

Programmatic DOOH 2022

UK white paper



# State of the Nation



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# Executive summary



**In June 2022, VIOOH partnered with MTM to survey 1,000 agency and advertising executives across the UK, US, Germany, 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 the UK, 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 UK media executives reporting increases in both the number of advertisers investing in the channel, as well as the amount of budget invested.

Moreover, media executives in the UK recognise this flexibility as a key strength of the channel, selecting flexibility in buying and campaign activation as the primary reason that spend in programmatic DOOH will increase over the next 18 months. In addition, executives in the UK appreciate the cost efficiency that is achieved through programmatic activation (i.e. minimal wastage due to trigger-based activation) and believe that this will continue to encourage spend increases in the channel in the near-term.

In line with executives globally, media executives in the UK 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. 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.

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, digital video and digital audio the most popular channels to pair it with, according to UK media executives.

Within this context, media executives in the UK 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 UK media professionals boost the effectiveness of programmatic DOOH campaigns, and educate clients and colleagues on how to extract the most value out of programmatic DOOH campaigns.

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

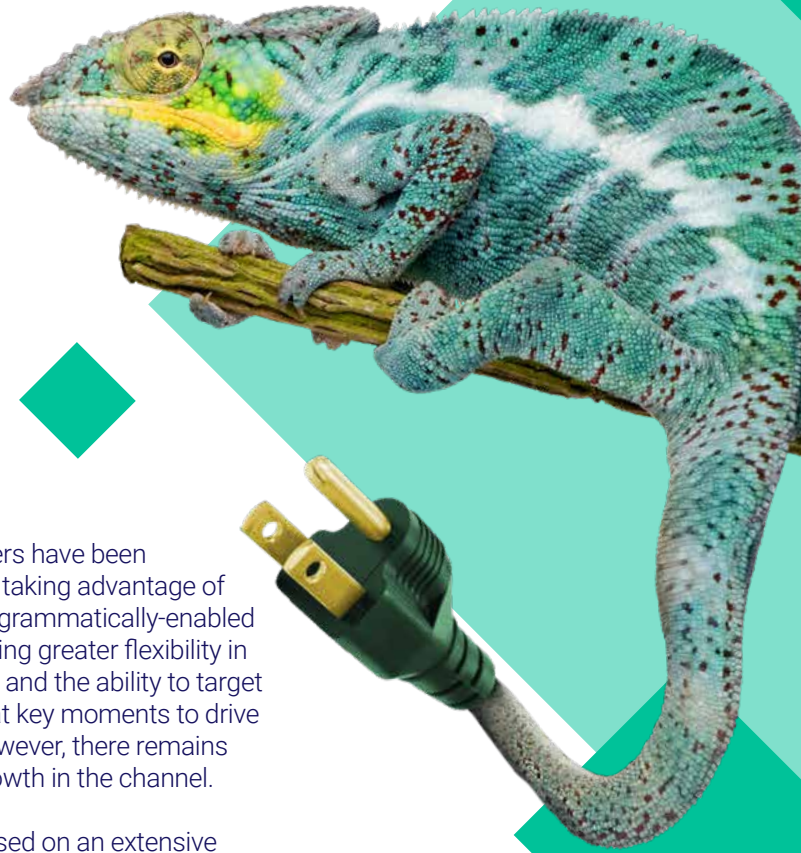
# Introduction

**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 UK 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 the UK, USA, Germany, 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, ditching set-in-stone pre-bought campaigns in favour of more flexible means of activation (e.g. programmatic activation).



# Clients that have historically invested in a programmatic, data-led approach across other channels are ready to understand the capabilities of programmatic DOOH

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, half (50%) of campaigns in the UK (+3% pts vs. 2021) have included programmatic DOOH (vs. 51% globally).**

**50%** OF 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).



*“Awareness has certainly grown over the last few years. I think all parts of the ecosystem took time over the pandemic to reflect and put more thought into what they wanted their executions to look like in the future”*

Alys Donnelly  
Head of Programmatic, Kinetic UK

*“Programmatic DOOH is certainly higher on the agenda this year for all stakeholders. Clients that have historically invested in a programmatic, data-led approach across other channels are ready to understand the capabilities”*

James Trott  
Head of Product, Matterkind UK (IPG)



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, retail, tourism).

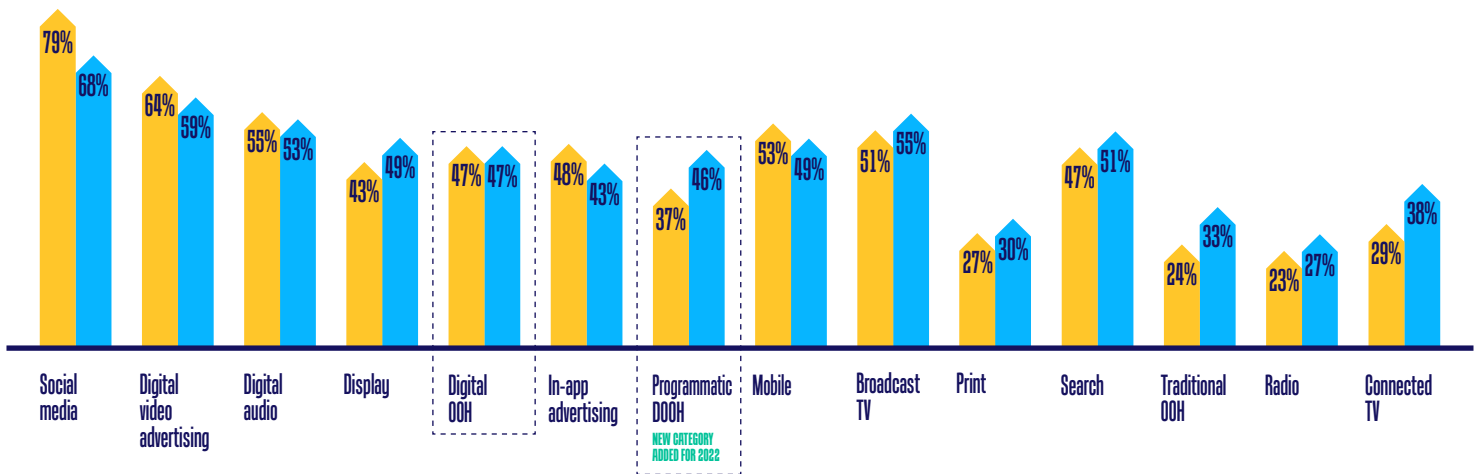
Demand is expected to continue to grow over the next 12 months. When we asked media professionals in the UK about which media they are intending to place/plan or buy in the coming year, programmatic DOOH was one of the few media channels selected where executives believe they are likely to increase investment. **37% said they have planned, bought or placed DOOH programmatically in the last 12 months (vs. 46% globally), and this is set to increase to 46% 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 (203)



*“We are seeing a lot of interest from retail, whether that be FMCG or Apparel, High Street or Supermarket – the targeting and measurement capabilities combined with dynamic creative messaging make for compelling campaigns”*

James Trott  
Head of Product, Matterkind UK (IPG)

