

august 2026

programmatic digital out of home

state of the nation report

iab.
australia

thanks to our dooh advertising council



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contents

	Page
Methodology	4
Executive summary	5
Experience and investment in out of home advertising	6
Advertiser categories and drivers of programmatic DOOH	10
Planning and buying programmatic DOOH	11
Creative and targeting	16
Campaign objectives	18
Measurement and metrics	20
Barriers to further growth in programmatic DOOH	25
Industry support for improved planning, buying and assessing programmatic DOOH	26
AI use cases for digital out of home	28
Impact of privacy law reforms	29
Further resources	30

methodology

- The *Programmatic Digital Out-of-Home Advertising State of the Nation* industry survey was carried out in July 2026.
- 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 Australia DOOH Council with prioritisation for the development of industry standards, resources and education.
- The survey collected responses from 163 advertising decision makers from ad agencies involved with out of home advertising.
- A similar survey has previously been conducted in August 2025, March 2024, May 2021 and July 2022 and these reports (published as *Attitudes to Programmatic Digital Out-of-Home Report*) are available on the IAB Australia website.

executive summary

Adoption and planning

- Programmatic Digital Out-of-Home (pDOOH) Advertising has matured further this year, with a 10% pt increase in agencies have it as significant part of their activity (27% of agencies surveyed, compared to 47% who have DOOH advertising via IO/direct buying as a significant part of their activity).
- Three-quarters of agencies surveyed expect to increase investment in pDOOH in the next 12 months, while 57% intend to increase investment in digital out-of-home bought via IO/direct.
- Retail and FMCG are the advertiser categories for which most agencies have planned or bought programmatic digital out-of-home campaigns in the past 12 months.
- pDOOH is now firmly embedded in holistic planning, with 8 in 10 agencies considering it as part of overall cross-channel media planning. Integration with buying other forms of digital media is high, particularly with digital video and social media.
- Operational models are diversifying, with a shift from purely in-house trading toward hybrid models.

Purchase drivers

- Nearly all drivers for consideration of pDOOH have increased year on year. Geo-location targeting, data and targeting, and flexible buying options remain the key purchase drivers, with contextual relevance of environments rising sharply this year.

Creative and targeting

- DSP supplied data remains the most used data source for targeting and creative, while Move remains the most used data source when planning DOOH campaigns.
- Established formats continue to dominate creative usage. While creative and contextual optimisation dipped this year, intent to adopt these capabilities remains strong.

Objectives

- Brand awareness continues as the predominant objective for pDOOH campaigns, in contrast with retail media's lower-funnel focus, though usage for lower-funnel objectives lifted slightly in 2026.

Measurement

- Campaign audience reporting, digital brand lift surveys followed by MMM are considered the most important tools for assessing DOOH effectiveness. Ad delivery metrics (impression, reach and frequency) are most frequently used, though calls remain for standardised, cross-vendor measurement. The context of location also remains an important metric with some buyers questioning the quality of sites available in a programmatic buy.

Barriers inhibiting growth

- Demonstrating return on investment is now clearly the top barrier to pDOOH increasing its share of ad spend, followed by audience measurement and understanding of the cost versus benefit. Calls for standardised measurement, pricing and inventory transparency, and industry education are strong.

Strategic trends

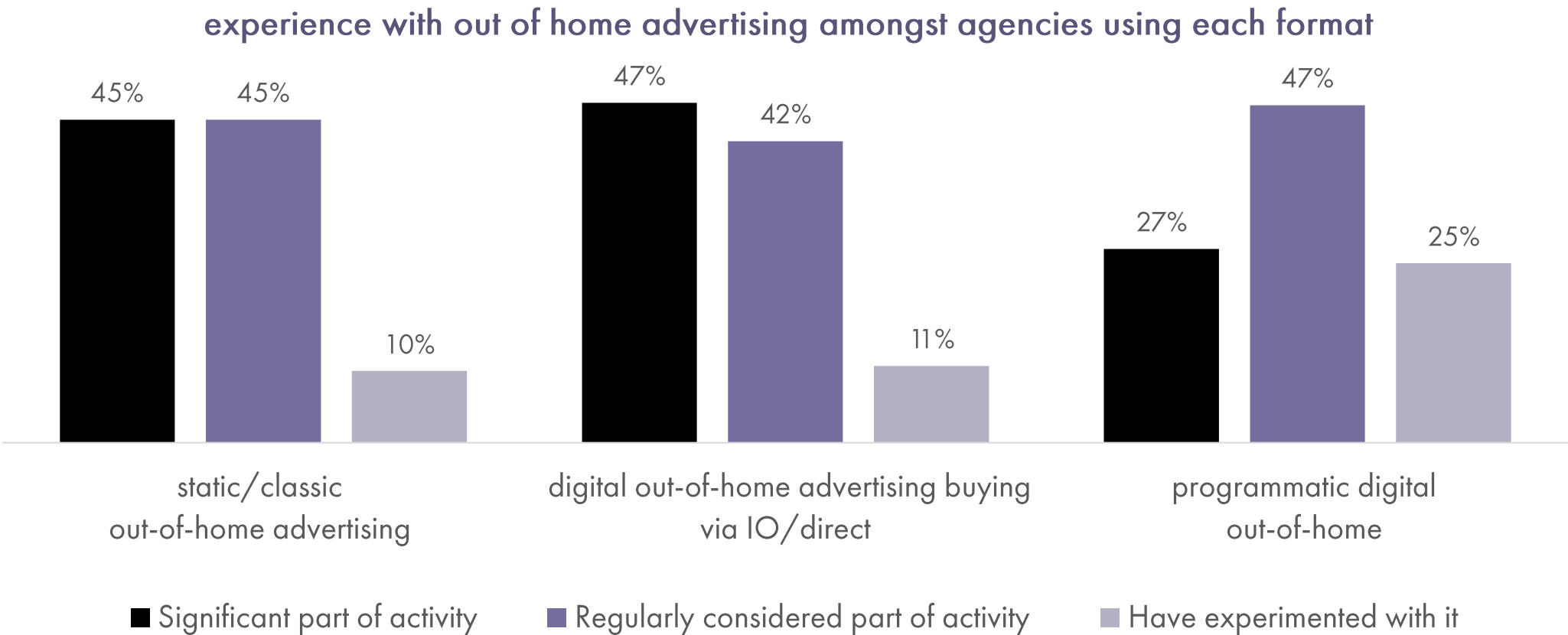
- AI exploration in DOOH continues to be led by audience segmentation.
- Uncertainty about the impact of Australian privacy reforms on DOOH has grown.

Outlook

- Agencies have become more experienced and largely settled what pDOOH is. The focus now is on proving its return, demonstrating the value of technology and understanding how it works alongside other digital inventory. Stronger ROI evidence, standardised metrics and greater transparency will be key to unlocking further growth.

experience with out of home advertising amongst users

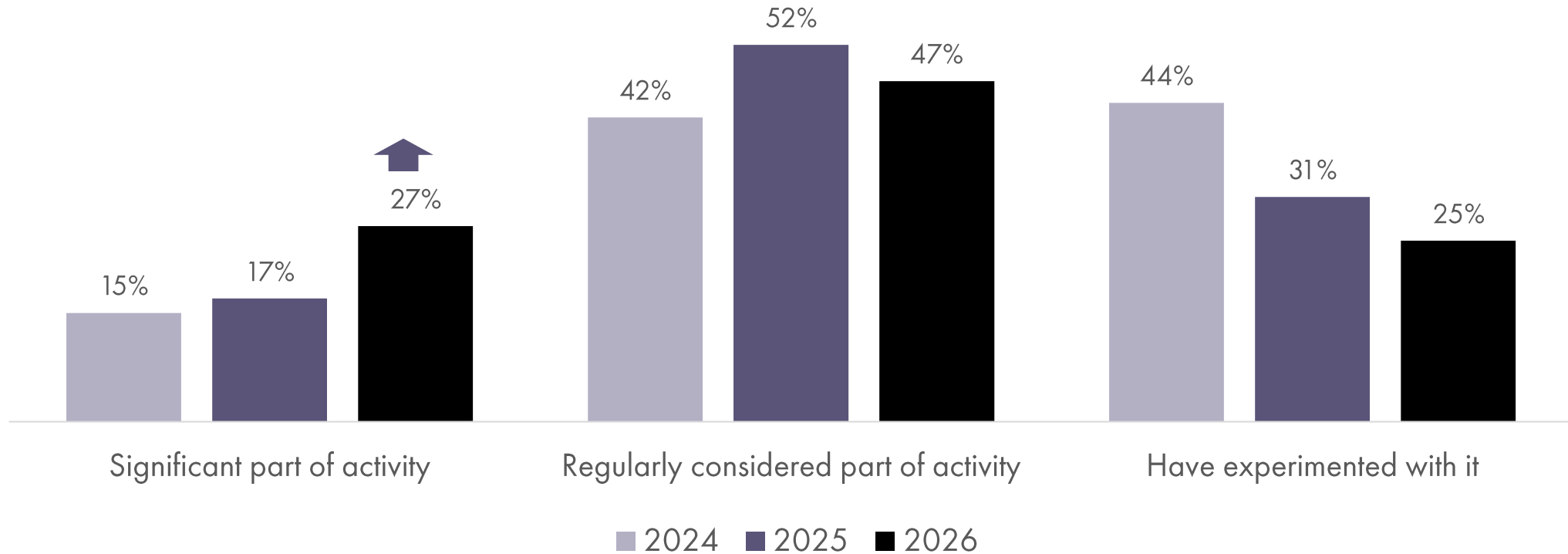
Amongst agency respondents using digital out of home advertising buying via IO/direct, 89% have it as a significant or regularly considered part of their activity. Amongst those using programmatic digital out-of-home, 74% have it as a significant or regularly considered part of their activity.



Source: IAB Australia Programmatic Digital Out of Home State of the Nation Report 2026 n=163 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 amongst users of programmatic DOOH advertising, from regular consideration to a higher proportion having it as a significant part of their activity

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

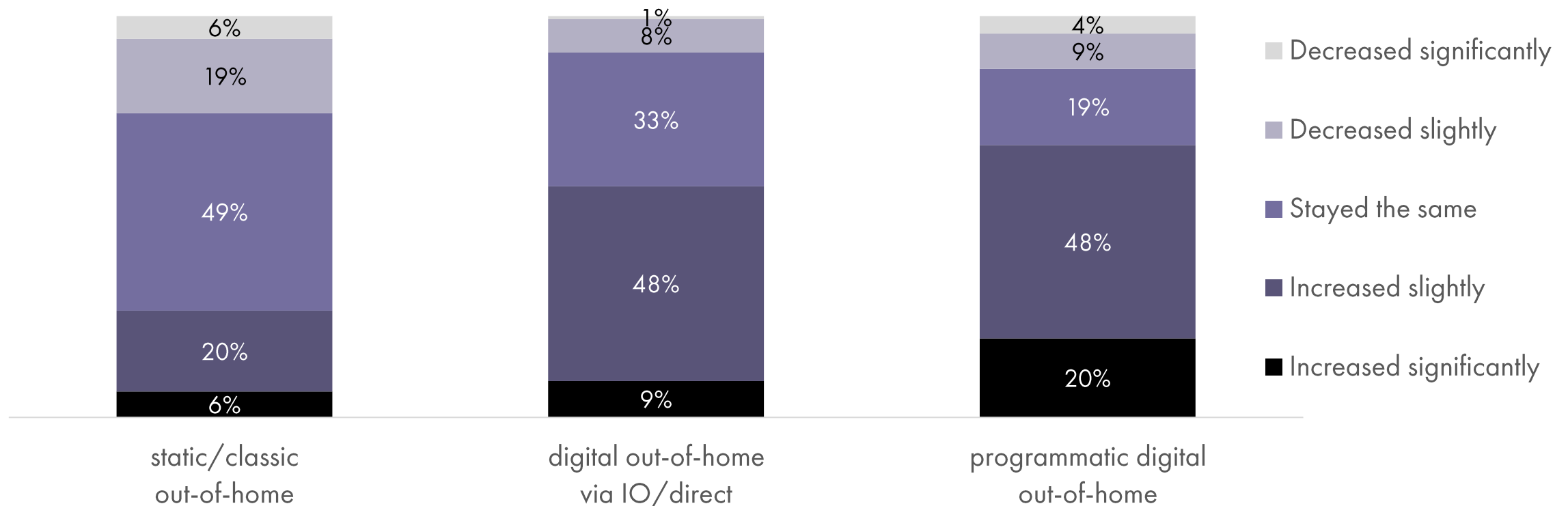


Source: IAB Australia Programmatic Digital Out of Home State of the Nation Report 2026 n=163 decision makers in ad agencies
Q - Which of these best describes your organisation's experience with <programmatic digital out-of-home> advertising to date?

