

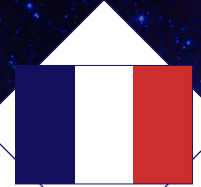
France market highlights



In partnership with



France market highlights



EXECUTIVE SUMMARY

- ◆ **French marketers are increasingly incorporating programmatic digital out-of-home (prDOOH) into their advertising strategies.** Over the past 18 months, an average of 26% of campaigns have utilised prDOOH, and this adoption rate is projected to grow to 36% in the next 18 months, reflecting prDOOH's rising popularity
- ◆ **French marketers are poised to significantly increase their prDOOH investments,** forecasting an average growth of 29% over the next 18 months, marking one of the highest anticipated increases globally
- ◆ While widely recognised for performance-led objectives (89%), prDOOH's value for brand-led campaigns has seen a significant uptick, rising 5 percentage points year-over-year. **Now, 84% of French marketers recognise prDOOH as a valuable asset for brand building**
- ◆ French marketers are **interested in the potential for Dynamic Creative Optimisation (DCO) in prDOOH campaigns, with 95% either considering, testing, or actively integrating DCO,** however, adoption is currently low with only 6% actively using it for their campaigns
- ◆ **Attention-based metrics are popular among French marketers (41% vs. 36% globally).** These metrics, along with sales uplift and performance in multi-channel campaigns, are key indicators of prDOOH success in France

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 French market.



WHAT IS THE CURRENT STATE OF prD00H IN FRANCE?



France boasts a mature digital out-of-home (DOOH) advertising market, with programmatic DOOH (prDOOH) playing a growing role.

Over the past 18 months, an average of 26% of campaigns in France incorporated prDOOH, mirroring the global average of 27%¹. However, France is poised to outpace this trend, with projections indicating a significant surge to 36% of campaigns utilising prDOOH in the next 18 months².

French advertisers are demonstrating a growing preference for programmatic buying for DOOH, driven by its flexibility, agility, and scalability. This is evident in the notable rise of programmatic-only purchases, with half of marketers (51%) now usually or always utilising this method, a substantial 23 percentage point increase from the previous year³.

Additionally, hybrid approaches, combining direct and programmatic buys, are gaining momentum, with 46% of marketers utilising this method, marking a 9 percentage point increase year-over-year. This blended approach now slightly outpaces direct-only buys (44%), indicating a growing appreciation for the strategic advantages of combining both methods.

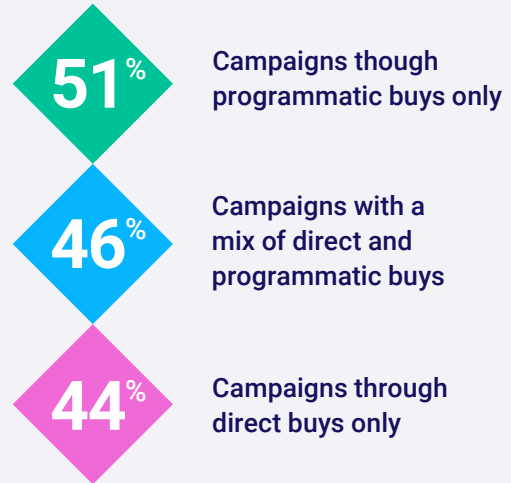
This hybrid model allows marketers to secure premium placements through direct buys while also leveraging the flexibility and targeting capabilities of programmatic to optimise reach and efficiency, and take advantage of last minute opportunities.

I think [prDOOH] is growing very fast. Our clients are more confident in activating prDOOH. They understand the pros and the cons of it and I think [prDOOH] will grow a lot more in the next 5-10 years.

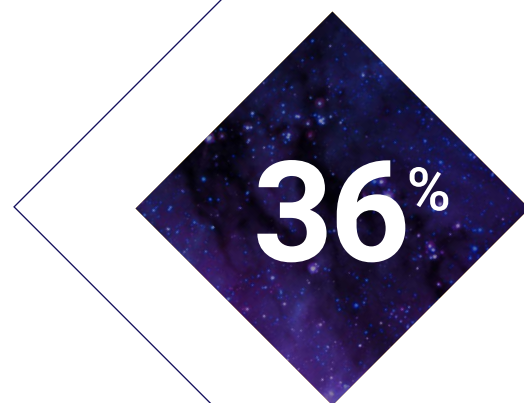
CHLOÉ RAUCH
SENIOR DISPLAY & PROGRAMMATIC CONSULTANT,
ARTEFACT, FRANCE

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

USUALLY / ALWAYS



Source: B11 Base size: all respondents who buy DOOH or prDOOH FR (154). 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.



