

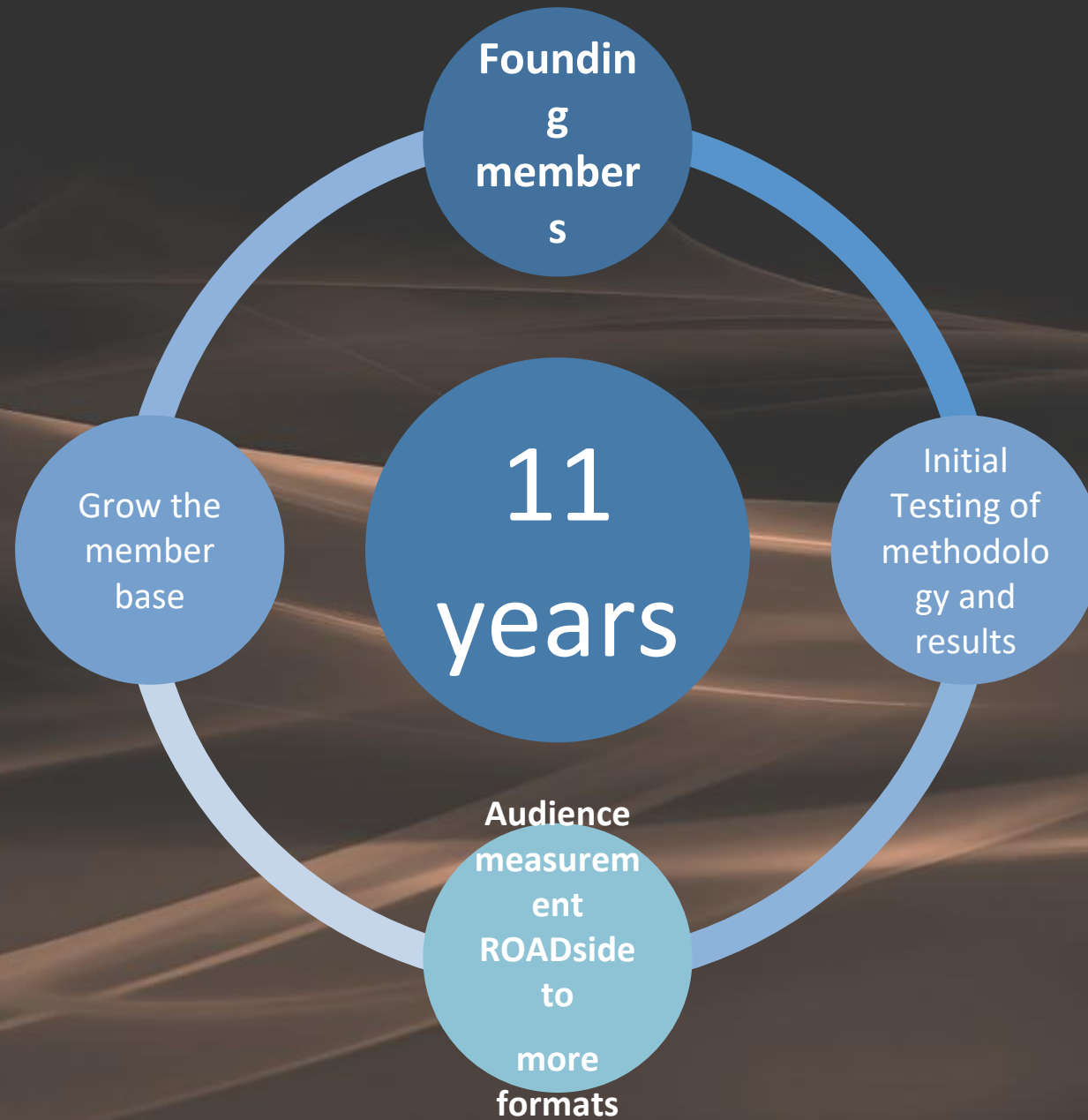


WELCOME!

ROAD2.0

Release04





FOUNDING MEMBERS



JCDecaux



50 members!



