

# OOH IMPACT: RETAIL & INFLUENCER MARKETING

APRIL 2023

 MORNING CONSULT<sup>®</sup>

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Out of Home Advertising Association of America

# KEY FINDINGS

- 1. Dynamic OOH Ad Content Increases Interest:** Forty percent of adults find OOH ads with timely information *more interesting* than typical ads. Black and Hispanic Americans, along with those who are college educated or with \$100K+ income find dynamic OOH ads *more interesting* than adults overall.
- 2. Ongoing Consumer Concern with Online Ads & Data Privacy:** A large majority of adults (75%) across all demographic groups *express high levels of concern* about the use of their personal information to target them with online ads, with the highest levels of concern expressed by adults 30-44, and those with high income and advanced education.
- 3. Key Product Categories for In-Store Shopping:** The most common items adults shop for in-person are *groceries, household supplies, restaurants/fast food meals, and clothes*. Hispanic and Black adults *over-index* adults broadly on shopping in-person for *drug store over-the-counter items/prescriptions* and *alcohol*.
- 4. OOH Influence on In-Store Purchase Decisions:** Two-thirds of adults (68%) *notice OOH ads on their way to a store to shop in-person* with higher rates among Black (78%) adults, Hispanic (76%) adults, and Asian (73%) adults. OOH ads have an *impact on in-person purchase decisions* with over 40 percent of adults (42%).
- 5. Most Compelling OOH Messages on In-Store Offers:** Among adults who find OOH ads impactful, the offers that have the most impact on how much they purchase in-person at a store are *buy one get one free, discount/promo codes, and free shipping or delivery*. Hispanic adults *over-index* adults broadly on the impact of *free shipping or delivery* on how much they purchase in-person at a store.
- 6. Favorability Toward Influencers in OOH Ads:** 31% of Adults *more likely to purchase a product/service with a familiar influencer, creator, or celebrity* in an OOH ad, with the highest likelihood among ages 30-44 (+31), post-grad degree (+31) or HHI \$100K+ (+35).
- 7. OOH Ads with Influencers Impact Social Media Engagement:** Two-in-five adults (39%) are *likely to re-post an OOH ad with a familiar influencer, creator, or celebrity*, with higher rates among adults who are 30-44 (52%), Hispanic (50%), Black (53%), make over \$100k (51%), or have a post-grad degree (51%).



## METHODOLOGY

This poll was conducted between March 3-5, 2023 among a sample of 1,681 Adults 18-64. The interviews were conducted online and the data were weighted to approximate a target sample of Adults 18-64 based on gender, age, race, educational attainment, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

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OOH + RETAIL MARKETING

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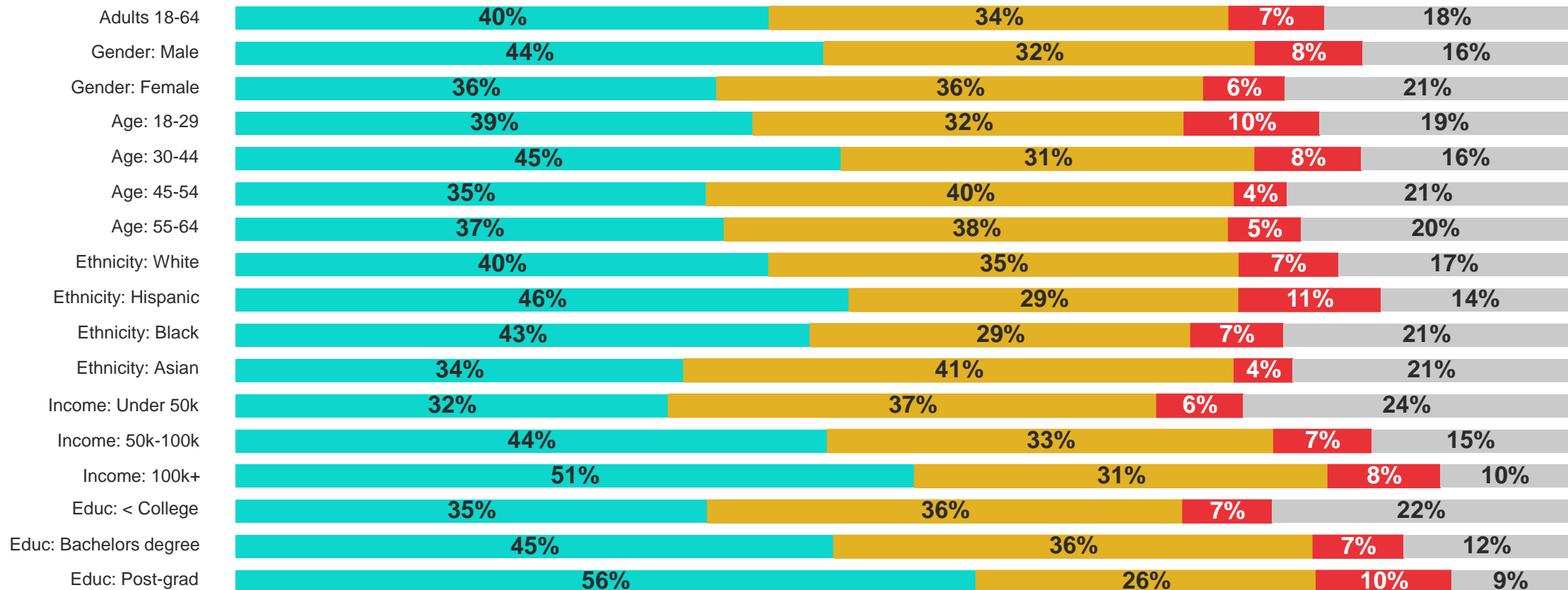
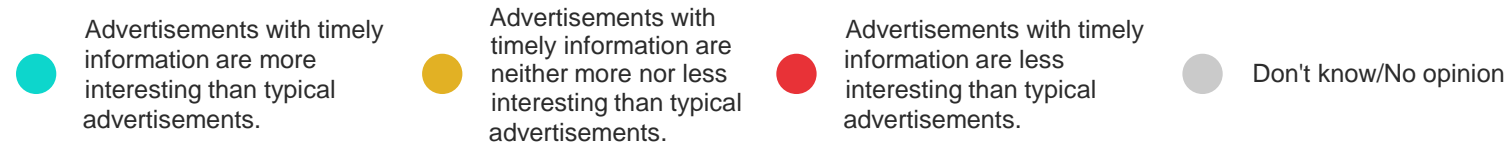
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OOH ADS

40% of adults find OOH ads with timely content of greater *interest* and highest interest among men, adults 30-44, Black and Hispanic Americans, high income and education HHs.

Do you find these advertisements with timely information more interesting, neither more nor less interesting, or less interesting than a typical advertisement?



OOH ADS

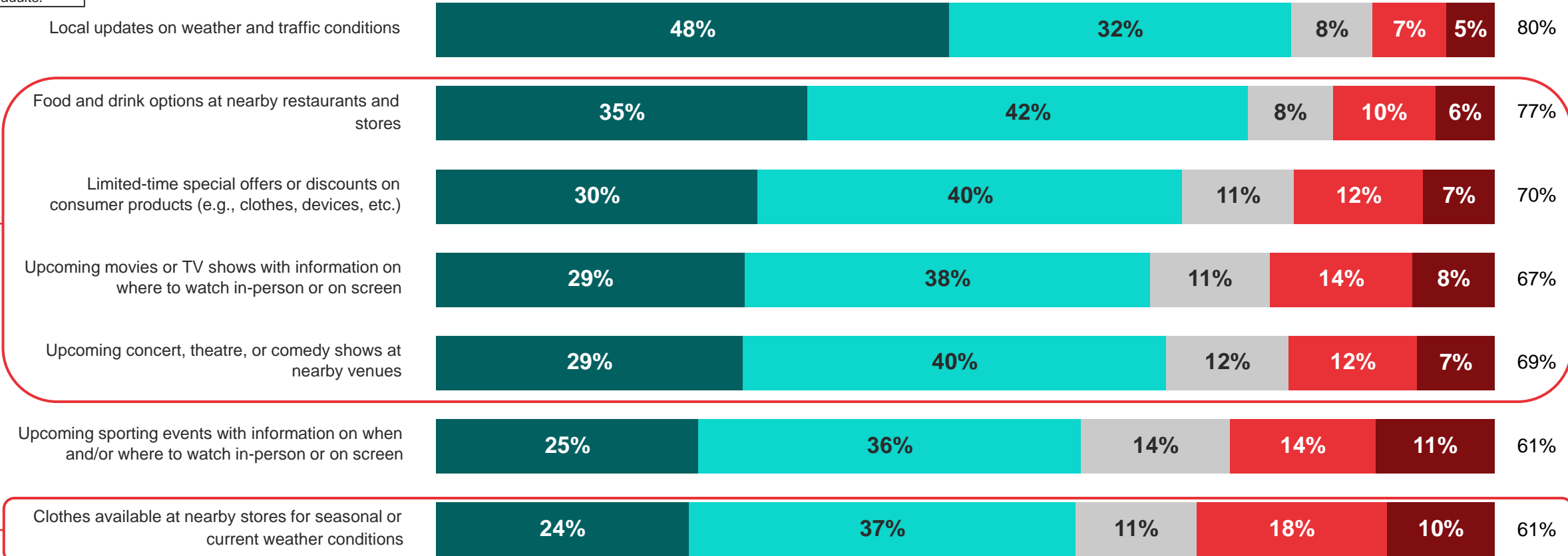
Over 60 percent of adults find these dynamic OOH ad messages to be helpful, with *local updates on weather/traffic conditions* and *food/drink dining options* noted as most helpful.

