OOH Media Opportunities:
Consumer Insights and Intent - Early 2022

November 18, 2021
OAAA Q4 CONSUMER TRENDS FOR OOH

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Dates October 20th to 25th, 2021

Survey Length 10 minutes

Method Online

Audience 1,000 General Public, Adults 18+

Data is weighted to reflect the U.S. general public across age, gender, race/ethnicity, region, income, household size, and employment.

"Consumer Insights and Intent – Early 2022" was sponsored by The Foundation for Outdoor Advertising Research and Education (FOARE), a 501 (c) (3) not for profit, charitable organization.
**Key Takeaways**

**COVID isn’t holding back (most) future consumer travel:** three-quarters (74%) of workers are commuting right now and even more (78%) will be doing so in early 2022. Nearly half (48%) have either made their 2022 vacation plans (26%) or will do so regardless of COVID (22%); only (27%) are waiting to see what the state of COVID is before making plans. Four in 10 (42%) plan to live as normally as possible this winter, nearly double that from last winter (23%).

**OOH continues to be relevant amid the pandemic:** over 4 in 10 (42%) are noticing OOH more, and consumers noticing OOH “much more” up 9-pts from September 2020. Consumers find OOH ads about retail (63%), fast food (62%), food and beverage (60%) to be the most relevant to their interests.

**Social media amplifies OOH awareness:** over two-thirds (67%) of both Gen Z and Millennials recall seeing OOH ads reposted on social media. And social media cross-posting drives engagement: consumers say they would be likely to visit the advertisers online (55%) or their physical stores (48%).

**Most have engaged with OOH:** (57%) of consumers have engaged with an OOH ad in some way, whether it's visiting the advertiser's website (43%), searching for more information about the advertiser or their products (39%), or made a physical purchase (39%). Engagement is especially high in large urban areas, in which (77%) of consumers have engaged with an OOH ad.

**What drives engagement with OOH?** Millennials, Gen Zers, and Urbanites are most likely to stop and read OOH that featured their favorite brand or product, was something creative or artistic aligned with their values, highlighted local businesses, or featured their favorite artist or celebrity.

**Customizable OOH increases interest:** Interactive, customizable OOH ads drive greater interest, with almost half (45%) saying these types of ads are more interesting - including (65%) of major Urbanites and (58%) of Millennials.
Part 1:
The State of American Consumer Amid the Pandemic
THE HARRIS POLL: COVID-19 IN THE U.S.

Despite a Receding Pandemic, Fear Has Yet to Stabilize

54% thought national fear was irrational

Trended Fear Curves During COVID-19

66% now think national fear is sensible

Fear of new wave
Fear ventilator shortage
Fear returning to public activity
Fear global recession
Fear of dying
Feel vaccine rollout is too slow
Fear losing their job

Wave Change

49% 0
45% -2
20% -2
74% +2
73% -2
69% +1
64% +2
58% -1

54% thought national fear was irrational

66% now think national fear is sensible
THE HARRIS POLL: COVID-19 IN THE U.S.

But Optimism Is Returning

Approve of vaccine rollout

Worst is behind us

Source: Harris Poll COVID19 Tracker Wave 88 (10/29-31/2021)
BASE: GENERAL PUBLIC W88 (n=2024)

RTN02 At the moment, do you approve or disapprove of how the distribution of the COVID-19 vaccine is being handled here in the U.S.?

CFP03. Do you believe the worst of COVID-19 is behind us or is the worst still ahead of us?

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Three-Quarters of American Adults Are Vaccinated
While Over Half of Those Unvaccinated Say They Don’t Plan to Get One

Which of the following applies to you regarding the COVID-19 vaccine?

- I am fully vaccinated: 69%
- I have only received the first of two COVID-19 vaccine shots: 7%
- I am not vaccinated: 24%

Which of the following best describes your mindset to getting the COVID-19 vaccine in the future?

Among unvaccinated:

- I plan to wait awhile until I feel comfortable, 39%
- I do not plan to get the vaccine at all, 61%
- 45% Gen Z
- 41% Millennials
- 37% Gen X
- 31% Boomers

69% GOP
46% Dem

Source: Harris Poll COVID19 Tracker Wave 88 (10/29-31/2021)
BASE: GENERAL PUBLIC W88 (n=2024)
VCE1a. Which of the following applies to you regarding the COVID-19 vaccine?
BASE: UNVACCINATED W88 (n=480)
VCE1b. Which of the following best describes your mindset to getting the COVID-19 vaccine in the future?
THE HARRIS POLL: COVID-19 IN THE U.S.

Likelihood to Get COVID Booster Remains High Among Vaccinated Americans
Over One-Third of Vaccinated Gen Zers Are Unlikely to Get a Booster

How likely are you to get a booster shot once it becomes available to you?

Among vaccinated Americans

- 82% Likely
- 84% Likely
- 56%
- 61%
- 26%
- 23%
- 9%
- 10%
- 8%
- 6%
- Wave 78 August 20-22
- Wave 84 October 1-3

Source: Harris Poll COVID19 Tracker Wave 84 (10/01-10/03/21)
BASE: ALREADY VACCINATED W78 (n=1789); W84 (n=1510)
BOS02. This past week, U.S. health officials announced that booster shots are recommended 8 months after the final of the COVID vaccine. How likely are you to get a booster shot once it becomes available to you?
But Necessity Is the Biggest Deterrent for Those Not Likely to Get a Booster

Why are you not likely to get a booster shot once it becomes available to you?

