



State of the Nation

Programmatic DOOH 2022
Germany Whitepaper



partnered with research partner



Contents

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 Germany, the US, UK, France 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 Germany, 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 German media executives reporting increases in both the number of advertisers investing in the channel, as well as the amount of budget invested.

Media executives in Germany 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. Second to this, German executives greatly appreciate the ability to easily align programmatic DOOH with other programmatic channels, a distinction that indicates the increasing importance of an integrated campaign strategy.

Mirroring sentiments shared by executives globally, German 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.

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 in Germany, according to executives.

Within this context, German 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 best practices in data activation will help German advertisers to improve the efficacy and value of programmatic DOOH campaigns.

Despite challenges, demand is expected to continue to grow over the next 12 months, with more campaigns in Germany expected to include programmatic DOOH and German 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.

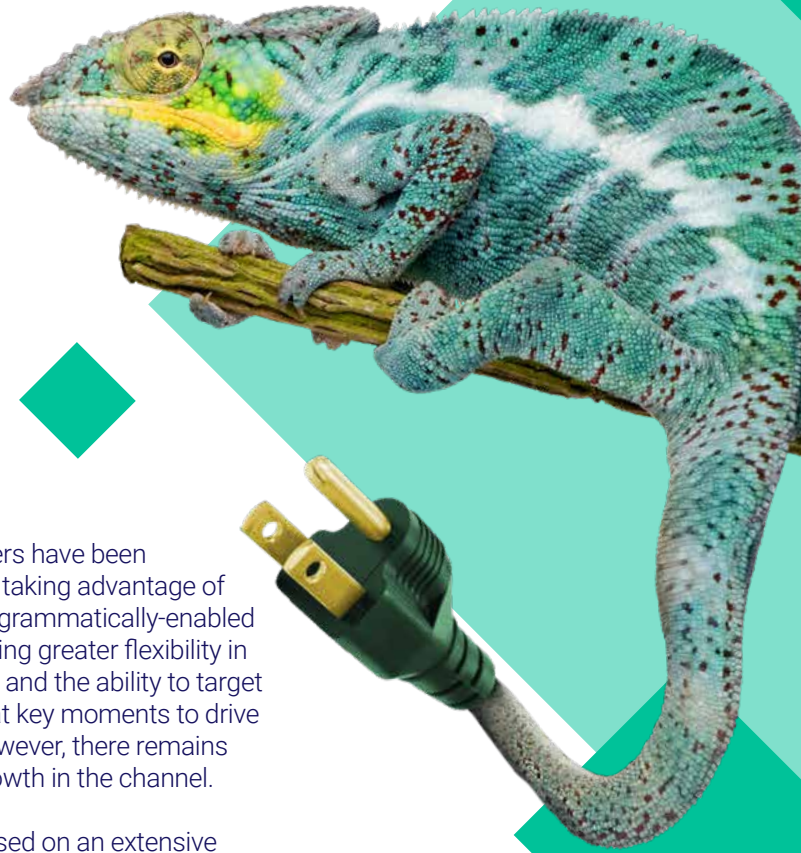
Introduction

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 German market specifically and in comparison to the 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 Germany, the UK, USA, France 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, moving away from set-in-stone pre-bought campaigns in favour of more flexible means of activation (e.g. programmatic activation).



Clients are prioritising flexibility in planning

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, over half (52%) of campaigns in Germany (vs 51% globally) have included programmatic DOOH (+7% pts vs 2021).**

52% IN THE LAST 18 MONTHS, OVER HALF OF CAMPAIGNS IN GERMANY 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).



“There has been a real shift from guaranteed bookings to more flexible non-guaranteed deals. Clients are prioritising flexibility in planning”

Kim Ringler
Director of Data Solutions, Areasolutions, Germany

“The inventory available for programmatic DOOH has increased significantly due to a large number of new displays going up. In addition, there’s been an increase in customer interest, and even acceptance of indoor DOOH screens, which has allowed us to activate additional reach. Overall, this enables us to build relevant reach [all over the country], not only in the big cities with DOOH”

Learco Oestereich
Group Manager DOOH, Areasolutions, Germany



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).

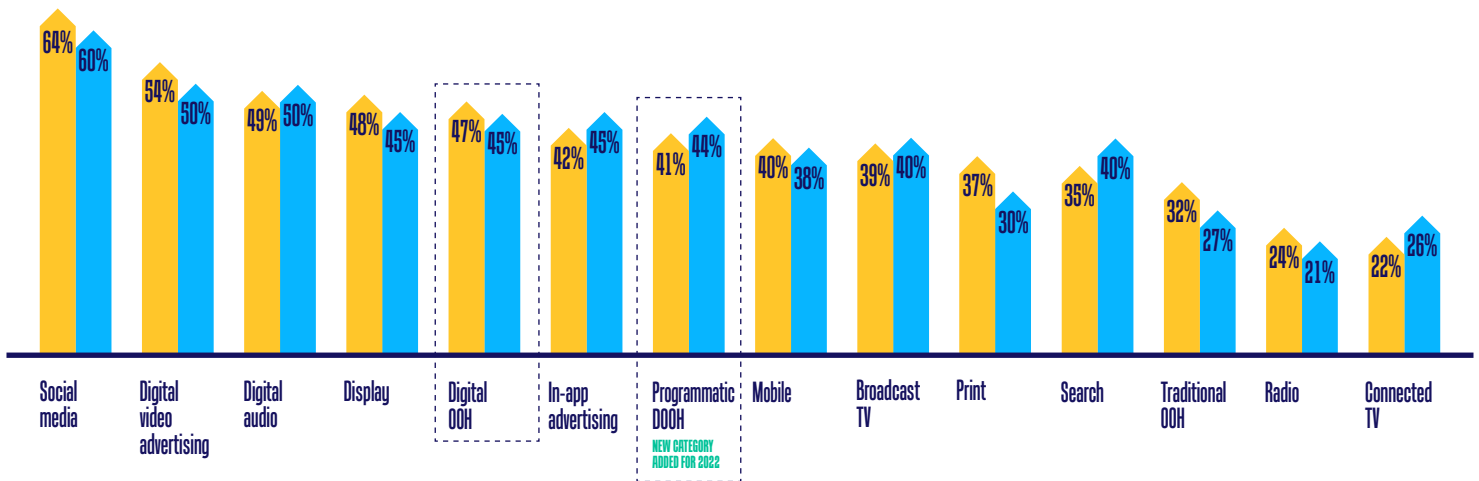
Demand is expected to continue to grow over the next 12 months. In line with our global findings, when we asked media professionals in Germany about which media they are intending to place/plan or buy in the coming year, programmatic DOOH was one of the few media types selected where executives believe they are likely to increase investment. **41% said they have planned, bought or placed DOOH programmatically in the last 12 months (vs 46% globally), and this is set to increase to 44% in the next year (vs 48% globally).**

Which of the following media have you planned, placed or bought in the last 12 months? / Which of the following media are you intending to plan, place or buy in the next 12 months?



