

**OUTFRONT/**

**ADVERTISING TRENDS REPORT - LATE 2025**

**HOW AND WHY  
OOH ADVERTISING  
INFLUENCES REAL LIFE**



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## Media Trends

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- “Ambient shopping” is blurring the lines on the omnichannel buyer’s journey.
- Brand trust is more critical than ever.
- Gatekeeping media environments are trusted more than UGC platforms.
- Savvy brands are emphasizing brand over performance and getting performance anyway.
- Strong branding and emotional ads are key to creating distinctiveness.



## IRL Out of Home Trends

- Out of home, in-real-life media is more trusted than all online formats.
- IRL media also beats online in attention and engagement.
- Low CPMs and high impression quality deliver more value to advertisers.
- By virtue of its non-intrusive nature, IRL advertising positively impacts brand opinion.
- Digital out of home fuels the full funnel.
- AR and dimensional creative further supercharge the power of DOOH.





# OUTFRONT/ CONSUMER TRENDS





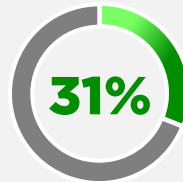
## CONSUMER TRENDS

# Though inflation has slowed, consumers are still feeling the price pinch.

Though the 2.3% figure for April was the lowest CPI number in four years<sup>1</sup>, **inflation remains the number one concern of American consumers**, cited by 43%. Tariff policies came in second at 29%<sup>2</sup>.

Three out of four say their income hasn't kept pace with rising prices and 68% say that housing in their area is not affordable. In fact, **paying for groceries and housing** are cause for concern, each among half of all consumers<sup>3</sup>.

Consumers Are  
Cooking at Home  
More Often<sup>4</sup>



Lunch



Dinner





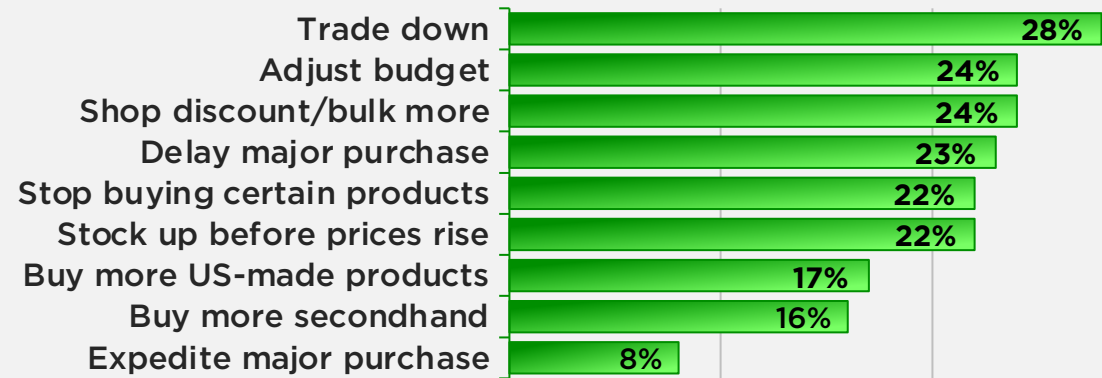
CONSUMER TRENDS

Consumers are already  
changing their behavior in  
response to tariffs.

Consumers are bracing for tariffs to increase costs of the things they buy. A full three quarters expect prices to increase; 49% expect them to increase “a lot<sup>1</sup>.” By one estimate, the average household could expect tariffs to cost \$5,000 per year<sup>2</sup>.

In response, they’re taking many of the same actions used to mitigate against inflation last year.

Consumers Bracing for Tarriff Price Hikes<sup>2</sup>



SOURCES: 1. [YUOGOV](#), APR. 2025; 2. [COLLAGE GROUP](#), APR. 2025







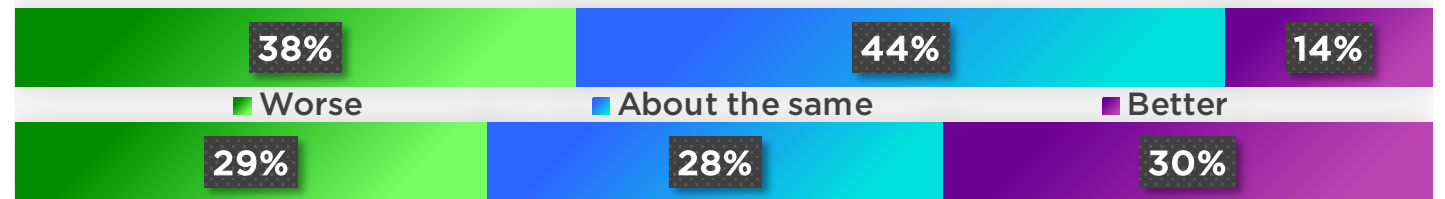
## CONSUMER TRENDS

# Yet despite rising prices, most Americans **are optimistic about their personal finances.**

Consumers may be sour on the economy, but they're bullish on themselves. **52% of Americans now rate their personal finances as fairly or very good<sup>1</sup>**. Among those who don't feel that way, 80% cited prices as a contributing factor; more than half pointed to their difficulty in paying bills or building savings<sup>2</sup>.

But even some of those who consider their finances in good shape remain on alert – **72% of consumers report feeling “concerned” about money** and 65% describe themselves as “stressed” about it<sup>1</sup>.

**14%** say financially they are **better off this year** than last



**30%** expect to be **better off next year** than this year<sup>3</sup>

SOURCES: 1. [CBS NEWS/YOUGOV](#), MAY 2025; 2. [MINTEL](#), MAY 2025;  
3. [THE ECONOMIST/YOUGOV](#), APR. 2025







## CONSUMER TRENDS

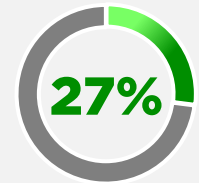
# While rising food prices are eroding loyalty, **private label brands are creating it.**

With cost the number one decision factor for where to buy groceries, loyalty is only as strong as this week's deals<sup>1</sup>.

But then there are Trader Joe's and ALDI, which have seen year-over-year visitation increases of 6.2% and 18.2% respectively, along with increasing share-of-wallet, indicating that each is establishing itself as the go-to choice of its customers<sup>2</sup>.

**Private label brands** – which make up three quarters of the sales at each – are a big reason why<sup>3</sup>. Private labels (aka store brands) are growing at four times the rate of national brands<sup>4</sup> – and consumers are twice as likely to be buying more of them<sup>5</sup>.

Over One in Four  
Changed Primary  
Grocer Last Year<sup>1</sup>



37% of Gen Z &  
45% of Millennials

SOURCES: 1. [MINTEL](#), APR. 2025; 2. [PLACER.AI](#), MAR. 2025; 3. [NUMERATOR](#), MAY 2025; 4. [PLMA](#), JAN. 2025; 5. [FMI](#), JUNE 2025





A photograph of a busy street in California, likely in a coastal area given the palm trees. In the foreground, the rear of a blue Toyota RAV4 is visible, with a California license plate that reads "BAYTYME". The street is filled with other cars, and a billboard for "SCRL" is visible in the background. The billboard advertises "Templates for your beach posts" and features a woman on a beach. The text "OUTFRONT" is also visible on the billboard structure.

**“You have two jobs if you want to build a brand. It must come to mind, and it must stand for the things you want it to stand for. That’s it.”**

**– Professor Mark Ritson, 2024**

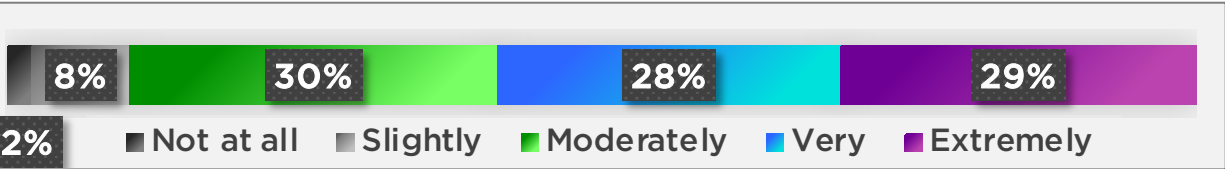
**SOURCE: [SALSIFY](#)**



CONSUMER TRENDS

What's one thing that everyone wants, but nobody can buy at any price? Authenticity.

In the age of AI slop, bot farms, fraudulent reviews, and deepfakes, the importance of brand authenticity is nearly universal.



Authenticity is the top-ranked factor building trust, higher even than past experience with the brand.



SOURCE: [ATOM RADAR](#), SEP. 2024;





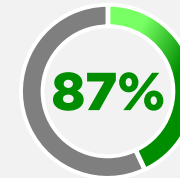


## CONSUMER TRENDS

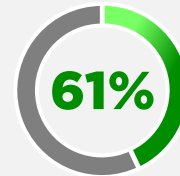
# Earning your customers' trust is critical & it pays dividends.

In a suspicious world, **brand trust is ranked equally with quality and price<sup>1</sup>** for driving product consideration.

Because ultimately, we don't just buy brands; we have relationships with them. And trust is what relationships are built on.

