

# HOW BRANDS CAN SEIZE THE MOMENT WITH OUT OF HOME ADVERTISING

OUTFRONT/



CLICK TO JUMP TO SECTION

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## Media Trends

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- Brand activations, podcasts, and gamification offer brands opportunities to connect with consumers



## Out of Home Trends

- OOH is best liked, most trusted, most noticed, best recalled ad medium
- Full-funnel buyer's journey impact as well as customer retention and loyalty
- The most activation, digital or otherwise
- Lowest CPMs in advertising
- 3D billboards, data-driven dynamic creative, and AR change the game
- Measurement and attribution continue to advance
- Only traditional media seeing growth





# CONSUMER TRENDS

MID 2024 - ADVERTISING TRENDS REPORT



## CONSUMER TRENDS

# Economic indicators improve, **but consumer confidence lags.**

**Retail sales are projected to grow by at least 2.5%<sup>1</sup> and GDP by 2.4%, with inflation expected to slow to 2.1%<sup>2</sup>. Yet only 28% of Americans rate the economy as excellent or good.**

**Among the 72% rating economic conditions as fair or poor:**

- 28% cite high inflation
- 21% cite high cost of living
- 15% cite low wages/lack of good-paying jobs<sup>3</sup>

**While consumer sentiment in March was the highest since July 2021, inflation expectations are on the rise.**

- Full-year inflation expectations highest in four months
- Five-year inflation outlook highest in six months<sup>4</sup>
- 74% in swing states say inflation is going in the wrong direction<sup>5</sup>

SOURCES: 1. [NRE](#), MARCH 2024; 2. [FEDERAL RESERVE BANK](#), APRIL 2024; 3. [PEW RESEARCH CENTER](#), MARCH 2024; 4. [UNIVERSITY OF MICHIGAN](#), APRIL 2024; 5. [WALL STREET JOURNAL](#), APRIL 4, 2024





## CONSUMER TRENDS

# Inflation across core sectors remains at top of consumer minds.

Americans' top three economic concerns are household costs<sup>1</sup>.



Food & consumer goods

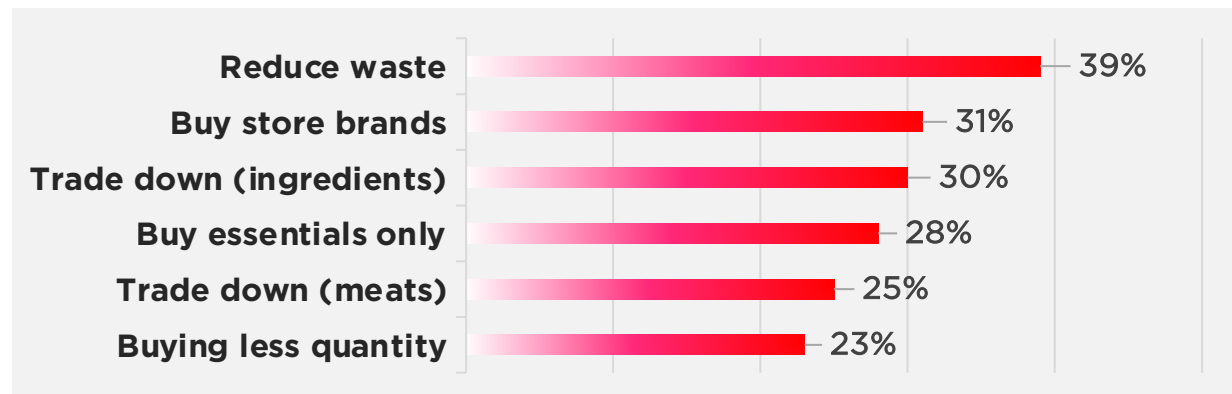


Housing



Gasoline & energy

**64% expect groceries to be more expensive next month.**  
**Advertisers must take into account the adjustments those consumers are making in response<sup>2</sup>.**





## CONSUMER TRENDS

# Saving money notwithstanding, consumers deserve a little treat.

More than 4 in 5 consumers treated themselves to a splurge in March, spending an average of \$40.

Top drivers of joy purchases:



Comforting



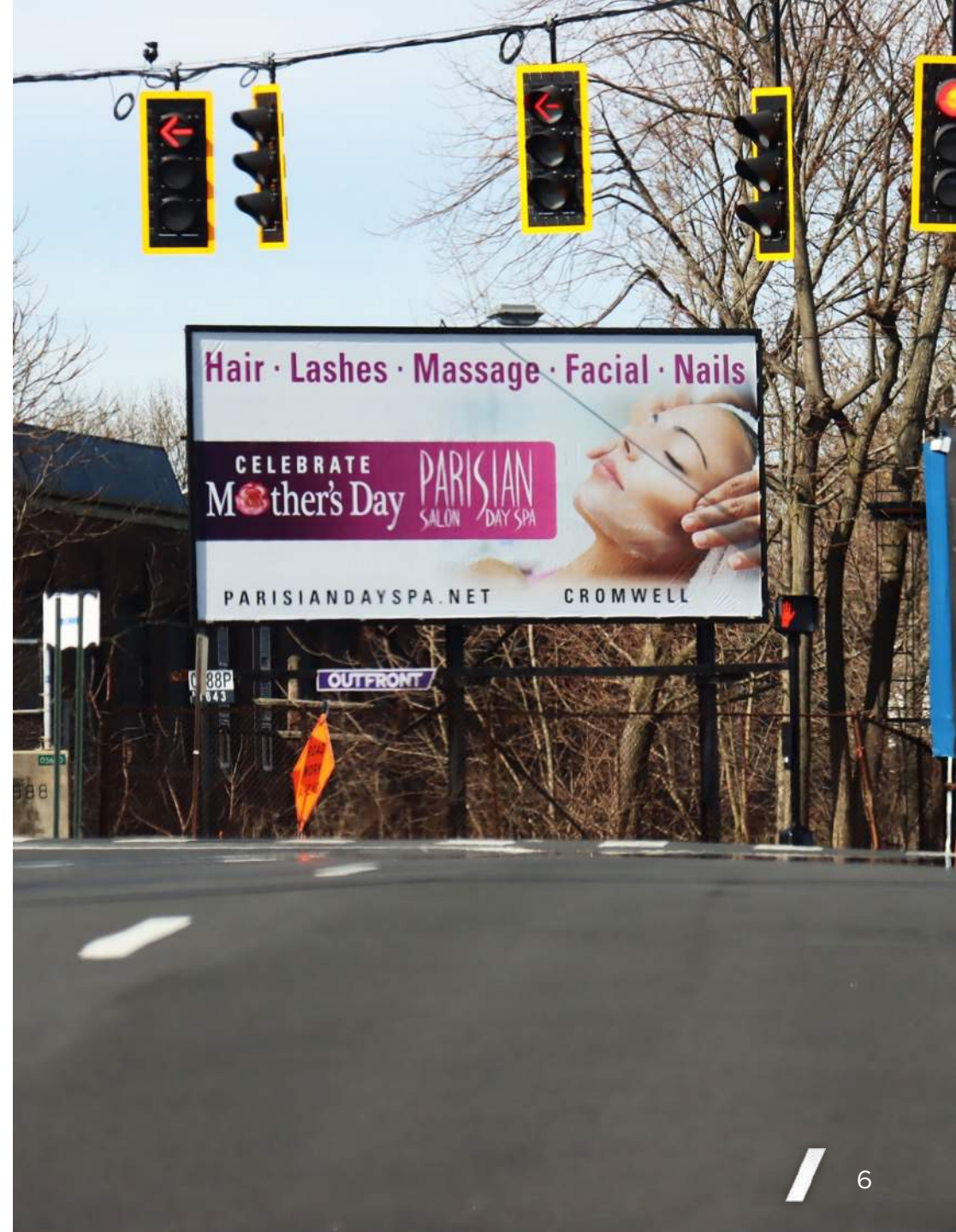
Relaxing



Practical

Top categories of splurge purchases:

- Food & beverage (44%)
- Clothing & accessories (18%)
- Personal care (12%)
- Electronics (7%)
- Health & wellness (5%)
- Toys & hobbies (5%)





## CONSUMER TRENDS

# While trading down, consumers still prioritize experience spend.

**Americans are tightening belts across the board. But more than half of all Americans now prioritize spending on experiences over physical goods<sup>1</sup> and are less likely to trade down on those purchases.**

### Categories where trade-downs outpaced splurges most:

- Groceries (-26%)
- Electronics (-18%)
- Household necessities (-18%)
- Home décor (-17%)
- Luxury goods (-16%)

### Categories where trade-downs outpaced splurges least<sup>2</sup>:

- Travel (-3%)
- Dining out (-5%)
- Events (-7%)

SOURCES: 1. [PAYSAFE](#), DECEMBER 2023. 2. [DENTSU](#), MARCH 2024





## CONSUMER TRENDS

# Traveling, movies, concerts: it's all about the experience.

**Travel:** 92% plan to travel the same or more than they did in 2023<sup>1</sup>, a year that saw a **record-breaking \$2,830 average vacation cost** and a total of \$214B spent on summer trips<sup>2</sup>.

**Concerts:** 2023 was **Live Nation's biggest year ever**, selling 620MM tickets (+13% YOY) and pushing total ticket revenue to \$23.3B<sup>3</sup>. (A full billion dollars of that was just Taylor Swift<sup>4</sup>.)

**Movies:** Hooray for Hollywood, its \$9B in total domestic box office<sup>5</sup>, and the **Barbenheimer** phenomenon collectively selling almost \$2.4B in tickets worldwide<sup>6</sup>. The memeworthy double feature drove AMC Theatres, the world's largest theater chain, to the largest single week of admission revenue in the company's 125-year history.

