



Influence of Out of Home Political Ads

 MARCH 2024



Key Takeaways

1 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.

3 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.

4 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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MEDIA LANDSCAPE

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?

53%

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?

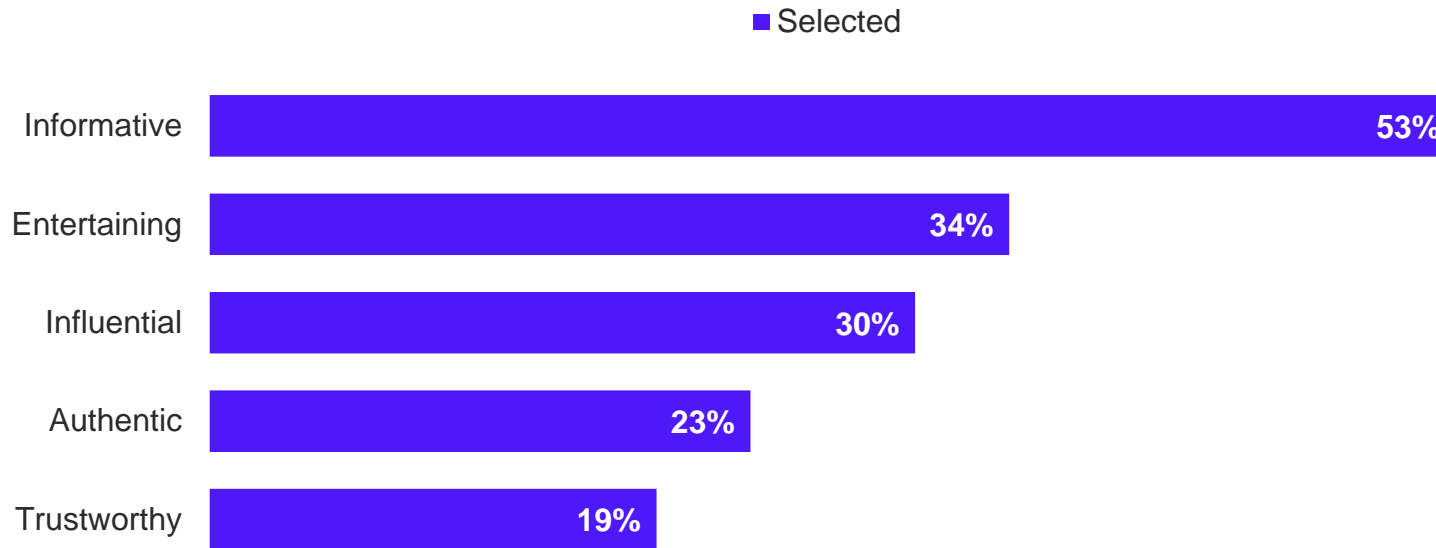
25%

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

MEDIA LANDSCAPE

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.)



MEDIA LANDSCAPE

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.

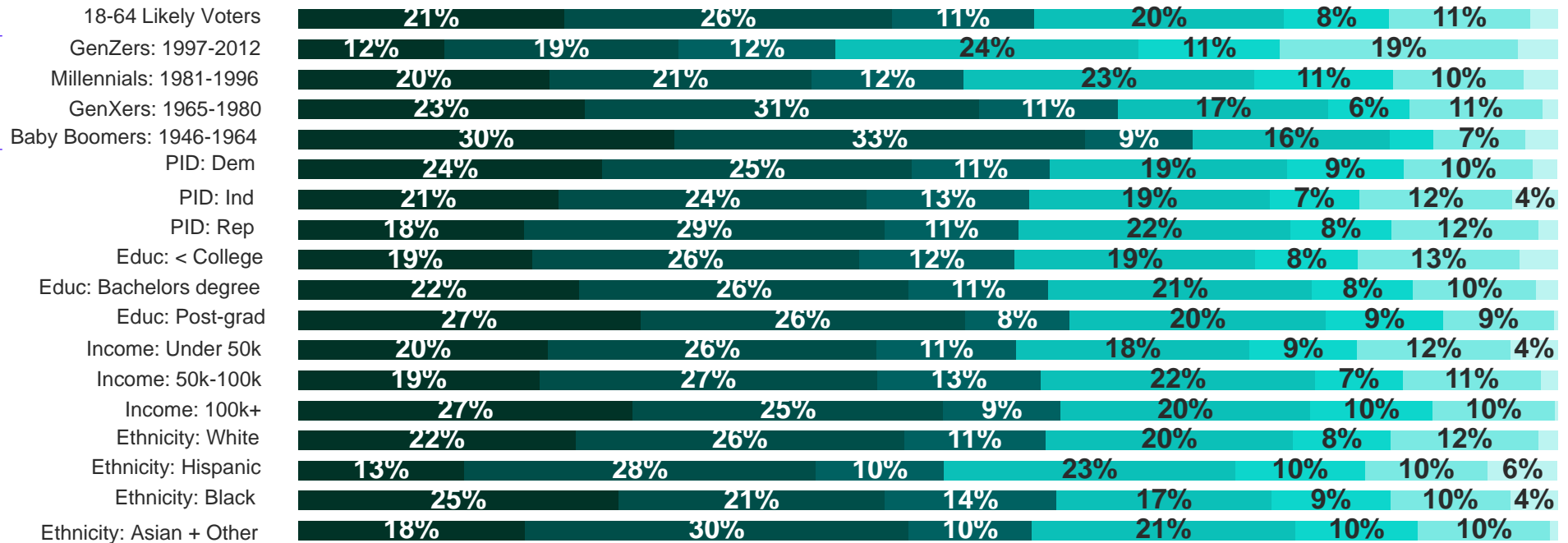
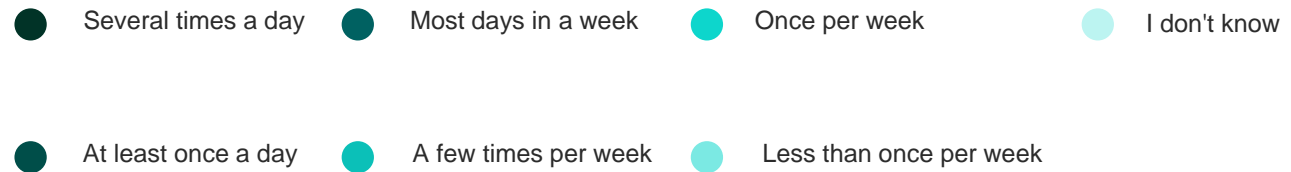
Which word(s) best describes each of the following media sources? Please select UP TO THREE for each platform.

% 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%

MEDIA LANDSCAPE

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'*



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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.

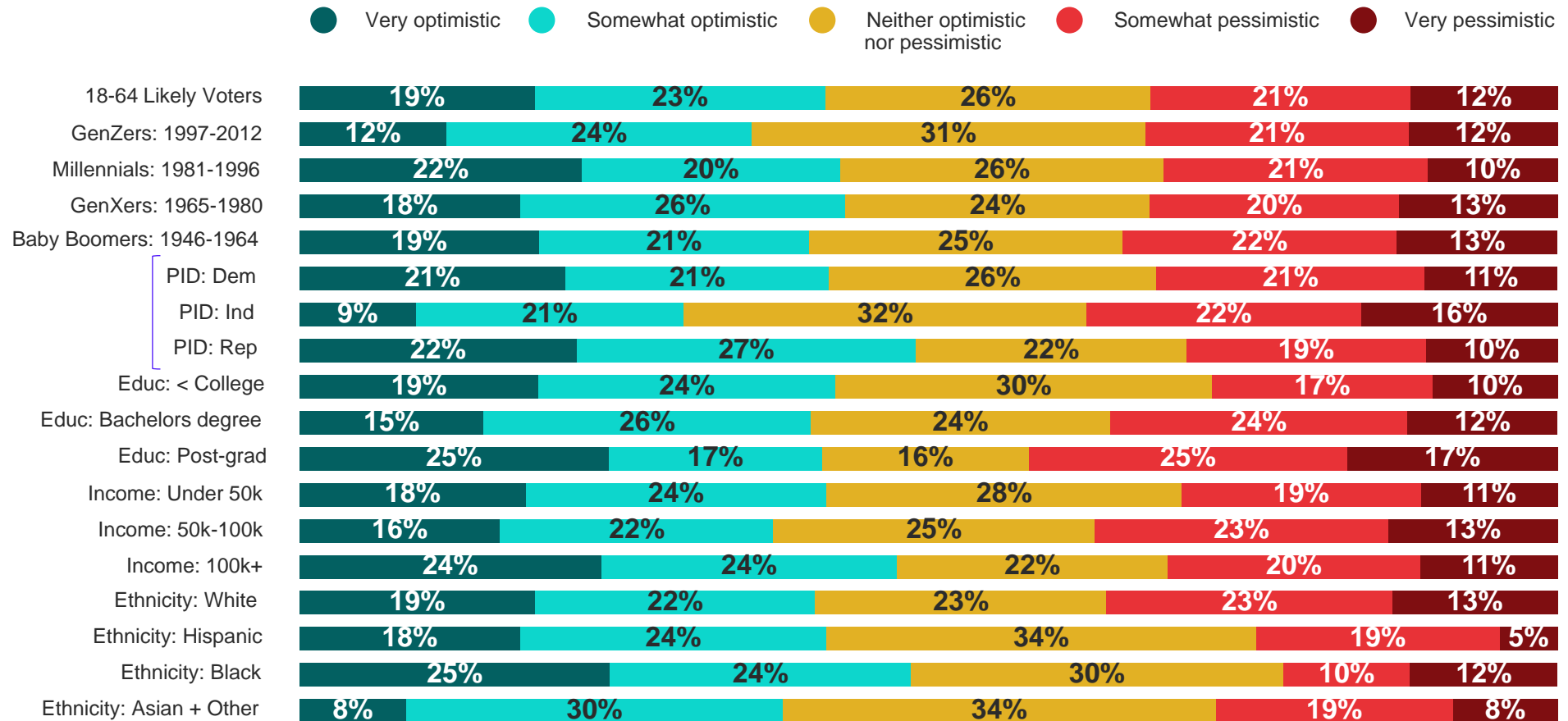
When it comes to the current political climate, do you feel... Please select all that apply.

