# H1 2025 Place Exchange Programmatic OOH Trends Report

July 2025

PLACE EXCHANGE

# Overview

The Place Exchange Programmatic OOH Trends report provides a snapshot of select US programmatic OOH spending patterns within the Place Exchange platform, analyzing delivery across billions of programmatic OOH impressions. These results compare data from H1 2025 with data from H2 2024.

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# Select Takeaways

# Select Takeaways

- In H1 2025, the top 3 programmatic OOH advertiser categories in our data were Food/Drink, Tech/Computing, and Health/Fitness, collectively accounting for 39% of spend.
- Screen/TV (30% of spend) narrowly surpassed Billboard (29% of spend) for the largest asset category, highlighting the growth of video advertising in Digital OOH.
- However, Outdoor (including billboards and street furniture) remained the largest venue category at 51% of spend, followed by Retail (15%), Entertainment (11%) and Transit (10%).
  - Overall, the number of programmatic OOH screens increased by 16%, driven mainly by deployments at Entertainment, Retail, and Health/Beauty locations.
- The average CPM across all programmatic OOH inventory was $6.53 in H1 2025.
- Video ads accounted for nearly half of all programmatic OOH spend on video-enabled screens.
- While programmatic OOH supports a wide variety of creative formats, the majority of spending remained concentrated in a few formats, underscoring the ease of launching campaigns from a creative standpoint:
  - 15 seconds remained the most common duration for video ads (62%).
  - 83% of programmatic OOH video spend was attributed to the top 2 video ad sizes (WxH): horizontal 1920x1080 and vertical 1080x1920.
  - 85% of programmatic OOH display spend on static creatives was attributed to the top 3 display ad sizes (WxH): 1400x400, 1920x1080, 1080x1920.
- Programmatic OOH continued to transact predominantly via private deals, representing 96% of H1 2025 spend, given the high levels of campaign flexibility, price transparency, and media quality offered to buyers.
  - While Custom PMPs represented the majority of spend (62%), more buyers are leaning into the convenience and ease of Always-on PMPs (which grew to 29%) and spend Programmatic Guaranteed deals more than doubled to 5%, offering the benefits of programmatic combined with the quality and certainty of direct buys.

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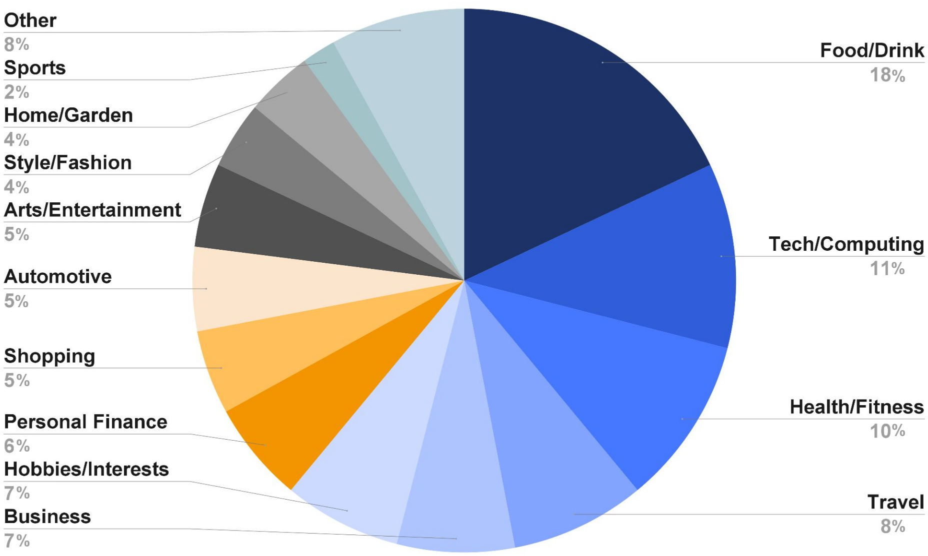
# Advertiser Category Trends

