

THE DOOH DIFFERENCE

REPORT 2022

Global consumer attitudes to digital outdoor
advertising and its unique potential for brands



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EXECUTIVE SUMMARY



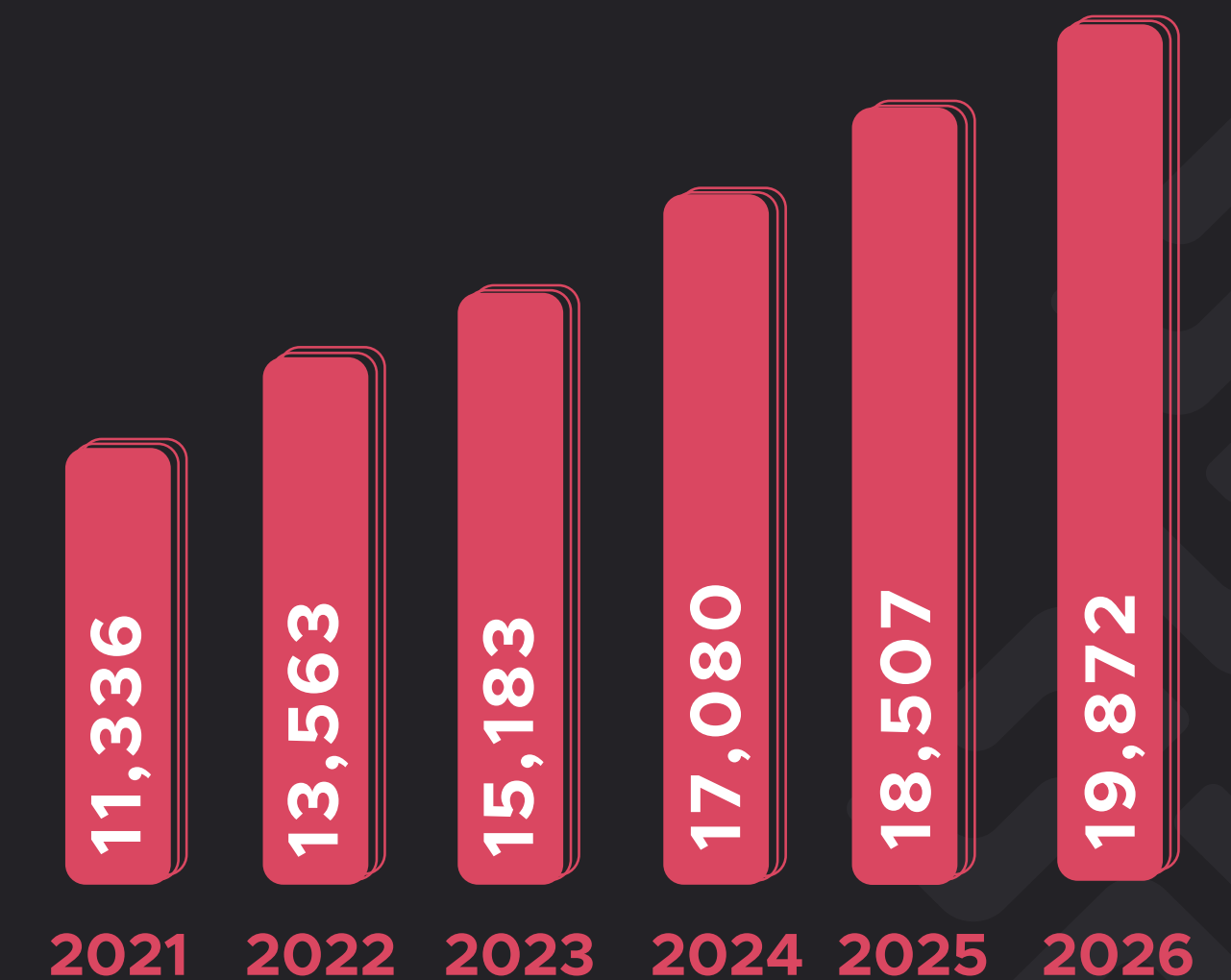
DOOH: THE BIGGER PICTURE

Marketers plan to continue increasing their investments in DOOH over the next five years, according to GroupM estimates. DOOH investment is tracking to exceed the growth rates of overall advertising investments each year – and by 2x over the next three years. With other formats fluctuating, GroupM expects this to leave DOOH with a share of the overall market that rises from 1.5% today to 1.9% in 2026.

A study conducted for Xaxis by DPAA, the global digital out-of-home marketing association, found that marketers are comfortable integrating the new capabilities of DOOH into wider digital media buys. These capabilities include new forms of audience targeting, enhanced screen interactivity, and the ability to purchase inventory through programmatic platforms.

In addition, new ways of gathering and using data with DOOH enable personalization, localization, cross-channel (a.k.a. omnichannel) targeting, and added flexibility in moving budgets across formats to make real-time adjustments. DOOH is evolving and growing, and marketers seem eager to capitalize on its expanding potential.

But while seeking to understand the full potential of DOOH, we realized that our understanding of the landscape lacked a crucial piece of the bigger picture: The consumer perspective. To that end we posed a number of questions to consumers to analyze the impact of DOOH by itself and in comparison to other advertising formats. The findings in many cases were surprising. Consumers don't just welcome DOOH into their environments, they often find it innovative and informative. In fact, consumers often feel more favorably towards DOOH than do marketers.



MARKETER INVESTMENTS IN DOOH
(MILLIONS)

GROUPM INTELLIGENCE DATA, 2022

“

Our projections show steady growth in DOOH investments over the next five years, which is attributable mainly to the increasing availability of new inventory and the growing flexibility of the medium. As those trends progress, out-of-home marketing is becoming more accessible for more marketers while also enabling greater control over the scale and strategy of OOH media investments.

”

KATE SCOTT-DAWKINS

GLOBAL DIRECTOR, BUSINESS INTELLIGENCE, GROUPM



GOALS

Are consumers moved by DOOH? Do DOOH ads influence, impress, or inspire people to recall, react, or respond?

As marketers we have our own understandings about the strengths and value of this format. But we wanted to know what it looks like from the other side as well – from the consumer perspective – to see how people all over the world are responding to DOOH. We also wanted to examine and challenge marketers' assumptions about DOOH to help build a bigger picture of what the perceptions are and what makes this medium different.

OUR STUDY IDENTIFIES AND QUANTIFIES:

- New and emerging consumer behaviors related to their interactions with DOOH.
- The impact of DOOH on other advertising channels, both as part of the holistic media mix and from the perspective of the end user.
- Consumers' perceptions about the strengths of DOOH relative to other formats.
- The ability of DOOH to influence consumer perception and drive actions.

