



Out of Home Advertising Association of America

2024 OOH Facts & Figures

Ad Spend Performance

US OOH Media Landscape

- Local OOH Ad Sales = 65% of total
- National OOH Ad Sales = 35% of total
- OOH Share of Total Media Market = 2.4%
- DOOH Ad Sales = 34% of total
- PDOOH = 24% of DOOH
- OOH Ad Sales Annual Growth 2014 – 2023 = 3.6%
- Projected OOH Ad Sales Annual Growth 2025 – 2029 = 4.5%
- OOH Market Share of Top Three Media Companies = 57%



Source: MAGNA, OAAA, Rapport

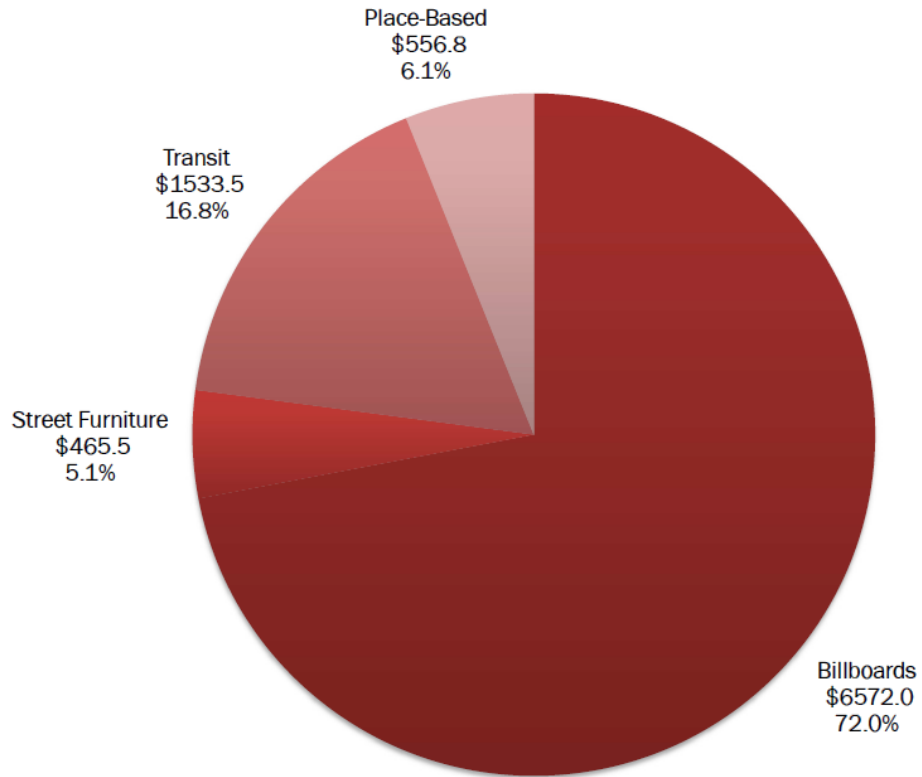
2024 OOH Advertising Displays Nationwide



