

# Consumer Insights and Intent - Q1

## OOH Opportunities

February 10, 2021



Out of Home Advertising Association of America



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Dates January 15<sup>th</sup> to 20<sup>th</sup>, 2021

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Survey Length 11 minutes

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Method Online

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Audience General Public (n=1,000)

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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.



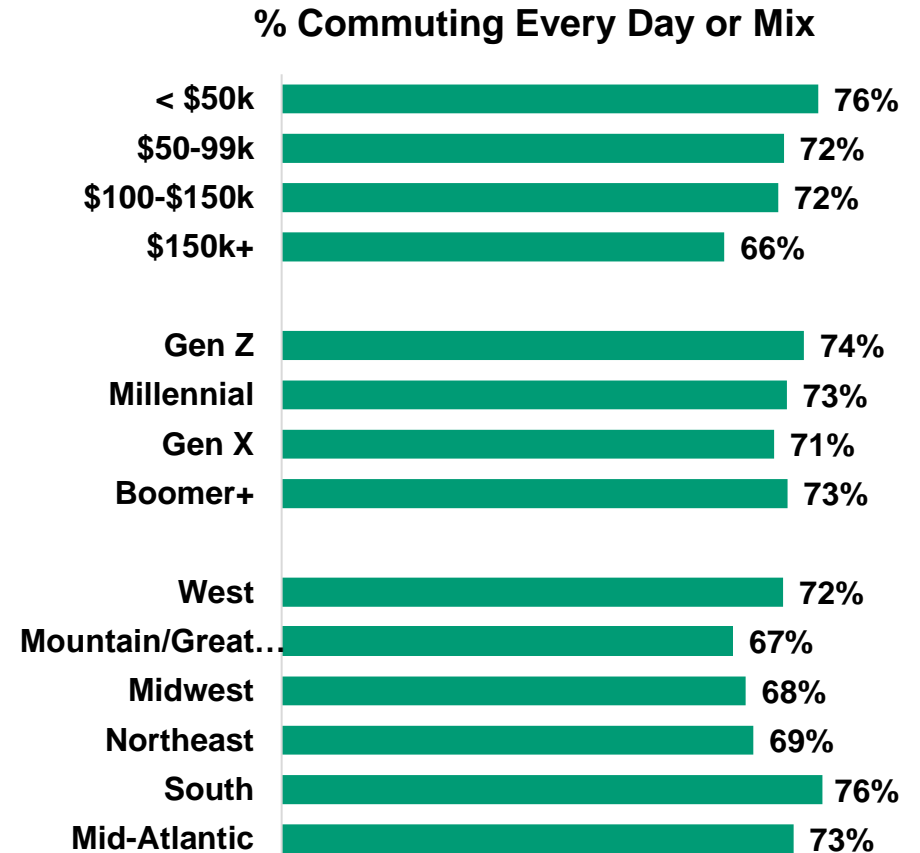
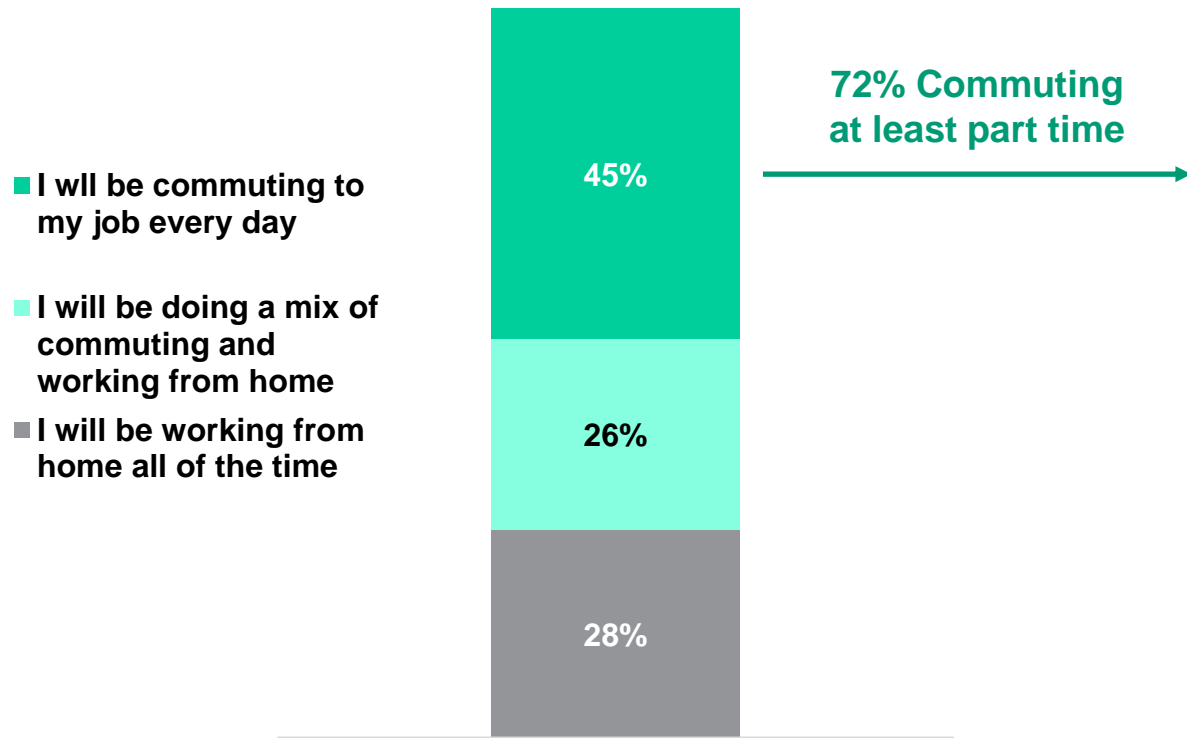
PART 1: MEETING CONSUMERS WHERE THEY ARE

# 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?



BASE: EMPLOYED (546)

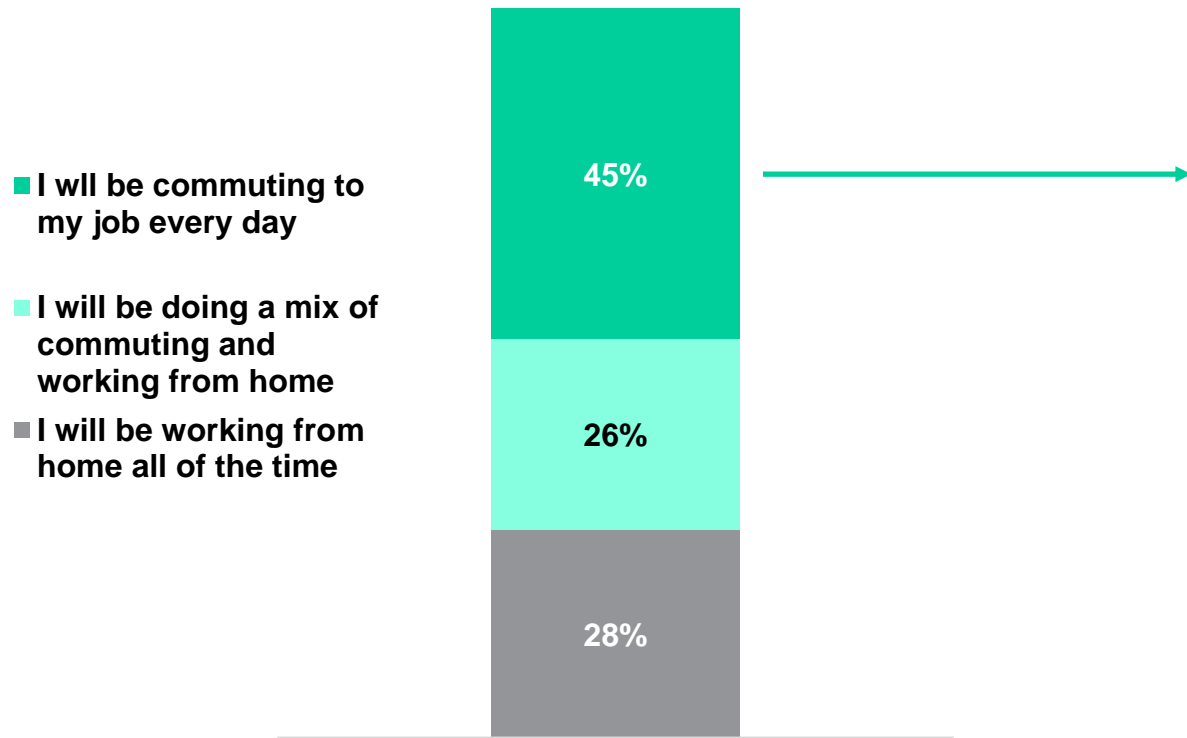
Q1. Looking ahead to these next few months during the COVID-19 pandemic, which of the following best describes your work situation?

