

# State of the Nation

Programmatic OOH 2023  
German white paper



# EXECUTIVE SUMMARY



- ◆ **Growth is set to continue**, with the vast majority of German survey respondents saying that they will increase spend in the next 18 months, by almost a third on average.
- ◆ **German advertisers take advantage of the speed to market that is afforded through programmatic buying**, and whilst most budgets for prDOOH are coming from digital out-of-home (DOOH) or traditional out-of-home (OOH) budgets, a significant proportion of German advertisers surveyed are also reallocating digital budgets for prDOOH.
- ◆ German advertisers surveyed believe that prDOOH offers some of the most **innovative and exciting opportunities in the market in 2023**.
- ◆ German advertisers use prDOOH for **both brand awareness and performance objectives**. However, they are increasingly using prDOOH for performance marketing, as it offers a unique opportunity to reach consumers at scale and drive measurable results.
- ◆ German advertisers are still **facing challenges in measuring the effectiveness** of prDOOH in their cross-channel marketing campaigns. They want to see concrete data that proves the value of prDOOH and its impact on other media channels.
- ◆ **Environmental factors** have become an increasingly important consideration for German advertisers in their media planning and buying, making the one-to-many format of prDOOH an increasingly attractive solution.
- ◆ Providing **training and resources** to a wide range of teams about the value of prDOOH, as well as sector-specific insights and case studies, will help to increase adoption in Germany.



VIOOH partnered with research and strategy agency, MTM, to survey 1,200 advertisers and agencies across the US, UK, Australia, Germany, France, and Spain to learn about the current state of the nation of programmatic digital out-of-home (prDOOH) advertising.

Participants in this research have already purchased prDOOH in the past 12 months, plan to purchase it in the next 12 months or are digital buyers open to purchasing it.

This report covers the highlights of the German market. The full global report can be [found here](#).



# WHAT IS THE CURRENT STATE OF THE NATION OF PROGRAMMATIC DIGITAL OUT-OF-HOME IN GERMANY?



Programmatic digital out-of-home (prDOOH) is very popular amongst advertisers in Germany. Survey results show that out of the campaigns German advertisers have worked on in the past 12-18 months, on average nearly a third (31%) have included prDOOH in the media plan<sup>1</sup>. This positive outlook is set to continue, with the average increasing to 39% of media plans likely to include prDOOH in the next 18 months<sup>2</sup>.



ON AVERAGE, ADVERTISERS WILL **INCLUDE prDOOH** IN 39% OF MEDIA PLANS IN THE NEXT 18 MONTHS

Programmatic DOOH still has room to grow though, as many digital out-of-home campaigns are still purchased directly. Currently 43% of German advertisers usually or always purchase their DOOH campaigns through direct buys only, followed by 36% who say they usually or always use a mix of both direct buys and programmatic buys<sup>3</sup>.



1. C10: Think of the campaigns you've worked on in the past 18 months, for what proportion have you placed, planned, or bought programmatic digital out-of-home advertising?
2. C11: Now think of the campaigns you'll be working on in the next 18 months, for what proportion do you think you will place, plan, or buy programmatic digital out-of-home advertising?
3. B11: In the past 12 months, how have your digital out-of-home campaigns typically been bought?



# 27%

GERMAN ADVERTISERS  
PLAN TO **INCREASE SPEND**  
IN PROGRAMMATIC DIGITAL  
OUT-OF-HOME BY AN  
AVERAGE OF 27% OVER THE  
NEXT 18 MONTHS

**“I think we will see a budget increase in prDOOH over the next years. Establishing a strong connection to our cross-channel solutions is a focus topic and also getting more and more Germany-wide programmatic campaigns with dynamic messaging components”**

ROBERT SAGEBAUM, EXPERT LEAD PROGRAMMATIC, GROUPM

Survey respondents in Germany suggest that they plan to continue placing spend on prDOOH, and in the vast majority of cases, this means increasing spend (by an average of 27% over the next 18 months)<sup>4</sup>.

**“The budget for prDOOH will increase, especially as the inventory on DV360 continues to increase across our markets. This will make it a lot easier for our channel managers to convince local teams to buy more”**

SYLWIA BARDZIK, GLOBAL DIRECTOR BRAND MEDIA, DELIVERY HERO



4. B7: How do you think your advertising investment in the following media will change in the next 18 months?

# WHAT IS FUELLING THE GROWTH OF PROGRAMMATIC DIGITAL OUT-OF-HOME IN GERMANY?



Thanks to high population density in urban areas of Germany that provides ideal conditions for effective out-of-home (OOH) campaigns, OOH advertising has a long history in Germany, and many advertisers have been utilising the format in their plans for a number of years.