Source: OAAA

2024 OOH Ad Spend Grew 4.5% to \$9.13 Billion

2024 YE
Total OOH Revenue \$9.13 Billion



2024 Category Performance vs. 2023

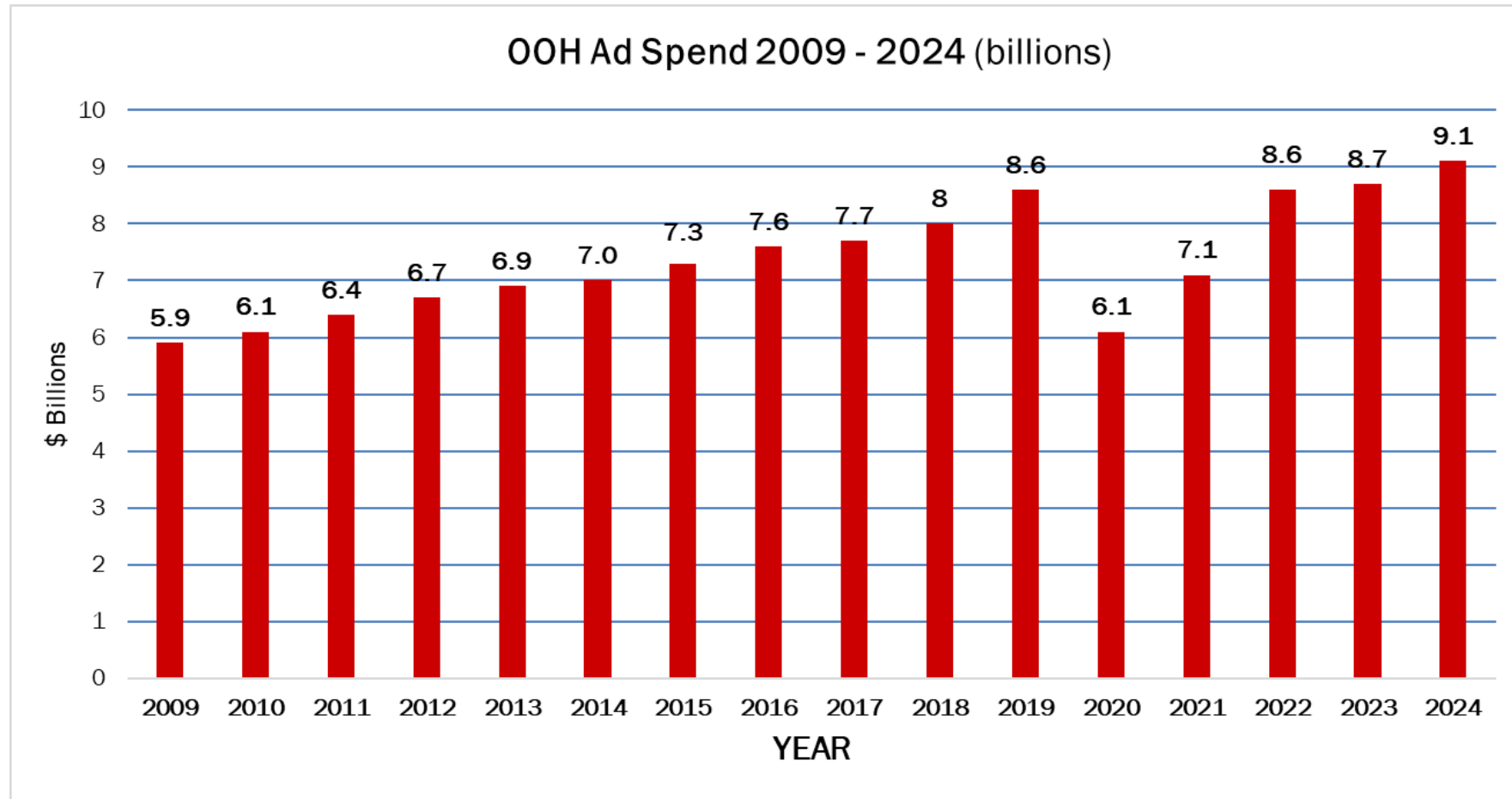
- Billboards +3.6
- Street Furniture +5.0%
- Transit +10.6%
- Place-Based -1.6%

+7.5%

DOOH Growth

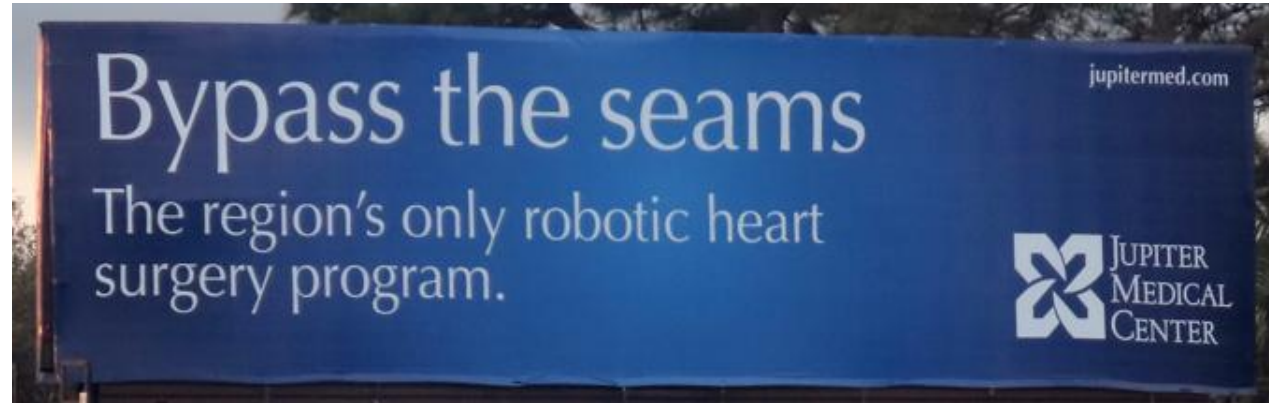
Digital OOH represents 34% of total OOH, format figures in millions.
Source: OAAA

