

MORNING CONSULT

aaa

Out of Home Advertising Association of America

OUT OF HOME ADVERTISING STUDY

MARCH 2023

KEY FINDINGS

- 1. Travel Modes and Commuting Patterns:** Nearly nine-in-ten adults have **driven or ridden in any type of vehicle (86%)** and over half have **walked in a town, city, or downtown (58%)** within the last 30 days. Over three-quarters of employed adults **travel to work at least part of the week (77%)**, over half **travel every workday (55%)**, one-fifth are in a hybrid model of **part-time commuting (22%)** or work from home (20%), and one-in-ten mostly travel to work but also work from home some days (12%).
- 2. Noticing OOH Advertisements:** Nine-in-ten adults have **seen an OOH ad (88%)** in the past 30 days, about seventy percent have seen a **billboard (69%)**, and over sixty percent have noticed a **printed sign (63%)** in the past 30 days.
- 3. Favorability of OOH Advertisements:** Among all major media types, Adults express the **strongest favorability** towards **billboards (61%)**, OOH has higher net favorability than all forms of digital media, radio, podcasts and streaming audio.
- 4. Engagement with OOH Advertisements:** Over three-quarters of adults recently **engaged with an OOH ad (78%)**, including **engagements on their smartphone (76%)**. At least two-in-five adults **used an online search (44%)** or **have watched a television program (41%)** within the past 60 days after seeing an OOH ad. Half of adults have used their smartphones or mobile device **for an online search (51%)** and two-in-five have used their smartphones or mobile device **to make an online purchase (43%)** within the past 60 days after seeing an OOH ad.
- 5. Recent Activity with OOH Advertisements:** Many adults recall visiting a store, business, or restaurant after noticing an OOH ad. Three-in-ten adults (30%) have **noticed an OOH ad** within the past 60 days that gave them directions, with **higher rates** among **younger adults (18-34: 37%)**, **Asian adults (38%)**, **Hispanic adults (35%)**, and **middle-income adults (50k-100k: 33%)**. Among adults who report to have noticed an OOH ad within the past 60 days, two-in-five (43%) visited the store, business, or restaurant within 30 minutes of seeing the ad. Among adults who report visiting the store, business, or restaurant within 30 minutes, four-in-five (78%) made a purchase the last time they did this.
- 6. Aligning OOH Advertisements to Needs/Interests:** At least half of all adults **strongly agree** or **somewhat agree** that they notice OOH ads more often when they are **aligned with their needs and interests (57%)** or **when they are tailored to the location they are in (54%)**. Adults of minority ethnic descent are more likely than white adults to notice OOH ads that reflect their cultural identity. Three-in-five **Asian adults (59%)**, **Black adults (58%)**, **Hispanic adults (56%)**, and **younger adults (18-34: 50%)** are **much more likely** or **somewhat more likely** to see an OOH ad that reflects their cultural identity.



METHODOLOGY

This poll was conducted between November 10-November 15, 2022 among a sample of 1,461 Adults 18-64. The interviews were conducted online and the data were weighted to approximate a target sample of Adults 18-64 based on gender, age, race, educational attainment, and region. Results from the full survey have a margin of error of plus or minus 3 percentage points.

CONTENTS

TRAVEL MODES AND COMMUTING

AWARENESS OF OOH ADVERTISING

ENGAGEMENT WITH OOH ADVERTISING

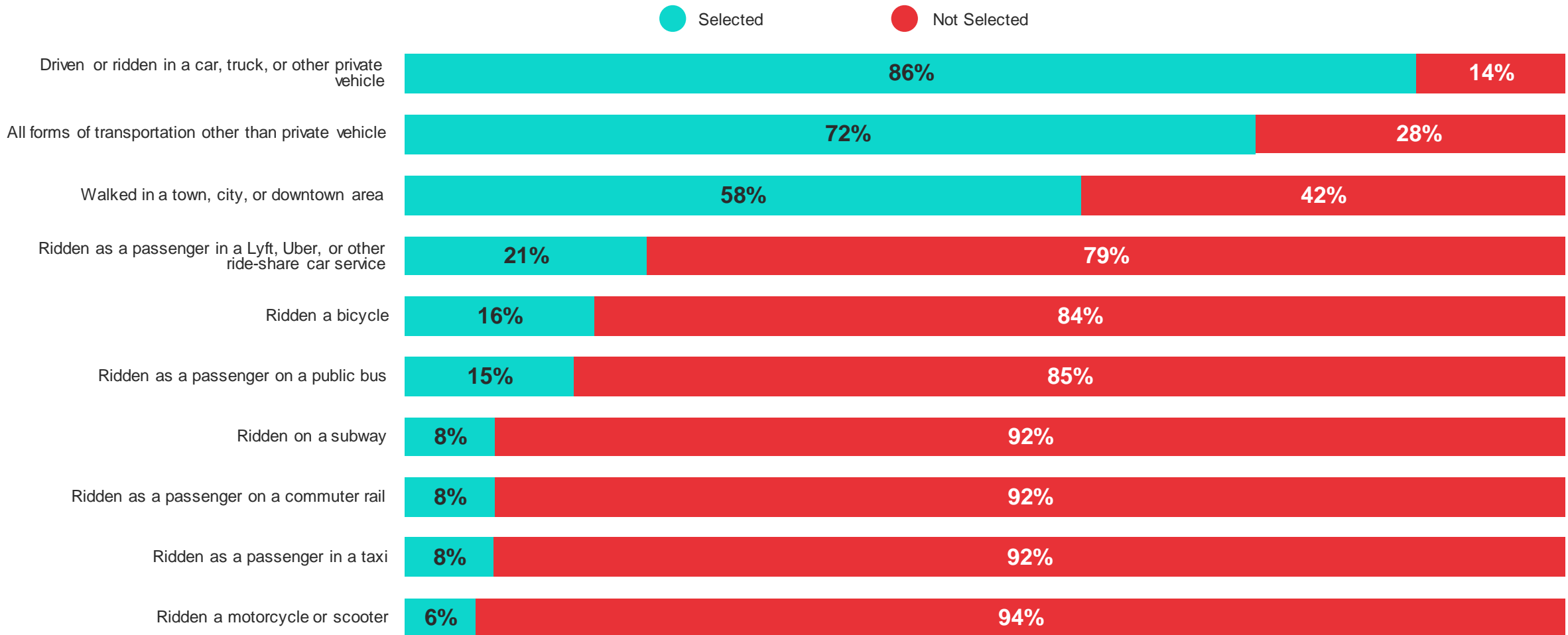
APPENDIX



TRAVEL PATTERNS

Nearly nine-in-ten adults have *driven or ridden in any type of vehicle* (86%) and over half have *walked in a town, city, or downtown* (58%) within the last 30 days.

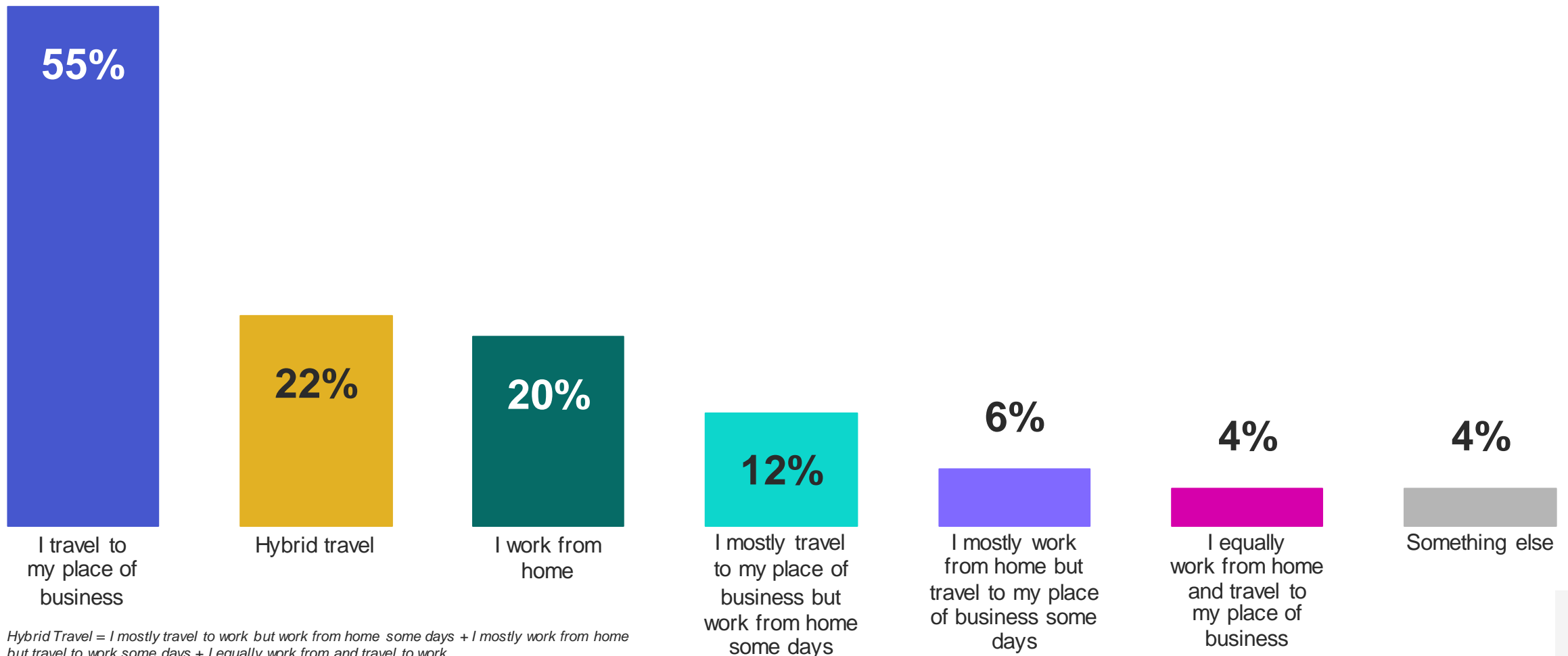
Within the last 30 days, have you done any of the following activities? Select all that apply.



TRAVEL PATTERNS

Over three-quarters of employed adults *travel to work at least part of the week* (77%), over half *travel every workday* (55%), one-fifth are in a *hybrid model of part-time commuting* (22%) or *work from home* (20%), and one-in-ten *mostly travel to work but also work from home some days* (12%).

Which statement best describes your work environment, even if none are exactly correct? **N = 805 ADULTS WHO ARE EMPLOYED, MOE = +/-3%**



CONTENTS

TRAVEL MODES AND COMMUTING

AWARENESS OF OOH ADVERTISING

ENGAGEMENT WITH OOH ADVERTISING

APPENDIX

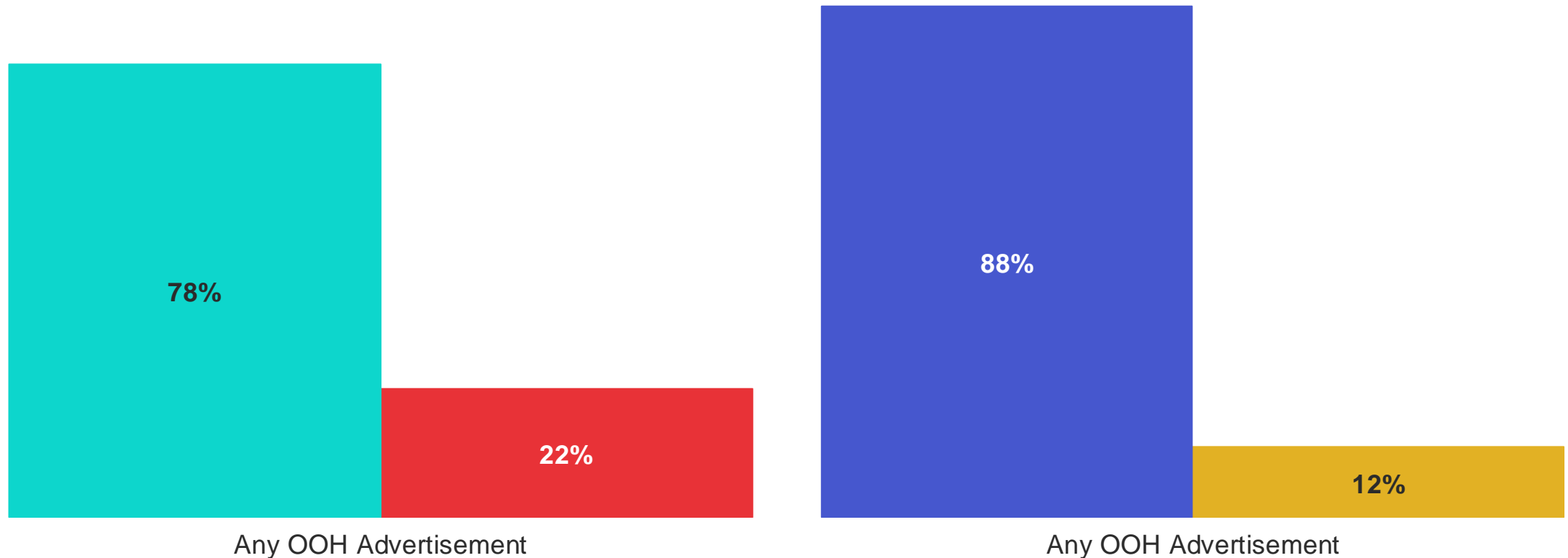


AWARENESS OF OOH ADVERTISING

Nine-in-ten adults (88%) have noticed at least one form of any OOH ads *in the past 30 days* and four-in-five (78%) have noticed at least one format of OOH ads *in the past 7 days*.

When was the last time you noticed advertising in each of the following types of out of home formats or environments?

- In the past 7 days
- Not in the past 7 days
- In the past 30 days
- Not in the past 30 days



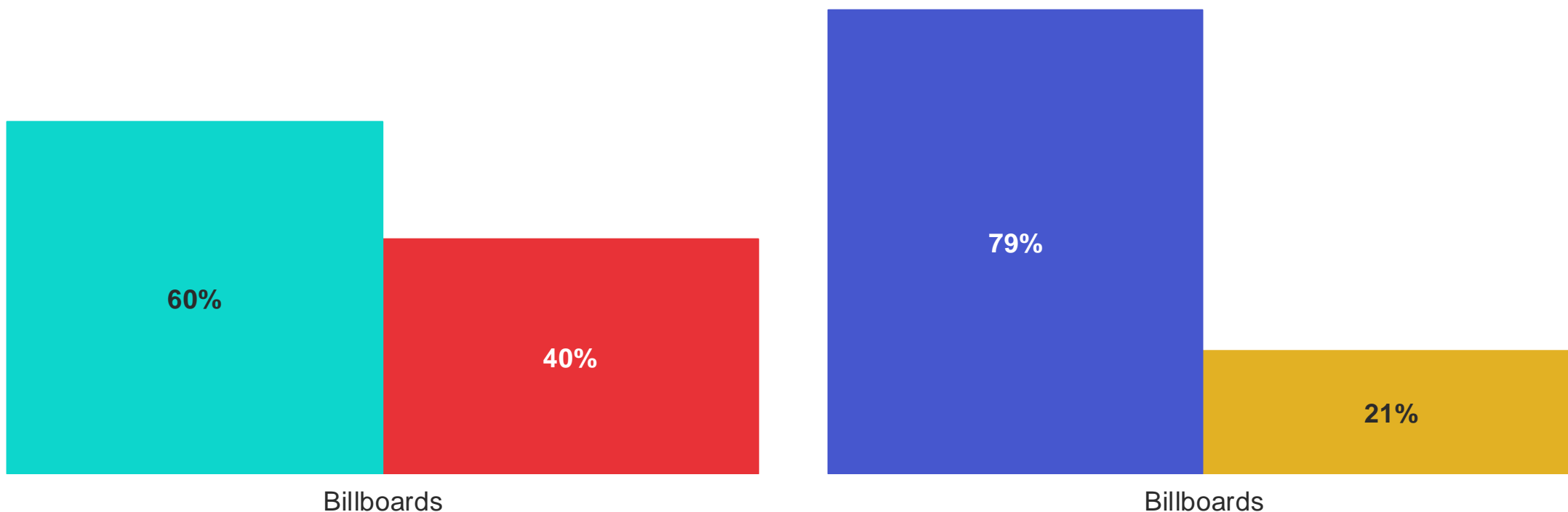
Data in charts reflects percent noticing at least one form of any OOH advertisements in the past 7 days and in the past 30 days, see appendix for full sample details.