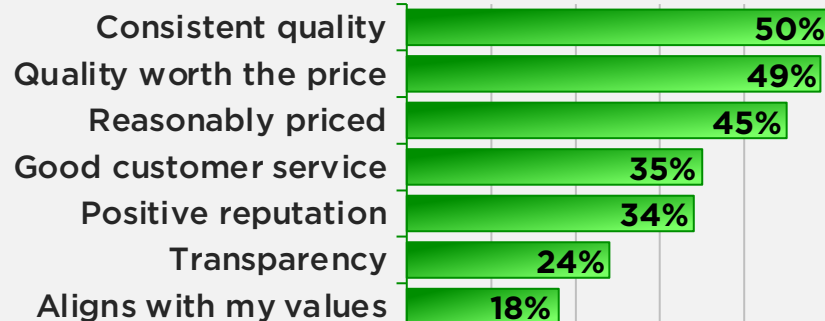


have paid more to buy a trusted brand<sup>4</sup>

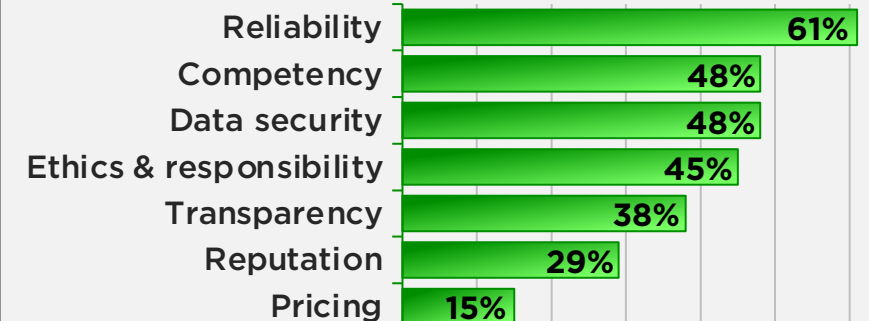


prioritize trust when interacting with a company<sup>5</sup>

### What Earns Consumer Brands Trust<sup>2</sup>



### What Earns B2B Brands Trust<sup>3</sup>



SOURCES: 1. [EDELMAN](#), JUNE 2025; 2. [KANTAR PROFILES/MINTEL](#), FEB. 2025;  
3. [INSTITUTE OF PRACTITIONERS IN ADVERTISING/FINANCIAL TIMES](#), JULY 2025;  
4. [CIVICSCIENCE](#), MAR. 2025; 5. [QUALTRICS XM INSTITUTE](#), FEB. 2025



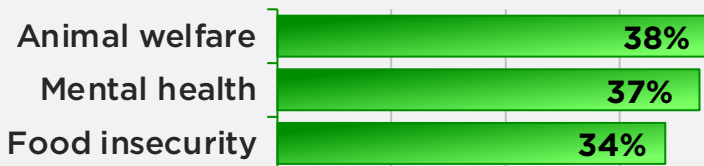
## CONSUMER TRENDS

# Consumers will choose brands that align with their values.

When eight in ten see brands themselves as political<sup>1</sup> and every purchase has seemingly become a political act, brands must stand for something bigger than themselves.

Like our human relationships, we want the brands we associate with to share our values. **88% of us strive to make purchases that align with who we are** and 84% will recommend a brand based on its values. 55% say shared values make us more loyal and 64% will even pay a premium for that alignment<sup>2</sup>.

### Top Values Shared Across Party Lines<sup>2</sup>



### A Polarized Public Has Different Priorities<sup>2</sup>

**52%**

of liberals identify women's rights as a top value

**45%**

of conservatives say supporting military is a top value







## CONSUMER TRENDS

# Consumers expect brands to speak out, take a side, and stand on business.

**When brands demonstrate that the values they profess are not authentic, consumers lose trust and shop elsewhere. And when brands stay silent, consumers assume the worst.**

**Only 12% of consumers favor that brands stay neutral in** important social conversations, while 53% feel disappointed<sup>1</sup>. In fact, when a brand stays silent on an issue, 53% assume they're either doing nothing, or worse, hiding something. 51% will be less likely to purchase as a result. That obligation to speak and act is even more pressing when it's an issue in which the brand has a stake, and more than six in ten Americans want brands to **communicate their values in the context of their product offerings**, not as a separate message<sup>2</sup>.

Perhaps the only thing more dangerous for brands than staying neutral is taking a stand and backing down, which screams "inauthentic." **One in five consumers - including 40% of Gen Z - has broken up with a brand for rolling back its DEI initiatives**<sup>3</sup>. One mass-market retailer which did so faced boycotts that caused a \$700 million year-over-year drop in net sales<sup>4</sup>.

SOURCES: 1. [GWI/GIVSLY](#), MAY 2025; 2. [EDELMAN](#), JUNE 2025; 3. [THE HARRIS POLL/AD AGE](#), APR. 2025; 4. [YAHOO! FINANCE](#), MAY 2025





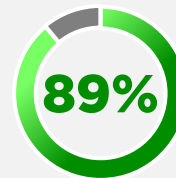


## CONSUMER TRENDS

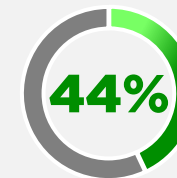
# Pessimistic about its financial prospects, **Gen Z instead seeks meaning at work and outside it.**

**With financial milestones increasingly out of reach, Gen Z is taking alternate routes to find joy and meaning in their lives.**

Seven in ten among Gen Z doubt they'll ever own a home and only 31% expect they'll be able to retire<sup>1</sup>. With **52% of Gen Z living paycheck to paycheck**, it's no wonder 40% say they're stressed or anxious most or all of the time<sup>2</sup>.



consider purpose essential in their careers<sup>2</sup>



have left a job due to lack of purpose<sup>2</sup>

Gen Z is also **seeking meaning outside work**. Dog and cat ownership rates are up 17% and 21%, respectively, since 2018. And fandom has become an important vessel for fulfillment and community, with two out of three 18-34s meeting close friends that way<sup>3</sup>.

SOURCES: 1. [GOODWILL/McKINSEY](#), MAR. 2025; 2. [DELOITTE](#), JUNE 2025; 3. [IPSOS](#), MAY 2025





## CONSUMER TRENDS

# Goods-focused consumers want different things from experiences.

Do we have enough stuff? Consumers are now twice as likely to prefer spending their discretionary income on experiences than on goods<sup>1</sup>. **Luxury consumers are three times as likely<sup>2</sup>**. And experiences make great presents too – one in five consumers gifted an experience in 2024<sup>3</sup>.

It's important to note that when they do participate in experiences, consumers who prefer goods have very different motivations than those for whom experience is the first choice.

### Goods-Focused Consumers Have Different Motivations for Pursuing Experiences<sup>1</sup>



SOURCES: 1. [GENSLER](#), FEB. 2024; 2. [AFFLUENT CONSUMER RESEARCH CO.](#), MAY 2025; 3. [DELOITTE](#), OCT. 2024





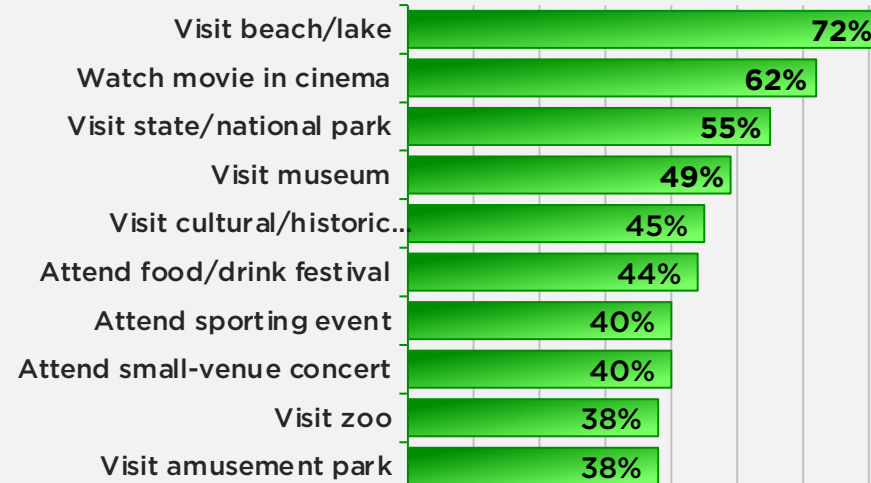


## CONSUMER TRENDS

# Despite economic uncertainty, travel remains resilient.

Travel is one experience consumers seem particularly unwilling to cut back on, even if it means tighter belts elsewhere. Always on the hunt for deals, 29% say cost is their primary decision factor. But while average summer vacation budgets are down 7%, **intent to travel this summer is up three points**. What squares these mixed signals? **A shift from the sky to the road<sup>1</sup>**.

### We're Planning Plenty of IRL Activities<sup>2</sup>



### Travelers Staying Close to Home This Summer<sup>3</sup>



are planning more road trips this summer



plan on enjoying more local attractions this summer

SOURCES: 1. [KPMG](#), APR. 2024; 2. [INTEGRATED INSIGHT](#), JUNE 2025; 3. [CAMPSPOT/PILOT](#), MAY 2025





# OUTFRONT/ MEDIA TRENDS





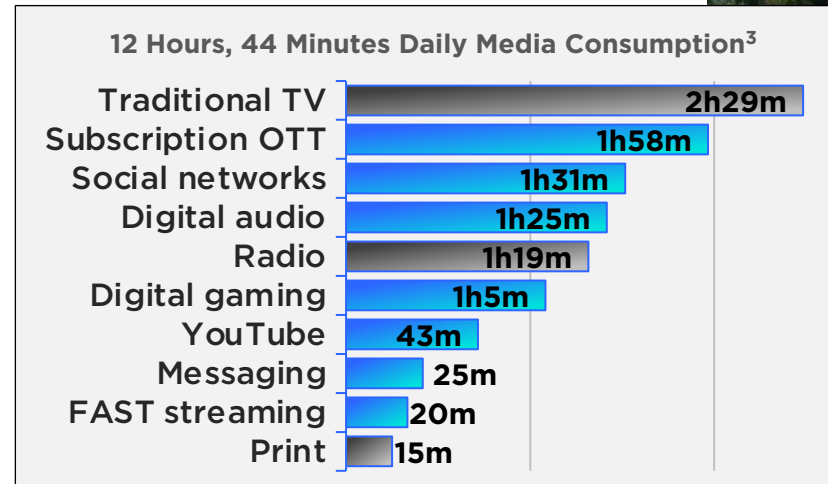
## MEDIA TRENDS

# Staring at screens all day is wearing down our brains.

**“Our big question was, are we adapted to deal with constant connection to everything all the time? The data suggest that we are not,” said researcher Adrian Ward<sup>1</sup>.**

With an average daily media consumption of 12 hours and 44 minutes, It's no wonder people are looking to disconnect from devices and reconnect with real life. In a recent study, **71% reported better mental health after a two-week phone break.** Perhaps more astounding, attention spans improved by an amount equivalent to reversing 10 years of cognitive decline<sup>1</sup>.

The negative impact of digital fatigue is well documented. Over the past 15 years, peer-reviewed studies have found that it causes cognitive overload, reduced job satisfaction, mental and emotional exhaustion, stress, sleep disturbances, anxiety, and reduced decision-making accuracy<sup>2</sup>.