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.

■ Have planned, bought or placed in past 12 months
 ■ Intending to buy, plan, place in next 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 (1023)



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. **34% of media professionals in Germany (vs 21% globally) say they have moved budget from other traditional channels, 34% have utilised existing digital budgets (vs 21% globally), whilst 28% of media professionals in Germany (vs 37% globally) have added new budgets to programmatic DOOH.**

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

2

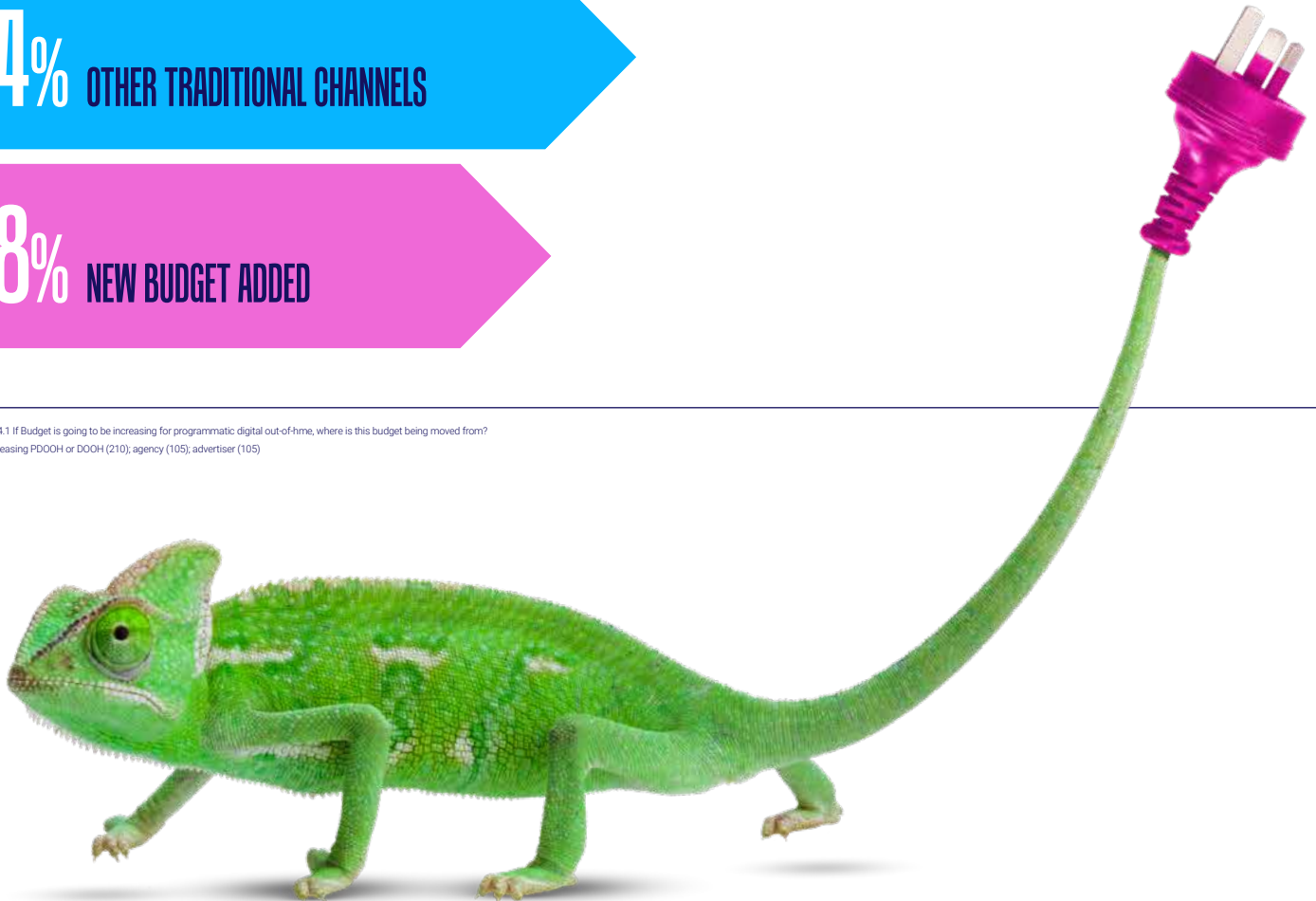
45% TRADITIONAL OOH

34% OTHER DIGITAL CHANNELS

34% OTHER TRADITIONAL CHANNELS

28% NEW BUDGET ADDED

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 (210); agency (105); advertiser (105)





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.

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. In accordance with global findings, German advertisers recognise this as a key driver in the growth of programmatic DOOH, with almost **a third of executives in Germany (32%) selecting precision targeting (vs 28% globally) as the primary reason for increasing spend in programmatic DOOH over the next 18 months.**



“The targeting and data solutions available for programmatic DOOH has developed a lot, we can now offer cross-media targeting”

Kim Ringler,
Director Data Solutions, Areasolutions, Germany

“First of all, programmatic provides you with flexibility in planning, you have the [ability to] use data to determine location and volume [of displays]. We can also use data to target specific segments more precisely in terms of time but also location. Furthermore, the ability to link programmatic OOH with different media types and apply a coordinated approach, with uniform targeting and optimisation based on the customer journey is a great advantage”

Learco Oestereich
Group Manager DOOH, Areasolutions, Germany

28% of media executives in Germany (vs 26% globally) also appreciate the close alignment that programmatic DOOH has with other programmatic channels (e.g. social, digital audio, digital video) and believe that this is likely to encourage further spend in the channel (ranked #2 in Germany, ranked joint #3 globally).

Mirroring sentiment shared by executives globally, advertisers in Germany greatly value the duality of programmatic DOOH to be both a broadcast and a direct response channel, as required (ranked #3 in Germany, ranked joint #1 globally). 27% of executives in Germany (vs 28% globally) believe that this hybridity will lead to increases in investment over the next 18 months.

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?

3

32%

Precision, eg. targeting certain frames, locations, audiences, performance metrics or using triggers

28%

It aligns easily with other programmatic channels

27%

It becomes a broadcast and direct response channel

26%

Location targeting

25%

Programmatic buying and planning capabilities



“You can be more flexible in aligning programmatic OOH to your strategic goals, compared with classic bookings. With data on relevant target group segments, you can scale audiences and build up high local and national reach. You can also achieve greater relevance through contextually relevant messaging and messaging specific to a certain location. Programmatic is indispensable if you want to exploit these opportunities”

Learco Oestereich
Group Manager DOOH, Areasolutions, Germany

“The big advantage of DOOH is the reach you can achieve, without adblockers or ad fraud. With DOOH we can reach advertising-averse target groups in public spaces. We can also reach drivers, who cannot be reached online or via mobile when they are driving. Its large format makes it an impactful form of advertising media, generating ‘big moments’ which is an important component in the customer journey”

Kim Ringler
Director Data Solutions, Areasolutions, Germany

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 (190)

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.