AWARENESS OF OOH ADVERTISING

Four-in-five adults (79%) have noticed at least one form of billboard ads *in the past 30 days* and three-in-five (60%) have noticed at least one form of billboard ads *in the past 7 days*.

When was the last time you noticed advertising in each of the following types of out of home formats or environments?

- In the past 7 days
- Not in the past 7 days
- In the past 30 days
- Not in the past 30 days



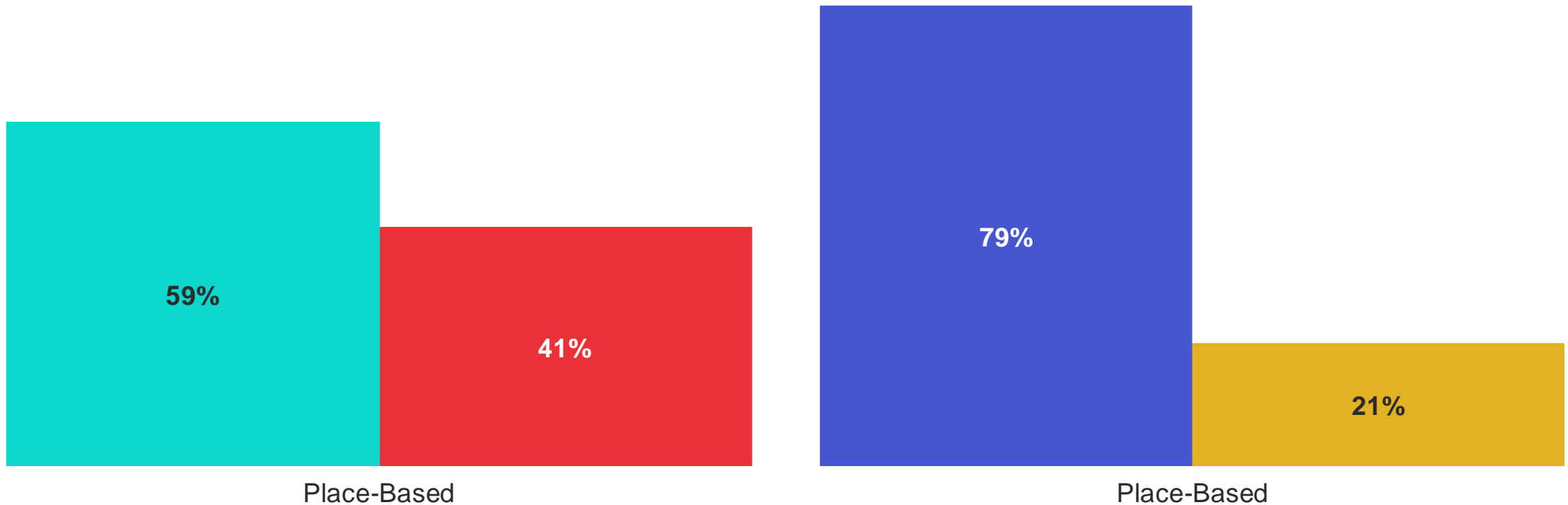
Data in charts reflects percent noticing at least one form of billboard advertisements in the past 7 days and in the past 30 days, see appendix for full sample details.

AWARENESS OF OOH ADVERTISING

Four-in-five adults (79%) have noticed at least one form of place-based ads *in the past 30 days* and three-in-five (59%) have noticed at least one form of place-based ads *in the past 7 days*.

When was the last time you noticed advertising in each of the following types of out of home formats or environments?

- In the past 7 days
- Not in the past 7 days
- In the past 30 days
- Not in the past 30 days



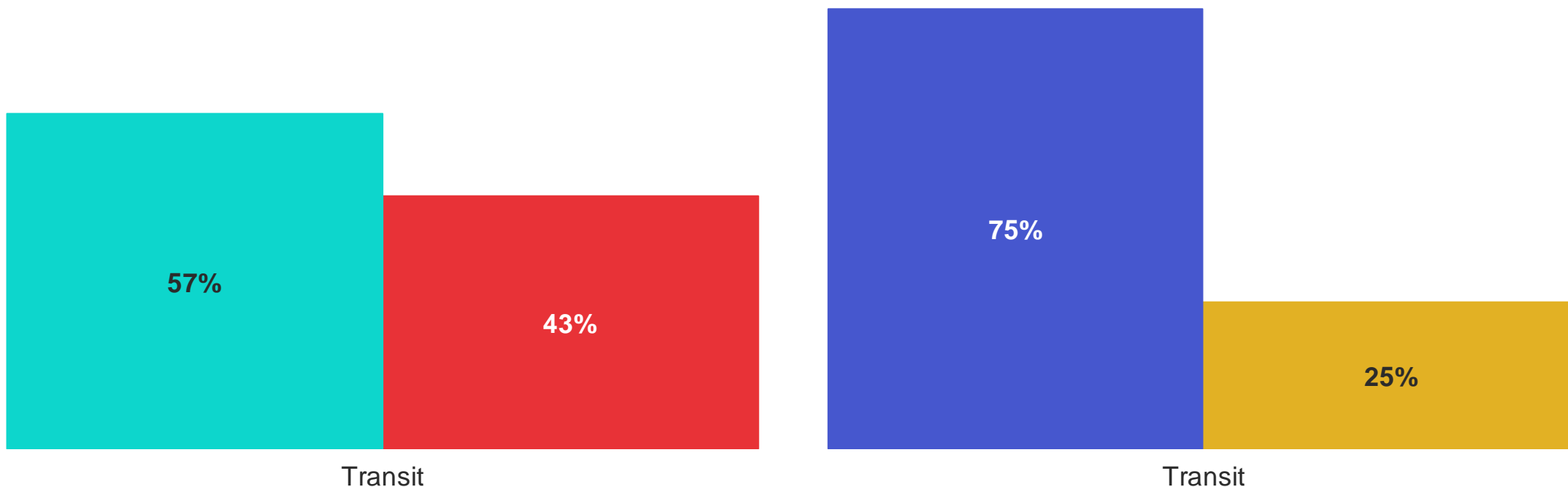
Data in charts reflects percent noticing at least one form of place-based advertisements in the past 7 days and in the past 30 days, see appendix for full sample details.

AWARENESS OF OOH ADVERTISING

Three-fourths of adults (75%) have noticed at least one form of transit ads *in the past 30 days* and over half (57%) have noticed at least one form of transit ads *in the past 7 days*.

When was the last time you noticed advertising in each of the following types of out of home formats or environments?

- In the past 7 days
- Not in the past 7 days
- In the past 30 days
- Not in the past 30 days



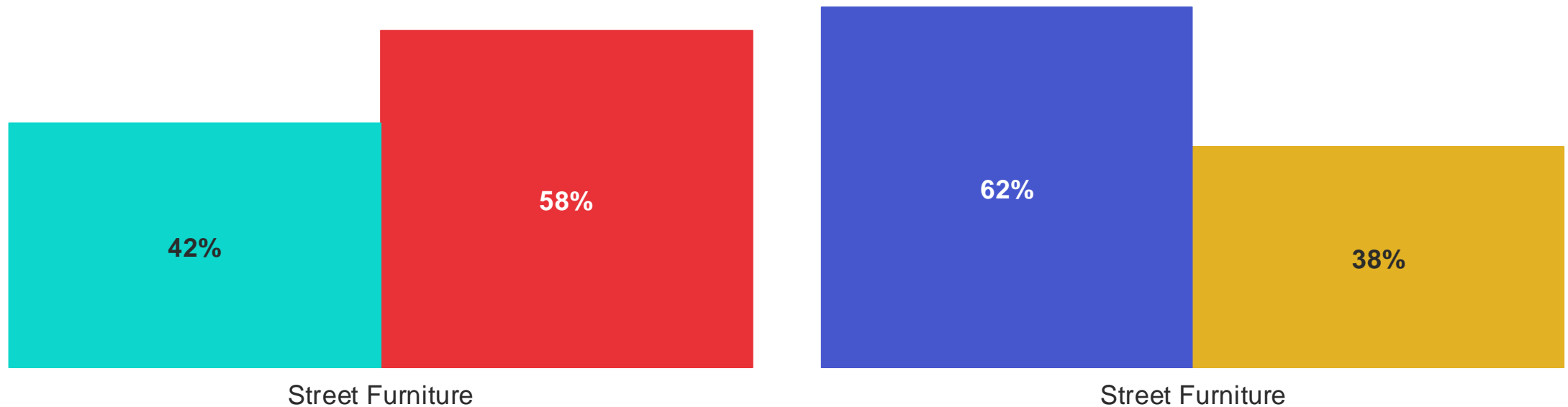
Data in charts reflects percent noticing at least one form of transit advertisements in the past 7 days and in the past 30 days, see appendix for full sample details.

AWARENESS OF OOH ADVERTISING

Three-in-five adults (62%) have noticed at least one form of street furniture ads *in the past 30 days* and two-in-five (42%) have noticed at least one form of street furniture ads *in the past 7 days*.

When was the last time you noticed advertising in each of the following types of out of home formats or environments?

- In the past 7 days
- Not in the past 7 days
- In the past 30 days
- Not in the past 30 days



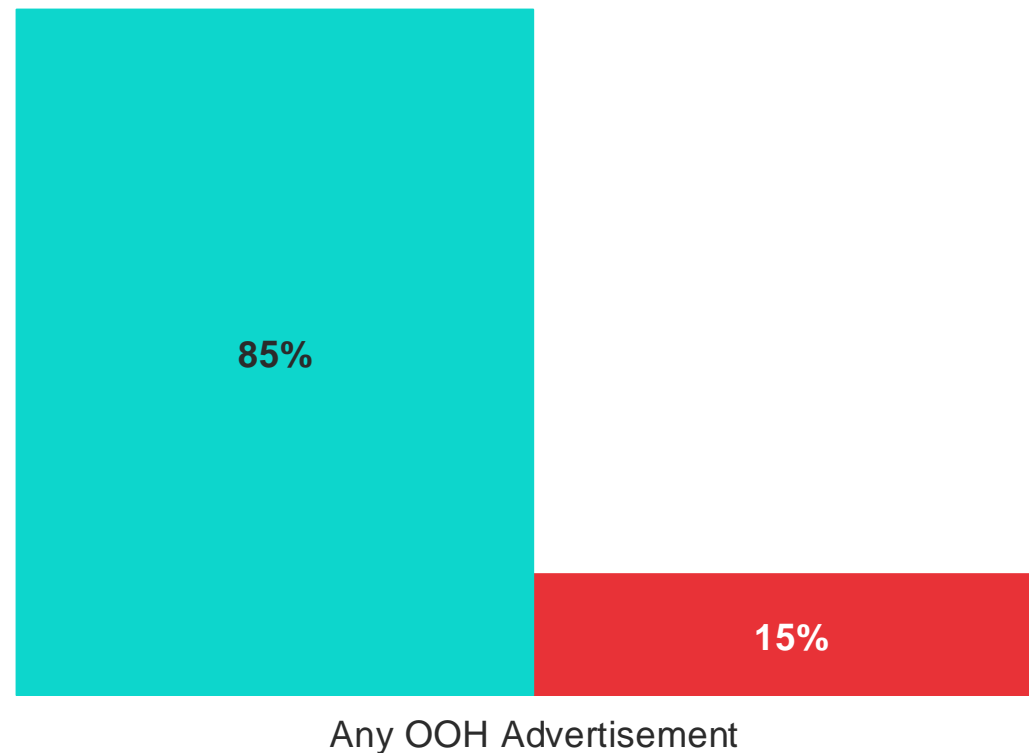
Data in charts reflects percent noticing at least one form of street furniture advertisements in the past 7 days and in the past 30 days, see appendix for full sample details.

AWARENESS OF OOH ADVERTISING

Eighty-five percent of adults (85%) look at at least one form of any OOH ads *all the time, most of the time, or some of the time*.

How often, if at all, do you look at advertising messages in each of the following out of home formats or environments?

● Look all, most, or some of the time ● Rarely or never look

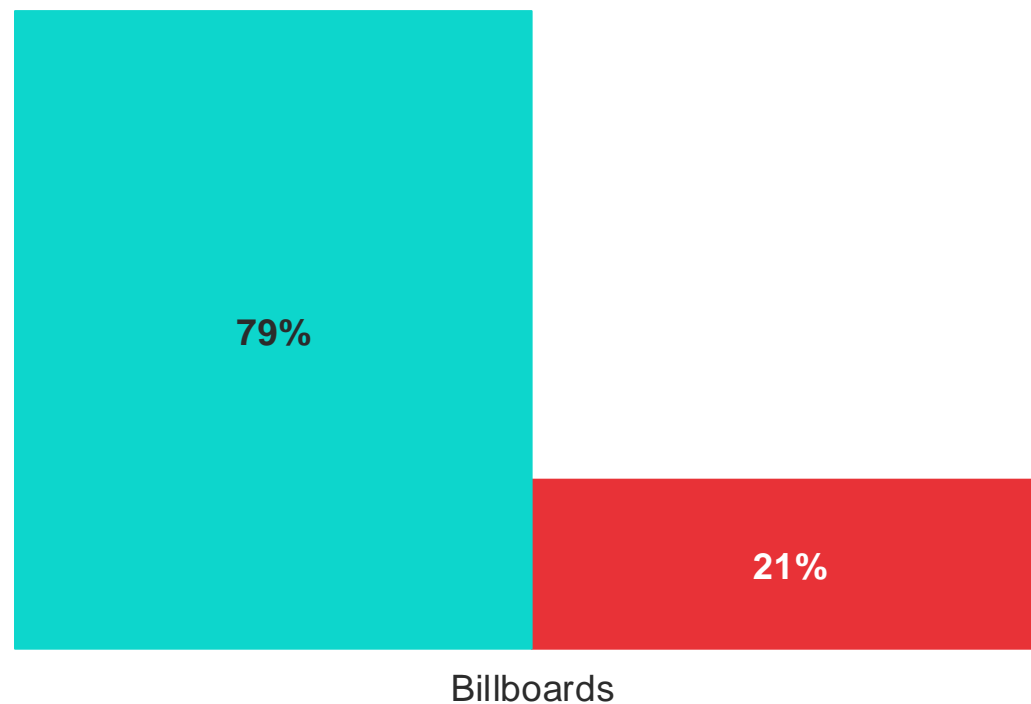


AWARENESS OF OOH ADVERTISING

Four-in-five adults (79%) look at at least one form of billboard ads *all the time, most of the time, or some of the time*.

