



HivestackTM



DO OH

**Trends and
Predictions**



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Welcome to the **enrichment** era of digital out of home

Another year brings another opportunity to reflect on the incredible advancements we've made as an industry. Although relatively new compared to other advertising channels, digital out of home (DOOH) has not only proven its resilience and agility in the face of significant challenges, but it hasn't wavered when presented with **opportunities to adapt, innovate and grow**.

After setting a strong foundation and seeing a surge in trust and adoption, 2024 will be the year a **more mature, sophisticated and dynamic DOOH** takes center stage.

Discover our annual predictions for the year ahead.





Seamless Omnichannel Integration

In today's dynamic marketing landscape, the integration of DOOH within a larger omnichannel marketing mix has emerged as a powerful strategy. Instead of each channel operating in silos, an omnichannel inclusive approach allows brands to create **a comprehensive and cohesive canvas** for storytelling, performance marketing and attribution within one strategy, one plan and one execution - and in many cases, all from one platform.

DOOH is a bold, dynamic, unmissable and unskippable format that provides a unique opportunity that sits at the intersection of data and creativity. By integrating DOOH within a broader marketing strategy, brands can ensure **a consistent and immersive storytelling experience** across various touchpoints. Whether it's location-based DOOH or any of the various DOOH venue types, audio OOH, connected TV, social media, or digital display advertising, a cohesive message enhances brand recall and fosters a deeper connection with audiences.

The integration of programmatic DOOH with performance marketing channels also adds **a new layer of precision to campaign execution**. Real-time data and analytics from

DOOH campaigns can be synchronized with other digital channels, enabling marketers to optimize strategies on the go. This integration allows for dynamic content delivery based on factors like location, time and audience behavior, maximizing the relevance and impact of an advertising campaign.

One of the challenges in marketing has been the attribution of success to specific channels. Integrating DOOH with other marketing channels allows for a more accurate attribution model by providing **a holistic view** of the customer journey. Data points from DOOH campaigns can be correlated with online and offline touchpoints, offering a clearer understanding of how each channel contributes to the overall conversion funnel.

Looking ahead, we predict omnichannel advertising will become even more advanced, further enhanced by data and AI-powered capabilities creating seamless and effortless experiences growing DOOH's role as **a bridge between the physical and the digital ecosystems**. An omnichannel approach is no longer optional for savvy marketers - it's now an essential strategy to drive success.



Standardized Measurement

DOOH advertising has experienced significant growth in recent years, fueled by advancements in technology and the increasing integration of digital screens in public spaces. As advertisers allocate more budget to DOOH campaigns, the need for accurate and standardized measurement methodologies has become a necessity.

That necessity is rooted in the importance of providing advertisers with a common language to evaluate the performance of their DOOH campaigns. This not only facilitates better decision-making, but also fosters trust between advertisers and media owners. Additionally, consistent metrics enable benchmarking and comparison across different campaigns, platforms and locations. Here are some key reasons we anticipate the need for increased standardization in 2024:

Transparency: Transparency in reporting and analytics - this is crucial for building trust in the industry and fostering better relationships between advertisers and media owners.

