

JCDecaux

# PROGRAMMATIC DOOH PLAYBOOK



# Table of Content

<b>1 The evolution of OOH</b>	3	<b>5 JCDecaux PROGRAMMATIC</b>	22
1.1 The last broadcast medium	4	5.1. Dedicated supply	23
1.2 Digitalization of OOH	5	5.2. Deal types	24
1.3 About JCDecaux	7	5.3. VIOOH SSP	25
1.4 JCDecaux Norway	8	5.4. The programmatic supply chain	26
<b>2 Programmatic in Norway</b>	10	5.5. Available DSPs in Norway	27
<b>3 Audience</b>	13	5.6. Available DSPs globally	28
3.1 A "one-to-many" channel	13	5.7. Tactical and brand building objectives	29
3.2 Industry standards	15	5.8. Pricing structure	31
<b>4 A clean currency</b>	16	<b>6 Trading programmatically with JCDecaux</b>	32
4.1 VAC = Viewed Impressions	17	6.1. Briefing and deal set-up	33
4.2 Data sources	18	6.2. Tailored campaigns	34
4.3 Calculation of Viewed Impressions	19	6.3. Creative specifications	35
4.4 Programmatic OOH combined with other channels	21	6.4. Campaign reporting	36
		<b>7 The JCDecaux difference</b>	37
		<b>8 Contact information</b>	38
		<b>9 Glossary</b>	39







# 01.

## The evolution of OOH



## 1.1 | The last broadcast medium

**What is often referred to as the world's oldest media channel - Out of Home, or outdoor - has undergone an enormous transformation in the last 10-15 years. The share of the total media market allocated to Out of Home has increased considerably both in Norway and internationally. There are three main reasons for this:**

- 1) Out of Home has as one of its main strengths in the ability to deliver rapid and effective reach. At the same time help advertisers activate their audience and stimulate to action.
- 2) The out of home channel builds brands. Research on communication effects shows the importance of prioritizing the long-term effort of priming consumers with positive associations towards a brand. The Out of Home channel has a unique ability to create expectations - one of the main ingredients in this long-term work.
- 3) The ability the out of home channel has to develop and renew itself. Digitalization, new and more precise audience data and the development of new sales and planning tools are key words in this context.



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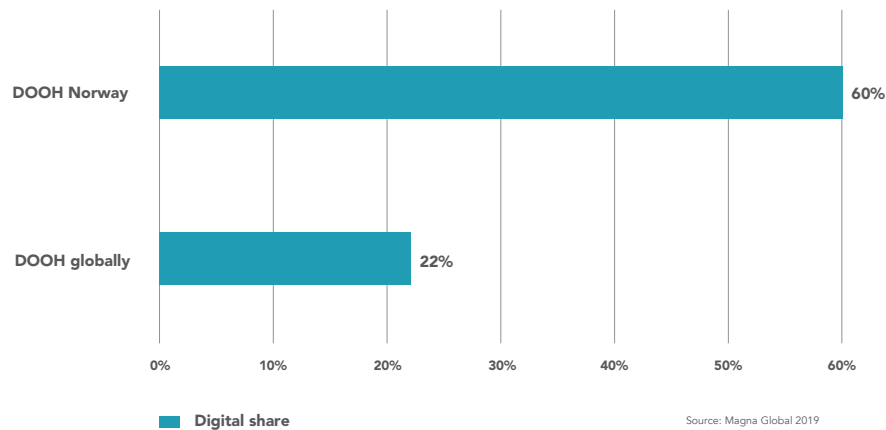
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# 01 The evolution of OOH

## 1.2 | Digitalization of OOH

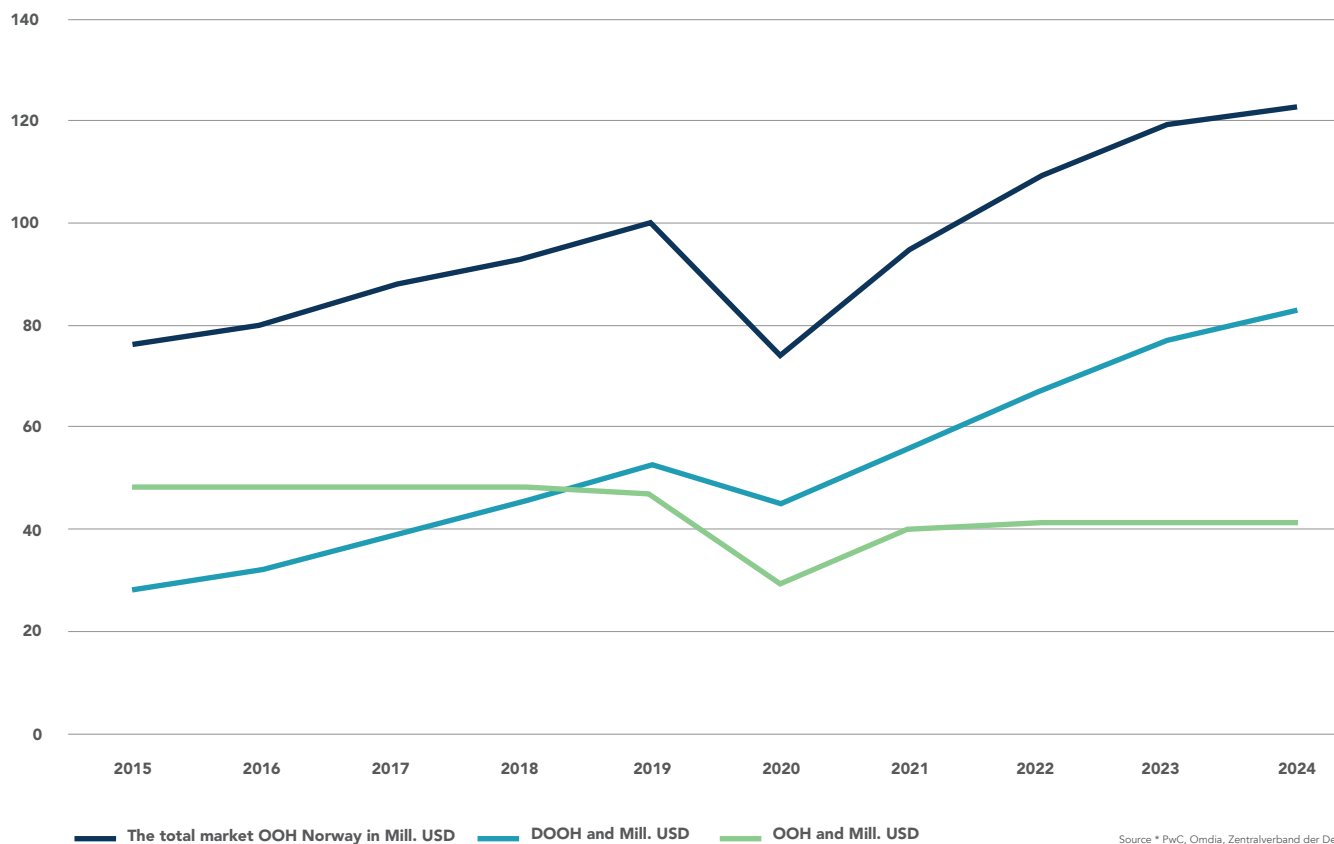
An increasing proportion of classic advertising inventory has been replaced by new digital installations. JCDecaux has digitalized public transport hubs, shopping malls and other popular locations in the cityscape that has a large footfall. JCDecaux can target more than 30% of Norway's population with digital advertising in one week. In Oslo, advertisers can target about 60% of the population with digital and relevant messages every single week.

