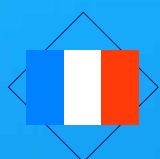




# State of the Nation

**Programmatic DOOH 2022**

France Whitepaper



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# Executive summary



**In June 2022, VIOOH partnered with MTM to survey 1,000 agency and advertising executives across France, the US, UK, Germany, and Australia 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 France, 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 OOH programmatically enables flexibility to respond to changing consumer behaviour and contexts, demand for programmatic DOOH has increased from advertisers across all sectors, with French media executives reporting increases in both the number of advertisers investing in the channel, as well as the amount of budget invested.

French 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. Nearly a third of French media executives surveyed have predicted that this duality is likely to drive spend increases in the channel over the near-term.

Executives in France appreciate the contextual relevance that programmatic DOOH enables, highlighting the ability to employ a variety of different data sources to deliver the right message to the right audience at the right time as a key strength of the channel. For this reason, French executives have expressed their keenness to access real-time audience data to further refine and improve the value of programmatic DOOH campaigns.

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 direct-bought digital OOH the most popular channels for media executives in France to pair it with.

Within this context, French media executives have pointed to the importance of educating both advertisers and clients on how programmatic DOOH fits within multi-channel campaigns and sharing best practices on data activation.

In line with executives globally, French media executives also recognise the need for robust, unified measurement solutions in articulating the value of programmatic DOOH and isolating its effect within multi-channel campaigns. Similarly, French media executives emphasise that the provision of case studies with clear, measurable outcomes will help 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 France expected to include programmatic DOOH and French 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 French 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 France, the UK, USA, Germany, and Australia 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).



## ***Programmatic DOOH is a really fast-growing channel... and we see that all sectors are interested in it***

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 France, half (50%) of media executives surveyed have planned, bought or placed programmatic DOOH in the last 12 months (vs 46% globally).**

**50%** IN THE LAST 12 MONTHS, HALF OF CAMPAIGNS IN FRANCE 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).



***"After the COVID period, clients understand that they need to switch to a digital model"***

**Kaoutar Benazzi**  
Chief Programmatic Officer, Havas France

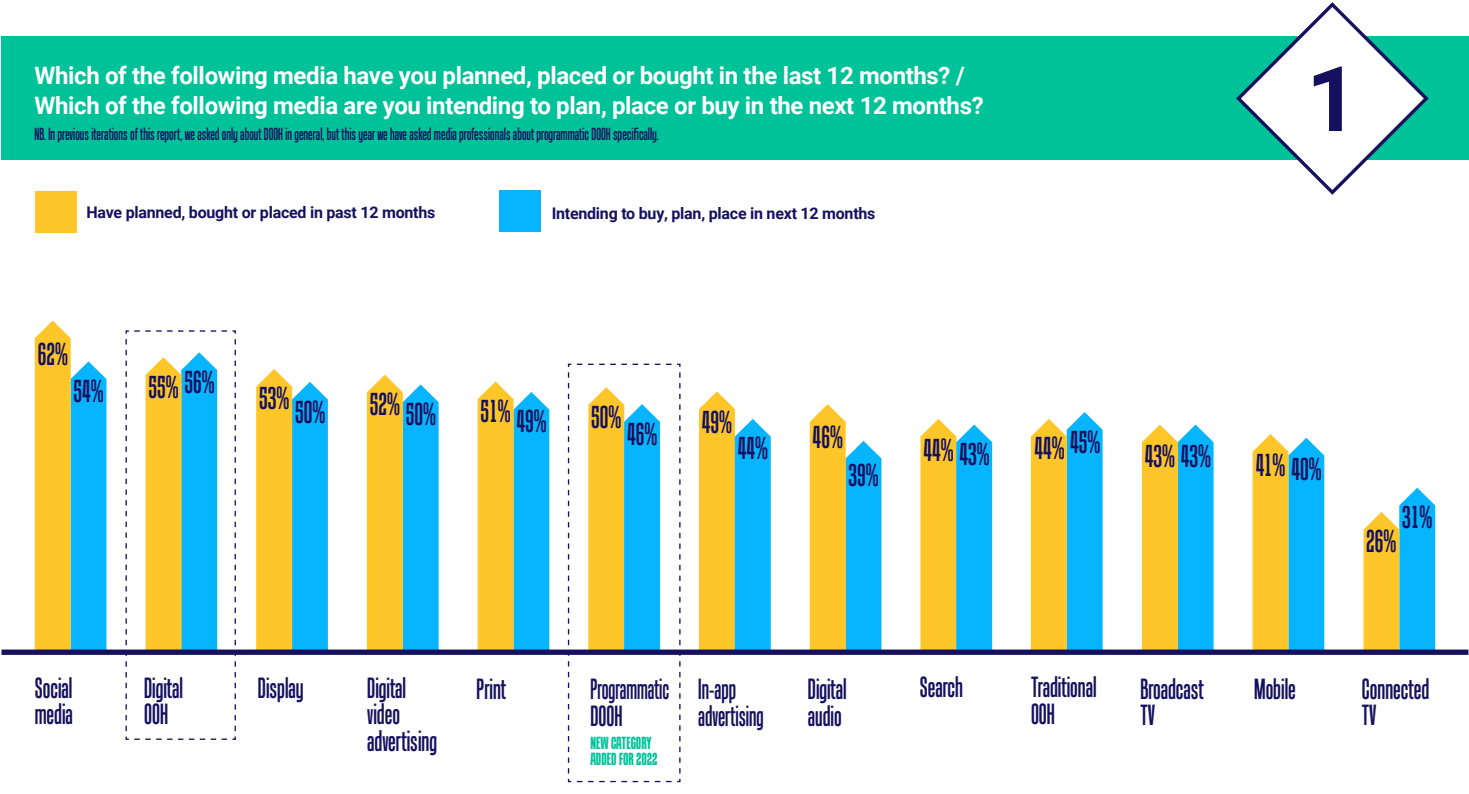
***"Programmatic DOOH is a really fast-growing channel... and we see that all sectors are interested in it. For example tourism, with OOH we can show strong images of destinations. Also for banking, health and insurance sectors, they need to showcase their brand and have a strong image, [and] OOH is great for that"***

**Laurent Ferreira**  
Chief Publicity Officer, Groupe Sud Ouest, France



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).

In France, almost half (49%) of campaigns (+2% pts vs 2021) have included programmatic DOOH in the last 18 months (vs 51% globally), and demand is expected to continue to remain strong, with 56% of campaigns set to involve programmatic DOOH (-1% pt vs 2021) in the next 18 months (vs 57% globally). In addition, French media executives plan to increase their investment in digital OOH, with **56% intending to buy, plan or place digital OOH (vs 50% globally) in the next 12 months (+1% pt vs planned, placed or bought over last 12 months).**



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 (208)





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. **30% of French media professionals say they have added new budgets to programmatic DOOH (vs 37% globally), whilst 16% have moved budget from other traditional channels (vs 21% globally), and 14% have converted 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

