

JCDecaux

PROGRAMMATIC
DIGITAL OUT-OF-HOME

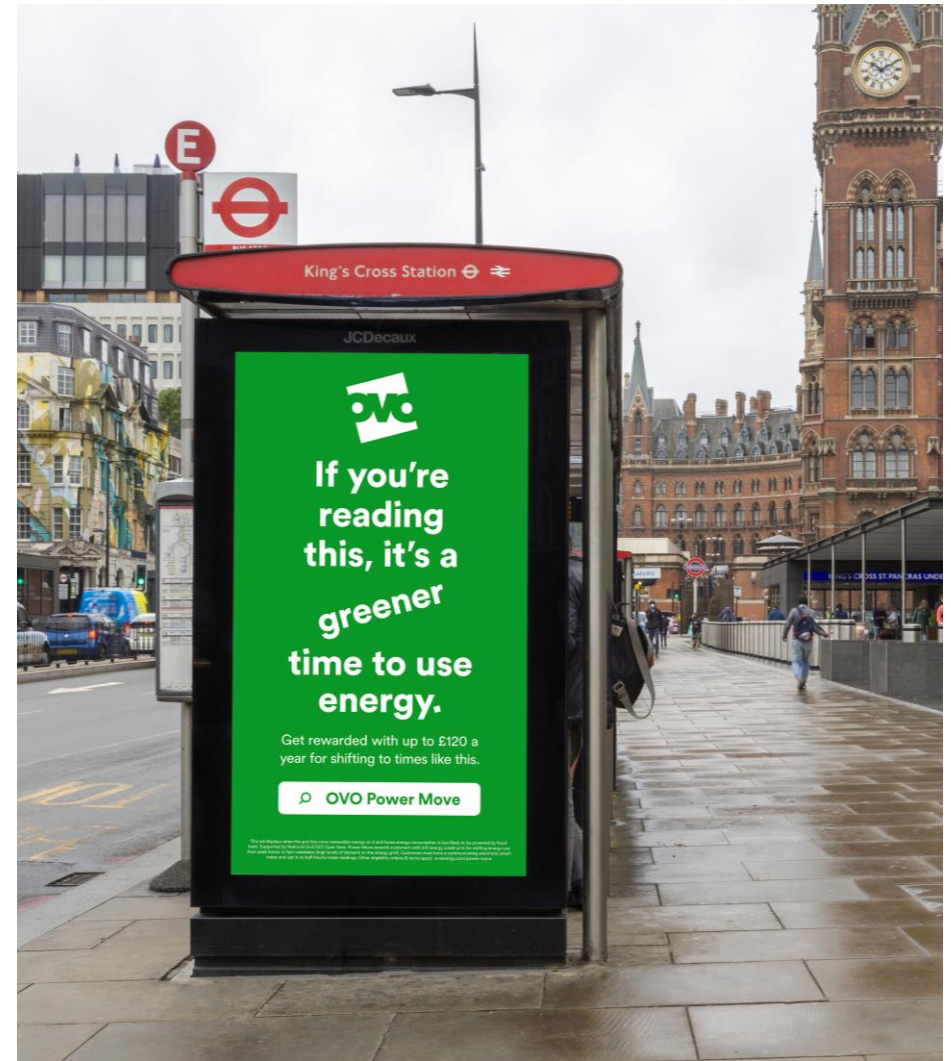
A TALE OF EVOLUTION

mtm

PROGRAMMATIC DOOH – A TALE OF EVOLUTION

- During 2023 programmatic digital out-of-home (pDOOH) ad spend doubled¹ and it is predicted to account for 16% of all OOH ad spend in 2027 (up from ~5% in 2023)².
- This rise in investment has naturally resulted in an increase in experience in pDOOH, and with experience comes knowledge and insight.
- For the second year in a row, we have partnered with leading research and strategy consultant [MTM](#) to better understand how marketers are using pDOOH, the benefits they are seeing, and requirements for further growth.
- The research reveals that many of the challenges associated with measurement and data integration faced by marketers in 2023 have been overcome through innovation and technology. These positive strides forward have created an opportunity for marketers to advance their pDOOH audience targeting strategies resulting in the channel delivering even more value to brands.