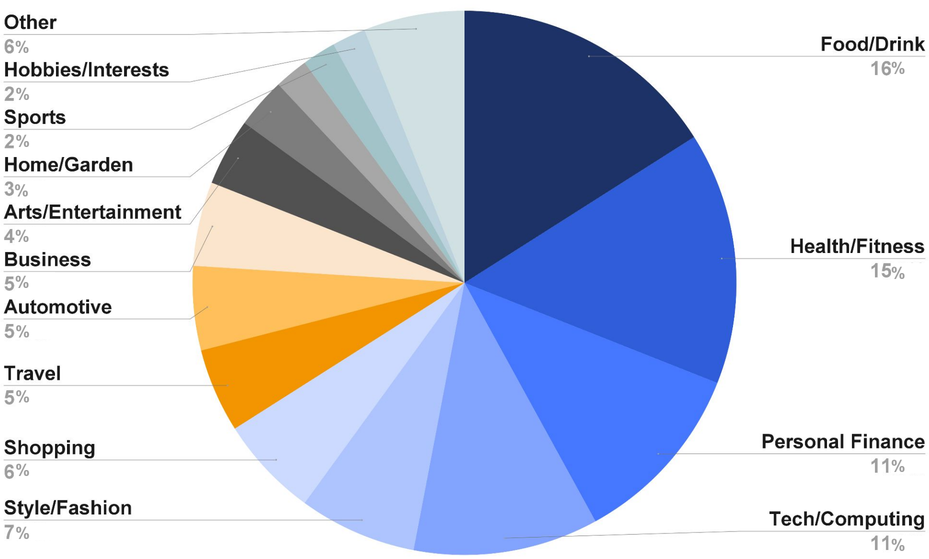
# Top Spending Advertiser Categories

## By IAB Category

### H1 2025 - Top Spending Advertiser Categories




### H2 2024 - Top Spending Advertiser Categories




Comparing H1 2025 to H2 2024:

- In both periods, **spend overall was balanced across a broad array of advertiser categories.**
- **The top categories in H1 2025 were Food/Drink, Tech/Computing, Health/Fitness, and Travel** collectively accounting for 47% of the spend.
- The Food/Drink, Travel, Business, and Hobbies/Interests categories gained share, while Health/Fitness, Personal Finance, Style/Fashion, and Shopping all lost share.

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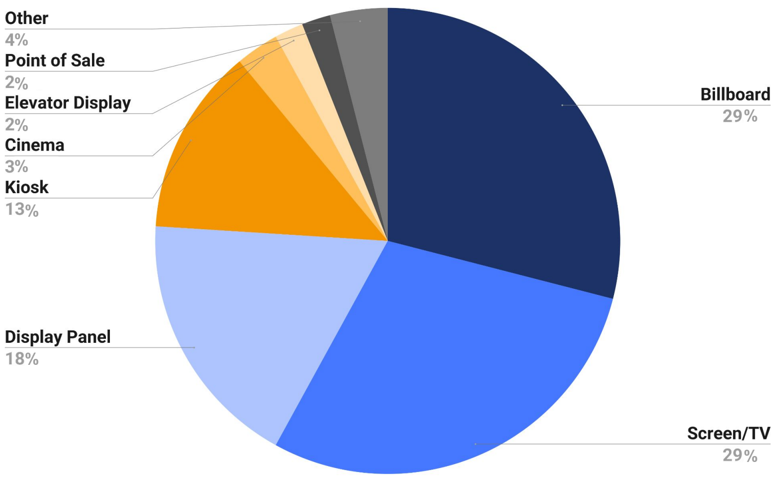
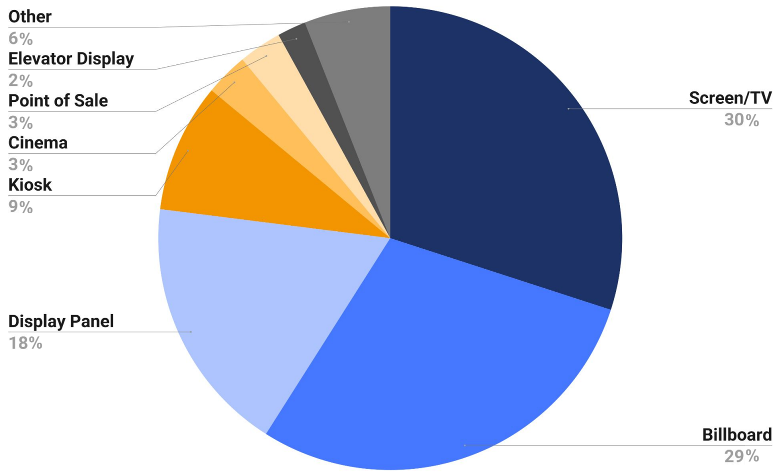
# Asset Category and Pricing Trends

# Spend Distribution by Asset Category

## H2 2024




## H1 2025




## Asset Category Designations

### Billboard
Large format, free standing, elevated digital displays.

### Cinema
Mid-to-large format digital displays mounted in-lobby or on-screen in movie theaters.

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

### Elevator Display
Displays located within elevators.

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

### Point of Sale
Screens on a terminal or interface where purchase transactions take place between a merchant and a customer.

