

THE NEW CURRENCY: WHY OUT OF HOME EARNs ATTENTION AND HOW CONSUMERS SPEND IT

OUTFRONT/



CLICK TO JUMP TO SECTION

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Consumer Trends

- The incoming Trump administration will be **greeted by economic optimism**.
- Feeling **vulnerable to extreme weather**, consumers expect brands to step up.
- **Store brands** help us stick to inflation-battered budgets.
- Consumers' **mistrust of AI** limits scope to low-stakes, high-effort tasks.
- Millions more are **returning to office** and riding transit.



Media Trends

- “Brain rot,” click fraud, and risky content **dull digital’s impact**.
- Social media, influencers drive **both product discovery and conversion**.
- **High-attention media** gains recognition for its superior value and performance.
- **Multitasking damages impression quality** across TV and digital.
- **Contextual relevance** and a focus on people enhance emotional response.



Out of Home Trends

- OOH earns high enough attention levels to drive **recall, consideration, & intent**.
- **DOOH gets more attention**, higher neuro response, most activation
- **Dynamic and spatial DOOH** lift attention, engagement metrics.
- **Social elements** including influencers & iconic locations **drive engagement**.
- Traditional billboard formats **support carbon emission reduction** goals.



CONSUMER TRENDS

2025 ADVERTISING TRENDS REPORT



CONSUMER TRENDS

As the Trump administration returns, there is reason for economic optimism.

Polarizing as he may be, Donald Trump's election was met with record highs across all three major stock market indices¹. The incoming administration will inherit an economy on the mend, with **real growth projected at 2.0%** this year alongside **inflation slowing to 2.3%**².

With the Fed expected to loosen its funds target rate by 25 to 50 basis points this year³, consumers should have a little more breathing room, especially when it comes to home and auto purchases.

Any change in policy creates winners and losers, and businesses should be alert for the opportunities that emerge. For example, tariffs can create an opening for domestic competitors to increase their market share.

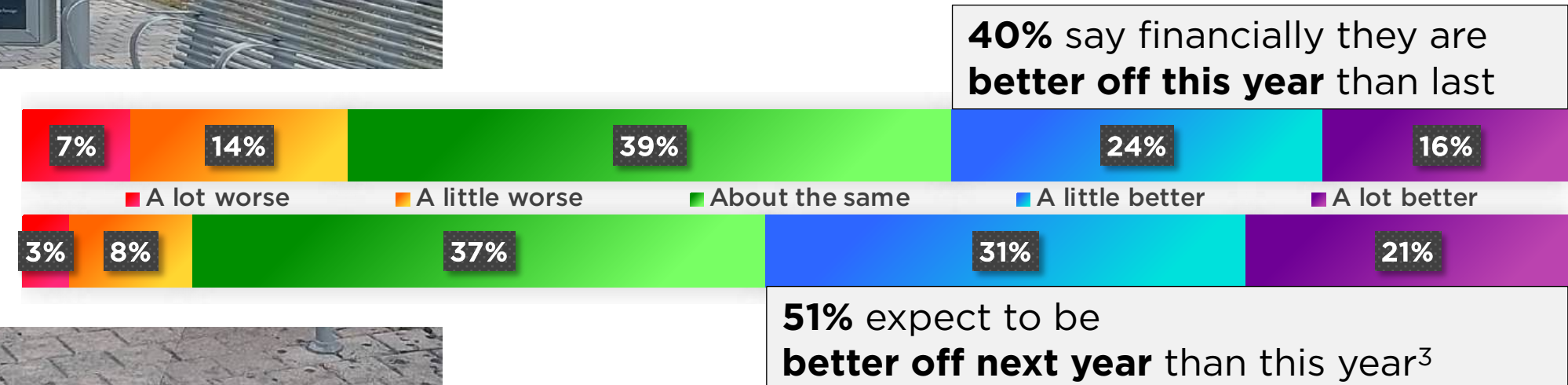




CONSUMER TRENDS

Despite the high cost of living, our finances are improving.

While consumers are still stinging from the cumulative effect of 17% inflation over the past two years¹, people are starting to **feel better about their own current economic situations** and **optimistic about their financial futures**. Maybe that's why we spent a record \$13.3B on the latest Cyber Monday².



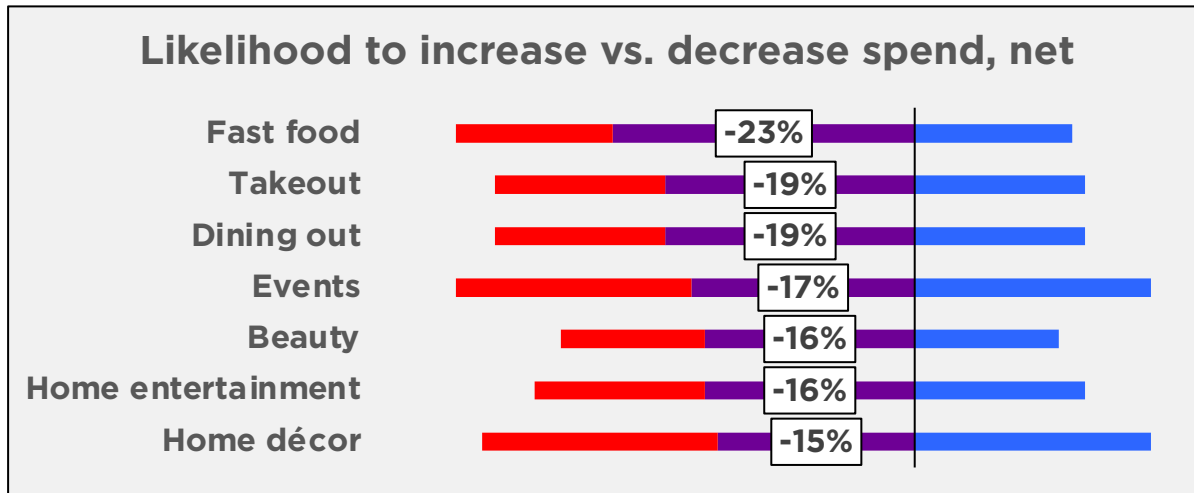
SOURCES: 1. [NIELSENIQ](#), SEP. 2024; 2. [ADOBE ANALYTICS](#), DEC. 2024; 3. [MINTEL](#), OCT. 2024



CONSUMER TRENDS

However, the continued high cost of living has meant **making some difficult choices.**

Every category has seen more consumers planning to cut back spending than to increase it. But some categories have been impacted more than others.





CONSUMER TRENDS

One way we're adjusting is by embracing store brands.

From Amazon to Walmart, store brands – also known as **private labels** – are earning a greater share of wallet by providing **quality products at reasonable prices**. In fact, for ALDI and Trader Joe's, that share of wallet is more than two thirds¹.



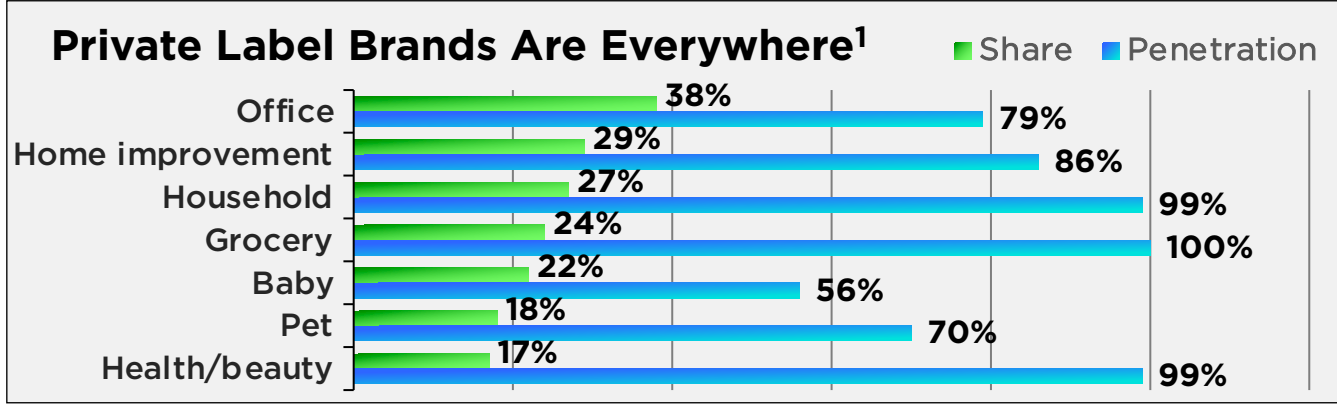
plan to buy more private label brands



say buying private brands makes them feel like a smart shopper



choose a retailer specifically for its private label brands²



SOURCES: 1. [NUMERATOR](#), NOV. 2024; 2. [MINTEL](#), NOV. 2024



CONSUMER TRENDS

Amid all the chaos, consumers seek sanctuary in wellness.

Wellness-focused U.S. consumers (about two thirds of us) represent over a trillion dollars in spending power¹.

What matters more, a nation's GDP or the well-being of its citizens? Even in a society as consumer-centric as the U.S., 73% say it's the latter². Perhaps because self-improvement is easier than macro-level changes, **51% say their life is headed in the right direction**, versus just 30% who say the same about the country³.

Consumers Willing to Spend on Well-Being⁴



SOURCES: 1. [CIRCANA](#), SEP. 2024; 2. [DENTSU](#), JULY 2024; 3. [YUOVOV](#), NOV. 2024



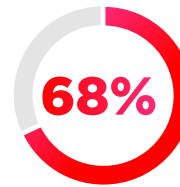


CONSUMER TRENDS

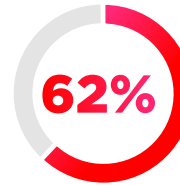
Loyalty is on the decline, but loyalty program usage is up.

Overall consumer loyalty fell ten points this year. However, one in four plan to use loyalty programs more.

High prices aren't the only catalyst for desertion: bad experiences and low quality have each caused a majority to switch from a once-favored brand¹.



68% will pay more to shop brands they are loyal to



62% say their favorite brand treats them like an individual²

LOYALTY DRIVERS

- High quality product (56%)
- Brand longevity (43%)
- Political neutrality (27%)
- Being iconic (24%)
- Memorable experience (20%)

LOYALTY DAMAGERS

- Increasing prices (45%)
- Drop in quality (42%)
- Poor customer service (42%)
- Irresponsible with data (31%)
- False advertising (30%)¹



CONSUMER TRENDS

To avoid inertia, brands must become distinctive and resonant.

Brand inertia might look like loyalty, but it's really habit.

Just because a customer comes back doesn't make them loyal. Nearly two thirds default to their go-to brands without considering alternatives, and 43% will even overlook dissatisfaction out of habit.

We're going through the motions because we're alienated from too many of the businesses we frequent. 56% of consumers can't name a single brand we feel connected to, and only 26% can think of a piece of branded content they've emotionally connected with recently¹.

How can brands create an emotional connection with consumers?

- 84% are interested in **brand messages with offers**.
- 79% will engage with a **personalized email**².
- 64% will engage with a **brand that stands for something**.
- 53% love discovering **brands showing up in unexpected places**.
- Price is an important loyalty driver, but nothing matters more than **delivering a superior experience**³.

SOURCES: 1. [GRAYLING](#), JAN. 2024; 2. [MARIGOLD](#), MAR. 2024 ; 3. [MEDALLIA](#), NOV. 2024

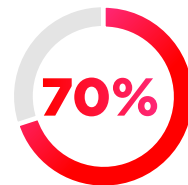


CONSUMER TRENDS

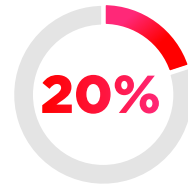
The purpose paradox: **values matter to consumers, but we don't all share the same ones.**

Standing for something appeals to consumers as long as it aligns with what *they* stand for. Culture war is a real brand safety risk.

To wit: 41% say they're **less inclined to buy from a brand** due to its stance on an issue. Seventeen percent say no cause would positively influence their relationship with a brand² and 23% have already dumped a brand over its politics (+4% YOY)³.