SOURCES: 1; [UNIVERSITY OF TEXAS AT AUSTIN](#), FEB. 2025; 2. [ENVIRONMENT AND SOCIAL PSYCHOLOGY](#), FEB. 2025; 3. [EMARKETER](#), JULY 2025





## MEDIA TRENDS

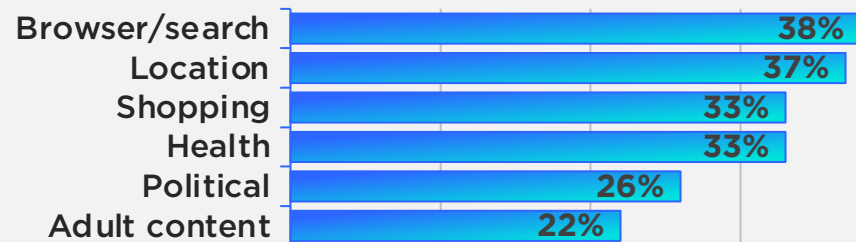
# Consumers are concerned about their personal privacy.

**Privacy is a top priority for consumers, who want their personal data protected – not used for invasive advertising.**

In fact, responsible use of personal data is the single most important factor shaping customer experience with brands<sup>1</sup>, but the majority are failing on this count. There's a **39-point gap between those who say how brands use their data is important and those satisfied with how brands are doing so**<sup>2</sup>.

While Americans as a whole are most concerned about browsing and search data (38%), cybersecurity experts are far more concerned (48%) about nefarious usage of their health data<sup>3</sup>.

### Consumers Concerned About Sensitive Data<sup>3</sup>





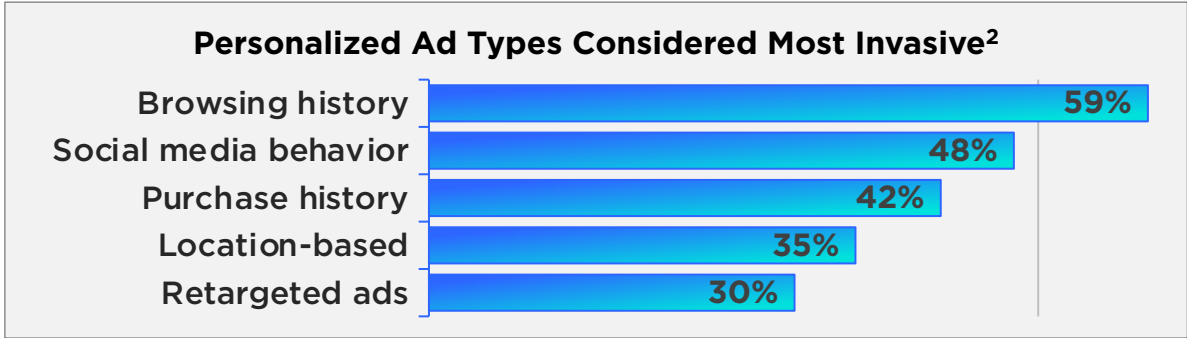
MEDIA TRENDS

# For the first time, a majority of consumers use ad blockers.

**The resistance grows: 52% of consumers now use ad blockers. Among those aged 25 to 44, two out of three do<sup>1</sup>.**

Consumers have had it with disruptive, invasive online ads. When Google attempted to restrict ad blockers on YouTube, the move backfired, with 49% of consumers saying they were *more* willing to use one than before<sup>1</sup>.

Part of why consumers are more resistant to digital advertising is its increasing creepiness: 56% of consumers are **uncomfortable with ads personalized based on their behavior<sup>2</sup>**.



SOURCE: 1. [CENSUSWIDE/GHOSTERY](#), MAR. 2024; 2. [YOUNGOV](#), MAR. 2025;







## MEDIA TRENDS

# Consumers broadly reject AI's use in marketing channels.

Overwhelmingly, consumers respond negatively to encountering AI-generated material on their path to purchase. That's especially true of advertising: **Americans prefer human-driven ads over AI by more than a 2-to-1 margin<sup>1</sup>.**

Even a majority of Zoomers rejects AI-generated marketing imagery. 64% say it's inauthentic and 55% call it misleading<sup>2</sup>.

### Likelihood to increase vs. decrease trust, net<sup>1</sup>



SOURCES: 1. [IPSOS](#), JUNE 2025; 2. [ATTEST](#), MAR. 2025



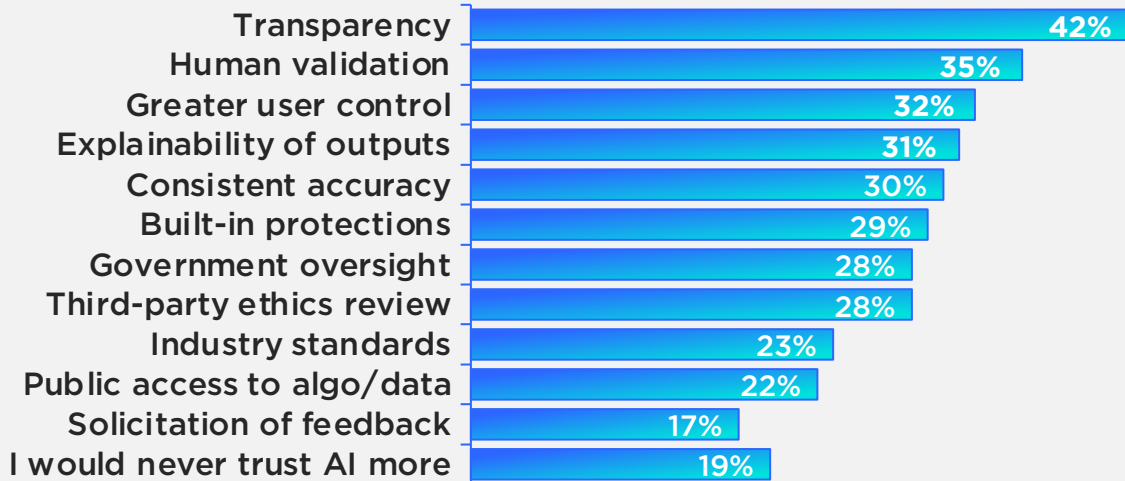


## MEDIA TRENDS

# Brands should directly address consumers' mistrust of AI.

The numbers on AI tell a story of suspicion. **58% of consumers are concerned about AI using their personal data<sup>1</sup>** and **only 37% trust it to not discriminate or show bias<sup>2</sup>**. More than seven in ten have concerns about the overall ethics of AI<sup>3</sup>, and at 31%, Americans trust their government less than every nation surveyed when it comes to expectations of responsibly regulating it<sup>4</sup>. But there are things brands can do to ease consumers' worries.


### Factors That Would Increase Consumer Trust in AI<sup>3</sup>



SOURCES: 1. [PROSPER ANALYTICS](#), JULY 2025;; 2. [IPSOS](#), MAR. 2025; 3. [SALESFORCE](#), OCT. 2024; 4. [IPSOS](#), JUNE 2025





The background image shows a multi-lane highway interchange with several cars. In the distance, a large billboard features a soccer player in a blue jersey and the text "THE FC MADE IN NYC" next to the New York City FC logo. The New York City skyline is visible in the far background under a hazy sky. A blue road sign for "The New York State EXPERIENCE" and "New York City Region" is visible in the foreground.

**“What’s more apparent than ever before is that shopping is no longer just something that shoppers ‘do’ – it’s something that’s always happening (whether they’re aware of it or not). It’s become clear that the boundaries between ‘shopping’ and ‘not shopping’ have dissolved.**

**Scrolling TikTok or Instagram? You’re also shopping. Watching Netflix or YouTube? Same thing.”**



## MEDIA TRENDS

# On the buyer's modern path to purchase, **lines continue to blur.**

**What is ambient shopping? You've probably already done it. 69% of us have<sup>1</sup>.**

Salsify defines ambient shopping as **“the act of making a purchase while doing something else, such as casually browsing social media or watching a streaming service, without intentionally searching for that product.”**

The concept reflects our “always-on” reality, acknowledging algorithmic discovery (such as via TikTok’s “For You” page), along with AI-based recommendations and the influence of creators.

For ambient shoppers, the keys to conversion are removing friction and providing them with everything needed to reach and execute a decision.







## MEDIA TRENDS

# The omnichannel journey has matured as buyers integrate digital and IRL touchpoints.

Omnichannel is now the rule, not the exception. Nine in ten U.S. consumers shop across **an average of six touchpoints** including brick-and-mortar, online, DTC, marketplaces, and social commerce<sup>1</sup>.

### The Omnichannel Path to Purchase<sup>2</sup>

	67% engage in <b>Webrooming</b>	63% engage in <b>Showrooming</b>
Research	Online	In-Store
Buy	In-Store	Online

Omnichannel strategies must align with consumer journeys in a cohesive way. That omnichannel alignment pays off, making campaigns 40% more attention-grabbing, 50% more persuasive, 50% more likely to connect, and 70% more memorable than disconnected campaigns.<sup>3</sup>

SOURCES: 1. [NIELSEN IQ](#), MAR. 2025; 2. [SALSIFY](#), JAN. 2025; 3. [THE TRADE DESK](#), FEB. 2025

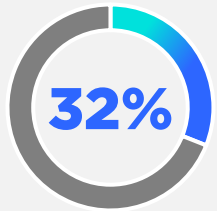




## MEDIA TRENDS

# Gen Z's path to purchase starts at the store as often as it does on social media.

You'd expect the first true digital natives to do their product discovery on social media. And they do. But **the majority of Gen Z also discover new products at physical stores at higher rates than older consumers.** This is truly the omnichannel generation.



of Gen Z use retailers' mobile apps while shopping in-store

As for social, Gen Z discovers new products on TikTok at a rate double that of older generations (67%); Instagram is nearly as popular for this purpose (66%).

Of those who discover products on social media, **one in three goes on to visit the brick-and-mortar location. And more than half buy there.**







## MEDIA TRENDS

# Tired of screens as everyone else, **Gen Z responds well to brands in real life.**

Like older consumers, Gen Z is fatigued with screens – **81% wish it was easier to disconnect** from them<sup>1</sup> and 46% are actively taking steps to limit their screen time<sup>2</sup>.

This is reflected in younger generations' affinity for IRL shopping experiences, both in-store (79%) and at home when receiving catalogs (73%) or unboxing purchases (74%)<sup>1</sup>.

But ultimately, technology is part of our lives and 84% of Gen Z say **they value brands that blend technology with IRL experiences**<sup>1</sup>.




