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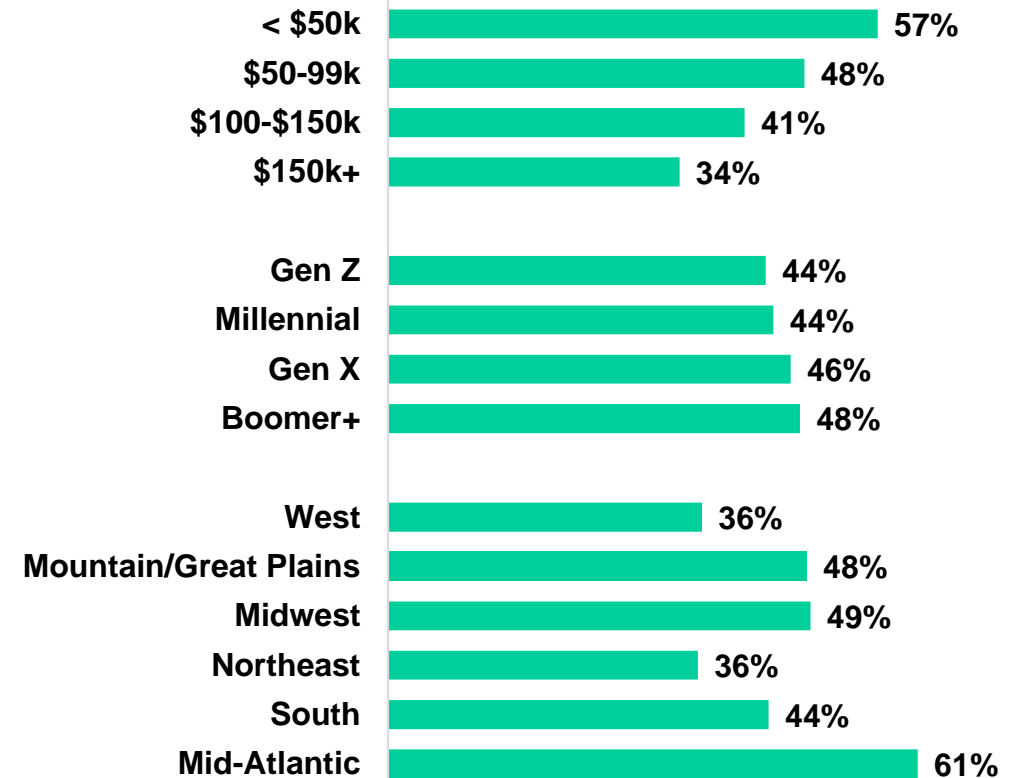


# Over 4 in 10 Workers Will Be Commuting Everyday, With Notable Variances by Income and Geographic Region

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



% Commuting Everyday



BASE: EMPLOYED (546)

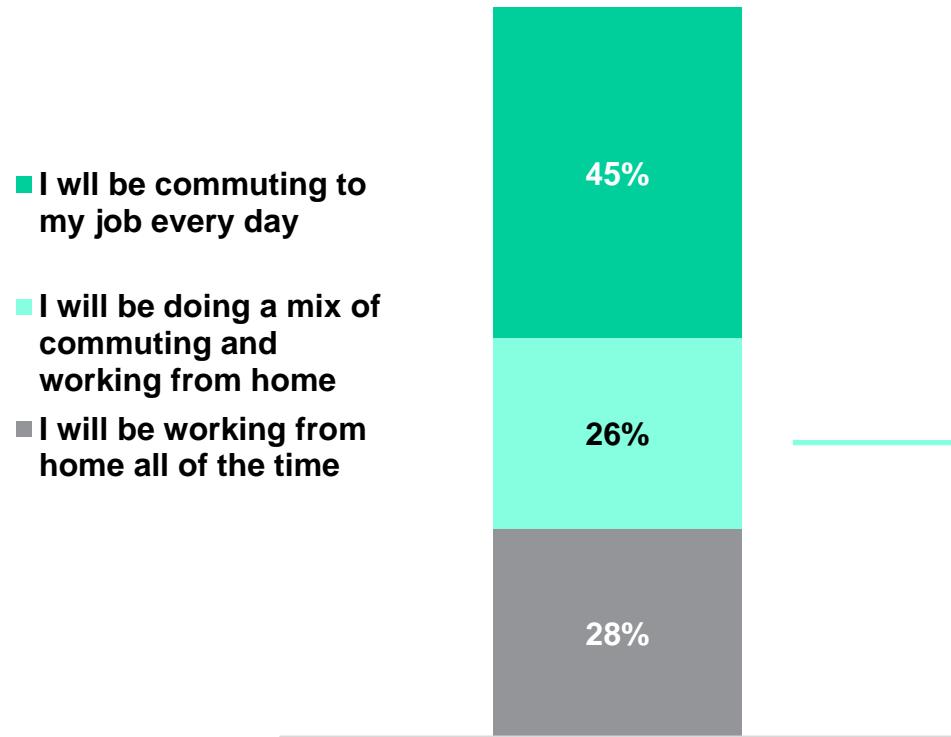
Q1. Looking ahead to these next few months during the COVID-19 pandemic, which of the following best describes your work situation?

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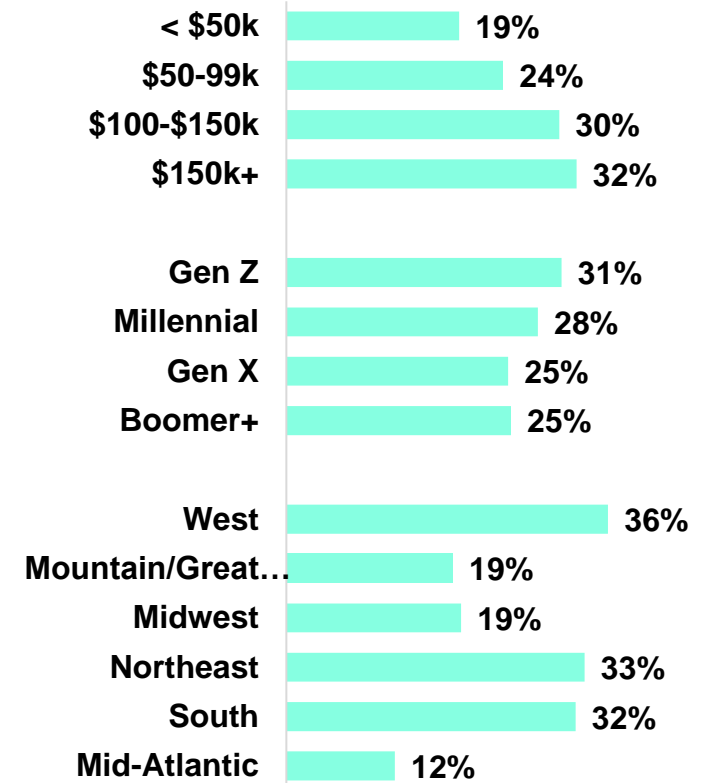


# And Over a Quarter Will Be Taking a Mixed Approach, Especially Those in the West, Northeast and South

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



% Doing a Mix of Community / Working From Home



BASE: EMPLOYED (546)

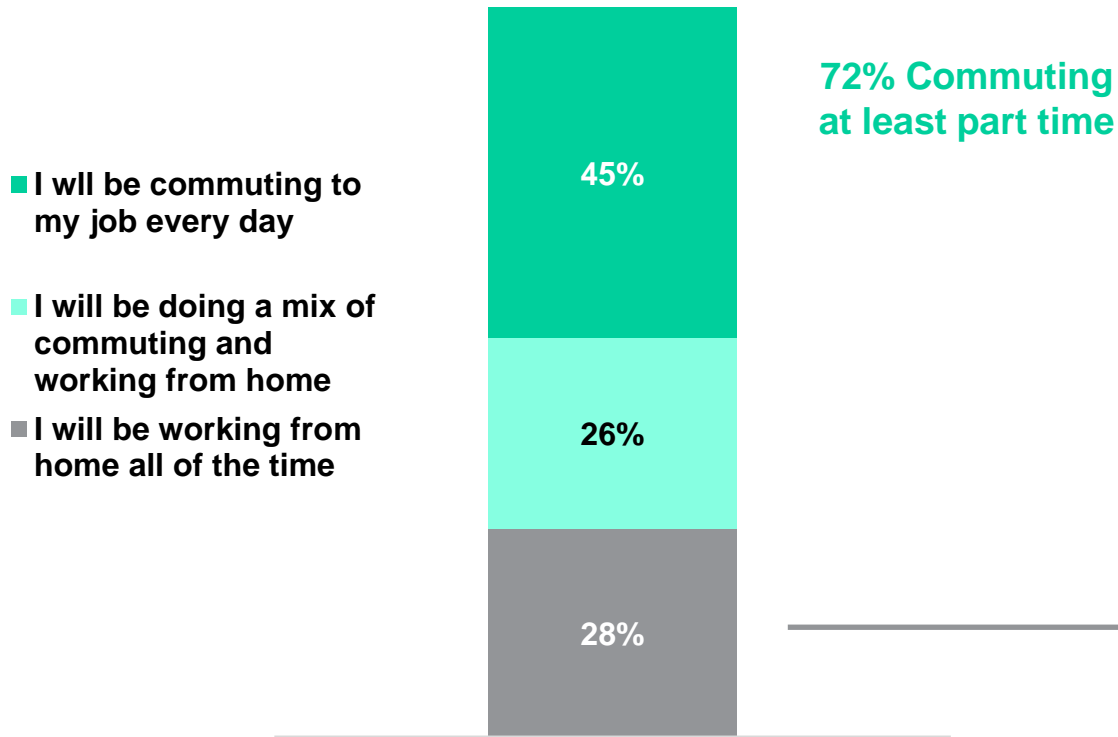
Q1. Looking ahead to these next few months during the COVID-19 pandemic, which of the following best describes your work situation?

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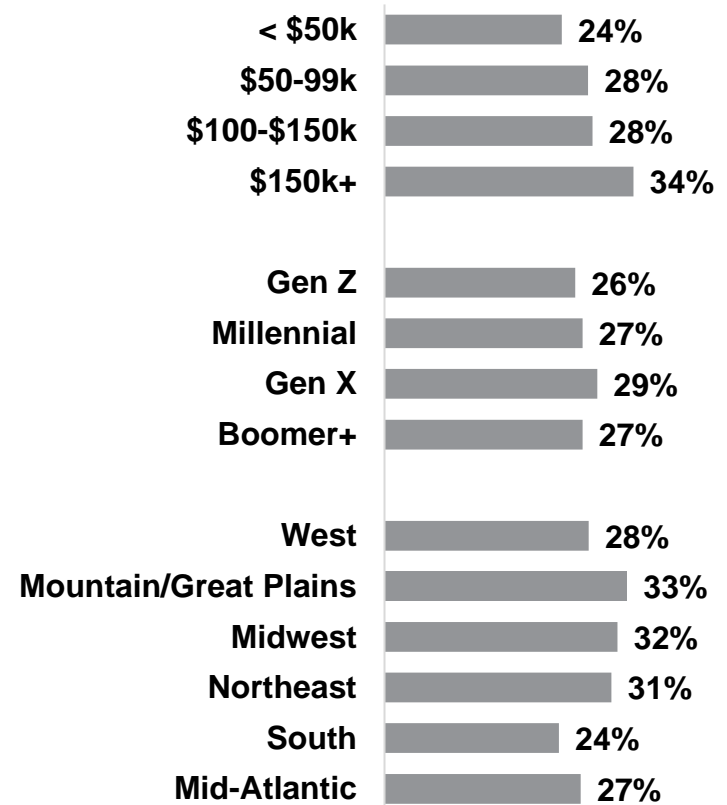


# While Only About A One-Quarter Will Be Working-From-Home Entirely

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



% Working From Home All the Time



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?

