Broadsign

STATE OF STATIC OOH REPORT
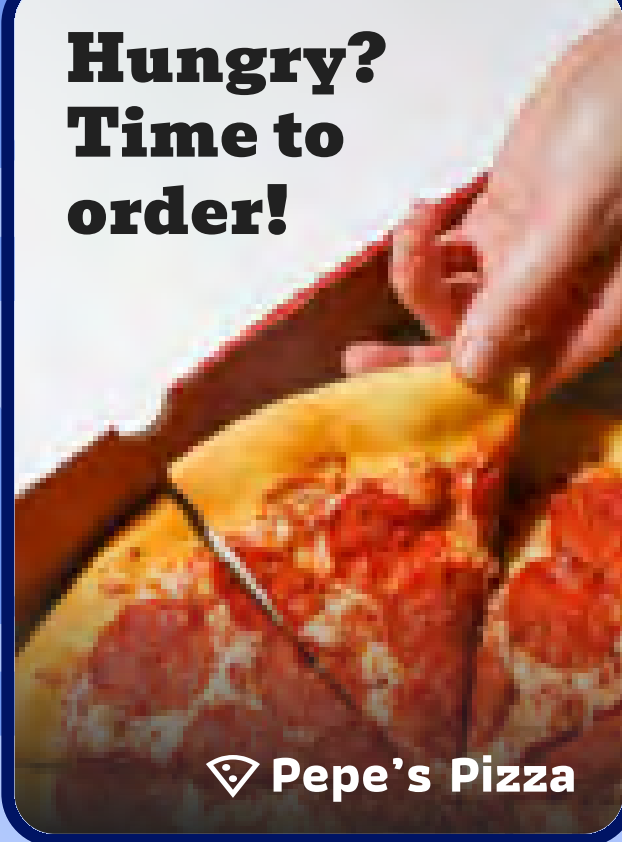
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INTRODUCTION

The advertising landscape has always evolved quickly. But as one of the oldest mediums in the modern marketer's toolkit, static out-of-home (OOH) advertising is still proving to be one of the most effective channels for capturing audience attention and driving real-world impact.

In 2024, brands are tapping into traditional and cost-effective advertising mediums to reach their target audiences offline and outside of their homes, with demand for innovative, contextually relevant content at an all-time high. Resources, however, are stretched. Unlike digital out-of-home (DOOH), static media owners still rely on manual-heavy processes to manage their inventory network. Automation is helping to ease some of this pressure, with real-time data integration to help with inventory availability, proposal generation, proof-of-performance (PoP) and more. And a new group of campaign management solutions are making it easier for the growing number of hybrid networks to seamlessly manage their mix of static and digital out-of-home (DOOH) inventory.

We surveyed static OOH media leaders around the globe to find out what's top of mind for them this year, and what they're focusing their energy (and budgets) toward. The biggest topics of conversation are around **operational efficiency and automation**, **sustainability**, and **proving the value of static out-of-home advertising** in an increasingly digitized world.

As brands are trying new, out-of-the-box creative, experimenting with incorporating OOH into multi-channel campaigns, and becoming more vocal about their commitment to the environment, today's media owners are eager to show them that traditional out-of-home advertising is anything but static.

EXECUTIVE SUMMARY

01 STATIC OOH CONTINUES TO THRIVE IN THE DIGITAL ERA

Static out-of-home signage is one of the oldest and most iconic forms of advertising. Although most media owners show a strong interest in modernizing and making inventory more dynamic and data-driven, we found evidence that networks with static inventory aren't planning on getting rid of them anytime soon. **According to our survey, nearly three-quarters of today's media owners plan to keep at least 75% of their static OOH inventory intact for the foreseeable future.**

02 SIZE AND LOCATION SHAPE NETWORK EXPERIENCES

We found key differences in the experiences and operational challenges of static OOH owners based on the makeup of their out-of-home media business. **On average, proof-of-performance (PoP) and proposal management are +120% more likely to cause headaches for larger networks (1,501+ static faces) than smaller ones based on the results of our survey.**

03 STREAMLINING TIME-CONSUMING STATIC WORKFLOWS IS NOW IMPERATIVE

Today's advertisers expect fast turnaround times, exciting new creative opportunities, and the flexibility to make last-minute changes. But these demands pose a challenge for static OOH media owners, many of whom still rely on time-consuming manual processes and tools to manage their inventory and oversee the production, printing, and installation of static campaigns. **When it comes to growing future ad revenue, 53% of the static OOH media owners we surveyed believe that operational inefficiencies are putting them at a competitive disadvantage.**

04 ADVANCED TECHNOLOGY COMES TO STATIC OOH

Technology is evolving quickly — not just for digital marketers and advertisers, but also for OOH networks with static inventory. While there have historically been a number of perceived challenges around the medium that are holding some brands' investment back, modern tracking methods and automated workflows are making those hurdles a thing of the past. **As the industry continues to embrace data-backed insights and a more agile approach to static campaign development, less than 9% of surveyed static OOH companies still see new technology integrations as a threat to their future growth.**

05 A GREENER PATH FORWARD...

The evolution towards more eco-friendly static OOH advertising not only aligns with environmental consciousness but also promises long-term economic viability in an increasingly eco-aware market. **More than half (64%) of the static OOH companies we surveyed have already pledged to reduce their carbon footprint, while an additional 17% already have plans to implement more sustainable practices within the next few years.**

STATIC OOH CONTINUES TO THRIVE IN THE DIGITAL ERA
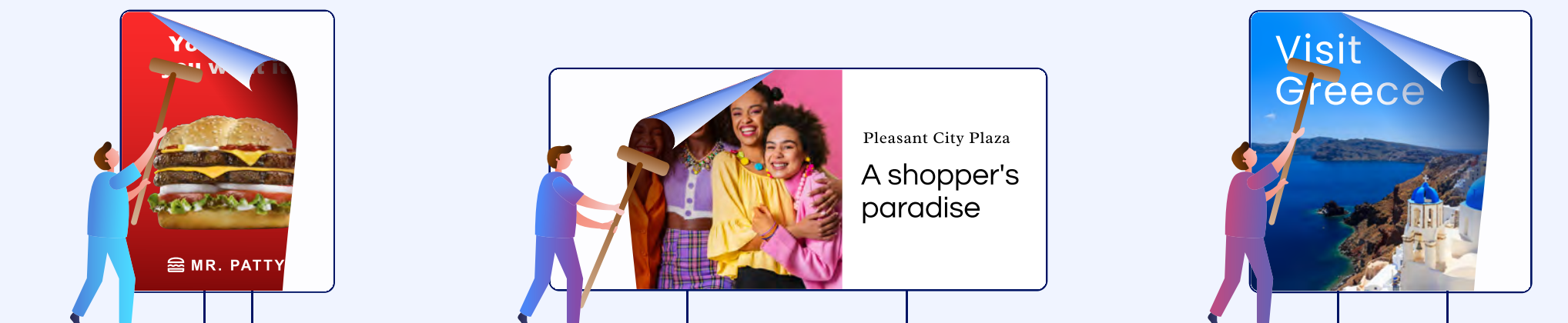
Despite all the attention digital out-of-home (DOOH) and programmatic digital OOH (pDOOH) are receiving in the industry, static OOH remains the dominant format in this ad space[1]. Its enduring value was reflected in our own Broadsign survey data, which showed that 73% of media owners expect to digitize less than a quarter of their existing static inventory moving forward. It helps solidify a feeling we've had for years: **that static OOH remains one of the most effective ways to reach audiences at scale and drive real-world impact.**

More significantly, the continued relevance of static OOH placements in 2024 demonstrates the power and importance of reaching screen-weary consumers as they go about their day-to-day lives. With their eye-catching large formats, strategic placements, and 100% share of voice, static OOH placements can provide advertisers with a competitive edge in an era of digital fatigue and increasing privacy concerns.

TOP TAKEAWAYS FROM THIS CHAPTER:

⊘ **Networks continue to embrace digital OOH**
Out-of-home networks show a strong interest in modernizing and making inventory more dynamic and data-driven.

⊘ **Static is here to stay**
While the trend toward digitization is expected to continue across all regions, most media owners plan to retain some portion of their static inventory for the foreseeable future.

NETWORKS CONTINUE TO EMBRACE DIGITAL OOH

The out-of-home industry's embrace of digital technologies isn't just a passing trend; rather, it marks a strategic evolution. This is especially true for advertising networks that have traditionally relied on static inventory.
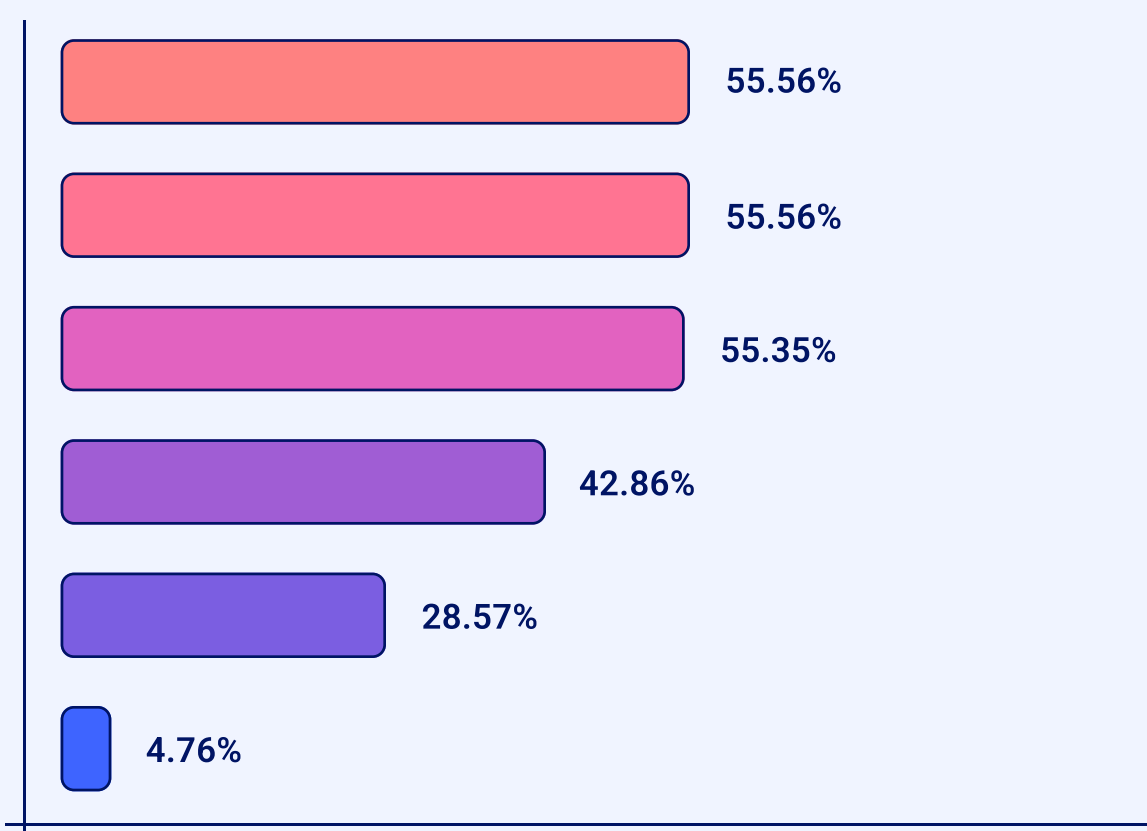
Rather than resisting change, OOH networks with static inventory are actively integrating digitization into their core strategies. **More than two-thirds of the static OOH media owners we surveyed classify their networks as "hybrid"**, meaning they offer a mix of static and digital inventory to advertisers.

How media owners with static OOH inventory classify their network

FULLY STATIC
30.2%

MIXED (STATIC & DIGITAL)
69.8%
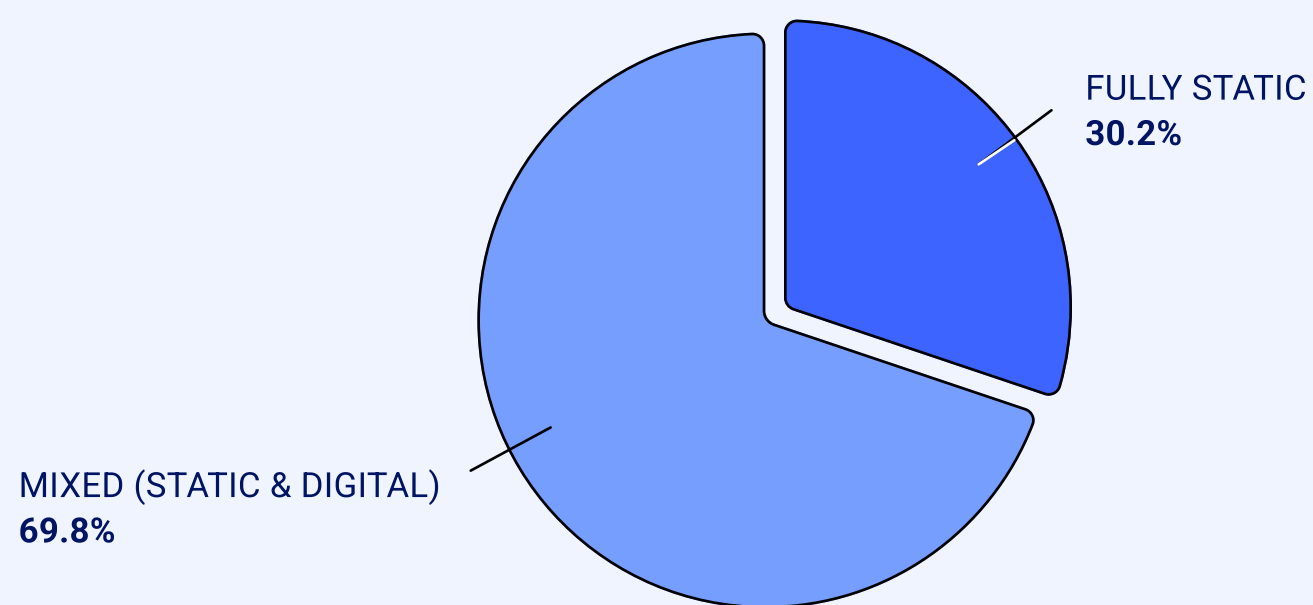
Moving forward, that number is expected to grow, with nearly 43% of survey respondents saying they plan to invest in the digitization of existing static faces in the next 1-2 years.

Top priorities for business investment in the next 1-2 years

55.56%
55.56%
55.35%
42.86%
28.57%
4.76%

- ● Additional OOH
- ● Improving operational efficiency
- ● Acquisition & mergers
- ● Marketing & sales of existing inventory
- ● Digitizing static
- ● Other (please specify)
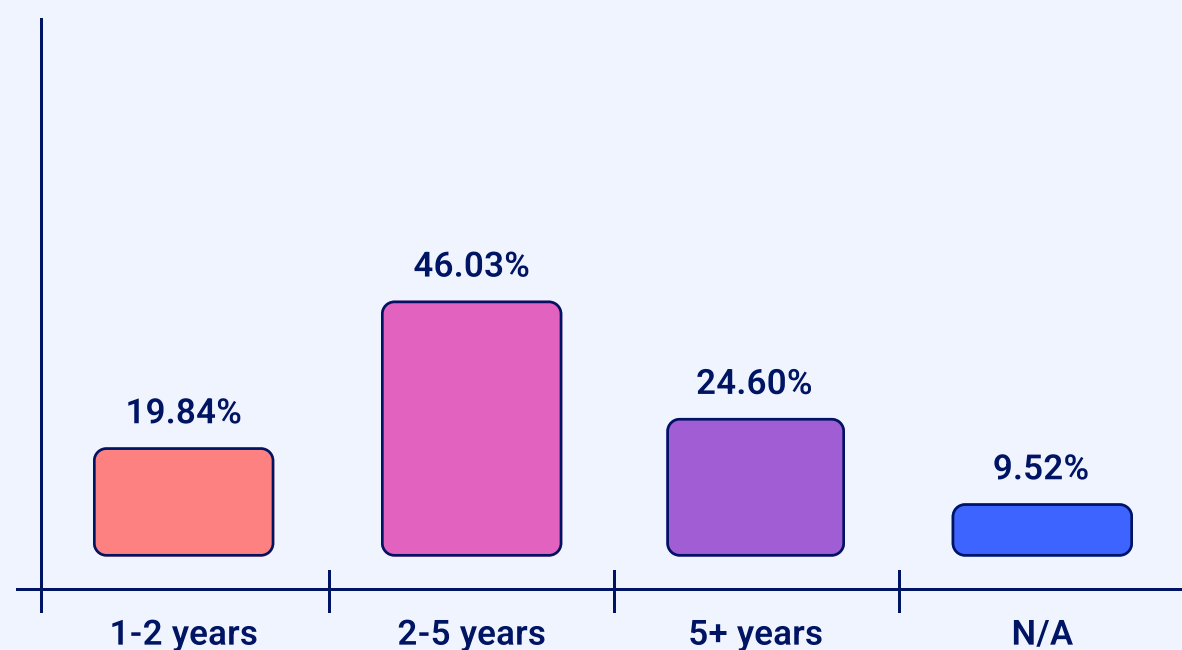
STATIC IS HERE TO STAY

The global events of the past few years exacerbated the need for media owners to enhance their digital transformation strategies — but that doesn't mean static OOH is going to be replaced anytime soon. With their long-term exposure, eye-catching large formats, and strategic placements, static billboards can provide advertisers with a competitive edge in this era of digital dominance.

Static media's enduring appeal is reflected in the results of our survey, which found that **70% of OOH networks with inventory digitization plans intend to convert less than a quarter of their existing static faces.** And the majority of those networks don't expect these digitization efforts to be completed for another 2-5 years. Meanwhile, close to 9% of OOH networks surveyed say they plan on keeping all of their existing static inventory intact.