JCDecaux



tractor

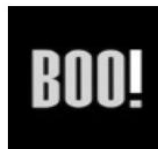
Brand IQ
outdoor advertising simplified



KEMVEST



NOZA MARKETING
first brand owners



BLACKMEDIA
OUTDOOR



frontseat
group



TAO
MEDIA



Cooking Up Your Brand



fagimvubu
media
A 100% FEMALE BLACK OWNED COMPANY
LEVEL 1 B-BBEE



relativmedia
connecting brands and people

THE
MEDIA
FACTORY

EVOLV
OUTDOOR

jinja
outdoor

adlogic
compliance ■ matters

FACE first
MEDIA

reveel.

... it's time ...
Media

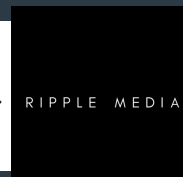


ADA
AZANIA DIGITAL ADS



SB OUTDOOR

RANGE!
MEDIA





The OMC are members of the World Out of Home Organization (WOO)

Being part of the GEEK committee, where all industry JICs are privy to audience research trends and learnings, allows us to have connections around the world!

The OMC's research follows International Guidelines for all OOH formats ensuring the highest standards – always!





Our Travel Survey



Annually 7000 face to face and 500 online interviews
= demographic information obtained
= 71 019 rolled sample over 7 years