SCAN OR CLICK TO  
LEARN HOW BRANDS  
CAN BECOME PART OF  
THE EXPERIENCE



SOURCES: 1. [FORBES ADVISOR](#), JANUARY 2024; 2. [ALLIANZ](#), SUMMER 2023; 3. [LIVE NATION](#), FEBRUARY 2024; 4. [POLLSTAR](#), DECEMBER 2023; 5. [COMSCORE](#), JANUARY 2024; 6. [BOX OFFICE MOJO](#), JANUARY 2024



## CONSUMER TRENDS

# Nostalgia hits feels and lifts sales, **but consumers are still craving originality.**

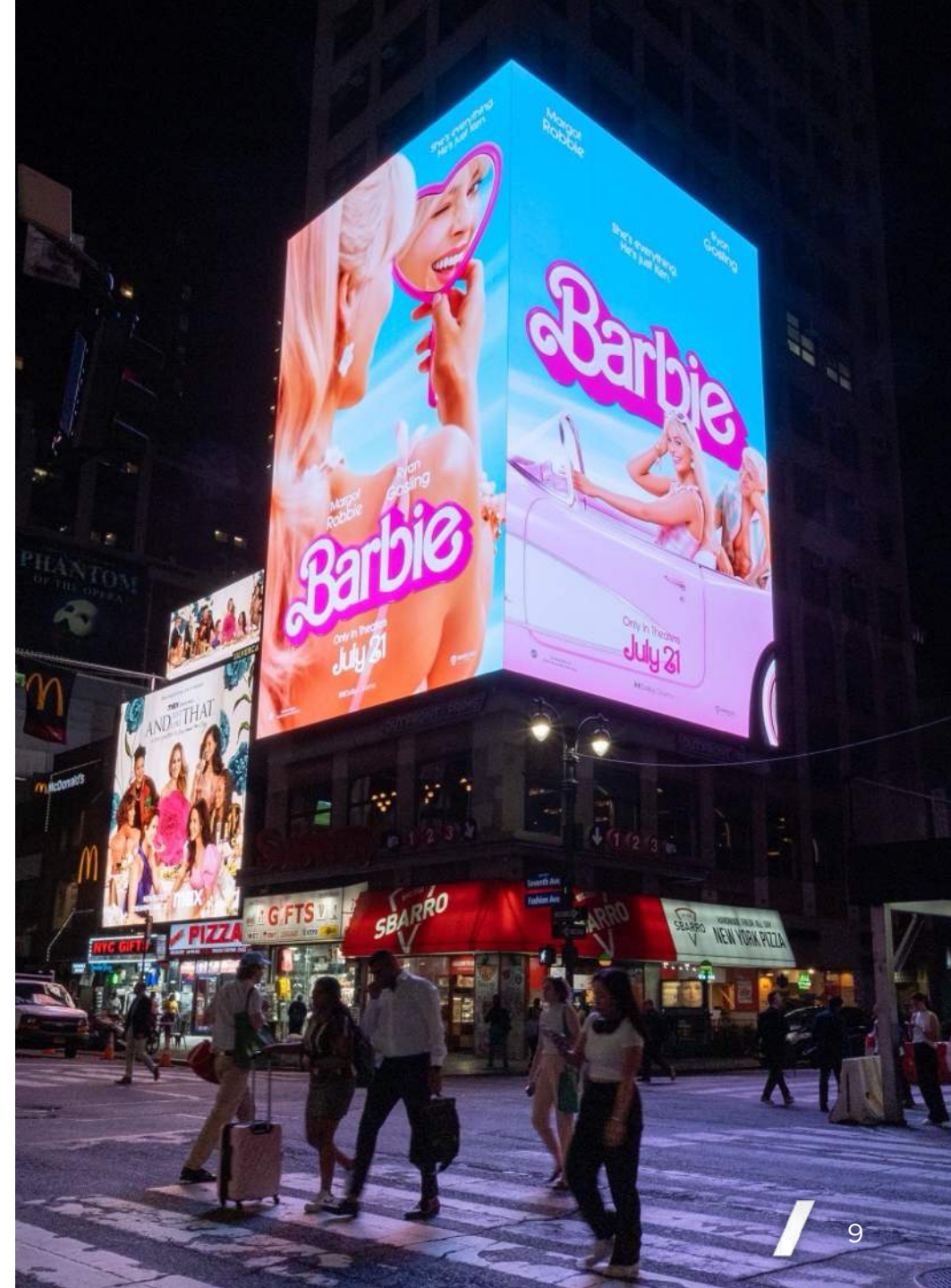
## Everything old is new again, or at least entertainment.

Humans are creatures of habit. We know what we love, and we want more of it. Maybe that's why out of the top 60 box office performers since 2016, only five of them were original titles rather than sequels, remakes, or other adaptations of existing intellectual property<sup>1</sup>.

Nostalgia is a powerful feeling, evoking happiness (53%) and comfort (40%)<sup>2</sup>. Brands can leverage those emotions, as 52% of consumers say they're **likely to make a purchase that makes them feel nostalgic**. And 56% say they like it when a brand uses throwback content in its ad campaigns.

Consumers are complicated though, because while 58% say they enjoy adaptations and 56% revivals, 56% also say that there are too many unoriginal shows and movies<sup>3</sup>!

SOURCES: 1. [YAHOO FINANCE](#), MARCH 2024, 2. [GWI](#), MARCH 2023; 3. [CIVIC SCIENCE](#), JULY 2023



# Being trustworthy **is profitable.**

“There is a **strong positive relationship**: countries with **higher self-reported trust attitudes** are also countries with **higher economic activity**. When digging deeper into this connection using more detailed data and economic analysis, researchers have found evidence of a **causal relationship**, suggesting that **trust does indeed drive economic growth and not just correlate with it<sup>1</sup>.**”

## – World Values Survey

- 53%** Trust US-based companies  
(-9% decline over last ten years)
- 61%** Think business leaders are purposefully misleading
- 42%** Will only buy from a trusted brand<sup>2</sup>





## CONSUMER TRENDS

# It's not just the buyer's journey: **customer service is omnichannel too.**

**44% say that “excellent customer service” is the main reason they remain loyal to a brand<sup>1</sup>. But what does excellent customer service look like in the digital age?**

The short answer: preferred-channel communication, and the human touch.

While 70% of customer service interactions are based out of call centers, 88% **prefer to connect with brands via messaging**, and 74% say they're **more likely to buy** from brands that offer the option<sup>2</sup>.

As for the human touch, 58% of customer service managers expect AI to be 2024's biggest trend<sup>3</sup> – but 86% of consumers **prefer talking to a real human**.

That disconnect also reveals itself in a **19-point enthusiasm gap** between business leaders and consumers on preference for AI.

SOURCE: 1. [EMARSYS](#), OCTOBER 2023; 2. [LIVEPERSON](#), FEBRUARY 2024; 3. [SUPEROFFICE](#), DECEMBER 2023





## CONSUMER TRENDS

# Artificial intelligence brings high hopes, also apprehension.

Generative AI has all but exploded, with 79% having some exposure to it and 22% already using it in their work<sup>1</sup>.

Consumers are excited about AI's potential but apprehensive about its impact. Though 70% believe the upside outweighs the risk<sup>2</sup>, only 24% trust companies to use it responsibly<sup>3</sup>.

### Top consumer concerns about GenAI<sup>2</sup>



SOURCES: 1. [MCKINSEY](#), AUGUST 2023; 2. [KPMG](#), JANUARY 2024; 3. [FORRESTER](#), MARCH 2024





## CONSUMER TRENDS

# Office-to-residential conversions seed a post-pandemic urban revival already well underway.

Cities are back! The pandemic-era exodus is over and a broad demographic recovery is in progress, with 7 out of the 10 largest cities in the U.S. seeing positive population shifts<sup>1</sup>.

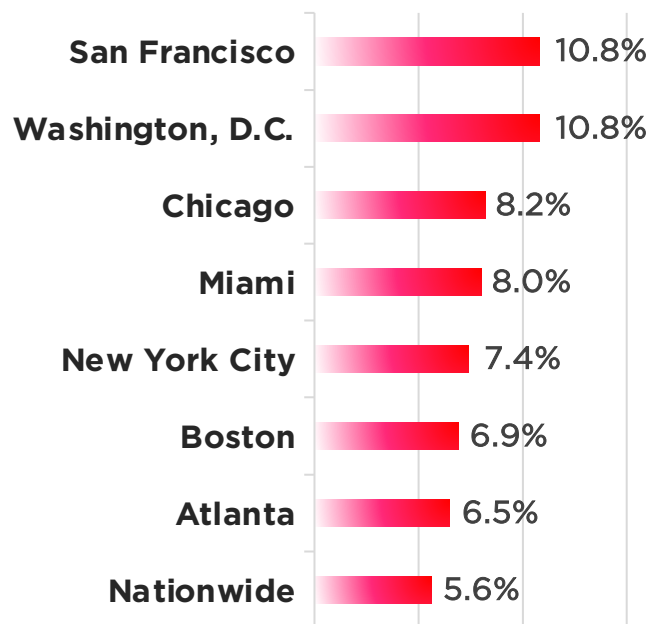
New York City is a perfect example of urban revival in action, showing promise across live, work, and play metrics. For example:

- **Office-to-residential conversions are up fourfold** since 2021. NYC's pipeline of 5,215 units represents 45% of the MSA's future apartment projects, ranking us second only to Washington, D.C. in this trend<sup>2</sup>.
- **Payroll employment has returned to pre-pandemic levels.** Nearly four years after the world shut down, New York has finally topped its February 2020 job numbers<sup>3</sup>.
- **Nearly 62 million tourists visited NYC last year**, spending \$75B. That includes 10.8MM international visitors, a 14.9% YOY increase<sup>4</sup>.

# We're going back to the office, but when? **Workers now commute to the office throughout the day.**

With remote and hybrid work, 9-to-5 is a state of mind, which is to say the traditional rush hour is no more.