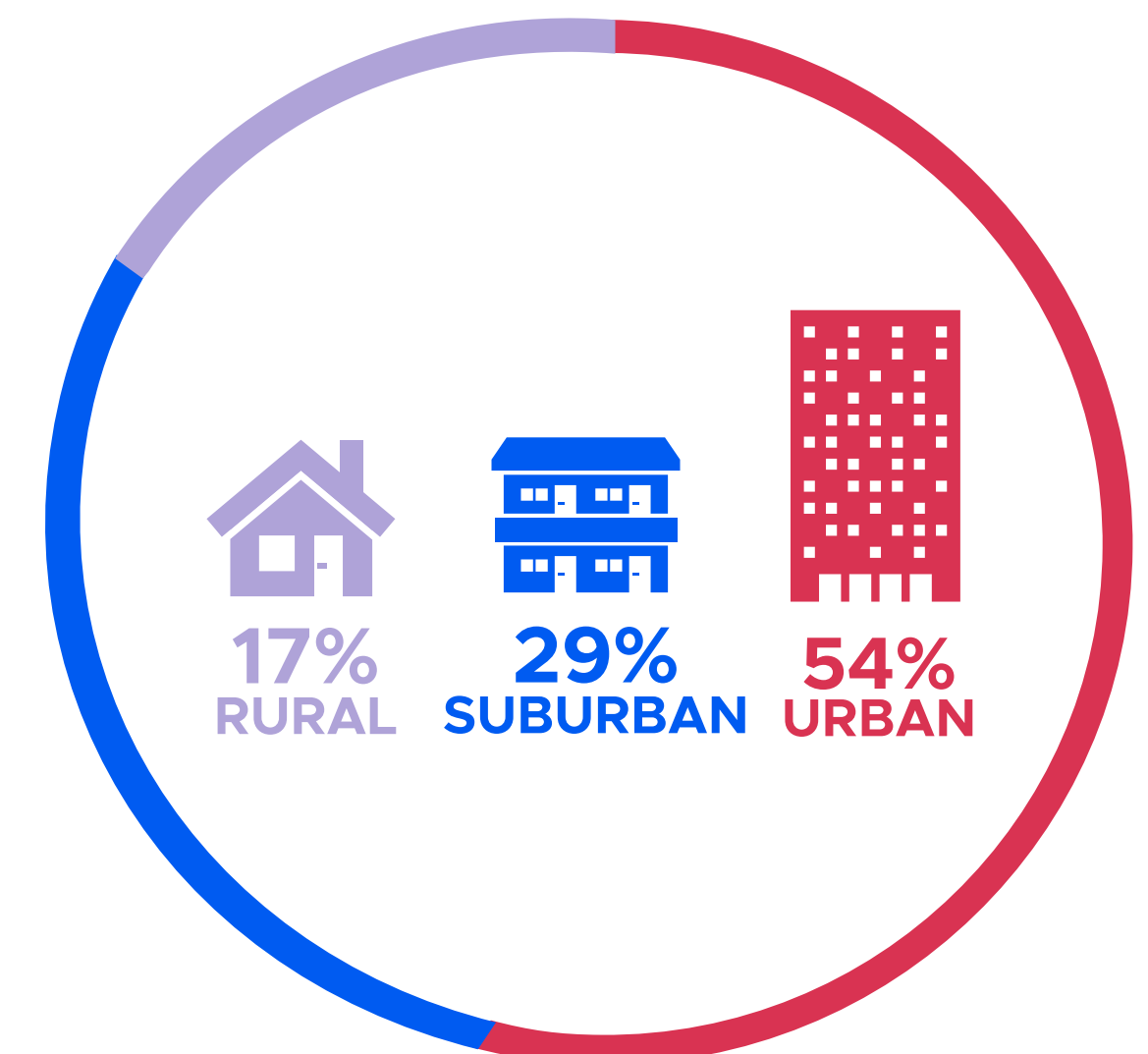
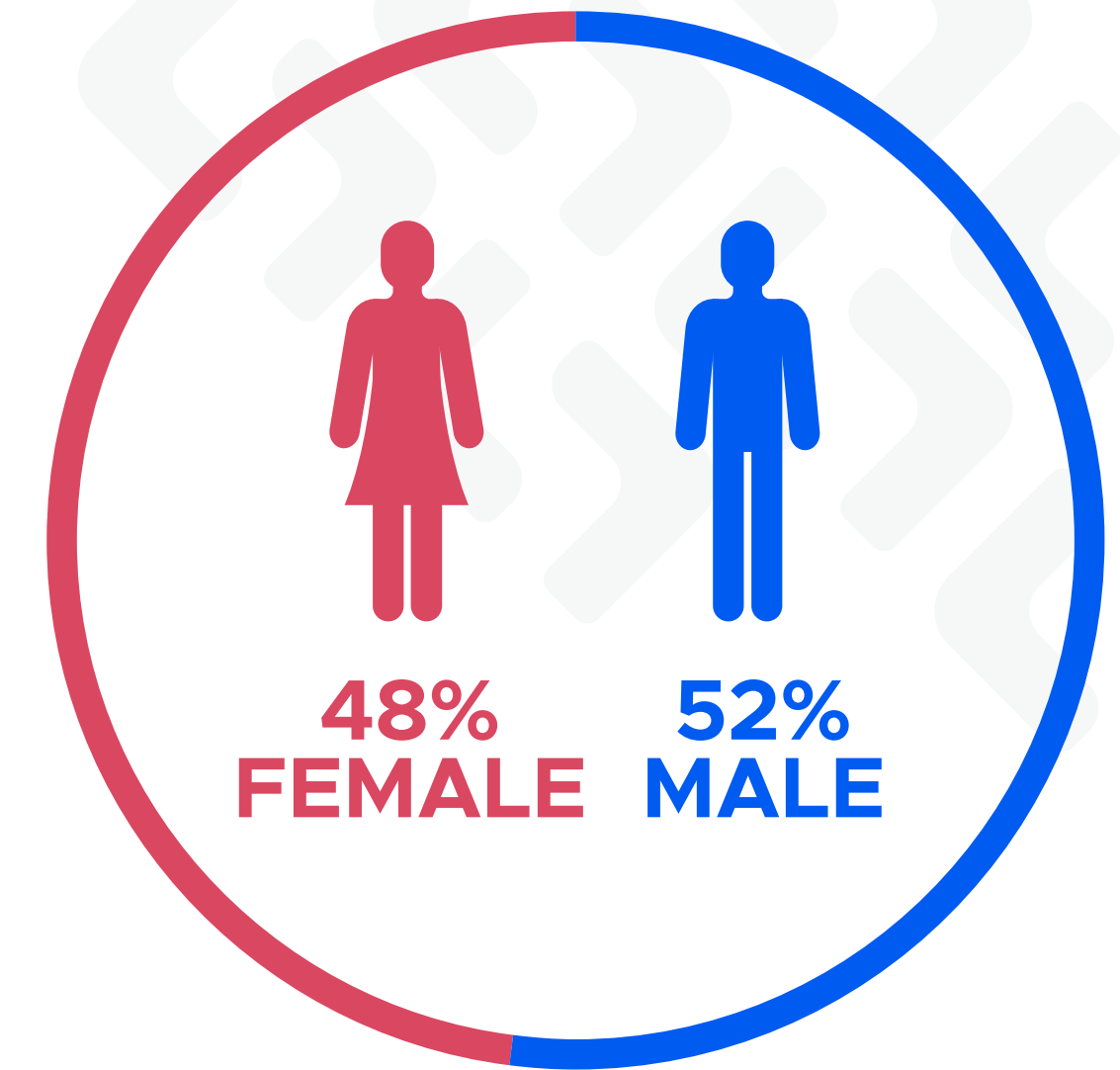
METHODOLOGY

The DOOH Difference Study was conducted to help quantify the appeal of digital out-of-home advertising (DOOH) for consumers by asking them to rate it in 14 unique perception metrics. We also wanted to uncover how DOOH compares with and potentially complements media consumed through eight other prominent advertising channels.



METHODOLOGY

Kantar Group conducted the study on behalf of Xaxis and Kinetic, which have teamed to lead Sightline. A 15-minute survey was completed by 11,000 respondents across 11 countries around the world. All respondents were over the age of 16. Kantar set quotas to ensure that the demographic range of the respondents (age, gender, social grade) was in proportion with the respective national averages of each region.



EXECUTIVE SUMMARY

This study finds that consumers welcome DOOH in their surroundings, often saying it adds to their experiences outside the home, prompts interactivity and engagement with the advertisers' messages, and increases their propensity to make a purchase.



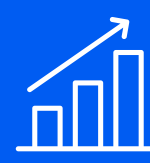
A majority (70%) of consumers believe **DOOH “feels really current”** and many find it to be useful for learning more about products and brands.

77%

describe it as
“very” or “quite”
informative

53%

say it gave them all
the information they
needed to make a
purchase



DOOH is showing increasing traction as a performance medium, with many consumers saying it inspires interaction and encourages them to make a purchase.

50%

say DOOH
encouraged them
to make a purchase
there and then

94%

find QR codes
to be useful



They find DOOH appealing in multiple ways, often surpassing other forms of traditional and digital media.

+6%

higher scores than TV for brand perception



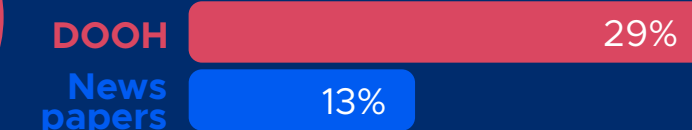
+7%

higher scores than online ads for trustworthiness



+16%

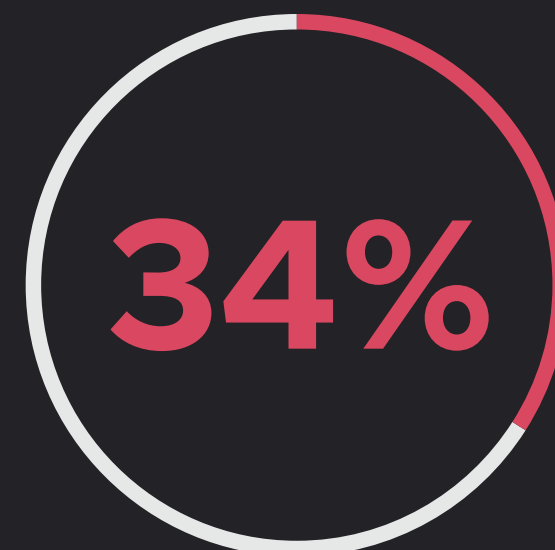
higher scores than newspapers for creativity



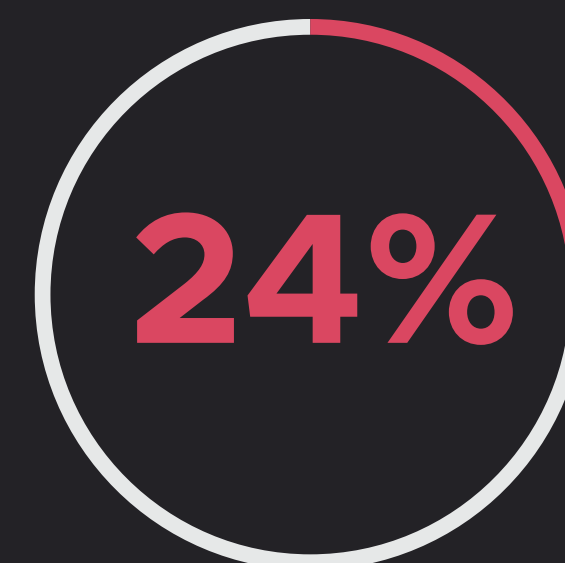
DOOH AS A PERFORMANCE MEDIUM



have visited a
website from a
DOOH ad



have used a
hashtag they saw
on a DOOH ad



have used
a QR code



“

Out-of-home has always been a powerful one-to-many broadcast medium that helps to reach and engage with your audience on the move. Radical evolution of the OOH industry has created a data ecosystem that leverages mobile data to enable in-depth audience planning, enhanced contextual creativity, and performance measurement. The survey findings endorse that the potential for DOOH to engage consumers is unlimited and continues to evolve along with the digital landscape.

Brands have an opportunity right now to activate in new ways and drive lower-funnel conversions via DOOH. This is supported by the survey findings that marketers' significant investment plans for DOOH are driven by this programmatic enablement; moving OOH from a silo channel to one that is now fully integrated into the wider communication mix and delivering premium targeted solutions at scale in a public, brand-safe, and trusted way.