How helpful, if at all, do you find outdoor advertisements for each of the following?

Hispanic, Black, and Asian adults find each of these outdoor ads more helpful than white adults.

Very helpful   Somewhat helpful   Don't know/No opinion   Not too helpful   Not helpful at all

Total Helpful

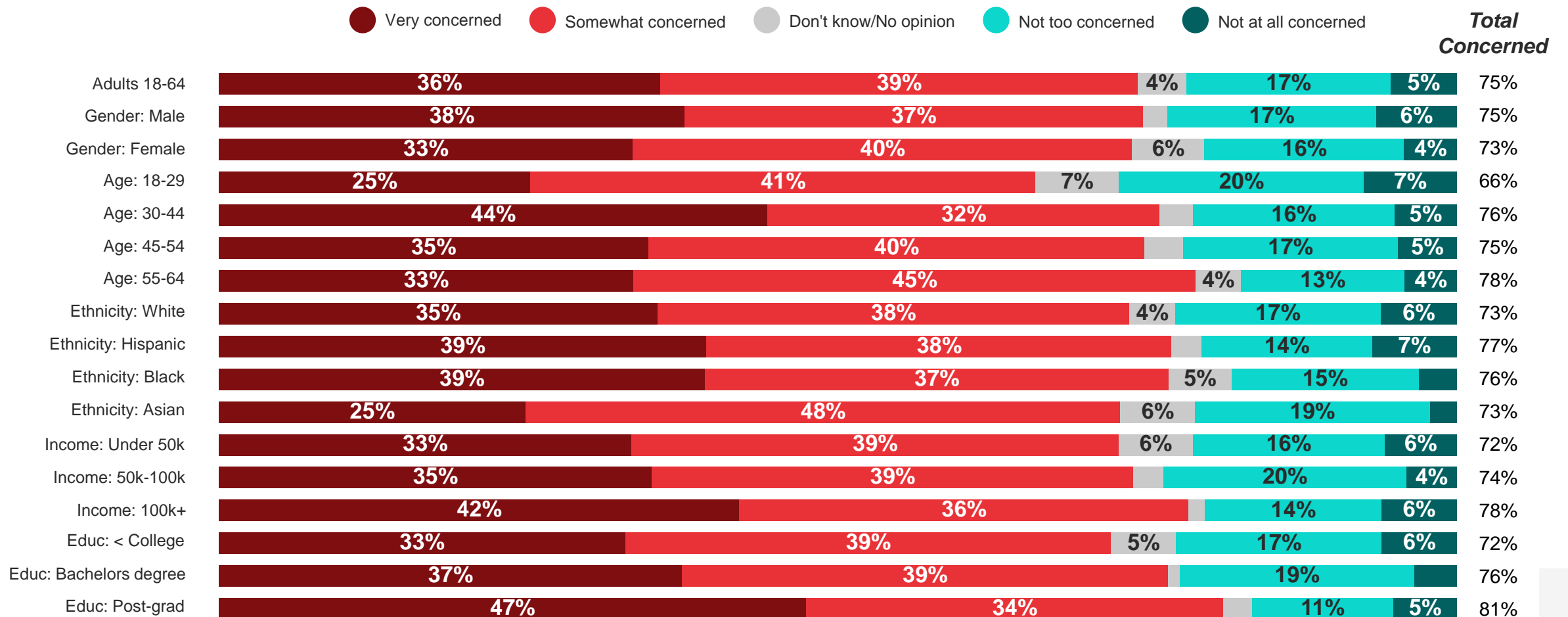


Total Helpful = Very helpful + Somewhat helpful

OOH ADS

75% of adults are concerned about the use of their personal information to target them with online ads, with highest concern among adults 30-44, high income and education HHs.

How concerned are you, if at all, about the use of your personal information (i.e., your privacy and online behavior) to target you with online advertisements?



Total Concerned = Very concerned + Somewhat concerned

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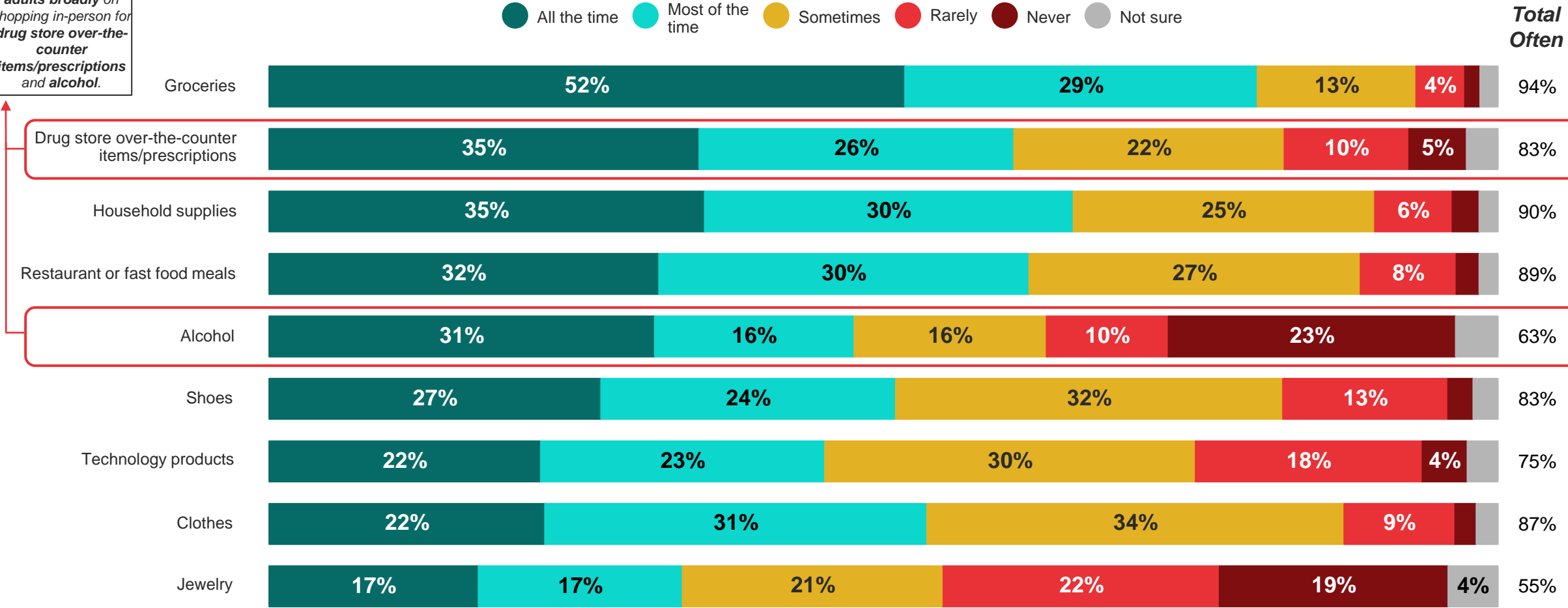


RETAIL MARKETING

At least half of adults shop for each of these items in-person, with half of adults (52%) shopping in-person *all the time* for groceries.

How often, if at all, do you shop for each of the following in-person?

Hispanic and Black adults over-index adults broadly on shopping in-person for drug store over-the-counter items/prescriptions and alcohol.

