

**STATE OF THE
NATION**
Programmatic DOOH 2024

VIOOH

| Global report



In partnership with

mtm

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Executive summary

- ◆ Programmatic DOOH (prDOOH) continues to experience high demand, with projected inclusion in media plans set to rise from 27% to 35% over the next 18 months, driven by economic recovery and growing advertiser interest. **Media professionals anticipate a 28% average increase in prDOOH investment within the same timeframe**
- ◆ Marketers are increasingly embracing the advantages of programmatic buying in DOOH. For the first time in State of the Nation history, **half of all DOOH campaigns run in the year-to-date were purchased partly or fully programmatically**, mostly overseen by digital and programmatic teams. This indicates a growing integration of prDOOH into broader digital marketing strategies
- ◆ PrDOOH's recent growth is primarily fuelled by an increasing demand. **When prDOOH is bought by digital/programmatic teams, the budget predominantly originates from other digital (81%) and traditional channels (79%)**
- ◆ **prDOOH's growth is also driven by the innovative opportunities it offers.** While Dynamic Creative Optimisation (DCO) is still in the early stages of adoption, its value in enhancing campaign effectiveness is widely recognised, and we anticipate an uptick in its utilisation in the coming year
- ◆ **A lack of standardised KPIs and measurement methodologies remains a key challenge for prDOOH adoption.** Marketers seek in-depth training and access to granular audience data to effectively measure ROI and demonstrate the value of prDOOH campaigns

INTRODUCTION

Programmatic digital out-of-home (prDOOH) is rapidly transforming the way advertisers reach audiences on the go. Building on digital out-of-home (DOOH) advertising, prDOOH utilises programmatic buying to automate inventory purchases, providing advertisers with enhanced control, flexibility, and data-driven targeting capabilities.

As a result, prDOOH adoption has accelerated among advertisers in recent years, a trend expected to increase as the technology matures and as the amount of programmatic inventory available expands.

Drawing on a comprehensive survey of media professionals across six global markets, this white paper explores the current landscape and future trajectory of prDOOH advertising. It examines the factors driving its growth, its advantages over traditional OOH, and its versatile applications across campaigns.

Additionally, the paper addresses knowledge gaps and barriers to wider adoption, proposing strategies to help the industry unlock prDOOH's full potential.

VIOOH partnered with the international research and strategy agency, MTM, to survey 1,200 advertisers and agencies across five core global markets — the US, UK, Australia, Germany, France, and an additional guest market, the fast growing 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 for all six markets. Year-over-year (YoY) comparisons between 2024 and 2023 data are shown only across core markets (US, UK, AU, DE, FR). **Individual market highlights can be found [here](#).**

prDOOH TEMPERATURE CHECK: YOY PERFORMANCE AND 2024 FORECAST



Programmatic DOOH remains in high demand amongst media executives globally.

Survey results indicate that nearly one in three campaigns from the past 18 months have included prDOOH (27%)¹, and this figure is projected to rise to an average of 35% over the next 18 months.

Mirroring trends identified in last year's State of the Nation (SOTN) report, France, Australia, Germany and the US are projected to spearhead this growth, with the proportion of campaigns utilising prDOOH in these markets expected to increase the most.

Despite a slight downward revision in the 2023 global ad spend forecast due to economic challenges in 2022², marketers are demonstrating renewed optimism for the current year. Nielsen's annual marketing report reveals that 72% anticipate increased ad spending this year, compared to 64% in the previous year³.

This optimism is reflected in the projected surge in prDOOH investment, with survey respondents anticipating an average increase of 28% over the next 18 months⁴, led by US, UK and French marketers, all projecting a 29% growth in investment.

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 buying in briefing details.

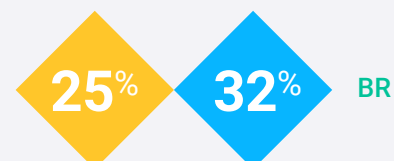
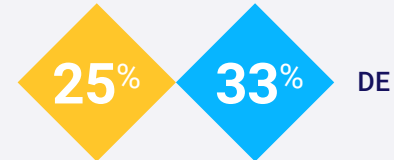
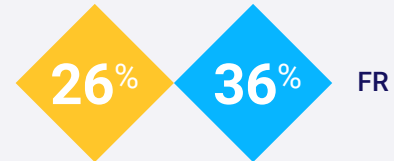
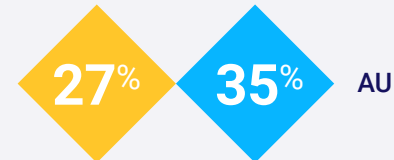
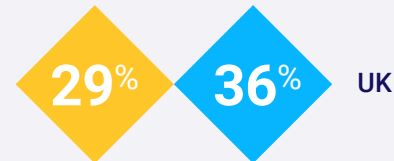
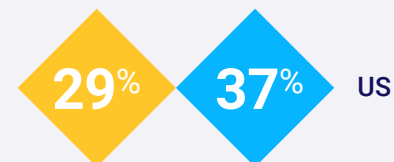
CHLOE ZAHARKO,
ASSOCIATE DIRECTOR, GROUPM, US

THINK OF THE CAMPAIGNS YOU HAVE WORKED ON IN THE PAST 18 MONTHS, FOR WHAT PROPORTION HAVE YOU PLACED, PLANNED OR BOUGHT prDOOH ADVERTISING?

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 prDOOH ADVERTISING?

CAMPAIGNS INCLUDING prDOOH IN...

◆ PAST 18 MONTHS ◆ NEXT 18 MONTHS



CORE MARKETS

GUEST MARKET

Source C10/C11 Base size, Total (1200).
US (200), UK (200), AU (200), FR (201), DE (200), BR (199).
Note: Core markets include US, UK, AU, FR, DE. BR is a guest market

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 <https://www.dentsu.com/news-releases/latest-2023-dentsu-ad-spend-re-forecast>
3 2024 Annual Marketing Report: Maximizing ROI in a fragmented media world by Nielsen
4 B7: How do you think your advertising investment in the following media will change in the next 18 months?

Interestingly, the growth in prDOOH investment is being driven primarily by existing adopters, who are more likely to include prDOOH in their media plans in future (36%) compared to those who are investing in prDOOH for the first time (32%)⁵. This suggests that familiarity with the format and its benefits is a key factor in continued investment.

In fact, existing adopters plan to boost their prDOOH spending by an average of 30% over the next 18 months, outpacing the 23% increase planned by new adopters⁶. This highlights the importance of education and outreach to encourage broader adoption and continued investment in prDOOH across the industry.



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

prDOOH was trialled tactically to begin with, mostly due to its flexibility throughout Covid lockdowns... Whilst that speed to market and in-flight agility are still very beneficial, that tactical application has evolved into more always-on strategic use cases.

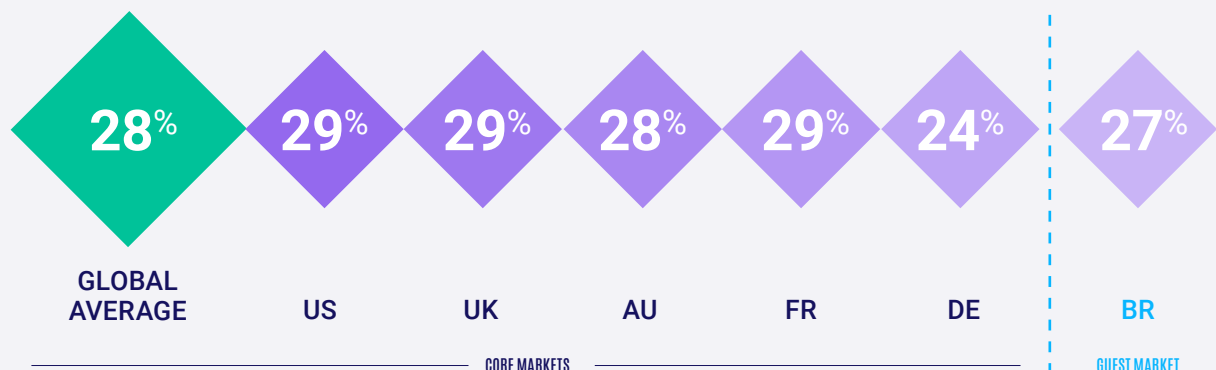
MICHAEL WHITESIDE,
CHIEF MEDIA ACTIVATIONS OFFICER,
KINESO, AUSTRALIA

Most of the [drive for adoption] comes from us, from the agencies because we have all the details about the data, technology, and the opportunities to buy media with more efficiency.

ISABELLA RODRIGUES,
EXECUTIVE DIRECTOR, CLIENT SOLUTIONS,
ESSENCEMEDIACOM, GROUPM, BRAZIL

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

AVERAGE % INCREASE IN INVESTMENT IN prDOOH IN NEXT 18 MONTHS




Source B7 Base size, Total (1200), US (200), UK (200), AU (200), FR (201), DE (200), BR (199).

⁵ 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?
⁶ B7: How do you think your advertising investment in the following media will change in the next 18 months?


Furthermore, our survey reveals a shift within the out-of-home advertising landscape, with digital formats leading the charge. Marketers globally are projected to increase their investment in digital out-of-home by an impressive 32%, followed closely by prDOOH at 28%. While investment in traditional OOH is also expected to grow (16%), the surge in digital investment signifies a broader embrace of technology-driven solutions in outdoor advertising.

This growing preference for digital formats creates a fertile ground for prDOOH to flourish. By leveraging DOOH's digital capabilities and integrating seamlessly with other digital channels through programmatic buying, prDOOH is poised to become a driving force in the future of OOH advertising.




The two biggest things are the scope of inventory and publishers available programmatically, and the expertise of out-of-home specialists in the programmatic space where teams are much more aware of where their dollars are going and how to be more efficient with their investment.

JUSTIN SYMONS, HEAD OF INVESTMENT, RAPPORT, US



Before 2019 prDOOH was really small. It has increased a lot in recent years, following a widespread digital reform of advertising in general and programmatic buying, and that's extended to out-of-home.

ANA RAQUEL HERNANDES, HEAD OF FLUID, INITIATIVE, BRAZIL



prDOOH is growing very fast. Our clients are more confident in activating prDOOH. They understand the pros and the cons of it and I think [prDOOH] will grow a lot more in the next 5-10 years.

CHLOÉ RAUCH, SENIOR DISPLAY & PROGRAMMATIC CONSULTANT, ARTEFACT, FRANCE

UNSTOPPABLE GROWTH: WHAT IS FUELLING THE CONTINUED GROWTH OF prDOOH?



What are the forces shaping the upward trajectory of prDOOH?



Increased demand for programmatic buying: A major factor driving prDOOH's sustained success is a growing demand for the flexibility, agility and scalability benefits that programmatic buying offers. Our survey reveals a tipping point - for the first time in our SOTN reporting history, respondents stated that, irrespective of spend amount, **half of all DOOH campaigns run in the year-to-date across both core and guest markets were purchased programmatically (50%)⁷.**

In the core markets, demand for pure programmatic buying has experienced the most rapid growth (+19ppt YoY), outpacing both mixed programmatic and direct buys (+7ppt YoY), and direct buys alone (+6ppt YoY).

It's worth noting, however, that direct-only buys remain a significant portion of DOOH campaigns, with nearly half (49%) still purchased this way.

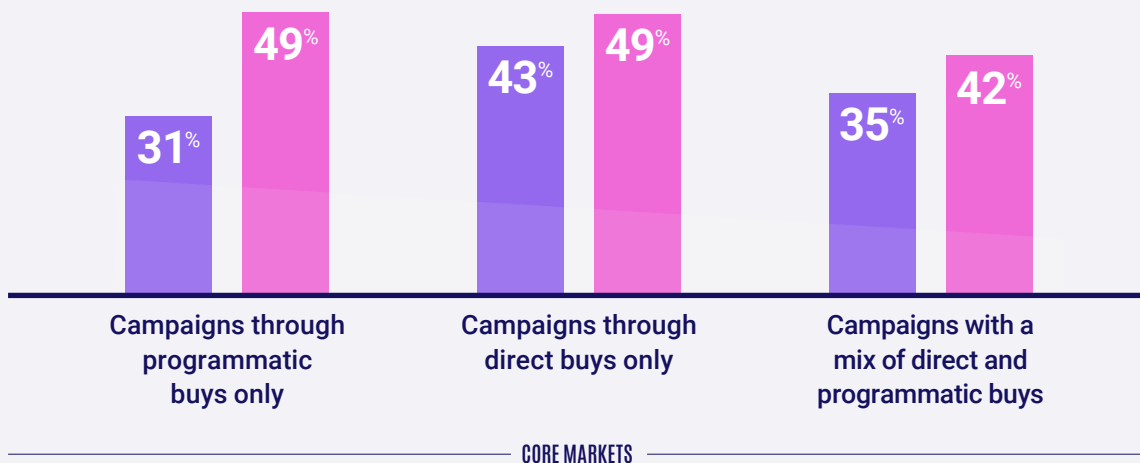
prDOOH makes the buying of out-of-home media easier... because I have more opportunities to buy from more vendors, and I have access to different metrics.