<i>% Selected</i>	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%

POLITICAL SENTIMENT

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

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



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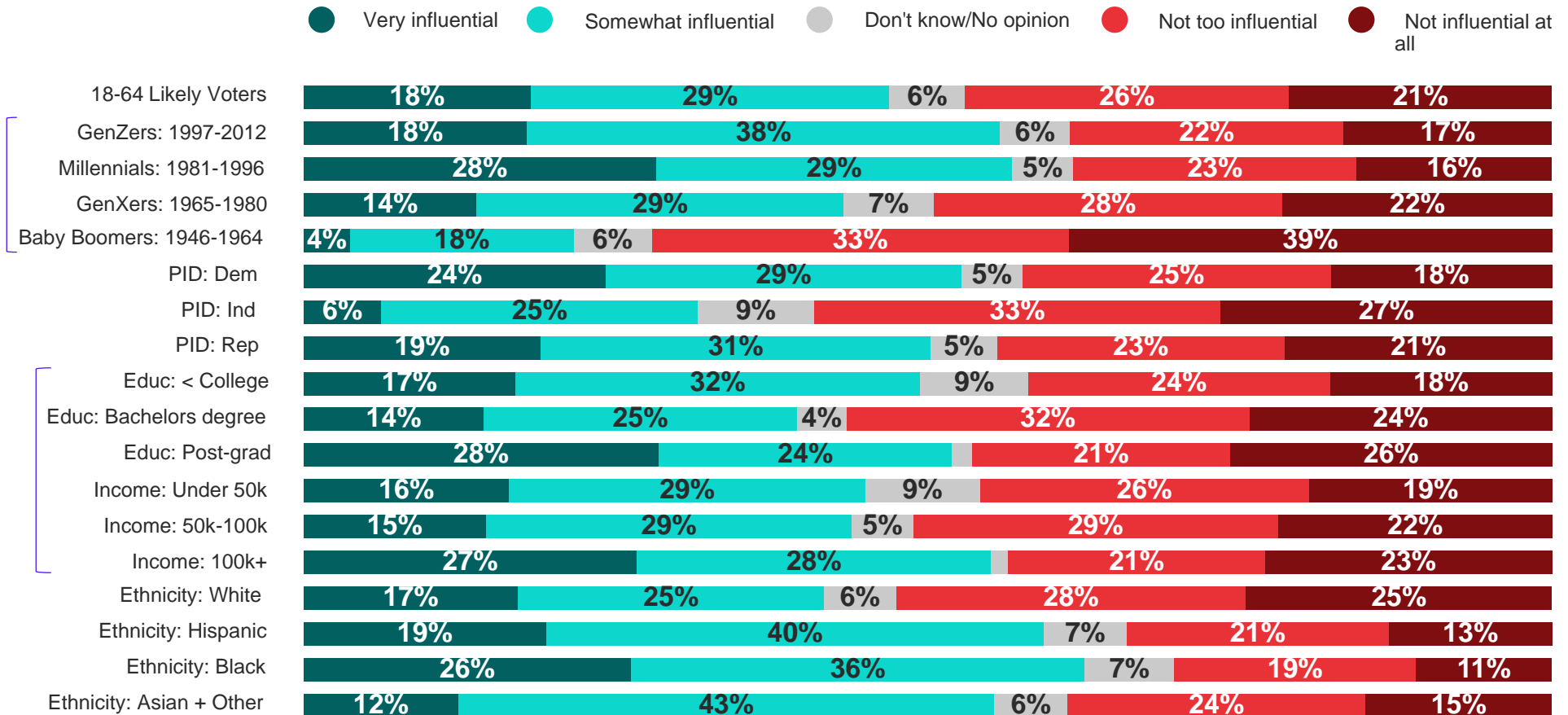
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INFLUENCE OF POLITICAL ADS

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?



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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%

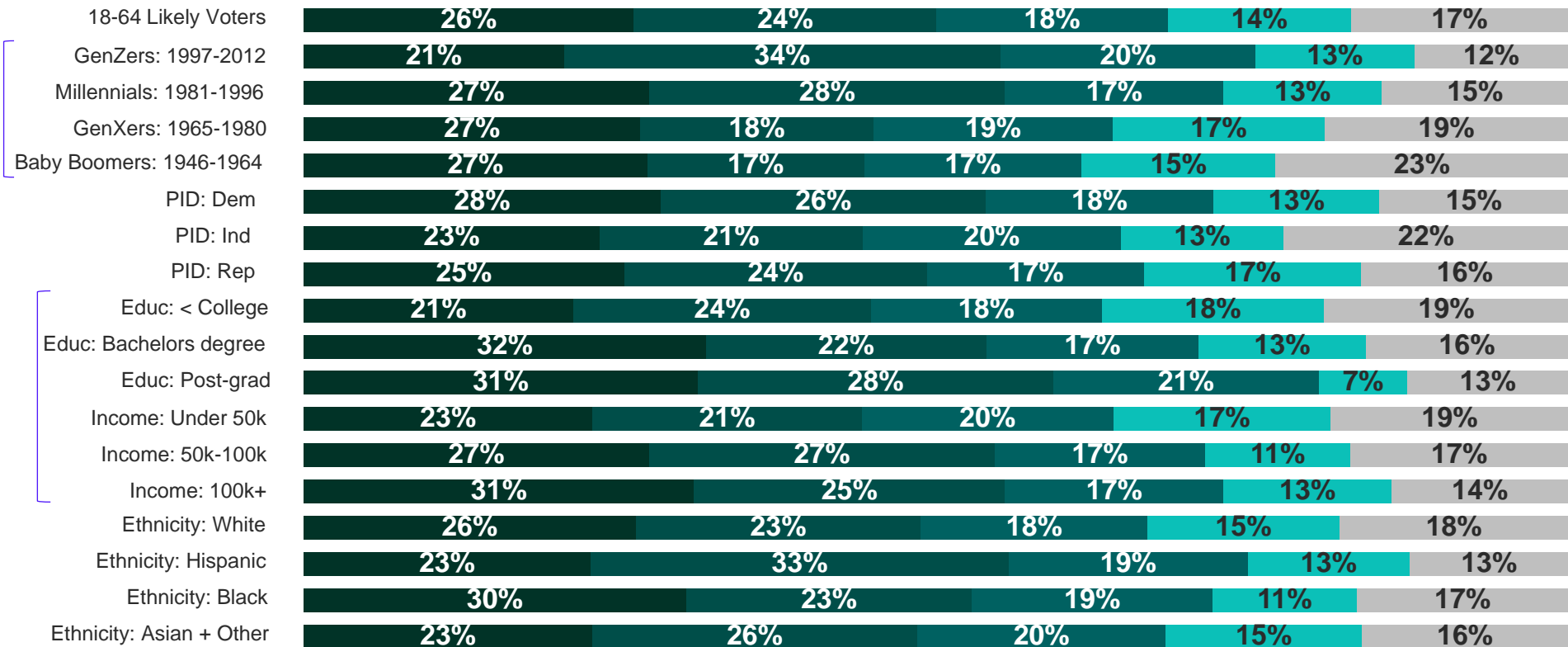
of likely voters who have been exposed to an OOH political ad in the past year (n=354) say they trust political information in an OOH ad to be truthful and accurate.

