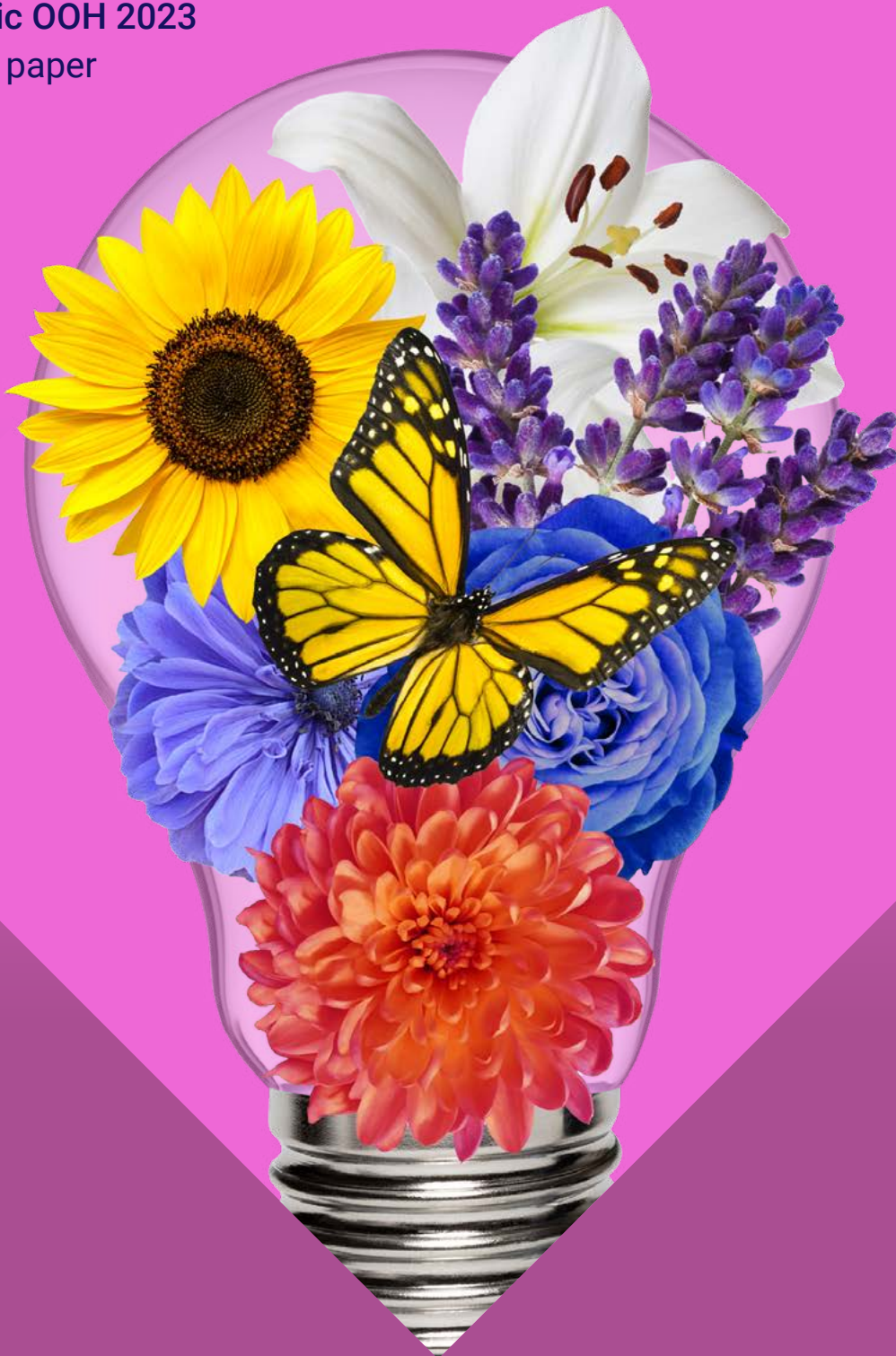


State of the Nation

Programmatic OOH 2023
France white paper



EXECUTIVE SUMMARY



- ◆ France exhibits a **high adoption of programmatic digital out-of-home** (prDOOH).
- ◆ **Growth is set to continue**, with the vast majority of French survey respondents saying that they will increase spend in the next 18 months, by nearly a third on average.
- ◆ French advertisers are more likely than those in any other market to **reallocate budgets from other digital channels to prDOOH**, and to create new budgets for prDOOH.
- ◆ French advertisers surveyed **believe that prDOOH offers the most innovative and exciting opportunities** in the market in 2023.
- ◆ French advertisers **use prDOOH for both brand awareness and performance objectives**. However, they are increasingly using prDOOH for performance marketing, as it offers a unique opportunity to reach consumers at scale and drive measurable results.
- ◆ **Providing training and resources** to a broad range of stakeholders about the value of prDOOH, as well as clear standards for prDOOH will help to increase adoption in France.



VIOOH partnered with research and strategy agency, MTM, to survey 1,200 advertisers and agencies across the US, UK, Australia, Germany, France, and Spain to learn about the current state of the nation of programmatic digital out-of-home (prDOOH) advertising.

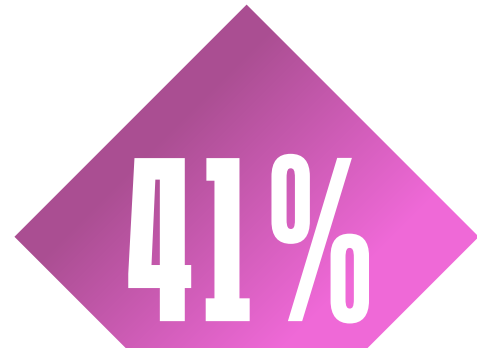
Participants in this research have already purchased prDOOH in the past 12 months, plan to purchase it in the next 12 months or are digital buyers open to purchasing it.

This report covers the highlights of the French market. The full global report can be [found here](#).

WHAT IS THE CURRENT STATE OF THE NATION OF PROGRAMMATIC DIGITAL OUT-OF-HOME IN FRANCE?