How often, if at all, do you look at advertising messages in each of the following out of home formats or environments?

● Look all, most, or some of the time ● Rarely or never look

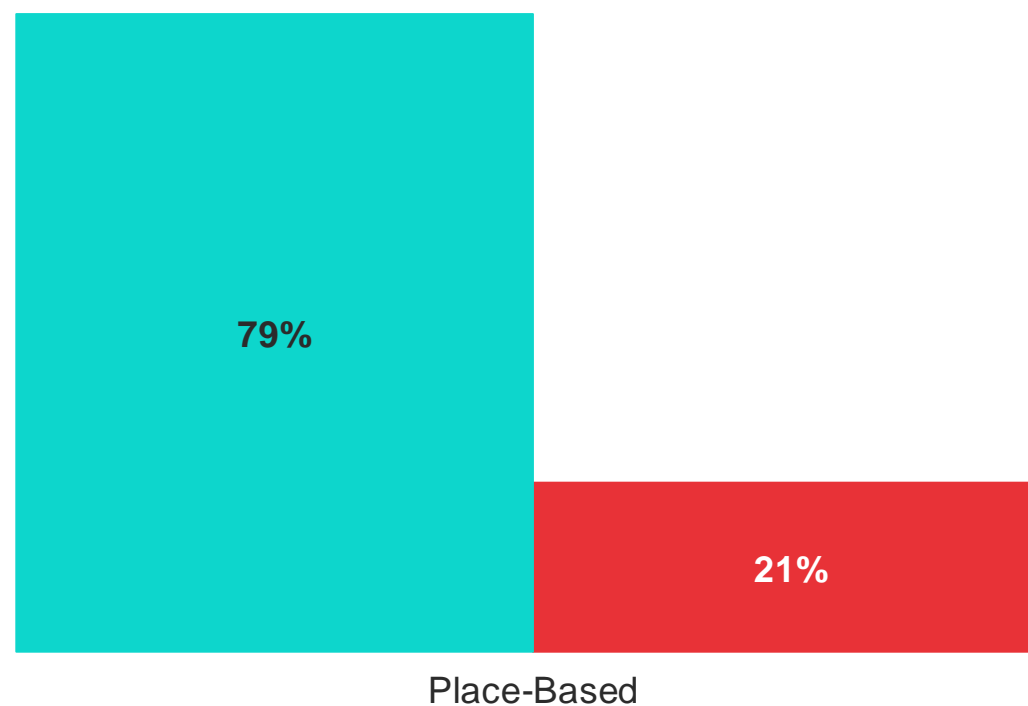


AWARENESS OF OOH ADVERTISING

Four-in-five adults (79%) look at at least one form of place-based ads *all the time, most of the time, or some of the time*.

How often, if at all, do you look at advertising messages in each of the following out of home formats or environments?

● Look all, most, or some of the time ● Rarely or never look

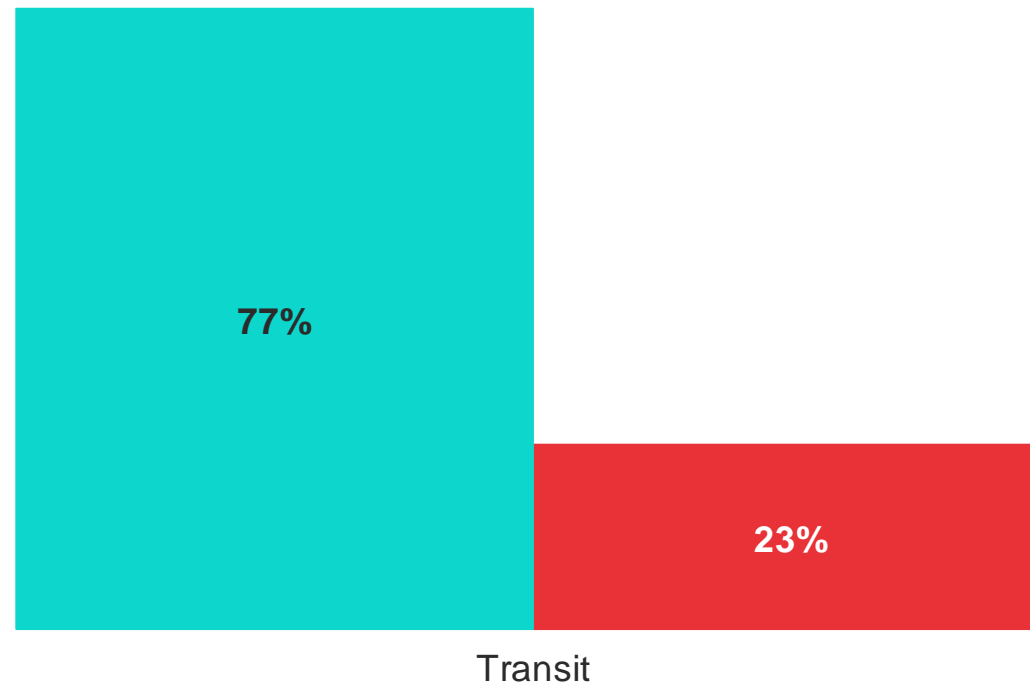


AWARENESS OF OOH ADVERTISING

Three-fourths of adults (77%) look at at least one form of transit ads *all the time, most of the time, or some of the time*.

How often, if at all, do you look at advertising messages in each of the following out of home formats or environments?

- Look all, most, or some of the time
- Rarely or never look



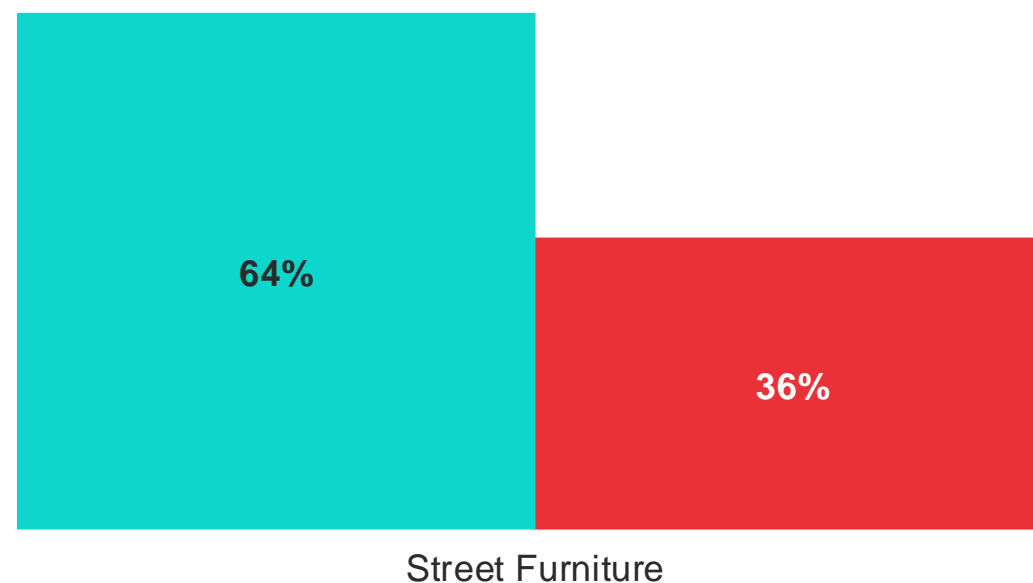
Data in charts reflects percent looking at least one form of transit advertisements all the time or most of the time as well as looking rarely and never, see appendix for full sample details.

AWARENESS OF OOH ADVERTISING

Two thirds of adults (64%) look at at least one form of street furniture OOH ads *all the time, most of the time, or some of the time*.

How often, if at all, do you look at advertising messages in each of the following out of home formats or environments?

● Look all, most, or some of the time ● Rarely or never look



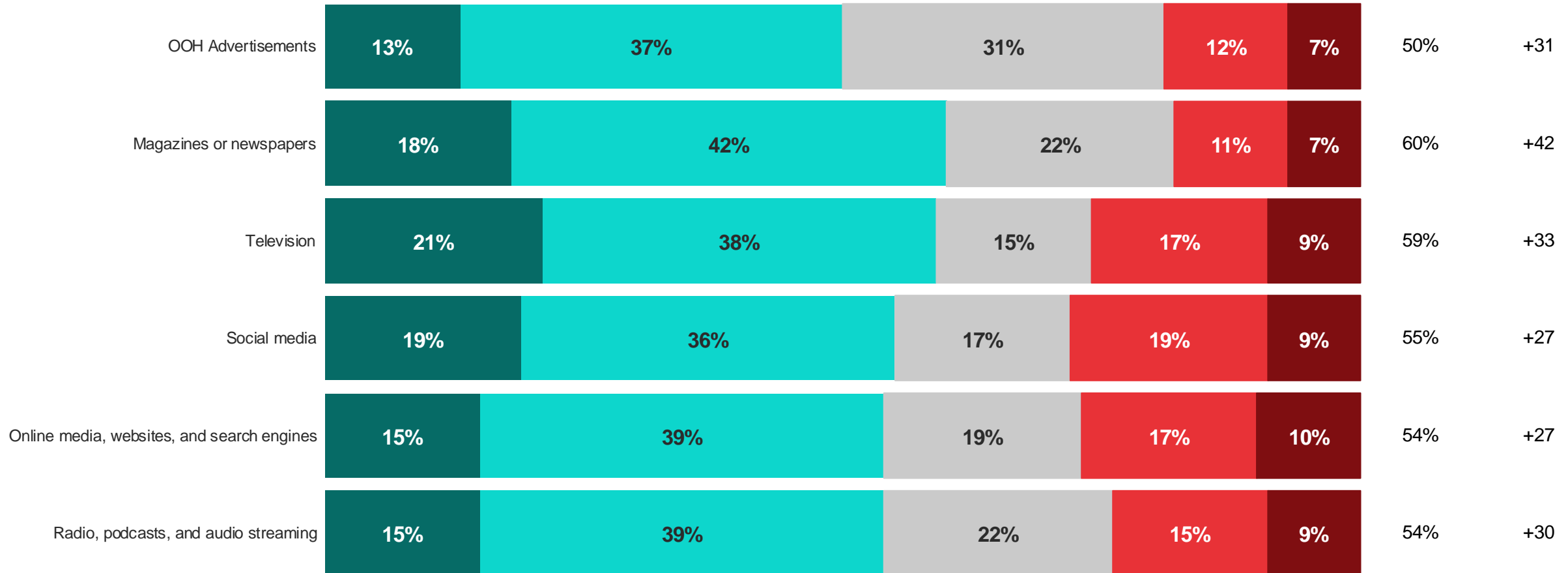
AWARENESS OF OOH ADVERTISING

The average net favorability across *all forms of OOH ads* (+31) is higher than the net favorability of *social media* (+27), *online media, websites, and search engines* (+27), and *radio, podcasts, and audio streaming* (+30).

During your typical daily activities when you view or hear advertisements in the following locations or formats, do you have a favorable or unfavorable opinion towards the advertising?

● Very favorable
 ● Somewhat favorable
 ● Don't know/No opinion
 ● Somewhat unfavorable
 ● Very unfavorable

Total Favorable **Net Favorability**



OOH Advertisement reflects average across each format of OOH advertisement. Total Favorable = Very favorable + Somewhat favorable | Net Favorability = (Very favorable + Somewhat favorable) - (Very unfavorable + Somewhat unfavorable)

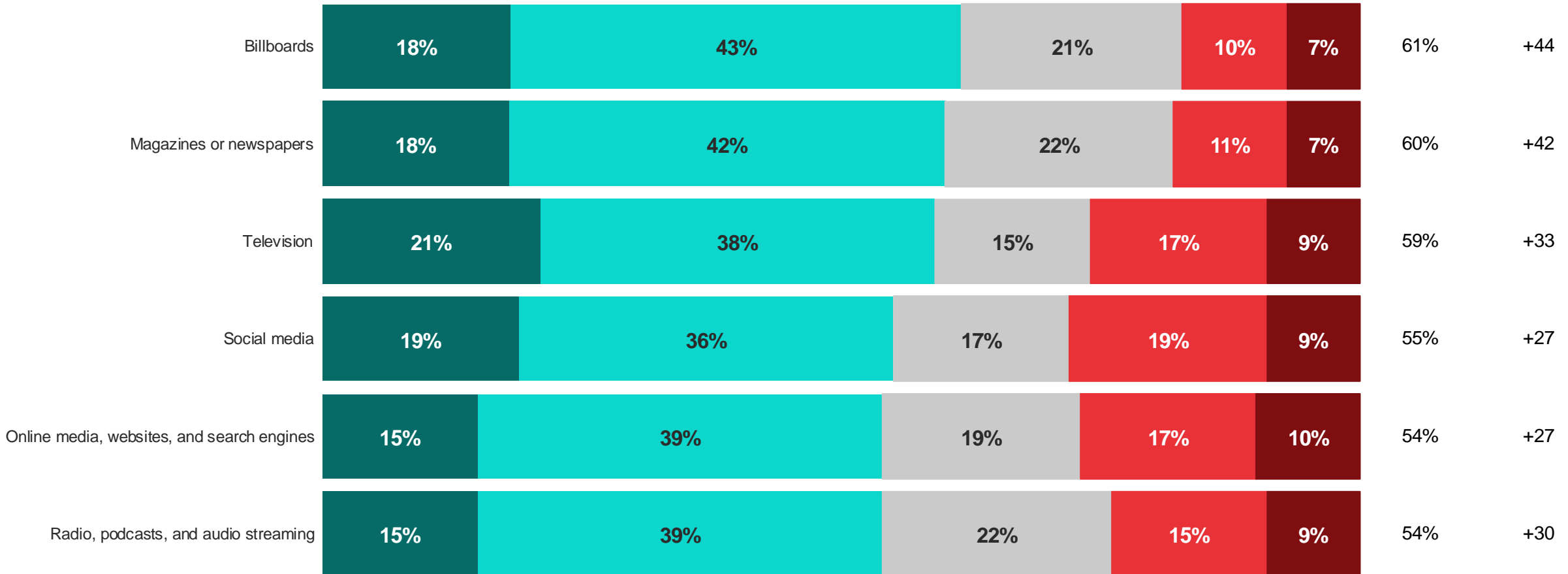
AWARENESS OF OOH ADVERTISING

The total favorability (+61%) and average net favorability of *Billboard ads* (+44) is higher than all other forms of media.

During your typical daily activities when you view or hear advertisements in the following locations or formats, do you have a favorable or unfavorable opinion towards the advertising?

