



Journey to 10%

Programmatic DOOH

dentsu

Hello IAB and OMA



24 Years

OOH

LONDON / MOSCOW /
SHANGHAI / TOKYO

2 Years

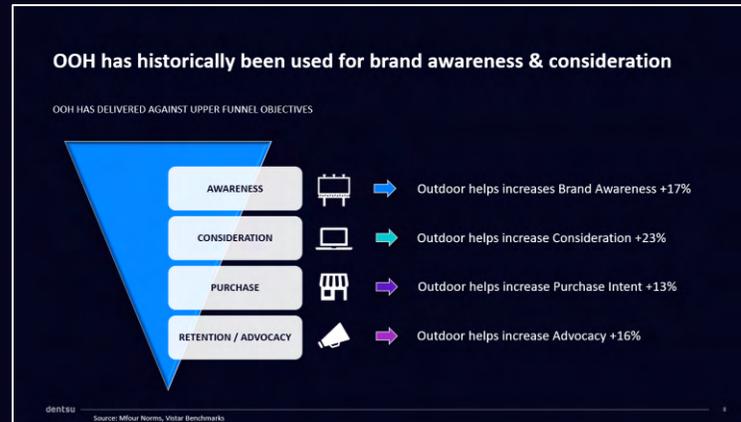
Global
OOH Lead

Out-of-Home has never been so relevant and important

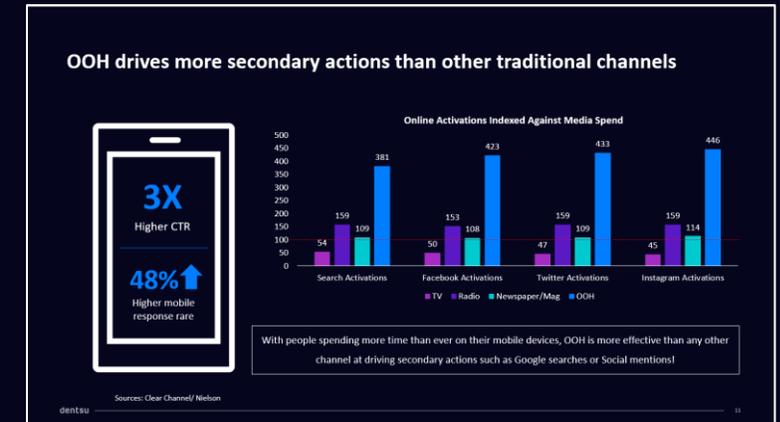
Reach Maximiser



Brand Builder



Action Driver



Trusted medium



A Force for Good



Creative Canvas¹⁰

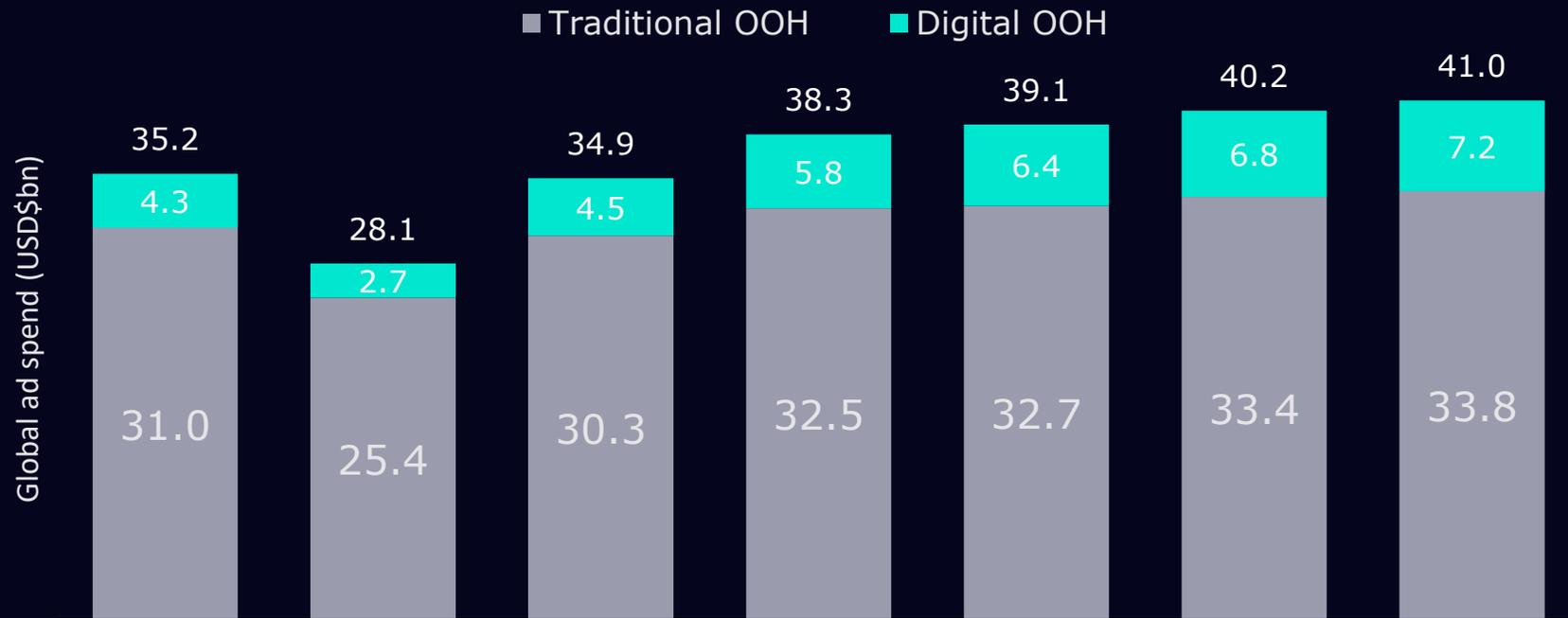


A blue, furry character with large white eyes and a wide black mouth, sitting at a table with a plate of cookies. One cookie is being held in its right hand.

Please don't
take away my
Cookies....

...I can't eat
context !

