attitudes to
programmatic DOOH

iab. australia

2024

iab digital out-of-home working group.

the **iab thanks** the following organisations for their support in this study.

BENCH
Broadsign
cartology
ENIGMA
essence
Google
groupm
Hearts & Science
Hivestack
HOWATSON +COMPANY
JCDecaux
LEMMA
Match & Wood
MiQ
nexxen
OiS
ooh!
OUTDOOR MEDIA ASSOCIATION
QMS
SCENTRE GROUP
seedooh
theTradeDesk
TONIC MEDIA NETWORK
VERIDOOH
VIOOH
vistar media
VMO
yahoo!

contents.

01.	methodology	04
02.	executive summary	05
03.	experience with OOH, DOOH, PDOOH advertising	06
04.	drivers for programmatic DOOH	10
05.	objectives for programmatic DOOH	14
06.	measuring programmatic DOOH ad effectiveness	18
07.	planning and buying programmatic DOOH	23
08.	usage of DOOH creative formats	29
09.	opportunities for growth	32

01. methodology.

The 'Attitudes to Digital Out-of-Home Advertising Industry Survey' was carried out in March 2024

- The aim of this yearly study is to understand the state of play for programmatic and all digital out of home media trading in Australia, exploring needs of buyers and opportunities for growth as the market develops. This information helps the IAB DOOH Working Group with prioritisation for the development of industry standards, resources and education.
- The survey collected responses from 286 advertising professionals from ad agencies or brands with influence on advertising decision making and involvement with out-of-home advertising.
- Responses have been analysed across key industry groups:
  - 226 ad agencies (incl media agencies, digital agencies, creative agencies and agency trading desks) with 60% from a holding group agency and 40% from an independent agency.
  - 60 brands and advertisers
- This survey has previously been conducted in May 2021 and July 2022 (see IAB report published as Attitudes to DOOH 2022).

02. executive summary.

Regular consideration of digital out-of-home advertising has grown over the last 3 years and amongst users of programmatic DOOH frequency of consideration has increased, as these users grow understanding and experience. While agency usage of programmatic DOOH advertising has increased over the last 3 years, it is not yet broadly embedded as a regular or significant part of activity.

Agencies and brands are using a combination of programmatic buying methods for DOOH. Over the last 2 years, private market places have become the most common way to buy programmatic digital out-of-home advertising, taking over from open exchanges.

Data and targeting as well as flexible buying capabilities continue to be the dominant drivers for usage of programmatic DOOH advertising. These along with contextual relevance of environment, enhanced reach and operational efficiency have all increased over the last 2 years as major factors for considering programmatic DOOH.

Programmatic DOOH continues to be predominantly used for brand building. Over 8 in 10 agencies are using programmatic DOOH advertising to increase brand awareness, similar to levels using digital video and digital audio advertising for branding. For programmatic DOOH campaigns, branding is coupled with the secondary objective of driving purchase intent or action.

Most agencies are planning activities for OOH, DOOH and programmatic DOOH within the same agency team with more agencies now planning and buying these within the same agency team. However, agencies are calling for standardised measurement across these platforms to ensure transparency, comparability and facilitate OOH, DOOH and programmatic DOOH integration into multi-channel campaigns.

The assessment of out-of-home advertising is focused on campaign delivery reporting (audience and impressions), rather than the impact of advertising on business outcomes. Aligned with the predominant objective of brand building, digital brand lift and cross-media brand lift surveys are considered important and sometimes used to assess programmatic DOOH activity (along with brand measures these surveys often measured purchase intent). However, Market Mix Modelling used to measure return on investment in the context of all marketing activities is considered less important for OOH advertising.

Creative testing is deemed an important tool for out-of-home advertising and agencies are at least sometimes adapting DOOH ad creative to suit the viewing environment. The buy-side are calling on digital OOH media owners to collaborate with creative specialists and partners, which they think will help drive greater ad effectiveness and the adoption of Dynamic Creative Optimisation.

Although understanding of programmatic digital out-of-home advertising has improved since the last survey, it remains lower than the understand of classic and digital out-of-home advertising and continues to be the biggest issue preventing programmatic digital out-of-home advertising from being a larger proportion of advertising volume. Education for both agency planners and within media owner sales teams is required to upskill for programmatic DOOH.

Positioning of programmatic digital out-of-home as non-guaranteed also continues to be an important issue preventing it being a larger proportion of ad volume. Similar to OOH and digital OOH advertising, understanding the cost versus benefit is important for programmatic DOOH growth as there is a perception programmatic DOOH is significantly more expensive. Evidence of effectiveness, along with measurement and tracking are also industry challenges.

03.

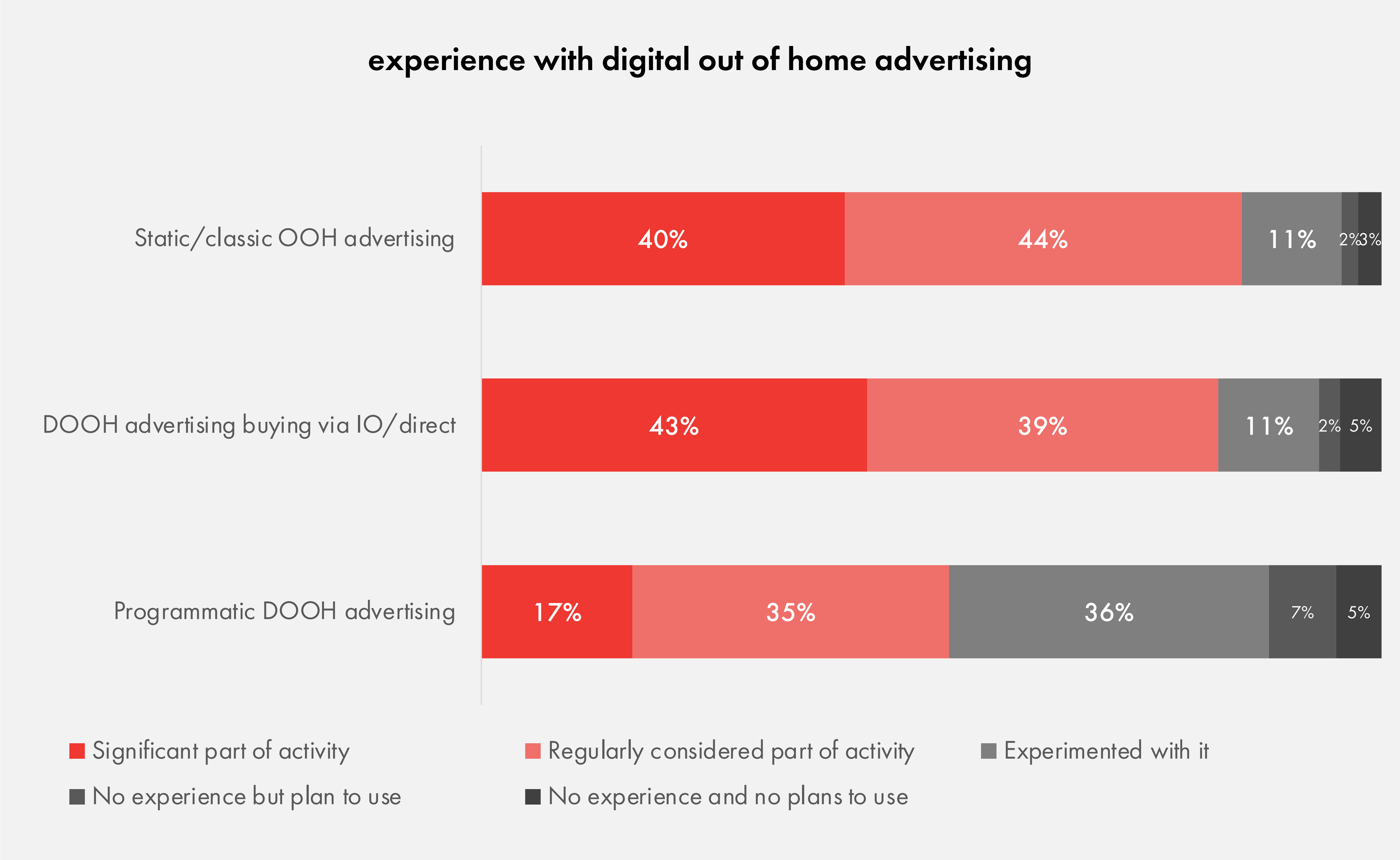
experience with OOH, DOOH, PDOOH adverting.

experience with out-of-home advertising.

Amongst all survey respondents, over 8 in 10 have static/classic OOH advertising (84%) and digital OOH advertising via IO/direct (82%) as a significant or regularly considered part of their advertising activity.

The sample of respondents to this year's survey are more regular users of both OOH and DOOH via IO/direct advertising than the sample of respondents for the 2022 survey.

Just over half (52%) of respondents have programmatic DOOH as a significant or regularly considered part of their activity and a further 36% have experimented with it. This experience with programmatic DOOH is very similar to the 2022 survey.



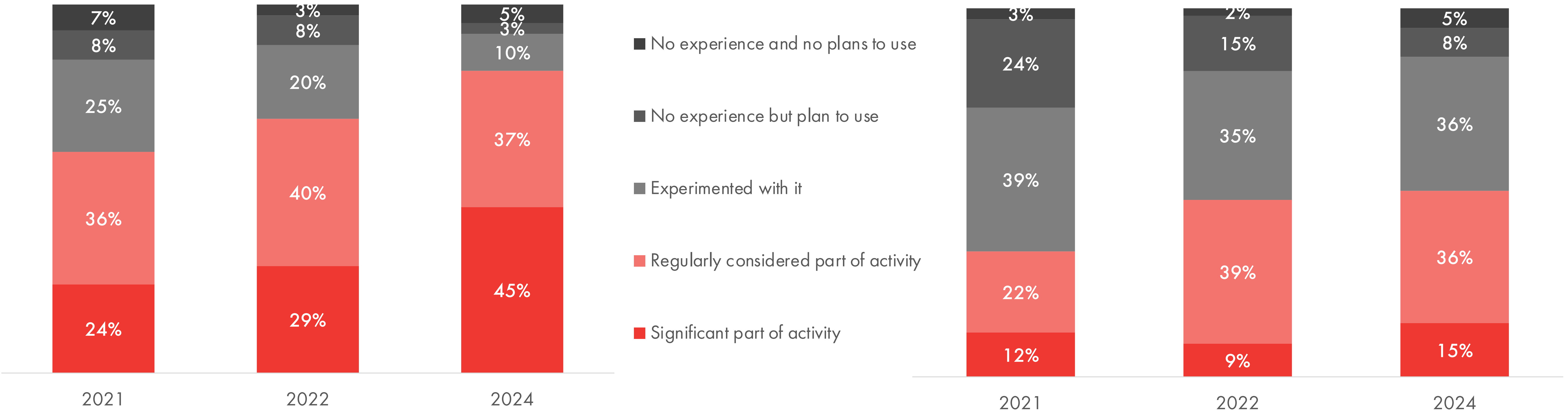
Q- Which of these best describes your organisation's experience with static/classic out-of-home advertising/ digital out-of-home advertising buying via IO/direct / programmatic digital out-of-home to date? Base all respondents n=286

experience with DOOH advertising amongst agencies.