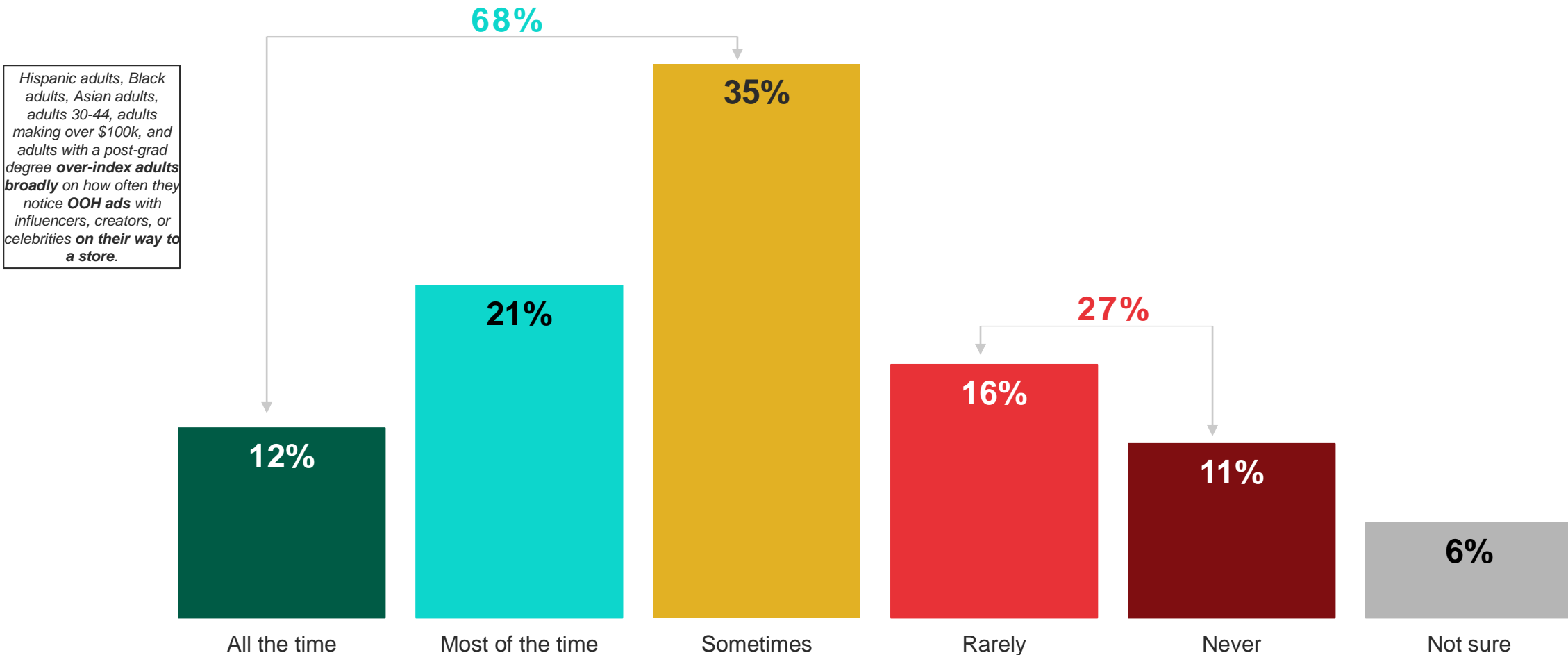


Total Often = All the time + Most of the time + Sometimes

RETAIL MARKETING

Two-thirds of adults (68%) notice OOH ads on their way to a store to shop in-person with higher rates among Black (78%) adults, Hispanic (76%) adults, and Asian (73%) adults.

How often, if at all, do you notice OOH advertising messages in each of the following types of formats or environments when you are on your way to a store to shop in-person? **Aggregated OOH** | *N = 1,651 Adults who Shop In-Person At Least Sometimes or More Often*



\*Aggregated OOH calculated as average across each form of OOH ad tested, numbers rounded.

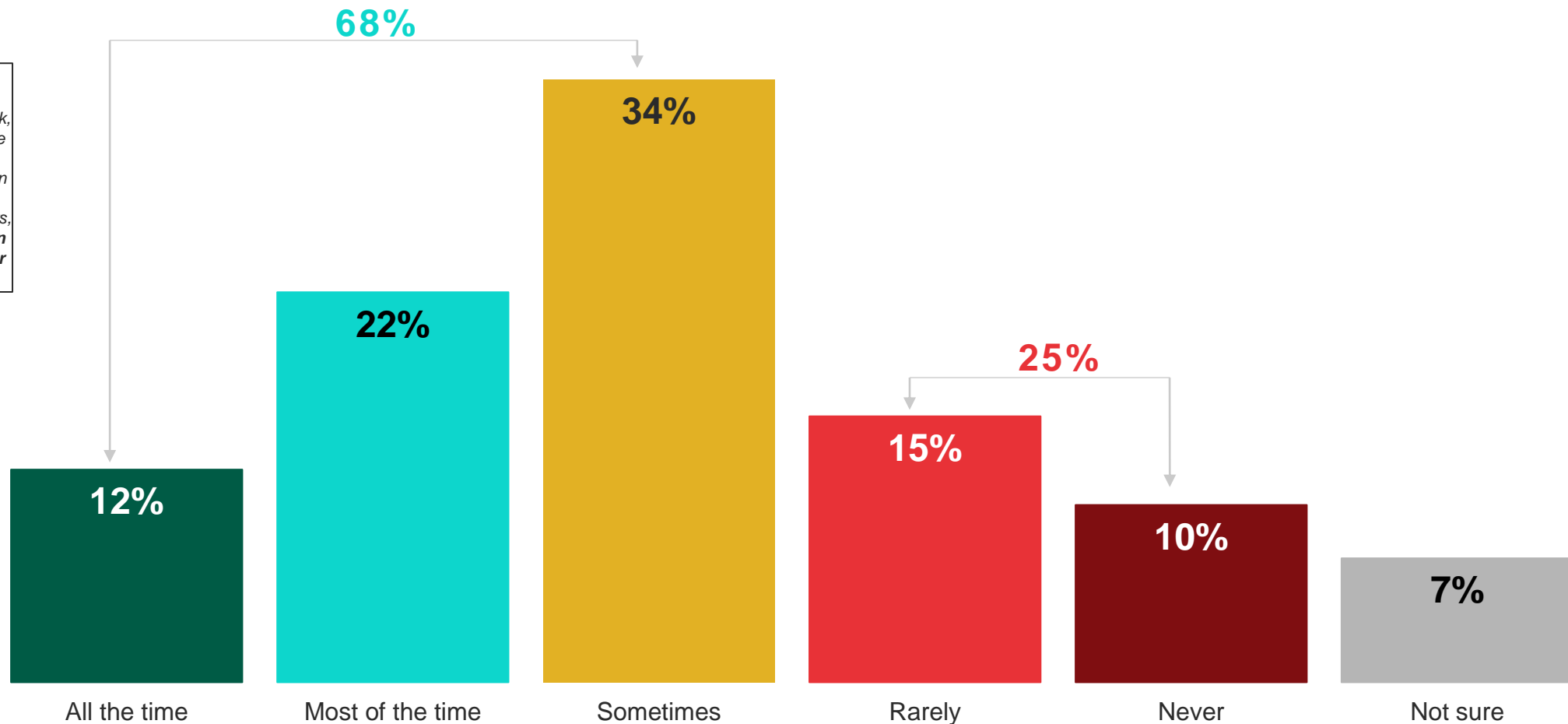
Total Often = All the time + Most of the time + Sometimes

RETAIL MARKETING

Two-thirds of adults (68%) notice OOH ads very close to or right outside a store with higher rates among Hispanic (76%) adults, Black (77%) adults, and adults making over \$100k (76%).

How often, if at all, do you notice OOH advertising messages in each of the following types of formats or environments when you are in very close proximity or right outside a store to shop in-person? **Aggregated OOH** | *N = 1,651 Adults who Shop In-Person At Least Sometimes or More Often*

Hispanic adults, Black adults, adults 30-44, adults making over \$100k, and adults with a college degree or more **over-index adults broadly** on how often they notice OOH ads with influencers, creators, or celebrities **in very close proximity or right outside a store.**



\*Aggregated OOH calculated as average across each form of OOH ad tested, numbers rounded.