1. JCDecaux internal data 2. IAB DOOH Compass

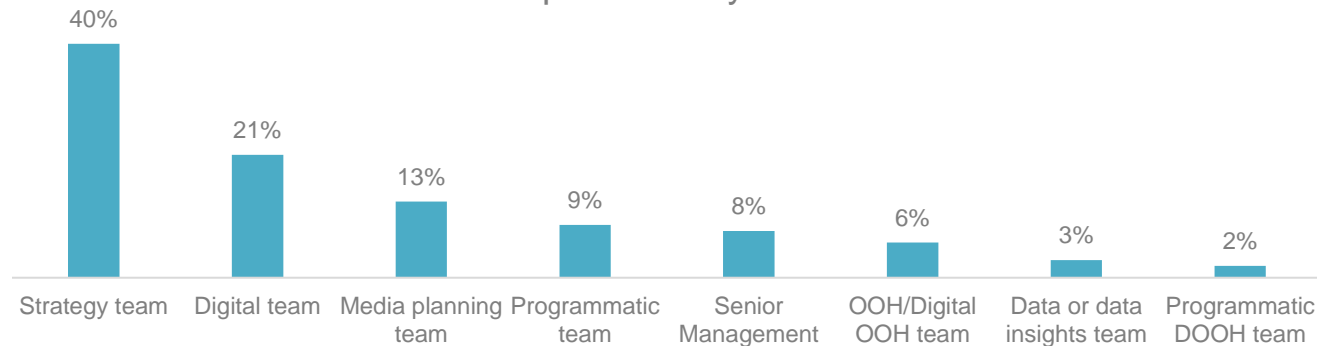


METHODOLOGY

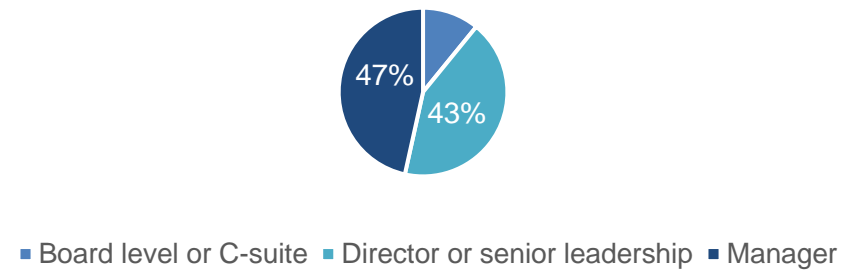
In partnership with MTM, JCDecaux UK surveyed 200 brand (50%) and agency (50%) marketers that all had experience in planning and/or buying programmatic DOOH (pDOOH) and at least one other channel within the last 12 months in the UK.

Fieldwork was carried out in November and December 2023. All respondents were decision makers in channel selection for their organisation or clients.

Respondents by team



Respondents by seniority



KEY FINDINGS

TRENDS THAT ARE SHAPING PROGRAMMATIC DOOH

1. **Integrated planning/buying is more common compared to last year** - 77% of pDOOH buyers are likely to be always directly involved in one or more other channels (+16pts YoY).
2. **Operational efficiency (28%), viewability (27%) and ability to reach incremental audiences (26%)** are now the top motivations for marketers to use pDOOH in their media mix.
3. **More than one-third (35%) have an always on strategy** for pDOOH. The most common use cases are to **boost DOOH reach in specific locations (47%) and times (41%), and to support other digital channels (38%)**.
4. **Brand awareness (67%), online sales (60%), and performance of other digital channels (58%)** are the most commonly used KPIs for pDOOH campaigns.
5. **The primary planning and buying challenge with pDOOH is price (41%)**. Audience targeting (35%), selecting the right media partners (33%), first-party data integration (33%), and the ability to measure performance alongside other channels (31%) are core secondary concerns.
6. **Marketers believe that more effective targeting (43%) and better audience insights (33%)** are the key requirements for growth (+7 and +10 pts YoY respectively).

KEY FINDINGS

DIFFERENCES BETWEEN BRANDS AND AGENCIES

Brands

More likely to:

- Use an always on strategy
- Focus on audience targeting capabilities
- Use performance uplift of other channels as a KPI for pDOOH

Agencies

More likely to:

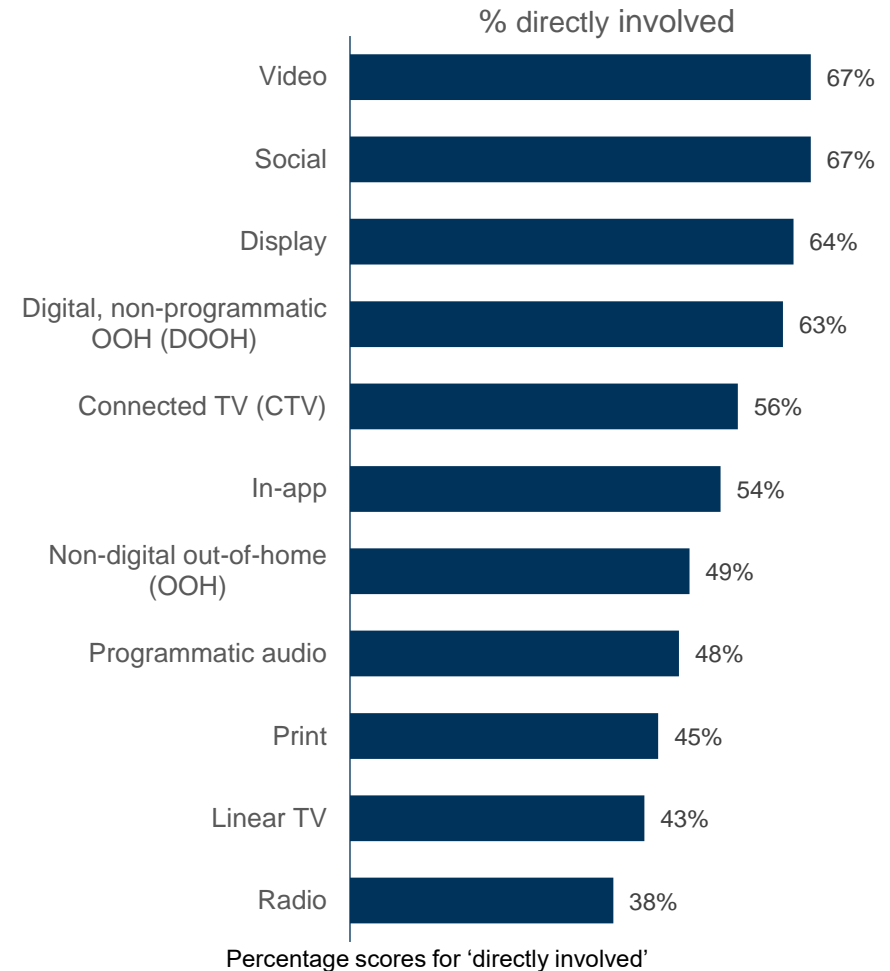
- Focus on measurement
- More frequent use of real-time optimisation
- Measure purchase consideration