Whilst the outlook for OOH is strong, sector share growth remains the biggest challenge and opportunity



Total OOH Spend growth rate (%)	2019	2020	2021	2022f	2023f	2024f	2025f
	4.2%	-20.1%	24.0%	9.9%	2.0%	2.8%	2.0%
OOH share of total media (%)	6%	5%					

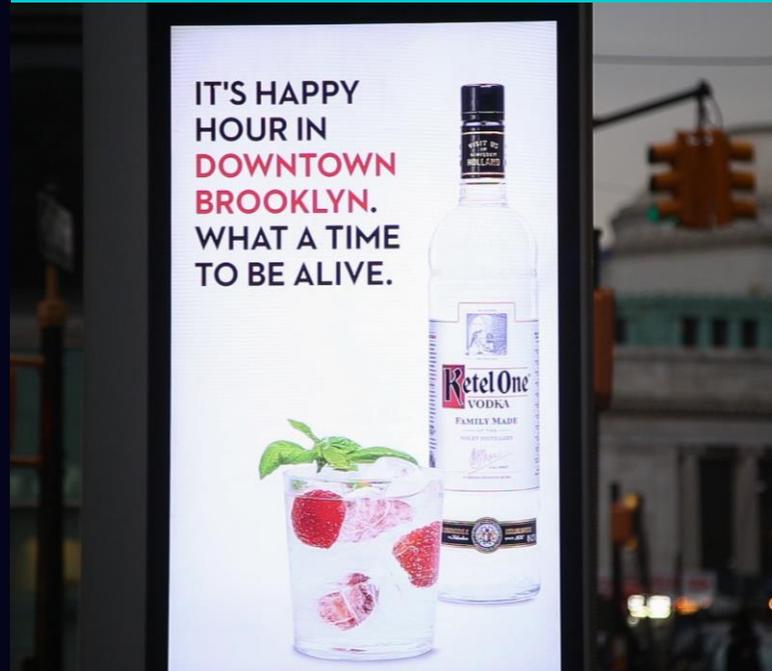
Addressable buying continues to grow

GLOBAL MEDIA



- \$703bn Media SPEND
- \$401bn DIGITAL SPEND (57%)
- \$280bn Traded Programmatically (70%)

GLOBAL OOH



- \$38bn SPEND
- \$15bn DIGITAL SPEND (39%)
- \$885m Traded Programmatically (2.3%)

GLOBAL DOOH

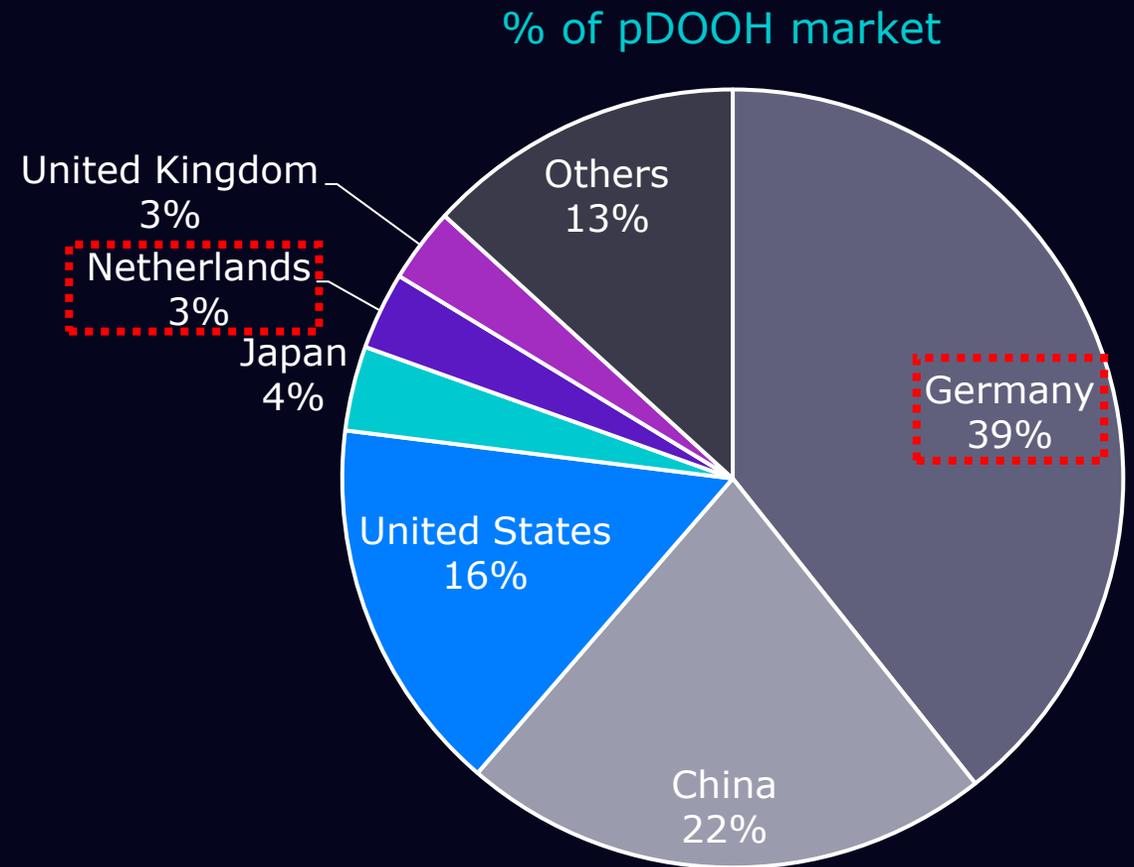


- \$15bn SPEND
- \$15bn DIGITAL SPEND (100%)
- \$885m Traded Programmatically (5.9%)

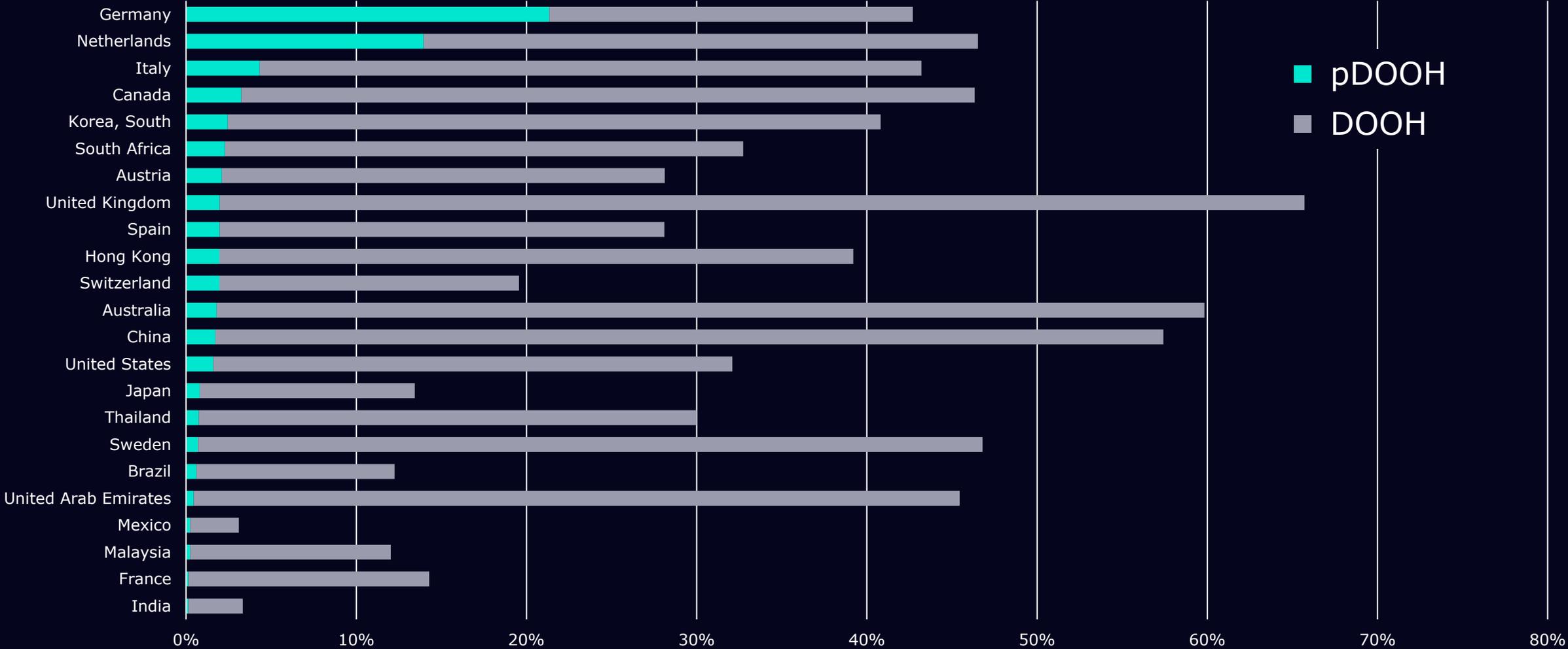
pDOOH spend primarily driven by overall market scale. Germany and Netherlands overindexing significantly

