

H2 2022

**Place Exchange
Programmatic OOH
Trends Report**

February 2023

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 H2 2022 with data from H1 2022.

Table of Contents

- 1 Select Takeaways**
- 2 Advertiser Category Trends**
- 3 Asset Category & Pricing Trends**
- 4 Creative Format Trends**

1 Select Takeaways

Select Takeaways

- From H1 2022 to H2 2022, the top 4 programmatic OOH advertising categories remained the same (Food/Drink, Health/Fitness, Personal Finance, and Tech/Computing) and accounted for just over half of spend.
 - The fastest growing categories in dollar terms were Shopping, Personal Finance, Careers, Food/Drink, Arts/Entertainment, and Health/Fitness.
- Billboards continue to be the largest single asset category by spend, but with increasing screen counts, other formats (notably place-based screens/TVs, display panels, and kiosks) have grown to represent a significant portion of overall programmatic OOH spend.
- The average CPM for programmatic OOH inventory decreased slightly from \$7.46 in H1 2022 to \$7.17 in H2 2022.
- Video continues to represent a sizeable portion of spending, at roughly 40% of programmatic OOH spend on video-enabled screens.
- While programmatic OOH supports a wide variety of creative formats, the majority of spending is concentrated in a few formats:
 - Over 75% of programmatic Video OOH ads are 15 seconds in length, though shorter video durations are gaining in share.
 - Over 80% of programmatic OOH display spend on static display creatives is attributed to the top 3 ad sizes (WxH): 1400x400, 1920x1080, 1080x1920.

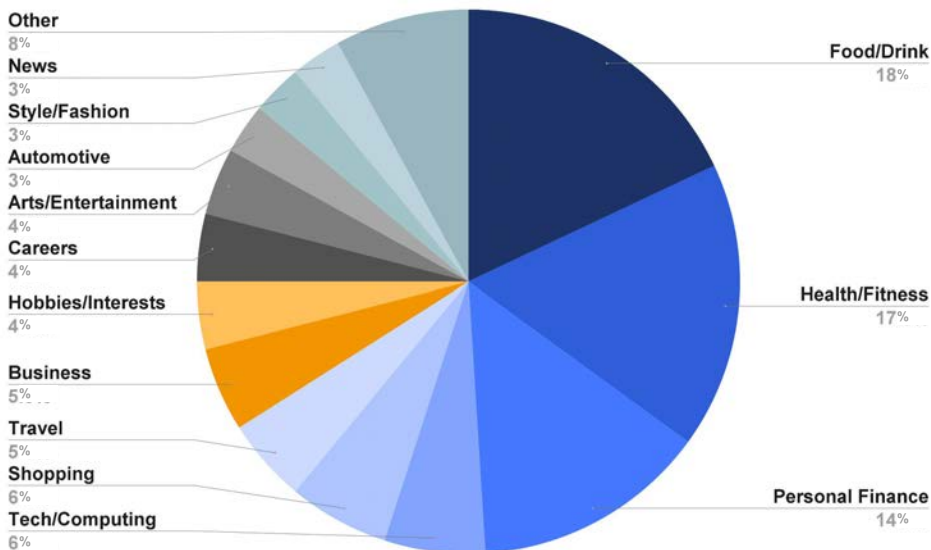
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Advertiser Category Trends

