The State of Digital Out-of-Home in MENA

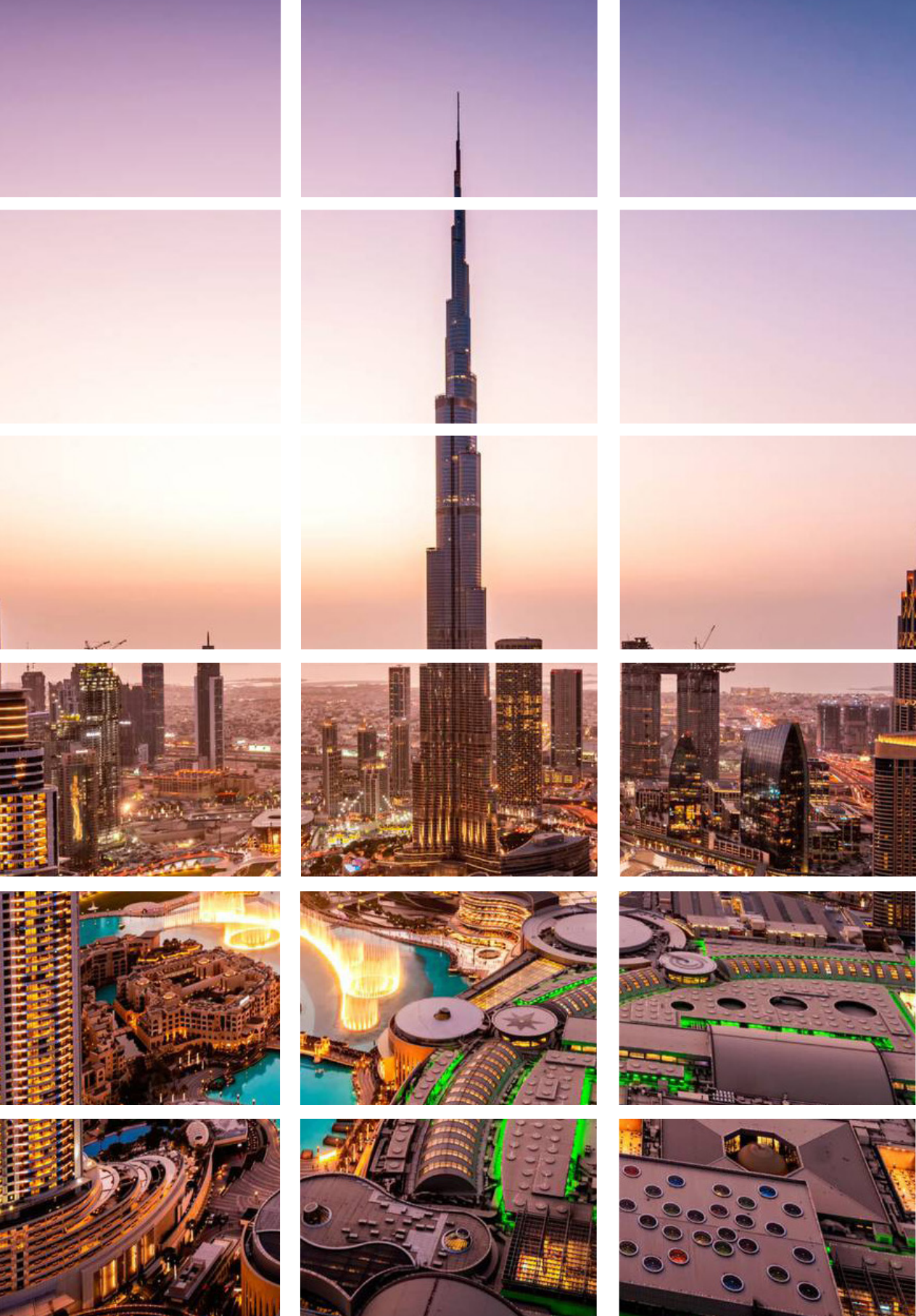# Table of Contents

01
FOREWARD

" Digital out-of-home (DOOH) is a rapidly evolving communication platform that has revolutionised the way advertisers interact with consumers. DOOH offers an array of dynamic and interactive content delivery options that enable brands to create impactful and engaging campaigns that capture the attention of their target audience. DOOH has been gaining significant traction globally, as it allows for seamless integration with other digital platforms – such as social media and mobile devices – to provide a holistic brand experience. As a result, advertisers are investing more in DOOH, and it is becoming an increasingly critical channel in their media mix.

In the MENA region, DOOH is becoming more prevalent, with countries such as the UAE and Saudi Arabia leading the way. The region's fast-growing digital infrastructure, coupled with its young and tech-savvy population, makes it an ideal market for DOOH. Furthermore, DOOH presents an opportunity to bridge the gap between online and offline advertising, enabling advertisers to create more immersive and personalised experiences for their audiences. As DOOH adoption continues to grow across the MENA region, it is essential to understand the best practices and the current landscape of the industry. This white paper, published by IAB MENA, provides an in-depth analysis of the DOOH market in the MENA region, highlighting global best practices and exploring the DOOH landscape in the UAE and Saudi Arabia. "

Mohamad Itani

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amazon ads

ARABIAN OUTDOOR

ELEVISION

Google

Ipsos

MINDSHARE

OMG
OmnicomMediaGroup

7. SEVENTH DECIMAL

Starcom

TALON_
Think outside

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W GROUP
HYPERMEDIA | DIGITALL

IAB MENA task forces consist of subject matter experts from within its membership and are designed to execute specific initiatives. They are the primary opportunity for members to drive real progress in the industry.

For this DOOH white paper, the task force consisted of 18 individuals from 12 member companies. These companies cover all aspects of the DOOH ecosystem – from agencies and out-of-home (OOH) suppliers to technology enablers and measurement companies.

The task force met regularly between November 2022 and March 2023, bringing together this first DOOH white paper for the MENA region.

With thanks to all the companies involved.