Trips taken past 7 days
Origin & Destination info



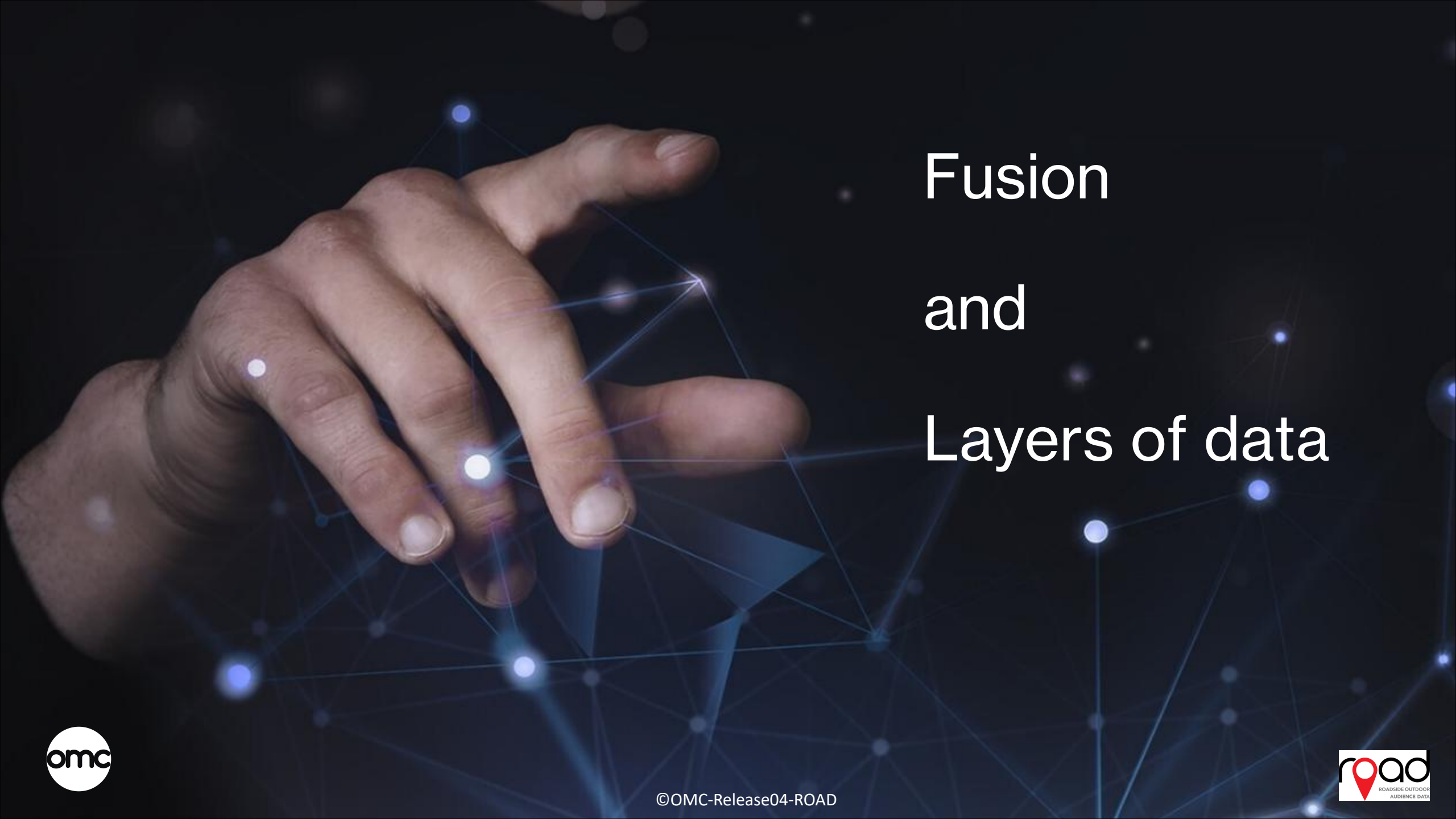
Modes of transport



Days of week travelled
Frequency of Trips



Detailed demographic information of the interviewees – no guess work!



Fusion and Layers of data



Rich Travel Data

Rich travel data that can be analysed against high quality demographic information giving the industry sound media metrics.

Demographic information that is linked and integral to travelling. That's specific to our data base. We do not bring in demographic information from other sources and use smoke and mirrors to guesstimate probably media metrics.

Our currency has people at the heart of what we do and not data!



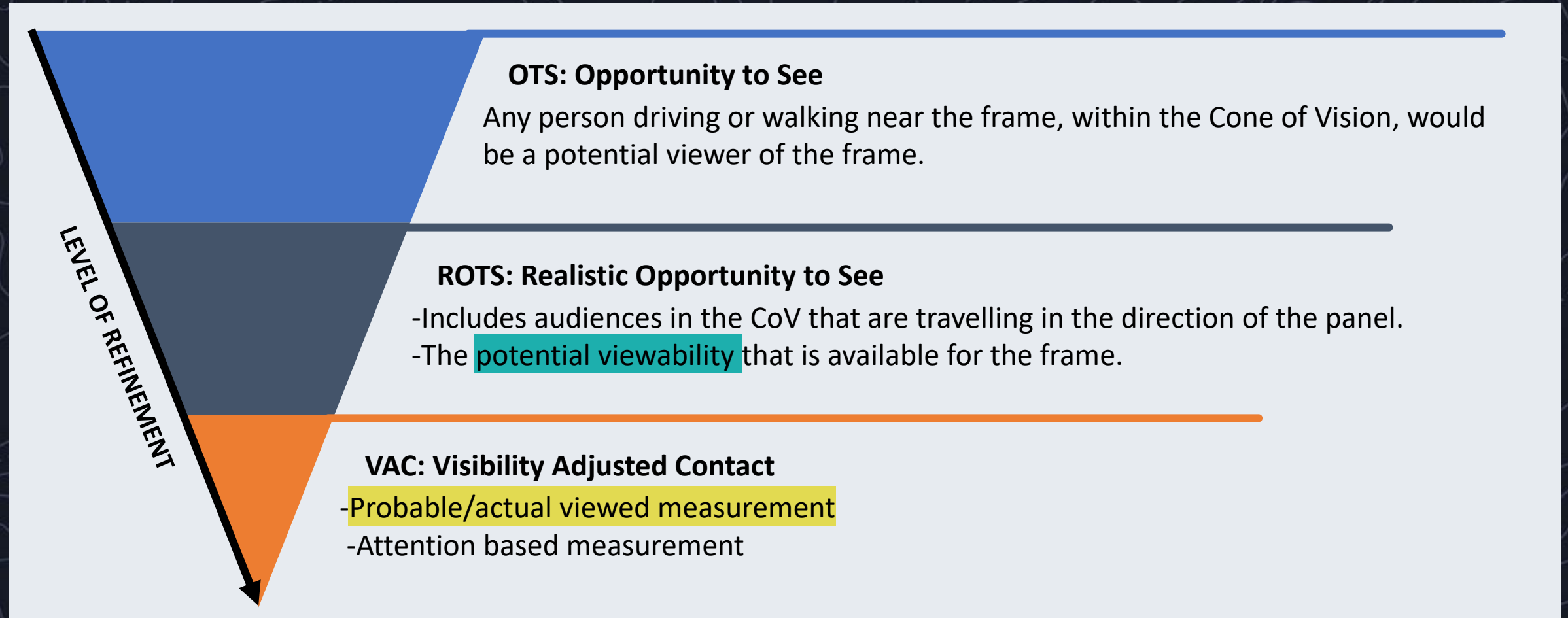
What are Visibility Adjusted Contacts (VACs)?