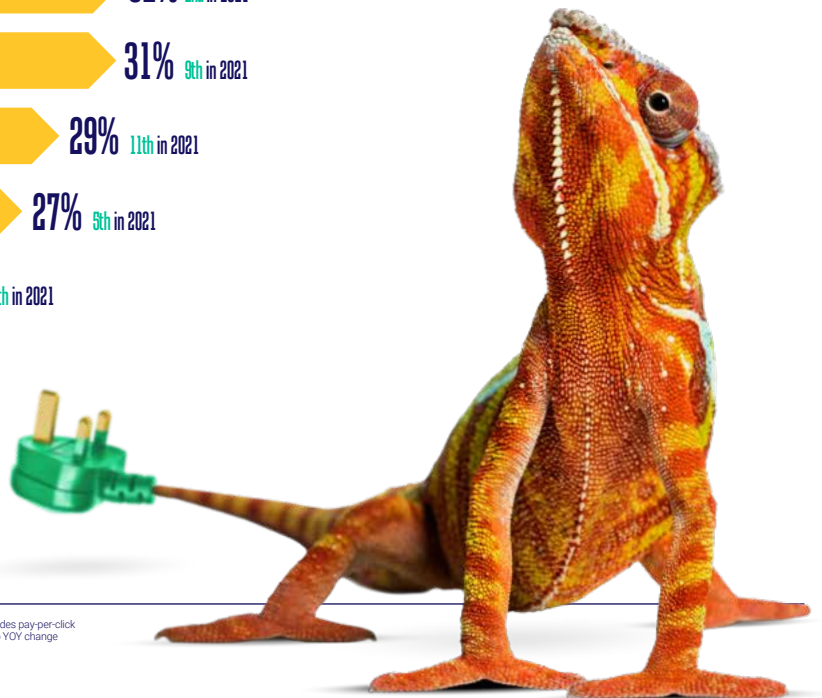
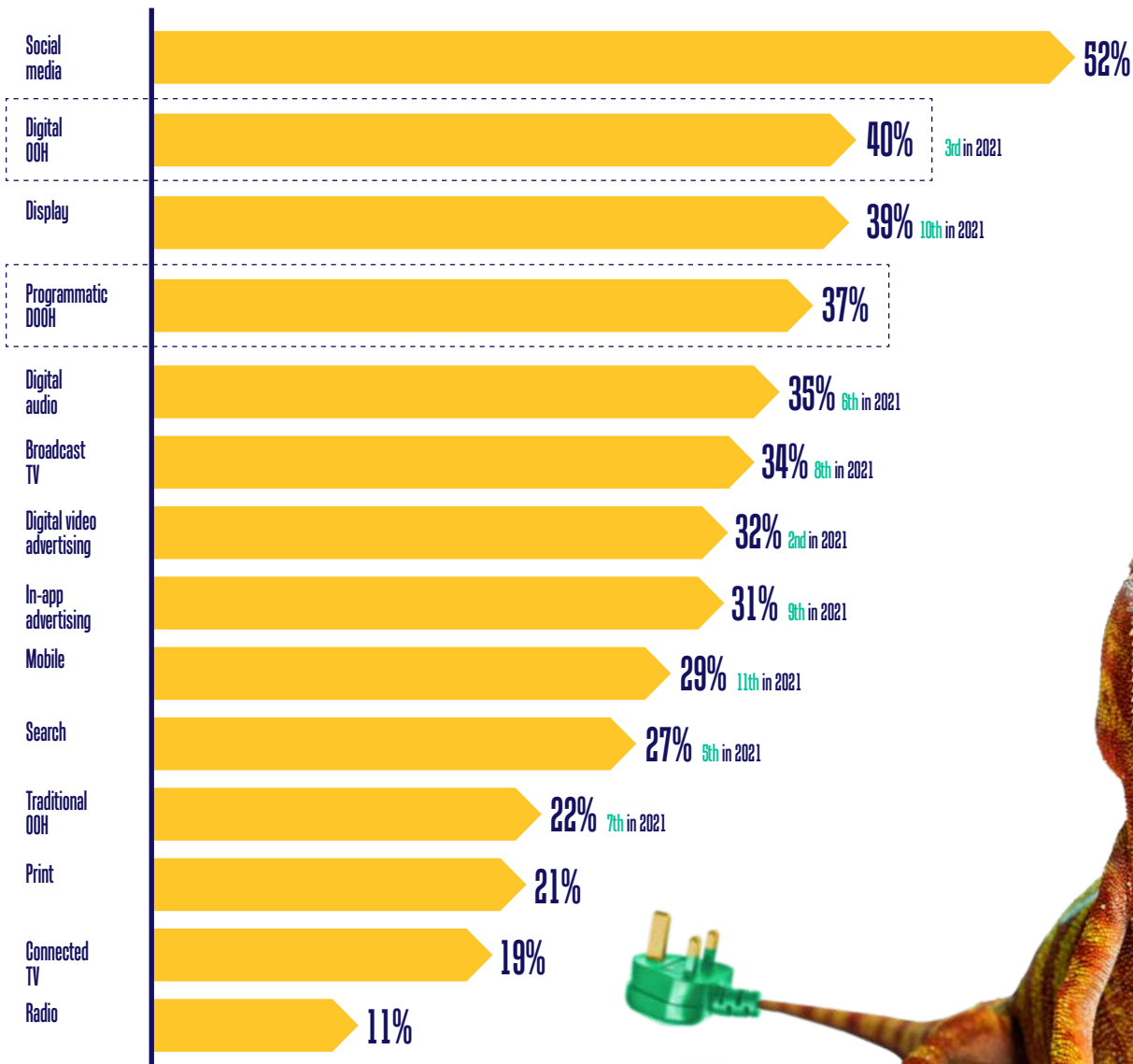
As a result, it's no surprise that German executives continue to select DOOH (40%) and programmatic DOOH (37%) as two of the top five media channels developing the most innovative opportunities for advertisers.

Programmatic is indispensable if you want to exploit these opportunities

4

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.



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 7) % 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

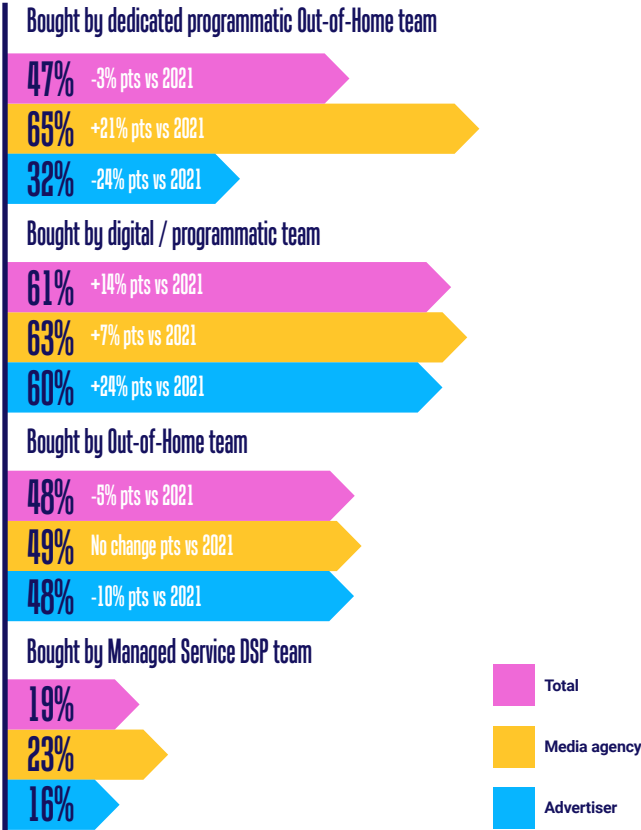


Today, it is standard practice for advertisers to take an omni-channel approach when planning and buying programmatic campaigns, and this is now extending to include digital out-of-home.

