



Out of Home Advertising Association of America

Maximizing OOH in Today's Marketplace

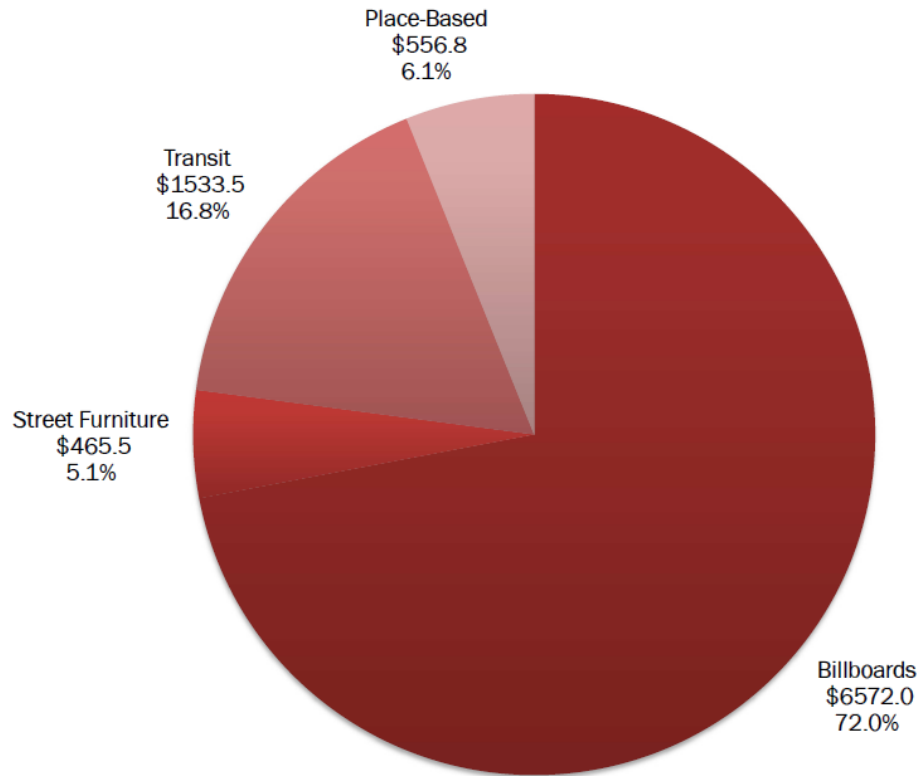
Key 2025 Trends & Consumer Insights

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

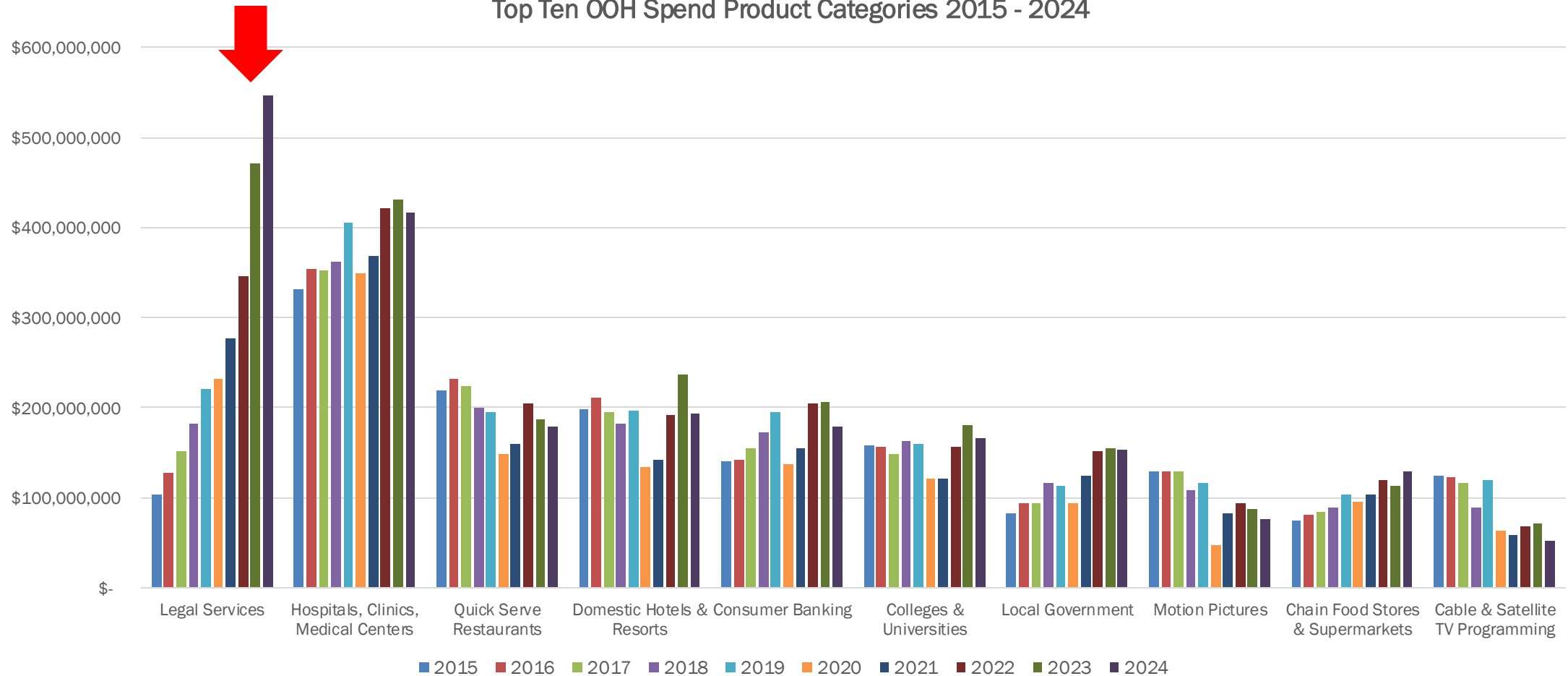
The top 25 product categories account for 53% of total OOH spend



Source: MediaRadar

OOH Ad Spend: Product Category Trends 2015 - 2024

Top Ten OOH Spend Product Categories 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

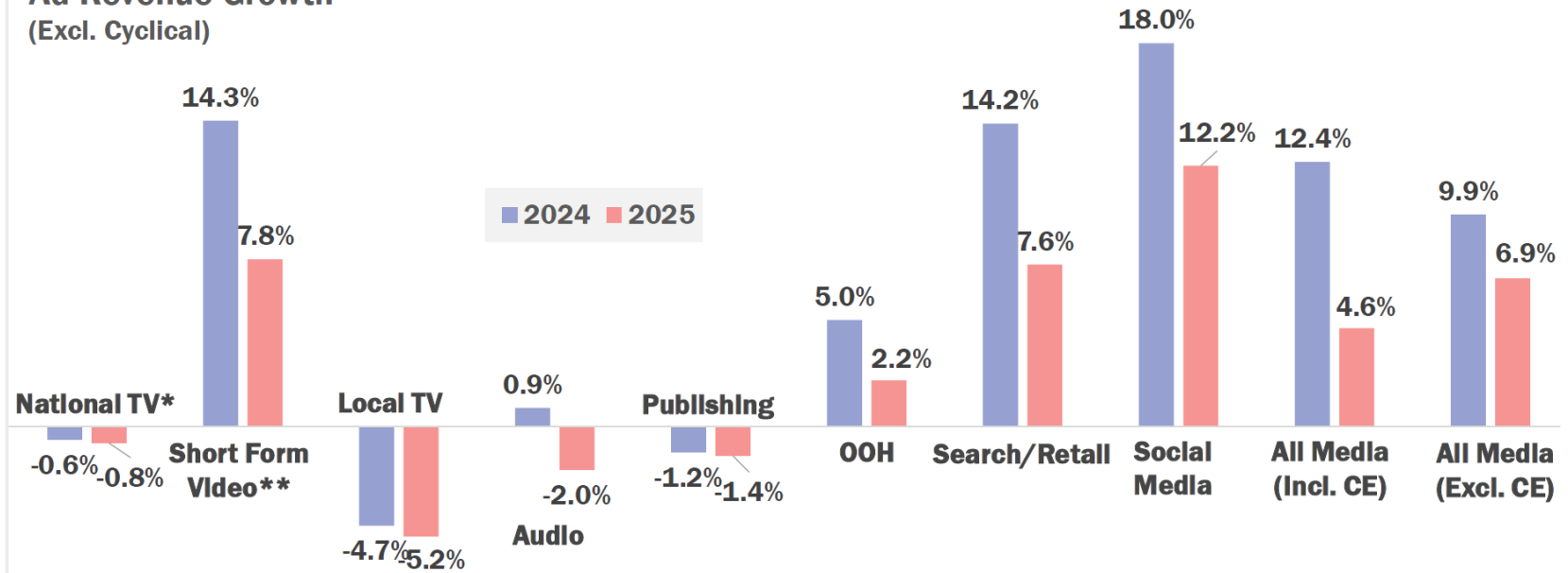
M/GNA

Executive Summary

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

Ad Revenue Growth (Excl. Cyclical)