2024 OOH Ad Spend Tops \$9 Billion



Source: OAAA

2024 OOH Ad Spend: Top 10 Product Industries



The top 10 product industries account for 80% of OOH spend

| Industry Categories | January - December 2024 (000) | Percent of Total Revenue | Rank | January - December 2023 (000) | Rank | Category Growth January - December '24 vs '23 (000) | Percentage Change January - December '24 vs '23 (%) |
|---------------------------------|-------------------------------|--------------------------|------|-------------------------------|------|---|---|
| LOCAL SERVICES & AMUSEMENTS | \$2,592,980.1 | 27.0% | 1 | \$2,360,520.9 | 1 | 232,459.3 | 9.8% |
| RETAIL | \$864,125.2 | 8.9% | 2 | \$774,032.3 | 2 | 90,093.0 | 11.6% |
| PUBLIC TRANS., HOTELS & RESORTS | \$651,102.0 | 7.5% | 3 | \$658,204.9 | 3 | -7,102.9 | -1.1% |
| GOVERNMENT, POLITICS & ORGS | \$630,741.6 | 6.9% | 4 | \$563,877.0 | 5 | 66,864.6 | 11.9% |
| MEDIA & ADVERTISING | \$601,843.6 | 6.5% | 5 | \$605,325.2 | 4 | -3,481.6 | -0.6% |
| RESTAURANTS | \$501,225.9 | 5.9% | 6 | \$514,935.3 | 6 | -13,709.3 | -2.7% |
| INSURANCE & REAL ESTATE | \$418,215.2 | 5.1% | 7 | \$413,074.6 | 8 | 5,140.5 | 1.2% |
| FINANCIAL | \$385,231.1 | 4.7% | 8 | \$446,948.0 | 7 | -61,717.0 | -13.8% |
| COMMUNICATIONS | \$327,764.7 | 3.7% | 9 | \$288,246.4 | 11 | 39,518.3 | 13.7% |
| AUTOMOTIVE DEALERS & SERVICES | \$321,819.6 | 3.3% | 10 | \$290,351.2 | 10 | 31,468.5 | 10.8% |
| Total Top Ten Categories | \$ 7,295,049.0 | 79.6% | | \$6,915,515.8 | | \$379,533.3 | |

Total 2024 January - December OOH Expenditures \$9,127,802,138
 Overall Percentage Change January - December '24 vs '23 4.5%

Source: OAAA, MediaRadar

2024 OOH Ad Spend: Top 25 Product Categories

1. Legal Services
2. Hospitals, Clinics & Medical Centers
3. Domestic Hotels & Resorts
4. Quick Serve Restaurants
5. Consumer Banking
6. Colleges & Universities
7. Local Government
8. Chain Food Stores & Supermarkets
9. Television & Cable TV
10. Live Theater, Opera, Music, Dance
11. Fuel Suppliers, Plumbing & HVAC Services
12. Architects, Contractors, Engineers
13. Religious, Charitable & Humanitarian Organizations
14. Computer Software (excl games, education)
15. Wireless Telecom Providers
16. Miscellaneous Organizations
17. Real Estate Agents, Agencies & Brokers
18. Medical & Dental Insurance
19. Local Amusements & Events
20. Apparel
21. Online & Mobile Travel Services
22. Motion Pictures
23. Domestic Tourism
24. Local Restaurants
25. Wireless Home/Business Phone Equipment & Systems