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 switch on/ off different channel activations as needed.

This shift towards an omni-channel strategy is reflected in the teams that are buying programmatic DOOH. As with executives globally, this year media executives in Germany are reporting a decrease in buying through OOH teams (-5% pts in Germany vs -1% pt globally) and an increase in buying through digital/programmatic teams (+14% pts in Germany vs +5% pts globally).

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



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 (93), agency (43), advertiser (50)



“Programmatic is an integrated part of our holistic OOH planning and is also used as part of cross-media all-screen campaigns”

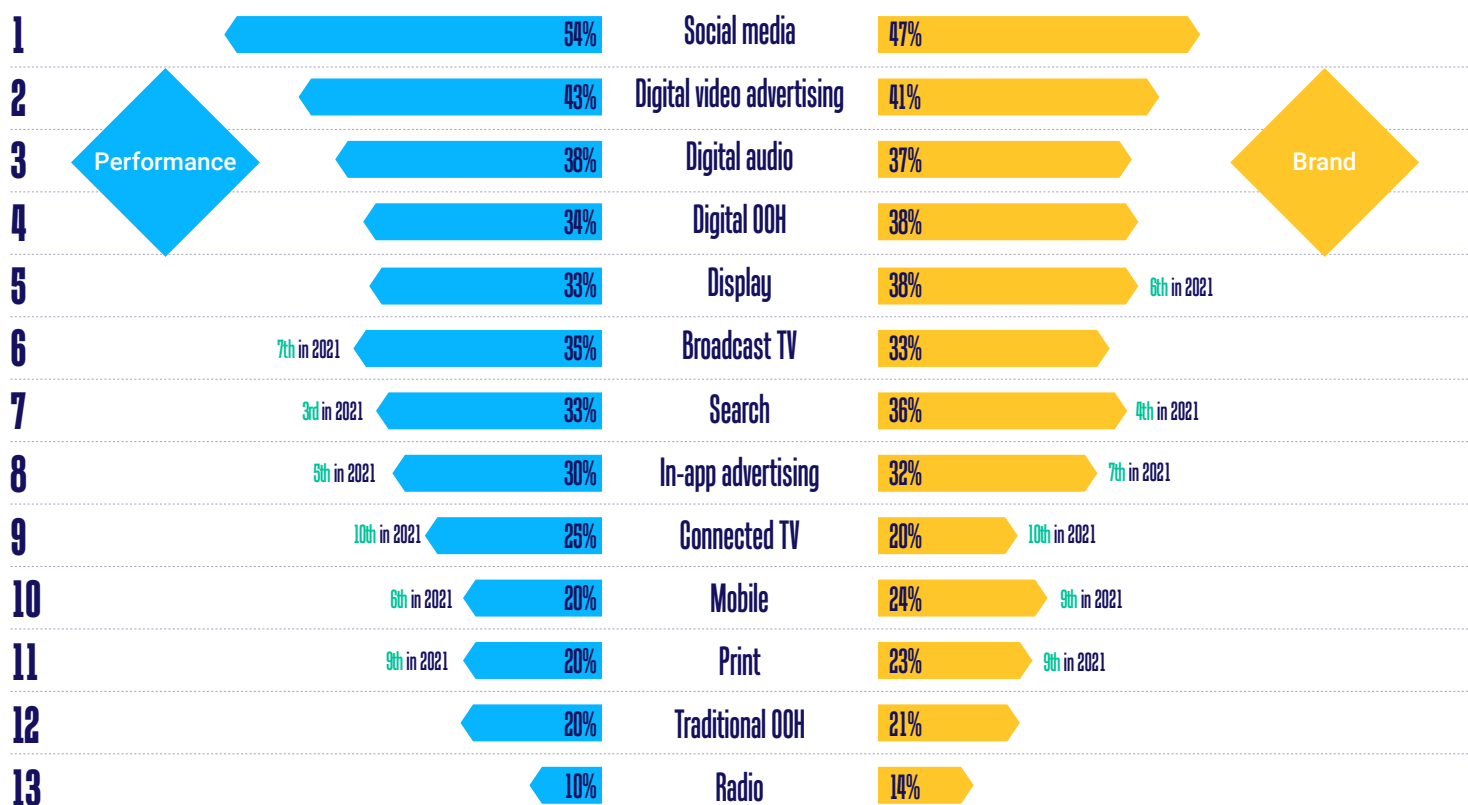
Kim Ringler
Director Data Solutions, Areasolutions, Germany

As such, channels that can be bought programmatically remain the most popular channels to run alongside programmatic DOOH, with executives in Germany and globally selecting **social media as the most likely pairing for both performance (54% in Germany, 56% globally) and brand-led campaigns (47% in Germany, 51% globally), closely followed by digital video advertising.**

