

State of the Nation

Programmatic OOH 2023
Spain white paper



EXECUTIVE SUMMARY



- ◆ Spain exhibits a **high adoption of programmatic digital out-of-home** (prDOOH).
- ◆ **Growth is set to continue**, with the vast majority of Spanish survey respondents saying that they will increase spend in the next 18 months, by nearly a third on average.
- ◆ Whilst Spanish advertisers are diverting budgets from digital out-of-home (DOOH) and traditional OOH to prDOOH, a significant proportion of is being **reallocated from other digital and traditional media budgets**.
- ◆ Spanish advertisers surveyed believe that prDOOH offers the most **innovative and exciting opportunities** in the market in 2023.
- ◆ Spanish advertisers are increasingly **using prDOOH for performance marketing**, as it offers a unique opportunity to reach consumers at scale and drive measurable results.
- ◆ Spanish advertisers want to see **concrete data** that proves the value of prDOOH, and its impact on other marketing channels.
- ◆ **Providing training and resources** to a broad range of stakeholders about the value of programmatic digital out-of-home (prDOOH), as well as sector-specific insights, case studies, and clear standards for prDOOH, will help to increase adoption in Spain.



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 Spanish market. The full global report can be [found here](#).

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



Programmatic digital out-of-home (prDOOH) is very popular amongst advertisers in Spain. Survey results show that out of the campaigns Spanish advertisers have worked on in the past 12-18 months, on average nearly a third (30%) have included prDOOH in the media plan¹. This positive outlook is set to continue, with the average increasing to 39% of media plans likely to include prDOOH in the next 18 months².



ON AVERAGE, ADVERTISERS WILL **INCLUDE prDOOH** IN 39% OF MEDIA PLANS IN THE NEXT 18 MONTHS

Programmatic DOOH still has room to grow. Currently 45% of Spanish advertisers usually or always purchase their DOOH campaigns through direct buys only, followed by 31% who say they usually or always use a mix of both direct buys and programmatic buys³.



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?

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



28%

SPANISH ADVERTISERS PLAN TO **INCREASE SPEND** IN PROGRAMMATIC DIGITAL OUT-OF-HOME BY AN AVERAGE OF 28% OVER THE NEXT 18 MONTHS

“PrDOOH is growing fast in Spain. The main publishers in Spain are investing a lot in digital inventory to grow it, so the number of screens is growing really rapidly as well”

RICARDO MOLERO, INVESTMENT & BIDDABLE MEDIA LEAD,
PUBLICIS GROUPE

Survey respondents in Spain 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 28% over the next 18 months)⁴.

“PrDOOH in Spain really started accelerating in 2021 and 2022, when the major media vendors entered the market and started to add programmatic capabilities to DOOH screens”

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



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 SPAIN?



PrDOOH was introduced into the mainstream Spanish market during the pandemic years (2020-2022) and has since experienced significant growth. Advertisers are keen to test out prDOOH and take advantage of its benefits, including the ability to launch campaigns swiftly, optimise them in real-time, and deliver highly targeted and impactful big-screen ads.

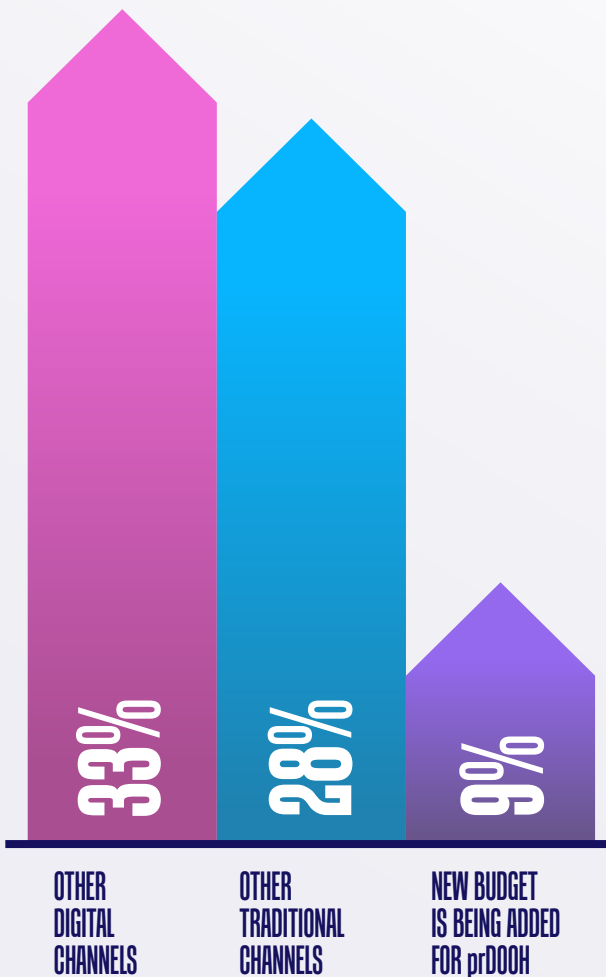
“With some of our clients, we will proactively propose prDOOH because we think it will be a good fit in terms of targeting and investment possibilities. Other clients ask us to do it because it’s an innovative form of OOH”