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TASK FORCE

The UAE has prioritised digital transformation as part of its wider economic development and diversification. Until 2020, static formats dominated the OOH scene. Only in the past few years has the UAE witnessed a tremendous shift towards digital within outdoor.

Large-scale investment in the DOOH sector has led to the creation of a dynamic OOH landscape. Malls are now dominated by digital screens and digital assets prevail on public transport. Those screens are an intrinsic part of a consumer's drive to work, their trips to the supermarket, and metro rides. Anywhere and everywhere they go, they are engaged by attractive formats that grab their attention.

For a video presentation of the UAE's outdoor landscape, click here.

03

LANDSCAPE

In today's world, where people are exposed to a large number of digital ads every day, DOOH is a valuable tool for brands looking to cut through the noise. At its core, DOOH offers scale at a localised level. It also offers eye-catching creative opportunities, a non-disruptive user experience, and a means to extend the reach and impact of other channels.

The success of any advertising channel, however, depends on its ability to provide benefits to all parties involved. This is where DOOH really shines, as it allows for the targeting of specific audiences using proprietary artificial intelligence (AI) platforms. These platforms collect data on users' attention, customer demographics, and vendors' customer information. By leveraging this data, DOOH can deliver ads to the right people at the right time, increasing the chances of success for both advertiser and publisher.

04
VALUE PROPOSITION

DEMAND SIDE

Brand awareness: Targeting specific audiences and tailoring messages can increase the visibility and reach of a brand. Brand favourability and awareness are measured by third party providers such as mFour and Placed. Both track the impact of DOOH campaigns, enabling brands to optimise their DOOH campaigns.

Complementary: DOOH ads offer a unique opportunity to reach customers both online and offline. Research has shown that consumers who see OOH ads are 63% more likely to take an online action related to the brand.

Exposure: DOOH buying can be used to supplement direct buys and provide additional exposure through non-guaranteed inventory without long-term budget commitments. This allows advertisers to access a wide array of venue types at scale, helping to further their OOH reach and frequency.

Flexibility: By using a demand-side platform (DSP), buyers can quickly set up DOOH campaigns. Platform-based buying solutions also provide flighting and budget flexibility. This allows buyers to adjust their campaigns on the fly, making mid-campaign optimisations and changes as needed.

High impact, high visibility: DOOH is effective at capturing the attention of consumers, with 62% noticing digital billboards. In comparison, the click-through rate for search ads has declined by about 40% since 2017.

Privacy: People expect companies to protect and respect their privacy across all platforms. DOOH is a valuable tool for brands looking to meet these expectations. By utilising DOOH, brands do not collect or use personal data.

Targeted messaging: DOOH ads allow brands to target specific audiences and tailor their messaging, using real-time data such as location, time of day, and weather.

Trustworthiness: Research has shown that 58% of people believe in OOH messaging. This puts DOOH on par with trusted media such as TV.

SUPPLY SIDE

Audience insights: By connecting digital devices, brands can gather data about user behaviour, preferences, and demographics. They can then use this information to tailor their messaging and targeting.

Efficiency: The production process for traditional OOH involves high costs for a one-time-use. In contrast, advertising material for DOOH can be easily adjusted to a screen's format. The creative can also be transferred electronically and contributes to DOOH's overall convenience and efficiency.

Flexibility: By utilising various DOOH locations and screens, publishers can strategise and plan campaigns with higher reach and greater flexibility.

Inventory: DOOH offers the flexibility to display more than one advertiser at any given time. This means DOOH provides a much wider range of inventory options, allowing publishers to accommodate multiple clients and campaigns.

Targeting dynamics: DOOH allows for better insights related to target demographics. It also provides a more thorough and nuanced perspective of target audiences than standard OOH.

Technology: DOOH utilises technologies to create impactful and interactive ads. These technologies allow the unification of digital campaigns across various platforms.

The best practices showcased in this paper have been chosen based on the primary characteristics that make DOOH outstanding. The case studies portray ideal practices and are an inspiration to marketers for ideation, audience profiling, and planning. Some of the characteristics considered when shortlisting were:

1) Use of technology and creative formats

2) Cross platform implementation

3) Audience profiling

4) Programmatic distribution

The case studies are accompanied by measurable results that provide proof of the success of each.

For a video presentation of some of the best practices featured in this white paper, click here.

05
BEST PRACTICES

All-New Nissan Qashqai Launch

Campaign concept: Nissan's challenger spirit led to Europe's first bespoke 3D anamorphic experience. Created on London's Southbank with a simple and powerful proposition, the All-New Nissan Qashqai powers you through the beautiful storm called life. The All-New Qashqai can be seen boxed inside a 3D cube sculpture, standing strong as it faces the storm. Then the Qashqai dramatically appears to smash through the giant 3D anamorphic cube, revealing the new and improved vehicle. Audiences had the opportunity to scan via their phones and continue the experiences on their devices with augmented reality.

1) USE OF TECHNOLOGY AND CREATIVE FORMATS

2) CROSS PLATFORM IMPLEMENTATION

#SendingLove

Campaign concept: #SendingLove was a global initiative to promote messages of love and raise money for the global Covid-19 Solidarity Response Fund. User-generated messages of love and unity were displayed on digital OOH screens in 38 countries, with social media amplification ensuring the messages were seen by millions at home.

Reach:

✔ 68 media owners worldwide

✔ 178 cities worldwide

Results:

✔ 33,000 people walked past the installation

✔ 40 million people viewed the content online (paid)

✔ 10% point increase in views to website

ASOS

Campaign concept: With DOOH ads in Display & Video 360, brands can combine the emotional power and captivating formats of traditional OOH with the efficiency of other digital channels. ASOS used Display & Video 360 to quickly select digital billboards with the map UI and arrange relevant programmatic guaranteed deals with leading publishers in the UK and the US. This streamlined approach allowed the brand to lean on a central platform to buy, implement and measure their campaign.

