

attitudes to programmatics

July 2021

dooh.

iab.
australia

iab digital out of home working group

The IAB thanks the following organisations for their support in this study.

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introduction

This research and report has been prepared by the IAB Australia DOOH Working Group to help the local market understand the state of play for programmatic DOOH media trading in Australia as well the needs of buyers as the market develops.

The majority of the information in this report is from agency leaders who have had some experience with trading DOOH inventory programmatically so will not be representative of the whole market but provides the industry with deep information from practitioners with an understanding of market needs, opportunities and barriers.

The study provides vital information on:

- **Industry benchmarks on usage and adoption**
- **Marketing objectives of pDOOH**
- **Metrics being used to assess pDOOH activity**
- **Prioritisation for the development of industry standards, resources and education**

This study will be conducted every 12 months to track the progress and changing needs of the programmatic DOOH industry.

methodology

The programmatic Digital Out-of-Home State of the Nation Survey was carried out in:

MAY 2021

183

survey respondents

139

respondents had used
Programmatic DOOH
advertising

Respondent Job Role:

Responsible for, or influence, **advertising decisions**

Experience with at least one form of **out of home advertising**

From:

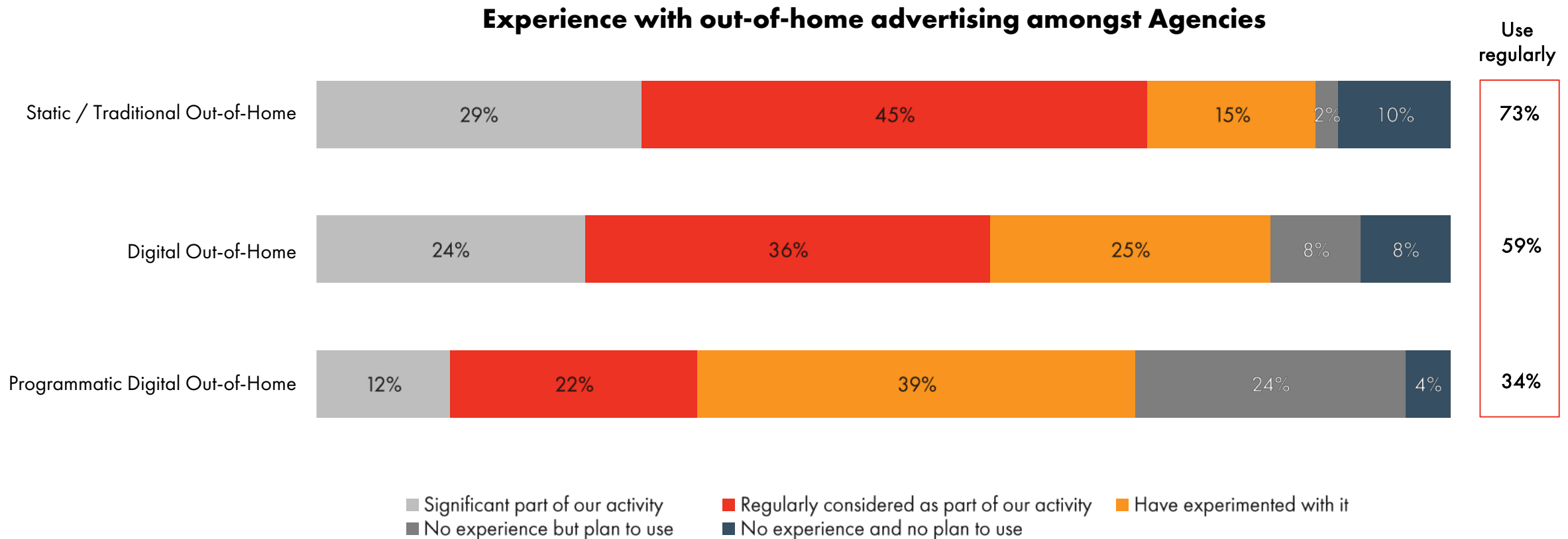
Agencies
Trading desks
Brands/advertisers
Ad tech suppliers

executive summary

- There are a range of factors driving consideration of programmatic DOOH usage, equally flexible buying options, operational efficiency, enhanced reach and data & targeting. **Flexible buying options stand out as a key driver of usage amongst ad agencies.**
- **Impacting brand awareness is the #1 objective of pDOOH advertising,** followed by incremental reach. Despite brand awareness being the key objective, reach is more often used as a measure of campaign success than brand metrics.
- There is evidence of lack of integration of pDOOH with other advertising activities. Agencies are working out where pDOOH sits internally across planning and buying with only 37% using the same team to plan and buy OOH and pDOOH. **Nearly half (49%) of pDOOH decision makers/influencers are always or frequently planning and buying programmatic DOOH independently from other media.**
- There is high usage and intention to use Retail and Roadside (excl billboards) programmatic formats and **strong intention to use Lifestyle, Health and other venues based programmatic formats,** particularly amongst new users.
- Three-quarters (75%) of agencies using pDOOH advertising intend to use video creative formats over the next year.
- Agencies and brands rate their understanding of pDOOH advertising at less than 7 out of 10, where 10 was an expert level of understanding. **Addressing a lack of advertiser and agency understanding is the greatest opportunity** to ensure pDOOH can attract a larger proportion of advertising spend.
- Addressing the lack of measurement – standardised measurement and metrics, audience measurement and evidence of effectiveness – is also a key opportunity for growth of pDOOH advertising.

