STATE OF THE NATION
Programmatic DOOH 2025

VIOOH

Nordics market highlights

In partnership with
mtm

CONTENTS

Market highlights

EXECUTIVE SUMMARY

- **pDOOH adoption in the Nordics is outpacing global trends, with further growth expected.** In the past year, 32% of all campaigns in the Nordics included programmatic DOOH, already surpassing the 2024 global average of 27%. This figure is projected to rise to 34% by 2026, reflecting a steady upward trajectory.

- **Marketer confidence in pDOOH is at an all-time high, backed by strong investment intentions.** An overwhelming 99% of Nordic marketers plan to invest in pDOOH over the next 12 months - making it the most planned-for channel, ahead of social media (94%) and directly bought DOOH (91%). This surge in planned investment is expected to translate into a 37% average increase in spend, significantly higher than last year's global benchmark of 28%.

- **pDOOH is becoming a core element of digital media strategies across the region.** The vast majority (83%) of Nordic marketers now buy pDOOH through digital or programmatic teams, enabling closer integration with broader digital campaigns. This underscores a fundamental shift in how programmatic out-of-home is perceived and activated within multi-channel strategies.

- **Budgets are shifting decisively toward pDOOH, often at the expense of other media.** 89% of marketers report reallocating budget from digital channels to fund pDOOH campaigns, while 72% are drawing from traditional media budgets. Importantly, marketers working with dedicated pDOOH or DSP-managed teams are more likely to unlock entirely new budgets (55% and 53% respectively).

- **Innovation and sustainability are key drivers of future growth, despite some barriers.** With 90% of Nordic marketers recognising pDOOH as a source of innovation, the appetite for advanced capabilities like Dynamic Creative Optimisation (DCO) is growing. While only 15% are currently using DCO, 84% are exploring or piloting it.

Introduction

Programmatic digital out-of-home (pDOOH) is revolutionising how brands engage audiences in the physical world by merging the dynamic potential of DOOH with the speed and intelligence of programmatic buying, providing advertisers with greater control, smarter targeting, and real-time flexibility.

VIOOH's State of the Nation is an annual research programme that delivers in-depth insights into this fast changing landscape. Now in its sixth year, the 2025 workstream continues VIOOH's collaboration with international research and strategy agency MTM, surveying senior advertiser and agency professionals across key global markets who are joint or sole decision-makers for advertising within their business. Participants in this research have already purchased pDOOH in the past 12 months or are digital buyers open to purchasing it.

The 2025 Nordic edition marks the first time our research has focused specifically on Finland, Sweden, Norway, and Denmark — four markets identified as having strong potential for pDOOH growth. With each country progressing at a different pace, this edition explores the opportunities and challenges shaping the development of pDOOH across the Nordics. It also offers practical insights into how the industry can harness this momentum and support continued expansion in this dynamic region.

To provide broader context, we compare data from the Nordics with findings from the 2023 and 2024 editions of the global State of the Nation report. The 2023 report covered core markets — the USA, UK, Germany, France, and Australia — plus guest market Spain. The 2024 edition included the same core markets, with Brazil as the guest market.

Alongside this Nordic report, we will shortly publish a report featuring insights from the Chinese market, and further market reports will be released in Q1 2026. To find out more, visit **viooh.com/sotn**.

viooh.com
hello@viooh.com

This white paper explores the key findings from qualitative and quantitative research, including growth in investment, adoption trends, measurement challenges, and sustainability considerations.

By providing insights into market trends, challenges, and future opportunities, this paper aims to guide stakeholders in navigating the evolving programmatic DOOH landscape in the Nordics.

JC CONTI, CEO, VIOOH

What does the growth trajectory of pDOOH look like in the Nordics?

Our survey respondents indicated that in the past 18 months, 32% of all Nordic campaigns included pDOOH, outpacing the 2024 global average[1] of 27%, and that share is expected to rise to 34% by 2026[2]. This signals a strong intent to embed pDOOH more deeply within future campaign strategies — reflecting a broader ambition to align with the innovation and growth that defines the global pDOOH landscape.

While pDOOH may still be in its relative infancy across the Nordics, there's clear evidence that the region is evolving quickly and with purpose. Nordic marketers are eager to reach the heights of 2023/24 global benchmarks and leverage the full potential of this dynamic, data-driven channel.

Almost all Nordic marketers (99%) plan to invest in pDOOH over the next 12 months, surpassing the 95% of marketers in leading global markets who said they had similar intentions[3]. This makes pDOOH the most planned-for channel in the Nordics, with social media (94%) and non-programmatic digital out-of-home (91%) following closely behind[4]. This strong commitment is unsurprising, as 90% of Nordic marketers believe pDOOH offers some of the most innovative opportunities in media today[5].

99%

OF NORDIC MARKETERS

PLAN TO INVEST IN pDOOH OVER THE NEXT 12 MONTHS

90%

OF NORDIC MARKETERS

BELIEVE pDOOH OFFERS SOME OF THE MOST INNOVATIVE OPPORTUNITIES IN MEDIA TODAY

1 2024 global average includes data from USA, UK, AUS, DE, FR, BR
2 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?
3 A9. Which of the following media are you planning to, or open to, placing, planning or buying advertising for in the next 12 months? 2024 global average includes data from USA, UK, AUS, DE, FR, BR
4 A9. Which of the following media are you planning to, or open to, placing, planning or buying advertising for in the next 12 months?
5 B6. Which of these media are developing the most innovative opportunities for advertisers?

viooh.com
hello@viooh.com

WHICH OF THE FOLLOWING MEDIA ARE YOU PLANNING TO, OR OPEN TO, PLACING, PLANNING OR BUYING IN THE NEXT 12 MONTHS?

