Consumer Insights and Intent - Q1
OOH Opportunities

February 10, 2021
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## Key Takeaways

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<td>p.20</td>
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</tbody>
</table>

## Dates

<table>
<thead>
<tr>
<th>Dates</th>
<th>January 15th to 20th, 2021</th>
</tr>
</thead>
</table>

## Survey Length

<table>
<thead>
<tr>
<th>Survey Length</th>
<th>11 minutes</th>
</tr>
</thead>
</table>

## Method

<table>
<thead>
<tr>
<th>Method</th>
<th>Online</th>
</tr>
</thead>
</table>

## Audience

<table>
<thead>
<tr>
<th>Audience</th>
<th>General Public (n=1,000)</th>
</tr>
</thead>
</table>

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

The Future Commute: Looking ahead to the next few months, over 70% of workers will be commuting at least part-time, over 4 in 10 workers (45%) will be commuting everyday, while the other half will either be working from home (28%) or a mix of commuting and WFH (26%). There is an income gap in everyday commuters: 57% of households with income <$50k will be commuting vs only 34% of households with income over $150k. However, 66% of the $150K households will commute at least part-time.

Today, highways and routes to grocery and retail stores are most optimal for OOH to meet consumers; 86% are visiting the grocery store and 70% driving on the highway once a week or more, which is 30 percentage points higher than most other activities, and half (50%) are visiting retail stores. In fact, consumers are noticing OOH the most while driving right now (83%).

Even during the winter months when people are indoors more, OOH is gaining traction, especially with younger consumers: Since September, there has been a 5 point increase in those who say they notice OOH “much more.” Additionally, 60% of Gen Z, 58% of millennials, and 42% of Gen X say they are noticing OOH more.

OOH is leading consumers to discover new businesses and brands, and influencing their path to purchase: About one-quarter report OOH informed them of a new business or brand this past year. In larger urban areas 1M+, 34% say OOH influenced their decision to buy a product.

Consumers are relying on OOH to stay informed on public safety and COVID: 7 in 10 (70%) say OOH public safety messaging makes them feel informed and safe and 29% say they’ve learned new public health information about COVID-19 from OOH.

Consumers are embracing new contactless commerce technology, such as tap to pay (45%) and QR codes (41%). At the same time, digital device burn out is rising (+7 pts increase since September), and many consumers are increasingly seeking outdoor activities, especially Gen Z, 82% of whom say they wish there were more outdoor dining offerings, and Millennials, 78% of whom say they are trying to find safe outdoor activities to spend their time.
PART 1: MEETING CONSUMERS WHERE THEY ARE

Q1 Mobility & The Opportunity for Out of Home
Looking Ahead to the Next Few Months, Nearly Three-Quarters of Workers Will Be Commuting at Least Part Time

Looking ahead to these next few months during the COVID-19 pandemic, which of the following best describes your work situation?

- 45% I will be commuting to my job every day
- 26% I will be doing a mix of commuting and working from home
- 28% I will be working from home all of the time

72% Commuting at least part time
Over 4 in 10 Workers Will Be Commuting Everyday, With Notable Variances by Income and Geographic Region

Looking ahead to these next few months during the COVID-19 pandemic, which of the following best describes your work situation?

<table>
<thead>
<tr>
<th>Work Situation</th>
<th>% Commuting Everyday</th>
</tr>
</thead>
<tbody>
<tr>
<td>I will be commuting to my job every day</td>
<td>57%</td>
</tr>
<tr>
<td>I will be doing a mix of commuting and working from home</td>
<td>48%</td>
</tr>
<tr>
<td>I will be working from home all of the time</td>
<td>41%</td>
</tr>
</tbody>
</table>

**% Commuting Everyday**

- < $50k: 57%
- $50-99k: 48%
- $100-$150k: 41%
- $150k+: 34%
- Gen Z: 44%
- Millennial: 44%
- Gen X: 46%
- Boomer+: 48%
- West: 36%
- Mountain/Great Plains: 48%
- Midwest: 49%
- Northeast: 36%
- South: 44%
- Mid-Atlantic: 61%

**BASE: EMPLOYED (546)**

**Q1. Looking ahead to these next few months during the COVID-19 pandemic, which of the following best describes your work situation?**
And Over a Quarter Will Be Taking a Mixed Approach, Especially Those in the West, Northeast and South

Looking ahead to these next few months during the COVID-19 pandemic, which of the following best describes your work situation?

