



Out of Home Advertising Association of America

Political Primer: OOH Delivers Value and Effectiveness

Political Advertising is Different

OOH Proof Points for Political & Advocacy

2023 Political Preview & Opportunities

OOH Political Case Studies

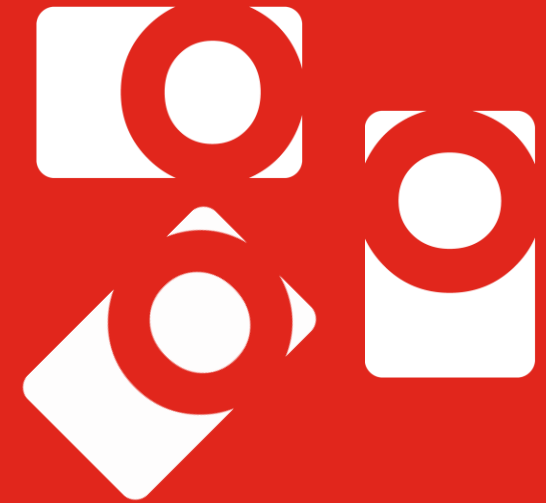
Political Agencies and Organization Contact List

APPENDIX

- OOH Political & Advocacy Ad Examples
- Voter Trend Statistics
- Creative & Media Planning Resources



Political Advertising Is Different



How is Political Advertising Different?

	POLITICAL ADVERTISING
CAMPAIGN TIMING	Highly seasonal, ads up immediately, instantaneous changes
OVERALL BUDGET	Typically not shared, historically heavy TV, digital now competing
PLANNING	Can be up to two years in advance
AVAILS	Typically not
DECISION MAKERS	Many
CONTENT	Can be highly controversial
CLIENT SERVICE	Need to maintain ongoing relationship, not an every two or four year game

Political Ad Landscape – A Multitude of Players



What's Important to Political Ad Decision Makers?

TARGETING

Seeking precise audience delivery, fact-based approach required

- Specific demographics (e.g. *working mothers with no college education*)
- Specific geography (e.g. *voting districts*)

SPEED

Need to implement and change quickly (*digital has an advantage*)

CREATIVE

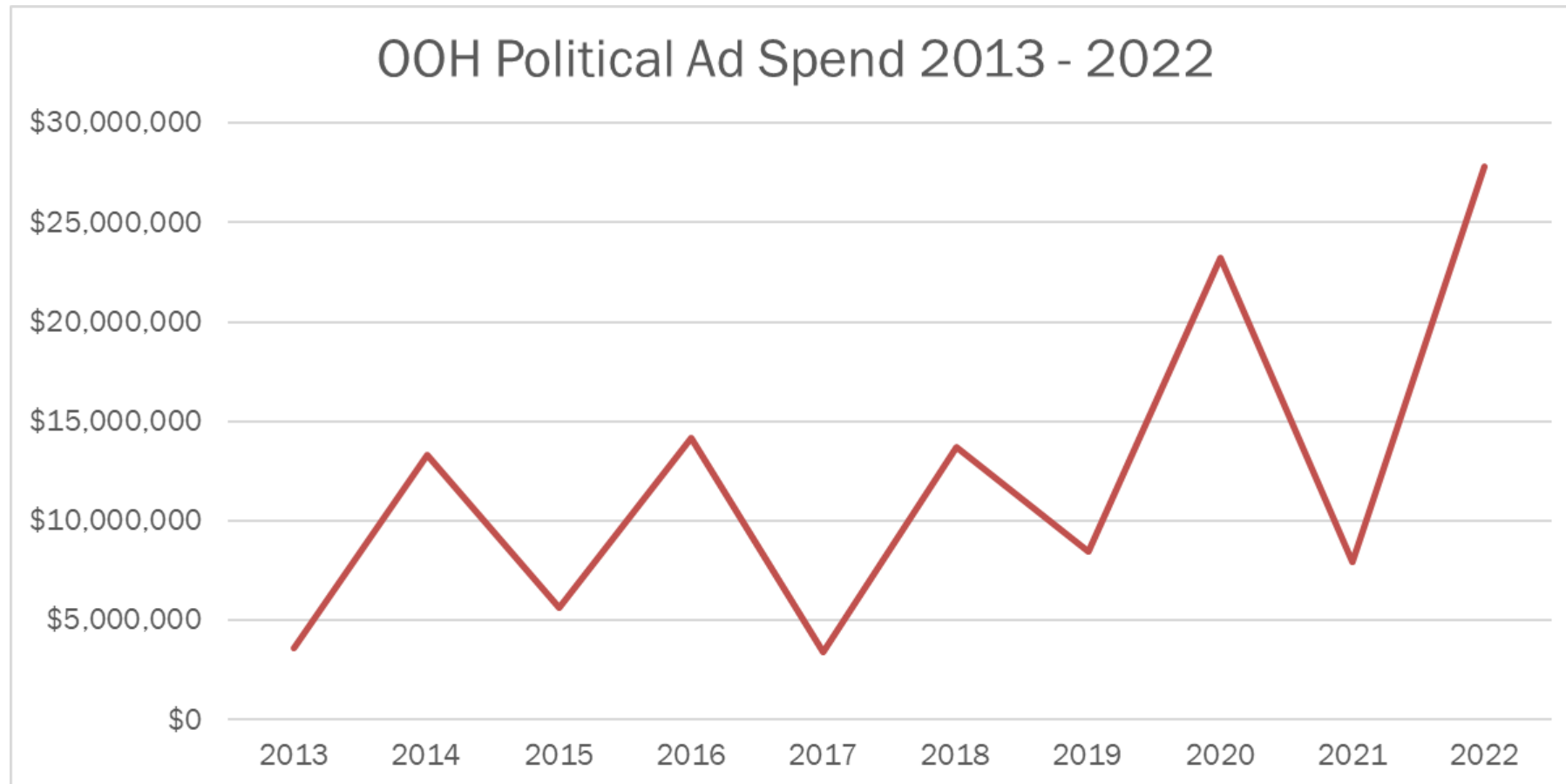
Relevance to the target audience

(e.g. *healthcare messages surrounding area hospitals*)

INFRASTRUCTURE

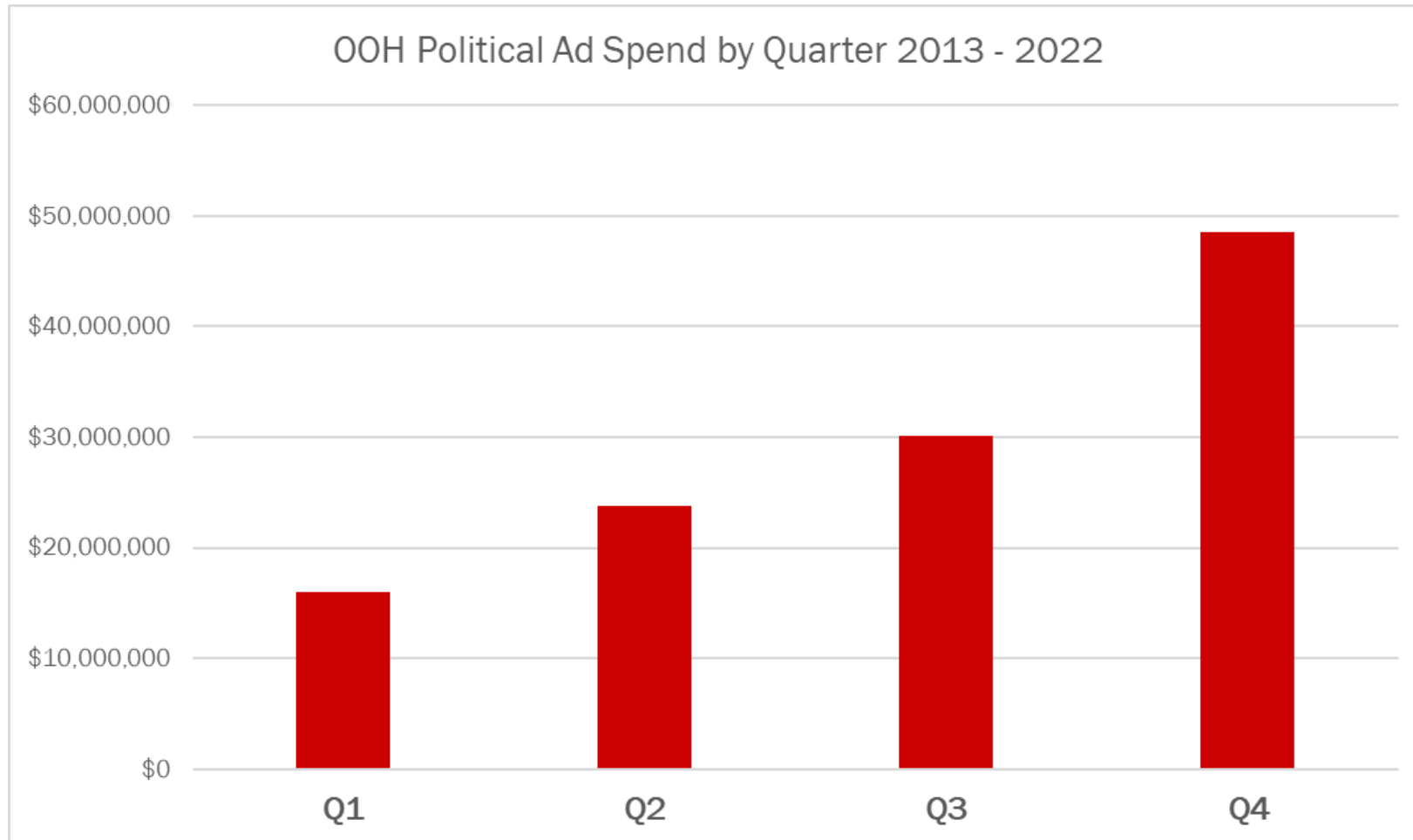
Ability to execute quickly and seamlessly, very small margin for error.

OOH Political Ad Spend: A Growth Category



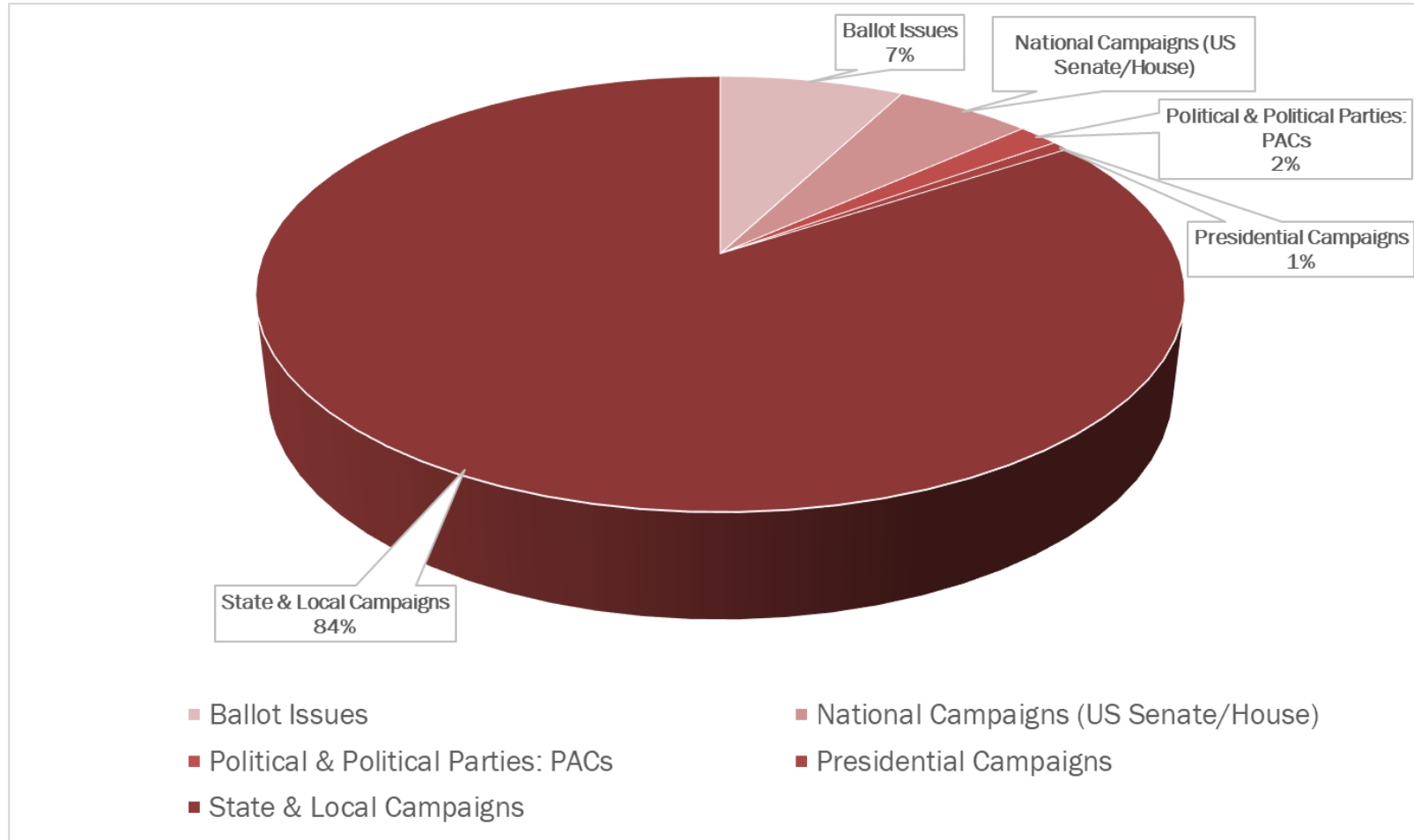
Source: Vivvix

OOH Political Ad Spend: 66% Occurs in Second Half



Source: Vivvix

Almost 85% of OOH Political Ad Spend is Locally Driven



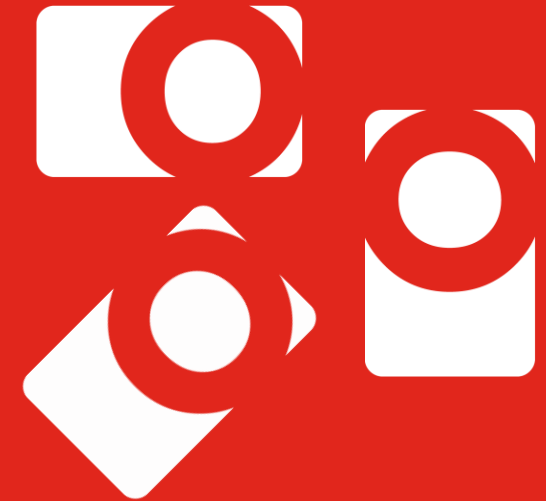
OOH Political Ad Spend by Category Type 2013- 2022

Source: Vivvix

Political Rate Considerations for Candidate Campaigns

- OOH companies must charge equivalent rates for political candidate campaigns. This rate consistency applies for all political candidates across all parties, and to federal, state or local races.
- The rate equivalency should be based on the overall audience impression delivery cost (CPM). The rate does not have to be the exact same for each OOH piece of inventory, because audience delivery and cost vary by location. However, the overall CPM for the buy needs to be equivalent across candidate campaigns.
- OOH media companies are free to set the actual campaign rate (CPM) as they choose, but it must be the same for all candidate campaigns. OOH has no FEC legal obligation to give political advertisers the lowest rate, as there is with other federally-licensed media (TV, radio, etc).
- These restrictions apply only to political candidates. They do not apply to issue/advocacy advertising and OOH companies can charge whatever rate they deem appropriate.
- With programmatic OOH, as long as the OOH media company is not offering preferential treatment to any candidate or campaign, they are in compliance. In an open exchange, the OOH media company does not have the ability to control which bids are accepted or rejected, because it is blinded and therefore considered compliant. The OOH media company can still accept or reject the creative, but that is post-auction and after the pricing has been set.

OOH Proof Points For Political & Advocacy



Top Ten OOH Benefits For Political Advertisers:

ALWAYS ON – BREAKSTHROUGH CLUTTER

- Cannot be delayed, skipped, turned off, or cord-cut, and produces the highest levels of ad recall.

BUILDS AWARENESS & BRANDING/NAME ID

- Builds awareness rapidly with BIG larger than life, bold impact. Strong potential to create conversation and controversy leading to additional exposure on social media and other free media, significantly magnifying audience impressions.

