

OOH Media Opportunities: Consumer Insights and Intent - Early 2022

November 18, 2021



Out of Home Advertising Association of America



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Dates

October 20th to 25th, 2021



Survey Length

10 minutes



Method

Online



Audience

**1,000 General Public,
Adults 18+**

Data is weighted to reflect the U.S. general public across age, gender, race/ethnicity, region, income, household size, and employment.



Key Takeaways

- **COVID isn't holding back (most) future consumer travel:** three-quarters (74%) of workers are commuting right now and even more (78%) will be doing so in early 2022. Nearly half (48%) have either made their 2022 vacation plans (26%) or will do so regardless of COVID (22%); only (27%) are waiting to see what the state of COVID is before making plans. Four in 10 (42%) plan to live as normally as possible this winter, nearly double that from last winter (23%).
- **OOH continues to be relevant amid the pandemic:** over 4 in 10 (42%) are noticing OOH more, and consumers noticing OOH “much more” up 9-pts from September 2020. Consumers find OOH ads about retail (63%), fast food (62%), food and beverage (60%) to be the most relevant to their interests.
- **Social media amplifies OOH awareness:** over two-thirds (67%) of both Gen Z and Millennials recall seeing OOH ads reposted on social media. And social media cross-posting drives engagement: consumers say they would be likely to visit the advertisers online (55%) or their physical stores (48%).
- **Most have engaged with OOH:** (57%) of consumers have engaged with an OOH ad in some way, whether it's visiting the advertiser's website (43%), searching for more information about the advertiser or their products (39%), or made a physical purchase (39%). Engagement is especially high in large urban areas, in which (77%) of consumers have engaged with an OOH ad.
- **What drives engagement with OOH?** Millennials, Gen Zers, and Urbanites are most likely to stop and read OOH that featured their favorite brand or product, was something creative or artistic aligned with their values, highlighted local businesses, or featured their favorite artist or celebrity.
- **Customizable OOH increases interest:** Interactive, customizable OOH ads drive greater interest, with almost half (45%) saying these types of ads are more interesting - including (65%) of major Urbanites and (58%) of Millennials.



Part 1:
The State of American Consumer
Amid the Pandemic

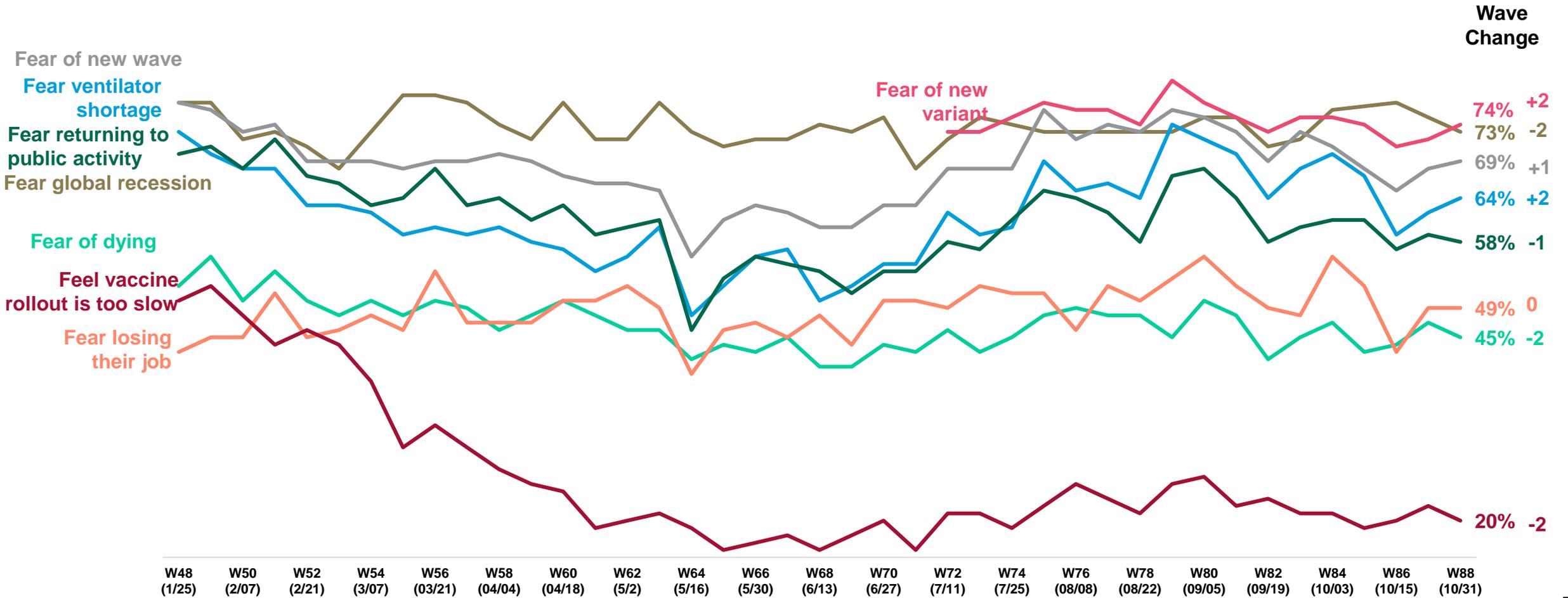


Despite a Receding Pandemic, Fear Has Yet to Stabilize

54% thought national fear was irrational

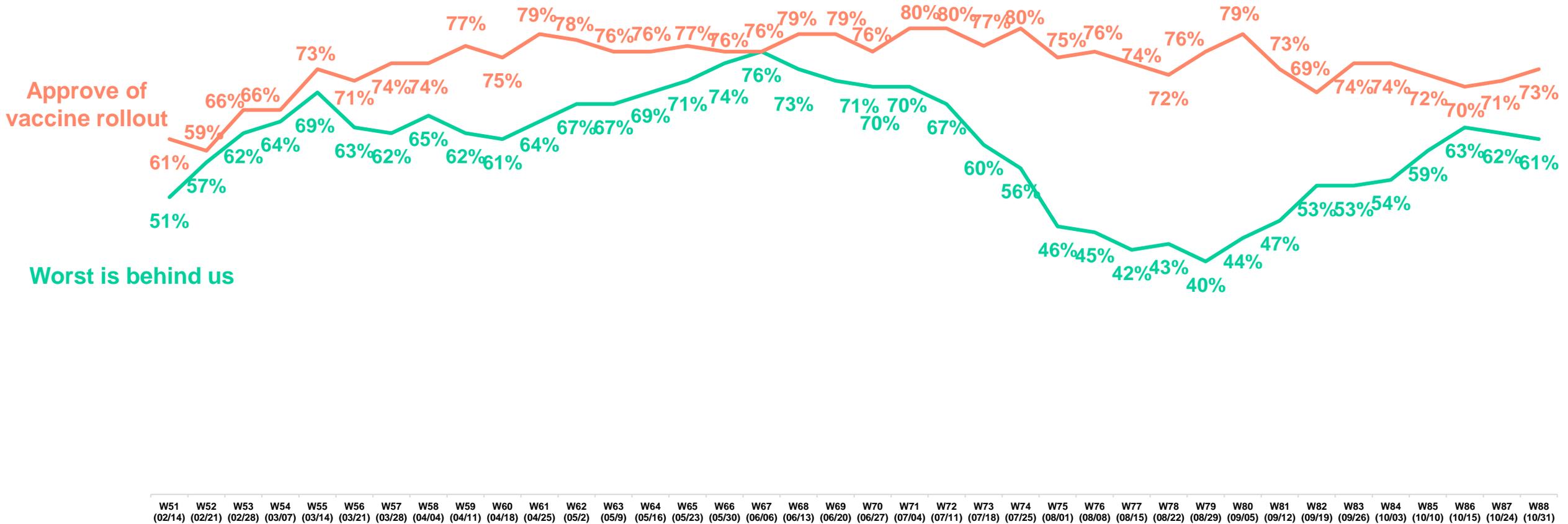
Trended Fear Curves During COVID-19

66% now think national fear is sensible





But Optimism Is Returning



Source: Harris Poll COVID19 Tracker Wave 88 (10/29-31/2021)

BASE: GENERAL PUBLIC W88 (n=2024)

RTN02 At the moment, do you approve or disapprove of how the distribution of the COVID-19 vaccine is being handled here in the U.S.?

CFP03. Do you believe the worst of COVID-19 is behind us or is the worst still ahead of us?

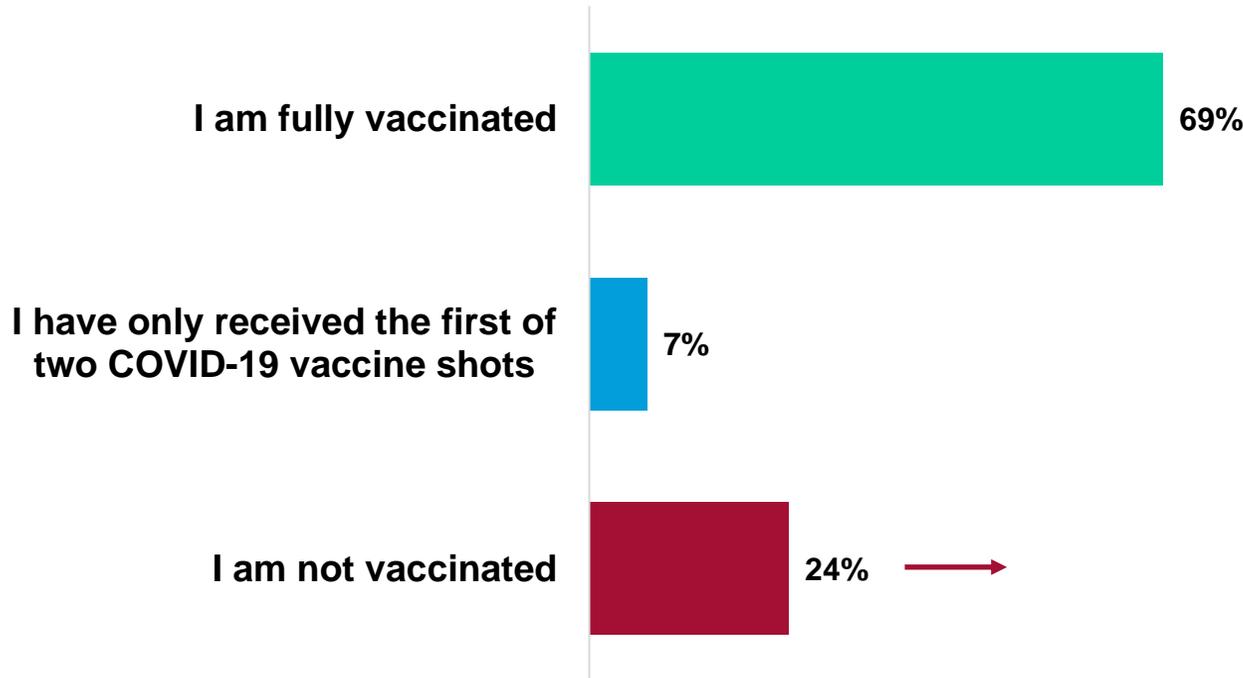
Harris Insights & Analytics LLC, A Stagwell Company © 2021



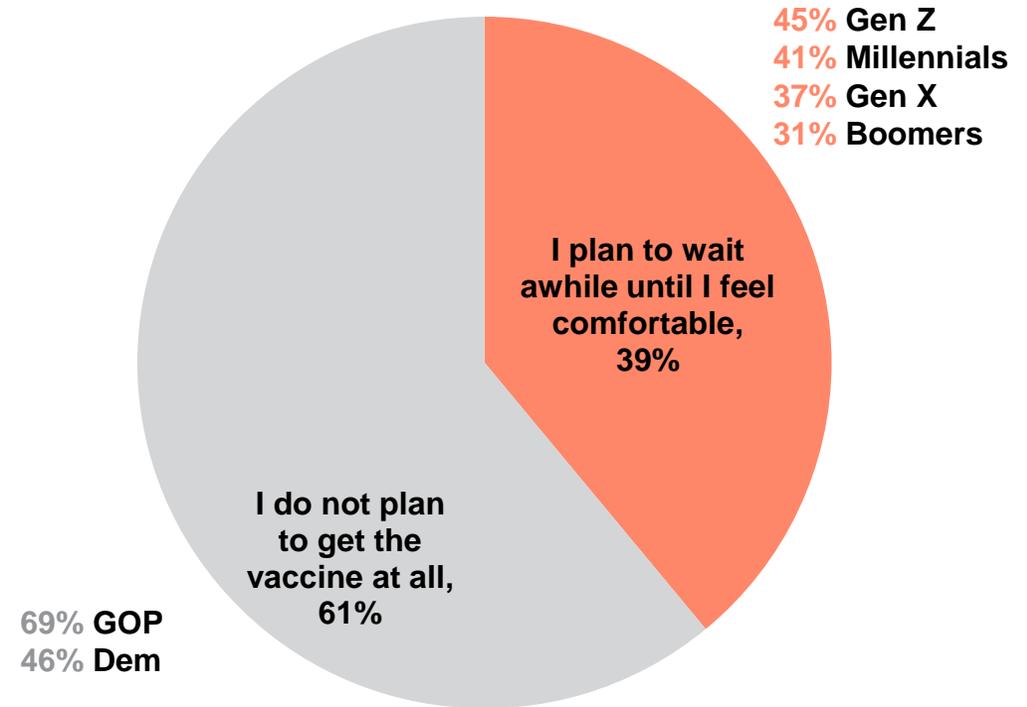
Three-Quarters of American Adults Are Vaccinated

While Over Half of Those Unvaccinated Say They Don't Plan to Get One

Which of the following applies to you regarding the COVID-19 vaccine?



Which of the following best describes your mindset to getting the COVID-19 vaccine in the future?
Among unvaccinated



Source: Harris Poll COVID19 Tracker Wave 88 (10/29-31/2021)

BASE: GENERAL PUBLIC W88 (n=2024)

VCE1a. Which of the following applies to you regarding the COVID-19 vaccine?

BASE: UNVACCINATED W88 (n=480)

VCE1b. Which of the following best describes your mindset to getting the COVID-19 vaccine in the future?

