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The Year Ahead **2022**

TRENDS REPORT



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There's lots to look forward to in 2022. People's desire to shake off the pandemic and experience life outside as much as possible mean the world will once more be a playground in which we can find, interact, buy, and share, all in real time. With people actively seeking out novelty, innovating the in-person experience will be one of the best things a brand can do. And new data, creative and tech capabilities mean OOH offers more opportunity to do this than ever before.

In this report we look at five emerging opportunities and trends in OOH and how brands can leverage them over the coming year. From bringing real and virtual experiences together through the public and private screen, to the rise of contextual messaging and an increasing focus on more inclusive and sustainable media planning.

We hope you find this report useful, and we look forward to an amazing 2022 for us all.

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A person is seen from behind, walking through a futuristic tunnel. The tunnel is illuminated with vibrant blue and purple lights, creating a sense of depth and movement. The person is wearing a dark, textured sweater and has a bag slung over their shoulder. The overall atmosphere is mysterious and high-tech.

Access All Areas

LOCKDOWN ACCELERATED THE ADOPTION OF DIGITAL CULTURE AS PEOPLE SOUGHT NEW WAYS TO CONNECT TO THE PEOPLE, PLACES AND THINGS THEY WERE DENIED DURING THE WORST PARTS OF THE PANDEMIC. NOW, THERE IS AN OPPORTUNITY TO NURTURE THIS BEHAVIOUR IN THE REAL WORLD.

WHY NOW?

In 2021, we spent more time online and tried new things. Businesses tested new strategies and platforms to represent their brand and deliver services digitally. According to IBM's Retail Index, the pandemic accelerated the shift to digital shopping by roughly five years.

Within that, Augmented Reality quickly became an essential technology for retailers. AR enabled shoppers to visualise, personalise and test products before purchase. At the end of 2020, NYX Cosmetics hosted over 60 million try-ons of their [beauty experience](#) in a single day through an AR lens. While Dior enabled [try-on of sneakers](#) in a Lens that was viewed 2.3 million times. As well as being fun, AR solved actual pain points for customers, and has proved successful at driving conversion - Shopify data shows that interactions with products through AR delivers a [94% higher conversion rate](#) than those without.

*Shopify data 2021



94%

Interactions with products through AR deliver a 94% higher conversion rate than those without*



// **Integrating and layering mobile over OOH spaces, events and installations will increasingly make sense** //

WHAT'S NEXT

When we were allowed outside, we also learnt new digital behaviours. One of the most noticeable was the adoption of QR codes. After 25 years they got their moment, enabling us to order, pay and check in by scanning posters.

Many of these newly acquired digital behaviours will likely survive and shape consumer expectations moving forward. In 2022, integrating and layering mobile over OOH spaces, events and installations will increasingly make sense. We expect to see more brands integrating visual codes from platforms like Instagram, Snap, Facebook, Tik Tok and WhatsApp.

App Clip codes, a small part of a brand's app that's discoverable at the moment it's needed, can also be applied to situations in OOH, like ordering dinner on the way home. In October, Marvel Studios used an AppClip to launch an [Eternals AR experience](#).

Visual codes within OOH can extend the reach of digital experiences to the real world by providing a visible link to content. DOOH can

boost interaction by pushing relevant content at relevant times in relevant locations.

With AR and World Lenses, OOH will increasingly be used as a canvas for augmentation or to act as a digital store front. Additional layers can be added to murals and installations to enhance the experience of the creative. Interaction and exploration of the creative can be enabled. The need for novelty drives us as humans and people will seek out the new and interesting, unlocking commerce at location.

**700
million**

**people use
Facebook AR
effects monthly***

**Facebook 2021*

// **With AR and World Lenses, OOH can be a canvas for augmentation or act as a digital store front** //