Percentage of existing static inventory networks intend to digitize in the future

	0%	1-25%	26-50%	51-100%
	8.73%	64.29%	22.22%	4.76%
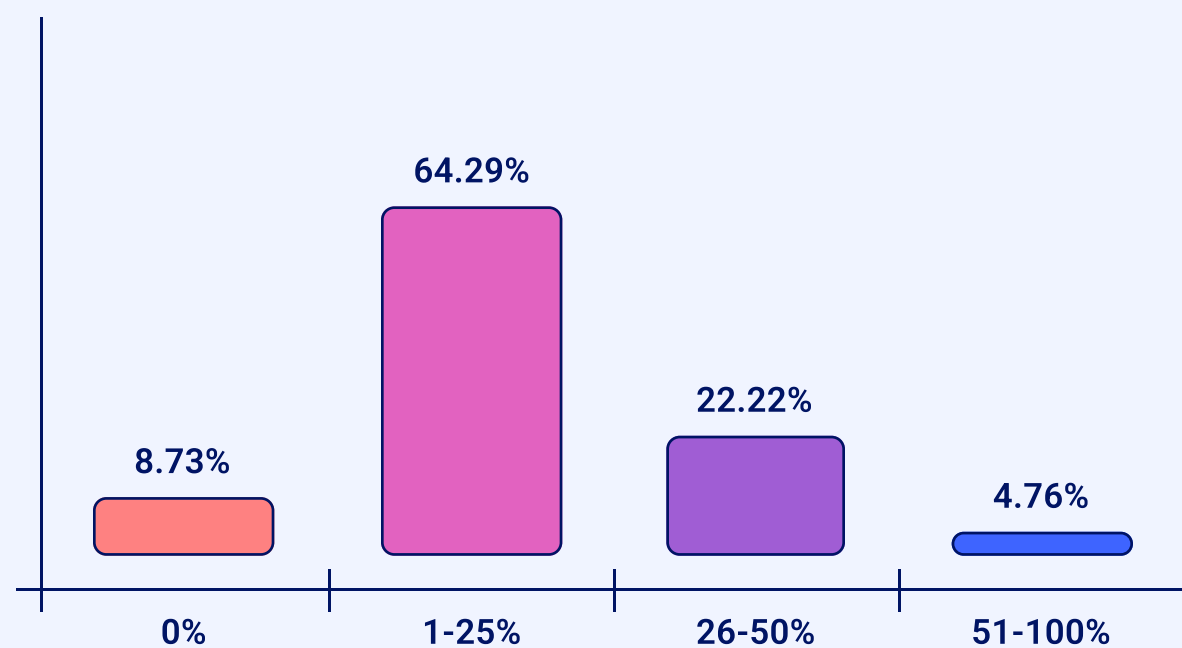
Network timelines for planned digitization of static OOH inventory

	1-2 years	2-5 years	5+ years	N/A
	19.84%	46.03%	24.60%	9.52%

Advertisers continue to choose static formats for their:

- ⊘ Unrivaled visibility
- ⊘ Cost-effectiveness
- ⊘ Long-term exposure
- ⊘ 100% share of voice

SIZE AND LOCATION SHAPE NETWORK EXPERIENCES
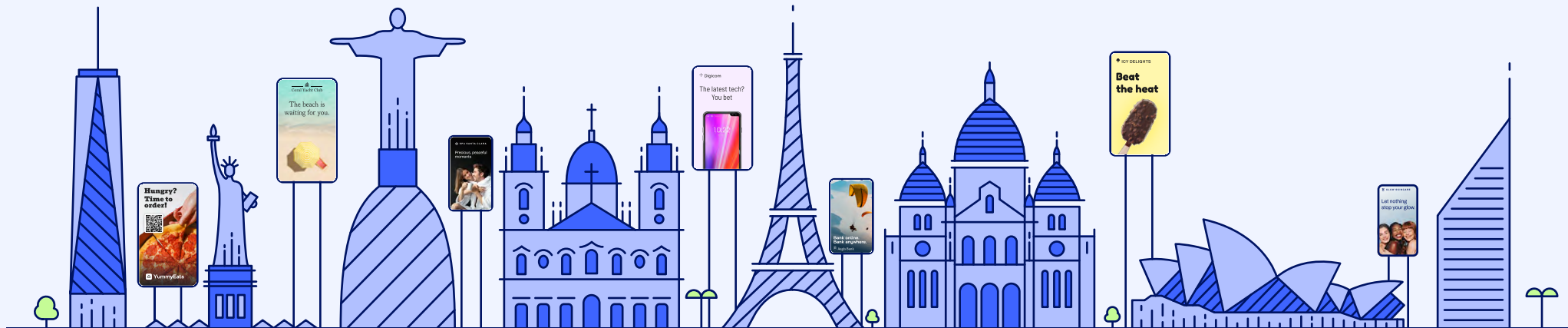
Media owners overseeing static out-of-home inventory already recognize that the impact of a traditional billboard campaign is inherently tied to the size and strategic placement of creative. Likewise, the size and location of static OOH networks influence the experiences of the media owners that manage them. For example, our survey data shows that as the number of static assets in a network increase, so too does the complexity of their management. Whether they're orchestrating a citywide spectacle with colossal billboards or crafting intimate narratives in select neighborhoods, it's apparent that **static OOH media owners' experiences are shaped by their network size and geographic location.**
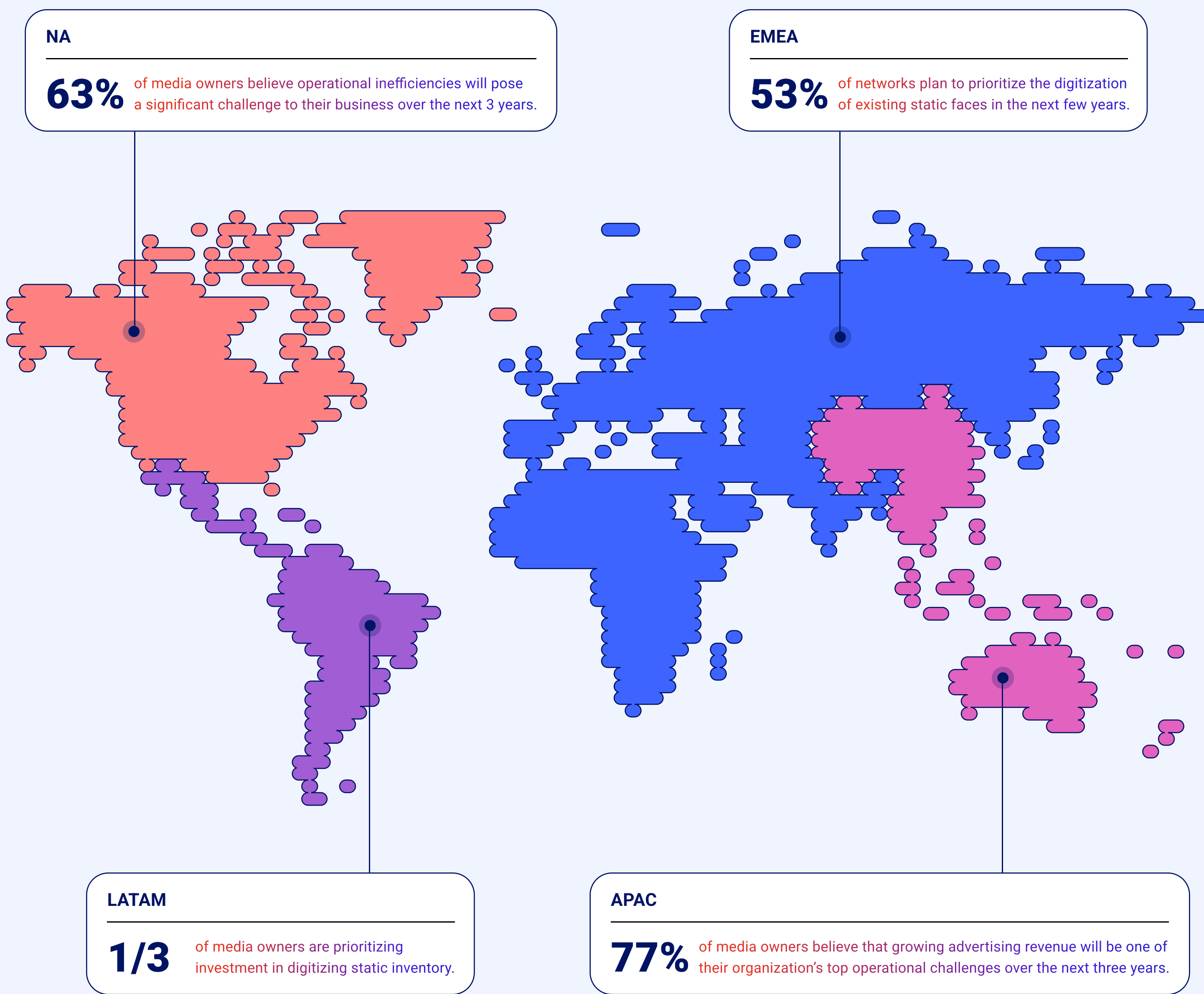
To successfully navigate the ever-evolving landscape of OOH, media owners must deftly balance the diverse needs of advertisers across their network, ensuring optimal utilization of available static faces, addressing regional variations in demand, and streamlining processes to maintain a cohesive and impactful experience for everyone involved.

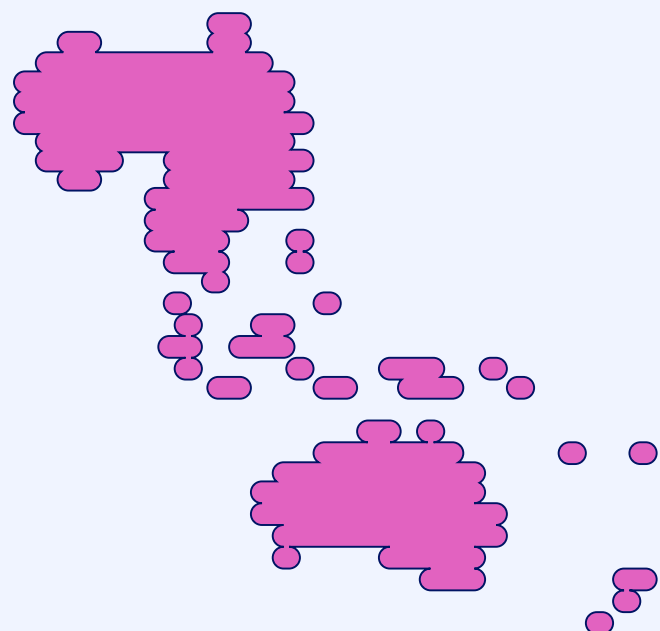## TOP TAKEAWAYS FROM THIS CHAPTER:

⊘ **Highlight on regional market profiles**
A snapshot of key insights, numbers, and market trends according to geographic region.

⊘ **With great size comes great(er) management responsibility**
While high levels of coordination and careful planning are prerequisites for running any kind of static OOH advertising network, certain management challenges intensify as the size of a network's static inventory expands.

HIGHLIGHT ON REGIONAL MARKET PROFILES

The static out-of-home advertising market remains strong across all regions, with global ad spending projected to reach US$21.57 billion by 2028[2]. But segmenting the market based on geographic location supplies valuable insights into regional market growth and offers OOH businesses a better understanding of regional consumption patterns and market sizes.

NA

63% of media owners believe operational inefficiencies will pose a significant challenge to their business over the next 3 years.

EMEA

53% of networks plan to prioritize the digitization of existing static faces in the next few years.

LATAM

1/3 of media owners are prioritizing investment in digitizing static inventory.

APAC

77% of media owners believe that growing advertising revenue will be one of their organization's top operational challenges over the next three years.
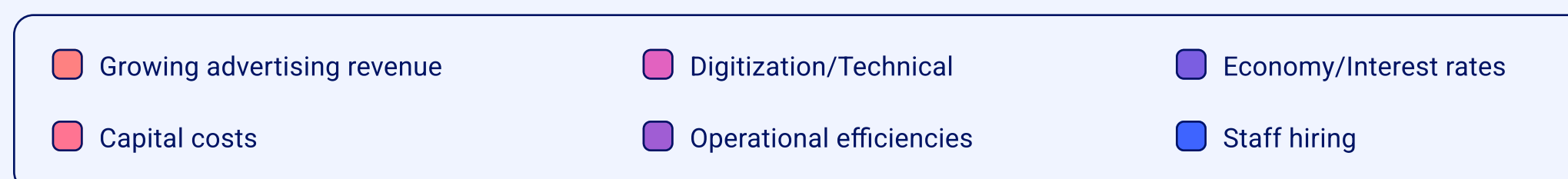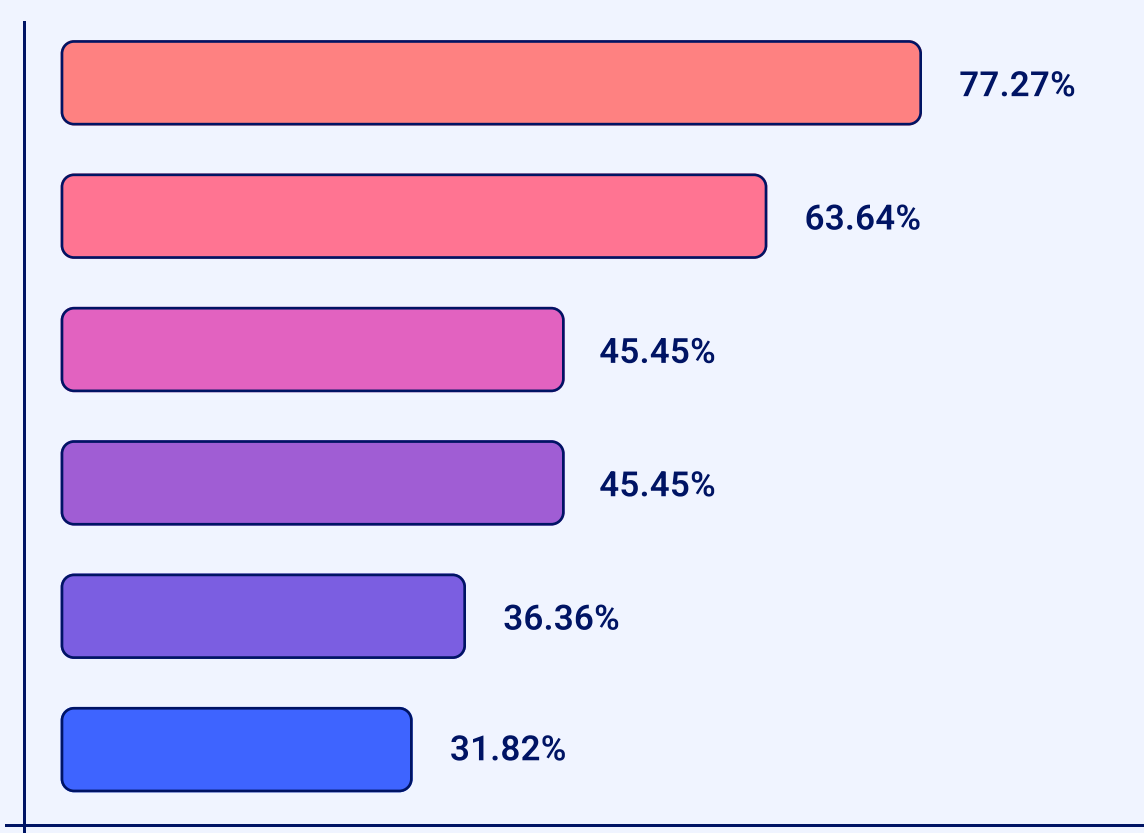
ASIA-PACIFIC (APAC)

In a global comparison, most ad spending will be generated in China, which is expected to show a compound annual growth rate (CAGR) of 2.55% and reach a projected market value of US$5.07bn — a little less than a quarter of the total worldwide market share — by 2028[3]. With so much expected market growth, it's not surprising, then, that static OOH media owners in the Asia-Pacific region are the most concerned with finding new ways to grow their business's advertising revenue.

According to our survey data, **77% of APAC-based media owners believe that growing advertising revenue will be one of their organization's top operational challenges over the next three years.**
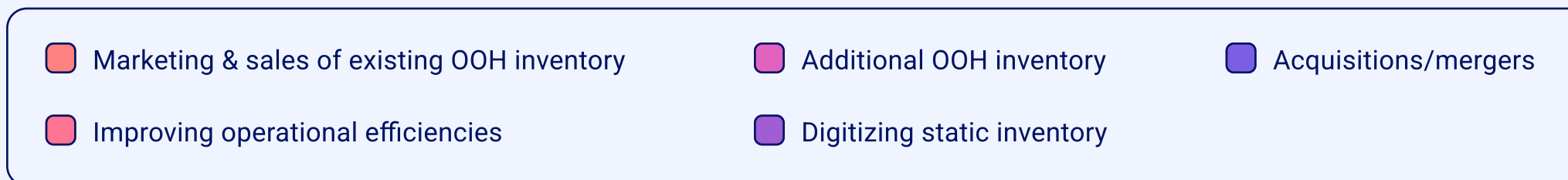
What APAC organizations see as their top operational challenges over the next 3 years
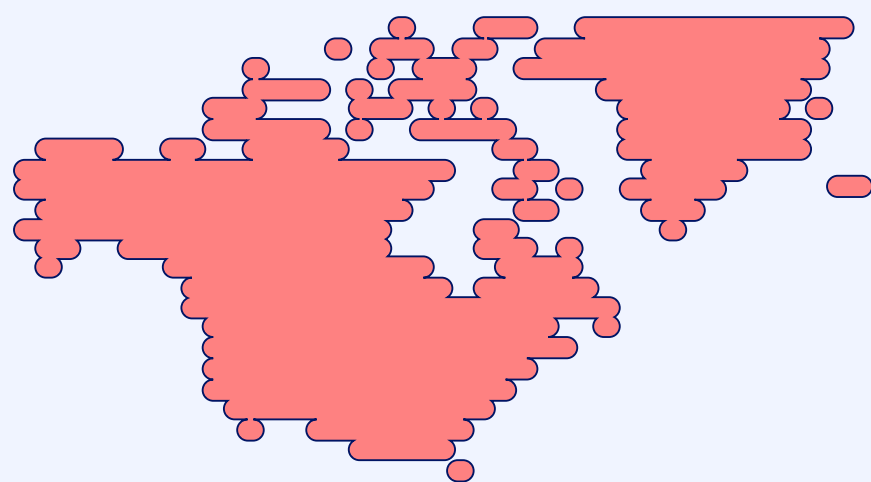
77.27%	
63.64%	
45.45%	
45.45%	
36.36%	
31.82%	

■ Growing advertising revenue   ■ Digitization/Technical   ■ Economy/Interest rates

■ Capital costs   ■ Operational efficiencies   ■ Staff hiring

In turn, they plan to prioritize investment in the marketing and sales of existing OOH inventory (73% of survey respondents) and in improving operational efficiencies (64% of survey respondents) more than any other region during a similar time period.