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DENNIS KUPERUS

HEAD OF GLOBAL CREATIVE AND INNOVATION PARTNERSHIPS, KINETIC

MAIN FINDINGS

HOW CONSUMERS SEE DOOH
RANKING THE ATTRIBUTES OF DOOH

HOW CONSUMERS SEE DOOH

A significant portion of our study focused on consumer attitudes toward DOOH. In 11 countries spanning the globe, consumers were asked their perceptions of and feelings toward the format and were also asked similar questions about other major advertising formats. Overall, consumers described DOOH as:

INNOVATIVE

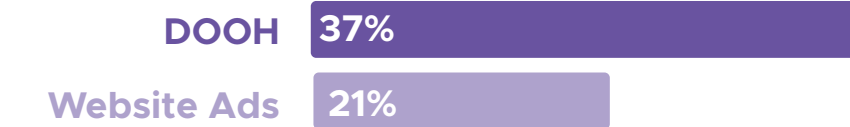
Consumers find DOOH to be tops in innovation, ranking it higher than do marketers in most of the countries we surveyed and considering it to be the most innovative of all the advertising formats included in our survey.



DOOH was ranked as the most innovative ad format in 7 of 11 countries we surveyed.

RELEVANT

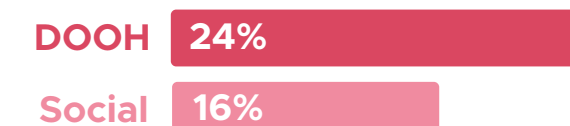
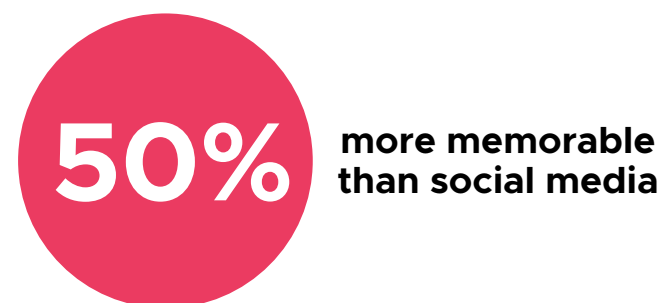
Consumers overwhelmingly find DOOH ads to be current, interesting, and humorous. DOOH, they say, connects to social media channels, encourages them to search, and inspires interaction.



Consumers who said the channel is “entertaining”

MEMORABLE

Our survey also finds that DOOH outperforms other media channels, including TV, social media, and online videos, in creating a lasting impression on consumers.

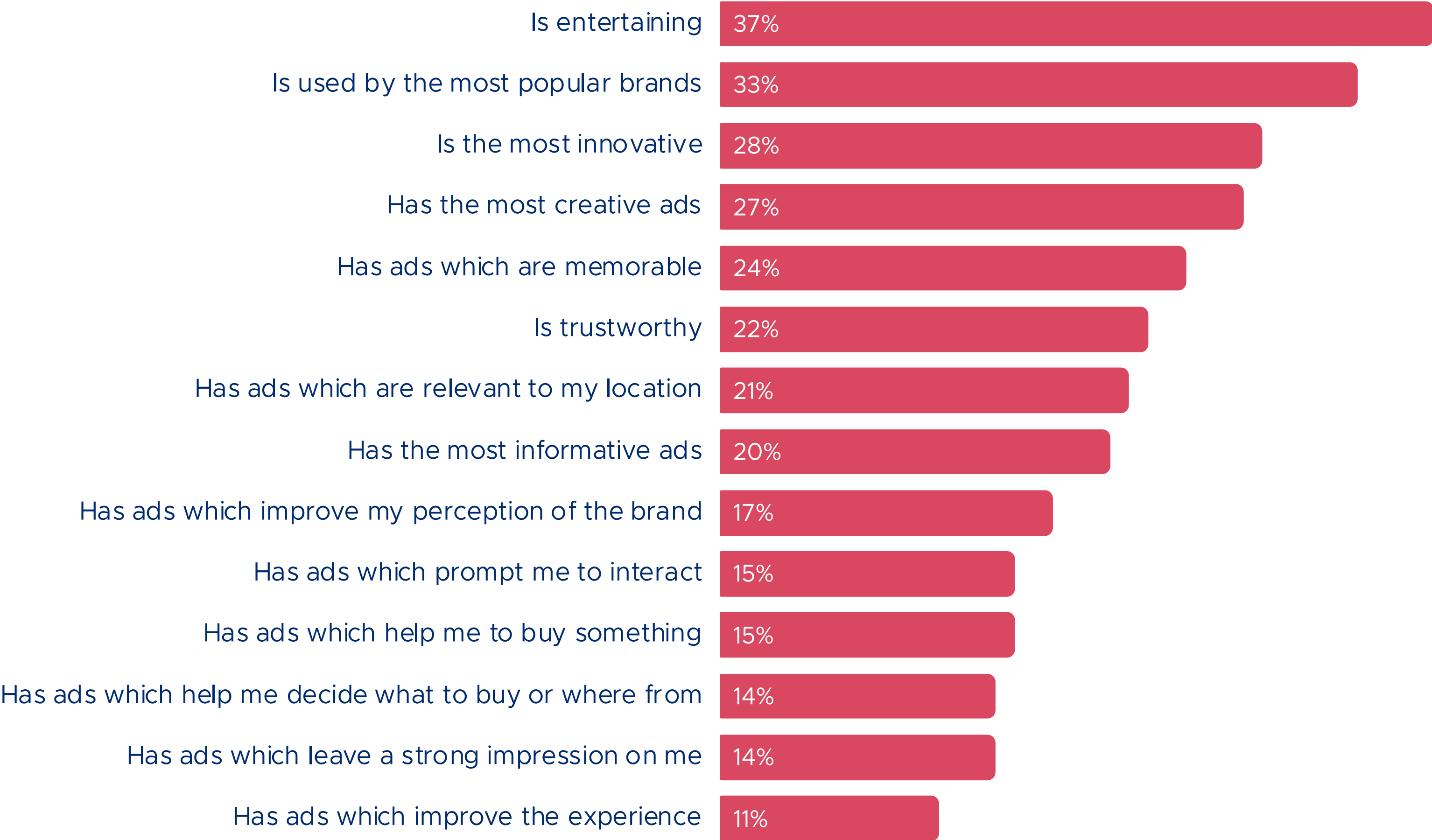


ACTIONABLE

More than half of consumers say that DOOH gives them the information they need to make a purchase and even drives them to make purchases, often directly from the ads themselves.



CONSUMER PERCEPTION: RANKING THE ATTRIBUTES OF DOOH



Consumers rank DOOH particularly high relative to other ad formats in these metrics:



ENTERTAINING



INNOVATIVE



CREATIVE



MEMORABLE



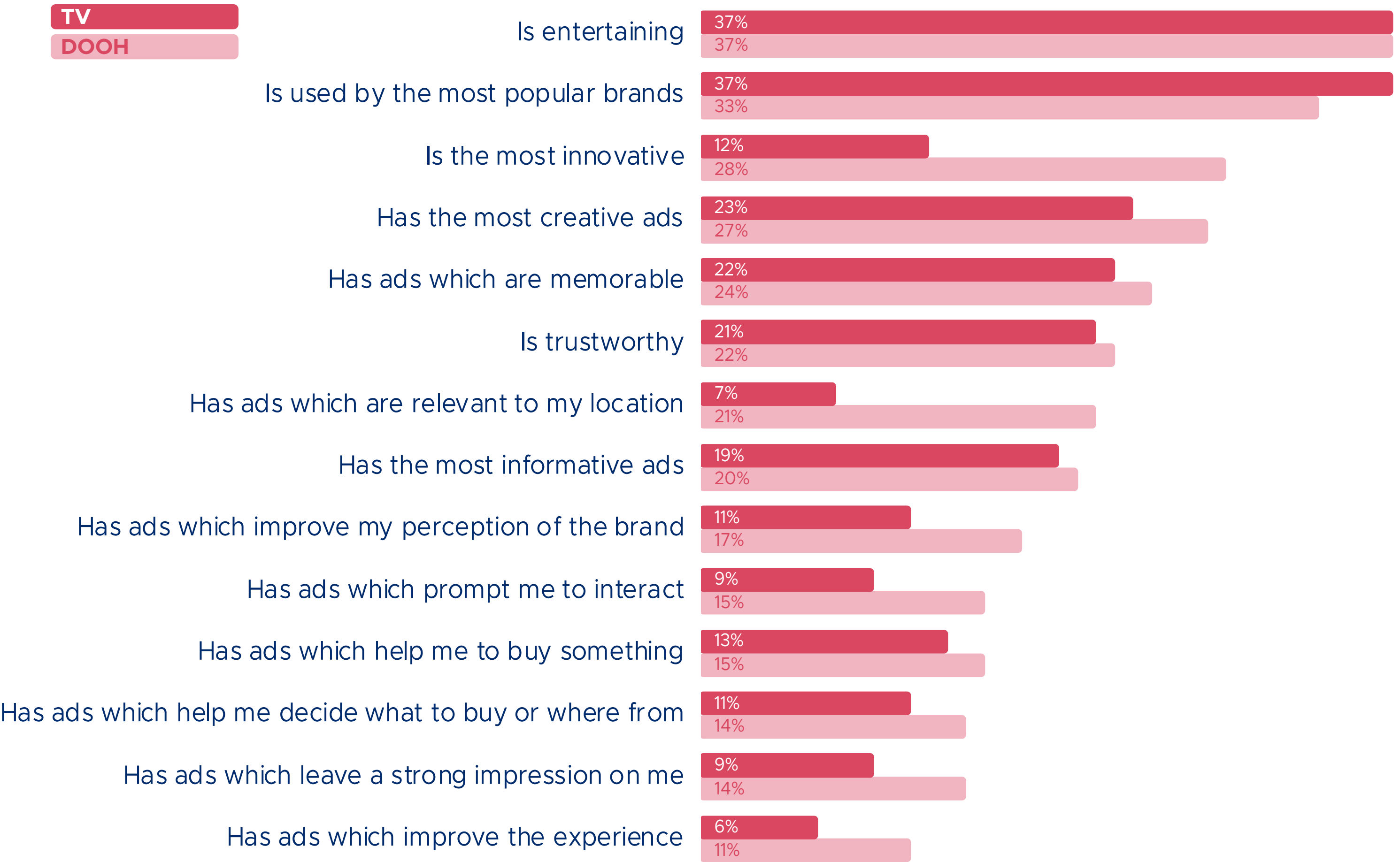
TRUSTWORTHY



RELEVANT TO
THE LOCATION

DOOH vs. TV

ADS THAT RUN WITH TV SHOWS



Consumers rated DOOH notably higher than TV in these metrics:



INNOVATIVE

+16%



RELEVANT TO THE LOCATION

+14%



IMPROVED PERCEPTION OF THE BRAND

+6%



PROMPTED INTERACTION

+6%



LEFT AN IMPRESSION

+5%



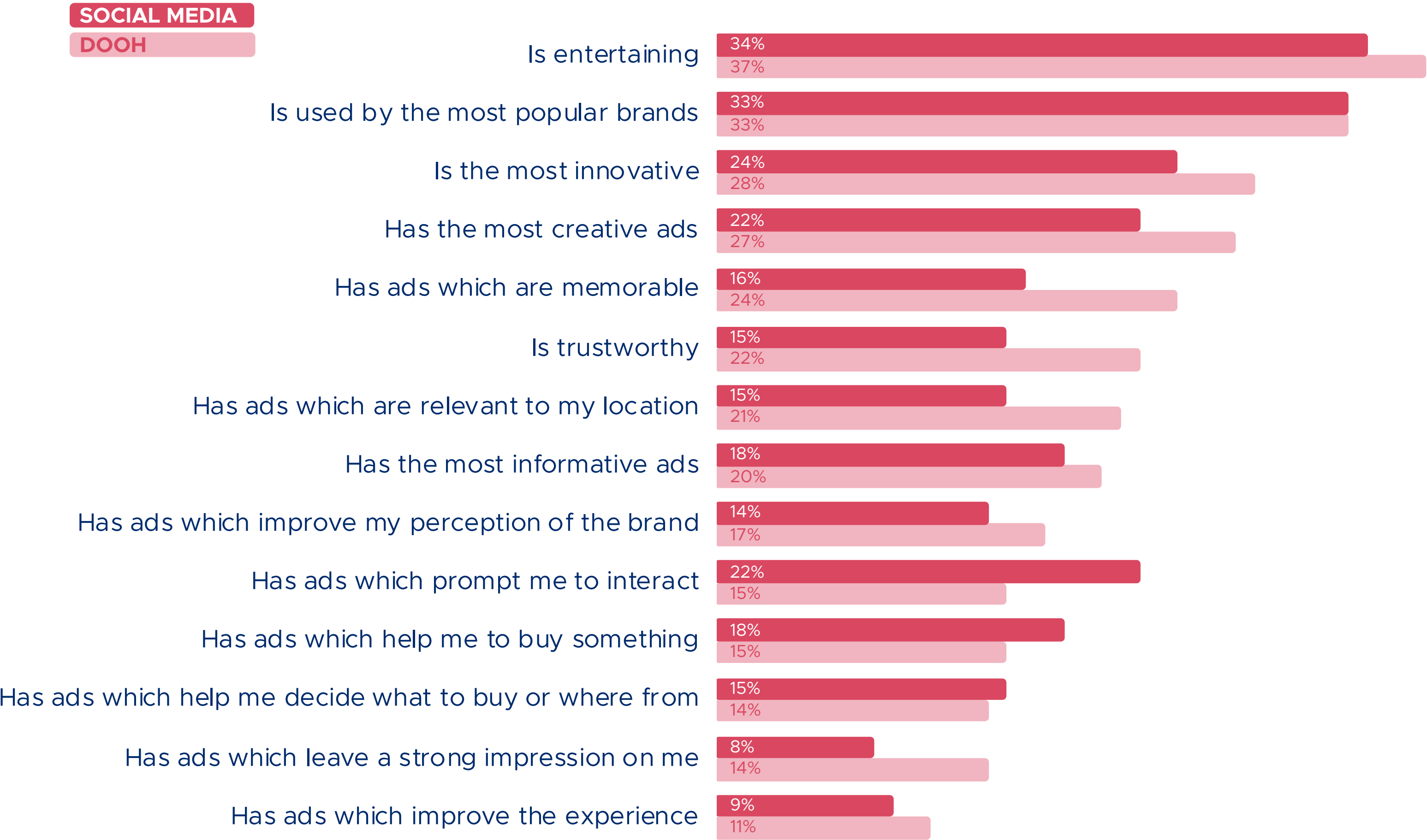
IMPROVED THE EXPERIENCE

+5%

Q3: We are going to show you a list of statements that other people have made about different advertising formats. For each format we show you, please select the statements that you believe apply.
Base: All users - Digital Billboard/Outdoor ads (4590), TV ads (3846)

DOOH vs. SOCIAL MEDIA

ADS IN STORIES & NEWS FEEDS



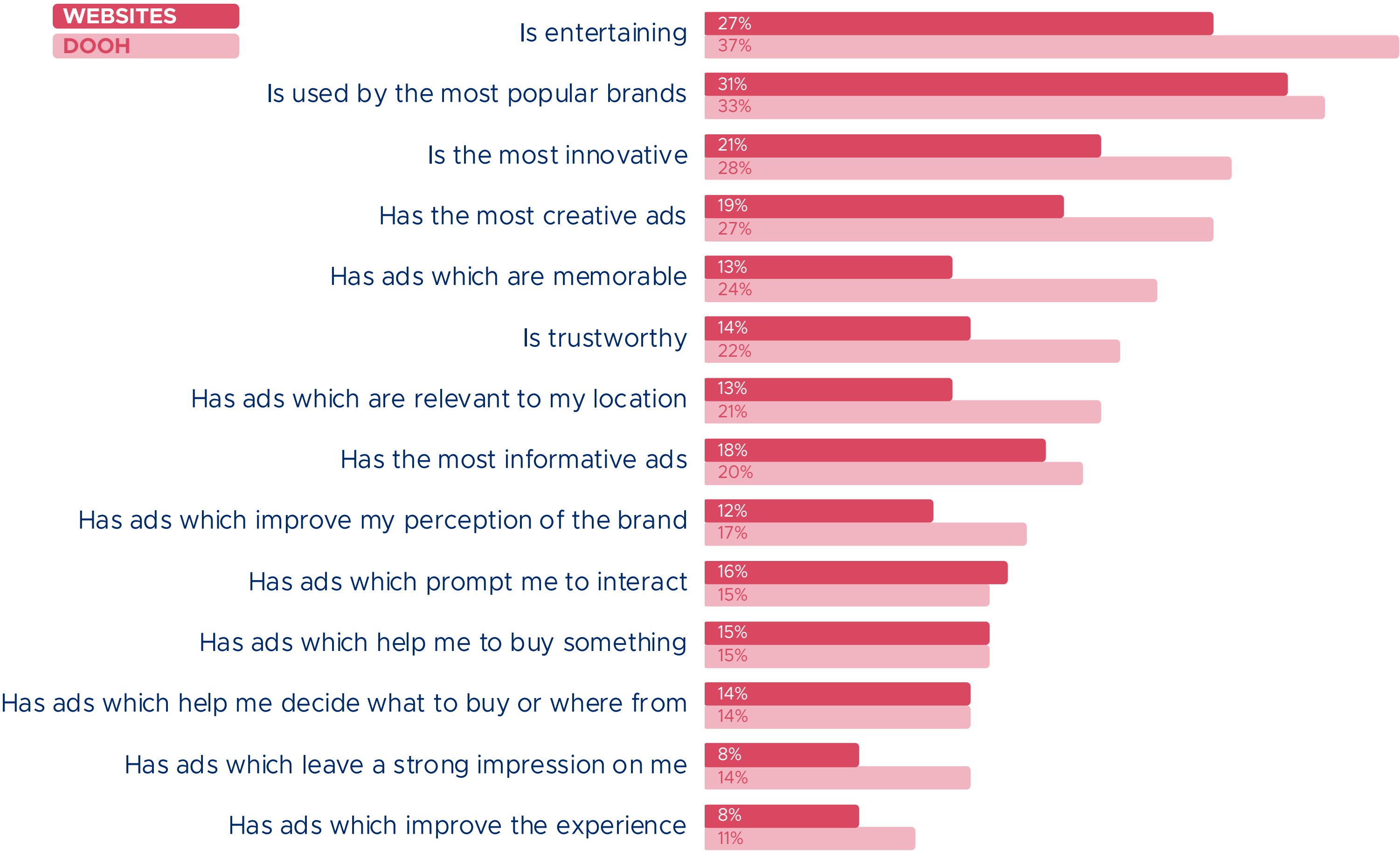
Consumers rated DOOH notably higher than social media in these metrics:



Q3: We are going to show a list of statements that other people have made about different advertising formats. For each format we show you, please select the statements that you believe apply.
Base: All users - Digital Billboard/Outdoor ads (4590), Ads in social media stories or news feeds (2444)

DOOH vs. WEBSITES

ADS DISPLAYED ON WEB PAGES



Consumers rated DOOH notably higher than websites in these metrics:



MEMORABLE

+11%



ENTERTAINING

+10%



RELEVANT TO THE LOCATION

+8%



CREATIVE

+8%



TRUSTWORTHY

+8%



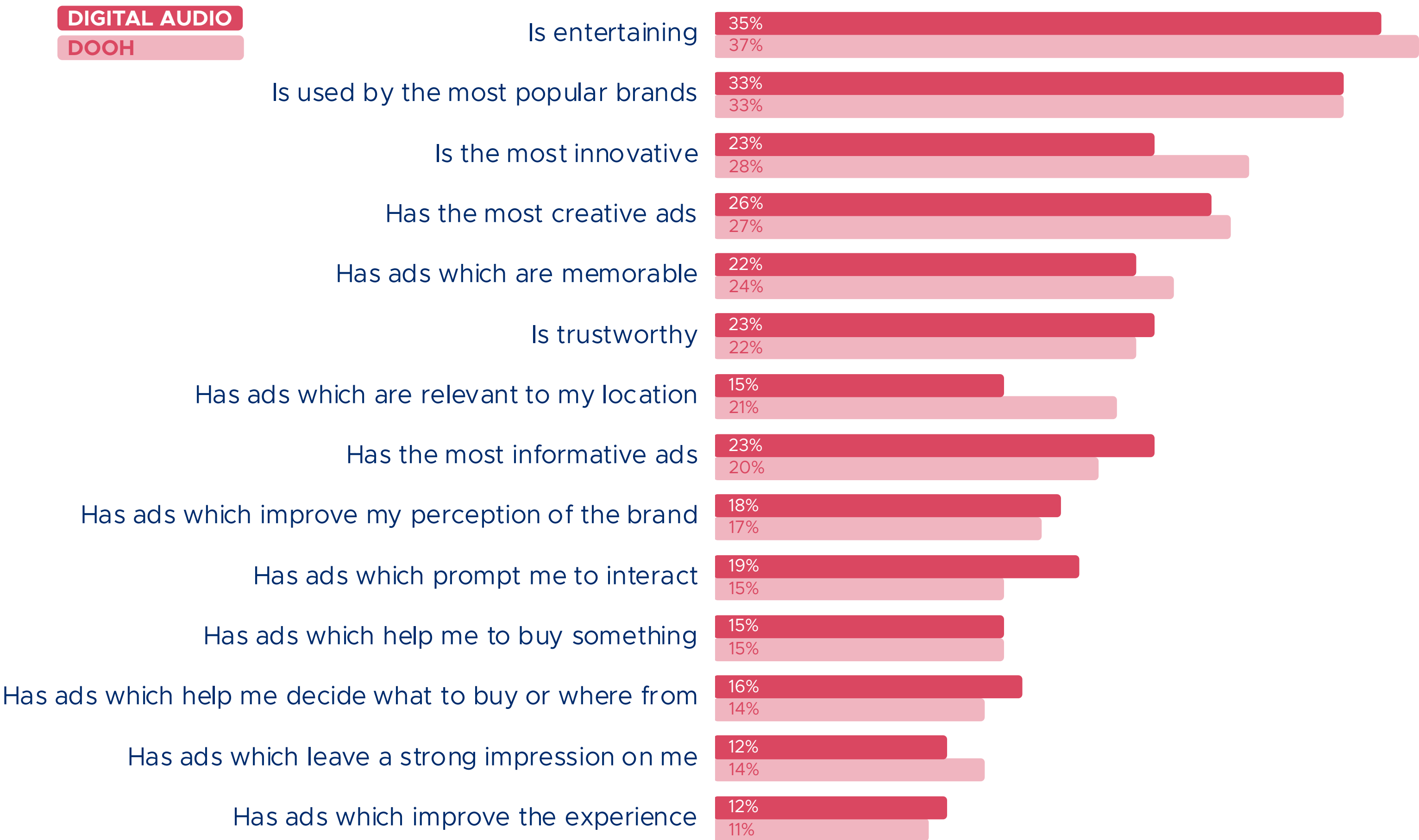
INNOVATIVE

+7%

Q3: We are going to show a list of statements that other people have made about different advertising formats. For each format we show you, please select the statements that you believe apply.
Base: All users - Digital Billboard/Outdoor ads (4590), Ads on websites (2493)

DOOH vs. DIGITAL AUDIO

ADS IN STREAMING MUSIC & PODCASTS



Consumers rated DOOH notably higher than digital audio in these metrics:



RELEVANT TO THE LOCATION

+6%



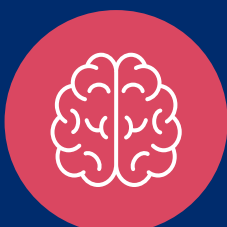
INNOVATIVE

+5%



ENTERTAINING

+2%



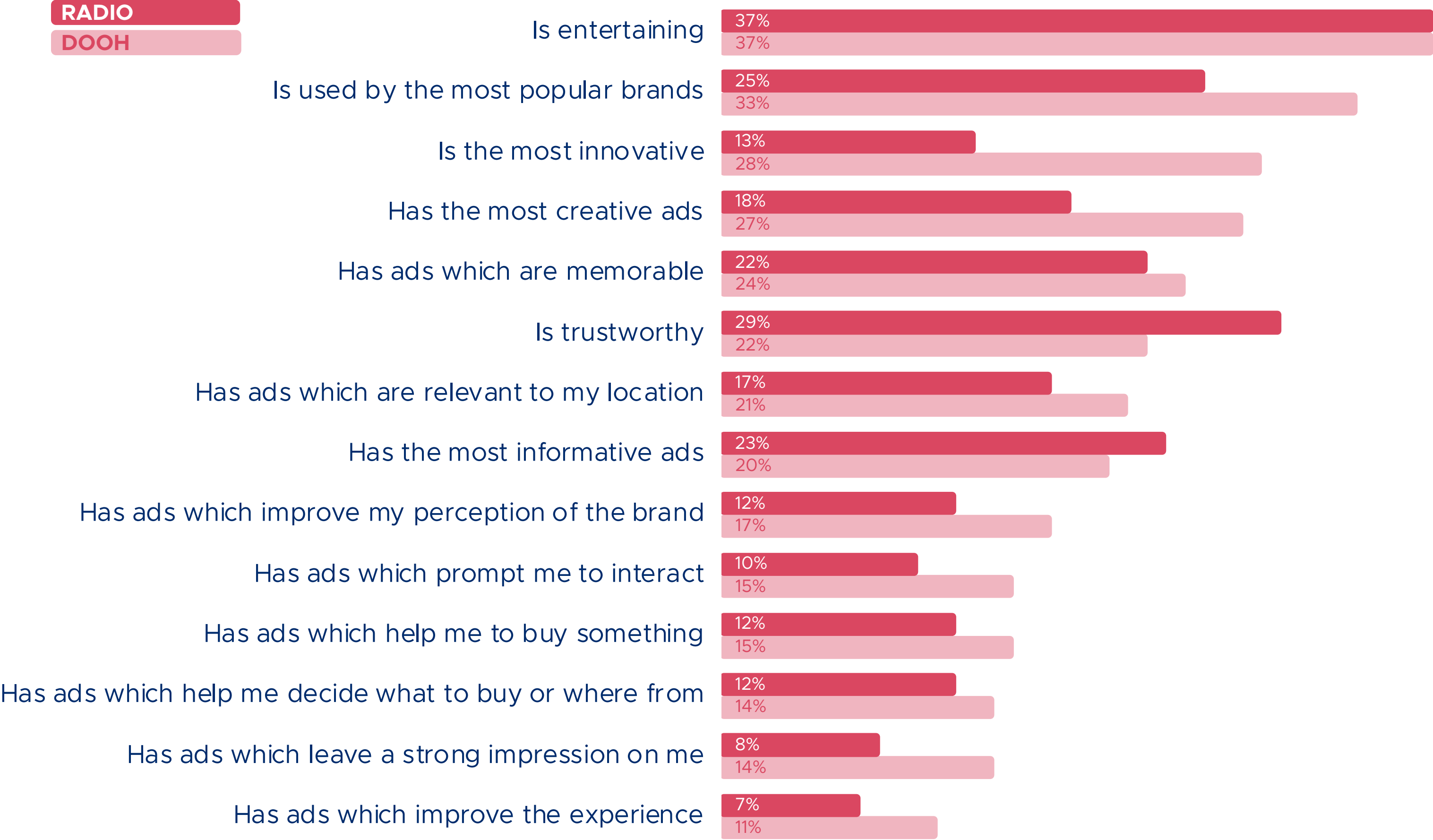
MEMORABLE

+2%

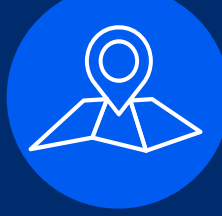
Q3: We are going to show a list of statements that other people have made about different advertising formats. For each format we show you, please select the statements that you believe apply.
Base: All users - Digital Billboard/Outdoor ads (4590), Ads in digital streaming music services/podcasts (2416)