- 45% I will be commuting to my job every day
- 26% I will be doing a mix of commuting and working from home
- 28% I will be working from home all of the time

% Doing a Mix of Community / Working From Home

- < $50k: 19%
- $50-99k: 24%
- $100-$150k: 30%
- $150k+: 32%
- Gen Z: 31%
- Millennial: 28%
- Gen X: 25%
- Boomer+: 25%
- West: 36%
- Mountain/Great Plains: 19%
- Midwest: 19%
- Northeast: 33%
- South: 32%
- Mid-Atlantic: 12%

BASE: EMPLOYED (546)
Q1. Looking ahead to these next few months during the COVID-19 pandemic, which of the following best describes your work situation?
OAAA Q1 CONSUMER TRENDS FOR OOH

While Only About A One-Quarter Will Be Working-From-Home Entirely

Looking ahead to these next few months during the COVID-19 pandemic, which of the following best describes your work situation?

- I will be commuting to my job every day: 45%
- I will be doing a mix of commuting and working from home: 26%
- I will be working from home all of the time: 28%

72% Commuting at least part time

% Working From Home All the Time

- < $50k: 24%
- $50-99k: 28%
- $100-$150k: 28%
- $150k+: 34%
- Gen Z: 26%
- Millennial: 27%
- Gen X: 29%
- Boomer+: 27%
- West: 28%
- Mountain/Great Plains: 33%
- Midwest: 32%
- Northeast: 31%
- South: 24%
- Mid-Atlantic: 27%

Q1: Looking ahead to these next few months during the COVID-19 pandemic, which of the following best describes your work situation?
Vast Majority Will Be Commuting By Car After The Pandemic, but More Workers Will Be Working From Home Post-Pandemic Than Before

What would you say is your primary method of commuting to your job at each of the following time periods?

- Before the pandemic
- At the moment
- After the pandemic

<table>
<thead>
<tr>
<th>Method</th>
<th>Before the pandemic</th>
<th>At the moment</th>
<th>After the pandemic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking</td>
<td>23%</td>
<td>18%</td>
<td>19%</td>
</tr>
<tr>
<td>Bike or scooter</td>
<td>18%</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>Car</td>
<td>20%</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>Bus</td>
<td>20%</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>Subway or light rail</td>
<td>16%</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>Working from home</td>
<td>16%</td>
<td>14%</td>
<td>28%</td>
</tr>
</tbody>
</table>

+12 pts from pre-covid
What would you say is your primary method of commuting to your job at each of the following time periods?

<table>
<thead>
<tr>
<th>Method</th>
<th>Before the pandemic</th>
<th>At the moment</th>
<th>After the pandemic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking</td>
<td>20%</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>Bike or scooter</td>
<td>55%</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>Car</td>
<td>61%</td>
<td>21%</td>
<td>16%</td>
</tr>
<tr>
<td>Bus</td>
<td>22%</td>
<td>22%</td>
<td>14%</td>
</tr>
<tr>
<td>Subway or light rail</td>
<td>33%</td>
<td>21%</td>
<td>10%</td>
</tr>
<tr>
<td>Working from home</td>
<td>45%</td>
<td>33%</td>
<td>15%</td>
</tr>
</tbody>
</table>

**Urban 1M+**

**Urban <1M**

Q2. What would you say is your primary method of commuting to your job at each of the following time periods? Please select all that apply.
Today, Highways and Routes to Grocery and Retail Stores Are Most Optimal for OOH to Meet Consumers