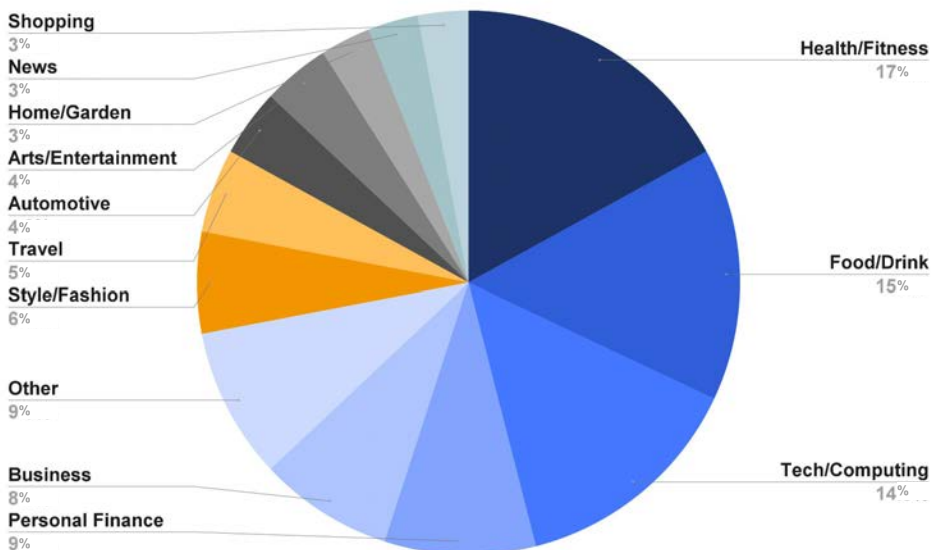
Top Spending Advertiser Categories

By IAB Categories

H2 2022



H1 2022




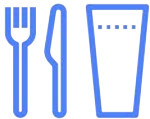




Comparing H2 2022 to H1 2022:

- The top 4 categories - Food/Drink, Health/Fitness, Personal Finance, and Tech/Computing - remained the same and accounted for 55% of spend in both periods.
- The Food/Drink and Personal Finance categories gained share among the top 4, while Tech/Computing declined from 14% to 6%.
- Health/Fitness maintained 17% share, sustained by strong pharma spending.
- In both periods, the remaining 45% of spend outside the top 4 categories was balanced across a broad array of categories.
- The Shopping category gained share in H2 2022, while Business and Style/Fashion saw declines in share.

Advertiser Categories with the Highest Growth*

H1 2022 to H2 2022

		Growth Rate
	Shopping	183%
	Personal Finance	144%
	Careers	123%
	Food/Drink	106%
	Arts/Entertainment	69%
	Health/Fitness	64%

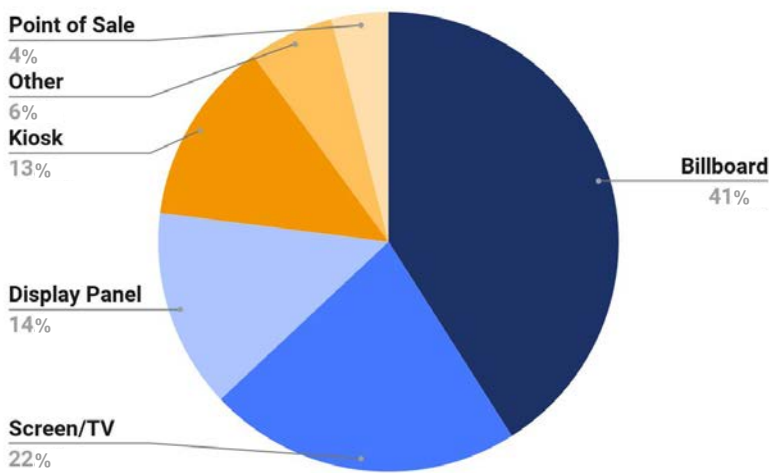
* Includes only categories that represented at least 2% of total spend in H1 2022.

3

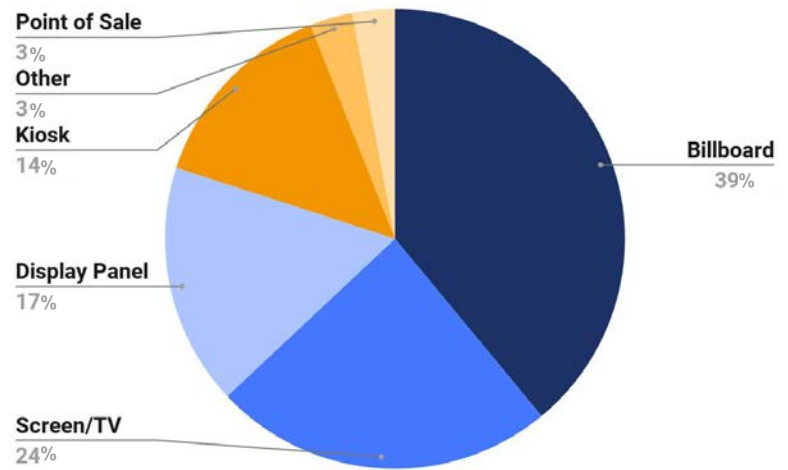
Asset Category and Pricing Trends

Spend Distribution by Asset Category

H1 2022



H2 2022



Asset Category Designations

Billboard

Large format, free standing, elevated digital displays.

