



The Return of OOH:

YOUR GUIDE FOR THE POST-COVID-19 MARKET



» THE DATA IS CLEAR

The new normal is settling in, and people are getting out. Whether walking down a city street, enjoying the great outdoors, or driving to their next destination — outside is where you'll find your audience when they're not at home. So we're convinced.

"OOH is back."

Consumers and businesses have emerged from quarantine and shelter-in-place orders, which brings along a unique set of opportunities to reach new audiences.

First, let's face the facts — average foot traffic per venue is down 15% across the U.S. compared to 2019.^[1] However, while people continue to avoid indoor public venues, and use of public transit remains low, we're actually seeing a huge uptick in recent mobility data.

In the last two weeks, above-ground foot traffic has reached levels that are even higher than before COVID-19, and these trends are expected to continue. But higher foot traffic isn't the only OOH opportunity we're seeing — cars are back on the road too, and those cars are traveling the U.S. (see Figure 1).

According to the Out of Home Advertising Association of America (OAAA), more than half of consumers plan to get away on a summer vacation, and 62% plan to travel by car — that's up 72% from last summer.^[2]

We've pulled together up-to-the-minute data to paint you a picture as you plan to reach your target audience outdoors. Cities where you can make the highest impact, business categories you'll want to pay close attention to, and the right messaging and mediums to help you stay relevant — you'll find it all here.

U.S. MOBILITY TRENDS

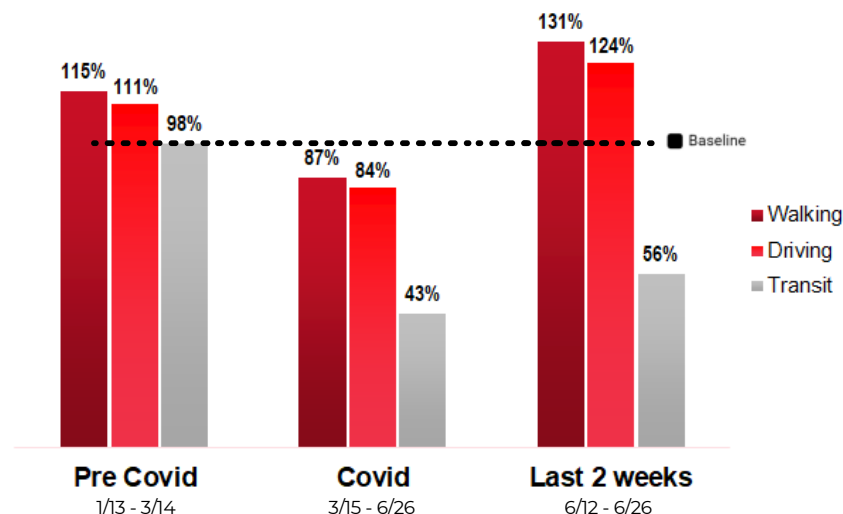


Figure 1: Apple's US Mobility Data for Walking, Driving, & Public Transit is relative to a baseline volume starting January 13th, 2020.

THIS IS YOUR OOH GUIDE IN THE POST-COVID-19 MARKET.

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» GEOGRAPHY

Consumers are out and about again, but the change in foot and vehicular traffic looks different in each city across the U.S. Here are some important trends we're seeing as the economy begins to slowly reopen.

TOP 5 BEST CITIES TO PROMOTE OOH

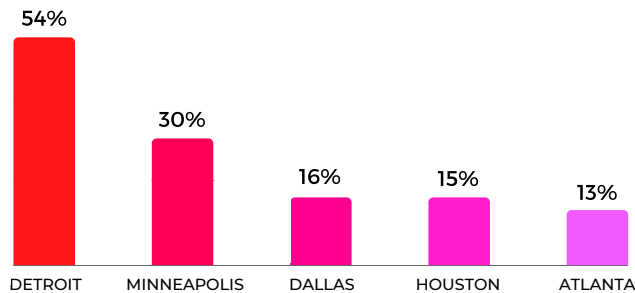


Figure 2: Cities were categorized based on data of available OOH inventory and foot traffic increase compared to Pre Covid-19 levels.