*Among vaccinated who will not get booster shot*

- I don’t think a booster shot is necessary in general: 43%
- I feel like I’ve already built-up immunity to COVID from the first round of vaccination: 29%
- I had adverse side effects the first time I got the vaccine: 15%
- I only got vaccinated in the first place because it was required for work/school: 14%
- I still ended up contracting COVID even though I was vaccinated, so this isn’t going to help: 13%
- Something else: 13%

Source: Harris Poll COVID-19 Tracker Wave 84 (10/01-10/03/21)
Americans Are Still Following COVID Case News Around The Country
And Three-Quarters of Those Vaccinated Are Concerned About Breakthrough Cases

Recently, some states in the U.S., like Colorado, are experiencing rising COVID cases, hospitalizations, and deaths. How much have you read, seen, or heard about this?

- A lot: 22%
- A little bit: 41%
- Not too much: 20%
- Nothing at all: 17%

62% A Lot/A Little Bit

How concerned are you about getting a breakthrough case of COVID-19 due to the fact that other states are experiencing a rise in cases despite high vaccination rates?

Among vaccinated aware of rising cases

- Very concerned: 29%
- Somewhat concerned: 45%
- Not too concerned: 22%
- Not at all concerned: 5%

73% Concerned

Source: Harris Poll COVID19 Tracker Wave 87 (10/22-10/24/21)
BASE: GENERAL PUBLIC W87 (n=2010)

CCR1. Recently, some states in the U.S., like Colorado, are experiencing rising COVID cases, hospitalizations, and deaths. How much have you read, seen, or heard about this?

CCR2. How concerned are you about getting a breakthrough case of COVID-19 due to the fact that other states are experiencing a rise in cases despite high vaccination rates?
Over Half of Americans Say Others’ Vaccination Status Will Impact Holiday Plans

Thinking about future holiday plans, will other people’s vaccination status be a factor in deciding whether or not you will travel or attend events?

- **54%** Yes
  - Yes, definitely
  - Yes, probably

- **46%** No
  - No, probably not
  - No, definitely not

Have you canceled any existing travel or other major plans with people because they were unvaccinated?

- **58%** Among vaccinated
  - Yes, multiple events or travel plans
  - Yes, but just one
  - No

Source: Harris Poll COVID19 Tracker Wave 82 (9/17-9/19/21)
BASE: GENERAL PUBLIC W82 (n=2055)
VCW08: Thinking about future holiday plans, will other people’s vaccination status be a factor in deciding whether or not you will travel or attend events?
BASE: VACCINATED W82 (n=1454)
Have you canceled any existing travel or other major plans with people because they were unvaccinated?

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Half of Vaccinated Americans Are Hesitant to Spend Holidays with Unvaccinated

Are you hesitant to spend holidays with unvaccinated family members or friends?

Among vaccinated

<table>
<thead>
<tr>
<th>Wave 82 (9/17 - 9/19)</th>
<th>% Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, extremely</td>
<td>24%</td>
</tr>
<tr>
<td>Yes, considerably</td>
<td>26%</td>
</tr>
<tr>
<td>No, not really</td>
<td>24%</td>
</tr>
<tr>
<td>No, not at all</td>
<td>14%</td>
</tr>
<tr>
<td>N/A - all my family members/friends are vaccinated</td>
<td>12%</td>
</tr>
</tbody>
</table>

Source: Harris Poll COVID19 Tracker Wave 82 (9/17-9/19/21)
BASE: VACCINATED W82 (n=1454)
VCW10. Are you hesitant to spend holidays with unvaccinated family members or friends?
Harris Insights & Analytics LLC, A Stagwell Company © 2021
### Vaccinated Americans Are Uncomfortable Socializing with Those Unvaccinated

How comfortable would you be to attend the following events knowing that some of the attendees would be unvaccinated?

**Among vaccinated**

<table>
<thead>
<tr>
<th>Event</th>
<th>Very uncomfortable</th>
<th>Somewhat uncomfortable</th>
<th>Somewhat comfortable</th>
<th>Very comfortable</th>
<th>Comfortable NET</th>
</tr>
</thead>
<tbody>
<tr>
<td>A small party or gathering</td>
<td>23%</td>
<td>24%</td>
<td>32%</td>
<td>22%</td>
<td>53%</td>
</tr>
<tr>
<td>Holiday dinners or gatherings</td>
<td>23%</td>
<td>29%</td>
<td>29%</td>
<td>19%</td>
<td>48%</td>
</tr>
<tr>
<td>A wedding or other milestone event</td>
<td>32%</td>
<td>29%</td>
<td>22%</td>
<td>18%</td>
<td>39%</td>
</tr>
<tr>
<td>School plays or performances</td>
<td>33%</td>
<td>28%</td>
<td>22%</td>
<td>17%</td>
<td>39%</td>
</tr>
<tr>
<td>Major sale events (e.g., Black Friday sales)</td>
<td>40%</td>
<td>26%</td>
<td>20%</td>
<td>14%</td>
<td>34%</td>
</tr>
<tr>
<td>A large party or gathering</td>
<td>41%</td>
<td>26%</td>
<td>18%</td>
<td>15%</td>
<td>33%</td>
</tr>
</tbody>
</table>

Source: Harris Poll COVID19 Tracker Wave 82 (9/17-9/19/21)

**BASE:** VACCINATED AND EMPLOYED W82 (n=1454)

VCW11. How comfortable would you be to attend the following events knowing that some of the attendees would be unvaccinated?
PART 2:

Early 2022 Travel Outlook
Thinking ahead, which of the following best describes your expected work situation for each of the following timeframes?