INTEGRATED PLANNING AND BUYING

77% of pDOOH buyers are likely to be always directly involved in one or more other channels (+16pts YoY), the most popular being video, social, display, and DOOH.

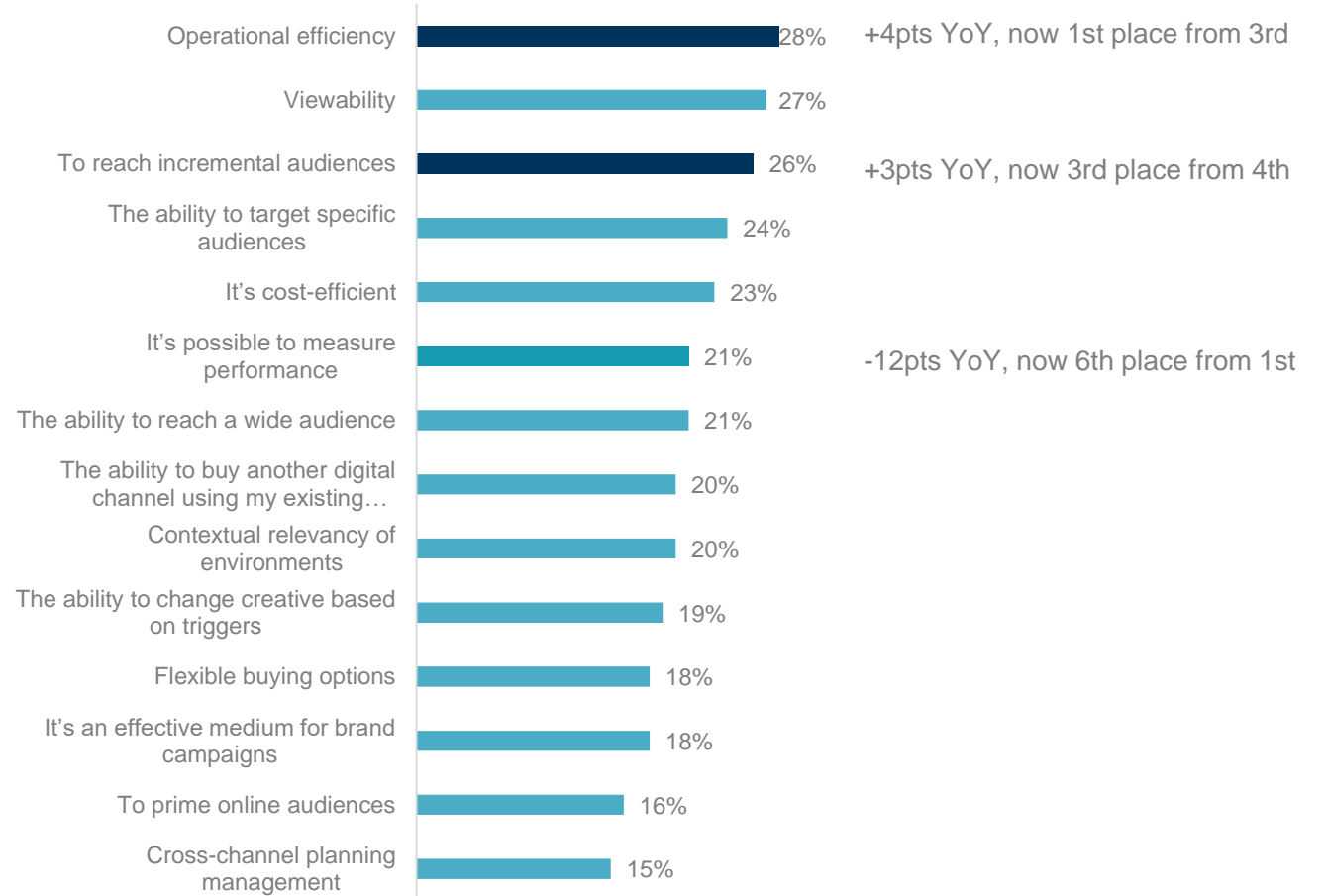
- Marketers were more likely to be always or sometimes directly involved in consideration of **video** (+17pts YoY) and **display** (-2pts YoY) in conjunction with pDOOH.
- Marketers were also more involved in decision-making for **DOOH** (+1pts YoY) than last year.



B6. How involved were you in the consideration and decision-making whether to plan and buy the following media channels in conjunction with your pDOOH campaigns? Base: Total: 200, Brand: 100, Agency: 100
 *Social is a new answer option for 2023, thus no YoY comparison has been made.

WHY DO MARKETERS CHOOSE pDOOH?