**"The programmatic DOOH infrastructure is expanding rapidly, and there is a substantial investment being made on the publisher side. Additionally, we have observed an increasing number of clients implementing first-party data into their prDOOH campaigns to enhance the overall success. On the creative side, we are telling a really cohesive story across channels"**

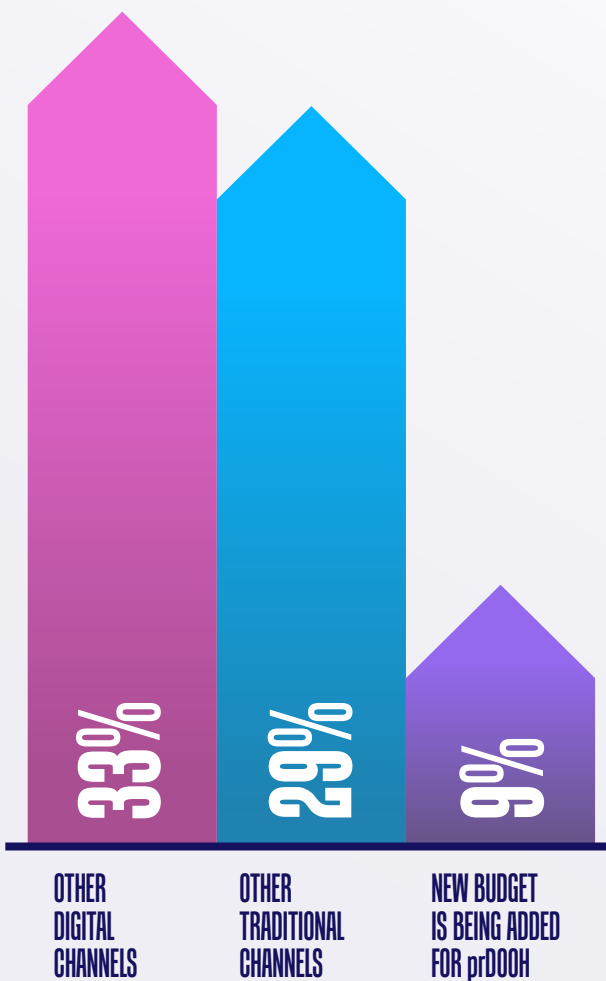
ROBERT SAGEBAUM, EXPERT LEAD PROGRAMMATIC, GROUPM



The market for DOOH is showing strong growth, and is expected to reach \$0.47bn in 2023, with an annual growth rate of 17% from 2023 to 2027<sup>5</sup>. Whilst the greatest proportion of reallocated budget for prDOOH is coming from existing DOOH (54%) and traditional OOH (49%) budgets, as programmatic in DOOH inevitably moves towards becoming the new normal, a significant percentage is being moved from other digital channels (33%) and other traditional channels (29%)<sup>6</sup>.



## IF BUDGET IS GOING TO BE INCREASED FOR PROGRAMMATIC DIGITAL OUT-OF-HOME, WHERE IS THIS BUDGET BEING MOVED FROM?



Source: C5 Base size DE (168)

**“We have to buy traditional OOH up to eight weeks in advance. With prDOOH we are guaranteed speed to market, which is a huge benefit to us, especially if we want to run a last-minute deal”**

SYLWIA BARDZIK, GLOBAL DIRECTOR BRAND MEDIA, DELIVERY HERO

In Germany, only 2% of main OOH teams are likely to be accessing new budget for prDOOH. However, when buying is diversified, they are more likely to be adding new budget (digital or programmatic team 13%, Managed Service DSP team 17%, dedicated prDOOH team 22%).

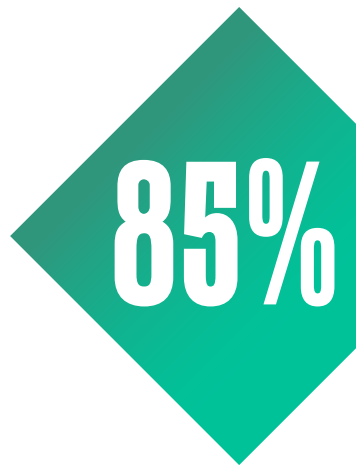


5. <https://www.statista.com/outlook/amo/advertising/out-of-home-advertising/digital-out-of-home-advertising/germany>  
6. C5: If the budget is going to be increased for programmatic digital out-of-home, where is this budget being moved from?



