

Digital Out-of-Home

The Quarterly Report
Scale, Reach and Viewed Impressions



A Digital Transformation

In Q1 2018, **DIGITAL** accounted for 47% of total Out-of-Home (OOH) revenue. This is predicted to surpass the 50% threshold by the end of the year.

Growth in **DIGITAL** is fuelled by the continued expansion of inventory, new technology and innovative creative.

Combining the reach and impact of **DIGITAL** with its flexibility and accountability makes it an exciting proposition for brands.

Advertisers can now achieve **62% weekly cover of UK adults** using **DIGITAL** Out-of-Home (DOOH) alone.

Digital Out-of-Home



1.7 BILLION

weekly viewed impressions.

The Right Impression

SO WHAT'S THE DIFFERENCE BETWEEN 'SERVED' AND 'VIEWED'?

A served impression simply means a system has been instructed to deliver an advert. As long as the delivery is registered, it's counted as an impression - regardless of what happens next. The ad could appear 'below the fold' of a web page. A user could visit a web page but leave before the ad has even rendered. In short, the ad might be served without anyone ever seeing it.

VIEWED IMPRESSIONS are defined as the number of eyeballs that make contact with an advert. Delivery is measured and accountable - people see the ads they're supposed to see.

OOH Accountability

The OOH industry only measures ads that have been '**VIEWED**', using the Route audience measurement system that is governed by a Joint Industry Committee (JIC).

'Eyes on' ad copy rather than an opportunity to see. OOH measurement only counts **REAL PEOPLE**, and only those who live in the UK (aged 15+).

DOOH Reach by Sector

Digital, data and advancing technology are transforming OOH into a dynamic, innovative and interactive advertising medium.

DOOH ensures ever-increasing reach and scale. It also provides limitless creative scope for targeting audiences on the move.

Roadside

31%
STREET FURNITURE

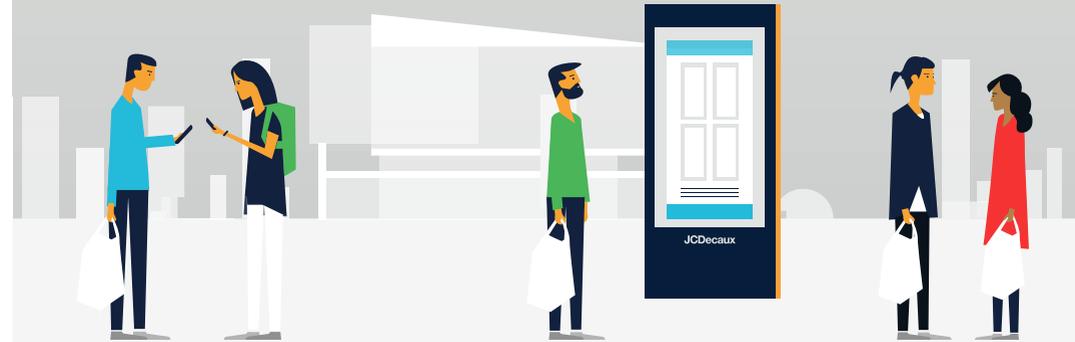
32%
BILLBOARDS



Retail

25%
SUPERMARKETS

9%
MALLS



Transport

10%
RAIL

6%
TUBE

3%
TAXIS

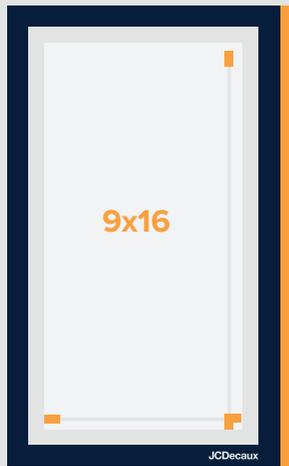
0.3%
AIRPORTS



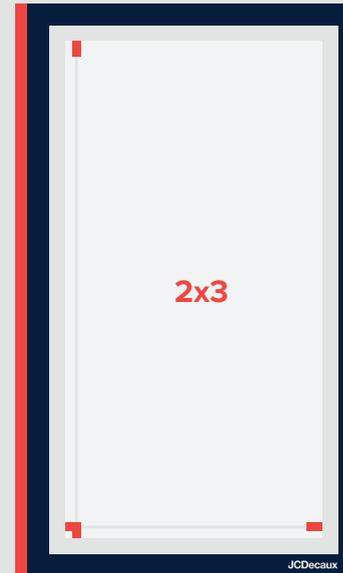
Source: Route 27. All adults, one week

High Simplicity High Impact

Just four different ASPECT RATIOS generate 96% of all weekly viewed impressions. 73% of these viewed impressions are delivered from animated copy.



