STATE OF THE NATION
Programmatic DOOH 2024

VIOOH

Germany market highlights

In partnership with

mtm

Germany market highlights

EXECUTIVE SUMMARY

- **German marketers are embracing programmatic digital-out-of-home in their campaigns, with an average of 25% of campaigns utilising it over the past 18 months.** This upward trend is set to continue, with 33% of media plans expected to include prDOOH in the next 18 months

- This growing confidence in prDOOH is further reflected in the allocation of resources, with **21% of marketers planning to dedicate new budgets to the medium in the coming year**

- **German marketers are increasingly leveraging prDOOH's dual capabilities, recognising it for both performance-driven (90%) and brand-led (86%) campaigns.** The notable 10 percentage point year-over-year increase in prDOOH's recognition for brand building underscores its growing versatility and effectiveness across a wide range of marketing objectives

- Germany leads all surveyed markets in recognising the creative potential of Dynamic Creative Optimisation (DCO) for prDOOH campaigns, with an impressive **97% of marketers either considering, testing, or actively integrating it into their campaigns, compared to 95% globally**

- Demand-side platforms's managed services (DSPs) are becoming increasingly important in the German prDOOH landscape, with their usage in **planning and buying surging to 46% - a huge 24 percentage point increase year-over-year**

- To justify further investment and fully realise prDOOH's potential, German marketers are calling for **more tangible metrics and richer data sets,** including proximity data and insights that can directly drive measurable results

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 market highlights specific to the German market.

STATE OF THE NATION
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WHAT IS THE CURRENT STATE OF prDOOH IN GERMANY?

Over the past 18 months, the adoption of programmatic digital out-of-home (prDOOH) in Germany has mirrored global trends, with an average of 25% of campaigns incorporating it, slightly below the global average of 27%[1].

However, prDOOH is poised for significant growth in Germany, with projections indicating a notable increase in its inclusion within media plans. The average campaign inclusion rate is expected to rise to 33% over the next 18 months, highlighting the growing recognition of prDOOH's value and potential within the German advertising landscape[2].

The German DOOH market is undergoing a shift towards programmatic buying, driven by its efficiency, targeting capabilities, and flexibility. This is evident in the remarkable 15 percentage point year-over-year increase in programmatic-only purchases, now accounting for 48% of all DOOH campaigns purchased in the past 12 months. This surge has nearly closed the gap with direct DOOH buys (52%), indicating a growing preference among marketers for programmatic solutions[3].

This shift is likely fuelled by the strong preference for programmatic guaranteed deals, chosen by 67% of marketers (+16ppt YoY) compared to 37% (+7ppt YoY) for non-guaranteed deals. Programmatic guaranteed deals offer advertisers greater certainty and control over inventory and pricing, making them an attractive option in a rapidly evolving market[4].

However, the evolution in the market is not solely towards a programmatic-only approach. A significant portion of German marketers (47%) are embracing hybrid strategies, combining programmatic and direct buys within their campaigns. This demonstrates a nuanced understanding among German marketers, who are leveraging the strengths of both methods to optimise their DOOH strategies[5]. Indeed, a balanced approach suggests a mature and evolving market where advertisers are strategically combining tools to achieve their specific campaign goals.

IN THE PAST 12 MONTHS, HOW HAVE YOUR DIGITAL OUT-OF-HOME CAMPAIGNS TYPICALLY BEEN BOUGHT?

USUALLY / ALWAYS

52% Campaigns through direct buys only

48% Campaigns though programmatic buys only

47% Campaigns with a mix of direct and programmatic buys

Source: B11 Base size: all respondents who buy DOOH or prDOOH DE (160). Please note verticals do not equal 100% due to buying methods rated separately on a 5pt scale from 'Never' to 'Always' allowing for overlap of 'Usually/Always' responses.