Experience with digital out-of-home advertising is growing. Amongst all agency respondents, 82% have digital OOH advertising via IO/direct as a significant or regularly considered part of their activity, this is up from 69% in the 2022 survey (and from 60% in the 2021 survey). 87% of agencies have now used programmatic DOOH, up from 83% in 2022. Half of agency respondents (51%) have programmatic DOOH advertising as a significant or regularly considered part of their activity, this is up slightly from 48% in 2022 (and up from 34% in 2021).

experience with digital out-of-home advertising (amongst agency respondents)

buying via IO/direct | **buying programmatic**



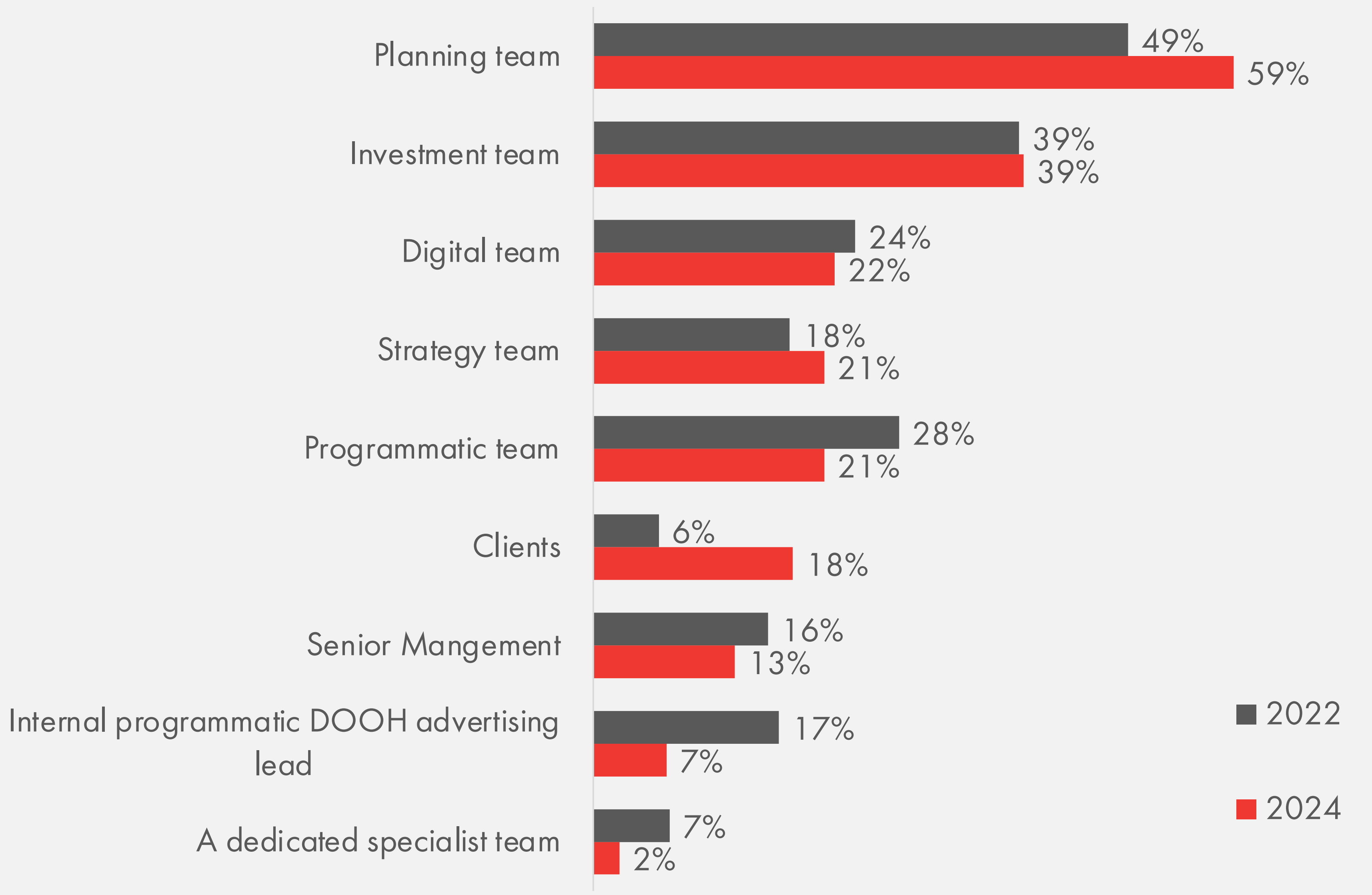
Q- Which of these best describes your organisation's experience with digital out-of-home advertising buying via IO/direct / programmatic digital out-of-home to date? Base agency respondents n=226

agency planning teams have the most influence on participating in programmatic DOOH advertising.

Within agencies, planning teams are having the most influence on participation in programmatic digital out-of-home advertising.

The influence from planning teams has increased since the previous survey in 2022, along with increasing influence from clients.

influence on participating in programmatic digital out of home advertising (amongst agency respondents)



Q-Within your agency, who is having the most influence on participation in programmatic digital out-of-home advertising? (Select all that apply) Base all agency respondents n=226

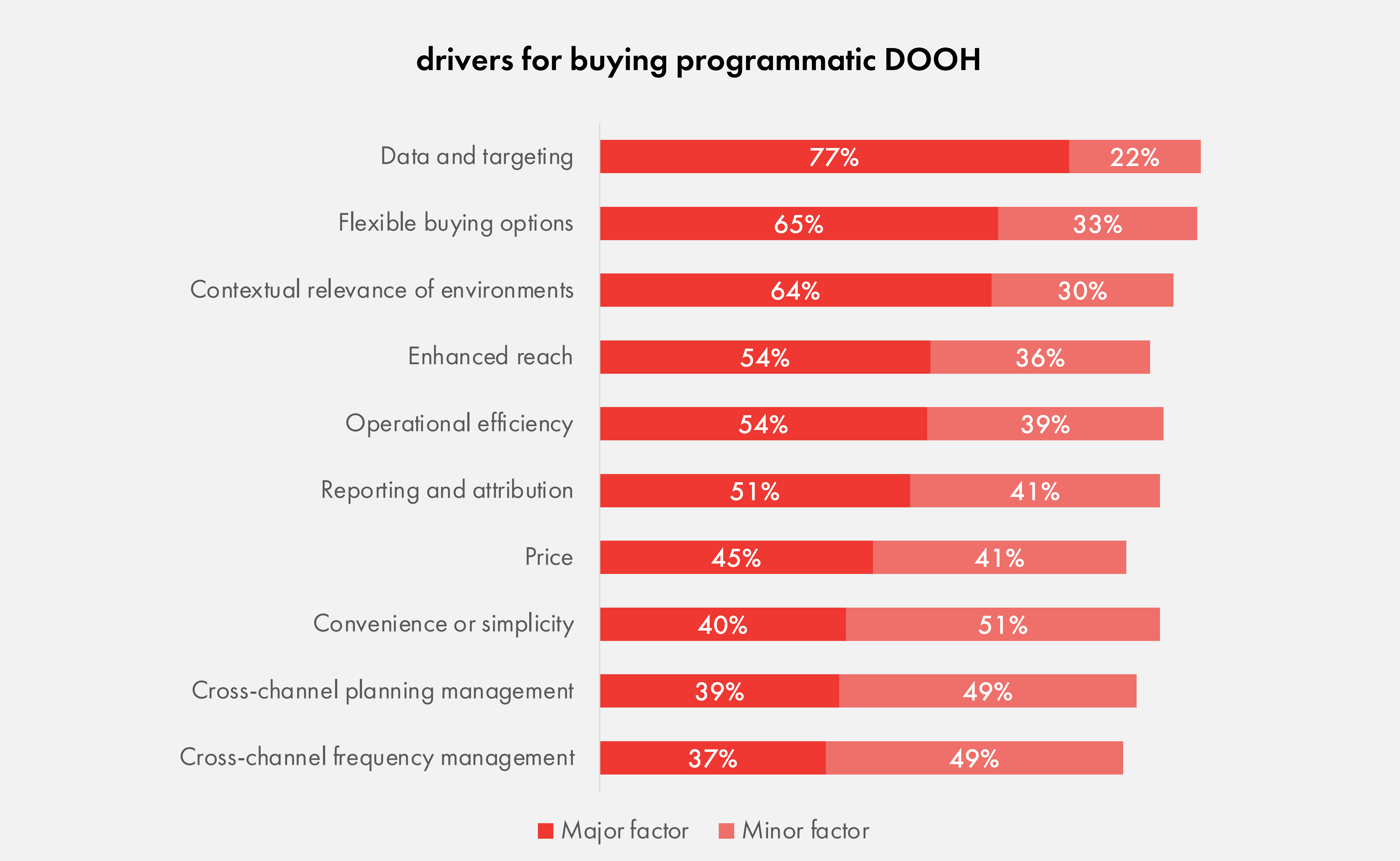
04.
drivers for buying PDOOH advertising.

drivers for buying programmatic DOOH.

Data and targeting remains the #1 driver for buying programmatic DOOH.

Data and targeting is a factor for nearly all respondents for buying DOOH advertising programmatically, and a major factor for 77% of respondents.

Flexible buying is also a factor for nearly all respondents, with 65% having flexibility of programmatic as a major driver for usage.



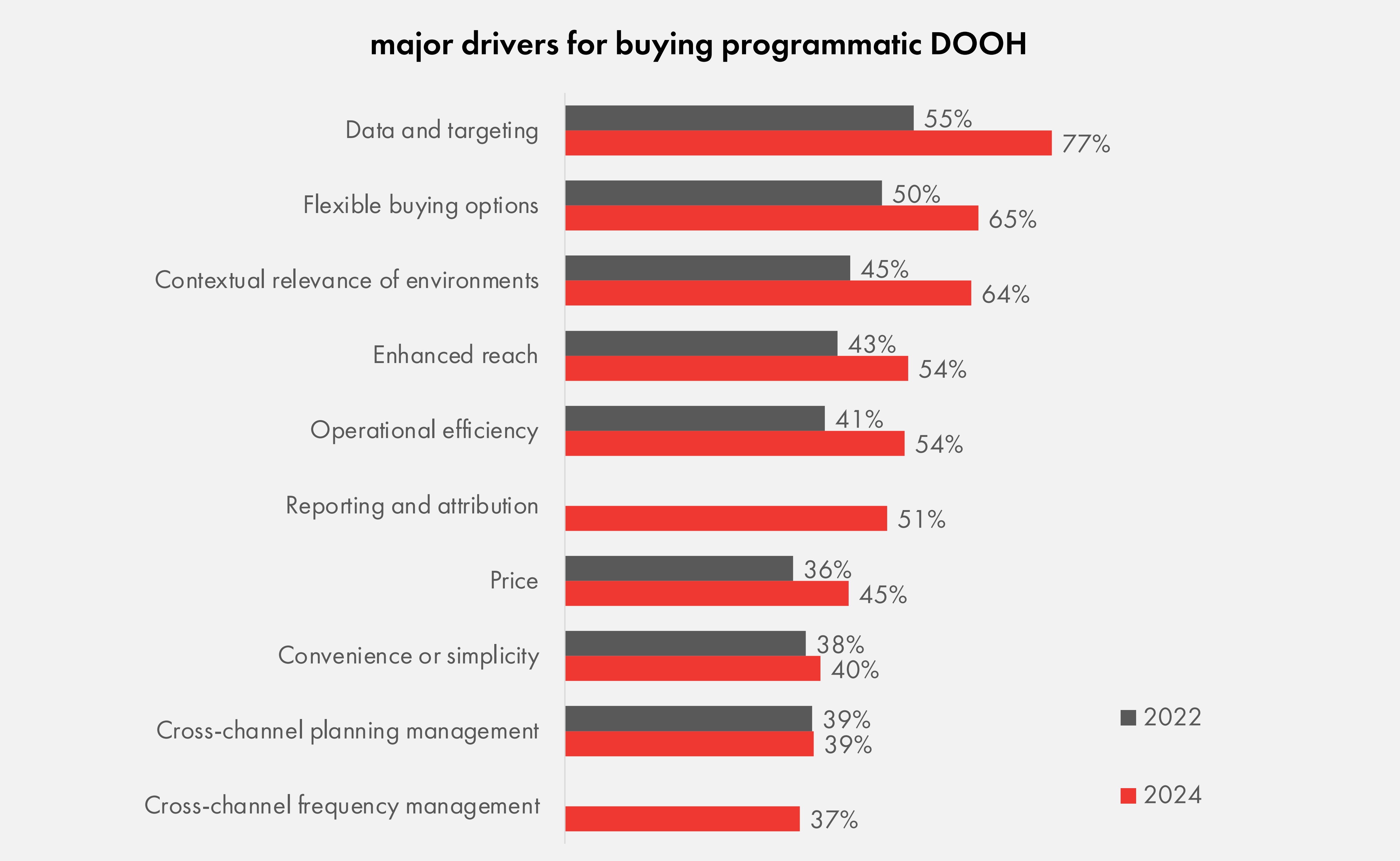
Q- In your considerations for digital out-of-home advertising, which of the following have been factors for buying programmatically? Base all respondents n=286

drivers for buying programmatic DOOH.

