



INDUSTRY REPORT:

# THE STATE OF LOCALIZED PROGRAMMATIC

March 2019

Simpli.fi

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# Industry Report: The State of Localized Programmatic

## Introduction

Localized advertising, once overlooked by national advertisers, is now a valuable part of any marketer's strategy. While historically advertisers focused most of their spend on national campaigns, today however there is a growing need to make advertising more personal... more localized. Advertisers at-large are evaluating how they most effectively identify and reach customers in the cities and locations where they live and play and as a result, they are adjusting their marketing spend.

The numbers tell the story. BIA/Kelsey forecasts that national brands will spend \$62.7 billion to reach local consumers this year. That's a \$600 million increase compared to what national brands spent locally in 2018. Plus multi-location brands are spending 25% of their budgets on location-based marketing and more than 50% are using location data to target customers, representing billions of dollars, according to a survey of 500 marketers by the Local Search Association. Advertisers are getting more comfortable with adding location data into their marketing mix and we expect the growth numbers to continue the upward trajectory.

Since Simpli.fi's founding in 2010, our programmatic targeting capabilities have transformed all aspects of localized marketing. Scaling large numbers of highly personalized and targeted local campaigns requires purpose-built technology. The Simpli.fi platform was built to give marketers the ability to extract more value from audience and campaign data than any traditional segment-based platform by utilizing our proprietary unstructured data network. In doing so, Simpli.fi has allowed for programmatic advertising tools and technology, previously only used for large national buys, to be accessible for advertisers of all sizes who want to effectively scale localized audiences, messages, and budgets in real-time and across channels.

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**In its inaugural report, Simpli.fi, the original pioneer of localized programmatic, aims to unpack the factors influencing this shift toward localization, including a look at the current state of localized programmatic, key drivers of growth, and reasons for advertisers to consider localizing their strategy.**

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## The Shift to Localization

It's important to understand the market forces at play and why advertisers are placing a greater focus on localization. These factors include the growth of mobile and advancements in location data intelligence and insights.

### Growth of Mobile

It all started with the now pervasive smartphone. These personal devices forever redefined how people find information and purchase goods and services and in turn,



provided another avenue for advertisers to reach consumers. Even back in 2016, Cisco reported that the number of global mobile users was growing twice as fast as the global population. In 2018, programmatic mobile ad spend in the U.S. grew 25%, from \$24 billion the year prior. Mobile will soon account for around 78% of the \$46 billion programmatic ad market, according to eMarketer.

At Simpli.fi, we're also obsessed with mobile – our Data Network covers 90% of all smartphone users. We reach over 1.3 billion devices and serve ads on over 600,000+ apps. We see a staggering three billion records per hour and 500 million unique locations per day. Our data scientists are committed to ensuring we use only the highest quality location data. Even after rigorous scrubbing, cleaning, and filtering of the data, Simpli.fi sees approximately 600 times the amount of location data signals when compared to other in-market solutions. This passion for quality and quantity is mandatory for success in mobile marketing today.

## MOBILE INSIGHTS

Consumers spend on average **69%** of their media time on smartphones.  
(Comscore)

People now spend more than **5 HRS** a day on mobile devices.  
(MediaPost)

**47%** of U.S. smartphone owners say their smartphone is something they could not live without. (Pew Research)

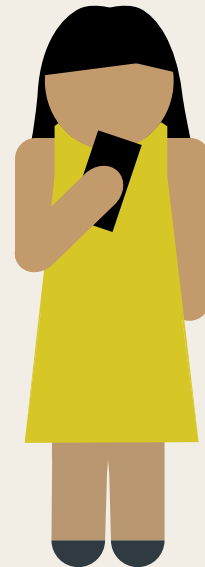
**57%** of all U.S. online traffic now comes from smartphones and tablets.  
(BrightEdge)

People check their phones an average of **85 times** a day.  
(PLOS Research)

**60%** of purchase-influencing ads are viewed on a mobile device. (IAB)

**90%** of today's mobile internet engagement involves mobile apps, while the other 10% is spent on mobile browsers. (Smart Insights)

Consumers spend nearly **3 HRS** in mobile apps per day. (TechCrunch)



## Advancements in Location Intelligence and Insights

As consumers, we love our phones because they lend a helping hand when we need it most. They tell us where the nearest ATM is, what the weather is like, where to get great BBQ – all through the use of GPS. It's these location services that make mobile phones great tools and that make them so valuable for businesses that want to target at a hyper-local level.