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The move to attention-based metrics on OOH



How other media compare



OTS

TV, Radio, Print, Online Digital

ROTS

TV, Radio, Print, Online Digital
Aspiring to be here

VAC

OOH is the only media
type that can currently
offer this level of
granularity and refined
audience figures

...for improved targeting and planning



Calculating VACs or Impacts

We estimate how many
people **probably will**
see a specific
advertisement, thus
refining campaign strategies.



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What the Traffic Intensity Model (TIM) gives us...

- The TIM enables us to combine data from the Travel Survey with multiple external data sources to generate estimates of the number of people passing within view of each panel.
- The main deliverables are audience volumes - the TIM is the main source for VACs (our new currency).
- HERE digital maps is the source of important attributes about traffic rules and restrictions eg Road type, one or two-way, speed of road, road capacity, and so on.




*OUT OF HOME reaches
everyone, even hard to
reach AUDIENCES*



Gaining
significant
attention and
traction

OMC currency
can be
supplemented
by other data
resources





Why is data so important?

Internationally recognised data adds gravitas to all media types and assists with increasing the share of the marketing budget!

The ROAD2.0 data is the full package – detailed demographic information, modelled and fused data resulting in the gold standard of OOH research.



Benefits of having excellent OOH Metrics

Utilizing OOH impression metrics provides numerous benefits such as improved targeting, enhanced ROI, and better campaign optimization. These metrics enable advertisers to make data-driven decisions, ensuring their messages resonate with the intended audience effectively.



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Benefits of having excellent OOH Metrics

Of course, having OOH metrics means that you are able to compare OOH with all other media types. You can also set your budgets correctly for OOH.

The Travel Survey will be available on various cross tabulation software packages.



Destination P7D		17C24A
Total	Audience(000)	28 681
	Resps	71 019
	%Col	100
Shops	Audience(000)	25 251
	Resps	62 648
	%Col	88%
Friends	Audience(000)	12 617
	Resps	30 239
	%Col	44%
Place of Worship	Audience(000)	10 497
	Resps	24 694
	%Col	37%
Work	Audience(000)	9 360
	Resps	26 526
	%Col	33%
Restaurant	Audience(000)	7 461
	Resps	20 996
	%Col	26%
Creche	Audience(000)	6 507
	Resps	16 193
	%Col	23%
Hospitals	Audience(000)	5 164
	Resps	11 679
	%Col	18%
Taverns and Pubs	Audience(000)	2 766
	Resps	6 087
	%Col	10%

Main modes of transport P7D		17C24A
Total	Audience(000)	28 681
	Resps	71 019
	%Col	100
WALKING	Audience(000)	19 420
	Resps	45 089
	%Col	68%
CAR	Audience(000)	13 366
	Resps	36 231
	%Col	47%
MINI BUS TAXI	Audience(000)	10 380
	Resps	23 260
	%Col	36%
BUS	Audience(000)	996
	Resps	2 299
	%Col	3%

And this is why we are
ecstatic to share with you
today

ROAD2.0 R04

Driving OOH media strategy, planning and
buying with solid research!

VERY stable data – which is good news!
This shows the stability of our research!



The new frame numbers....

5,425 active panels in IDS
(and growing)

Static 4,978 (92%)