1. **99%** pDOOH
2. **94%** Social Media
3. **91%** Direct DOOH

Note: Nordic markets include Sweden, Finland, Norway and Denmark
Source: A9 Base size: Total (600). Please note data does not equal 100% due to responses to questions being multi select.

Looking ahead, Nordic marketers expect their pDOOH investment to grow by an average of 37% over the next year, significantly higher than the 28% global average (2024)[6]. This indicates a strong desire to catch up with global markets and capitalise on the growing momentum of pDOOH.

> ***The technology behind pDOOH is truly impressive, especially taking a look back a few years ago during the very early phase of pDOOH. It's mind blowing to witness and be part of the growth and potential for the future. As media buyers, this boosts our confidence in including pDOOH into our media mix planning and strategies. Its value has become evident and other media buyers across sectors are recognising its impact as well.***
>
> ANNICK BATAMULIZA,
> DIGITAL MEDIA SPECIALIST, ARLA FOODS

37%

NORDIC MARKETERS
EXPECT THEIR pDOOH INVESTMENT TO GROW
BY AN AVERAGE OF 37% OVER THE NEXT YEAR

6 B7. How do you think your advertising investment in the following media will change in the next 18 months? 2024 global average includes data from USA, UK, AUS, DE, FR, BR

STATE OF THE NATION
Programmatic DOOH 2025

How is the adoption of pDOOH evolving?

While the number of Nordic campaigns incorporating pDOOH is strong, this expertise remains concentrated in the hands of a select group of marketers. In the past 12 months, only 37% of Nordic marketers have bought pDOOH, compared to an average of 65% in leading global markets in 2024[7].

In Nordic markets, 53% of respondents usually or always purchase DOOH programmatically[8], compared with 50% globally in 2024, outpacing both direct only buys (50% Nordics, 49% global) and hybrid direct and programmatic approaches (42% Nordics, 43% global).

A notable distinction emerges between advertisers and agencies in the region: 46% of advertisers have embraced pDOOH in the last 12 months, while just 28% of agencies have done the same[9]. This disparity may be due to 40% of Nordic agency respondents citing a lack of understanding of pDOOH's capabilities and its role in campaigns (41%) as key barriers to investment[10].

In contrast, advertisers find pDOOH particularly appealing because of its flexibility and ease of activation, allowing for real-time adjustments and agile campaign execution. In fact, 48% of advertisers rank the flexibility to start, stop, or pause campaigns as a top-five factor influencing media spend decisions[11].

Sectors such as property & utilities (53%) and tech & telco (39%) are leading the charge in pDOOH adoption, having been the most active users over the past 12 months[12]. These are often national or local industries that are likely capitalising on pDOOH's ability to layer messaging and deliver contextual targeting, enabling them to engage in-market audiences where they are, with content that's both highly relevant and timely.

In Norway, if you buy [DOOH] direct and you want to buy just specific locations, you're going to have to go to different media vendors. But doing that all together in programmatic is a big selling point — buying across media vendors, getting one report instead of three. It also means that more teams [and people] can buy programmatic, which broadens its use.

TOM STRØMØ, PRODUCT AND TECH LEAD, GROUPM NEXUS

We have clients who exclusively buy programmatic DOOH. But we also work with clients running large traditional OOH campaigns, where programmatic DOOH plays a smaller, complementary role — allowing us to add an extra layer of impact or precision.

PATRIK GARPMO,
SENIOR PROGRAMMATIC AND AD OPERATIONS SPECIALIST,
TRE KONOR MEDIA

7 A8. Which of the following media have you placed, planned or bought advertising for in the last 12 months?
8 B11: In the past 12 months, how have your digital out-of-home campaigns typically been bought? Please note data does not equal 100% due to buying methods rated separately on a 5-pt scale from 'Never' to 'Always' allowing for overlap of 'Usually/Always' responses.
9 A8. Which of the following media have you placed, planned or bought advertising for in the last 12 months?
10 C15. Which of the following, if any, are preventing you from adopting more programmatic digital out-of-home campaigns in your media plan?
11 B8. How important are the following factors in your media planning and buying decisions? Please select top five considerations and rank them in priority order (e.g. the most important factor first).
12 A8. Which of the following media have you placed, planned or bought advertising for in the last 12 months?

How is pDOOH planned and bought in the Nordics?

One of the most compelling insights emerges when we examine how pDOOH is planned and bought.

