

# Demystify “Digital”

True incremental  
Value for  
Advertisers!



# “Digital out of Home” – Opening the Door to Sector Growth

## German Market Dynamics in the last 12 Months

Total Ad Market

~ -7%

Classic OoH

~ 0%

Global Platforms\*

~ +3%

Digital OoH

~ +27%

\* Google, Youtube, Facebook, instagram, Snapchat



A young girl is dressed as a pilot, wearing a brown aviator hat with goggles, a white quilted vest over a teal long-sleeved shirt, and pink pants. She has large white wings with red tips attached to her back. She is standing against a light gray wall with a vertical height chart. Her right arm is raised towards the top of the chart. A white rectangular box with a thin black border is overlaid on the image, containing the text "Screens everywhere ... Format-agnostic." in white font. The background is a plain, light gray wall.

**Screens  
everywhere ...  
Format-  
agnostic.**



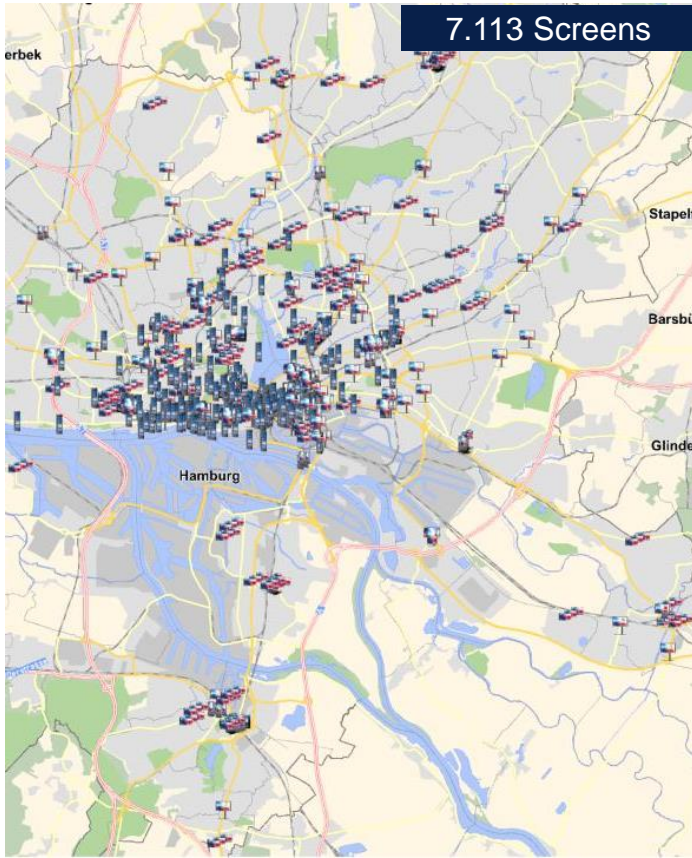
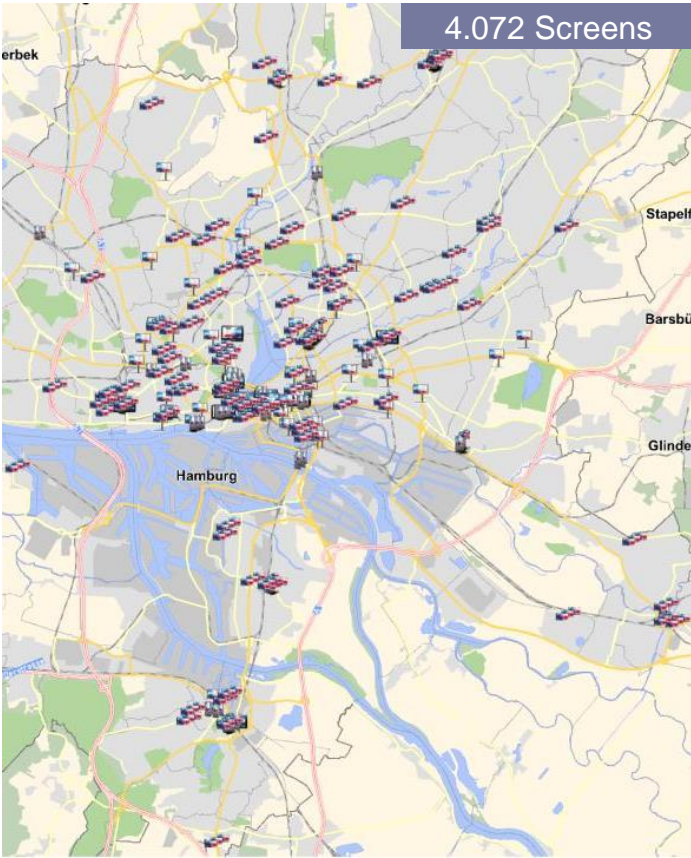
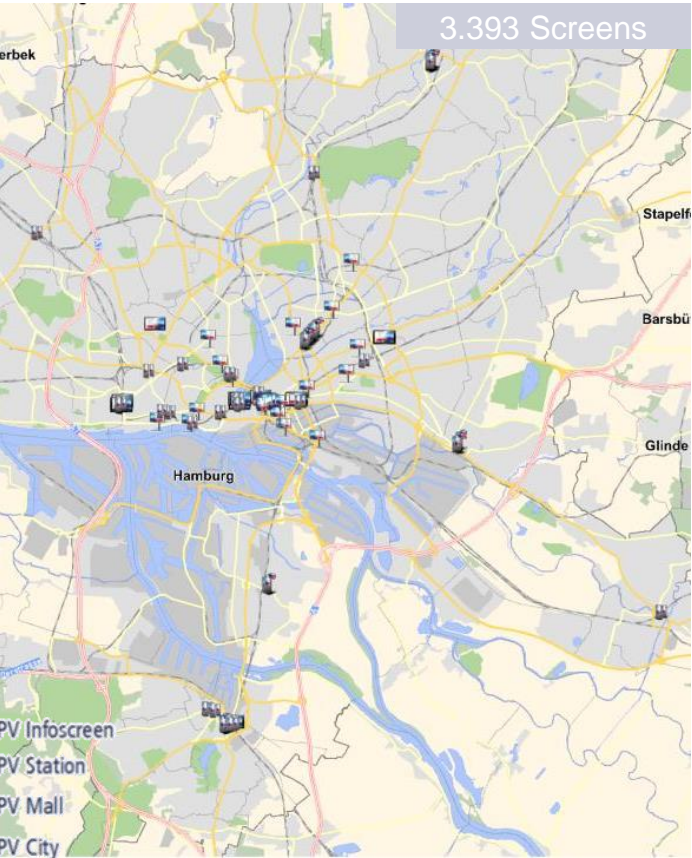
# On-going Portfolio Expansion of Public Video. Example Hamburg.