Programmatic digital out-of-home (prDOOH) is very popular amongst advertisers in France. Survey results show that out of the campaigns French advertisers have worked on in the past 12-18 months, on average nearly a third (32%) have included prDOOH in the media plan¹. This positive outlook is set to continue, with the average increasing to 41% of media plans likely to include prDOOH in the next 18 months².



ON AVERAGE, ADVERTISERS WILL **INCLUDE prDOOH** IN 41% OF MEDIA PLANS IN THE NEXT 18 MONTHS

1. C10: Think of the campaigns you've worked on in the past 18 months, for what proportion have you placed, planned, or bought programmatic digital out-of-home advertising?
2. C11: Now think of the campaigns you'll be working on in the next 18 months, for what proportion do you think you will place, plan, or buy programmatic digital out-of-home advertising?





30%

FRENCH ADVERTISERS PLAN TO **INCREASE SPEND** IN PROGRAMMATIC DIGITAL OUT-OF-HOME BY AN AVERAGE OF 30% OVER THE NEXT 18 MONTHS

Programmatic DOOH still has room to grow though, as many digital out-of-home campaigns are still purchased directly. Currently, 50% of French advertisers usually or always purchase their DOOH campaigns through direct buys only, followed by 37% who say they usually or always use a mix of both direct buys and programmatic buys³.

Survey respondents in France suggest that they plan to continue placing spend on prDOOH, and in the vast majority of cases, this means increasing spend (by an average of 30% over the next 18 months)⁴.



3. B11: In the past 12 months, how have your digital out-of-home campaigns typically been bought?
4. B7: How do you think your advertising investment in the following media will change in the next 18 months?

WHAT IS FUELLING THE GROWTH OF PROGRAMMATIC DIGITAL OUT-OF-HOME IN FRANCE?



