

H1 2022

**Place Exchange
Programmatic OOH
Trends Report**

July 2022

Overview

The Place Exchange Programmatic OOH Trends report provides a snapshot of select spending patterns within the Place Exchange platform after analyzing delivery across billions of programmatic OOH impressions. These results compare data from H1 2022 with data from H2 2021.

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1 Select Takeaways

Select Takeaways

- OOH spending continues to be evenly spread across a mix of advertiser verticals.
 - Health/Fitness was the largest and fastest-growing category, driven by a significant increase in pharma spending, leveraging the targeting, creative delivery and measurement innovations in programmatic OOH.
 - Other top-spending categories included Food/Drink, Tech/Computing, Personal Finance, and Business, with strong growth observed in Style/Fashion and Automotive from H2 2021 to H1 2022.
- Billboards continue to be the largest single asset category by spend at 41%, but other OOH formats have grown share significantly, including Screens/TVs, Display Panels, Kiosks, and Point of Sale screens.
- The average CPM for programmatic OOH inventory increased from \$7.10 to \$7.47, with most OpenOOH Venue Categories seeing price increases, notably Office Buildings, Point of Care, and Health & Beauty venues.
- Spending on programmatic Video OOH grew by 60% from H2 2021 to H1 2022, with video ads now representing almost half of spending on video-enabled screens.
- Programmatic OOH buyers continue to transact predominantly via Non-Guaranteed deals, which offer high levels of flexibility.

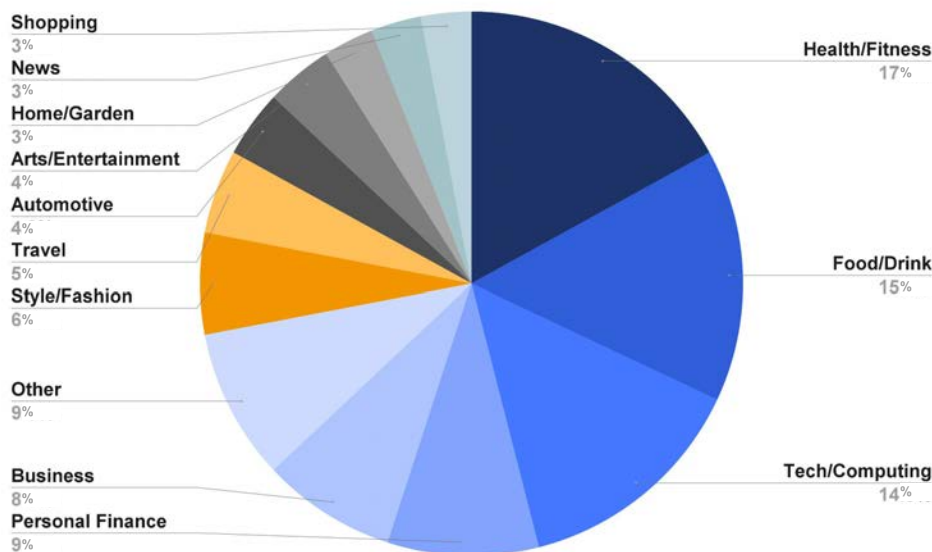
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Advertiser Category Trends