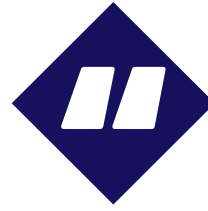
*“We’ve not found a brand, or sector or vertical that this approach doesn’t work for. Every brand has a specific audience, and we can get in front of that audience in a more flexible way than ever before”*

Alys Donnelly  
Head of Programmatic, Kinetic UK



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. **38% of media professionals in the UK (vs. 37% globally) say they have added new budgets to programmatic DOOH, 20% have moved budget from other traditional channels (vs. 21% globally) and 27% have utilised existing digital budgets (vs. 21% globally) to buy programmatic DOOH.**

## **We are seeing brands embrace being able to get in front of more specific audiences**



*“As brands are learning more about the programmatic OOH world and the benefits that it can bring, we are seeing them embrace being able to get in front of more specific audiences that add greater value to them. We are also seeing brands take advantage of the flexibility, agility and creative opportunities that programmatic provides. I see it as something that has evolved a lot over the last few years and is going to keep evolving for some time to come”*

Alys Donnelly  
Head of Programmatic, Kinetic UK

**2**

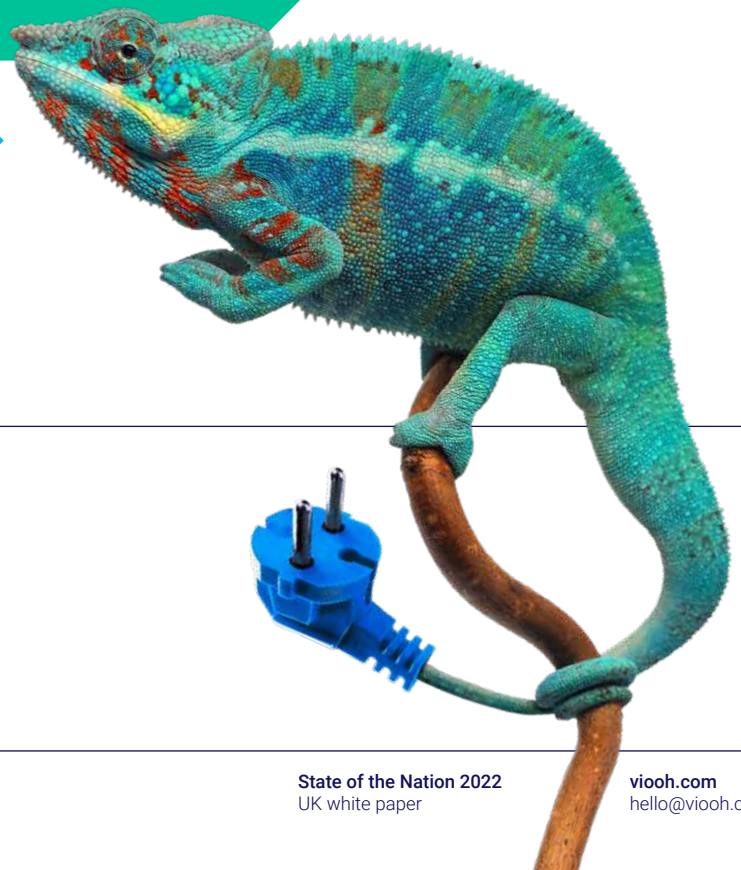
If budget is going to be increased for programmatic digital out-of-home, where is this budget being moved from?

**56%** TRADITIONAL OOH

**38%** NEW BUDGET ADDED

**27%** OTHER DIGITAL BUDGETS

**20%** 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 (169), agency (88), advertiser (81)



# 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. As such, media executives in the UK believe that **flexibility (34%) and cost efficiency (32%) are key drivers in the growth of programmatic DOOH**, with over a third of executives selecting these attributes as the top two reasons for increasing spend in programmatic DOOH over the next 18 months.



*“Leveraging our own proprietary data stack within IPG, Acxiom, or partners in the data landscape allow for the creation of custom and high-value audiences for clients. Mapping these audiences across the DOOH landscape allows for precision and efficient use of budget”*

James Trott,  
Head of Product, Matterkind UK (IPG)

*“We use a whole host of data sources to really drill down into the specific audience that the client is interested in. This data ranges from first party data to purchase data to attitudinal data to online behaviour and offline behaviour. We can also use data as triggers for delivery rather than audience building, such as breaking news, sports scores, traffic levels, pollution levels, weather and temperature levels”*

Alys Donnelly,  
Head of Programmatic, Kinetic UK

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. Media executives in the UK recognise this as a significant strength of programmatic DOOH, **ranking audience targeting joint third (and joint #5 globally) as a reason to increase spend in the channel in the near-term.**

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

34%

Flexibility e.g. fluidity of budgets and easy planning

32%

Cost efficient

31%

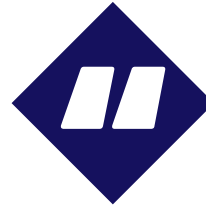
Audience targeting

31%

Brand safety, including lack of bot / click fraud

31%

Ability to use dynamic creative



*“DOOH elevates the programmatic offer as a trusted media which delivers impressions of a high quality in the physical world”*

Leia Reuter  
Managing Partner OOH, Dentsu UK

*“Flexibility and agility within the buy are often referenced as benefits of this route to market. Being able to upweight or downweight according to a live dataset such as footfall or stock for example, or even pause and reactivate a campaign entirely”*

James Trott  
Head of Product, Matterkind UK (IPG)

*“We see significant uplifts in footfall and brand metrics as well as sales uplift. Programmatic OOH can drive all these areas as well as providing specific programmatic benefits around flexibility, agility, and the application of granular data”*

Alys Donnelly  
Head of Programmatic, Kinetic UK

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.