**In Norway, DOOH (Digital Out of Home) already accounts for over 60% of total revenues. This makes us one of the most modern and digital outdoor advertising markets in the world.**



# 01 The evolution of OOH

Digitalization is also increasing flexibility, which in turn gives advertisers more opportunities. Advertisers can now be more focused and relevant in their communication with the target audience than ever before. Development, opportunities for more detailed campaign planning and the contribution of programmatic trading means that PwC estimates that the digital share in Norway will increase to 67% \* in 2024.

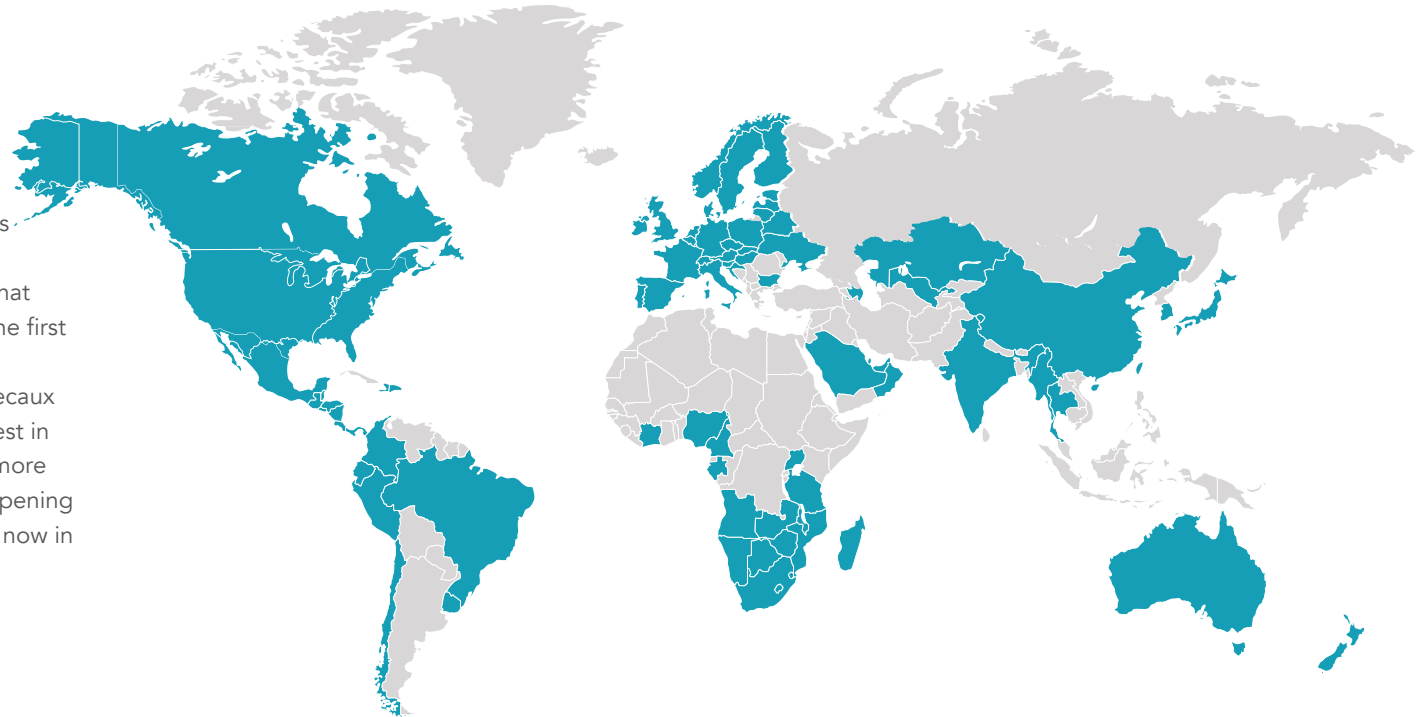


### 1.3 | About JCDcaux

For almost 60 years, JCDecaux has played an important role in shaping the cityscape in a number of countries around the world. Today, we are by far the world's largest outdoor advertising company, with over 1 million advertising panels in more than 80 countries on five continents.

JCDecaux is the number one outdoor advertising company that makes the biggest investments in quality products and innovation.

Jean-Claude Decaux proved that he was willing to invest when he first introduced ad-financed urban furniture in 1964. Today, JCDecaux is still willing to invest and invest in making out of home an even more important media channel by opening up for programmatic trading - now in Norway as well.





## 1.4 | JCDecaux Norway

JCDecaux Norway was founded in 1998, and quickly became a leading player in the Norwegian market. JCDecaux brought the concept of ad-financed street furniture to Norway. By focusing on its core values: Design, service and maintenance, quality and innovation. JCDecaux has contributed greatly to the rapid development of the Norwegian out of home market. In fact the Norwegian market has been developing faster than most other markets in Europe during the same period.