33%

OF MEDIA PLANS IN GERMANY

WILL INCLUDE prDOOH IN THE NEXT 18 MONTHS

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?
4 B10: Of the following methods, which are your most preferred way(s) to buy programmatic advertising?
5 B11: In the past 12 months, how have your digital out-of-home campaigns typically been bought?

The innovative potential of prDOOH resonates strongly with German marketers, with an overwhelming 94% recognising it as the most innovative advertising solution available, a significant 9 percentage point increase from the previous year.

This figure surpasses even social media (90%) and traditional DOOH (84%)[6], highlighting the growing appreciation for prDOOH's advanced targeting, dynamic creative capabilities, and real-time optimisation.

Additionally, German marketers value the sustainability prDOOH offers, with more than half (57%) acknowledging programmatic DOOH as an eco-efficient buying method[7]. This aligns with Germany's broader cultural emphasis on environmental responsibility, further solidifying prDOOH's appeal in the market.

Compared to other channels, prDOOH is the winner in terms of sustainability. Thanks to granular targeting parameters and the reduction in wasted targeting as a result, prDOOH campaigns can be implemented as economically, efficiently, and environmentally sustainable as possible.

LAURA HENTSCHEL,
HEAD OF PROGRAMMATIC & DIGITAL MEDIA, IT WORKS, GERMANY

OF MARKETERS IN GERMANY BELIEVE

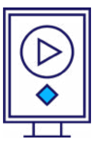
prDOOH OFFERS THE MOST INNOVATIVE ADVERTISING OPPORTUNITIES OF ALL MEDIA CHANNELS

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

German marketers recognise prDOOH's unique benefits compared to other out-of-home buying methods, highlighting three key advantages, two of which differed slightly from those identified globally[8]:

Strong brand safety
prDOOH offers enhanced brand safety for marketers through location and contextual targeting capabilities, along with content safeguarding mechanisms. These features allow advertisers to carefully select where and when their ads are displayed, ensuring brand messages align with appropriate environments and audiences (64% prDOOH vs. 58% DOOH vs. 51% OOH).

Enhanced targeting
Unlike static billboards, 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 (64% prDOOH vs. 58% DOOH vs. 49% 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 (62% prDOOH vs. 58% DOOH vs. 59% OOH). This feature was also recognised as a key benefit by marketers globally.

[With prDOOH] you have really narrow contexts, so you can focus on KPIs that are important to you and important for the advertiser. You minimise the potential of losing valuable contacts and paying for impressions that do not match your campaign goals.

BRITTA CIFTCIOGLU
DIRECTOR PLANNING & DEVELOPMENT OOH, GROUPM, GERMANY

8 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.

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WHAT ARE THE KEY prDOOH TRENDS IN GERMANY?

1 THE USE OF prDOOH FOR BRAND-LED CAMPAIGNS IS INCREASING IN GERMANY

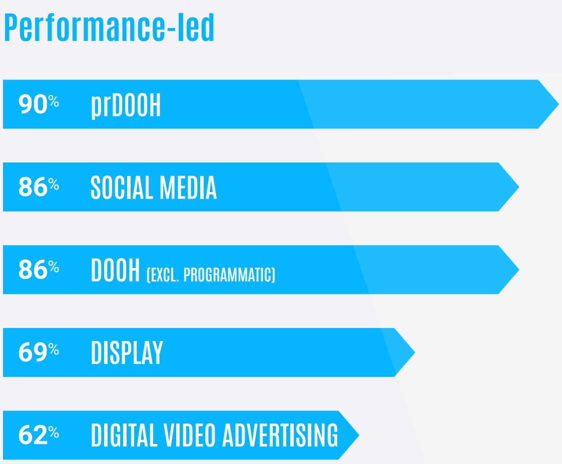
The success of prDOOH in Germany is driven in part by its proven ability to deliver results across both performance and brand-led campaigns. German marketers recognise prDOOH's importance for performance-led initiatives (90%)[9], reflecting a growing recognition of prDOOH's versatility.