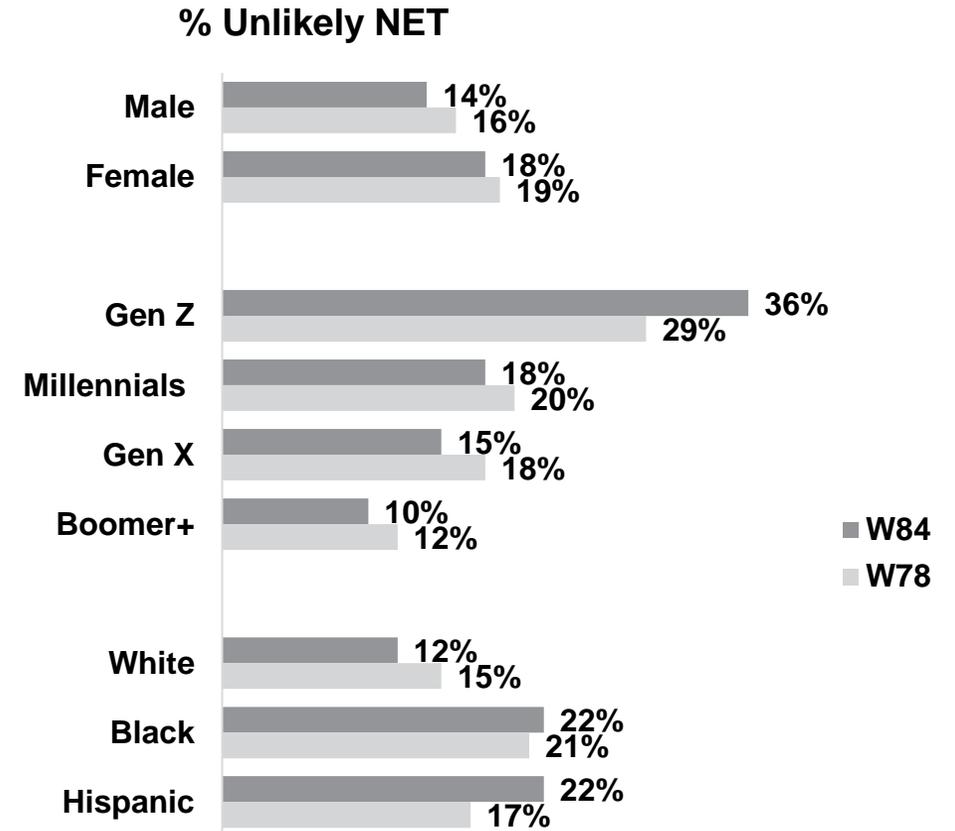
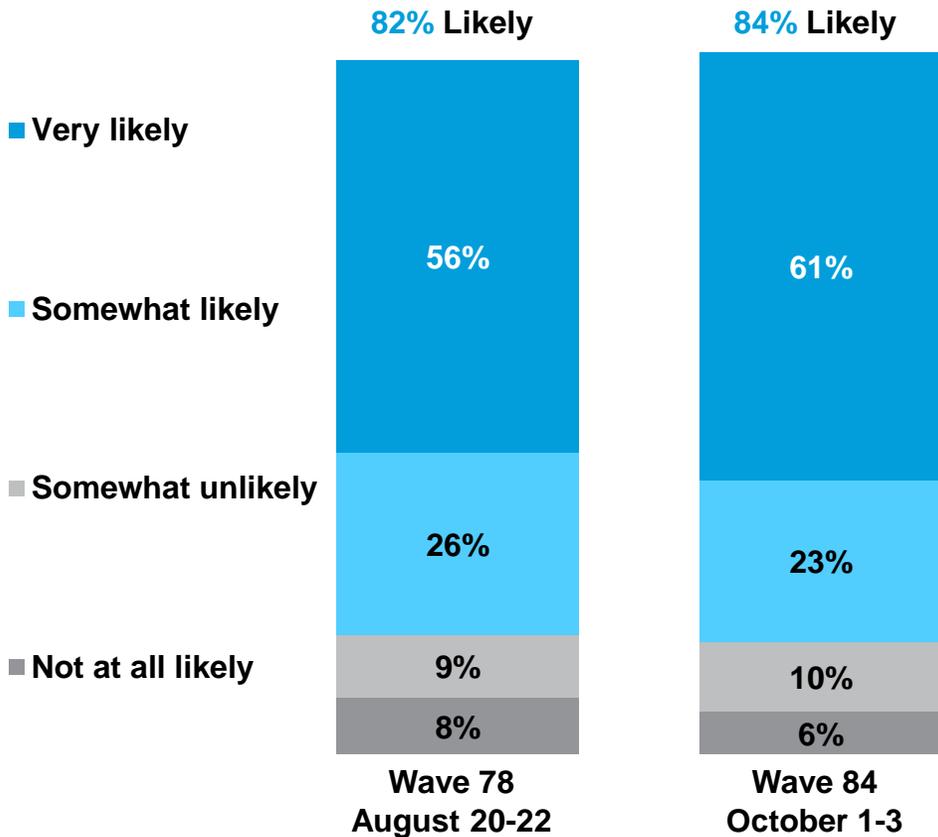
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Likelihood to Get COVID Booster Remains High Among Vaccinated Americans

Over One-Third of Vaccinated Gen Zers Are Unlikely to Get a Booster

How likely are you to get a booster shot once it becomes available to you?
Among vaccinated Americans



Source: Harris Poll COVID19 Tracker Wave 84 (10/01-10/03/21)
BASE: ALREADY VACCINATED W78 (n=1789); W84 (n=1510)

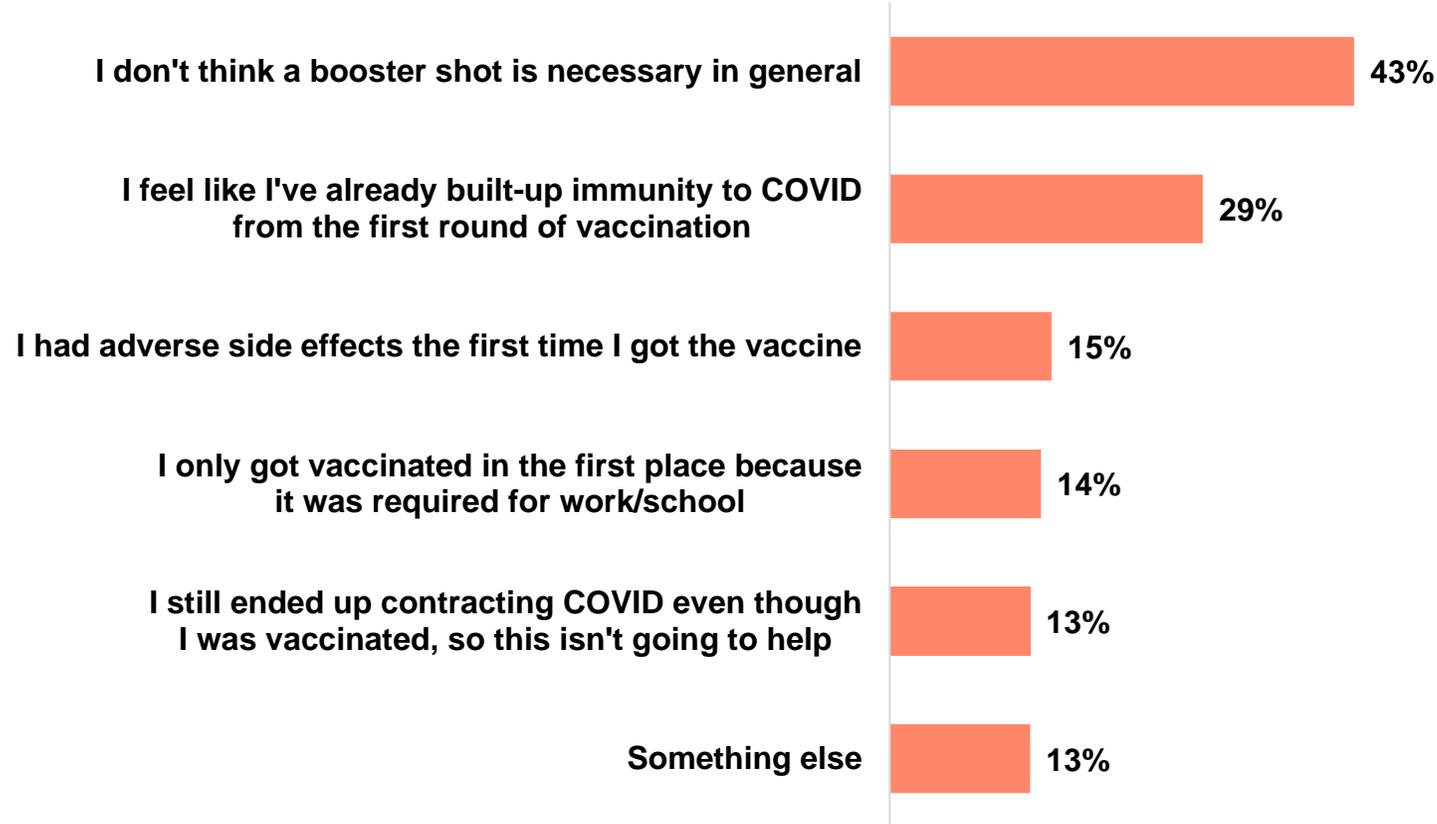
BOS02. This past week, U.S. health officials announced that booster shots are recommended 8 months after the final of the COVID vaccine. How likely are you to get a booster shot once it becomes available to you?

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But Necessity Is the Biggest Deterrent for Those Not Likely to Get a Booster

Why are you not likely to get a booster shot once it becomes available to you?
Among vaccinated who will not get booster shot



Source: Harris Poll COVID19 Tracker Wave 84 (10/01-10/03/21)

BASE: VACCINATED BUT WILL NOT GET BOOSTER_W84 (n=195)

BOS02a. Why are you not likely to get a booster shot once it becomes available to you?

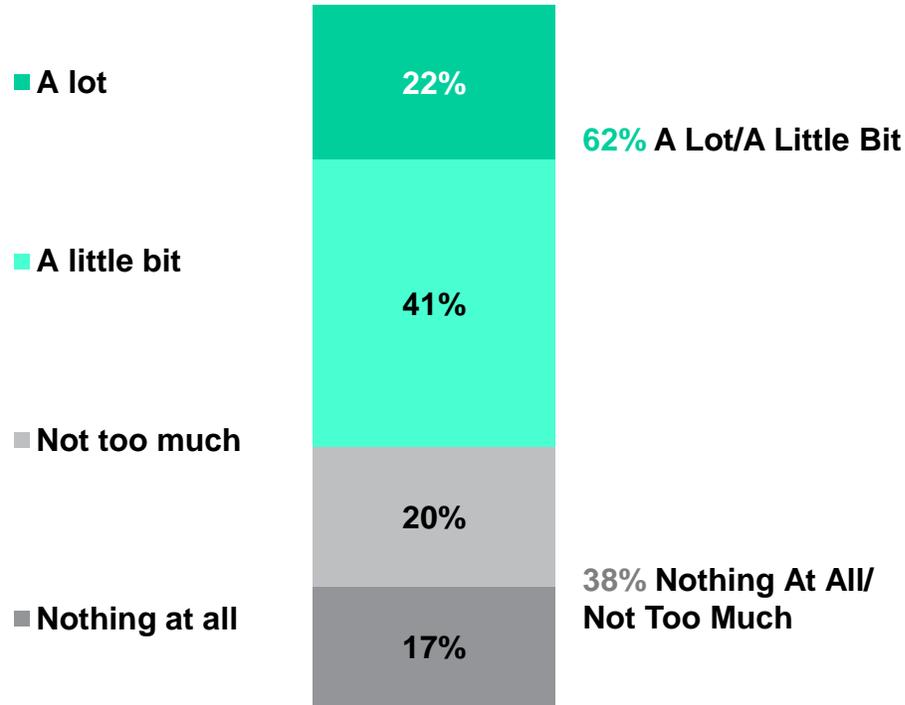
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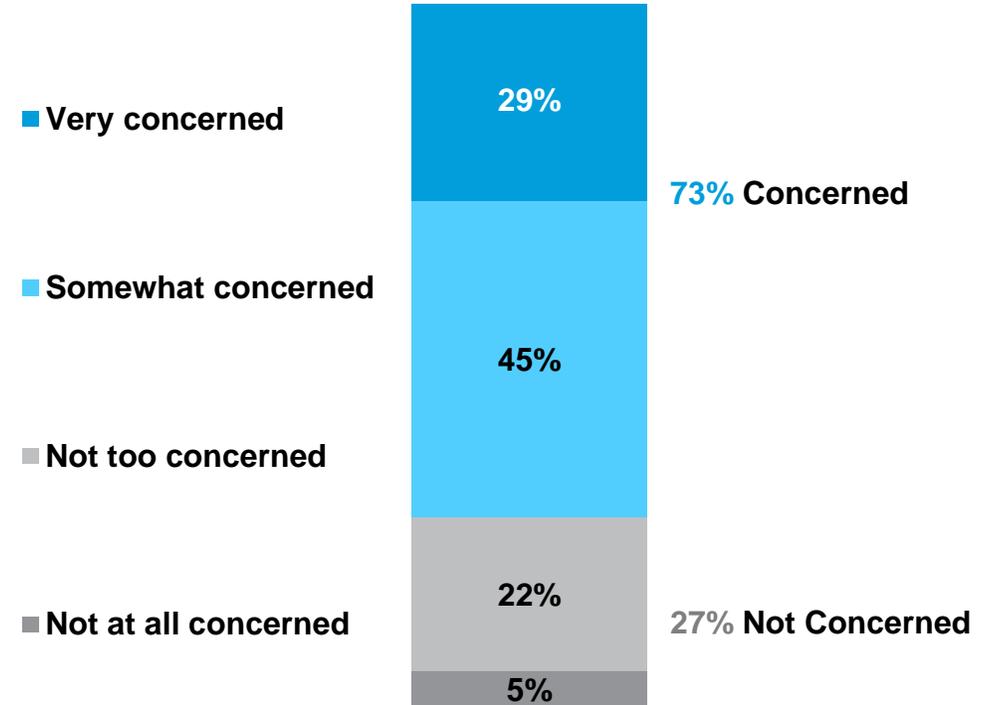
Americans Are Still Following COVID Case News Around The Country

And Three-Quarters of Those Vaccinated Are Concerned About Breakthrough Cases

Recently, some states in the U.S., like Colorado, are experiencing rising COVID cases, hospitalizations, and deaths. How much have you read, seen, or heard about this?



How concerned are you about getting a breakthrough case of COVID-19 due to the fact that other states are experiencing a rise in cases despite high vaccination rates?
Among vaccinated aware of rising cases



Source: Harris Poll COVID19 Tracker Wave 87 (10/22-10/24/21)

BASE: GENERAL PUBLIC W87 (n=2010)

CCR1. Recently, some states in the U.S., like Colorado, are experiencing rising COVID cases, hospitalizations, and deaths. How much have you read, seen, or heard about this?

BASE: VACCINATED AND AWARE OF RISING CASES W87 (n=1309)

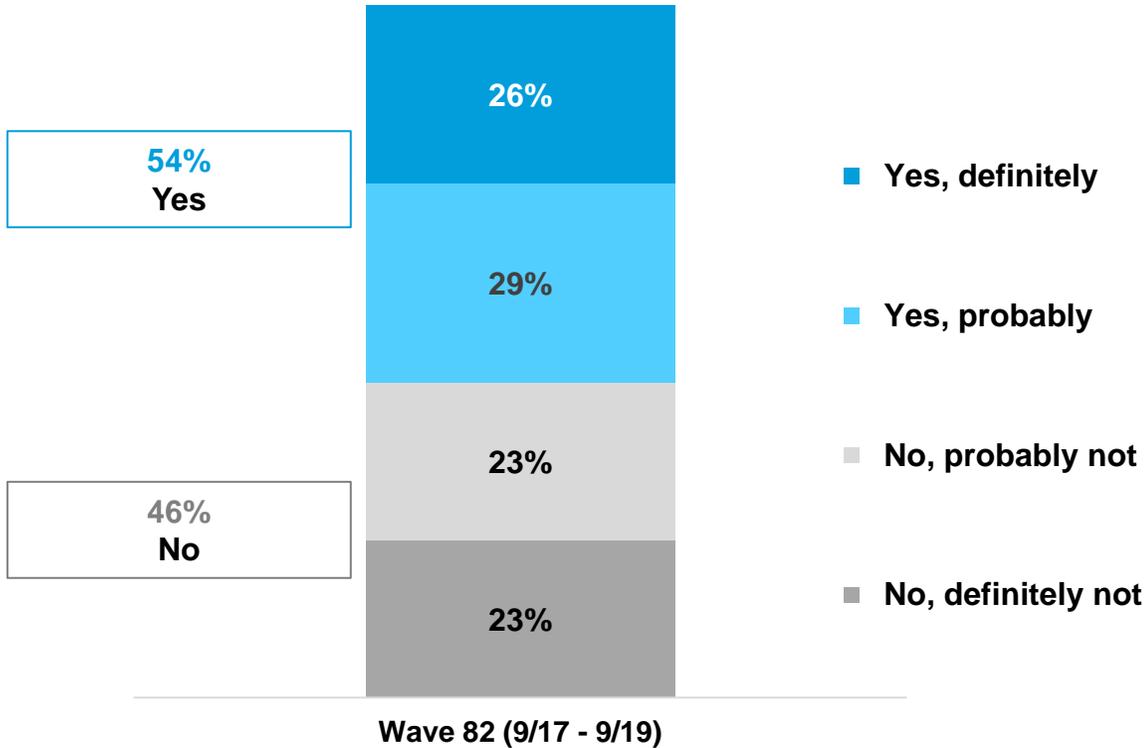
CCR2. How concerned are you about getting a breakthrough case of COVID-19 due to the fact that other states are experiencing a rise in cases despite high vaccination rates?