VALUE OF OOH POLITICAL ADS

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.

How recently, if at all, have you seen an out of home political advertisement?

● Less than a week ago
 ● 1 to 4 weeks ago
 ● More than one month ago
 ● Never
 ● Don't know/Not sure

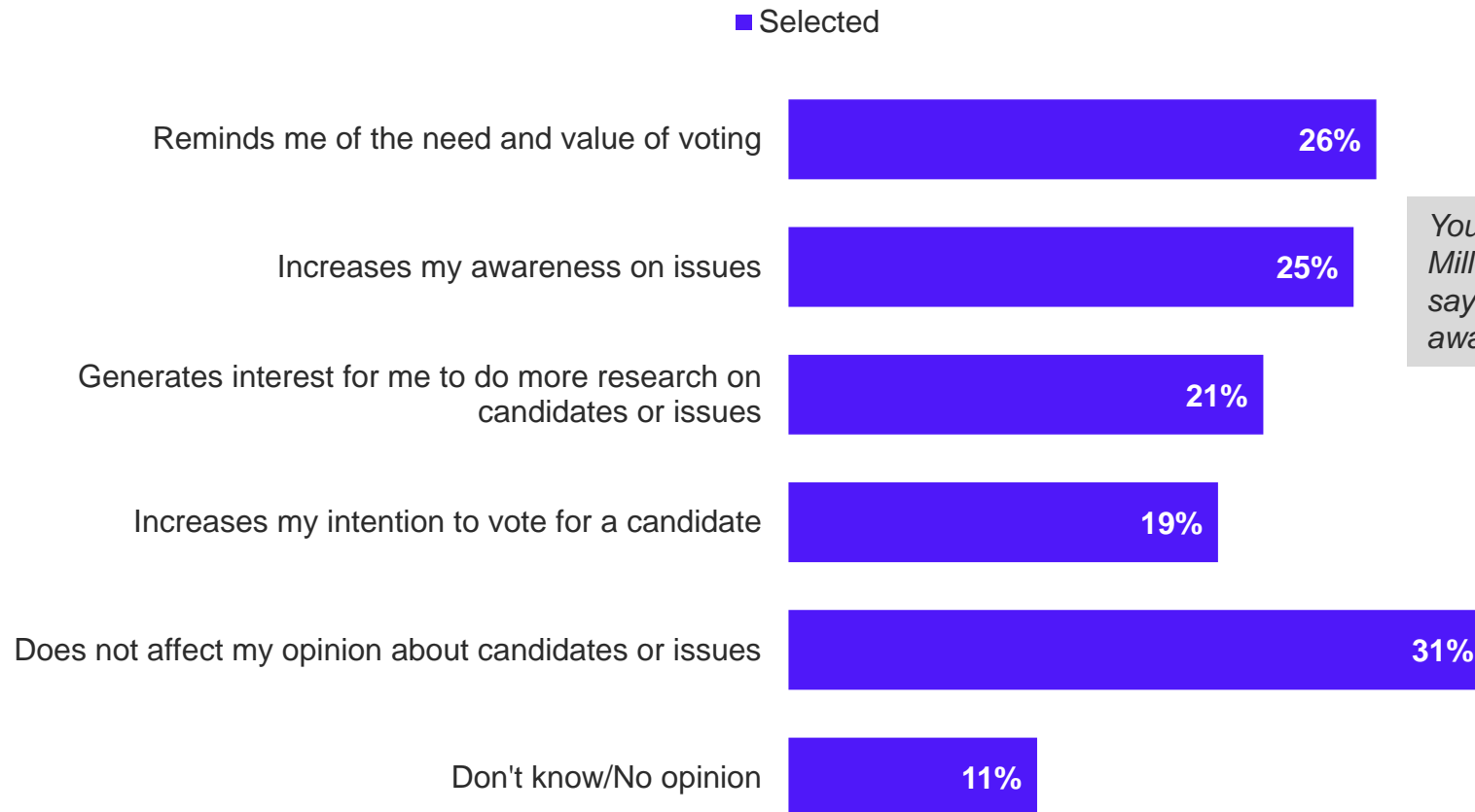


*The following was provided to respondents before answer this question: The following questions will focus on **out of home advertising, also known as outdoor advertising**. The distinguishing factor of this form of advertising is that it is experienced outside of the home. Out of home advertising includes 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.

VALUE OF OOH POLITICAL ADS

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.

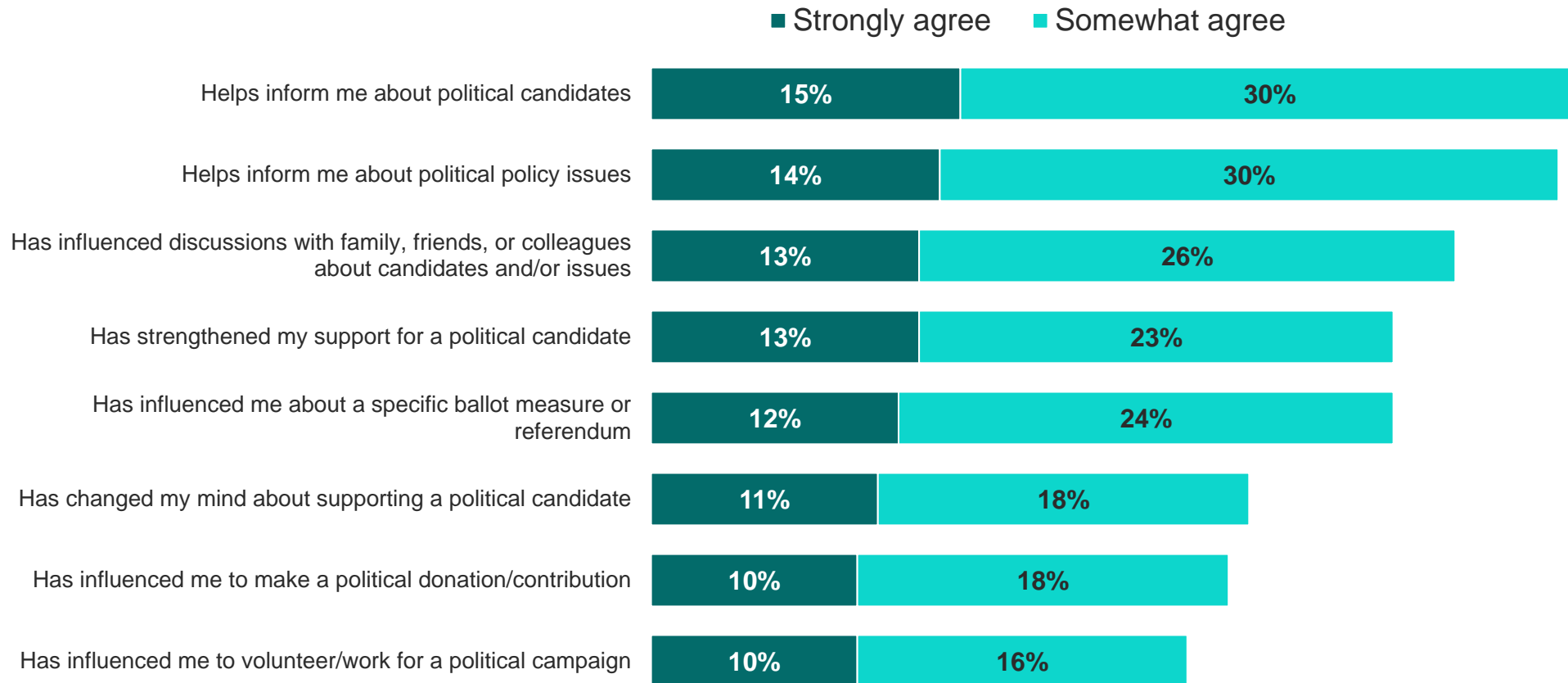


Younger likely voters (GenZers 29%, Millennials 30%) are especially likely to say OOH political ads increases their awareness on issues.