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.

Point of Sale

Screens on a terminal or interface at which 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

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.

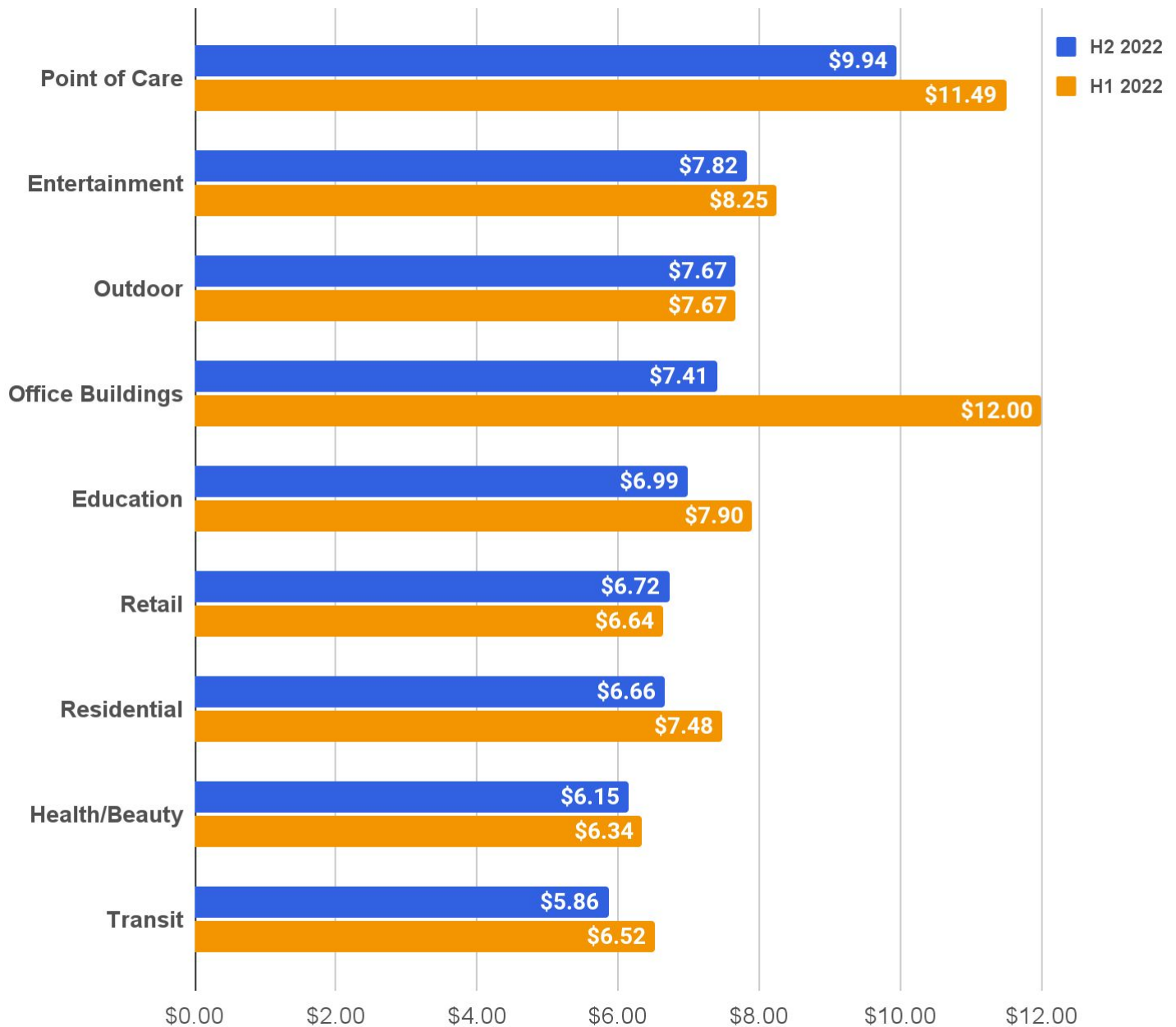
Vending Machine: An automated machine through which various goods may be purchased.