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



Due to its novelty, prDOOH is often replacing its close cousin DOOH on plans, as programmatic in DOOH inevitably moves towards becoming the new normal, with more advertisers in Spain (66%) reporting they are moving budget from DOOH to prDOOH than in any other market surveyed⁵. **However, a significant percentage of the budget is being moved from other digital channels (33%) and other traditional channels (28%).**

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



Source: C5 Base size ES (172)

“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

In Spain, only 7% 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 (Managed Service DSP team 8%, digital or programmatic team 9%, dedicated prDOOH team 17%).

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 screens.

The proliferation of screens across Spain has made prDOOH a viable solution for advertisers looking to achieve highly targeted local and nationwide campaigns. As a result, prDOOH has become particularly popular with advertisers in automotive and consumer packaged goods (CPG) verticals, who leverage the ability to use a range of signals such as audience proximity, weather, and time of day to deliver contextually relevant content.

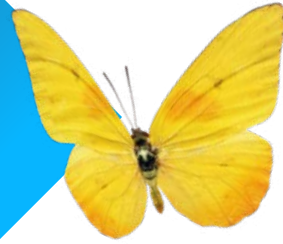
“We see that prDOOH is particularly popular amongst clients in the automotive industry or CPG. We also have new clients for prDOOH that didn’t use outdoor before, but are testing out this new data-driven media”

RICARDO MOLERO, INVESTMENT & BIDDABLE MEDIA LEAD, PUBLICIS GROUPE

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

86% OF SPANISH ADVERTISERS
SURVEYED BELIEVE THAT
PROGRAMMATIC DIGITAL
OUT-OF-HOME **OFFERS**
INNOVATIVE OPPORTUNITIES

86%



As the number of advertisers in Spain adopting prDOOH continues to rise, so does awareness of the distinctive advantages that prDOOH can offer.

“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

“Our clients prefer to buy OOH programmatically because we have the data with programmatic and therefore you are going to reach more relevant people and deliver a bigger impact.”

RICARDO MOLERO, INVESTMENT & BIDDABLE MEDIA LEAD,
PUBLICIS GROUPE

“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

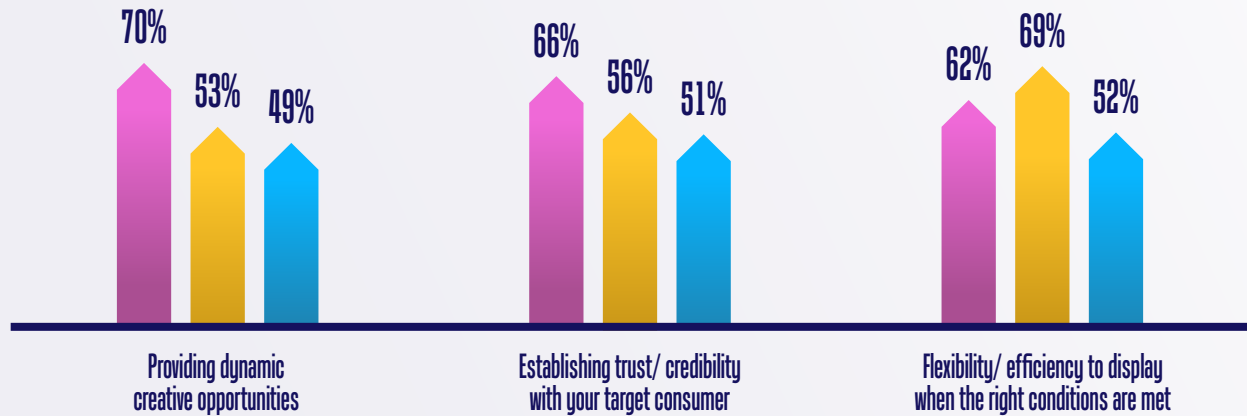
“You can use the same DSP to run different channels, so you can run prDOOH alongside connected TV, digital display, video, and so on. You can control the frequency of all of those channels, and you have a holistic view that helps you to manage your campaign”

RICARDO MOLERO, INVESTMENT & BIDDABLE MEDIA LEAD,
PUBLICIS GROUPE



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 ES (200)

As such, it's no surprise that respondents from the Spanish market feel that prDOOH offers the most innovative opportunities compared to any other channel included in our survey⁶.

