



The Harris Poll

Harris Insights & Analytics LLC, A Stagwell Company

Consumer Trends & OOH Q4 2020







Out of Home Advertising Association of America

October 15, 2020



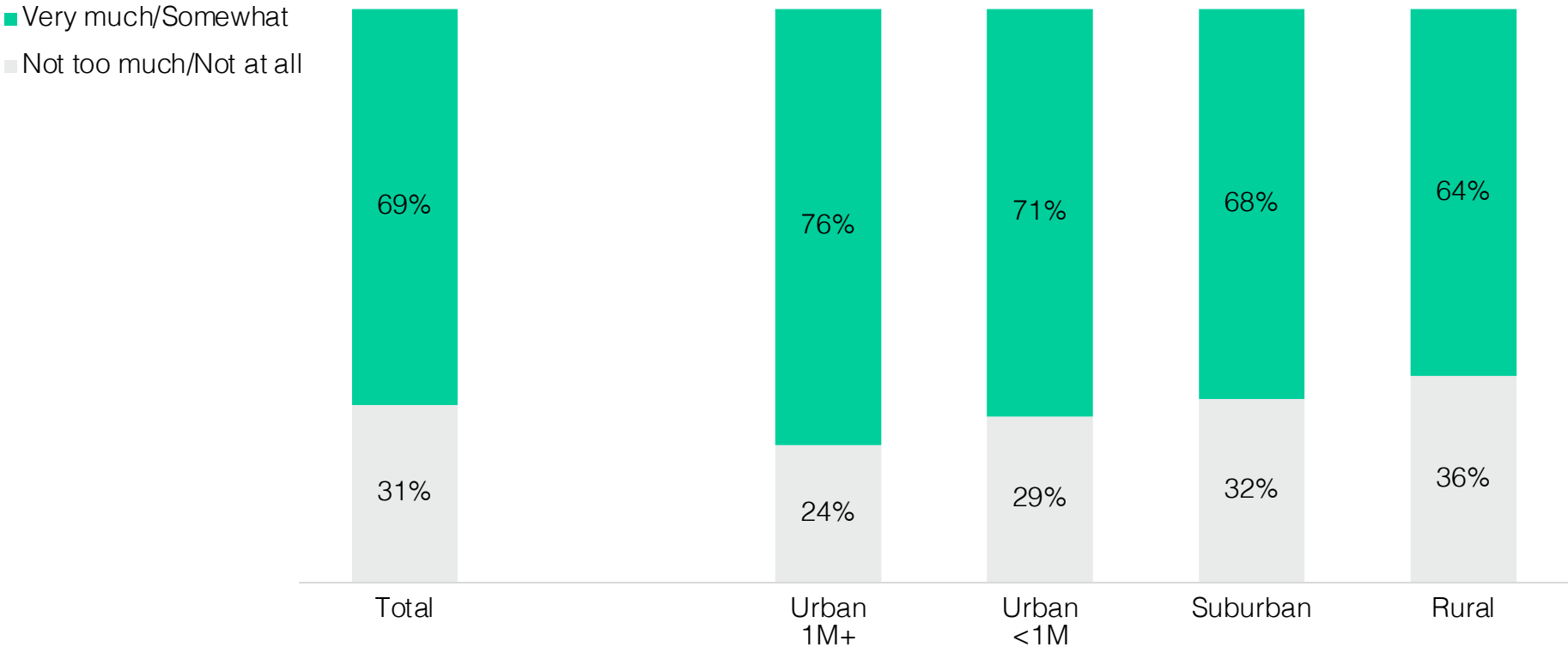
Methodology

	Dates	September 21 – 23, 2020
	Survey Length	15 minutes
	Method	Online
	Audience	2,058 U.S. Adults 18+



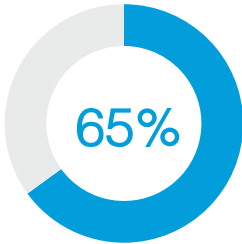
COVID Lockdowns Have Given Consumers a Renewed Appreciation for the Outdoors

Now that COVID-19 stay-home orders and lockdown restrictions are mostly lifted, how much has your **appreciation of the experience/awareness of your surroundings increased when you are outside** (e.g., street signs, murals, local store fronts, nature)?

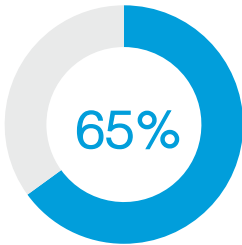




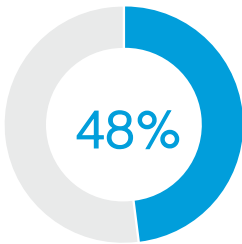
In Fact, Americans Are Turning to the Outdoors to Stay Safe (and Sane)



Try to get out of the house as often as they can, even if it's just for a drive or a walk around town

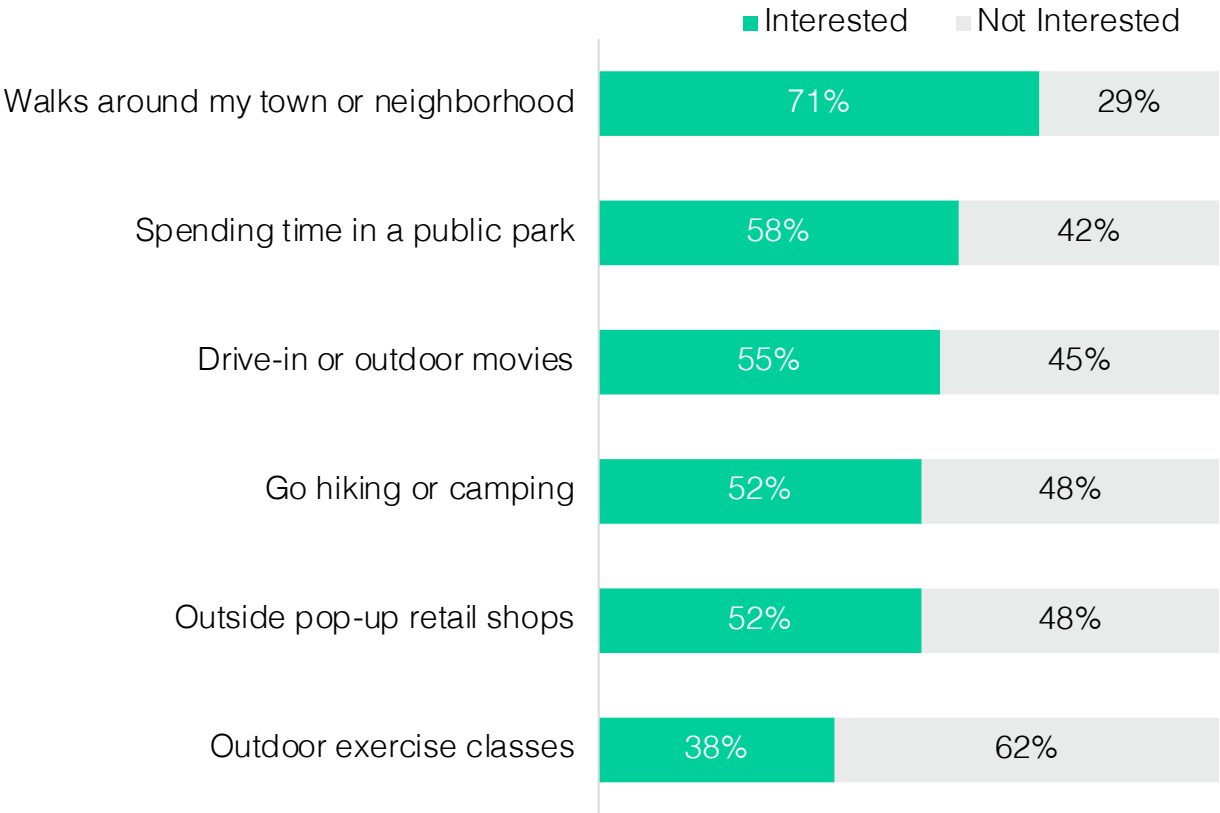


Have been trying to find safe outdoor activities to spend their time



Try to find new places to work from home or spend time outdoors, such as outdoor parks, outdoor coffee shops, or a friend's patio

With social distancing restrictions due to the COVID-19 pandemic put into place, **how interested are you** in each of the following types of alternate activities?