ANA RAQUEL HERNANDES,
HEAD OF FLUID, INITIATIVE, BRAZIL

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

USUALLY / ALWAYS

◆ 2023 ◆ 2024



Source B11 Base size, all respondents who buy DOOH or prDOOH 2024 Core markets (967). 2023 core markets (1095). Please note bars 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.

⁷ B11: In the past 12 months, how have your digital out-of-home campaigns typically been bought?

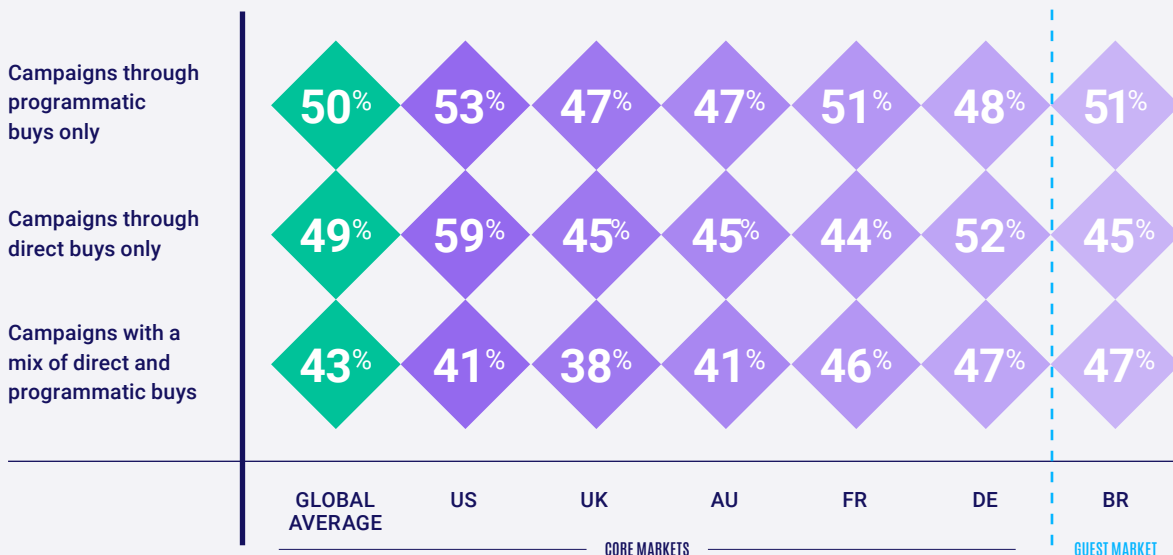
This trend is particularly prominent in the US and Germany, where over half of DOOH campaigns are usually or always purchased directly (59% and 52% respectively).

To effectively reach target audiences in the US, marketers often prioritise media owners with strong regional presence or opt for targeted ad placements in specific locations. This strategy aligns with the localised nature of consumer preferences and media consumption habits across different US states.

In Germany, stringent data privacy regulations (GDPR), a cultural preference for control, and well-established relationships between brands and media owners make direct DOOH buys appealing. While programmatic DOOH is growing, these factors contribute to the continued popularity of direct buys amongst German marketers.

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

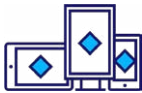
USUALLY / ALWAYS



Source B11 Base size, all respondents who buy DOOH or prDOOH Total (967) US (172), UK (174), AU (148), FR (154), DE (160), BR (159).
Please note verticals 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.

To add to that layer of flexibility, we're incorporating a lot more programmatic into [what] otherwise would have been 100% traditional buys, because brands are getting more comfortable with venues, formats and environments that can be bought programmatically.

JUSTIN SYMONS,
HEAD OF INVESTMENT, RAPPORT, US



Budget shifts from other digital channels

Brands are increasingly leveraging the broadcast reach, brand-safe environment, and high-impact nature of DOOH, combined with programmatic's flexibility, reduced lead times, and seamless integration with other digital channels. In core markets, over a third (37%) of marketers are reallocating budgets from other digital channels to prDOOH. This trend has grown by 4 percentage points year-over-year, indicating that prDOOH is becoming a more attractive option on a multi-channel media plan.



New budgets for prDOOH

Additionally, an increasing number of marketers are allocating entirely new budgets to prDOOH (22%). This shift demonstrates the growing awareness of prDOOH's value and its potential to deliver a significant return on investment. The US and Australia lead this trend, with nearly a third of marketers in each country (28% and 27% respectively) adding new budgets to the channel. This year's SOTN report also highlights a significant milestone: prDOOH is now capturing a larger share of new advertising budgets in core markets (24%), a 10 percentage point increase YoY.

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

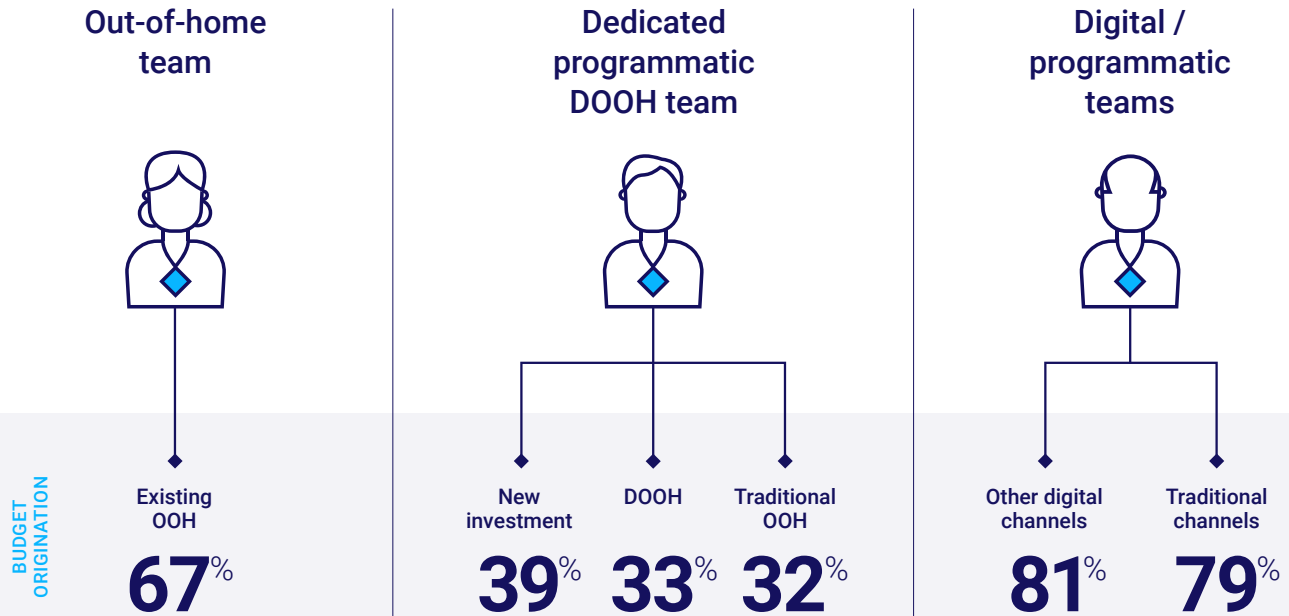
		CORE MARKETS					GUEST MARKET
	Global Average	US	UK	AU	FR	DE	BR
Digital channels (including DOOH)	83%	85%	82%	74%	88%	83%	87%
Traditional channels (including traditional OOH)	59%	51%	54%	55%	64%	67%	65%
New budget is being added for prDOOH	22%	28%	24%	27%	18%	21%	17%

Source C5 all respondents increasing prDOOH. Total (1199), US (200), UK (199), AU (200), FR (201), DE (200), BR (199).
Please note verticals do not equal 100% due to responses to question being multi select as budgets for prDOOH may come from multiple sources.

**Channels such as (performance)
display will likely experience decline
in investment unless measurement
can keep up. OOH will be one of the
beneficiaries of that investment
divesting from elsewhere.**

MICHAEL WHITESIDE,
CHIEF MEDIA ACTIVATIONS OFFICER, KINESSO, AUSTRALIA

Budget for prDOOH is heavily influenced by planning and buying responsibility:



Budget shifts often depend on the campaign purchasing method, team responsibility, and timing of the decision to include prDOOH in the media planning process^{9 10 11 12}.

Respondents utilising a hybrid prDOOH and direct approach (59%) or direct-only buys (48%) for campaign bookings are more inclined to allocate a new budget for prDOOH. In contrast, those using programmatic-only buys tend to reallocate budgets from existing DOOH (52%), with a significant portion also adding budgets (50%), increasing overall prDOOH spend.

When prDOOH is bought by digital / programmatic teams the budget predominantly originates from other digital (81%) and traditional channels (79%).

In cases where a dedicated programmatic DOOH team is responsible for planning and buying, budgets are coming primarily from new investment (39%), DOOH (33%) or traditional OOH (32%). When prDOOH is bought by an out-of-home team, the budget is most likely to come from existing OOH (67%).

Marketers who incorporate prDOOH while planning the media and allocating the budget are also more likely to introduce new budgets (45%). Conversely, those deciding to include prDOOH when buying the media and activating the campaign are more prone to divert budgets from other digital (47%) and traditional channels (50%).

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

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

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

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

UNLOCKING EFFICIENCY: THE ADVANTAGES OF prDOOH

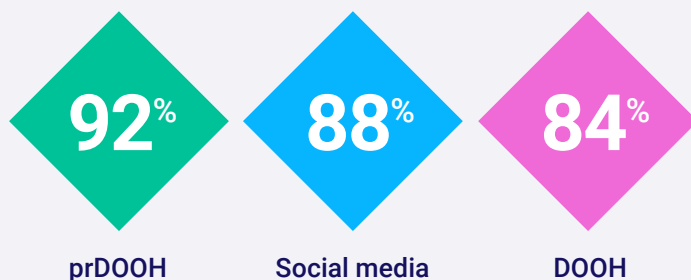


PrDOOH offers a range of innovative features, including dynamic creative optimisation (DCO), real-time campaign adjustments, and cross-channel retargeting. In fact, a huge 92% of respondents consider prDOOH the most innovative advertising channel, a significant 9 percentage point increase from 2023 in core markets¹³.



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

**WHICH OF THESE MEDIA ARE DEVELOPING THE MOST
INNOVATIVE OPPORTUNITIES FOR ADVERTISERS?**



Source: B6 Base size: Total (1200)

Given its innovative capabilities, it's no surprise marketers continue to recognise prDOOH's advantages, citing three key benefits¹⁴:



Dynamic creative capabilities

PrDOOH enables marketers to craft dynamic content tailored to specific audiences, contexts, and real-time conditions. This level of customisation allows brands to create impactful narratives that resonate with their target demographics, increasing engagement and driving conversions (63% prDOOH vs. 55% DOOH vs. 49% OOH).



Sustainable and eco-efficient reach

PrDOOH is only activated when a relevant audience is present or predefined trigger criteria are met, maximising budget and campaign efficiency (62% prDOOH vs. 58% DOOH vs. 52% OOH).



Strong flexibility

PrDOOH offers significant flexibility, with minimal lead times. Advertisers can launch campaigns at short notice, adjusting or pausing them at any time. They can also dynamically optimise placements based on real-time campaign performance (61% prDOOH vs. 58% DOOH vs. 52% OOH).

¹³ B6: Which of these media are developing the most innovative opportunities for advertisers?

¹⁴ 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.

These benefits are followed by establishing trust / credibility with the target audience (60%) and delivering accurate location targeting (60%).

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

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

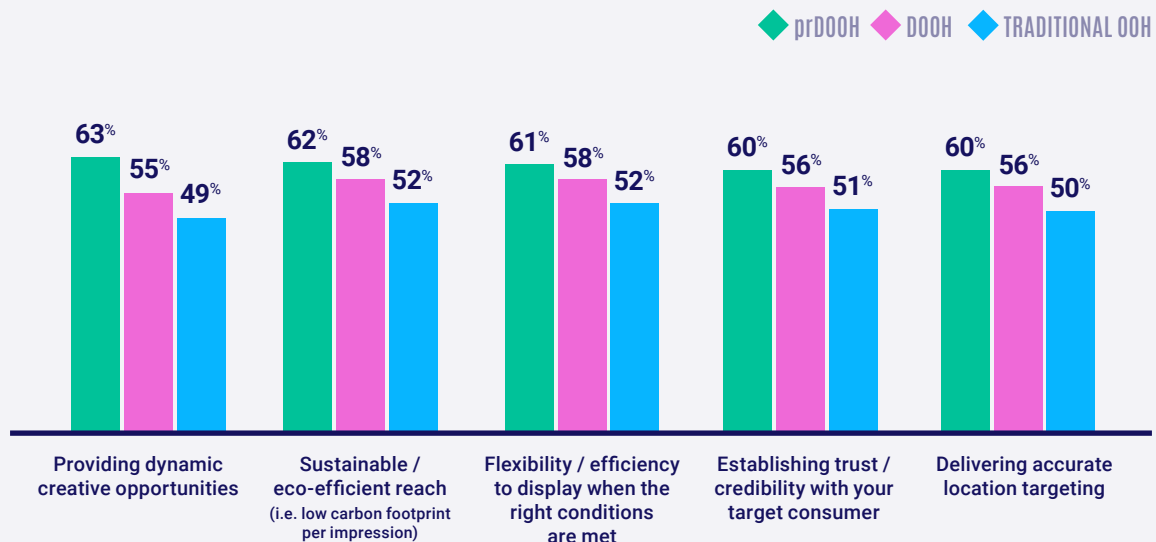
JUSTIN SYMONS,
HEAD OF INVESTMENT, RAPPORT, US

The benefit is to focus the media budget on contacts that matter to you. And when you buy these contacts, you can customize any message in a way that the relevant audience is activated further down in the sales funnel.