● Very favorable
 ● Somewhat favorable
 ● Don't know/No opinion
 ● Somewhat unfavorable
 ● Very unfavorable

Total Favorable **Net Favorability**



Total Favorable = Very favorable + Somewhat favorable | Net Favorability = (Very favorable + Somewhat favorable) – (Very unfavorable + Somewhat unfavorable)

|
CONTENTS

TRAVEL MODES AND COMMUTING

AWARENESS OF OOH ADVERTISING

ENGAGEMENT WITH OOH ADVERTISING

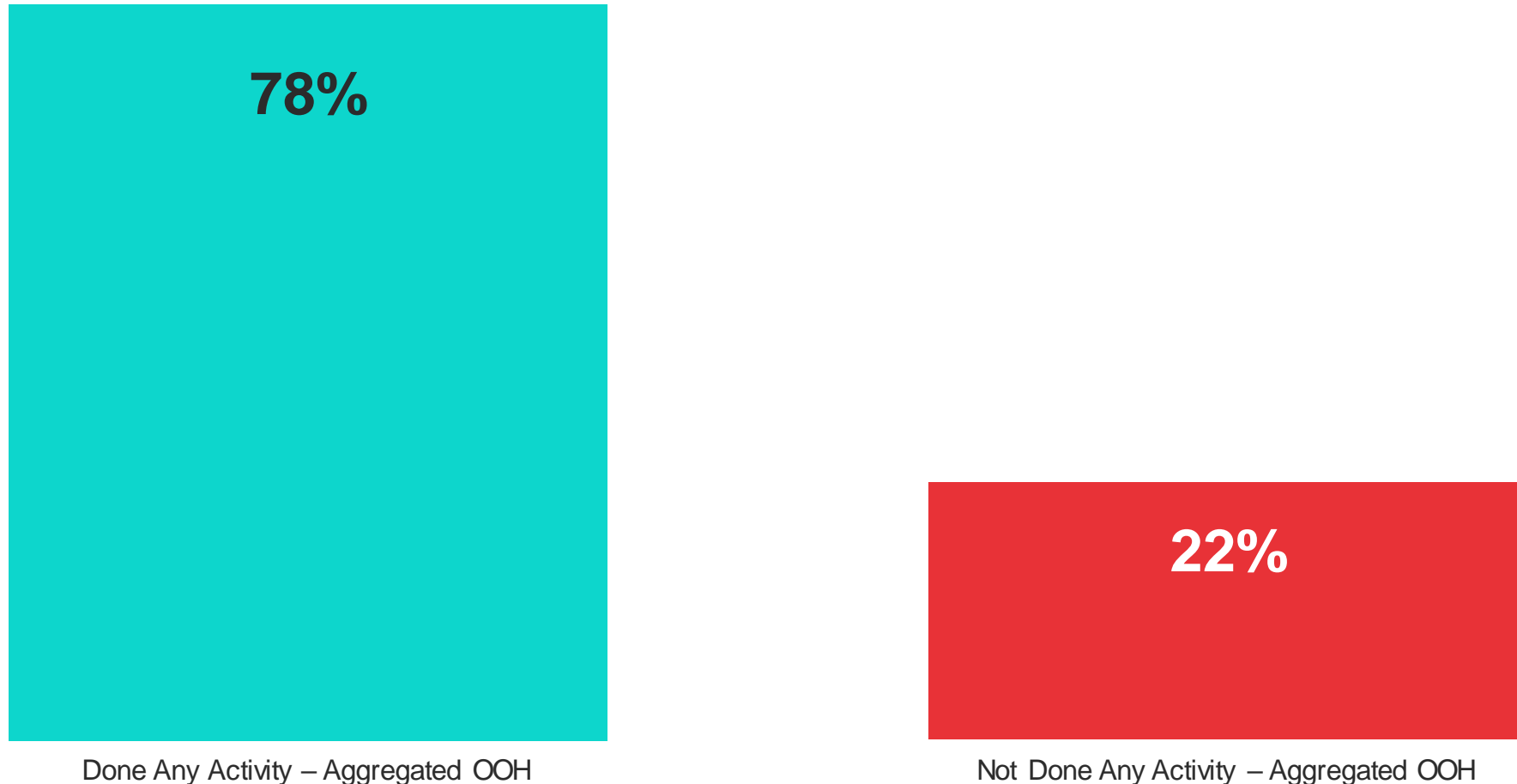
APPENDIX



ENGAGEMENT WITH OOH ADVERTISING

Four-in-five adults have *done at least one engagement activity* (78%) within the past 60 days after seeing an OOH ad.

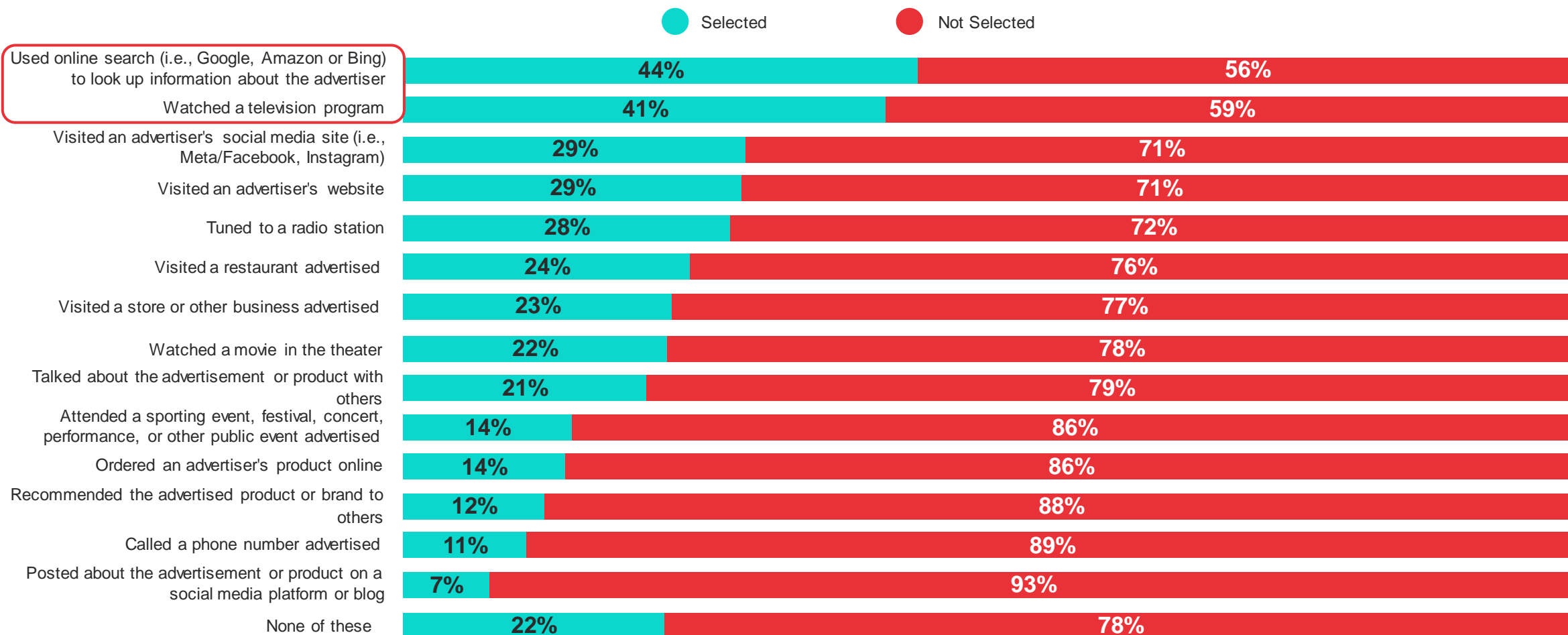
Have you recently, within the past 60 days, done any of the following activities after seeing any form of out of home advertising (including billboards, buses, bus stops, subways, airports, outdoor digital and video screens, posters, and other advertisement signage seen while outdoors)? Select all that apply.



ENGAGEMENT WITH OOH ADVERTISING

Two-in-five adults have *used an online search* (44%) or *watched a television program* (41%) within the past 60 days after seeing an OOH ad.

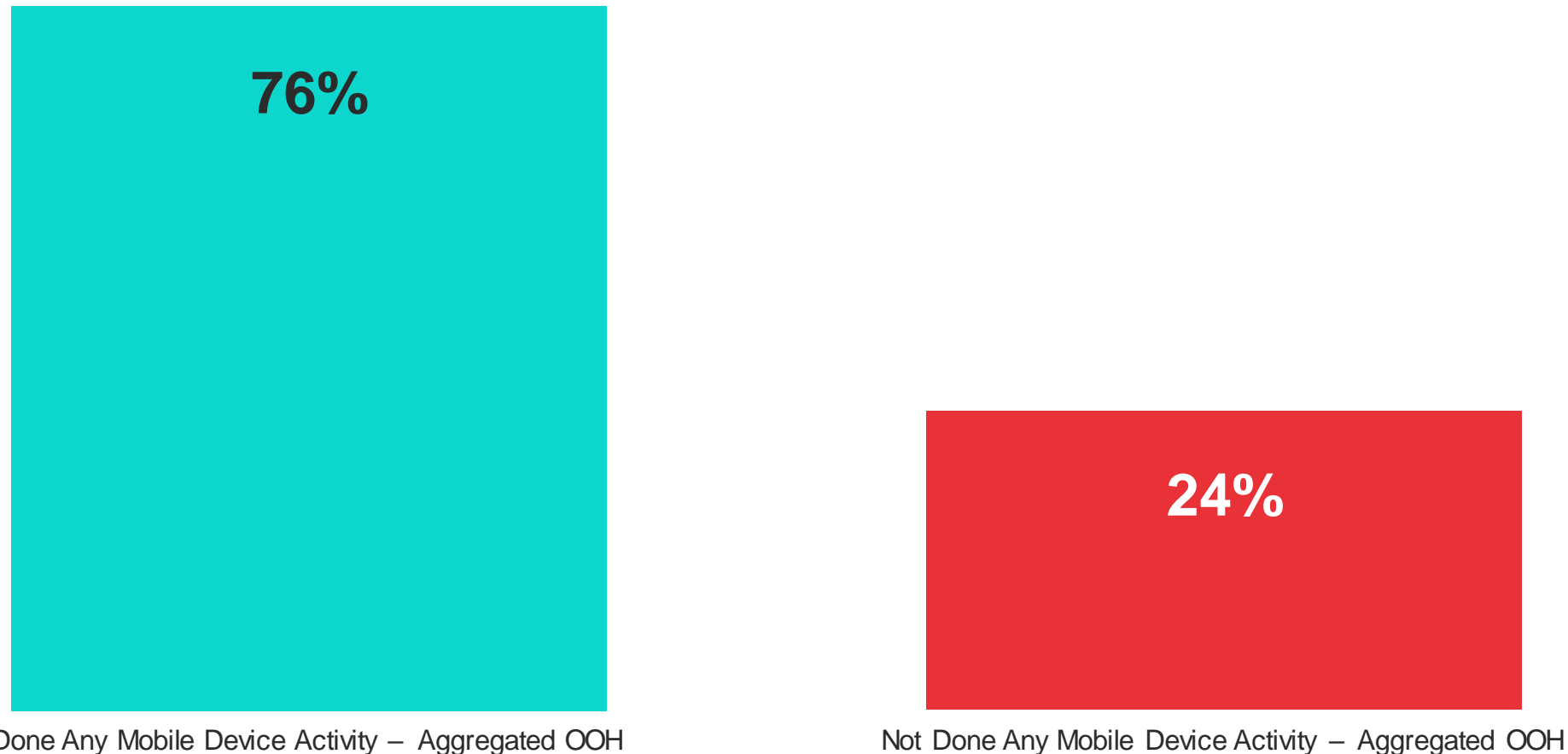
Have you recently, within the past 60 days, done any of the following activities after seeing any form of out of home advertising (including billboards, buses, bus stops, subways, airports, outdoor digital and video screens, posters, and other advertisement signage seen while outdoors)? Select all that apply.



ENGAGEMENT WITH OOH ADVERTISING

Three-fourths of adults have *done at least one engagement activity on their smartphone or mobile device* (76%) within the past 60 days after seeing an OOH ad.

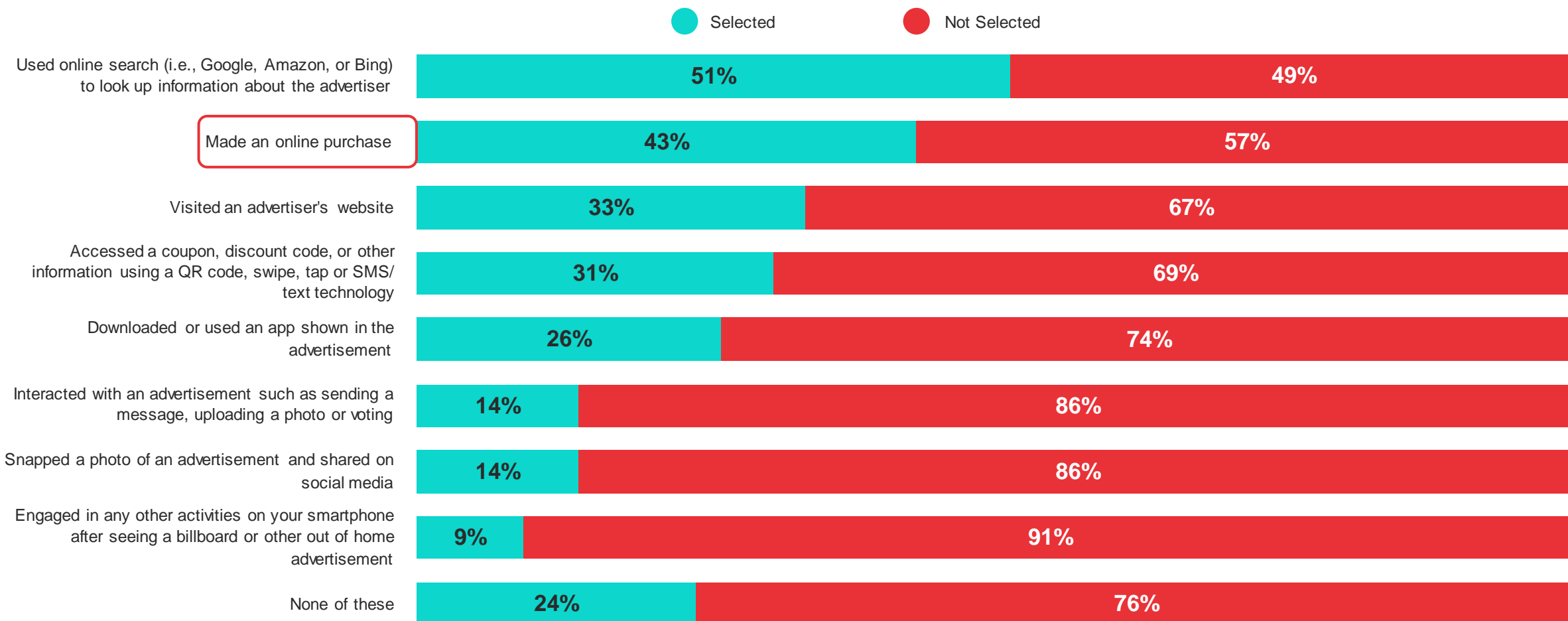
Have you recently, within the past 60 days, done any of the following activities on your smartphone or mobile device after seeing any form of out of home advertising? Select all that apply. **N = 1,430 ADULTS WHO USE A SMARTPHONE OR MOBILE DEVICE WITH INTERNET ACCESS, MOE = +/-2%**



ENGAGEMENT WITH OOH ADVERTISING

Two-in-five adults who use a smartphone or mobile device with internet access have *made an online purchase* (43%) within the past 60 days after seeing an OOH ad.