survey sample: agency experience with pdooh advertising

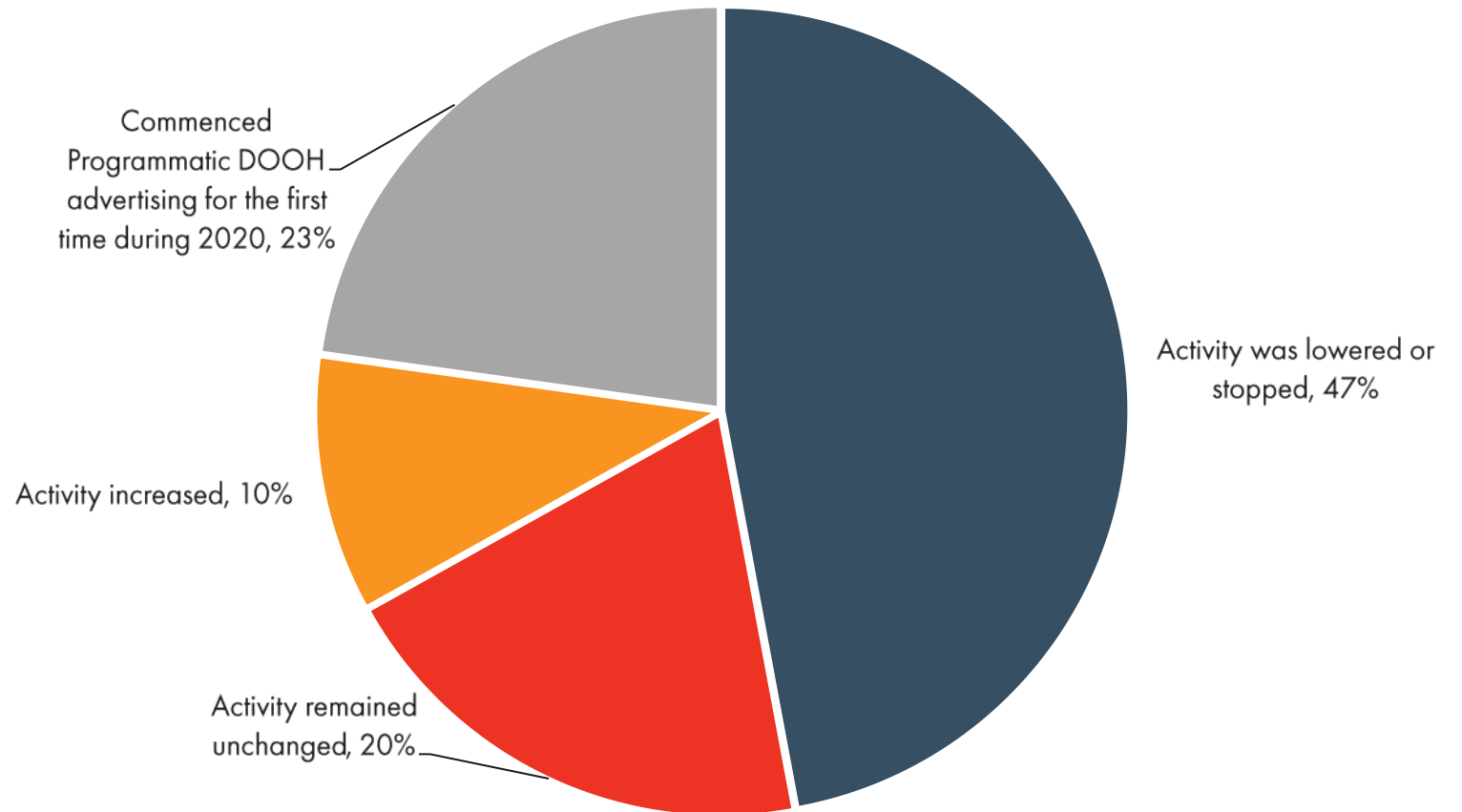
This chart outlines the experience of agency leaders surveyed with programmatic DOOH which will skew to experienced practitioners. 73% of agencies surveyed had used Programmatic Digital Out-of-Home advertising, with 34% saying it is a significant or regular part of their activity. A further 24% currently have no experience with it but intend to use it in the future.



programmatic dooh activity during covid

During COVID-19 impacted 2020, nearly half (47%) of Programmatic DOOH advertising decisions makers/influencers lowered or stopped their Programmatic DOOH advertising activities. For some however, 2020 was a time of experimentation with 23% using Programmatic DOOH for the first time.

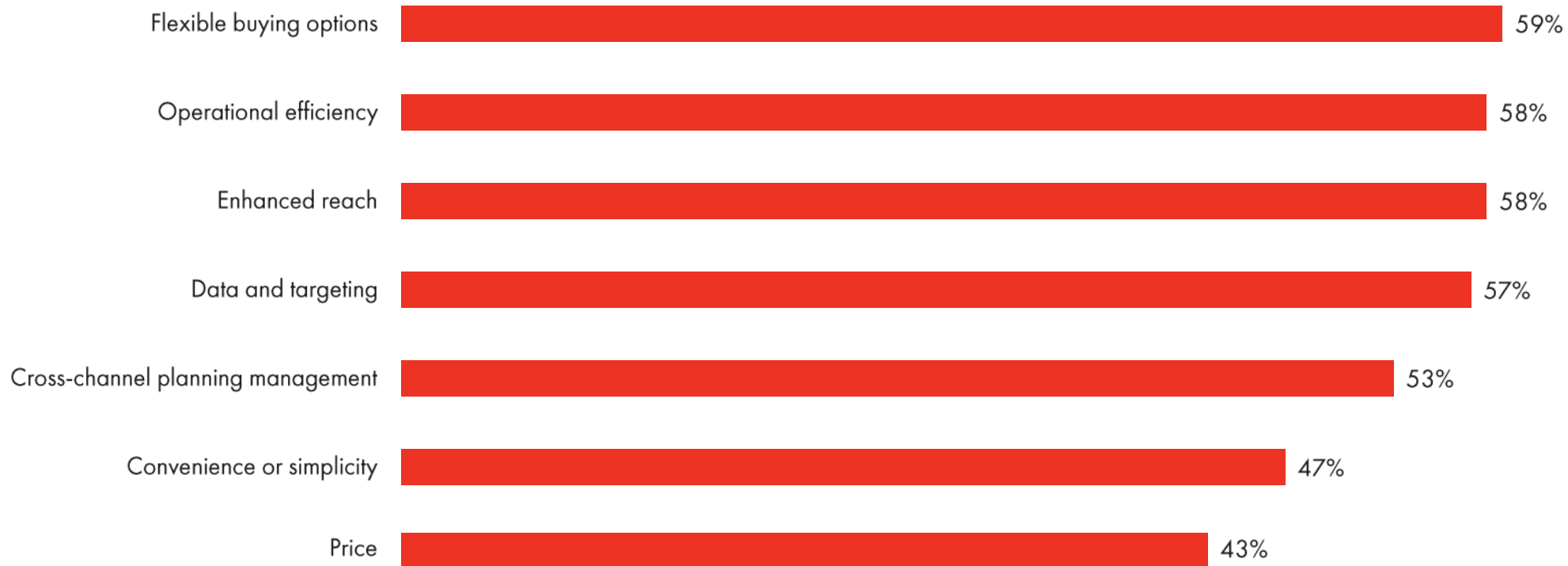
Impact of COVID-19 on programmatic DOOH activities amongst all decision makers/influencers



drivers for buying programmatic dooh

There are a range of factors driving consideration of Programmatic Digital Out-of-Home usage, equally flexible buying options, operational efficiency, enhanced reach and data & targeting.

major factors driving consideration of programmatic digital out-of-home advertising amongst all decision makers/influencers



drivers for buying programmatic dooh

There are a range of factors driving consideration of Programmatic Digital Out-of-Home usage, the top considerations differ slightly across industry groups.