US Ad Forecast (Summer 2025)



* 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

Source: MAGNA (June 2025)
 CE= Cyclical events (Political + Olympics)

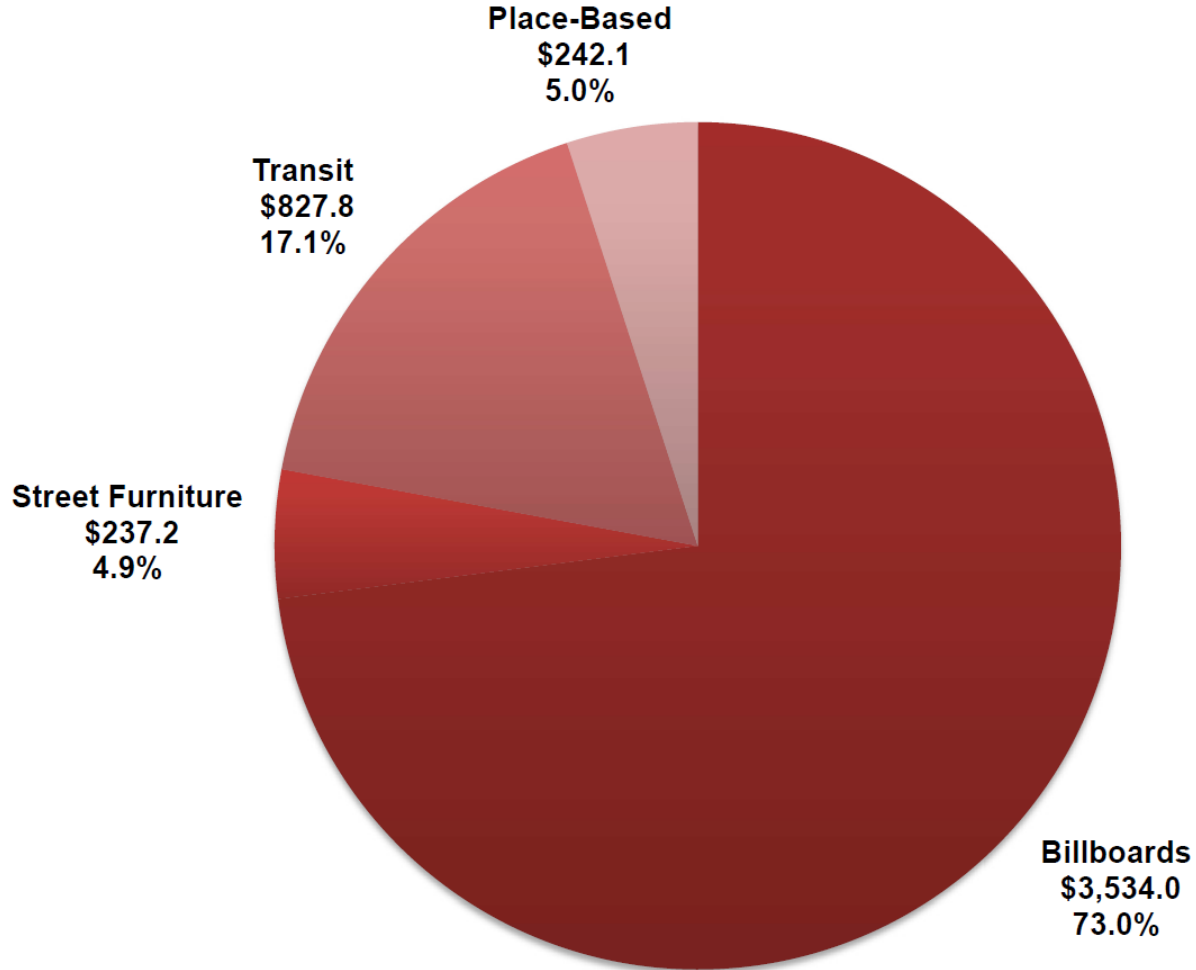
2024

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

2025 MAGNA Forecast

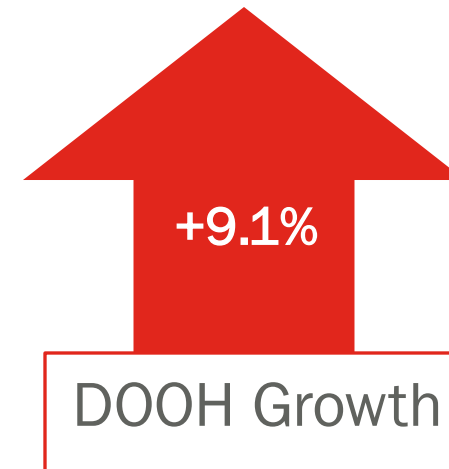
- Total media = +6.9%
- OOH growth = +2.2%

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%



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

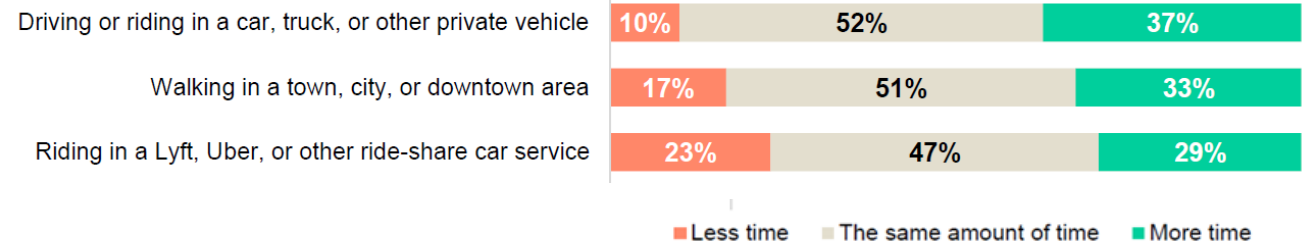
- January–June 2025 = 1,622,972 million (previous high 2024)
- July 2024–June 2025 = 3,291,246 million (previous high July 2023–June 2024)

37%

consumers driving more now
than pre-COVID

Time Spent on Transportation Compared to Before the COVID Pandemic

Among those who have ever taken a mode of transportation



Source: The Harris Poll

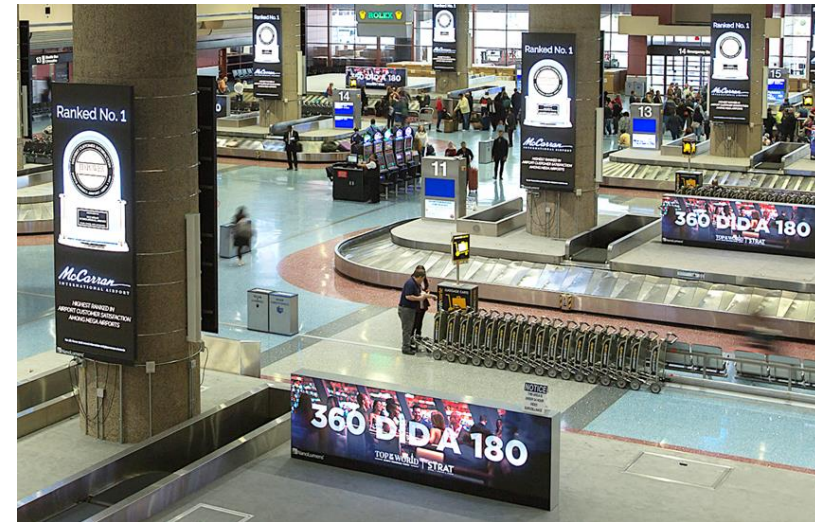
Transit Continues to Grow – Air Travel Reflects Slight Economic Impact

US Transit Ridership

- First Half 2025 up 7.3% vs. First Half 2024
 - Heavy Rail +15.2%
 - Commuter Rail +9.4%
 - Bus +2%

US Air Travel Passenger Volume

- 2024 = Domestic + International record volume
- January – July 2025 vs. January – July 2024
 - Domestic -1.3%
 - International +0.02%
 - Total volume -1%



