



Out of Home Advertising Association of America

# Maximizing OOH in Today's Marketplace

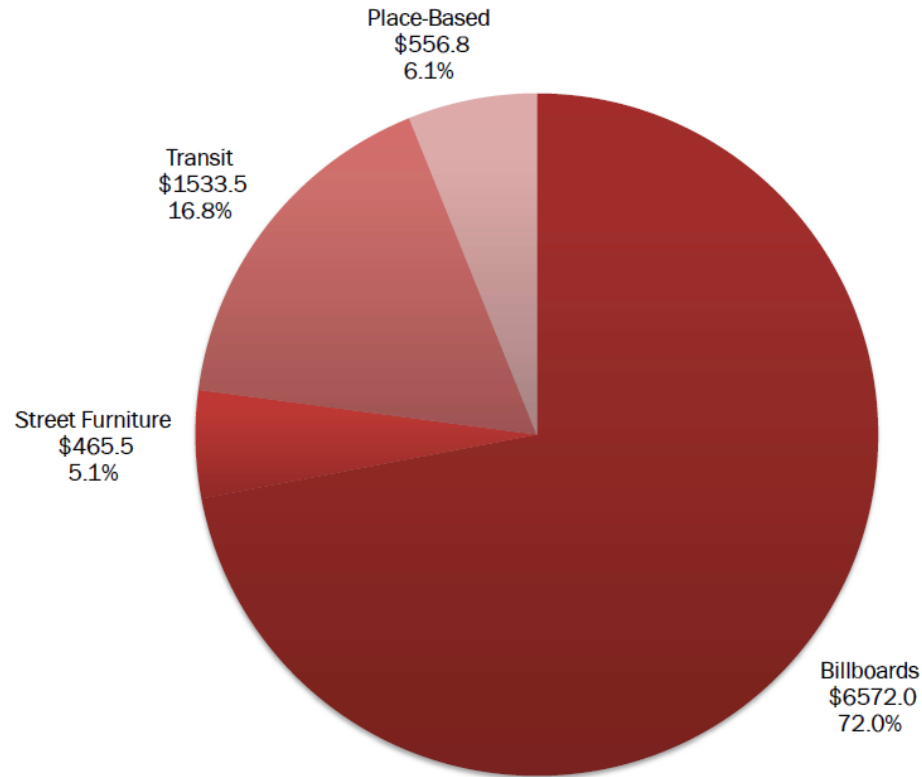
## Key 2025 Trends & Consumer Insights

## OOH Industry Growth



# 2024 OOH Ad Spend Grew 4.5% to \$9.13 Billion

2024 YE  
Total OOH Revenue \$9.13 Billion



## 2024 Category Performance vs. 2023

- Billboards +3.6%
- Street Furniture +5.0%
- Transit +10.6%
- Place-Based -1.6%

+7.5%

DOOH Growth

Digital OOH represents 34% of total OOH, format figures in millions.  
Source: OAAA

# 2024 OOH Ad Spend: Top 25 Product Categories

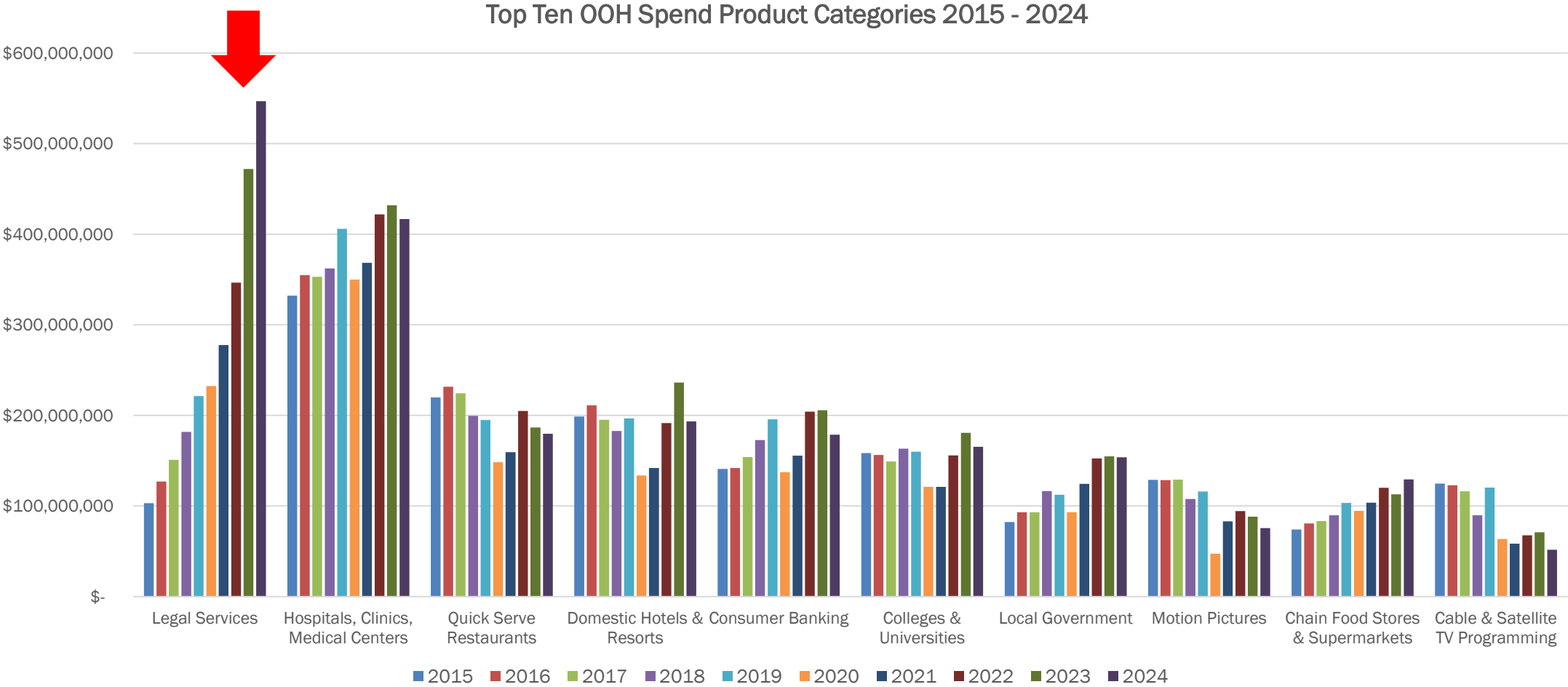
1. Legal Services
2. Hospitals, Clinics & Medical Centers
3. Domestic Hotels & Resorts
4. Quick Serve Restaurants
5. Consumer Banking
6. Colleges & Universities
7. Local Government
8. Chain Food Stores & Supermarkets
9. Television & Cable TV
10. Live Theater, Opera, Music, Dance
11. Fuel Suppliers, Plumbing & HVAC Services
12. Architects, Contractors, Engineers
13. Religious, Charitable & Humanitarian Organizations
14. Computer Software (excl games, education)
15. Wireless Telecom Providers
16. Miscellaneous Organizations
17. Real Estate Agents, Agencies & Brokers
18. Medical & Dental Insurance
19. Local Amusements & Events
20. Apparel
21. Online & Mobile Travel Services
22. Motion Pictures
23. Domestic Tourism
24. Local Restaurants
25. Wireless Home/Business Phone Equipment & Systems

The top 25 product categories account for 53% of total OOH spend



Source: MediaRadar

# OOH Ad Spend: Product Category Trends 2015 - 2024



NOTE: OAAA estimates Vivvix under reports OOH spend by approximately 30%, so data in this chart is best used for longitudinal analysis.

Source: MediaRadar

# 2024 Top Ten OOH Advertisers and Parent Companies

## Advertisers

- Apple
- McDonald's
- Amazon
- Coca-Cola
- Verizon
- Disney
- Morgan & Morgan Attorneys
- Hotels.com
- Google
- Samsung



*Access the full 2024 MegaBrands report [here](#)*

## Parent Companies

- Walt Disney Company
- Comcast Corp.
- Expedia Inc.
- Apple Inc.
- McDonald's Corp.
- Amazon.com Inc.
- Paramount Global
- Coca-Cola Co.
- LVMH Moët Hennessy Louis Vuitton SA
- Verizon Communications Inc.

