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Influence of Out of Home Political Ads

— MARCH 2024



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Key Takeaways

Likely voters are engaging with OOH ads, and more than they were a year ago.

A majority of likely voters describe OOH ads as informative (53%), followed by entertaining (34%), influential (30%), and authentic (23%).

2 When it comes to the current political climate, likely voters are most likely to feel frustrated (42%), disappointed (36%), and anxious (34%).

Republicans (49%) are more likely than Democrats (42%) and independents (30%) to be optimistic about the elections coming up in November.

OOH political ads are influential and trusted.

49% of likely voters who have been exposed to an OOH political ad in the past year say OOH political ads are personally influential, and 56% say they trust political information in an OOH ad to be truthful and accurate.

OOH political ads are valued for information on candidates + issues.

Nearly half of likely voters agree OOH political ads help inform them about political candidates (45%) and policy issues (44%). Plus, a quarter of likely voters say OOH political ads remind them of the need and value of voting (26%) and increase their awareness on issues (25%).

5 Likely voters like OOH political ads for a variety of reasons.

Likely voters find OOH political ads appealing because the ads: don't interrupt their listening, reading or viewing experience like most other political ads (34%); are readily visible (28%); are easily shared on social media (25%); and are short form (24%).

6 GOTV campaigns influence voting behavior.

A majority (58%) of those exposed to GOTV campaigns say they made them *more likely* to vote. Additionally, nearly a third (29%) of those who have recently seen GOTV campaigns saw it in an OOH ad form.

Methodology

This poll was conducted between February 23-25, 2024 among a sample of 1,616 likely 2024 voters age 18-64. The interviews were conducted online and the data were weighted to approximate a target sample of likely voters age 18-64 based on age, gender, race, Hispanic/non-Hispanic, education, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.



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Likely voters are engaging with out of home ads, and more than they were a year ago.

How often do you consume information through each of the following?



Of likely voters consume information through an OOH ad at least weekly

Younger likely voters (GenZers 57%, Millennials 60%) and those with a post-graduate degree (64%) are especially likely to consume information through an OOH ad at least weekly.

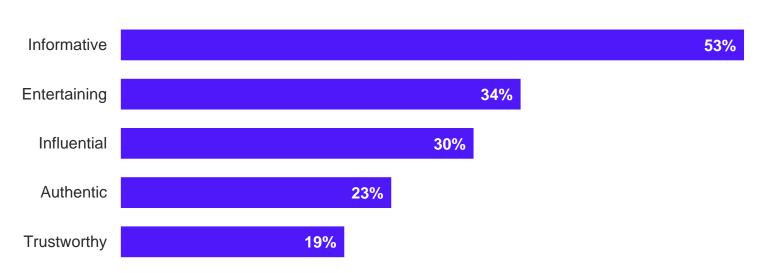
In comparison to a year ago, are you consuming more or less information through each of the following?



Of likely voters report they are consuming *more information* through OOH ads compared to a year ago

A majority of likely voters describe OOH ads as informative (53%), followed by entertaining (34%), influential (30%), and authentic (23%).

Which word(s) best describes each of the following media sources? Please select UP TO THREE for each platform. *Ads in outdoor and public places* (billboards, bus, subway and other transit ads, posters, outdoor video screens, cinemas, stadiums, airports, gas stations, etc.)



Selected

OOH ads are more likely to be seen as *informative* in comparison to most other media sources, especially subscription streaming video + audio, social media, and Cable TV.

Which word(s) best describes each of the following media sources? Please select UP TO THREE for each platform.

% Selected	Ads in outdoor and public places	AM/FM Radio	Broadcast Television	Cable TV	Subscription streaming video	Social media	Online websites	Other streaming audio	Newspaper online or print
Informative	53%	50%	54%	49%	35%	38%	53%	49%	60%
Influential	30%	23%	30%	29%	29%	35%	34%	33%	27%

Likely voters are very engaged in the news, with a majority saying they actively watch, read, or listen to the news at least most days in a week (58%). Baby Boomers are the age group most likely to be consuming news several times a day (30%).

Which of the following, if any, best applies to you? 'In a typical week, I actively watch, read, or listen to the news'

	Seve	ral times a day	Most days	s in a week	• 0	nce per week		l do	n't know	
	At lea	ast once a day	A few tim	es per week	L	ess than once p	oer week			
18-64 Likely Voters	21%		26%		1%	20%	, D	8%	11%	
GenZers: 1997-2012	12%	19%	12%		24%		11%		19%	
Millennials: 1981-1996	20%	2	1%	12%		23%		11%	10%	
GenXers: 1965-1980	23%		31%		1	1%	17%	6%	6 11%	6
Baby Boomers: 1946-1964	30%			33%		9%		16%	7%	0
PID: Dem	24%		25%		11%	199	0	9%	10%	D
PID: Ind	21%		24%	13	8%	19%		7%	12%	4%
PID: Rep	18%		29%	1′	1%	22%)	8%	12%)
Educ: < College	19%		26%	12	%	19%		8%	13%	
Educ: Bachelors degree	22%		26%		11%	21	%	8%	10%	6
Educ: Post-grad	27%		26%)	8%		20%	g	% 9	%
Income: Under 50k	20%		26%	11	%	18%		9%	12%	4%
Income: 50k-100k	19%		27%	1	3%	22	%	7%	11%	0
Income: 100k+	27%		25%		9%	2)%	10	% 10)%
Ethnicity: White	22%		26%		11%	200	6	8%	12%	
Ethnicity: Hispanic	13%	28%		10%		23%		10%	10%	6%
Ethnicity: Black	25%		21%		14%	17%	0	9%	10%	4%
Ethnicity: Asian + Other	18%		30%		10%	21%	0	10%		%