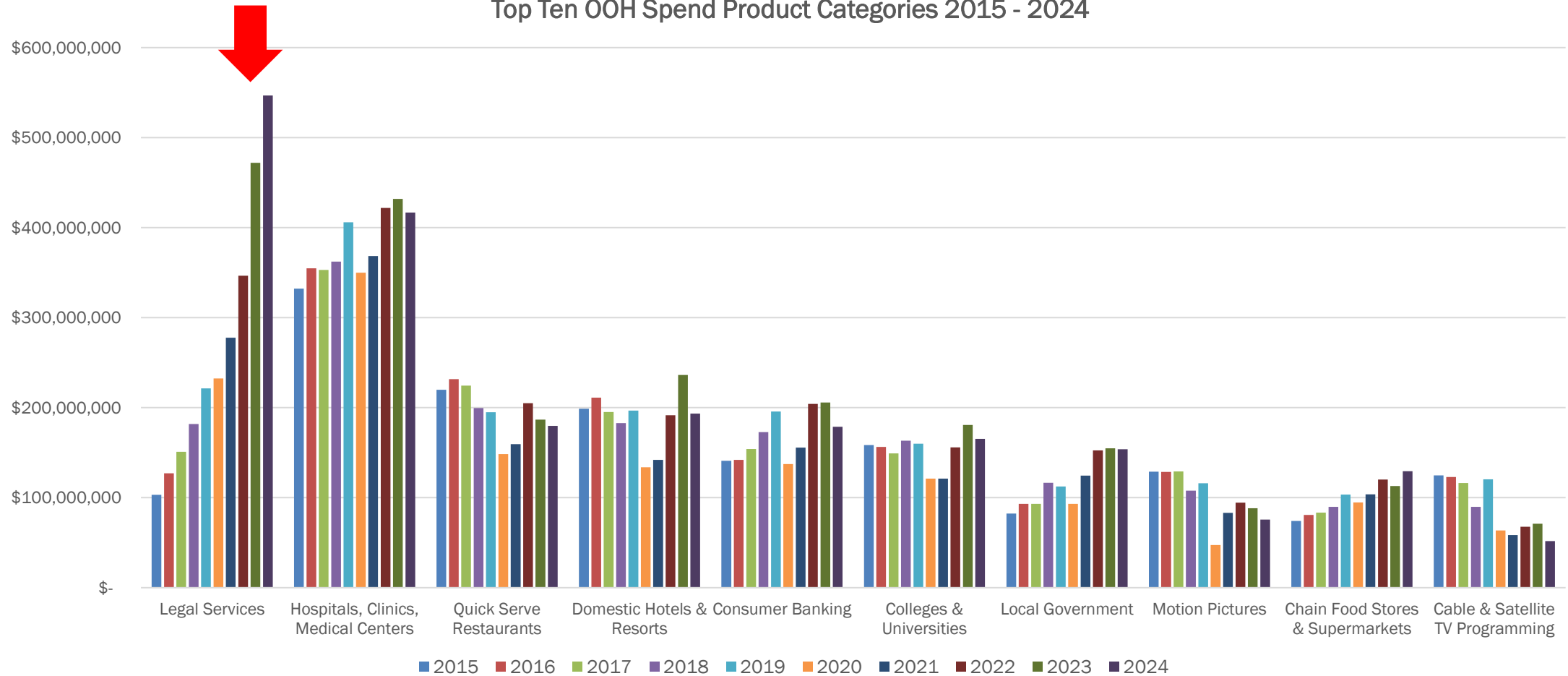
The top 25 product categories account for 53% of total OOH spend