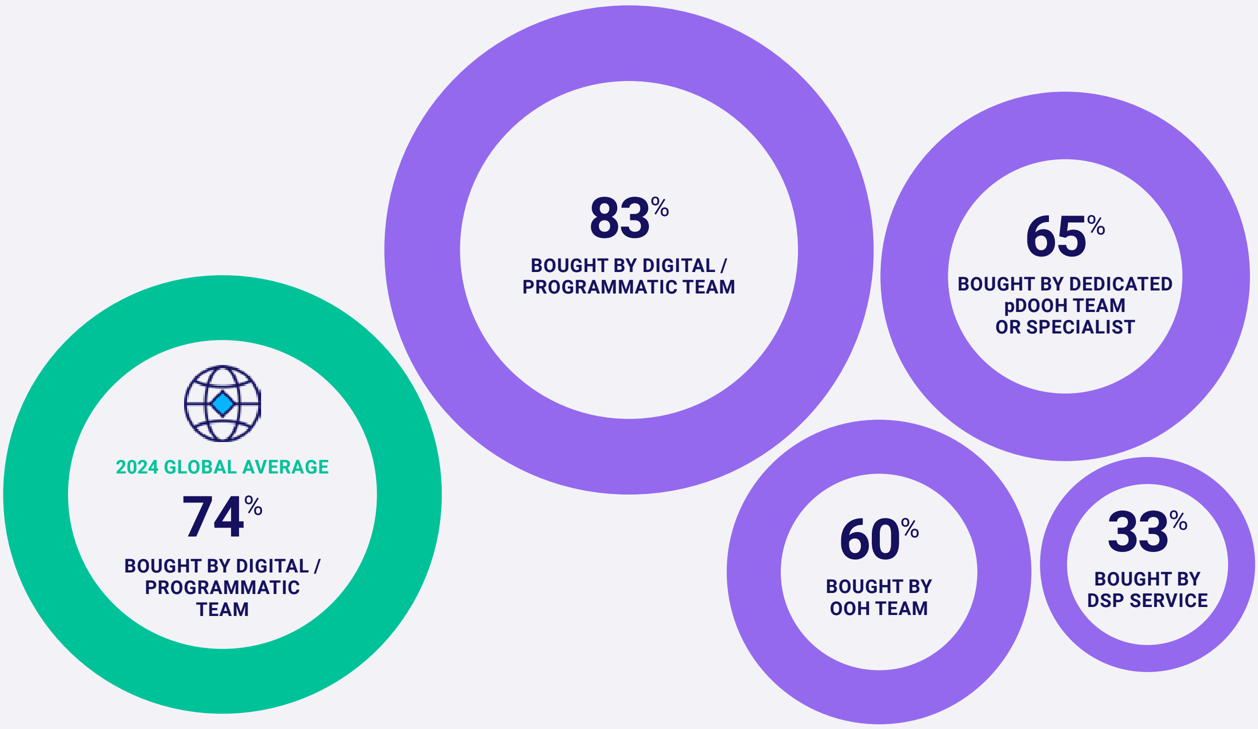
While the region's fragmented DSP ecosystem — with no single dominant platform — has prompted 33% of marketers to rely on managed service DSP teams (compared to just 15% globally in 2024), this complexity hasn't slowed progress[13]. In fact, Nordic marketers are leading the way with a digitally integrated, programmatic-first approach.

Firstly, across both brands and agencies, pDOOH in the Nordics is primarily bought by digital or programmatic teams (83%), closely mirroring the 2024 global trend of 74%[14]. At the same time, OOH specialist media agencies remain central to the buying process, with 83% of Nordic brands surveyed purchasing pDOOH through them[15].

pDOOH requires a hybrid skill set that many agencies are still developing. You're essentially merging traditional OOH location and audience planning with programmatic data activation and real-time optimisation. Without understanding both sides, it's easy to either overpay, or underutilise the channel's unique capabilities.

MICHAEL O'SHEA, PARTNER, NØRR3

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



Source: C3 Base size: all respondents who place pDOOH 2025. Total (224), 2024 Total (774).
Note Global markets from 2024 include USA, UK, AU, FR, DE, BR. Please note data does not equal 100% due to responses to questions being multi select.

13 C3. How has the programmatic digital out-of-home advertising you have placed, planned or bought in the last 12 months typically been bought? 2024 global average includes data from USA, UK, AUS, DE, FR, BR
14 C3. How has the programmatic digital out-of-home advertising you have placed, planned or bought in the last 12 months typically been bought? 2024 global average includes data from USA, UK, AUS, DE, FR, BR
15 C1. Who has typically been responsible for planning and buying programmatic digital out-of-home in the last 12 months?

STATE OF THE NATION
Programmatic DOOH 2025

Where is the budget for pDOOH coming from?

Agencies are doing far more than marrying pDOOH with direct bought DOOH and traditional OOH — they're playing a proactive role in embedding pDOOH within wider digital and programmatic strategies, helping to accelerate its integration into modern media plans.

As a result, Nordic marketers are significantly more likely to plan pDOOH as part of wider digital activity — 83% do so, compared to just 35% in key global markets[16] in 2023. This mindset is especially prevalent among media agencies (87%), with advertisers (80%) close behind[17].

A significant portion of the budget for pDOOH is expected to come from existing digital budgets, with 89% of marketers reallocating funds from these channels, while 72% plan to move money from traditional channels such as press or radio[18].

This inclination is especially strong in the Nordics, where marketers' strong alignment of pDOOH with digital explains why they're more likely to reallocate funds from digital channels compared to their global counterparts, with 58% of Nordic marketers planning to make the shift, well above the 38% 2024 global average[19].

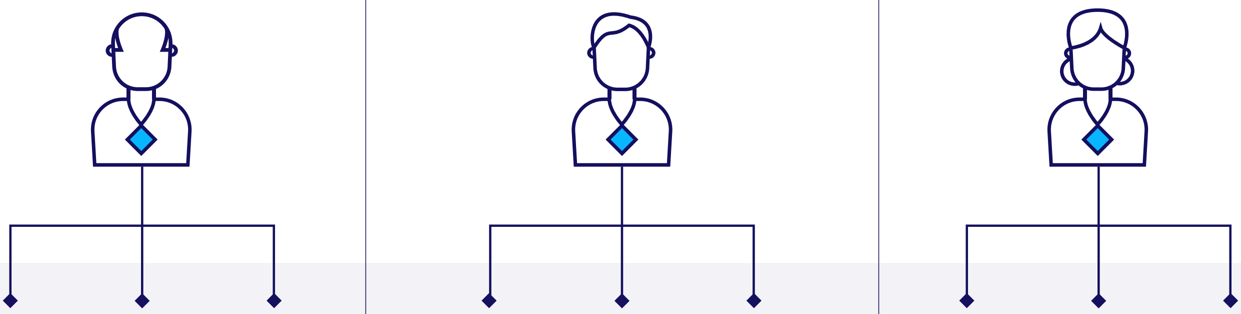
IF BUDGET IS GOING TO BE INCREASED FOR PROGRAMMATIC DIGITAL OUT-OF-HOME, WHERE IS THIS BUDGET BEING MOVED FROM?