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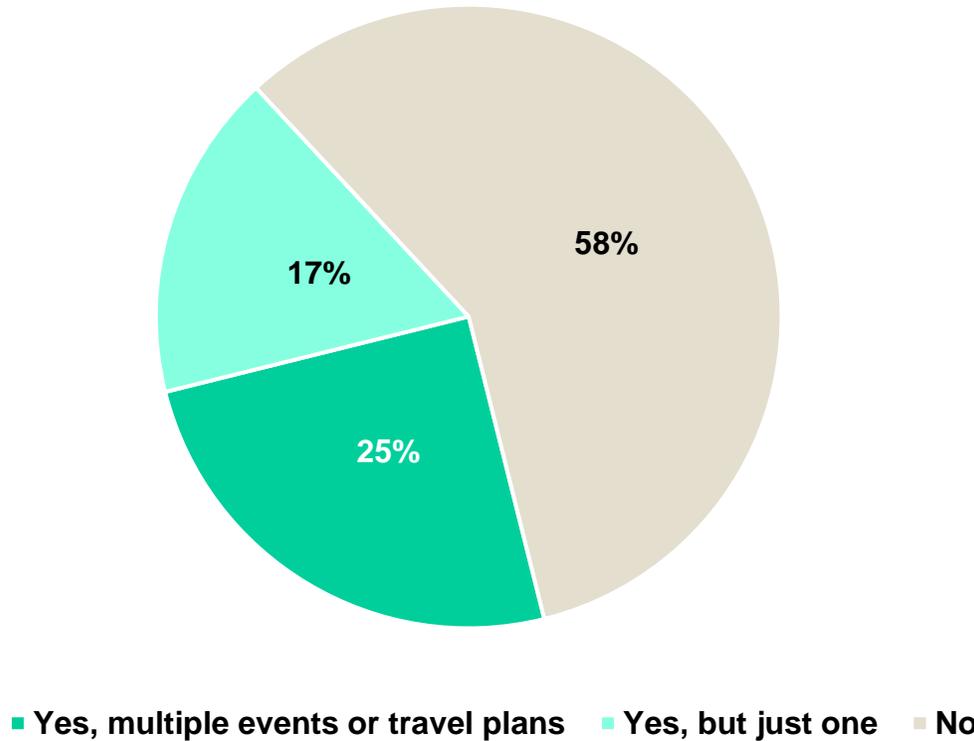
Over Half of Americans Say Others' Vaccination Status Will Impact Holiday Plans

Thinking about future holiday plans, will other people's vaccination status be a factor in deciding whether or not you will travel or attend events?



Have you canceled any existing travel or other major plans with people because they were unvaccinated?

Among vaccinated



Source: Harris Poll COVID19 Tracker Wave 82 (9/17-9/19/21)

BASE: GENERAL PUBLIC W82 (n=2055)

VCW08. Thinking about future holiday plans, will other people's vaccination status be a factor in deciding whether or not you will travel or attend events?

BASE: VACCINATED W82 (n=1454)

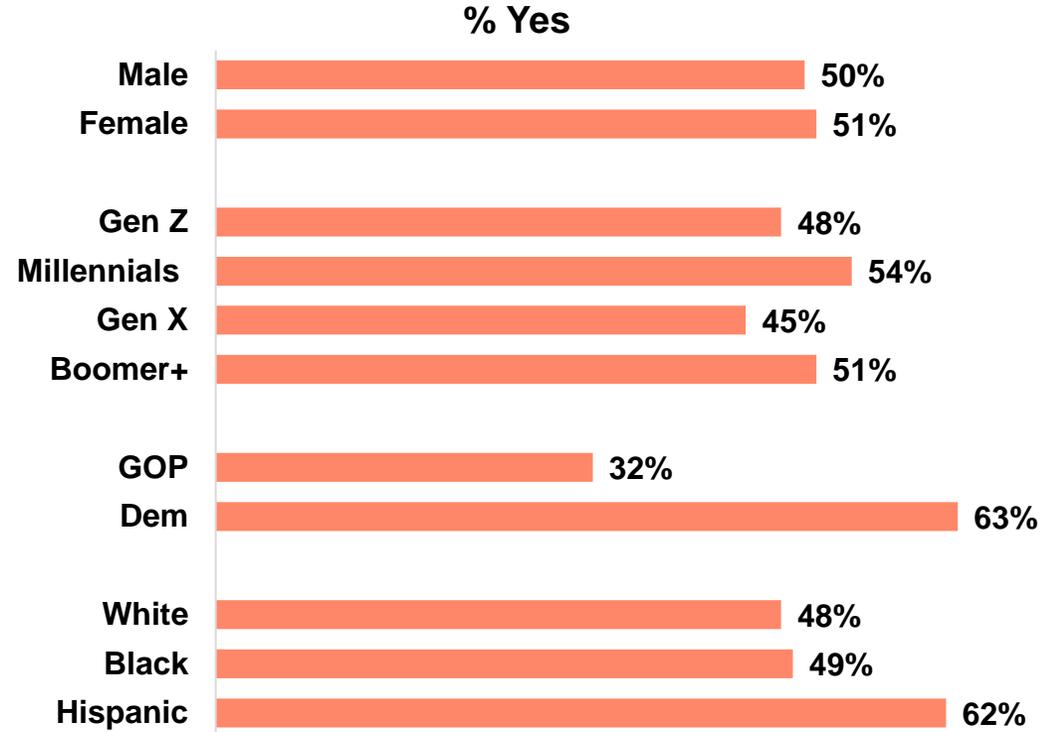
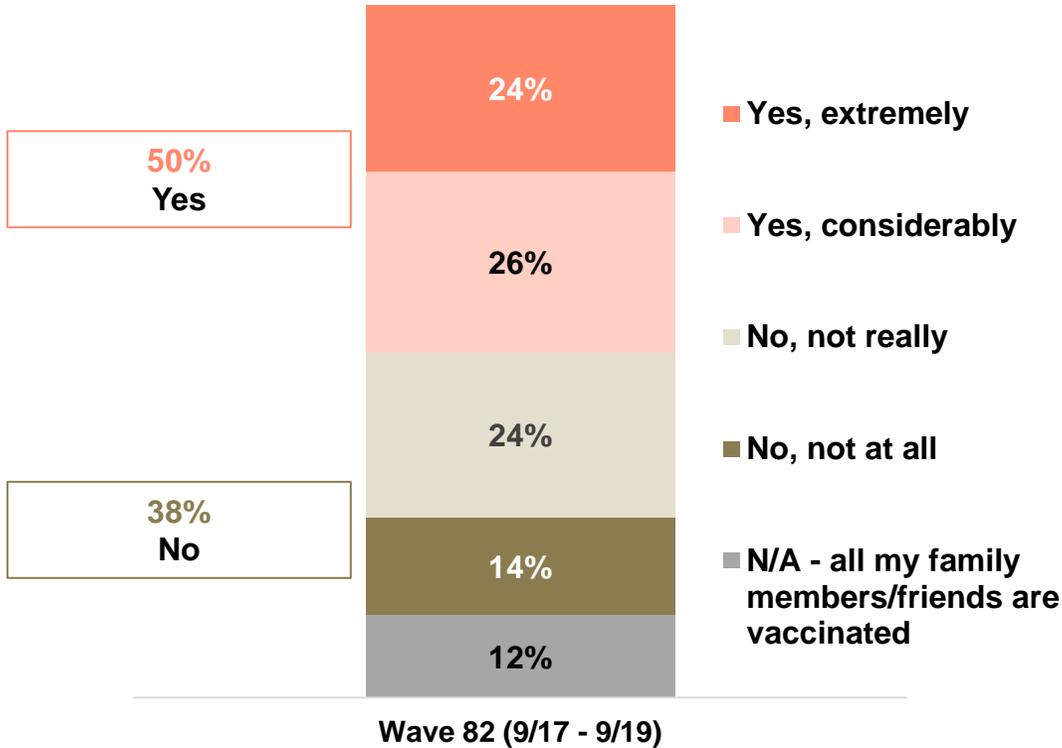
Have you canceled any existing travel or other major plans with people because they were unvaccinated?

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Half of Vaccinated Americans Are Hesitant to Spend Holidays with Unvaccinated

Are you hesitant to spend holidays with unvaccinated family members or friends?
Among vaccinated



Source: Harris Poll COVID19 Tracker Wave 82 (9/17-9/19/21)

BASE: VACCINATED W82 (n=1454)

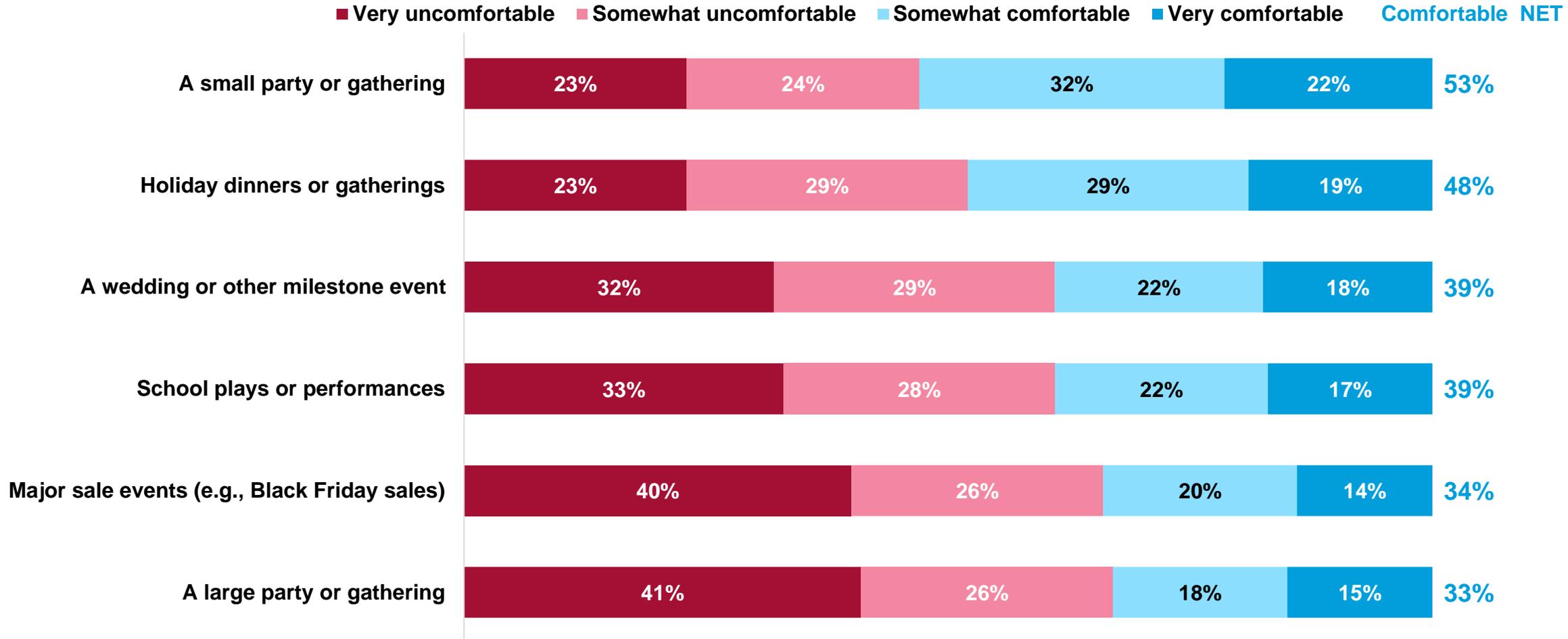
VCW10. Are you hesitant to spend holidays with unvaccinated family members or friends?

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Vaccinated Americans Are Uncomfortable Socializing with Those Unvaccinated

How comfortable would you be to attend the following events knowing that some of the attendees would be unvaccinated?
Among vaccinated



Source: Harris Poll COVID19 Tracker Wave 82 (9/17-9/19/21)

BASE: VACCINATED AND EMPLOYED W82 (n=1454)

VCW11. How comfortable would you be to attend the following events knowing that some of the attendees would be unvaccinated?

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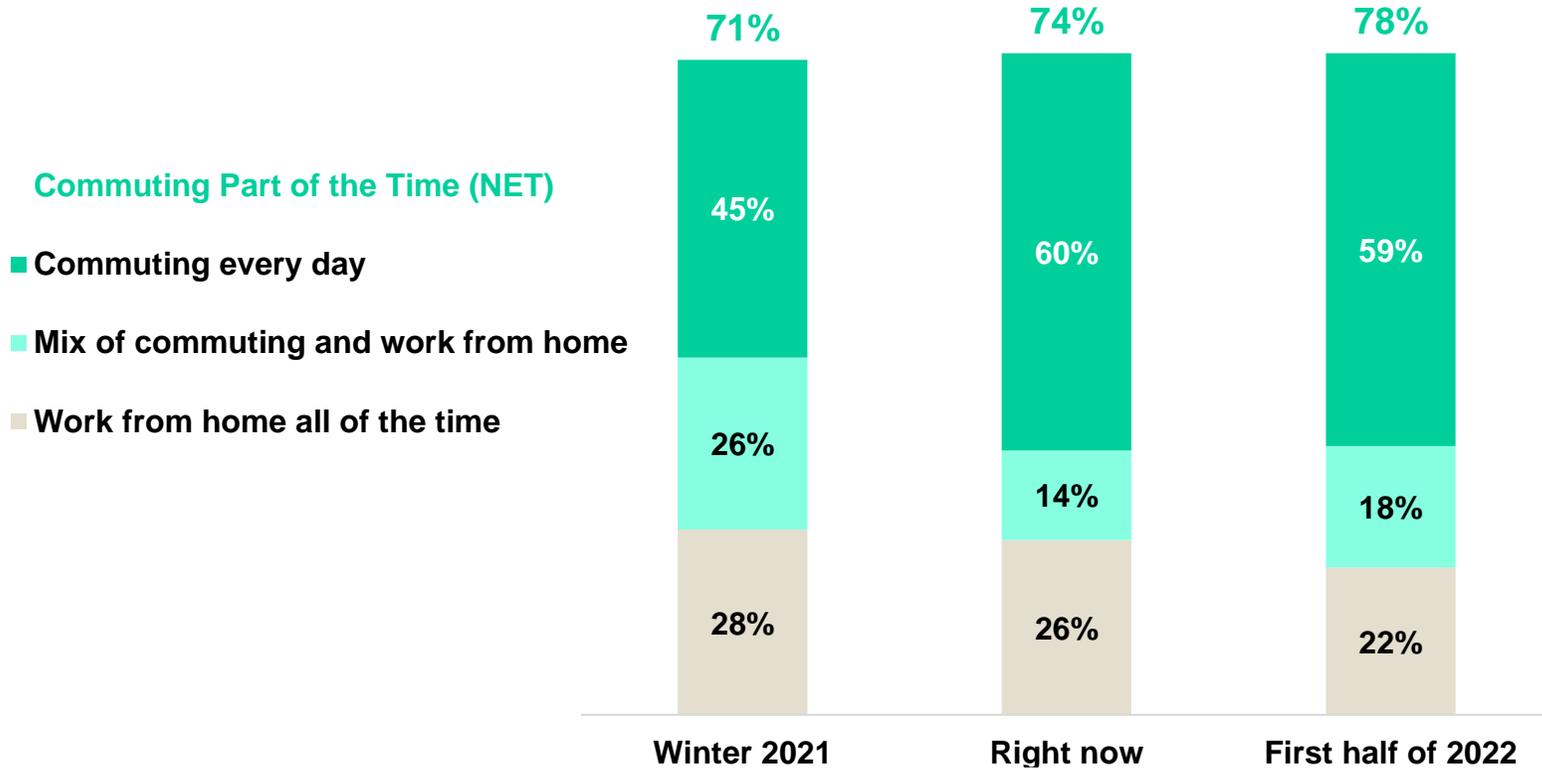


PART 2:
Early 2022 Travel Outlook

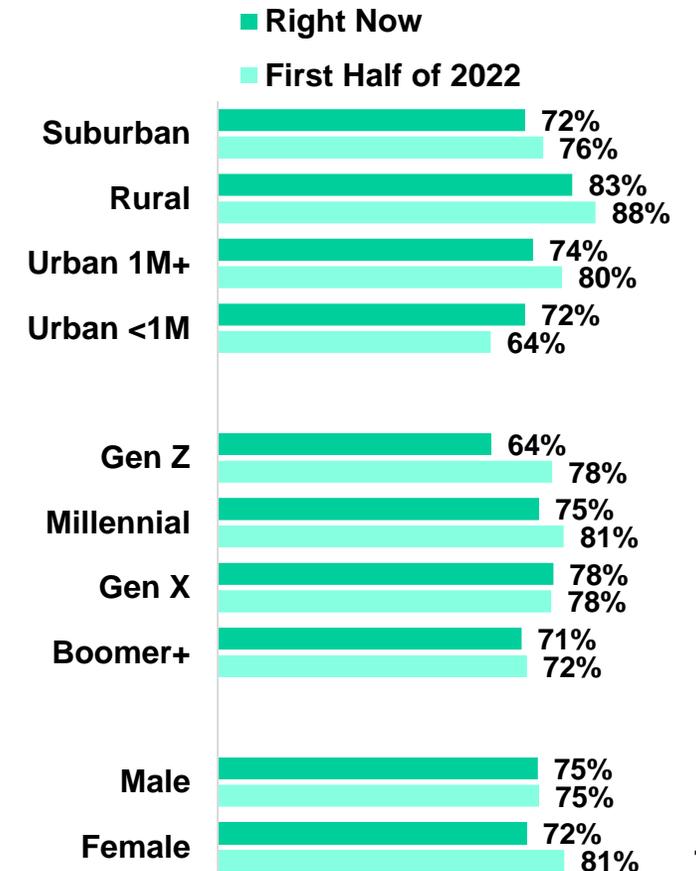


Total Commuters Continue to Grow Through 2022

Thinking ahead, which of the following best describes your expected work situation for each of the following timeframes?



