

State of the Nation

Programmatic DOOH 2023
Global white paper



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INTRODUCTION

Programmatic digital out-of-home (prDOOH) is a rapidly growing buying method that offers advertisers a number of incremental advantages to traditional out-of-home (OOH) advertising, including the use of technology to automate the buying and selling of ad space. This allows advertisers to reach their target audiences more precisely, optimise their campaigns, and measure the results of those campaigns more accurately.

In recent years, advertisers have been increasingly open to taking advantage of the benefits that prDOOH can offer. This trend is likely to continue in the coming years, as programmatic DOOH becomes more widespread and the technology continues to develop.

This white paper, based on the extensive survey of media professionals across six of the largest markets globally, discusses some of the big questions for prDOOH for today and in the future: How will investment levels change for this channel in the future? What are the planning and buying processes of prDOOH? What barriers need to be overcome to facilitate further adoption and growth?





VIOOH partnered with international 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 prDOOH advertising.

Following last year's report, this year the survey also included the fast-growing Spanish market.

Participants in this research 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 .

This report focuses on findings for all six markets. Individual market reports can be [found here](#).

EXECUTIVE SUMMARY



- ◆ Programmatic DOOH continues to be very popular amongst the media professionals surveyed. On average, **nearly a third of all campaigns worked on in the past 12 months have included prDOOH in the media plan.**
- ◆ Growth is set to continue, with the vast majority of media professionals reporting that they will **increase their prDOOH spend in the next 12 months**, by a third on average.
- ◆ Programmatic DOOH has a clear role in marketing plans, satisfying both performance and brand-led objectives, as it offers a unique ability to reach consumers at scale and drive measurable results.
- ◆ Advertisers take advantage of the speed to market that is afforded through programmatic buying. Whilst the majority of budgets for prDOOH are coming from DOOH or traditional OOH budgets, **a significant proportion of advertisers surveyed are re-allocating budgets** from other digital or traditional media, or allocating new budgets for prDOOH.
- ◆ prDOOH is **increasingly becoming part of multi-channel strategies**, with a bigger proportion of digital/programmatic teams being involved in the prDOOH buys.
- ◆ Measurement and education remain key challenges, with sensitivity to cost efficiency a concern in younger markets. This is driven by a need to more deeply understand the additional data needs and flexibility that adds cost, when compared with direct sold DOOH campaigns.



SUSTAINED GROWTH

32%

ON AVERAGE NEARLY A THIRD
(32%) HAVE **INCLUDED prDOOH** IN
MEDIA PLANS

Programmatic DOOH is very popular amongst media executives globally. Survey results show that out of the campaigns advertisers have placed in the past 18 months, on average nearly a third (32%) have included prDOOH in the media plan¹. The same positive outlook is set to continue, with the average percentage of media plans likely to include prDOOH in the next 18 months increasing to 40%. Out of all markets surveyed, advertisers in Australia (43%) and France (41%) plan to include prDOOH campaigns in their media plan more often compared to advertisers in the other markets².

Media agencies and advertisers are in alignment in terms of the proportion of campaigns they have placed / are planning to place that include prDOOH in the media plan. In contrast, more mid-managerial and executive directors (33% / 40%) than board directors (26% / 34%) have planned prDOOH in their media plans in the past 18 months and will continue to do so over 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?

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? / Now think of the campaigns you'll be working on in the next 18 months, for what proportion do you think you place, plan or buy programmatic digital out-of-home advertising?

Campaigns including prDOOH:

◆ Past 18 months ◆ Next 18 months



37% | 43%

AU

31% | 39%

DE

30% | 39%

ES

32% | 41%

FR

31% | 39%

UK

31% | 39%

US

33% | 40%

MID-MANAGERIAL

33% | 40%

EXECUTIVE DIRECTOR

26% | 34%

BOARD DIRECTOR

IN THE PAST 12 MONTHS, HOW HAVE YOUR DIGITAL OUT-OF-HOME CAMPAIGNS TYPICALLY BEEN BOUGHT?

MARKETS	GLOBAL AVERAGE	AU	DE	ES	FR	UK	US
CAMPAIGNS THROUGH DIRECT BUYS ONLY	43%	34%	43%	45%	50%	43%	43%
CAMPAIGNS WITH A MIX OF DIRECT AND PROGRAMMATIC BUYS	34%	32%	36%	31%	37%	38%	32%
CAMPAIGNS THROUGH PROGRAMMATIC BUYS ONLY	30%	35%	33%	24%	28%	30%	28%

Source: B11 Base size: all respondents who buy DOOH or prDOOH Total (1095); USA (187), UK (179), AU (173), FR (185), ES (184), DE (187). Please note verticals do not equal 100% due buying methods separately on a 5-pt scale from 'Never' to 'Always' allowing for overlap of 'Usually/Always' responses.

prDOOH still has room to grow though, as many DOOH campaigns are still purchased directly from the DOOH media owner. Currently, 43% of advertisers globally usually or always purchase their DOOH campaigns through direct buys only, followed by 34% who say they usually or always use a mix of both direct buys and programmatic buys³.

Significantly, 30% of advertisers have usually only bought DOOH programmatically in the past 12 months.

Direct buys are still the most common way of purchasing on a market level as well, with advertisers from France (50%) and Spain (45%) saying that they usually or always purchase campaigns through direct buys. In contrast to other markets, advertisers in Australia are unique in their preference for programmatic buys, with 35% saying they usually or always purchase their campaigns through programmatic buys only.

“The budget for prDOOH will increase, especially as the inventory on DV360 continues to increase across our markets. This will make it a lot easier for our channel managers to convince local teams to buy more”

SYLWIA BARDZIK, GLOBAL DIRECTOR BRAND MEDIA, DELIVERY HERO, GERMANY

“Stakeholders are still grasping the role of Programmatic DOOH media as a channel because they are used to dealing with mobile and online performance channels that are one-to-one, and it took a little while for them to build and adapt their capability. Now, there is definitely more collaboration between client partners, agencies, media suppliers, tech and data partners”

JAMES LAMBERT, HEAD OF SIGHTLINE, PART OF GROUPM NEXUS, AUSTRALIA

“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, FRANCE

3. B11: In the past 12 months, how have your digital out-of-home campaigns typically been bought ?



STRONG APPETITE FOR ADOPTION

prDOOH BUDGETS CONTINUE TO GROW



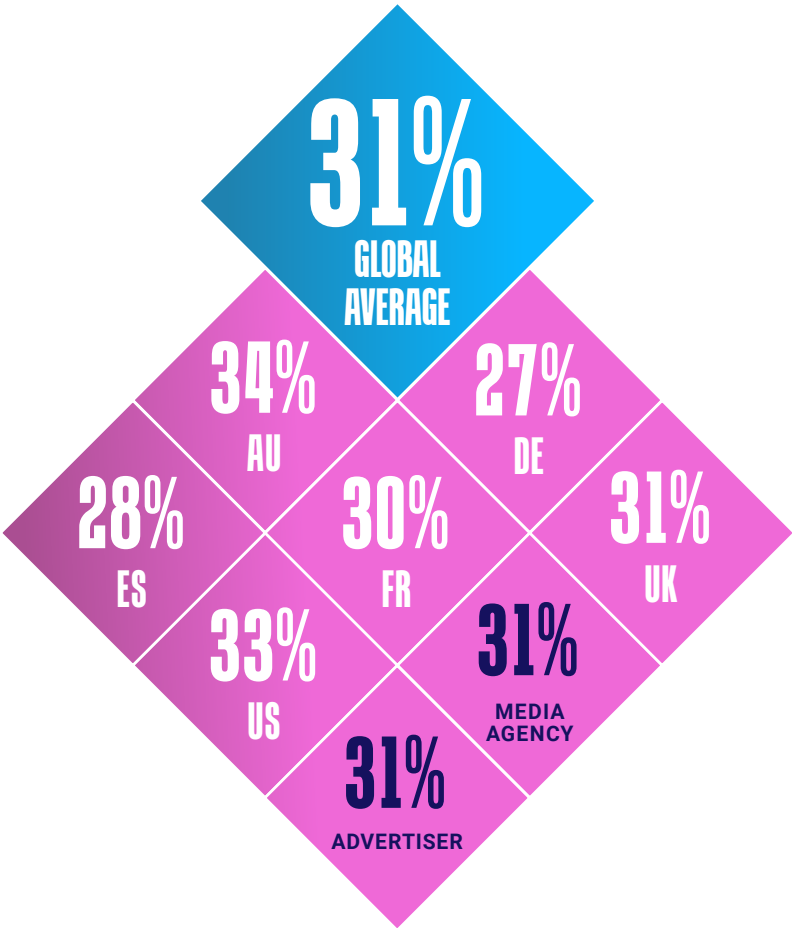
“I think we will see a budget increase in prDOOH over the next years. Establishing a strong connection to our cross-channel solutions is a focus topic and also getting more and more Germany-wide programmatic campaigns with dynamic messaging components”

