

attitudes to
programmatic
digital out of home

august 2025

thank you
to our dooh
council



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methodology

- The *Attitudes to Programmatic Digital Out-of-Home Advertising* industry survey was carried out in July/August 2025.
- The aim of this yearly study is to understand the state of play for programmatic and all digital out of home media trading in Australia, exploring the needs of buyers and opportunities for growth as the market develops. This information helps the IAB DOOH Council with prioritisation for the development of industry standards, resources and education.
- The survey collected responses from 116 advertising decision makers from ad agencies who have experience with programmatic digital out of home advertising.
- A similar survey has previously been conducted in March 2024, May 2021 and July 2022 and these published reports are available on the IAB Australia website.

executive summary

Adoption and planning

- Programmatic Digital Out-of-Home (pDOOH) Advertising is continuing its evolution from experimentation toward regular consideration and integration in media plans. Usage of private marketplace and guaranteed buying methods is rising.
- Programmatic agency teams have gained greater influence over pDOOH decisions, complementing planning teams. Eight in ten agencies are planning OOH, DOOH and pDOOH advertising within the same team. Integration with buying other forms of digital media is also high, in particular the collaborative planning and buying with digital video advertising.

Creative and targeting

- Targeting capabilities, flexible buying options, and data usage remain key purchase drivers for pDOOH advertising.
- Use of DSP- and media-owner-supplied data for targeting and creative has increased notably.
- Dynamic Creative Optimisation (DCO) has seen the greatest growth year on year amongst digital out of home creative formats.

Objectives

- Brand awareness continues as the predominant objective for pDOOH campaigns, aligning pDOOH more closely with digital video than retail media's lower-funnel focus.

Measurement

- Importance of holistic, cross-media measurement tools for assessing DOOH advertising effectiveness is growing. Ad delivery metrics are most frequently used, though calls remain for standardised definitions.

Barriers inhibiting growth

- While understanding of pDOOH has improved, lack of knowledge—especially on cost versus benefit—remains the top barrier to increasing share of ad spend. Calls for clearer industry education, benchmarks, transparent audience data, and practical creative guidance are strong.

Strategic trends

- Over half of agencies have a strategic focus on reducing carbon emissions in programmatic investment, though this is lower than in Europe. AI exploration in DOOH is led by audience segmentation, but at slightly lower levels than for broader media. Two-thirds expect future Australian privacy reforms to impact DOOH opportunities, though many are uncertain.

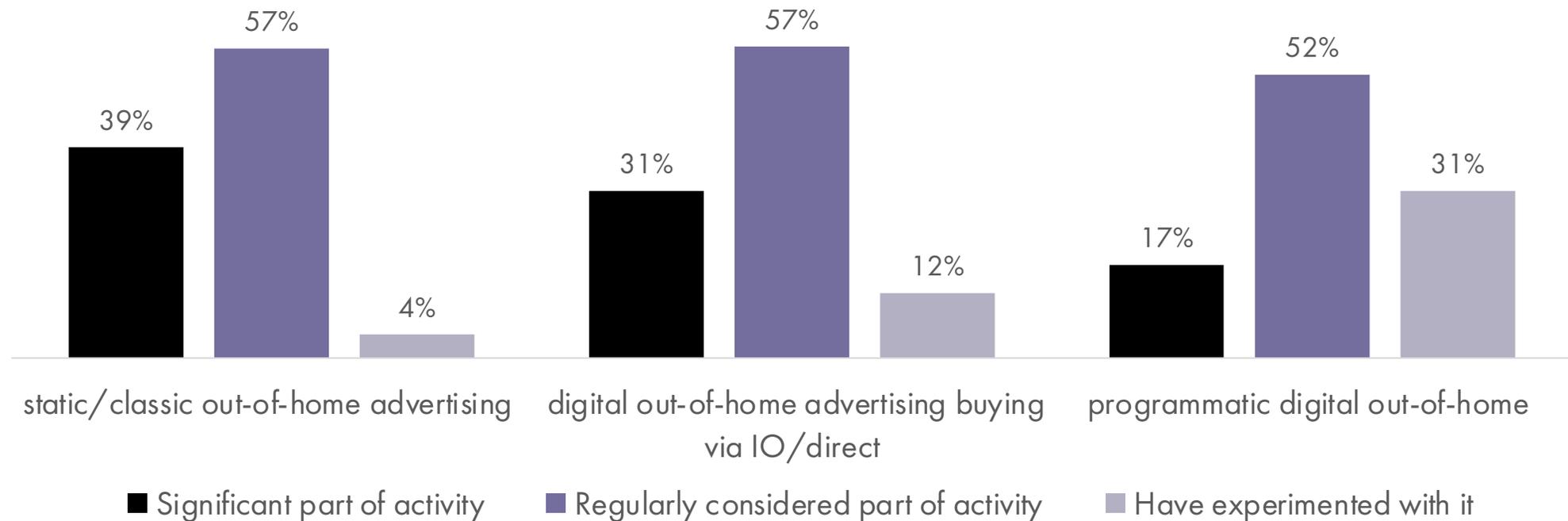
Outlook

- The report signals maturing adoption, increasing integration with broader programmatic strategies, and rising sophistication in creative, targeting, and measurement. Addressing knowledge gaps, standardising metrics, and providing transparent, evidence-based resources will be key to unlocking further pDOOH growth.

experience with out of home advertising

Amongst agency respondents using digital out of home advertising buying via IO/direct, 88% have it as a significant or regularly considered part of their activity. Amongst those using programmatic digital out-of-home, 69% have it as a significant or regularly considered part of their activity.

experience with out of home advertising amongst agencies using each format

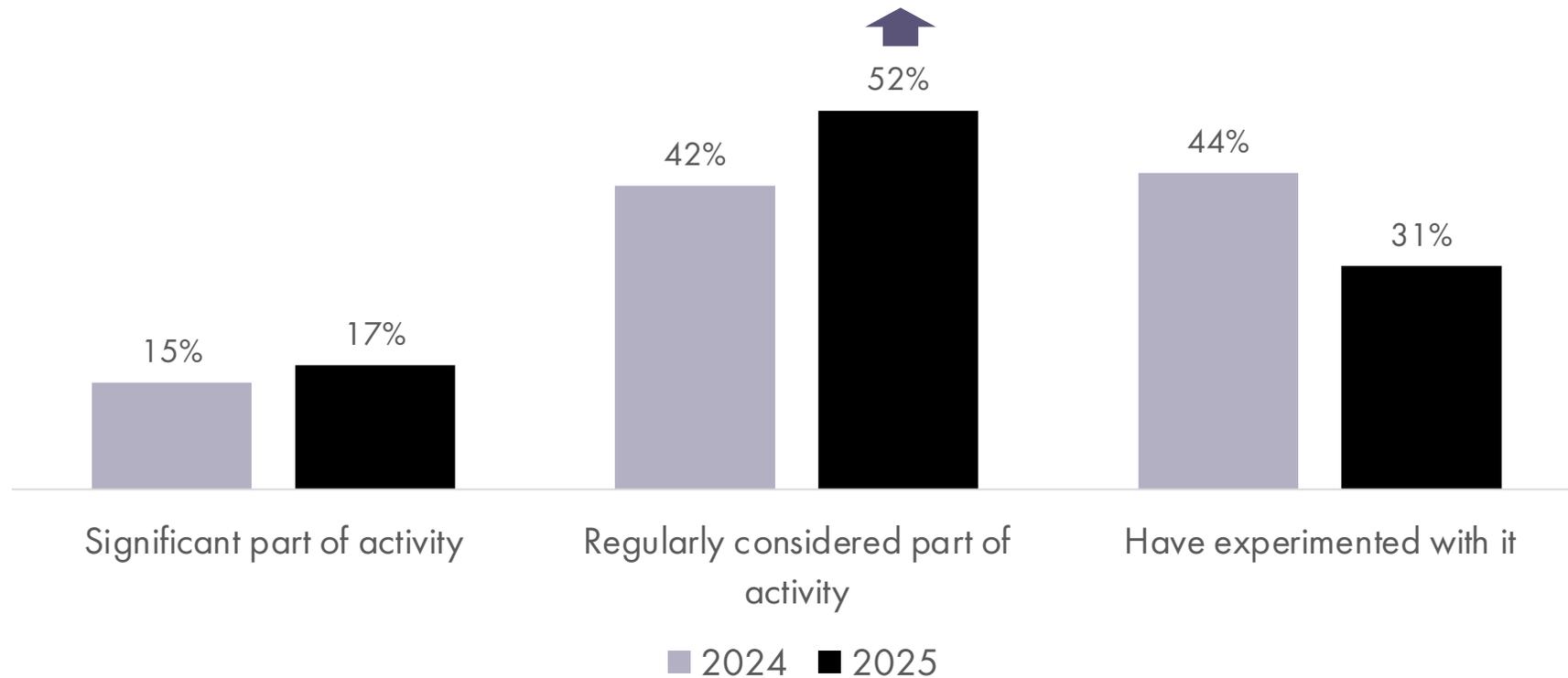


Source: IAB Australia Attitudes to Programmatic Digital Out of Home Report 2025 n=116 decision makers in ad agencies

Q - Which of these best describes your organisation's experience with <static/classic out-of-home>,<digital out-of-home advertising buying via IO/direct >,<programmatic digital out-of-home > advertising to date?

there has been a shift in experience with programmatic DOOH advertising from experimentation to regular consideration

level of experience with programmatic digital out of home advertising amongst agencies users

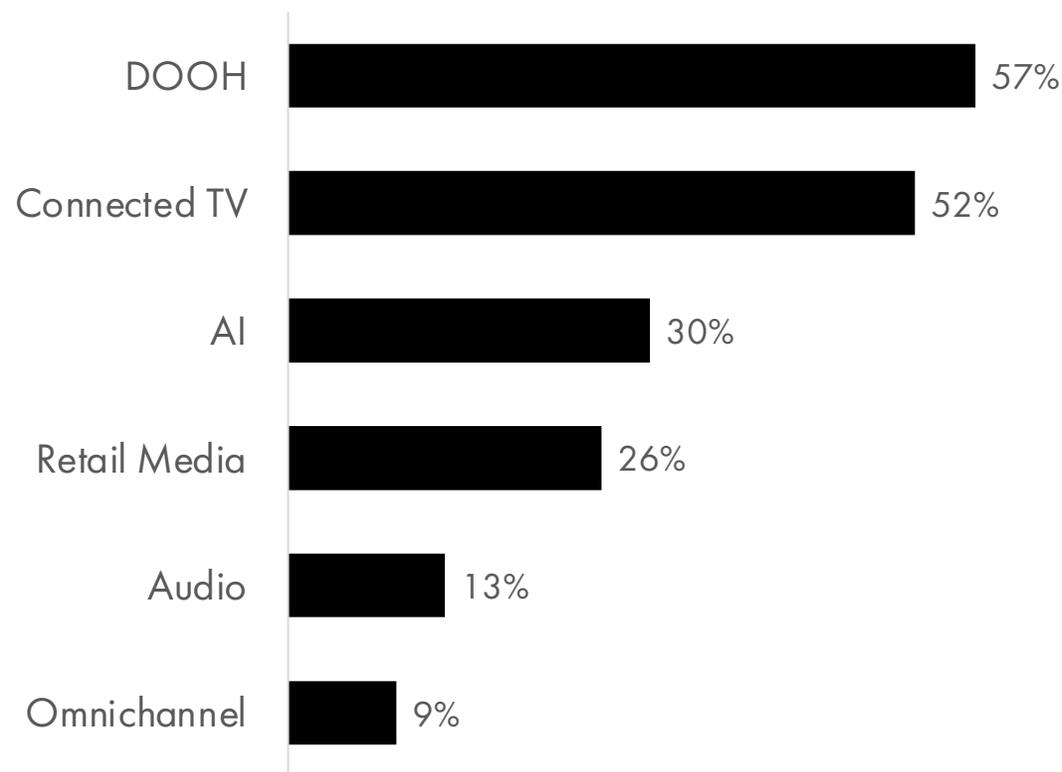


Source: IAB Australia Attitudes to Programmatic Digital Out of Home Report 2025 n=116 decision makers in ad agencies
Q - Which of these best describes your organisation's experience with <programmatic digital out-of-home > advertising to date?

