STATE OF THE NATION
Programmatic DOOH 2024

VIOOH

Australia market highlights

In partnership with mtm

Australia market highlights

EXECUTIVE SUMMARY

- Australia's digital out-of-home (DOOH) market is embracing programmatic buying, with nearly a **third (27%) of campaigns incorporating programmatic DOOH (prDOOH) over the last year.** This trend is expected to continue, with projections estimating that **35% of Australian campaigns will utilise prDOOH within the next 18 months**
- **prDOOH's targeting capabilities have been a key driver of its growth in Australia**. 71% of surveyed Australian marketers highlight prDOOH as the **most accurate channel for location targeting**, compared to 60% globally
- Australian marketers are **increasingly turning to programmatic platforms and DSP managed services for activating prDOOH campaigns.** The use of DSP managed services rose sharply in the year to date, reaching **44% of the market and marking a significant 25% increase from the previous year**
- Australian marketers are experimenting with Dynamic Creative Optimisation (DCO) to supercharge their prDOOH campaigns. Our survey reveals a staggering **95% are either exploring, testing, or actively implementing DCO**
- **Australia's prDOOH market is poised for significant growth,** as indicated by the 27% of marketers who plan to allocate new budgets specifically to programmatic buying in the next year (+12ppt YoY)

INTRODUCTION

VIOOH partnered with international research and strategy agency, MTM, to survey 1,200 advertisers and agencies across five key global markets — the US, UK, Australia, Germany, France, and an additional guest market, Brazil — to gain insights into the current state of prDOOH advertising.

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

This report focuses on findings specific to the Australian market.

WHAT IS THE CURRENT STATE OF prDOOH IN AUSTRALIA?

Australia's adoption of programmatic digital out-of-home (prDOOH) advertising mirrors global trends. Over the past 18 months, prDOOH has been integrated into 27% of Australian media plans, consistent with the global average[1]. This trend is expected to continue, with projections indicating prDOOH inclusion in 35% of media plans within the next 18 months, aligning with global forecasts[2].

While the majority of Australian marketers split incorporating prDOOH between the initial planning (34%) and activation (43%) phases (+13 ppt YoY), a shift is underway. Marketers are increasingly embracing prDOOH's flexibility by deciding to include prDOOH later in the campaign's lifecycle, including during the initial analysis and optimisation of live campaigns (+8 ppt YoY)[3].

This trend highlights the growing recognition of prDOOH's ability to provide real time insights and activate with relatively short notice, enabling marketers to make data-driven decisions and optimise campaigns on the fly.

35%

OF MEDIA PLANS IN AUSTRALIA OVER THE NEXT 18 MONTHS WILL INCLUDE prDOOH

WHILE PLANNING A CAMPAIGN, WHEN IN THE MEDIA PLANNING PROCESS IS THE DECISION TO INCLUDE PROGRAMMATIC DIGITAL OUT-OF-HOME TYPICALLY HAPPENING?

11%	34%	43%	14%
While deciding overall campaign strategy and objectives	While planning the media and allocating the budget	While buying the media and activating the campaign	While analysing and optimising campaign performance

Source: C12 Base Size: AU (200)

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

This versatility is further underscored by prDOOH's widespread adoption across both performance and brand-led campaigns in Australia.

Notably, prDOOH ranks as a top channel for both, securing the top spot for performance-led campaigns (92%)[4] and a close second for brand-led campaigns (86%), only slightly behind social media (88%)[5].

In fact, Australian marketers recognise distinct advantages of prDOOH, citing four key benefits, two of which differ from those identified globally[6]:

THIS WAS A UNIQUE FACTOR IN AUSTRALIA VS THE GLOBAL TRENDS

Enhanced targeting
Unlike traditional OOH formats, prDOOH empowers advertisers with precise targeting capabilities. Through real-time bidding and data-driven insights, prDOOH allows marketers to reach specific audience segments at optimal times and locations, maximising the relevance and impact of their campaigns (71% prDOOH vs. 59% DOOH vs. 47% OOH).

Sustainable and eco-efficient reach
PrDOOH is only activated when a relevant audience is present or predefined trigger criteria are met, maximising efficiency compared to DOOH and traditional OOH (65% prDOOH vs. 57% DOOH vs. 51% OOH).