YoY Office Visit Growth  
March 2024<sup>1</sup>

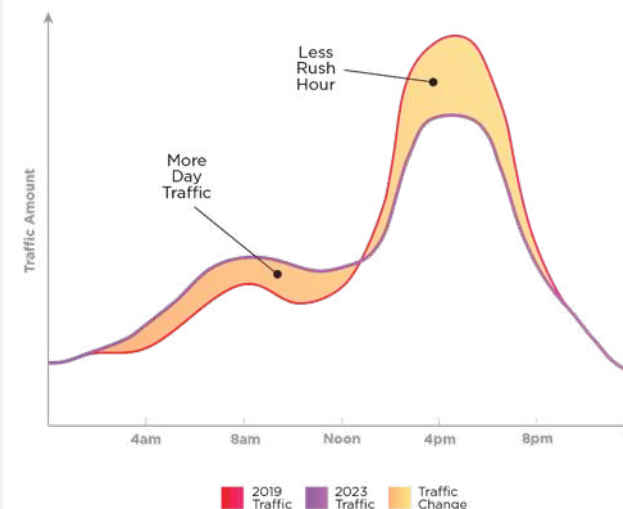


Hybrid work is here to stay. Sure, NYC's return-to-office rate hit 80% in April, with robust rates in many other large cities<sup>1</sup>. But workers aren't returning on the same schedule as before.

Commuter traffic is now spread across a much larger portion of the day, and a little rush hour relief is much welcome in a city whose traffic ranks as the slowest and most congested in the U.S..

How slow and congested? By the numbers: a typical 6-mile drive commute takes nearly 24 minutes, average speed of 15 mph. Over a full year that's 230 hours of driving, 108 in congestion, producing 95 trees worth of CO2 emissions<sup>2</sup>.

Traffic Distribution Shift,  
2019 to 2023<sup>3</sup>







# MEDIA TRENDS

MID 2024 - ADVERTISING TRENDS REPORT



# Election-year media buyers face inventory, brand safety challenges

**Record ad spend by candidates, PACs, and other political organizations is projected in 2024. That has implications for anyone who buys advertising media.**

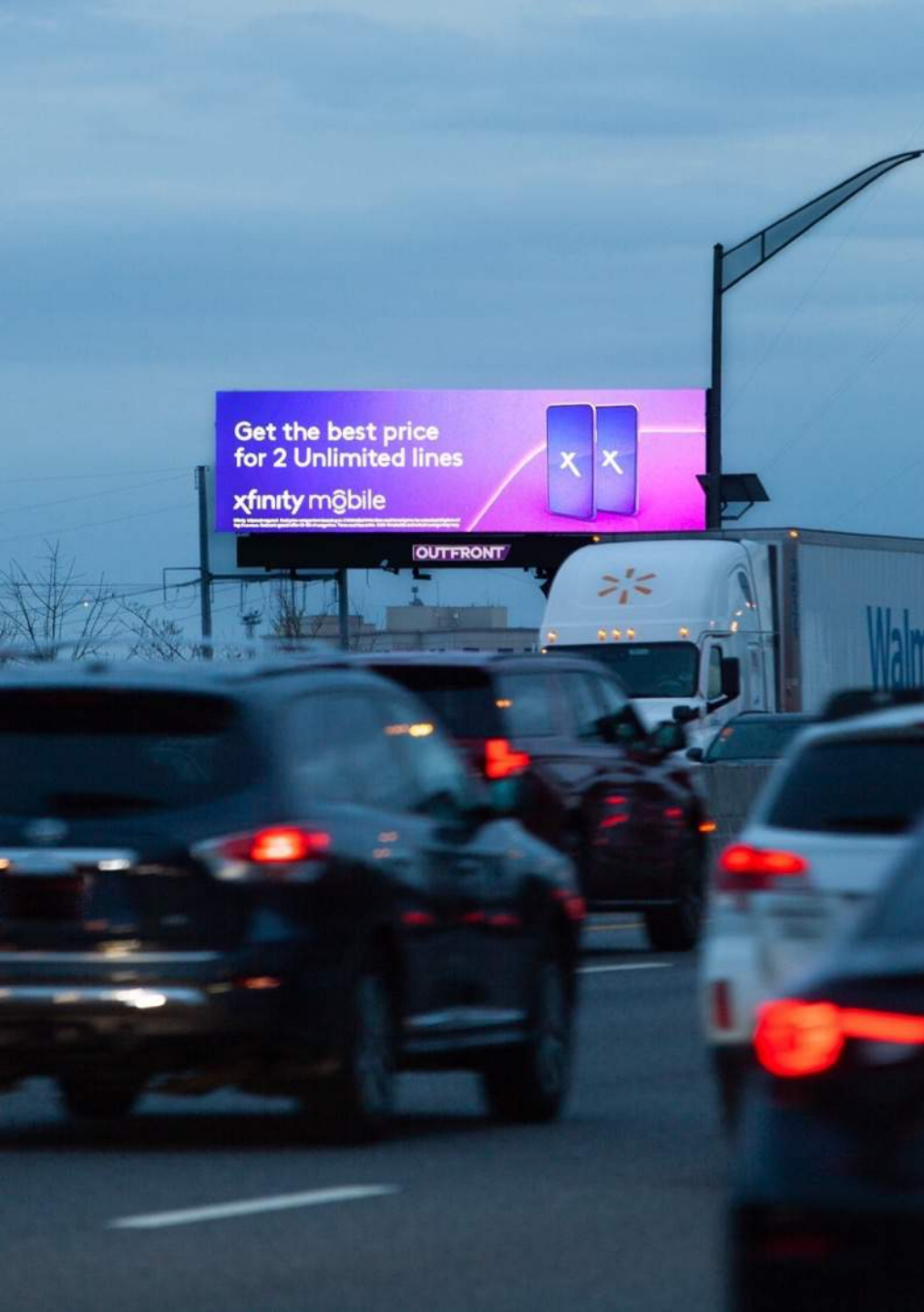
The first impact of political advertisers is **inventory availability**. With ad spend in the 2024 cycle projected to grow to \$15.9B – a 31.2% increase over 2020<sup>1</sup> – there's a lot more competition for limited ad space. That's why the savviest media buyers are locking theirs in early.

The second impact of political advertising is **brand safety**. In this hyperpolarized age, any political message has the chance of alienating half the audience. Brands should consider what their ads might run alongside and select formats like traditional static billboards that keep them far from contentious issues, inflammatory rhetoric, and fake news.

SOURCE: 1. [AXIOS](#), DECEMBER 2023







## MEDIA TRENDS

# Digital ad fraud is projected to cost advertisers \$71B in 2024

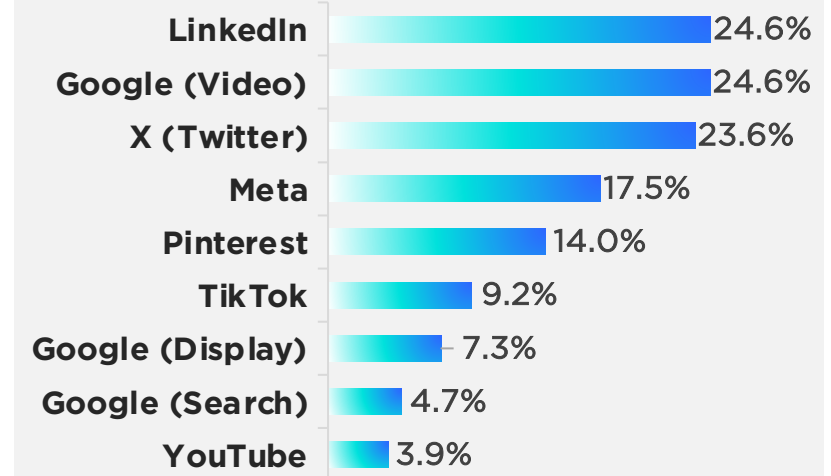
**“Bots, fake users, and fake clicks are becoming more and more pervasive. They instantly waste budgets, contaminate CRMs, distort analytics, waste the time and energy of sales teams, and make projected revenue forecasts unpredictable.”**

**– Neil Andrew, CEO of Lunio**

Digital ad fraud is a huge problem and only getting bigger. Just how big? Try 8.5% of paid traffic. In other terms: **1 out of every 12 website visits is fake.**

That fraud is projected to **cost advertisers \$71B** in 2024, a 33% rise since 2022.

### Invalid Traffic Rates





## MEDIA TRENDS

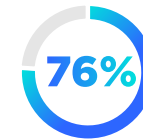
# Digital advertising has become an unpleasant experience for its intended audiences.

**Google's long-awaited deprecation of third-party cookies only addresses one of the things consumers dislike about digital ads.**

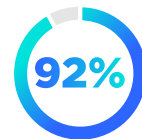
"Intrusive." "Annoying." "Disruptive." Those are the words with which 63% of AdBlock users describe digital media. That's why it's so critical to present advertising in such a way that doesn't interfere with the content consumers actually *want* to consume.



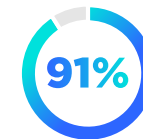
**Don't think advertisers respect their digital experience**



**Have a negative perception of brands with disruptive ads**



**Say ads have become more intrusive in the past few years**



**Will not purchase from a brand with intrusive or annoying ad experiences<sup>1</sup>**

Subpar user experiences lead to subpar outcomes, leading 50% of marketers to say **digital ads don't improve brand loyalty** and 44% to say **digital ads don't improve sales<sup>2</sup>**.

