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The Omnichannel Tipping Point

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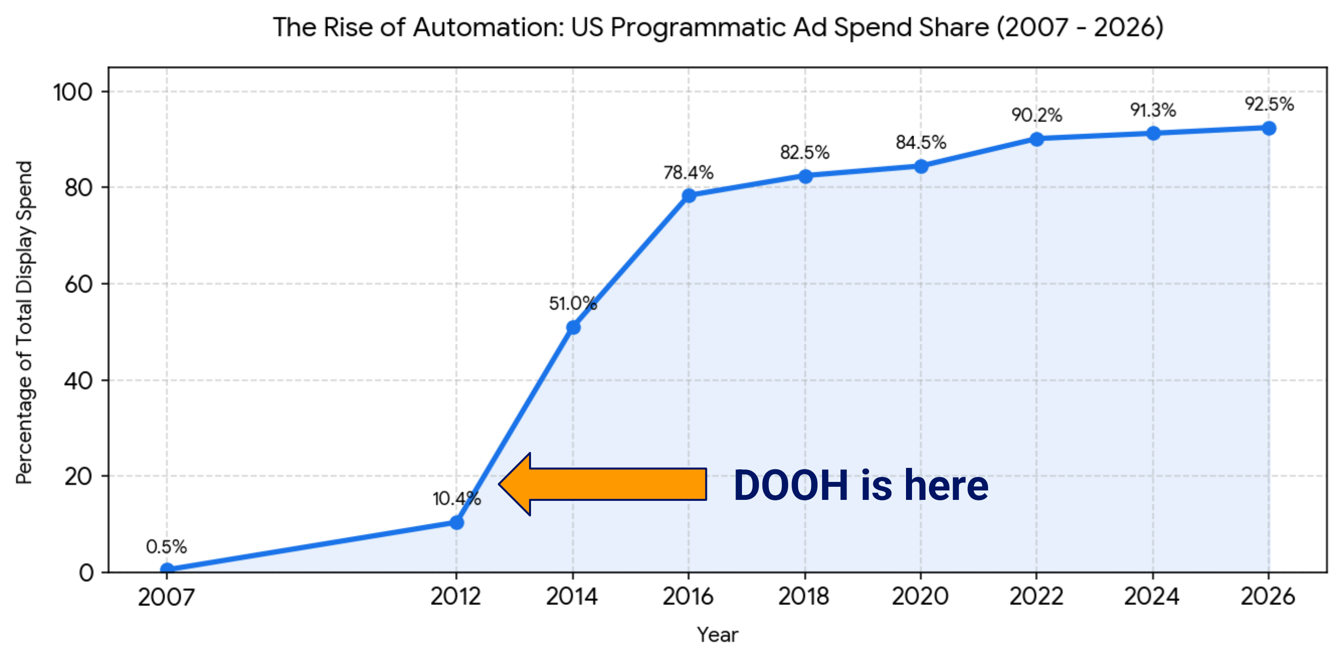
X

PLACE EXCHANGE

by Broadsign

Programmatic DOOH has reached the tipping point

In online advertising, programmatic saw an tipping point in 2012 thanks to omnichannel DSPs



Source: eMarketer

Our own data shows clear evidence of the inflection

PX “Gong” Tracker (booked campaigns exceeding $25K spend)

Comparing full-year 2025 to 2026 through May 15, we are seeing:

- 64% more campaigns per month
- Campaigns are 68% bigger
- More 7 figure gongs!

May 2026 was larger than November or December of 2025

PX Q4 to Q1 Spend Dropoff (Q4 is typically ~35% of FY spend, while Q1 Is typically ~18%)

$\frac{\textbf{Q1 2024}}{\textbf{Q4 2023}} = 52\%$

$\frac{\textbf{Q1 2025}}{\textbf{Q4 2024}} = 64\%$

$\frac{\textbf{Q1 2026}}{\textbf{Q4 2025}} = 72\%$

- In a mature ad market, the Q1/Q4 drop would be roughly constant
- Instead we see Q1 approaching Q4 levels, due to the large influx of spend
- YoY H1 2026 grew by over 150%

Why?

Why has it taken longer for programmatic DOOH to take hold vs. other digital channels?

- Structural differences (1:many, loop-based buys, locations vs. audiences, etc.)
- Fragmented media owner & technology landscape
- Buyers want “one pane of glass” but historically mixed posture from omnichannel DSPs
- Inertia of specialised buying entities

Why are we seeing acceleration now?

- Increased buyer awareness of and demand for structural advantages (reach, relevance, trust, cost, quality)
- Data parity - location data enables audience targeting & outcome measurement on par with other channels
- Rise of retail media (including in/at/near store)
- Demand for video everywhere (including live events)
- **Omnichannel DSPs are now *all* leaning in**

The Real World is now omnichannel

Traditional digital vs DOOH

The issues with traditional digital

- Consumers don’t trust it
- $1 in every $3 served to a non-human
- Dividing society
- Attention is tanking

Why DOOH represents a real alternative for marketers

- DOOH is the most trusted digital channel
- No fraud
- The last broadcast medium
- The best creative experience
- Premium video, live sports & RMNs

Live Sports

30 Seconds Media, 33 Convenience Connect, 8X, A Lot Media, abba, Abcon Media, ABU, Allvision, AOS, ATM Espectaculares, atmtv, ATTECH, BillboardPlanet, BCTV, Blue Label Media, brandedcities, brand.digital, Cineplex, charge FUZE, Checked Up, City Outdoor, cityvision, DOOH YOU LIKE, Doohmain, Check6, eimedia, DreamMedia, EB, ECN