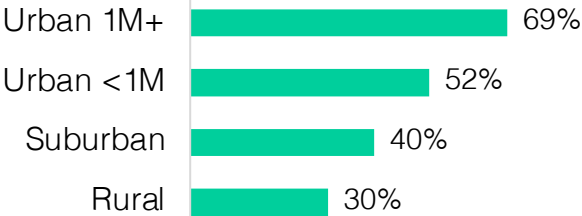
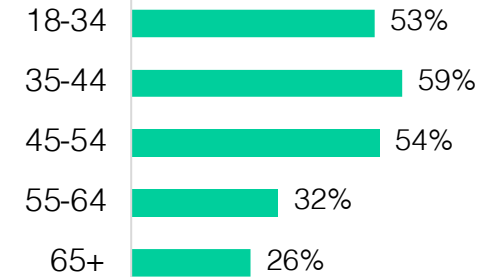
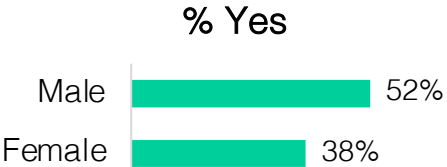
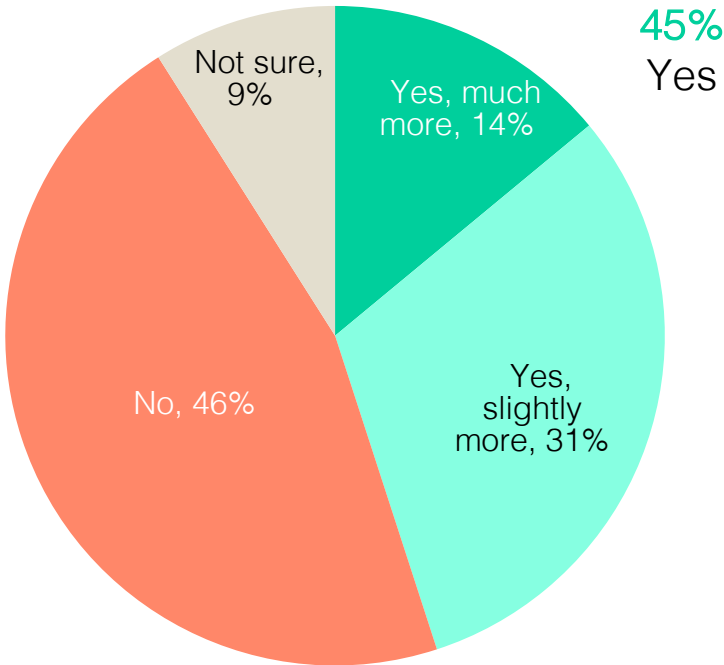


Base: All Qualified Respondents (2058)
Q1. Given the ongoing COVID-19 pandemic, would you say you are using the following types of transportation more or less to get around than you did before the pandemic?
Q12. How much do you agree or disagree with each of the following statements?
Q16. With social distancing restrictions due to the COVID-19 pandemic put into place, how interested are you in each of the following types of alternate activities?



Which Bodes Well for Out Of Home Advertising: Consumers Are Noticing OOH More Since COVID

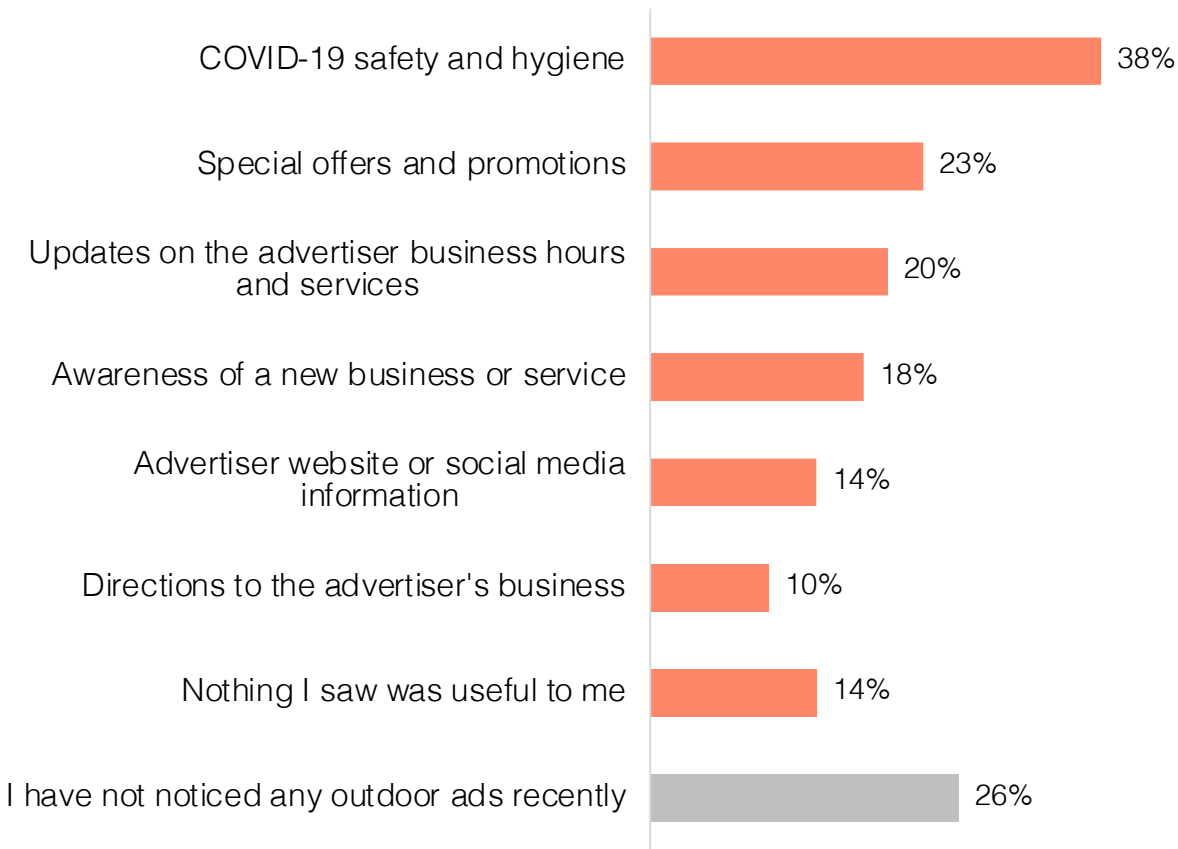
Would you say you are noticing billboards, outdoor video screens, posters, signage and other OOH ads more now than before the pandemic began?