# The everything apps: social platforms expand their scope.

Social media isn't just about connection anymore – it's about journalism, it's about entertainment, it's about commerce.

Perhaps the most tectonic social shift is for news. **54% use social as a main news source, eclipsing television for the very first time**<sup>1</sup>. For Gen Z, the preference is 64-32. For boomers, those numbers are flipped<sup>2</sup>.

Social is also now **many consumers' first choice for search** – especially Gen Z, who prefer searching on social over traditional search by a 41% to 32% margin<sup>3</sup>.

Three in ten even say social content is more relevant to them than TV or movies<sup>4</sup>.

Top Social Networks by Monthly Activity <sup>5</sup>					
Users		Time		Sessions	
	85.3%		43h 53m		268.9
	74.4%		24h 43m		259.9
	57.8%		16h 24m		219.6
	45.1%		11h 2m		201.8
	35.8%		7h 22m		187.1

SOURCES: 1. [REUTERS INSTITUTE](#), JUNE 2025; 2. [IPSOS](#), MAY 2025; 3. [SPROUT SOCIAL](#), MAY 2025; 4. [DELOITTE](#), MAY 2025; 5. [DATA REPORTAL](#), APR. 2025,



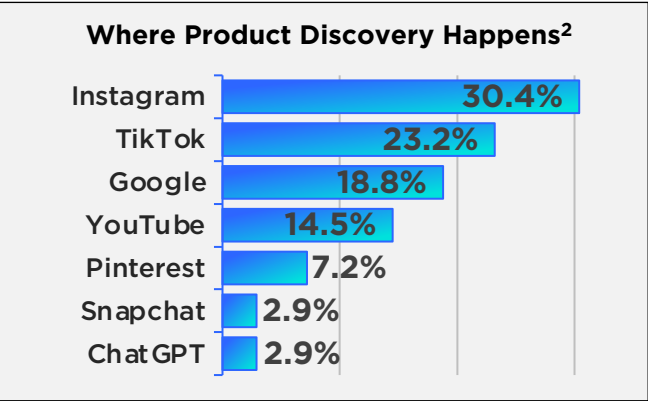
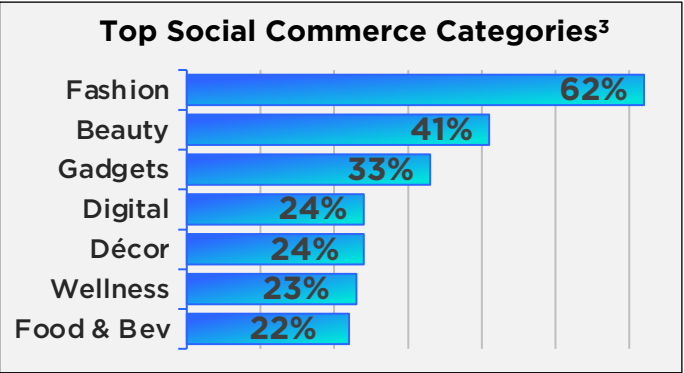


MEDIA TRENDS

# Social shopping is big business and not just for Gen Z.

Social media is fully integrated into the modern buyer's journey, which ends there as often as it begins.

61% of consumers have purchased something on social. 33.5% of social buyers do it weekly, another 33.7% monthly. And **six in ten social shoppers prefer buying in-app**<sup>1</sup>.



SOURCES: 1. [GRIN](#), JAN. 2025; 2. [SPROUT SOCIAL](#), MAY 2025; 3. [YUOGOV](#), MAR. 2025



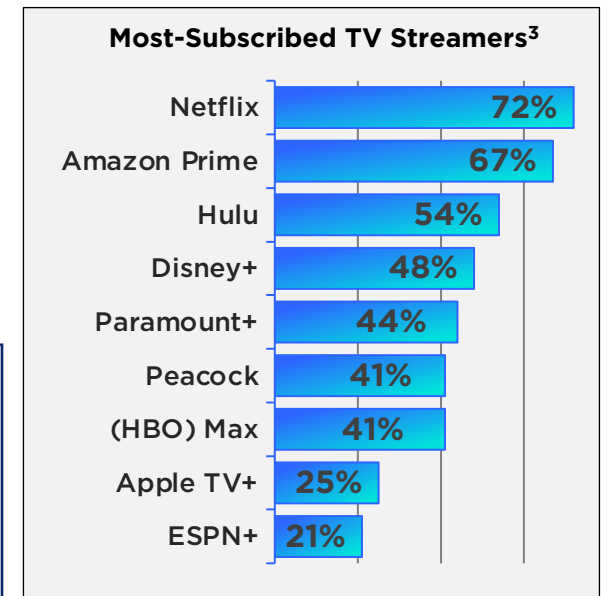


## MEDIA TRENDS

# While 66% prefer ad tier subscriptions, **most CTV campaigns have limited reach.**

Maybe it's belt-tightening, or maybe we've just gotten used to the idea of ad-supported streaming. Ad tiers now represent 71% of net adds and 46% of subscriptions, up from 33% in 2023. Meanwhile, ad-free subscriptions remain flat<sup>1</sup>.

But effectively reaching this audience remains challenging. **The average CTV campaign in 2024 reached fewer than 20% of households<sup>2</sup>.** Meanwhile, the gap between streaming and linear TV continues to widen<sup>3</sup>.







## MEDIA TRENDS

# Brands can forge deeper creator partnerships if they solve one big disconnect.

**Creators can bring brands more than their audiences; they also come with enthusiasm and curiosity.**

For 88%, creating content is a side hustle. But side hustle or no, these people take what they do seriously and want to be taken seriously. In fact, 72% say they don't just want a check from a brand – **they want long-term partnerships** with them.

And great partners these creators can be. The majority say that they want to learn about how they fit into brands' larger marketing strategies. They also say that stronger understanding of brand KPIs would help better inform their strategies.

Because **despite creators ranking content and creativity the top metric after engagement, they see brands assigning higher priority to follower growth, reach, and conversion** while placing constraints on creative. But creators don't want a blank slate from their partners – 58% want clear brand guidelines to follow.







## MEDIA TRENDS

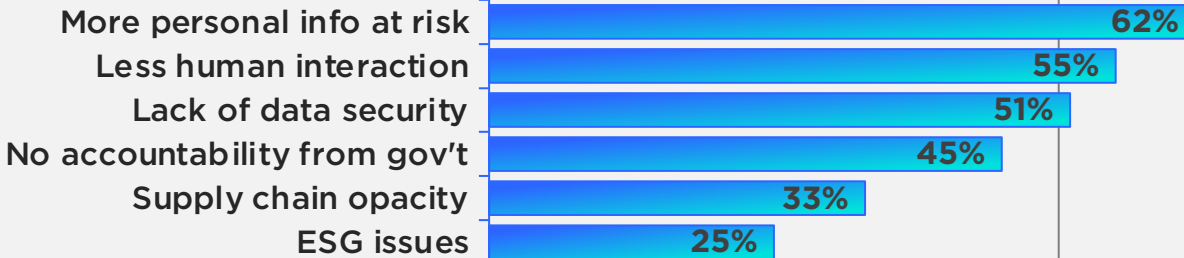
# Trust is more important now because the stakes are higher.

**In the C-suite, two out of three recognize that trust is more important nowadays than it's been in the past.**

A trustful relationship benefits both parties. Consumers benefit from more confidence in recommendations, quicker decisions, less concern about delivery/performance, and a sense of partnership.

Brands benefit from trust through customer loyalty, brand equity, recruitment/retention, premium pricing, easier cross-selling, improved profits, and greater resilience.

### Why Trust Is More Important Now?



SOURCE: [INSTITUTE OF PRACTITIONERS IN ADVERTISING/FINANCIAL TIMES](#), JULY 2025





## MEDIA TRENDS

# What makes a media platform trustworthy? **Gatekeeping.**

**“Trust is not a nice-to-have,” reads a new study from Financial Times and the IPA. “It is a strategic competitive advantage.”**

This exhaustive research identified that a major determining factor in whether a medium is trusted is **gatekeeping** – in other words, the platforms consumers trust most are the ones that exclude user-generated content in favor of curated, professionally created material.

Mediums that maintain control over their content are more trustworthy to consumers by a net 50 points, and **59% of business decision-makers say that using gatekeeper media is important or very important to advertisers looking to build trust.**

Consumers also feel more peace of mind about how their personal data is used by gatekeeper brands, 53% to 14% over non-gatekeepers.







## MEDIA TRENDS

# Trust flourishes in real life.

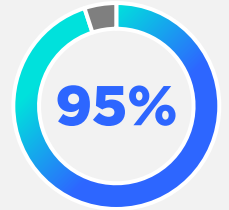
**How can brands navigate an ecosystem of collapsing trust? Rebuild it in real life.**

After four years of a near-50/50 split, 71% of consumers now say they trust brands less than they did a year ago<sup>1</sup>. Statisticians have a word for this: yikes.

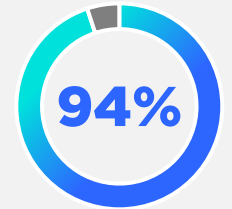
Fortunately for brands, there's a very simple, near-universal way to build trust: **presence in real life**, such as via brand activations or special events.

That trust is durable too, with the positive perception earned by the brand event lasting at least a few months for 47%<sup>2</sup>.

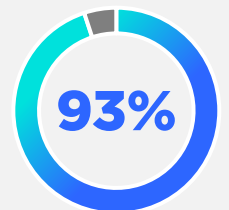
After in-person events<sup>2</sup>:



trust the brand  
is good at what  
it does



trust the brand  
to be honest



trust the brand  
to keep its  
promises

SOURCES: 1. [SALESFORCE](#), OCT. 2024; 2. [FREEMAN](#), MAR. 2025





## MEDIA TRENDS

# Contextual relevance lifts brand trust and customer acquisition.

**Brands can reap big rewards in cultural moments by leaning into contextual relevance – but only if they act quickly.**

Three out of four people say that their trust in a brand would increase if it authentically reflected today's culture<sup>1</sup>. But reflecting culture drives more than trust - **contextual relevance** can double search and triple purchase intent<sup>2</sup>, and the more closely tailored to the brand, the stronger the impact.

But time is of the essence. Three quarters say that **brands should respond to cultural moments within one week**. But 57% struggle to react quickly enough<sup>3</sup>. That single week of delay can cool off 18 points worth of purchase intent<sup>2</sup>.