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

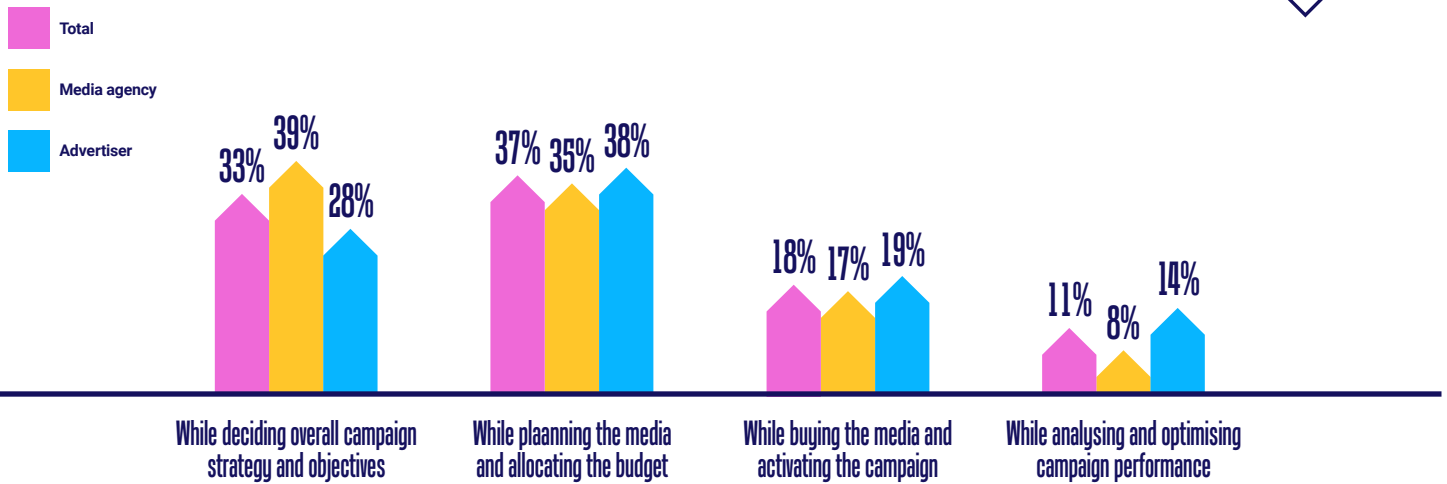


Notes: 1) Social media includes Facebook, Instagram, Twitter etc. 2) Digital audio includes streaming audio, streaming and podcasts 3) Search includes pay-per-click 4) Display excludes social media 5) Mobile excludes in-app advertising 6) Broadcast TV excludes TV advertising served via the internet 6) % 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 (210)

Corresponding with the global trend towards omnichannel campaign strategies, nearly three quarters of German media professionals surveyed make the decision to include programmatic DOOH during the early stages of the campaign planning and activation process, with 33% deciding to include it during the campaign ideation/strategising phase (vs 25% globally), and 37% while planning the media and allocation of budgets (vs 49% globally).

7

While planning a campaign, when in the media planning process is the decision to include programmatic digital out-of-home typically happening?



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 (210) agency (105) advertiser (105)



3/4 OF GERMAN 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.

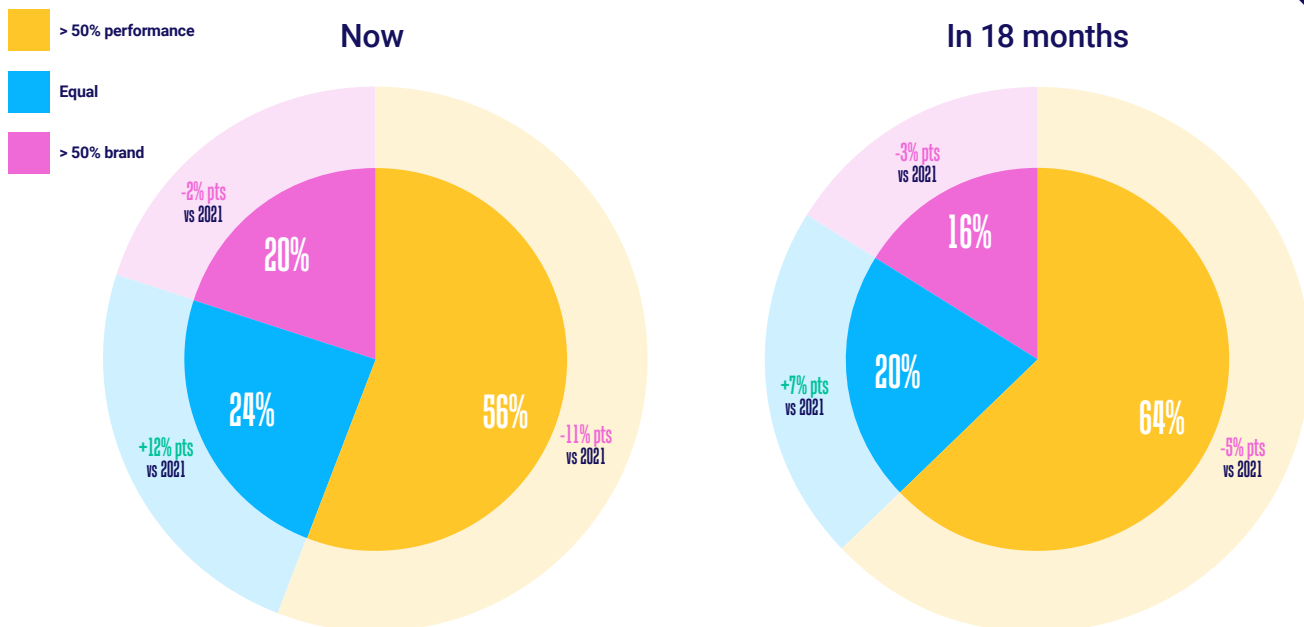
Programmatic is generally considered to have broadened DOOH's appeal as a hybrid medium, combining the mass-reach of broadcast - conducive to branding and upper funnel activities - with data-driven dynamism, synonymous with digital performance marketing and lower funnel conversions.

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 (56%). **This is expected to continue into 2023, with performance focused campaigns predicted to take the lion's share of budget,** perhaps unsurprisingly given current uncertainties around the broader economic outlook.



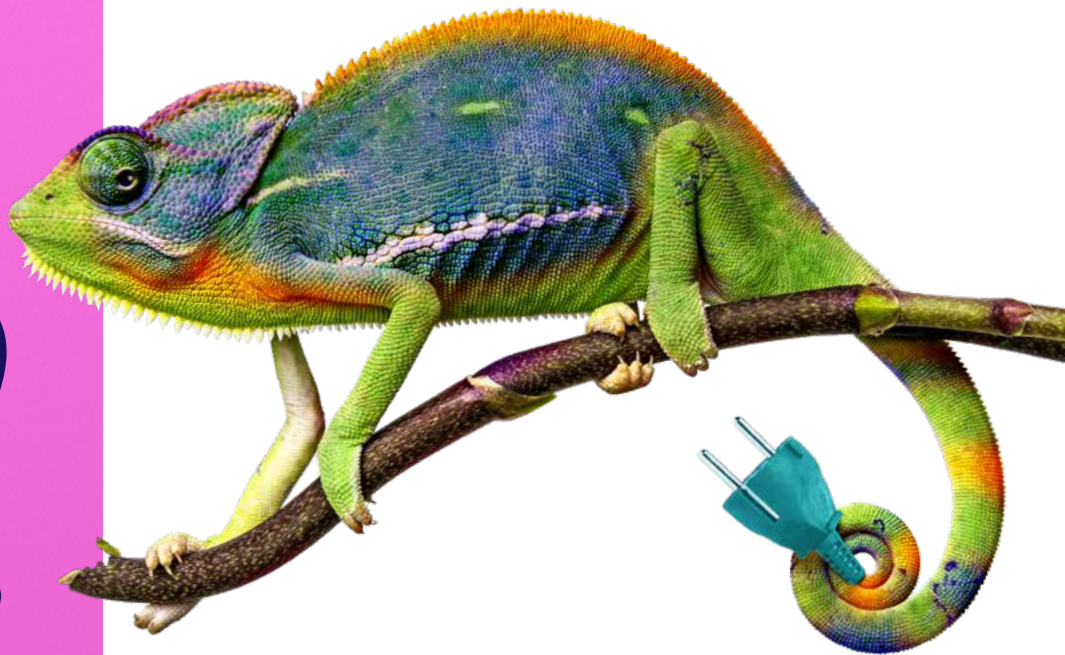
What percentage breakdown is your performance vs branding budgets now / in 18 months time?