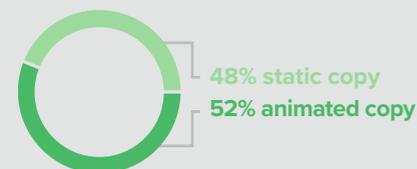
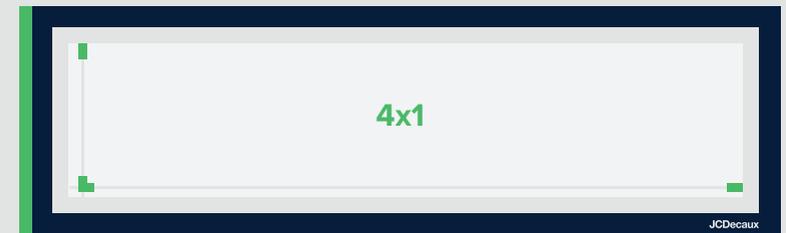
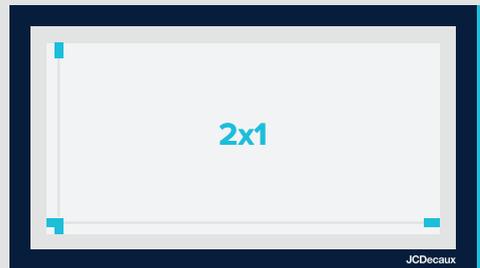
= 53%
OF WEEKLY VIEWED
IMPRESSIONS



= 15%
OF WEEKLY VIEWED
IMPRESSIONS

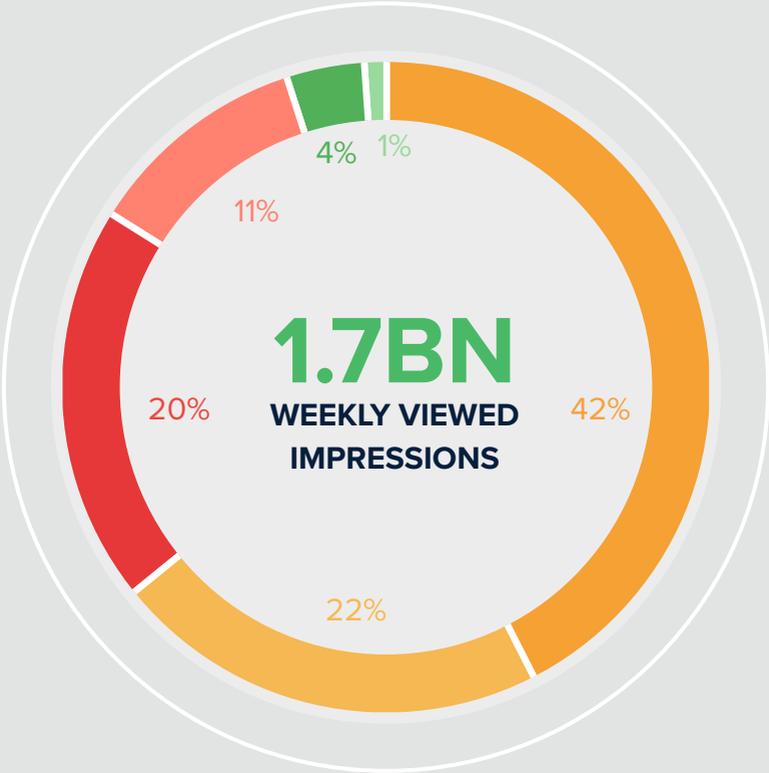
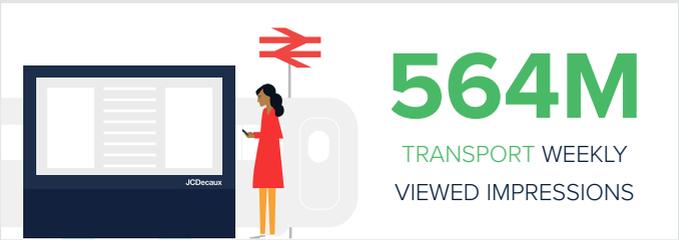