SOURCES: 1. [EDELMAN](#), JUNE 2025; 2. [MAGNA/SIGHTLY](#), FEB. 2025; 3. [LIONS ADVISORY](#), JUNE 2025;







## MEDIA TRENDS

# Advertisers' use of contextual relevance doesn't fulfill consumers' appetite for it.

**94% of consumers prefer contextually relevant advertising and 80% are more likely to engage with it<sup>1</sup>.**

Contextual relevance lags in marketer usage behind advertising targeted by demographics, interests, or behavioral data and only 35% say they're "very likely" to use it in their next campaign<sup>2</sup>.

### How Consumers React to National Brands Using Local Messages<sup>3</sup>





## MEDIA TRENDS

# While dominant, performance marketing faces an “existential threat:” Google itself.

**Digital display grew by 17% last year<sup>1</sup>, but Google’s shift to a zero-click strategy has publishers nervous.**

One in eight digital dollars is now spent on display<sup>1</sup> – but the majority of publishers say they’re “very concerned” about changes to Google’s algorithm diminishing organic traffic in favor of AI Overviews and its own websites<sup>2</sup>. In fact, pages with AI summaries are barely half as likely to result in clicks on search results than pages without them<sup>3</sup>.

Why is this happening?

A former Google exec told *Bloomberg* that the company sees giving traffic to publisher sites as “kind of a necessary evil. The main thing they’re trying to do is get people to consume Google services...so there’s a natural tendency to want to have people stay on Google pages, but **it does diminish the sort of deal between the publishers and Google itself<sup>4</sup>.**”

In other words, enshittification.

SOURCES: 1. [GARTNER](#), JUNE 2025; 2. [PERFORMANCE MARKETING ASSOCIATION](#), JUNE 2025; 3. [PEW RESEARCH](#), MAY 2025; 4. [SEARCH ENGINE LAND](#), MAR. 2025; 5. [SEARCH ENGINE LAND](#), JUNE 2025

### YOY Change in Google Search<sup>5</sup>

**-3.9%**

clicks to organic search results

**+2.8%**

zero-click searches

**+2.2%**

clicks to Google-owned properties







## MEDIA TRENDS

# For your consideration: investment in brand **pays off** **in long-term performance.**

**CMOs remain 2.5x more likely to prioritize performance, but 85% agree that investing in brand drives business results<sup>1</sup>.**

Why have big-name brands like Airbnb and Nike have shifted their advertising budgets from performance marketing to brand building?

It's because 84% of buyer's journeys end where they begin – with the brand the consumer expected to buy in the first place<sup>2</sup>. That means that **if you're introducing your brand to new buyers when they're actively in market, you're already too late.**

By entertaining and creating emotional resonance, brands can establish themselves for consideration before the buyer starts their search.







## MEDIA TRENDS

# Short-termism has diminishing returns **but brand effects stack and compound over time.**

There are two kinds of marketers: those who chase short-term campaign outcomes like impressions, social engagement, and conversion rates – and those who keep their eye on business results like profit, penetration, loyalty, and growth.

The second group maximizes business results by ignoring the vanity metrics and playing the long game by focusing on **creating lasting brand effects like awareness, trust, differentiation, and distinctiveness** that gain momentum over time. It's a grind that pays off – after three years, campaigns in the top quartile of brand impact achieve nearly 50% more business results than those in the bottom quartile.

The first group might be surprised to know that **the more short-term objectives a campaign reached, the less share gain and incremental profit it realized.**





## MEDIA TRENDS

# As our attention spans shrink, every second counts.

**There's been lots of talk about the attention economy for good reason: attention is a leading indicator of action. But attention is getting harder to come by.**

Twenty years ago, the average person's attention span was two and a half minutes. Today, it's just 47 seconds<sup>2</sup>.

Advertising doesn't hold consumers' attention like it used to either, declining 37% since 2018, from 3.4 seconds to 2.2<sup>3</sup>. For advertisers, this drop is cause for alarm.

After all, how much attention consumers give to an ad directly correlates with the campaign's brand outcomes. In fact, **every extra second of attention lifts brand awareness by another 11% and recall by 7%**<sup>1</sup>.

**Attention Is  
More Important  
Than Viewability<sup>1</sup>**

**7.5x**

more important at  
driving awareness

**5.9x**

more important at  
driving recall

SOURCES: 1. [GUMGUM](#), MAR. 2022; 2. [UNIVERSITY OF CALIFORNIA](#), MAY 2023; 3. [NEURONS](#), MAR. 2025







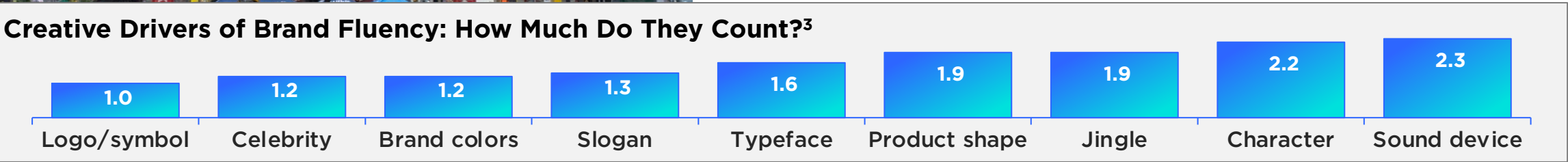
MEDIA TRENDS

# The antidote to weak attention is strong, fluent branding.

It only takes 1.7 seconds to decide whether to engage and 2.5 to form a memory, so advertising needs to work fast. Here's a simple hack: **distinctive brand assets can reduce the attention-memory threshold by a full second<sup>1</sup>.**

But what makes a brand distinctive? All distinction is not created equal, and a brand's logo is just table stakes.

Impact of Strong Branding vs. Weak	
<b>52%</b> more likely to grow brand differentiation <sup>3</sup>	<b>3.5x</b> return on investment <sup>1</sup>
<b>70%</b> more likely to grow brand distinctiveness <sup>3</sup>	<b>\$90B</b> value lost by weak branding, globally <sup>1</sup>