Top Spending Advertiser Categories

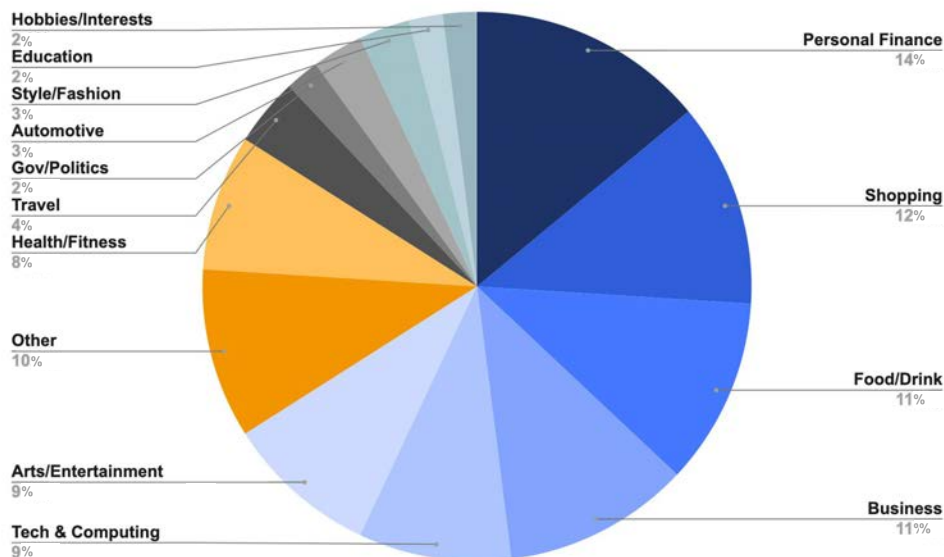
By IAB Categories

H1 2022



In H1 2022, Health/Fitness was the top-spending category, reflecting the significant growth of pharma spending in OOH. Overall spend was balanced across a number of categories, including Food/Drink, Tech/Computing, Personal Finance, and Business.

H2 2021



In H2 2021, spending reflected a balanced mix of categories, as the US continued to emerge from the pandemic and many advertisers resumed spending in OOH. Leading the way were the Personal Finance, Shopping, Food & Drink, and Business categories, followed by Tech & Computing, Arts & Entertainment, and Health & Fitness.

Advertiser Categories with the Highest Growth*

H2 2021 to H1 2022

		Growth Rate
	Health/Fitness	64%
	Style/Fashion	49%
	Automotive	31%
	Food/Drink	20%
	Tech/Computing	12%

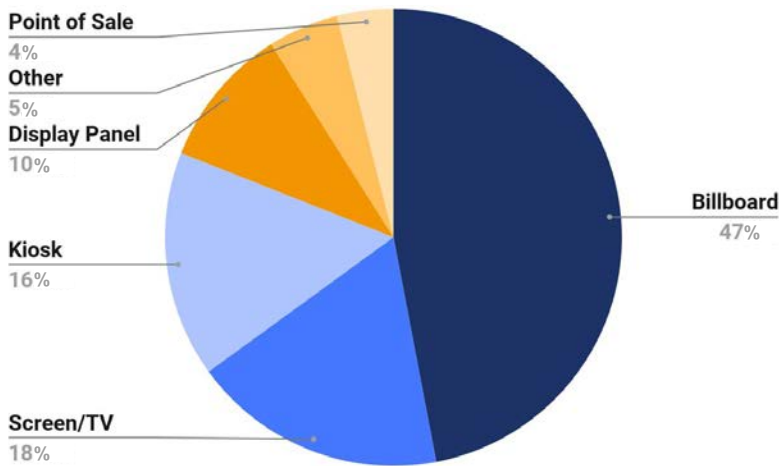
* Includes only categories that represented at least 2% of total spend in H2 2021.

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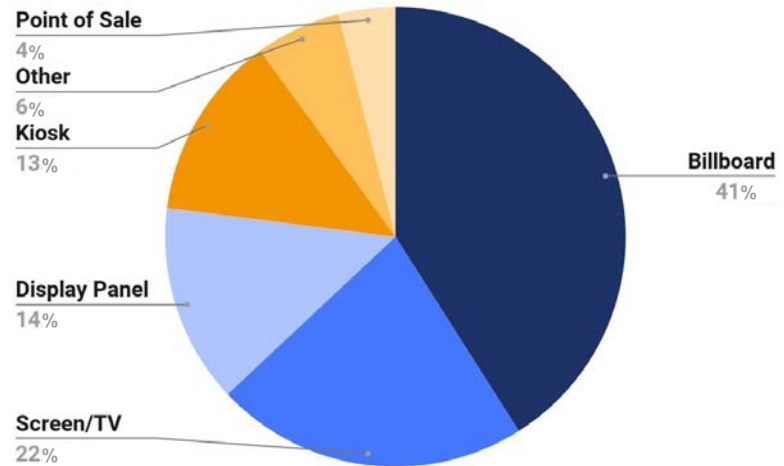
Asset Category and Pricing Trends

Spend Distribution by Asset Category

H2 2021



H1 2022



Place Exchange Asset Category designations

Billboard

Large format, free standing, elevated digital displays.

Point of Sale

Screens on a terminal or interface at which purchase transactions take place between a merchant and a customer.

Display Panel

Mid-to-large format digital displays mounted at or near eye level.

Kiosk

Interactive displays that are part of an easily-accessible, free-standing structure.

Screen/TV

Small-to-mid size digital displays delivering information to a captive audience.

Other

Elevator Display: Displays located within elevators.

Shelter: A ground level, free standing enclosure such as newsstand or a bus shelter.

