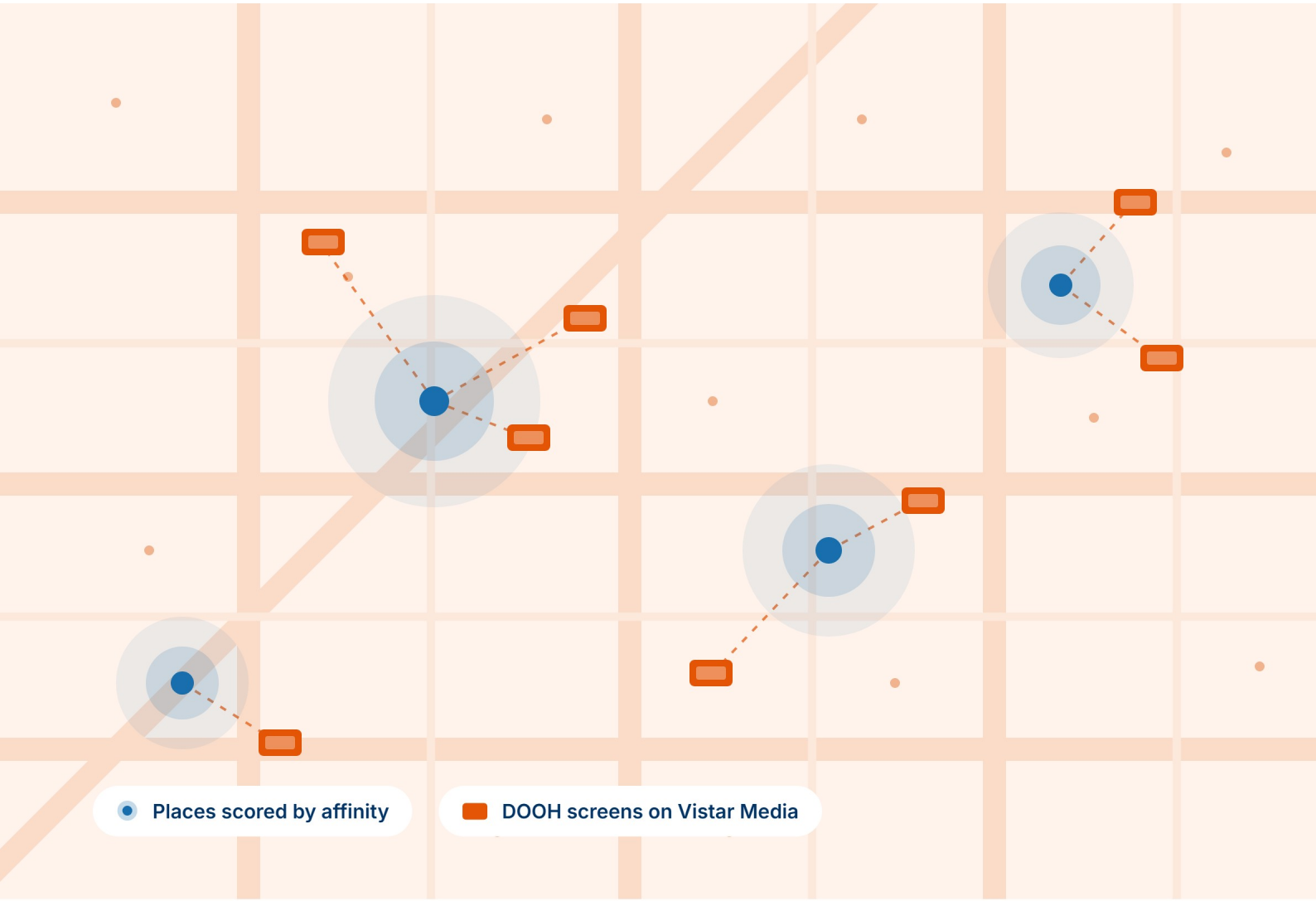
affinity answers

WHITEPAPER · NO. 1 · NOVEMBER 2026



DOOH & PDOOH IN EMEA

Location Becomes Audience

Geo-Spatial Affinity for digital out-of-home and programmatic DOOH across ten European markets

Audiences built on TrueAffinity data from Affinity Answers, activated programmatically through Vistar Media.

UK · DE · FR · ES · NL · BE · SE · NO · DK · FI

01 · EXECUTIVE SUMMARY

Digital out-of-home is about to become the majority of the world's outdoor media, and the way it is bought is changing faster than the way it is targeted.