AMPLIFICATION & VALUE

- Nine in 10 adults have seen an OOH ad in the past month and 85% of US adult OOH ad viewers find them useful.
- Improves all media investments by increasing the reach of all channels, including TV and digital. Pure ad play, no programming or editorial content, so not disrupted by audience fragmentation like other media. Offers some of the lowest CPMs, the highest ad recall, and billboards are ranked #1 in consumer ad favorability.

TARGETING

- Targetability by geographic location, key demographics or consumer interests with OOH ratings and technology.

SPEED AND FLEXIBILITY

- Digital OOH offers instantaneous updating of message, and ability to make changes as much as needed.

Source: The Harris Poll, Solomon Partners, Wall Street Research

Top Ten OOH Benefits For Political Advertisers:

ENHANCES DIGITAL

- Increases ROI for search advertising by 40%, and more efficient at driving online activation than all media, including banner ads.

MOBILE & SOCIAL ENGAGEMENT

- Nearly 80% of viewers have recently engaged with an OOH ad
- 76% of US adults have taken an action on their mobile device after a recent OOH ad exposure and 51% of those actions were online search
- Over two-thirds of Gen Z and Millennials have seen OOH ads reposted in their social media feeds (65% TikTok, 64% Facebook, 62% Instagram)

REACHES HIGH PROPENSITY VOTERS

- Over indexes with some of the most likely voters - adults 25-54, HHI \$100K+, those with advanced degrees.

REACHES DIVERSE VOTERS

- OOH reaches voting minority blocs – over indexes with Black and Hispanic Americans.

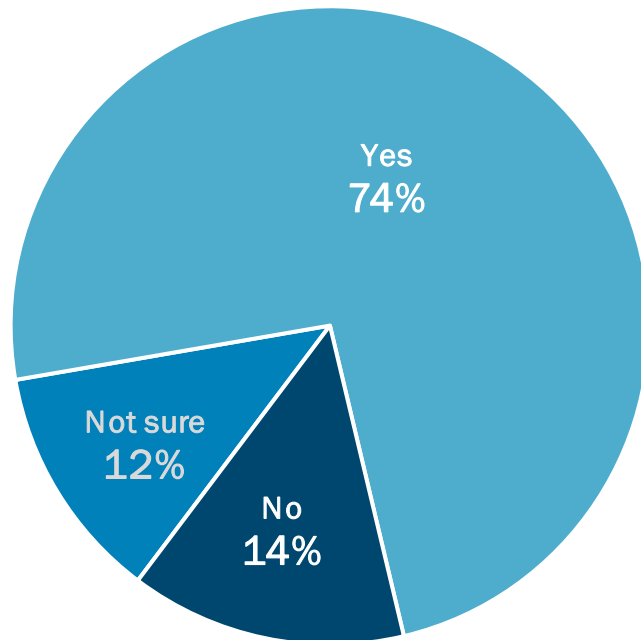
REACHES YOUNG VOTERS

- Adults 18 – 34 are the segment most heavily engaged with OOH media.

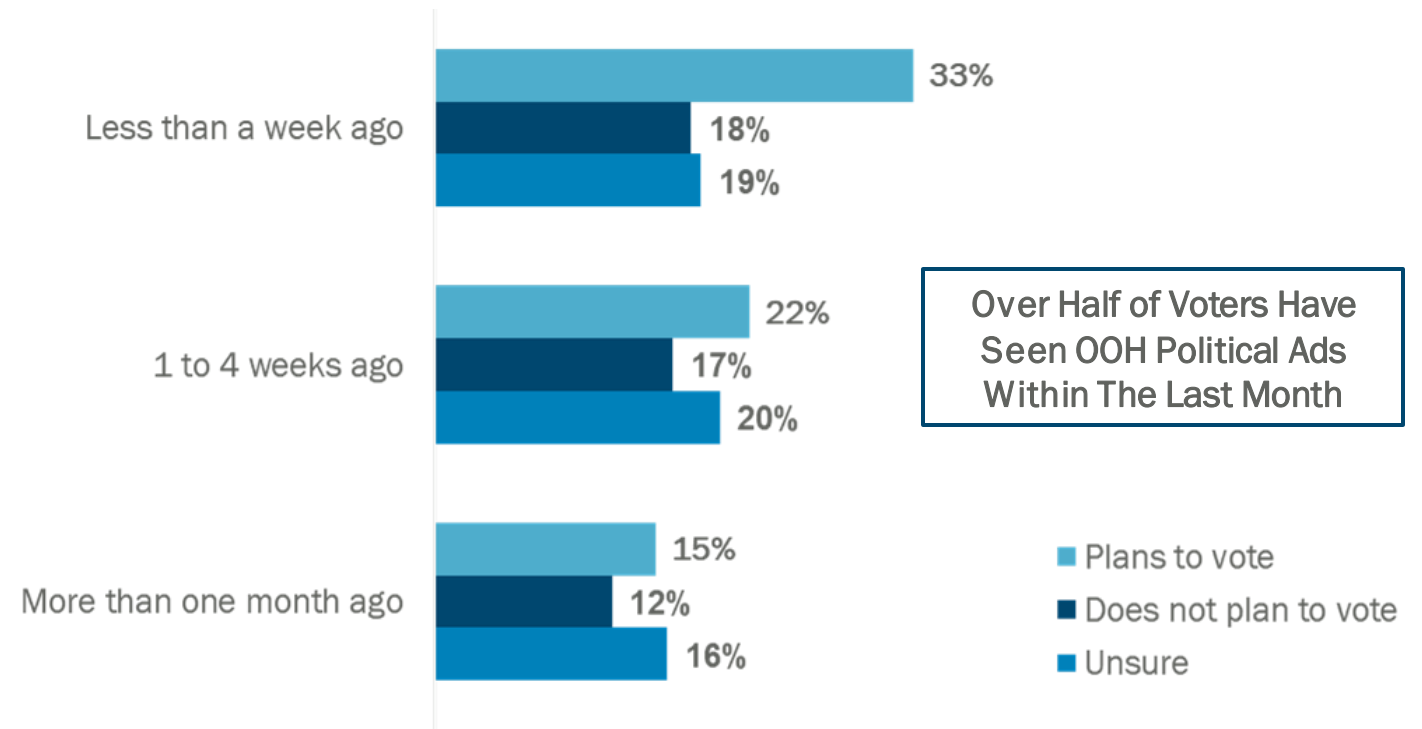
Source: The Harris Poll

Voters Are Hyper-Aware of OOH Political Ads Compared to Non-Voters

Do you plan to vote in the midterm primaries or general elections in 2022?



When was the last time you noticed a political advertisement on a billboard, bus or bus stop, outdoor video screen, poster and other outdoor signage?

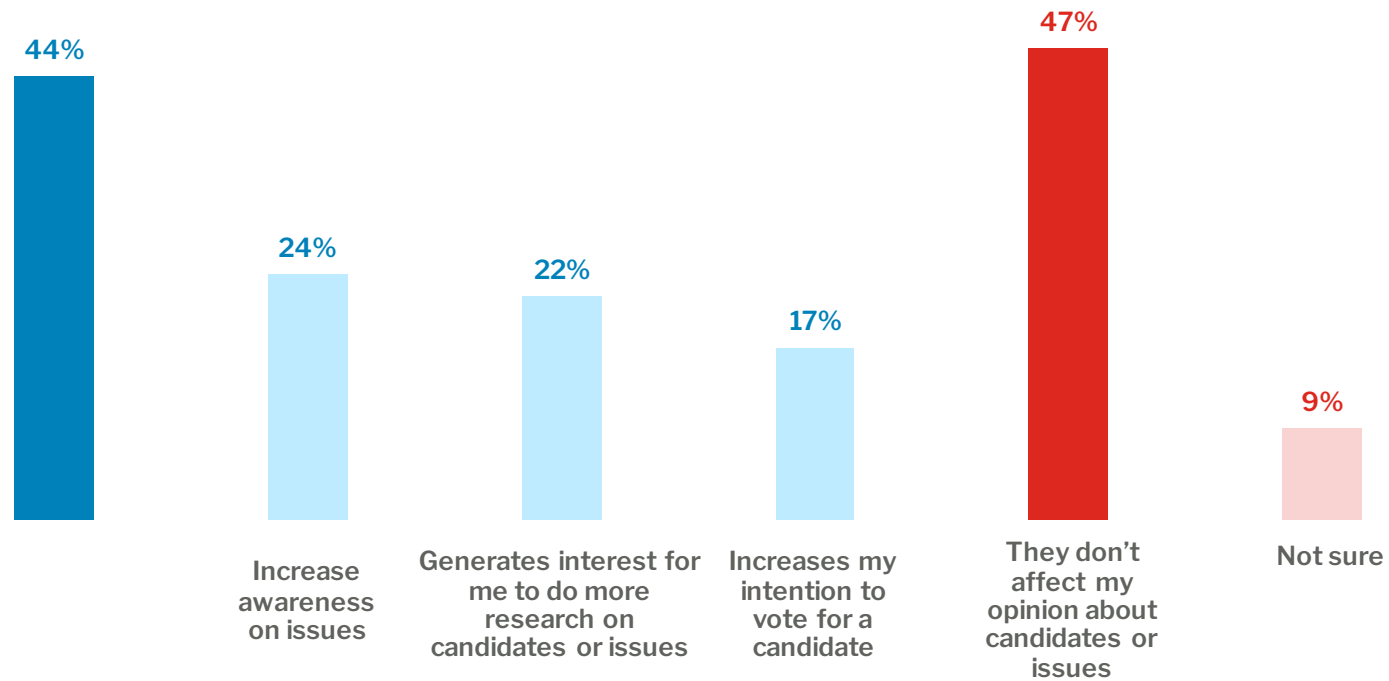


Source: The Harris Poll

OOH Political Ads Influence Voters, Especially Younger Ones

Young Americans influenced by OOH political ads

64% Gen Z | 63% Millennials
(vs. 41% Gen X and 24% Boomers+)



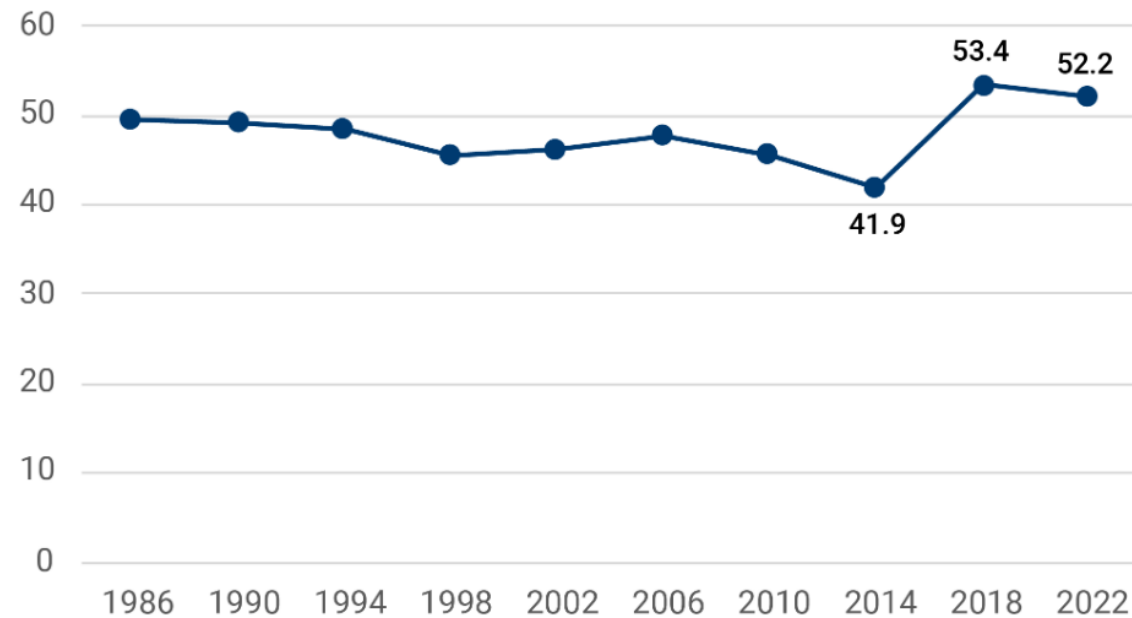
How do political advertisements affect your opinion about candidates or issues? Please select all that apply.

Source: The Harris Poll

US Consumers Voted in Record Numbers in 2020 Elections

U.S. turnout rates: Midterm elections

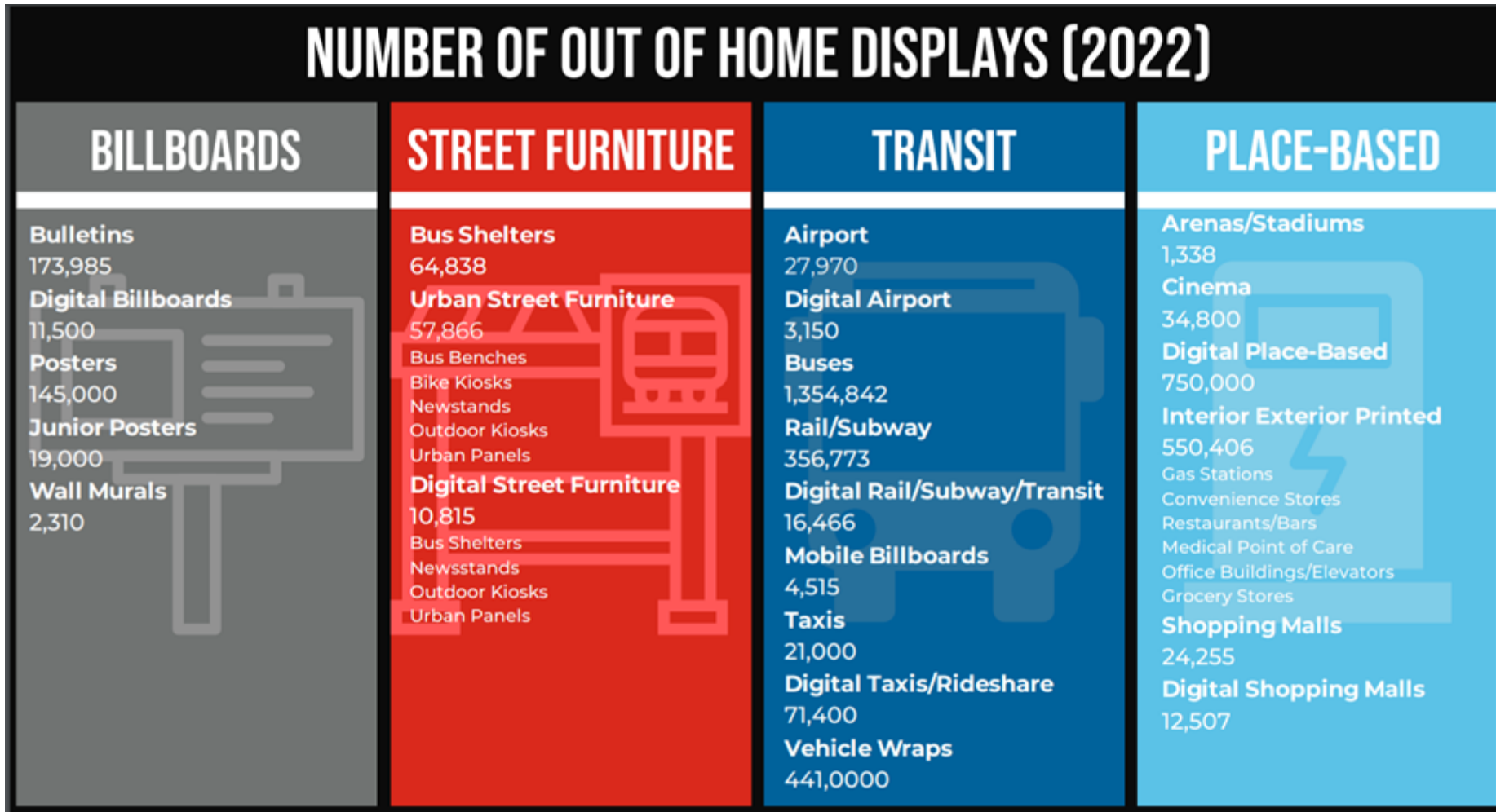
1986-2022*



- Total US voter turnout of **52.2%** in 2022 was second highest midterm turnout in four decades.
- Eligible voter registration hit a 22-year high at **69.1%**