OOH AD SPEND

15%

of total U.S. OOH ad spend was deployed in these 5 cities alone during 2019 (\$8.6b total)^[3]

WORST 5 CITIES TO PROMOTE OOH

OOH AD SPEND

15%

of total U.S. OOH ad spend was deployed in NYC and SF alone during 2019.^[3] Ironically, SF is currently the most active city in terms of OOH ad spend^[4]

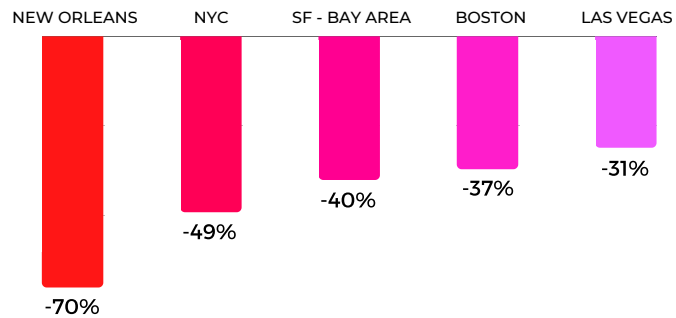


Figure 3: Cities were categorized based on data of available OOH inventory and foot traffic decrease compared to Pre Covid-19 levels.

TOP 5 CITIES WHERE BRANDS SHOULD HAVE PROMOTED OOH DURING PEAK OF COVID-19

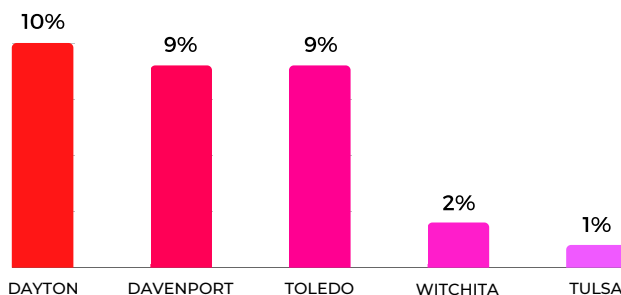


Figure 4: Cities were categorized based on data of available OOH inventory and foot traffic increase during Peak Covid-19 levels compared to Pre Covid-19 levels.

OOH AD SPEND

\$900M+

total OOH ad spend were deployed in these 5 cities alone during 2019^[3]

AUDIENCE

Foot traffic to venues across the U.S. gives us a unique perspective into our audience interests. What thrived, what nose-dived, and where we're seeing the fastest recovery — let's take a look.

TOP 5 FASTEST RECOVERING BUSINESS CATEGORIES

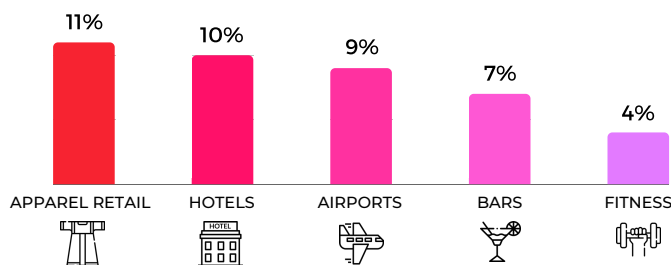


Figure 5: Business categories are based on foot traffic increase to venues across the U.S. compared to Pre Covid-19 levels.



Shopping, traveling, and socializing are top-of-mind as state and local officials reopen their economies in phases

WORST 5 CATEGORIES TO ENGAGE WITH RIGHT NOW

Health concerns are expected to continue impacting public transit, major events, and office use for several quarters across the U.S.

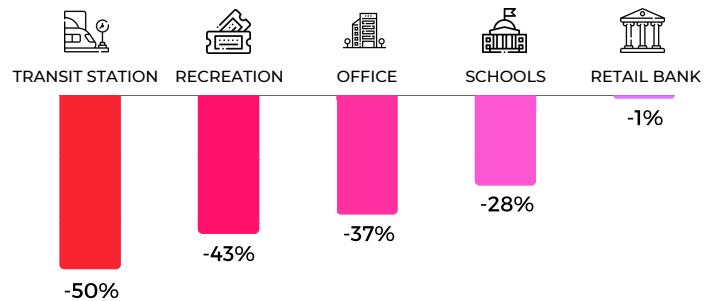


Figure 6: Business categories are based on foot traffic decrease to venues across the U.S. compared to Pre Covid-19 levels.

TOP 5 BUSINESS CATEGORIES THAT THRIVED DURING PEAK OF COVID-19

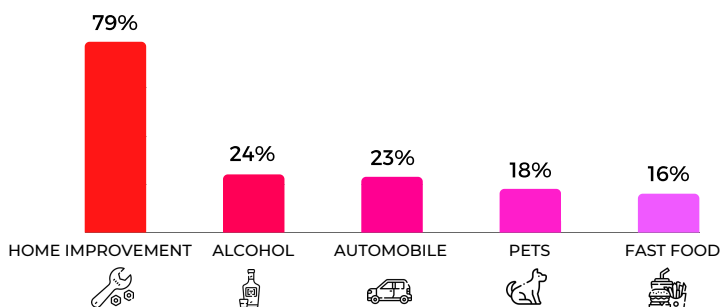


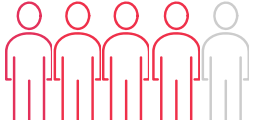





Figure 7: Business categories are based on foot traffic increase to venues across the U.S. during Peak Covid-19 levels compared to Pre Covid-19 levels.