VALUE OF OOH POLITICAL ADS

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

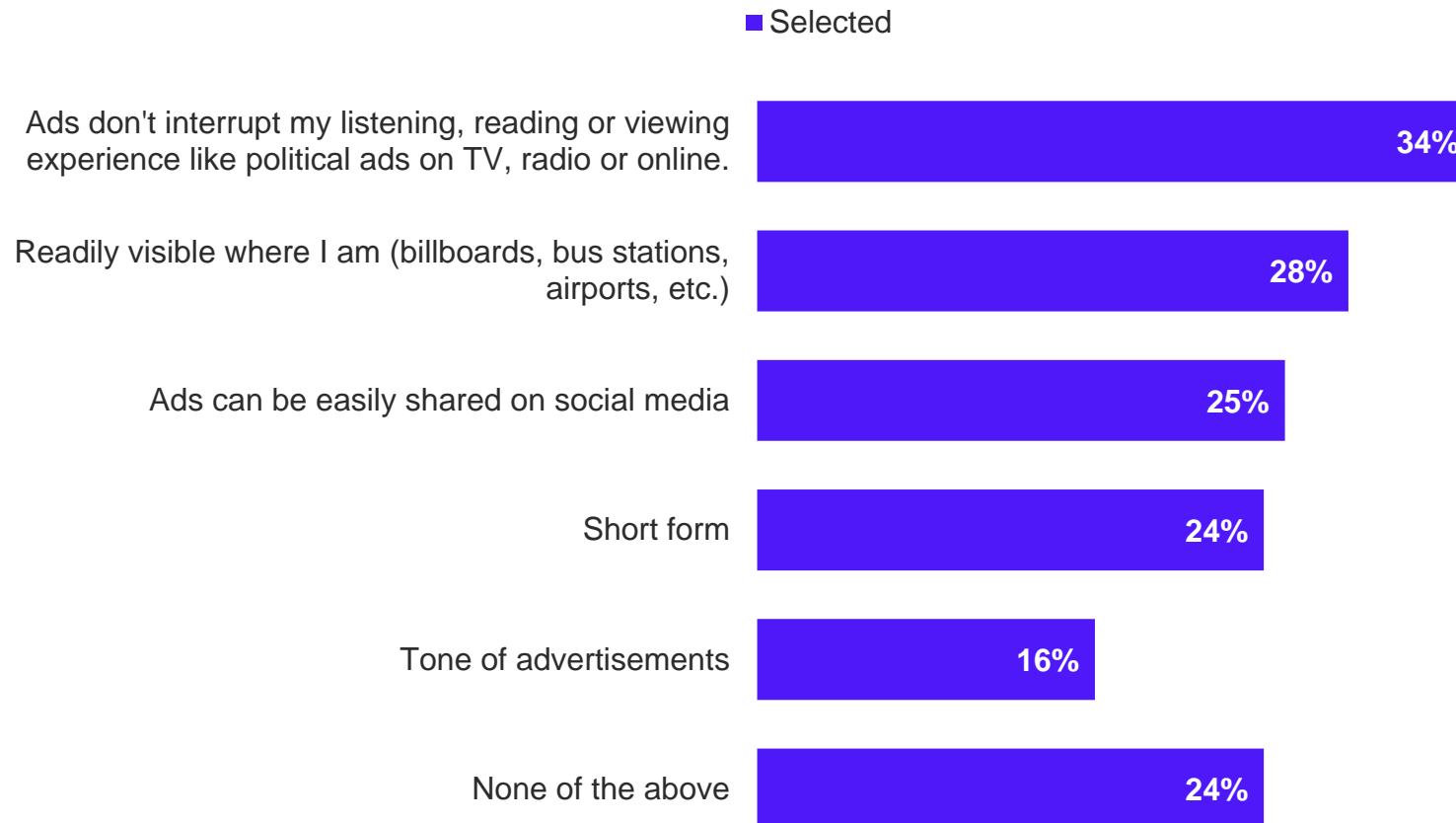
Do you agree or disagree with the following statements about out of home political advertising? Out of home political advertising...



VALUE OF OOH POLITICAL ADS

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%).

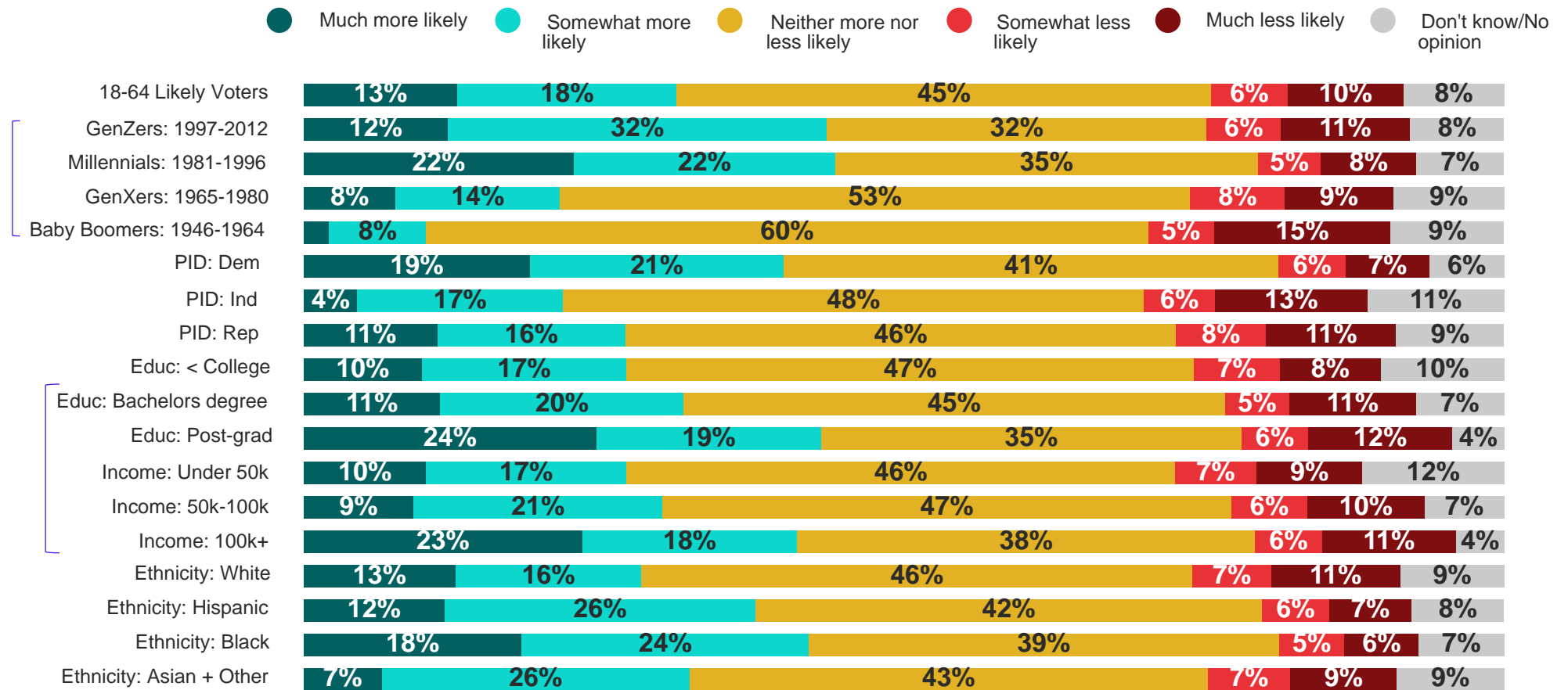
Thinking about out of home advertising for political advertising, what do you like, if anything, about this form of advertising? Please select all that apply.



VALUE OF OOH POLITICAL ADS

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?