ROBERT SAGEBAUM, EXPERT LEAD PROGRAMMATIC, GROUPM, GERMANY

Survey respondents suggest that they plan to continue spending on prDOOH, and in the vast majority of cases, this means increasing spend (by an average of 31% over the next 18 months). The Australian advertisers surveyed lead the way, with plans to increase their spend the most (34%)⁴. There is a clear transition towards prDOOH as DOOH and traditional budgets are only set to grow 29% and 20% respectively over the next 18 months.

HOW DO YOU THINK YOUR ADVERTISING INVESTMENT IN THE FOLLOWING MEDIA WILL CHANGE IN THE NEXT 18 MONTHS?

Average % increase in investment in the next 18 months



4. B7: How do you think your advertising investment in the following media will change in the next 18 months?

ADVERTISERS PLAN TO **INCREASE SPEND** IN PROGRAMMATIC DIGITAL OUT-OF-HOME BY AN AVERAGE OF 31% OVER THE NEXT 18 MONTHS



This growth has been facilitated by a considerable increase in the amount of inventory available in recent years, as more and more media owners invest in programmatically enabled screens⁵.

The increase of screens across markets has made prDOOH a viable solution for advertisers looking to achieve highly targeted local or national campaigns. As a result, prDOOH has become particularly popular with advertisers from a wide range of verticals, who consider the ability for generating return on investment (78%), brand effectiveness (78%), good value/ cost efficient (76%), brand safety (66%), audience targeting (63%) important in their decision to invest in prDOOH⁶.

“There feels as though there is a strong appetite in the market for growth in this space. The fact that we can have a full day industry event dedicated to programmatic outdoor pretty well showcases the direction that we’re heading”

SALLY LAWRENCE, MEDIA GROUP DIRECTOR, ENIGMA MEDIA, AUSTRALIA

“Our job as OOH buyers is to ensure that everyone across the network is aware and educated on the capabilities and how to go about planning and buying programmatic”

MARC BARTHOLOMEW, SVP OOH, DENTSU, US

“There is much headroom to grow, and more of the quality DOOH inventory accessible programmatically”

AKAMA DAVIES, VP GLOBAL SOLUTIONS AND OPERATIONS, XAXIS, PART OF GROUP M NEXUS, UK

“We have a lot more clients asking questions about prDOOH, and more clients running pilot tests. We’ve also seen a lot more inventory in the past 12 months which has helped to fuel growth”

SILKE VOLLMANN, OOH, RADIO & CINEMA TRADING DIRECTOR, IPG MAGNA, SPAIN

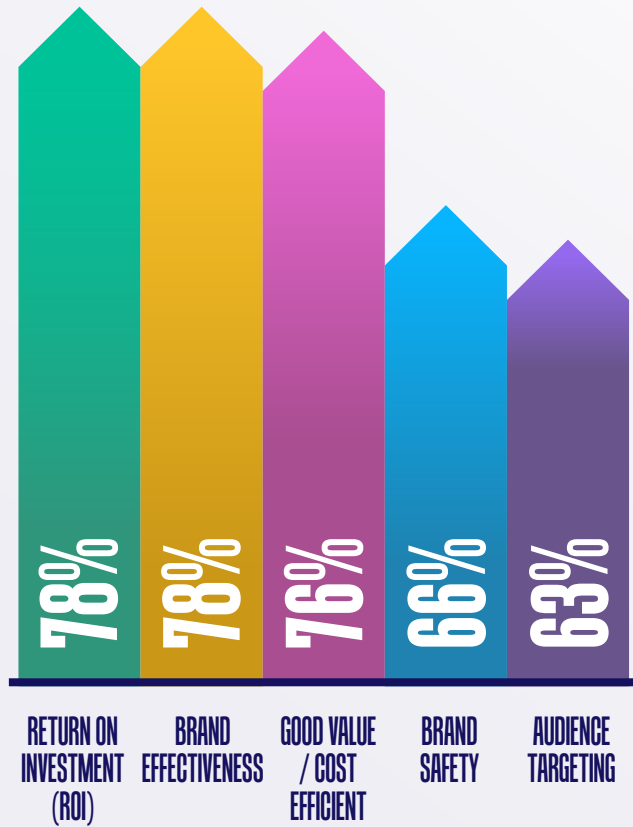


5. Please note that this finding is supported by the qualitative interviews (particularly in the UK, Spain and Australia) and was not asked about in the survey.

6. C13: How important are the following in determining your investment in programmatic digital out-of-home?

HOW IMPORTANT ARE THE FOLLOWING IN DETERMINING YOUR INVESTMENT IN PROGRAMMATIC DIGITAL OUT-OF-HOME?

% VERY/QUITE IMPORTANT



Source: C13 Base size: Total (1200)

Given this backdrop, the budget for prDOOH is predominantly being shifted from DOOH (55%) and traditional OOH (44%). A higher percentage of advertisers in the US (61%) and Spain (66%) are relocating budgets from DOOH to prDOOH than in other markets included in our survey. This is likely due to the fact that programmatic in DOOH will inevitably become the norm, following the trajectory of programmatic adoption in other digital media.

However, a third of advertisers globally are also shifting budgets from other digital channels (33%) to take advantage of the broadcast, cookieless environment of prDOOH, while more than 1 in 10 of advertisers (13%) are creating new budgets for prDOOH – with France leading all other markets in both areas (35% and 16% respectively)⁷.

Globally, only 6% 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 16%, Managed Service DSP team 22%, dedicated prDOOH team 24%).

“We’re seeing budgets for prDOOH come from DOOH budgets, but there are also new budgets being created as well”

RICARDO MOLERO, INVESTMENT & BIDDABLE MEDIA LEAD, PUBLICIS GROUPE, SPAIN

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

	Global Average	AU	DE	ES	FR	UK	US
DOOH	55%	47%	54%	66%	49%	53%	61%
Traditional OOH	44%	45%	49%	48%	45%	37%	39%
Other digital channels	33%	29%	33%	33%	35%	33%	33%
Other traditional channels	27%	28%	29%	28%	28%	24%	24%
New budget is being added for prDOOH	13%	15%	9%	9%	16%	15%	15%

Source: C5 Base size: All respondents increasing prDOOH – Total (1078); US (190); UK (190); AU (185); FR (173); ES (172); DE (168)

7. C5: If the budget is going to be increased for programmatic digital out-of-home, where is this budget being moved from?

HOW DOES prDOOH COMPARE TO TRADITIONAL OOH AND DIRECT DOOH?

The growth of prDOOH in recent years, is in part, facilitated by the innovative opportunities that it has to offer. In fact, 83% of survey respondents believe that prDOOH offers the most innovative opportunities compared to DOOH (79%), display (76%), social media (74%) and any other channel included in our survey⁸.