Construction of 200 Public Video City Tower in 2022, bringing the total number of Public Video screens in Hamburg to more than 5,000.



# Example: Digitisation in Hamburg

## Incremental Inventory pushes Reach beyond Performance of Local Print Products



- Legend**
- PV Infoscreen
  - PV Station
  - PV Mall
  - PV City
  - PV City (Pillar)
  - PV Ambient
  - PV Roadside
  - PV Giant (Mega Vision)
  - PV Giant (Super Motion)

**2017**

**2020**

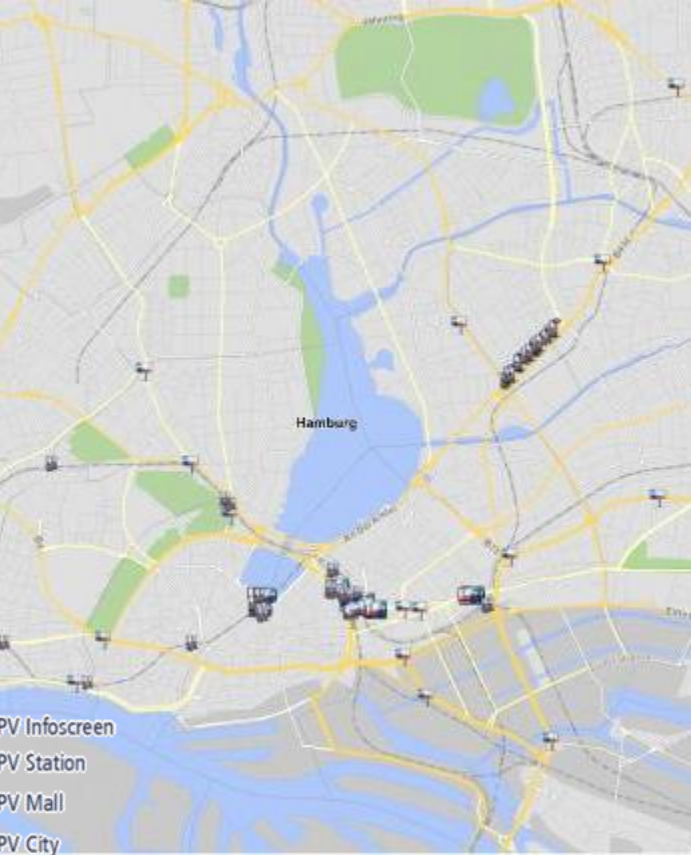
**2023\***

\*Estimated Screens

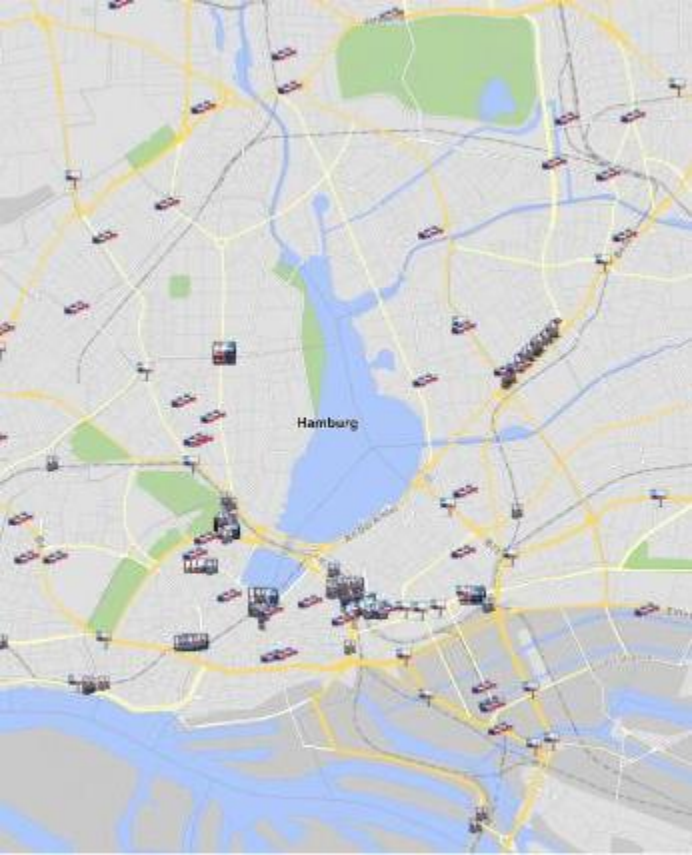


# Example: Digitisation in Hamburg Downtown

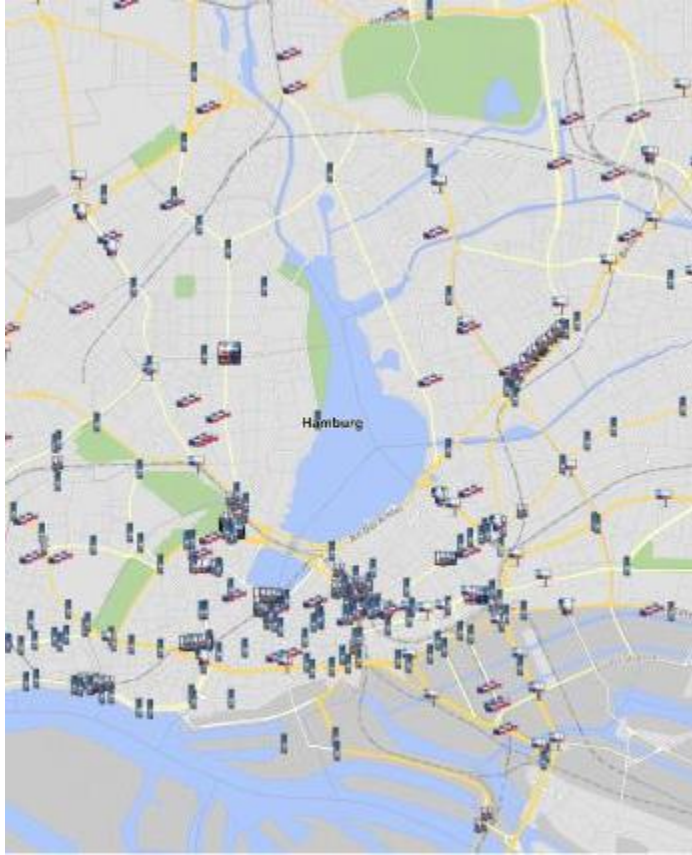
Incremental Inventory pushes Reach beyond Performance of Local Print Products



2017



2020



2023\*

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- PV Infoscreen
  - PV Station
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\*Estimated Screens



# Public Video Infoscreen

- Exclusivity while waiting at the platform
- S-/U Bahn & Public Transport
- 783 screens
- 128 U-/S-Bahn stations
- 18 cities