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

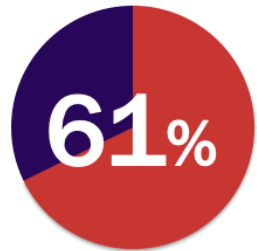
85% adults who look at OOH ads all, most or some of the time

Source: The Harris Poll, Morning Consult

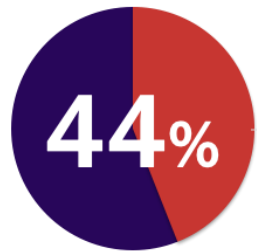
OOH Complements Consumer Experiences, Engages When Most Likely to Act

Engages When Most Likely to Act

OOH Ads Evoke High Favorability with Consumers



61% of adults view billboard ads favorably, high than any competitive media



44% 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

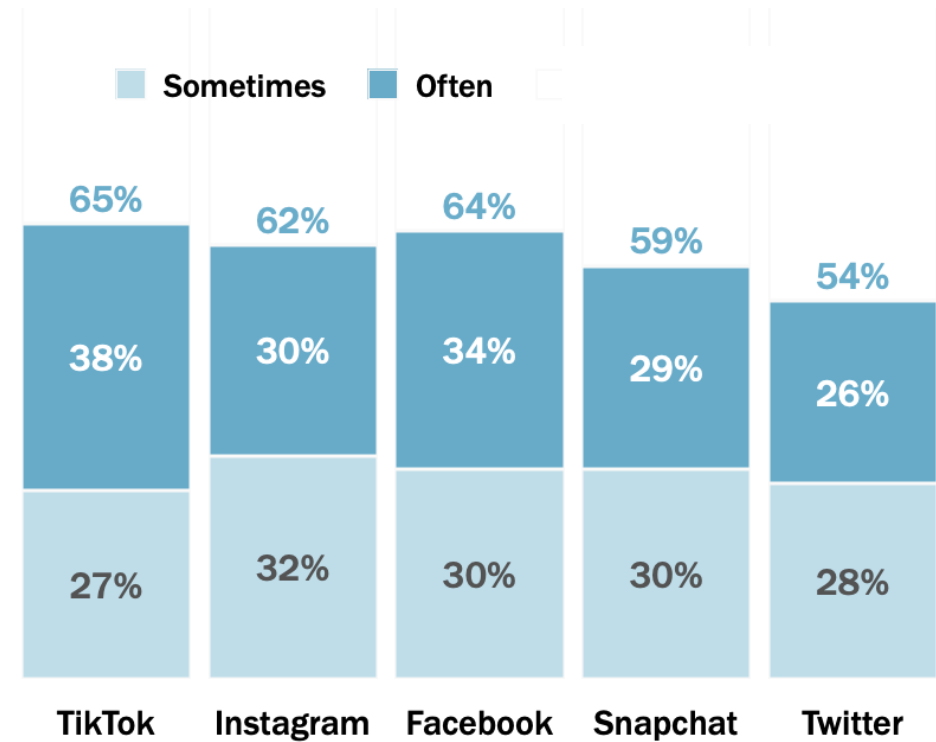


Source: The Harris Poll

Social Media Users Notice OOH Ads Posted on Platforms

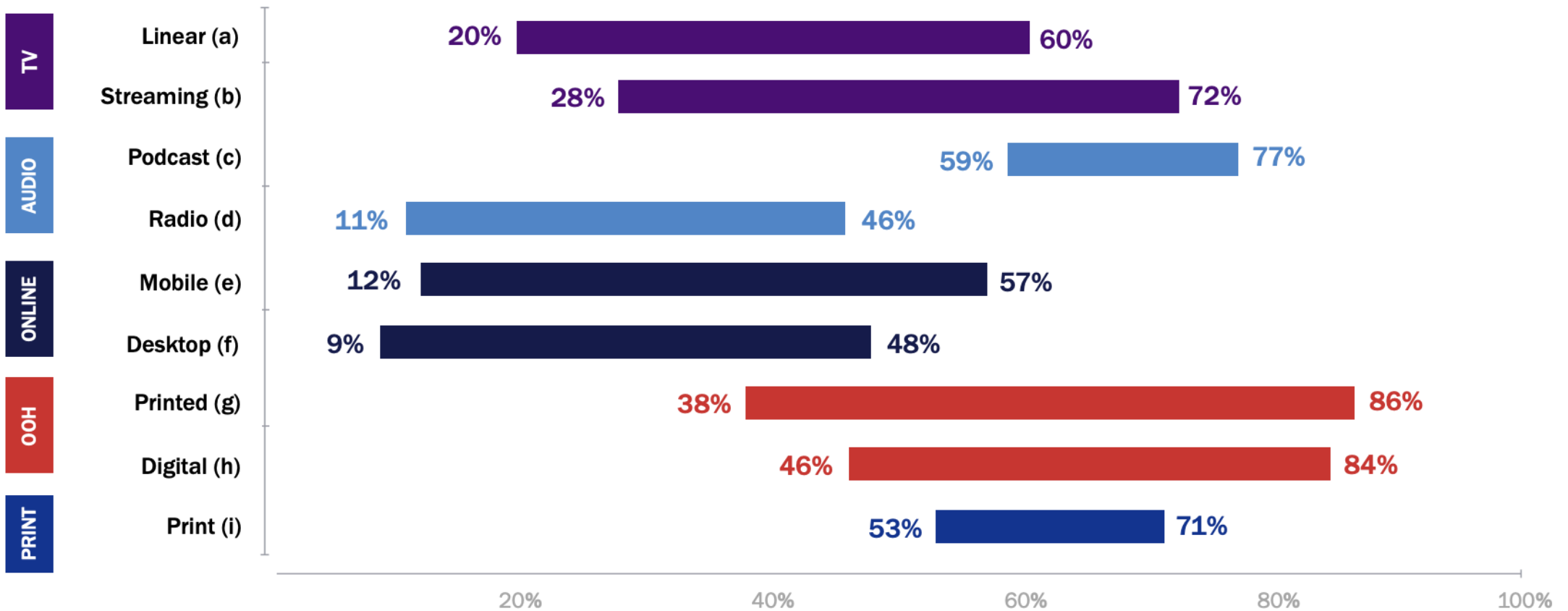
How often do you see out of home advertisements reposted on the following social media platforms?

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.

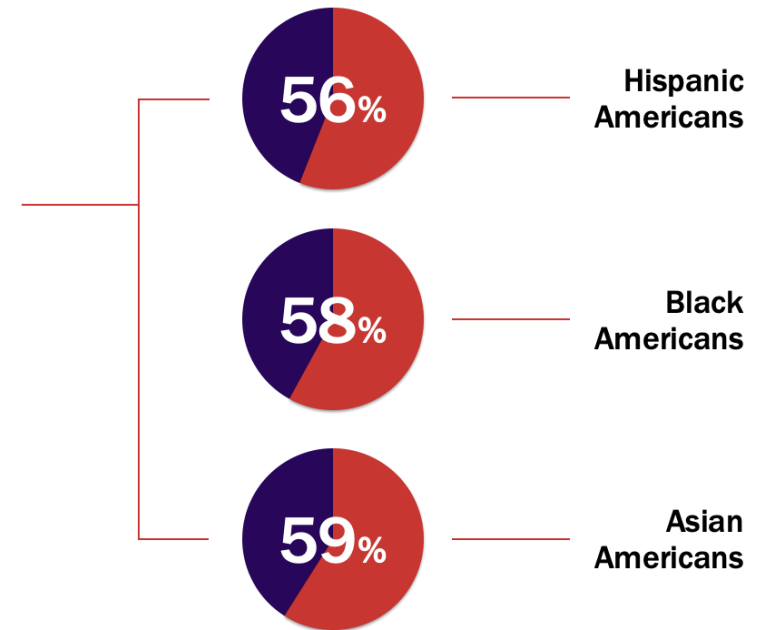
% more likely to notice OOH ads reflecting their cultural identity

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

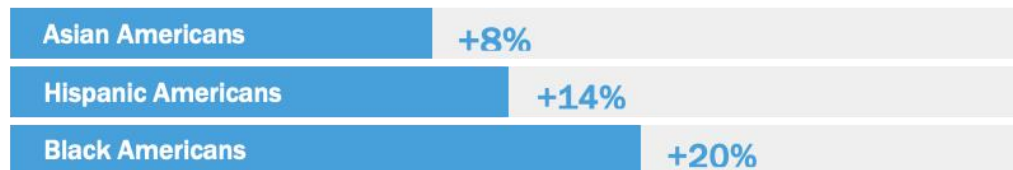
Asian, Black, and Hispanic Americans are more likely more likely to notice OOH ads that reflects their cultural identity