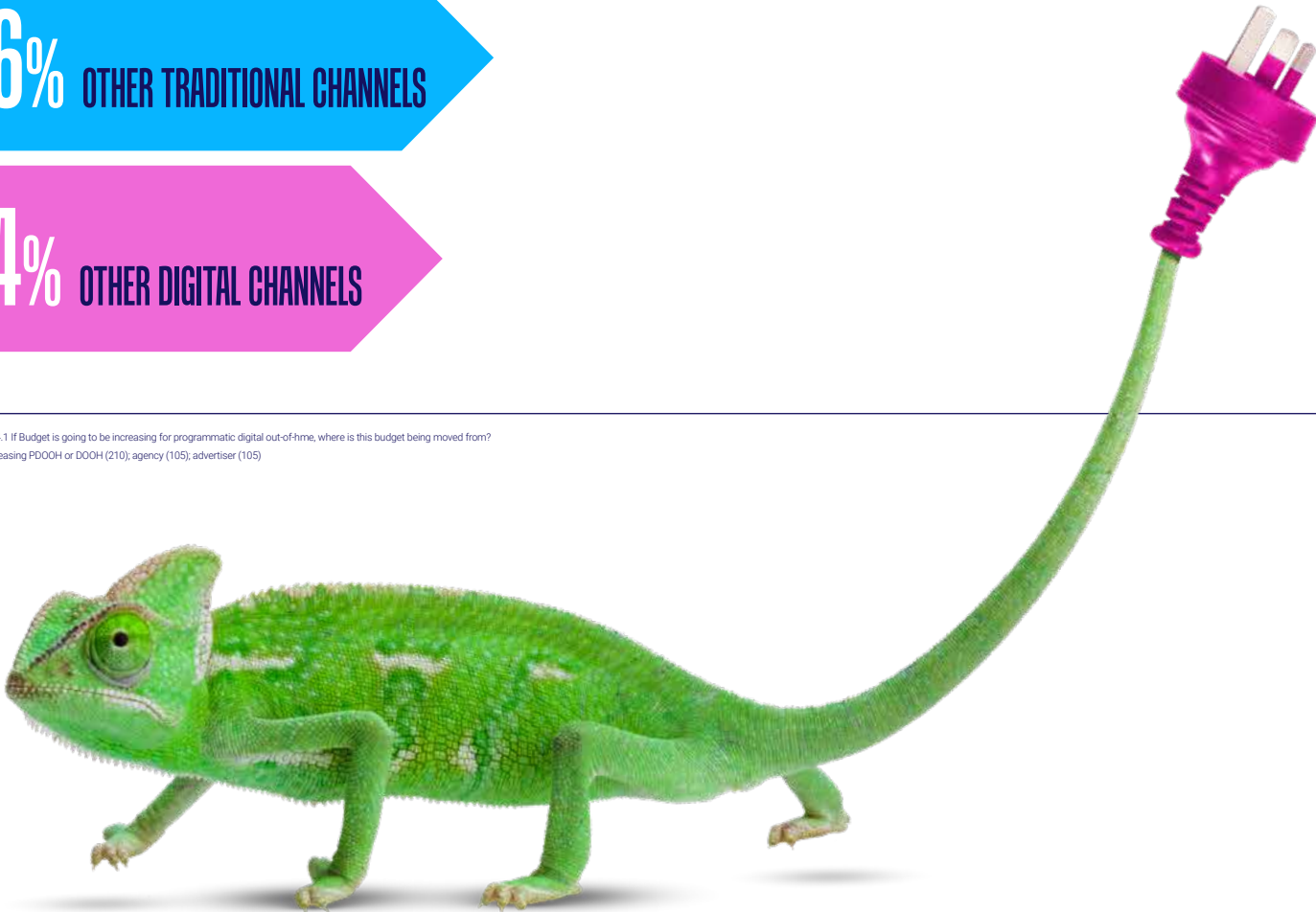
53% TRADITIONAL OOH

30% NEW BUDGET ADDED

16% OTHER TRADITIONAL CHANNELS

14% OTHER DIGITAL CHANNELS

Notes: Source C4.1 If Budget is going to be increasing for programmatic digital out-of-hme, where is this budget being moved from?  
Base size: all increasing PDOOH or DOOH (210); agency (105); advertiser (105)





# Drivers of programmatic DOOH adoption

Programmatic DOOH delivers a range of benefits for advertisers.

French advertisers greatly value the duality of programmatic DOOH to be both a broadcast and a direct response channel, as required. **Almost a third (31%) of media executives (vs 28% globally) in France believe that this hybridity will be the primary driver (ranked #1 in France and joint #1 globally) of spend increases in the channel over the next 18 months.**

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. 29% of French media executives (vs 27% globally) identified contextual relevance as one of the main reasons (ranked #2 in France and joint #2 globally) that they will increase spend in programmatic DOOH over the next 18 months.



*"There are three main advantages: the first is the dynamic aspect of it [pivot quickly], second aspect is about targeting and data use, it's very effective, we can surgically target different regions, the third is the ability to deliver a message dynamically in real time. We are also able to use films and animations that bring in the audience and really engage them"*

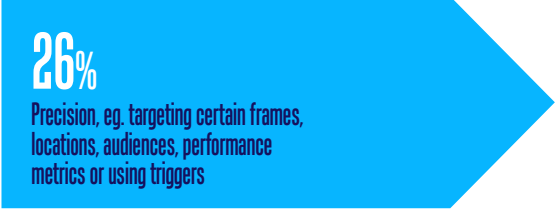
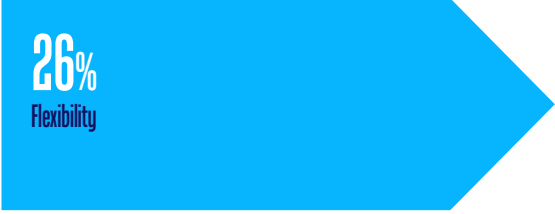
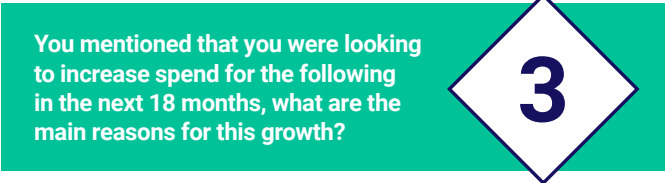
Laurent Ferreira  
Chief Publicity Officer, Groupe Sud Ouest, France

*"You can activate a campaign last minute and optimise or put it on standby, this is something we do frequently. With programmatic [DOOH] you can target only the screen that you want and in the time that you want. You have the agility and flexibility to make decisions quite quickly"*

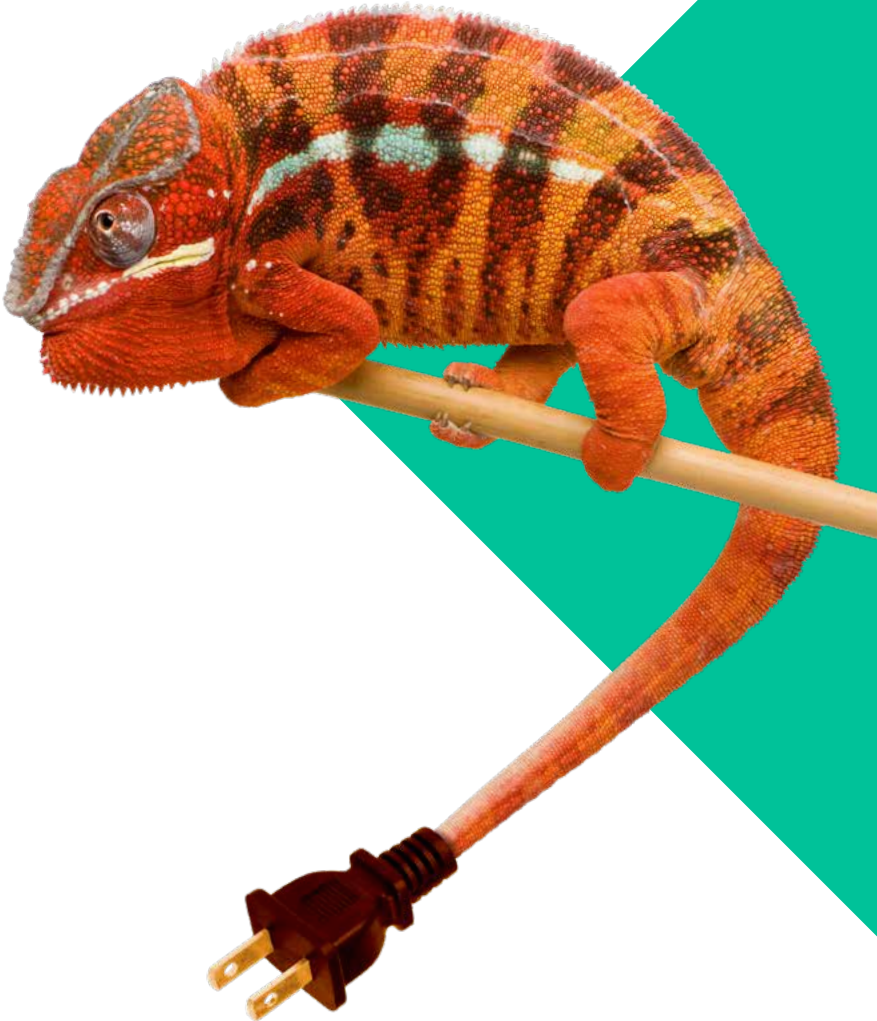
Kaoutar Benazzi  
Chief Programmatic Officer, Havas France

More broadly, 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. **French media executives (26%) have identified this flexibility as a key factor (ranked jointly #3 in France, ranked higher than jointly #4 globally) that will influence increases in spend over the next 18 months.**

In addition, 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.



