

Programmatic DOOH 2022

Australia white paper



State of the Nation

Content

01 Introduction

02 The State of Play

- ◆ Current adoption of programmatic DOOH
- ◆ Drivers of programmatic DOOH adoption
- ◆ Programmatic DOOH as part of the programmatic omni-channel media mix
- ◆ Full funnel activation

03 Defining the new landscape (What is next for programmatic DOOH?)

- ◆ Expected demand for programmatic DOOH
- ◆ In-house investment

04 Overcoming barriers to adoption

- ◆ More widespread understanding of programmatic DOOH
- ◆ Measurement and case studies
- ◆ Precision targeting and real-time audience data

05 Summary

Executive summary



In June 2022, VIOOH partnered with MTM to survey 1,000 agency and advertising executives across Australia, the US, UK, Germany and France on their perceptions of programmatic digital out-of-home (DOOH), their approaches to planning and buying, comparisons to other media, and the future of programmatic DOOH.

In Australia, growth in programmatic DOOH over the last 12 months has been driven, in part, by a widespread preference for agility in campaign strategy and execution as a result of the COVID-19 pandemic. Recognising that buying DOOH programmatically enables flexibility to respond to changing consumer behaviour and contexts, demand for programmatic DOOH has increased from advertisers across all sectors, with Australian media executives reporting increases in both the number of advertisers investing in the channel, and the amount of budget invested.

Australian media executives identify the ability to employ a wealth of different data sources to target consumers at a granular level as a key driver in the growth of programmatic DOOH, in line with global executives. Many are excited about the prospect of overlaying real-time audience data to target consumers and optimise campaigns and believe that the ability to do this across campaigns will prompt further growth in the channel.

Mirroring sentiments shared by executives globally, Australian media executives have affirmed the value of programmatic DOOH's hybridity as both a broadcast and a direct response channel, using it to drive results in both performance and brand focused campaigns. Furthermore, Australian media executives have expressed keenness to take advantage of the dynamic creative opportunities enabled by programmatic DOOH, with many excited to engage with audiences in creative and meaningful ways.

Opting for an omni-channel approach to planning and buying campaigns is now standard practice for many. As such, programmatic DOOH is frequently bought alongside other channels, with social media and digital video the most popular channels to pair it with, according to Australian media executives.

Within this context, Australian media executives have pointed to the importance of robust, unified measurement solutions in articulating the value of programmatic DOOH, and isolating its effect within multi-channel campaigns. Similarly, the provision of case studies with clear, measurable outcomes will help Australian advertisers communicate the benefits of programmatic DOOH to clients and colleagues.

Despite challenges, demand is expected to continue to grow over the next 12 months, with more campaigns in Australia expected to include programmatic DOOH and Australian media executives planning to increase investment. Moving forward, executives plan to continue investing in in-house programmatic DOOH expertise, focusing on upskilling and educating programmatic, OOH and cross-channel planning desks to increase programmatic DOOH's presence on plans.

Introduction

Programmatic digital out-of-home (programmatic DOOH) has caused quite a splash in the world of out-of-home advertising. Whilst the advent of programmatic buying (technology-enabled automated transactions of ad inventory) within digital advertising dates back a couple of decades, the technological capabilities of programmatic that enables advertisers to scale and precisely target specific audiences, and optimise campaigns in real-time, were only extended to out-of-home in more recent years.

Since then, advertisers have been increasingly open to taking advantage of the benefits that programmatically-enabled OOH provides, enjoying greater flexibility in campaign execution and the ability to target relevant audiences at key moments to drive sales outcomes. However there remains scope for further growth in the channel.

This white paper, based on an extensive survey of media executives across five of the largest markets globally, looks at the Australian market specifically and in comparison to global averages. It discusses some of the big questions for programmatic DOOH for today and in the future: How comfortable – and knowledgeable – are digital and OOH media professionals on programmatic DOOH and its benefits? How will investment levels change for this channel in the future? What barriers need to be overcome to facilitate further adoption and growth?

VIOOH partnered with MTM to survey 1000 media executives from media agencies and brands across Australia, the UK, USA, Germany and France to understand the industry's perceptions of programmatic DOOH, and how it contributes to omni-channel strategies. This multi-market approach, gathering opinions from across the industry, provides an unparalleled perspective at global and local levels to understand the State of the Nation of programmatic DOOH.



Programmatic DOOH: Distinctly unique

Whilst programmatic DOOH is closely related to direct or automated DOOH, there are several key points of difference that separate the two.

Direct DOOH is pre-planned, and bought in advance of activation via media owners, agencies, and OOH specialists. When a direct DOOH campaign is bought, a time frame for the campaign is agreed and set, and specific days and times to display the nominated creative are outlined. Media owner, first party client or agency data is employed to define and target desired audiences, and advertisers and agencies work with the OOH media owner directly to manually align their DOOH audiences and activity with other digital channels on the plan. Following the conclusion of a DOOH campaign, brands and agencies can look at the impact on their branding and sales metrics, as well as measuring footfall.

Conversely, programmatic DOOH inventory is bought in real-time or near real-time through demand side platforms (DSPs) that facilitate ad exchanges via private marketplaces (PMPs) or Open Exchanges using open real-time bidding (RTB). Unlike DOOH, programmatic DOOH does not require upfront commitments or predefined schedules, enabling advertisers to buy inventory in real-time, and optimise campaigns in-flight. Brands and agencies can use a range of data sources, including third party data, to inform activation and targeting of campaigns, and a single buy-side platform (DSP) for multiple digital channels enables automated targeting and optimisation across touchpoints with minimal wastage.

Additionally, trigger-based targeting and activation allows brands to ensure maximum relevance of creative, by optimising for triggers which are contextual (location, weather, time, presence of audience) and/or non-contextual (promotions, sales data, major events). Additionally, advertisers don't have to sit and wait to review the campaign performance. Near real-time reporting permits advertisers to observe which locations are performing the best or worst, and optimise their campaign by moving spend to locations that are performing well.





Current adoption of programmatic DOOH

Appetite and demand for buying digital OOH programmatically has markedly increased over the last few years. It's no secret that the technical capabilities of the channel have evolved significantly since its inception. Today, advertisers can overlay a wealth of data sources to target audiences with laser precision. This, coupled with the flexibility that programmatic digital OOH offers to optimise campaigns in-flight, has afforded advertisers greater opportunities to access relevant audiences in the right place and at the right time.

As outlined in our previous State of the Nation reports, the COVID pandemic that characterised 2020 and 2021 prompted an uptick in adoption of programmatic DOOH. Major shifts in audience behaviour forced advertisers to re-evaluate campaign execution strategies, ditching set-in-stone pre-bought campaigns in favour of more flexible means of activation (e.g. programmatic activation).



The tech capabilities of programmatic DOOH, relatively low entry investment, ability to pivot quickly and being more data and audience led are strong draws for clients

Whilst the day-to-day effects of the pandemic are largely over, advertisers have become accustomed to agility in campaign strategy and execution, and greatly value the ability that programmatic buying affords to quickly respond to changing consumer behaviour and reach audiences where they are. **In the last 18 months, nearly half (49%) of campaigns in Australia (+2% pts vs. 2021) have included programmatic DOOH (vs 51% globally).**

49%

**OF AUSTRALIAN CAMPAIGNS
IN THE LAST 18 MONTHS
HAVE INCLUDED
PROGRAMMATIC DOOH**

In addition, low barriers to entry (relative to its traditional counterpart) means that a significant number of advertisers who have not previously spent on OOH are now taking a test-and-learn approach with programmatic DOOH, reaping the benefits of its hybrid broadcast/digital nature (i.e., public-facing screens with the flexibility and granularity of digital).



"As a channel, it's grown massively, and the budgets are growing year on year. We are seeing a real appetite for doing traditional media through digital, programmatic pipes"