Source: MediaRadar

# MAGNA: OOH Outperforms All Non-Digital Channels 2024 - 2025

## 2024

- Total media = + 9.9%
- OOH = +5.0%

## 2025 MAGNA Forecast

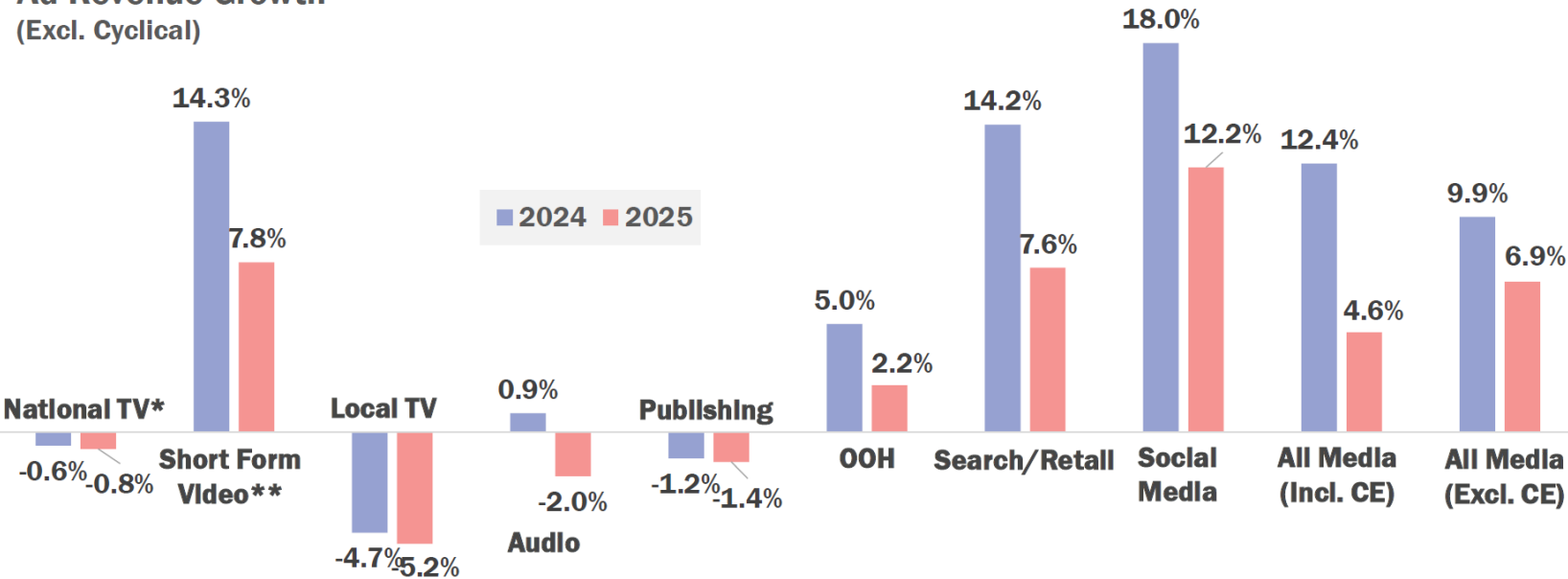
- Total media = +6.9%
- OOH growth = +2.2%

M/GNA

US Ad Forecast (Summer 2025)

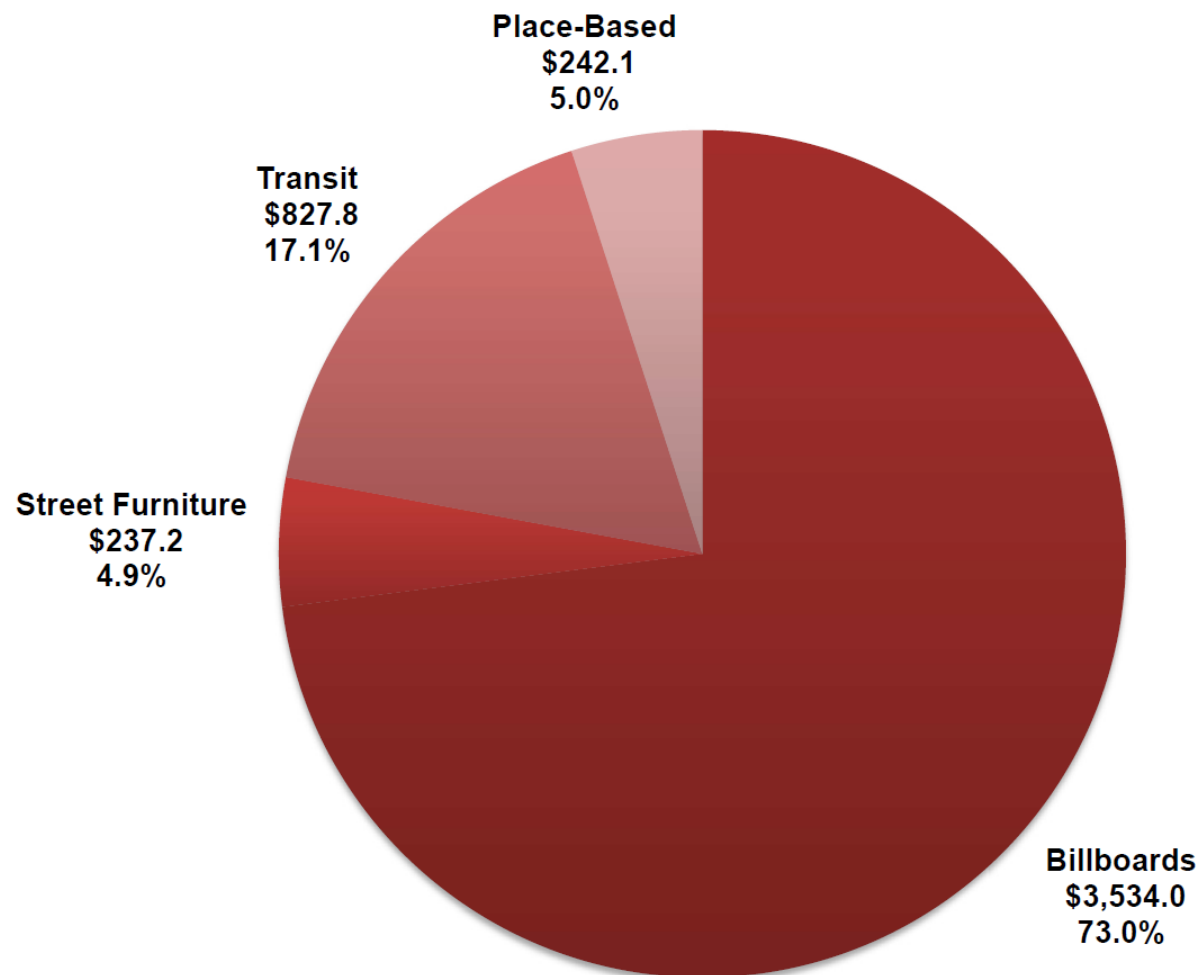
## Executive Summary FY25 Forecast: +6.9%, Compared to +9.9% in 2024

### Ad Revenue Growth (Excl. Cyclical)



\* National TV includes ad sales from long form premium AVOD formats (Hulu, Peacock, Netflix, Disney+, Amazon Prime etc) and FAST feeds.  
\*\* Short-Form Pure Play Video includes Youtube, Twitch

# H1 2025: OOH Spend Grew 2.6% to Record High \$4.84 Billion



## H1 2025 vs. H1 2024 Category Performance

- Billboards +1.4%
- Street Furniture +5.9%
- Transit +6.4%
- Place-Based +3.1%

**+9.1%**

**DOOH Growth**

Digital OOH represents 35% of total OOH, format figures in millions.  
Source: OAAA

## Consumer Journey & Experience



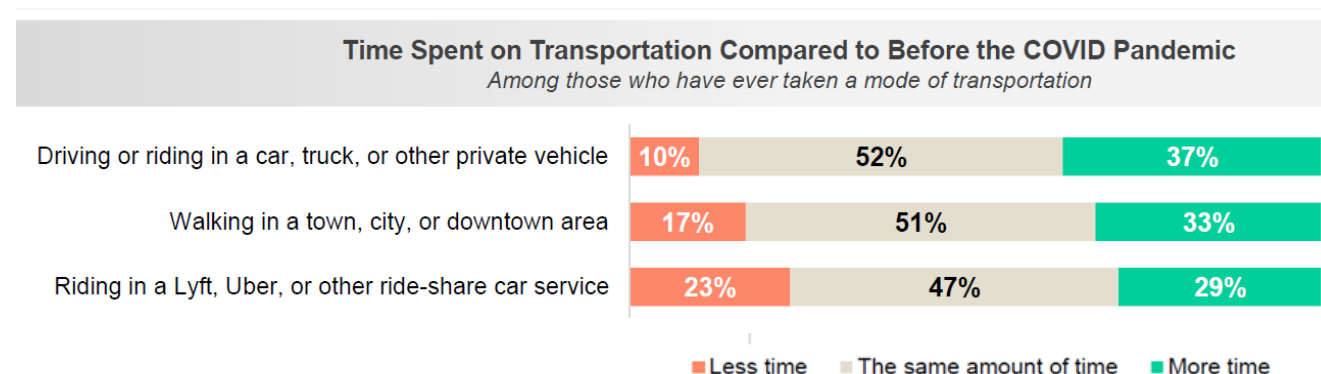
# H1 2025 + Moving 12-Month Average Auto Travel at Record Highs

## US Travel: Millions of Vehicle Miles

- January–June 2025 = 1,622,972 million (previous high 2024)
- July 2024–June 2025 = 3,291,246 million (previous high July 2023–June 2024)

**37%**

consumers driving more now  
than pre-COVID



Source: The Harris Poll

# Transit Continues to Grow – Air Travel Reflects Slight Economic Impact

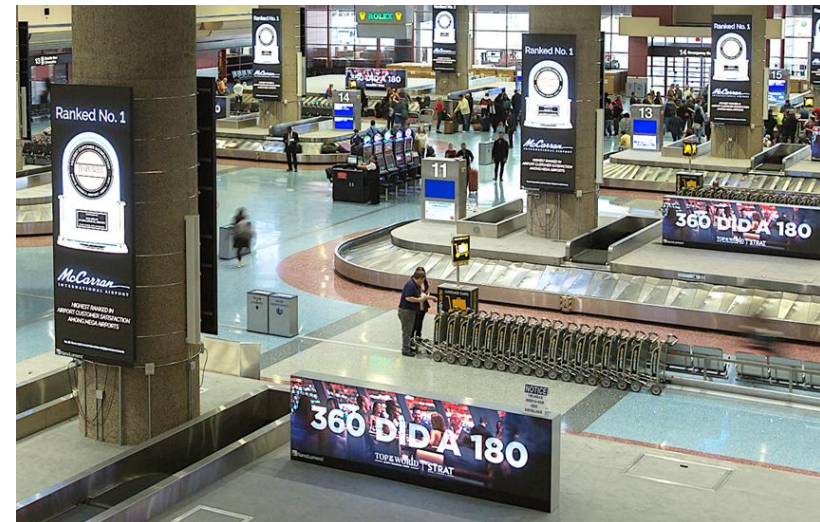
## US Transit Ridership

- Q1 2025 up 6% vs. Q1 2024
  - Heavy Rail +11.4%
  - Commuter Rail +8%
  - Bus +2%