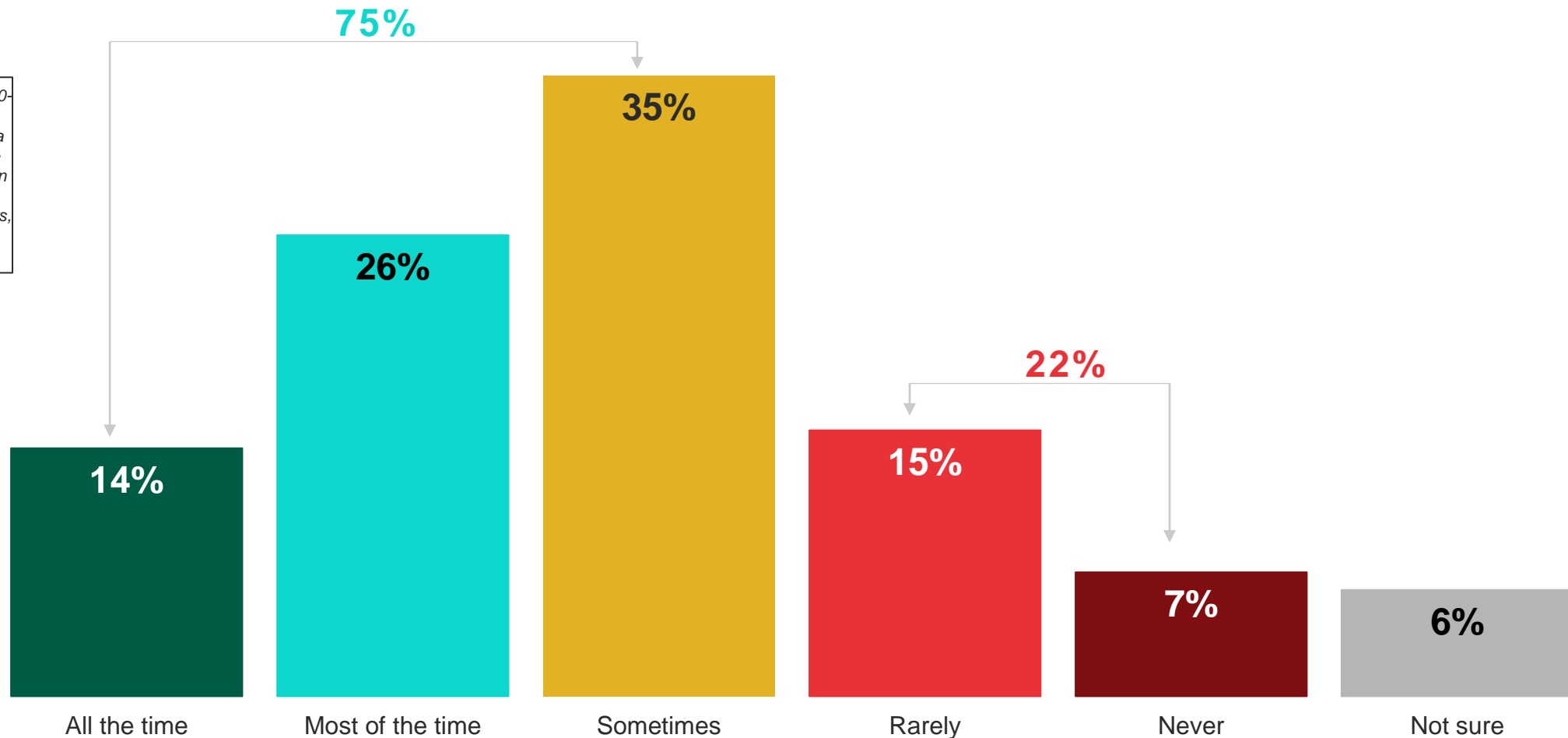
Total Often = All the time + Most of the time + Sometimes

RETAIL MARKETING

Three-fourths of adults (75%) notice OOH ads inside a store with higher rates among adults 30-44 (81%), adults making over \$100k (81%), and adults with a post-grad degree (85%).

How often, if at all, do you notice advertising messages in each of the following types of formats or environments when you are inside a store to shop in-person? **Aggregated OOH** | *N = 1,651 Adults who Shop In-Person At Least Sometimes or More Often*

Hispanic adults, adults 30-44, adults making over \$100k, and adults with a post-grad degree **over-index adults broadly** on how often they notice OOH ads with influencers, creators, or celebrities inside a store.



\*Aggregated OOH calculated as average across each form of OOH ad tested, numbers rounded.

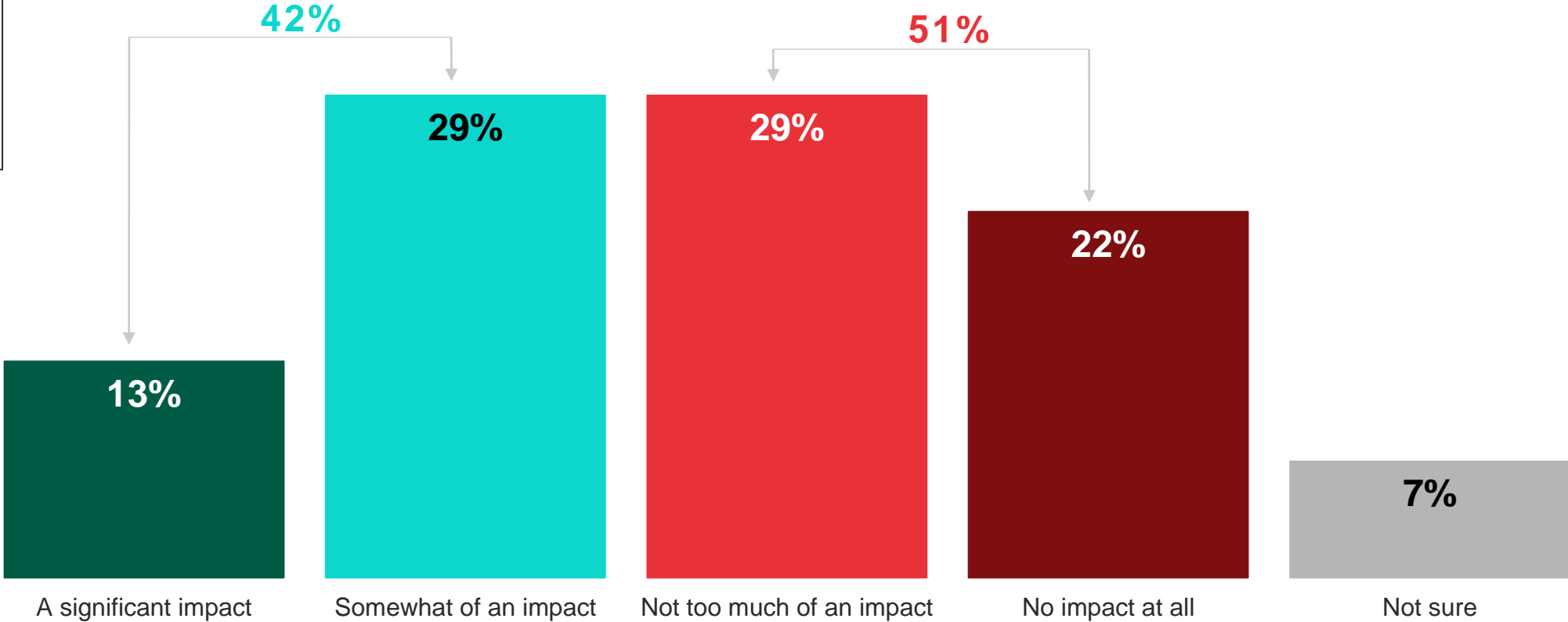
Total Often = All the time + Most of the time + Sometimes

RETAIL MARKETING

OOH ads have a *significant impact* or *somewhat of an impact* on two-in-five adults' (42%) in-person purchase decisions.

How much of an impact, if any, do advertisements in each of the following types of formats or environments have on purchase decisions you make in-person at a store? **Aggregated OOH**

Hispanic adults, Black adults, adults 30-44, adults making over \$100k, and adults with a college degree or more significantly over-index adults broadly on the impact of OOH ads on purchase decisions.



\*Aggregated OOH calculated as average across each form of OOH ad tested, numbers rounded.

Total Often = All the time + Most of the time + Sometimes

RETAIL MARKETING

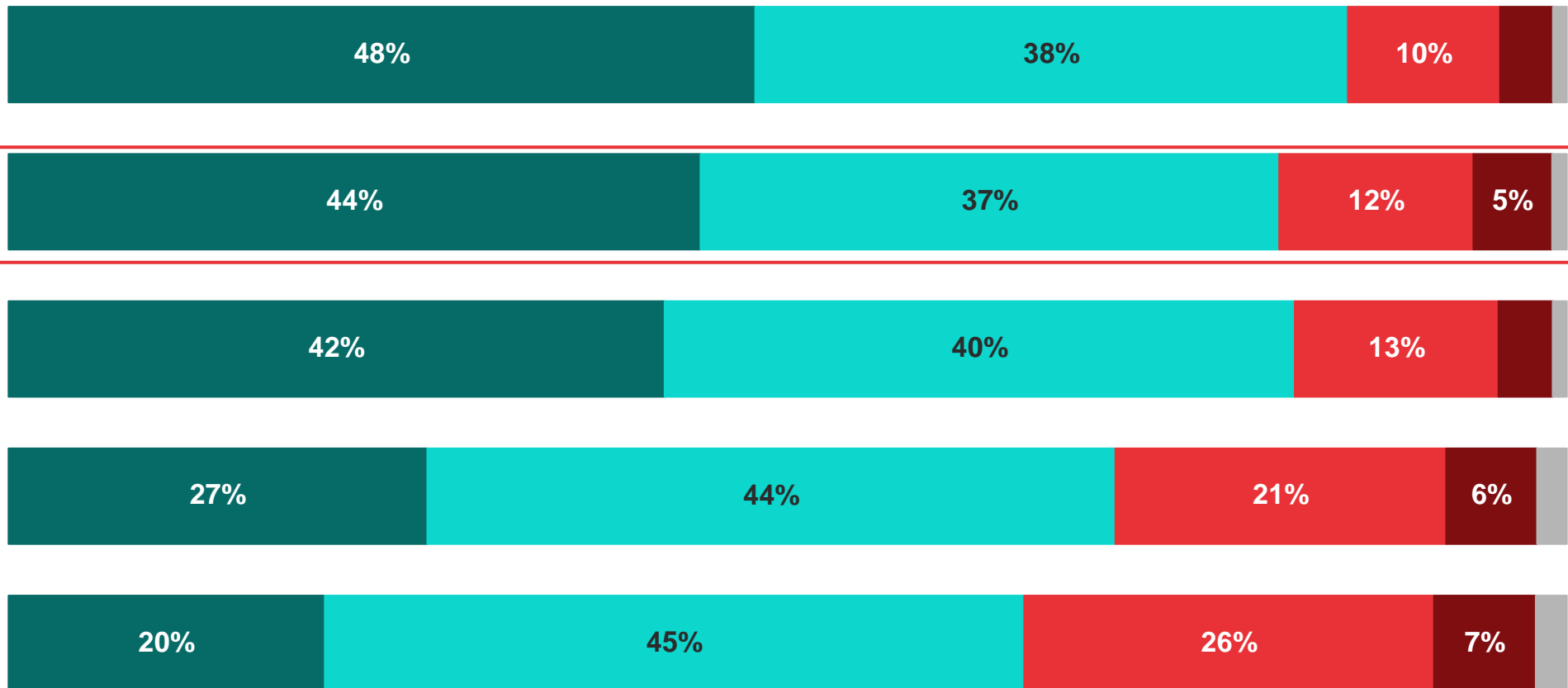
Two-in-five adults say *buy one get one free* (48%), *free shipping or delivery* (44%), and a *discount or promo code* (42%) have a significant impact on how much they buy in-person.