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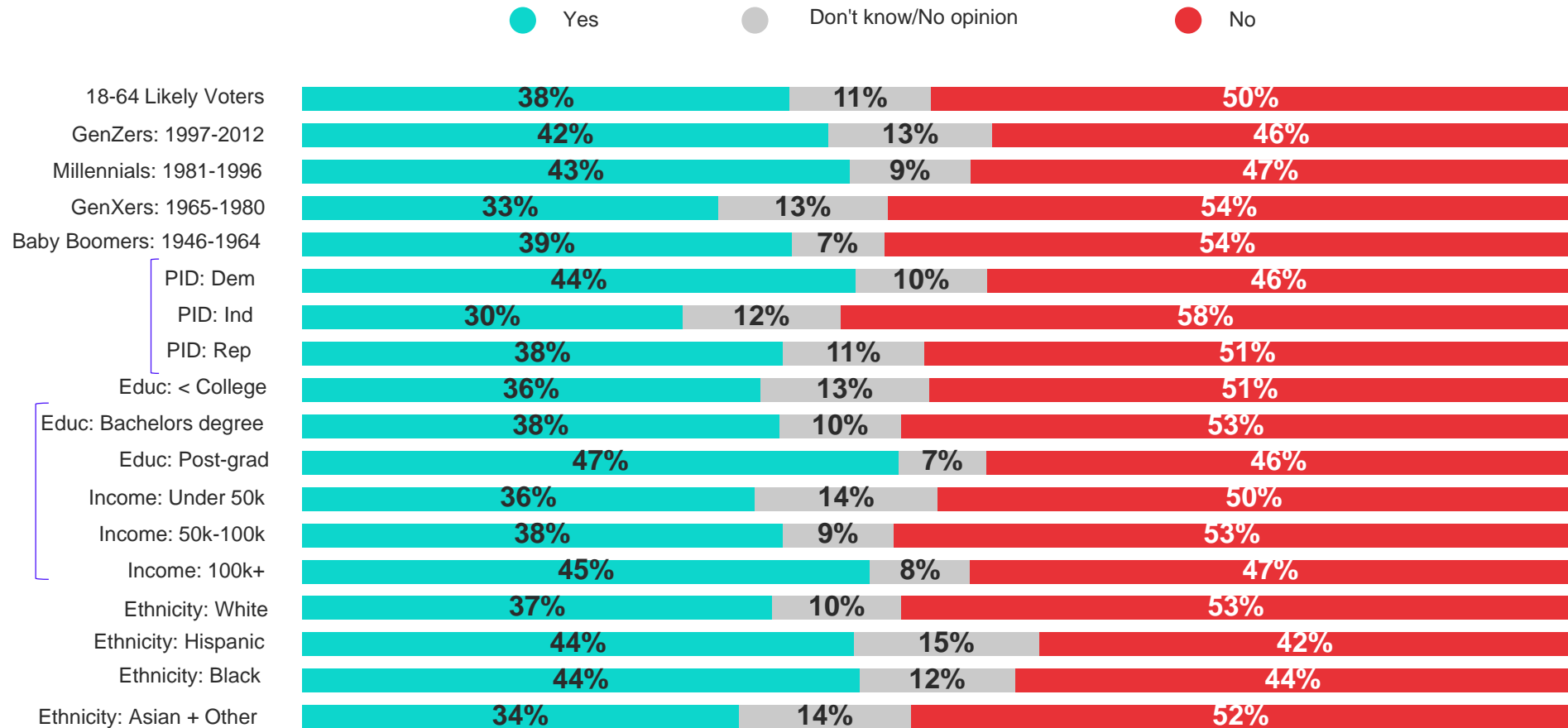
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GET OUT THE VOTE CAMPAIGN

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.

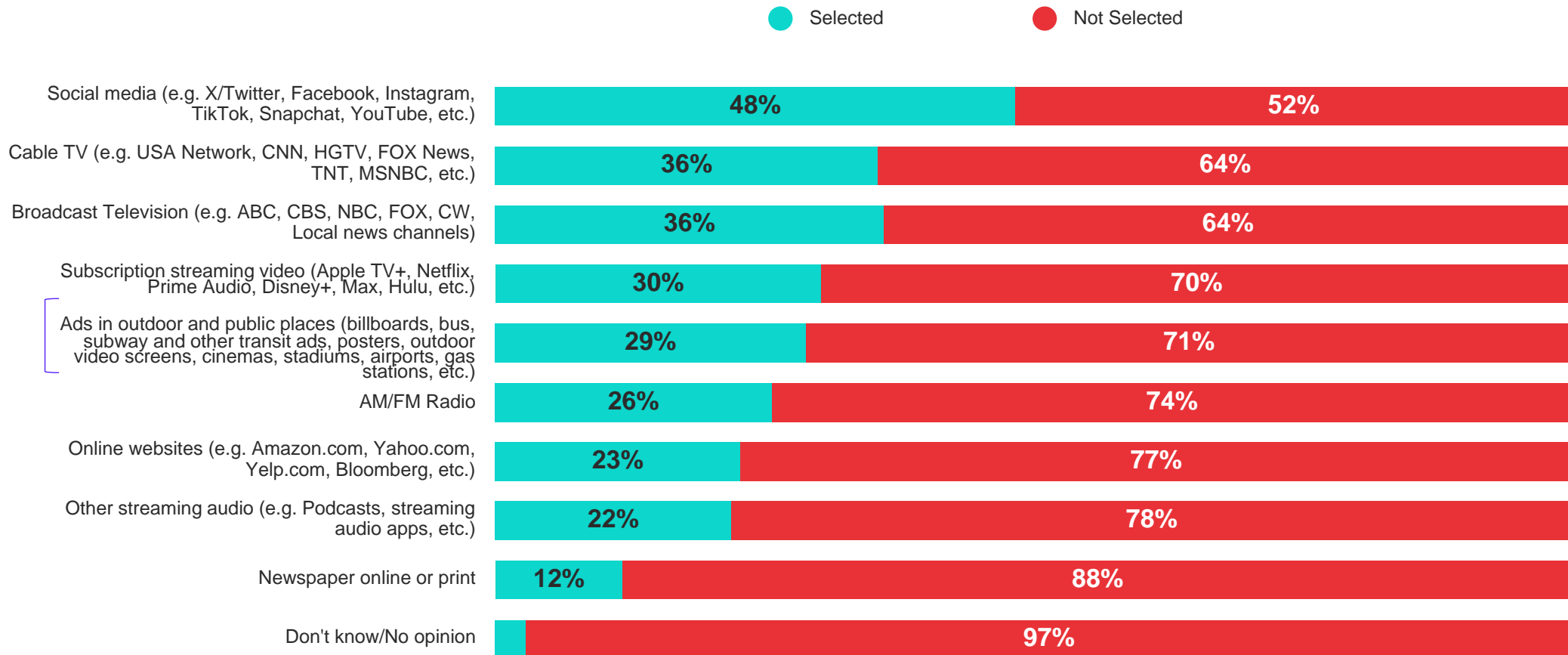
As you may know, "Get out the vote" or "getting out the vote" (GOTV) describes efforts aimed at increasing the voter turnout in elections. Over the past 3 months, have you seen, read, or heard ad messages oriented to 'get out the vote' campaigns?



GET OUT THE VOTE CAMPAIGN

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

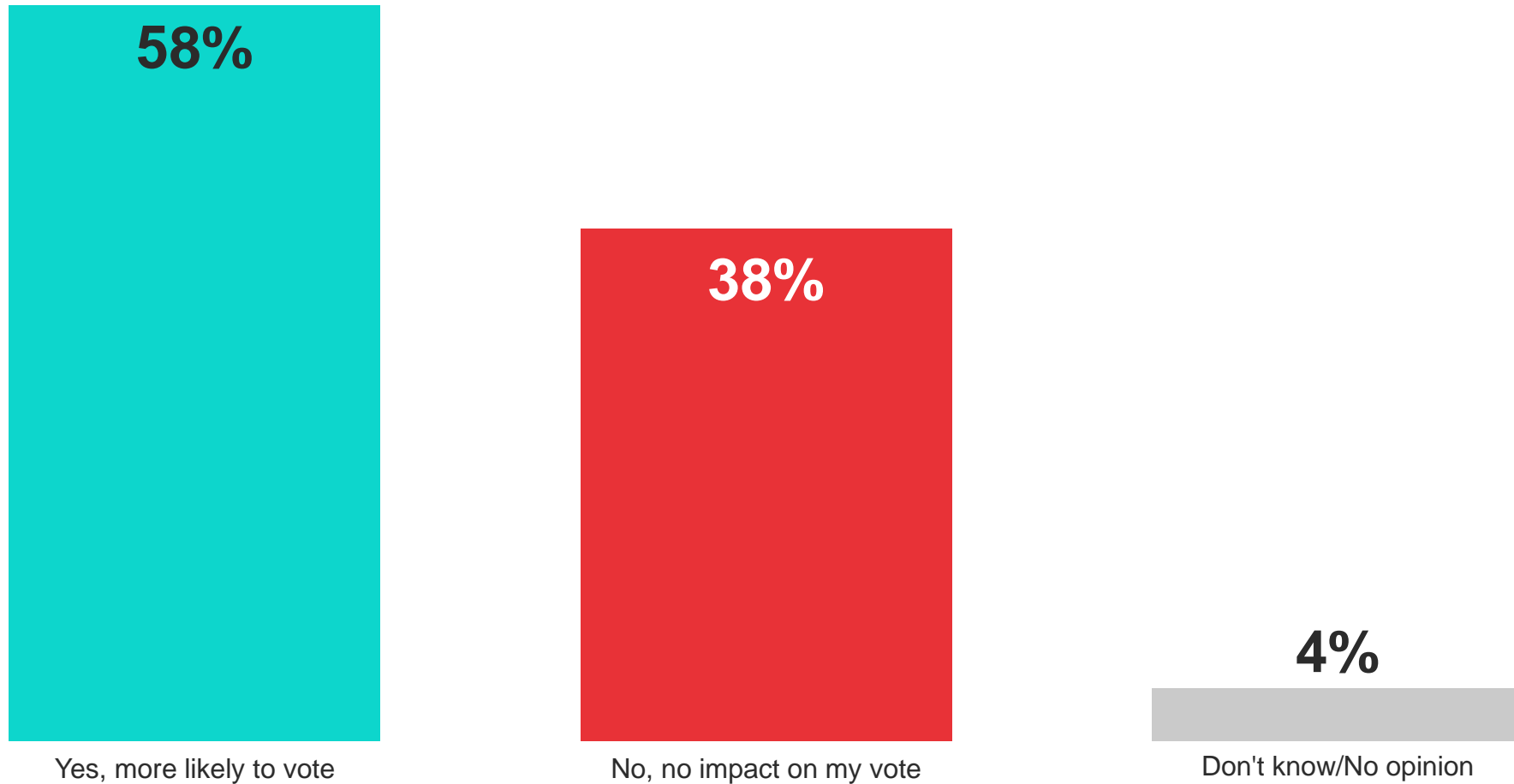
Where have you seen 'get out the vote' campaigns over the past 3 months? Please select all that apply.
Among those who have seen GOTV campaigns, n=622



