

JCDecaux

PROGRAMMATIC  
DIGITAL OUT-OF-HOME

THE TIME IS NOW

mtm

# PROGRAMMATIC DOOH – THE TIME IS NOW

Programmatic digital out-of-home (prDOOH) ad spend is on the rise in the UK, with data from JCDecaux UK showing that investment more than doubled last year compared to 2021. With so many advertising channels available to digital marketers, the challenge faced by many is understanding where prDOOH fits in an omnichannel strategy, and how to prove it delivers value to the bottom line.

In order to provide brands and media agencies with insights into how best to leverage prDOOH, JCDecaux partnered with leading research and strategy consultant [MTM](#) focusing on how prDOOH is being used today and key areas for development.



Deliveroo, prDOOH at Heathrow airport September, 2022.

**“Programmatic is a tactic, not a budget”**

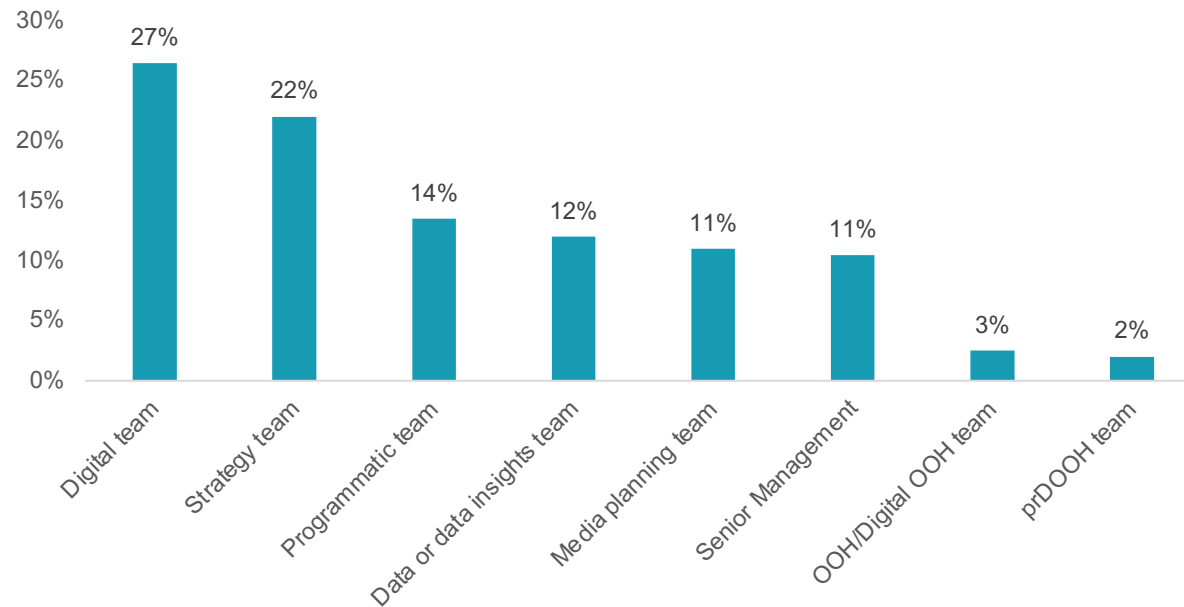
- Dallas Wiles, Co-CEO, JCDecaux UK

# METHODOLOGY

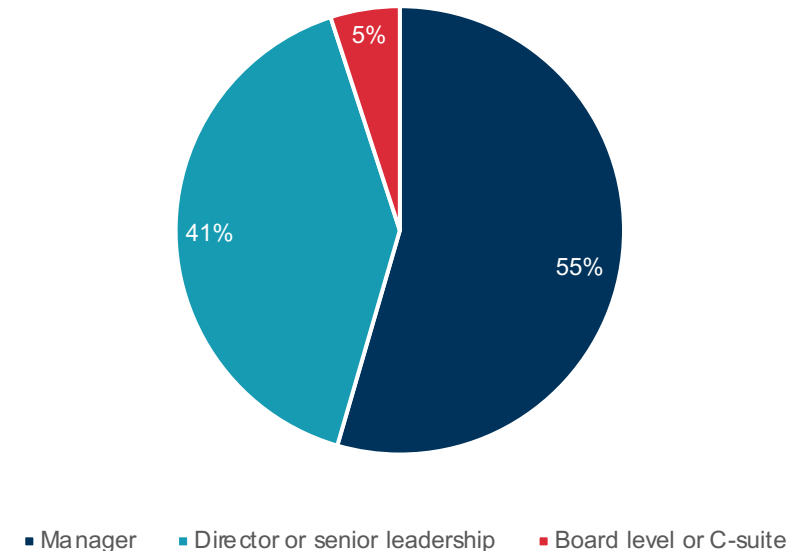
In partnership with MTM, JCDecaux UK surveyed 200 brand (45%) and agency (55%) marketers that all had experience planning and/or buying programmatic DOOH and at least one other channel within the last 12 months in the UK.

Fieldwork was carried out in November 2022. All respondents were decision makers in channel selection for their organisation or clients.