How much of an impact, if any, do each of the following types of offers have on how much you purchase in-person at a store? *N = 1,341 Adults whose Purchase Decisions are Impacted by Any Form of OOH Ads*

Hispanic adults over-index adults broadly on the impact of free shipping or delivery on how much they purchase in-person at a store.

● A significant impact  
 ● Somewhat of an impact  
 ● Not too much of an impact  
 ● No impact at all  
 ● Not sure

**Total Impact**



Total Impact = A significant impact + Somewhat of an impact

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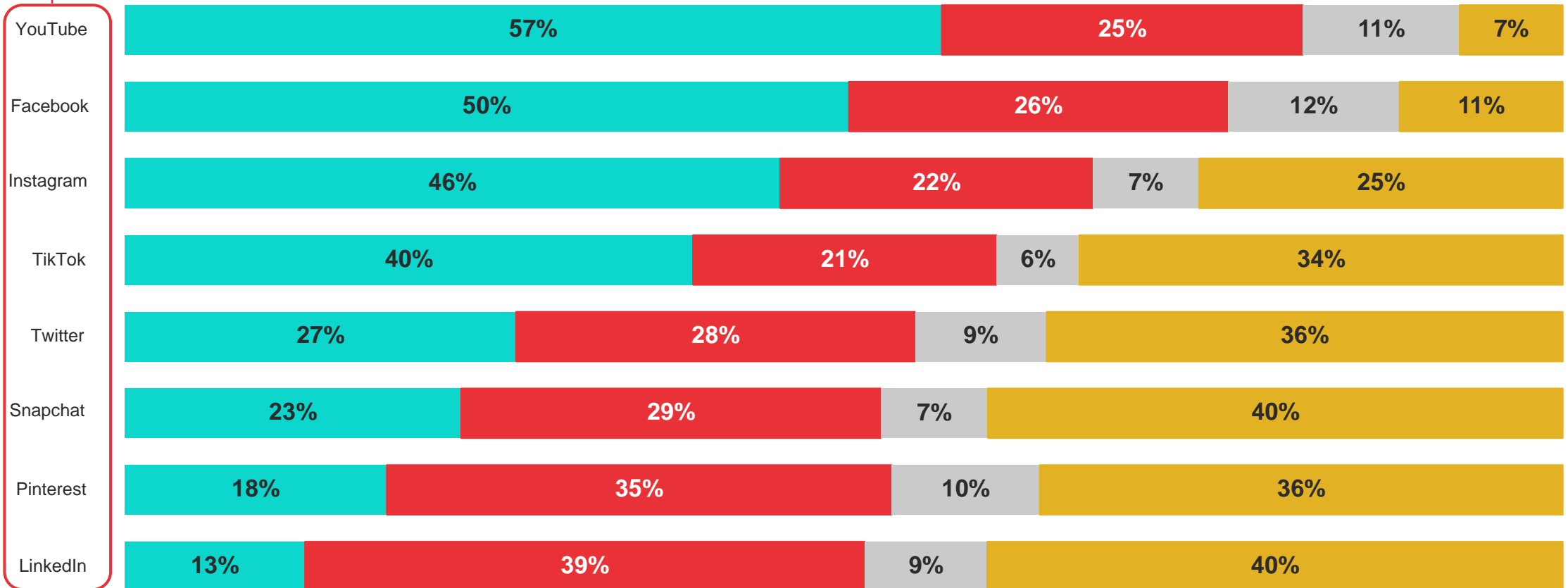


INFLUENCER MARKETING

At least half of adults have seen ads that feature influencers, creators, or celebrities on *YouTube* (57%) and *Facebook* (50%) in the past three months.

In the past three months, have you seen advertisements that feature influencers, creators, or celebrities on each of the following social media or online platforms?

● Yes    
 ● No    
 ● Don't know/Unsure    
 ● I don't use this social media or online platform

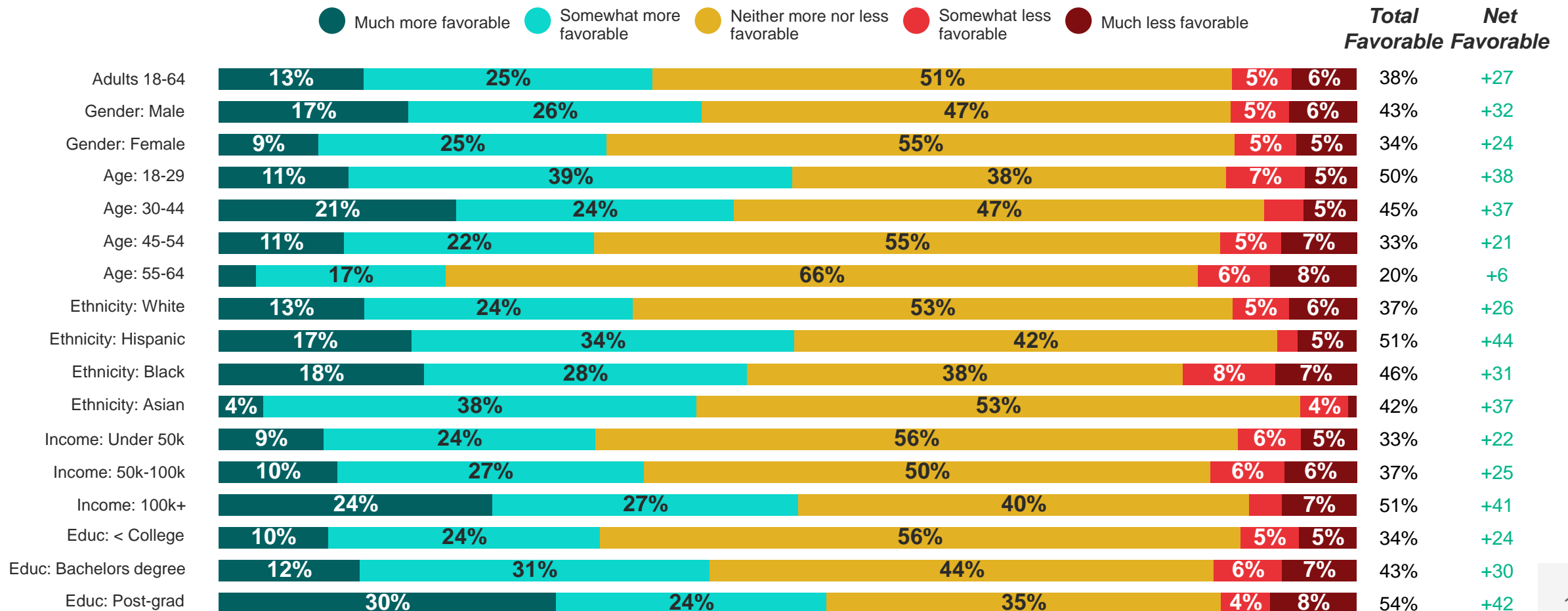


Hispanic adults, adults 30-44, adults making over \$100k, and adults with a post-grad degree have seen ads with influencers, creators, or celebrities on each of these platforms at higher rates than adults broadly.



Adults express a *net positive favorability* towards a brand with a familiar influencer, creator, celebrity in the ad - highest among ages 18-44 (+37-38), Hispanic (+44), affluent (+41) and educated HHs (+42).

