

2021 Holiday Shopping and Travel: Consumer Intent and OOH Impact

October 2021



Out of Home Advertising Association of America



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Executive Summary

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Executive Summary

Holiday Travel

- 79% of adult consumers plan to travel for the upcoming holiday season (November and/or December).
- Personal vehicles (78%) will be the most used mode of transport, while 42% of travelers will fly.
- 43% will travel a longer distance this year as opposed to last year, and high-income earners and major city residents will travel the longest distances.
- 75% will travel at least 100 miles roundtrip during the holidays, and 50% will travel at least 400 miles roundtrip.
- 40% will travel for an extended stay with family or friends, 36% will take a weekend getaway trip, and 25% will take a vacation to a resort, beach or elsewhere.
- COVID-19 will not have any impact on holiday plans for 28% of consumers. However, 1 in 4 will drive instead of flying, while 1 in 5 are planning more outdoor holiday activities as a result of the pandemic.

Executive Summary

Holiday Shopping

- 58% of shoppers plan to make their holiday purchases earlier than typical. November will generate the largest purchasing among 29% of shoppers. Adults 25-34 will do more shopping in October (30%) than other groups, while minor city residents and lower income earners are more likely to spread their purchasing over several months.
- Compared to 2020, the greatest increases in spending will occur on cooking and meals (31%), personal electronics (31%), holidays (30%), and personal clothes (31%). Females will spend more on cooking and meals, while males will spend more on vacations, electronics, and clothes.
- The most purchased holiday gifts will be clothing (48%), technology products (39%), and toys (29%).
- Over half (55%) will spend more than \$500 on holiday gifts and products this year.
- 40% will increase their spend from last year, and 36% will spend more than 50% of what they spent last year.
- Big Box retail stores are likely to see the greatest increased spending by consumers (46%).

Executive Summary

OOH Advertising

- 70% of consumers are more appreciative of their outdoor surroundings since many COVID-19 restrictions have been lifted. As a result, 53% of consumers are noticing OOH ads now than before the pandemic. Increased appreciation of the outdoors, and awareness of OOH ads were highest among Adults 25-44, high-income earners, and major city residents.
- Advertising messaging on COVID-19 safety & hygiene continues to resonate with 38% reporting these to be among the most useful for recently viewed OOH ads, followed by OOH ads promoting special offers and promotions (31%).
- OOH ads are driving consumers to search for more information about advertisers and their products (25%), to visit advertiser's website (23%), and to share information by word-of-mouth (22%). OOH ads are also driving sales, with 21% stating they made a physical purchase, and 20% noting they downloaded an app after seeing a recent OOH ad.
- 50% of consumers find contextual OOH ads generate a greater level of interest – in particular, among males, Adults 25-44, and high-income earners.
- OOH plays an important role in driving online activation as consumer digital device burnout continues: 71% often tune out digital device ads, 68% are concerned with personal data/security when shopping online, and 47% are trying to decrease phone, computer, or TV usage/viewing.

Research Methodology

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Research Methodology and Objectives

- The OAAA (Out Of Home Advertising Association of America) commissioned this study to understand consumers intent for 2021 holiday shopping and travel, and OOH advertising's influence in these consumer journeys.
- Specifically, to understand:
 - i. Holiday Travel**
 - What are people's travelling plans for the holidays?
 - What modes of transportation will they use?
 - ii. Holiday Shopping**
 - How are consumers approaching holiday shopping season?
 - How much do they plan to spend on holiday gifts and products?
 - At which types of stores and on what types of products do they intend to spend the most?
 - iii. OOH Environment & Advertising**
 - How are consumers perceiving the outdoors and OOH advertising?
 - What OOH advertising do consumers find most useful?
 - What actions were taken as a result exposure to OOH advertising?

N=1000

*18 to 65 adults
Weighted to be nationally
representative on age, gender,
and income.*

*Fieldwork period:
September 7th - 17th 2021*

*"Major cities" are defined as
populations of 1 million+*

*"Minor cities" are defined as
populations under 1 million*

Screen & Profile

Holiday Travel:
Modes of transportation,
distance, impact of COVID-19,
type of trip

**Holiday Shopping: What?,
When?, Where?**

**OOH Environment &
Advertising**

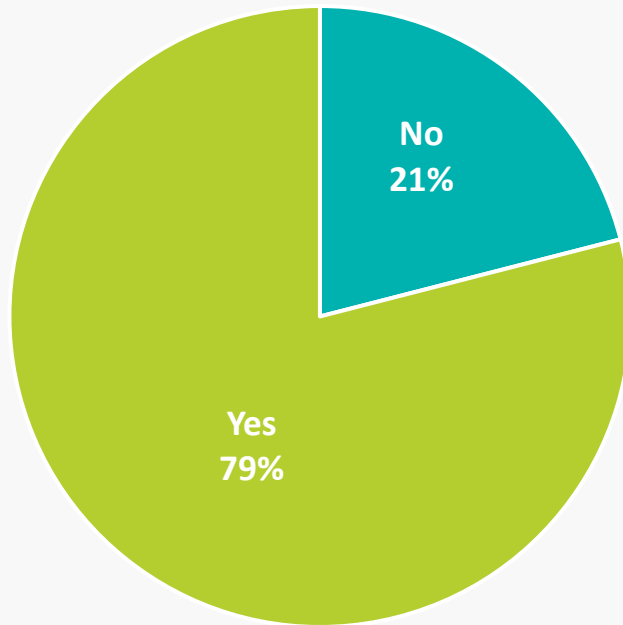
Sample Composition

| | | |
|----------|----------------------------------------------------|-----|
| Gender | Male | 49% |
| | Female | 51% |
| Age | 18-24 | 15% |
| | 25-34 | 22% |
| | 35-44 | 21% |
| | 45-54 | 20% |
| | 55-65 | 23% |
| Income | Less than \$30,000 | 22% |
| | \$30,000 - \$49,999 | 16% |
| | \$50,000 - \$69,999 | 13% |
| | \$70,000 - \$99,999 | 15% |
| | \$100,000 - \$149,999 | 15% |
| | \$150,000 or more | 18% |
| Lives in | Major city (population 1 million or more) | 42% |
| | Minor city (population less than 1 million) | 58% |
| Region | Northeast | 19% |
| | Midwest | 23% |
| | South | 40% |
| | West | 17% |

HOLIDAY TRAVEL

More than 3 in 4 intend to travel for the upcoming holiday season

Intention to travel for the upcoming holiday holidays



| Yes | |
|---------------|-------|
| Gender | |
| Male | 86% ▲ |
| Female | 72% |
| Age | |
| 18-24 | 83% |
| 25-34 | 89% |
| 35-44 | 85% |
| 45-54 | 72% |
| 55-65 | 65% |

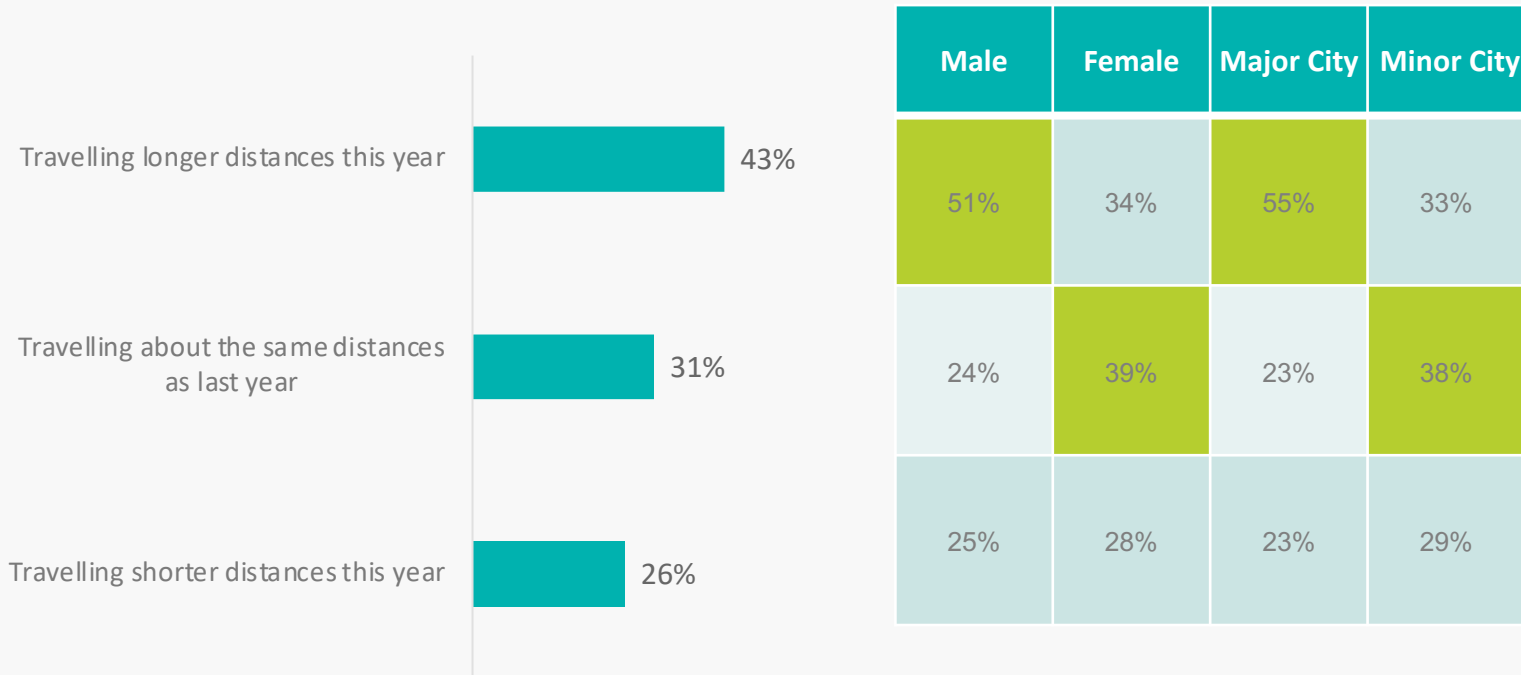
Base (Weighted): Total sample (1000)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

- **Males and Adults 18-44 are the most likely to travel for the upcoming holiday season – more than 80% of each demographic segment**

43% will travel longer distances this year compared to last year – especially males and major city residents

Travelling distances for the holidays this year versus last year



- 1 in 3 will travel about the same distance as last year, and will more likely be Female and from minor cities

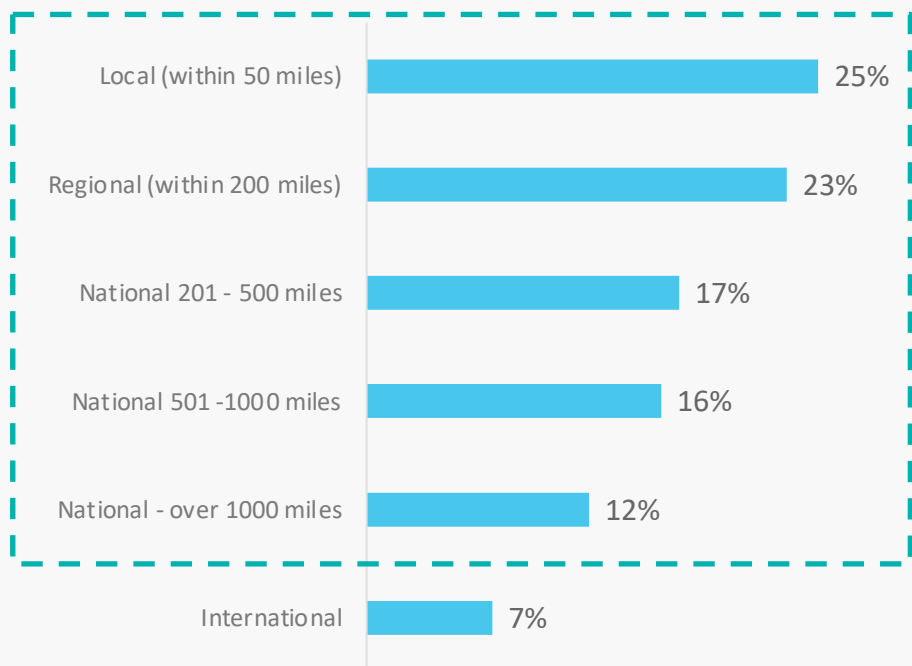
Thinking ahead to the holidays this November and December, do you plan to be traveling shorter or longer distances for the holidays this year versus last year?

Base (Weighted): Those will be travelling for the upcoming holiday season (754)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

93% will travel within the US – males, high-income earners, and major city residents will travel the longest distances to reach their holiday destination

Farthest distance people plan to travel (One-Way)



| Gender | | Income | | | City Size | |
|--------|--------|----------------|---------------------|-------------------|------------|------------|
| Male | Female | Up to \$49,999 | \$50,000 - \$99,999 | \$100,000 or more | Major city | Minor city |
| 21% | 29% | 38% | 23% | 13% | 18% | 30% |
| 19% | 28% | 30% | 27% | 14% | 18% | 27% |
| 19% | 15% | 15% | 20% | 17% | 21% | 14% |
| 17% | 15% | 8% | 15% | 24% | 20% | 13% |
| 15% | 10% | 6% | 8% | 21% | 12% | 12% |
| 10% | 4% | 3% | 6% | 11% | 11% | 3% |

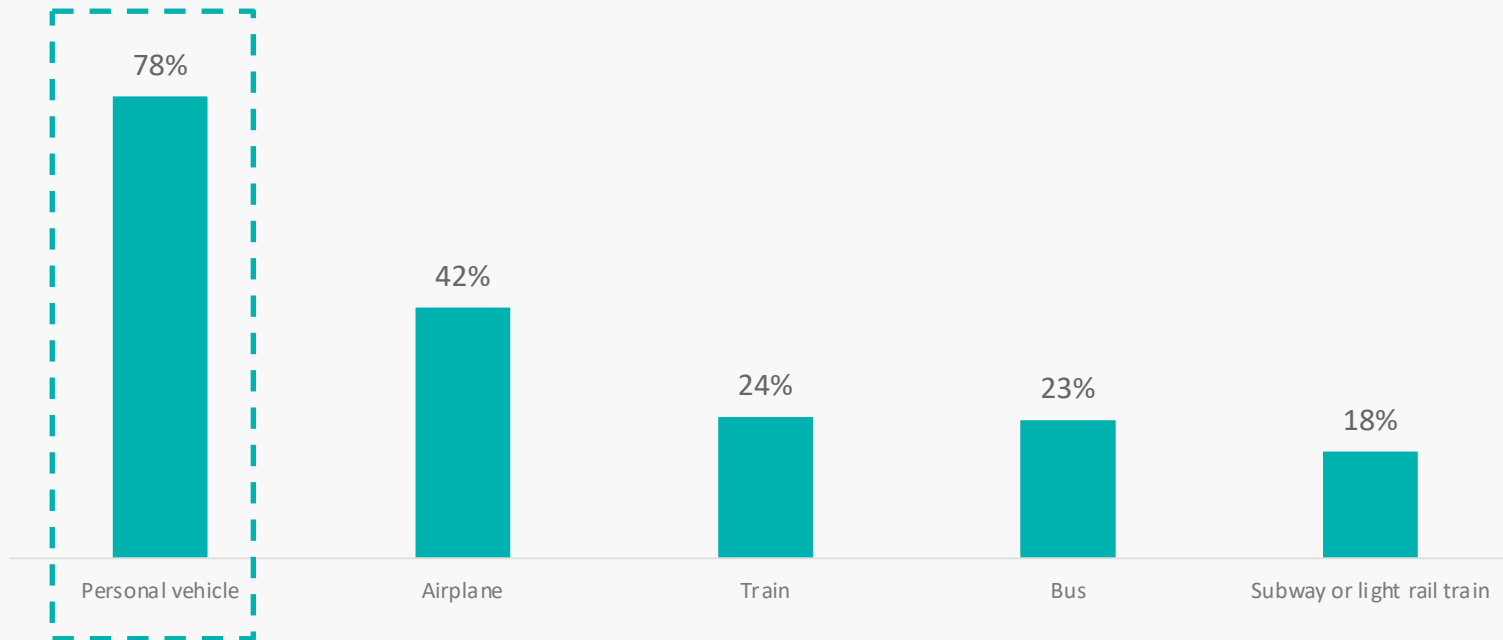
Approximately what is the farthest distance you plan to travel to reach any of your vacation or holiday destinations this November and December (one-way)?