THIS FACTOR WAS IDENTIFIED IN THE TOP 3 IN AUSTRALIA AND THE US ONLY

Establishing trust with target consumers
By delivering relevant, timely messages in contextually appropriate environments, prDOOH can foster trust with consumers, reinforcing the idea that the brand is present when needed. Its non-intrusive presence in public spaces further enhances brand credibility and contributes to a positive perception (65% prDOOH vs. 62% DOOH vs. 50% OOH).

Dynamic creative capabilities
PrDOOH enables marketers to craft dynamic content tailored to specific audiences, contexts, and real-time conditions. This level of customisation allows brands to create impactful narratives that resonate with their target demographics, increasing engagement and driving conversions (65% prDOOH vs. 53% DOOH vs. 50% OOH).

4 B4: What channels do you see as important for performance-led campaigns?
5 B5: What channels do you see as important for brand-led campaigns?
6 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.

PLEASE CHOOSE ANY OF THE MEDIA YOU FEEL DELIVER AGAINST THESE ATTRIBUTES.

prDOOH DELIVERS AGAINST...

Australia

71% Delivering accurate location targeting

65% Sustainable / eco-efficient reach

65% Providing dynamic creative opportunities

65% Establishing trust / credibility with your target consumer

Global

63% Providing dynamic creative opportunities

62% Sustainable / eco-efficient reach

61% Flexibility / efficiency to display when the right conditions are met

Source: B1 Base size: Total (1200), AU (200)

It's clear that Australia is embracing the innovative potential of prDOOH, with marketers captivated by the channel's flexibility and creativity. In fact, a huge 92% now see prDOOH as providing the most innovative opportunities of all advertising channels (+12ppt YoY)[7].

92%

NOW SEE

prDOOH AS PROVIDING THE MOST INNOVATIVE OPPORTUNITIES OF ALL ADVERTISING CHANNELS

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

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WHAT ARE THE KEY prDOOH TRENDS IN AUSTRALIA?

1 AUSTRALIAN MARKETERS ARE LEANING INTO prDOOH'S TARGETING CAPABILITIES

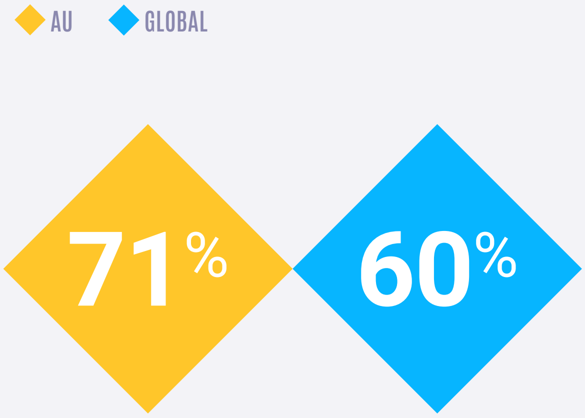
A significant majority (71%) of Australian marketers believe prDOOH advertising offers the most precise location targeting of all advertising channels. This confidence in prDOOH's targeting capabilities is notably higher in Australia than in any other market, exceeding the global average of 60%[9].

This emphasis on location-based targeting likely stems from Australia's geographically diverse population. By pinpointing specific areas with high concentrations of their target audience, prDOOH can help marketers reach the right people at the right time, maximising overall campaign effectiveness.

Australian marketers also prioritise prDOOH's ability to connect with their audience at precisely the right contextual moments.

A notable 69% of marketers highlighted that trigger-based buying capabilities, such as responding to events, news, or promotions, were the most influential factor in determining their investment in programmatic DOOH. This represents a substantial year-over-year increase of 16 percentage points, underscoring the growing importance of contextually relevant advertising in the Australian market[10].

prDOOH DELIVERS ACCURATE LOCATION TARGETING



Source: 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.
Base size: Global (1200), AU (200)

The ability to apply targeting selectivity is prDOOH's superpower: to focus on a certain audience cohort, whether incremental, high-value, in-market or proximity-based, building frequency of message amongst that audience in specific areas.

MICHAEL WHITESIDE
CHIEF MEDIA ACTIVATIONS OFFICER,
KINESSO, AUSTRALIA

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.
10 C13: How important are the following in determining your investment in programmatic digital out-of-home?

2 AUSTRALIAN MARKETERS EMBRACE NEW BUYING METHODS

The demand for flexibility in campaign buying and activation is shaping the Australian DOOH landscape, influencing choices across buying channels, methods, and deal types.