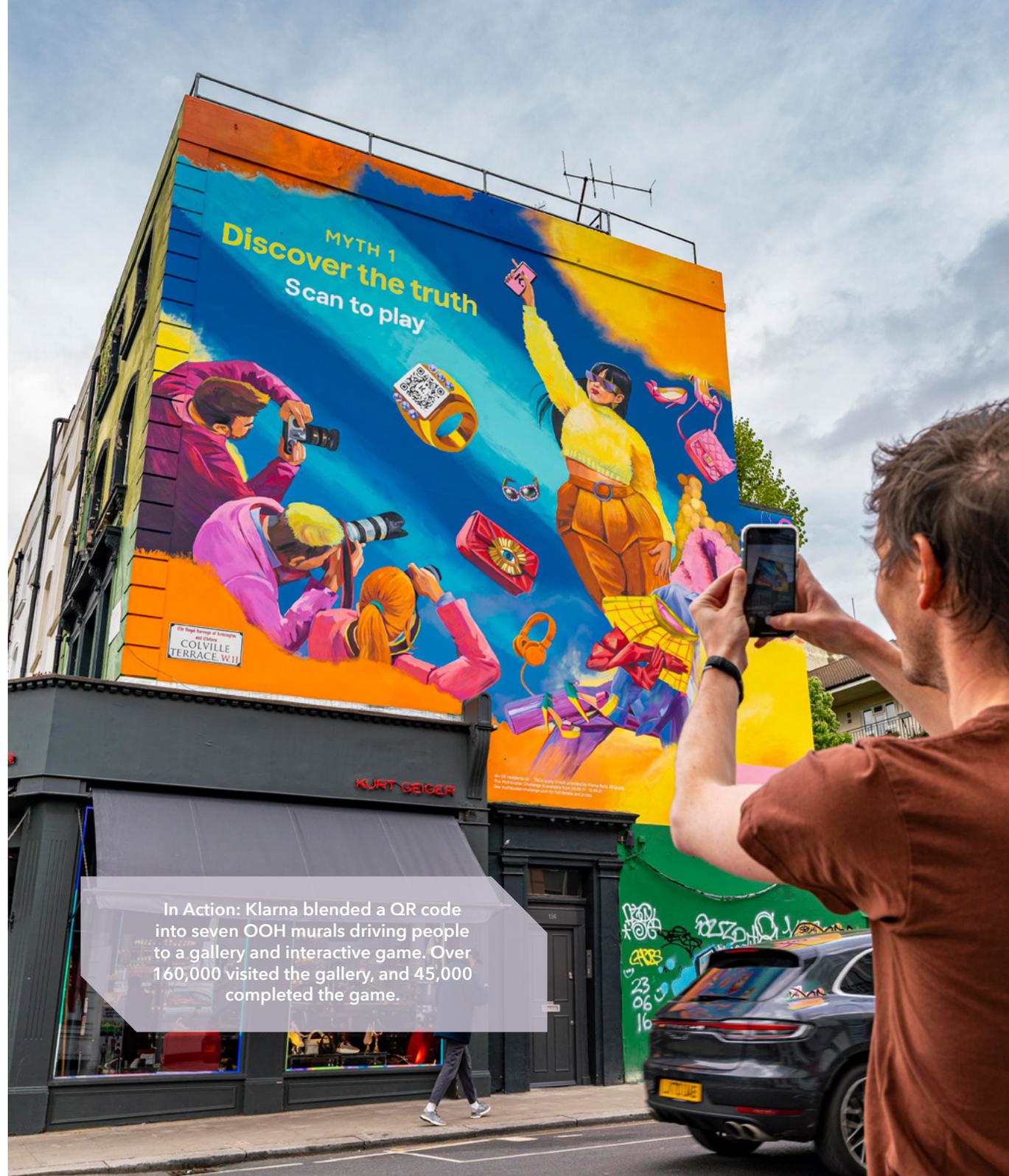
THE 2022 OPPORTUNITY

2022 offers a great opportunity for brands to be novel and helpful in this space by combining mobile tech like AR and codes with OOH to innovate in-person experiences. It's now possible for brands to create entirely virtual spaces mapped over real physical locations through which any number of brand experiences can be accessed. Every OOH touchpoint can now open up access to digital spaces that enable deeper engagement and retail opportunities.

61%

of 18-34s enjoy using AR with OOH*

*Kinetic Alfresco Life Nov 2021



In Action: Klarna blended a QR code into seven OOH murals driving people to a gallery and interactive game. Over 160,000 visited the gallery, and 45,000 completed the game.



Real-Time Revolution

COVID HAS INCREASED THE RELIANCE ON REAL-TIME DATA AS PEOPLE AND BUSINESSES COPE WITH A MORE VOLATILE WORLD. AT THE SAME TIME, CONSUMERS HAVE BECOME SAVVIER. WHILE THEY WANT MORE RELEVANT INFORMATION, IT NEEDS TO BE BALANCED WITH FINDING ADVERTISING TOO INTRUSIVE.

WHY NOW?