Source: MediaRadar

OOH Ad Spend: Product Category Trends 2015 - 2024

Top Ten OOH Spend Product Categories 2015 - 2024



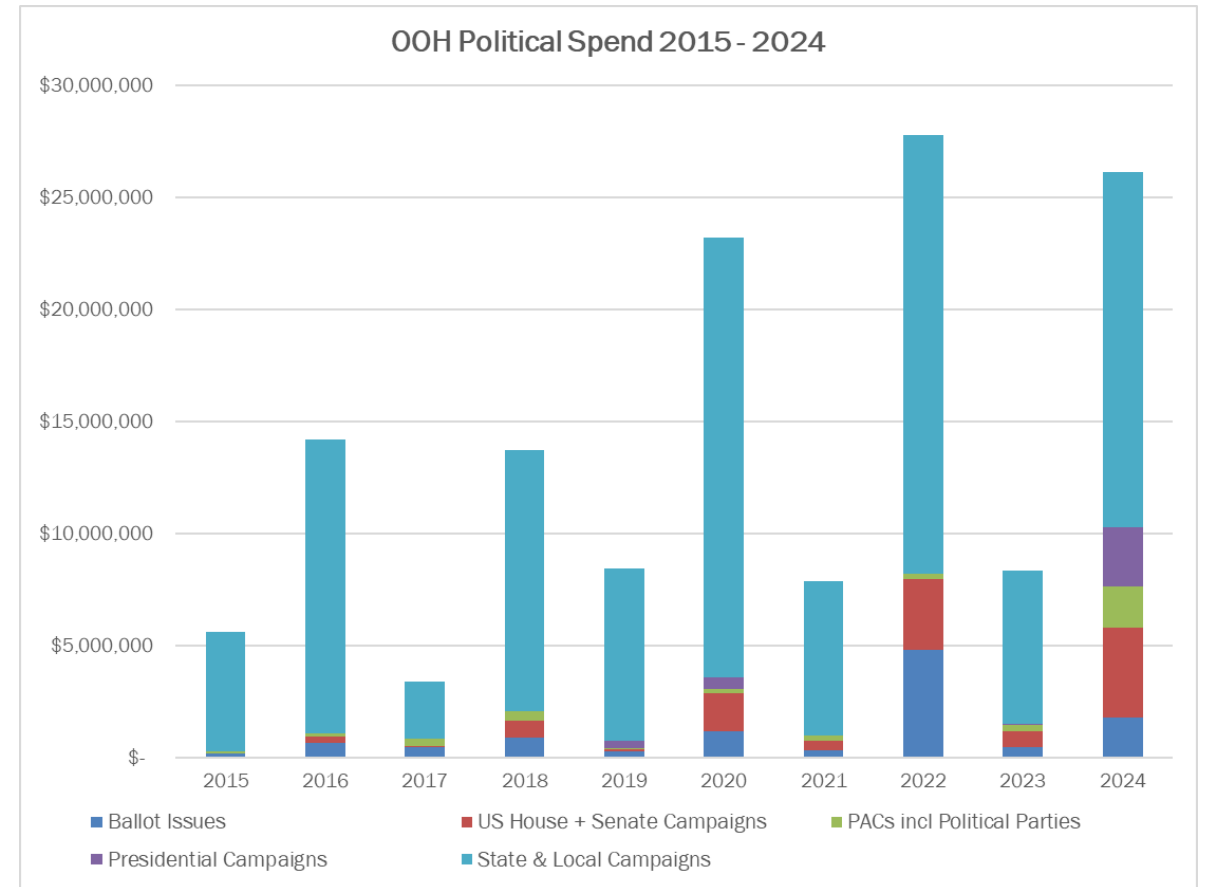
NOTE: OAAA estimates Vivvix under reports OOH spend by approximately 30%, so data in this chart is best used for longitudinal analysis.

Source: MediaRadar

OOH Political Ad Spend 2015 - 2024

Highest spend for Presidential Election Year

- Records for US House + Senate, and Presidential Campaigns, plus PACs
- Significant drop in Ballot Issue spend, State + Local campaign investment lower



Source: MediaRadar

2024 Top Ten OOH Advertisers and Parent Companies

Advertisers

- Apple
- McDonald's
- Amazon
- Coca-Cola
- Verizon
- Disney
- Morgan & Morgan Attorneys
- Hotels.com
- Google
- Samsung



[Access the full 2024 MegaBrands report here](#)

Parent Companies

- Walt Disney Company
- Comcast Corp.
- Expedia Inc.
- Apple Inc.
- McDonald's Corp.
- Amazon.com Inc.
- Paramount Global
- Coca-Cola Co.
- LVMH Moët Hennessy Louis Vuitton SA
- Verizon Communications Inc.