BRITTA CIFTCIOGLU,
DIRECTOR PLANNING & DEVELOPMENT OOH,
GROUPM, GERMANY

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

% WHO AGREE



Source B1 Base size: Total (1200)

While these core benefits resonate globally, certain markets prioritise other specific advantages:



Emotional impact

prDOOH packs a punch, combining the large-screen, high impact format of DOOH with the ability to activate engaging creative at contextually relevant moments. **US marketers particularly value prDOOH's ability to evoke positive emotional responses (61% compared to 58% globally).**



High-quality viewability

UK marketers appreciate prDOOH's assurance of high-quality viewability (61% vs. 58% globally), likely due to the premium placement of digital screens in high-traffic locations, and the clarity of digital displays.

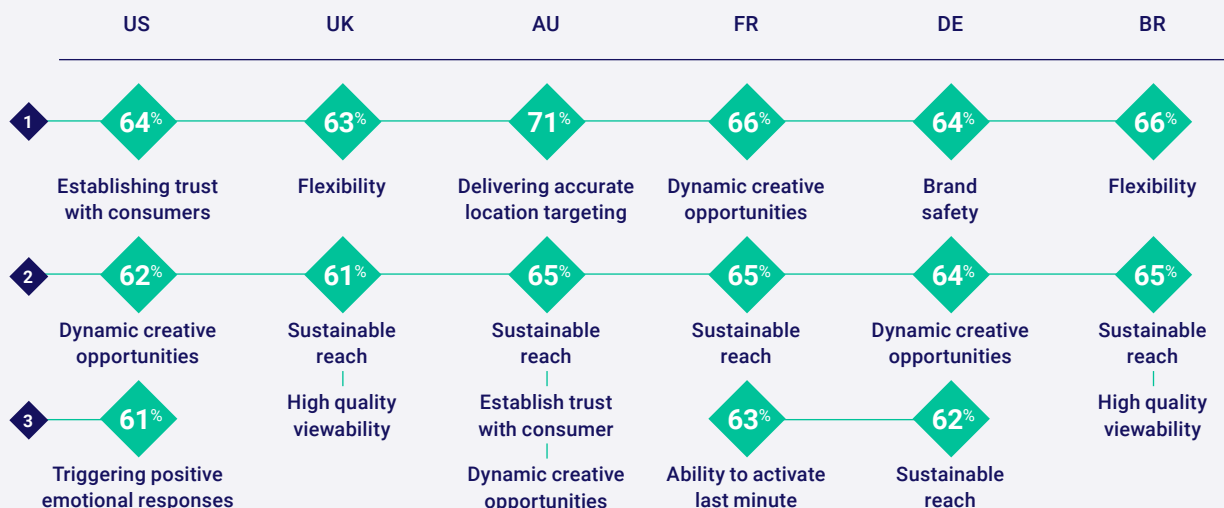


Sustainability

Marketers in the UK (61%), Australia (65%), France (65%), and Brazil (65%) particularly favour prDOOH for its efficiency and sustainability credentials. PrDOOH's ability to minimise wasteful impressions by activating only when targeted audiences are present or specific conditions are met, combined with its one-to-many broadcast nature, makes it a more eco-conscious choice compared to other digital advertising formats.


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

% WHO AGREE WITH STATEMENT ABOUT prDOOH




Source B1 Base size: Total (1200) US (200), UK (200), AU (200), FR (201), DE (200), BR (199).

In fact, advertisers and agencies are increasingly prioritising sustainability in their advertising campaigns. Our survey results reveal that 60% of marketers consider sustainability an important driving factor when investing in prDOOH¹⁵.




Compared to other channels, prDOOH stands out as a leader in sustainability. Thanks to granular targeting parameters, and the reduction in wasted targeting as a result, prDOOH campaigns can be implemented with optimal economic and environmental efficiency.

LAURA HENTSCHEL,
HEAD OF PROGRAMMATIC & DIGITAL MEDIA, IT WORKS, GERMANY



By its very nature, prDOOH is sustainable. Instead of having an ad up for 24 hours, we're only buying the hours that are relevant to the campaign and will drive results. There's no wastage in that sense.

ALEX GRIEVES,
COMMERCIAL DIRECTOR, ADVANCED DOOH, GROUPM, UK



Controlling a campaign to a high extent means using screens only if useful and by that being more thoughtful with the overall playout. And above that, DOOH in general shows the lowest CO2 footprint per thousand contacts.

BRITTA CIFTCIOGLU,
DIRECTOR PLANNING & DEVELOPMENT DOOH, GROUPM, GERMANY



[prDOOH's] digital nature reduces the need for physical materials, and its precision targeting minimizes waste by ensuring ads are shown to relevant audiences.

CHLOE ZAHARKO, ASSOCIATE DIRECTOR, GROUPM, US

THE prDOOH JOURNEY IN PRACTICE: FROM PLANNING TO MEASUREMENT



WHERE DOES prDOOH FIT IN THE MEDIA PLAN?

Programmatic DOOH serves a diverse range of campaign strategies, proving vital for both brand-led (85%) and performance-led (91%) objectives^{16,17}. Notably, prDOOH rivals social media (85%) as a top choice for brand-led campaigns, even surpassing traditional DOOH (80%).

PrDOOH's versatility in driving both brand awareness and performance outcomes often leads marketers to integrate it with other channels for a holistic multi-channel approach.

Our survey shows that the vast majority of respondents (81%)¹⁸ are strategically combining direct and programmatic DOOH buys for performance-led campaigns, capitalising on the incremental reach and precise measurability that programmatic DOOH offers. This integrated approach, which leverages the strengths of both buying methods, has seen a significant increase in popularity compared to previous years, likely contributing to the overall growth in the volume of prDOOH campaigns.

To enhance brand-building efforts, social media is increasingly integrated with prDOOH (83%, +5ppt YoY for core markets)¹⁹. By leveraging social media data for prDOOH targeting, advertisers can ensure precise audience reach and campaign effectiveness.

Normally, we pair a programmatic campaign with social platforms like Meta, TikTok, Pinterest, LinkedIn. These are two channels that go hand-in-hand.

RODRIGO VALIM DE OLIVEIRA,
SENIOR PROGRAMMATIC MANAGER, IHG, UK

[prDOOH] is not just about brand, it's about how data can bring a lot of granularity, all the synergies we can create that are useful for performance...[Many] see DOOH as just a branding tool, but [with prDOOH] we can go much further than that.

PAOLA EPOUMA MPEMBE,
PROGRAMMATIC CONSULTANT,
HAVAS INTERNATIONAL PARIS

91%

OF MARKETERS SURVEYED BELIEVE THAT

**prDOOH IS
IMPORTANT FOR
PERFORMANCE-LED
CAMPAIGNS**

85%

BELIEVE THAT

**prDOOH IS
IMPORTANT FOR
BRAND-LED CAMPAIGNS**

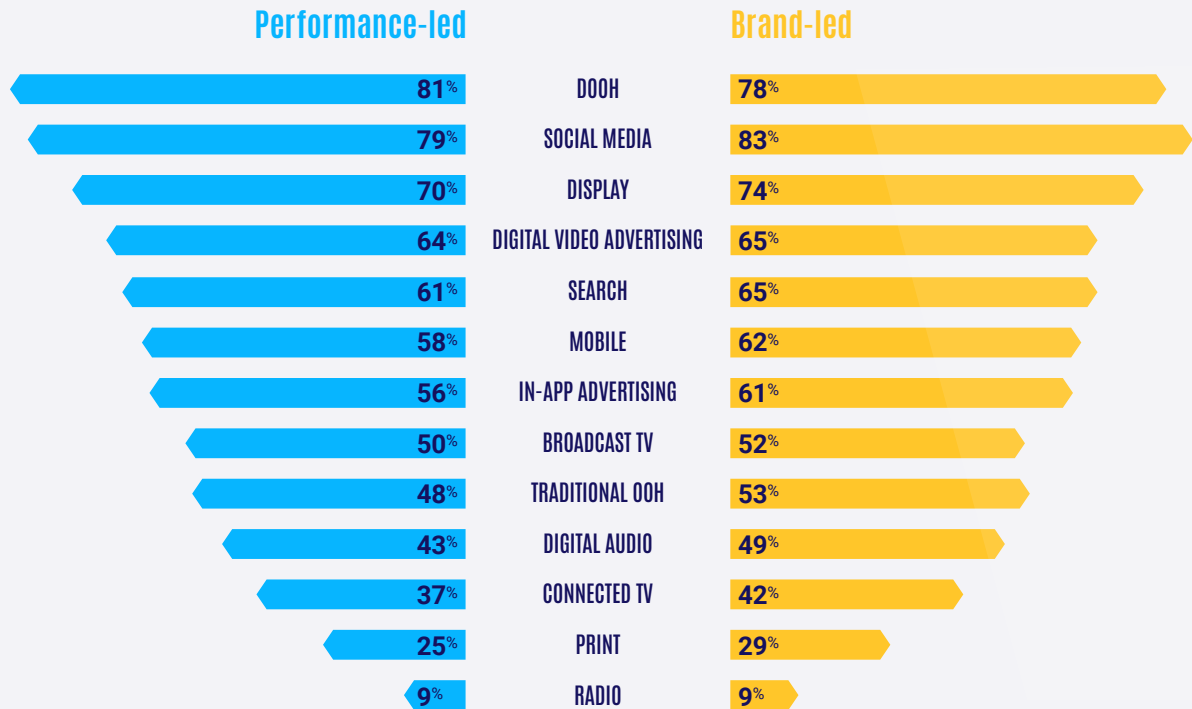
¹⁶ B4: What channels do you see as important for performance-led campaigns?

¹⁷ B5: What channels do you see as important for brand-led campaigns?

¹⁸ D1: Thinking about performance-led campaigns, which channels would you consider running programmatic digital out-of-home alongside?

¹⁹ D2: Thinking about brand-led campaigns, which channels would you consider running programmatic digital out-of-home alongside?

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



Source D1 / D2 Base size: Total (1200)



DOOH is and will always be a one-to-many medium. All the flexible options and data that talks to a group of relevant people for your campaign - this makes prDOOH very attractive.

BRITTA CIFTCIOGLU,
DIRECTOR PLANNING & DEVELOPMENT OOH, GROUPM, GERMANY

While direct-bought DOOH and social media remain the preferred complementary channels to prDOOH across markets, there are some notable exceptions. Both US and Brazilian marketers incorporate display advertising alongside their prDOOH strategies, but with different focuses:

US: Marketers combine prDOOH with display advertising (84%) and social media (84%) to bolster prDOOH brand campaigns

Brazil: Marketers utilise prDOOH alongside display advertising (76%) and direct-bought DOOH (77%) to enhance prDOOH performance campaigns

[prDOOH] is a versatile way of complementing traditional OOH by reinforcing a message within an in-market or high value audience, which can be performance based or brand based.

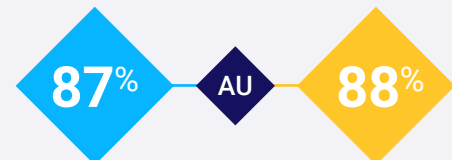
MICHAEL WHITESIDE,
CHIEF MEDIA ACTIVATIONS OFFICER, KINESSO, AUSTRALIA

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

CHLOE ZAHARKO,
ASSOCIATE DIRECTOR, GROUPM, US

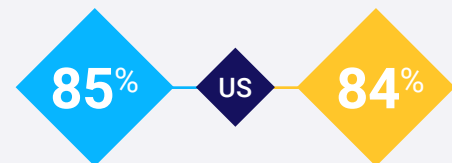
THINKING ABOUT PERFORMANCE-LED / BRAND-LED CAMPAIGNS, WHICH CHANNELS WOULD YOU CONSIDER RUNNING PROGRAMMATIC DIGITAL OUT-OF-HOME ALONGSIDE?

