

JCDecaux



SURVEY RESULTS

JCDECAUX WHITEPAPER PROGRAMMATIC OOH 2021

GLOBAL PROGRAMMATIC OOH SURVEY

BY JCDECAUX AND APG | SGA

This survey examines the current market maturity in regards to Programmatic OOH and helps the programmatic industry to understand the current OOH maturity better. It was conducted online from 7th of June to 2nd of July 2021 by an independent research agency for JCDecaux and APG | SGA and aimed at the following focus groups: Specialists (traditional OOH buyers), Media, Digital and Creative Agencies, Demand Side Platforms (DSPs) as well as direct clients/ in-house Trading Desks. This includes participants across the globe, e.g. Germany, United Kingdom, France as well as Hong Kong and the United States of America.

Central questions that were asked within the survey:

How is Programmatic OOH currently used? What are the perceived advantages and disadvantages within the development of Programmatic OOH? What challenges does Programmatic OOH currently face and what are the trends?

The following results have emerged based on these questions.

KEY STATEMENTS

The importance of Programmatic OOH will continue to grow.

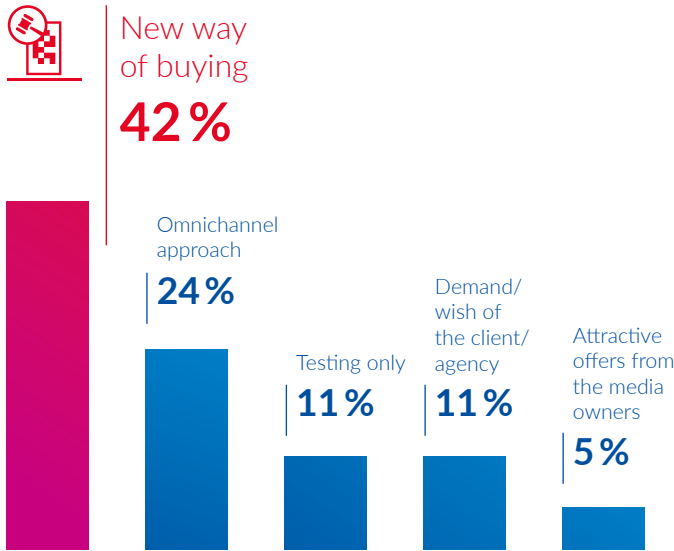
Branding and awareness can be identified as the most relevant campaign objective across the target groups.

This is followed by image/purpose and performance (sales, store visits, website traffic, etc.).

98%

of the respondents assume that the Programmatic OOH share will continue to increase in the future.

WHAT IS THE MAIN REASON FOR IMPLEMENTING/CONSIDERING THE IMPLEMENTATION OF PROGRAMMATIC OOH?



Programmatic OOH is currently fascinating because it is a new way of buying (42%), but is also popular because of the omnichannel approach.

WHICH KEY PERFORMANCE INDICATORS (KPIs) ARE RELEVANT FOR PROGRAMMATIC OOH?



Gross reach (impressions/OTS/LTS)

65%

Net reach (unique users)

53%

Store Visit/ Footfall

52%

Brand awareness (brand uplift study)

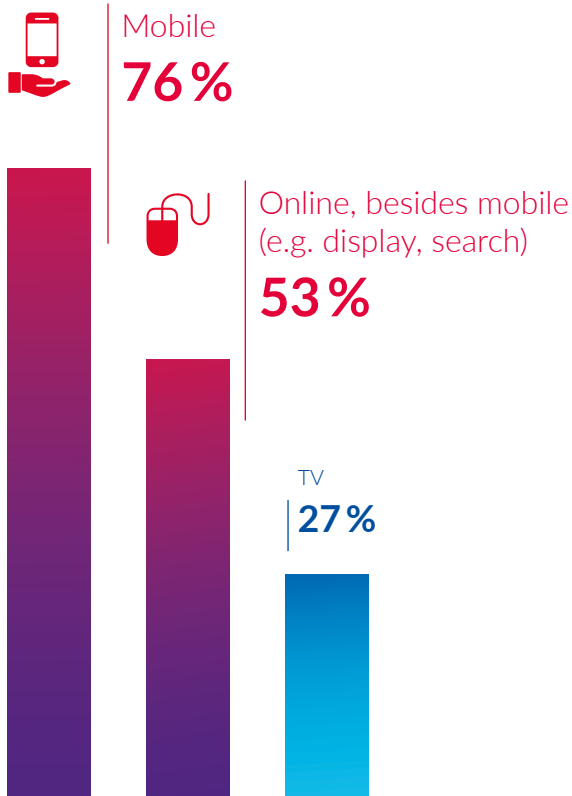
50%

Cost per Lead (CPL)/Download/Order

21%

Gross reach is the relevant KPI for 65% of respondents. However, the following KPIs are almost as important. Only the cost-driven KPI CPL falls slightly behind with 21%.

WHICH PAID MEDIA CHANNEL IS THE BEST MATCH FOR PROGRAMMATIC OOH USING AN OMNICHANNEL APPROACH?



Programmatic OOH is most often extended extended online - e.g. mobile. But TV is also a suitable complement to Programmatic OOH for 27% of respondents.

WHAT ARE THE DECISION CRITERIA WHEN SELECTING MEDIA OWNERS FOR A PROGRAMMATIC OOH CAMPAIGN?