Spanish advertisers also particularly value prDOOH's dynamic creative capabilities (70%), the highest percentage of any market⁷. Furthermore, Spanish advertisers believe that prDOOH will be less affected by cookie deprecation than other forms of advertising as it was never based on a cookie-centric model.

“Cookie deprecation will reinforce prDOOH's strong position because it will be a media that is very ready to operate in a cookie-less world”

RICARDO MOLERO, INVESTMENT & BIDDABLE MEDIA LEAD,
PUBLICIS GROUPE

“We have a lot of clients that use first party data with prDOOH. It feels like prDOOH has already adapted to that change [cookie deprecation] ahead of time”

SILKE VOLLMAHN, OOH, RADIO & CINEMA TRADING DIRECTOR,
IPG MAGNA

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

7. 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.

HOW IS PROGRAMMATIC DIGITAL OUT-OF-HOME TYPICALLY BOUGHT IN SPAIN

AND WHERE DOES IT SIT ON A MEDIA PLAN?



According to our survey, OOH teams are marginally more often tasked with buying prDOOH in Spain, compared with 60% who indicated that prDOOH is bought by the programmatic/digital team, significantly higher than the percentage of advertisers in other markets who said the same⁸.

This suggests that programmatic/digital teams in Spain are more familiar with prDOOH and its capabilities, and are therefore better equipped to plan and buy it.

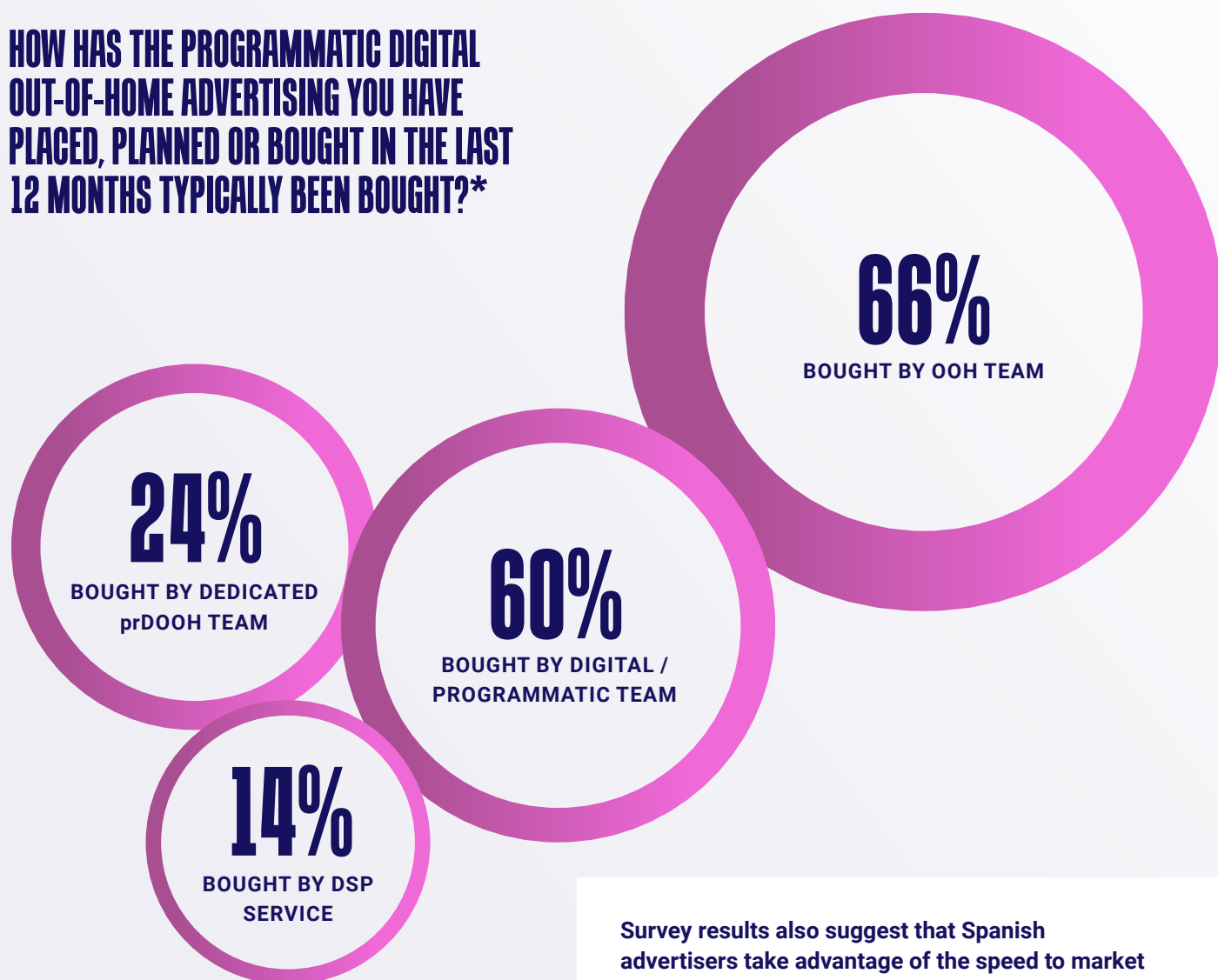
“When we receive a brief, the conventional outdoor teams who are planning outdoor media will talk with the programmatic teams in order to include our solution on the media plan.”