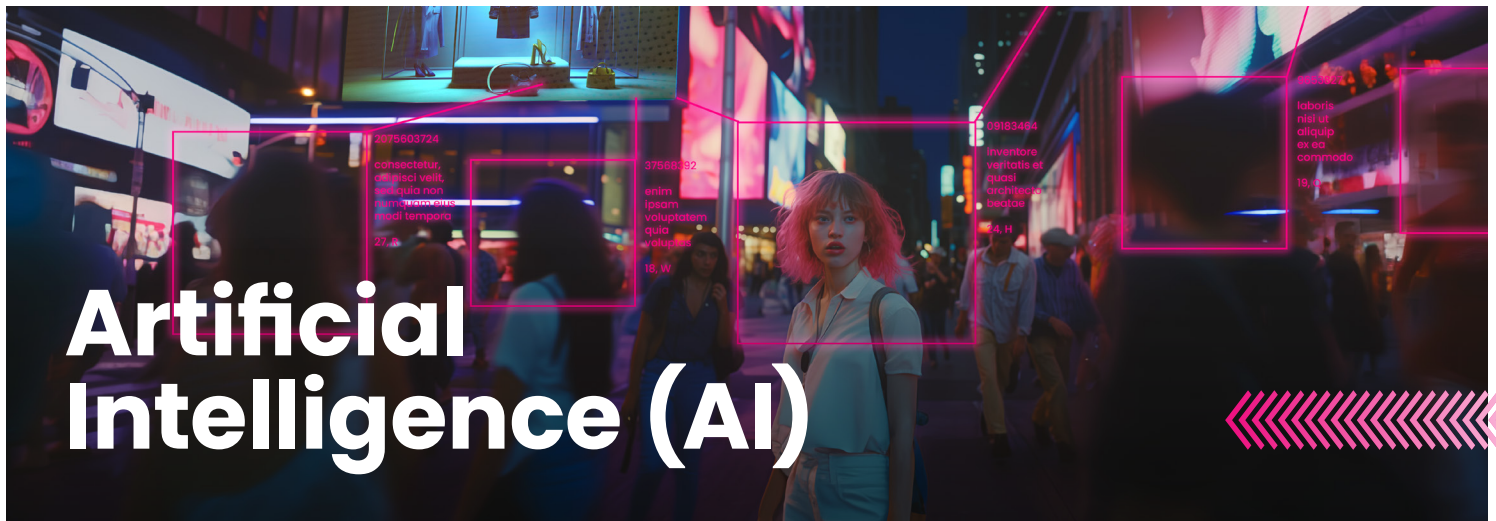
Calculating ROI: Advertisers invest significant resources in DOOH campaigns and they need to understand the return on investment (ROI). A common set of metrics to evaluate campaign success allows for a more accurate calculation of ROI.

Increased adoption and growth of the industry: When there are consistent and reliable metrics, advertisers are more likely to invest in DOOH campaigns, leading to broader adoption of DOOH and innovation in the sector.

Improving campaign effectiveness: This also allows advertisers to more effectively analyze the performance of different creative elements, messaging strategies, and targeting approaches. This information can be used to optimize future campaigns for better results.

The demand for standardized measurement methodologies within DOOH reflects the maturation of this dynamic and rapidly growing channel. Advertisers, media owners and industry associations are working collaboratively to establish common metrics that enhance transparency and accountability. As these frameworks become more widely adopted, we expect to see the DOOH landscape to evolve further in 2024.





Artificial Intelligence (AI)

It is an understatement to say that AI has been a popular topic at every industry event this year but the question remains; how is AI being applied to the DOOH space? Although there are some pretty cool use cases for AI in wider marketing creative disciplines, the core principles of machine learning and programmatic modeling are quite similar. In reality, we are still in the early stages of AI's true application to DOOH, but here is an overview of what conversations are happening around AI across DOOH and where we see it going:

Visual & graphic design: Some of the earliest advancements to AI that came to market were its applications for visual and graphic design. Notable solutions that are readily available include tools that enable automation such as resizing and formatting at scale and creative tools that leverage generative machine learning models to help streamline processes. In the coming year, we expect to see advancements to AI when applied to creative production and dynamic creative optimization (DCO). This will provide more accessible and effective solutions to reach audiences out of the home with contextually relevant assets. This is a very promising area of growth and likely the most accessible aspect of AI for our industry at this time.

Education & readiness: There is a huge emphasis on education and understanding. This is true for not only the immediate opportunities that AI will provide our industry, but also the larger implications and future impacts. Within the advertising community, we are seeing both excitement and hesitation at the same time. There is a lot of curiosity around AI tools and models that can drive efficiencies or provide

organizations with more autonomy vs outsourcing. There are also a fair amount of questions around diligence and transparency. At the core of the discussion is the need to be open and transparent around what AI tools we are using, but also to be open minded to learning new skills and adopting new technologies.