Data and targeting remains the #1 driver for buying programmatic DOOH.

Most of the drivers for usage of programmatic DOOH have increased as major factors since 2022, the top 5 drivers have increased significantly.

Reporting and attribution as well as cross-channel frequency management were added to the survey for the first time in 2024.



Q- In your considerations for digital out-of-home advertising, which of the following have been factors for buying programmatically? Base all respondents n=286

drivers for buying programmatic DOOH.

Data and targeting is a major factor for 8 in 10 agencies (83%) for buying DOOH advertising programmatically.

Brands and advertisers are attracted to the operational efficiencies and flexible buying options programmatic DOOH offers, more than data and targeting capabilities.

Note the small sample size of brands and advertisers.

top drivers for buying programmatic DOOH

amongst agencies		amongst brands/advertisers	
1. Data and targeting	83%	1. Operational efficiency	58%
2. Contextual relevance of environments	73%	2. Flexible buying options	55%
3. Flexible buying options	68%	3. Data and targeting	55%

Q- In your considerations for digital out-of-home advertising, which of the following have been factors for buying programmatically? Base all respondents n=286 (agency respondents n=226, brand/advertiser respondents n=60).

05.
objectives for PDOOH advertising.

objectives for programmatic DOOH advertising.

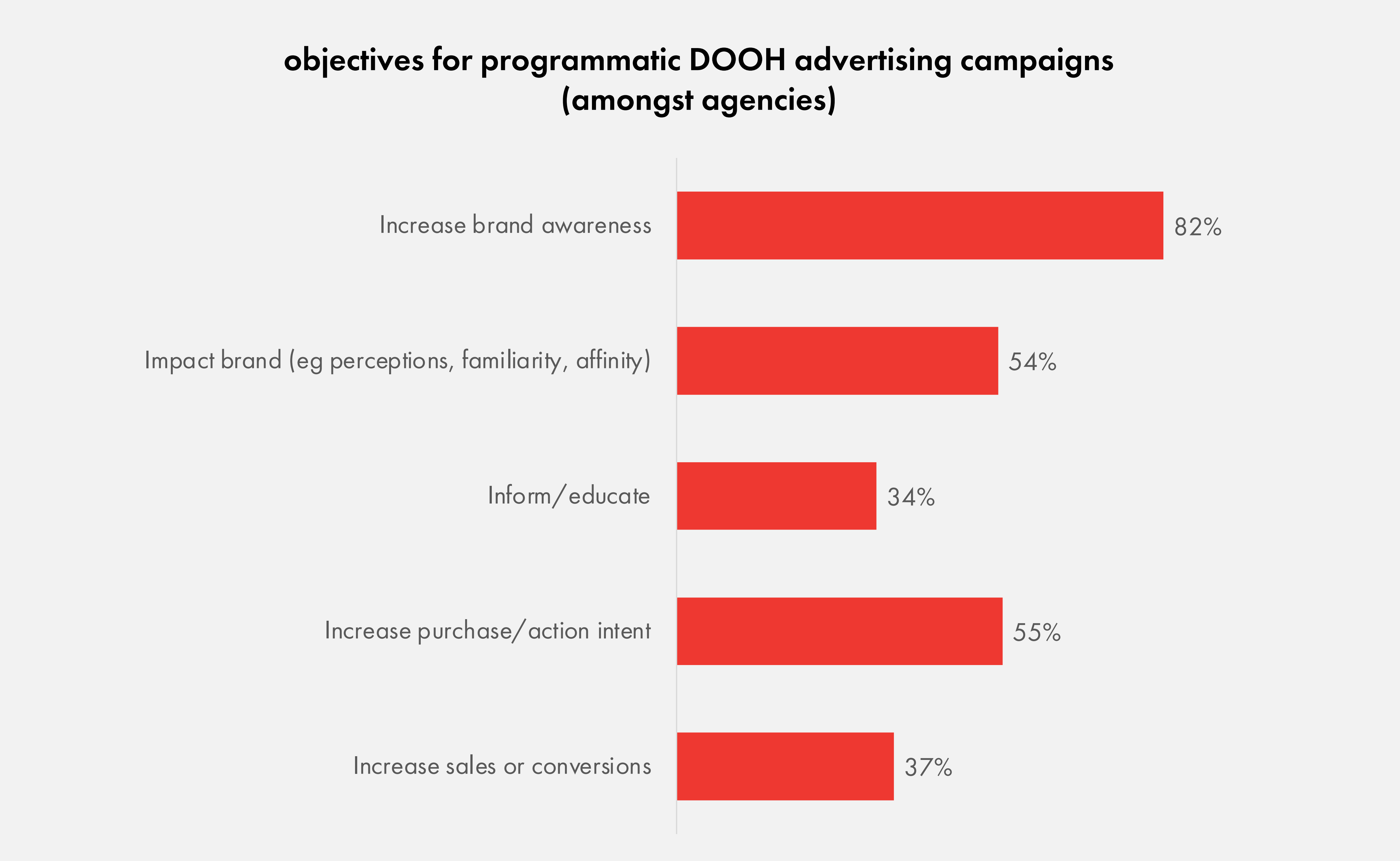
Increasing brand awareness remains the predominant objective for programmatic digital out-of-home advertising amongst agencies over the last year, as it has been for previous survey waves.

82% of agencies have used programmatic digital out-of-home advertising to increase brand awareness over the last year.

Agencies are using programmatic digital out-of-home for a range of objectives, with 55% of agencies also using it to increase purchase or action intent.

Independent agencies have a higher propensity to use programmatic digital out-of-home for increasing purchase intent and sales.

In 2024 this question has been aligned to other IAB industry surveys for comparison to other digital formats.



Q- What have been the objectives of the programmatic digital out-of-home advertising activities you've been involved with over the past year? (Please select all that apply) Base all agency respondents n=226

objectives for buying programmatic DOOH.

Increasing sales and conversions is the dominant objective for programmatic digital out-of-home amongst brands and advertisers surveyed, followed by increasing brand awareness.

Like agencies, brands and advertisers are using programmatic digital out-of-home for a range of objectives across the funnel.

Note the small sample size of brands and advertisers.

top objectives for buying programmatic DOOH

amongst agencies	
Increase brand awareness	82%
Increase purchase/action intent	55%
Impact other brand metrics	54%

amongst brands/advertisers	
Increase sales/conversions	53%
Increase brand awareness	48%
Inform/educate	43%

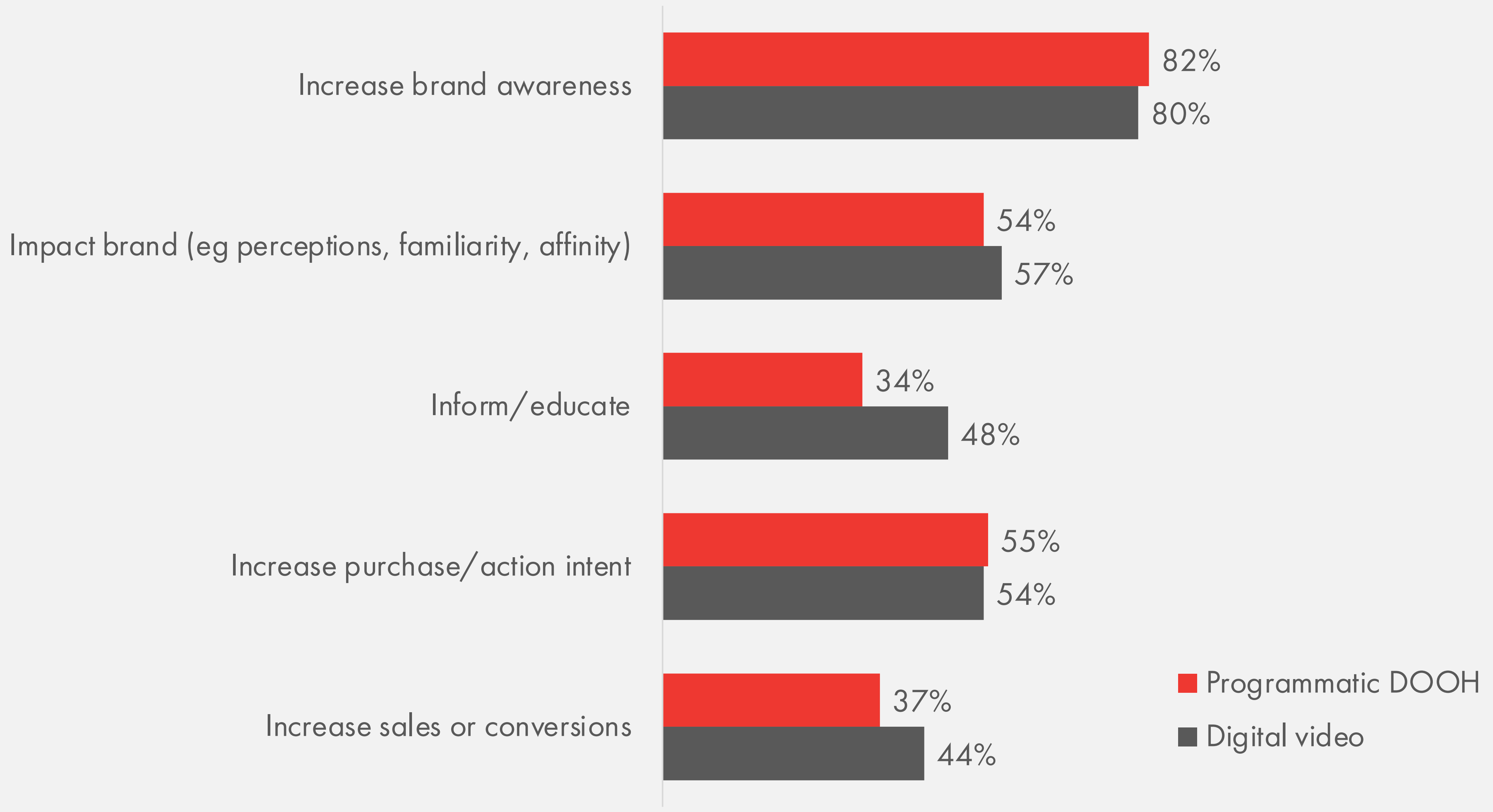
Q- What have been the objectives of the programmatic digital out-of-home advertising activities you've been involved with over the past year? (Please select all that apply) Agency respondents n=226, brand/advertiser respondents n=60.

objectives for programmatic DOOH advertising.