- Over the past 12 months, pDOOH has proven its role in the marketing mix meaning that measurement, while still important, is being superseded by delivery focused objectives when it comes to reasons marketers choose pDOOH.
- Operational efficiency (28%), viewability (27%), and ability to reach incremental audiences (26%)** are now the top motivations for marketers (brand and agency) to use pDOOH in their media mix.

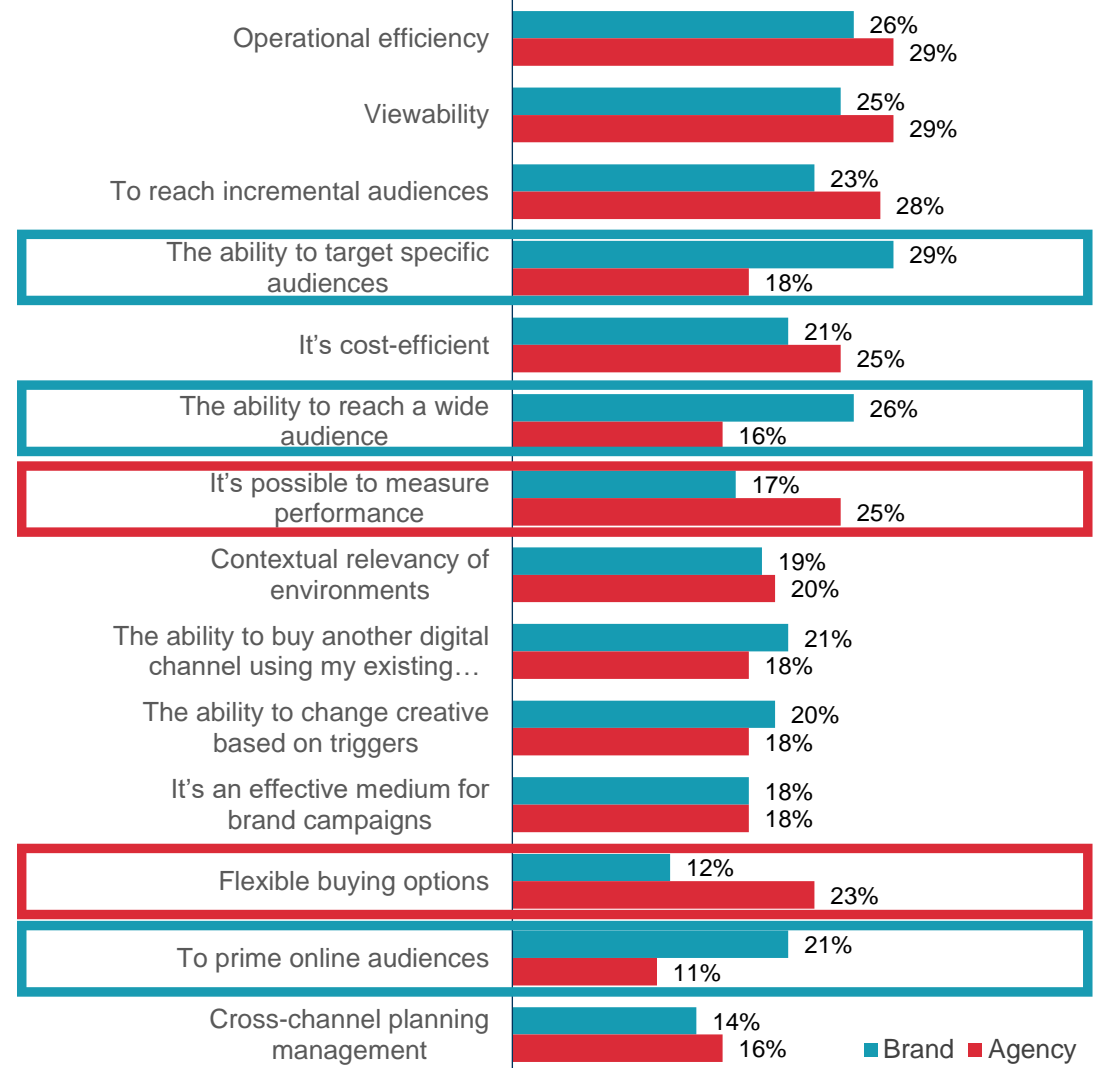


B1. What are the top three reasons you include pDOOH in your media mix? Base: Total: 200, Brand: 100, Agency: 100

WHY DO MARKETERS CHOOSE pDOOH?

BRANDS vs. AGENCIES

- Brands and agencies have different motivations for buying pDOOH.
- A greater number of brand respondents citing audience targeting (both specific and wide) and priming online audiences compared to agency respondents.
- On the other hand, agency respondents are more motivated by flexible buying options and the ability to measure performance.