Source: MediaRadar

2024 Top 20 OOH Advertisers: \$ Increase over 2023 Spend

| ADVERTISER | 2024 OOH Ad Spend | 2024 OOH Spend Rank | 2023 OOH Ad Spend | 2024 OOH Spend Increase over 2023 |
|---------------------------|-------------------|---------------------|-------------------|-----------------------------------|
| Hotels.com | \$33,989,103 | 8 | \$6,953,306 | \$27,035,796 |
| Amazon | \$55,176,104 | 3 | \$40,181,695 | \$14,994,410 |
| Verizon | \$44,229,837 | 5 | \$32,366,001 | \$11,863,836 |
| Morgan & Morgan Attorneys | \$38,664,750 | 7 | \$28,590,882 | \$10,073,868 |
| VRBO | \$17,154,321 | 21 | \$7,301,686 | \$9,852,635 |
| Samsung | \$27,721,256 | 10 | \$17,884,655 | \$9,836,601 |
| Old Navy | \$9,766,203 | 63 | \$88,353 | \$9,677,850 |
| Honda | \$11,632,441 | 44 | \$2,090,804 | \$9,541,638 |
| Nike | \$10,259,373 | 57 | \$1,888,436 | \$8,370,937 |
| Stripe | \$8,239,519 | 81 | \$1 | \$8,239,518 |
| Meta | \$14,717,493 | 28 | \$6,730,529 | \$7,986,964 |
| Paramount | \$19,467,641 | 18 | \$12,380,654 | \$7,086,987 |
| Heineken | \$14,443,934 | 29 | \$7,750,785 | \$6,693,149 |
| Total Wine & More | \$10,895,296 | 50 | \$4,703,798 | \$6,191,498 |
| QuikTrip | \$10,202,000 | 58 | \$4,023,106 | \$6,178,894 |
| Carnival | \$9,192,838 | 68 | \$3,033,982 | \$6,158,856 |
| 7-Eleven | \$9,184,075 | 69 | \$3,486,634 | \$5,697,441 |
| Turo | \$7,967,994 | 83 | \$2,724,839 | \$5,243,155 |
| Molson Coors | \$7,402,432 | 96 | \$3,069,564 | \$4,332,868 |
| ABC | \$10,464,493 | 55 | \$6,254,167 | \$4,210,326 |



NOTE: OAAA estimates Vivix under reports OOH spend by approximately 30%.

Source: MediaRadar

2024 Top 20 OOH Advertisers: % Increase over 2023 Spend

| ADVERTISER | 2024 OOH Ad Spend | 2024 OOH Ad Spend Rank | 2024 OOH % Increase over 2023 |
|----------------------------|-------------------|------------------------|-------------------------------|
| Stripe | 8,239,519 | 81 | 823951800% |
| Old Navy | 9,766,203 | 63 | 10954% |
| Honda | 11,632,441 | 44 | 456% |
| Nike | 10,259,373 | 57 | 443% |
| Hotels.com | 33,989,103 | 8 | 389% |
| Carnival | 9,192,838 | 68 | 203% |
| Turo | 7,967,994 | 83 | 192% |
| 7-Eleven | 9,184,075 | 69 | 163% |
| QuikTrip | 10,202,000 | 58 | 154% |
| Molson Coors | 7,402,432 | 96 | 141% |
| VRBO | 17,154,321 | 21 | 135% |
| Total Wine & More | 10,895,296 | 50 | 132% |
| Meta | 14,717,493 | 28 | 119% |
| Heineken | 14,443,934 | 29 | 86% |
| Spectrum | 7,884,244 | 86 | 86% |
| Progressive | 8,414,509 | 79 | 75% |
| Sixt | 9,371,848 | 66 | 70% |
| ABC | 10,464,493 | 55 | 67% |
| Paramount | 19,467,641 | 18 | 57% |
| Universal Hotels & Resorts | 8,677,776 | 75 | 56% |



NOTE: OAAA estimates Vivix under reports OOH spend by approximately 30%.

Source: MediaRadar

2024 Top 30 Local OOH Ad Spend Markets

2024 OOH Ad Spend by DMA

| OOH Ad Spend Rank | DMA MARKET | 2024 OOH Ad Spend | 2024 % of Total US OOH |
|-------------------|---------------|-------------------|------------------------|
| 1 | NEW YORK | \$788,254,933 | 12.90% |
| 2 | LOS ANGELES | \$598,064,138 | 9.79% |
| 3 | CHICAGO | \$217,319,517 | 3.56% |
| 4 | MIAMI | \$213,201,333 | 3.49% |
| 5 | DALLAS | \$207,727,236 | 3.40% |
| 6 | ORLANDO | \$189,012,349 | 3.09% |
| 7 | SAN FRANCISCO | \$182,092,548 | 2.98% |
| 8 | ATLANTA | \$175,287,225 | 2.87% |
| 9 | PHILADELPHIA | \$167,390,606 | 2.74% |
| 10 | HOUSTON | \$162,188,436 | 2.65% |
| 11 | BOSTON | \$136,430,698 | 2.23% |
| 12 | LAS VEGAS | \$134,920,697 | 2.21% |
| 13 | PHOENIX | \$115,270,250 | 1.89% |
| 14 | TAMPA | \$112,966,945 | 1.85% |
| 15 | MINNEAPOLIS | \$86,239,891 | 1.41% |
| 16 | WASHINGTON,DC | \$81,216,459 | 1.33% |
| 17 | DETROIT | \$77,397,404 | 1.27% |
| 18 | SAN DIEGO | \$70,227,738 | 1.15% |
| 19 | SAN ANTONIO | \$63,861,601 | 1.05% |
| 20 | SACRAMENTO | \$62,205,810 | 1.02% |
| 21 | ALL OTHER | \$60,416,253 | 0.99% |
| 22 | HARRISBURG | \$55,958,873 | 0.92% |
| 23 | NASHVILLE | \$54,408,532 | 0.89% |
| 24 | MILWAUKEE | \$51,351,649 | 0.84% |
| 25 | PORTLAND,OR | \$48,365,801 | 0.79% |
| 26 | ST LOUIS | \$47,595,752 | 0.78% |
| 27 | HARTFORD | \$47,412,352 | 0.78% |
| 28 | DENVER | \$44,310,928 | 0.73% |
| 29 | SOUTH BEND | \$42,920,071 | 0.70% |
| 30 | CHARLOTTE | \$41,934,578 | 0.69% |



