

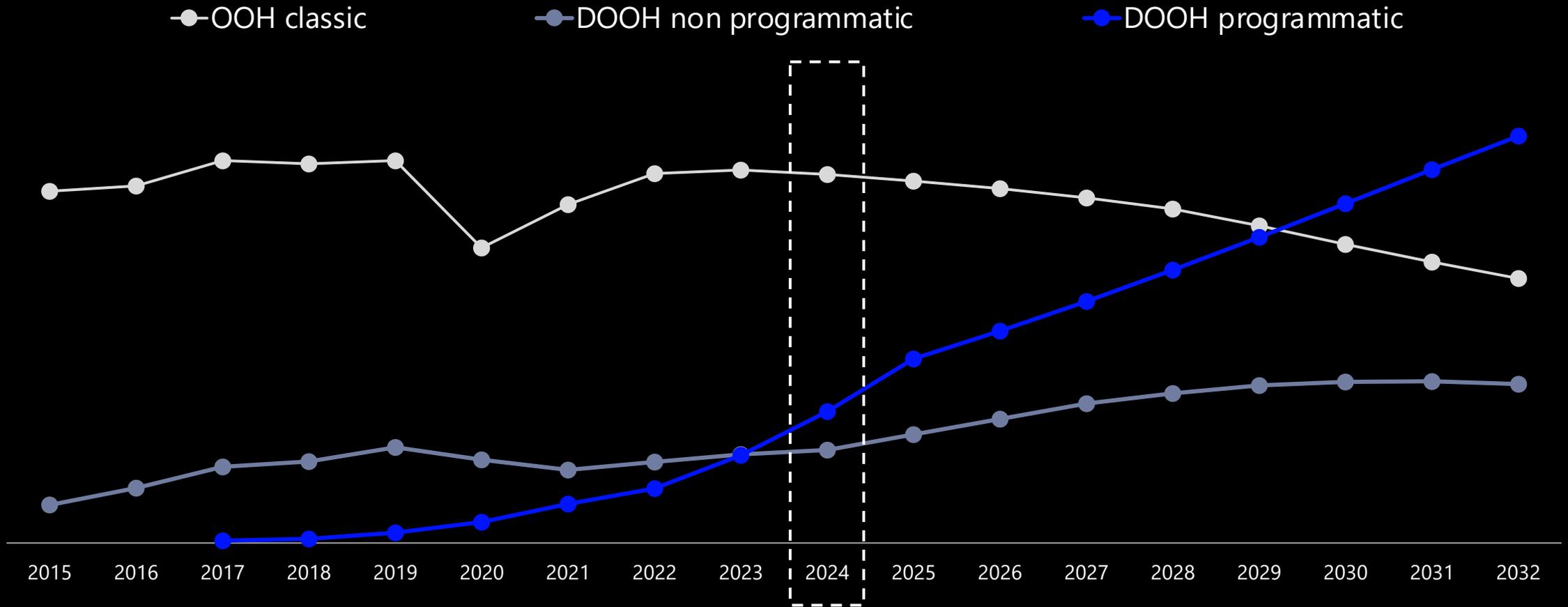
JCDecaux

JCDecaux PROGRAMMATIC

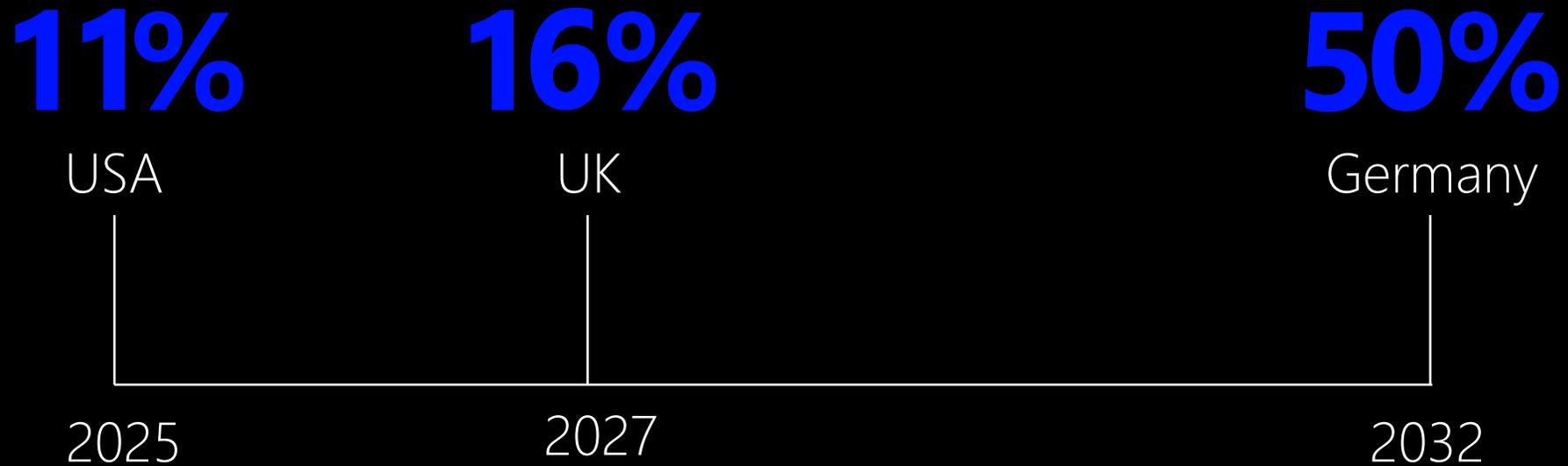
# Programmatic **meets** Direct IO Out-of-Home