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POLITICAL SENTIMENT

When it comes to the current political climate, likely voters are most likely to feel frustrated (42%), disappointed (36%), and anxious (34%). Baby boomers and independents are especially likely to feel frustrated and disappointed.

% Selected	Likely Voters	GenZers: 1997-2012	Millennials: 1981-1996	GenXers: 1965-1980	Baby Boomers: 1946-1964	PID: Dem	PID: Ind	PID: Rep
Frustrated	42%	37%	35%	45%	54%	37%	55%	38%
Disappointed	36%	34%	32%	36%	44%	29%	48%	35%
Anxious	34%	37%	34%	32%	39%	39%	34%	29%
Hopeful	29%	25%	35%	27%	25%	35%	20%	28%
Overwhelmed	24%	34%	23%	22%	20%	27%	23%	21%
Angry	23%	20%	18%	25%	35%	20%	29%	23%
Scared	22%	23%	19%	22%	31%	23%	24%	20%
Excited	16%	12%	24%	12%	10%	21%	7%	15%
Confused	16%	23%	16%	13%	14%	14%	21%	13%
Disengaged	12%	14%	13%	11%	13%	10%	17%	12%
Ambivalent	5%	4%	6%	5%	4%	5%	6%	5%
Other	1%	0%	1%	1%	2%	1%	1%	1%
None of the above	4%	7%	3%	4%	1%	3%	5%	3%

When it comes to the current political climate, do you feel... Please select all that apply.

POLITICAL SENTIMENT

Republicans (49%) are more likely than Democrats (42%) and independents (30%) to be optimistic about the elections coming up in November.

Neither optimistic Somewhat pessimistic Very pessimistic Very optimistic Somewhat optimistic nor pessimistic 12% 18-64 Likely Voters 19% 23% 26% 21% 12% 24% 31% 21% 12% GenZers: 1997-2012 22% 26% 21% 20% 10% Millennials: 1981-1996 18% 26% 24% 20% 13% GenXers: 1965-1980 Baby Boomers: 1946-1964 19% 25% 22% 21% 13% PID: Dem 21% 21% 26% 21% 11% 9% 21% 32% 22% 16% PID: Ind 22% 27% 22% 19% PID: Rep 10% Educ: < College 19% 24% 30% 17% 10% Educ: Bachelors degree 15% 24% 24% 12% 26% 17% 25% Educ: Post-grad 25% 16% 17% 18% 24% 28% 19% 11% Income: Under 50k 16% 22% 25% 23% 13% Income: 50k-100k 24% 24% 22% 20% 11% Income: 100k+ 19% 22% 23% 23% 13% Ethnicity: White Ethnicity: Hispanic 18% 34% 19% 24% 5% 25% 30% 12% Ethnicity: Black 24% 10% Ethnicity: Asian + Other 8% 30% 34% 19% 8%

Are you feeling optimistic or pessimistic about the elections coming up in November?

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INFLUENCE OF POLITICAL ADS

Younger likely voters are significantly more likely than older voters to say political advertisements are influential on their decision to support a candidate. Additionally, likely voters with a higher income and education level are more likely to say political ads are influential.

Overall, how influential, if at all, are political advertisements on your decision to support a candidate?

	Very influential	Somewhat infl	uential Don't	know/No opinion	Not too influentia	I O Not influential a all
18-64 Likely Voters	18%	29	%	3%	26%	21%
GenZers: 1997-2012	18%		38%	6%	22%	17%
Millennials: 1981-1996	28%	0	29%	5%	23%	16%
GenXers: 1965-1980	14%	29%	7%	28	%	22%
Baby Boomers: 1946-1964	4% 18%	6%	33%		39	%
PID: Dem	24%		29%	5%	25%	18%
PID: Ind	6%	25%	9%	33%		27%
PID: Rep	19%		81%	5%	23%	21%
Educ: < College	17%	32	2%	9%	24%	18%
Educ: Bachelors degree	14%	25%	4%	32%		24%
Educ: Post-grad	28%	0	24%	21	%	26%
Income: Under 50k	16%	29%	9	%	26%	19%
Income: 50k-100k	15%	29%	5%	29 %	/o	22%
Income: 100k+	27%		28%		21%	23%
Ethnicity: White	17%	25%	6%	28%		25%
Ethnicity: Hispanic	19%		40%	7%	21%	13%
Ethnicity: Black	26%		36%		7% 19%	6 11%
Ethnicity: Asian + Other	12%	4	3%	6%	24%	15%

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Out of Home Political Ad Snapshot

68%

of likely voters have seen, heard, or read political advertising through an OOH ad.