# Public Video Station

- Attention and reach at railway stations
- (Long-distance) railway stations
- 2,121 screens
- 268 stations
- 118 cities





# Public Video Mall

- Reaching mall visitors in shopping mode
- Shopping malls
- 2,414 screens
- 120 malls
- 81 cities





# Public Video Roadside

- Attention and reach on the road
- Main roads intersections
- 873 screens
- 592 locations
- 66 cities





# Public Video City

- Reaching shoppers in in the city centre
- Pedestrian zone / city centre
- 413 screens
- 215 locations
- 32 cities





# Public Video City Tower

- Reach in the city
- Touchpoint: city centre, inner city traffic area
- 233 screens
- 114 locations
- Hamburg





# Public Video Giant

- Highlight stagings at highly frequented touchpoints
- Main traffic arteries, railway stations, shopping centres
- 54 screens
- 34 locations
- 14 cities





# Public Video Scene

- Customer approach in a casual scene environment during leisure time
- Restaurants, Cafés & Bars
- 1,242 screens
- 1,222 pubs/restaurants
- 48 cities





# Public Video Retail

- Reaching shoppers at the POS
- Food retail & drugstores\*
- 1,658 screens
- 602 locations
- 292 cities





# Public Video Office

- Reaching office workers in the work environment
- Touchpoint: In the lift of office buildings
- 122 screens
- 84 locations
- 8 cities





# High-frequency locations.

Exclusive locations and the highest quality of screens attract all eyes.





41 Bad Oldesloe 6A-C  
43 Kiel Hbf 6D-E

S  
12 Bergedorf  
121 Neuglück  
Gleis 4

S 1-2 s  
↑

Altona - West  
Altona - Pinneberg  
Dammbr - Elbgaustraße  
Dammbr - Altona

Steindamm  
Fotocentrum

A100

180 Leasing  
Touristeninformation

A-C 5 →

A-C 7 →

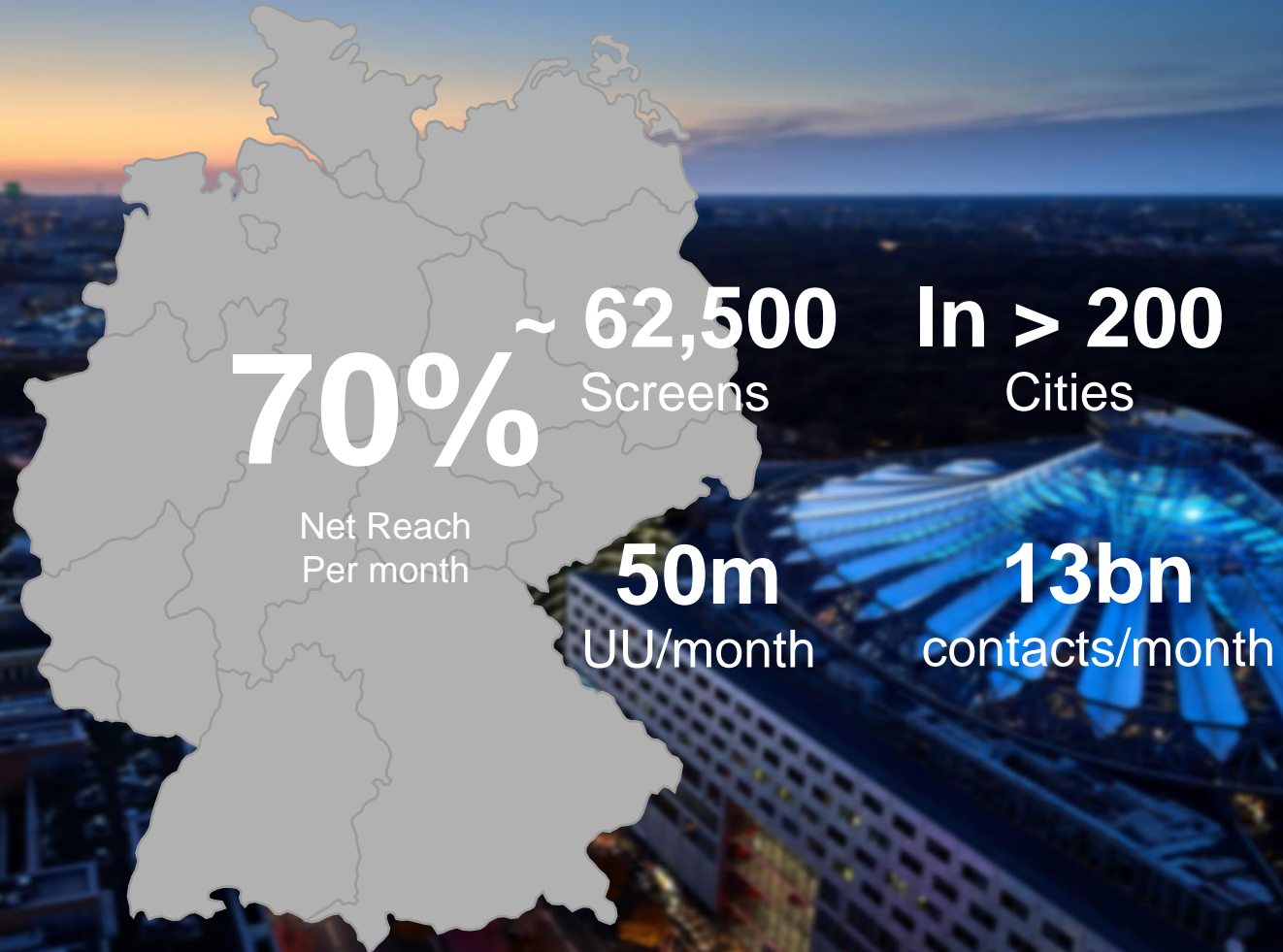
56

**NUR HIER**  
wach & heiß

Advertisement for coffee and beer featuring various drinks in mugs and cups.