Have you recently, within the past 60 days, done any of the following activities on your smartphone or mobile device after seeing any form of out of home advertising? Select all that apply. **N = 1,430 ADULTS WHO USE A SMARTPHONE OR MOBILE DEVICE WITH INTERNET ACCESS, MOE = +/-2%**

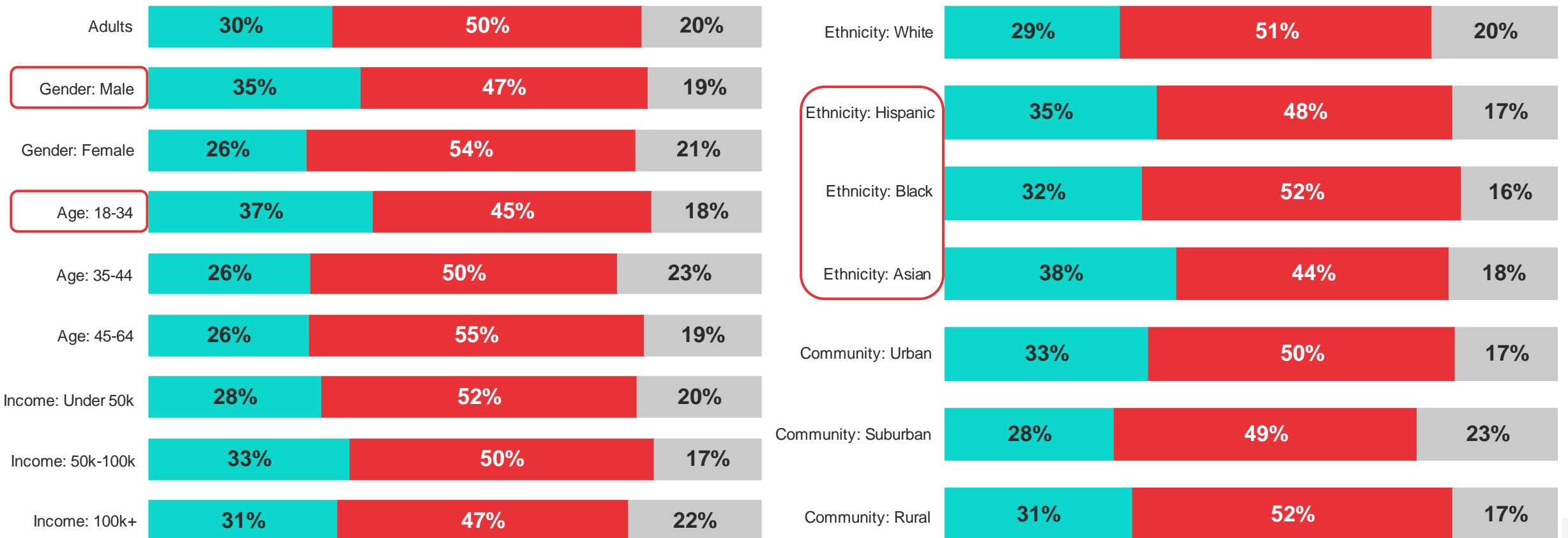


ENGAGEMENT WITH OOH ADVERTISING

Men (35%), adults 18-34 (37%), Asian (38%), Black (32%), and Hispanic (35%) adults are more likely to notice OOH ads within the past 60 days that gave them directions to a specific store, business, or restaurant location.

Have you recently, within the past 60 days, noticed an out of home advertisement that gave you directions to a specific store, business, or restaurant location?

Yes No Not sure

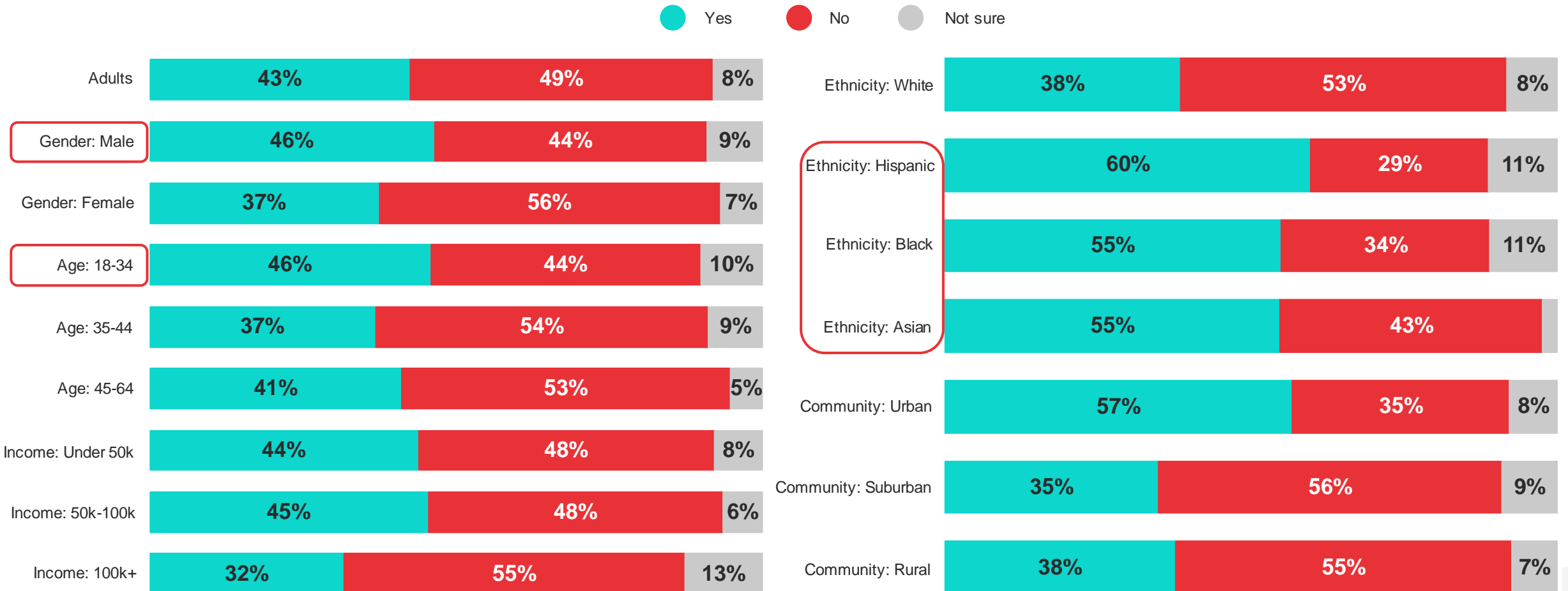


See appendix for full sample details and margin of error of each demographic group.

ENGAGEMENT WITH OOH ADVERTISING

Men (46%), adults 18-34 (46%), Asian (55%), Black (55%), and Hispanic (60%) adults are more likely to visit a business within 30 minutes of seeing an OOH ad.

As a result of the directional out of home advertisement you saw, did you visit the store, business, or restaurant within 30 minutes of seeing the advertisement? **N = 440 ADULTS WHO REPORT RECENTLY NOTICING AN OOH ADVERTISEMENT WITH DIRECTIONS, MOE = +/-5%**

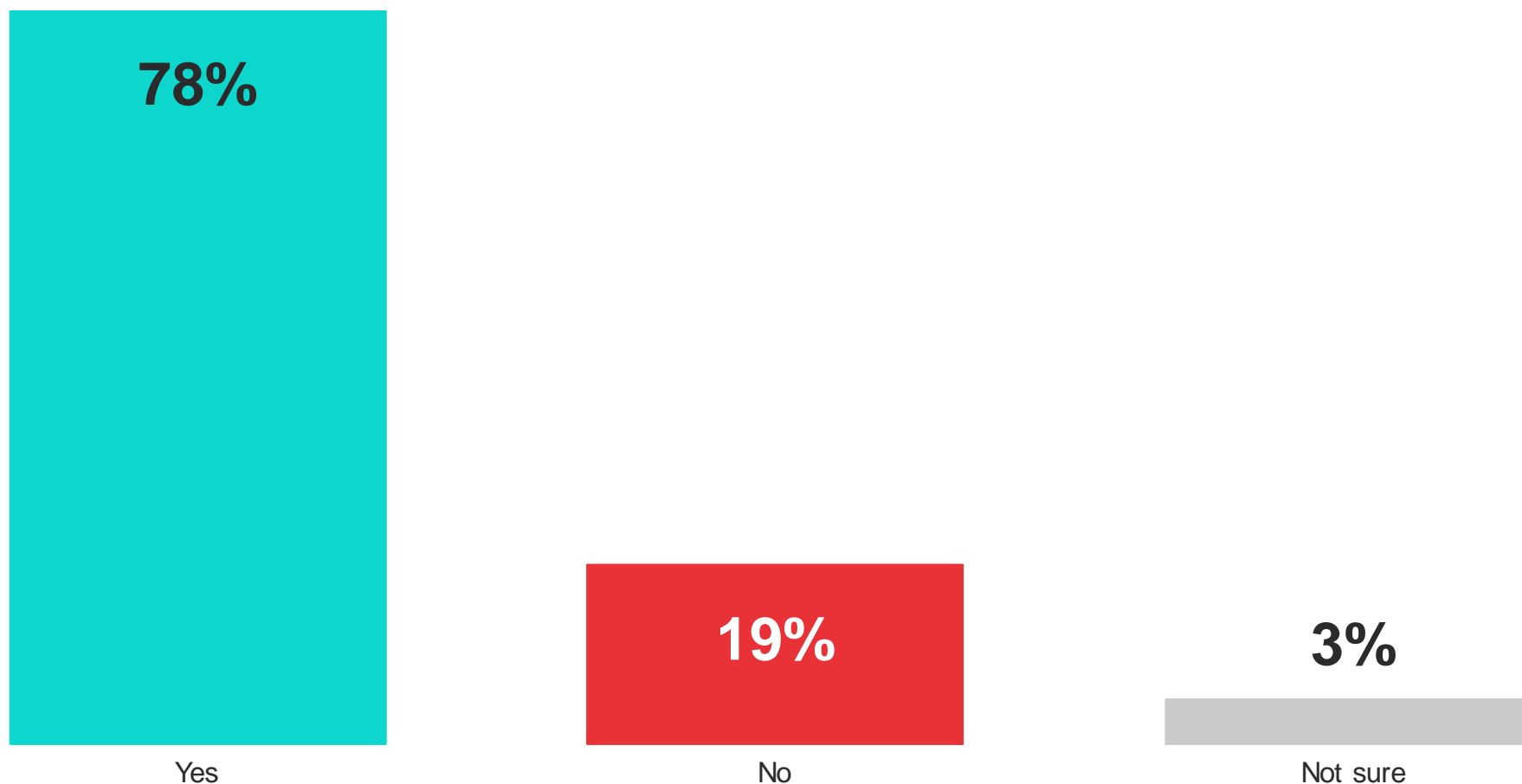


See appendix for full sample details and margin of error of each demographic group.

ENGAGEMENT WITH OOH ADVERTISING

Among adults who report having immediately visited a business after seeing an OOH ad, four-in-five (78%) made a purchase the last time they did this.

You indicated that you have immediately (within 30 minutes) visited a store, business, or restaurant specifically because you saw an out of home advertisement. The last time that you did this, did you make a purchase at that store, business, or restaurant? **N = 187 ADULTS WHO REPORT IMMEDIATELY VISITING A LOCATION AFTER NOTICING AN OOH ADVERTISEMENT WITH DIRECTIONS, MOE = +/-7%**



ENGAGEMENT WITH OOH ADVERTISING

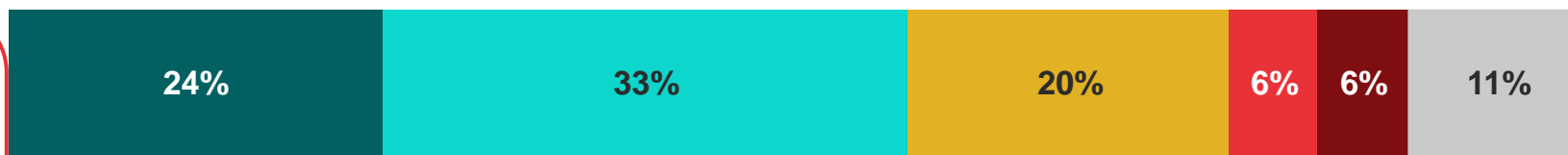
At least half of adults *strongly agree* or *somewhat agree* that they notice OOH ads more often when they are aligned with their needs and interests (57%) or tailored to the location they are in (54%).

Please indicate how strongly you agree or disagree with each of the statements below.

● Strongly agree
 ● Somewhat agree
 ● Neither agree nor disagree
 ● Somewhat disagree
 ● Strongly disagree
 ● Don't know/No opinion

Total Agree

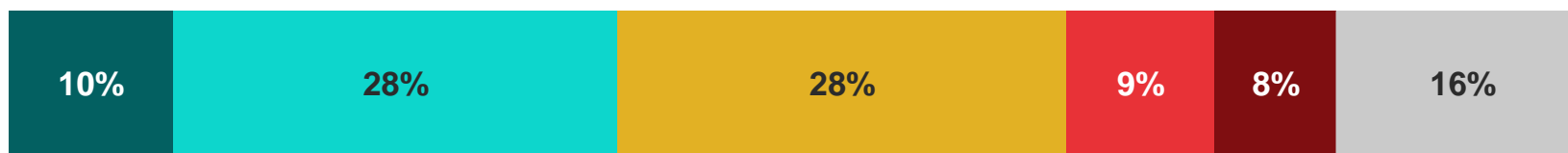
I notice out of home advertisements more often when they are aligned with my needs and interests.



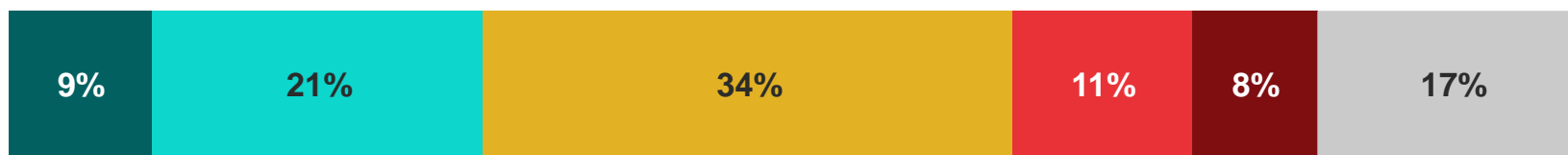
I notice out of home advertisements more often when they are tailored to the location that I am in.



I notice out of home advertisements more often when they are tailored to be specific to the current or upcoming weather conditions.



I notice out of home advertisements more often when they are tailored to be specific to the time of day.