Source: US Census Bureau, Brookings Institution

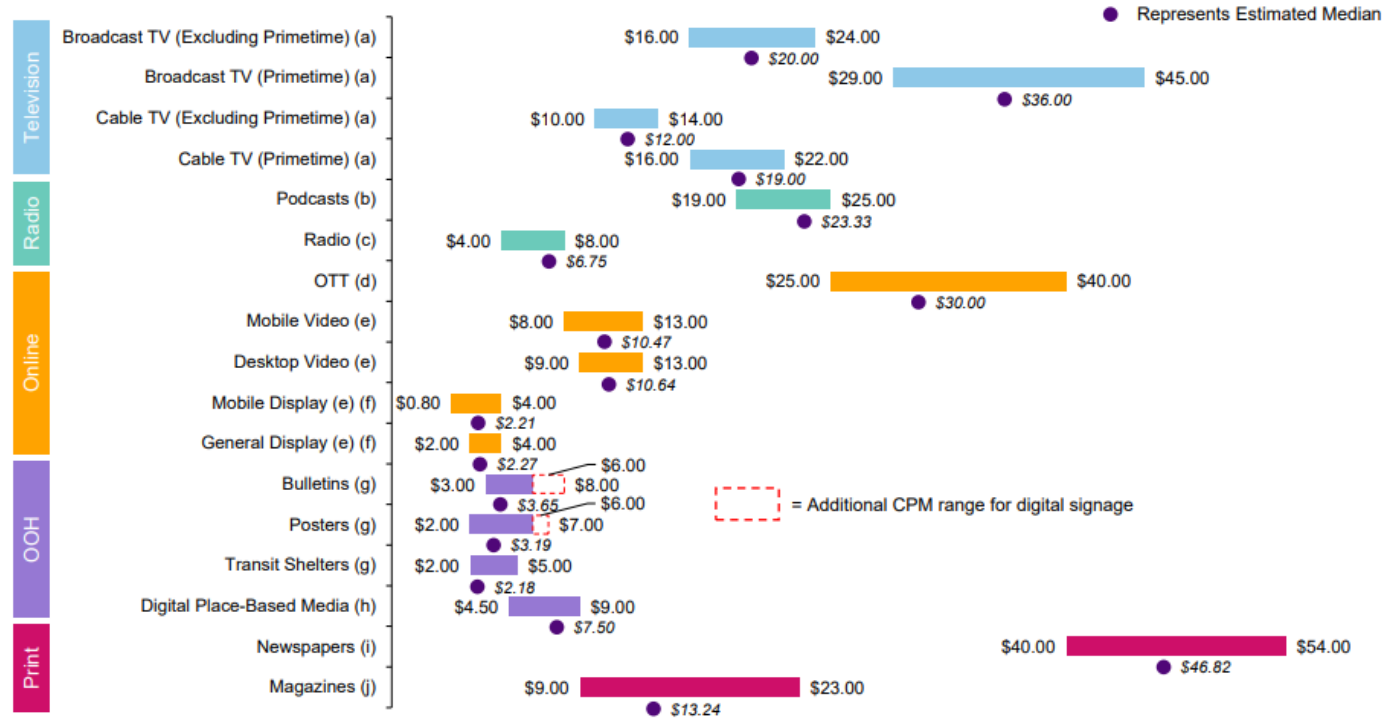
OOH Formats: Connect with Consumers Throughout their Day



OOH: Broad Reach Offers Highly Competitive CPM Value



Solomon's US Major Media CPM Comparison

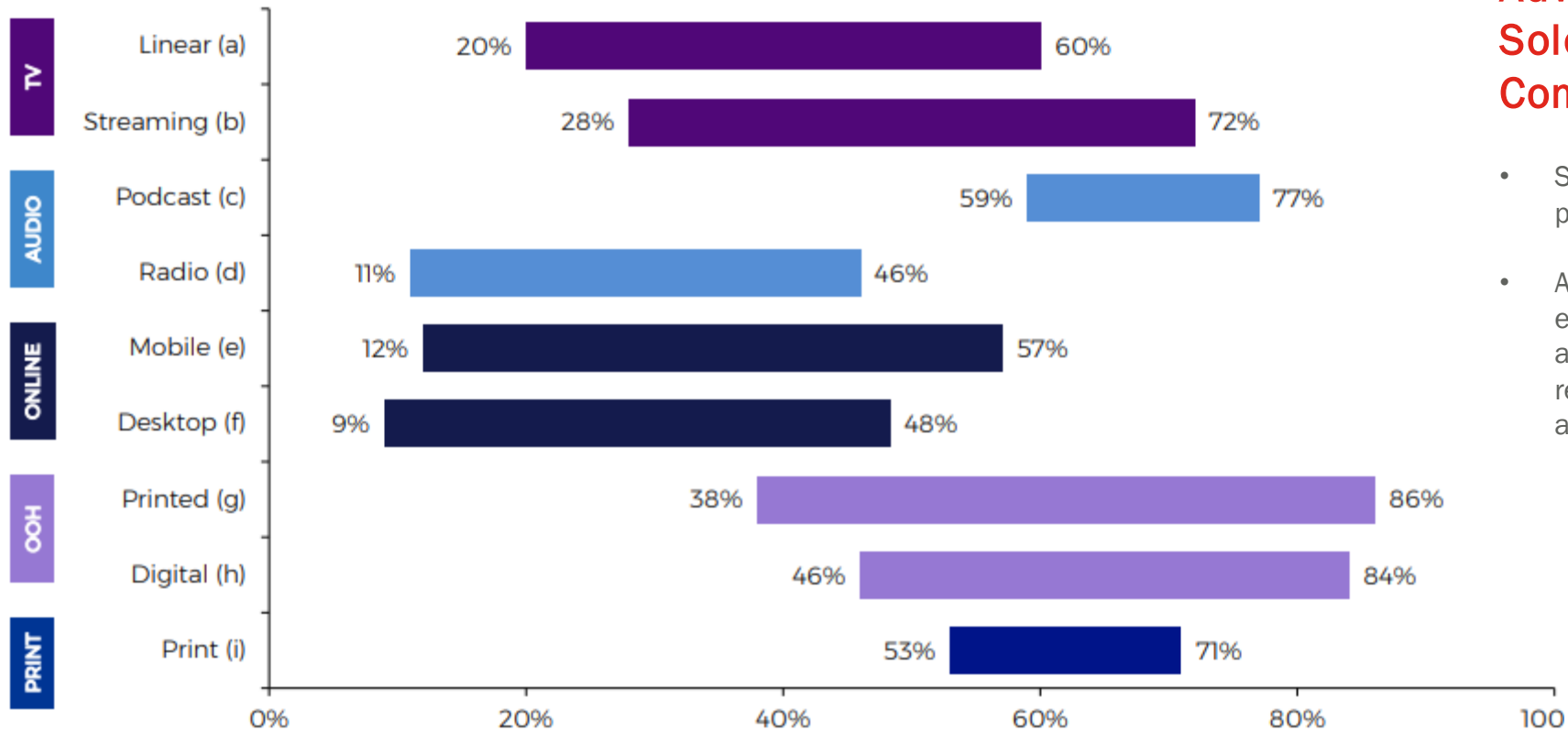


Source: Solomon Partners Estimates as of January 2022 based on SEC filings, news, research and other industry sources.

- a) 30-second advertisement.
- b) 60-second advertisement.
- c) 30-second advertisement. Includes both spot and network.
- d) Dataset includes various network and subscription streaming services.
- e) Represents data from 2018. Mobile dataset includes mobile web, phone and tablet for both Android and iPhone.
- f) 300x250 banner ads.
- g) Calculated using SQAD reporting from OOH media companies.
- h) Represents a range of average realized direct and programmatic rates on various on-premise media / place-based digital networks.
- i) 1/2 page ad. Calculated using estimated readership.
- j) Full-page color ad. Calculated using estimated readership.

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OOH Produces the Highest Ad Recall



Advertising Effectiveness: Solomon Partners Ad Recall Comparison Analysis

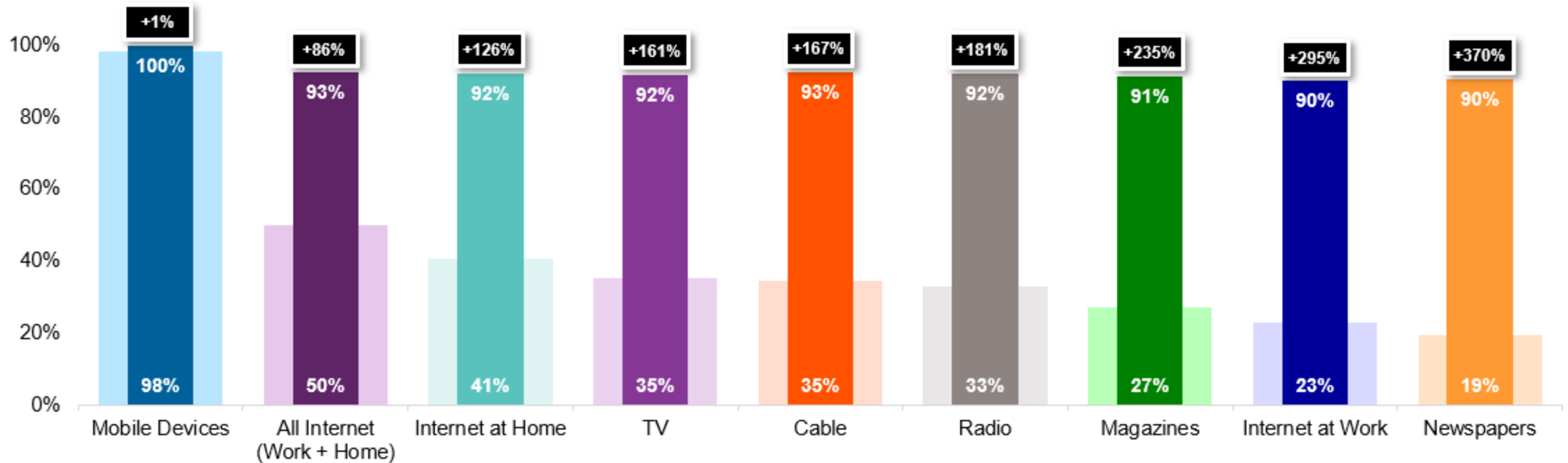
- Solomon Partners independent study of the five primary advertising channels
- Advertising recall defined as advertising effectiveness in which respondents were exposed to an advertisement and then at a later point in time, respondents were asked if they remembered the advertisement on an aided or unaided basis

Source: Solomon Partners Analysis 2022

OOH Amplifies All Media Investments

Increases the reach of all media channels to 90% or more

Total Reach: Heavy Consumers of Other Media + Any OOH
Sorted by Volume



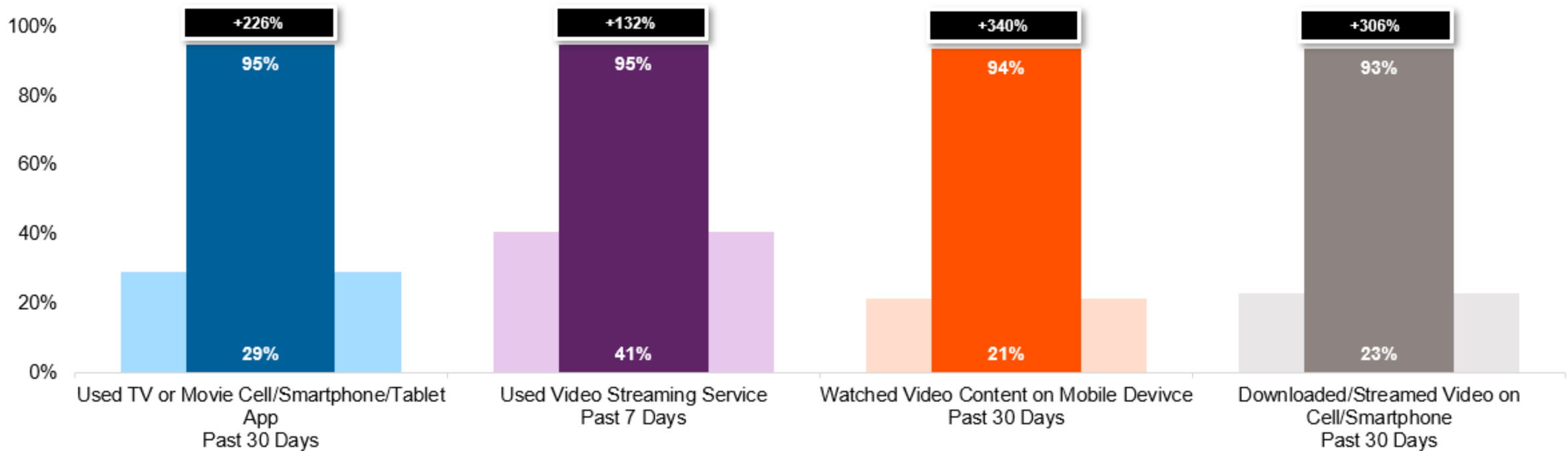
Heavy Other Media Consumers include adults 18-64 who fall into the top 2 volume groups for using that media type in the past 7 days. Any OOH includes adults 18-64 who traveled any miles in a car as a driver or passenger, in a city, town or suburb, in the past 7 days.

Source: MRI/Simmons

OOH Amplifies Video Media Investments

Adding OOH to plans for consumers who engage with digital video content doubles or triples reach

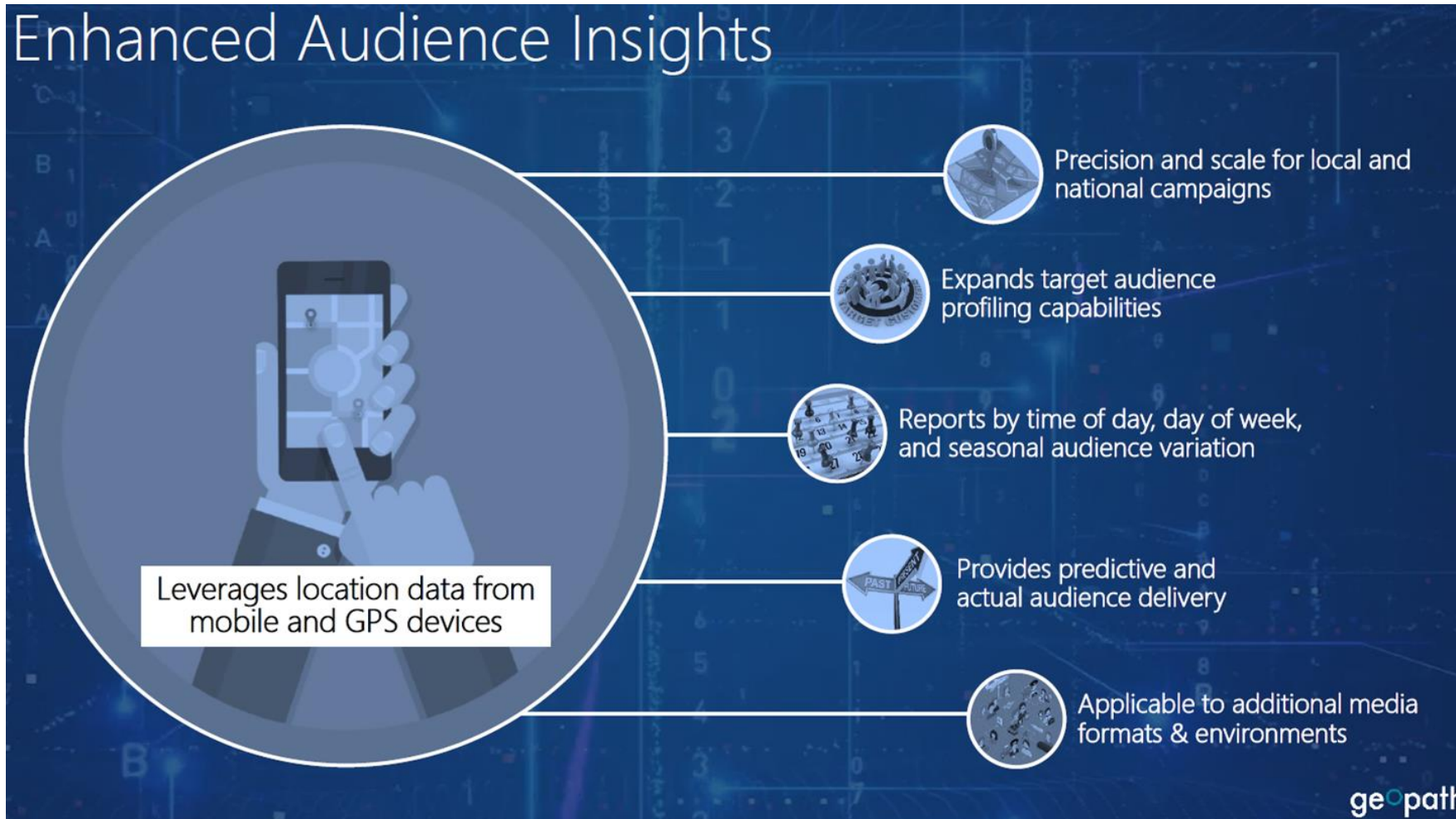
Users of Digital/Video Media Activities + Any OOH
Sorted by Volume



Any OOH includes adults 18-64 who traveled any miles in a car as a driver or passenger in a city, town, or suburb in the past 7 days OR noticed ads in movie theaters in the past 7 days.