According to eMarketer's 2018 Location Intelligence Study, "marketers have much better tools to vet and verify location data, and there are high-quality sources of data, including GPS directly from publishers and data service providers that filter out much of the poor-quality data."

Location data is such an important resource for marketers because it's a highly targeted way to reach the right consumer at the right time through the ubiquitous use of mobile data and location services. Additionally, location intelligence is making the online-to-offline connection more transparent. As a result of this transparency, advertisers are buying in and believing. In 2018, Simpli.fi's location-based mobile targeting solution drove an average 391% increase in incremental physical site visits for clients from target areas as reported by Geo-Conversion Lift.

Advertisers must embrace measurements that relate to sales and push their partners to adopt conversion-based metrics so they can track the important role that mobile advertising spend has on their business. Simpli.fi is working with localized advertisers to **help them move past the limiting "last click" measurement** and adopt conversion-based metrics, like cost-per-acquisition (CPA) and measuring foot traffic driven to a physical location.

**Access to location data can:**

- Provide insight into audience behavior and preferences.
- Help to gain an understanding of what drives people to a physical location.
- Inform marketers what programmatic mobile strategies are and are not working, and optimize in real-time.
- Serve as a gateway into geo-fencing, a fast-growing focus for advertisers in 2019 and beyond, and **an essential component of any location-based advertising strategy.**

## LOCATION INSIGHTS

**83%** of users consider location services crucial to their mobile experience. (Pew Research)

Despite privacy concerns, **90%** of people keep the location services function on their smartphones switched on, and this number is only continuing to rise. (eMarketer)

Over the last two years, comparable searches without "near me" have grown by **150%**. This is a clear shift toward dropping location qualifiers in search. (Think with Google)

**88%** of consumers who search for a type of local business on their smartphone call or go to that business within 24 hours. (Nectafy)

**28%** of those visits result in a purchase. (Think with Google)



The use of mobile and the resulting power of location-based targeting sits at the center of a massive industry-wide shift in the way marketers deliver targeted ads. It's easy to see the benefits. Location-based intent data helps marketers go beyond targeting on things like cookies and search data, and precisely reach the right consumers at that all-important moment when they are interacting with the digital and physical world together.

## Localized Programmatic: Who Has Adopted It and Who Needs It

The importance of localizing targeting cannot be overstated. Nomenclature, local preferences, and buying habits vary widely from city to city across the country. But it's rare for advertisers to have the in-house technology or staff to personalize campaigns to the needed degree for multiple markets.

The need for advertisers to take action is clear. At Simpli.fi, we believe advertisers should adopt a localized programmatic strategy that enables them to localize ad targeting and content, to deliver performance on high volumes of localized campaigns, and to receive deep insights on their dynamic audiences.

The advertisers who stand to benefit the most from a localized programmatic strategy are multi-location brands, agencies who service them, and local media groups seeking to localize audiences for national campaigns as well as companies who want to achieve performance on a high volume of localized campaigns.

While the reasons to adopt a localized programmatic strategy are many, it is important to understand that in order to unlock localized programmatic's potential, marketers must leverage unstructured data.

### The Transformative Power of Unstructured Data

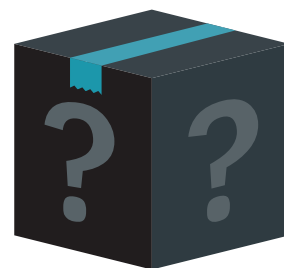
With data being the king of programmatic advertising, it is no wonder that leveraging data effectively is what the entire programmatic paradigm is built on. And there's more of it than ever before. By 2020, the global datasphere will contain more than 163 zettabytes of data (International Data Corporation).