In the past decade we've witnessed a data explosion driven by the rise of connected devices, along with the ability to analyse the data they generate, and the automation to act on it.

During Covid, as more people worked and learned from home and used home entertainment options more often, the volume of data captured worldwide reached a new high. As well as more data, Covid has increased the reliance on *real-time* data. As brands have increasingly needed to anticipate what's next and be able to react.

But alongside this growth in data creation and consumption, consumers have also become savvier. While they want more relevant information, it needs to be balanced with their awareness of data privacy and finding advertising too intrusive.

+341%

predicted growth in the volume of data created by 2025*

“ **Real-time data is now being combined with automated technology and DOOH to deliver smarter and faster OOH activations** ”

WHAT'S NEXT

Over the last 20 months, OOH has undergone a real-time data revolution. At the height of the pandemic, real-time audience data helped us understand changing movement patterns. Now, it's being combined with automated technology and DOOH to deliver smarter and faster activations that bring utility and value to consumers and brands alike.

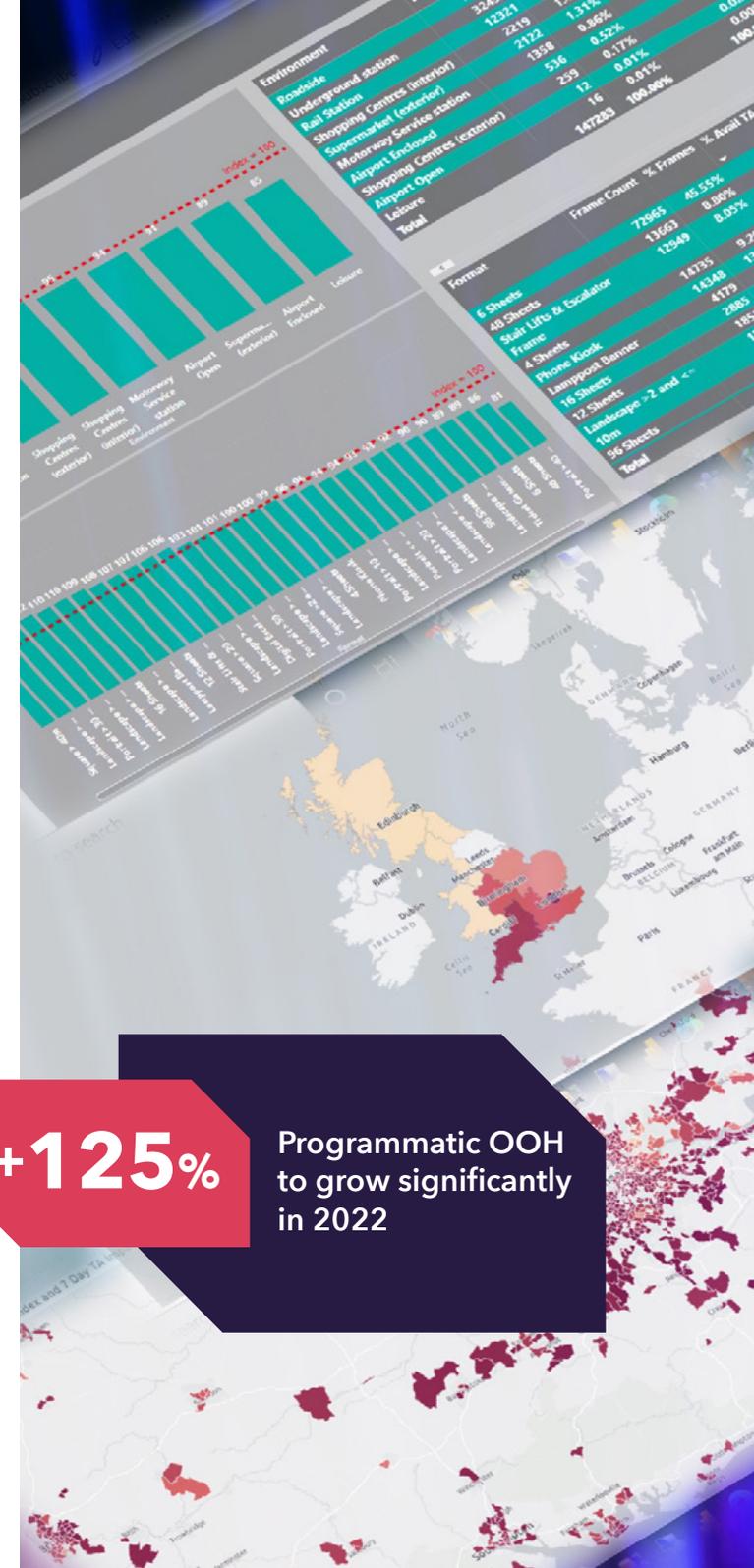
Last year we saw growth in programmatic DOOH of +65%. Thanks to more inventory being made available, more access to real-time data and more understanding from brands on how programmatic OOH works as part of the wider digital ecosystem, we expect to see further growth of +125% in 2022.