49%

of likely voters who have been exposed to an OOH political ad in the past year (n=354) say OOH political ads are personally influential, including 20% who say it is *very influential.*

56%

of likely voters who have been exposed to an OOH political ad in the past year (n=354) say they trust political information in an OOH ad to be truthful and accurate.

Half of likely voters (50%) have seen an OOH political ad within the past month – exposure indexed highest among younger, more educated and higher income respondents.

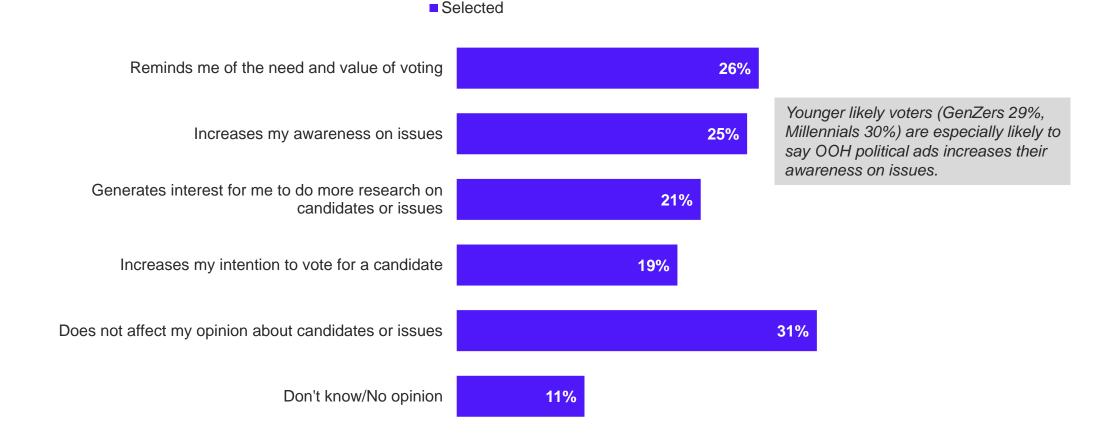
Lieux no conthe if at all have very access an aut of have a slitical advertise second

How	recently, if at all, have you	seen an out of home	political advertisemer	nt?	
	Less than a week ago	1 to 4 weeks ago	More than one month ago	Never D	on' know/Not sure
18-64 Likely Voters	26%	24%	18%	14%	17%
GenZers: 1997-2012	21%	34%	20%	13%	12%
Millennials: 1981-1996	27%	28%	17%	13%	15%
GenXers: 1965-1980	27%	18%	19%	17%	19%
Baby Boomers: 1946-1964	27%	17%	17%	15%	23%
PID: Dem	28%	26%	18%	13%	15%
PID: Ind	23%	21%	20%	13%	22%
PID: Rep	25%	24%	17%	17%	16%
Educ: < College	21%	24%	18%	18%	19%
Educ: Bachelors degree	32%	22%	17%	13%	16%
Educ: Post-grad	31%	28%		21% 7	/ 13%
Income: Under 50k	23%	21%	20%	17%	19%
Income: 50k-100k	27%	27%	17%	11%	17%
Income: 100k+	31%	25%	17%	13%	14%
Ethnicity: White	26%	23%	18%	15%	18%
Ethnicity: Hispanic	23%	33%	19%	13%	13%
Ethnicity: Black	30%	23%	19%	11%	17%
Ethnicity: Asian + Other	23%	26%	20%	15%	16%

*The following was provided to respondents before answer this question: The following questions will focus on **out of home advertising, also known as outdoor advertising**. The distinguishing factor of this form of advertising is that it is experienced outside of the home. Out of home advertising includes billboards, mobile billboards, buses, bus stops, subways, airports, taxis, arenas and stadiums, movie theaters, gas stations, outdoor digital and video screens, posters, and other advertisement signage seen while outside.

A quarter of likely voters say OOH political ads remind them of the need and value of voting (26%) and increase their awareness on issues (25%).

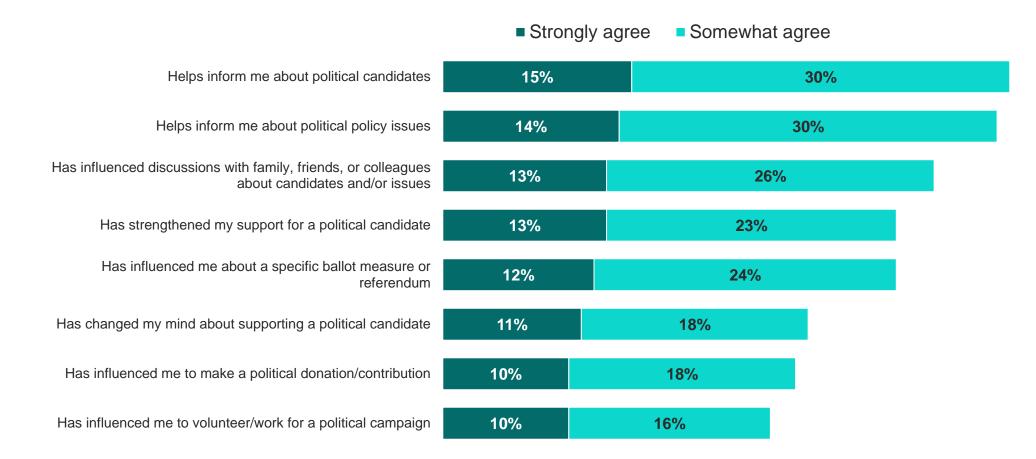
Thinking about out of home advertising for political advertising, which of the following describes your view? Out of home advertising for political campaigns ... Please select all that apply.