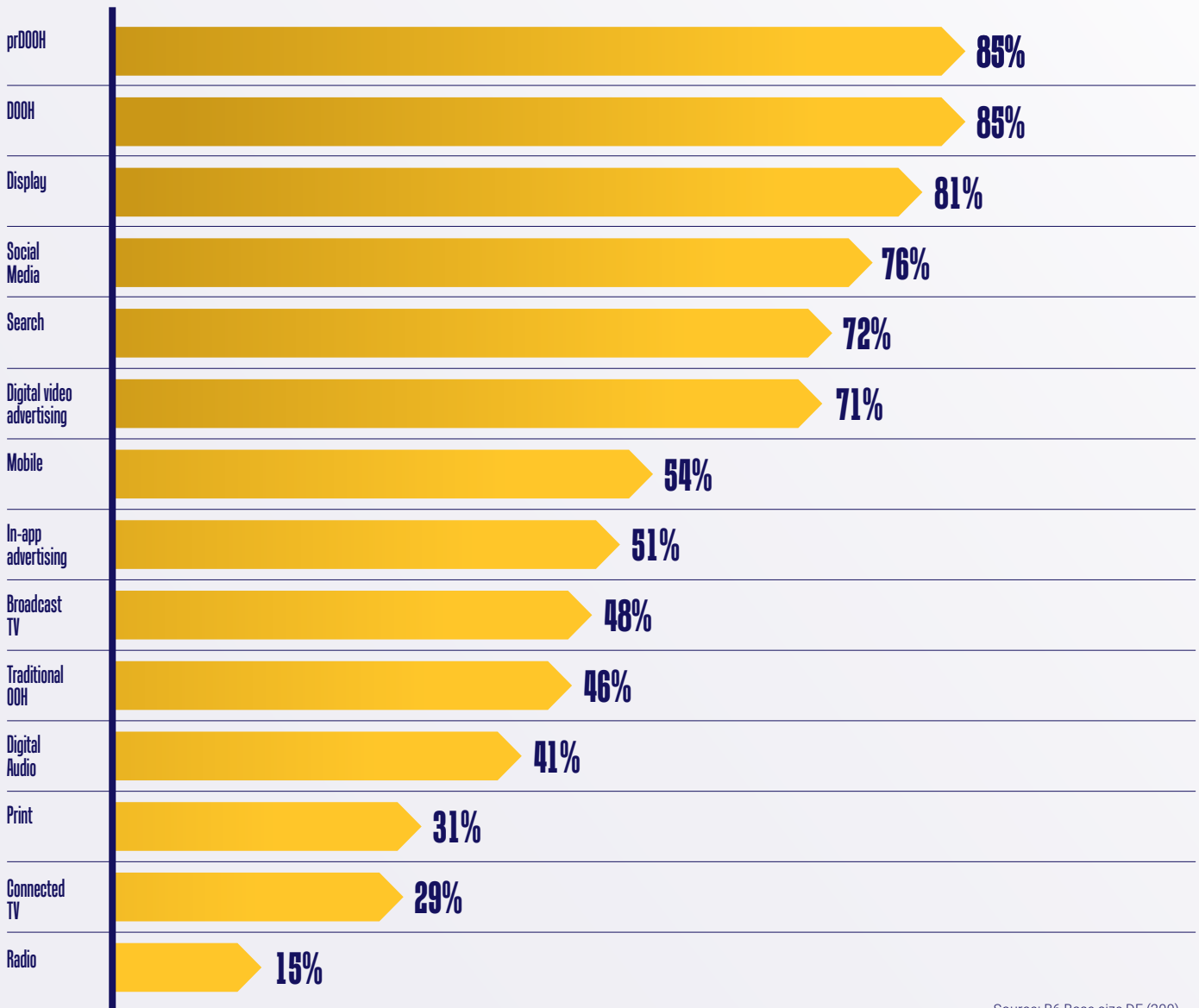
As the number of advertisers in Germany adopting prDOOH continues to rise, so does awareness of the distinctive advantages that prDOOH can offer.

As such, it's no surprise that respondents from the German market feel that, alongside DOOH (85%), prDOOH offers the most innovative opportunities out of any other channel included in our survey<sup>7</sup>. So much so, that nearly 1 in 10 German advertisers surveyed (9%) have created new spend for prDOOH<sup>8</sup>.