a significant proportion of agencies surveyed have slightly increased programmatic DOOH investment over the past year

Amongst agencies using each channel, 68% have increased their investment in programmatic digital out-of-home over the past 12 months, compared to 57% for digital out-of-home bought via IO/direct and 26% for static/classic out-of-home.

change in advertising investment across out of home channels over the past 12 months

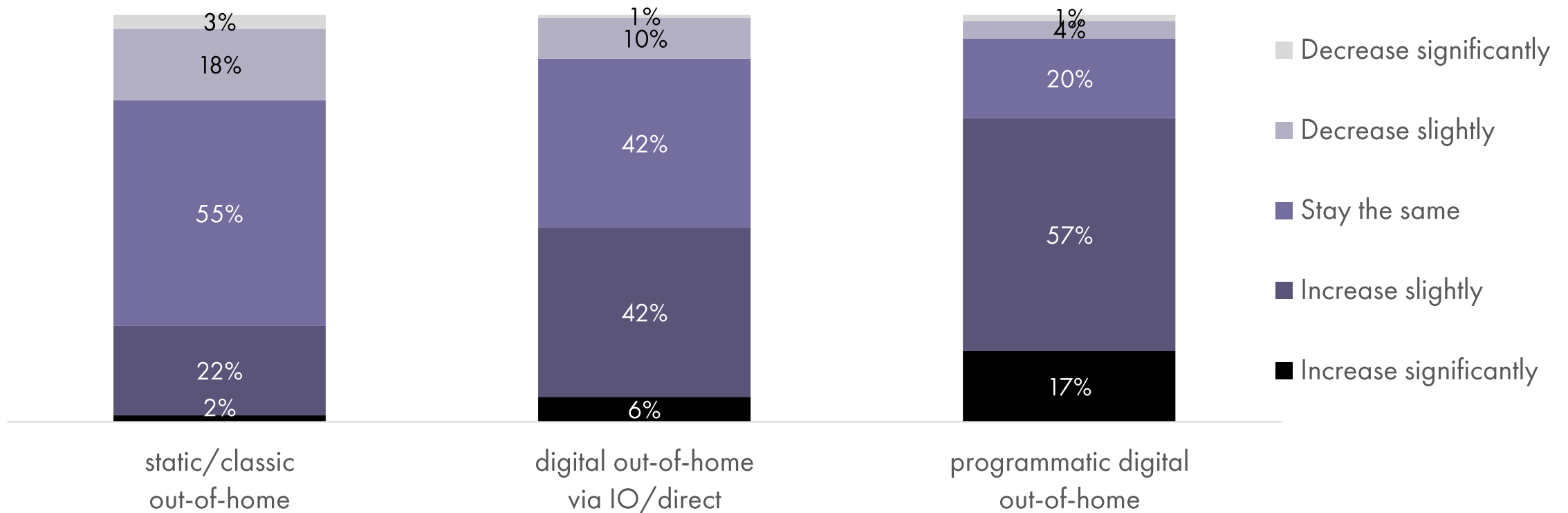


Source: IAB Australia Programmatic Digital Out of Home State of the Nation Report 2026 n=163 decision makers in ad agencies
Q - Over the past 12 months, how has your/your clients advertising investment changed across these channels? (amongst those using each channel)

3 in 4 agencies surveyed expect programmatic DOOH investment to increase in the next 12 months

74% of agencies using programmatic digital out-of-home expect their investment to increase over the next 12 months, well ahead of digital out-of-home bought via IO/direct (48%) and static/classic out-of-home (24%).

expected change in advertising investment across out of home channels over the next 12 months



Source: IAB Australia Programmatic Digital Out of Home State of the Nation Report 2026 n=163 decision makers in ad agencies

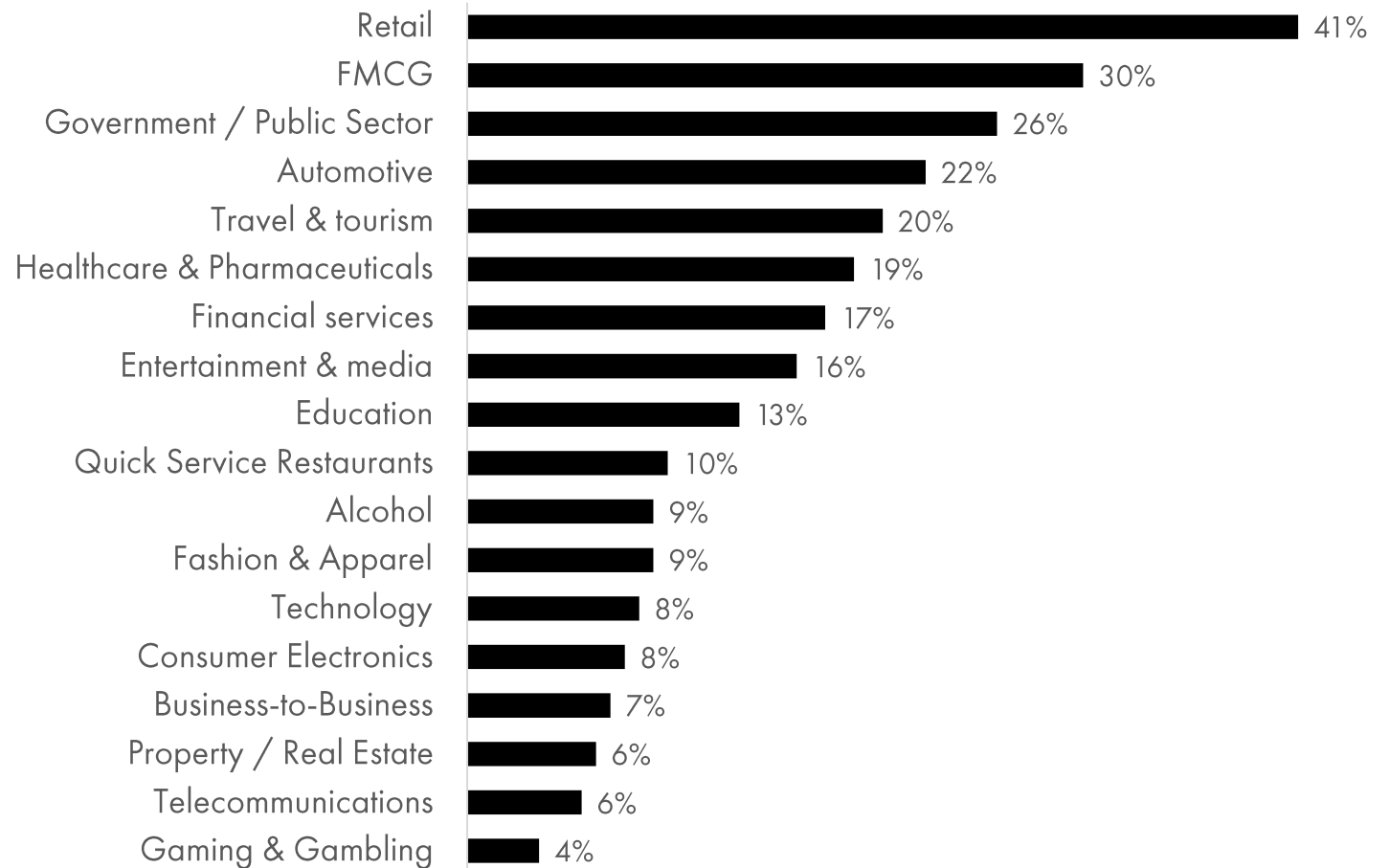
Q - Over the next 12 months, how do you expect your/your clients advertising investment across these channels to change? (amongst those using each channel)

retail, FMCG and government the top categories using programmatic DOOH

Retail is the advertiser category for which most agencies have planned or bought programmatic digital out-of-home campaigns in the past 12 months, followed by FMCG and government/public sector.

Categories span both brand- and performance-focused advertisers, reflecting the broadening use of the channel.

advertiser categories planned or bought programmatic DOOH in the past 12 months



Source: IAB Australia Programmatic Digital Out of Home State of the Nation Report 2026 n=163 decision makers in ad agencies

Q - For which of the following advertiser categories have you/your agency planned or bought programmatic digital out-of-home (pDOOH) campaigns in the past 12 months? (Please select all that apply)

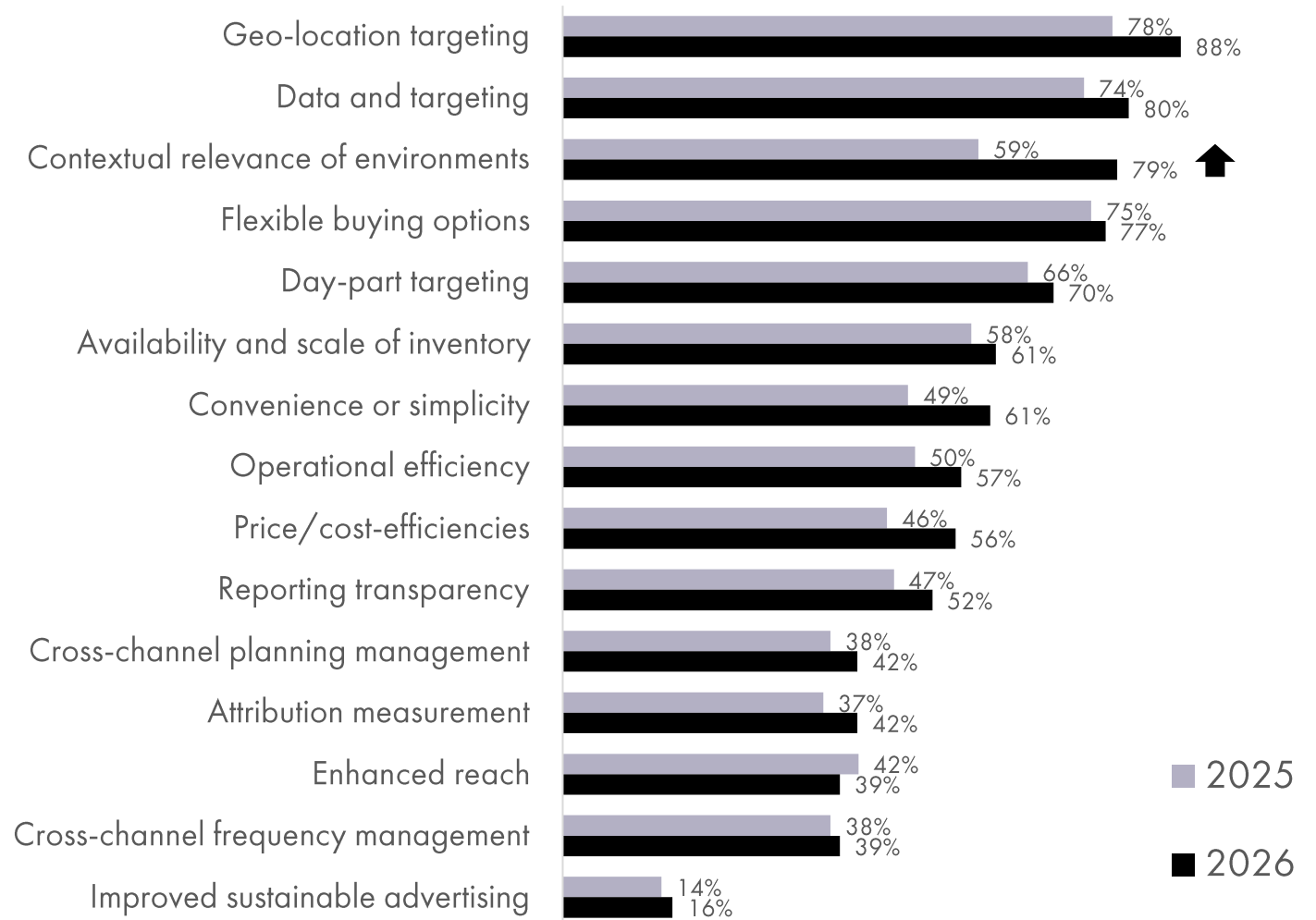
targeting capabilities and flexibility are major drivers of programmatic digital out of home advertising

Geo-location targeting remains the #1 factor for buying digital out-of-home programmatically, with data and targeting and flexible buying options continuing as top drivers.