Sam Buchanan
CEO, Independent Media Agencies Australia

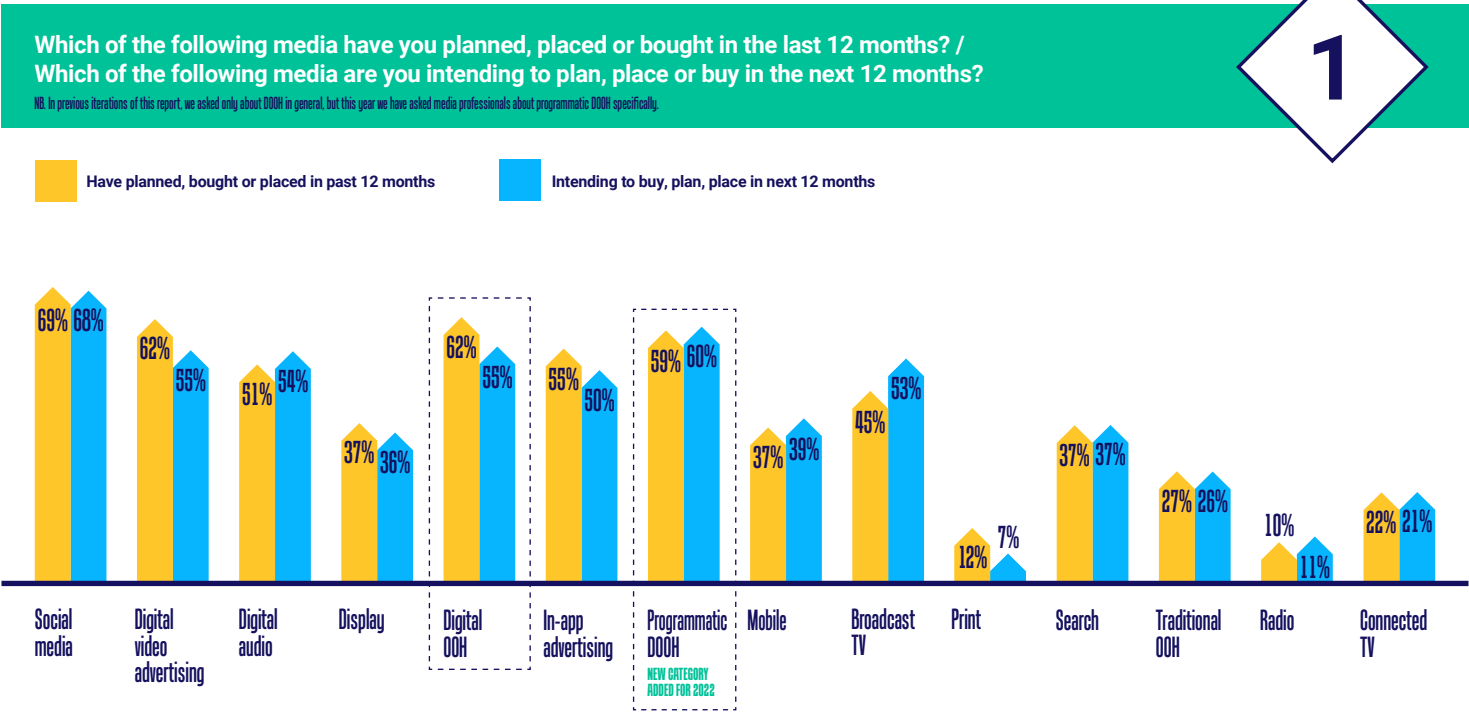
"We are getting more and more interest from clients that have never done out-of-home before, because a) we can measure the same way as we do in digital in terms of audiences and b) buying from DSPs means we can offer more granularity with reporting. Low barriers to entry always open up a lot of opportunities, for clients that want to test and learn"

James Lambert
Head of Sightline, GroupM Australia



Interest in programmatic DOOH is coming from advertisers across all sectors, although it is particularly popular in sectors where contextual or location-based messaging is most relevant (e.g. auto, FMCG/CPG, retail, tourism).

Demand is expected to continue to grow over the next 12 months. When we asked Australian media professionals about which media they are intending to place/plan or buy in the coming year, programmatic DOOH was one of the few media types selected where executives believe they are likely to increase investment. **59% said they have planned, bought or placed DOOH programmatically in the last 12 months (vs 46% globally), and this is set to increase to 60% in the next year (vs 48% globally).**



Notes: Considering all media types we selected less than in 2021, we recommend focussing only on 2022 data and that PDOOH show growth opportunity in next 12 months while other media types show stability or likely decrease in investments
1) Social media includes Facebook, Instagram, Twitter etc. 2) Digital audio includes streaming audio, streaming and podcasts 3) Search includes pay-per-click 4) Display excludes social media 5) Mobile excludes in-app advertising 6) Broadcast TV excludes TV advertising served via the internet
Source: A8. Which of the following media have you planned, bought or placed in the last 12 months? A9. Which of the following media are you planning to, or open to advertising for in the next 12 months?
Base size all respondents (202)



"It's a great opportunity for clients to spend in OOH for the first time, or for lapsed spenders to reinvest in OOH. The tech capabilities of programmatic DOOH, relatively low entry investment, ability to pivot quickly and being more data and audience led are strong draws for clients"

James Lambert
Head of Sightline, GroupM Australia

Whilst some advertisers are converting existing traditional and DOOH budgets to buy programmatic DOOH, there is also significant growth coming from new budgets, and from other digital and traditional channels. **39% of Australian media professionals say they have added new budgets to programmatic DOOH (vs 37% globally), 10% have moved budget from other traditional channels (vs 21% globally) and 14% have utilised existing digital budgets (vs 21% globally).**

If budget is going to be increased for programmatic digital out-of-home, where is this budget being moved from?

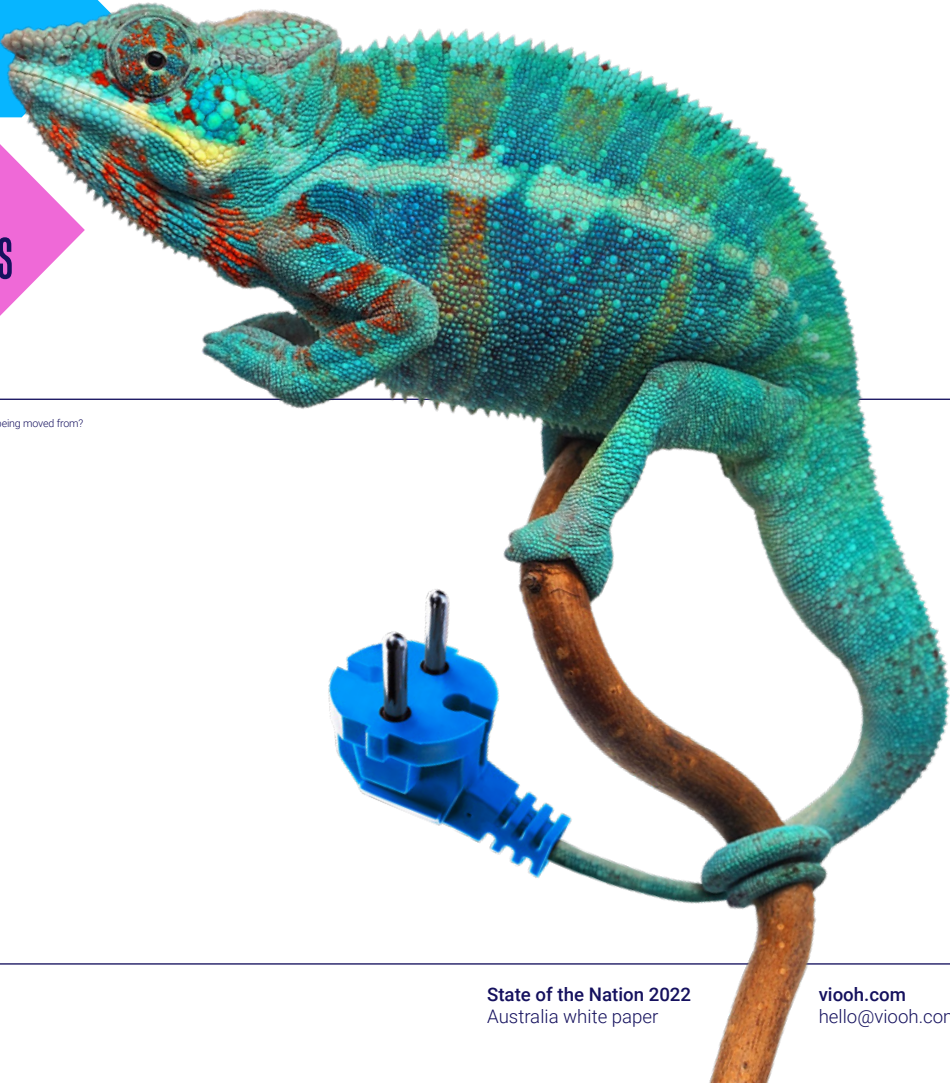
2

46% TRADITIONAL OOH

39% NEW BUDGET ADDED

14% OTHER DIGITAL CHANNELS

10% OTHER TRADITIONAL CHANNELS



Notes: Source C4.1 If Budget is going to be increasing for programmatic digital out-of-home, where is this budget being moved from?
Base size: all increasing PDOOH or DOOH (200); agency (96); advertiser (104)



