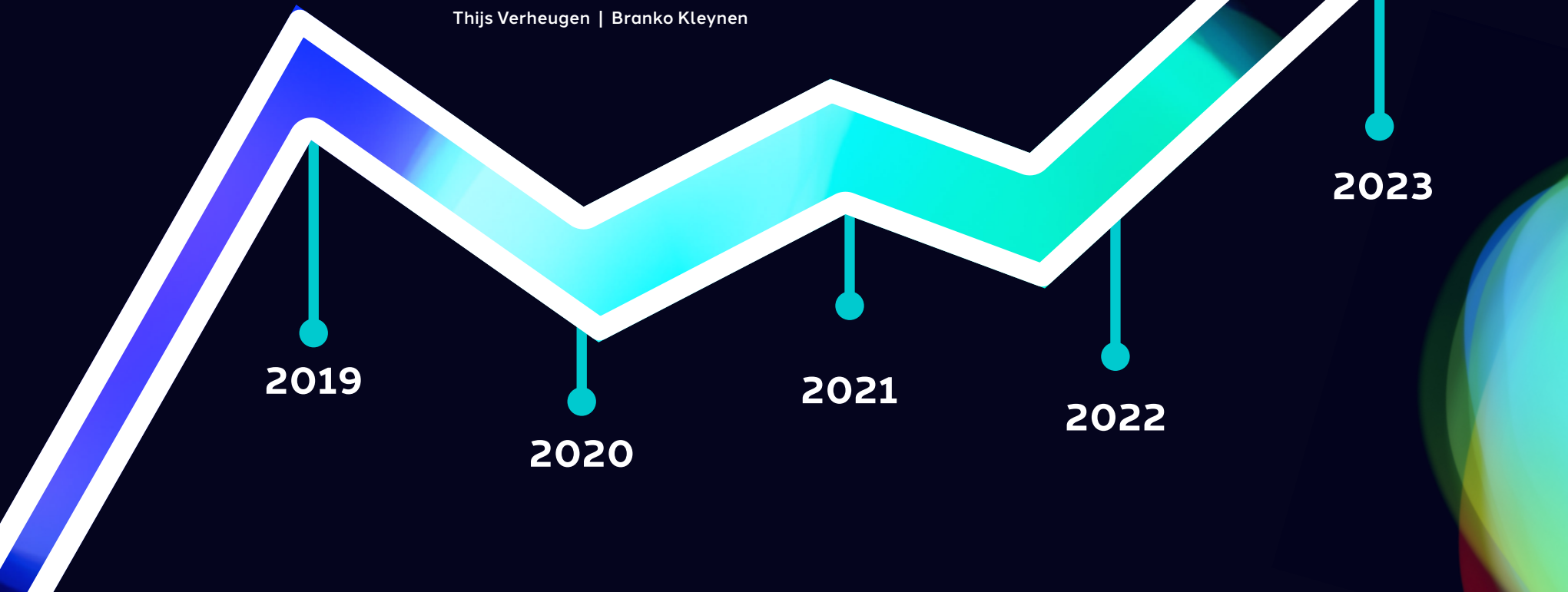


22-23 dentsu ON TREND OOH

Thijs Verheugen | Branko Kleynen



“OOH offers big,
iconic & powerful
storytelling at a
more flexible scale
than ever before
providing lasting
impressions.”

Hélène Bairiot
OOH Director
Dentsu Benelux



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OOH NEVER LOOKED SO LIVELY!

Most of us have noticed throughout the last couple of (Covid) years that being outside is special and that when we can't go outdoors, we miss it enormously. Fortunately, we're no longer talking about lockdowns. We're free to enjoy life outdoors again and make memorable multi-sensorial memories.

Add to this that, according to the Harris Poll survey of November 2021, no less than **63% of people experience some form of digital burnout**, which makes sense after almost two years of virtual birthdays, online yoga sessions and Zoom meetings. As a result, **35%** of the people surveyed plan to spend substantially **less time behind their screens**.