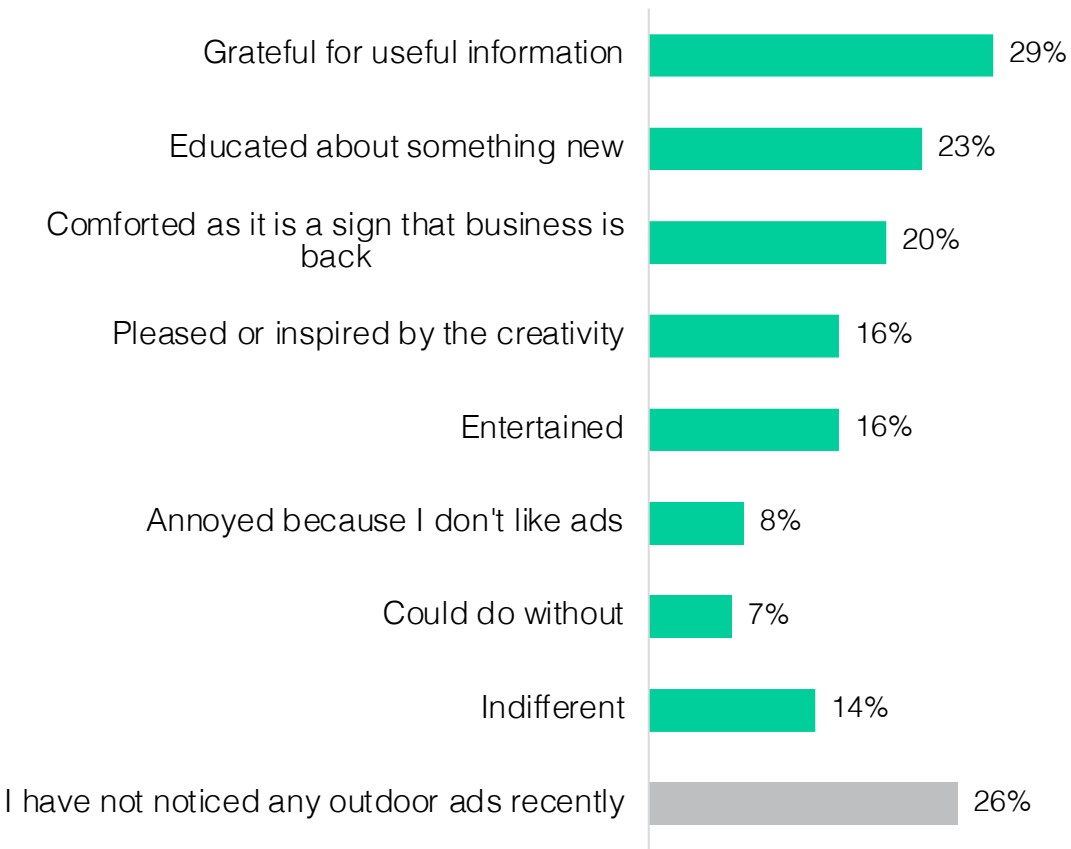


Out of Home Advertising Is Empowering Consumers, Equipping Them With COVID-19 Safety Information

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



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

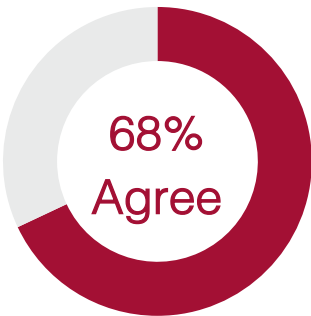


Base: All Qualified Respondents (2058)
Q7C. For those billboard, outdoor video screen, poster, signage and other outdoor ads that you've noticed recently, what if any kinds did you see that were useful to you? Please select all that apply.
Q7D. For the billboard, outdoor video screen, poster, signage and other outdoor ads you've noticed recently, which of the following best describe your reaction? Please select all that apply.

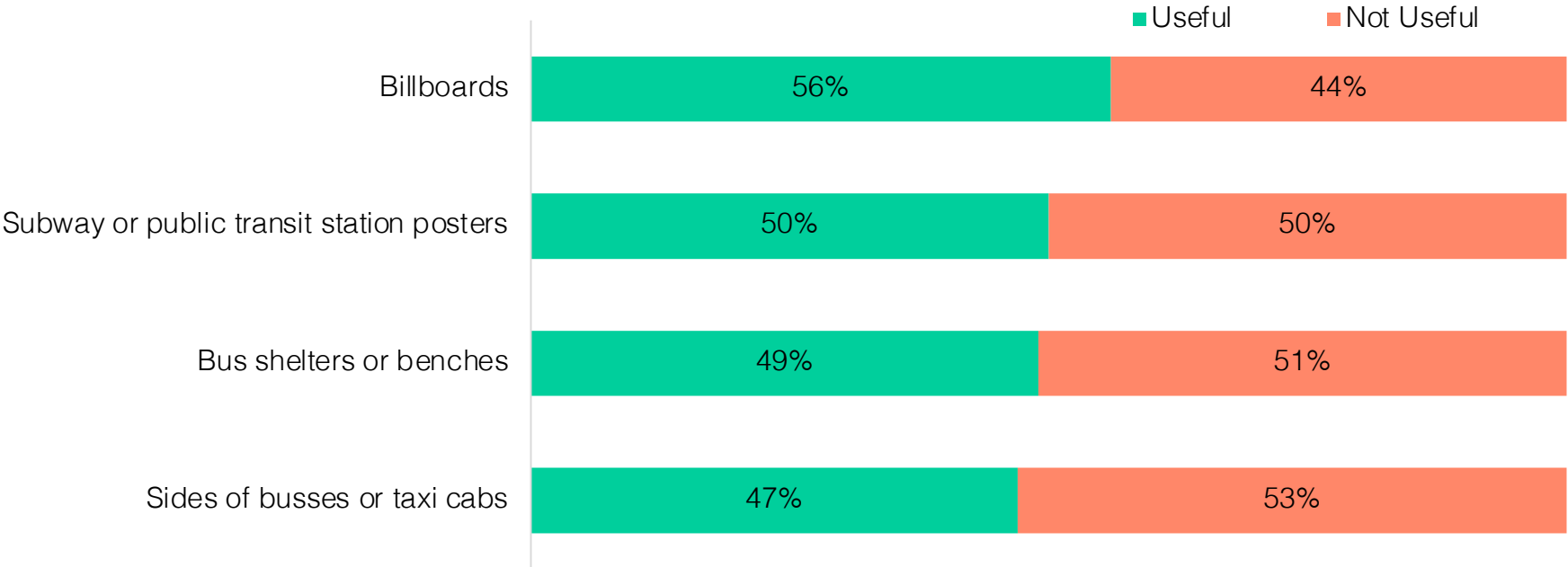


Consumers Are Tuning Out Digital Online Ads and Half Say OOH Advertising Is Useful

Generally speaking, how useful do you find advertisements on the following outlets when thinking about products to buy for yourself or others (e.g., gifts)?

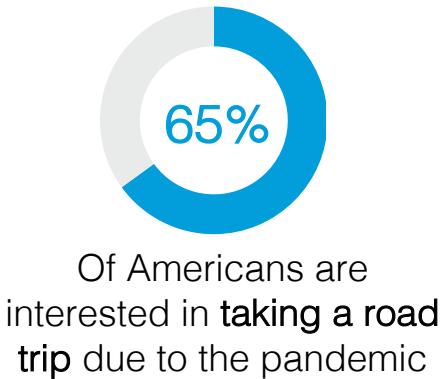


These days, I spend so much time looking at screens that I often tune out digital online ads.