Drivers of programmatic DOOH adoption

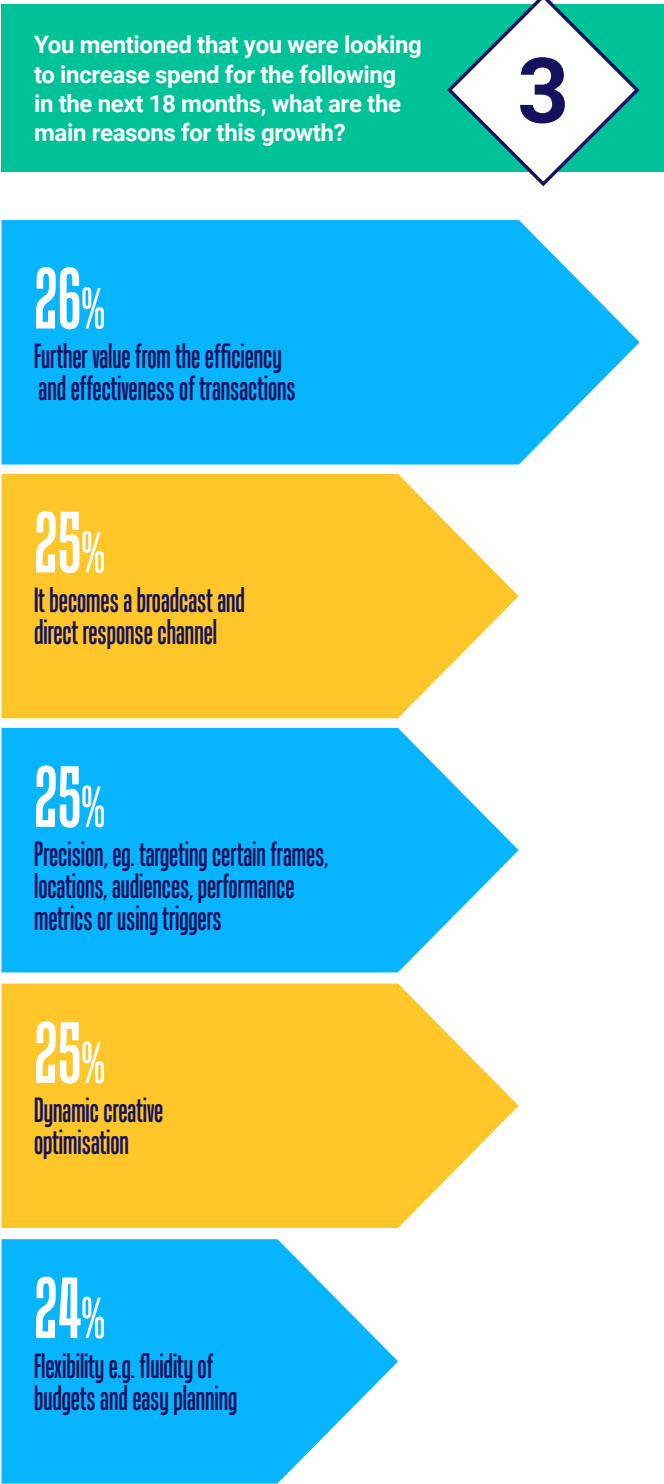
Programmatic DOOH delivers a range of benefits for advertisers.

Buying OOH programmatically adds a layer of agility to campaigns that cannot be delivered through traditional OOH. For example, advertisers can reduce wastage and maximise campaign effectiveness by harnessing trigger-based buying to quickly react to what is happening in the outside world in real-time. Furthermore, the ability to trigger or target based on contextual data (e.g. weather, location, demographic of people who live/work nearby) provides brands with certainty that their messaging will have maximum contextual relevance to deliver results.

26% of media executives in Australia believe that this efficiency is a significant strength of programmatic DOOH, ranking it as the top reason (#1 in Australia vs joint #2 globally) for increasing spend in the channel over the next 18 months.

More broadly, the ability to overlay a variety of different data sources to inform activation (e.g. contextual data, mobile data, audience data, sales data, availability of merchandise stock) enables programmatic DOOH to target consumers at a hyper-granular level. Advertisers recognise this as a key driver in the growth of programmatic DOOH, with **a quarter of Australian executives (25%) selecting precision targeting as an important factor (ranked joint #2) likely to influence spend increases over the next 18 months.**

Finally, advertisers greatly value the duality of programmatic DOOH to be both a broadcast and a direct response channel, as required. **25% of executives in Australia believe that this hybridity will be one of the primary reasons (ranked joint #2) that spend increases in the channel in the near-term.**



“Flexibility, speed, agility, optimisation, and more measurable outcomes. It’s easier to solve business challenges because we can integrate with an omni-channel approach”

James Lambert
Head of Sightline, GroupM Australia

“Dynamic advertising and hyper targeting will continue to grow at a dramatic rate”

Sam Buchanan
CEO, Independent Media Agencies Australia

Notes Precision means targeting certain frames, locations, audiences, performance metrics or using triggers
Source: C4. You mentioned that you were looking to increase spend for the following in the next 18 months, what are the main reasons for this growth?
Base size: all who place PDOOH (200)

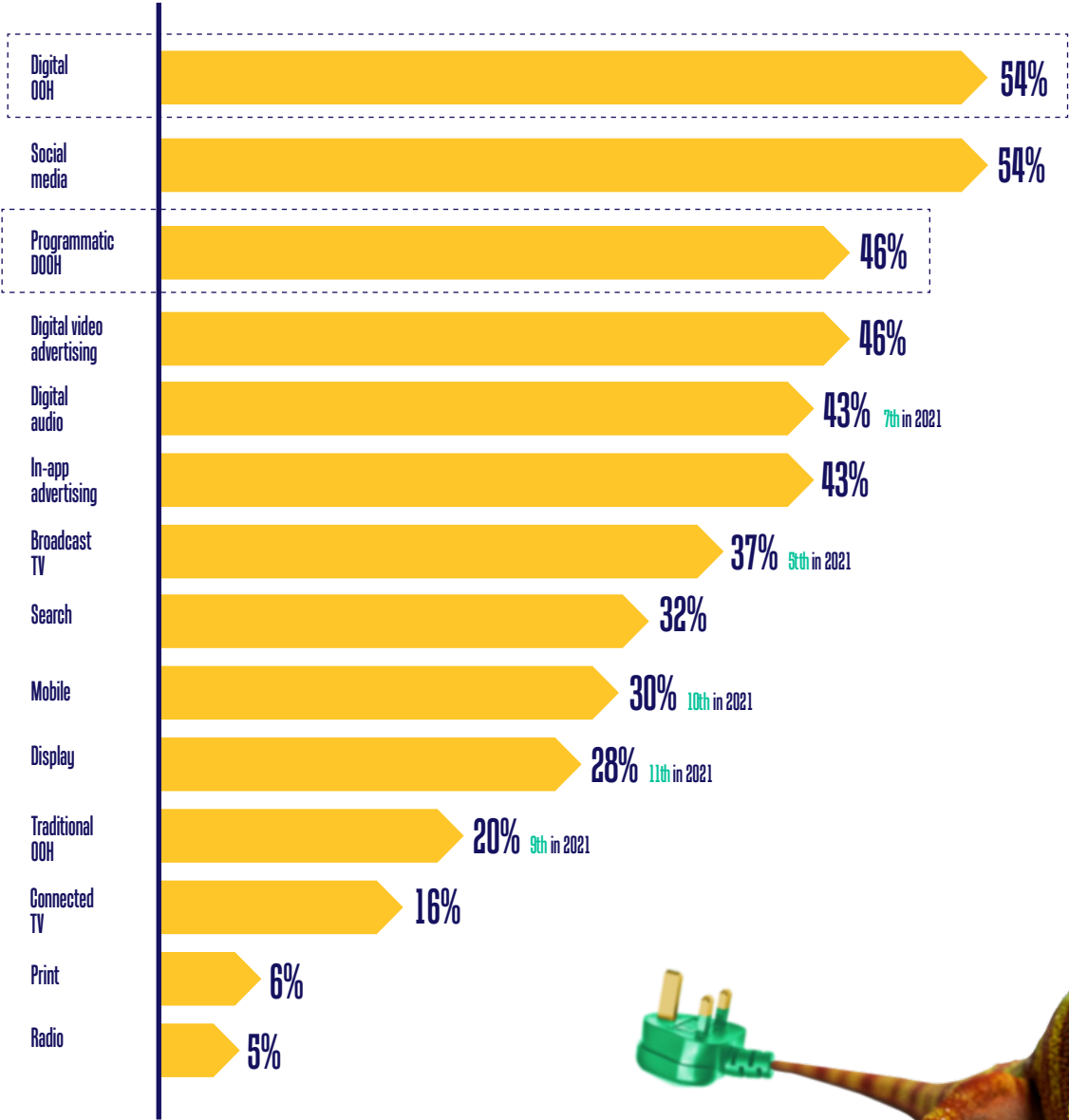
Moreover, advancements in the technical capabilities of programmatic DOOH continue to deliver new and innovative opportunities for advertisers to reach and engage with audiences. For example, advertisers are taking advantage of the ability to use dynamic creative (e.g. 3-D, video, etc.) to deliver relevant messages in real-time and engage with audiences in creative and meaningful ways.

As a result, it's no surprise that executives in Australia continue to select DOOH (54%) and programmatic DOOH (46%) as two of the top four media types developing the most innovative opportunities for advertisers.

Flexibility, speed, agility, optimisation. We can integrate with an omni-channel approach

Which of these media are developing the most innovative opportunities for advertisers?
NA. In previous iterations of this report, we asked only about DOOH in general, but this year we have asked media professionals about programmatic DOOH specifically.

4



Notes: 1) Social media includes Facebook, Instagram, Twitter etc. 2) Digital audio includes streaming audio, streaming and podcasts 3) Search includes pay-per-click 4) Display excludes social media 5) Mobile excludes in-app advertising 6) Broadcast TV excludes TV advertising served via the internet 6) % refers to YOY change Source B7. Which of these media are developing the most innovative opportunities for advertisers?

