

Media Plan Optimization

Analysis of Incremental Increase in OOH Share

ROI Analysis: Sales – Brand Awareness – Consideration – Purchase Intent

October 2024

Project Summary

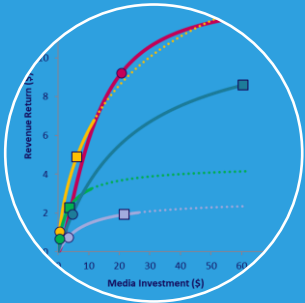
This report explores the impact of **incremental reallocation of budget** to achieve media plan optimization

- A prior 2023 study confirmed the importance of OOH in the media mix and determined that historical under-allocation of budget to OOH prevented overall media plan optimization. Findings included OOH:
 - Delivered a strong Return on Ad Spend (ROAS) or Sales ROI that can improve overall campaign ROAS
 - Drove improved brand perceptions throughout the marketing funnel
- The study was conducted utilizing comprehensive econometric modelling, to build response curves by media channel to identify the optimal media mix to drive both Sales as well as a range of brand metrics (including Brand Awareness, Brand Consideration and Purchase Intent) and to more fully understand the role of OOH in the media mix. Three categories were evaluated within this study: Automotive, CPG Food, and Retail Grocery.
- The 2023 analysis provided ROAS numbers by media channel and optimal allocations by channel, detailing the impact of OOH using Sales and Brand metric data and included guidelines for allocating media channel spend levels to optimize overall improvements mainly focusing on OOH.
- This study builds on the 2023 analysis and examines the impact of **incremental reallocation of budget** on the path to full optimization of the total media plan, and the resulting optimal levels for OOH. This analysis supports the recommendation to use an incremental approach to adjusting OOH media allocations rather than single dramatic increases to full optimization.

The "Media Plan Optimization Analysis of Incremental Increase in OOH Share" study was sponsored by The Foundation for Out of Home Advertising Research and Education (FOARE), a 501 (c) (3) not for profit, charitable organization.

Media Plan Optimization Analysis Process and Journey

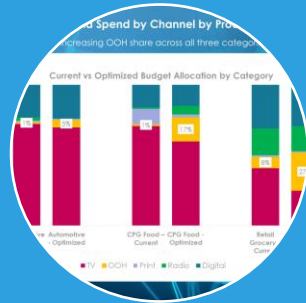
The analysis journey to optimizing media plan through increasing OOH in incremental steps



2023 Study to identify optimal media plan and OOH role within that:

Comprehensive analysis utilizing econometric modelling, to build response curves by channel to identify optimal media plan across 3 categories:

- Automotive
- CPG Food
- Retail Grocery



2023: Optimized media plan identified

Utilizing the comprehensive set of response curves developed by channel, optimized media plans by category were created – these optimized across sales and brand metrics

It was identified that OOH was an underinvested channel, and increasing OOH within the media mix would improve ROAS for sales and brand metrics

	Current OOH %	Awa
Automotive	1%	
Food	1%	
	8%	

2023: OOH is currently a significantly underinvested channel

The response curves suggested that OOH is an underutilized channel and should be increased for optimal media plan

However, OOH spends are currently quite low, so optimal OOH recommendations appear relatively high by comparison

An incremental increase approach is recommended rather a move straight to optimal

	INCREMENTAL STEP	OOH SHARE	
1st	-	1%	
1	+ 1%	2%	+ 52.
	+ 2%	4%	+ 1
	+ 1%	5%	

2024: Incremental steps analysis

Further analysis was conducted in 2024 to evaluate the impact of increasing OOH in 3 incremental steps from current levels to optimal. It was identified that with the first incremental step of increasing OOH, the vast majority of the gains can be achieved across sales and brand metrics

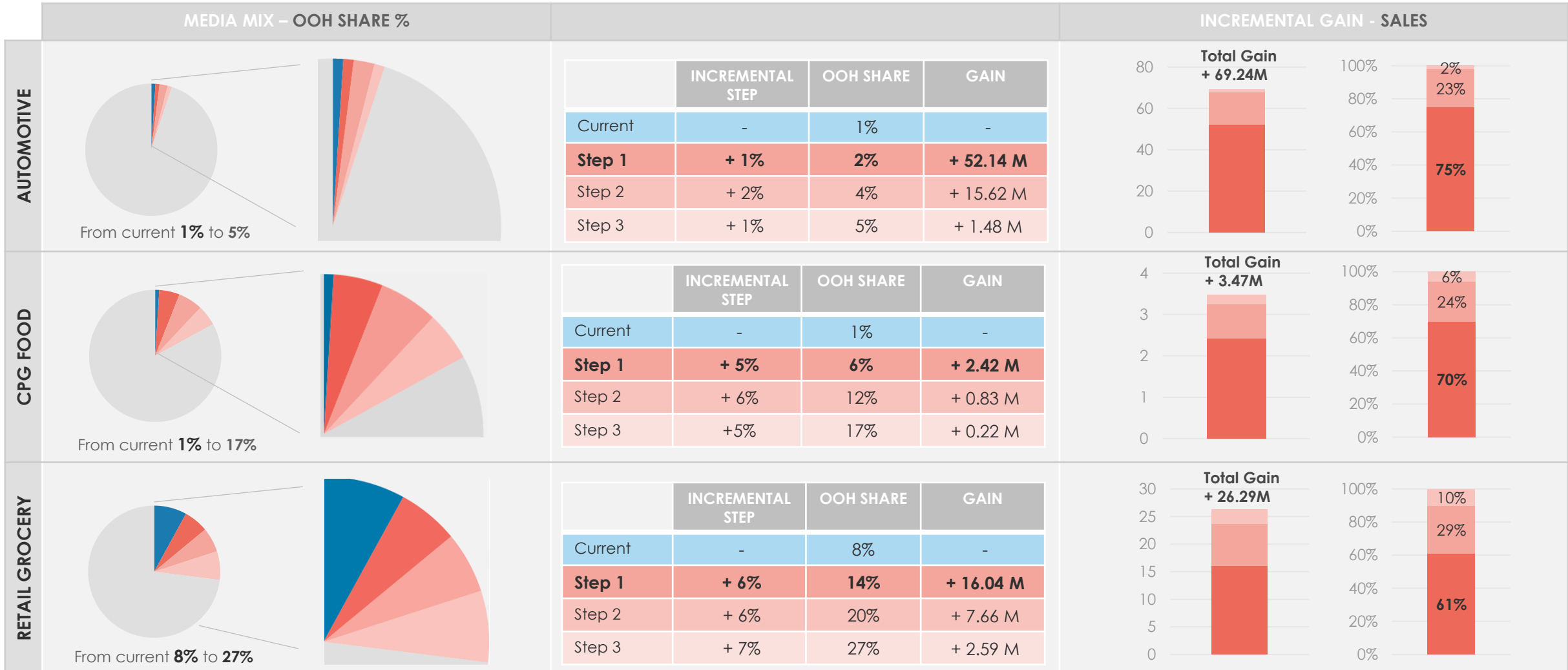
Key Findings

Minor budget reallocations from overspent channels to OOH achieves significant gains for the total media plan

- Optimal budget allocation across **all media channels** demonstrates that **OOH budget** should be **increased** to increase sales revenue and key brand metric scores
- ROAS increases** with increased **allocation to OOH** for sales, as well as for brand awareness, brand consideration and purchase intent scores
- Optimal budget allocation demonstrates that **OOH** has been an **historically significantly under invested** media channel
- The **majority of the gain** in sales and brand metric scores are achieved with the **initial incremental increase of OOH**
- Results provide **confidence** that increasing **OOH** investment only slightly, achieves **significant gains**

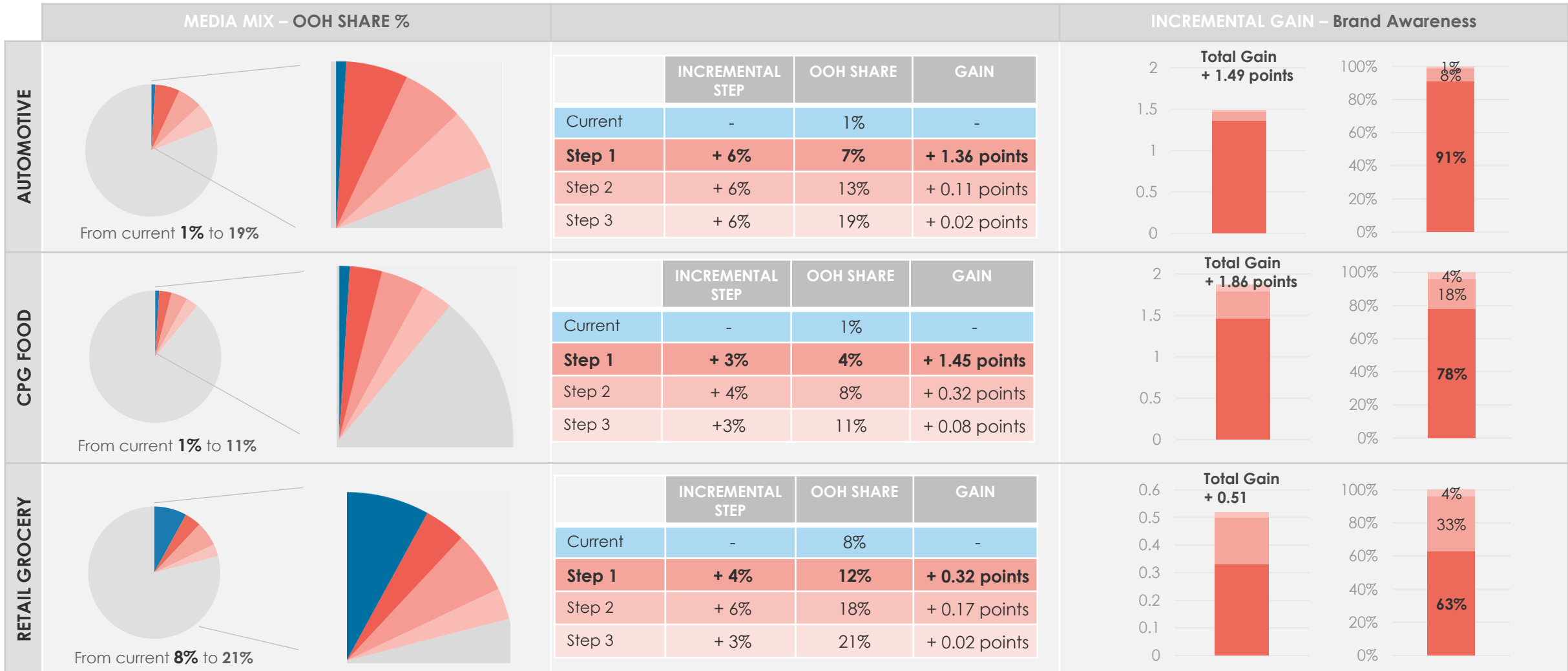
SALES GAIN (ROAS) through Incremental Increase of OOH Share

