

A man wearing a dark hat and glasses is smiling as he looks at a smartphone held by a woman. The woman has curly hair and is also smiling. They are sitting at a table with a white coffee cup and saucer. The background is slightly blurred, showing what appears to be a window or a wall with some papers. The entire image has a blue overlay with geometric shapes and lines.

2019 Cuebiq Footfall Attribution Benchmarks

*Trends and Benchmarks for Marketers
Leveraging Offline Measurement*



Introduction

*Benchmarking Success Amid Increased
Offline Measurement Adoption*

Cuebiq has now released its third annual study of footfall attribution benchmarks. These benchmarks are produced via Cuebiq’s Footfall Attribution solution and are based on the analysis of campaigns across a wide range of industries. First launched in 2017, this report offers year-to-year comparisons on metrics that are designed to provide marketers with benchmarks to gauge how their advertising campaigns are performing in driving offline activities. Because the consumer journey remains predominantly offline, it’s vital that advertisers understand the offline impact and influence of their cross-channel media campaigns.

The metrics included in this report — brand uplift, visit rate, CPIV (cost per incremental visit) and dwell time — are the industry averages based on measured campaigns, giving advertisers the tools needed to understand whether their campaigns performed better, in line with or worse than their competitors’.

have helped measure consumer compatibility. But consumer compatibility comprises more than just loyalty. For advertisers to really understand how much their consumers value the brand, they need to consider additional factors such as visits to store, time spent in store, visit frequency and brand affinity. These benchmarks help advertisers not only measure ROI but also understand the relationship they have with their consumers. In this way, they can adapt their brand and future campaigns to better direct consumers to a desired point of interest (POI).

Technological advancements and methodology refinements have continued to facilitate greater accuracy in location intelligence and footfall attribution. Data confidence and independent verification have become even more important as nearly nine in 10 retailers increased their marketing budgets this past year. [\(Source\)](#)

Cuebiq is committed to providing the industry with accurate footfall attribution measurement of multi-channel campaigns. The data and benchmarks shared in this report are derived from campaigns measured throughout 2018. Comparisons to 2017 results will offer marketers greater insight into where certain retail sectors are headed and the degree of success needed to best drive consumers to store. [\(Source\)](#)

A media-agnostic player, Cuebiq functions as a third-party measurement partner, independent of media sales. All the benchmarks contained in this report are derived independently, for the sole purpose of helping the industry better measure its success.



90%

of all purchases happen
in the offline world
(US Census, 2018)

In the age of customer-centric experiences, it’s very important that advertisers understand the actual relationship between their brand and consumers. At Cuebiq, we call this “consumer compatibility.” This is not a new concept; for years loyalty programs



WHAT'S INCLUDED

As with the previous Cuebiq Footfall Attribution Benchmarks report, this study provides updated benchmarks for the following key metrics:

- **Brand Uplift:** The impact of ad exposure in driving visits to store
- **Visit Rate:** Represents the percentage of consumers exposed to the campaign that visited the store out of all exposed consumers
- **CPIV (Cost Per Incremental Visit):** Represents the budget spent to receive one incremental visit from the exposed group compared to visits from the control group
- **Dwell Time:** The amount of time spent at a specific POI, used to identify real visits vs consumers simply passing by
- **Time of Visit:** The time that the visit took place at the POI, based on local time
- **Case Studies:** Variety of case studies across different verticals that showcase the above metrics

In addition, metrics by platform and by quarter are provided, where available.

WHAT'S NEW

The following elements have been added to this year's report:

- Along with the updated benchmarks, Cuebiq is now able to provide year-to-year comparisons for the metrics in the report
- New retail categories such as Alcohol/Beverages, Apparel/Fashion, Beauty, Fine Dining, Home Furniture, Jewelry Stores and Tourism are now included
- OOH benchmarks use cases are now included
- New case studies ranging from digital to OOH and TV are now included



Footfall Attribution Benchmarks

Over the past several years, marketers have placed a great deal of emphasis on offline brand intelligence and understanding how all of the touchpoints (such as advertising across TV, digital and OOH) can drive consumers into stores. With growing interest in footfall attribution, marketers are eager to compare their campaign results with others and gauge whether or not they were truly successful. It also allows brands to measure their consumer compatibility: high-performing campaigns that drive consumers to store can be a great indicator of increased loyalty and future returns to brand locations.

Fortunately, high-quality and privacy-compliant location data at scale enables reliable footfall attribution measurement, offering brands the ability to see how their audience is reacting to a campaign in the physical world and arming marketers with actionable insights.

This section provides benchmarks broken down by vertical, platform and quarter. Derived from footfall measurement of campaigns across a number of industry verticals, these benchmarks give marketers much-needed context to determine if their campaign results are good, bad or average, helping them measure ROI and determine strategies for future campaigns.



Brand Uplift

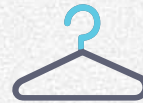
Brand uplift, which measures the impact of ad exposure in driving in-store visits, is a key metric to help marketers better understand their advertising performance. It also helps measure consumer compatibility and what type of relationship the brand has with its consumers.

Using footfall attribution reports run for Cuebiq clients between Q1 and Q4 2018 and comparing them to the same periods in 2017, brand uplift benchmarks were determined by advertising category, platform and quarter in which the campaigns ran.

The benchmarks are provided as a range. Uplift lower than the lower bound indicates low campaign performance in driving consumers to store. Uplift between the two thresholds indicates average performance. Uplift higher than the upper threshold indicates high performance.

Those categories that saw the greatest change year to year were Big Box and Pet Stores, where the average performance declined, while Pharmacy, QSR, Retail, Grocery and Gas Stations average performance increased.

To understand the ranges: In the case of Alcohol/Beverages, for example, the fact that the benchmark is low (17% for an above-average campaign) indicates that the "bar is low" for success. If a campaign scores higher than 16%, it is more effective than competitors' in driving consumers to store as a result of all beverage ad campaigns analyzed. It could also mean that overall, campaigns that were measured haven't moved the needle that much, or that consumers are less receptive to those ads. The creative and environment will always play a role in a campaign's success.



Apparel/
Fashion

2018: 17-75%

2017: N/A

The wide benchmark range in this category (58 percentage points from 17-75%) indicates that various factors may greatly sway the average uplift, such as messaging. For example, sustainability has become a very big trend in this industry. The UN has issued a Fashion Industry Charter for Climate Change, which gained support from Adidas, Gap, Target and H&M. For success in this category, it seems that advertisers must rely on strategic and innovative messaging. [\(Source\)](#)



Auto

2018: 7-47%

2017: 12-38%

Connectivity and enhanced driver experiences are trending up in the auto vertical. Consumers are buying more cars from home, indicating a new selling model for manufacturers. These trends rely on advertising to drive both visits to dealerships and to site. The 2018 benchmark range for auto shows that the bar for success is higher when compared to 2017. [\(Source\)](#)



Beauty

2018: 2-32%

2017: N/A

With trends like sustainability, diversity, convenience and transparency in cosmetic formulation, Beauty, a new category for this study, has a 30 percentage-point range but a very low bottom-of-the-range of 2%. This indicates the bar for success in this category is very low. [\(Source\)](#)

Brand Uplift Verticals & Insights



Alcohol/
Beverages

2018: 6-16%

2017: N/A

This new category for Cuebiq has a benchmark range of 10% (from 6-16%), which is the lowest of all categories measured this year. This indicates that a brand either has a better chance to outperform the average or that the bar for success is low for the category. Because this is a newly measured category, it will be interesting to see how this year's campaigns perform.