Brad Palmer – National Programmatic Director – JCDecaux Australia  
Jeremy Lewington – Senior Digital Marketing Manager – 7-Eleven Australia

# 2024 was the year where programmatic overtook direct IO digital Out-of-Home in Germany

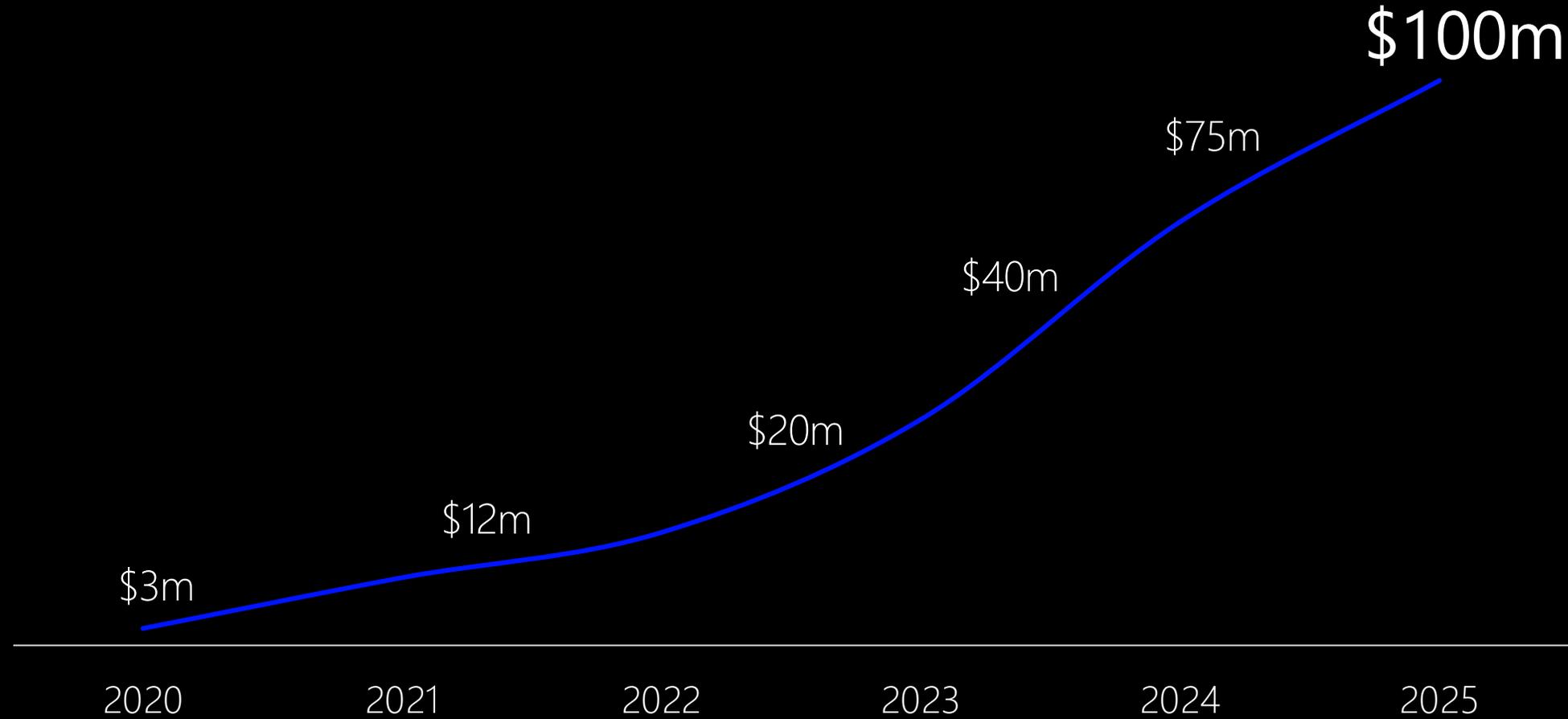


And the share of total Out-of-Home revenues to programmatic will be significant in years to come