	NORDICS AVG.	SE	FI	NO	DK
Digital channels (including DOOH)	**89%**	92%	91%	87%	86%
Traditional channels (including traditional OOH)	**72%**	66%	79%	76%	69%
New budget is being added for pDOOH	**41%**	50%	40%	39%	36%

Source: C5. Base size: all respondents increasing pDOOH Total (434), DK (103), FI (108), NO (104), SE (119). Please note verticals do not equal 100% due to responses to question being multi select as budgets for pDOOH may come from multiple sources.

16 C2. How has the programmatic digital out-of-home advertising you have placed, planned or bought in the last 12 months typically been planned? 2023 global average includes data from USA, UK, AUS, DE, FR, ES
17 C2. How has the programmatic digital out-of-home advertising you have placed, planned or bought in the last 12 months typically been planned?
18 C5. If budget is going to be increased for programmatic digital out-of-home, where is this budget being moved from?
19 C5. If budget is going to be increased for programmatic digital out-of-home, where is this budget being moved from? 2024 global average includes data from USA, UK, AUS, DE, FR, BR

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



BUDGET ORIGINATION

Out-of-home team

- **70%** Other traditional channels
- **68%** Other digital channels
- **66%** Traditional OOH

Dedicated programmatic DOOH team

- **80%** New investment
- **65%** Digital channels including DOOH
- **64%** Traditional OOH

Digital / programmatic teams

- **90%** New investment
- **81%** Other digital channels
- **82%** Traditional OOH

Source: C3/C5. Base size: all respondents who place pDOOH (224). Please note data does not equal 100% due to responses to question being multi select as budgets for pDOOH may come from multiple sources.

Interestingly — but not surprisingly — marketers who say their pDOOH is bought by a dedicated pDOOH team are more likely to report unlocking new budgets to support its growth (80%)[20]. This is likely due to the singular focus of pDOOH teams compared to broader digital or OOH teams who are juggling different media owners and priorities.

Among advertisers, those who in-house their media buying are more likely to unlock new budgets for pDOOH (52%) or shift funds from other digital channels (65%) to support its growth[21]. This may suggest that pDOOH's relative simplicity — compared to channels like CTV that often require agency support to navigate media owners, develop creative, and manage execution — is a key factor in its growth.

This signals a more holistic positioning for pDOOH in the Nordics where it is viewed as a distinct and complementary media within a multi-channel strategy. As pDOOH gains momentum, it is being embedded directly into digital-first media strategies, reflecting the region's advanced digital maturity and strong appetite for scalable, programmatic solutions.

Furthermore, pDOOH is being placed front and centre by Nordic marketers, with 65% reporting they have a dedicated pDOOH team or specialist that has purchased pDOOH in the past 12 months — significantly higher than the 2024 global average of just 29%[22]. This underscores the strategic significance and growing priority that pDOOH holds within the region.

20 C5. If budget is going to be increased for programmatic digital out-of-home, where is this budget being moved from?
21 C5. If budget is going to be increased for programmatic digital out-of-home, where is this budget being moved from?
22 C3. How has the programmatic digital out-of-home advertising you have placed, planned or bought in the last 12 months typically been bought? 2024 global average includes data from USA, UK, AUS, DE, FR, BR

Why are Nordic marketers using pDOOH in their campaigns?

Nordic marketers value pDOOH for its flexibility across brand and performance campaigns, with its real strength in delivering dynamic, real-time messaging based on factors like audience movement, weather, or time of day.

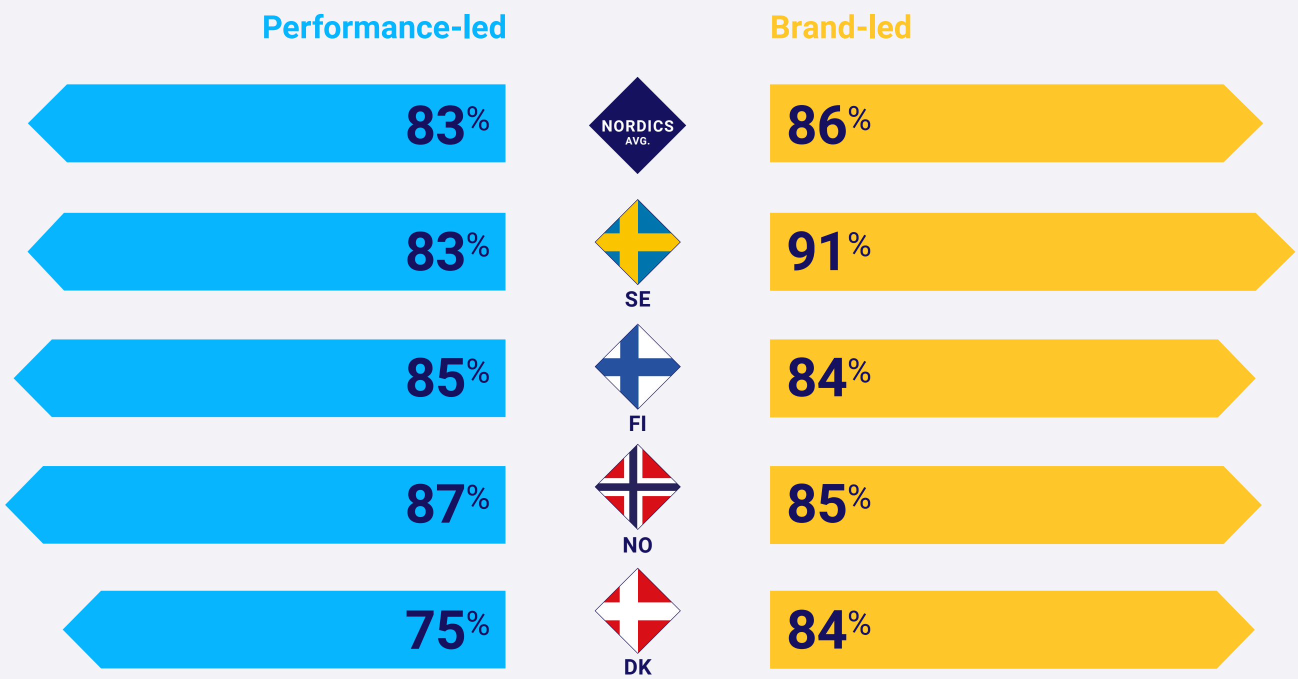
An impressive 86% of Nordic marketers consider pDOOH important for brand campaigns, placing it just above the 2024 global average of 85%, and ranking it as the second-most important branding channel, behind only social media (91%)[23].