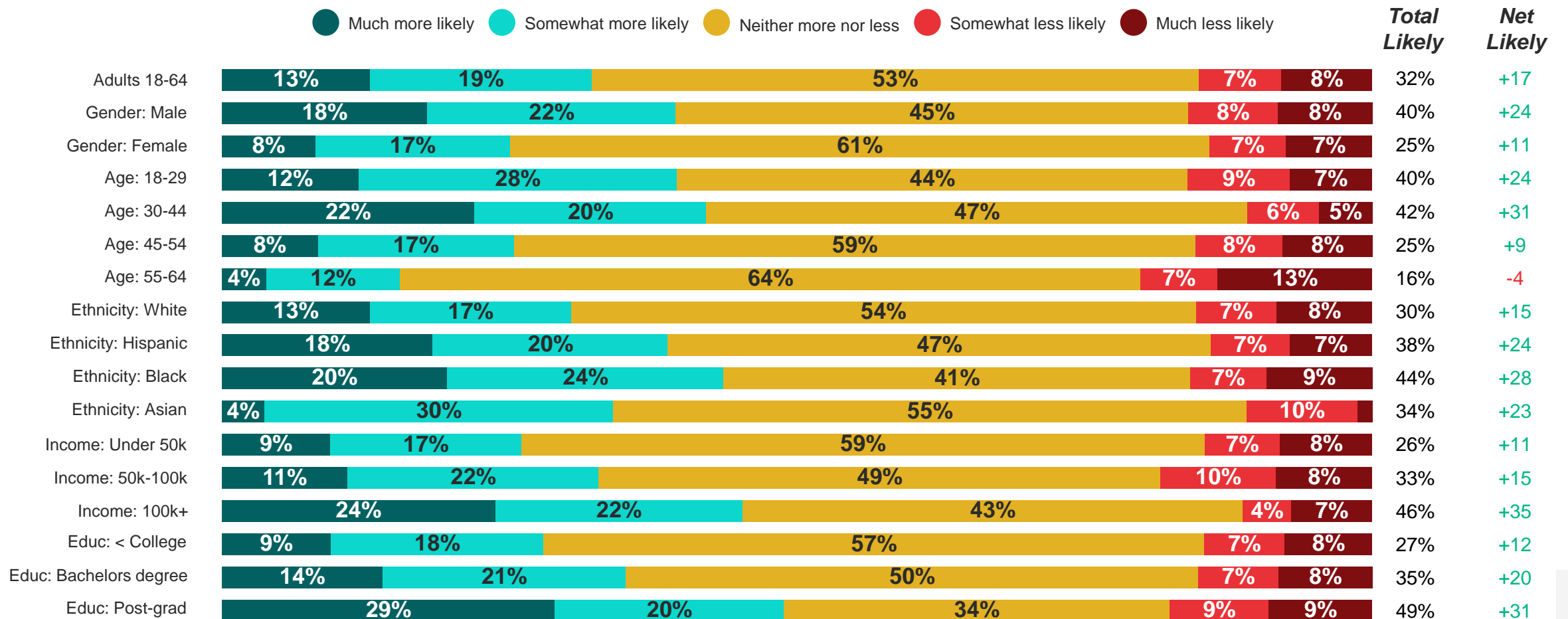
Are you more favorable, neither more nor less favorable, or less favorable towards a brand when you are familiar with the influencer, creator, or celebrity involved in their advertisement?



Total Favorable = Much more favorable + Somewhat more favorable | Net Favorable = (Much more favorable + Somewhat more favorable) - (Much less favorable + Somewhat less favorable)

32% of Adults *more likely to purchase* a product/service with a familiar influencer, creator, or celebrity in an OOH ad – highest among ages 30-44 (+31), post-grad degree (+31) or HHI \$100K+ (+35).

•Are you more likely, neither more nor less likely, or less likely to purchase a product or service if you see an influencer, creator, or celebrity from a social media or online platform that you are familiar with promoting that product or service in an OOH ad?

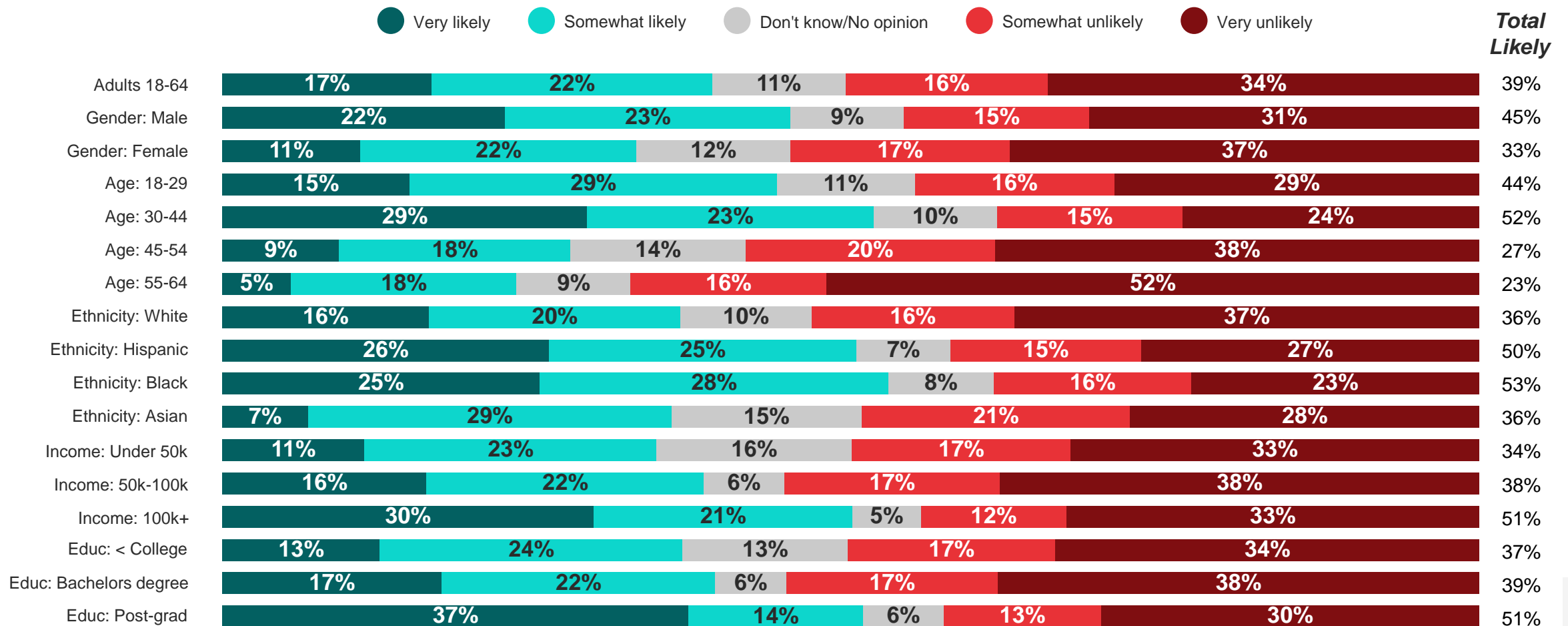


Total Likely = Much more likely + Somewhat more likely | Net Likely = (Much more likely + Somewhat more likely) – (Much less likely + Somewhat less likely)

INFLUENCER MARKETING

Two-in-five adults (39%) are likely to re-post an OOH ad with a familiar influencer, creator, or celebrity, with *higher rates* among adults who are 30-44 (52%), Hispanic (50%), Black (53%), make over \$100k (51%), or have a post-grad degree (51%).

How likely or unlikely are you to re-post on a social media or online platform an OOH ad featuring an influencer, creator, or celebrity that you are familiar with?