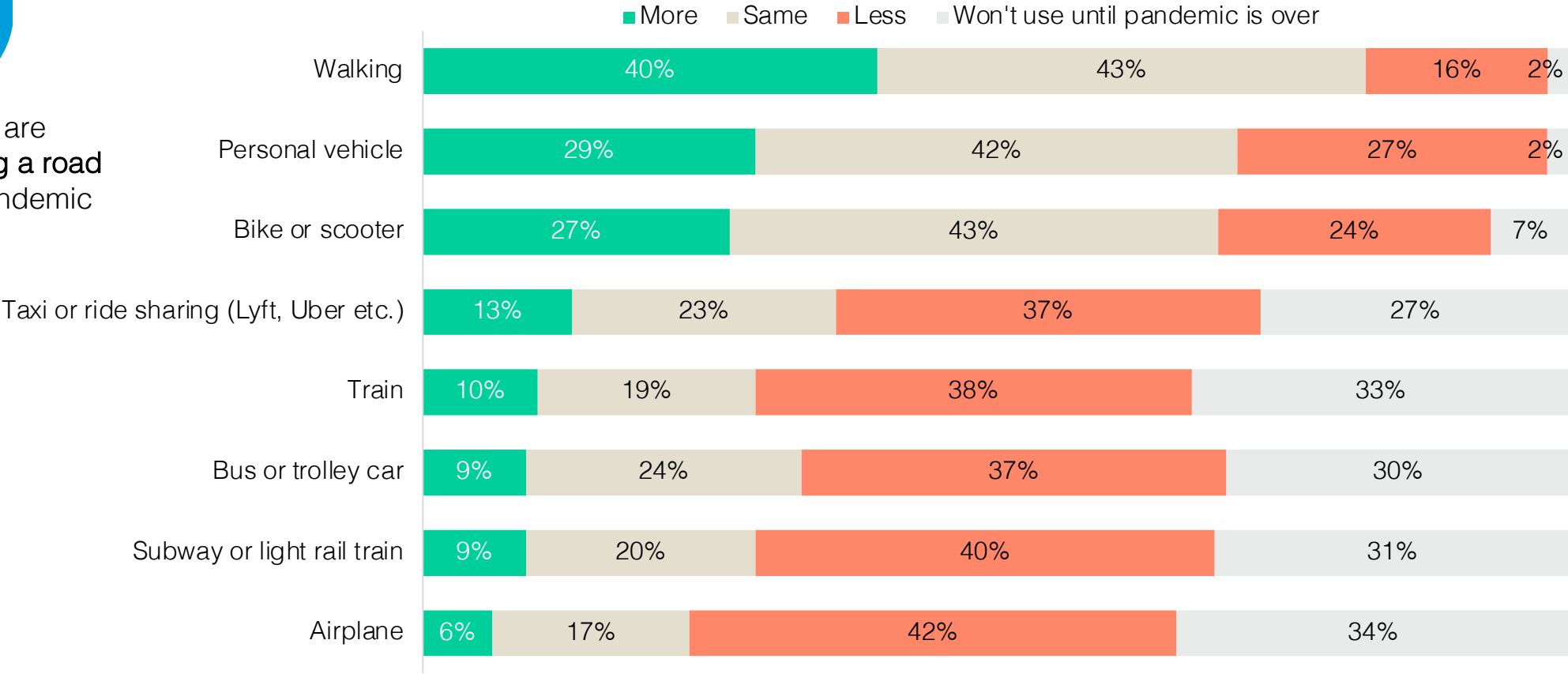




Right Now Consumers Are Focused on Solo Transportation



Given the ongoing COVID-19 pandemic, would you say you are using the following types of transportation **more or less** to get around than you did before the pandemic?

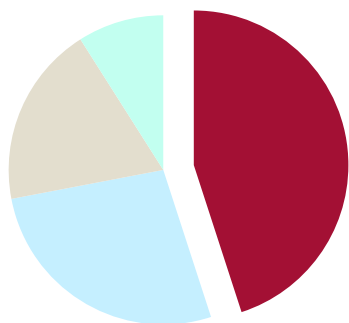


Base: Applicable Responses
Q1. Given the ongoing COVID-19 pandemic, would you say you are using the following types of transportation more or less to get around than you did before the pandemic?
Q16. With social distancing restrictions due to the COVID-19 pandemic put into place, how interested are you in each of the following types of alternate activities?



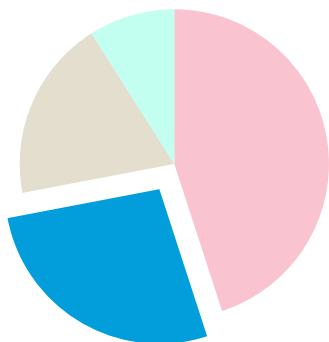
Despite a Shift Towards Hyperlocal Travel Amount, a Majority Will See Similar or Increasing Travel Amount

Thinking ahead to the next few months, which statement **best aligns** with your typical local travel patterns?



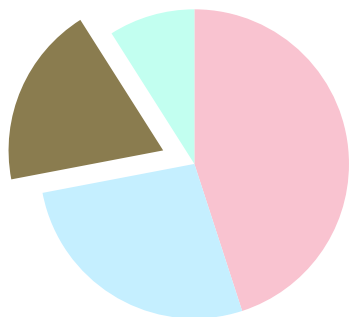
45%

My travel patterns will be **decreasing** in number of trips and distance in comparison to pre-COVID



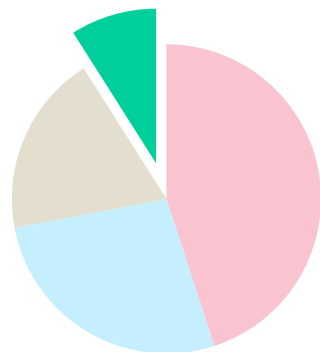
27%

My travel patterns will be **similar** to what they were pre-COVID



19%

My travel patterns will be **similar to what they were pre-COVID but more focused** on trips and locations closer to my home



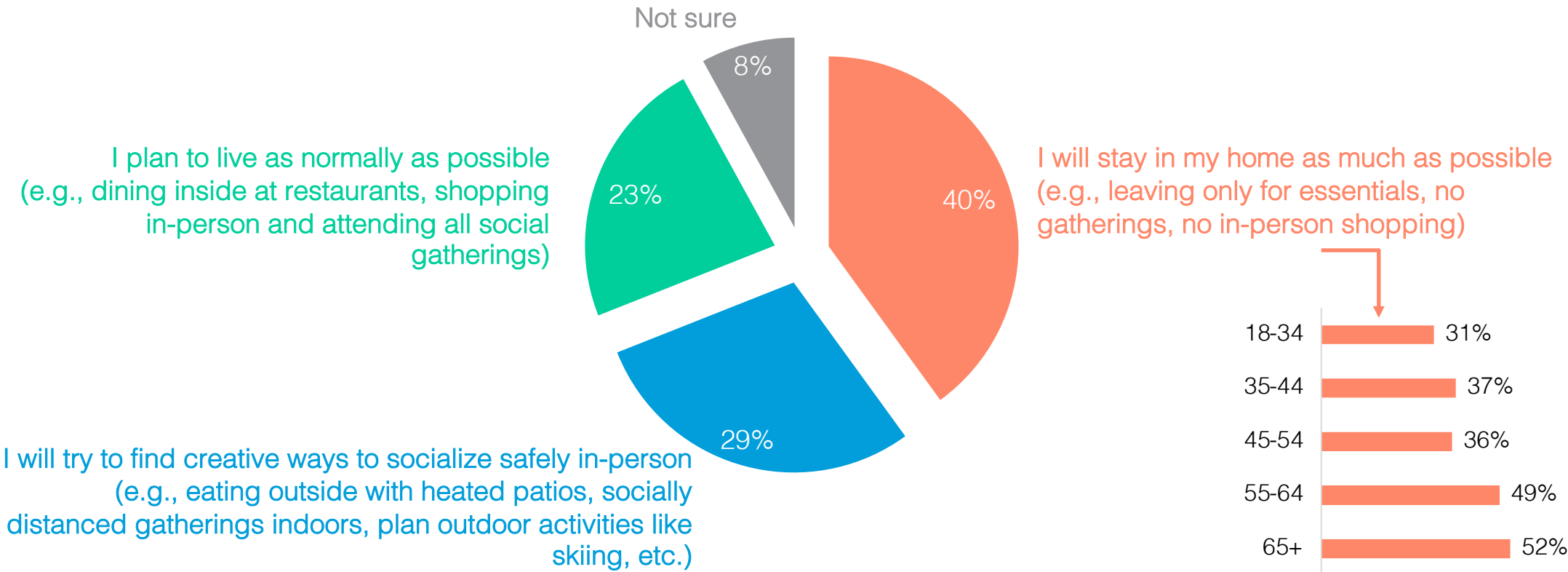
9%

My travel patterns will be **increasing** in number of trips and distance in comparison to pre-COVID



Nearly A Third Say They Will Find Creative Ways To Socialize Safely In-Person This Winter