# Where we are in Germany as Ströer regarding National Coverage: Public Video Indoor and Outdoor.







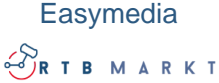











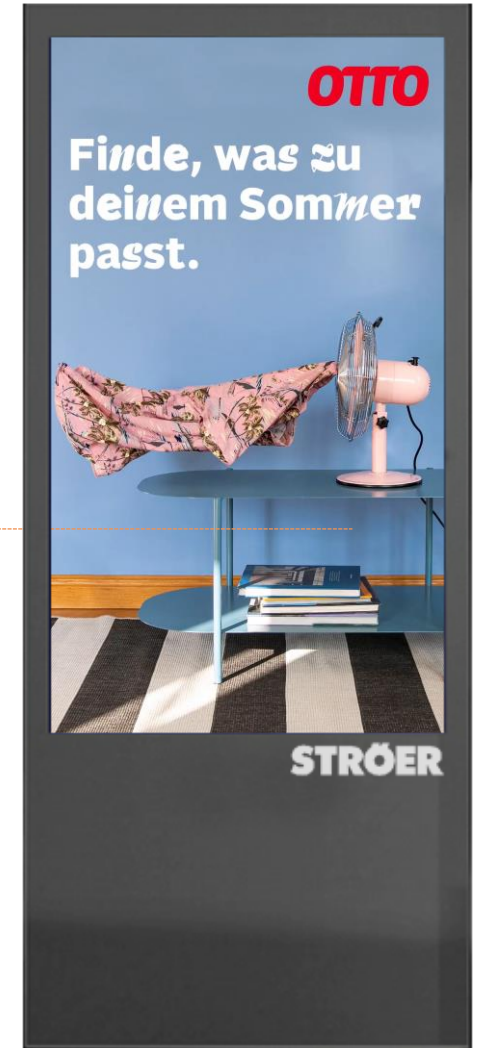


Everything  
programmatic?  
Maximum  
Automation!



# Available via All Relevant DSPs





# Automation: Available for All Programmatic Deal Types

## Managed Booking

## Programmatic Booking

Managed Service	Programmatic Guaranteed	Fix Price Deal	Private Auction	Open Auction
Price Contacts Period Budget predefined	Price Budget Transparency level predefined	Transparency level predefined  Budget & price flexible	Transparency level predefined  Budget & price completely open	
Fixed price at campaign level	Individual fixed price at campaign level*	Individual media floorprice at deal level*	Floor price at inventory level	