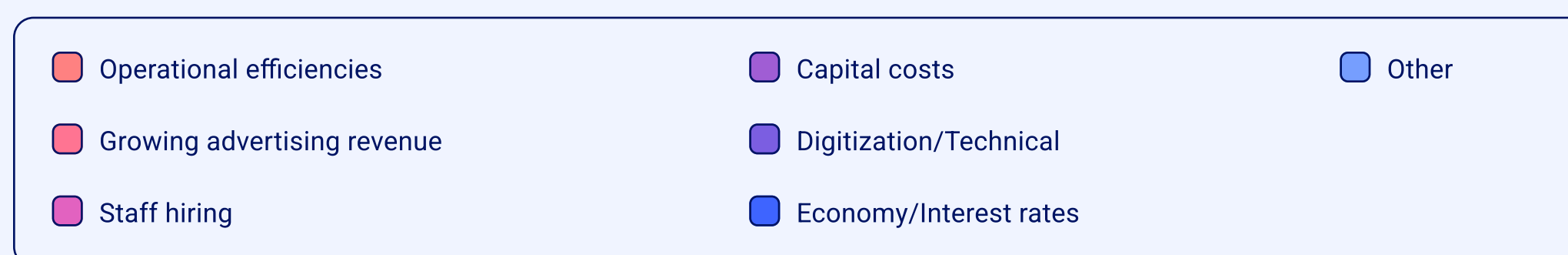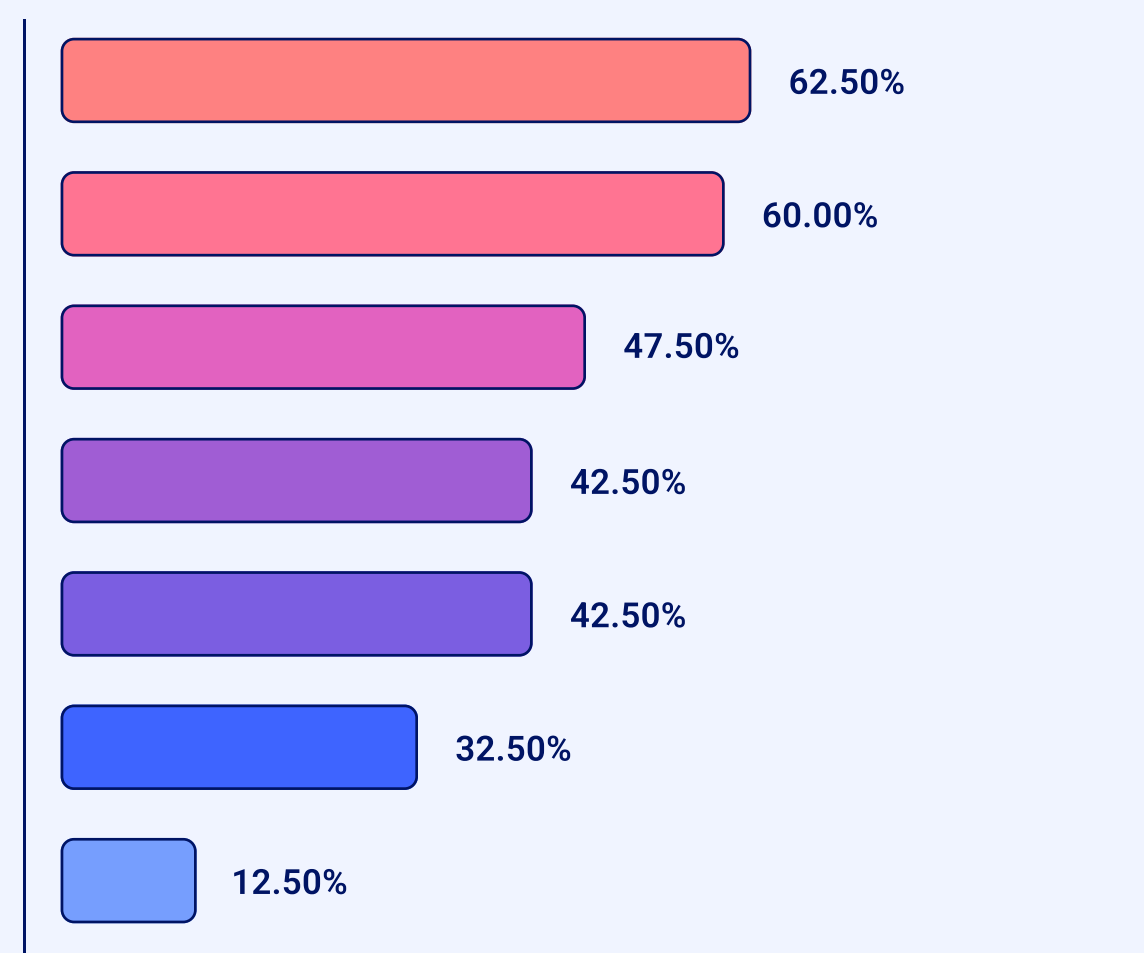Top priorities for business investment in the next 1-2 years

72.73%

63.64%

63.64%

36.36%

13.64%

- ⬤ Marketing & sales of existing OOH inventory
- ⬤ Additional OOH inventory
- ⬤ Acquisitions/mergers
- ⬤ Improving operational efficiencies
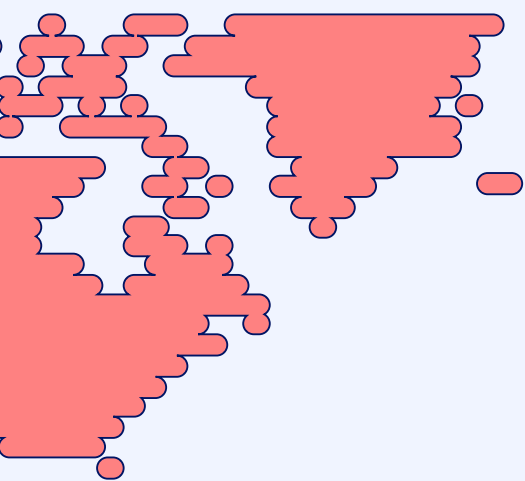- ⬤ Digitizing static inventory
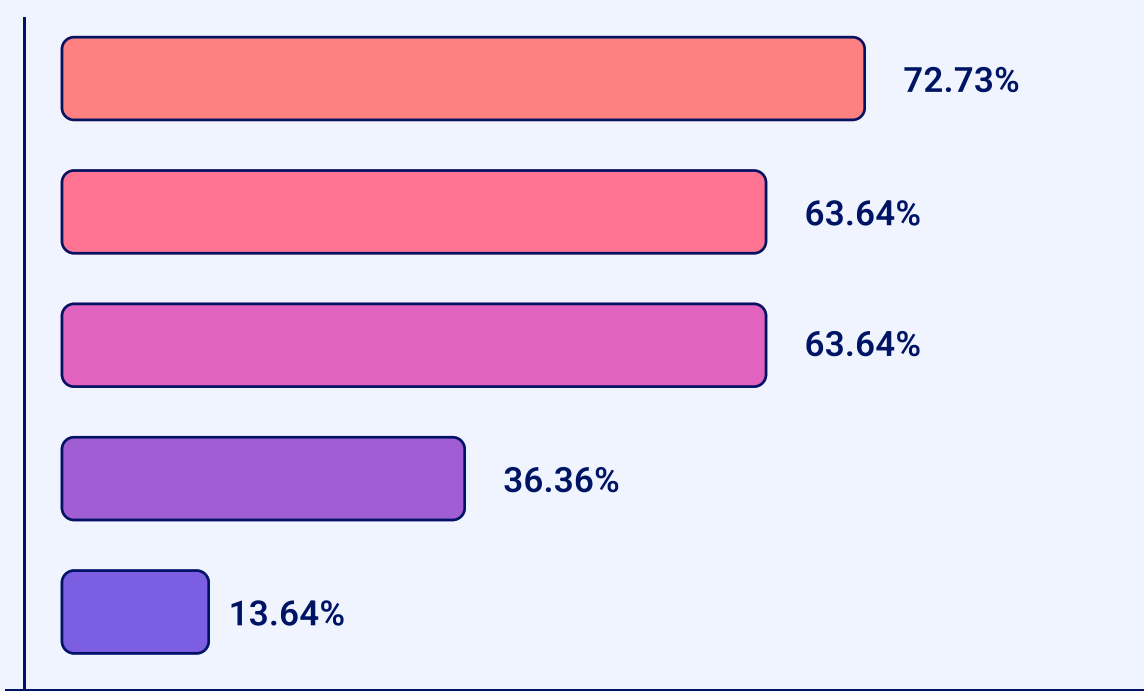
NORTH AMERICA (NA)

With static OOH already a mainstay in the North American market — accounting for close to 22% of worldwide traditional out-of-home ad spend in 2023[4] — the space is turning its attention to mergers and acquisitions more so than other regions. This may also help to explain why North American media owners appear to be more worried about operational inefficiencies hindering their future growth.

Along with growing advertising revenue, our survey data shows that **63% of Canadian and US media owners believe operational inefficiencies will pose a significant challenge to their business over the next 3 years.**

What NA organizations see as their top operational challenges over the next 3 years

|	
62.50%	
60.00%	
47.50%	
42.50%	
42.50%	
32.50%	
12.50%	

- Operational efficiencies
- Growing advertising revenue
- Staff hiring
- Capital costs
- Digitization/Technical
- Economy/Interest rates
- Other

A similar percentage say that improving such operational inefficiencies is a top investment priority for their business in the next 1-2 years.

Top priorities for business investment in the next 1-2 years

	67.50%
	62.50%
	60.00%
	42.50%
	35.00%
	10.00%
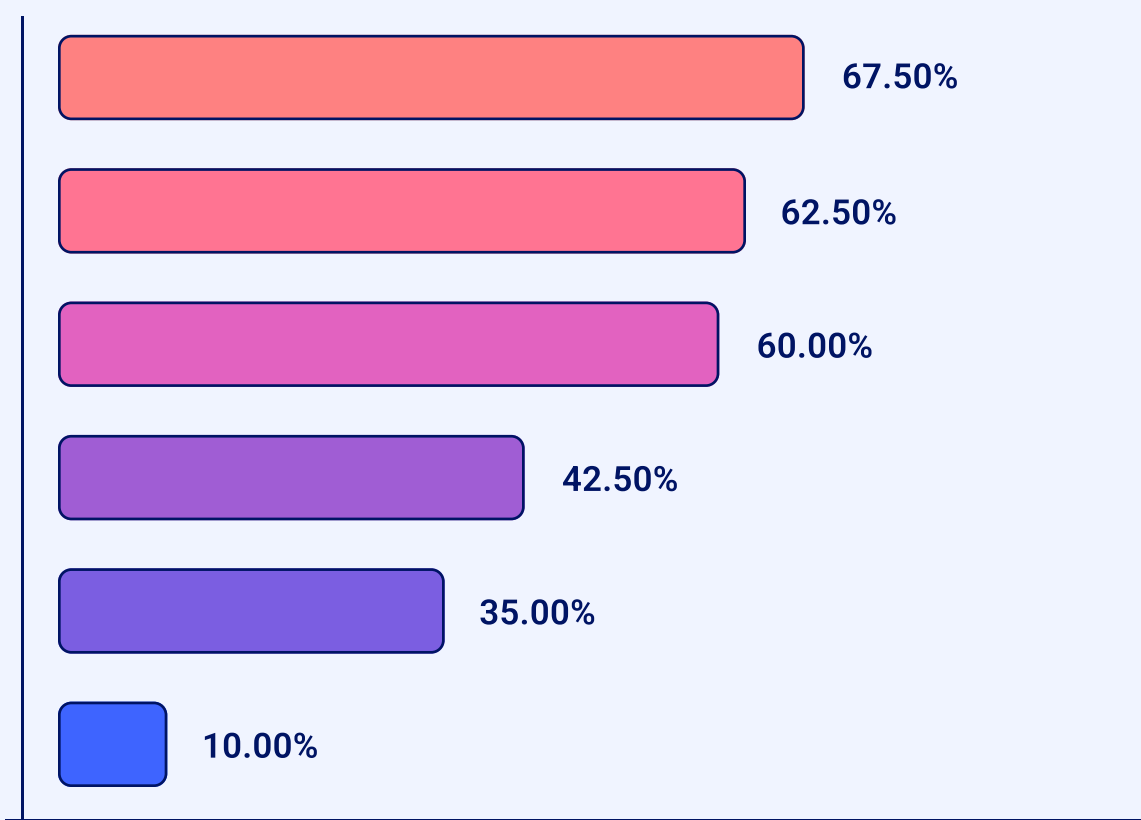
🔴 Additional OOH inventory   🟣 Digitizing static inventory

🔴 Improving operational efficiencies   🟣 Acquisitions/mergers

🟣 Marketing & sales of existing OOH inventory   🔵 Other (please specify)

EUROPE, MIDDLE EAST, AND AFRICA (EMEA)
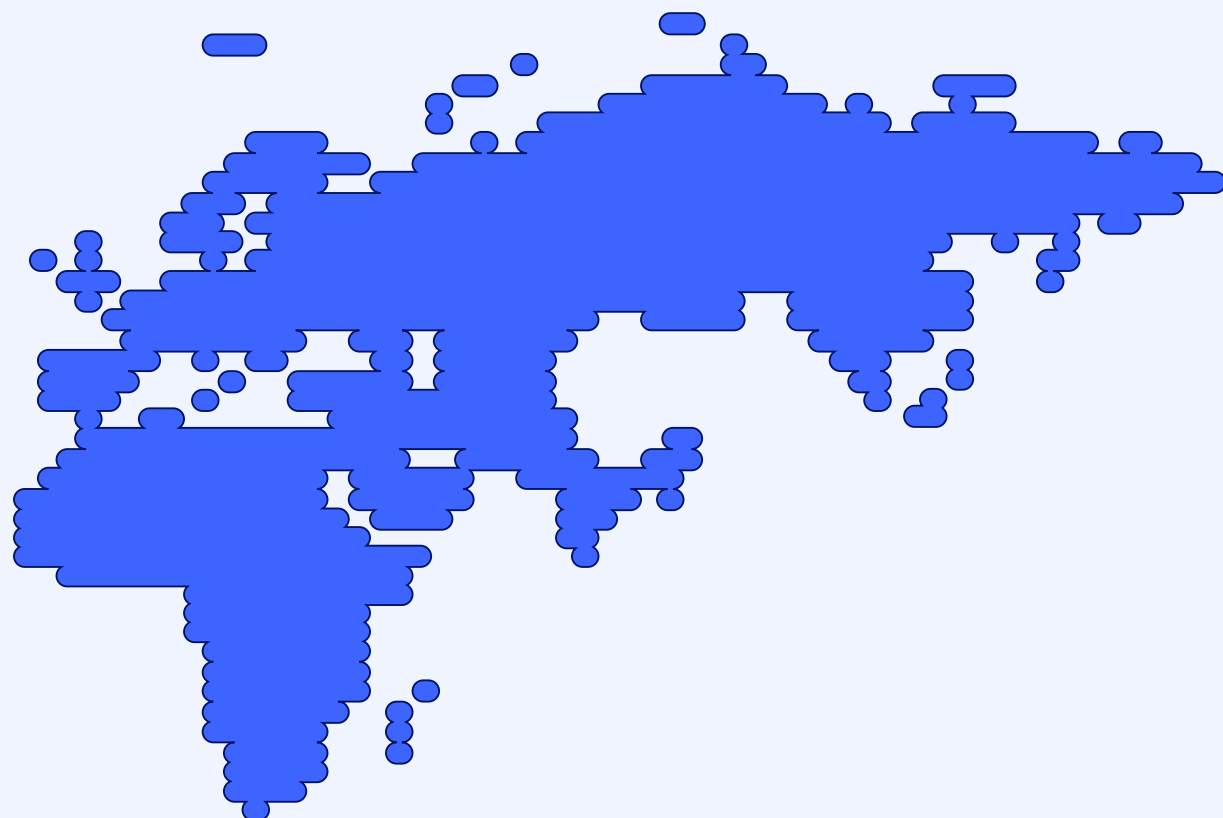
Although hampered due to the Covid-19 pandemic, OOH appears to be growing from strength to strength across EMEA. In the UK and Germany, the medium is on the cusp of returning to pre-pandemic levels — though that can be attributed, at least in part, to these countries' continued investment in digital screens[5].

While static OOH remains strong throughout the region, this increased focus on digitization was reflected in our own survey data, which showed that **53% of EMEA-based networks plan to prioritize the digitization of existing static faces in the next few years.** However, only 10% of those networks intend to digitize more than half their existing static inventory.