Not surprisingly, it is hard for marketers to make heads or tails of all the available data so most Demand Side Platforms (DSPs) rely on digital gatekeepers to archive and organize certain data points to instill some structure upon the massive amounts of data that exist. However, there are many limitations to using structured data in this way and it's important for marketers to know the difference between structured data vs. unstructured data, and what they can achieve by leveraging unstructured data within programmatic.

By its very definition, structured data is information that has been scrubbed, organized, and lumped into prepackaged categories. In advertising terms, this means it's been placed into a nontransparent audience segment – a digital black box of sorts – and sold to marketers and DSPs as indicative of potential consumer behavior. Everyone in that segment is, in essence, the same person, with the same motives, interests, and character traits as their segmented counterparts. For marketers, whose ultimate goal is to connect with individual consumers on a personalized level, this can be problematic. Audience segments have significant limitations when it comes to programmatic marketing, including: unknown data sources, invisible data, limited insights into recency of intent or action, and that optimization can only occur at the segment level.

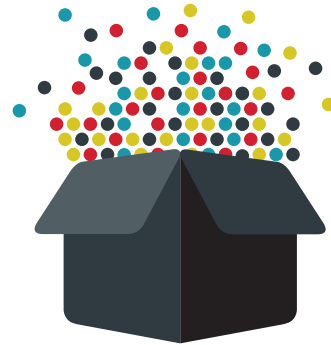
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**Third-party audience segments don't take into account local knowledge, preferences, nomenclature, and buying habits.**



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**With unstructured data, you can incorporate local knowledge and preferences to ensure you are serving the right ads to the right people.**



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This isn't a problem with unstructured data, which offers more information, more flexibility, and more reliability. The freedom to target dynamic audiences with pinpoint precision, right down to the exact mix of desired individual data points, provides advertisers with the ability to create and customize their campaigns at scale. Add things like recency, localization, and other unstructured elements to the mix, and the targeting possibilities become truly transformative. Additionally, advertisers can optimize campaigns in real-time, throughout the duration of a campaign, to minimize wasted impressions and drive higher performance.

It's the very reason why Simpli.fi took such a unique approach to programmatic targeting, building from the ground up a platform that can consume and act on this vast amount of unstructured data. The benefits to this are numerous, but here are a few:

### **1. Deeper Insights into Dynamic Audiences**

The Simpli.fi platform optimizes audiences in real-time — and it does so at the data element level. So if, for instance, ads served within 30 minutes of visiting a brand's website have a higher click-through rate than those served outside of a 30-minute window, the platform adjusts its **combinatorial bidding models** accordingly to ensure the most optimal point for delivery. This same ability to adapt applies to each and every data point, such as time of day, device type, and location, so as Simpli.fi's platform learns what's working and what isn't, the audience will evolve throughout the life of the campaign. Couple that with a completely transparent and highly granular analytics system, and advertisers receive more nuanced and insightful analysis, which in turn enables brands to continually improve their marketing efforts.

### **2. Ability to Customize Audiences to Local Needs**

Personalization as a marketing strategy is as vital and ubiquitous as ever before. So it stands to reason that a brand's strategy in, say, Kansas might differ from its strategy in California. And the widespread use of mobile devices and location data is helping marketers stretch their budgets by considering local preferences, nomenclature, and buying habits — helping to better inform their campaign strategies and get the most bang for their marketing buck.

Keywords and campaigns do not perform equally everywhere. We routinely observe significant differences in how well a keyword performs across different locations. Later in this report, there are several use cases that further illustrate the need for localization.

### **3. Delivering Performance on High Volumes of Localized Campaigns**

Because it's more flexible than its structured data counterpart, Simpli.fi's use of unstructured data can deliver not only a more efficient campaign performance, but higher volume to boot. Simpli.fi's automated processes for campaign

entry, management, optimization, and reporting enable delivery of more robust performance on a high quantity of localized programmatic campaigns, whether you're running 30 of them or 30,000.

Currently, there are over 90,000 live campaigns on Simpli.fi's platform. The ability to scale large numbers of highly targeted campaigns is a key facet of localized programmatic.