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Nearly half of likely voters agree OOH political advertising helps inform them about political candidates (45%) and policy issues (44%).

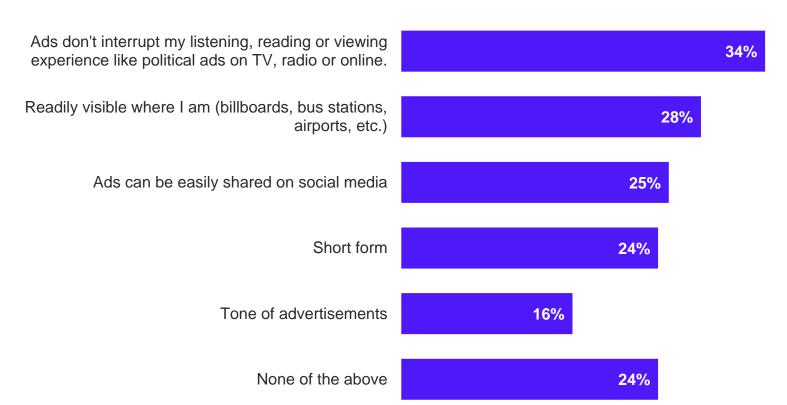
Do you agree or disagree with the following statements about out of home political advertising? Out of home political advertising...



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Likely voters find OOH political ads appealing because the ads: don't interrupt their listening, reading or viewing experience like most other political ads (34%); are readily visible (28%); are easily shared on social media (25%); and are short form (24%).

Thinking about out of home advertising for political advertising, what do you like, if anything, about this form of advertising? Please select all that apply.



Selected

Younger likely voters, Democrats, post-grad, and high- income voters are more likely than their counterparts to say a celebrity would make them more likely to engage with the ad.

If a celebrity appeared in an out of home advertisement and endorsed a political candidate, would that make you more or less likely to engage with the advertisement?

•	Much more likely	Somev likely	vhat more	Neither more nor less likely	Somewhat less likely	Much le	ess likely	Don't know opinion
18-64 Likely Voters	13%	18%		45%	6	6%	10%	8%
GenZers: 1997-2012	12%		32%		32%	6%	11%	8%
Millennials: 1981-1996	22%		22%		35%		5% 8%	7%
GenXers: 1965-1980	8% 14	%		53%		8%	9%	9%
Baby Boomers: 1946-1964	8%			60%		5%	15%	9%
PID: Dem	19%		21%		41%		6% 7%	6%
PID: Ind	4% 17%	D D		48%		6%	13%	11%
PID: Rep	11%	16%		46%		8%	11%	9%
Educ: < College	10%	17%		47%		7%	8%	10%
Educ: Bachelors degree	11%	20%		45	%	5%	11%	7%
Educ: Post-grad	24%		19%		35%	6	<mark>% 12</mark> %	6 4%
Income: Under 50k	10%	17%		46%		7%	9%	12%
Income: 50k-100k	9%	21%		479	/o	60	<mark>% 10</mark> %	7%
Income: 100k+	23%		18%		38%		<mark>6%</mark> 11	<mark>% 4%</mark>
Ethnicity: White	13%	16%		46%		7%	11%	9%
Ethnicity: Hispanic	12%	26	%		42%		6% 7%	8%
Ethnicity: Black	18%		24%		39%		5% 6%	7%
Ethnicity: Asian + Other	7%	26%		439	%	7%	9%	9%

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GET OUT THE VOTE CAMPAIGN

Democrats (44%), those with a post-grad degree (47%), and higher income likely voters (45%) are most likely to have been exposed to GOTV campaigns over the past 3 months.

As you may know, "Get out the vote" or "getting out the vote" (GOTV) describes efforts aimed at increasing the voter turnout in elections. Over the past 3 months, have you seen, read, or heard ad messages oriented to 'get out the vote' campaigns?