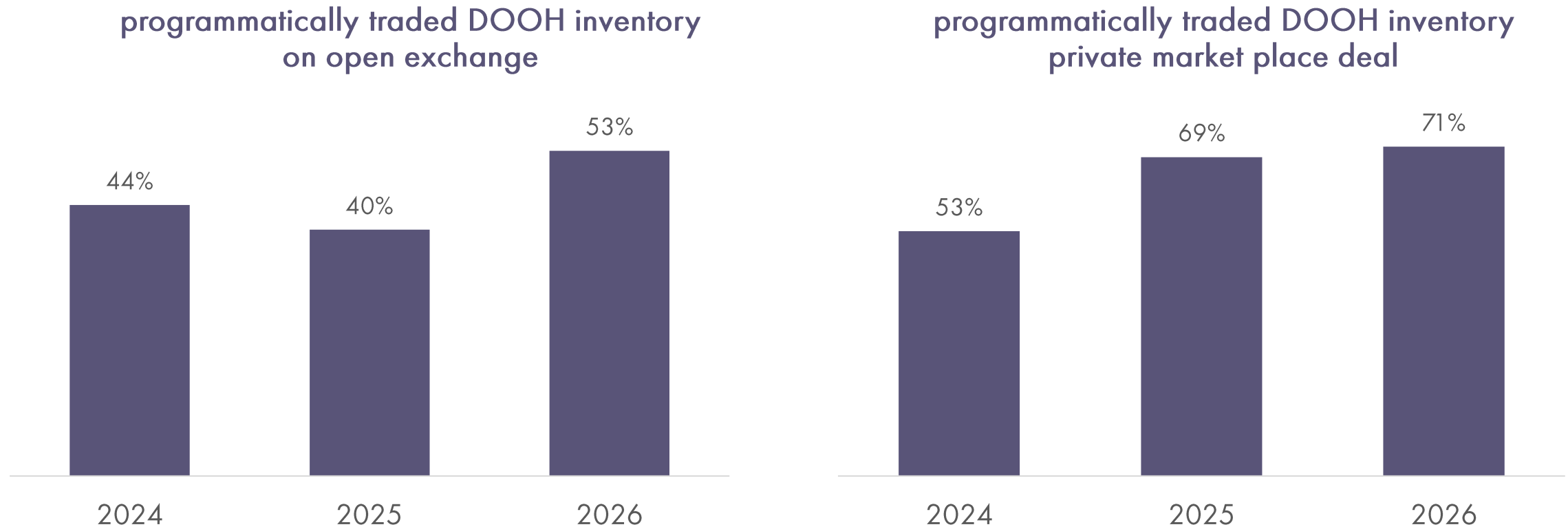
Nearly all factors listed have increased year on year as considerations for buying DOOH programmatically. The contextual relevance of environments has seen the biggest rise year on year, up 20% pts, with convenience and price/cost-efficiencies also increasing.

“The industry should stop measuring screens and start measuring moments. The future of programmatic DOOH lies in understanding context and attention not just impressions.” – agency respondent

major factors for buying programmatic DOOH advertising



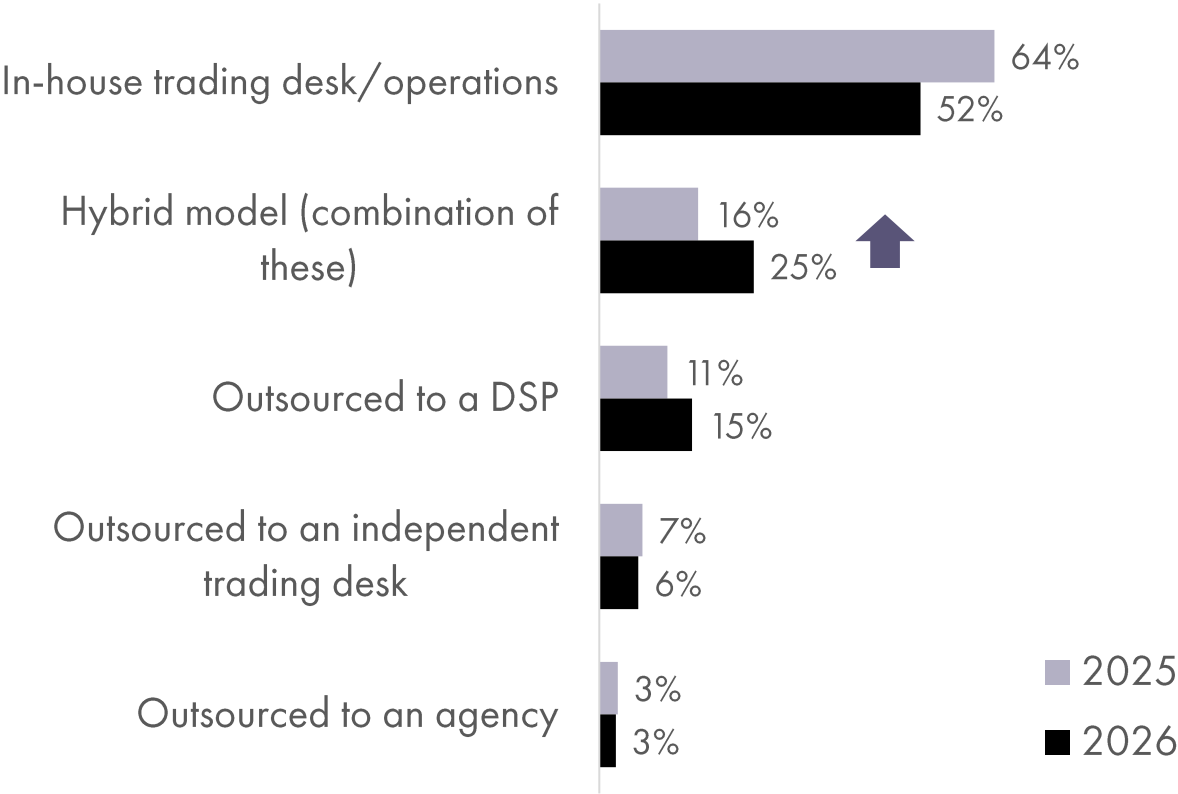
the increase in usage of programmatic buying for digital out of home is led by open exchanges



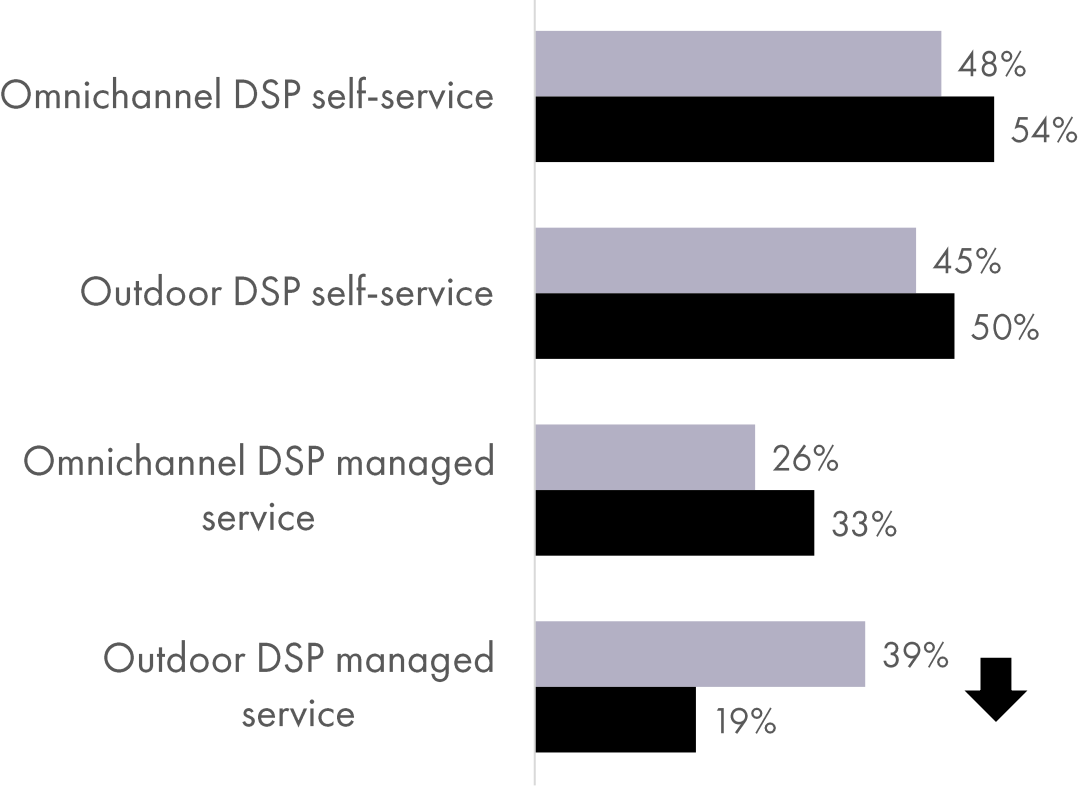
Source: IAB Australia Programmatic Digital Out of Home State of the Nation Report 2026 n=163 decision makers in ad agencies
Q - Which of the following programmatic advertising buying methods have you used for digital out-of-home? (Select all that apply)

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 Programmatic Digital Out of Home State of the Nation Report 2026 n=163 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 consider pDOOH as part of overall cross-channel media planning

Programmatic DOOH is now firmly embedded in agency planning, with 82% of agencies considering pDOOH as part of overall cross-channel media planning and 73% planning it alongside static/classic OOH and digital OOH activity.