While direct-only DOOH buys have seen an +11 percentage points increase in the year-to-date (now at 45%), the greater surge of +12 percentage points in programmatic-only buys, now at 47%[11], combined with an increase in hybrid approaches (+9ppt increase to 41% in 2024), demonstrates a growing preference for the flexibility and adaptability of programmatic buying methods.

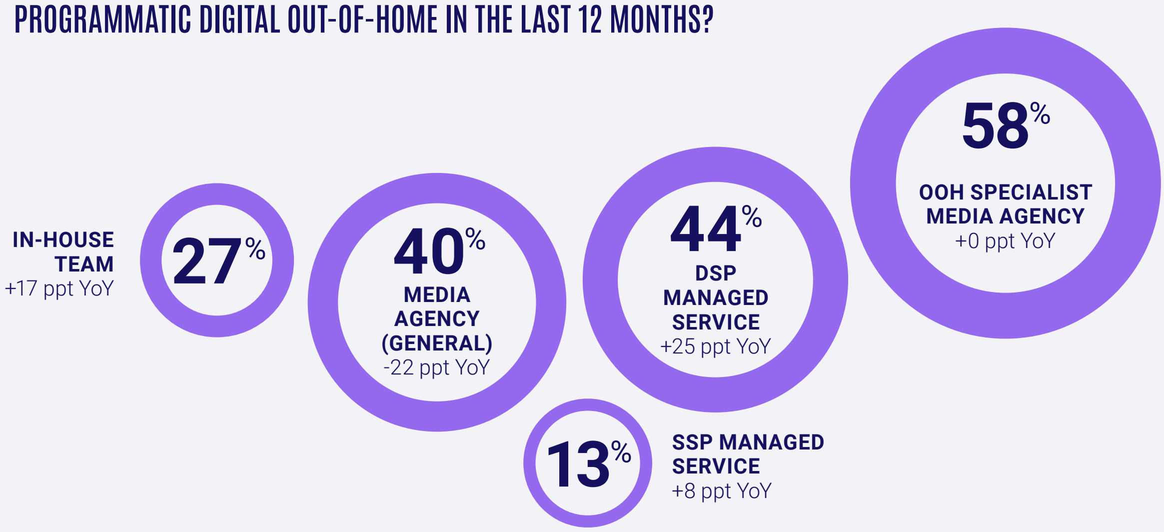
This emphasis on flexibility extends to the types of prDOOH deals Australian marketers prefer. Programmatic guaranteed (59%) is somewhat preferred over non-guaranteed (40%) deal types[12], offering advertisers an attractive combination of greater certainty and control over inventory and pricing.

The movement towards more adaptable prDOOH strategies is also reflected in the changing landscape of entities responsible for planning and buying prDOOH. Marketers are moving away from generalist agency models, opting for more control and agility in their prDOOH endeavours.

This is evident in the significant +25ppt year-on-year growth of DSP managed services, now used by 44% of marketers. This surge demonstrates a growing demand for the flexibility and control offered by programmatic self-serve platforms. Furthermore, the substantial rise in the use of in-house teams, from 9% to 27% (+17 percentage points year-over-year)[13], highlights an increasing preference for direct, internal management of prDOOH campaigns and alignment with other programmatic channels within a multi-channel strategy.

In contrast, reliance on general media agencies for prDOOH buying has fallen sharply, from 62% in 2023 to 40% in 2024[14]. When marketers do use agencies, they are turning to specialised partners who can offer tailored expertise and support.
As a result, OOH specialist agencies remain an important resource, with 58% of marketers continuing to utilise their services.

WHO HAS TYPICALLY BEEN RESPONSIBLE FOR PLANNING AND BUYING PROGRAMMATIC DIGITAL OUT-OF-HOME IN THE LAST 12 MONTHS?



Source: C1. Base size: all advertisers who place prDOOH 2024: AU (45); 2023: AU (76)

11 B11: In the past 12 months, how have your digital out-of-home campaigns typically been bought?
12, 13, 14 C1: Who has typically been responsible for planning and buying programmatic digital out-of-home in the last 12 months?

3 AUSTRALIAN MARKETERS EMBRACE THE POWER OF DCO

Many Australian marketers leverage prDOOH for its unparalleled dynamism and creative flexibility, with 65% identifying it as the leading channel for dynamic creative opportunities[15].