Yes

Don't know/No opinion

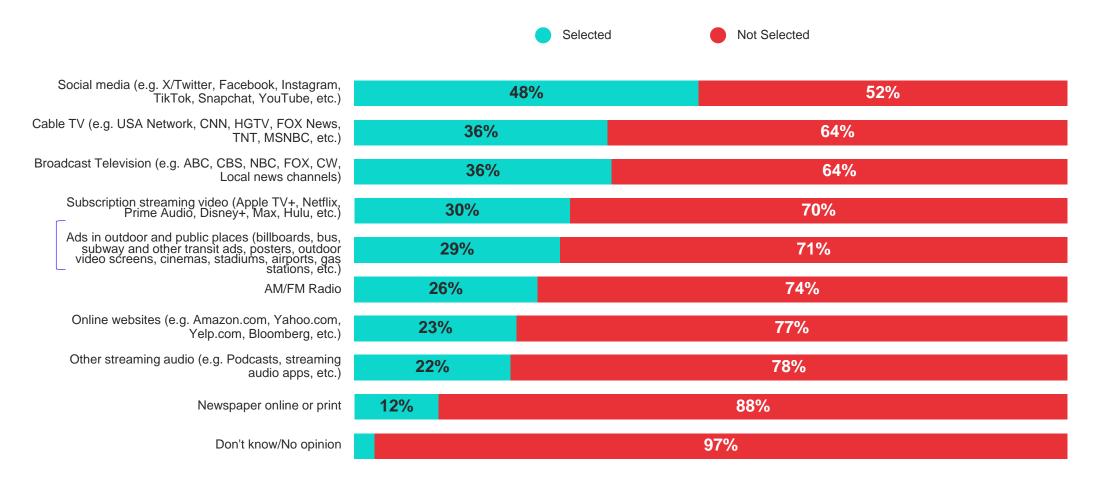
No

		res	Don't know/No opinion	NO
18-64 Li	ikely Voters	38%	11%	50%
GenZers:	1997-2012	42%	13%	46%
Millennials:	1981-1996	43%	9%	47%
GenXers:	1965-1980	33%	13%	54%
Baby Boomers:	1946-1964	39%	7%	54%
	PID: Dem	44%	10%	46%
	PID: Ind	30%	12%	58%
	PID: Rep	38%	11%	51%
Edu	c: < College	36%	13%	51%
Educ: Bache	lors degree	38%	10%	53%
Edu	c: Post-grad	47%	7%	46%
Income	: Under 50k	36%	14%	50%
Income	e: 50k-100k	38%	9%	53%
Inco	ome: 100k+	45%	8%	47%
Ethi	nicity: White	37%	10%	53%
Ethnicit	ty: Hispanic	44%	15%	42%
Ethn	nicity: Black	44%	12%	44%
Ethnicity: Asi	an + Other	34%	14%	52%

GET OUT THE VOTE CAMPAIGN

Nearly a third (29%) of those who have seen GOTV campaigns saw it in an OOH ad.

Where have you seen 'get out the vote' campaigns over the past 3 months? Please select all that apply. Among those who have seen GOTV campaigns, n=622

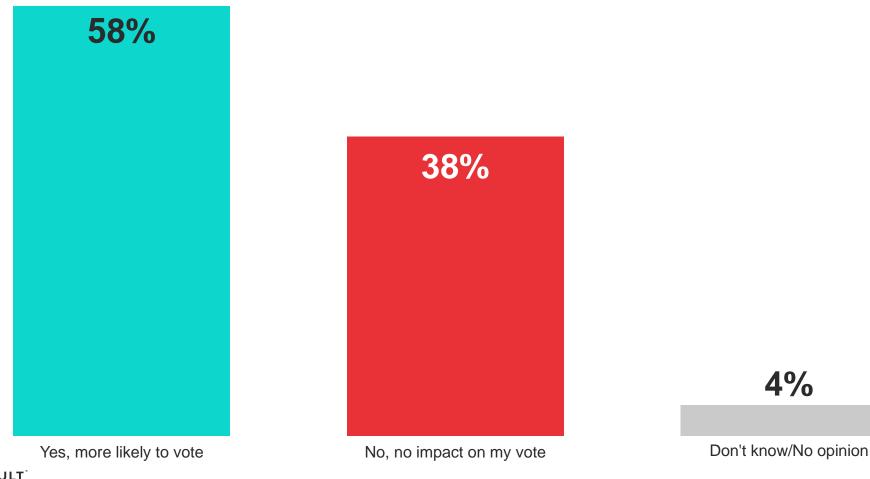


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GET OUT THE VOTE CAMPAIGN

A majority (58%) of those exposed to GOTV campaigns say it made them *more likely* to vote.

Did exposure to the 'get out the vote' campaign increase your likelihood to vote? *Among those who have seen GOTV campaigns, n=622*