The growing reliance on prDOOH for brand building in Germany aligns with global trends, underscoring the channel's effectiveness in boosting brand awareness and engagement.

Notably, German marketers now rank prDOOH as the most important channel for brand-led campaigns (86%) up from 76% in 2023, and surpassing social media (85%) and traditional DOOH (83%)[10]. This indicates a growing preference for prDOOH's dynamic capabilities and targeted reach in building brand equity.

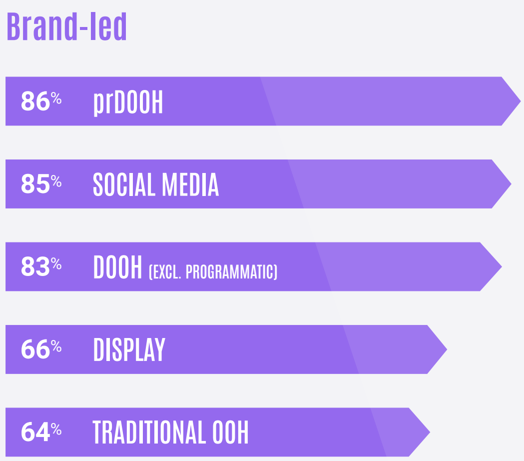
WHAT CHANNELS DO YOU SEE AS IMPORTANT FOR PERFORMANCE-LED CAMPAIGNS?

TOP 5 CHANNELS



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

TOP 5 CHANNELS



Source: 84/85 Base size DE (200)

9 B4: What channels do you see as important for performance-led campaigns?\
10 B5: What channels do you see as important for brand-led campaigns?

2 GERMAN MARKETERS ARE INCREASINGLY INCORPORATING DCO INTO THEIR prDOOH CAMPAIGNS

In Germany, marketers are embracing the creative potential of DCO for prDOOH campaigns more than any other surveyed market. This is evidenced by the fact that nearly all surveyed marketers (97%) are either considering, testing, or actively integrating DCO into their campaigns, compared to 95% globally[11]. This heightened interest in DCO likely stems from a desire to leverage its ability to create personalised, contextually relevant ads that resonate with specific audiences, ultimately driving greater engagement and ROI.

Despite the growing enthusiasm for DCO in Germany, budgetary constraints (44%) continue to pose a barrier to wider implementation, and marketers express a desire for a deeper understanding of DCO's capabilities (49%)[12].

Additionally, despite positive perceptions of prDOOH's brand safety benefits, marketers seek further assurances and guarantees around the safety of DCO before committing to investment (49%)[13].

Nevertheless, the role of DCO in Germany is expanding rapidly. The number of marketers planning to utilise DCO in prDOOH campaigns has increased significantly from 60% to 70% year-over-year[14].This growth trajectory, combined with the expected easing of budgetary constraints and increased education on DCO's capabilities, suggests a promising future for DCO integration in the German prDOOH landscape.

[DCO] is one of the most exciting aspects in programmatic digital out-of-home, because of the fact that a campaign adapts based on data that is relevant for the advertiser and in the end gives greater value for the relevant audience.

BRITTA CIFTCIOGLU
DIRECTOR PLANNING & DEVELOPMENT OOH, GROUPM, GERMANY

OF GERMAN MARKETERS ARE

CONSIDERING,TESTING, OR ACTIVELY INTEGRATING DCO INTO THEIR CAMPAIGNS

DCO is a regular component of our prDOOH campaigns. For us, DCO is important when campaigns need to reach the target group in a unique and data-driven way and the messages need to offer the viewer exceptional added value. The use of DCO... also demonstrably increases the viewer's attention many times over.