**You have the agility and flexibility to make decisions quite quickly**



**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 (203)

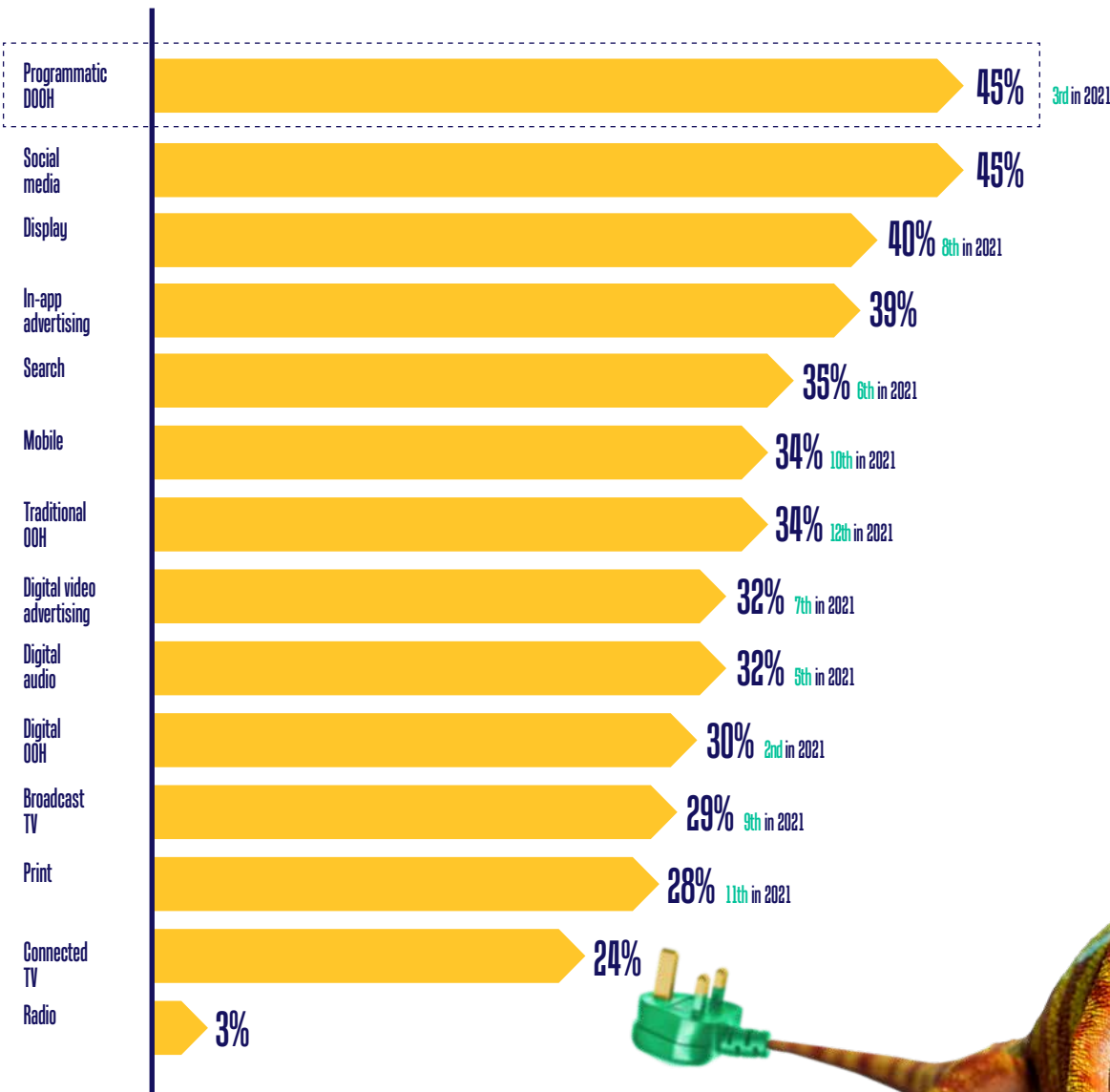
Moreover, advancements in the technical capabilities of programmatic DOOH continue to deliver new and innovative opportunities for advertisers to reach and engage with audiences. For example, advertisers are taking advantage of the ability to use dynamic creative (e.g. 3-D, video, etc.) to deliver relevant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

As a result, it's no surprise that this year French executives selected programmatic DOOH (45% in France, 40% globally) as one of the top two media channels developing the most innovative opportunities for advertisers (ranked joint #1 in 2022 vs ranked #3 in 2021).

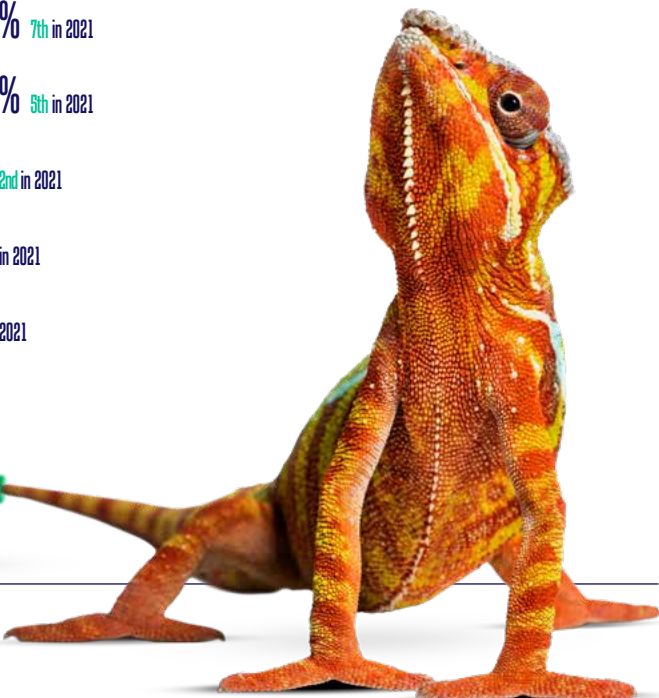
Which of these media are developing the most innovative opportunities for advertisers?

NB: 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 5) 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 (210)





# Programmatic DOOH as part of the omni-channel media mix



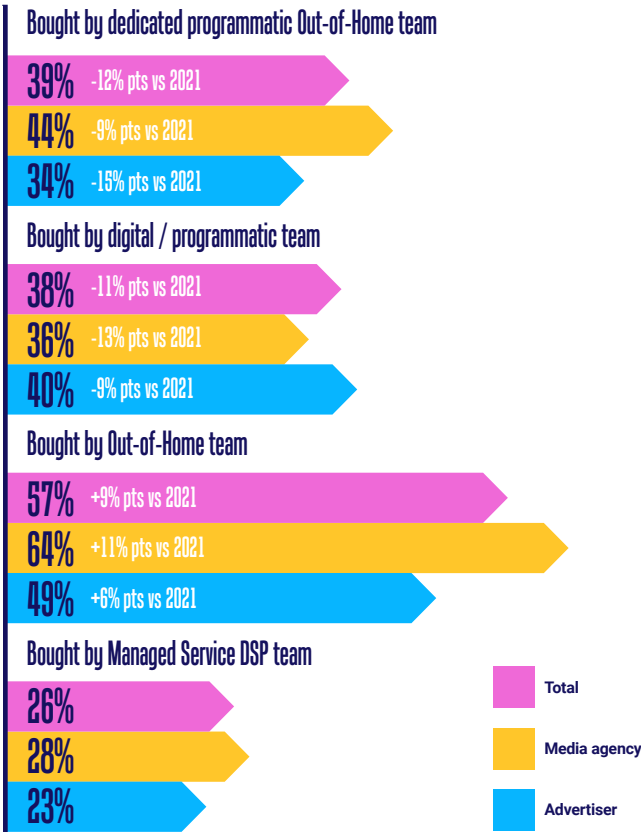
Globally, it is standard practice for advertisers to take an omni-channel approach when planning and buying programmatic campaigns, and this is now extending to include digital out-of-home.