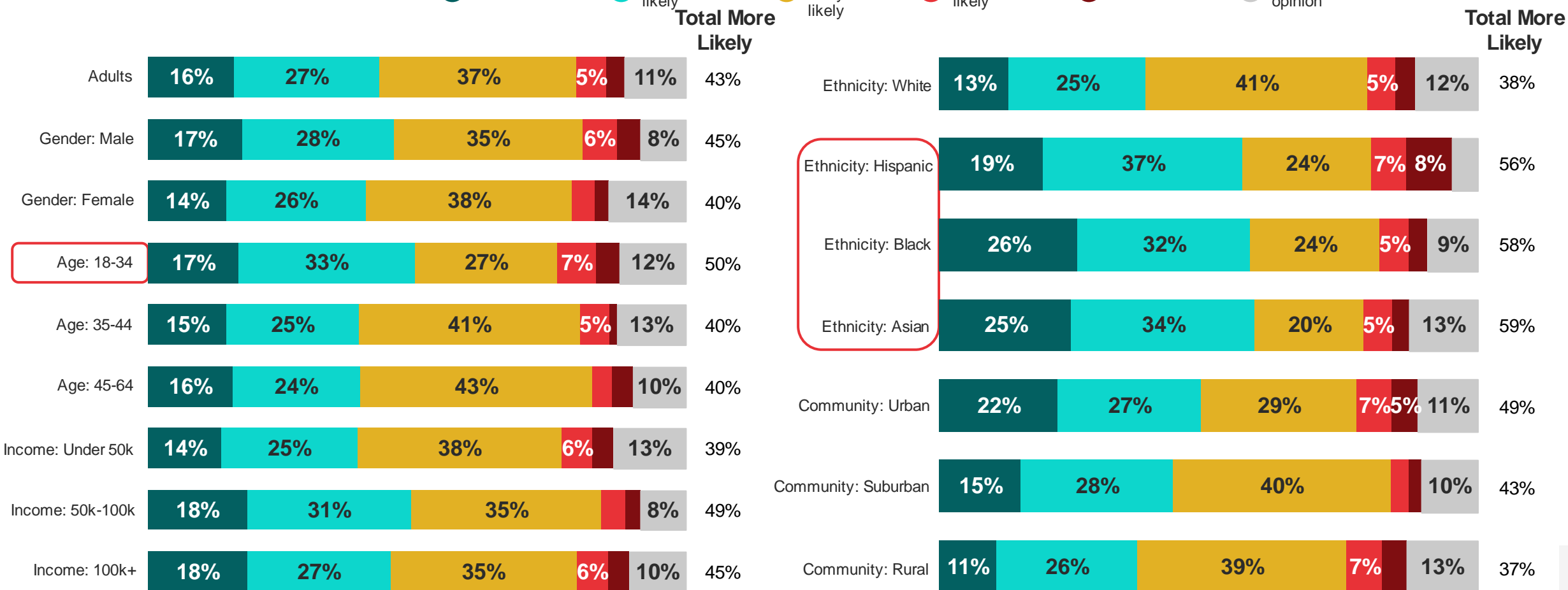


Total Agree = Strongly agree + Somewhat agree

ENGAGEMENT WITH OOH ADVERTISING

Three-in-five Black (58%) and Asian (59%) adults as well as at least half of Hispanic (56%) and younger (18-34: 50%) adults are *much more likely* or *somewhat more likely* to notice an OOH ad that reflected their cultural identity.

If you were to see an out of home advertisement that reflected your cultural identity, would you be more likely or less likely to notice the advertisement?



See appendix for full sample details and margin of error of each demographic group.

Total More Likely = Much more likely + Somewhat more likely

CONTENTS

TRAVEL MODES AND COMMUTING
AWARENESS OF OOH ADVERTISING
ENGAGEMENT WITH OOH ADVERTISING

APPENDIX



APPENDIX

Definitions of OOH ad formats.

Billboards - billboards, digital billboard or poster, posters

Place-Based - Printed signs, video screens, shopping malls, movie theater

Street Furniture - street level printed or digital, printed or digital ads in bus shelters

Transit - side of public bus, wrapped vehicles, mobile billboards, printed or digital ads in commuter rail or subway car/platform/station, ride share vehicles, taxis, airport

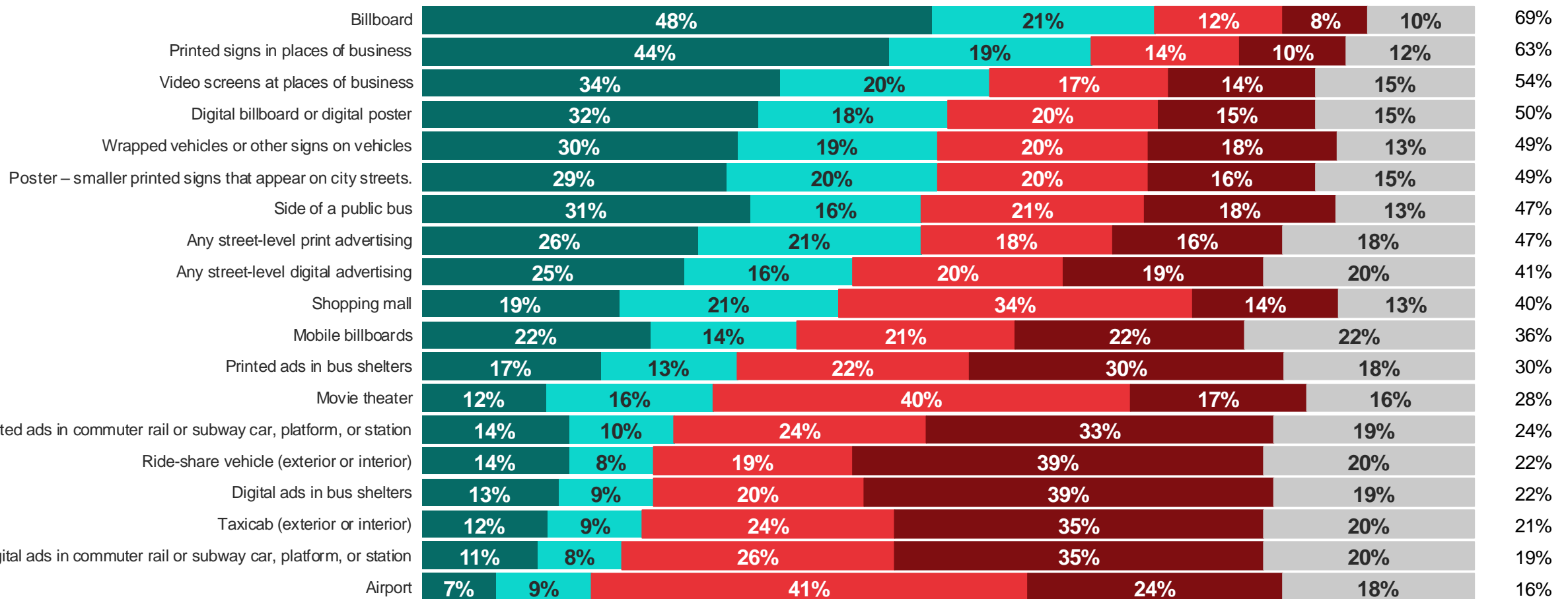
APPENDIX

In the past 30 days, at least three-in-five adults have noticed a *billboard* (69%) or a *printed sign* (63%). At least half of adults have noticed advertising on a *video screen* (54%), *digital billboard or poster* (50%), *wrapped vehicle* (49%), or *poster* (49%) in the past 30 days.

When was the last time you noticed advertising in each of the following types of out of home formats or environments?



Total In Past 30 Days

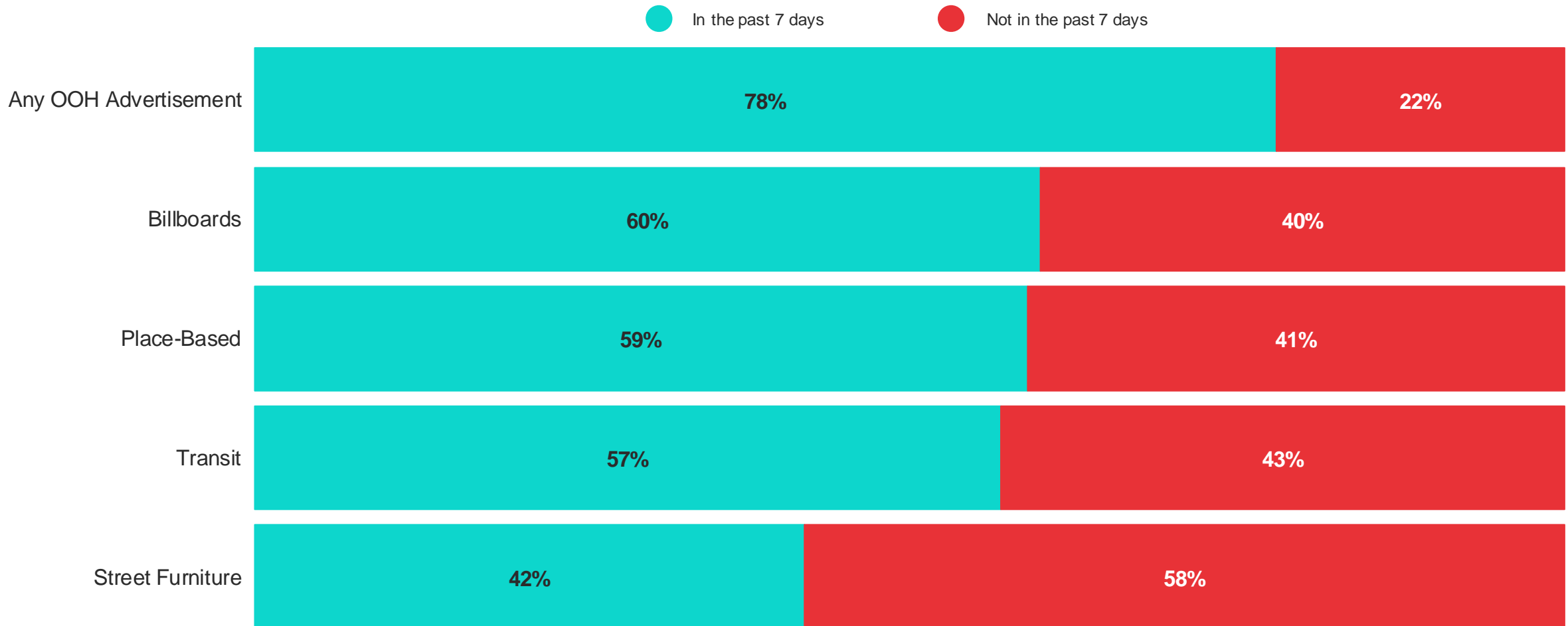


Total In Past 30 Days = In Past 7 Days + In Past 8 – 30 Days

APPENDIX

Three-fourths of adults (78%) have noticed *at least one format of OOH ads* in the past 7 days and over half of adults have noticed *billboard ads* (60%), *place-based ads* (59%), and *transit ads* (57%) in the past 7 days.

When was the last time you noticed advertising in each of the following types of out of home formats or environments?

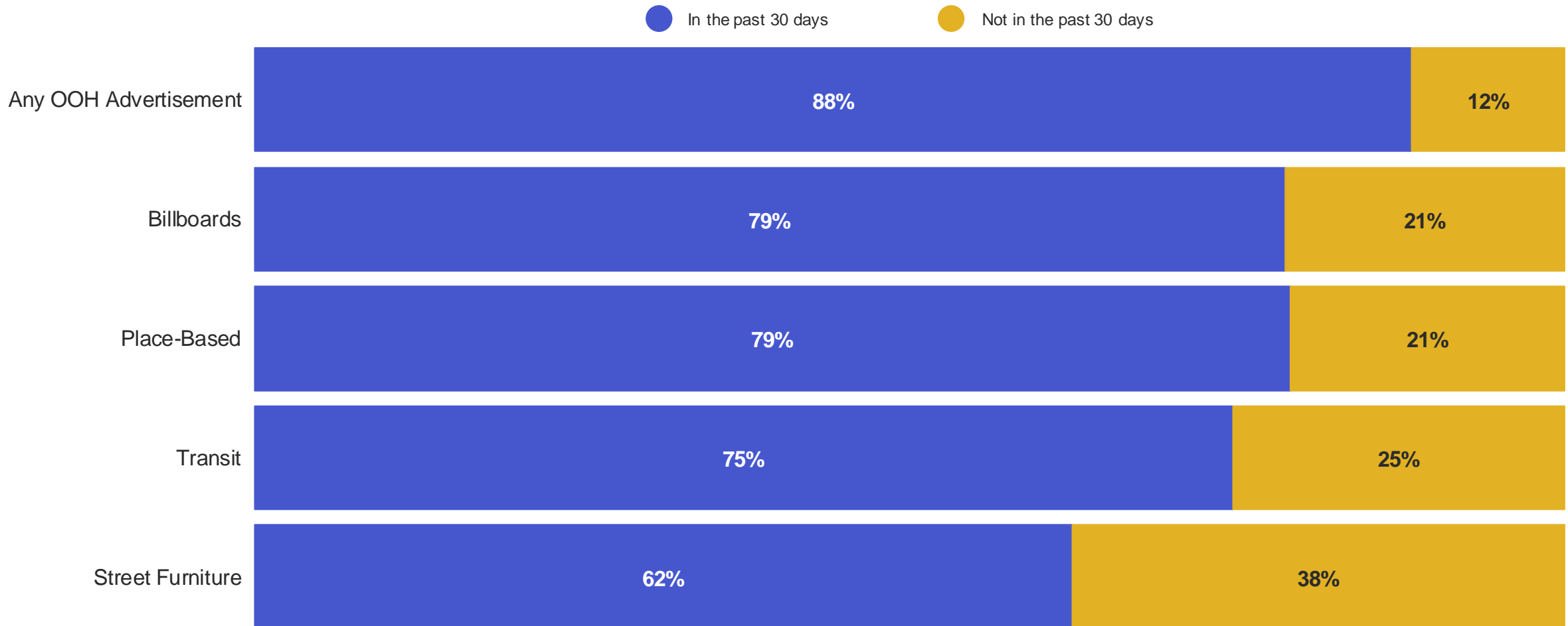


Data in charts reflects percent noticing each form of OOH advertisement in the past 7 days, see appendix for full sample details.

APPENDIX

Nearly nine-in-ten adults (88%) have noticed *at least one format of OOH ads* in the past 30 days. Four-in-five adults have noticed a format of *billboard* (79%) and *place-based* (79%) advertisements in the past 30 days.

When was the last time you noticed advertising in each of the following types of out of home formats or environments?

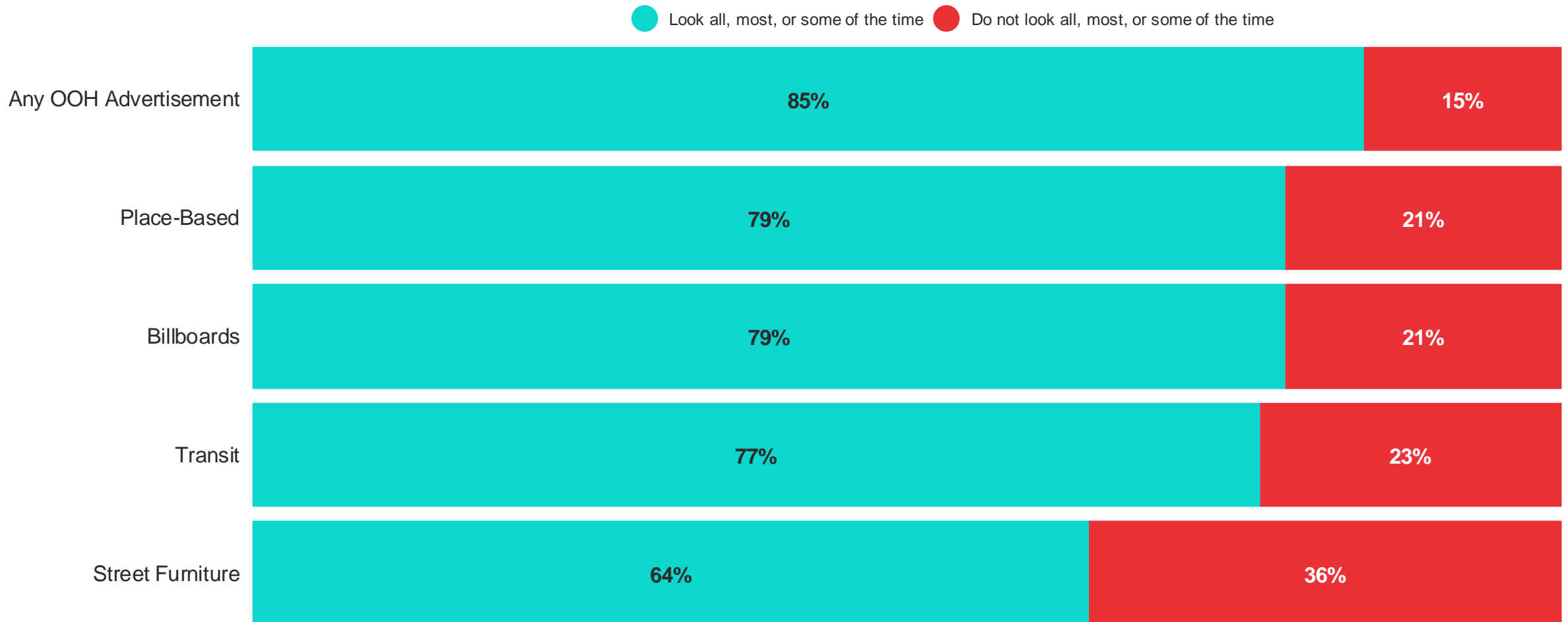


Data in charts reflects percent noticing each form of OOH advertisement in the past 30 days, see appendix for full sample details.