Reflecting their digital-first mindset, Nordic marketers are especially likely to integrate pDOOH with other digital channels in brand-led strategies — mostly social media (89%), as well as display (85%), and direct DOOH (84%)[24].

With programmatic, we can also use DOOH as a lower-funnel channel. For example, if we're running a campaign, we can combine social and display with programmatic OOH to create a true omni-channel presence. This helps build frequency across different media and ensures the message really gets noticed — and drives sales.

PATRIK GARPMO,
SENIOR PROGRAMMATIC AND AD OPERATIONS SPECIALIST,
TRE KONOR MEDIA

% OF RESPONDENTS WHO SEE pDOOH AS IMPORTANT FOR PERFORMANCE-LED / BRAND-LED CAMPAIGNS



Source: B4/B5 Base size: Total (600), DK (150), FI (150) NO (150), SE (150).

23 B5.What channels do you see as important for brand-led campaigns? 2024 global average includes data from USA, UK, AUS, DE, FR, BR
24 D2. Thinking about brand-led campaigns, which channels would you consider running programmatic digital out-of-home alongside?

When it comes to performance marketing, 83% of Nordic marketers consider pDOOH an effective channel — just below the 2024 global average of 91%[25].

What's particularly impressive is how quickly pDOOH has earned its place as a credible performance channel in the Nordics — ranking just behind established powerhouses like social media (92%) and display (84%)[26]. In more mature markets such as the USA, UK, Australia, Germany and France, it's taken time for the performance potential of pDOOH to be fully embraced. In these markets, we saw an 8% increase in pDOOH's perceived importance for performance campaigns between 2023 and 2024[27]. That Nordic marketers have adopted it so rapidly speaks to their tenacity, forward-thinking approach, and willingness to invest in getting the most out of the channel.

When running performance campaigns, and as with brand-led campaigns, Nordic marketers most often pair pDOOH with social media (89%), display (81%), and direct-bought DOOH (79%) — further reinforcing its role in integrated, digital-first strategies[28].

Despite the strong momentum behind pDOOH in the Nordics, most campaigns remain focused within a single market (40%), with just 28% extending regionally, while even fewer are activated pan-Europe (18%) or globally (15%)[29]. This highlights that while adoption is high, cross-border scaling remains an untapped opportunity — and a key area for future growth.

We have been starting to run multi-market campaigns, and with programmatic growing its presence, it is easy to activate all around the world.

ESPEN FROESTAD,
PROGRAMMATIC PRODUCT MANAGER, GROUPM NEXUS

We leverage programmatic DOOH both tactically and strategically. Tactically, it offers unmatched flexibility for data-driven activations and real-time optimisation. Strategically, it integrates seamlessly into our multi-channel campaigns, whether we're driving brand awareness or performance outcomes — the targeting capabilities work equally well for both objectives.

MICHAEL O'SHEA, PARTNER, NØRR3

25 B4. What channels do you see as important for performance-led campaigns? 2024 global average includes data from USA, UK, AUS, DE, FR, BR
26 B4. What channels do you see as important for performance-led campaigns?
27 B4. What channels do you see as important for performance-led campaigns? 2024 global average includes data from USA, UK, AUS, DE, FR. 2023 global average includes data from USA, UK, AUS, DE, FR
28 D1. Thinking about performance-led campaigns, which channels would you consider running programmatic digital out-of-home alongside?
29 C4. Of the programmatic digital out-of-home campaigns you've worked on in the previous 12 months, approximately what percent were run at each of the following levels?

STATE OF THE NATION
Programmatic DOOH 2025

How are marketers in the Nordics approaching pDOOH measurement?

One key enabler for scaling pDOOH in the Nordics is robust measurement. Nordic marketers point to cost efficiency (69%), brand effectiveness (68%), and ROI (65%) as the primary factors influencing whether they continue to invest in the channel — mirroring the same priorities cited by global marketers in 2024 – all factors that depend on strong, reliable measurement[30].

Yet, measurement remains one of the biggest challenges facing pDOOH in the region. Like their global counterparts, Nordic marketers predominantly use sales data (61% vs. 47% globally in 2024) and web traffic impact (58% vs. 43% globally in 2024) to assess effectiveness[31]. While useful, these metrics offer a limited view — particularly when trying to understand pDOOH's broader impact across the funnel.

The lack of standardised measurement frameworks further complicates efforts to evaluate cross-channel performance. Although marketers are increasingly comfortable linking pDOOH to lower-funnel outcomes, there's still room to improve understanding around the factors that drive feasibility for upper-funnel measurement — particularly when considering varied audience exposures across time, place, and creative.