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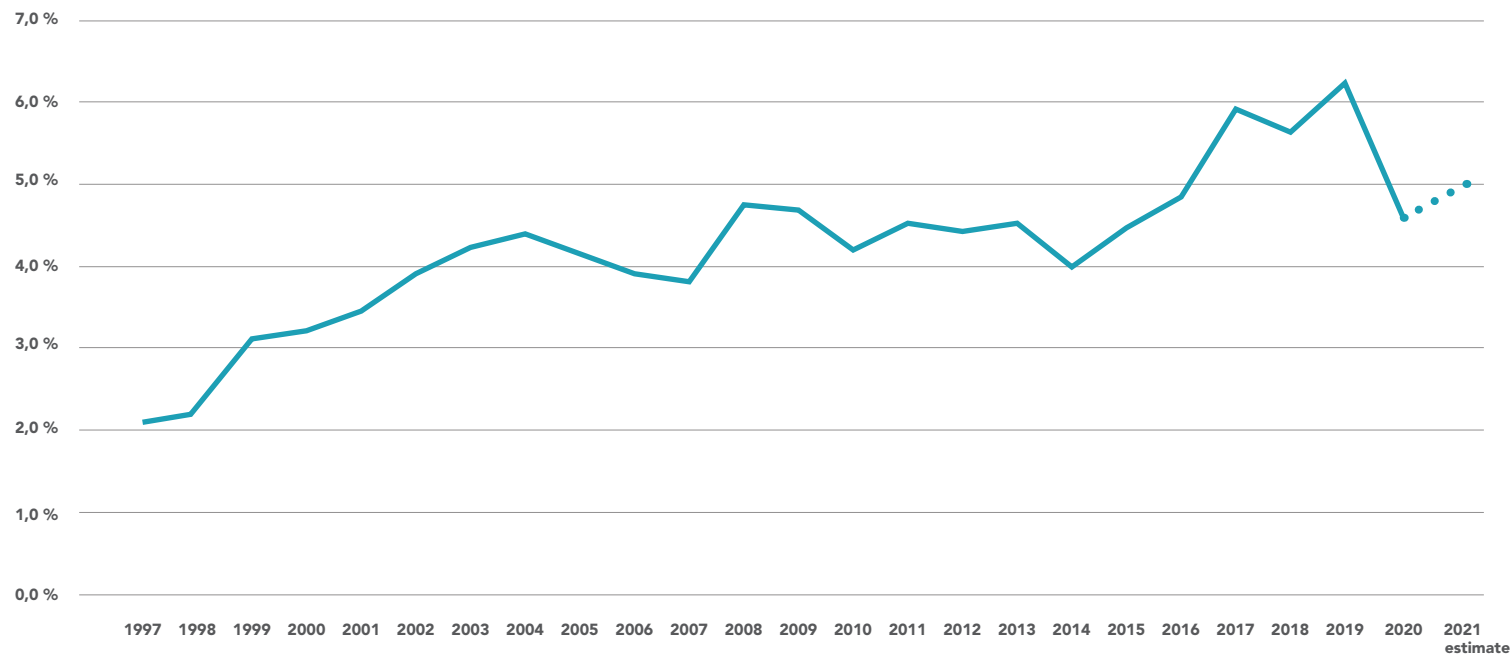
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## OOH share of the Norwegian media market



Source: Media Agency Association

Today, JCDecaux offers advertisers high-quality advertising space in arenas such as shopping malls, train stations, roadside and in the cityscape where there is a significant audience present. Out of Home is a "one-to-many" channel. We are able to target a large audience rapidly, over a large geographical area, and are consequently one of the most efficient reach generating media channels in the Norwegian market.

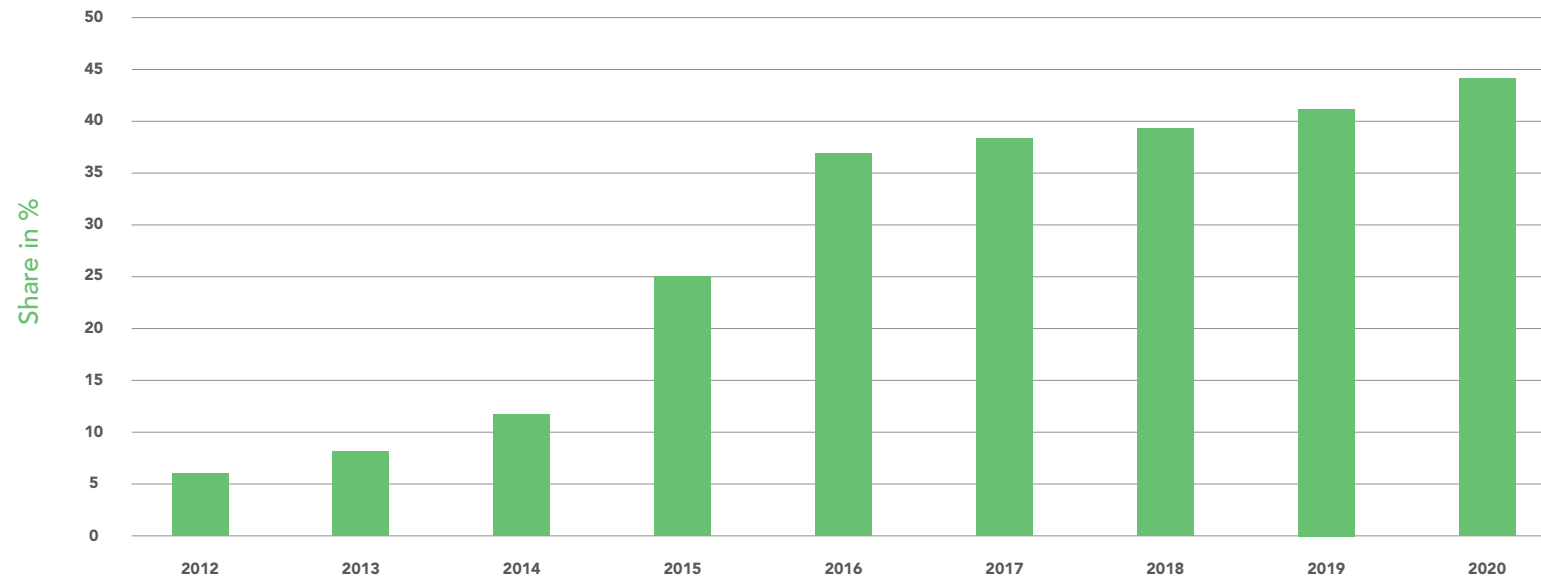


02.