#### 4. Transparency

Every marketer deserves to know who they're targeting, what it'll cost, that the results are real and brand-appropriate, and why the campaign did or didn't work. Without a reliance on prepackaged audience segments, unstructured data illuminates the data source in ways structured data cannot, providing marketers with a deeper understanding of how, why, and where their ad dollars are being spent and enabling them to target, bid, optimize, and report at the data element level.

## Growth Areas in Localized Programmatic

### Geo-Fencing

The largest growth area for localized programmatic and the entry point for many advertisers into the local market is Simpli.fi's programmatic Geo-Fencing. For those unfamiliar, Geo-Fencing is a location-based mobile advertising technology powered by latitude and longitude data to target specific geographic areas with custom shapes. Simpli.fi can target users via mobile devices that utilize location services. Data sources and filtering models ensure highly accurate GPS data so advertisers can reach individuals based on the locations they visit.



This targeting tactic has been growing fast in terms of advertiser adoption and has largely been responsible for swaying national advertisers to invest in localized mobile ad spend. **The Global Geo-Fencing Market** is estimated to cross \$1.7 billion by 2024. As reported in the February 2018 Global Market Insights report, "the Geo-Fencing market growth is attributed to the... extensive proliferation of mobile devices such as smartphones and tablets, along with rising demand for proximity marketing solutions. The utility of mobile devices is widening as they are consolidating their role as central medium to reach an ever-expanding portfolio of applications and services."

### GEO-FENCING ADOPTION INSIGHTS

**An analysis of Simpli.fi's data further illuminates the increased advertising adoption of Geo-Fencing. In 2018 compared with 2017, Simpli.fi saw:**

A **54%** growth in advertisers including Geo-Fencing in their targeting mix, resulting in 69,711 Geo-Fencing advertisers in 2018.

A **47%** growth in the number of Geo-Fencing campaigns on the Simpli.fi platform, resulting in a total of 187,848 Geo-Fencing campaigns in 2018.

A **43%** growth in the number of Geo-Fences set up on the Simpli.fi platform, resulting in 9,373,102 Geo-Fences in 2018.



### Geo-Fencing is ideal for advertisers who wish to:

- Drive loyalty marketing strategies by targeting customers who have previously visited your physical location.
- Conquest competitors' locations and build a unique audience of potential customers who have already expressed interest in a similar product or service.
- Target potential customers who have visited specific locations of interest relevant to your product or service, or are within a predetermined physical proximity to your business.
- Reach customers who have attended an event at a specific date, time, and location by utilizing Event Targeting.
- Target individual households and businesses at the address-level with mobile, video, and OTT/CTV ads.

### Geo-Fencing with Conversion Zones takes the concept even further by enabling advertisers to:

- Track offline or “last mile” conversions to measure your advertising success.
- Evaluate campaign effectiveness with a wealth of reporting metrics.
- Determine which foot traffic was naturally converted vs. influenced by an ad with Simpli.fi's Geo-Conversion Lift metric.

With unstructured data, the promise of one-to-one advertising is a reality.

## GEO-CONVERSION LIFT: FOOT TRAFFIC ATTRIBUTION & INSIGHTS

### Determine which foot traffic was naturally converted vs. influenced by an ad with Simpli.fi's Geo-Conversion Lift Metrics

Analyze your Geo-Fencing campaigns in how they are driving traffic to their Conversion Zones with Simpli.fi's Geo-Conversion Lift and Geo-Conversion Lift Overview Dashboard in the Reporting and Analytics Center. Metrics within this dashboard include:



**Campaign Conversion Rate\***: The percentage of users who were detected in a target zone, were then served an ad, and then were detected in a Conversion Zone for the same campaign.

**Natural Conversion Rate\***: The percentage of users that have been detected in a target zone, not served an ad, and then detected in a Conversion Zone for the same campaign.

**Geo-Conversion Lift\***: Percentage difference in Campaign Conversion Rate vs. Natural Conversion Rate.

**New User Campaign Conversion Lift\***: The Campaign Conversion Lift with repeat converters excluded.

**Natural Days to Convert**: The average number of days it takes users, whether they've been served an ad or not, to go from a target zone to the Conversion Zone.