Big Box

2018: 1-19%

2017: 8-48%

Big Box retailers saw a number of closings (Toys"R"Us) and bankruptcies (Sears) this year. There were also new loyalty programs instituted and a move, such as with Target, into smaller spaces in urban centers. These moves appear to have had a major effect on the category, with both the top and bottom-of-the-range percentages for uplift decreasing in 2018. This indicates that advertisers have been less effective in moving the needle in driving consumers to store. [\(Source\)](#)

Brand Uplift Verticals & Insights



Casual Dining
2018: 2-23%
2017: 11-44%

There has been a lot of stress on the Casual Dining vertical, with consumers eating out less and rising costs. According to Food & Wine, Fast Casual is making inroads, as is dining at home. 93% of millennials eat at home four days a week. The benchmark range shows that these changes have affected advertising as well, with both the top and bottom-of-the-range percentages for uplift decreasing in 2018. ([Source](#))



C-Stores
2018: 8-32%
2017: 25-49%

Acquisitions and consolidations helped convenience retailers get bigger in 2018. As c-store retailers grew, the bar for advertising success declined. In 2017 the lowest-end-of-range for uplift was 25%, but in 2018, the lowest-end-of-range was only 8%. This indicates that advertising performance in the industry as a whole declined, which might have to do with the economies of scale as chains combine and become larger. ([Source](#))



Entertainment
2018: 3-40%
2017: 13-54%

Advertising success for this category declined a bit when compared to 2017. The lowest-end-of-range in 2017 was 13% compared to only 3% in 2018. ([Source](#))



Financial Services
2018: 5-74%
2017: 31-86%

Financial Services continues to evolve technologically with more personal banking and less footfall, more mobile transactions and better use of big data and blockchain. This category is very interesting because the wide benchmark range of 5 to 74% shows that some campaigns did poorly while some performed quite well. The wide range of success shows that innovations in the category, messaging and new banking offers play a key role in advertising performance in driving consumers to branches. ([Source](#))



Fine Dining
2018: 56-71%
2017: N/A

Unlike Casual Dining, Fine Dining advertising performance has not been affected by economic factors. The benchmark range for this new category shows that campaigns in this vertical typically perform very well. The range also shows the the bar for success is much higher compared to other categories, as the average uplift range for campaigns is 56 to 71%.



Gas Stations
2018: 22-81%
2017: 35-68%

Gas Stations are facing technological change as autos become more fuel-efficient. Year-to-year advertising comparisons show that it was harder for Gas Stations to increase footfall with a lowest-end-of-range of 22% in 2018 vs 35% last year.



Grocery Stores
2018: 5-51%
2017: 20-46%

Grocery Stores are facing higher prices, evolving due to consumer preferences and challenges from online shopping that can depress visits. Stores are getting smaller especially in urban neighborhoods, as malls fail. The data shows that more campaigns produced lower uplifts in 2018 – with the low-end-of-range this year at 5% vs 20% last year. ([Source](#))



Home Furniture
2018: 5-22%
2017: N/A

This new category is expected to maintain growth year to year with enhancements to the customer experience, whether it be immersive visual experiences, pop-ups or private-label branding. According to the data, the ability of marketers to create a successful campaign is not too strong, with the lowest-end-of-range being 5% and the top-of-range for an average campaign at 22%. ([Source](#))

Brand Uplift Verticals & Insights



Home Improvement
2018: 30-83%
2017: 13-48%

With changing demographics (DIYers tend to be millennials) and lower home ownership, this category is undergoing transition. However, advertisers are experiencing more success this year with the bottom-of-the-range percentages for uplift increasing to 30% in 2018 versus only 13% in 2017. ([Source](#))



Jewelry Stores
2018: 42-91%
2017: N/A

Technology such as augmented reality will continue to boost Jewelry Stores, as will social media and enhanced video. The benchmark range in this new category shows that advertisers are performing really well, with a 42% bottom-of-the-range for an average campaign to a top-of-the-range of 91%. ([Source](#))



Pet Stores
2018: 14-30%
2017: 30-60%

The Pet Industry overall has been growing and is responding to changing consumer tastes like specialty food, personalized services and premium items. These new trends may have affected campaigns in 2018, as we saw the bottom-of-the-range uplift fall from 30% to 14%. This means that the majority of campaigns saw lower uplift in 2018. ([Source](#))



Pharmacies
2018: 168-202%
2017: 54-81%

While there may be a lot of stress on the retail pharmacy business with consolidation among big chains and loyalty programs, these trends are not negatively affecting advertising in this category — our data actually shows the opposite. From 2017 to 2018, the bottom-range for uplift increased from 54 to 168%, indicating that the majority of advertising saw higher uplift in 2018. ([Source](#))



QSR
2018: 35-102%
2017: 12-38%

Keeping pace with changing consumer tastes is one challenge for QSRs. Another stressor is consumers' increasing predilection for off-premises ordering from third parties. However, these industry trends did not affect their advertising efforts — the bar for success was raised from 12% in 2017 to 35% in 2018, indicating that the majority of campaigns are performing very well within this category. ([Source](#))



Retail
2018: 3-56%
2017: 3-21%

General retail (brick-and-mortar) is headed to store downsizing while at the same time adopting new technology to attract shoppers and using their physical space more creatively. Ikea, Barnes & Noble and Nike announced moves into small-format stores, whether to attract urban shoppers or to create community-driven spaces. Localized products are being introduced as well as convenience, such as in-store pickup lockers and the ability to reserve products. These trends have positively affected advertising; while the lowest-end-of-range stayed the same YoY at 3%, the top-of-range for uplift is now 56% compared to 21% last year. ([Source](#))



Telco
2018: 8-69%
2017: 31-85%

When looking at the bottom-of-the-range percentages, the uplift average fell from 31% to 8%. This indicates that telco campaigns did not perform as well as they did in 2018. ([Source](#))



Tourism
2018: 5-37%
2017: N/A

Last-minute bookings and the desire for new experiences drive visits across cities, venues, hotels, landmarks and more. The bar for success for this new category is low at 5%, while the top-of-range is 37%, indicating that on average, advertising for this vertical is not generating huge uplift for brands. ([Source](#))

Uplift by Platform

With attribution analysis, it's important to understand how each channel is contributing to the overall campaign success. As marketers plan and execute campaigns across multiple channels, it's even more important to understand how each of these channels contributes to driving footfall traffic uplift.

While last year's study reported that, on average, the success bar was higher for in-app advertising because it had the highest percentages for both the upper and lower thresholds, this year it is OOH (out-of-home) compared to all other platforms.

This makes sense because OOH is ubiquitous, unskippable and often appears closest to the point of sale. This advertising channel is also benefiting from advanced technology, which now delivers more granular data from a range of sources. Notably, OOH has experienced eight consecutive years' worth of quarterly year-over-year ad spending increases, with ad revenues predicted to grow from \$9.65 billion in 2017 to \$11.5 billion in 2022, for a 2017–22 CAGR of 3.6%. [\(Source\)](#)

Advertisers increasingly have more control over the ad experience in OOH, as more venues enable dynamic insertion. As a result, OOH is seeing higher uplift. This year, as the benchmarks indicate, cross-device (web + mobile) ads rank third in uplift averages with the removal of web-only benchmarks from the report.