Results:

✔ Hundreds of digital billboards were booked

✔ 22 million viewed impressions across the two countries

McDonald's

Campaign concept: This campaign was built based on audience requirements. McDonald's targeted light and infrequent visitors to its restaurants and used an intelligent audience targeting platform to plan and measure. Custom audience segments were created to produce accurate predictions of how these people behave, and how to best target them on their everyday journeys.

Results:

✔ 30% on-target audience impacts delivered vs 'value seekers'

✔ 50% increase in footfall

✔ 4.5 x more visitors generated by campaign

With an increase in digital screens, OOH is becoming more automated and ultimately programmatic. This new ecosystem has spurred the introduction of multiple AdTech layers, including ad verification, audience targeting, and attribution. This in turn requires an upgraded and dynamic measurement system.

Media measurement provides advantages to all stakeholders in the OOH and DOOH ecosystem. These benefits include:

◆ The ability to create optimised, cost-effective campaigns based on the use of media and audience exposure figures

◆ Proof that a DOOH campaign was effective

◆ The opportunity for media owners to optimise DOOH strategies, strategically add new inventory, and fairly value existing DOOH assets

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MEASUREMENT

A reliable and accurate media measurement system is essential and – alongside independent verification – will play a significant role in attracting more investment and growing the DOOH ecosystem. In Australia, OOH advertising expenditure grew from 500 million AUD to 900 million AUD in six years.[1] This increase was mostly driven by a steady growth in supply and advances in audience measurement.

HOW IT WORKS

Media measurement should seek to adopt a syndicated approach across static OOH, DOOH, transit media, and place-based media. It should avoid customisation. This will drive growth of the ecosystem at a faster pace and requires collaboration between stakeholders. A unified methodology should be applicable to all assets across all ad formats and placements, using a transparent and privacy-compliant system.

DOOH measurement should:

◆ Capture passbys and frequency and quantify the variation of these figures in terms of the variation of DOOH settings – namely ad rotation length, loop duration, ad unit length/duration, and position in sequence.

◆ Report data for a single screen and for a group of screens combined. It should also provide pre-campaign assessment (essential for planning and programmatic DOOH) and post-campaign level data for actual flight dates.

◆ Offer a consistent definition of impressions that brings DOOH closer to digital media and provides the basis for impression multipliers on programmatic DOOH.

◆ Support interoperability, including the integration of sensor data, IOT data, and first party data in order to remain future relevant.
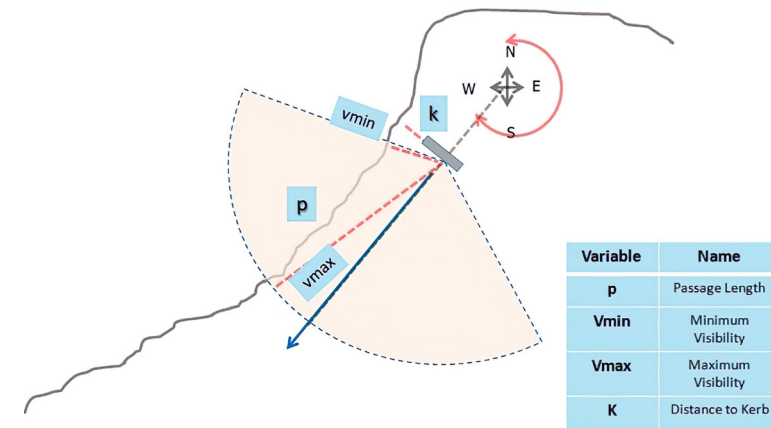
Understanding audience duration in front of a screen – as well as advert duration – is critical to calculating the overall opportunity to see (OTS). Each exposure can then be visibility adjusted to understand the total delivery of impacts from that screen. Those impacts can then be shared amongst advertisers. All approaches require an understanding of the relative value of a DOOH screen across both hours and days.

SYSTEMS OF MEASUREMENT

Multiple systems of measurement have been introduced over the years. In the GCC, there are two available research methodologies. The first was introduced by Ipsos in the UAE in 2012 (followed by Kuwait and Lebanon). The second was introduced by Seventh Decimal in Saudi Arabia in 2020. Called Streach, it was also introduced in the UAE and Bahrain in 2021.

1 *From a speech by Charmaine Moldrich, CEO of the Outdoor Media Association – World Out of Home Organization APAC Forum, October 2022*

Variable	Name
p	Passage Length
Vmin	Minimum Visibility
Vmax	Maximum Visibility
K	Distance to Kerb

IPSOS METHODOLOGY

In order to produce an industry standard, the core principle of Ipsos' solution requires a clear statement of the geographic area and population being surveyed. It also requires an accurate list of the type, position and visibility of all the display panels being measured; a survey of the individual's behaviour; an estimate of the number of people in the target universe passing every panel; an adjustment of the gross numbers to correct the likelihood that a panel will be seen; and movement data at roadside level not derived from the survey data.

In the UAE, Ipsos provides full outdoor measurement that includes:

◆ Inventory mapping system (IMS)

◆ Visibility adjusted contact (VAC)

◆ Traffic intensity model (TIM), including travel habits survey (THS) and mobility data

◆ Delivery system: planning tool

The IMS is a web-enabled, in-house solution that is updated weekly, used for ad verification, and updated when new formats are placed. This includes meticulously gathering all pertinent information about each site. The primary goal of any IMS is to provide frame data input for audience modelling processes, which are then used to calculate reach and frequency.

For every face on the digital map, Ipsos builds an angle of visibility for which the calculation of the VAC involves a number of phases. These include the calculation of the cone of visibility using globally applied rules, and working out which links are within the cone and within the line of sight of the panel.

The visibility adjusted accumulation must be calculated separately for each face based on the duration of the approach for which the ad is visible. This is based on the following variables: frame size; illumination; maximum visibility distance; angle of panel to road; distortion; setback from road kerb; traffic speed; construction height; and number of traffic lanes to determine the realistic opportunity to see (ROTS). The ability to account for these variations has been built into the Ipsos delivery system.