Base (Weighted): Those will be travelling for the upcoming holiday season (785)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

Among travelers, almost 80% will use their personal vehicle to travel for the upcoming holidays

Modes of transportation people intend to take



Thinking ahead to travel for the upcoming holidays which of the following modes of transportation do you intend to take? Please select all that apply

Base (Weighted): Those will be travelling for the upcoming holiday season (785)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

- Airplane is the second most popular mode of transportation (42%), followed by train (24%)

Minor city and Midwest region residents are the most likely to use their personal vehicle. Trains, buses, and subways are mostly popular with major city residents, and Males 24-44

Modes of transportation people intend to take

| | Total | Gender | | Age | | | | | City Size | | Region | | | |
|----------------------------|-------|--------|--------|-------|-------|-------|-------|-------|------------|------------|-----------|---------|-------|------|
| | | Male | Female | 18-24 | 25-35 | 35-44 | 45-54 | 55-56 | Major city | Minor city | Northeast | Midwest | South | West |
| Personal vehicle | 78% | 77% | 79% | 64% | 81% | 78% | 83% | 79% | 73% | 82% | 76% | 86% | 80% | 64% |
| Airplane | 42% | 50% | 33% | 43% | 50% | 53% | 37% | 24% | 55% | 31% | 43% | 48% | 38% | 45% |
| Train | 24% | 34% | 12% | 21% | 35% | 33% | 13% | 10% | 37% | 12% | 31% | 29% | 15% | 27% |
| Bus | 23% | 33% | 12% | 21% | 35% | 33% | 11% | 8% | 39% | 10% | 29% | 32% | 13% | 28% |
| Subway or light rail train | 18% | 28% | 7% | 9% | 32% | 30% | 6% | 3% | 32% | 6% | 24% | 28% | 10% | 16% |

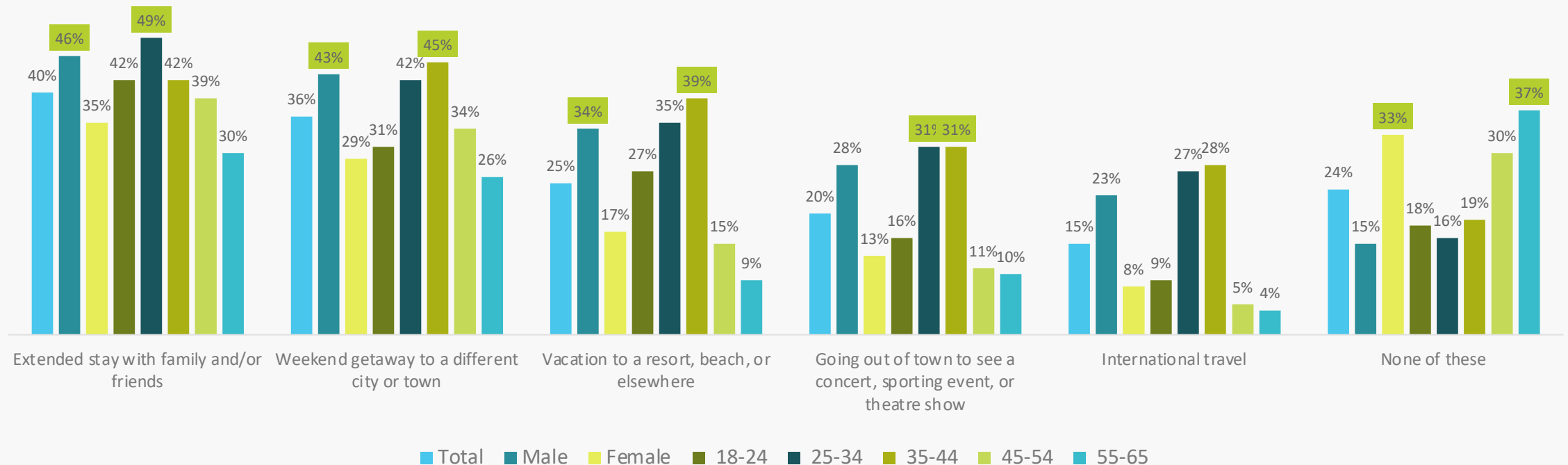
Thinking ahead to travel for the upcoming holidays which of the following modes of transportation do you intend to take? Please select all that apply

Base (Weighted): Those will be travelling for the upcoming holiday season (785)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

40% will go for an extended stay with family or friends, 36% will take a weekend getaway trip, and 25% will take a vacation to a resort, beach or elsewhere

Trips likely to take this November and December to celebrate various holidays



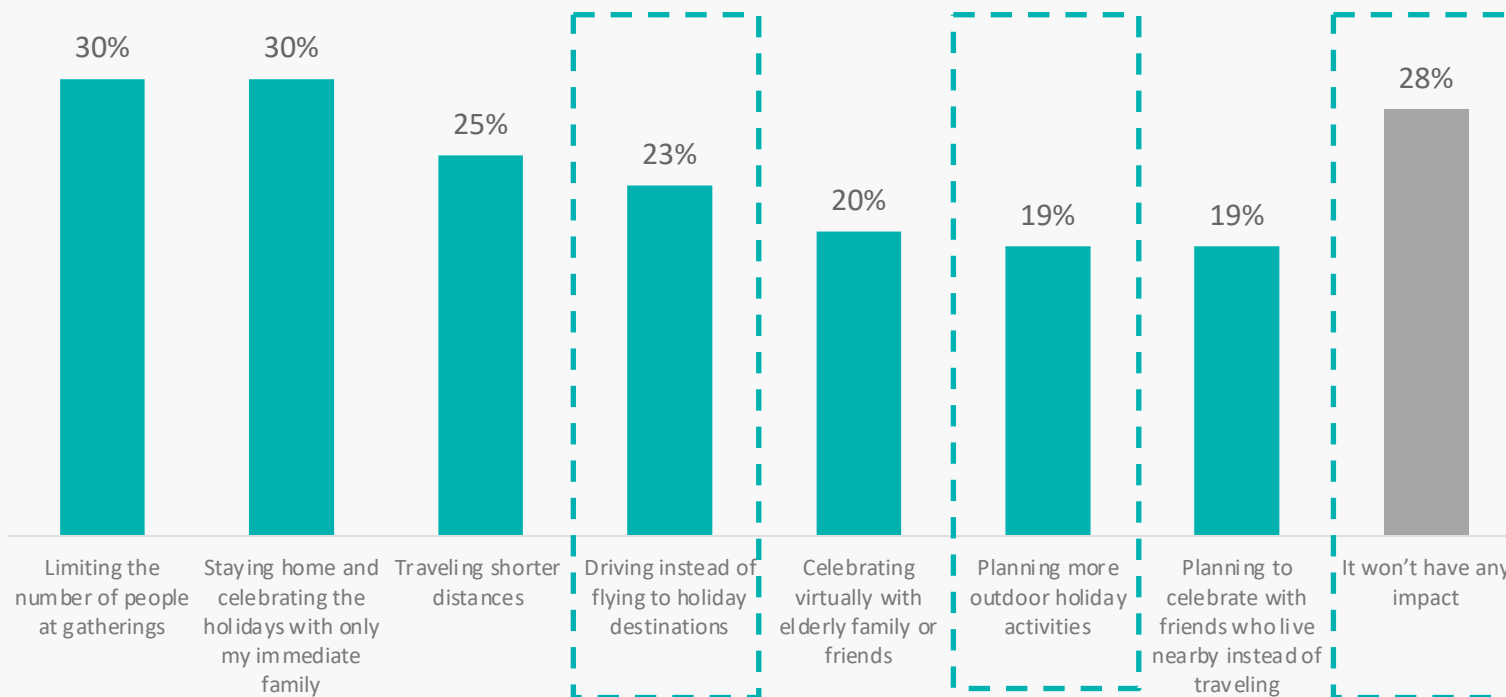
Thinking ahead, which of the following kinds of trips are you likely to take this November and December as you celebrate various holidays? Please select all that apply

Base (Weighted): Total sample (1000), Male (485), Female (515), 18-24 (146), 25-34 (225), 35-44 (206), 45-54 (197), 55-65 (226)



COVID-19 Impact: 25% will drive instead of flying to holiday destinations, while 20% are planning more outdoor holiday activities

Impact of COVID-19 on upcoming holiday season plans



Will the COVID-19 pandemic and the delta variant impact your upcoming holiday season plans in any of the following ways? Please select all that apply

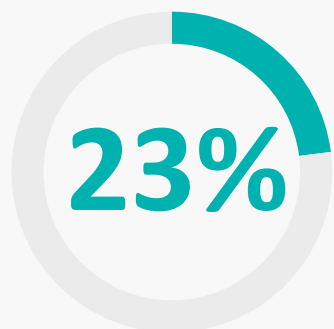
Base (Weighted): Total sample (1000)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

- For 28%, the pandemic will not have any impact on upcoming holiday plans

Males, adults 25-44, and major city residents are the most likely to drive instead of fly

Driving instead of flying to holiday destinations



| Driving instead of flying to holiday destinations | | |
|---------------------------------------------------|--|-----|
| Gender | | |
| Male | | 29% |
| Female | | 18% |
| Age | | |
| 18-24 | | 21% |
| 25-34 | | 31% |
| 35-44 | | 30% |
| 45-54 | | 21% |
| 55-65 | | 13% |
| Income | | |
| Up to \$49,999 | | 27% |
| \$50,000 - \$99,999 | | 15% |
| \$100,000 or more | | 22% |
| City Size | | |
| Major city | | 32% |
| Minor city | | 17% |
| Region | | |
| Northeast | | 26% |
| Midwest | | 27% |
| South | | 19% |
| West | | 25% |

Will the COVID-19 pandemic and the delta variant impact your upcoming holiday season plans in any of the following ways? Please select all that apply

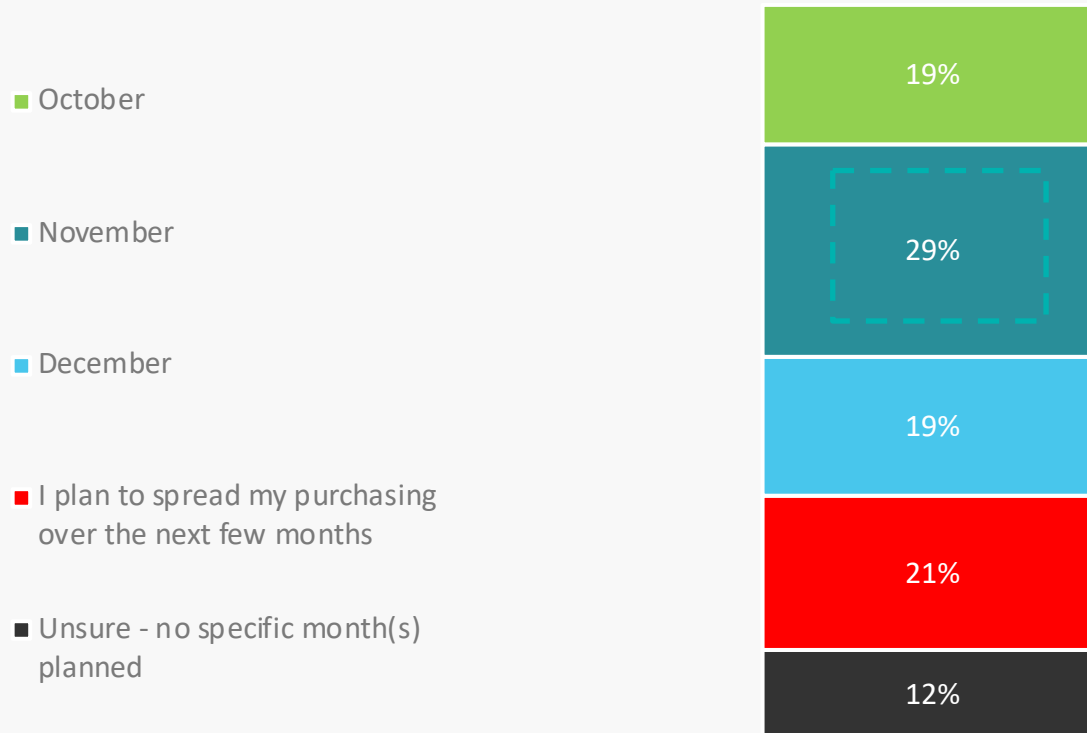
Base (Weighted): Total sample (1000), Male (485), Female (515), 18-24 (146), 25-34 (225), 35-44 (206), 45-54 (197), 55-65 (226), Up to \$49,999 (378), \$50,000-\$99,999 (287), \$100,000 or more (336), Major city (423), Minor city (577), Northeast (190), Midwest (233), South (403), West (174)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

HOLIDAY SHOPPING

November is the primary month for holiday shopping

When doing majority of holiday gift shopping



Thinking specifically about holiday gift shopping you intend to do this season, when do you plan to make the majority of your purchases?

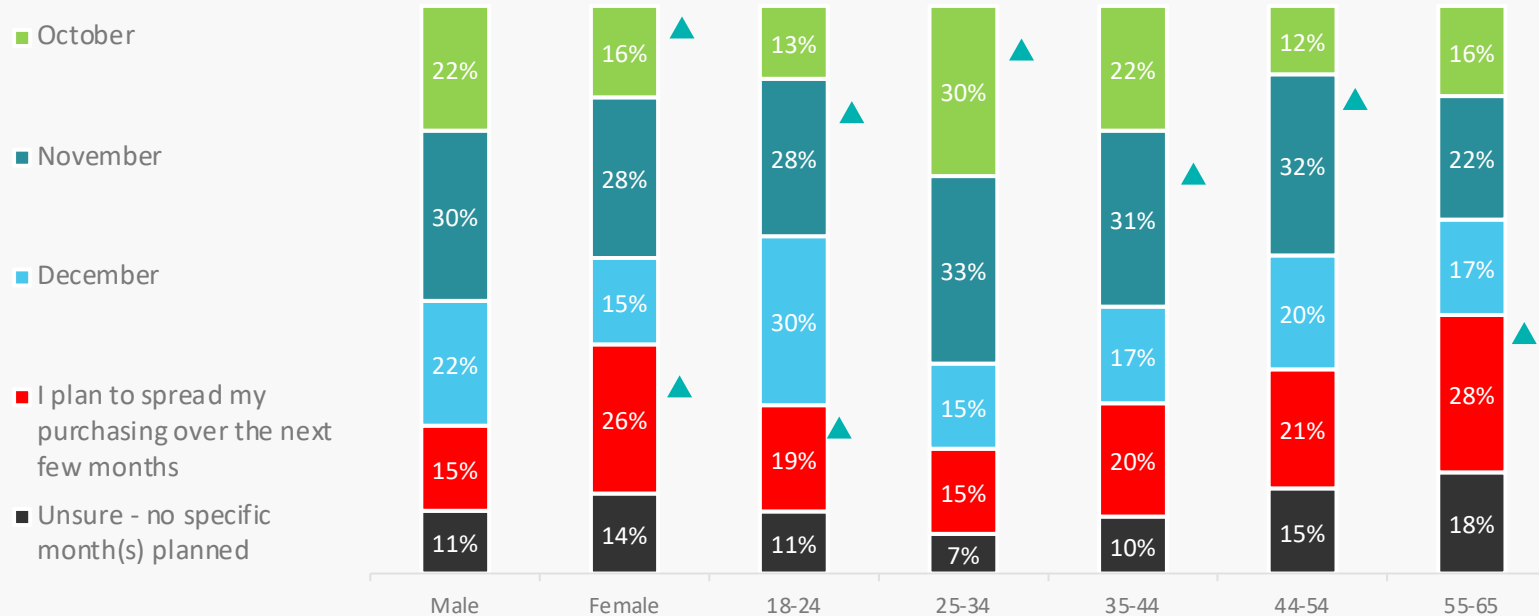
Base (Weighted): Total sample (1000)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

- 29% plan to do the majority of their holiday shopping during the month of November
- 21% will spread their purchasing over the next few months

Interesting nuances in the planning of holiday shopping seen

When doing majority of holiday gift shopping



- Females and Adults 55-65 are more likely to spread their spending over the months
- Adults 25-34 are the most likely to make their purchases in October
- Adults 35-54 are planning the majority of holiday gift shopping for the month of November

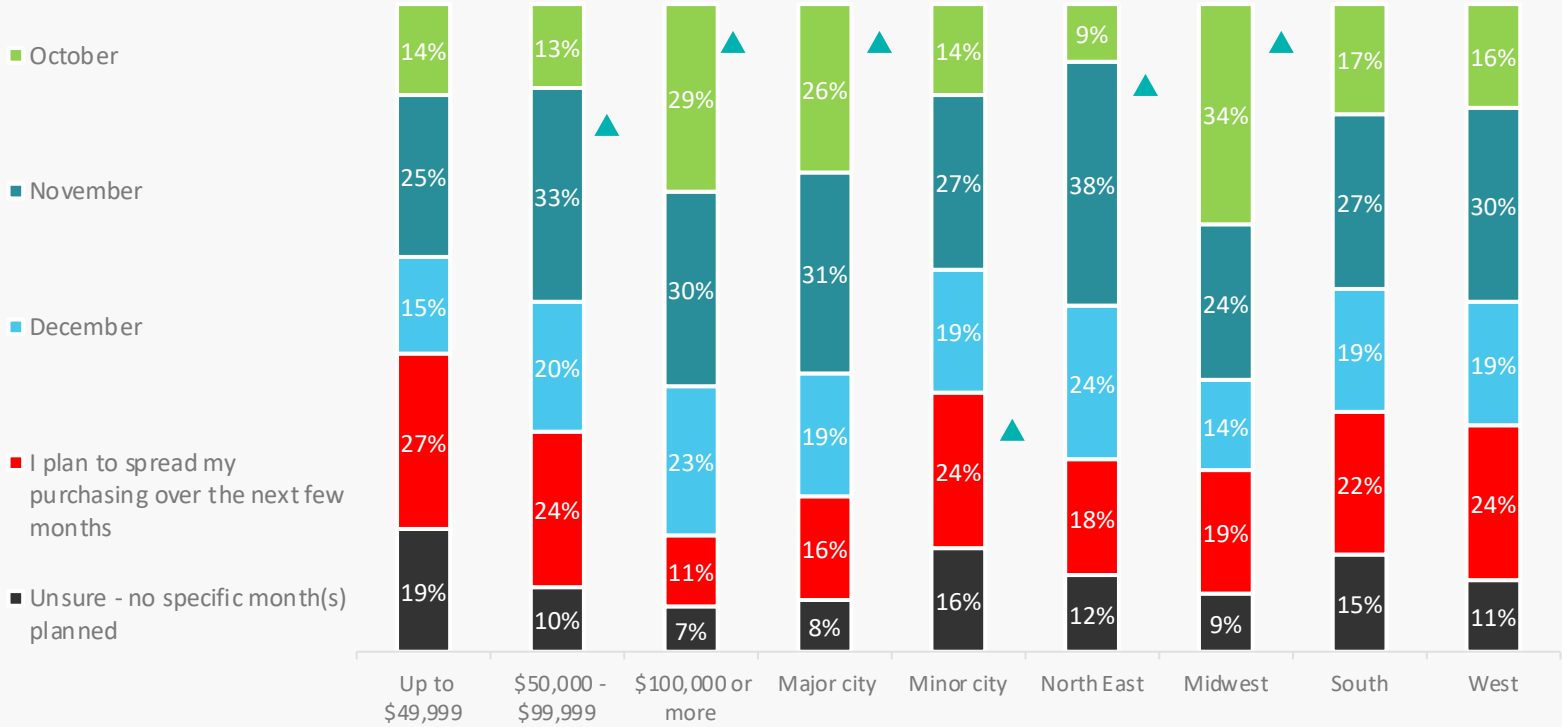
Thinking specifically about holiday gift shopping you intend to do this season, when do you plan to make the majority of your purchases?