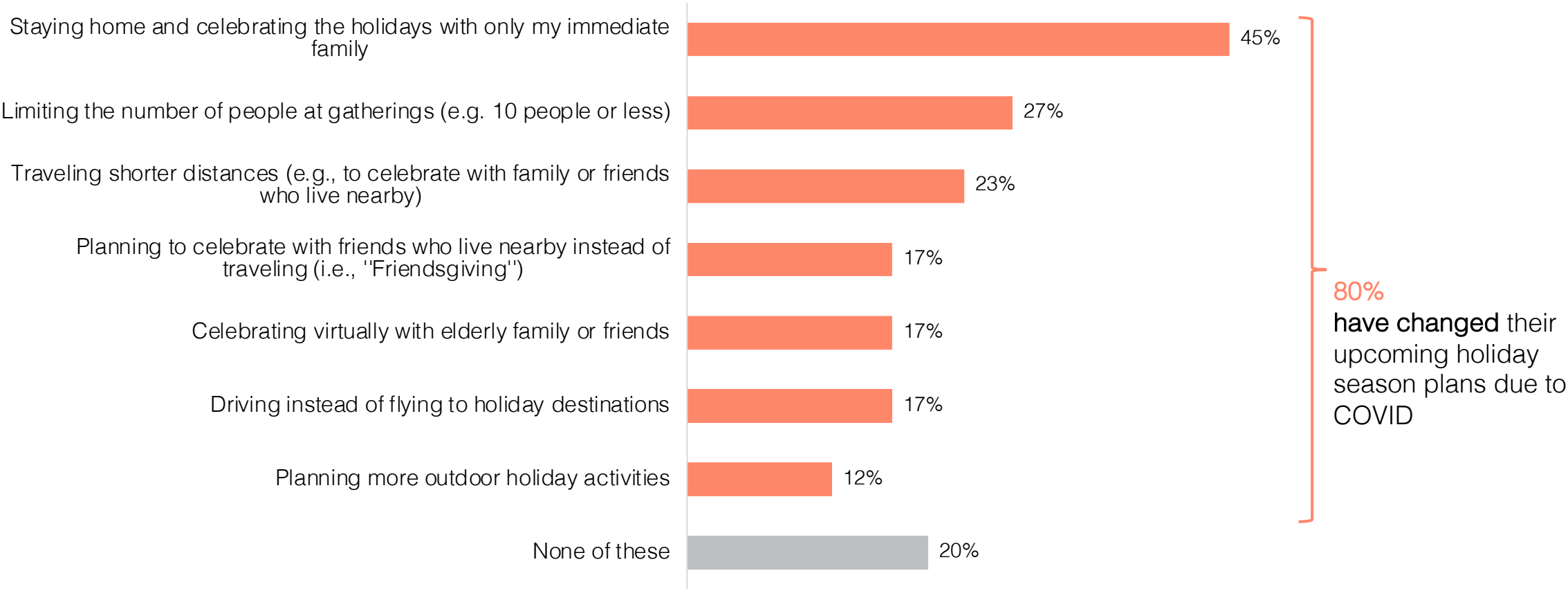
Thinking ahead to this fall and winter months with colder weather amid the COVID-19 pandemic, which of the following best describes your mindset to socializing and doing activities?





8 in 10 Consumers Have Changed Holiday Plans Due to COVID

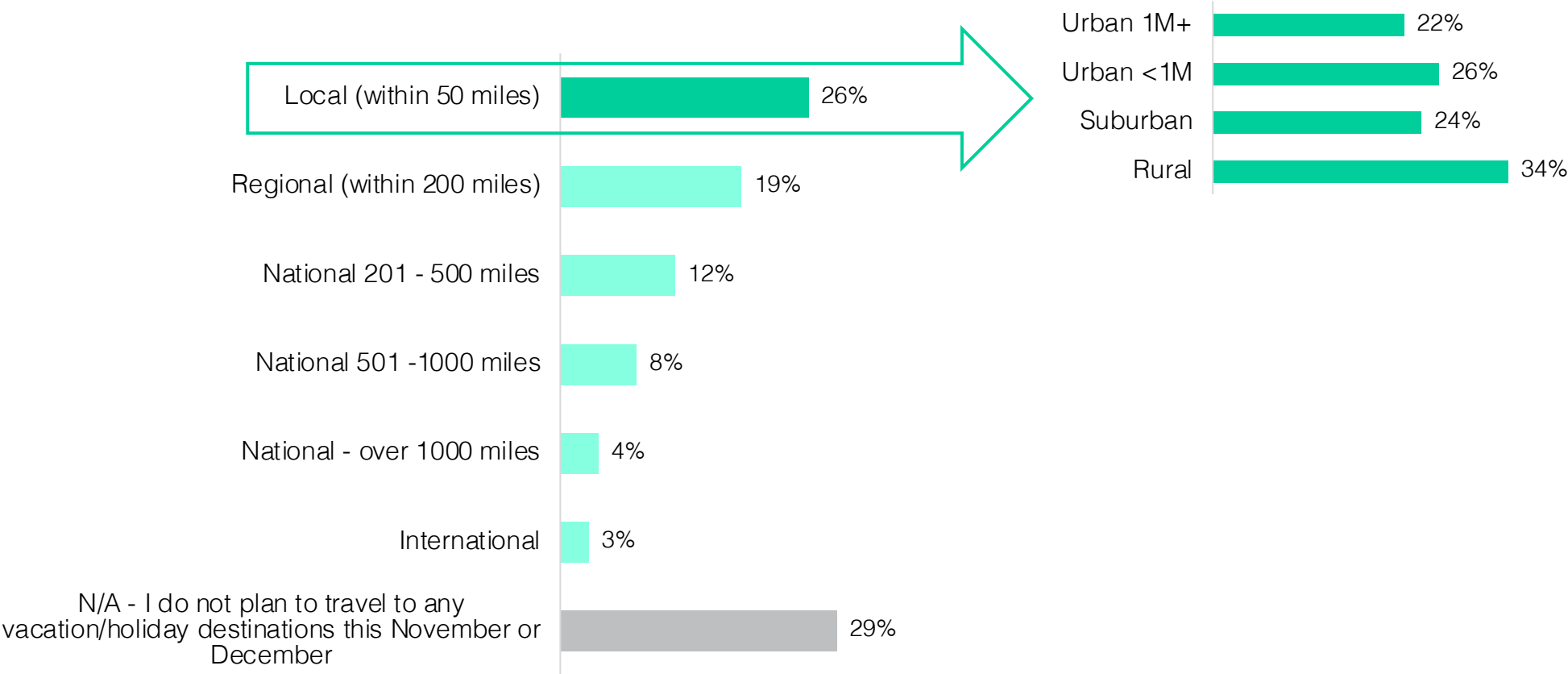
How has the COVID-19 pandemic **changed** your upcoming holiday season plans?





One-Quarter Will Travel Locally This Holiday Season; Non-Rural Americans Will Travel Farther

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

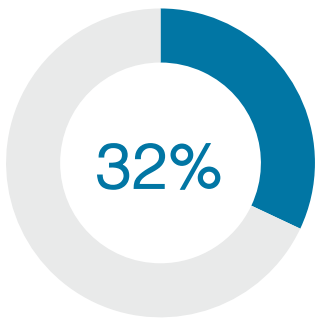


Base: All Qualified Respondents (2058)
Q5A. Approximately what is the farthest distance you plan to travel to reach any of your vacation or holiday destinations this November and December (one-way)?
Q5B. Thinking ahead to the holidays this November and December, will you be traveling a shorter or longer distance for the holidays this year versus last year?

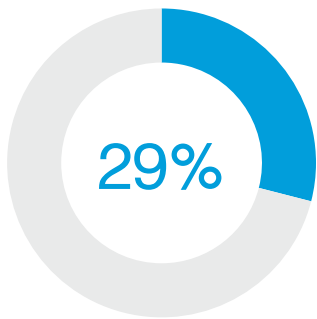


But Over 40% Plan to Travel the Same Distance or More than Last Year

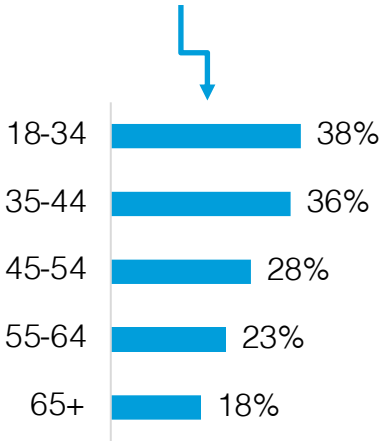
Thinking ahead to the holidays this November and December, will you be traveling a shorter or longer distance for the holidays this year versus last year?