"PDOOH is often planned in silo to traditional static and digital OOH due to differences in measurement (traditional in MOVE, PDOOH via DSP) it would be helpful to measure these two types of OOH campaigns together to understand their holistic impact." – agency respondent

approach to programmatic DOOH planning and buying



Source: IAB Australia Programmatic Digital Out of Home State of the Nation Report 2026 n=163 decision makers in ad agencies

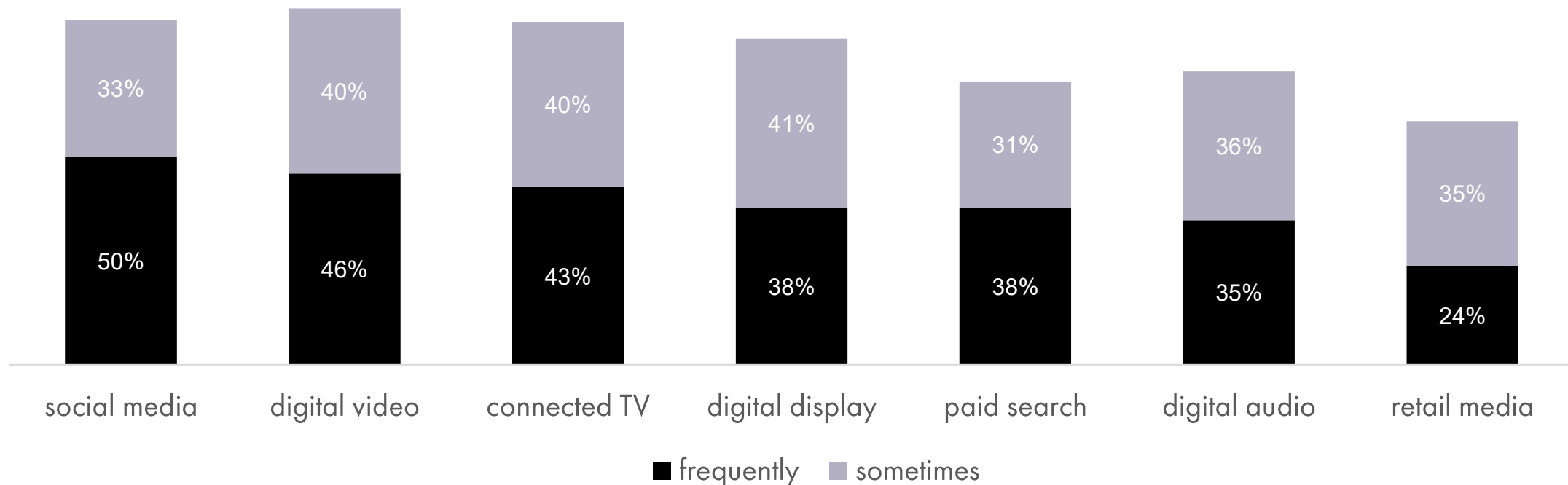
Q - Thinking about your organisation's approach to programmatic DOOH (pDOOH), which of the following best describes how it is currently considered within media planning? (% selecting yes)

programmatic DOOH is most often bought in omnichannel buys with digital video and social media

86% of agency respondents frequently or sometimes include programmatic DOOH in the same media plan or campaign as digital video, and 83% with social media. Inclusion with retail media is least common, though it still occurs at least sometimes for over 6 in 10.

When running omnichannel campaigns programmatically (e.g. including display, video, audio, CTV etc), 74% of agencies at least sometimes adapt the creative to suit the relevant DOOH viewing environment, similar to last year (76%).

how often programmatic DOOH is included in the same media plan or campaign as other channels



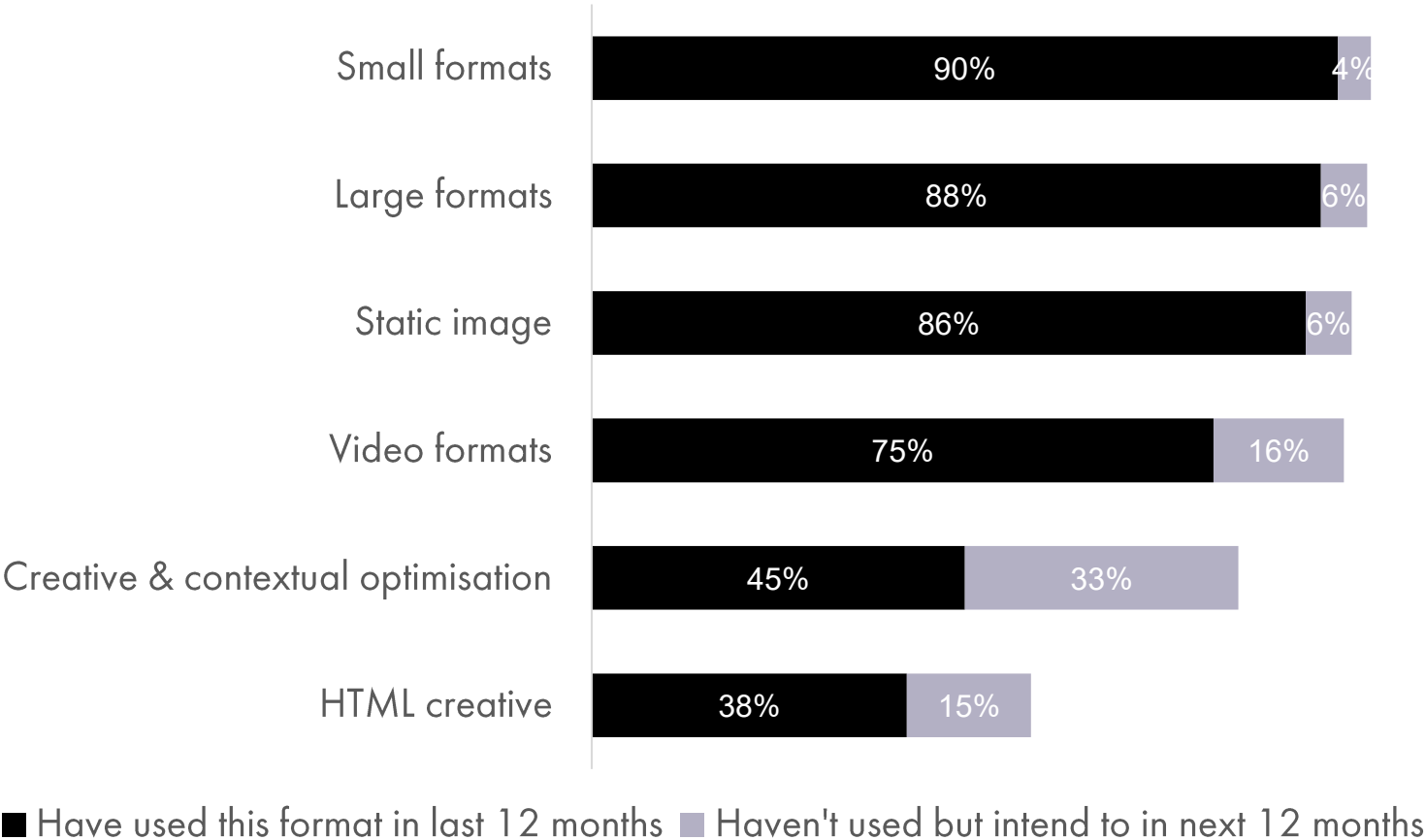
intent to adopt creative optimisation remains the strongest of any format

Small, large and static image formats remain near-universal amongst agencies using digital out of home advertising.

Usage of creative and contextual optimisation dipped this year to 45% (from 52% in 2025), however a further 33% who haven't yet used it intend to in the next 12 months – the strongest adoption intent of any format.

“The industry needs more uniformity in specs – or an easy to execute system that can resize creative to fit greater volume of site specifications, rather than clients needing to provide multiple assets with different specs.”
– agency respondent

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

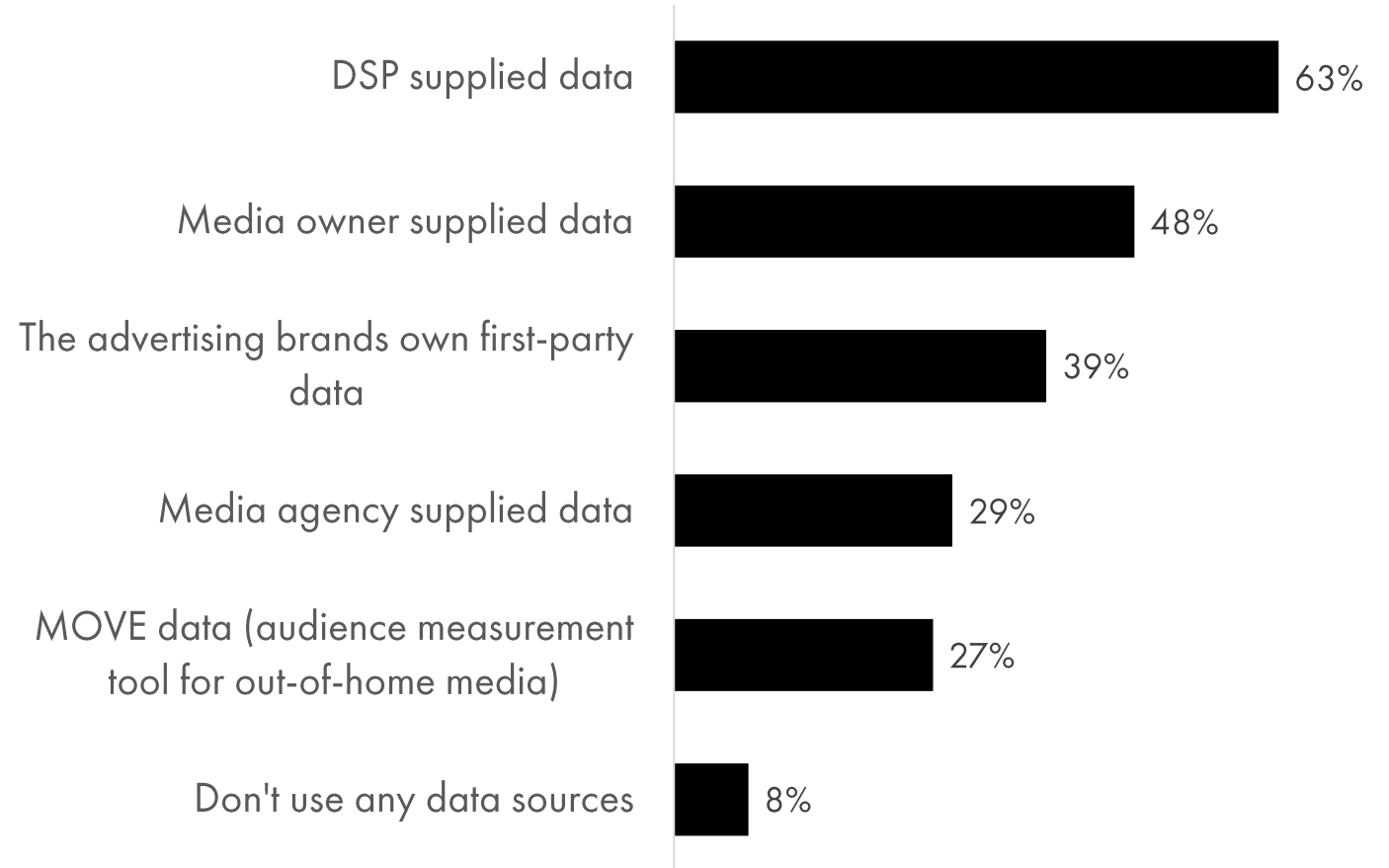


DSP supplied data remains the most used source for targeting and creative

DSP supplied data remains the most used source to inform targeting and creative for programmatic digital out of home advertising, used by 63% of agencies.