$25.5bn
Global DOOH spend in 2025

49%
DOOH share of all OOH forecast for 2026, at $28bn

<10%
Share of DOOH traded programmatically, the fastest-growing slice

The constraint on pDOOH growth is not inventory or buying tools. It is audience data. Most DOOH targeting still relies on mobile device IDs observed near a screen, a signal that is shrinking under GDPR, consent frameworks and platform changes, and one that says where people were, not what they care about.

Geo-Spatial Affinity, built by Affinity Answers and activated through Vistar Media across 10 EMEA markets, takes a different route. It scores every screen by the interests and brand affinities of the people who frequent the places around it, using social engagement data and point-of-interest mapping rather than any device or personal identifier. Buyers choose an audience such as running enthusiasts, premium-beauty shoppers or football fans, and the platform delivers impressions on the screens and in the hours where that audience is most concentrated.

THIS PAPER, THE FIRST IN A SERIES, SETS OUT

p.3 Why the EMEA DOOH market is ready for a non-ID audience layer

p.5 How Geo-Spatial Affinity works, from social signal to screen

p.7 How agencies, brands and media owners can activate it today through Vistar Media

p.9 Where it fits under Europe's privacy rules

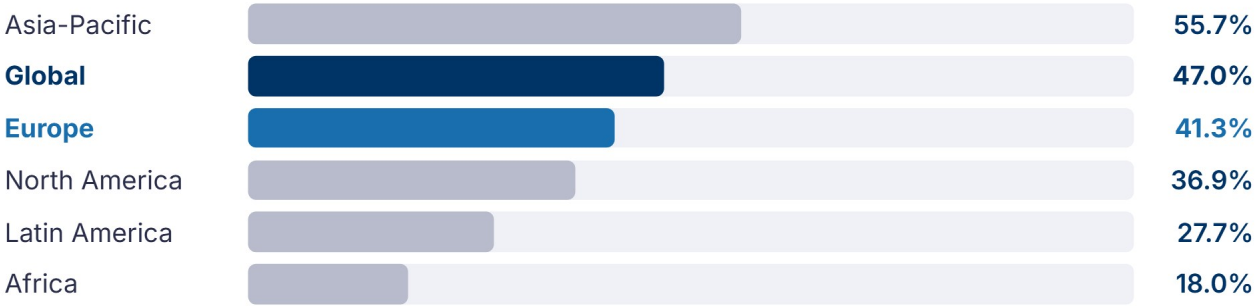
Source: World Out of Home Organisation, 2026 Global OOH Expenditure Report

02 · THE MARKET MOMENT

DOOH is now the growth engine of out-of-home everywhere, and Europe is one of its most digitised regions.

According to the World Out of Home Organisation, global OOH spend rose to $54.2bn in 2025, 5.1% of all advertising. Digital accounted for $25.5bn of it.

Digital share of OOH revenue by region, 2025 Global DOOH: $25.5bn



DOOH is forecast to reach $28bn and 49% of all OOH in 2026, overtaking static for the first time. Programmatic trading was 8.4% of DOOH ($2.1bn) in 2025.

Three of the world's ten largest OOH markets are in this partnership's footprint

UK
$1.85bn
OOH spend, 2025

GERMANY
$1.71bn
OOH spend, 2025

FRANCE
$1.47bn
OOH spend, 2025

UK DIGITAL SHARE
67%
of record £1.44bn, 69% in Q4

Programmatic is the next step, and it needs data

Programmatic DOOH is small but structurally favoured. It lets buyers plan OOH alongside display, video and CTV in the same platforms, with flexible flighting and audience logic. WOO's 8.4% programmatic share is likely understated, since many markets do not yet report it consistently; WOO has launched an audited SSP survey with PwC to fix this.

The pattern from online media is clear. Once inventory is bought programmatically, buyers expect to buy **audiences**, not just placements.

For DOOH, the quality of that audience layer will decide how much budget moves across from digital channels.

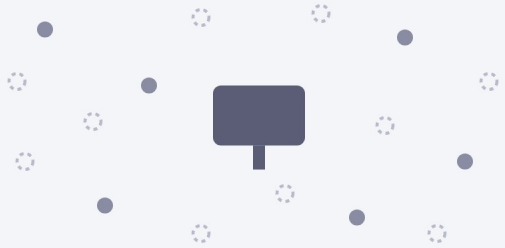
Sources: WOO Global OOH Expenditure Report 2026; Outsmart UK OOH revenue 2025

03 · THE PROBLEM

Proximity is not intent

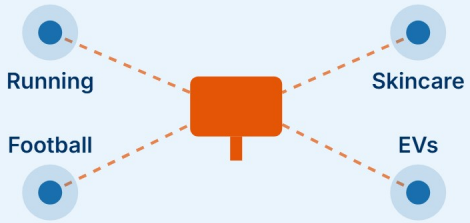
Knowing that people pass a screen tells you little about whether they will buy what it shows. Yet most DOOH audience targeting starts and ends with movement data.