Percentage of existing static inventory EMEA networks intend to digitize in the future

0%	1-25%	26-50%	51-100%
7.50%	62.50%	20.00%	10.00%
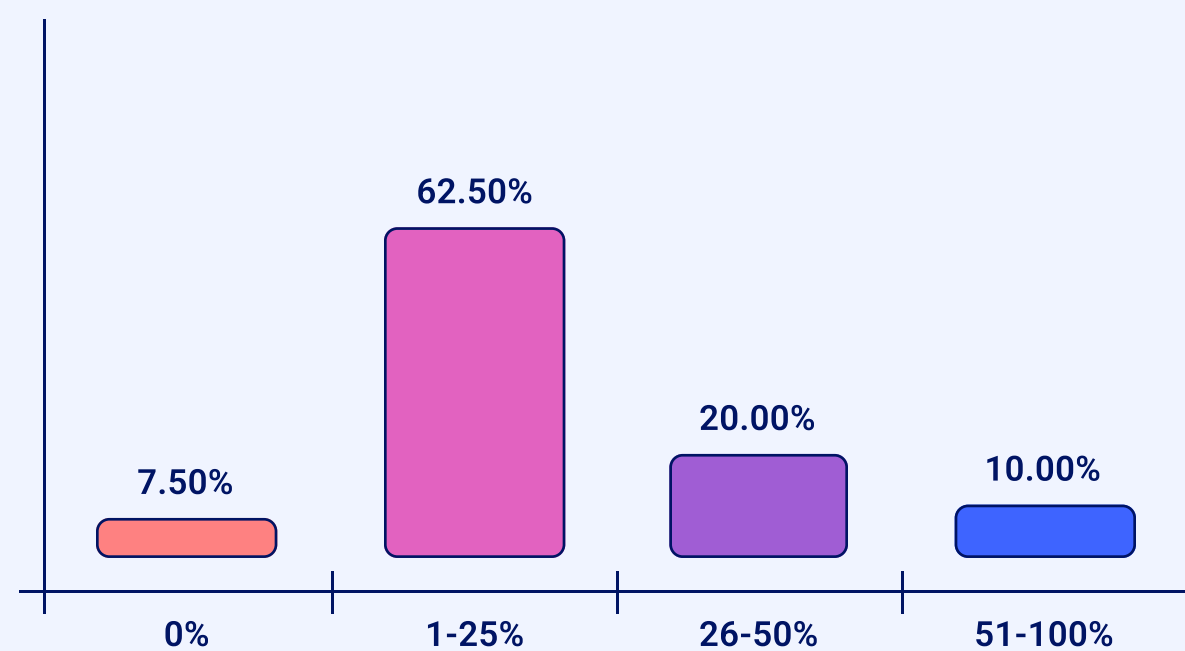
50% of EMEA-based companies still use spreadsheets to manage their traditional out-of-home inventory.
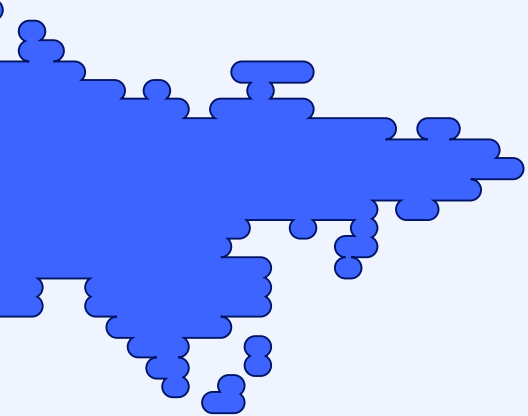
Moreover, media owners in this region — half of whom still use spreadsheets to manage their static OOH inventory, according to our survey — are equally keen to invest in improving operational efficiencies.

Top priorities for business investment in the next 1-2 years

Priority	Percentage
	52.50%
	52.50%
	52.50%
	45.00%
	27.50%
	5.00%

- 🟧 Digitizing static inventory
- 🟪 Additional OOH inventory
- 🟥 Marketing & sales of existing OOH inventory
- 🟪 Acquisitions/mergers
- 🟪 Improving operational efficiencies
- 🟦 Other (please specify)

LATIN AMERICA (LATAM)
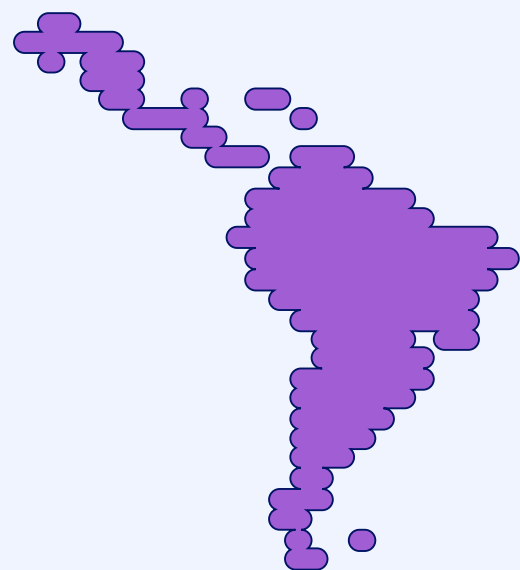
As with the preceding markets, OOH has surged across LATAM in recent years. Regional out-of-home ad spending is estimated to have surpassed US$1.4 billion in 2023 — and the largest market segment, accounting for 66% of total revenue, was traditional out-of-home advertising[6].

LATAM-based respondents to our survey seemed to be a bit less pressed about digitizing their existing static OOH faces. **Only a third of the Latin American media owners we surveyed are prioritizing investment in digitizing static inventory**, even while saying they're very concerned about growing advertising revenue.

Top priorities for business investment in the next 1-2 years
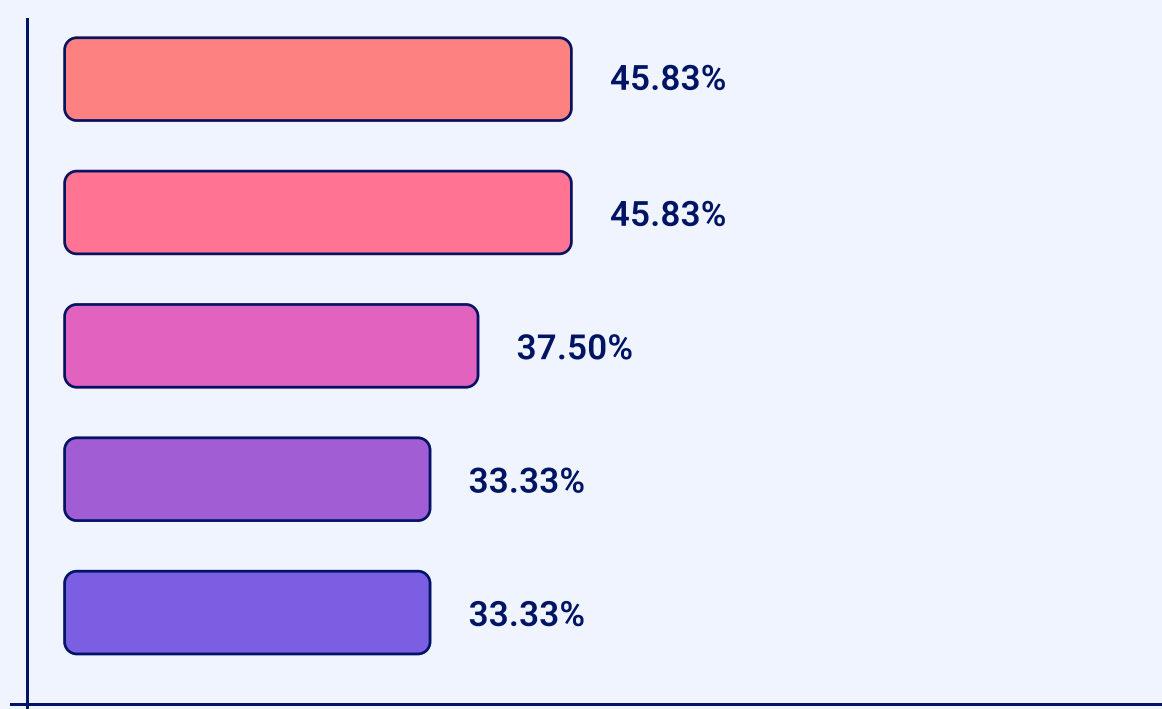
● Additional OOH inventory	● Acquisitions/mergers
● Improving operational efficiencies	● Digitizing static inventory
● Marketing & sales of existing OOH inventory	

1/3 of the Latin American media owners we surveyed are prioritizing investment in digitizing static inventory
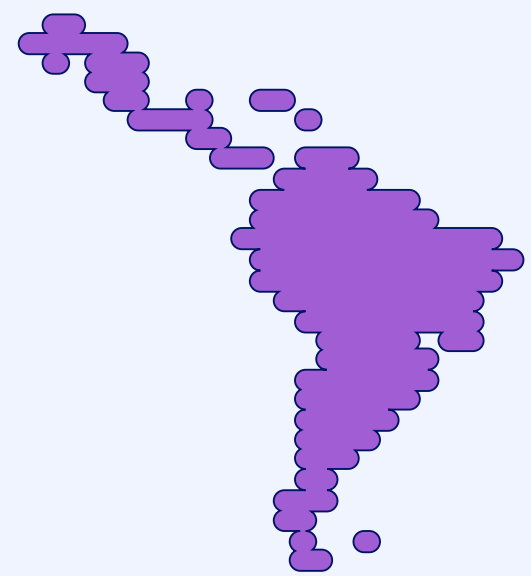
Digitization also seems to be a longer-term goal in LATAM compared to other regions, with roughly 33% of surveyed networks that do have digitization plans saying they don't intend to fully implement them until another five or more years down the road.

Time period over which LATAM media owners plan to carry out digitization efforts

20.83%

45.83%

33.33%

0%

1-2 years **2-5 years** **5+ years** **N/A**
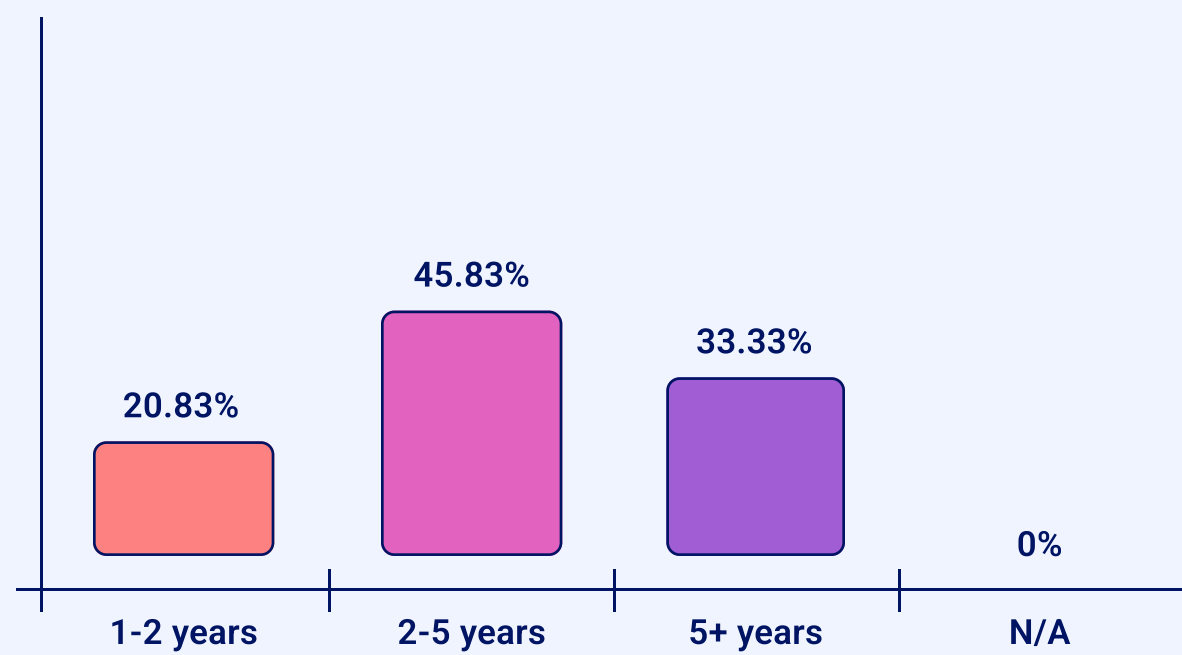
WITH GREAT SIZE COMES GREAT(ER) MANAGEMENT RESPONSIBILITY

Running any kind of static out-of-home media network requires meticulous planning and high levels of coordination. However, certain areas of static OOH management become significantly more difficult for leaders to contend with as their network increases in size.

On average, **proof-of-performance (PoP) and proposal management are +120% more likely to cause headaches for larger networks (1,501+ static faces)** than their smaller counterparts, according to our survey data. Our survey also shows a direct correlation between network size and the difficulty of managing work orders and charting.

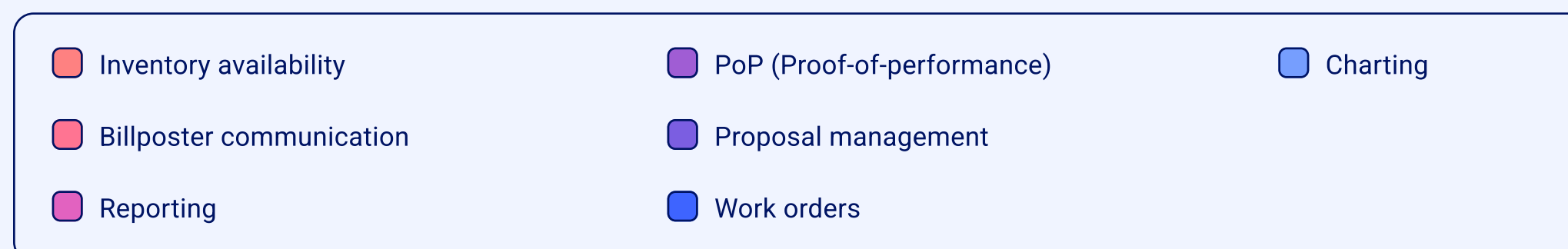It's not surprising, then, that larger networks are more concerned with improving operational efficiencies, with over 68% of surveyed networks with 1,500+ static faces saying this is a top investment priority for their business within the next 1-2 years. Meanwhile, smaller networks (1-1,500 static faces) were shown to be more aggressive when it comes to securing additional OOH inventory.

Areas of static OOH management that give networks the most headaches

SMALLER NETWORKS (1-1,500 FACES)

	45.45%
	27.27%
	27.27%
	22.73%
	22.7%
	22.7%
	13.64%

🟥 Inventory availability   🟪 PoP (Proof-of-performance)   🔵 Charting

🟥 Billposter communication   🟣 Proposal management
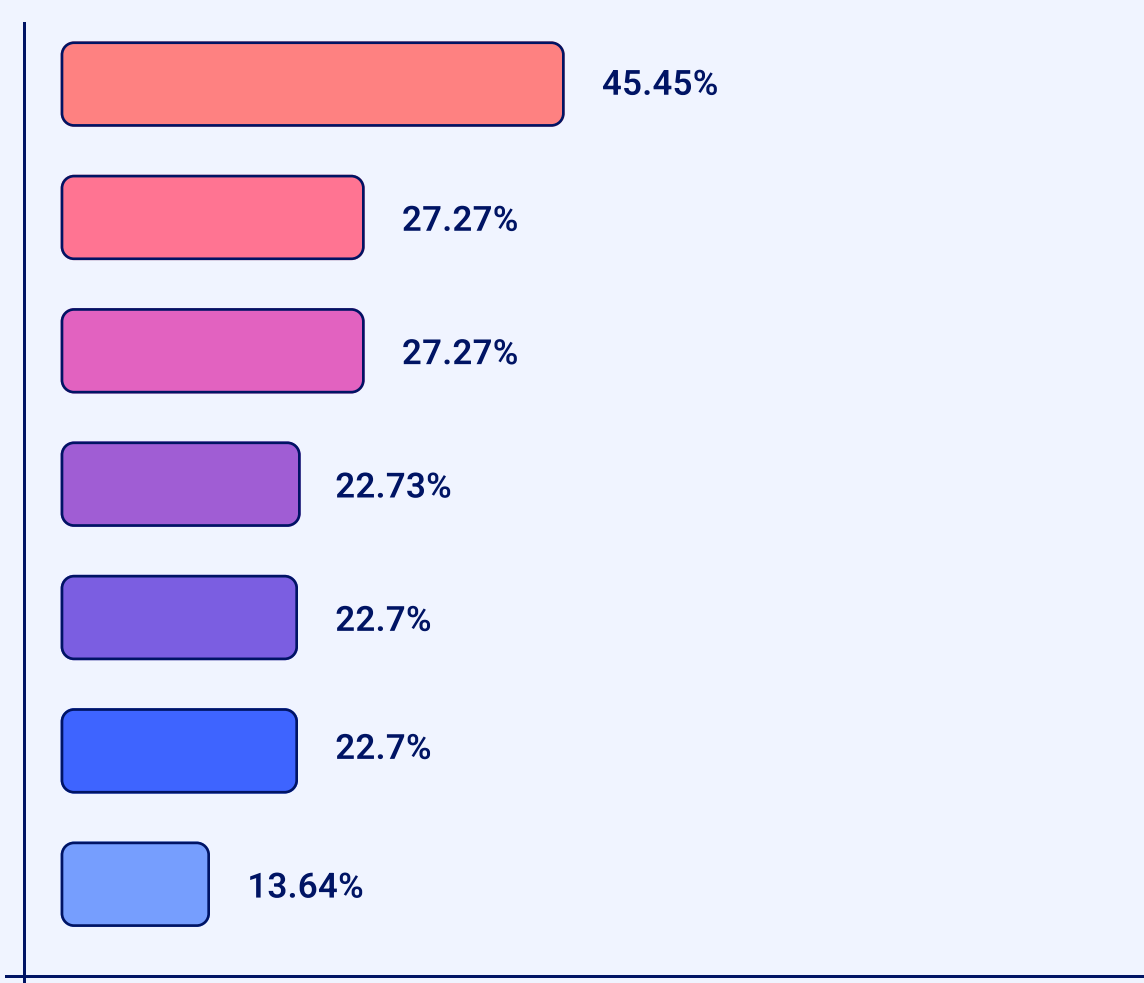
🟪 Reporting   🔵 Work orders

Areas of static OOH management that give networks the most headaches

LARGER NETWORKS (1,500+ FACES)