<table>
<thead>
<tr>
<th></th>
<th>Winter 2021</th>
<th>Right now</th>
<th>First half of 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commuting every day</td>
<td>45%</td>
<td>60%</td>
<td>59%</td>
</tr>
<tr>
<td>Mix of commuting and work from home</td>
<td>26%</td>
<td>14%</td>
<td>18%</td>
</tr>
<tr>
<td>Work from home all of the time</td>
<td>28%</td>
<td>26%</td>
<td>22%</td>
</tr>
</tbody>
</table>

% Commuting Part Time or More (NET)

- **Suburban**: 72% (Right Now), 76% (First Half of 2022)
- **Rural**: 83% (Right Now), 88% (First Half of 2022)
- **Urban 1M+**: 74% (Right Now), 80% (First Half of 2022)
- **Urban <1M**: 72% (Right Now), 64% (First Half of 2022)
- **Gen Z**: 64% (Right Now), 78% (First Half of 2022)
- **Millennial**: 75% (Right Now), 81% (First Half of 2022)
- **Gen X**: 78% (Right Now), 78% (First Half of 2022)
- **Boomer+**: 71% (Right Now), 72% (First Half of 2022)
- **Male**: 75% (Right Now), 75% (First Half of 2022)
- **Female**: 72% (Right Now), 81% (First Half of 2022)
Nearly Half of Travelers Are Making 2022 Travel Plans Regardless of COVID

Generally speaking, when do you plan to finalize/book your vacation travel plans for the first half of 2022?

72% of Americans plan to travel in the first half of 2022

48%

Not for awhile, I will wait and see how COVID situation is

I've already made plans

When I know what I want to do regardless of COVID

Not sure yet

27%

26%

22%

25%

34% Urban 1M+ / <1M
27% Suburban
17% Rural

33% Boomer+
26% Gen X
21% Millennial
12% Gen Z
Airlines Will Be Making a Comeback in 2022
Those Using Airlines in 2022 Will Be More More Than Double From 2020 Holidays

Thinking ahead to your vacation travel plans for the first half of 2022, which of the following modes of transportation do you intend to take? Please select all that apply.

Among those planning to travel

Plans to Travel
- 67% 2020 Holidays
- 86% Summer 2021
- 78% First Half of 2022

<table>
<thead>
<tr>
<th>Mode of Transportation</th>
<th>2020 Holidays</th>
<th>2021 Summer</th>
<th>First Half of 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal vehicle</td>
<td>62%</td>
<td>41%</td>
<td>38%</td>
</tr>
<tr>
<td>Airplane</td>
<td>24%</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>Bus</td>
<td>11%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Train</td>
<td>11%</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>Subway/light rail</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>

84% of those planning to travel in 2020 Holidays, 56% of those planning to travel in 2021 Summer, and 51% of those planning to travel in the First Half of 2022.

Interestingly, 29% of those planning to travel in 2020 Holidays, 22% of those planning to travel in 2021 Summer, and 31% of those planning to travel in the First Half of 2022 chose to fly. The data also shows a decrease in personal car use, with only 62% of those planning to travel in 2020 Holidays, 38% in 2021 Summer, and 35% in the First Half of 2022 choosing to drive.
This Winter Will See Americans Living More Normally Than Last Year
Over 40% Plan to Live as Normally as Possible

Thinking ahead to the upcoming winter months of 2022 with colder weather amid the COVID-19 pandemic, which of the following best describes your mindset to socializing and doing activities?

- I plan to live as normally as possible (e.g., dining inside at restaurants, shopping in-person, and attending all social gatherings).
- I will try to find creative ways to socialize safely in-person (e.g., eating outside with heated patios, socially distanced gatherings indoors, plan outdoor activities like skiing, etc.)
- I will stay in my home as much as possible (e.g., leaving only for essentials, no gatherings, no in-person shopping.)

Not sure

<table>
<thead>
<tr>
<th>Category</th>
<th>Winter 2021</th>
<th>Winter 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>I plan to live as normally as possible</td>
<td>23%</td>
<td>42%</td>
</tr>
<tr>
<td>I will try to find creative ways to socialize safely in-person</td>
<td>29%</td>
<td>26%</td>
</tr>
<tr>
<td>I will stay in my home as much as possible</td>
<td>40%</td>
<td>22%</td>
</tr>
<tr>
<td>Not sure</td>
<td>8%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Q3. Thinking ahead to the upcoming winter months of 2022 with colder weather amid the COVID-19 pandemic, which of the following best describes your mindset to socializing and doing activities?
This Winter, 43% of Americans’ Local Travel Patterns Will Be Similar to or Greater than Pre-COVID

Thinking again ahead to the winter of 2022, which statement best aligns with your typical local travel patterns?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Winter 2021</th>
<th>Winter 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>My travel patterns will be similar to what they were pre-COVID.</td>
<td>27%</td>
<td>32%</td>
</tr>
<tr>
<td>My travel patterns will be decreasing in number of trips and distance in comparison to pre-COVID.</td>
<td>45%</td>
<td>30%</td>
</tr>
<tr>
<td>My travel patterns will be similar to what they were pre-COVID but more focused on trips and locations closer to my home.</td>
<td>19%</td>
<td>27%</td>
</tr>
<tr>
<td>My travel patterns will be increasing in number of trips and distance in comparison to pre-COVID.</td>
<td>9%</td>
<td>11%</td>
</tr>
</tbody>
</table>

BASE: GENERAL PUBLIC (N=1,000)
Q4. Thinking again ahead to the winter of 2022, which statement best aligns with your typical local travel patterns?
### Consumers Will Most Often Visit Grocery and Retail Stores, Restaurants, and Pharmacies in 2022

Thinking about 2022, how often do you anticipate you will visit each of the following?