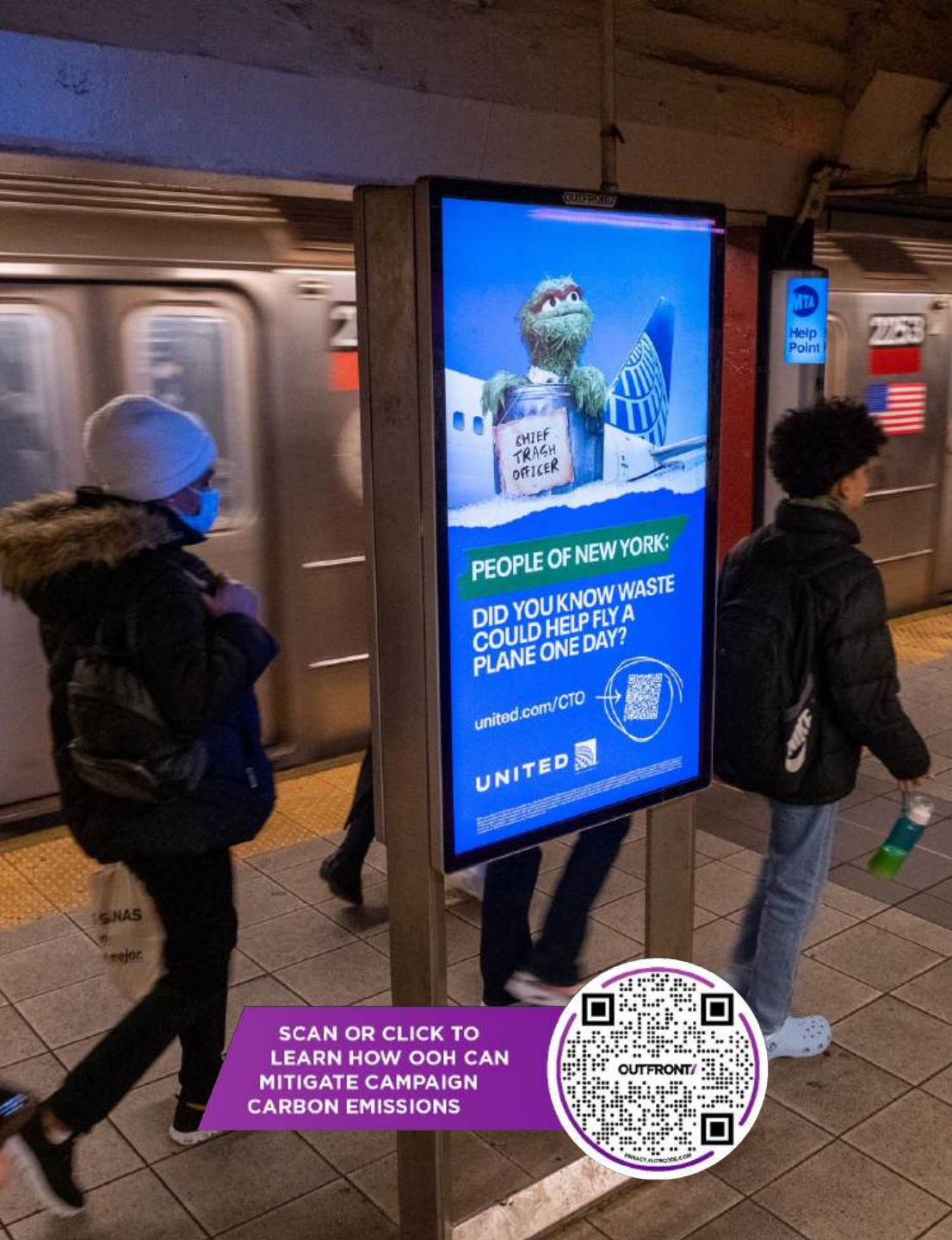
tend to buy brands that reflect our personal values



prioritize a brand's values over its prices¹

Navigating these treacherous waters successfully requires audience knowledge and clear-eyed risk assessment.





CONSUMER TRENDS

As extreme weather worsens, sustainability becomes higher priority and higher premium.

One value now stands out from the rest: sustainability. Consumers now see it as a collective responsibility shared with business.

More than three quarters recognize the impact we can make in our own lifestyles¹. As a result, consumers are **more willing than ever to pay a premium** for sustainable products, increasing from 35% to 53% in the past two years. That willingness is greatest in CPG (59%), auto (57%), and home construction (55%)².

However, we're realizing that individual decisions alone are not enough. That's why 69% of Americans say that **large businesses need to do more** about climate change³.

SOURCE: 1. [SIMON-KUCHER](#), JUL. 2024; 2. [BAIN](#), SEP., 2024; 3. [IPSOS](#), DEC. 2024;



CONSUMER TRENDS

Before & after disaster, brands & businesses should be there.

Climate change isn't some distant threat, it's here now. 2023 saw a record 28 billion-dollar weather events worldwide, causing \$380 billion in damage. That's more than triple the annual average since 1980¹. (24 more hit in 2024.)

A shocking **seven in ten Americans experienced extreme weather** such as severe storms, floods, heatwaves, droughts, wildfires, or rising seas in the past year². Two thirds expect extreme weather to worsen; 43% fear regions may become unlivable as a result. And while this remains a partisan issue, lived experience has led even a majority of Republicans to acknowledge the human connection to climate change.

Why should brands and businesses take note?

After extreme weather hits a community, **consumers expect companies to take action** (68%)³. In these moments, brands that step up can opportunity to create emotional resonance. However, local businesses that the disaster-stricken depend on after the fact shouldn't wait for one to **create their connection with the community**.

SOURCES: 1. [CLIMATE.GOV](#), JAN. 2024; 2. [PEW RESEARCH CENTER](#), JULY 2024; 3. [GARTNER](#), JAN. 2024



SCAN OR CLICK TO
LEARN HOW WE HELPED
FLORIDA CRISIS CENTER
AFTER HURRICANES HIT



CONSUMER TRENDS

Carpe diem: we're breaking event attendance records.

Two out of three Americans say they live for today because the future is uncertain¹; 57% say they're more likely to spend on bucket list experiences².

What's the antidote to doomerism? Doing things! Live Nation had its "most active summer concert season ever" and is sitting on its biggest-ever concert pipeline³. In fact, events of all kinds broke records. Here are some of 2024's top all-time highs:

- **Major League Soccer:** 11 million, leaguewide⁴
- **WNBA:** 2,353,735, leaguewide (+48% YOY)⁵
- **U.S. Open:** 1,048,669, New York City⁶
- **NFL Draft:** 775,000, Detroit⁷
- **Electric Daisy Carnival:** 525,000, Las Vegas⁸
- **Bourbon & Beyond Music Festival:** 210,000, Louisville⁹

SOURCE: 1., [IPSOS](#), SEP. 2024; 2. [VML](#), SEP. 2024; 3. [LIVE NATION](#), NOV. 2024; 4. [MLS](#), OCT. 2024; 5. [WNBA](#), SEP. 2024; 6. [SPORTS BUSINESS JOURNAL](#), SEP. 2024; 7. [SPORTS BUSINESS JOURNAL](#), APR. 2024; 8. [DIGITAL MUSIC NEWS](#), MAY 2024; 9. [MUSIC ROW](#), SEP. 2024



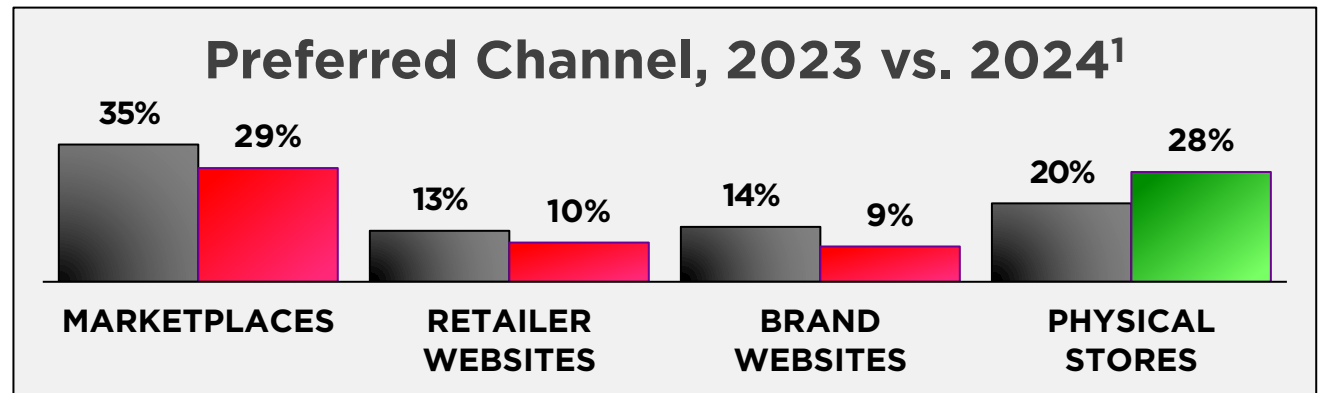


CONSUMER TRENDS

Brick-and-mortar is so back.

Last year worldwide, every e-commerce channel lost most-preferred status in favor of physical stores¹ and the instant gratification they provide.

E-commerce obviously isn't going anywhere. In fact, Shopify projects a \$470B increase this year². But we're **rediscovering the joy of shopping IRL**. More than 1 in 3 say they're doing more in-store shopping than last year³. And 64% of Gen Z, the first digitally native generation, prefer it to online shopping⁴.



SOURCES: 1. [VML](#), SEP. 2024; 2. [SHOPIFY](#), OCT. 2024; 3. [ACCENTURE](#), OCT. 2024; 4. [LEK](#), JAN. 2024



CONSUMER TRENDS

Though digitally native, Gen Z is choosing the physical over the digital.

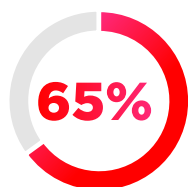
It seems counter-intuitive, but Gen Z is more interested in actual objects in real places than the digital world.

2024 marked the 18th straight year of sales growth for vinyl LPs¹, thanks in part to the 36% of Gen Z who prefer records over digital formats.

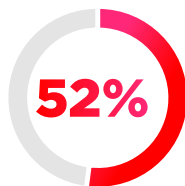
But the phenomenon is bigger than just a twelve-inch. Here are a few other ways Gen Z is kicking it old-school:



88% are cinemagoers, seeing an average of six films per year



65% prefer shopping in-store over shopping online



52% are actively trying to reduce their screen time



50% of Gen Z men prefer watching DVDs over streaming video²

SOURCES: 1, [DISCOGS](#), OCT. 2024; 2, [APPINIO/POSTERSCOPE](#), NOV. 2023





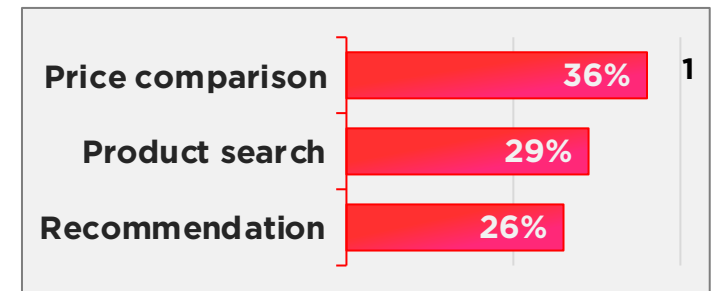
CONSUMER TRENDS

The strongest AI use cases right now **save time & money.**

Would you take an AI product recommendation? Use artificial intelligence to automate everyday shopping decisions? Two in five say yes¹.

Consumers now are most receptive to AI use cases that streamline searching.

One category of particular note in this regard: travel. Considering that a third of travelers use 10+ trip planning sites and twice as many are dissatisfied with the overall experience, it's no wonder around two thirds **would let an AI agent book their flights or hotel².**



What don't consumers want artificial intelligence involved in? Entertainment. Less than a quarter are interested in AI-made music, television, or movies³ and two in three say AI art diminishes the beauty of the real thing⁴.

SOURCES: 1. [NIELSEN/Q/GFK](#), SEP. 2024; 2. [EMARKETER](#), DEC. 2024; 3. [MINTEL](#), DEC. 2024; 4. [GETTY IMAGES](#), DEC. 2024;



CONSUMER TRENDS

But to achieve mass adoption, AI must address trust issues.

Four in ten Americans are concerned about artificial intelligence ending humanity. That might be over the top but let's not mince words: AI has an image problem.



trust AI to make unbiased decisions



trust AI to make ethical decisions

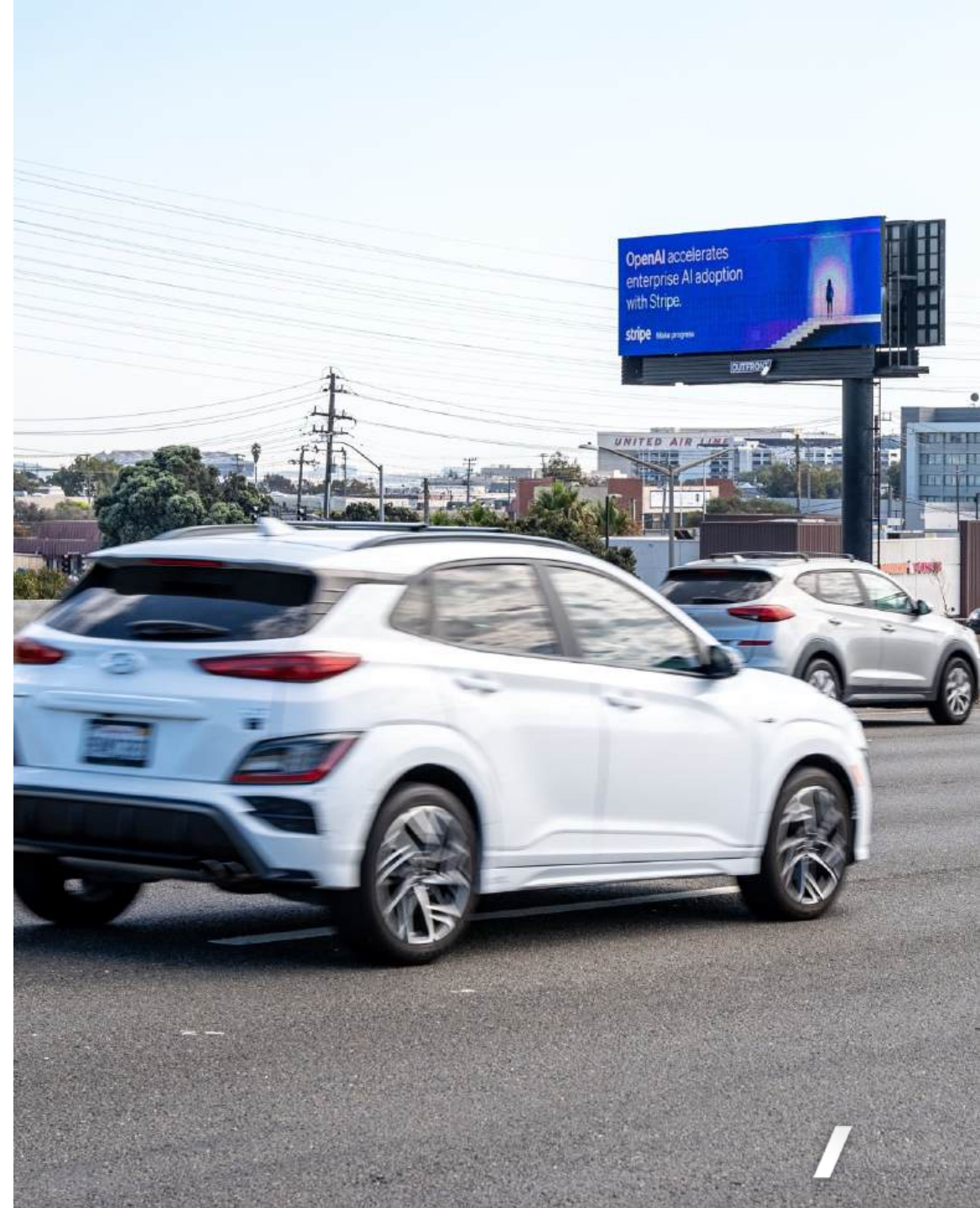


trust AI to provide accurate information¹

A couple of data points demonstrating consumers' ambivalence to AI: two out of three would wait to speak to a human instead of using a chatbot, and only 18% feel comfortable sharing personal details with an AI system².