Total Likely = Very likely + Somewhat likely

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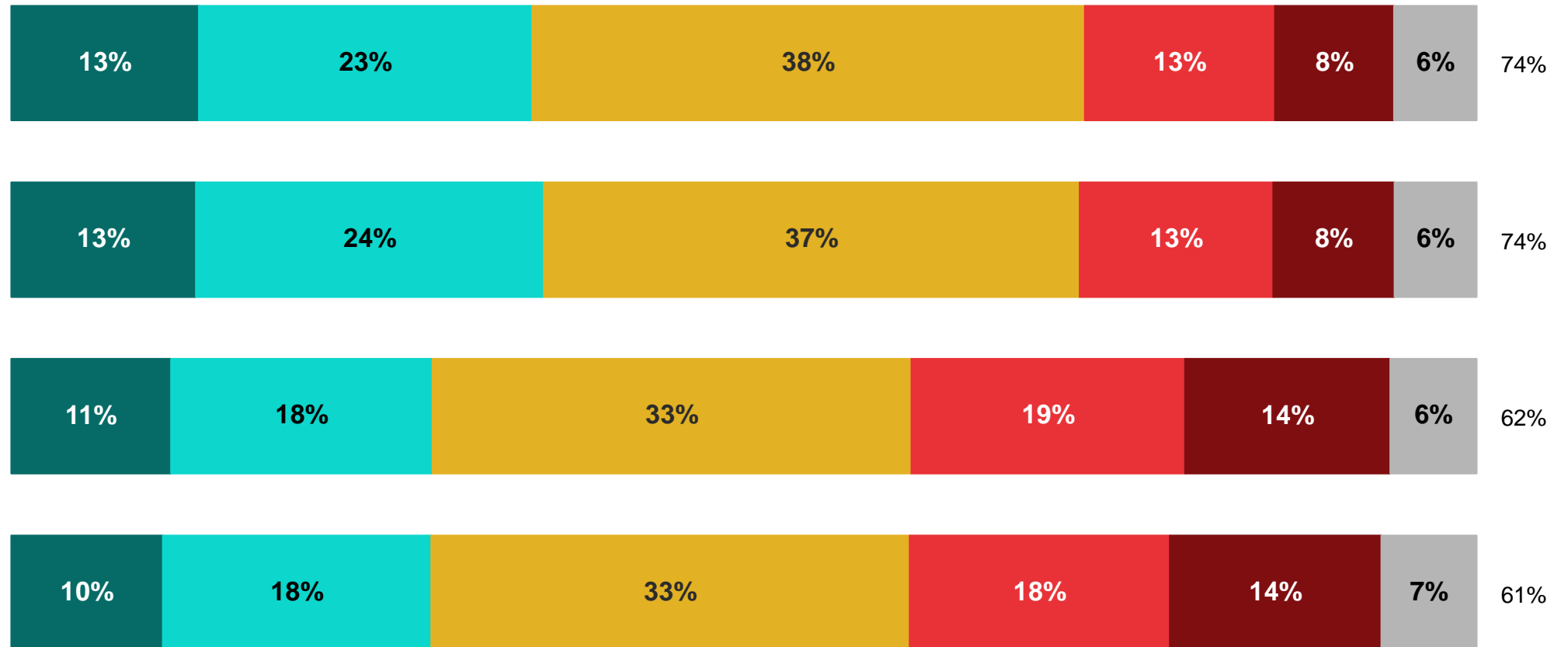
RETAIL MARKETING

# Three-fourths of adults notice *billboards* (74%) and *signs in places of business* (74%) on their way to a store to shop in-person.

How often, if at all, do you notice OOH ad messages in each of the following types of formats or environments when you are on your way to a store to shop in-person? *N = 1,651 Adults who Shop In-Person At Least Sometimes or More Often*

● All the time  
 ● Most of the time  
 ● Sometimes  
 ● Rarely  
 ● Never  
 ● Not sure

**Total Often**



Total Often = All the time + Most of the time + Sometimes

Hispanic adults, Black adults, adults 30-44, adults making over \$100k, and adults with a college degree or more notice outdoor ads in each of these formats at higher rates on their way to a store than adults broadly.

RETAIL MARKETING

Three-fourths of adults notice *signs in places of business* (74%) and seven-in-ten notice *billboards* (71%) very close to or right outside a store to shop in-person.

How often, if at all, do you notice OOH ad messages in each of the following types of formats or environments when you are in very close proximity or right outside a store to shop in-person? *N = 1,651 Adults who Shop In-Person At Least Sometimes or More Often*

● All the time 
 ● Most of the time 
 ● Sometimes 
 ● Rarely 
 ● Never 
 ● Not sure

**Total Often**

Hispanic adults, Black adults, Asian adults, adults making over \$100k, and adults with a college degree or more significantly over-index adults broadly on how often they notice transit ads in very close proximity or right outside a store.

Billboards, posters, wall murals



Signs in places of business

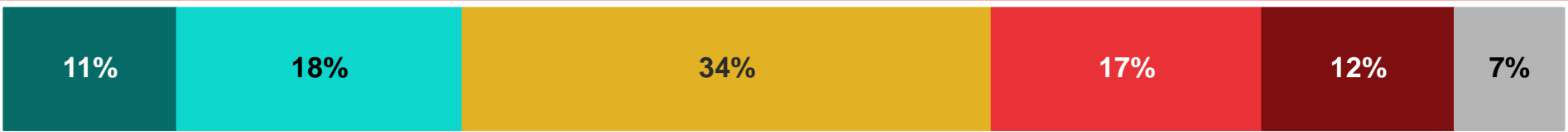


Transit



Black adults and adults with a post-grad degree significantly over-index adults broadly on how often they notice street level ads in very close proximity or right outside a store.

Street level



Total Often = All the time + Most of the time + Sometimes

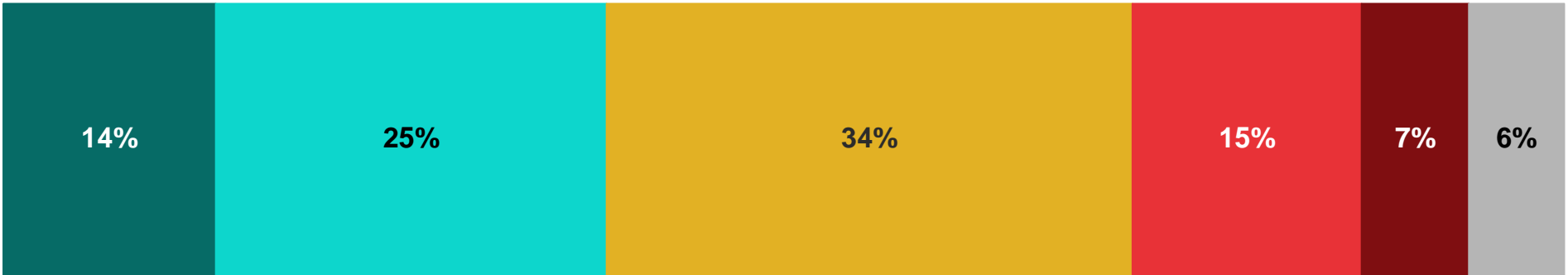
RETAIL MARKETING

Three-fourths of adults notice *printed signs in places of business* (75%) and *digital signs in places of business* (73%) inside a store to shop in-person.

How often, if at all, do you notice ad messages in each of the following types of formats or environments when you are inside a store to shop in-person? *N = 1,651 Adults who Shop In-Person At Least Sometimes or More Often*

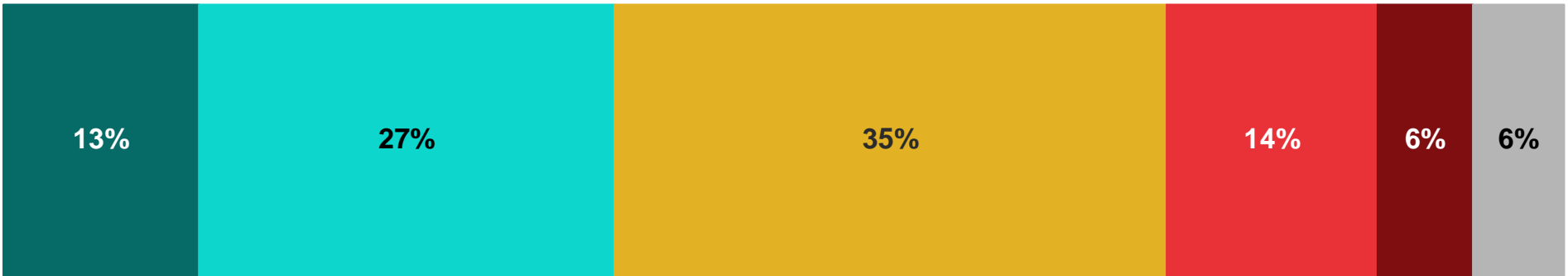
● All the time  
 ● Most of the time  
 ● Sometimes  
 ● Rarely  
 ● Never  
 ● Not sure

**Total Often**



Digital signs in places of business

Adults 44 and under, Hispanic adults, Asian adults, adults making over \$50k, and adults with a college degree or more **over-index** adults broadly on how often they notice **digital signs** and **printed signs** inside a store.