## US Air Travel Passenger Volume

- 2024 = record Domestic + International volume
- January – May 2025 vs. January – May 2024
  - Domestic -1.7%
  - International flat
  - Total volume -1.3%

Source: APTA, US DOT



# Consumer Mobility + OOH Reach Drives Ad Notice



## Consumer Mobility Heightens OOH Ad Exposure

**85%** adults who have ridden in a vehicle in the past 30 days

**75%** adults who have walked in a town, city or downtown in the past 30 days

## OOH's Massive Reach Generates High Consumer Notice

**88%** adults who have seen OOH ads in the past 30 days

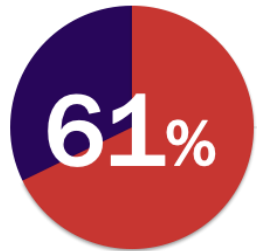
**85%** adults who look at OOH ads all, most or some of the time

Source: The Harris Poll, Morning Consult

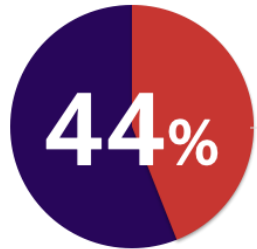
# OOH Complements Consumer Experiences, Engages When Most Likely to Act

## Engages When Most Likely to Act

OOH Ads Evoke High Favorability with Consumers



of adults view billboard ads favorably, high than any competitive media



net favorability rating for OOH ads beats digital media, radio, podcasts, streaming audio



Source: Morning Consult

# Consumers Are Highly Engaged With OOH



## 85% of Viewers Find OOH Ads Useful

Types of OOH ad messages consumers find most useful:

- 42%** special offers and promotions
- 29%** awareness of new business/service
- 25%** advertiser services and business hours
- 21%** advertiser website or social media information



Source: The Harris Poll

# OOH Ads Most Likely to Engage Consumers: Colorful, Clever and Clear

## OOH Ads Most Likely to Engage Consumers:



- 45%** Colorful and vibrant
- 38%** Portrays something clever or funny
- 36%** Simple design, few words, easy to read
- 32%** Big and bold (e.g., a larger than life mural on a tall building, bus or mobile billboard)
- 19%** Evokes an emotional feeling/has a serious tone
- 17%** Abstract and creative illustration with no words

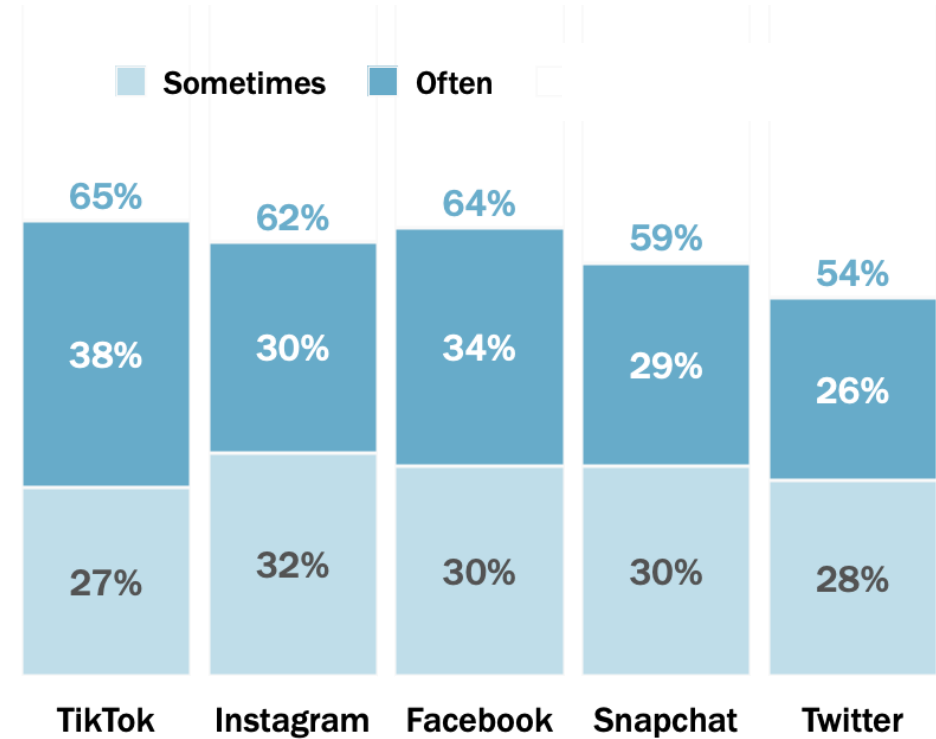


Source: The Harris Poll

# Social Media Users Notice OOH Ads Posted on Platforms

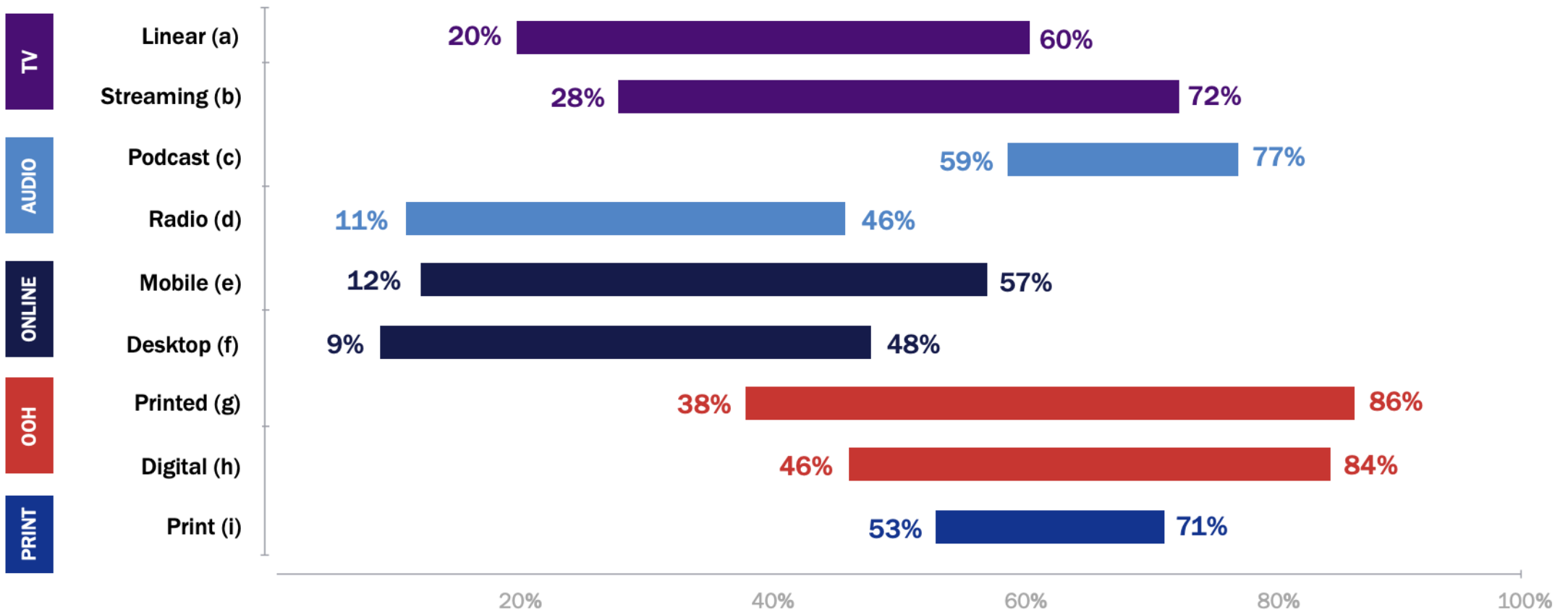
How often do you see out of home advertisements reposted on the following social media platforms?

*Among users of each social media platform*



Source: The Harris Poll

# OOH Generates Highest Ad Recall of All Core Media



Source: Solomon Partners

# OOH's Valuable Audience



## Importance of OOH Ad Messages Reflecting Target Audience Identity.

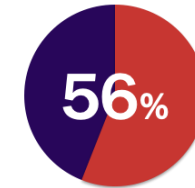
% more likely to notice OOH ads reflecting their cultural identity

OOH viewers are younger and have higher income than the general population

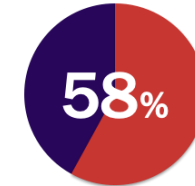
OOH's highest indexing viewers: ages 18 - 44

OOH over-indexes with Asian and Hispanic Americans, and with Black Americans in many OOH formats

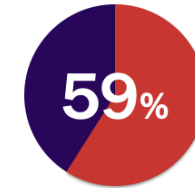
Asian, Black, and Hispanic Americans are more likely more likely to notice OOH ads that reflects their cultural identity



Hispanic Americans



Black Americans



Asian Americans

Source: The Harris Poll, Morning Consult

# OOH Resonates with Multicultural Consumers

## Favorability Toward OOH Advertising Over Indexes with Multicultural Consumers vs. US Adults

|                    |      |
|--------------------|------|
| Asian Americans    | +8%  |
| Hispanic Americans | +14% |
| Black Americans    | +20% |

## More Likely to Notice OOH Ads with Directions to Stores/Restaurants vs. US Adults

|                    |      |
|--------------------|------|
| Black Americans    | +7%  |
| Hispanic Americans | +17% |
| Asian Americans    | +27% |