Top 3 major factors driving consideration of programmatic digital out of home advertising

67%

Say flexible buying options are a major reason for considering pDOOH in ad agencies

Amongst Agencies

Flexible buying options	67%
Data & targeting	59%
Operational efficiency	58%

Amongst Brands/Advertisers

Operational efficiency	58%
Enhanced reach	53%
Cross-channel planning	47%
Price	47%

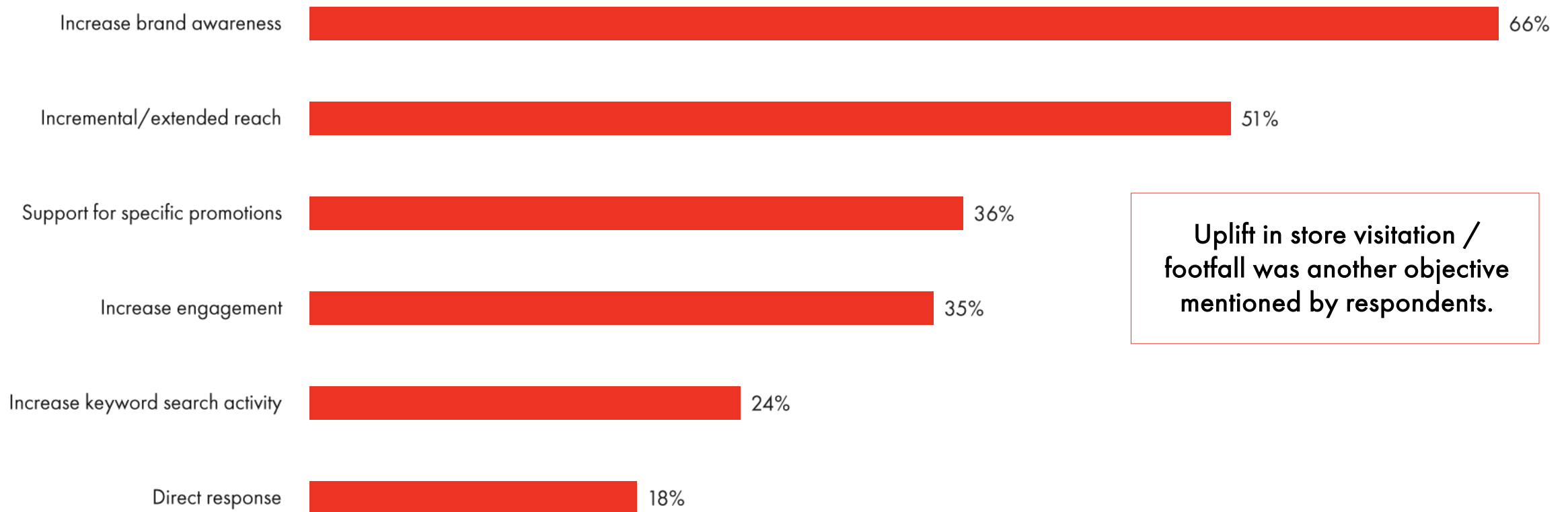
Amongst Ad Tech Suppliers

Cross-channel planning	68%
Enhanced reach	66%
Data & targeting	63%

objectives of programmatic dooh advertising

Impacting brand awareness is the key objective of Programmatic Digital Out-of-Home advertising.

objectives of programmatic digital out of home advertising amongst all decision makers/influencers



objectives of programmatic dooh advertising

There is consensus that impacting brand awareness and incremental/extended reach are both key objectives for Programmatic Digital Out-of-Home advertising across industry groups.

1.

Increase brand awareness

2.

Incremental/
Extended Reach

Objectives of programmatic DOOH advertising

Amongst Agencies

- 1 Increase brand awareness
- 2 Incremental/extended reach
- 3 Support for specific promotions

Amongst Brands/Advertisers

- 1 Incremental/extended reach
- 2 Increase keyword search activity
- 3 Increase brand awareness

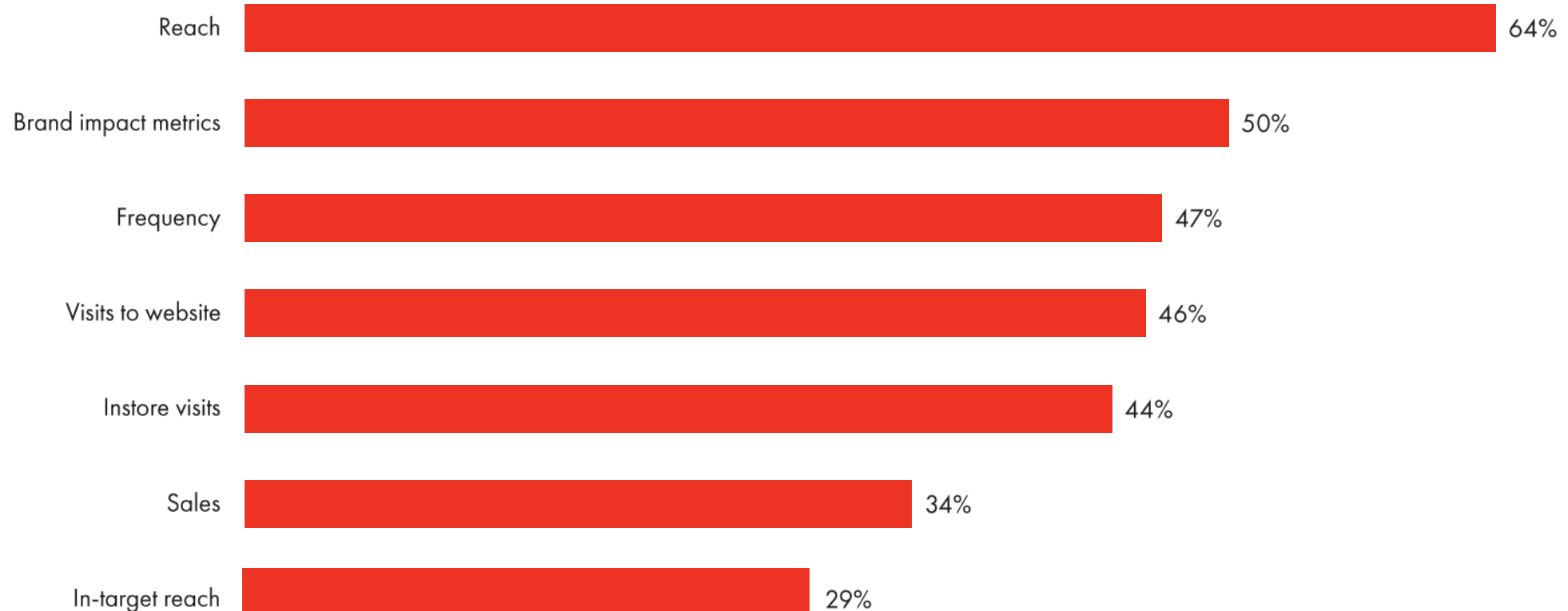
Amongst Ad Tech Suppliers

- 1 Increase brand awareness
- 2 Incremental/extended reach
- 3 Increase engagement

metrics used to assess effectiveness

While the most common objective for Programmatic DOOH campaigns is to increase brand awareness (66%), only half would usually measure brand impact to assess effectiveness. Reach is being used most often to assess effectiveness, possibly as a proxy for brand awareness lift and to assess incremental reach.