\*Billing on advertising media basis





**Public Video  
Solutions.**



# Audience based Public Video Solutions



## Time

Hourly basis  
Day basis



## Location

States  
Cities  
POSTCODE  
Mall  
Street  
Train station  
Custom



## Audience

Gender  
Age  
Behavioral  
Interest  
Personas  
Custom



## Event

Weather  
Stock exchange  
National League  
Traffic jam  
Custom



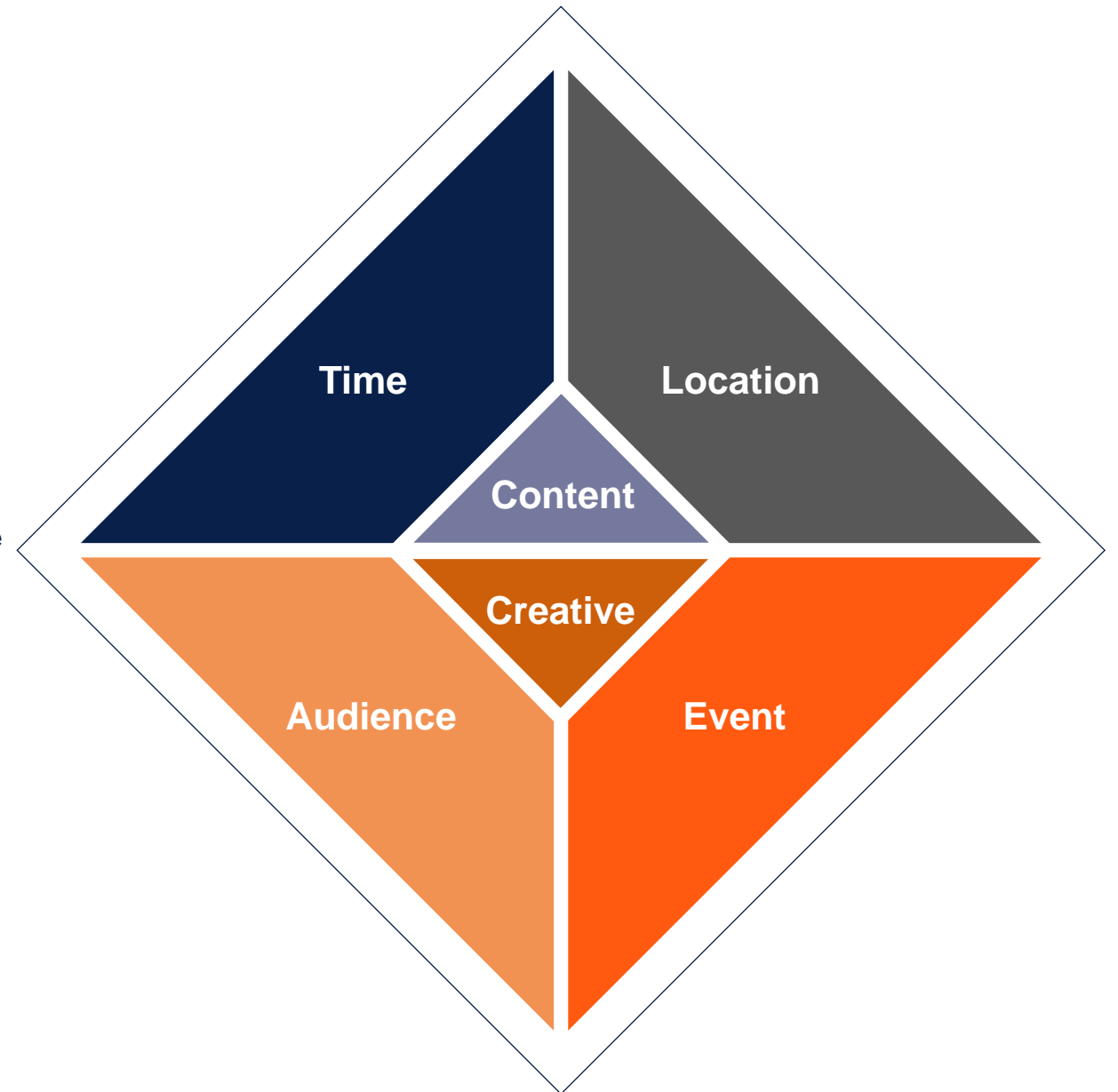
## Content

Advertorial  
Logointegration  
Companion  
CutIn  
SplitScreen  
InAd



## Creative

Dynamic payout  
Dynamic Advertising [DCO]  
Creation





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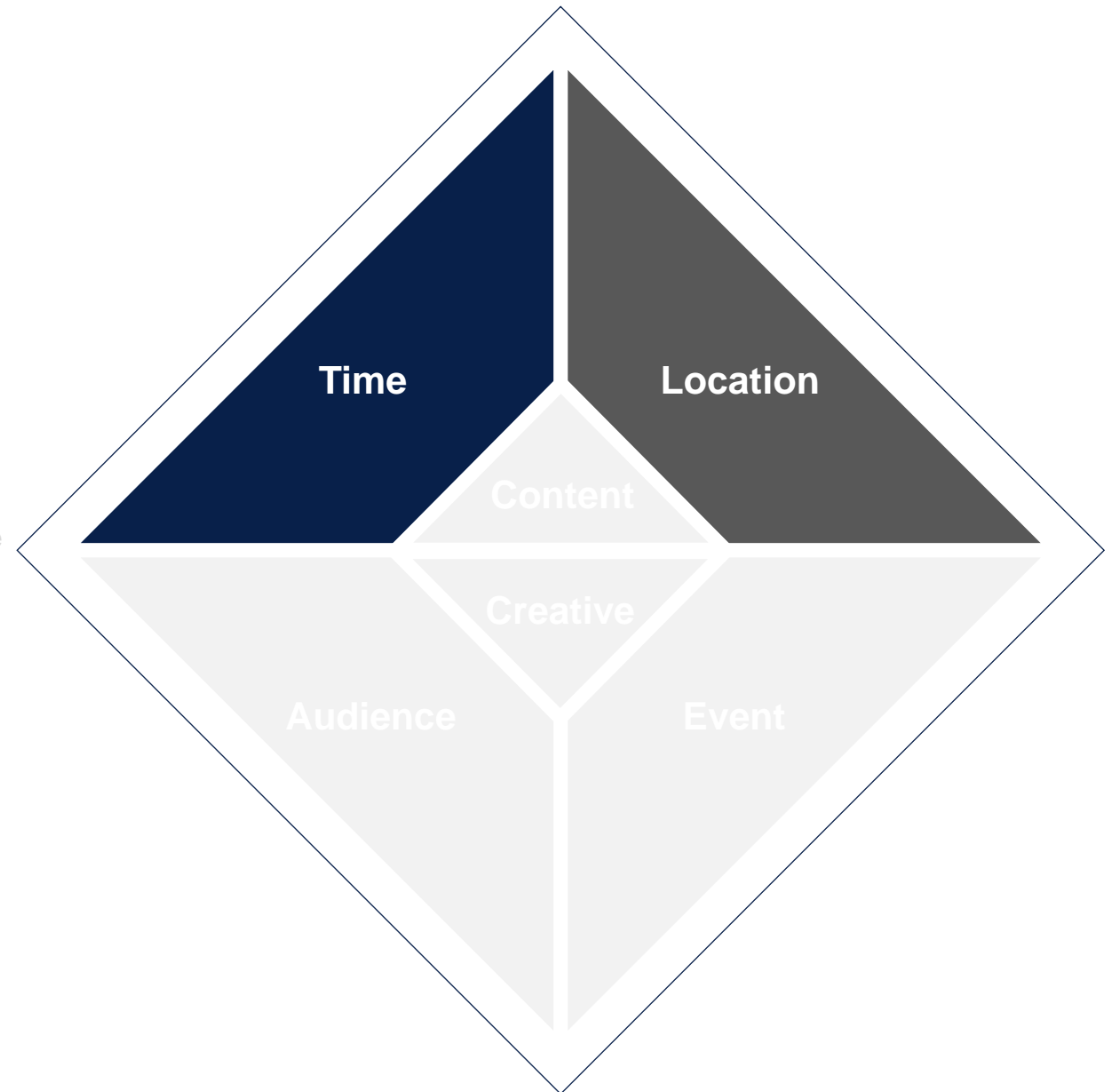
## Content

Advertorial  
Logointegration  
Companion  
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InAd



## Creative

Dynamic playlist  
Dynamic Advertising [DCO]  
Creation





# Professionals.

Address at commuter times on public transport, at the national train station, on the street and in the office building.



# Nightlife.

Being where people party or let the evening fade away: In the city's trendy and student districts, in restaurants and bars.



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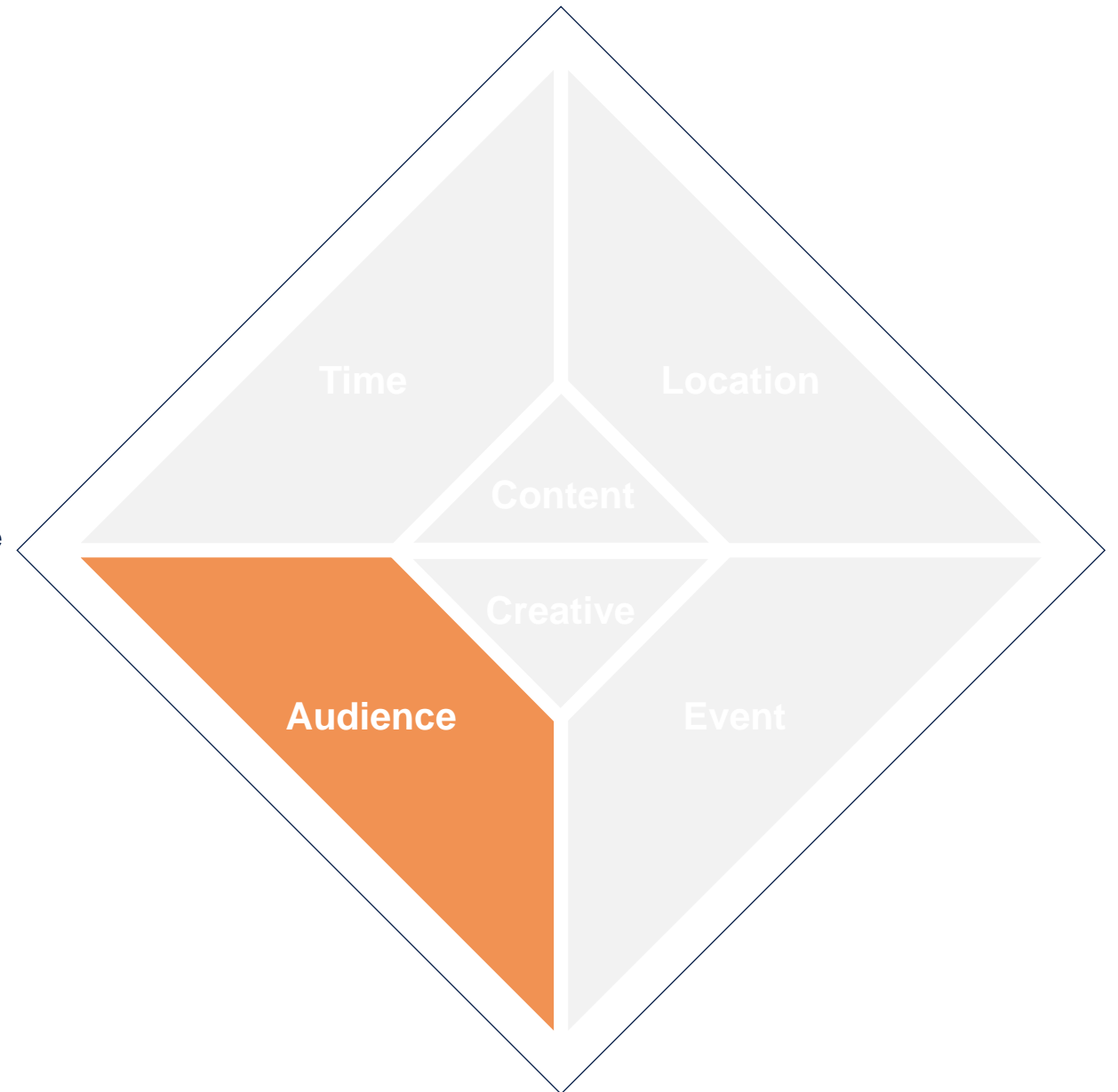
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Dynamic payout  
Dynamic Advertising [DCO]  
Creation





# Audience Targeting

## 1. Audience Data

Audience data is provided by i.e. our own Data JV with online data providers and can represent various audience segments.