<table>
<thead>
<tr>
<th>Location</th>
<th>Never</th>
<th>Once a month or less</th>
<th>Once a week</th>
<th>Several times a week</th>
<th>Everyday</th>
<th>Once a week or more (NET)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grocery store</td>
<td>3%</td>
<td>11%</td>
<td>51%</td>
<td>28%</td>
<td>7%</td>
<td>86%</td>
</tr>
<tr>
<td>Retail store</td>
<td>7%</td>
<td>36%</td>
<td>37%</td>
<td>17%</td>
<td>3%</td>
<td>57%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>11%</td>
<td>35%</td>
<td>37%</td>
<td>14%</td>
<td>4%</td>
<td>54%</td>
</tr>
<tr>
<td>Drug store / pharmacy</td>
<td>10%</td>
<td>47%</td>
<td>28%</td>
<td>12%</td>
<td>4%</td>
<td>43%</td>
</tr>
<tr>
<td>Local public parks</td>
<td>23%</td>
<td>36%</td>
<td>26%</td>
<td>11%</td>
<td>4%</td>
<td>40%</td>
</tr>
<tr>
<td>Nearby cities or towns</td>
<td>16%</td>
<td>49%</td>
<td>21%</td>
<td>12%</td>
<td>2%</td>
<td>35%</td>
</tr>
<tr>
<td>Downtown or &quot;main street&quot; shops</td>
<td>22%</td>
<td>48%</td>
<td>17%</td>
<td>8%</td>
<td>4%</td>
<td>30%</td>
</tr>
<tr>
<td>Shopping mall</td>
<td>22%</td>
<td>51%</td>
<td>16%</td>
<td>7%</td>
<td>4%</td>
<td>27%</td>
</tr>
<tr>
<td>Movie theater</td>
<td>42%</td>
<td></td>
<td>41%</td>
<td>10%</td>
<td>5%</td>
<td>16%</td>
</tr>
<tr>
<td>Arena or stadium</td>
<td>51%</td>
<td></td>
<td>34%</td>
<td>9%</td>
<td>3%</td>
<td>15%</td>
</tr>
</tbody>
</table>

**BASE:** GENERAL PUBLIC (N=1,000)

Q5. Thinking about 2022, how often do you anticipate you will visit each of the following?
## OAAA Q4 CONSUMER TRENDS FOR OOH

### Footwear, Clothing and Travel Will Be Some of Most Purchased Items in 2022

Thinking ahead to 2022, which of the following items do you plan to purchase? Please select all that apply.

<table>
<thead>
<tr>
<th>Item</th>
<th>Probability</th>
<th>Demographic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shoes or footwear</td>
<td>48%</td>
<td></td>
</tr>
<tr>
<td>Clothing to replace sweatpants and t-shirts</td>
<td>40%</td>
<td></td>
</tr>
<tr>
<td>Hotel stays</td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>Smartphones</td>
<td>28%</td>
<td>36% Men</td>
</tr>
<tr>
<td>Plane tickets</td>
<td>27%</td>
<td>36% Urban 1M+</td>
</tr>
<tr>
<td>Personal technology (e.g., laptop)</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Television</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>&quot;Going out clothes&quot;</td>
<td>22%</td>
<td>36% Gen Z</td>
</tr>
<tr>
<td>Athleisure/work out clothing</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Furniture</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Smart home technology (e.g., Alexa, Google Home, Ring)</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Jewelry (e.g., earrings, rings, watches)</td>
<td>18%</td>
<td>41% Gen Z</td>
</tr>
<tr>
<td>Car or truck</td>
<td>18%</td>
<td>27% Urban 1M+</td>
</tr>
<tr>
<td>Work attire</td>
<td>17%</td>
<td>25% Gen Z</td>
</tr>
<tr>
<td>Sporting event tickets</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Concert tickets</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>None of these</td>
<td>15%</td>
<td></td>
</tr>
</tbody>
</table>

**BASE: GENERAL PUBLIC (N=1,000)**

Q6. Thinking ahead to 2022, which of the following items do you plan to purchase? Please select all that apply.
PART 3: Out of Home Media Relevance
Those Noticing OOH Much More Is Up Significantly from September 2020

Would you say you are noticing billboards, outdoor video screens, posters, signage and other outdoor ads more now than before the pandemic began?