**85% OF GERMAN ADVERTISERS SURVEYED BELIEVE THAT PROGRAMMATIC DIGITAL OUT-OF-HOME OFFERS INNOVATIVE OPPORTUNITIES**

## WHICH OF THESE MEDIA ARE DEVELOPING THE MOST INNOVATIVE OPPORTUNITIES FOR ADVERTISERS?



Source: B6 Base size DE (200)

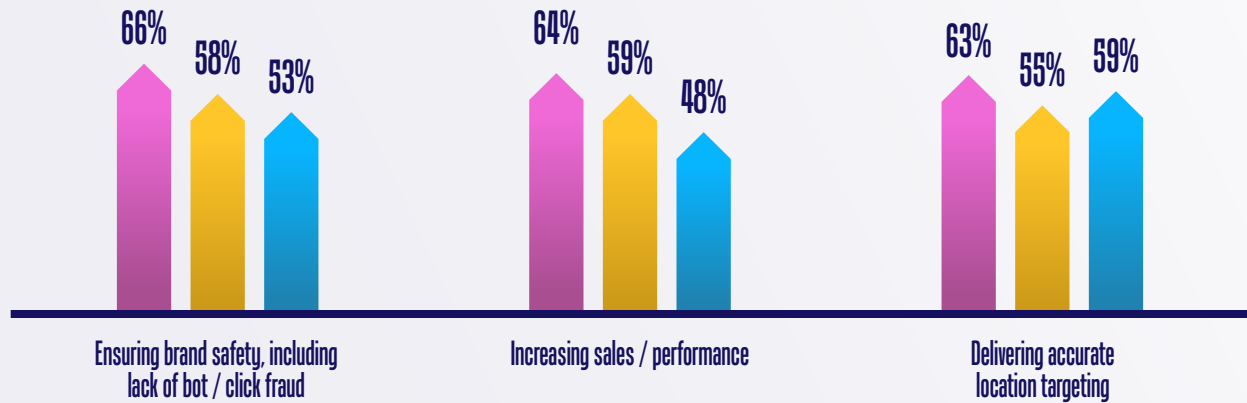
7. B6: Which of these media are developing the most innovative opportunities for advertisers?

8. C5: If the budget is going to be increased for programmatic digital out-of-home, where is this budget being moved from?



## WE WILL NOW SHOW YOU A LIST OF ATTRIBUTES AND MEDIA TYPES. PLEASE CHOOSE ANY MEDIA YOU FEEL DELIVER AGAINST THESE ATTRIBUTES

prDOOH ◆  
DOOH ◆  
Traditional OOH ◆



Source: B1 Base size DE (200)

PrDOOH marries the broadcast format of OOH with the hyper-targeted capabilities afforded by programmatic buying. This means that the medium can be leveraged for both performance and brand-led objectives, depending on the specific requirements of a campaign.

**“We are using prDOOH for both brand and performance. We can do a lot of contextual messaging, advertise all of the different products at different times of day. It’s also really useful to be able to adjust activations based on weather conditions”**

SYLWIA BARDZIK, GLOBAL DIRECTOR BRAND MEDIA, DELIVERY HERO

German advertisers have been at the forefront in Europe when it comes to utilising prDOOH in performance campaigns. Consequently, it is not surprising that boosting sales is a prominent advantage of prDOOH for the German advertisers surveyed. Two-thirds (64%) agree that prDOOH contributes to sales growth and overall campaign performance, which is the highest percentage across all markets surveyed, alongside the US<sup>9</sup>.

Furthermore, as privacy regulations tighten and the environmental crisis worsens, German advertisers are increasingly considering the ethical and environmental implications of the media that they plan and buy.

This has prompted advertisers to start examining the carbon footprint of activations and assess how this compares to other channels. In Germany, environmental considerations have been translated into regulatory requirements, including mandatory night-time blackout periods aimed at conserving energy.

Advertisers must also ensure compliance with regulations governing data collection and usage, while selecting channels that prioritise robust data practices and minimise the risk of breaches.

Due to its one to many format, prDOOH is considered to be both environmentally and ethically sound, making it an attractive solution within this context.

**“For advertisers, environmental concerns have definitely become more of an important factor to think about when buying media. PrDOOH is good for that, because it’s one to many, and it is digital as well”**

SYLWIA BARDZIK, GLOBAL DIRECTOR BRAND MEDIA, DELIVERY HERO

9. B1: We will now show you a list of attributes and media types. Please choose any of the media you feel deliver against these attributes.

# HOW IS PROGRAMMATIC DIGITAL OUT-OF-HOME TYPICALLY BOUGHT IN GERMANY

## AND WHERE DOES IT SIT ON A MEDIA PLAN?



Germany has a well-established and mature OOH advertising market. As a result, many advertisers and agencies are accustomed to planning and executing OOH campaigns, and prDOOH is commonly integrated into broader OOH campaigns (77% vs 72% globally)<sup>10</sup>.