Majority of gain is achieved in step 1 for all categories



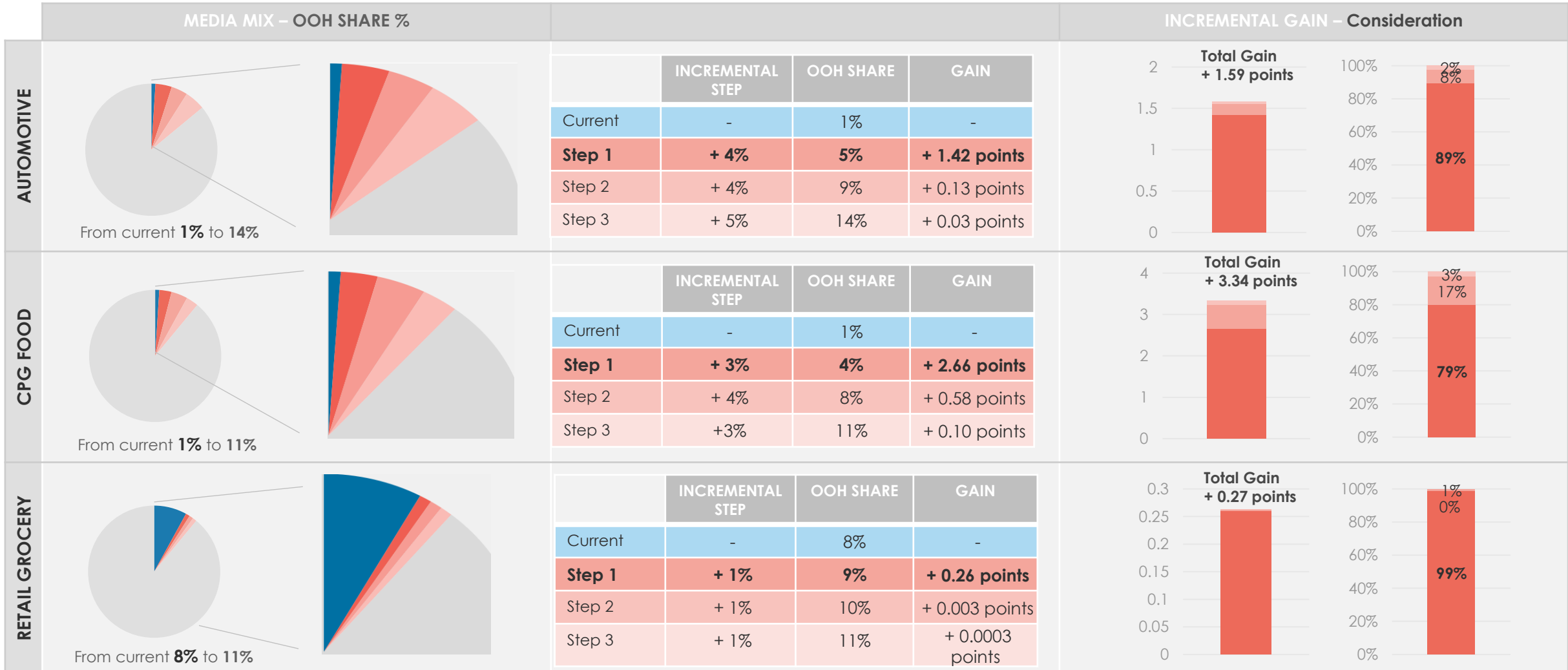
BRAND AWARENESS through Incremental Increase of OOH Share

Majority of gain is achieved in step 1 for all categories



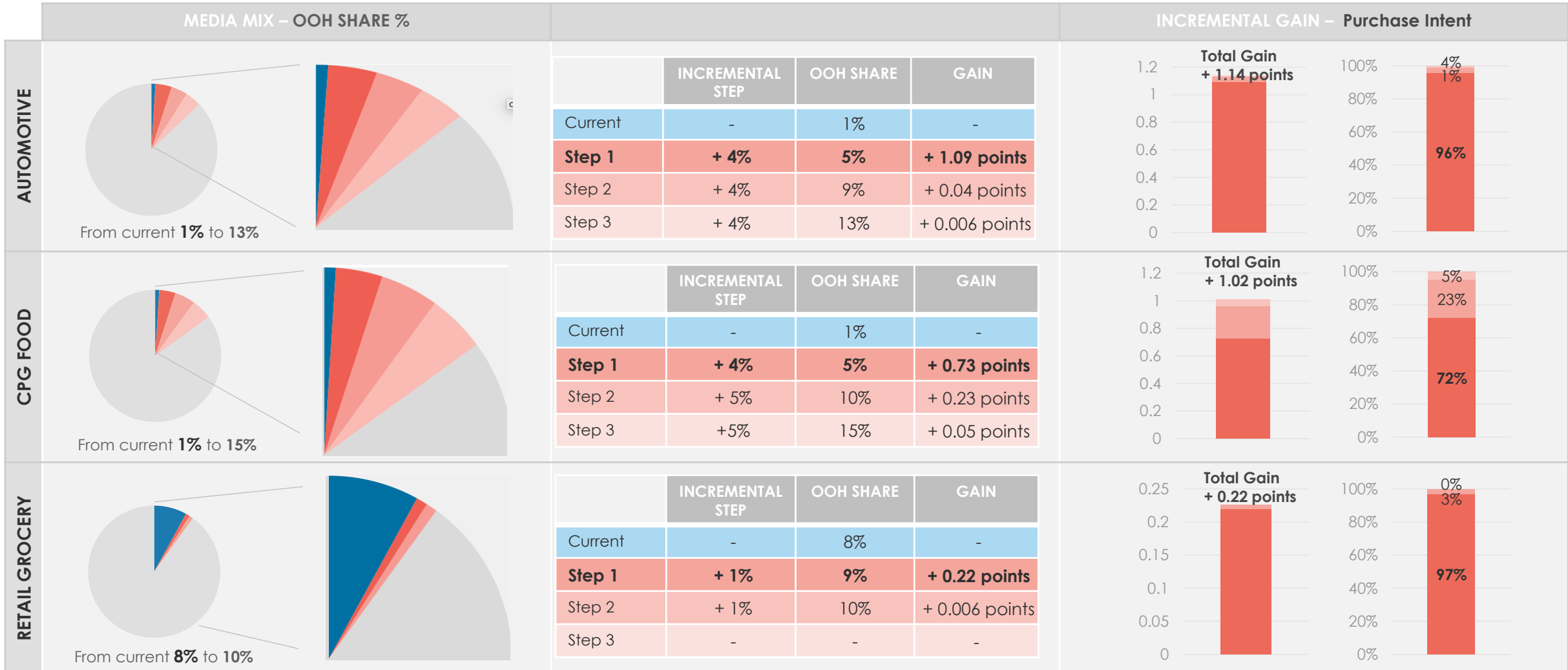
CONSIDERATION through Incremental Increase of OOH Share

Majority of gain is achieved in step 1 for all categories



PURCHASE INTENT through Incremental Increase of OOH Share

Majority of gain is achieved in step 1 for all categories



First Incremental Increase in OOH Achieves the Most Significant Gains

Across sales and key brand metrics - Summary Chart for Step 1

	SALES	BRAND AWARENESS	BRAND CONSIDERATION	BRAND PURCHASE INTENT																																
AUTOMOTIVE	<table border="1"> <tr> <td>OOH Share Current</td> <td>1%</td> </tr> <tr> <td>Incremental Step 1:</td> <td>+1%</td> </tr> <tr> <td>New OOH Share:</td> <td>2%</td> </tr> <tr> <td>GAIN - SALES</td> <td>+ 52.14M</td> </tr> </table>	OOH Share Current	1%	Incremental Step 1:	+1%	New OOH Share:	2%	GAIN - SALES	+ 52.14M	<table border="1"> <tr> <td>OOH Share Current</td> <td>1%</td> </tr> <tr> <td>Incremental Step 1:</td> <td>+6%</td> </tr> <tr> <td>New OOH Share:</td> <td>7%</td> </tr> <tr> <td>GAIN - SALES</td> <td>+ 1.36 points</td> </tr> </table>	OOH Share Current	1%	Incremental Step 1:	+6%	New OOH Share:	7%	GAIN - SALES	+ 1.36 points	<table border="1"> <tr> <td>OOH Share Current</td> <td>1%</td> </tr> <tr> <td>Incremental Step 1:</td> <td>+4%</td> </tr> <tr> <td>New OOH Share:</td> <td>5%</td> </tr> <tr> <td>GAIN - SALES</td> <td>+ 1.42 points</td> </tr> </table>	OOH Share Current	1%	Incremental Step 1:	+4%	New OOH Share:	5%	GAIN - SALES	+ 1.42 points	<table border="1"> <tr> <td>OOH Share Current</td> <td>1%</td> </tr> <tr> <td>Incremental Step 1:</td> <td>+4%</td> </tr> <tr> <td>New OOH Share:</td> <td>5%</td> </tr> <tr> <td>GAIN - SALES</td> <td>+ 1.09 points</td> </tr> </table>	OOH Share Current	1%	Incremental Step 1:	+4%	New OOH Share:	5%	GAIN - SALES	+ 1.09 points
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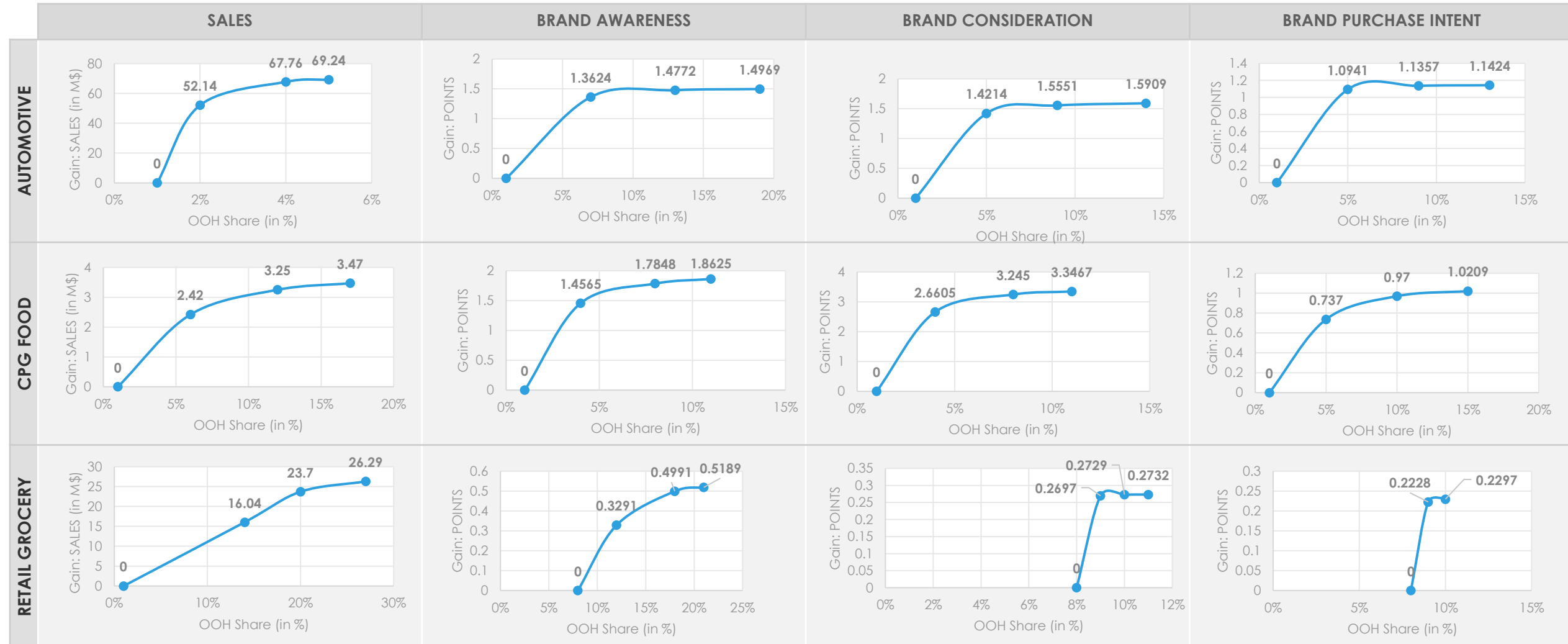
Optimized Media Plan: Summary of Incremental increases in OOH Share