**Campaign Days to Convert**: The average number of days it takes users who were served an ad to go from a target zone to the Conversion Zone.

### Additional Conversion Zone Reporting Metrics

- Impressions
- Total Spend
- Clicks
- View Through Visits
- Click Through Visits
- Total Visit Rate (TVR)
- Cost Per Visit
- Daily Vist
- Daily Total Conversion Zone
- Visits

\*With breakouts of daily new and repeat users to further increase transparency of conversion metrics

## Addressable Geo-Fencing

With location-based targeting becoming a key part to any marketer's strategy, more and more advertisers are finding a need for more granularity, precision, and scalability when it comes to their targeting efforts, especially at the address-level. Enter Simpli.fi's Addressable Geo-Fencing, a powerful, efficient, and accurate new way to target specific households and businesses with digital advertising, such as mobile, video, and/or OTT/CTV ads.



Addressable Geo-Fencing is the next logical step in the localization and personalization of programmatic advertising, and is built on Simpli.fi's highly scalable technology stack. The solution uses plat line and GPS data, rather than IP-based targeting, to deliver programmatic advertising using first party address data such as CRM lists and other offline databases. Don't have access to first party data? Simpli.fi can curate lists on behalf of advertisers based on over 1,500 variables. Addressable Geo-Fencing is an excellent complement to other address-based marketing initiatives such as addressable TV and direct mail as it provides extended reach, increased frequency, and improved attribution.

Simpli.fi's solution meets a significant market need at a time when advertisers increasingly want to localize and personalize their campaigns, and when solutions like IP-based targeting are being hobbled by truncation of IP addresses in the programmatic bid stream.

## OTT/CTV

It is becoming more and more important for marketers to incorporate OTT/CTV advertising into their marketing mix as consumers' viewing habits continue the shift towards streamed content.

The changing landscape of how consumers view television content is already influencing how television ad inventory is traded, and the proliferation of content creation on streaming channels is influencing the need to monetize that content.



## OTT/CTV ADOPTION INSIGHTS

2018 saw an **8X increase** in people who have access to three or more OTT/CTV subscription services. (Video Advertising Bureau)

More than **180 million Americans** a month stream content using OTT/CTV devices. (Video Advertising Bureau)

OTT/CTV now accounts for roughly **one in five hours** of all TV viewing. (AdWeek)

Over **60%** of U.S. households own at least one OTT/CTV device. (Video Advertising Bureau)

OTT/CTV-only households now number **14.1 million** and will continue to increase. (MultiChannel)

Simpli.fi forecasts that 2019 will see a massive acceleration of budget shifting as TV buyers rearrange their linear budgets to test the reach and frequency that OTT/CTV brings with its pinpoint inventory of household demographics and behaviors. This will be especially true in light of the enhanced targeting capabilities, analytics, and attribution that come with OTT/CTV.

While most programmatic platforms are limited in how they can approach OTT/CTV targeting, Simpli.fi has purpose-built our solution to offer three distinct methods of audience targeting to enable advertisers to reach their ideal audience on OTT/CTV devices: addressable, behavioral, and demographic.

With Addressable targeting, Simpli.fi provides advertisers with the most granular way to deliver OTT/CTV ads to individual households. Using GPS data, advertisers can precisely and accurately target by physical address. This is a great way to leverage CRM and other offline databases to build custom audiences for OTT/CTV targeting. And with free list onboarding and the ability to target one million addresses per campaign with unlimited campaigns, advertisers get to do so at scale.