DOOH has long been an attractive advertising tool for French advertisers, thanks to the country's high population density in urban areas. DOOH offers a unique ability to reach large swathes of people.

The market for DOOH is showing strong growth, and is expected to reach \$387.6m in 2023, with an annual growth rate of 6% from 2022⁵. As a result, France has seen a rapid expansion of DOOH in recent years.

PrDOOH's introduction into the French market has amplified the benefits of DOOH, enabling advertisers to execute highly targeted activations, buy placements in real-time, optimise campaigns in-flight and deliver dynamic and contextually relevant creative, amongst other distinctive advantages. Over half of respondents in France (58%) said they will be making greater use of trigger-based buying in the next 18 months, allowing them to capitalise on real-time opportunities⁶.

5. <https://www.statista.com/outlook/amo/advertising/out-of-home-advertising/digital-out-of-home-advertising/france>

6. C14: 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 statements?



WE WILL NOW SHOW YOU A LIST OF ATTRIBUTES AND MEDIA TYPES. PLEASE CHOOSE ANY MEDIA YOU FEEL DELIVER AGAINST THESE ATTRIBUTES

prDOOH ◆
DOOH ◆
Traditional OOH ◆



Source: B1 Base size FR (200)

As such, it's no surprise that respondents from the French market (89%) feel that prDOOH offers the most innovative opportunities compared to any other channel included in our survey⁷.

So much so, that as programmatic in DOOH inevitably moves towards becoming the new normal, the majority of budget reallocation is coming from existing DOOH and OOH budgets.

However, over a third of French advertisers surveyed are reallocating budgets from other digital channels (35%) to take advantage of prDOOH's broadcast, cookieless environment, and more than 1 in 10 (16%) are creating new budgets to grow prDOOH, surpassing all other markets in both areas⁸.

“prDOOH budgets are increasing every year, especially now we have the inventory. I expect this to keep growing as data precision improves i.e. the ability to target the right people with the right information in the right location at the right time”

GEOFFREY GALABERT, CHIEF PRODUCT OFFICER, SCREENBASE

7. B6: Which of these media are developing the most innovative opportunities for advertisers?
8. C5: If the budget is going to be increased for programmatic digital out-of-home, where is this budget being moved from?

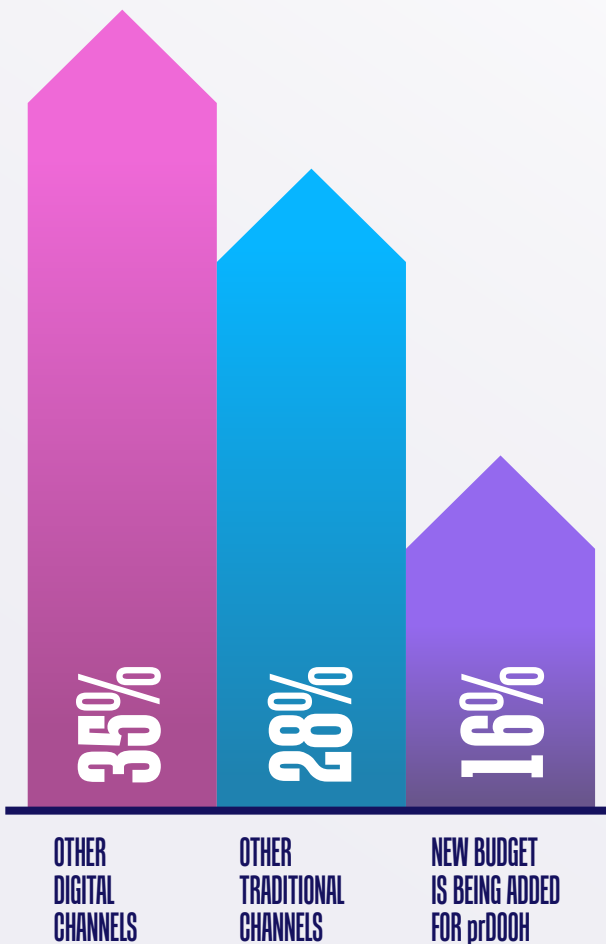
89%

89% OF FRENCH ADVERTISERS SURVEYED BELIEVE THAT PROGRAMMATIC DIGITAL OUT-OF-HOME OFFERS INNOVATIVE OPPORTUNITIES





IF BUDGET IS GOING TO BE INCREASED FOR PROGRAMMATIC DIGITAL OUT-OF-HOME, WHERE IS THIS BUDGET BEING MOVED FROM?