Technological innovation: Most of the technological developments are primarily focused around driving efficiencies across data & analytics, consumer or client relationship management (CRMs) and, of course, advertising technology products and platforms. One opportunity is how AI can power programmatic capabilities or enable the analysis of large amounts of data for better precision in audience targeting. Additional areas that hold potential include big data analysis & predictive analytics, campaign interactivity & optimization and centralization or coordination of omnichannel campaigns. Since AI has become a very popular term, there are instances where related principles are being confused with true AI. It's important to ask questions and decipher what's beneath the surface.

The demand for AI is there, no question, but the key takeaway is that there is a responsibility across the entire industry to ensure that ethics and integrity are not compromised within its application. We are just at the very beginning and can predict that AI will continue to be a very big conversation in the coming years.

The Diversification of Screens

DOOH advertising is a truly transformative and adaptable channel, evolving from static billboards to dynamic, interactive screens that engage audiences in unprecedented ways. As technology continues to advance, the possibilities for creative and interactive content on DOOH screens are expanding, presenting advertisers with new and exciting opportunities to connect with their target audiences.

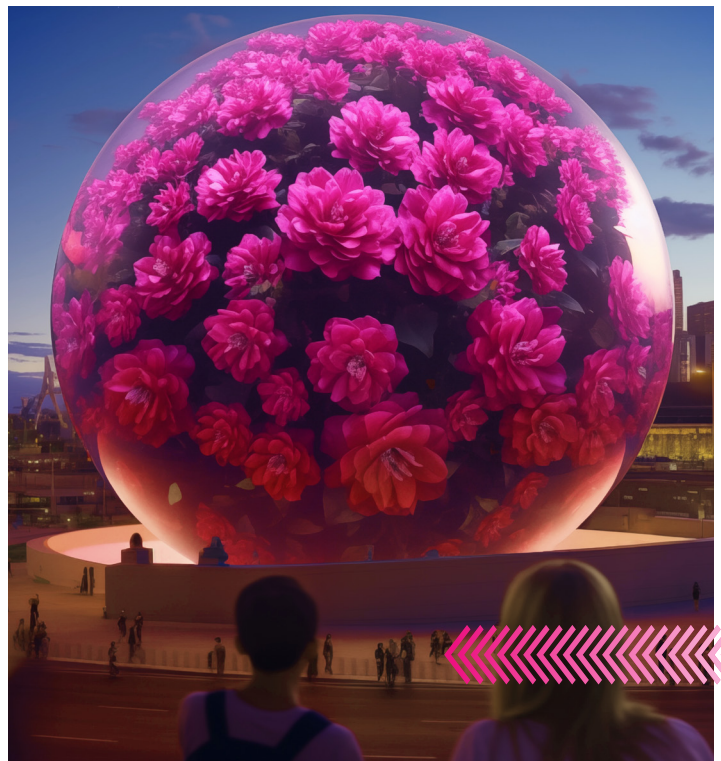
The history of DOOH dates back to the early 2000s when digital screens started replacing traditional static billboards. The initial focus was on delivering dynamic and eye-catching content, but the real game-changer came with the integration of technologies like LED, high-resolution displays, and of course, programmatic functionality. These advancements allowed advertisers to deliver more targeted and timely messages to consumers. But the real question remains: what can brands and agencies do in 2024 to keep the attention of their target audiences exactly where they want them?

“Spectacular” boards get more spectacular

In today’s fast-paced world, attention spans are shorter, expectations are higher and that isn’t likely to change anytime soon. One of the most significant shifts in the DOOH landscape has been the move towards spectacular interactivity. What advertisers need to remember is whether it be holograms, or new cutting-edge displays, screens aren’t just billboards; they can become immersive experiences, leveraging technology to captivate viewers and create a lasting impression.

The synergy between mobile and DOOH

The synergy between digital billboards and mobile devices is also advantageous to marketers. Spectacular boards often include



features that enable seamless integration with smartphones. QR codes, NFC technology and Bluetooth connectivity facilitate a direct link between an outdoor ad and the consumer’s mobile device, creating a bridge for further engagement and conversion.