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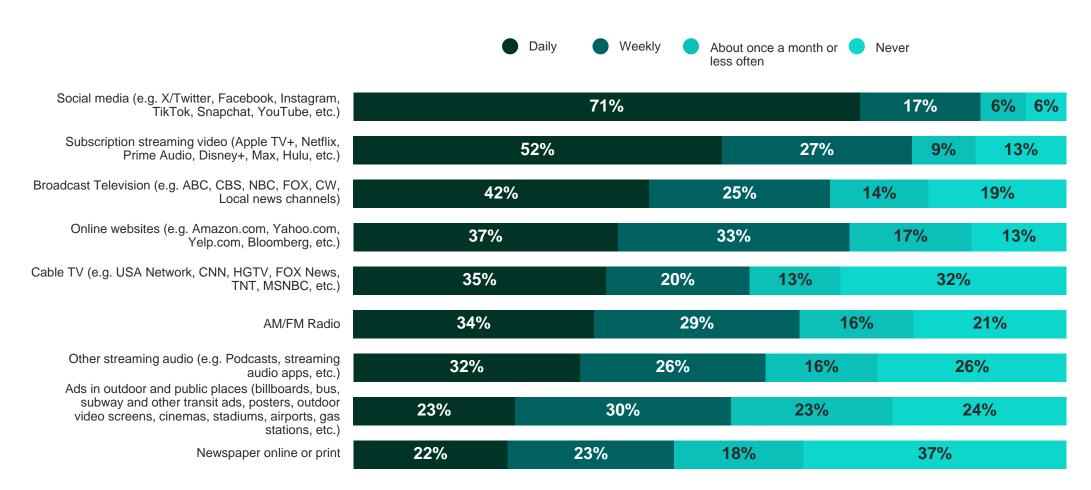
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How often do you consume information through each of the following?



How often do you consume information through each of the following?

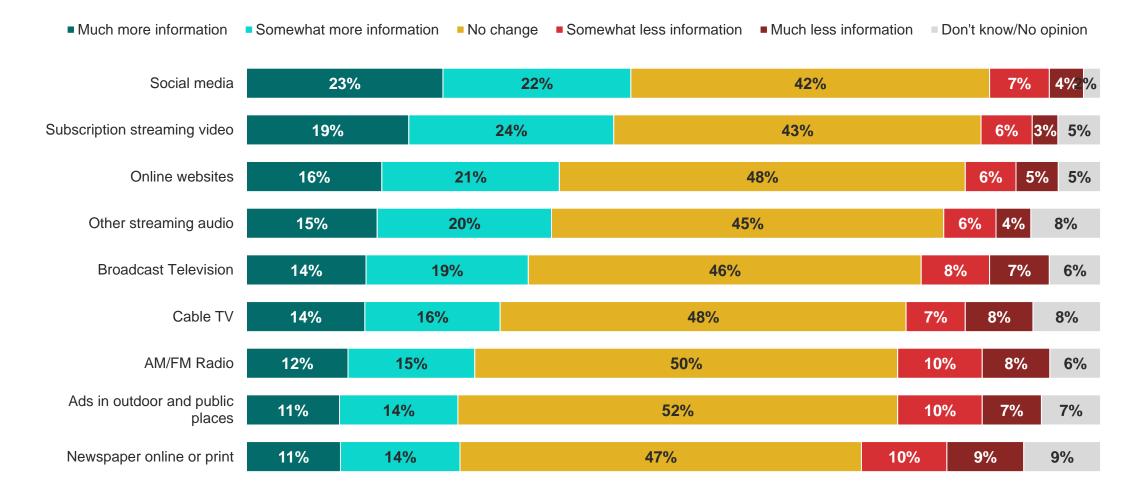
% Daily + Weekly	Ads in outdoor and public places	AM/FM Radio	Broadcast Television	Cable TV	Subscription streaming video	Social media	Online websites	Other streaming audio	Newspaper online or print
18-64 Likely Voters	53%	63%	67%	55%	79%	88%	70%	58%	45%
GenZers: 1997-2012	57%	48%	50%	48%	86%	90%	72%	70%	34%
Millennials: 1981-1996	60%	65%	64%	56%	83%	91%	77%	71%	51%
GenXers: 1965-1980	47%	68%	72%	57%	76%	87%	65%	49%	43%
Baby Boomers: 1946-1964	44%	56%	77%	57%	64%	79%	61%	38%	45%
PID: Dem	57%	59%	69%	57%	80%	86%	69%	58%	49%
PID: Ind	51%	58%	62%	51%	79%	86%	71%	57%	45%
PID: Rep	50%	70%	67%	57%	75%	91%	70%	58%	40%
Educ: < College	48%	60%	66%	53%	78%	87%	62%	55%	37%
Educ: Bachelors degree	55%	62%	68%	58%	79%	88%	78%	58%	51%
Educ: Post-grad	64%	70%	67%	58%	79%	90%	79%	68%	59%
Income: Under 50k	45%	57%	62%	49%	74%	86%	60%	52%	37%
Income: 50k-100k	59%	66%	70%	57%	81%	90%	76%	59%	48%
Income: 100k+	59%	69%	73%	66%	81%	89%	79%	68%	57%
Ethnicity: White	53%	65%	67%	55%	79%	89%	70%	58%	46%
Ethnicity: Hispanic	60%	66%	66%	60%	87%	91%	71%	74%	42%
Ethnicity: Black	56%	59%	72%	63%	79%	87%	66%	63%	42%
Ethnicity: Asian + Other	44%	52%	58%	47%	75%	86%	72%	54%	40%

How often do you consume information through each of the following?

Which word(s) best describes each of the following media sources? Please select UP TO THREE for each platform.