In terms of measurement, there's room for more metrics to better isolate the impact of pDOOH. We have had the occasion to run two brand studies last year for our biggest brand in Norway which came with valuable insights on the brand, competitors and market positioning. It could be beneficial to expand these type of studies to more of our brands; however, such studies typically require a minimum spend to reach a specific level of impressions, which might be challenging for smaller brands with lesser budgets. Nevertheless, this shouldn't prevent us from assessing brand and sales impact; alternative measurement methods can be considered.

ANNICK BATAMULIZA, DIGITAL MEDIA SPECIALIST, ARLA FOODS

30 C13. How important are the following in determining your investment in programmatic digital out-of-home? 2024 global average includes data from USA, UK, AUS, DE, FR, BR

31 D5. How do you see measurement/attribution in programmatic digital out-of-home being measured? 2024 global average includes data from USA, UK, AUS, DE, FR, BR

How is sustainability shaping the future of pDOOH in the Nordics?

Sustainability is an important factor for Nordic advertisers, though it has yet to become a leading driver of investment decisions. While some media owners now provide carbon impact data, most advertisers have not fully embedded sustainability metrics into their media planning frameworks.

Currently, around a quarter (24%) of Nordic marketers rank the sustainability of a channel among their top three investment considerations — placing it on par with scalability (24%) and alignment with campaign objectives (24%)[32].

However, this still lags behind the 2024 global average, where nearly a third (31%) of marketers consider sustainability a top-three factor[33].

MOST IMPORTANT FACTORS WHEN PLANNING AND BUYING MEDIA (% SELECTED IN TOP 3 CONSIDERATIONS)

NORDICS AVG.

27% Budget required to achieve meaningful results
Ability to reallocate / optimise spend at short notice
Flexibility to stop, start or pause campaigns as needed

26% Ability to change creative message in real-time
Brand fit
Fit with target audience
Measurability of results

24% Campaign goals
Scalability of the channel
Sustainability of the channel

SE

35% Ability to increase, decrease or reallocate/ optimise media spend at short notice

27% Fit with the target audience
Ability to change creative message in real-time

26% Measurability of results
Brand fit

FI

31% Budget required to achieve meaningful results

30% Measurability of results

28% Flexibility to stop, start or pause campaigns as needed

NO

32% Fit with target audience

31% Scalability of the channel

29% Flexibility to stop, start or pause campaigns as needed

DK

31% Ability to change creative message in real-time

29% Budget required to achieve meaningful results

27% Scalability of the channel

Source: B8 Base size: Total (600), DK (150), FI (150) NO (150), SE (150).
Please note data does not equal 100% due to responses to questions being multi select.

32 B8. How important are the following factors in your media planning and buying decisions? Please select top five considerations and rank them in priority order (e.g. the most important factor first).
33 B8. How important are the following factors in your media planning and buying decisions? Please select top five considerations and rank them in priority order (e.g. the most important factor first). 2024 global average includes data from USA, UK, AUS, DE, FR, BR

What's particularly noteworthy is that Nordic marketers already recognise sustainable or eco-efficient reach as one of pDOOH's standout attributes. In fact, 64% cite it as a key benefit — second only to ROI generation and the channel's ability to activate flexibly under the right conditions (both 65%)[34]. Compared to other formats, pDOOH is also seen as outperforming on sustainability, ahead of direct DOOH (61%) and significantly more than traditional OOH (50%)[35].

It's been an increasing trend where both clients and advertisers are asking for more sustainability reports for their buys, [but] we haven't necessarily seen investment decisions made off the back of that. Ultimately, the client is going to go with what is going to deliver the best results for them, but sustainability is definitely becoming more a part of the conversation.

TOM STRØMØ, PRODUCT AND TECH LEAD, GROUPM NEXUS

34 B1. We will now show you a list of attributes and media types. Please choose any of the media you feel delivers against these attributes.
35 B1. We will now show you a list of attributes and media types. Please choose any of the media you feel delivers against these attributes.

What are the key market challenges and barriers hindering the adoption of pDOOH in the Nordics?

Despite the growing interest in programmatic DOOH, several challenges continue to hinder its full-scale adoption, the most prominent concern being inventory availability.

Nordic marketers highlight the limited supply of programmatically available DOOH inventory (53%), cost concerns (51%), and a lack of diverse deal options (50%) as key barriers. This highlights that these barriers[36] are largely tied to the early stage of the channel's development in the Nordics, with a clear need for greater education, measurement, and support to unlock its full potential.

WHICH OF THE FOLLOWING, IF ANY, ARE PREVENTING YOU FROM ADOPTING MORE PROGRAMMATIC DIGITAL OUT-OF-HOME CAMPAIGNS IN YOUR MEDIA PLAN?

	NORDICS AVG.	SE	FI	NO	DK
1	53% Limited amount of pDOOH inventory available in my market	55% Attribution / measurement challenges; Cost concerns	57% Limited amount of pDOOH inventory available in my market	53% Attribution / measurement challenges	54% Fewer deal options available for pDOOH
2	51% Cost concerns	51% Concerns around availability or accuracy of audience data available for pDOOH	55% Lack of infrastructure for integrating pDOOH with other channels on our plan	51% Lack of understanding of pDOOH capabilities and technology; Limited amount of pDOOH inventory available in my market	52% Limited amount of pDOOH inventory in my market; Cost concerns
3	50% Fewer deal options available for pDOOH	50% Limited amount of pDOOH inventory available in my market	51% Fewer deal options available for pDOOH	47% Concerns around availability or accuracy of audience data available for pDOOH; Cost concerns	49% Concerns around availability or accuracy of audience data available for pDOOH

Source: C15 Base size: Total (600), DK (150), FI (150) NO (150), SE (150).
Please note data does not equal 100% due to responses to questions being multi select.

