

Programmatic DOOH ↘

QUESTIONS & ANSWERS

Nikki Hawke

Hivestack, Chief Marketing Officer



1 With omni-channel DSP's ramping up in the USA and slowly starting to activate in Canada, **how do you see things changing in the next 1-2 years in the pDOOH space?** What are you doing as an SSP to prepare for this?

The entrance of omnichannel DSPs into programmatic DOOH marks an exciting inflection point for our industry. We are a full stack platform, and so our supply-side business truly embraces their presence. **We are working with DSPs globally and we are helping facilitate these relationships in Canada** for our publisher partners.

2 As an SSP, **how do you differentiate yourself from your competitors** when every competitor has the same, or very similar inventory and scale?

According to a recent [AdExchange article](#), display and mobile publishers use about 5–7 SSPs. We feel the same is happening in DOOH, where publishers will end up using several SSPs. This is because some SSPs have access to unique demand partners. And so we believe **the differentiation of SSPs will lie mostly in access to quality demand**. For example, publishers that use the Hivestack SSP have front row seats to agencies that use the Hivestack DSP or a whitelabeled version of the Hivestack DSP.

Another differentiation point of DOOH SSPs will be in facilitating cross-channel buys. For example, the Hivestack SSP is able to provide exposed MAID passbacks, enabling cross-screen retargeting.

3 **What role does the DOOH sales reps play** in the programmatic sales channel?

DOOH sales reps are able to sell curated programmatic buys in the form of always-on deals or one time PMP setups. We're seeing a bit of a shift from directly sold campaigns that are I/O-based (where no DSP is used) to programmatic-direct campaigns sold by sales reps. In many cases, the buying agency is seeking a higher degree of automation and wants to run the buy through a DSP.

It also depends on which product publishers are looking to utilize and how their organization is set up. We are here to bring incremental revenue to publishers and we consider ourselves their partner. For example, if a publisher has integrated with our programmatic Ad Server, it enables their direct sales team to sell targeted, custom audiences more and deliver impressions.

4 Who does the **"planning"** in programmatic DOOH?

Again it varies on the organization, some of our agency partners are OOH specialists and part of global media holding companies and they plan, buy and measure the channel for their clients – sometimes utilizing Hivestack's whitelable DSP.



5 How do they see **omnichannel measurement playing out** on each of their platforms?

Omnichannel buyers are seeking to understand and measure whether exposure to programmatic DOOH drove a lift in outcomes on other channels. For example, did DOOH drive a lift in mobile ad clicks or video ad views? And so omni-channel measurement is often powered by first party data that marketers have on their clients. Hivestack is making sure such capabilities are first class citizens to both the buy and sell side.



Edith Gagné

Broadsign, Vice President,
Programmatic Sales Operations

Where do bespoke DOOH DSP's exist/
what role do they play once the big omni-channel DSP's fully adopt pDOOH?

We see bespoke DOOH DSPs as a catalyst to pdooh adoption in most, if not all, markets where pdooh makes an entrance. I see them as akin to an innovation incubator of sorts, coming at OOH from usually a digital or OOH (or combination both) talent & experience base. Typically rather small organizations with total laser focus on bringing efficiency and automation to OOH planning & buying through technology and data, who tend to be unbureaucratic and nimble. The variety and competition among these help propel innovative solutions and perfect OOH workflows, generating more interest from advertisers, agencies and omni channel DSPs. I don't think one DSP can specialize in all the things for all channels, so I do see a continual evolution and innovation of the space and further specialization in unique capabilities being driven by bespoke DSP as we continue to see more adoption by the omnichannels. To that end they serve different purposes, with bespoke DSPs being preferred when workflow and complete automation of OOH specifically really matters most.