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 and off different channel activations as needed. Programmatic OOH tends to be bought by OOH teams in France, and this has **increased vs 2021 according to French media executives (+9% pts)**. This trend towards buying through OOH teams is not reflected in other markets, where programmatic OOH is increasingly bought by digital and programmatic teams (+5% pts globally).

However, it is worth noting that many French media agencies are still transitioning away from the traditional agency structure (ie. separate desks for each media type) towards more integrated omni-channel planning desks, and as a result, many channel planning desks are still operating in silos.

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)



*"Today, our agencies propose 360° solutions for client needs, so an omni-channel approach. We find that a complete solution with repetition of message across many customer touchpoints is most effective"*

Laurent Ferreira  
Chief Publicity Officer, Groupe Sud Ouest, France

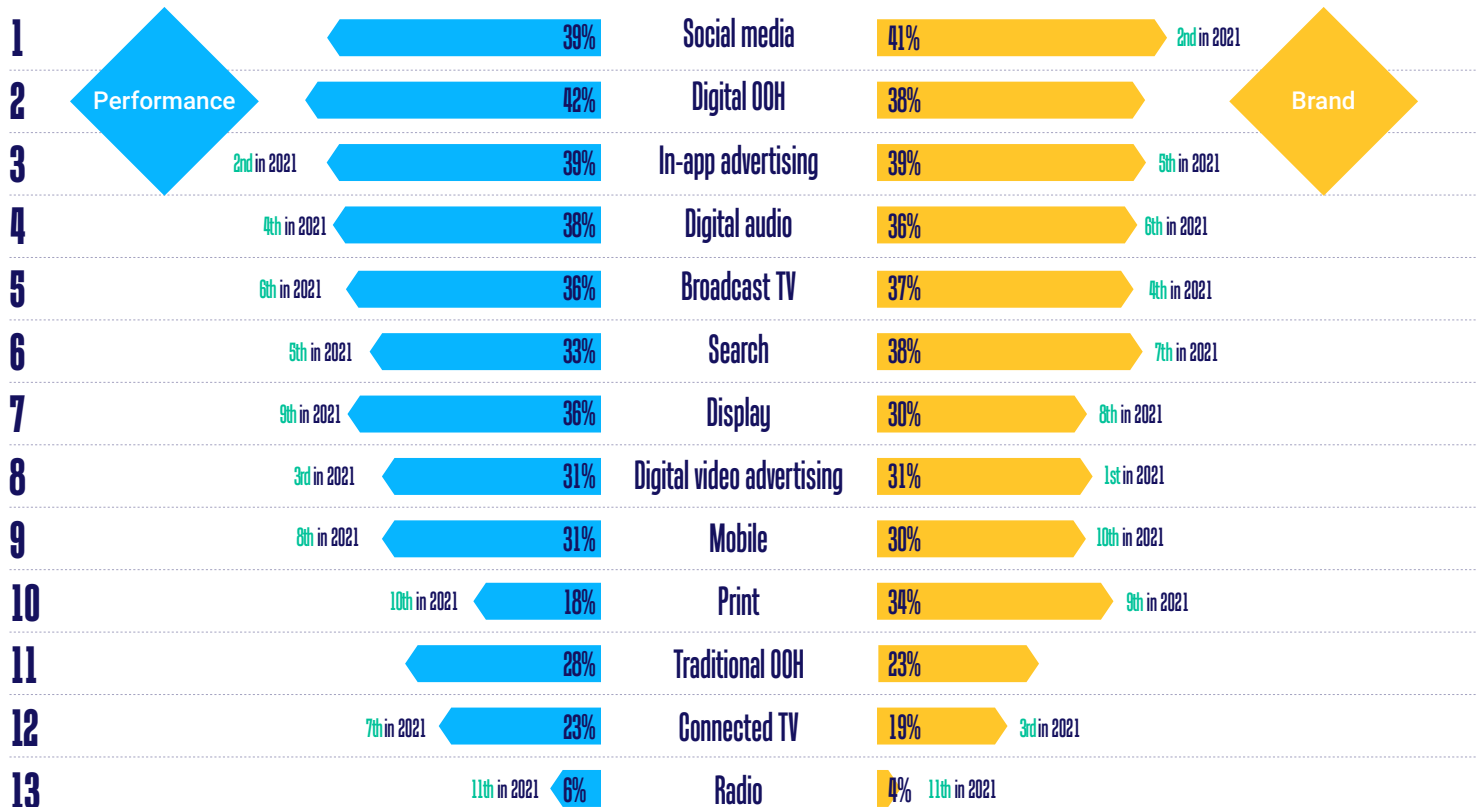
In line with our global findings, channels that can be bought programmatically remain the most popular channels to run alongside programmatic DOOH, with French executives selecting social media as the most likely pairing for brand-led campaigns (41% in France vs 51% globally), and digital OOH for performance focused campaigns (42% in France vs 40% globally).

Furthermore, 26% of executives in France (and 26% globally) believe that the ability to **easily align programmatic DOOH with other programmatic channels** will be one of the key drivers (ranked jointly #3 in France, ranked jointly #3 globally) for increases in spend over the next 18 months.

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

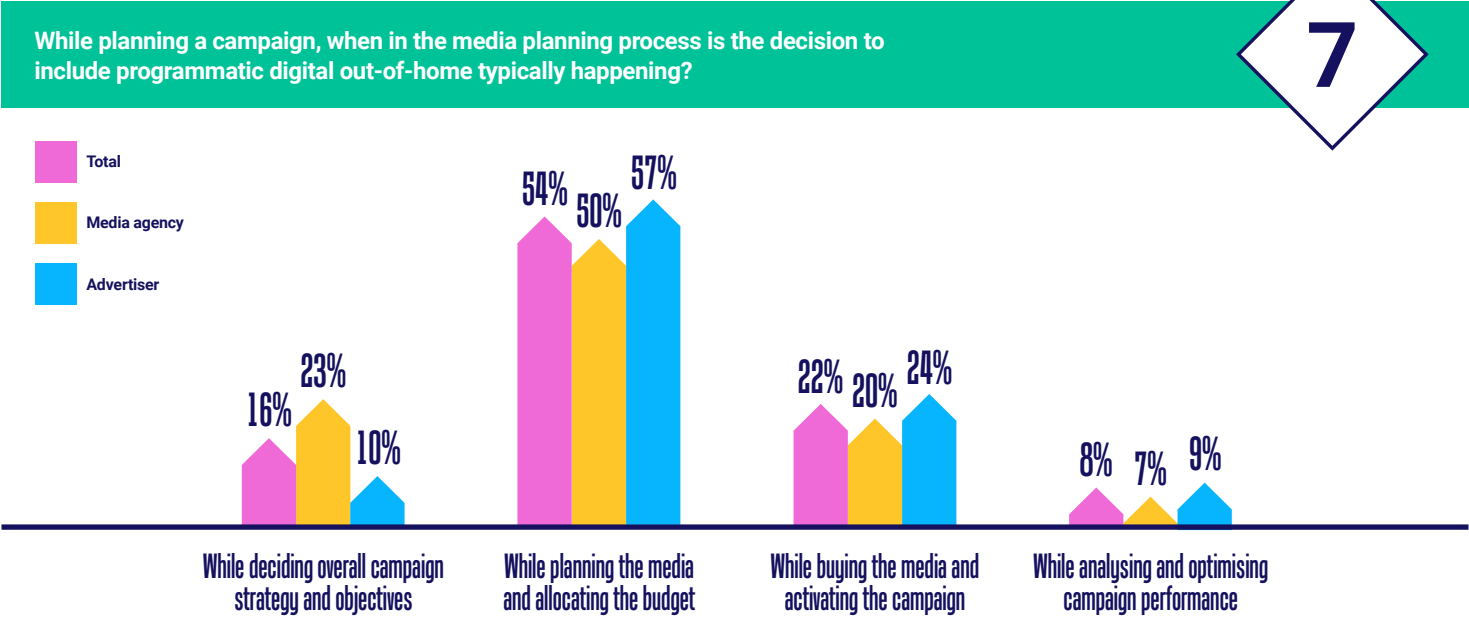
NR: Unless otherwise indicated, rankings stayed the same as last year