While agencies, brands and online media owners will be rethinking their approach as cookies cease to exist, OOH is leading the way in the application of privacy-first, geo-contextual data.

Our Journeys platform uses a range of anonymised and aggregated real-world data sets including mobile SDK, telco, purchase and sales data, as well as offline data sets such as ONS, Experian and Route. Journeys can ingest 1st party data too. Telco data in particular provides us with insights into people's movement trends across the country. These are driven by mobile devices connecting to masts and provide an aggregated overview of how and where people are travelling in a fully GDPR compliant way. This technology, with a strong geo-contextual element at an aggregate level, lends itself strongly to the OOH medium and its one-to-many messaging.

So, the impending demise of cookies will impact other digital channels in a big way in 2022 and beyond. But OOH and PrOOH is future-proofed, and more brands will look to OOH to deliver privacy-first, yet targeted and contextual solutions in 2022.

+125% Programmatic OOH to grow significantly in 2022



// **More brands will look to OOH to deliver privacy-first, yet targeted and contextual solutions in 2022**

//

THE 2022 OPPORTUNITY

Real-time targeting and programmatic activation of core campaigns will deliver more efficient, more effective OOH outcomes this year. There is also opportunity for seamless cross-channel digital activation by replicating digital behavioural audiences in OOH.

Brands should also use OOH's new data capabilities to measure campaign outcomes such as exposure, footfall, sales, or brand uplift. With the added reassurance of using privacy-first, GDPR compliant data that won't be impacted by the demise of cookies.

But perhaps the biggest opportunity for brands in 2022 is to fuse first-party data with our Journeys data to create even more bespoke and effective solutions.

In Action: As the UK came out of lockdown, real-time location and mobility data was mapped against programmatic digital OOH inventory, resulting in an increase in footfall to M&S food stores of over 9%.

JCDecaux

ONLY 1 MINUTE AWAY

Your M&S lunch just got even better

New semolina topped roll

New Peppercorn Mayo

Now even tastier

BEEF & ONION ROLL

THIS IS NOT JUST FOOD THIS IS →

M&S FOOD

Mon - Fri
Midnight - 7am
7am
me
ders
0297

**Location + context =
supercharged OOH**



CONTEXTUAL ACTIVATION IS A HOT TOPIC FOR 2022. IT'S RETURNING TO AGENDAS AS CONCERNS AROUND PRIVACY GROW AND THE DEATH OF THE COOKIE EVENTUATES.

WHY NOW?

COVID has accelerated consumers' already growing expectation to tap into personalised/near me content. A generation used to accessing almost everything at the touch of a button online has shifted this expectation into the real world and now expect information to be filtered for them based on where they are and what they're doing.

Connected devices have also obliterated 'free-time'. Now every moment, regardless of location, is a potential mobile moment, which can be filled with exploration, entertainment, or commerce. Mobile behaviours that can be triggered by contextual OOH messaging that taps into the right need or mood at the right moment.

The growing consumer expectation for relevant information combined with OOH's new real-time targeting and delivery capabilities mean contextual OOH messaging is set to explode in 2022.



// **Now every moment, regardless of location, is a potential mobile moment.. that can be triggered by contextual OOH messaging** //



Over 80%* of consumers...

- ...conduct local searches
- ...have either researched a product or checked prices online whilst on public transport
- ...have made a note of something they've seen to use later

WHAT'S NEXT

Location and context have always been a strength of OOH. And not just since the growth of DOOH. Contextual messaging can be used across all environments and formats and even within experiential activations. But with the explosion of real-time data and advancements in delivery tech, this trend will be supercharged this year.

All that's needed is a relevant data source to anchor a brand's message to the context in which it is seen, e.g., location, environment, time, weather, events, news, sales, social. These triggers help brands to tell a story and increase the relevance of messages to audiences. Research shows that contextually relevant DOOH messaging increases effectiveness by 17%. While OOH creative that evolves over time delivers a 38% higher impact than that of static creative by day five.