Base size all respondents (202)

Programmatic DOOH as part of the omni-channel media mix



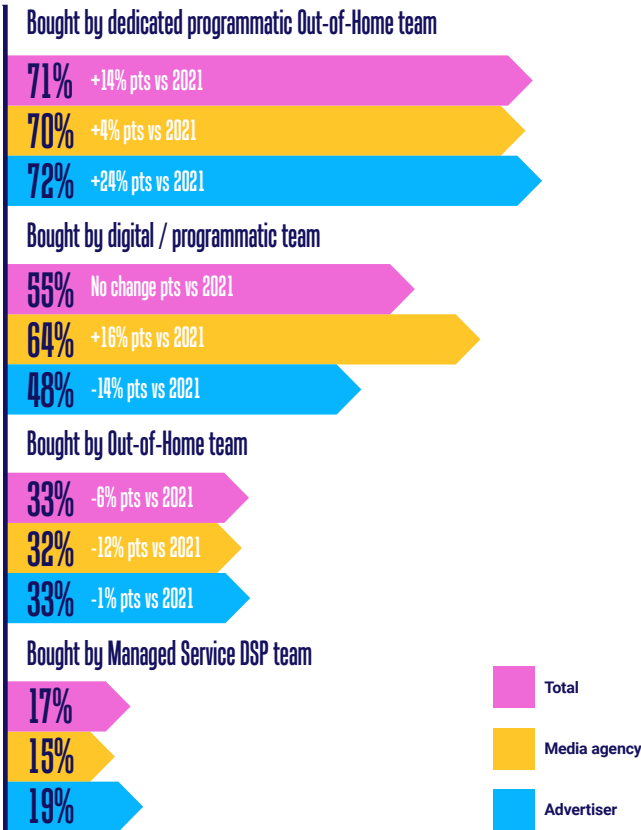
Today, it is standard practice for advertisers to take an omni-channel approach when planning and buying programmatic campaigns, and this is now extending to include digital out-of-home.

Buying programmatic DOOH alongside other programmatic channels delivers a range of benefits to advertisers. An integrated, omni-channel approach provides advertisers with access to the same audience across multiple touchpoints, enabling them to reinforce campaign messaging and build frequency. In the same way, a single view of a campaign enables advertisers to manage frequency capping, as they are able to monitor campaign exposure and turn on/off different channel activations as needed. This shift towards an omni channel strategy is reflected in the teams that are buying programmatic DOOH.

This year agency executives in Australia are reporting a decrease in buying through OOH teams (-12% pts) and an increase in buying through digital/programmatic teams (+16% pts).

How has the programmatic Out-of-Home advertising you have placed/ planned or bought in the last 12 months typically been bought?

5



Notes Source: C3. How has the programmatic Out-of-Home advertising you have placed/planned or bought in the last 12 months typically been bought?
Base size: all who place PDOOH total (97), agency (50), advertiser (47)



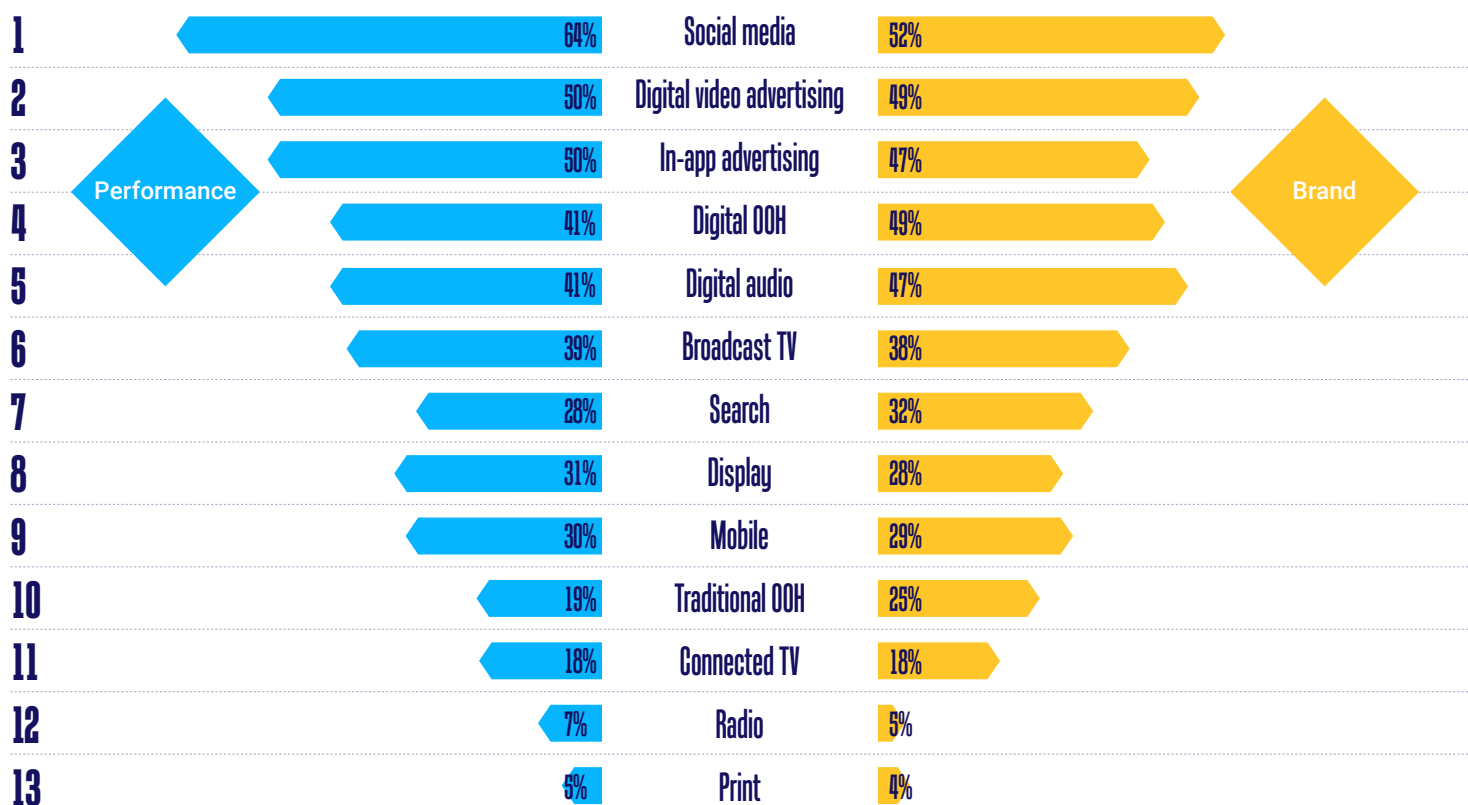
"We sell programmatic DOOH in order to have an omni-channel experience. So typically its alongside CTV, mobile, and display"

James Lambert
Head of Sightline, GroupM Australia

As such, channels that can be bought programmatically remain the most popular channels to run alongside programmatic DOOH. In line with executives globally, Australian executives have selected **social media** as the most likely pairing for both performance (64% in Australia vs 56% globally) and brand-led campaigns (52% in Australia vs 51% globally), closely followed by digital video advertising.

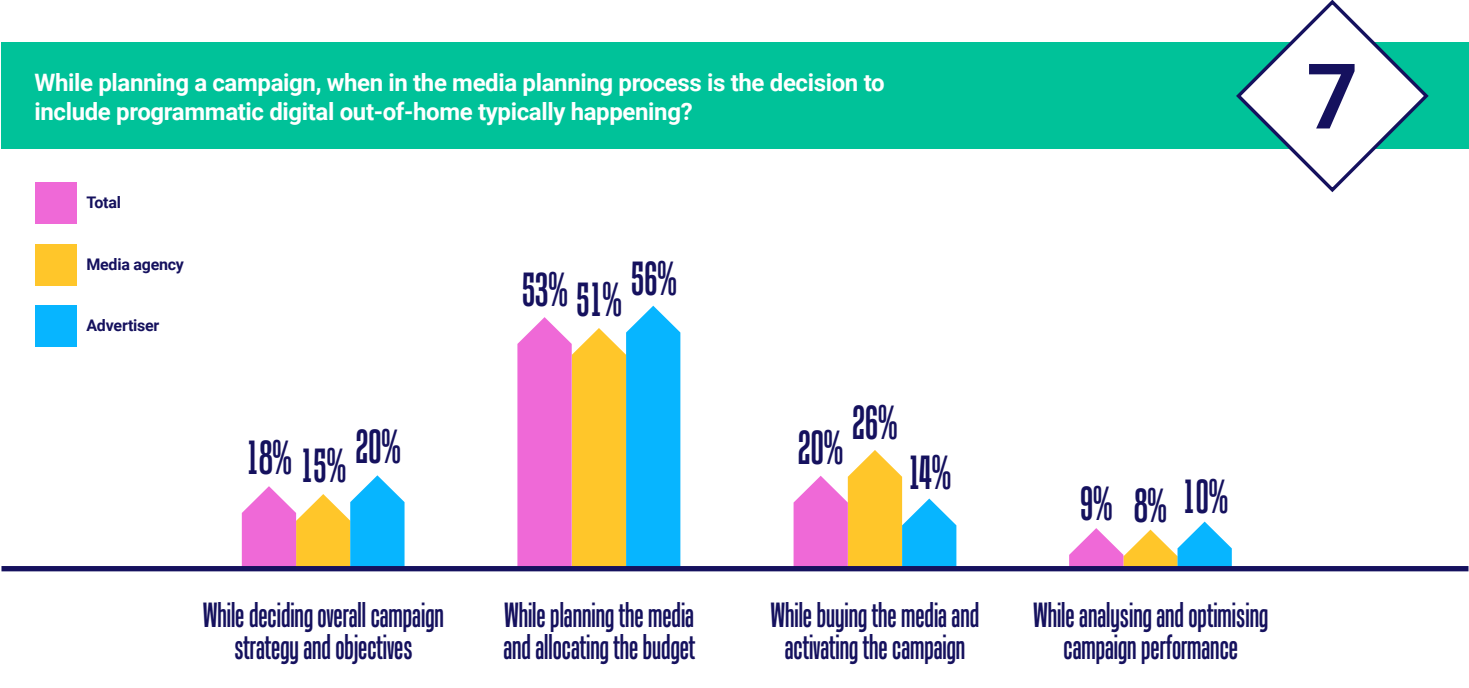
Thinking about performance/brand-led campaigns, which channels would you consider running programmatic DOOH alongside?