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



“Consumer research has reflected that prDOOH is perceived as a highly innovative channel due to its rich creative experiences”

AKAMA DAVIES, VP GLOBAL SOLUTIONS AND OPERATIONS,
XAXIS, PART OF GROUP M NEXUS, UK

“With some of our clients, we will proactively propose prDOOH because we think it will be a good fit in terms of targeting and investment possibilities. Other clients ask us to do it because it’s an innovative form of OOH”

SILKE VOLLMANN, OOH, RADIO & CINEMA TRADING DIRECTOR,
IPG MAGNA, ES

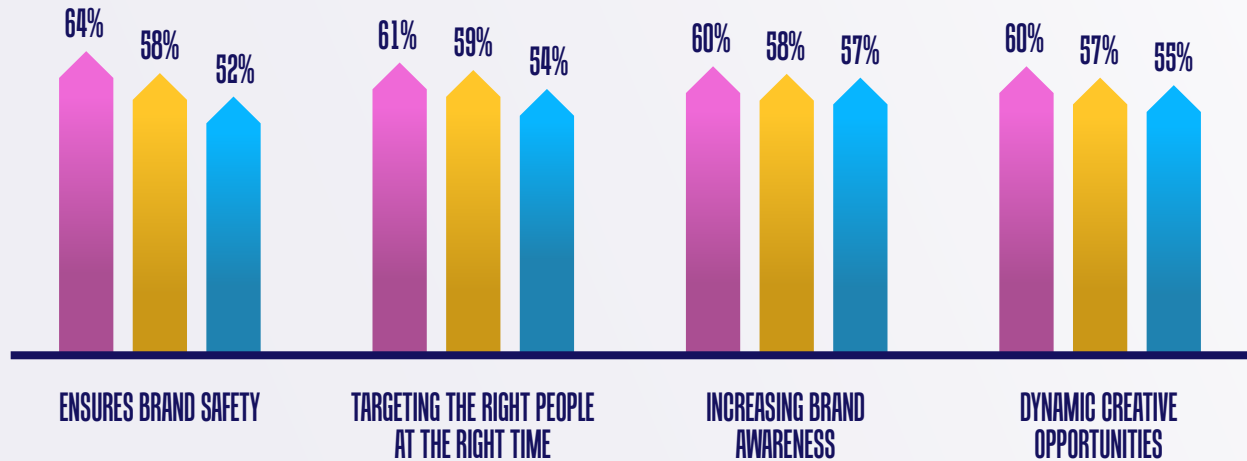
Furthermore, advertisers distinguish prDOOH from traditional OOH and DOOH by its unique benefits. Globally, advertisers believe that out of the three, prDOOH offers distinct advantages such as: ensuring brand safety, including lack of bot/click fraud (64%); targeting the right people at the right time (61%); increasing brand awareness (60%); and providing dynamic creative opportunities (60%)⁹.

8. B6: Which of these media are developing the most innovative opportunities for advertisers?

Channels: Broadcast TV, Connected TV, Traditional Out-of-Home, Radio, Digital audio, Mobile, In-app advertising, Search, Digital video advertising and Print
9. B1: We will now show you a list of attributes and media types. Please choose any of the media you feel deliver against these attributes.

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

◆ prDOOH ◆ DOOH ◆ Traditional OOH



Source: B1 Base size: Total (1200)

As the number of advertisers and agencies adopting prDOOH continues to rise, so does awareness of the distinct advantages it offers. Across markets, advantages of using prDOOH are broadly the same, with some small differentiation: French advertisers believe that prDOOH ensures high quality viewability (65% vs 60% globally), whilst Spanish advertisers believe that it provides dynamic creative opportunities (70% vs 60% globally)¹⁰.

“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, FR

“The flexibility and agility of investment is an often understated [benefit]. Additionally, measuring prDOOH alongside other channels is critically important for that digital profile whenever we speak to those types of clients”

AKAMA DAVIES, VP GLOBAL SOLUTIONS AND OPERATIONS, AXIS, PART OF GROUP M NEXUS, UK

“The programmatic landscape provides flexibility to quickly activate campaigns that utilize contextual relevance and hyper-local targeting at a national scale”

RANDI PESSO, GROUP DIRECTOR, GROUPM, US

¹⁰. B1: We will now show you a list of attributes and media types. Please choose any of the media you feel delivers against these attributes.



KEY ATTRIBUTES OF prDOOH

ADVANTAGES OF USING prDOOH ADVERTISING:



Real-time ad optimisation

- ◆ PrDOOH allows advertisers to optimise their campaigns in real-time
- ◆ By leveraging data and insights, advertisers can adjust their ad creative, targeting and scheduling based on factors such as time of day, weather conditions, nearby audiences and even live events



Enhanced targeting capabilities

- ◆ PrDOOH enables precise targeting based on a range of parameters, including location, time, audience demographics and contextual relevance
- ◆ Data-driven insights can be used to deliver messages to specific audiences at the right time and place, ensuring higher engagement and better ROI



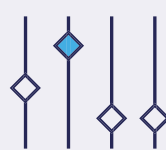
Contextual and dynamic creative

- ◆ PrDOOH enables advertisers to serve dynamic and contextually relevant ad content
- ◆ Advertisers can use data triggers to display tailored messages based on specific conditions or events, such as time of day, weather, proximity to stores and proximity of relevant audiences



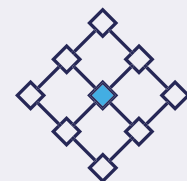
Integration with data ecosystems

- ◆ Data from prDOOH can be integrated into larger data sets that pull from a range of sources including mobile, social, digital video and other online platforms
- ◆ This integration enables advertisers to combine data from across marketing touchpoints to deliver more targeted and personalised campaigns



Measurement and attribution

- ◆ PrDOOH offers more granular measurement and attribution capabilities vs. traditional OOH advertising
- ◆ With prDOOH, advertisers can track and measure core KPIs such as impressions, engagement and conversions, allowing them to evaluate the impact of campaigns and optimise for better results



Cross-channel integration

- ◆ PrDOOH can be integrated with other digital channels such as search, social, video, display etc.
- ◆ This allows advertisers to create cohesive multi-channel campaigns, delivering a consistent and personalised brand experience across multiple different channels

Measurement and attribution is often a topic of conversation for prDOOH as it is not always as straightforward as in one-to-one digital channels.

In our survey, 60% of media professionals see attribution in prDOOH being measured by performance metrics such as sales increase (60%) and impact on website traffic (47%). On a market level, French (46%) and German (42%) advertisers measure attribution in prDOOH by in-flight optimisation, while Australian advertisers measure attribution in prDOOH by increase in performance when planned with other digital channels (49%), more than any other market included in our survey¹¹.

11. D5: How do you see measurement/attribution in programmatic digital out-of-home being measured?

“PrDOOH allows speed to market, but also means we can be more sophisticated with messaging and targeting. We do a lot around moment mapping across customer journeys and prDOOH is often the perfect channel to activate against these moments”