Thinking about your typical routine, how often do you visit or go to 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</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grocery store</td>
<td>3%</td>
<td>11%</td>
<td>49%</td>
<td>31%</td>
<td>6%</td>
<td>86%</td>
</tr>
<tr>
<td>Driving on the highway</td>
<td>10%</td>
<td>20%</td>
<td>26%</td>
<td>26%</td>
<td>18%</td>
<td>70%</td>
</tr>
<tr>
<td>Retail stores</td>
<td>9%</td>
<td>41%</td>
<td>27%</td>
<td>18%</td>
<td>5%</td>
<td>50%</td>
</tr>
<tr>
<td>Visit with friends or family</td>
<td>13%</td>
<td>37%</td>
<td>26%</td>
<td>16%</td>
<td>8%</td>
<td>50%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>19%</td>
<td>35%</td>
<td>26%</td>
<td>16%</td>
<td>4%</td>
<td>46%</td>
</tr>
<tr>
<td>Nearby cities or towns</td>
<td>18%</td>
<td>40%</td>
<td>21%</td>
<td>13%</td>
<td>8%</td>
<td>42%</td>
</tr>
<tr>
<td>Drug store / pharmacy</td>
<td>11%</td>
<td>47%</td>
<td>28%</td>
<td>13%</td>
<td>8%</td>
<td>42%</td>
</tr>
<tr>
<td>Local public parks</td>
<td>31%</td>
<td>35%</td>
<td>16%</td>
<td>10%</td>
<td>8%</td>
<td>34%</td>
</tr>
<tr>
<td>Downtown or &quot;main street&quot; shops</td>
<td>35%</td>
<td>33%</td>
<td>17%</td>
<td>9%</td>
<td>5%</td>
<td>31%</td>
</tr>
<tr>
<td>Liquor stores</td>
<td>45%</td>
<td>28%</td>
<td>15%</td>
<td>7%</td>
<td>5%</td>
<td>28%</td>
</tr>
</tbody>
</table>

BASE: GENERAL PUBLIC (1000)
Q3. Thinking about your typical routine, how often do you visit or go to each of the following?

58% Millennial
49% Millennial
52% Urban 1M+
39% HHI $150k+
### In Fact, Consumers Are Noticing OOH the Most While Driving Right Now

How often would you say you notice billboards, outdoor video screens, posters, signage, and other outdoor ads while doing each of the following?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Never</th>
<th>Sometimes</th>
<th>Often</th>
<th>Always</th>
<th>Notice at least sometimes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Driving on the highway</td>
<td>17%</td>
<td>50%</td>
<td>23%</td>
<td>10%</td>
<td>83%</td>
</tr>
<tr>
<td>Driving around your town or city</td>
<td>18%</td>
<td>51%</td>
<td>23%</td>
<td>8%</td>
<td>82%</td>
</tr>
<tr>
<td>Visiting a city or town in which you do not live</td>
<td>29%</td>
<td>45%</td>
<td>19%</td>
<td>7%</td>
<td>71%</td>
</tr>
<tr>
<td>Walking around your local downtown or &quot;main street&quot; area</td>
<td>37%</td>
<td>40%</td>
<td>17%</td>
<td>6%</td>
<td>63%</td>
</tr>
<tr>
<td>At the airport</td>
<td>49%</td>
<td>33%</td>
<td>12%</td>
<td>6%</td>
<td>51%</td>
</tr>
<tr>
<td>While using public transportation</td>
<td>54%</td>
<td>26%</td>
<td>14%</td>
<td>6%</td>
<td>46%</td>
</tr>
</tbody>
</table>

**BASE: GENERAL PUBLIC (1000)**

Q7. How often would you say you notice billboards, outdoor video screens, posters, signage, and other outdoor ads while doing each of the following?

- **89% Urban 1M+**
- **79% Urban <1M**
- **8%**
- **7%**
- **6%**

**67% Urban 1M+**
Even During the Winter Months When People Are Indoors More, 41% Are Noticing OOH More, Especially Younger Consumers

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</th>
<th>January 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Suburban</td>
</tr>
<tr>
<td>Yes</td>
<td>33%</td>
</tr>
<tr>
<td>Yes, much more</td>
<td></td>
</tr>
<tr>
<td>Yes, slightly more</td>
<td></td>
</tr>
<tr>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Not sure</td>
<td></td>
</tr>
</tbody>
</table>

+5 pts increase in those notice OOH “much more”

**BASE: GENERAL PUBLIC (1000)**
Q6. Would you say you are noticing billboards, outdoor video screens, posters, signage, and other outdoor ads more now than before the pandemic began?
Looking Ahead, Nearly a Third Plan to Travel and Over a Quarter Plan on Taking a Road Trip – Especially Gen Z

Thinking ahead to the next few months during the COVID-19 pandemic, how often would you say you plan on traveling outside of your typical routine?