6



Notes: 1) Social media includes Facebook, Instagram, Twitter etc. 2) Digital audio includes streaming audio, streaming and podcasts 3) Search includes pay-per-click 4) Display excludes social media 5) Mobile excludes in-app advertising 6) Broadcast TV excludes TV advertising served via the internet 6) % refers to YOY change
Source: 01/02 Thinking about performance /brand-led campaigns which channels would you consider running programmatic DOOH alongside?
Base size: all respondents (202)

Demonstrating the importance of an omni-channel strategy, 71% of Australian media professionals make the decision to include programmatic DOOH during the early stages of the campaign planning and activation process, with **18% deciding to include it during the campaign ideation/strategizing phase (vs 25% globally), and 53% while planning the media and allocation of budgets (vs 49% globally).**



Notes Source: C8. While planning a campaign, when in the media planning process is the decision to include programmatic digital out-of-home typically happening?
Base size: all respondents (202) agency (98) advertiser (104)

11

71%

OF AUSTRALIAN MEDIA PROFESSIONALS INCLUDE PROGRAMMATIC DOOH DURING THE EARLY STAGES OF CAMPAIGN PLANNING

“We have a team of OOH and programmatic experts working together. Prior to that, programmatic DOOH sat more with the traditional OOH team, but the goal for programmatic DOOH specialists is to get involved more in the strategy and planning layer within the agency before it gets to the investment teams, that way we can really understand where it fits, and the opportunity for the client”

James Lambert
Head of Sightline, GroupM Australia

Full funnel activation

Advertisers use programmatic DOOH for both brand and performance objectives, depending on the specific goals and requirements of each individual campaign.

Programmatic is generally considered to have broadened DOOH's appeal as a hybrid medium, combining the mass-reach of broadcast - conducive to branding and upper funnel activities - with data-driven dynamism, synonymous with digital performance marketing and lower funnel conversions.



"We take an audience-led approach; some are more brand focused clients, some might need more flexibility. There is an element of both performance, and brand in this channel"

James Lambert
Head of Sightline, GroupM Australia

"Typically [programmatic DOOH] is for branding campaigns, but if the ad is outside a supermarket, it will be a call-to-action campaign"

Sam Buchanan
CEO, Independent Media Agencies Australia



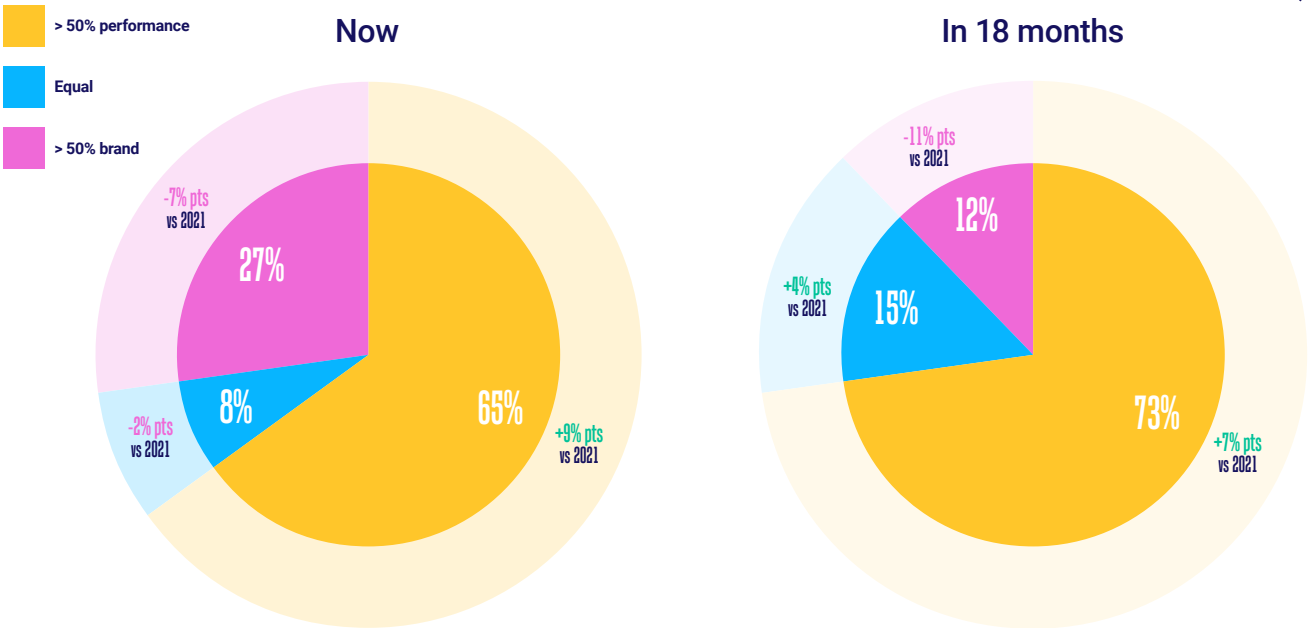


We take an audience led approach; some are more brand focused clients, some might need more flexibility

Whilst allocation of performance and brand spend on programmatic DOOH is done on a case-by-case basis, more broadly, advertising budgets currently skew towards performance spend in Australia and globally (65% in Australia vs 59% globally). **This is expected to continue into 2023, with performance focused campaigns predicted to take the lion's share of budget in Australia (73%) and globally (63%),** perhaps unsurprisingly given current uncertainties around the broader economic outlook.

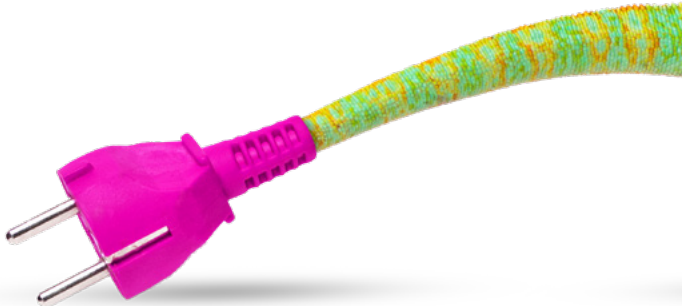
What percentage breakdown is your performance vs branding budgets now / in 18 months time?

8

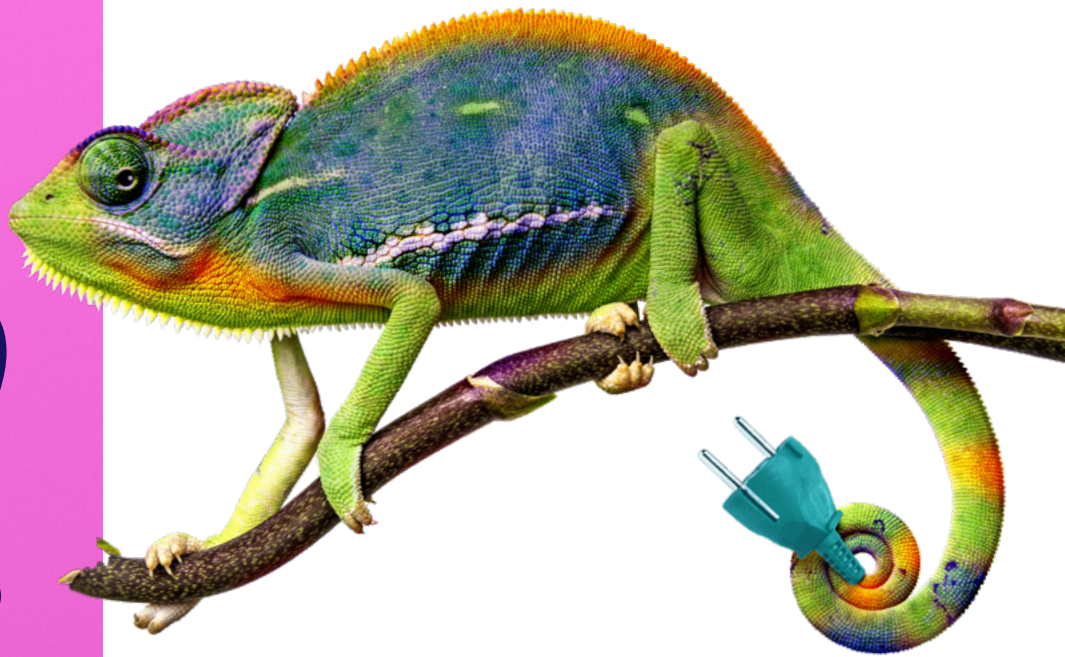


Notes Source: B3. What percentage breakdown is your performance vs branding budget? Base size (1000), Brand – What percentage breakdown will there be between your performance vs branding budgets in 18 months' time? Base size: all respondents (202)

65% OF ADVERTISING BUDGETS CURRENTLY SKEW TOWARDS PERFORMANCE SPEND



Defining the new landscape

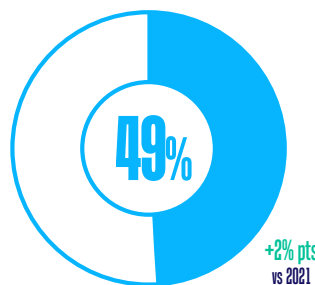


Expected demand for programmatic DOOH

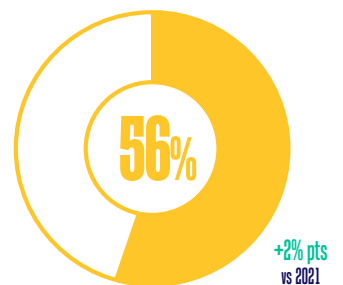
As outlined above, demand for programmatic DOOH is expected to continue to grow. Over half (56%) of campaigns in Australia (vs 57% globally) are expected to include programmatic DOOH over the next 18 months, according to Australian executives.