OF MEDIA PLANS IN FRANCE
**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: 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?

The French prDOOH market is also witnessing a notable shift in buying preferences, with a growing appetite for flexibility and agility in campaign execution.

While programmatic guaranteed deals, which offer assured inventory at a fixed price, remain the preferred method (63%) among respondents who have purchased prDOOH in the past 12 months, there has been a significant 14 percentage point year-over-year increase in marketers utilising non-guaranteed deals, now accounting in 40% of campaigns⁴.

This surge in popularity can be attributed to several factors, including a desire for greater flexibility in inventory selection and pricing, as well as the ability to leverage real-time data to optimise campaign performance. By opting for non-guaranteed deals, marketers can access a wider range of inventory options and adjust their bids based on current market conditions, ultimately maximising their reach and impact.

French marketers are clearly embracing the innovative potential of prDOOH, with 92% now identifying it as the most innovative advertising solution available, up 3 percentage points from 2023⁵. This growing appreciation highlights the appeal of prDOOH's dynamic capabilities, such as real-time campaign adjustments, audience targeting, and creative optimisation, which collectively allow for more engaging and effective campaigns.

It is us [the agencies], who recommend activating programmatically because it is more flexible and I feel I have more control over my campaign.

CHLOÉ RAUCH
SENIOR DISPLAY & PROGRAMMATIC CONSULTANT,
ARTEFACT, FRANCE

If we want to do audience-based or something with a lot of innovation, like DCO triggering, programmatic is so much more interesting.

PAOLA EPOUMA MPEMBE
PROGRAMMATIC CONSULTANT,
HAVAS INTERNATIONAL PARIS

92%

OF MARKETERS IN FRANCE BELIEVE
**prDOOH OFFERS THE MOST
INNOVATIVE ADVERTISING
OPPORTUNITIES OF ALL
MEDIA CHANNELS**

⁴ B10: Of the following methods, which are your most preferred way(s) to buy programmatic advertising?
⁵ B6: Which of these media are developing the most innovative opportunities for advertisers?

French marketers perceive prDOOH as offering distinct advantages over other out-of-home buying methods, citing three key benefits. Two of these align with global trends, while the third is notably more important to the French market⁶:



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, increase engagement, and drive conversions (66% prDOOH vs. 59% DOOH vs. 57% 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. 54% DOOH vs. 55% OOH).



THIS WAS A UNIQUE
FACTOR IN THE
FRENCH MARKET VS
THE GLOBAL TREND



Ability to activate last minute media buys

Advertisers can quickly launch or adjust campaigns to capitalise on real-time events or changing conditions, maximising campaign relevance and impact (63% prDOOH vs. 57% DOOH vs. 50% OOH).

prDOOH's eco-efficiency is particularly valued by French marketers, who prioritise sustainability as a key factor in their future media investments (65% vs. 60% globally)⁷. This emphasis on sustainable advertising practices aligns with similar sentiments in the UK, Australia, and Brazil.

prDOOH's ability to minimise energy waste through targeted activation and optimised scheduling resonates strongly with French marketers seeking environmentally conscious solutions for their campaigns.

***We want to try to be as sustainable as possible...
[prDOOH] is obviously more sustainable as you are targeting multiple people at the same time, you are using less energy than one impression for one person.***

CHLOÉ RAUCH
SENIOR DISPLAY & PROGRAMMATIC CONSULTANT,
ARTEFACT, FRANCE

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.

⁷ C13: How important are the following in determining your investment in programmatic digital out-of-home?



WHAT ARE THE KEY prD00H TRENDS IN FRANCE?



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

French marketers are increasingly utilising prDOOH for diverse campaign objectives, demonstrating its versatility in driving both performance and brand-led initiatives. While prDOOH continues to be widely recognised for performance-led campaigns (89%)⁸, its importance for brand-led campaigns has grown significantly, increasing by 5 percentage points year-over-year to reach 84%⁹.

