



US market highlights



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EXECUTIVE SUMMARY

- ◆ The US digital out-of-home (DOOH) market is well-established, with strong adoption of programmatic DOOH (prDOOH). In the past 18 months, **29% of US campaigns have incorporated prDOOH, a figure expected to rise to 37% over the next 18 months**
- ◆ **Using Demand-Side Platforms (DSPs) for the buying and activation of prDOOH has seen a marked 16 percentage point increase YoY**, with 34% of US marketers using them for some or all of their campaigns, although this responsibility lags behind both specialist OOH agencies (84%, +31ppt YoY) and general media agencies (60%, -18ppt YoY)
- ◆ **US marketers are increasingly prioritizing tangible results when assessing prDOOH campaign success**, with a strong focus on performance-based metrics. Sales increase (60%) and website traffic impact (49%) emerge as the most valued indicators
- ◆ **Dynamic Creative Optimization (DCO) is gaining significant traction among US marketers**, with 94% either considering or actively incorporating it into their campaigns
- ◆ **The US prDOOH market is poised for substantial growth, with planned investments projected to increase by an average of 29% over the next 18 months.** This surge is driven by a growing demand for programmatic solutions, leading to a shift in budget allocations towards prDOOH

INTRODUCTION

VIOOH partnered with international research and strategy agency, MTM, to survey 1,200 advertisers and agencies across five key global markets – the US, UK, Australia, Germany, France, and an additional guest market, Brazil – to gain insights into the current state of prDOOH advertising.

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

This report focuses on findings specific to the US market.

WHAT IS THE CURRENT STATE OF prDOOH IN THE US?



As highlighted in previous VIOOH State of the Nation reports, the US has a well-established digital out-of-home (DOOH) market and has demonstrated strong adoption of programmatic DOOH (prDOOH). In the past 18 months, prDOOH has been integrated into an average of 29% of US campaigns, placing the US alongside the UK (29%) as a global leader in this trend (27% global average)¹.

This adoption is expected to increase, with projections indicating that the proportion of US campaigns integrating prDOOH will rise from 29% to 37% in the next 18 months, surpassing all other surveyed markets (35% globally)².

US advertisers are increasingly embracing programmatic buying for DOOH, drawn to its flexibility, precise targeting, and efficiency. This shift is evident in the substantial 25 percentage point year-over-year increase in programmatic-only buys, now accounting for 53% of DOOH campaigns purchased in the past 12 months³. However, direct-only buys remain prevalent, representing 59% of campaigns (+17ppt YoY), a trend particularly pronounced in the US and Germany (52%), compared to the global average of 49%.

The rate of programmatic growth has been supercharged, showcasing its increasing importance and impact. The interest from clients and agencies has been fantastic as they call for programmatic [prDOOH] buying in briefing details.

CHLOE ZAHARKO
ASSOCIATE DIRECTOR, GROUPM, US

Additionally, hybrid approaches that combine direct and programmatic buys are gaining popularity. Currently, 41% of marketers are utilizing this method, a 9 percentage point increase from the previous year, indicating a growing appreciation for the strategic advantages of integrating both approaches.

This hybrid model enables marketers to secure premium placements farther in advance through direct buys while leveraging the flexibility and targeted reach of programmatic buys, resulting in increased efficiency and overall campaign effectiveness.

The scope of inventory and publishers available programmatically has changed drastically over the last two years. Teams are much more aware of where their dollars are going and how to be more efficient with programmatic.

JUSTIN SYMONS
HEAD OF INVESTMENT, RAPPORT, US



37%

**OF MEDIA PLANS IN
THE US WILL INCLUDE
prDOOH 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: 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?

Given the enthusiastic adoption of prDOOH by US marketers, it is unsurprising that a significant majority (93%) consider it to offer the most innovative opportunities in advertising. This represents a notable 13 percentage point increase year-over-year⁴, surpassing both social media (91%) and DOOH (82%).

This growing recognition highlights the appeal of prDOOH's dynamic features, such as real-time campaign adjustments, precise audience targeting, and creative optimization, which empower marketers to create more engaging and impactful campaigns.