% Commuting Part Time or More (NET)



BASE: EMPLOYED (N=524)

Q1a. Thinking ahead, which of the following best describes your expected work situation for each of the following timeframes?

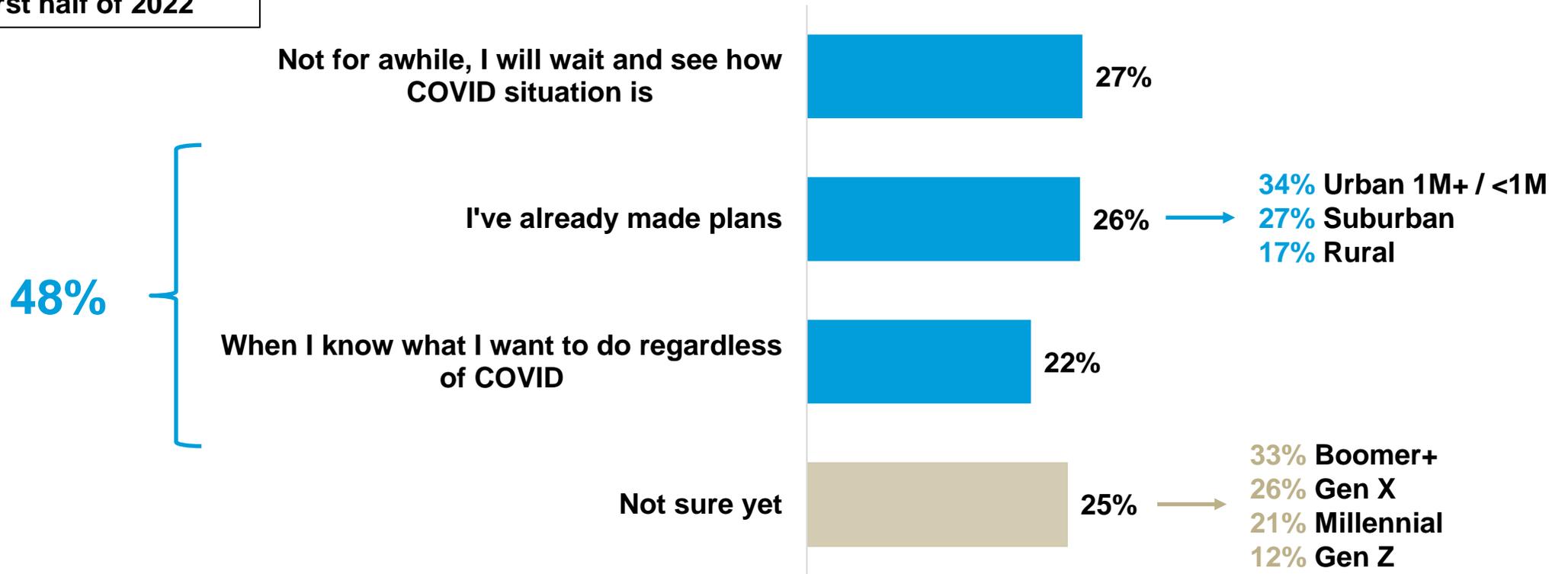
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Nearly Half of Travelers Are Making 2022 Travel Plans Regardless of COVID

Generally speaking, when do you plan to finalize/book your vacation travel plans for the first half of 2022?

72% of Americans plan to travel in the first half of 2022



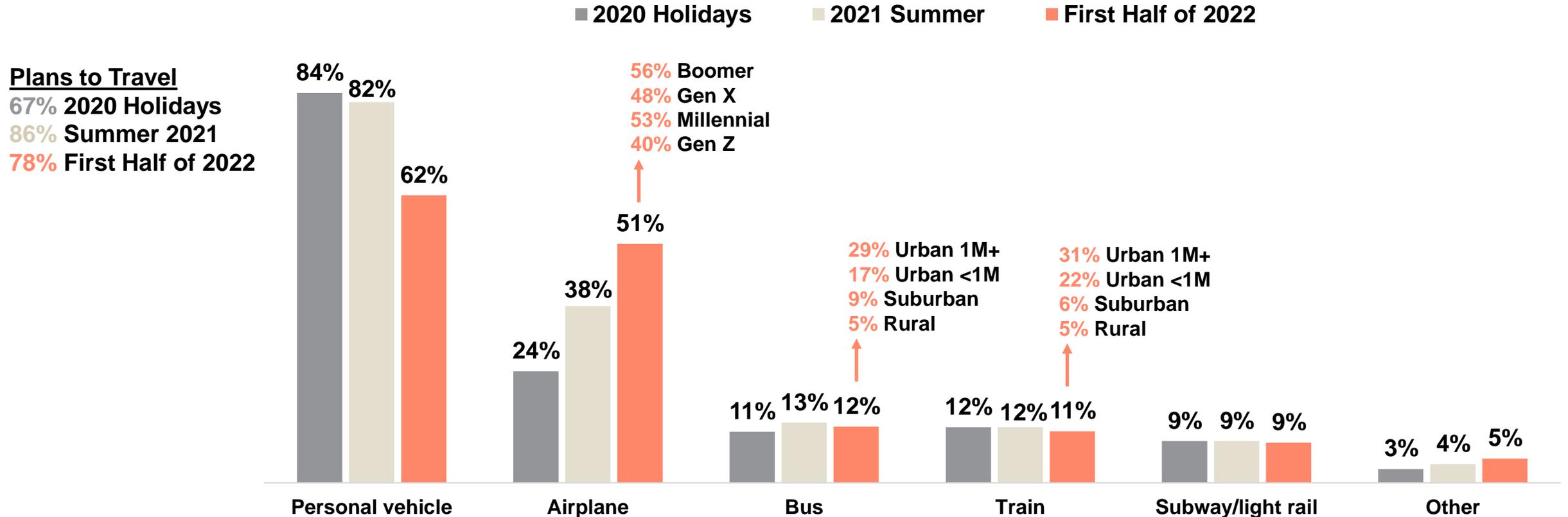
BASE: PLANS TO TRAVEL IN 2022 (N=760)
Q1. Generally speaking, when do you plan to finalize/book your vacation travel plans for the first half of 2022?
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Airlines Will Be Making a Comeback in 2022

Those Using Airlines in 2022 Will Be More More Than Double From 2020 Holidays

Thinking ahead to your vacation travel plans for the first half of 2022, which of the following modes of transportation do you intend to take? Please select all that apply.
Among those planning to travel



Plans to Travel
 67% 2020 Holidays
 86% Summer 2021
 78% First Half of 2022

BASE: PLANS TO TRAVEL 2020 HOLIDAYS (N=1377), 2021 SUMMER (N=854), 2022 (N=760)

Q2. Thinking ahead to your vacation travel plans for the first half of 2022, which of the following modes of transportation do you intend to take? Please select all that apply.

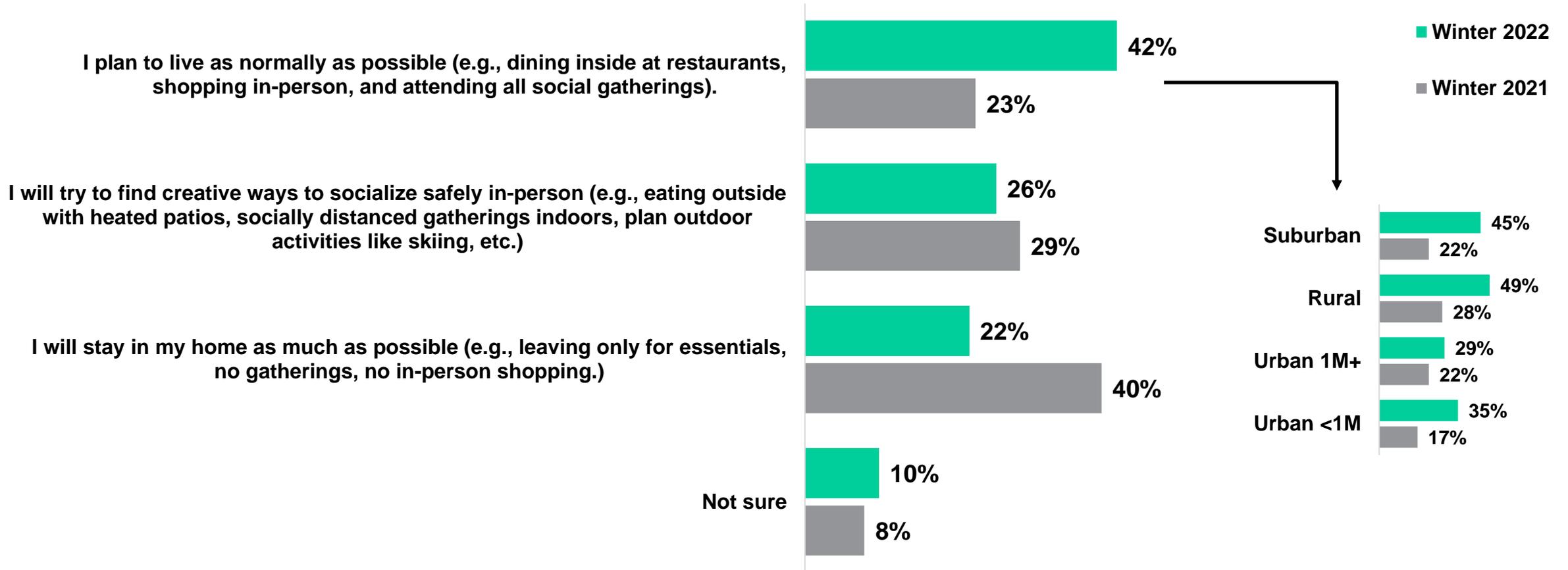
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This Winter Will See Americans Living More Normally Than Last Year

Over 40% Plan to Live as Normally as Possible

Thinking ahead to the upcoming winter months of 2022 with colder weather amid the COVID-19 pandemic, which of the following best describes your mindset to socializing and doing activities?



BASE: GENERAL PUBLIC (N=1,000)

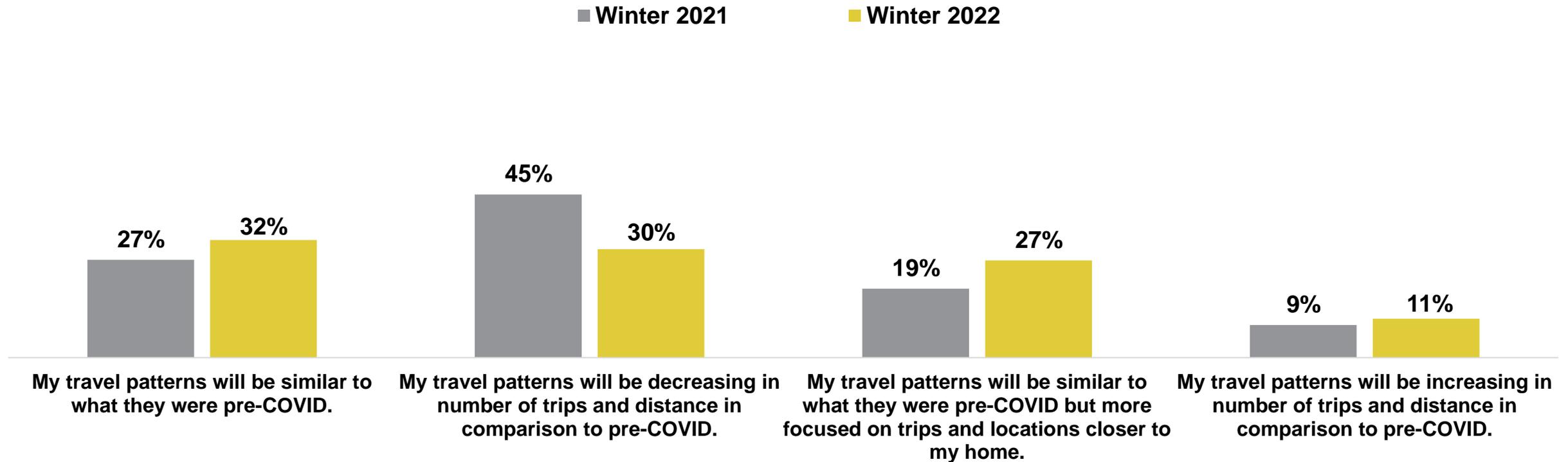
Q3. Thinking ahead to the upcoming winter months of 2022 with colder weather amid the COVID-19 pandemic, which of the following best describes your mindset to socializing and doing activities?

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This Winter, 43% of Americans' Local Travel Patterns Will Be Similar to or Greater than Pre-COVID

Thinking again ahead to the winter of 2022, which statement best aligns with your typical local travel patterns?



BASE: GENERAL PUBLIC (N=1,000)

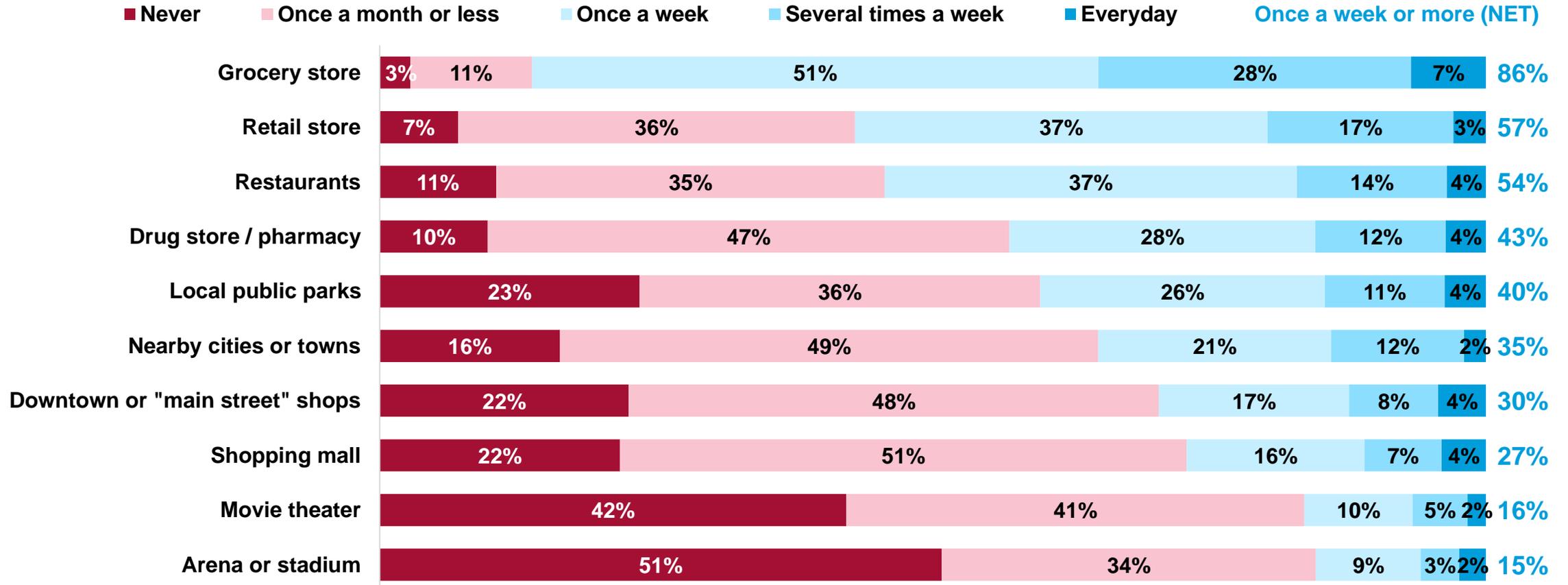
Q4. Thinking again ahead to the winter of 2022, which statement best aligns with your typical local travel patterns?