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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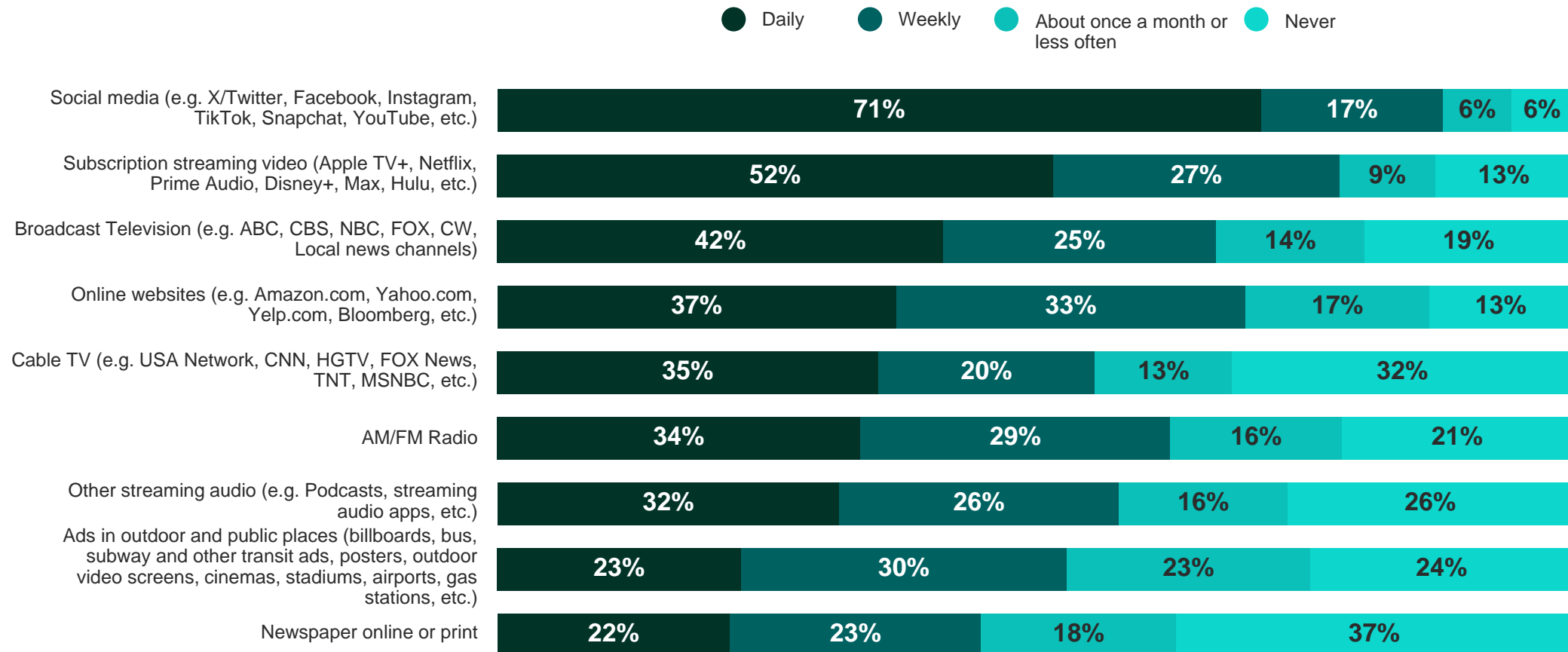
Get Out The Vote Campaigns

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APPENDIX: MEDIA LANDSCAPE

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



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<i>% Daily + Weekly</i>	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%