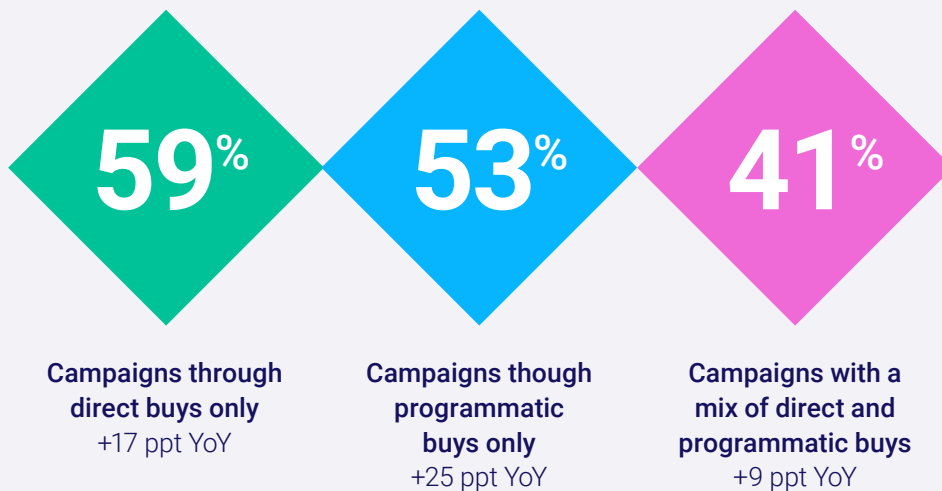
OF SURVEYED MARKETERS
IN THE US BELIEVE

**prDOOH OFFERS THE
MOST INNOVATIVE
ADVERTISING
OPPORTUNITIES
OF ALL MEDIA
CHANNELS**

Efficiency, targeting, and accountability are the main selling points for programmatic - you can target your audience efficiently and effectively which programmatic allows for agile campaign planning.

JUSTIN SYMONS
HEAD OF INVESTMENT, RAPPORT, US

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



Source: B11 Base size: all respondents who buy DOOH or prDOOH US (172). Please note totals do not equal 100% due to buying methods rated separately on a 5-pt scale from 'Never' to 'Always' allowing for overlap of 'Usually/Always' responses.

US marketers recognize distinct advantages of prDOOH, citing three key benefits, one of which aligns with those identified globally⁵:



Establishing trust with target consumers

By delivering relevant, timely messages in contextually appropriate environments, prDOOH can foster trust with consumers, reinforcing the idea that the brand is present when needed. Its non-intrusive presence in public spaces further enhances brand credibility and contributes to a positive perception (64% prDOOH vs. 50% DOOH vs. 47% OOH).



Dynamic creative capabilities

prDOOH enables marketers to craft dynamic content tailored to specific audiences, contexts, and real-time conditions. This level of customization allows brands to create impactful narratives that resonate with their target demographics, increasing engagement and driving conversions (62% prDOOH vs. 55% DOOH vs. 43% OOH).



Triggering a positive emotional response

By blending the high-impact format of DOOH with engaging, contextually relevant creative, prDOOH can effectively capture audience attention, evoke emotional responses, and leave a lasting impression (61% prDOOH vs. 52% DOOH vs. 50% OOH).

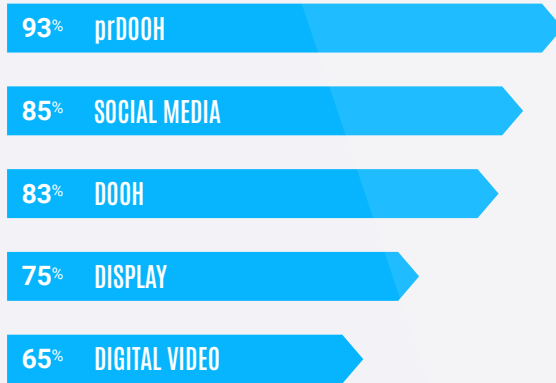
Agencies are increasingly advocating for prDOOH due to its efficiency, scalability, and data-driven approach. Agencies also recognize the potential for enhanced audience targeting and real-time campaign optimization, together with what is seen across other programmatic channels.