"Being able to incorporate PDOOH into MOVE and demonstrate incrementality would be amazing and increase investment undoubtedly" – agency respondent

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



Source: IAB Australia Programmatic Digital Out of Home State of the Nation Report 2026 n=163 decision makers in ad agencies

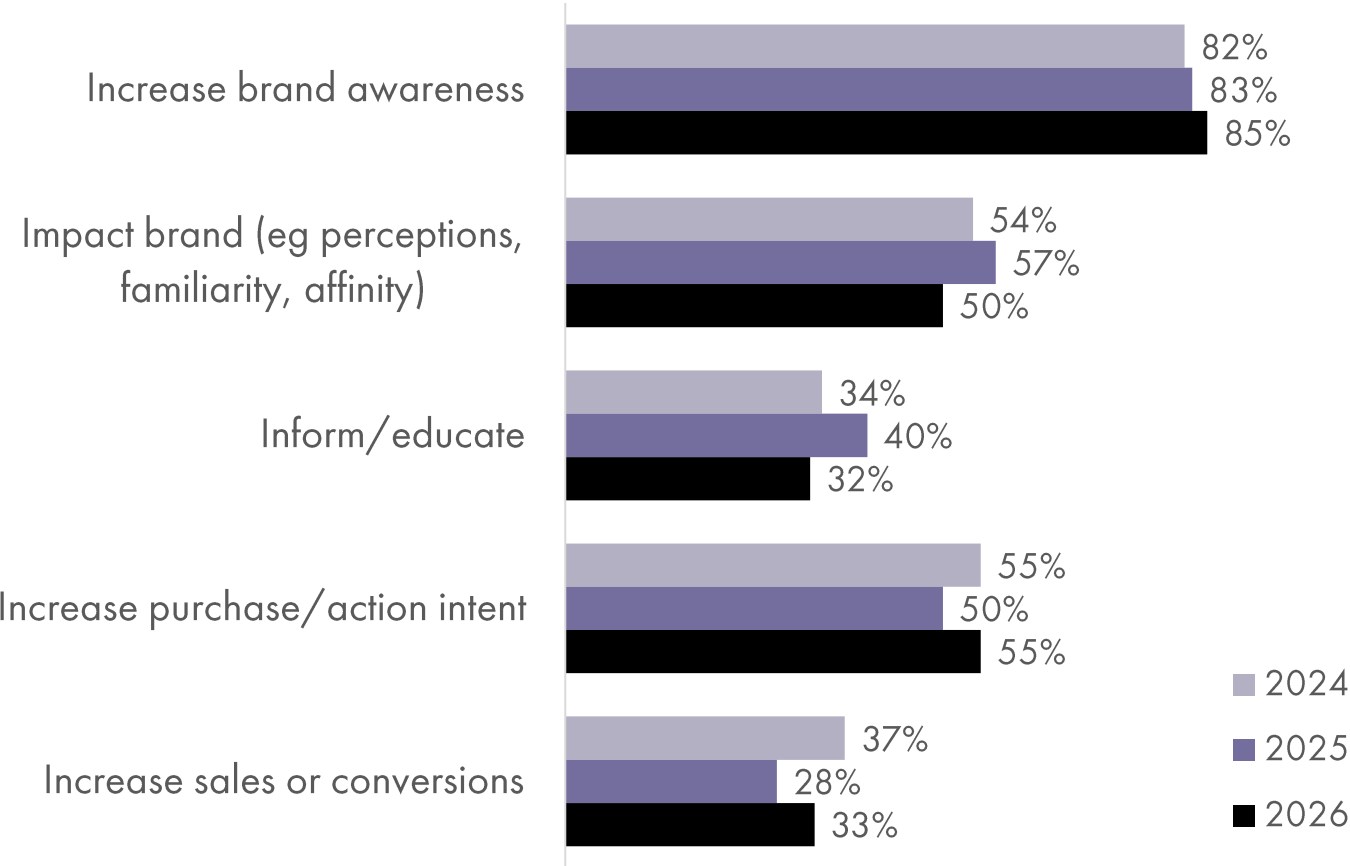
Q - Which of the following data sources is your company/client using to inform targeting and creative for programmatic digital out-of-home advertising (Select all that apply)

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.

There has been a slight lift in usage of programmatic digital out of home for lower funnel objectives in 2026 compared to lower levels amongst those surveyed in 2025.

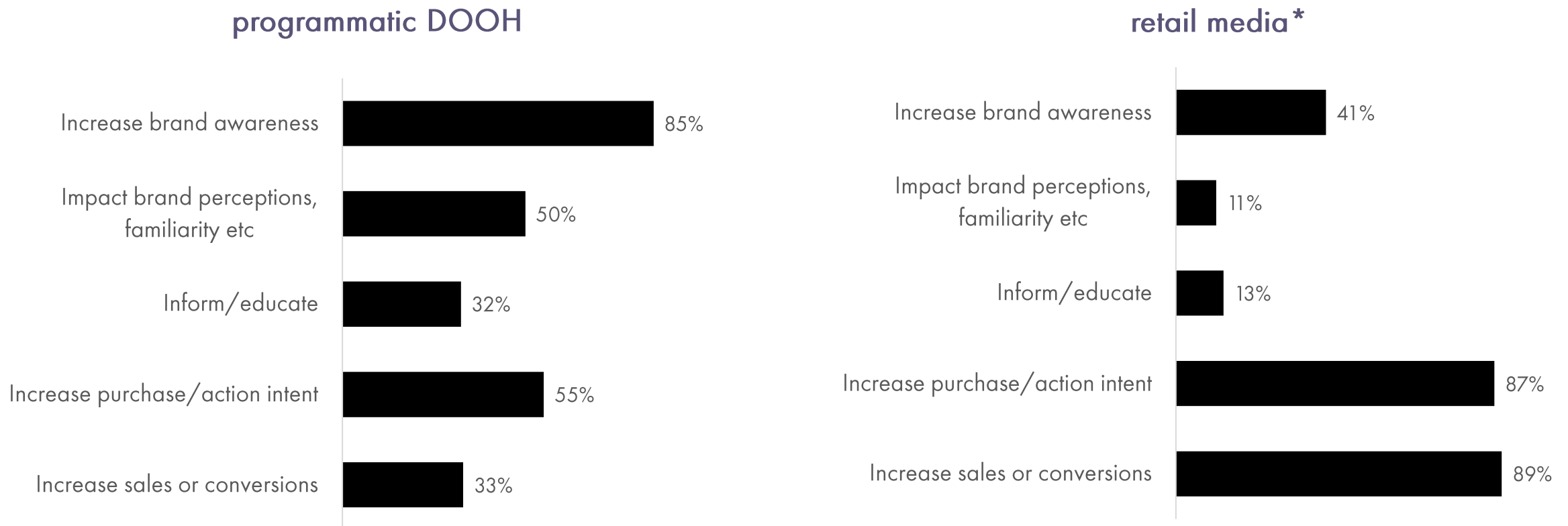
campaign objectives of
programmatic digital out of home advertising



Source: IAB Australia Programmatic Digital Out of Home State of the Nation Report 2026 n=163 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 compared to retail media advertising

Advertisers typically use digital out-of-home (DOOH) and retail media for very different points in the customer journey. DOOH generally uses audience, location, traffic, and contextual data. Advertisers know who is likely to see the ad, but not necessarily who buys afterward. Retail media uses first-party retailer data, including browsing, search, loyalty-card, and purchase information. Advertisers can directly connect advertising to sales outcomes. Because of this, retail media is often judged on conversion metrics, while DOOH is judged on reach, awareness, attention, and brand lift.



Source: IAB Australia Programmatic Digital Out of Home State of the Nation Report 2026 n=163 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)?

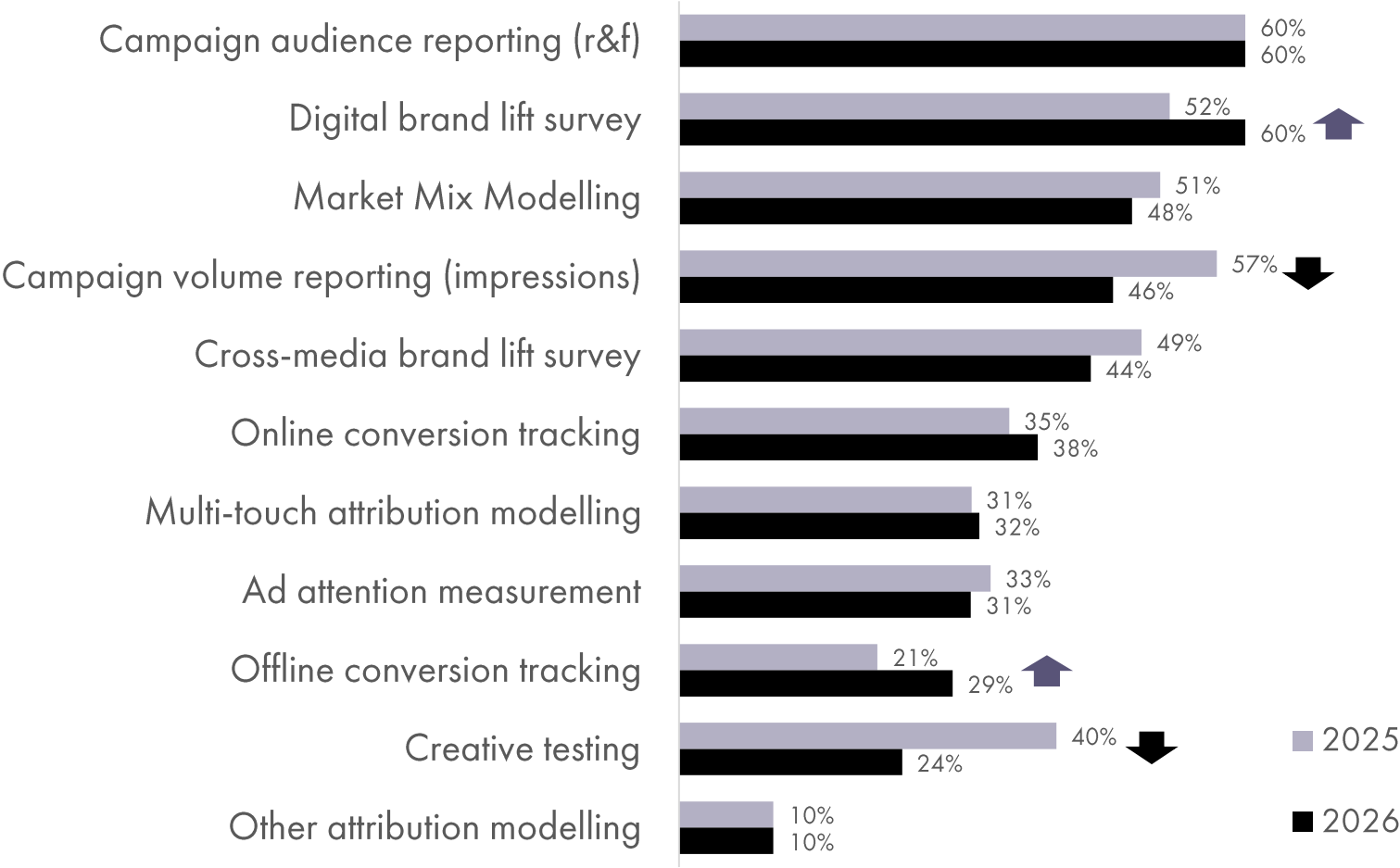
*Source; IAB Australia Retail Media State of the Nation 2026 n=60 retail or commerce media advertising decision makers and influencers from agencies and brands

campaign audience reporting and brand lift surveys the most important measurement tools

Campaign audience reporting (reach and frequency) and digital brand lift studies remain the most important tool amongst agencies for assessing the effectiveness of out of home advertising investments, with digital brand lift surveys rising to have equal importance with campaign audience reporting this year.

The importance of creative testing and campaign volume reporting has declined year on year.