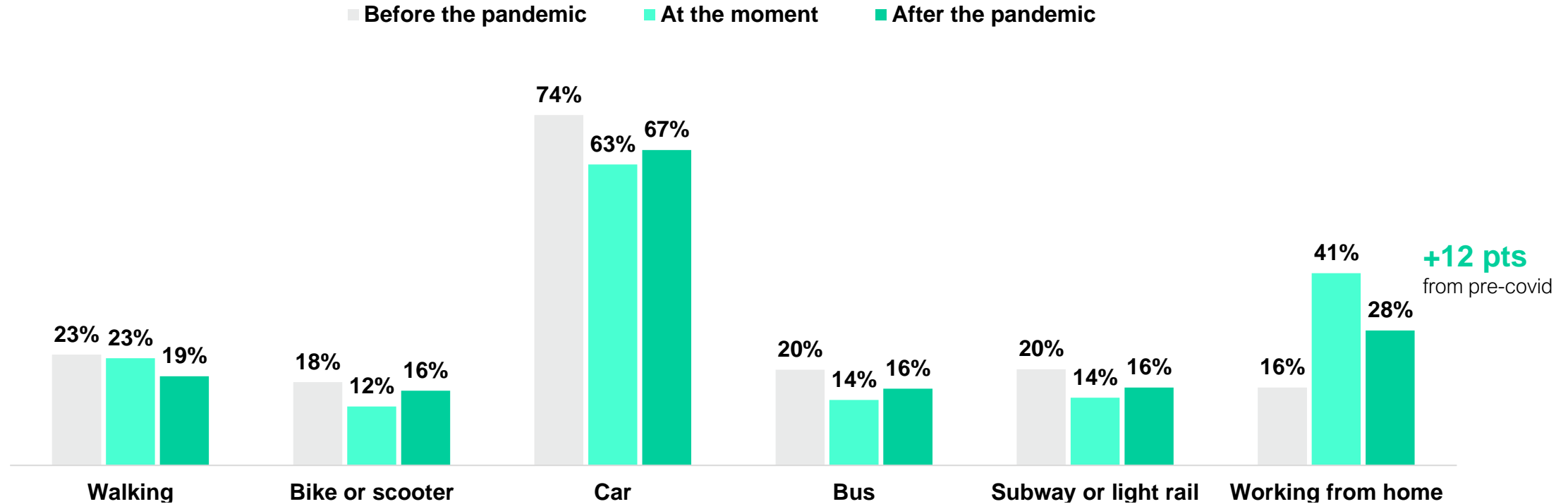
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# Vast Majority Will Be Commuting By Car After The Pandemic, but More Workers Will Be Working From Home Post-Pandemic Than Before

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



BASE: GENERAL PUBLIC (1000)

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.

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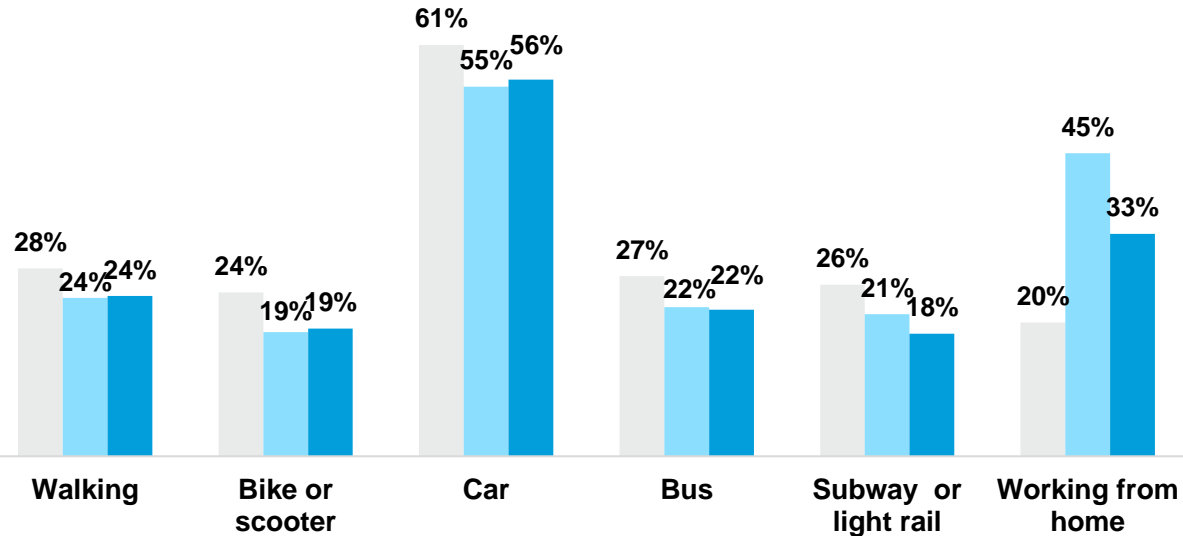


# Urbanites <1M Will Be Walking Less, Driving More Post-Pandemic

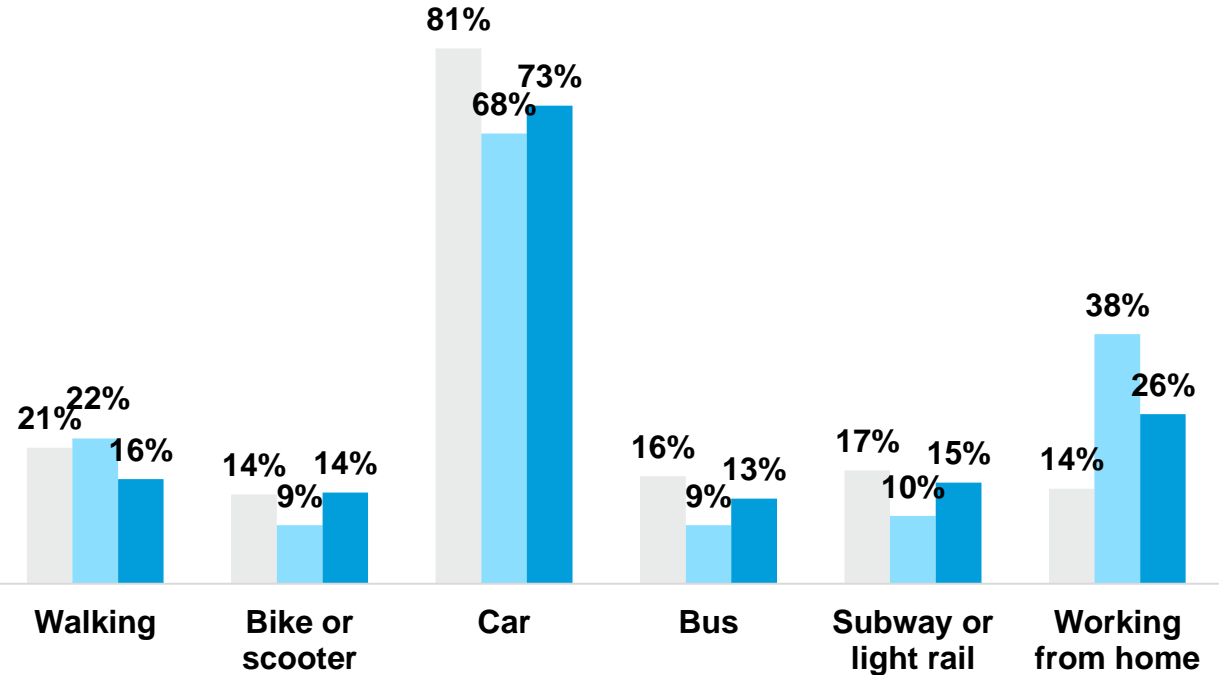
What would you say is your primary method of commuting to your job at each of the following time periods?