WHAT DEVICE-ID DATA SEES



Who passed by. Only consented devices are visible; most of the crowd is not.

WHAT AFFINITY DATA SEES



What they care about. Every nearby place carries the interests of the people it draws.

The common approach observes mobile advertising IDs (MAIDs) near a screen, links them to segments, and scores the screen on who appears to pass. In EMEA, this model carries three growing weaknesses.

01

Shrinking signal

GDPR, the ePrivacy rules and consent management platforms mean only a fraction of devices can be observed with valid consent. Mobile OS changes have reduced it further. Panels built on that remnant skew toward whoever opts in.

02

Compliance exposure

Precise location data is treated as highly sensitive by European regulators. Buyers and media owners using it carry legal and reputational risk that procurement teams increasingly scrutinise.

03

Thin meaning

A device seen near a shopping centre says where someone was. It does not say whether they love trail running, follow luxury skincare brands or support a particular football club. Proximity predicts footfall, not preference.

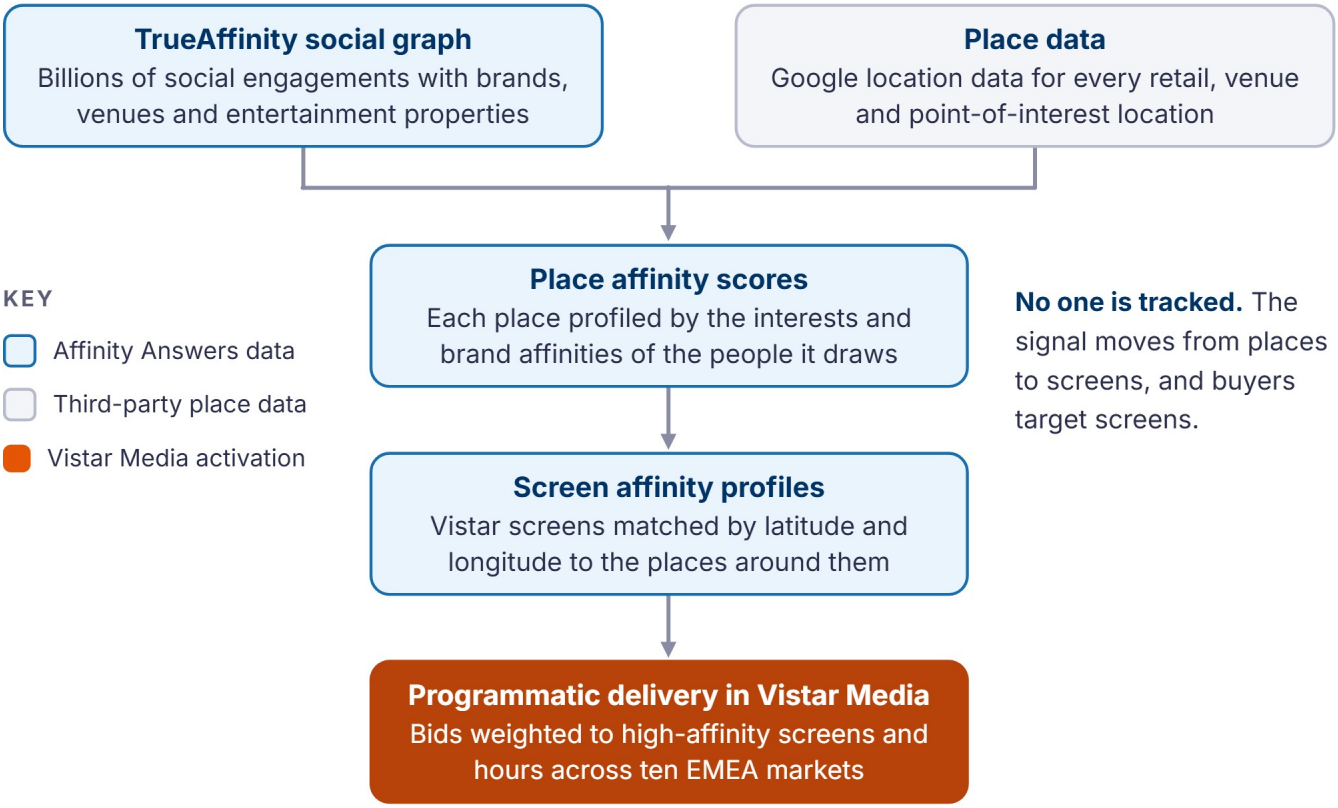
The result is a DOOH audience layer that is less precise than buyers expect from digital, harder to defend in privacy reviews and hard to align with the interest-based audiences used across the rest of a campaign.