	50%
	50%
	50%
	29.17%
	25%
	25%
	16.67%

🟥 Inventory availability   🟪 Work orders   🟦 Reporting

🟥 Proposal management   🟪 Charting

🟥 PoP (Proof-of-performance)   🟦 Billposter communication
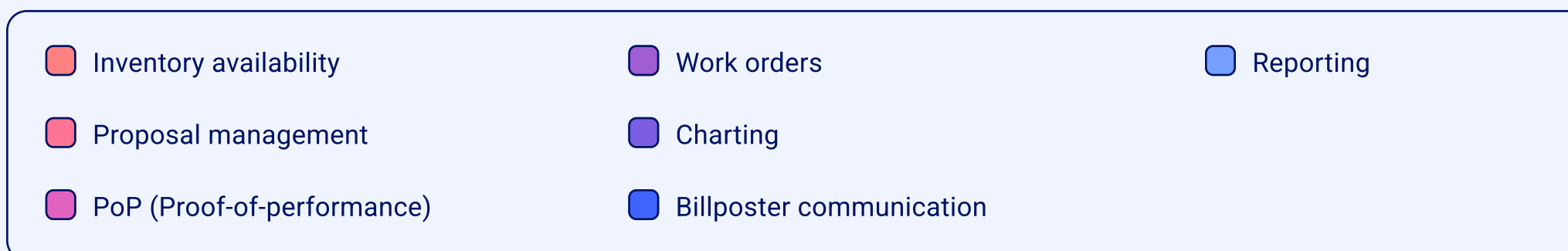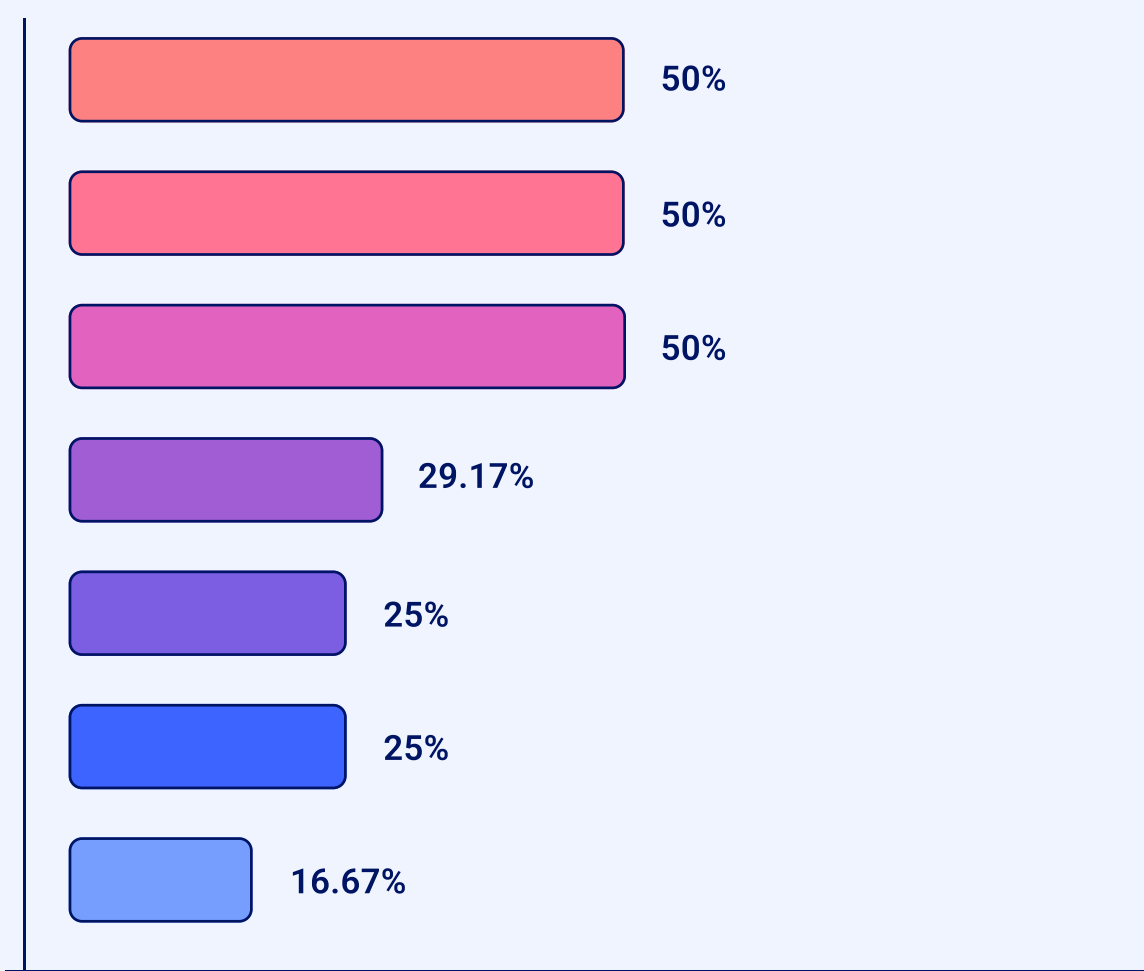
STREAMLINING TIME-CONSUMING STATIC WORKFLOWS IS NOW IMPERATIVE
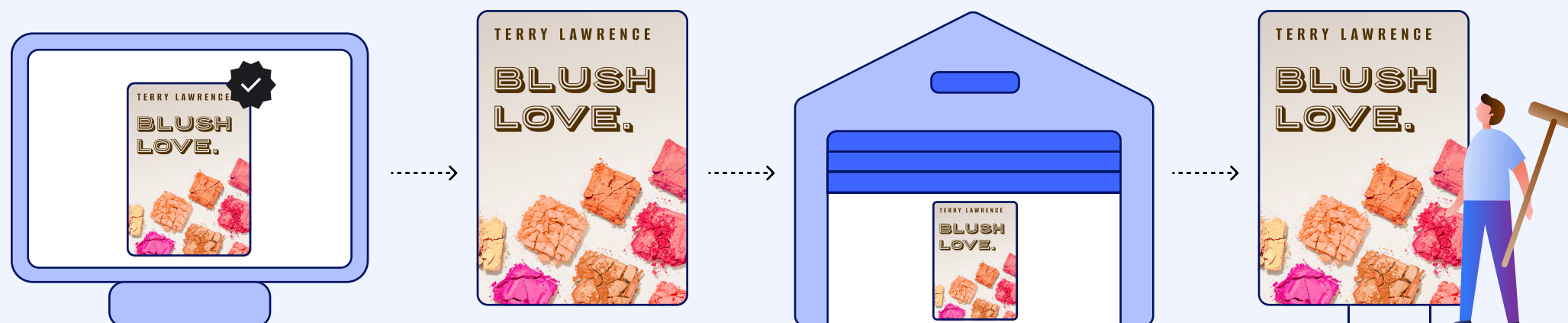
The intricate processes that once defined the creation and deployment of static OOH campaigns are undergoing a transformative shift. There's a growing awareness amongst media owners that more efficient workflows are not just desirable, but have become a strategic necessity for the continued growth of their business — a perspective that's reinforced by the results of our survey, which found that 53% of static out-of-home media owners see operational inefficiencies as one of their organization's top barriers to future growth. The key takeaway from our analysis is clear: **in a fast-paced digital age, static media owners embracing streamlined workflows stand to gain a competitive edge.**

What's important now — and moving forward — is for OOH organizations to integrate the tools and processes needed to capitalize on the immediacy and responsiveness that modern audiences, and thus advertisers, have come to expect. To successfully adapt to this paradigm shift, media owners must prioritize efficiency in their static workflows and day-to-day operations to meet these evolving demands.

TOP TAKEAWAYS FROM THIS CHAPTER:

⊘ **New challenges to delivering static OOH**
Today's OOH networks are concerned about the impact these operational challenges could have on their bottom line in the next few years.

⊘ **Demand for complex, out-of-the-box creative is high**
Advertisers are asking for more complex—and thus more time-consuming to cross-coordinate and produce—static OOH executions.

⊘ **Companies need to address costly inefficiencies**
Organizations are struggling to manage their end-to-end static workflows and PoPs efficiently.
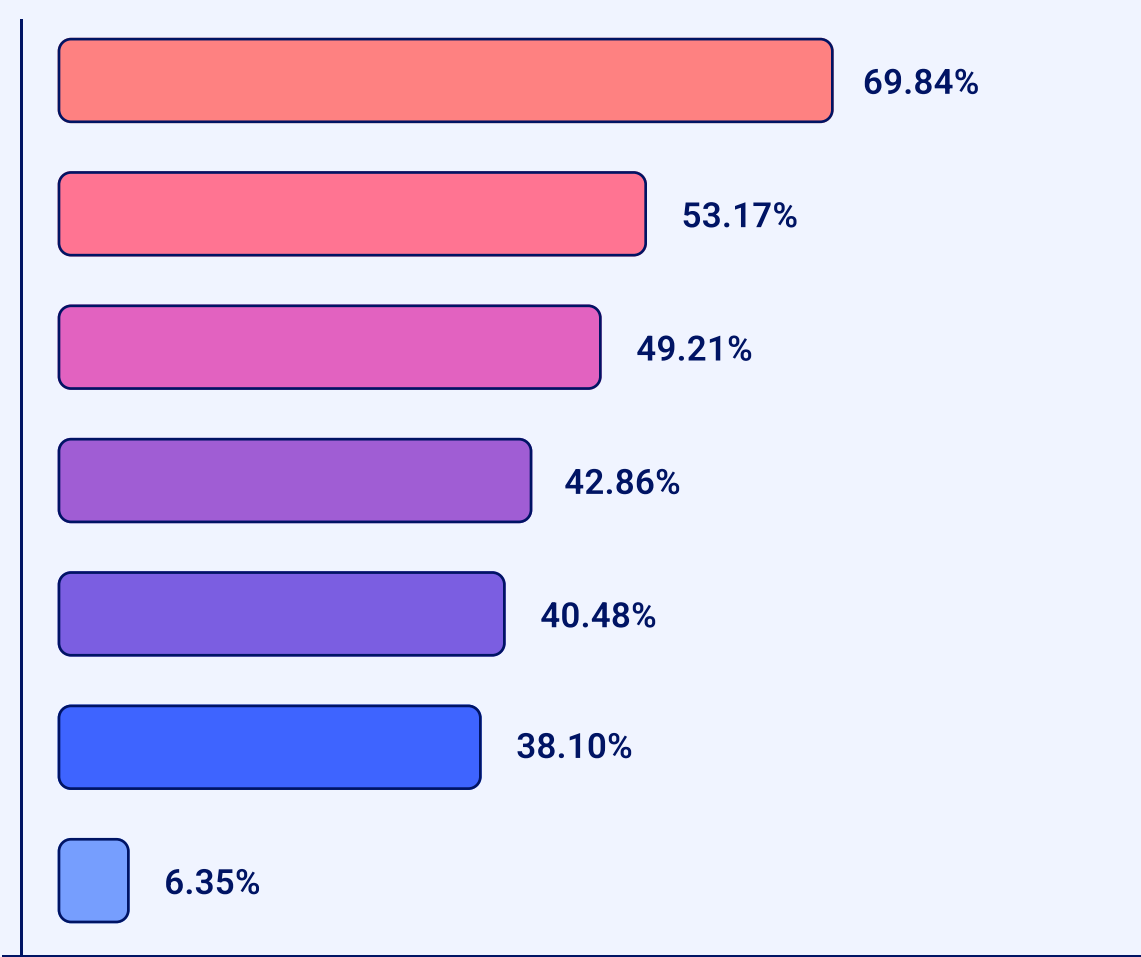
NEW CHALLENGES TO DELIVERING STATIC OOH

In an era marked by technological acceleration, the conventional workflows associated with static OOH campaigns are facing new hurdles. Alongside media owners' ongoing desire to grow advertising revenue, it turns out that operational inefficiencies pose one of the biggest challenges to their future business success.

53% **of the static OOH media owners that we surveyed feel that operational inefficiencies are putting them at a competitive disadvantage**

Today, offline media channels dominate the ad preference rankings for consumers, with both traditional and digital out-of-home making the top 5 most preferred ad platforms for consumers worldwide in 2023[7]. While marketers' enthusiasm about digital OOH (DOOH) was on par with consumers', their trailing interest in static OOH could be the result of archaic processes and slow turnaround times.

What organizations see as their top challenges operationally over the next 3 years

| Challenge	Percentage
Growing advertising revenue	69.84%
Operational efficiencies	53.17%
Digitization/Technical	49.21%
Capital costs	42.86%
Economy/Interest rates	40.48%
Staff hiring	38.10%
Other	6.35%

Legend:
- Growing advertising revenue
- Operational efficiencies
- Digitization/Technical
- Capital costs
- Economy/Interest rates
- Staff hiring
- Other

DEMAND FOR COMPLEX, OUT-OF-THE-BOX CREATIVE IS HIGH

Advertiser preferences and campaign requests are continually evolving, making projects more and more complex in their never ending quest to capture consumer attention and enhance engagement and ad recall. This poses a particular challenge to the static OOH media owners we surveyed, 37% of whom still use spreadsheets or slides to manually manage their static inventory.

The high demand for non-standard — and thus, more complicated and time-consuming — projects in the static out-of-home advertising industry is confirmed by the results of our survey, which showed that a whopping **94% of participating media owners receive more sophisticated requests like these at least a few times a year.** Nearly 5% of survey respondents report receiving them daily.

Frequency of requests for non-standard static OOH executions (e.g. with embellishments or extensions)

Not at all	A few times a year	Monthly	Weekly	Daily
6.35%	38.89%	33.33%	16.67%	4.76%
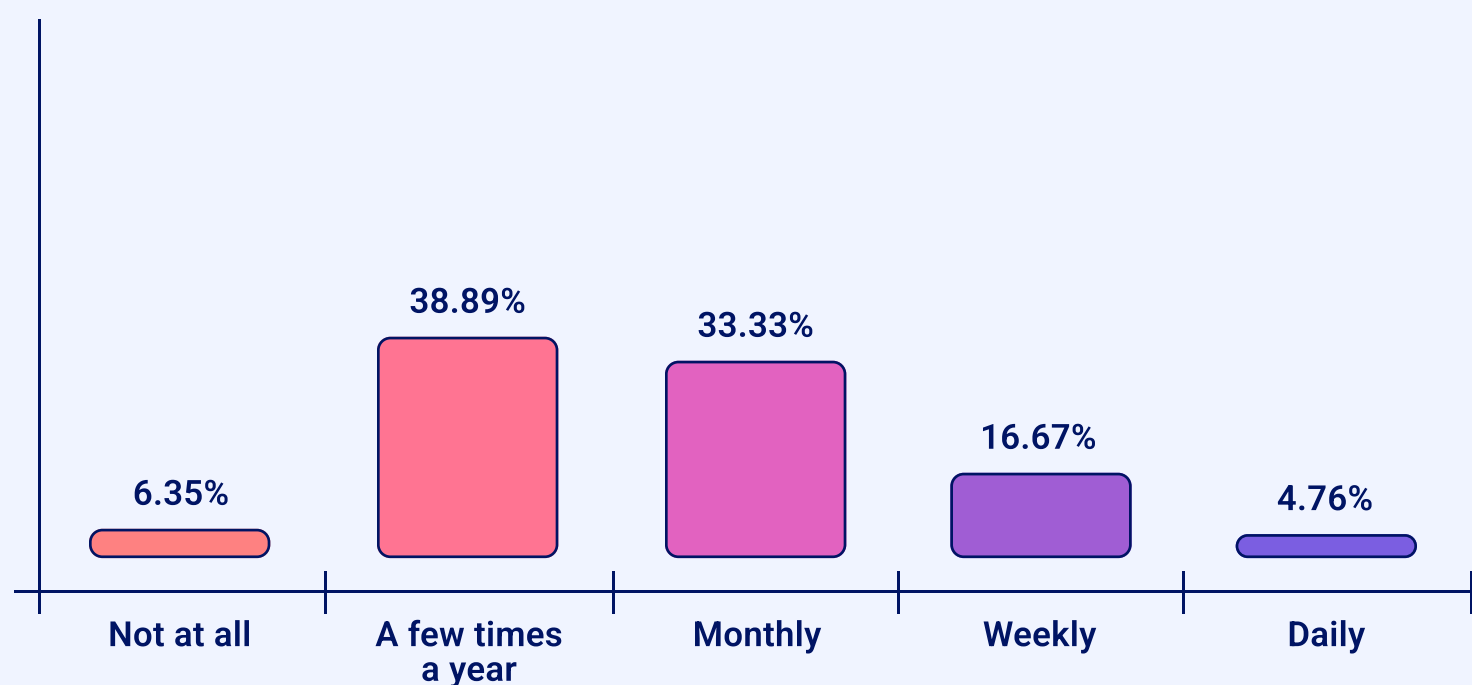
As media owners navigate this high demand, the ability to deliver on increasingly intricate and creative static OOH executions will be an undeniable asset. Successful networks will find innovative ways to balance creativity with efficiency, offering clients the distinctive campaigns they desire without compromising the timely delivery and effectiveness of static OOH content.

94% of participating media owners receive more sophisticated requests like these at least a few times a year

Since static billboards are typically a long-term commitment requiring a vinyl or a paper installation and mutual setup, brands can leverage creative opportunities not available in digital, such as adding 3d extensions or custom embellishments.

¹ Source: The Super Mario Bros. movie via Clio Entertainment

² Source: Barbie movie via Ooh! Media

³ Source: Aldi via Brand the change

⁴ Source: The Super Mario Bros. movie via Famous Campaigns
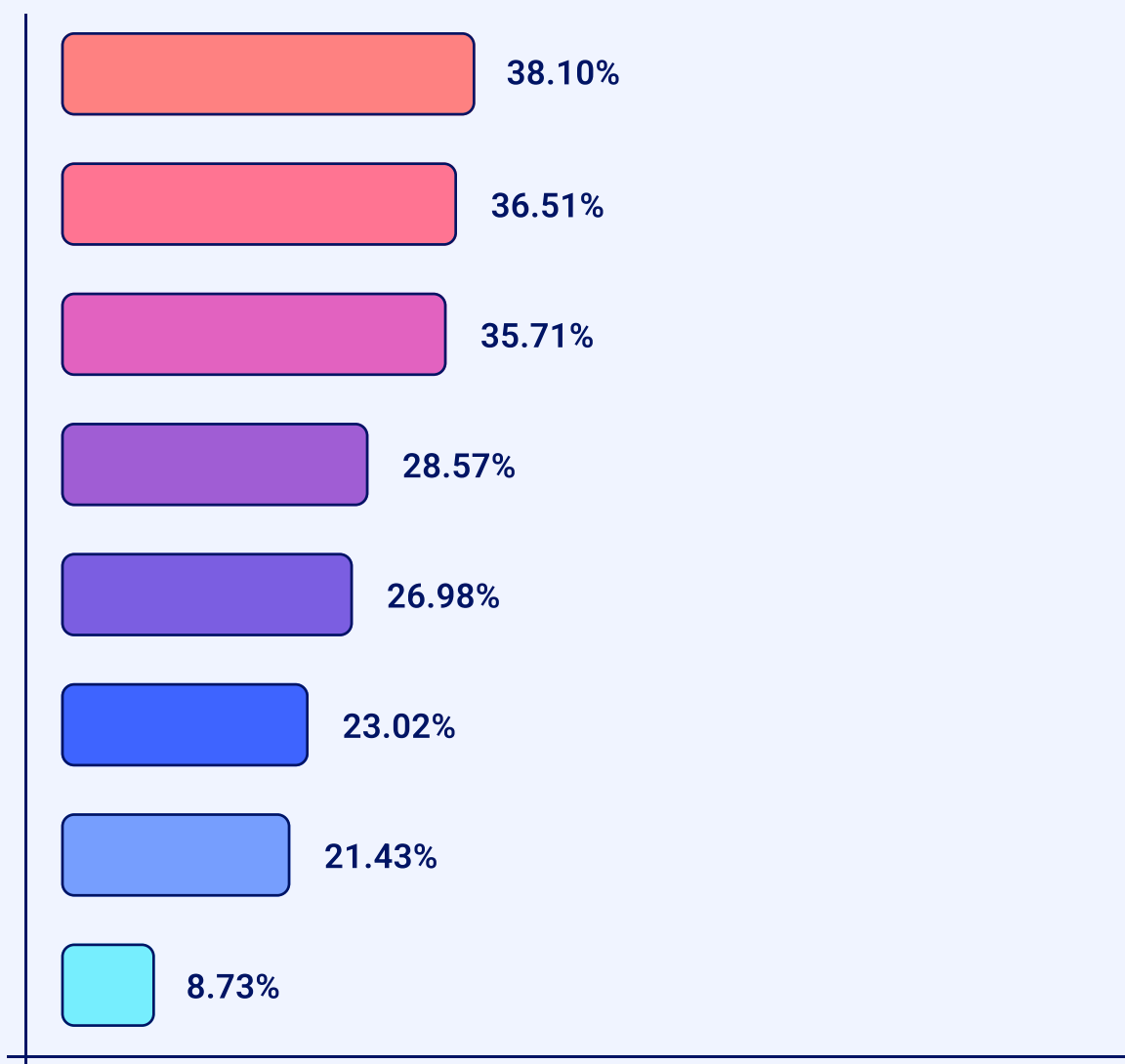
⁵ Source: Minute Maid via The Drum

COMPANIES NEED TO ADDRESS COSTLY INEFFICIENCIES

Today's media owners find themselves at a crossroads where operational efficiency is paramount to future growth.