## 2. Movement data

With the help of anonymized movement data from Deutsche Telekom mobile customers, audience segments are projected into the space.

## 3. Playout

Determination of the audience concentration of the segments for each individual Public Video location for each hour of the day.

Activation of Public Video locations with above-average audience concentration in the Public Video ad server.

## 4. Result

Real-time optimization increases contacts in the target group





# Overview of the Public Video Audiences



## Demographic Audiences

Optimization based on:

- Gender
- Age steps of 10

## Behavioral Audiences

Optimization based on:

- Interests
- Personas
- Habits
- Usage

## Custom Audiences

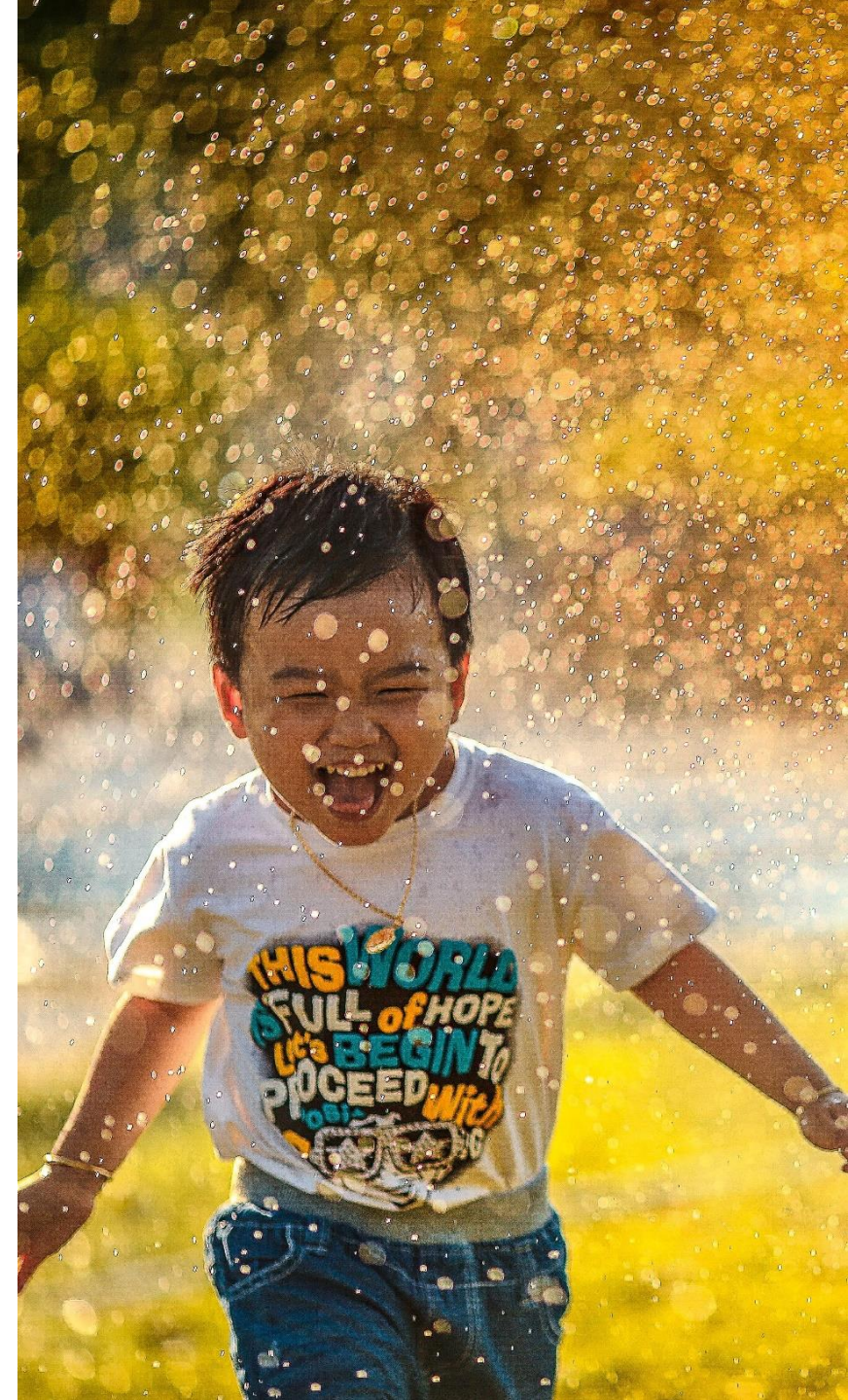
Optimization based on:

- Customer-specific target group optimization



# Public Video Behavioral Audiences

■ Sport	■ Tech	■ Fashion	
■ Lifestyle	■ Gaming	■ Pet supplies	
■ Toys	■ Baby Care	■ Premium Buyer	■ House and land
■ Outdoor	■ Home	■ Nature Lover	■ Purchasing power
■ Garden	■ LOHAS	■ Family	■ Housing
■ Automotive	■ Veggie	■ Energy supply	■ Media usage
■ Life phases	■ Geo Milieus	■ Finance	■ More on request





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Day basis



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## Audience

Gender  
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Personas  
Custom



## Event

Weather  
Stock exchange  
National League  
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Custom