[Access the full report here](#)

NOTE: OAAA estimates Vivivx under reports OOH spend by approximately 30%.

Source: MediaRadar

2024 Top 30 Total Local Ad Spend by Market Share Analysis

| Total Local Ad Spend Rank | DMA MARKET | Total Local Ad Spend \$ | OOH Local Ad Spend \$ | OOH Ad Spend DMA Rank | OOH Share of DMA Local Ad Spend |
|---------------------------|----------------|-------------------------|-----------------------|-----------------------|---------------------------------|
| 1 | NEW YORK | \$3,143,522,384 | \$788,254,933 | 1 | 25.1% |
| 2 | LOS ANGELES | \$2,415,326,377 | \$598,064,138 | 2 | 24.8% |
| 3 | CHICAGO | \$1,353,077,702 | \$217,319,517 | 3 | 16.1% |
| 4 | HOUSTON | \$1,190,976,534 | \$162,188,436 | 10 | 13.6% |
| 5 | PHILADELPHIA | \$1,186,466,347 | \$167,390,606 | 9 | 14.1% |
| 6 | DALLAS | \$1,118,313,477 | \$207,727,236 | 5 | 18.6% |
| 7 | WASHINGTON,DC | \$1,027,053,837 | \$81,216,459 | 16 | 7.9% |
| 8 | SAN FRANCISCO | \$1,007,844,942 | \$182,092,548 | 7 | 18.1% |
| 9 | MIAMI | \$948,039,400 | \$213,201,333 | 4 | 22.5% |
| 10 | ATLANTA | \$935,012,922 | \$175,287,225 | 8 | 18.7% |
| 11 | BOSTON | \$919,937,485 | \$136,430,698 | 11 | 14.8% |
| 12 | PHOENIX | \$792,785,559 | \$115,270,250 | 13 | 14.5% |
| 13 | DETROIT | \$763,630,527 | \$77,397,404 | 17 | 10.1% |
| 14 | TAMPA | \$652,781,116 | \$112,966,945 | 14 | 17.3% |
| 15 | ORLANDO | \$644,686,464 | \$189,012,349 | 6 | 29.3% |
| 16 | DENVER | \$582,107,269 | \$44,310,928 | 27 | 7.6% |
| 17 | MINNEAPOLIS | \$525,337,661 | \$86,239,891 | 15 | 16.4% |
| 18 | LAS VEGAS | \$522,438,609 | \$134,920,697 | 12 | 25.8% |
| 19 | SEATTLE | \$514,460,121 | \$38,313,748 | 32 | 7.4% |
| 20 | CLEVELAND | \$487,661,438 | \$37,625,640 | 35 | 7.7% |
| 21 | SAN DIEGO | \$483,609,997 | \$70,227,738 | 18 | 14.5% |
| 22 | PITTSBURGH | \$458,035,002 | \$38,308,944 | 33 | 8.4% |
| 23 | ST LOUIS | \$419,154,119 | \$47,595,752 | 25 | 11.4% |
| 24 | SAN ANTONIO | \$393,651,724 | \$63,861,601 | 19 | 16.2% |
| 25 | INDIANAPOLIS | \$371,074,171 | \$32,893,198 | 38 | 8.9% |
| 26 | SALT LAKE CITY | \$356,892,301 | \$24,616,497 | 49 | 6.9% |
| 27 | PORTLAND,OR | \$356,616,625 | \$48,365,801 | 24 | 13.6% |
| 28 | SACRAMENTO | \$356,169,401 | \$62,205,810 | 20 | 17.5% |
| 29 | CHARLOTTE | \$351,851,508 | \$41,934,578 | 29 | 11.9% |
| 30 | MILWAUKEE | \$336,405,224 | \$51,351,649 | 23 | 15.3% |



[Access the full report here](#)

NOTE: OAAA estimates Vivix under reports OOH spend by approximately 30%.