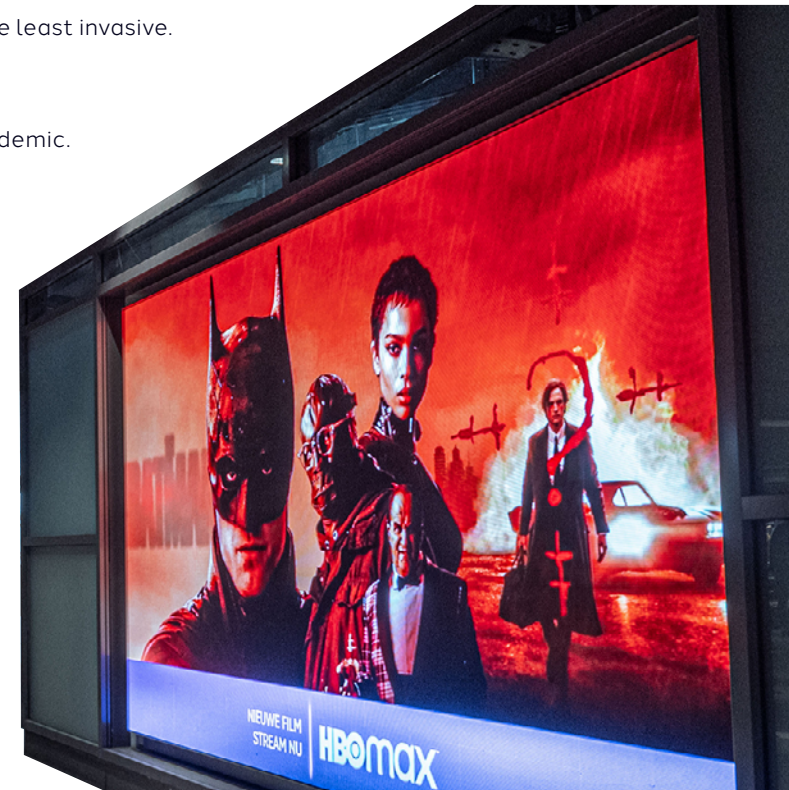
These reasons ensure that (D)OOH, digital out of home, could become **the medium of choice in 2023** because out-of-home advertising is at the centre of our society. It fascinates consumers from time immemorial, is increasingly compatible with virtual channels and is experienced by citizens as the least invasive.

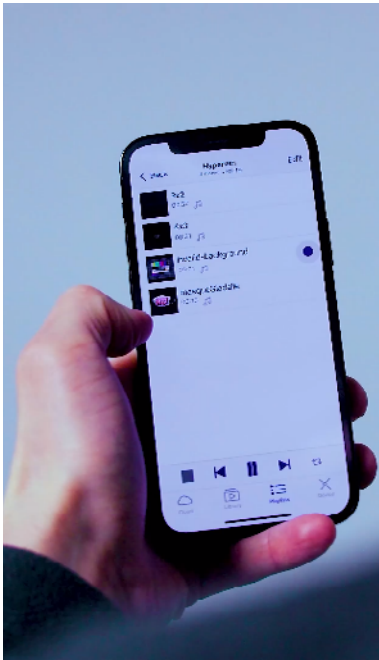
58% of respondents feel that (D)OOH is the most reliable medium.

62% of interviewees feel that (D)OOH is more visible now than before the pandemic.

70% of consumers have a high appreciation for (D)OOH.

(In the coming year, the following trends will strongly influence (D)OOH: **'More than screens'**, **'Welcome to the Metaverse'**, **'The most social medium'**, **'(D)OOH omnichannel planning'**, **'From global to local'** and **'A new way of experiencing'**. That is why we would like to explain them in this trend report.





MORE THAN SCREENS

Digital technologies are becoming increasingly integrated within (D)OOH. They serve as a **springboard to innovative interactive, and unexpected experiences**. Holographic projections, 3D technologies, drone shows, AI and dynamic content are just a few examples that rejuvenate creativity within (D)OOH.