RICARDO MOLERO, INVESTMENT & BIDDABLE MEDIA LEAD, PUBLICIS GROUPE



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

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 ES (178)

In a similar vein, advertisers in Spain are more likely to purchase prDOOH through DSPs (32%) and **in-house teams** (21%)⁹. This is a departure from the norm across other markets, where prDOOH is typically purchased through media agencies or OOH specialist media agencies.

Survey results also suggest that Spanish advertisers take advantage of the speed to market that is afforded through programmatic buying, a key benefit of prDOOH. In Spain, prDOOH is typically added to a media plan during a campaign's strategic planning and budget allocation phase, with 55% of Spanish advertisers surveyed indicating that they include prDOOH on a plan prior to activation. On the other hand, just over a third of Spanish advertisers surveyed (35%) decide to include PrDOOH on a plan when buying the media and activating the campaign¹⁰.

"If the client is a more typical programmatic advertiser, prDOOH would get introduced via the programmatic trading team. The same goes for clients that are big classic OOH spenders, then prDOOH might get handled from the OOH planning & buying team"

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

9. C1: Who has typically been responsible for planning and buying programmatic digital out-of-home in the last 12 months?

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

86% OF SPANISH ADVERTISERS SURVEYED BELIEVE THAT **PROGRAMMATIC DIGITAL OUT-OF-HOME** IS IMPORTANT FOR PERFORMANCE-LED CAMPAIGNS

86%

Spanish advertisers capitalise on the duality of a broadcast medium with programmatic targeting, and utilise prDOOH in both performance and branding contexts. Among all the markets surveyed, and alongside France, Spain exhibited the highest percentage (80%) of advertisers who consider prDOOH important for brand-led campaigns¹¹. Perhaps more interestingly, a larger proportion of Spanish advertisers (86%) emphasise the importance of prDOOH for performance-led campaigns compared to any other channel included in our survey¹².

Spanish advertisers consider social media and display advertising to be a natural fit to complement prDOOH in both brand and performance campaigns. 83% of Spanish advertisers say they would supplement prDOOH with display to achieve both brand and performance objectives. The same number (83%) say they would buy social media alongside prDOOH in a brand-based activation¹³, whilst a marginally lower proportion (82%) say they would use social media as a complement to prDOOH in a performance-based campaign¹⁴.

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



“Right now, I would say around 99% of the campaigns that we run with prDOOH are branding campaigns”

RICARDO MOLERO, INVESTMENT & BIDDABLE MEDIA LEAD,
PUBLICIS GROUPE

“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

- 11. B5: What channels do you see as important for brand-led campaigns?
- 12. B4: What channels do you see as important for performance-led campaigns?
- 13. D2: Thinking about brand-led campaigns, which channels would you consider running programmatic digital out-of-home alongside?
- 14. D1: Thinking about performance-led campaigns, which channels would you consider running programmatic digital out-of-home alongside?

WHAT CHALLENGES DO ADVERTISERS IN SPAIN NEED TO OVERCOME

IN ORDER TO UNLOCK THE FULL POTENTIAL OF PROGRAMMATIC DIGITAL OUT-OF-HOME?