Programmatic  
in Norway

When programmatic trading was first launched in Norway around 2012, this opportunity was quickly adopted by Norwegian advertisers and media agencies. The share of programmatic media purchases on the Internet (excluding SOME and Search) at an early point accounted for a significant part of the total digital turnover. Since 2016, it has been stable at around 40%.

### Share of total digital revenue (e.g. SOME and SEARCH)



Source:  
2012-2016 – Delta Project. «The State of Programmatic in Norway»  
2017 – JCDcaux est.  
2018 –2020 - Media Agency Association



Programmatic growth has been greater than the general digital growth in recent years. Recently, however, growth has leveled off somewhat because advertisers at times experience a lack of available inventory. The audience generated by i.a. online video from Norwegian publishers is sold before this inventory is made available for programmatic trading.

When JCDecaux now offers programmatic digital out of home significant quantities of long-awaited availability will be added to the programmatic marketplace in Norway. To ensure availability, JCDecaux will dedicate apart of the digital inventory for such purchases - a minimum of 5% of the total inventory (see Chapter 5). Norwegian advertisers will therefore most likely always have available digital inventory. Either for programmatic short term tactical and / or brand-building communication.

Internationally, the share of programmatic, of total DOOH sales, is expected to increase significantly in the coming years. In Germany, which is considered one of the pioneering countries in this area of business, it is expected that the programmatic share will surpass 1/3 of the total turnover of DOOH in a few years.

[www.walldecaux.de/das-programmatic-playbook-out-home](http://www.walldecaux.de/das-programmatic-playbook-out-home)





# 03.

## Audience



### 3.1 | A one-to-many medium

The term "one to many" medium means that every single ad play on one of our advertising panels reaches multiple people. Door traffic counters, audience counts and advanced modeling give us detailed knowledge of how many people visit our digital arenas per. hour. Furthermore, beacons, mounted on all our digital installations, communicate with a large selection of apps on the phones of the visitors. This gives us detailed knowledge of the footfall and demographics of the audience that passes all our panels per. hour. The audience measurement is 100% GDPR compliant. The audience size of an individual Out-of-Home ad play varies by screen, location and time. Reflecting this, there is no 'standard' impression multiplier. A unique impression multiplier is associated with every ad play reflecting the unique audience composition, at the specific time of traded play.

The fact that the outdoor channel communicates to many people at the same time is considered one of its biggest strengths. We know that people often discuss products they have seen on outdoor advertising panels. This type of word-of-mouth reinforces the recall and attention of the campaign.





## 3.2 | Industry standard

Outdoor Impact (OI) is the industry standard for measuring OOH in Norway. OI is administered by the media owners JCDecaux, Clear Channel and Ocean Outdoor. In addition the Media Agency Association and the Advertisers Association (ANFO) is represented in the Joint industry committee. The method used in Norway is a globally recognized standard and is used in England, Ireland, Australia, Turkey, Sweden and Finland, among others. The purpose of the survey is to be able to say something accurate about the proportion of the population, broken down into defined target groups, in certain geographical areas that an advertiser seeks when he buys our advertising space. In order to be able to make these calculations of reach and frequency, we need to know how many people actually look at the advertising on all our advertising surfaces. These calculations are made in OI:

**1** The first step in this study is that all advertising panels is registered and classified in a database. Everything that is relevant to the audience value is registered. The size of the advertising panel, lighting, location in relation to audience flows, etc. All advertising panels are assigned a gross audience value, this is often referred to as flow. This flow is set by obtaining traffic numbers (AADT) on the road by which the advertising panels is located, the amount of visitors at the shopping center, the total amount of passengers at the train / metro station and registrations of passing pedestrians, cyclists, etc.

**2** The next step in the study is to define how many people are moving in a direction that allows them to actually see the advertising surface. The fact that they drive in the right direction, sit on the right side of the car / bus, etc. When you have taken into consideration all these reduction factors on all panels you end up with a net audience value per. panel. This is what we refer to as OTS (Opportunity to see).

**3** The last step in the survey is to define a net-net audience value on all advertising panels. The basis for this reduction is internationally recognized visibility studies on both classic and digital advertising panels. These studies of visibility show how people observe the environment. How the eyes move, and how long we observe objects around us on average. What we end up with is a accurate estimate of how many people actually see every single advertisement on our installations. This is our currency and we have named it Visibility Adjusted Contacts (VAC).

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# 04.

A clean  
currency

## 4.1 | VAC = Viewed Impressions

VAC (Visibility Adjusted Contacts) is a currency that we have used ever since we launched OI in Norway in the early 2000s. We have chosen to keep this pure currency as we now take the step into the programmatic sphere. Why do we do this, when we know we'll face competing channels that sell exposures at an OTS level?

Advertisers and professional media buyers know that not all the impressions they pay for when they advertise in e.g. an online newspaper or on mobile is seen. They pay for an audience that may only have the opportunity to see part of the advertisement for a very short period of time. We know that advertisers are not happy with this. Therefore we have chosen to keep our pure and moderate currency as we open our programmatic business. This way we charge only for those who have actually seen the ad on one of our advertising panels.