### Screen/TV
Small-to-mid size digital displays delivering information to a captive audience.

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

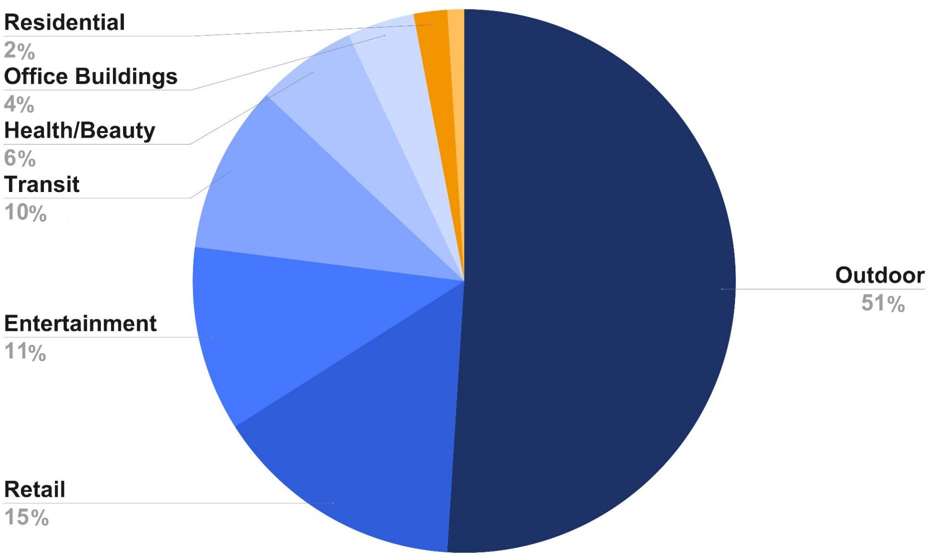
**Spectacular:** A large, non-standard display located in high impact areas.

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

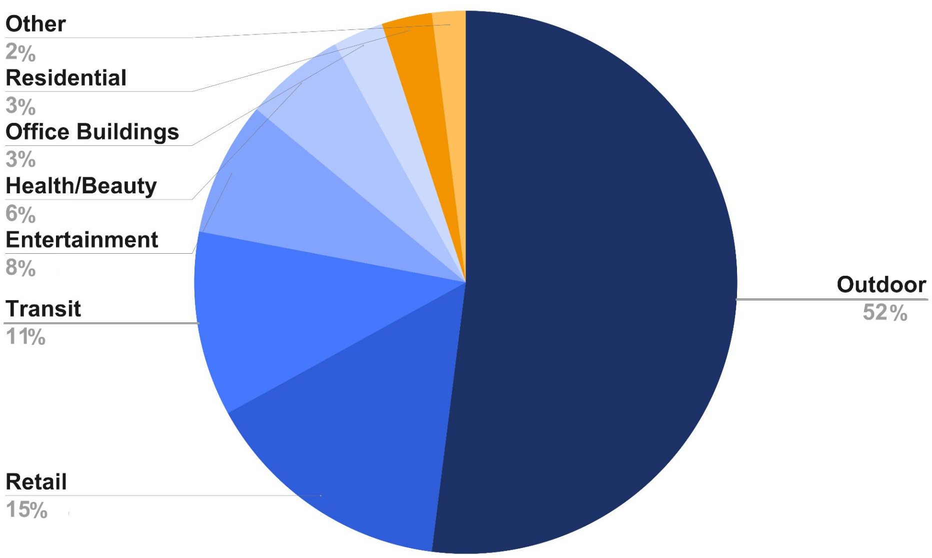
**Screen/TV narrowly overtook Billboard for the largest asset category,** at 30% of spend in H1 2025. This shift reflects the growing weight of video advertising in DOOH. While the share of spend by asset category shifts over time, overall spend on the platform continues to grow year over year, benefitting all asset categories.