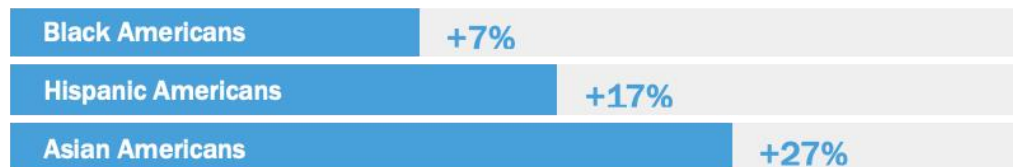
Source: The Harris Poll, Morning Consult

OOH Resonates with Multicultural Consumers

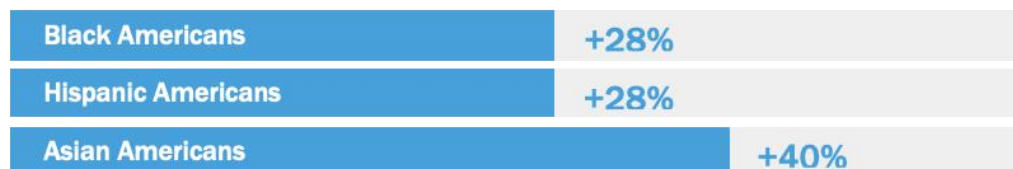
Favorability Toward OOH Advertising Over Indexes with Multicultural Consumers vs. US Adults



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



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



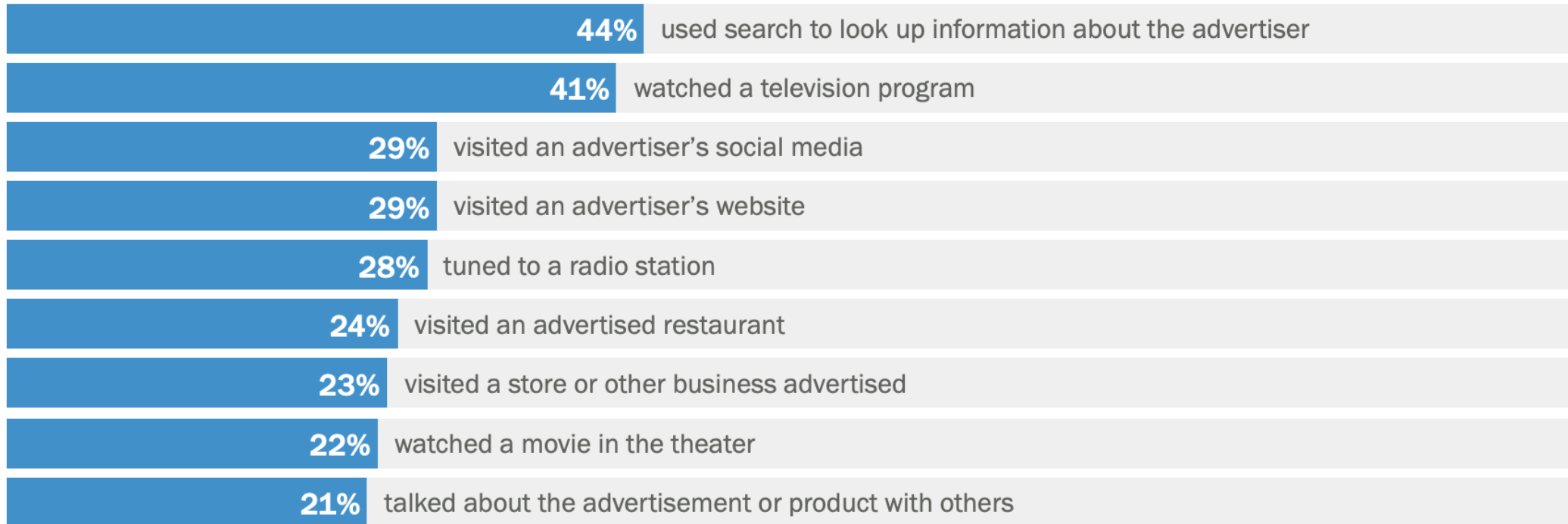
Source: Morning Consult

OOH Effectiveness



Almost Four in Five Act Following Recent OOH Ad Exposure

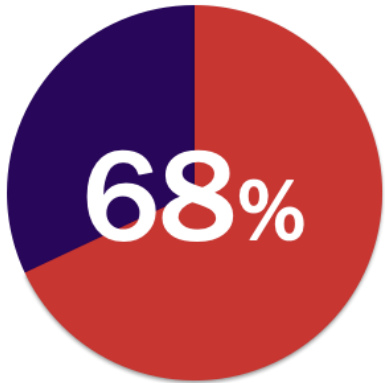
78% of US adults took an action after recently seeing an OOH ad including:



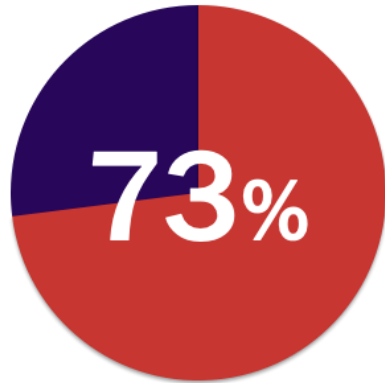
Source: Morning Consult

OOH Engages Consumers On Journeys to Retail Stores

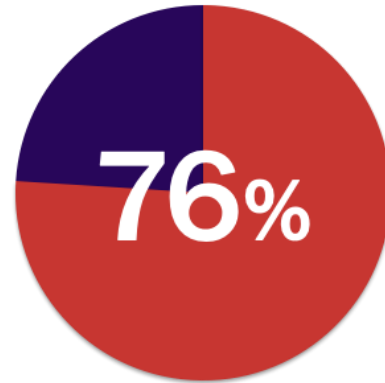
Almost ~70%+ Notice OOH Ads on Their Way to In-Store Shopping