20% =
OF WEEKLY VIEWED
IMPRESSIONS



= 8%
OF WEEKLY VIEWED
IMPRESSIONS

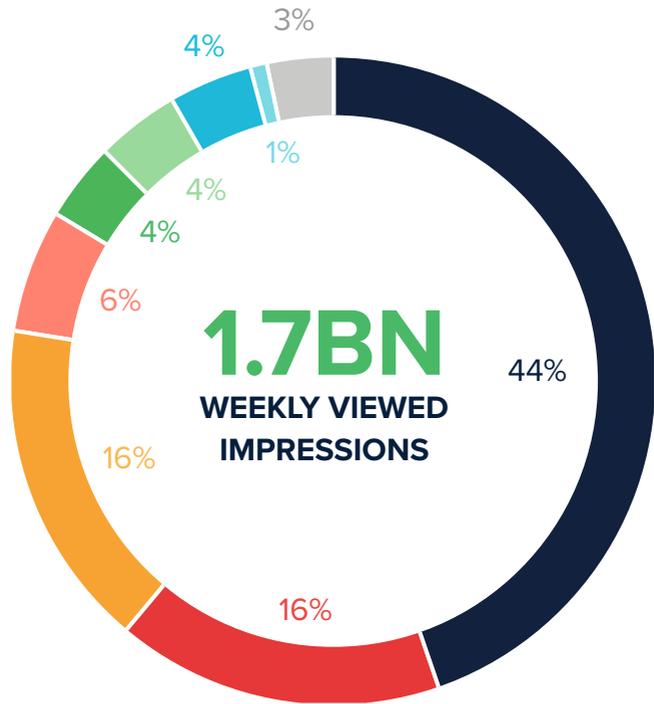
DOOH Market Share Environment



- 42% Roadside
- 22% Rail
- 20% Malls
- 11% Tube
- 4% Supermarkets
- 1% Airports

Source: Route 27. All adults, one week

DOOH Market Share Media Owner



- 44% JCDecaux
- 16% Clear Channel Outdoor
- 16% Exterior Media
- 6% 8 Outdoor
- 4% Primesight
- 4% Ocean Outdoor
- 4% Outdoor Plus
- 1% Forrest Outdoor Media
- 3% Others

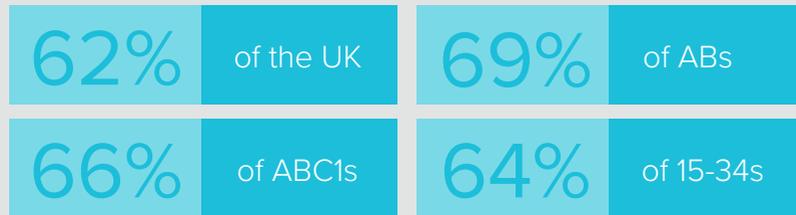
DOOH Reach by TV region



- 68% London
- 58% Scotland
- 57% North East
- 51% Midlands
- 50% Yorkshire
- 50% North West
- 42% South and South-East
- 40% West and Wales
- 39% East of England
- 36% South West

A Week in DOOH

DOOH REACHES



ROADSIDE REACHES



PROFILE



Source: Route 27. All adults, one week. Impressions throughout are based on natural delivery, which is calculated by totalling the audience delivery of each individual spot.

JCDecaux

BRANDO



JCDecaux is committed to putting the brand first and providing quality and value to partners with its BranDO charter, as DOOH moves into a more automated future.

#WEDO



We will only measure ads that have been 'viewed' using the JIC-approved Route audience measurement system.

This means 'eyes on' ad copy rather than an opportunity to see (viewed rather than viewable). We will only count real people.



Playout reports including any hardware or software issues will be published through a PwC audited process.

A report on both traded and delivered viewed impressions will be available throughout the campaign.



All audience viewed impressions will be published. We will provide the raw viewing logs that can be used for verification. Any data enrichment on top of the Route viewed impressions will be made available to all parties to the trade.



We will publish a quarterly report of our total level of campaign compliance.



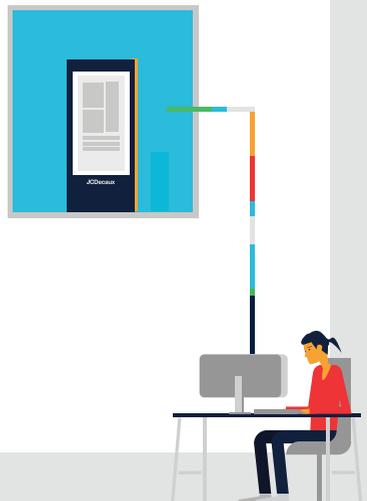


We will have the highest regard for brand safety and the security of our networks. We will utilise the highest quality screens, build and location for a brand safe display environment. We will comply with

all legal and regulatory frameworks to ensure we strive for the highest standards in sustainability and health and safety.



Automated trades will use the IAB UK approved OpenDirect and OpenRTB protocols. Copy will be approved to meet ASA and local authority standards for display in a public space.





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