

Live Board

Trends and Predictions in OOH - 2023 First Year of Full-scale “Programmatic OOH” in Japan

LIVE BOARD, INC. (Headquarters: Minato-ku, Tokyo; President and CEO: Jun Sakurai; hereinafter, “LIVE BOARD”) has joined the [U.S Digital Place Based Advertising Association \(DPAA\)](#), a global digital OOH industry association, and the [World OOH Organization \(WOO\)](#), a global OOH association in order to stimulate the Japanese OOH market, and to establish comprehensive and reliable measurement standards for advertisers and media owners in all OOH environments, including outdoor and transit. In Japan, LIVE BOARD is also a working member of the [Digital Signage Consortium \(DSC\)](#), helping to develop measurement standards. With this in mind, LIVE BOARD has published “Trends and Predictions in OOH -2023” with 1.Data, 2.Creative, and 3.Media perspectives, based on the latest global trends mainly in the U.S, the U.K, and Australia, as well as domestic research and public resources.

-Recovery of traffic flows

The “WFH” trends, driven by the impact of COVID-19, have subsided and companies are beginning to embrace the flexibility of working styles, either working from home or working in the office. Although there are shades of grey depending on companies’ working style policy, as illustrated by the case of Elon Musk, CEO of Tesla and Twitter, who instructed his employees to “come to work principle”, more companies are beginning to encourage their employees to come to work, and the flow of people in the city centre is expected to recover to a level close to those before COVID-19.

In addition, the number of overseas (inbound) tourists is expected to increase due to the depreciation of the yen and the lifting of entry requirements, while demand for domestic travel is also expected to be strong among Japanese, especially who have been reluctant to travel overseas due to the depreciation of the yen, leading to a recovery in traffic flows to major cities and tourist destinations in Japan.

-Trends of OOH

COVID-19 has had a significant impact on the OOH industry, but in recent days, we have seen an increase of OOH exposure opportunities as more people go out due to a reduction in the number of infected patients and media reports that the government policy is being lifted.

In addition to the “OOH industry trend keyword in 2022” research published at the end of last year, LIVE BOARD has predicted what will happen in 2023 from the "Data", "Creative", and "Media" perspectives.

<Trends and Predictions in OOH - 2023>

The first full year of “Programmatic OOH” in the Japanese market.

Definition of “Programmatic OOH”

An acronym that stands for Programmatic (Digital) Out Of Home.

The networking of digital OOH screens enables the efficient and effective ads exposure by integrating “data (targeting by attributions, location environments, etc.)”, “one-stop inventory management system” and “measurement metrics”.

① **Data**

-The first full year of “Programmatic OOH”.

In 2022, major DSPs including Google Display & Video360 (hereinafter, “DV360”), expanded their programmatic capabilities into digital OOH. In 2023, as more case studies accumulated and its effectiveness is recognized, more agencies will become aware of the channel and operational issues will be resolved, leading to increased recognition of “Programmatic OOH” as a major channel.



- Cross-media planning, including OOH, becomes mainstream.

Advertisers are realizing the limited reach of TV & online ads and are beginning to focus on a variety of media including OOH. On the agency side, the demand for comparable data across multiple media sectors will increase, especially when planning cross-media campaigns.

- Method for measuring OOH audiences will be standardized.

As “Programmatic OOH” deals grow, so do impression-based deals and the demand for cross-media planning. As a result, advertisers and agencies are beginning to recognize the need for consistent metrics to measure cross-media impressions, and there is momentum for measurement standardization driven by industry associations.

② **Creative**

-LIVE Streaming

As the environment for video streaming of e-sports and artists’ content through OOH has improved, the number of individuals and companies conducting LIVE streaming through OOH will increase. In addition to LIVE streaming, a synergistic effect is expected as OOH becomes an interactive medium when combined with SNS services.



- Accelerate more creatives integrated with SNS services.

In 2022, we saw a lot of creative integrated with Twitter and OOH, and in 2023, we expect to see more creatives integrated with a much wider range of SNS services such as TikTok and YouTube.

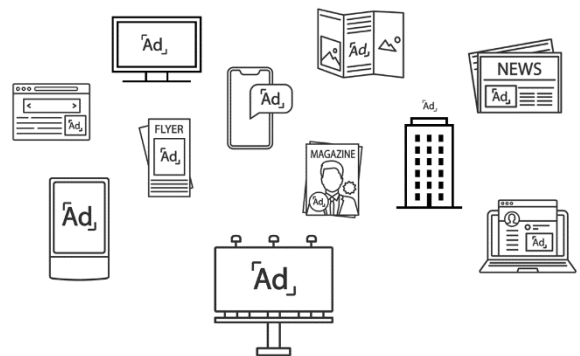
-Moments triggered creatives.

It is possible for programmatic OOH to show different creatives triggered by external data such as weather, temperature and time, increasing the number of multiple creatives for each moment in a single campaign.

③ Media

-Increasing number of media capturing audiences on the go.

With the growth of programmatic OOH, advertisers have more flexibility to access audiences on the go, leading to the development of different types of media.



-Increasing demand for environmentally friendly media (energy saving, CO2 reduction, greening, etc.)

In Europe for example, a number of initiatives are already underway to reduce CO2 emissions, including not only energy-saving OOH, but also greening the roofs of bus shelters, or installing beehives at bus stops. This trend will spread to Japan as well, with advertisers booking environmentally friendly screens for their ads.

-Increasing the relative value of OOH media.

The relative value of OOH compared to other media will increase due to factors such as the lack of interest in TV among younger generations, the slowing growth of online media, the recovery of audience flows, including the increase in the number of foreign visitors, the growth of DOOH in multiple environments including outdoor, indoor, and in-store, and a high affinity with SNS services.

As a pioneer in the Japanese OOH industry, LIVE BOARED is committed to providing useful information to advertisers, including research and verification, in order to stimulate the industry.



◆About LIVE BOARD, INC.

An operator of a digital OOH ad network that achieves data-driven targeting and effectiveness verification.

LIVE BOARD is the first company in Japan to achieve impression-based advertisement delivery in OOH. We deploy advertisement delivery and billing systems in accordance with actual conditions that are based on the estimated number of viewers "at that time, in that place, and for that specific ad," even during the COVID-19 pandemic, when people's movement patterns are prone to change. In addition, by combining big data from Japan's largest

carriers with our own network, which includes a wide range of digital OOH across Japan, including outdoor, indoor, train, and station OOH ads, we have been able to deliver personalised ads, such as targeting by gender and age, that was not possible with traditional OOH.

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