Amongst agencies, the objectives for programmatic DOOH and digital video campaigns are very similar.

In 2024 this question has been aligned to other IAB industry surveys for comparison to other digital formats. The usage of programmatic DOOH for increasing brand awareness is at similar levels to usage of streaming audio (87% for brand) and digital video (80% for brand). Conversely retail media is predominantly being used for driving sales (88%).

objectives for programmatic DOOH v digital video advertising campaigns (amongst agencies)



Q- What have been the objectives of the programmatic digital out-of-home advertising activities you've been involved with over the past year? (Please select all that apply) Base all agency respondents n=226
IAB Australia Video Advertising State of the Nation 2023 conducted by Hoop Insights & Strategy (advertising and agency decision makers, n=133). Q - What have been the objectives of the Digital Video advertising on LinearTV/Connected TV/Digital Video on computer or mobile you've been involved with over the past year?

06.

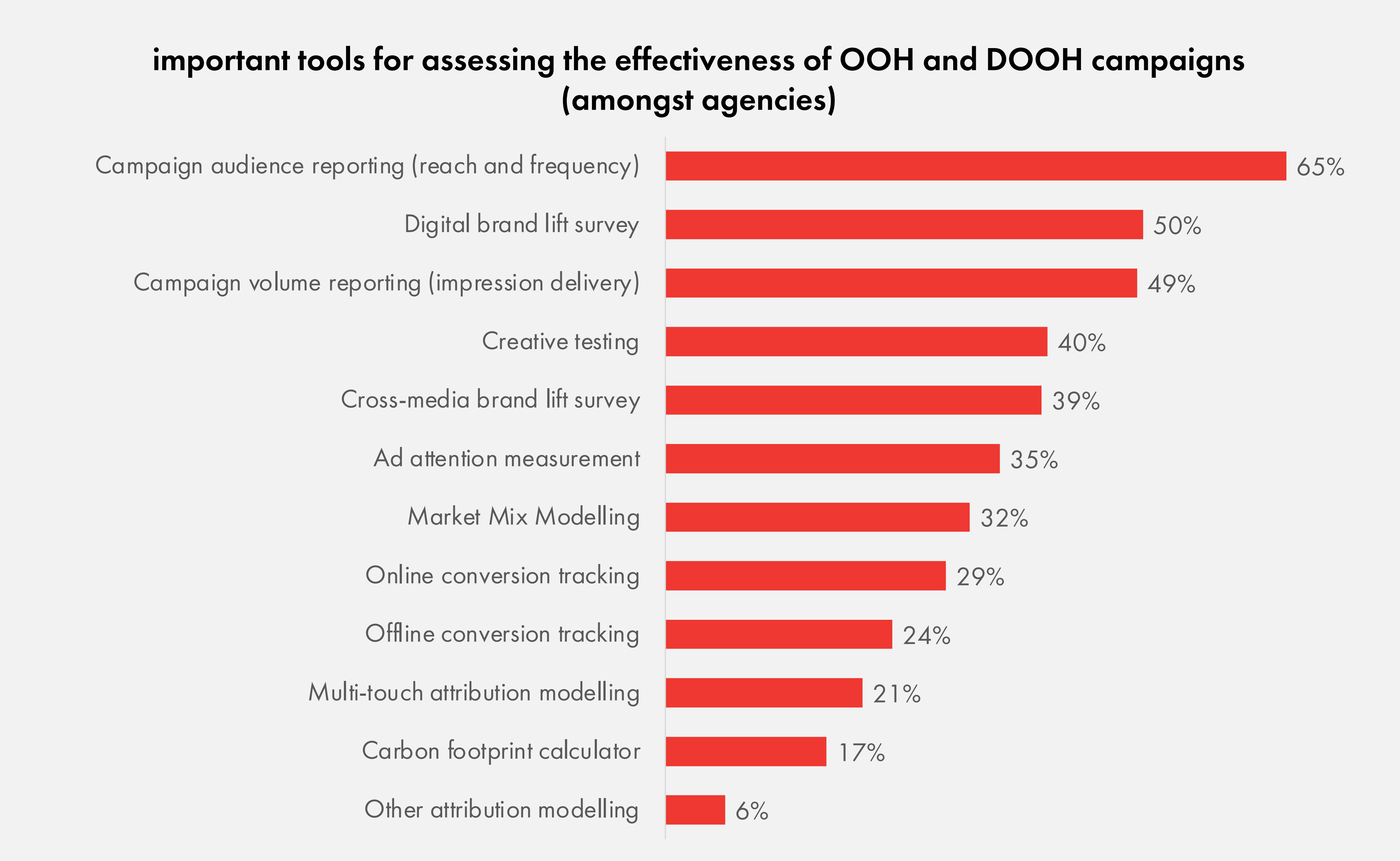
measuring PDOOH ad effectiveness.

important measurement tools to assess ad effectiveness.

Campaign audience reporting (reach and frequency) is rated as the most important measurement tool for assessing effectiveness of OOH and DOOH advertising (65% of agency respondents).

Aligned with the predominant objective of brand building, digital brand lift is an important measurement tool for 50% of agencies and cross-media brand lift is an important tool for 39% of agencies.

This is a new question for the survey this year and has been aligned to other IAB industry surveys for comparison to other digital formats.



Q- When assessing the effectiveness of your out-of-home and digital out-of-home advertising investment, which of the following measurement tools are important to you? (select all that apply) Base all agency respondents n=226

important measurement tools to assess ad effectiveness.

When assess digital video ad effectiveness, agencies rate measurement tools that assess effectiveness in the context of other media channels (such as MMM and cross-screen brand lift) as more important than they do when assessing OOH and digital OOH.

More agencies rate creative testing as important for OOH/DOOH than they do for digital video.

top 3 most important ad effectiveness measurement tool (amongst agencies)

OOH and Digital OOH		Digital video (incl CTV)	
Campaign audience reporting	65%	Campaign volume reporting	60%
Digital brand lift	50%	Market Mix Modelling	45%
Campaign volume reporting	49%	Cross-screen brand lift	45%

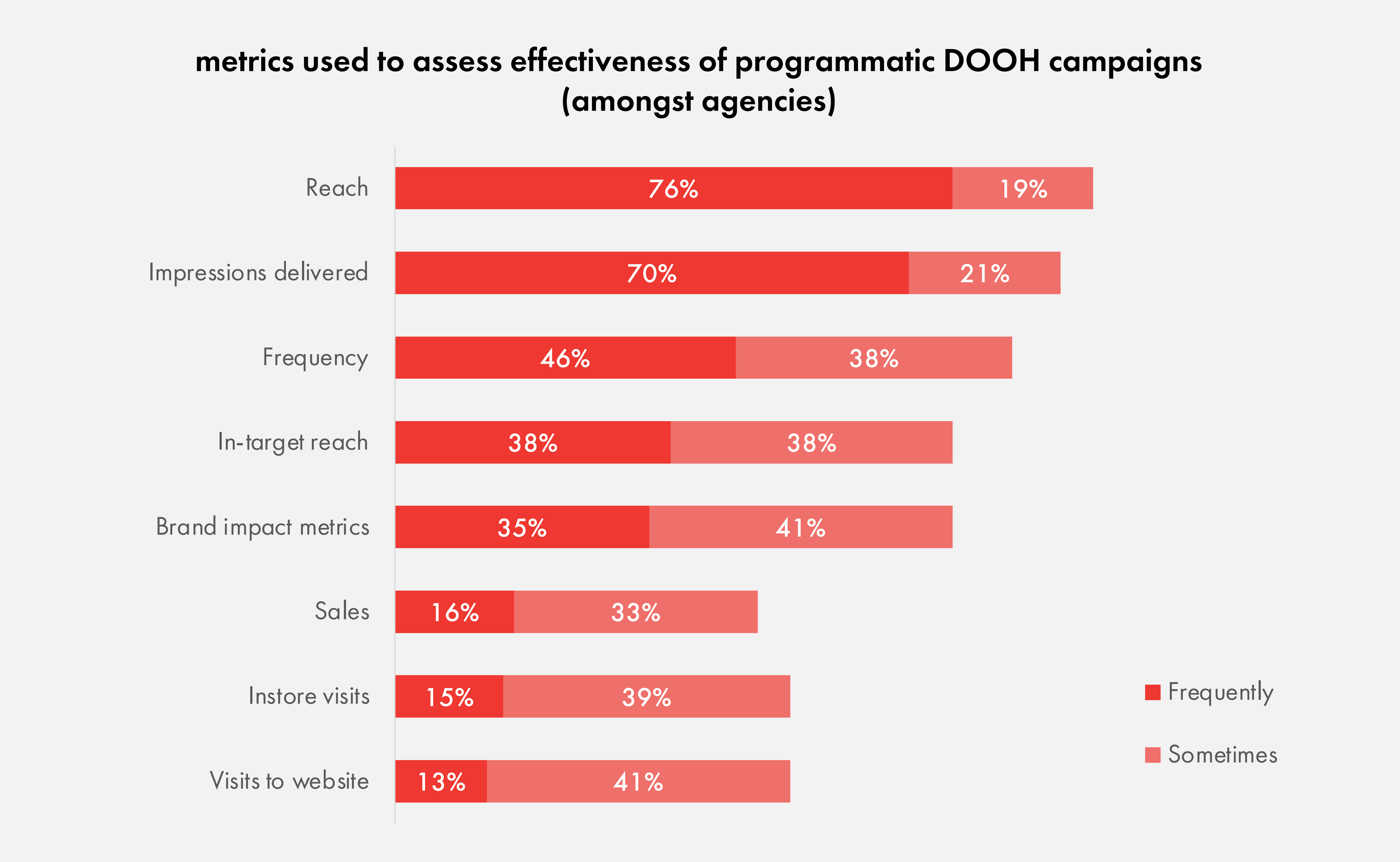
Q- What have been the objectives of the programmatic digital out-of-home advertising activities you've been involved with over the past year? (Please select all that apply) Agency respondents n=226, brand/advertiser respondents n=60. Source; IAB Australia Video Advertising State of the Nation 2023 conducted by Hoop Insights & Strategy (advertising and agency decision makers, n=133). Q -When assessing the effectiveness of your Digital Video advertising investment (on Connected TV, computer or mobile), which of the following measurement tools are important to you? Please select as many as appropriate

metrics used to assess programmatic DOOH ad effectiveness.

Ad delivery metrics (reach & frequency and impressions) are the most used metrics amongst agencies to assess effectiveness of programmatic DOOH campaigns.

Increasing brand awareness remains the predominant objective for programmatic digital out-of-home amongst agencies and 76% are at least sometimes using brand impact metrics to assess effectiveness.

Brands and advertisers surveyed prioritised increasing sales and conversions as their dominant objective for programmatic DOOH, however only half are at least sometimes using sales metrics to assess campaign effectiveness.