# Spend Distribution by Venue Category

## H1 2025



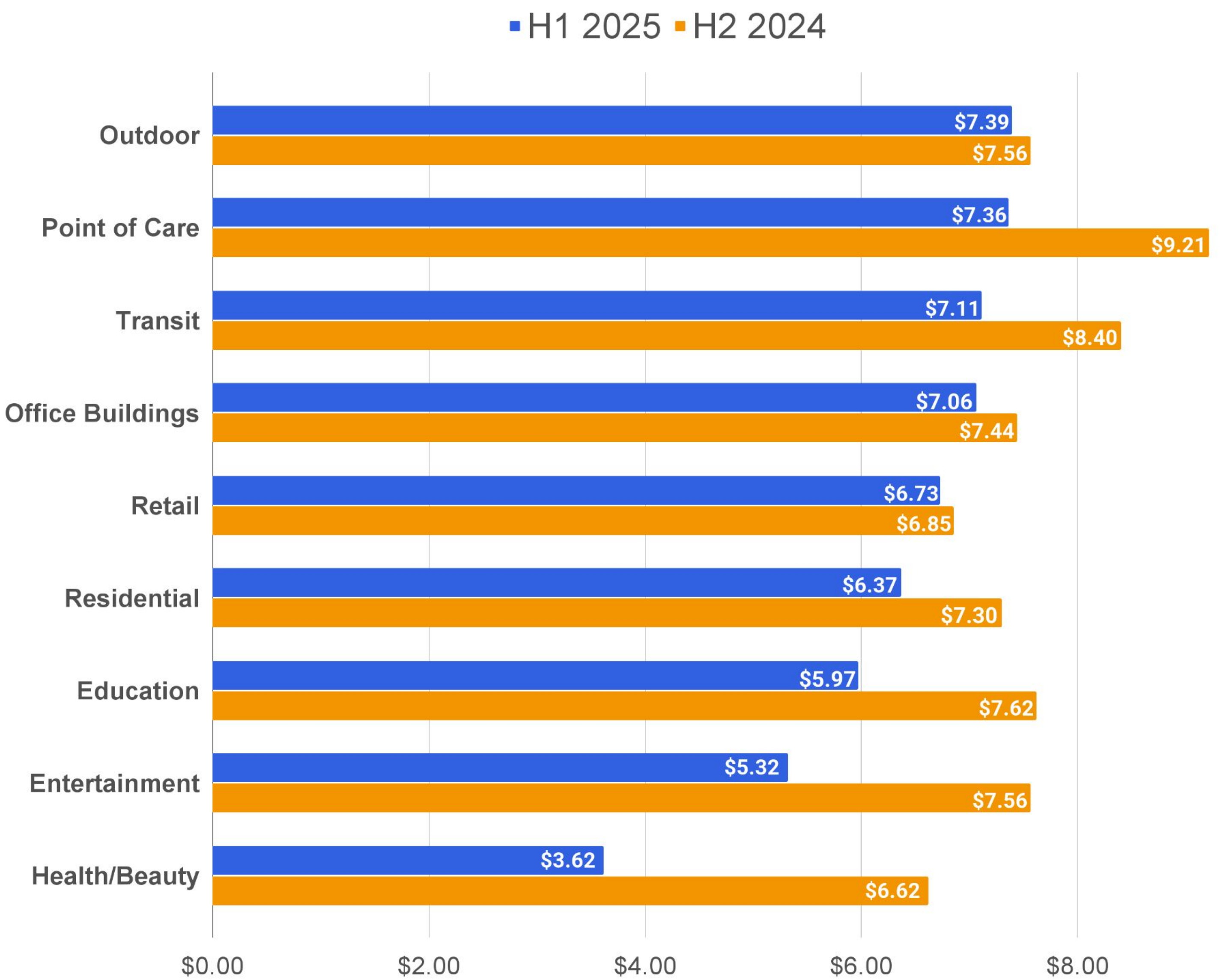

## H2 2024




Comparing H1 2025 to H2 2024:

- **Overall, spend by venue category remain relatively stable.**
- **Outdoor (including billboards and street furniture) remained the largest venue category,** with 51% of spend.
- **Retail was once again again the second largest venue category** by spend, followed by Entertainment and Transit.
- **Programmatic screen count (not shown) grew by 16%,** driven mainly by new screens in entertainment, retail, and health locations.

# Average CPMs by Venue Category




Overall, the **average programmatic OOH CPM for H1 2025 was $6.53,** a drop from the high $7.62 average seen in H2 2024, but broadly in line with historical averages from prior periods.

Outdoor and Retail (the largest venue categories by spend) saw only modest declines of approximately 2%, while other categories such as Point of Care, Education, Entertainment, and Health/Beauty saw larger relative declines.

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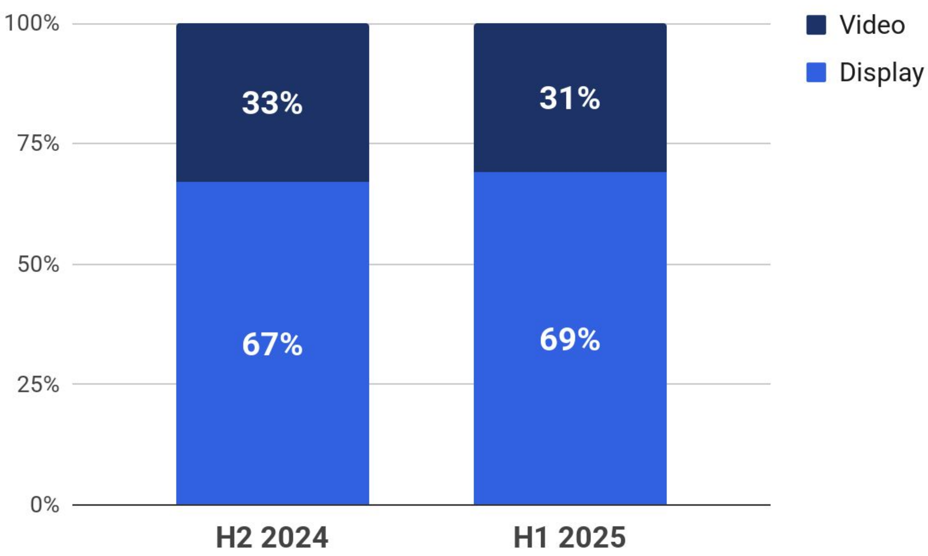
# Creative Format and Transaction Type Trends