This surge in brand-led prDOOH campaigns has shifted the landscape of preferred channels for brand building. In 2023, social media (85%) and display advertising (83%) were the top choices, but in 2024, prDOOH has risen to equal prominence (84%), matching social media (84%) and DOOH (84%).

This shift indicates a growing recognition among French marketers of prDOOH's effectiveness in building brand awareness and engagement, alongside its proven performance capabilities.

[prDOOH] is not just about brand, it's about how data can bring a lot of granularity, all the synergies we can create that are useful for performance... [Many] see DOOH as just a branding tool, but [with prDOOH] we can go much further than that.

PAOLA EPOUMA MPEMBE
PROGRAMMATIC CONSULTANT,
HAVAS INTERNATIONAL PARIS

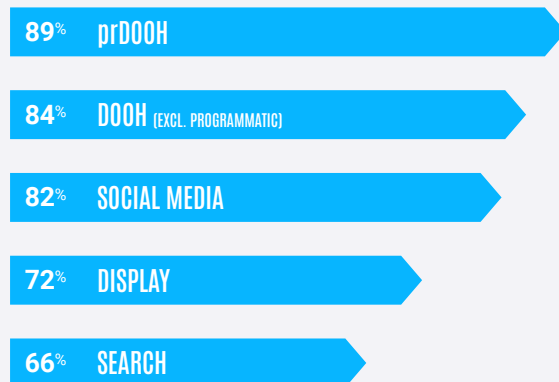
If you are activating only a DOOH campaign, it would be more impactful for brand, but if you have a full funnel activations [with prDOOH], it obviously has an impact on the performance as well.

CHLOÉ RAUCH
SENIOR DISPLAY & PROGRAMMATIC CONSULTANT,
ARTEFACT, FRANCE

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

TOP 5 CHANNELS

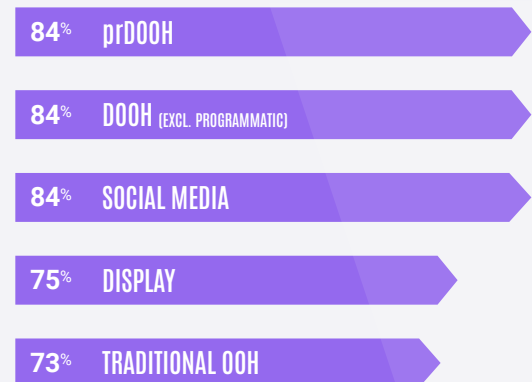
Performance-led



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

TOP 5 CHANNELS

Brand-led



Source: B4 / B5 Base size: FR (201)

2 DCO PRESENTS A KEY GROWTH OPPORTUNITY FOR prDOOH IN FRANCE

French marketers are increasingly recognising the creative potential of Dynamic Creative Optimisation (DCO) for prDOOH campaigns, with nearly all surveyed respondents (95%) expressing interest in exploring or implementing this technology¹⁰. This strong interest aligns with their recognition of dynamic creative capabilities as a key benefit of programmatic advertising.

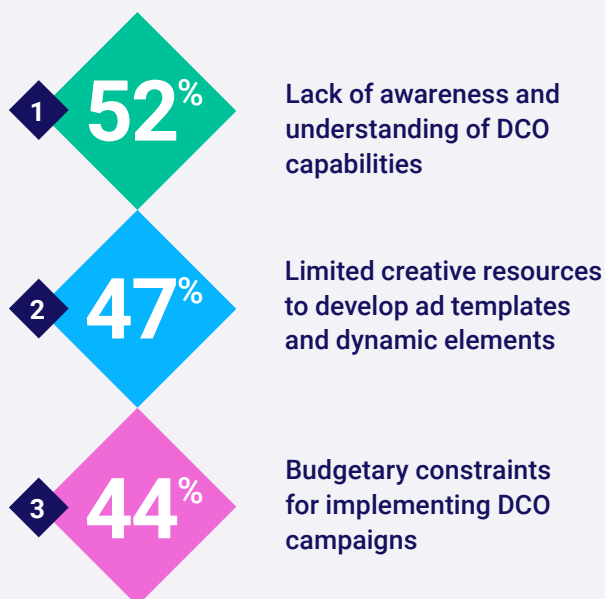
However, despite this enthusiasm, only 6% of marketers in France are currently actively using DCO for their prDOOH campaigns. Key barriers to adoption include a lack of awareness and education regarding DCO's capabilities (52%), limited creative resources for developing ad templates and dynamic elements (47%), and budgetary constraints (44%)¹¹.