CHLOE ZAHARKO
ASSOCIATE DIRECTOR, GROUPM, US

WHICH CHANNELS DO YOU SEE AS IMPORTANT FOR PERFORMANCE-LED CAMPAIGNS?

TOP 5 CHANNELS

Performance-led



Source: B4/B5 Base size: US (200)

The numerous benefits of prDOOH are prompting US marketers to utilize the channel for a range of campaign objectives.

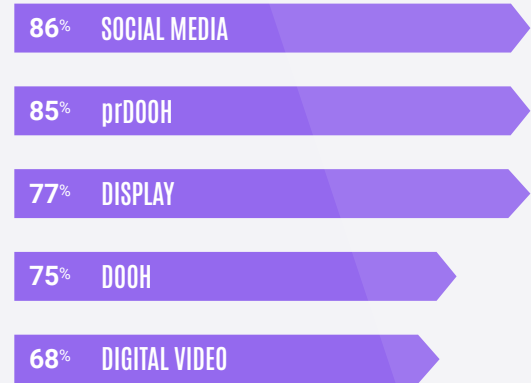
For performance campaigns, prDOOH has emerged as the top choice (93%), surpassing even social media (85%), with an impressive 17 percentage points year-over-year increase⁶.

While social media (86%) narrowly edges out prDOOH (85%) as the top choice for brand-related campaigns, prDOOH follows closely behind, demonstrating a notable 8 percentage point increase from 2023⁷. To further enhance these brand-led campaigns, marketers frequently integrate prDOOH with other channels, primarily display (84%) and social media (84%)⁸.

WHICH CHANNELS DO YOU SEE AS IMPORTANT FOR BRAND-LED CAMPAIGNS?

TOP 5 CHANNELS

Brand-led



We use programmatic to strategically position OOH alongside other high usage media such as digital display and video... This enables OOH to be featured on plans as a valuable performance driving channel for our clients.

CHLOE ZAHARKO
ASSOCIATE DIRECTOR, GROUPM, US

⁶ B4: What channels do you see as important for performance-led campaigns?

⁷ B5: What channels do you see as important for brand-led campaigns?

⁸ D2: Thinking about brand-led campaigns, which channels would you consider running programmatic digital out-of-home alongside?

WHAT ARE THE KEY prDOOH TRENDS IN THE US?



1 THE US IS SEEING A SHIFT IN WHO'S PLANNING prDOOH CAMPAIGNS

US advertisers increasingly rely on a mix of providers for planning and buying prDOOH.

Notably, 84% of US advertisers utilize OOH specialist media agencies for prDOOH planning and buying, noticeably higher than the global average of 76%. This represents a remarkable 31 percentage point year-over-year increase, emphasizing the value placed on the expertise of these agencies in navigating the nuances of OOH media and understanding outdoor audience behaviors spread across the US⁹.

We are predominantly executing our prDOOH self-service through a DSP. We pride ourselves as an agency on being forward-thinkers and forward-adopters of programmatic out-of-home, and so we've gotten to the point where we're planning our own campaigns in a DSP and activating those campaigns ourselves vs. having a programmatic partner plan our campaigns and activate them through a managed service approach. We have more control over guiding the strategy, the environments, the publishers, the formats, and the audiences.