European agencies seeing DOOH as a key programmatic growth area this year

The 2024 IAB Europe Attitudes to Programmatic Report highlights trends in programmatic advertising across Europe, reflecting a decade of evolution. This year's findings reveal an increasingly mature market along with demand for programmatic in emerging media including DOOH.

key programmatic growth areas for European agencies this year



Source: IAB Europe's Attitudes to Programmatic Advertising Report 2024 <agency respondents>

Q – What do you think will be the key programmatic growth areas over the next 12 months?

programmatically agency teams now have greater influence on participation in programmatic DOOH

Within agencies, planning teams continue to have the most influence on participation in programmatic digital out-of-home advertising, however the influence of agency programmatic teams has significantly increased over the last year.

influence within agencies on participating in programmatic digital out of home advertising



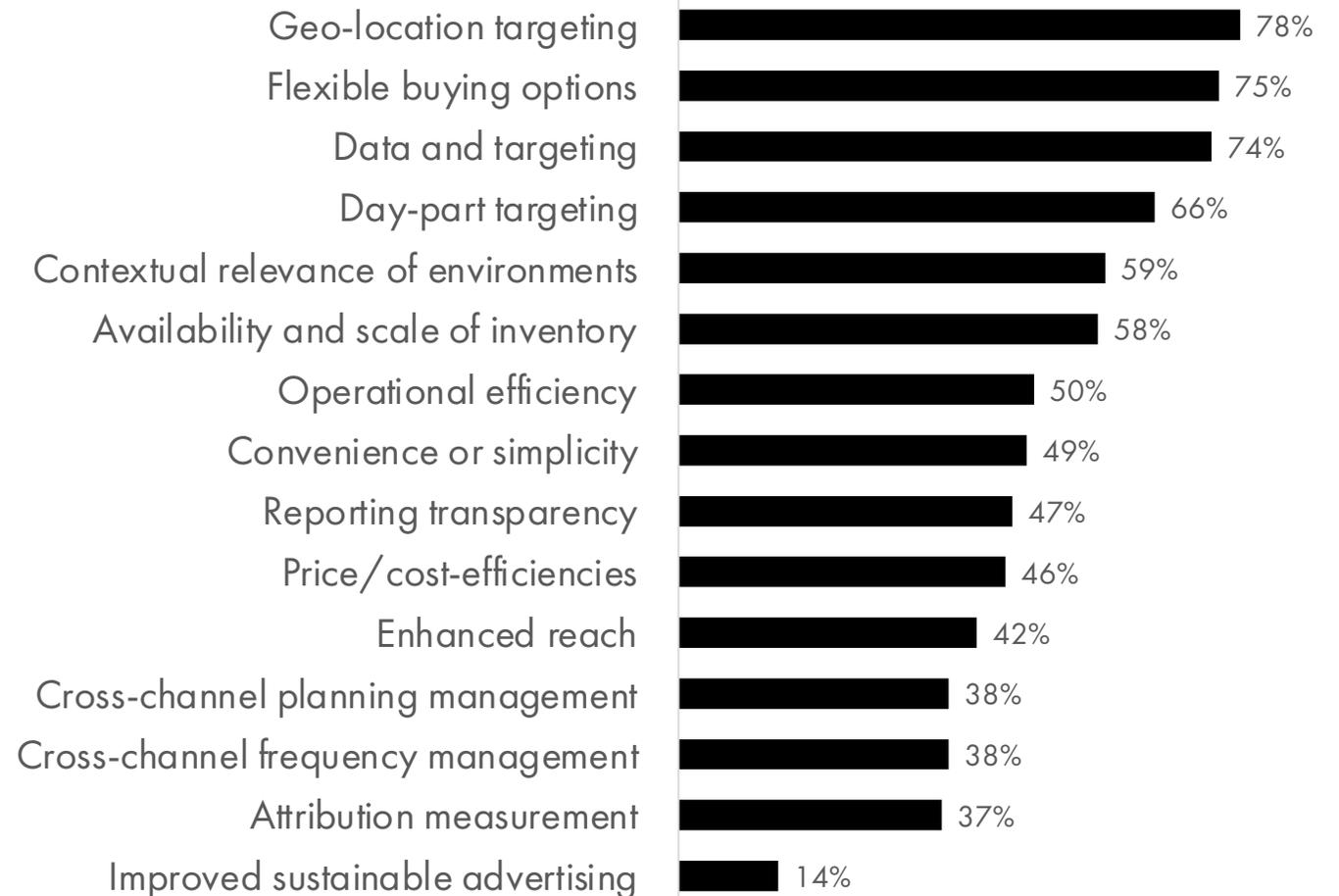
Source: IAB Australia Attitudes to Programmatic Digital Out of Home Report 2025 n=116 decision makers in ad agencies
 Q - Within your agency, who is having the most influence on participation in programmatic digital out-of-home advertising? (Select all that apply)

targeting capabilities and flexibility are major drivers of programmatic digital out of home advertising

Data and targeting along with flexible buying options continue to be the top drivers of buying digital out-of-home advertising programmatically.

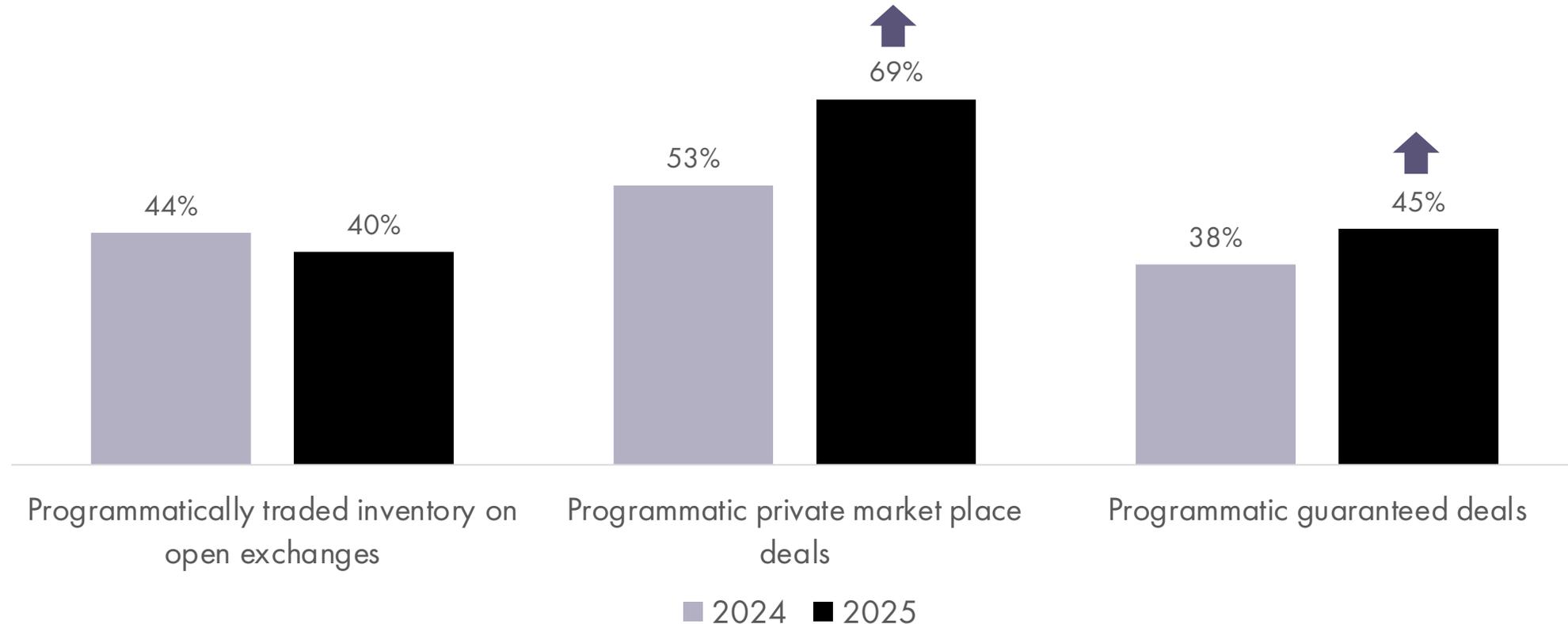
The list of drivers has been expanded on the previous survey and geo-location data has come out as the #1 factor for buying pDOOH this year.