Addressing these challenges is crucial for further prDOOH growth in France, as over half of French marketers (59%) consider the ability to use dynamic creative a key factor in their future prDOOH investment decisions¹².

By providing comprehensive education on DCO's benefits, offering more affordable solutions, and supporting creative development, the industry can unlock the full potential of DCO and drive greater adoption of prDOOH in the French market.

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

TOP 3 BARRIERS OF ADOPTION



Source: D8 Base size: all respondents who do not use DCO or consider using it in the future FR (106)

Clients know about [DCO], they're interested in it, but I don't see a lot of activations after we talk about it with them. Maybe there is a better job to do to reassure them on the technical part.

PAOLA EPOUMA MPEMBE
PROGRAMMATIC CONSULTANT,
HAVAS INTERNATIONAL PARIS

I think most clients need [DCO], but for luxury brands it is not really a thing right now. When people are seeing DCO strategy, they feel more close to the brand because they think the brand understands them and knows what they need.

CHLOÉ RAUCH
SENIOR DISPLAY & PROGRAMMATIC CONSULTANT,
ARTEFACT, FRANCE

10 D7: Do you currently integrate Dynamic Creative Optimisation (DCO) into your programmatic digital out-of-home advertising?

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

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

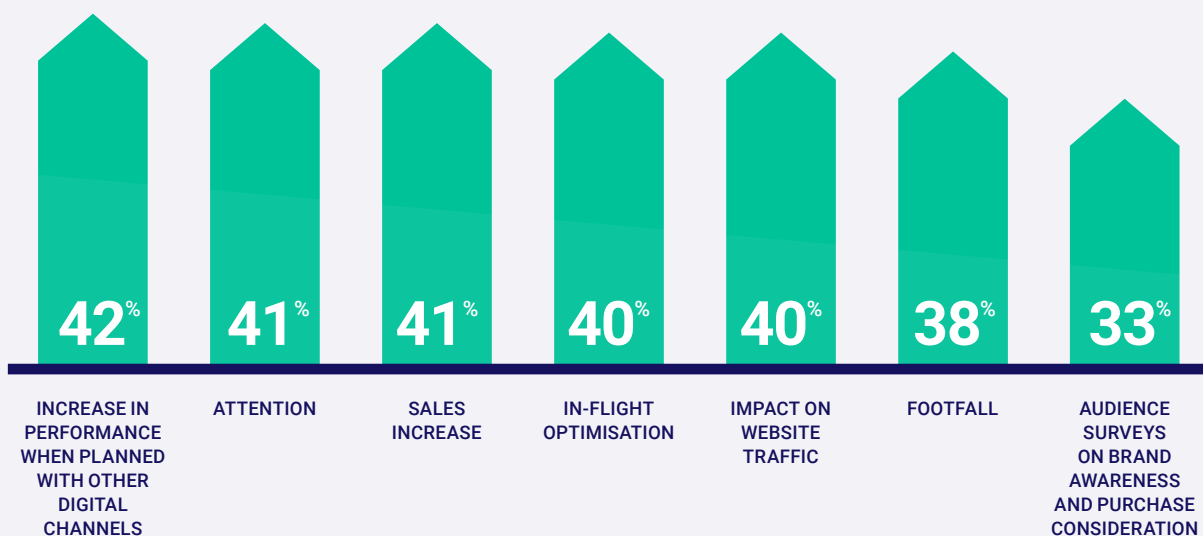
3 ATTENTION-BASED MEASUREMENT IS GAINING TRACTION IN FRANCE

Attention-based metrics, such as dwell time and eye-tracking data, are emerging as a key focus for French marketers when measuring prDOOH campaign success, with 41% utilising them compared to 36% globally¹³.