Top 6 markets = 80% of global OOH spend

Market	2022 OOH spend	2022 DOOH %
China	\$12bn	57.4%
United States	\$9.1bn	32.1%
Japan	\$4.1bn	13.4%
Germany	\$1.7bn	42.7%
UK	\$1.5bn	65.7%
France	\$1.4bn	14.3%
South Korea	\$681m	40.8%
Australia	\$667m	59.8%
Russia	\$600m	47.6%
Next 15	\$4.7bn	30.7%



2022 DOOH & pDOOH % of total OOH market



Source: World out-of-home organisation, Dec 2022

MARKETER

Agencies

Holding Companies

IFG WPP dentsu

OmnicomGroup

HAVAS MDC Partners

HAKUHODO

ECP

OOH Specialists

kinetic Billups

Posterscope

Project X

rapport

pmx agency

oohawilkins

MPC MEDIA

Talon

Consumer Data

AT&T IRI verizon

MRI SIMMONS TransUnion

experian. EQUIFAX

dynata Nielsen Catalina

claritas T-Mobile

HID

metroFCS

MarketTrack

Media Planning

Nielsen

IPONWEB

telmar

geopath

Attribution / Measurement / Verification

alphonso

neustar

factual

claritas

OUTFRONT/

ABRAXAS TECHNOLOGY

Data Collection

Location Data

FOURSQUARE

Placed

here

Anonymous Video Analytics

AD Mobilize

sightcorp

ayonix

Proximity Hardware

Intersection

BoardActive

estimize

DSPs

VISTAR MEDIA

mobilefuse

AdQuick

Basis

GroundTruth

Omnichannel

Google AMOBEE

theTradeDesk

Sizmek

VIANT

Roku

Attribution / Measurement / Verification

cuebiq

neustar

factual

claritas

OUTFRONT/

ABRAXAS TECHNOLOGY

Data Collection

Location Data

FOURSQUARE

Placed

here

Anonymous Video Analytics

AD Mobilize

sightcorp

ayonix

Proximity Hardware

Intersection

BoardActive

estimize

SSPs / Exchanges

PLACE EXCHANGE

BroadSign

VISTAR MEDIA

Hivestack

SIGNKICK

taggify

Content Management

AERVA

AYUSA

Grand

Media Management & Operations

SOAD

OPERATIVE

DMPs

LOTAME / LiveRamp

DATA PAND

neustar

SIGNAL

bulzi

KBM GROUP

Omnichannel

Magnite

xandr

OpenX

Content Management

BroadSign

Reflect

Grand

Media Management & Operations

AdSemble

OPERATIVE

Ad Servers

AYUSA

BroadSign

kevel

virol

trigger

Hardware

Publishers

SILVERCAST

Clear Channel

BIG OUTDOOR

Intersection

Vugo

LAMAR

ATMOSPHERE

Octopus

ENLIGHTEN

ami

lightbox

CAPTIVATE

BOLDSITE

Wrapify

GSTV

ROUGE Media

PACIFIC

COLLOSSAL

OOH DISPLAYS

PEOPLE

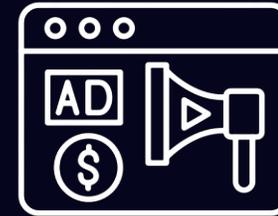
There are three ways to trade OOH. Need to enable all 3