■ Before the pandemic ■ At the moment ■ After the pandemic

Urban 1M+



Urban <1M



BASE: GENERAL PUBLIC (1000)

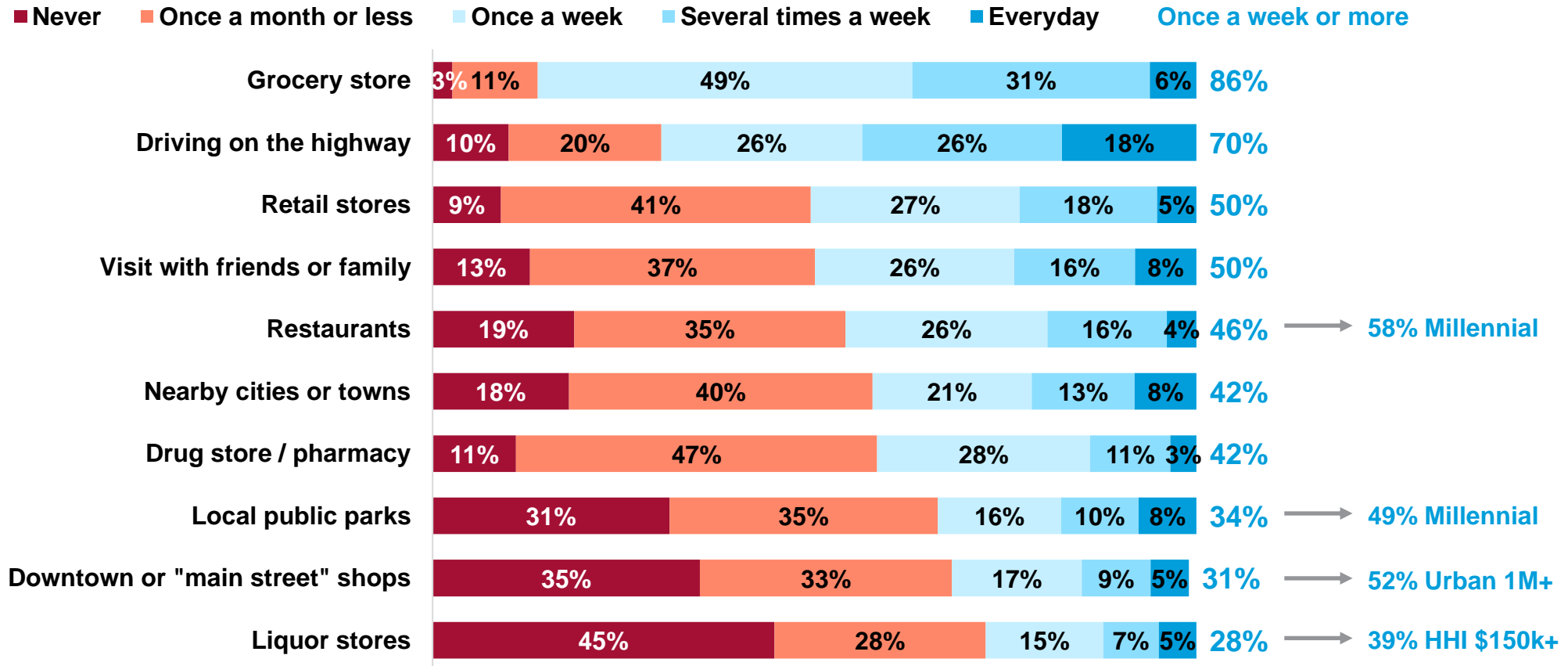
Q2. What would you say is your primary method of commuting to your job at each of the following time periods? Please select all that apply.

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# 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?



BASE: GENERAL PUBLIC (1000)

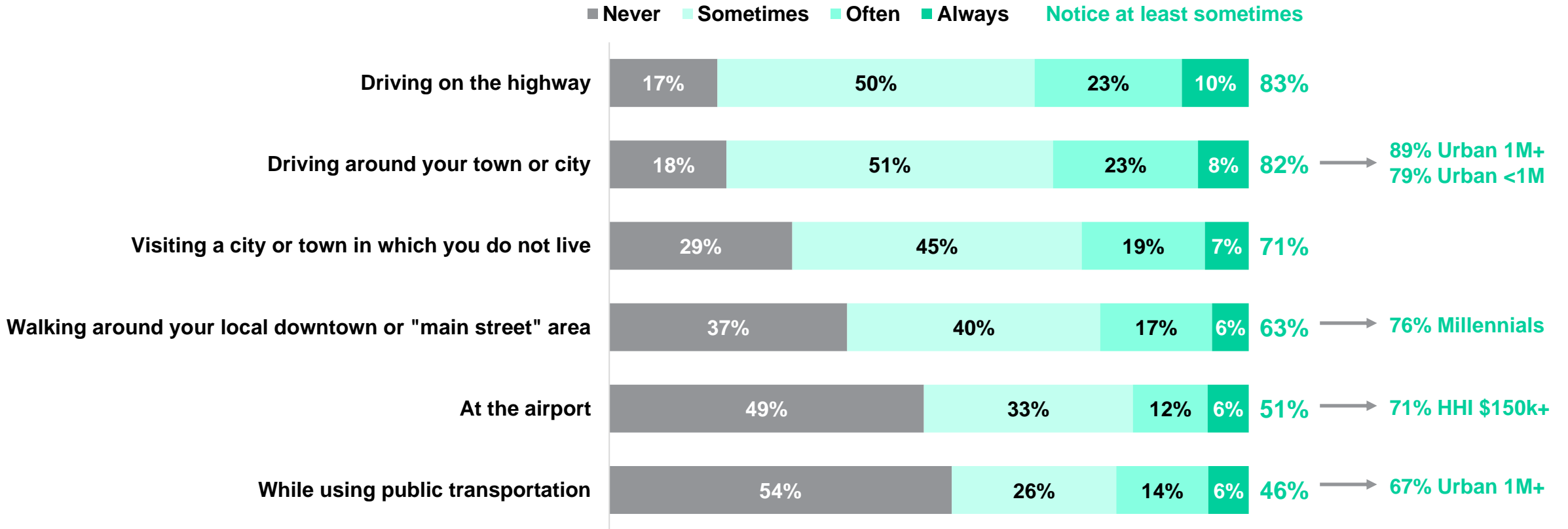
Q3. Thinking about your typical routine, how often do you visit or go to each of the following?

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# 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?



BASE: GENERAL PUBLIC (1000)

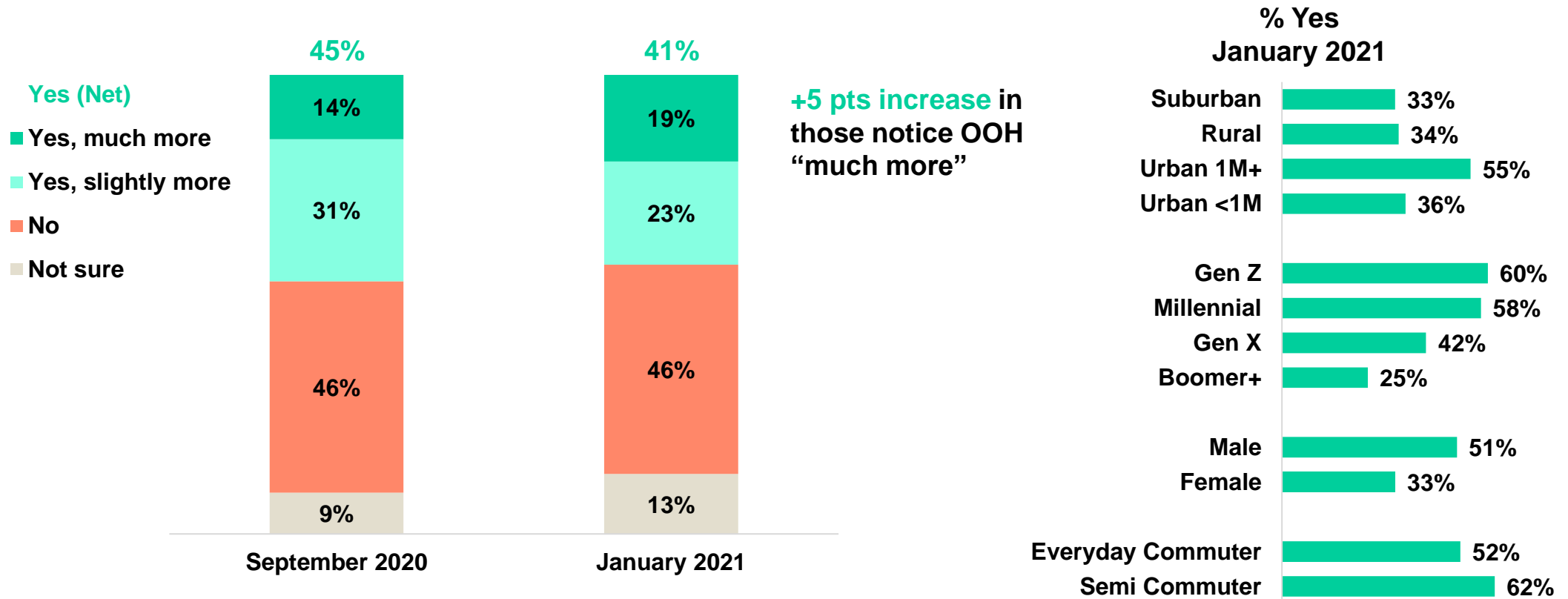
Q7. How often would you say you notice billboards, outdoor video screens, posters, signage, and other outdoor ads while doing each of the following?

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# 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?



BASE: GENERAL PUBLIC (1000)

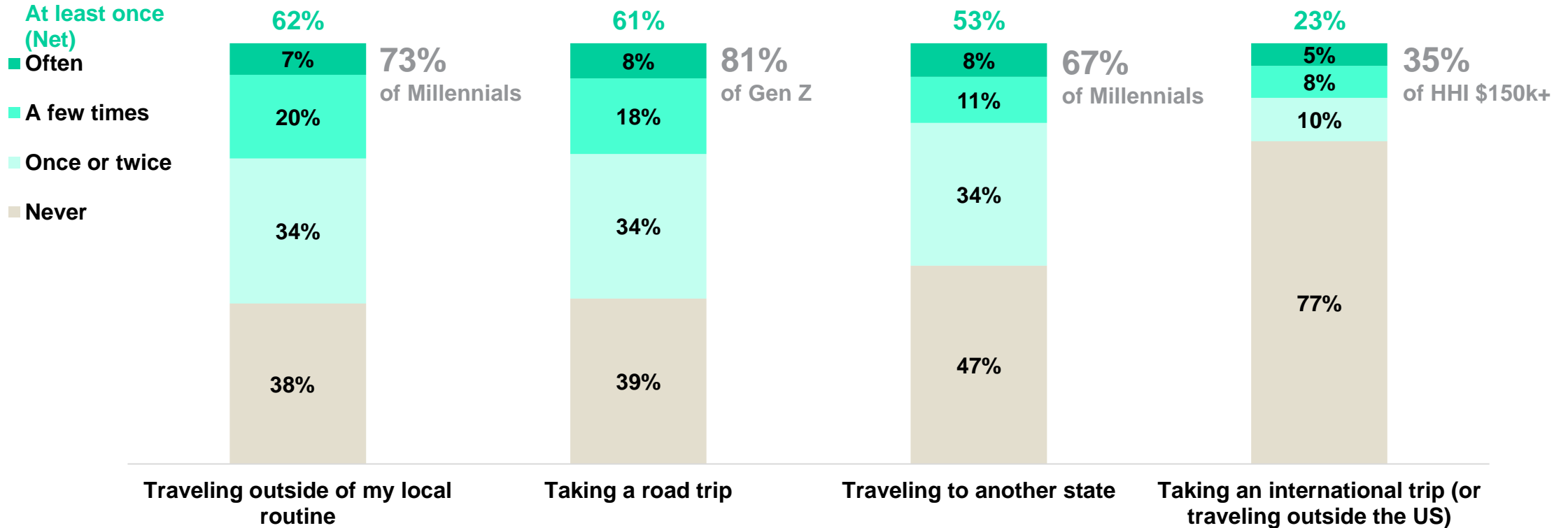
Q6. Would you say you are noticing billboards, outdoor video screens, posters, signage, and other outdoor ads more now than before the pandemic began?