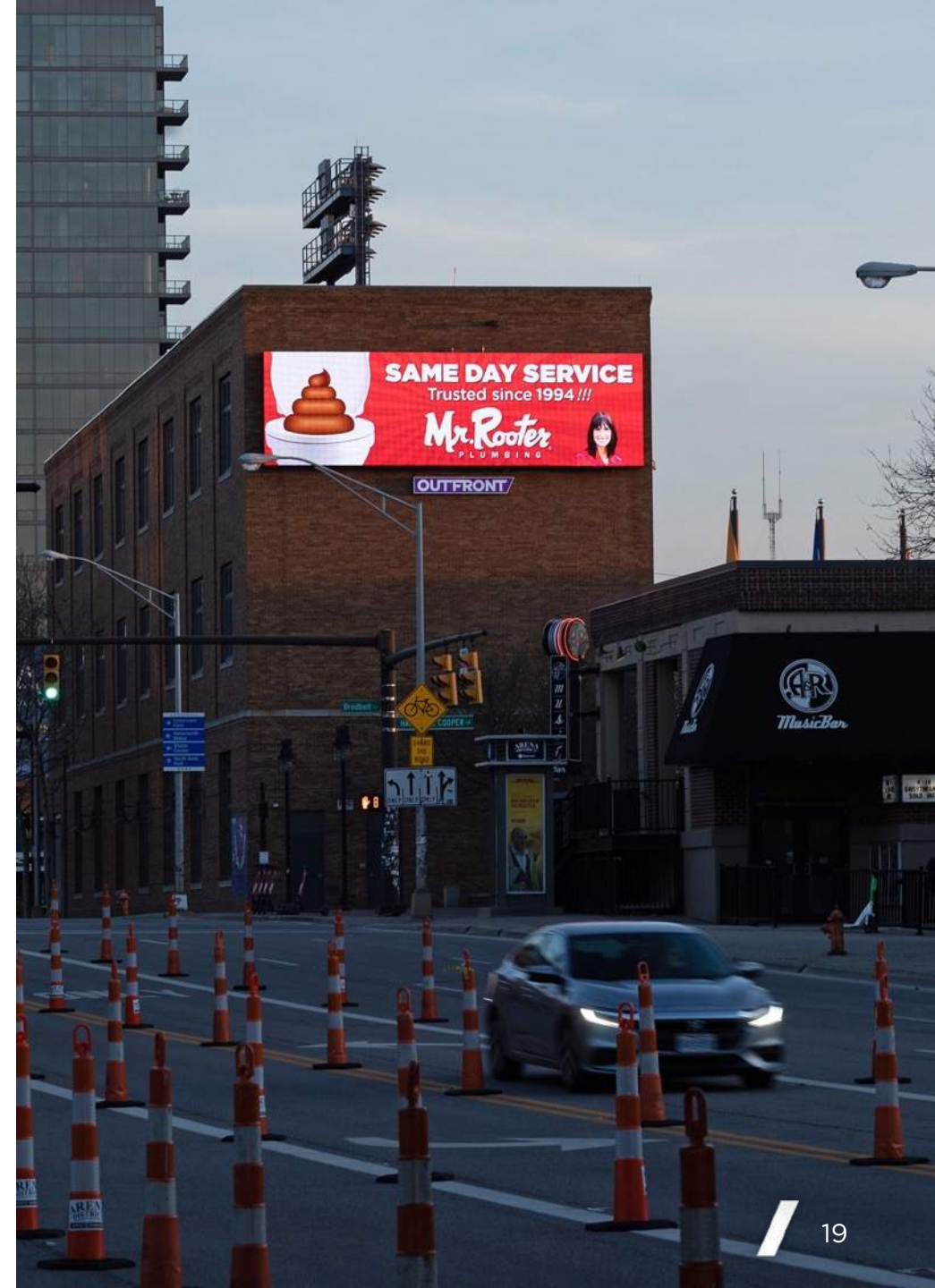


# The structural explanation for digital's decline: **enshittification**

What is “enshittification” and why did the American Dialect Society choose that as its 2023 word of the year? Here’s how Cory Doctorow, who coined the term, explained it:

“Here is how platforms die: **first, they are good to their users; then they abuse their users** to make things better for their business customers; **finally, they abuse those business customers** to claw back all the value for themselves. Then, they die. I call this enshittification, and it is a **seemingly inevitable consequence** arising from the combination of the ease of changing how a platform allocates value, combined with the nature of a “two-sided market”, where a **platform sits between buyers and sellers, hold each hostage to the other**, raking off an ever-larger share of the value that passes between them<sup>1</sup>.”

**While enshittification may explain digital advertising’s diminishing returns, thankfully it does not apply to OOH.**



## MEDIA TRENDS

# Streaming continues to erode the linear television value proposition.

**Broadcast and cable television continue to lose traction as consumers shift their screen time to streamers.**

As the reach of traditional TV continues to dwindle (with the exception of live sports), a long- favorite medium has lost its shine. Last year 21% said they were watching less broadcast/cable satellite TV; this year that number jumped to 34%. That shift is reflected in 56% of consumers now saying that streaming is their preferred means of watching TV<sup>1</sup>. Maybe that's why TV fell from marketers' third-most-preferred channel last year to 12th<sup>2</sup> in 2024.

### Broadcast viewership

**-4%**

YoY, March 2024

### Cable viewership

**-10%**

YoY, March 2024<sup>2</sup>

### Linear Upfront eCPM

**+12%**

YoY, 2023, Demo 18-49<sup>4</sup>

SOURCES: 1. [LG AD SOLUTIONS](#), APRIL 2024; 2. [NIELSEN](#), APRIL 2024; 3. [KANTAR](#), AUGUST 2023; 4. [GUIDELINE SOLUTIONS](#), APRIL 2024



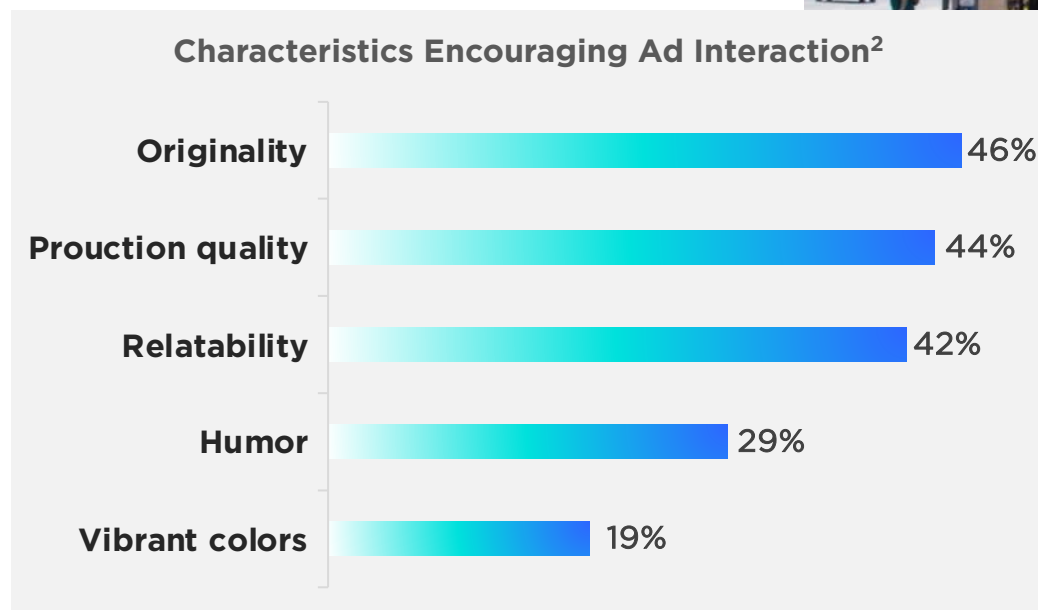


## MEDIA TRENDS

# To encourage engagement, align ads with consumer preferences.

While poorly executed digital ads are a turnoff, delivering the kind of ad creative consumers want to see, in the way they want to see it, is still effective.

So what kind of ad experience would consumers prefer? 68% say they're **most likely to engage with an ad when they're completely disengaged from content**<sup>1</sup>. Consumers also have strong preferences about what they want to see in the ad creative itself.



## MEDIA TRENDS

# There's a non-creepy **alternative to third-party cookies**. Context.

**Contextual relevance delivers personalization on a one-to-many scale by leveraging insights based on the audience environment.**

Brands can still deliver personalized ads without third-party cookies. How? The answer is contextual relevance, the practice of **aligning the content of an ad with the environment in which it will be consumed.**

**2 out of 3 consumers pay more attention to contextually relevant ads**, and the secret is shared experience<sup>1</sup>. Sports fandoms are a primary vector for such context. Weather is another big one – after all, if it's raining at the picnic, everyone's getting wet.

Think of contextual relevance as an inside joke between advertiser and consumer. But context's effectiveness is no laughing matter. Contextual relevance makes consumers:

- **2.5x more interested in the category**
- **36% more likely to enjoy the ad**
- **32% more likely to take action**
- **24% more likely to buy the product**
- **More receptive to future ads from the brand (85%)<sup>2</sup>**

SOURCES: 1. [DOUBLEVERIFY](#), NOVEMBER 2022; [SEEDTAG/NIELSEN](#), MAY 2022





## MEDIA TRENDS

# Brand activations can satisfy consumers' thirst for experience.

**Pop-ups, installations, sponsorships, and other in-person brand events are powerful tools for building loyalty.**

Consumers don't just go to stores to shop. They go for an experience. Activations are an impactful way for to nurture brand loyalty by **inspiring and delighting**, something for which consumer preference has risen 13 points this year<sup>1</sup>.

Activations are a doorway through which brands can bring consumers into their world. 90% of marketers say **brand experiences are important or absolutely critical** to the success of their business, and more than half plan to increase their investment in the channel in 2024<sup>2</sup>.