# Display & Video Spending

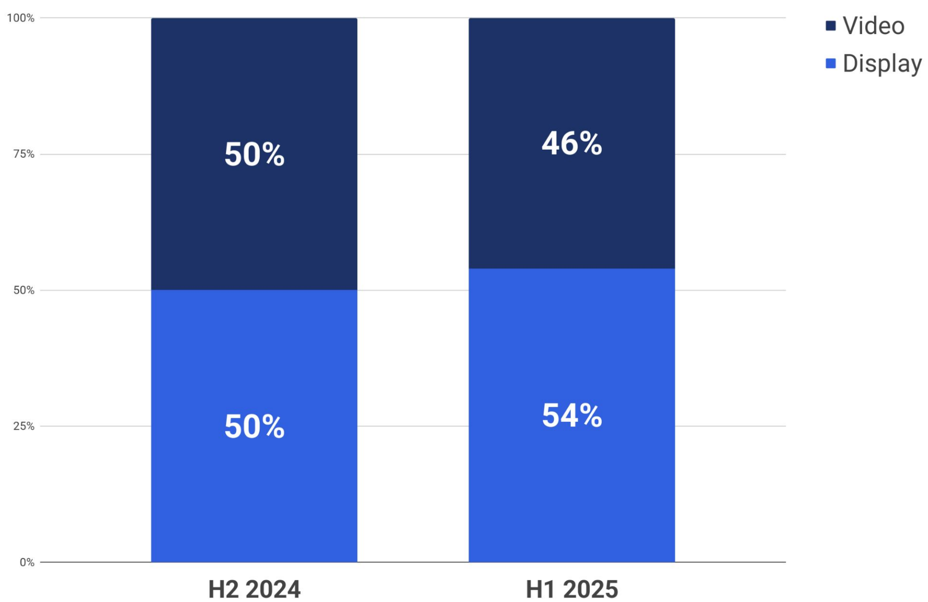
## All Display & Video Spend




**Programmatic OOH video spend generally held steady at about one third of all share,** slightly decreasing from 33% of all spend in H2 2024 to 31% in H1 2025.