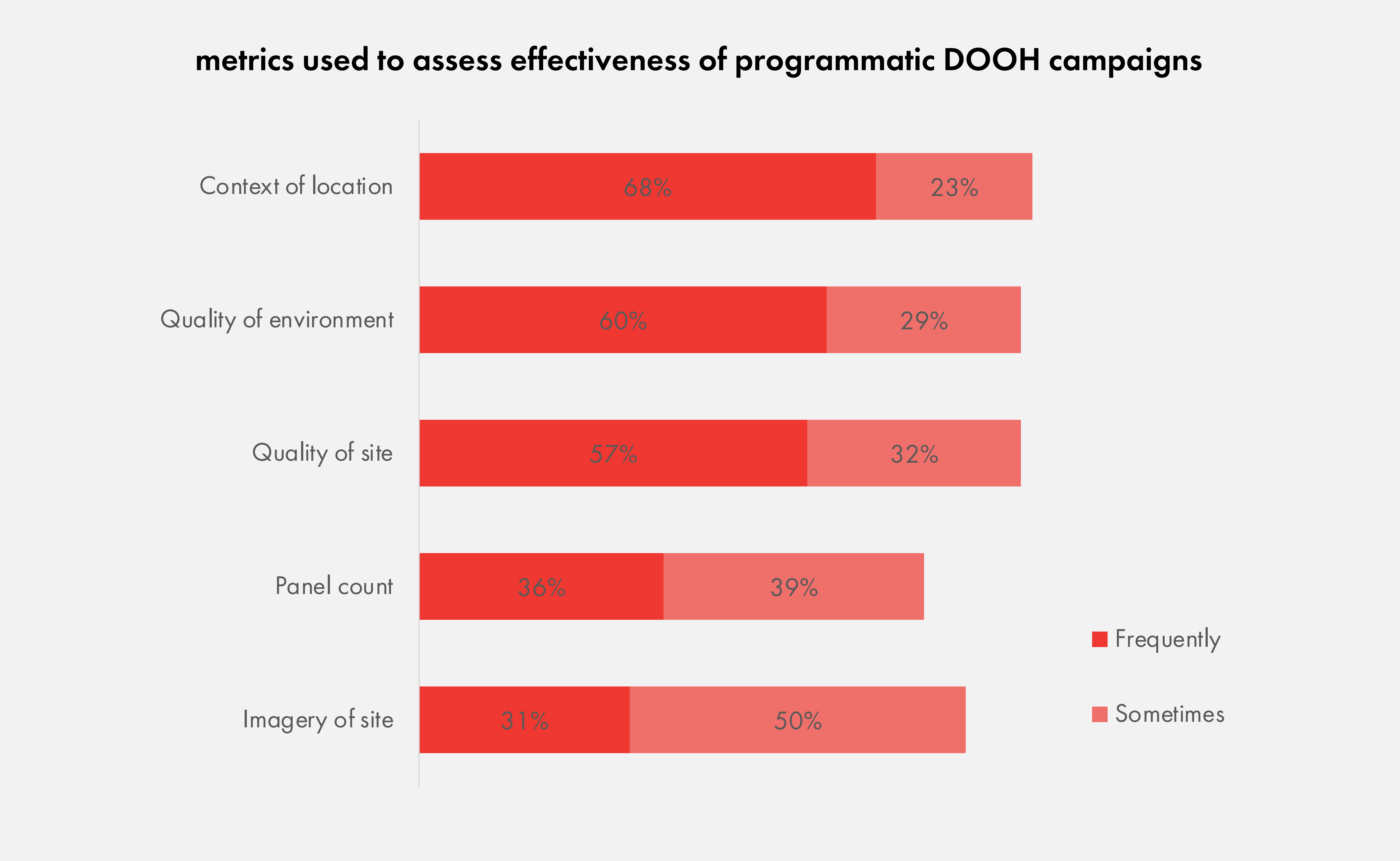
Q- How often are you using the following metrics to assess effectiveness of your programmatic digital out-of-home campaigns?) Base all agency respondents n=226

classic OOH buying metrics considered when using programmatic DOOH.

Context of location is a frequently used traditional OOH metric considered when using programmatic digital OOH advertising.

Contextual relevance of placements is one of the key drivers for usage of programmatic DOOH advertising and 91% are at least sometimes using context of location metrics when considering programmatic DOOH advertising.

89% are also at least sometimes considering quality of environment and quality of site metrics when using programmatic DOOH advertising.



Q- How often do you consider the following classic out-of-home buying metrics when using programmatic digital out-of-home advertising? Base all respondents n=286

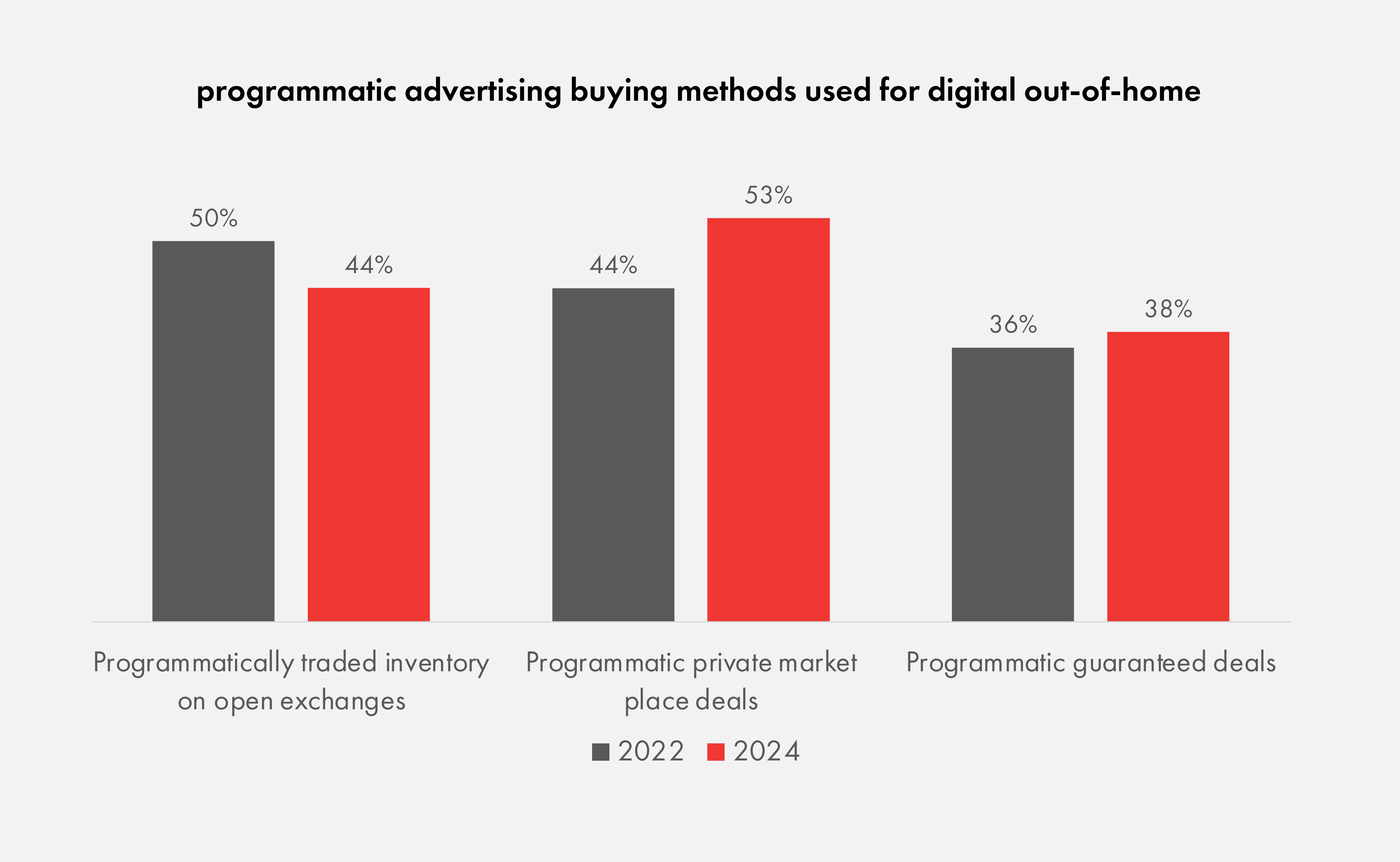
07.

planning and buying PDOOH.

programmatic buying methods for DOOH advertising.

Agencies and brands are using a combination of programmatic buying methods for DOOH.

Private market places are now the most common way to buy programmatic digital out-of-home advertising for both agencies and brands. This has changed since the 2022 survey when the most common way to buy programmatically was on open exchanges.



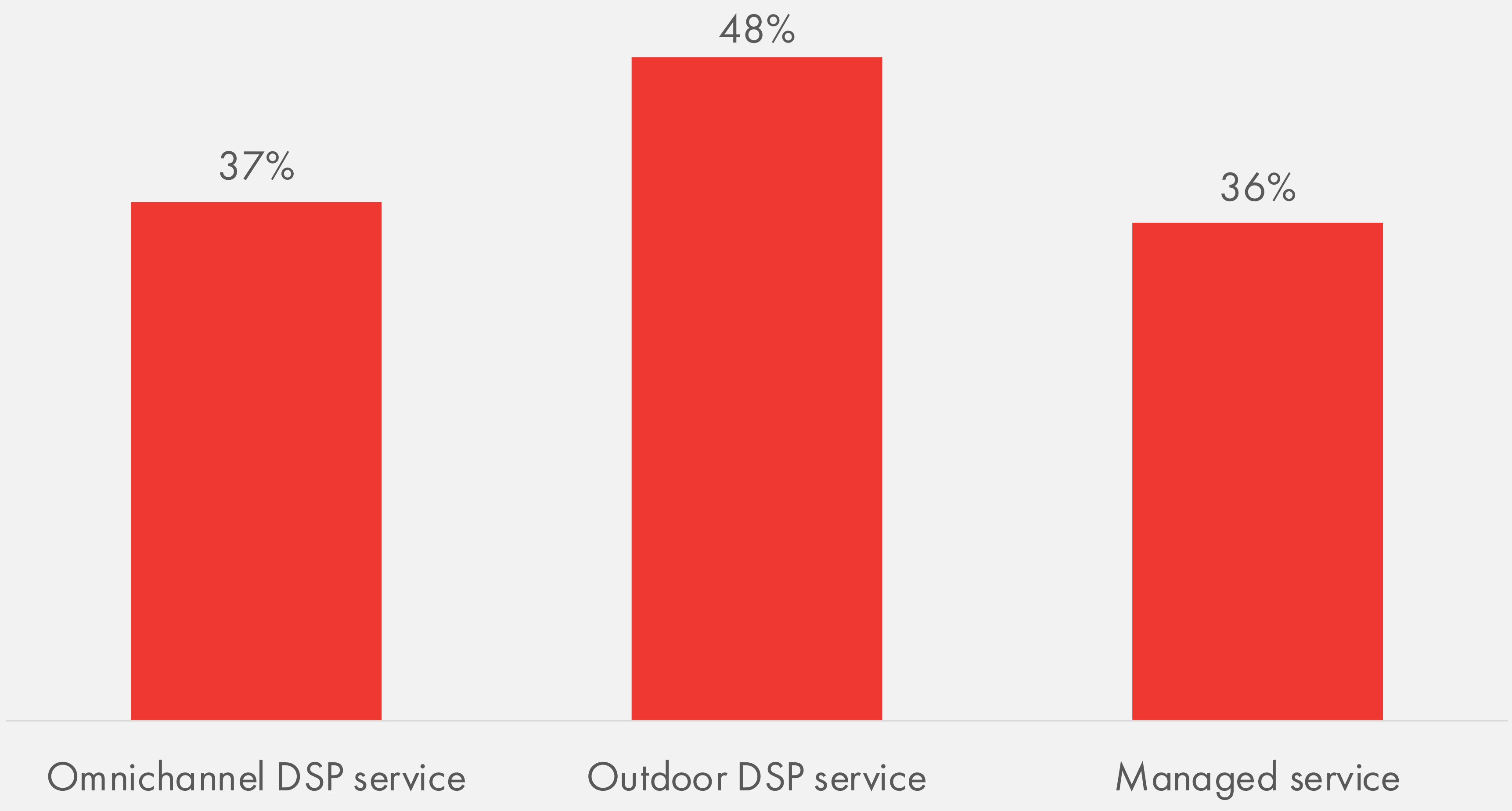
Q- Which of the following programmatic advertising buying methods have you used for digital out-of-home? (Select all that apply)? Base all respondents n=286

services used to buy programmatic DOOH advertising.