SOURCES: 1. [VCCP MEDIA/AMPLIFIED](#), MAY 2025; 2. [WARC](#), JULY 2022; 3. [SYSTEM1](#), JUNE 2025

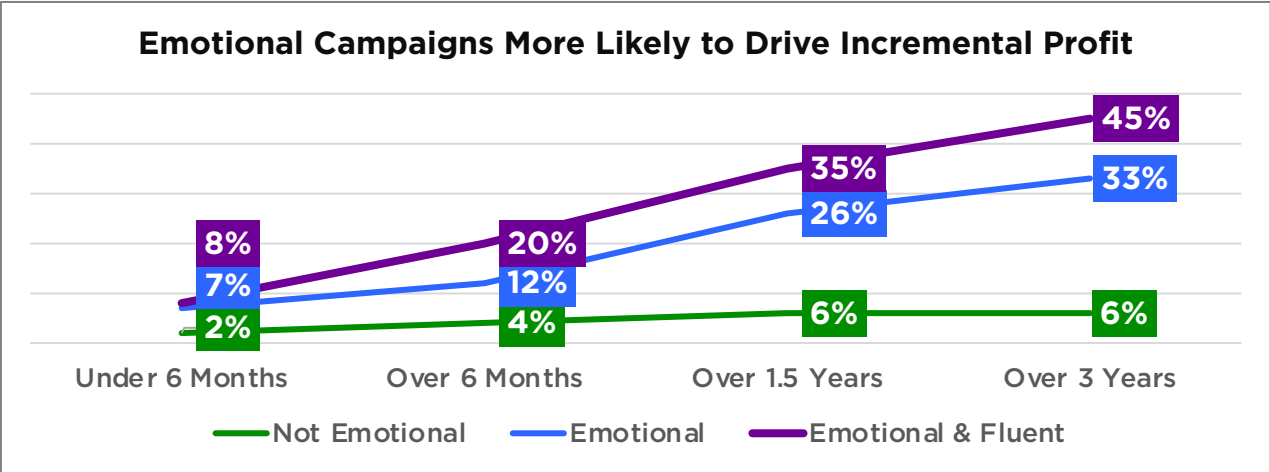


MEDIA TRENDS

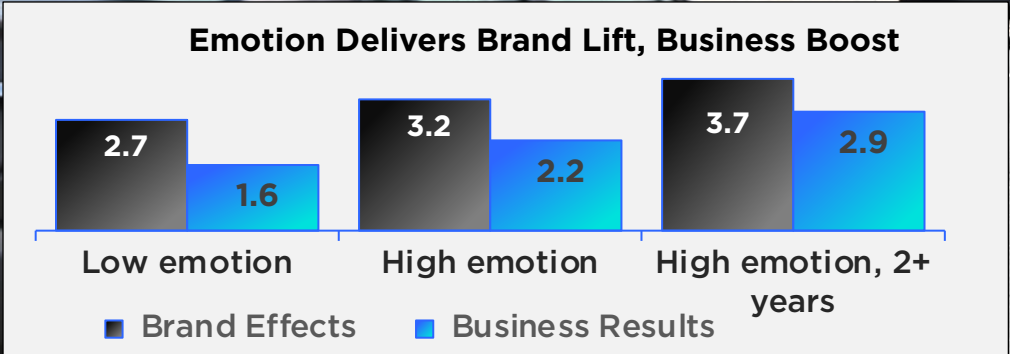
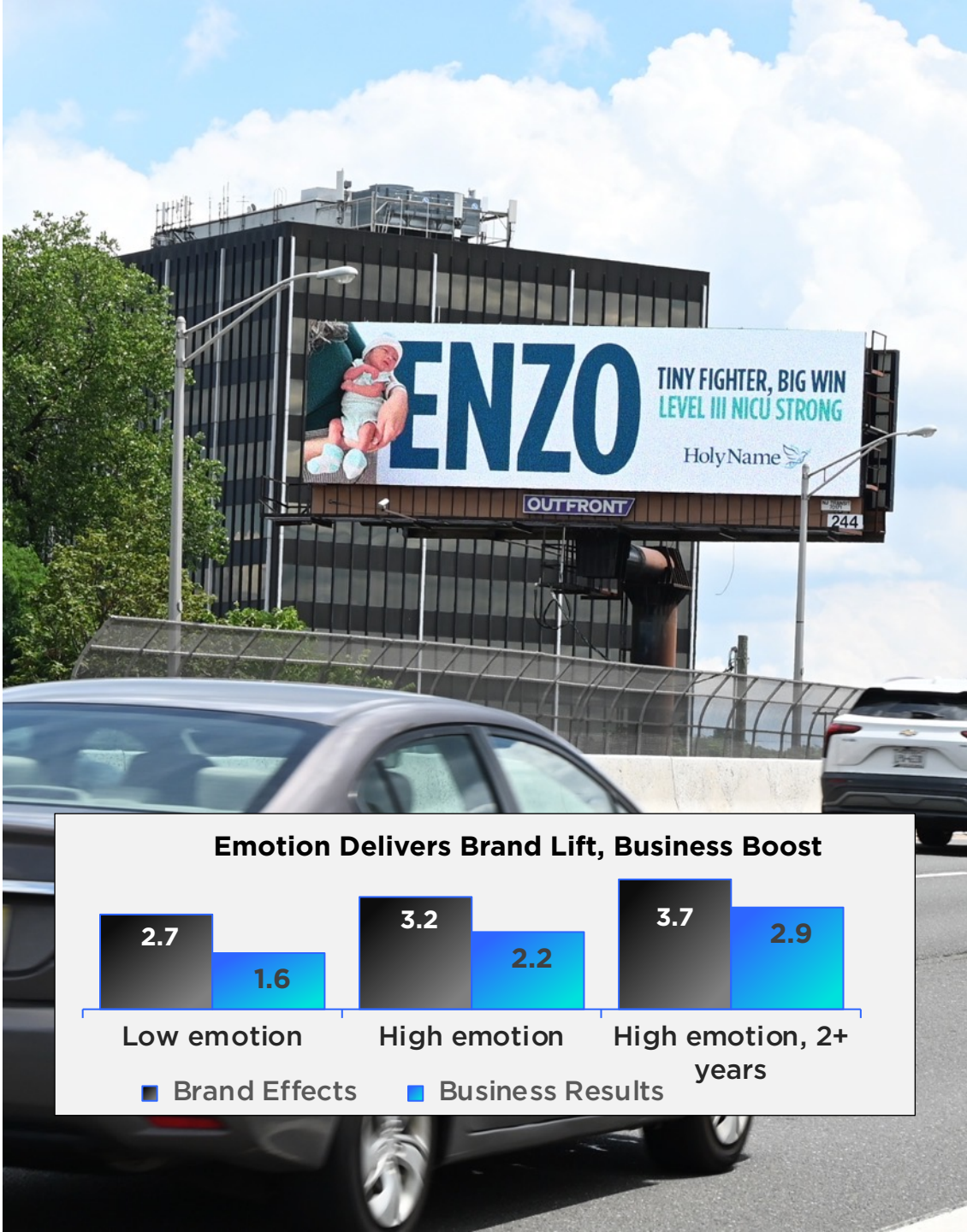
But the ultimate secret ingredient is sweet emotion.

Make someone want something and you might get a sale.  
Make someone feel something and you might get a customer.

Infusing ad campaigns with emotion can drive both an immediate 19% lift in brand effects (e.g., awareness and trust) and a 38% increase in business results (e.g., profit and market share). In campaigns of two years or more, brand effects rose by 37% and business results by 81%.



SOURCES: [SYSTEM1](#), JUNE 2025





# OUTFRONT/ OUT OF HOME TRENDS



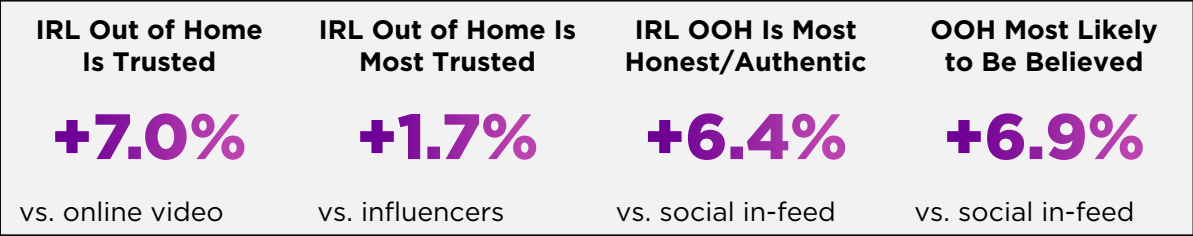
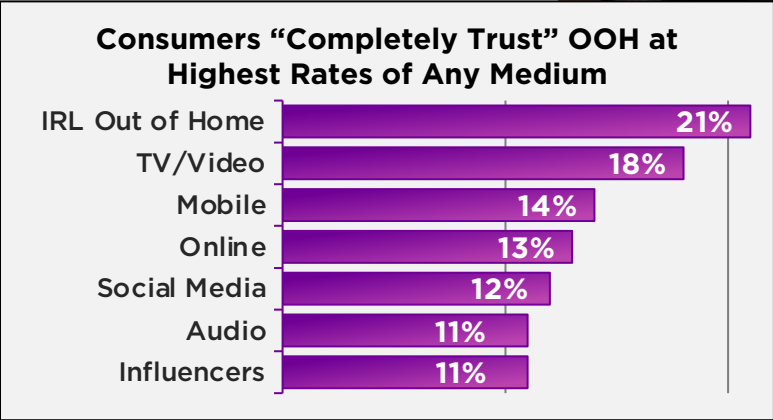
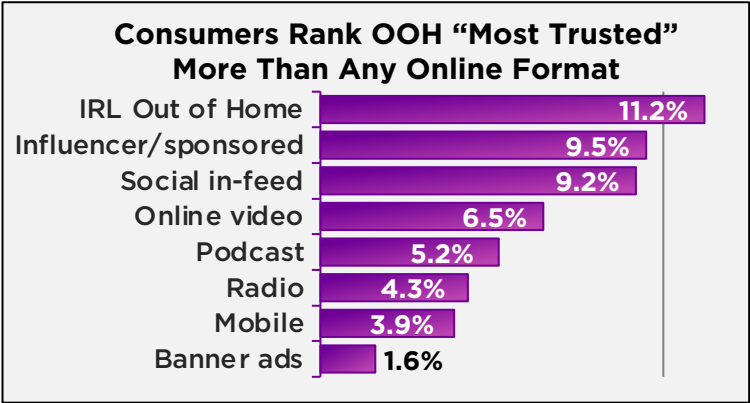


OUT OF HOME TRENDS

# IRL out of home media is more trusted than all online formats.

New research by MFour and OUTFRONT confirmed: **consumers trust IRL out of home advertising more than every online kind.** It's easy to understand why consumers today are wary of what they see online. But there's no driving past a deepfake.

So it's similarly easy to understand why out of home, in real life media clears the field. It doesn't matter how you stack up real-world OOH and online formats; consumers consistently trust OOH more.



SOURCES: MFOUR/OUTFRONT, JULY 2025;







## OUT OF HOME TRENDS

# The trustworthiness of IRL transfers to its advertisers.

**There's a flipside to the brand safety risk of social.**

It's called the halo effect, and here's what it means: **60% of consumers say they're more likely to trust a brand that advertises in a trusted media environment.**

Perhaps the single variable that most determines whether a medium is trusted or not is “**gatekeeping**” – whether the channel presents professionally controlled and curated material only (like OOH or newspapers) or if the platform amplifies user-generated content (like TikTok or YouTube). Between the two is a trust gap.

To illustrate: **consumers trust brands to deliver on their promise 37% of the time when advertised on gatekeeper media** and just 5% on non-gatekeepers.





## OUT OF HOME TRENDS

# Since consumers can't skip IRL it's least likely to be ignored.

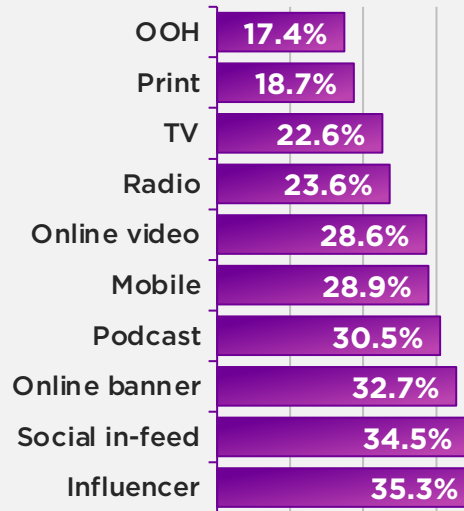
**52% of consumers now use ad blockers on their phones<sup>1</sup>. And Google's crackdown on YouTube ad blocking only increased demand for it. But there are no ad blockers in real life.**

It's a constant game of cat-and-mouse as consumers try to shield themselves from online ads while media platforms attempt to evade those defenses.

But as part of the passively-consumed environmental ambiance of a location, **there's no way to block an IRL out of home ad** – short of maybe taking a different route to work every day.

Its overall favorability is another reason people don't skip OOH – after all, it beat out every other offline format too.

### IRL OOH Least Likely to Be Ignored or Skipped<sup>2</sup>



SOURCES: 1. [CENSUSWIDE/GHOSTERY](#), MAR. 2024; 2. MFOUR/OUTFRONT, JULY 2025







## OUT OF HOME TRENDS

# OOH is more likely to secure attention and engagement than the buzziest online formats.

**While creators, podcasters, and online video may capture modern media buyers' dollars, real-life out of home outperforms them all for securing attention and inspiring engagement.**

As marketers, it's easy to get on board the hype train for the latest tactics in the shiniest new emerging online channels. But IRL out of home advertising has engaged consumers' attention since before the discovery of electricity.

Consumers are **more likely to pay attention and engage with real-world OOH** than influencer content (+1.7%), online video ads (+3.0%), or podcast advertising (+11.3%).

Perhaps it's that millennia-long head start.