Platform

Uplift

Insights

Mobile-Only

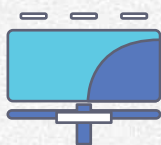


10-89%

The stakes are higher for mobile-only campaigns. The percentage-point range for an average campaign increased from 36 points to 79 points, and the top-of-range for an average campaign rose from 49% last year to 89% this year.

Compared to 2017 Results: 19-49%

OOH



80-120%

OOH was introduced in this year's study and has a high bar for success. As the channel continues to advance with better technology and data gathering, we should see this range shrink.

Compared to 2017 Results: N/A

Cross-Device (web + mobile)



6-39%

Advertisers appear to be getting less sophisticated with their cross-device advertising efforts. This year the bottom-of-the-range for an average campaign fell to 6% from 17%, and the top-of-range fell to 39% from 46%, indicating that in general, campaigns did not perform as well in 2018 as they did 2017.

Compared to 2017 Results: 17-46%

Uplift by Quarter

While Q1, Q3 and Q4 remained fairly consistent year to year, Q2 saw a precipitous drop in uplift year to year. Various reports showed that Q2 2018 saw greater vacancy rates and store closures. This may explain the drop in uplift.

Median Uplift by Quarter

Quarter

Median Uplift

Insights

Q1

19%

Because advertisers tend to spend more during the holiday season in Q4 and spend less during Q1, it makes sense that Q1 uplift remained about the same.

Compared to 2017 Results: 20%

Q2

25%

From various reports it looked like Q2 2018 took a hit, which is reflected in this year-to-year dive in uplift percentages. Retail store vacancy rates increased dramatically, which could be one reason for the decline.

Compared to 2017 Results: 63%

Q3

33%

Besides back-to-school budgets, advertisers tend to spend a little bit less in the summer months as they ramp up their budgets to capture holiday shoppers in Q4.

Compared to 2017 Results: 37%

Q4

60%

Holiday shopping appears to drive this quarter, as it has high-percentage uplift for both years.

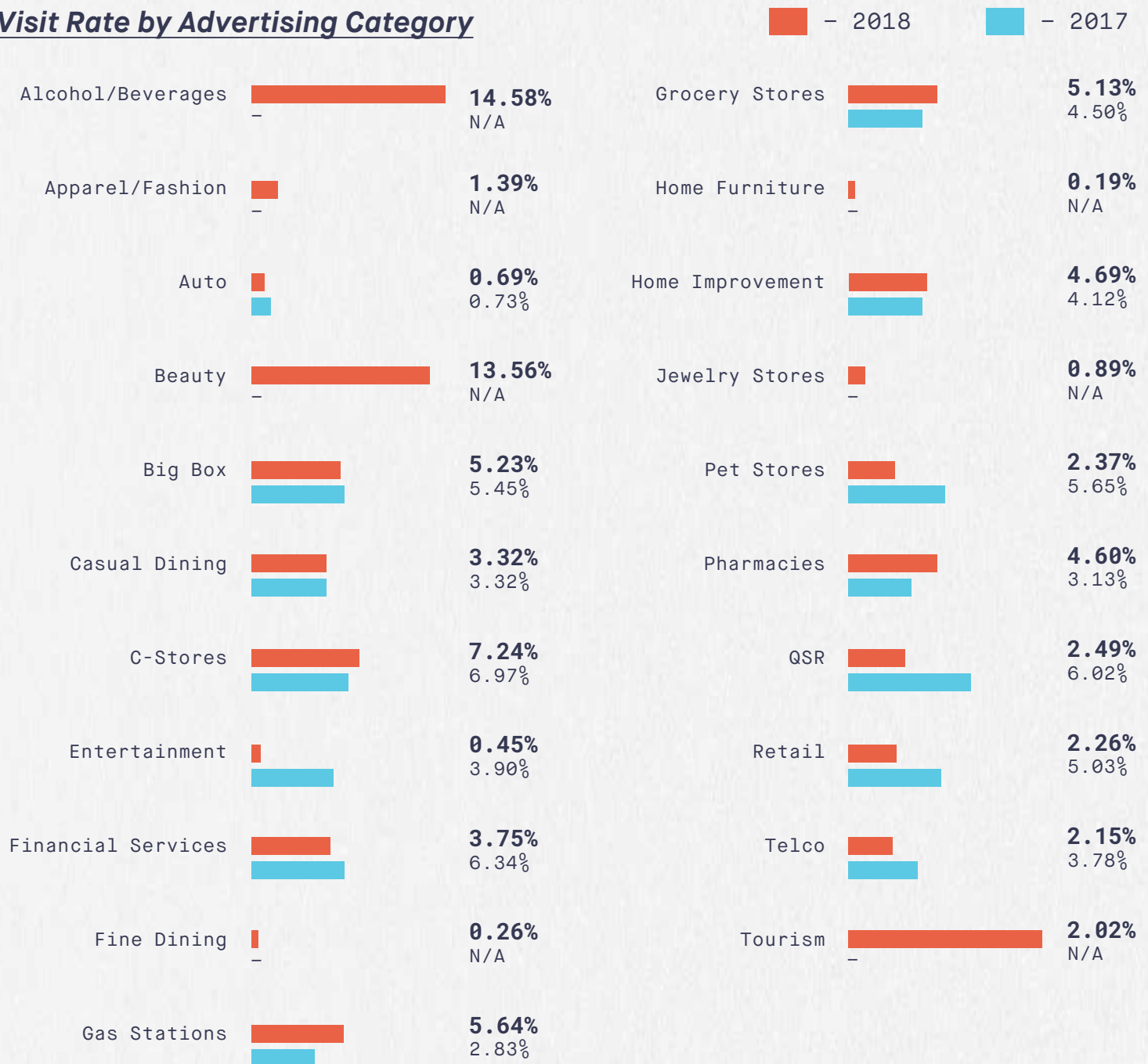
Compared to 2017 Results: 57%

Visit Rate

Visit rate identifies the relationship between ad impressions and in-store visits. Based on analysis of campaigns that Cuebiq measured throughout the year, we identified daily average visit rates for several verticals. These values can be used as a baseline when evaluating how campaigns are performing in driving consumers to store.

When looking across all categories, Q4 2018 continued to see the lowest overall average visit rate for the entire year, as it did in the previous year. This may indicate continued (and increasingly traditional) online purchasing during the holiday season. The other three quarters had similar median visit rate levels in 2018, while rates in 2017 were very different quarter to quarter. This may indicate a more ubiquitous trend in consumer shopping where purchasing behaviors are the same no matter what the season or quarter.

Visit Rate by Advertising Category



Visit Rate

The new category of Alcohol/Beverages ranked No. 1 among all categories in visit rate in 2018 with 14.58%, followed by another new category, Beauty (13.56%), and Convenience Stores (7.24%).

Note: the Alcohol/Beverages category was based on campaigns driving to third-party stores offering alcohol and beverages.

The lowest-performing categories in 2018 were the newly measured categories of Home Furniture (0.19%) and Fine Dining (0.26%), followed by Entertainment (0.45%).

QSR (5.65% to 2.49%), Entertainment (3.90% to 0.45%) and Pet Stores (5.65% to 2.37%) showed the greatest declines year to year, while Gas Stations (2.82% to 5.64%) and Pharmacies (3.13% to 4.60%) showed the greatest gains.

As with our uplift analysis in the previous section, it's also important for marketers to understand the difference in visit rate by platform. In 2018, the three platforms analyzed had very similar levels of visit rates. In 2017, the visiting levels had greater differences by platform. Comparing year-to-year performance, both in-app and cross-device showed declines.