<table>
<thead>
<tr>
<th>Yes (Net)</th>
<th>% Yes</th>
<th>% Yes, much more</th>
<th>% Yes, slightly more</th>
<th>% No</th>
<th>% Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 2020</td>
<td>45%</td>
<td>14%</td>
<td>31%</td>
<td>46%</td>
<td>9%</td>
</tr>
<tr>
<td>January 2021</td>
<td>41%</td>
<td>19%</td>
<td>23%</td>
<td>46%</td>
<td>13%</td>
</tr>
<tr>
<td>April 2021</td>
<td>41%</td>
<td>16%</td>
<td>26%</td>
<td>48%</td>
<td>11%</td>
</tr>
<tr>
<td>October 2021</td>
<td>42%</td>
<td>23%</td>
<td>19%</td>
<td>45%</td>
<td>13%</td>
</tr>
</tbody>
</table>

+9-pts from September 2020

% Yes October 2021

- Suburban: 37%
- Rural: 32%
- Urban 1M+: 64%
- Urban <1M: 56%
- Gen Z: 72%
- Millennial: 62%
- Gen X: 39%
- Boomer+: 23%
- Male: 44%
- Female: 41%
### Among those who have noticed outdoor ads recently

<table>
<thead>
<tr>
<th>Useful Information</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Special offers and promotions</td>
<td>42%</td>
</tr>
<tr>
<td>COVID-19 safety and hygiene</td>
<td>38%</td>
</tr>
<tr>
<td>Awareness of a new business or service</td>
<td>29%</td>
</tr>
<tr>
<td>Advertiser business hours and services</td>
<td>25%</td>
</tr>
<tr>
<td>Advertiser website or social media information</td>
<td>21%</td>
</tr>
<tr>
<td>Directions to the advertiser's business</td>
<td>19%</td>
</tr>
<tr>
<td>Something else</td>
<td>13%</td>
</tr>
<tr>
<td>Nothing I saw was useful to me</td>
<td>15%</td>
</tr>
</tbody>
</table>

#### Demographics

- **42%** Female
- **33%** Male
- **33%** Urban 1M+
- **25%** Urban <1M
- **13%** Suburban
- **16%** Rural

---

**BASE: HAVE NOTICED OUTDOOR ADS RECENTLY (N=739)**

Q17. For those billboards, outdoor video screens, posters, signage, and other outdoor ads that you’ve noticed recently, what, if any, kinds did you see that were useful to you? Please select all that apply.

(Source: Harris Insights & Analytics LLC, A Stagwell Company © 2021)
### Retail, Food & Beverage OOH Ads Are Most Relevant to Americans

Medical Services, Consumer Technology and Automotive Also Rank Highly

For each of the following types of products, how relevant to your interests do you find outdoor advertisements such as billboards, outdoor video screens, posters, signage, and other outdoor ads?

<table>
<thead>
<tr>
<th>Product Category</th>
<th>Not at all relevant</th>
<th>Not too relevant</th>
<th>Somewhat relevant</th>
<th>Very relevant</th>
<th>Relevant (NET)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail (e.g. CVS, Target, Walmart)</td>
<td>13%</td>
<td>23%</td>
<td>44%</td>
<td>20%</td>
<td>63%</td>
</tr>
<tr>
<td>Fast food restaurants (e.g. McDonalds, Wendy’s)</td>
<td>13%</td>
<td>25%</td>
<td>40%</td>
<td>23%</td>
<td>62%</td>
</tr>
<tr>
<td>Food and beverages (e.g. Coke, Kraft, Budweiser)</td>
<td>15%</td>
<td>25%</td>
<td>39%</td>
<td>21%</td>
<td>60%</td>
</tr>
<tr>
<td>Medical and health services (local doctors, clinics, hospitals)</td>
<td>18%</td>
<td>26%</td>
<td>36%</td>
<td>19%</td>
<td>55%</td>
</tr>
<tr>
<td>Consumer technology (e.g. Amazon, Apple, LG)</td>
<td>18%</td>
<td>28%</td>
<td>31%</td>
<td>22%</td>
<td>54%</td>
</tr>
<tr>
<td>Cars/Trucks (e.g. Ford, Volvo, local dealers)</td>
<td>21%</td>
<td>27%</td>
<td>34%</td>
<td>18%</td>
<td>52%</td>
</tr>
<tr>
<td>Insurance (e.g. Geico, Aetna)</td>
<td>28%</td>
<td>29%</td>
<td>28%</td>
<td>14%</td>
<td>43%</td>
</tr>
<tr>
<td>Financial services (e.g. Wells Fargo, Charles Schwab)</td>
<td>26%</td>
<td>31%</td>
<td>27%</td>
<td>15%</td>
<td>43%</td>
</tr>
</tbody>
</table>
Over 60% Frequently Skip Online Ads Due to Digital Device Burnout And Two-Thirds Are Concerned About Online Data Privacy