Agencies and brands are typically using a combination of services to buy programmatic digital out-of-home advertising.

Buying through a specialised outdoor advertising DSP service is the most common way to purchase programmatically for both agencies and brands.

This question was included in the survey for the first time in 2024.



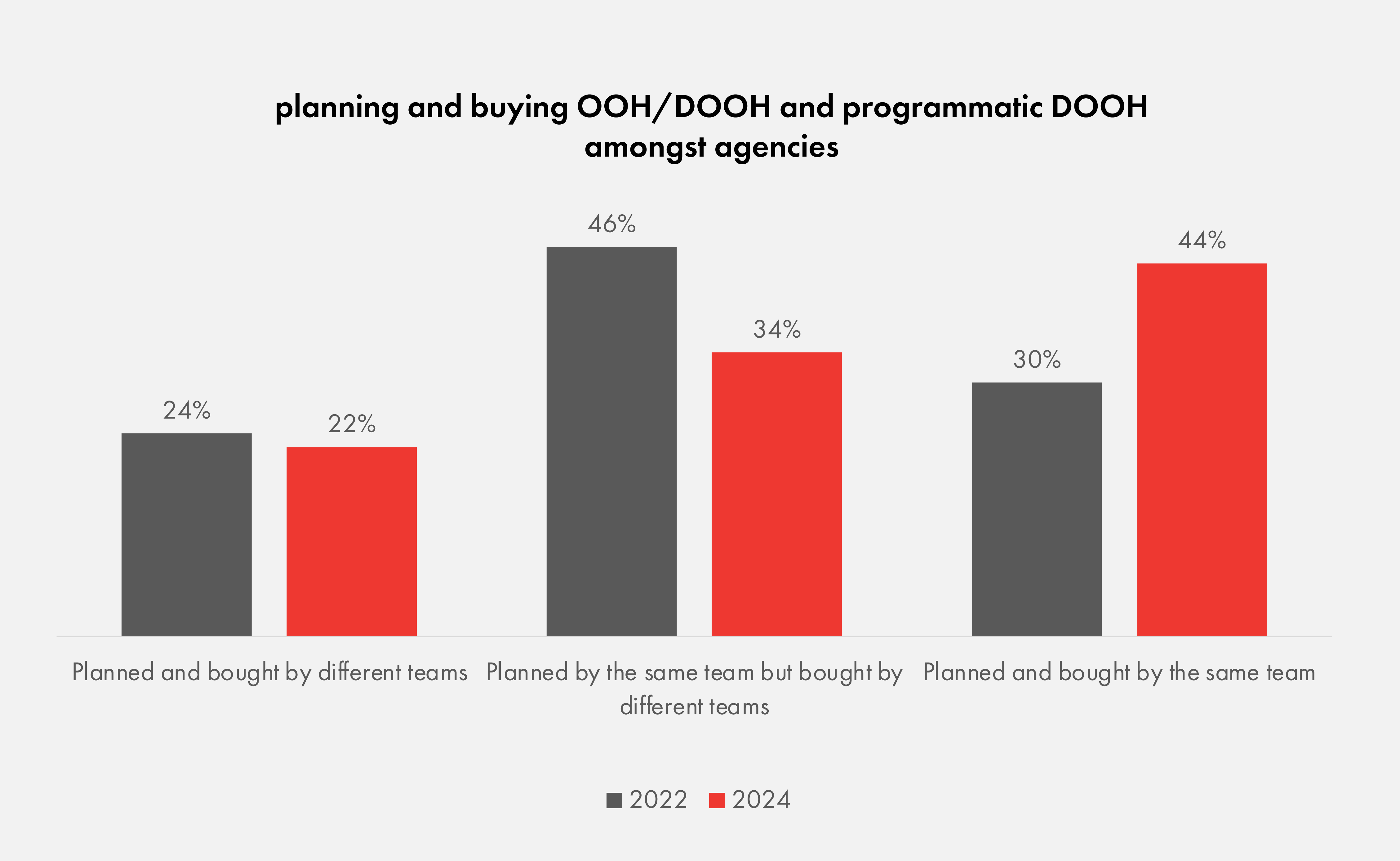
Q- Through which services do you typically buy programmatic digital out-of-home advertising? (Select all that apply) Base all respondents n=286

planning and buying OOH advertising amongst agencies.

8 in 10 agencies (78%) plan activities for OOH/DOOH and programmatic DOOH within the same agency team.

44% of agencies are now planning AND buying OOH, DOOH, programmatic DOOH within the same agency team.

Over the last 3 years there has been a shift from agencies just planning OOH/DOOH and programmatic DOOH within the same agency team to more agencies planning AND buying within the same agency team. While the proportion of agencies planning and buying in different teams has remained similar over the last 3 years.



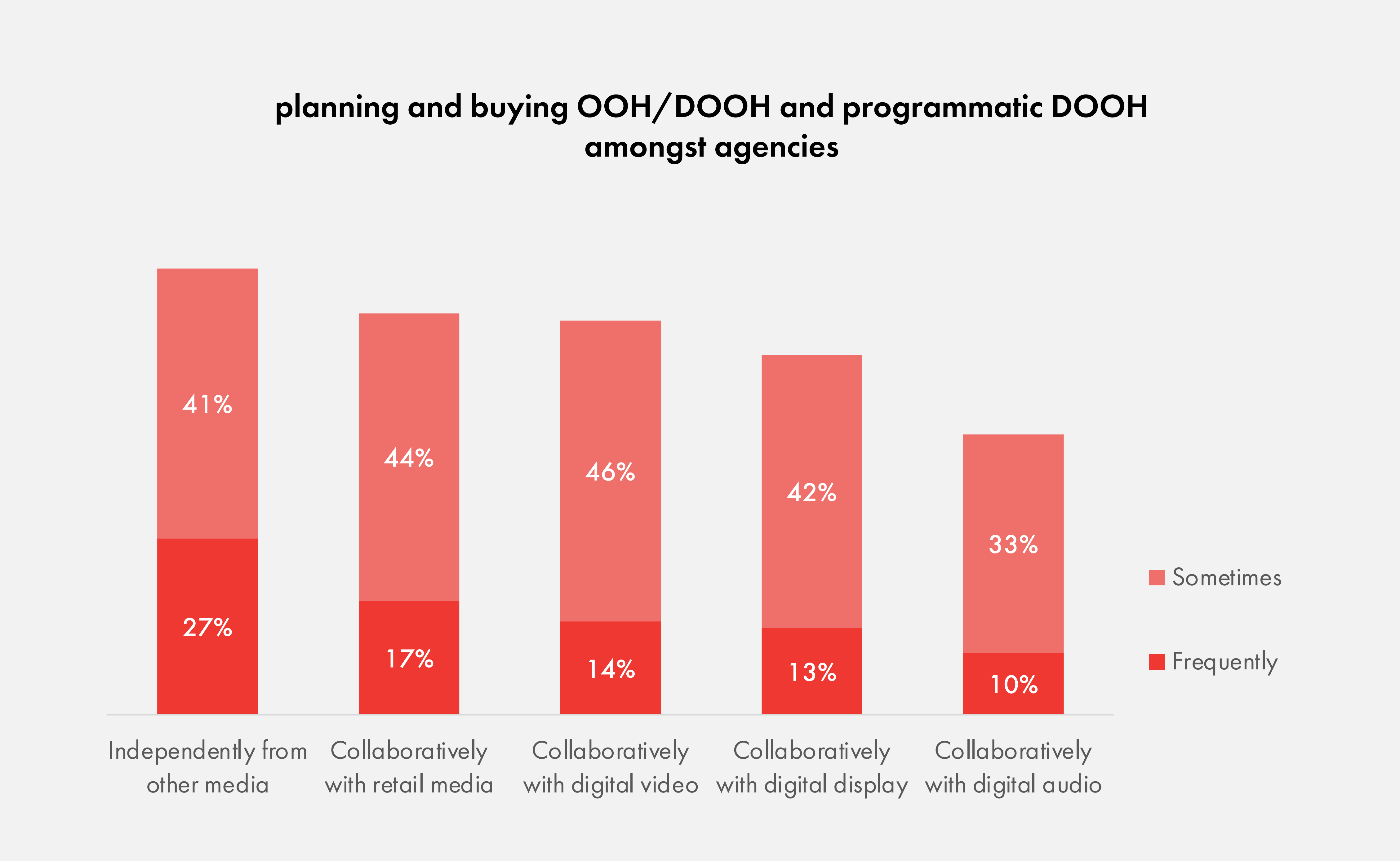
Q- How does your agency plan and buy programmatic digital out-of-home advertising? Base agency respondents n=226

planning and buying programmatic DOOH advertising with other digital advertising.

Similar to 2022, programmatic digital out-of-home advertising is more often planned and bought independently of other media but also at other times planned and bought together with other media.

Programmatic digital out-of-home is most frequently bought independently from other media (as it was in 2022).

However, it is sometimes planned and bought collaboratively with retail media (61% of respondents frequently/sometimes do) and collaboratively with digital video (60% of respondents frequently/sometimes).