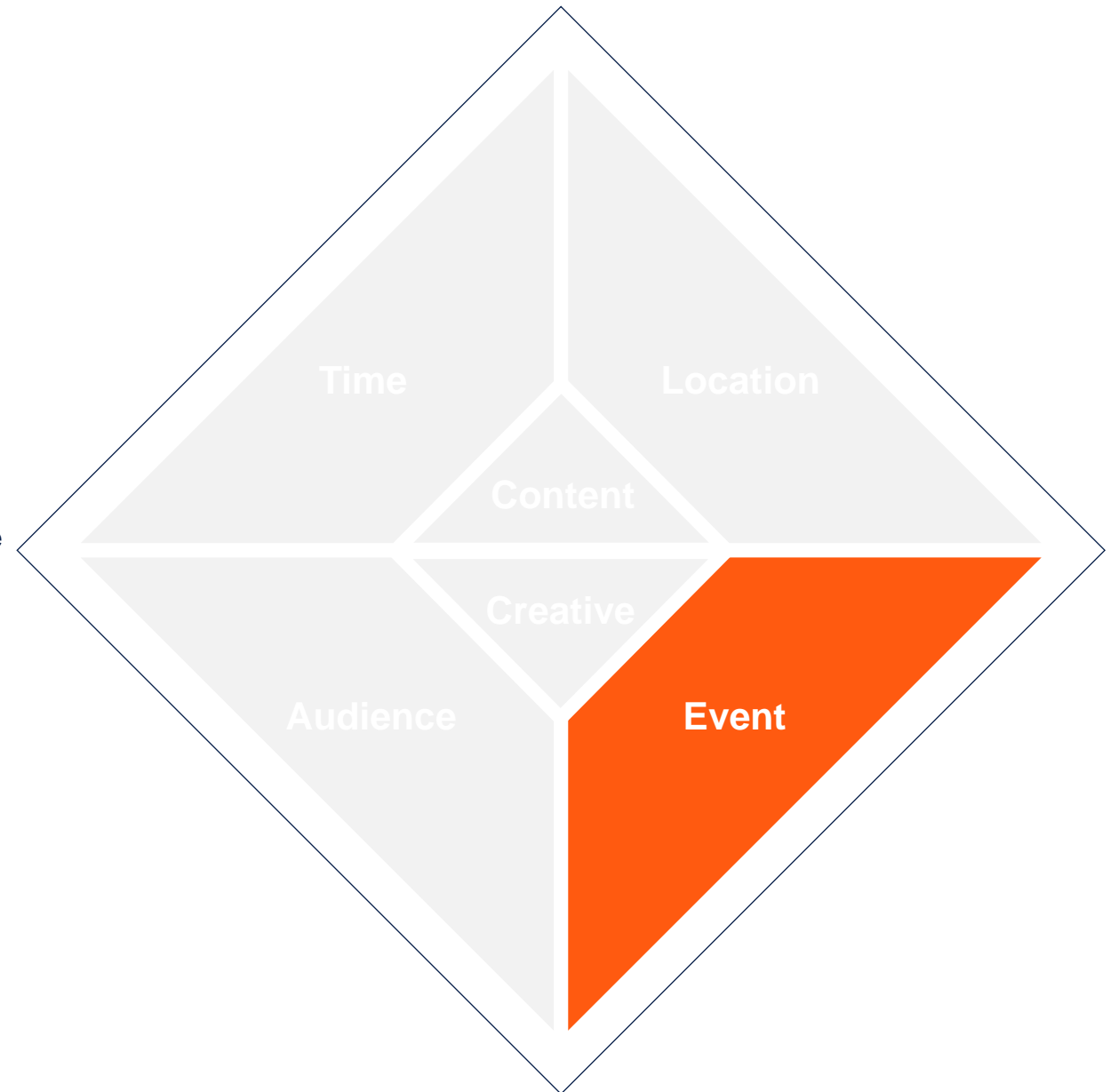
## Content

Advertorial  
Logointegration  
Companion  
CutIn  
SplitScreen  
InAd



## Creative

Dynamic layout  
Dynamic Advertising [DCO]  
Creation





# Event: Weather



## Control according to

- Temperature
- Weather condition
- UV exposure



# Event: stock market



## Control according to

- Stock titel
- Stock indices



# Event: Bundesliga



## Control e.g.

- Perimeter around the respective venue
- Timing, e.g. 3 hours before the start of the match / or after the end of the match



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Day basis



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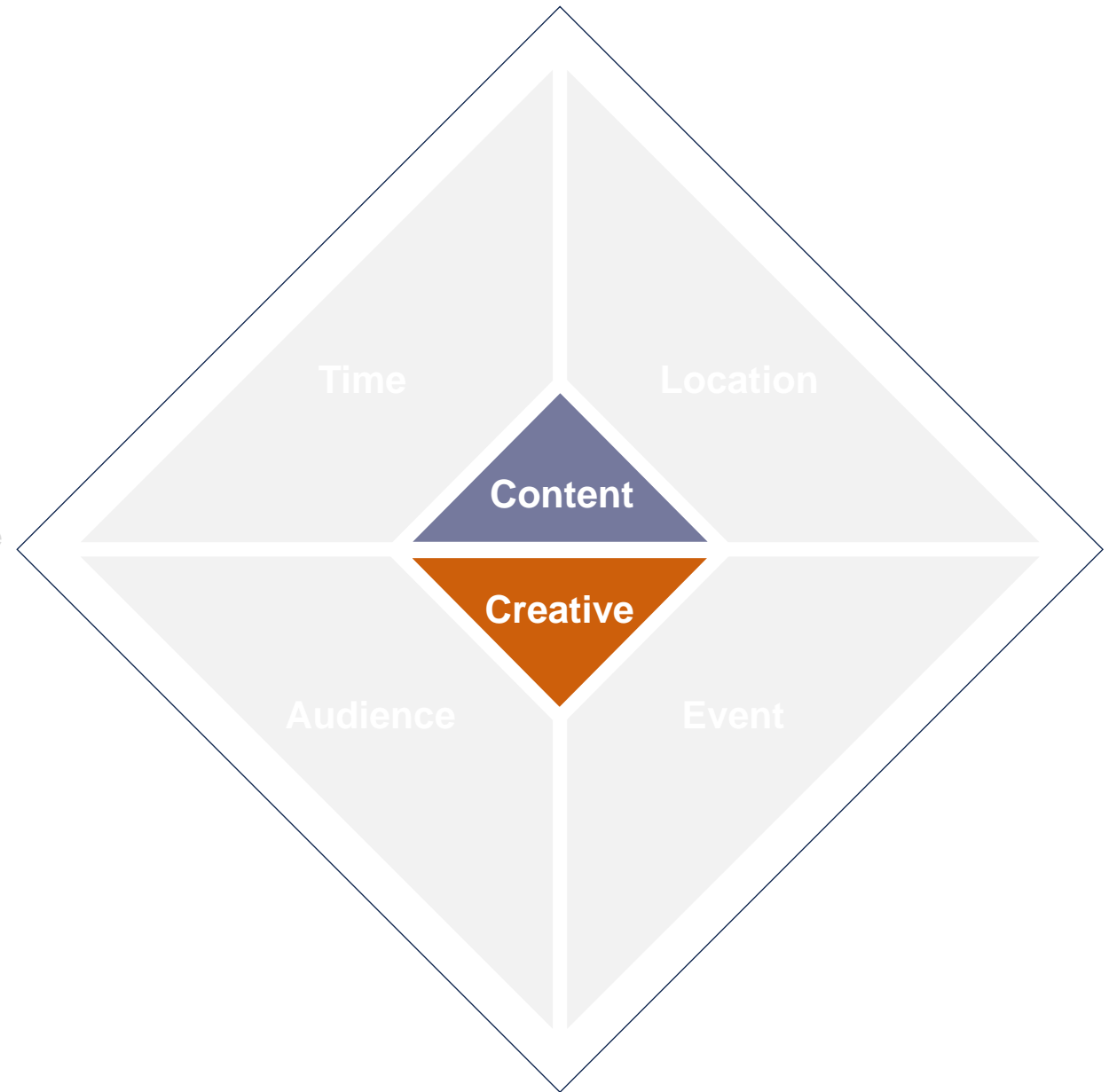
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Logointegration  
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CutIn  
SplitScreen  
InAd