7 Postcard from the future question: From a tech perspective, what do you think **the pDOOH space is going to look like in 5 years?**

I predict that we'll see more fluidity in digital budgets to include pdooh as a digital channel, with a better understanding amongst all the new players who've uncovered OOH in recent years through Pdooh of OOH strengths, with appropriate value placed on those strengths. We'll see much more consolidation of workflows on both the buy side and the sell side, allowing publishers to truly effectively manage yield across their entire networks and selling channels seamlessly, and streamlined and efficient planning & execution workflows on the buy side with much less manual back & forth.

8 What **percentage of deals** are you seeing come through PMPs? Where do we see that going?

About 20% overall right now are private deals. Open exchange favors ease of discoverability of inventory by media buyers across our entire global ecosystem of connected DSPs (to our SSP) and in many cases serves as a mechanism for buyers & sellers to become acquainted through persistent transactions and that's often when things move to PMPs.

9 How can DOOH **enhance the customer experience?**

Investing in education is a big one and certainly in high demand as both media owners and buyers seek to adapt their organizations and people around what the tech now enables. Technology doesn't replace service, but the service offering is evolving in its planning and delivery mechanisms, so educating all stakeholders across the industry is key to enhancing the overall customer experience.

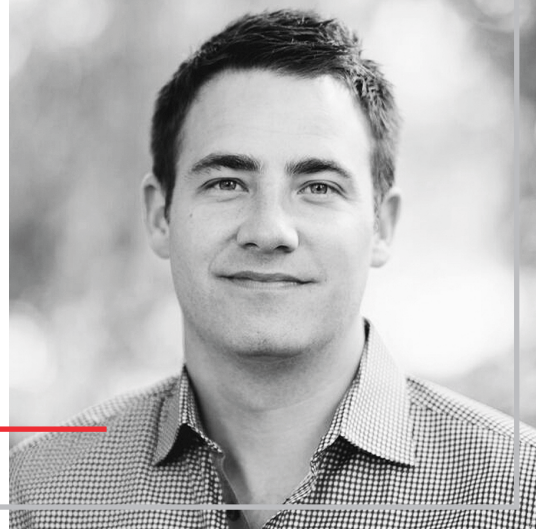
10 How do they see **omnichannel measurement** playing out on each of their platforms?

We work in close collaboration with our partners to facilitate an agnostic approach to omnichannel measurement by providing flexible reporting options that can be easily exported and ingested into other platforms.

providing **flexible**
reporting options

Scott Mitchell

Vistar, Managing Director, Canada



1 How are you **dealing with data degradation** that will no doubt be happening with their mobile data providers due to the **enhanced privacy measures by Apple and Google**; especially in terms of offline to online/foot traffic attribution.

Vistar hasn't seen a major data scale reduction via our location partners following any of the recent privacy changes. Most partners saw a limited drop in scale, and we expect those numbers to bounce back over time as more people opt back in to location services and partners work to continue to add new publishers. Looking ahead longer term, there is an opportunity for DOOH to emphasize the targeting capabilities available based on the real-world contexts of the media that are not available in the online world.

12 As an industry **what should we keep doing, stop doing and do more of?**

We need to keep developing solutions that make it easier for marketers to track the impact of OOH advertising to real metrics that matter, based on sound measurement methodology. Solutions need to use actual campaign exposure and tie to the marketing KPIs brands care about, not simply to OOH-specific delivery or channel metrics.