This emphasis on capturing audience engagement highlights a growing recognition of the importance of attention in out-of-home advertising. While sales uplift (41%) and improved performance / impact on other media channels (42%) remain important, the increasing adoption of attention-based metrics suggests a shift towards a more nuanced understanding of campaign effectiveness in France.

By measuring not just whether an ad was seen, but also how it was engaged with, French marketers can gain deeper insights into the true impact of their prDOOH campaigns, leading to more effective and efficient advertising strategies.

HOW DO YOU SEE MEASUREMENT/ATTRIBUTION IN PROGRAMMATIC DIGITAL OUT-OF-HOME BEING MEASURED?



Source: D5 Base size: all respondents FR (201)



WHAT IS THE FUTURE OUTLOOK FOR prD00H IN FRANCE?



The prDOOH market in France is set for significant growth, with marketers predicting a substantial 29% increase in spending over the next 18 months, primarily driven by media agencies (32% compared to 26% for advertisers)¹⁴. This forecast aligns with the highest global growth rates, matching those in the US and UK, and surpassing the overall average of 27%.

This surging demand for prDOOH is reshaping budget allocations. Over a third of surveyed marketers in France (36%) are now reallocating funds from other digital channels, a trend that has slightly increased since 2023 (+2ppt YoY), highlighting prDOOH's increasing appeal within the digital advertising landscape.

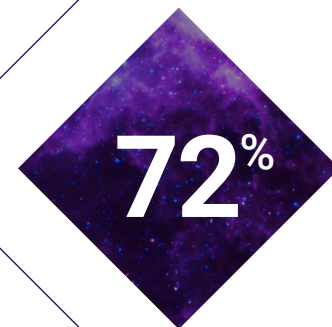
To fully harness the power of prDOOH, French marketers are actively investing in expanding their expertise in this domain. A notable 72% plan to do so in the next 18 months, surpassing the global average of 63%¹⁶. This reflects a strong commitment to mastering the intricacies of programmatic buying and unlocking its full potential.

Furthermore, there's a growing emphasis on data-driven decision-making in the French market, with 68% of marketers intending to utilise data more extensively for prDOOH campaign planning. This represents a substantial 10 percentage point increase year-over-year, reflecting a growing recognition of the value of data in optimising campaign effectiveness and achieving better results.



FRENCH MARKETERS

**PLAN TO INCREASE
SPEND IN PROGRAMMATIC
DIGITAL OUT-OF-HOME
BY AN AVERAGE OF 29%**
OVER THE NEXT 18 MONTHS



**OF FRENCH MARKETERS
WILL INVEST IN BUILDING
OUT THEIR PROGRAMMATIC
DOOH EXPERTISE**
IN THE NEXT 18 MONTHS

¹⁴ B7: How do you think your advertising investment in the following media will change in the next 18 months?

¹⁵ C5: If the budget is going to be increased for programmatic digital out-of-home, where is this budget being moved from?

¹⁶ 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?

To further unlock the potential of prDOOH and stimulate greater investment, French marketers are seeking enhancements in several areas^{17 18}:



Widespread education on the benefits of both prDOOH (and DOOH in general (50%))

This includes training on programmatic buying, campaign optimisation, and measurement strategies to empower newcomers to the DOOH landscape, enabling them to fully leverage the potential of both DOOH and prDOOH.



Audience-specific insights

Marketers want access to granular audience data, including demographic, interest-based, and behavioural, to refine targeting strategies and deliver more personalised and relevant ads.



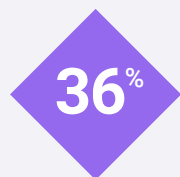
More situational data

This includes real-time information on weather, traffic, events, and other contextual factors that can be used to trigger dynamic creative adjustments and deliver more relevant messaging to target audiences.



Ability to buy packages (e.g. verticals, seasonal)

This would simplify the buying process and enable advertisers to seamlessly align their prDOOH campaigns with specific industries, seasons, or events.



Improved cost efficiency

As prDOOH often commands a premium vs. direct-sold DOOH, demonstrating its cost-effectiveness through data utilisation, improved campaign efficiencies and transparent reporting is crucial for wider adoption.