36 C15. Which of the following, if any, are preventing you from adopting more programmatic digital out-of-home campaigns in your media plan?

Dynamic Creative Optimisation (DCO) is still in its early stages but shows strong potential. **In 2025, 15% of Nordic marketers are actively using DCO in their campaigns — outpacing the global average of 9% reported in 2024.** Additionally, 84% of Nordic marketers are either considering, piloting, or actively implementing DCO, slightly behind the 95% of marketers globally who said the same in 2024[37]. A key obstacle for DCO adoption is the limited access to relevant data sources, with 56% of marketers citing this as a major challenge[38]. Expanding access to data could help marketers unlock the full potential of DCO, with over half (54%) of Nordic marketers believing that DCO could significantly enhance the relevance and engagement of their pDOOH campaigns[39].

> ***We've just scratched the surface with regards to using DCO, and that's a big benefit of doing programmatic out-of-home. So I think that's going to grow a lot this year, and will help move the channel forward as well.***
>
> TOM STRØMØ, PRODUCT AND TECH LEAD, GROUPM NEXUS

WHICH, IF ANY, OF THE FOLLOWING POTENTIAL BENEFITS CAN DYNAMIC CREATIVE OPTIMISATION (DCO) OFFER FOR PROGRAMMATIC DIGITAL OUT-OF-HOME ADVERTISING?

1. 54% Enhanced engagement
2. 54% Improved relevance
3. 46% Real-time adaptability
4. 40% Data-driven creativity
5. 40% Creative flexibility
   Message sequencing

Source: D9
Base size: all respondents who do not use DCO or consider using in the future. Total (117).
Please note data does not equal 100% due to responses to questions being multi select.

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

1. 56% Limited access to necessary data sources for relevance
2. 51% Training on the possibilities of DCO campaigns
3. 51% Budgetary constraints for implementing DCO campaigns
4. 51% Concerns around privacy and brand safety
5. 49% Limited creative resources to develop ad templates and dynamic elements

Source: D8
Base size: all respondents who do not use DCO or consider using in the future. Total (117).

37 D7. Do you currently integrate Dynamic Creative Optimisation (DCO) into your programmatic digital out-of-home advertising? 2024 global average includes data from USA, UK, AUS, DE, FR
38 D8. Which of the following, if any, are preventing you from adopting Dynamic Creative Optimisation (DCO) for programmatic digital out-of-home advertising?
39 D9. Which, if any, of the following potential benefits can Dynamic Creative Optimisation (DCO) offer for programmatic digital out-of-home advertising?

STATE OF THE NATION
Programmatic DOOH 2025

What are the future trends and opportunities for pDOOH in the Nordics?

The expansion of premium inventory is expected to further accelerate the adoption of programmatic DOOH, particularly among smaller advertisers. However, to scale their investment, Nordic marketers are seeking greater access to real-time audience data (38%), direct response-driving data (37%), visibility into the impact on other digital channels (37%), and enhanced capabilities to execute DCO (37%)[40].

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?

	2024 GLOBAL	NORDICS AVG.	SE	FI	NO	DK
1	36% More audience data; Ability to buy packages	38% Real-time audience data	43% Real-time audience data	42% Real-time audience data	40% Ability to buy specific environments	41% Real-time audience data
2	35% Ability to buy specific environments	37% More data to drive direct responses; DCO; Visibility on impact on other digital media channels	42% Visibility on impact on other digital media channels	41% Ability to buy packages; DCO	38% More data to drive direct responses	38% Third-party ad verification
3	34% More cost efficiency from the market; Visibility on impact on other digital media channels	36% More behavioural / visitation / mobility data; Ability to buy specific environments; Situational data	37% More data to drive direct responses; Situational data; DCO	40% Situational data	37% More audience data; DCO	37% Proximity data

Source: C8 Base size: Total (600), DK (150), FI (150) NO (150), SE (150). Please note data does not equal 100% due to responses to questions being multi select. 2024 global average includes data from UK, US, FR, DE, AU, BR

40 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?

Industry-wide collaboration among media owners to establish standardised metrics and tools could help enable these growth drivers, improve cross-channel integration, and facilitate broader adoption. However, there is still work to be done.

Platforms also have an important role to play — while DCO presents significant potential for contextually relevant advertising, its adoption remains limited due to execution constraints in these markets.

Most importantly, both advertisers and agencies need further education on the benefits, capabilities, and best practices of programmatic DOOH to drive broader adoption. While nearly two-thirds of Nordic marketers (67%) plan to invest in expanding their pDOOH expertise over the next 12 months, and a similar proportion aim to make greater use of trigger-based buying (66%), DCO (65%), and audience data activations (64%), they also recognise the need for additional training[41]. Specifically, they are seeking guidance on the advantages of the channel (53%), how to measure ROI (53%), and best practices for using data to optimise campaigns (52%) to support this growth[42].

67%

OF NORDIC MARKETEERS
PLAN TO INVEST IN EXPANDING THEIR pDOOH EXPERTISE
OVER THE NEXT 12 MONTHS

41 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?
42 D4. Which, out of the following, would help you learn more about programmatic digital out-of-home advertising?