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## 4.2 | Data sources

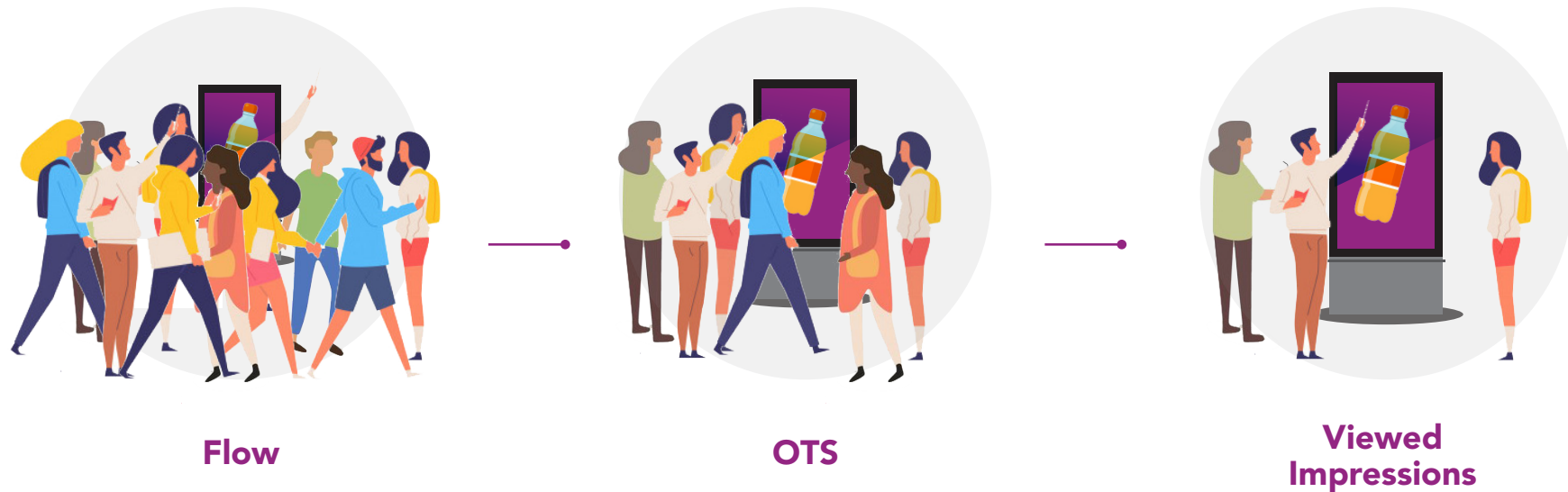
As we continue the digitalization of the buying process we have added more sources and more precise data that in total provide advertisers with the opportunity to buy impressions on our panels even more precisely. We use the following data sources:

- LASER COUNTERS AT ALL SHOPPING CENTERS
- PASSENGER DATA
- ROAD TRAFFIC DATA
- SENSOR DATA ON ALL ADVERTISING PANELS



### 4.3 | Calculation of Viewed Impressions

Using the sources mentioned, we allocate the correct audience number to each individual screen at all times. With the same factors as in Outdoor Impact, we have reduced the total audience of each screen (flow) down to a realistic opportunity to see (OTS) and then further down to how many people have actually seen the individual ad (Viewed Impressions).



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With in-depth knowledge of the audience per. panel per hour combined with the ability to leverage the flexibility of programmatic buying. Advertisers are now able to communicate with their target audience in a more relevant way. I.e. OOH audience is peaking at times of the day when other media channels might be low. We are physically present at brand-building locations or close to the time of purchase, which makes it possible to pinpoint communication either linguistically or visually in these places.

Train station visitors everyday vs. weekend (Lillestrøm Station)





## 4.4 | Programmatic OOH combined with other channels

The main communication objective for most advertisers is:

- To Increase traffic to the advertiser's websites
- To increase awareness of a brand
- To drive sales
- Brand Building

OOH can play a role in all phases of the work towards achieving these objectives . Whether it is by reinforcing the positive expectations of a brand, or by communicating through panels in proximity to the point of purchase. However like all other media channels, OOH also has its weaknesses.

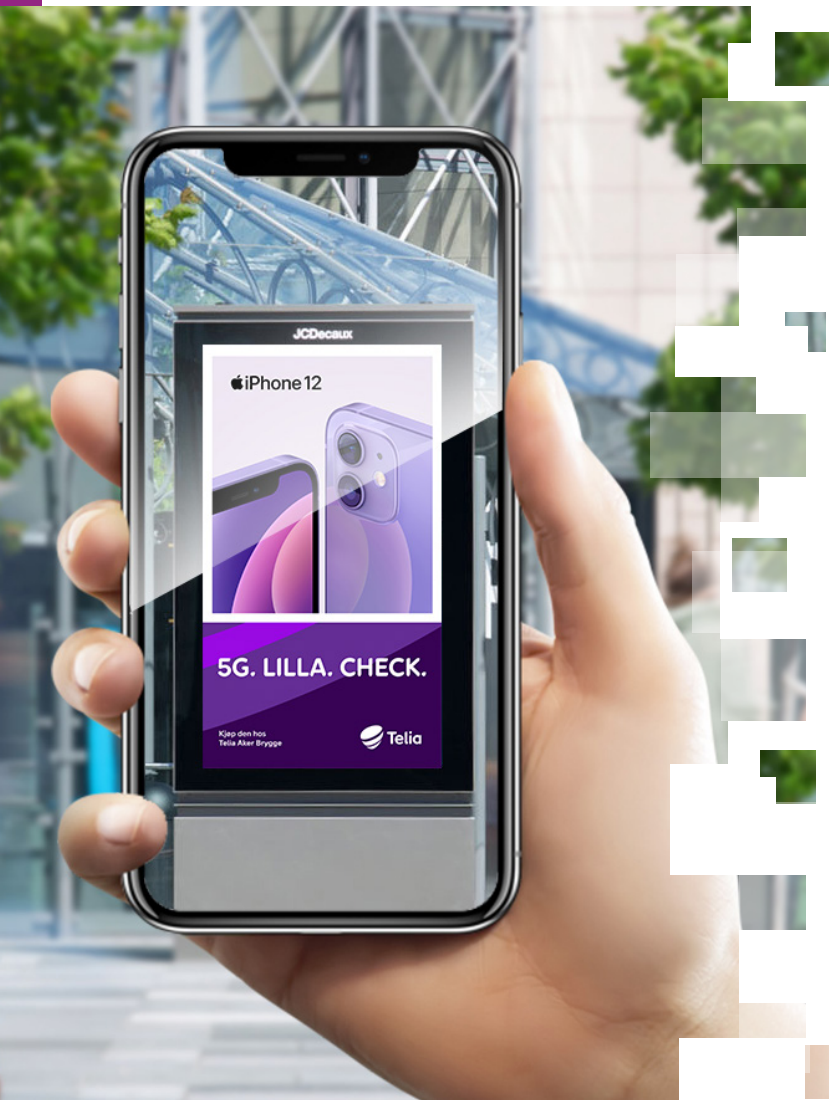
The most effective strategy for an advertiser is therefore to choose a multi-channel approach finding a combination of channels that will reinforce and complement each other.

OOH and mobile advertising is a great example of such a powerful multi channel combination. Advertisers both in Norway and internationally have recognized the opportunities and synergies that Mobile and OOH can provide together. A powerful "one to many" channel in combination with a powerful "one to one" channel. OOH that in a natural way are able to create great impact and expectation in a large audience - in public. And then in combination with mobile that allows the audience to respond to the message immediately - in private on a handheld device.