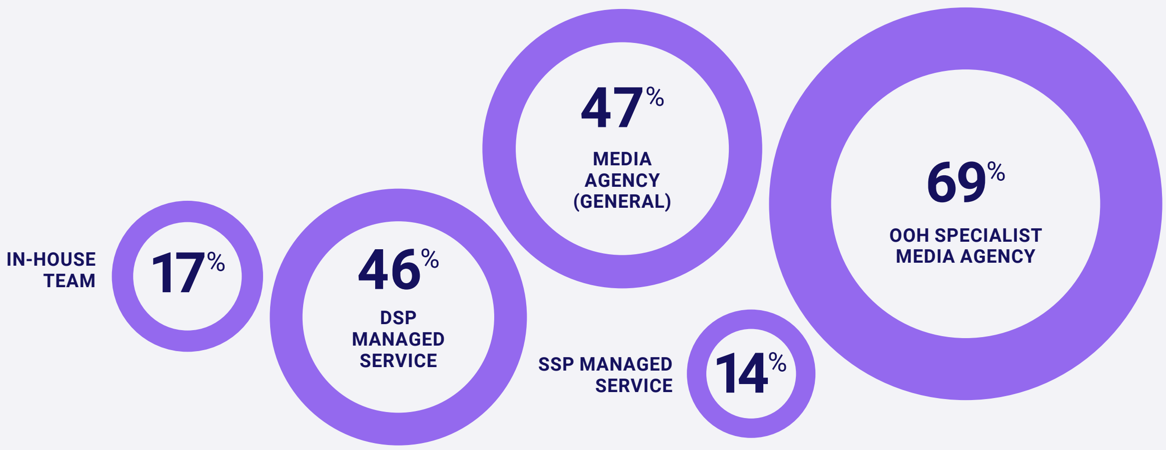
LAURA HENTSCHEL,
HEAD OF PROGRAMMATIC & DIGITAL MEDIA, IT WORKS, GERMANY

11 D7: Do you currently integrate Dynamic Creative Optimisation (DCO) into your programmatic digital out-of-home advertising?
12 D8: Which of the following, if any, are preventing you from adopting Dynamic Creative Optimisation (DCO) for programmatic digital out-of-home advertising?
13 D8: Which of the following, if any, are preventing you from adopting Dynamic Creative Optimisation (DCO) for programmatic digital out-of-home advertising?
14 C14: Thinking about how you expect to place, plan, or buy programmatic digital out-of-home advertising in the next 18 months, to what extent do you agree or disagree with the following statements?

3 THE ROLE OF DSPs IS EXPANDING IN GERMANY

German marketers are increasingly diversifying their approach to planning and buying prDOOH campaigns. While specialist OOH media agencies remain a key resource utilised by 69% of marketers[15], the role of demand-side platform managed services (DSPs) has grown substantially. Now, 46% of marketers leverage DSPs' managed service for prDOOH, a notable 24 percentage point increase year-over-year[16]. This aligns with a broader global trend towards greater DSP adoption in the prDOOH space.

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 DE (70).

The growing prominence of DSPs in the German market indicates a shift towards audience-based buying strategies, where marketers prioritise reaching specific demographics across multiple media owners rather than focusing on individual placements.

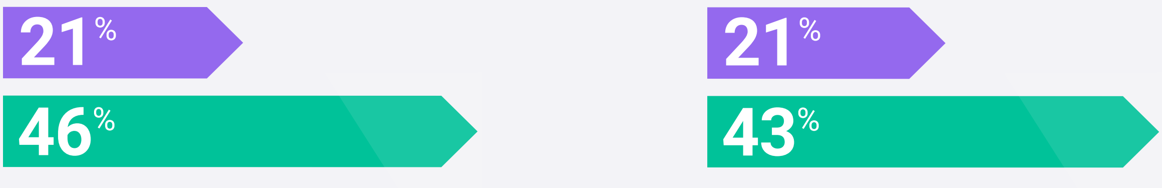
15 & 16 C1: Who has typically been responsible for planning and buying programmatic digital out-of-home in the last 12 months?