Producing an estimate of the number of opportunities to contact in a given period of time involves calculating the number of cars passing within the visible range of a panel and travelling in a direction such that the display on the panel can be seen. The raw figure of cars passing the panel must be adjusted to remove those who cannot see it. The graph (above) explains what factors are considered when calculating the angle of visibility.

The Vmax has the best chance of being seen, given that the passenger is moving towards the panel. Unlike the Vmin, the likelihood of a passenger seeing the panel is determined by the distance and direction from the panel.

K represents the distance between the panel and the kerb, aimed at cars and pedestrians, and how visible the panel is to them.

Understanding the increased visibility or attractiveness of a screen can only be addressed through new visibility research. This involves giving subjects appropriate prompt material to simulate the passage past a digital screen from different modes of transport and recording the attractiveness of a screen in direct comparison with a static frame, especially at the point of transition from one. The VAC for digital faces should be adjusted according to the duration of each ad and the share of time that is bought for a particular spot.

The TIM is a combination of traffic counts, sets of attributes for each kind of road, and a modelling process to create these estimates for outdoor environments along routes where people pass in view of an OOH panel. Other components of the system include a representative THS, which is used to get a picture of the types of people represented in these numbers (e.g. gender, age, area of residence, nationality etc) and to understand how individuals travel between different points. Third party mobility data comes as a layer, where each street link delivers the number of people inside cars travelling in all legal directions and this is based on all relevant external data sources on flows like open or paid data.

The combined solutions end in the inventory delivery system (IDS), a planning tool that delivers pre/post campaign performance, campaign optimisation, reporting impressions, impact, reach, reach percentage, GRP, and frequency, among total population or a specific target audience in the country.

SEVENTH DECIMAL METHODOLOGY

Streach provides exposure and audience metrics for OOH, DOOH, and transit media. It is a web-based system available for advertisers and media owners for pre-campaign forecast and post-campaign analysis through the following modules:

◆ *Explorer:* An extensive database of audited and up-to-date OOH inventory

◆ *Simulator:* For pre-campaign assessment and projected campaign results

◆ *Measurement:* For post-campaign media measurement

Seventh Decimal's methodology through Streach is centred around measuring observed, temporal audience exposure through a representative high-volume mobility dataset. It encompasses the results and findings of over four years of local field work, research, testing and development in the OOH media space.

The methodology includes an accurate digital representation of OOH coverage areas, an always-on mobility dataset with origin/destination analysis correlated with the city population, and an extrapolation algorithm that considers seasonality of both in-market and out-market populations.

Streach was designed to support:

◆ A dynamic measurement system that can provide daily updated metrics for both static and DOOH on face-level, network-level and aggregated campaign-level

◆ Metrics that are comparable with other media within the omnichannel mix

◆ An increased temporal granularity and a contemporised delivery of data to reflect the changes in traffic circulation and market seasonality (particularly important in cosmopolitan cities)

◆ Detailed multi-level aggregated datasets (face-level, ad format-level, network-level) that enable more granular and accurate marketing mix models or multi-touch attribution models

◆ Forecasted impressions that could be used for impression multipliers on programmatic platforms, and actual post-campaign audience impressions

Streach measures reach, reach percentage, frequency, passbys and impressions. Impressions are defined as Opportunities to Read (OTR). OTR is a quantification of the number of opportunities to read an ad unit offered to a passer-by while in the coverage area of an OOH face.

Streach impressions/OTR serve to fill a gap
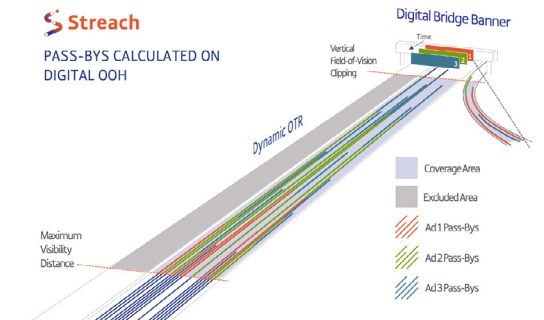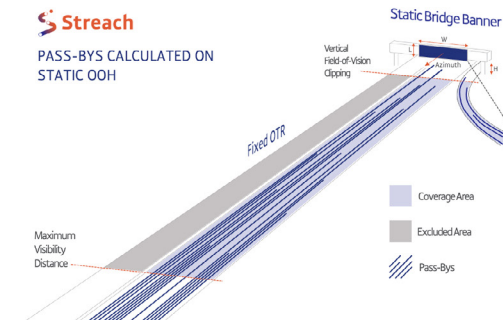
globally for a metric that falls between 'oversimplified' passbys (circulation) and subjective qualitative indicators such as Likelihood To See (LTS).

While static OOH impressions are measured based on passbys recorded on the face-level, DOOH impressions are measured based on passbys recorded on a spot or ad-play level. Streach adopts a deterministic approach to synchronise the individual passbys from the representative universe with the exact time (in seconds) that a specific ad was in rotation on a screen.

A passby is logged when an individual from the population universe enters and exits the OOH coverage area. In DOOH, a passby is logged when an individual from the population universe enters the coverage area within the duration of an ad play (Figure 1).

The ad unit length also impacts OTR and exposure time on DOOH within the coverage area. Streach supports a dynamic OTR for DOOH measurement that quantifies the opportunities to read an ad, and this is

reflected in the calculation of impressions. Impressions measured for an eight-second ad are different from impressions measured for a 10,15 or 20-second ad etc. Within the same hour, on the same digital screen, impressions can vary significantly between two ads with different durations. OTR provides a more accurate measure of ad-level impressions compared with averaged hourly impressions or share of voice (SOR) calculations.

Finally, a higher ad unit length usually translates to a higher OTR value, but a tradeoff should be done between impressions and reach/frequency by media suppliers to deliver impactful DOOH campaigns.

As a future roadmap, in addition to the quantitative metrics, reliable qualitative metrics are being developed in an attempt to highlight the visual attractiveness of DOOH. This is a global effort to understand the increased value of DOOH and is highlighted in the World OOH Audience Measurement Guidelines.