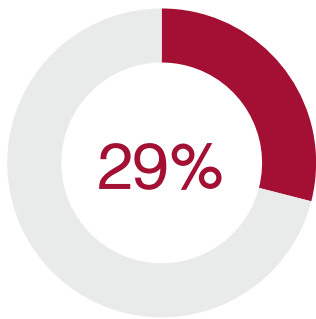
Traveling about the same distance as last year



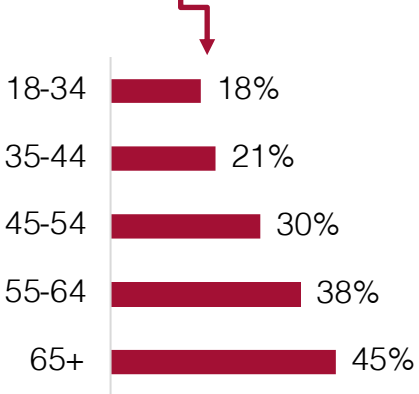
Traveling a shorter distance this year



Traveling a longer distance this year



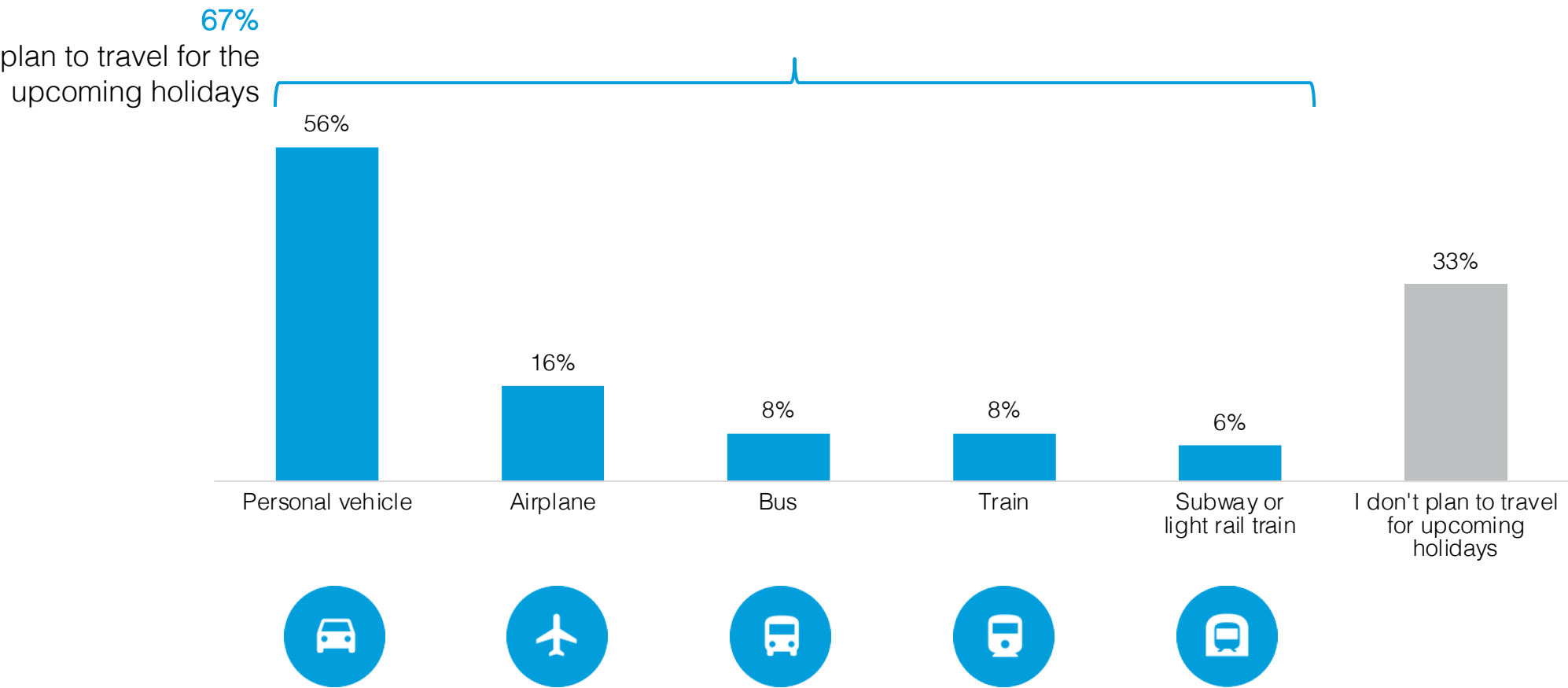
I do not plan to travel to any vacation / holiday destinations this November or December





Those Who Travel for the Holidays This Year Will Be Primarily Driving

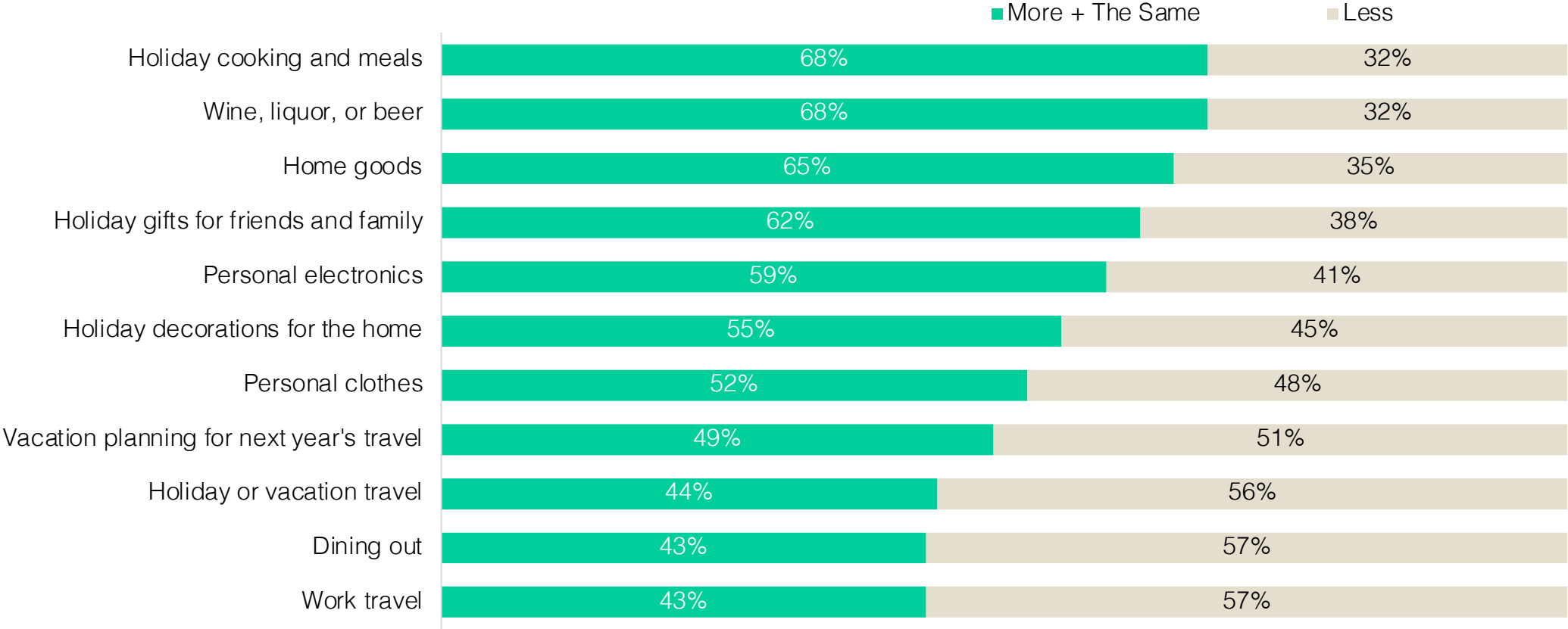
Thinking ahead to travel for the upcoming holidays (i.e., Thanksgiving, Hanukkah, Christmas, New Year's, etc.), which of the following modes of transportation do you intend to take? Please select all that apply.