Source: C5 Base size FR (173)

In France, only 10% of main OOH teams are likely to be accessing new budget for prDOOH. However, when buying is diversified, they are more likely to be adding new budget (digital or programmatic team 12%, Managed Service DSP team 14%, dedicated prDOOH team 33%).

PrDOOH is delivering innovation in many different ways, including targeting, creative, and measurement. One of the top innovative benefits recognised in France is new creative opportunities. 64% of respondents believe prDOOH provides new creative features, closely followed by 56% who believe prDOOH delivers innovative ways to target consumers or attribute campaigns⁹.

“Our clients recognise the huge potential of prDOOH. Targeting in specific sites, locations, specific time slots, and the behavioural data that it gives us allows us to put in more innovative solutions. It’s suitable for all sectors”

ISABEL PIRES, HEAD OF OOH, HAVAS MEDIA GROUP

“prDOOH is a fantastic way to reach specific audience targets – being able to add behavioural targeting to the mix really enriches what we can do”

GEOFFREY GALABERT, CHIEF PRODUCT OFFICER, SCREENBASE

9. D3: To what extent do you agree or disagree with the following statements about programmatic digital out-of-home advertising?



HOW IS PROGRAMMATIC DIGITAL OUT-OF-HOME TYPICALLY BOUGHT IN FRANCE AND WHERE DOES IT SIT ON A MEDIA PLAN?



France has a well-established and mature OOH advertising market. Traditional OOH formats have been prevalent in France for many years, and as a result, many advertisers and agencies are accustomed to planning and executing OOH campaigns. As such, prDOOH is commonly integrated into broader OOH campaigns (71%), though French advertisers are also open to running stand-alone prDOOH campaigns¹⁰.