“The use of prDOOH depends on the campaign goal. We often use prDOOH to complement and enhance traditional OOH campaigns. prDOOH has also been successfully integrated in cross-channel campaigns. Additionally, we have operated several successful single prDOOH campaigns in recent years. It is important to keep in mind that DOOH is a branding channel, but it can also have an impact on performance”

ROBERT SAGEBAUM, EXPERT LEAD PROGRAMMATIC, GROUPM

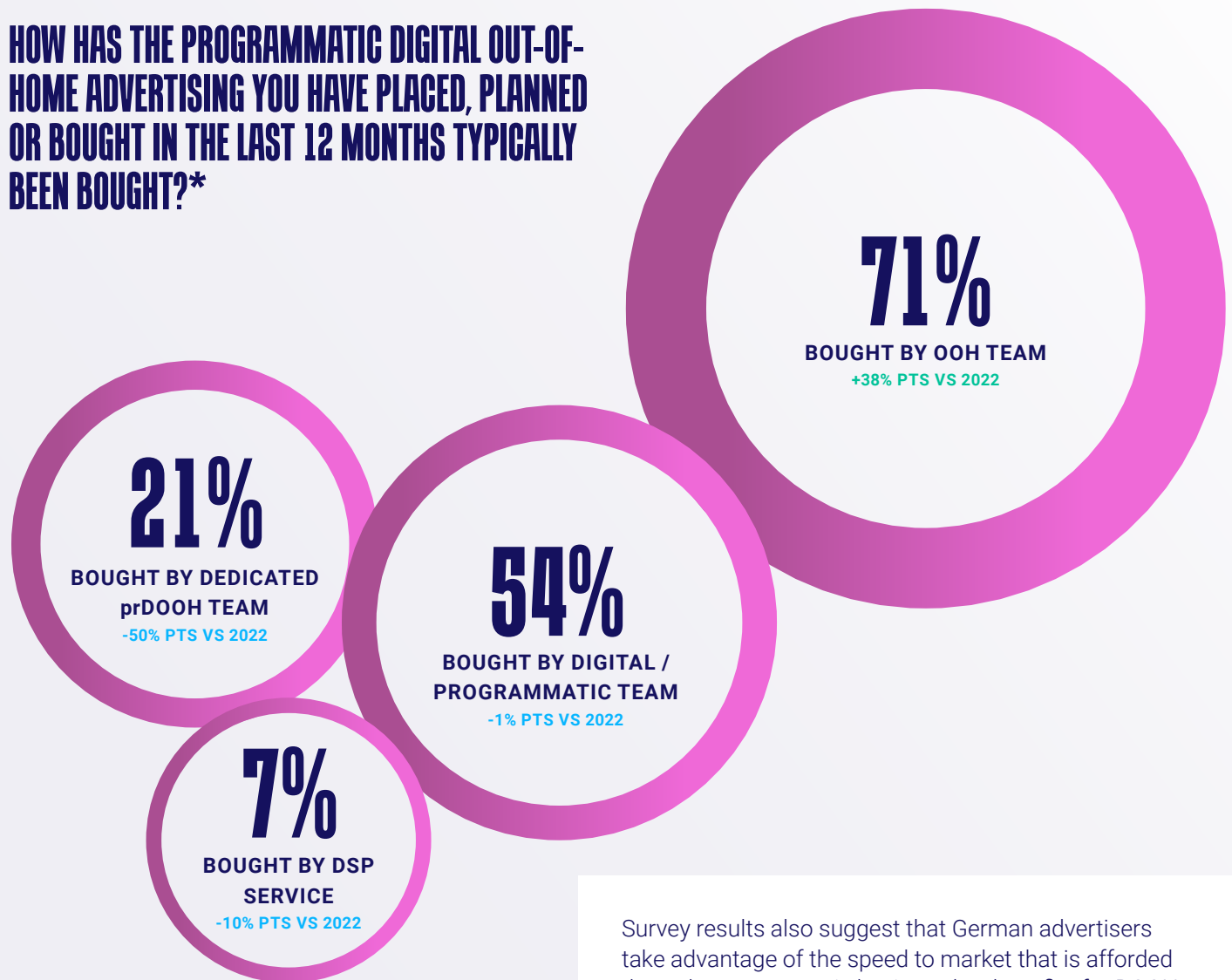
“If we’re doing a big 360 brand campaign we would see prDOOH as part of OOH. If we are doing a tactical campaign, we always prefer to use channels which can be localised, like prDOOH”

SYLWIA BARDZIK, GLOBAL DIRECTOR BRAND MEDIA, DELIVERY HERO



10. C2: How has the programmatic digital out-of-home advertising you have placed, planned or bought in the last 12 months typically been planned?