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 (208)

Demonstrating the importance of an omni-channel strategy, nearly three quarters (70%) of French media professionals (vs 74% globally) make the decision to include programmatic DOOH during the early stages of the campaign strategy and planning process. **In line with global findings, most (54%) decide to include it while planning the media and allocation of budgets (vs 49% globally).**



**Notes** Source: CB. 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 (208) agency (105) advertiser (103)



**3/4**

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

# 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.



***"There is no distinction, we use programmatic DOOH for both brand and performance, just like digital"***

**Kaoutar Benazzi**  
Chief Programmatic Officer, Havas France

***"In our region, there is a huge focus on branding. We work with local clients that expect ROI and commercial performance, which is to drive sales. So, we use programmatic DOOH for both, for brand and for driving to the store"***

**Laurent Ferreira**  
Chief Publicity Officer, Groupe Sud Ouest, France





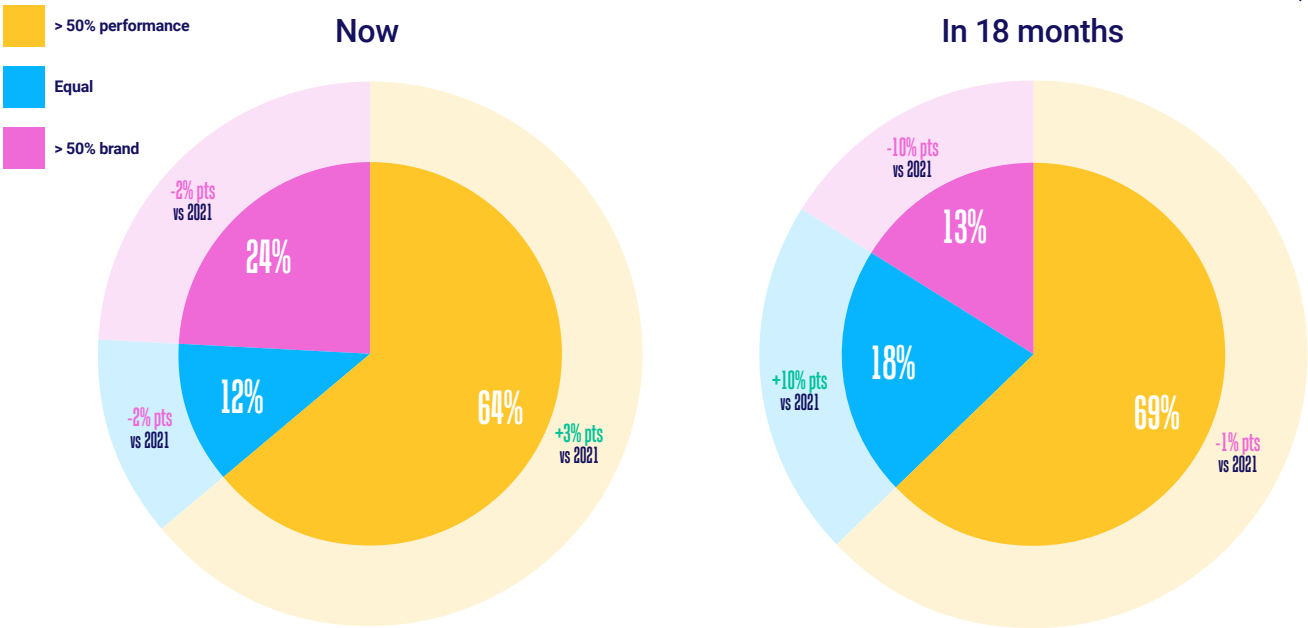


# There is no distinction, we use programmatic DOOH for both brand and performance

Whilst allocation of performance and brand spend on programmatic DOOH is done on a case-by-case basis, more broadly, advertising budgets in France and globally currently skew towards performance spend (64% in France, 59% globally). **This is expected to continue into 2023, with performance focused campaigns predicted to take the lion's share of budget** (69% in France, 63% globally) in France and around the globe, perhaps unsurprisingly given current uncertainties around the broader economic outlook.

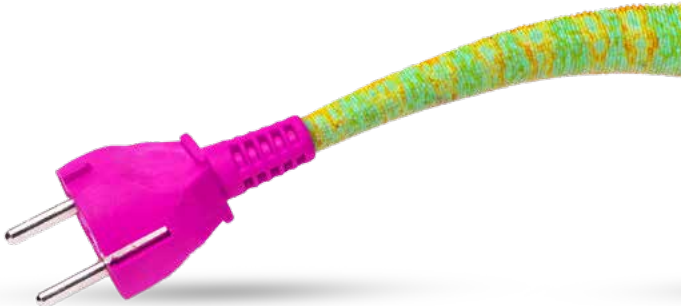
What percentage breakdown is your performance vs branding budgets now / in 18 months time?

8

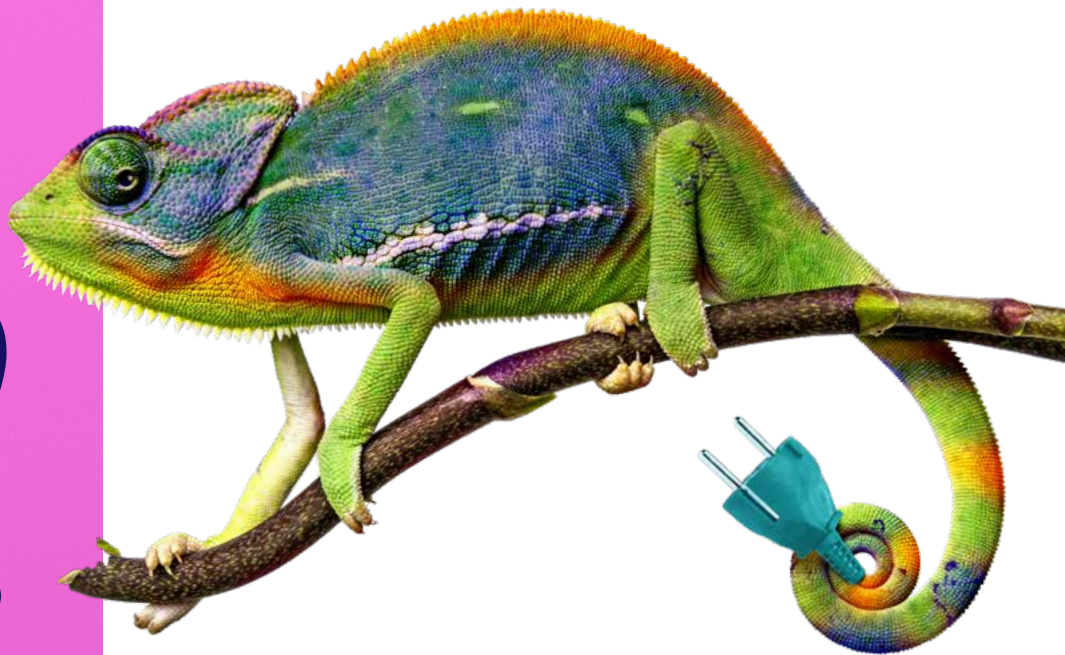


Notes Source: B3. What percentage breakdown is your performance vs branding budget? Base size (1000), Brand – What percentage breakdown will there be between your performance vs branding budgets in 18 months' time? Base size: all respondents (208)