JUSTIN SYMONS
HEAD OF INVESTMENT, RAPPORT, US

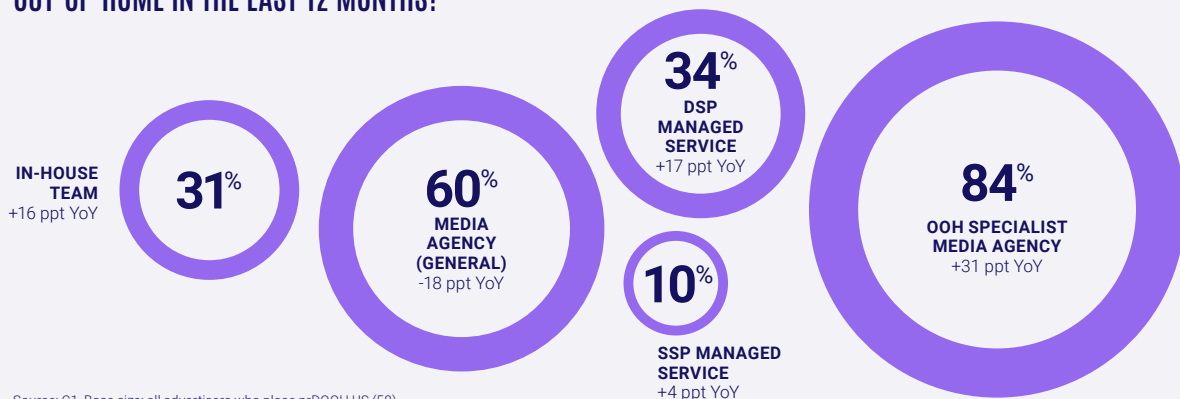
An audience-centric approach to prDOOH planning powered by AI allows us to fine-tune media strategies across multiple essential elements such as environment, moment, location and partners. This approach applied to OOH would ensure our campaigns are more targeted, relevant, efficient, and deliver optimized performance, ultimately leading to a better ROI for our clients.

CHLOE ZAHARKO
ASSOCIATE DIRECTOR, GROUPM, US

In addition, Demand-Side Platforms (DSPs) have seen a substantial surge in adoption, with a 34% utilization rate and a 17 percentage point year-over-year increase. This aligns with the global trend of growing DSP adoption in the prDOOH space, and reflects a shift towards audience-centric purchasing strategies.

Furthermore, the ability of DSPs to streamline buying across various channels (display, social, DOOH, etc.) suggests that US marketers are increasingly incorporating DOOH into their broader multi-channel strategies, leveraging its unique strengths to complement and enhance other digital campaigns.

WHO HAS TYPICALLY BEEN RESPONSIBLE FOR PLANNING AND BUYING PROGRAMMATIC DIGITAL OUT-OF-HOME IN THE LAST 12 MONTHS?



Source: C1. Base size: all advertisers who place prDOOH US (58)

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

2 THE US IS LEADING THE WAY IN ADOPTION OF DYNAMIC CREATIVE OPTIMIZATION (DCO)

US marketers are increasingly embracing the creative potential of DCO for prDOOH campaigns. An impressive 94% of US marketers are considering, piloting, or actively integrating DCO into their campaigns¹⁰.

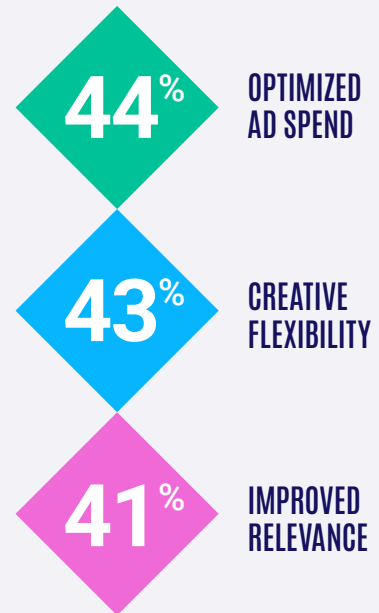
This strong interest aligns with marketers' recognition of dynamic creative capabilities as a key benefit of programmatic buying for DOOH.

While the adoption of DCO among US marketers currently stands at a modest 16%, this figure is notably higher than the global average of 9%, indicating significant potential for further growth in the US market.

US marketers clearly recognize the benefits of DCO, citing three key advantages: optimized ad spend (44%), creative flexibility (43%), and improved relevance (41%)¹¹.

Additionally, the real-time adaptability of DCO, particularly valued in the US (36%), allows marketers to respond quickly to trends or events, further enhancing the effectiveness of prDOOH campaigns.