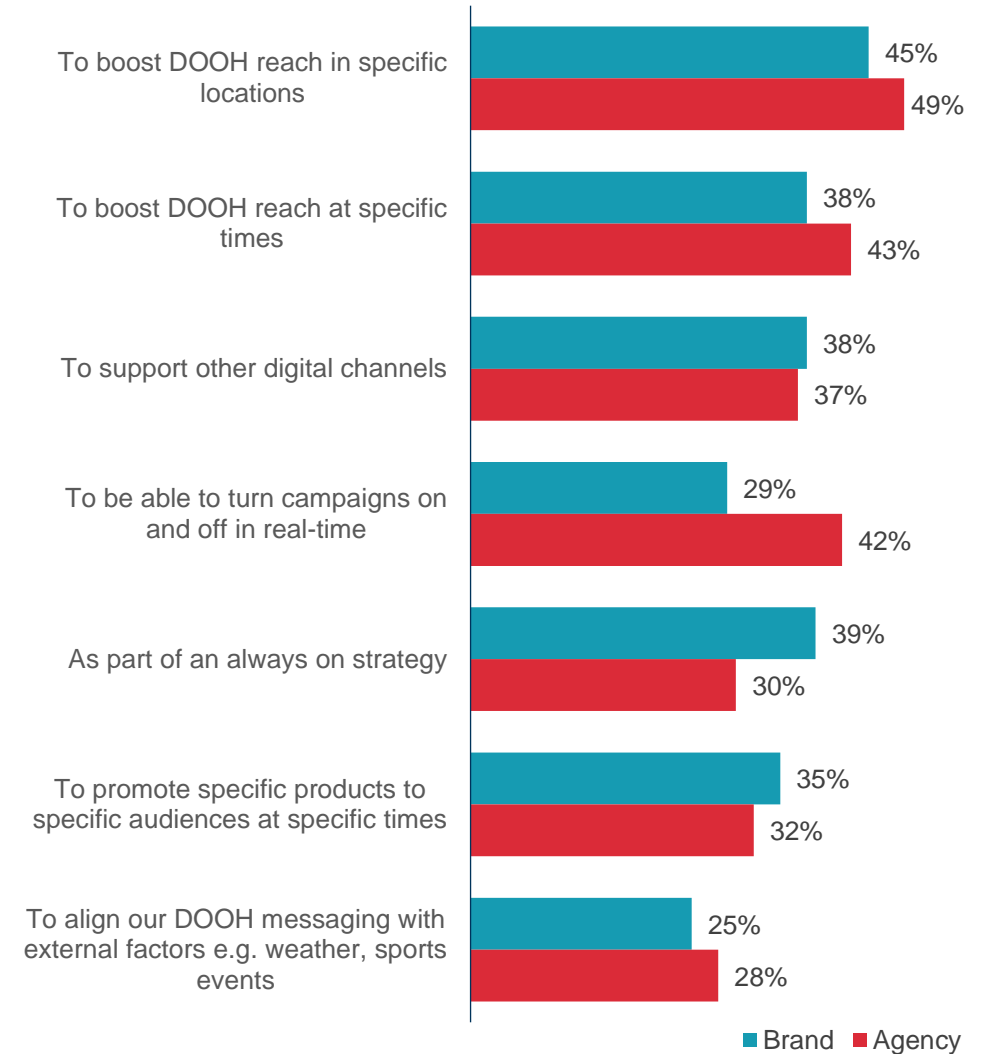


B1. What are the top three reasons you include pDOOH in your media mix? Base: Total: 200, Brand: 100, Agency: 100

HOW ARE MARKETERS USING pDOOH?

Marketers use pDOOH most commonly to **boost DOOH reach in specific locations (47%)** and **times (41%)**, and to **support other digital channels (38%)**

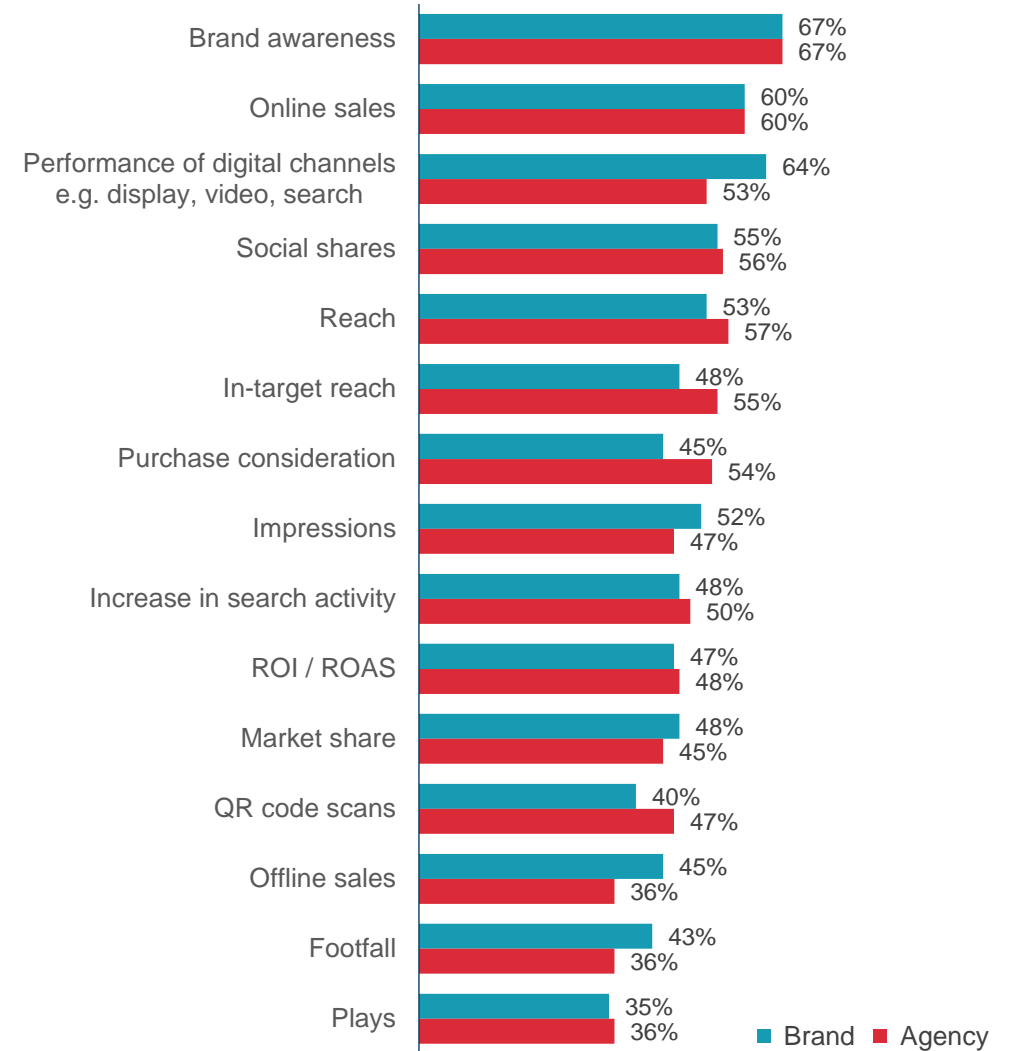
- Brand-side marketers are more likely to use pDOOH as part of an always on strategy vs. agencies (39% vs 30%).
- More agency marketers are using real-time on/off functionality (42%) than advertisers (29%).