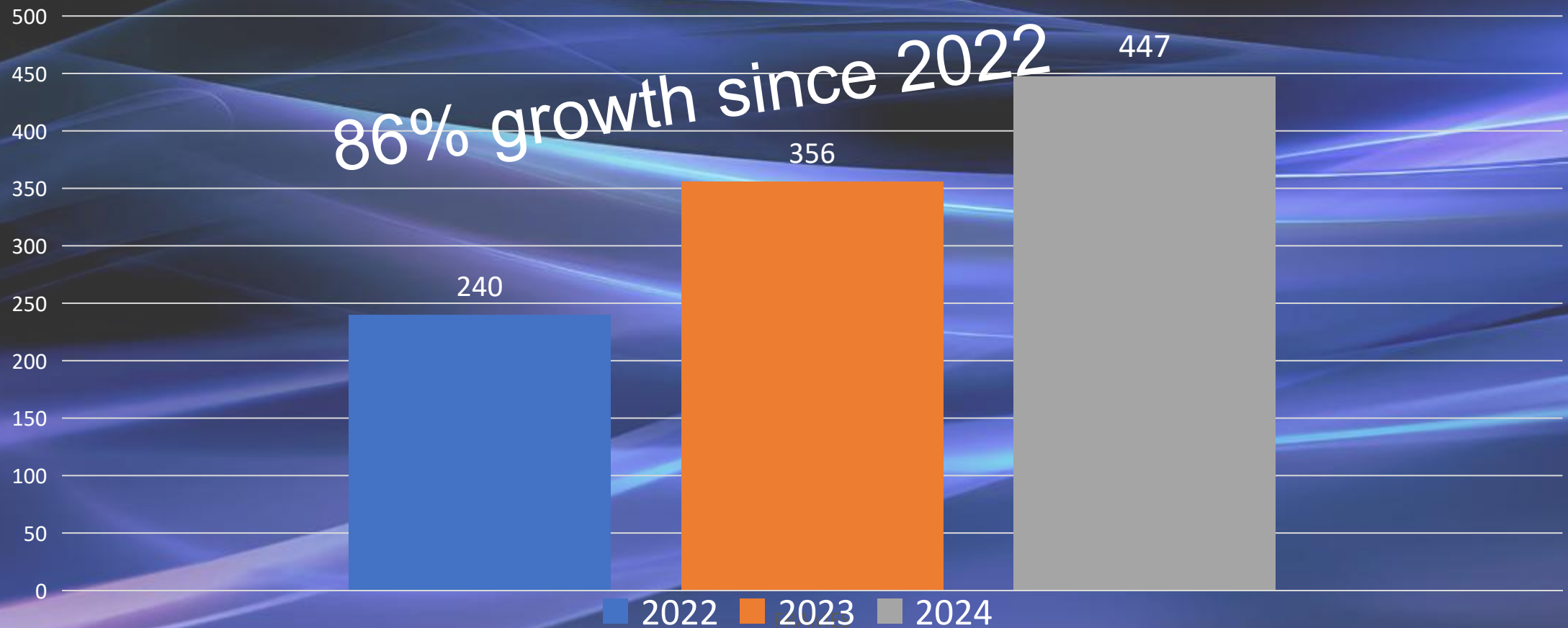
Digital 447 (8%)



©OMC-Release04-ROAD



The growth in DOOH frames in IDS





71.019 respondents interviewed, geocoded and routed on street links



833.947 origin to destination trips



4.702.237 street links evaluated in new traffic intensity model



756.881 visually adjusted weighted respondents per frame per month (VAC)

* Based on 4 weeks





28.680.877 Adults aged 15+ in Metro Urban areas



21.535.908 adults reached (aged 15+)



75 % of the measured population
(aged 15+)



4.106.078.650 visually adjusted contacts (VAC)

* Based on 4 weeks



Gauteng	Western Cape	KZN	Eastern Cape	Free State	Limpopo	Mpumalanga	North West	Northern Cape
3,476 panels	512 panels	528 panels	266 panels	79 panels	243 panels	180 panels	221 panels	29 panels
3.1b VACs	247.2m VACs	277.7m VACs	80.9m VACs	36.2m VACs	53.3m VACs	67.3m VACs	42.8m VACs	9.2 m VACs
Highest VACs 13m	Highest VACs 3.8m	Highest VACs 6.3 m	Highest VACS 3.95m	Highest VACS 460k	Highest VACs 1m	Highest VACs 1.8m	Highest VACs 2.5m	Highest VACs 994K
Ave VAC 881 000	Ave VAC 483 000	Ave Vac 526 000	Ave VAC 458 000	Ave VAC 304 000	Ave VAC 219 000	Ave VAC 374 000	Ave VAC 382 000	Ave VAC 317 000
Static 91.5%	Static 91%	Static 91%	Static 96%	Static 96%	Static 94%	Static 92%	Static 92%	Static 93%
Digital 8.5%	Digital 9%	Digital 9%	Digital 4%	Digital 6%	Digital 6%	Digital 8%	Digital 8%	Digital 7%
* Based on 4 weeks								



And you can of course
do detailed profiling of
media owner inventory



TRENDS IN OOH



The Power of Digital OOH

Digital OOH advertising is transforming the landscape in SA and the world.