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



Source: IAB Australia Programmatic Digital Out of Home State of the Nation Report 2026 n=163 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

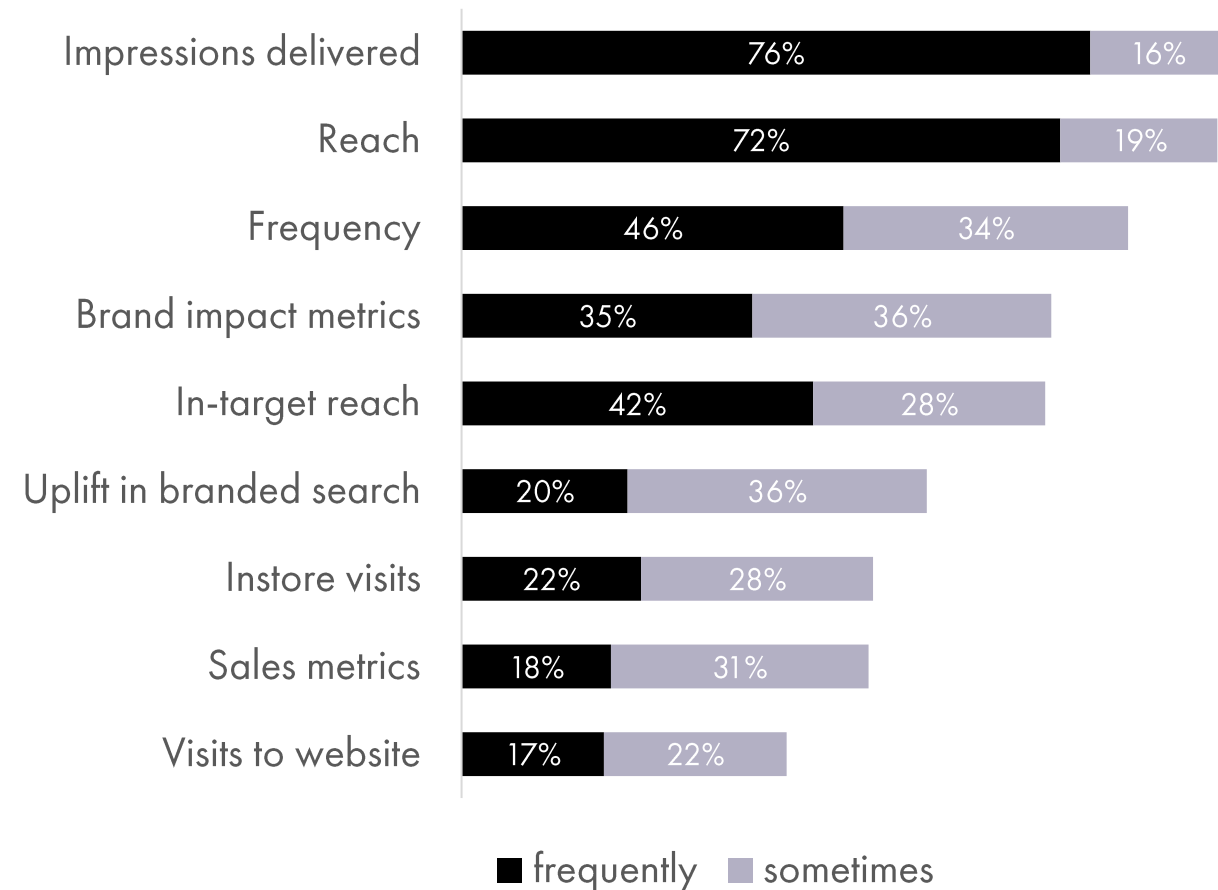
Ad delivery metrics (impressions and reach & frequency) are the most frequently used metrics amongst agencies to assess effectiveness of programmatic DOOH campaigns.

Increasing brand awareness remains the predominant objective for programmatic DOOH amongst agencies and 71% are at least sometimes using brand impact metrics to assess effectiveness.

“The industry should improve transparency and standardisation around reach and frequency modelling for PDOOH. Clients need clearer methodology, assumptions and validation behind PDOOH audience estimates.”

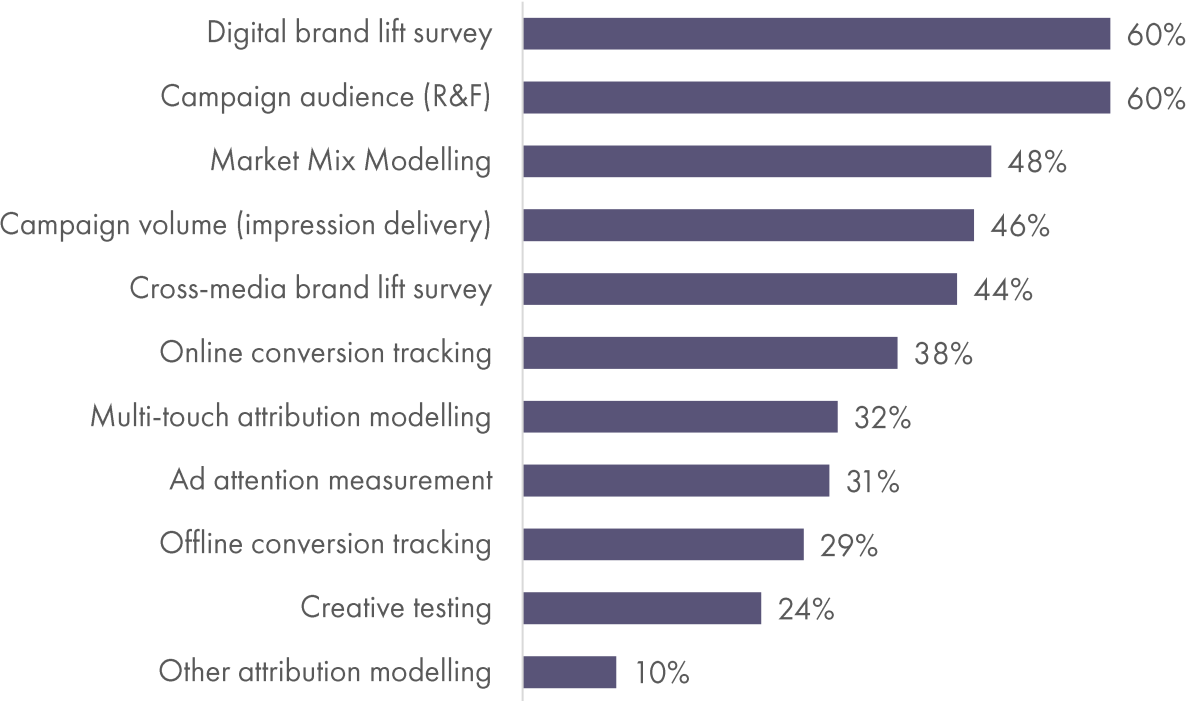
– agency respondent

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

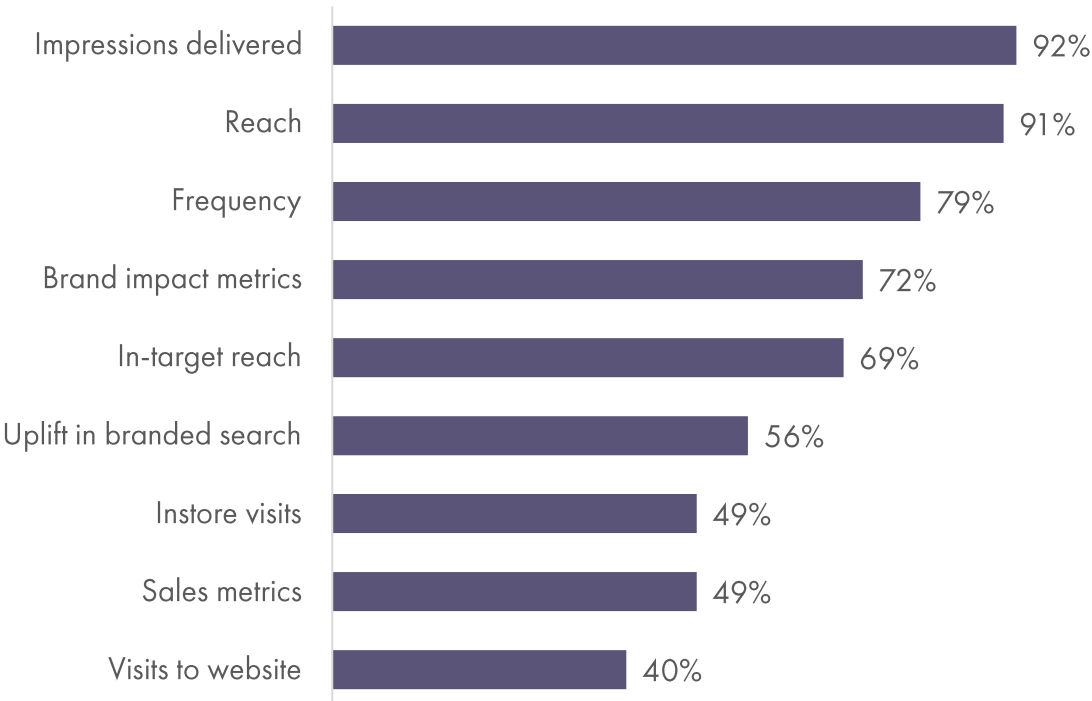


while delivery metrics are heavily used, digital brand lift and MMM are ranked as important tools for assessing effectiveness

important tools for assessing the effectiveness of pDOOH campaigns



metrics frequently or sometimes used to assess effectiveness of pDOOH campaigns



Source: IAB Australia Programmatic Digital Out of Home State of the Nation Report 2026 n=163 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)
Q - How often are you using the following metrics to assess effectiveness of your programmatic digital out-of-home campaigns?

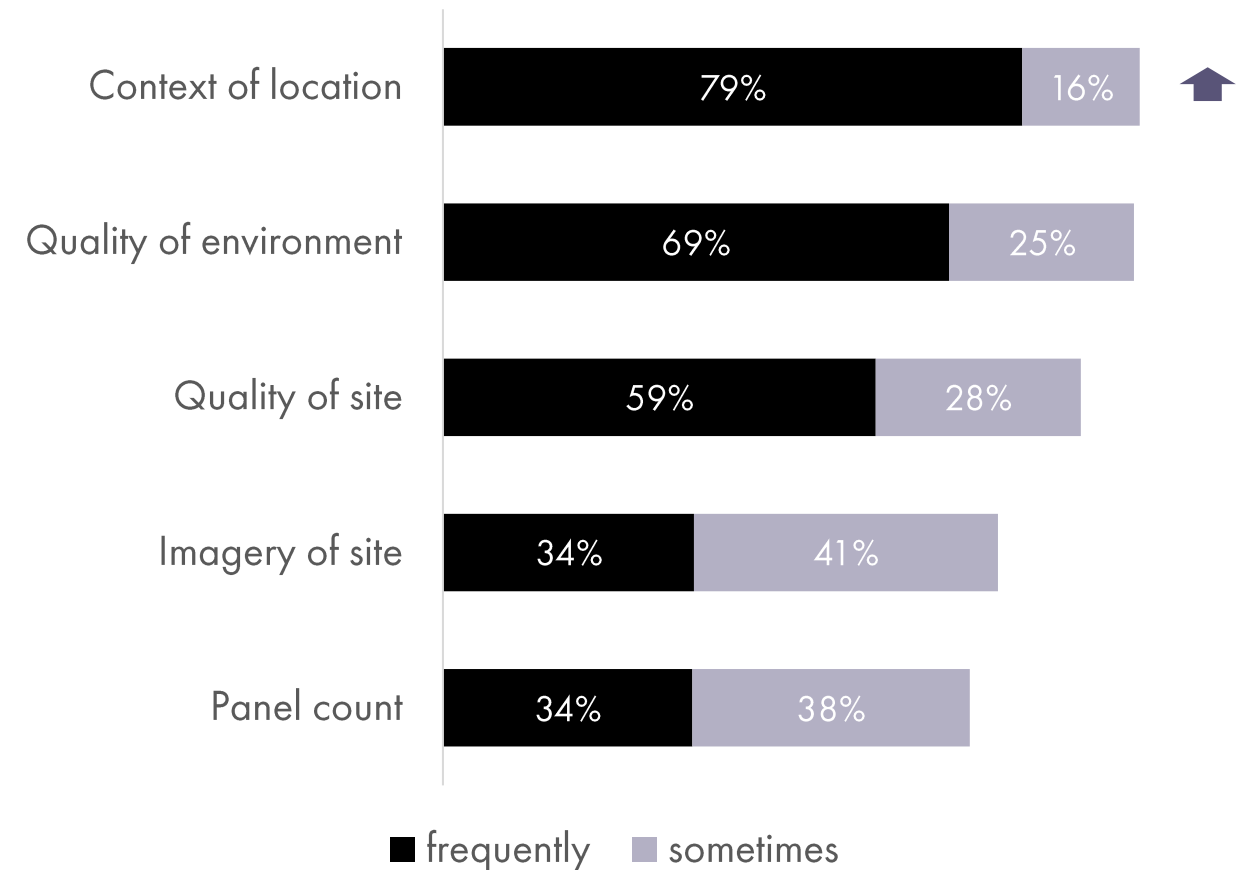
location and quality metrics considered when buying programmatic DOOH

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

While frequent usage of all other classic metrics have declined year on year, usage of context of location has increased (from 73% to 79% frequently using).