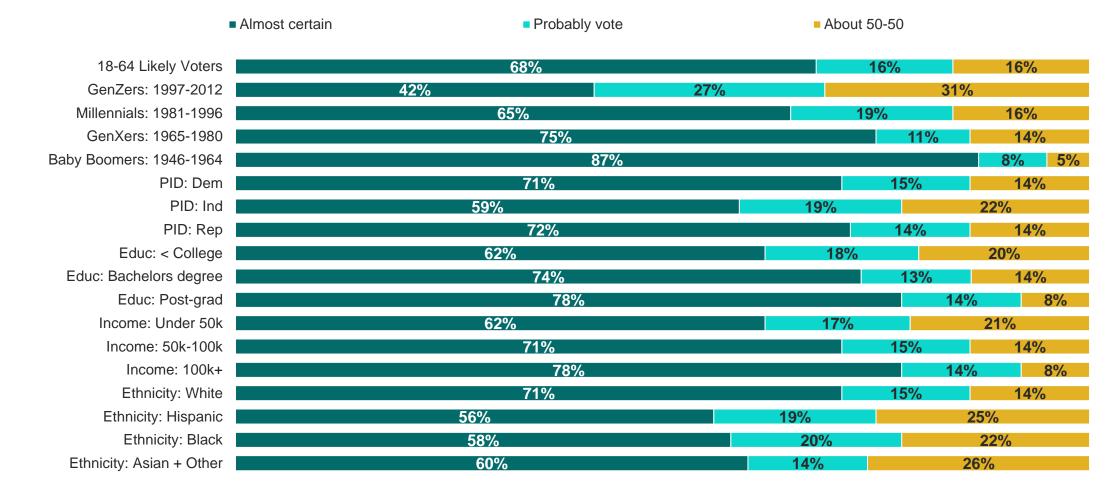
% Selected	Ads in outdoor and public places	AM/FM Radio	Broadcast Television	Cable TV	Subscription streaming video	Social media	Online websites	Other streaming audio	Newspaper online or print
Informative	53%	50%	54%	49%	35%	38%	53%	49%	60%
Entertaining	34%	55%	38%	43%	68%	52%	36%	54%	25%
Influential	30%	23%	30%	29%	29%	35%	34%	33%	27%
Authentic	23%	28%	23%	22%	26%	16%	26%	24%	28%
Trustworthy	19%	25%	29%	24%	24%	17%	27%	21%	32%
Polarizing	12%	9%	15%	17%	10%	19%	13%	13%	13%
Dangerous	10%	5%	14%	14%	6%	26%	9%	9%	10%
Irresponsible	10%	6%	14%	15%	7%	22%	9%	10%	11%

And in comparison to a year ago, are you consuming more or less information through each of the following?



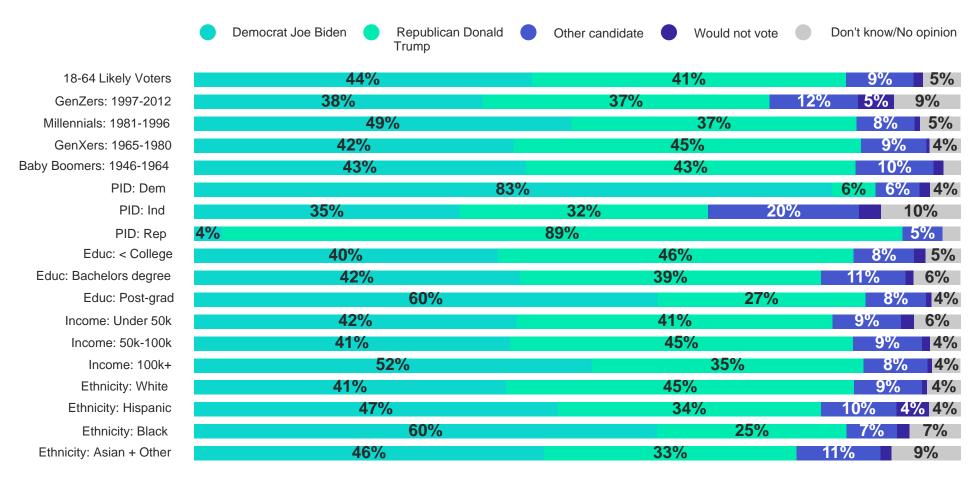
APPENDIX: VOTING BEHAVIORS

In November of 2024 there will be a presidential election and elections for U.S. Senate, U.S. Congress, and most state and local offices. As things stand now, how likely are you to vote in the November 2024 election?