Source: MRI/Simmons

Enhanced Audience Insights



OOH Breaks Through Clutter With 24/7 Exposure

OOH's Massive Reach Generates High Consumer Notice

88%

of adults have seen OOH ads in the past 30 days

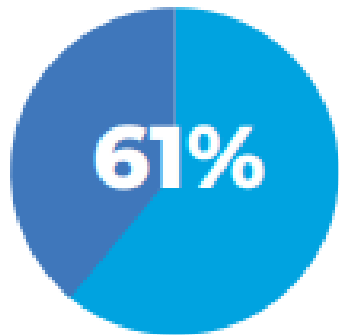
85%

of adults look at OOH ads all, most or some of the time

Source: Morning Consult

OOH - #1 In Consumer Ad Favorability

Most media produce voter tune-out because of their intrusive nature



of adults view billboard ads favorably, higher than any competitive media



Source: Morning Consult

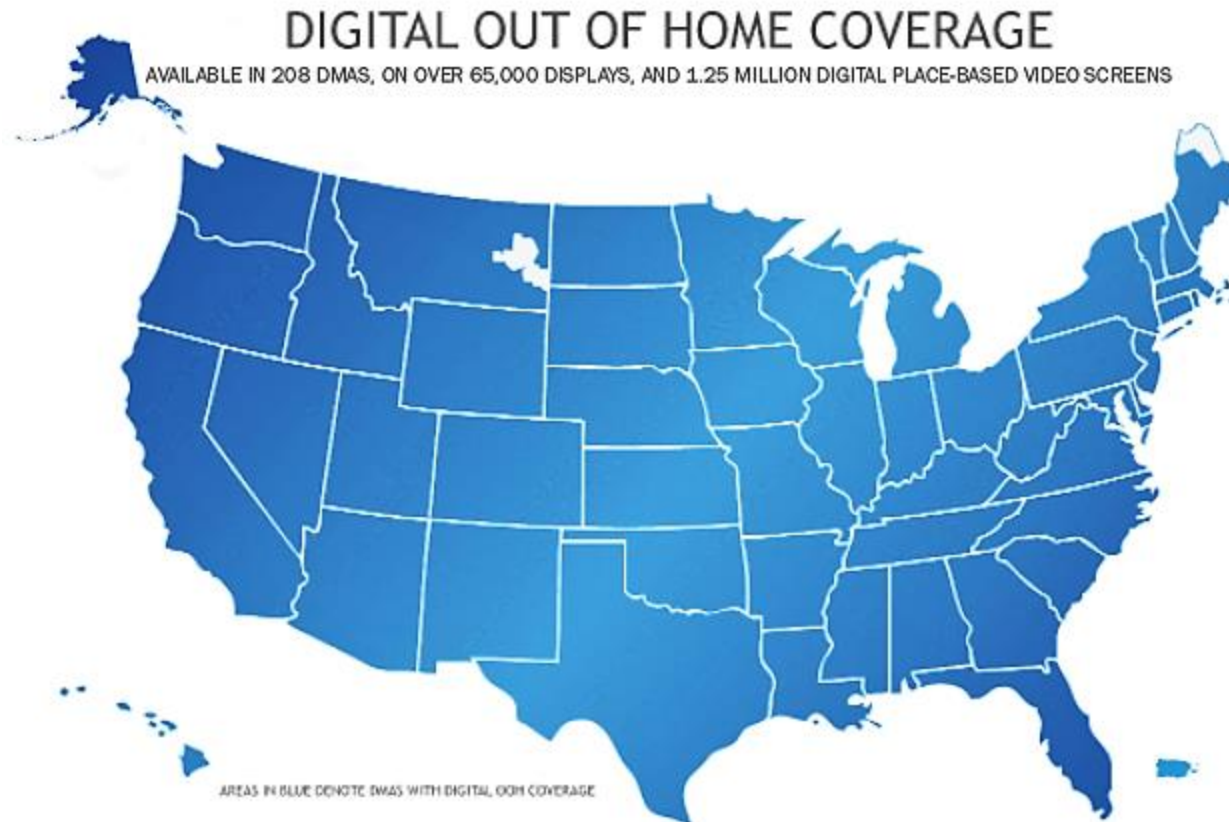
OOH Delivers Consumer Digital Activation - Boosts Search Investment by 40%



OOH boosts ROI of Search
+40%

Source: The Harris Poll, Nielsen

Digital OOH Offers Coverage Across the Entire US



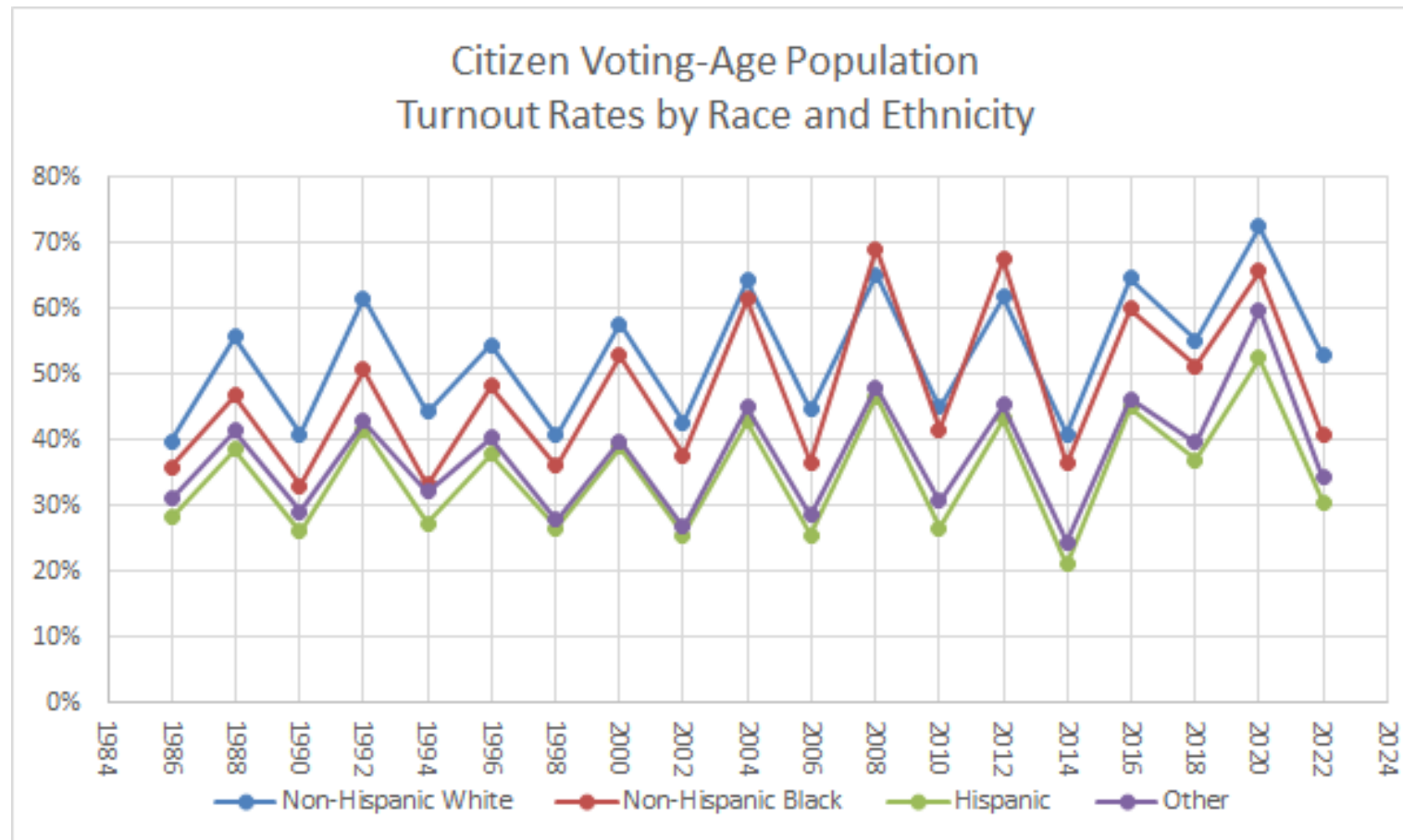
Bulletins, posters, mobile billboards, street furniture, transit, place-based, cinema

Digital OOH is more flexible than most types of advertising

- Instantaneous updating of message
- Ability to make changes as much as needed
- No production cost

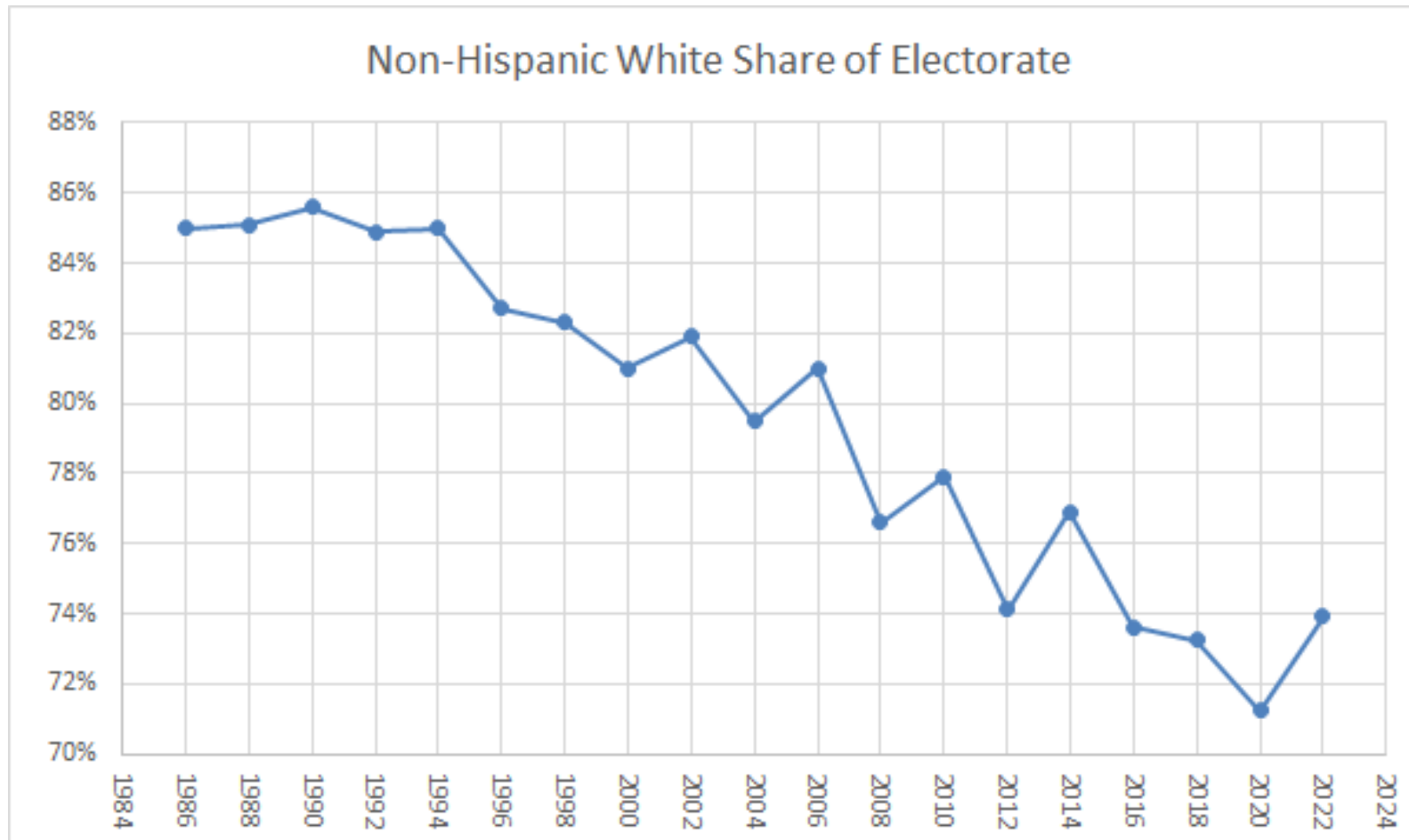


Voter Population Trends – Turnout by Race and Ethnicity



Source: ElectProject.org

Voter Population Trends – White Share of Electorate



Source: ElectProject.org

OOH Reaches Diverse Voters

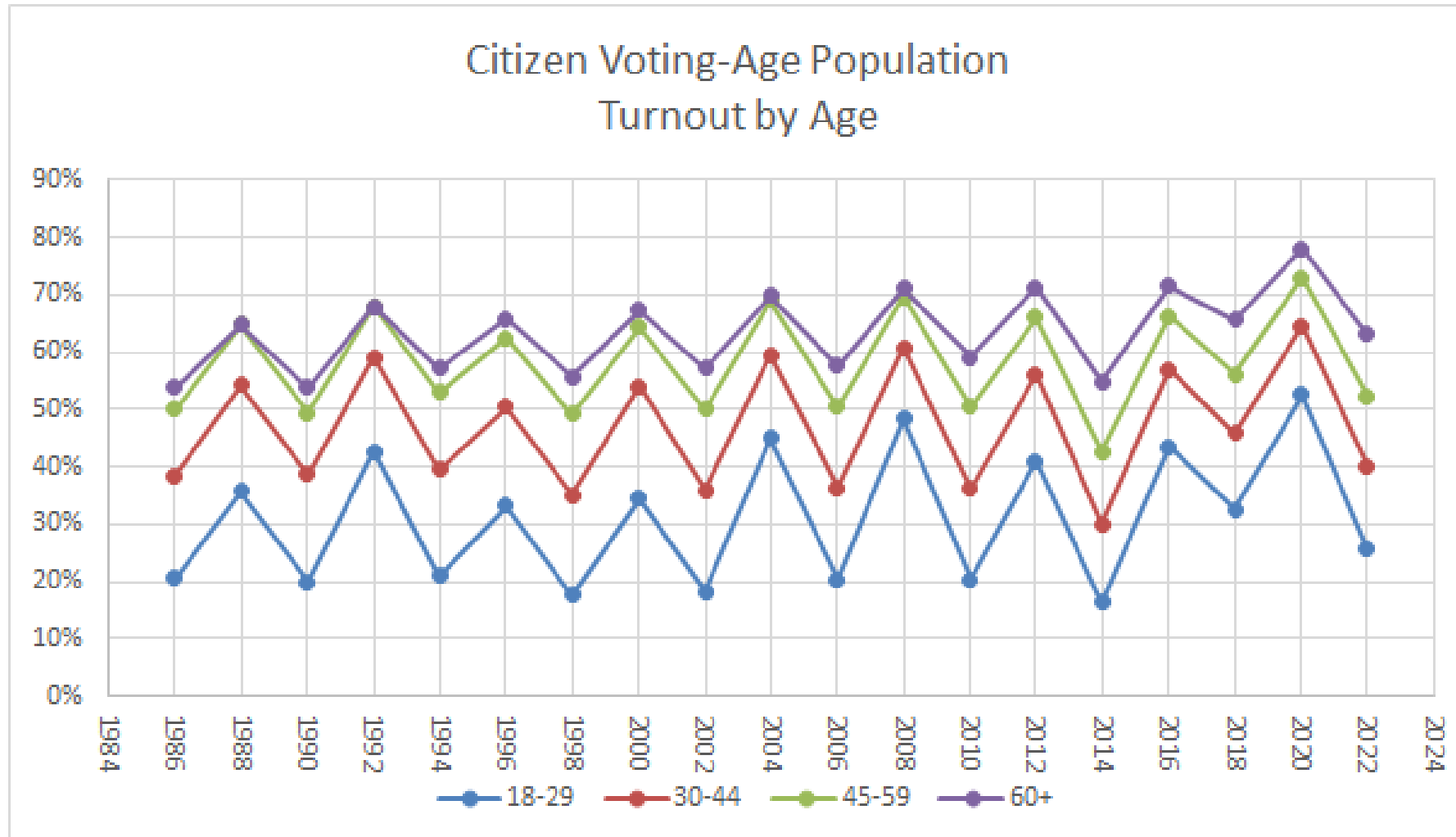
OOH over indexes in reaching key minority voting blocs:

- Hispanic Americans
- Asian Americans



Source: Morning Consult

Voter Population Trends – Turnout by Age



Source: ElectProject.org

OOH Reaches Young Voters

Adults **18 - 44** are the segment most heavily engaged with OOH media.
They over index with these OOH formats:

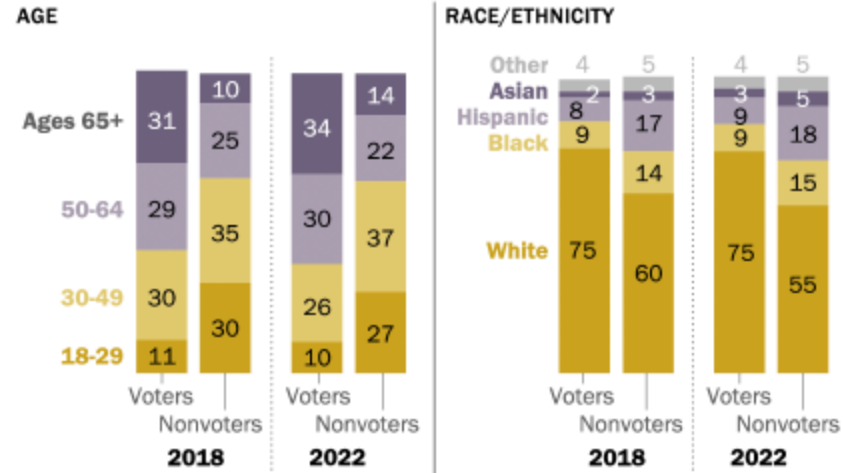
- Digital billboards
- Printed billboards
- Bus shelters and sidewalk kiosks
- Place-based video screens and printed signs
- Posters (*small billboards*)
- Shopping mall
- Taxis and ride share vehicles
- Movie theaters
- Airports
- Mobile billboards
- Subways or commuter rail



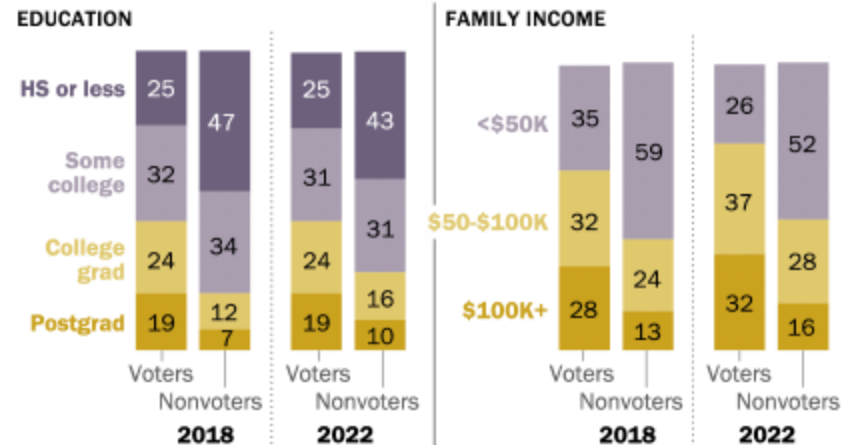
Source: Morning Consult

Unskippable OOH Can Reach Low Engagement Voters

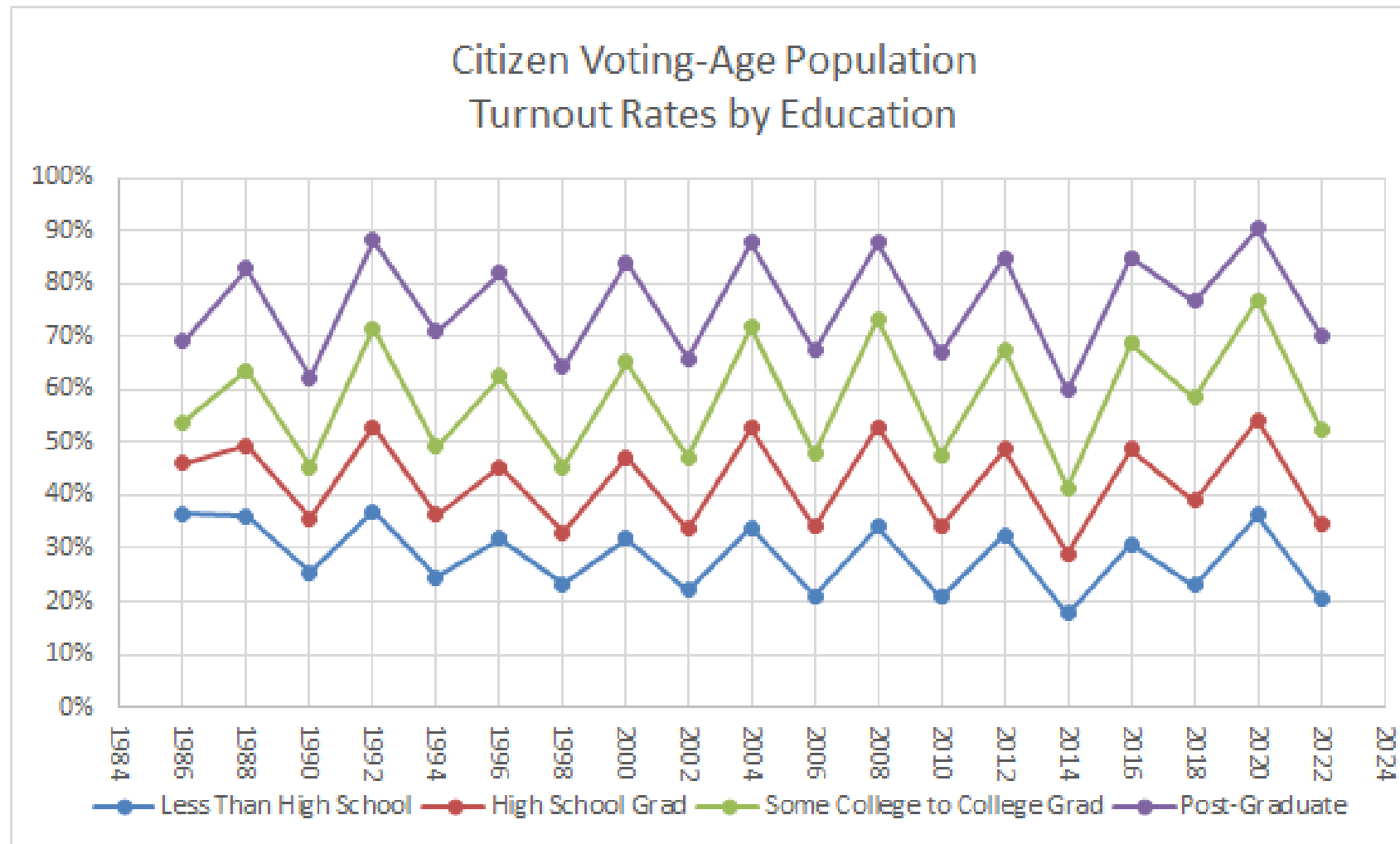
Composition of validated voters and nonvoters (%)



Wide disparities by age, race and education between voters and nonvoters



Voter Population Trends – Turnout by Education



Source: ElectProject.org

OOH Reaches High-Propensity Voters

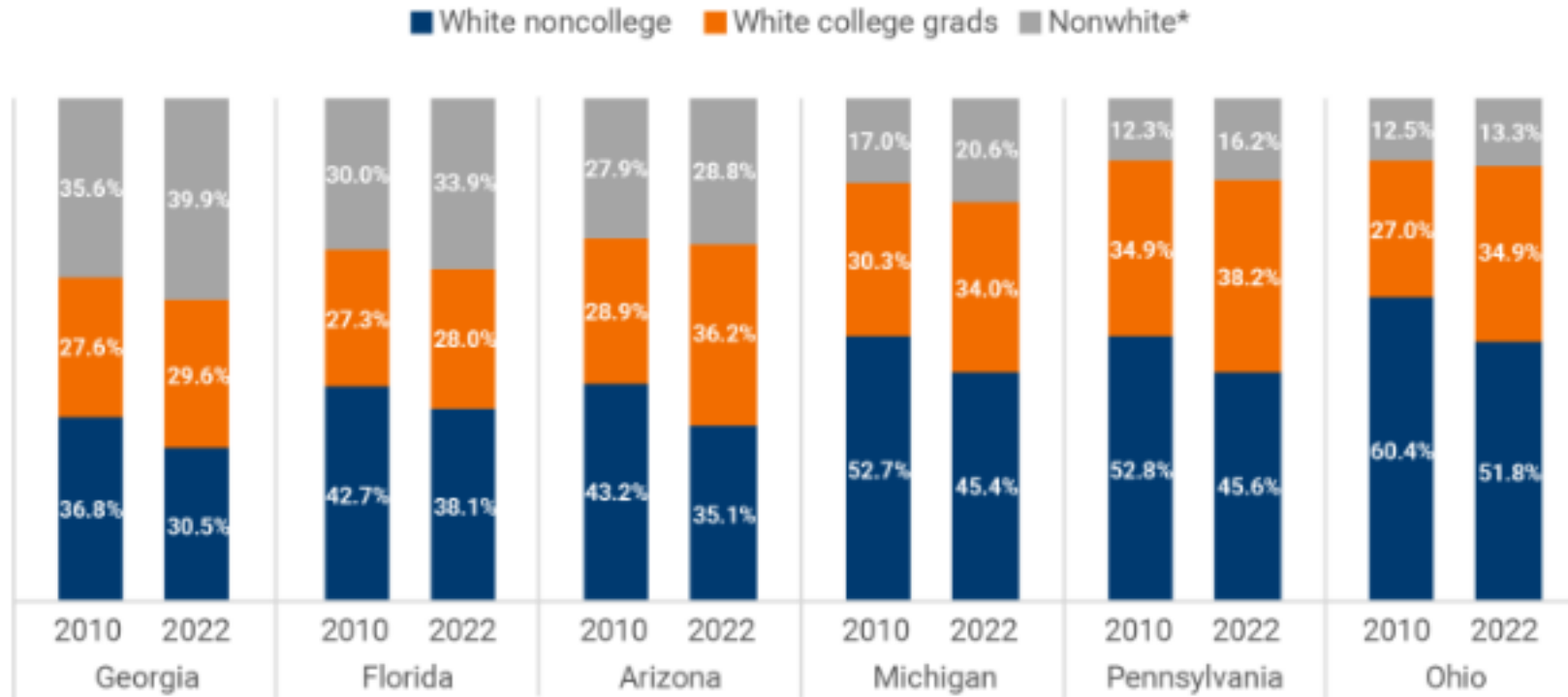
OOH over indexes in reaching likely voters:

- Adults 18-44
- Household Incomes of \$100K+



Source: Morning Consult

Voter Demographic Profiles in Key States



Source: William H. Frey, Brookings Institution



Political campaigns will run more digital ads this year than ever. Here's how they'll find you

- Brand safety
- Viewability
- Mistargeting



Among Adults 18+:

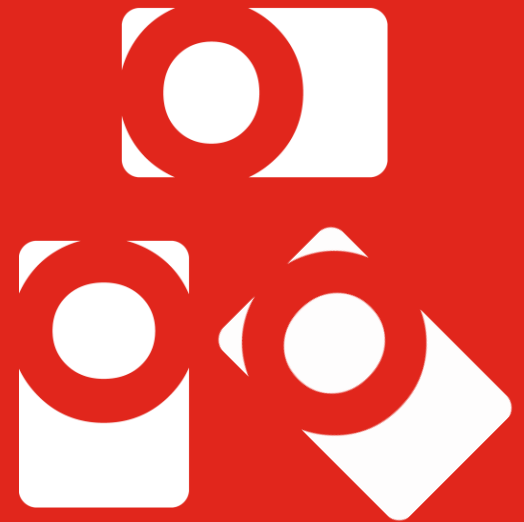
- **73%** are concerned with data privacy/use of personal information/behavior for online ad targeting
- **68%** frequently skip online ads due to digital device burnout
- **43%** are actively trying to spend less time on their phone, computer, or reduce TV viewing

Source: The Harris Poll

OOH Features and Benefits

Feature	Benefit
Lower CPMs and CPPs	More exposure for ad dollars spent
Feature	Benefit
Local demographic targets	Minimal wasted exposures
Feature	Benefit
Messages presented in an uncluttered environment	Messages are seen by the consumer and stand out from competitors
Feature	Benefit
A variety of media products, schedules, and weights	A customized media plan that fits budget objectives
Feature	Benefit
A compliment to any media mix	Media objectives are achieved effectively and efficiently
Feature	Benefit
A selling message delivered 24/7 to a mobile audience	A constant message between other media inserts

2023 Political Preview & Opportunities



2022 Political Ad Spend Set Midterm Record of \$10 Billion

Exceeded projections by \$1 Billion

- \$16.7 Billion Total Dollars Raised
- \$10 Billion Total Projected Ad Spend
(a midterm election record)
- Media Break Down:
 - \$4.3 Billion Broadcast TV
 - \$1.4 Billion Cable/Satellite
 - \$1.2 Billion Google/Facebook
 - \$1 Billion OTT/Streaming
 - \$300 Million Radio
 - \$28 Million OOH



Source: Vivvix, Mark Mellman

2023: Current Trends

\$50 million and counting

Presidential spending is off to a roaring start.

Republicans account for nearly \$45M led by Trump and DeSantis PACs.

Most ads are going to national cable outlets led by Fox News, CNN and MSNBC.

Ads spilling into early states: IA (\$12M) & NH (\$7.5M)

Typical Washington stuff

President Biden, Democratic PACs and the DNC to date.

Some spending surrounding the outcome of the debt ceiling deal between the President and Speaker McCarthy.

Both sides claiming victory.

A stunning amount

The Wisconsin Supreme Court race was expensive.

Wisconsin spending was led by Democrats and totaled around \$30M.

We believe this is an indicator of what to expect going forward especially where control of the court is involved. Watch Pennsylvania this fall. Remember LA last year?

Remember LA last year?

Mayor's Races are getting expensive.

Combined spending this year on Mayor's races in both Chicago and Philadelphia exceeded \$40M.

Source: Vivvix

Recap: Most Likely Areas of Ad Spend Focus

Presidential

- Republicans: Who's the candidate?

US Senate

- 51/49 current Democrat majority
- AZ, OH and MT are toss ups.
- WV a pickup for R's? Will there be close races in PA, NV, MI and WI?

US House

- Republicans +5 majority and 44 seats "in play"
- Recent Supreme Court decision on Alabama's redistricting could impact a number of states, including LA, NC, and NY, and play determining role of control.

Governors

- R's looking to pick up LA and KY this year.
- In NC, Gov. Cooper (D) term limited, so open seat and the only real toss up next year.