DOOH vs. RADIO

ADS THAT AIR WITH RADIO PROGRAMS



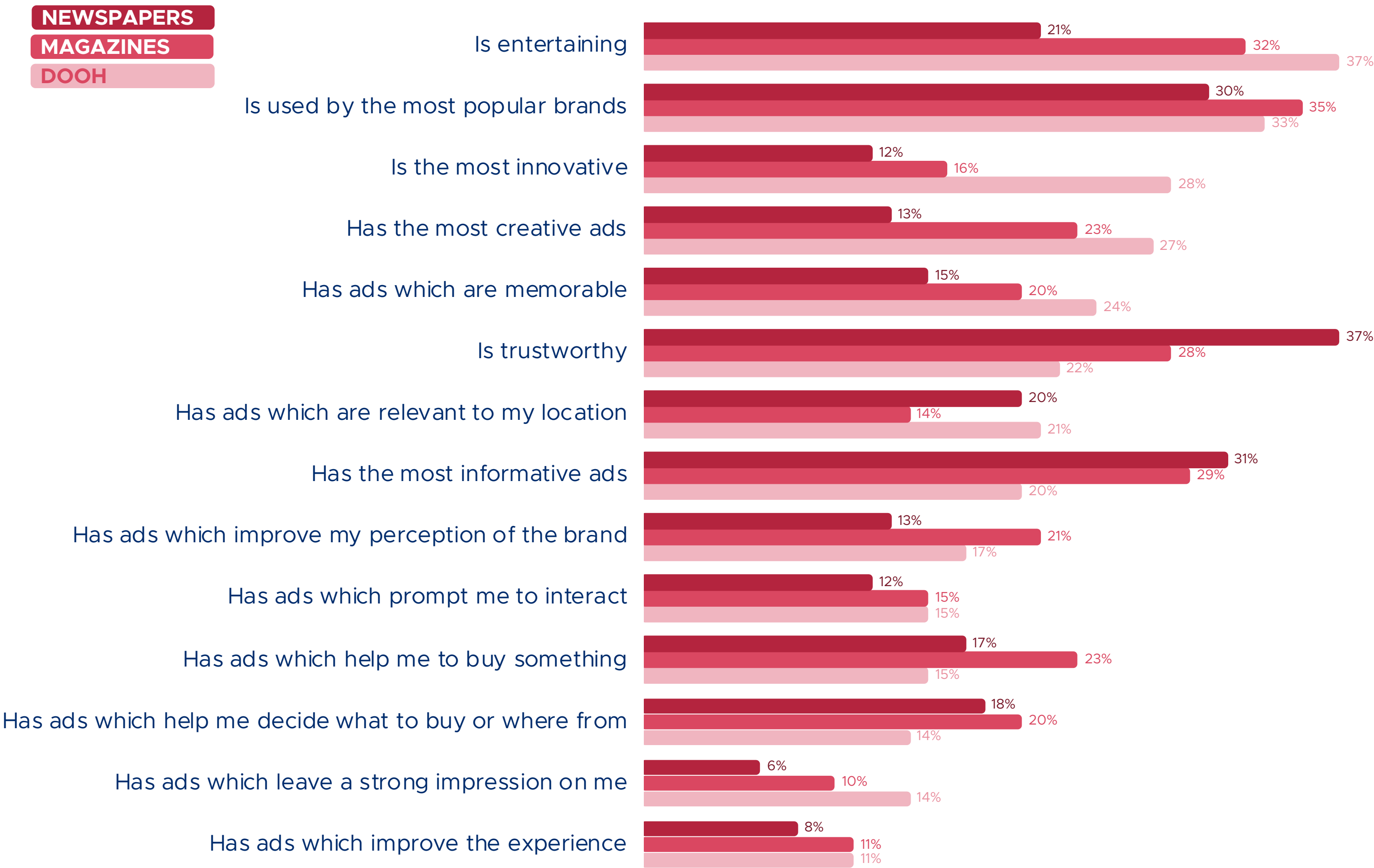
Consumers rated DOOH notably higher than radio in these metrics:

-  **INNOVATIVE** **+15%**
-  **CREATIVE** **+9%**
-  **USED BY POPULAR BRANDS** **+8%**
-  **LEFT AN IMPRESSION** **+6%**
-  **PROMPTED INTERACTION** **+5%**
-  **RELEVANT TO THE LOCATION** **+4%**

Q3: We are going to show a list of statements that other people have made about different advertising formats. For each format we show you, please select the statements that you believe apply.
Base: All users - Digital Billboard/Outdoor ads (4590), Radio Ads (2365)

DOOH vs. PRINT MEDIA

ADS IN NEWSPAPERS & MAGAZINES



Consumers rated DOOH notably higher than print media in these metrics:



ENTERTAINING
(VS. NEWSPAPERS)

+16%



CREATIVE
(VS. NEWSPAPERS)

+14%



INNOVATIVE
(VS. MAGAZINES)

+12%



MEMORABLE
(VS. NEWSPAPERS)

+9%



LEFT AN IMPRESSION
(VS. NEWSPAPERS)

+8%



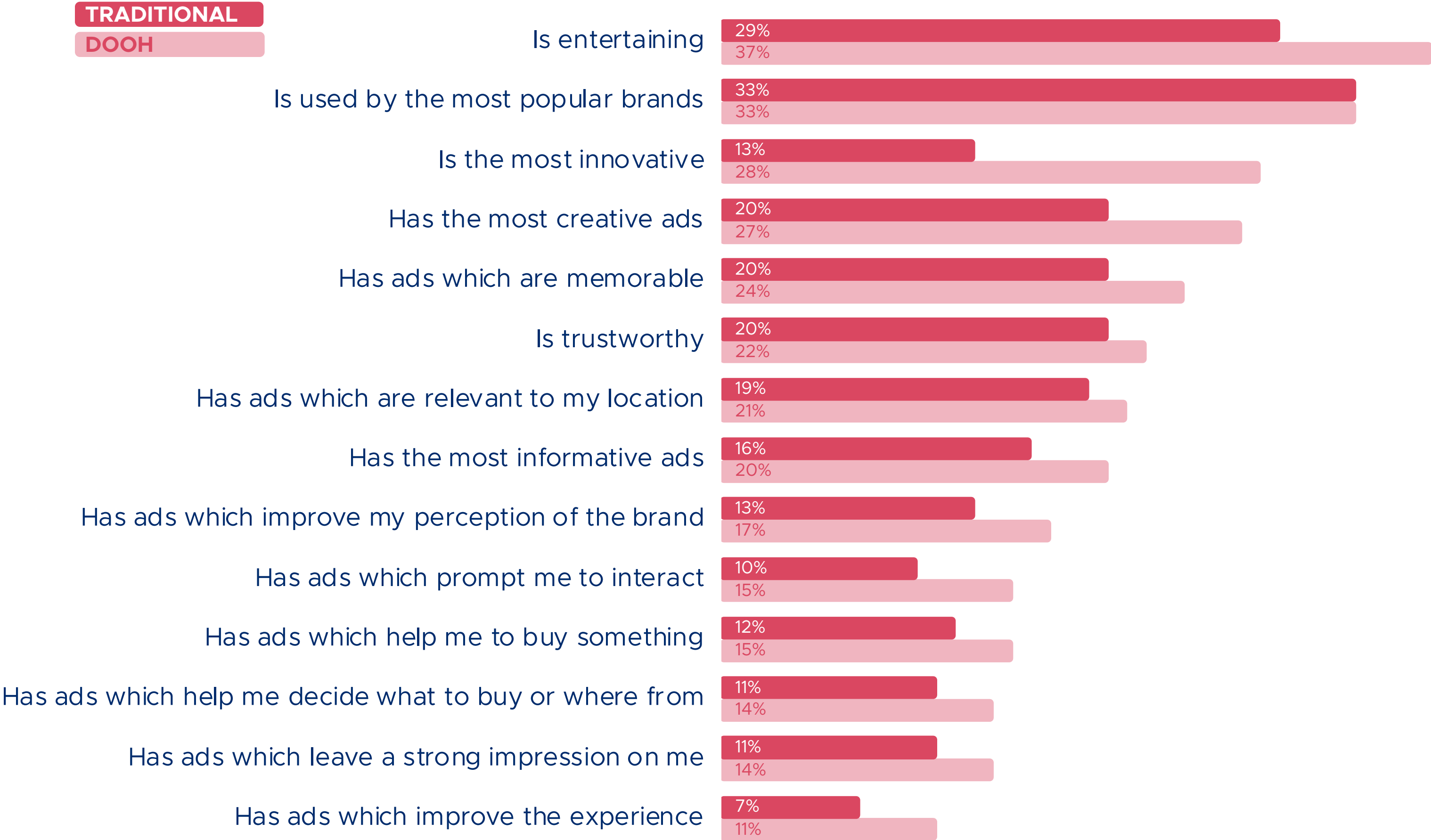
RELEVANT TO THE LOCATION
(VS. MAGAZINES)

+7%

Q3: We are going to show a list of statements that other people have made about different advertising formats. For each format we show you, please select the statements that you believe apply.
Base: All users - Digital Billboard/Outdoor ads (4590), Newspapers ads (2137), Magazine ads (2118)

DOOH vs. OUT-OF-HOME

TRADITIONAL OUTDOOR ADS



Consumers rated DOOH notably higher than traditional out-of-home in these metrics:



Q3: We are going to show you a list of statements that other people have made about different advertising formats. For each format we show you, please select the statements that you believe apply.
Base: All users - Digital Billboard/Outdoor ads (4590), Billboard/Outdoor ads (5254)

CONCLUSION

THE
DOOH
DIFFERENCE

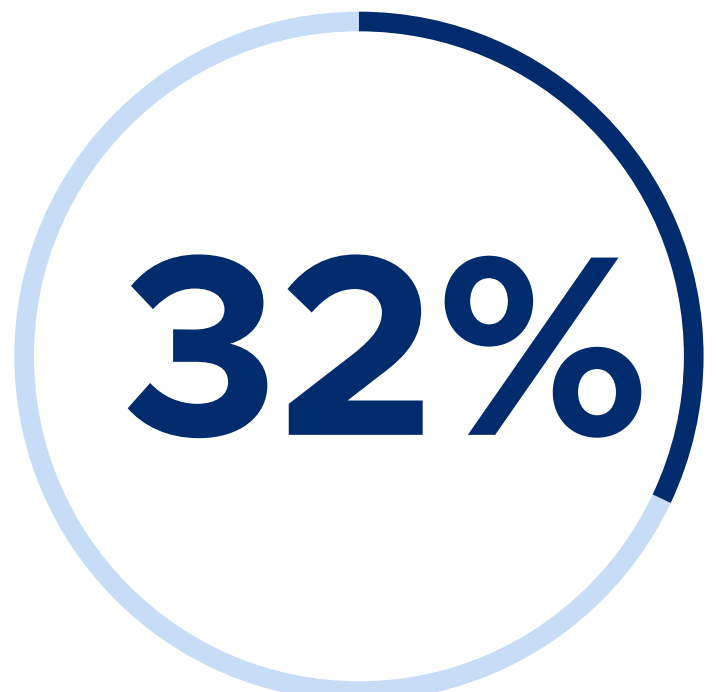
CONSUMERS LIKE, TRUST AND ENGAGE WITH DOOH

In many key categories, our survey indicates that consumers around the globe perceive DOOH as equivalent to or even exceeding other popular channels, including TV, online video, and social media. They like, trust, and engage with DOOH and find it enhances their surroundings, often offering a favorable assessment of DOOH relative to marketers.