## HOW HAS THE PROGRAMMATIC DIGITAL OUT-OF-HOME ADVERTISING YOU HAVE PLACED, PLANNED OR BOUGHT IN THE LAST 12 MONTHS TYPICALLY BEEN BOUGHT?\*



\*Please note percentages in graph do not equal 100% due to participants being able to select more than one answer, allowing for overlap of responses

Source: C3 Base size DE (177)

This also extends to buying responsibilities, with survey respondents from Germany indicating that OOH teams oversee prDOOH buys in the vast majority of cases (71% vs 64% globally)<sup>11</sup>. The drop of prDOOH being bought by dedicated programmatic teams has been to the benefit of the OOH teams, essentially suggesting that prDOOH knowledge is becoming more integrated in the day-to-day OOH operations.

Survey results also suggest that German advertisers take advantage of the speed to market that is afforded through programmatic buying, a key benefit of prDOOH.

**Whilst prDOOH is typically added to a media plan during a campaign's planning and budget allocation phase, just over a third of German advertisers surveyed (36%) decide to include prDOOH on a plan when buying the media and activating the campaign<sup>12</sup>.**

As previously mentioned, German advertisers leverage prDOOH in both performance and branding contexts, but have a particular affinity for using it in performance-led campaigns<sup>13</sup>. Whilst 76% of German advertisers consider prDOOH important for brand-led campaigns, this figure increases for performance-based campaigns (87%)<sup>14</sup>. Perhaps more interestingly, a larger proportion of German advertisers emphasise the importance of prDOOH for performance-led campaigns compared to any other channel included in our survey. Over time, media professionals in Germany have seen prDOOH as more of a performance-led activity. Previously prDOOH ranked fourth among other channels in importance for performance-led campaigns in 2021; now it ranks first. The opposite trend is happening for brand-led campaigns - it used to rank second; now it ranks fifth.

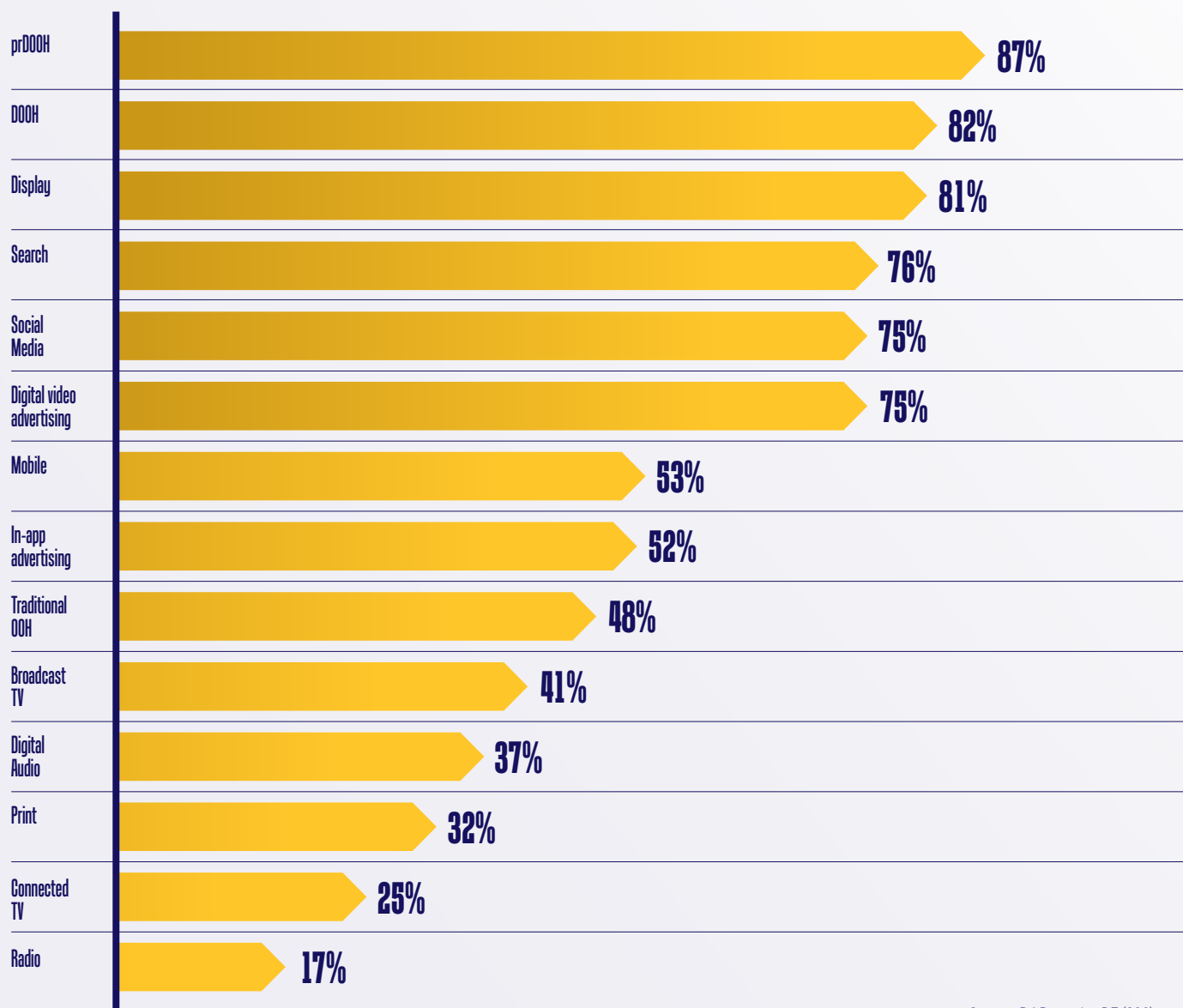
11. C3: How has the programmatic digital out-of-home advertising you have placed, planned or bought in the last 12 months typically been bought?