In the quest for optimal performance, networks with static OOH inventory must confront the challenges posed by outdated inventory tracking systems, manual proposal processes, and the need for more streamlined methods of providing proof-of-performance (PoP) to advertisers.

The need for improved operational efficiency is further reinforced by static OOH media owners' less-than-optimum sentiment towards the current coordination of internal teams. **Across all survey respondents, only 17% feel their organization already operates as a well-oiled machine.** Nearly half still see room for improvement before they'd consider their coordination efforts "strong".

Areas of static OOH management that give media owners the most headaches

Inventory availability	38.10%
Proposal management	36.51%
PoP (Proof-of-performance)	35.71%
Work orders	28.57%
Billposter communication	26.98%
Reporting	23.02%
Charting	21.43%
Others (please specify)	8.73%

Legend:
- Inventory availability
- Proposal management
- PoP (Proof-of-performance)
- Work orders
- Billposter communication
- Reporting
- Charting
- Others (please specify)

How well-coordinated media owners feel their internal teams are in delivering static OOH campaigns

3.7 ★★★★☆

ADVANCED TECHNOLOGY COMES TO STATIC OOH
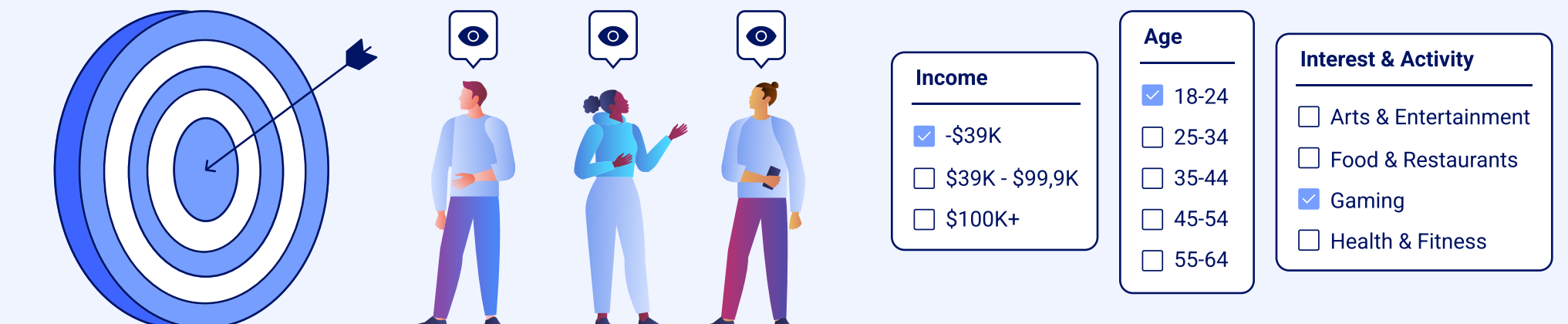
On the surface, the static billboard industry might appear relatively unchanged. But peel back the vinyl and you'll find a whole lot of innovation going on. Technological advancements now allow for data-driven content targeting while the inclusion of interactive elements can further enhance engagement and increase the overall impact of multi-channel ad campaigns. At the same time, major improvements have been made on the back end, with the implementation of operational technology that can support everything from sales to installation. **In this era of digital transformation, traditional OOH media owners that embrace technological innovation are proving that this industry is anything but static.**

For media owners who want their static business to stand out and scale up, taking the time to invest in the right technology now is sure to pay off in the future. In short, today's technological innovations have the power to revolutionize all aspects of out-of-home advertising — including static OOH — delivering unparalleled efficiency, effectiveness, and value to every campaign while increasing opportunities for advertising companies and network owners alike.

TOP TAKEAWAYS FROM THIS CHAPTER:

⊘ **Necessity of adopting automation**
Organizations are prioritizing investment in systems or software that will improve operational efficiency across their network.

⊘ **Demand for real-time, all-in-one asset management**
Real-time inventory insights and the ability to manage both digital and static OOH from one place has become crucial amidst a rising number of "hybrid" networks.

⊘ **Data-driven solutions hold the key to future growth**
Companies believe that access to improved data and analytics will play a key part in shaping the industry's future trajectory.

NECESSITY OF ADOPTING AUTOMATION

Technology priorities tend to vary from one static OOH business to another, likely because they're all at different stages of building out their technical infrastructure. But **one thing almost all static media owners we surveyed share is the belief that their business would benefit from incorporating additional automation into their processes.**
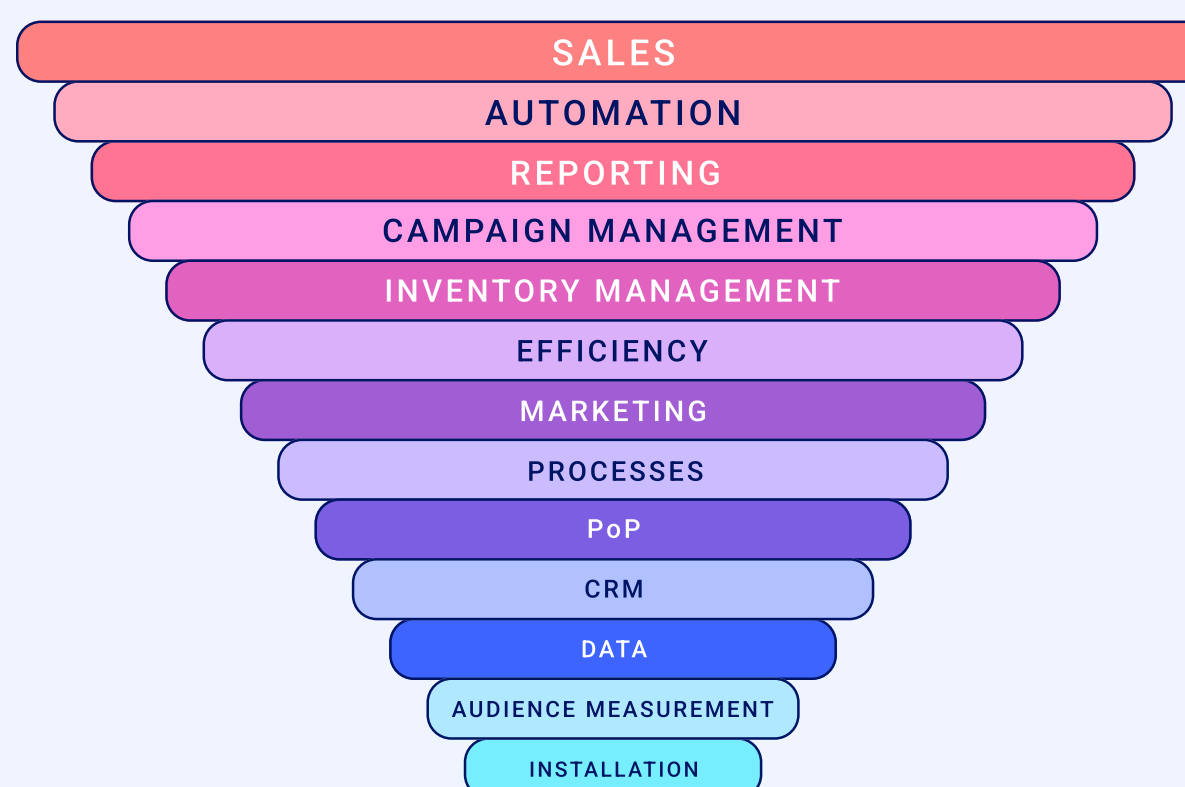
Percentage of media owners that feel there's still room to automate more of their regular tasks in the proposal to posting process for static OOH campaigns

NO
12.70%

YES
87.30%
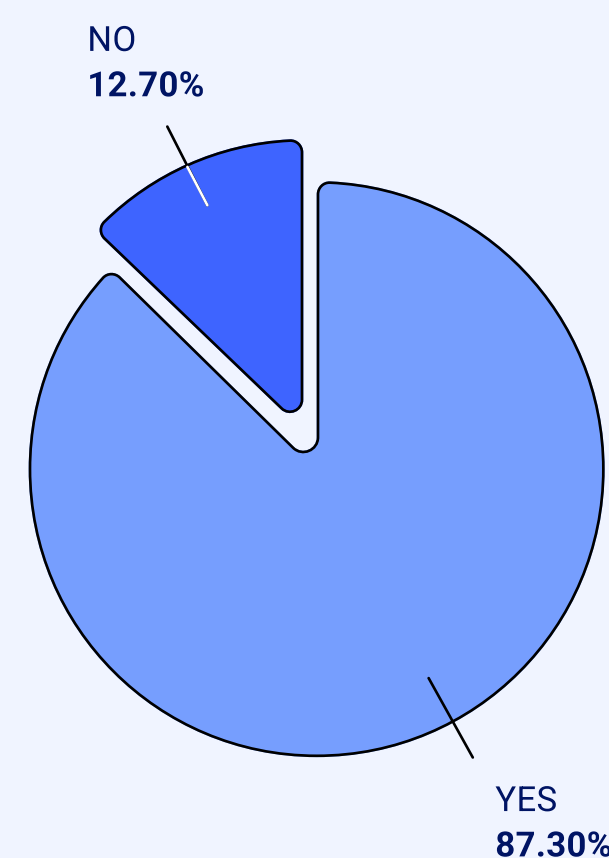
While everyone loves a good spreadsheet, that love tends to vanish pretty quickly when trying to juggle multiple complex contracts, design and print jobs, and posting and maintenance schedules all at the same time.

Thankfully, dedicated OOH management platforms exist to streamline all of this, gathering real-time inventory and pricing information, developing proposals, and completing sales in just a few clicks. They can also generate print schedules, work orders, and client reporting automatically — ensuring campaigns get out the door faster and delivering convenience, consistency, and clarity.

Where static OOH networks
see room for improvement

SALES
AUTOMATION
REPORTING
CAMPAIGN MANAGEMENT
INVENTORY MANAGEMENT
EFFICIENCY
MARKETING
PROCESSES
PoP
CRM
DATA
AUDIENCE MEASUREMENT
INSTALLATION

DEMAND FOR REAL-TIME, ALL-IN-ONE ASSET MANAGEMENT

In today's dynamic advertising landscape, the ability to respond swiftly to market changes and capitalize on emerging opportunities is a competitive necessity. Recognizing the imperative of immediacy, static OOH companies are increasingly placing a premium on software solutions that provide real-time insights into their inventory availability.

Top 3 features companies look for in a static OOH management tool
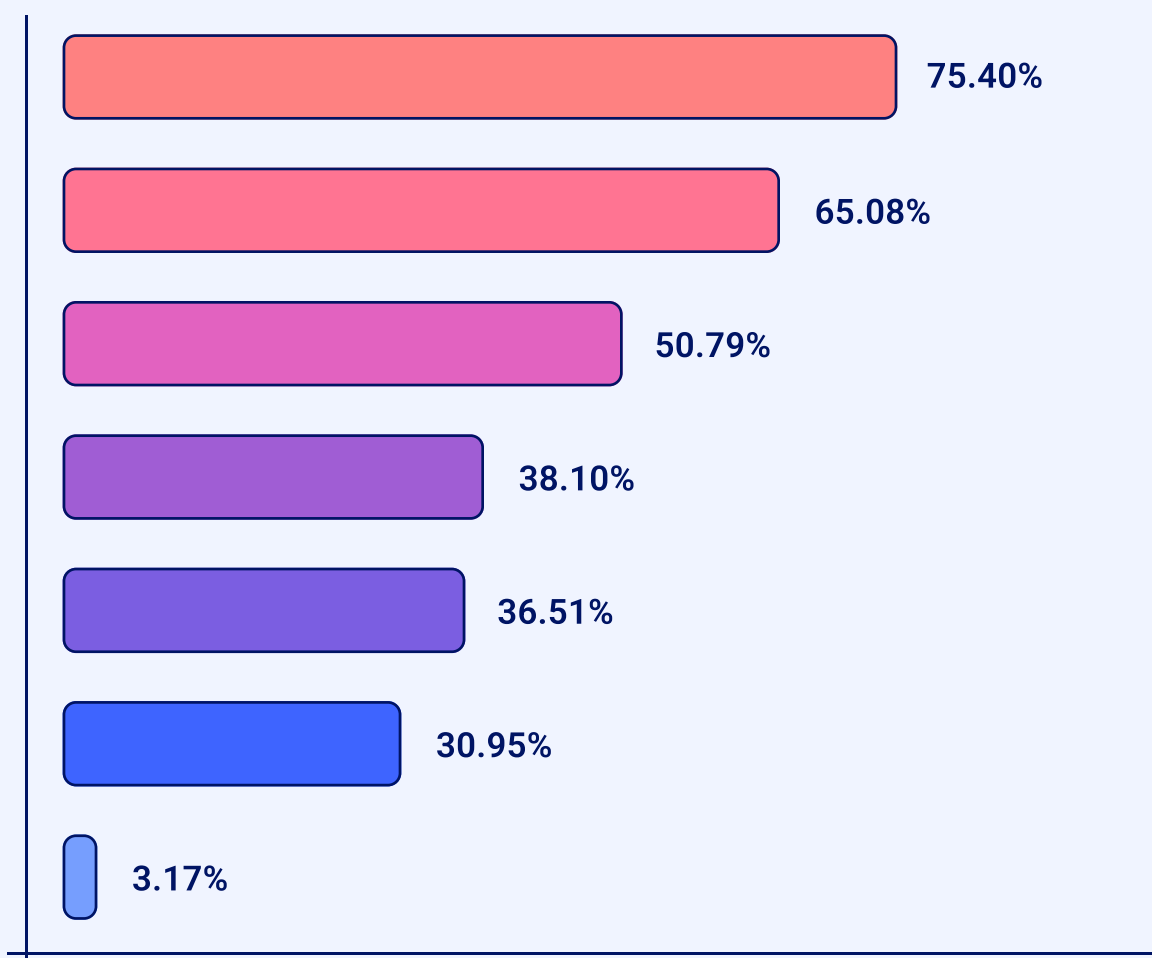
	75.40%
	65.08%
	50.79%
	38.10%
	36.51%
	30.95%
	3.17%

● Real-time Inventory availability	● Contact & account management	● Other (please specify)
● Effective charting	● Operations management	
● Proposal building	● Design and delivery tracking	

75% **of survey respondents cite real-time inventory availability as one of the top features they look for in a static OOH management tool**

At the same time, the demand for solutions that can seamlessly handle both digital and static OOH is becoming more pronounced, especially with the anticipated rise of hybrid networks that blend traditional and digitized inventory. Over 68% of static media networks surveyed recognized the importance of consolidating their management processes within a single, integrated platform. A third classified this capability as "very important".

Importance of being able to manage digital and static OOH from within a single platform

3.17%

12.70%

15.87%

34.92%

33.33%

| ■ Not at all important | ■ Somewhat important | ■ Neutral | ■ Important | ■ Very important |
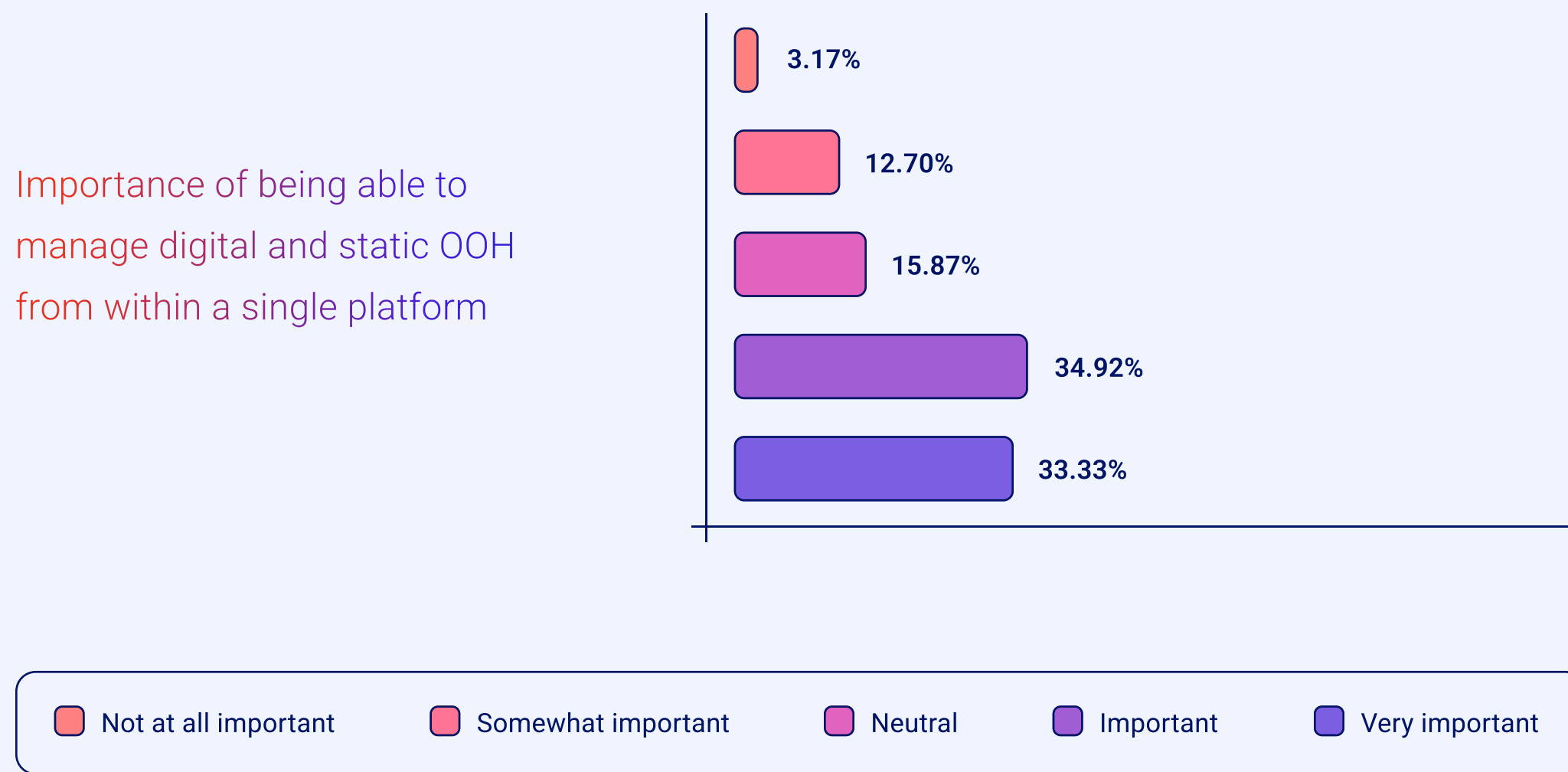
DATA-DRIVEN SOLUTIONS HOLD THE KEY TO FUTURE GROWTH

Many marketers mistakenly believe that static outdoor advertising can't be measured as a performance channel. But in 2024, nothing could be further from the truth.