63%

of consumers say it makes their journey more interesting



32%

of marketers are unaware of the performance attribution capabilities of DOOH

MARKETERS ARE INCREASING DOOH BUDGETS

Marketers, meanwhile, consider DOOH a core format for consideration for significant budget within media plans. They cite improved abilities to integrate, measure, and guide DOOH during media campaigns, especially through programmatic platforms through which they're conducting other parts of their digital media campaigns.

Marketers also say that the significant investment they plan to put into DOOH is driven by programmatic enablement, the ability to target, and the newly enhanced capabilities of DOOH screens. These include location targeting, the ability to dynamically adjust creative in close to real time, and the capacity to allow consumers to interact via their handheld devices.

DOOH offers digital channel synergy, precision, efficiency, a lower investment bar for entry relative to available reach and scale, and an ease of providing richer creative experiences for consumers. Marketers can also use DOOH to amortize media buys that include television, an arena that has recently seen inventory scarcity and price hikes.

“

Receptiveness to DOOH ads is clearly strong among consumers everywhere, as seen through their positive attitude towards its quality and innovation. As a non-interruptive channel, the survey findings seem to endorse our view that DOOH offers advertisers a unique opportunity to engage their audiences with high-impact and highly relevant messages in spaces where those messages are welcomed by consumers. It offers a large creative canvas but also gives ad buyers the precision planning ability and agility of digital, programmatic media, as well as a powerful location-based element that drives a multitude of actions. The survey findings also validate our view that DOOH does not replace existing forms of ad media but adds its own unique and complementary value for marketers.

AKAMA DAVIES

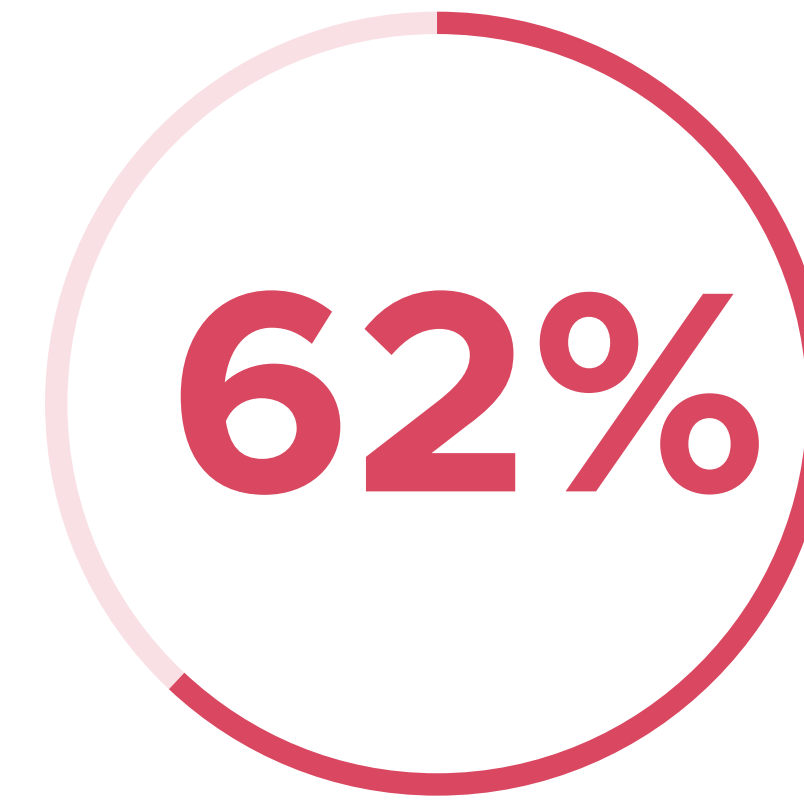
GLOBAL PRACTICE LEAD, DOOH, XAXIS

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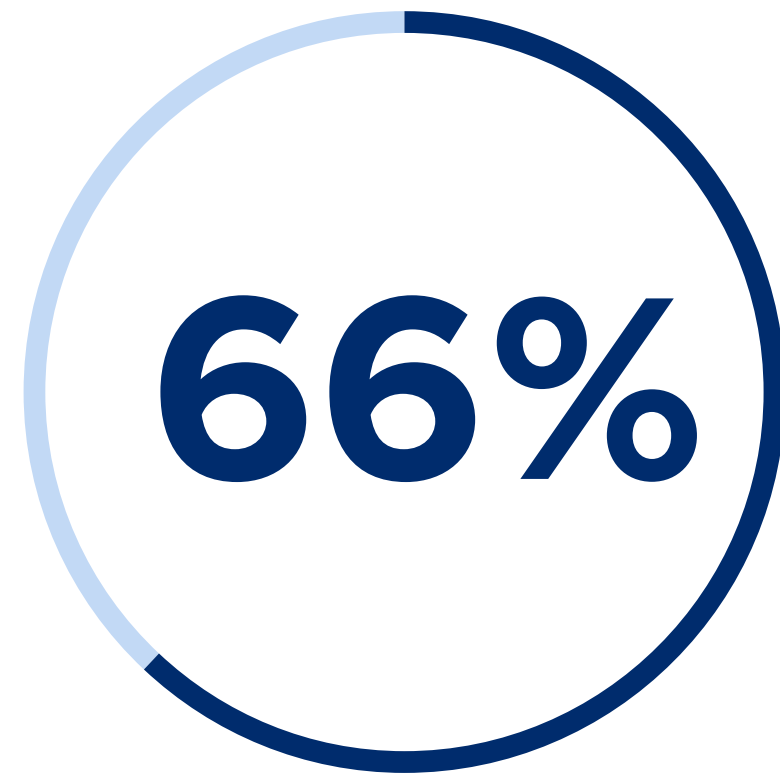


DOOH OFFERS REACH AND OMNICHANNEL PERFORMANCE

Further driving investment among marketers is the ability to measure DOOH via omnichannel and multitouch attribution models, giving them further data and ability to analyze the effect the DOOH advertising has in the context of their entire media buys.



of marketers see DOOH as an important screen in integrated omni-video campaigns



of omni-digital decision-makers activated new DOOH campaigns within the last 18 months

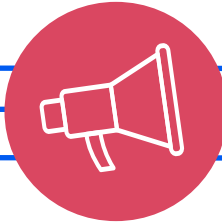
DOOH OFFERS A SUPERIOR COMBINATION OF BROAD-REACH MEDIA

DOOH advertising offers a superior combination of broad-reach media that provides the high-impact effects of traditional media formats along with the interactivity, targeting, buying efficiency, and omnichannel and measurement capabilities that all of the most prominent digital channels afford. Separate research conducted with marketers by the DPAA finds that DOOH bolsters many other channels when used in conjunction with them, leading to a positive impact on business outcomes. It could even be said that an absence of DOOH in a brand's broad media strategy may limit the potential performance of other digital channels.

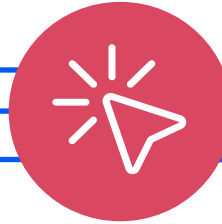
IN REVIEW:



DOOH is seen favorably by marketers who are eager to utilize its advancing capabilities and availability across the globe.

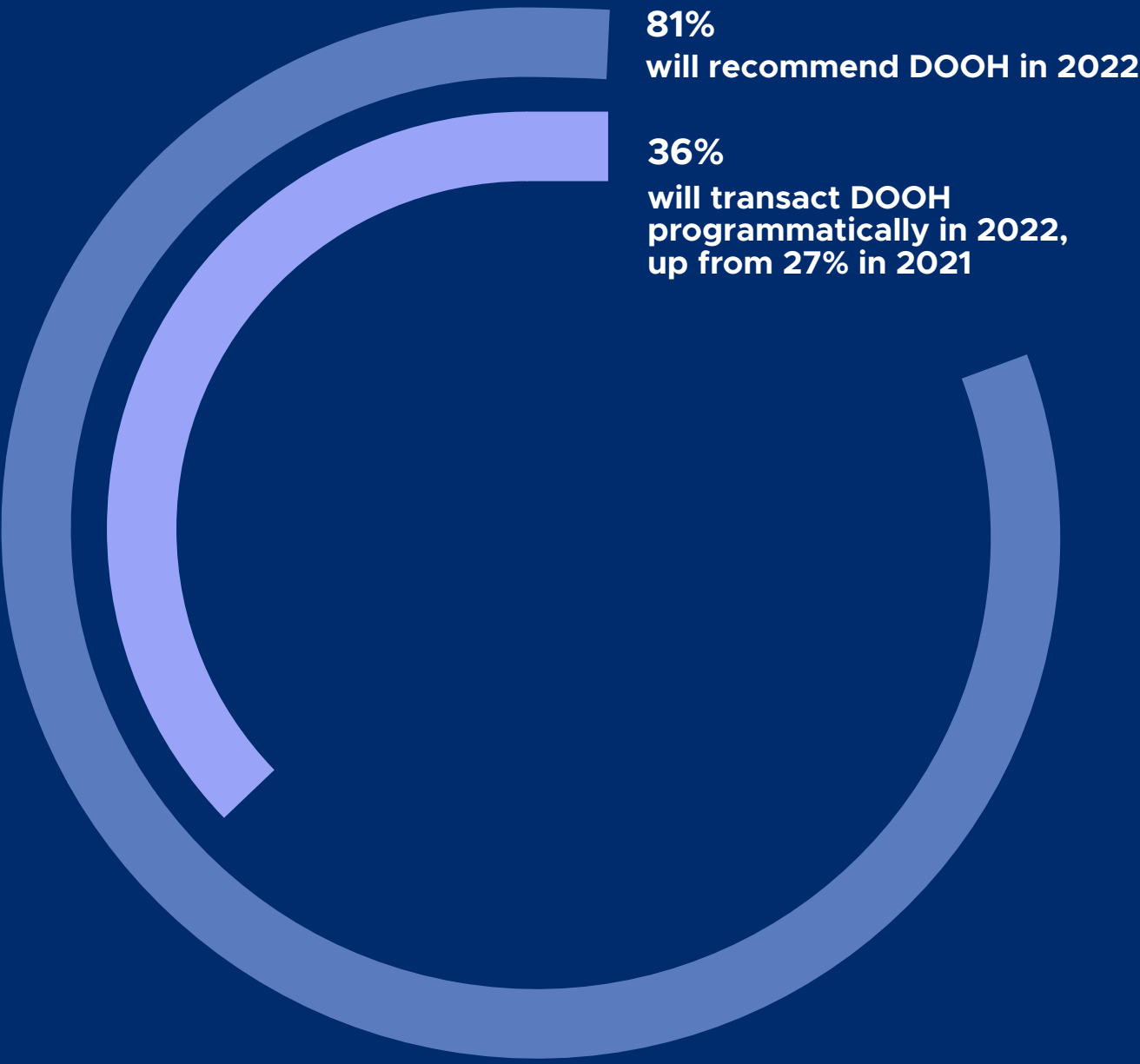


DOOH boosts other advertising channels and has a multiplier effect on those channels' impact.