Billboards continue to represent the largest single asset category, at 39% of spend. Screens/TVs, Display Panels, and Kiosks all saw modest gains in share of spend.

From H1 2022 to H2 2022, overall programmatic screen count grew by 15%, driven by new screens in entertainment venues, health venues, office & residential buildings, retail locations, and transit hubs.

Average CPMs by Venue Category

By OpenOOH Venue Categories



Overall, the average CPM for H2 2022 was \$7.17, compared to \$7.46 for H1 2022.

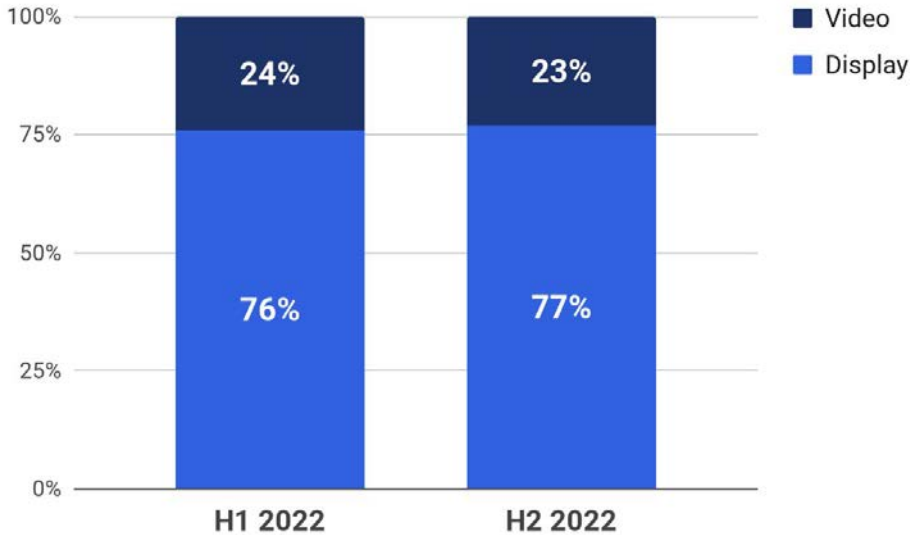
Average CPMs across most OpenOOH Venue Categories decreased slightly from H1 2022 to H2 2022, though larger declines were seen for Office Buildings and Point of Care screens.

4

Creative Format Trends

Display & Video Spending

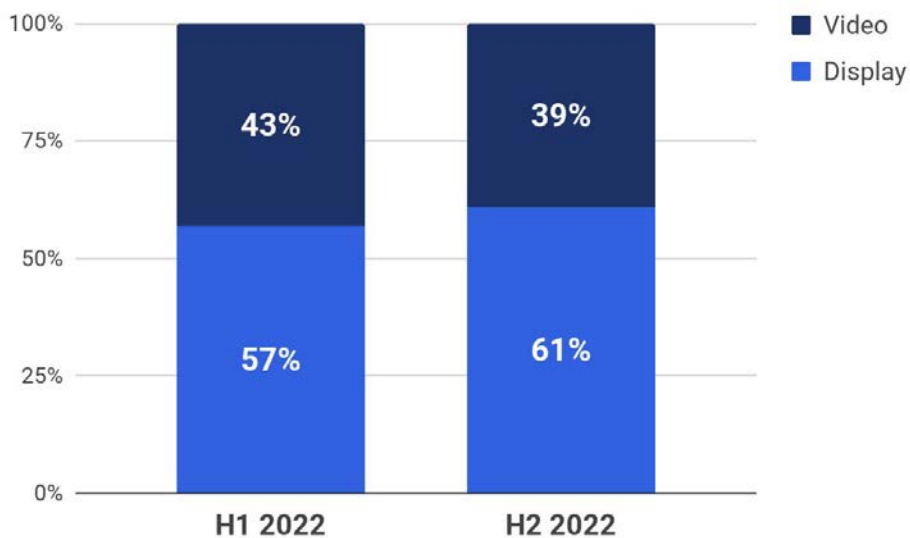
All Display & Video Spend



Programmatic Video OOH remains roughly a quarter of spend across all programmatic OOH screens.