DOOH needs an audience signal that is rich in intent, built for scale across markets and free of personal identifiers.

04 · HOW IT WORKS

How Geo-Spatial Affinity works

Proximity alone doesn't predict purchase; affinity does. Geo-Spatial Affinity learns the interest profile of neighbourhoods, stores, venues and anything else with an address, then carries that profile to the DOOH screens around them.



No one is tracked. The signal moves from places to screens, and buyers target screens.

The ingredients

TrueAffinity

For 15 years Affinity Answers has built the largest proprietary study of how people relate to brands, venues, entertainment properties and personalities. It captures engagement across Facebook, Instagram, X, Reddit, TikTok and YouTube, verified against browsing, ecommerce, search and mobile behaviour. Affinity Answers reports that these audiences outperform purchase-based data by 55%.

Place data

Google location data maps every retail store, venue and point of interest, so each can carry an affinity profile just as a cookie or device ID once carried an individual's.

Screen locations

Each Vistar screen's publisher-supplied latitude and longitude links it to the places around it, giving every screen an affinity score for every audience.

05 · HOW IT COMPARES

Places, not people

Geo-Spatial Affinity replaces the device as the unit of targeting with the place, and that changes what a buyer learns about every screen.

	DEVICE-ID LOCATION TARGETING	GEO-SPATIAL AFFINITY
Core signal	Devices observed near a screen	Interests and brand affinities of places near a screen
What it tells a buyer	Who passed by	What the people around this screen care about
Personal data used	Mobile advertising IDs, precise location	**None**
Scale in EMEA	Limited to consented devices	Every screen with a known location
Fit with other channels	Separate DOOH-only segments	Same affinity audiences as display, video and CTV

LIVE TODAY

Live in ten European markets

Geo-Spatial Affinity audiences are live in Vistar Media's platform in ten European markets. Vistar has built the integration on its side so the audiences behave like any other targeting option, with no new workflow for buyers.

UK United Kingdom	**DE** Germany	**FR** France	**ES** Spain	**NL** Netherlands
BE Belgium	**SE** Sweden	**NO** Norway	**DK** Denmark	**FI** Finland

06 · ACTIVATION

Activation with Vistar Media across EMEA

vistar media
part of T-Mobile Advertising Solutions

For agencies and brands

1 Plan

Choose from 360+ standard affinity audiences, or request a custom audience built around a brand, competitor set, venue type or cultural property. Each audience comes with its ingredients and insight profile so planners can see what it represents.

2 Buy

Apply the audience in Vistar's DSP or through programmatic deals. Delivery is weighted toward high-affinity screens and the hours when they matter most.

3 Tune

Use additional filters to target specific venues or media owners. Built-in alerts flag when a filter would restrict scale too far for the campaign goal.

4 Extend

Use the same affinity audience in display, video and CTV, so DOOH carries the same audience definition as the rest of the plan.

For media owners

Geo-Spatial Affinity gives every screen on Vistar's exchange a richer, privacy-safe audience profile without any additional sensors or data collection at the site. Screens in high-affinity locations can be packaged and priced around the audiences they serve, which supports yield on inventory that movement data alone undervalues.

From brief to delivery

STEP 1
Audience selection
Pick a standard or custom affinity audience
Planner

STEP 2
Screen scoring
Screens ranked by affinity of nearby places
Affinity Answers

STEP 3
Deal setup
Audience applied in DSP or via deal ID
Vistar / buyer

STEP 4
Delivery
Bids weighted to high-affinity screens and hours
Vistar

STEP 5
Reporting
Standard Vistar delivery and campaign reporting
Vistar

07 · USE CASES

Use cases by vertical

The approach works wherever a brand's audience gathers around identifiable places, which covers most consumer categories. The examples below illustrate how buyers can apply it.