Incremental Steps Summary Chart across all 3 categories and across all 4 KPIs

	SALES				BRAND AWARENESS				BRAND CONSIDERATION				BRAND PURCHASE INTENT							
	Incremental OOH Share	OOH SHARE	GAIN	% of GAIN	Incremental OOH Share	OOH SHARE	GAIN	% of GAIN	Incremental OOH Share	OOH SHARE	GAIN	% of GAIN	Incremental OOH Share	OOH SHARE	GAIN	% of GAIN				
AUTOMOTIVE	Current	-	1%	-	-	Current	-	1%	-	-	Current	-	1%	-	-	-				
	Step 1	+ 1%	2%	+ 52.14 M	75%	Step 1	+ 6%	7%	+ 1.36pts	91%	Step 1	+ 4%	5%	+ 1.42pts	89%	Step 1	+ 4%	5%	+ 1.09pts	96%
	Step 2	+ 2%	4%	+ 15.62 M	23%	Step 2	+ 6%	13%	+0.11pts	8%	Step 2	+ 4%	9%	+ 0.13pts	8%	Step 2	+ 4%	9%	+ 0.04pts	4%
	Step 3	+ 1%	5%	+ 1.48 M	2%	Step 3	+ 6%	19%	+ 0.02pts	1%	Step 3	+ 5%	14%	+ 0.03pts	2%	Step 3	+ 4%	13%	+ 0.006pts	1%
CPG FOOD	Current	-	1%	-	-	Current	-	1%	-	-	Current	-	1%	-	-	Current	-	1%	-	-
	Step 1	+ 5%	6%	+ 2.42 M	70%	Step 1	+ 3%	4%	+ 1.45pts	78%	Step 1	+ 3%	4%	+ 2.66pts	79%	Step 1	+ 5%	5%	+ 0.73pts	72%
	Step 2	+ 6%	12%	+ 0.83 M	24%	Step 2	+ 4%	8%	+ 0.32pts	18%	Step 2	+ 4%	8%	+ 0.58pts	17%	Step 2	+ 5%	10%	+ 0.23pts	23%
	Step 3	+5%	17%	+ 0.22 M	6%	Step 3	+3%	11%	+ 0.08pts	4%	Step 3	+3%	11%	+ 0.10pts	3%	Step 3	+ 5%	15%	+ 0.05pts	5%
RETAIL GROCERY	Current	-	8%	-	-	Current	-	8%	-	-	Current	-	8%	-	-	Current	-	8%	-	-
	Step 1	+ 6%	14%	+ 16.04 M	61%	Step 1	+ 4%	12%	+ 0.32pts	63%	Step 1	+ 1%	9%	+0.26pts	99%	Step 1	+ 1%	9%	+ 0.22pts	97%
	Step 2	+ 6%	20%	+ 7.66 M	29%	Step 2	+ 6%	18%	+ 0.17pts	33%	Step 2	+ 1%	10%	+0.003pts	1%	Step 2	+ 1%	10%	+ 0.006pts	3%
	Step 3	+ 7%	27%	+ 2.59 M	10%	Step 3	+ 3%	21%	+0.02pts	4%	Step 3	+ 1%	11%	+0.0003pts	0%	Step 3	-	-	-	-

Optimized Media Plan: Chart Analysis of Incremental Increases in OOH Share

For all 3 categories and all 4 KPIs, the steepest part of the curve is where the greatest gain is achieved which is the first step for all categories





Incremental Increase to Media Plan Optimization

Sales ROI Analysis Topline

Sales ROI: Incremental Steps Results Summary Table – all three categories

Majority of gain is achieved in step 1 for all categories

Sales ROI	Automotive			CPG Food			Retail Grocery		
	% OOH allocation step increase	Increase in Income \$m	% of total gain in step	% OOH allocation step increase	Increase in Income \$m	% of total gain in step	% OOH allocation step increase	Increase in Income \$m	% of total gain in step
Step 1	OOH 1% to 2%	52.14	75%	OOH 1% to 6%	2.42	70%	OOH 8% to 14%	16.04	61%
Step 2	OOH 2% to 4%	15.62	23%	OOH 6% to 12%	0.83	24%	OOH 14% to 20%	7.66	29%
Step 3	OOH 4% to 5%	1.48	2%	OOH 12% to 17%	0.22	6%	OOH 20% to 27%	2.59	10%
Total - Optimal	OOH 1% to 5%	69.24	100%	OOH 1% to 17%	3.47	100%	OOH 8% to 27%	26.29	100%



Incremental Increase to Media Plan Optimization

Brand Metric Analysis Toplines

Brand Awareness: Incremental Steps Results Summary Table – all three categories

Majority of gain is achieved in step 1 for all categories

Brand Awareness	Automotive			CPG Food			Retail Grocery		
	% OOH allocation step increase	Increase in Brand Metric	% of total gain in step	% OOH allocation step increase	Increase in Brand Metric	% of total gain in step	% OOH allocation step increase	Increase in Brand Metric	% of total gain in step
Step 1	OOH 1% to 7%	1.3624	91%	OOH 1% to 4%	1.4565	78%	OOH 8% to 12%	0.32910	63%
Step 2	OOH 7% to 13%	0.1148	8%	OOH 4% to 8%	0.3283	18%	OOH 12% to 18%	0.17000	33%
Step 3	OOH 13% to 19%	0.0197	1%	OOH 8% to 11%	0.0777	4%	OOH 18% to 21%	0.01980	4%
Total - Optimal	OOH 1% to 19%	1.4969	100%	OOH 1% to 11%	1.8625	100%	OOH 8 to 21%	0.51890	100%

Brand Consideration: Incremental Steps Results Summary Table – all three categories

Majority of gain is achieved in step 1 for all categories

Consideration	Automotive			CPG Food			Retail Grocery		
	% OOH allocation step increase	Increase in Brand Metric	% of total gain in step	% OOH allocation step increase	Increase in Brand Metric	% of total gain in step	% OOH allocation step increase	Increase in Brand Metric	% of total gain in step
Step 1	OOH 1% to 5%	1.4214	89%	OOH 1% to 4%	2.6605	79%	OOH 8% to 9%	0.2697	99%
Step 2	OOH 5% to 9%	0.1337	8%	OOH 4% to 8%	0.5845	17%	OOH 9% to 10%	0.0032	1%
Step 3	OOH 9% to 14%	0.0358	2%	OOH 8% to 11%	0.1017	3%	OOH 10% to 11%	0.0003	0%
Total - Optimal	OOH 1% to 14%	1.5909	100%	OOH 1% to 11%	3.3467	100%	OOH 8% to 11%	0.2732	100%

Purchase Intent: Incremental Steps Results Summary Table – all three categories

Majority of gain is made in step 1 for all categories

Purchase Intent	Automotive			CPG Food			Retail Grocery		
	% OOH allocation step increase	Increase in Brand Metric	% of total gain in step	% OOH allocation step increase	Increase in Brand Metric	% of total gain in step	% OOH allocation step increase	Increase in Brand Metric	% of total gain in step
Step 1	OOH 1% to 5%	1.0941	96%	OOH 1% to 5%	0.7370	72%	OOH 8% to 9%	0.2228	97%
Step 2	OOH 5% to 9%	0.0416	4%	OOH 5% to 10%	0.2331	23%	OOH 9% to 10%	0.0069	3%
Step 3	OOH 9% to 13%	0.0067	1%	OOH 10% to 15%	0.0509	5%			
Total - Optimal	OOH 1% to 13%	1.1424	100%	OOH 1% to 15%	1.021	100%	OOH 8% to 10%	0.2297	100%



Summary Charts Sales & Brand Metrics

Sales - Summary

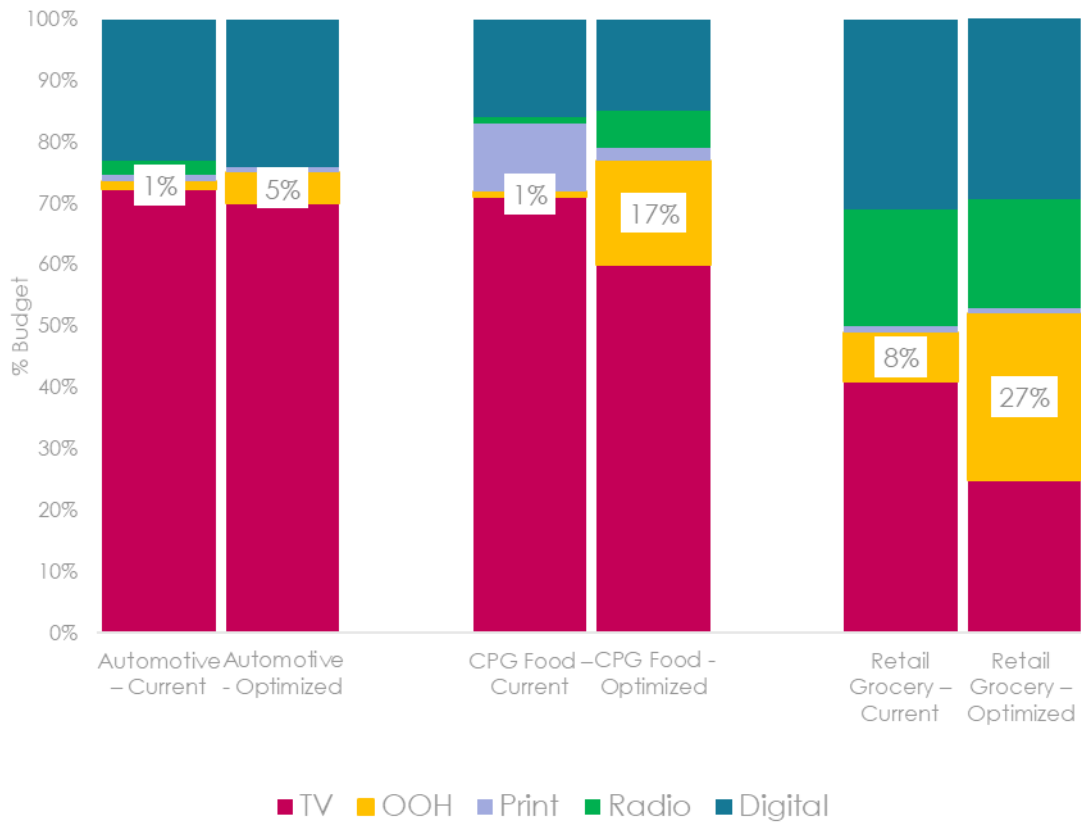


Brand Awareness by Category: Current vs Optimal Media Allocation and ROAS improvement