How much do you agree or disagree with each of the following statements?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly disagree</th>
<th>Somewhat disagree</th>
<th>Somewhat agree</th>
<th>Strongly agree</th>
<th>Agree (NET)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I try to get out of the house as often as I can, even if it’s just for a drive or a walk around town.</td>
<td>9%</td>
<td>19%</td>
<td>44%</td>
<td>28%</td>
<td>72%</td>
</tr>
<tr>
<td>I frequently find myself concerned about my online personal security and data when I’m using my mobile or desktop devices.</td>
<td>10%</td>
<td>24%</td>
<td>43%</td>
<td>23%</td>
<td>66%</td>
</tr>
<tr>
<td>These days, I spend so much time looking at screens that I often tune out digital ads.</td>
<td>10%</td>
<td>28%</td>
<td>40%</td>
<td>21%</td>
<td>62%</td>
</tr>
<tr>
<td>I frequently find myself concerned about my personal security and data when shopping online.</td>
<td>10%</td>
<td>28%</td>
<td>39%</td>
<td>23%</td>
<td>62%</td>
</tr>
<tr>
<td>I try to find new places to work from home or spend time outdoors, such as an outdoor park, outdoor coffee shop, or friend’s patio.</td>
<td>21%</td>
<td>31%</td>
<td>31%</td>
<td>16%</td>
<td>47%</td>
</tr>
<tr>
<td>At this point in the pandemic, I am trying to spend less time on my phone or computer and reduce my television viewing.</td>
<td>17%</td>
<td>43%</td>
<td>25%</td>
<td>14%</td>
<td>39%</td>
</tr>
</tbody>
</table>
PART 4:

Engagement with Out of Home Media
Do you recall seeing an out of home advertisement (i.e., a billboard, outdoor video screens or posters, or other outdoor signage) reposted on a social media platform?

- Yes, often, 18%
- Yes, but only a few times, ...
- Not sure, 13%
- No, 47%
- 40% Yes (NET)

% Yes (NET)

- Suburban: 34%
- Rural: 29%
- Urban 1M+: 67%
- Urban <1M: 50%
- Gen Z: 67%
- Millennial: 67%
- Gen X: 37%
- Boomer+: 16%
- Male: 46%
- Female: 34%
### Seeing OOH Ads of Interest Most Likely to Boost Online or Retail Foot Traffic for Advertisers

After seeing an out of home advertisement such as billboards, outdoor video screens, posters, and other signage that you really liked or found to be interesting, how likely would you be to do the following?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Not at all likely</th>
<th>Not too likely</th>
<th>Somewhat likely</th>
<th>Very likely</th>
<th>Likely (NET)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit the advertiser’s online store</td>
<td>23%</td>
<td>22%</td>
<td>39%</td>
<td>16%</td>
<td>55%</td>
</tr>
<tr>
<td>Visit the advertiser’s physical store</td>
<td>21%</td>
<td>30%</td>
<td>34%</td>
<td>14%</td>
<td>48%</td>
</tr>
<tr>
<td>Follow the advertiser on social media</td>
<td>35%</td>
<td>28%</td>
<td>25%</td>
<td>12%</td>
<td>37%</td>
</tr>
<tr>
<td>Take a picture to share with a friend</td>
<td>38%</td>
<td>26%</td>
<td>22%</td>
<td>14%</td>
<td>35%</td>
</tr>
<tr>
<td>Take a picture to share on social media</td>
<td>43%</td>
<td>28%</td>
<td>17%</td>
<td>13%</td>
<td>30%</td>
</tr>
</tbody>
</table>

**BASE: GENERAL PUBLIC (N=1,000)**

Q11. After seeing an out of home advertisement such as billboards, outdoor video screens, posters, and other signage that you really liked or found to be interesting, how likely would you be to do the following?
Over 60% Would Repost OOH on Social, Including Over 80% of Younger Generations

Which type of out of home advertisement are you most likely to reshare on your social media?

Among those who would reshare

- Television show or movie: 16%
- Bar or restaurant: 13%
- New food or beverage product: 12%
- Clothing and/or shoes: 11%
- New album or song from your favorite musical artist: 11%
- Car or truck: 8%
- Sporting events: 8%
- Local retail store: 7%
- Concert, theatre or comedy show: 6%
- Political or social advocacy message: 6%

61% would reshare OOH on social media

Suburban: 57%
Rural: 52%
Urban 1M+: 78%
Urban <1M: 69%
Gen Z: 91%
Millennial: 82%
Gen X: 56%
Boomer+: 42%

26% Urban 1M+
11% Urban <1M
14% Suburban
11% Rural

15% Women
7% Men

17% Gen Z
21% Gen X

Q12. Which type of out of home advertisement are you most likely to reshare on your social media?

BASE: WOULD REPOST OOH ON SOCIAL MEDIA (N=588)

Harris Insights & Analytics LLC, A Stagwell Company © 2021
Three-Fifths Have Engaged with OOH Ads
Engagement Most Likely Has Led to Visiting Advertiser’s Website, Searching for Info, or Making a Purchase

For those billboards, outdoor video screens, posters, signage, and other outdoor ads that you’ve noticed recently, have the ads led you to do any of the following? Please select all that apply.

Among those who have engaged

- Visited the advertiser’s website: 43%
  - 56% Boomer+

- Searched for more information about the advertiser or their products: 39%

- Made a physical purchase: 39%
  - 50% Urban 1M+

- Downloaded an app: 28%
  - 46% Gen Z
  - 38% Millennial

- Took a photo of the ad: 22%

- Shared by word-of-mouth information about the advertiser or product with family or friends: 20%
  - 26% Gen X

- Made a social media post: 17%
  - 32% Gen Z

- Engaged with the ad via a QR code, tap/NFC, or text: 16%
  - 26% Gen Z
  - 29% Millennial
  - 36% Urban 1M+

- Made an ecommerce purchase: 16%
  - 27% Millennial

57% have engaged with an OOH ad
## OOH Engagement Is Driven by Brand Loyalty, Creativity, Locality, Influencers

How likely would you be to stop and read or engage with the following kinds of outdoor advertising if the billboards, outdoor video screens, posters, and other signage was to show each of the following?