Sources:

[www.jcdecaux.com/press-releases/p2-c-5-new-winning-formula-media-planning](http://www.jcdecaux.com/press-releases/p2-c-5-new-winning-formula-media-planning)

[www.s4m.io/jcdecaux-and-s4m-announce-a-global-advertising-partnership-enhancing-media-efficiency-and-synergies-between-ooh-and-mobile/](http://www.s4m.io/jcdecaux-and-s4m-announce-a-global-advertising-partnership-enhancing-media-efficiency-and-synergies-between-ooh-and-mobile/)



Mobile and  
Programmatic OOH

*Scan  
to watch films*



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**05.**

**JCDecaux  
programmatic**

## 5.1 | Dedicated supply: premium only, not remnant inventory

When you buy OOH programmatically from JCDecaux, one of the great strengths is that all supply is premium inventory. JCDecaux only has digital advertising panels of the highest quality in the portfolio. All panels are optimally located in crowded areas with great visibility.

At JCDecaux have decided to dedicate at least five percent of the total share of time across all our networks for programmatic campaigns. This way we want to minimize any concern that there might not be supply available when you as an advertiser want to use us as part of the media mix.

**Available formats as of October 2021:**





# 05 JCDecaux programmatic

## 5.2 | Deal types

Initially, JCDecaux will only be trading inventory within a private marketplace (PMP) with client-specific deals. This ensures that we know our advertisers and they know exactly what they are buying. JCDecaux will work closely with advertisers and agencies to drive positive outcomes for each campaign as we embark on a programmatic journey together.

We will offer Programmatic Guaranteed, Non Guaranteed and Always On deals.

Trading will end one hour prior to play. All auctions are fixed or first price auctions.



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### 5.3 | VIOOH SSP

# VIOOH

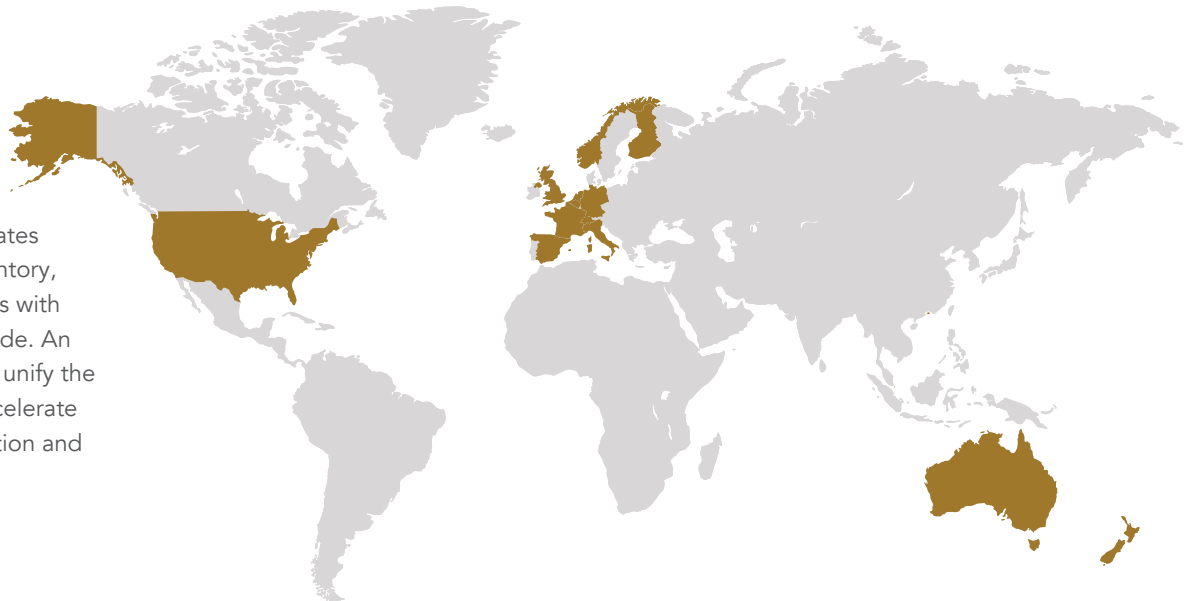
VIOOH is a global supply-side platform (SSP) and JCDecaux Norway's exclusive SSP.

VIOOH's purpose-built SSP technology automates the planning and trading of Out-of-Home inventory, enabling programmatic trading via partnerships with over 30 demand-side platforms (DSPs) worldwide. An independent platform, VIOOH's ambition is to unify the Out-of-Home advertising industry and help accelerate transformation of the channel through automation and programmatic trading of Digital Out-of-Home.

Maximum  
flexibility

Global  
access

Zero buy-side  
commission



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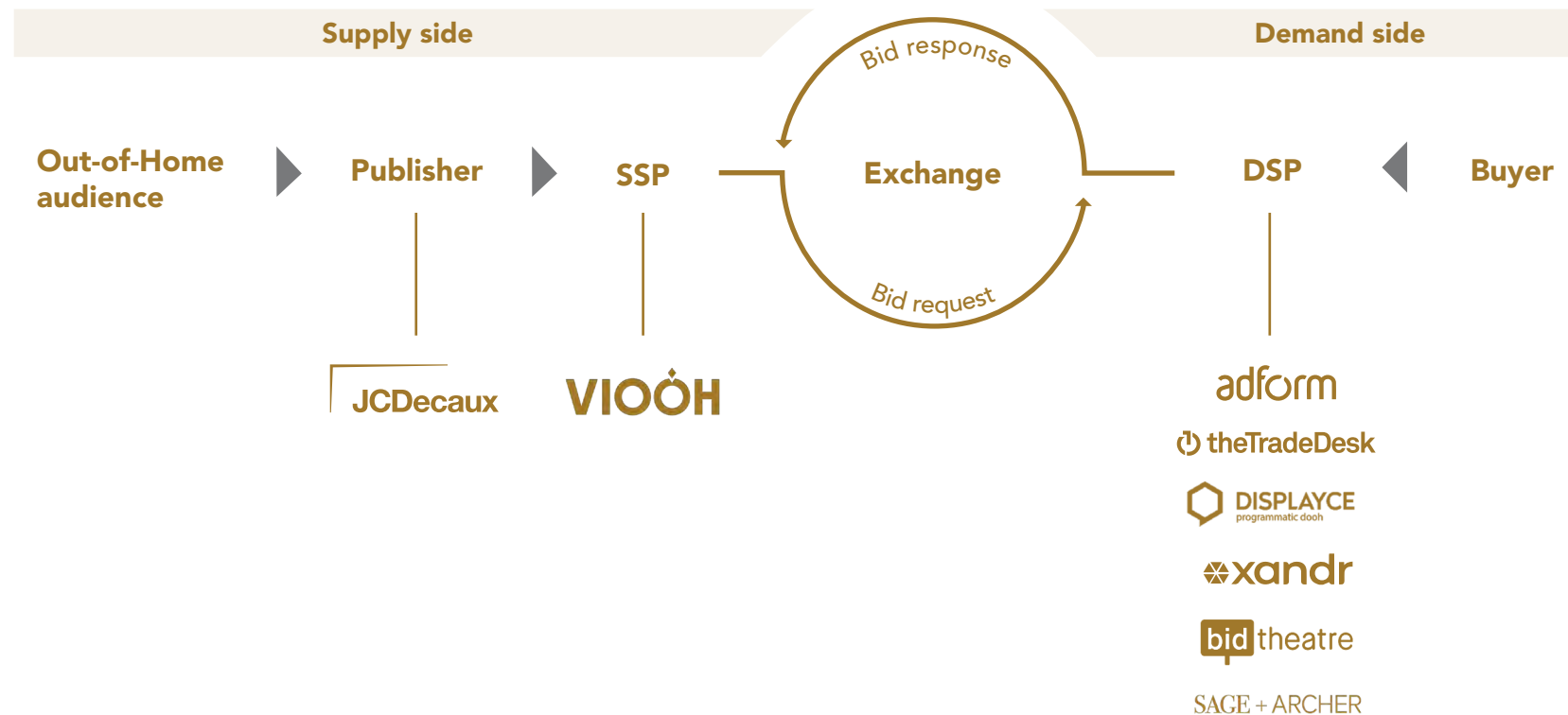
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## 5.4 | The programmatic supply chain