Visit Rate by Platform

In-App



3.24%

Compared to 2017 Results: 4.21%

Cross-Device



3.66%

Compared to 2017 Results: 4.03%

OOH



3.52%

Compared to 2017 Results: N/A

Median Visit Rate by Quarter

Q1	Q2	Q3	Q4
3.48%	3.72%	3.91%	2.72%

Compared to 2017 Results

3.52%	3.52%	3.37%	2.61%
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Cost Per Incremental Visit

Marketers looking to measure their ROI can leverage Cuebiq's attribution analysis to measure their cost per incremental visit (CPIV). This metric represents the budget spent to receive one incremental visit from the exposed group, compared to visits from the control group. As marketers experiment more with location data to target consumers, CPIV will play a major role in determining just how much value they receive from their investments.

Based on the analysis of campaigns measured by Cuebiq throughout 2018, the median CPIV across all verticals was \$13.71. Automotive had the highest CPIV (\$291.02), followed by Home Furniture (\$114.86) and Grocery Stores (\$76.75), indicating that a higher investment is typically needed to drive consumers to visit these stores. Automotive had the biggest increase year to year from \$36.64 to \$291.02, followed by Grocery Stores (\$22.14 to \$76.75), indicating that consumer purchasing behavior is changing rapidly, often because of technology that encourages more online purchasing and fewer store visits.

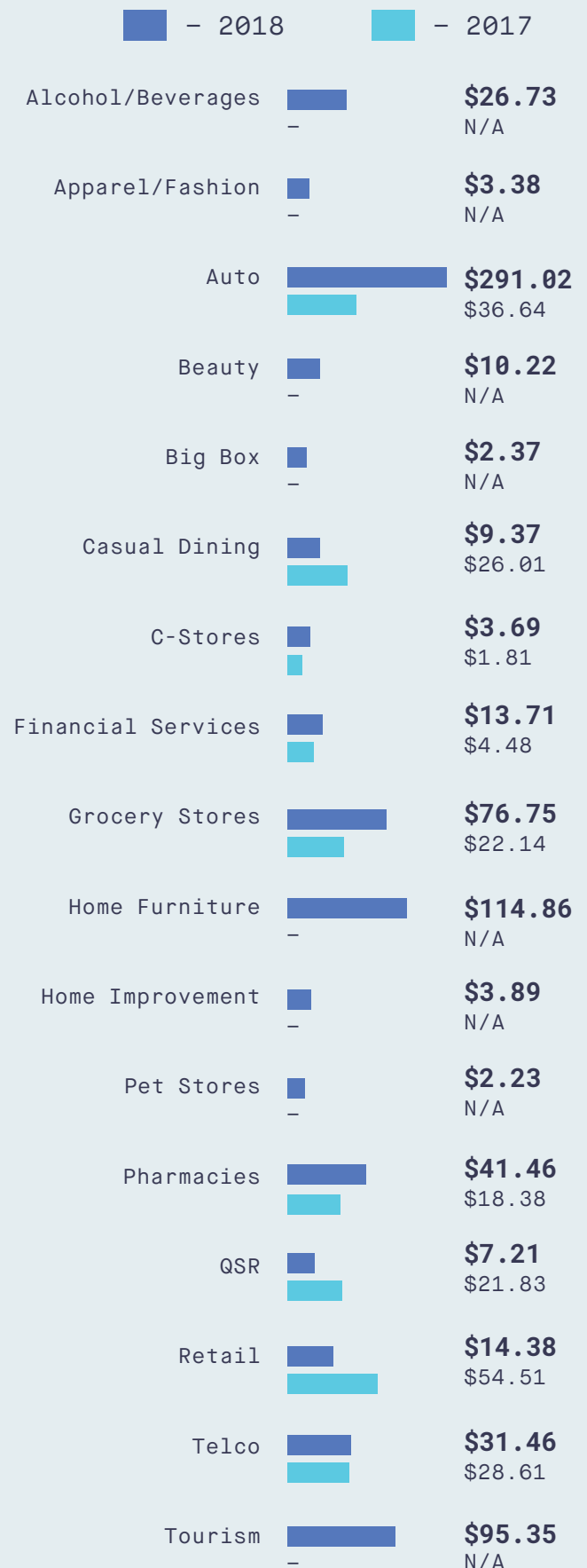
Meanwhile, Pet Stores (\$2.23), Big Box (\$2.37) and Apparel/Fashion (\$3.38) all had lower CPIVs compared to other categories.

Please note that Cuebiq is media-agnostic. In order to generate this metric (CPIV), brands must submit their budget for the campaign. Not all do so. Therefore this metric is based only on those campaigns in which our clients shared their budget.

OOH had the highest CPIV (\$22.83), which makes sense since OOH spans many platforms and measurement companies. In-app was the lowest (\$8.18).



Median CPIV



Dwell Time

While brand uplift and visit rate are the foundation of footfall attribution analysis, they only scratch the surface of the possible use cases for precise location-based data. Cuebiq's data collection methodology and offline intelligence platform allow brands to look at how long consumers spend at retail locations. By measuring the average time spent at locations by advertising category (dwell time), brands can measure how long consumers are spending in their stores compared to the industry average, and if they are achieving their on-location goals.

Dwell time is also a great indicator of how compatible brands are with their target consumers. For brands that have higher dwell times, it shows that their retail locations are optimized toward a better consumer experience while in-store (note: dwell time varies for each category and brand). A great advertising campaign across all the right media channels can drive more visits; however, it's vital that brands offer a good consumer experience while in-store to not only drive purchases but also repeated visits and increased loyalty.

There are different factors to consider when looking at dwell time. Some convenience retail outlets pursue