## More Likely to Visit Stores/Restaurants within 30 Minutes of Seeing Directional OOH Ads vs. US Adults

|                    |      |
|--------------------|------|
| Black Americans    | +28% |
| Hispanic Americans | +28% |
| Asian Americans    | +40% |



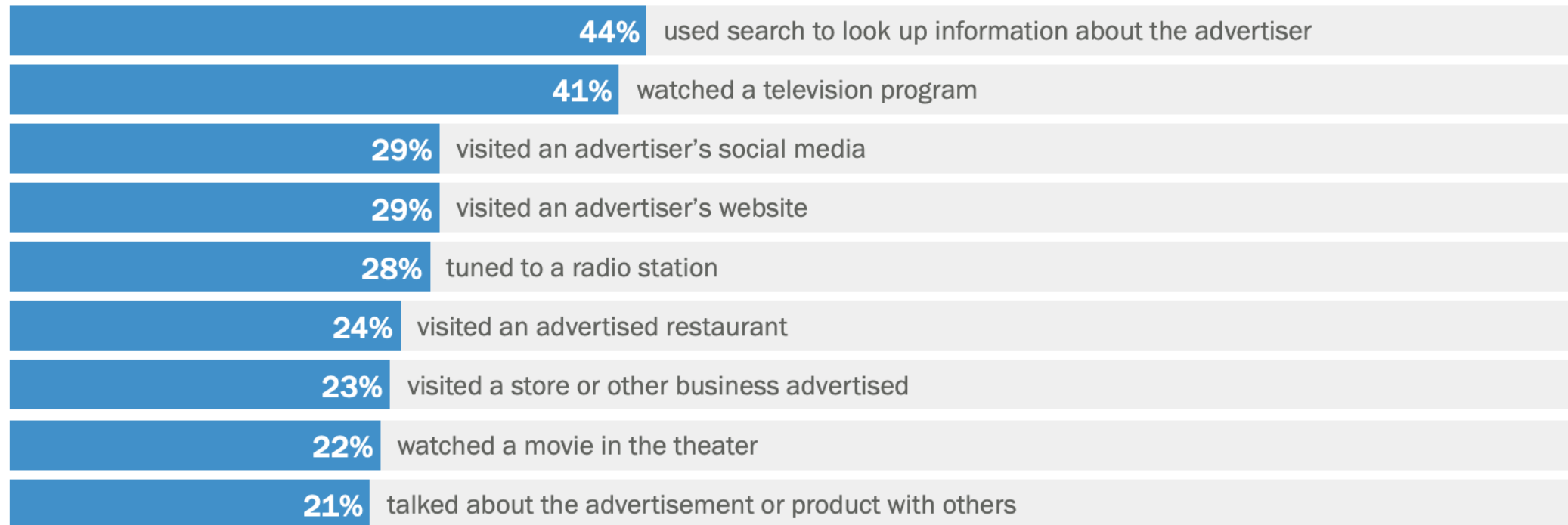
Source: Morning Consult

**OOH Effectiveness**



# Almost Four in Five Act Following Recent OOH Ad Exposure

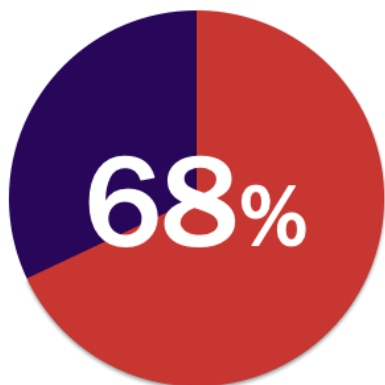
**78%** of US adults took an action after recently seeing an OOH ad including:



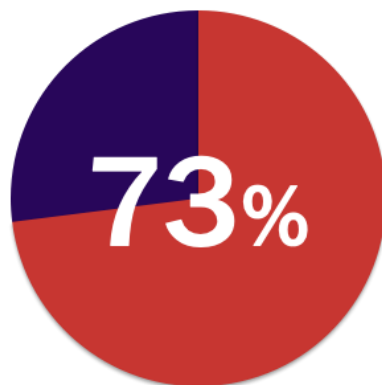
Source: Morning Consult

# OOH Engages Consumers On Journeys to Retail Stores

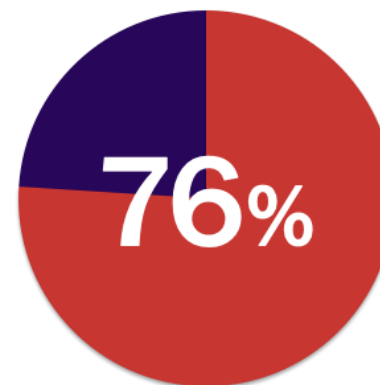
Almost ~70%+ Notice OOH Ads on Their Way to In-Store Shopping



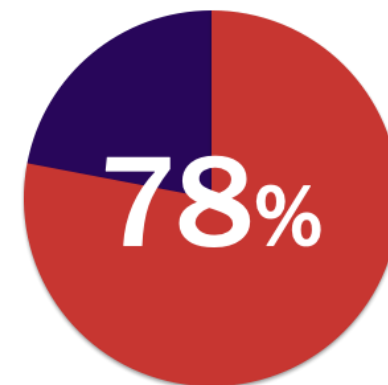
US Adults



Asian Americans



Hispanic Americans



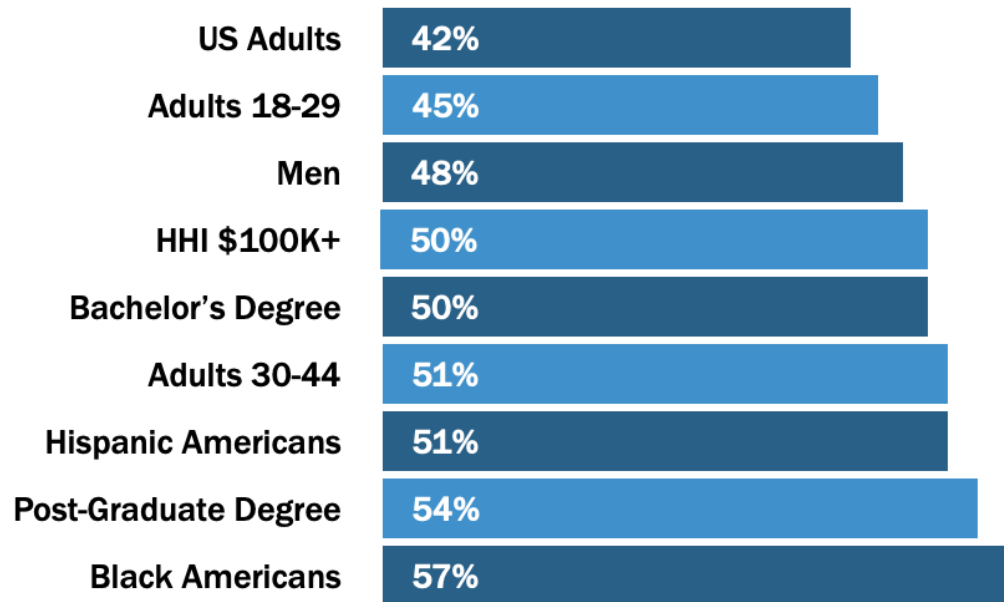
Black Americans

Source: Morning Consult

# OOH Influences Consumer Purchase Decisions



## Almost Half Say OOH Ads Impact In-Store Purchase Decisions



Source: Morning Consult

# OOH Primes Mobile Activation



**76%** of US adults took an action on their mobile device after recently seeing an OOH ad including:



Source: Morning Consult

# OOH Most Efficient at Driving Online Activation

## Top Efficiencies - OOH Ads Prompted Consumers to Take Action:

**41%** used a search engine

**33%** visited a website

**21%** posted in social media

**19%** downloaded an app

**33%** searched social media

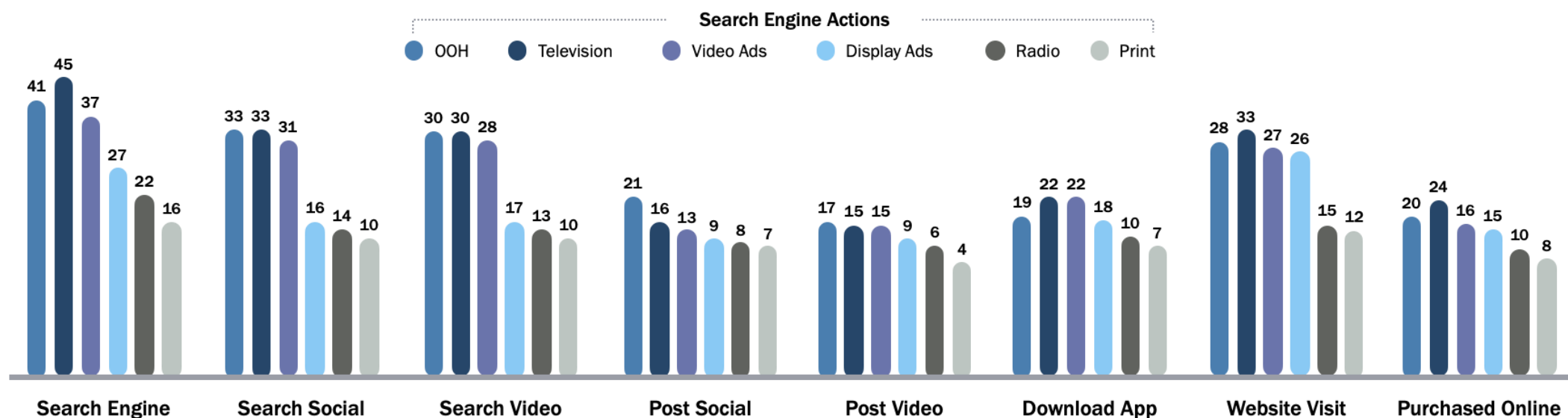
**30%** searched for video

**20%** made an online purchase

**18%** posted a video

Interpreting Survey Chart Results | Within the past six months, 41% of US adults used a search engine to look up information after seeing an out of home ad.