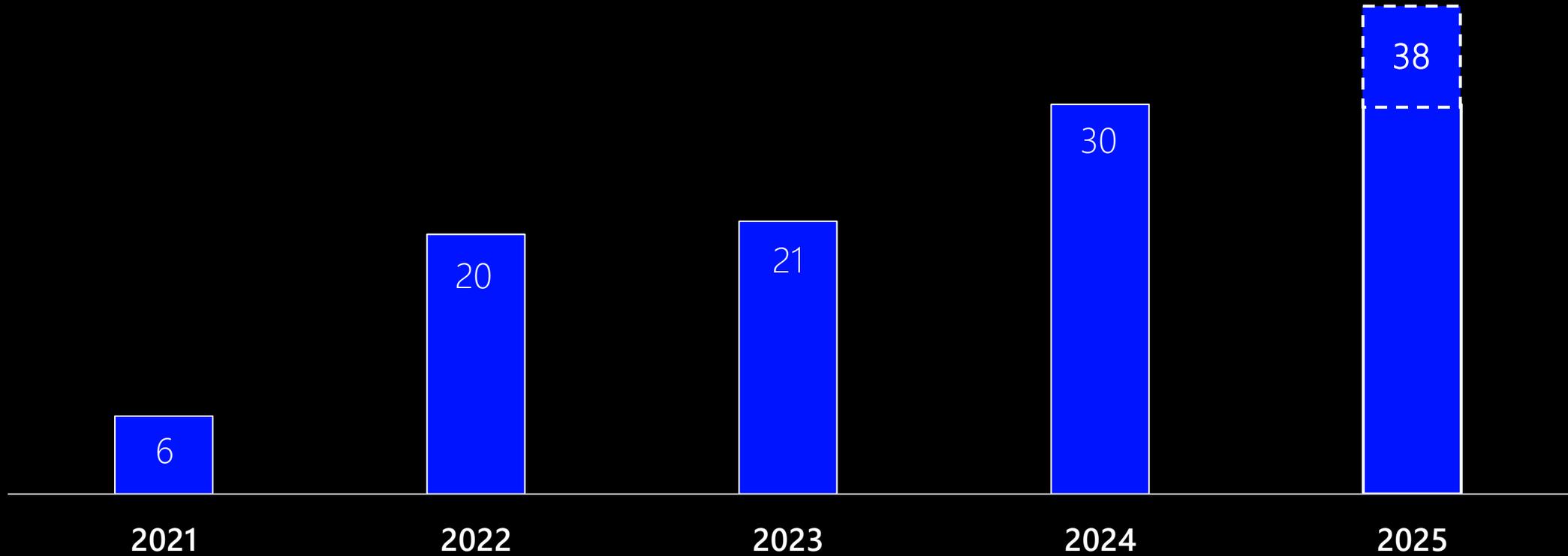


Based on similar UK market economics, Australia should be a \$200M market by 2027

Despite recent impressive growth, prDOOH revenue in Australia is still at **only 5%** of total Out-of-Home revenue



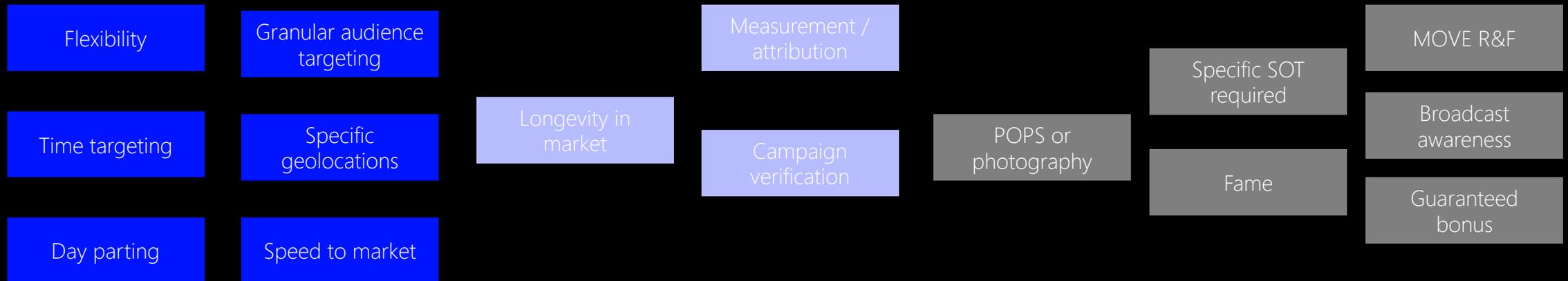
**76%** of JCDecaux's Top 50 direct IO advertisers will also trade programmatically in 2025