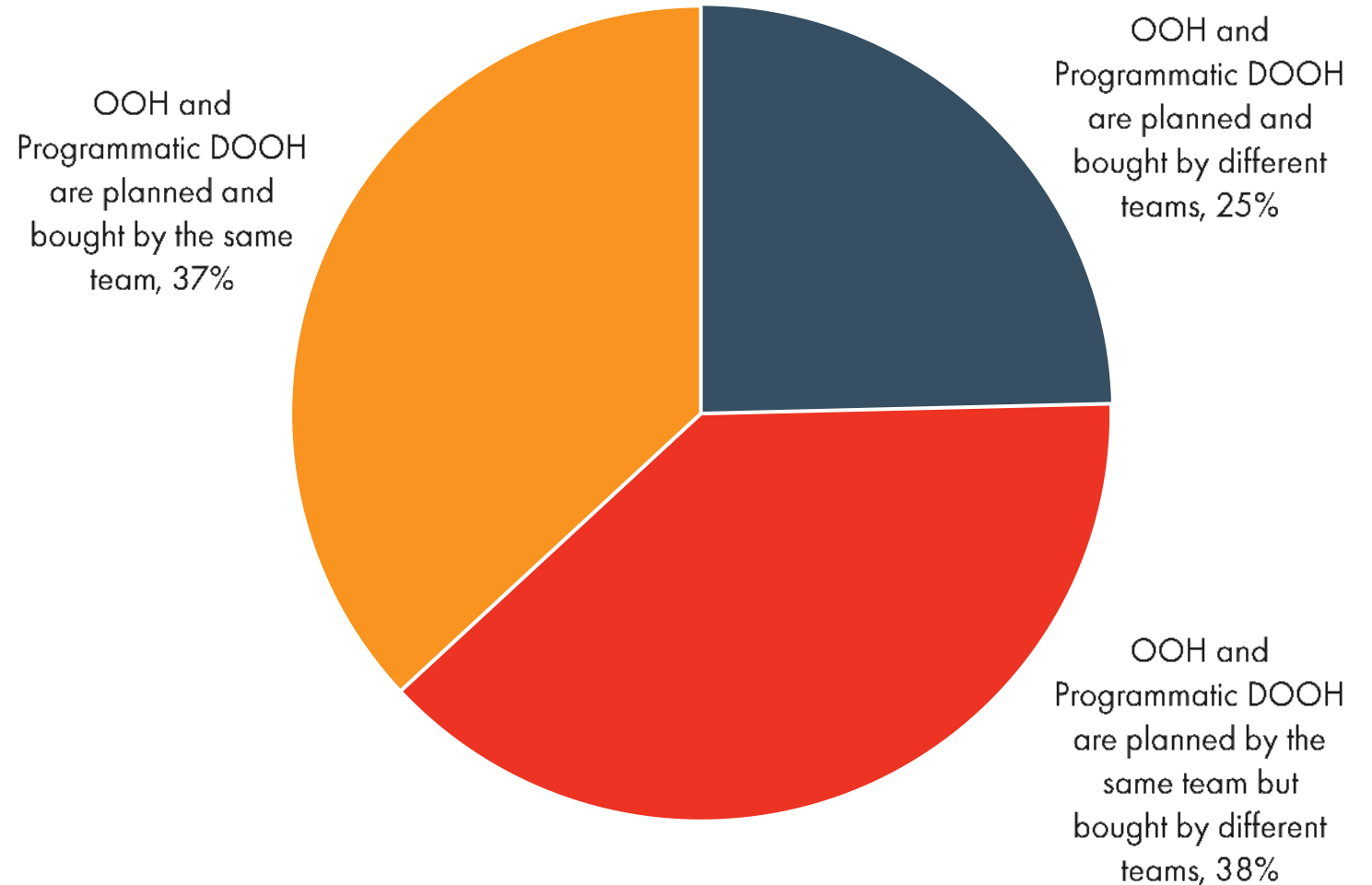
Metrics usually used to assess effectiveness of programmatic digital out of home advertising amongst all decision makers/influencers



out of home and pdooh planning and buying

Three-quarters (75%) of agency respondents using both Out-of-Home and Programmatic Digital Out-of-Home advertising, plan activities within the same team. 37% both plan and buy within the same team.

Planning and buying OOH and programmatic DOOH amongst Agencies

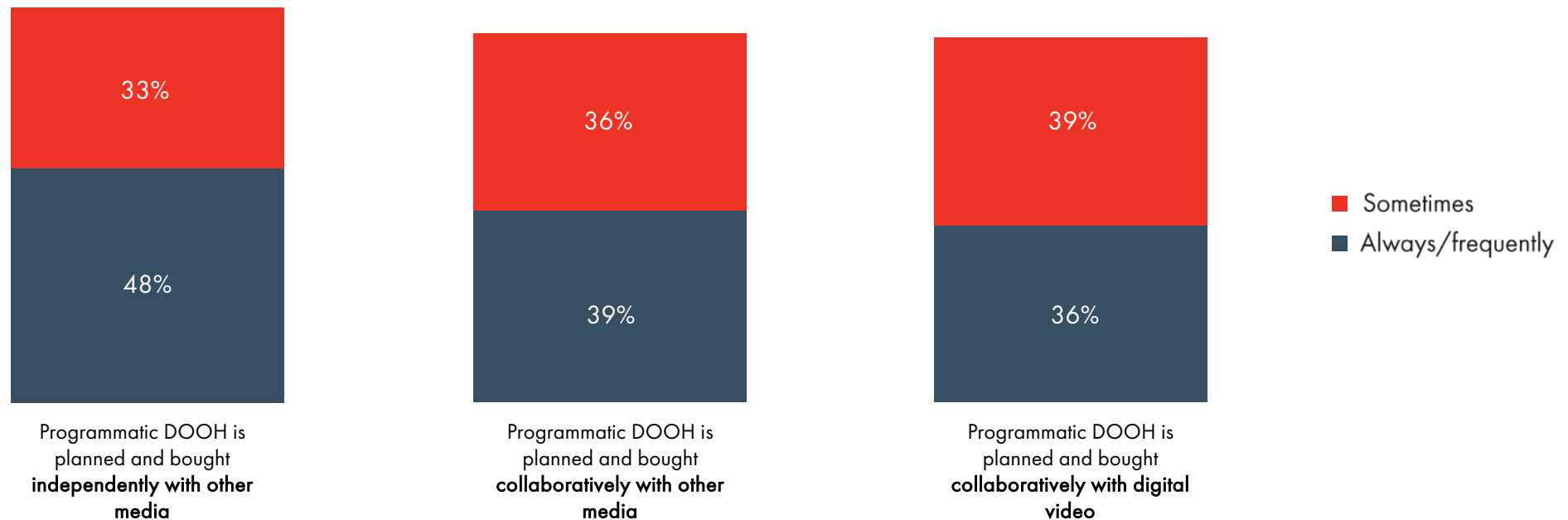


planning and buying programmatic dooh

Nearly half (49%) of Programmatic DOOH decision makers/influencers always or frequently plan and buy Programmatic DOOH independently from other media.

Three-quarters are at least sometimes planning and buying Programmatic DOOH with digital video or digital display.