KEY ADVANTAGES OF DCO



Source: D9 Base size US (101)

The ability to deliver creative in an adaptive, contextually relevant, and automated way using data signals (including time of day, weather, audience, and location) enhances the user experience and improves overall campaign performance by making our ads more relevant and engaging to the target audience.

CHLOE ZAHARKO
ASSOCIATE DIRECTOR, GROUPM, US

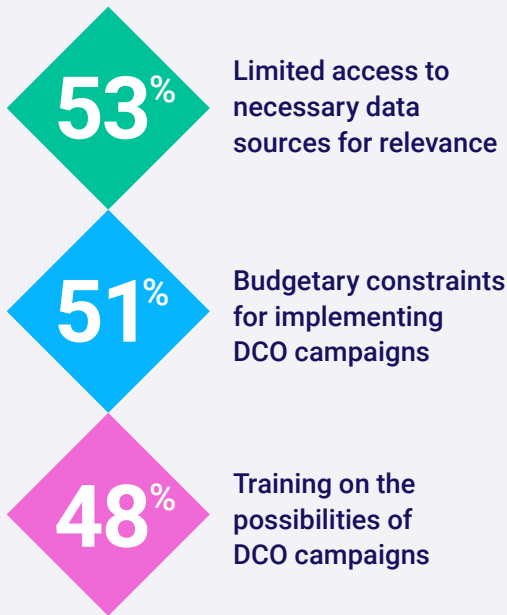
¹⁰ D7: Do you currently integrate Dynamic Creative Optimisation (DCO) into your programmatic digital out-of-home advertising?

¹¹ D9: Which, if any, of the following potential benefits can Dynamic Creative Optimisation (DCO) offer for programmatic digital out-of-home advertising?

[DCO] provides more flexibility. We want to make sure we're delivering the right message at the right time, to the right person in the right environment, and being able to do that in a creative way, enhances our clients' overall campaign.

JUSTIN SYMONS
HEAD OF INVESTMENT, RAPPORT, US

TOP THREE BARRIERS OF DCO ADOPTION IN prDOOH



Source: D8 Base size: all respondents who do not use DCO or consider using it in the future US (101)

Despite the growing enthusiasm for DCO in the US, some challenges remain.

The primary barriers to DCO adoption cited by US marketers include limited access to relevant data sources (53%), budget constraints (51%), and insufficient training on DCO capabilities (48%)¹². Addressing these challenges will be crucial in unlocking DCO's full potential for US marketers.

Despite these hurdles, the role of DCO is rapidly expanding, as evidenced by a 4 percentage point year-over-year increase (reaching 62%) in marketers planning to incorporate dynamic creative into their prDOOH campaigns¹³.

This growing demand underscores the importance of DCO in driving future prDOOH investments, with over half of US marketers (56%) prioritizing the ability to utilize dynamic creative, and a similar proportion (57%) emphasizing the importance of leveraging first or third-party data in their decision-making processes¹⁴.

¹² D8: Which of the following, if any, are preventing you from adopting Dynamic Creative Optimisation (DCO) for programmatic digital out-of-home advertising?

¹³ 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?

¹⁴ C13: How important are the following in determining your investment in programmatic digital out-of-home?

3 US MARKETERS RELY ON PERFORMANCE-BASED METRICS FOR MEASURING prDOOH

Our survey reveals that US marketers prioritize performance-based metrics when evaluating prDOOH campaigns, particularly sales uplift (60%) and website traffic impact (49%)¹⁵. This emphasis on tangible results is notably pronounced in the US, UK, and Australia, underscoring prDOOH's effectiveness in driving measurable consumer action.

In fact, performance metrics are pivotal for US marketers not only in assessing campaign success but also in shaping future prDOOH strategies. Value for money (73%), brand effectiveness (71%), and return on investment (ROI) (68%)¹⁶ are key drivers in investment decisions, further emphasizing the need for prDOOH campaigns to deliver tangible results and cost-effectiveness in the US market.