Data-driven and programmatic trading of DOOH is relatively new in the MENA region, with the first programmatic DOOH campaign taking place in 2020. Since then, the DOOH inventory available to be traded programmatically has increased year-on-year.

Today, the MENA region has over 1,766 screens in more than five markets. These are available to access programmatically via demand side platforms (DSPs) and are bought on a cost per thousand (CPM) basis.

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CONCLUSION

The expansion of the MENA region's programmatic inventory has been driven by:

◆ An increase in the digitisation of screens

◆ Advertiser demand for a more efficient buying model

◆ The launch of more OOH products

◆ An increase in programmatic DOOH investments globally

Despite these advances, the region must improve if it is to reach global standards of data-driven strategies, targeting, and programmatic trading. Many of the targeting capabilities available globally are still in their early stages of implementation regionally, or are lacking completely.

THE WAY AHEAD

There is a responsibility on both the demand and supply side of the industry to ensure that DOOH in the MENA region embraces more automation, data-driven strategies, and verified, insightful measurement.

On the demand side, advertisers and agencies play a pivotal role in ensuring continuous demand for programmatic OOH inventory, both from media owners and for DOOH integrations from DSPs.

On the supply side, the adoption of programmatic OOH is inevitable, with international advertisers requesting that global standards be implemented in the MENA region. However, the pace of

programmatic DOOH adoption is dependent on the speed and agility of media owners to transport and provide the market with a bigger share of programmatic inventory. Only when this is achieved will advertisers in the region be able to leverage the data-driven capabilities adopted globally.

NEXT STEPS

With DOOH media being traded increasingly through automated or programmatic platforms, it is important to treat these platforms as third party users of the data. Guidance should therefore be offered to ensure that metrics supplied by these platforms are consistent with the published data. This becomes increasingly important as sales side platforms (SSP) are required to apply an impression multiplier to DOOH opportunities. A single ad purchased in an online environment will be served to a single device, and potentially reach a single member of the audience, whereas a single ad served on an DOOH frame is likely to reach multiple members of the audience simultaneously. This needs to be reflected in the data provided by SSPs to advertisers.

To maintain credibility as a currency, it is important that both the buyers' DSP and the sellers' SSP are using the same metrics. And where those metrics are adapted, that the method of adaptation is both agreed and transparent to all parties. Where DOOH metrics are provided at a level of granularity that can be used directly in automation – single frame, single hour, single spot – there should be no disagreement in the audience delivery.

This glossary is a collaborative effort between all members of the IAB MENA DOOH task force to define a set of terms that cover the entire DOOH ecosystem. It is worth noting that globally some terms are not unified, especially around ad serving and measurement. As a consequence, in this document there might exist multiple definitions for a single term.

The terms in the glossary are grouped into four main sections based on their usage. Terms used solely by Ipsos are marked with *. The terms used solely by Streach are marked with **.

08

GLOSSARY

AD SERVING

Ad campaign

A series of ad units delivered for an advertiser during a defined period of time.

Ad copy

Ad copies represent individual media files that are imported into the system and stored in the server. A standard ad copy is often a basic image or video file. After importing the content files, players can download and display them on digital screens.

Ad player

Any device (hardware or software) that distributes video and audio content to a display.

Ad rotation length

The number of seconds required to play all of the ads in a rotation or loop. Also known as loop duration.

Ad segment

The portion of the loop – or some other defined period of time – containing advertising content.

Ad server

An ad server is a web server dedicated to the delivery of advertisements. This specialisation enables the tracking and management of advertising related metrics.

Ad serving

The online delivery of an advertisement to a display. This is typically done through an ad server and allows an advertiser to track and measure the performance of an ad.

Ad unit

An asset (also referred to as a frame or spot) designed to deliver a message intended for an advertiser's existing or prospective customer base. Ad units are designed to conform to the media in which they will be delivered.

Ad unit length

Unit of time representing the segment of the loop containing ad content.

Ad unit orientation

The proportions of an OOH frame – referred to as either landscape or portrait.

Advertising spot

A unit interval (10-second, 15-second, 20-second, 30-second, etc.) containing a commercial message supplied by an advertiser for insertion in the transmissions of a digital signage network.

Animated GIF

A type of image that combines multiple static images and displays them in order, which gives the appearance of movement.

Aspect ratio

The dimensions of a display screen's image expressed as a ratio of the horizontal width to the vertical height.

Campaign delivery

The audience delivered by an OOH advertising campaign.

Circuit

A circuit or network is two or more OOH/DOOH faces that are usually bundled to display one campaign.

Content

Editorial material displayed alongside OOH advertisements.

Content distribution server

A server or computer used to store content for distribution to digital signage.

Copy

The advertising displayed on an outdoor frame.

Copy area

The viewing area on an OOH frame.

Cost per Play (CPP)

The cost (price) to deliver an ad play on a screen.

Cycle

The interval of time when an outdoor advertising frame or campaign is run. Also referred to as display period.

Delivered play

The number of times a creative (with a defined spot length) plays fully.

Digital place-based media

Addressable OOH screens that change advertising content remotely, excluding roadside digital OOH media such as billboards and bus shelters. Digital place-based media includes a broad range of content, including static messages and full motion video with an audio track.

Display   See 'frame'.

Display period   The interval of time when an outdoor advertising frame or campaign is run.

DOOH (Digital-out-of-home)   Any OOH display that can change its advertising content remotely – generally LCD or LED screens.

Dynamic content   The process of creating and enabling responsive and editable creative messaging to deliver contextually relevant messages driven by the smart use of data across DOOH.

Dynamic OOH   An OOH frame that shows more than one ad message.

Events   Events are special campaigns that can be scheduled outside of the regular playback loop to appear at a predefined time.

Face   The surface area on an OOH unit where advertising copy is displayed. A structure may have more than one face.

Flight   The advertising campaign period for a particular advertising spot or spots, expressed in days or weeks. Also known as duration.

Format   Refers to the type of OOH media. For example, bridge banner, unipole, digital screen, among others.