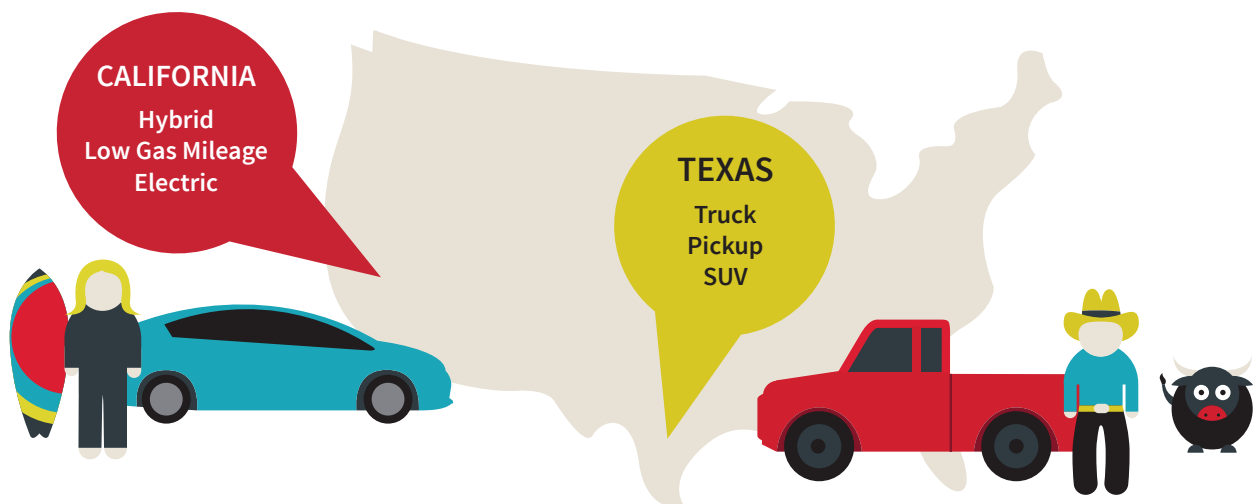
Simpli.fi's behavioral targeting brings the precision of digital targeting to OTT/CTV by giving advertisers the ability to target users based on keywords, context, and various other online behaviors. This lets advertisers cover a different set of bases with their OTT/CTV targeting, and provides another granular method for reaching the right audience.

Demographic remains a tried and true method for targeting specific audiences. Simpli.fi takes advantage of numerous combinations of demographic variables to give advertisers yet another way to target their ideal audience with OTT/CTV ads.

With three distinct methods of audience targeting paired with the capability to target on both the big and small screens, Simpli.fi's OTT/CTV solution is a key driver of a platform-wide video growth of 96% over the last year, and we expect this number to continue to grow in 2019.

## The Right Keywords for the Right Location

In order to demonstrate the variance of keyword and campaign performance by location, we analyzed active campaigns across several of the industries represented on the Simpli.fi platform. After this analysis, the findings are evident. No matter the industry, performance clearly varies by geography which demonstrates the need for Simpli.fi's localized programmatic solution.



## Keyword Performance Varies by Location

No one keyword works for all geographical locations or audiences. Simpli.fi's localized programmatic technology helps advertisers automatically optimize for and select the keywords that have the highest probability for performance. To demonstrate this, here are a few examples.

We analyzed the common auto-related keyword "tires" and examined how it performed in two separate states: Washington and Virginia. In this analysis, the CTR for "tires" in Virginia was double that of the same keyword in Washington. Simpli.fi's technology is built to recognize this variance in CTR and deliver traffic accordingly, driving keyword and overall campaign performance. The auto industry is ripe for the transformative benefits of localized programmatic. Over the last year, Simpli.fi has seen a 59% increase in campaigns covering the auto industry and currently have over 12,000 live campaigns on the platform.

Similar to auto, the QSR and food industry is also a perfect pairing for localized programmatic and the numbers reflect the advertiser adoption. In the last year alone, Simpli.fi has seen a growth of over 42% in food-related advertising campaigns. For this report, we analyzed QSR-specific keywords such as "restaurants," "kids restaurants," "food," "sandwiches," "wine," and "pizza." When looking at these keywords to consider their performance and delivery at a national level, the best keyword in terms of national performance is "restaurants" with nearly double the amount of impressions of the next keyword. However, when we break this out by state, we see that the local story is different. With the state data included, suddenly "kids restaurants" takes the top placement whereas at the national level "kids restaurants" was second. With the state level data included, California alone makes up almost half of all demand for "kids restaurants." Additionally, California makes up the top state for "restaurants" and "food," and Virginia is the top state for searching "sandwiches."