Proportion of campaigns executives have planned, bought or placed programmatic DOOH in the last / next 18 months?

9



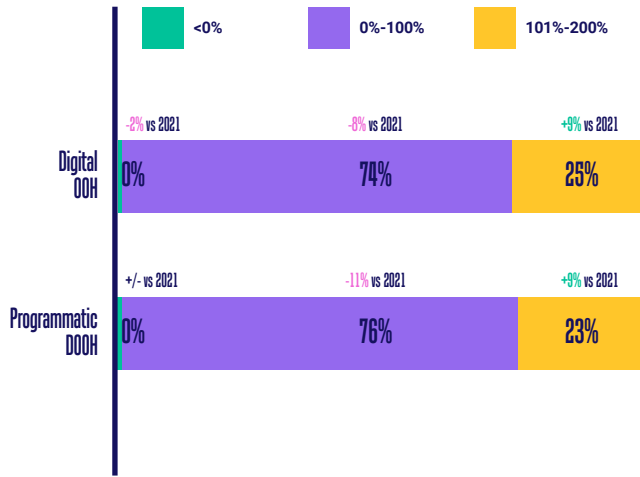
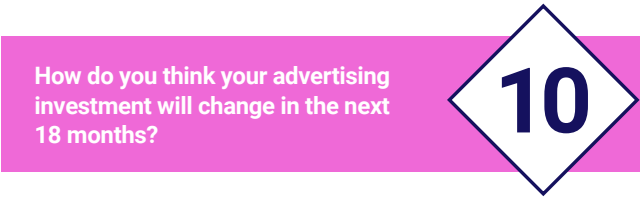
Last 18 months



Next 18 months

Notes: Source: C6. Think of the campaigns you've worked on in the past 18 months, for what proportion have you planned, bought, or placed programmatic DOOH advertising? / C7 Now think of the campaigns you'll be working on in the next 18 months, for what proportion do you think will you plan, buy, or place programmatic DOOH advertising? Base size: all respondents (202)

In addition, **23% (+9% pts vs 2021)** of executives in Australia believe that advertising investment in programmatic DOOH will more than double (101-200%) over the next 18 months (vs 19% globally).



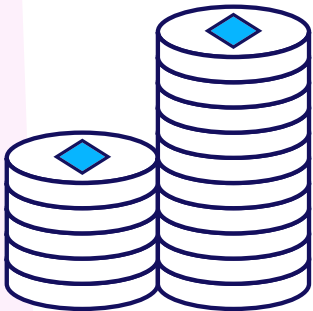
Notes: Source: B8. How do you think your advertising investment in the following media will change in the next 18 months?
Base size: all respondents (202)

Advertisers appreciate that this growth will come with a steep learning curve for some, and many are planning on investing heavily in the channel in order to go through a period of testing and learning, to evaluate where and how the channel can be most effective.



23%

OF EXECUTIVES IN AUSTRALIA BELIEVE THAT ADVERTISING INVESTMENT IN PROGRAMMATIC DOOH WILL MORE THAN DOUBLE (101-200%) OVER THE NEXT 18 MONTHS

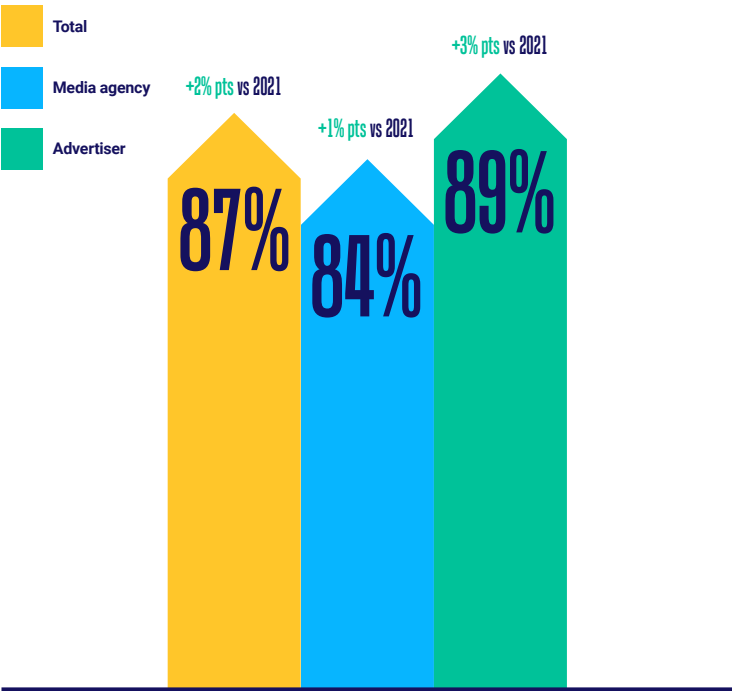


In-house investment

In line with the expected demand outlined above, 87% (+2% pts vs 2021) of media executives in Australia (vs 90% globally) say that they will invest in building programmatic DOOH expertise in-house over the next 18 months, with many hoping to grow programmatic DOOH teams and upskill programmatic and OOH desks.

Thinking about how you expect to place programmatic digital out-of-home advertising in the next 18 months, to what extent do you agree or disagree with the following statement?

11



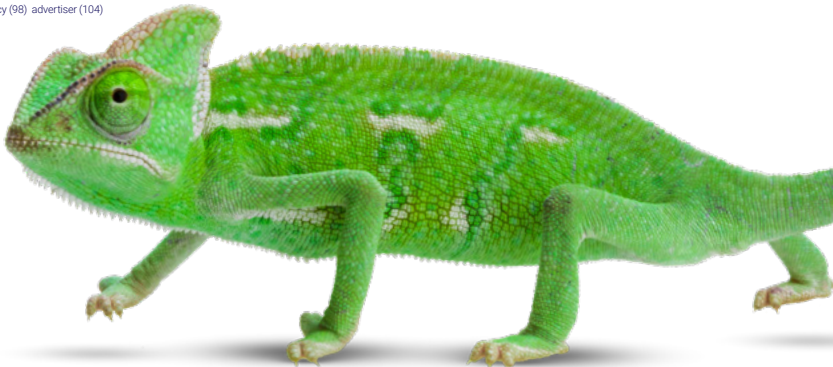
We will invest in building our programmatic digital Out-of-Home expertise

Notes: Source: C10. Thinking about how you expect to place programmatic digital out-of-home advertising in the next 18 months, to what extent do you agree or disagree with the following statement?
Base size: all respondents (202) agency (98) advertiser (104)

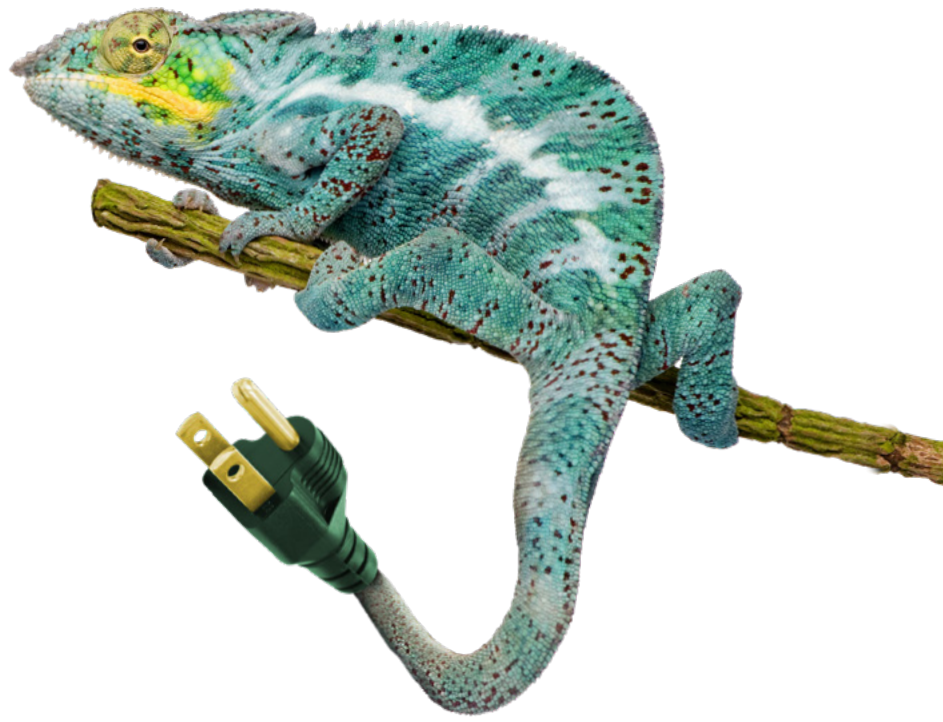


“We’ve invested in sophisticated technology, and data, but we want to push our use of the tech capabilities even further to deliver dynamic content optimisation, and we want to be more omni-channel in terms of our systems working together. We want it to be more seamless”

James Lambert
Head of Sightline, GroupM Australia



Overcoming barriers to adoption



1 More widespread understanding of programmatic DOOH

Given the alignment in planning and buying of programmatic DOOH alongside other programmatic activity, it is no surprise that investment in widespread education will unlock further spend in the channel by helping advertisers to better understand the key benefits of programmatic DOOH and enabling them, in turn, to communicate those benefits to clients and teams.