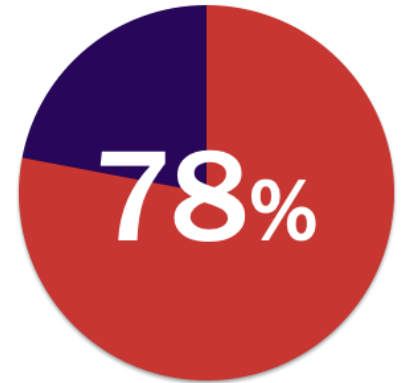
US Adults



Asian Americans



Hispanic Americans



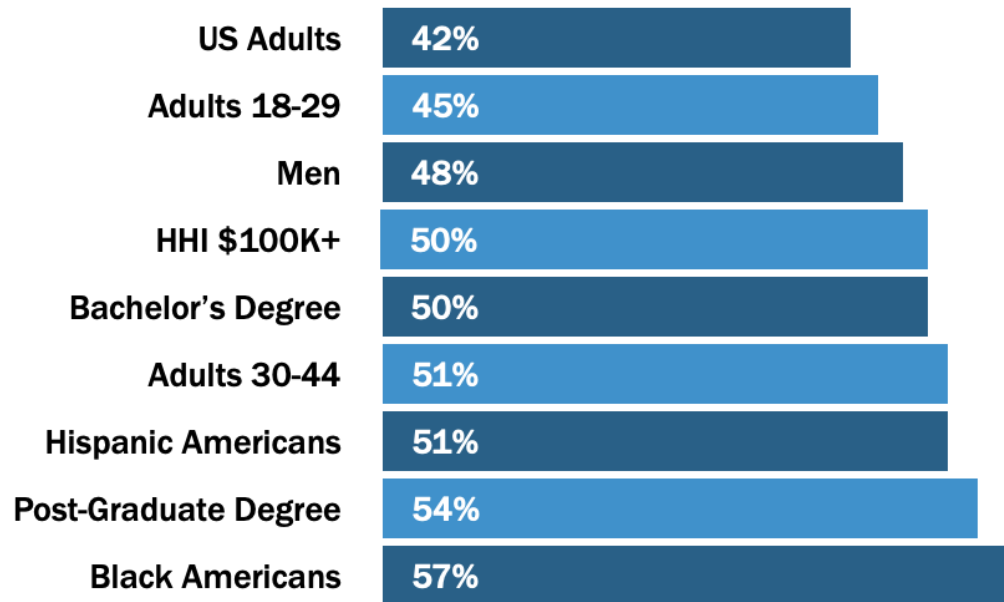
Black Americans

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

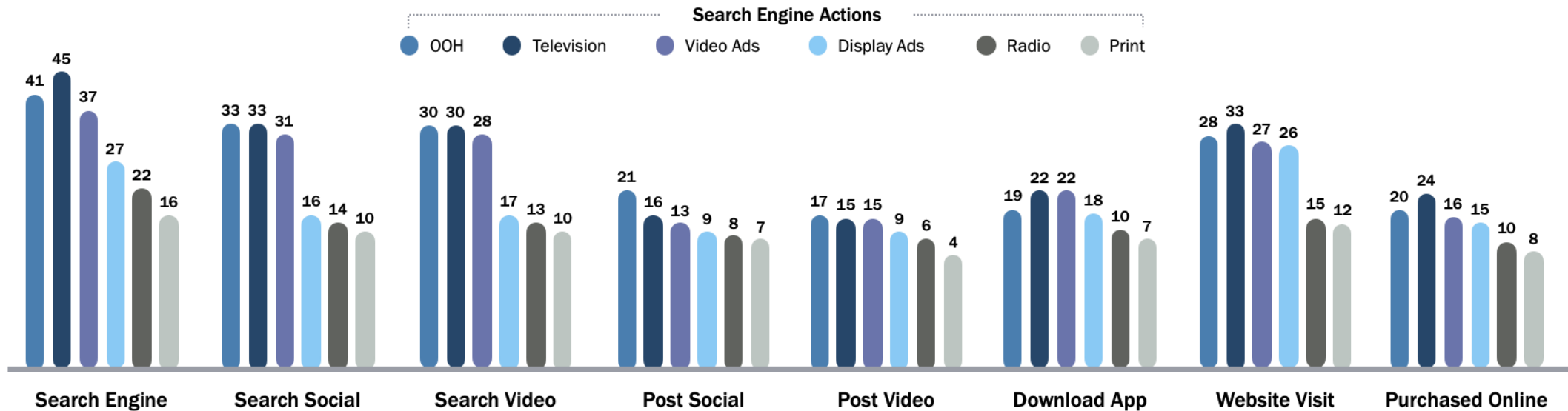
30% searched for video

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

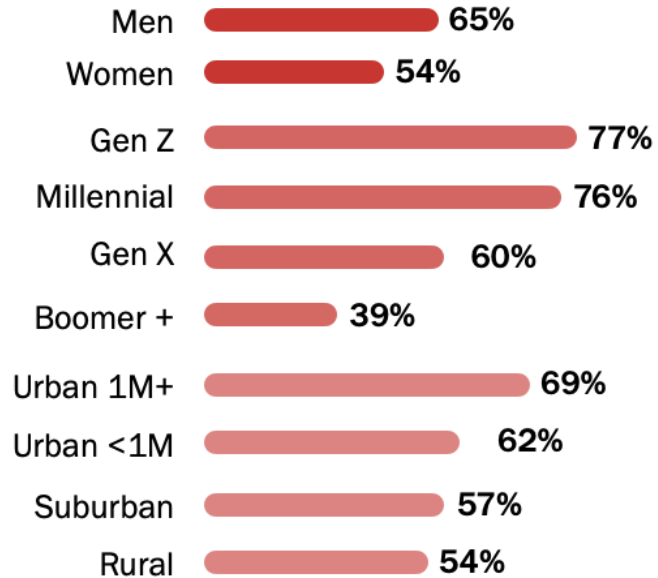


Source: The Harris Poll

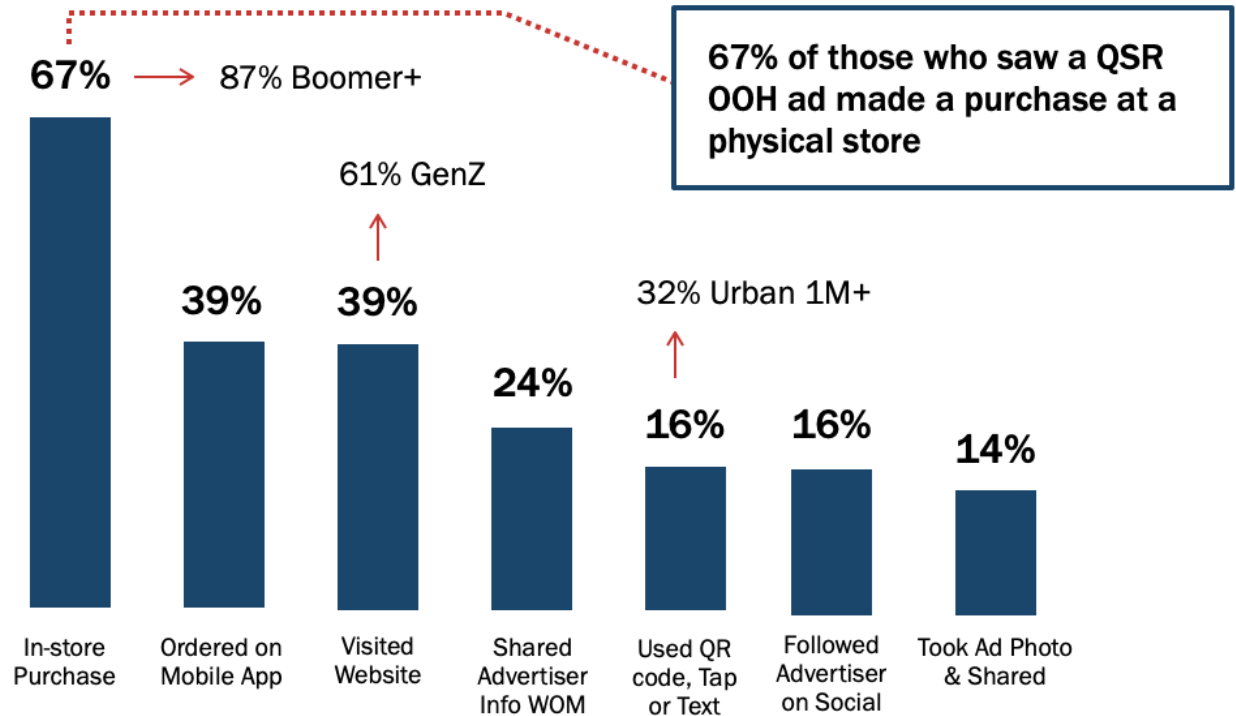
OOH Reaches QSR Consumers → Drives Sales

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

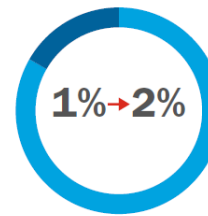


Increases of even a few points of share to OOH achieves the vast majority of total plan optimization

Key Findings

ROAS Impact of Boosting OOH Media Plan Share

Automotive



OOH share shift from 1% to 2%

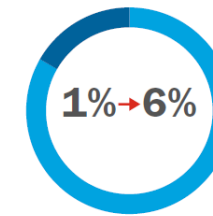
75%

capture of total ROAS optimization

\$52M

ROAS gain generated

CPG Food



OOH share shift from 1% to 6%

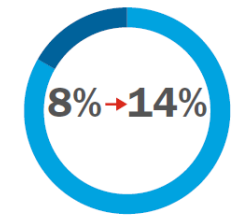
70%

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



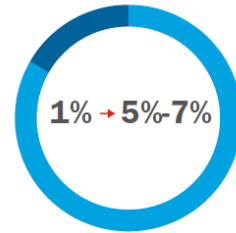
Underfunding OOH prevents total plan optimization due to over allocation to other channels



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ROAS Impact of Boosting OOH Media Plan Share

Automotive

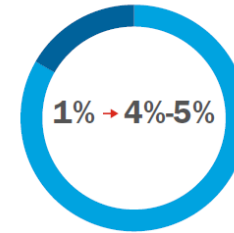


OOH share shift from 1% to a range of 5%-7% dependent on KPI (awareness, consideration, purchase intent) achieves

89%-96%

of total brand metric optimization

CPG Food

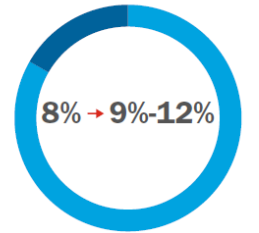


OOH share shift from 1% to a range of 4%-5% dependent on KPI (awareness, consideration, purchase intent) achieves