Let's look at another industry – education. Looking at the national results for keywords related to education/colleges, the U.S. is pretty divided in terms of who uses the terminology "college" and who uses "university." While "college" is more predominant, "university" is still one of the more prominent keywords used. "College" is used most in New York, but when the search term is changed to "university," New York loses its top spot and is replaced by Pennsylvania. In addition, Missouri suddenly shows up as the third most popular state to search "university." In the last year Simpli.fi has seen the number of education campaigns grow 16%, pointing to a not yet fully capitalized opportunity by educators to stand out among their competitors and reach their localized audience.

## Performance is Often Hyperlocal

What works in one town may not work as well in nearby locations. Because of this, it makes sense to split campaigns targeting large areas (such as an entire state) into multiple, smaller campaigns that can be optimized independently of each other based on local performance.

To illustrate this, let us take two comparable campaigns promoting weight-loss solutions. One campaign targeted a large portion of the state of Massachusetts while the other was much smaller, targeting a very limited area of the same state. Both campaigns featured similar keyword lists, including the keyword "nutrition." The overall performance of "nutrition" across all locations included in the large MA campaign was very poor, at 0.04%. Conversely, the keyword worked well in the small, local campaign, at 0.15%. Chances are that other areas included in the large campaign would have also had keywords that would have performed better locally, had it been split into several smaller local campaigns.

## Timing – or Recency – Also Matters

Campaign performance is often related to recency. The value of when you target an audience can vary significantly based on when the action or behavior took place. While this adage is true in all industries, it is demonstrated clearly here in the travel industry where it's important to time advertising to capitalize on the decision-making

process. We looked at the search term “hotels” to demonstrate how recency can impact the performance of an ad in different states. While performance in the state of Florida with two different recency settings (ads targeted at one day vs. one month) has no significant performance difference, advertising in the states of Arizona and Illinois almost doubled the CTR with a recency setting of one month instead of one day.

These findings demonstrate the diversity of keyword and campaign performance by location. Manually planning for this array of local preferences would be a tall order for any advertiser, which is why companies who select Simpli.fi as their localized programmatic partner experience a sound leg-up on their competition.

## Final Thoughts

The growth of localized programmatic is a result of marketers seeing the need for advertising that is more personal and local in order to achieve higher performance. It’s imperative for advertisers to be mindful of the market forces and consumer expectations that are powering this meaningful shift to localization, and have informed conversations about the benefits to adopting a localized programmatic strategy.

Simpli.fi is able to analyze far more factors to determine the best times and places to deliver impressions, thanks to the unique partnership of combinatorial bidding with unstructured data. Our models are always learning and adapting in real-time, based on their current effectiveness within that specific localized campaign - or similar campaigns, in order to optimize models more quickly. And with unstructured data, Simpli.fi has the flexibility to determine which factors (keywords, recency, etc.) will have the most influence over campaign performance, thus optimizing impressions from the targeting stage through delivery. In essence, a better-informed localized targeting strategy begets a more receptive audience, which means campaigns are better tailored to meet the unique goals of each advertiser.

### KEY TAKEAWAYS FOR ADVERTISERS

**It is imperative to adopt a localized programmatic strategy**, enabling advertisers to localize ad targeting and content in order to achieve higher performance and deeper insights into their dynamic audience.

**The powerful one-two punch of mobile and location-data** allows marketers to go beyond targeting on things like cookies and search data and precisely reach the right consumer at that all-important moment when they are interacting with the digital and physical world together.

**Leverage unstructured data** in order to unlock the transformative power of localized programmatic’s potential.

With location-based targeting becoming a key part to any marketer’s strategy, be sure to **take advantage of industry-leading technology such as Simpli.fi’s Geo-Fencing, Addressable Programmatic, and OTT/CTV solutions.**

Interested in learning more about how you can utilize Localized Programmatic?

Continue the conversation with us on Twitter [@Simpli\\_fi](#) or email us at [hi@Simpli.fi](#).

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