Frame   The surface area on an outdoor unit where advertising copy is displayed.

Frames per second (FPS)   The speed at which still images (frames) in a video or animation are played in succession by an imaging device. Sometimes expressed as hertz (Hz).

Gap length   The time gap between spots of the same advertiser.

Loop   Segments of content and advertising programmed to a specific length that repeats on standard intervals. For example, a 40-second loop of five ad positions of eight seconds each.

Network   See 'circuit'.

OpenRTB   The IAB standard for Real Time Bidding (RTB) now used by most DSPs.

Operating hours   The period of time each day the frame location is displaying advertising and content to audiences.

Out-of-home (OOH) media   All media formats specifically intended to reach consumers outside the home.

Panel   The surface area on an outdoor unit where advertising copy is displayed.

Plant   A media company's entire outdoor advertising inventory.

Playback format   The final format in which the ad unit will be played across the network. Networks shall disclose the playback format.

Player   Any device (hardware or software) that distributes video and audio content to a display.

PoP   Acronym for 'Proof of Play' or 'Proof of Performance'. A reporting mechanism in which logs are used to show that an ad actually played back on a digital screen or network. Some advertisers now also demand 'proof of display' – verification that the ad was actually shown on the screens, as well as third-party audited play logs.

Position in sequence   The position of a specific ad play within a loop. The position in sequence indicates the specific periods in time where an ad will be displayed within a fixed loop.

Posting date   The date when an advertising billboard is set up or a digital LED screen display program is scheduled to commence.

Private marketplace   A way to buy/sell programmatic advertising. This auction type is very similar to an open auction, except a publisher restricts participation to select buyers/advertisers.

Programmatic   A trading technique applying automation in the buying and selling of media, often using data to value the media bought.

Real time bidding (RTB)   An automated auction process in which multiple buyers can bid in real time for available digital ad inventory.

Resolution   Refers to the clarity and detail of an image relating to the number of lines (horizontal and vertical) of pixels.

Rotation   The process of moving the advertiser's message from one location to another at stated intervals to achieve a more balanced coverage of a market. Rotation sometimes also refers to the ad position in a loop.

Schedules   Schedules are the resources that tell campaigns which content to display and during which block of time to display it. A campaign can have multiple schedules that it will play through one by one every time their turn comes in the playlist.

Screen   A device or medium designed to deliver digital signage or DOOH advertising content, whether it be video, audio or both.

Served impression   An ad that was reported to have begun to render at the screen. Note that in the vast majority of DOOH experiences, all ads (when served) are fully viewable for the entirety of the play. In the digital media world, this term is commonly known as a 'play'.

Share of time (SOT)   A percentage share of time on a digital display that has been used by an advertiser.

Share of voice (SOV)   A percentage share of a defined market that has been used in an advertising campaign.

Sign   Panel, frame, screen.

Spot   A piece of advertising creative content.

Spot length   The amount of time the advertiser has to play their creative.

Supply-side platform (SSP)   A piece of software used to sell advertising in an automated fashion (programmatic).

Synchronisation   The same content playing on multiple screens or frames at the exact same time.

Transit   Outdoor and indoor inventory affixed to moving vehicles or positioned at transport hubs.

Transit advertising   OOH advertising appearing on the exterior or interior of public transportation vehicles or stations.

Transition   The change from one message to another on a dynamic OOH frame. Transition between one ad play and another within a loop.

Vendor   Could refer to media owner or screen/digital technology manufacturer.

TARGETING

Advanced audience data   Advanced data (or audience data) is a data set used for the purposes of making ad decisions beyond what can be leveraged from age and gender. It may include the use of first-, second- and third-party audience data for buying and targeting.

Affinity   Measures the suitability of an advertising vehicle for a specific target group. The higher the affinity, the lower the scatter loss.

Affinity index   Reach within target group divided by reach in the underlying universe multiplied by 100 (the higher the index, the greater the affinity).

Audience   The number of individuals counted as having consumed media. Audiences can be segregated based on

demographic or other characteristics for reporting purposes, as well as dayparts and/or week-parts.

Audience composition The demographic, socioeconomic, or behavioural profile of the network's audience that is inclusive of the percentage of the total audience falling in each segment.

Audience demographics Refers to the characteristics that define who the target audience is. Such items as age, gender, ethnicity, cultural background, religious or political affiliations, economic status, family background and group memberships may help define the demographic.

Audience reach % Percentage of an addressable target audience reached by a given campaign.

Behavioural profiles Profile based on past-observed behavior, typically within 30 to 90 days of recency. Behavioural profiles may or may not refer to a profile about unique users.

Behavioural segments Segmenting audiences that are defined by previous behaviours, frequently their recent online behavior or offline purchases and visitation.

Data management platform (DMP) A piece of software that collects, stores, manages data about users for the purposes of profiling, analysing and targeting an audience.

Day part A set period of time or proportion of a day to define audience delivery.

Demographic audiences Audience breakdowns based on various characteristics such as age, sex, income, education, etc.

Demographic targeting A method of showing a specific piece of content (e.g. an advertisement) to a group of visitors based on their age, gender or household income.

Digital billboard Billboards that can change advertising content using digital technology. Content is static with multiple advertising

message presented in rotation every few seconds.

Environment The place and location of the advertising network and screens. For example, retail and metro, among others.

Geofencing A technology that allows an advertiser to select a geographic point using latitude and longitude information and then to create a radius, or virtual 'fence' around that point to deliver a digital communication to a particular audience.

Geographic targeting Targeting audiences defined by their location in the real world. Location attributes can vary from granular attributes such as mobile/GPS-enabled latitude/longitude data to broader attributes such as DMA or district/state.

Look-alike targeting Targeting audiences that have some number of attributes in common with an audience of interest. For example, an advertiser may target 'look-alikes' of past purchasers – i.e. those who share demographic or behavioural characteristics of past purchasers, but have not themselves made a purchase.