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%

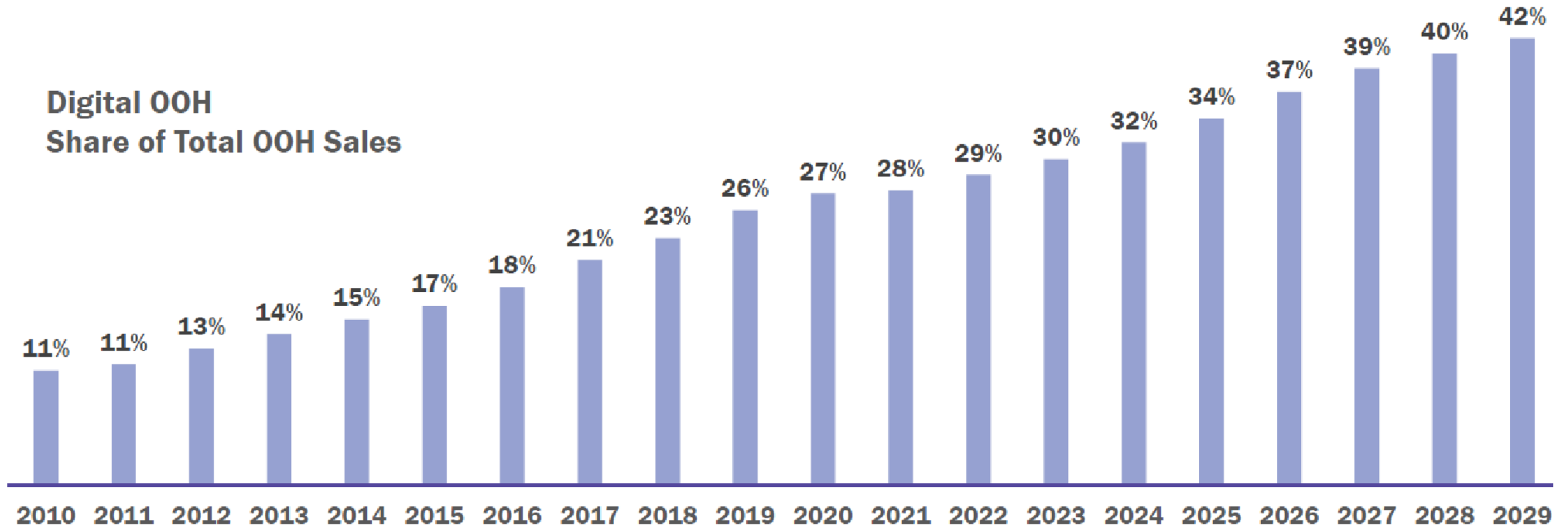
of total brand metric optimization

Digital Transformation



MAGNA: DOOH Share of Total OOH Spend 2010 - 2029

Digital OOH
Share of Total OOH Sales

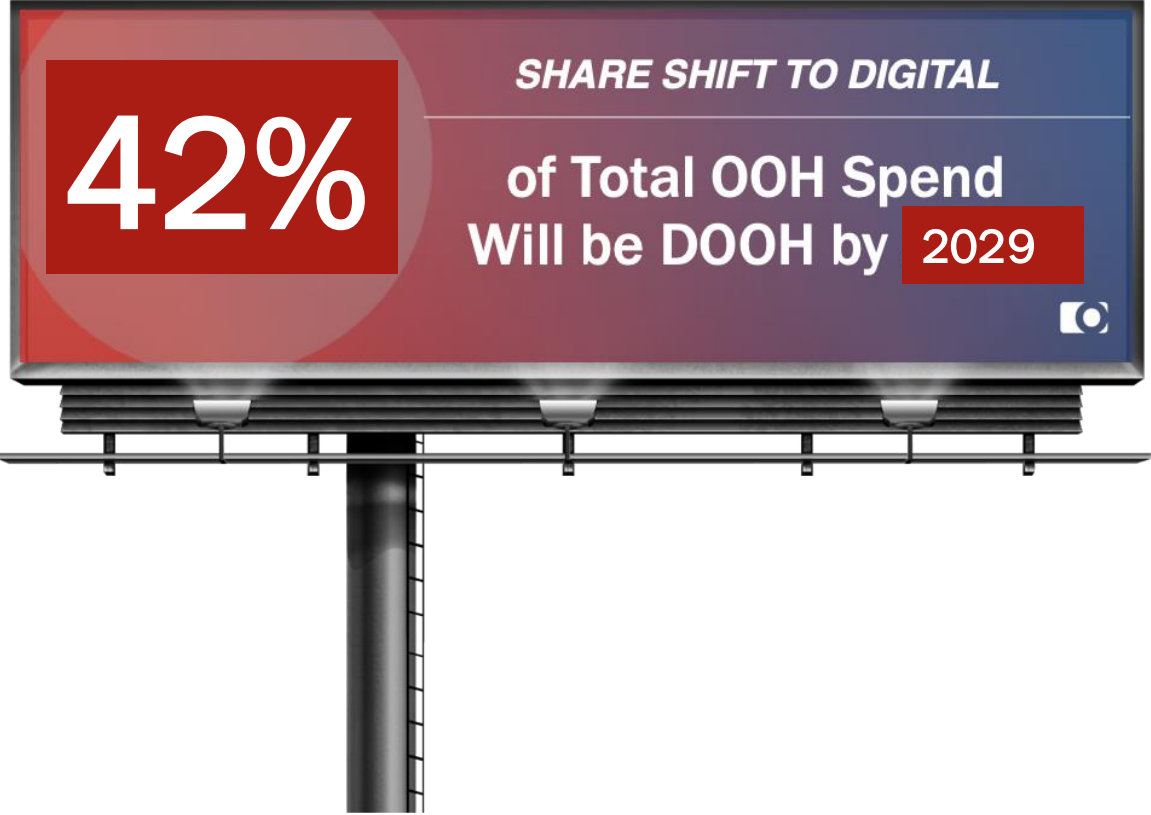


Source: MAGNA (Dec 2024); excludes cinema

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



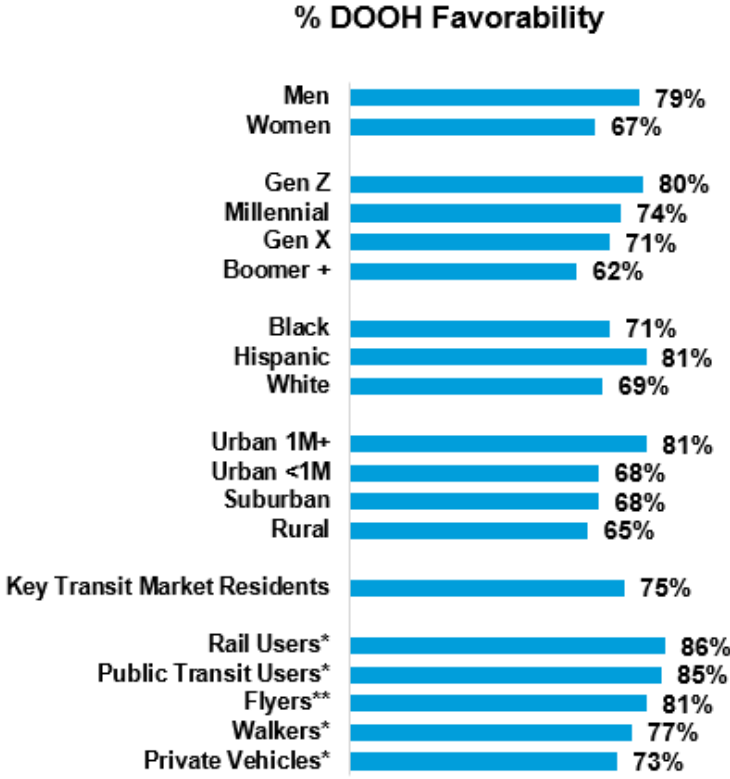
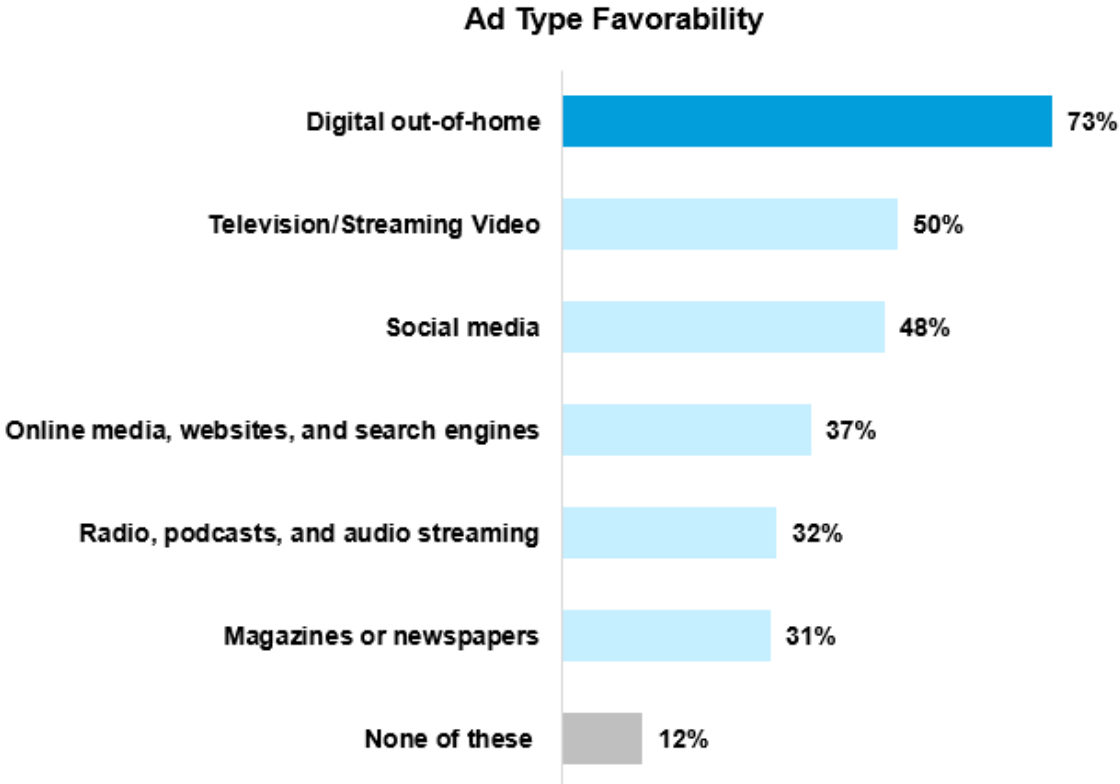
62%