<table>
<thead>
<tr>
<th>Activity</th>
<th>At least once (Net)</th>
<th>Often</th>
<th>A few times</th>
<th>Once or twice</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traveling outside of my local routine</td>
<td>62%</td>
<td>7%</td>
<td>20%</td>
<td>34%</td>
<td>38%</td>
</tr>
<tr>
<td>Taking a road trip</td>
<td>61%</td>
<td>8%</td>
<td>18%</td>
<td>34%</td>
<td>39%</td>
</tr>
<tr>
<td>Traveling to another state</td>
<td>53%</td>
<td>8%</td>
<td>11%</td>
<td>34%</td>
<td>47%</td>
</tr>
<tr>
<td>Taking an international trip (or traveling outside the US)</td>
<td>23%</td>
<td>5%</td>
<td>8%</td>
<td>10%</td>
<td>77%</td>
</tr>
</tbody>
</table>

- 73% of Millennials
- 81% of Gen Z
- 67% of Millennials
- 35% of HHI $150k+

BASE: GENERAL PUBLIC (1000)

Q4. Thinking ahead to the next few months during the COVID-19 pandemic, how often would you say you plan on traveling outside of your typical routine?
PART 2: WHAT'S RESONATING WITH CONSUMERS RIGHT NOW

OOH Messaging Amid COVID
To the best of your knowledge, would you say you typically remember seeing outdoor ads from billboards, outdoor video screens, posters, signage, etc. about each of the following?

- Local restaurants
- TV shows or movies
- Political candidates
- Public events (e.g., fairs, trade shows)
- New brands or products
- Local retail or convenience stores
- New businesses in your area
- Sporting events or concerts
- Sports gambling

**BASE: GENERAL PUBLIC (1000)**

Q8. To the best of your knowledge, would you say you typically remember seeing outdoor ads from billboards, outdoor video screens, posters, signage, etc. about each of the following?
OOH is Leading Consumers to Discover New Businesses and Brands, and Influencing Their Path to Purchase Especially Urbanites 1M+

Which of the following actions have billboards, outdoor video screens, posters, signage, and other outdoor ads led you to do in the past year? Please select all that apply.

- Informed me of new businesses in my area
- Helped me discover a new brand
- Influenced my decision to buy a product or service
- Helped me find a store or business while I was traveling
- Increased my favorability of a brand
- Influenced my decision to vote for a political candidate or issue
- Inspired me to take a trip or vacation
- Something else

**BASE:** GENERAL PUBLIC (1000)

Q9. Which of the following actions have billboards, outdoor video screens, posters, signage, and other outdoor ads led you to do in the past year? Please select all that apply.
Over Half of Consumers Notice OOH About Public Safety, and Almost Two-Thirds of Consumers in Large Urban Areas 1M+

Have you seen any messages about public safety and security on outdoor video screen, poster, signage, billboards, and other outdoor ads such as local public safety, health updates and COVID protocols, curfew alerts, weather warnings, etc.?

% Yes

<table>
<thead>
<tr>
<th>Category</th>
<th>General Public</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>
</tr>
</thead>
<tbody>
<tr>
<td>% Yes</td>
<td>51%</td>
<td>48%</td>
<td>38%</td>
<td>64%</td>
<td>46%</td>
<td>59%</td>
<td>64%</td>
<td>51%</td>
<td>43%</td>
</tr>
</tbody>
</table>

BASE: GENERAL PUBLIC (1000)

Q13. Have you seen any messages about public safety and security on outdoor video screen, poster, signage, billboards, and other outdoor ads such as local public safety, health updates and COVID protocols, curfew alerts, weather warnings, etc.?
Over 70% say OOH Public Safety Messaging Makes Them Feel Informed and Safe

How useful do you find messages on billboards, bus shelters, or other outdoor signage are in providing essential information about public safety such as local public safety, health updates and COVID protocols, curfew alerts, weather warnings, etc.?

- I don't find them to be useful, 29%
- They make me feel somewhat more informed and safe, 46%
- They make me feel very informed and more safe, 25%
- 71% Informed and safe

Suburban: 72%
Rural: 65%
Urban 1M+: 79%
Urban <1M: 69%
Gen Z: 76%
Millennial: 81%
Gen X: 79%
Boomer+: 60%
Everyday Commuter: 75%
Occasional Commuter: 84%

BASE: GENERAL PUBLIC (1000)
Q15. How useful have you found messages on billboards, bus shelters, or other outdoor signage are in providing essential information about public safety such as local public safety, health updates and COVID protocols, curfew alerts, weather warnings, etc.?
PART 3:
Digital Transformation Implications for OOH
Over 4 in 10 Are Using Contactless Payments More; Overall One-Fifth or More Are Using New Technologies During the Pandemic

Are you using any of the following technologies more since the start of the pandemic?