Some brands have always capitalised on locational context, with some particularly strong results in certain regional towns. Last year, we saw an increase in the use of automation and dynamic copy optimisation as brands looked to keep up with the changing mood of the nation. And this will become more widespread in 2022 as more brands combine multiple layers of context-aware data to deliver messaging that works harder, resonates deeper and feels more personal. Without compromising privacy.

**Kinetic Alfresco Life Nov 2021*



Localised search trends based on purchase intent informs copy

+17%

on average, contextually relevant DOOH messaging increases effectiveness*



First-party data informed creative by post code sector

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Leveraging first-party data and layering multiple contextual triggers will provide stronger relevance
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THE 2022 OPPORTUNITY

Contextual OOH makes it possible to own moments throughout the day, regardless of where people are working or playing. The desire to get out and experience as much as possible in 2022 will create countless opportunities for brands to capitalise on buoyant moods and tap into in real-life cultural and social moments.

We predict double digit growth when it comes to seeing contextual messaging on the streets. Leveraging first-party data and layering multiple contextual triggers will provide stronger relevance for audiences, resulting in higher engagement rates.

Brands should consider context for every campaign and utilise the full capabilities of DOOH and ProOH. Though that doesn't mean out with the old - classic formats shouldn't be discounted. These are powerful vehicles for contextual messaging particularly of a topical and location-based nature.

*The Moments of Truth 2020

A photograph taken at night from a balcony or rooftop. In the foreground, the silhouettes of two people are visible. The person on the left is wearing a cap and holding a camera, while the person on the right is looking towards the city. The background is filled with the vibrant, colorful lights of a city at night, including a prominent structure with bright neon lights. The overall mood is artistic and urban.

Creativity is Content

IN 2021, WE EXPERIENCED A GREAT SURGE IN INTEREST IN CREATIVE OOH SOLUTIONS. WITH THE EXCEPTIONAL ONES MAKING HEADLINES AND CATCHING THE ATTENTION OF MILLIONS OF CONSUMERS ONLINE. OOH CREATIVITY IS NOW CONTENT.

WHY NOW?

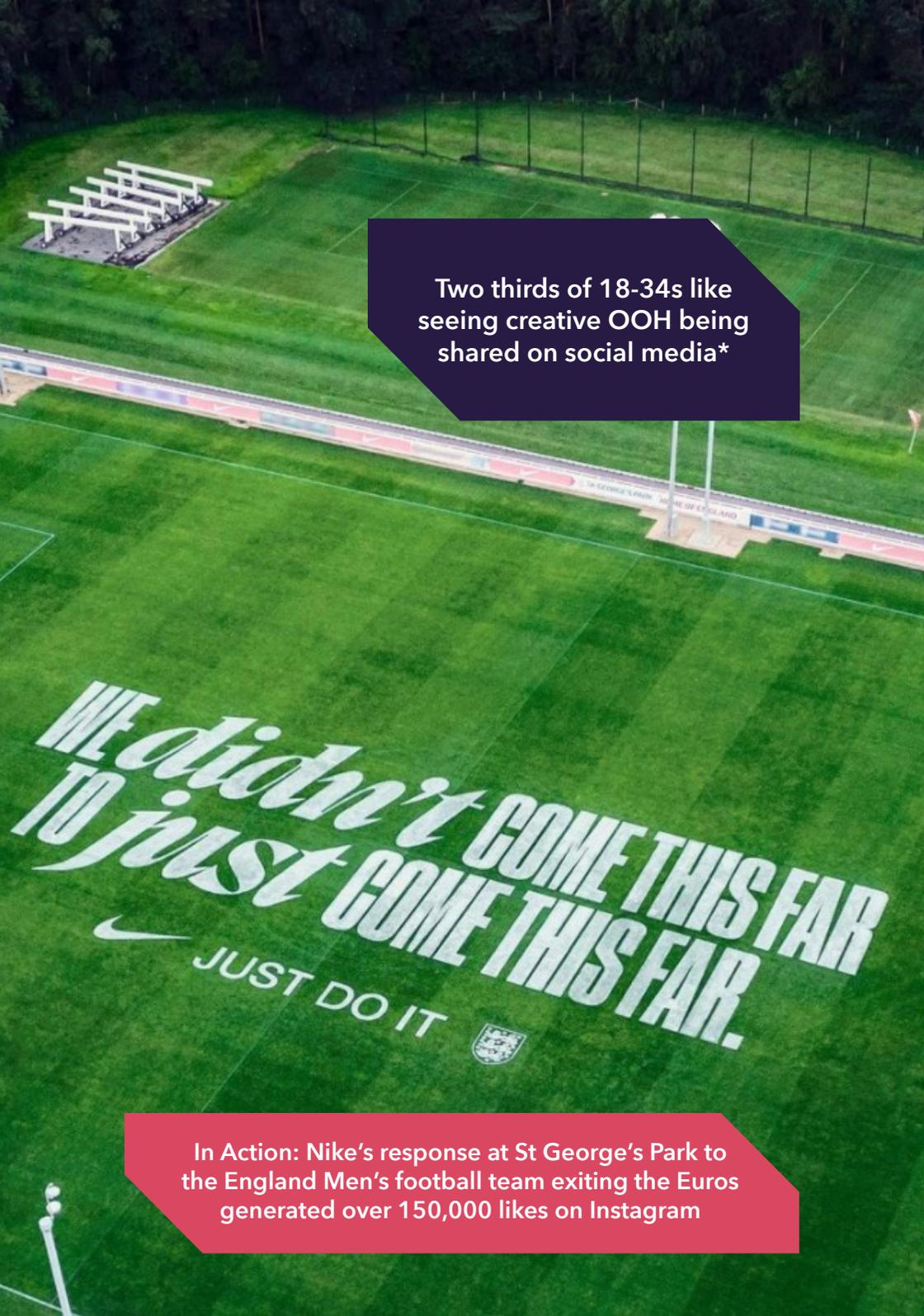
Creative OOH is an amalgamation of the latest and best techniques and applications from the art, science and innovation communities that can be connected and combined to accommodate any creative requirement or context.