Base (Weighted): Total sample (1000), Male (485), Female (515), 18-24 (146), 25-34 (225), 35-44 (206), 45-54 (197), 55-65 (226)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

High-income earners, major city residents, and the Midwest region are more likely to do their shopping in October

When doing majority of holiday gift shopping



- Those earning less than \$100k, living in the West region, and minor city residents are more likely to spread their purchasing over the next few months

Thinking specifically about holiday gift shopping you intend to do this season, when do you plan to make the majority of your purchases?

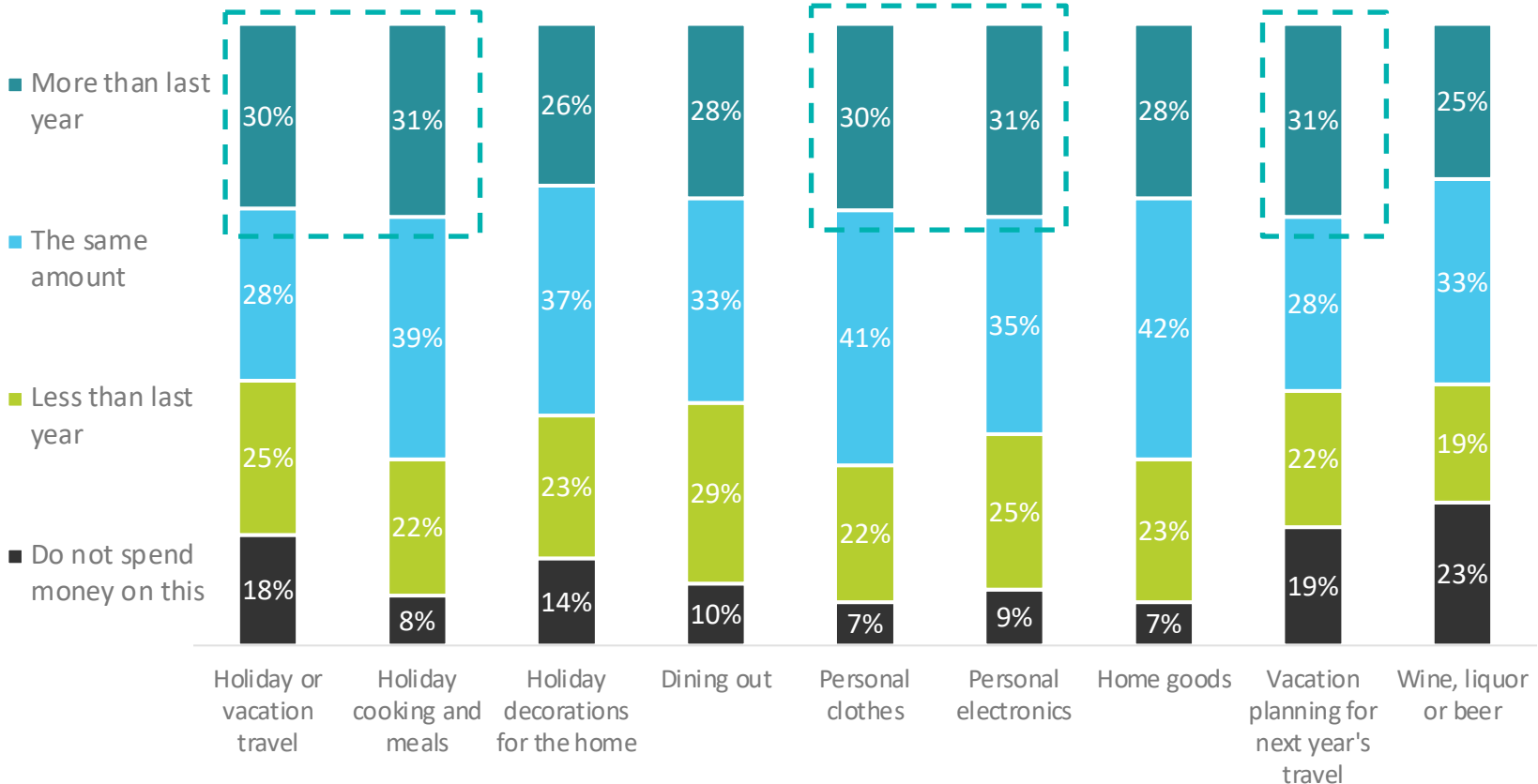
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▲ ▼ Significantly higher/lower. Tested at 95% confidence interval



Consumers will spend more money on vacations, food, clothes, and electronics as compared to last year

Holiday Shopping: Intention to spend as compared to last year



Compared to last year, consumers will mostly spend more money on:

- 31% Holiday cooking/meals
- 31% Personal electronics
- 31% Vacations for 2022
- 30% Holiday vacations 2021
- 30% Clothing

Looking ahead to the holiday shopping season, how much do you plan on spending this year compared to the same timeframe last year across the following areas?

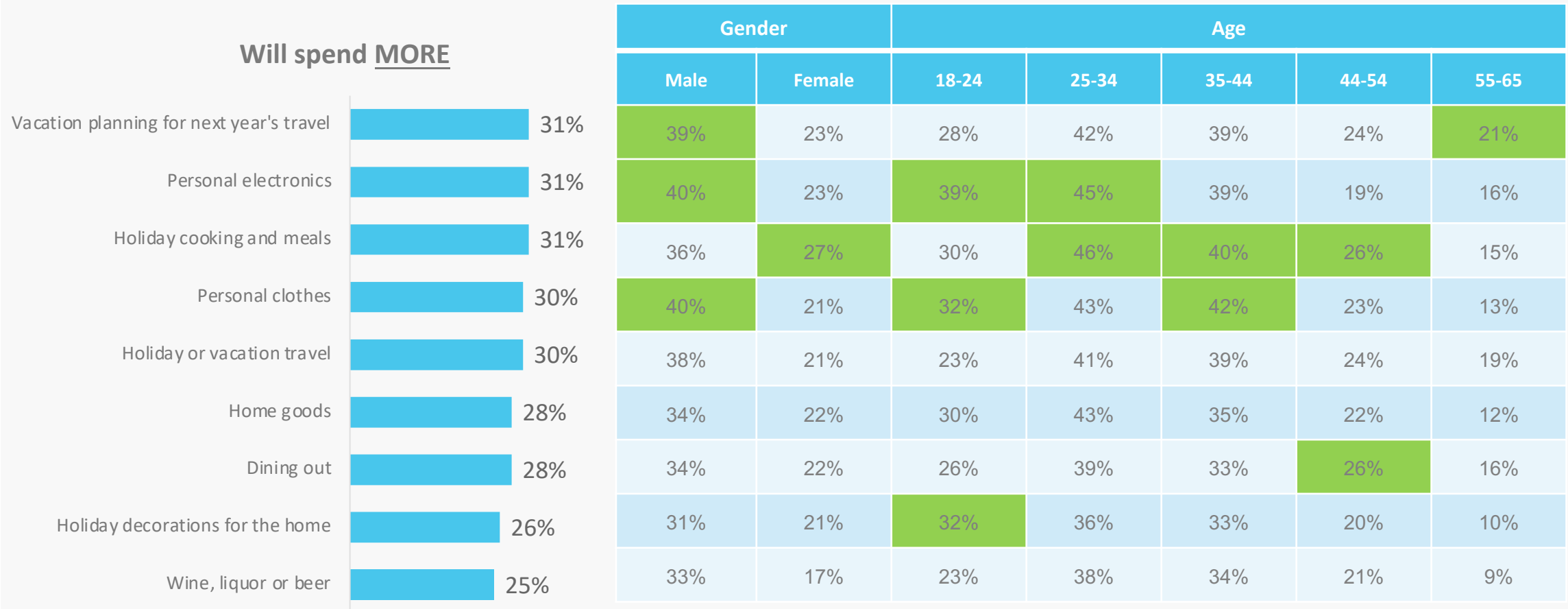
Base (Weighted): Total sample (1000)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval



Largest planned spending increases: Females – holiday cooking and meals; Males - vacation planning, personal electronics, and clothes; and Adults 55-65 - vacation planning for next year

Holiday Shopping: Intention to spend as compared to last year (More than last year)

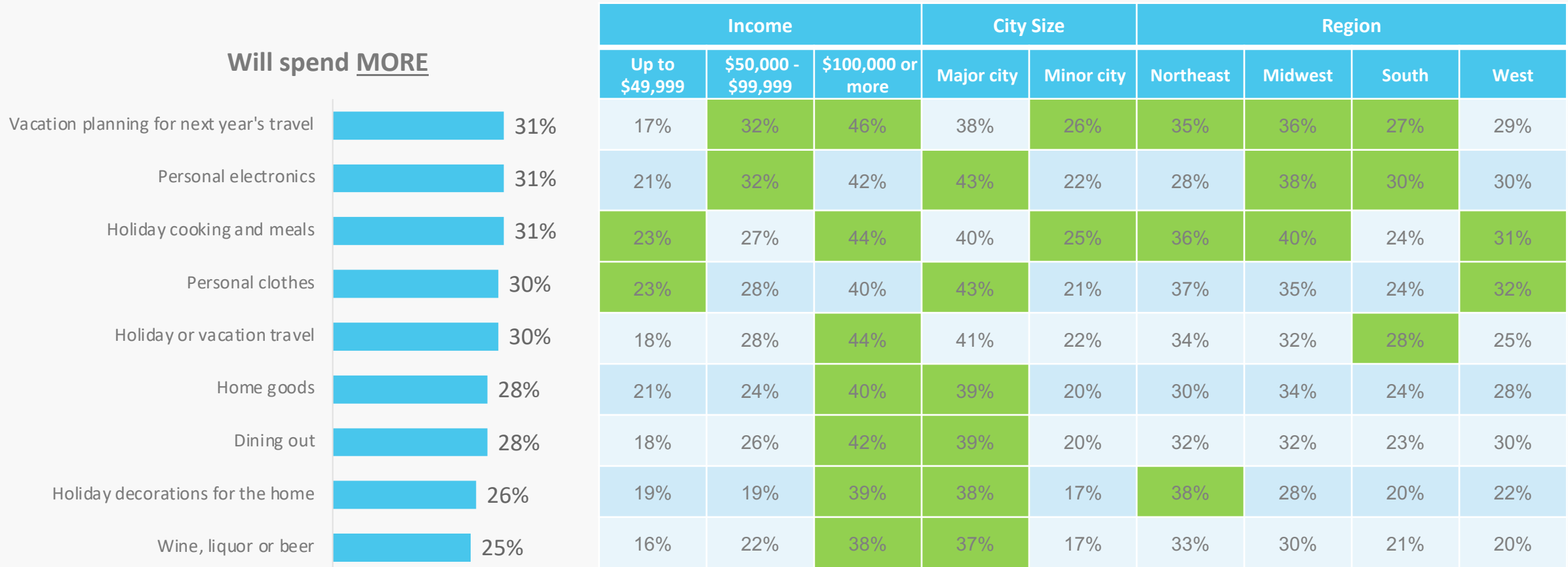


Looking ahead to the holiday shopping season, how much do you plan on spending this year compared to the same timeframe last year across the following areas?

Base (Weighted): Total sample (1000), Male (485), Female (515), 18-24 (146), 25-34 (225), 35-44 (206), 45-54 (197), 55-65 (226)

Largest planned spending increases: Minor city residents – holiday cooking and meals, vacation planning; Major city residents - personal electronics and clothes

Holiday Shopping: Intention to spend as compared to last year (More than last year)

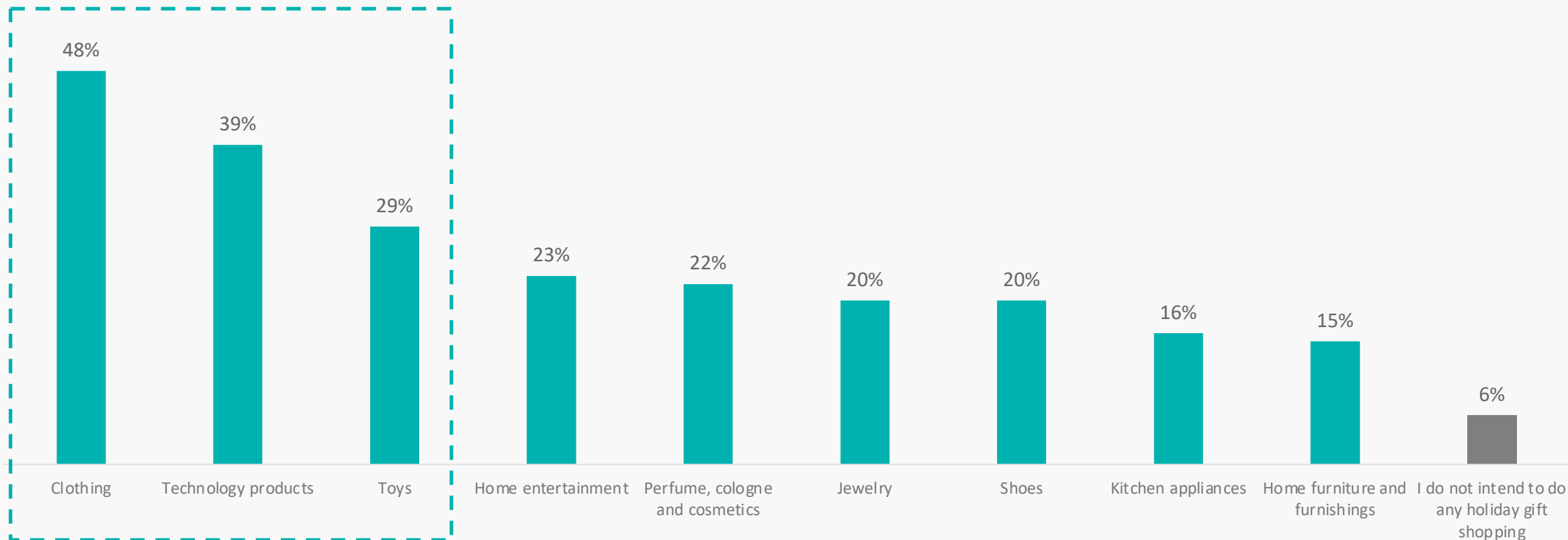


Looking ahead to the holiday shopping season, how much do you plan on spending this year compared to the same timeframe last year across the following areas?