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 (210)

Defining the new landscape

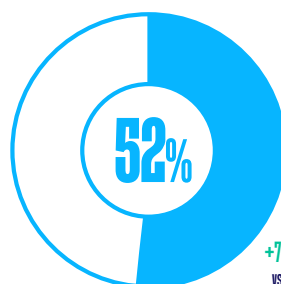


Expected demand for programmatic DOOH

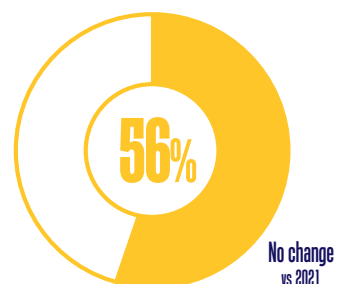
As outlined above, demand for programmatic DOOH is expected to continue to grow. In line with predicted global demand at 57%, 56% of campaigns in Germany are expected to include programmatic DOOH over the next 18 months, according to executives.

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

9



Last 18 months



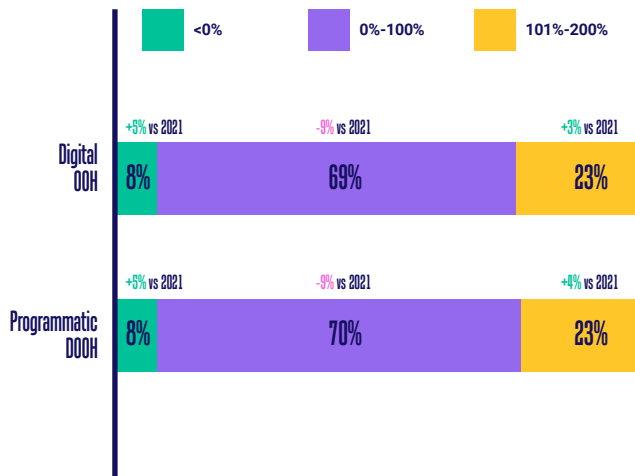
Next 18 months

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

In addition, **23% (+4% pts vs 2021)** of executives in Germany believe that advertising investment in programmatic DOOH will more than double (101-200%) over the next 18 months (vs 19% globally).

How do you think your advertising investment will change in the next 18 months?

10



Notes: Source: BB. How do you think your advertising investment in the following media will change in the next 18 months? Base size: all respondents (210)

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.



“The volume of programmatic DOOH campaigns will continue to grow, and with that, the relevance of programmatic DOOH both in holistic OOH planning and cross channel planning will also grow”

Kim Ringle
Director Data Solutions, Areasolutions, Germany



23%

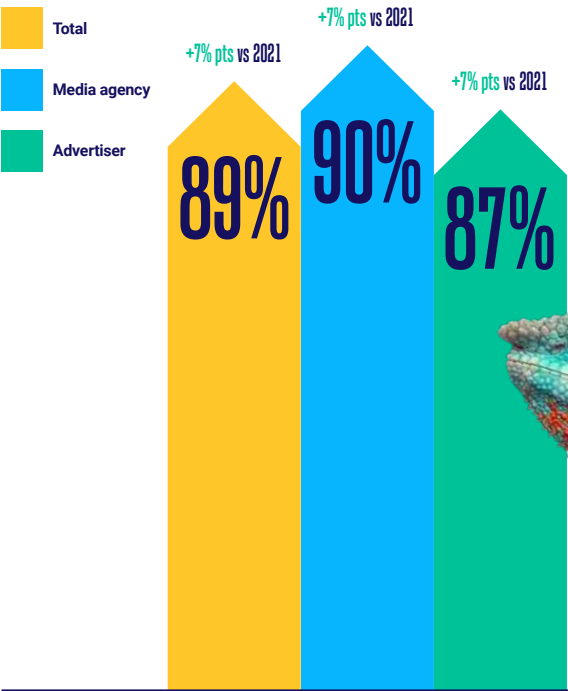
OF EXECUTIVES IN GERMANY BELIEVE THAT ADVERTISING INVESTMENT IN PROGRAMMATIC DOOH WILL MORE THAN DOUBLE (101-200%) OVER THE NEXT 18 MONTHS

In-house investment

To cater for the expected demand outlined above, 89% (+7% pts vs 2021) of media executives in Germany (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 (208) agency (105) advertiser (103)



Overcoming barriers to adoption



1 More widespread understanding of programmatic DOOH

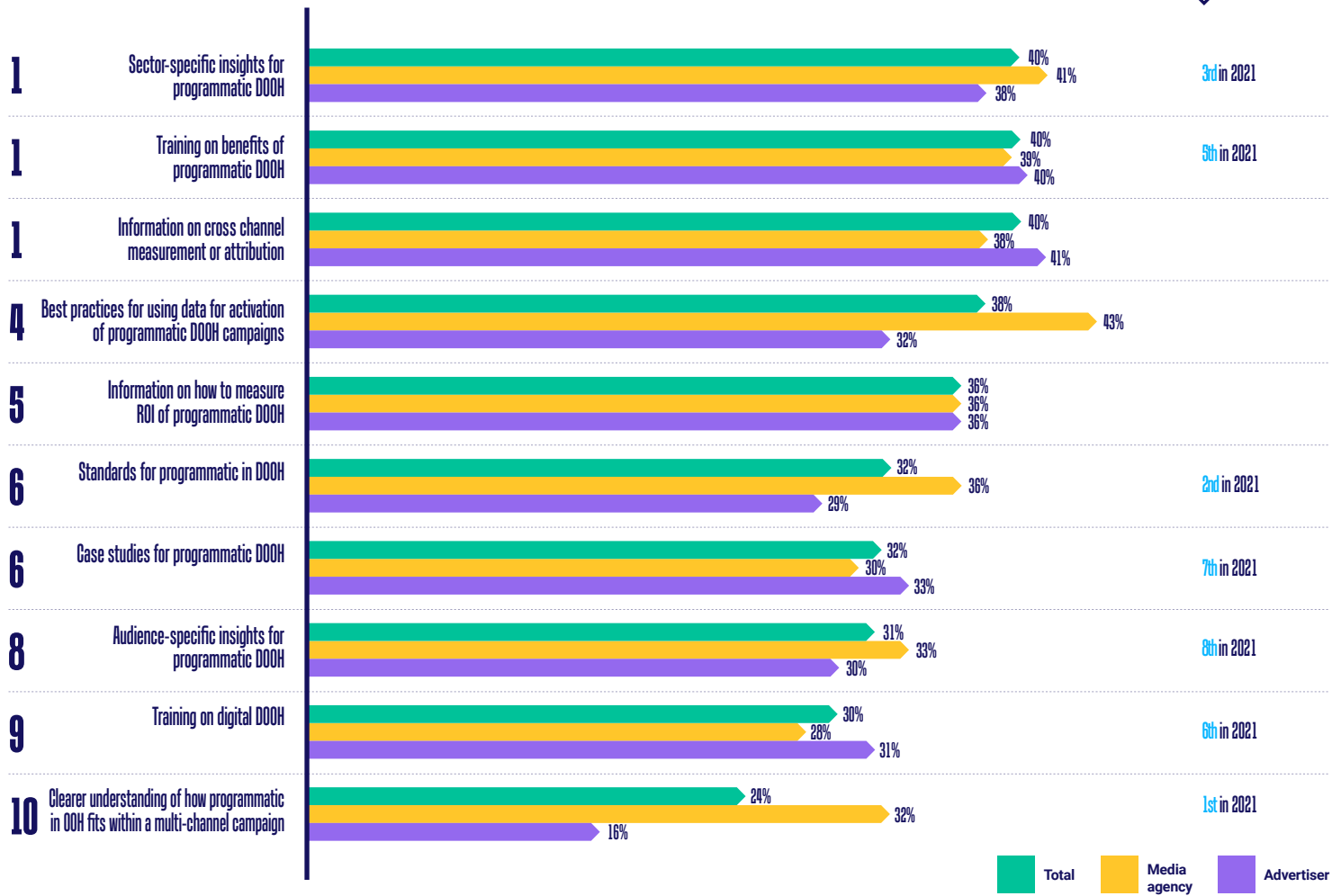
Given the alignment in planning and buying of programmatic DOOH alongside other programmatic activity, it is no surprise that investment in widespread education will unlock further spend in the channel by helping advertisers to better understand the key benefits of programmatic DOOH and enabling them, 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 cross-channel measurement and attribution. 43% of agency executives in Germany (vs 45% globally) feel that best practices in using data for programmatic DOOH would help them to better understand the channel, and 41% of advertising executives in Germany (vs 40% globally) said that they would like to know more about how to accurately measure programmatic DOOH within an omni-channel campaign.