OOH is increased in all categories to achieve Optimization

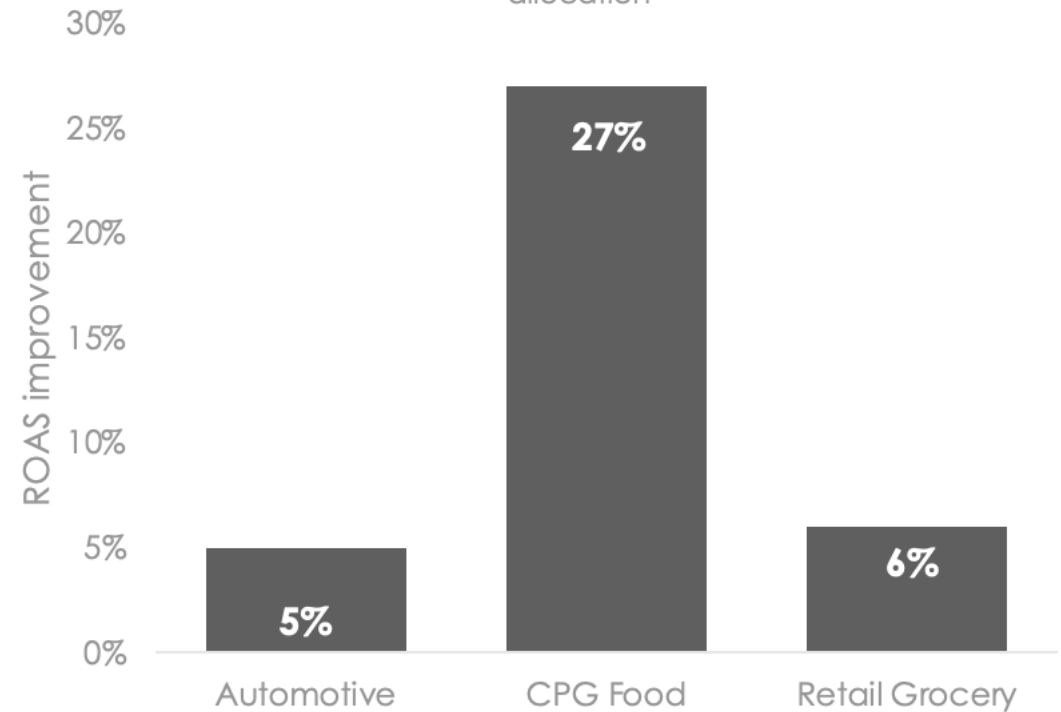
Optimized budget allocations recommends an increase in OOH in all three categories

Sales: Current vs Optimized Budget Allocation by Category



ROAS improves across all categories with an increase in allocation to OOH for optimal budget

Percentage improvement in ROAS with optimal budget allocation



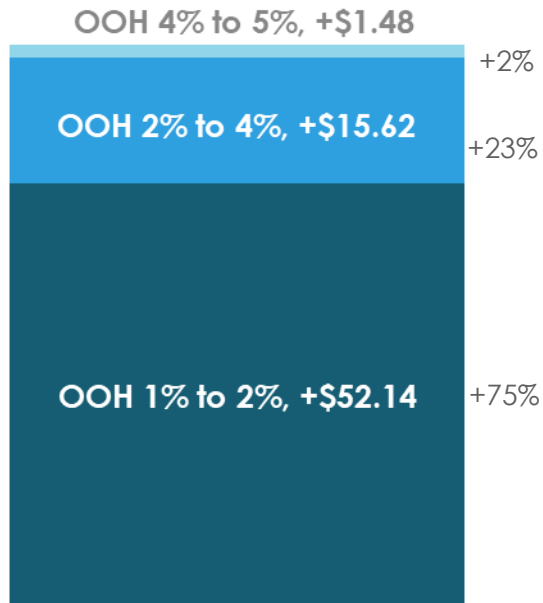
Impact of 3 incremental OOH increases – on incremental income generated by category

The initial incremental increase in OOH allocation generates the largest gain across all three categories



Automotive

Increase in income \$m with incremental increases in OOH for optimal allocation



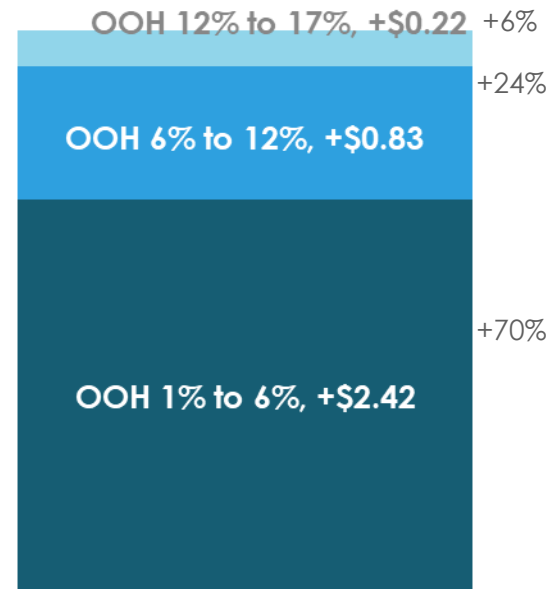
Full Optimization is 1% to 5%: Total gain **\$69.2m**

75% gain is achieved in the **first incremental step**



CPG Food

Increase in income \$m with incremental increases in OOH for optimal allocation



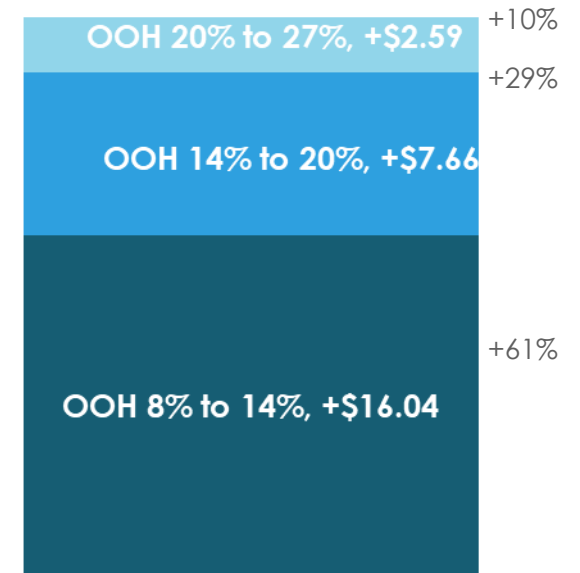
Full Optimization is 1% to 17%: Total gain **\$3.5m**