Direct



Automation



Programmatic

Slow & Deliberate Progress

1000

DSP Buyers



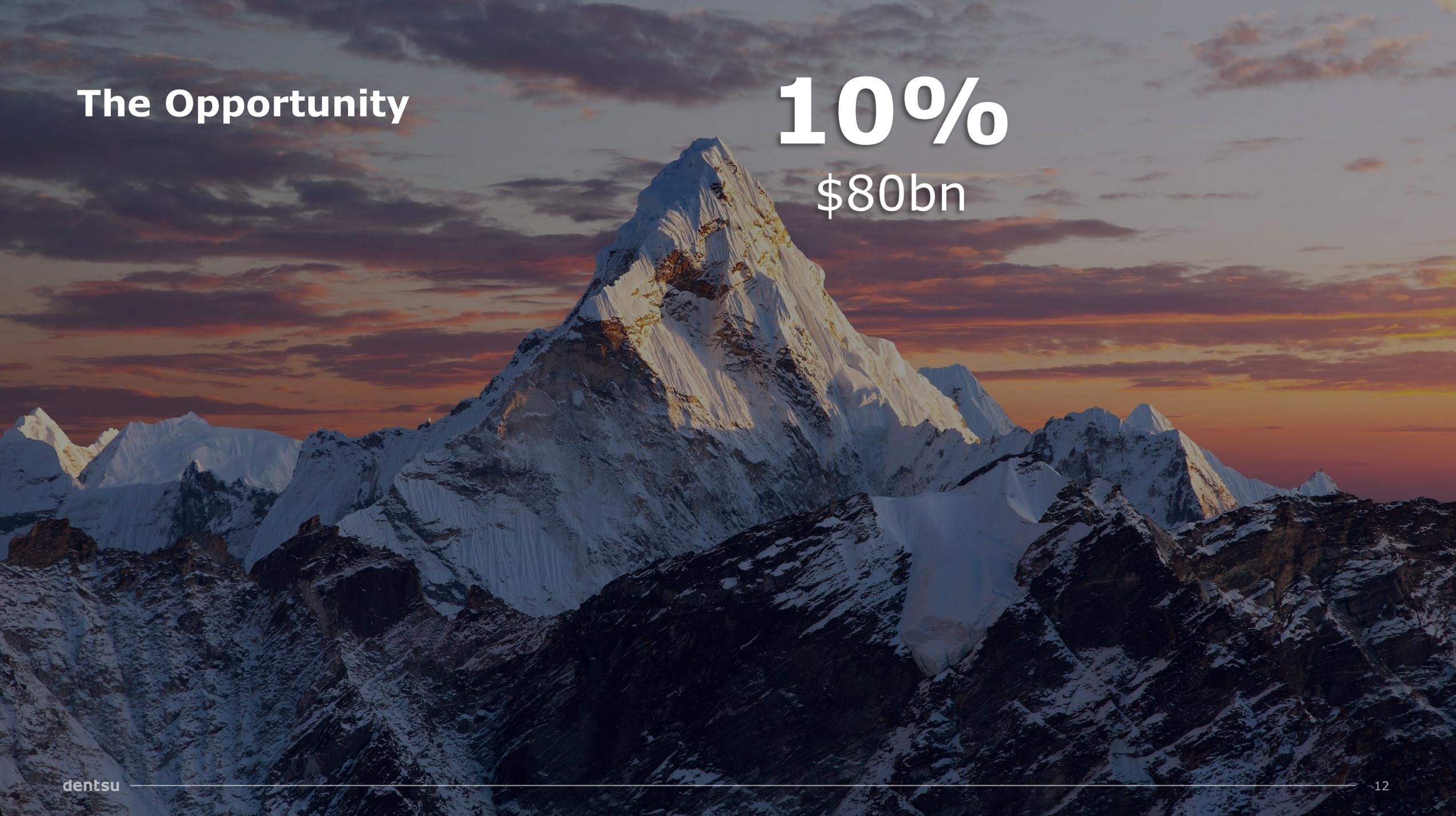
100+

Active Clients



+78%

YOY Spend



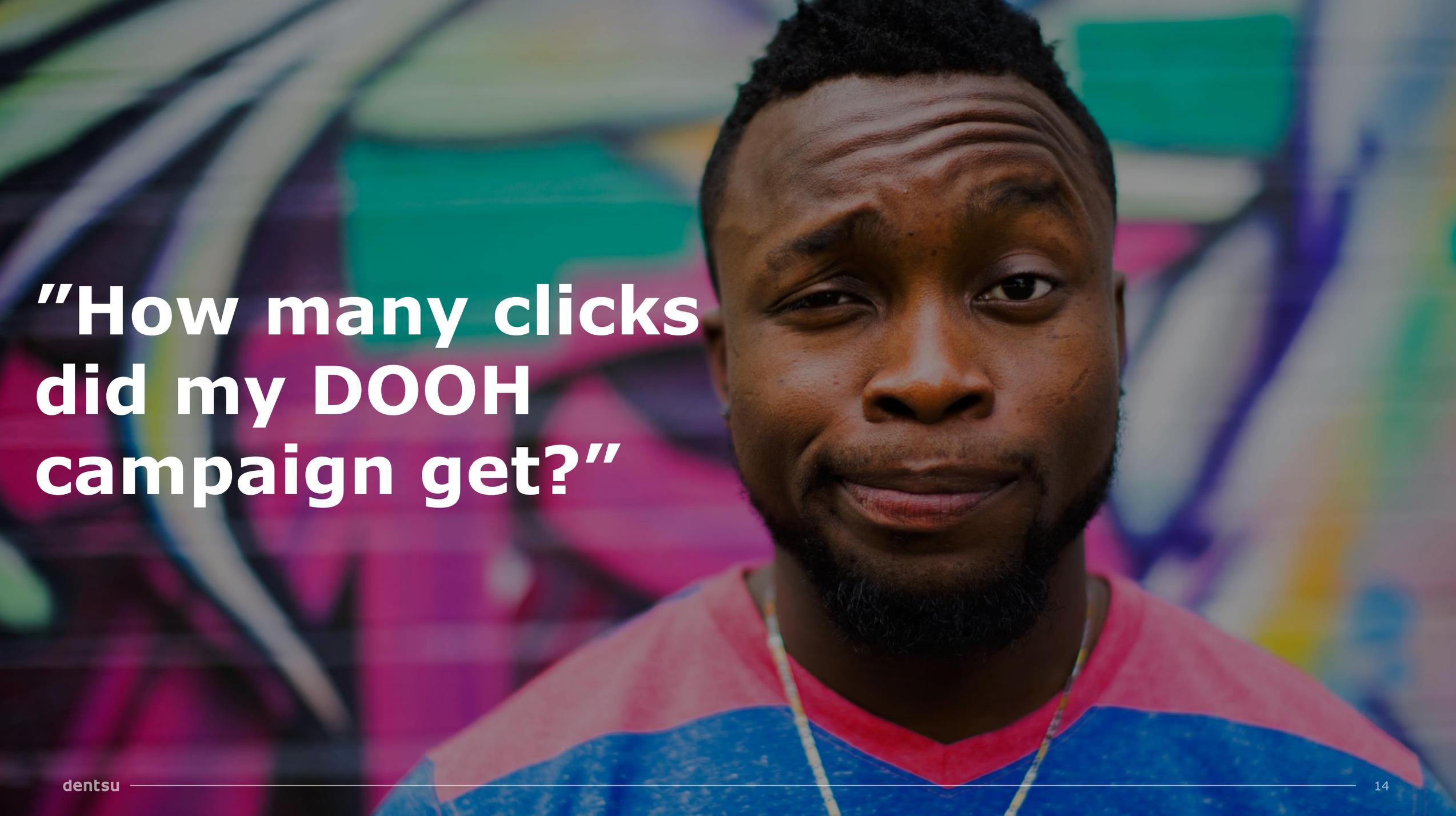
The Opportunity

10%
\$80bn

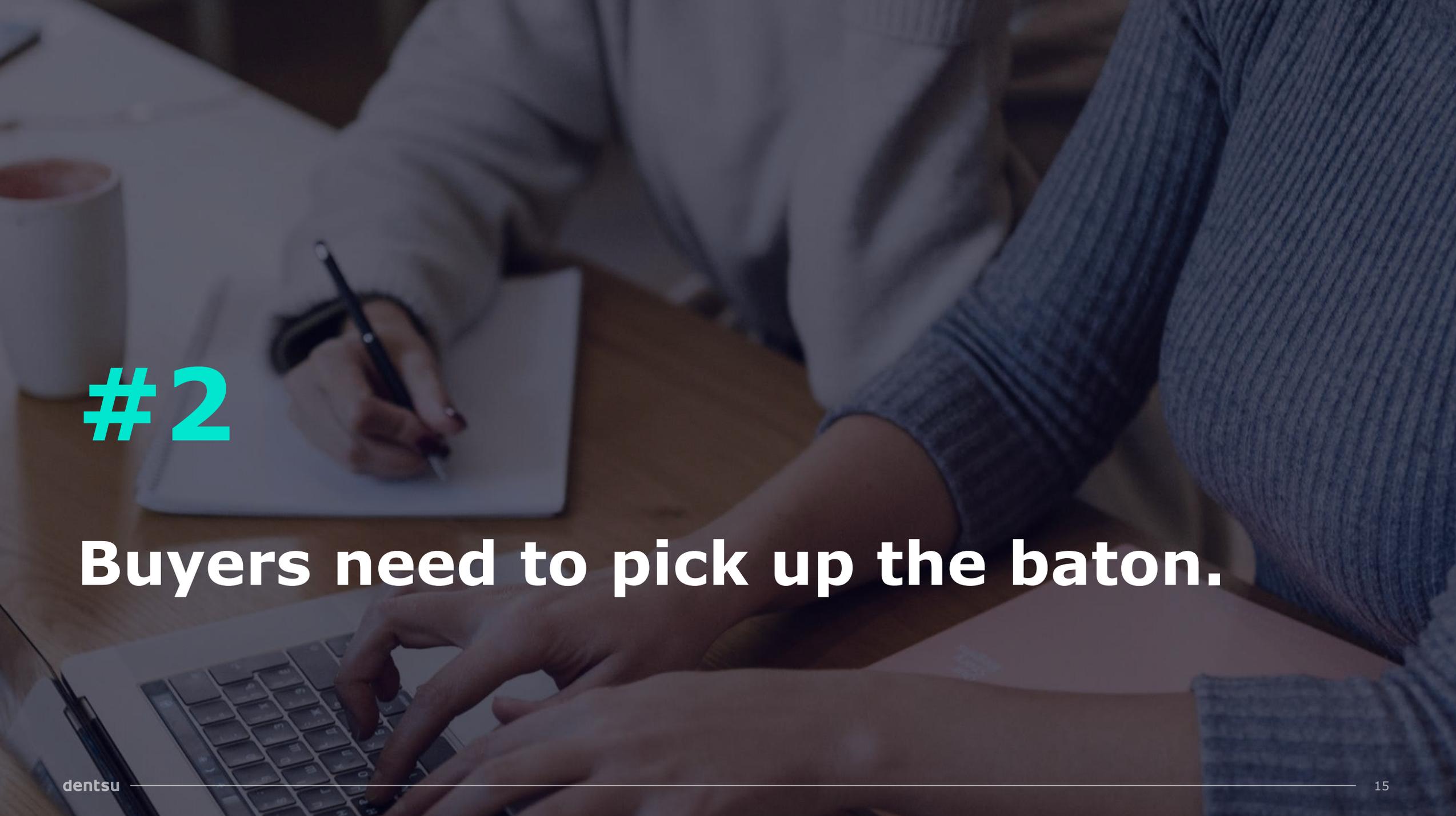


#1

**Keep it simple, cut the jargon and
acknowledge the limitations**



**“How many clicks
did my DOOH
campaign get?”**



#2

Buyers need to pick up the baton.

Integrating capabilities and expertise in-house at dentsu

Bringing Addressable and OOH talent together