Report **increased trust** in a brand after interacting with it



Held **positive perceptions** of a brand for a month or more after the event<sup>3</sup>

**Brands that use activations see**

**3x**

**more word of mouth than those that don't<sup>4</sup>**

SOURCES: 1. [DENTSU](#), JANUARY 2024; 2. [ANYROAD](#), JANUARY 2024  
3. [FREEMAN](#), MARCH 2023; 4. [G2](#), DECEMBER 2023



SCAN OR CLICK TO SEE  
HOW COCA-COLA  
SURPRISED AND  
DELIGHTED SHOPPERS







## MEDIA TRENDS

# Nearly half of all Americans listened to a podcast last year.

**There are 160 million podcast listeners in the U.S. and they represent an attractive and engaged audience<sup>1</sup>.**

Podcasts deliver discussions of niche topics, obscure subjects and mainstream issues alike, captivating engaged audiences with everything from new music to true crime. To leverage that engagement, brands can complement sponsorship with a creative-aligned OOH campaign.

### Here's how podcasters influence and activate their audiences:

- 60% watched movies, read books, or listened to music
- 36% made or tried a lifestyle change
- 28% bought a product promoted or discussed on a podcast
- 13% took political action like donating or volunteering
- 12% bought merchandise<sup>1</sup>

### Advertisers should pay attention to podcast listeners, as they outpace the general public in several key areas:

- 52% make over \$75K (vs. 43%)
- 52% are college educated (vs. 45%)
- 69% are employed (vs. 54%)
- 12% more likely to own a home
- 19% more likely to own a pet<sup>1</sup>

SOURCES: 1. [PEW RESEARCH CENTER](#), JUNE 2023; 2. [PODCAST INDEX](#), APRIL 2024



## MEDIA TRENDS

# With phones now our primary shopping tools, **social media has become the new e-commerce.**

**Did you know that social media is now the #1 channel for product discovery for Zoomers, Millennials, and Gen X<sup>1</sup>?**

Mobile phones are now the most popular devices for online shopping, used by 78% of consumers and preferred by 45%. Three in four shop on their phones weekly<sup>2</sup>.

Now that social media has become a core part of the shopping journey, generating digital activation is more important than ever. Out of home's unmatched power in this regard can shorten the path from seeing the ad to buying the product.

In the United States,

**106.8M**

consumers shopped via  
social media in 2023

Online shoppers spent

**\$992B**

on social media  
commerce in 2022<sup>3</sup>

SOURCES: 1. [HUBSPOT](#), FEB 2024; 2. [INTEGRAL AD SCIENCE](#), OCTOBER 2023;  
3. [STATISTA](#), NOVEMBER 2023







## MEDIA TRENDS

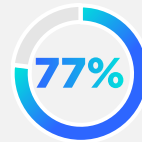
# Brands are embracing gamification to drive engagement and other KPIs.

**+48%**

Lift in customer engagement for brands integrating gamified elements

**+22%**

Increase in customer retention among brands with gamified loyalty programs<sup>1</sup>



Say interactive content enhances retention of brand messaging<sup>2</sup>

**Gamification is the incorporation of game design elements and principles into a process, task, or in this case, marketing campaigns.**

What do the Duolingo owl, Starbucks Rewards, and Spotify Wrapped have in common? They incorporate gamification to encourage learning, sipping, or listening.

Pretty much any activity can be gamified, including marketing campaigns. Keeping score, awarding badges, establishing loyalty program tiers/levels, and offering giveaways are just a few of the ways marketers can leverage the concept.

The motivation behind gamification is simple: **engagement – potentially a 100-150% increase<sup>3</sup>.** Greater customer engagement can increase spend, reduce acquisition costs, drive website visits, or support other business goals.

SOURCES: 1. [MAMBO.IO](https://mambo.io), JANUARY 2024 ; 2. [DEMANDGEN REPORT](https://demandgenreport.com); 3. [ADACT](https://adact.com), FEBRUARY 2024





# OUT OF HOME TRENDS

MID 2024 - ADVERTISING TRENDS REPORT



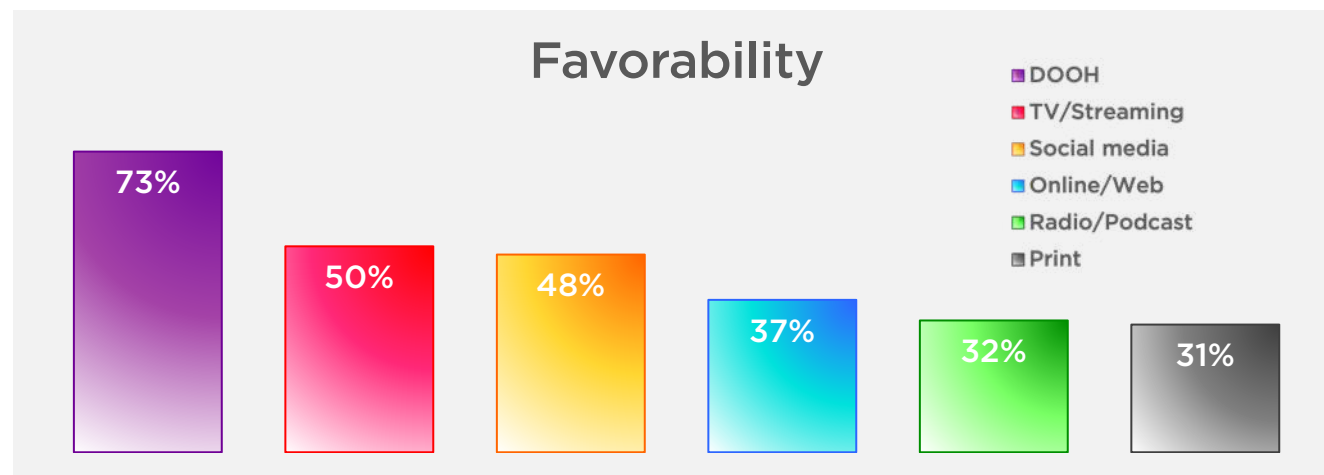
## OUT OF HOME TRENDS

# Out of home is **advertising's best-liked, most trusted medium.**

Digital out of home has the **highest favorability rating of any advertising channel**, holding a whopping 23-point lead over second-place TV<sup>1</sup>.

Out of home more broadly is also popular: 35% of consumers say OOH is their **preferred ad medium**, more than any other<sup>2</sup>.

It's also the **most trusted**, with 58% saying they believe what they see in out of home ads – more than any other format<sup>3</sup>.



SOURCE: 1. [THE HARRIS POLL](#), MAY 2024; 2. [BEEYOND MEDIA](#), NOVEMBER 2023; 3. [MFOUR](#), NOV. 2020







## OUT OF HOME TRENDS

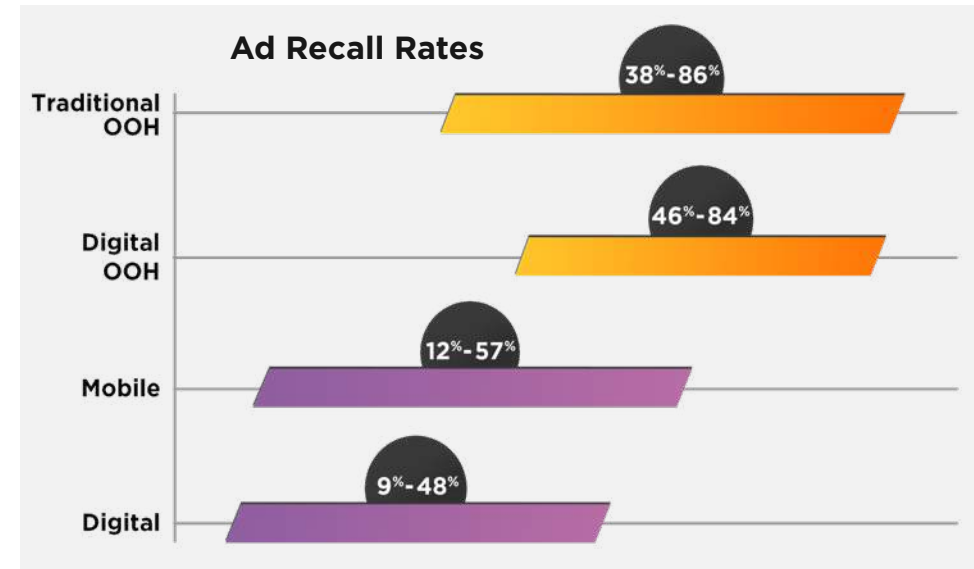
# Consumers **notice and recall OOH** at advertising's **highest rates.**

**Consumers overwhelmingly prefer to engage with ads while completely disengaged with content, which may be why out of home is one of advertising's most-noticed, best-recalled mediums.**

By virtue of their nonobtrusive nature, both traditional and digital OOH rank among consumers' favorite ad formats. That's good news for advertisers, because that affinity translates to attention.

Nearly nine in ten have noticed an out of home ad in the last 30 days; 85% say when they encounter OOH, **they look some, most, or all of the time**<sup>2</sup>. That's real attention.

For ad recall, digital and traditional OOH surpass the alternatives by far.