We're looking at target impressions, play reports and reach frequency. We always utilize as many standardized metrics as possible so that we're measuring every network and publisher equally.

JUSTIN SYMONS
HEAD OF INVESTMENT, RAPPORT, US

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

QUITE / VERY IMPORTANT



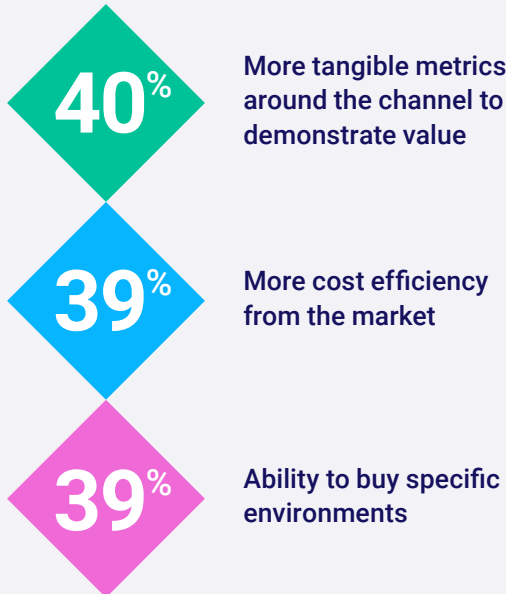
Source: C13 Base size: US (200)

¹⁵ D5: How do you see measurement/attribution in programmatic digital out-of-home being measured?
¹⁶ C13: How important are the following in determining your investment in programmatic digital out-of-home?

WHAT IS THE FUTURE OUTLOOK FOR prDOOH IN THE US?

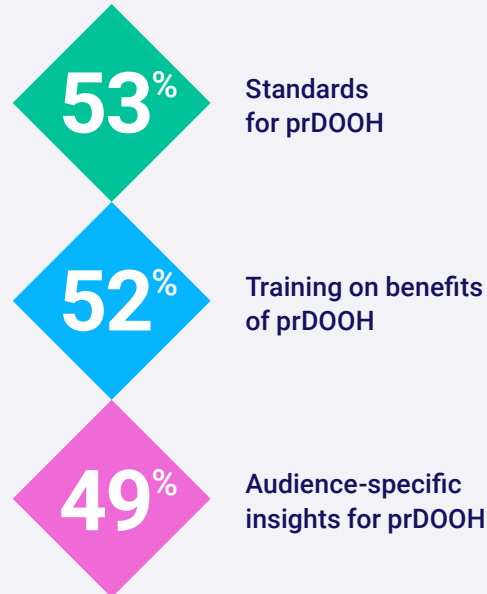


WHICH OF THE FOLLOWING WOULD YOU LIKE TO SEE IN ORDER TO GIVE PROGRAMMATIC DIGITAL OUT-OF-HOME CAMPAIGNS MORE VALUE AND MAKE YOU INVEST MORE?



Source: C8. D4. Base size: US (200)

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



The US prDOOH market is poised for continued growth, with marketers demonstrating a strong commitment to programmatic investment. Survey respondents plan to increase their prDOOH budgets by an average of 29% over the next 18 months, surpassing the global average of 28% and aligning with the significant growth projections in the UK (29%) and France (29%)¹⁷.

The growing demand for programmatic advertising is reshaping budget allocations in the US, with prDOOH capturing a larger share of new advertising investments. The US and Australia are leading this trend, with 28% of US marketers (and 27% of Australian marketers) allocating net new budgets to prDOOH, a 13 percentage point increase from 2023¹⁸.

Furthermore, a notable 37% of US marketers are reallocating budgets from other digital channels to prDOOH, a trend that has grown by 3 percentage points since 2023. This shift further highlights the increasing attractiveness and perceived value of prDOOH in the digital advertising landscape.

To further demonstrate prDOOH's value and justify increased investment, US marketers seek more tangible metrics (40% +12ppt YoY), increased cost efficiency (39%, +5ppt YoY), and the ability to buy specific environments (39%, +6ppt YoY)¹⁹. These demands reflect a growing emphasis on measurable results, optimized spending, and targeted placement in the prDOOH space.