70% gain is achieved in the **first incremental step**



Retail Grocery

Increase in income \$m with incremental increases in OOH for optimal allocation



Full Optimization is 8% to 27%: Total gain **\$26.3m**

61% gain is achieved in the **first incremental step**

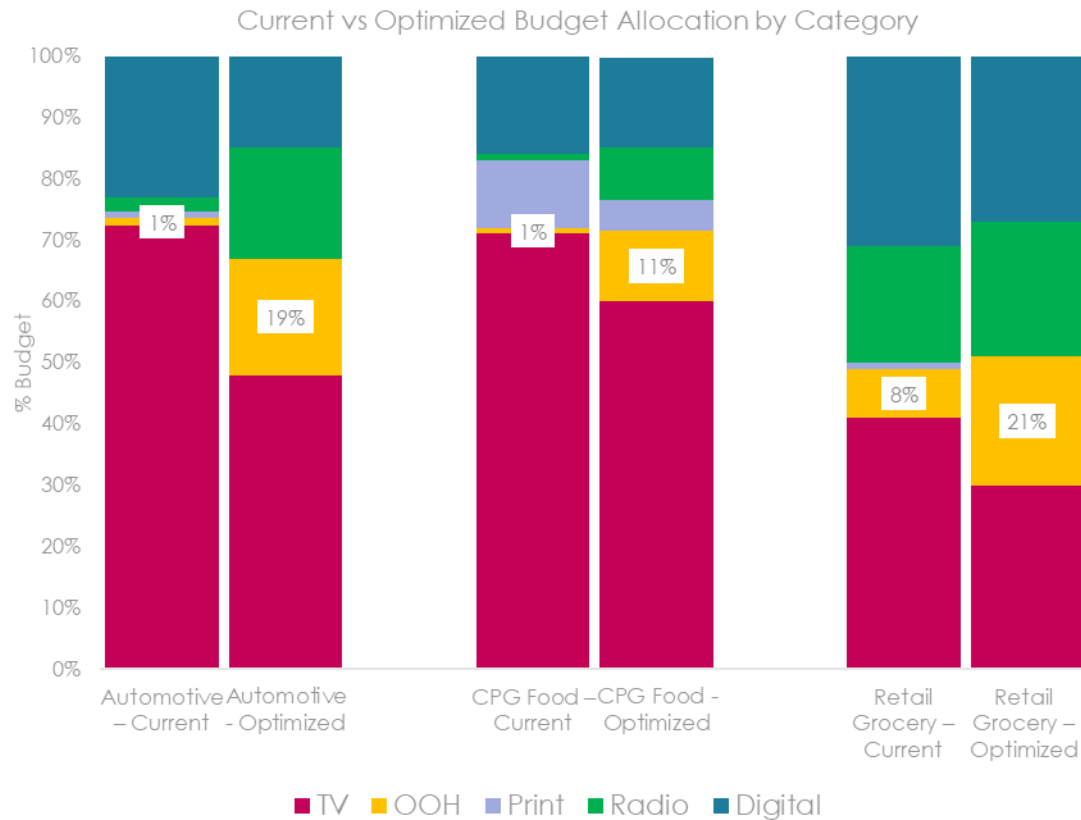
Brand Awareness - Summary



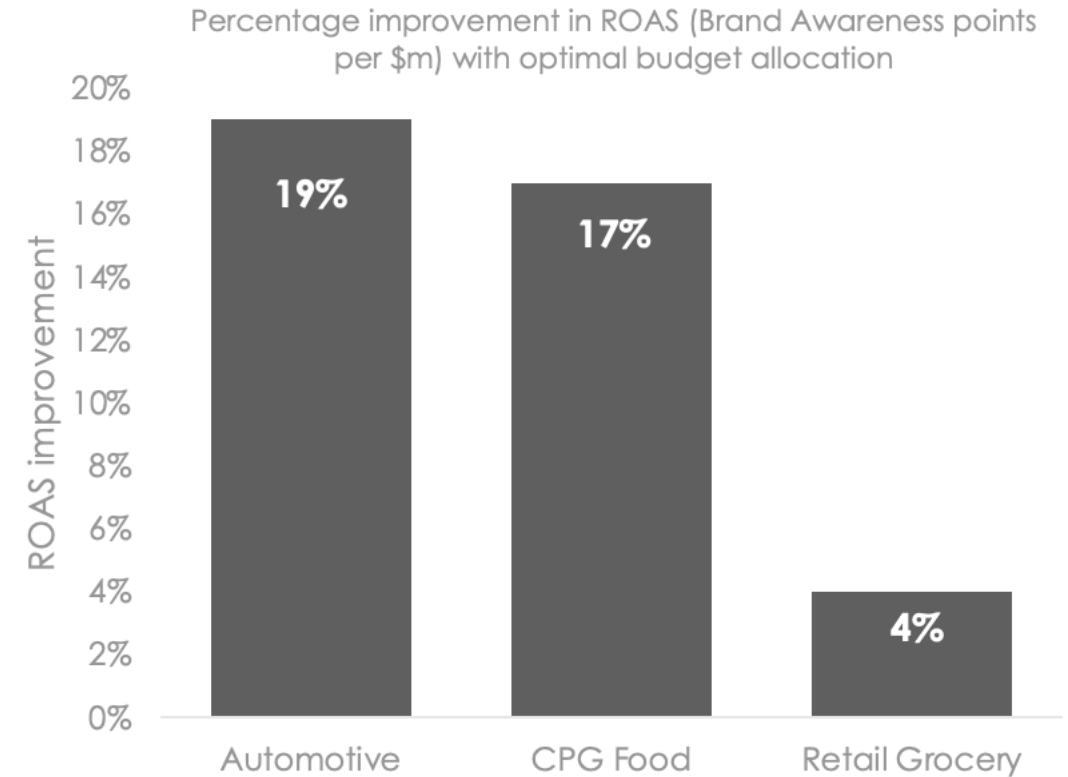
Brand Awareness by Category: Current vs Optimal Media Allocation and ROAS improvement

OOH is increased in all categories to achieve optimization

Optimized budget allocations recommends an increase in OOH in all three categories



ROAS improves across all categories with an increase in allocation to OOH for optimal budget



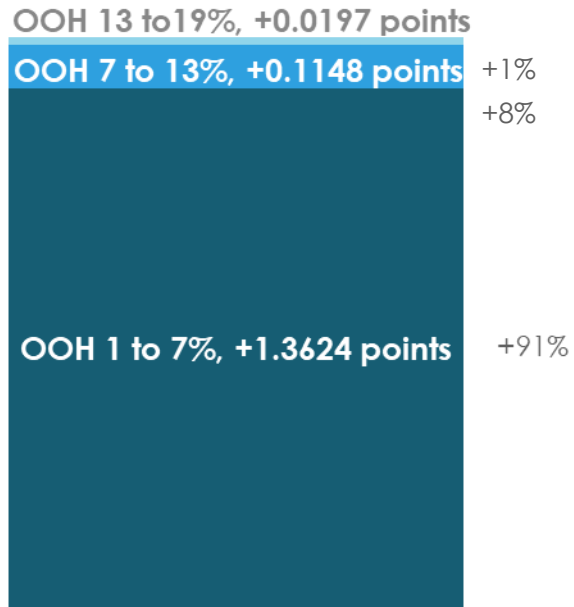
Brand Awareness: impact of 3 incremental increases across 3 categories

The initial incremental increase in OOH allocation generates the largest gain across three categories



Automotive

Increase in Brand Awareness with incremental increases in OOH for optimal allocation



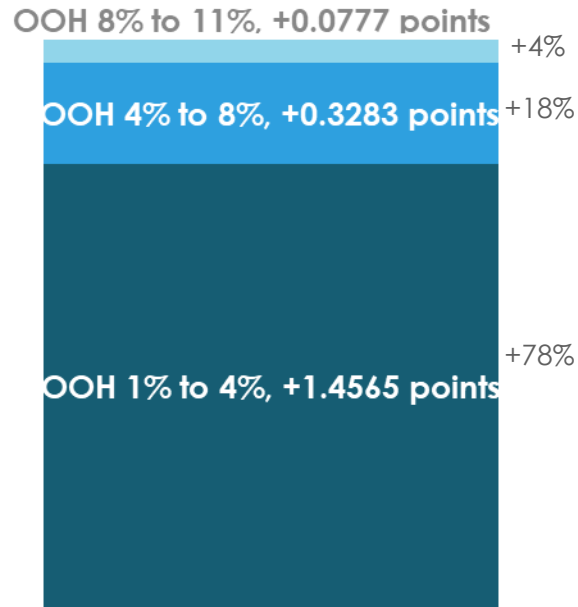
Full Optimization is 1% to 19%: Total gain **1.50 points**

91% gain is achieved in the **first incremental step**



CPG Food

Increase in Brand Awareness with incremental increases in OOH for optimal allocation



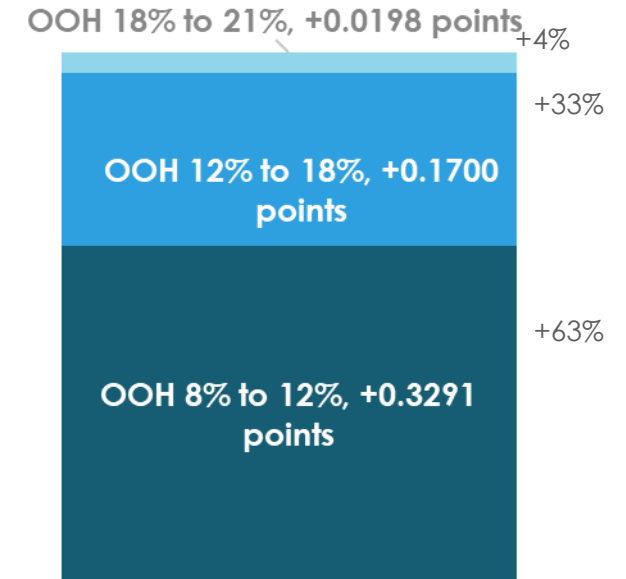
Full Optimization is 1% to 11%: Total gain **1.86 points**

78% gain is achieved in the **first incremental step**



Retail Grocery

Increase in Brand Awareness with incremental increases in OOH for optimal allocation