SALLY LAWRENCE, MEDIA GROUP DIRECTOR, ENIGMA MEDIA, AUSTRALIA

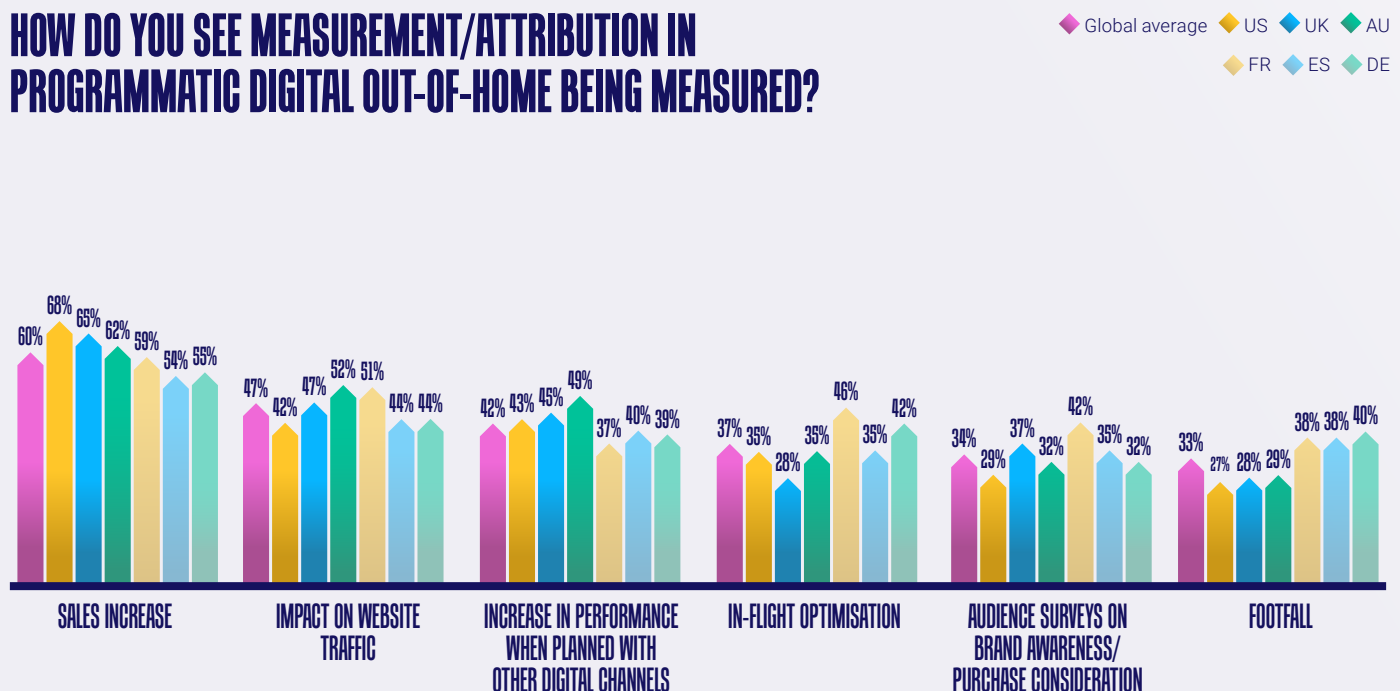
“The programmatic DOOH infrastructure is expanding rapidly, and there is a substantial investment being made on the publisher side. Additionally, we have observed an increasing number of clients using first-party data into their prDOOH campaigns to enhance the overall success. On the creative side, we are telling a really cohesive story across channels”

ROBERT SAGEBAUM, EXPERT LEAD PROGRAMMATIC, GROUPM, GERMANY

“We think about [our clients] in three different ways. Those who want smarter targeting and reach, those who want to go to market with speed, and those who want the flexibility to target key moments, events, stores or to pause the campaign if needed”

MARC BARTHOLOMEW, SVP OOH, DENTSU, US

HOW DO YOU SEE MEASUREMENT/ATTRIBUTION IN PROGRAMMATIC DIGITAL OUT-OF-HOME BEING MEASURED?



Source: D5 Base size: Total (1200); USA (200); UK (200); AU (200); FR (200); ES (200); DE (200)

A CLOSER LOOK AT THE PLANNING AND BUYING PROCESS FOR prDOOH

There is a clear role for prDOOH in media plans, satisfying both performance and brand-led objectives.

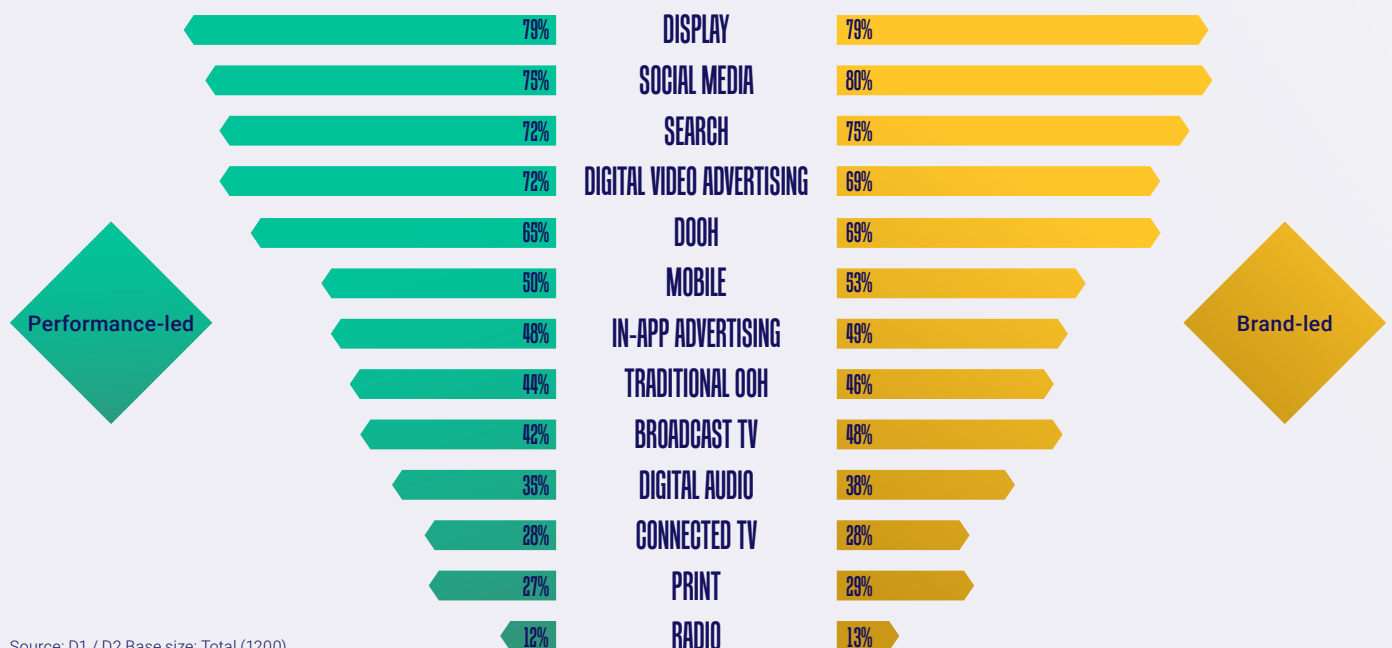
Globally, advertisers plan to prioritise integrating prDOOH more closely in multi-channel campaigns (62% agree). The UK is leading the multi-channel strategy, with seven out of ten (71%) of UK advertisers surveyed planning to prioritise integrating prDOOH more closely in multi-channel campaigns¹².

Survey results also suggest that advertisers leverage prDOOH both in performance and branding contexts, with more than three out of four advertisers indicating that prDOOH is important for both types of campaigns (83% performance-led; 77% brand-led). These findings are consistent across all markets with advertisers believing that prDOOH is more important for performance-led activations, except in the US where advertisers believe that prDOOH is more important for brand-led activations (78%)^{13,14}.

12. C14: 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?

13. B4: What channels do you see as important for performance-led campaigns?
14. B5: What channels do you see as important for brand-led campaigns?

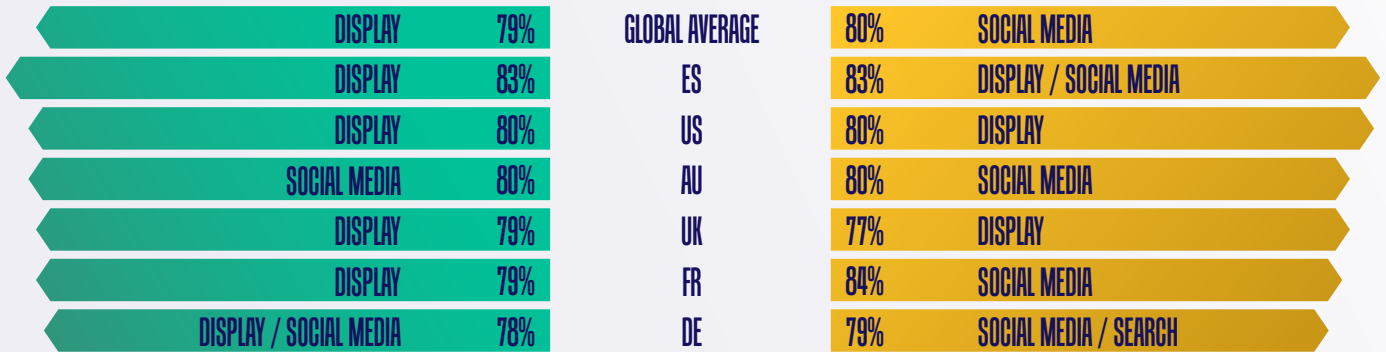
THINKING ABOUT PERFORMANCE-LED / BRAND-LED CAMPAIGNS, WHICH CHANNELS WOULD YOU CONSIDER RUNNING PROGRAMMATIC DIGITAL OUT-OF-HOME ALONGSIDE?