Current Top 50 direct IO advertisers who have also traded programmatically over the past 5 years

# Programmatic and Direct IO campaign variables

Transaction method decisions depend on the importance of the campaign variables. Sometimes it makes sense to do both and run a hybrid campaign.



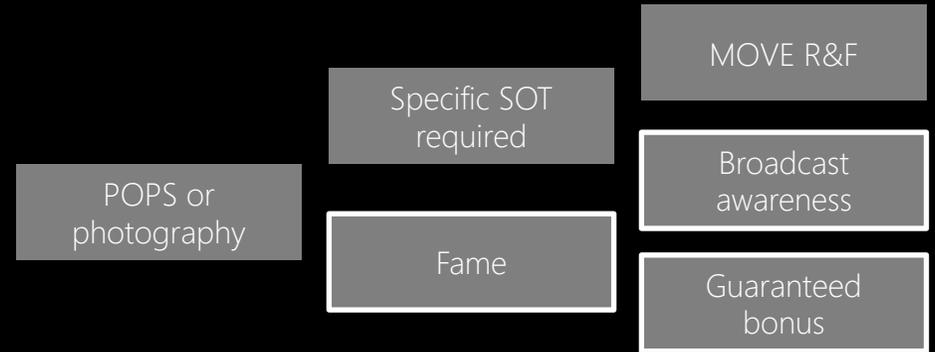
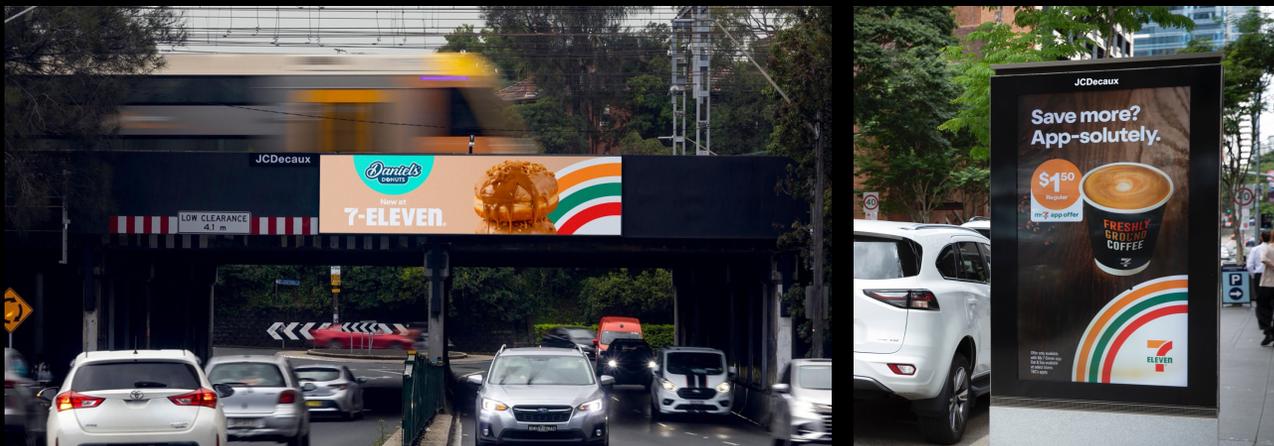
This is more of a **PROGRAMMATIC** campaign