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

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

19 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?

To enhance their understanding and mastery of prDOOH, US marketers have identified three key areas for improvement:²⁰



Establishing standards for prDOOH
(53%, +8ppt YoY)

This demand highlights the needs for consistent guidelines and best practices to ensure reliability, transparency, and effectiveness in programmatic DOOH advertising.



Widespread education on the benefits of prDOOH
(52%, +13ppt YoY)

This encompasses comprehensive training on programmatic buying, campaign optimization, and measurement strategies, equipping both new and experienced marketers with the knowledge and tools needed to fully harness the power of prDOOH.



Deeper audience-specific insights
(49%, +7ppt YoY)

Marketers are seeking more detailed audience data, including demographic, interest-based, and behavioral data, to enhance targeting strategies and deliver more personalized and relevant advertising.

While these remain key areas of focus, the US market has made notable progress since 2023 in addressing some concerns. Notably, the demand for data to drive direct response campaigns (-12ppt YoY), always-on deals (-10ppt YoY), and greater precision / targeting options (-3ppt YoY) has decreased, indicating positive advancements in these areas.

We need to get to a better point [where we have] standardized, elevated measurement in programmatic out-of-home.

JUSTIN SYMONS
HEAD OF INVESTMENT, RAPPORT, US



US MARKETERS PLAN TO
**INCREASE SPEND IN
PROGRAMMATIC DIGITAL
OUT-OF-HOME BY AN
AVERAGE OF 29%**
OVER THE NEXT 18 MONTHS

Developing more robust and standardized metrics to measure the effectiveness and ROI of prDOOH campaigns will help build confidence and drive investment.

CHLOE ZAHARKO
ASSOCIATE DIRECTOR, GROUPM, US

CONCLUSION

The US remains one of the leading markets for prDOOH, boasting impressive adoption rates and rising budgets. This surge reflects marketer confidence in prDOOH's flexibility, performance-driven results, and ability to build brand trust. DCO adds another layer of appeal, with US marketers leading the charge in adoption.

To fully unlock prDOOH's potential, however, standardized metrics, industry education, and deeper audience insights remain key priorities. Nevertheless, the focus on measurable results and innovative ad formats positions the US prDOOH market for continued growth and success.

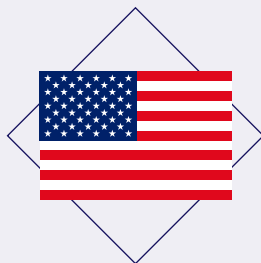
For more insights and to explore how the US compares within the global prDOOH landscape, access the VIOOH State of the Nation 2024 Global White paper [HERE](#).

US SAMPLE PROFILE

SIZE OF ADVERTISING BUDGET



COUNTRY

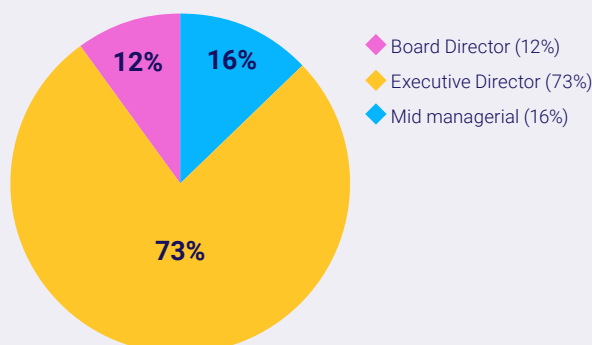


N=200

SECTOR

Sector Net	Percentage
Retail, luxury, clothing, FMCG/CPG	35%
Food, Drink, Hospitality	20%
Entertainment, gambling	11%
Tech, telco	10%
Automotive, transport	10%
Finance, advertising, consulting	7%
Academic, gov, non-profit, healthcare	5%
Property, utilities	4%

MANAGERIAL RESPONSIBILITY



ORGANIZATION TYPE