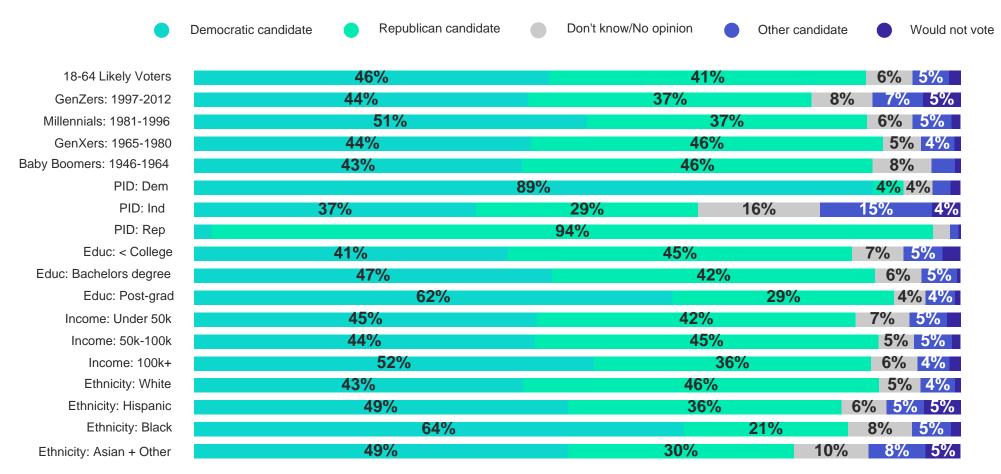
APPENDIX: VOTING BEHAVIORS

If the November 2024 election for U.S. president were held today, which one of the following candidates are you most likely to vote for?



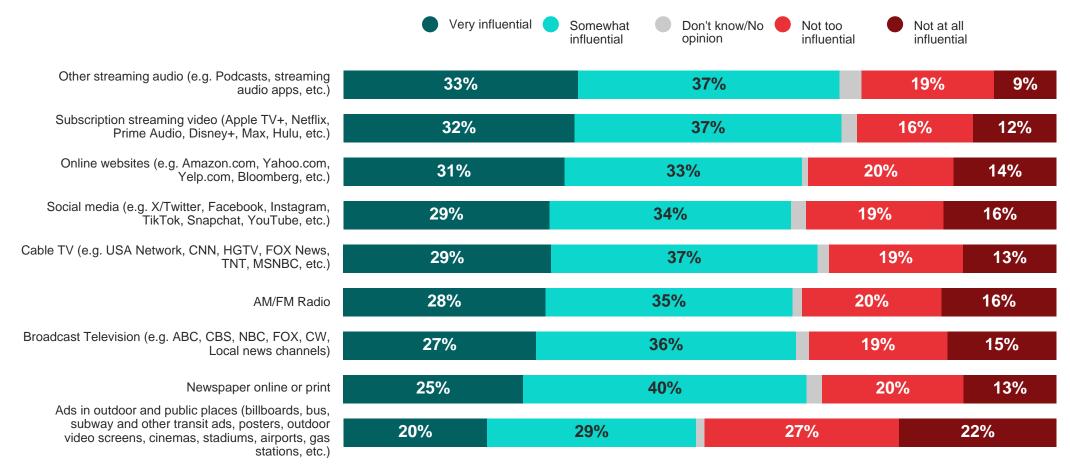
APPENDIX: VOTING BEHAVIORS

If the November 2024 election for U.S. Congress, including U.S. Senate or House of Representatives, in your district was held today, which one of the following candidates are you most likely to vote for?



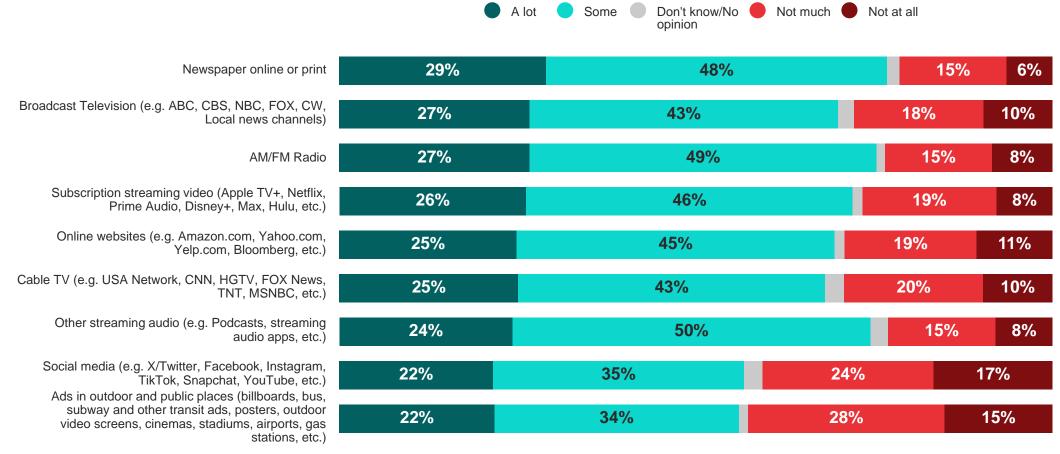
APPENDIX: INFLUENCE OF POLITICAL ADS

More specifically, how influential with, if at all, are each of the following media sources when it comes to political advertising for you personally? *N size varies, among those who have you seen, heard, or read political advertising on the media source in the past year.



APPENDIX: INFLUENCE OF POLITICAL ADS

How much do you personally trust, if at all, the following media sources when it comes to political information to provide truthful and accurate information? **N* size varies, among those who have you seen, heard, or read political advertising on the media source in the past year



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"Influence of OOH Political Ads" was sponsored by The Foundation for Outdoor Advertising Research and Education (FOARE), a 501 (c) (3) not for profit, charitable organization.