Looking Ahead, Half of Americans Plan to Spend More or the Same on Holiday Gifts and Meals This Year

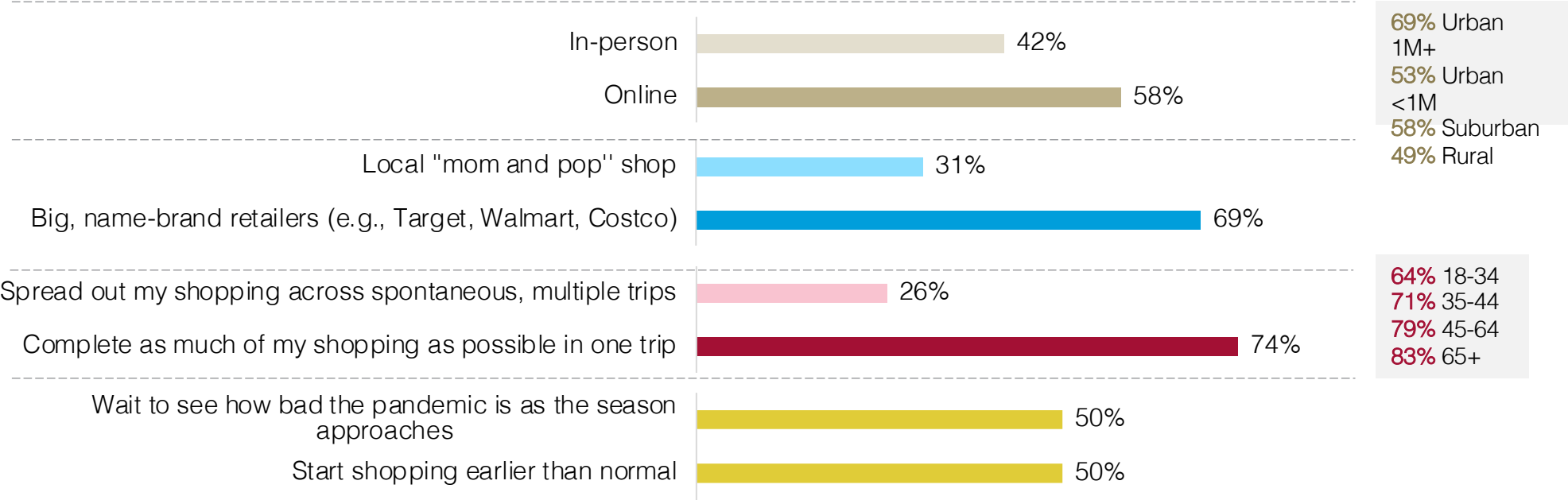
Looking ahead to the next 3 months, how much do you plan on spending this year compared to the same timeframe last year across the following areas?





COVID Is Changing Our Shopping Preferences

Considering the upcoming months (September-January), which of the following would you prefer in shopping given the ongoing COVID-19 pandemic?





Shopping Mindset Is All About Efficiency and Safety Due to COVID

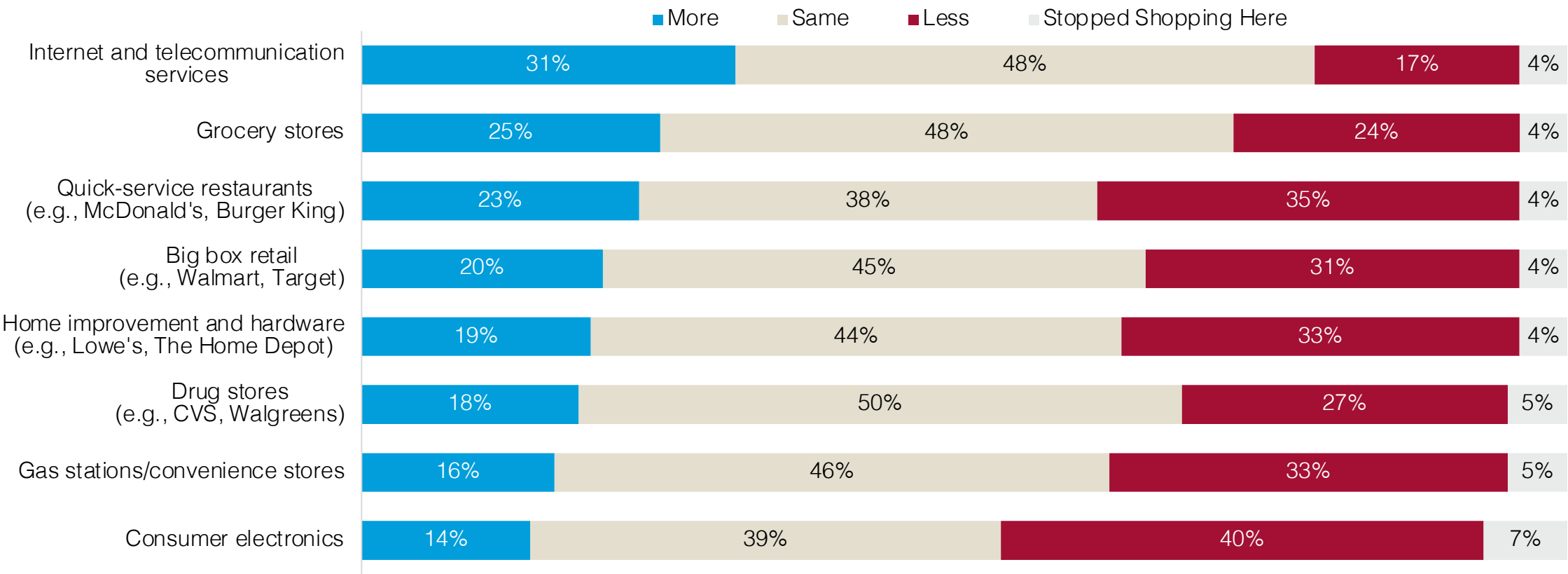
Which of the following statements regarding the COVID-19 pandemic would you say apply to **how your mindset has changed** in regard to shopping?





And, Consumer Spending Has Been Centered Around Equipping the Home

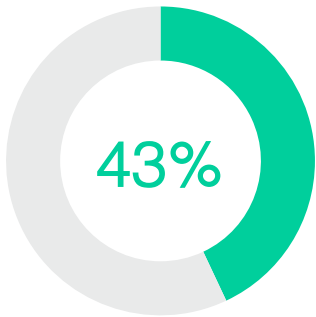
Since the start of the COVID-19 pandemic, are you generally shopping more or less at each of the following types of stores?





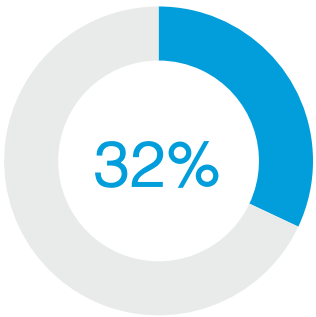
The Pandemic Made Consumers More Receptive to New Brands

Generally speaking, since the start of the COVID-19 pandemic, would you say you...