This is more of a **DIRECT IO** campaign



# Direct IO variables

← Scale of importance to reach the campaign objectives →



This is more of a DIRECT IO campaign



# Programmatic variables

← Scale of importance to reach the campaign objectives →

Flexibility

Granular audience targeting

Measurement / attribution

Time targeting

Specific geolocations

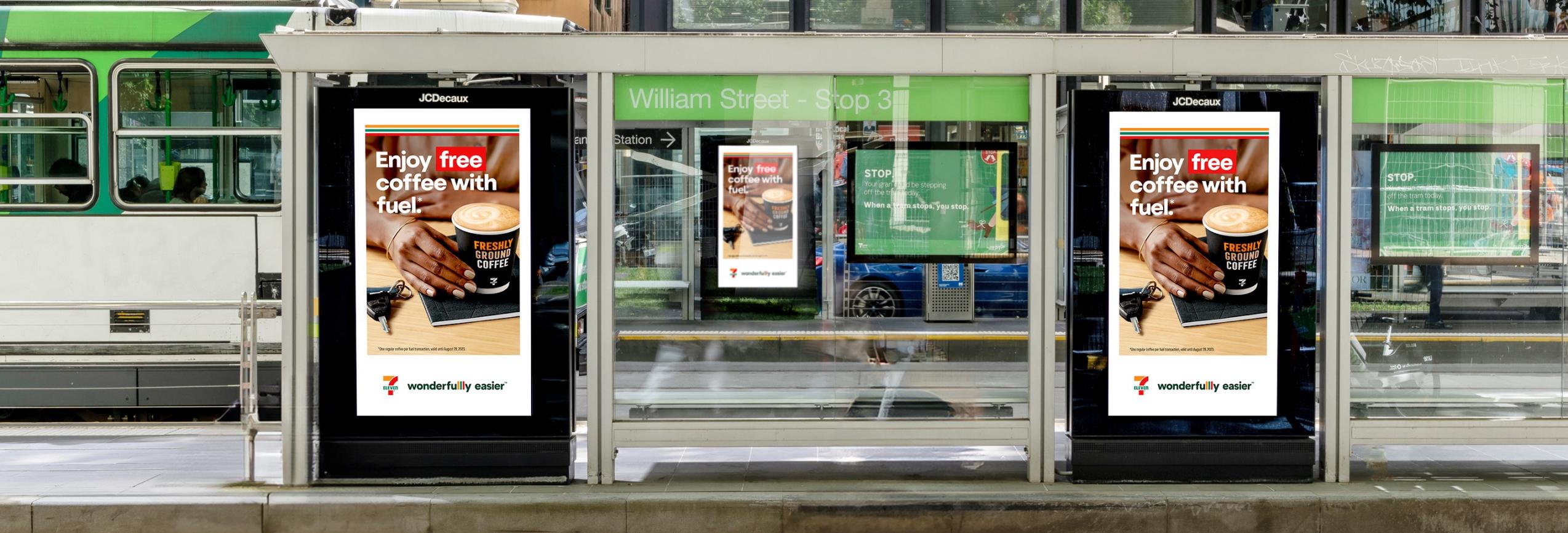
Longevity in market

Day parting

Speed to market

This is more of a  
**PROGRAMMATIC** campaign





# 7-Eleven

Category	Retail / Petro-Convenience
Agency	PHD
DSP	The Trade Desk
Investment	Medium
Formats	Digital Small Format, Rail
Markets	NSW, VIC, QLD & WA

Programmatic  
Out-of-Home drove  
**76%**  
of conversions

## Campaign background

7-Eleven sought to promote its new coffee blend and drive audiences to 7-Eleven stores. As a test and learn, programmatic Out-of-Home featured alongside BVOD, SVOD and Audio.

7-Eleven used A/B creative testing to test two messages, including a promotional “free coffee with fuel” message and positive consumer reviews of the new coffee blend.

## Results

7-Eleven’s footfall attribution analysis identified programmatic Out-of-Home as the most powerful conversion driver, outshining other channels.

- #1 68k footfall conversions to 7-Eleven stores
- #2 Programmatic Out-of-Home drove 76% of conversions
- #3 Average time between exposure and conversion outpaced other channels
- #4 2.3x higher conversion rate with pDOOH + BVOD (vs. BVOD alone)

Investment: Low: <\$50k, Medium: \$50-99k, High: \$100k+  
Source: GroupM & Wavemaker

# What can **accelerate** growth with key direct IO advertisers?

## GROWTH ACCELERATORS

### ACCELERATOR 1

#### COMPETITIVE CPM'S

Scaling of programmatic unlocking more competitive CPMs with MOVE2 adding essential standardisation

### ACCELERATOR 2

#### EDUCATION

Deeper education of programmatic benefits, case studies and reporting capabilities – especially compared to direct IO tactics

### ACCELERATOR 3

#### TECH ENHANCEMENTS

Technology enhancements to ease transaction tensions and elevate prDOOH capabilities

JCDecaux

JCDecaux PROGRAMMATIC

Programmatic **meets**  
Direct 10 Out-of-Home