As a sign of the channel's evolution, in 2021 German and global advertisers wanted a clearer understanding of how programmatic DOOH fits within a multi-channel campaign (ranked #1 in 2021 in Germany and globally), and for standards in programmatic DOOH to be clearly articulated (ranked #2 in 2021 in Germany and globally). However, in 2022, advertisers in Germany seem to be less concerned with these foundational considerations and more focused on refining programmatic DOOH campaigns through best practices for data activation, and audience and sector-specific insights.

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



Notes: Source: D4. Which, out of the following, would help you learn more about programmatic DOOH advertising?
Base size all respondents (210) agency (105) advertiser (105)

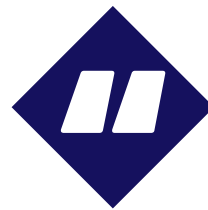




2 Measurement and Case Studies

To complement education on the benefits of programmatic DOOH, German 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, 40% of media professionals in Germany would like more information on cross-channel measurement and attribution in order to demonstrate programmatic DOOH's impact within an omni-channel campaign.



“The technical development has happened faster than the development of performance measurement. Performance values need to be articulated and campaign measurement needs to be improved. Comparability with other programmatic channels in terms of KPI evaluation is very important for clients, and they are increasingly demanding it”

Learco Oestereich
Group Manager DOOH, Areasolutions, Germany



Performance values need to be articulated and campaign measurement needs to be improved

3 Precision targeting and real-time audience data



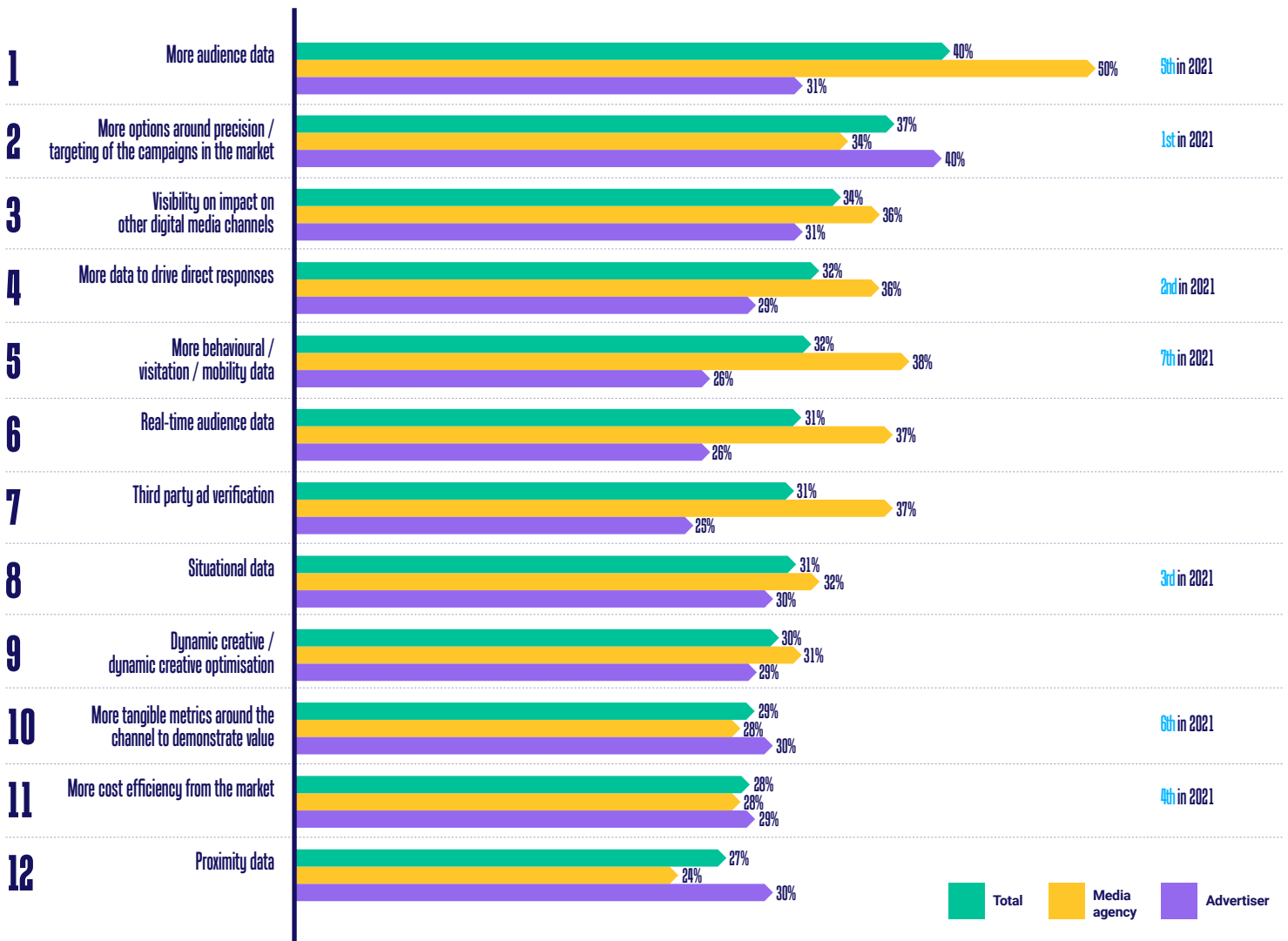
In light of the increasing alignment of programmatic DOOH with other programmatic digital channels, it is unsurprising that brands are keen to get their hands on as much data as possible in order to build out multi-layered audience segments and improve the efficacy of campaigns.