Methodology: Conducted online between March 3 and 31, 2022, among a representative sample of 1,580 US residents aged 16-64. Ad spend data supplied by MAGNA | Source: OAAA, Comscore



Source: Comscore

# OOH Key Product Category Ads Most Relevant to Consumers

## Consumers Rate a Wide Variety of OOH Product Ads as Most Relevant



**63%**  
Retail



**54%**  
Consumer Tech



**62%**  
Fast Food



**52%**  
Automotive



**60%**  
Food & Beverages



**43%**  
Insurance



**55%**  
Health Services



**43%**  
Financial Services



Source: The Harris Poll



# A majority of adults recall recently seeing OOH ads for major sporting events

59% recall seeing OOH ads for major sporting events, with the highest recall among men, Gen Z, and residents in large urban areas (1M+).

**90%** of adults 18-64 engaged with a **major sporting event OOH ad** after seeing it

**61%** of adults 18-64 engaged on social media

## Actions Taken After Seeing Major Sporting Event OOH Ad

*Among those who have engaged with the ad type*

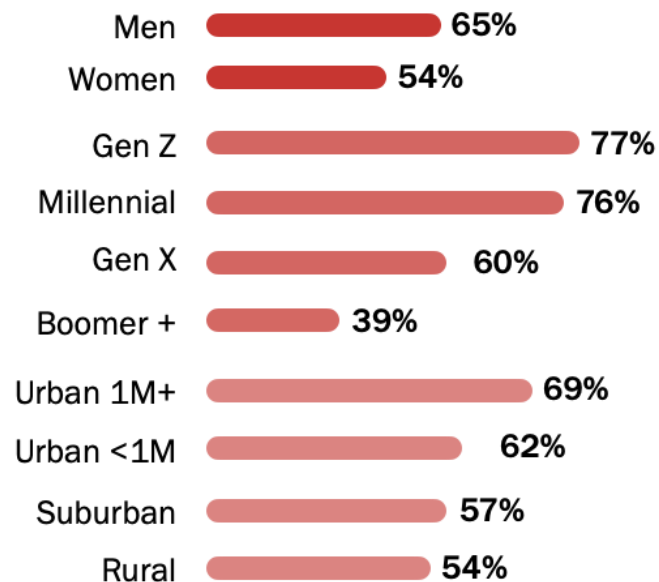


Source: The Harris Poll

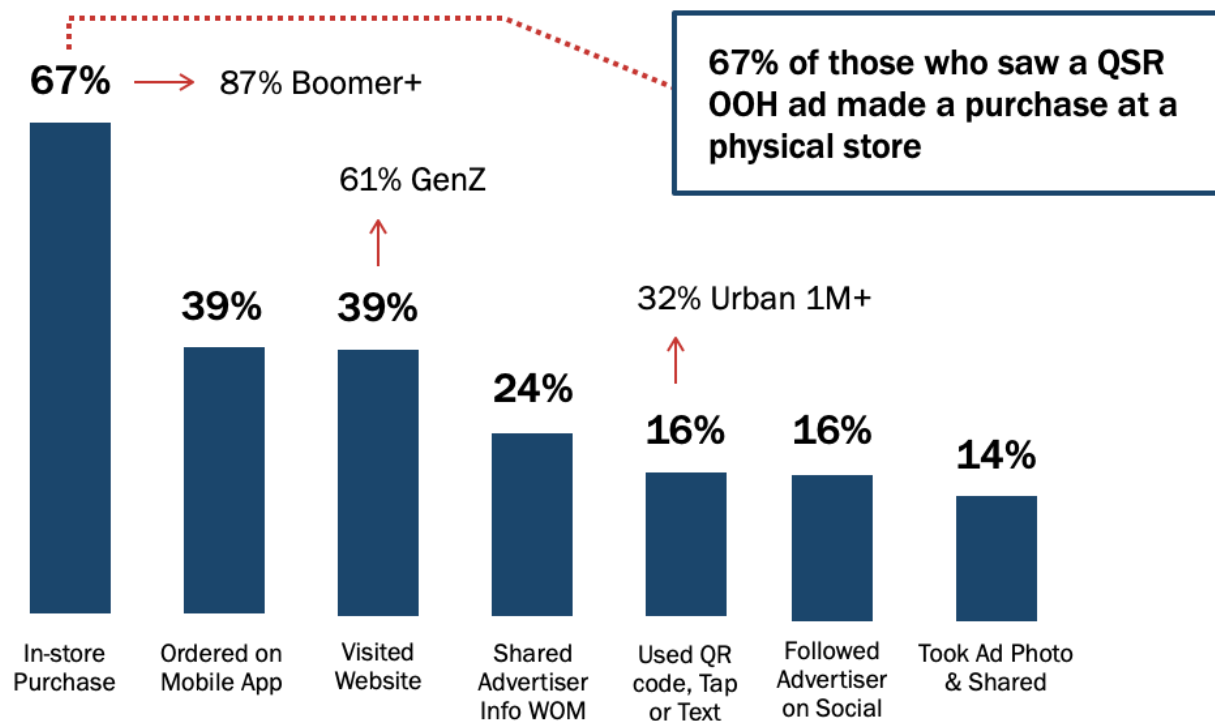
# OOH Reaches QSR Consumers → Drives Sales

## 6 in 10 Recall Seeing OOH QSR Ads Recently

(Especially Younger & Urban Americans)



## OOH QSR Ads Engaged Almost 9 in 10 Recent Viewers



Source: The Harris Poll



# OOH Impact with Key Product Categories

**OOH impact in driving notice and engagement + ad content most likely to resonate with consumers**

- Alcoholic Beverages
- Automotive
- Cannabis
- Colleges/Universities
- Financial Services
- Healthcare Services
- Home Improvement/Hardware Stores
- Hotels
- Insurance Services
- Job Recruitment
- Legal Services
- Luxury Apparel
- Non-Alcoholic Beverages
- Personal Care Products
- Pharmaceuticals
- Political
- Quick Service Restaurants
- Real Estate
- Sit Down Restaurants
- Sports Betting
- Sports Event Marketing
- TV/Video Streaming Services

# OOH: Improve Sales ROI With Reallocation of Existing Budgets

Increased OOH allocation boosts media plan sales ROI at no additional cost



OOH delivers strong ROAS that improves total media mix ROAS



OOH drives improved brand perceptions throughout the marketing funnel



Current media mixes are not optimized because OOH is not planned at sufficient allocations



Underfunding OOH prevents total plan optimization due to over allocation to other channels

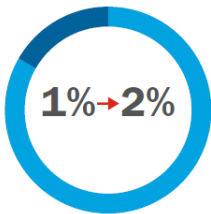


Increases of even a few points of share to OOH achieves the vast majority of total plan optimization

## Key Findings

## ROAS Impact of Boosting OOH Media Plan Share

### Automotive



OOH share shift from 1% to 2%

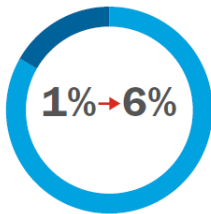
**75%**

capture of total ROAS optimization

**\$52M**

ROAS gain generated

### CPG Food



OOH share shift from 1% to 6%

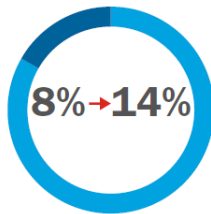
**70%**

capture of total ROAS optimization

**\$2.4M**

ROAS gain generated

### Retail Grocery



OOH share shift from 8% to 14%

**61%**

capture of total ROAS optimization

**\$16M**

ROAS gain generated



# OOH: Improve Brand Metrics ROI With Reallocation of Existing Budgets

Increased OOH allocation boosts media plan brand metric scores at no additional cost

## Key Findings



OOH delivers strong ROAS that improves total media mix ROAS



OOH drives improved brand perceptions throughout the marketing funnel



Current media mixes are not optimized because OOH is not planned at sufficient allocations



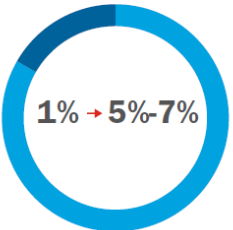
Underfunding OOH prevents total plan optimization due to over allocation to other channels



Increases of even a few points of share to OOH achieves the vast majority of total plan optimization

## ROAS Impact of Boosting OOH Media Plan Share

### Automotive

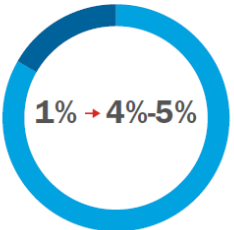


OOH share shift from 1% to a range of 5%-7% dependent on KPI (awareness, consideration, purchase intent) achieves

**89%-96%**

of total brand metric optimization

### CPG Food

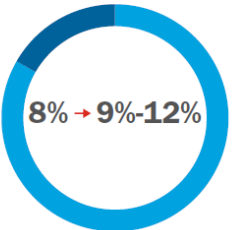


OOH share shift from 1% to a range of 4%-5% dependent on KPI (awareness, consideration, purchase intent) achieves

**72%-79%**

of total brand metric optimization

### Retail Grocery



OOH share shift from 8% to a range of 9%-12% dependent on KPI (awareness, consideration, purchase intent) achieves