Respondents by team



Respondents by level of seniority



# KEY FINDINGS

## TRENDS THAT ARE SHAPING PROGRAMMATIC DOOH

1. **61%** of prDOOH marketers are always directly involved in the planning and buying of at least one other channel (54% in non-OOH channels)
2. **Brand awareness (70%)**, uplift in digital campaign performance (67%), and impressions (66%) are the top three KPIs used in prDOOH
3. **35%** say that prDOOH delivers across brand and performance metrics to a greater effect than any other channel
4. **73%** of prDOOH marketers say they will use dynamic creative optimisation in prDOOH in the next 12 months, up from 48% using it in the past 12 months
5. **Two-thirds (63%)** always or usually measure online sales driven by prDOOH campaigns
6. **43%** of prDOOH marketers use advertiser first-party data to inform targeting and creative strategy



# SATISFACTION, DELIVERED

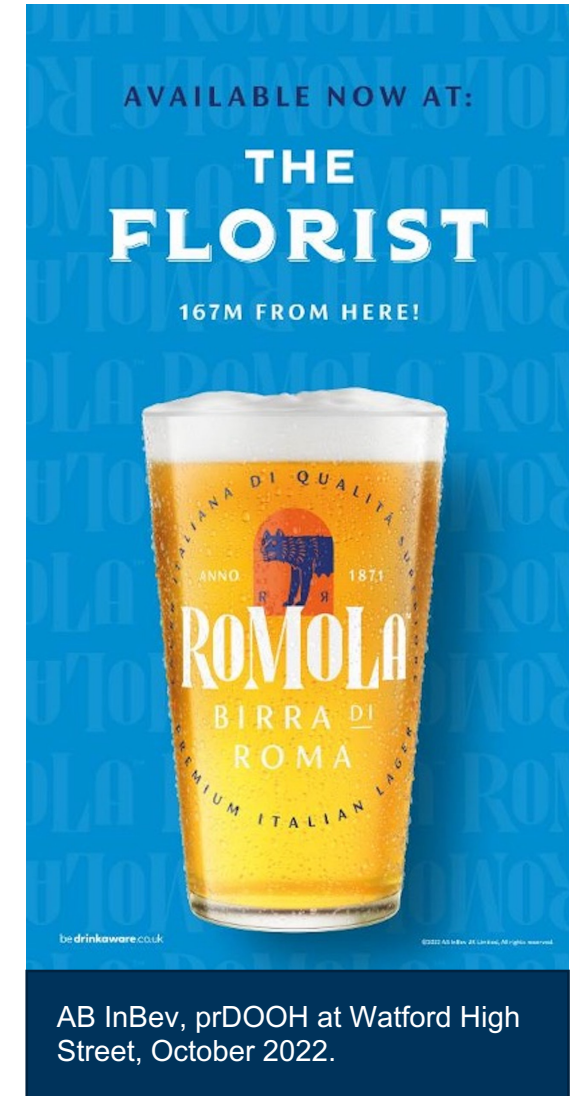
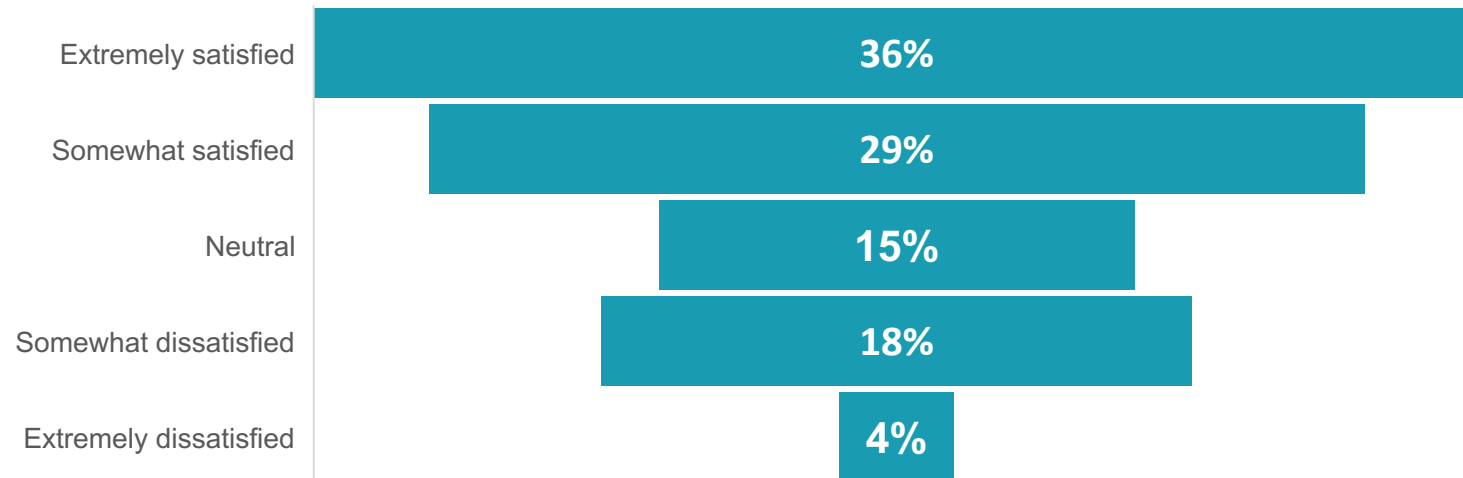
MORE THAN ONE-THIRD OF BUYERS ARE EXTREMELY SATISFIED WITH THE SUCCESS OF prDOOH CAMPAIGNS