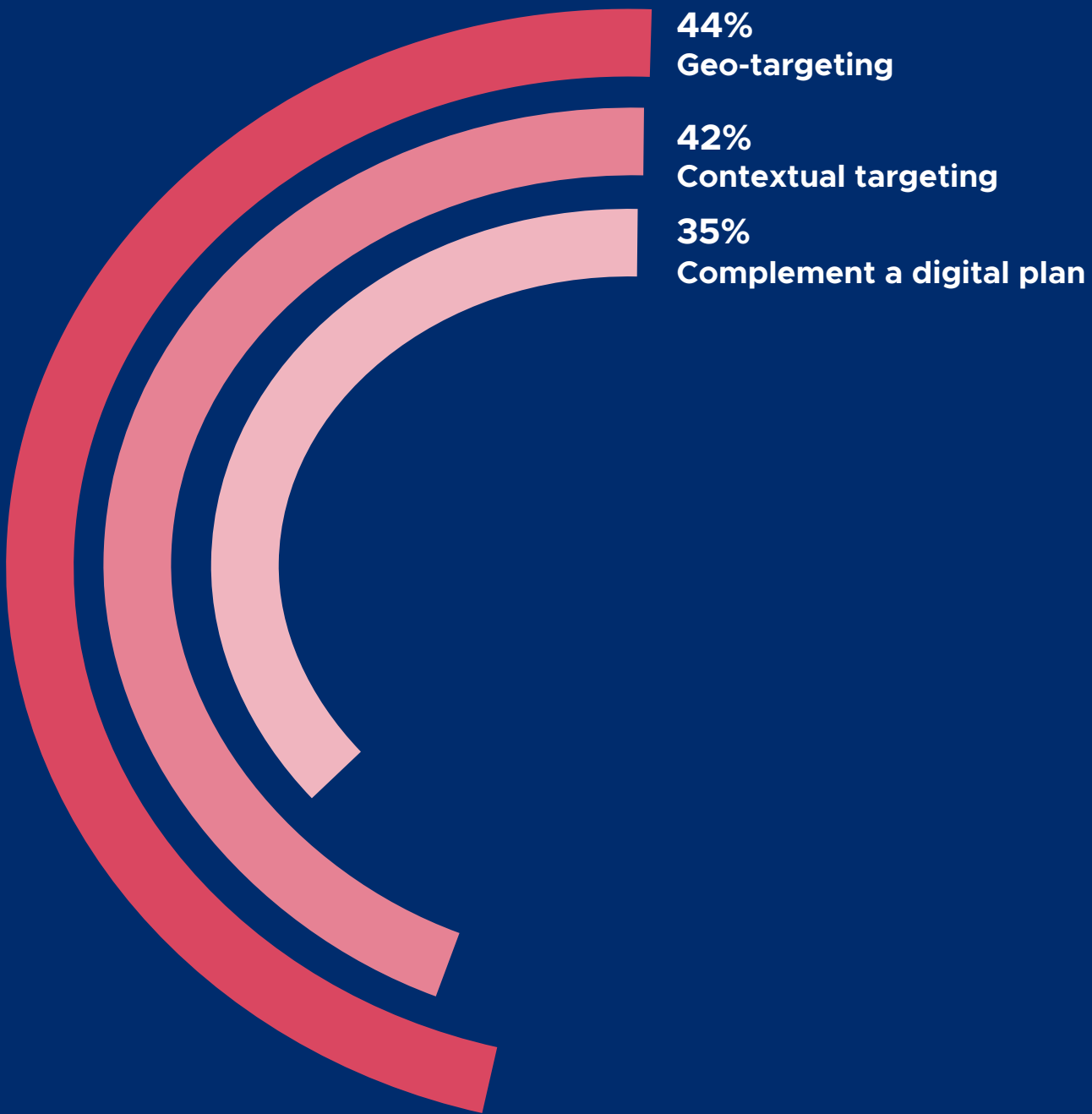


DOOH is seen favorably by consumers and inspires consumer actions, behaviors, and sentiments that help improve business outcomes.

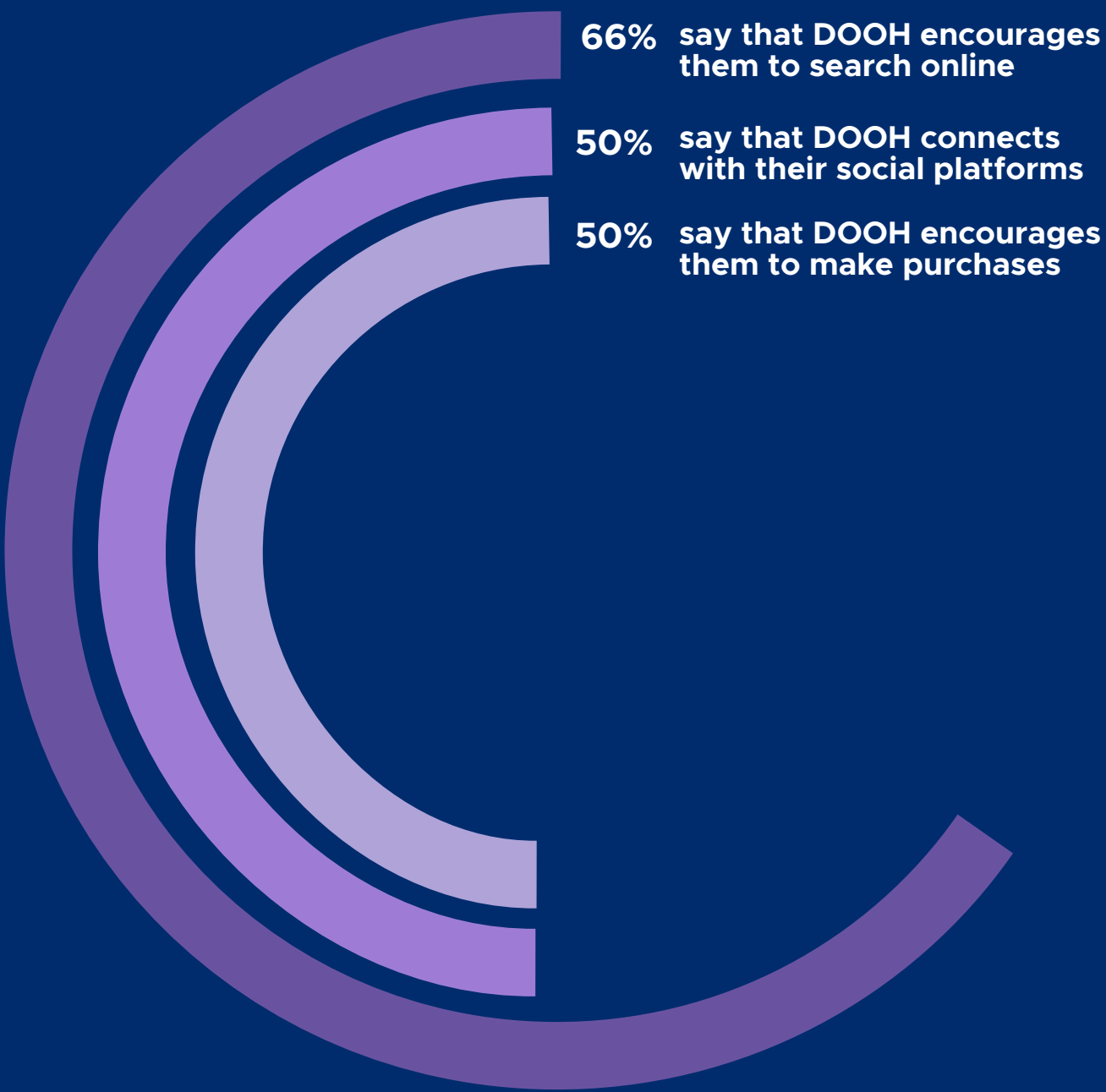
AMONG MARKETERS:



TOP WAYS MARKETERS USE DOOH:



AMONG CONSUMERS:



ADDITIONAL SOURCES:

“Akama Davies: Something old, something new: How digital-first brands can thrive in out-of-home,” New Digital Age

<https://newdigitalage.co/programmatic/akama-davies-something-old-something-new-how-digital-first-brands-can-thrive-in-out-of-home/>

“The OOH transformation: From manual to omnichannel,” Xaxis 2021

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“Media Decision Makers Study, 2H 2021,” DPAA & Xaxis

<https://www.xaxis.com/annual-digital-out-of-home-dooH-media-buyers-study/>

FOR MORE INFO:

www.xaxis.com/sightline

www.kineticww.com/sightline



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