Unexpected experiences resonate with consumers and attract more attention by thinking outside the traditional static posters. Balenciaga and Fortnite's collaboration with 3D (D)OOH is an excellent example of a unique (D)OOH experience that allowed the clothing brand to rejuvenate. By using beloved Fortnite skins such as 'Doggo' in their campaign communications, they show how influencer marketing can work in (D)OOH to reach a hard-to-reach audience.

We predict that in upcoming years brands will create multi-sensory campaigns for the digitally tired consumer who craves real-life experiences. A great example is Gucci's 100th-anniversary celebration with a (temporary) multi-sensory hub in the heart of London with a bookstore, music lounge, café and, of course, a boutique with fashionable items. Just like Netflix's compelling activations for the launch of the new season of 'Bridgerton' and 'Money Heist'.

47% of consumers are trying to be more outdoors and less glued to their screens at home. They want to disconnect from the digital and immerse themselves in physical experiences.



WELCOME TO THE METAVERSE

Our physical world has often seemed constrained, especially during the tumultuous Covid times. Still, at the same time, for many, the digital world has grown enormously through the **intertwining of physical, digital and virtual reality**. In other words, offering experiences in a digital universe. We call this place the metaverse.

The growth of these virtual worlds has led to a **redefinition of (D)OOH and its touchpoints**. By incorporating the metaverse in our plans and allowing OOH to help shape the metaverse advertisement scene, we can create a powerful medium with all the top selling points of OOH and digital ad spaces. One example is the exclusive concert by Ariana Grande in the popular game Fortnite. In December of 2021, Ocean Outdoor, a prominent player within the OOH market, announced a partnership with Admix to bring (D)OOH to the metaverse. The partnership will **showcase digital replicas of customised iconic DOOH locations** and synchronise ads in the physical world to the virtual world.

At dentsu, we are also building on the metaverse by creating interactive AIs that move within this universe, among other things. For example, Rumi has just been launched by the dentsu Creative lab; she serves as a digital personification of a brand.

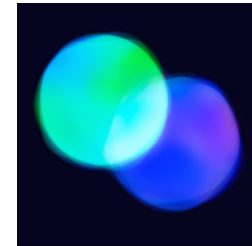




THE MOST SOCIAL MEDIUM

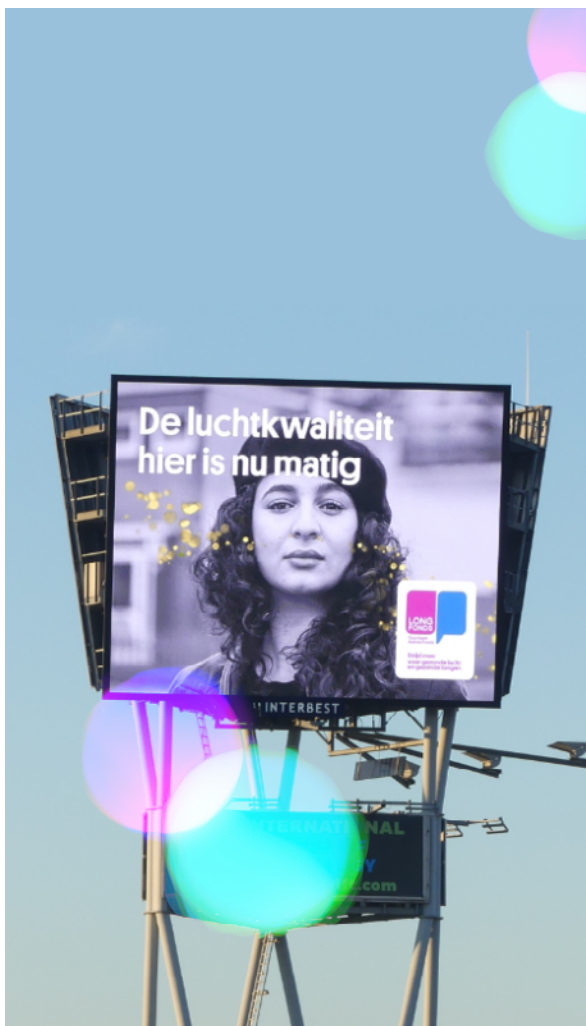
The increasing demand for sustainability creates a need for brands to become more vocal about their social identity. Making, naturally, wanting to communicate to consumers: “how they help improve the planet or certain communities” — broadcasting this message through different media will become the norm. It will no longer be on just some obscure, hard-to-find webpage on the brand’s website. **Outdoor advertising will play a pivotal role for brands in obtaining and maintaining this social identity.**