major factors for buying programmatic DOOH advertising



usage of programmatic private marketplace and guaranteed buying methods for digital out of home have increased

programmatic advertising buying methods used for digital out of home

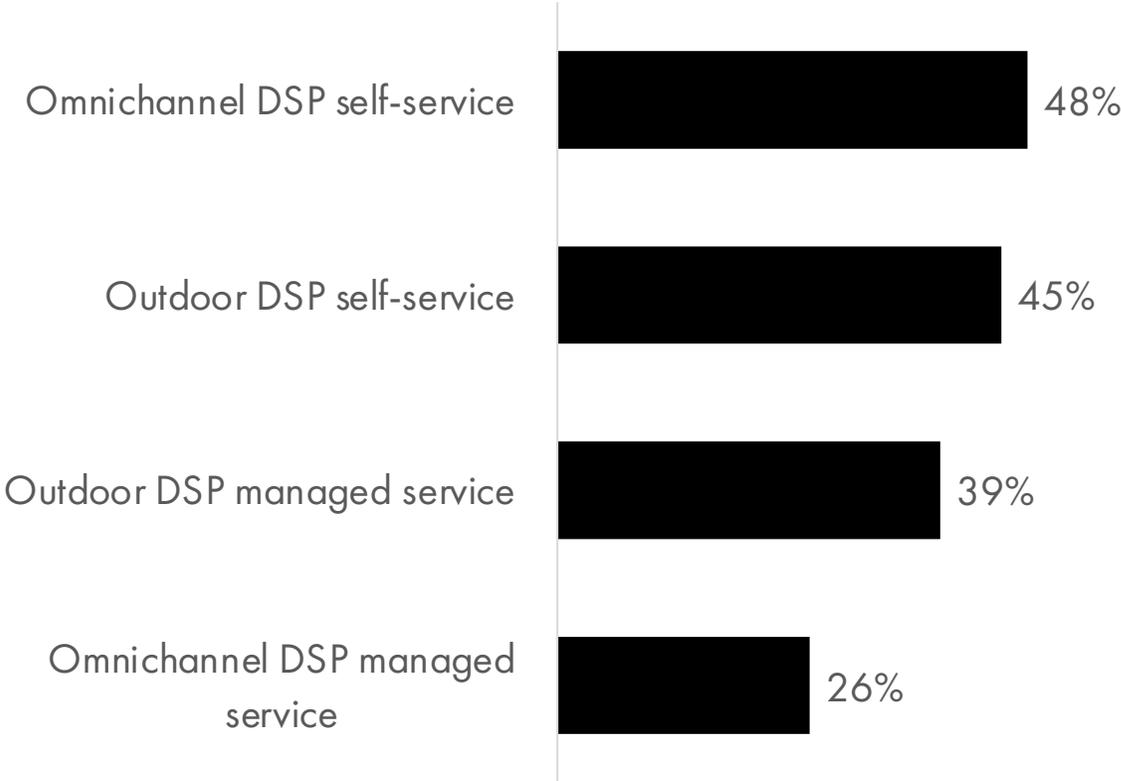
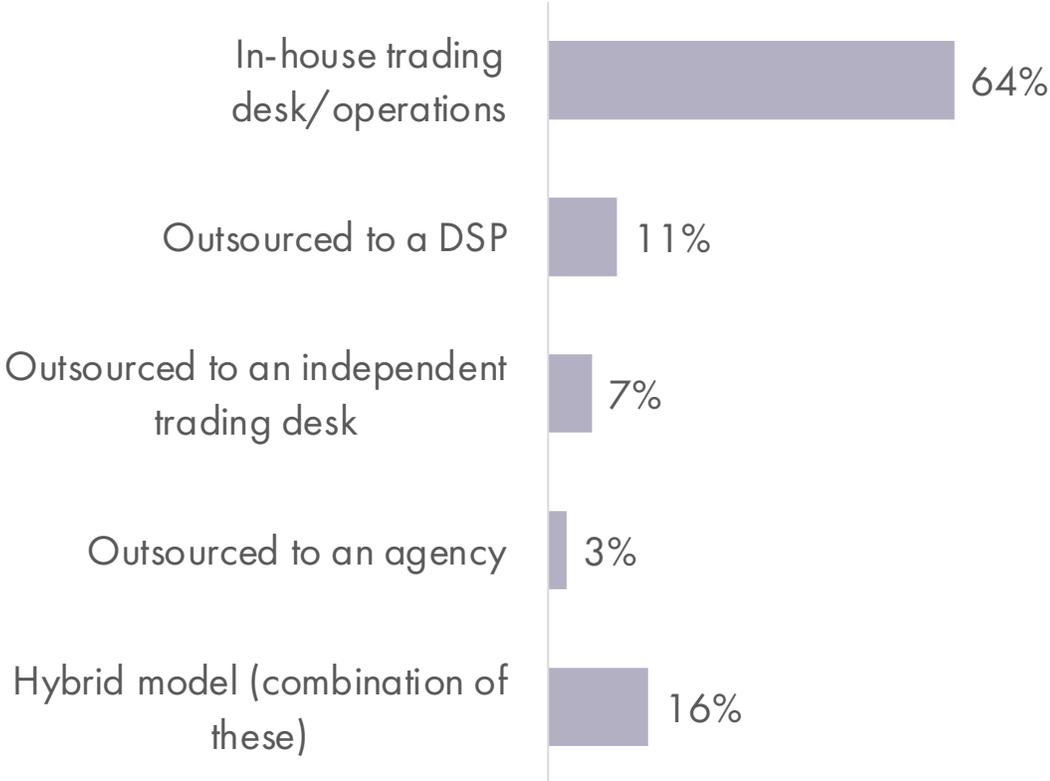


Source: IAB Australia Attitudes to Programmatic Digital Out of Home Report 2025 n=116 decision makers in ad agencies
Q - Which of the following programmatic advertising buying methods have you used for digital out-of-home? (Select all that apply)

operational models and services used for programmatic DOOH

operational models for executing programmatic digital out of home buying

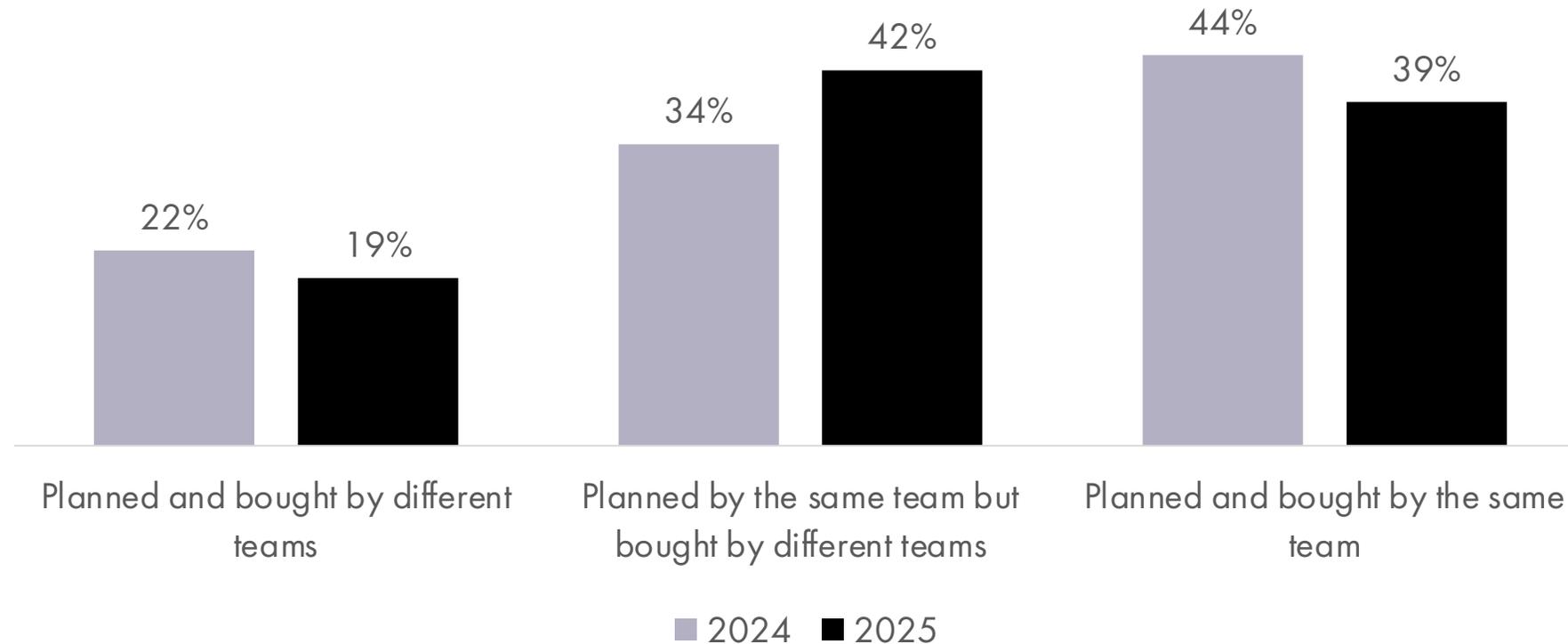
services used for buying programmatic digital out of home advertising



Source: IAB Australia Attitudes to Programmatic Digital Out of Home Report 2025 n=116 decision makers in ad agencies
 Q - What operational model do you currently have in place for executing programmatic digital out-of-home buying?
 Q - Through which services has the programmatic digital out-of-home advertising you've been involved with typically been bought? (Select all that apply)

8 in 10 agencies (81%) are planning OOH, DOOH and programmatic DOOH advertising within the same team

OOH/DOOH and programmatic DOOH advertising planning and buying

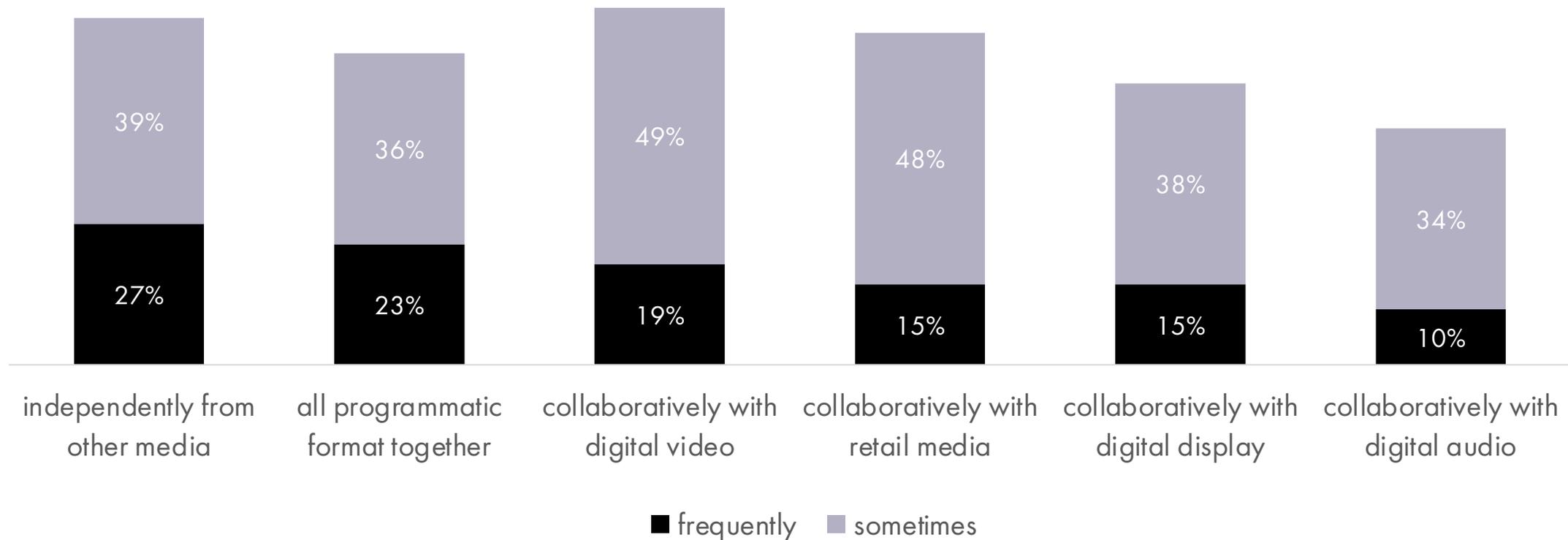


Source: IAB Australia Attitudes to Programmatic Digital Out of Home Report 2025 n=116 decision makers in ad agencies
Q - Which of the following programmatic advertising buying methods have you used for digital out-of-home? (Select all that apply)

nearly 7 in 10 plan and buy programmatic DOOH with digital video

68% of agency respondents frequently or sometimes plan and buy programmatic DOOH advertising with digital video advertising, up from 60% last year. Planning and buying with other formats has remained stable year on year.