Vertical Short-Form Video

AMC Networks, Brapex, Brookfield Properties, Civic Outdoor, Clear Channel, Coinstar, Activate Outdoor, adams, ad outpost, adbility media, adFUZE, eletromidia, ACMS, astral, Atmosphere, AVIP, Bulletin Displays, Bulletin, 3IGBANG, buzzwifi, Corner Media, coupr, curb, ELONEX, eme.pe, emplace, ELAN media, Edison Interactive, cora, airtango

Premium Video

CEF, ADKOM, Adriatica Pubblicita, AdStash, ADVANA, adPlanet, AdOnMo, X media, Bauer Media Group, BackLite, ballyhoo media, BARBOARDS, Best Buy, DISTRICT, Campus Service, CVIEW, CAPTIVATE, CARMINATI, CBL, Cedar Fair, DAOOH Network, DINAMIX, directwest, EOS, EVOLV, screens, exteriorplus, Exomedia, eye, Retail Fluent, sky media, Advertising Solutions, Western Union

In-Store Audio

FINCH, Dream, REVTV, global, GO Media, IMEDIA CENTER, Impacto Visual, Fair Mediashuttle, Ena Outdoor, FIREFLY, FNAC DARTY, KBH, KeyMedia Network, GSA, Grocery TV, Grupo Expansion, INEO, in-Store Media, INNOVARE, INSIGHT, imu, neo, KGC, Lamar, LAPIS, LATINAD, Precision Media, MEDIALIIGA, media transports, Mass Media, MediaOne, NAMG National Arena Marketing Group, nmc, NBS Notice Board Systems, n-compass, NCM, MEDIAMOND

Point of Care

STARLITE, SPOTLIGHT Cinema Networks, Statements Media, PUBBLIMUN, PUBLICITTA, BEREIK, OXXO, OXIALIVE, Outcon, PACIFIC, POA, PatientPoint, PATTISON, PYRAMID, Pursuant Health, EYESHOT MEDIA, QUEBECOR, QMS, Screen Dollars, Screen Network, screenverse, sellrtv, RZK digital, SANFORD Outdoor, Stellar Ace, Stream Outdoor, STINGRAY, TRUESYNCMEDIA, TURNADON, DOOH, tumedio, kinective, video elephant, Publish, vertical impression, Plan-B, Pearl Sean Outdoor

RMNs

terraboost media, polsat media, Westfield, BevMo!, CEN, centrecom, FOXPOINT, FRAMEN, FREEOSK, FUELMEDIA TV, STV, HI! STREET, HIGHTIDE, HOPEHYDRATION, horizon!, GuadalMedia, ISM, iPAS, IWALL, ivee, LASERWALL, Liquid, Livesystems, DOHA, isite media, mediacorp, mediafeedia, MEDIATEKO, Mile High, NRS Digital Media, New Tradition, OO Ocean, OLA MEDIA, OHMYDIODE, OMX, ONE, Intersection, LEDTRUCKMEDIA, LIMITEDSPACE, FABLED MEDIA

Display

GIRAUDY, GETICA, ids media, JCDecaux, GLASSCAST, GOLDBACH NEO, GLOBAL, Retail Media Services, IGP, imc, IK Outdoor, ICEBOX NETWORK, IMAGE OUTDOOR, Alight Media, jetline, JOLT, JVC, KEVANI, Schiphol, kazoo digital, BIGOUTDOOR, Loop, London Lites, MACERICH, market medios, massiva, CENTRE VILLE, dolphin, MOOVE MEDIA, MOVINGUP, my adbooker, NANOVO GROUP, OSG, OUTERNET, OUTFRONT, OUTSHINE, FC Media

Epic Large Format

PEARL, Rajawali, seagulls, ims sensory media, Pecan Pie Productions, PERCEPTION, Perpetual Media, Pixel, reach tv, Reagan, realmedia, reklam istanbul, SHARK EXPERIENCE, SHELF NINE, shinka, SIMON, kanawai, displayplay, swiftmile, Tanger, Bulletin, LOON, URBAN VISION, VENDO, VELOCITY, VICINITY, VMO, wayap, Venga, impulso, telesia, SIPEA, STRÖER

Broadcast Reach

GEOMETRIA, POPP VISION, promo, PROMO GROUP, PRIMEDIA OUTDOOR, PUBLI MOVIL, PUBLIC, i-Co, reveel., ROCKBOT, ROUTE, ivsgroup, smartoutdoor, SOMO, SDN Sports Digital Network, LOCALLEADER, open media, mobilAd, motio, Smartify, mob TV, TOPGOLF, TOUCHSOURCE, TouchTunes, Trailhead, Travel Plaza Media, GPOVALLAS, WETEK, winkel, WOW, YAZLE, GymTV, ike, ORANGE BARREL MEDIA

So what happens next?

If history is a guide, we will see:

- **Increase in demand**
  - More new advertisers activating programmatic DOOH.
  - More "always on" spend from advertisers already in the market.
- **Change in the sources of demand**
  - Large holdco share declines ("Big 6" controlled 45% of US ad spend in 2019, to ~28% today).
  - Specialist share of OOH spend declines, as OOH is integrated with other channels.
  - Brand direct / in-house spending has grown from 10% in 2019 to ~30% today, driven by technology.
  - Small/medium agencies have held share (which means spend has grown with the market).
- **Increased focus on PMPs and PG**
  - Combines predictability/control of direct buys with ease/automation/power of programmatic (targeting, creative, data, measurement, etc.)
  - Q1 PG spend exceeded all of 2025 (which was ~3x 2024)!
- **Standardisation of measurement**
  - Exposure measurement - viewsheds, impressions, audiences, reach, frequency
  - Outcome measurement - upper/mid/lower funnel results not just in isolation, but integrated with other channels (MMM, MTA)

Programmatic DOOH has reached the tipping point…

And there is A LOT of growth and innovation to come!

Thank You