Base (Weighted): Total sample (1000) Up to \$49,999 (378), \$50,000-\$99,999 (287), \$100,000 or more (336), Major city (423), Minor city (577), Northeast (190), Midwest (233), South (403), West (174)

Clothing (48%), technology products (39%), and toys (29%) will be the most purchased holiday gifts

Planning spend most on ... (Top 3)

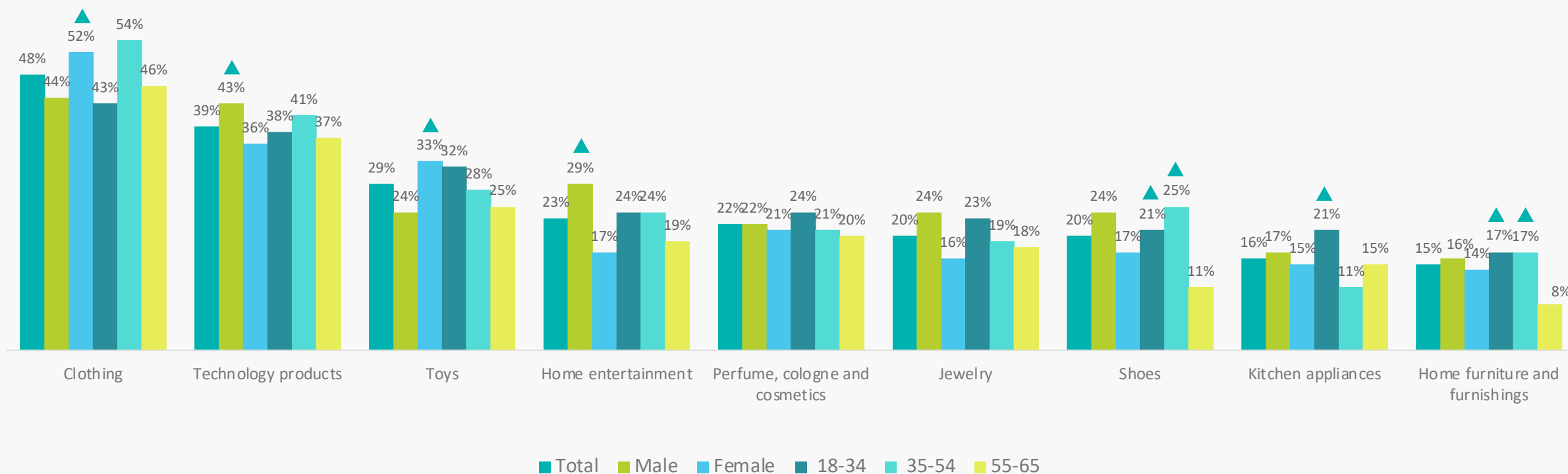


When doing your holiday gift shopping, on what items do you plan to spend the most? Please select up to 3 reply options

Base (Weighted): Total sample (1000)

Clothing and toys purchases will occur more among Females, while technology products and home entertainment purchases will occur more among Males

Planning spend most on ... (Top 3)

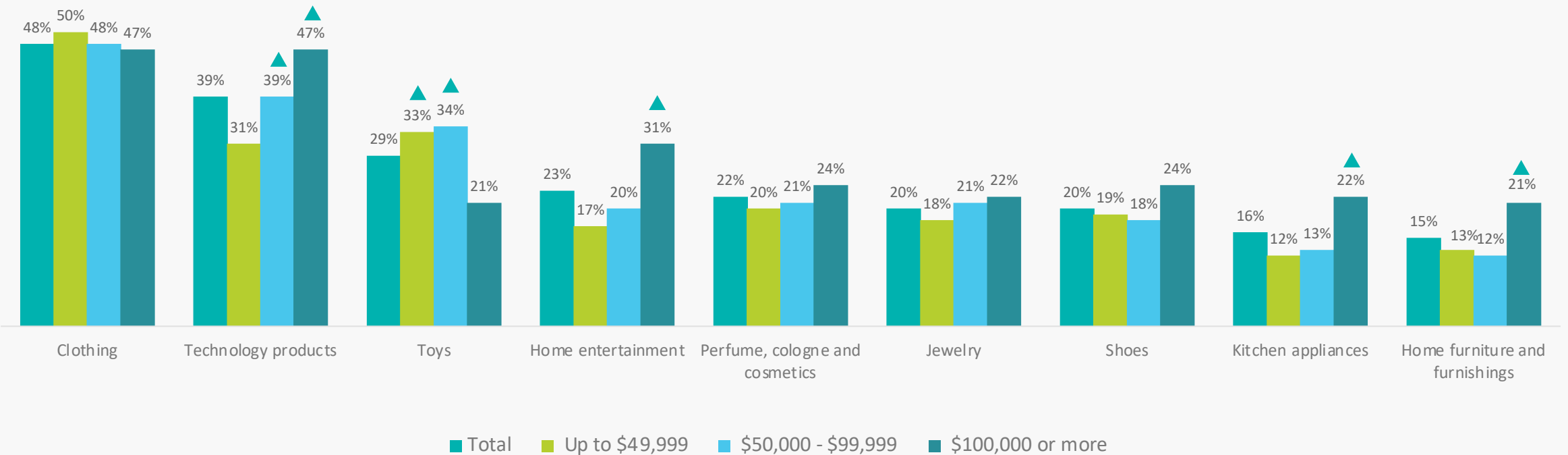


When doing your holiday gift shopping, on what items do you plan to spend the most? Please select up to 3 reply options

Base (Weighted): Total sample (1000), Male (485), Female (515), 18-34 (371), 35-54 (206), 45-54 (403), 55-65 (226)

Toy purchases are more common among middle and lower-income households; Technology and home items purchases are more common among high-income earners

Planning spend most on ... (Top 3)

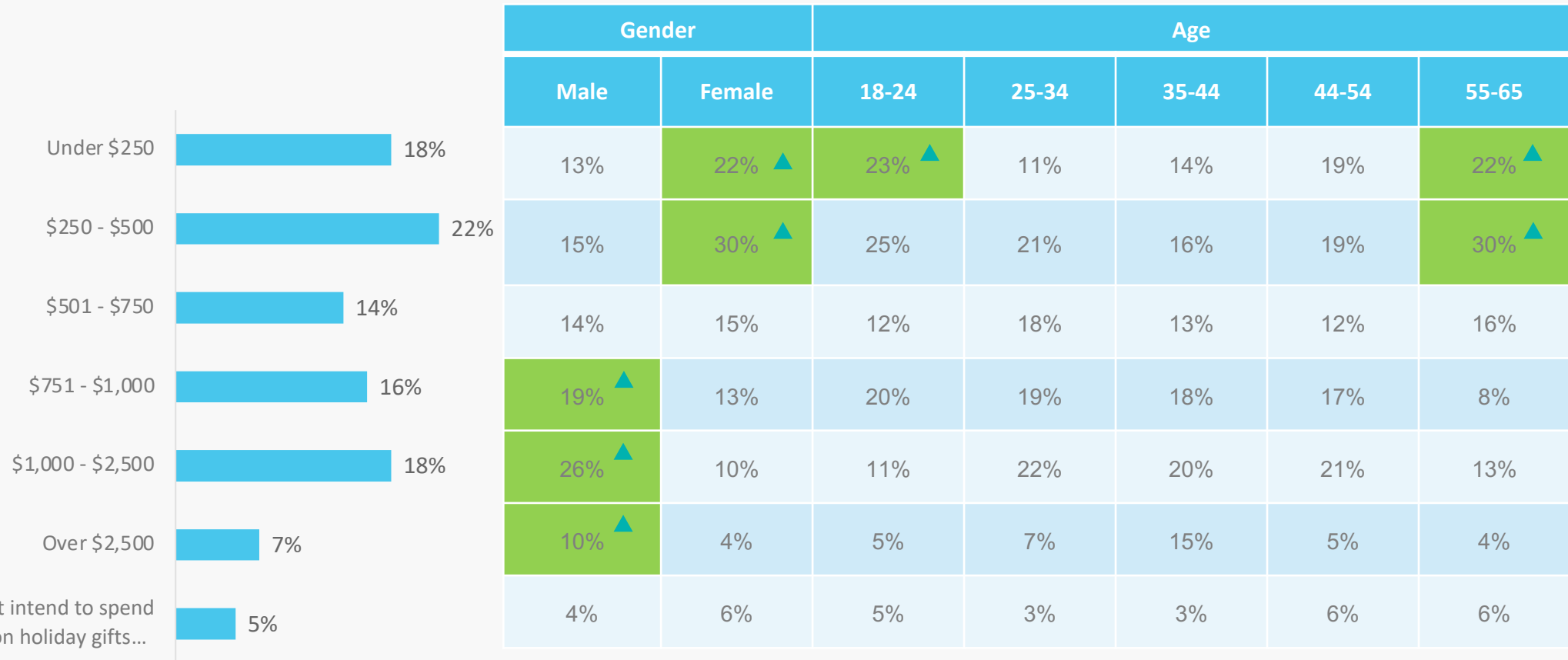


When doing your holiday gift shopping, on what items do you plan to spend the most? Please select up to 3 reply options

Base (Weighted): Up to \$49,999 (378), \$50,000-\$99,999 (287), \$100,000 or more (336)

55% intend to spend over \$500 on holiday gifts and products; Males are projected as top spenders, while 38% of Adults 35-44 will spend \$1K or more

Spend on holiday gifts and products



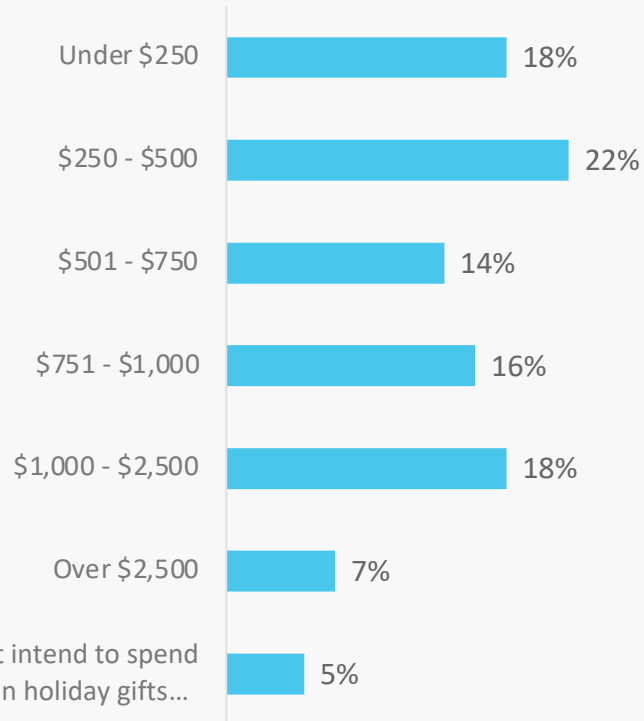
How much do you plan to spend this year on holiday gifts and products?

Base (Weighted): Total sample (1000), Male (485), Female (515), 18-24 (146), 25-34 (225), 35-44 (206), 45-54 (197), 55-65 (226)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

High-income earners, major city residents, and those in the Northeast region will spend the most on holiday gifts and products

Spend on holiday gifts and products



| | Income | | | City Size | | Region | | | |
|--------------------------------------------------------------|----------------|---------------------|-------------------|------------|------------|-----------|---------|-------|-------|
| | Up to \$49,999 | \$50,000 - \$99,999 | \$100,000 or more | Major city | Minor city | Northeast | Midwest | South | West |
| Under \$250 | 30% ▲ | 12% | 8% | 14% | 20% ▲ | 10% | 16% | 22% ▲ | 16% |
| \$250 - \$500 | 35% ▲ | 25% | 6% | 17% | 26% ▲ | 24% | 23% | 23% | 19% |
| \$501 - \$750 | 13% | 21% ▲ | 9% | 12% | 16% | 11% | 14% | 15% | 17% |
| \$751 - \$1,000 | 7% | 21% | 21% | 20% ▲ | 13% | 18% | 18% | 13% | 18% |
| \$1,000 - \$2,500 | 6% | 15% | 34% ▲ | 24% ▲ | 13% | 17% | 20% | 19% | 12% |
| Over \$2,500 | 1% | 2% | 19% ▲ | 10% ▲ | 6% | 14% ▲ | 5% | 4% | 11% ▲ |
| N/A – I do not intend to spend any money on holiday gifts... | 7% ▲ | 4% | 3% | 3% | 6% | 6% | 3% | 3% | 8% |

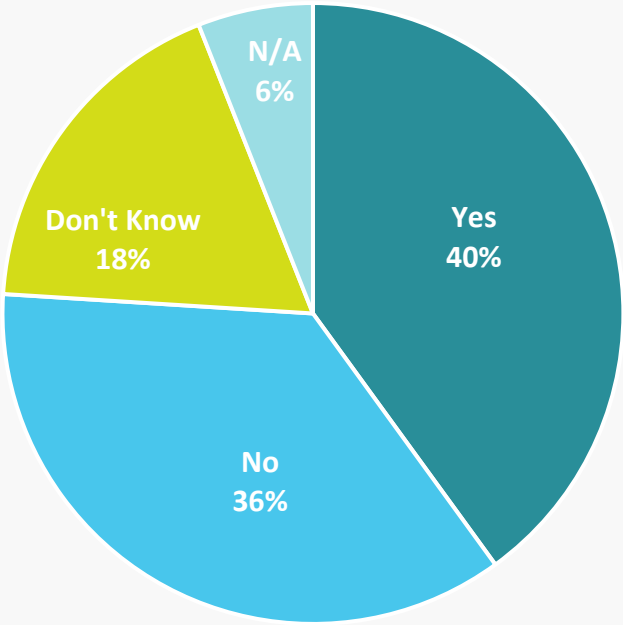
How much do you plan to spend this year on holiday gifts and products?

Base (Weighted): Total sample (1000) Up to \$49,999 (378), \$50,000-\$99,999 (287), \$100,000 or more (336), Major city (423), Minor city (577), Northeast (190), Midwest (233), South (403), West (174)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

40% will spend more on holiday gifts and products than last year

Planning to spend more on holiday gifts and products



| Will spend more than last year | | |
|--------------------------------|--|-----|
| Gender | | |
| Male | | 51% |
| Female | | 30% |
| Age | | |
| 18-24 | | 39% |
| 25-34 | | 61% |
| 35-44 | | 56% |
| 45-54 | | 27% |
| 55-65 | | 17% |
| Income | | |
| Up to \$49,999 | | 27% |
| \$50,000 - \$99,999 | | 36% |
| \$100,000 or more | | 58% |
| City Size | | |
| Major city | | 57% |
| Minor city | | 28% |
| Region | | |
| Northeast | | 39% |
| Midwest | | 49% |
| South | | 35% |
| West | | 41% |

- More than half of Males, Adults 25-44, high-income earners, and major city residents will spend more on holiday gifts and products compared to last year

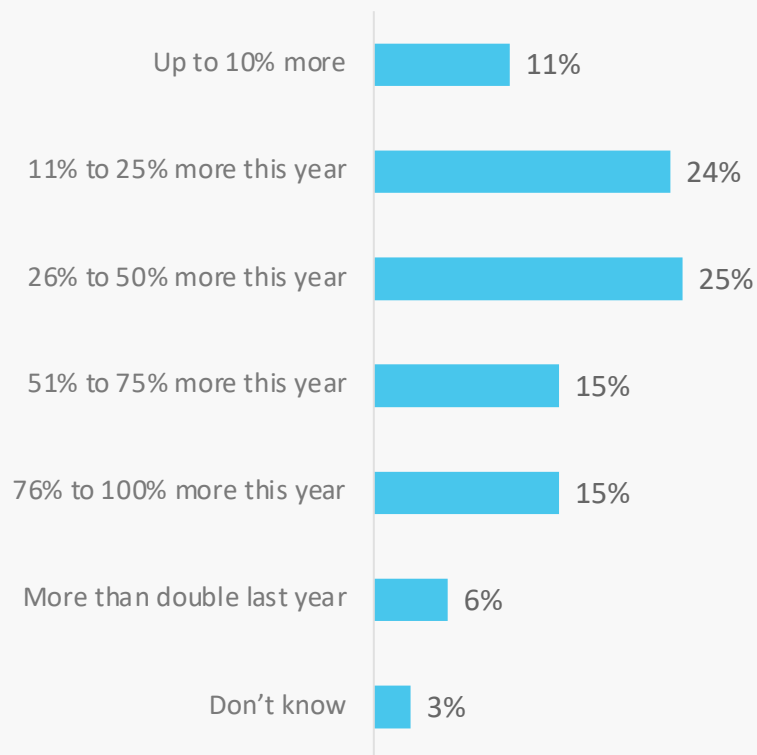
Do you plan to spend more on holiday gifts and products this year versus last?
 Base (Weighted): Total sample (1000), Male (485), Female (515), 18-24 (146), 25-34 (225), 35-44 (206), 45-54 (197), 55-65 (226), Up to \$49,999 (378), \$50,000-\$99,999 (287), \$100,000 or more (336), Major city (423), Minor city (577), Northeast (190), Midwest (233), South (403), West (174)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval



Among those spending more, 61% will spend at least 26% more; 57% of high-income earners will spend at least 50% more

Amount planned to spend more than last year



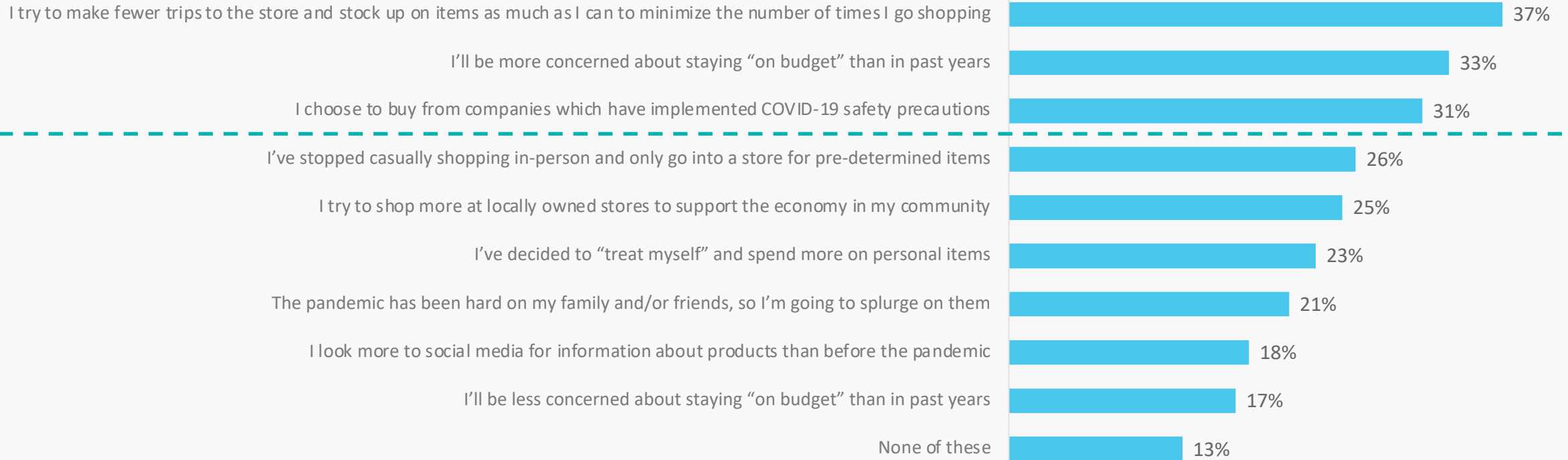
| Age | | | | | Income | | |
|-------|-------|-------|-------|-------|----------------|---------------------|-------------------|
| 18-24 | 25-34 | 35-44 | 44-54 | 55-65 | Up to \$49,999 | \$50,000 - \$99,999 | \$100,000 or more |
| 8% | 9% | 7% | 17% ▲ | 32% | 26% ▲ | 4% | 8% |
| 27% | 20% | 22% | 31% | 24% | 29% | 36% | 14% |
| 29% | 23% | 27% | 20% | 24% | 26% | 33% | 20% |
| 9% | 12% | 23% ▲ | 17% | 5% | 8% | 8% | 22% ▲ |
| 16% | 27% ▲ | 10% | 8% | 0% | 4% | 8% | 26% ▲ |
| 3% | 7% | 8% | 5% | 5% | 4% | 4% | 9% |
| 7% | 0% | 3% | 2% | 10% | 5% | 7% | 0% |

How much more were you planning on spending?

Base (Weighted): Those who will spend more than last year (399)

About 1 in 3 will choose to buy from companies which have implemented COVID-19 safety precautions

Change in mindset about shopping following Covid19 pandemic



As you think about your upcoming holiday shopping plans, which of the following statements regarding the COVID-19 pandemic would you say apply to how your mindset has changed about shopping? Please select all that apply

Base (Weighted): Those who will spend more than last year (399)

Almost 60% will shop earlier in the season than normal; Consumers prefer shopping malls, big name-brand retailers, and online shopping

Preferred shopping method: Option 1 vs Option 2

| Option 1 | |
|---------------------------------------------------------|-----|
| Traditional shopping mall (all enclosed under 1 roof) | 62% |
| Traditional shopping malls (all enclosed under 1 roof) | 57% |
| Big, name-brand retailers | 59% |
| Online | 59% |
| Complete as much of my shopping as possible in one trip | 57% |
| Start shopping earlier than normal | 58% |

| Option 2 | |
|----------|-------------------------------------------------------------|
| 38% | Stand-alone brick n mortar storefronts (1 store indoor) |
| 43% | Outdoor shopping markets and pop-up retailers (all outdoor) |
| 41% | Local “mom and pop” shop |
| 41% | In-person |
| 43% | Spread out my shopping across spontaneous, multiple trips |
| 42% | Wait to see how the pandemic is as the season approaches |

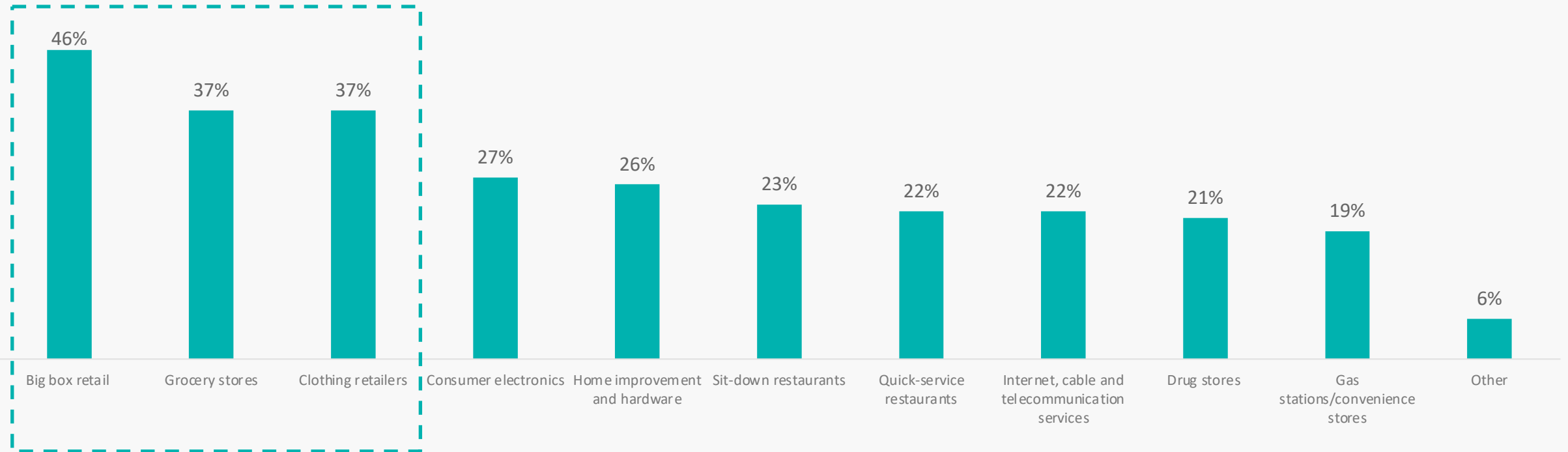
Considering the upcoming holiday shopping season, which of the following would you prefer in shopping, given the ongoing COVID-19 pandemic? For each pair, please select the one that best reflects your opinion

Base (Weighted): Total sample (1000)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

Big box retail is most likely to have the greatest increase in spending, followed by grocery stores and clothing retailers

Type of stores at which consumers intend to spend more than last year

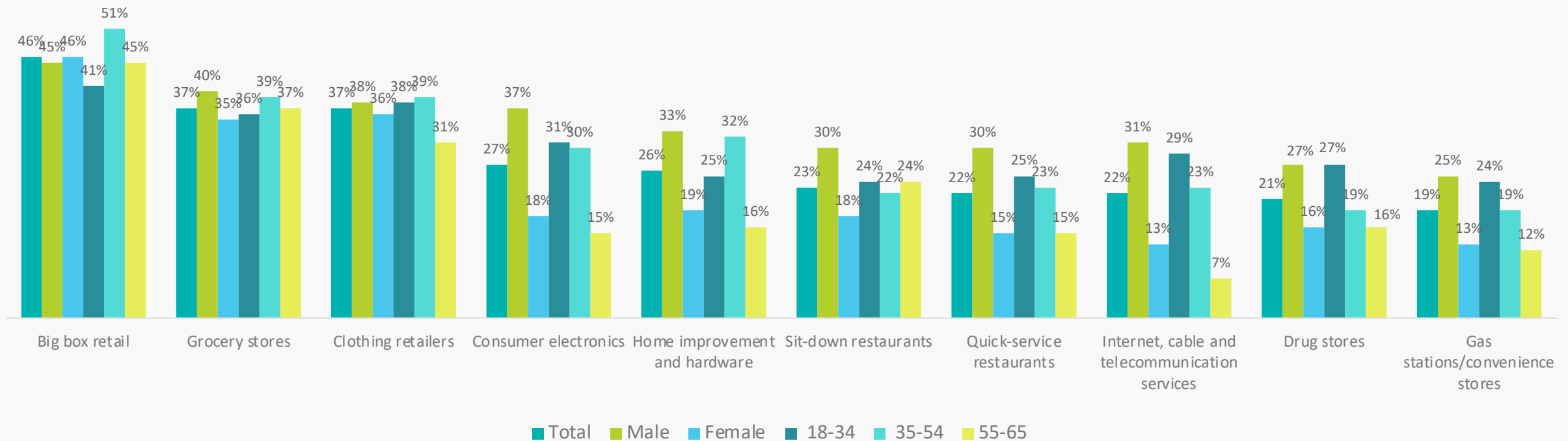


Compared to the last holiday shopping season, at which of the following types of stores do you intend to spend more? Please select all that apply

Base (Weighted): Total sample (1000)

Adults 35-54 intend to spend the most at big box retail stores, while Adults 55-65 will spend more at sit-down restaurants

Type of stores at which consumers intend to spend more than last year

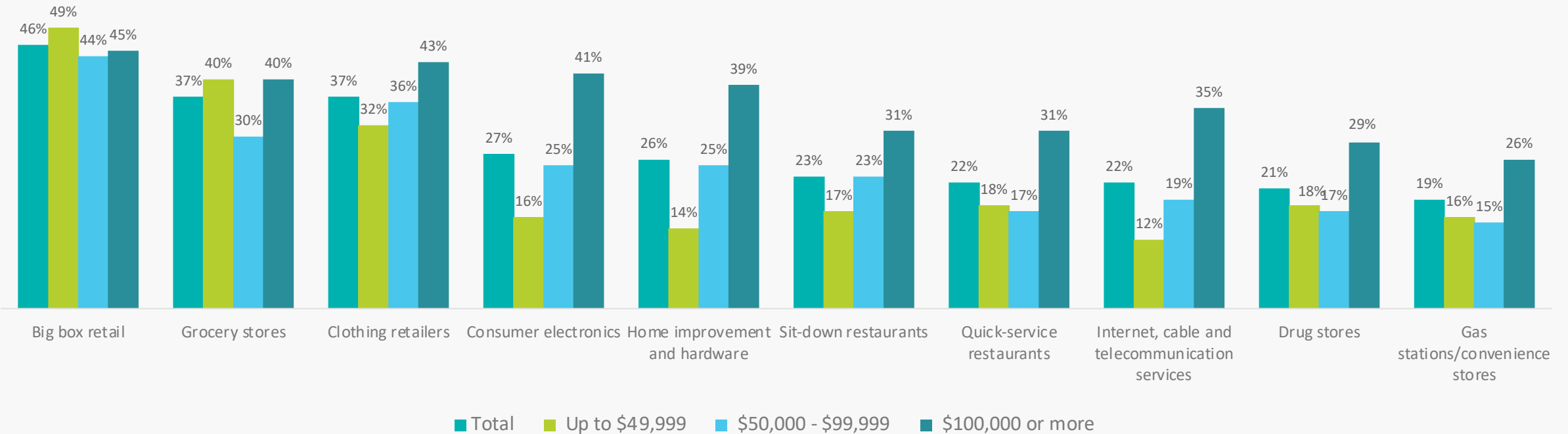


Compared to the last holiday shopping season, at which of the following types of stores do you intend to spend more? Please select all that apply

Base (Weighted): Total sample (1000), Male (485), Female (515), 18-34 (371), 35-54 (403), 55-65 (226)

High-income earners are the most likely to spend more at all types of stores – while big box retailers are appealing to all income levels

Type of stores at which consumers intend to spend more



Compared to the last holiday shopping season, at which of the following types of stores do you intend to spend more? Please select all that apply

Base (Weighted): Up to \$49,999 (378), \$50,000-\$99,999 (287), \$100,000 or more (336)

OOH ENVIRONMENT AND ADVERTISING

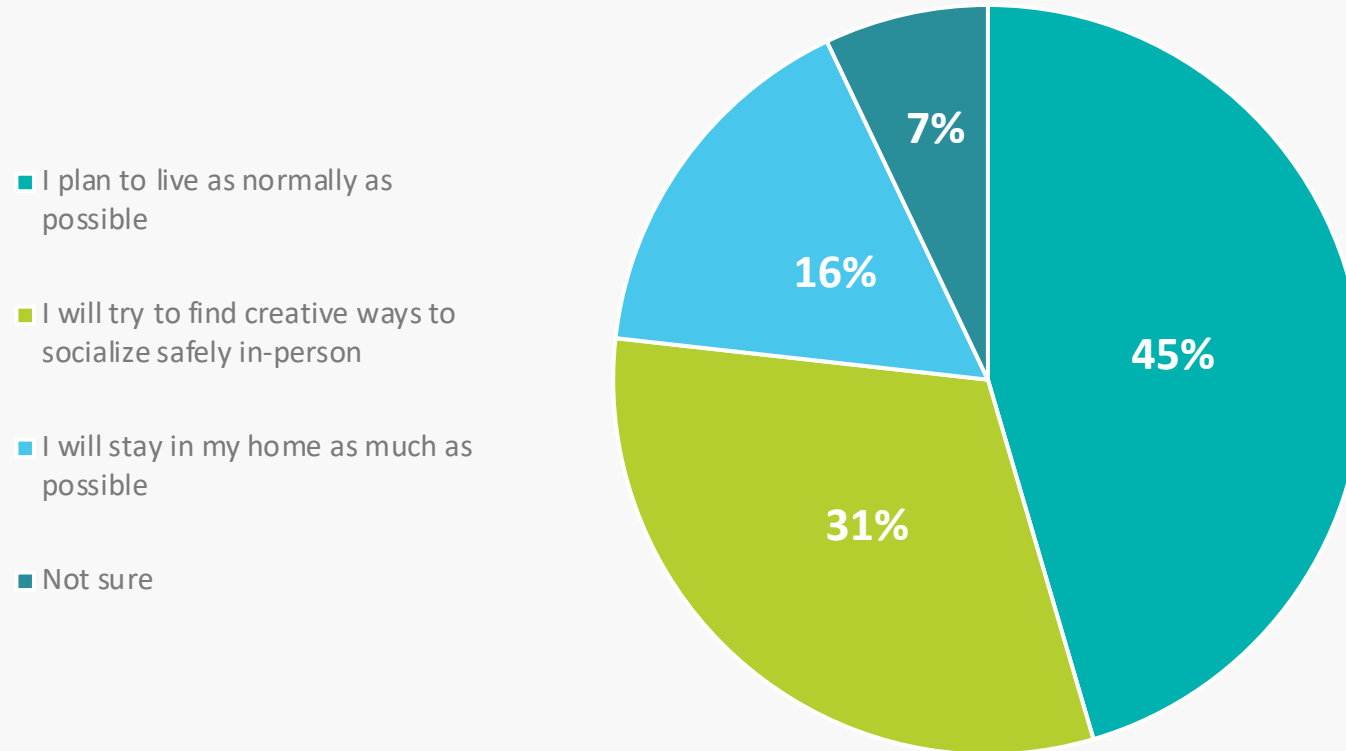
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About half (45%) of consumers plan to live as normally as possible during the holiday season and winter months