planning and buying programmatic DOOH advertising with other ad formats



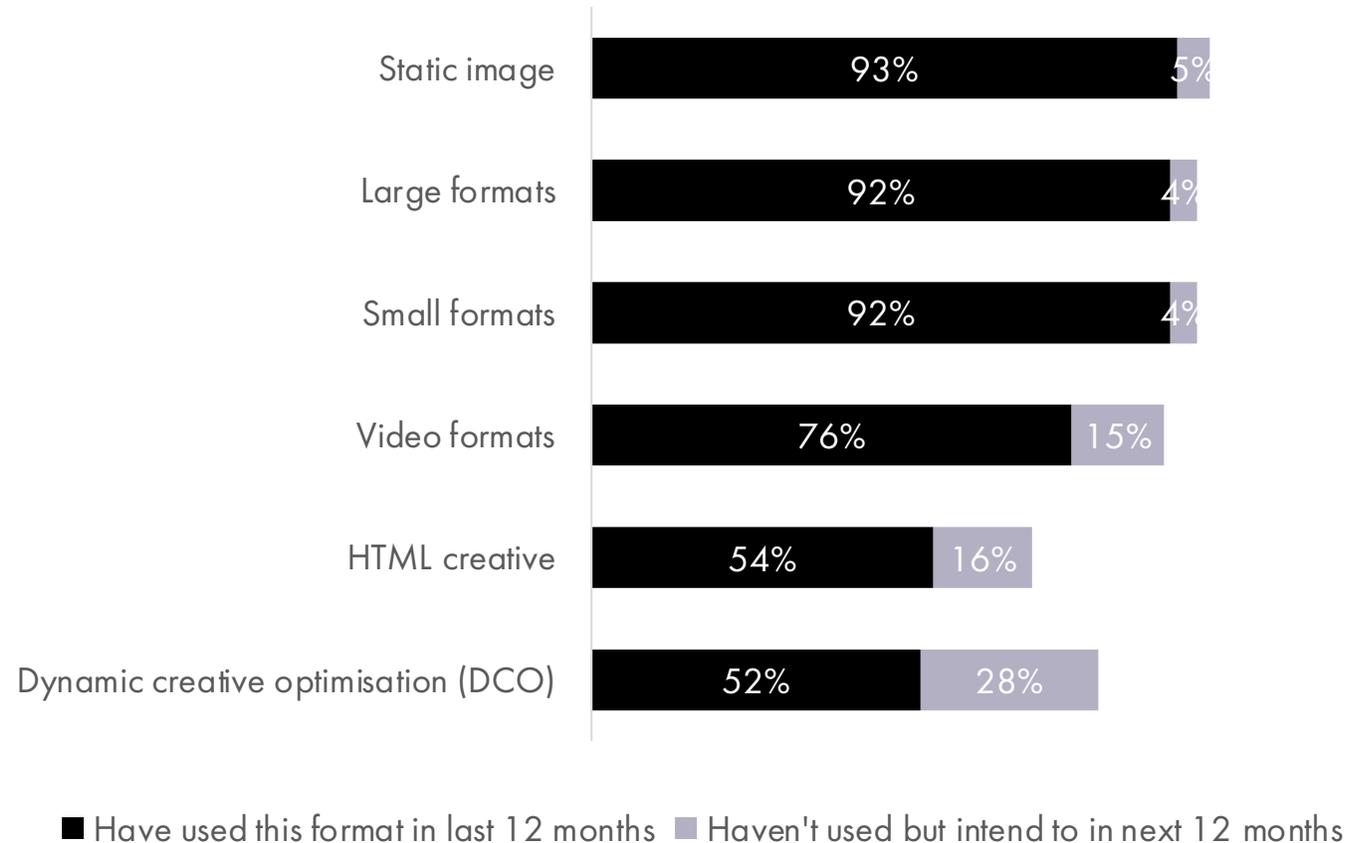
Source: IAB Australia Attitudes to Programmatic Digital Out of Home Report 2025 n=116 decision makers in ad agencies
Q - When buying programmatic digital out-of-home which of the following best describes where it typically fits into your campaign plan?

greatest growth in Dynamic Creative Optimisation

Over half of agencies (52%) have used Dynamic Creative Optimisation (DCO) in the last 12 months.

While all formats have grown in usage year on year, DCO is up 16% pts on last year (from 36% in 2024). A further 28% who haven't yet used DCO intend to in the next 12 months.

creative formats used or plan to use for digital out of home advertising

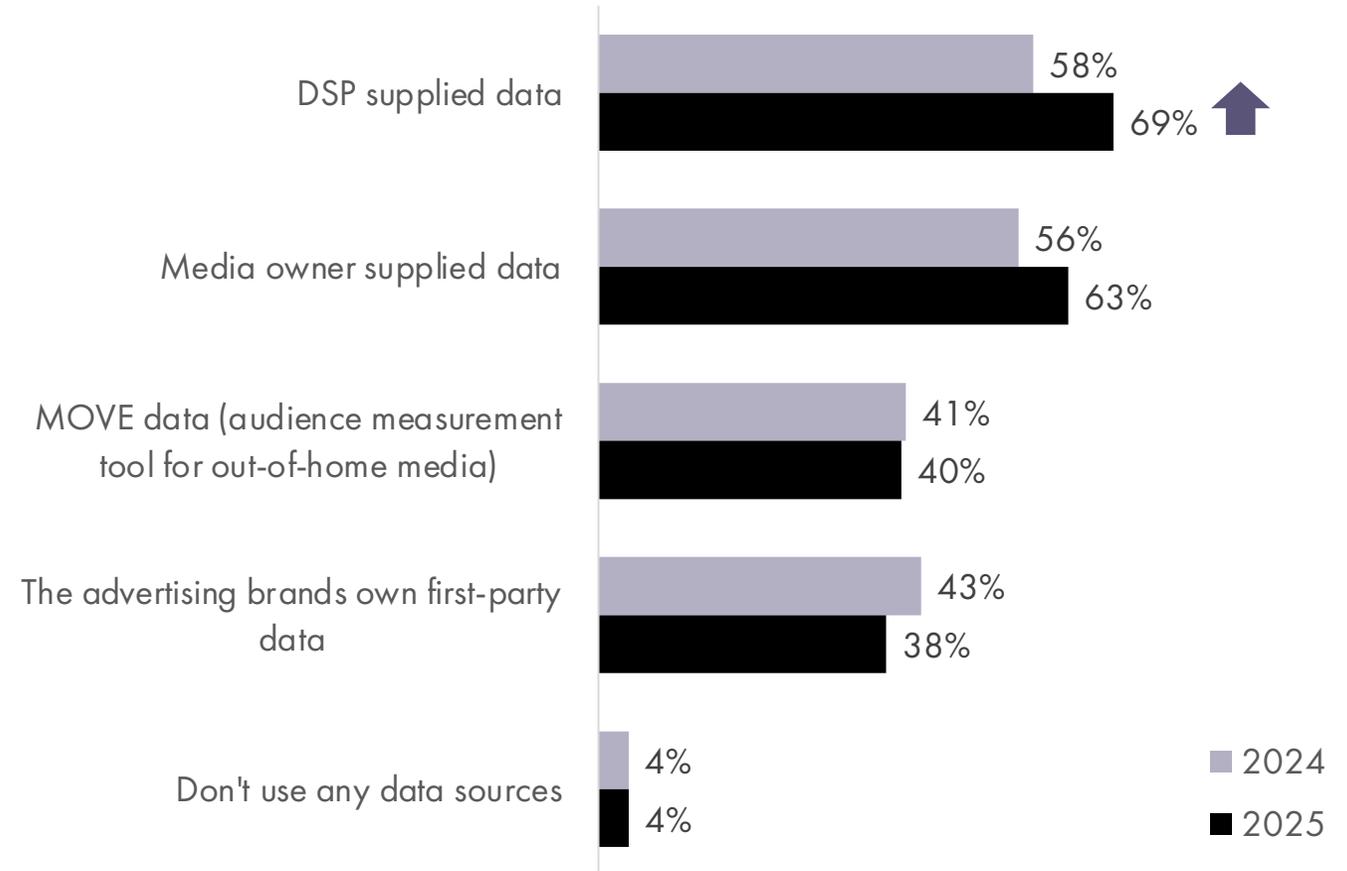


usage of DSP supplied data for targeting and creative has increased significantly

Nearly 7 in 10 agencies are using DSP supplied data to inform targeting and creative for programmatic digital out of home advertising (69%, up from 58% in 2024).

The usage of media owner supplied data has also increased year on year to 63%.

data sources being used to inform targeting and creative for programmatic digital out of home advertising

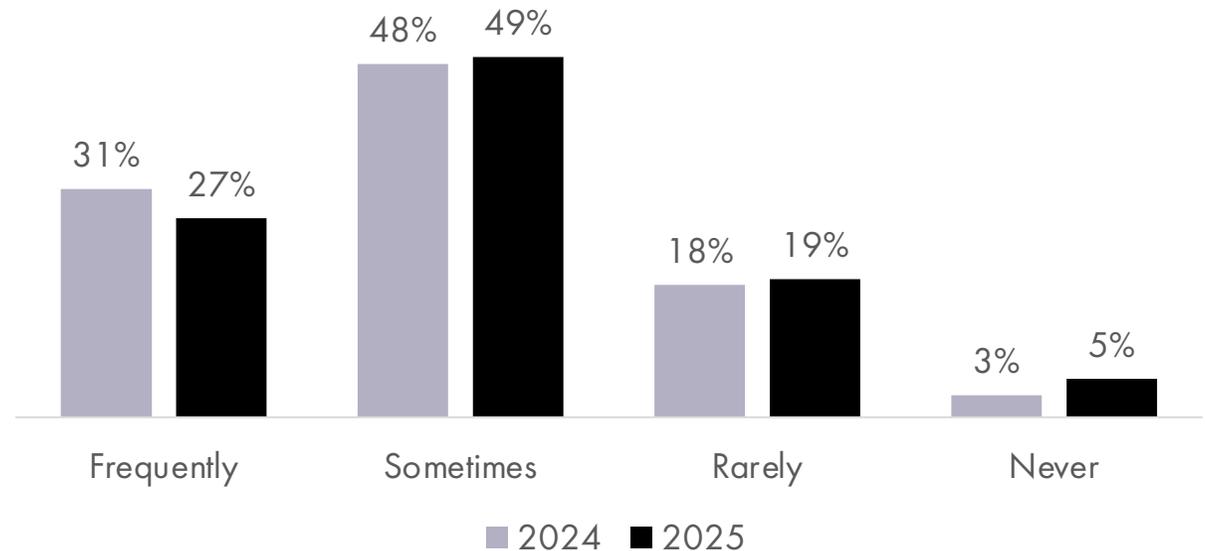


Source: IAB Australia Attitudes to Programmatic Digital Out of Home Report 2025 n=116 decision makers in ad agencies
Q - Which of the following data sources is your company/client using to inform targeting and creative for programmatic digital out-of-home advertising (Select all that apply)

adjusting creative to suit the viewing environment

When running omnichannel campaigns programmatically (e.g. including display, video, audio, CTV etc), 76% of agencies at least sometimes adapt the creative to suit the relevant DOOH viewing environment, this is similar to last year (79%).