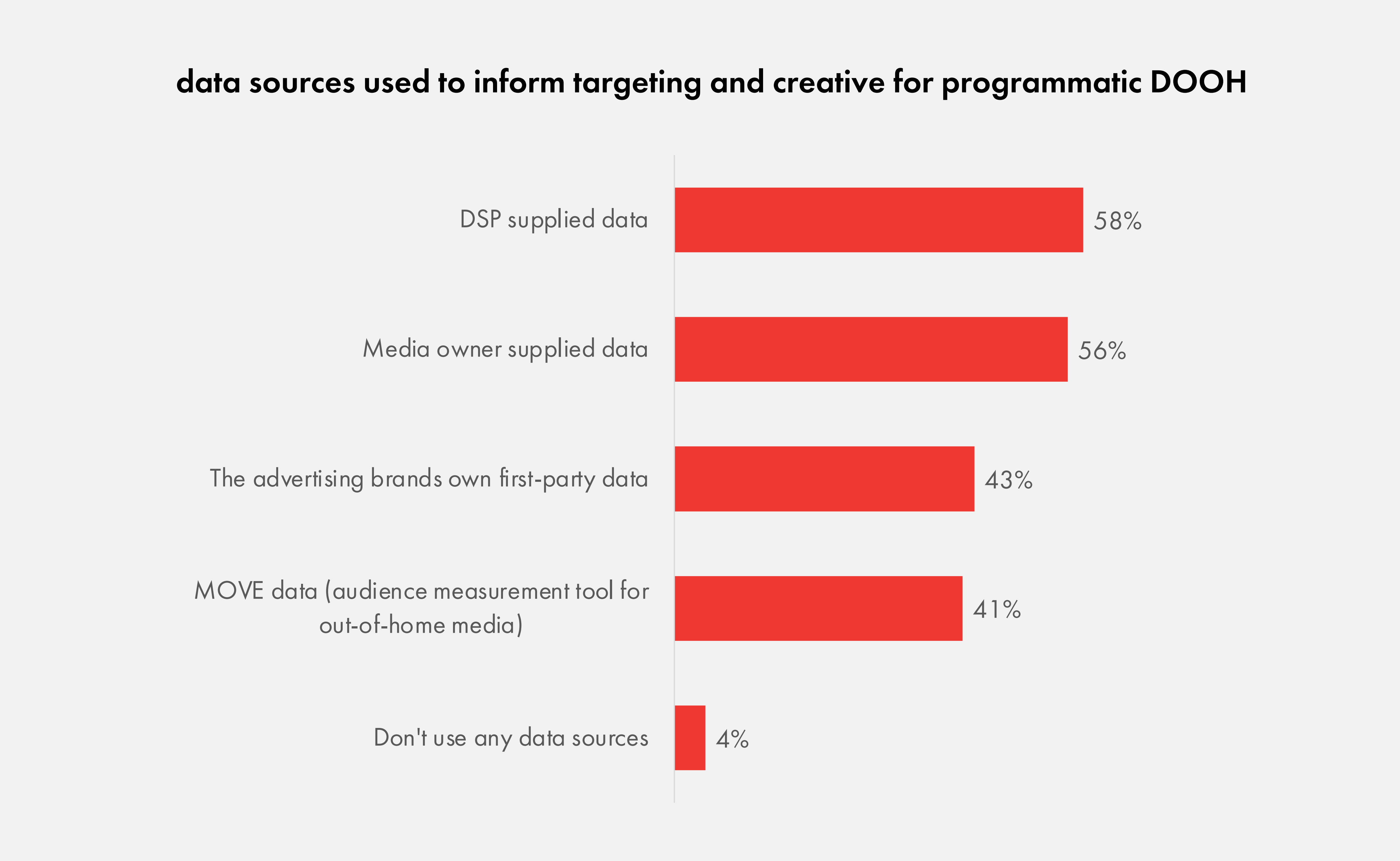


Q- When buying programmatic digital out-of-home which of the following best describes where it typically fits into your campaign plan? Base all respondents n=286

data sources used in programmatic DOOH.

There are a range of data sources being used to inform targeting and creative for programmatic DOOH.

DSP supplied data and media owner supplied data are commonly used.



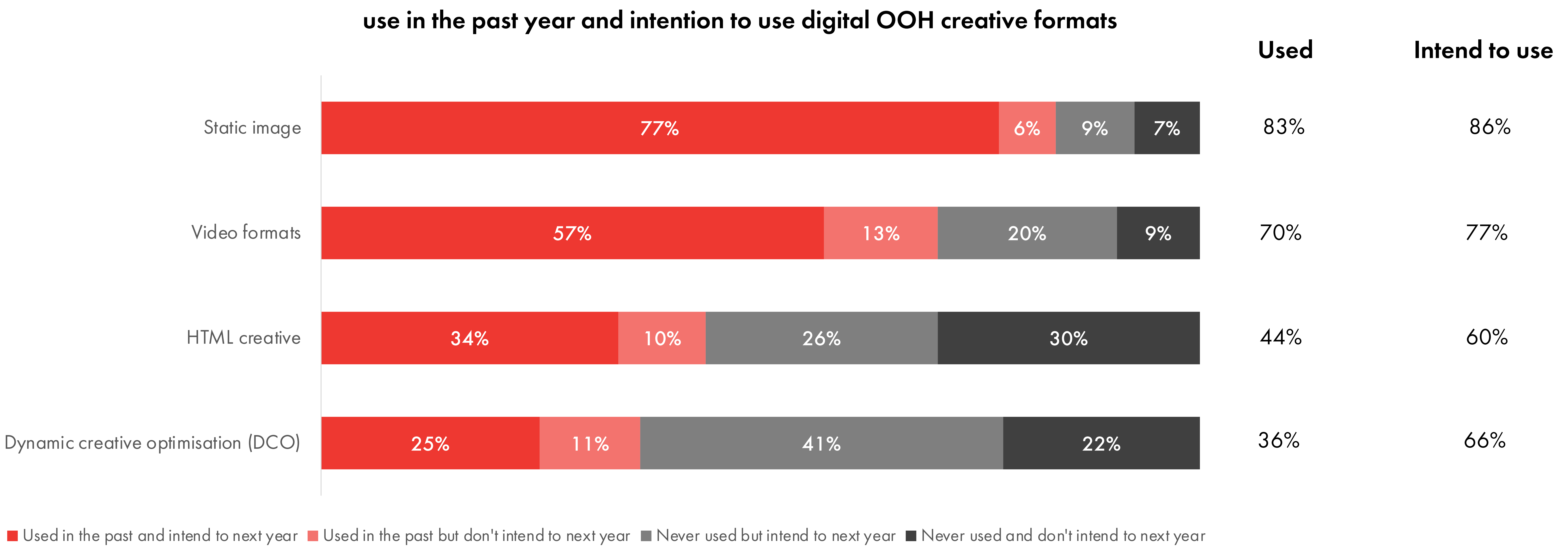
Q- Which of the following data sources is your company/client using to inform targeting and creative for programmatic digital out-of-home advertising (Select all that apply) Base all respondents n=286

08.

usage of DOOH creative formats.

usage of digital OOH creative formats.

Static image and video format creative continue to be the most used formats for digital OOH advertising. There is potential for future growth in usage of HTML and DCO based on intentions to use in the next year, for example 41% of respondents who have never used DCO in the past intend to in the next year. Compared to the previous survey, usage of static and video formats have increased, however high intentions to use HTML and DCO have not converted to higher usage this year.



Q- Which of the following creative formats have you used or plan to use for digital out-of-home advertising? Base all respondents n=286

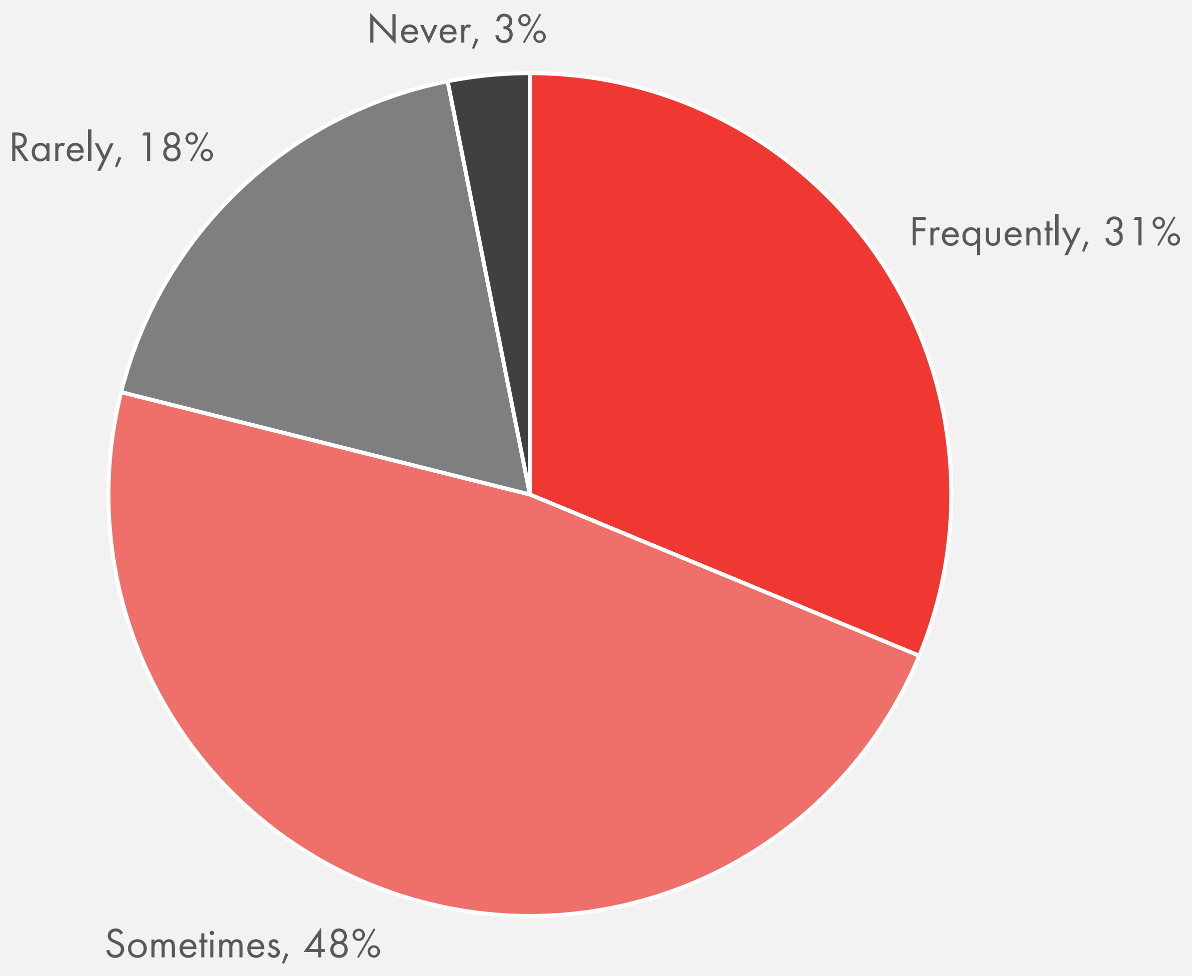
adjusting creative to suit the viewing environment.

8 in 10 (79%) of agencies at least sometimes adapt DOOH ad creative to suit the viewing environment, this has increased from 70% in 2022.

Due to the varied formats available for DOOH advertising there is high frequency of adjusting creative for the relevant environment, however 21% of agency respondents rarely or never do this.

Creative quality is the most important driver for digital advertising effectiveness, so its worth putting the effort in to produce fit for environment creative.

frequency creative is adapted to suit DOOH viewing environments (amongst agencies)



Q- When running campaigns across omni programmatic channels (eg including display, video, mobile), how often is the creative adapted to suit digital out-of home (OOH) in consideration of the relevant viewing environment?
Base agency respondents n=226

09.

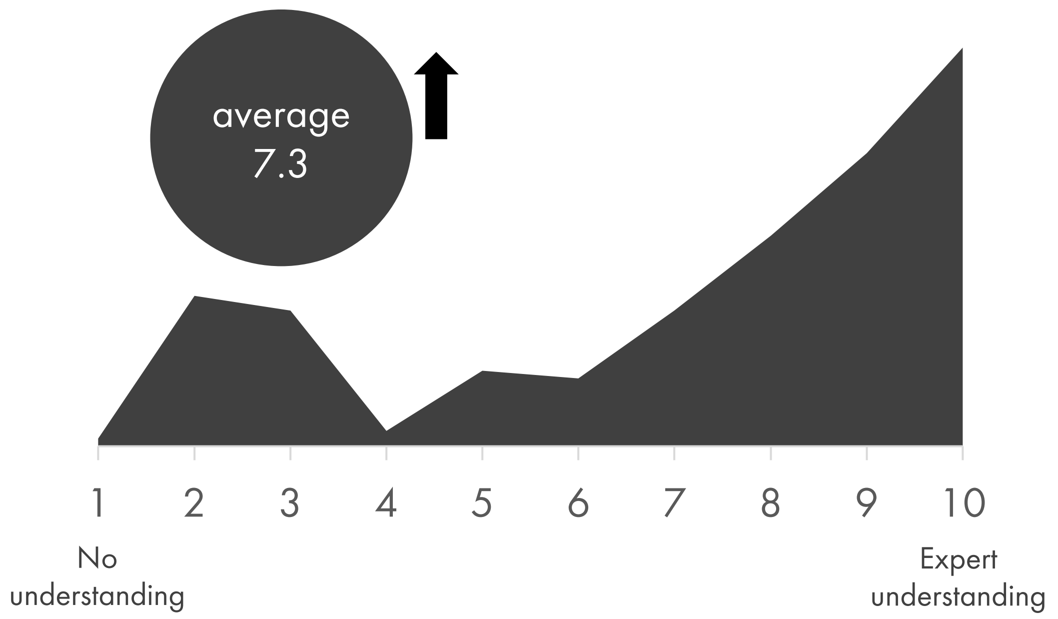
opportunities for growth.

understanding of OOH advertising.