No longer confined to traditional methods, today's media owners understand that harnessing data-driven solutions is the key to unlocking new revenue. In fact**, 40% of the static media owners we surveyed see data and analytics as crucial** and believe they will significantly shape the industry moving forward.

Importance of data & analytics for static OOH media owners and their perceived impact on the industry
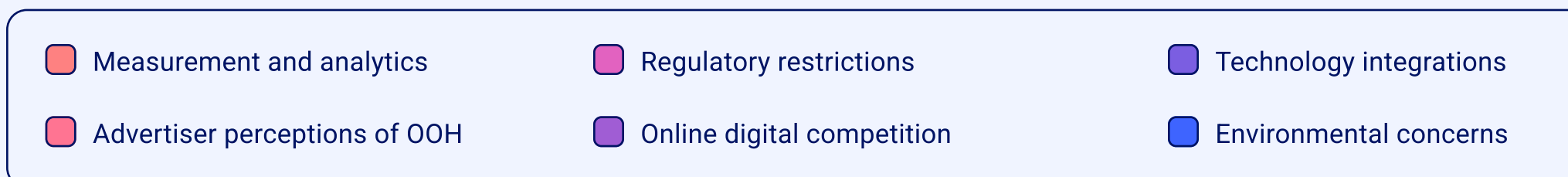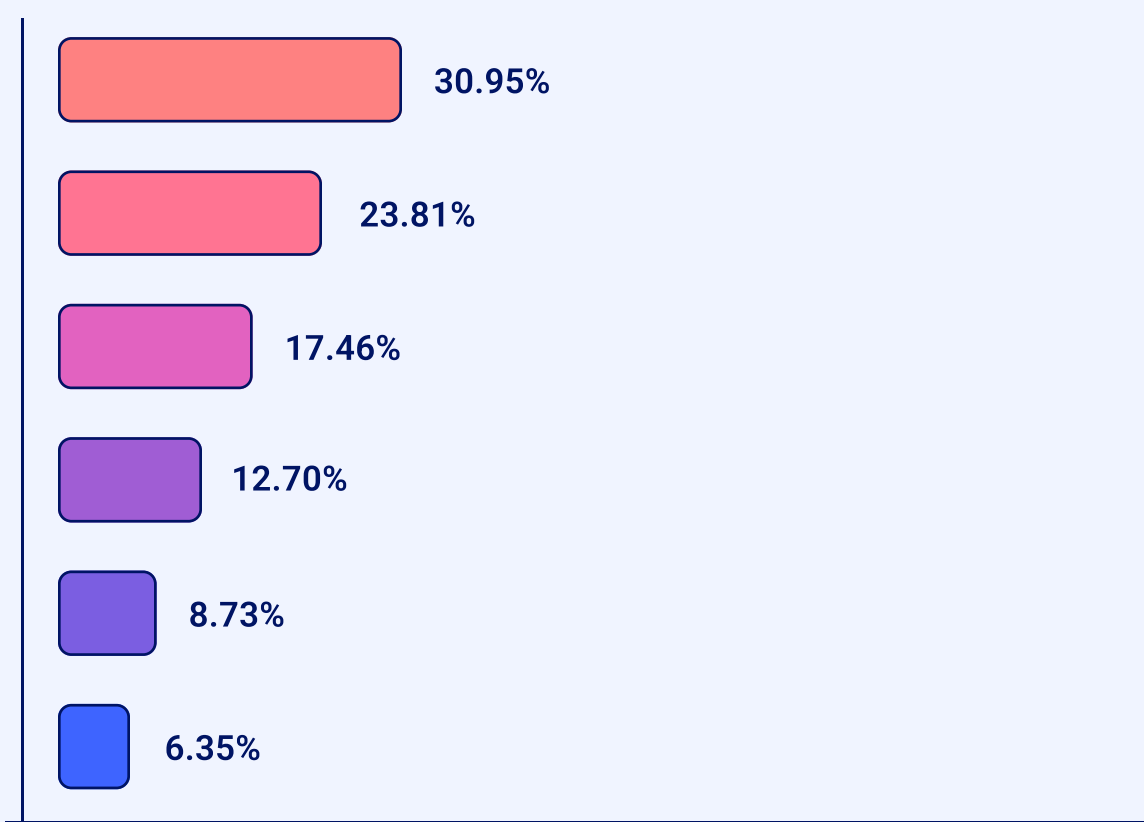
	40.48%
	26.19%
	23.81%
	8.73%
	0.79%
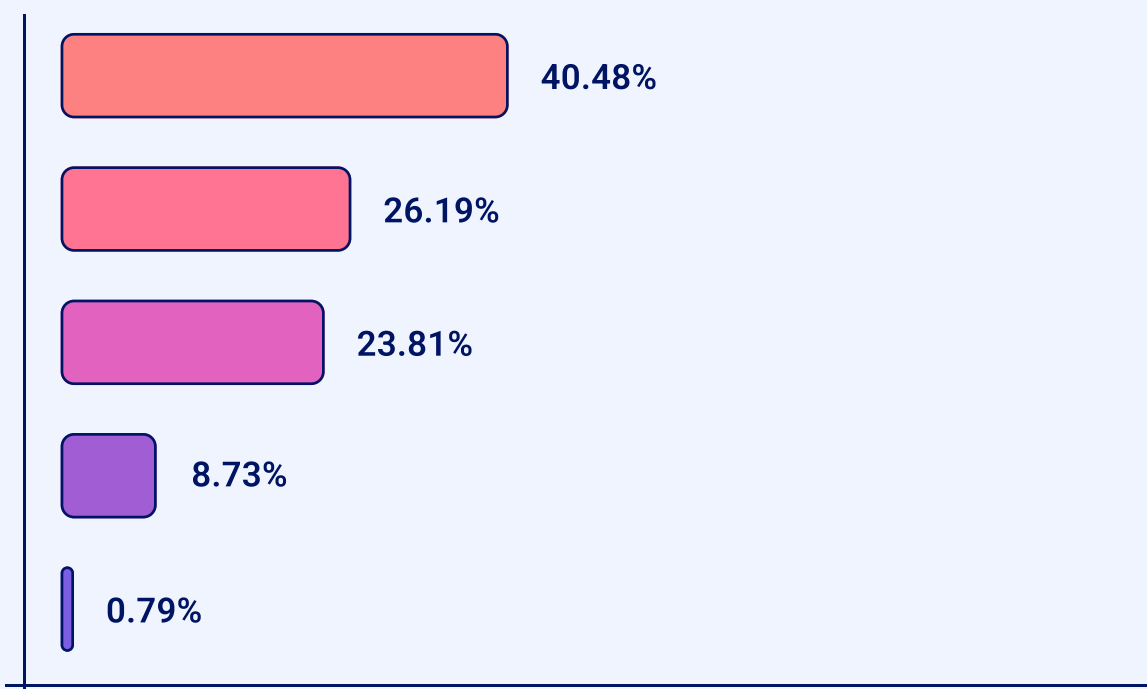
🟥 Data and analytics are crucial for static out-of-home media owners, and they will significantly shape the industry in the future.

🟪 Data and analytics are not important for static out-of-home media owners.

🟥 Data and analytics are somewhat important for static out-of-home media owners, but their impact on the industry is limited.

🟪 Other (please specify)

🟪 Data and analytics are important for static out-of-home media owners, but their impact on the industry will be minimal in the future.

40% **of the static OOH media owners that we surveyed see data and analytics as crucial**

Data-driven insights not only inform the optimization of static OOH networks but also facilitate the creation of more targeted and impactful static OOH campaigns — something that will be key to attracting more advertiser investment moving forward. This is especially crucial considering that nearly 24% of the media owners we surveyed see advertiser perceptions of OOH as their top barrier to growth over the next two years.
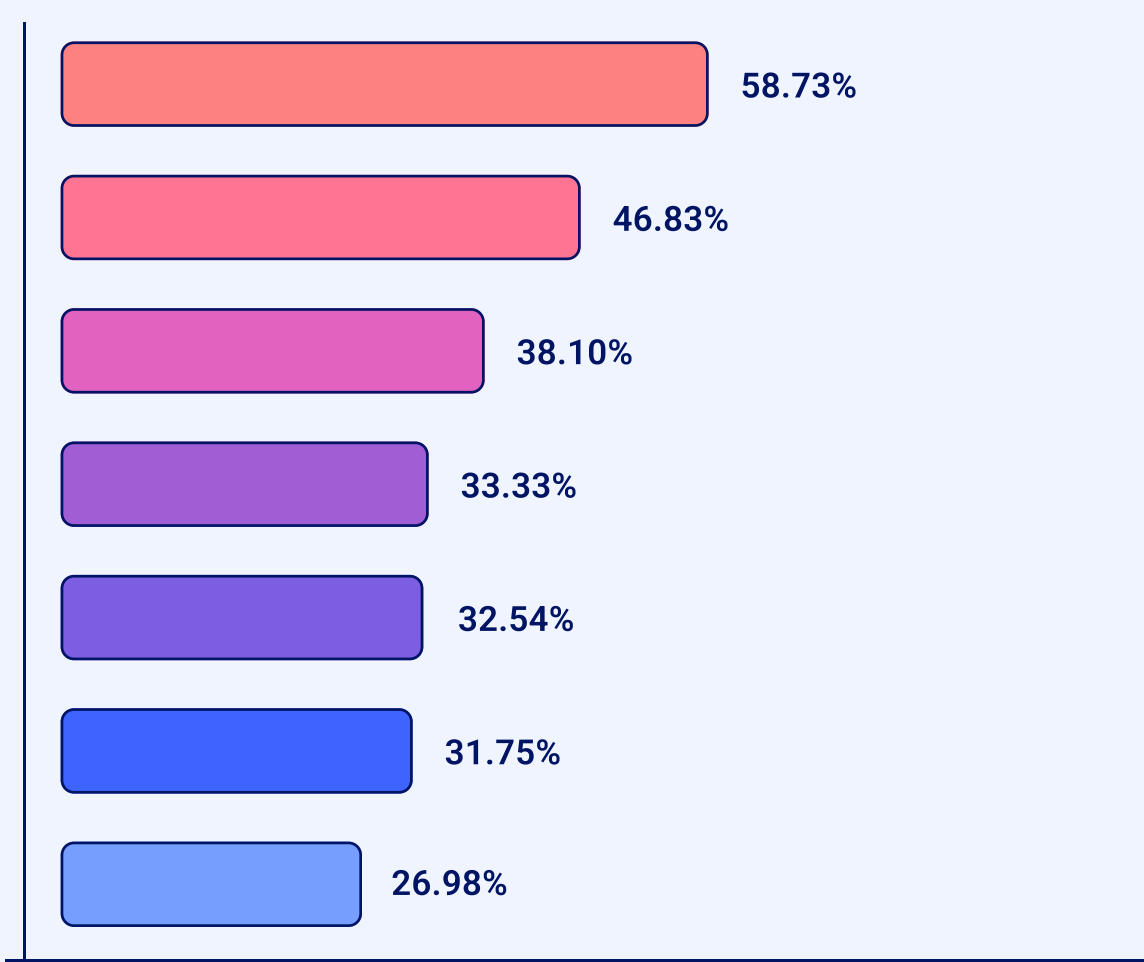
What static OOH media owners foresee as their top challenge/barrier to growth over the next two years

	30.95%
	23.81%
	17.46%
	12.70%
	8.73%
	6.35%

- 🟧 Measurement and analytics
- 🟥 Advertiser perceptions of OOH
- 🟪 Regulatory restrictions
- 🟪 Online digital competition
- 🟪 Technology integrations
- 🟦 Environmental concerns

As static media owners look to bridge the gap with still-untapped advertisers, implementing modern measurement methods becomes a necessity, ensuring their static OOH businesses thrive and remain resilient in an era where informed decision-making is the cornerstone of success.

Emerging technologies or trends that media networks believe will be most important to the growth of static OOH in the coming years

	58.73%
	46.83%
	38.10%
	33.33%
	32.54%
	31.75%
	26.98%

- 🟧 Data-driven targeting (e.g. demographics, location, consumer behaviour, etc)
- 🟥 Data measurement and attribution (e.g. improved tracking and analysis of foot traffic, engagement, brand lift)
- 🟪 Programmatic for static
- 🟪 Artificial Intelligence (e.g. data analysis, ad-placement optimization, etc)
- 🟪 Mobile integration (e.g. NFC (Near Field Communication), QR codes)
- 🟦 Sustainability & energy efficiency (e.g. eco-friendly materials, renewable energy sources, etc)
- 🟦 Digital integration (e.g. augmented reality)

Recent advancements are making many of the perceived challenges around OOH a thing of the past. By incorporating innovative technologies, static OOH media owners can:

Target, track, and measure campaign impact

Nearly a third of static outdoor advertising networks cite measurement and analytics as their organization's top barrier to short-term business growth. But many of the technological advancements seen in the DOOH space with respect to audience segmentation and analysis of consumer demographics, lifestyle, and behavior are becoming more widely available to static OOH. The main difference is that data on the DOOH side can be used to trigger relevant ad content whereas the static side leverages data to strategically select locations based on the audience and owning 100% SOV.

Drive deeper engagements and cross-channel traffic

Research has shown that out-of-home advertising initiatives can amplify efforts on other marketing channels by more than 90%[8]. By integrating augmented reality (AR), QR codes, and Near Field Communication (NFC) technology into physical static OOH placements, media owners can provide their clients with powerful tools to increase engagement and drive deeper brand interactions.

Create and activate static OOH campaigns faster

Unlike DOOH, static media transactions still rely on manual-heavy processes, with almost 40% of static OOH networks outsourcing their printing and a little over 43% still using email, chat apps, and file servers to get PoP from their billposters. Luckily, technology is also helping to simplify and streamline the turnaround for traditional OOH campaigns, with dedicated static campaign management software that offers real-time inventory availability and streamlined scheduling tools to deliver and create static campaigns faster. The availability of OOH software that's equipped to handle any kind of static campaign request, is helping media owners ensure that their static campaigns get out the door faster and their business is set for success.

A GREENER PATH FORWARD...
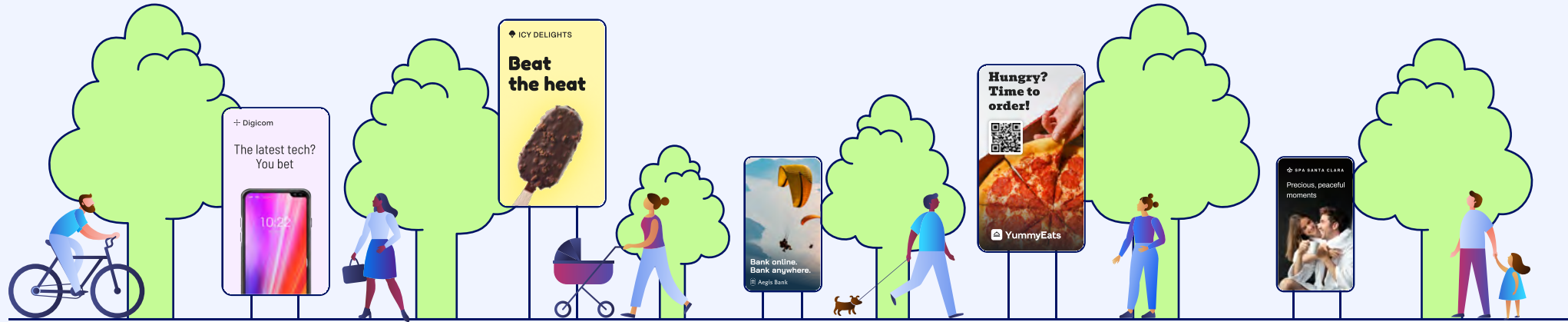
In the last few years, static out-of-home advertising has already seen significant shifts, especially in the areas of automation and cross-channel campaign integration. But what else is on the horizon for 2024 and beyond? Out-of-home media leaders from around the world weighed in on their future predictions, and the data is in: **expect a greener approach to static OOH investment on both the demand and supply sides, with decisions being driven by inventory availability, efficiency, and sustainability.**

TOP TAKEAWAYS FROM THIS CHAPTER:

⊘ **The future of static OOH is more sustainable**
Out-of-home media networks are implementing more sustainable business practices and pledging to work towards a greener, more carbon-neutral future.