12. C12: While planning a campaign, when in the media planning process is the decision to include programmatic digital out-of-home typically happening?

13. B5: What channels do you see as important for brand-led campaigns?

14. B4: What channels do you see as important for performance-led campaigns?

## WHAT CHANNELS DO YOU SEE AS IMPORTANT FOR PERFORMANCE-LED CAMPAIGNS?



Source: B4 Base size DE (200)

# 87%

87% OF GERMAN ADVERTISERS SURVEYED BELIEVE THAT **PROGRAMMATIC DIGITAL OUT-OF-HOME** IS IMPORTANT FOR PERFORMANCE-LED CAMPAIGNS



German advertisers consider social media to be a natural fit to complement prDOOH in both brand (79%)<sup>15</sup> and performance (78%)<sup>16</sup> campaigns. This is unsurprising given the broad reach that both social media and prDOOH can deliver, making them a powerful duo to maximise the reach and frequency of a brand's campaign messaging.

**“The technical infrastructure in prDOOH allows the link between different media channels. The goal is to generate multiple contacts to increase the advertising impact and create synergies between prDOOH and e.g. CTV, mobile or social”**

ROBERT SAGEBAUM, EXPERT LEAD PROGRAMMATIC, GROUPM

Many may also use display ads (78%) alongside prDOOH in a performance context and search (79%) to supplement brand-based prDOOH activations.<sup>15/16</sup>



15. D2: Thinking about brand-led campaigns, which channels would you consider running programmatic digital out-of-home alongside?

16. D1: Thinking about performance-led campaigns, which channels would you consider running programmatic digital out-of-home alongside?

# WHAT CHALLENGES DO ADVERTISERS IN GERMANY NEED TO OVERCOME IN ORDER TO UNLOCK THE FULL POTENTIAL OF PROGRAMMATIC DIGITAL OUT-OF-HOME?



According to the research, the biggest challenge facing German advertisers with prDOOH is cross-channel measurement. A number of advertisers are having difficulty determining the value of prDOOH in cross-channel campaigns, and quantifying its value compared to DOOH and traditional OOH. In some cases, this is slowing adoption, as advertisers need to understand the ROI they receive from the channel in order to justify the price premium attached to prDOOH.

As a result, German advertisers want to see more concrete data that proves the value of prDOOH (35%)<sup>17</sup> and standardisation in KPIs and measurement techniques (48%)<sup>18</sup>. This will help them to determine the channel's true value and gain better visibility of how prDOOH affects other digital channels.



17. C8: Which of the following would you like to see in order to give programmatic digital out-of-home campaigns more value and make you invest more?

18. D4: Which, out of the following, would help you learn more about programmatic digital out-of-home advertising?

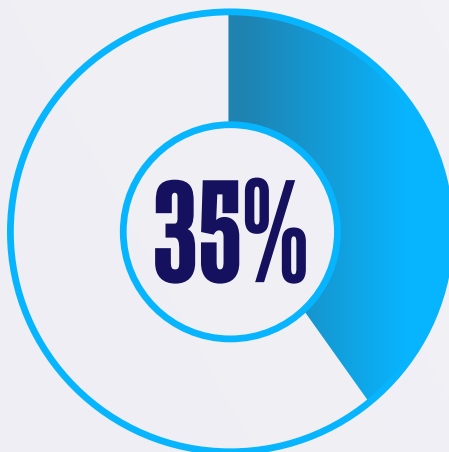
Historically, German advertisers have been interested in more options around precision/targeting (51% in 2021 vs 30% in 2023), more audience data (42% in 2021 vs 28% in 2023) and data to drive direct response (44% in 2021 vs 27% in 2023). Over the years, German advertisers have become less concerned with learning about how prDOOH fits within an omni-channel campaign (60% in 2020 vs 37% in 2023), information on cross-channel measurement (53% in 2020 vs 35% in 2023) and training on the benefits of prDOOH (52% in 2020 vs 38% in 2023). Interest in sector-specific insights and standardisation of measurement techniques have persisted over time.