**“We just reached spectacular levels of campaign quality with this digital channel.”**

- Digital Director, retail brand

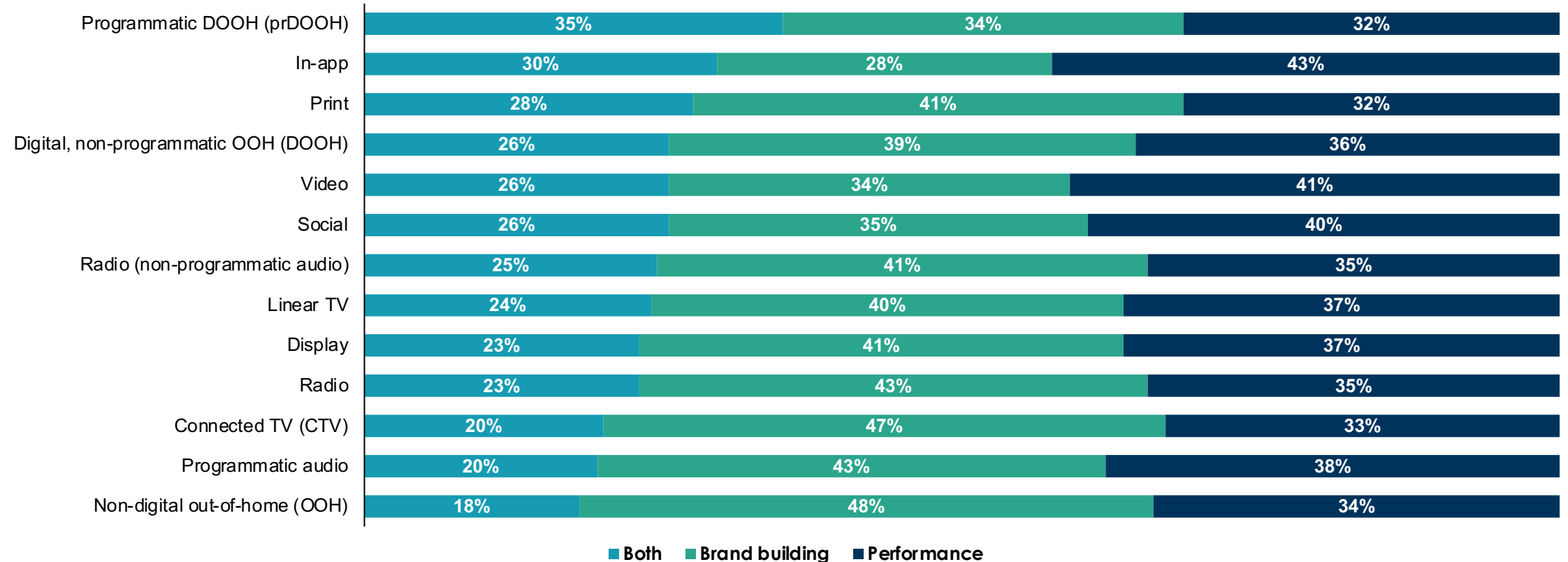
**“prDOOH has created a new dimension in marketing for us.”**