According to our research, the biggest challenge facing Spanish advertisers with prDOOH is proving its value to justify its higher price, and quantifying its value compared to DOOH and traditional OOH. More Spanish advertisers (26%) disagree with the statement that programmatic digital OOH provides excellent value for money than in any other market¹⁵.

“The CPM of programmatic advertising is higher in broad targets, so we really have to make sure that we deliver net value, for example, more narrow target audiences or segmentation”

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

“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

A number of advertisers are also having difficulty determining the value of prDOOH in cross-channel campaigns. In some cases, this is slowing down adoption, as advertisers need to understand the ROI they receive from the channel in order to justify the price premium attached to prDOOH.



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

As a result, Spanish advertisers want to see more concrete data that proves the value of prDOOH (36%)¹⁶ and standardisation in KPIs and measurement techniques (48%)¹⁷. This will help them to determine the channel's true value and gain better visibility of how prDOOH affects other digital channels.

The Spanish market is still in the early stages of understanding the value of prDOOH. Some agency teams are not yet familiar with the medium, and others equate programmatic with low-quality inventory, perhaps based on the early days of programmatic in digital display. As a result, a majority of survey respondents from Spain (64%) say they want to invest in educating their teams about prDOOH and its benefits¹⁸.

16. 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?

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

18. 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?

“Measurement is difficult because it's not at all homogenised. You have different data from different sources from different vendors”

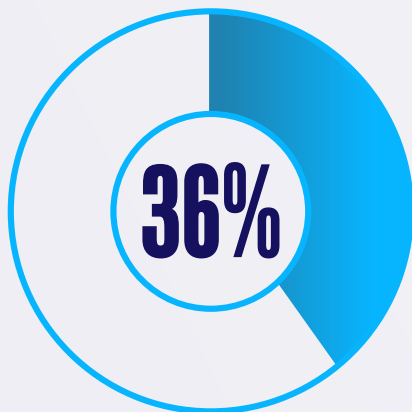
SILKE VOLLMANN, OOH, RADIO & CINEMA TRADING DIRECTOR, IPG MAGNA

“When programmatic buying of OOH was first introduced into the market, some advertisers perceived it to be low quality inventory, a hangover from how some advertisers feel about programmatic more broadly. With prDOOH, it became clear pretty quickly that you get really qualified audiences, and you can make a big impact”

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

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?

MORE TANGIBLE METRICS AROUND THE CHANNEL TO DEMONSTRATE VALUE

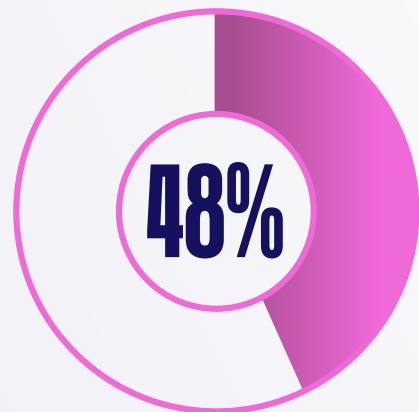


**% WHO AGREE
WITH STATEMENT**

Source: C8/D4 Base size ES (200)

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

STANDARDS FOR PROGRAMMATIC IN DOOH



**% WHO AGREE
WITH STATEMENT**

For more insights and to understand how Spain 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 Spanish participants based on various factors.

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



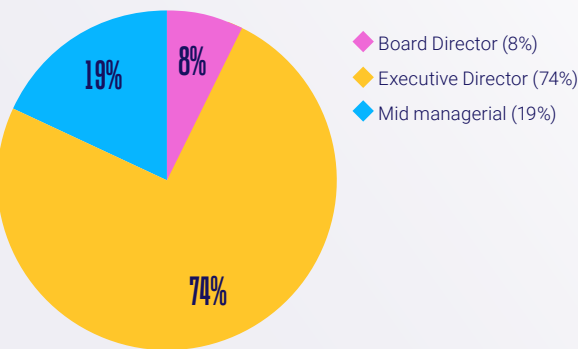
WHAT COUNTRY DO YOU WORK IN?



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

Sector Net	Percentage
Luxury, clothing, FMCG	21%
Food, drink, hospitality	20%
Finance, advertising, consulting	18%
Automotive, transport	13%
Tech, telco	11%
Entertainment, gambling	10%
Academic, gov, non-profit, healthcare	8%
Property, utilities	1%

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



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