**“On the one hand, the initial costs of prDOOH campaigns are typically higher due to the use of tech and data compared to traditional OOH or DOOH implementations. On the other hand, we can achieve greater efficiency by using the advantages of programmatic DOOH e.g. database and granular payout. This can be proven by a variety of measurement approaches, such as Brand Lift Studies, Footfall analysis, or Online Conversion Tracking”**

ROBERT SAGEBAUM, EXPERT LEAD PROGRAMMATIC, GROUPM

**WHICH OF THE FOLLOWING WOULD YOU LIKE TO SEE IN ORDER TO GIVE PROGRAMMATIC DIGITAL OUT-OF-HOME CAMPAIGNS MORE VALUE AND MAKE YOU INVEST MORE?**

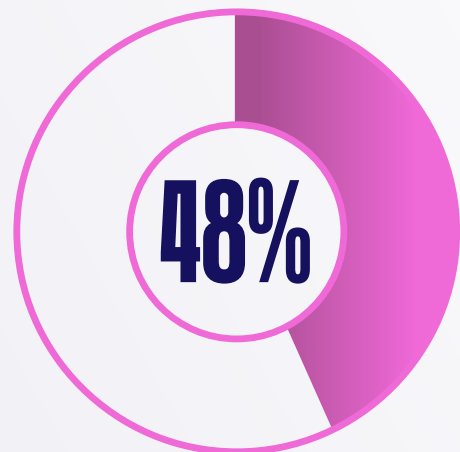
*MORE TANGIBLE METRICS AROUND THE CHANNEL TO DEMONSTRATE VALUE*



**% WHO AGREE  
WITH STATEMENT**

**WHICH, OUT OF THE FOLLOWING, WOULD HELP YOU LEARN MORE ABOUT PROGRAMMATIC DIGITAL OUT-OF-HOME ADVERTISING?**

*STANDARDS FOR PROGRAMMATIC IN DOOH*



**% WHO AGREE  
WITH STATEMENT**

Source: C8/D4 Base size DE (200)

**For more insights and to understand how Germany compares in the global prDOOH landscape, access the VIOOH State of the Nation 2023 Global White paper.**

# SAMPLE PROFILE

VIOOH partnered with research and strategy agency, MTM, to survey 1,200 advertisers and agencies across the US, UK, Australia, Germany, France, and Spain. Participants in this research are either joint or sole decision maker for advertising within their business, work at an agency or advertisers; and have already purchased prDOOH in the past 12 months, are planning to purchase it in the next 12 months or are digital buyers open to purchasing it.

Below is a breakdown of German participants based on various factors.

## PLEASE ESTIMATE YOUR ORGANISATION'S ANNUAL ADVERTISING BUDGET / BILLINGS AS OF 1ST JANUARY 2023



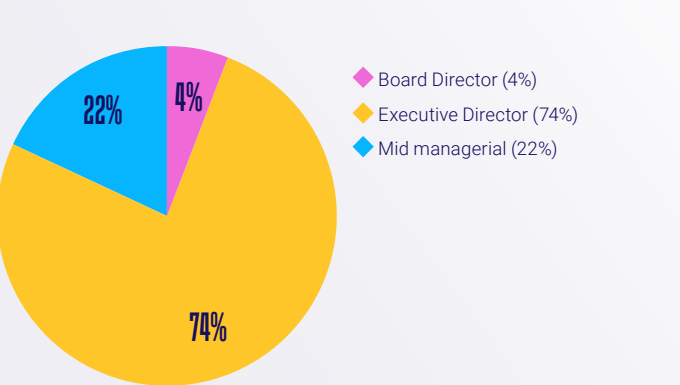
## WHAT COUNTRY DO YOU WORK IN?



## WHICH OF THE FOLLOWING BEST DESCRIBES THE SECTOR YOUR COMPANY / YOUR BIGGEST CLIENT IS IN?

Sector Net	Percentage
Retail, luxury, clothing, FMCG	28%
Tech, telco	16%
Food, drink, hospitality	14%
Finance, advertising, consulting	14%
Entertainment, gambling	10%
Automotive, transport	8%
Academic, gov, non-profit, healthcare	7%
Property, utilities	4%

## WHICH OF THE FOLLOWING, IF ANY, BEST DESCRIBES YOU?



## THINKING ABOUT YOUR ORGANISATION, WHICH ONE OF THE FOLLOWING BEST DESCRIBES IT?