(D)OOH is placed in public spaces, is part of everyday life and is experienced as the most reliable medium. This makes (D)OOH suitable for showing social messages to the local communities. Brands that use the (D)OOH stage for their social messaging are visible to the community, creating the obvious obligation to live up to this statement. By devising concrete social projects with genuine people in the real world, brands increase their social capital and brand standing.



Not many brands will dare to go public with a false sustainability promise and staged expressions in which models perform a play. This scheme will not enamour the consumer. (D)OOH is, therefore, an excellent tool for dedicated and sustainable brands to distinguish themselves visibly & emotionally from brands that do not fulfil their social promises and fall under the category of greenwashing.

Unlike other media, (D)OOH goes one step further by physically contributing to a better world. Meanwhile, billboards provide people in the desert with water, purify the air around construction sites and busy traffic routes in cities, digital screens show tourists the way around the city and sedum roofs of bus shelters with flowers and herbs help bees. The growing social significance of outdoor advertising objects will contribute to the desired social identity of brands and will therefore be increasingly used for sustainable campaigns like for example O2’s Go Green campaign.



(D)OOH OMNICHANNEL PLANNING

The world's oldest medium is about to get a facelift. **Investment in digitisation, an explosion in location data, the consolidation of media owners and the demand for uniformity/ accessibility have laid the groundwork for (D)OOH to connect with the digital ad ecosystem..**

This makes the medium more accessible to brands and omnichannel planners, which helps continue the strong growth of (D)OOH. The ability to use location data to automate buying, the use of triggers* to influence the buying process, and the use of adaptable creatives to optimise relevance are reasons why PDOOH, programmatic digital out of home, will continue to be one of the fastest-growing media channels. As programmatic pipelines are established, and connections extend beyond the (D)OOH community, omnichannel planning for (D)OOH will be a key driver of this growth.

From sustainable brand messages triggered by pollution levels; (Longfonds digital mast campaign) to locally activated (D)OOH based on visitor data; (C&A case) to recommendations on the type of transport based on weather data; data and programmatic DOOH technologies are challenging brands to apply the creative possibilities of (D)OOH.

Triggers* We use these to either activate certain parts of the programmatic campaign or by setting certain conditions we can also automatically change the creative. Take the weather as an example, imagine your a brand selling umbrella's and parasols. When the sun is shining and it's hot outside you'd want to show your parasols. But when it's raining or looking gloomy outside, umbrella's should be shown. By using triggers this can be arranged.



FROM GLOBAL TO LOCAL

For most, the covid-19 pandemic downsized our world. Everything became more valued, more rudimentary and much more local when it comes to work, grocery shopping, sports, and recreation. As a society, we are clearly moving differently, more locally within our own communities, connecting with people more than before, and this will continue. Add to that the growing number of conscious consumers who want to reduce their carbon footprint, resulting in the local economy becoming increasingly important. The local economy not only takes better care of the planet - it reinvests in local communities, creates local jobs and offers products that better meet local needs.

We can say with absolute certainty that it is vital for brands to focus on local communication and activity. This, too, in the case of (D)OOH deployment. Brands that become 'hyper-relevant' locally will reap the benefits.

This development has accelerated the need to better understand & integrate behaviour and movement patterns within (D)OOH plans. For instance, location data was analysed and incorporated with current mobile data, allowing us to track/expect specific demographic movements of consumers and integrate them into location-based (D)OOH plans.