- Contactless transactions
  - Not sure: 9%
  - No: 43%
  - Yes: 48%
  - Distribution by Generation:
    - 36% Gen Z
    - 49% Millennial
    - 53% Gen X
    - 35% Boomer+

- QR codes
  - Not sure: 10%
  - No: 59%
  - Yes: 31%
  - Distribution by Region:
    - 35% West
    - 28% Mountain/Plains
    - 25% Midwest
    - 45% Northeast
    - 48% South
    - 32% Mid-Atlantic

- Augmented reality
  - Not sure: 11%
  - No: 19%
  - Yes: 70%
  - Distribution by Urbanicity:
    - 14% Suburban
    - 11% Rural
    - 34% Urban 1M+
    - 13% Urban <1M
**Millennials, Urban Areas 1M+ Are Highest Users of New Technologies**

Are you using any of the following technologies more since the start of the pandemic?

<table>
<thead>
<tr>
<th>Contactless transactions</th>
<th>QR codes</th>
<th>Augmented reality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Z</td>
<td>Gen Z</td>
<td>Gen Z</td>
</tr>
<tr>
<td>Millennial</td>
<td>Millennial</td>
<td>Millennial</td>
</tr>
<tr>
<td>Gen X</td>
<td>Gen X</td>
<td>Gen X</td>
</tr>
<tr>
<td>Boomer+</td>
<td>Boomer+</td>
<td>Boomer+</td>
</tr>
<tr>
<td>Urban 1M+</td>
<td>Urban 1M+</td>
<td>Urban 1M+</td>
</tr>
<tr>
<td>Urban &lt;1M</td>
<td>Urban &lt;1M</td>
<td>Urban &lt;1M</td>
</tr>
<tr>
<td>Suburban</td>
<td>Suburban</td>
<td>Suburban</td>
</tr>
<tr>
<td>Rural</td>
<td>Rural</td>
<td>Rural</td>
</tr>
<tr>
<td>West</td>
<td>West</td>
<td>West</td>
</tr>
<tr>
<td>Mountain/Great Plains</td>
<td>Mountain/Great Plains</td>
<td>Mountain/Great Plains</td>
</tr>
<tr>
<td>Midwest</td>
<td>Midwest</td>
<td>Midwest</td>
</tr>
<tr>
<td>Northeast</td>
<td>Northeast</td>
<td>Northeast</td>
</tr>
<tr>
<td>South</td>
<td>South</td>
<td>South</td>
</tr>
<tr>
<td>Mid-Atlantic</td>
<td>Mid-Atlantic</td>
<td>Mid-Atlantic</td>
</tr>
</tbody>
</table>

**BASE: GENERAL PUBLIC (1000)**

Q11. Are you using any of the following technologies more since the start of the pandemic?

**Harris Insights & Analytics LLC, A Stagwell Company © 2020**
Over 4 in 10 Are Interested in Contactless Payments and QR Codes; Overall One-Quarter or More Would Be Interested in Sales from New Technologies

Would you be interested in special sales or deals available through these types of technologies?

**Contactless transactions**
- **Yes**: 45%
- **No**: 16%
- **Not sure**: 40%

**QR codes**
- **Yes**: 41%
- **No**: 17%
- **Not sure**: 42%

**Augmented reality**
- **Yes**: 54%
- **No**: 18%
- **Not sure**: 28%

---

**BASE: GENERAL PUBLIC (1000)**

Q12: Would you be interested in special sales or deals available through these types of technologies?

- **$34% <$50k**
- **45% $50k-$99k**
- **48% $100-$150k**
- **61% $150k+**

- **48% Urban 1M+**
- **38% Urban <1M**
- **38% Suburban**
- **34% Rural**

- **47% Gen Z**
- **39% Millennial**
- **29% Gen X**
- **14% Boomer+**
## OAAA Q1 CONSUMER TRENDS FOR OOH

### But ‘Digital Device Burnout’ Continues to Rise and Most Are Seeking Relief Through Outdoor Activities

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

<table>
<thead>
<tr>
<th>Statement</th>
<th>% Agree</th>
<th>Change Sep '20</th>
</tr>
</thead>
<tbody>
<tr>
<td>These days, I spend so much time looking at computer, mobile device, and TV screens that I often tune out digital ads.</td>
<td>75%</td>
<td>+7</td>
</tr>
<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>72%</td>
<td>+7</td>
</tr>
<tr>
<td>I’ve been trying to find safe outdoor activities to spend my time.</td>
<td>71%</td>
<td>+6</td>
</tr>
<tr>
<td>I wish there were more outdoor dining offerings.</td>
<td>66%</td>
<td>+6</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>43%</td>
<td>-</td>
</tr>
</tbody>
</table>

**BASE:** GENERAL PUBLIC (1000)

Q10. How much do you agree or disagree with each of the following statements?