⊘ **Industry perspective: Companies need to start measuring their environmental impact**
Industry insider Joe Cotugno shares insights on eco-friendly materials and practices that are helping to make static OOH more sustainable in 2024 and beyond.

THE FUTURE OF STATIC OOH IS MORE SUSTAINABLE

Sustainability isn't just the right thing to do. Today, and for the foreseeable future, it's a commercial imperative for media owners and brand marketers alike.

With the majority of outdoor advertising networks facing increasing governmental restrictions around sustainability, almost **64% of the static OOH companies that we surveyed have already pledged to reduce their carbon footprint.** An additional 17% expect to implement official sustainability measures for their business within the next few years.

Companies that have pledged
to reduce their carbon footprint

ON THE HORIZON
16.67% (21)

NO
19.84% (25)

YES
63.49% (80)
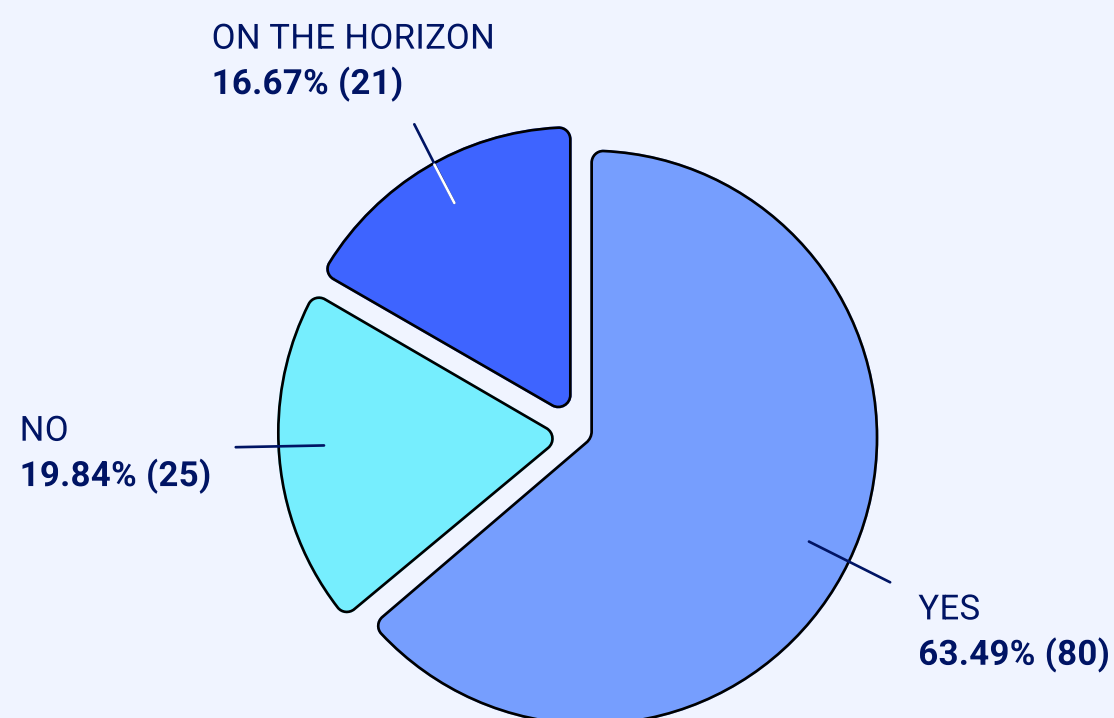
To meet the greener demands of consumers, brands are also becoming more vocal with their commitments to sustainability — including their media choices for advertising. More than 60% of survey respondents say that sustainability regularly comes up in their discussions with ad buyers; of those, roughly half say the topic comes up 'fairly often' or 'often'.

As more and more marketers recognize the value of sustainable marketing initiatives, it will be up to media owners to challenge outdated industry conceptions and champion the untapped sustainability opportunity of static OOH.

Companies are facing
increasing governmental
restrictions around
sustainability

ON THE HORIZON
16.67% (21)

NO
33.33% (42)

YES
50% (63)
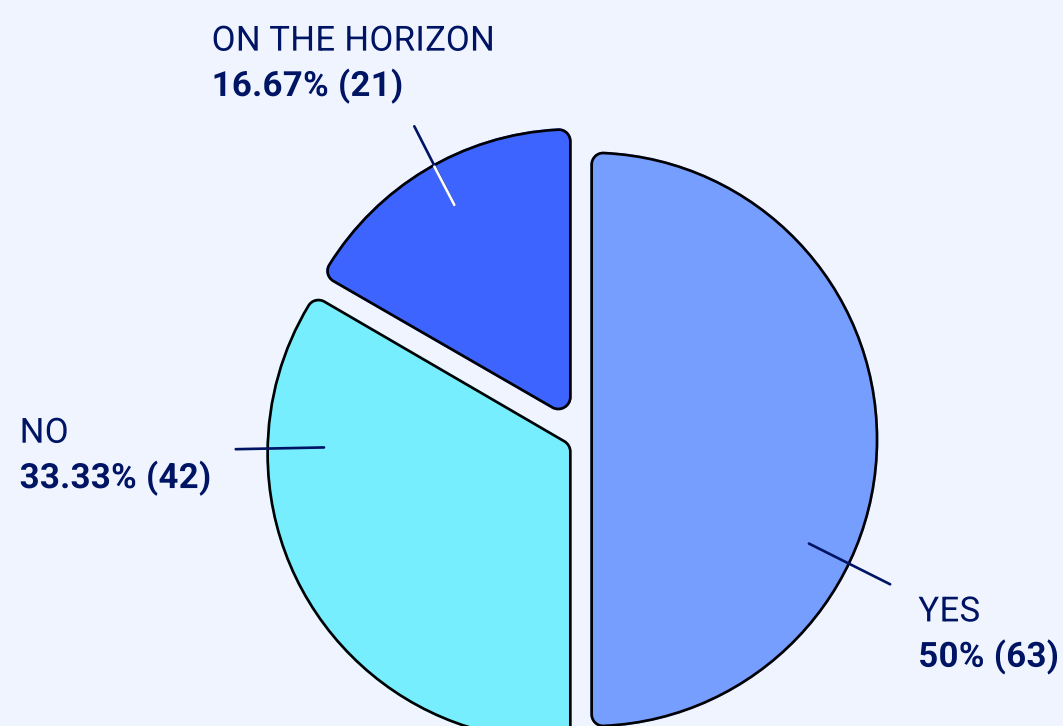
While static OOH has historically been criticized for its perceived lack of sustainability, the industry is challenging outdated stereotypes while also tackling key focus areas —like materials, energy sources, and current practices — head-on.

AMONGST THE STATIC OOH NETWORKS WE SURVEYED:

56%
typically use energy-efficient LED lighting for their signs

33%
frequently use recycled vinyl/paper for their static activations

48%
frequently re-use or donate vinyl/paper once a campaign is done

INDUSTRY PERSPECTIVE:
Media owners must start measuring their impact to meet industry sustainability goals

Joe Cotugno
Senior Vice President, International Operations at Broadsign

Over the last couple of years, a number of eco-friendly initiatives have taken root within the out-of-home industry, and specifically within static out-of-home, like converting to more efficient lighting to reduce electricity usage. On the digital side, LCD panels are being replaced with LED ones for more efficient digital screens. Similarly, LED lighting is being used to illuminate static panels instead of halogen or incandescent lights.

Adjusting signage lighting to the time of day is also helping to reduce electricity consumption by ensuring that the lighting is not on 24/7. Timers allow you to set specific times when the lighting should be on, whereas sensors turn on the lights only when they detect a lack of lighting. As solar panel technology becomes more economically viable, we'll also see more solar panels being added on top of billboards or behind them to generate the energy required for the lighting.

New practices are also being adopted in the production process, such as the development and use of "green posters" which use biodegradable poster material as opposed to vinyl or even paper. While adopting these new practices and materials are important, measuring your environmental impact is equally as important. Only once you've measured your impact can you adopt a sustainability policy that aims to reduce your environmental footprint.

As sustainability continues to be a strong influencer in our industry, advertisers may choose to work with media owners that have adopted more sustainable practices. Those who start to measure their environmental impact and evolve their practices today will gain a competitive head start to what we can only assume will be an industry standard in the future.

CLOSING

With data guiding every decision and smarter tools becoming more widely available, static out-of-home media owners and their teams are as agile as ever. OOH media leaders are rapidly expanding their efforts to improve operational inefficiencies and integrate more advanced targeting and tracking methods backed up by data. They're sharing the values that drive their companies by placing more of a focus on sustainability. And they're looking to use automation where possible to make their very full plates feel a little more manageable.

EXCEED YOUR STATIC OOH SALES GOALS THIS YEAR.

Sell campaigns faster, keep your teams in sync, and stay on top of creative requests with the only end-to-end solution built specifically for static out-of-home.

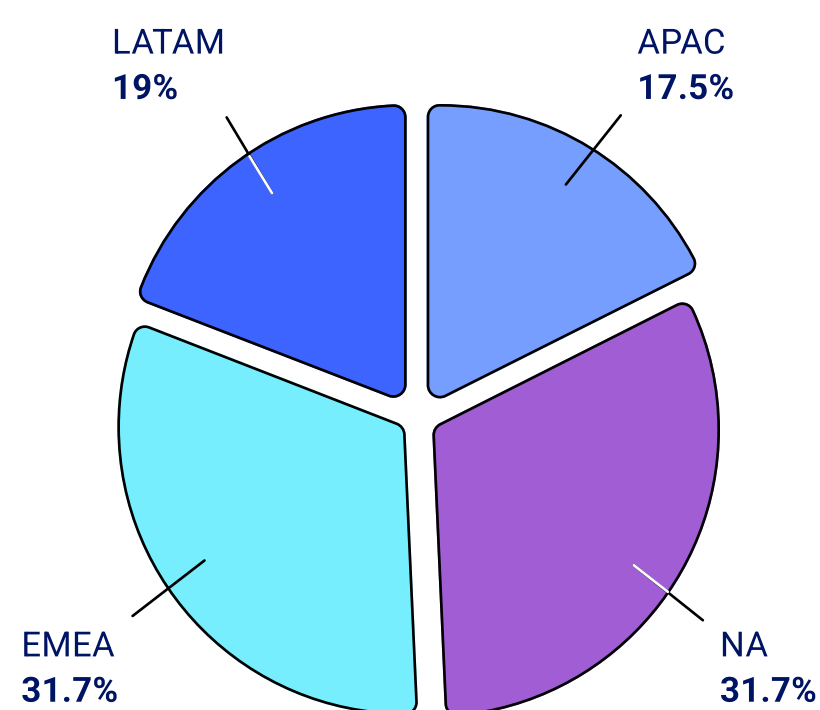**EXPLORE BROADSIGN PLANS FOR ANY SIZED BUSINESS**

Or visit https://broadsign.com/static-campaigns/

NOTES

[1] https://www.forbes.com/sites/forbestechcouncil/2021/04/27/the-power-of-static-ooh-in-the-digital-era/?sh=138f66532d22

[2] Statista, Traditional Out-of-Home Advertising - Worldwide

[3] Statista, Traditional Out-of-Home Advertising - China; Cross-comparison: Statista, Traditional Out-of-Home Advertising - Worldwide

[4] Cross-comparison: Statista, Traditional Out-of-Home Advertising - Worldwide; Statista, Traditional Out-of-Home Advertising - United States; Statista, Traditional Out-of-Home Advertising - Canada

[5] Statista, Out-of-Home Advertising - Germany, Statista, Out-of-Home Advertising - United Kingdom

[6] Cross-comparison: Statista, Out-of-Home Advertising - Caribbean; Statista, Traditional Out-of-Home Advertising - Caribbean; Statista, Out-of-Home Advertising - South America; Statista, Traditional Out-of-Home Advertising - South America; Statista, Out-of-Home Advertising - Central America; Statista, Traditional Out-of-Home Advertising - Central America; Statista, Out-of-Home Advertising - Mexico; Statista, Traditional Out-of-Home Advertising - Mexico

[7] Kantar, 2023 Media Reactions Report

[8] OAAA study, https://oaaa.org/news/new-study-finds-ooh-amplifies-all-major-media-more-than-90-percent/
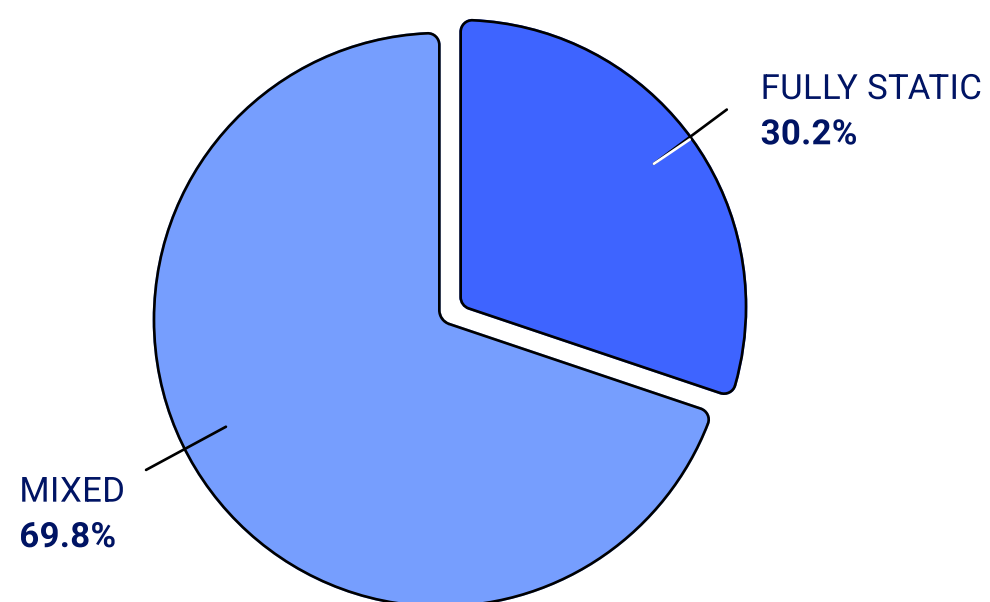
METHODOLOGY

We surveyed a total of 126 respondents from 64 global media owners with static out-of-home advertising inventory to gain these data points.
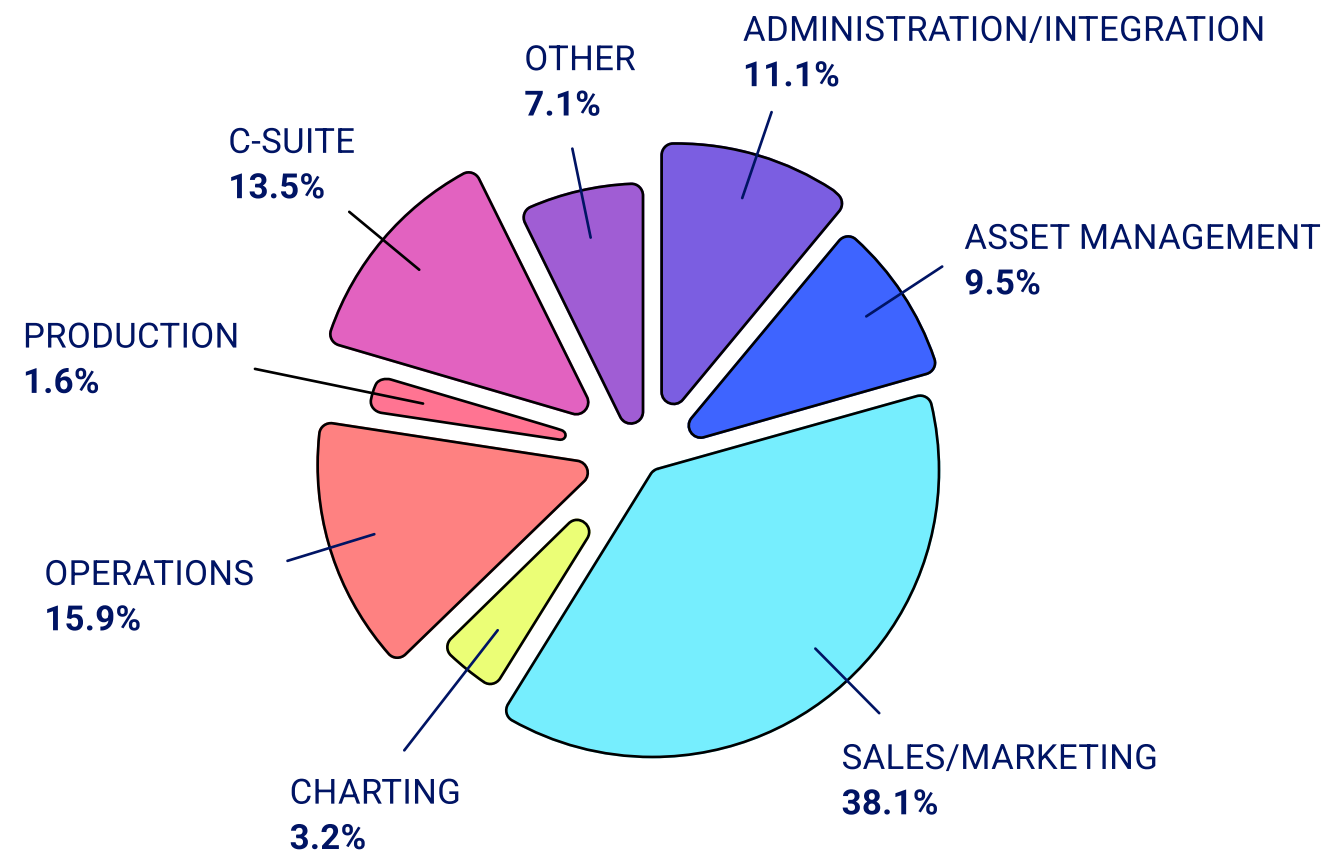
Regions represented

LATAM
19%

APAC
17.5%

EMEA
31.7%

NA
31.7%

Network types

FULLY STATIC
30.2%

MIXED
69.8%

Job functions

- OTHER **7.1%**
- ADMINISTRATION/INTEGRATION **11.1%**
- C-SUITE **13.5%**
- ASSET MANAGEMENT **9.5%**
- PRODUCTION **1.6%**
- OPERATIONS **15.9%**
- SALES/MARKETING **38.1%**
- CHARTING **3.2%**

Network sizes (by # of static faces)

- 3001+ **22.2%**
- 1-500 **27.8%**
- 1501-3000 **15.1%**
- 501-1500 **34.9%**