HOW ARE MARKETERS MEASURING pDOOH?

Brand awareness (67%), online sales (60%), and performance of other digital channels (58%) are the most commonly used KPIs for pDOOH campaigns.

- Brand-side marketers are more likely to use performance of other digital channels as a KPI vs. agencies (64% vs. 53%).
- More agency marketers are using purchase consideration (54%) than advertisers (45%).

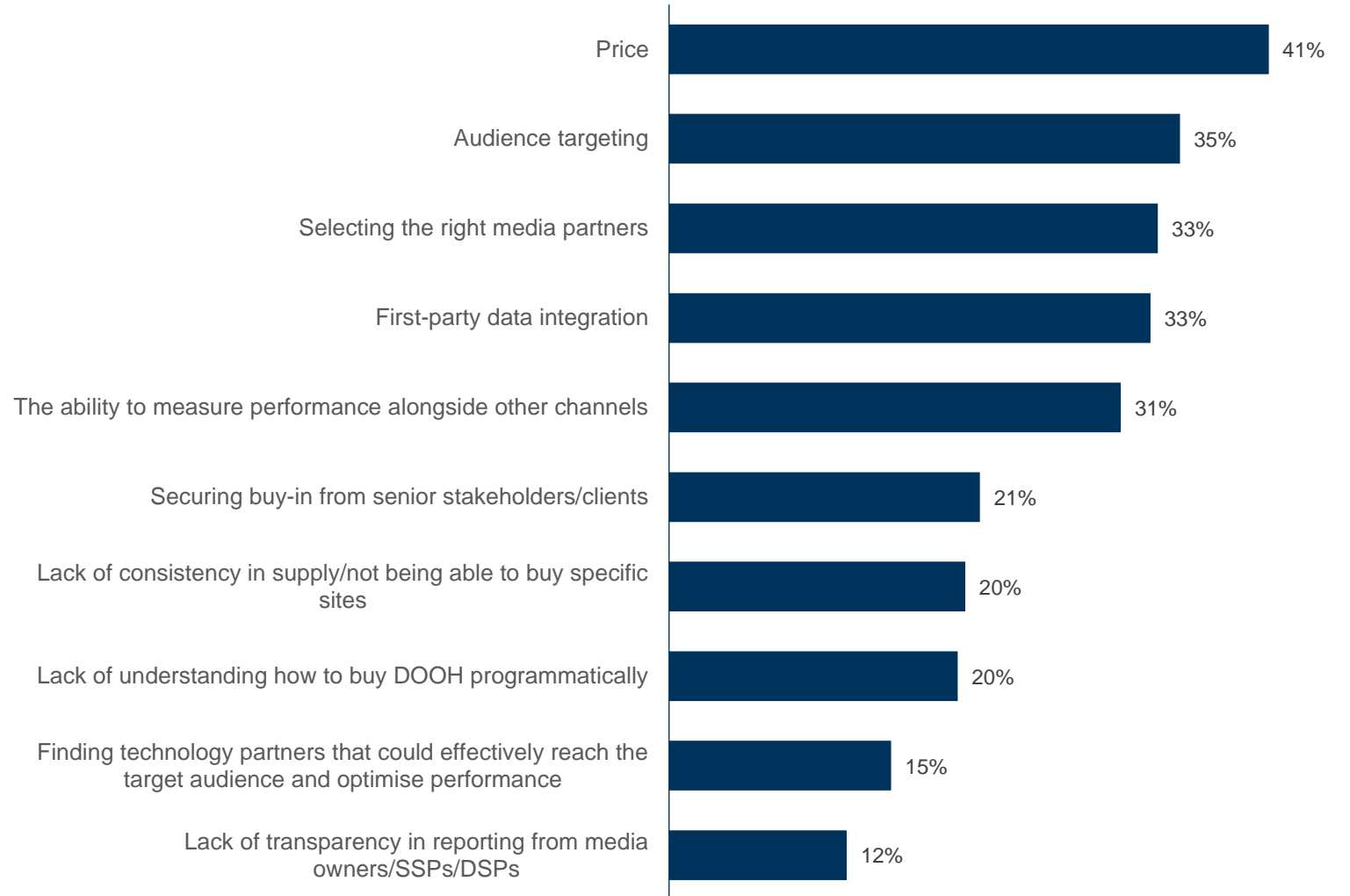


B4. How often do you use the following metrics to measure the success of your pDOOH campaigns? Base: Total: 200, Brand: 100, Agency: 100