Recent successful executions have generated huge volumes of earned media and broken into mainstream news, demonstrating how combining and layering creative techniques can produce impressive results. This exposure has generated more demand for creative solutions and an interest in the role creative OOH can play within a wider campaign context.

Creative OOH activations possess a unique ability to stand-out amongst the digital noise - as well as being clever and easily understood, they are real, tangible, and genuine. In 2022, we will see more creative OOH devised with social content in mind.



In Action: Marmite's explosive OOH campaign created a huge buzz online, generating 194m impressions and £650k in earned media, resulting in sales 5x higher than previous limited-edition releases.



Two thirds of 18-34s like seeing creative OOH being shared on social media*

In Action: Nike's response at St George's Park to the England Men's football team exiting the Euros generated over 150,000 likes on Instagram

// **Recent successful executions have generated huge volumes of earned media and broken into mainstream news**

WHAT'S NEXT

In 2022, brands will continue to explore and experiment with OOH to generate digital content.

We expect to see more brands choosing traditional OOH as a focal point for elements of their campaign. And we'll see more one-off installations used like a one panel comic strip or meme. Like [Wall's Mini Bites](#), or the [Bake-Off Banner](#) - visual set pieces that are easily interpreted and understood with no cluttered copy or further explanation needed.

Brands will continue to experiment with small-scale, fame-driving creative OOH executions that can generate earned media but also provide a physical anchor to a predominantly digital campaign.

We will see old techniques being applied in new spaces with 3D DOOH. The many stunning examples like [Netflix Army of The Dead](#) show that old and new approaches can earn traction online.

The trend for reactive or short-term traditional OOH installation to produce content for use on social will also continue, especially around events. Like Nike did at St George's Park following England's Euro exit in 2021 generating over 150k Instagram likes).

2022 is full of big calendar events to plan something special around. We predict more brands and creative teams will commit to creative OOH campaigns to deliver distinctive, attention-grabbing, shareable content.



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Brands should experiment more with small-scale or one-off, fame-driving creative OOH executions that can generate earned media
//

THE 2022 OPPORTUNITY

Two thirds of 18-34s like seeing creative OOH being shared on social media, by either their friends or the brand themselves. So, the opportunity is there, and by exploring OOH creative options, brands can deliver work that is enjoyed and shared by audiences.

Creatives can challenge themselves to push the boundaries of what is possible when combining creative, craft, and context. In 2022, OOH creativity will be viewed as a core element of an ambitious communications plan. And OOH will be confirmed as the home of creativity.