TOP CHANNEL PER MARKET:

◆ Performance-led ◆ Brand-led

Thinking about performance-led / brand-led campaigns, which channels would you consider running programmatic digital out-of-home alongside?



Source: D1 / D2. Base size: USA (200), UK (200), AU (200), FR (200), ES (200), DE (200).

83%

OF ADVERTISERS
SURVEYED BELIEVE THAT
PROGRAMMATIC DIGITAL
OUT-OF-HOME IS IMPORTANT
FOR PERFORMANCE-
LED CAMPAIGNS, WHILE
77% BELIEVE prDOOH IS
**IMPORTANT FOR BRAND-
LED CAMPAIGNS**

“

“As brands lean in more to “brand-formance” approaches, prDOOH can be a good solution for them. We have historically used it in the mid funnel through our moment mapping, and of course it does well at the top of the funnel. For it to really play in the performance layers there would need to be more advancements in the omni-channel and measurement space”

SALLY LAWRENCE, MEDIA GROUP DIRECTOR, ENIGMA MEDIA, AUSTRALIA

“It is the upper-funnel awareness play, though there is this really interesting mid-funnel solution where programmatic out-of-home can play”

MARC BARTHOLOMEW, SVP OOH, DENTSU, US

“It's still more of a branding channel, but it's becoming more performance based and attributable as clients evolve their omni-channel strategies to include DOOH”

JAMES LAMBERT, HEAD OF SIGHTLINE, PART OF GROUPM NEXUS, AUSTRALIA

“Whenever we run any kind of brand activity, there's always some level of objective or output that is still required”

AZAD ALI, PARTNER, DIGITAL CHANNEL MANAGEMENT, MINDSHARE, UK



Furthermore, the vast majority of respondents surveyed would buy display (79%)¹⁵ alongside performance-led activation, while social media is used to complement prDOOH in brand-led activation (80%)¹⁶. This is driven by advertising preferences across the markets, with most of the advertisers believing that display and social media complement prDOOH well in both in both brand-led and performance-led campaigns.

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



“PrDOOH generally always goes together with conventional outdoor, and then is usually always paired with other programmatic channels, such as connected TV, video and display”

RICARDO MOLERO, INVESTMENT & BIDDABLE MEDIA LEAD,
PUBLICIS GROUPE, SPAIN

“[Brands can] have a joined up message across multiple screens, multiple formats, without any kind of loss in synchronicity, instead of waiting for one element to finish. You can manage a campaign across DOOH, digital audio, and display through one DSP”

AZAD ALI, PARTNER, DIGITAL CHANNEL MANAGEMENT,
MINDSHARE, UK

“The technical infrastructure in prDOOH allows the link between different media channels. The goal is to generate multiple contacts to increase the advertising impact and create synergies between prDOOH and e.g. CTV, mobile or social”

ROBERT SAGEBAUM, EXPERT LEAD PROGRAMMATIC,
GROUPM, GERMANY

“You can use the same DSP to run different channels, so you can run prDOOH alongside connected TV, digital display, video, and so on. You can control the frequency of all of those channels, and you have a holistic view that helps you to manage your campaign”

RICARDO MOLERO, INVESTMENT & BIDDABLE MEDIA LEAD,
PUBLICIS GROUPE, SPAIN

15. D1: Thinking about performance-led campaigns, which channels would you consider running programmatic digital out-of-home alongside?

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

VIOOH + Jeep

PROGRAMMATIC
SHOWCASE

Omnichannel campaign with mobile display, digital audio, programmatic DOOH and connected TV

Campaign objective

- ◆ Brand awareness
- ◆ Drive footfall and sales to Jeep dealerships

To increase sales of their hybrid SUV model, the Compass, Jeep and Starcom approached Hawk to run a location-based omnichannel campaign.

Running across JCDcaux, Global and Broadsign screens, the campaign was displayed to audiences within a 5km radius of the top 20 Jeep retailers across the UK.

Users exposed to prDOOH ads were later retargeted with audio and display creatives to maximise the likelihood of visit to a Jeep dealership.



Target audience

Audiences within 5km of 20 selected Jeep dealerships across the UK



Campaign specification

Guaranteed



Inventory

Street furniture in the UK

Campaign results

2,833

visits to all dealerships within 10 days of being exposed to an ad

700

Compass models sold, equating to 50% of annual sales and hitting the client's target for the campaign



A strong case for utilising programmatic DOOH within the media mix, this campaign is a great demonstration that users are more likely to visit a store when primed first with prDOOH and re-targeted with a mobile display ad, rather than running a mobile campaign only.

PLANNING BEHAVIOUR

Traditional OOH formats have been prevalent 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 (72% globally), and even more so in Australia (79%), Germany (77%) and Spain (75%) compared to other markets¹⁷.

This also extends to buying and planning responsibilities, with more than half of survey respondents stating that OOH teams oversee prDOOH buys in the majority of cases (64%)¹⁸. Although planning and buying of prDOOH mostly falls to the OOH team, a significant proportion is also done frequently by programmatic/ digital teams (54%), particularly more so in Germany (60%) than in other markets.

“Our teams are built to plan and buy across all channels. This means we have the right skillset in house as we understand both programmatic and traditional outdoor buying”

SALLY LAWRENCE, MEDIA GROUP DIRECTOR, ENIGMA MEDIA, AUSTRALIA

17. C2: How has the programmatic digital out-of-home advertising you have placed in the last 12 months typically been planned?
18. C3: How has the programmatic digital out-of-home advertising you have placed, planned or bought in the last 12 months typically been bought?

“When we receive a brief, the conventional outdoor team who are planning outdoor media will talk with the programmatic team in order to include our solution on the media plan”

RICARDO MOLERO, INVESTMENT & BIDDABLE MEDIA LEAD, PUBLICIS GROUPE, SPAIN

“The use of prDOOH depends on the campaign goal. We often use prDOOH to complement and enhance traditional OOH campaigns. prDOOH has also been successfully integrated in cross-channel campaigns”

ROBERT SAGEBAUM, EXPERT LEAD PROGRAMMATIC, GROUPM, GERMANY

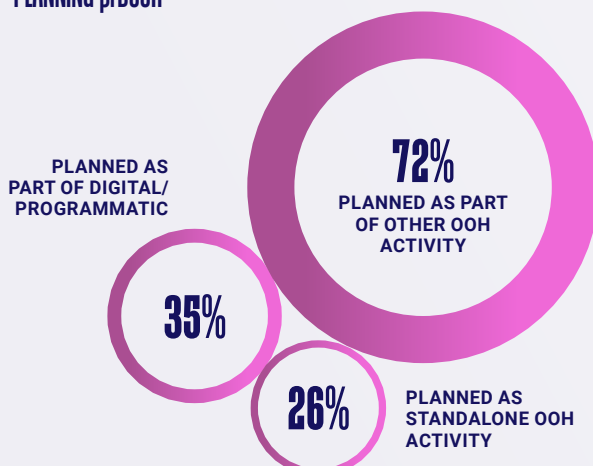
“If we’re doing a big 360 brand campaign we would see prDOOH as part of OOH. If we are doing a tactical campaign, we always prefer to use channels which can be localised, like prDOOH”

SYLVIA BARDZIK, GLOBAL DIRECTOR BRAND MEDIA, DELIVERY HERO, GERMANY

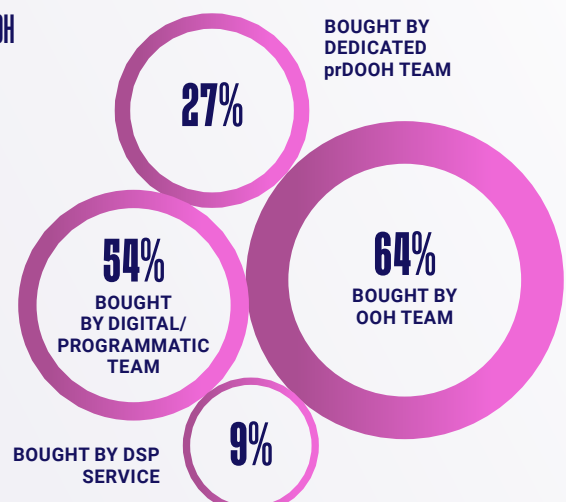
HOW HAS THE PROGRAMMATIC DIGITAL OUT-OF-HOME ADVERTISING YOU HAVE PLACED, PLANNED OR BOUGHT IN THE LAST 12 MONTHS TYPICALLY BEEN PLANNED / BOUGHT?