Even among early adopters, **trust remains an issue**: only half as many would trust AI with financial transactions, medical diagnoses, or legal advice than with comparatively low-stakes tasks like product recommendations³.

SOURCES: 1. [YUOGOV](#), APR. 2024; 2. [NIELSENIQ/GFK](#), SEP. 2024; 3. [PWC](#), MAY 2024

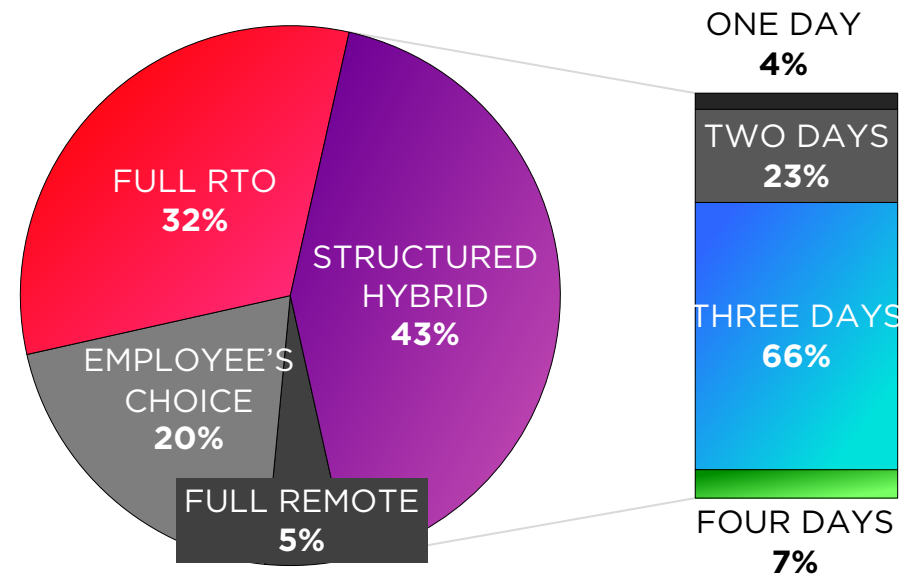




CONSUMER TRENDS

RTO: Most employers now require **three or more days in the office weekly.**

Amazon and Dell are among the latest companies to implement full return-to-office policies, and with a potential post-inaugural mandate affecting the entire Federal workforce, the stall in the RTO trend may be over.



SOURCE: [FLEX INDEX](#), DEC. 2024



CONSUMER TRENDS

From coast to coast, transit ridership is trending upwards.

New York City's MTA just celebrated its **busiest day of subway ridership in nearly five years**, moving **4,497,599** passengers on December 12¹. Eight of our transit partners have grown at a double-digit pace through Q3 of 2024²!

City (Agency)	Modality	Trips	Q1-Q3, YOY
San Francisco (Caltrain)	Commuter Rail	5.2M	+29.3%
Washington, DC (WMATA)	Heavy Rail	125.5M	+26.5%
Boston (MBTA)	Commuter Rail	7.9M	+20.0%
San Francisco (Muni)	Light Rail	21.6M	+19.1%
Detroit (DoT)	Bus	9.5M	+18.1%
Washington, DC (WMATA)	Bus	92M	+13.6%
New York (Metro-North)	Commuter Rail	49.6M	+12.5%
Miami (Miami-Dade Transit)	Heavy Rail	11.2M	+10.7%
Chicago (Metra)	Commuter Rail	26.2M	+10.6%

SOURCES: 1. [MTA](#), DEC. 2024; 2. [APTA](#), NOV. 2024





AM GEAR HOME FOR ALL YOUR FAVORITE
NYC 51ST & 6TH AVE MLB NY

Southbound
Use 7 Ave
←
Best Route

PEDESTRIAN FLOW ZONE
← KEEP MOVING

Olive Garden

SABRETT
BURGER

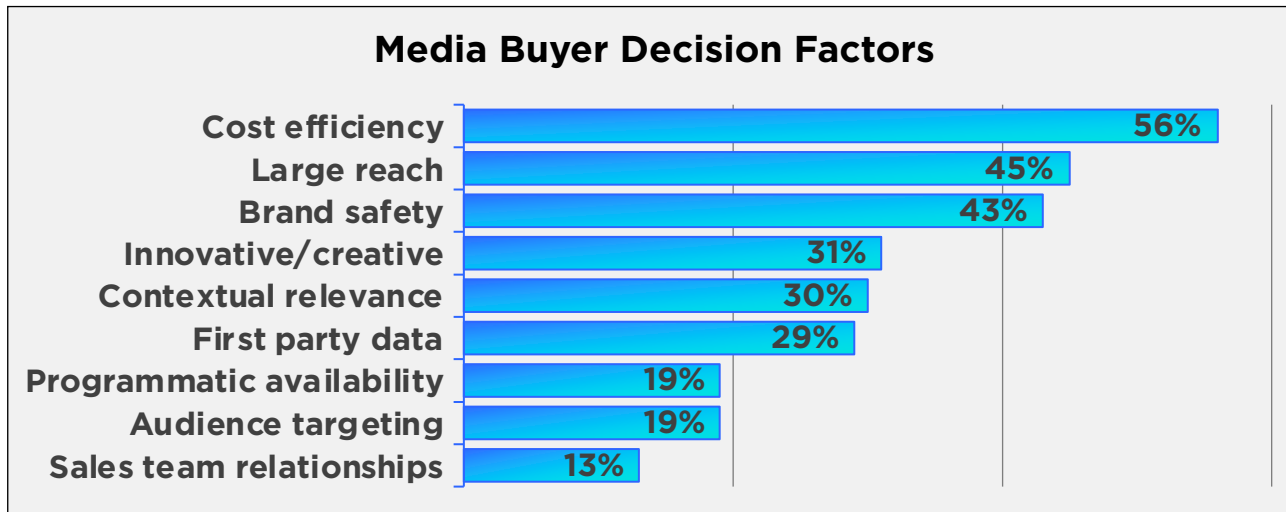
MEDIA TRENDS

2025 ADVERTISING TRENDS REPORT

MEDIA TRENDS

Media buyers' top priorities are efficiency, reach, & brand safety.

A hierarchy of needs informs the media buying decisions of agencies and brand marketers.



Agencies were more likely to prioritize cost efficiency and innovation, while marketers placed greater importance on brand safety, contextual relevance, audience targeting, and programmatic availability.

SOURCE: [MYERS REPORT](#), DEC. 2024



SCAN OR CLICK TO FIND OUT WHY OUTFRONT IS "AN INDUSTRY LEADER ACROSS METRICS"



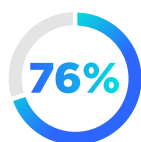


CONSUMER TRENDS

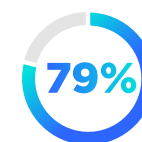
Sometimes the abyss gazes back: the word of the year is “brain rot.”

Oxford University Press defines brain rot as “deterioration of a person’s mental or intellectual state, especially viewed as the result of overconsumption of material (now particularly online content) considered to be trivial or unchallenging.”¹

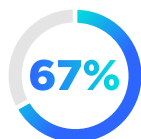
AI slop. Made-for-advertising websites. Addictive algorithms. Unchecked toxicity. And a daily average of 13+ hours of screen time². It’s no wonder 58% of us feel **overwhelmed by technology**³. Even scarier: 60% say technology is causing society to lose touch with reality⁴. This exhaustion has **diminished consumers’ receptiveness to digital ads**: even in less-controversial channels like email, a full half of consumers want to receive fewer marketing messages⁵.



76% would stop visiting a website if too many ads interfered



79% will skip digital ads when given the option



67% don't even notice digital ads because there are so many



52% would pay for an ad blocker⁵

SOURCES: 1. [OXFORD UNIVERSITY PRESS](#), DEC. 2024; 2. [SOAX](#), OCT. 2024; 3. [VML](#), SEP. 2024; 4. [KANTAR](#), DEC. 2024; 5. [OPTIMOVE](#), APR. 2024; 6. [MINTEL](#), NOV. 2024



MEDIA TRENDS

One in five web, mobile, and CTV impressions are fraudulent. Click fraud rates are even worse.

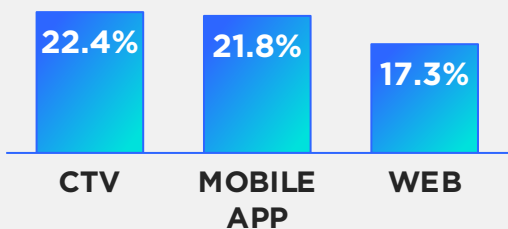
Digital advertising fraud wasted 26% of total global spend in 2024¹, costing an eye-watering \$108 billion. In 2025, that number could be as high as \$122 billion².

Fraud-free impressions have a conversion rate

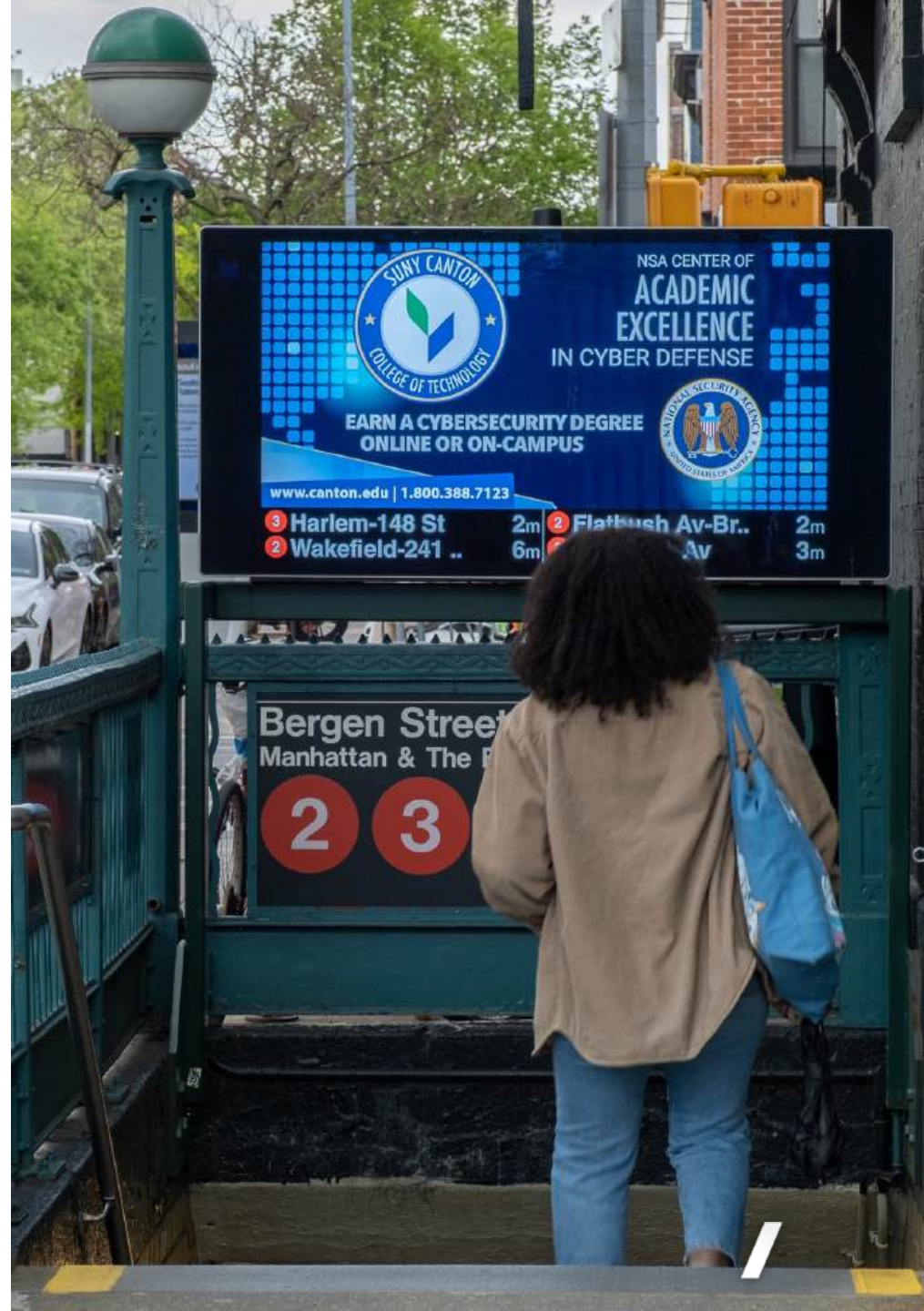
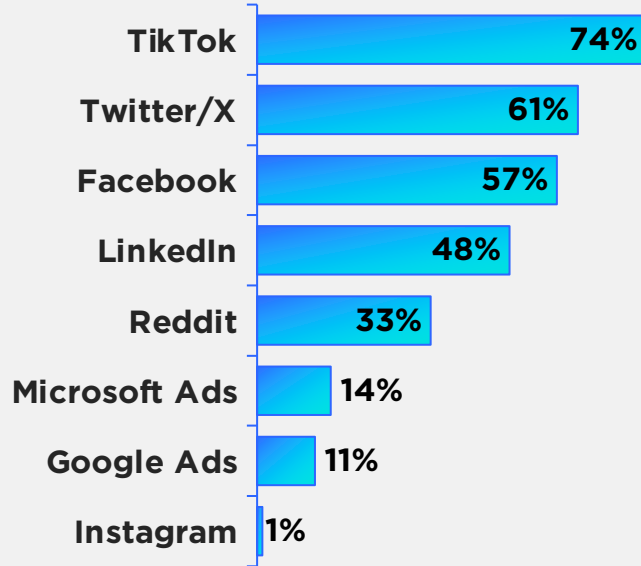
363%

higher than those that are not fraud-free³

Invalid Traffic by Channel⁴



Click Fraud Rates⁵



SOURCE: 1. TRAFFICGUARD, 2. PIXALATE, DEC. 2024; 2. VPNRANKS, DEC. 2024; 3. IAS, NOV. 2022; 4. PIXALATE, DEC. 2024; 5. WD STRATEGIES, NOV. 2024



MEDIA TRENDS

Brand safety and media suitability are critically important for buyers.