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.



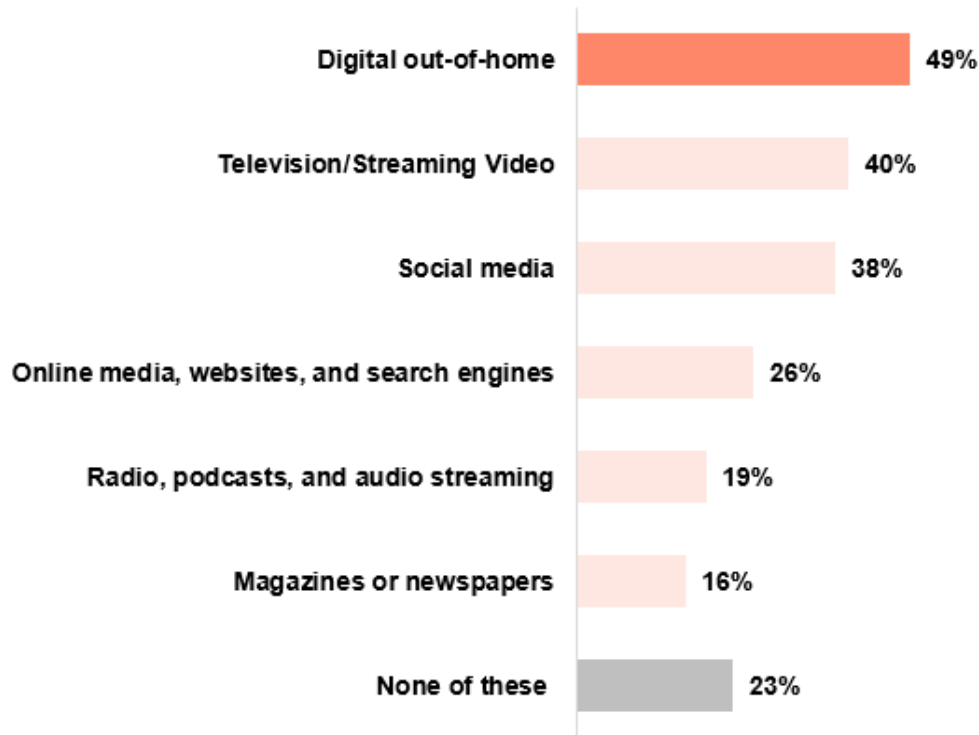
* Past Month
 ** Past 12 Months

Source: The Harris Poll

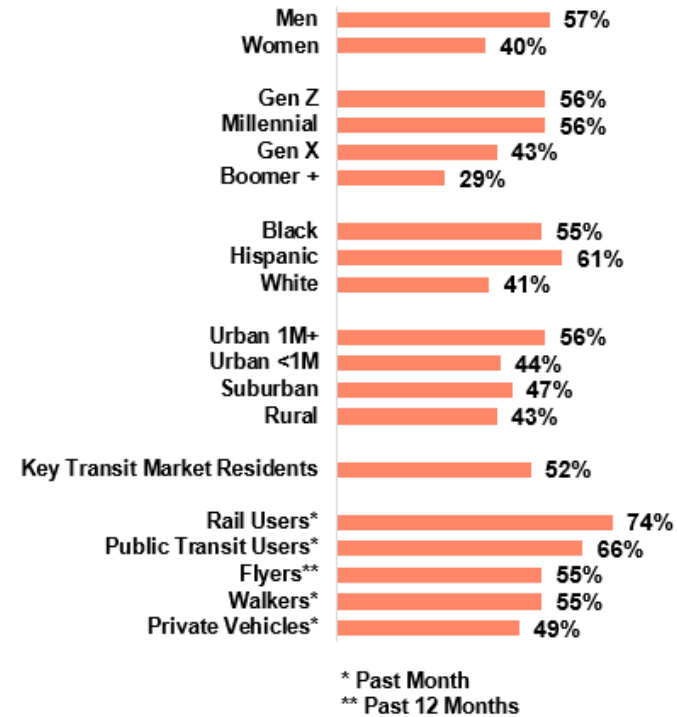
Digital OOH: Ad Format Most Likely to Drive Consumer Action