- Programmatic Manager, FMCG brand



# THE FULL FUNNEL EFFECT

PrDOOH IS THE BEST CHANNEL FOR DELIVERING BRAND AND PERFORMANCE KPIs

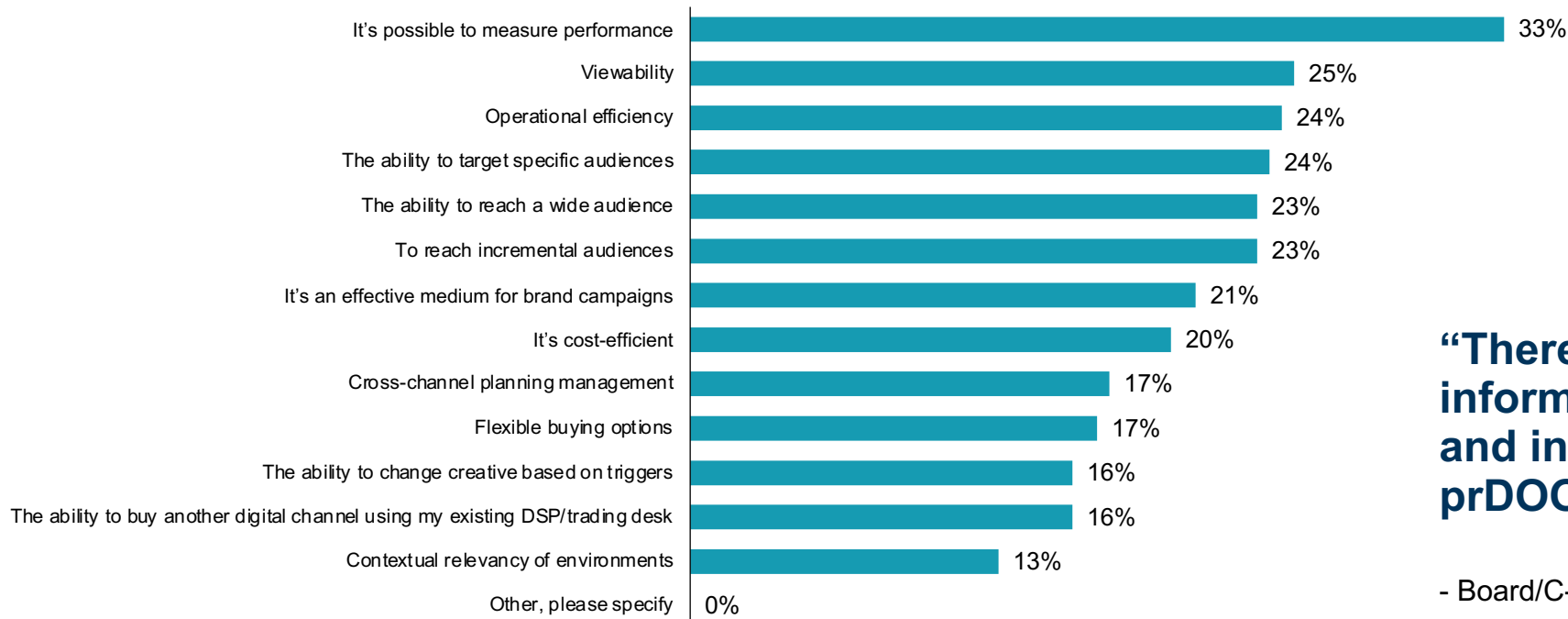


Programmatic technology is transforming the way we think about brand marketing – [read more here.](#)

# MEASUREMENT IS KING

ONE-THIRD OF prDOOH MARKETERS SAY THE ABILITY TO MEASURE PERFORMANCE IS A KEY FACTOR IN INCLUDING IT IN THEIR MEDIA MIX

Other benefits that have been instrumental in driving the growth of prDOOH are **viewability** (25%), **operational efficiency** (24%), **audience targeting capabilities** whether it's to reach a specific audience (24%), a wide audience (23%), or reach incremental audiences (23%).



**“There is so much valuable information we can collect and increase the impact of prDOOH.”**

- Board/C-level, media/entertainment brand

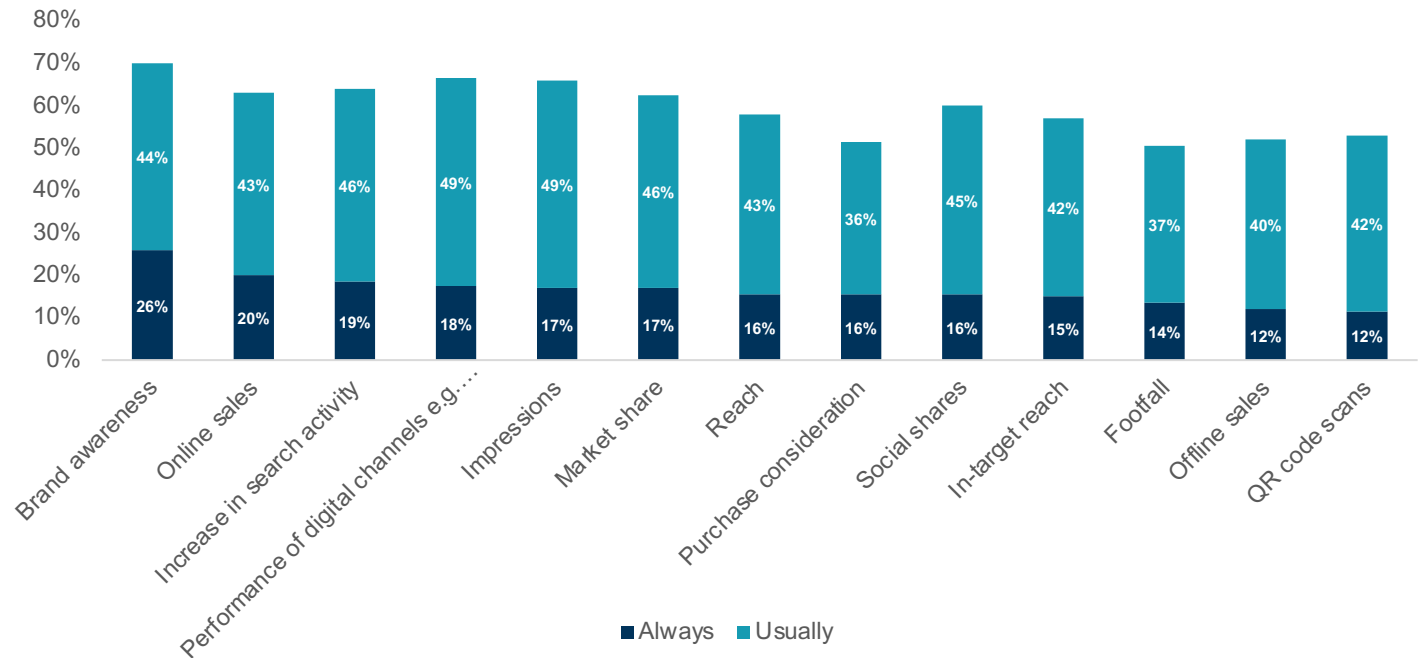
# HOW ARE MARKETERS MEASURING PERFORMANCE?