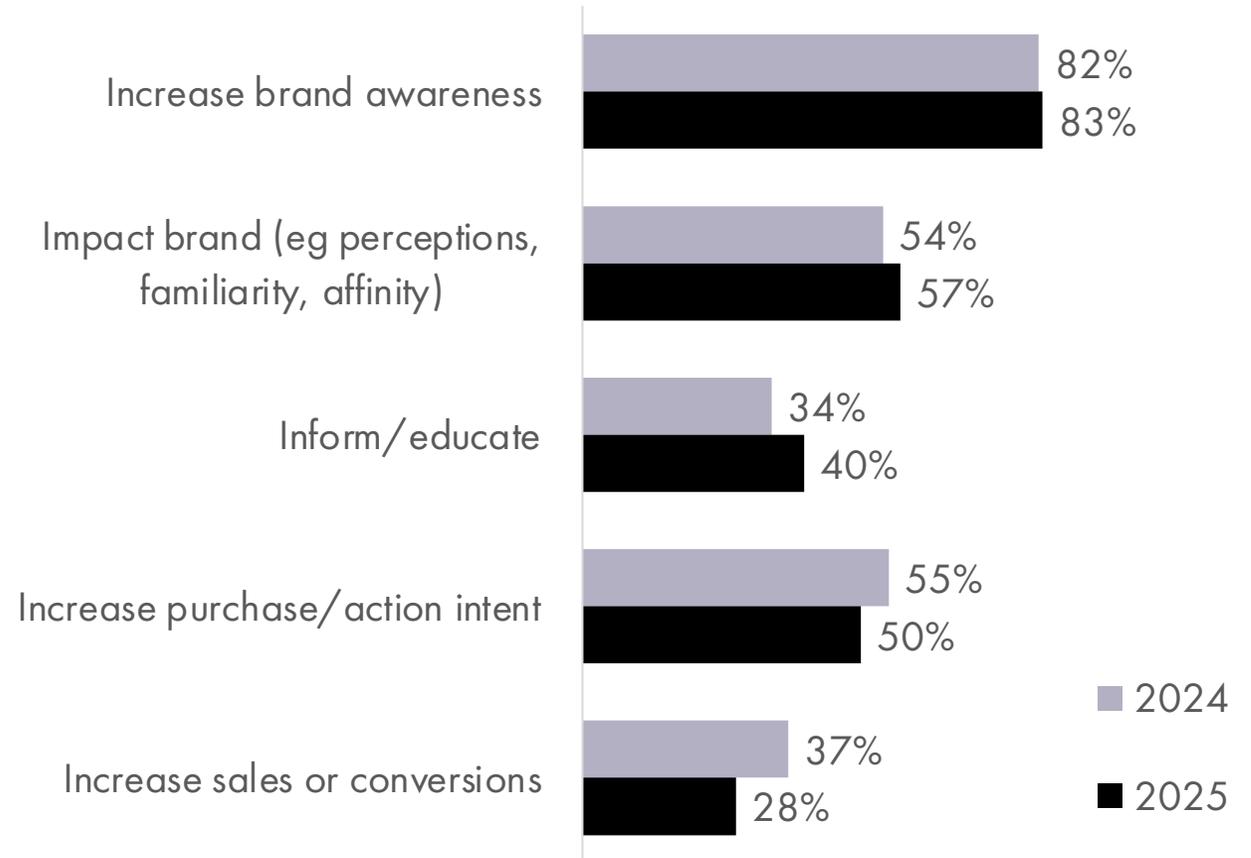
frequency creative is adapted to suit DOOH viewing environments



campaign objectives focused on branding

Increasing brand awareness remains the predominant objective for programmatic digital out of home advertising campaigns amongst agencies over the last year, as it has been for previous survey waves.

campaign objectives of programmatic digital out of home advertising

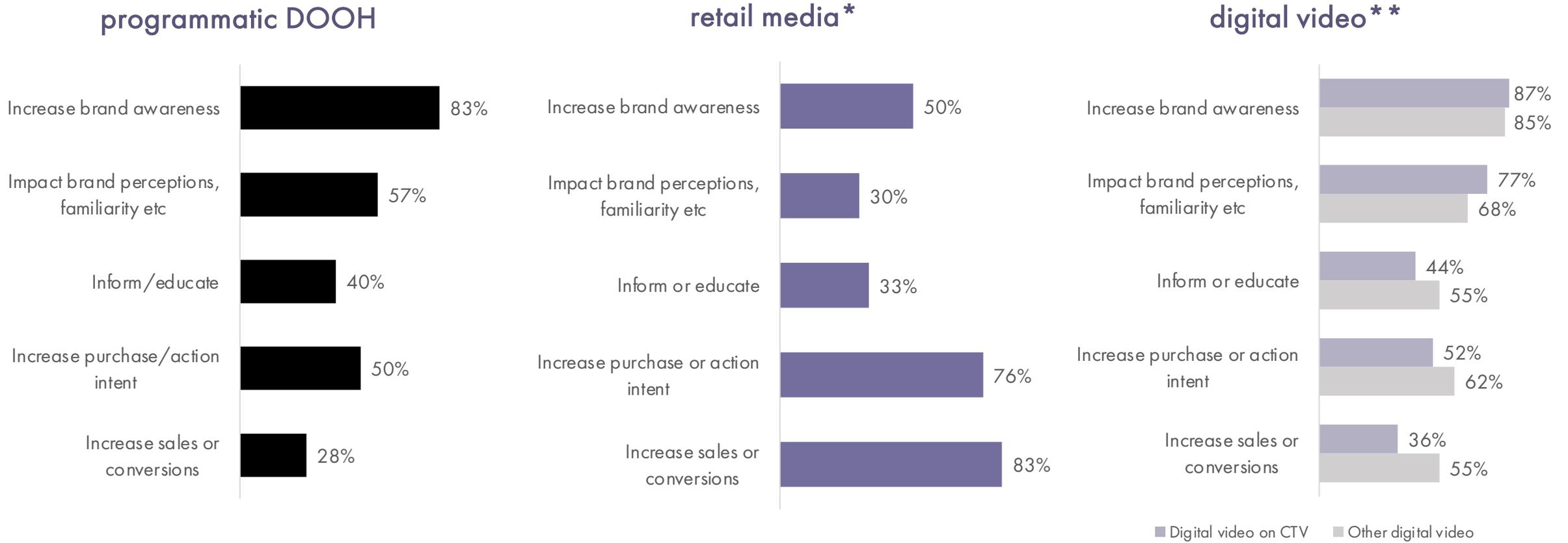


Source: IAB Australia Attitudes to Programmatic Digital Out of Home Report 2025 n=116 decision makers in ad agencies

Q - What have been the objectives of the programmatic digital out-of-home advertising activities you've been involved with over the past year? (Please select all that apply)?

campaign objectives across digital ad formats

Compared to the objectives of other digital advertising formats (collected via IAB State of the Nation industry surveys), programmatic DOOH is similar to digital video with a focus on upper funnel objectives, whereas retail media is being used more for lower funnel objectives.



Source: IAB Australia Attitudes to Programmatic Digital Out of Home Report 2025 n=116 decision makers in ad agencies

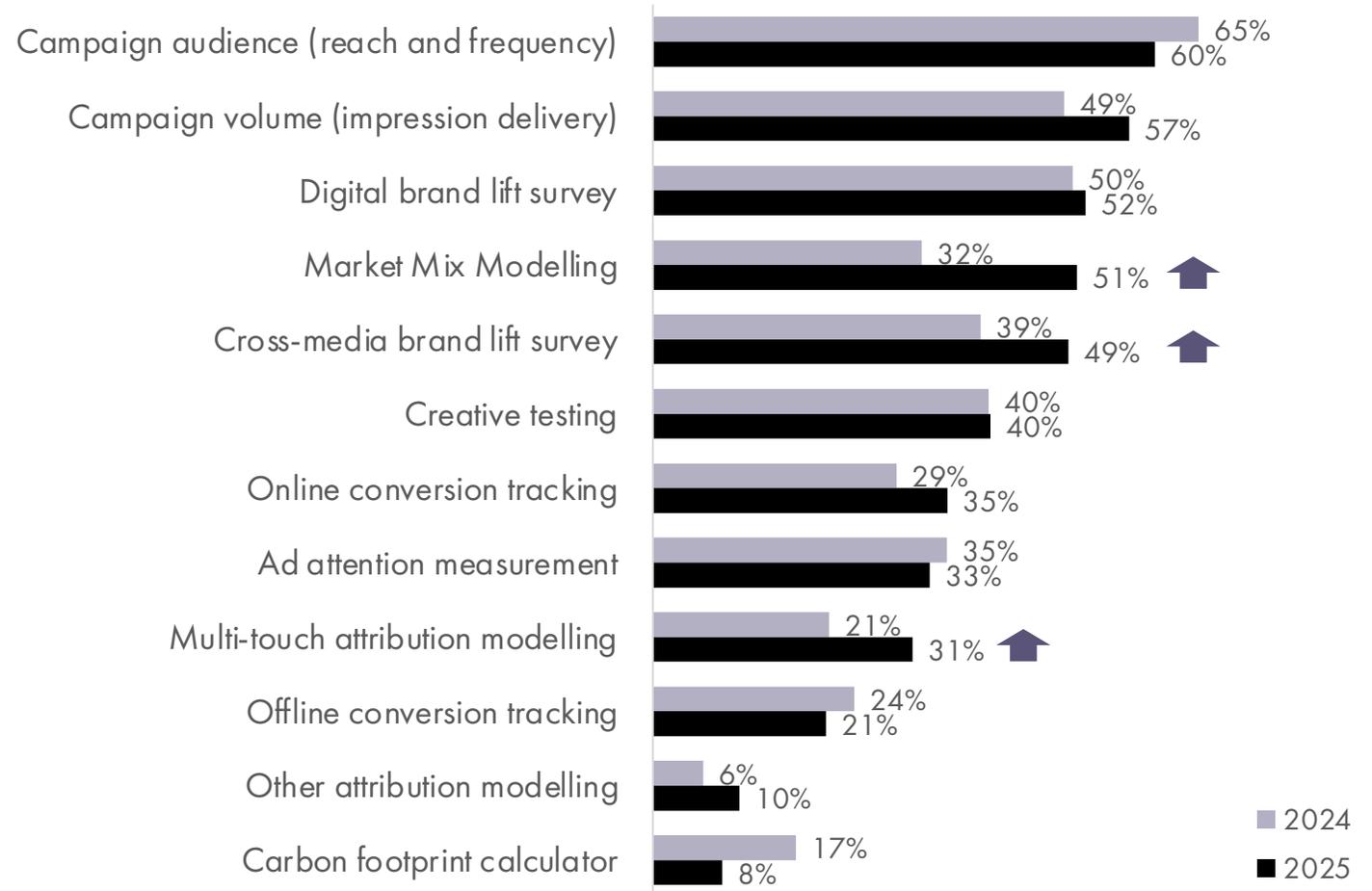
Q - What have been the objectives of the programmatic digital out-of-home advertising activities you've been involved with over the past year? (Please select all that apply)?