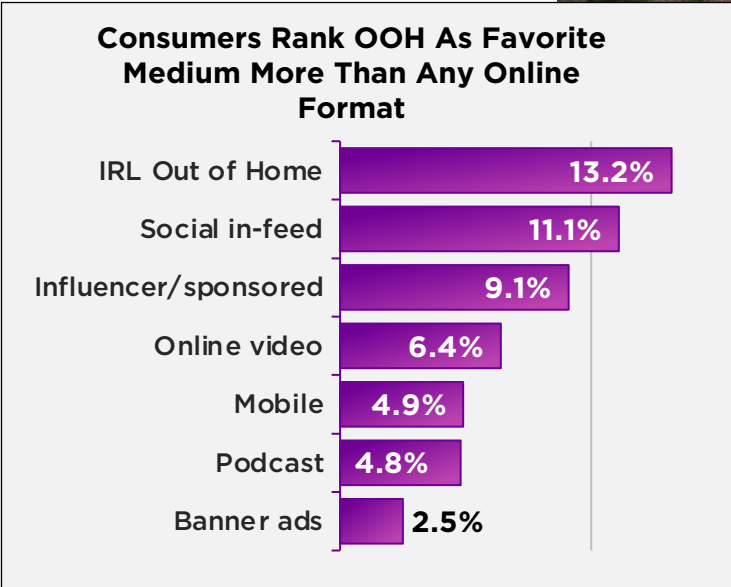
OUT OF HOME TRENDS

Consumers prefer real-world OOH over all online ad formats.

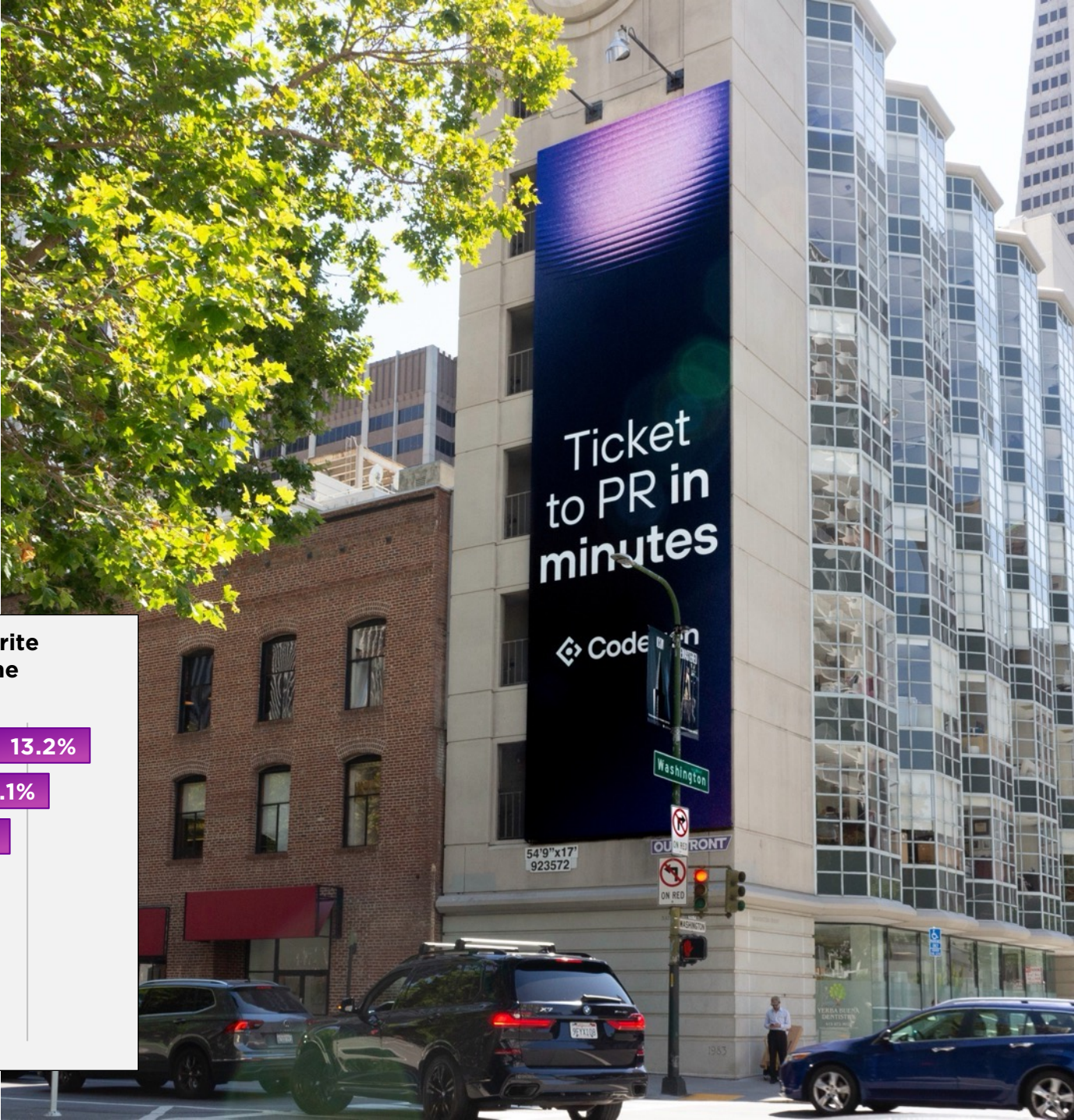
Consumers rank IRL as their favorite ad medium more frequently than they do any online format.

Pixels on a screen are a finite resource. So is attention. That means every single online ad demands an opportunity cost be paid from its audience.

That opportunity cost is reflected in consumers’ diminished affinity for online formats compared to out of home in real life, where it doesn’t have to compete for either.



SOURCE: MFOUR/OUTFRONT, JULY 2025





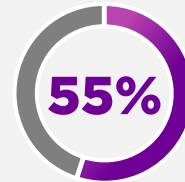


## OUT OF HOME TRENDS

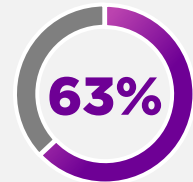
# Respect for consumers' attention is rewarded with greater brand affinity.

**Annoyed by your ad? They're annoyed with your brand.**

Consumers don't like being interrupted with advertising when they're streaming their favorite TV show, listening to the latest true crime podcast, scrolling their social feeds, or whatever else they're doing online when they encounter the ad. In fact, they kind of resent the disruption – and adjust their feelings about the advertiser accordingly.



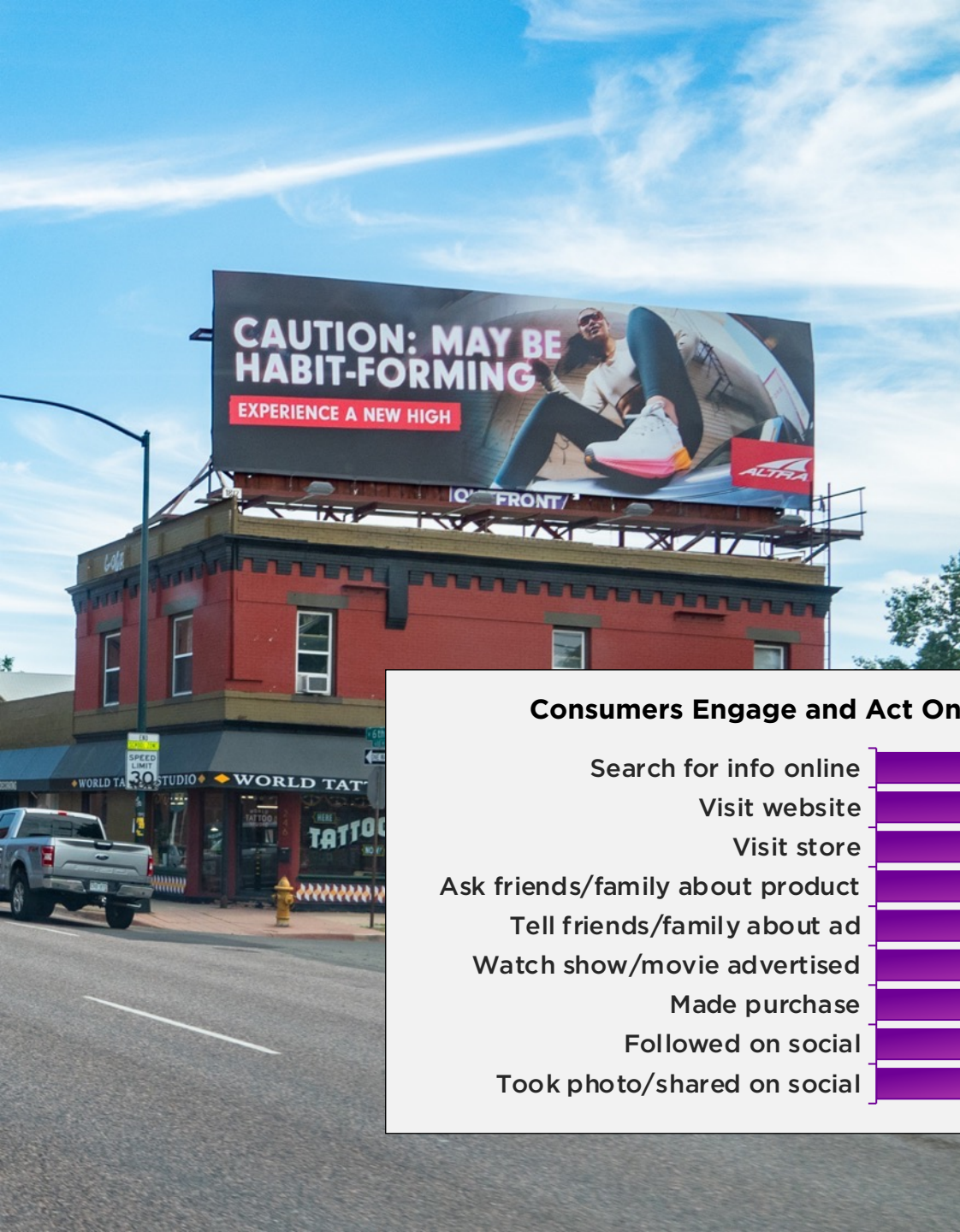
say interruptive ad formats negatively impact brand opinion<sup>1</sup>