Media plan A plan for an advertising campaign that specifies details of the selected media, advertising content, dates and delivery goals.

Media unit A unit defined by a DOOH network that describes the physical space on which a DOOH ad unit will play. Most often for digital place-based networks, a media unit is a single screen. However, in locations where multiple screens are combined to portray content that is larger than one screen, the entirety of that group of screens may be referred to as a single media unit.

Place-based Located at a destination venue (indoors or outdoors) with associated dwell time. Place-based media audiences are typically pedestrians, or can be individuals located within a venue.

Psychographic targeting

Targeting audiences defined by personality, interests, attitudes or mindsets – e.g. financial optimists, environmentally-conscious consumers. Often driven from offline surveys and stated preferences.

Retargeting

Targeting audiences that are defined as having recently shown interest in, or having recently been exposed to, an ad.

Segmentation

Dividing a broad group of consumers or businesses into subgroups (known as segments) based on shared demographic/psychographic/behavioural attributes. Segmentation is often used to create target audiences (comprised of one or more segments) or to customise an offer or message for specific segments.

Target

Any audience reflecting the most desired consumer prospects for a product or service defined by age, sex, race, ethnicity or income; or their combinations for any geographic definition. Expanded targets include purchasing, behavioural, and audience segmentations.

Target audience

A specific group that an advertiser seeks to reach with its campaign. Target audience is defined by a certain attribute or set of attributes (e.g. women aged 18 to 24, sports car lovers, shoppers in-market for a new car).

Venue

The place and location of the advertising network and displays.

MEASUREMENT

Ad audience

The number of individuals estimated to be in the display audience while ad content is present and deemed viewable.

Ad exposure time *

The length of time the audience spent viewing when ad content is present and deemed viewable.

Ad recall

The estimated number of people likely to remember your ads within days of being exposed.

Audience delivery

The size of an audience that notices OOH advertising.

Audience impression *

See visibility adjusted contacts (VAC)

Brand lift

A measurement of an advertising campaign's effectiveness in driving a positive shift in customer awareness and perception of a brand.

Circulation

A measurement of traffic volume in a market. Circulation only estimates the number of people with an opportunity to see an OOH display.

Cone of vision

The field of view for an individual. Also known as the area of sight. It extends from the subject as a 120° cone.

Cost per point

In print and broadcast media, cost of reaching one percent (one rating point) of the households of a targeted demographic segment or geographical area. Also called cost per gross rating point (CPGRP).

Cost per ratings point (CPRP)

The cost of advertising exposure opportunities that equals one gross rating point (GRP).

Cost per thousand (CPM)

The cost (price) to deliver 1,000 ad impressions on displays in a market.

Coverage

The number of individuals delivered by an advertising campaign or network of frames.

Coverage area **

In Streach, the coverage area refers to the actual real-life geographic area in proximity to an OOH face or panel where the face is fully visible.

CPS (cost per screen)

Refers to the total cost of advertising distributed over the network on a per screen/display basis. It is different that CPM but some advertisers prefer it.

Currency

By creating a common measure of all formats equally,

and giving a specific value to each, media space may be planned, traded, evaluated and reported based on the currency.

Delivered impacts *
The number of times a creative has been viewed, as defined by routes impact scores.

Display exposure zone
See 'visibility area'.

Dwell time
The time spent by an audience member in the visibility area or the coverage area of an OOH frame. For DOOH, dwell time refers to the time spent in the visibility area or coverage area when a specific ad was being displayed. In Streach, dwell time refers only to the time spent by individuals within the coverage area while moving in a direction facing the OOH or DOOH frame. Can be also defined as the time to cross the coverage area.

Eccentricity
The angle of viewing between the audience and the face at a specific distance.

Exposed – store conversion rate
Rate at which exposed audience visited the store per impression served.

Exposure
Presence in the defined screen exposure zone or coverage area while content is deemed to be viewable, though this does not require that the content be viewed. Exposure is also often referred to as opportunity-to-see. In Streach, exposure is analogous to pass-by.

Eye tracking
A survey methodology that records the movement of the eye and its fixations in relation to what an individual is looking at. Eye tracking is usually used in LTS calculations for OOH.

Facing
The direction a frame is pointing – may be relative to audience flow or to true north (Azimuth).

Frequency
In an OOH context, frequency is the average number of times an individual notices/passes by an OOH advertising message during a defined period of time.

Frequency distribution
Distribution showing the percentage of the target audience population who have been exposed to a schedule of faces at each level of frequency.

GPS
Global Positioning System. The satellite navigation system that provides precise location information for electronic devices such as smart phones.

Gross impressions *
The number of individuals over a period of time with presence in the defined exposure zone. May be also defined as OTS or ROTS.

Gross rating points (GRPs)
The total number of impacts delivered by an OOH schedule expressed as a percentage of total market population.

Impact *
One individual, seeing one advert, once. This is a mathematical rule applied in audience calculations. The definition of a route impact uses likelihood to see (LTS), not opportunity to see (OTS).

Impressions **
Defined in Streach as total opportunities to read. See OTR.

Likelihood to See (LTS)
An estimation of the probability of viewing an ad that is generally based on eye tracking or attention mapping studies. LTS is a qualitative metric that usually complements quantitative measurement metrics. The accuracy of LTS is highly dependent on the representativeness of the studied sample in relation to the local market.

Line of sight
The simultaneous viewing of more than one OOH unit.

Location traffic
Passers-bys or circulation.

Maximum visibility distance
The distance measured along the line of travel from the point where an advertising unit first becomes fully visible to the point where the copy is no longer deemed viewable.

Media market **
Defined in Streach as the population aged 15+ residing

Multi sensor tracker (MST) within a given city (in market), and visiting the city (out market). The media market corresponds to the total available OOH audience within a given city.

Multi sensor tracker (MST) Multi sensor tracking devices are used by route to monitor the movement of participants in a travel survey. These use a combination of GPS and other sensors to detect people's location and movements on a second-by-second basis. They are designed to work both above ground and below, even when there is no mobile signal available. These provide accurate positioning to one metre.