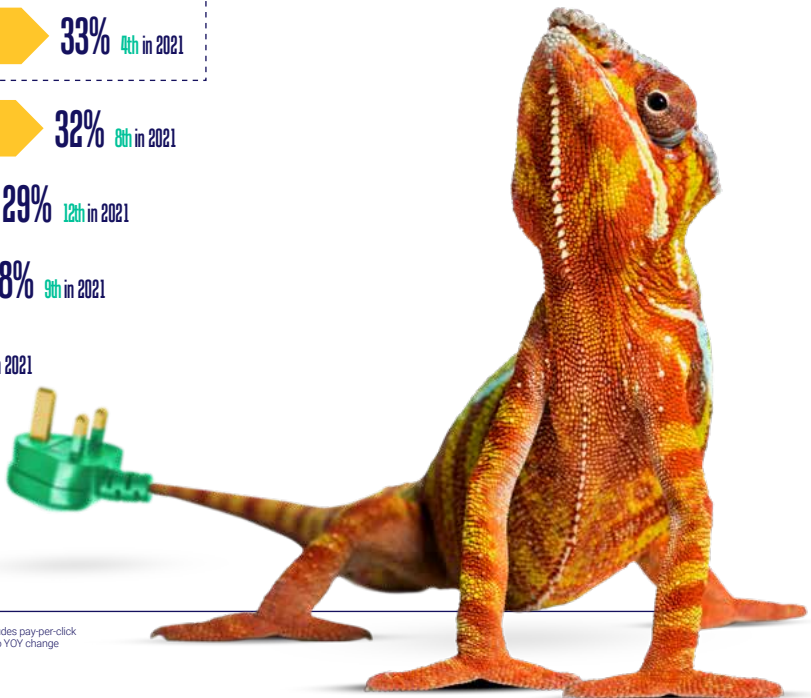
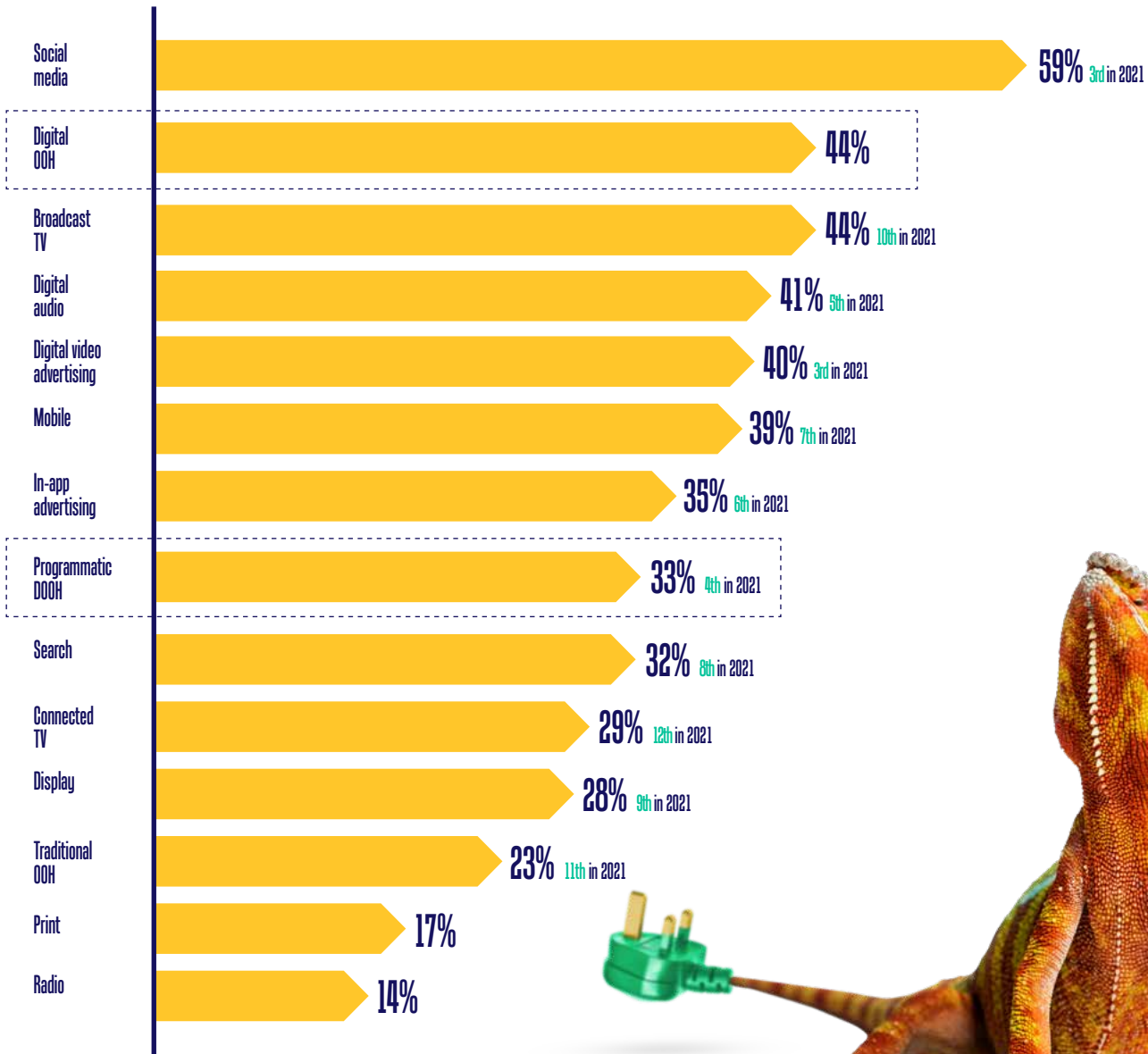
As a result, it's no surprise that executives in the UK continue to select DOOH (44%) as one of the top three media types (vs 43% globally) developing the most innovative opportunities for advertisers.

# DOOH elevates the programmatic offer as a trusted media which delivers impressions of a high quality in the physical world



## 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 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 (203)



**“**  
**There are some amazing data APIs, in terms of what to activate and when**



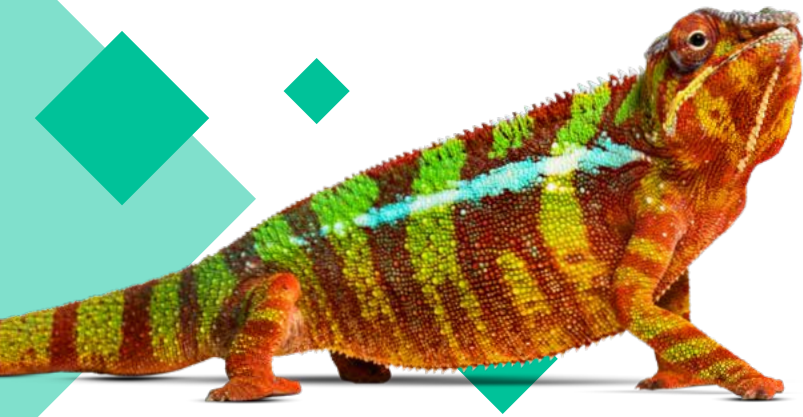
**“There is real potential for innovation within DOOH. Particularly from a creative perspective and what’s possible when using APIs to trigger activity in relevant moments. Effectiveness will always increase when supported by context and the sky is the limit as BA demonstrated back in 2013”**

James Trott  
Head of Product, Matterkind UK (IPG)

**“There are a lot of innovative possibilities with this channel. It’s inherently a very creative and open channel which gives brands opportunities to be playful and engage directly with their audience”**

Alys Donnelly  
Head of Programmatic, Kinetic UK

# 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 and 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 the UK are reporting a **decrease in buying through OOH teams (-8% pts in the UK vs -1% pt globally) and an increase in buying through digital/programmatic teams (+22% pts in the UK vs +5% pts globally).**



*“At Dentsu we have built a team that consists of both OOH and programmatic experts to help our clients navigate this evolving and exciting space”*

Leia Reuter  
Managing Partner OOH, Dentsu UK

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



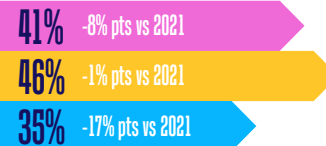
## Bought by dedicated programmatic Out-of-Home team



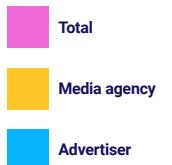
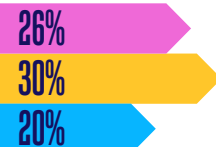
## Bought by digital / programmatic team



## Bought by Out-of-Home team



## Bought by Managed Service DSP team



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?