*IAB Australia Retail Media State of the Nation 2025 ** IAB Australia Video Advertising State of the Nation 2025

increasing importance of cross-media measurement tools

While campaign audience and volume reporting remain the most important tools amongst agencies for assessing the effectiveness of out of home advertising investments, there has been a significant increase in the importance of holistic measurement tools that encompass all media such as Market Mix Modelling and cross-media brand lift surveys.

important tools for assessing the effectiveness of programmatic digital out of home campaigns



Source: IAB Australia Attitudes to Programmatic Digital Out of Home Report 2025 n=116 decision makers in ad agencies

Q - When assessing the effectiveness of your out-of-home and digital out-of-home advertising investment, which of the following measurement tools are important to you? (select all that apply)

ad delivery metrics are most frequently used to assess programmatic DOOH campaigns

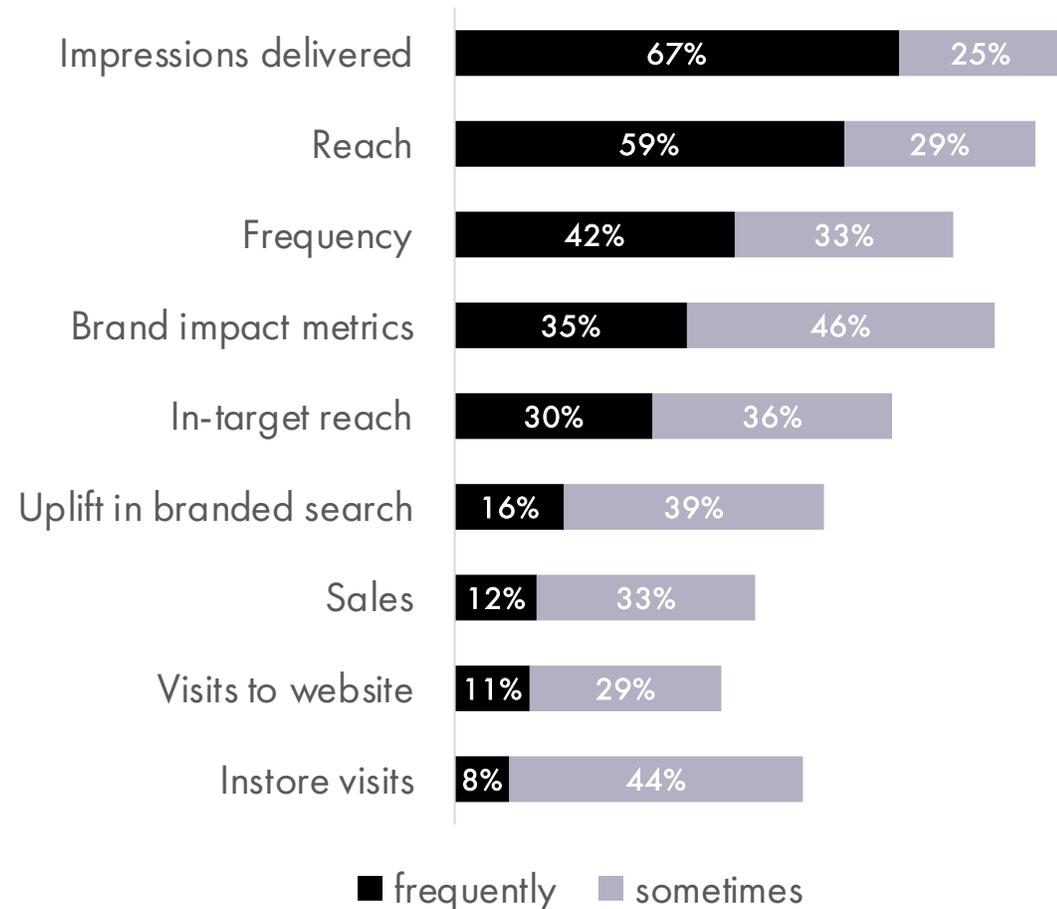
Ad delivery metrics (impressions and reach & frequency) are the most frequently used metrics amongst agencies to assess effectiveness of programmatic DOOH campaigns.

Increasing brand awareness remains the predominant objective for programmatic DOOH amongst agencies and 81% are at least sometimes using brand impact metrics to assess effectiveness.

“To support further investment, the industry could provide clearer, standardised definitions of key metrics like impressions and audience reach within the context of programmatic DOOH.”

- Agency respondent

metrics used to assess effectiveness of programmatic digital out of home campaigns

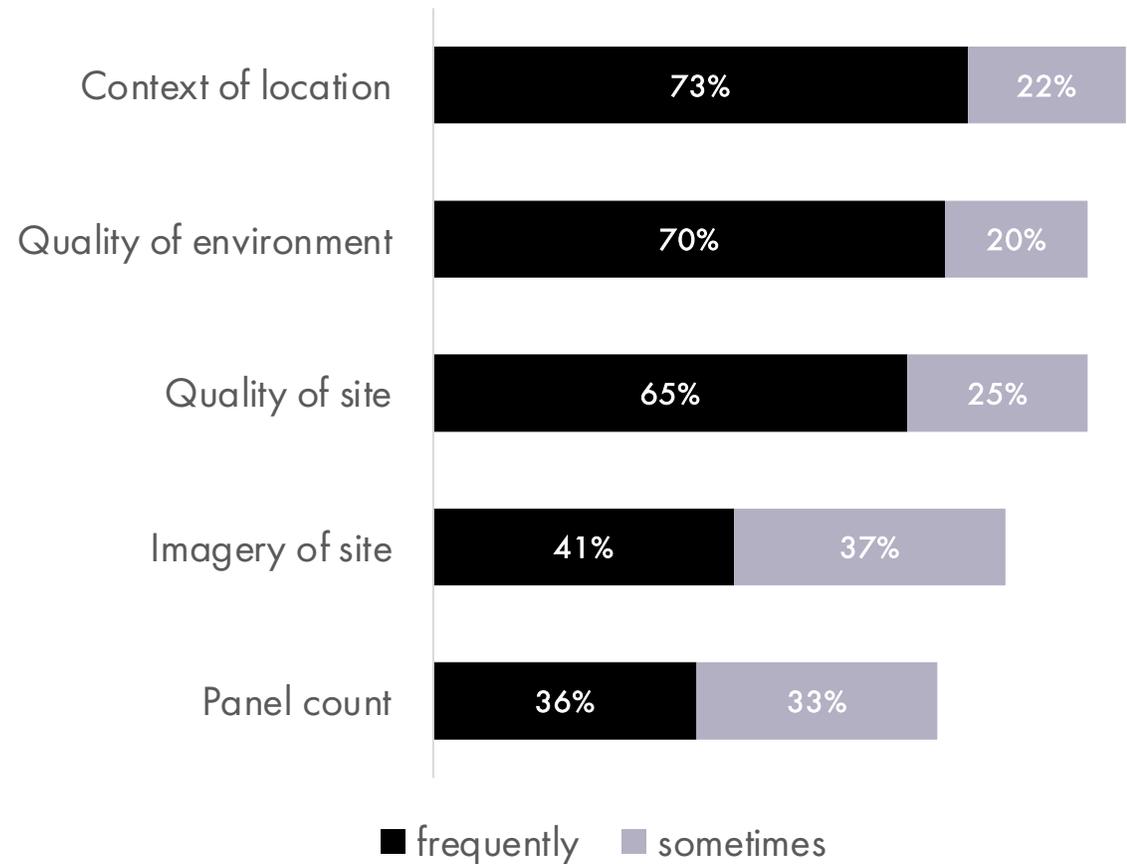


location and quality metrics considered when buying programmatic DOOH

9 in 10 agencies at least sometimes consider context and location and quality of environment and site metrics when using programmatic DOOH advertising.

"The industry could benefit from standardisation and using the same terminology and measurement metrics across both pDOOH and direct IO DOOH/OOH."
- agency respondent

classic out of home buying metrics considered when using programmatic digital out of home advertising

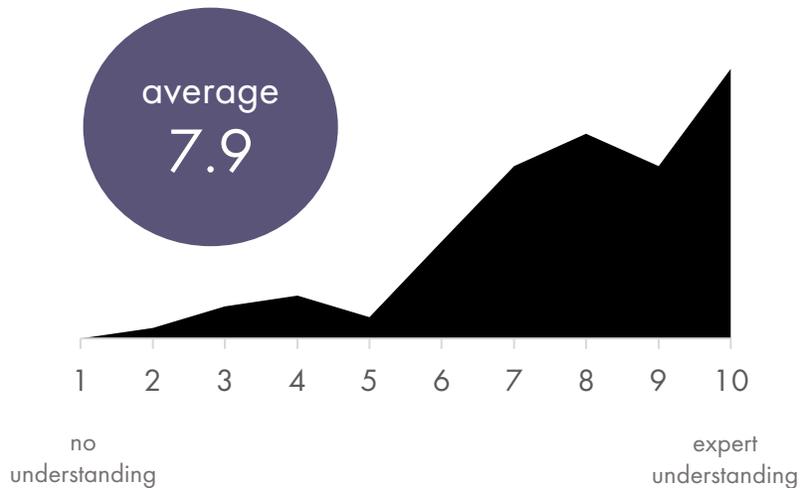


agency understanding of programmatic DOOH is increasing

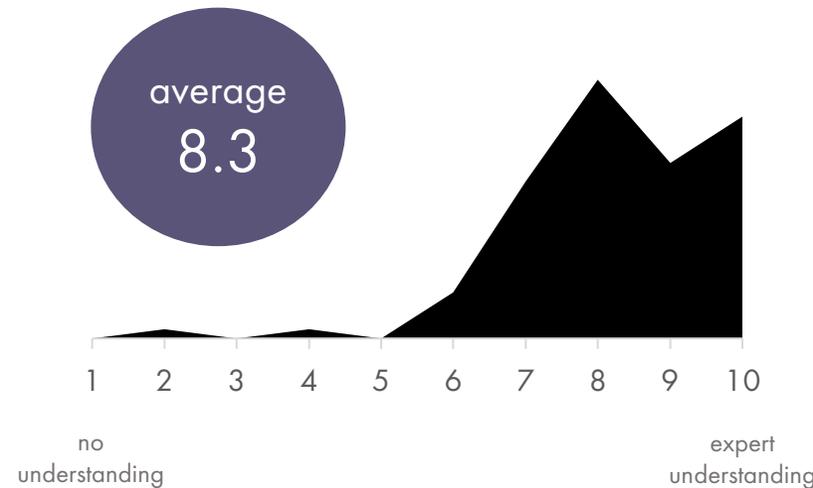
Understanding of programmatic DOOH advertising remains lower than the understand of classic and digital out-of-home advertising, however understanding has increased since last year. On a scale of 1 to 10 where 1 means no understanding at all and 10 means an expert level of understanding, agency respondents gave themselves an average 7.5 on programmatic DOOH, up from 7.0 last year.