Mindset on socializing during holiday season and winter months



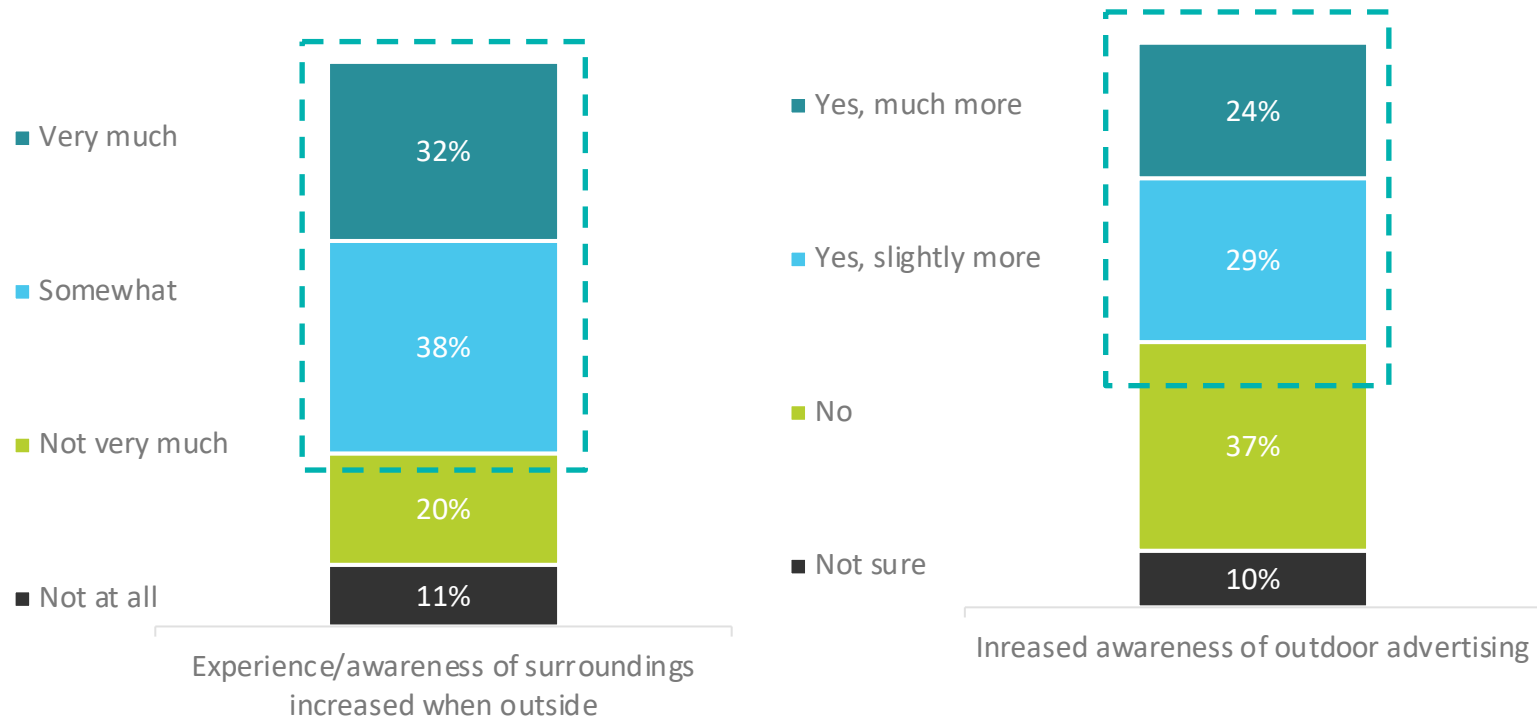
- **31% will try to find creative ways to socialize safely in person**
- **Only 16% plan to stay at home as much as possible**

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

Base (Weighted): Total sample (1000)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

Higher appreciation of outdoor surroundings following the lifting of COVID-19 restrictions



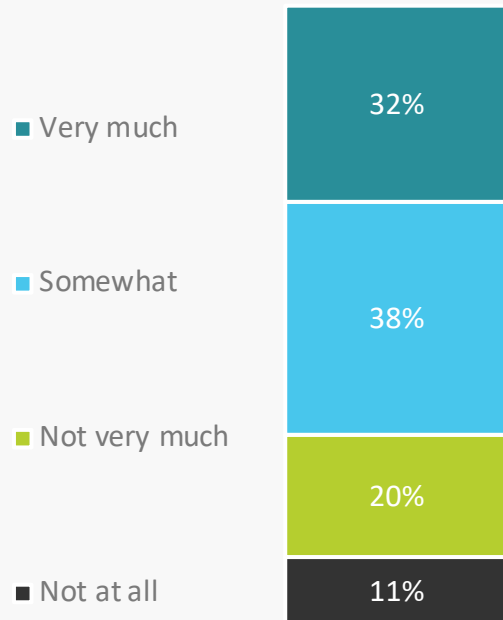
- 70% are more appreciative of the experience/awareness of their surroundings now that many COVID-19 restrictions have been lifted
- Over half (53%) are noticing OOH ads more now than pre-pandemic

Now that many COVID-19 restrictions are lifted, how much has your appreciation of the experience/awareness of your surroundings (e.g., street signs, murals, local store fronts, nature) increased when you are outside? / Would you say you are noticing billboards, outdoor video screens, posters, signage, and other outdoor ads more now than before the pandemic began?

Base (Weighted): Total sample (1000)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

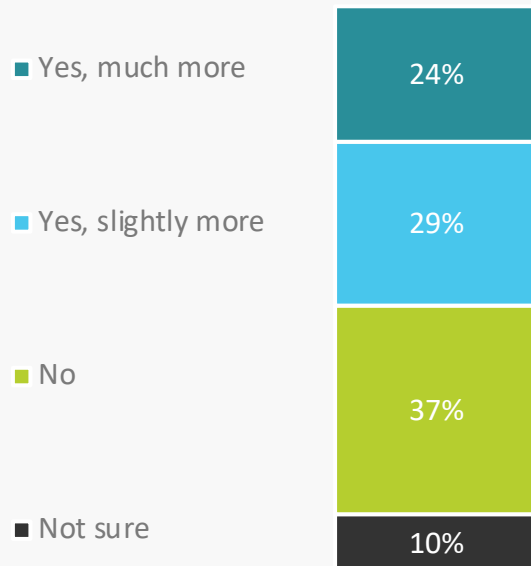
Appreciation of surroundings increased the most for Adults 25-44, high-income earners and major city residents



| Age | | | | | Income | | | City Size | |
|-------|-------|-------|-------|-------|----------------|---------------------|-------------------|------------|------------|
| 18-24 | 25-34 | 35-44 | 44-54 | 55-65 | Up to \$49,999 | \$50,000 - \$99,999 | \$100,000 or more | Major city | Minor city |
| 17% | 47% ▲ | 48% ▲ | 26% | 18% | 21% | 23% | 52% ▲ | 48% ▲ | 20% |
| 39% | 30% | 31% | 45% ▲ | 43% ▲ | 43% | 45% | 26% | 29% | 44% ▲ |
| 32% ▲ | 15% | 15% | 16% | 25% ▲ | 24% | 20% | 15% | 16% | 23% |
| 13% | 8% | 6% | 14% | 14% | 12% | 12% | 8% | 8% | 12% |

Now that many COVID-19 restrictions are lifted, how much has your appreciation of the experience/awareness of your surroundings (e.g., street signs, murals, local store fronts, nature) increased when you are outside?
 Base (Weighted): Total sample (1000) 18-24 (146), 25-34 (225), 35-44 (206), 45-54 (197), 55-65 (226) Up to \$49,999 (378), \$50,000-\$99,999 (287), \$100,000 or more (336), Major city (423), Minor city (577)

Adults 25-44, high-income earners, and major city residents are noticing OOH ads at significantly higher rates than pre-pandemic



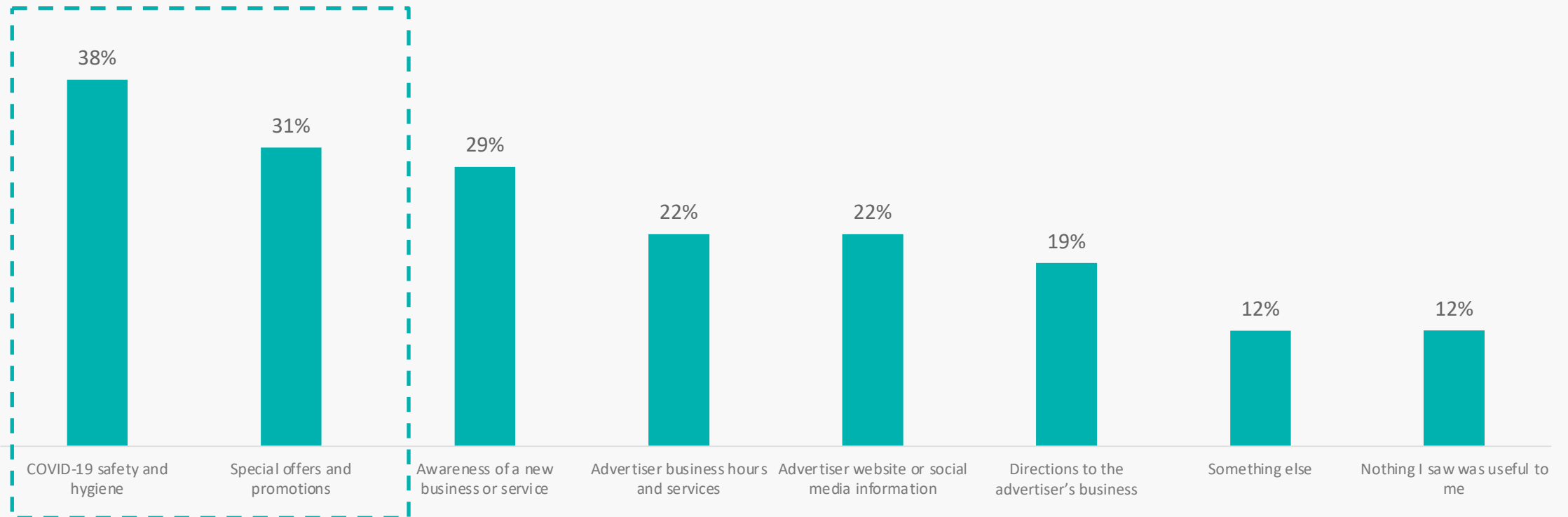
| Age | | | | | Income | | | City Size | |
|-------|-------|-------|-------|-------|----------------|---------------------|-------------------|------------|------------|
| 18-24 | 25-34 | 35-44 | 44-54 | 55-65 | Up to \$49,999 | \$50,000 - \$99,999 | \$100,000 or more | Major city | Minor city |
| 15% | 40% ▲ | 37% ▲ | 15% | 10% | 14% | 15% | 43% ▲ | 43% ▲ | 11% |
| 35% ▲ | 26% | 31% | 26% | 28% | 32% | 35% | 20% | 26% | 31% |
| 39% ▲ | 25% | 22% | 46% | 55% | 42% | 42% | 28% | 24% | 47% ▲ |
| 11% | 8% | 10% | 13% | 7% | 11% | 8% | 9% | 7% | 11% |

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

Base (Weighted): Total sample (1000) 18-24 (146), 25-34 (225), 35-44 (206), 45-54 (197), 55-65 (226) Up to \$49,999 (378), \$50,000-\$99,999 (287), \$100,000 or more (336), Major city (423), Minor city (577)

38% found COVID-19 safety and hygiene information as the most useful OOH ads, followed by OOH ads featuring special offers and promotions (31%)

Most useful outdoor ads noticed recently

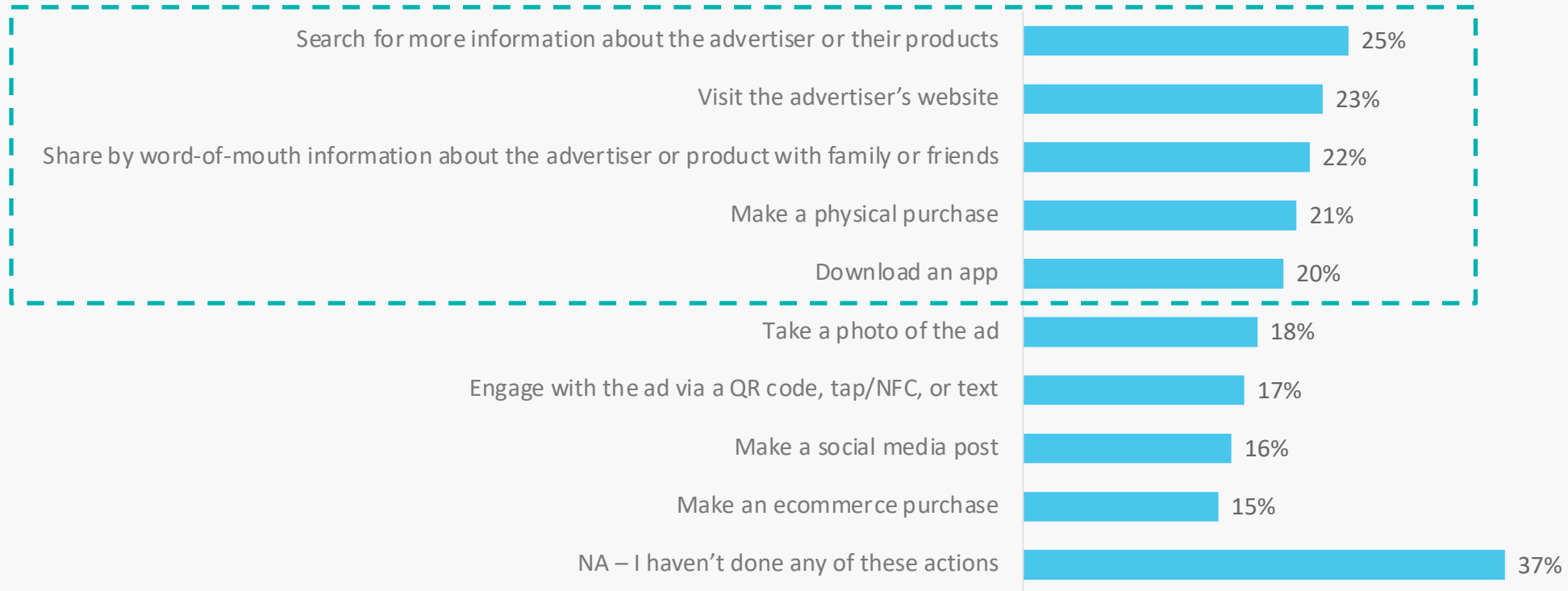


For those billboard, outdoor video screen, poster, signage, and other outdoor ads that you've noticed recently, what, if any, kinds did you see that were useful to you? Please select all that apply.

Base (Weighted): Total sample (1000)

Searching for information, visiting advertisers' websites, word-of-mouth sharing, purchasing, and app downloads are top actions produced by OOH ads

Action/s taken as a result of outdoor ads



For those billboard, outdoor video screen, poster, 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

Base (Weighted): Total sample (1000)

OOH ads result in a higher call to action among Adults 18-54, Males, high-income earners, and major city residents

Action/s taken as a result of outdoor ads

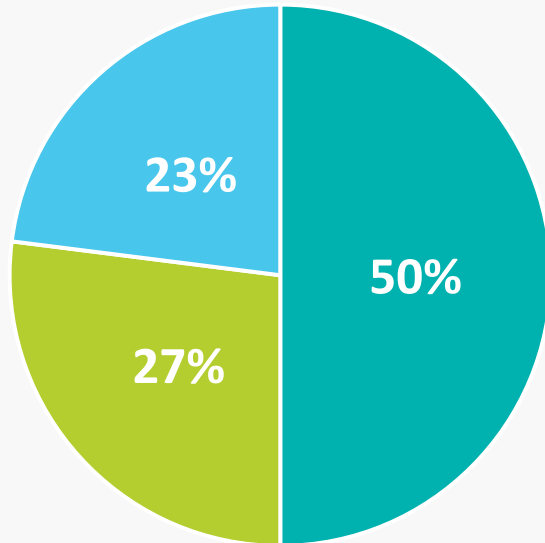
| Action | Total | Gender | | Age | | | Income | | | City Size | |
|-------------------------------------------------------------------------------------------|-------|--------|--------|-------|-------|-------|----------------|---------------------|-------------------|------------|------------|
| | | Male | Female | 18-34 | 35-54 | 55-65 | Up to \$49,999 | \$50,000 - \$99,999 | \$100,000 or more | Major city | Minor city |
| Search for more information about the advertiser or their products | 25% | 30% | 20% | 27% | 26% | 19% | 16% | 21% | 39% | 31% | 20% |
| Visit the advertiser's website | 23% | 27% | 18% | 26% | 25% | 14% | 14% | 19% | 36% | 30% | 17% |
| Share by word-of-mouth information about the advertiser or product with family or friends | 22% | 24% | 20% | 24% | 24% | 13% | 17% | 21% | 29% | 27% | 18% |
| Make a physical purchase | 21% | 28% | 14% | 22% | 23% | 14% | 16% | 17% | 30% | 26% | 17% |
| Download an app | 20% | 26% | 15% | 27% | 21% | 9% | 16% | 18% | 27% | 27% | 16% |
| Take a photo of the ad | 18% | 24% | 12% | 23% | 19% | 6% | 9% | 18% | 27% | 27% | 11% |
| Engage with the ad via a QR code, tap/NFC, or text | 17% | 24% | 10% | 24% | 17% | 5% | 8% | 13% | 31% | 28% | 9% |
| Make a social media post | 16% | 24% | 9% | 21% | 19% | 5% | 10% | 11% | 29% | 26% | 9% |
| Make an ecommerce purchase | 15% | 24% | 7% | 21% | 16% | 4% | 6% | 13% | 28% | 26% | 7% |

For those billboard, outdoor video screen, poster, 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

Base (Weighted): Total sample (1000), Male (485), Female (515), 18-34 (371), 35-54 (403), 55-65 (226), Up to \$49,999 (378), \$50,000-\$99,999 (287), \$100,000 or more (336), Major city (423), Minor city (577)

Half of consumers find contextual OOH advertising generates more interest

Interest in contextual advertising



- Yes, I find these types of ads of greater interest
- This type of ad doesn't have any impact on my interest one way or the other
- I am not interested in these types of ads

| Yes, I find these types of ads of greater interest | | |
|----------------------------------------------------|---------------------|-----|
| Gender | | |
| | Male | 57% |
| | Female | 43% |
| Age | | |
| | 18-24 | 42% |
| | 25-34 | 64% |
| | 35-44 | 63% |
| | 45-54 | 44% |
| | 55-65 | 34% |
| Income | | |
| | Up to \$49,999 | 38% |
| | \$50,000 - \$99,999 | 50% |
| | \$100,000 or more | 64% |
| City Size | | |
| | Major city | 62% |
| | Minor city | 41% |
| Region | | |
| | Northeast | 50% |
| | Midwest | 53% |
| | South | 49% |
| | West | 47% |

Some billboard, outdoor video screen, poster, 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?