## BRAND AWARENESS, SALES, AND PERFORMANCE OF OTHER CHANNELS

In line with marketers' view that prDOOH is the top performing channel in terms of delivering both brand and performance uplift, marketers are using an array of KPIs on a regular basis. However, this is also a complicating factor as 30% say that establishing appropriate goals is a challenge.

- The most frequently used KPI is **brand awareness** (70%) followed by **performance of digital channels** (67%), and **impressions** (66%).
- Two-thirds (63%) of marketers always or usually measure **online sales** proving it is possible to overcome the challenge of tying online and offline together.

How are brands measuring performance?



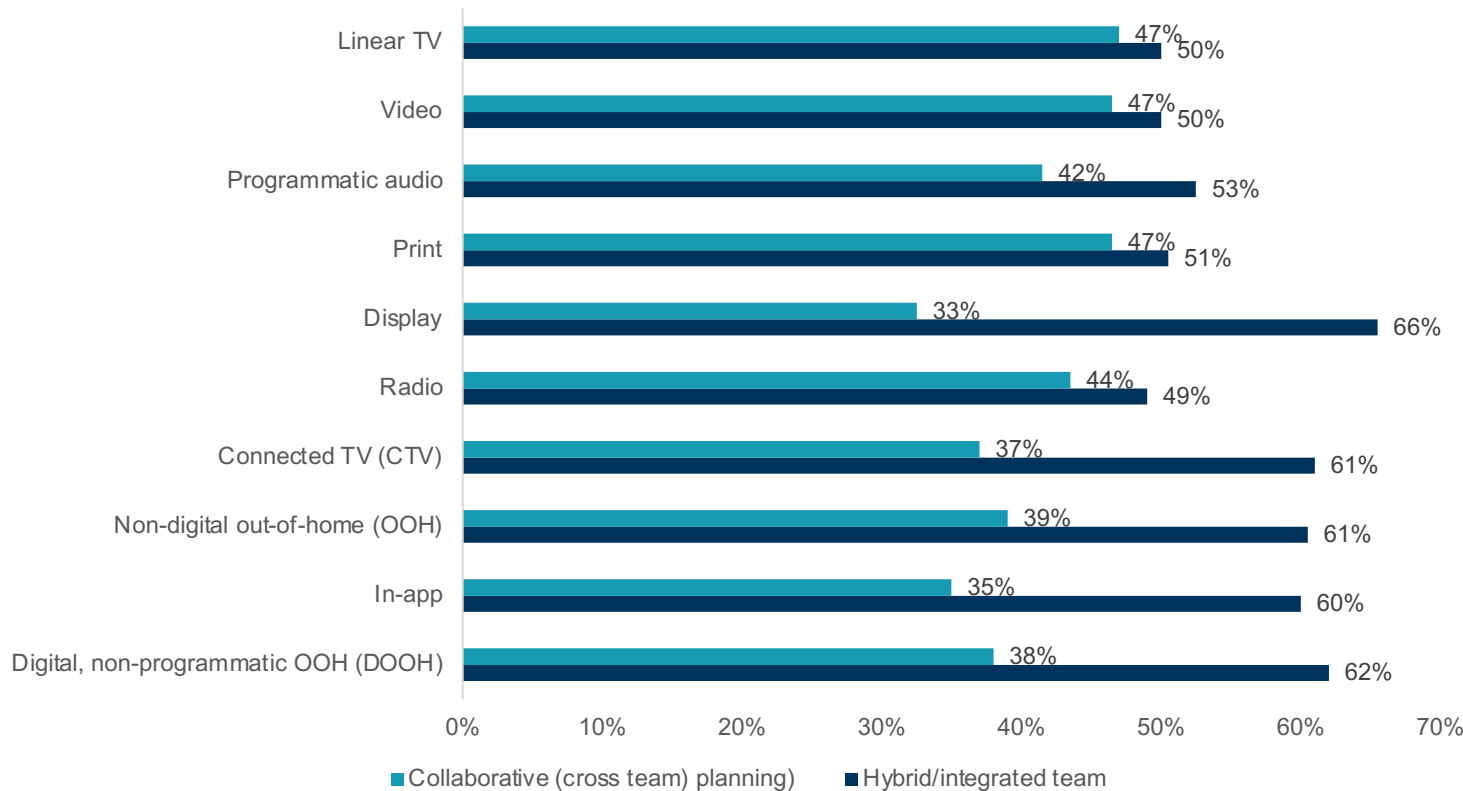
**A test and learn approach is a great way to find out which measurement strategy best suits your campaign objectives – [learn more here.](#)**