Fusing OOH Expertise with Programmatic Technology







#3

Find a seat at the table.

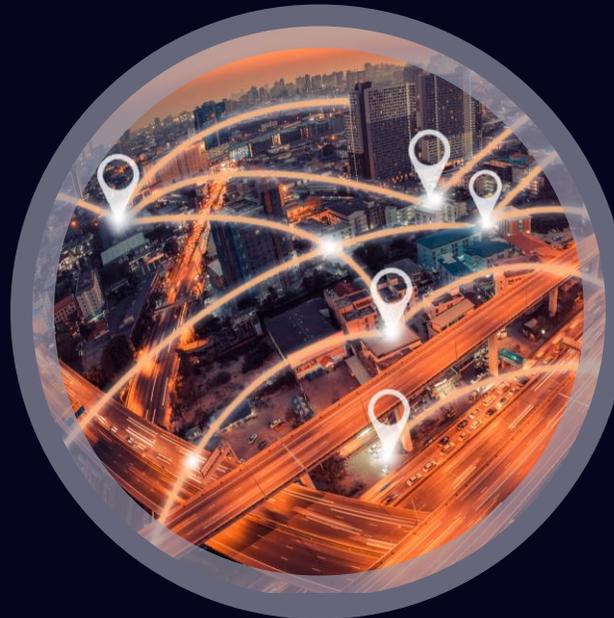
dentsu

IDENTITY



AUDIENCE

ATTENTION



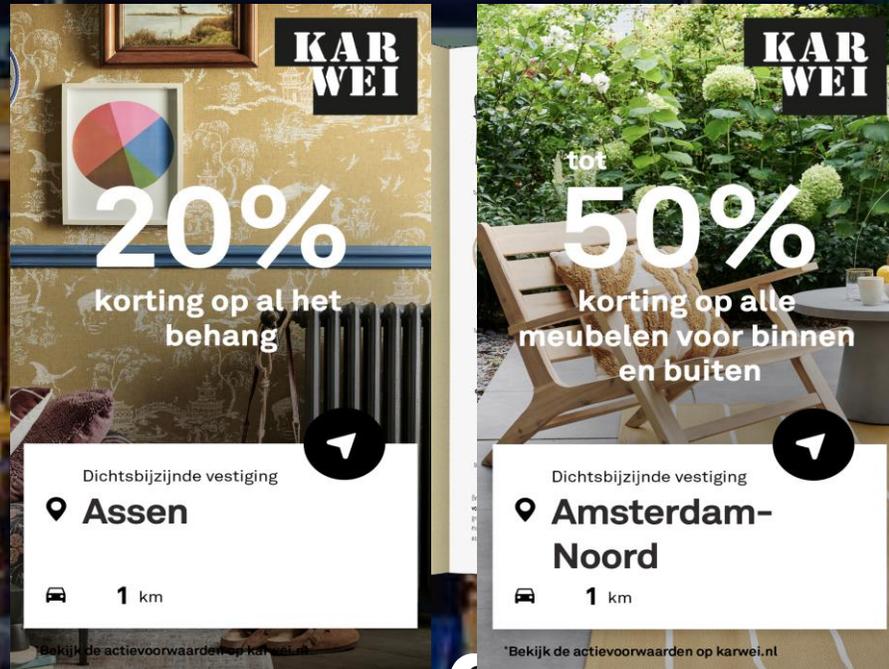
LOCATION

CONTEXT



PHYSICAL CONTEXT

Karwei (Netherlands)



Door drops pDOOH

RESULT

Lift in store visitation
10x budget into OOH

Tommy Hilfiger – Western Europe



Core locations



pDOOH

Defined role and budget for pDOOH

Targeting tightly defined social audiences outside core locations

Retargeting visitors to competitors



#4

Consistency is key to growth.