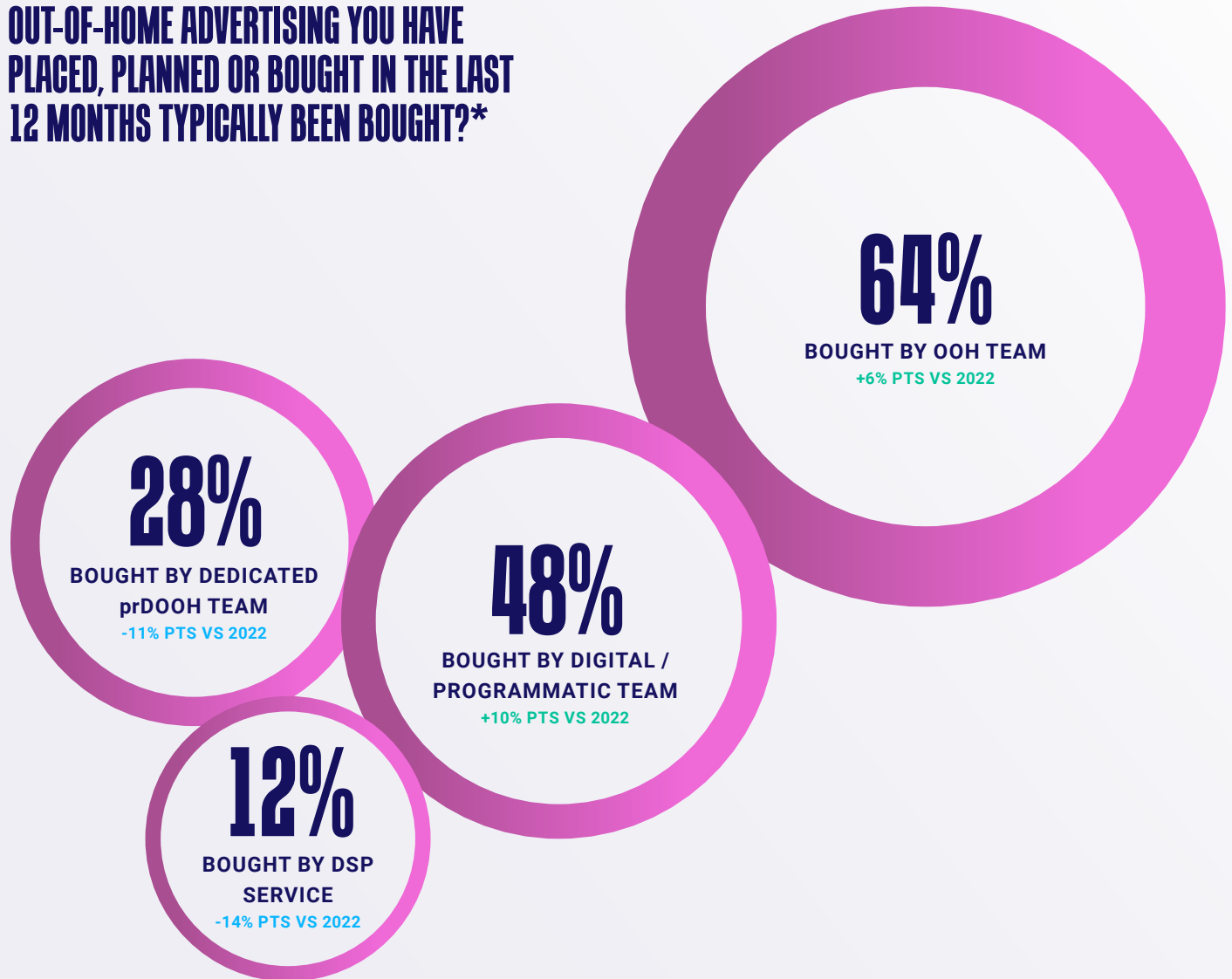
“Sometimes it’s the client who dictates the types of campaigns we run. Recently a client wanted their whole campaign to be 100% programmatic. If there hadn’t been a programmatic option for OOH, then this wouldn’t have been on the campaign”

ISABEL PIRES, HEAD OF OOH, HAVAS MEDIA GROUP



10. C2: How has the programmatic digital out-of-home advertising you have placed, planned or bought in the last 12 months typically been planned?

HOW HAS THE PROGRAMMATIC DIGITAL OUT-OF-HOME ADVERTISING YOU HAVE PLACED, PLANNED OR BOUGHT IN THE LAST 12 MONTHS TYPICALLY BEEN BOUGHT?*



*Please note percentages in graph do not equal 100% due to participants being able to select more than one answer, allowing for overlap of responses

Source: C3 Base size FR (177)

This also extends to buying responsibilities, with survey respondents from France indicating that OOH teams oversee prDOOH buys in the majority of cases (64%), though some buying occurs through dedicated digital/programmatic teams (48%), up 10% pts versus 2022¹¹.

Survey results also suggest that French advertisers take advantage of the speed to market that is afforded through programmatic buying, a key benefit of prDOOH. **And whilst prDOOH is typically added to a media plan in France during a campaign's planning and budget allocation phase (48%), just over a third of French advertisers surveyed (35%) decide to include prDOOH on a plan when buying the media and activating the campaign, up from 22% in 2022, suggesting that advertisers are taking advantage of the last-minute flexibility afforded by programmatic DOOH¹².**

11. C3: How has the programmatic digital out-of-home advertising you have placed, planned or bought in the last 12 months typically been bought?

12. C12: While planning a campaign, when in the media planning process is the decision to include programmatic digital out-of-home typically happening?