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# 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?



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?

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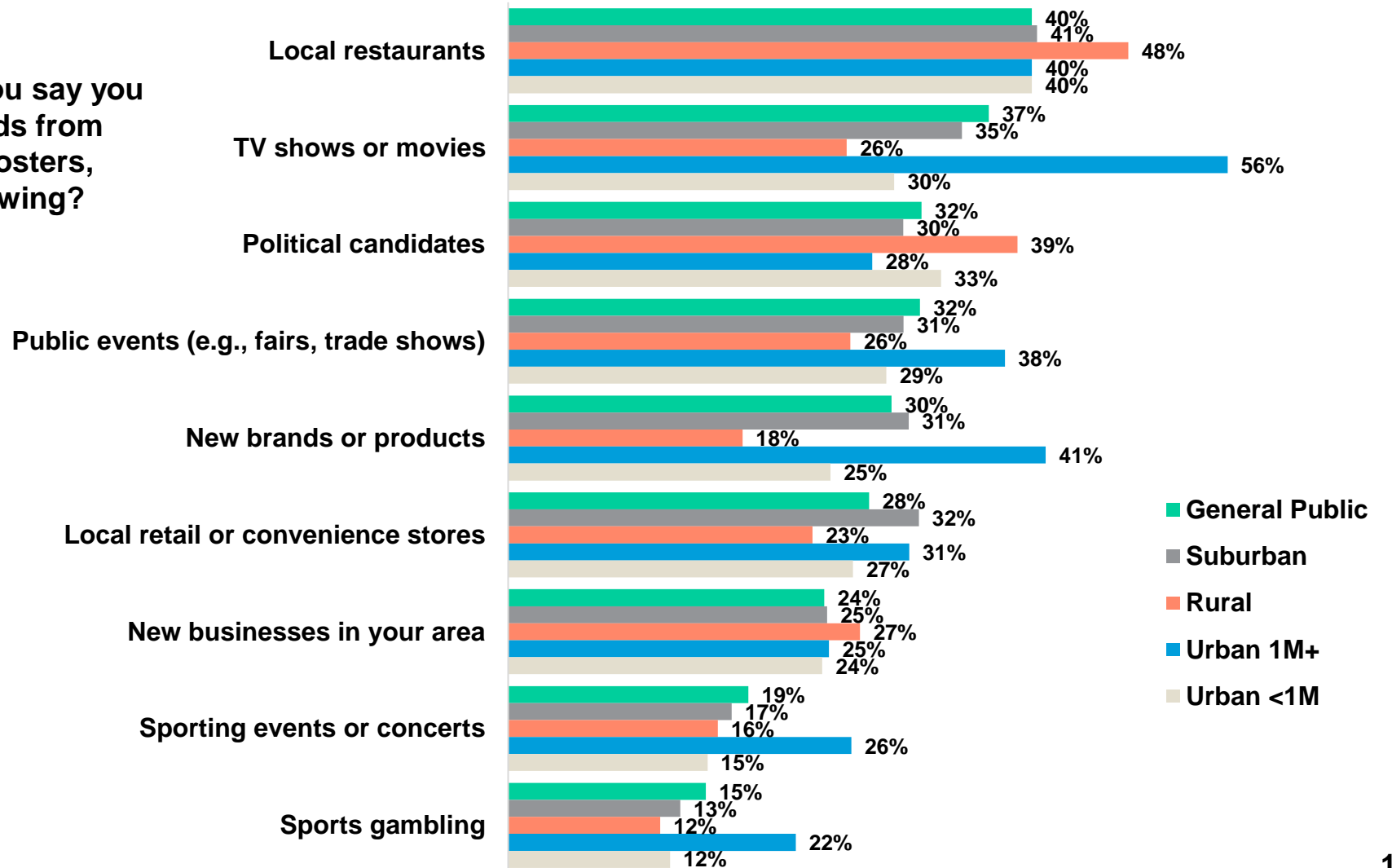
PART 2: WHAT'S RESONATING WITH CONSUMERS RIGHT NOW

# OOH Messaging Amid COVID



# OOH for Restaurants, TV & Movies, Politics, Public Events and New Products Is Most Memorable, While New Brands Especially Engage Urbanites 1M+

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?

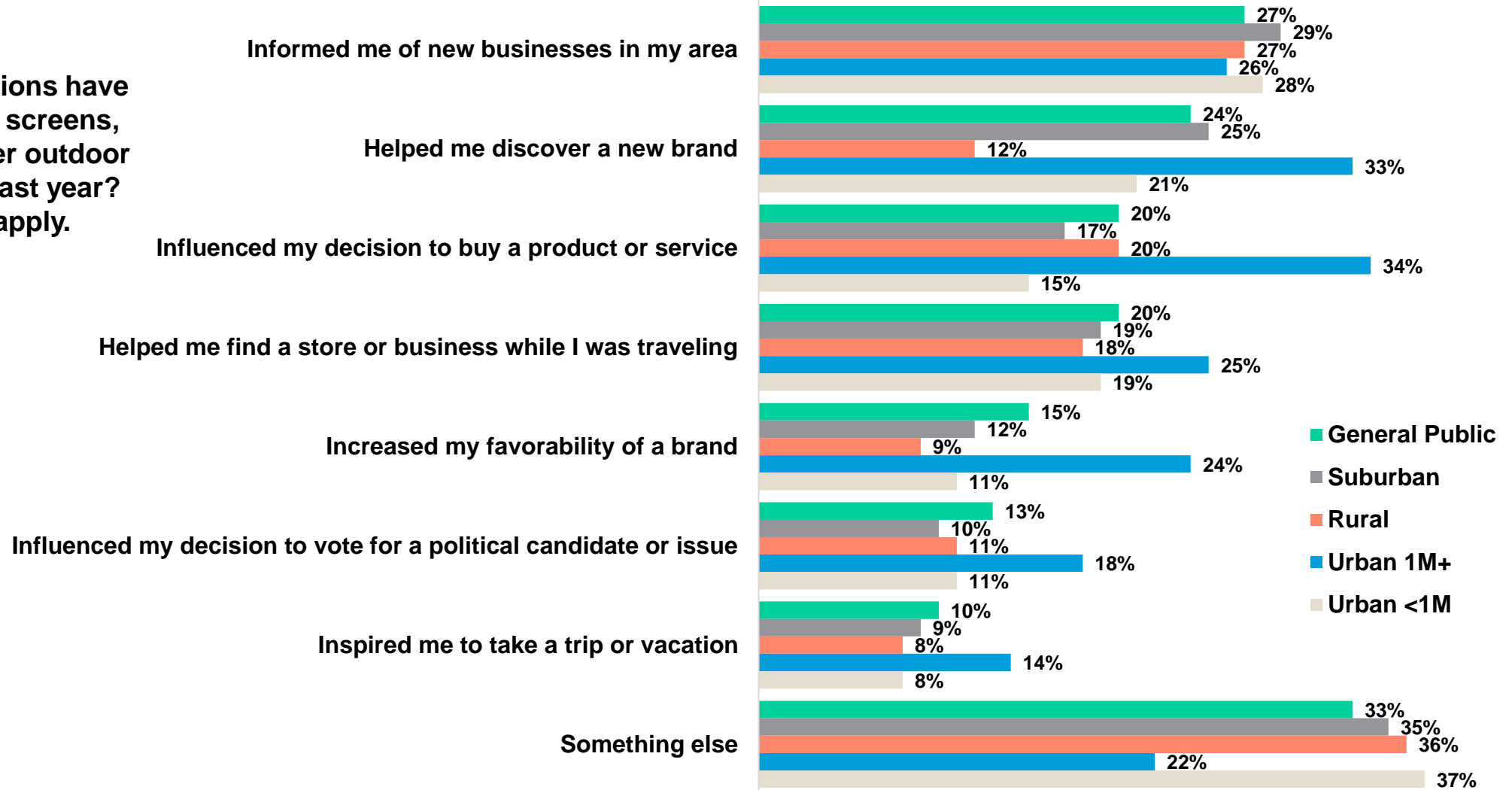






# OOH is Leading Consumers to Discover New Businesses and Brands, and Influencing Their Path to Purchase Especially Urbanites 1M+

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.