Brand suitability is the #1 media quality priority¹, and for good reason: consumers will punish advertisers in its absence.

If you're a media buyer, there are lots of shady corners of the internet where you don't want your ads to show up. Concerns are highest for adjacency to misinformation (31%), MFA content (25%), and deepfakes (24%)¹.

If you're a consumer, encountering brands in an **unsafe context reduces likelihood of purchase** (56%) and **increases unfavorable feelings** about the advertiser (43%).

Brand-safe impressions have a conversion rate

233%

higher than those that are not brand-safe³

SOURCE: 1. IAS, NOV. 2024; 2. IAS, AUG. 2024; 3. IAS, MAR. 2022





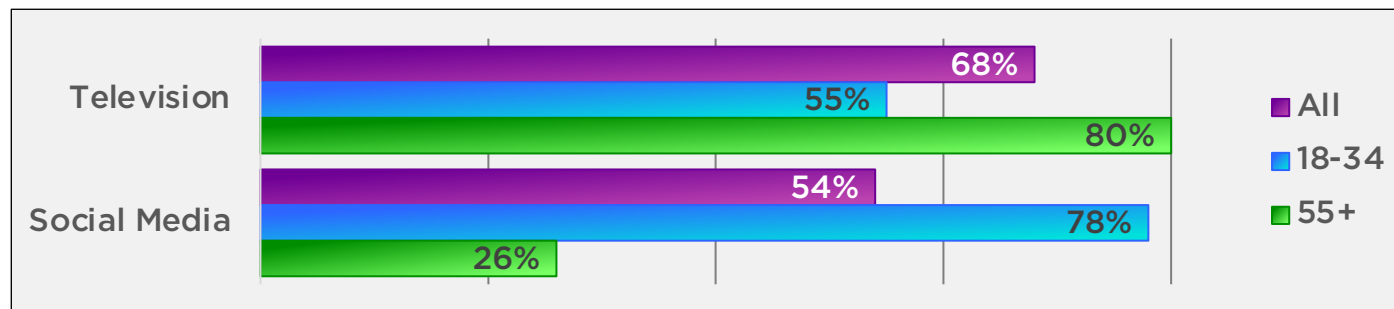
CONSUMER TRENDS

The shift from traditional TV to social video **has hit a tipping point.**

Our consumption habits have changed. More people now use social media daily than watch television. And more than half of consumers use their smartphone as their primary screen¹.

The average adult watches 4h49m of video daily, during which they see 17 minutes of advertising². And while YouTube viewers now outnumber those who watch linear TV³, **YouTube is much more saturated with advertising**, its 15.4% share of view time containing 27.5% of the total ads.

The shift is most visible **where different generations get their news¹:**



MEDIA TRENDS

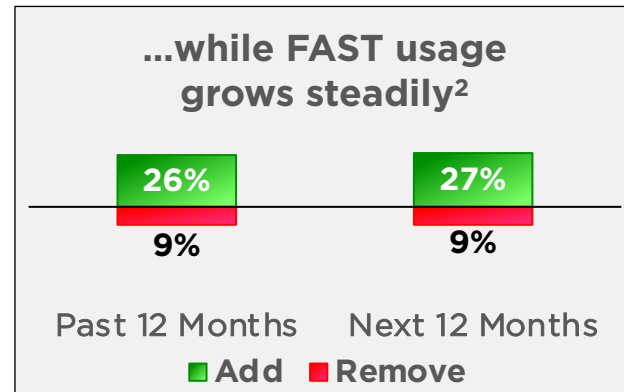
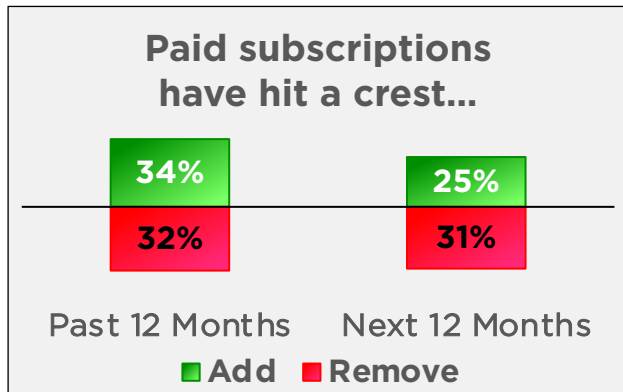
While paid streaming plateaus, free ad-supported TV grows.

Rising prices, serial churning, and fragmentation have made it more challenging to reach streaming video audiences.

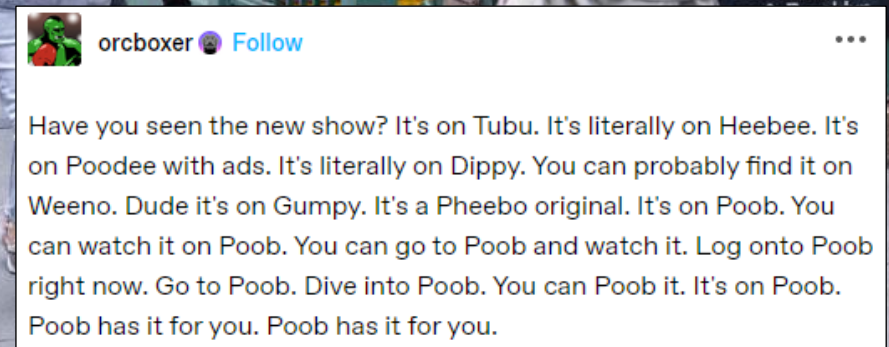
Is streaming saturated? Q1 '24 saw record-high SVOD (subscription video on demand) cancellations (50.4M) and a 42% drop in net adds¹.

63% of consumers now are “serial churners” who subscribe to a service to watch something specific and then cancel. For 52%, cost is what’s behind cycling, up 14 points YOY².

One unequivocal bright spot for SVODs: their share of sports viewing hours has increased from 31% to 54% in the past two years³.



SOURCES: 1. ANTENNA, SEP. 2024; 2. LG AD SOLUTIONS, APR. 2024; 3. ROKU, DEC. 2024





MEDIA TRENDS

AI's rapid impact on search has big implications for brands.

Google used to be the gateway to the open web. Now, like every other platform, it's optimized to keep you on Google.

Google implemented AI Overviews in its search results in May 2024; now **almost six out of ten searches end without a click** and nearly three in ten clicks lead to another Google site¹. What was once a doorway is now a dead end, one increasingly populated by low-quality content, MFA affiliate sites, and spam².

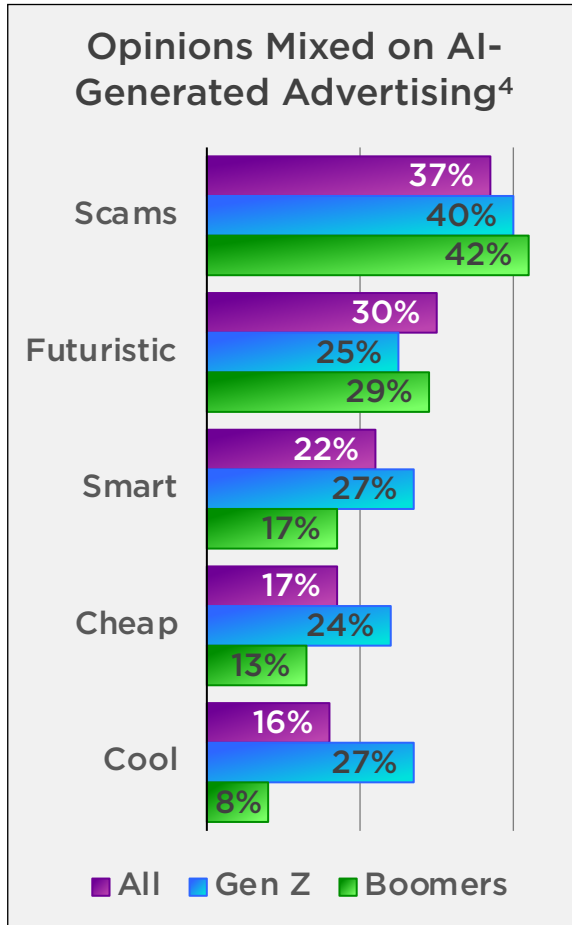
The lines are blurring, with 44% of consumers viewing AI and search as interchangeable and two thirds of current users **predicting that AI tools like Perplexity will replace search within three years**³. Compounding the blur, OpenAI just rolled out its own search engine in December. Even before that, ChatGPT took six points of market share from Google in six months⁴.

As the always-volatile disciple of search becomes even more unreliable, **brands should reconsider how to fuel the funnel.**

SOURCES: 1. [SPARKTORO](#), JULY 2024; 2. [LEIPZIG UNIVERSITY ET AL.](#), JAN. 2024; 3. [LOCAL DIALOG](#), DEC. 2024; 4. [EVERCÖRE ISI](#), SEP. 2024



Use of artificial intelligence in advertising is controversial.



Artificial intelligence is polarizing for both marketers and consumers. Brands must approach the use of AI in ads mindfully.

While 68% of marketers are generally favorable on AI¹, more than half believe it's overhyped and nearly 90% say it poses **moderate to significant brand safety risk**². They might be right: 43% say they don't trust AI-generated ads.

Content generation isn't marketers' top AI use case though; **behavior-driven personalized recommendations and predictive analytics** each placed six points higher³.





SCAN OR CLICK TO READ
ABOUT HOW STUDIOS
HELPED A YOUTUBE
STAR LAUNCH A CANDY



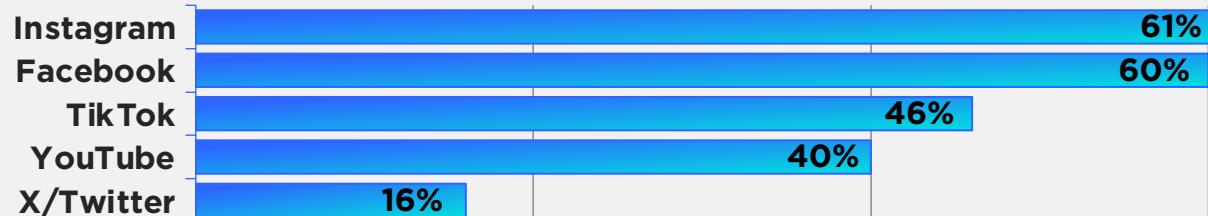
MEDIA TRENDS

As e-commerce product discovery loses effectiveness, consumers lean into social for inspiration.

Finding what you're looking for while shopping online has also grown more challenging. In fact, for product discovery, 42% of consumers now give ecommerce websites a grade of C or worse¹.

Frustrated consumers now turn to social media for product discovery. 46% use social as their primary product discovery source; 43% search social before using Google². Take TikTok, where 62% say product reviews and recommendations are a major reason why they use it. That rises to 68% for women and 74% for those under 30³.

Top Platforms for Product Discovery⁴



SOURCES: 1. [CONSTRUCTOR](#), SEP. 2024; 2. [ACTIVATE CONSULTING](#), DEC. 2024;
3. [PEW RESEARCH GROUP](#), NOV. 2024; 4. [SPROUT SOCIAL](#), OCT. 2024





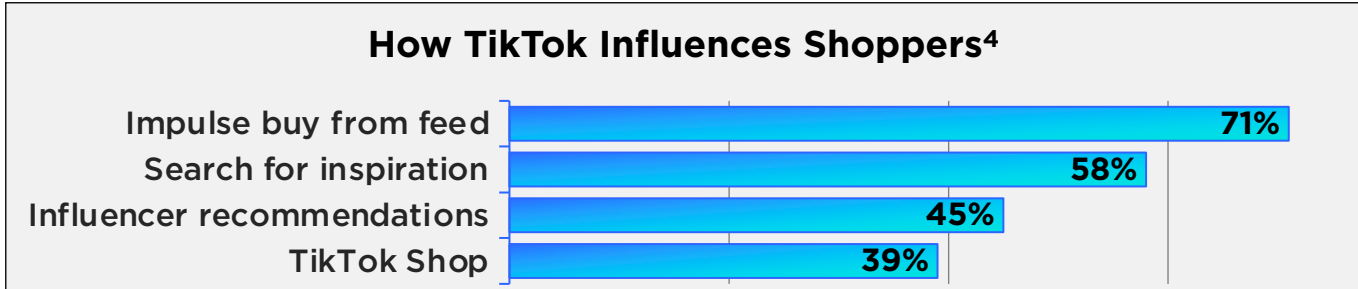
MEDIA TRENDS

Led by beauty and fashion content creators, social commerce growth is projected to continue.

78% of media experts expect continued momentum for social commerce; 70% say the importance of influencers within an s-com strategy will grow as well¹.

Social commerce drove over \$90B in sales in 2024, 70% concentrated in the fashion and beauty verticals².

Influencers – aka content creators – can impact the full buyer’s journey and customer lifecycle. Half of all consumers would seek a new product that they saw on social media and over three in ten **would change brands based on creator content**, including 44% of Gen Z and 40% of Millennials³.