SOURCES: 1. [KANTAR](#), AUGUST 2023; 2. [THE HARRIS POLL](#), MAY 2024; 3. [SOLOMON PARTNERS](#), JANUARY 2023

# Awareness is just the beginning: OOH influences the full funnel.

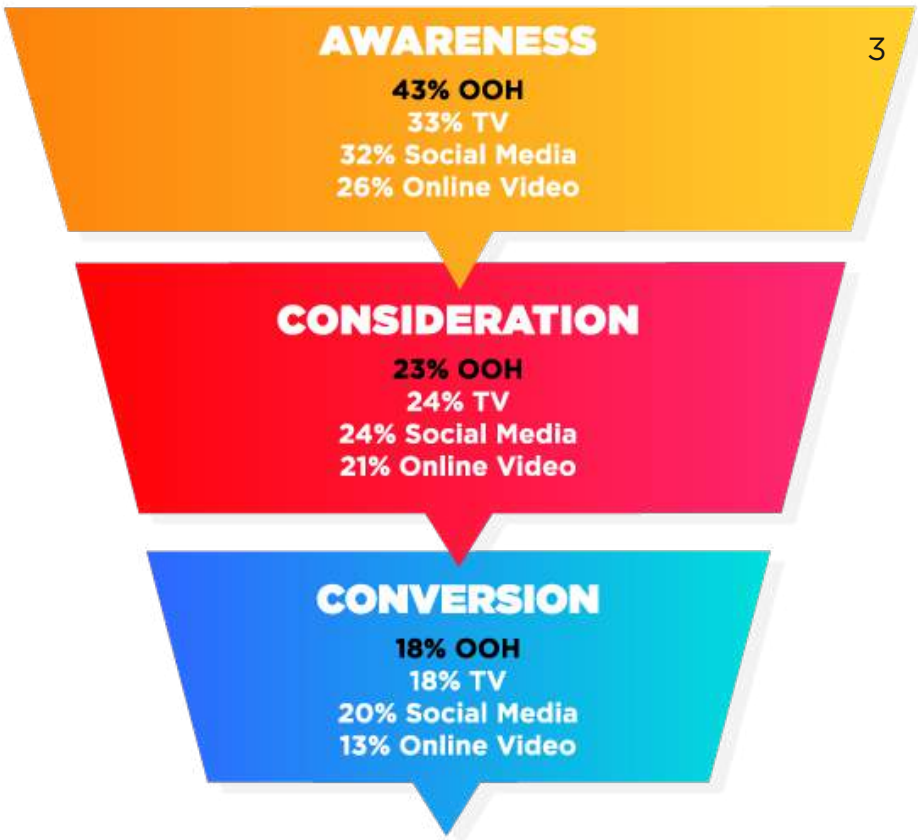
It’s easy to think of OOH solely as a brand awareness medium. But it also drives consideration and conversion at rates comparable to TV and social media.

Out of home impacts consumers all the way down the conversion funnel, and that influence doesn’t stop at the point of sale either.

38% of executives said that billboards **influence existing customers**, while 28% said they **increase customer retention** and 27% said they **increase loyalty**<sup>1</sup>.

OOH’s full-funnel efficacy might surprise you, with more than 2 in 3 campaigns resulting in lifted awareness, consideration, intent, or foot traffic.

Awareness Lift	Consideration Lift	Intent Lift	Foot Traffic Lift
72%	82%	79%	67%
of campaigns	of campaigns	of campaigns	of campaigns <sup>2</sup>



SOURCE: 1. [JOURNAL OF ADVERTISING RESEARCH](#), JUNE 2020; 2. [VISTAR MEDIA](#), MAY 2023; 3. [DYNATA & THRIVE INSIGHTS FOR MOVE](#), OCTOBER 2023

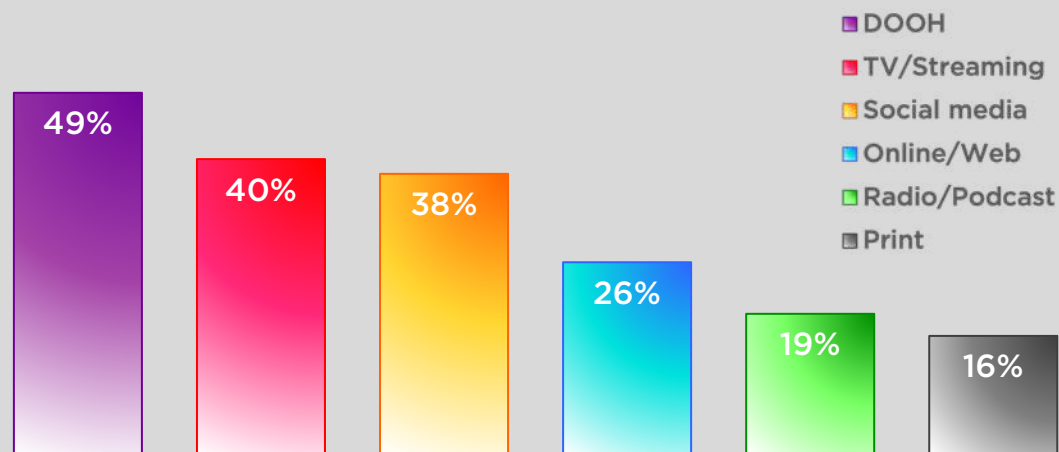


## OUT OF HOME TRENDS

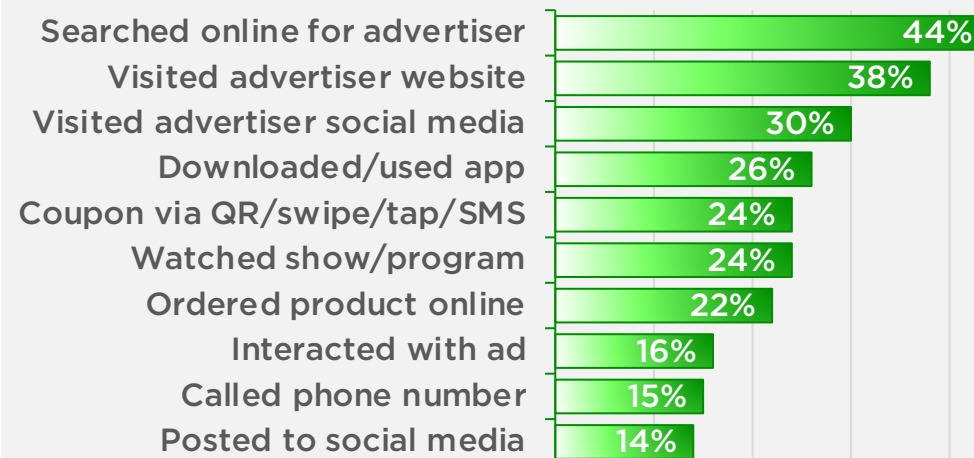
# Digital out of home drives the most action, online & off, vs. any other medium.

It doesn't matter whether an advertiser is aiming for a smartphone response or the go-outside-and-touch-grass variety; **digital out of home delivers results**. DOOH is the medium most likely to make consumers take action, every kind of action from a social out of home (#sOOH) post to a restaurant visit.

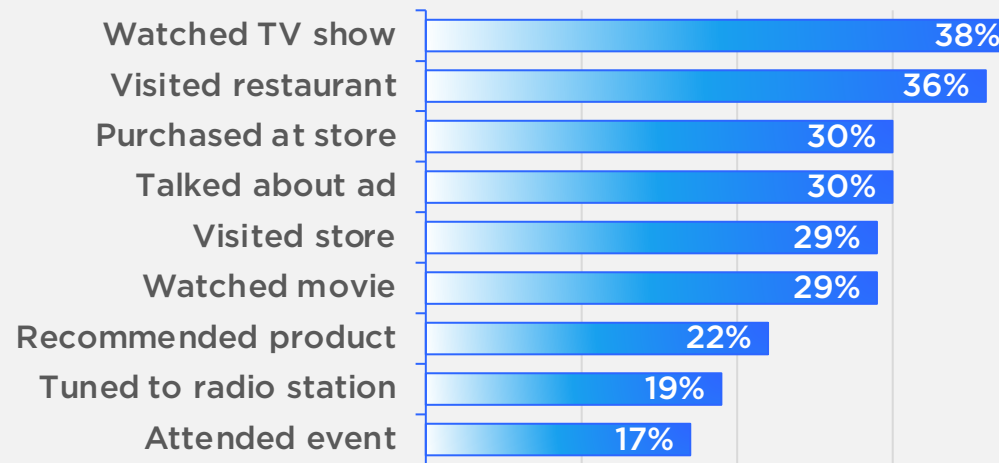
### Likelihood to Drive Action



### Online Actions Taken After DOOH Exposure



### Offline Actions Taken After DOOH Exposure





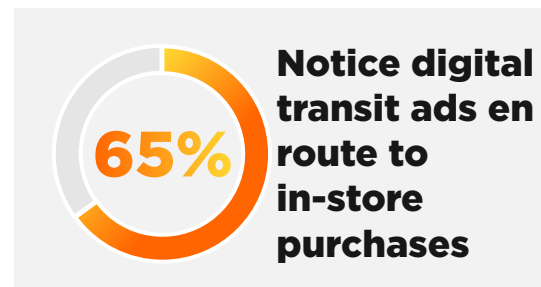
## OUT OF HOME TRENDS

# Transit moves consumers, not just literally, but to take action.

**Digital transit gets noticed and acted upon, especially when riders are on their way to make an in-store purchase.**

Transit advertising delivers frequency and that frequency makes a cumulative impact: **85% of viewers act** upon being exposed to digital transit media.

The actions most frequently taken offline and on after digital transit exposure were **visiting a restaurant** (43%) and **using online search** to research an advertiser (47%).





OUT OF HOME TRENDS

The **most digital activation per ad spend dollar? Out of home.**

**OOH outperforms every other advertising channel in driving eight key forms of digital activation, especially social actions.**

Engagement is a top-five challenge for marketers<sup>1</sup>, but with 40% of consumers who see a billboard ad engaging *immediately*<sup>2</sup>, OOH just might be the silver bullet.

When indexed against other mediums on a dollar-for-dollar basis, **out of home drives the most digital activation**<sup>3</sup>, no matter which KPI an advertiser wants to influence. Hello, social out of home!

Search Engine	Search Social	Search Video	Visit Website
5.3x	5.9x	5.7x	4.9x
Post to Social	Post Video	Download App	Purchase Online
7.0x	6.5x	4.8x	5.3x

SOURCES: 1. [HUBSPOT](#), JANUARY 2024; 2. [GITNUX](#), DECEMBER 2023; 3. [COMSCORE](#), JUNE 2022





## OUT OF HOME TRENDS

# OOH can **unlock the full potential** of any advertiser's **media mix**.

**Out of home plays a synergistic, complementary role to other advertising mediums, helping unlock their full ROAS.**

Creative for out of home necessitates distilling a message down to its purest essence, resulting in **powerful, concentrated branding** that translates well into other formats.