APPENDIX

Eighty-five percent of adults (85%) look at least one format of OOH ads *all the time, most of the time, or some of the time*. Four-in-five adults look at *place-based* (79%) and *billboard* (79%) advertisements while three-fourths look at *transit* (45%) advertisements *all, most, or some of the time*.

How often, if at all, do you look at advertising messages in each of the following out of home formats or environments?



Data in charts reflects percent looking at each form of OOH advertisement all, some, or most of the time, see appendix for full sample details.

APPENDIX

OOH Viewership

Noticed OOH Media in Past 30 Days	U.S.	Ethnicity				Age			Income Level
	Adults	White	Hispanic	Black	Asian	18-34	35-44	45-64	100k+
Total OOH	88%	88%	91%	88%	92%	93%	90%	83%	93%
Billboard	69%	70%	65%	66%	72%	70%	72%	67%	76%
Printed signs in businesses	63%	64%	54%	57%	66%	64%	67%	62%	73%
Video screens at places of business	54%	52%	53%	60%	66%	60%	58%	47%	66%
Digital billboard or digital poster	50%	49%	46%	55%	48%	53%	52%	46%	61%
Poster	49%	48%	48%	55%	52%	51%	55%	44%	59%
Wrapped vehicles or other signs on vehicles	49%	49%	47%	49%	37%	49%	51%	47%	58%
Any street-level print advertising such as sidewalk kiosks or displays	47%	45%	49%	54%	52%	49%	49%	44%	52%
Side of a public bus	47%	45%	47%	60%	48%	46%	53%	47%	59%
Any street-level digital advertising such as sidewalk kiosks or displays	41%	40%	45%	46%	45%	48%	39%	35%	47%
Shopping mall	40%	37%	47%	44%	55%	49%	41%	31%	47%
Mobile billboards	36%	34%	37%	40%	43%	39%	38%	32%	49%
Printed ads in bus shelters	30%	26%	37%	40%	39%	32%	33%	26%	37%
Movie theater	28%	25%	39%	33%	37%	37%	26%	20%	32%
Printed ads in commuter rail or subway car, platform, or station	24%	19%	33%	40%	44%	30%	23%	19%	31%
Ride-share vehicle (exterior or interior)	22%	18%	25%	36%	20%	27%	23%	17%	29%
Digital ads in bus shelters	22%	19%	30%	31%	26%	26%	22%	18%	27%
Taxicab (exterior or interior)	21%	19%	30%	32%	21%	25%	20%	18%	24%
Digital ads in commuter rail or subway car, platform, or station	19%	15%	27%	32%	26%	26%	20%	14%	24%
Airport	16%	15%	21%	18%	24%	21%	21%	10%	24%

Data in chart reflects percent of each group noticing each form of advertisement in the past 30 days, see appendix for full sample details.

APPENDIX

OOH Viewership Indexed

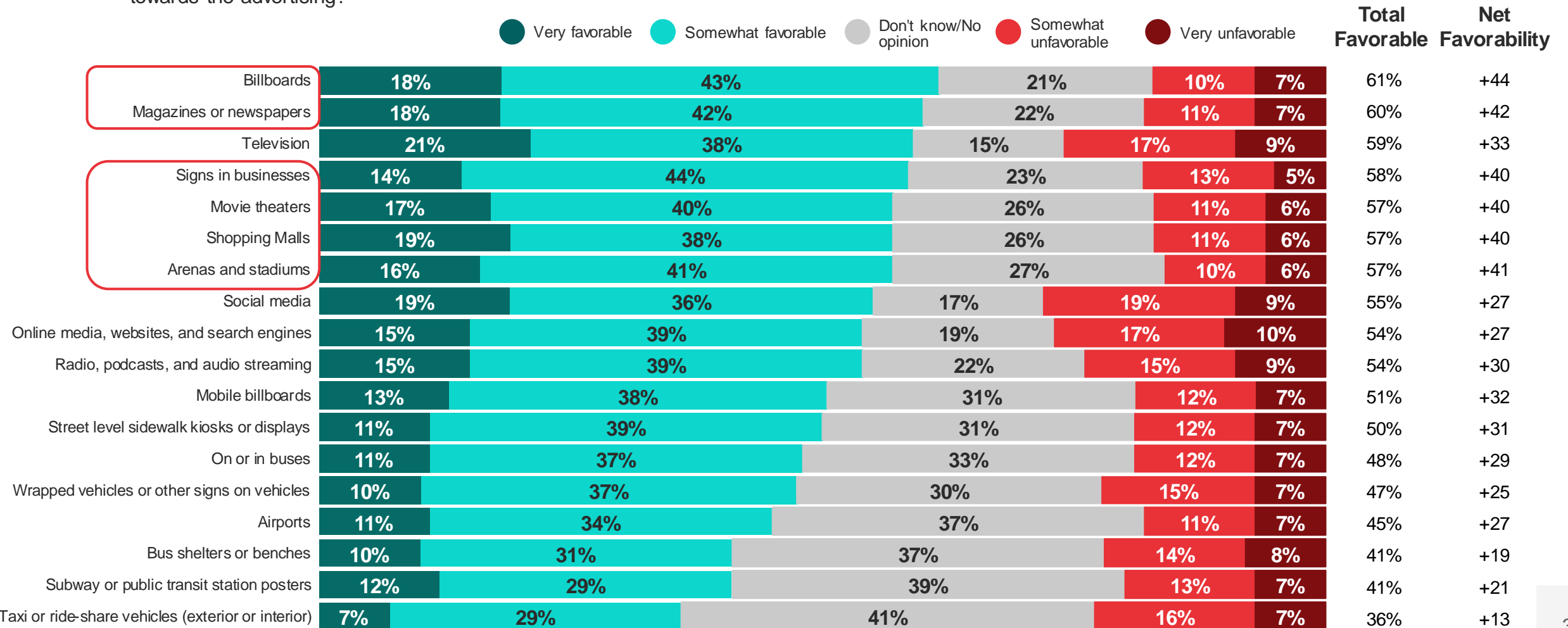
Noticed OOH Media in Past 30 Days	U.S.	Ethnicity				Age			Income Level
	Adults	White	Hispanic	Black	Asian	18-34	35-44	45-64	100k+
Total OOH	100	100	103	100	104	105	102	94	105
Billboard	100	101	94	96	104	101	104	97	110
Printed signs in businesses	100	102	86	90	105	102	106	98	116
Video screens at places of business	100	96	98	111	122	111	107	87	122
Digital billboard or digital poster	100	98	92	110	96	106	104	92	122
Poster	100	98	98	112	106	104	112	90	120
Wrapped vehicles or other signs on vehicles	100	100	96	100	76	100	104	96	118
Any street-level print advertising such as sidewalk kiosks or displays	100	96	104	115	111	104	104	94	111
Side of a public bus	100	96	100	128	102	98	113	100	126
Any street-level digital advertising such as sidewalk kiosks or displays	100	98	110	112	110	117	95	85	115
Shopping mall	100	93	118	110	138	123	103	78	118
Mobile billboards	100	94	103	111	119	108	106	89	136
Printed ads in bus shelters	100	87	123	133	130	107	110	87	123
Movie theater	100	89	139	118	132	132	93	71	114
Printed ads in commuter rail or subway car, platform, or station	100	79	138	167	183	125	96	79	129
Ride-share vehicle (exterior or interior)	100	82	114	164	91	123	105	77	132
Digital ads in bus shelters	100	86	136	141	118	118	100	82	123
Taxicab (exterior or interior)	100	90	143	152	100	119	95	86	114
Digital ads in commuter rail or subway car, platform, or station	100	79	142	168	137	137	105	74	126
Airport	100	94	131	113	150	131	131	63	150

Data in chart reflects an index of each group noticing each form of advertisement in the past 30 days, see appendix for full sample details.

AWARENESS OF OOH ADVERTISING

Advertisements on *billboards* (+44), in *magazines/newspapers* (+42), in *arenas/stadiums* (+41) and in *businesses, movie theaters, and shopping malls* (+40) have the highest net favorability among adults.

During your typical daily activities when you view or hear advertisements in the following locations or formats, do you have a favorable or unfavorable opinion towards the advertising?



Total Favorable = Very favorable + Somewhat favorable | Net Favorability = (Very favorable + Somewhat favorable) - (Very unfavorable + Somewhat unfavorable)

AWARENESS OF OOH ADVERTISING

OOH Favorability

During your typical daily activities when you view or hear advertisements in the following locations or formats, do you have a favorable or unfavorable opinion towards the advertising?

OOH Media Favorability	U.S.	Ethnicity				Age			Income Level
	Adults	White	Hispanic	Black	Asian	18-34	35-44	45-64	100k+
Billboards	61%	60%	63%	67%	61%	60%	61%	63%	71%
Magazines or newspapers	60%	59%	66%	63%	58%	58%	56%	63%	63%
Television	59%	56%	66%	79%	55%	55%	60%	61%	63%
Signs in places of business	58%	57%	64%	72%	56%	59%	57%	60%	61%
Movie theater	57%	54%	63%	67%	65%	61%	57%	53%	60%
Shopping Malls	57%	54%	61%	66%	56%	58%	54%	56%	60%
Arenas and stadiums	57%	56%	62%	64%	56%	58%	58%	56%	66%
Social media	55%	51%	57%	69%	70%	61%	54%	49%	55%
Online media, websites, and search engines	54%	50%	65%	68%	71%	59%	52%	50%	57%
Radio, podcasts, and audio streaming	54%	51%	60%	72%	58%	57%	52%	53%	57%
Mobile billboards	51%	49%	65%	59%	57%	50%	49%	53%	57%
Street level sidewalk kiosks or displays	50%	47%	56%	58%	56%	51%	43%	52%	57%
On or in buses	48%	44%	56%	63%	52%	47%	43%	50%	56%
Wrapped vehicles or other signs on vehicles	47%	45%	54%	63%	46%	49%	45%	49%	50%
Airports	45%	44%	50%	53%	45%	45%	44%	46%	59%
Bus shelters or benches	41%	38%	48%	52%	53%	40%	41%	43%	44%
Subway or public transit station posters	41%	38%	48%	50%	52%	41%	40%	41%	46%
Taxi or ride-share vehicles (exterior or interior)	36%	34%	46%	43%	42%	35%	33%	37%	40%

Data in heatmap reflects percent of each group expressing each form of advertisement as very favorable or somewhat favorable and is compared among each demographic group, see appendix for full sample details.

AWARENESS OF OOH ADVERTISING

OOH Favorability Indexed

During your typical daily activities when you view or hear advertisements in the following locations or formats, do you have a favorable or unfavorable opinion towards the advertising?

OOH Media Favorability Index	U.S.	Ethnicity				Age			Income Level
	Adults	White	Hispanic	Black	Asian	18-34	35-44	45-64	100k+
Billboards	100	98	103	110	100	98	100	103	116
Magazines or newspapers	100	98	110	105	97	97	93	105	105
Television	100	95	112	134	93	93	102	103	107
Signs in places of business	100	98	110	124	97	102	98	103	105
Movie theater	100	95	111	118	114	107	100	93	105
Shopping Malls	100	95	107	116	98	102	95	98	105
Arenas and stadiums	100	98	109	112	98	102	102	98	116
Social media	100	93	104	125	127	111	98	89	100
Online media, websites, and search engines	100	93	120	126	131	109	96	93	106
Radio, podcasts, and audio streaming	100	94	111	133	107	106	96	98	106
Mobile billboards	100	96	127	116	112	98	96	104	112
Street level sidewalk kiosks or displays	100	94	112	116	112	102	86	104	114
On or in buses	100	92	117	131	108	98	90	104	117
Wrapped vehicles or other signs on vehicles	100	96	115	134	98	104	96	104	106
Airports	100	98	111	118	100	100	98	102	131
Bus shelters or benches	100	93	117	127	129	98	100	105	107
Subway or public transit station posters	100	93	117	122	127	100	98	100	112
Taxi or ride-share vehicles (exterior or interior)	100	94	128	119	117	97	92	103	111

Data in chart reflects an index of each group expressing each form of advertisement as very favorable or somewhat favorable and is compared among each demographic group, see appendix for full sample details.

AWARENESS OF OOH ADVERTISING

OOH Favorability Indexed

During your typical daily activities when you view or hear advertisements in the following locations or formats, do you have a favorable or unfavorable opinion towards the advertising?