% YEAR-ON-YEAR INCREASE IN THE USE OF DSP MANAGED SERVICES, GERMANY VS GLOBAL.

2023 2024

% PARTICIPANTS SELECTING DSP MANAGED SERVICE IN:

Germany | Global Across core markets



Source: C1. Who has typically been responsible for planning and buying programmatic digital out-of-home in the last 12 months?
Base size: 2023: Total (421) and 2024: Total (287).

Moreover, the ability of DSPs to consolidate buying across various channels (display, social, DOOH etc.) suggests that German marketers are increasingly incorporating prDOOH into their multi-channel strategies, leveraging its unique capabilities to complement and amplify other digital campaigns.

prDOOH is now a regular feature that is appreciated in campaigns with individual requirements as well as in combination with other channels, no matter if it is handled via single or multi-channel DSPs. Based on the technical options and the flexibility within programmatic buying in OOH, planning becomes more transparent and can be handled short-term as well as always-on without starting a whole new campaign planning process. The platforms and the insights that are generated play an important role for future planning concepts.

BRITTA CIFTCIOGLU
DIRECTOR PLANNING & DEVELOPMENT OOH, GROUPM, GERMANY

WHAT IS THE FUTURE OUTLOOK FOR prDOOH IN GERMANY?

The growth of prDOOH in Germany is projected to continue, with marketers planning an average increase in investment of 24% over the next 18 months[17]. This growth aligns with the global average (28%), though slightly lower due to prDOOH's already established position in the German market.

This growing demand has influenced budget allocations, with 67% of German marketers shifting budgets away from traditional channels (including traditional OOH) towards prDOOH[18] - a significantly larger shift than the global average (59%)[19].

German marketers are also moving budget away from digital channels (83%) including DOOH, in line with the global average (83%). In line with the other core markets, the budget for prDOOH coming from DOOH and OOH is likely because advertisers who have used prDOOH previously now consider prDOOH their "new normal".

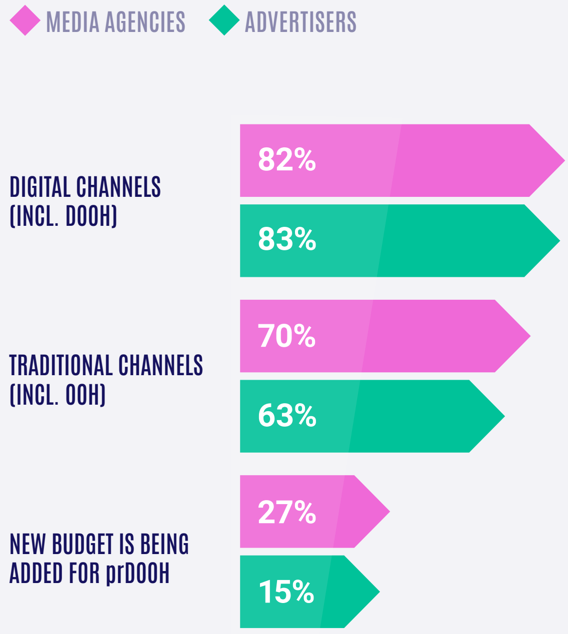
Year-over-year growth in dedicated prDOOH budgets since 2023 is also substantial (21%, a jump of 12 percentage points)[20]. This growth signifies a clear acknowledgement of the increasing value that prDOOH offers within the German advertising market.

Interestingly, it is agencies (27%) rather than advertisers (15%) who are primarily driving the creation of these new, dedicated prDOOH budgets, suggesting that agencies are actively pushing prDOOH to their clients.

There is still a wide knowledge gap in the market, on the client and agency side as well as among providers… building knowledge of programmatic is essential in order for clients to become more open to prDOOH. I see this as the duty of agencies or specialist intermediaries to guide their customers in the best possible way and introduce them to the medium.