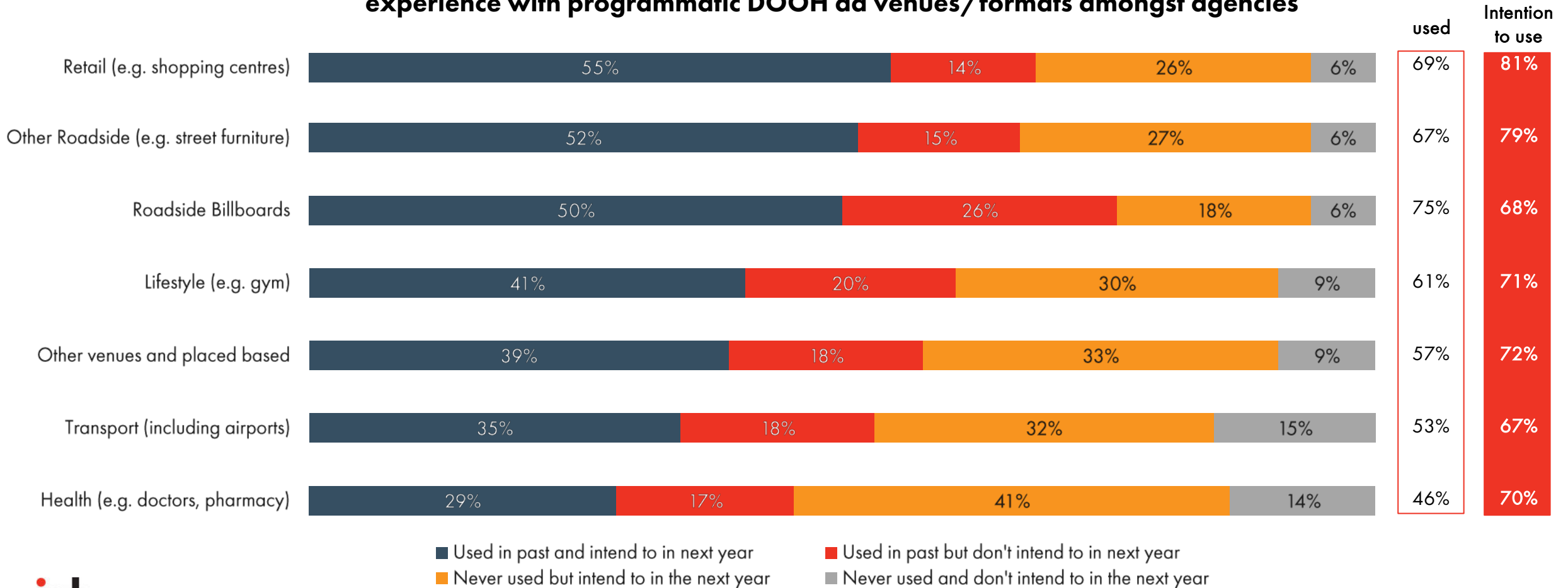
Planning and buying programmatic DOOH with other channels amongst all decision makers/influencers



usage of programmatic dooh formats

Amongst agencies, Roadside Billboards, Retail and Other Roadside formats are the most used for Programmatic DOOH advertising. Retail and Roadside (excl billboards) have the highest intention for use programmaticaly in the next year. There is also strong intention to use Lifestyle, Health and other venues based formats.

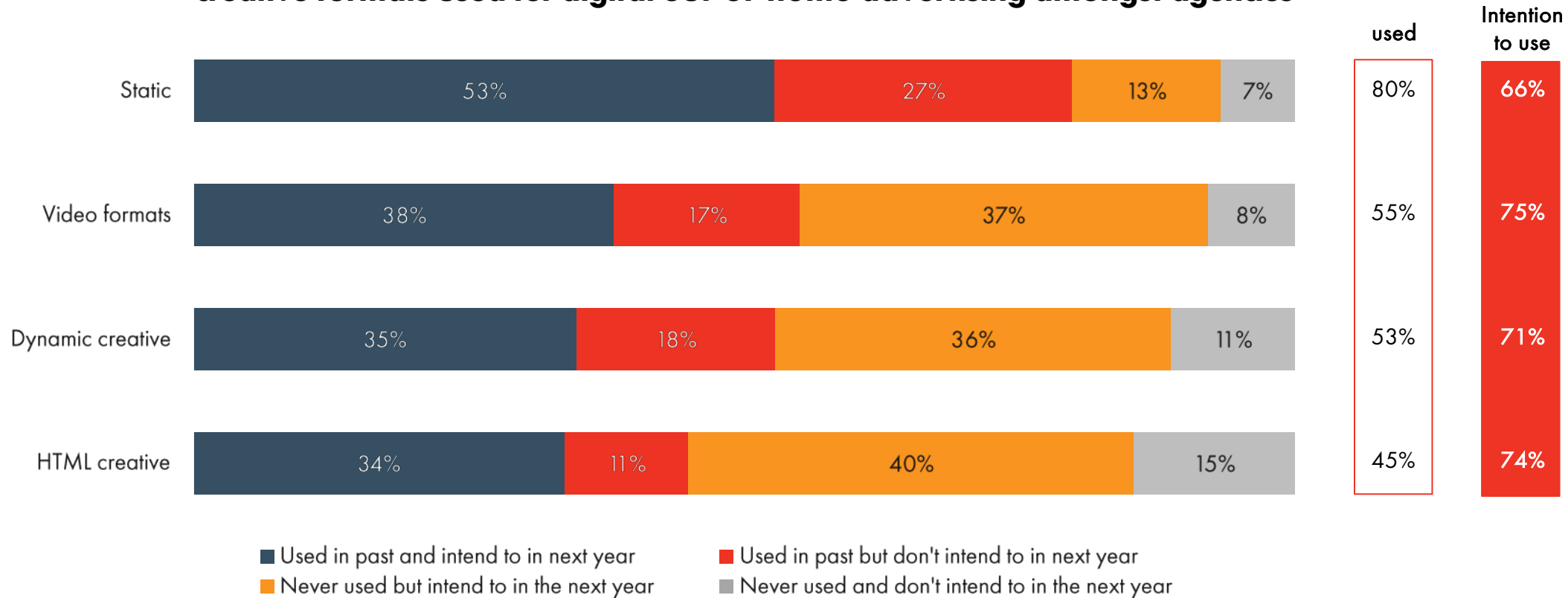
experience with programmatic DOOH ad venues/formats amongst agencies



use of dooh creative formats

Amongst agencies, static formats are the most used creative formats for DOOH advertising. 8 in 10 agencies (80%) have used static creative formats and over half (55%) have used video formats. Three-quarters (75%) of agencies intend to use video creative formats for Digital Out-of-Home advertising over the next year. HTML creative follows closely with 74% of agencies intending to use in the next year.