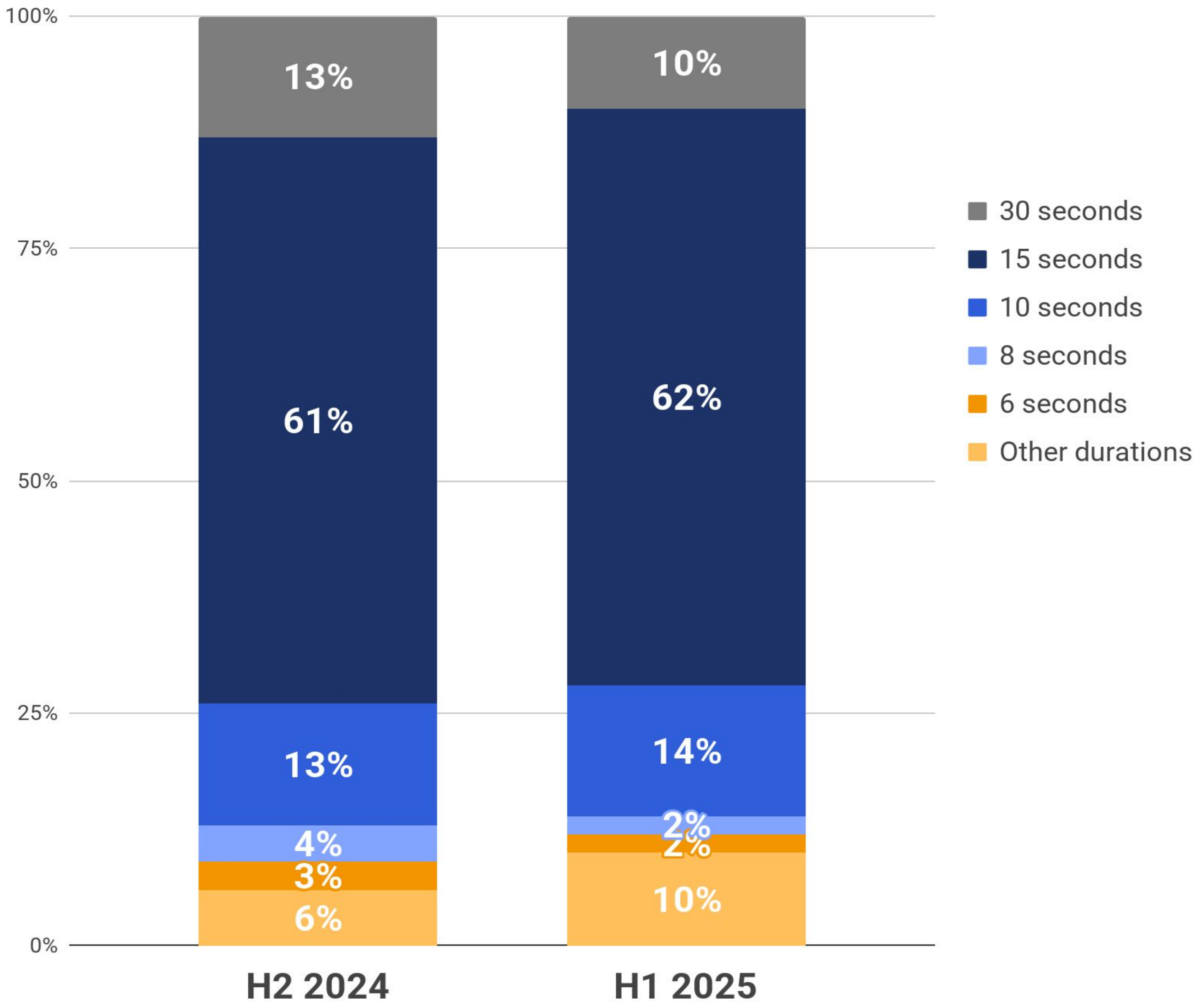
## Display & Video Spend, ex-Billboards

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




Filtering the analysis to include only OOH screens that are video-enabled, **video accounted for almost half of H1 2025 spend.**

# Video Spend by Video Ad Duration

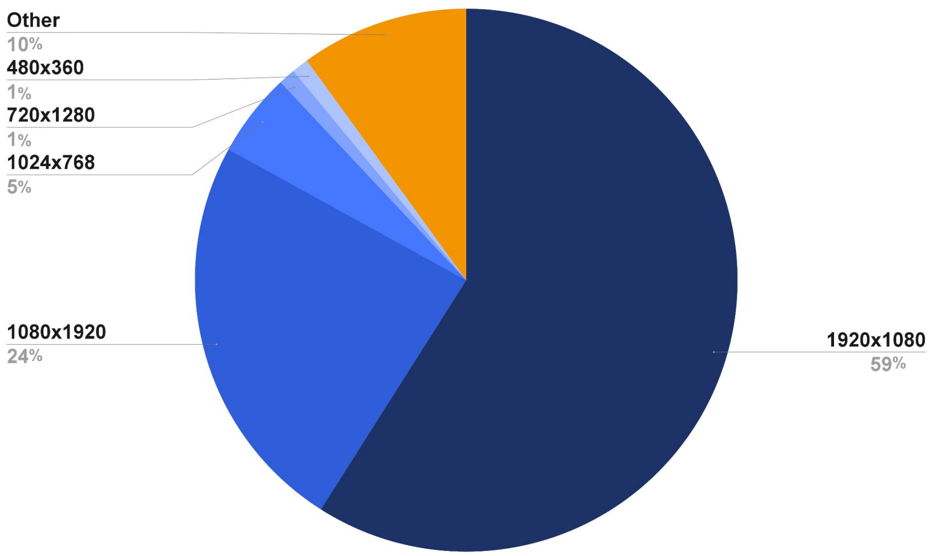



**15 seconds continued to be the most common video ad duration**, with 62% of video spend in H1 2025.

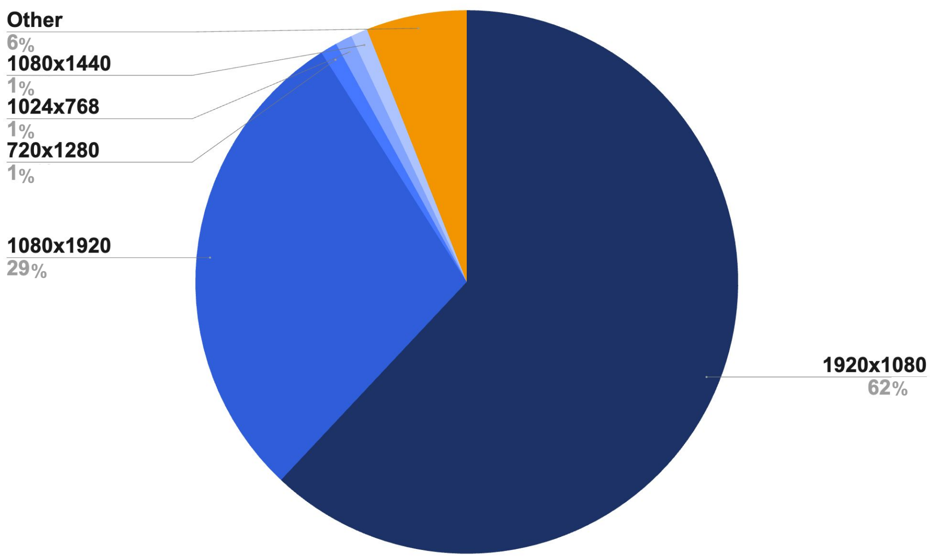
# Video Spend by Video Ad Size

## Width x Height for Video creatives

### H1 2025




### H2 2024




**The distribution of video spend by video creative size continued to be dominated by two sizes, which accounted for 83% of video spend.**