**63%-99%**

of total brand metric optimization

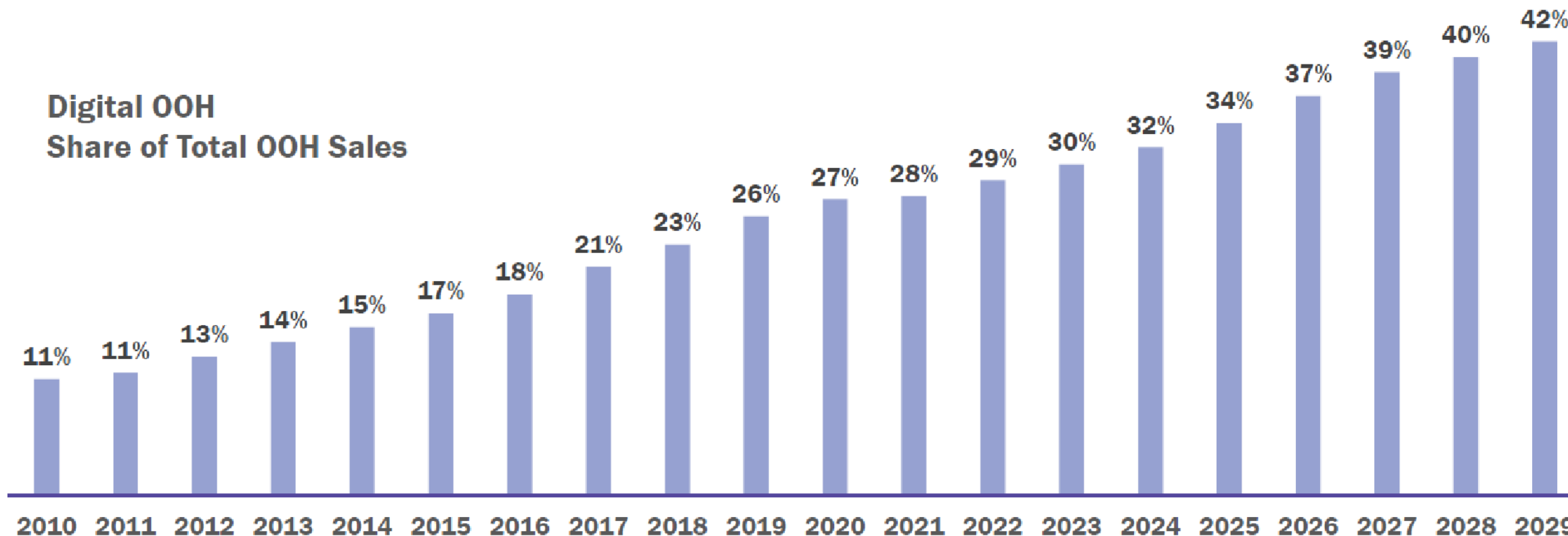


**Digital Transformation**



# MAGNA: DOOH Share of Total OOH Spend 2010 - 2029

## Digital OOH Share of Total OOH Sales

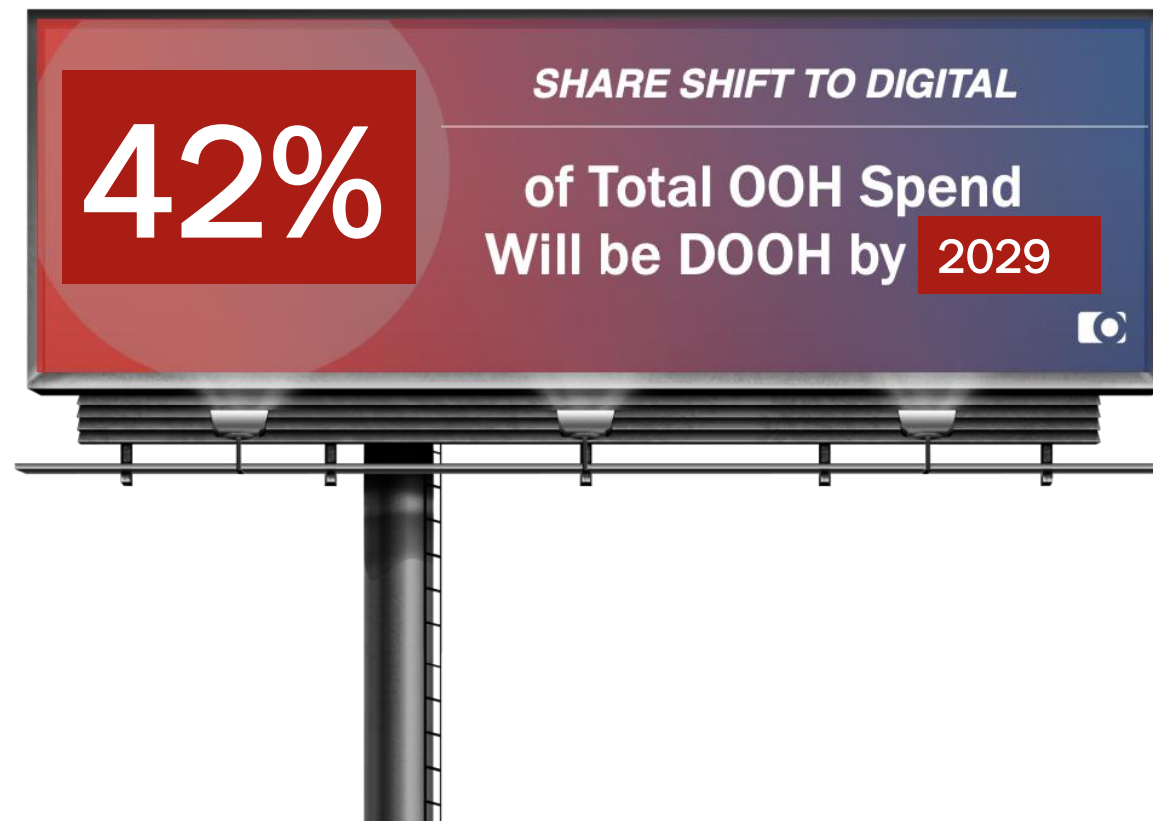


Source: MAGNA (Dec 2024); excludes cinema

## Digital: Key Growth Driver for OOH

7.5%  
DOOH  
Revenue  
Growth  
In 2024

10%  
DOOH  
Projected  
Growth  
In 2025



20K  
Digital Billboard  
Units  
2025

Source: MAGNA, OAAA

# Consumer Concerns with Competitive Digital Media



## Consumers are annoyed by ad sponsored digital media content and feeling device fatigue

**78%** are annoyed with **ads that interrupt** viewing, listening, and reading experiences

**73%** are **concerned about personal security** and data when using online devices

**68%** frequently skip online ads due to **digital device burnout**

**43%** are actively trying to **spend less time** on their phone, computer, or reduce TV viewing

Source: The Harris Poll

## Digital OOH Generates Consumer Notice



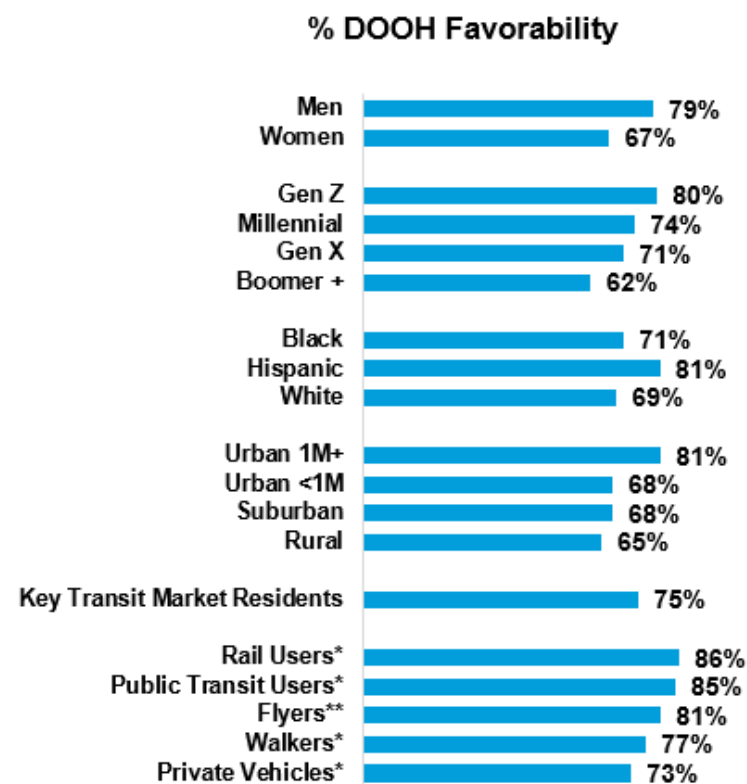
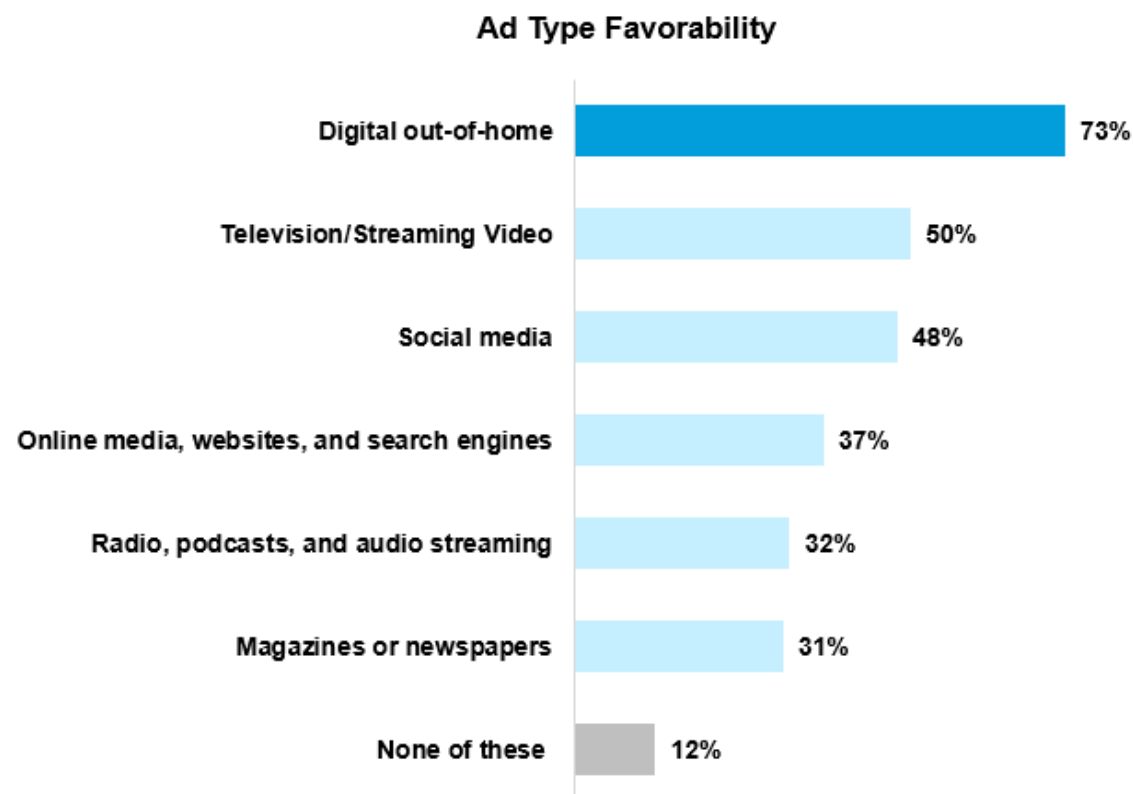
62%