# prDOOH IS FULLY INTEGRATED IN THE MEDIA MIX

## HYBRID TEAMS ARE BECOMING MAINSTREAM

Prevalence of hybrid teams and collaborative, cross channel planning



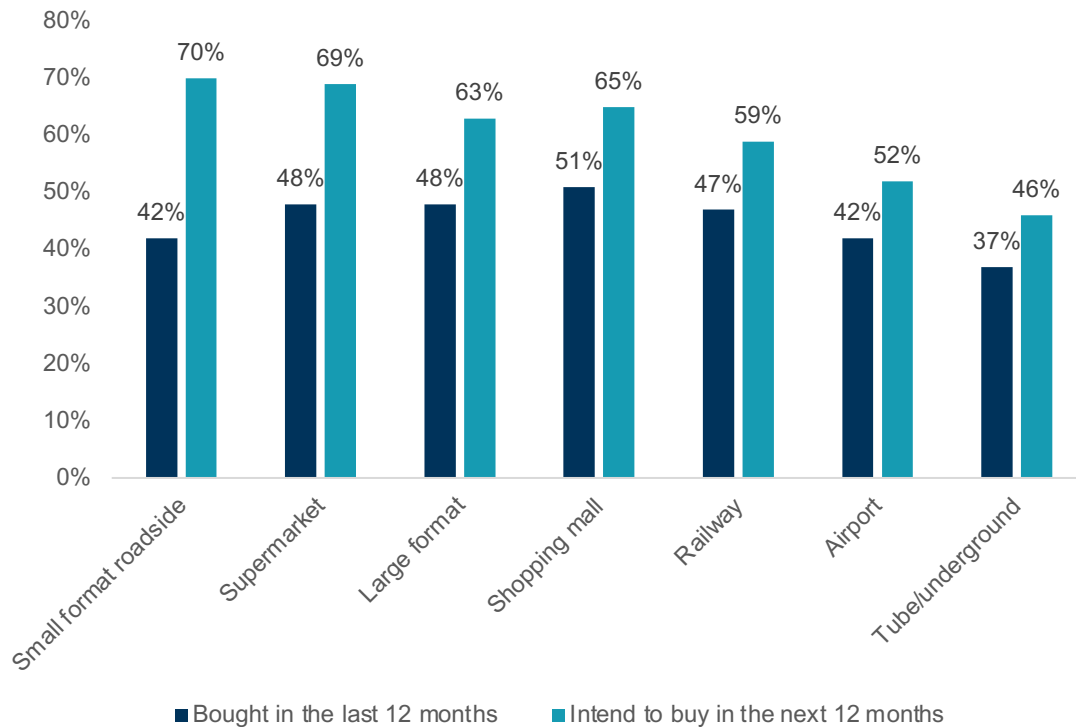
61% of prDOOH marketers are always directly involved in one or more other channels (54% always directly involved in one or more non-OOH channel). Furthermore, two-thirds (66%) always or usually use an omnichannel DSP to run prDOOH campaigns alongside other channels.

**“prDOOH provides hybrid solutions that can be developed with further research and testing in the omnichannel environment.”** Strategy Director, technology brand

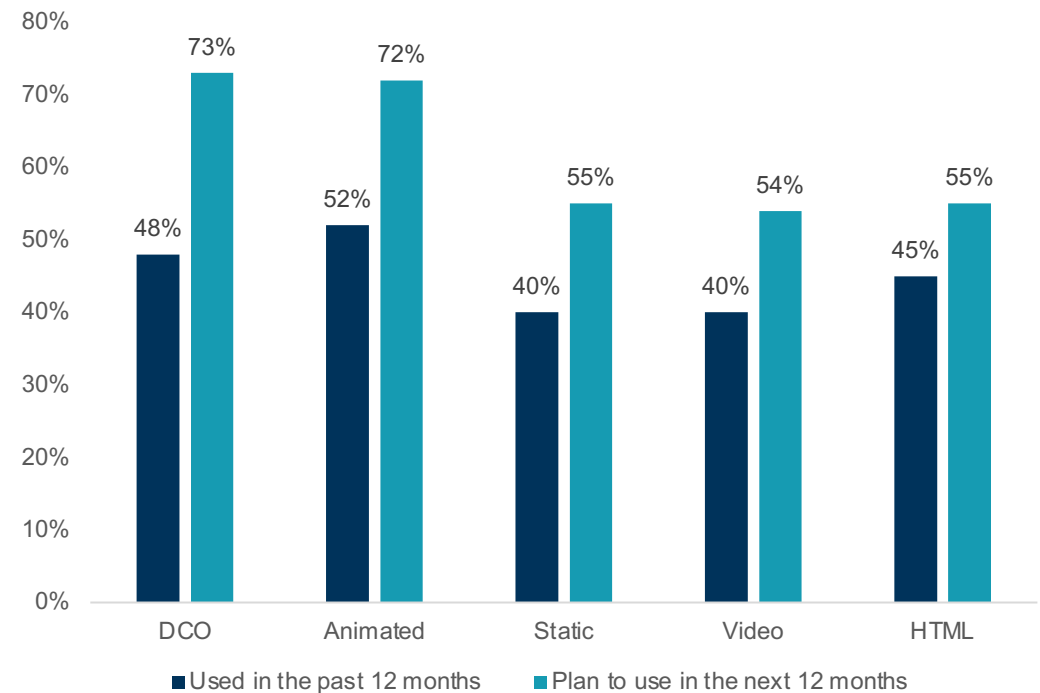
# CREATIVE TRENDS

ROADSIDE AND SUPERMARKETS PROVE MOST POPULAR AS MARKETERS EMBRACE DYNAMIC CREATIVE OPTIMISATION (DCO)