<table>
<thead>
<tr>
<th>Feature</th>
<th>Not at all likely</th>
<th>Not too likely</th>
<th>Somewhat likely</th>
<th>Very likely</th>
<th>Likely (NET)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Featured my favorite brand or product</td>
<td>17%</td>
<td>21%</td>
<td>41%</td>
<td>21%</td>
<td>62%</td>
</tr>
<tr>
<td>Something creative or artistic that had a message aligned with my values, even if I didn’t realize it was an advertisement</td>
<td>21%</td>
<td>26%</td>
<td>36%</td>
<td>17%</td>
<td>54%</td>
</tr>
<tr>
<td>Highlighted local business, artists, or events</td>
<td>19%</td>
<td>29%</td>
<td>35%</td>
<td>17%</td>
<td>52%</td>
</tr>
<tr>
<td>Featured my favorite artist, celebrity, or influencer</td>
<td>23%</td>
<td>26%</td>
<td>36%</td>
<td>15%</td>
<td>51%</td>
</tr>
<tr>
<td>Highlighted a social cause</td>
<td>25%</td>
<td>27%</td>
<td>33%</td>
<td>16%</td>
<td>48%</td>
</tr>
<tr>
<td>Gave me exclusive access to new a product from my favorite brand (e.g., via QR code, SMS text message)</td>
<td>24%</td>
<td>28%</td>
<td>32%</td>
<td>16%</td>
<td>48%</td>
</tr>
</tbody>
</table>

**BASE: GENERAL PUBLIC (N=1,000)**

Q14. How likely would you be to stop and read or engage with the following kinds of outdoor advertising if the billboards, outdoor video screens, posters, and other signage was to show each of the following?

- Millennial
- Urban 1M+
- Gen Z
Which of the following creative aspects of billboards, outdoor video screens, posters, and other signage would you say are most likely to get your attention and engage with? Please select up to 3.

- Colorful and vibrant: 45%
- Portrays something clever or funny: 38%
- Simple design, few words easy to read: 36%
- Big and bold (e.g., a larger than life mural on a tall building, bus or mobile billboard): 32%
- Evokes an emotional feeling / has a serious tone: 19%
- Abstract and creative illustration with no words: 17%
- None of these: 18%

Female: 49%
Male: 40%
Gen Z: 23%
Millennial: 41%
Gen X: 38%
Boomer+: 39%

Urban 1M+: 46%
Urban <1M: 33%
Suburban: 27%
Rural: 28%

Gen Z: 36%
Millennial: 29%
Gen X: 8%
Boomer+: 10%
Nearly Half Say Contextual OOH Ads Are More Interesting

Some billboards, outdoor video screens, posters, signage, and other outdoor ads are personalized to include timely information e.g., breakfast offerings in the morning, products relevant to current weather, etc. Do you find this type of advertising more or less interesting than a typical ad?

- Yes, I find these types of ads of greater interest, 45%
- This type of ad doesn't have any impact on my interest, 29%
- I am not interested in these types of ads, 26%

% Greater Interest

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suburban</td>
<td>39%</td>
</tr>
<tr>
<td>Rural</td>
<td>36%</td>
</tr>
<tr>
<td>Urban 1M+</td>
<td>65%</td>
</tr>
<tr>
<td>Urban &lt;1M</td>
<td>58%</td>
</tr>
<tr>
<td>Gen Z</td>
<td>50%</td>
</tr>
<tr>
<td>Millennial</td>
<td>58%</td>
</tr>
<tr>
<td>Gen X</td>
<td>43%</td>
</tr>
<tr>
<td>Boomer+</td>
<td>35%</td>
</tr>
<tr>
<td>Male</td>
<td>50%</td>
</tr>
<tr>
<td>Female</td>
<td>40%</td>
</tr>
</tbody>
</table>

OAAA Q4 CONSUMER TRENDS FOR OOH

Nearly Half Say Contextual OOH Ads Are More Interesting

Some billboards, outdoor video screens, posters, signage, and other outdoor ads are personalized to include timely information e.g., breakfast offerings in the morning, products relevant to current weather, etc. Do you find this type of advertising more or less interesting than a typical ad?

- Yes, I find these types of ads of greater interest, 45%
- This type of ad doesn't have any impact on my interest, 29%
- I am not interested in these types of ads, 26%

% Greater Interest

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suburban</td>
<td>39%</td>
</tr>
<tr>
<td>Rural</td>
<td>36%</td>
</tr>
<tr>
<td>Urban 1M+</td>
<td>65%</td>
</tr>
<tr>
<td>Urban &lt;1M</td>
<td>58%</td>
</tr>
<tr>
<td>Gen Z</td>
<td>50%</td>
</tr>
<tr>
<td>Millennial</td>
<td>58%</td>
</tr>
<tr>
<td>Gen X</td>
<td>43%</td>
</tr>
<tr>
<td>Boomer+</td>
<td>35%</td>
</tr>
<tr>
<td>Male</td>
<td>50%</td>
</tr>
<tr>
<td>Female</td>
<td>40%</td>
</tr>
</tbody>
</table>
### OAAA Q4 CONSUMER TRENDS FOR OOH

**Weather/Traffic, Food, Entertainment and Special Offers Considered as Most Helpful OOH Ads**

Which of the following types of these changing, customized outdoor advertisements would you find to be most helpful?