Given these advantages, it's unsurprising that 95% of surveyed Australian marketers are embracing Dynamic Creative Optimisation (DCO), either through consideration, pilot programmes, or active integration[16]. This aligns with the global average, reflecting a widespread recognition of DCO's benefits, including enhanced creative agility and optimised ad spend.

I have clients that have used DCO, and are using DCO, that are activating it addressably with prDOOH. This is definitely something that will grow as more and more case studies come out about the increased effectiveness of DCO addressable media within the prDOOH space.

KATHERINE POCHROJ
SYDNEY HEAD OF MEDIA SOLUTIONS & INVESTMENT, ESSENCEMEDIACOM, GROUPM, AUSTRALIA

The ability to customise communication [with DCO] based on user motivations or environmental triggers adds relevance when in context – especially location, to direct traffic to certain stores and locations.

MICHAEL WHITESIDE,
CHIEF MEDIA ACTIVATIONS OFFICER,
KINESSO, AUSTRALIA

Three key benefits of DCO, consistent with those identified globally, are driving its adoption in Australia[17]:

Creative flexibility
DCO allows advertisers to easily tailor creative assets to specific audiences, locations, or real-time conditions, ensuring maximum relevance and engagement (47% vs. 42% global).

Improved relevance
By delivering content and messaging that resonates with viewers in the moment, DCO significantly boosts campaign relevance and impact (47% vs. 40% global).

Optimised ad spend
By delivering content tailored to specific audiences DCO optimises ad spend, focusing on those most likely to engage with a product or brand (44% vs. 38% global).

15 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.
16 D7: Do you currently integrate Dynamic Creative Optimisation (DCO) into your programmatic digital out-of-home advertising?
17 D9: Which, if any, of the following potential benefits can Dynamic Creative Optimisation (DCO) offer for programmatic digital out-of-home advertising?

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WHICH OF THE FOLLOWING, IF ANY, ARE PREVENTING YOU FROM ADOPTING DYNAMIC CREATIVE OPTIMISATION (DCO) FOR PROGRAMMATIC DIGITAL OUT-OF-HOME ADVERTISING?

54%

Lack of understanding / confidence in the technology to execute the creative play out correctly

53%

Budgetary constraints for implementing DCO campaigns

50%

Training on the possibilities of DCO campaigns

Source: D8 Base Size: AU (200)

Despite the growing enthusiasm for DCO, some hurdles remain. Australian marketers cite a lack of understanding of the technology (54%), budgetary constraints (53%), and limited training on DCO's possibilities (50%) as the primary barriers to adoption[18].

However, with increasing investment in prDOOH and ongoing education about DCO's capabilities, we anticipate a steady rise in DCO adoption. As marketers become more familiar with the technology and its potential to optimise campaigns, these barriers are expected to diminish, further accelerating the integration of DCO into mainstream marketing strategies.

95%

OF AUSTRALIAN MARKETERS ARE **CONSIDERING PILOTING, OR ACTIVELY INTEGRATING DCO INTO THEIR CAMPAIGNS**

Some clients will be deterred by the hard production cost [associated with DCO], but there have been a lot of advancements in the technology to reduce those costs.

KATHERINE POCHROJ
SYDNEY HEAD OF MEDIA SOLUTIONS & INVESTMENT,
ESSENCEMEDIACOM, GROUPM, AUSTRALIA

18 D8: Which of the following, if any, are preventing you from adopting Dynamic Creative Optimisation (DCO) for programmatic digital out-of-home advertising?

WHAT IS THE FUTURE OUTLOOK FOR prDOOH IN AUSTRALIA?

Australian marketers are doubling down on prDOOH advertising, with investments projected to increase by an average of 28% over the next 18 months[19].

This optimistic outlook is further reinforced by a significant 12 percentage points year-over-year rise in marketers planning to allocate new budgets specifically for prDOOH campaigns (27%)[20].

I think with MOVE 2.0, OMA, and the Australian outdoor industry coming together on measurement, Australia is one of the most, if not the most, advanced market in the world. [Especially when it comes to] having that common currency for out-of-home measurement, which will only be strengthened by MOVE 2.0.

KATHERINE POCHROJ
SYDNEY HEAD OF MEDIA SOLUTIONS & INVESTMENT, ESSENCEMEDIACOM, GROUPM, AUSTRALIA

From a comms planning perspective, [growth will come from] familiarising programmatic teams with the role of the channel and also familiarising traditional teams with what's possible in-platform and the versatility of programmatic.