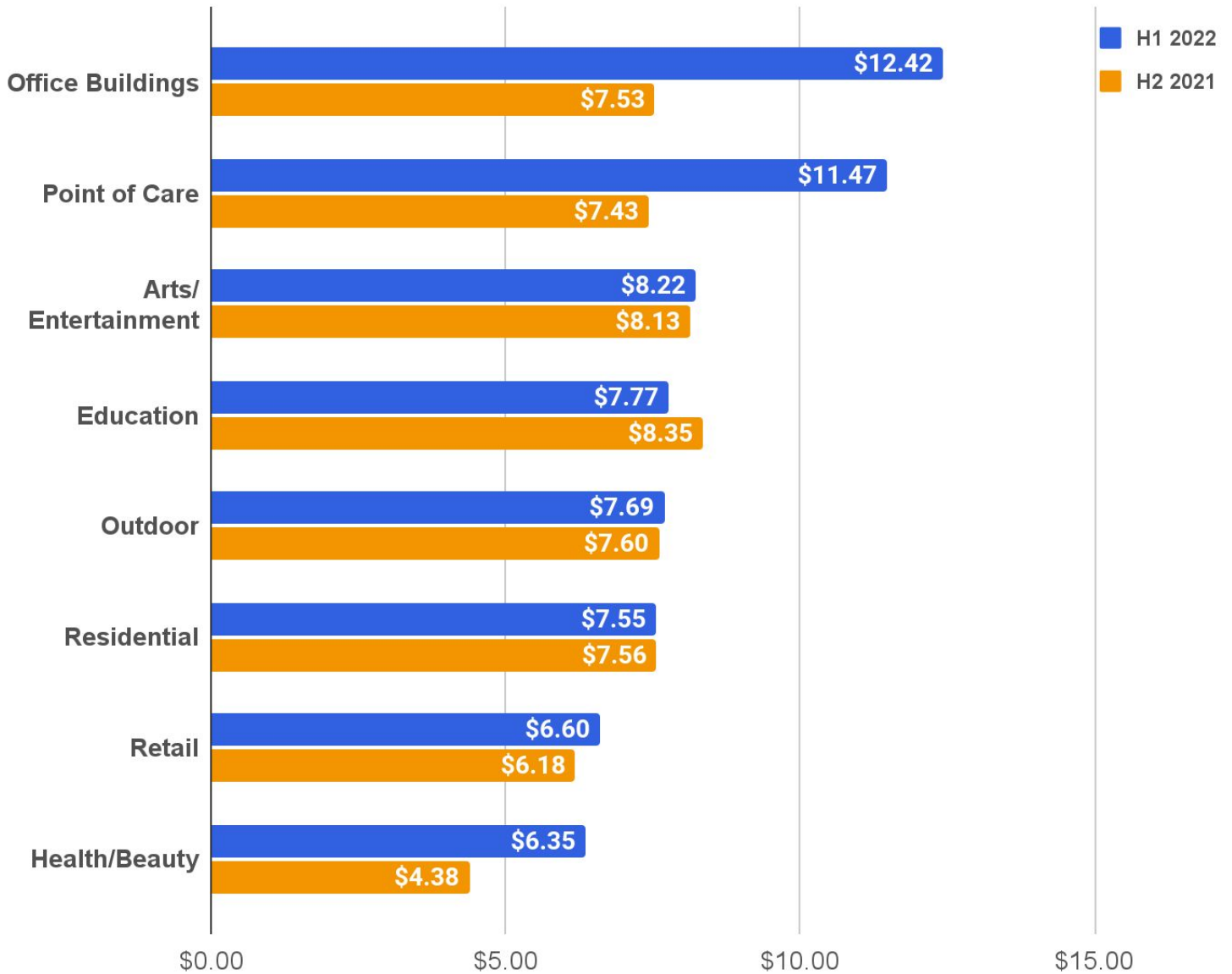
Spectacular: A large, non-standard display located in high impact areas.

Vending Machine: An automated machine through which various goods may be purchased.

While billboards represent the largest single asset category, other formats (including Screens/TVs, Display Panels, Kiosks, and Point of Sale) have grown share and collectively represent nearly 60% of spend.