Harris Insights & Analytics LLC, A Stagwell Company © 2020
Gen Z Want More Outdoor Dining; Millennials to Simply Get Outside

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

<table>
<thead>
<tr>
<th>Statement</th>
<th>% Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>These days, I spend so much time looking at computer, mobile device, and TV screens that I often tune out digital ads.</td>
<td>71%</td>
</tr>
<tr>
<td>I wish there were more outdoor dining offerings.</td>
<td>69%</td>
</tr>
<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>63%</td>
</tr>
<tr>
<td>I've been trying to find safe outdoor activities to spend my time.</td>
<td>60%</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>41%</td>
</tr>
</tbody>
</table>

BASE: GENERAL PUBLIC (1000)
Q10. How much do you agree or disagree with each of the following statements?
### This Winter, Millennials Are the Most Likely to Be Seeking Outdoor Activities

Which of the following outdoor activities have you done or plan to do this winter during COVID-19 pandemic? Please select all that apply.

<table>
<thead>
<tr>
<th>Activity</th>
<th>General Public</th>
<th>Gen Z</th>
<th>Millennial</th>
<th>Gen X</th>
<th>Boomer+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking or running in my neighborhood</td>
<td>58%</td>
<td>57%</td>
<td>63%</td>
<td>61%</td>
<td>63%</td>
</tr>
<tr>
<td>Going to public parks</td>
<td>28%</td>
<td>30%</td>
<td>35%</td>
<td>28%</td>
<td>31%</td>
</tr>
<tr>
<td>Shopping in outdoor areas</td>
<td>28%</td>
<td>28%</td>
<td>37%</td>
<td>28%</td>
<td>37%</td>
</tr>
<tr>
<td>Outdoor dining</td>
<td>25%</td>
<td>25%</td>
<td>29%</td>
<td>25%</td>
<td>29%</td>
</tr>
<tr>
<td>Recreation such as hiking, visiting national parks, or the beach</td>
<td>23%</td>
<td>23%</td>
<td>29%</td>
<td>23%</td>
<td>29%</td>
</tr>
<tr>
<td>Spending time in downtown areas</td>
<td>17%</td>
<td>17%</td>
<td>23%</td>
<td>17%</td>
<td>23%</td>
</tr>
<tr>
<td>Skiing, sledding, or other snow activities</td>
<td>4%</td>
<td>4%</td>
<td>10%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Attending theme or amusement parks</td>
<td>8%</td>
<td>8%</td>
<td>18%</td>
<td>8%</td>
<td>18%</td>
</tr>
<tr>
<td>None of the above</td>
<td>22%</td>
<td>22%</td>
<td>29%</td>
<td>22%</td>
<td>29%</td>
</tr>
</tbody>
</table>

**BASE: GENERAL PUBLIC (1000)**

Q5. Which of the following outdoor activities have you done or plan to do this winter during COVID-19 pandemic? Please select all that apply.
Implications & Recommendations

**OOH is having outsized success with Urbanites 1M+, and there is opportunity to replicate impact for Urbanites <1M on the road:** (55%) of Urbanites 1M+ are noticing OOH more today vs (36%) of Urbanites <1M and (34%) of Urbanites 1M+ are being influenced by OOH in their purchasing decisions vs (15%) of Urbanites <1M. What’s interesting is that (73%) of Urbanites <1M will be using their car to commute after the pandemic vs (56%) of Urban 1M+, indicating there is opportunity for OOH to engage Urbanites <1m on roadways.

**There’s an opportunity for OOH to play a bigger role in addressing COVID.** Harris Poll data shows strong majority of consumers want brands to address COVID in their advertisements, and with the vaccine roll out, many of these are messages are using OOH platforms. But right now, less than a third are learning about COVID via OOH.

**OOH, particularly digital OOH, should get ready for a renaissance marked by unconventional timelines:** Pent up demand is growing, especially for experiences and consumers plan on making up for lost time which means they will be be less constrained by traditional calendar milestones. But the no contact lifestyle is becoming increasingly prevalent as consumers seek to minimize activities seen as unsanitary and potentially risky to their health. It’s critical to be “touchless” ready across all channels – physical and digital. Marketers will be searching for the right balance of contactless yet with a human touch.