say ad formats that don't interrupt positively impact brand opinion<sup>1</sup>







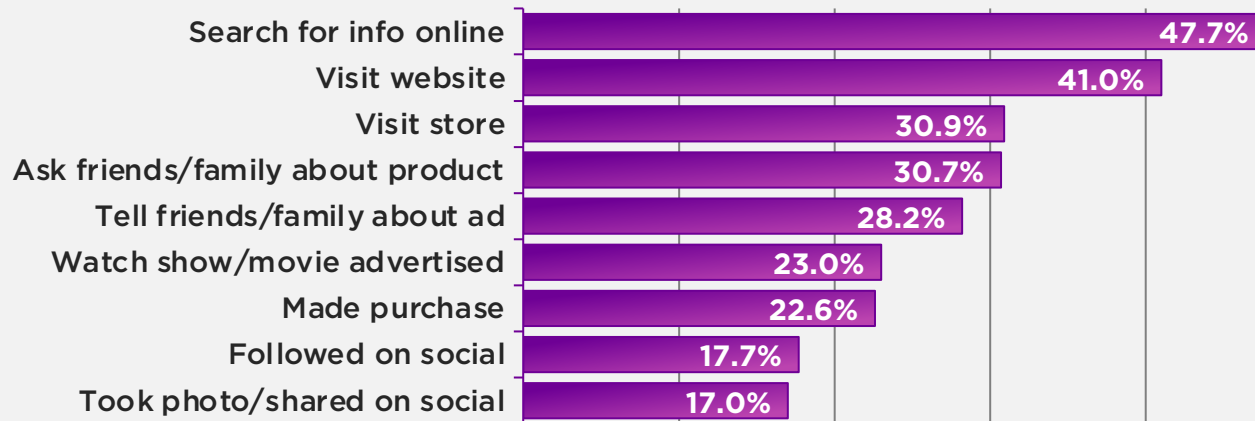
## OUT OF HOME TRENDS

# Consumers take action after seeing OOH in the real world.

**Real-world ads don't just capture attention; they transform that attention into action.**

Research has consistently demonstrated out of home's ability to drive online engagement and real-world actions alike, and our recent survey confirmed it.

### Consumers Engage and Act Online & IRL After OOH Exposure



It also confirmed once again that **IRL out of home is more than just a brand awareness medium**, also driving high rates of bottom-funnel actions such as watching the TV show or movie advertised or making a real-world visit to a brick-and-mortar location.

SOURCE: MFOUR/OUTFRONT, JULY 2025



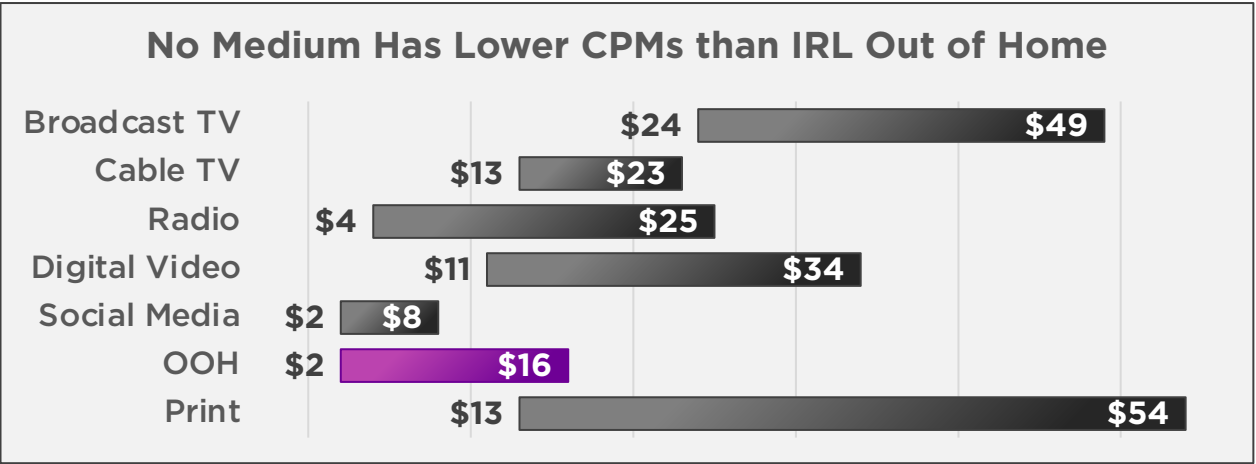


OUT OF HOME TRENDS

Affordable reach without brand risk: OOH is media's best value.

New analysis confirms that no medium has lower CPMs than IRL out of home. But that's just one reason real-world media wins.

IRL out of home media also offers a brand-safe, fraud-free environment, unlike online digital formats and CTV. With high impression quality and low CPMs, real-world advertising delivers more bang for every buck.



SOURCES: [SOLOMON PARTNERS](#), JULY 2025





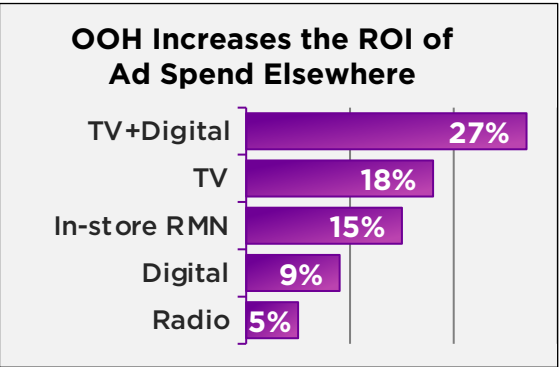
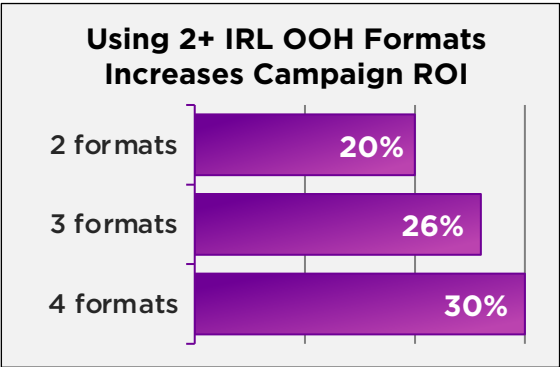
OUT OF HOME TRENDS

OOH's impact compounds ROI with other media – and itself.

Out of home is the ultimate team player, helping other mediums achieve their true potential and full return on investment.

Not only that, out of home helps unlock the full power of... out of home. **Using multiple OOH formats can increase ROI by up to 30%**; extending a campaign from two weeks to eight can improve it by 79%.

TV and digital are the channels that benefit the most – adding OOH to this pair can drive a 27% ROI lift over television alone – a bigger impact than adding print or radio.



SOURCE: [ANALYTIC PARTNERS](#), JULY 2024





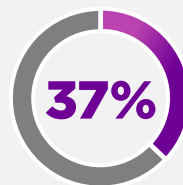


## OUT OF HOME TRENDS

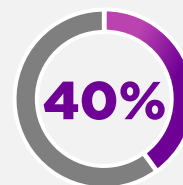
# Digital out of home is influential all the way down the funnel.

**DOOH beats out online digital formats for driving store visitation, whether e-commerce or brick-and-mortar<sup>1</sup>.**

Digital out of home is a down-funnel medium too! Surprised? You shouldn't be. DOOH campaigns have a long-lasting impact on conversion potential that rewards longer campaign flights and increased exposure, as opposed to online formats, where overexposure can result in ad fatigue<sup>2</sup>.



would visit a store as a result of seeing its DOOH<sup>1</sup>



say DOOH would encourage them to buy<sup>1</sup>





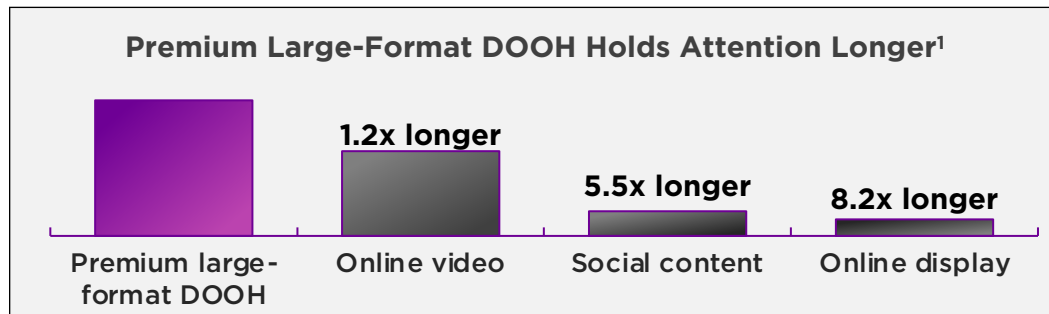
## OUT OF HOME TRENDS

# Large-format DOOH multiplies top- and bottom-funnel effects.

**Bigger isn't always better. But sometimes it is.**

Premium large-format **digital out of home** can deliver up to **5.1x more attention** and **2.5x higher brand recall** than online **digital formats**<sup>1</sup>. DOOH's 73% favorability rating doesn't hurt either<sup>2</sup>.

Compared to static content, premium large-format DOOH (like OUTFRONT's Times Square inventory) also drives 2.5x more brand choice<sup>1</sup>.



SOURCES: 1. [THE HARRIS POLL/OAAA](#), APR. 2024; 2. [LUMEN RESEARCH/OCEAN OUTDOOR](#), JUNE 2025







## OUT OF HOME TRENDS

# Augmented reality in DOOH can augment a campaign's impact.

**Campaigns powered by AR tech like OUTFRONT XTEND from our XLabs team show some of the strongest engagement KPIs.**

Augmented reality has gone from a gimmick to a strategy, with its use in real-world digital out of home campaigns driving astounding results, including **dweltimes that average 75 seconds and engagement rates up to 30%** in high-traffic locations like transit hubs and airports. To be clear: that's not the lift – that's the rate!

Combined, these data points deliver a 32% improvement in a campaign's overall effectiveness.

### AR's Impact on OOH Campaigns

**+300%**

lift in engagement rate

**+94%**

lift in conversion rate

**+45%**

lift in brand recall

**1.67x**

return on ad spend



## OUT OF HOME TRENDS

# 3D anamorphic creative is a digital out of home power-up.

Three-dimensional digital out of home creative makes a deep impact on key brand metrics, such as a 32% lift in desirability<sup>1</sup>. OUTFRONT XSCAPE from our XLabs team puts this powerful creative technology within reach.

Anamorphic out of home – the proverbial 3D billboard – has a hypnotic effect on audiences, who stop what they're doing and pay attention. 55% of the time they film the video to share with friends<sup>2</sup>.

SOURCES: 1. [LUMEN RESEARCH/OCEAN OUTDOOR](#), JUNE 2025; 2. [BCN VISUALS](#), DEC. 2024





# OUTFRONT/