Average CPMs by Venue Category

By OpenOOH Venue Categories



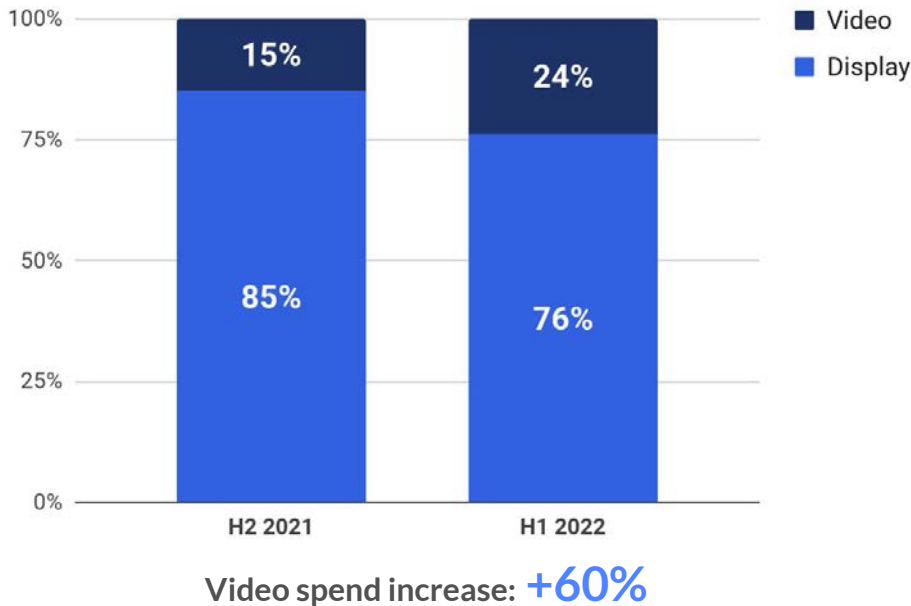
Average CPMs across most OpenOOH Venue Categories increased from H2 2021 to H1 2022, most notably for Office Buildings, Point of Care, and Health & Beauty venues. Education CPMs declined slightly, but still remain healthy. Overall, the average CPM for H1 2022 was \$7.47, compared to \$7.10 for H2 2021.

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Creative Format and Transaction Type Trends

Display & Video Spending

All Display & Video Spend



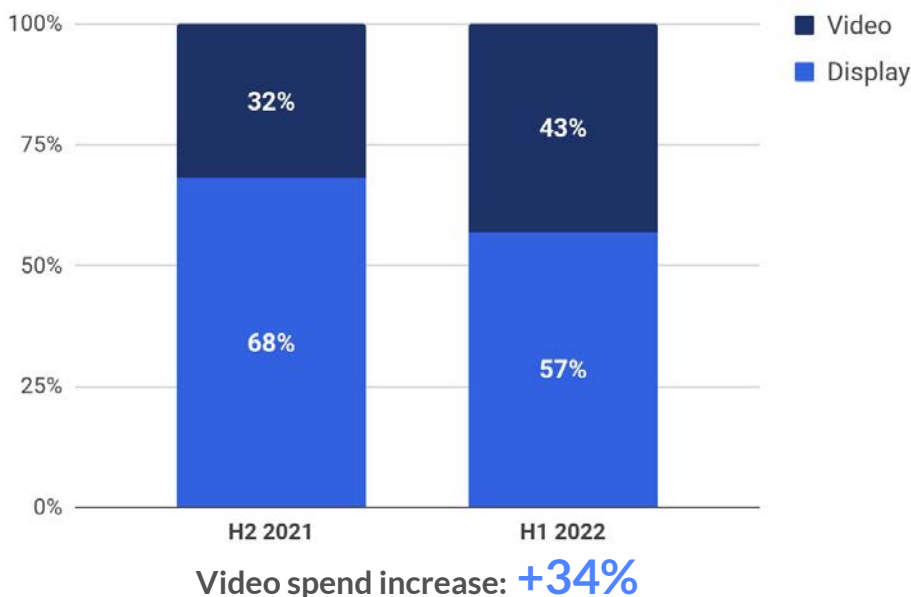
Programmatic Video OOH spending continues to increase, growing by 60% from H2 2021 to H1 2022, reflecting the demand for high-quality video inventory.

Percentage of video spend by video ad duration:

- 15 seconds: 83%
- 30 seconds: 9%
- 10 seconds: 4%
- Other: 4%

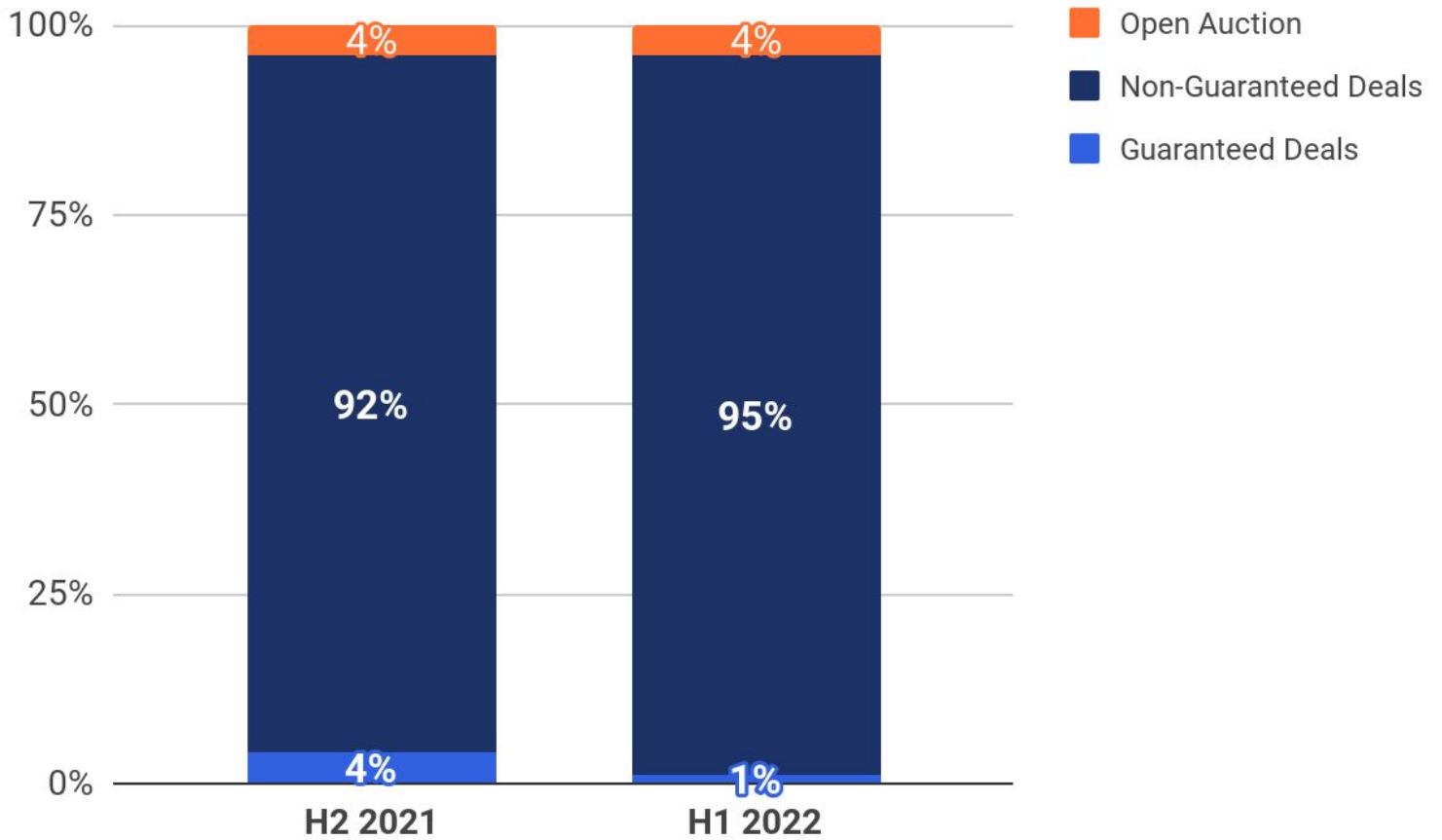
Display & Video Spend, ex-Billboards

(i.e., video-enabled screens only)



When we filter the analysis to only include OOH screens that are video-enabled, Video makes up an even larger percentage of the spend, with **Video quickly catching up to the 50/50 mark with Display.**

Spending by Transaction Type



Programmatic OOH buyers continue to prefer transacting on **non-guaranteed deals**, which offer high levels of buying flexibility and allow marketers to easily scale campaigns up or down in response to market dynamics and evolving consumer behavior patterns.

About Place Exchange

Place Exchange is the leading SSP for programmatic out-of-home media. Integrated with omnichannel DSPs, Place Exchange's patented technology uniquely offers agencies and advertisers the opportunity to fully unify buying and measurement of OOH media with other digital channels, leveraging the same workflow, creatives, reporting, and attribution as for online and mobile advertising. Place Exchange's unmatched premium supply ecosystem adheres to its Place Exchange Clear certification program that delivers buyers quality, consistency, transparency, and compliance. For OOH media partners, Place Exchange offers the opportunity to access untapped programmatic ad spend with full transparency and control.

For more information about Place Exchange, visit www.placeexchange.com.

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