Source: C2 / C3. Base size: all respondents who place prDOOH Total (1028)

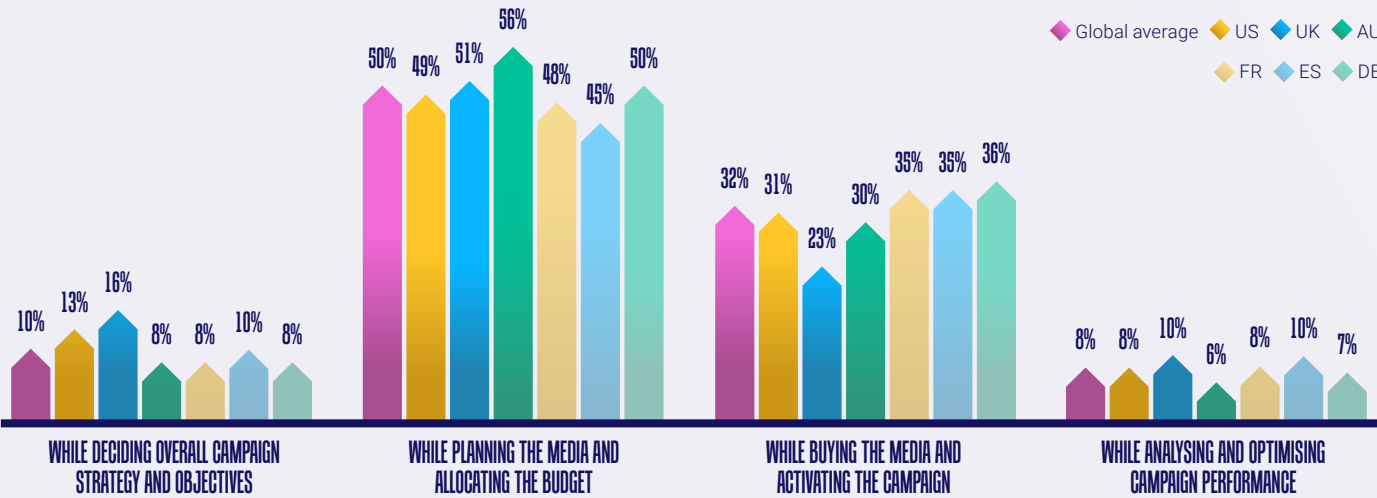
PLANNING prDOOH



BUYING prDOOH



WHILE PLANNING A CAMPAIGN, WHEN IN THE MEDIA PLANNING PROCESS IS THE DECISION TO INCLUDE PROGRAMMATIC DIGITAL OUT-OF-HOME TYPICALLY HAPPENING?



Source: C12. Base size: Total (1200); USA (200), UK (200), AU (200), FR (200), ES (200), DE (200).

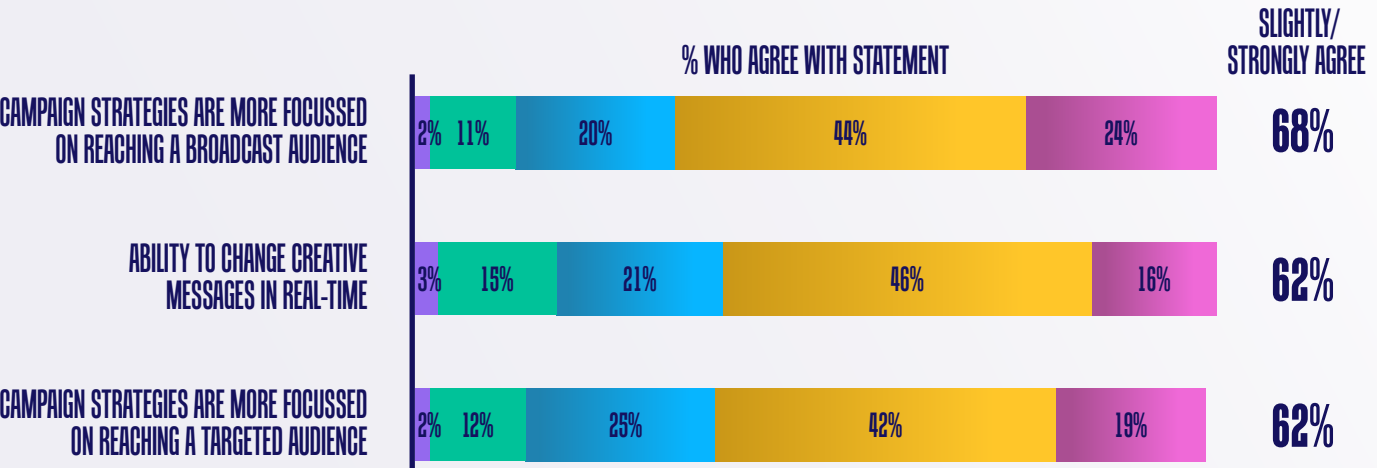
In a similar vein, half of advertisers globally say that the decision to include prDOOH usually happens while planning the media and allocating the budget, with this being the highest for Australia (56%). While prDOOH is typically added to a media plan during a campaign's planning and budget allocation, approximately a third of advertisers in France (35%), Spain (35%) and Germany (36%) are more likely to include prDOOH while buying the media and activating the campaign.

In the UK, advertisers are more likely to include prDOOH while deciding overall campaign strategy and objective than other markets, indicating that including prDOOH is becoming more of a strategic consideration¹⁹.

In terms of planning overall media campaigns, survey results suggest that the flexibility to reach either a broadcast (68%) or target audience (62%), and the ability to change creative message in real time (62%) are most important for advertisers, all aspects that prDOOH is well suited for²⁰.

19: C12: While planning a campaign, when in the media planning process is the decision to include programmatic digital out-of-home typically happening?
20: B9: We now want you to think about the way you plan media. To what extent do you agree or disagree with the following statements?

WE NOW WANT YOU TO THINK ABOUT THE WAY YOU PLAN MEDIA. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS?



Source: B9 Base size: Total (1200)

Legend: Strongly disagree (purple), Slightly disagree (green), Neither agree nor disagree (blue), Slightly agree (yellow), Strongly agree (pink)

BUYING BEHAVIOUR

Programmatic DOOH advertising offers a variety of different avenues for advertisers to purchase ad space.