This year, 40% of executives in Germany and 39% globally have signalled that the provision of more audience data plus additional targeting options (37% in Germany vs 38% globally) are key to improving the value of, and boosting investment in, programmatic DOOH.

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?

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

13

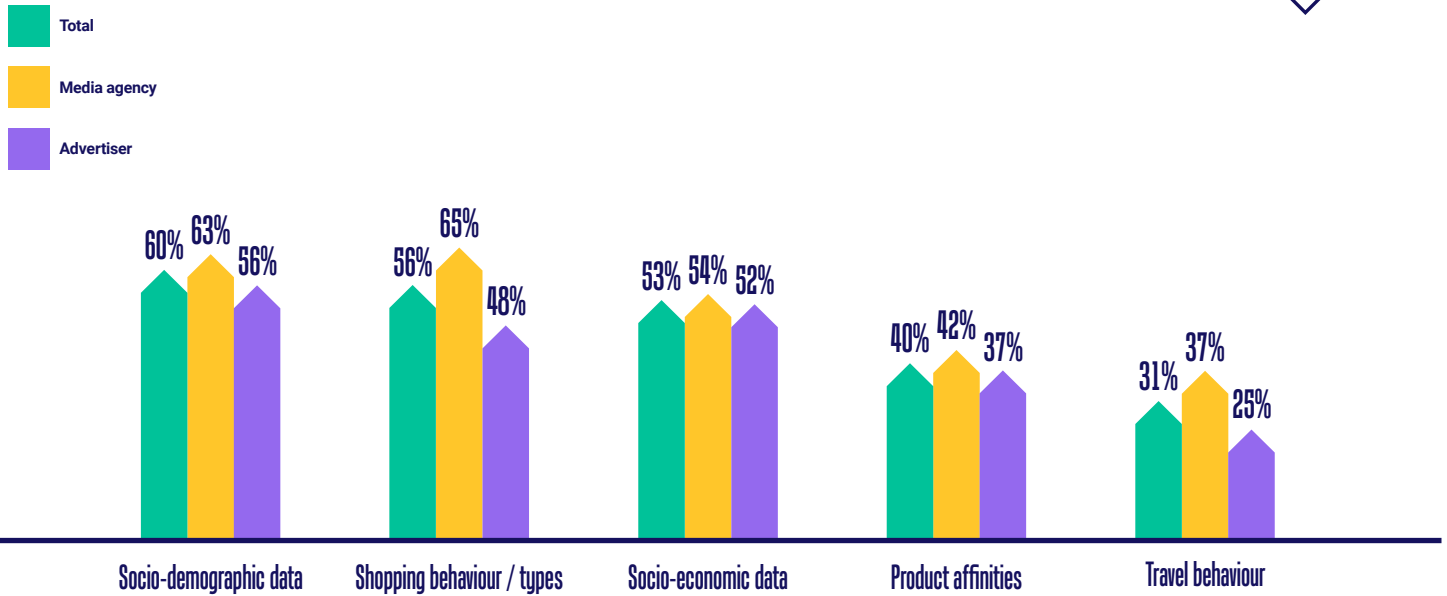


Notes: Source: C6. Which of the following would you like to see in order to give programmatic DOOH campaigns more value and make you invest more?
Base size all respondents (210) agency (105) advertiser (105)

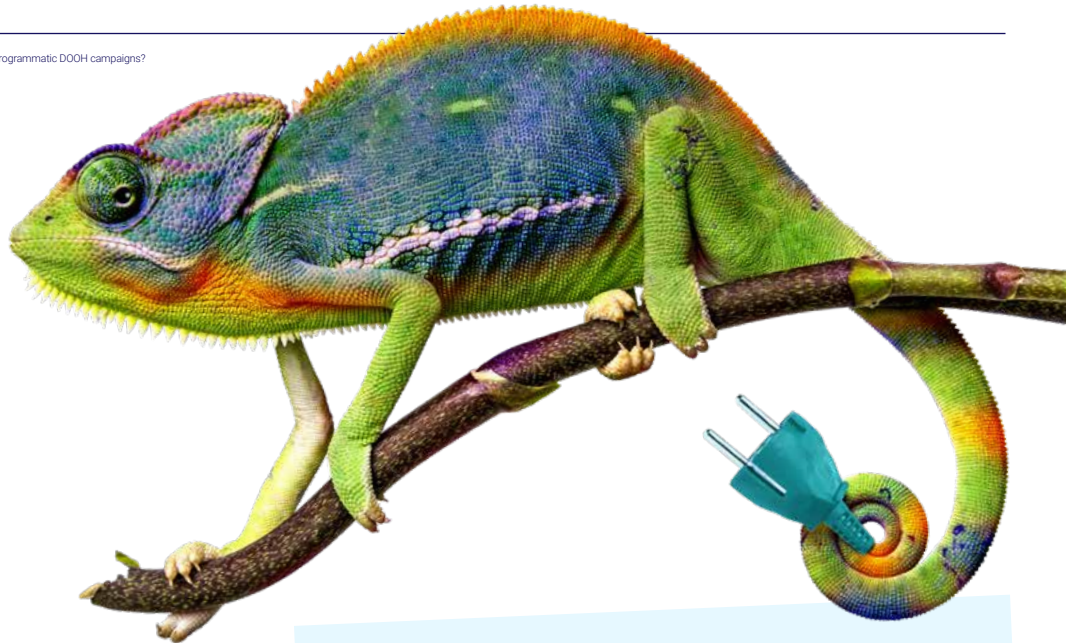
In terms of types of audience data that advertisers perceive to be most valuable, German executives echo executives globally, highlighting that sociodemographic (60% in Germany vs 53% globally) and shopping behaviour (56% in Germany vs 54% globally) data are the most useful data sets to employ in the targeting of programmatic DOOH campaigns.

14

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



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)



60% OF GERMAN MEDIA EXECUTIVES SAY THAT SOCIO-DEMOGRAPHIC 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 (93%) German 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, German 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 advertisers in Germany 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.

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



The ability to target out-of-home audiences with laser precision is likely to persist as a key driver of programmatic DOOH adoption in Germany. In addition, a close alignment with other programmatic channels makes programmatic DOOH a seamless pairing to any digital campaign, and will likely serve to boost further growth in the channel according to German executives.

As advertisers in Germany 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 in Germany, 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 best practices in data activation will improve the effectiveness of programmatic OOH campaigns, and will help German advertisers to educate clients and colleagues on how to extract the most value out of the channel.