Central to this education piece is providing information on how to measure the ROI of programmatic DOOH campaigns, and how to attribute programmatic DOOH within an omnichannel campaign. **52% of Australian agency executives (vs 37% globally) feel that information on cross-channel measurement and attribution** would help them to better understand the channel, and 42% of Australian advertising executives (vs 42% globally) said that they would like to know more about how to accurately measure the ROI of their programmatic DOOH campaigns.

As a sign of the channel's evolution, in 2021 media executives in Australia wanted standards in programmatic DOOH to be clearly articulated (ranked #1 in 2021, ranked #6 in 2022) and expressed a desire for training on the benefits of programmatic DOOH (ranked #2 in 2021, ranked #4 in 2022). However, in 2022, executives in Australia seem to be less concerned with these foundational considerations and more focused on ensuring that programmatic DOOH is correctly attributed on multi-channel plans.



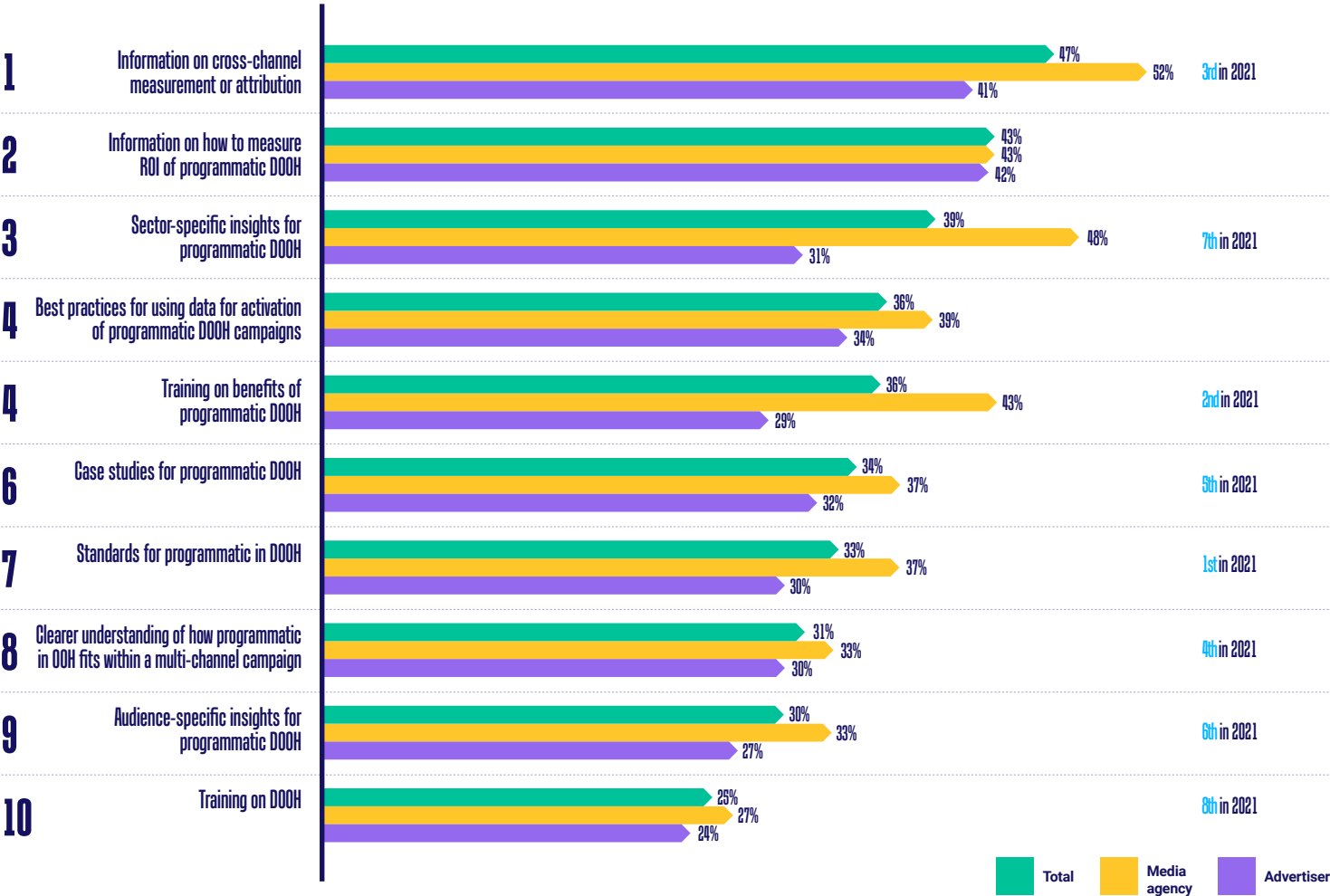
“Education is important, and it’s not just about the tech. Digital specialists and traditional OOH specialists will have a different view on programmatic DOOH and where it sits, so it’s about making sure everyone gets on the same page and collaborates”

James Lambert
Head of Sightline, GroupM Australia

Which, out of the following, would help you learn more about programmatic DOOH advertising?

NB. Unless otherwise indicated, rankings stayed the same as last year

12



Notes: Source: D4. Which, out of the following, would help you learn more about programmatic DOOH advertising?
Base size: all respondents (202) agency (98) advertiser (104)



2 Measurement and Case Studies

To complement education on the benefits of programmatic DOOH, advertisers and agency executives would like to see media owners producing more case studies with measurable results. Many feel they could do a better job of communicating the effectiveness of programmatic DOOH to clients and colleagues if they had a set of widely accepted, robust metrics and case studies that celebrated key successes as well as detailing the ROI achieved and impact on key KPIs.

Cross-channel attribution is a pervasive issue across all media types and is not a challenge specific to programmatic DOOH. As highlighted in Exhibit 12, 47% of Australian media professionals surveyed would like more information on cross-channel measurement and attribution in order to demonstrate programmatic DOOH's impact within an omni-channel campaign.



"The market is there and the appetite is there, but a good, sophisticated attribution model would be really valuable"

Sam Buchanan
CEO, Independent Media Agencies Australia

3 Precision targeting and real-time audience data



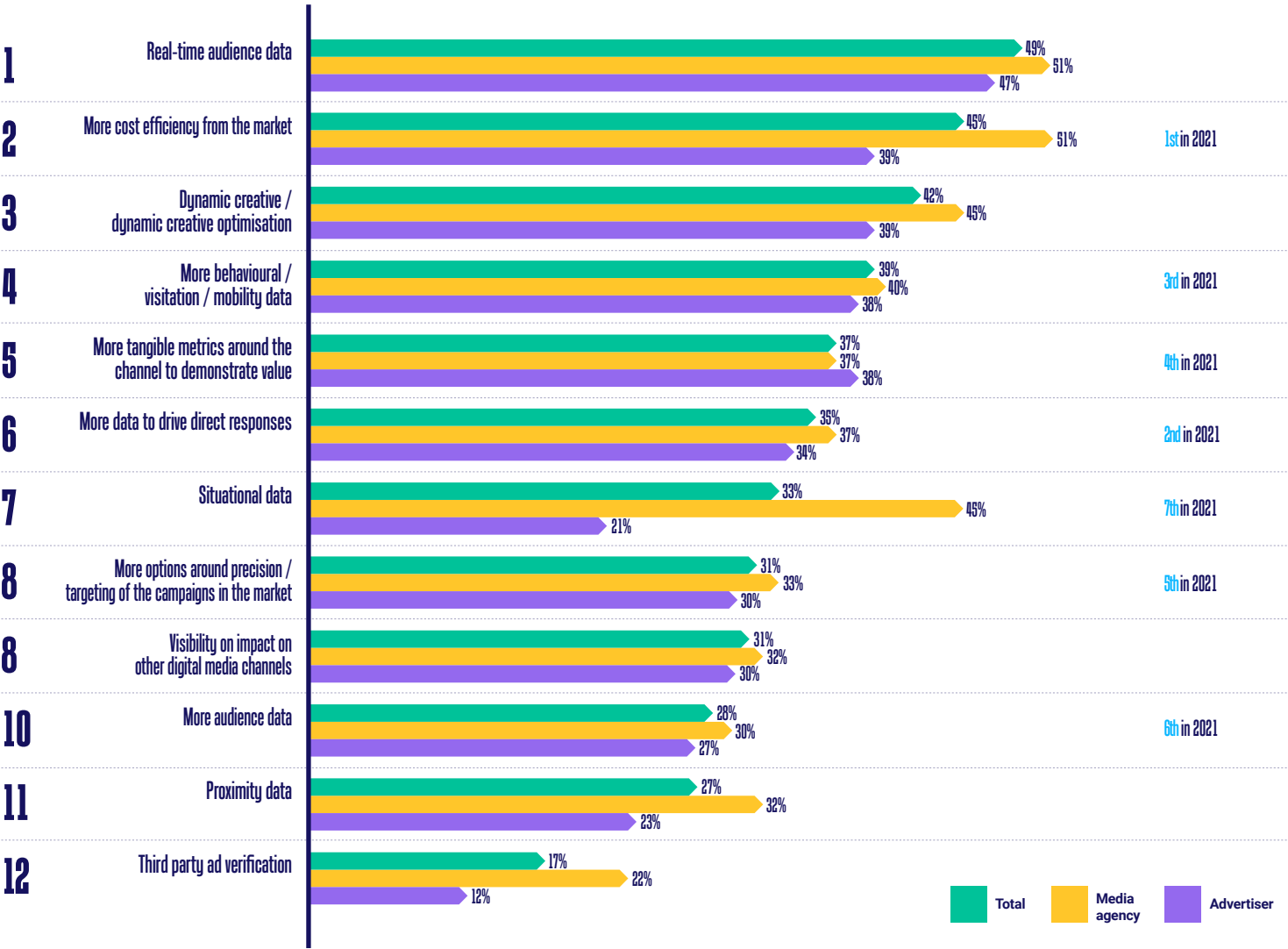
This year, media professionals in Australia and globally identified the provision of real-time data (ranked #1 in Australia and globally) as key to improving the value of, and boosting investment in, programmatic DOOH.