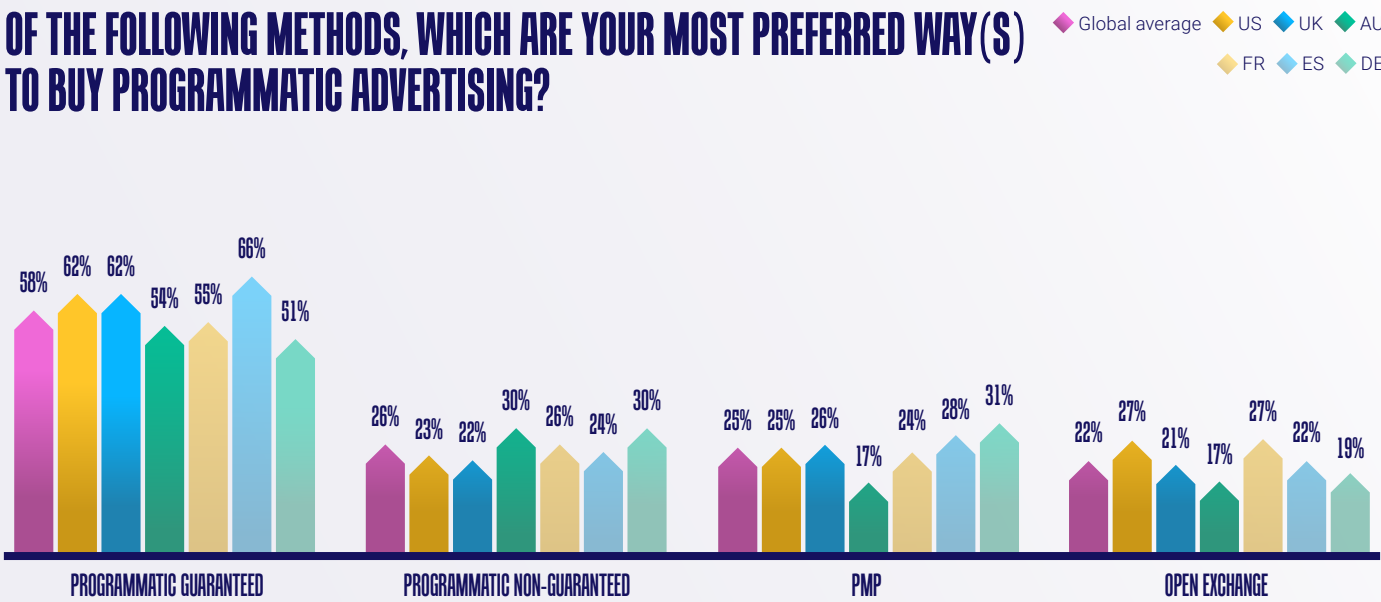
Private marketplace transaction (PMP) Private auctions by invite only, real-time bidding and non-guaranteed volumes	Open exchange Auctions open to all advertisers, real-time bidding and non-guaranteed volumes
Programmatic guaranteed Deals made 1:1 between advertiser and publisher for guaranteed volume at fixed price	Programmatic non-guaranteed Deals made 1:1 between advertiser and publisher at fixed price for preferred access to inventory; volume not guaranteed

Globally, advertisers surveyed prefer to buy prDOOH advertising through programmatic guaranteed deals, with a higher percentage of advertisers doing so in Spain than in other markets (66%)²¹. This suggests that buyers are still seeking the security of guaranteed volumes of ad placements at a fixed price, providing advertisers with more predictability and security of their ad spend, in contrast to how programmatic predominantly operates in other digital channels.

Furthermore, PMPs are more preferred by advertisers in the UK (26%), Spain (28%), and Germany (31%) compared to other countries, whilst open exchange is the second preferred way of buying in France and the US (27%)²².

21. B10: Of the following methods, which are your most preferred way(s) to buy programmatic advertising?
22. B10: Of the following methods, which are your most preferred way(s) to buy programmatic advertising?

OF THE FOLLOWING METHODS, WHICH ARE YOUR MOST PREFERRED WAY(S) TO BUY PROGRAMMATIC ADVERTISING?



Source: B10. Base size: all respondents who buy prDOOH; Total (1195), US (200), UK (200), AU (198), FR (198), ES (200), DE (199)



58%

OF ADVERTISERS SURVEYED
PREFER TO BUY prDOOH THROUGH
PROGRAMMATIC GUARANTEED DEALS

While open exchanges are usually cheaper and more flexible than other methods, they come with more risks due to lack of control and guarantees. Compared to open exchanges, PMPs offer some control and exclusivity while still maintaining the efficiency and dynamic pricing of real-time bidding.

The differences in buying across markets could be due to the maturity and competitiveness of the local DOOH market, local regulations and historical performance of different ways of buying OOH media.

Furthermore, our survey results showed that whilst 57% of prDOOH campaigns that advertisers have worked on in the past 12 months have been single-country campaigns, a significant proportion (43%) have been multi-country campaigns, highlighting the ease of buying programmatically vs. via direct DOOH²³. This finding is consistent across markets as well.

“We have to buy traditional OOH up to eight weeks in advance. With prDOOH, we are guaranteed speed to market, which is a huge benefit to us, especially if we want to run a last minute deal”

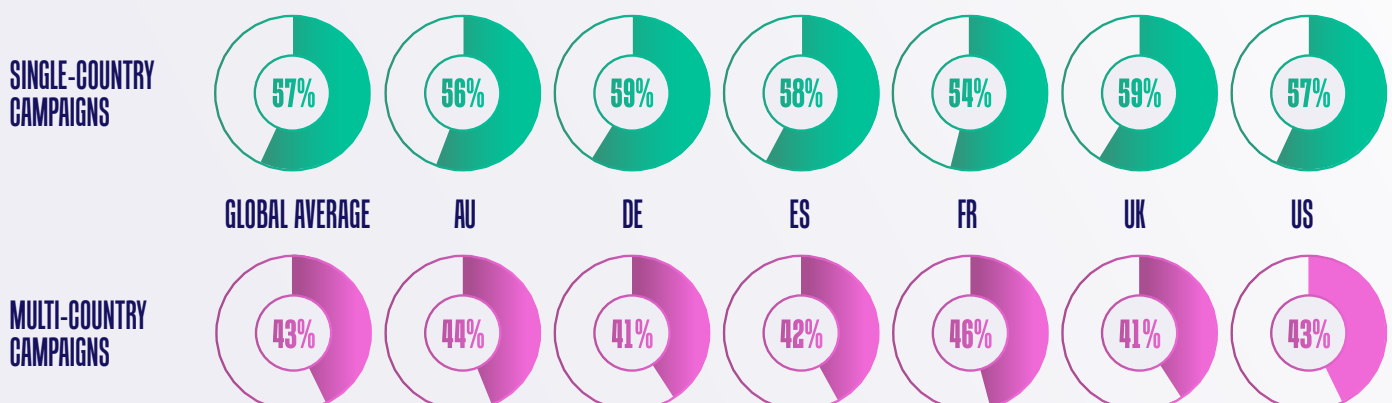
SYLWIA BARDZIK, GLOBAL DIRECTOR BRAND MEDIA,
DELIVERY HERO, GERMANY

“The OOH Investment team has deep knowledge within the programmatic DOOH space. We share the value to our clients so they understand how to incorporate it into their advertising efforts in a way that benefits their business goals”

RANDI PESSO, GROUP DIRECTOR, GROUPM, US

23. C15: Of the programmatic digital out-of-home campaigns you've worked on in the previous 12 months, approximately what percent have been single-country campaigns vs. multi-country campaigns?

OF THE PROGRAMMATIC DIGITAL OUT-OF-HOME CAMPAIGNS YOU'VE WORKED ON IN THE PREVIOUS 12 MONTHS, APPROXIMATELY WHAT PERCENT HAVE BEEN SINGLE-COUNTRY CAMPAIGNS VS. MULTI-COUNTRY CAMPAIGNS?



Source: C15. Base size: all respondents who place prDOOH and work on multi-market campaigns – Total (246); US (51); UK (46); AU (35); FR (34); ES (34); DE (46)

KEY CHALLENGES AND FUTURE OPPORTUNITIES FOR prDOOH

As highlighted in VIOOH's previous prDOOH State of the Nation research, the biggest challenge that advertisers face with prDOOH continues to be the lack of universal standards to measure the value of prDOOH. Without these, advertisers are facing a challenge in demonstrating the return on investment (ROI) and comparing performance across prDOOH campaigns. In addition, a number of advertisers surveyed recognise that there is still room for further education across wider agency teams and cross-channel planning desks. Consequently, advertisers globally plan to continue to invest in building their prDOOH expertise (64%)²⁴.