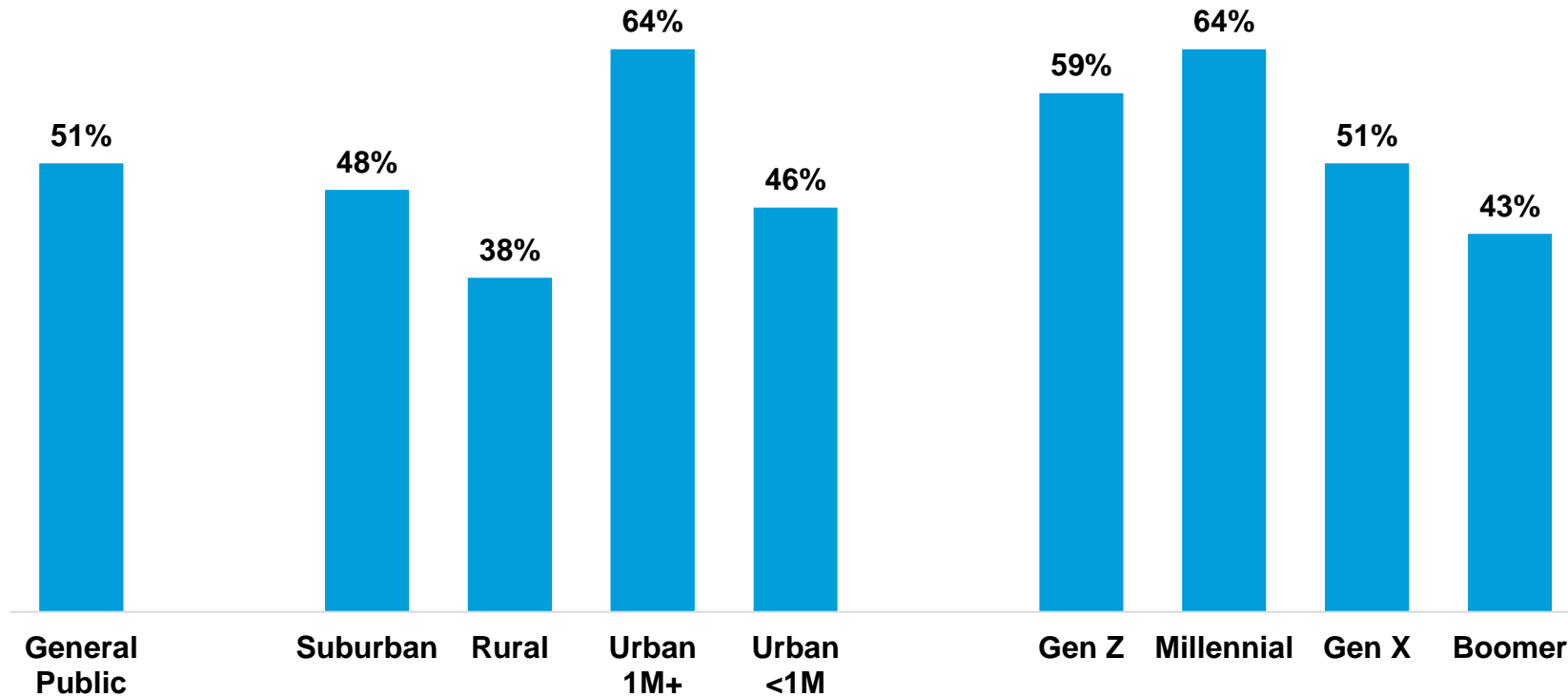




# Over Half of Consumers Notice OOH About Public Safety, and Almost Two-Thirds of Consumers in Large Urban Areas 1M+

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



BASE: GENERAL PUBLIC (1000)

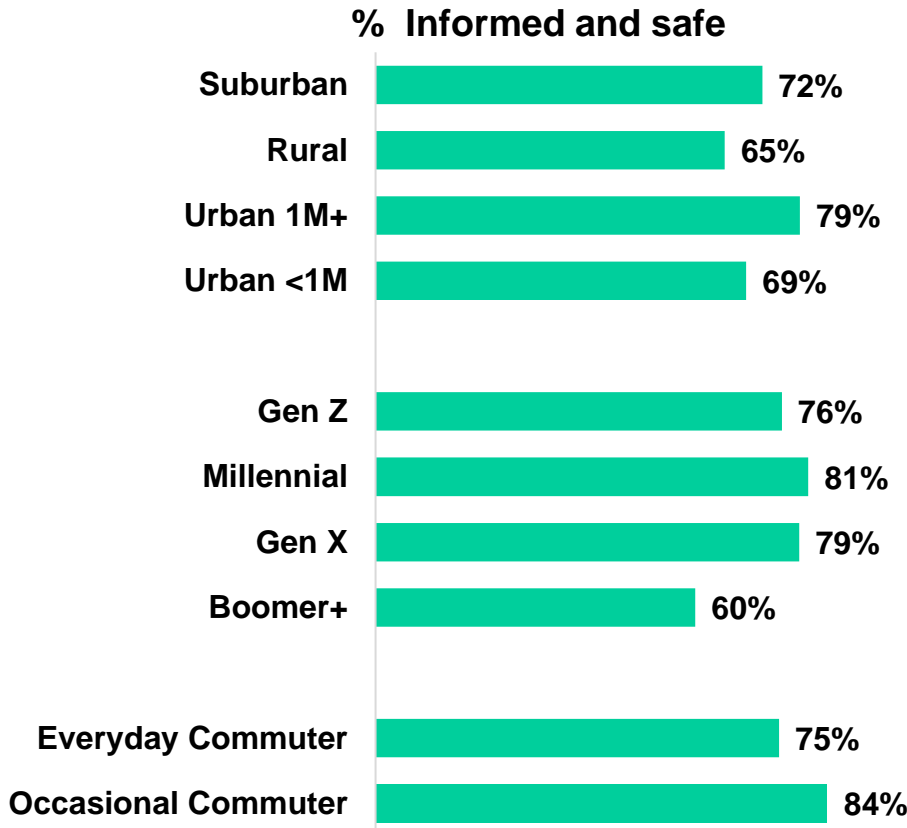
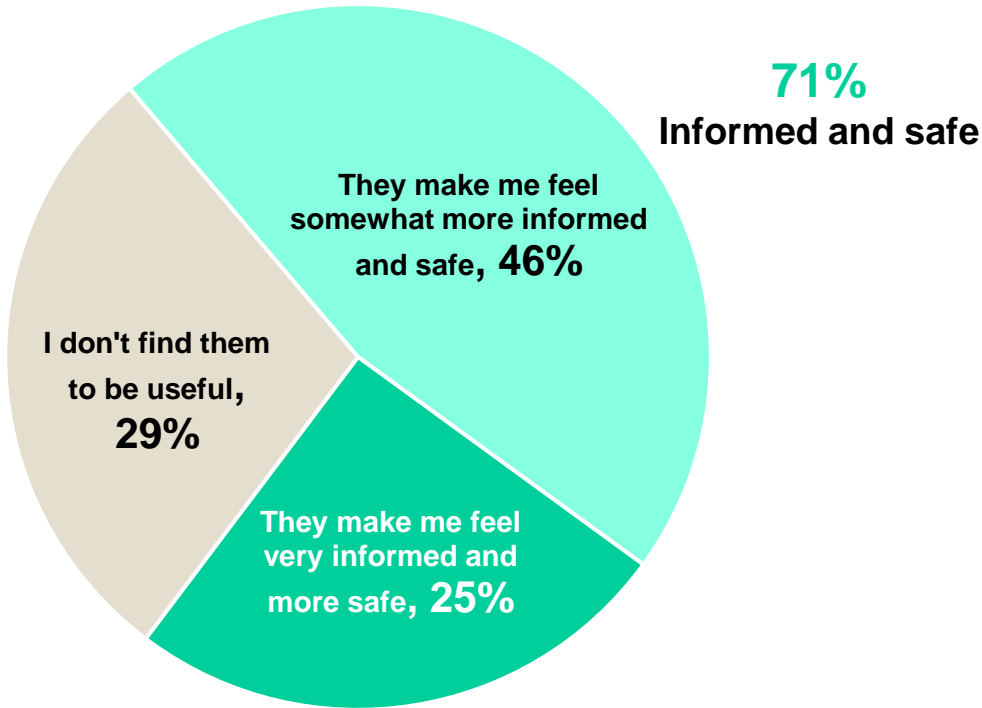
Q13. Have you seen any messages about public safety and security on outdoor video screen, poster, signage, billboards, and other outdoor ads such as local public safety, health updates and COVID protocols, curfew alerts, weather warnings, etc.?

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# 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.?



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

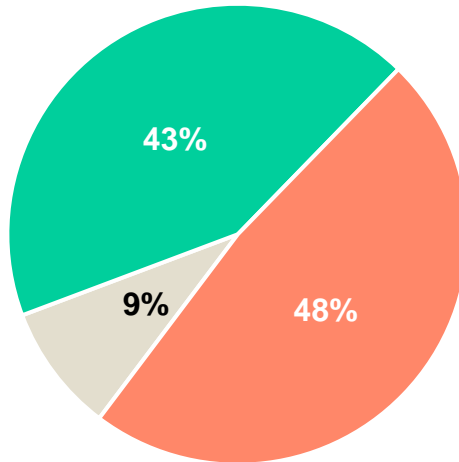


# Over 4 in 10 Are Using Contactless Payments More; Overall One-Fifth or More Are Using New Technologies During the Pandemic

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

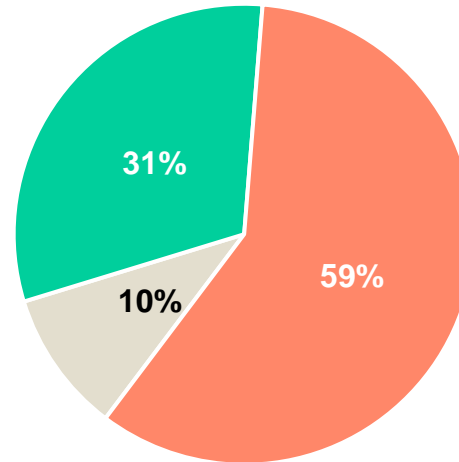
■ Not sure ■ No ■ Yes

**Contactless transactions**



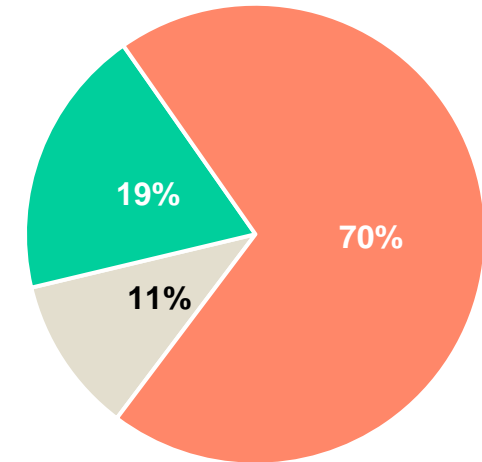
36% Gen Z  
49% Millennial  
53% Gen X  
35% Boomer+