◆ PERFORMANCE-LED ◆ BRAND-LED



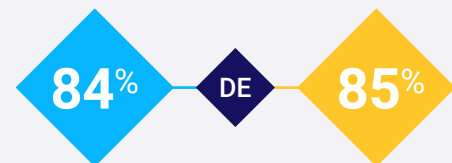
DOOH

SOCIAL MEDIA



SOCIAL MEDIA

SOCIAL MEDIA



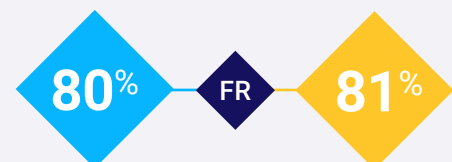
DOOH

SOCIAL MEDIA



SOCIAL MEDIA

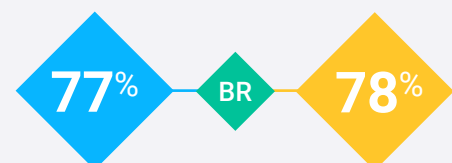
SOCIAL MEDIA



DOOH

SOCIAL MEDIA

CORE MARKETS



DOOH

DOOH

GUEST MARKET

Source D1 / D2 Base size: Total (1200)
US (200), UK (200), AU (200), FR (201), DE (200), BR (199).

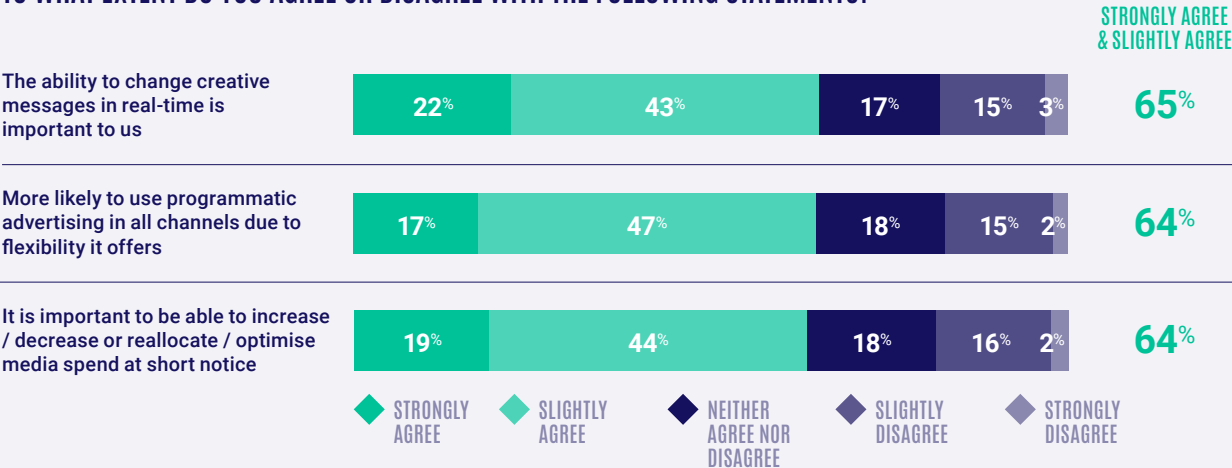
HOW IS prDOOH PLANNED?

Survey results underscore marketers' continued preference for the dynamic capabilities of programmatic in media planning.

The ability to adjust creative messaging in real time remains a top priority in media planning (65%), growing 3 percentage points year-over-year in core markets²⁰. Programmatic buying's flexibility is also increasingly appealing to marketers (64%), growing 7 percentage points year-over-year in core markets.

This aligns with the growing importance of agile media spend optimisation (64%, a 3 percentage point increase year-over-year in core markets), a need that prDOOH is uniquely positioned to fulfil.

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)

When considering campaign planning and buying, marketers globally prioritise three key factors equally: alignment of channel capabilities with campaign goals (35%), brand fit (35%), and channel scalability based on inventory and coverage (35%)²¹.

TOP 3 MOST IMPORTANT FACTORS WHEN
PLANNING AND BUYING MEDIA



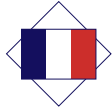
Source B8 Base size: Total (1200)

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?
21 B8: How important are the following factors in your media planning and buying decisions?

However, some differences by market emerge:



Australia: Marketers place slightly greater emphasis on reaching their target audience (39% vs. 34% globally)



France: Marketers prioritise ease of campaign buying and management (37% vs. 34% globally)



UK: Projected ROI ranks among the top three factors (39% vs. 34% globally), along with a greater focus on sustainability (35% vs. 31% globally)



US: Ease of buying and managing a channel (39% vs. 34% globally) and the budget required to achieve meaningful results (37% vs. 31% globally) are prioritised more heavily



Germany: Marketers demonstrate a stronger preference for brand fit compared to their global counterparts (41% vs. 35% globally)



Brazil: Marketers place a greater emphasis on achieving meaningful results than those in other surveyed markets (33% vs. 31% globally)

Additionally, the growing emphasis on sustainability, now a top-three factor for nearly a third of marketers globally (31%), highlights a promising trend towards eco-conscious marketing practices, an area where prDOOH demonstrates a clear advantage.

For more information on VIOOH's carbon emissions calculation, click [here](#).

MARKET DIFFERENCES IN TOP MOST IMPORTANT FACTORS WHEN PLANNING AND BUYING MEDIA



39%

Ease of buying
vs. 34% globally



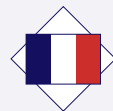
39%

Projected ROI
vs. 34% globally



35%

Target audience
vs. 34% globally



37%

Ease of buying
vs. 34% globally



41%

Brand fit
vs. 35% globally



33%

Achieving meaningful results
vs. 31% globally

37%

Achieving meaningful results
vs. 31% globally

35%

Sustainability
vs. 31% globally

'For now, we only buy by location, but we plan to have a mix of audience and location [buying] in future to maximise impact. Right now, it's quite complicated to retarget your audience when you buy only by location.'

CHLOÉ RAUCH,
SENIOR DISPLAY & PROGRAMMATIC CONSULTANT,
ARTEFACT, FRANCE

Predominantly the briefs are audience-based with a geographic layover. There is sometimes a preference for format type within that as well, whether it's bus shelters, retail, gyms, etc.

KATHERINE POCHROJ,
SYDNEY HEAD OF MEDIA SOLUTIONS & INVESTMENT,
ESSENCEMEDIACOM, GROUPM, AUSTRALIA

We offer several solutions: one that focuses on audience, another on location, and a third that combines both. This approach ensures an audience-first strategy while delivering contextually relevant content in specific locations.

ALEX GRIEVES,
COMMERCIAL DIRECTOR, ADVANCED DOOH, GROUPM, UK

The ability to apply targeting selectivity is prDOOH's superpower, to focus on a certain audience cohort, whether incremental, high-value, in-market or proximity-based, building frequency of message amongst that audience in specific areas.

MICHAEL WHITESIDE,
CHIEF MEDIA ACTIVATIONS OFFICER, KINESSO, AUSTRALIA



83%

OF MARKETERS SURVEYED ARE
SOMEWHAT OR DEFINITELY LIKELY
TO CONSIDER A SOLUTION THAT

**PRIORITISES REACHING
TARGET AUDIENCES
IN RELEVANT
ENVIRONMENTS**

Q At what stage in the media planning and buying process do marketers typically incorporate prDOOH into their campaigns?

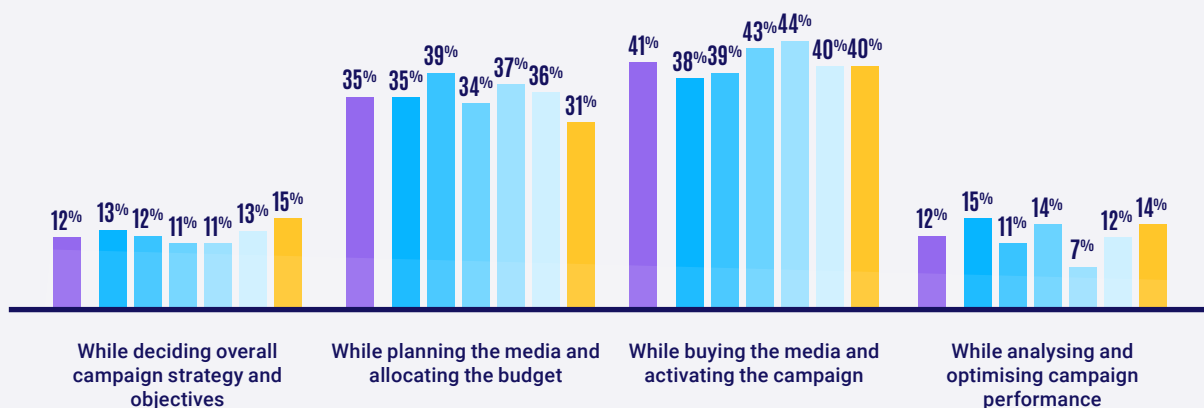
The flexibility of programmatic buying allows marketers to seamlessly incorporate prDOOH into their campaigns at various stages.

The most common point of entry for incorporating prDOOH into campaigns is during media buying and activation (41% globally, a 10 percentage point year-over-year increase in core markets)²². **This trend is particularly evident when marketers reallocate budgets from other digital (47%) and traditional channels (50%).**

A notable shift is emerging, however, with a significant portion of marketers – particularly in the UK (39% vs. 35% globally) – proactively integrating prDOOH into their initial media planning and budget allocation stages. **This trend is even more pronounced among those allocating new budgets for prDOOH (45%).** This strategic shift suggests a growing recognition of prDOOH's value beyond tactical execution, positioning it as a core component of overall campaign strategy²³.

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

◆ GLOBAL ◆ US ◆ UK ◆ AU ◆ FR ◆ DE ◆ BR



Source C12 Base size, Total (1200), US (200), UK (200), AU (200), FR (201), DE (200), BR (199).

²² C12: While planning a campaign, when in the media planning process is the decision to include programmatic digital out-of-home typically happening?
²³ 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?

Q Which players are involved in planning and buying prDOOH campaigns?

Globally, OOH specialist agencies remain the dominant force in prDOOH campaign planning and buying (76%)²⁴, with their market share increasing year-over-year (+16 percentage points in core markets). This dominance is particularly pronounced in the US, where 84% of advertisers rely on these specialised agencies, underscoring the value of their expertise in navigating the complexities of OOH media, and understanding outdoor audience behaviour.

Conversely, general media agencies have seen a decline (-15 percentage points year-over-year in core markets) in their share of prDOOH planning and buying. This shift may be attributed to the upskilling of OOH agencies in programmatic and the growing popularity of demand-side platforms (DSPs), which offer advertisers more direct control and access to a wider range of inventory.

In fact, **the utilisation of DSP managed services has experienced the most significant growth (46%), with a substantial 21 percentage point increase year-over-year in core markets.**

This surge reflects a growing demand for programmatic solutions that enable precise targeting of specific demographics and interests, moving beyond location-based buying alone. It also highlights the increasing recognition of prDOOH as a valuable addition to broader digital multi-channel strategies.

The shift towards audience-based buying in prDOOH is further evidenced by survey results showing that the vast majority of marketers (83%) are likely to adopt solutions prioritising audience reach in relevant environments, rather than simply purchasing specific locations²⁵. This trend is particularly pronounced in the UK, where 91% of respondents recognise the value of this audience-centric approach.

prDOOH setups are more and more sophisticated and within the sales funnel programmatic approaches are perfect to individually strengthen the lower level, either within a data-driven DOOH only campaign or even a mixed media channel approach to activate the advertiser's target group.

BRITTA CIFTCIOGLU,
DIRECTOR PLANNING & DEVELOPMENT OOH,
GROUPM, GERMANY

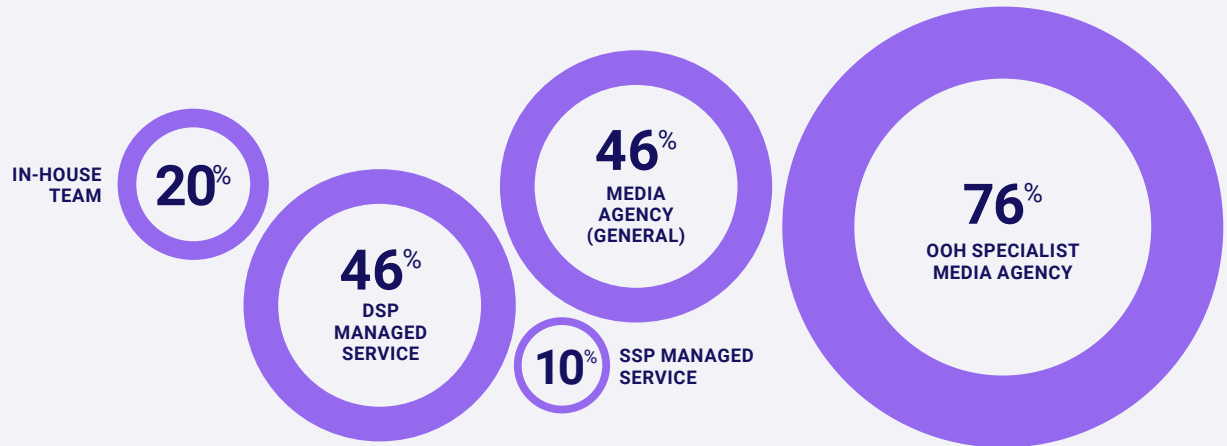
Initially, we used [prDOOH] primarily for branding campaigns, but now, with the various size options and inventory available on the DSP, we are able to use it for campaigns of different sizes and strategies. For example, the smaller formats in elevators, which we have been using extensively for consideration campaigns.