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Consumers Will Most Often Visit Grocery and Retail Stores, Restaurants, and Pharmacies in 2022

Thinking about 2022, how often do you anticipate you will visit each of the following?



BASE: GENERAL PUBLIC (N=1,000)

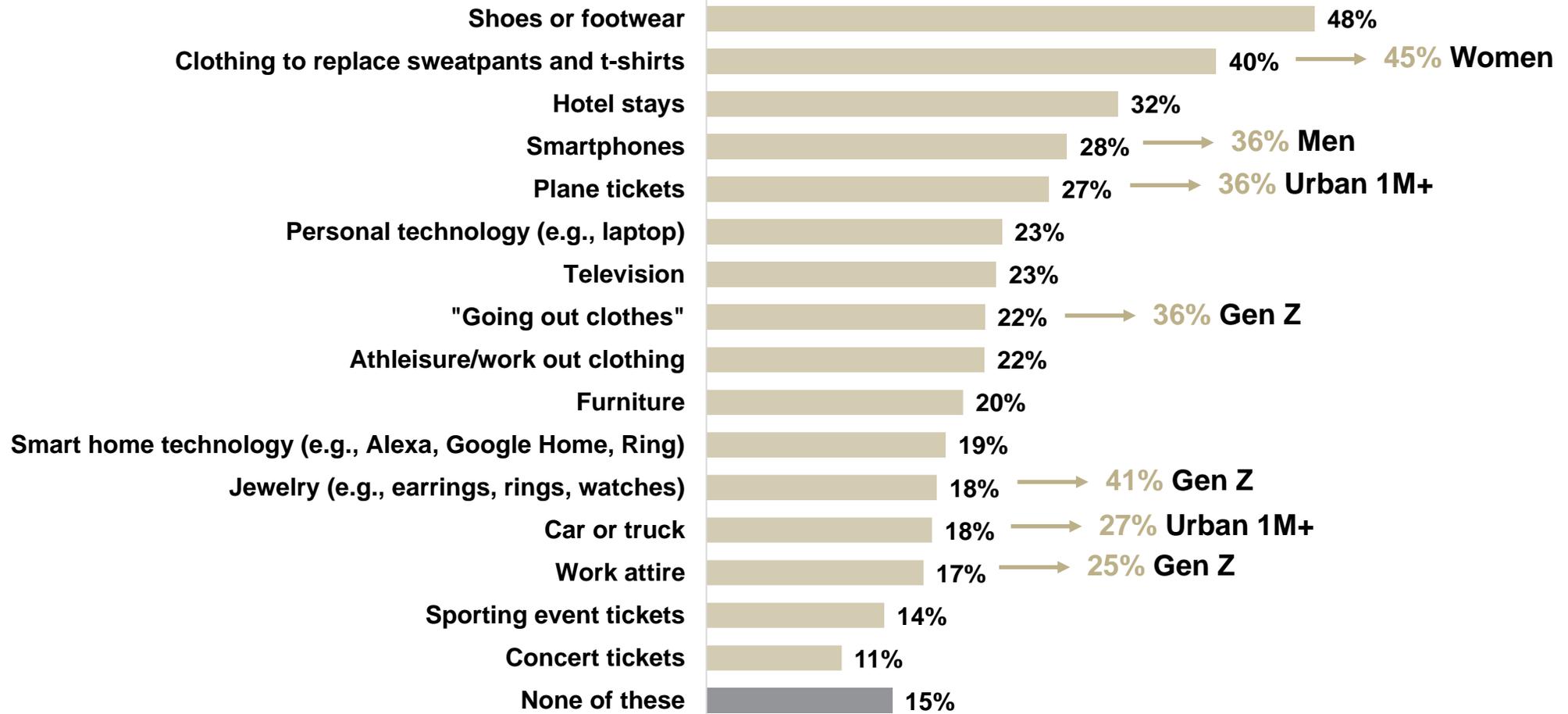
Q5. Thinking about 2022, how often do you anticipate you will visit each of the following?

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Footwear, Clothing and Travel Will Be Some of Most Purchased Items in 2022

Thinking ahead to 2022, which of the following items do you plan to purchase?
Please select all that apply.



BASE: GENERAL PUBLIC (N=1,000)

Q6. Thinking ahead to 2022, which of the following items do you plan to purchase? Please select all that apply.

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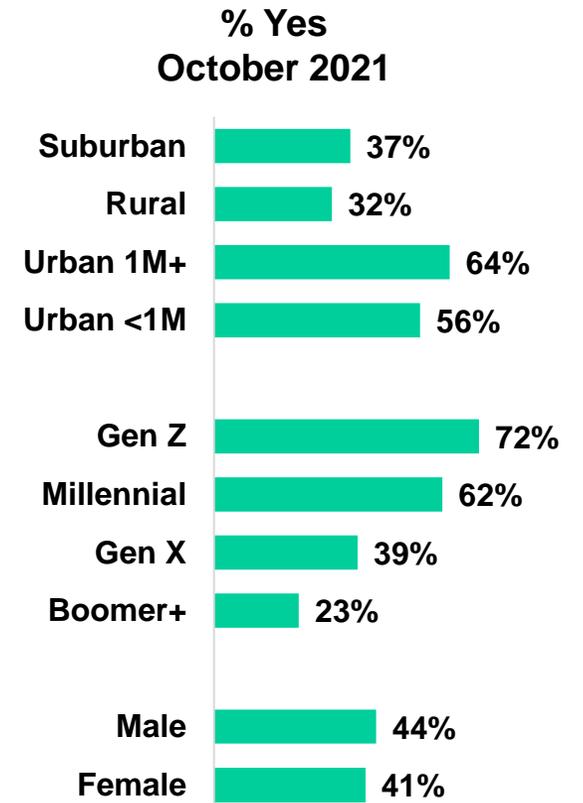
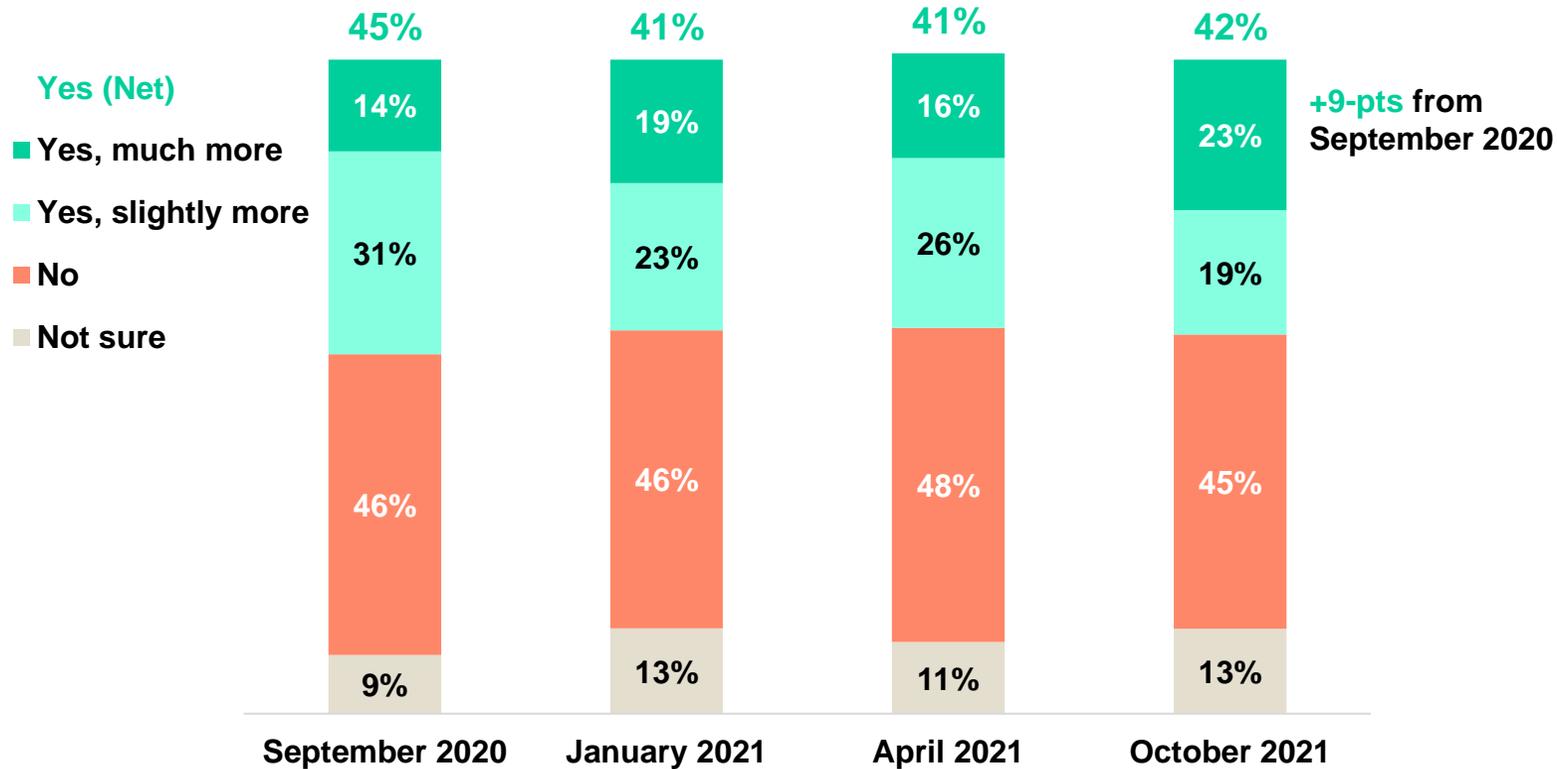


PART 3:
Out of Home Media Relevance



Those Noticing OOH Much More Is Up Significantly from September 2020

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



BASE: GENERAL PUBLIC (N=1,000)

Q8. Would you say you are noticing billboards, outdoor video screens, posters, signage and other outdoor ads more now than before the pandemic began?

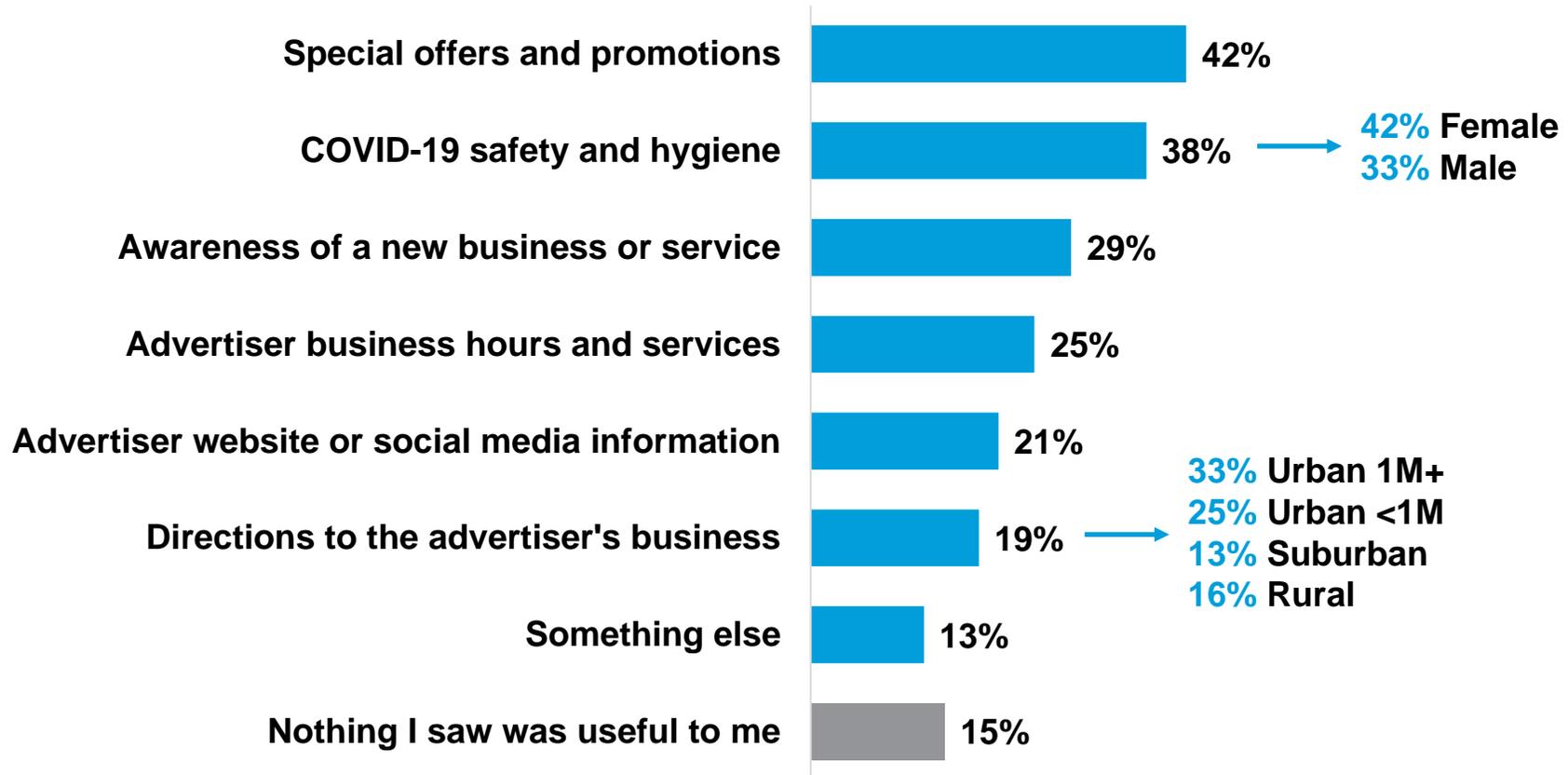
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85% of Those Who Have Noticed OOH Ads Find Them Useful

For those billboards, outdoor video screens, posters, 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.

Among those who have noticed outdoor ads recently



BASE: HAVE NOTICED OUTDOOR ADS RECENTLY (N=739)

Q17. For those billboards, outdoor video screens, posters, 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.