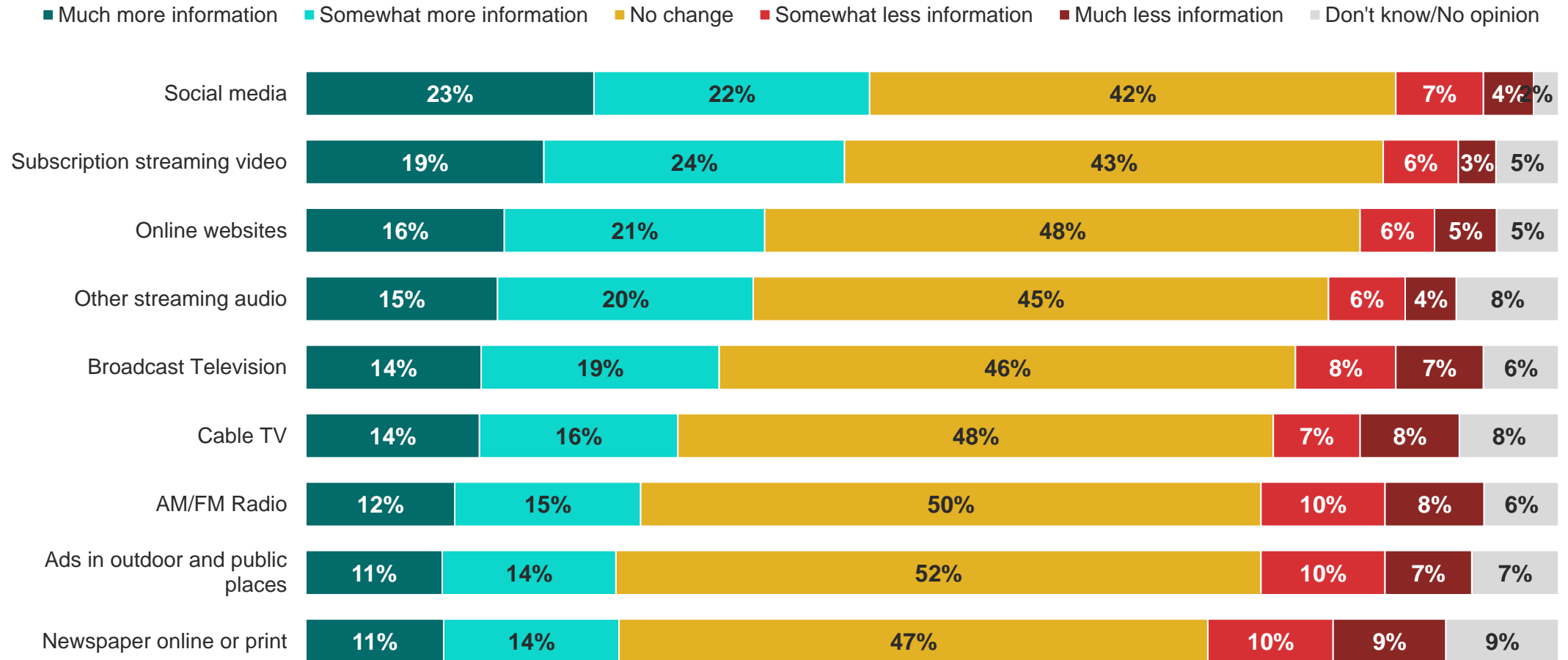
APPENDIX: MEDIA LANDSCAPE

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

<i>% Selected</i>	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%

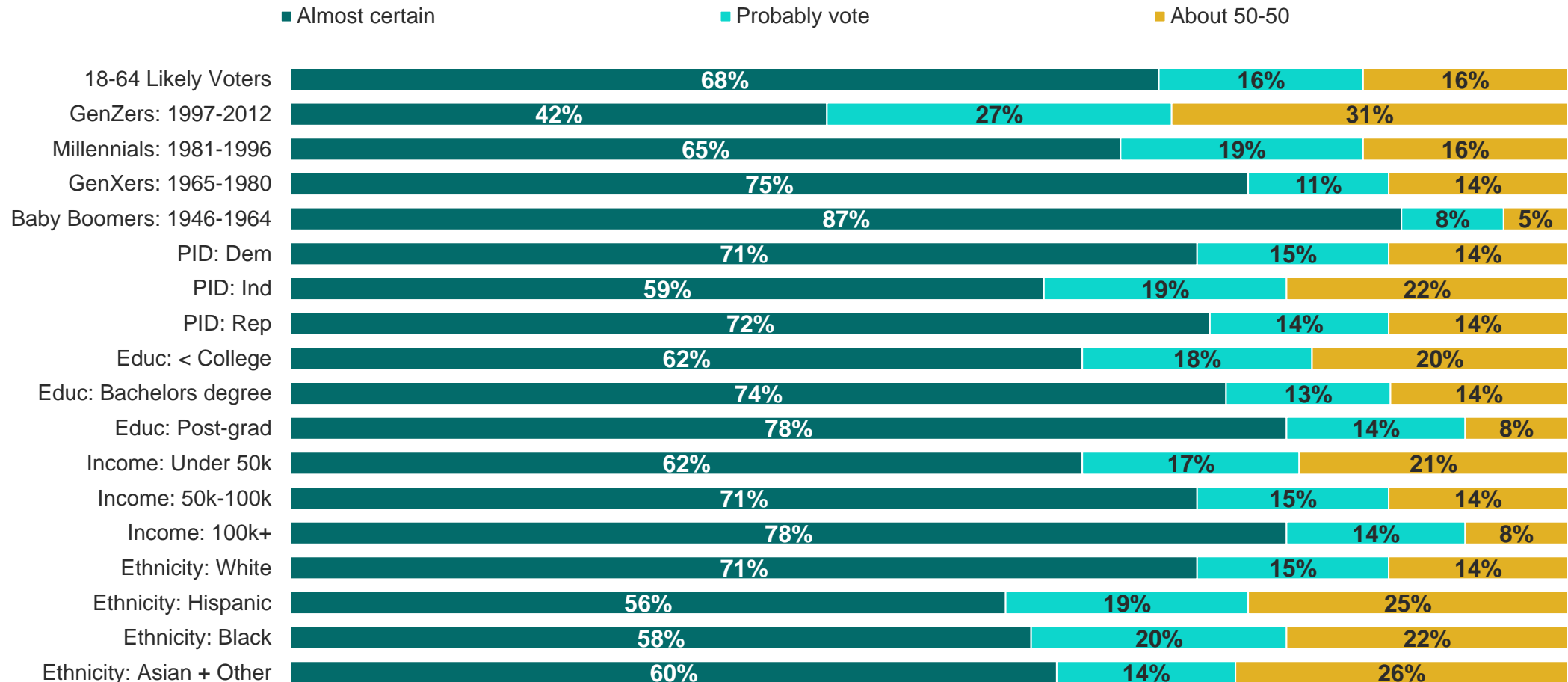
APPENDIX: MEDIA LANDSCAPE

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



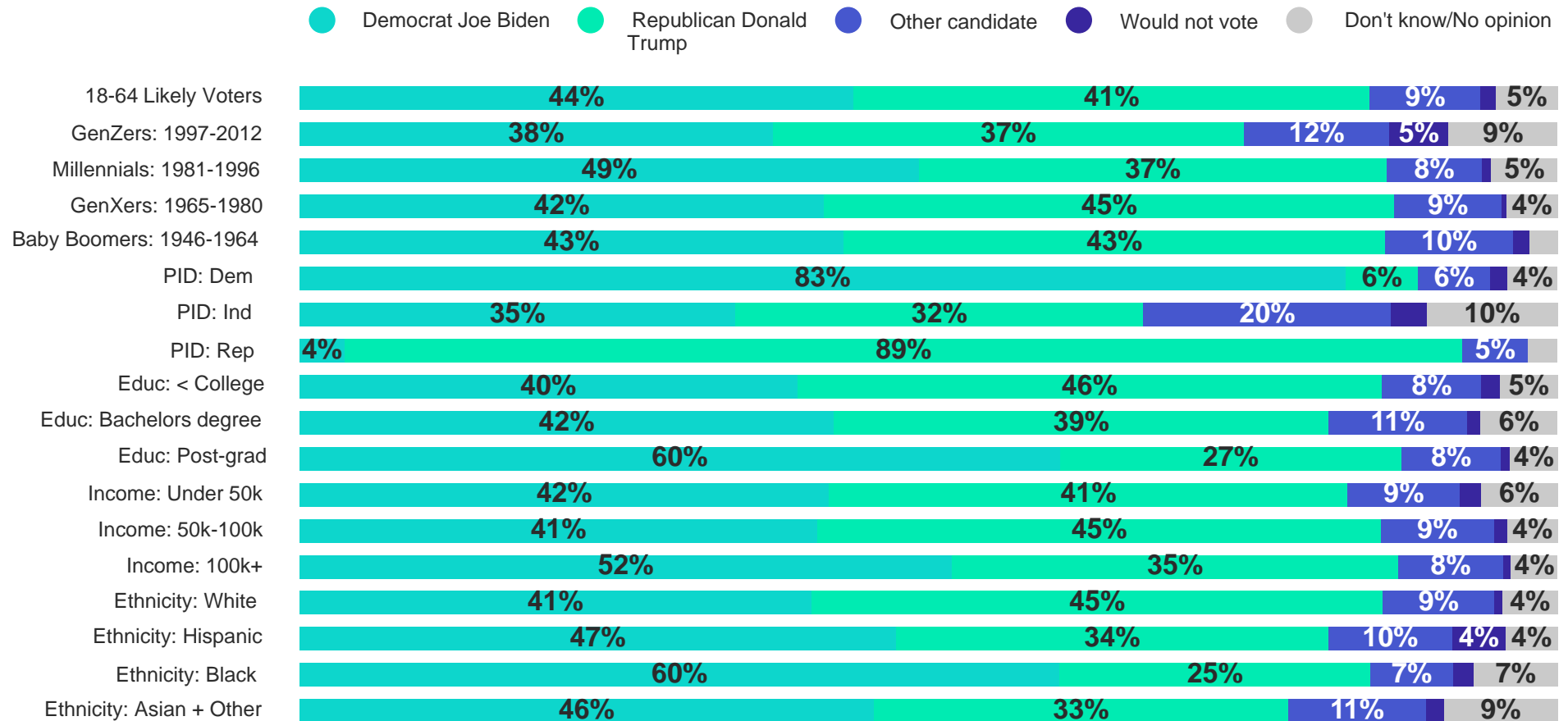
APPENDIX: VOTING BEHAVIORS

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?