ISABELLA RODRIGUES,
EXECUTIVE DIRECTOR, CLIENT SOLUTIONS,
ESSENCEMEDIA.COM, GROUPM, BRAZIL

²⁴ C1: Who has typically been responsible for planning and buying programmatic digital out-of-home in the last 12 months?

²⁵ D6: Thinking about how you expect to place, plan, or buy programmatic digital out-of-home advertising in the next 18 months, how likely are you to consider solutions that prioritise reaching your target audience in relevant environments even if you can't choose the specific media owner and/or the exact location of the ad display isn't guaranteed?

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 Total (360)

An audience-centric approach for 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

It's [the agencies] responding to the brief, and saying (based on the objectives, whether that's from an audience location or actual business objective point of view), that prDOOH is the right fit within the mix.

KATHERINE POCHROJ,
SYDNEY HEAD OF MEDIA SOLUTIONS & INVESTMENT,
ESSENCEMEDIA.COM, GROUPM, AUSTRALIA

We try to have an audience-first approach. We have a persona in mind and we try to tap into what kind of traits that persona would have. Then we think, is there any audience that would be tapped into those sort of traits for that kind of persona? When we do not have that capability, then we can tap into other kinds of targeting, like contextual, geotargeting, or demographics.

RODRIGO VALIM DE OLIVEIRA,
SENIOR PROGRAMMATIC MANAGER, IHG, UK

Q Within agencies, who buys prDOOH?

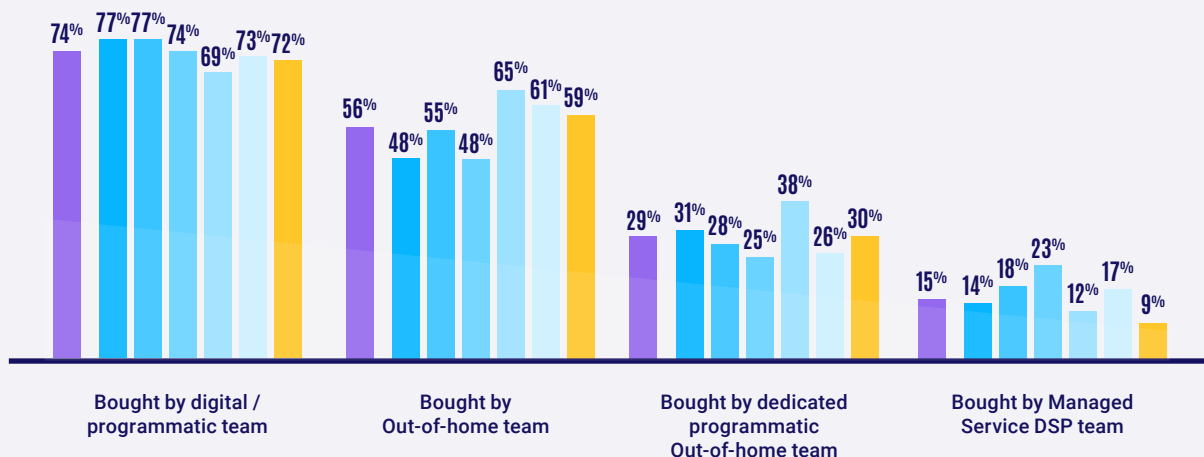
The allocation of prDOOH buying responsibilities within agencies has evolved since 2023.

Digital and programmatic teams are now leading the charge, overseeing prDOOH purchases for nearly three quarters (74%) of the marketers we surveyed. This represents a substantial 22 percentage point year-over-year increase in core markets²⁶, underscoring the growing integration of prDOOH into comprehensive multi-channel digital marketing strategies.

However, OOH teams remain significantly involved, overseeing prDOOH buys for just over half (56%) of surveyed marketers (an 8 percentage point decrease year-over-year in core markets). This suggests a need for continued collaboration between digital / programmatic and OOH teams to leverage their respective expertise and maximise the effectiveness of prDOOH campaigns.

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

◆ GLOBAL ◆ US ◆ UK ◆ AU ◆ FR ◆ DE ◆ BR



Source C3 Base size, all respondents who place prDOOH Total (774), US (145), UK (137), AU (126), FR (120), DE (130), BR (116).

Q What are the buying options for prDOOH?

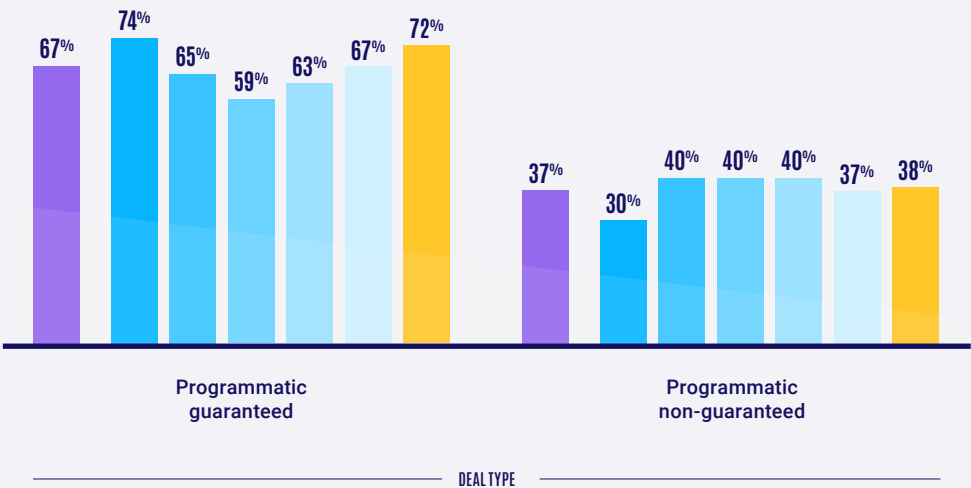
Programmatic DOOH offers marketers a diverse range of buying options for purchasing out-of-home ad space.

While programmatic guaranteed deals remain the most popular deal-type globally (67%)²⁷, non-guaranteed deals are rapidly gaining traction, with over a third (37%) of marketers now using non-guaranteed deals, an 11 percentage point increase from 2023 that outpaces the 9 percentage point growth of guaranteed deals.

This shift highlights a growing preference for flexible, audience-based purchasing over securing specific placements.

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

◆ GLOBAL ◆ US ◆ UK ◆ AU ◆ FR ◆ DE ◆ BR



Source B10 Base size, all respondents who place prDOOH Total (774), US (145), UK (137), AU (126), FR (120), DE (130), BR (116).

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

HOW IS prDOOH MEASURED?

Measurement and attribution of prDOOH campaigns remain a topic of ongoing discussion due to the inherent complexities of measuring this one-to-many channel, compared to the more established methods used to measure one-to-one digital channels.

Similar to 2023 findings, our survey shows that marketers prioritise performance metrics such as sales uplift and website traffic to gauge prDOOH campaign success.

In fact, sales uplift (47%) is the primary metric used in prDOOH attribution, particularly in the US (60%) and UK (53%), underscoring a focus on tangible results. This emphasis on bottom-line impact demonstrates prDOOH's effectiveness in influencing consumer behaviour²⁸. Additionally, website traffic (43%) emerges as another popular metric, highlighting a growing awareness of prDOOH's offline influence on online behaviour.

However, alternative measurement approaches are also utilised. Measuring brand awareness and purchase consideration through audience surveys is particularly prevalent in the US (43%) and Brazil (41%).

We're looking at target impressions, play reports, 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

OOH is a [high] impact format. The key metrics [to measure] are those impact metrics such as impressions, the number of people reached, and the number of interactions.

ANA RAQUEL HERNANDES,
HEAD OF FLUID, INITIATIVE, BRAZIL

We are still using offline KPIs with DOOH, such as impressions and cost per impact, and most of our purchases are still being made through private deals on the DSP. We need to evolve our buying approach to increasingly integrate with broader digital campaigns.

ISABELLA RODRIGUES,
EXECUTIVE DIRECTOR, CLIENT SOLUTIONS,
ESSENCEMEDIACOM, GROUPM, BRAZIL

Additionally, attention-based measurement is gaining traction, although adoption remains limited. Just over a third of respondents are currently utilising it, with advertisers (38%) slightly outpacing agencies (34%).

Cross-channel measurement remains a blind spot for many marketers, with 43% expressing a desire for more information on how to effectively evaluate prDOOH's impact across the entire marketing funnel.

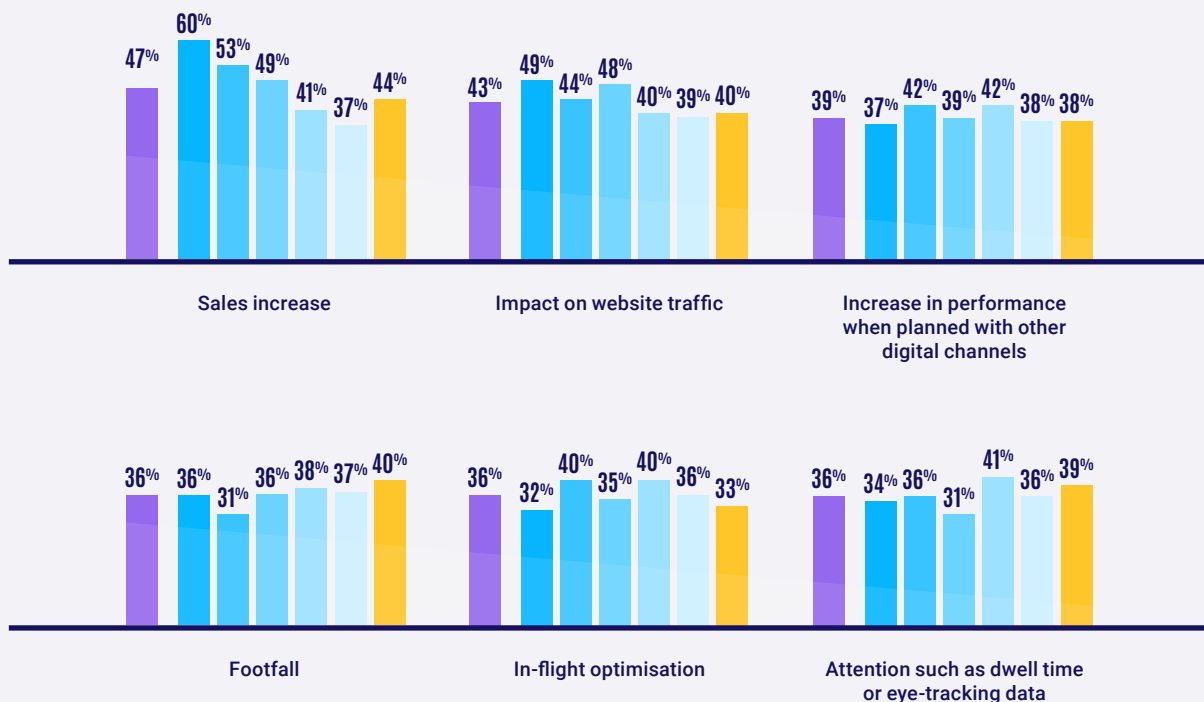
This demand has grown by 5 percentage points year-over-year in core markets²⁹, revealing a continuing need for robust attribution models that accurately capture prDOOH's influence on both online and offline consumer behaviour.

We use attention metrics when it comes to format selection, but in terms of measurement, it's not something that's made big strides in Australia. We're using attention metrics across other channels and other formats, but it's not something that I've seen a lot of in this space.

KATHERINE POCHROJ,
SYDNEY HEAD OF MEDIA SOLUTIONS & INVESTMENT,
ESSENCEMEDIA.COM, GROUPM, AUSTRALIA

HOW DO YOU SEE PROGRAMMATIC DIGITAL OUT-OF-HOME BEING ATTRIBUTED / MEASURED?

GLOBAL US UK AU FR DE BR



We've tested some of this technology, but we're not really using [attention metrics] as a measuring stick right now.

JUSTIN SYMONS,
HEAD OF INVESTMENT, RAPPORT, US

Source D5 Base size, Total (1200), US (200), UK (200), AU (200), FR (201), DE (200), BR (199).

BEYOND STATIC: THE DCO ERA OF prDOOH



As marketers explore the expansive capabilities of prDOOH, we've observed a rise in the adoption of Dynamic Creative Optimisation (DCO).

In the five core markets, nearly all surveyed marketers (95%) recognise the potential benefits of DCO for prDOOH campaigns, with many either considering, testing, or actively utilising it to enhance campaign effectiveness³⁰. Due to the relative nascency of prDOOH in Brazil, this topic was not explored in depth in the Brazil research.