Printed signs in places of business

Total Often = All the time + Most of the time + Sometimes

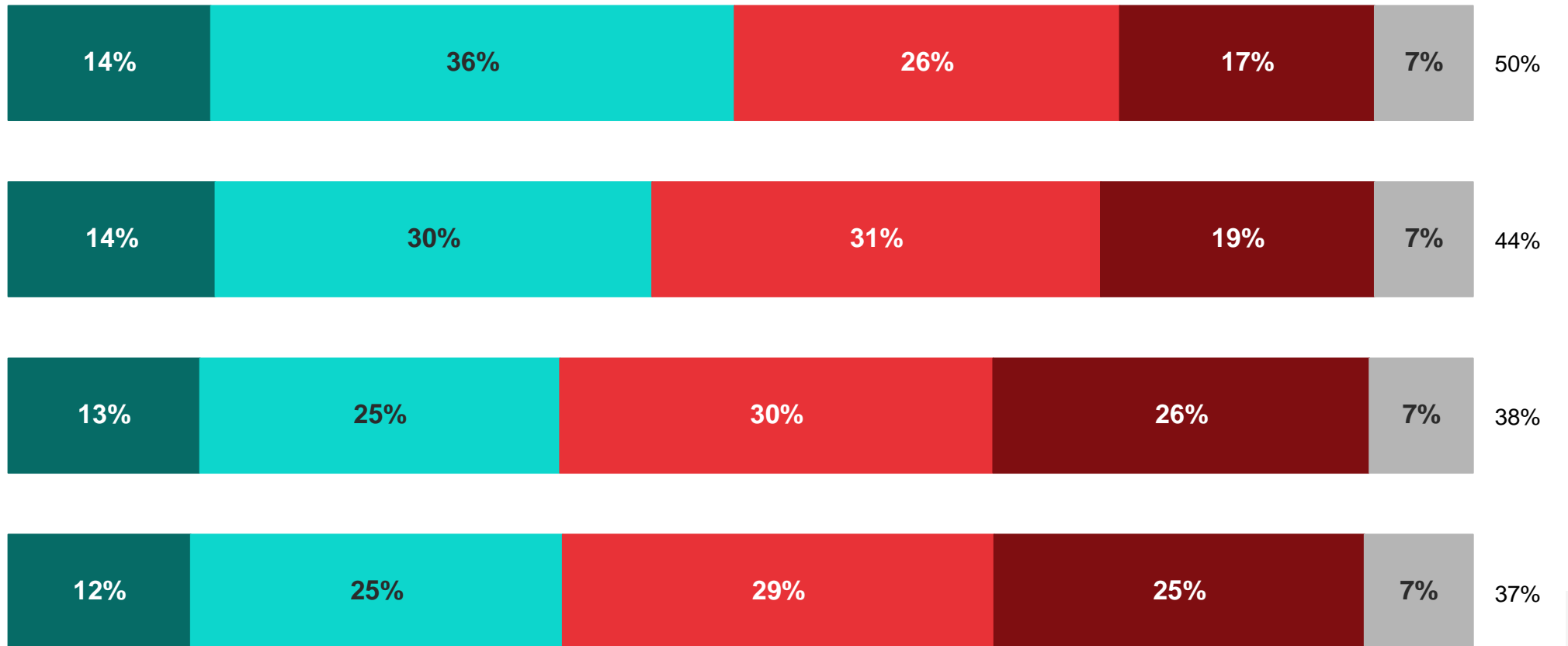
RETAIL MARKETING

*Signs in places of business* have an impact on half of adults' (50%) in-person purchasing decisions while *billboards* impact two-in-five adults' (44%) in-person purchasing decisions.

How much of an impact, if any, do advertisements in each of the following types of formats or environments have on purchase decisions you make in-person at a store?

● A significant impact  
 ● Somewhat of an impact  
 ● Not too much of an impact  
 ● No impact at all  
 ● Not sure

**Total Impact**



Total Impact = A significant impact + Somewhat of an impact

Hispanic adults, Black adults, adults 30-44, adults making over \$100k, and adults with a post-grad degree significantly over-index adults broadly on the impact of each form of ads on purchase decisions.

Signs in places of business

Billboards, posters, wall murals

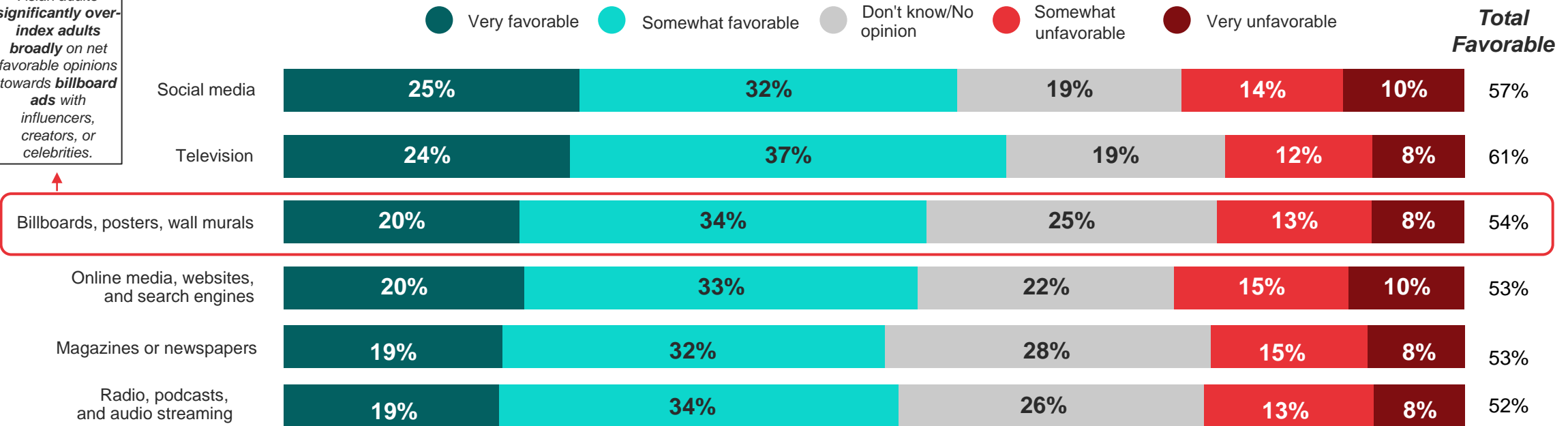


INFLUENCER MARKETING

Adults have a *net positive favorability* towards ads with influencers, creators, or celebrities in each setting.

Do you have a favorable or unfavorable opinion towards advertisements with influencers, creators, or celebrities in each of the following settings?

Adults 30-44, Hispanic adults, Black adults, and Asian adults significantly over-index adults broadly on net favorable opinions towards billboard ads with influencers, creators, or celebrities.



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

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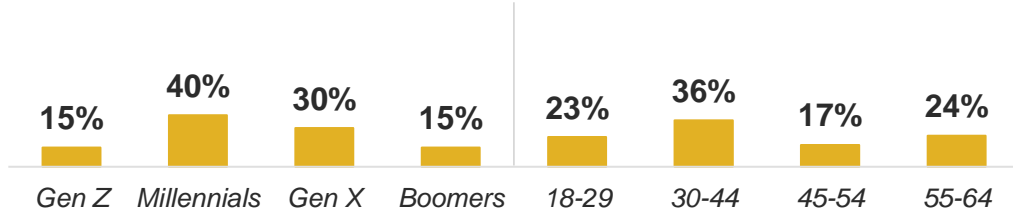
Demographic breakdown of adults 18-64.

Adults 18-64

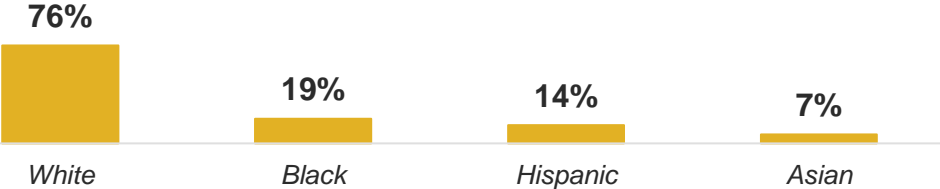
GENDER



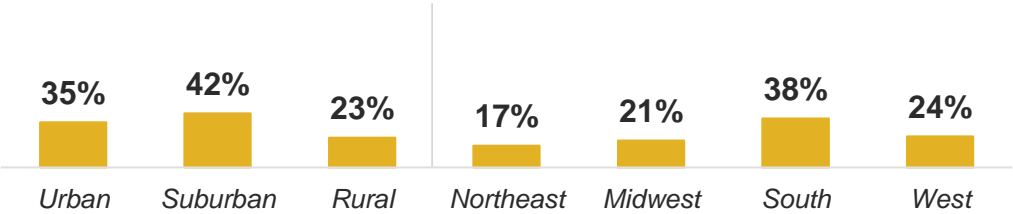
GENERATION & AGE



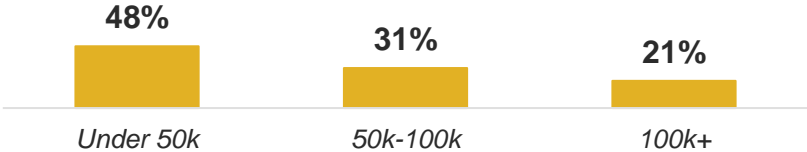
ETHNICITY



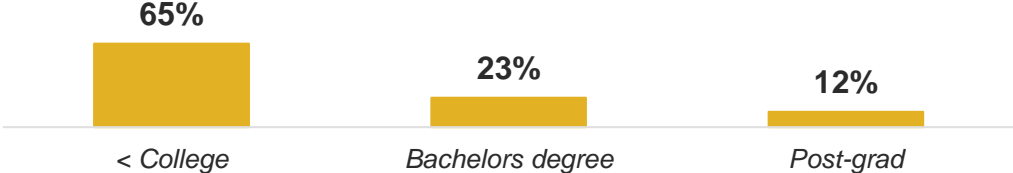
COMMUNITY TYPE & REGION



INCOME



EDUCATION



Percentages calculated as N size out of total respondents (N = 1,681).

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