Augmented reality (AR)

AR takes center stage in the realm of spectacular digital boards. By superimposing digital content onto the real world, advertisers create immersive experiences that captivate audiences. Whether it’s trying on virtual clothing, previewing products, or wowing audiences with anamorphic videos, AR adds a layer of excitement and enhancement for otherwise apathetic consumers.

All of this, whether it be a new type of format, a location, or even an experience, offers the gift of expanded creativity for brands and agencies. The evolution of DOOH screens from static displays to interactive, technologically advanced canvases reflects the dynamic nature of the advertising industry. From immersive content, the everlasting popularity of a QR code to bold spectaculars, DOOH screens are unmissable and seem to be the only medium worthy of a selfie.



Sustainability

As we move into 2024, sustainability remains a key priority for the advertising industry. The global challenge of achieving net zero emissions is met with a growing realization among businesses that they can, and must, play a pivotal role in **fostering positive change**. A notable shift is occurring within DOOH, with more intentional focus on greener alternatives that reduce environmental impact.

A shining example of positive change from this year was the utilization of energy grid data to optimize the timing of a campaign for [OVO Energy](#), running the ad only during periods of lower carbon emissions. This not only reflects **a commitment to responsible advertising**, but also acknowledges the important role of advertisers in addressing the climate and ecological emergency throughout their campaigns. The need for collective action and a shared ambition to drive change is emphasized, with initiatives like [#ChangeTheBrief](#) urging agencies to influence consumers toward more sustainable choices and behaviors.

In addition to campaign strategies, there's a growing awareness of the carbon footprint associated with events and conferences. In 2024, we hope to see efforts made to plan events more consciously, minimizing long-distance travel and encouraging sustainability as a core consideration in

event planning. Innovative platforms like [traceyour.events](#) are instrumental in this regard, offering tools to monitor and reduce the environmental impact of events worldwide.

The importance of measurement in reducing emissions is paramount for the year ahead and we predict the industry will begin to see more value in data for making crucial, informed business decisions that help transition us to **a green economy**. Collaboration is key and the DOOH industry needs to mobilize and come together to embrace new solutions that are on the horizon for measuring the end-to-end emissions of ads outside of the home.

Sustainability in DOOH is not merely a trend for 2024; it is a requirement and a necessary paradigm shift in the industry's ethos. With examples like [IKEA's Carbon Footprint campaign](#) and [McDonald's Bee Hotel Billboards](#), businesses are recognizing the need to align with broader environmental goals, presenting an opportunity for innovation, competitive advantage, and a genuine contribution to addressing the climate challenge.

Curated Deals

Fragmentation in the DOOH supply chain has led to heightened demands for control, transparency and precision when it comes to brand marketing strategies and in response, we are starting to see innovative technologies and platforms begin to emerge. In November 2023, Hivestack launched [Hivestack Curate](#), a new industry platform for curated deals in DOOH.

In 2024, we expect to see the industry evolve further to adopt these new solutions, and here's why:

For advertisers, it has never been more important to feel in **control over the quality and context of ad placements**. Yet the publisher inventory sourcing process is fragmented, meaning each different publisher screen selected for a specific campaign comes with separate deal IDs and siloed measurement dashboards, causing inefficiencies throughout the entire buying process. Being able to strategically curate the best inventory for a campaign

and a brand's business goals from one centralized platform, creating a single unified ID, is game-changing for the ecosystem.

In an era where data-driven decision-making is paramount, advertisers can layer data and analytics into their deal curation, to **refine their offerings**. This data-centric approach empowers advertisers with real-time insights, enabling them to optimize campaigns dynamically. By harnessing the power of data, advertisers can fine-tune their messages to resonate effectively with their target audience, ultimately driving measurable results.

In 2024, we expect to see new opportunities emerge to drive a **more personalized, efficient buying process** for brands across the world. This shift is indicative of the industry's commitment to providing advertisers with a more efficient and impactful solution for reaching their audiences.





Scale & Precision

In the dynamic landscape of digital marketing, 2024 will bring forward a nuanced trend that will likely reshape the way campaigns approach their objectives. The dichotomy between [scale and precision](#) in DOOH, once considered mutually exclusive, is now evolving into a symbiotic relationship, where marketers are finding innovative ways to strike **a balance between reaching a broad audience and delivering highly targeted messages**.