Work-from-home orders gave homeowners more time to upgrade their house and stock up on alcohol (very essential) compared to normal

» SCORECARD

Geography and audience are key components of a successful OOH strategy, but your medium (viewability) also plays an important role, especially in this post-COVID-19 environment. The current trends in U.S. mobility data provides a clear picture to which OOH mediums are going give you the best ROI.

MEDIUM	FACTS	REACH
Billboards	+24% and +31% rise in U.S. foot and vehicular traffic, respectively, since arrival of COVID-19 ^[1]	
Public Transit	-74% decrease in subway and bus ridership compared to 2019 ^[5]	
Bus Bench/Shelter	-74% decrease in subway and bus ridership compared to 2019 ^[5]	
Taxi Top	6x smaller ad size compared to rideshare vehicle wraps	
Micromobility	+30% increase in eBike and eScooter ridership in major cities since arrival of COVID-19 ^[6]	
Vehicle Wraps	+26% and +12% increase MoM in Uber and Lyft ridership, respectively ^[7,8]	



» MESSAGING

Messaging can make or break your OOH campaign, and during difficult times, this rings even more true. According to a recent survey from Kantar, 77% of respondents said they wanted advertising to, “talk about how the brand is helpful in the new everyday life,” and 75% said it should “inform about [the brand’s] efforts to face the situation.” To be successful, messaging must be timely, relevant, and sensitive to current events — think brand recognition over pushing sales.

HERE'S OUR TOP 5 TIPS FOR RELEVANT AND CREATIVE MESSAGING

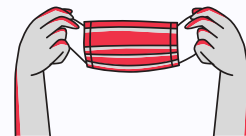
PRACTICE AUTHENTIC EMPATHY

During times like these, consumers are sensitive and even adverse to intrusive sales pushes. Instead, favor passive brand recognition over customer acquisition or sales.



EMPHASIZE HEALTH AND SAFETY

Health and safety are on the forefront of everyone's minds. Campaign messaging that recognizes and encourages consumers to stay healthy, stay active, or keep their distance goes a long way.



SPEAK TO THE NEW NORMAL

Consumers want to be reminded that even though we're in a new normal, much of our everyday lives remain the same. Providing stability and helping consumers equalize in this new environment is a great forward-looking stance.



SUPPORT YOUR LOCAL COMMUNITY

Doing more to support the local community during difficult times and sharing your story is one of the most effective ways to build your brand reputation and engage with consumers.



PROMOTE WORK-FROM-HOME SOLUTIONS

Productivity and innovation can only thrive when a workforce feels safe and secure. Whether your brand is promoting a product or service, tailoring your call-to-action for someone's household will put you ahead of the curve.



» PERFORMANCE OUTDOOR



mobilads connects brands with millions of consumers through rideshare vehicles.

We're the only advertising platform that combines Outdoor Advertising with Connected TV and turns it into a performance marketing channel. We precisely target digital audiences on streaming TV who saw an OOH ad in real life, and measure performance against user-defined conversion events - all trackable in Google Analytics.

We call it Performance Outdoor.