By aligning creative across mediums, the **reach and frequency** advertisers achieve with billboard and transit advertising primes consumers to be more receptive to the campaign when they see it elsewhere.

It's no wonder then that successful brands allocate double the average share of their media mix to OOH<sup>1</sup>.

**48%**

More likely to click a mobile ad after OOH exposure<sup>2</sup>

**40%**

Increased return on investment for search<sup>3</sup>

**2x**

Brand recall when OOH & TV creative are aligned<sup>4</sup>

SOURCES: 1. [WARC](#), 2018; 2. [NEURO-INSIGHT](#), 2015; 3. BENCHMARKETING, 2017 ; 4. [SYSTEM1](#), DECEMBER 2023



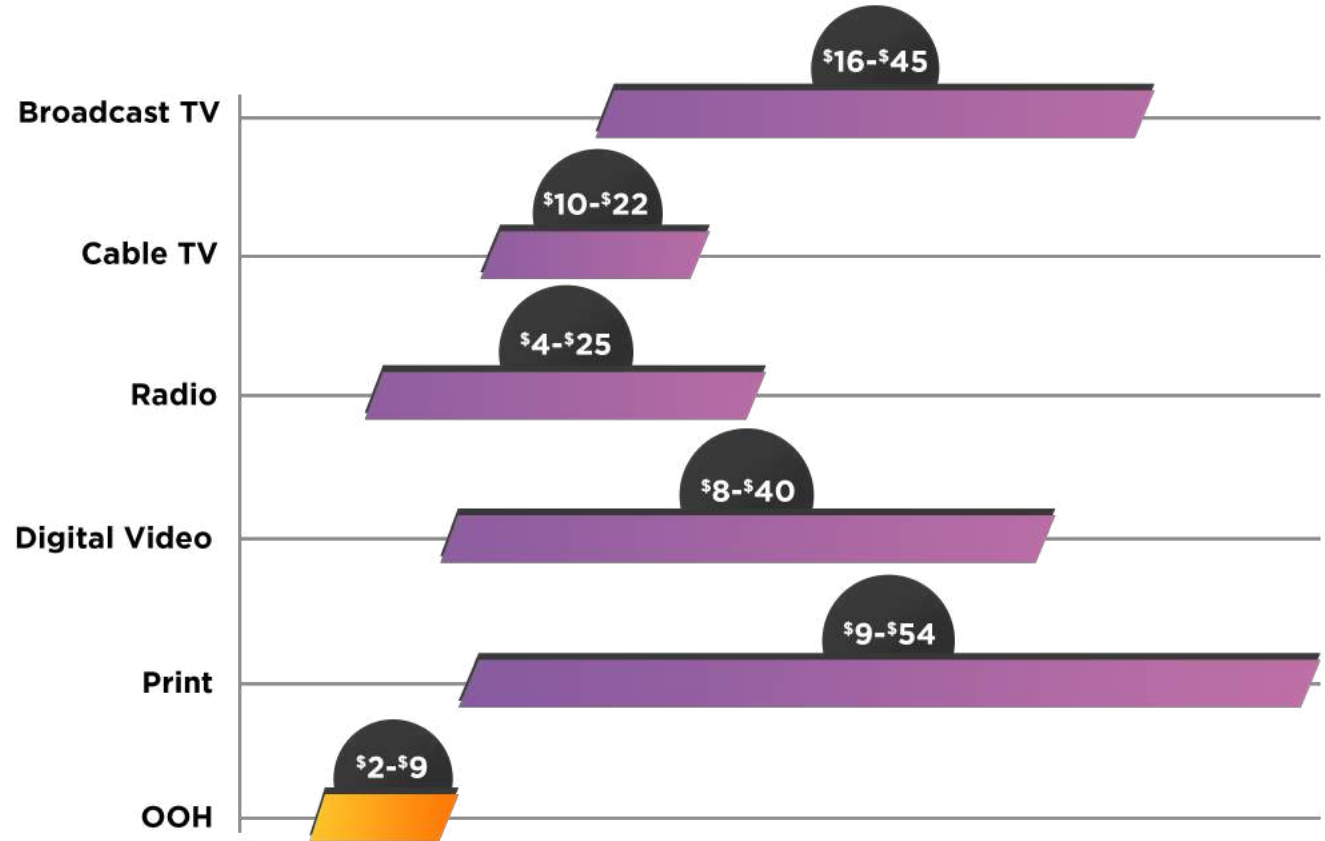
## Out of home offers some of advertising's lowest CPMs.

**With some of the lowest CPMs in all of advertising, OOH represents a tremendous value.**

Getting a message across to consumers requires reach and frequency – and with some of the lowest CPMs in all of advertising, out of home makes getting to that critical mass point affordable.

With so many different formats to choose from and geographical coverage across the top 50 metropolitan areas, there's an OOH media plan to accommodate virtually any budget.

US Major Media CPM Comparison



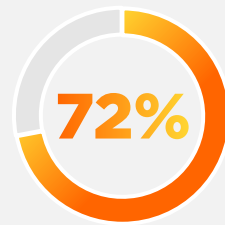
## OUT OF HOME TRENDS

# 3D billboards drive brand affinity, engagement, social sharing, and purchase intent.

**Dimensional out of home – colloquially known as the 3D billboard – can make a powerful impact on consumers.**

You've likely seen them on your social media feed – the astounding 3D billboards whose subjects seem to leap through the fourth wall and into the real world. But you might not realize just how impactful they can be:

- 55% of consumers are **likely to record** dimensional OOH ads
- 58% would **share via social media**
- 68% see brands using dimensional OOH as **more premium**
- 66% say they are **more likely to buy** the product advertised<sup>1</sup>



**Interested  
in 3D out of  
home  
creative<sup>2</sup>**

Something else you might not know: 3D creative is no longer limited to billboards. **XScape**, the dimensional creative advanced capability from our **XLabs** team, allows advertisers to execute 3D in large-format anamorphic or small-format spatial including transit media like Liveboards and Video Urban Panels.







OUT OF HOME TRENDS

Data-driven dynamic creative creates opportunities to connect.

Achieve all-important contextual relevance with dynamic DOOH, incorporating live data into the creative or using it to trigger variants.

Real-time data like weather, traffic conditions, sports scores, wait times, and inventory levels can all be incorporated into OOH campaigns with **XPress**, the data-driven dynamic creative capability from our **XLabs** team.

There are two ways to do approach dynamic digital. The first is to include a piece of live data – like the current temperature – in the creative, which updates automatically in real time. The second is to use live data conditions to trigger different versions of the ad creative. For example, a coffee ad that automatically pitches cold brew on warm days and hot drinks on cool ones.

What types of dynamic content do consumers find most useful?	Grocery Deals	Restaurant Deals	Traffic Updates	Weather-Related Offers
	86%	84%	84%	81%
	Time-Specific Offers	Clothing & Accessory Deals	Local Event Reminders	TV/Streaming Reminders
	80%	80%	78%	74%

SOURCE: [THE HARRIS POLL](#), MAY 2024



## OUT OF HOME TRENDS

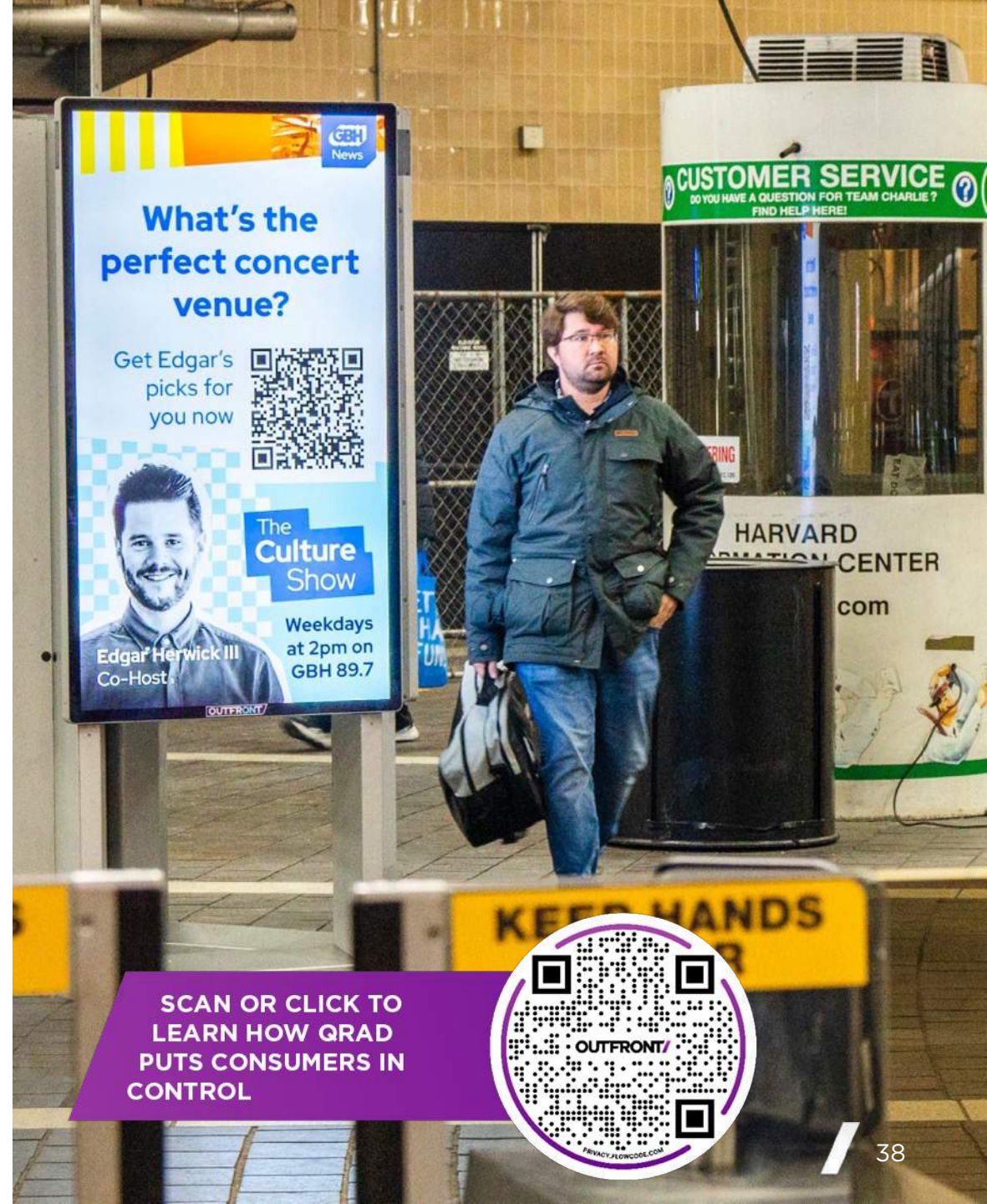
# Upgraded QR capabilities drive deeper engagement by putting consumers in control.