89% OF FRENCH ADVERTISERS SURVEYED BELIEVE THAT PROGRAMMATIC DIGITAL OUT-OF-HOME IS IMPORTANT FOR PERFORMANCE-LED CAMPAIGNS

89%

PrDOOH marries the broadcast format of DOOH with the hyper-targeted capabilities afforded by programmatic buying. This means that the medium can be leveraged for both performance and brand-led objectives, depending on the specific requirements of a campaign.

French advertisers capitalise on this duality and utilise prDOOH in both performance and branding contexts. Among all the markets surveyed, and alongside Spain, France exhibited the highest percentage (80%) of advertisers who consider prDOOH important for brand-led campaigns¹³. Perhaps more interestingly, a larger proportion of French advertisers (89%) emphasise the importance of prDOOH for performance-led campaigns compared to any other channel included in our survey¹⁴.

Over time, media professionals in France have seen prDOOH as more of a performance-led activity. Previously, prDOOH ranked fourth among other channels as important for performance-led campaigns in 2021; now it ranks first. The opposite trend is happening for brand-led campaigns – it used to rank second in 2022 and now it ranks fourth.

French advertisers consider display advertising to be a natural fit to complement prDOOH in both brand (81%) and performance (79%) campaigns. Furthermore, the vast majority (84%) of French advertisers surveyed say they would buy social media alongside prDOOH in a brand-based activation, whilst a marginally lower proportion (76%) say they would use digital video as a complement to prDOOH in a performance-based campaign¹⁵.

This is unsurprising given the broad reach that social media, display and prDOOH can deliver, making them a powerful combination to maximise the reach and frequency of a brand's campaign messaging.



13. B5: What channels do you see as important for brand-led campaigns?

14. B4: What channels do you see as important for performance-led campaigns?

15. D2: Thinking about brand-led campaigns, which channels would you consider running programmatic digital out-of-home alongside?

WHAT CHALLENGES DO ADVERTISERS IN FRANCE NEED TO OVERCOME IN ORDER TO UNLOCK THE FULL POTENTIAL OF PROGRAMMATIC DIGITAL OUT-OF-HOME?



Survey respondents from France recognise that there is still room for further education across wider agency teams and cross-channel planning desks.

Some OOH agency teams are not yet comfortable with programmatic buying, and others do not have a clear understanding of the unique benefits that prDOOH can provide. In addition, a number of French advertisers surveyed are facing challenges in proving the value of prDOOH to justify its higher price.

As a result, a majority of survey respondents from France (66%) say they want to invest in educating their teams about prDOOH and its benefits, and to receive training on DOOH (48%)^{16/17}. This will help them to determine the channel's true value and better understand how prDOOH can be leveraged to enhance their existing and future campaigns.



16. C14: 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 statements?

17. D4: Which, out of the following, would help you learn more about programmatic digital out-of-home advertising?



“Currently it can be difficult to get buy-in from cross-channel planning desks for programmatic digital out-of-home as there are lots of different environments to account for (e.g. train stations vs. airports), and there are no common metrics for measurement”

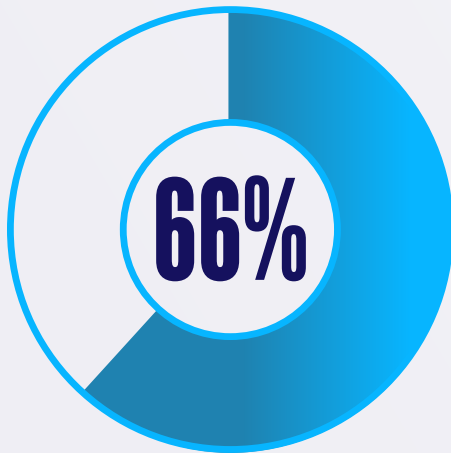
ISABEL PIRES, HEAD OF OOH, HAVAS MEDIA GROUP

“The better the data, the more targeted we can be with our audience and messaging e.g. reliably directing the right shopper target to the right store location based on screen location”

GEOFFREY GALABERT, CHIEF PRODUCT OFFICER, SCREENBASE

THINKING ABOUT HOW YOU EXPECT TO PLACE, PLAN OR BUY PROGRAMMATIC DIGITAL OUT-OF-HOME ADVERTISING IN THE NEXT 18 MONTHS, TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS?