SOURCE: 1. [IAS](#), NOV. 2024; 2. [FORBES](#), OCT. 2024; 3. [NIELSEN IQ](#), SEP. 2024, 4. [NIELSEN IQ](#), SEP. 2024



MEDIA TRENDS

However, consumers are wary about inauthentic partnerships.

Authenticity is of near-unanimous importance to consumers, making alignment between brand, creator, and audience critical to the success of influencer partnerships¹.

Nearly two out of three consider paid partnerships on social media to be inauthentic². But what is authenticity, anyway? Consumers most commonly defined it as consistency (56%) and honesty (43%).

One key is **allowing creators to speak in their own voices**. Tightly scripting how a brand's partners promote it ultimately weakens both the relationship with the influencer and the strength of the influence³.

These partnerships are essentially a transfer of the creator's credibility to the endorsed brand. If the creator isn't plausibly someone who would use it, they don't possess the credibility to transfer! That's why alignment is so important to a successful collaboration.

But **that alignment need not be universal**. ROI for influencer campaigns is optimized when just 9% of their followers have matching interests⁴.





MEDIA TRENDS

Multitasking creates more hours in the day, but at a cost.

By stacking digital tasks like using social media and watching online video with real-life activities, we're cheating the clock.

On average in 2024, we spent 2h23m on social media daily and 13h7m overall with media and technology¹. Where did we find the time? By multitasking, we've been able to effectively cram **32 hours and 9 minutes** into a 24-hour day. The digital activities most likely to be multitasked are use of social media (52%, +7 YOY) and watching videos (49%, +6 YOY)². That means **at any given moment, social media likely only has half of someone's attention**.

Neuroscientists warn us that our brains are not made for multitasking. Numerous studies have shown a **negative impact on recall and memory encoding** as well as increased stress levels³.

How Social Media Users Multitask²



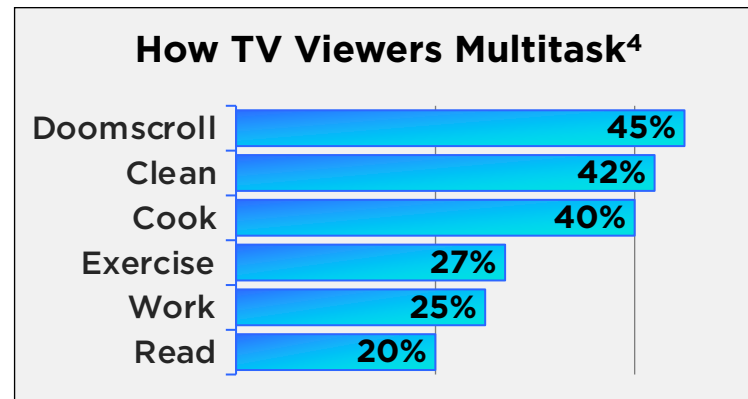
MEDIA TRENDS

Viewability isn't viewed: why TV impression impact is overstated.

93% of TV viewers multitask with other devices. 71% are always holding their phones while watching¹. And there are other reasons that TV advertising isn't reaching audiences.

On average, a 30-second television ad gets 13.8 seconds of attention. But one in four commercials plays out to an empty room. Between that and multitasking, **only 43% of TV ads even get looked at².**

What ad viewership there is, isn't evenly distributed either: 61% of CTV ads go to fewer than 13% of households. Another dirty little secret of CTV: **frequency capping often doesn't work.** That's why programmatic buys can result in the same spot playing far too frequently, sometimes back-to-back, not only reducing impact but annoying the audience³.



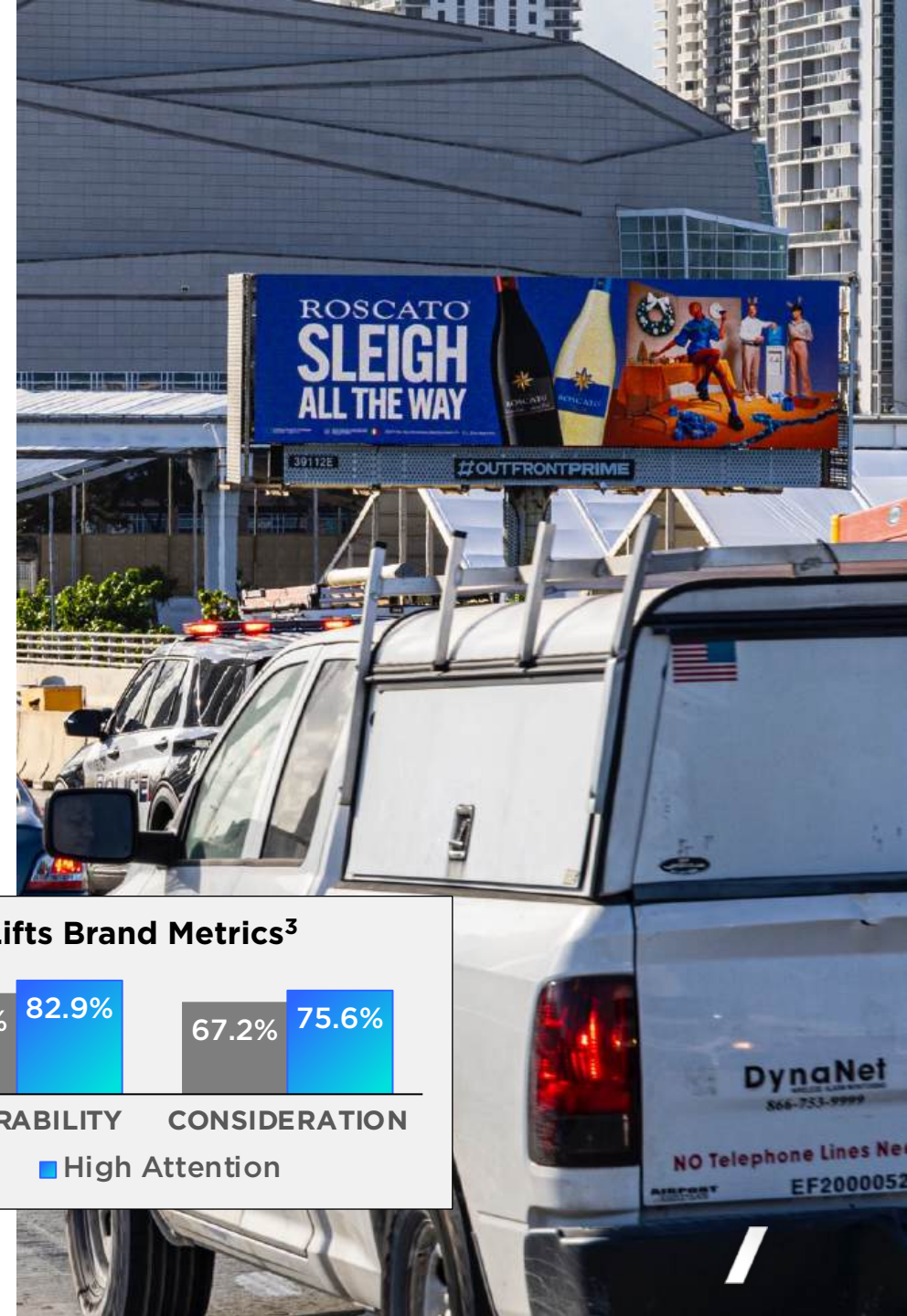
MEDIA TRENDS

Not all impressions are created equally. High-attention media deliver better value & results.

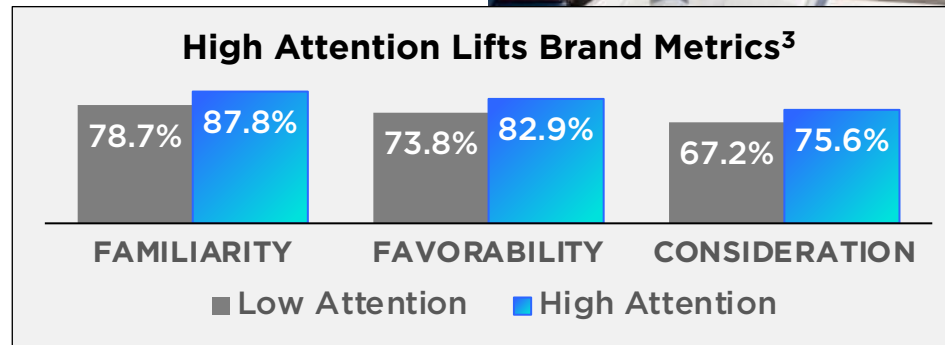
Two and a half seconds. That's how much attention it takes to imprint memory. But fewer than 20% of ads get there¹.

Reaching the attention-memory threshold makes all the difference in an ad's impact, with high-attention media platforms delivering a **65% lift in business effects like profitability and customer acquisition²**. But do you know what doesn't correlate with attention? CPMs³.

Consequences of low-attention media include wasted spend, misattribution leading to competitor uplift, reduced brand recognition and market share, wasted resource allocation, and more difficulty proving ROI⁴.



High Attention Offsets Low Frequency ³		
	High Frequency	Low Frequency
High Attention	37.2%	20.4%
Low Attention	21.3%	14.4%



SOURCES: 1. [AMPLIFIED INTELLIGENCE](#), JUN 2022; 2. [WARC](#), MAY 2023. 3. [HAVAS MEDIA NETWORK/LUMEN](#), SEP. 2024, 4. [AMPLIFIED INTELLIGENCE](#), AUG. 2024;



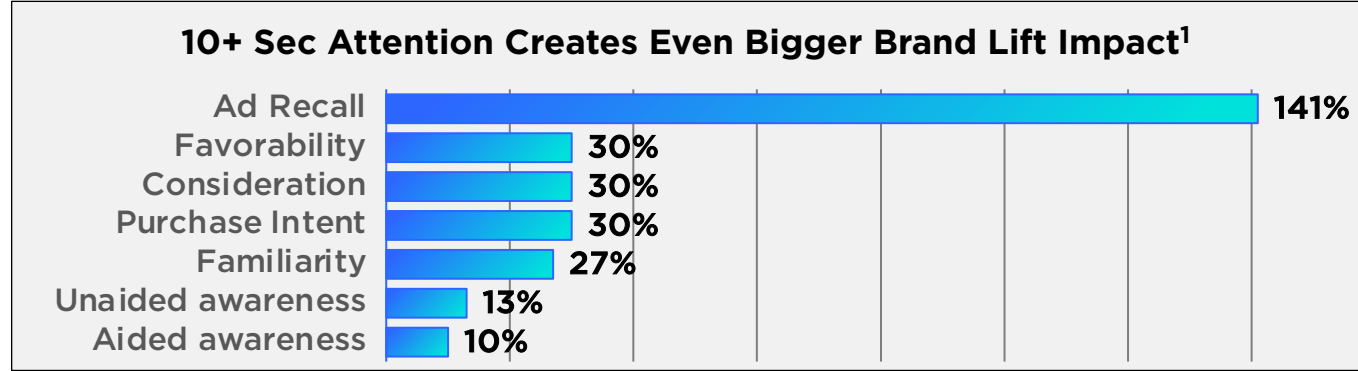
MEDIA TRENDS

Brand lift & beyond: high-attention media boost sales metrics too.

“In the attention economy, every second counts. For brands, serving ad content that can hold a viewer’s attention for longer not only leads to greater engagement, enhanced brand recall and improved trust with the consumer, it also positively affects their bottom line.” — Forbes

High-Attention Media Lifts the Lower Funnel²

- +130%** conversion rates
- +157%** incremental sales
- 51%** cost per conversion



SOURCES: 1. [TEADS/LUMEN](#), JULY 2023; 2. [IAS](#), JULY 2024



Would you like some attention? Try contextual relevance.

“In reality, people’s brand choices do not take place in a vacuum, they are very much influenced by context – what is going on in someone’s life, as well as in the world around them. Indeed, brand choice involves a complex interaction of factors that are influenced by the micro and macro contexts in which decisions take place.” - Ipsos

How important are contextual factors in brand choice? Believe it or not, context accounts for more than half of the decision¹!

Top Contextual Categories by Attention Level²

- Sports
- Politics
- Entertainment
- Travel

KPIs Impacted by Contextual Relevance²

- 4x unaided recall
- 25% more memorable
- 14% purchase intent lift
- 5% favorability lift





MEDIA TRENDS

The key to creative impact is generating emotional response.

The opposite of love isn't hate - it's indifference. But the most common emotional reaction to ads is neutrality. The absence of emotion comes at the cost of happiness and surprise¹.

Ultimately, people want to feel something. That's why **emotional campaigns have 3.5x the impact of rational ones²**. They're 80% better at driving word of mouth and social sharing, 52% better at building mental availability, and 94% better at creating a distinctive image.

Rational advertising still has a role; it's more effective at driving website visitation (+80%) and building product knowledge (+355%).

Most of our decision-making happens on the subconscious level, so **direct focus on the product isn't always the best approach**. Ad creative focused on people instead of product drives 40% more brain response peaks, 40% more long-term memorability, and 15% more personal relevance³.