More behavioural / site-based data

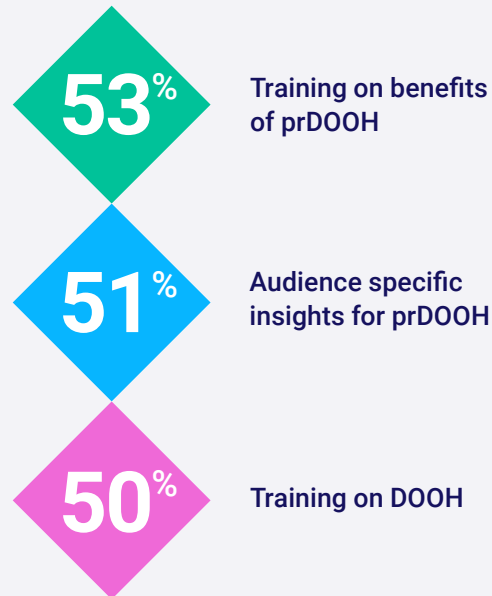
By tapping into richer contextual data, including insights into consumer behaviour, movement patterns, and site visitation, marketers gain a deeper understanding of where and how to best engage their target audience, allowing them to tailor content for maximum impact and resonance.

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



Source: C8, D4. Base size: FR (201)

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?



When I'm working with a client, it's not always easy for them to understand why programmatic could be a good solution... I feel like advertisers do not have all the clues to understand the benefits of programmatic activations.

PAOLA EPOUMA MPEMBE
PROGRAMMATIC CONSULTANT, HAVAS INTERNATIONAL PARIS

In France, people are not still very educated about [prDOOH], but I think as an agency, this is our role to reassure our clients and tell them that it is a good strategy to activate with full funnel and it will have an impact.

CHLOÉ RAUCH
SENIOR DISPLAY & PROGRAMMATIC CONSULTANT,
ARTEFACT, FRANCE

The French prDOOH market has made notable progress since 2023, with marketers' concerns regarding standardisation and prDOOH's role within multi-channel campaigns diminishing by -7ppts and -5ppts respectively, suggesting positive industry advancements.

By addressing current needs, the industry can continue on its positive trajectory and unlock new opportunities for growth and innovation in the channel.

CONCLUSION

As an established market for programmatic Digital Out-of-Home (prDOOH), France is witnessing a sustained increase in demand. By addressing existing challenges, such as data availability and measurement, and continuing to educate marketers on prDOOH's unique benefits, the industry is poised for significant growth. The increasing integration of prDOOH into multi-channel strategies and the diminishing concerns surrounding standardisation further underscore the market's readiness for expansion.

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

FRANCE SAMPLE PROFILE

SIZE OF ADVERTISING BUDGET

42%

Under
€1m

18%

Between
€1m and €5m

18%

Between
€5m and €20m

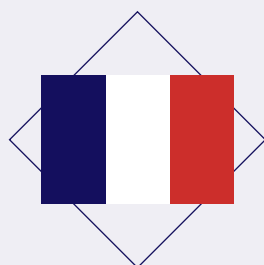
13%

Between
€20m and €150m

9%

Over
€150m

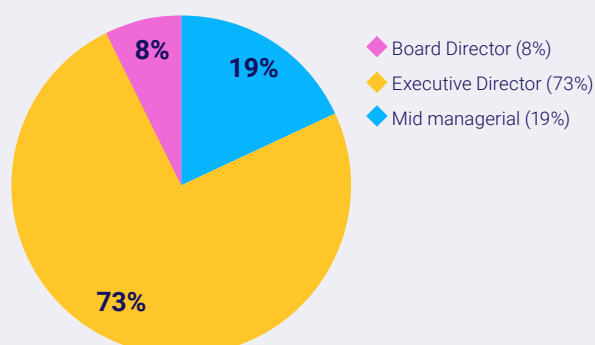
COUNTRY

**N=201**

SECTOR

| Sector Net | Percentage |
|---------------------------------------|------------|
| Retail, luxury, clothing, FMCG/CPG | 30% |
| Food, Drink, Hospitality | 16% |
| Finance, advertising, consulting | 13% |
| Tech, telco | 13% |
| Academic, gov, non-profit, healthcare | 8% |
| Automotive, transport | 8% |
| Entertainment, gambling | 7% |
| Property, utilities | 4% |

MANAGERIAL RESPONSIBILITY



ORGANISATION TYPE