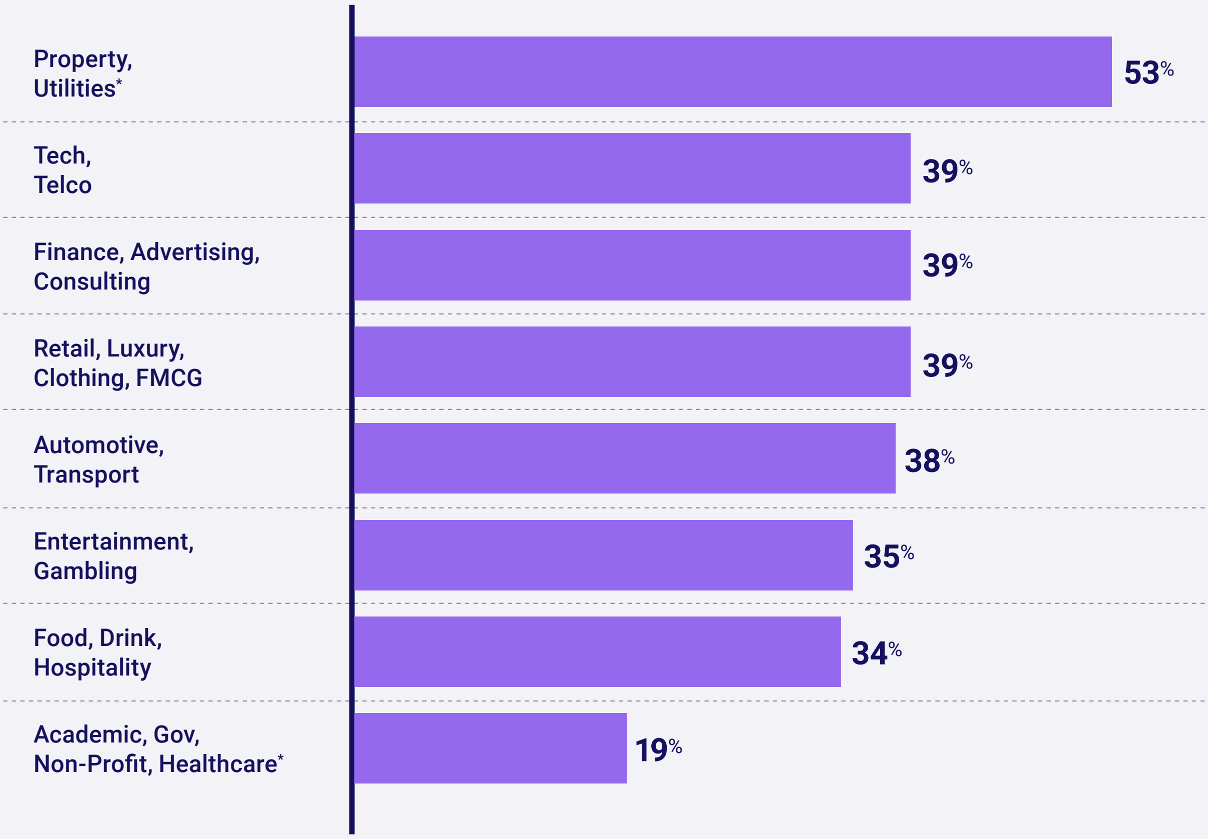
CONCLUSION

Programmatic DOOH is evolving rapidly in the Nordic region, driven by increasing investment, technological advancements, and an expanding pool of inventory.

However, key challenges such as measurement, transparency, and market fragmentation must be addressed to unlock its potential.

The future success of programmatic DOOH will depend on the availability of better measurement tools, clearer pricing, increased collaboration, and ongoing education for both agencies and advertisers.

TOP SECTORS FOR PLACING, PLANNING OR BUYING pDOOH OVER THE LAST 12 MONTHS



Source: A8 Base size:
Academic, gov, non profit, healthcare (36), Retail, luxury, clothing, FMCG (149), Finance, advertising, consulting (54), Entertainment, gambling (77), Food, Drink, Hospitality (90), Tech, telco (90), Automotive, transport (68), Property, utilities (36)
Note: * base size below 50, results are indicative only.
Please note data does not equal 100% due to responses to questions being multi select.

SAMPLE PROFILE

SIZE OF ADVERTISING BUDGET

35%
Under €1m
NO (under Kr 12m)
SE (under Kr 11m)
DK (under Kr 8m)

24%
Between €1m & €5m
NO (Between Kr 12m – Kr 58m)
SE (Between Kr 11m – Kr 56m)
DK (Between Kr 8m – Kr 37m)

19%
Between €5m & €20m
NO (Between Kr 58m – Kr 233m)
SE (Between Kr 56m – Kr 222m)
DK (Between Kr 37m – Kr 149m)

11%
Between €20m & €150m
NO (Between Kr 233m – Kr 1.8bn)
SE (Between Kr 222m – Kr 1.7bn)
DK (Between Kr 149m – Kr 1.1bn)

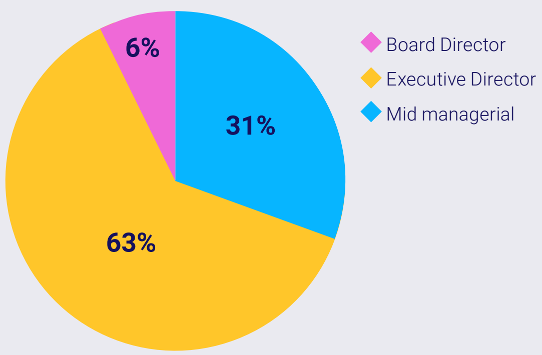
10%
Over €150m
NO (Over Kr 1.8bn)
SE (Over Kr 1.7bn)
DK (Over Kr 1.1bn)

COUNTRY

SECTOR

Sector Net	Percentage
Retail, luxury, clothing, FMCG/CPG	25%
Food, Drink, Hospitality	15%
Tech, telco	15%
Entertainment, gambling	13%
Automotive, transport	11%
Finance, advertising, consulting	9%
Academic, gov, non-profit, healthcare	6%
Property, utilities	6%

MANAGERIAL RESPONSIBILITY



ORGANISATION TYPE