**QR codes**



35% West  
28% Mountain/Plains  
25% Midwest  
45% Northeast  
28% South  
32% Mid-Atlantic

**Augmented reality**



14% Suburban  
11% Rural  
34% Urban 1M+  
13% Urban <1M

BASE: GENERAL PUBLIC (1000)

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

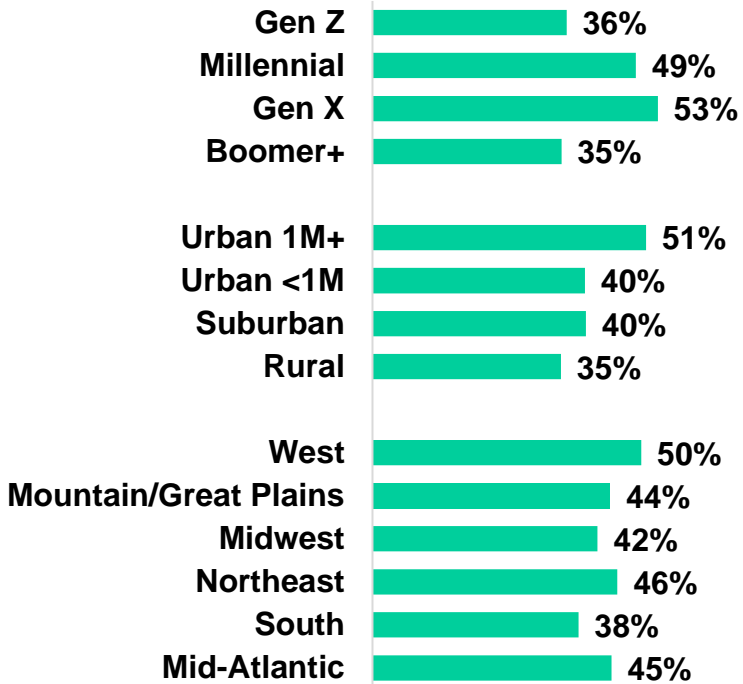
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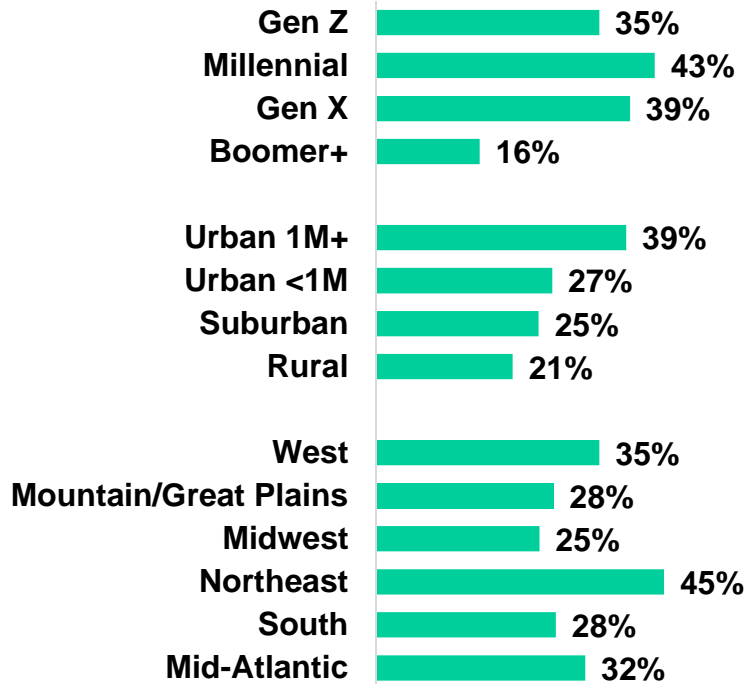
# Millennials, Urban Areas 1M+ Are Highest Users of New Technologies

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

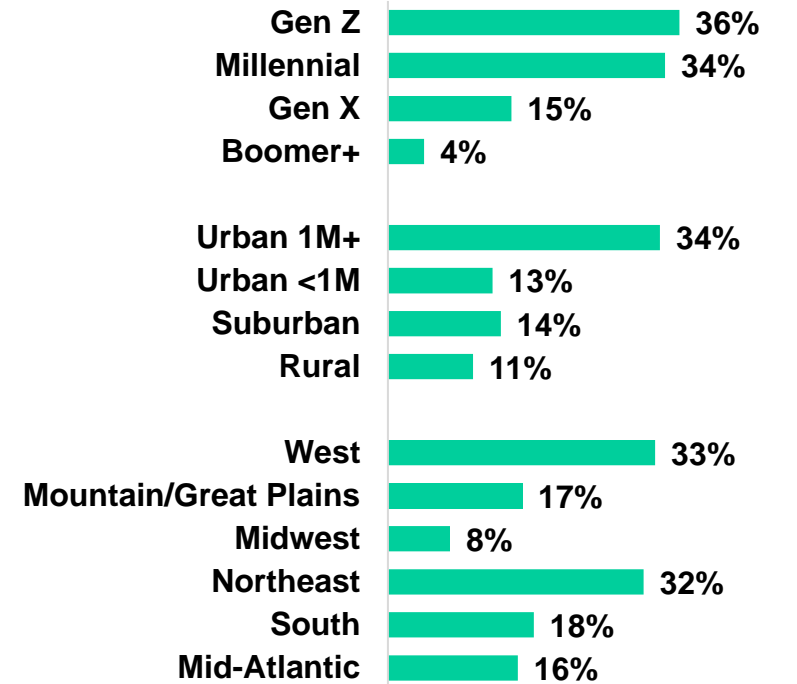
## Contactless transactions



## QR codes



## Augmented reality



BASE: GENERAL PUBLIC (1000)

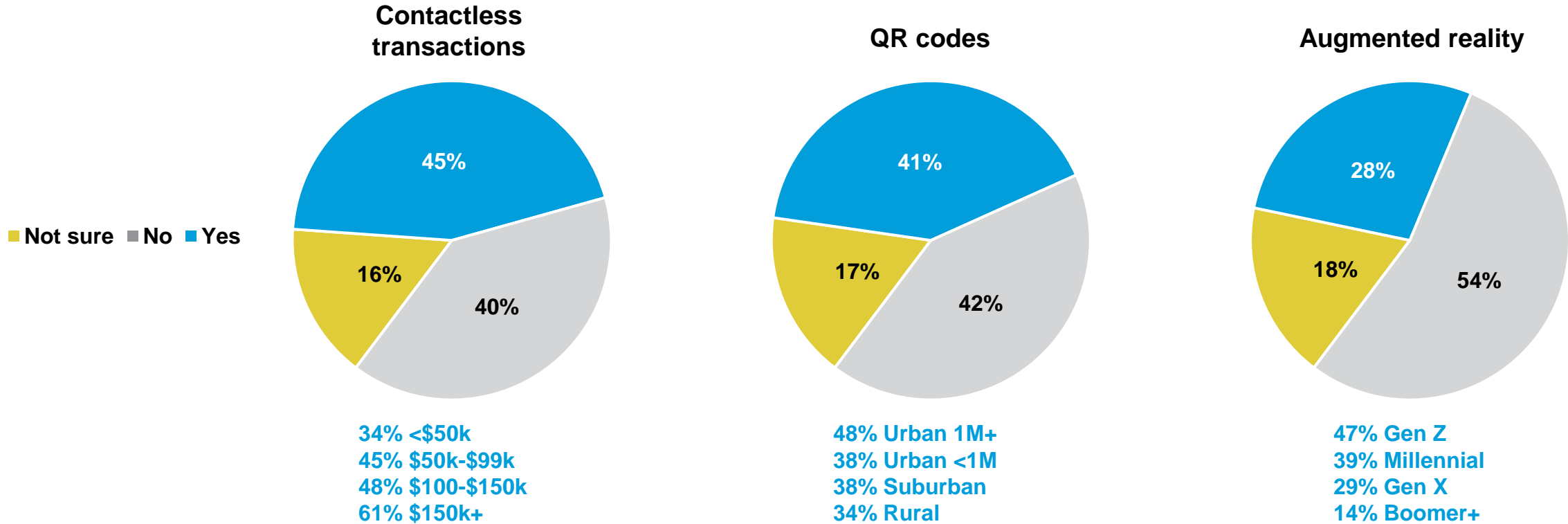
Q11. Are you using any of the following technologies more since the start of the pandemic?

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# 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?