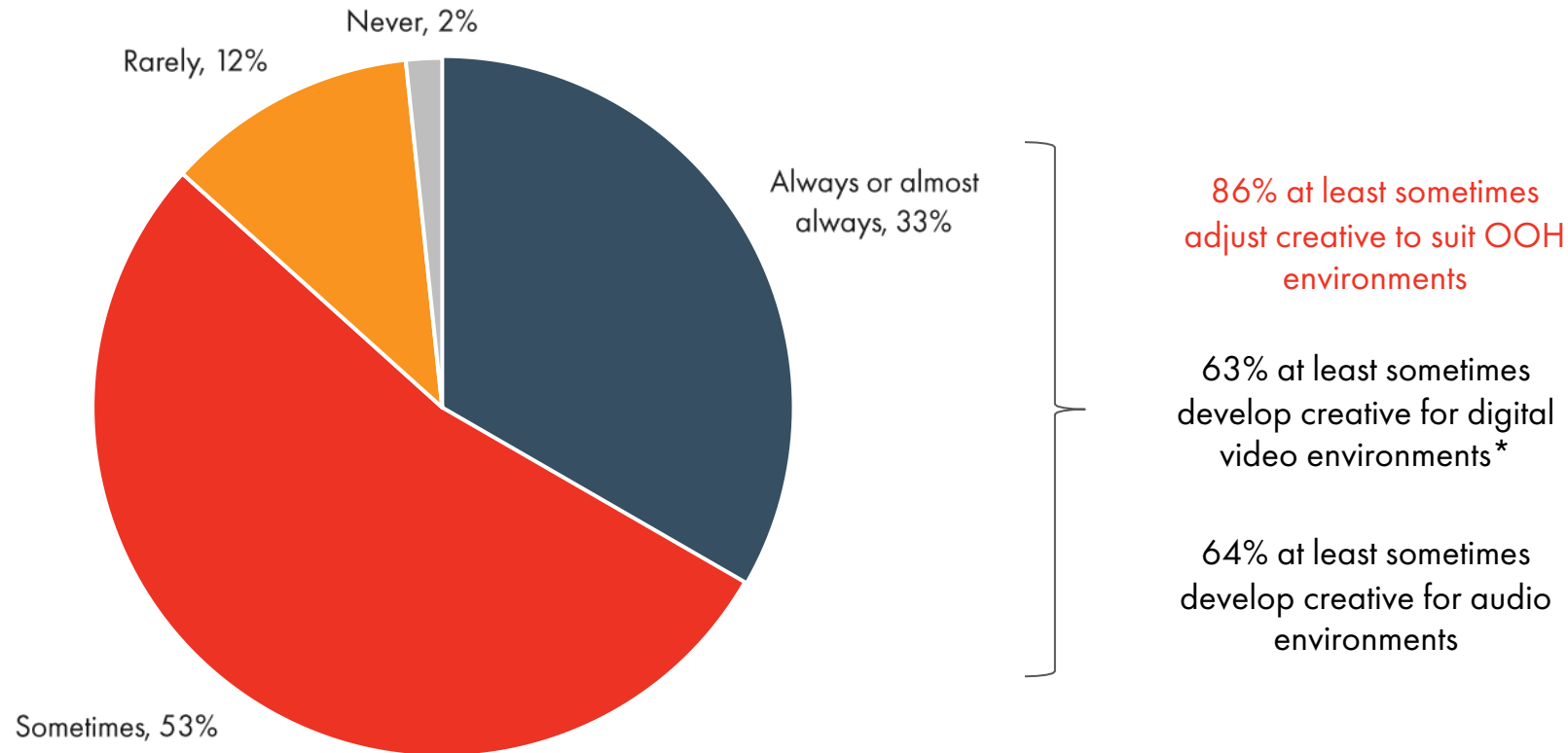
creative formats used for digital out-of-home advertising amongst agencies



fit for purpose creative

When running campaigns across Programmatic channels (e.g. display, video, mobile, OOH), due to the formats of DOOH advertising there is a high frequency of adjusting creative to suit the environment. Creative quality is one of the most important drivers of digital advertising effectiveness so its worth putting effort into adapting creative to suit the different out-of-home environments.

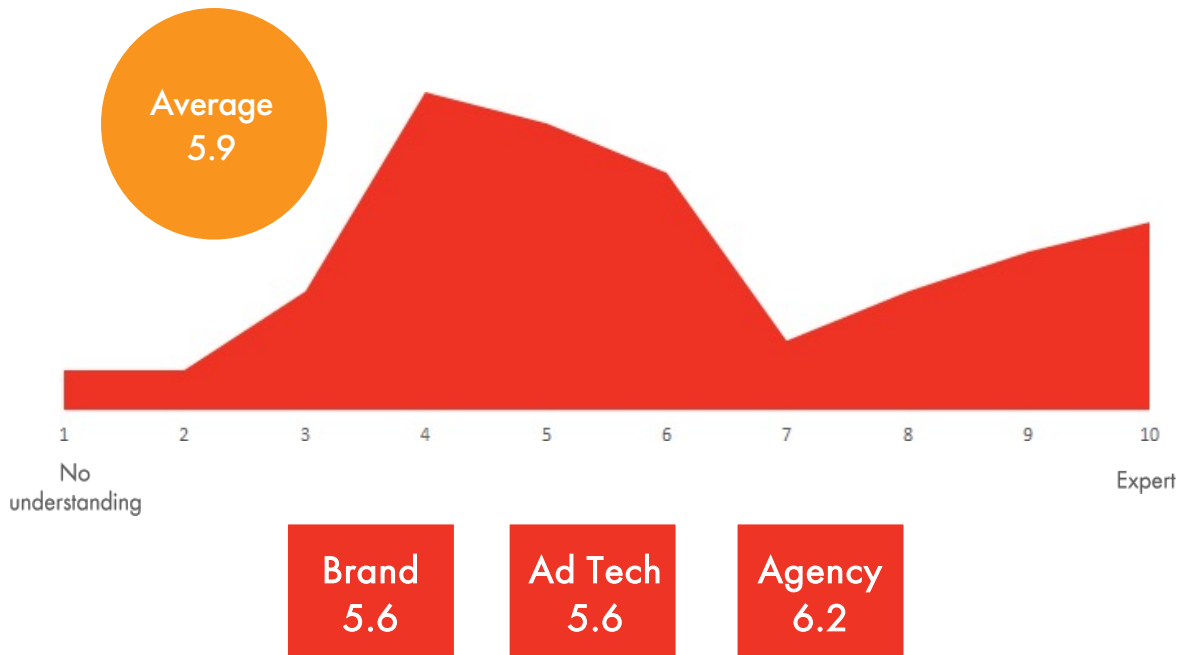
frequency of adjusting creative to suit out of home environments amongst agencies