DCO unlocks a number of opportunities for prDOOH campaigns, enhancing their effectiveness and efficiency. Key benefits cited by marketers include:

Creative flexibility (42%)


DCO allows advertisers to easily tailor creative assets to specific audiences, locations, or real-time conditions, ensuring maximum relevance and engagement

Improved relevance (40%)

By delivering content and messaging that resonates with viewers in the moment, DCO significantly boosts campaign relevance and impact

Optimised ad spend (38%)³¹

By delivering content tailored to specific audiences, DCO optimises ad spend, focusing on those most likely to engage with a product or brand



The ability to deliver creative in an adaptive, contextually relevant, and automated way using data signals (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

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

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

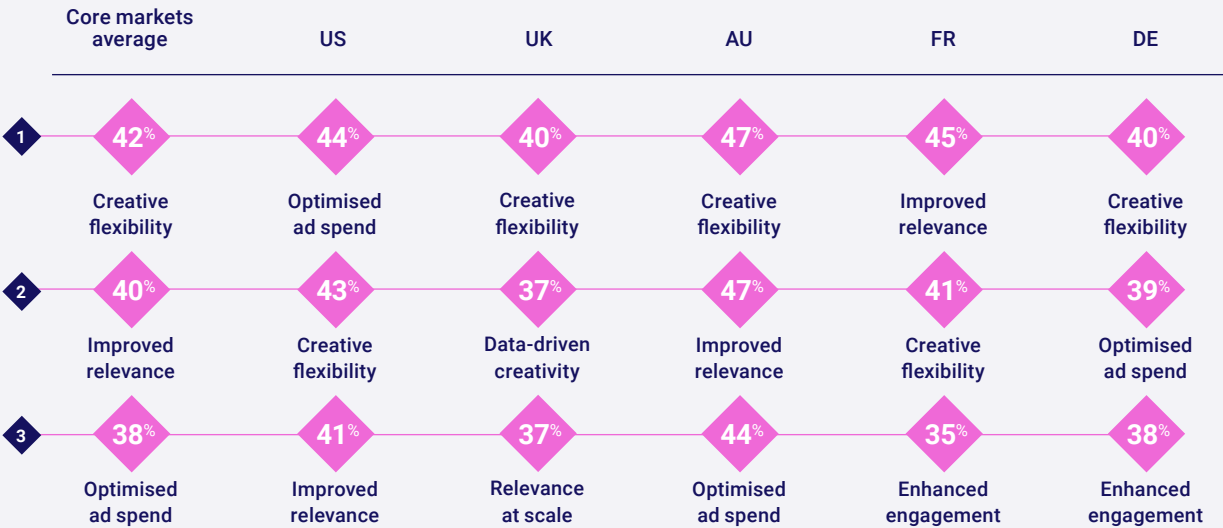
In addition, the real-time adaptability of DCO is a key factor driving its appeal, especially in Australia (37%), the US (36%), and the UK (34%). This agility allows marketers to swiftly respond to trends or events, further amplifying the effectiveness of prDOOH campaigns.

However, there remains significant potential for wider adoption. **Currently, only 9% of marketers actively integrate DCO into their campaigns, with US marketers leading the way at 16%.**



OF MARKETERS IN THE US ARE ACTIVELY
**INTEGRATING DCO
INTO THEIR prDOOH
CAMPAIGNS**

WHICH, IF ANY, OF THE FOLLOWING POTENTIAL BENEFITS
CAN DYNAMIC CREATIVE OPTIMISATION (DCO) OFFER FOR
PROGRAMMATIC DIGITAL OUT-OF-HOME ADVERTISING?



Source D9 Base size, all respondents who do not use DCO or consider using it in the future Total (517)
US (101), UK (106), AU (116), FR (106), DE (DE), Question not asked in BR.

I think most clients would benefit from [DCO]. Activating DCO [makes audiences] feel closer to the brand because they think the brand understands them, and knows what they need.

CHLOÉ RAUCH,
SENIOR DISPLAY & PROGRAMMATIC CONSULTANT,
ARTEFACT, FRANCE

Interestingly, advertisers are embracing DCO at a higher rate (11%) than media agencies (6%). This suggests an opportunity for agencies to bridge the gap by upskilling their teams and demonstrating the power of DCO to clients.

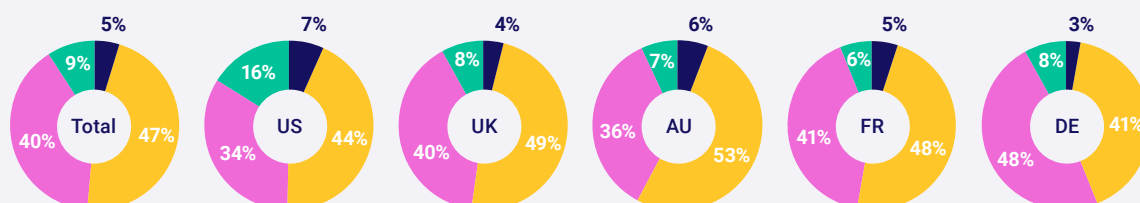
To do this effectively, agencies are seeking more training on DCO campaign possibilities (45%) and more competitive pricing for DCO implementation (46%)³².

DCO is a regular component of our prDOOH campaigns. For us, DCO is important when campaigns need to reach the target group in a unique and data-driven way and the messages need to offer the viewer an exceptional experience. The use of DCO not only makes the client's approach more individualised to the target group, but also demonstrably increases the viewers' attention many times over.

LAURA HENTSCHEL,
HEAD OF PROGRAMMATIC & DIGITAL MEDIA IT WORKS, GERMANY

DO YOU CURRENTLY INTEGRATE DYNAMIC CREATIVE OPTIMISATION (DCO) INTO YOUR PROGRAMMATIC DIGITAL OUT-OF-HOME ADVERTISING?

- ◆ DO NOT USE DCO
- ◆ CONSIDERING USING DCO IN THE FUTURE
- ◆ PILOTING / TESTING DCO CURRENTLY
- ◆ ACTIVELY INTERGRATE DCO INTO CAMPAIGNS



Source D7 Base size, Total (1001)
US (200), UK (200), AU (200), FR (201), DE (200). Question not asked in BR.

I have clients that have used DCO, and are using DCO, that are activating it addressably with prDOOH. This is definitely something that will grow as more and more case studies come out about the increased effectiveness of DCO addressable media within the prDOOH space.

KATHERINE POCHROJ,
SYDNEY HEAD OF MEDIA SOLUTIONS & INVESTMENT,
ESSENCEMEDIACOM, GROUPM, AUSTRALIA

[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

I know that from a creative point of view, there are clients that are using AI to generate their creative that's running on prDOOH in the same way they're generating social and display assets using AI technology.

KATHERINE POCHROJ,
SYDNEY HEAD OF MEDIA SOLUTIONS & INVESTMENT,
ESSENCEMEDIACOM, GROUPM, AUSTRALIA

DCO is leveraged if applicable, whilst dynamic triggers are also widely used to capitalise on moments of receptivity or select times of day and week.

MICHAEL WHITESIDE,
CHIEF MEDIA ACTIVATIONS OFFICER, KINESSO, AUSTRALIA

While DCO offers significant potential for prDOOH campaigns, its wider adoption is hindered by three main barriers: budgetary constraints (49%), training needs (47%), and limited access to necessary data sources (46%)³³.

WHICH OF THE FOLLOWING, IF ANY, ARE PREVENTING YOU FROM ADOPTING DYNAMIC CREATIVE OPTIMISATION (DCO) FOR PROGRAMMATIC DIGITAL OUT-OF-HOME ADVERTISING?

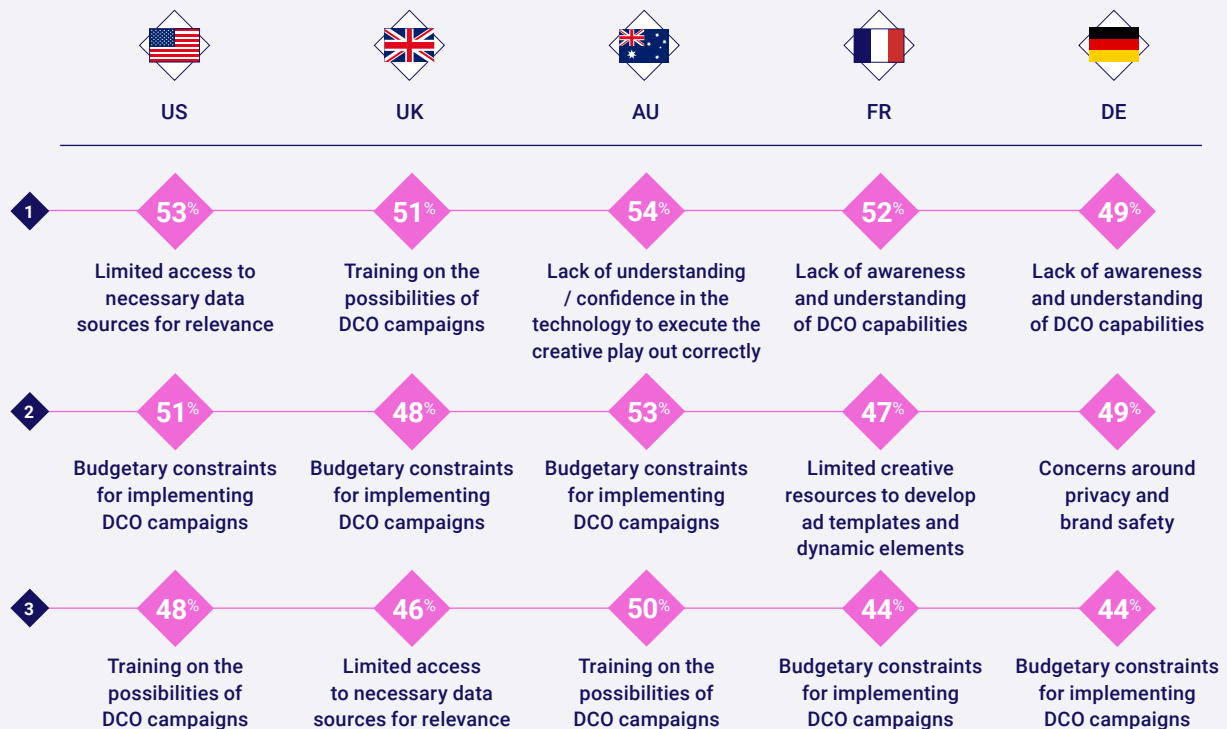


Source D8 Base size, all respondents who do not use DCO or consider using in the future.
Total (517) Question not asked in BR.

Advertisers, in particular, express less comfort with DCO's technical aspects (45%) compared to media agencies (36%) and face greater challenges with data limitations (51% vs. 41%). This highlights a potential knowledge gap that can be bridged through comprehensive education and training initiatives tailored for advertisers.

Across markets, challenges surrounding DCO adoption vary, highlighting the need for tailored, market-specific approaches to overcome these hurdles. In Australia, a lack of understanding and confidence in DCO technology (54%) is a significant barrier, suggesting a need for targeted education and awareness initiatives. French marketers are more concerned with limited creative resources for developing ad templates and dynamic elements (47%), while privacy and data safety concerns are most pronounced in Germany (49%).

WHICH OF THE FOLLOWING, IF ANY, ARE PREVENTING YOU FROM ADOPTING DYNAMIC CREATIVE OPTIMISATION (DCO) FOR PROGRAMMATIC DIGITAL OUT-OF-HOME ADVERTISING?



Source D8 Base size, all respondents who do not use DCO or consider using in the future.
Total (517) US (101), UK (106), AU (116), FR (106), DE (88), Question not asked in BR.

[Clients] are new to the prDOOH space. They're used to, from an OOH perspective, that standard, static creative. They're still trying to realize the benefits and all the opportunities and options that they have. They have to crawl before they walk.

JUSTIN SYMONS, HEAD OF INVESTMENT, RAPPORT, US

The ad serving costs for DCO are so high... I think costs and expertise are the two main barriers for adoption of DCO.