Opportunity to read (OTR) ** Defined in Streach as the number of opportunities offered to a passer-by to see and read a fixed amount of data on an OOH face. OTR is uniquely calculated per OOH/ DOOH face, and takes into consideration all attributes relating to the OOH face and surrounding roads that impact to possibility to see and read.

Opportunity to see (OTS) The number of individuals over a period of time with presence in the defined visibility area.

Orientation The direction a frame is pointing, relative to true north (Azimuth).

Parallel When a poster frame is parallel to a particular flow of traffic or pedestrian flow.

Passbys ** Defined in Streach as an individual entering and exiting the coverage area of an OOH face. Repeated passbys over a campaign's duration account for frequency. In DOOH, Streach passbys are deterministically synchronised with the ad unit in play to calculate ad-level passbys.

Passive Describes research fieldwork that requires minimal input from the participant. At a practical level the data is simple to process and subject to fewer input errors than in active or survey-based methods.

Performance Evaluation of a campaign's achievements after the event.

Play A play in DOOH differs from an impression in online, as it has a defined length, start and end time.

Population The total potential audience available to be measured – population can be segregated based on demographic or other characteristics for reporting.

Reach The net (unduplicated) count or percent of the OOH universe or of the defined target audience exposed to content, advertising, or a specific ad, in a screen within a defined time frame- campaign duration.

Reach % ** Defined in Streach as the ratio of the total deduplicated count of individuals who passed-by an OOH face to the media market per city, for a specific campaign, over a defined duration. In DOOH, the total deduplicated count of individuals is derived from the synchronised passbys to a specific ad unit being measured.

Reach and frequency The estimated number of people exposed to an advertising campaign, and the average number of times they have been exposed to it, in a defined period.

Realistic opportunity to see (ROTS) * The number of individuals in the defined visibility area or coverage area whilst the advertisement is displayed.

Recall Market research where respondents are asked to remember the advertising they have seen.

Respondent A respondent is a participant in a research study.

Return on investment (ROI) The value of increased sales or other measured outcomes over the cost of achieving those outcomes.

Store conversion rate Rate at which exposed consumers visited the store per impression served.

Store visits Total number of store visits attributed to the campaign, based on store visitation behavior observed and the total number of impressions for the campaign.

Streach universe **
Refers to Streach's normalised, geographically correlated, and always-on mobility dataset, that is used to measure OOH.

Target rating point (TRP)
The total number of impacts delivered by an OOH schedule against a specified target audience group expressed as a percentage of the population of that target group. In Streach, TRP is defined as the ratio of the deduplicated count of individuals from a specific target audience exposed to a campaign, to the total count of individuals from the same target audience available within a city.

Traffic
Volumes of people moving, whether on foot or in vehicles.

Traffic count
The measured number of vehicles (including their occupancy rate) and/or pedestrians passing a given point.

Traffic intensity model (TIM) *
A complex mathematical model that incorporates all findings about traffic, vehicular and pedestrian. The model ascribes volumes of people-flows to roads and pathways on a map.

Travel mode
The mode of travel used by people when passing advertising units.

Unique traffic
The unduplicated audience that has an opportunity to see any message during a reporting period.

Universe
The population count within a defined geography against which OOH or DOOH are measured. The universe may be customized based on specific attributes of the population, for example, residents aged 15+.

Venue traffic
The total number of individuals estimated to be present in the venue.

Visibility
The area of research that, using eye-tracking methods, produces data on the probability that an advert is visible to the viewer.

Visibility adjusted contacts (VAC) *
This is an Ipsos/Route term, and refers to the number of individuals in the defined visibility area, facing the advertising frame whilst the advertisement is displayed, adjusted for the probability that they have looked at that ad content.

Visibility adjustment (VA) *
A ratio or the percentage of a frame's total OTS audience who are likely to notice an ad (VAC).

Visibility area
The area from which an OOH frame can be viewed without defined obstruction.

Wastage
The proportion of an advertising campaign's expenditure or advertising weight which is not seen or heard by the specified target audience.

Weighting
Statistical adjustments, conducted before data are analyzed, which adjust for respondents' unequal probabilities of selection in probability samples.

PROGRAMMATIC

Automated Guaranteed
A programmatic ad transaction that most closely mirrors a traditional digital direct sale. The deal is negotiated directly between buyer and seller, the inventory and pricing are guaranteed.

Bid Rate
Bid Rate is a Programmatic Auction metric that shows how many Bids are occurring in the Auction. This is usually determined by one's bid price and the frequency cap. The advertiser will only pay for impressions that are won.

Bid Request
A bid request is a function that is triggered when a user visits a digital space with ad units on it. It then requests an ad so that it can be displayed in the ad units for users.

Bid Response
The response that gets sent by the DSP inside RTB system to address the Bid Request that was sent by SSP, Ad Network

or Ad Exchange. The bid request normally comprises information about the amount of bid, an ID of the creative (banner or video), and ID of the participant that made a bid on the auction.

Content Management Software/System (CMS)

An application used to create, schedule, manage and modify digital content. Digital signage software used to manage and schedule is an example of a content management system.

Deal ID

Also known as a deal identifier, is the unique number assigned to an automated ad buy.

Demand side platform (DSP)

A technology platform that provides centralised and aggregated media buying from multiple sources including ad exchanges, ad networks and sell side platforms, often leveraging real time bidding capabilities of these sources.

Frequency capping

A limit/cap on how many times a specific user is shown a particular advertisement within a given time period.

Impression multiplier

The multiplier is an OOH specific metric which informs the buyer exactly how many impressions are delivered in a single ad play. In programmatic DOOH, one bid request accounts for one ad play, therefore the multiplier highlights how many impressions are included per bid request.

Open auction

A way to buy/sell programmatic advertising. It is the least-restrictive type of ad auction, with a media owner/publisher generally allowing any and all buyers to participate in accessing the ad inventory.

Seat ID

A unique identifier used to offer inventory to specific buyers on a DSP platform.