13 Can **programmatic DOOH** help clients to generate campaign scale?

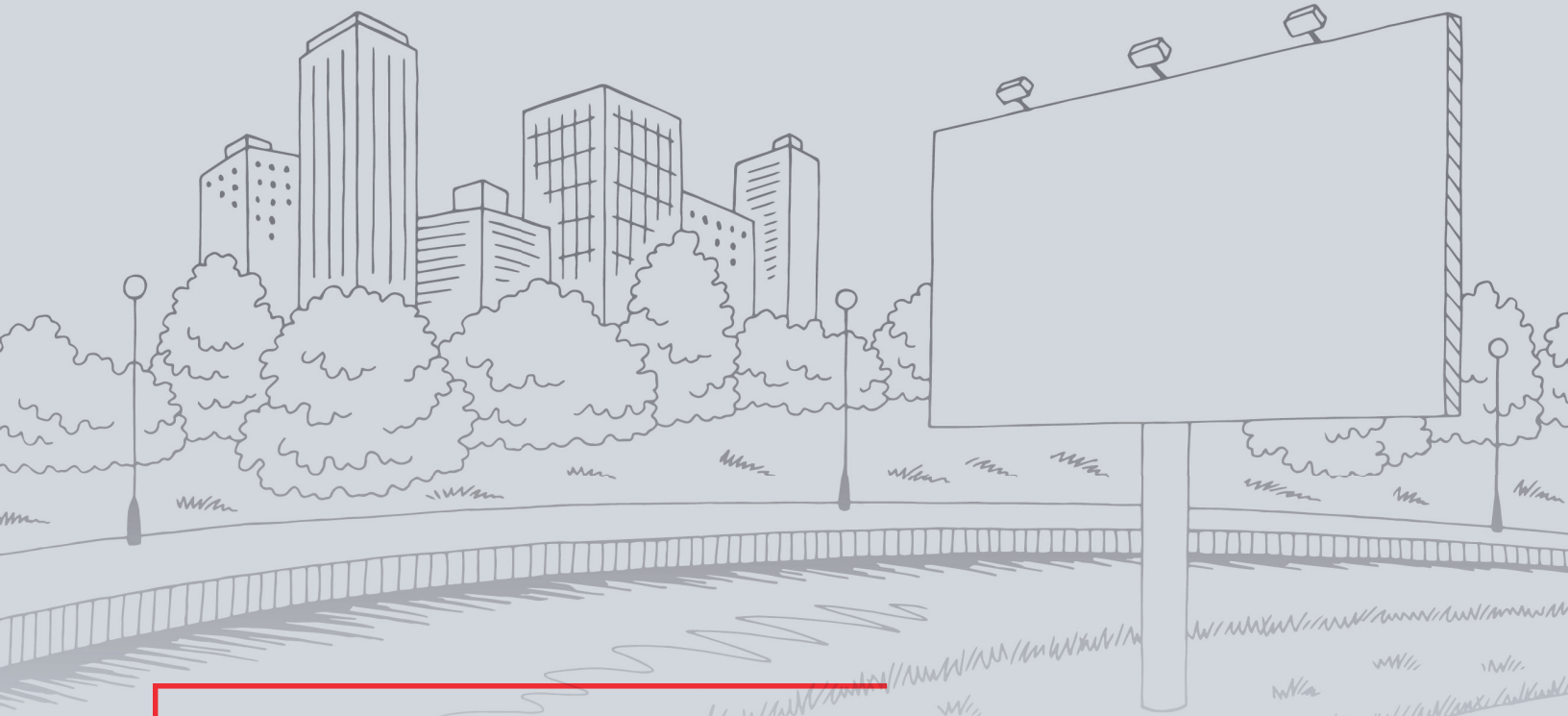
By taking an audience-first approach to running campaigns across multiple networks, marketers naturally unlock scale by allowing the data to evaluate every possible piece of inventory rather than looking at a limited subset.

Programmatic also allows brands to easily optimize campaigns by shifting budgets, heavy-ing up in key areas or adding in incremental extensions to campaigns based on performance.

14 How do they see **omnichannel measurement** playing out on each of their platforms

The ability to prove ROI is critical for bringing net-new clients into the OOH space, and it's important to responsibly align OOH results to the metrics marketers use to evaluate other channels of media without losing sight of what makes OOH unique. There's still significant work to be done in standardizing how we measure OOH in order to showcase the effectiveness of the channel to digital buyers, but there already today are true exposure-based solutions that allow advertisers to see the direct impact of campaigns.

Thank You!



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