Real-World Responsibility

THERE IS A SHIFT IN CONSCIOUSNESS HAPPENING ACROSS THE GLOBE. AMID THE DISRUPTION OF THE PANDEMIC, THE WORLD HAS SEEN A GROWING IMPORTANCE OF INCLUSIVITY AND SUSTAINABILITY. AND THERE ARE SOLID BUSINESS REASONS WHY BRANDS NEED TO THINK MORE ABOUT WHO THEY ARE TRYING TO REACH AND IMPORTANTLY, WHO THEY MIGHT BE EXCLUDING, WHEN PLANNING MEDIA.

WHY NOW?

The impact of social awareness on purchases means consumers want to engage with brands that align with their own values and can help drive change. Consumers are playing an increasingly important role in driving sustainable and ethical business practices.

Recent studies from LBG and Channel 4 show how inclusive marketing, reflective of the real world, can protect a brand's reputation and ensure it is viewed more positively. Crucially, inclusive marketing can fuel growth and much needed sales by tapping into the huge spending power of many diverse groups, including:

£300bn spending power of UK Black, Asian and Minority ethnic groups

£6bn spending power of the LGBT+ community

£200m spent by UK Muslims during Ramadan on food and gifts for family and friends

In our [Real-World Planning](#) research, we proved that inclusive OOH messaging significantly drives higher purchase intent among young people and city living audiences; audiences who appreciate the public nature of the message.



88%

want brands to help them make a difference

67%

say advertisers should show more diverse aspects of society

//
**Research proves that inclusive marketing
positively impacts purchase intent** //

WHAT'S NEXT

In 2022, consumers will expect brands to use their power and platforms to address societal and environmental issues, and empower the communities they operate in. They won't be afraid of challenging brands whose one-off campaigns or motives are deemed ingenuine.

Because of its public nature, brands using OOH are perceived as more trustworthy and authentic. In 2022, brands will tap into this to educate, unite communities, build empathy, and become a part of cultural moments. As a public medium, OOH delivers real-world reach across every environment, providing brands with a platform to reach everyone regardless of who or where they are.

Brands are also increasingly thinking about sustainability. Around the world it's agreed that climate change is an emergency. According to our own research, 80% UK adults believe it's important that businesses operate in a more sustainable manner.

Serving communities and improving the quality of public life has been part of OOH's DNA for many years. In 2022, the medium will increasingly become the message. Brands will take advantage of a variety of new eco OOH solutions with air purifying capabilities, recyclable materials and renewable energy and installations like Clear Channel's Bee Bus Stops that support local communities and biodiversity.





// **50% of OOH revenue goes back to public infrastructure and the wider economy** //

THE 2022 OPPORTUNITY

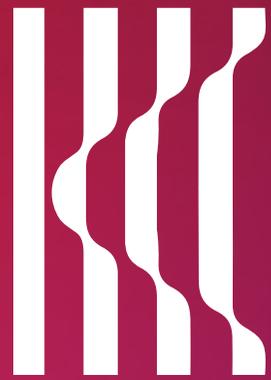
Consumers everywhere will demand good choices from brands in 2022. They expect brands to address environmental issues and empower the local and global communities they operate in. OOH can facilitate this in unique and powerful ways.

Consumers want to engage with brands that genuinely care about people and they want their values - and their backgrounds - taken seriously. Brands need to share inclusive messaging publicly to ensure they are reaching (and not excluding) key audiences. OOH is an inclusive platform with real-world reach (97% week reach of UK adults). And has a suite of datapoints that help to make campaigns work harder and improve efficacy amongst target audiences.

OOH media, because of its public nature, can be the catalyst for change. Invention and innovation capable of solving major environmental or social issues can find support through OOH. And advances in technology means that the OOH industry can lead the way in sustainable advertising delivery.

80% feel strongly that companies should help improve the environment

A long, brightly lit hallway with a person walking in the distance. The hallway has a polished floor that reflects the overhead lights. On the left side, there is a long, low railing or barrier. The ceiling is high and features exposed pipes and lighting fixtures. At the end of the hallway, there is a large window or glass door that looks out onto a dark, wooded area. The overall atmosphere is clean, modern, and professional.

The Year Ahead **2022**

Thanks to all our contributors:

Madeleine Brown, Hesham Helmy, Christy Johnston,
Nicole Lonsdale, Dominic Murray, Sarah Robinson