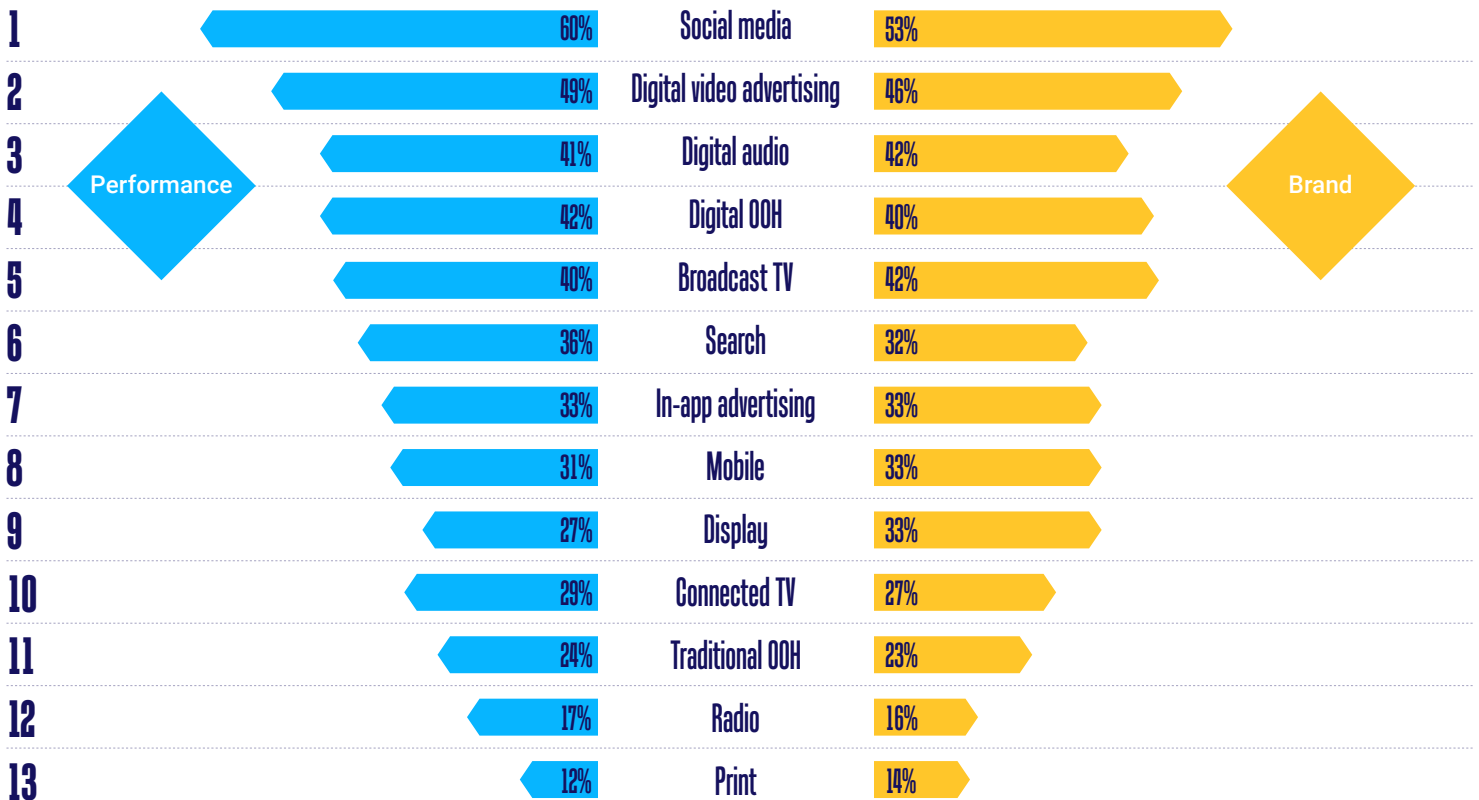
Base size: all who place PDOOH total (97), agency (50), advertiser (47)

As such, channels that can be bought programmatically remain the most popular channels to run alongside programmatic DOOH, with executives in the UK and globally selecting **social media as the most likely pairing for both performance (60% in UK vs 56% globally) and brand-led campaigns (53% in UK vs 51% globally), closely followed by digital video advertising and digital audio.**

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 (203)



**Brands are cottoning on to the idea of running cross channel and trying to build the benefits of running across channels, or doing that in a more joined up way**



*“Out of home works well with a lot of different channels, like mobile and digital audio. Brands are cottoning on to the idea of running cross channel and trying to build the benefits of running across channels, or doing that in a more joined up way”*

Alys Donnelly  
Head of Programmatic, Kinetic UK

*“We have clients who invest in programmatic capability to help manage Reach & Frequency cross-channel, including DOOH. Matterkind is well positioned to understand who has been exposed to what using common identifiers and graphs, and we use this to optimise the media touchpoints of a campaign in flight”*

James Trott  
Head of Product, Matterkind UK (IPG)

*“Audio is a popular channel to combine programmatic DOOH with, along with social media and display. Those are a few key areas where we are seeing cross-over”*

Alys Donnelly  
Head of Programmatic, Kinetic UK

**“  
Out of home  
works well with  
a lot of different  
channels, like  
mobile and  
digital audio**

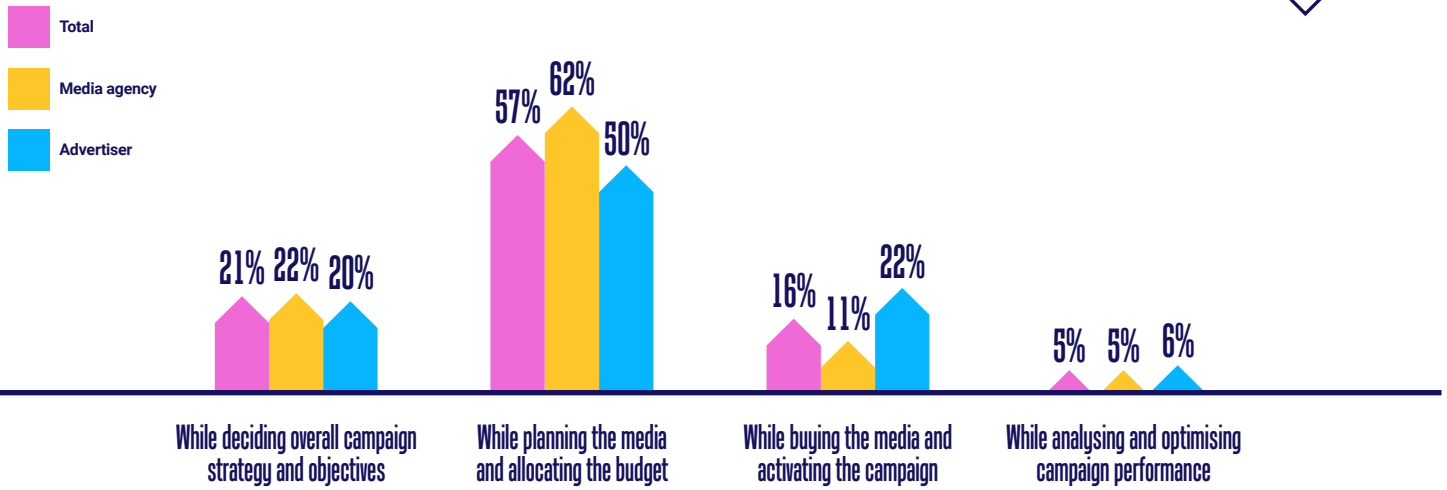




Demonstrating the importance of an omni-channel strategy, 78% of UK media professionals make the decision to include programmatic DOOH during the early stages of the campaign planning and activation process, with **21% deciding to include it during the campaign ideation/strategising phase (vs 25% globally)**, and **57% while planning the media and allocation of budgets (vs 49% globally)**.