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

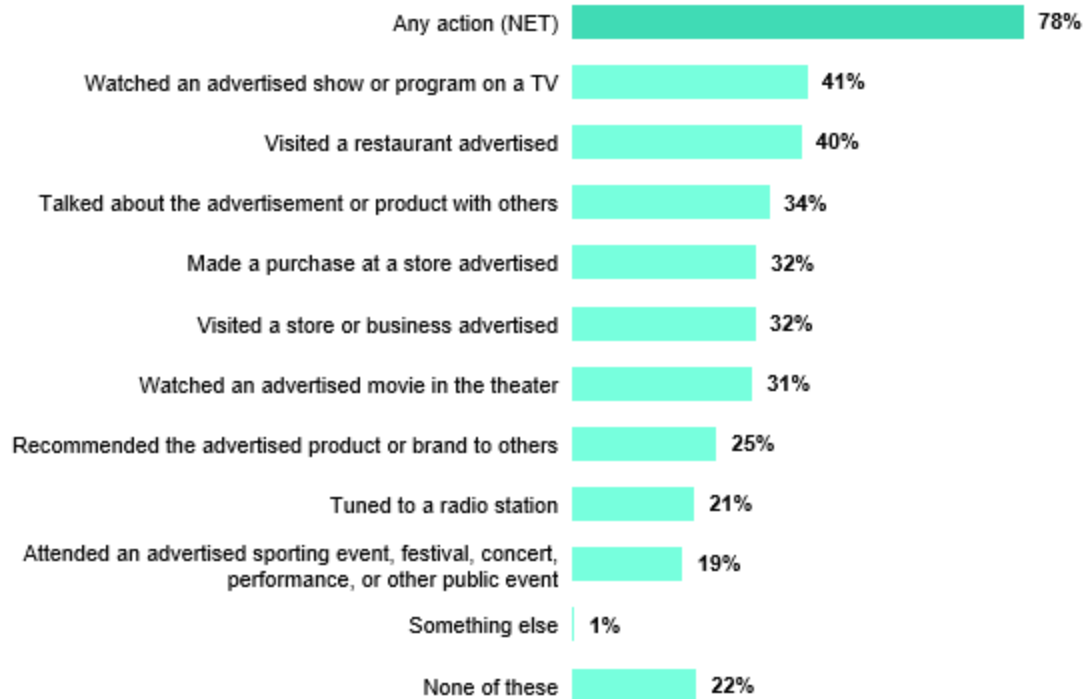


Source: The Harris Poll

Consumer Actions Most Likely Driven by DOOH Billboard Ads

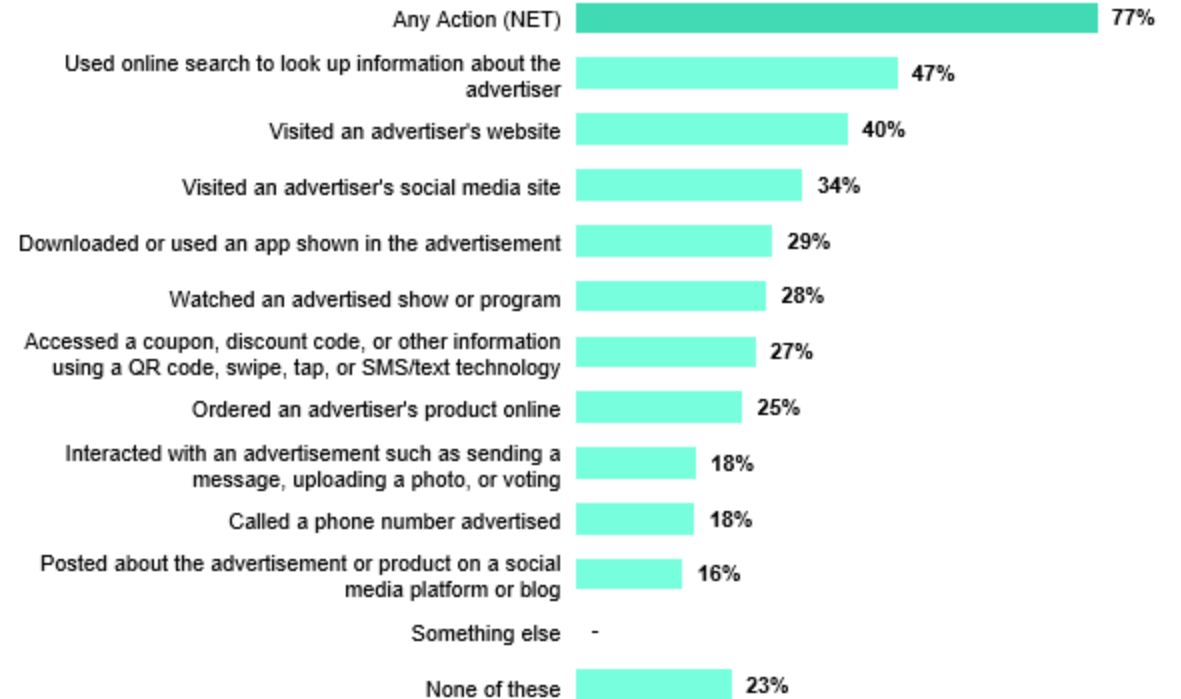
Actions Taken by Digital Billboard Ad Viewers

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



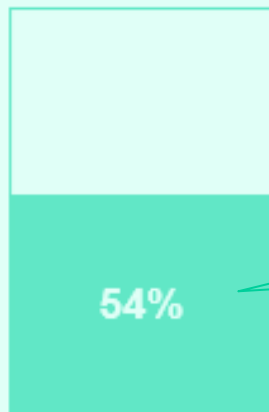
Source: The Harris Poll

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

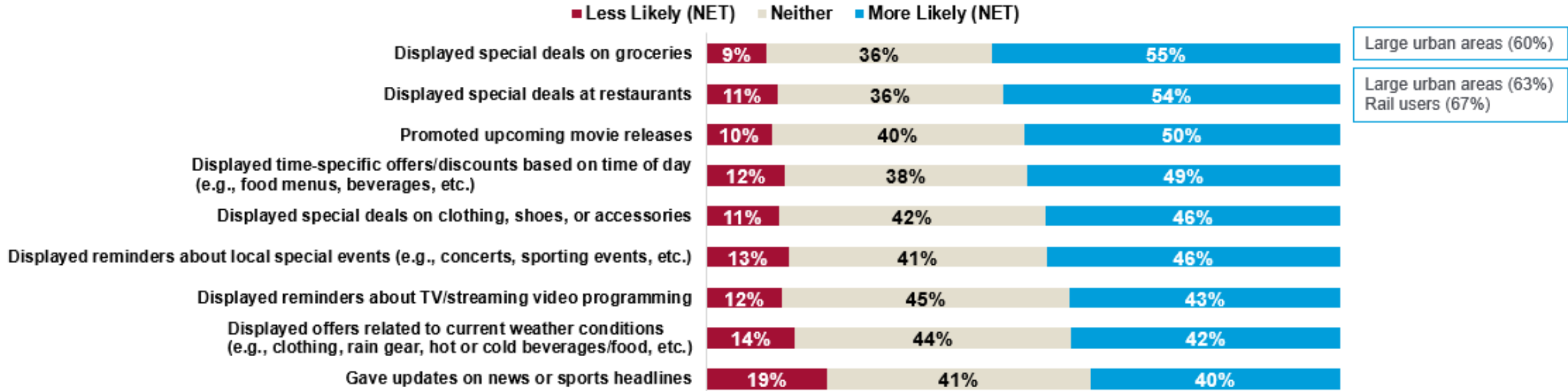
US Adults	40%
Millennials	45%
Bachelor's Degree	45%
Urban Residents	45%
Hispanic Americans	46%
Household Income \$100K+	51%
Adults 30 - 44	51%
Post-Graduate Degree	56%



Source: The Harris Poll

DOOH Ad Content Most Likely to Drive Consumer Engagement

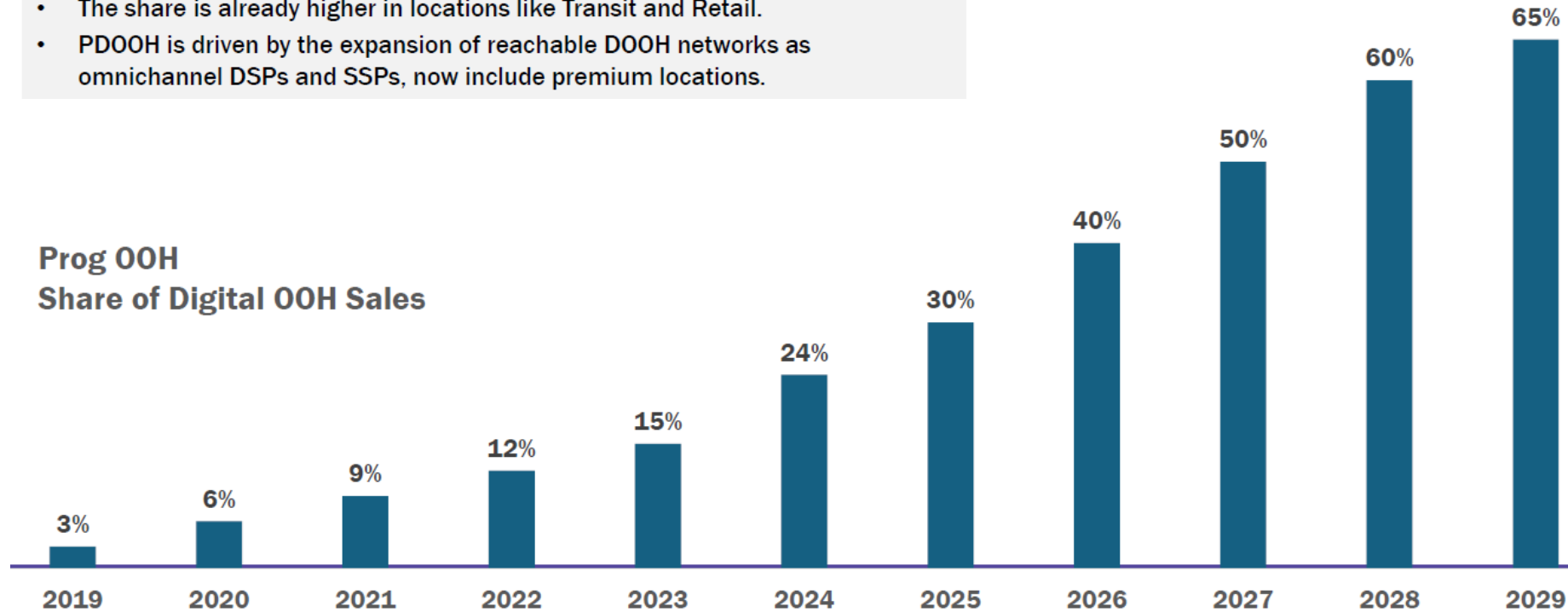
Likelihood To Notice DOOH Ads By Content Attributes



Source: The Harris Poll

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