Full Optimization is 8% to 21%: Total gain **0.52 points**

63% gain is achieved in the **first incremental step**

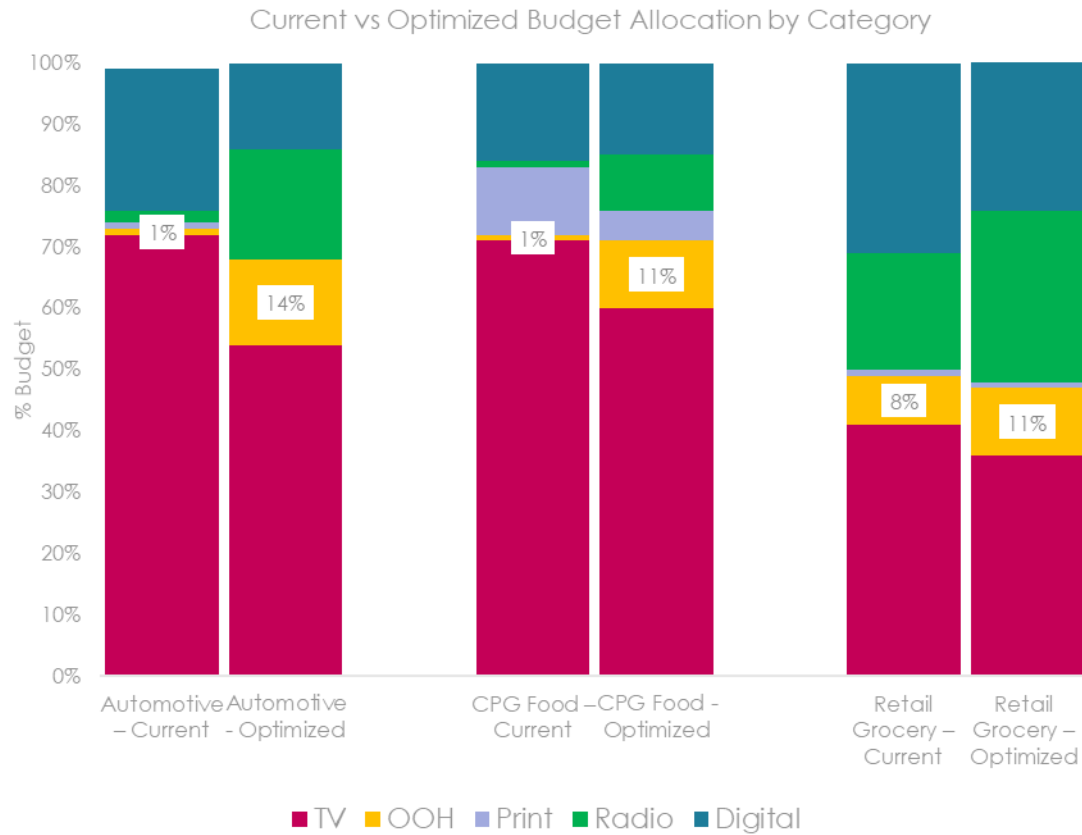
Consideration - Summary



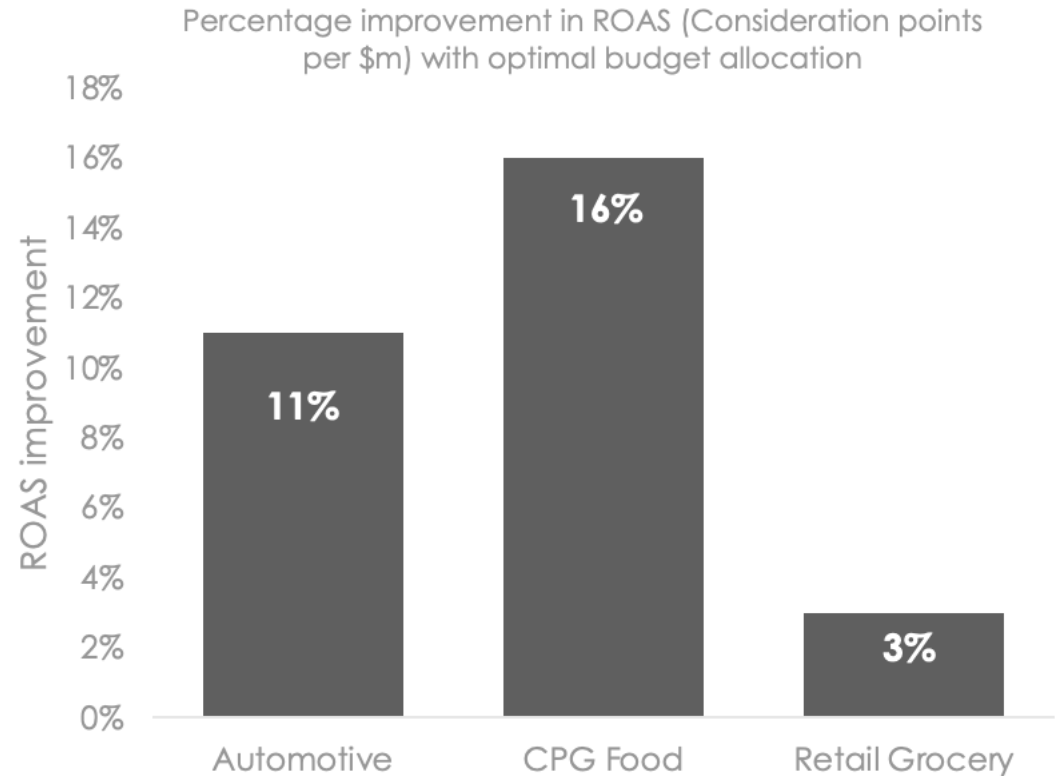
Brand Consideration by Category: Current vs Optimal Media Allocation and ROAS improvement

OOH is increased in all categories to achieve optimization

Optimized budget allocations recommends an increase in OOH in all three categories



ROAS improves across all categories with an increase in allocation to OOH for optimal budget



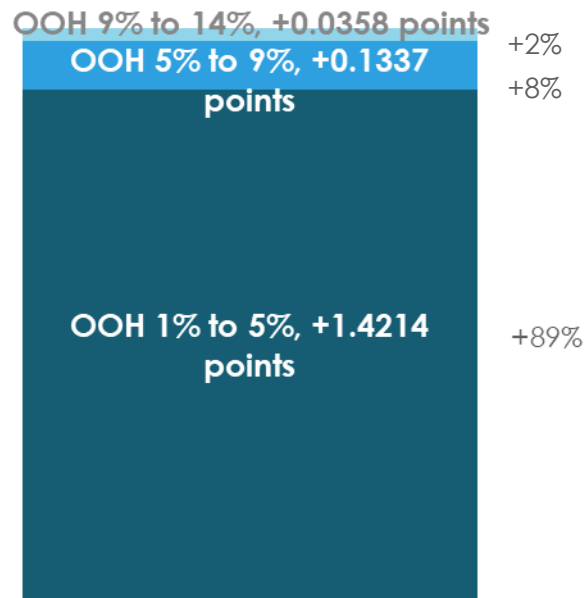
Brand Consideration: impact of 3 incremental increases across 3 categories

The initial incremental increase in OOH allocation generates the largest gain across three categories



Automotive

Increase in Brand Consideration with incremental increases in OOH for optimal allocation



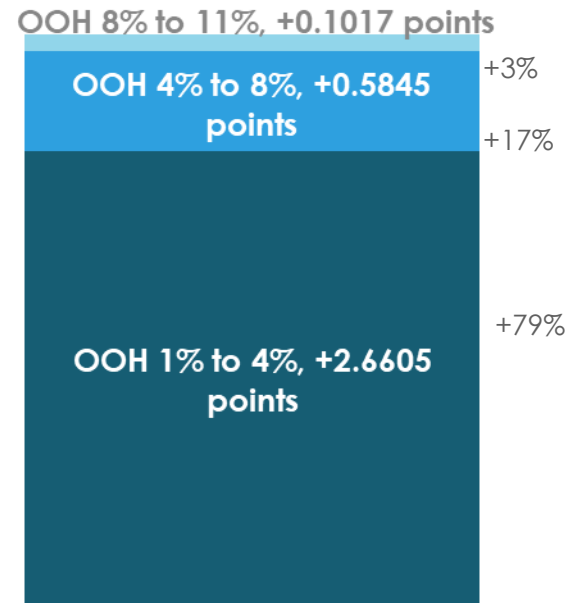
Full Optimization is 1% to 14%: Total gain **1.59 points**

89% gain is achieved in the **first incremental step**



CPG Food

Increase in Brand Consideration with incremental increases in OOH for optimal allocation



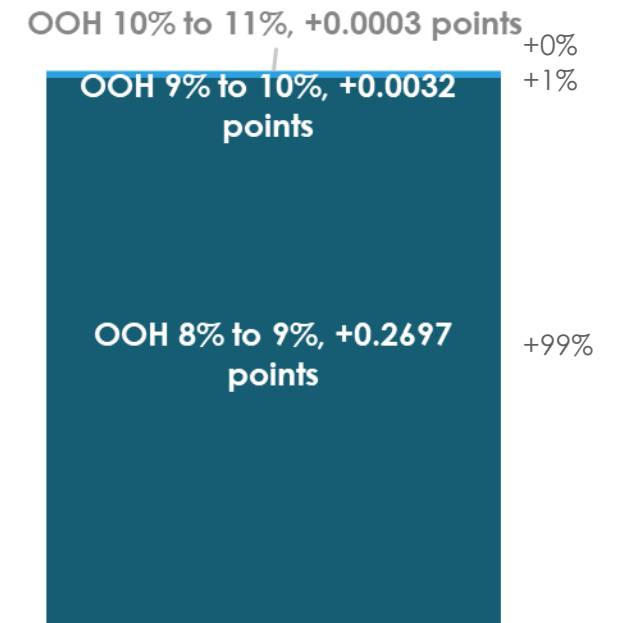
Full Optimization is 1% to 11%: Total gain **3.35 points**

79% gain is achieved in the **first incremental step**



Retail Grocery

Increase in Brand Consideration with incremental increases in OOH for optimal allocation



Full Optimization is 8% to 11%: Total gain **0.27 points**

99% gain is achieved in the **first incremental step**

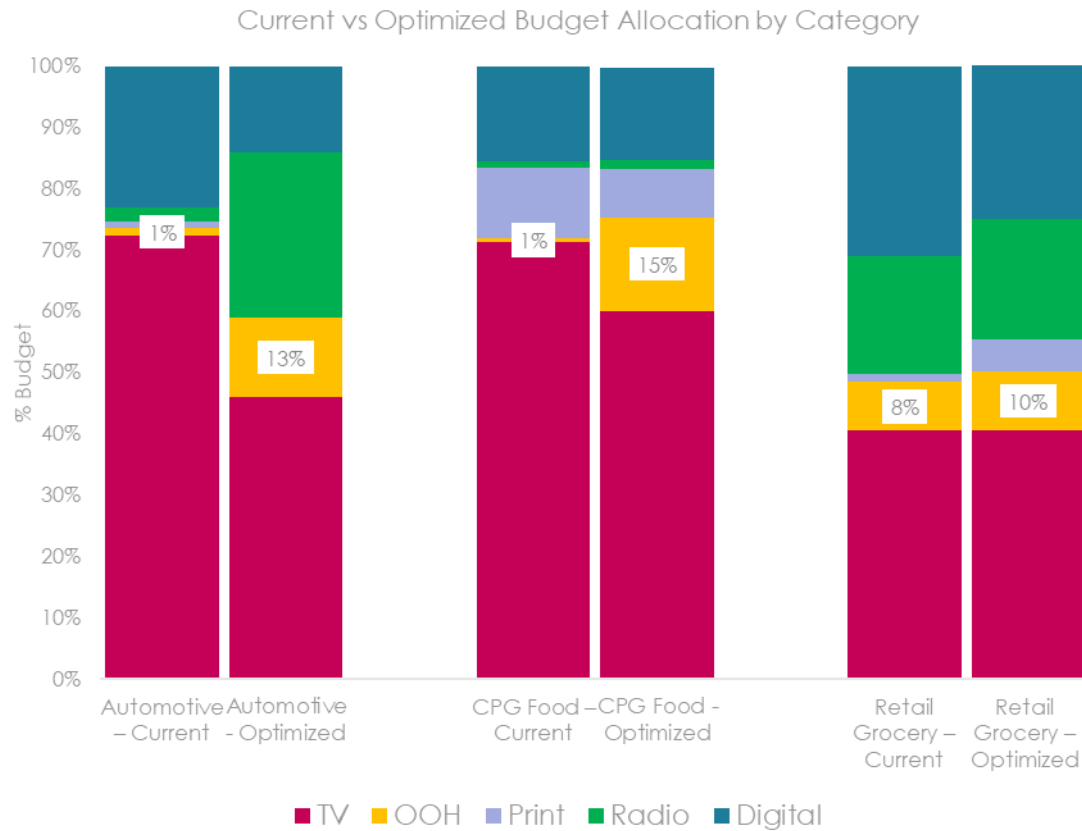
Purchase Intent - Summary



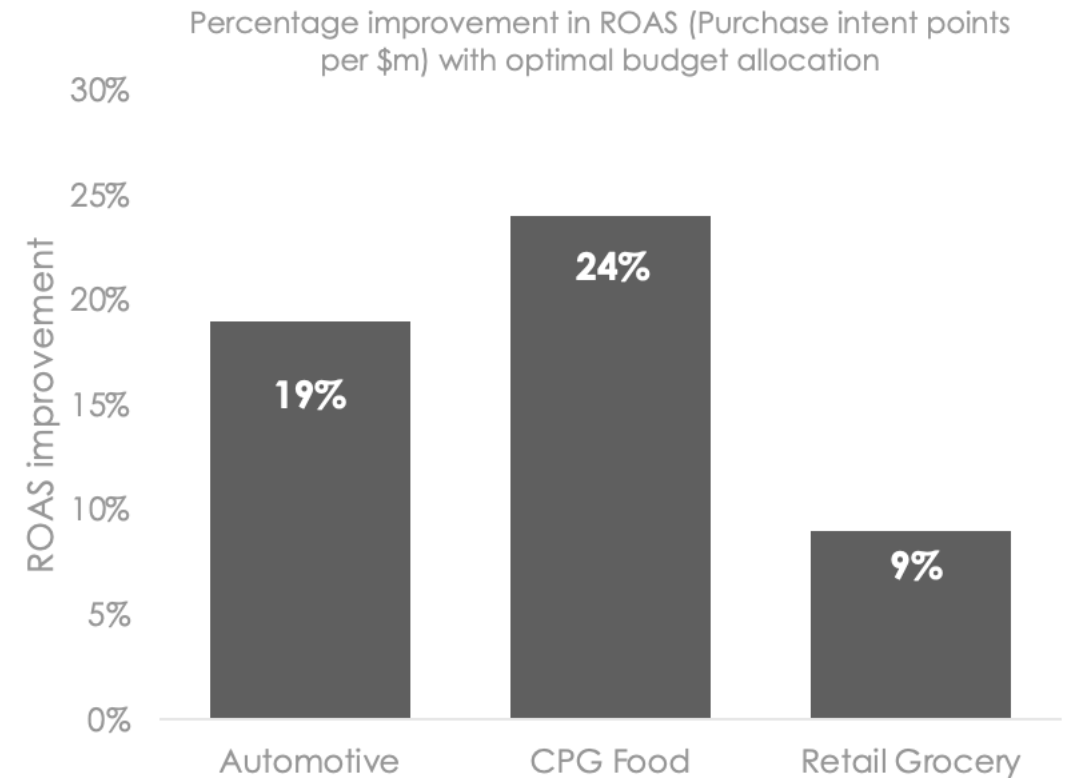
Purchase Intent by Category: Current vs Optimal Media Allocation and ROAS improvement