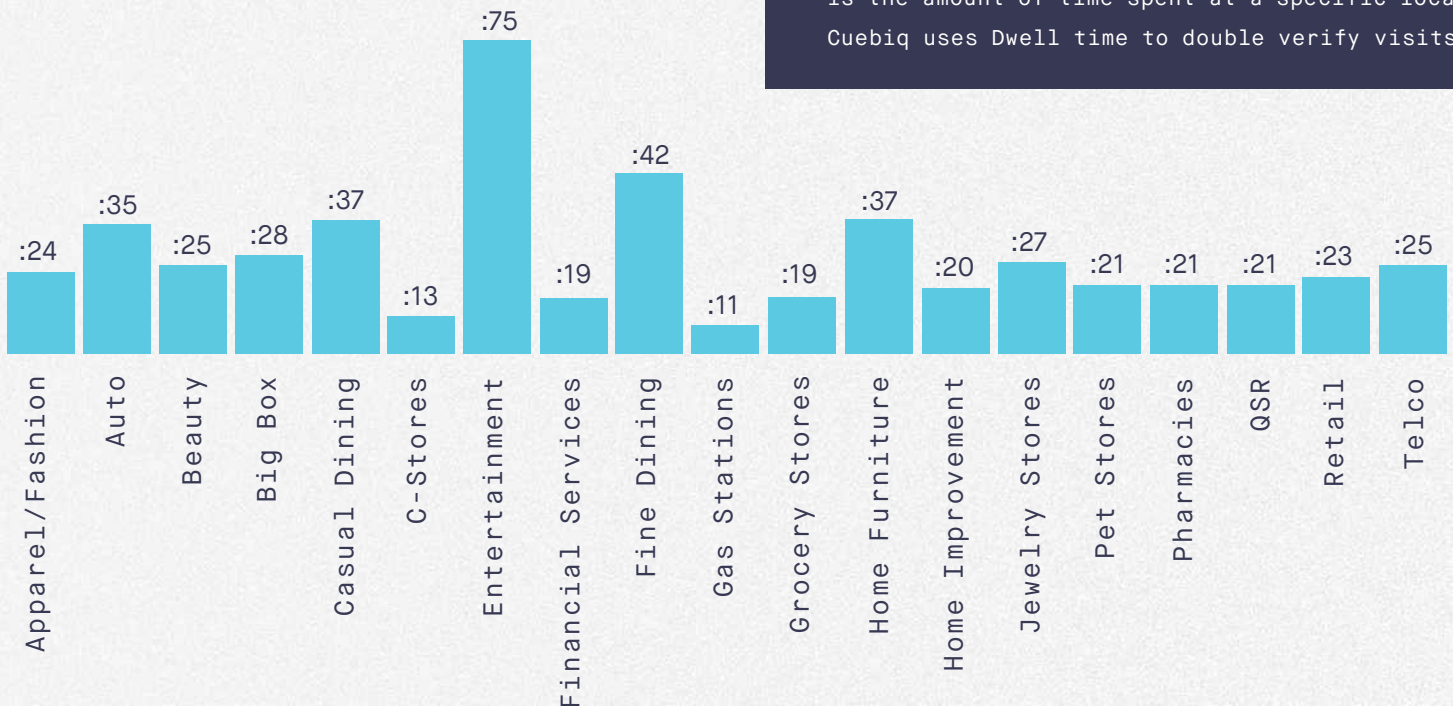
shorter visits, ensuring that customers can get in and out — longer dwell times indicate long lines and wait times, leading to a bad in-store experience. The significance of dwell time can vary in a retail environment; short dwell time may signal that a consumer found what they wanted quickly and made a purchase, but it could also signal that they left quickly without making a purchase. Advertisers will always need to compare their dwell time against their goals to ensure that they are spotting any potential problems with the in-store experience. In high-competition verticals, understanding dwell time can make all the difference between growing revenue or watching it slip away to the competition.

Entertainment (understandably, with long-form programming such as movies) ranked No.1 in dwell time for both studies, with ample growth year to year. Other top-performing categories included the new categories of Fine Dining (ranking No. 2 this year with :42) and Home Furniture (:37), each of which require more time for consumption and consideration.

Gas Stations had the shortest dwell time this year (:11) followed by Convenience Stores (:13), which makes sense since they both strive for conveniently fast transactions.

DWELL TIME

is the amount of time spent at a specific location. Cuebiq uses Dwell time to double verify visits.



Time of Visit

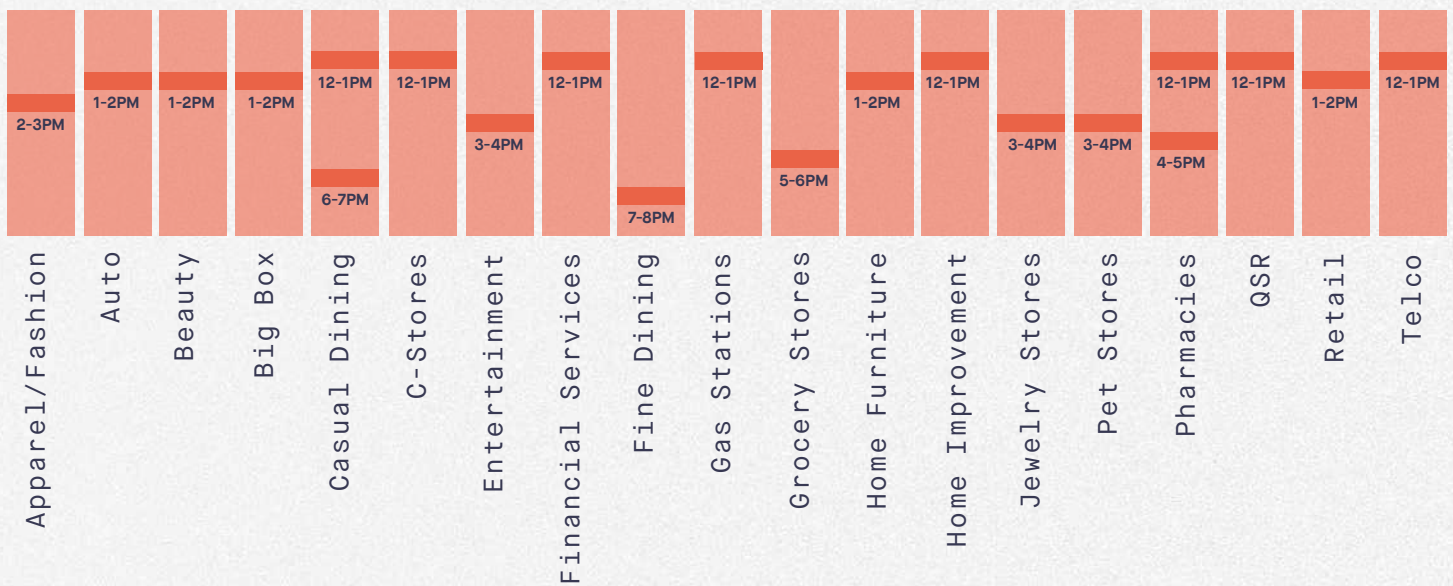
Another valuable metric for measuring campaign success is time of visit. For example, if a fast-food chain ran a campaign to promote a breakfast item and found that the top time of visit was 1 p.m., it's clear that the campaign was not successful in driving to store for the specific time window it was targeting, even if it drove a higher visit rate overall.

Use cases like this don't apply to every vertical, but monitoring the most popular times to visit a store can help the brand determine the best times of day to purchase media for reaching consumers. It should also influence staffing decisions, addressing any potential on-location issues and thereby increasing the likelihood of a higher dwell time.

Categories that significantly changed their time of visit year to year were Big Box (from 5–6 p.m. to 1–2 p.m.), Home Improvement (6–7 p.m. to 12–1 p.m.), Pet Stores (6–7 p.m. to 3–4 p.m.) and Telco (6–7 p.m. to 12–1 p.m.). This may reveal new shopping patterns, such as consumers rushing to a Telco store in the middle of the day (or during their lunch hour) to fix a phone, or to a Big Box or Home Improvement store to pick up household items.

Notably, Casual Dining, which last year concentrated at the 7–8 p.m. dinner hour, now has two predominant times of visit — 12–1 p.m. and 6–7 p.m. — indicating that more people are also dining out for lunch.

Time of Visit Verticals



Leverage time of visit insights to reveal new shopping trends to optimize daypart targeting.



Offline Intelligence: Case Study Collection

Footfall Attribution for All Media

According to [eMarketer](#), global digital ad spend is projected to rise a healthy +17.1% to \$327.28 billion in 2019 versus last year, with three main companies leading the charge: Alibaba, Facebook and Google. eMarketer also predicts that Google will become the first digital ad seller to cross the \$100 billion mark in net digital ad revenues.

Furthermore, mobile will play a significant role in total media ad spending, achieving \$232.34 billion in 2019. eMarketer states that, for the first time, over one-third of ad dollars worldwide will go to mobile in 2019, spurred by high mobile internet adoption and improving mobile internet speeds. In conclusion, as ad spending in mobile increases, it will push past digital to receive over 50% of ad dollars in 2020.