As much as advertisers want to include prDOOH in multi-channel campaigns, they are still having difficulty determining the value of prDOOH in cross-channel campaigns. In some cases, despite the increased flexibility of prDOOH and the ease of integration alongside other channels, there is also a perceived difficulty in proving the ROI, which is slowing adoption, as advertisers need to understand the value they receive from the channel in order to justify the price premium attached to prDOOH.

Although advertisers have differing opinions whether CPMs are higher or lower on prDOOH, globally, advertisers want more cost efficiency from the market (35%), more options around precision/ targeting of the campaigns (33%), always-on-deals (32%), and more tangible metrics around the channel (32%)²⁵. This will help them to determine the channel's true value and gain better visibility of how prDOOH affects other digital channels.



24. C14: 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?

25. C8: 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?

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?



Source: C8 Base size: Total (1200)

“I would always recommend prDOOH for campaigns with a really niche target, where you can get a better CPM with prDOOH and adapt to the segmentation criteria of the target.”

SILKE VOLLMANN, OOH, RADIO & CINEMA TRADING DIRECTOR, IPG MAGNA, SPAIN

“Outdoor is generally considered a branding media, but because prDOOH is digital, advertisers demand more measurable results.”

RICARDO MOLERO, INVESTMENT & BIDDABLE MEDIA LEAD, PUBLICIS GROUPE, SPAIN

Furthermore, standardisation in KPIs and measurement for prDOOH (48%), best practices for data activation of prDOOH (44%), and information on how to measure ROI (43%) would help advertisers learn more about prDOOH²⁶.

“Typically, the top challenges of prDOOH include which budgets the prDOOH elements come from, getting that hybrid level of expertise across the market, and of course education.”

AKAMA DAVIES, VP GLOBAL SOLUTIONS AND OPERATIONS, XAXIS, PART OF GROUP M NEXUS, UK

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

	Global average	AU	DE	ES	FR	UK	US
1	48% Standards for prDOOH	56% Standards for prDOOH	48% Standards for prDOOH	51% Sector-specific insights for prDOOH	49% Standards for prDOOH	42% Best practices for using data activation	47% Training on DOOH
2	44% Best practices for using data activation	51% Information on how to measure ROI	45% Sector-specific insights for prDOOH	48% Standards for prDOOH	48% Training of DOOH	41% Standards for prDOOH	45% Standards for prDOOH
3	43% Information on how to measure ROI	50% Best practices for using data activation	42% Best practices / Information on ROI	47% Best practices for using data activation	46% Clear understanding on how prDOOH fits in omnichannel campaigns	38% Information on how to measure ROI	44% Clear understanding on how prDOOH fits in omnichannel campaigns

Source: D4. Base size: Total (1200); USA (200), UK (200), AU (200), FR (200), ES (200), DE (200).
26. D4: Which, out of the following, would help you learn more about programmatic digital out-of-home advertising?



Support on cross-channel measurement

- ◆ Better visibility of the impact that prDOOH has on other digital channels (DE)
- ◆ More data to drive DR/cross-channel measurement (US, UK)
- ◆ More options around audience precision / targeting (US, UK, FR, DE)

Better efficiency from the market

To invest more in prDOOH, advertisers want to see:

- ◆ Always-on deals (US, UK)
- ◆ Better cost efficiency from the market (AU, ES, FR)
- ◆ More tangible metrics for prDOOH to demonstrate its value (AU, ES, DE)
- ◆ Information on how to measure ROI (AU)

Educating teams on the value of prDOOH

- ◆ Widespread education is crucial to tackling measurement challenges and ensuring adoption of prDOOH remains high
- ◆ Advertisers say they will invest in building out prDOOH expertise (FR, ES, DE)
- ◆ Advertisers are looking for more training on DOOH (US, FR)

Sector-specific insights and case studies

- ◆ Sector-specific insights for prDOOH (ES, DE)
- ◆ Standards for programmatic buying of DOOH (all markets)
- ◆ Best practices for activation (UK)

Finally, survey results indicate that each market is grappling with unique challenges and tackling these could facilitate growth of prDOOH across different markets.



“We frequently share successful examples and case studies with our clients so they can understand the cumulative growth happening across the space. There are ever-evolving capabilities and advancements, and we want to make sure our partners know how they can be used in ways that benefit their businesses”

RANDI PESSO, GROUP DIRECTOR, GROUPM, US

“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, FRANCE

“Education is the most immediate challenge. The biggest challenge is the ability to prove that programmatic digital out-of-home delivers across the funnel alongside other channels”

MARC BARTHOLOMEW, SVP OOH, DENTSU, US

“Programmatic DOOH means better use of data to activate OOH campaigns: We now have the tools and technology in place to use data to enable dynamic content optimisation, and to utilise consistent data across multiple channels from a planning perspective”

JAMES LAMBERT, HEAD OF SIGHTLINE, PART OF GROUPM NEXUS, AUSTRALIA



CONCLUSION

The profound and growing popularity of prDOOH advertising amongst media professionals underscores its pivotal role in media planning strategies. The results of the survey projected advertisers will increase their spend on prDOOH by nearly one-third (31%) on average in the next 18 months. This positive trajectory is driven by prDOOH's unique capabilities to satisfy both performance and brand-led objectives by reaching consumers on a larger scale.

The rapid speed to market facilitated by programmatic buying further reinforces prDOOH's appeal for advertisers. This growing investment is not only being shifted from DOOH or traditional OOH budgets, but a notable segment of advertisers surveyed are strategically relocating budgets from other digital or traditional media channels, or creating new budgets for prDOOH. With programmatic DOOH becoming more mature and mainstream, media professionals are also increasingly integrating prDOOH into multi-channel strategies, often using it alongside social media and display advertising.

As prDOOH experiences growth, it continues to face persistent challenges related to measurement and education. Particularly in markets where prDOOH is less mature, there is another challenge to educate stakeholders around the reasons behind higher CPMs for prDOOH compared to direct DOOH. This education should emphasise the value derived from data-driven targeting and the increased flexibility offered by prDOOH. Across all the markets surveyed, there is desire for standardisation of KPIs and measurement, best practices for data activation, and information on how to measure ROI in order to help mitigate and solve some of these challenges of prDOOH campaigns.

For more insights and to understand how the different markets compare in the global prDOOH landscape, access the [VIOOH State of the Nation 2023 market white papers](#).

SAMPLE PROFILE

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



Under £/€//\$1m /
\$AU1.5m



Between £/€//\$1m
/ \$AU1.5m and
£/€//\$5m / \$AU7m



Between £/€//\$5m
/ \$AU7m and
£/€//\$20m / \$AU28m



Between £/€//\$20m
/ \$AU28m and
£/€//\$150m /
\$AU200m



Over £/€//\$150m /
\$AU200m

WHAT COUNTRY DO YOU WORK IN?



N=200



N=200



N=200



N=200



N=200

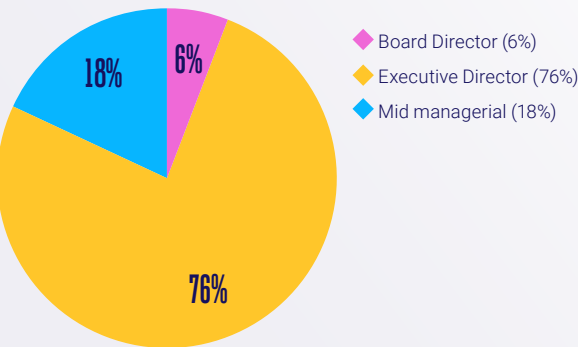


N=200

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

Sector Net	Percentage
Retail, luxury, clothing, FMCG	27%
Finance, advertising, consulting	20%
Food, drink, hospitality	14%
Tech, telco	11%
Academic, gov, non-profit, healthcare	9%
Automotive, transport	9%
Entertainment, gambling	7%
Property, utilities	4%

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



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