Given Australia's relative infancy (compared with the other markets surveyed) when it comes to programmatic DOOH, it is no surprise that 45% of media executives in Australia would also like to see more cost efficiency from the Australian market, and greater use of the dynamic creative opportunities available through programmatic DOOH (42%).

Which of the following would you like to see in order to give programmatic digital out-of-home campaigns more value and make you invest more?

NR. Unless otherwise indicated, rankings stayed the same as last year

13

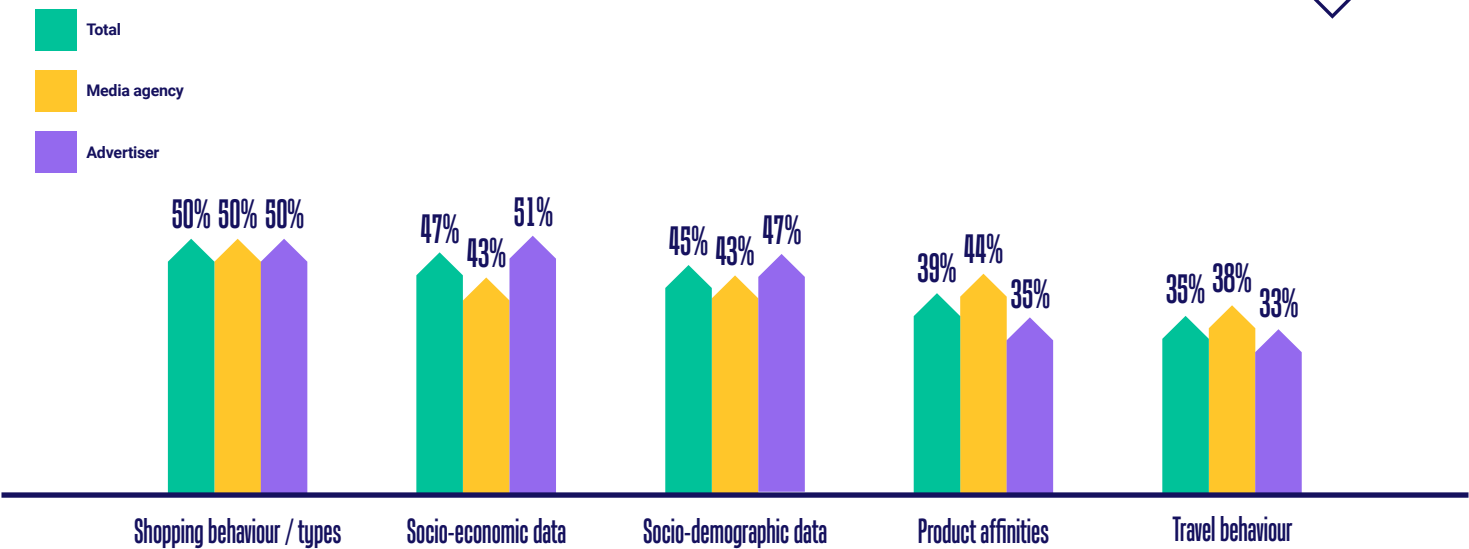


Notes: Source: C6. Which of the following would you like to see in order to give programmatic DOOH campaigns more value and make you invest more?
Base size all respondents (202) agency (98) advertiser (104)

In terms of types of audience data that advertisers perceive to be most valuable, media executives in Australia and globally say that shopping behaviour (50% in Australia vs 54% globally) and socio-economic (47% in Australia vs 53% globally) data are the most useful data sets to employ in the targeting of programmatic DOOH campaigns.

Which of the following types of audience data would be most useful in targeting programmatic digital out-of-home campaigns?

14



Notes: Source: C6.1. Which of the following types of audience data would be most useful in targeting programmatic DOOH campaigns?
Base size all respondents (202) agency (96) advertiser (104)



“Real-time audience data to enable dynamic creative optimisation is massively important”

James Lambert
Head of Sightline, GroupM Australia

50%

OF AUSTRALIAN MEDIA EXECUTIVES SAY THAT SHOPPING BEHAVIOUR IS THE MOST USEFUL AUDIENCE TARGETING DATA

Summary



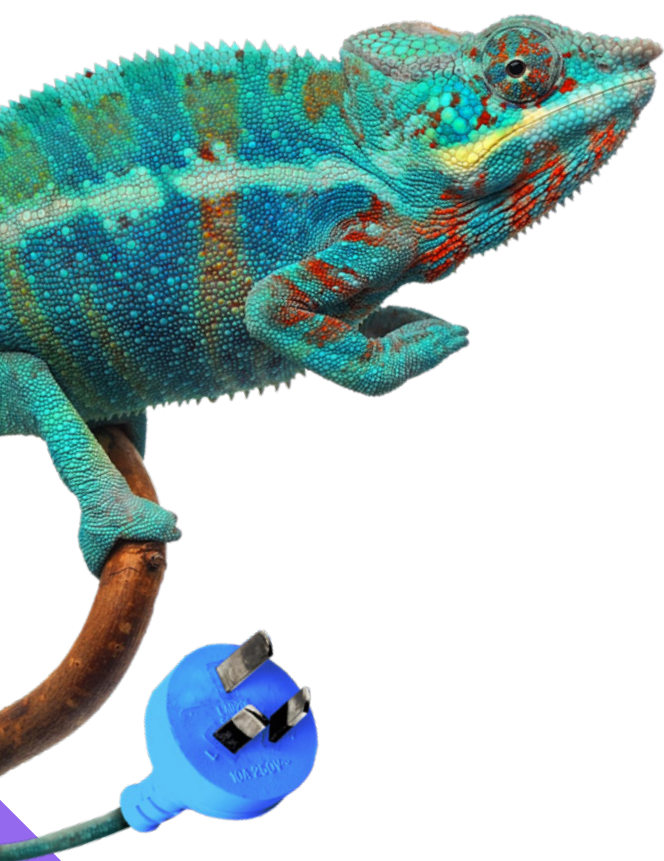
The results of these surveys from over 1000 media executives globally are clear, showing that the future for programmatic DOOH looks bright. With nearly all (99%) Australian media professionals (vs 94% globally) surveyed set to retain or increase investment in the channel, demand is expected to continue, and grow, over the next 18 months.

In response to the predicted surge in demand from clients across all sectors, Australian media executives will continue to invest in building in-house programmatic DOOH expertise, focusing on educating programmatic, OOH and cross-media planning teams on the advantages of programmatic DOOH so that benefits can be clearly communicated to clients.

Whilst the COVID-19 pandemic proved the value of the agility that programmatic DOOH offers, many Australian advertisers have continued to take advantage of this flexibility post-pandemic. Furthermore, the ability to pivot and switch on/off programmatic DOOH campaigns as required is likely to become even more compelling as the world navigates new norms in working and socialising habits, and a potentially precarious economic outlook.

The ability to target out-of-home audiences with laser precision is likely to persist as a key driver of programmatic DOOH adoption in Australia, with the potential to overlay real-time audience data to inform activation, an exciting prospect for many.

Programmatic DOOH is sure to take its place as a mainstay on programmatic campaigns



As advertisers in Australia pursue an omni-channel approach to planning and executing programmatic activity, programmatic DOOH is sure to take its place as a mainstay on programmatic campaigns.

Those that are newer to the channel may take more of a test and learn approach, discovering the synergy that programmatic DOOH has with other digital channels such as social media and digital video. Advertisers that have consistently invested in programmatic DOOH will continue to reap the benefits of the channel's hybrid broadcast/digital capabilities and its ability to drive both brand and performance outcomes.

Finally, in order to unlock the full potential of programmatic DOOH, it is becoming increasingly important to offer robust ROI and measurement solutions. As planning programmatic DOOH alongside other channels becomes standard practice, the ability to accurately measure its impact within a multi-channel campaign is likely to become a determining factor in the growth of the channel. Moreover, the provision of case studies with measurable outcomes will arm Australian media executives with concrete evidence that will help them to showcase the value of programmatic DOOH.