understanding of out of home advertising

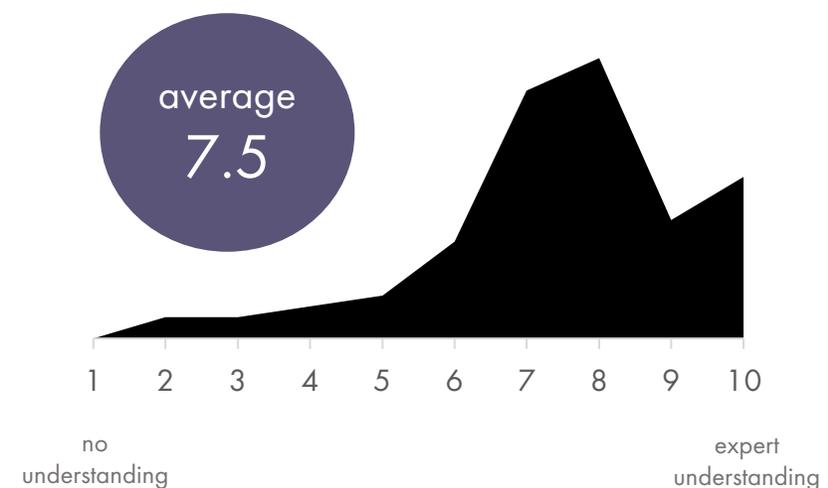
static/classic out-of-home



digital out of home



programmatic digital out of home



Source: IAB Australia Attitudes to Programmatic Digital Out of Home Report 2025 n=116 decision makers in ad agencies

Q - Please rate how well you feel you understand the following forms of out-of-home advertising, where 1 means no understanding at all and 10 means an expert level of understanding?

lack of understanding is still preventing pDOOH getting a larger share

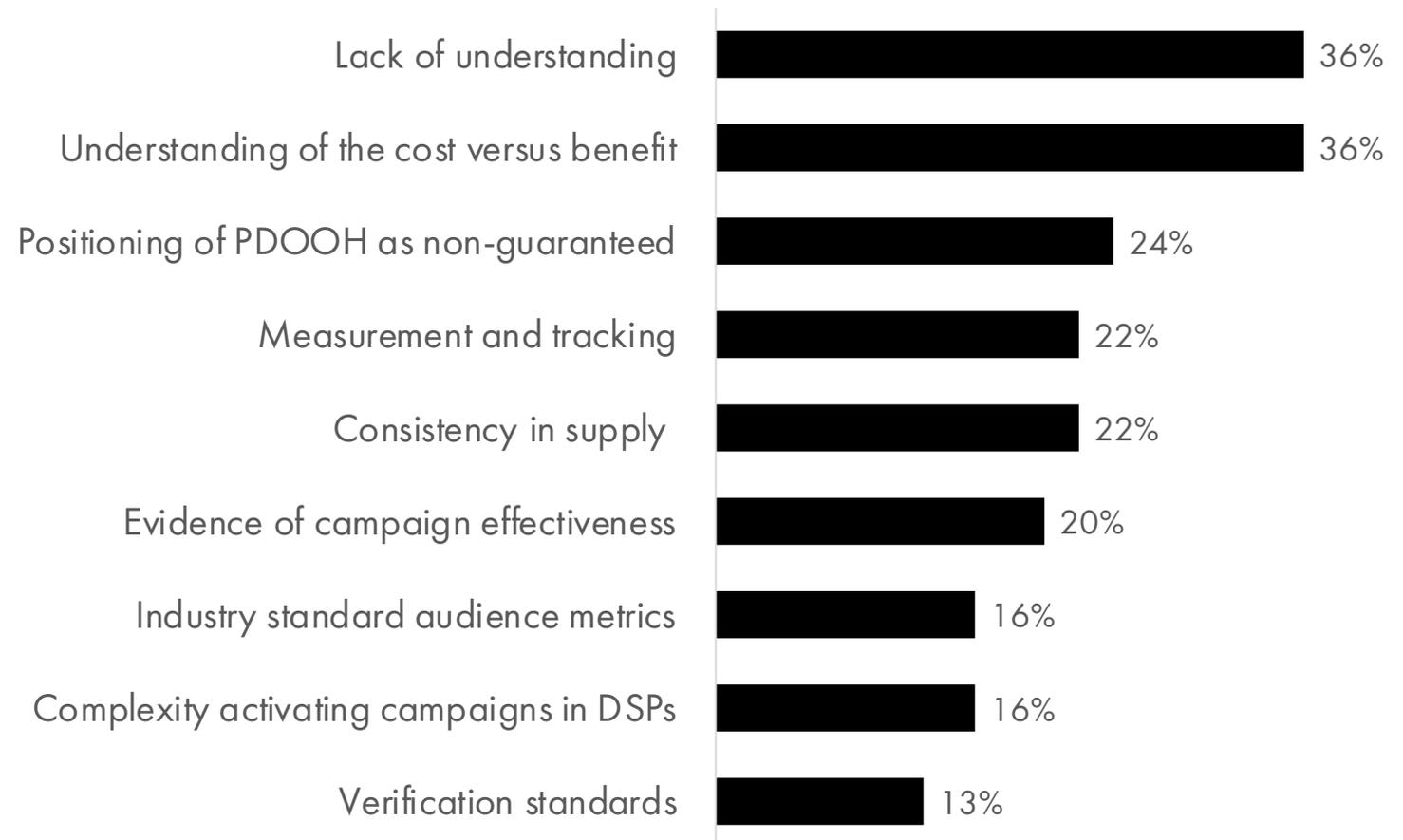
A general lack of understanding and lack of understanding cost versus benefit are the top barriers preventing programmatic digital out of home getting a larger share of ad volume.

Except for understanding of the cost versus benefit, all other barriers have reduced since last year.

“Scale is a barrier. The measurement and integration piece are great, however it doesn’t mean a lot if it only applies to a small portion of the out of home budget. A large benefit to programmatically trading out of home is that it is centralised and everything that comes with that, which is partially lost if most of the buy can’t be traded the same way.”

- agency respondent

barriers preventing programmatic digital out of home getting a larger share of ad volume



lack of understanding continues to prevent programmatic DOOH from being a larger proportion of ad investment, while measurement continues as a barrier for classic and digital OOH

top 3 issues preventing out-of-home advertising from getting a larger share

static/classic out-of-home

1. Measurement and tracking
2. Lead time required
3. Evidence of campaign effectiveness

digital out-of-home

1. Measurement and tracking
2. Evidence of campaign effectiveness
3. Understanding of the cost versus benefit

programmatic DOOH

1. Lack of understanding
2. Understanding of the cost versus benefit
3. Positioning of PDOOH as non-guaranteed

Source: IAB Australia Attitudes to Programmatic Digital Out of Home Report 2025 n=116 decision makers in ad agencies

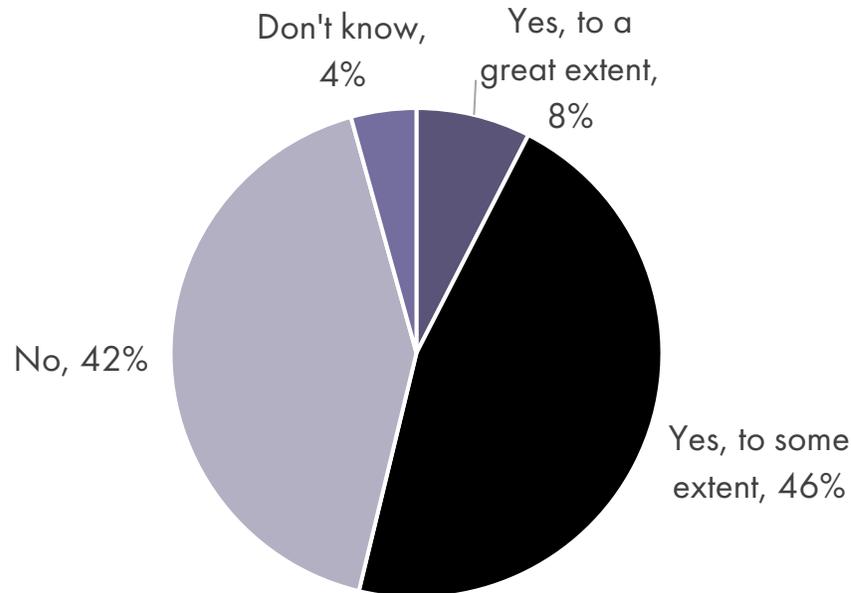
Q - What are the three biggest issues preventing <static/classic out-of-home>, <digital out-of-home>, <programmatic Digital out-of-home> advertising from being a larger proportion of advertising volume?
(Select up to 3 issues)

strategic focus on reducing emissions in programmatic investment

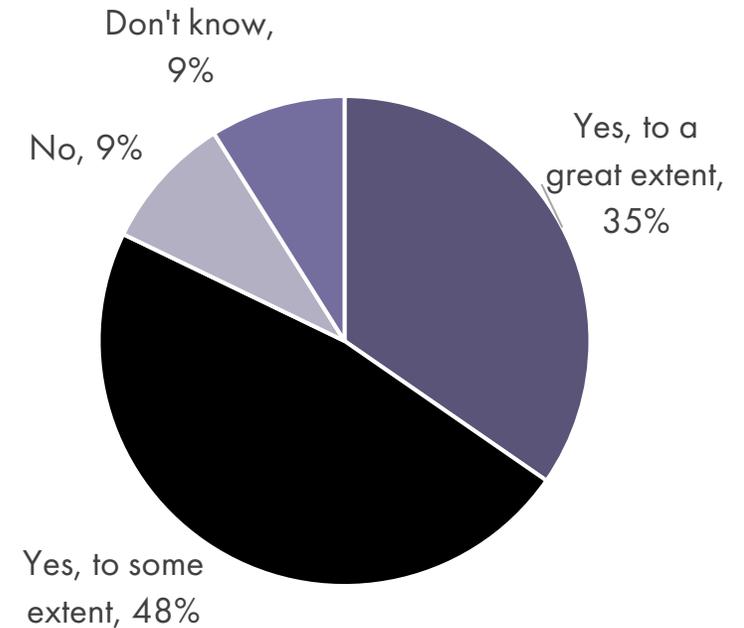
Over half of Australian agencies (54%) have at least some strategic focus on reducing carbon emissions in programmatic investment, much lower than European agencies at 83%. Sustainability is not seen as a barrier to investment in pDOOH.