OOH is increased in all categories to achieve optimization

Optimized budget allocations recommends an increase in OOH in all three categories



ROAS improves across all categories with an increase in allocation to OOH for optimal budget



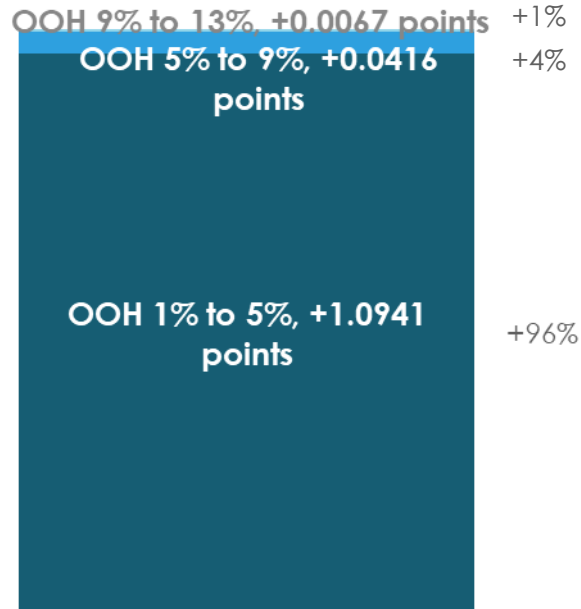
Purchase Intent: impact of 3 incremental increases across 3 categories

The initial incremental increase in OOH allocation generates the largest gain across three categories



Automotive

Increase in Purchase Intent with incremental increases in OOH for optimal allocation



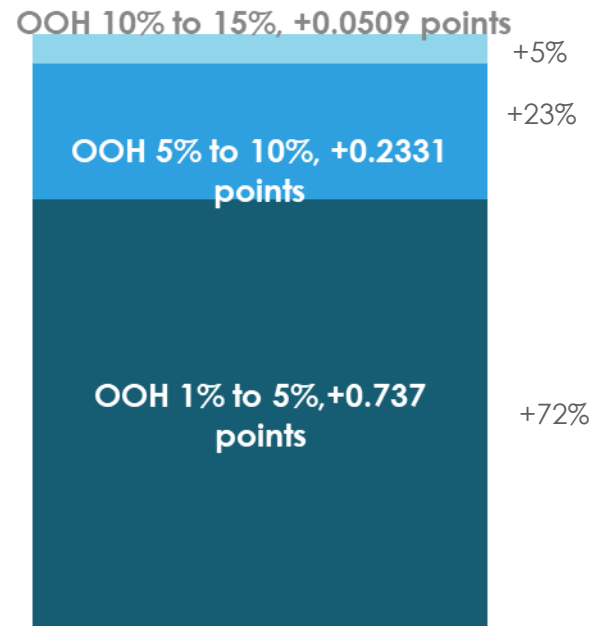
Full Optimization is 1% to 13%: Total gain **1.14 points**

96% gain is achieved in the **first incremental step**



CPG Food

Increase in Purchase Intent with incremental increases in OOH for optimal allocation



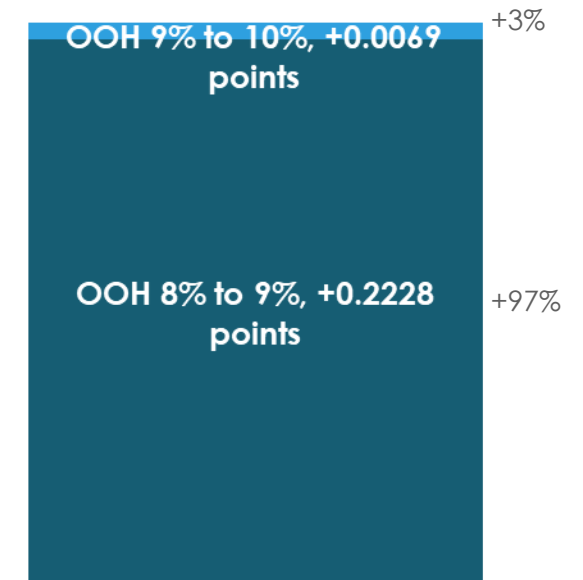
Full Optimization is 1% to 15%: Total gain **1.02 points**

72% gain is achieved in the **first incremental step**



Retail Grocery

Increase in Purchase Intent with incremental increases in OOH for optimal allocation



Full Optimization is 8% to 10%: Total gain **0.22 points**

97% gain is achieved in the **first incremental step**



Appendix

Total Optimization Analysis

2022 Average Spend for All Categories by Channel

Automotive category has the highest spend

Channel	Automotive Average Annual Spend per brand 2022 \$m	CPG Food Average Annual Spend per brand 2022 \$m	Retail Grocery Average Annual Spend per brand 2022 \$m
TV	153.58	20.07	8.54
OOH	2.57	0.17	1.65
Print	2.32	3.20	0.30
Radio	4.63	0.29	4.03
Digital	49.04	4.39	6.51
TOTAL	212.14	28.12	21.03

Optimizing Sales ROAS:- OOH spend ranges current vs optimized

By category, for Small vs Medium vs Large Brands

Current OOH spend range:

OOH Spend Range current \$m	Small	Medium	Large	Spend range current
Automotive	1.00	0.58	6.53	\$0.58m to \$6.53m
CPG Food	0.06	0.02	0.42	\$0.02m to \$0.42m
Retail Grocery	0.31	0.61	4.04	\$0.31m to \$4.04m

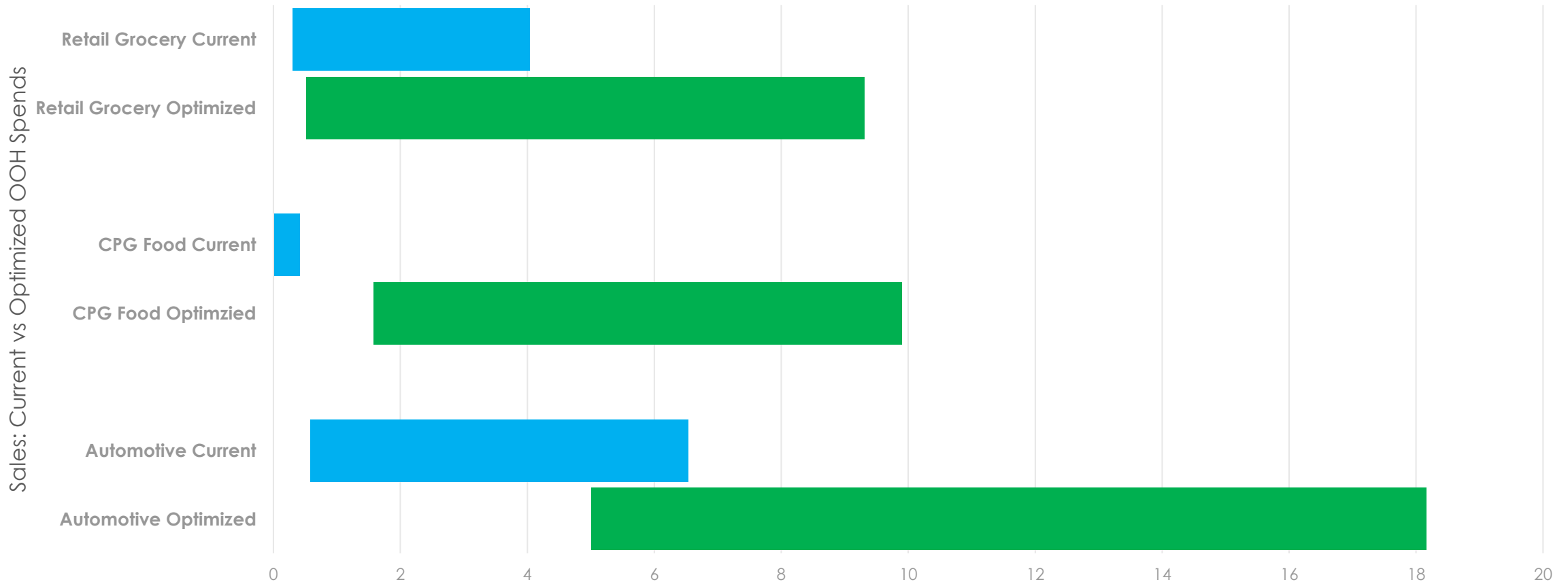
Optimized OOH spend range:

OOH Spend Range optimized \$m	Small	Medium	Large	Spend range optimized
Automotive	5.01	10.08	18.16	\$5.01m to \$18.16m
CPG Food	1.58	3.85	9.90	\$1.58m to \$9.90m
Retail Grocery	0.52	3.27	9.31	\$0.52m to \$9.31m

Optimizing Sales ROAS: OOH spend ranges current vs optimized

By category, across small, medium and large brands

Sales: Current vs Optimized OOH Spends (Range of Spend - Small, Medium, Large Brands)



Note: spend ranges based on average 2022 Vivvix brand spend

Optimizing Brand Awareness ROAS: OOH spend ranges current vs optimized

By category, for Small vs Medium vs Large Brands

Current OOH spend range:

OOH Spend Range current \$m	Small	Medium	Large	Spend range current
Automotive	1.00	0.58	6.53	\$0.58m to \$6.53m
CPG Food	0.06	0.02	0.42	\$0.02m to \$0.42m
Retail Grocery	0.31	0.61	4.04	\$0.31m to \$4.04m