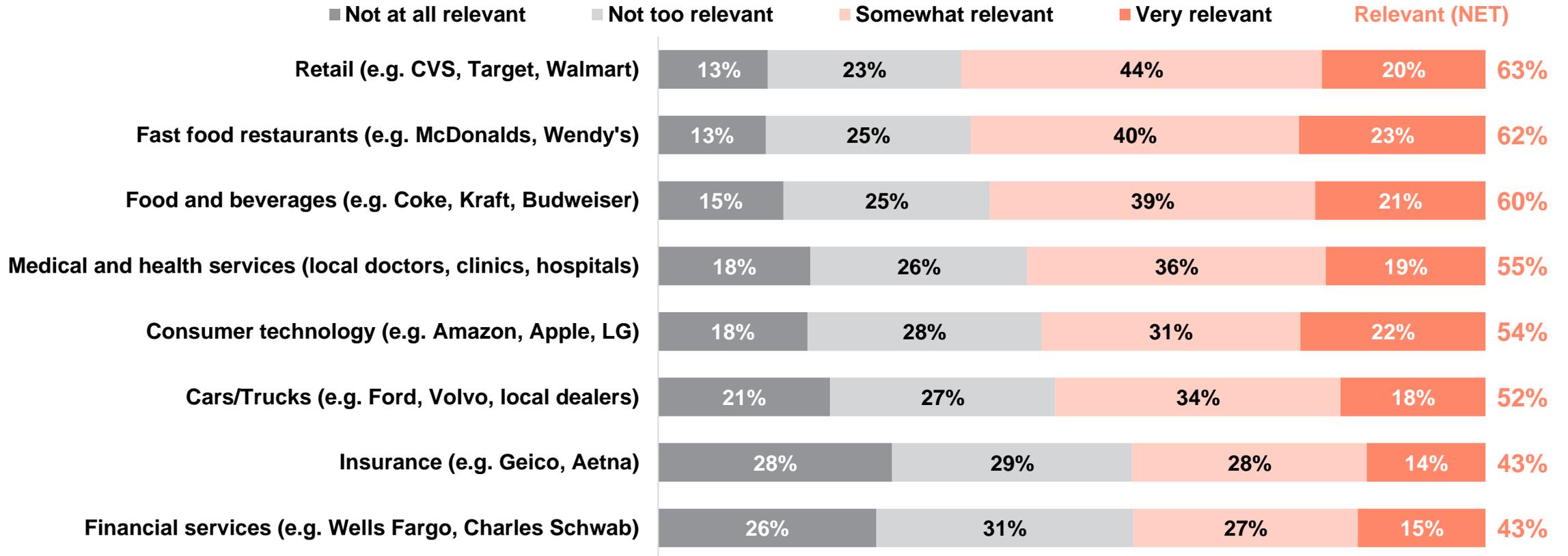
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Retail, Food & Beverage OOH Ads Are Most Relevant to Americans

Medical Services, Consumer Technology and Automotive Also Rank Highly

For each of the following types of products, how relevant to your interests do you find outdoor advertisements such as billboards, outdoor video screens, posters, signage, and other outdoor ads?



BASE: GENERAL PUBLIC (N=1,000)

Q16. For each of the following types of products, how relevant to your interests do you find outdoor advertisements such as billboards, outdoor video screens, posters, signage, and other outdoor ads?

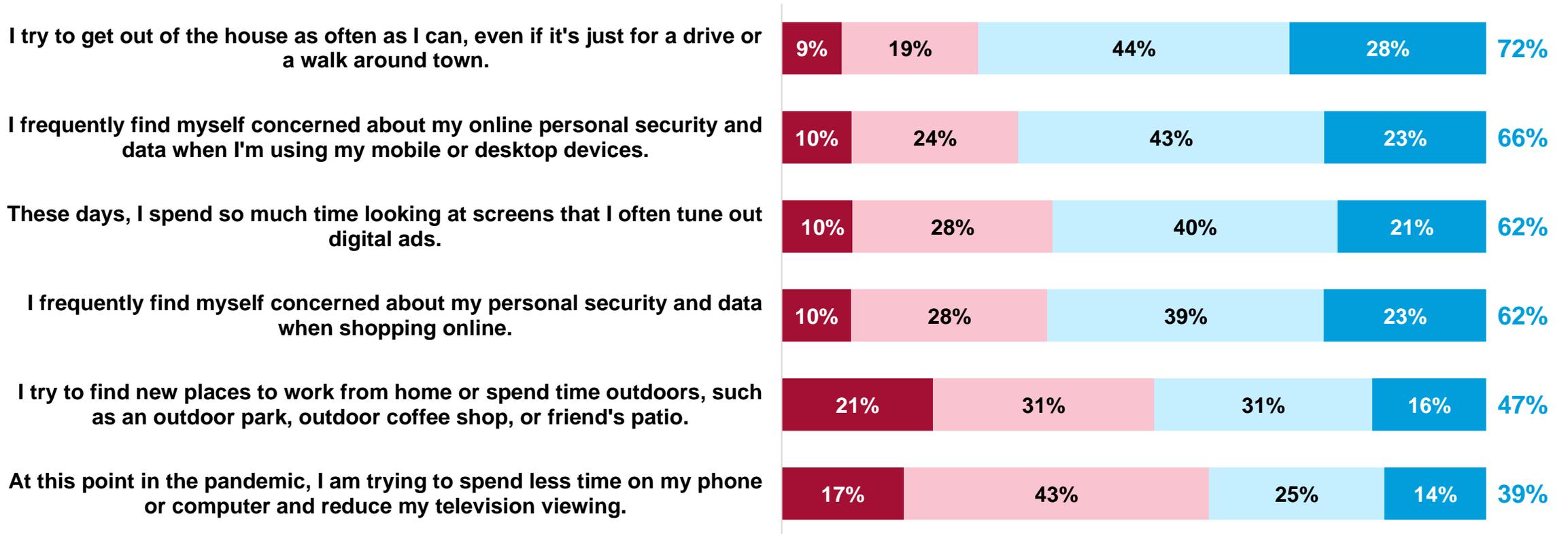
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Over 60% Frequently Skip Online Ads Due to Digital Device Burnout And Two-Thirds Are Concerned About Online Data Privacy

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

■ Strongly disagree
 ■ Somewhat disagree
 ■ Somewhat agree
 ■ Strongly agree
 Agree (NET)



BASE: GENERAL PUBLIC (N=1,000)

Q9. How much do you agree or disagree with each of the following statements?

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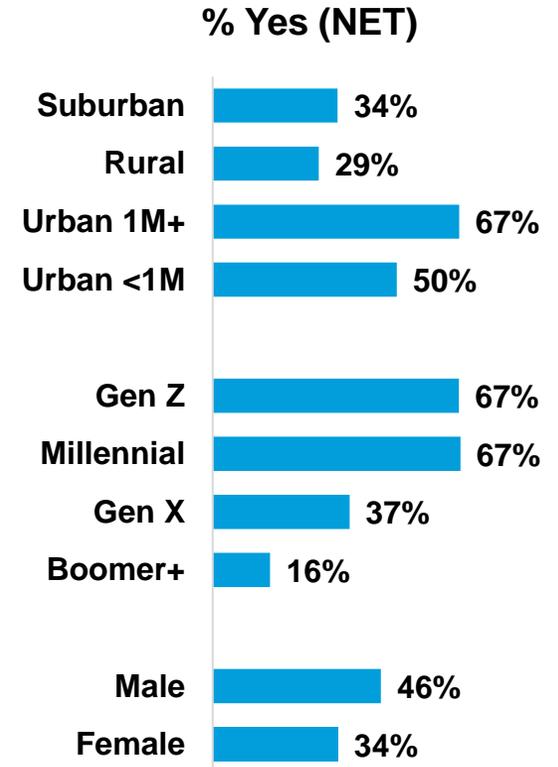
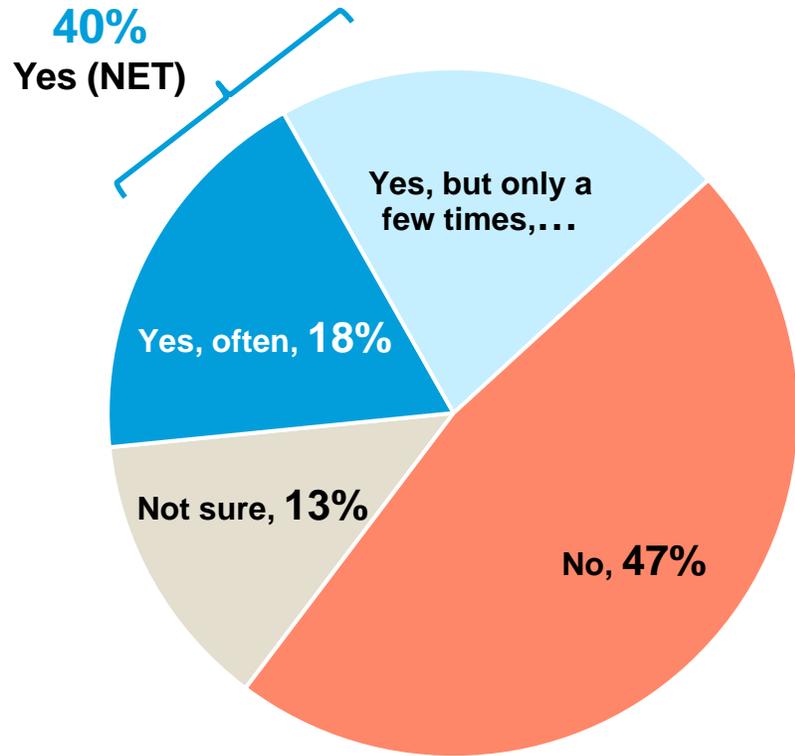


PART 4:
Engagement with Out of Home Media



Over Two-Thirds of Younger Generations Recall Seeing OOH on Social Media

Do you recall seeing an out of home advertisement (i.e., a billboard, outdoor video screens or posters, or other outdoor signage) reposted on a social media platform?



BASE: GENERAL PUBLIC (N=1,000)

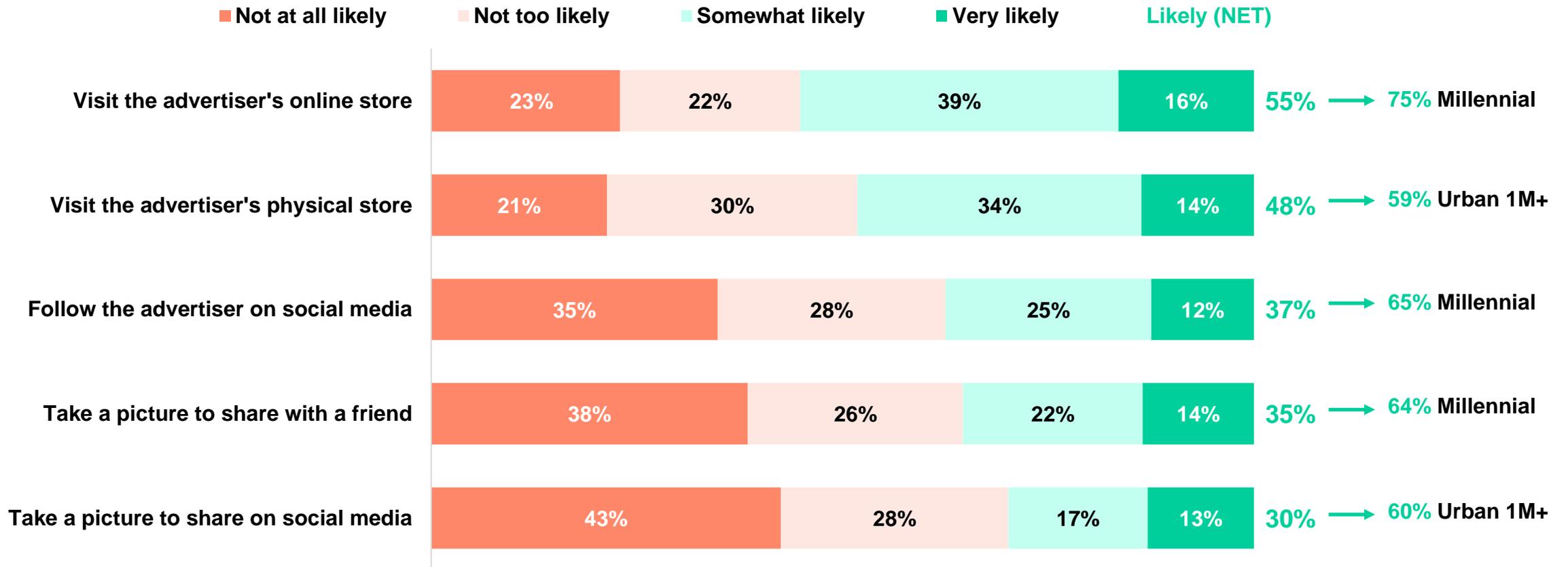
Q10. Do you recall seeing an out of home advertisement (i.e., a billboard, outdoor video screens or posters, or other outdoor signage) reposted on a social media platform?

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Seeing OOH Ads of Interest Most Likely to Boost Online or Retail Foot Traffic for Advertisers

After seeing an out of home advertisement such as billboards, outdoor video screens, posters, and other signage that you really liked or found to be interesting, how likely would you be to do the following?



BASE: GENERAL PUBLIC (N=1,000)

Q11. After seeing an out of home advertisement such as billboards, outdoor video screens, posters, and other signage that you really liked or found to be interesting, how likely would you be to do the following?

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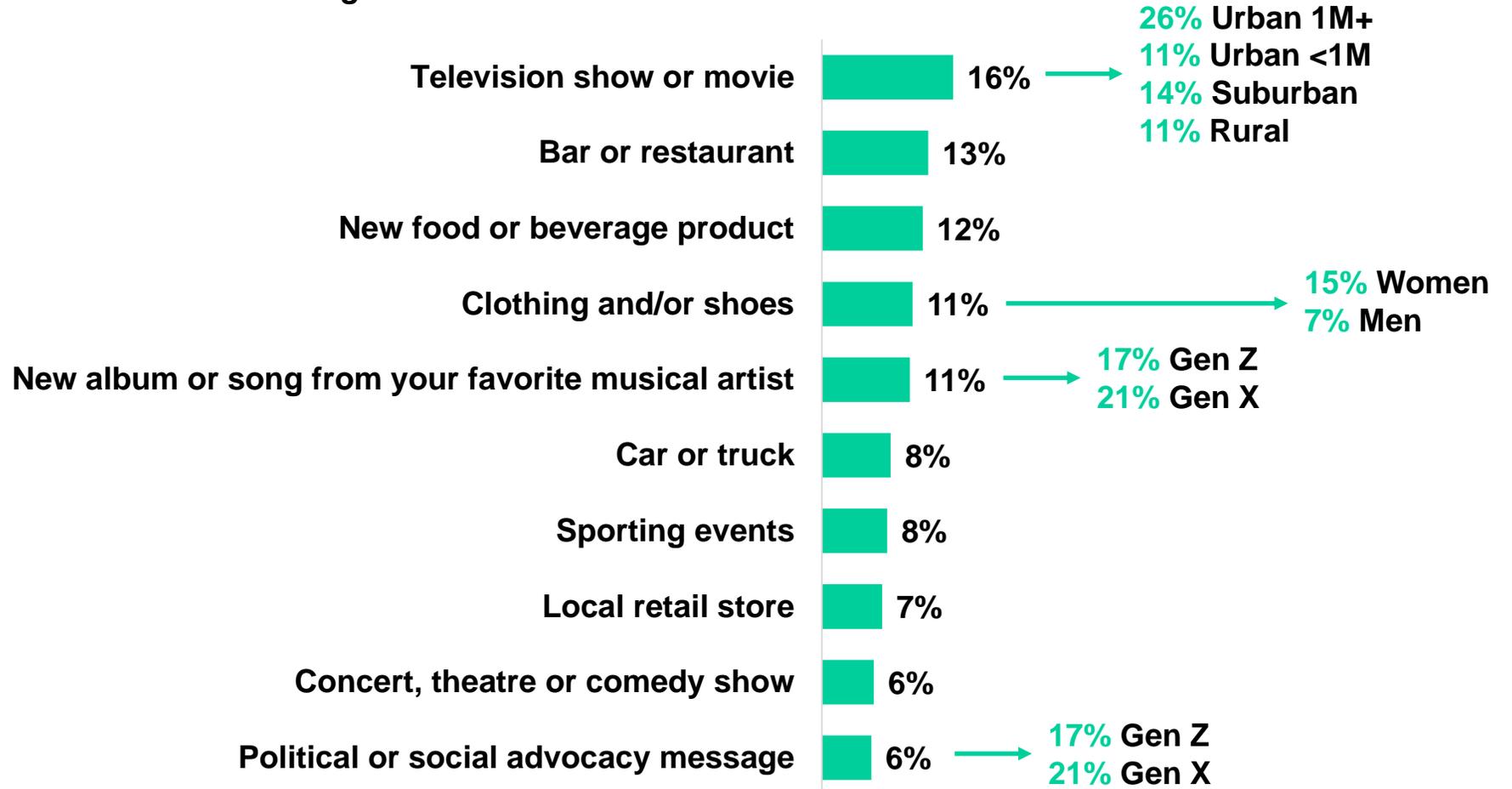
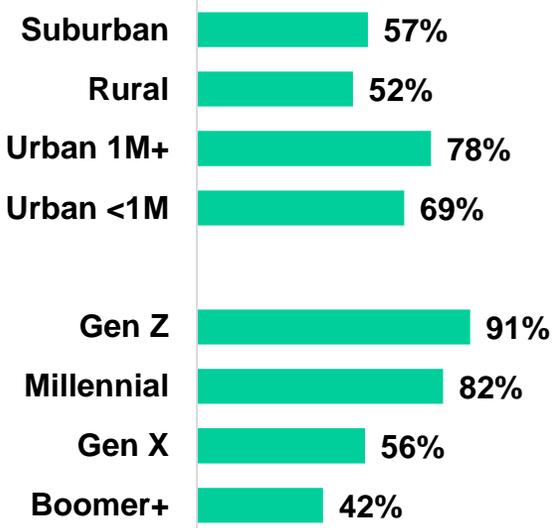


Over 60% Would Reshare OOH Ads on Social, Including Over 80% of Younger Generations

Which type of out of home advertisement are you most likely to reshare on your social media?