Portfolio
79%



Targeting Options
73%



CPM/Pricing
82%



OOH BUYING MODEL - WHICH ONE IS USED, WHICH ONE PREFERRED?

Both self-service and managed service are used by the target group as a buying model (42%), but self-service is preferred (30%). Self-service means that clients execute campaigns in the DSP on their own. Campaigns that are executed for the client either by an agency or by a media owner, can be understood as managed service.

HOW DO YOU CURRENTLY BUY OOH PROGRAMMATICALLY? IF YOU WORK FOR A DSP - WHICH PROGRAMMATIC OOH BUYING OPTIONS DO YOU OFFER IN YOUR DSP?



Programmatic Guaranteed/
Direct Deals

71%

Non-Guaranteed Deals/
Unreserved Fix Rate Deals

60%

Open
Auction

35%

Always-on Deals/
Evergreen Deals

33%



Programmatic guaranteed is in the lead here. However, when it comes to PREFERENCE, the buying model „Non-Guaranteed Deals“ (31%) is ahead of „Programmatic Guaranteed“ (20%).

WHAT ARE CURRENTLY YOUR BIGGEST COMMERCIAL CHALLENGES REGARDING PROGRAMMATIC OOH?

TOP 3

External client education on the value proposition of Programmatic OOH.

79%

Building Omnichannel products, for example audio & OOH or TV & OOH campaigns.

73%

Integrating 3rd-party-data and measurement providers for OOH.

82%



Due to the different maturity of Programmatic OOH in comparison between markets, we can identify challenges that can be attributed to the current situation within countries.

Starting with the definition of the general strategy for dealing with Programmatic OOH to the acquisition and convincing of new customers and the associated education and knowledge transfer.

There is a need for training regarding the benefits and also regarding omnichannel links with Programmatic OOH.



FOCUS GROUP STATEMENTS



BRAND/
DIRECT CLIENTS

Most important campaign objective for using Programmatic OOH:
Branding/Awareness.

Campaigns are aimed at achieving a high number of net contacts.
The focus is on reach and awareness.

Biggest challenge: Privacy and data-sharing regulations.



SPECIALISTS
(traditional OOH buyer)

For Specialists, **targeting** (82%) is the decisive factor for booking Programmatic OOH (compared to insertion order). **Barriers to implement Programmatic OOH** can still lie in pricing, programmatic maturity and strategic decisions.

Study design and case numbers

Method: International online/mobile survey with Trend Research, Hamburg.

Focus group: 6 central target groups: Specialists (traditional OOH buyers), Media Agencies, Digital Agencies, Demand Side Platforms (DSPs), Direct clients/ In-house Trading Desks, Creative Agencies. Number of cases: 106 subjects.

Country participation (13): Belgium, Canada, France, Germany, Hong Kong, Italy, Luxembourg, Netherlands, Singapore, Spain, Switzerland, United Kingdom, United States of America.

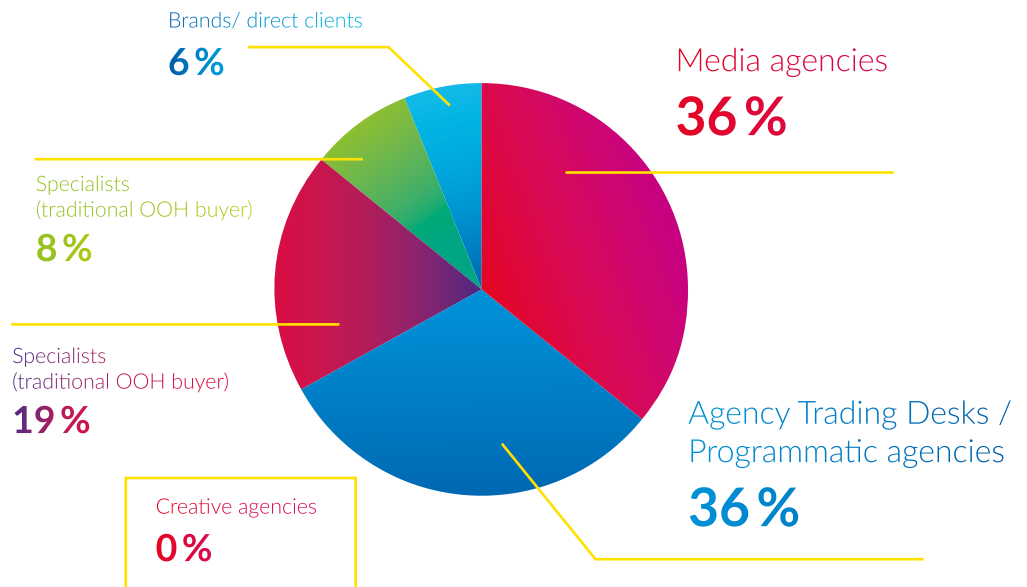


DSPs

Almost all DSPs (92%) describe OOH as an absolute priority regarding their commercial strategy and expect the global OOH DSP revenue number to increase in the next years.

- The majority of DSPs show EMEA, APAC and US / North America as they key regions in terms of Programmatic OOH development. This could be explained by the majority of media revenue being controlled by these 3 regions.
- For one third of the DSPs, the OOH share is up to 30% of the total turnover. For 11% even more than 90% of the total turnover.
- For 28% of DSPs, total OOH revenue is USD 1-10 million annually.

Top 3 clients that show the highest OOH spend with the DSPs:



This shows that a significant proportion of DSPs focus on the OOH segment.

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