MICHAEL WHITESIDE,
CHIEF MEDIA ACTIVATIONS OFFICER, KINESSO, AUSTRALIA

27%

OF AUSTRALIAN MARKETERS ARE

ADDING NEW BUDGETS SPECIFICALLY FOR prDOOH

19 B7: How do you think your advertising investment in the following media will change in the next 18 months?
20 C5: If the budget is going to be increased for programmatic digital out-of-home, where is this budget being moved from?

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

59%
Training on benefits of programmatic in DOOH

57%
Sector-specific insights for prDOOH

55%
Standards for programmatic in DOOH

Source: D4 Base Size: AU (200)

To sustain and accelerate the current growth trajectory of prDOOH in Australia, marketers are seeking a deeper understanding of the technology and its potential. They have expressed a desire for comprehensive training on prDOOH's benefits (59%), sector-specific insights to tailor their campaigns (57%), and standardised practices for programmatic DOOH to ensure consistency and transparency (55%)[21].

Beyond educational resources, marketers are also demanding enhanced targeting capabilities to unlock the full value of prDOOH and potentially increase their investments. This includes a greater availability of audience data (37%) and more granular buying options, such as the ability to purchase packages aligned with specific verticals or seasons (37%) and to target specific environments like airports or malls (37%)[22].

By addressing these needs, the industry can empower marketers to harness the full potential of prDOOH and drive continued growth in this dynamic advertising channel.

There is definitely still a job to be done in the market on continued education from our partners and having a really clear proposition of the role of programmatic out-of-home because that's what's going to be really vital for growth.

KATHERINE POCHROJ,
SYDNEY HEAD OF MEDIA SOLUTIONS & INVESTMENT,
ESSENCEMEDIACOM, GROUPM, AUSTRALIA

21 D4: Which, out of the following, would help you learn more about programmatic digital out-of-home advertising?
22 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?

CONCLUSION

Australia serves as a prime example of the surging demand for prDOOH advertising. Marketers are drawn to its flexibility, audience relevance, and optimised ad revenue potential. Notably, Australian advertisers are leveraging prDOOH's advanced targeting capabilities to deliver highly relevant and dynamic ads across the market.

The country is at the forefront of experimenting with various programmatic buying methods, including a growing reliance on DSP managed services and in-house teams. To sustain this momentum, Australian marketers require more education about prDOOH's full range of capabilities, access to richer audience data, and even more refined targeting options. As these challenges are addressed, the widespread adoption of prDOOH is expected to accelerate across the Australian market.

For more insights and to explore how Australia compares within the global prDOOH landscape, access the VIOOH State of the Nation 2024 Global White paper **HERE**.

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AUSTRALIA SAMPLE PROFILE

SIZE OF ADVERTISING BUDGET

44%
Under
A$1.5m

25%
Between
A$1.5m and A$7m

14%
Between
A$7m and A$28m

14%
Between
A$28m and A$200m

4%
Over
A$200m

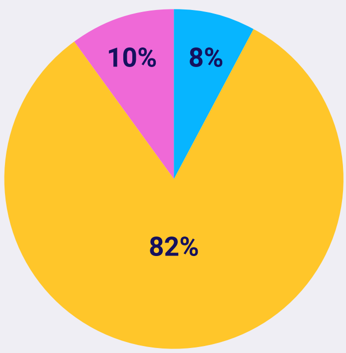
COUNTRY

N=200

SECTOR

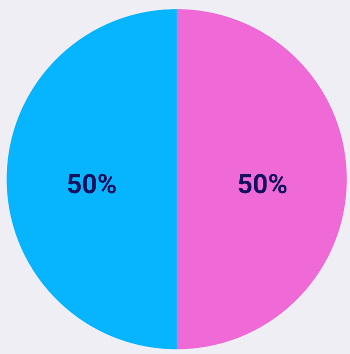
Sector Net	Percentage
Retail, luxury, clothing, FMCG/CPG	26%
Food, Drink, Hospitality	22%
Finance, advertising, consulting	13%
Academic, gov, non-profit, healthcare	11%
Property, utilities	10%
Entertainment, gambling	8%
Tech, telco	7%
Automotive, transport	7%

MANAGERIAL RESPONSIBILITY



Board Director (10%)
Executive Director (82%)
Mid managerial (8%)

ORGANISATION TYPE



Advertiser (50%)
Media Agency (50%)