Among those who would reshare

61% would reshare OOH on social media



BASE: WOULD REPOST OOH ON SOCIAL MEDIA (N=588)

Q12. Which type of out of home advertisement are you most likely to reshare on your social media?

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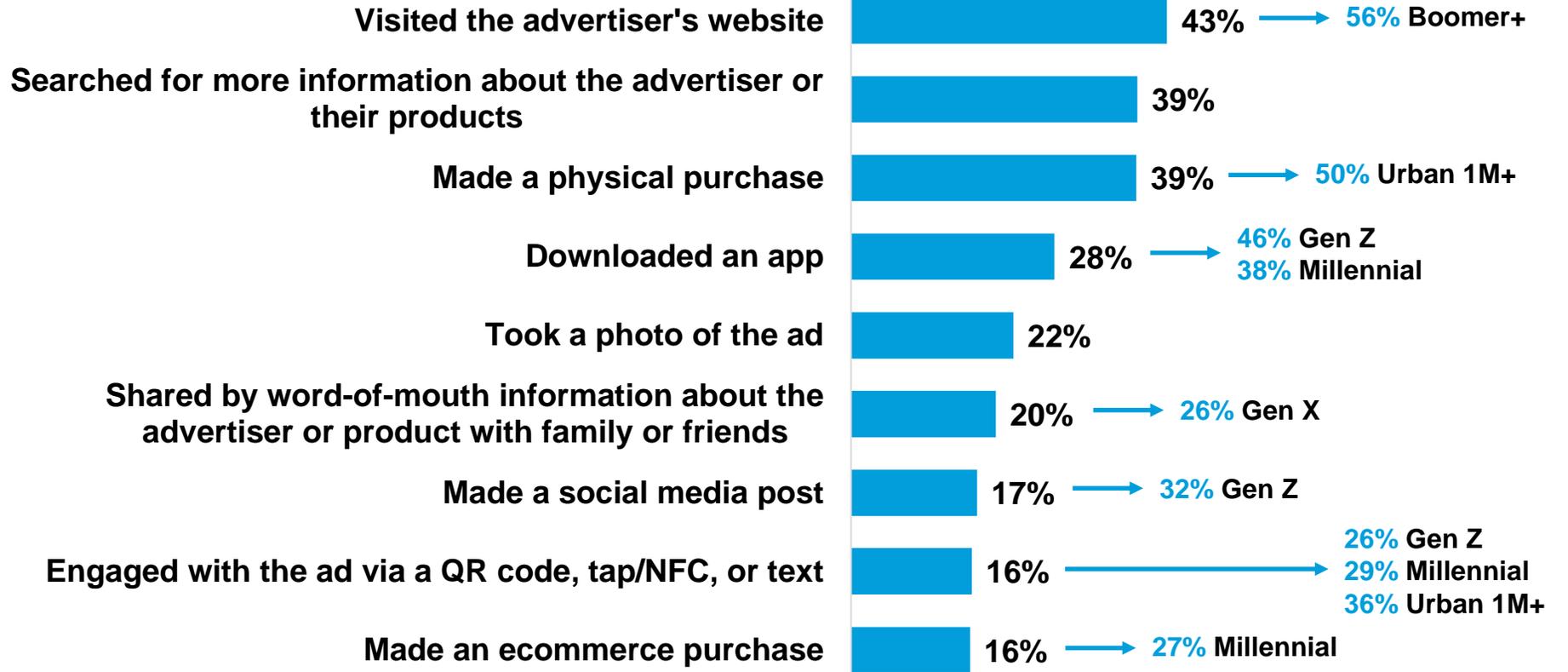
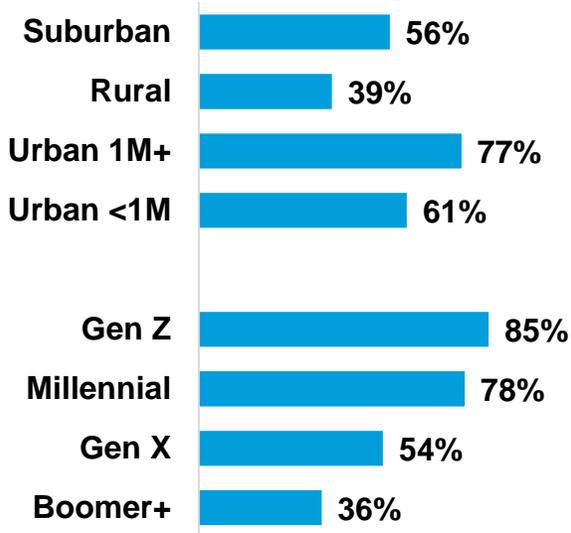
Three-Fifths Have Engaged with OOH Ads

Engagement Most Likely Has Led to Visiting Advertiser's Website, Searching for Info, or Making a Purchase

For those billboards, outdoor video screens, posters, 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.

Among those who have engaged

57% have engaged with an OOH ad



BASE: HAVE ENGAGED WITH OOH (N=534)

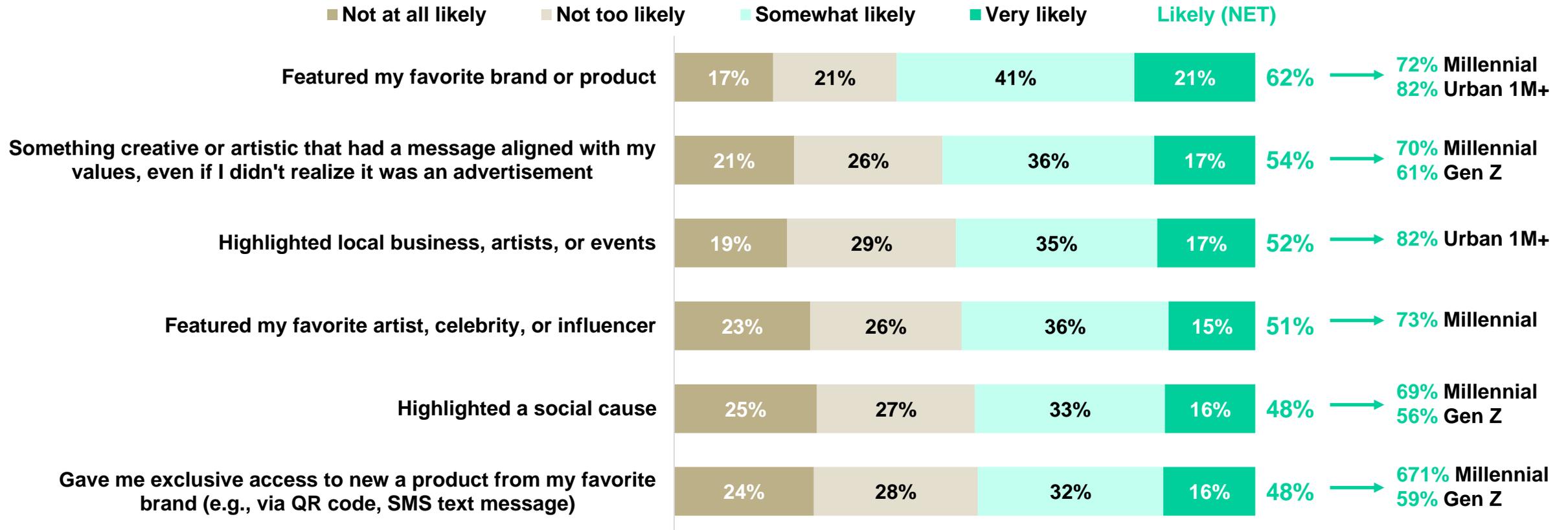
Q13. For those billboards, outdoor video screens, posters, signage, and other outdoor ads that you've noticed recently, have the ads led you to do any of the following? Please select all that apply.

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OOH Engagement Is Driven by Brand Loyalty, Creativity, Locality, Influencers

How likely would you be to stop and read or engage with the following kinds of outdoor advertising if the billboards, outdoor video screens, posters, and other signage was to show each of the following?



BASE: GENERAL PUBLIC (N=1,000)

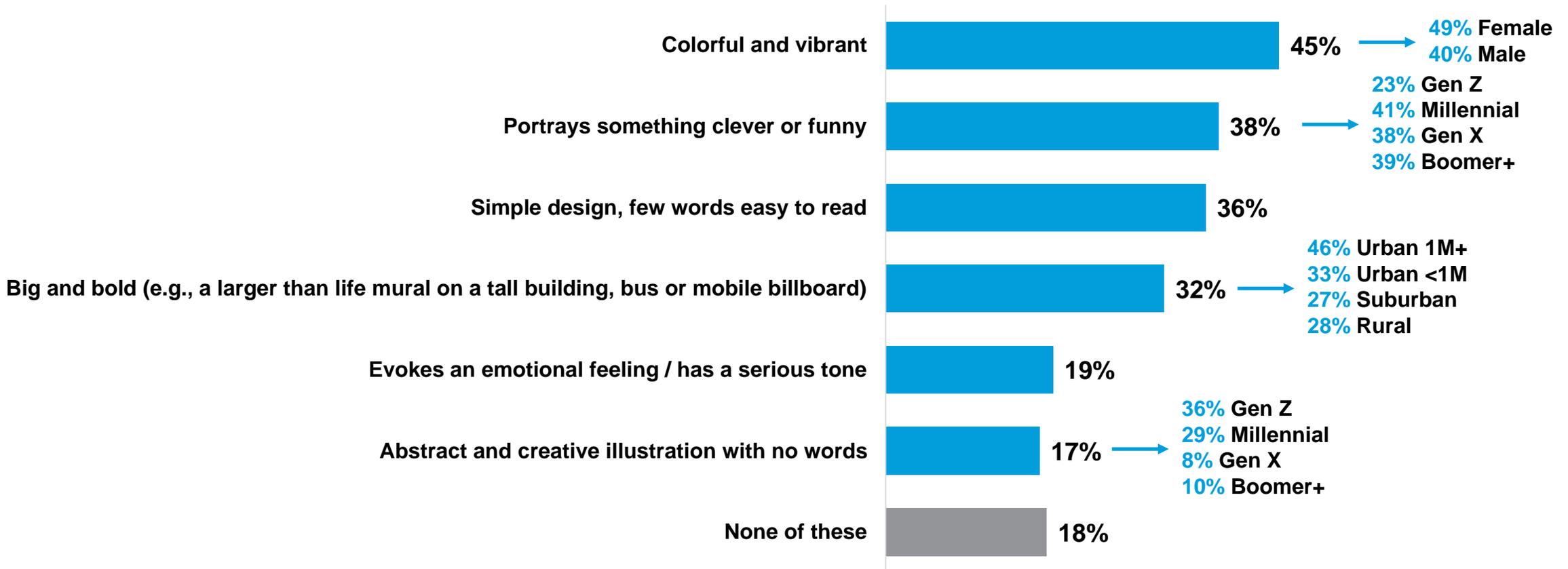
Q14. How likely would you be to stop and read or engage with the following kinds of outdoor advertising if the billboards, outdoor video screens, posters, and other signage was to show each of the following?

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Colorful, Clever, and Coherent Ads Most Likely to Engage Consumers

Which of the following creative aspects of billboards, outdoor video screens, posters, and other signage would you say are most likely to get your attention and engage with? Please select up to 3.



BASE: GENERAL PUBLIC (N=1,000)

Q15. Which of the following creative aspects of billboards, outdoor video screens, posters, and other signage would you say are most likely to get your attention and engage with? Please select up to 3.

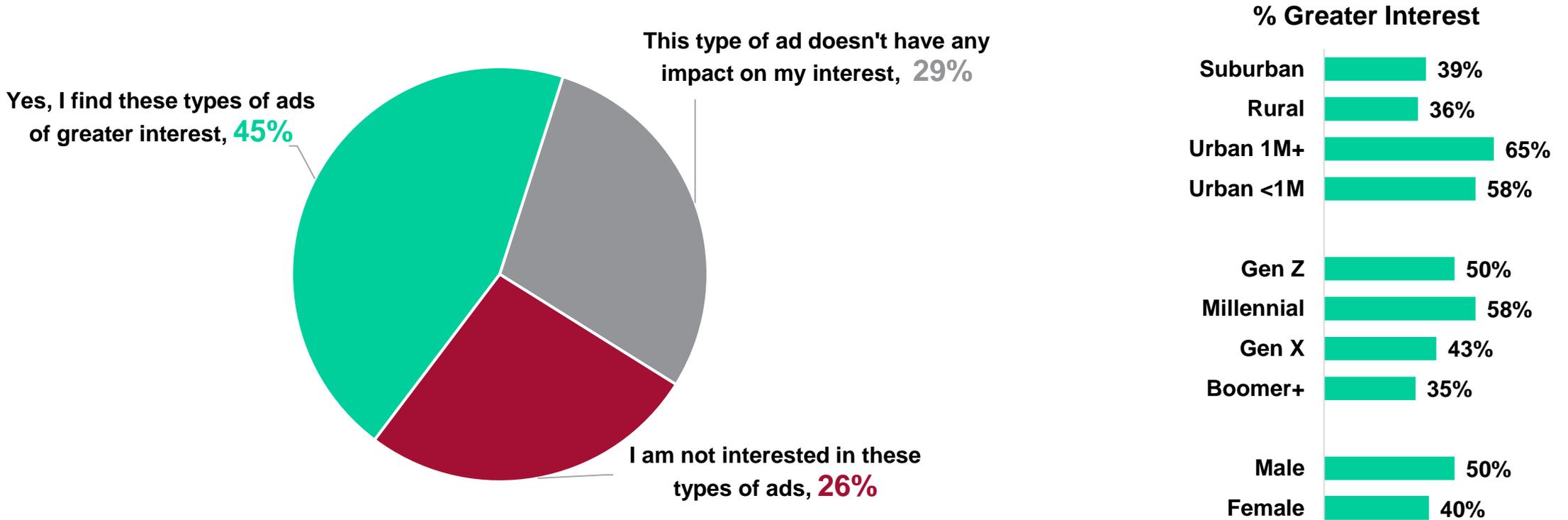
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Nearly Half Say Contextual OOH Ads Are More Interesting

Some billboards, outdoor video screens, posters, 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: GENERAL PUBLIC (N=1,000)

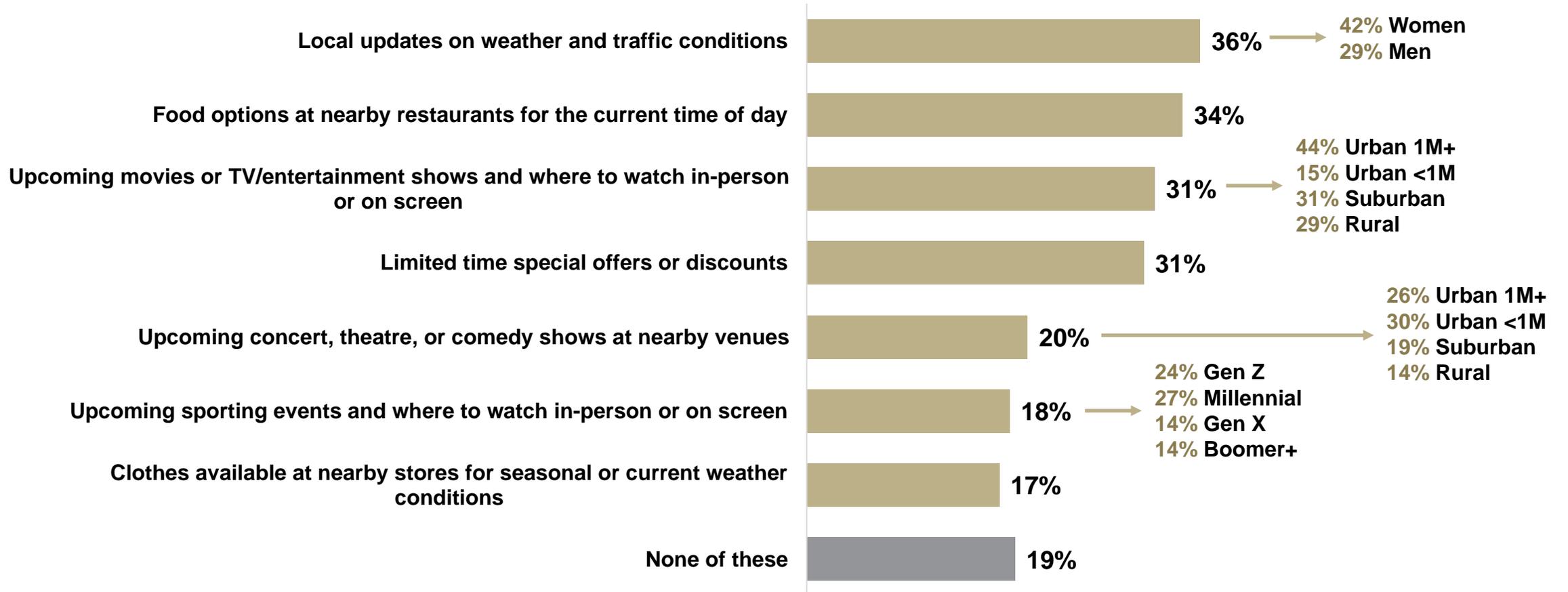
Q18. Some billboards, outdoor video screens, posters, signage, and other outdoor ads are personalized to include timely information e.g., breakfast offerings in the morning, products relevant to current weather, etc. Do you find this type of advertising more or less interesting than a typical ad?