Consumers who have recently noticed digital billboard ads

Source: The Harris Poll

# Digital OOH: Most Favorably Viewed Advertising Format

Consumers in large urban areas, transit users, and younger generations are most favorable toward DOOH ads.



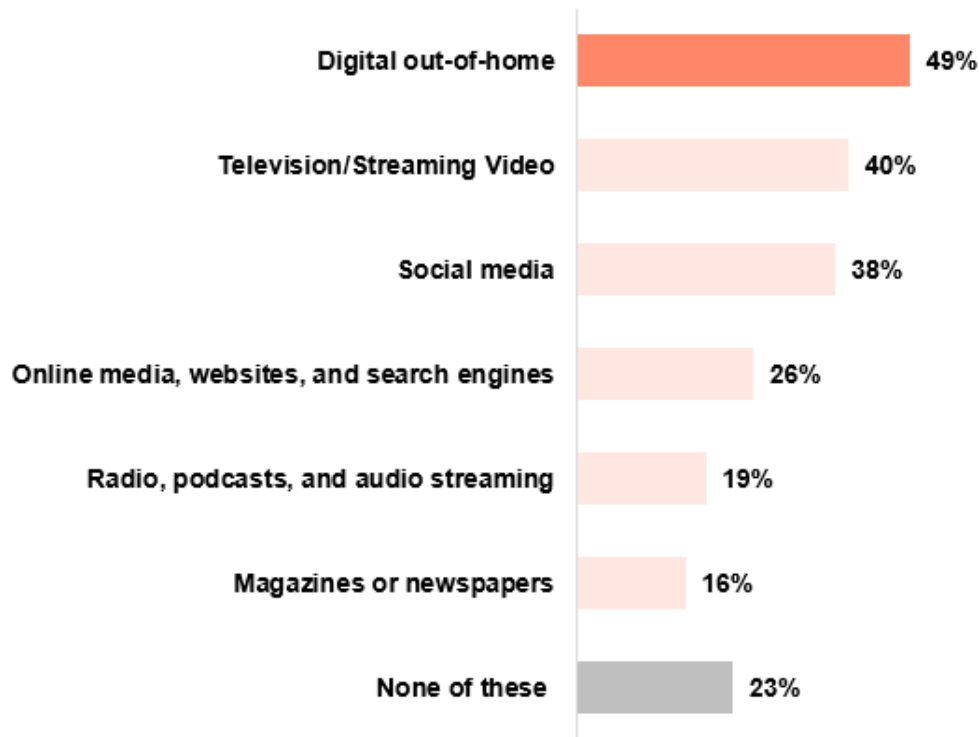
\* Past Month  
\*\* Past 12 Months

Source: The Harris Poll

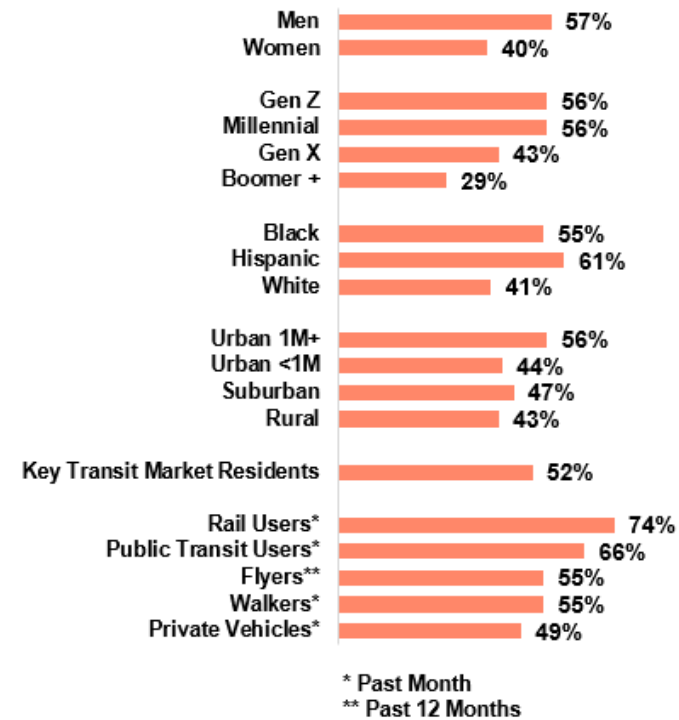
# Digital OOH: Ad Format Most Likely to Drive Consumer Action

Consumers in large urban areas, transit users, and younger generations are most driven by DOOH ads to take action.