RODRIGO VALIM DE OLIVEIRA,
SENIOR PROGRAMMATIC MANAGER, IHG, UK

STATE OF THE
NATION

Programmatic DOOH 2024

KEY CHALLENGES AND FUTURE OPPORTUNITIES FOR prDOOH



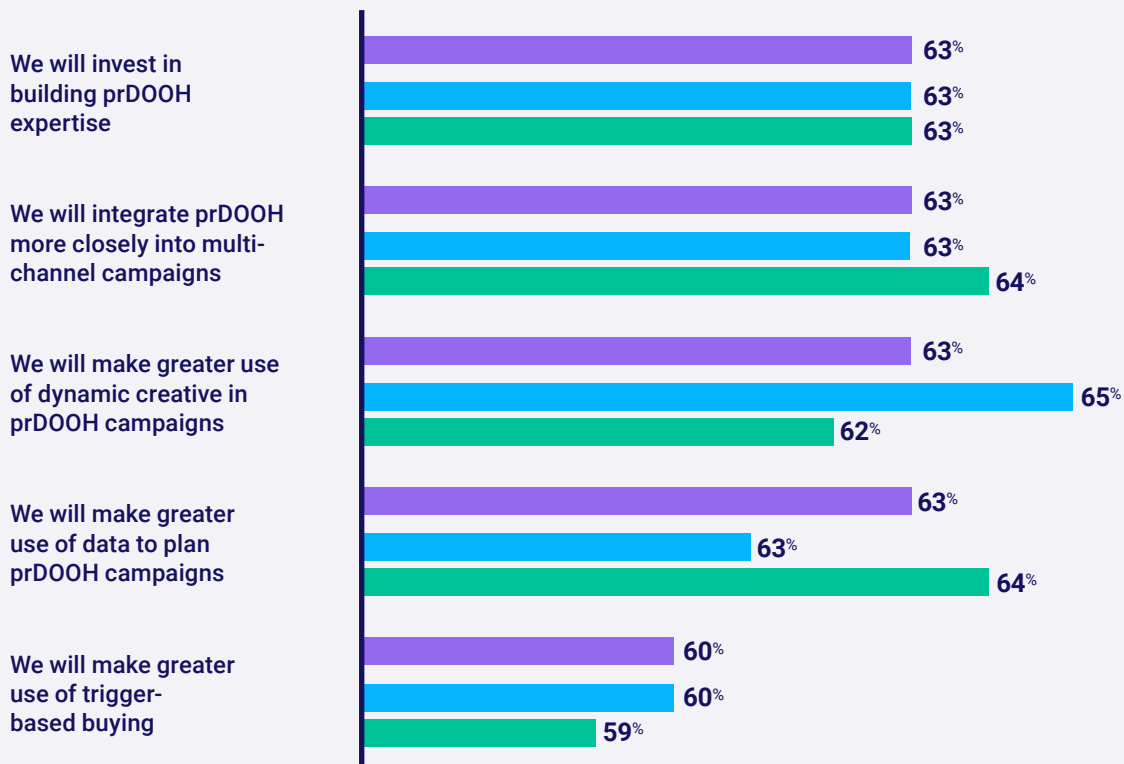
Overall, the outlook for prDOOH remains bright. Globally, the majority of marketers plan to continue investing in building out their prDOOH expertise (63%, 0ppt YoY for core markets)³⁴.

They also intend to integrate prDOOH more closely into multi-channel campaigns (63%, +1ppt YoY for core markets), utilise more data-driven insights (63%, +4ppt YoY) and increase their use of dynamic creative (63%, +5ppt YoY for core markets).

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?

% WHO AGREE WITH STATEMENT

◆ AVERAGE
◆ MEDIA AGENCY
◆ ADVERTISER



Source C14 Base size Total (1200) Media agency (599) Advertiser (601)

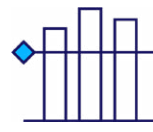
However, as highlighted in VIOOH's previous State of the Nation reports, significant challenges persist, primarily the lack of universal measurement standards and fragmented data availability. These hinder marketers' ability to demonstrate ROI and measure prDOOH campaign performance effectively. While educational efforts are clearly playing an important role in increasing adoption, continued investment in education is crucial to ensure that the growing number of marketers entering the prDOOH space fully understand its benefits and can effectively leverage its capabilities.

To unlock prDOOH's full potential, marketers globally are calling for:



In-depth training on the benefits of prDOOH

In-depth training on the unique advantages of prDOOH would help marketers better understand its value (demand for this has grown +16ppt YoY in core markets).³⁵



Standardisation in KPIs and measurement for prDOOH

This is crucial for advertisers to accurately evaluate prDOOH campaign success.

Demand for standardisation has remained consistent in core markets since last year, highlighting its ongoing importance.³⁶



Deeper audience insights

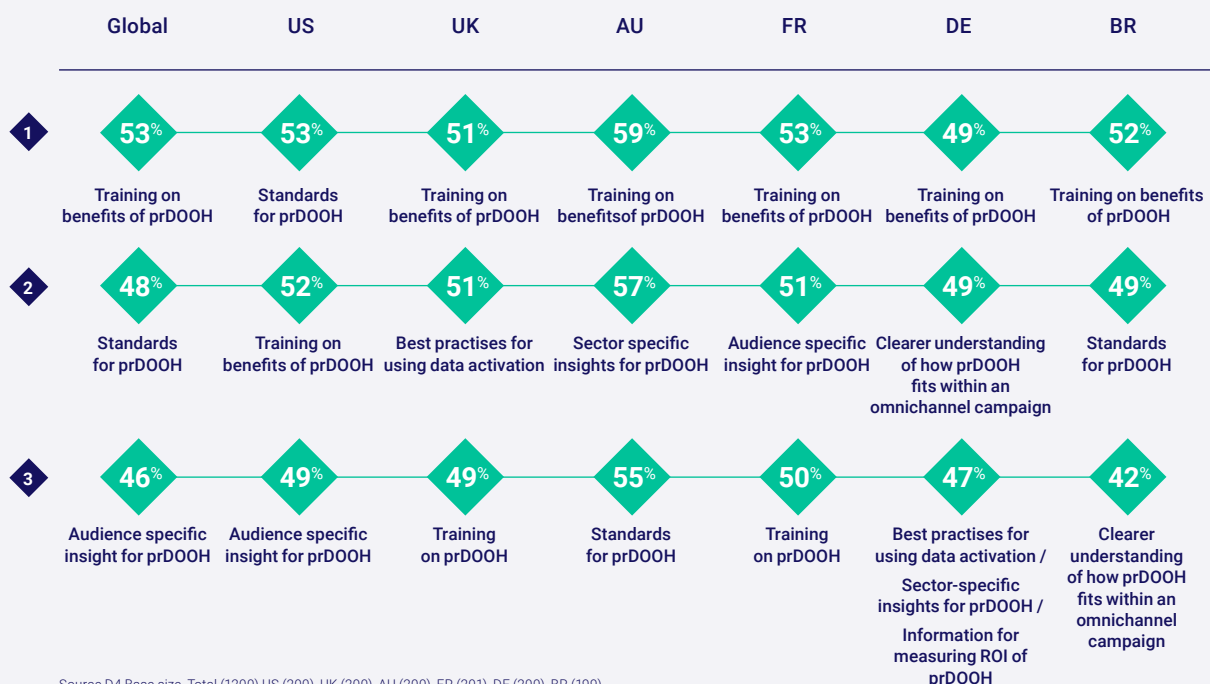
Improved granularity of and access to audience data is essential for effective targeting and campaign optimisation, with demand for both significantly increasing in core markets year-over-year (access by +6 ppts and granularity by +10ppts).³⁷



The ability to buy prDOOH in predefined packages

Predefined packages can streamline campaign planning and execution by offering inventory that aligns with specific targeting needs, eliminating the complexities of navigating varying placement types and rates across different media owners (demand for this has grown +12ppt YoY in core markets).³⁸

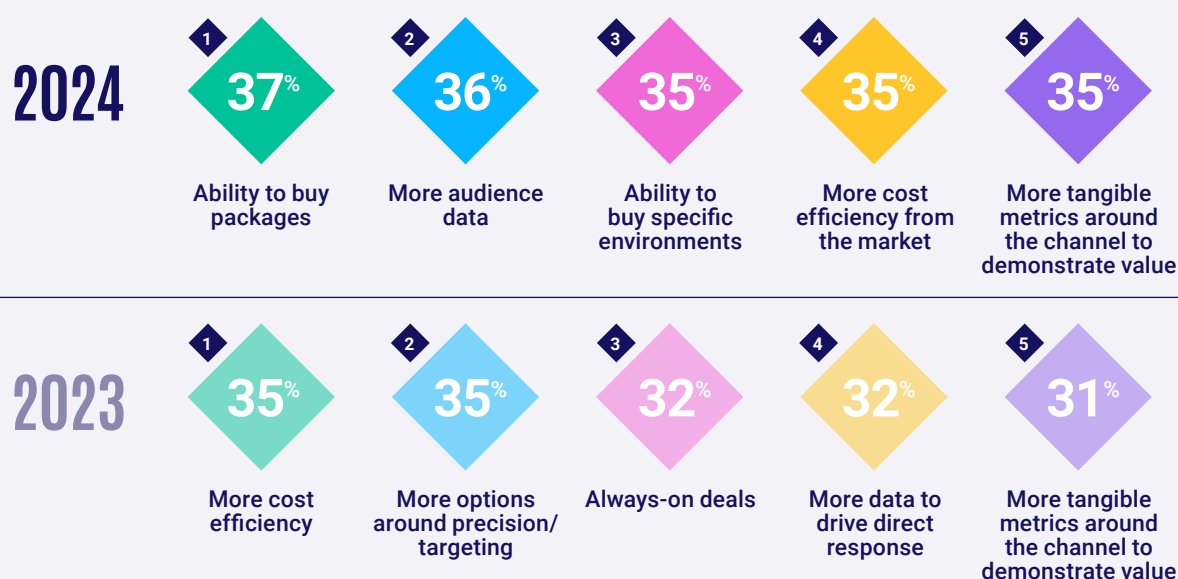
WHICH, OUT OF THE FOLLOWING, WOULD HELP YOU LEARN ABOUT PROGRAMMATIC DIGITAL OUT-OF HOME ADVERTISING?



35, 36 D4: Which, out of the following, would help you learn more about programmatic digital out-of-home advertising?

37, 38 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?

TOP 5 BARRIERS TO ADOPTION (ACROSS CORE MARKETS): 2024 VS 2023

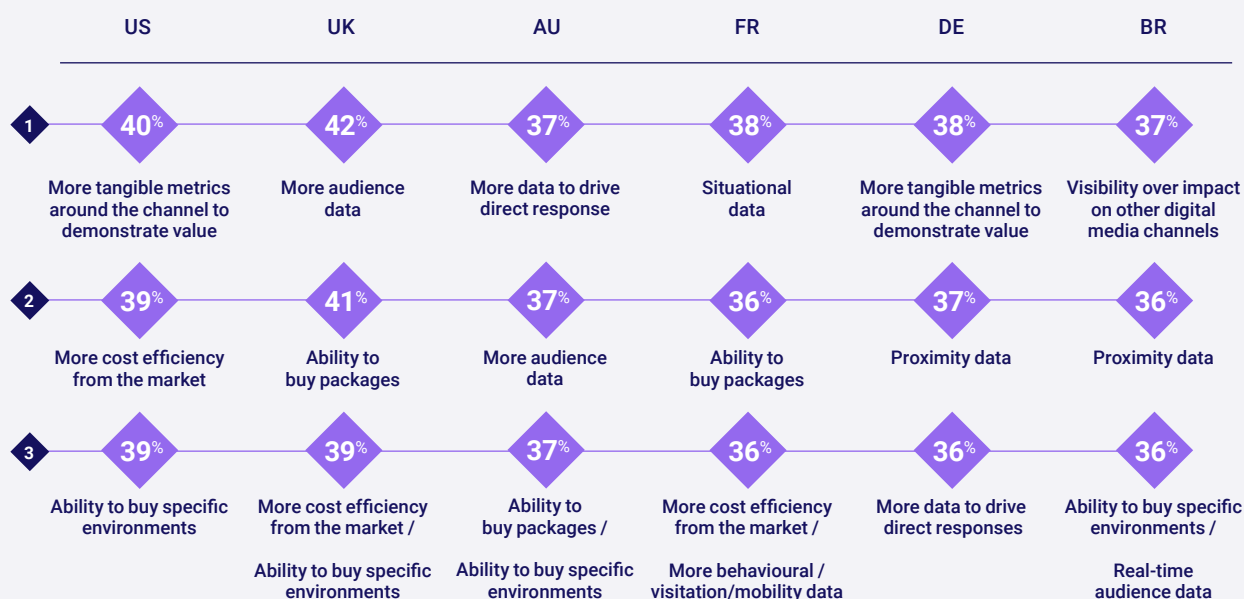


Please note that scores for 2024 / 2023 are calculated based on core markets only (US, UK, AU, FR, DE)

Source: 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? Base size, total (1200)

While some barriers to investment remain, it's encouraging to see the industry addressing advertiser and agency needs. Concerns around precision targeting and always-on deals, which were previously in the top 5 barriers to investment, have diminished in importance since 2023, indicating progress in overcoming these challenges.

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), US (200), UK (200), AU (200), FR (201), DE (200), BR (199).

Inventory is crucial to the development of programmatic OOH. Media owners must continue to commit inventory and invest in the necessary technology for its delivery. Beyond that, we must keep innovating in areas such as planning, creativity, and verification to drive programmatic DOOH forward.

ALEX GRIEVES,
COMMERCIAL DIRECTOR, ADVANCED DOOH, GROUPM, UK

More insights and studies that highlight the effectiveness of prDOOH will help advertisers and agencies to understand why they should spend advertising budget in this channel.