64% OF ADVERTISING BUDGETS CURRENTLY SKEW TOWARDS PERFORMANCE SPEND



# Defining the new landscape

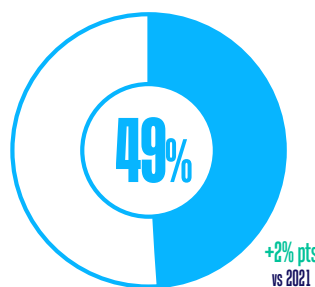


## Expected demand for programmatic DOOH

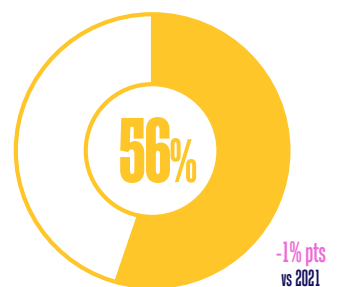
As outlined above, demand for programmatic DOOH is expected to continue to grow. Nearly three fifths (56%) of campaigns (-1% pt vs 2021) in France are expected to include programmatic DOOH over the next 18 months (vs 57% globally), according to executives.

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

9



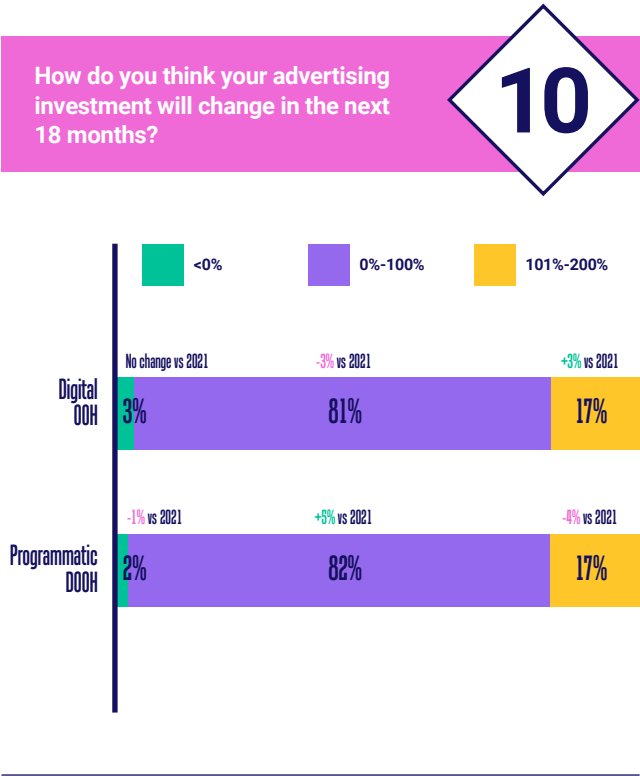
Last 18 months



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 you will plan, buy, or place programmatic DOOH advertising? Base size: all respondents (210)

In addition, **17% of French executives believe that advertising investment in programmatic DOOH (-4% pts vs 2021) and digital OOH (+3% pts vs 2021) respectively will more than double (101-200%) over the next 18 months.**



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 (208)

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.

*"I think we're going to go through a period where we want to take risks to test and learn in order to understand it fully. In order to educate clients about the benefits, we need to begin with test and activation"*

Kaoutar Benazzi  
Chief Programmatic Officer, Havas France



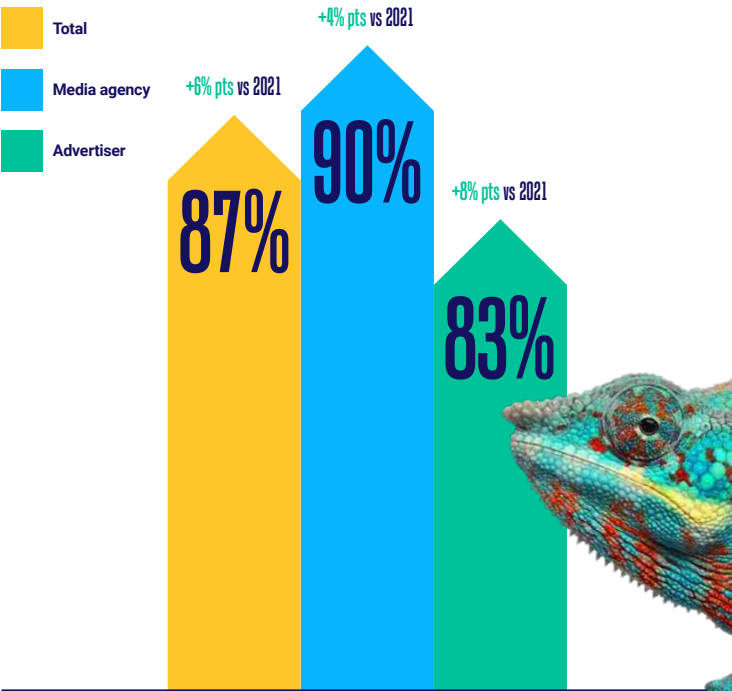
**17%** OF EXECUTIVES IN FRANCE BELIEVE THAT ADVERTISING INVESTMENT IN PROGRAMMATIC DOOH WILL MORE THAN DOUBLE (101-200%) OVER THE NEXT 18 MONTHS

# In-house investment

In line with the expected demand outlined above, 87% of French media executives (vs 90% globally) say that they will invest in building programmatic DOOH expertise in-house over the next 18 months (+6% pts vs 2021), 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 (208) agency (105) advertiser (103)

"Today our company has 2-3 people who are specialised in programmatic DOOH, but we are looking for the team to grow in the next 12 months"