These trends are spurring traditional media players and advertisers to continue in their efforts to test and adopt methods that address the challenges of a fast-changing, data-driven and zero-based budgeting world. Marketers are pressed to prove substantial ROI for their activations. Fortunately, the continued expansion of new tools and data sources such as location data and footfall attribution is strengthening the value of traditional media and helping both marketers and their media counterparts better plan and measure their investments.

Because the consumer journey happens across multiple channels and platforms, marketers need to understand how each form of media affects store visits, and how different combinations drive ROI ... or fail to do so. Location data that attributes the role each channel plays in the campaign outcome ensures that marketers are developing the optimal media mix for their future campaigns and brand goals.

Let's look at how marketers are turning offline intelligence into action to measure offline ROI, optimize their media mix, A/B test audience segments, drive more in-store visits and much more.

This section includes a collection of case studies across this report's advertising verticals, which include digital, out-of-home (OOH) and television platforms. All can be measured against the Cuebiq benchmarks.

Case studies provide a real-life example of the efficiency and success of a campaign that can answer questions such as:

- How many exposures of the creative did it take to spur a visit?
- Did the campaign hit the attribution benchmarks by vertical?
- Should strategies change based on the affinities for other brands?
- How do the results look at key intervals during the life of the campaign, not just at the end?
- When is the best time to push marketing messages by time of day and by day of week?
- How do real-time behaviors compare over time and across platforms?

Ultimately, the information gleaned from the case studies helps optimize audiences based on data-driven insights about how the campaign impacts visits. Marketers can magnify their efforts based on what works, eliminating inefficiencies and increasing value. The measurement results can be used to prove ROI as well as inform future actions.

Cuebiq Helps Centro and a Leading Convenience Store Brand Measure Campaign Effectiveness

A leading Midwest convenience store chain wanted to launch a year-long campaign designed to drive greater in-store foot traffic. In addition, they wanted third-party verification to measure the campaign's effectiveness. Centro, a global provider of advertising technology, partnered with Cuebiq to target consumers throughout the campaign and measure the advertising effectiveness in order to drive incremental visits to store. The campaign ran between January 15 and September 30, 2018.

To reach the brand's target audience, Centro first leveraged Cuebiq's data on the following segments: convenience store shoppers, coffee lovers, QSR frequent diners and pizza lovers. These audiences were targeted and optimized throughout the campaign using Cuebiq's Visit Optimization tool, which allowed the brand to understand in real time which segments had the

highest conversion rate to in-store visits. From there, the campaign shifted from audience impressions to those consumers who were actually driving more conversions, thus increasing efficiencies and driving incremental visits to the convenience store.

Additionally, at key intervals throughout the campaign, Centro leveraged Cuebiq's Attribution solution to measure the overall advertising effectiveness in driving store visits. Cuebiq audiences were strategically targeted, which allowed the match rates of the exposed consumers to triple over time, starting at 11% and rising to 34%. The higher match rates allowed Cuebiq to observe more exposed users throughout the life of the campaign, thus creating stronger analysis and takeaways for the convenience store brand.

The Results:



Uplift

Visit uplift for each segment of the campaign was significantly above the average benchmark for the Convenience Store vertical, with the three campaign segments achieving a strong

120%, 136% and 134%
visit uplift.



Consumer Insights

On average, throughout each campaign segment, 45% of exposed consumers visited a store within three days. Additionally, for all three campaign intervals, the brand saw a higher visitation rate during the weekend vs weekday.



Brand Affinities

Top brand affinities for consumers exposed to the campaign were for Walmart, Subway and Econolodge, indicating potential synergies for future campaigns.



Optimization

Based on the impressions served and visit rate chart, the impressions that drove the highest rate of visits were served early in the morning, suggesting timing strategies for the ad push.

Cuebiq Helps Dstillery Optimize Casual Dining Restaurant's Ad Effectiveness

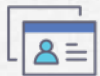
A leading casual dining brand wanted to drive restaurant visits as well as increase both website traffic and online orders by targeting their brand-loyal consumers across the US. To achieve this, Dstillery, a leading applied data science company focused on insights and media, partnered with Cuebiq to measure both offline ad effectiveness and consumer engagement. The campaign ran between January 1 and May 31, 2018.

The Results:



Uplift

The campaign saw a 206% visit uplift, which was significantly above the benchmark for the Casual Dining vertical.



Consumer Insights

On average, 32% of exposed consumers visited a store within six days. Interestingly, the converted consumers also had a strong correlation with the Auto vertical, with Auto buyers being the most popular segment for uplift. This offered the casual dining brand a strategic opportunity to blend future marketing efforts with automotive attributes.

206%

BRAND UPLIFT

dstillery



Cuebiq Partners With Viant to Measure Home Furniture Brand's Ad Effectiveness

A leading home furniture brand launched a three-month, geo-targeted media campaign with a goal to achieve uplift in driving visits to their locations as well as measure the level of consumer engagement with their brand. The home furniture brand partnered with Viant and Cuebiq to measure offline ad effectiveness and consumer engagement. The campaign ran between July 1 and September 29, 2018.

The Results:



Uplift

The campaign saw a strong 39.34% visit uplift that far exceeded the verticals for the Home Furniture category.



Consumer Insights

On average, 30% of exposed consumers visited a store within six days. Additionally, 76% of all users spent between 10–52 minutes in store.

Cuebiq data showed that converted consumers also had a strong correlation with the Auto vertical, with Auto buyers being the most popular segment for uplift. This offered the brand greater insights into how best to target future consumers strategically as well as the type of media best able to target auto intenders.

76%

USERS SPEND 10-52 MINUTES
IN STORES



Cuebiq Helps Measure Apparel Brand's Ad Effectiveness

A leading apparel brand launched a two-month national campaign in order to drive more consumers to their retail locations across the US. The brand partnered with Cuebiq to measure offline ad effectiveness and consumer engagement with a campaign that ran between August 1 and September 30, 2018.

The Results:



Uplift

The campaign saw a strong 112.82% visit uplift, which was above the average for the Apparel category vertical.



Visit Rate

The visit rate of 1.36% was about average for the vertical.



Consumer Insights

On average, 39% of exposed consumers visited a store within six days. Additionally, 73% of all users spent between 3–32 minutes in store.

The results showed that converted consumers also had a strong correlation with the financial vertical, with retail banking consumers being the most popular segment for uplift. This offered the apparel brand an opportunity to target future consumers better with messaging and place ads in line with more financially affiliated target audiences.

112%

BRAND UPLIFT



Cuebiq Helps Aki Measure CPG Brand's Ad Effectiveness

A leading CPG brand was looking to grow awareness and consideration for their product in order to drive more consumer visits to big-box locations. The brand partnered with Aki and Cuebiq to measure ad effectiveness and consumer engagement for their nationwide campaign which ran between March 16 and July 31, 2018.

The Results:



Uplift

The campaign saw a 44.54% visit uplift, which greatly exceeded the Big Box category average.



Visit Rate

The 9.45% visit rate greatly exceeded the Cuebiq category level for Big Box stores in general.



Consumer Insights

On average, 34% of exposed consumers visited a store within three days. Additionally, 80% of all users spent between 5–33 minutes in store, with the majority of visits happening during the afternoon. This helps the brand deliver messaging more strategically by time of day.