"There's still a big misconception about the quality of sites available in a programmatic buy. I think refreshed education on programmatic should be the focus and a renewed understanding that it's not 'leftovers'."
– agency respondent

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

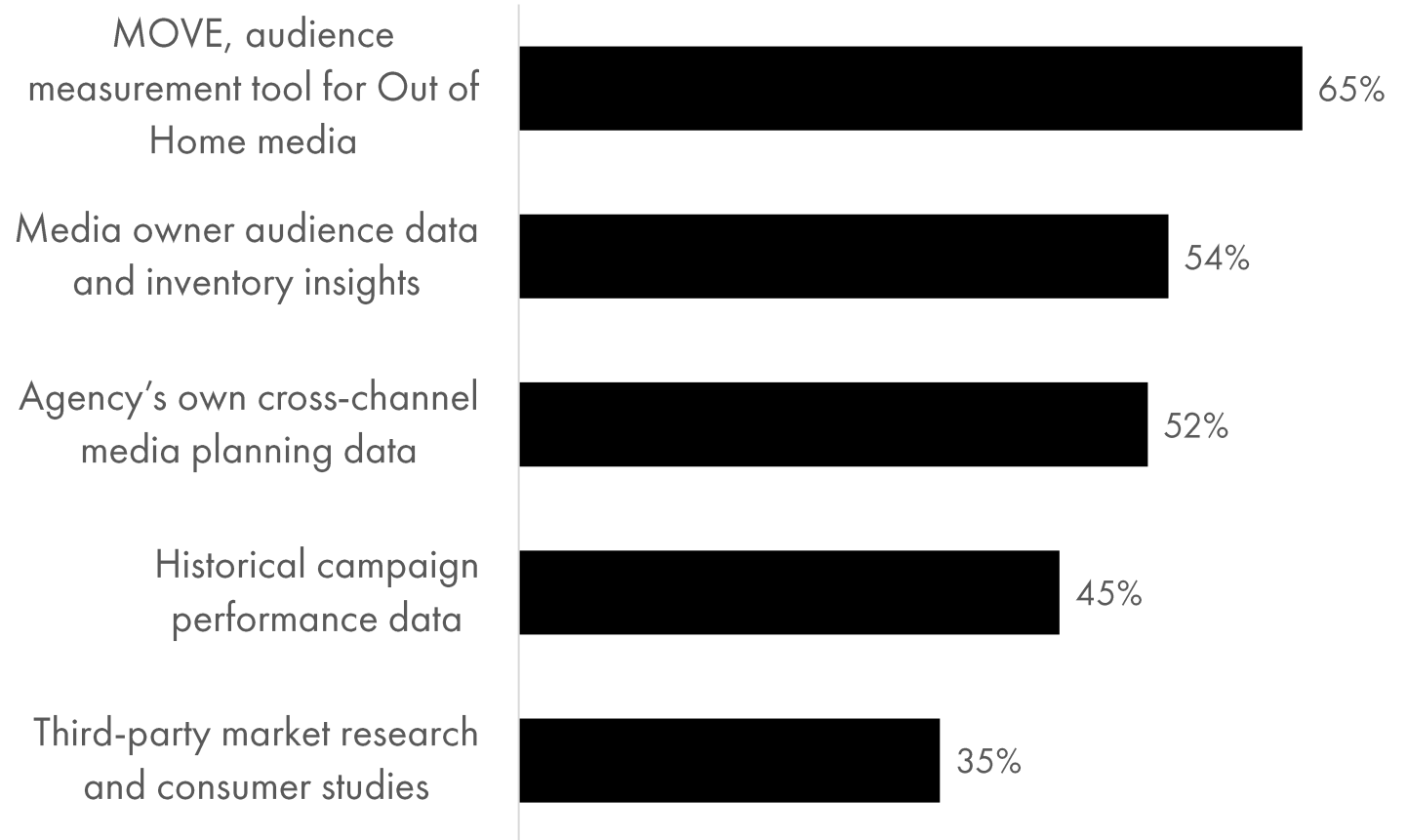


MOVE data is the most used source when planning DOOH campaigns

Two-thirds of agencies are using MOVE, the audience measurement tool for out of home media, when planning digital out of home advertising campaigns. Media owner audience data and agencies' own cross-channel media planning data are each used by over half.

"We should be able to import an indicative buy-plan to MOVE, combine it with our direct MOVE runs, and see the indicative impact on R&F. We should also be able to do the same with real buys post-campaign. Clients want the same buy metrics despite trading types."
– agency respondent

data sources used when planning digital out of home advertising campaigns



demonstrating ROI is the biggest barrier to pDOOH getting a larger share

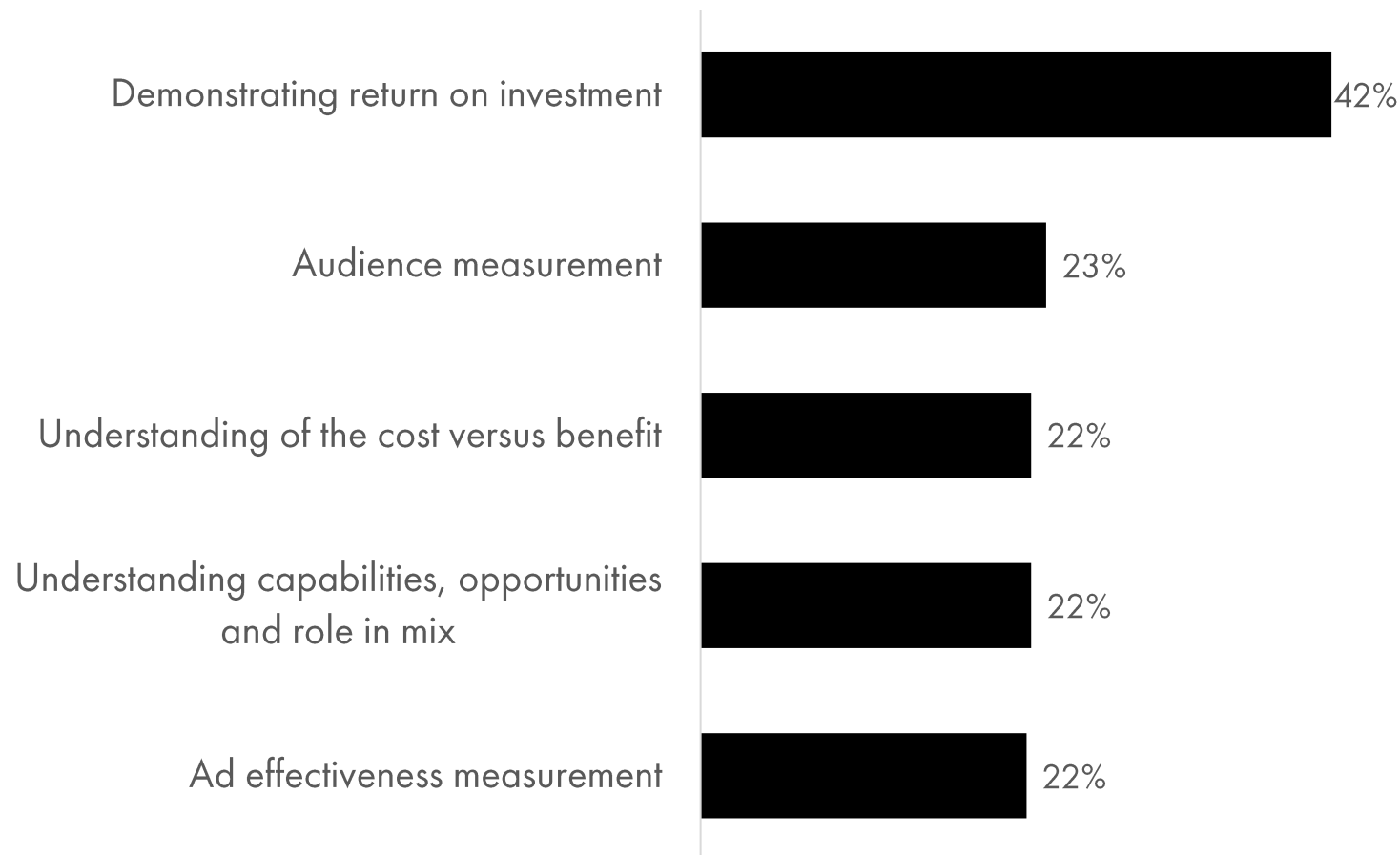
Demonstrating return on investment is now clearly the top barrier preventing programmatic digital out of home getting a larger share of ad volume, cited by 4 in 10 agencies.

Understanding of the cost versus benefit, effectiveness measurement and audience measurement round out the top barriers.

"The industry needs to standardise universal, real-time impression measurement across all networks. Unifying audience metrics and integrating privacy-first footfall attribution directly into omnichannel DSPs eliminates industry fragmentation, enabling pDOOH to be planned seamlessly, bought dynamically, and assessed with the exact ROI precision of digital channels." – agency respondent

"PDOOH is very expensive relative to direct IO or even managed IO. Realising the full value of pdooh is rare in most cases." – agency respondent

barriers preventing programmatic digital out of home getting a larger share of ad volume (top 3)



Source: IAB Australia Programmatic Digital Out of Home State of the Nation Report 2026 n=163 decision makers in ad agencies

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

How can the industry improve the planning, buying and assessing of programmatic digital out of home advertising?

- **Standardised measurement:** Consistent audience and reach & frequency metrics and methods, standardised impression measurement methodologies, consistent reporting frameworks and taxonomies.
- **Greater transparency across inventory quality, impression delivery and reporting:** including campaign pacing and spend delivery, supply path and non-working media costs, screen availability and win rates, proof of delivery and proof of posting.
- **Proof of business outcomes and ROI:** move beyond impressions and screen counts toward demonstrating business impact (including attribution, incremental sales and brand lift, footfall, attention and integration with traditional OOH and omnichannel measurement).
- **Education and industry-wide training:** understanding on why advertisers should buy OOH programmatically rather than directly.

"Standardise measurement and audience reporting across vendors and dsp's. Better transparency around impression delivery, attribution and inventory quality would make planning and optimisation much easier. Consistent metrics and stronger integration with omnichannel reporting would also give buyers greater confidence"

"Give buyers greater transparency into inventory quality before purchase. Richer contextual information, historical performance benchmarks, and clearer screen-level insights would improve planning confidence and help advertisers make smarter investment decisions."

"Stop measuring where ads appeared and start measuring why they mattered. A shared attention-and-outcomes framework would let programmatic DOOH compete on business impact, not screen counts, transforming planning from inventory buying into audience intelligence."

"PDOOH is often planned in silo to traditional static and digital OOH due to differences in measurement (traditional in MOVE, PDOOH via DSP) it would be helpful to measure these two types of OOH campaigns together to understand their holistic impact."

"The next step isn't more inventory, it's smarter automation. AI-powered planning that recommends locations, optimizes creative by context and predicts business outcomes would make programmatic DOOH easier to buy and significantly more effective."