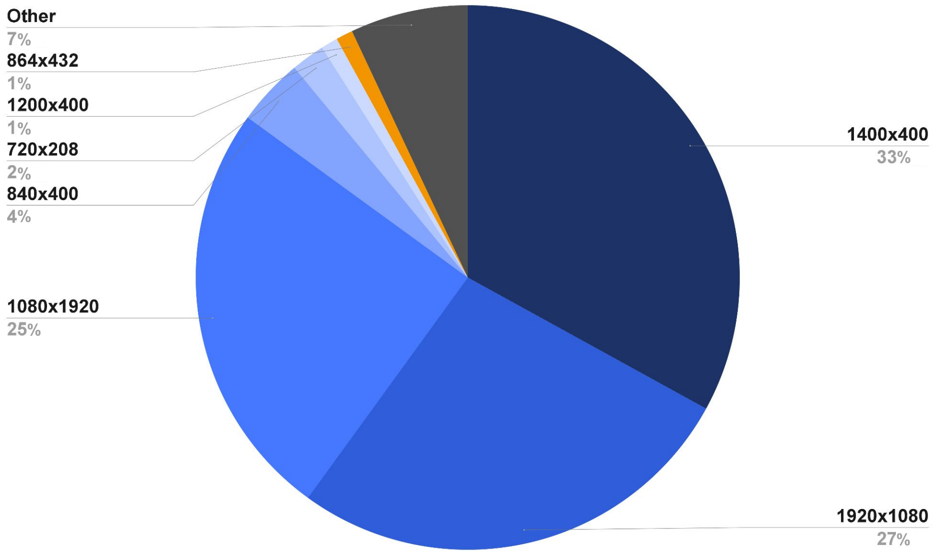
This further highlights the ease of running video creatives on programmatic OOH inventory.

The leading horizontal video size (1920x1080) decreased slightly from 62% to 59% of video spend for H1 2025, while the leading vertical video size (1080x1920) also decreased slightly from 29% to 24% of video spend.

# Display Spend by Display Ad Size

## Width x Height for Display creatives

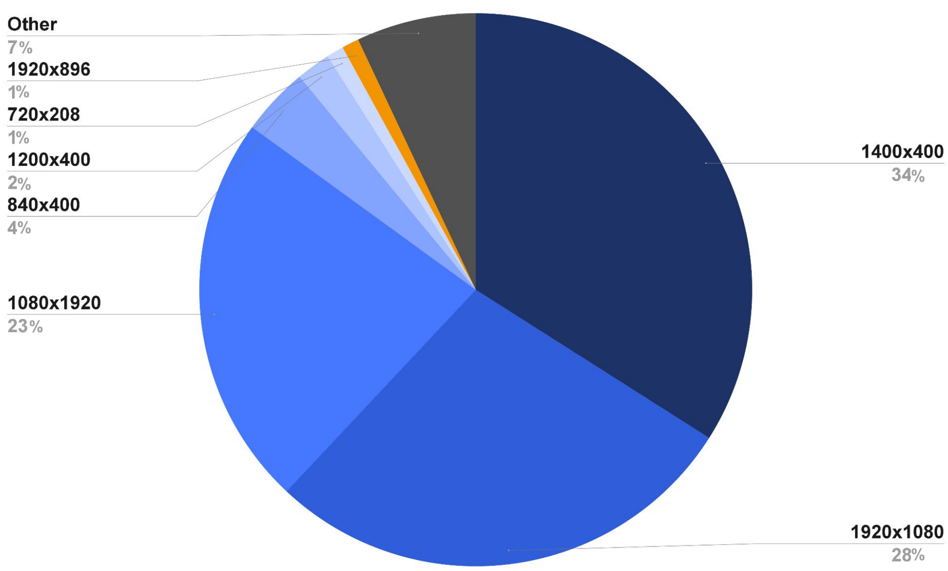
### H1 2025




**The H1 2025 distribution of display ad spend by creative size was virtually identical to H2 2024.**

**The top three display ad sizes collectively accounted for 85% of display spend** (the same as H2 2024), continuing to underscore the ease of launching display campaigns from a creative standpoint.