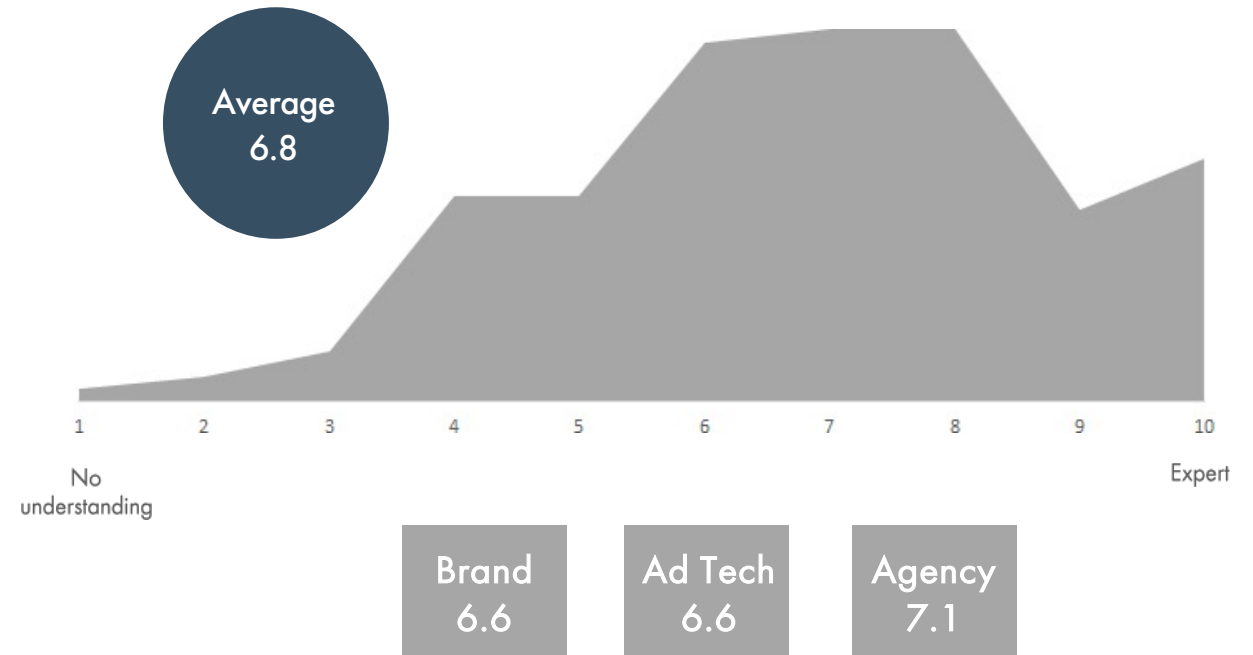
understanding of out of home advertising

On average, all advertising decision makers and influencers surveyed rated their understanding of digital out-of-home advertising at 6.8 out of 10, where 10 was an expert level of understanding. As expected, agencies have a slightly higher level of understanding of out-of-home advertising.

understanding of traditional out of home advertising



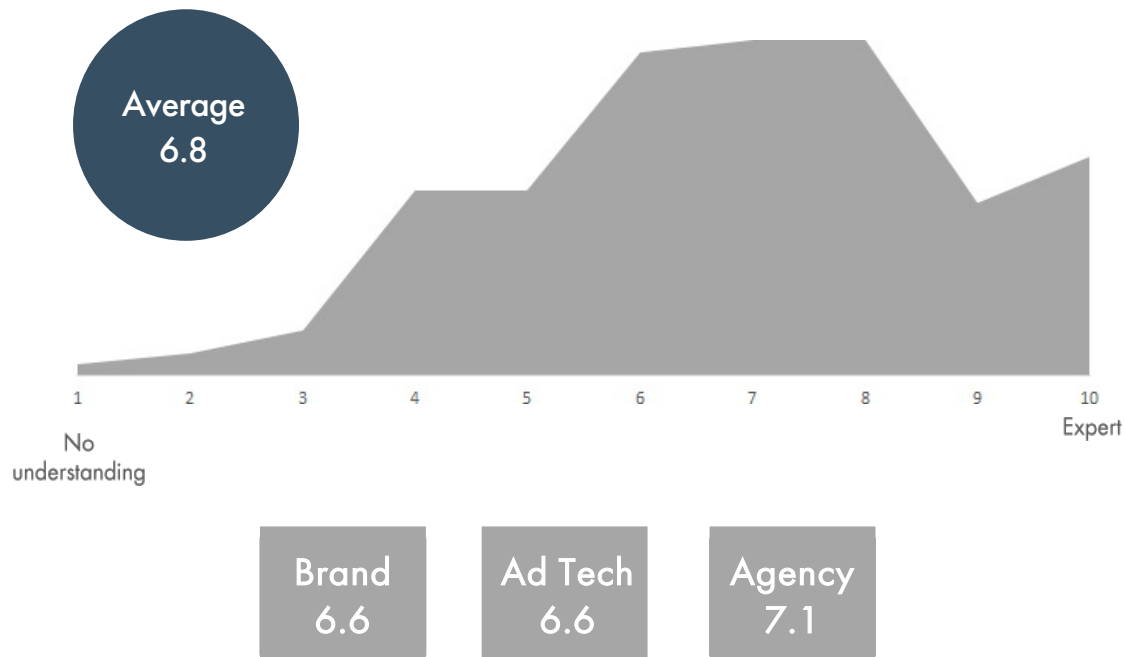
understanding of digital out of home advertising



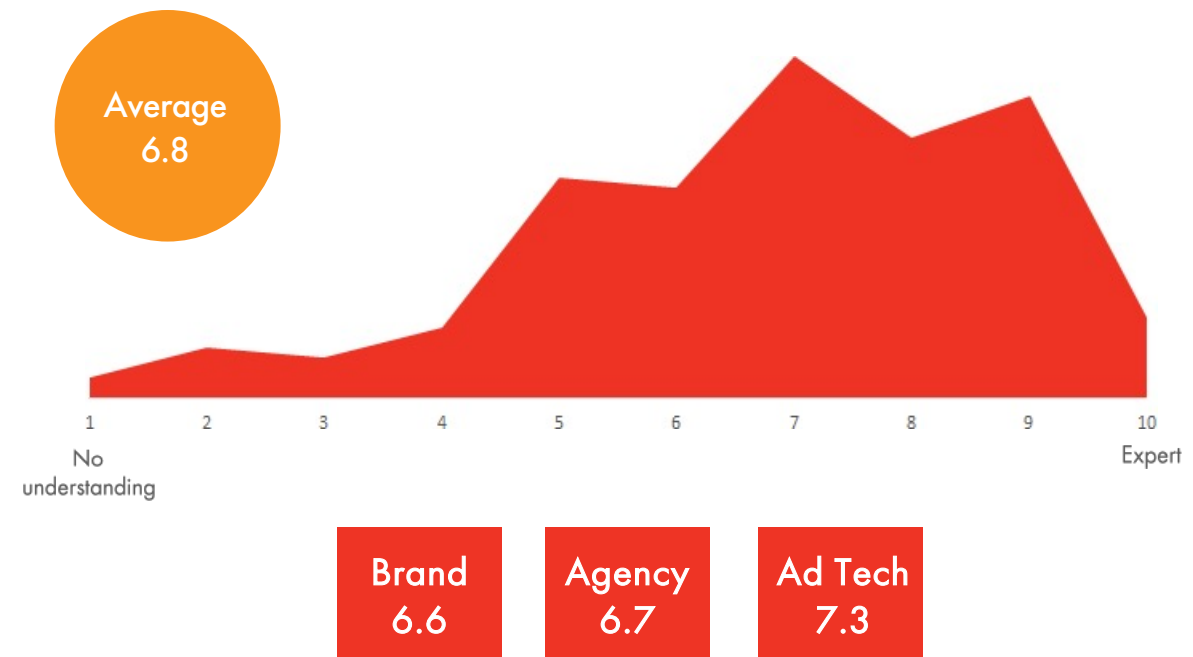
understanding of out of home advertising

On average all advertising decision makers and influencers surveyed, rated their understanding of Programmatic digital out-of-home advertising at 6.8 out of 10, where 10 was an expert level of understanding. Ad Technology suppliers had a slightly higher level of understanding than agencies and brands.