Empathy A Bigger Sales Driver than Creativity ⁴		
	High Creativity	Low Creativity
High Empathy	+20%	+4%
Low Empathy	-10%	-23%

SOURCE: 1. SYSTEM1 GROUP, JUL. 2024; 2. SYSTEM1 GROUP, SEP. 2024; 3. AUSTRALIAN ADVERTISING EFFECTIVENESS RULES, SEP. 2019; 4. IPSOS, JUNE 2024



SCAN OR CLICK TO READ ABOUT OUR WORK WITH THE NATIONAL DIAPER BANK NETWORK





OUT OF HOME TRENDS

2025 ADVERTISING TRENDS REPORT

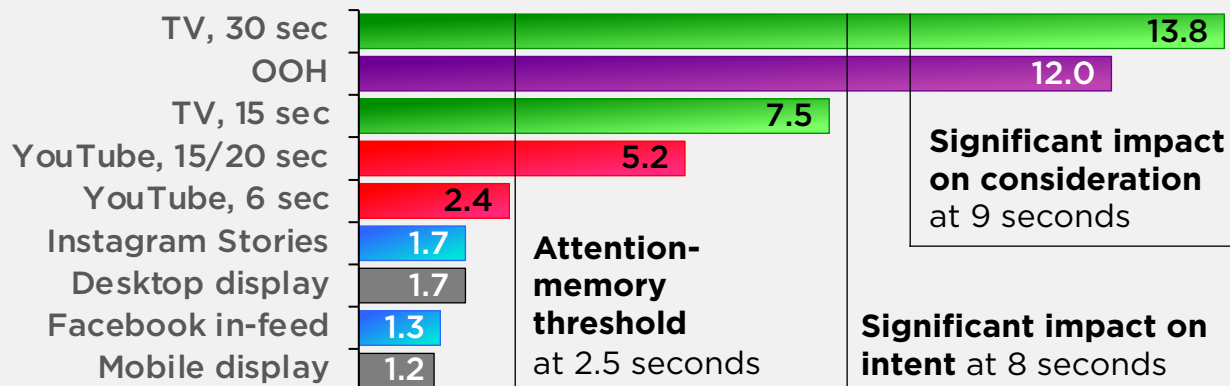
OUT OF HOME TRENDS

Out of home is one of the highest-attention mediums in advertising.

Out of home campaigns command an astonishing **12 seconds of total attention**, nearly 50% more than the average high-attention platform.

Nine out of ten ads cross that crucial 2.5-second attention-memory threshold, making OOH **5.9x more likely to be committed to memory** than digital. This was consistent across 12 formats and 11 categories¹.

OOH's Impactful Eyes-On Dwell Time^{1,2,3}





OUT OF HOME TRENDS

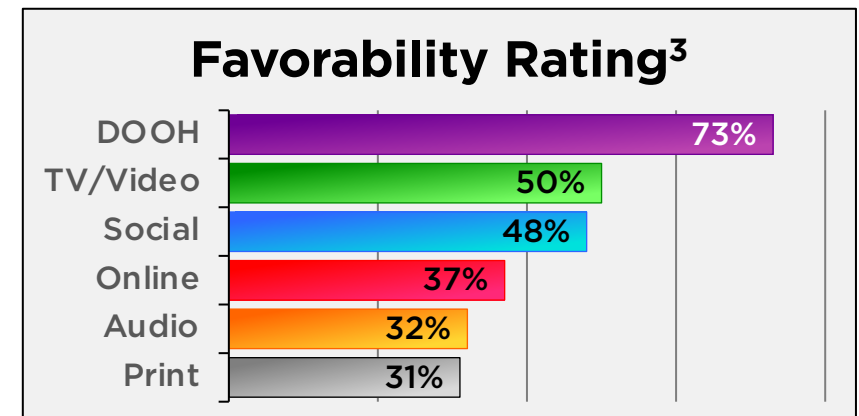
More consumers now pay attention to billboards, especially DOOH.

Consumers are more likely to pay attention to billboards now than two years ago. They're also more likely than to pay attention to billboards than ads on streaming, social, or radio.

The percentage of consumers who say they're likely to pay attention to billboards has **risen seven points since 2022**, more than triple the growth rate of the next-fastest-rising medium.

For even more intense attention, there's digital out of home. **DOOH generates 3.2x the neuro response and memory activity** compared to traditional static canvases².

DOOH is consumers' favorite advertising medium. It's also the most likely to drive action (49%). It's easy to understand why DOOH is the #1 favorite media channel of marketers as well³.



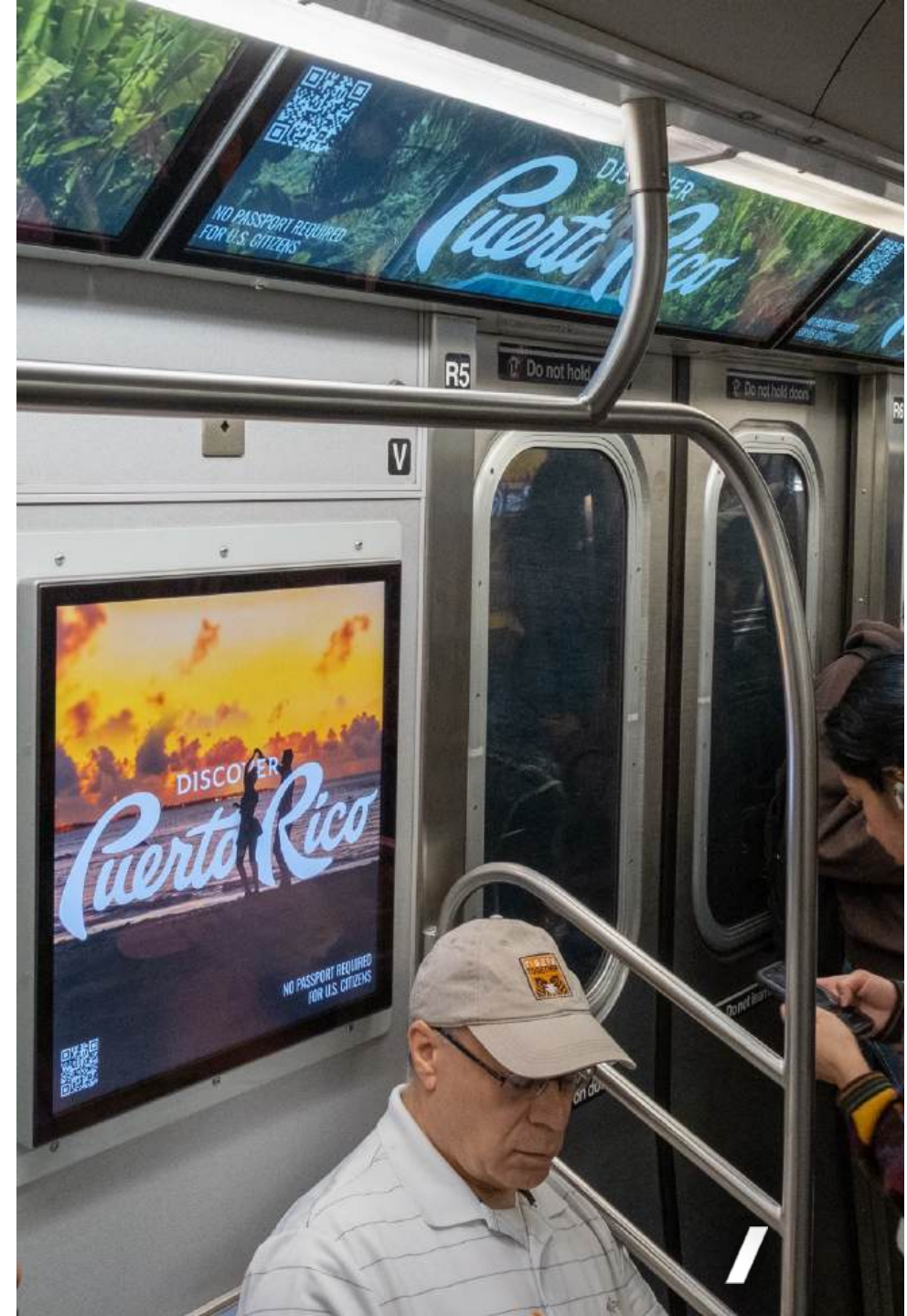
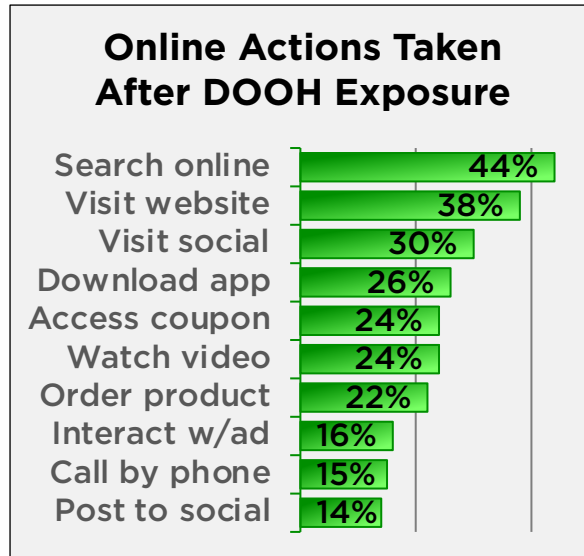
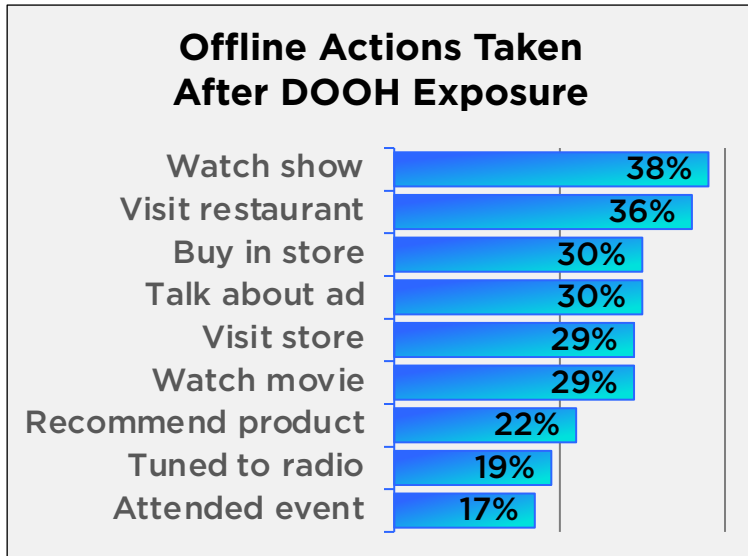
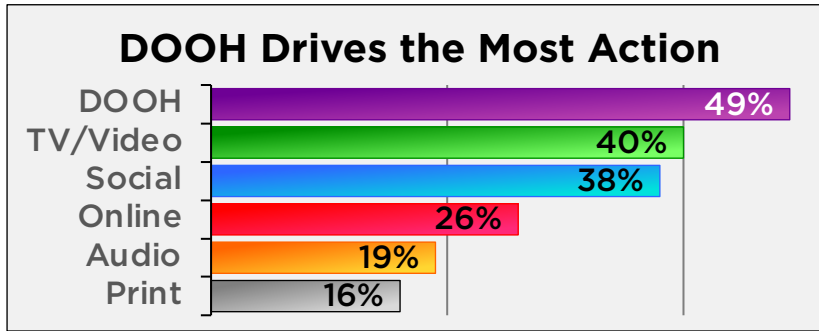
SOURCES: 1. [YOOB](#), DEC. 2024; 2. [WOW MEDIA/NEURO-INSIGHT](#), JAN. 2023; 3. [THE HARRIS POLL/OAAA](#), MAY 2024



OUT OF HOME TRENDS

Digital out of home is the ad format most likely to activate its audience.

Nearly half of consumers say that DOOH is likely to make them take action, including 57% of men and 56% of Gen Z and Millennials.



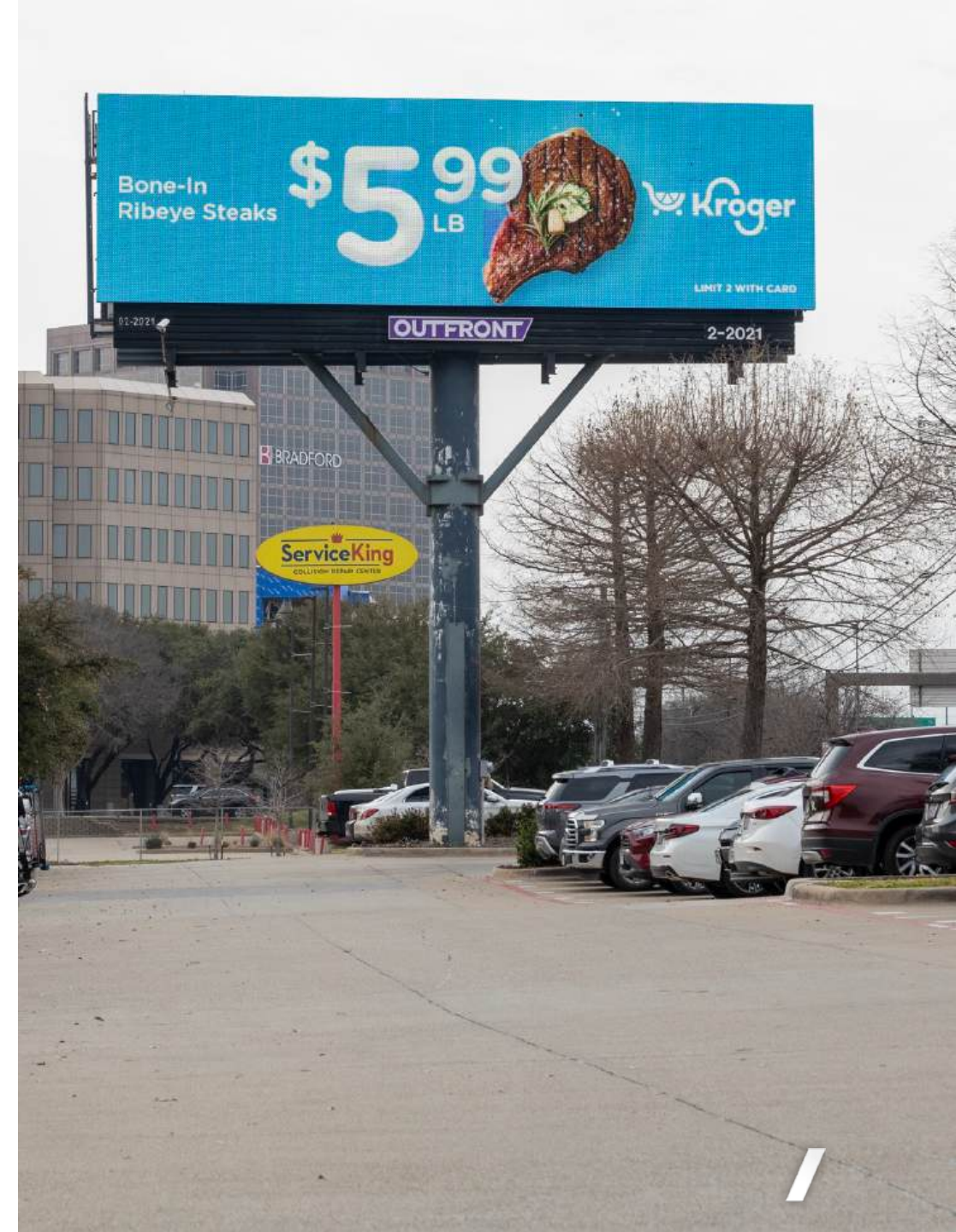
OUT OF HOME TRENDS

Digital out of home impacts the last mile of the buyer's journey.