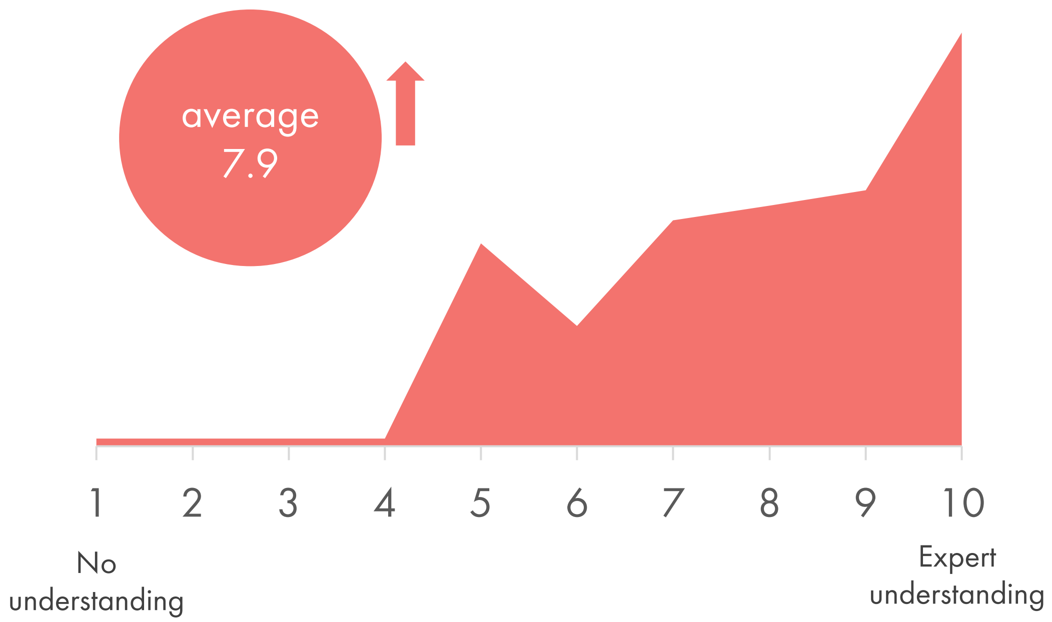
Understanding of programmatic digital out-of-home advertising remains lower than the understand of classic and digital out-of-home advertising and lack of understanding continues to be the biggest issue preventing programmatic digital out-of-home advertising from being a larger proportion of advertising volume, however average levels of understanding across all forms of out-of-home advertising have increased since the last survey.

understanding of the forms of out-of-home advertising

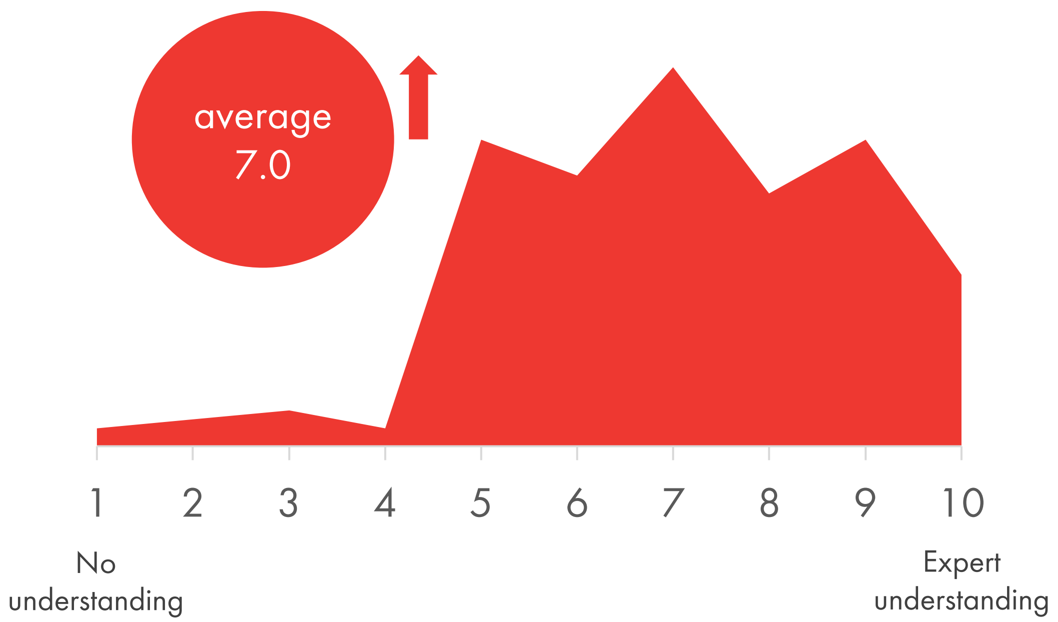
static/classic out-of-home



digital out-of-home



programmatic digital out-of-home



iab. australia

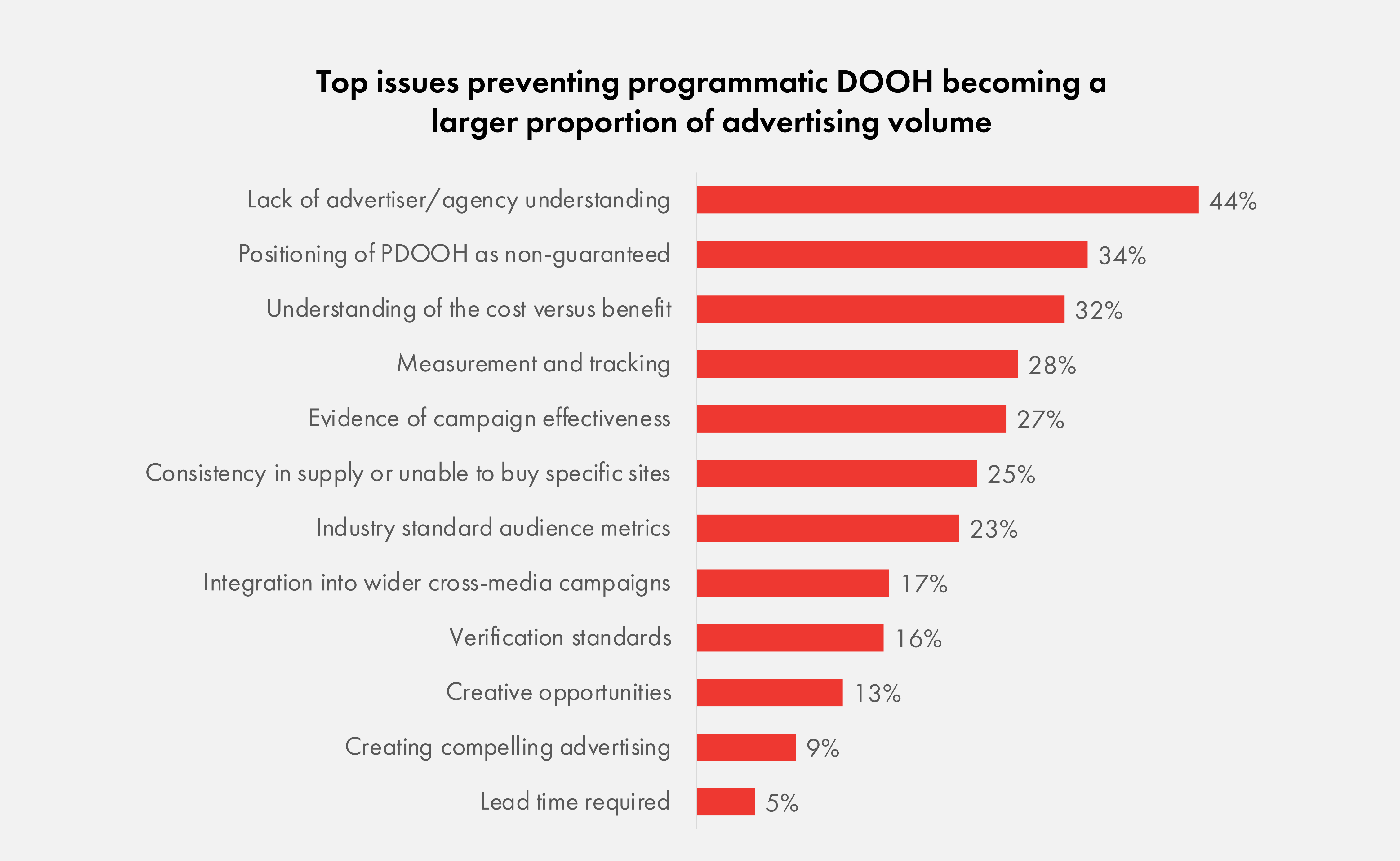
Q- Please rate how well you feel you understand the following forms of out-of-home advertising, where 1 means no understanding at all and 10 means an expert level of understanding? Base all respondents n=286

opportunities for growth of programmatic DOOH.

Although understanding of programmatic digital out-of-home advertising has improved since the last survey, it remains lower than the understand of classic and digital out-of-home advertising and continues to be the biggest issue preventing programmatic digital out-of-home advertising from being a larger proportion of advertising volume.

Positioning of programmatic digital out-of-home as non-guaranteed also continues to be an important issue preventing programmatic digital out-of-home being a larger proportion of ad volume.

Similar to OOH and digital OOH advertising, understanding the cost versus benefit, evidence of effectiveness, along with measurement and tracking are industry challenges.



Q - What are the three biggest issues preventing programmatic digital out-of-home advertising from being a larger proportion of advertising volume? (Select up to 3 issues) Base all respondents n=286

opportunities for growth of OOH advertising forms.

Measurement/tracking, evidence of campaign effectiveness and understanding cost versus benefit of advertising are common opportunities across the different forms of out-of-home advertising. Lead time required is a unique barrier to classic out-of-home (48% of respondents selected as a top 3 issue), evidence of campaign effectiveness was top issue for digital out-of-home (36% of respondents selected as top 3 issue) and lack of understanding is a unique barrier for programmatic (44% of respondents selected as a top 3 issue).

top 3 issues preventing OOH advertising forms becoming a larger proportion of advertising volume

static/classic out-of-home

1. Lead time required.
2. Measurement and tracking.
3. Evidence of campaign effectiveness.

digital out-of-home

1. Evidence of campaign effectiveness.
2. Measurement and tracking.

=3. Integration into wider cross-media campaigns. Consistency in supply or unable to buy specific sites. Understanding of the cost versus benefit.

programmatic digital out-of-home

1. Lack of advertiser/agency understanding.
2. Positioning of PDOOH as non-guaranteed.
3. Understanding of the cost versus benefit.

iab. australia

Q-What are the three biggest issues preventing static/classic out-of-home/digital out-of-home/ programmatic digital out-of-home advertising from being a larger proportion of advertising volume? (Select up to 3 issues) Base all respondents n=286

learn more about programmatic DOOH.