understanding of digital out of home advertising



understanding of programmatic digital out of home advertising

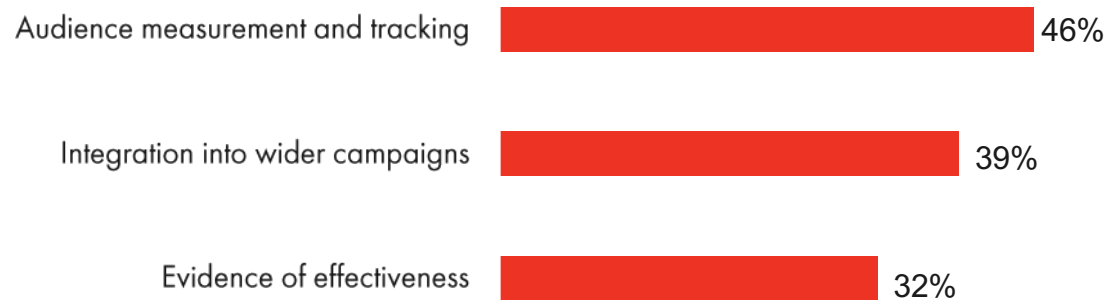


opportunities for out of home advertising

Addressing audience measurement and standardized metrics is a consistent opportunity across all OOH advertising. Addressing a lack of advertiser and agency understanding is the greatest opportunity to ensure Programmatic Digital out-of-home can attract a larger proportion of advertising spend.

top 3 issues preventing ooh advertising from being a larger proportion of ad volume

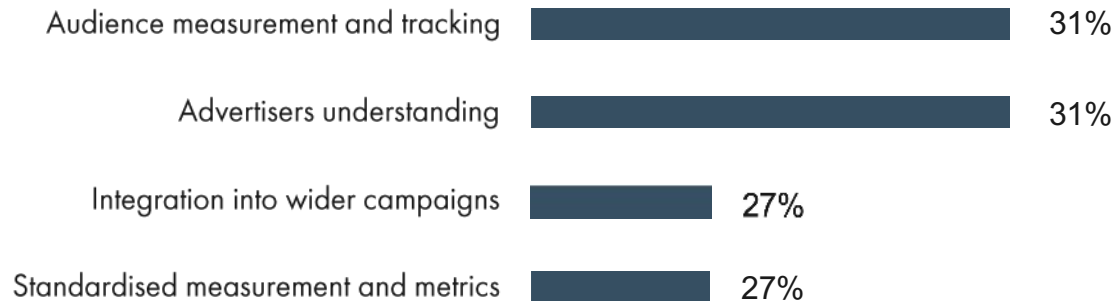
traditional ooh advertising



Programmatic dooh advertising



digital ooh advertising



top 3 opportunities for driving growth in programmatic dooh

Addressing a lack of advertiser and agency understanding is the greatest opportunity to ensure Programmatic Digital out-of-home can attract a larger proportion of advertising spend. It is also important to address the lack of understanding of cost versus benefit particularly amongst agencies and lack of audience measurement particularly amongst brands/advertisers.

top 3 opportunities for driving growth in programmatic dooh advertising

AMONGST AGENCIES

- 1 Educating advertisers
- 2 Educating agencies
- 3 Educating on cost versus benefit

AMONGST BRANDS/ADVERTISERS

- 1 Educating advertisers
- 2 Improving audience measurement and tracking
- 3 Providing evidence of effectiveness

AMONGST AD TECH SUPPLIERS

- 1 Educating agencies
- 2 Standardising measurement and metrics
- 3 Educating advertisers

Addressing a lack of advertiser and agency understanding is the greatest opportunity to ensure programmatic digital out-of-home can attract a larger proportion of advertising spend.

promoting a stronger role for programmatic dooh

Overwhelmingly the industry supports education initiatives and case studies to improve understanding of the role Programmatic DOOH, along with initiatives to improve and standardise measurement.

A lot of the major agency holding groups are still working out where it sits internally across planning & buying. We're very much ready to sell and run more programmatic DOOH but waiting on a lot of agencies to decide how to engage the agency teams.

-Ad Tech Supplier

New technologies will introduce monitoring and audience statistics technology that will improve the accuracy of advertisements so that suitable advertisements can be played for the right audience at the right time, reducing the waste of advertisers and improve efficiency.

-Ad Tech Supplier

Promoting the efficiencies created via its integration into an omnichannel campaign strategy and being able to track sales, in-store visits and the additional brand awareness driven when combined with a wider digital campaign.

-Ad Tech Supplier

There is still the assumption that Programmatic OOH is remnant inventory, and thus we need to inspire advertisers to consider the impact and premium-ness of this channel.

-Agency

Use the same measurement calculations for impression multipliers etc. We need to have a standardised approach from all ssps and offline/online buying teams to show the true value of

prOOH

-Agency

Show the strength of DOOH in being able to target audiences given the imminent demise of online cookies.

-Agency

We're all data driven marketers and no-one self respecting would take too big of a leap without cold, hard stats to back up our decisions. Examples of stellar execution are needed to get the excitement pumping.

-Brand

Educate buyers on the process and capability so that they can understand the benefits clearly. If people actually understand how it all works, the benefits are very evident. Educate, educate, educate!!

-Brand

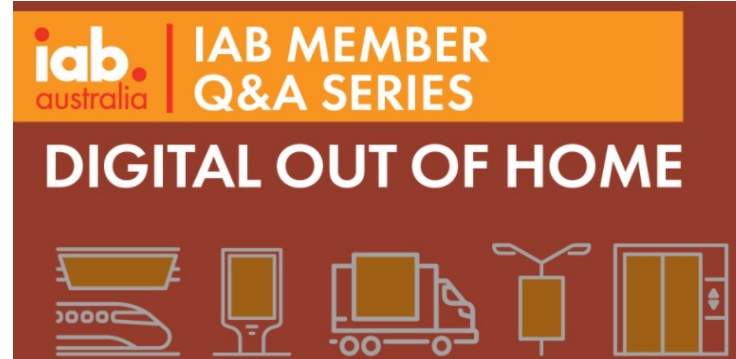
Don't lose site of OOH's core strength - public screens that build brand fame because they're seen and "overheard" by a broad audience. Brands aren't build in silos.

-Agency

more resources



[DOOH from go to whoa webinar:](#)
[June 2020](#)



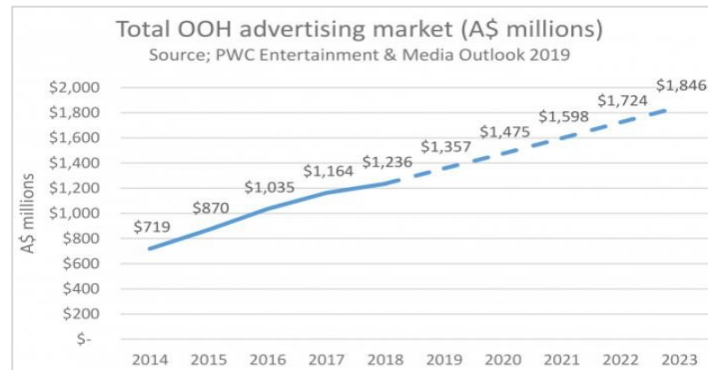
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