DOOH formats are particularly effective when audiences encounter them on their way to make a purchase from a brick-and-mortar retail location.

Format	Noticed DOOH with directions	Visited Business after noticing	Made Purchase after visiting
Digital Out of Home	30%	51%	93%
Digital Billboards	62%	78%	54%
Digital Transit	58%	65%	43%
Digital Street-Level	51%	63%	46%
Digital Place-Based	71%	67%	54%

SOURCE: [THE HARRIS POLL/OAAA](#), MAY 2024



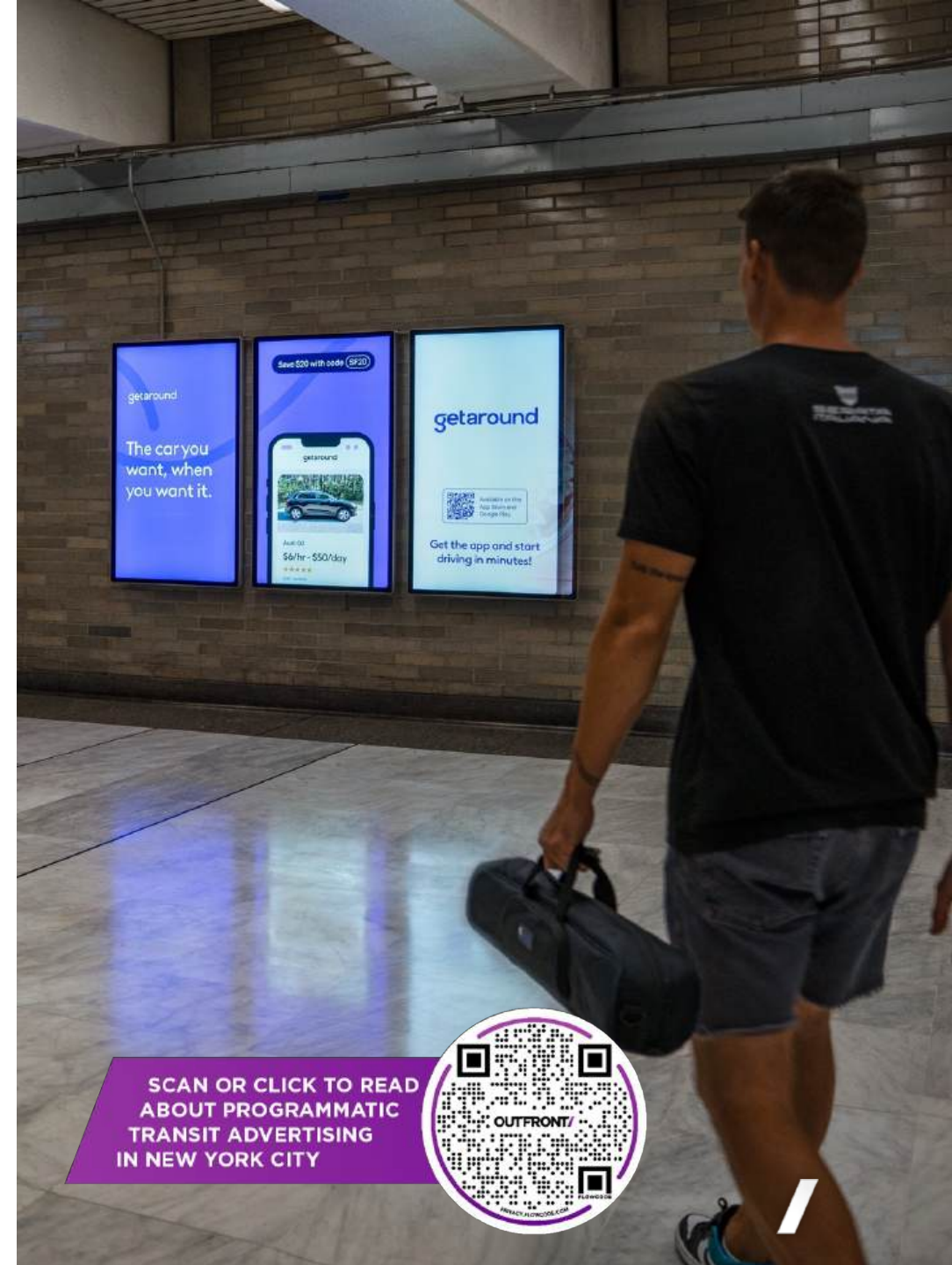
OUT OF HOME TRENDS

Programmatic DOOH offers quality media, reach, frequency, and streamlined buying.

A quarter of 2024 DOOH spend was programmatic; its share could reach a third by 2026. Here are some of the most important storylines in the space.

- **Media quality matters.** As more programmatic DOOH screens come online, it's important to know where your campaigns run. Partnering with premium media owners can ensure access to the highest-quality screens in the best locations.
- **Omnichannel DSPs step up their game.** Increased demand has led demand-side platforms to improve/streamline their user experience.
- **Advertisers embrace attribution.** Programmatic campaigns can be measured to quantify real-world results like brand lift, foot traffic, and website visitation.
- **Transit-connected campaigns.** Programmatic availability of OUTFRONT transit media allows brands to target audiences riding subways and trains in New York City, Boston, Washington, D.C., and San Francisco in addition to commuters, pedestrians, and drivers via digital shelters in Atlanta, Miami, Las Vegas, and West Hollywood.

SOURCE: [MAGNA GLOBAL](#), NOV. 2024



SCAN OR CLICK TO READ
ABOUT PROGRAMMATIC
TRANSIT ADVERTISING
IN NEW YORK CITY



OUT OF HOME TRENDS

Brands are using attribution studies to prove campaign impact now more than ever.

OUTFRONT's attribution research has doubled in quantity every year for the last five years.

Marketers need data, and out of home delivers, boasting measurement and attribution capabilities that can gauge both top-of-funnel attitudes and bottom-funnel behavior.

Via **attribution studies**, advertisers can measure brand lift, sales lift, tune-in, website visitation, and app downloads. Advances in technology, like SDKs and panels, have expanded this functionality.

With last year's introduction of bus campaign measurement, advertisers can now take a 360-degree view of performance, bus placements integrated with billboard and rail media.



SCAN OR CLICK TO
LEARN MORE ABOUT
OOH MEASUREMENT
AND ATTRIBUTION





OUT OF HOME TRENDS

Dynamic creative helps keep digital OOH campaigns fresh.

At a certain point, seeing the same ad has diminishing marginal return. Dynamic creative can refresh the campaign's impact while creating contextual relevance.

Impact of Contextual Dynamic DOOH¹

+38%

impact on day 5
vs. static creative

+6%

dwell time

+17%

spontaneous ad
awareness

+7%

sales lift
vs. static creative

Marketing is often described as delivering the right message to the right audience at the right moment. Contextual relevance is the essence of that, and neuroscience can quantify its impact on audiences:

- **Ads for products relevant to the moment** (i.e., breakfast sandwich in the morning) increase brain activity by 12%.
- **Creative relevant to the moment** (i.e., time, weather, location, other live data) increases brain response by 18%.
- **Combining both contextually relevant product and presentation** increases brain response by 32%.



OUT OF HOME TRENDS

Spatial OOH (aka 3D billboards) lifts attention, engagement.

Spatial OOH creative adds a whole new dimension to the battle for attention, engagement, and word of mouth.

Some campaigns have more depth than others. To add dimension, there's spatial creative like our **Xscape** platform.

Nearly three quarters of consumers say they're interested in 3D OOH creative¹, and 68% **see brands using it as more premium**. But it's not just about interest and opinions - this technology moves audiences to act:

- 58% **would share it on social media**.
- 66% say they're **more likely to buy** the product advertised².

+15%

lift in attention
vs. 2D DOOH

+33%

lift in perception as
innovative

+17%

lift in creative appeal
vs. 2D DOOH³





OUT OF HOME TRENDS

Social out of home is the ultimate viral reach multiplier.

The phenomenon of social out of home continues to pick up steam, along with a little empirical evidence.

Four in ten adults will share OOH ads on their social media at least some of the time Including urban dwellers, Gen Z, Millennials, and Hispanic and Black audiences (47%).

For best #sOOH results, provide something of value in your campaign, whether that be entertainment, education, or something more tangible, in exchange for access to its audience's audience.

Why Social Media Users Share OOH



SCAN OR CLICK TO
READ ABOUT HOW THIS
CALVIN KLEIN WALL
CREATES VIRAL BUZZ



SOURCE: [THE HARRIS POLL/OAAA](#), DEC. 2024



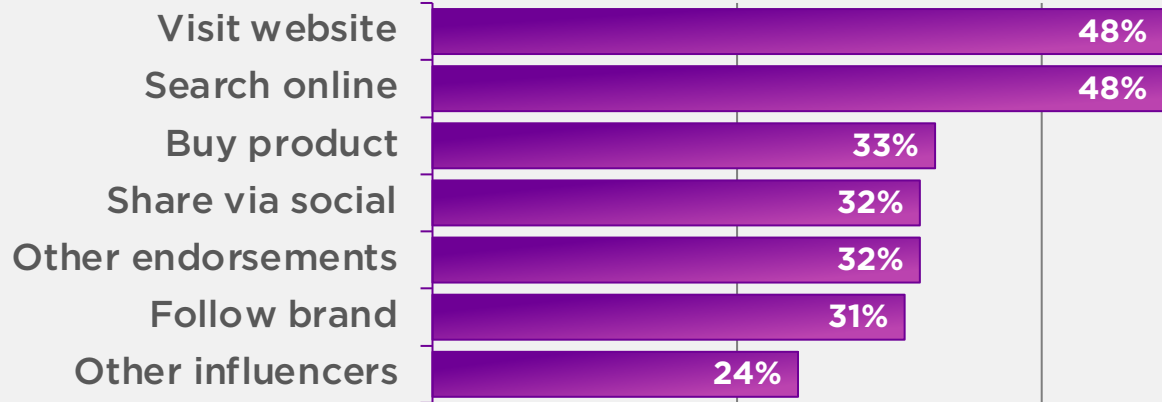
OUT OF HOME TRENDS

Influencer endorsements earn notice, drive action, & lift brands.

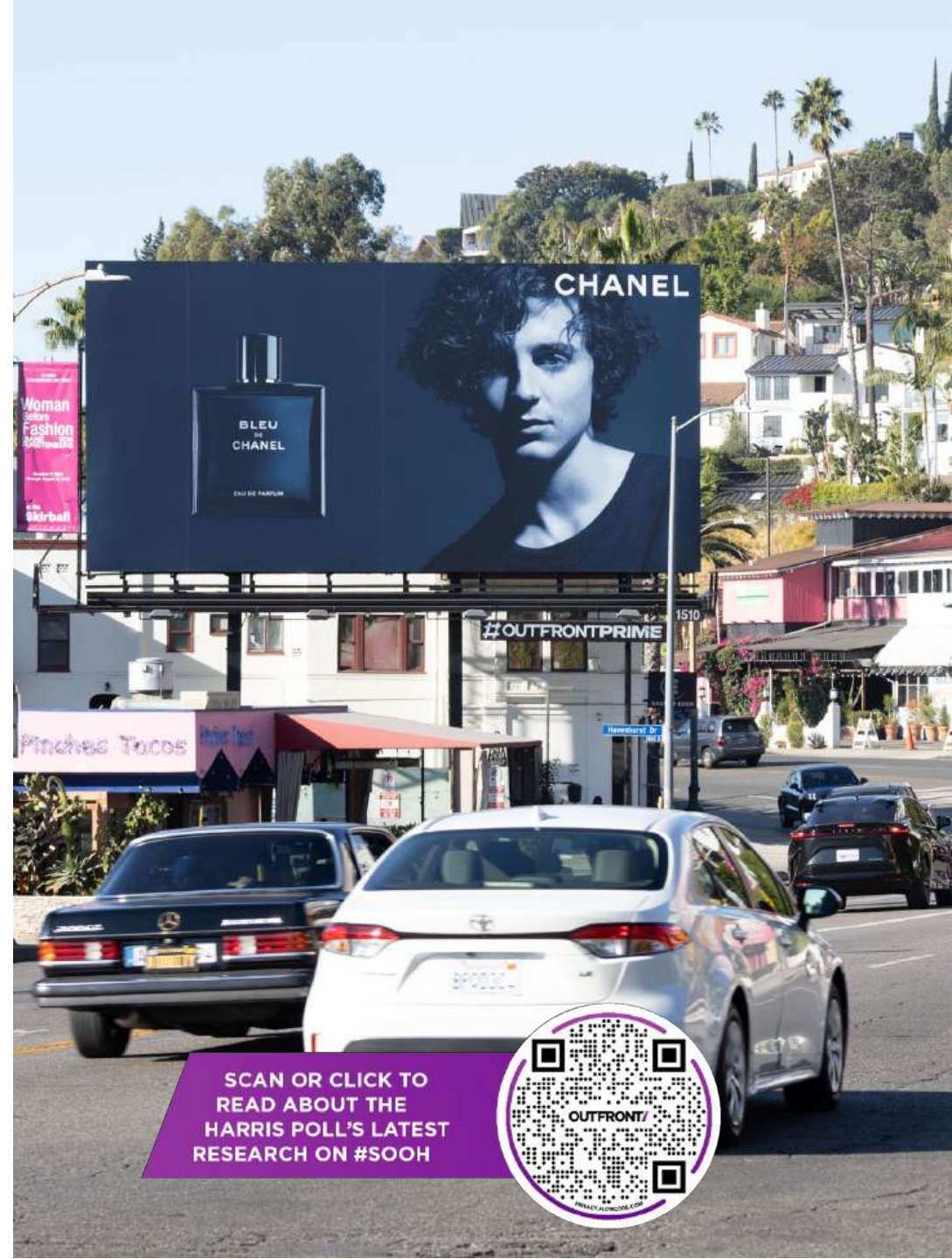
More than 8 in 10 say influencer endorsements can help any brand, nearly half notice influencer content in OOH ads at least sometimes, and two thirds are driven to take action.