<table>
<thead>
<tr>
<th>Advertisement Type</th>
<th>Percentage</th>
<th>Subgroup Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local updates on weather and traffic conditions</td>
<td>36%</td>
<td>42% Women, 29% Men</td>
</tr>
<tr>
<td>Food options at nearby restaurants for the current time of day</td>
<td>34%</td>
<td>44% Urban 1M+, 15% Urban &lt;1M</td>
</tr>
<tr>
<td>Upcoming movies or TV/entertainment shows and where to watch in-person or on screen</td>
<td>31%</td>
<td>31% Suburban, 29% Rural</td>
</tr>
<tr>
<td>Limited time special offers or discounts</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>Upcoming concert, theatre, or comedy shows at nearby venues</td>
<td>20%</td>
<td>24% Gen Z, 30% Urban &lt;1M</td>
</tr>
<tr>
<td>Upcoming sporting events and where to watch in-person or on screen</td>
<td>18%</td>
<td>27% Millennial, 14% Gen X, 14% Boomer+</td>
</tr>
<tr>
<td>Clothes available at nearby stores for seasonal or current weather conditions</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>None of these</td>
<td>19%</td>
<td></td>
</tr>
</tbody>
</table>

**BASE:** GENERAL PUBLIC (N=1,000)

Q19. Which of the following types of these changing, customized outdoor advertisements would you find to be most helpful?
PART 5:
The Connected Consumer and Data Privacy
How interested are you in virtual reality (VR) and/or augmented reality (AR)?

<table>
<thead>
<tr>
<th>Interest Level</th>
<th>Suburban</th>
<th>Rural</th>
<th>Urban 1M+</th>
<th>Urban &lt;1M</th>
<th>Gen Z</th>
<th>Millennial</th>
<th>Gen X</th>
<th>Boomer+</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very interested</td>
<td>26%</td>
<td>29%</td>
<td>63%</td>
<td>29%</td>
<td>38%</td>
<td>62%</td>
<td>33%</td>
<td>16%</td>
<td>42%</td>
<td>25%</td>
</tr>
<tr>
<td>Somewhat interested</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not too interested</td>
<td>15%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not at all interested</td>
<td>26%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

BASE: GENERAL PUBLIC (N=1,000)
Q20. How interested are you in virtual reality (VR) and/or augmented reality?
Younger Generations Are Open to Seeing Ads in VR/AR Experiences

Would you be open to seeing the following during virtual reality (VR) and/or augmented reality (AR) gaming experiences?

<table>
<thead>
<tr>
<th>Category</th>
<th>General Public</th>
<th>Gen Z</th>
<th>Millennial</th>
<th>Gen X</th>
<th>Boomer+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ads for sales and promotions for real world products</td>
<td>32%</td>
<td>27%</td>
<td>25%</td>
<td>21%</td>
<td>12%</td>
</tr>
<tr>
<td>Virtual billboards and other virtual signage that advertises real world brands</td>
<td>35%</td>
<td>22%</td>
<td>21%</td>
<td>19%</td>
<td>12%</td>
</tr>
<tr>
<td>Ads for other gaming and entertainment experiences</td>
<td>43%</td>
<td>37%</td>
<td>36%</td>
<td>34%</td>
<td>37%</td>
</tr>
<tr>
<td>Something else</td>
<td>44%</td>
<td>44%</td>
<td>44%</td>
<td>44%</td>
<td>44%</td>
</tr>
<tr>
<td>I am not open to seeing ads in virtual or augmented reality gaming experiences</td>
<td>47%</td>
<td>49%</td>
<td>49%</td>
<td>49%</td>
<td>49%</td>
</tr>
</tbody>
</table>

Q21. Would you be open to seeing the following during virtual reality (VR) and/or augmented reality gaming experiences?

BASE: GENERAL PUBLIC (N=1,000)

50% Urban 1M+
44% Urban 1M+
36% Urban 1M+
Generally speaking, how concerned would you say you are about privacy and the use of your personal information and online behavior to target you with online ads?

74% Concerned (NET)

- Suburban: 74%
- Rural: 68%
- Urban 1M+: 81%
- Urban <1M: 76%
- Gen Z: 72%
- Millennial: 77%
- Gen X: 75%
- Boomer+: 73%
- Male: 74%
- Female: 75%

Concern Over Privacy and Use of Personal Info Online Is High
The outlook for consumer travel is strong, increasing OOH’s relevance over the next year as the COVID pandemic will (hopefully) continue to recede and normal travel continue to return. Over half (51%) of those traveling in the first half of 2022 will do so by airplane, more than double that from last winter.

Social media is an effective amplifier of OOH campaigns, especially for younger generations: two-thirds (67%) of Gen Z and Millennials recall OOH ads reposted on social media. And that most consumers (57%) have engaged with an OOH reinforces that when OOH ads are of interest, relevant, and targeted, consumers are very open to engaging and sharing.

VR/AR creates a new opportunity for OOH - among younger consumers. A large majority (82%) of both Gen Z and Millennials are open to seeing some type of ad in VR/AR. Among adults in cities with populations of one million or more, 72% say they are interested in seeing ads in VR/AR.
“Consumer Insights and Intent: Early 2022” was sponsored by The Foundation for Outdoor Advertising Research and Education (FOARE), a 501 (c) (3) not for profit, charitable organization.