### All formats are set to gain popularity in 2023



### Creative executions are advancing



Check out our team's favourite prDOOH ads from 2022 [here!](#)

# DATA TRENDS

ADVERTISER FIRST-PARTY DATA IS THE MOST POPULAR WAY OF USING DATA TO INFORM TARGETING AND CREATIVE, BUT ADOPTION IS LOW

**“With effective data available, the most recent programmatic [DOOH] campaign was a game changer for us.”**  
- Media Planning Manager, hospitality brand

**“Adding real-time triggers is one of the main reasons why these campaigns hold so much value.”**  
- Digital Manager, automotive brand

## Most commonly used data sources for prDOOH targeting and creative



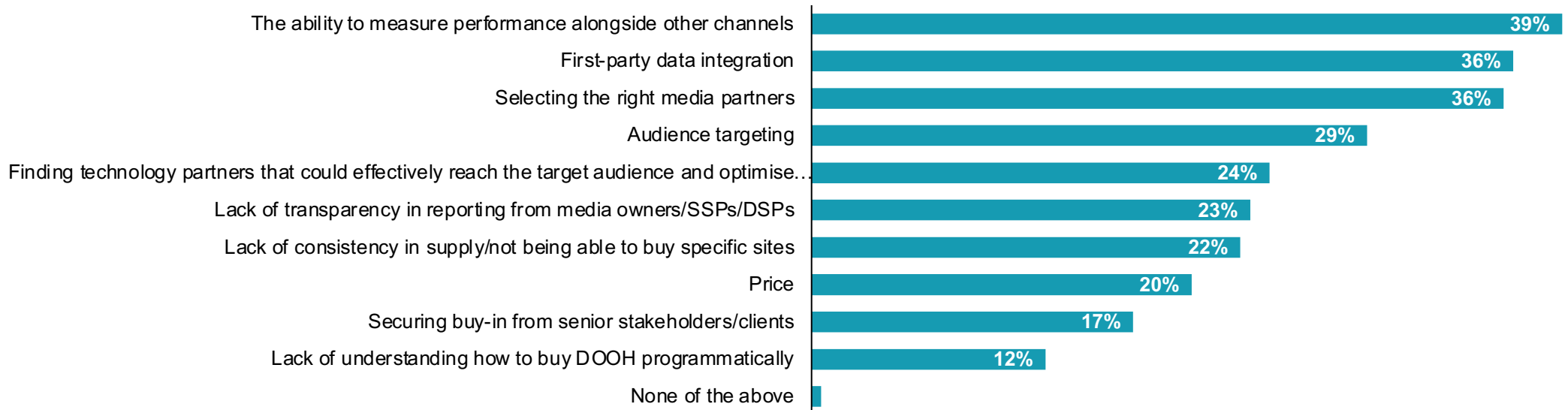
iSport, prDOOH at Wandsworth Tower, October 2022.

# CHALLENGES

## MEASUREMENT, FIRST-PARTY DATA INTEGRATION, AND FINDING THE RIGHT MEDIA PARTNERS ARE BUYERS' TOP CHALLENGES

We asked prDOOH marketers what were the top three challenges they have faced to better understand where improvements are needed.

While challenges with measurement, data-integration, and selecting media partners exist, it's positive to see that price, consistency, and securing buy-in from stakeholders pose less risk to the growth of the industry.