Interestingly, converted consumers also had a strong correlation with the retail vertical, with grocery shoppers, CES buyers and home improvement / DIY shoppers all being among the most popular segments for uplift. Knowing this, the brand can now strategically partner with brands from those categories as well as target those media outlets and content that reach those other consumer segments.



80%
OF USERS SPEND 5-33
MINUTES IN STORE

Cuebiq Helps Amobee Measure Luxury Auto Brand's Ad Effectiveness

A leading luxury Auto brand wanted to increase footfall traffic to local dealerships as well as understand the ad effectiveness for larger-scale local campaigns. The brand partnered with Amobee and Cuebiq to measure offline ad effectiveness and consumer engagement for their local campaign, which ran between March 23 and December 31, 2018.

The Results:



Uplift

The campaign saw a strong 64.59% uplift, which was significantly above the average for the Automotive vertical.



Consumer Insights

On average, 38% of exposed consumers visited a store within three days. Additionally, 21% of all users spent between 48–92 minutes at the dealership, with the majority of visits happening during the afternoon on the weekend. The information gleaned from the visit rate, dwell time and time of day results enabled the brand to deliver their messaging where it would reach the right consumer at the right time.

Converted consumers also had a strong correlation with the entertainment vertical, with movie goers and live sports fans being among the most popular segments for uplift. This insight provided more opportunities for future marketing platforms.

64.59%

BRAND UPLIFT





OOH & TV: Case Studies & Use Cases for Traditional Media Channels

With the advancements made in OOH data availability, collection and measurement, Cuebiq expanded its metric capabilities in this year's study by adding OOH and TV case studies and use cases.

While media measurement across platforms continues to be developed, the need for marketers to have a clear idea of who they are reaching on which platform at the right time and place is becoming critical. Cross-platform users now outnumber their single-touchpoint peers globally and account for nearly 65% of digital users in the United States alone, which is why advertisers need to invest their media across multiple channels to reach the right audience. ([Source](#))

The following case studies more fully examine the impact of OOH and television on driving consumer traffic and purchase intent to a brand's POI.

Cuebiq Partners with Clear Channel Outdoor to Measure QSR Brand's OOH Ad Effectiveness

A leading regional QSR chain wanted to understand the impact of their OOH media efforts by measuring ROI and gaining insights from consumers exposed to the messaging. The brand partnered with Clear Channel Outdoor and Cuebiq to measure their OOH ad effectiveness and consumer engagement with a campaign that ran between June 25 and August 29, 2018.

The Results:



Uplift

The campaign saw an impressive 379% uplift, which exceeded the category benchmarks.



Consumer Insights

What's especially interesting is not only that the campaign generated massive uplift, but also that it immediately drove consumers to the restaurant. Of the majority of consumers exposed to the ad, 65% visited a brand location (conversion rate) within one day.

The converted consumers also had a strong correlation with the travel and hospitality categories, with vacationers, upscale-hotel stayers and frequent air flyers being among the most popular segments for uplift. Understanding these affinities will help this brand further refine their ad placements and targeting in the future.

65%

OF CONSUMERS VISITED A BRAND LOCATION WITHIN 1 DAY OF AD EXPOSURE



Cuebiq Partners with Clear Channel Outdoor to Measure Ad Effectiveness for Their OOH and Mobile Campaign

A leading fitness brand wanted to drive visits as well as more fully understand the impact of their OOH and mobile media efforts. To that end, Clear Channel Outdoor partnered with Cuebiq to measure the uplift for a combined campaign of OOH media and mobile strategic investments. The campaign ran between April 9 and June 3, 2018.

While each channel had a positive performance independently, the combination of OOH and mobile retargeting had even greater impact with skyrocketing lift, thus proving the immense value of a multi-platform strategy. By combining mobile targeting capabilities with a rich location data set, the brand can continue to leverage this tactic across future campaigns.

The Results:



Mobile-Only:

- The visit lift was 69.76%, which is generally higher than most verticals.
- The visit rate (exposed) was 0.39%, while the visit rate (control) was 0.23%. This indicates that exposure to the ad campaign on mobile significantly drove visits to the POI.



OOH-Only:

- The visit lift was an impressive 303.24%, much higher than other Cuebiq verticals.
- The visit rate (exposed) was 2.8%, which was significantly higher than the visit rate (control) of 0.69%. This indicates that exposure to the OOH ad campaign successfully drove visits to the POI.



+



A Combination of Both Mobile & OOH:

- **Uplift:** The visit lift was an impressive 554.71%, vastly exceeding average benchmark verticals for all brand categories.
- **Visit Rate:** The visit rate (exposed) of mobile and OOH combined was 4.15%, compared to mobile-only (0.39%) and OOH-only (2.8%), demonstrating the strength of this multi-platform campaign. The visit rate (control) was 0.63%, compared to mobile-only (0.23%) and OOH-only (0.69%).
- **Consumer Insights:** In addition to the impressive uplift the campaign generated, actual conversion was immediate for those users exposed to the advertising. Forty-two percent of exposed consumers visited a location within one day and these converted consumers also had a strong correlation with the Auto vertical, with actual Auto buyers ranking No. 1 for uplift.

↑ 554.71%

BRAND UPLIFT (MOBILE & OOH)

Hulu Partners With Cuebiq to Measure Leading QSR Brand's Ad Effectiveness

One of the questions that brands face when running connected TV media spend is, "Did my TV media buy drive visits to my stores?" To help answer that question, Cuebiq measured the effectiveness of a popular QSR's marketing campaign on leading premium streaming service Hulu.

The campaign successfully ran on Hulu and was delivered to consumers across OTT, desktop and mobile. Cuebiq then measured its effectiveness in driving consumers to store by providing key performance indicators such as visit uplift, visit rate and impression effectiveness. There was also a greater focus on more granular insights such as performance by geography, time of visit and audience affinities. Over half a million exposed users were observed for the duration of the QSR campaign from 10+ million impressions collected via pixel, which resulted in actionable, statistically significant takeaways from the campaign's performance.

The Results:



Visit Uplift

The brand saw 13.68% visit uplift from the exposed users compared to the control group. This compared favorably to mobile and cross-platform uplift success ranges.



Consumer Insights

37% of users converted in 4+ days, with 19% converting within a day. Afternoons were by far the busiest times compared to mornings and evenings, with the exposed group offering insights into the best time for ads on this television platform. Converted consumers also had a correlation with being frequent flyers. Over 90% of these consumers had an interest in retail stores, especially Big Box, which was the most popular segment for uplift.



37%

OF USERS CONVERTED
IN 4+ DAYS

Cuebiq Helps Leading QSR Brand Measure TV Advertising Performance in Driving Store Visits

A leading QSR brand wanted to drive visits around a day-specific promotion that targeted both the general and Hispanic markets. In addition, the brand wanted to ascertain visit uplift as granular as the DMA-level, as well as performance by network and show. The linear TV results from this campaign proved that Spanish-language programming and weekend programming, specifically movies, were more efficient in reaching consumers who converted.

Cuebiq measured campaign performance in driving consumer traffic to the restaurant by daypart, network, program and creative, and deliverable KPIs such as visit uplift, visit rate and walk to rate. Through the use of one of the largest first-party, anonymous user bases that has more than 72 million active users per month and over 13 million households, Cuebiq's footfall analysis provided the highest level of statistical significance currently available in the marketplace.

The Results:

- Tuesday promotions were especially successful, with a spike in visits on October 9, specifically.
- Spanish-language programming drove the most visits, while also providing high uplift in the hip-hop awards show where the brand had advertising presence.
- Weekend programming, specifically movies, is more efficient in reaching the brand's consumers.