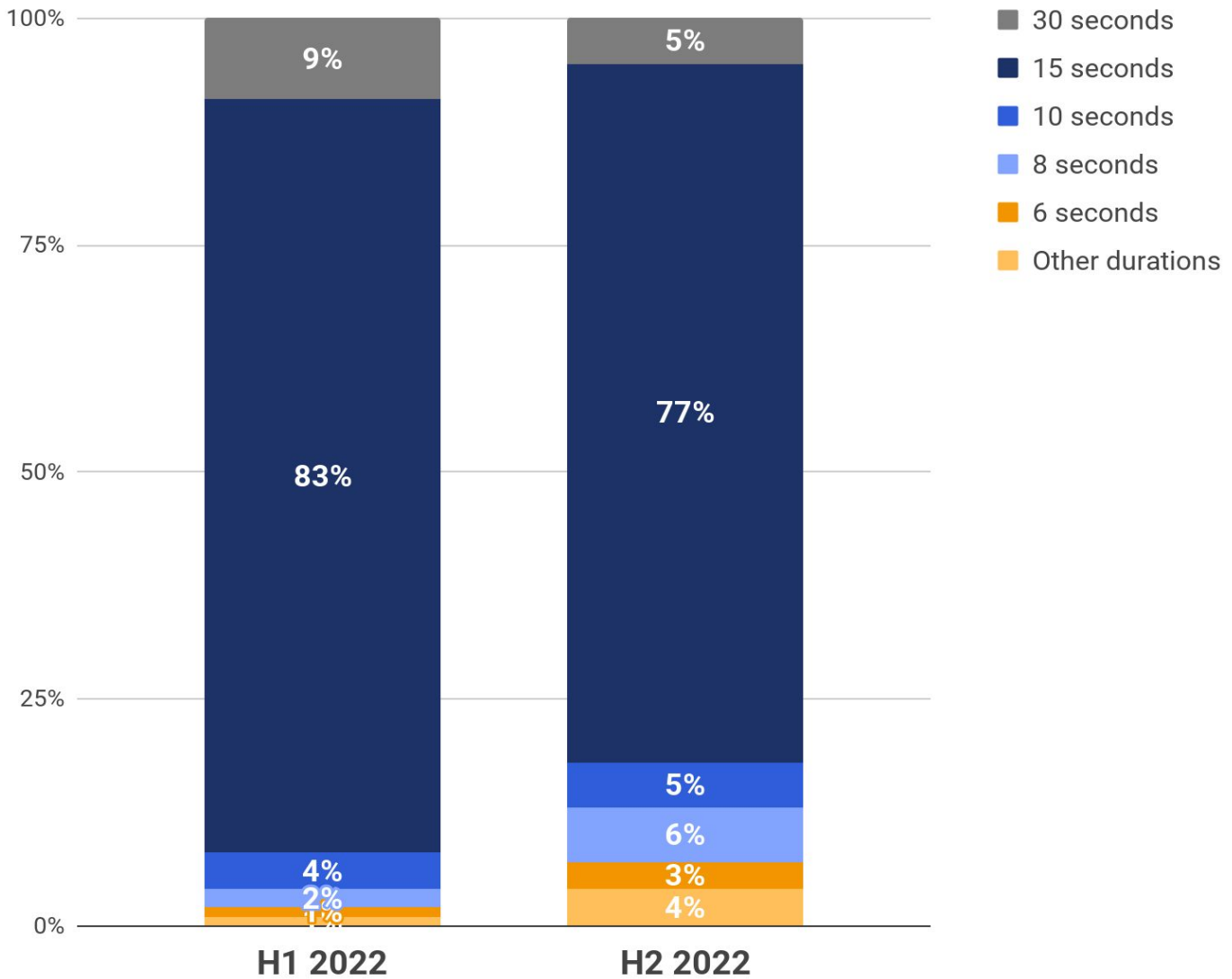
Display & Video Spend, ex-Billboards

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



Filtering the analysis to include only OOH screens that are video-enabled, **Video continues to account for about 40% of spend.**

