



S4 Episode 7

How does Programmatic DOOH fit in a retail media strategy?



Jon Mundy & Dan Larden

Associate Director, Programmatic Demand, JCDecaux UK & Head of Media, ISBA



Today, **more than 90%** of advertisers are partnering with retailers to reach existing and prospective consumers. However, there is more to retail media than online advertising and programmatic DOOH (pDOOH) is emerging as a powerful channel within the broader retail media ecosystem. The challenge for many marketers is how to most effectively define and manage retail media campaigns across all touchpoints. In this podcast, Dan Larden, Head of Media at ISBA joins Jon Mundy, Associate Director – Programmatic Demand at JCDecaux to unpick how brands and agencies can best navigate the constantly evolving world of retail media and integrate pDOOH for maximum results.

What is retail media? How can marketers best define it to maximise its effectiveness?

Dan: "Retail media is often directly referenced by brands because they need to report what they've spend advertising budgets on – but none of them have a standard definition of what retail media actually is."

Jon: "There are a lot of challenges, we come from a programmatic background and it's all too easy to look at retail media as online and e-commerce, but actually, 84% of all transactions happen offline so retail media cannot be defined as an online phenomenon. We've been working closely with Tesco, Waitrose, and our mall partners to define retail media and what we have collectively agreed upon is that retail media is any media where the buying decisions are influenced by data that comes from retailers and that includes out of home, especially pDOOH where retailer data is frequently used to inform buying decisions."

Dan: "I think data is a great way of defining retail media because that encompasses retailer owned and operated media as well as other media owners that drive sales and retailers that run campaigns on behalf of brands. And I think more importantly, the data-led definition of retail media leans into measurement which is the thing that's

really driving the growth of retail media because for the first time brands have closed-loop attribution."

How has retail media evolved over the past two years?

Dan: "Retail media has been popular for a couple of years, largely driven by FMCG brands that have been pushing for standardisation. ISBA has released new standards that have been picked up by IAB Europe and are being used to create a global framework which will help with that piece. Outside of standardisation, many brands are restructuring to make better use of retail media budgets."

Jon: "For many years, the rise of offline retail media was driven by in-store media but now the DOOH networks that are available programmatically through demand-side platforms (DSPs) are driving change. For example, we have screens outside 500 Tesco stores in the UK and we work closely with them and use dunnhumby data to plan and optimise pDOOH campaigns – the same data that's used for in-store placements. Another example of how pDOOH is retail media is how our D6s on highstreets are used by Boots to drive footfall to their stores. Out of home is retail media and retail media is out of home – they work together."

How is retail media driving change in how brands approach media in general?

Dan: "I think from the brand side it's very interesting to understand where the budgets are coming from, what each brand's ambition is, and how they can take more control of media in general. The most advanced in this respect are the big FMCGs – Unilever and P&G – they're on very specific paths and moving away from hiring channel experts and are thinking about things more holistically focussing on how they can message consumers consistently and bring everything under one budget."

Jon: "The lack of data that FMCG brands have had in the past has shocked me but that's changing now, thanks to data-driven retail media because they're working directly with retailers and getting access to their data. I think that's also driving some in-housing of media buying, especially programmatic, and also creative."

What is the role of the media agency in a retail media-first strategy?

Jon: "My experience is that there's still a lot of focus on the agencies but there is a change happening and programmatic DOOH is a part of that because it's changing people's perception of out of home and also making the channel available to teams that wouldn't have traditionally bought it. There's also more revenue coming directly from brands as they discover what's available in pDOOH."

Dan: "I think brands are used to going direct to supermarkets, they've been doing deals for things like price promotions for decades. Now they're coming into the media world there's a lot they don't understand, for example, programmatic infrastructure, measurement, and attribution – that's the role the agencies are playing."

Jon: "Agencies are waking up to the fact that they can start talking to retailers as media owners and data sources. There is a shift in every major agency group that and a strong focus on retail media and the shopper marketing story outside of online environments."

How do different types of retail media compare?

Dan: "Anyone can spin up a social media shop with a credit card, and people can do a bit of marketing really quickly on these platforms and you've got an ecomm business, and that's great for smaller challenger brands. However, there is a premium retail media ecosystem which is developing in its own right which contains both online and offline advertising opportunities with great quality infrastructure and audiences. Brands are going to have to figure out how to make use of the e-comm opportunity, owned media, traditional broadcast channels and more sophisticated, data-driven retail media."

Jon: "The fascinating thing about retail media is that it is constantly evolving. Today, anyone to pop up and start selling on Shopify or Amazon but at the same time as brands are investing more in traditional media at supermarkets and malls are investing more in traditional media and seeing footfall and sales increase. It's a very fluid ecosystem."

How will creativity in retail media evolve over the next 12 months?

Dan: "There's definitely going to be a bigger emphasis on bringing media and creative together and there are lots of different reasons for that; efficiency being one, the other being a need to improve consumers' advertising experiences."

Jon: "Creative is a big focus for JCDecaux, which includes dynamic creative optimisation in pDOOH which is vastly underused. We've also done a lot of research into what makes a great creative and specifically which creative elements drive sales which is paramount for those investing in pDOOH as retail media."



Listen to the full episode here

To find out more about how JCDecaux can help you reach your advertising goals through programmatic DOOH visit our Programmatic Intelligence Hub or get in touch with the team uk.programmatic@jcdecaux.com.