Steun Horeca



Heineken Horeca





A NEW WAY OF EXPERIENCING

We have known for some time that consumers perceive OOH as a **positive medium**.

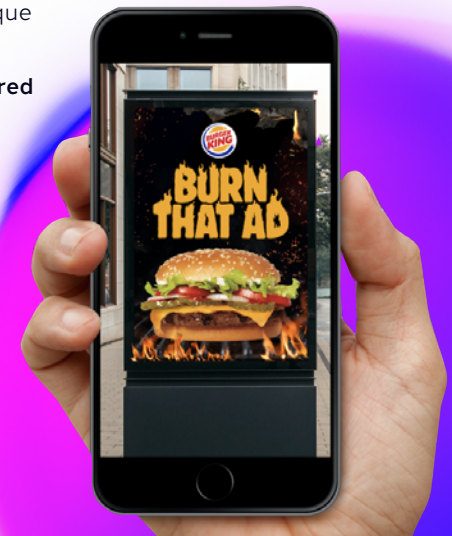
As the least invasive communication form, OOH is top of mind with consumers. As a medium, OOH is extremely capable of increasing brand & campaign recall. Approximately 27% of the addressed audience **remembers the story behind a campaign after seeing OOH ads**.

Not only do consumers remember the campaign, but **66% of consumers perform an action on their phone after seeing an OOH ad**. This includes sharing the campaign online or visiting the advertiser's website (45% of action takers). Of course, they could also look up more information about the advertiser (39%) or decide to purchase the actual product (39%). The Harrison Poll shows that 28% of respondents have downloaded an app after seeing an OOH ad. This percentage increases significantly when looking at different generations. Among Gen-z this increases to 46% and 38% among Millennials.



Mobile interactions can also take place with the OOH creative. Think dynamic content, XR (extended reality) and AR (augmented reality). We predict that in the next few years, these will appear more regularly in the world of advertising. Again, it's all about the experience. Think, for example, of Instagram filters connected to brand messages, Snapchat AR, bootcamp QR codes and interactive screens.

As advertisers, we want to offer consumers fun, unique and memorable moments. **As a rule of thumb, the more unique the experience, the faster it will be shared online.** Knowing that 91% of Gen Z'ers share OOH campaigns online when they think the creative or brand is cool, with friends or family. We can use smart technologies to go that extra mile and put a smile on their faces.



MULTI-CONTEXT CAMPAIGNS, ARE EASY!

Out-of-home can seem worlds apart from other media types, unsurprisingly, if you look at all the different touchpoints 'OOH' encompasses. **Metro & train stations, retail, shopping malls, street environments, highways, gyms, parks, and so many more touchpoints, showcase the diversity within this medium.** It doesn't even include the differentiating sizes, specs and other contextual characteristics each frame offers. Many factors contribute to a frame's suitability for the campaign.

As we said earlier in this report, OOH went through rounds of digitalisation, which opened up new creative and strategic avenues. Especially the **increased flexibility in planning offered by PDOOH and the ability to combine different touchpoints** easily permits us to optimise audience delivery like never before.

Media owners invested sector-wide in personalised tools that allow for flexible planning and purchasing of the best context combinations. This increase in accessible planning also coincides with the growth of multi-context campaigns.

JC Decaux says that multi-context campaigns are becoming the norm in (D)OOH. The emergence of digital screens within all the different environments out-of-home operates in also **ushers us into a future where there's no stopgap between delivery and the live campaign, which could increase the relevance of creatives.**

It's possible to obtain effective reach while remaining relevant and efficient, especially when buying multi-contextual campaigns. There's a great synergy between programmatic buying and audience-connected location data. Adsquare, for example, is a service that allows us to reach a particular target group according to their travel habits — increasing the visibility of the communication significantly for the audience. OOH has never been so close to the consumer. OOH is everywhere!



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MEDIA PROVIDED

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