PRECISION



SPEED



AGILITY



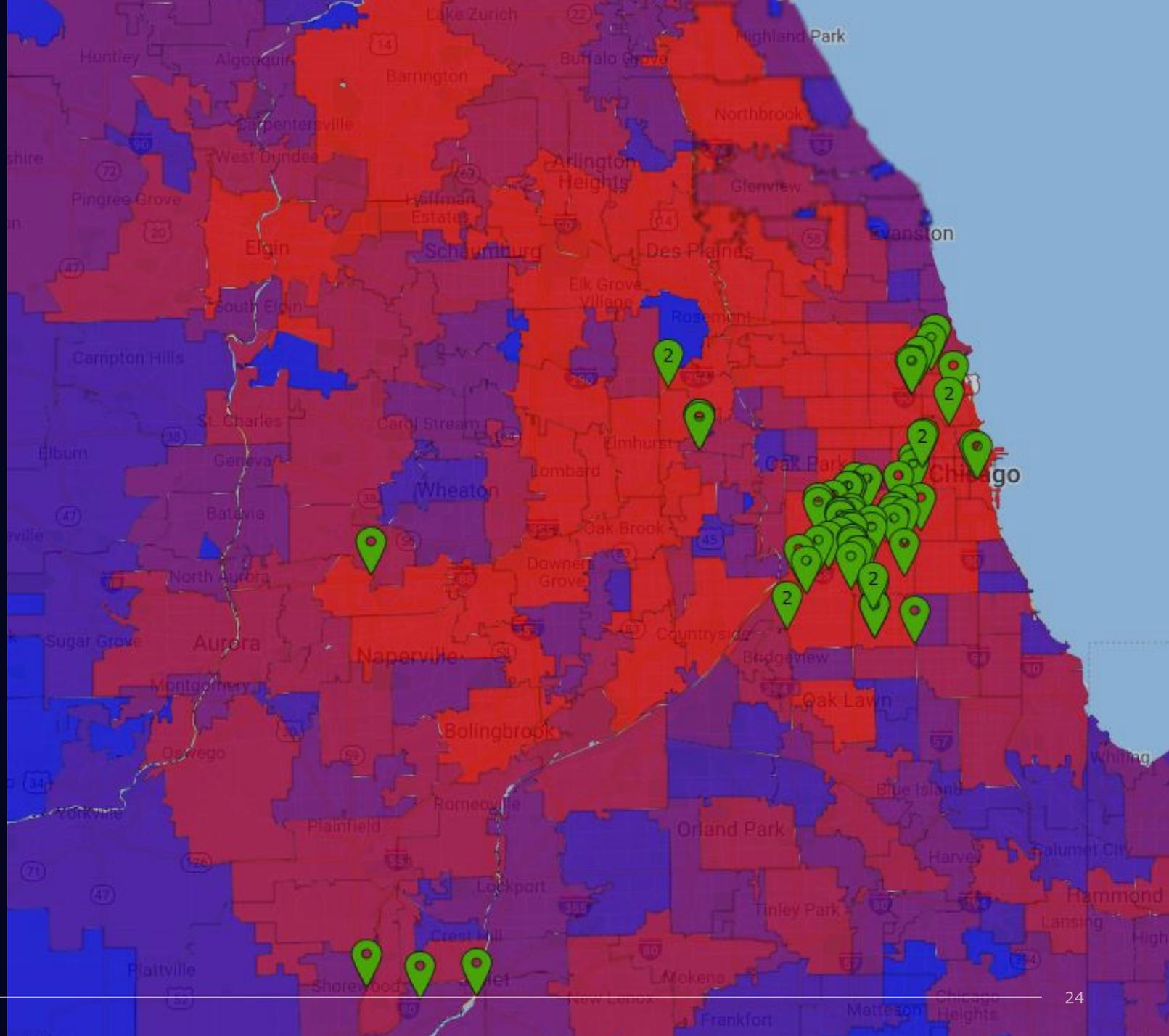
Precision



+

MERKURY

1. 1:1
2. 1st Party Audiences
3. Omni-channel Activation
4. Smarter Targeting
 - Location
 - Time
 - Context



CASE STUDY: M1 targeting increased web visitation for RE/MAX

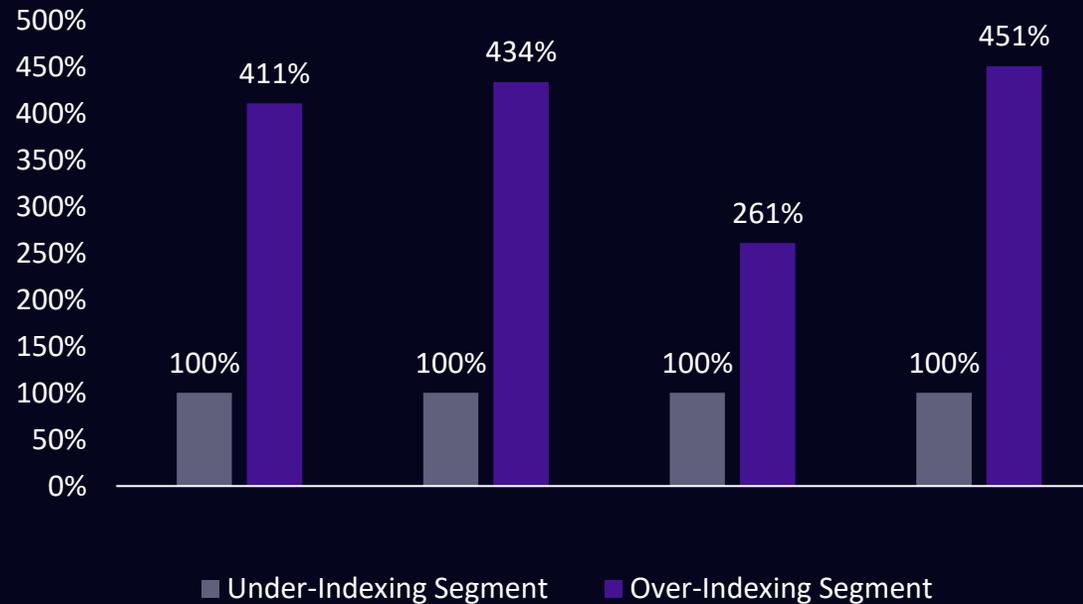
OBJECTIVE

/ Confirm the applicability and effectiveness of targeting M1 segments in the OOH channel. In particular, demonstrate that screens over-indexing on reach for target M1 segments for a given advertiser deliver significantly better performance than screens that under-index on those target segments.