Not only with dynamic content and the ability to change messages in realtime, brands can engage audiences like never before. An advertisers dream... in comparison to static.



Programmatic

It allows for automated buying and selling of ad space, enabling advertisers to target specific audiences and optimize their campaigns in real-time.

This trend is driven by the need for greater efficiency and effectiveness in advertising, as well as the availability of data and technology to support programmatic buying.



Programmatic

Currently there is no such thing as live data available for DOOH.

What the industry can offer is probable reach before campaigns flight utilising the ROAD2.0 data and depending on the media owner, some can offer post campaign information based on sensor information.



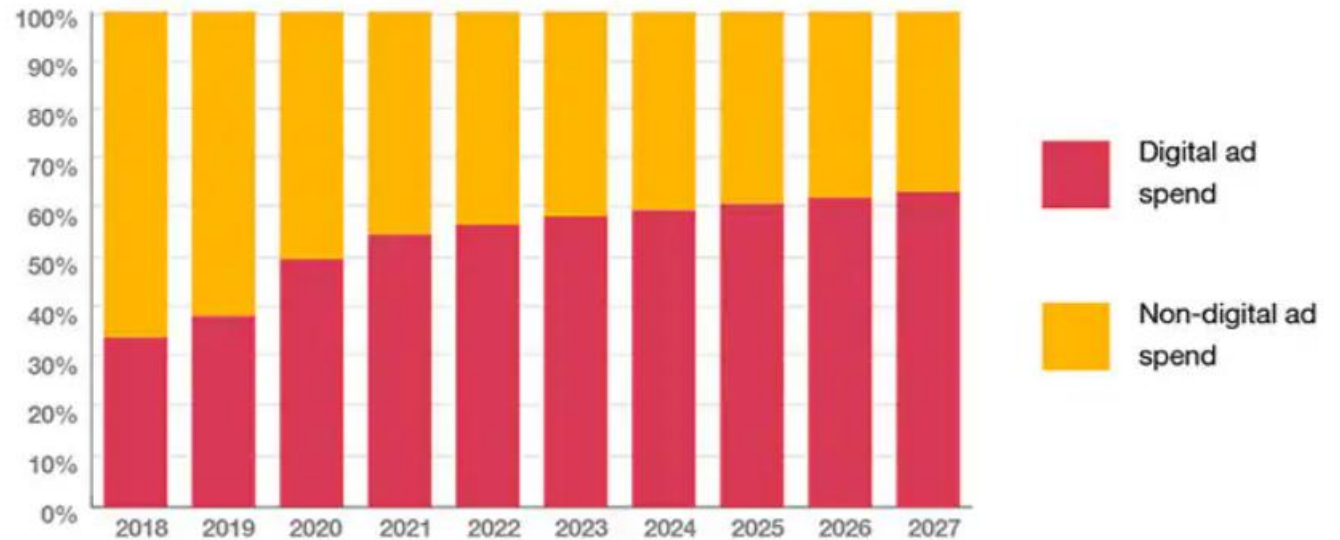
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Digital Adspend

Digital will account for nearly two-thirds of ad spend in South Africa in 2027

South Africa advertising spend split by digital and non-digital, 2018-2027 (%)