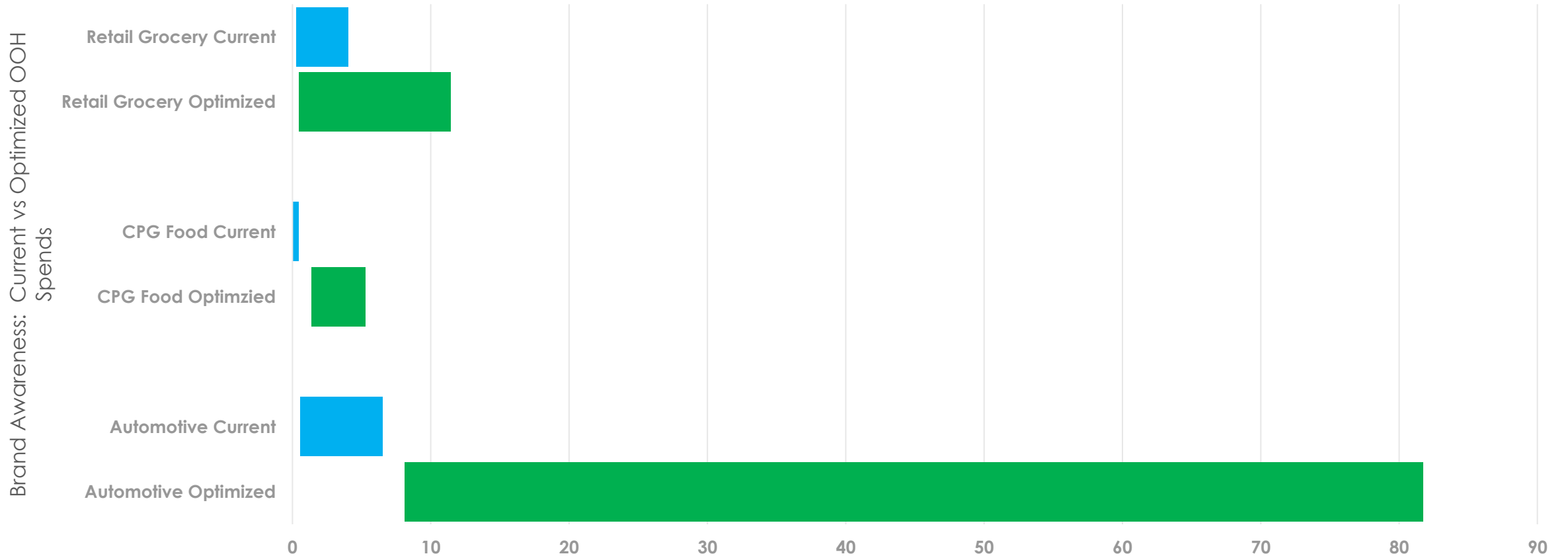
Optimized OOH spend range:

OOH Spend Range optimized \$m	Small	Medium	Large	Spend range optimized
Automotive	8.10	31.92	81.72	\$8.10m to \$81.72m
CPG Food	1.40	2.57	5.29	\$1.40m to \$5.29m
Retail Grocery	0.46	2.29	11.44	\$0.46m to \$11.44m

Optimizing Brand Awareness ROAS: OOH spend ranges current vs optimized

By category, across small, medium and large brands

Brand Awareness: Current vs Optimized OOH Spends (Range of Spend - Small, Medium, Large Brands)



Note: spend ranges based on average 2022 Vivvix brand spend

Optimizing Consideration ROAS: OOH spend ranges current vs optimized

By category, for Small vs Medium vs Large Brands

Current OOH spend range:

OOH Spend Range current \$m	Small	Medium	Large	Spend range current
Automotive	1.00	0.58	6.53	\$0.58m to \$6.53m
CPG Food	0.06	0.02	0.42	\$0.02m to \$0.42m
Retail Grocery	0.31	0.61	4.04	\$0.31m to \$4.04m

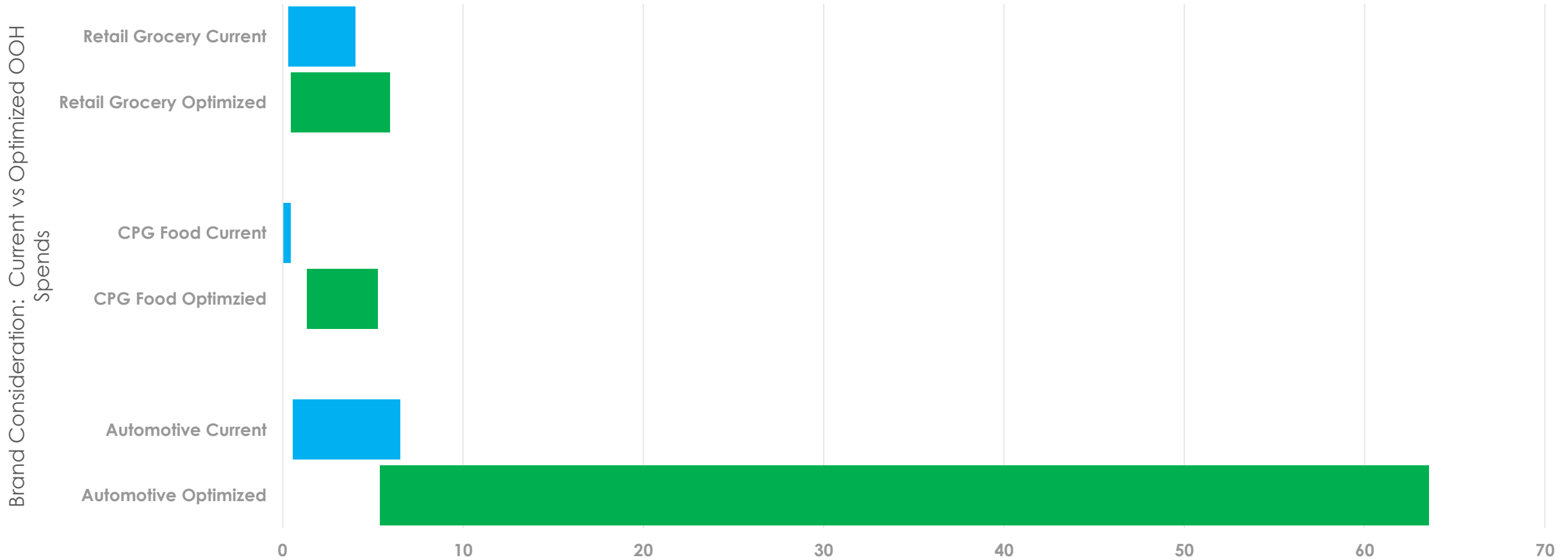
Optimized OOH spend range:

OOH Spend Range optimized \$m	Small	Medium	Large	Spend range optimized
Automotive	5.40	23.52	63.56	\$5.40m to \$63.56m
CPG Food	1.35	2.51	5.29	\$1.35m to \$5.29m
Retail Grocery	0.46	0.91	5.96	\$0.46m to \$5.96m

Optimizing Consideration ROAS: OOH spend ranges current vs optimized

By category, across small, medium and large brands

Brand Consideration: Current vs Optimized OOH Spends (Range of Spend - Small, Medium, Large Brands)



Note: spend ranges based on average 2022 Vivvix brand spend

Optimizing Purchase Intent ROAS: OOH spend ranges current vs optimized

By category, for Small vs Medium vs Large Brands

Current OOH spend range:

OOH Spend Range current \$m	Small	Medium	Large	Spend range current
Automotive	1.00	0.58	6.53	\$0.58m to \$6.53m
CPG Food	0.06	0.02	0.42	\$0.02m to \$0.42m
Retail Grocery	0.31	0.61	4.04	\$0.31m to \$4.04m

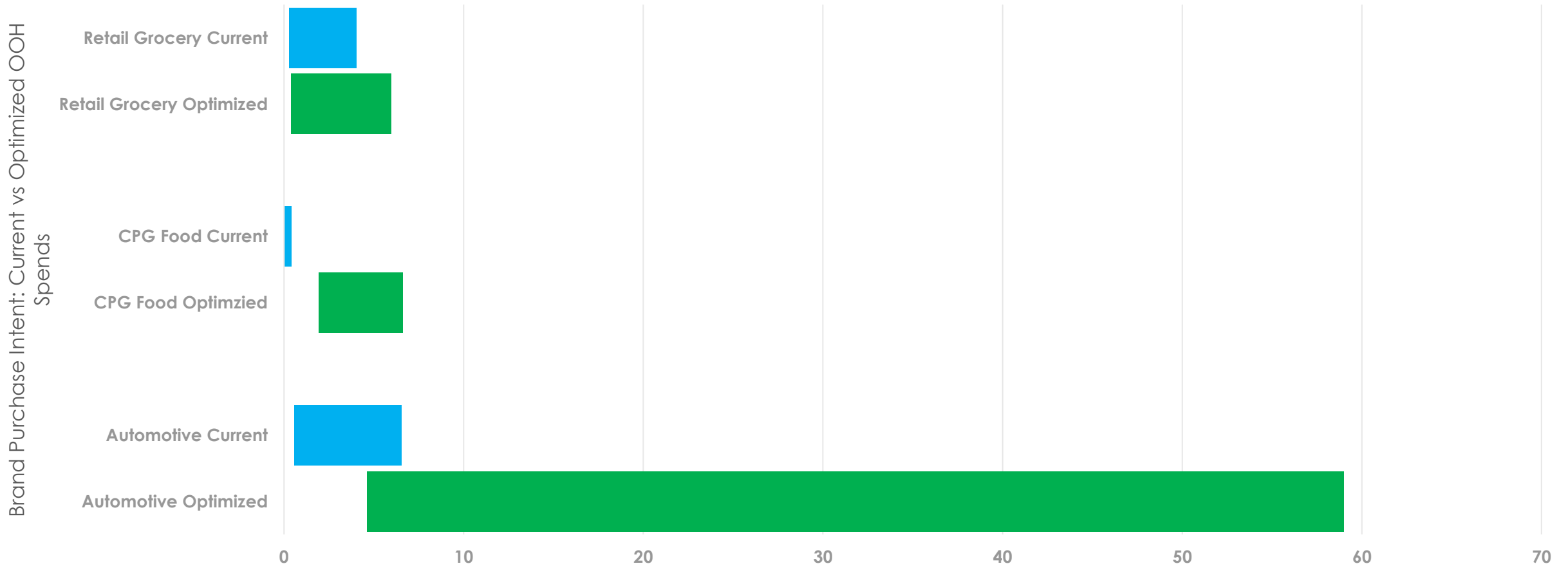
Optimized OOH spend range:

OOH Spend Range optimized \$m	Small	Medium	Large	Spend range optimized
Automotive	4.63	21.84	59.02	\$4.63m to \$59.02m
CPG Food	1.92	3.53	6.61	\$1.92m to \$6.61m
Retail Grocery	0.39	1.27	5.96	\$0.39m to \$5.96m

Optimizing Purchase Intent ROAS: OOH spend ranges current vs optimized

By category, across small, medium and large brands

Brand Purchase Intent: Current vs Optimized OOH spends (Range of Spend - Small, Medium, Large Brands)



Note: spend ranges based on average 2022 Vivvix brand spend