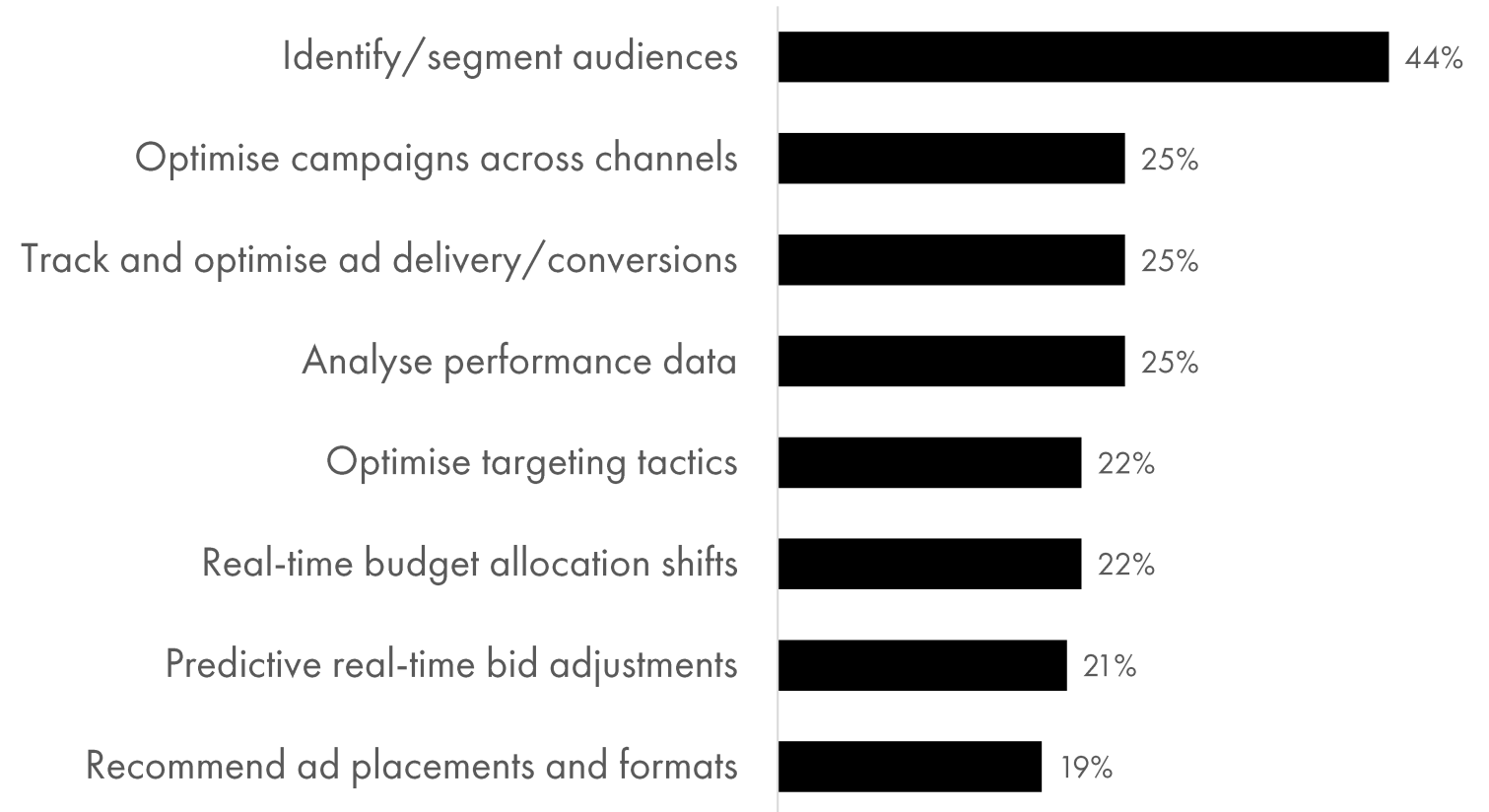
AI use cases exploring for deployment in digital out of home

The most common AI use case being explored across the industry is to identify or segment audiences.

“The next step isn't more inventory, it's smarter automation. AI-powered planning that recommends locations, optimizes creative by context and predicts business outcomes would make programmatic DOOH easier to buy and significantly more effective.”

– agency respondent

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



Source: IAB Australia Programmatic Digital Out of Home State of the Nation Report 2026 n=163 decision makers in ad agencies.

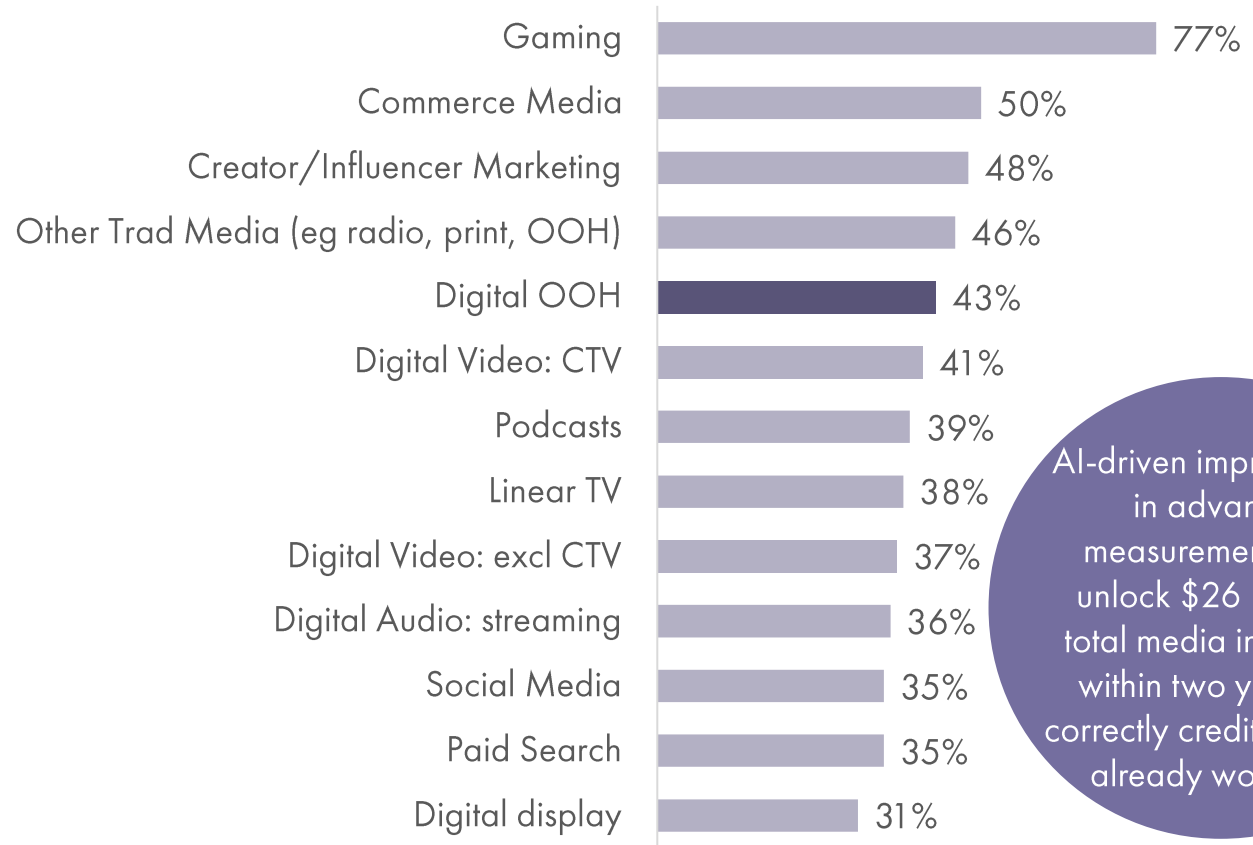
Q - Which of the following AI use cases are you exploring for deployment, or have deployed in the digital out-of-home campaign lifecycle?

unified, cross-platform measurement of campaign outcomes is challenging

While US ad buyers believe all channels suffer from representation gaps in OOH and DOOH are frequently cited as underrepresented. To optimize ad spend, measurement must reflect the full media mix.

AI could enable more holistic measurement by making it easier to incorporate additional channels and data —essential for truly optimising ROI.

IAB US State of Data 2026,
% of US ad buyers who say channel is underrepresented in MMM*
(amongst MMM users with line of sight into each channel)



AI-driven improvements in advanced measurement could unlock \$26 billion in total media investment within two years, by correctly crediting what's already working.*

* Source; [IAB US State of Data 2026](#)

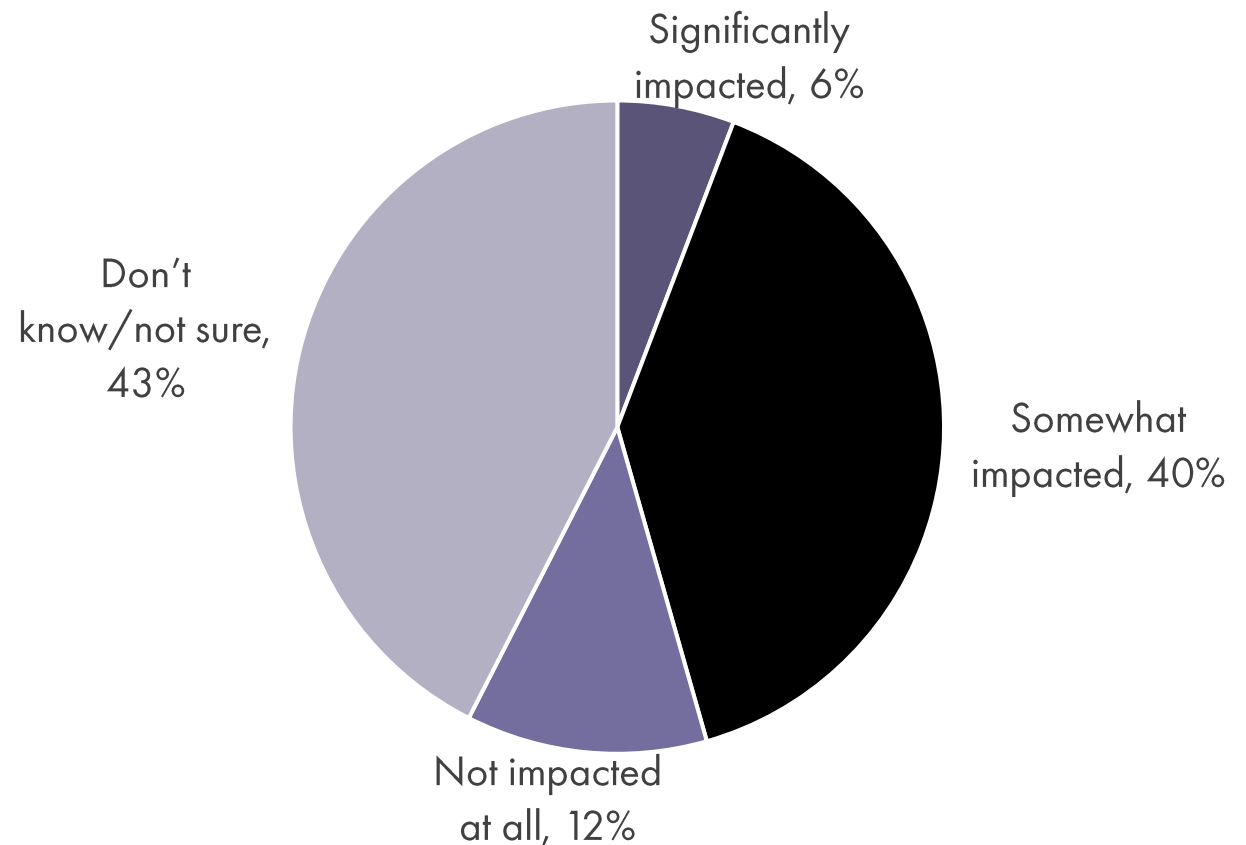
impact of Australian privacy legislation reforms on DOOH

46% of agencies think digital out of home advertising opportunities are being impacted by recent and likely future Australian privacy legislation reforms, down from 64% last year.

Uncertainty has grown significantly, with 43% now unsure, compared to 21% last year.

Recent [OAIC pixel determinations](#) have possibly created some uncertainty, not because the OAIC's message is unclear—its message is that behavioural tracking data used to single out individuals can be personal information—but because advertisers do not yet know how broadly that interpretation will be applied outside the health sector, what compliance measures will ultimately be regarded as sufficient, and how much of the existing digital advertising ecosystem will need to change as a result.

impact of recent and likely future Australian privacy legislation reforms on digital out of home advertising opportunities



further resources

2025

dooh buyer's guide

dsp reporting matrix

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dooh buyer's guide

dsp reporting matrix

Yes, standard within plan

Overrepresented from DSP

Not available

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dsp					
delivery	plays				
	impressions				
	impression multiplier				
	pricing indicator				
location	bid requests / responses / won				
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	latitude / longitude				
	city / region				
other	cap				
	frame id				
	screen name				

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