OVERCOMING CHALLENGES

The **primary planning and buying challenge with pDOOH is price (41%)**.

Audience targeting (35%), selecting the right media partners (33%) first party data integration (33%), and the ability to measure performance alongside other channels (31%) are core secondary concerns.



B7. What were the top three challenges you have faced when planning and buying pDOOH, if any at all? Base: Total: 200, Brand: 100, Agency: 100

HOW MARKETERS ARE OVERCOMING THE PRICE CHALLENGE

“ Price is always the main issue when we think about new campaign ideas. We decided to take some risk in order to reach wider audiences.

Manager, Agency, Strategy team.

”

“ Selecting well-known partners is one way to overcome the challenge. Experienced technology partners can mitigate challenges systematically.

Manager, Brand, Strategy team.

”

“ We have to be prepared for push-back. But, if we select cost effective platforms, we can overcome this challenge soon. After the initial experiments, there will be more confidence in pDOOH.

Manager, Brand, Digital team.

”

“ Conducting proper analysis and comparison of locations is essential before finalising a price for pDOOH.

Manager, Agency, Digital team.

”

“ Entering more open auctions is one of the ideas that would help control costs.

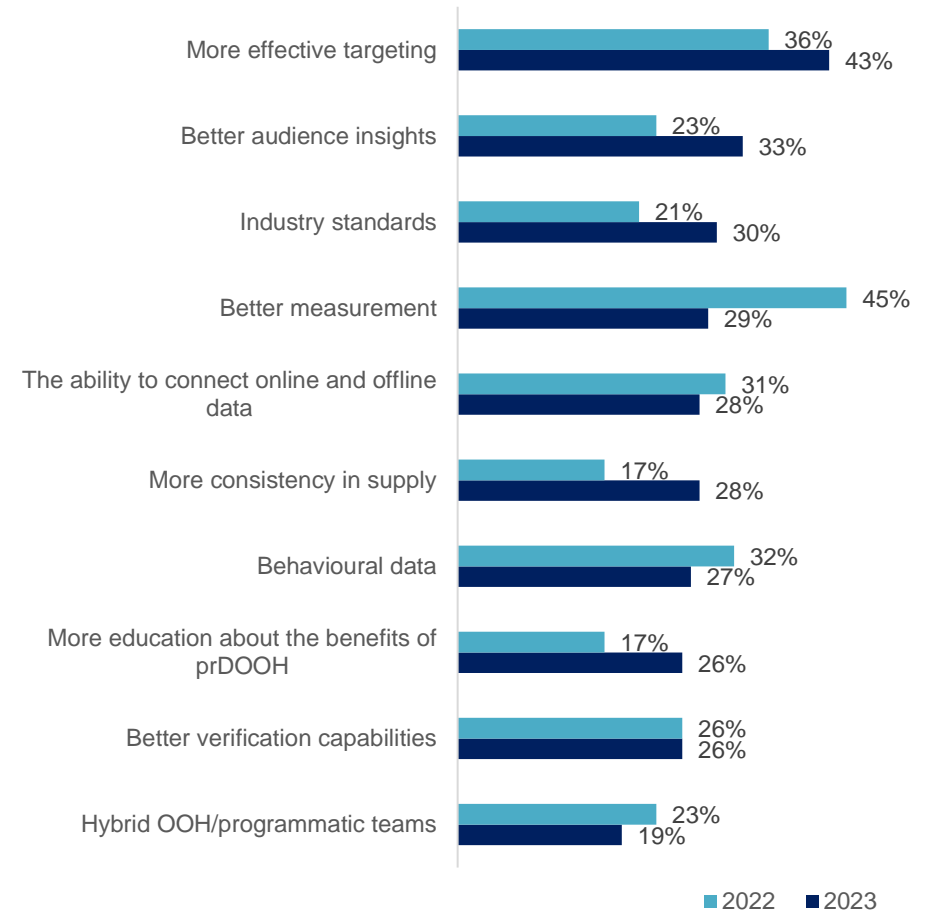
Director/Senior Leadership, Agency, Strategy team

”

REQUIREMENTS FOR GROWTH

- Over the past 12 months, challenges associated with measurement and data have been eroded.
- Today, marketers believe that **more effective targeting (43%, +7pts YoY)** and **better audience insights (33%, +10pts YoY)** are the key requirements for growth.

Requirements for growth 2022 vs. 2023



B9. What are the top three things you think are required for pDOOH to grow? Base: 2023: Total: 200, 2022: Total: 200

WHAT MARKETERS SAY ABOUT pDOOH

“

Accessing proven strategies pertaining to OOH campaigns helps save time and significant costs and also helps generate more value.