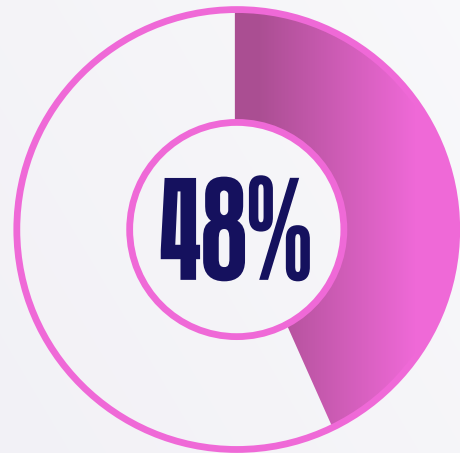
WE WILL INVEST IN BUILDING OUR PROGRAMMATIC DIGITAL OUT-OF-HOME EXPERTISE



% WHO AGREE WITH STATEMENT

WHICH, OUT OF THE FOLLOWING, WOULD HELP YOU LEARN MORE ABOUT PROGRAMMATIC DIGITAL OUT-OF-HOME ADVERTISING?

TRAINING ON DOOH



% WHO AGREE WITH STATEMENT

Source: C14/D4 Base size FR (200)

For more insights and to understand how France compares in the global prDOOH landscape, access the [VIOOH State of the Nation 2023 Global White paper](#).

SAMPLE PROFILE

VIOOH partnered with research and strategy agency, MTM, to survey 1,200 advertisers and agencies across the US, UK, Australia, Germany, France, and Spain. Participants in this research are either joint or sole decision maker for advertising within their business, work at an agency or advertisers; and have already purchased prDOOH in the past 12 months, are planning to purchase it in the next 12 months or are digital buyers open to purchasing it.

Below is a breakdown of French participants based on various factors.

PLEASE ESTIMATE YOUR ORGANISATION'S ANNUAL ADVERTISING BUDGET / BILLINGS AS OF 1ST JANUARY 2023



Under €1m



Between €1m and €5m



Between €5m and €20m

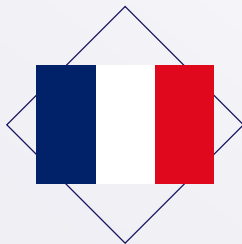


Between €20m and €150m



Over €150m

WHAT COUNTRY DO YOU WORK IN?

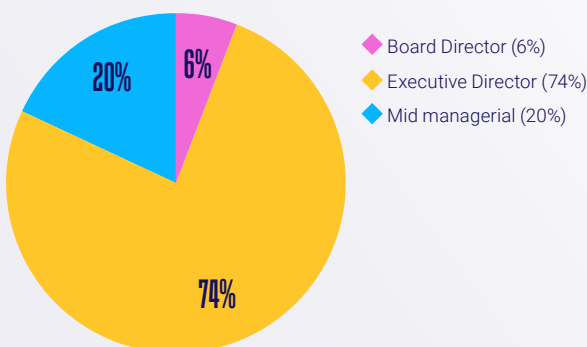


N=200

WHICH OF THE FOLLOWING BEST DESCRIBES THE SECTOR YOUR COMPANY / YOUR BIGGEST CLIENT IS IN?

Sector Net	Percentage
Retail, luxury, clothing, FMCG	31%
Finance, advertising, consulting	17%
Food, drink, hospitality	16%
Automotive, transport	12%
Academic, gov, non-profit, healthcare	9%
Tech, telco	7%
Entertainment, gambling	6%
Property, utilities	4%

WHICH OF THE FOLLOWING, IF ANY, BEST DESCRIBES YOU?



THINKING ABOUT YOUR ORGANISATION, WHICH ONE OF THE FOLLOWING BEST DESCRIBES IT?