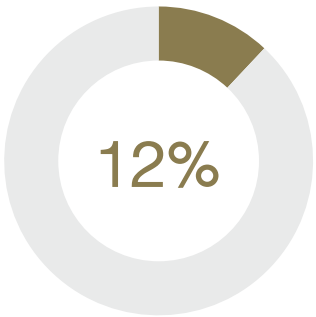
Use a mix of **new brands** and **brands you are familiar** with/use regularly

48% Female
38% Male



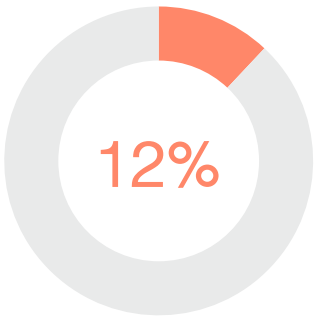
Use the **same brands** you **did before** and have not tried any new brands

22% 18-34
25% 35-44
37% 45-54
42% 55-64
42% 65+



Use **new brands** that you will **continue to use/replace** the ones I used to use

21% 18-34
18% 35-44
8% 45-54
4% 55-64
6% 65+

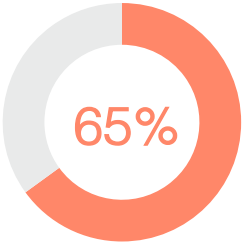


Use **new brands** because it's the **only choice / will switch back** when preferred brand is available again

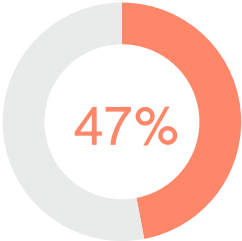
9% <\$50k
8% \$50k-<\$75k
11% \$75k-<\$100k
16% \$100k+



While COVID Has Made Consumers Reliant on Takeout, They Wish There Were More Outdoor Dining Options



Wish there were more outdoor dining offerings

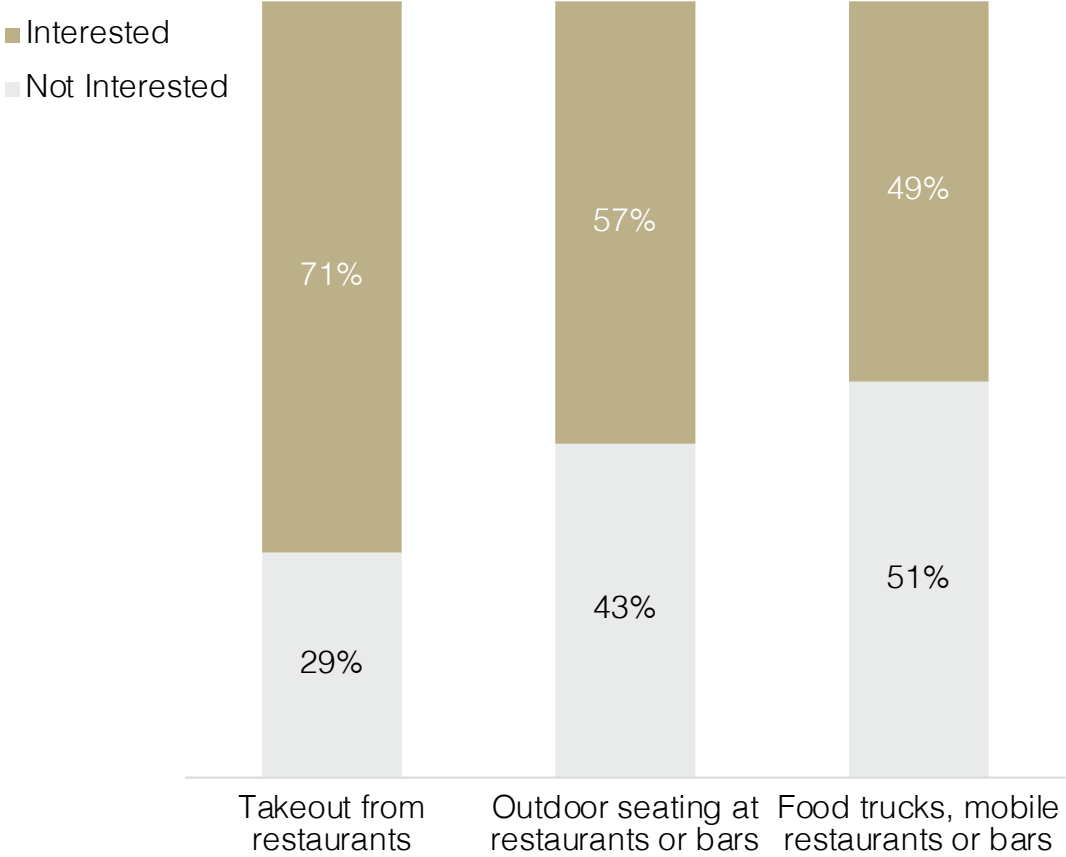


Are tired of cooking meals at home



31% are ordering food for delivery more
27% are picking up food from restaurants more

With social distancing restrictions due to the COVID-19 pandemic put into place, **how interested** are you in each of the following types of alternate activities?

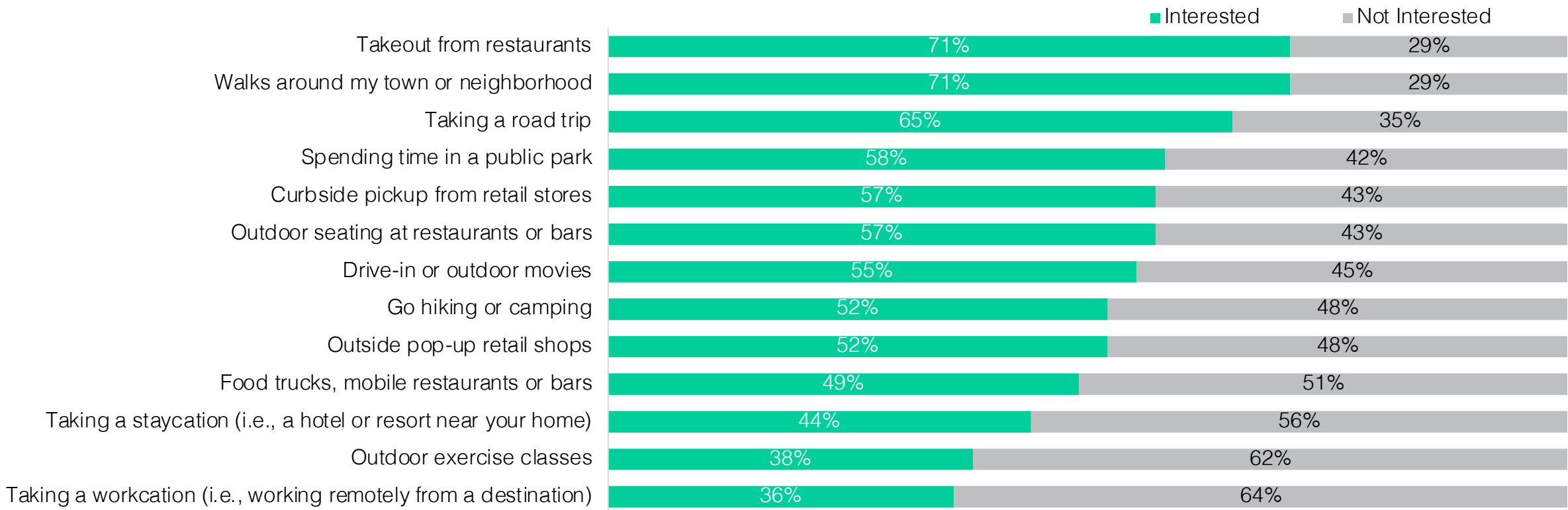


Base: All Qualified Respondents (2058)
Q12. How much do you agree or disagree with each of the following statements?
Q16. With social distancing restrictions due to the COVID-19 pandemic put into place, how interested are you in each of the following types of alternate activities?
Q8. Thinking ahead as we continue to move through the fall/winter (September – January) with the pandemic, are you planning to do more or less of each of the following than you were before the pandemic?



The Demand for Outdoor Experiences Is on the Rise

With social distancing restrictions due to the COVID-19 pandemic put into place, **how interested are you in each of the following types** of alternate activities?





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