IMPRESSIONS

+500M

impressions served nationwide over the last 12 months

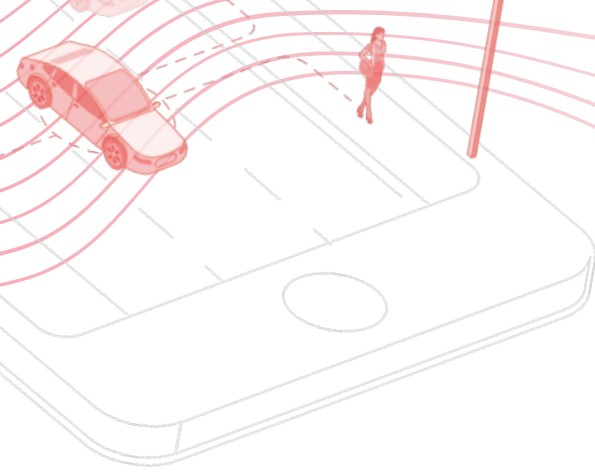
CLIENT RENEWAL RATE

89%

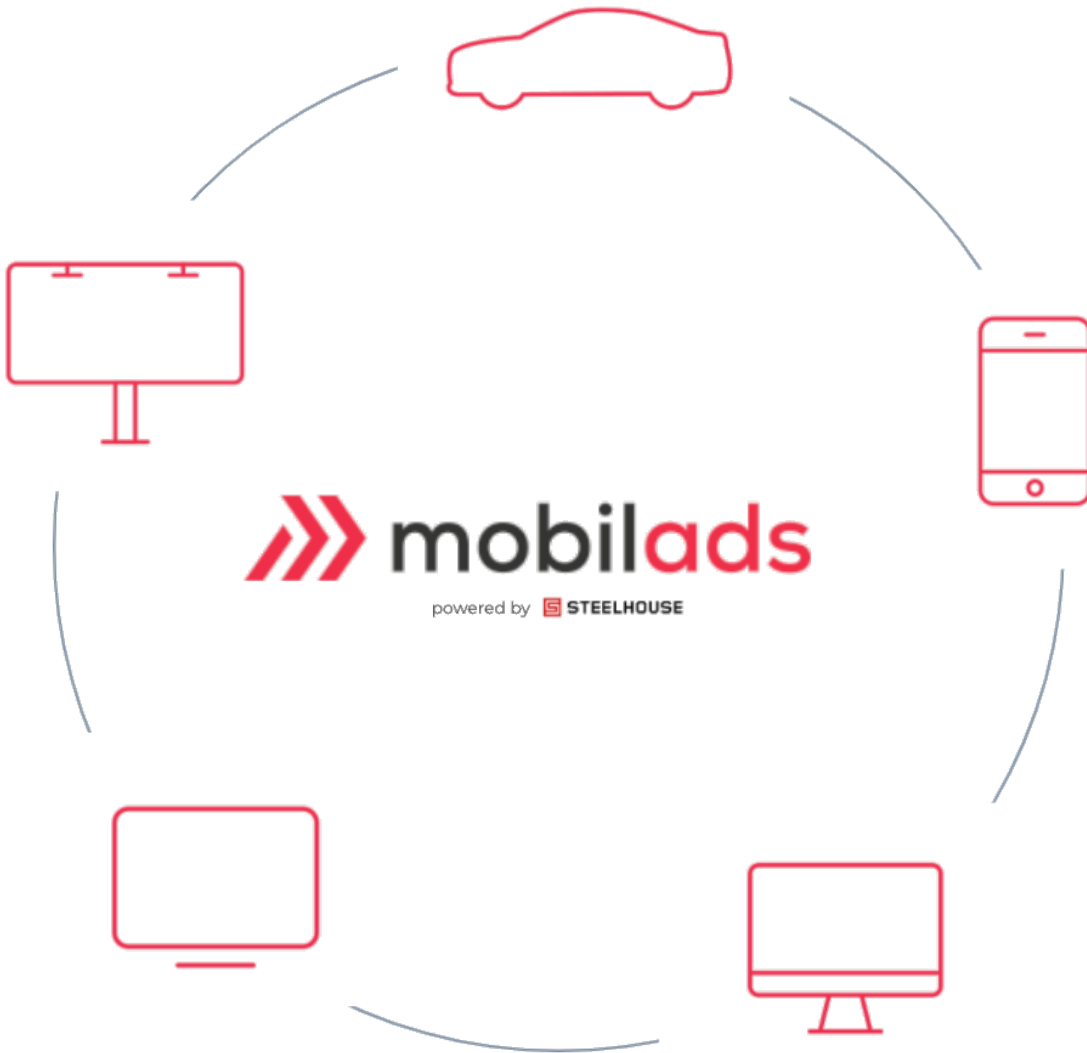
of mobilads clients renew within 6 months

BRANDS THAT TRUST US





LET'S TALK.
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» SOURCES

[Figure 1, 2, 3, 4] Apple Mobility Data, June 2020 "[Mobility Trends Report](#)"

[Figure 5, 6, 7] Foursquare, June 2020 "[Foursquare Recovery Index](#)" and Google, June 2020 "[COVID-19 Community Mobility Report](#)"

[1] Unacast, June 2020 "[Covid-19 Retail Impact Scoreboard](#)"

[2] OAAA, June 2020 "2020 Consumer Summer Vacation Plans Survey"

[3] OAAA, 2019 "[US OUT OF HOME ADVERTISING UP 7.0% TO RECORD \\$8.6 BILLION IN 2019](#)"

[4] Adquick, June 2020

[5] NY Times "[Can 8 Million Daily Riders Be Lured Back to NY Mass Transit?](#)"

[6] Lime, June 2020 "[Micromobility in the Post-Covid Age](#)"

[7] Biz Journal, Lyft, May 2020, "[Lyft soars 12% on lift in ridership in May](#)"

[8] [pymnts.com](#), Uber, May 2020, "[Uber Rides Increase As Quarantines End](#)"