**Alternate endings aren't just for superhero movies. Quick reaction ads allow consumers to choose their own ad journey.**

QR codes have just been upgraded. With **QRad**, the content control capability from our **XLabs** team, they're no longer just a passive way to open a webpage. Now those very same QR codes can trigger changes in DOOH ad creative itself, translating user input into a selection of pre-set creative options.

Imagine if you could scan an automaker's QR and then choose the color of the car in the ad. Or if scanning an airline's ad allowed you to select the featured destination!

Gamification, shoppable DOOH, real-time offers, and wayfinding are just a few of the other potential applications of the technology. What could your brand do with QRad?







## OUT OF HOME TRENDS

# Out of home is the perfect doorway into **augmented reality experiences.**

**Brands as diverse as WWE and Maybelline have embraced augmented reality; OOH is uniquely positioned to serve as an entry point into immersive brand experiences using AR technology.**

Geospatial augmented reality turns the world into a brand's playground by mapping the world in three dimensions and then allowing content to be attached remotely to any coordinate on that map.

That means advertisers can use technology like **XTend** by our **XLabs** team to create deeply immersive branded experiences like the Platinum OBIE Award-winning *Space Invaders: World Defense*, an interactive game that had players blasting pixelated aliens out of the skies above their neighborhoods.





## OUT OF HOME TRENDS

# Audience-based purchasing ensures that the campaign gets in front of the intended eyes.

**Programmatic and other forms of audience-based buying deliver ads exactly when and where target audiences are most likely to be exposed.**

**Audience-based buying** is an out of home advertising approach that's less "I want a billboard on Main Street" and more "I want 10,000 impressions from pet owners."

If you're a pet shop, that approach makes a lot of sense – because the alternative is impressions wasted on people without pets. With audience-based buying, a campaign is optimized for maximum exposure to the consumers who matter most.

Our proprietary DMP **smartSCOUT™** makes it simple to execute a campaign that's **Powered by Audiences** for both static and digital campaigns, while our **Digital Direct Ad Server (DDA)** delivers the same convenience, flexibility, and granularity as programmatic – but without the heavy lifting.



## OUT OF HOME TRENDS

# Proximity marketing puts brands up close and personal with desirable niche audiences at special events.

While some contextual relevance can apply to the entire population of a region, there's a variation on the theme that allows for even deeper connections with a niche audience that's not typically addressable in a single location.

Special events like Coachella, Art Basel, and **San Diego Comic-Con** can completely transform the audience exposed to an OOH asset. When brands target specific consumers connected by a common interest or activity, proximity marketing strategies like our **PRIME for a Time** program concentrate an advertiser's message for its most receptive audiences.





## OUT OF HOME TRENDS

# Out of home's **measurement and attribution capabilities** are more robust than ever.

**From social listening to brand lift studies, there are more ways than ever to evaluate the success of an out of home campaign.**

OOH can provide marketers measurement and attribution insights that stand toe-to-toe with the capabilities of today's top digital formats.

**Attribution studies** can measure brand lift, sales lift, tune-in, website visitation, and app downloads. Bus measurement is the newest arrow in the attribution quiver, adding on to our previous subway and billboard measurement capabilities.

When a campaign has creative that's likely to cause chatter, **social listening** can tell exactly how far word travels.

If digital activation is the goal – app downloads, website visits, lead gen – **QR codes** not only convert but measure.







## OUT OF HOME TRENDS

# Retail media networks take advantage of OOH's lower-funnel efficacy.

**For CPG brands, retail media networks now rank as the single most important element in their media plans<sup>1</sup>.**

**Retail media networks (RMNs)** offer numerous benefits to brands: a better understanding of the consumer, a stronger relationship with the retailer, a better shopping experience, and perhaps most importantly, a presence close to the point of purchase.

Best of all, RMNs work! 77% of CPG marketers described last year's results as good or excellent<sup>2</sup>; 64% say retail media networks are even more important to them this year.

While in-store media may be the last RMN ad consumers see before buying, it's not the only one – 60% of RMN advertisers include offsite OOH assets in their plans.

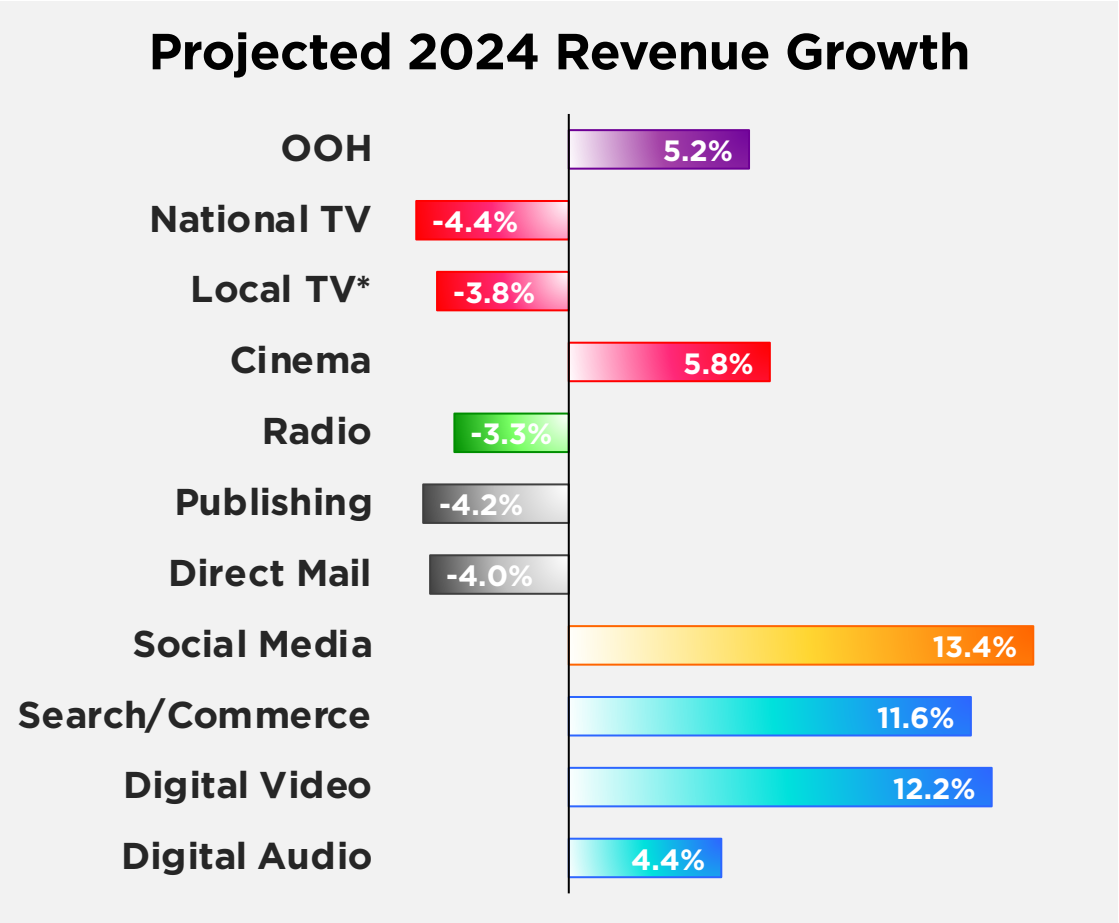
OUT OF HOME TRENDS

While traditional mediums struggle, out of home continues trending upwards.

OOH and cinema are the only traditional media formats projected by Magna to grow in 2024.

After Q4 saw the advertising industry’s strongest non-cyclical revenue growth in nearly two years (+9.1%), Magna increased its full-year growth projection by nearly a full percentage point.

Improving consumer sentiment is partly responsible for the optimism; so are major cyclical events such as the election and Summer Olympics, which are expected to boost incremental revenues by \$10B. Political advertising spend is projected to rise 13% over the 2020 cycle.



+5.2%

OOH growth

\$9.7B

OOH revenue

\$3.1B

DOOH revenue

+9.5%

DOOH growth

(Projected, 2024)

SOURCE: [MAGNA GLOBAL](#), MARCH 2024  
\* EXCLUDES MAJOR CYCLICAL EVENTS



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Win a trip to Iceland

ICELANDAIR BLUE LAGOON

**THANK YOU!**

**OUTFRONT**

ARE YOU READY FOR  
YOUR NEXT OUT OF  
HOME CAMPAIGN?  
CONTACT US NOW!