### H2 2024

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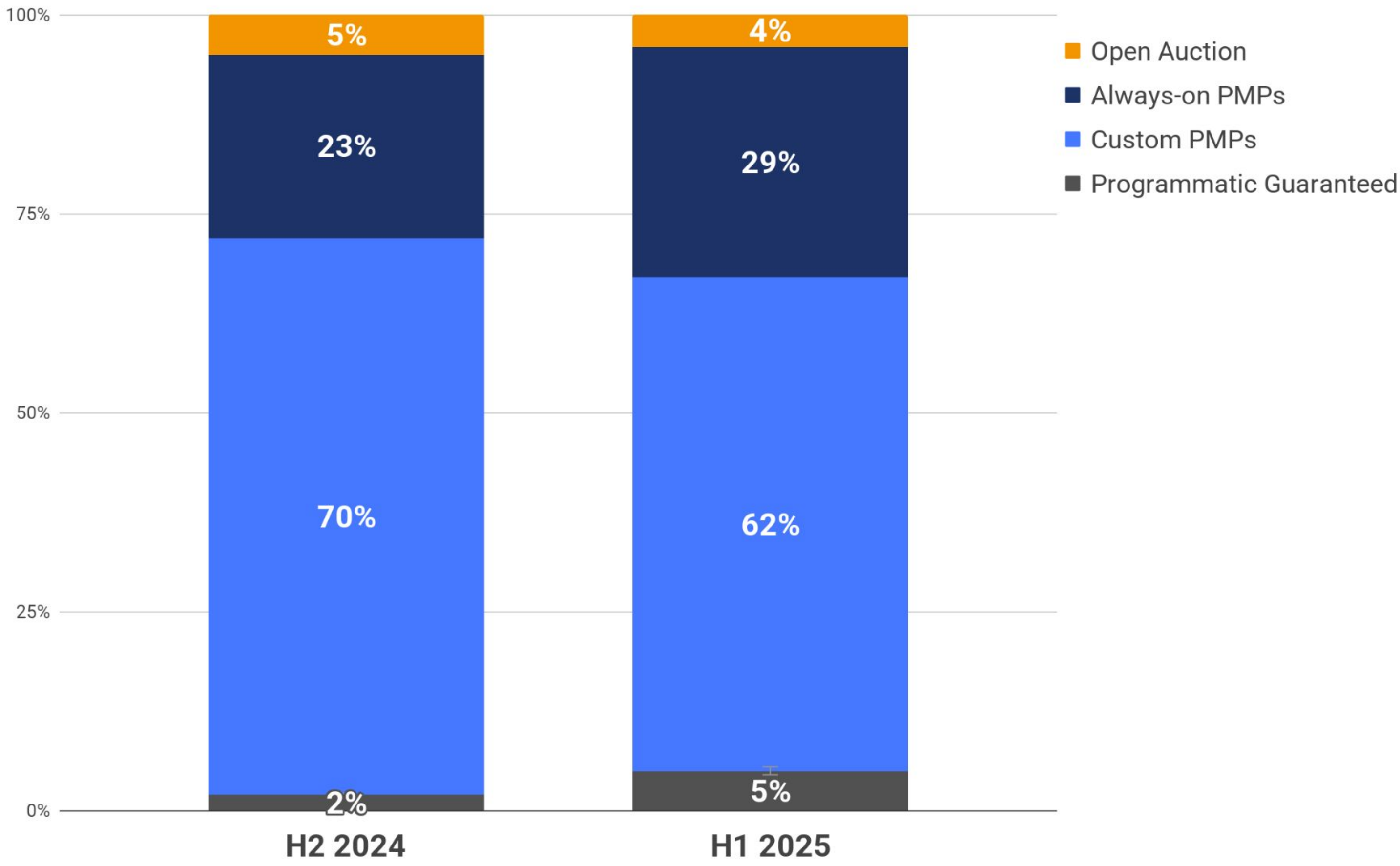
# Spend by Transaction Type




**Programmatic OOH buyers continue to overwhelmingly prefer transacting with private marketplace deals (PMPs)**, collectively representing 96% of spend in H2 2024.

Private deals remain strongly preferred over open auction, as they offer highly flexible campaign delivery, transparency around media pricing, and certainty around inventory quality - all factors that are of high importance to buyers.

Custom PMPs continued to represent the majority of spend at 62%, but more buyers are leaning into the convenience and ease of Always-on PMPs, which grew to 29% of spend. Notably, Programmatic Guaranteed deals, while a small percentage of spend, more than doubled from 2% to 5% as they combine the powerful benefits of programmatic with the quality and certainty of direct buys.

# About Place Exchange

Place Exchange is the leading independent SSP for programmatic out-of-home media. Integrated with omnichannel and OOH 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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