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



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 (203) agency (109) advertiser (94)



*“You need to be really clear about why and when you should use programmatic, and not just for the sake of it. But ultimately if you can identify where it delivers a point of difference then it should be on the plan”*

Leia Reuter  
Managing Partner OOH, Dentsu UK

**78%**

**OF UK 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.

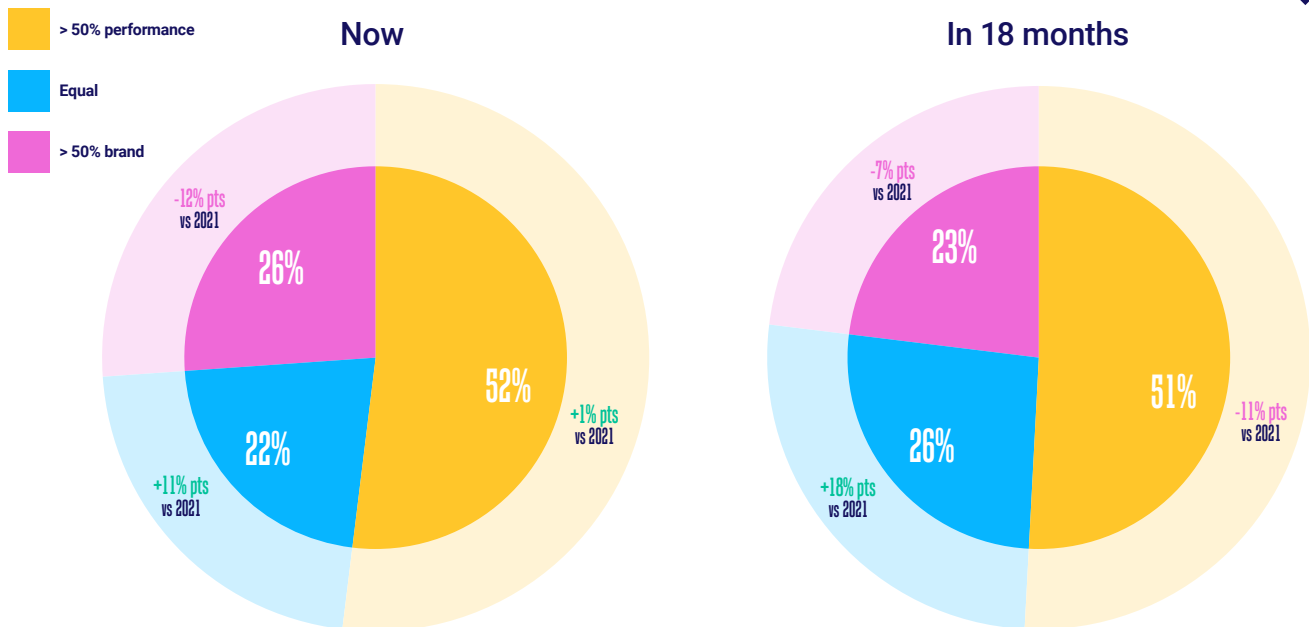
Programmatic is generally considered to have broadened DOOH's appeal as a hybrid medium, combining the mass-reach of broadcast - conducive to branding and upper funnel activities - with data-driven dynamism, synonymous with digital performance marketing and lower funnel conversions.

Whilst allocation of performance and brand spend on programmatic DOOH is done on a case-by-case basis, more broadly, advertising budgets in the UK and globally currently skew towards performance spend (52% in UK vs 59% globally). **This is expected to continue into 2023, with performance focused campaigns predicted to take just over half (51%) of advertising budgets in the UK**, perhaps unsurprisingly given current uncertainties around the broader economic outlook.



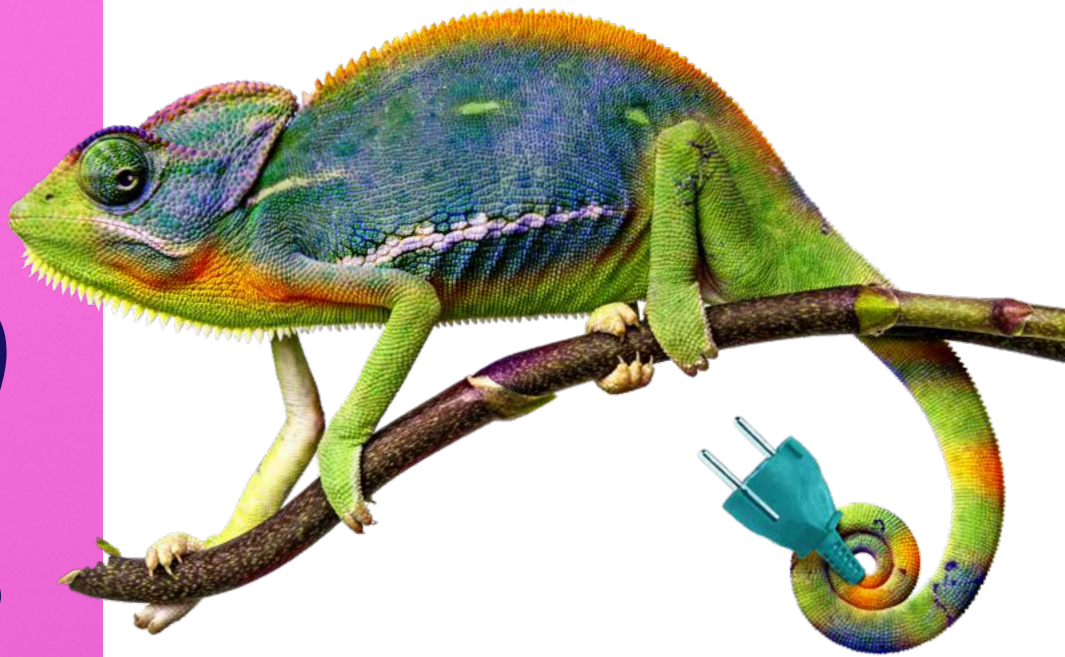
8

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



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 (203)

# Defining the new landscape

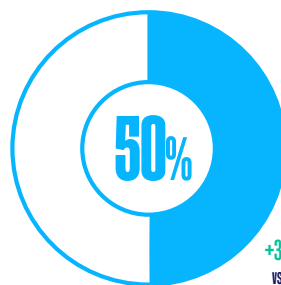


## Expected demand for programmatic DOOH

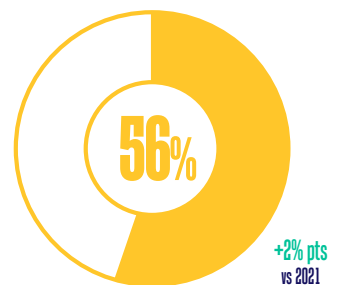
As outlined above, demand for programmatic DOOH is expected to continue to grow. Over half (56%) of campaigns in the UK (vs 57% globally) are expected to include programmatic DOOH over the next 18 months, according to UK media professionals.