Traditionally, ads in OOH were either designed for mass appeal, casting a wide net to capture a broad audience, or crafted with precision targeting, aiming to connect with a specific demographic. However, in 2024, savvy marketers will integrate both scale and precision seamlessly into their strategies, powered by programmatic DOOH technology.

Advancements in artificial intelligence and machine learning algorithms are enabling marketers to analyze vast amounts of data to create personalized experiences for a wide audience. From tailored product recommendations to dynamic content, campaigns will become **more attuned to individual preferences without sacrificing reach**.

Campaigns leveraging dynamic content optimization (DCO) will have the added benefit of real-time customization of creative elements based on consumer behavior.

This not only ensures a personalized experience for individual users, but also allows campaigns to **adapt and resonate with different segments** of the audience simultaneously, maximizing both scale and precision.

The globalization of DOOH, largely in part by programmatic connectivity and functionality, has continued to grow in popularity with advertisers. **Borderless, or outside-in campaigns** have increased in demand and prove the effectiveness, scale and efficiency provided by programmatic platforms.

The trend of balancing scale and precision is expected to continue evolving, driven by technological advancements, consumer expectations, and market dynamics. As we move further into 2024 and beyond, campaigns that master this delicate balance will not only capture attention, but also build lasting connections with their audiences.



2024 Buzzwords

Understand the meaning behind some of the biggest buzzwords you're likely to encounter in the world of DOOH

Artificial intelligence (AI): The theory and development of computer systems able to perform tasks that normally require human intelligence, such as visual perception, speech recognition, decision-making and translation between languages

Algorithm: A series of mathematical instructions that are combined to direct a specific outcome

B2P: Business-to-person

Brand lift: A specific measurement within an advertising campaign that established the effectiveness in driving a positive shift and/or increase in customer awareness and perception of a brand

Demand side platform (DSP): A software platform that automates the media buying process from multiple sources including ad exchanges, ad networks and sell side platforms, often leveraging real-time bidding capabilities of these sources. DSPs allow advertisers to buy impressions across a range of publisher sites, but targeted to specific users based on information including location and previous browsing behavior

Dynamic content: The process of creating and enabling responsive and editable creative content leveraging data to deliver contextually relevant messages

Dynamic creative optimization (DCO): Dynamic creative optimization, or DCO, is a type of programmatic advertising that allows advertisers to optimize performance with customized creative based on real-time data

Mobile integration: Seamless connection with mobile devices for a more cohesive advertising experience

Predictive analytics: Predictive analytics is the use of statistics and modeling techniques using current and historical data to make predictions about future outcomes

Programmatic digital out of home (DOOH): Programmatic digital out of home, also known as programmatic DOOH or pDOOH, refers to the automated buying, selling, and delivery of out-of-home advertising (digital boards and signage)

Omnichannel marketing: The seamless integration of creative, branding and messaging, between interconnected and diverse formats, enabling a more impactful customer experience

Sustainability and Green Tech: Emphasizing environmentally friendly practices and the use of energy-efficient technologies in DOOH installations



Small changes can make a **big** **difference.**



Advertising is about people. Connecting to the right ones, speaking the right words and hoping the outcome follows the expectations of a carefully crafted strategy. As we enter a new year, advertisers continue to be spoiled for choice when it comes to **picking the right way forward.**

Although the world is more connected than ever and opportunities to make an impact seem limitless, it doesn't necessarily make it any easier to achieve.

The industry might be innovating at an incredibly fast pace, but don't fall into the trap of thinking everything new is for you. We believe creating **customized experiences**, as well as genuine and **authentic connections** should be the priority in the new year. Being mindful and staying true to your core values is the best way to **stand out from the competition** and cut through all of the noise.

Advertisers that focus on their objectives, trust the data, choose the right partners and incorporate some new channels into their marketing mix are the most likely to succeed in 2024.

Demo it. See it. Believe it.

To learn more, please visit hivestack.com.