LAURA HENTSCHEL,
HEAD OF PROGRAMMATIC & DIGITAL MEDIA, IT WORKS, GERMANY

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



Source: C5 Base size: Media agency (100), Advertiser (100). Digital channels include DOOH and other digital channels. Traditional channels include OOH and other traditional channels.

ADVERTISERS PLAN TO INCREASE SPEND IN PROGRAMMATIC DIGITAL OUT-OF-HOME
BY AN AVERAGE OF 24%
OVER THE NEXT 18 MONTHS

17 B7: How do you think your advertising investment in the following media will change in the next 18 months?
18, 19, 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?

49% Clearer understanding of how prDOOH fits within an omnichannel campaign

49% Training on benefits of programmatic in DOOH

47%
- Information on how to measure ROI of prDOOH
- Sector-specific insights
- Best practices for using data for activation of prDOOH

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?

38% More tangible metrics around the channel to demonstrate value

37% Proximity data (e.g. airport gate locations)

36% More data to drive direct response (e.g. cross channel measurement)

Source: D4/CB Base Size: DE (200)

To sustain this growth and effectively onboard the increasing number of newcomers to the channel, German marketers are seeking further education and resources to enhance their prDOOH expertise. Nearly half (49%)[21] desire comprehensive training on the benefits of prDOOH, while 38% request more tangible metrics for campaign evaluation[22].

Beyond education and standardisation, German marketers are seeking enhanced capabilities in proximity data for precise targeting and tracking (37%), as well as improved direct response measurement tools (36%) to better evaluate prDOOH's impact on consumer behaviour and sales. Addressing these needs will be essential for fostering continued adoption and success of prDOOH campaigns in the German market.

As soon as the campaign goals show a perfect start for a prDOOH planning, the challenge is to underline why it is effective – more insights and studies that highlight the effectiveness of prDOOH will help advertisers and agencies to understand why they should spend advertising budget in this channel.

BRITTA CIFTCIOGLU
DIRECTOR PLANNING & DEVELOPMENT OOH, GROUPM, GERMANY

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

As an established prDOOH market, Germany demonstrates a growing demand for the channel, with marketers increasingly recognising its flexibility, creative potential, and precise targeting capabilities. This recognition translates into increased investment and a higher share of prDOOH in advertising campaigns.

To maintain growth momentum, German marketers are seeking a deeper understanding of DCO, additional resources to onboard newcomers and standardised measurement tools to effectively demonstrate prDOOH's effectiveness within multi-channel campaigns. By addressing these needs, Germany is poised to maintain its leadership position in the prDOOH landscape.

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

GERMANY SAMPLE PROFILE

SIZE OF ADVERTISING BUDGET

50%
Under
€1m

13%
Between
€1m and €5m

10%
Between
€5m and €20m

15%
Between
€20m and €150m

14%
Over
€150m

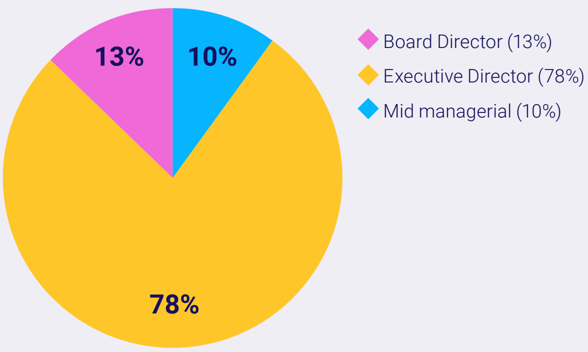
COUNTRY

N=200

SECTOR

Sector Net	Percentage
Retail, luxury, clothing, FMCG/CPG	35%
Food, Drink, Hospitality	12%
Academic, gov, non-profit, healthcare	11%
Tech, telco	11%
Finance, advertising, consulting	10%
Automotive, transport	10%
Entertainment, gambling	7%
Property, utilities	6%

MANAGERIAL RESPONSIBILITY



ORGANISATION TYPE