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

9



Last 18 months



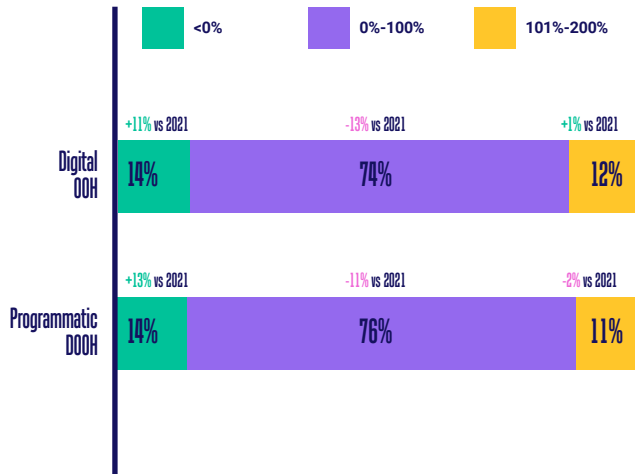
Next 18 months

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 (203)

In addition, **11% (-2% pts vs 2021)** of executives in the UK (vs 19% globally) believe that advertising investment in programmatic DOOH will more than double (101-200%) over the next 18 months.

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

10

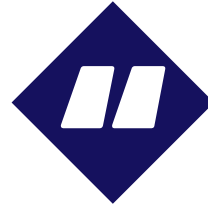


Notes: Source: BB. How do you think your advertising investment in the following media will change in the next 18 months?  
Base size: all respondents (203)

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.

11%

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



*“We see clients understanding more around what the channel can do. We also see greater sophistication in the use of the available tools, whether that be in relation to creative, data, or other areas. People are getting more and more excited about this part of the world and I think this will definitely continue”*

Alys Donnelly  
Head of Programmatic, Kinetic UK

*“We want to go through a period of increased investment in the channel under the context of “test and learn”, to understand what is possible. The growth of programmatic OOH should be determined by successes and failures of those campaigns which are informed by data”*

James Trott  
Head of Product, Matterkind UK (IPG)

*“Programmatic is a great opportunity to reassess how we plan OOH, but we need to aggressively test it and find how much more effective the medium becomes through this channel. As an industry, we need to look at whether the efficiency makes it more effective”*

Leia Reuter  
Managing Partner OOH, Dentsu UK

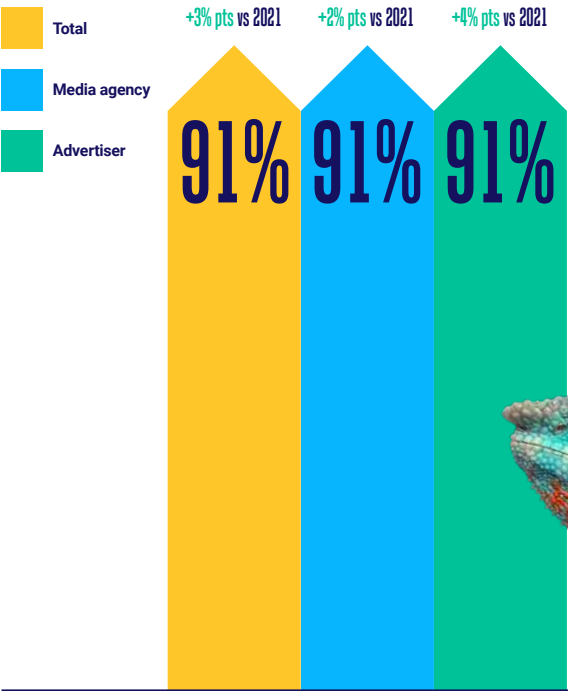


# In-house investment

In line with the expected demand outlined above, 91% (+3% pts vs 2021) of UK media executives (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

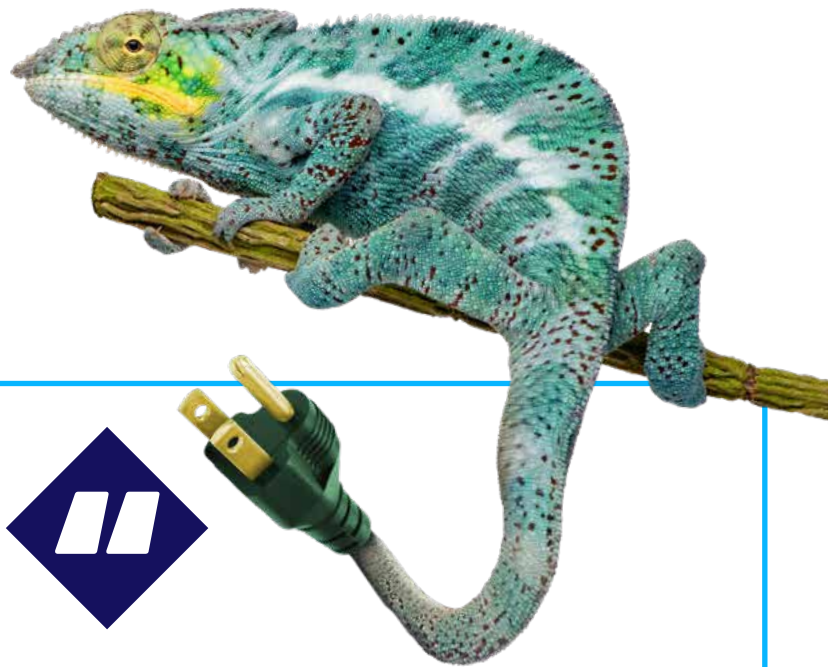
Notes: Source: C10. Thinking about how you expect to place programmatic digital out-of-home advertising in the next 18 months, to what extent do you agree or disagree with the following statement?  
Base size: all respondents (203) agency (109) advertiser (94)



# 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.



*"We've got quite a lot of work to do around educating clients about the opportunities that exist with programmatic OOH. As an industry, we need be focused on providing evidence of the value of these opportunities, and then we can sell that to clients"*

Leia Reuter  
Managing Partner OOH, Dentsu UK

*"We have more proof points on why it's better to activate this way, but more successes to talk about will really help"*

James Trott  
Head of Product, Matterkind UK (IPG)

Central to this education piece is sharing best practices in data activation and providing information on how to measure the ROI of programmatic DOOH campaigns. In line with executives globally, **42% of agency executives in the UK (vs. 45% globally) feel that best practices in using data for programmatic DOOH would help them to better understand the channel**, and 48% of 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.