strategic focus for reducing carbon emissions in programmatic investment

amongst Australian agencies involved with programmatic DOOH



amongst European agencies involved with programmatic buying*



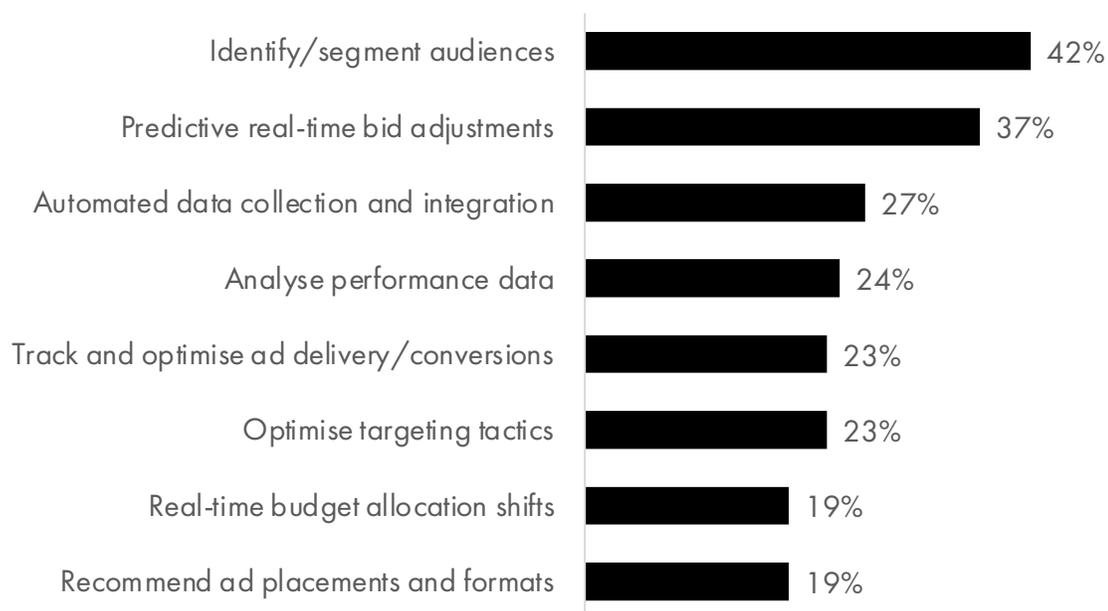
Source: IAB Australia Attitudes to Programmatic Digital Out of Home Report 2025 n=116 decision makers in ad agencies
Q - Is reducing carbon emissions in your programmatic investment a strategic focus for your organisation?

*IAB Europe's Attitudes to Programmatic Advertising Report 2024

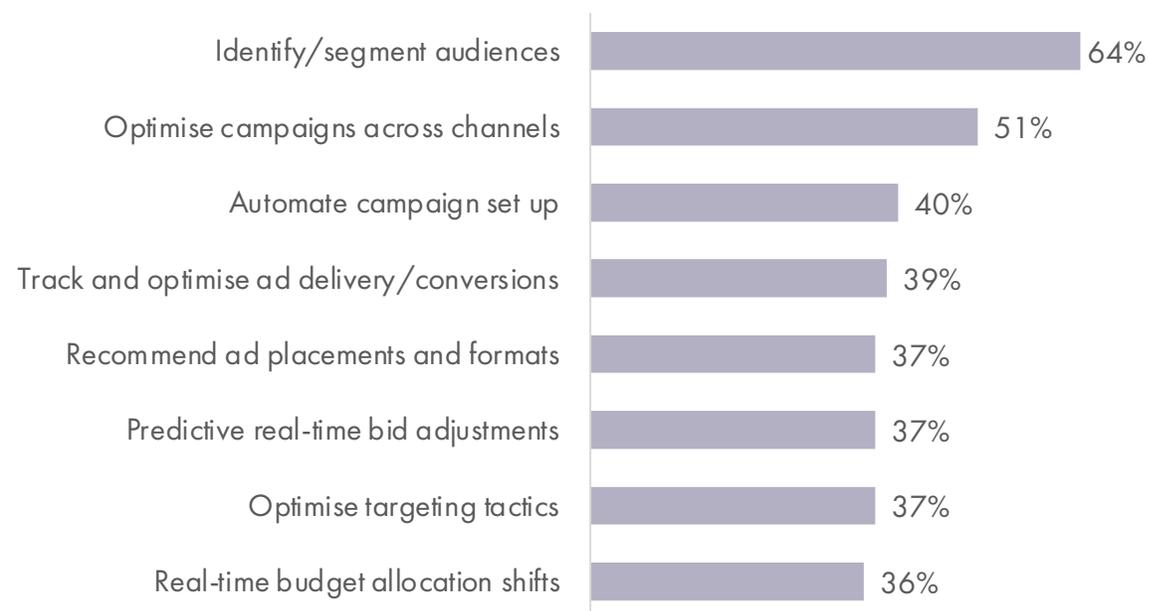
AI use cases exploring for deployment in digital out of home

The most common AI use case being explored across the industry is to identify or segment audiences. There is slightly lower exploration amongst agencies of AI use cases for the digital out of home campaign lifecycle, compared to what the IAB found in the recent Data State of the Nation industry survey for use cases in the broader media campaign lifecycle.

AI use cases exploring for deployment in digital out of home campaign lifecycle



AI use cases exploring for deployment in the media campaign lifecycle



Source: IAB Australia Attitudes to Programmatic Digital Out of Home Report 2025 n=116 decision makers in ad agencies. Q - Which of the following AI use cases are you exploring for deployment, or have deployed in the digital out-of-home campaign lifecycle?

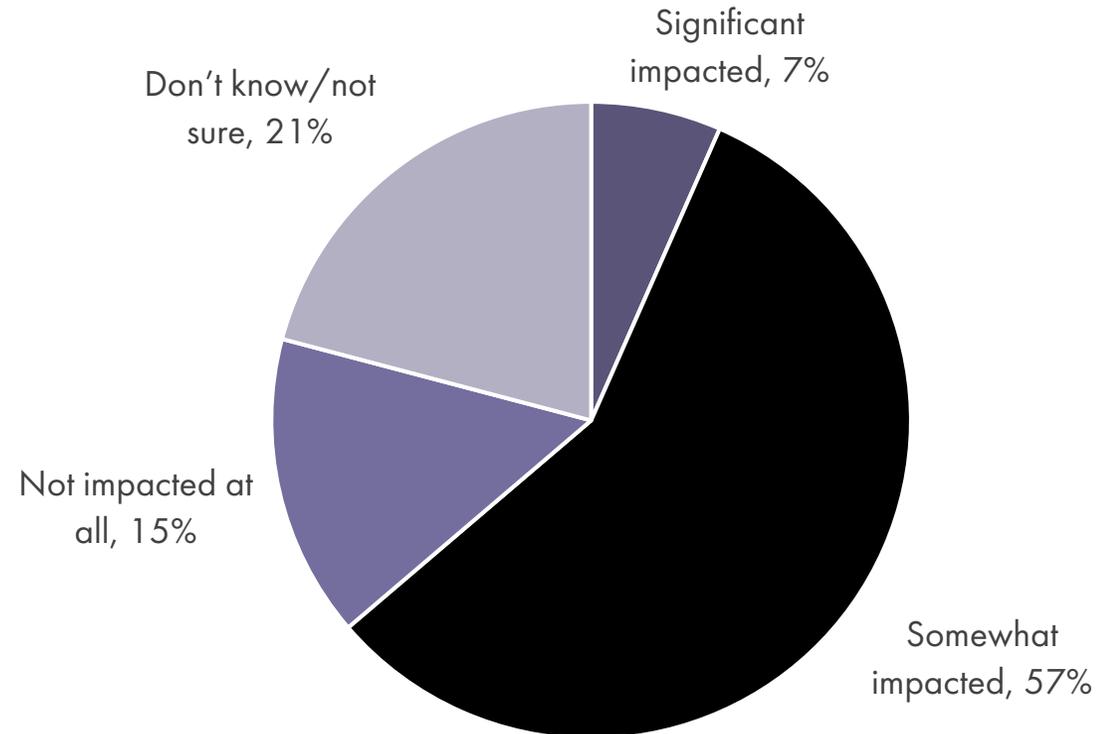
* IAB Australia Data State of the Nation Survey July 2025 n=103 advertising decision makers/influencers Q - Which of the following AI use cases are you exploring for deployment, or have deployed in the media campaign lifecycle?

expected impact of future Australian privacy legislation reforms on DOOH

Nearly two-thirds (64%) of agencies think digital out of home advertising opportunities will be impacted by future Australian privacy legislation reforms, while a further 21% are not sure.

The recent IAB Australia State of Data industry survey* found there is low to mid level understanding of Tranche 1 Australian Privacy Act Reforms (that include Children's Online Privacy Code, transparency for automated decision-making, cross-border data transfers, tort for serious invasions of privacy), amongst digital advertising decision makers/influencers.

expected impact of future Australian privacy legislation reforms on digital out of home advertising opportunities



Source: IAB Australia Attitudes to Programmatic Digital Out of Home Report 2025 n=116 decision makers in ad agencies
Q - How much do you think digital out-of-home advertising opportunities will be impacted by future Australian privacy legislation reforms?
* IAB Australia Data State of the Nation Survey July 2025 n=103 advertising decision makers/influencers buy and sell side

where can the industry support to provide further understanding of programmatic DOOH?

- Education resources in plain-language that explain the full pDOOH process and the roles of DSPs, SSPs, and other technology providers
- Australian-specific benchmarks and case study evidence demonstrating the impact of pDOOH on campaign outcomes
- Greater transparency around audience data sources, targeting methods, and measurement methodologies
- A clearer picture of how pDOOH is priced and the value it delivers
- Guidance on how to design and optimise effective pDOOH campaigns, supported by practical creative examples

"A simple guide explaining how different DSPs, platforms, and buying models operate—despite accessing the same inventory "

"A large-scale case study to compare the impacts and differences between a programmatic campaign and non-programmatic OOH. "

"More case studies showcasing different methods of campaign attribution in programmatic DOOH, showing how effectiveness is measured and results."

"Clearly articulate the trading process and use cases where there is a client cost or effectiveness benefit, as well as when there is not, to help marketers understand when and why they should trade this way."

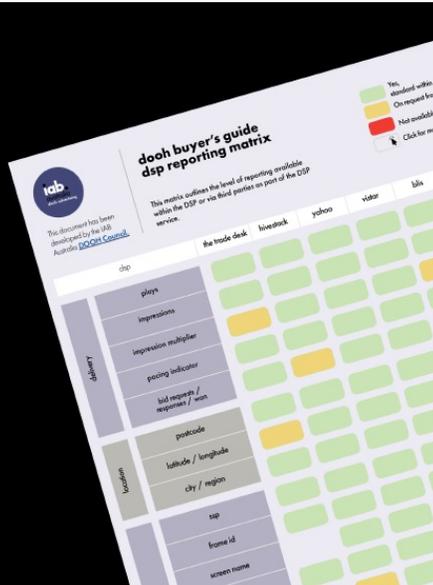
"The industry could provide clearer, standardised definitions of key metrics like "impressions" and "audience reach" within the context of programmatic DOOH. "

"More transparency around pricing models and data sources used for targeting would be helpful for understanding campaign effectiveness."

further resources

2025

dooh buyer's guide dsp reporting matrix



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Foundations of programmatic digital out of home (pDOOH)

Explore the fundamentals of Programmatic Digital Out-of-Home (pDOOH)! Learn about audience targeting; measurement, plus industry trends; case studies. A must-have course for those new to the digital out of home or the media industry.

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