

SEASON 3, EPISODE 1

Programmatic DOOH: Tale of Evolution

In the first episode of season three of the Life in Programmatic DOOH, JCDecaux UK's Head of Programmatic Dom Kozak is once again joined by Carrie Condino, B2B Research Director at MTM to discuss the findings of our latest research into how marketers in the UK are using programmatic DOOH (pDOOH). Titled A Tale of Evolution, the research charts the changes in the ways in which brands and agencies in the UK have activated pDOOH and the requirements for further growth.



Carrie Condino,
B2B Research Director,
MTM

Listen to the full episode here or read on for a summary of Carrie and Dom's conversation.

How has pDOOH evolved over the past 12 months?

"This is the second year in a row that MTM has partnered with JCDecaux UK to produce independent, quantitative insights into the world of pDOOH and we've seen real signs of increased maturity in the market compared to last year."

"What we've been hearing anecdotally for the past few years, and what we saw in the research last year was that marketers wanted better measurement for pDOOH. This year, better measurement is no longer top of the list of things marketers are looking for. Instead, they want better targeting and better audience

insights. This is indicative of the fact that the past few years have been about marketers understanding how pDOOH works and experimentation."

"Now we're seeing more strategic implementation, true omnichannel planning, and more sophisticated campaigns. We're seeing marketers feel more comfortable and confident with the channel and they're moving on to an era of leveraging insights and continually refining campaigns."

What is driving change in the media planning and buying process?

"We've seen an increase in omnichannel buying from pDOOH buyers. In the research we found 77% are likely to be always directly involved in one or more channels - an increase of 16 percentage points since last year, which is quite a big jump."

"A few factors are driving this change, there's an increase in data that gives marketers a holistic view of connected behaviour across behaviour across channels which is resulting in more marketers using data-driven insights from one channel to another. Another thing that's driving more

omnichannel planning is innovation in technology, especially campaign management platforms that allow marketers to have more seamless coordination over campaign results across multiple different channels."

"Finally, I think there's increasing pressure to have consistent brand narratives and brand journeys across multiple channels, so if pDOOH is planned with other channels marketers can achieve this by introducing frequency capping, sequential messaging, and retargeting."

How is pDOOH being used by brands and agencies?

"One of the questions we asked in the research was why marketers use pDOOH. We saw differences in how brands and agencies answered this question - brands more often said things like for the ability to target specific audiences, or the ability to reach wide audiences, and prime online audiences. On the flip side, agency respondents were more likely to choose the possibility to measure performance and the flexible buying options."

"My hypothesis for why we're seeing that this year is partly to do with third-party cookie deprecation. I think brands and agencies are feeling the pressure in different ways this year and it came out in the research. Without being able to target consumers online as effectively, brands need the ability to reach a wide audience, and they need to prime online audiences with other channels."

"Then on the flip side, the pressure felt by agencies in the cookieless world is more about still needing demonstrate effectiveness to their clients so they're more focussed on measurement and different buying methods depending on what's most relevant to each client and each campaign."

What are the key requirements for growth in pDOOH?

"The trends we're seeing are indicative of a more mature channel compared to 12 months ago. Measurement and behavioural data have become much less of a challenge and have been replaced by a need for more effective targeting and better audience insights. This means that there is a desire to move beyond those basic impressions and engage with more advanced metrics. There's a desire to understand how pDOOH can actually impact audience behaviour and drive conversions."

"I think we're going to see a lot more contextual targeting across the industry and pDOOH is the perfect place to do this as well as in CTV because there are contextual targeting capabilities there too. I think just like any other mature channel, we're going to see marketers continue to request more transparency in the supply chain, especially as data partnerships and integrations grow in number to facilitate that better targeting that marketers want."