## 5.5 | Available DSPs in Norway - November 2022

Ready to trade

adform

theTradeDesk

DISPLAYCE  
programmatic dooh

xandr

bid theatre

SAGE + ARCHER



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## 5.6 | Available DSPs globally

Global integrations					
 Hivestack	 atedra	Flow City	 PLADWAY	 DISPLAYCE programmatic dooh	<i>Talon</i>
VISTAR MEDIA	 PLATFORM 161	MediaMath	 ubimo a Quotient Brand	Splicky Smooth Multichannel Advertising	MediaMath
verizon media	 Active Agent	 The Neuron Intelligent Connections	 LEMMA	scoota.	 TAPTAP
 theTradeDesk	 xandr	 RTB MARKET	 TABMO CREATIVE MOBILE DSP	 AdQuick	 TPS engage
S4M	adform	 blip	SAGE + ARCHER	 OutMoove	
Integrations in progress					
 MW	 ADELPHIC BY VIART	AMOBEE	 ADOMNI	 Display & Video 360	

## 5.7 | Tactical and brand building objectives

Through JCDecaux's programmatic inventory, advertisers can design both brand-building and sales oriented campaigns. We can deliver great coverage and reach. But we can also deliver strong impact zones that are great for creating fame and brand awareness.

### Point of purchase and great reach combined

More than half of the digital advertising panels in JCDecaux's programmatic portfolio is located in shopping centers close to the point of purchase or in close proximity to the shopping situation. Norway is an elongated country and the shopping malls is a strong focal point throughout the country. Therefore, one can communicate effectively with a broad target group through this distribution.

### Impact

Key locations such as this one at Aker Brygge deliver Impact and a unique presence in the Oslo City Center. Premium locations and zones like this stand out and are found in more and more cities in Norway.

In areas where JCDecaux have multiple panels that can be seen simultaneously, we have synchronized these in so called Visual Units. This means that content on screens that are next to each other will always be in sync. The result is an enhanced sense of impact and dominance when you are in an area with many digital panels.



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Commuter



Shopping



Street Furniture

## 5.8 | Pricing structure

Guaranteed Deals	Number of panels total per arena	Monthly Impressions pr arena **	1 mill Impressions	5 mill Impressions	10 mill Impressions
<b>Arena</b>			CPM NOK*	CPM NOK*	CPM NOK*
Commuter	97 at 12 train stations	326,5 mill.	From 150	From 90	From 75
Shopping	336 at 59 shopping centers	162,7 mill.	From 210	From 140	From 125
Street Furniture	50 panels in 4 cities	33,4 mill.	From 250	From 160	From 130

Non Guaranteed Deals	Number of screens total per arena	Monthly Impressions pr arena **	1 mill Impressions
<b>Arena</b>			CPM NOK*
Commuter	97 panels at 12 train stations	326,5 mill.	From 150
Shopping	336 panels at 59 shopping centers	162,7 mill.	From 210
Street Furniture	50 panels in 4 cities	33,4 mill.	From 250

**Premiums**

1. Basic Targeting (Daypart/Location)	10%
2. Complex targeting (Proximity Demographic)	20%

\*Floor CPMnivå Q4 2021

\*\*Monthly Impressions All15 + Outdoor Impact





# 06.

**Trading  
programmatically  
with JCDecaux**



## 6.1 | Briefing and deal set up

1	Brief JCDecaux	2	Response	3	Deal set up	4	Creative upload	5	Campaign live
	<ul style="list-style-type: none"> <li>• Advertiser</li> <li>• Category</li> <li>• Agency and/or Trading Desk</li> <li>• Campaign timing</li> <li>• Market</li> <li>• Budget</li> <li>• Fixed or Floor CPM</li> <li>• Campaign objectives</li> <li>• Target audience</li> <li>• Formats</li> <li>• POI eller proximity requests</li> </ul>		Tailored brief response supplied with recommended locations		Client confirms deal. JCDecaux issues <u>Deal ID</u> to buyer.		Creative solution is uploaded via DSP with its own Creative ID which is linked to Deal ID. All creative solutions must be approved by JCDecaux before publication		Bid requests sent per deal parameters. Bidding to commence.