EXECUTION

/ The media was programmatically purchased using targeting parameters to only activate in zip codes where OOH of a specific M1 audience over-indexed. For purpose of this test, in the first two weekends, media ran in zip codes that over-indexed for the M1 audience and under-indexed for the M1 audience.

Indexed Segment Response



2.5x

lift for Home Page visitation

4.3x

lift for Property Search Page visitation

Speed

- 1. Real-time Decision Making**
 - 2. Business Outcomes**
 - 3. Market Conditions**
 - 4. No Booking Deadlines**
 - 5. Artwork Lead Times**
-





LIVE FLIGHT PRICING

Triggering priority routes based on British Airways' business requirements with live pricing

BRITISH AIRWAYS

Dreaming of Verona?

Fly London Gatwick from
£42 pp each way, base
on a return fare
ba.com/gatwick
Limited availability at price shown

Terms and conditions apply. See [ba.com/gatwick](#) for details.

Wandsworth



Agility

1. Moments Targeting
2. Flexible Delivery
3. Pay per Play
4. Real-time Optimization
5. Dynamic / Contextual Messaging



London's Best 5G

Based on messaging data performance over 30.

vodafone

global

London's Best 5G

Stoke Newington 73

LTZ152U

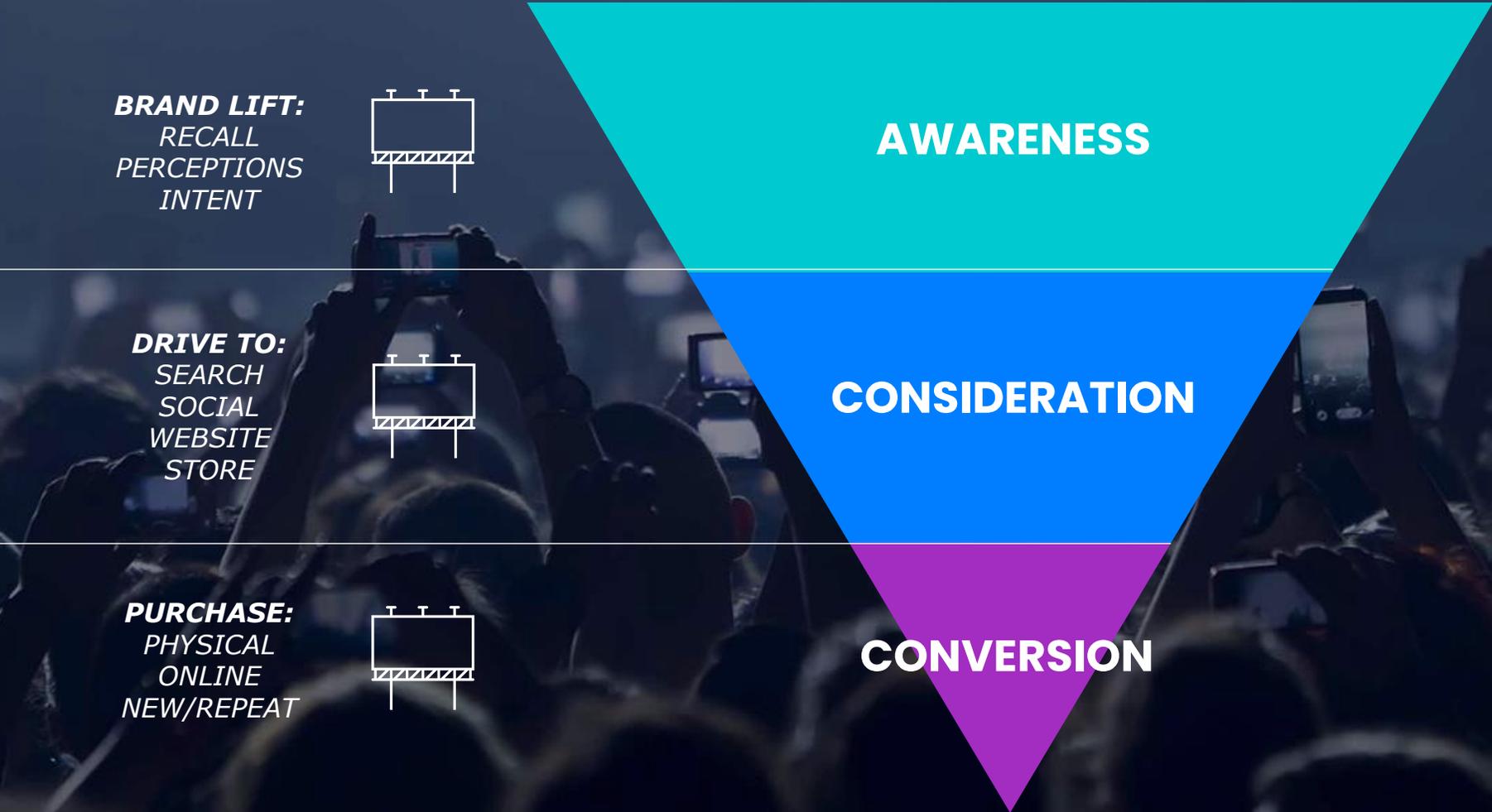
A person wearing a blue hoodie is seen from behind, with their arms raised in a gesture of triumph or success. The background is a soft, colorful sunset or sunrise over a body of water, with the sky transitioning from dark blue at the top to warm orange and yellow near the horizon. The overall mood is one of achievement and optimism.

#5

Define and measure success.

“Stop creating a false distinction between Performance Marketing and Brand Marketing. It all performs. Some of it just requires different measurement techniques and happens over different time horizons. The most important thing is that you define success and measure it.”