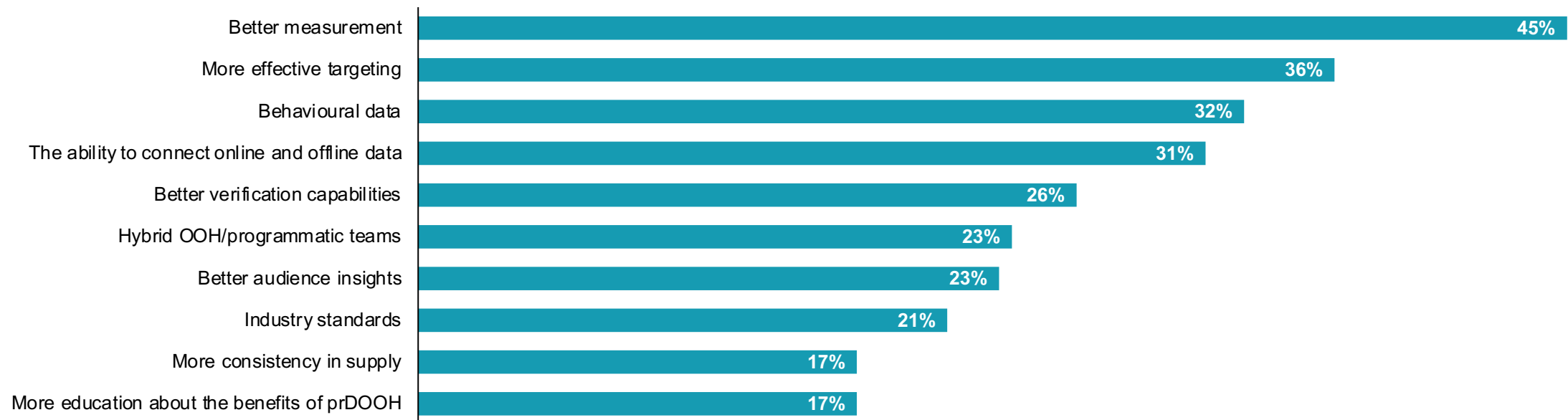


If you're experiencing challenges like these, check out our guide to [how to get started in prDOOH](#), or get in touch with the team – [uk.programmatic@jcdecaux.com](mailto:uk.programmatic@jcdecaux.com).

# WHAT WILL DRIVE THE GROWTH OF prDOOH IN 2023?

BUYERS WANT BETTER MEASUREMENT, MORE EFFECTIVE TARGETING, AND DATA

Measurement has been key to the growth of prDOOH over the past 12 months with 33% citing the ability to measure as one of the top reasons for investing in the channel. The importance of continuing to invest in evolving measurement strategies can be seen by the fact that 45% cite better measurement as a key driver for growth.



Find out more about the key trends that will shape DOOH in 2023 [here!](#)

# SUMMARY

## TRENDS THAT ARE SHAPING PROGRAMMATIC DOOH

### 1. MEASUREMENT:

While there are challenges in measurement; those that overcome those challenges cite the ability to measure performance as the number one reason for buying prDOOH

### 2. FULL FUNNEL:

prDOOH delivers across both brand and performance goals - more so than any other channel. The combination of precision targeting and virtually unmissable formats provide opportunities to drive awareness and sales

### 3. OMNICHANNEL:

The majority of prDOOH buyers are actively involved in buying other digital channels and two-thirds always or usually use an omnichannel DSP in which they also buy other programmatic channels

### 4. CREATIVE:

Dynamic creative optimization is going to boom as marketers look for more creative ways to capture audiences' attention

### 5. DATA AND TARGETING:

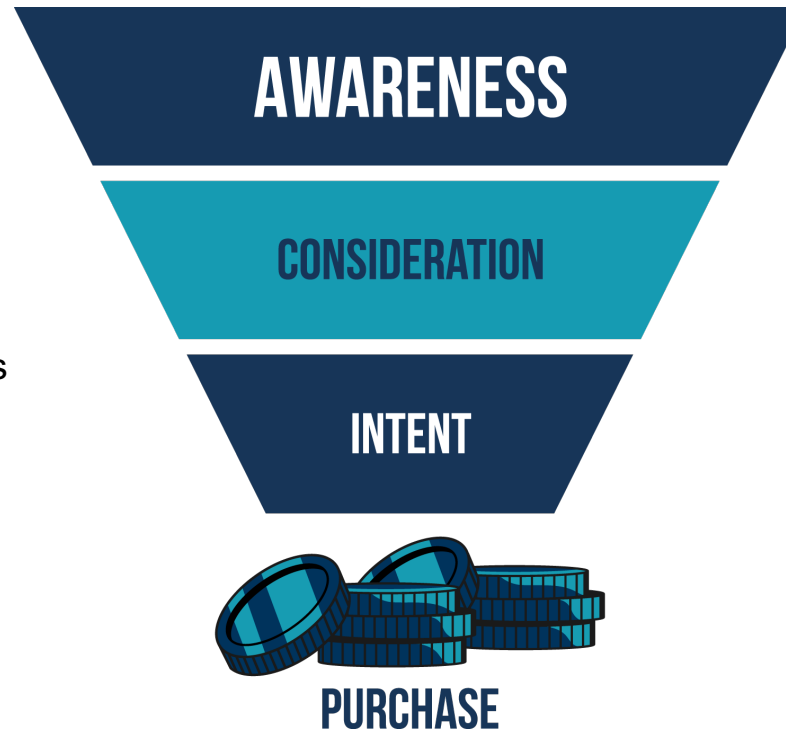
There is a lag between capabilities and use, untapped opportunities to integrate first-party data represent an opportunity for digitally-minded brands to maximise the effectiveness and efficiency of prDOOH

As we head into 2023 with marketers reporting that prDOOH is an integral part of an effective omnichannel marketing plan, there is no doubt that there will be continued innovation in this space. 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](mailto:uk.programmatic@jcdecaux.com).

# HOW JCDECAUX CAN HELP YOU ACHIEVE YOUR MARKETING GOALS WITH prDOOH

## ACTIVATION SOLUTIONS

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



## MEASUREMENT SOLUTIONS

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

# ← **ADDITIONAL RESOURCES AND INSPIRATION**

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

If you want to learn more about programmatic DOOH, check out the resources below:

- [How to get Started and Deliver Results with prDOOH](#)
- [The Digital Marketer's Guide to prDOOH](#)
- [Under the Hood of a prDOOH Campaign](#), in partnership with TPA Digital/TPA Labs
- [The Fundamental of prDOOH](#) – a free online training course co-produced with TPA Digital



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