## Creative

Dynamic playout  
Dynamic Advertising [DCO]  
Creation





# t-online

- "News for Germany"
- Information for the population about current world affairs, politics, finances as well as major (sports) events, weather and the stock market
- Public Video categories:
  - Weather
  - Stock exchange
  - News (news block á 30 seconds)
  - Bundesliga results (only on Bundesliga match days)





# desired

- "Your moment. Your life. Your magazine"
- Desired provides the inspiration to live your life the way it makes you happy.
- Authentic content around fashion, stars, empowerment, beauty & lifestyle.
- Public Video categories\*:
  - Empower Yourself
  - Female Facts
  - She Said
  - WOW Female
  - "Schon gewusst"

\*Approx. 4 contents per week | desired Content runs on PV Infoscreen, Station, Mall (Status August22)





# Content: CutIn Ad



- Maximum visibility in close proximity to editorial content
- Attention-grabbing, as the ad placement is visually integrated into the content



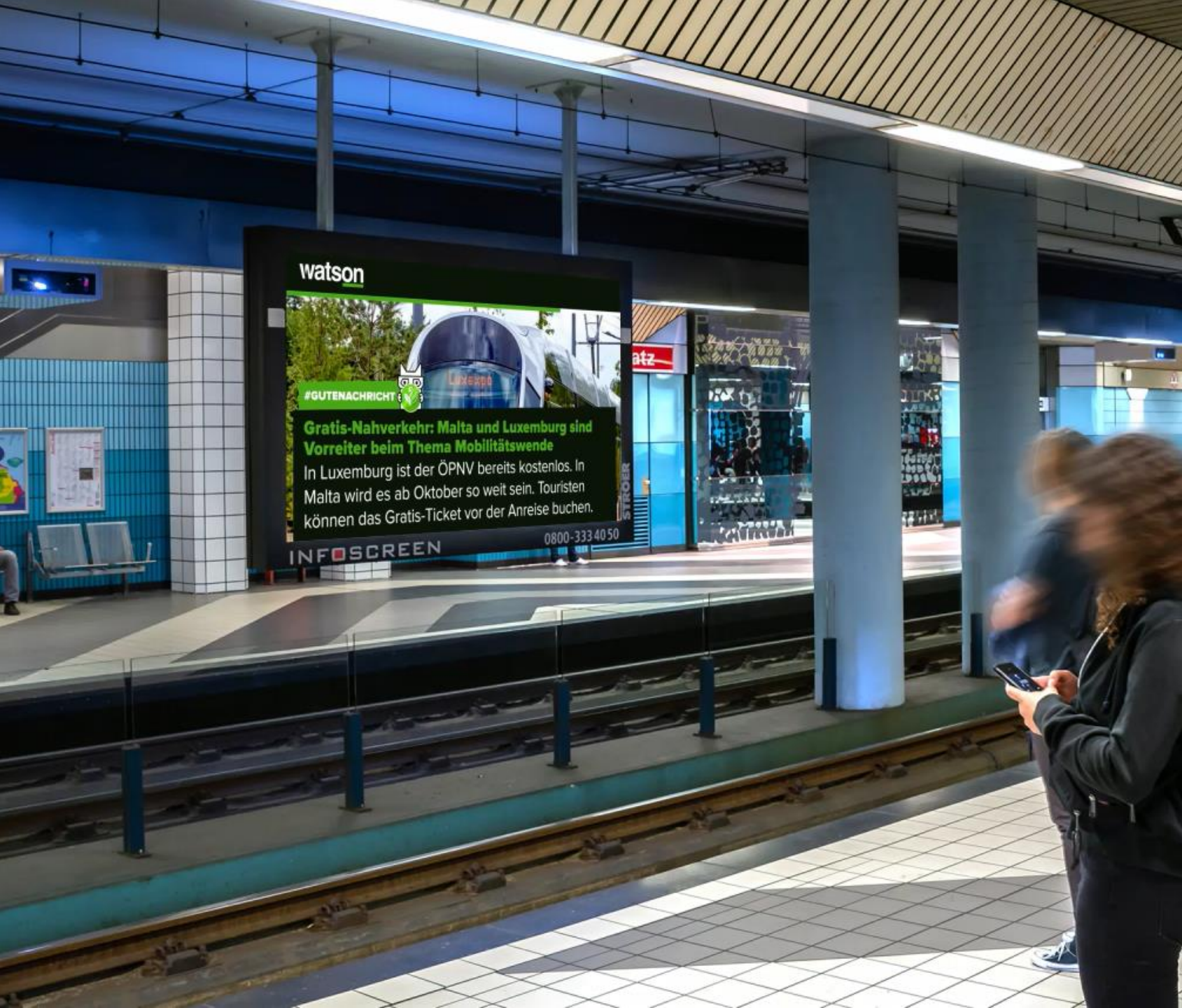
## Content: SplitScreen Ad



- Maximum visibility in the environment of results such as weather / national league / stock exchange etc.
- Integration of the advertising message directly into the content



# Content: Companion Ad



- Placement immediately after or before editorial content
- Increased attention through placement in the editorial environment



# Dynamic Creative Optimization [DCO]

Aufgepasst  
Hamburg

Guten Morgen  
Kalk

Augen auf  
Haidhausen

Aufgepasst  
München

Guten Morgen  
Hamburg

Guten Morgen  
Tiergarten

To the right person. At the right time. At the right place. With the right message.

Augen auf  
Frankfurt

Aufgepasst  
Flingern

Augen auf  
Haidhausen





Screens

+ Coverage

+ Tech & Data

= Solutions



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## German Market Dynamics in the last 12 Months

Total Ad Market

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Classic OoH

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Before I came here I was confused about this subject. Having listened to your lecture I am still confused. But on a higher level.

Enrico Fermi

“ quote fancy