Source: PwC, Omdia

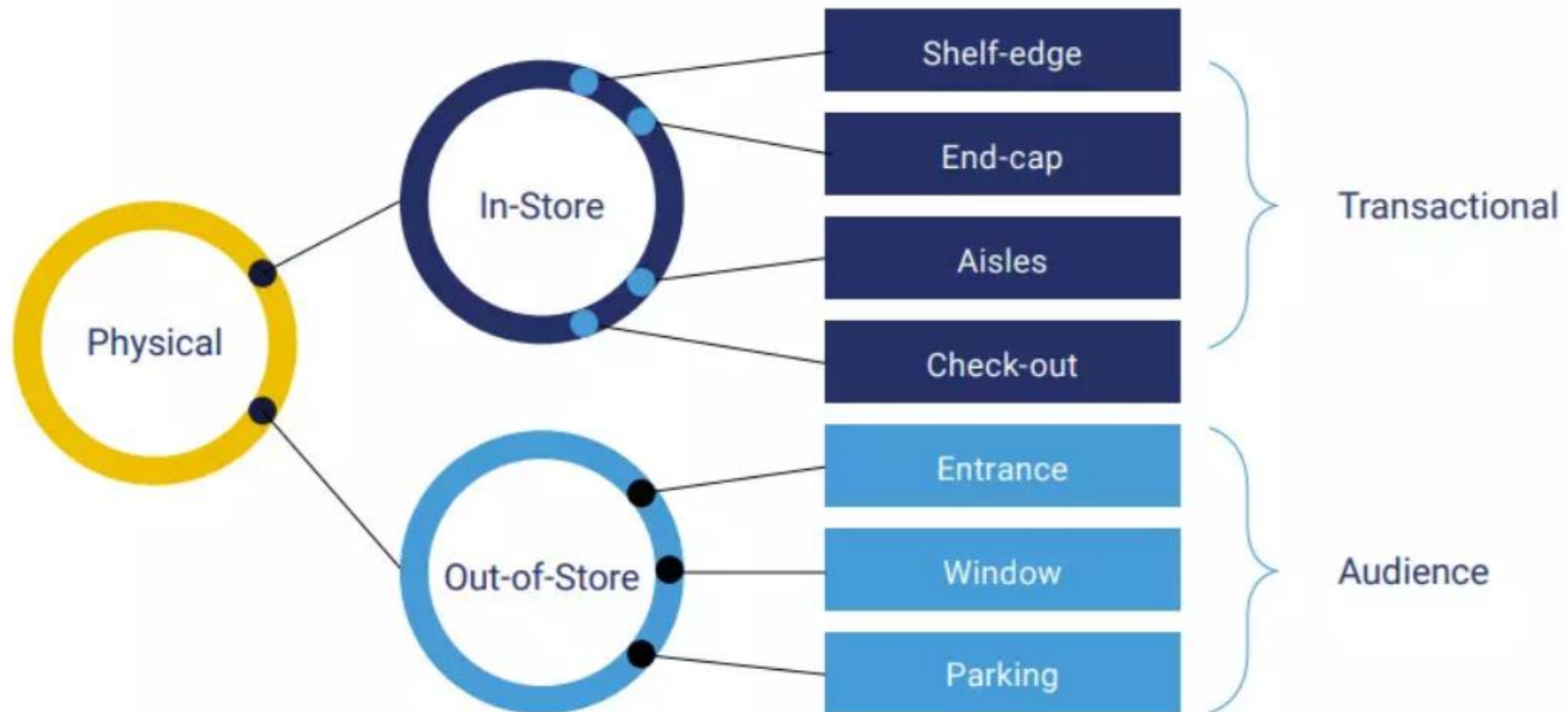
And one can't ignore Retail Media

*Source:
Retail Media Is
Not DooH
~ Invidis, UK*



In-store retail media vs. out-of-store retail media

The fundamental difference between in-store and out-of-store retail media is that the first uses transactional data, while the second leverages audience data. That makes out-of-store retail media more akin to digital-out-of-home.



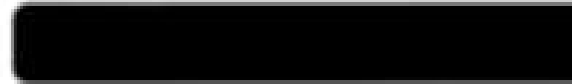
Static Outdoor Not Growing? Think Again

Billboard Insider,
25 October 2024



My roadside static billboard revenue is

Up by more than 10% year over year 22.06%



Up by 5-10% year over year. 29.41%



Up between 0 and 5% year over year. 44.12%



Down year over year 4.41%



Transit Nodes

IPSOS has already commenced working on these formats - Taxi Ranks, Gautrain, Airports, Train Stations , and Bus Stations

To launch early 2025



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Inclusive and Representative OOH research

We are committed to produce an out of home currency which will contribute to building the credibility and stature of the Out of Home (OOH) industry .

The OMC's vision is to produce **consolidated, inclusive and representative research** covering the key OOH areas.





Thank You!