Spend by Video Ad Duration



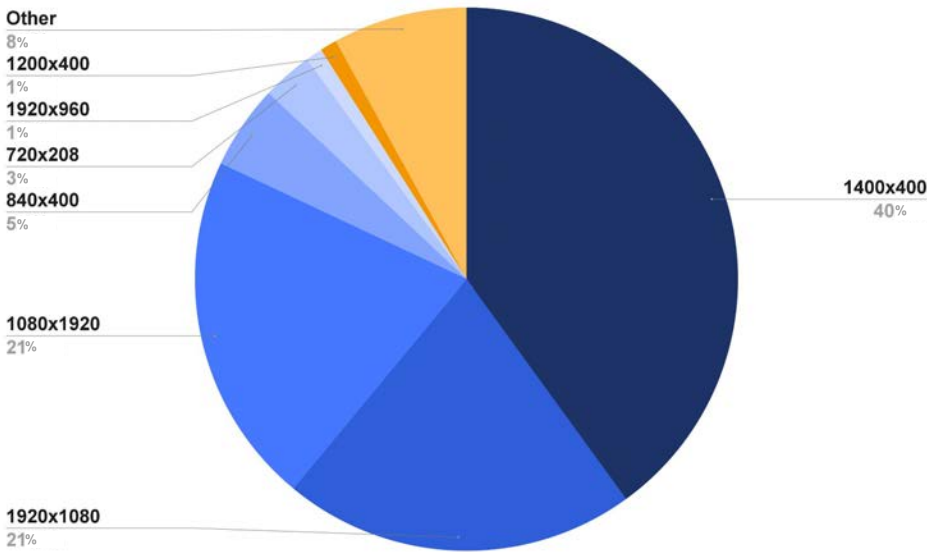
The most common video ad duration is 15 seconds, representing just over three fourths of all spend.

However, H2 2022, saw a material increase in shorter video ad durations, including 10, 8, and 6 second ads.

Spend by Display Size

Width x Height for static creatives

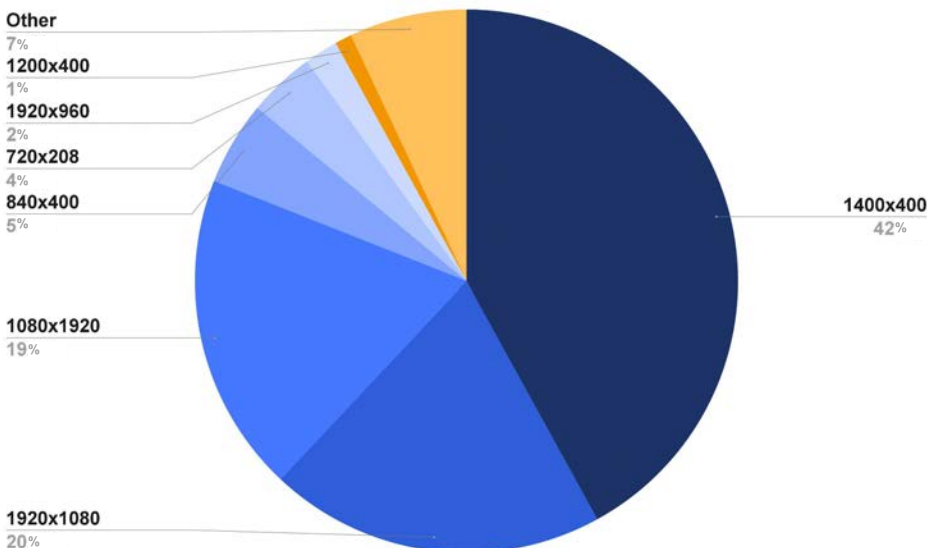
H2 2022



The top 3 sizes for static display creatives continue to account for just over 80% of programmatic OOH display spend, with the ranking and share of top sizes remaining steady from H1 2022 to H2 2022:

- 1400x400
- 1920x1080
- 1080x1920
- 840x400
- 720x208
- 1920x960
- 1200x400

H1 2022



About Place Exchange

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