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Weather/Traffic, Food, Entertainment and Special Offers Considered as Most Helpful OOH Ads

Which of the following types of these changing, customized outdoor advertisements would you find to be most helpful?



BASE: GENERAL PUBLIC (N=1,000)

Q19. Which of the following types of these changing, customized outdoor advertisements would you find to be most helpful?

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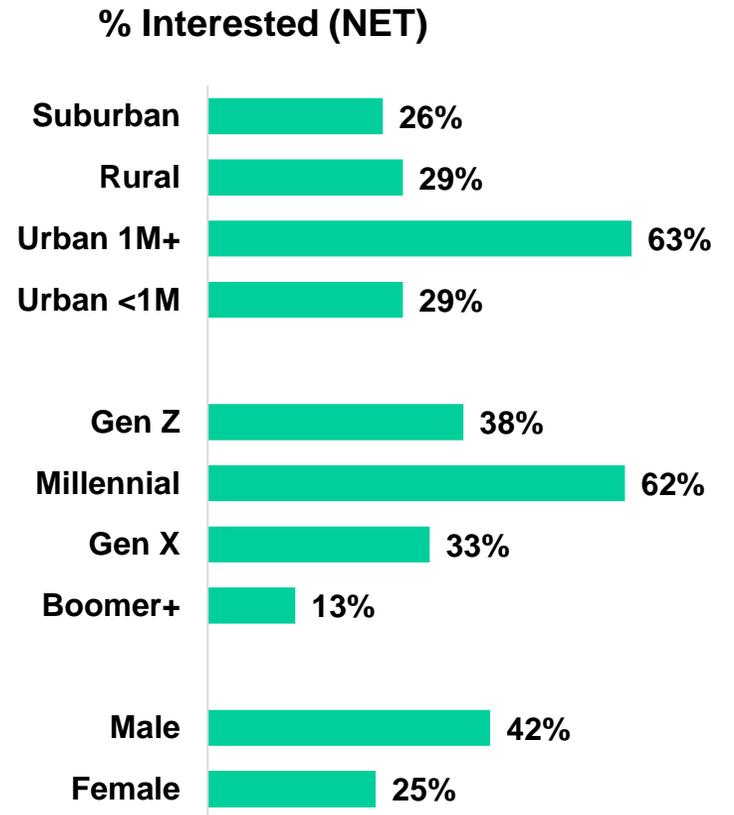
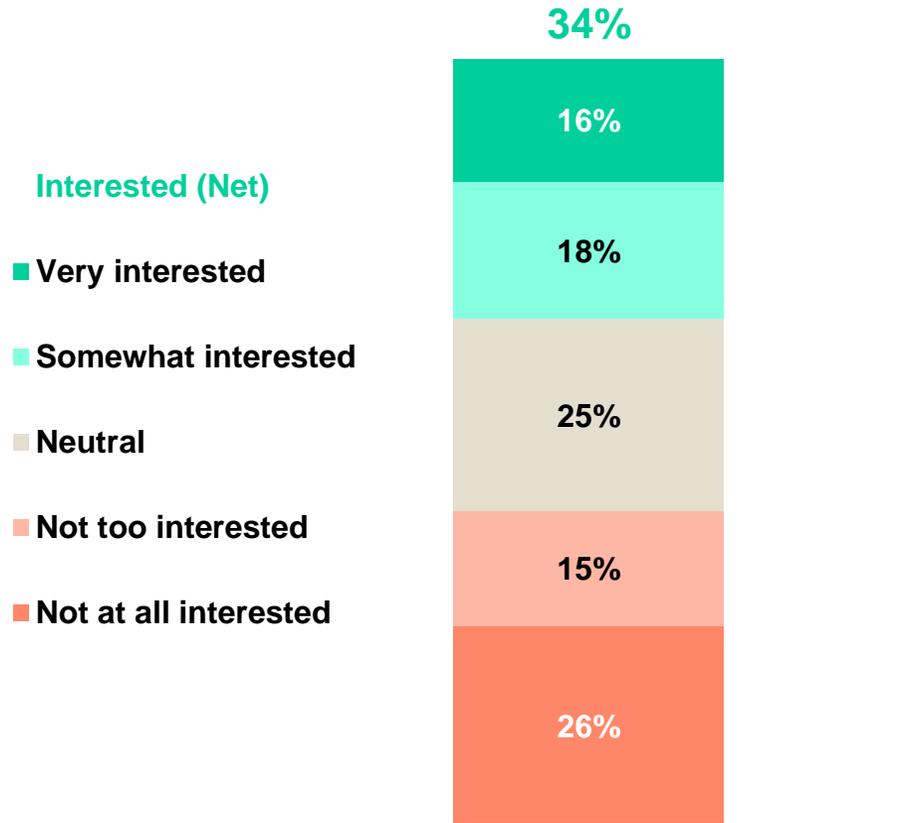


PART 5:
The Connected Consumer
and Data Privacy



Millennials and Urbanites Are Most Interested in Augmented and Virtual Reality

How interested are you in virtual reality (VR) and/or augmented reality (AR)?



BASE: GENERAL PUBLIC (N=1,000)

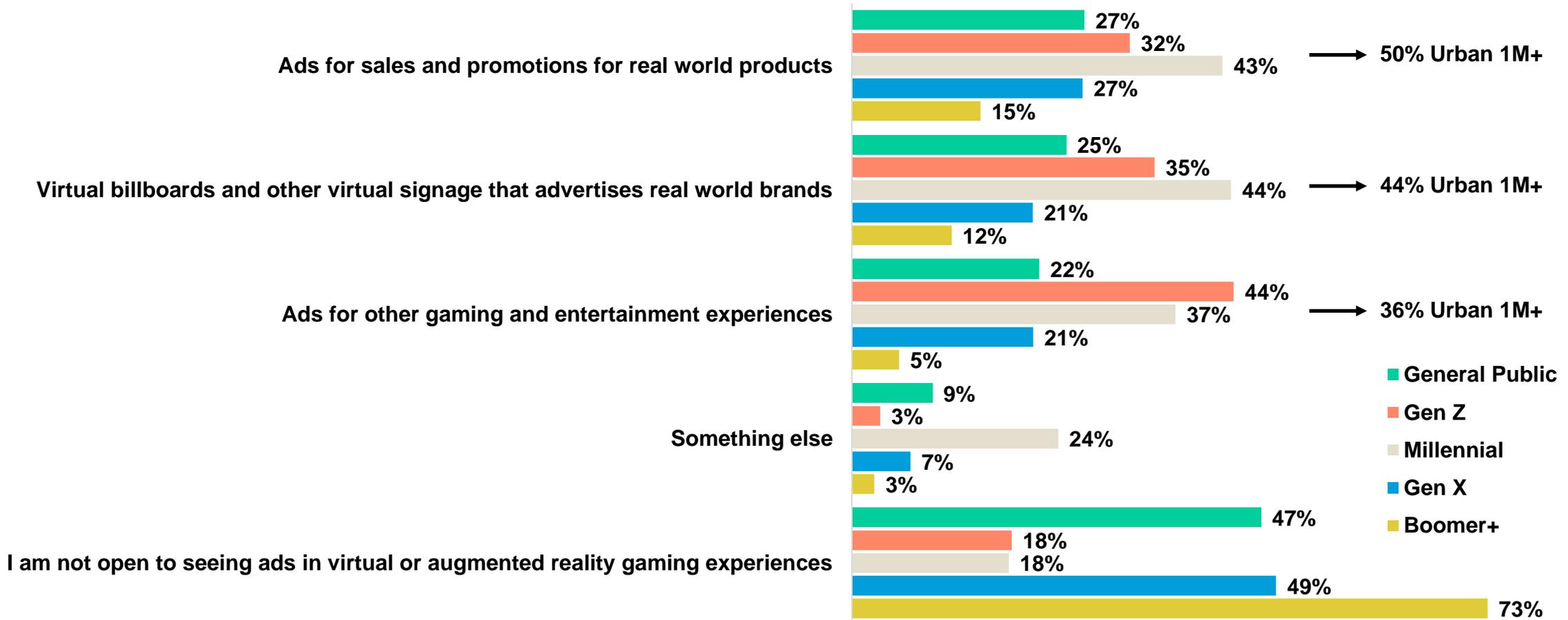
Q20. How interested are you in virtual reality (VR) and/or augmented reality?

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Younger Generations Are Open to Seeing Ads in VR/AR Experiences

Would you be open to seeing the following during virtual reality (VR) and/or augmented reality (AR) gaming experiences?



BASE: GENERAL PUBLIC (N=1,000)

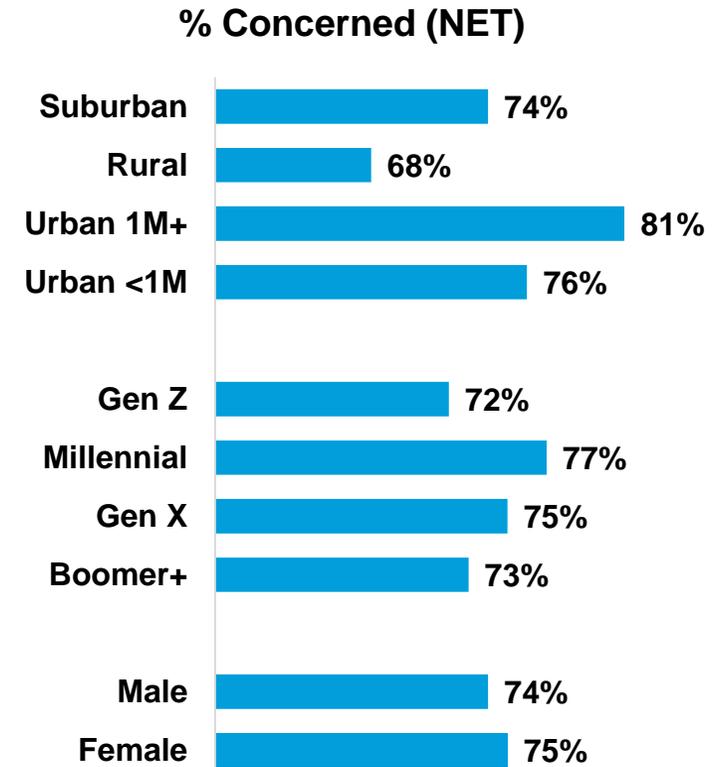
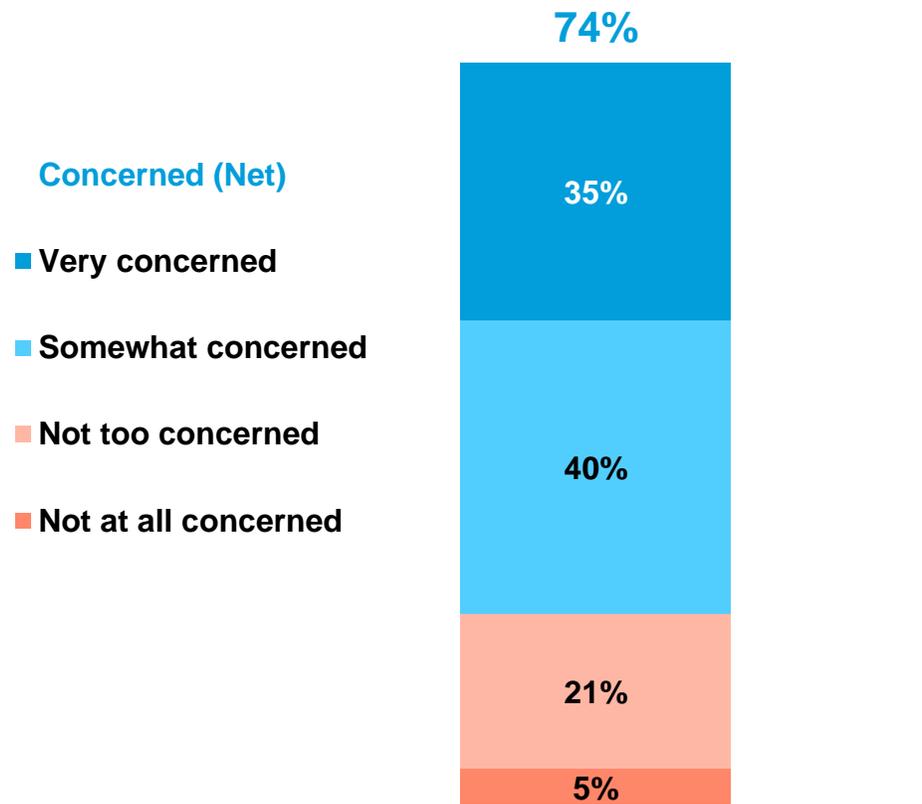
Q21. Would you be open to seeing the following during virtual reality (VR) and/or augmented reality gaming experiences?

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Concern Over Privacy and Use of Personal Info Online Is High

Generally speaking, how concerned would you say you are about privacy and the use of your personal information and online behavior to target you with online ads?



BASE: GENERAL PUBLIC (N=1,000)

Q22. Generally speaking, how concerned would you say you are about privacy and the use of your personal information and online behavior to target you with online ads?

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Implications & Recommendations



The outlook for consumer travel is strong, increasing OOH's relevance over the next year as the COVID pandemic will (hopefully) continue to recede and normal travel continue to return. Over half (51%) of those traveling in the first half of 2022 will do so by airplane, more than double that from last winter.



Social media is an effective amplifier of OOH campaigns, especially for younger generations: two-thirds (67%) of Gen Z and Millennials recall OOH ads reposted on social media. And that most consumers (57%) have engaged with an OOH reinforces that when OOH ads are of interest, relevant, and targeted, consumers are very open to engaging and sharing.



VR/AR creates a new opportunity for OOH - among younger consumers. A large majority (82%) of both Gen Z and Millennials are open to seeing some type of ad in VR/AR. Among adults in cities with populations of one million or more, 72% say they are interested in seeing ads in VR/AR.



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