Laurent Ferreira  
Chief Publicity Officer, Groupe Sud Ouest, France





# Overcoming barriers to adoption



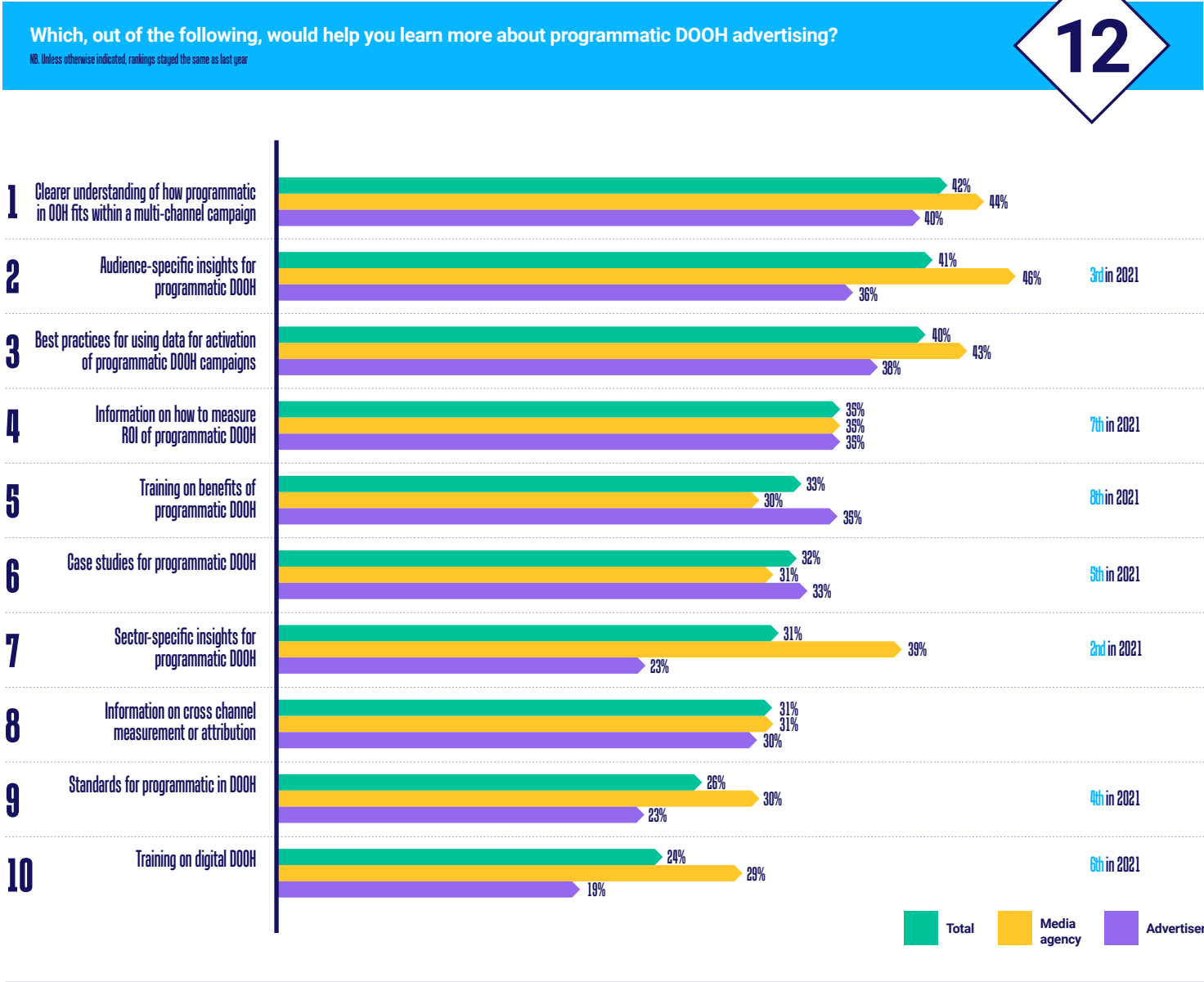
## 1 More widespread understanding of programmatic DOOH

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 sharing best practices in data activation and providing information on how programmatic DOOH fits within a multi-channel campaign. French media executives have highlighted the importance of understanding programmatic DOOH's role within an omni-channel campaign, and have ranked this higher than executives globally, with 44% of French agency executives and 40% of French advertising executives wanting a clearer understanding vs 39% of agency executives and 34% of advertising executives globally.

In line with media executives globally, French executives have pointed to the importance of getting best practices on using data in programmatic DOOH campaigns. However, this is ranked lower by French executives than executives globally (ranked #1 globally vs #3 in France), with **43% of French agency executives prioritising best practices for data activation vs 45% of agency executives globally**. French advertising executives mirror global advertising executives in their desire for data best practices, with 38% respectively selecting it as a key priority.

Additionally, agency executives in particular (46% of agency executives in France vs 40% of agency executives globally) have indicated that they are looking for audience specific insights (ranked #1 by agency executives in France, ranked #3 by agency executives globally) to inform their understanding of programmatic DOOH advertising.



Notes: Source: D4. Which, out of the following, would help you learn more about programmatic DOOH advertising?  
Base size all respondents (208) agency (105) advertiser (103)





## 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, 31% of French agency executives and 30% of French advertising executives would like more information on cross-channel measurement and attribution (vs 37% of agency executives and 40% of advertising executives globally) in order to demonstrate programmatic DOOH's impact within an omni-channel campaign.



***“Have more case studies, more proofs of concept, and more measurements to prove the impact on branding and performance. CPMs on programmatic DOOH are higher than on other mediums, so we need those studies to show its impact”***

**Kaoutar Benazzi**  
Chief Programmatic Officer, Havas France

***“We need more sophisticated and aligned measurement. We are working across several types of screens, with different publishers and methodologies; it's hard to implement a concrete method to analyse the audience for the client”***

**Kaoutar Benazzi**  
Chief Programmatic Officer, Havas France

# 3 Precision targeting and real-time audience data



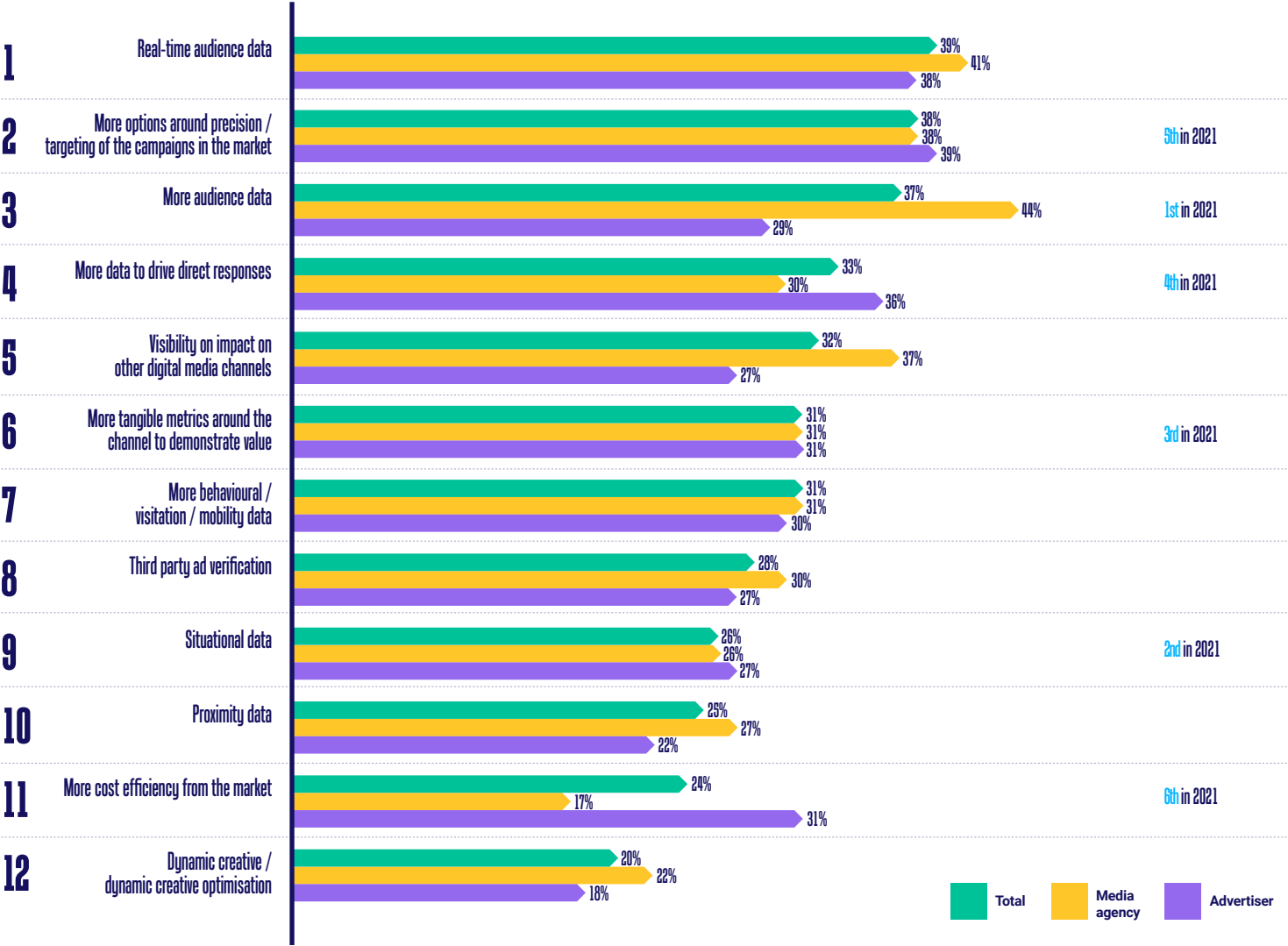
This year, media professionals in France and globally identified the provision of real-time data (ranked #1 in France and globally) as key to improving the value of, and boosting investment in, programmatic DOOH.