Ad Types to Drive Actions



% DOOH Drove Action

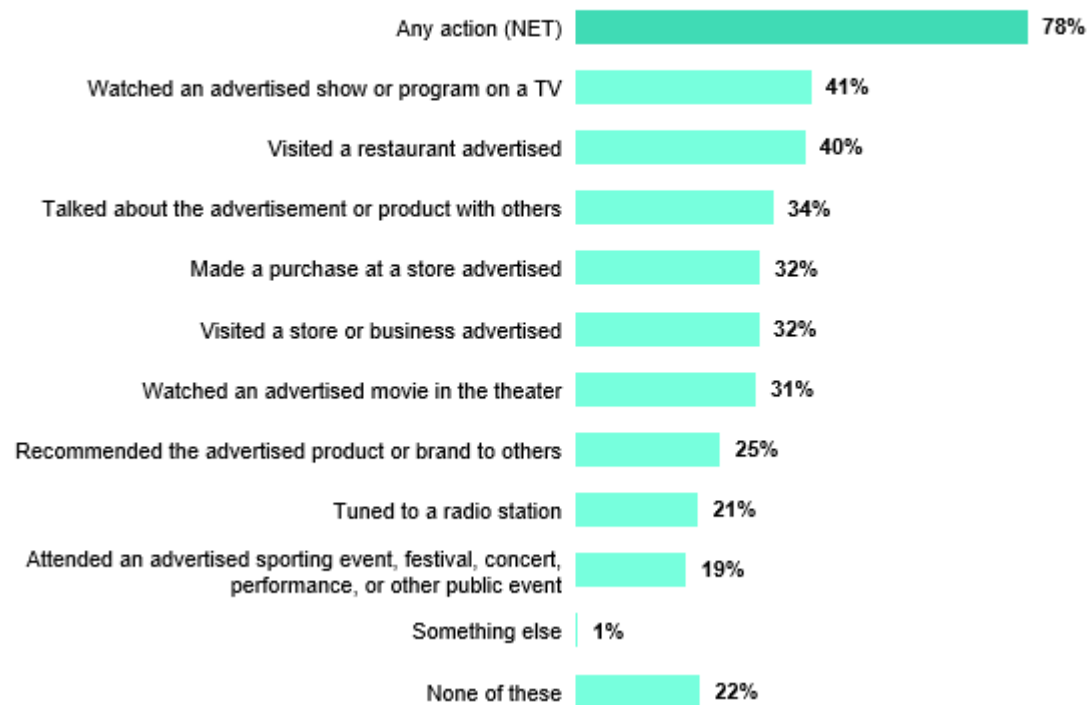


Source: The Harris Poll

# Consumer Actions Most Likely Driven by DOOH Billboard Ads

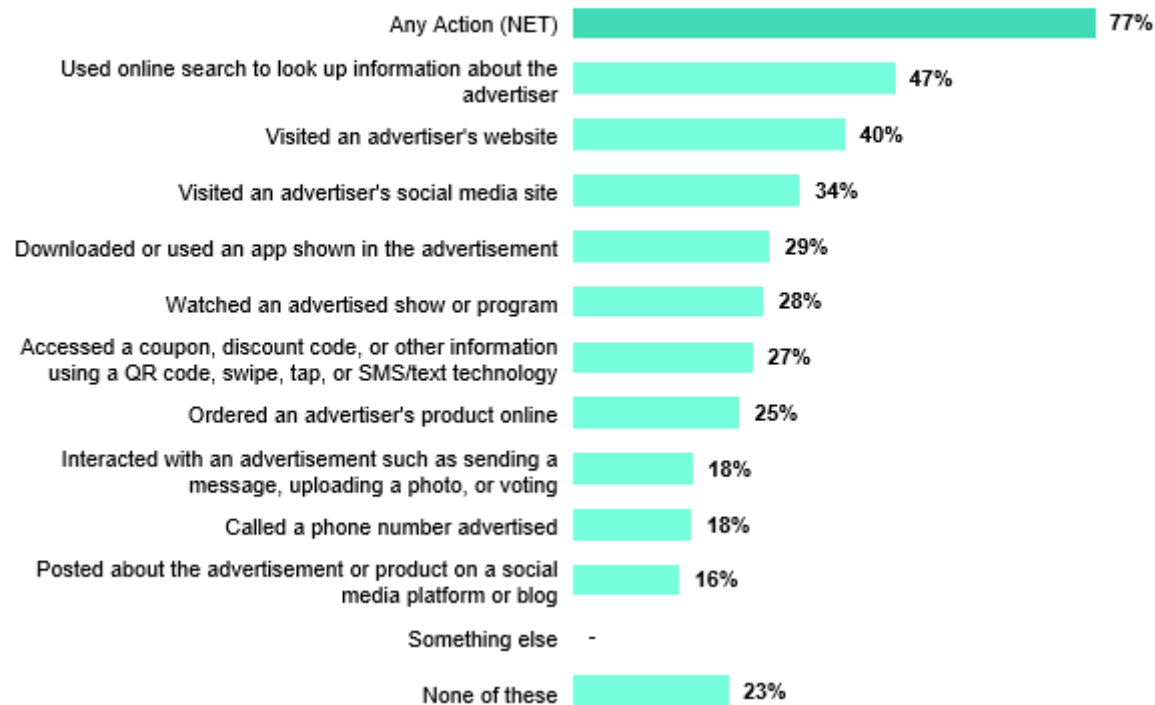
## Actions Taken by Digital Billboard Ad Viewers

*Among those who have seen Digital Billboard/Poster in the P3M*



## Smartphone Actions Taken by Digital Billboard Ad Viewers

*Among smartphone users who have seen Digital Billboard/Poster in the P3M*



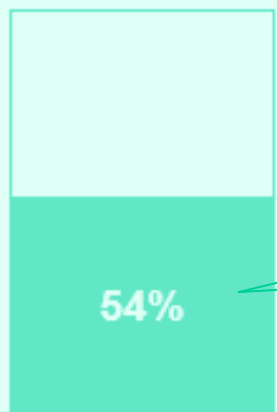
Source: The Harris Poll

# DOOH Ads Impact Purchasing Decisions of Over Half of Consumers

## Digital Billboard Ad Impact on Purchasing Decision

% Significant/Somewhat of an Impact

*Among those who have ever seen any DOOH ad, excluding not sure*



Generates Biggest Purchase Decision Impact With:

- **Public transit (68%) and rail (70%) users**
- **Younger consumers (Gen Z 63%, Millennial 63%)**

Source: The Harris Poll

# Nearly Half Say Contextual OOH Ads Are More Interesting

## Dynamic OOH Ad Content Increases Consumer Interest

Percent who find OOH ads with timely information more interesting than typical ads

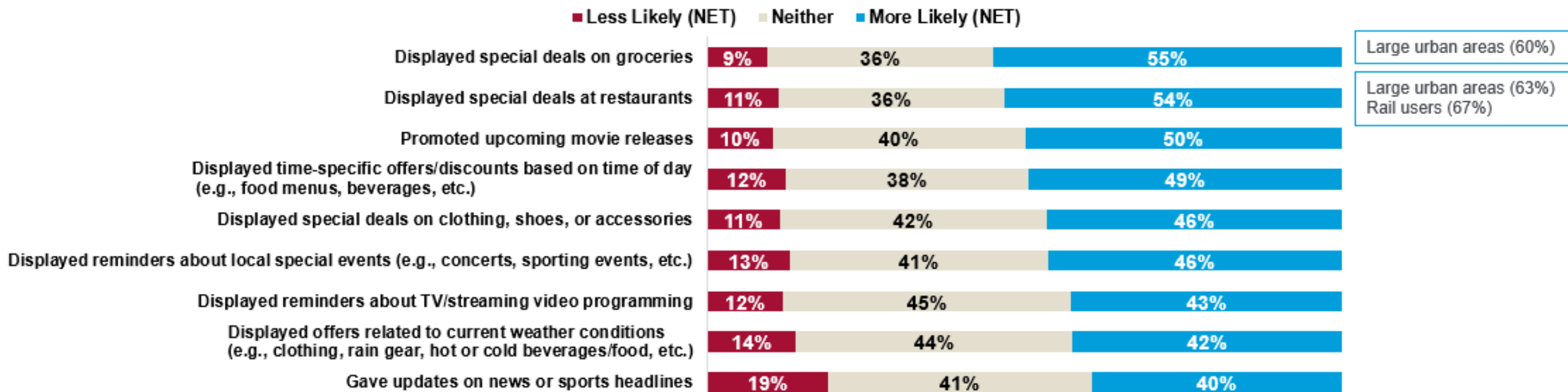
|                          |     |
|--------------------------|-----|
| US Adults                | 40% |
| Millennials              | 45% |
| Bachelor's Degree        | 45% |
| Urban Residents          | 45% |
| Hispanic Americans       | 46% |
| Household Income \$100K+ | 51% |
| Adults 30 - 44           | 51% |
| Post-Graduate Degree     | 56% |



Source: The Harris Poll

# DOOH Ad Content Most Likely to Drive Consumer Engagement

Likelihood To Notice DOOH Ads By Content Attributes

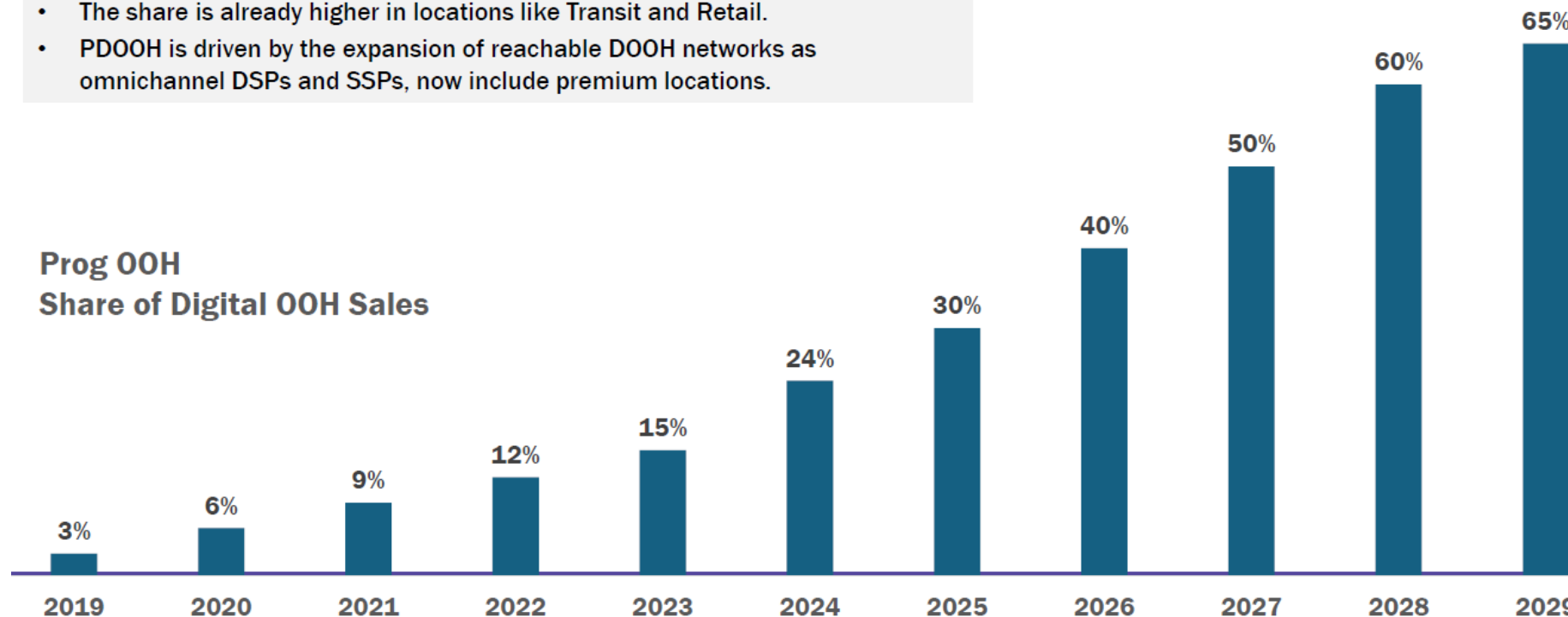


Source: The Harris Poll

# MAGNA: Programmatic Share of DOOH Spend 2019 - 2029

## Programmatic DOOH Takes Off

- Programmatic spending accounted for approx. 15% of national DOOH spending in 2023 and **24% in 2024**. It will reach 65% by 2029.
- The share is already higher in locations like Transit and Retail.
- PDOOH is driven by the expansion of reachable DOOH networks as omnichannel DSPs and SSPs, now include premium locations.



Source: MAGNA, Rapport