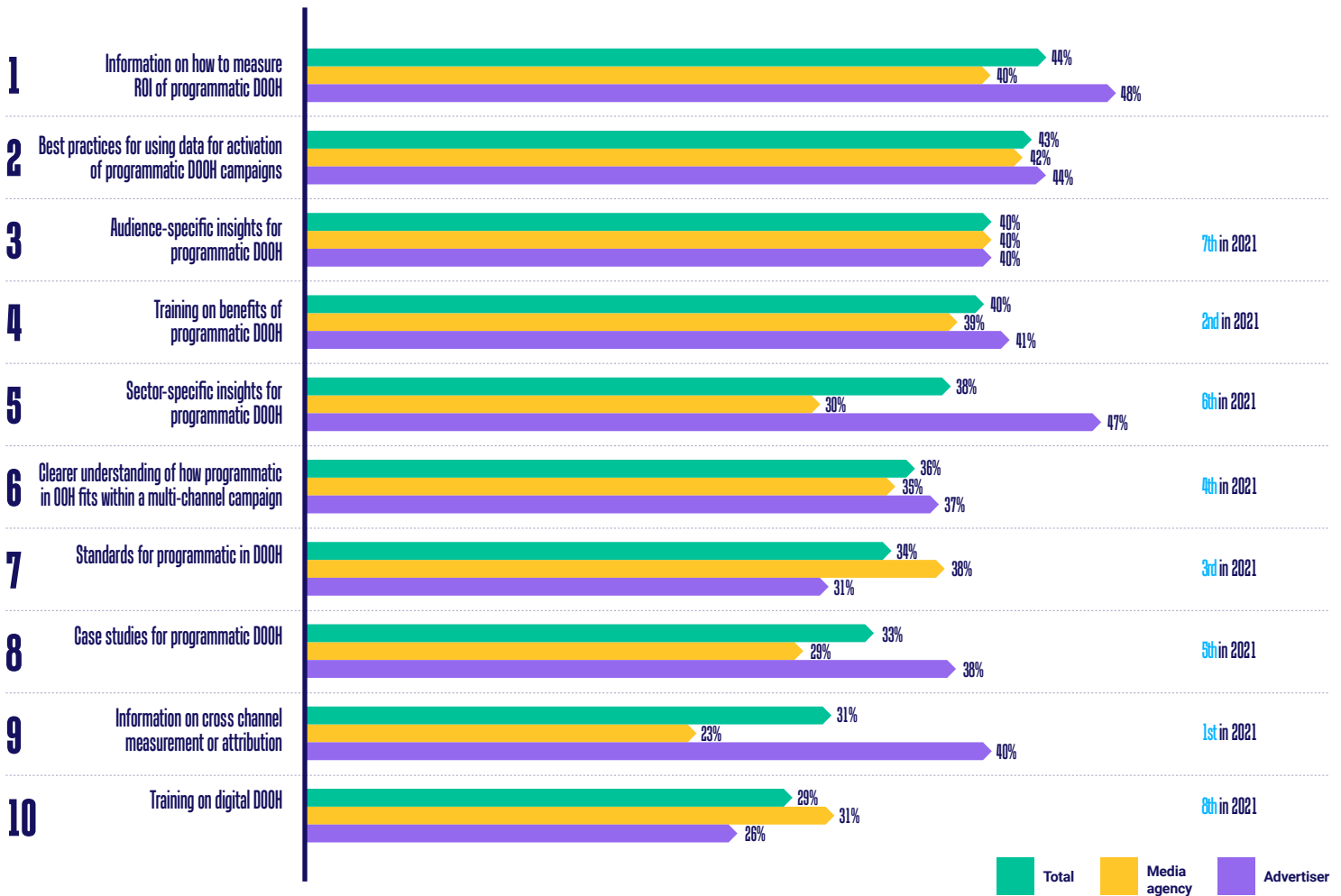
***“I think there is still some further education work that we all need to do in this space around showing how programmatic OOH fits the changing needs of brands and delivers value in these areas”***

Alys Donnelly  
Head of Programmatic, Kinetic UK

**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 (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 UK 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.



*“Cross channel attribution is unbelievably hard. In terms of conversion, you know that they have been hit by OOH, exposed to search and social, but understanding the value that each one has to conversion, it’s incredibly difficult”*

James Trott  
Head of Product, Matterkind UK (IPG)

*“In an econometric model it is often difficult to measure the impact of DOOH, especially when you are buying lighter weight campaigns. We need to find a way to prove the impact programmatic DOOH has at a local level”*

Leia Reuter  
Managing Partner OOH, Dentsu UK

*“Cross channel attribution is not just an OOH issue, it’s an issue for all channels. There’s still some further work to be done here to ensure each channel is being fairly represented in terms of their contribution to the outcomes of the campaign”*

Alys Donnelly  
Head of Programmatic, Kinetic UK



# 3 Precision targeting and real-time audience data



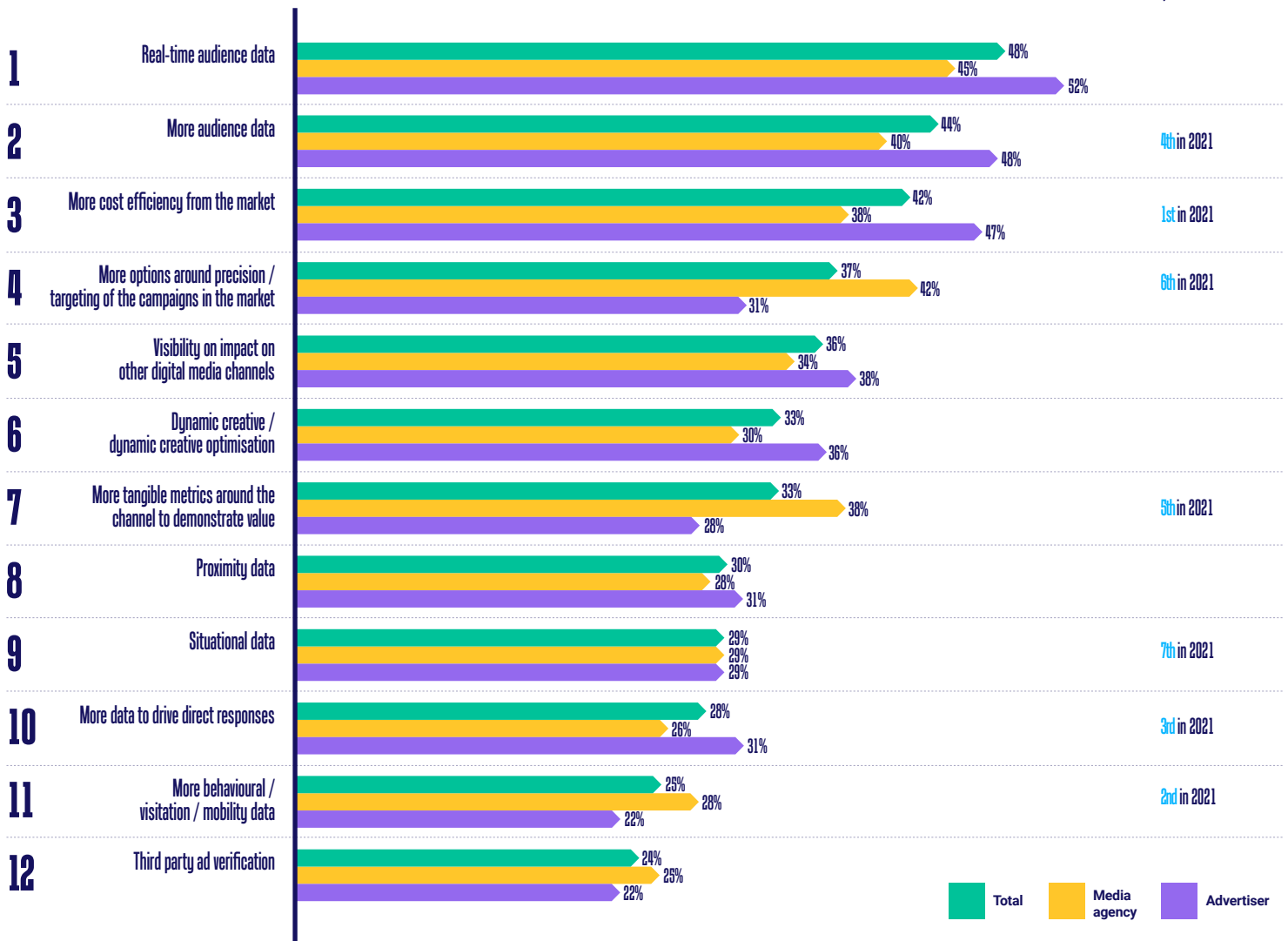
This year, media professionals in the UK and globally identified the provision of real-time data (ranked #1 in UK and globally) as key to improving the value of, and boosting investment in, programmatic DOOH.