When it comes to brand lift, influencers in OOH are needle movers, driving perceptions of high quality (49%), trustworthiness (48%), memorability (34%), desirability (34%), and luxury (32%).

Influencer Endorsements Make an Impact



SOURCE: [THE HARRIS POLL/OAAA](#), DEC. 2024





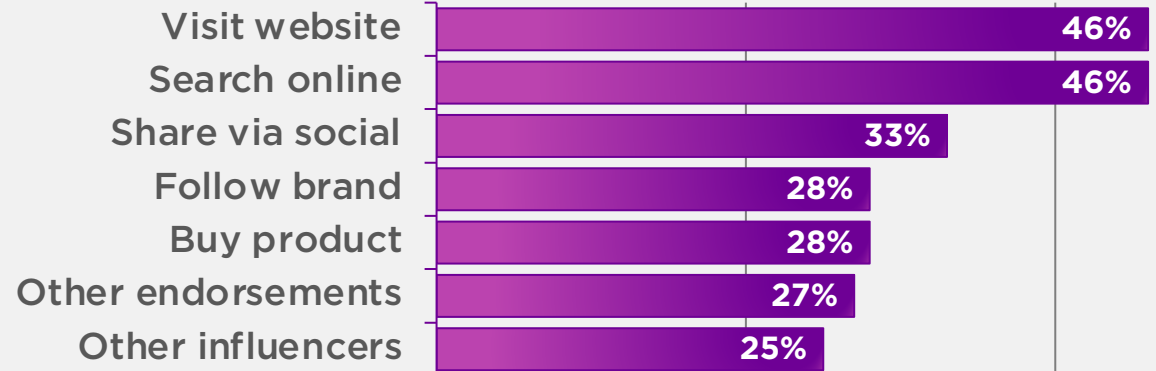
OUT OF HOME TRENDS

Out of home in iconic locations primes brands for prestige.

In places like Hollywood's Sunset Strip and Times Square, advertising doesn't just reflect the culture: it creates it. That's why brands stand tall on our OUTFRONT PRIME canvases.

Iconic locations make a brand metric impact similar to that of influencers in terms of high quality (46%) and luxury (33%) but slightly higher in memorability (38%) and desirability (38%) and nine points lower in driving trustworthiness (39%).

Iconic OOH Locations Inspire Action



SOURCE: [THE HARRIS POLL/OAAA](#), DEC. 2024

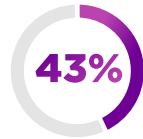


OUT OF HOME TRENDS

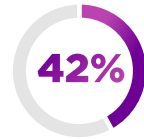
Gen Z embraces interactive OOH.

More than six out of ten Zoomers are likely to notice and engage with interactive OOH, a rate much higher than older generations. That engagement is great news for brands.

Maybe OOH is so attractive to Gen Z because it's a break from their digital immersion. **A majority uses five different social media apps daily:** YouTube, Instagram, TikTok, Facebook, and Snapchat, which explains why so many of them **view social media advertising as more intrusive than OOH (62%).**



researched the brand



told friends & family



made a purchase



followed the brand

+16%

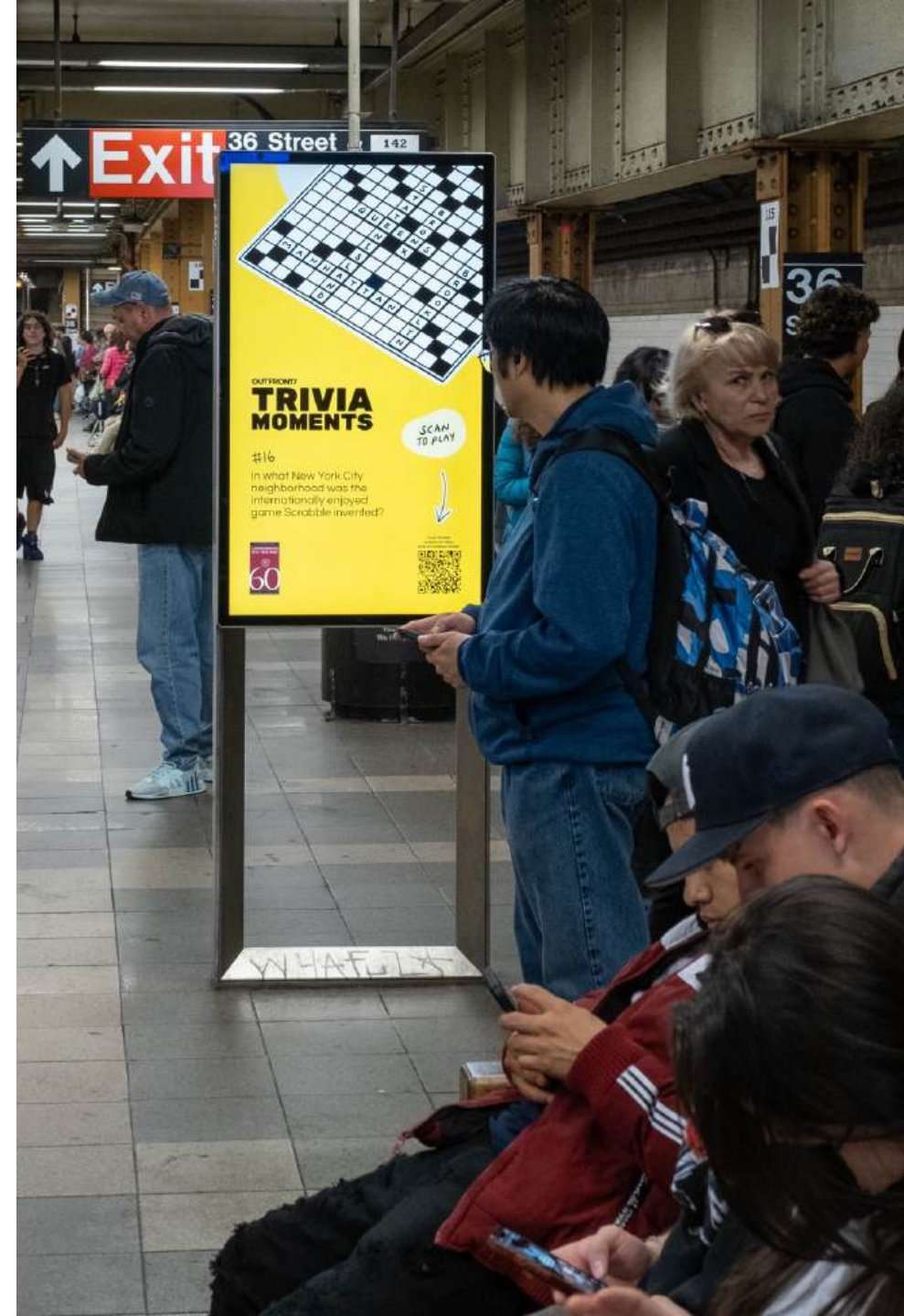
more likely to tell others about eye-catching extensions

64%

attention rate for spatial 3D OOH (+9% vs. gen pop)

70%

interested in dynamic content (+7% vs. gen pop)





OUT OF HOME TRENDS

Traditional static OOH reduces campaign carbon emissions.

Nearly half of CMOs plan to launch new initiatives mitigating the carbon emissions of their media campaigns in the next 12 months¹. Classic billboards and other static formats can help.

“Our number one priority is **effective media planning**. You can create the **greenest media plan**, but if you’re not reaching your target audience, you’re **producing carbon emissions for no reason.**”

– Stephanie Scheller, Managing Partner of Sustainable Solutions EMEA, Omnicom Media Group

Traditional out of home formats offer a sustainability advantage over digital formats on devices because OOH is one-to-many, while an impression on web or mobile reaches just one person, thus a higher carbon footprint on a per-impression basis.

188%

more carbon-efficient than programmatic display

246%

more carbon-efficient than programmatic video

336%

more carbon-efficient than programmatic CTV



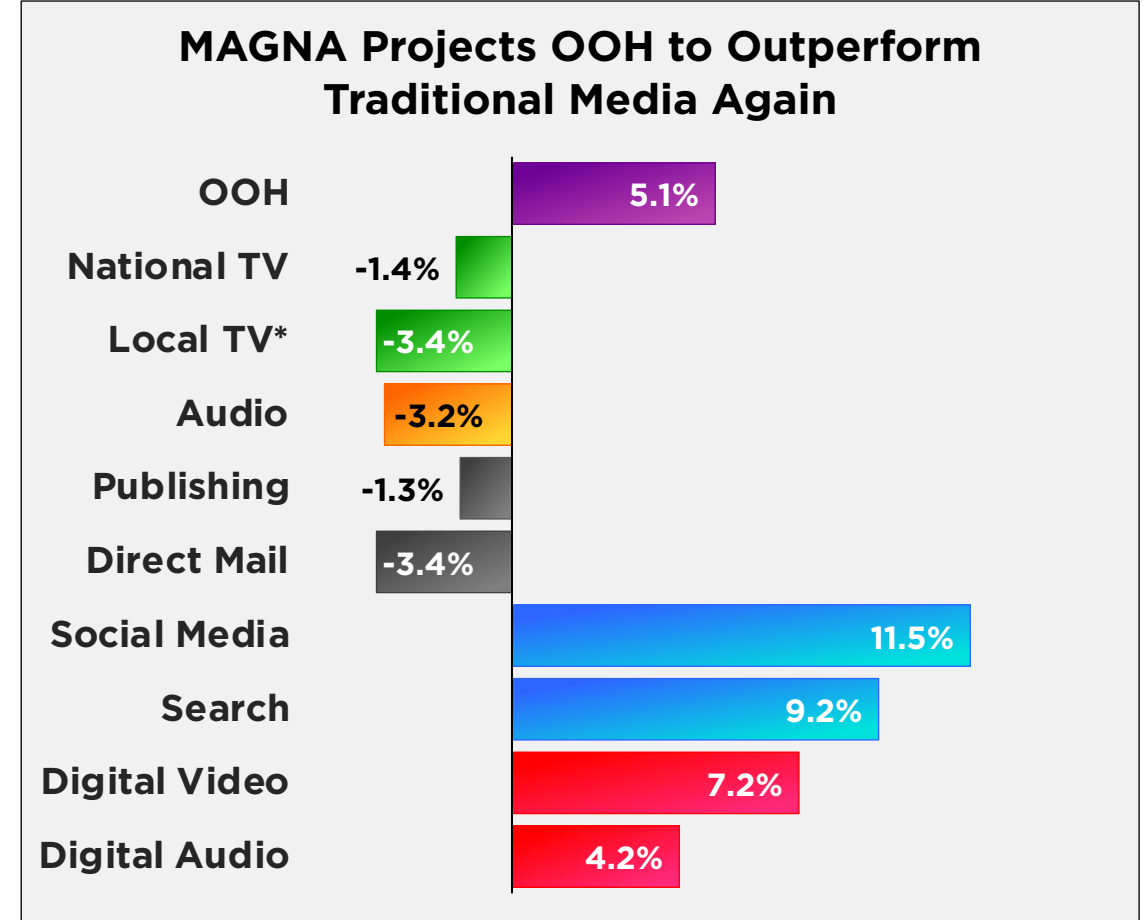
OUT OF HOME TRENDS

Out of home's steady growth is projected to continue.

MAGNA Global once again projects 5-plus points of growth for OOH, outpacing traditional media.

In the pandemic recovery era, OOH has averaged 8% growth per year, while other traditional media saw a 2.5% decline. The trend of **out of home steadily rising while other traditional media stagnates** is a long-term one. OOH outpaced other traditional media by 4.4 points from 2010 to 2019; it is projected to have a 7.2-point advantage through 2028.

MAGNA's analysts pointed to four factors driving overall industry growth: **retail media driving digital spending**, ad-supported streaming tiers, artificial intelligence, and Asia-based DTC e-commerce brands like Temu and Shein.



+5.4% Total OOH, 2024	\$9.7B 2024 Revenue	+10% DOOH, 2024	+12% DOOH, 2025
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SOURCE: [MAGNA GLOBAL](#), DEC. 2024
* EXCLUDES MAJOR CYCLICAL EVENTS





OUT OF HOME TRENDS

OUTFRONT is the top-ranked out of home provider among agencies and brand marketers.

The Myers Report ranked media organizations across television, streaming, social, and OOH. To quote them, **“OUTFRONT dominated across metrics.**

Standing toe to toe with the likes of Meta, YouTube, NBCUniversal, and Disney, OUTFRONT was **the only media provider in the entire advertising industry to place top three** in all five of these performance measures:

- Tied for #2 in **delivering large audience reach**
- #3 in **meeting or exceeding cost efficiency goals**
- #3 in **brand safety**
- #3 in **effective communication of value**
- Tied for #3 in **delivering attentive sales organization support**





CLEARANCE 19' 0"

THANK YOU!

OUTFRONT

ARE YOU READY FOR
YOUR NEXT OUT OF
HOME CAMPAIGN?
CONTACT US NOW!