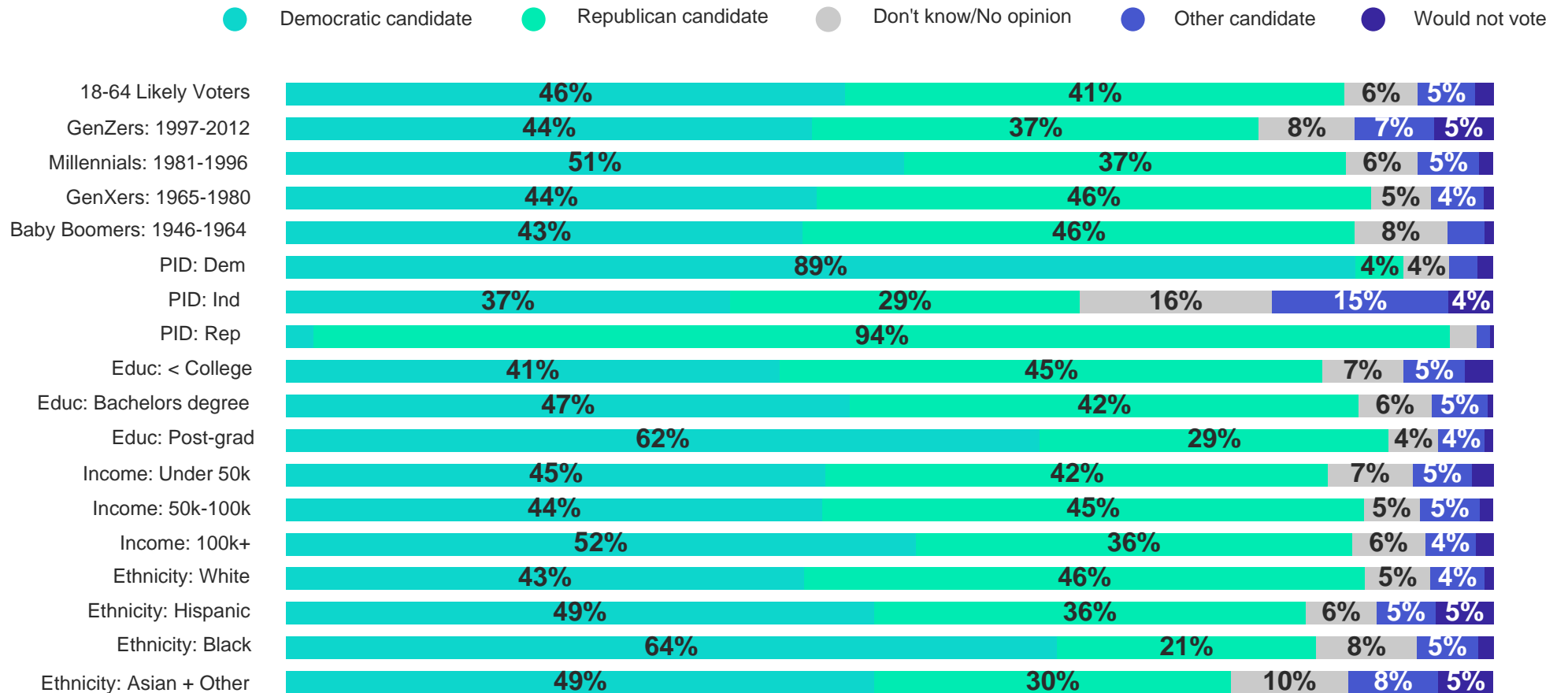
APPENDIX: VOTING BEHAVIORS

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?



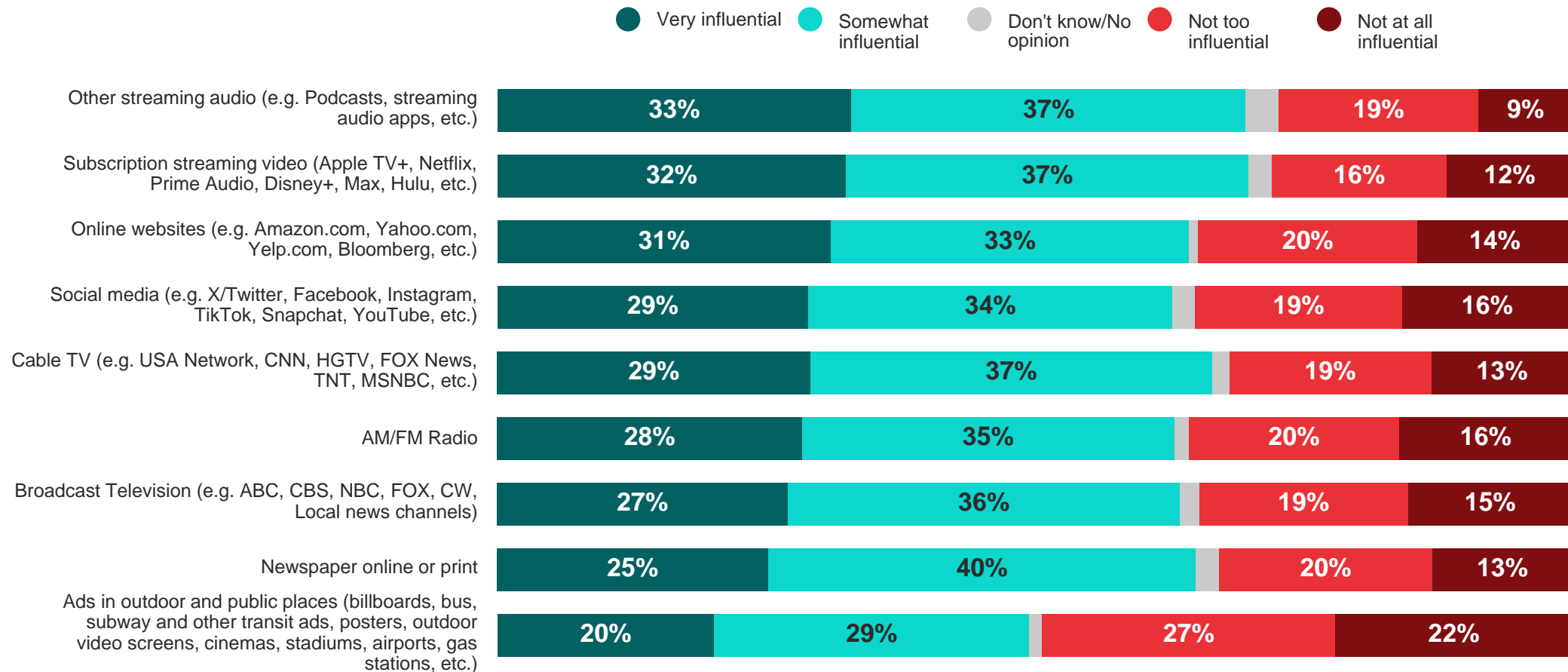
APPENDIX: VOTING BEHAVIORS

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?



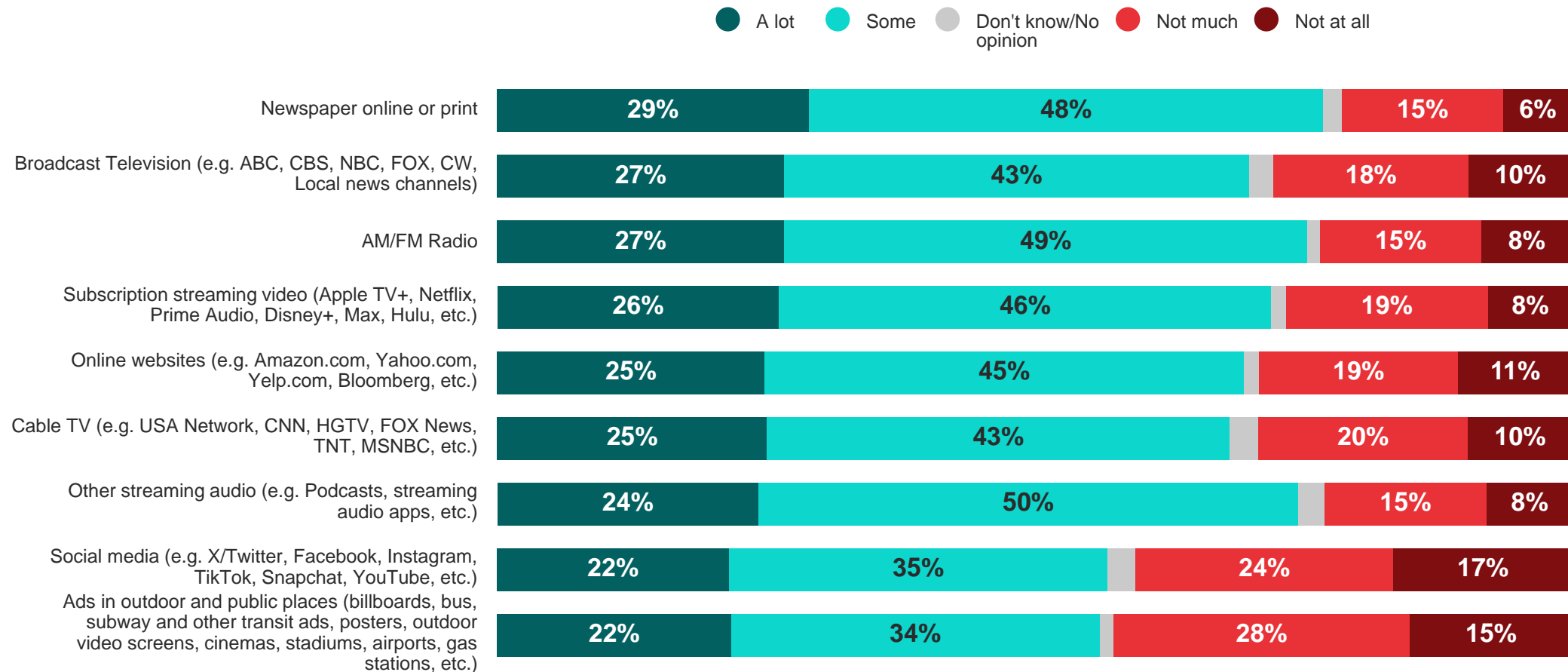
APPENDIX: INFLUENCE OF POLITICAL ADS

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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