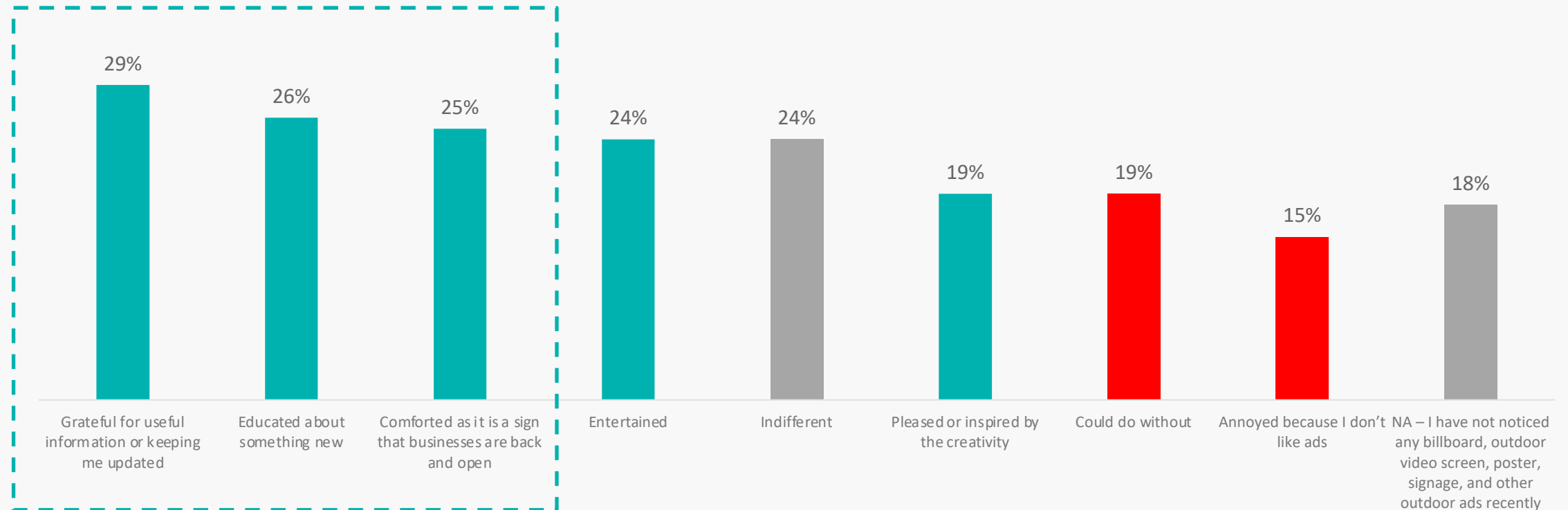
Base (Weighted): Total sample (1000)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

- Males, Adults 25-44, high-income earners, and major city residents are the most likely to find contextual OOH ads to be of greater interest
- Contextual ads feature messages relevant to current weather, time of day, etc.

OOH ads evoke positive reactions: 29% said they provide useful information, 26% were educated by them, and 25% felt comforted that they are a sign businesses are back and open

Reaction to recent outdoor ads

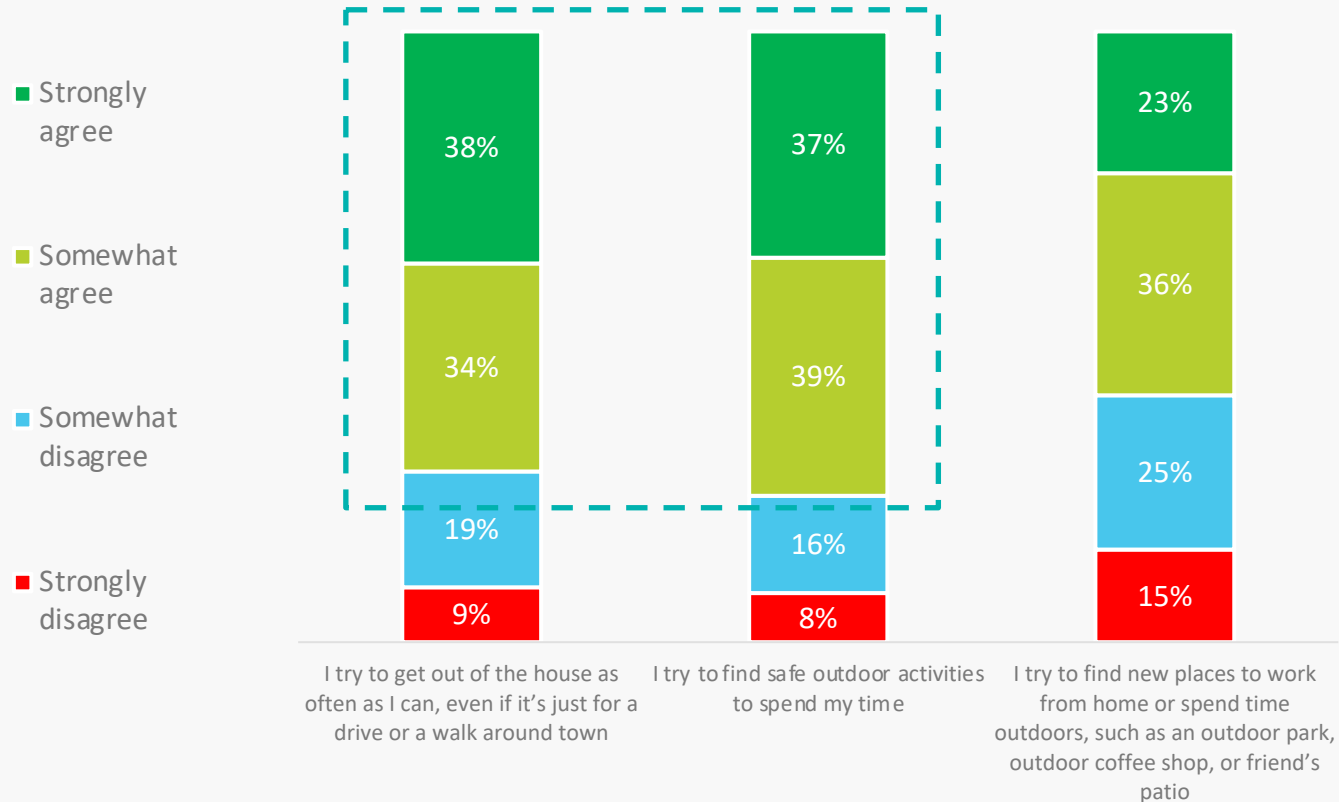


For the billboard, outdoor video screen, poster, signage and other outdoor ads you've noticed recently, which of the following best describe your reaction? Please select all that apply

Base (Weighted): Total sample (1000)

3 in 4 consumers try to get more out of the house and spend more time on safe outdoor activities – further enhancing the positive impact of OOH advertising through increased reach

Agreement to statement: Outdoor activity

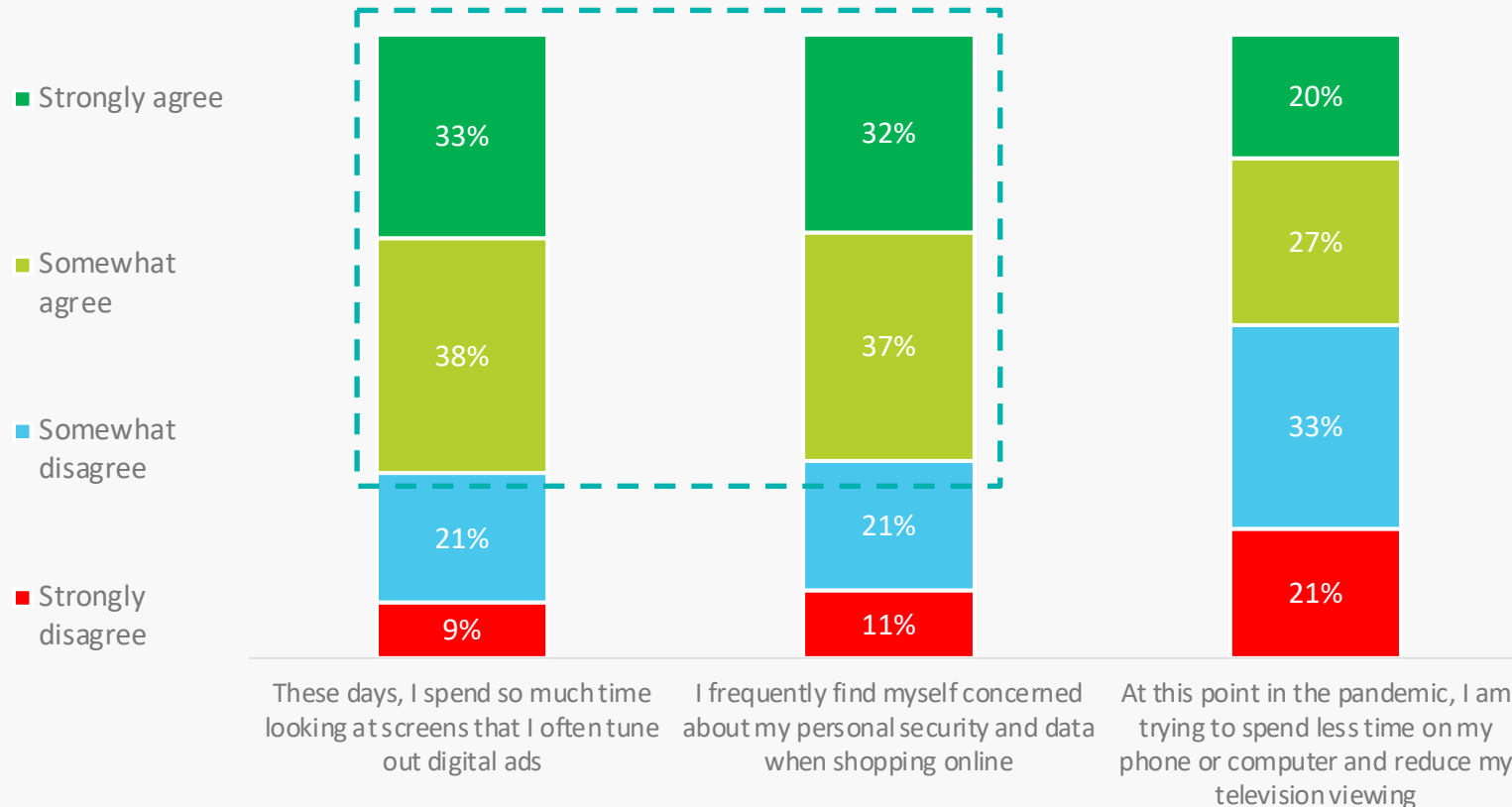


How much do you agree or disagree with each of the following statements?

Base (Weighted): Total sample (1000)

Digital device burnout is real: 71% often tune out digital device ads, 68% are concerned with personal data and security when shopping online, and 47% are trying to decrease phone, computer, or TV usage/viewing

Agreement to statement: Digital online devices & online security



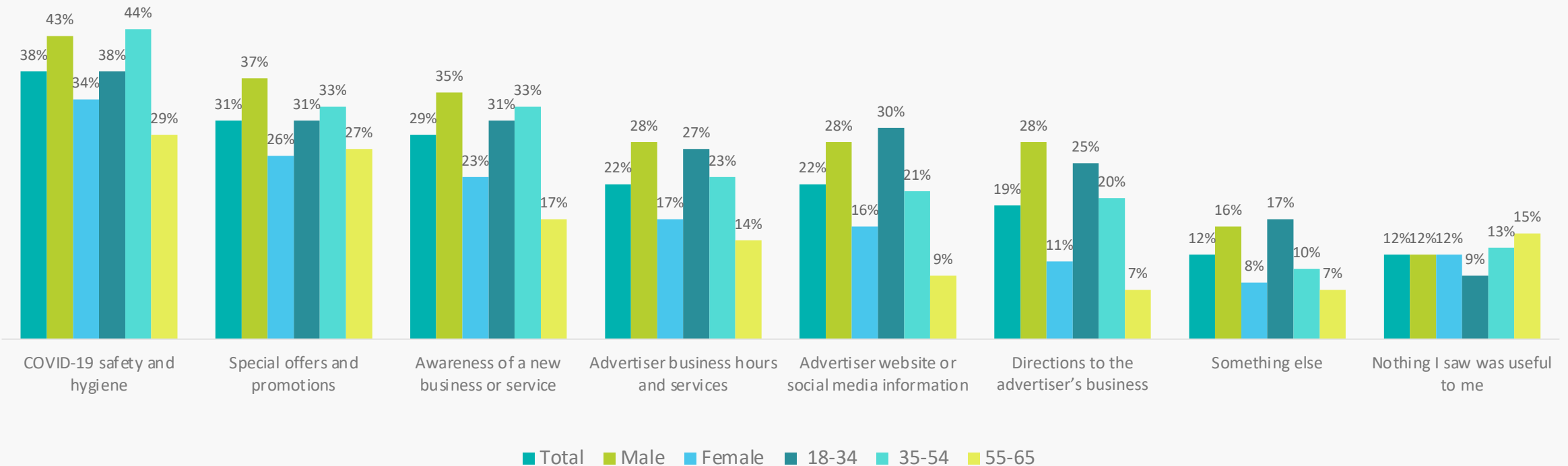
How much do you agree or disagree with each of the following statements?

Base (Weighted): Total sample (1000)

Appendix

Males and Adults 18-34 find the most use for OOH ads

Most useful outdoor ads noticed recently

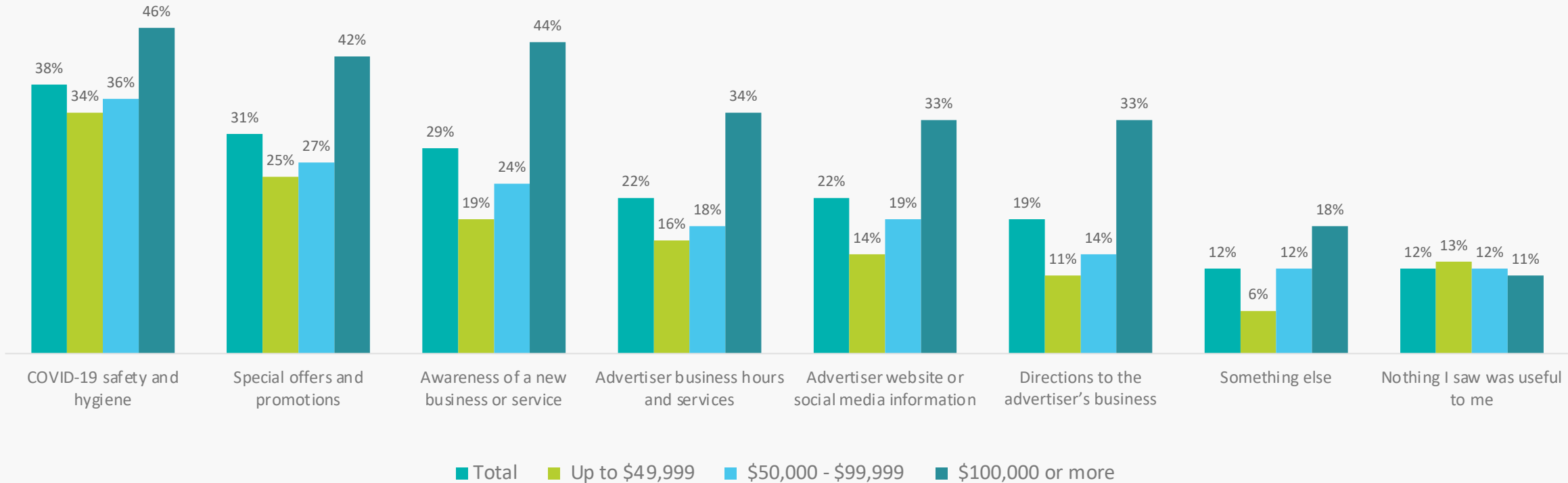


For those billboard, outdoor video screen, poster, signage, and other outdoor ads that you've noticed recently, what, if any, kinds did you see that were useful to you? Please select all that apply.