Retail & FMCG

EXAMPLE AUDIENCE

Shoppers with affinity for a competitor grocery chain

Weights delivery to screens near and en route to competitor stores, ahead of a promotion

Beauty & luxury

EXAMPLE AUDIENCE

Followers of premium skincare and fashion houses

Prioritises screens in districts dense with high-affinity boutiques and department stores

Sports & apparel

EXAMPLE AUDIENCE

Running and fitness enthusiasts

Targets screens near gyms, parks and specialist sports retail during morning and evening peaks

Entertainment & music

EXAMPLE AUDIENCE

Fans of a touring artist or genre

Lights up screens around venues, record shops and nightlife districts before ticket on-sale

Automotive

EXAMPLE AUDIENCE

Interest in electric vehicles and specific marques

Focuses on screens near dealerships, charging hubs and premium retail parks

Travel & QSR

EXAMPLE AUDIENCE

Frequent travellers; fans of a fast-food brand

Uses airport, rail and roadside screens near high-affinity venues and travel hubs

Making DOOH accountable

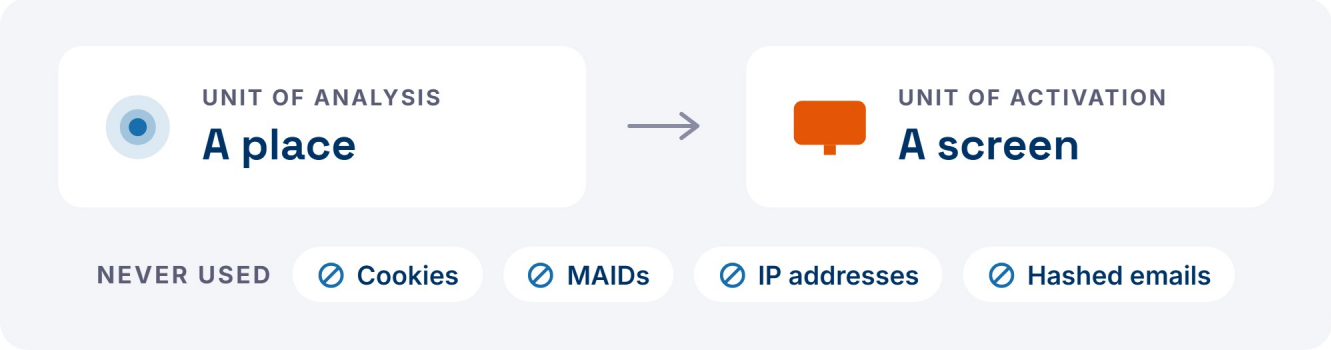
Because the audience is the same one used in other channels, DOOH can be judged on the same terms. Buyers can compare affinity-weighted DOOH with untargeted delivery, or with the same audience in online channels, using brand lift, search lift or footfall studies run with Vistar's measurement partners.

Brand lift | Search lift | Footfall

08 · PRIVACY

Built for Europe's privacy rules

Geo-Spatial Affinity never identifies, tracks or targets an individual, at any step. Its unit of analysis is a place, and its unit of activation is a screen.



No device or personal IDs

No cookies, MAIDs, IP addresses or hashed emails are used to build or deliver audiences.

No precise location tracking of people

Location enters only as public point-of-interest data and the publisher-supplied latitude and longitude of each screen.

Aggregated affinity

Social engagement data is analysed at the level of brands, venues and properties, not personal profiles.

Independently certified

Affinity Answers' data is independently certified for transparency, privacy and quality.

For buyers this simplifies privacy and procurement reviews, which increasingly flag location-based targeting. For media owners it adds an audience layer to inventory without new consent requirements at the site. It also holds steady as ID-based signals continue to decline, so planning assumptions made today stay valid.

Note: this section describes the product design and is not legal advice. Buyers should confirm fit with their own data protection teams.

09 · GETTING STARTED

DOOH is crossing into the majority of outdoor media just as ID-based targeting weakens; the buyers who move audience strategy onto affinity first will set the benchmarks others are measured against.

YOU ARE

Agency or trading desk

Interest-based DOOH audiences that match the rest of the plan, without ID risk

First step
Ask your Vistar contact to add a Geo-Spatial Affinity audience to your next EMEA brief

YOU ARE

Brand

Screens and hours chosen for the people who care about your category

First step
Request a custom audience built around your brand or competitor set

YOU ARE

Media owner / SSP

A richer audience profile for every screen, with no site-level data collection

First step
Talk to Vistar and Affinity Answers about packaging high-affinity inventory

To see audience insights for your category or request a custom build, contact either partner.

vistar media
part of T-Mobile Advertising Solutions
Programmatic DOOH activation
info@vistarmedia.com
vistarmedia.com

affinity answers
TrueAffinity audience data
cs@affinityanswers.com
affinityanswers.com

COMING NEXT IN THIS SERIES A closer look at how affinity scores are built for a venue, followed by early campaign results from EMEA launches.

SOURCES

World Out of Home Organisation, 2026 Global OOH Expenditure Report, via Billboard Insider (July 2026).
Outsmart, UK OOH revenue 2025 (February 2026).
Affinity Answers and Vistar Media, Geo-Spatial Affinity product materials (2026).