In light of the increasing alignment of programmatic DOOH with other programmatic digital channels, it is unsurprising that brands are also keen to get their hands on as much data as possible in order to build out multi-layered audience segments and improve the targeting of campaigns. Thus, 38% of executives in France (and 38% globally) believe that additional targeting options plus a wider scope of audience data (37% in France vs 39% globally) would give programmatic DOOH more value and prompt an increase in investment.

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

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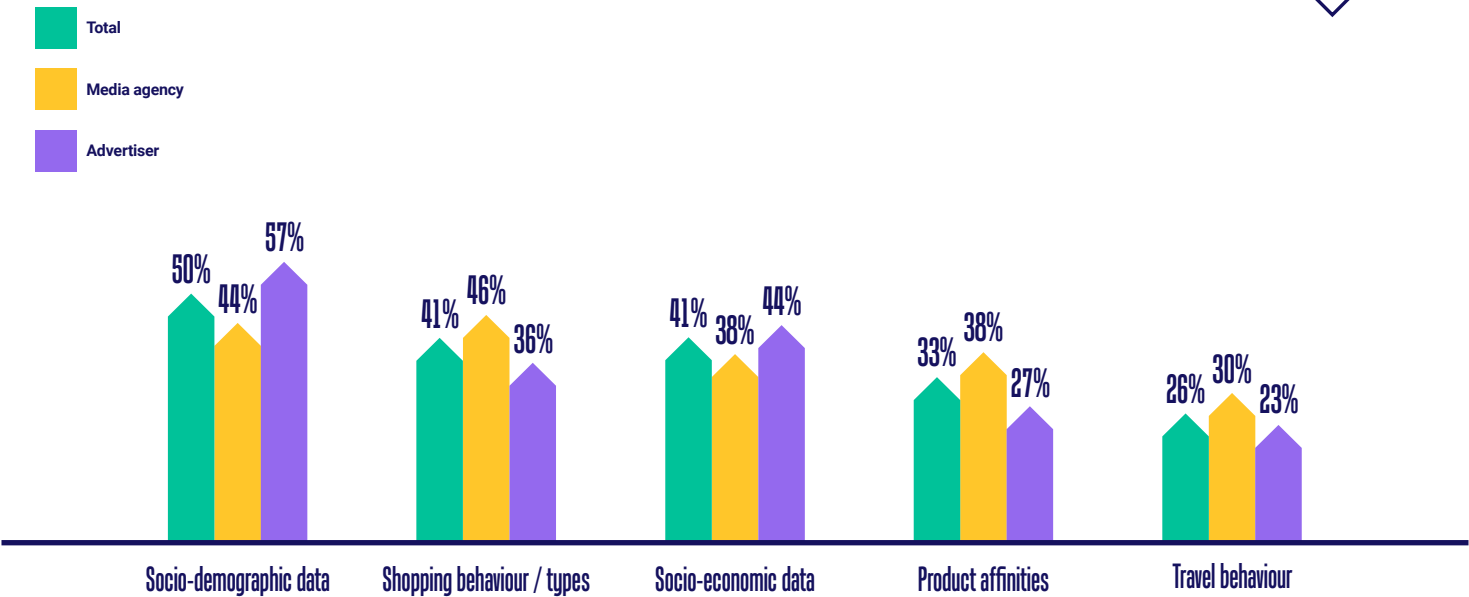
Notes: Source: C6. Which of the following would you like to see in order to give programmatic DOOH campaigns more value and make you invest more?  
Base size all respondents (208) agency (105) advertiser (103)



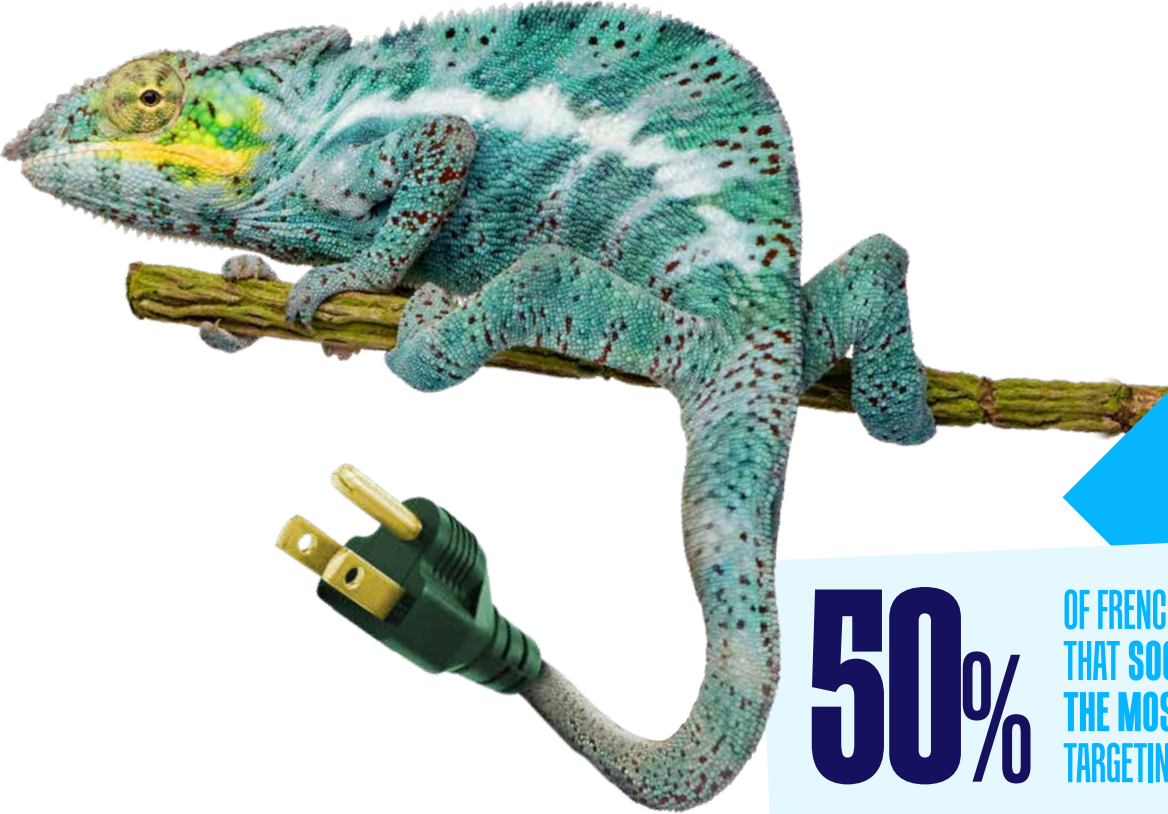
As with media executives globally, French media executives say that socio-demographic (50% in France vs 53% globally) and shopping behaviour (41% in France vs 54% globally) data are the most useful data sets to employ in the targeting of programmatic DOOH campaigns.

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

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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 (208) agency (105) advertiser (103)



50%

OF FRENCH MEDIA EXECUTIVES SAY THAT SOCIO-DEMOGRAPHIC IS THE MOST USEFUL AUDIENCE TARGETING DATA

# Summary



**The results of the surveys are clear, showing that the future for programmatic DOOH looks bright. With nearly all (99%) French media professionals 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, media executives in France 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 French 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 utilise programmatic DOOH to drive results in both brand and performance metrics is likely to persist as a key driver of programmatic DOOH adoption in France. This duality is enhanced by the capacity for brands to be hyper contextually relevant through the application of data. As such, the potential to exploit real-time audience data to inform activation is an exciting prospect for many French executives.

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



As advertisers in France 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, digital OOH and digital audio. 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 educate both advertisers and clients in France on how programmatic DOOH fits within an omnichannel campaign, and for best practices on data activation to be made widely available and accessible.

Moving forwards, as planning programmatic DOOH alongside other channels becomes standard practice, advertisers in France will need to prove its impact within a multi-channel campaign. Given this, the provision of case studies with measurable outcomes will arm French media executives with concrete evidence that will help them to showcase the value of programmatic DOOH to colleagues and clients alike.