State Legislatures and Supreme Courts

- Expect a pitched battle as the impact from Dobbs continues
- Reproductive rights now up to each state (recent Wisconsin Supreme Court spend)

Source: Vivvix

2024: Even More Opportunity Ahead

Expected ad spend forecast of \$11.6 Billion

- \$19B in Projected Fundraising
- Media Break Down:
 - \$5B Broadcast TV
 - \$1.4B Cable/Satellite
 - \$1.2B Google/Facebook
 - \$1B OTT/Streaming
 - \$300M Radio
 - \$30M OOH



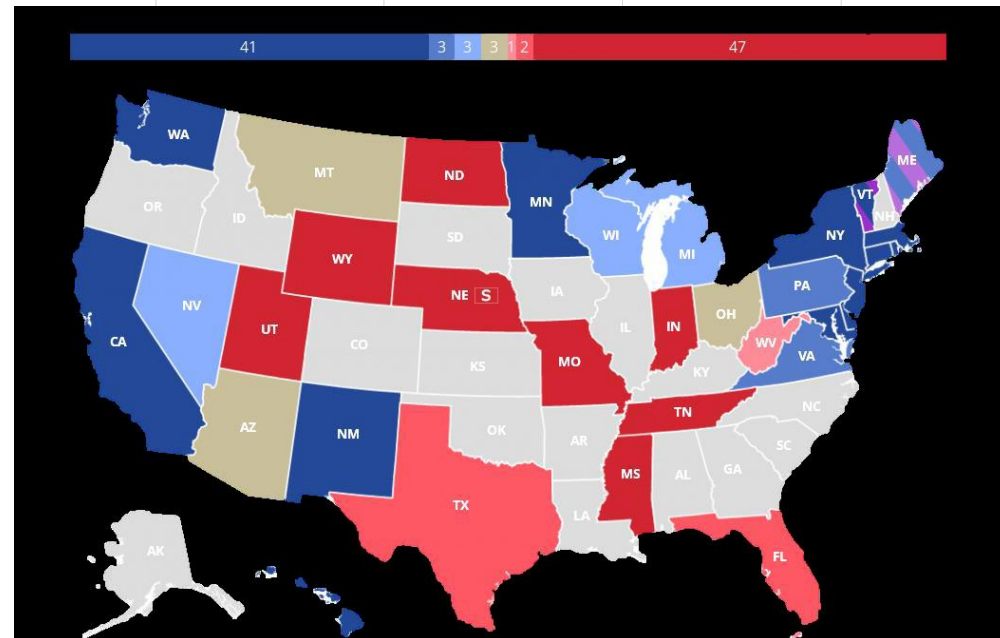
Source: Vivix

US Senate Outlook – Ten Competitive Races

DEMOCRATS | 23 HELD SEATS

REPUBLICANS | 11 HELD SEATS

SOLID D	LIKELY D	LEAN D	TOSS UP	LEAN R	LIKELY R	SOLID R
CA-Open CT-Murphy DE-Open HI-Hirono MA-Warren MD-Open ME-King (I) MN-Klobuchar NJ-Menendez NM-Heinrich NY-Gillibrand RI-Whitehouse VA-Kaine VT-Sanders (I) WA-Cantwell		MI-Open MT-Tester NV-Rosen PA-Casey Jr. WI-Baldwin	AZ-Sinema (I) OH-Brown WV-Manchin		FL-Scott TX-Cruz	IN-Open MO-Hawley MS-Wicker ND-Cramer NE-Fischer NE-Ricketts TN-Blackburn UT-Romney WY-Barrasso



- The Senate is not significantly more competitive this cycle compared to 2020 yet spend is still up 28x.
- 33 seats up, plus a special election in NE with Republicans defending 10 seats.
- Democrats defending 20, with three independents up as well.

Source: The Cook Political Report, Ballotpedia

Key States for US Senate Races

Arizona

- 2022 Senate race totaled \$206M. Now a three-way contest between Sen. Sinema, Rep. Gallego (D) and the eventual Republican nominee ... Kari Lake?

Michigan

- Senator Stabenow is retiring. Rep. Elissa Slotkin is the likely D candidate (MI7). She'll raise a fortune. Michigan R's need to coalesce to be competitive.

Montana

- 2020 Senate race totaled nearly \$150M. Senator Tester is a resilient candidate and won't be easy to beat - won by 18,000 votes in '18 with 50.3% of vote.

Nevada

- Could Las Vegas be an inventory nightmare again? Republicans still looking for a candidate to run vs. Senator Rosen. D's won by just 9,000 votes in 2022. The race between Sen. Cortez Masto & Adam Laxalt totaled \$146M.



Source: Vivvix

Key States for US Senate Races

Ohio

- 2022 Senate race was nearly \$150M. Sen. Brown is another resilient candidate. State Sen. Matt Dolan is likely opponent (lost Senate primary to Sen. Vance in '22)

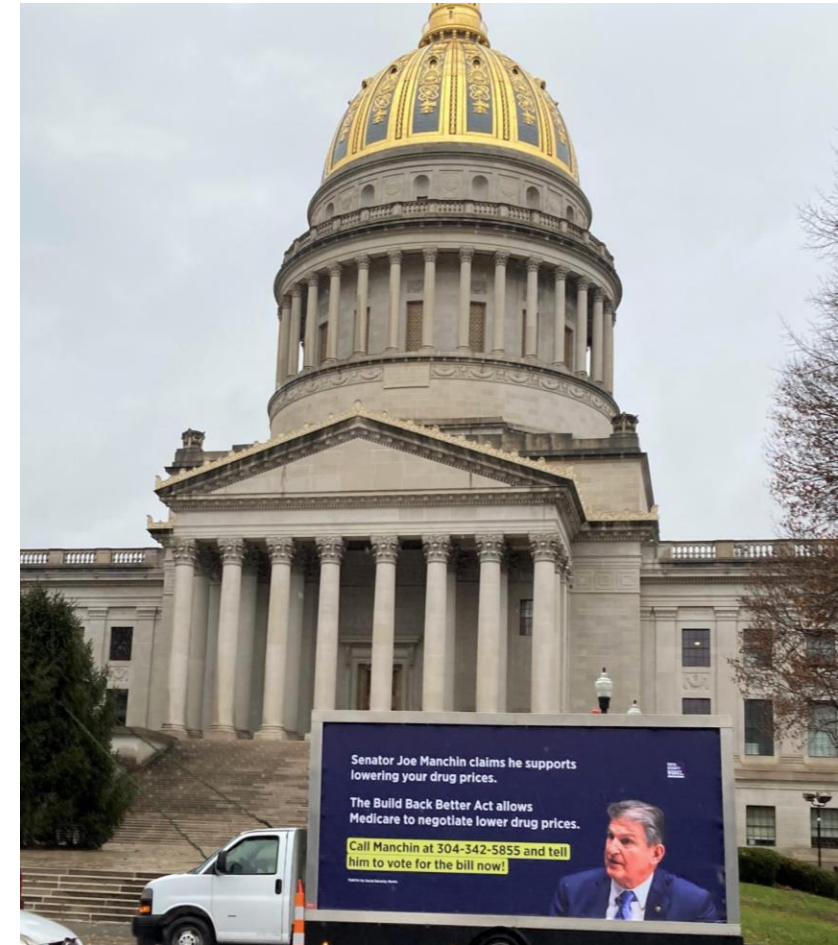
Pennsylvania

- Sen. Casey is a popular and likely up against David McCormick (lost R primary to Dr. Oz in '22). 2022 race totaled \$233M.

West Virginia

- A projected pickup for Republicans. Sen. Manchin is 22 points behind the likely R nominee. David Axelrod recently referred to Manchin as a “dead man walking.”

Source: Vivvix



US House Outlook – 75 Competitive Races

The US House outlook will change as states finalize redistricting changes

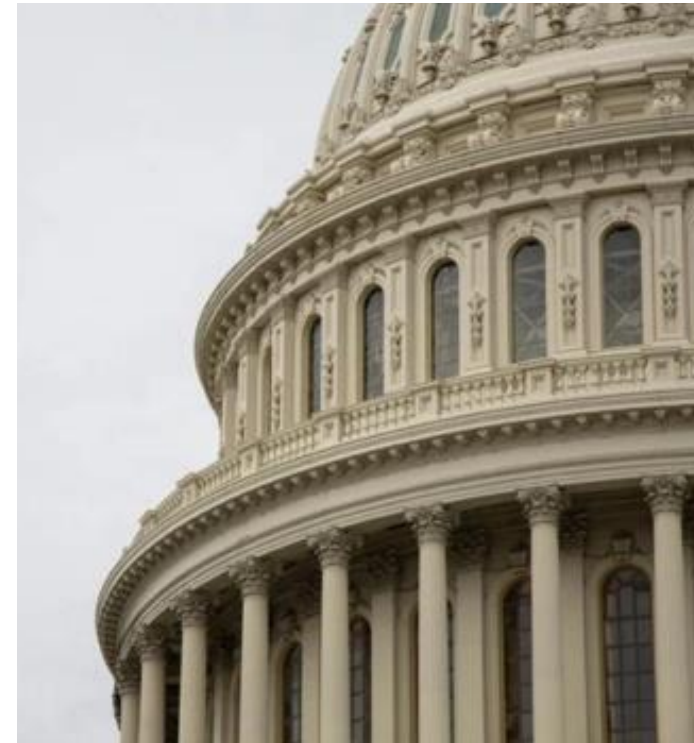
COMPETITIVE RACES

LIKELY DEMOCRAT 17 Dem • 0 Rep 0 Ind	LEAN DEMOCRAT 14 Dem • 1 Rep 0 Ind	DEMOCRAT TOSS UP 10 Dem • 0 Rep 0 Ind	REPUBLICAN TOSS UP 0 Dem • 16 Rep 0 Ind	LEAN REPUBLICAN 0 Dem • 6 Rep 0 Ind	LIKELY REPUBLICAN 0 Dem • 11 Rep 0 Ind
CA-09 Harder	<i>AK-AL Peltola</i>	<i>CO-08 Caraveo</i>	AL-01 Carl	CA-22 Valadao	<i>CA-03 Kiley</i>
CA-49 Levin	CA-47 Open (Porter)	MI-07 Open (Slotkin)	AL-02 Moore	CA-45 Steel	CA-40 Kim
FL-09 Soto	CT-05 Hayes	NC-06 Manning	AZ-01 Schweikert	<i>IA-03 Nunn</i>	<i>FL-13 Luna</i>
<i>FL-23 Moskowitz</i>	<i>IL-17 Sorensen</i>	<i>NC-13 Nickel</i>	<i>AZ-06 Ciscomani</i>	<i>MI-10 James</i>	IA-01 Miller-Meeks
KS-03 Davids	IN-01 Mrvan	<i>NC-14 Jackson</i>	<i>CA-13 Duarte</i>	NE-02 Bacon	<i>MT-01 Zinke</i>
MD-06 Open (Trone)	ME-02 Golden	<i>NM-02 Vasquez</i>	CA-27 Garcia	<i>VA-02 Kiggans</i>	<i>NY-01 LaLota</i>
<i>MI-03 Scholten</i>	<i>NC-01 Davis</i>	<i>OH-13 Sykes</i>	CA-41 Calvert		PA-01 Fitzpatrick
MI-08 Kildee	NV-03 Lee	PA-07 Wild	CO-03 Boebert		PA-10 Perry
MN-02 Craig	<i>NY-03 Santos</i>	PA-08 Cartwright	<i>LA-05 Letlow</i>		SC-01 Mace
NH-01 Pappas	<i>NY-18 Ryan</i>	<i>WA-03 Perez</i>	LA-06 Graves		<i>TX-15 De La Cruz</i>
NH-02 Kuster	<i>OH-01 Landsman</i>		<i>NJ-07 Kean Jr.</i>		<i>WI-03 Van Orden</i>
NV-01 Titus	OH-09 Kaptur		<i>NY-04 D'Esposito</i>		
NV-04 Horsford	<i>OR-06 Salinas</i>		<i>NY-17 Lawler</i>		
<i>OR-04 Hoyle</i>	<i>PA-17 Deluzio</i>		<i>NY-19 Molinaro</i>		
TX-28 Cuellar	TX-34 Gonzalez		<i>NY-22 Williams</i>		
VA-07 Spanberger			<i>OR-05 Chavez-DeRemer</i>		
WA-08 Schrier					

Source: The Cook Political Report

Control of the US House – On a Knife’s Edge

- After a disappointing ‘22 cycle, Republicans started ‘23 with a +5 margin in the US House. This is down to +4 following a resignation in a UT seat.
- There are 44 competitive seats according to Larry Sabato. That may change following the Supreme Court’s ruling on Alabama’s redistricting map, which could add as many as 4-6 D seats.
- Of the 44 seats, 24 are held by a freshman; California and New York each have six competitive House seats in the ‘24 election. North Carolina has four key races. Some of these 12 seats sit within the two largest DMAs in the country.
- In 2022, 3 House races totaled more than \$30m (MI-7, ME-2 and VA-7); 11 races were between \$20-30m. Total spend Vivvix/CMAG tracked exceeded \$1.3b led by House Leadership PAC but D’s outspent R’s by ~\$50m.



Source: Vivvix

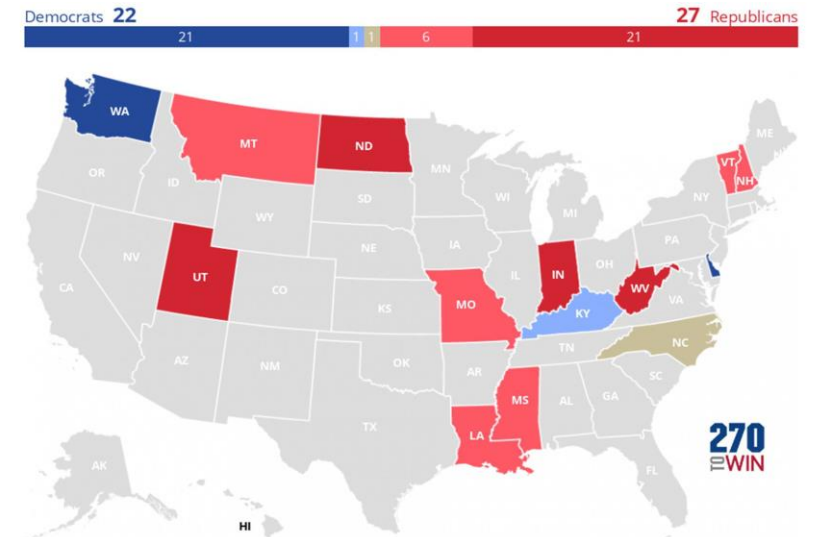
Gubernatorial Outlook – Five Competitive Races

DEMOCRATS | 5 HELD SEATS

SOLID D	LIKELY D	LEAN D	TOSS UP	LEAN R	LIKELY R	SOLID R
DE-Open WA-Open		KY-Beshear [2023] NC-Open		LA-Open [2023]		

REPUBLICANS | 9 HELD SEATS

SOLID D	LIKELY D	LEAN D	TOSS UP	LEAN R	LIKELY R	SOLID R
			NH-Open		MS-Reeves [2023]	IN-Open MO-Open MT-Gianforte ND-Open UT-Cox VT-Scott WV-Open






- The real action in '24 is in North Carolina where Gov. Cooper (D) is term limited. This is the only toss up on the map. Republicans hold veto proof majorities in the State Legislature and the majority in the State Supreme Court. The entire legislature is up for reelection in 2024.
- Republicans working to pick up the Governor’s mansions in both Louisiana and Kentucky in 2023.

Source: The Cook Political Report, Vivvix. 270toWin

Expect a more active ad cycle with both State Legislatures & State Supreme Court races.

- As of June 5, 2023, Republicans controlled 54.94% of all state legislative seats nationally, while Democrats held 44.33%. Republicans held a majority in 57 chambers, and Democrats held the majority in 40 chambers. Two chambers (Alaska House and Alaska Senate) were organized under multipartisan, power-sharing coalitions.
- The Dobbs decision by the US Supreme Court to overturn Roe v. Wade lets each state decide its own course on the issue of abortion. Therefore, the legislature of every state is now in charge of determining the laws overseeing that procedure drawing more attention and more money.
- It's not just drawing Congressional districts every ten years and serving as each party's bench for more up ballot contests. Same process for State Supreme Court races. A \$30M price tag in Wisconsin is a great example of this new reality. While control is not an issue, the Supreme Court race in Pennsylvania this fall is worth watching as a sign of how active it becomes.