BRITTA CIFTCIOGLU,
DIRECTOR PLANNING & DEVELOPMENT OOH,
GROUPM, GERMANY

Actionable audiences is still a challenge in a country like Brazil, as we still have many parts of the country that are not covered by DOOH. Training people to use the tools in general, and providing education on how to build and activate audiences [would help].

ANA RAQUEL HERNANDES, HEAD OF FLUID, INITIATIVE, BRAZIL

If we could have a better understanding about other channels within programmatic, how attribution works across channels - for example how one channel can contribute to another in terms of awareness uplift or a conversion - that would help.

RODRIGO VALIM DE OLIVEIRA,
SENIOR PROGRAMMATIC MANAGER, IHG, UK

From a comms planning perspective, [growth will come from] familiarising programmatic teams with the role of the channel and also familiarising traditional teams with what's possible in-platform and the versatility of programmatic.

MICHAEL WHITESIDE,
CHIEF MEDIA ACTIVATIONS OFFICER, KINESSO, AUSTRALIA

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

CHLOE ZAHARKO, ASSOCIATE DIRECTOR, GROUPM, US

WHAT DRIVES INTENT TO CONSIDER prDOOH IN THE FUTURE?



As part of this year's research we conducted a decision tree analysis (CHAID, Chi-squared Automatic Interaction Detector algorithm) to better understand the factors influencing consideration for buying prDOOH in the future.

The key driver for future programmatic DOOH adoption, according to the decision tree, is the use of dynamic creative in prDOOH campaigns. Notably, respondents who leverage dynamic creative are more likely to consider prDOOH in the future.

The next most significant factor is the perception that prDOOH offers innovative targeting methods. Respondents who agree, even slightly, that prDOOH offers innovative ways to target consumers show an increased likelihood of consideration.

Further down the decision tree, the importance of proof-of-play reporting³⁹ emerges as a differentiating factor, with those valuing it highly more likely to consider prDOOH in future.

Additionally, expressing an increased willingness to use data for prDOOH campaign planning and emphasising the importance of integrating prDOOH into a multi-channel strategy are also key predictors of future consideration.

Overall, key drivers of future prDOOH consideration include its perceived ability to provide dynamic creative opportunities, innovative targeting methods, and the importance of proof-of-play reporting. Use of data for campaign planning and the perceived importance of omni-channel integration are also important predictors.

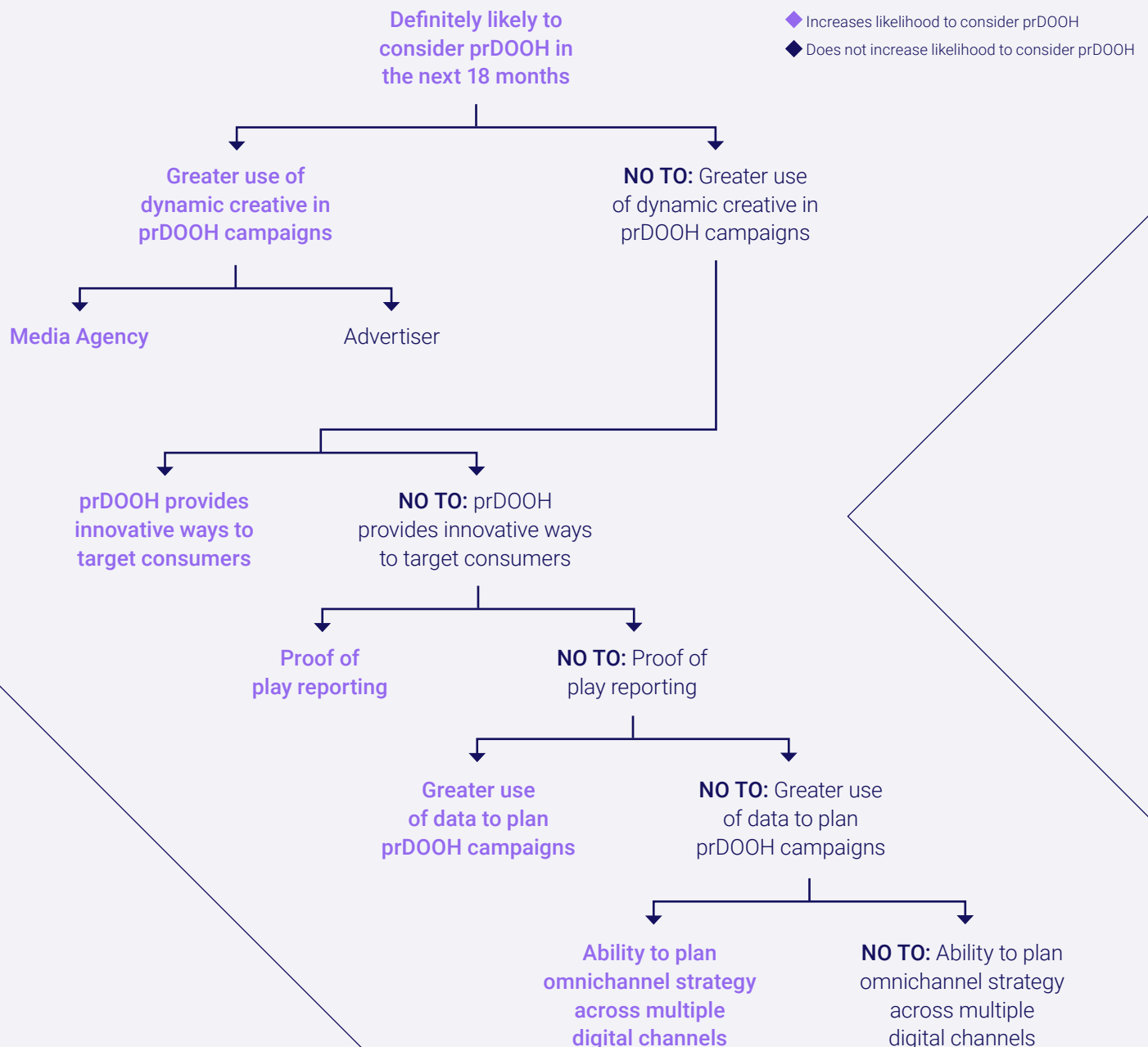
These findings suggest that emphasising the innovative and data-driven aspects of prDOOH, as well as the benefits of dynamic creative can enhance its appeal and drive higher consideration rates in the future.

³⁹For more information and definition of proof-of-play reporting please see the appendix.

DECISION TREE FOR prDOOH CONSIDERATIONS

The decision tree visually represents the key predictors of increased consideration. To read the decision tree, start at the top with those likely to consider prDOOH in the future.

Follow the branches based on the importance of different factors, such as the use of dynamic creative opportunities. If DCO is not perceived as important, the next factor is innovative targeting methods. If this also does not resonate, then proof of play reporting becomes significant. For more information on the approach and methodology please see the appendix.



CONCLUSION

The state of prDOOH advertising reflects a dynamic and rapidly evolving landscape. As marketers increasingly recognise prDOOH's flexibility, dynamic creative opportunities, and sustainability benefits, its growth is projected to continue. Survey results indicate that marketers anticipate a 28% average increase in prDOOH spending over the next 18 months, with significant budgets sourced from existing traditional and digital budgets, as well as entirely new budget allocations.

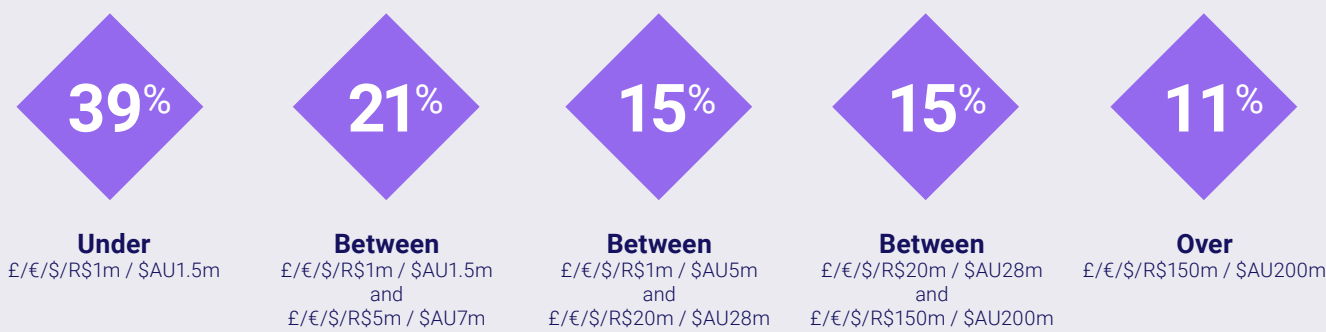
The flexibility of programmatic buying has enabled marketers to seamlessly integrate prDOOH into their campaigns at various stages, both during media purchasing and activation, and proactively as part of broader multi-channel strategies. This shift towards integrated digital campaigns has led to a change in buying responsibilities, with digital and programmatic teams taking a more prominent role. However, OOH teams remain actively involved, underscoring the importance of collaboration to leverage diverse expertise and maximise campaign effectiveness.

In order to unlock its full potential, programmatic DOOH must address several challenges. Standardisation in KPIs and measurement remains a critical need, as does continued investment in education on the unique advantages of prDOOH to effectively onboard and empower the growing number of newcomers to the channel. Technological advancements, particularly in DCO, offer significant opportunities for innovation. To capitalise on this, the industry must work towards greater awareness through training and education initiatives.

For more insights and to explore how the different markets compare within the global prDOOH landscape, access the VIOOH State of the Nation 2024 market highlights [here](#).

SAMPLE PROFILE

SIZE OF ADVERTISING BUDGET



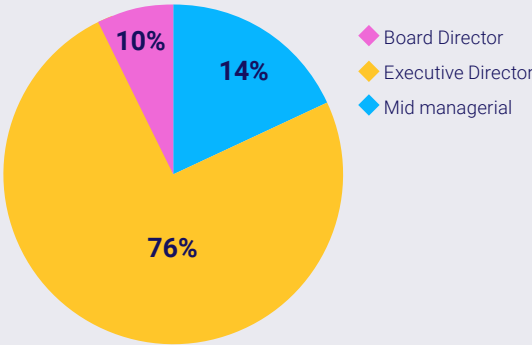
COUNTRY



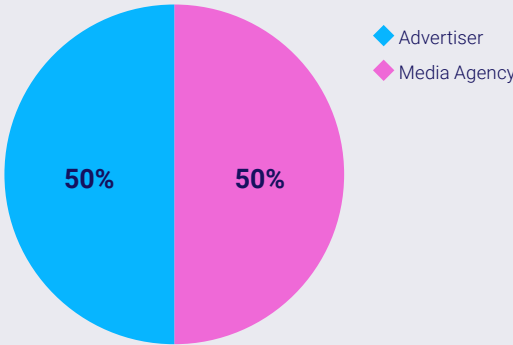
SECTOR

Sector Net	Percentage
Retail, luxury, clothing, FMCG/CPG	32%
Food, Drink, Hospitality	17%
Tech, telco	11%
Finance, advertising, consulting	10%
Academic, gov, non-profit, healthcare	8%
Automotive, transport	8%
Entertainment, gambling	8%
Property, utilities	6%

MANAGERIAL RESPONSIBILITY



ORGANISATION TYPE



Decision Tree Analysis Methodology

Decision tree analysis (CHAID, Chi-squared Automatic Interaction Detector algorithm) is a functional technique that attempts to model, and describe, the relationship between a dependent variable and several independent variables (predictors). It involves a systematic approach to segmenting the data based on the likelihood to consider prDOOH advertising. The process begins with the dependent variable, i.e. likelihood to consider prDOOH advertising in the future. The algorithm then iteratively selects the most significant predictors among the independent variables and splits the data into nodes (levels). The algorithm continues to split nodes until no more significant predictors are found. This approach allows for the identification of key factors and their interactions that influence the dependent variable, providing a clear and hierarchical structure of decision rules.

Read more:

https://en.wikipedia.org/wiki/Chi-square_automatic_interaction_detection

DEFINITIONS:

Dynamic Creative Optimisation (DCO)

Dynamic creative optimisation (DCO) is a display ad technology that creates personalised ads based on data about the viewer at the moment of ad serving. DCO allows advertisers to create a pool of pre-made ad components, like images, headlines and calls to action (CTAs). Then, using real-time data and machine learning algorithms, the most relevant elements are assembled on-the-fly for each individual ad impression. For example, a viewer in a business area might see a prDOOH ad showcasing a professional work bag, while someone near a park might see the same ad featuring a backpack. DCO is maximising the impact of prDOOH campaigns by ensuring each ad is hyper-personalised and speaks directly to the interests and needs of the audience in that specific location and moment.

Proof-of-play reporting

Proof-of-play reporting is a verification method used as evidence that advertising campaigns are running as planned. It automatically captures and delivers detailed information about each ad impression in real time. This data includes the date and time of display, location, creative played, duration, frequency, and audience insights like demographics, mood, and attention times. The collected data is then aggregated into a user-friendly dashboard, offering advertisers a comprehensive overview of campaign performance and network activity.

WITH THANKS TO

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