OOH contributes across the purchase funnel



Case Study: Dealership Visitation

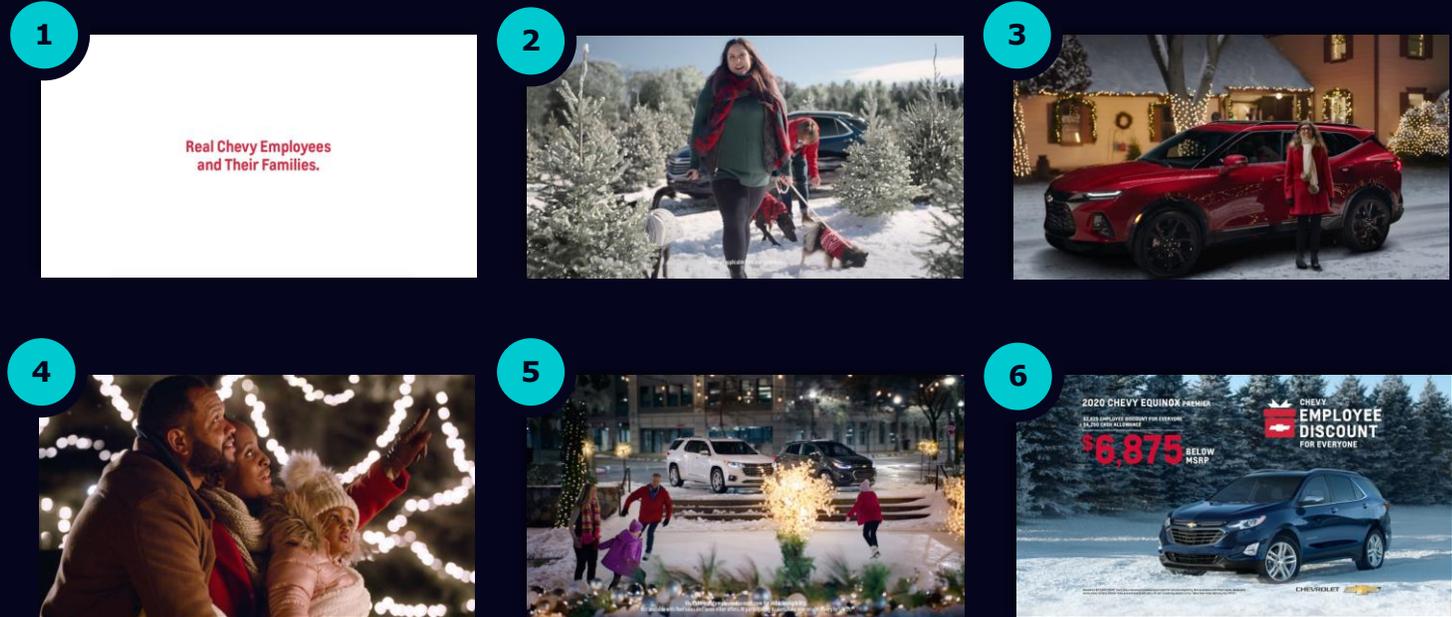
Objectives:

To understand if Programmatic DOOH drives incremental uplift to dealerships for the Employee Discount campaign

To determine if GSTV locations that index highly against the M1 audience drive more traffic than standard locations

Approach:

Activated DOOH media across the GSTV network

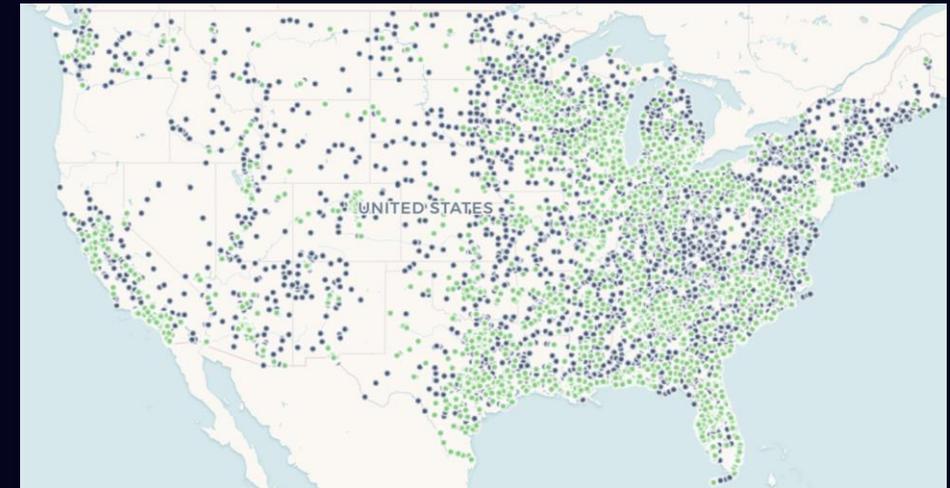


Case Study: Dealership Visitation



FOURSQUARE

	TOTAL CAMPAIGN	M1 DATA OPTIMIZED	NON-DATA OPTIMIZED
BEHAVIORAL LIFT	+6.30%	+11.01%	+4.38%
DEALER CONVERSION RATE	6.68%	7.09%	6.52%
INCREMENTAL VISIT INDEX	100	178	70



#6

Remember, it is still
Out of Home.



**MARKET
NUANCES**

**LOCATION
DATA**

**ENVIRONMENT
/ CONTEXT**

**FORMAT
SELECTION**

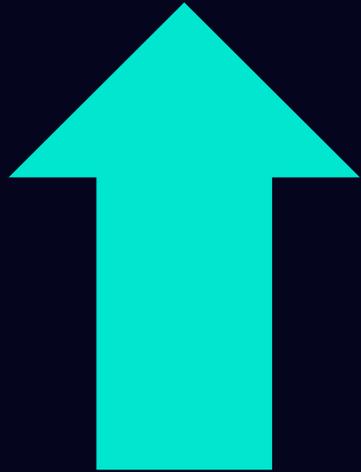
**PRICING
BENCHMARKS**

**FLIGHTING /
DAY-PARTING**

**CREATIVE BEST
PRACTICES**

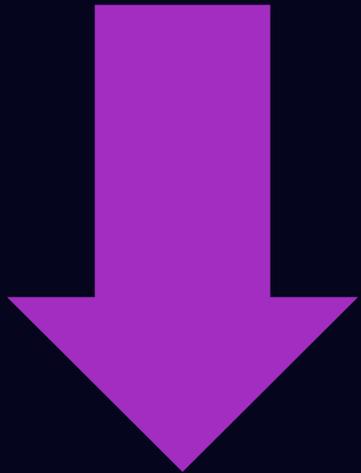
**REGULATORY
EXPERTISE**

Caretaking the medium



POSITIVE

- New buyers, brands and spend into the OOH channel
- Repeat advertising – it's obviously working



NEGATIVE

- Brands care about the brands they are seen with
- Poor creative devalues the consumer experience
- Long term negative impact on attention to OOH





Journey to the 10%

- 1. Keep it simple, cut the jargon**
- 2. Buyers need to pick up the baton**
- 3. Find a seat at the table**
- 4. Consistency is key to growth**
- 5. Define and measure success**
- 6. Remember, Programmatic DOOH is still OOH**



The image is a composite. The top half shows a view of the Earth from space, showing the blue oceans and white clouds against the blackness of space. The bottom half shows a close-up of a human eye, with the iris and pupil visible. The text "Are all impressions equal?" is overlaid in the center, spanning both the Earth and the eye.

Are all impressions equal?

A vibrant green heart-shaped leaf is centered on a dark blue background with a complex, glowing circuit board pattern. The leaf's veins are clearly visible, and its shape is a classic heart. The circuit board pattern consists of numerous thin, light-colored lines and circular nodes, creating a dense, intricate network. The overall image conveys a message of environmental awareness and technology.

What is the environmental impact?



What's next?