Base (Weighted): Total sample (1000), Male (485), Female (515), 18-34 (371) 35-54 (206), 45-54 (403), 55-65 (226)

High-income earners find OOH ads to be most useful

Most useful outdoor ads noticed recently



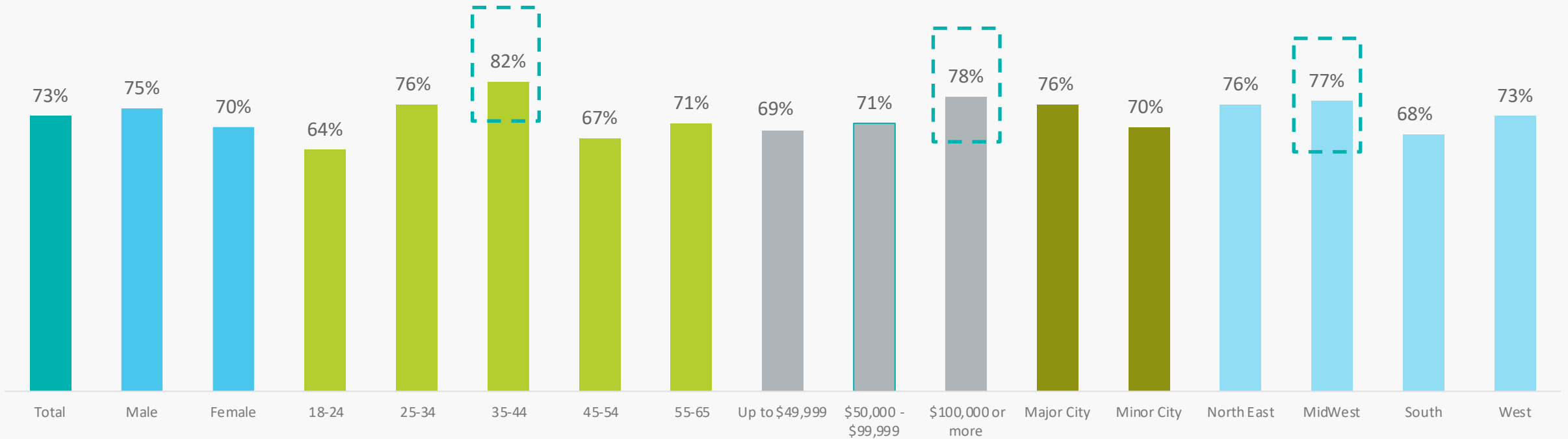
For those billboard, outdoor video screen, poster, signage, and other outdoor ads that you've noticed recently, what, if any, kinds did you see that were useful to you?

Base (Weighted): Total sample (1000) Up to \$49,999 (378), \$50,000-\$99,999 (287), \$100,000 or more (336), Major city (423), Minor city (577)



APPENDIX: Agreement to statement

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: NET Agree Score Plotted



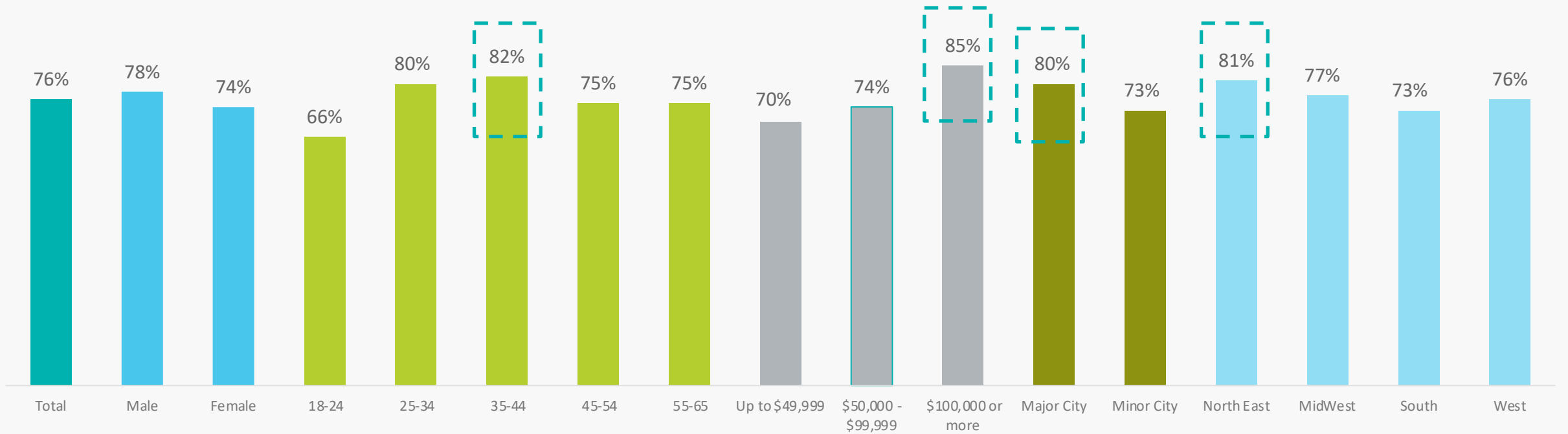
How much do you agree or disagree with each of the following statements?

Base (Weighted): Total sample (1000), Male (485), Female (515), 18-24 (146), 25-34 (225), 35-44 (206), 45-54 (197), 55-65 (226), Up to \$49,999 (378), \$50,000-\$99,999 (287), \$100,000 or more (336), Major city (423), Minor city (577), Northeast (190), Midwest (233), South (403), West (174)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

APPENDIX: Agreement to statement

I try to find safe outdoor activities to spend my time: NET Agree Score Plotted



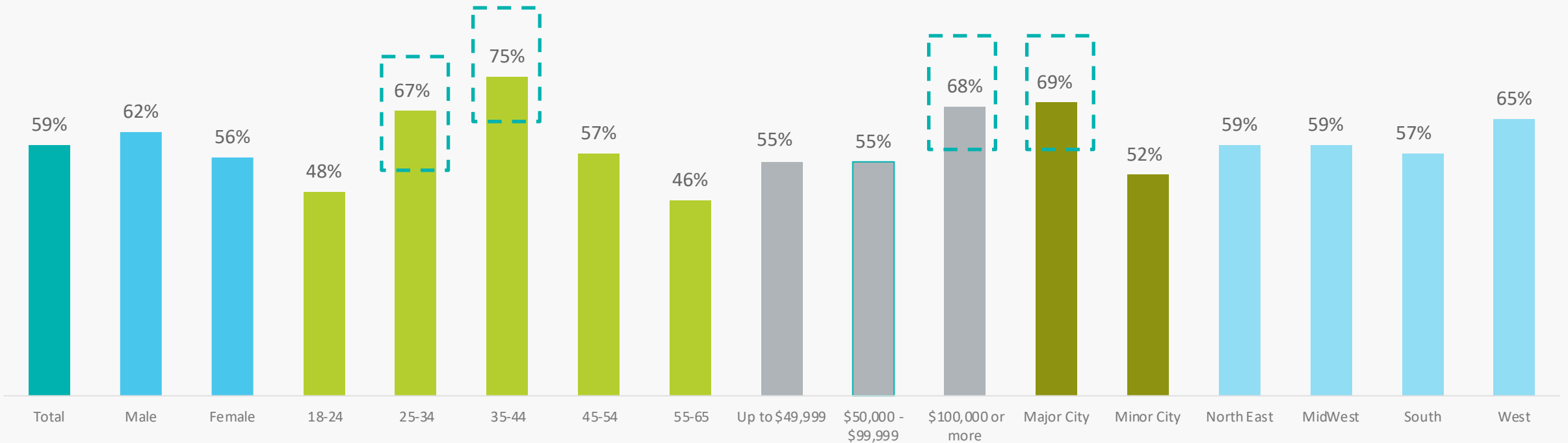
How much do you agree or disagree with each of the following statements?

Base (Weighted): Total sample (1000), Male (485), Female (515), 18-24 (146), 25-34 (225), 35-44 (206), 45-54 (197), 55-65 (226), Up to \$49,999 (378), \$50,000-\$99,999 (287), \$100,000 or more (336), Major city (423), Minor city (577), Northeast (190), Midwest (233), South (403), West (174)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

APPENDIX: Agreement to statement

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: NET Agree Score Plotted



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

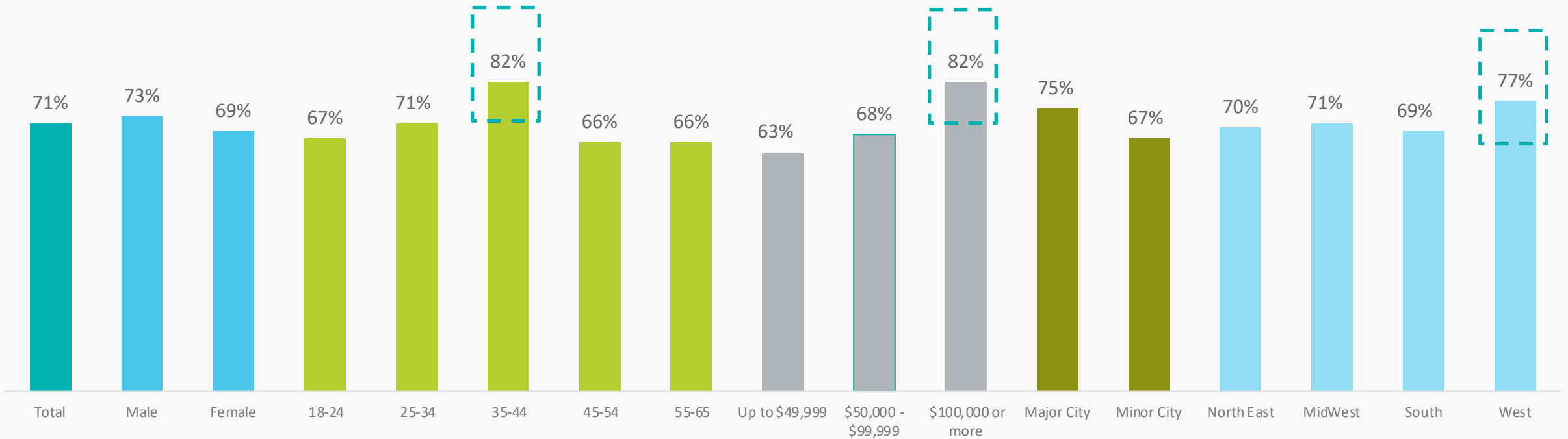
Base (Weighted): Total sample (1000), Male (485), Female (515), 18-34 (371), 35-54 (403), 55-65 (226), Up to \$49,999 (378), \$50,000-\$99,999 (287), \$100,000 or more (336), Major city (423), Minor city (577), Northeast (190),

Midwest (233), South (403), West (174)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

APPENDIX: Agreement to statement

These days, I spend so much time looking at screens that I often tune out digital ads : NET Agree Score Plotted



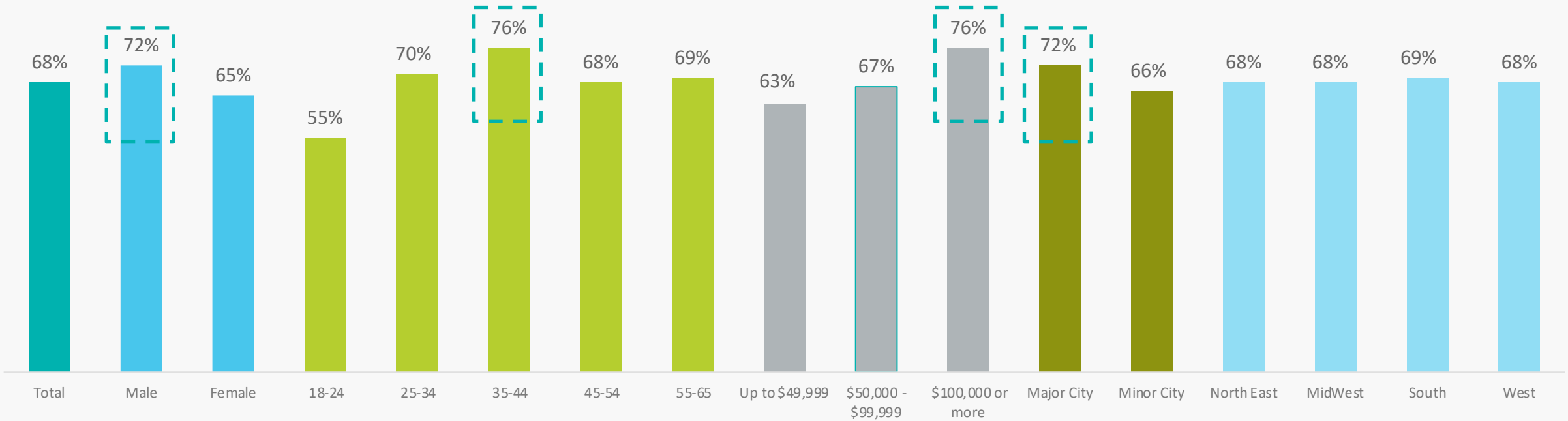
How much do you agree or disagree with each of the following statements?

Base (Weighted): Total sample (1000), Male (485), Female (515), 18-24 (146), 25-34 (225), 35-44 (206), 45-54 (197), 55-65 (226), Up to \$49,999 (378), \$50,000-\$99,999 (287), \$100,000 or more (336), Major city (423), Minor city (577), Northeast (190), Midwest (233), South (403), West (174)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

APPENDIX: Agreement to statement

I frequently find myself concerned about my personal security and data when shopping online: NET Agree Score Plotted



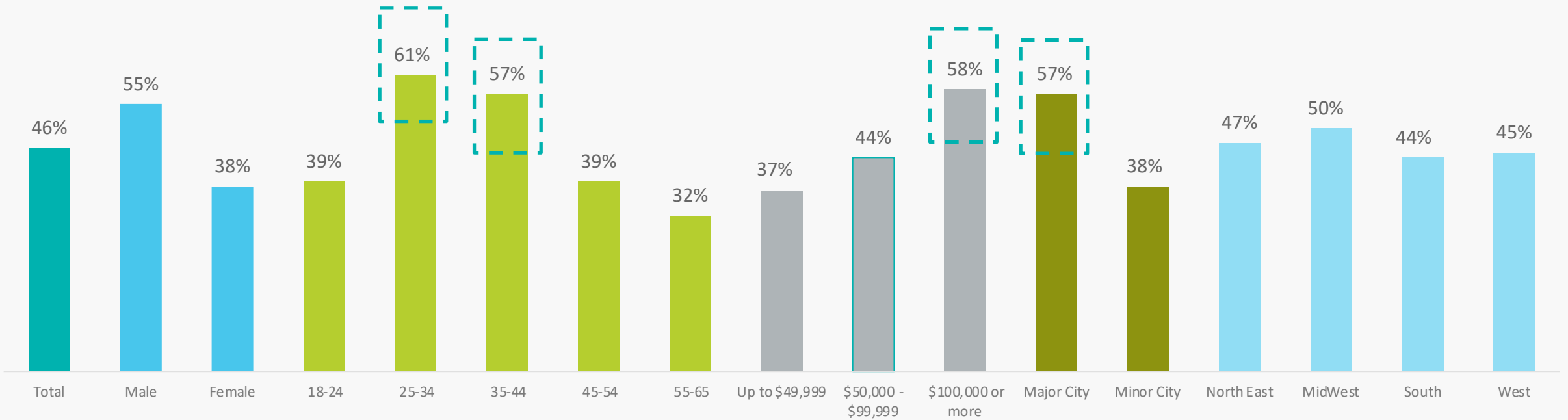
How much do you agree or disagree with each of the following statements?

Base (Weighted): Total sample (1000), Male (485), Female (515), 18-24 (146), 25-34 (225), 35-44 (206), 45-54 (197), 55-65 (226), Up to \$49,999 (378), \$50,000-\$99,999 (287), \$100,000 or more (336), Major city (423), Minor city (577), Northeast (190), Midwest (233), South (403), West (174)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval

APPENDIX: Agreement to statement

At this point in the pandemic, I am trying to spend less time on my phone or computer and reduce my television viewing: NET Agree Score Plotted



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

Base (Weighted): Total sample (1000), Male (485), Female (515), 18-24 (146), 25-34 (225), 35-44 (206), 45-54 (197), 55-65 (226), Up to \$49,999 (378), \$50,000-\$99,999 (287), \$100,000 or more (336), Major city (423), Minor city (577), Northeast (190), Midwest (233), South (403), West (174)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval



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