Partisan balance of all 7,386 state legislative seats				
Legislative chamber			 Other	Vacant
State senates	853	1,111	5	4
State houses	2,425	2,948	21	19
Total:	3,278	4,059	26	23

Source: Vivvix, Ballotpedia

Ballot Measures – One of OOH's Biggest Opportunities

- [Ballotpedia](#) – free website with compilation of potential ballot measures listed by state
- Listing of upcoming 2023 and 2024 ballot measures by state on their website

October 14

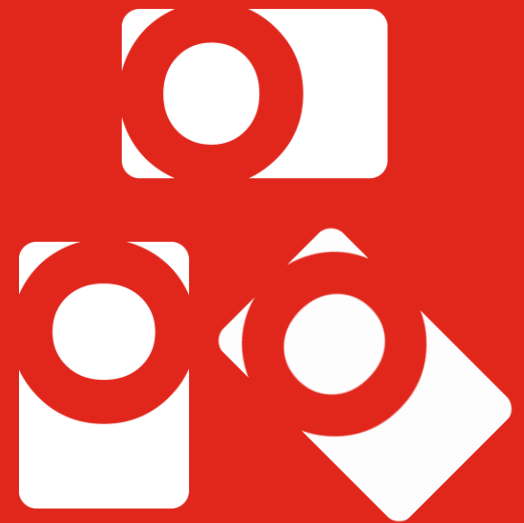
1. Louisiana Constitutional Right to Worship in a Church or Place of Worship Amendment (October 2023)
2. Louisiana Ban on Private or Foreign Funding of Election Costs Amendment (October 2023)
3. Louisiana Prohibit Property Tax Exemptions for Nonprofits Owning Damaged Residential Property Amendment (October 2023)
4. Louisiana State Retirement System Funding Amendment (October 2023)

November 7

1. New York Exclude Indebtedness for Sewage Facilities Amendment (2023)
2. Texas Abolish Galveston County Treasurer Amendment (2023)
3. Texas Right to Farming, Ranching, Timber Production, Horticulture, and Wildlife Management Amendment (2023)
4. Texas Tax Exemption on Medical Equipment and Inventory Amendment (2023)
5. Texas Rename State University Research Fund and Establish Ongoing Revenue Source Amendment (2023)
6. Texas Increase Mandatory Retirement Age for State Judges Amendment (2023)
7. Texas Creation of the Broadband Infrastructure Fund Amendment (2023)
8. Texas Cost-of-Living Adjustments for Teacher Retirement System Amendment (2023)
9. Texas Prohibit Taxes on Wealth or Net Worth Amendment (2023)
10. New York Remove Debt Limit on Small City School Districts Amendment (2023)
11. Texas Property Tax Exemption for Childcare Facilities Amendment (2023)
12. Texas Authorize Bond Issues in Conservation and Reclamation Districts in El Paso County Amendment (2023)
13. Maine Pine Tree Power Company Initiative (2023)
14. Texas Creation of State Energy Fund Amendment (2023)
15. Colorado Proposition II, Tobacco and Nicotine Product Tax Revenue Measure (2023)
16. Maine Voter Approval of Borrowing Above \$1 Billion by State Entities and Electric Cooperatives Initiative (2023)
17. Maine "Right to Repair Law" Vehicle Data Access Requirement Initiative (2023)
18. Texas Creation of the Centennial Parks Conservation Fund Amendment (2023)
19. Texas Creation of the Water Fund Amendment (2023)
20. Texas Property Tax Changes and State Education Funding Amendment (2023)
21. Colorado Proposition HH, Property Tax Changes and Revenue Change Measure (2023)

Source: Ballotpedia

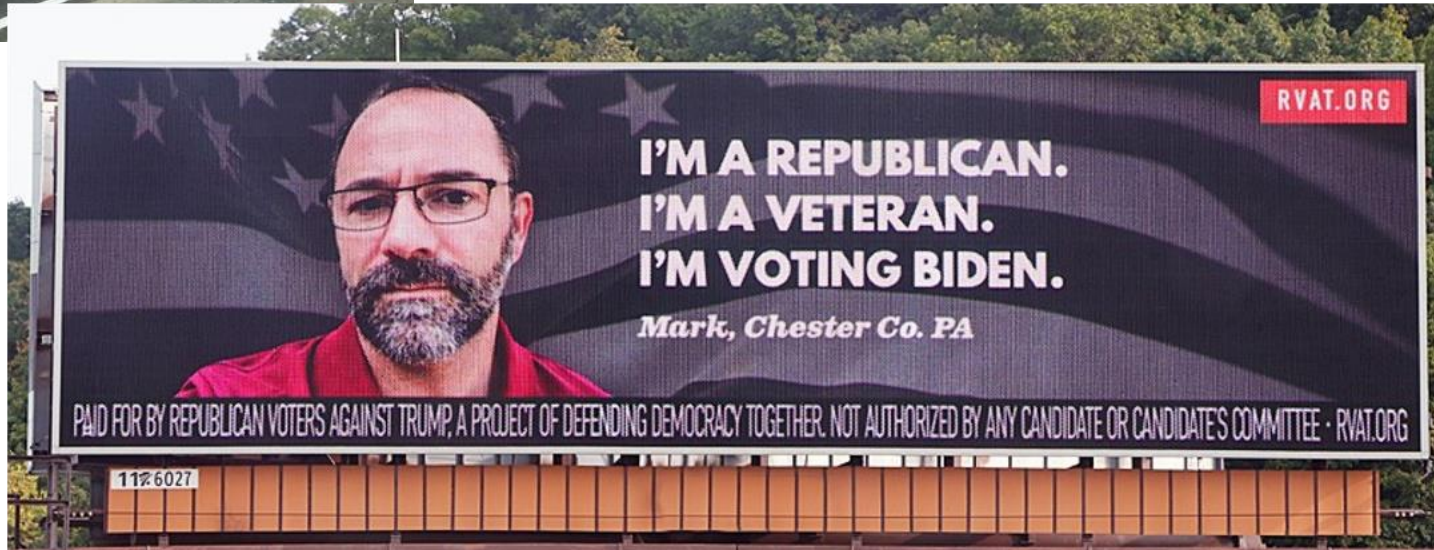
OOH Political Case Studies



Elections – Get Out The Vote (GOTV)

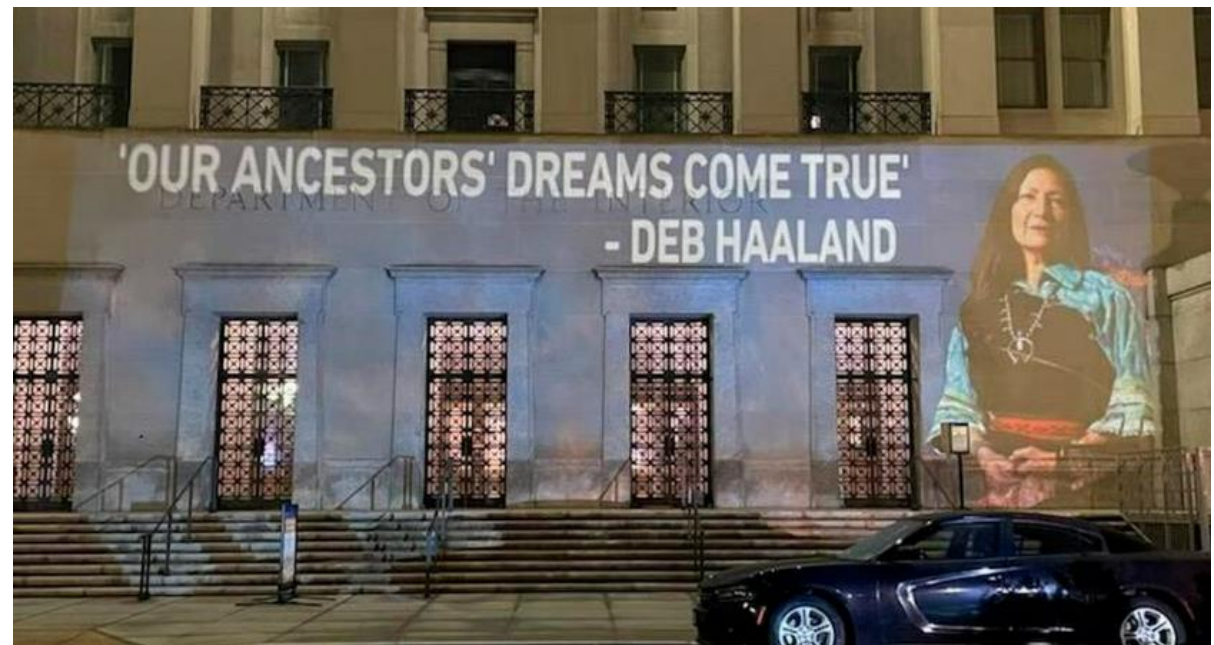


- In the crucial state of Pennsylvania, the 2020 general election turnout exceeded every presidential election since at least 1960, with **more than 6.9 million voters**
- The election also produced the highest percentage of participation by the voting-age population – **70.93%**



Presidential Cabinet Appointments

Indigenous American groups used billboard to put pressure on senators in WV, WY, MT and SD to support Rep. Deb Haaland (D-N.M.) to lead the Interior Department. **Secretary Haaland was confirmed** and became the first Indigenous American to lead the Department.



Billboards helped Sacramento City Council Member Angelique Ashby defeat the former California Insurance Commissioner Dave Jones for the California State Senate seat with **51.5% of the vote.**



Elections – City Controller

Billboards helped political newcomer Kenneth Mejia to **an upset win over a veteran city councilmember**, and he became the first Asian American to win citywide office in Los Angeles.



Elections – County District Attorney

Billboards are part of a local citizen's PAC to **derail the upcoming re-election** of District Attorney Mike Schmidt.



The Economic Justice Alliance of Michigan (EJAM) used billboards and interior bus cards to drive voter participation in communities with historically low voter turnout. EJAM targeted multicultural consumers, mothers and young adults. In 2022, Michigan voters ages 18-29 turned out at a rate of 37%, **higher than any other state, and far higher than the national average** youth rate of 23%. Michigan was one of only four states where youth turnout was higher in 2022 than in 2018.



Ballot Referendum

In Maryland, sports betting proponents used billboards to urge voters to approve ballot initiative 2, which passed with **67% of the YES vote.**



Ballot Referendum

In South Dakota cannabis proponents used billboards to urge voters to approve Amendment 26, which passed with **70% of the YES vote.**





The campaign of Mark Amodei, R-NV, buys digital billboards:

- Don't use TV because of fragmentation
- Competitive US Senate and presidential races in Nevada typically make TV inventory scarce and expensive
- Don't use direct mail because believe it's an expensive throwaway
- Online ads are typically No. 1 expenditure
- Digital billboards are a close No. 2

“What sold me on digital billboards was the feedback,” says Amodei. “I got nothing but good feedback.”

Two other attributes he noted about digital billboards:

- Easy with no production
- Projected a clean, sharp, modern image for his campaign

Running in a newly-drawn district in metro Atlanta, David Scott relied on billboards to reach commuters to **win election** to Congress, **and then re-election.**



The two Democrats in Georgia both defeated incumbent Republicans in close runoff elections that gave the Democrats the majority in the US Senate.



President Trump was supported by a local Union County, Oregon PAC and he won the county with 68% of the vote.



President Biden's campaign was helped by citizen activists in the critical swing state of Michigan, where **he won the state with 50.6% of the vote.**



Pennsylvania State Senator Dan Laughlin (R) wanted to increase his name recognition in advance of the general election to solidify his re-election campaign, and dissuade serious Democratic party challengers.

- The billboard campaign of digital bulletins and posters took his name recognition **from 40% to 65%**.
- He improved on his 2016 performance of **55% and increased it to 60%**.



Billboards were part of Barry Glassman's media strategy **propelling him to a second term** as Harford County Executive in Maryland.



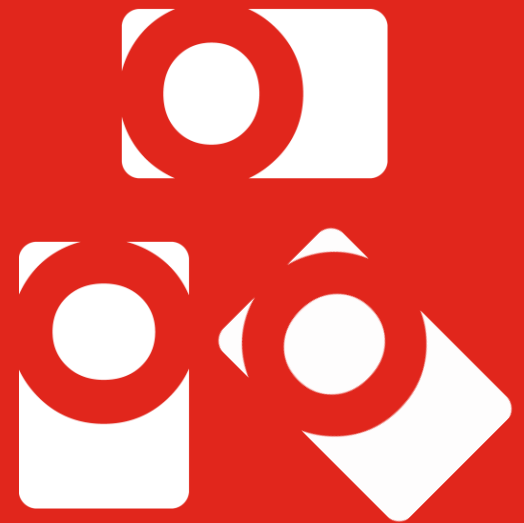
Advocacy – Voter Registration

Harris County officials ramped up the county’s voter awareness campaign to remind voters to bring photo IDs to the polls, and were billboards were printed in multiple languages.

Harris County Clerk Stan Stanart said, “**Billboards are a fantastic way to communicate** to the citizens of Harris County. We want to make sure that every person in Harris County gets the right to vote.”



Political Agencies and Organizations



Political Agencies and Organizations – Contact List



Political Media Agencies and Organizations

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DEMOCRATIC MEDIA BUYERS

Tier 1

Buying Time
Catherine Herrick
(202) 965-5060
cathie@buying-time.com
www.buying-time.com
Washington, DC
Media Buying/Placement

Washington-based media buying firm that works with many Democratic candidates and consultants. SKDK works with Buying Time extensively.

REPUBLICAN MEDIA BUYERS

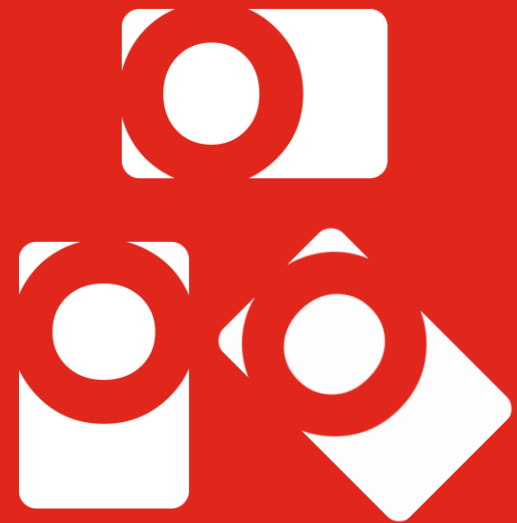
Tier 1

National Media
(703) 683-4877
info@natmedia.com
www.natmedia.com
Alexandria, VA
Media Buying/Placement

Top GOP media firm that specializes in placement of political advertising and original research. Majority of NRCC placement, plus multiple other groups/campaigns.

- Detailed list of major political agencies and organizations
- Contact information for each entry
- [Download the contact list here](#)

APPENDIX: More OOH Political/Advocacy Ads



OOH Get Out The Vote (GOTV) Campaigns



OOH Get Out The Vote (GOTV) Campaigns



OOH Political/Advocacy Campaigns



OOH Political/Advocacy Campaigns



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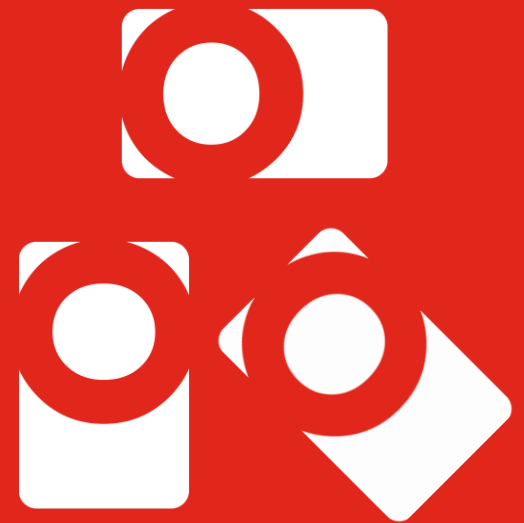
OOH Political/Advocacy Campaigns



OOH Political/Advocacy Campaigns



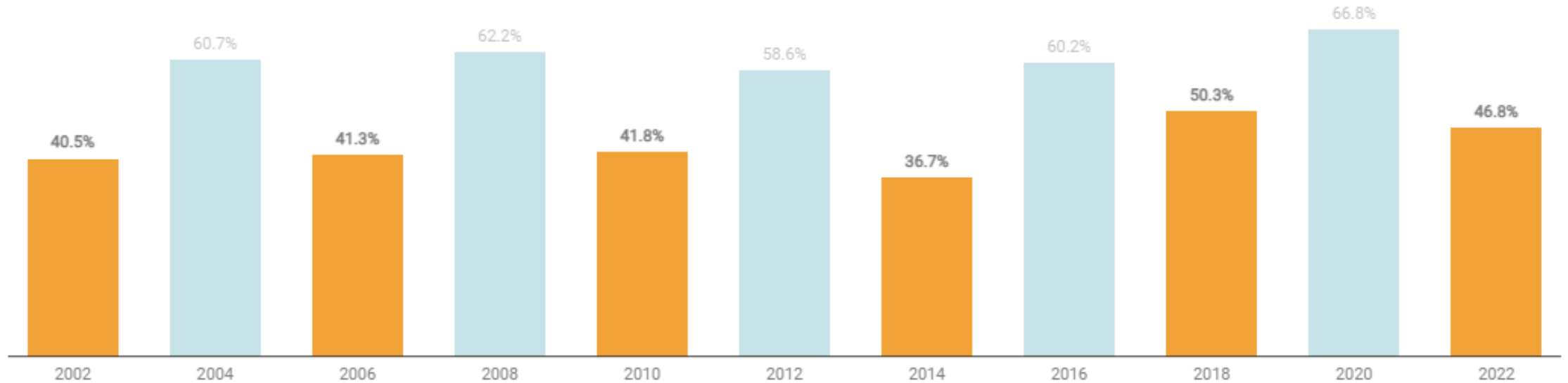
APPENDIX: Additional Voter Trend Statistics



Historical Rates of Voter Turnout

Voter turnout rates, 2002-2022

Showing nationwide voter turnout rates in **midterm** and **presidential** elections since 2002. The rate used here is an expression of total ballots cast divided by the total number of eligible voters.