Manager, Brand, Strategy team

”

“

As part of our site selection strategy, we are using more data and analytics to identify ideal sites for reaching the target audience.

Director/senior leader, Agency, Digital team

”

“

We have been A/B testing to refine our audience targeting and thus have more successful campaigns.

Director/senior leader, Agency, Strategy team

”

WHAT MARKETERS SAY ABOUT pDOOH

“

pDOOH promises to support the other channels. The omnichannel ad experience matters most here.

Manager, Brand, Strategy team

”

“

Investing in a unified analytics platform is helpful to allow us to see performance data from different channels in a single dashboard.

Manager, Agency, Strategy team

”

“

We have diversified our campaign strategy and are focusing on reaching audiences through multiple channels to fit our advertising budgets accordingly.

Manager, Agency, Digital team

”

KEY FINDINGS

TRENDS THAT ARE SHAPING PROGRAMMATIC DOOH

1. PLANNING AND BUYING

pDOOH is most often planned and bought by multi-channel marketers who are directly involved in the planning and buying of other digital and non-digital channels. It is favoured for bringing operational efficiency.

2. STRATEGY AND TACTICS

Marketers use pDOOH to achieve a variety of goals via both always on campaigns and tactical activations. The most popular use cases are to boost the reach of traditional DOOH in specific locations and at specific times and to support other channels such as online, mobile, and CTV.

3. DATA AND TARGETING

Advanced data integrations in pDOOH enable marketers to successfully reach incremental audiences and niche audiences. Meanwhile, many marketers also use pDOOH to reach wide audiences in a cost-effective way.

4. MEASUREMENT

pDOOH is most often planned and bought by multi-channel marketers who are directly involved in the planning and buying of other digital and non-digital channels. It is favoured for bringing operational efficiency.

5. STRATEGY AND TACTICS

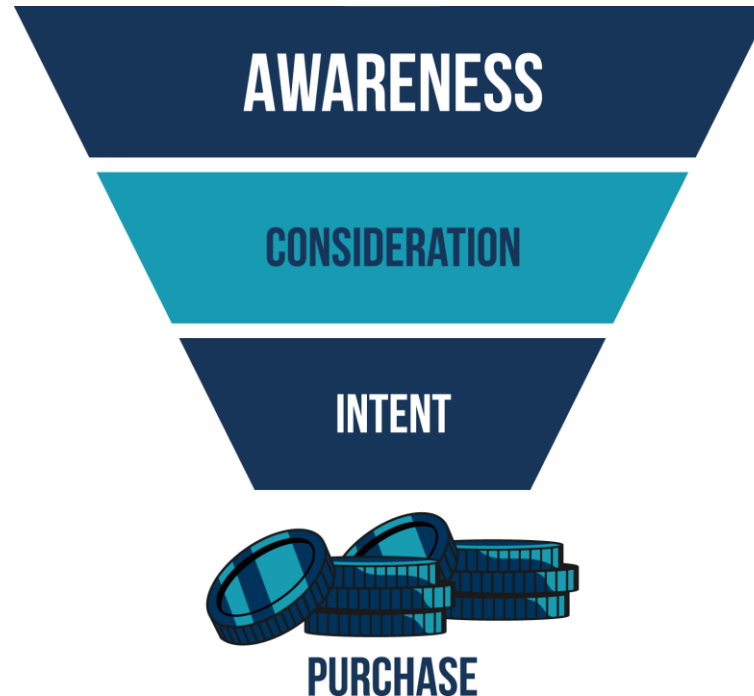
Having solved many of the challenges associated with measurement and data integration, marketers are now seeking out new audience targeting capabilities and deeper audience insights to grow the channel further.

Programmatic DOOH has shaken off its nascent label and is now an integral part of an effective omnichannel marketing plan. While challenges exist, the opportunities to effectively and efficiently reach audiences and deliver brand and sales outcomes enables marketers to seamlessly integrate pDOOH into any digital or OOH strategy to great effect. To find out more about how JCDecaux helps brands and agencies leverage the power of programmatic, please click here or contact us via uk.programmatic@jcdecaux.com.

HOW JCDECAUX CAN HELP YOU ACHIEVE YOUR MARKETING GOALS WITH pDOOH

ACTIVATION SOLUTIONS

- Audience reach
- Impressions
- Brand lift studies
- Real-time performance monitoring
- Multi-channel attribution



MEASUREMENT SOLUTIONS

- Integrate with your chosen DSP
- Audience targeting
- Amplify performance of other channels
- Guaranteed and non-guaranteed
- Creative testing solutions
- Real-time campaign optimisation

ADDITIONAL RESOURCES AND INSPIRATION

WHITE PAPERS, HOW-TO GUIDES, THOUGHT LEADERSHIP, CASE STUDIES, PODCASTS

PROGRAMMATIC INTELLIGENCE HUB

The latest programmatic digital Out-of-Home news, insights, research, case studies, and training.



To find out more about how JCDecaux helps brands and agencies leverage the power of programmatic, please contact us via uk.programmatic@jcdecaux.com.



JCDecaux

PROGRAMMATIC
DIGITAL OUT-OF-HOME

A TALE OF EVOLUTION

mtm