BASE: GENERAL PUBLIC (1000)

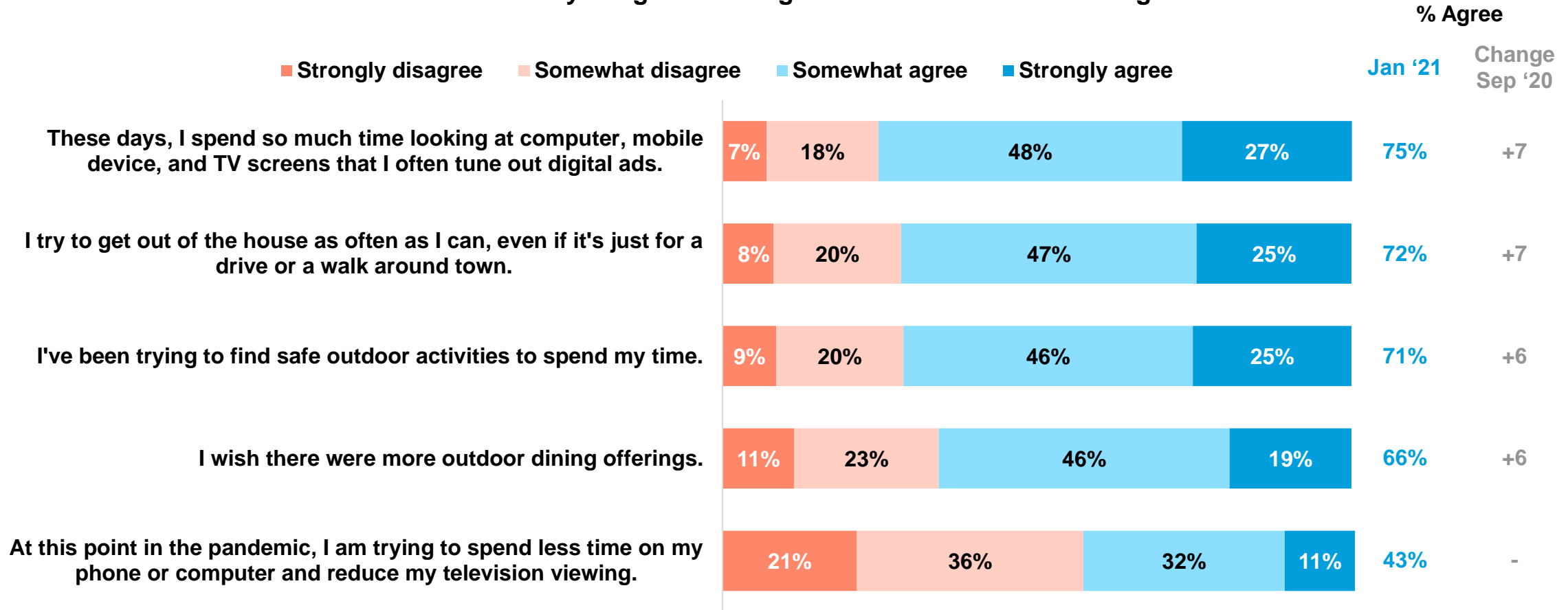
Q12: Would you be interested in special sales or deals available through these types of technologies?

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# 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?



BASE: GENERAL PUBLIC (1000)

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

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# Gen Z Want More Outdoor Dining; Millennials to Simply Get Outside

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

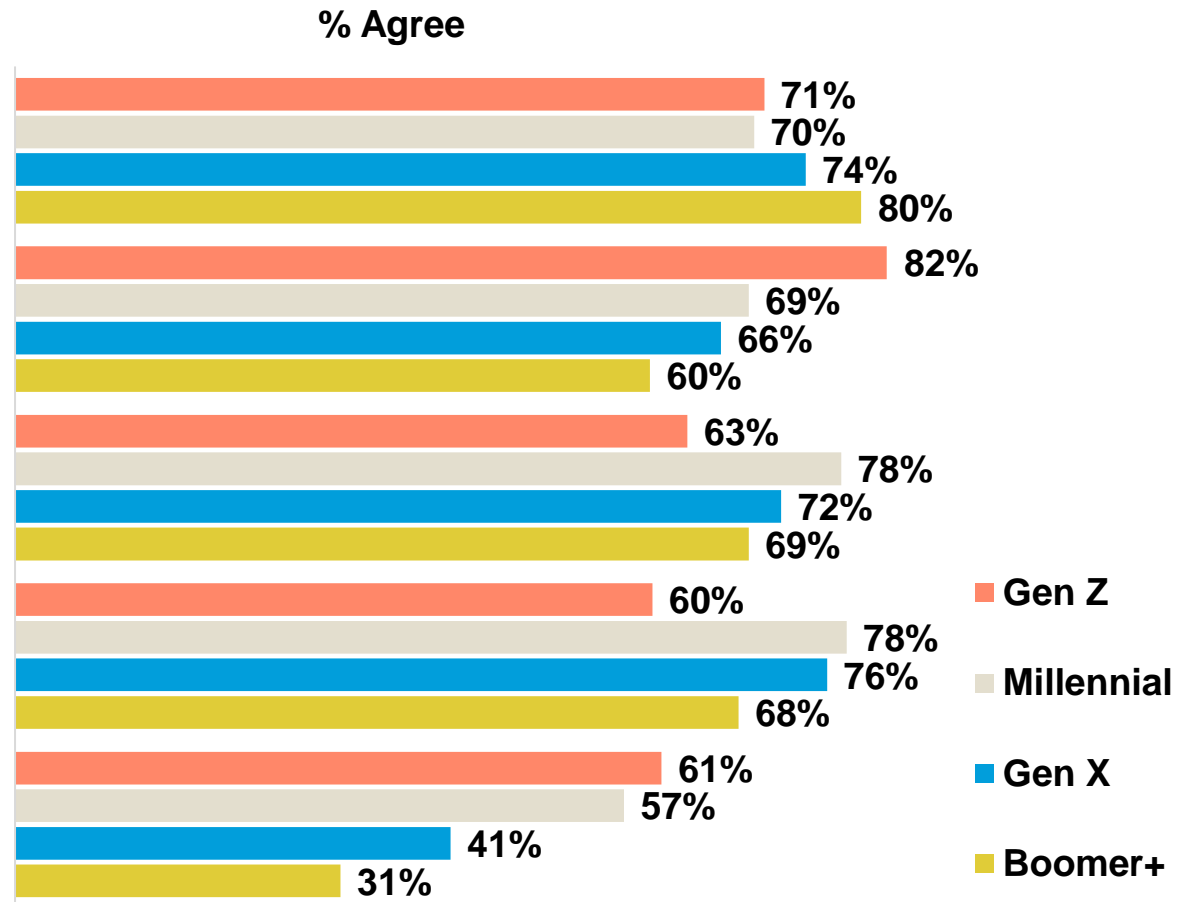
These days, I spend so much time looking at computer, mobile device, and TV screens that I often tune out digital ads.

I wish there were more outdoor dining offerings.

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.

I've been trying to find safe outdoor activities to spend my time.

At this point in the pandemic, I am trying to spend less time on my phone or computer and reduce my television viewing.



BASE: GENERAL PUBLIC (1000)

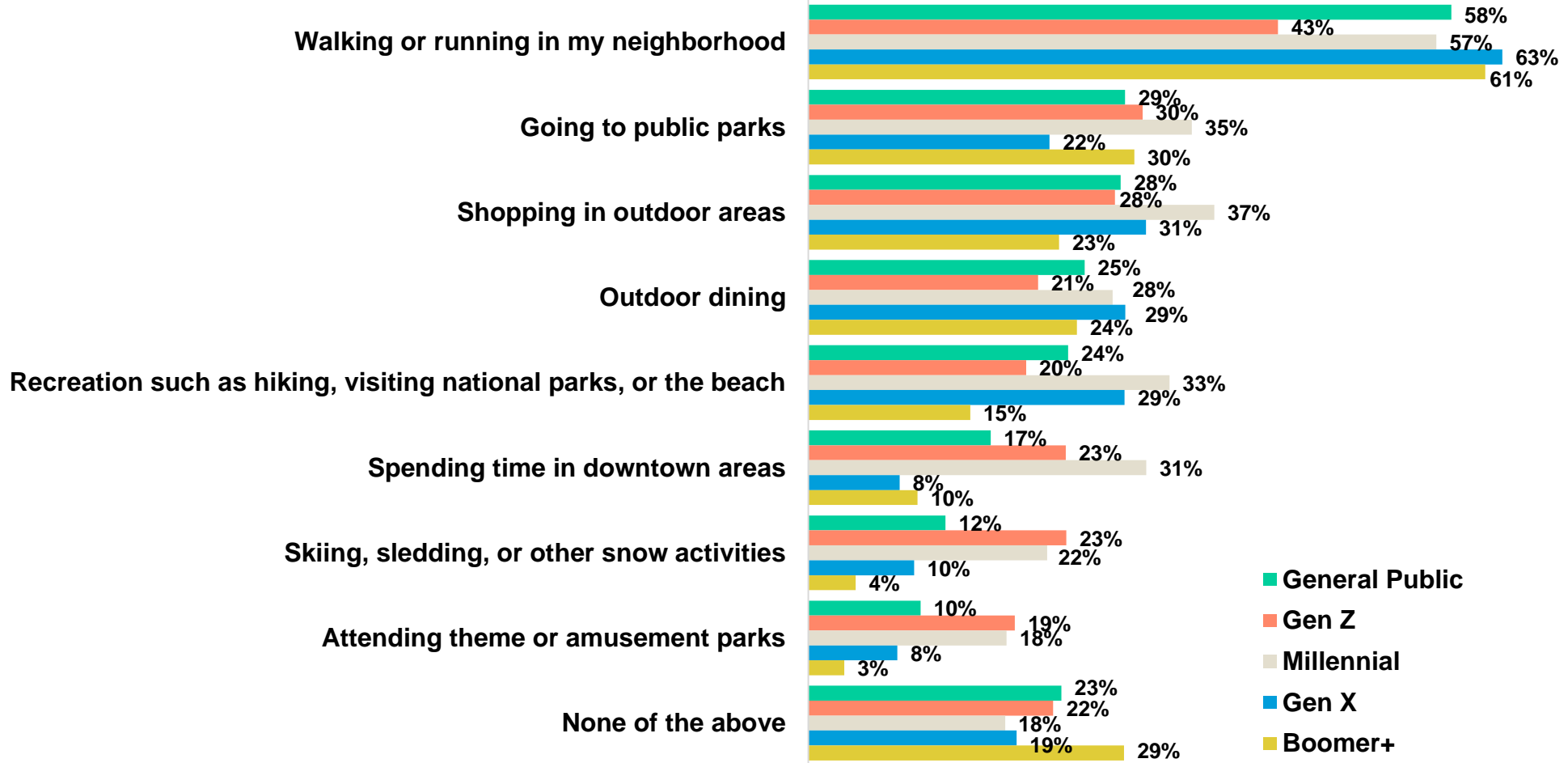
Q10. How much do you agree or disagree with each of the following statements?

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# 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?



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.

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# 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 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.



# The Harris Poll

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Out of Home Advertising Association of America