The overall campaign had a 19% uplift, which compared favorably with mobile and cross-platform uplift levels. The top programs in driving visits were Titulares y Mas fin de Semana on Telemundo, Grey's Anatomy on ABC and Mayans on FX.



Methodology :



About Our Data Collection Methodology and Analysis

Cuebiq collects anonymous location data via its proprietary SDK technology, which has been integrated in 220+ mobile apps, reaching a vast and diverse base of opted-in, anonymous users, one in three U.S. smartphone users.

By teaming up with apps using precise location, Cuebiq's data collection methodology leverages GPS and Wi-Fi signals to collect anonymous offline behaviors at scale. We analyze the data to determine dwell time and visit frequency at locations and create the most accurate geo-behavioral data set at scale available in the marketplace today.

Our data collection is privacy-compliant; we only collect anonymous data from opted-in users and provide them an easy way to opt-out were they to change their mind. We are at the forefront of industry privacy standards and we're one of the very first location providers who was certified by the NAI, the leading privacy association in the United States. Cuebiq is also certified by TrustArc and TAG, and Privacy Shield registered.



How Cuebiq Verifies Visits: The Double Verified Approach

Verification #1: Collecting Accurate + Precise Location Data Points

Once anonymous users opt in, Cuebiq's SDK leverages GPS and Wi-Fi- signals to collect location data. This is the first step to confirm a visit for Cuebiq, and typically the only visit verification used by many other location providers.

Verification #2: Determining an Actual Visit Based on Dwell Time & Type of Location

The next step to double verify the visits is what truly sets Cuebiq apart, thanks to our proprietary data collection methodology, which allows us to understand when users "dwell" and when they "move." When users spend time at the same location, we measure the "dwell time," which we then use to filter out "fake visits," or users who are merely passing by.

For example, five minutes at a coffee shop might be a true visit, but five minutes at a movie theater is not. Our double-verification process gives our clients a more accurate picture when measuring ROI. Understanding that consumers are actually spending time at a location — versus just passing by — is key to effectively measuring offline impact and a key Cuebiq differentiator.



About Our Attribution Methodology

Our Attribution solution helps client measure campaign ROI and determine strategies for future campaigns. Footfall attribution analysis enables them to see how their audience is reacting to a campaign in the physical world and evaluate it for the future.

In order to determine if campaigns are effectively driving more visits to store, we use the control vs exposed methodology. The exposed group includes all users exposed to the campaign, whereas the control group is composed of non-exposed users with matching attributes to the exposed group. We then observe both groups' behavior for the duration of the campaign, and the analysis of how each group behaves allows us to determine the visit lift generated by the campaign.



Our Commitment to Privacy

At Cuebiq, we have embraced privacy as a core value since day one, making our commitment to protecting consumers' privacy part of our mission. As the regulatory landscape evolves, from GDPR to CaCPA and beyond, our Privacy team has been focused on remaining at the forefront of global industry standards. In order to do so, we have grounded ourselves in four key principles that guide all of our efforts.

Our key principles include consent, transparency, control and accountability:

- **Consent:** We only collect non-personally identifiable data from users who opted-in to collect and use their information.
- **Transparency:** Our partners clearly articulate their relationship with Cuebiq in their Privacy Policy. Cuebiq and our partners provide clear, understandable descriptions of what information is collected, what may be done with it, with whom it may be shared, and what options consumers have in those regards.
- **Control:** We allow users to easily opt-out through several paths: app settings, device settings, TrustArc and the Cuebiq App.
- **Accountability:** Accountability is an organization's ability to demonstrate its privacy program and the steps taken to ensure compliance. Cuebiq is a member of the NAI, both TrustArc & TAG certified and Privacy Shield Registered.

Glossary

Accuracy: Accuracy is how close the location provided is to the actual location. If we place the user at 55 Grand Street, that is being really precise, but the accuracy may not be right because the user might actually be at 125 Houston Street, which is a few blocks away.

Attribution: Attribution is the science of determining which marketing tactics are driving consumer action. In our attribution studies, we leverage offline intelligence derived from our location data to draw conclusions on whether the campaign was successful at increasing foot traffic to the advertised stores.

Control Group: The control group is comprised of users who closely mirror the exposed group's geo-behavioral characteristics and demographics, but were not exposed to the campaign. This is also referred to as the unexposed group.

Cost Per Incremental Visit (CPIV): This metric represents the budget spent to receive one incremental visit from the exposed group, compared to visits from the control group.

Dwell Time: This is a term first introduced by Cuebiq in 2015 to identify the amount of time spent at a specific Point of Interest (POI). Dwell time is used to qualify visits. For example, we do not want to qualify a "visit" to a POI if the user just window shops, walks by or spends less than a certain amount of time at the POI. Minimum dwell time requirement varies on the vertical. We also analyze dwell time to understand how long a visitor spent at the POI.

Exposed Group: The exposed group is comprised of users who were exposed to the campaign.

Footfall Traffic: Footfall traffic is the measurement of the number of people entering a brick-and-mortar location.

POI (Point of Interest): A point of interest, or POI, is a specific location, usually a store or business, that we are analyzing visits to in our study.

Precision: Precision means exactness on a map. It is the difference between placing a user at 55 Grand Street vs somewhere on Grand Street vs somewhere in Lower Manhattan. Precision is expressed using lat/long coordinates; the more decimal places you have, the more precise your location is.

SDK (Software Development Kit): An SDK is typically a set of software development tools that allows the creation of applications for a certain software package, software framework, operating system or similar development platform. It is used to enrich applications with advanced functionalities, advertisements, push notifications and more. In Cuebiq's case, our SDK is designed to understand offline visitation patterns of anonymous, opted-in users at scale in order to provide aggregated trends and advertising measurement.

Visit Rate: In broad terms, visit rate identifies the average daily POI visits by category (e.g. each weekday/weekend, on average X% of the US population visited a POI pertaining to the specified category.) When referring to users exposed to the campaign, such as in the case of the benchmarks provided in this report, *Exposed Visit Rate* identifies the percentage of unique devices exposed to the campaign (aka exposed group) that visited the POI, out of the total number of unique devices exposed to the campaign.

Visit Uplift: Visit uplift measures the impact of ad exposure in driving in-store visits. It is the percent difference in visitation rates between the exposed and unexposed groups and it is a key indicator of how successful the campaign was in driving store visits. It is determined by comparing two groups of users: those who saw the ad campaign (the exposed group) and those users who did not see the campaign (the control group). If more users from the exposed group went to an advertiser's desired point of interest (POI) compared to the control group, then there would be a positive uplift. Conversely, if more control group users went to the POI, then the campaign had no impact on store visits.



About Us

Cuebiq is a consumer insights and measurement company that helps brands win market share and measure ROAS by mapping and measuring their consumers' journey.

Cuebiq's SaaS platform provides clients offline brand and competitive intelligence, real-time campaign optimization and footfall attribution, and geo-behavioral audiences for cross-platform ad targeting. Cuebiq is headquartered in New York with offices in San Francisco, Chicago, Italy and China.

Cuebiq is also a leader in utilizing data and insights in the service of a variety of causes through its "Data for Good" initiative. The company shares location intelligence with researchers at top universities and nonprofit organizations to drive innovation for causes such as improving quality of life in underserved communities, natural disaster response, and smart city development.

To learn more, please contact us at cuebiq.com/contact

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