## 6.2 | Tailored campaigns

### We offer two types of deals

- Programmatic Guaranteed with pre defined targeting
- Programmatic Non-guaranteed unreserved fixed or first price

### Guaranteed deals

**A guaranteed deal contains the following information:**

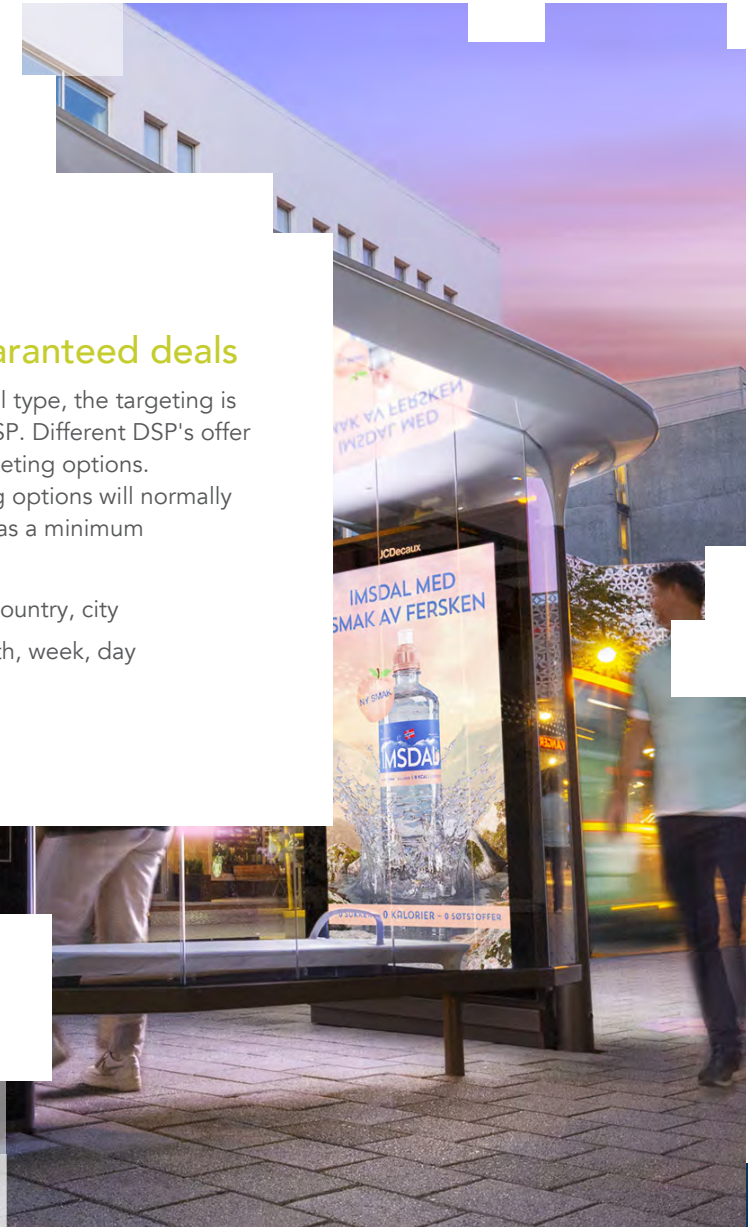
- Location: Country, city
- Time: Month, week, day or hour
- Arena; Shopping, Streets Furniture and Commuter
- Pretargeting: POI
- Demographics

This deal type does not allow advertisers to add additional targeting via DSP. The panels and number of impressions are pre-selected for your campaign at a fixed price. You are guaranteed that 100% of all impressions will be delivered.

### Non-guaranteed deals

With this deal type, the targeting is applied in DSP. Different DSP's offer different targeting options. The following options will normally be available as a minimum

- Location: Country, city
- Time: Month, week, day



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## 6.3 | Creative specifications

### Upload to DSP

The creative solutions are uploaded to DSP with Creative IDs that are connected to Deal ID. JCDecaux will strive for rapid approval and confirmation of uploaded material.

### File types

MP4 10 sec. video either motion or static  
30 MB Max file size, FPS 25

### Compliance

Advertisers must comply with the authorities', both central and local, requirements for creative content. In Norway, this mainly applies to the general ban on gambling, tobacco and alcohol advertising. Advertisers must also comply with specific guidelines set by our design providers. More detailed information is provided on request.



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### 6.4 | Campaign reporting

JCDecaux and VIOOH provides the DSP with the following metrics:

- Frame ID (Unique Screen ID)
- GPS-location: Latitude and longitude
- Environment
- Format
- Size and dimension of screen
- Impressions
- Plays
- Spend
- Time of payout at hourly level



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# 07.

## The JCDecaux difference



Only Premium Inventory



National coverage



The most powerful outdoor arenas



Supply guarantee



Private marketplace



Data driven planning



Time targeting



Global DSP-integrations



Campaign-reporting



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# 08.

## Contact information

### Contact:



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VIOOH  
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Outdoor Impact  
[www.outdoorimpact.no](http://www.outdoorimpact.no)



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# 09.

## Glossary

<b>CPM</b>	The cost to deliver a thousand Viewed Impressions of your ad
<b>Deal ID</b>	A unique ID assigned to a specific deal that confirms certain parameters agreed upon between the buyer and seller. This includes CPM rates, formats, panels, locations and other variables.
<b>Demand-side Platform (DSP)</b>	A technology platform advertisers and media agencies use to coordinate media purchases from several sources and which provides access to "RTB traffic" or Private Marketplaces (PMPs).
<b>Impression multiplier</b>	The multiplier is an Out-of-Home specific metric which informs the buyer exactly how many impressions are delivered in a single ad play. Each impression equates to one contact or viewer. One bid request will account for one ad play, therefore the multiplier will highlight how many impressions are included per bid request.
<b>Supply guarantee</b>	JCDecaux will set aside at least 5% digital screen time for programmatic campaigns across all our connected digital advertising panels
<b>Non-guaranteed</b>	A type of programmatic deal where the inventory is not reserved and the budget is flexible.
<b>Private Marketplace (PMP)</b>	A programmatic advertising marketplace where advertisers are invited by media owners to buy specific inventory in real-time. Data is regularly used by media owners to provide bespoke recommendations for advertisers. This is the main differentiation between a private marketplace and open auction environment.
<b>Supply-side Platform (SSP)</b>	A platform which media owners use to manage, optimize and sell their inventory.. SSPs use an exchange to connect media owners to media buyers via DSP integrations. VIOOH is JCDecaux Norway's exclusive SSP.
<b>Visual Units</b>	A collection of screens that are synchronized. One ad is played on all the connected panels at the same time, often within a viewable area line a shopping centre, train stations where several screens are visible at the same time.



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**JCDecaux**  
PROGRAMMATIC