In light of the increasing alignment of programmatic DOOH with other programmatic digital channels, it is unsurprising that media executives in the UK and globally 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 efficacy of campaigns. Thus, 44% of executives in the UK and 39% globally believe that a wider scope of audience data would also give programmatic DOOH campaigns 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?

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

13

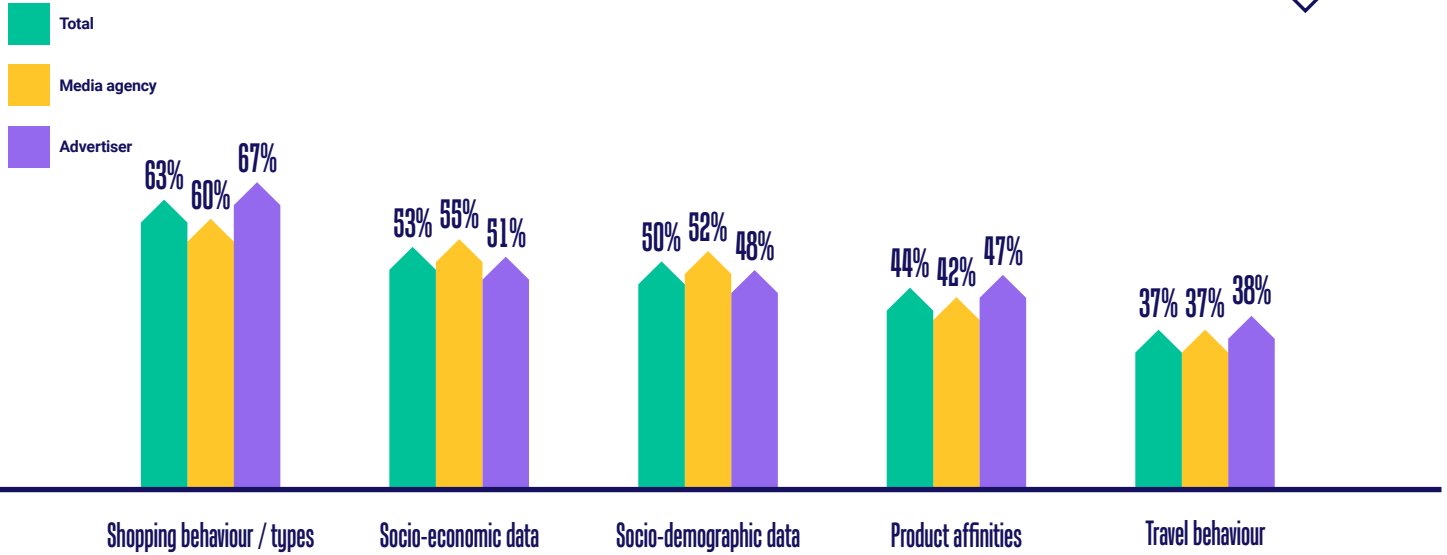


Notes: Source: C6. Which of the following would you like to see in order to give programmatic DOOH campaigns more value and make you invest more?  
Base size all respondents (203) agency (109) advertiser (94)

In terms of types of audience data that advertisers perceive to be most valuable, media executives in the UK say that shopping behaviour (63% in UK vs. 54% globally) and socio-economic (53% in UK vs. 50% 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 (203) agency (109) advertiser (94)



*“Every brief is different so what the emphasis should be in terms of data or execution is going to vary depending on what the client needs at that particular time. It’s a testament to the flexibility of the channel and the way that it has evolved that we can do that”*

Alys Donnelly  
Head of Programmatic, Kinetic UK

63%

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

# Summary



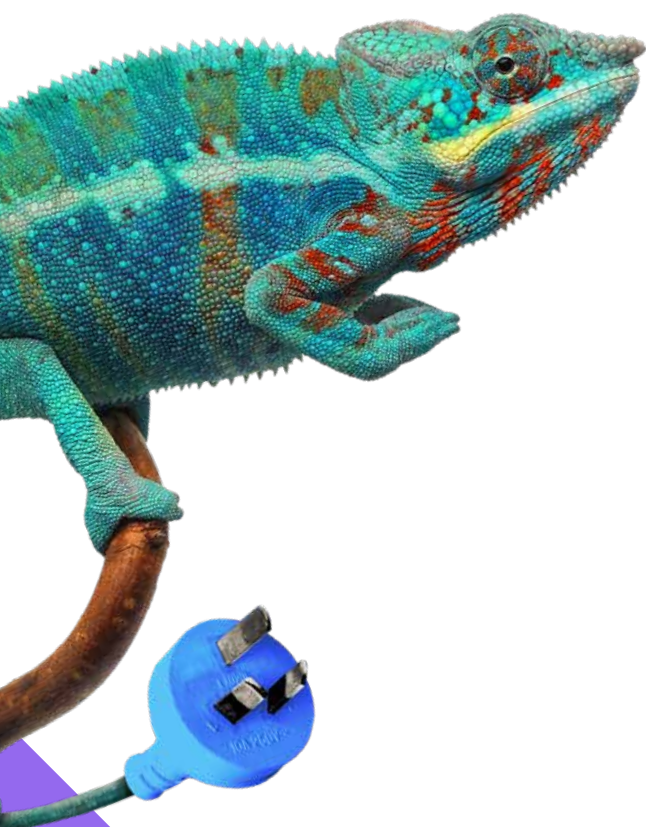
**The results of these surveys from over 1000 media executives globally are clear, showing that the future for programmatic DOOH looks bright. With nearly all (87%) UK media professionals (vs 94% globally) surveyed set to retain or increase investment in the channel, demand is expected to continue, and grow, over the next 18 months.**

In response to the predicted surge in demand from clients across all sectors, UK 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 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.

In addition, challenging economic conditions may prompt advertisers to be more discerning with their budgets, with many likely to prioritise cost efficiency when investing in advertising channels. In this way, minimising wastage through programmatic activation is likely to become an increasingly important factor influencing spend increases in programmatic DOOH.

# ***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 expected to persist as a key driver of programmatic DOOH adoption in the UK, with the potential to overlay real-time audience data to inform activation, an exciting prospect for many.

As advertisers in the UK 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 video, 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 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 best practices in data activation will improve the value of programmatic DOOH campaigns and enable UK executives to educate clients and colleagues on how data can be employed to realise a significant ROI using programmatic DOOH.