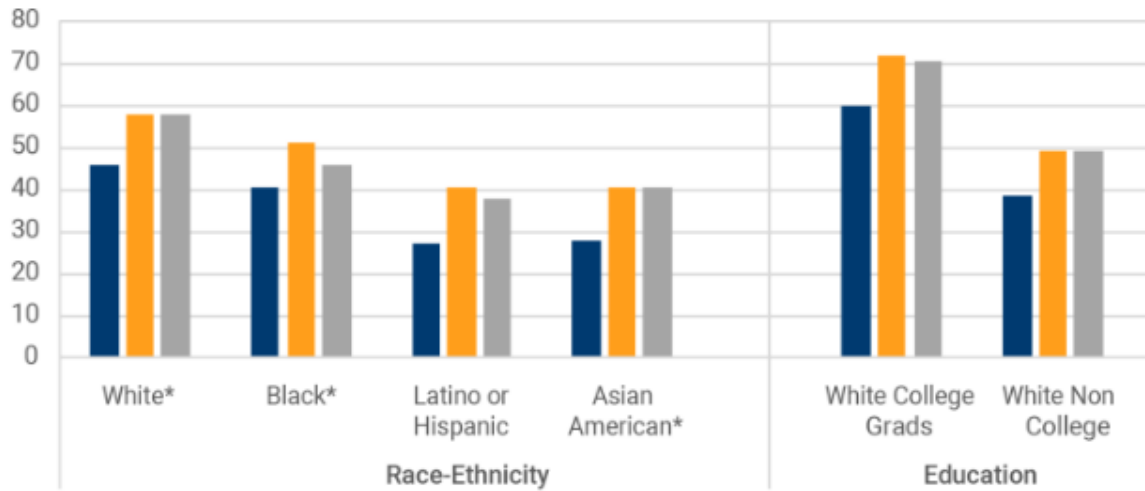
Turnout rates by state are available [here](#).

Source: Ballotpedia

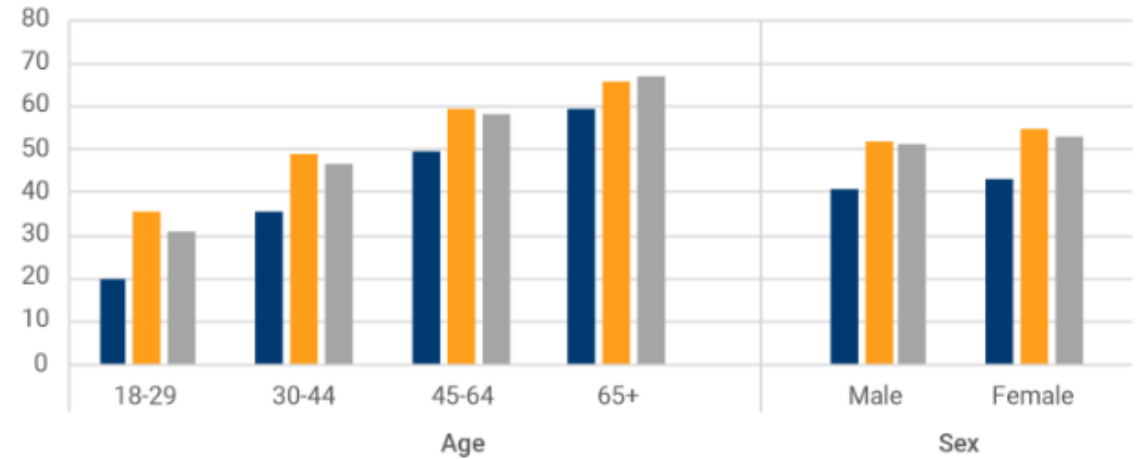
Multicultural Voter Growth Leapt in 2018 + 2022

■ 2014 ■ 2018 ■ 2022

Race and Education



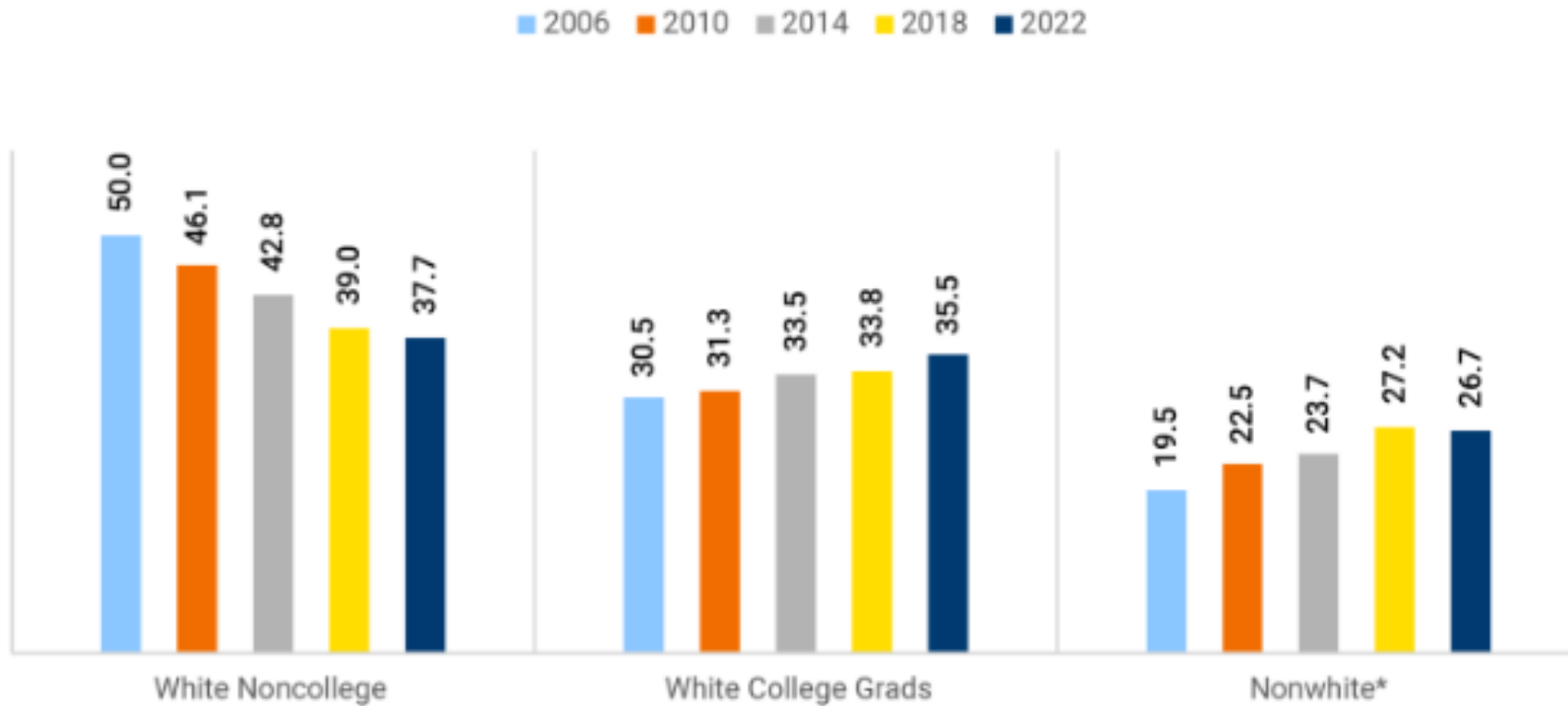
Age and Sex



Source: William H. Frey, Brookings Institution

Long-term Demographic Trends Shift Voter Influence

Downward trend among white noncollege-educated voters versus upward trend of college-educated whites and multicultural voters



Source: William H. Frey, Brookings Institution

APPENDIX: Creative & Media Planning Resources

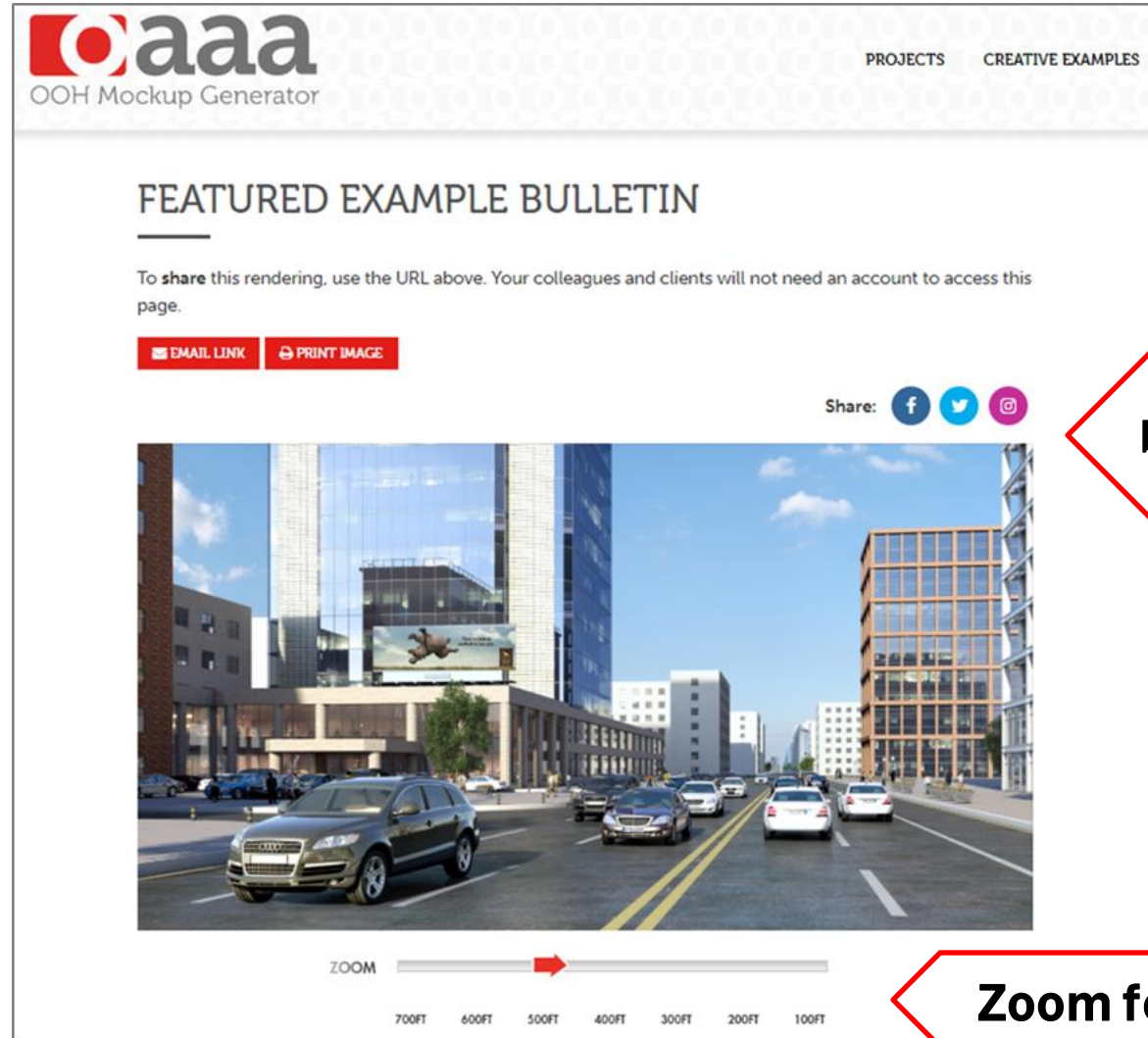


OOH Formats:

- Bulletin
- Poster
- Custom Extension
- Wall
- Bus
- Bus Shelter
- Bus Bench
- Newsstand
- Taxi
- Mobile Billboard
- Transit Station
- Shopping Mall
- Street Banner
- Airport

OOH Environment Views:

- Highway
- Urban
- Suburban
- Rural



Renderings can be emailed directly to clients

Zoom feature

Creative Mockup Generator – <https://oohmockupgenerator.oaaa.org/>

Welcome

The OOH Mockup Generator allows you to view billboard, street furniture and transit creative in the environment. Once you have uploaded your creative, you will be able to zoom in and out to see the work at a range of distances, share the rendering with colleagues and clients, and print out a copy for your records.

This tool requires an active OAAA account. Members should contact OAAA at (202) 833-5566 for assistance in retrieving their log-in information.

Log in to Your Account

Username*

Password*

LOGIN

Register for Access

- Free to use
- One time registration

View Creative Examples



Airport LG



Airport XL



Building



Bulletins



Bulletins with Extensions



Digital Bulletins

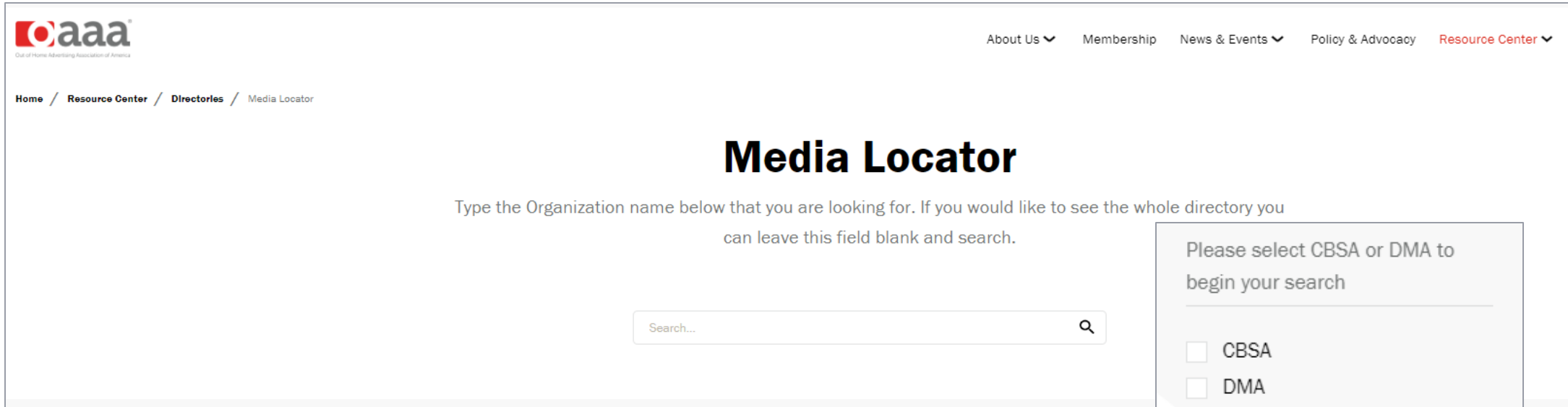


Bench



Bus Front

Planning Resources: OOH Media Locator



The screenshot shows the OAAA OOH Media Locator website. At the top left is the OAAA logo. The top right navigation menu includes: About Us, Membership, News & Events, Policy & Advocacy, and Resource Center. Below the navigation is a breadcrumb trail: Home / Resource Center / Directories / Media Locator. The main heading is "Media Locator". Below the heading is a text prompt: "Type the Organization name below that you are looking for. If you would like to see the whole directory you can leave this field blank and search." Below this is a search input field with a magnifying glass icon. On the right side, a filter panel is open, showing a title "Please select CBSA or DMA to begin your search" and two checkboxes: "CBSA" and "DMA". Below the checkboxes are four filter categories with dropdown arrows: "Billboards", "Street Furniture", "Transit", and "Place-Based". At the bottom of the filter panel is a red "Apply Filters" button.

OAAA OOH Media Locator by:

- CBSA
- DMA
- Format
- Media Company (with direct link)
- Export search results in Excel