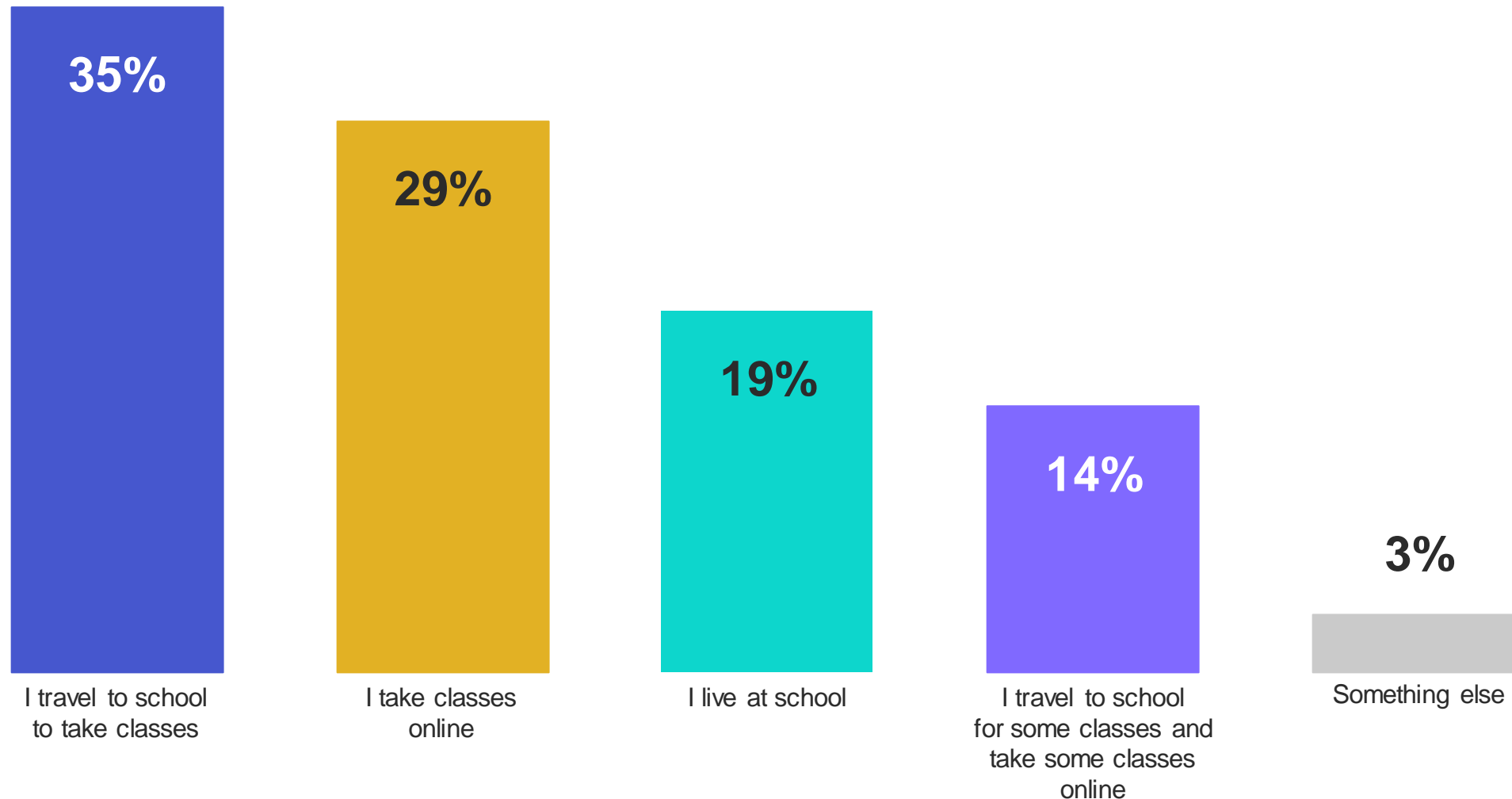
OOH Media Favorability Index	U.S.	Ethnicity				Age			Income Level
	Adults	White	Hispanic	Black	Asian	18-34	35-44	45-64	100k+
Any OOH Advertisement	100	96	114	120	108	100	96	102	112
Magazines or newspapers	100	98	110	105	97	97	93	105	105
Television	100	95	112	134	93	93	102	103	107
Online media, websites, and search engines (banner, display, and video ads)	100	93	120	126	131	109	96	93	106
Radio, podcasts, and audio streaming	100	94	111	133	107	106	96	98	106
Social media	100	93	104	125	127	111	98	89	100

Data in chart reflects an index of each group expressing each form of advertisement as very favorable or somewhat favorable and is compared among each demographic group, any OOH advertisements reflect average across each format of OOH advertisement, see appendix for full sample details.

APPENDIX

One-third of students travel to school to take classes (35%), three-in-ten take classes online (29%), and one-fifth live at school (19%).

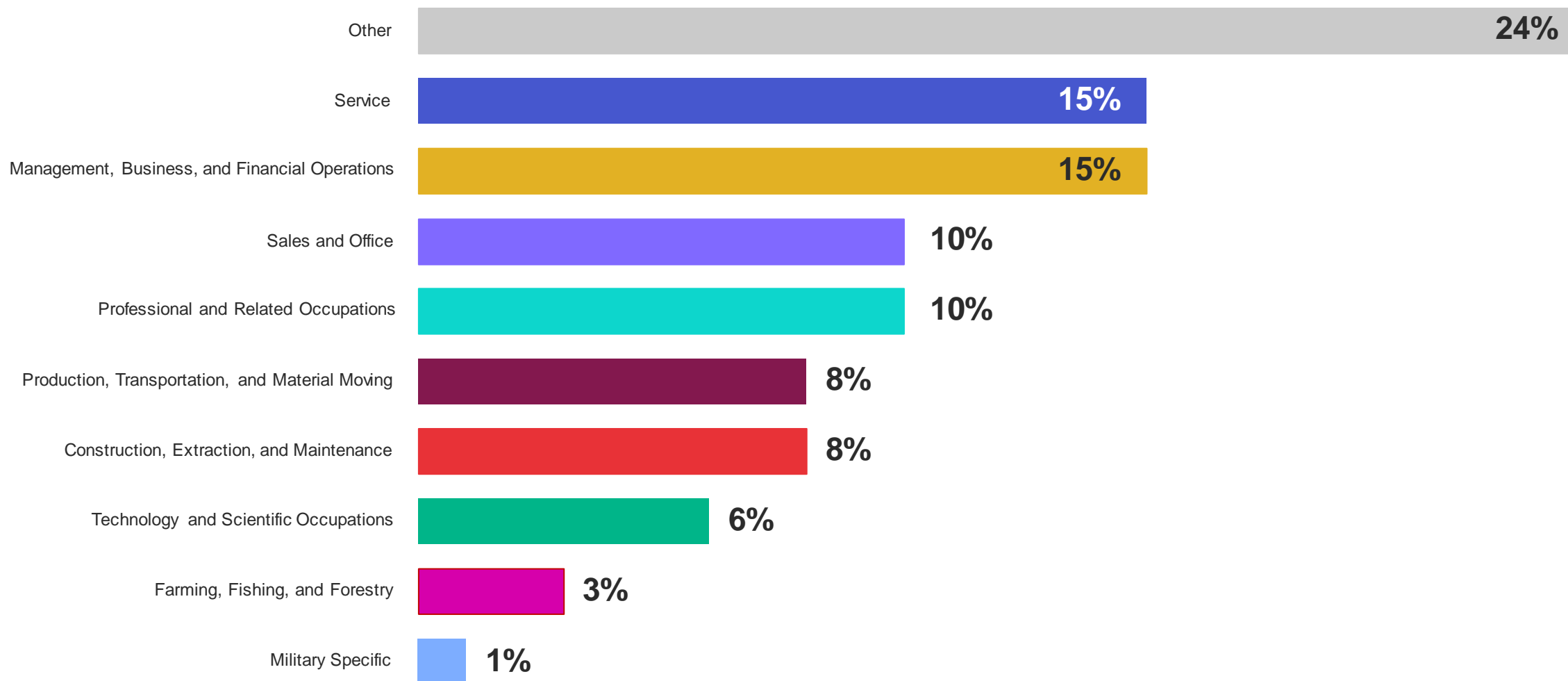
Which statement best describes your educational environment, even if none are exactly correct? **N = 105 ADULTS WHO ARE STUDENTS, MOE = +/-10%**



APPENDIX

Breakdown of current occupations among adults.

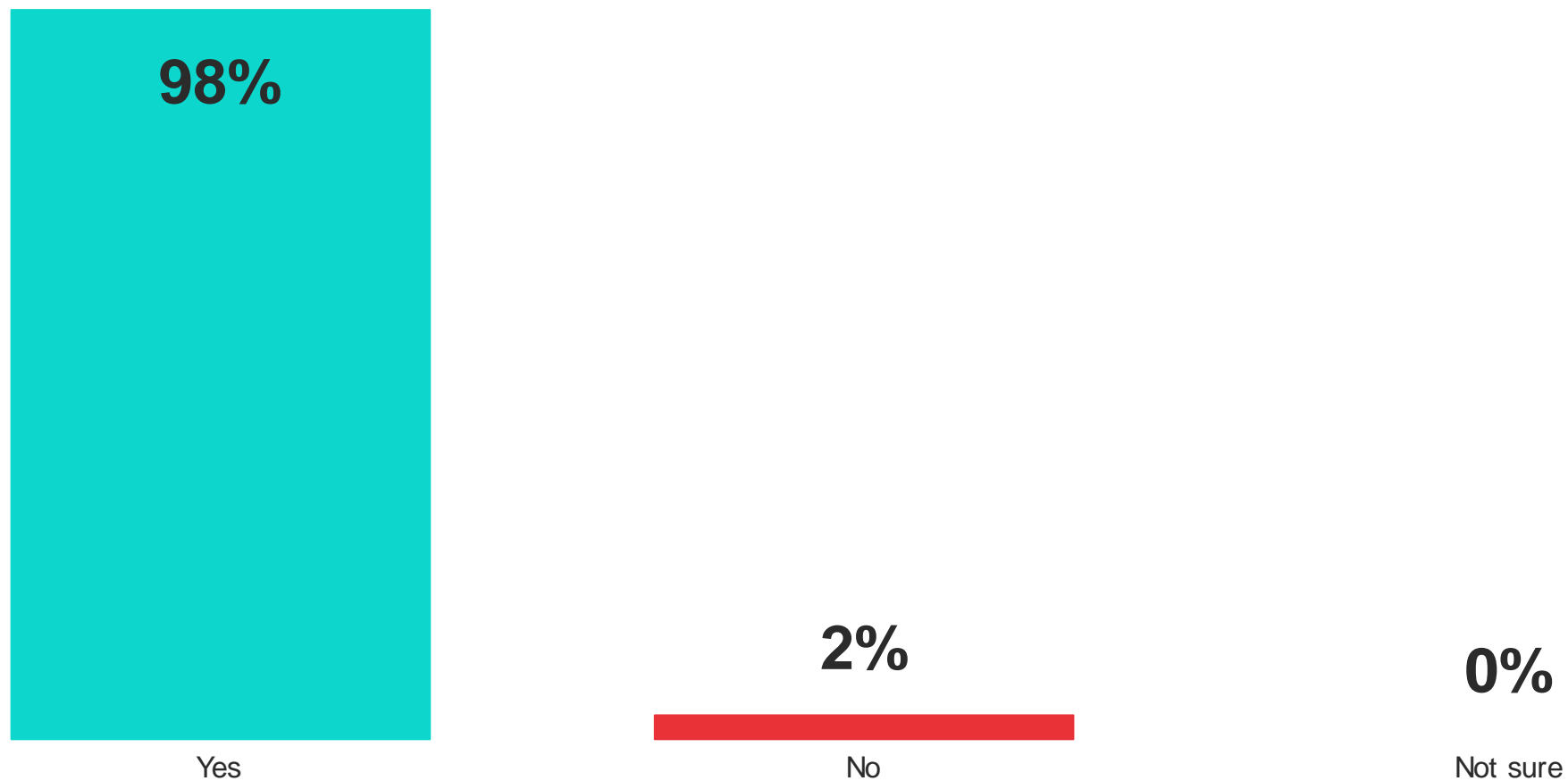
Which of the following best describes your current occupation, even if none are exactly correct? **N = 805 ADULTS WHO ARE EMPLOYED, MOE = +/-3%**



APPENDIX

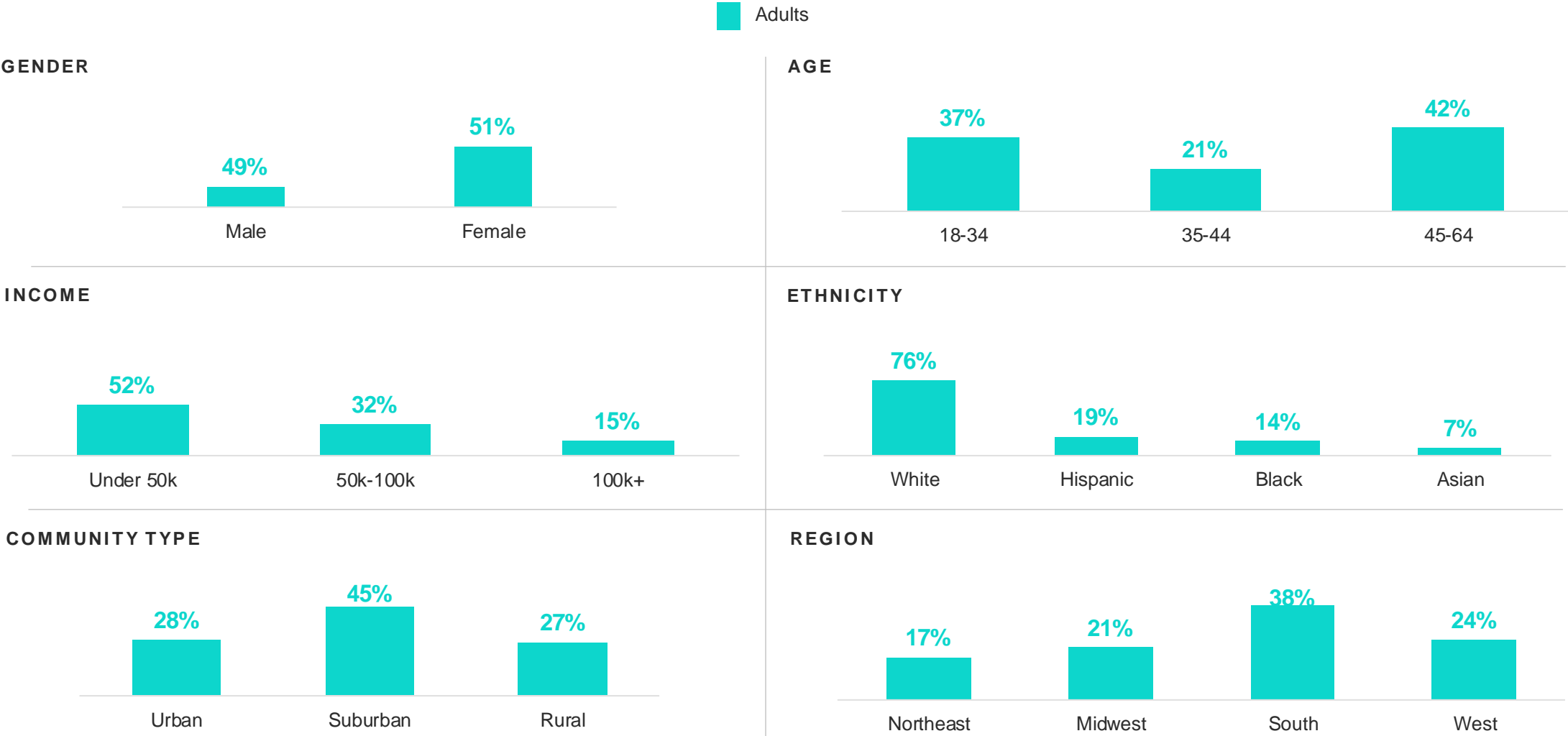
The vast majority of adults (98%) use a smartphone or other mobile device with internet access.

Do you use a smartphone or other mobile device with internet access?



APPENDIX

Breakdown of key demographics among respondents.



Percentages calculated as N size out of total respondents (N = 1,914).

APPENDIX

Breakdown of key demographics among respondents.

<i>Demo</i>	<i>N Size</i>	<i>MOE</i>
Adults	1,461	3%
Age: 18-34	545	4%
Age: 35-44	307	6%
Age: 45-64	609	4%
Income: Under 50k	765	4%
Income: 50k-100k	474	5%
Income: 100k+	223	7%

<i>Demo</i>	<i>N Size</i>	<i>MOE</i>
Gender: Male	719	4%
Gender: Female	742	4%
Ethnicity: White	1,107	3%
Ethnicity: Hispanic	275	6%
Ethnicity: Black	199	7%
Ethnicity: Asian	99	10%
Community: Urban	413	5%
Community: Suburban	652	4%
Community: Rural	397	5%

 MORNING CONSULT®

 oaaa

Out of Home Advertising Association of America

“OOH Advertising Study” was sponsored by The Foundation for Outdoor Advertising Research and Education (FOARE), a 501 (c) (3) not for profit, charitable organization