Source: MediaRadar

2024 Top 30 Markets Local Ad Spend Ranked by OOH Share

| Total Local Ad Spend Rank | DMA MARKET | Total Local Ad Spend \$ | OOH Local Ad Spend \$ | OOH Ad Spend DMA Rank | OOH Share of DMA Local Ad Spend |
|---------------------------|--------------|-------------------------|-----------------------|-----------------------|---------------------------------|
| 152 | RAPID CITY | \$18,508,926 | \$11,982,692 | 94 | 64.7% |
| 195 | VICTORIA | \$5,960,106 | \$3,580,511 | 143 | 60.1% |
| 173 | CASPER | \$13,615,144 | \$7,466,354 | 122 | 54.8% |
| 141 | CHICO | \$24,865,116 | \$13,130,750 | 85 | 52.8% |
| 66 | SOUTH BEND | \$98,196,853 | \$42,920,071 | 28 | 43.7% |
| 150 | PANAMA CITY | \$19,543,252 | \$7,940,362 | 117 | 40.6% |
| 157 | LAKE CHARLES | \$17,585,515 | \$6,947,029 | 124 | 39.5% |
| 124 | BILOXI | \$36,821,817 | \$14,506,346 | 77 | 39.4% |
| 154 | JACKSON, TN | \$18,067,083 | \$6,786,355 | 126 | 37.6% |
| 130 | ALBANY, GA | \$30,732,425 | \$11,511,260 | 95 | 37.5% |
| 161 | LAREDO | \$16,828,461 | \$6,113,700 | 131 | 36.3% |
| 168 | YUMA | \$13,946,660 | \$5,015,047 | 133 | 36.0% |
| 140 | DULUTH | \$24,954,022 | \$8,912,936 | 109 | 35.7% |
| 63 | MOBILE | \$104,741,884 | \$36,826,562 | 36 | 35.2% |
| 159 | ODESSA | \$17,400,051 | \$6,089,603 | 132 | 35.0% |
| 79 | FT WAYNE | \$70,865,881 | \$24,674,431 | 47 | 34.8% |
| 128 | SALISBURY | \$33,084,721 | \$11,441,572 | 96 | 34.6% |
| 171 | ALEXANDRIA | \$13,675,890 | \$4,628,774 | 138 | 33.8% |
| 114 | BOISE | \$42,977,890 | \$14,373,455 | 79 | 33.4% |
| 117 | PALM SPRINGS | \$42,041,204 | \$13,961,268 | 83 | 33.2% |
| 98 | HUNTSVILLE | \$52,586,680 | \$17,185,990 | 62 | 32.7% |
| 147 | LUBBOCK | \$21,617,554 | \$7,022,511 | 123 | 32.5% |
| 165 | CLARKSBURG | \$15,124,686 | \$4,816,652 | 135 | 31.8% |
| 164 | TOPEKA | \$15,130,418 | \$4,707,276 | 136 | 31.1% |
| 126 | BILLINGS | \$35,238,495 | \$10,710,624 | 101 | 30.4% |
| 135 | ERIE | \$25,672,930 | \$7,779,778 | 120 | 30.3% |
| 107 | MYRTLE BEACH | \$48,298,345 | \$14,587,950 | 75 | 30.2% |
| 184 | IDAHO FALLS | \$8,020,553 | \$2,373,942 | 148 | 29.6% |
| 15 | ORLANDO | \$644,686,464 | \$189,012,349 | 6 | 29.3% |
| 112 | MACON | \$44,615,690 | \$12,800,063 | 88 | 28.7% |



[Access the full report here](#)

NOTE: OAAA estimates Vivvix under reports OOH spend by approximately 30%.

Source: MediaRadar

2024 Total Local Ad Spend by Market by Media Channel

| Total Local Ad Spend Rank | DMA MARKET | Total Local Ad Spend | OOH Local Ad Spend | OOH Ad Spend Market Rank | % of Market Spend | Spot TV Local Ad Spend | % of Market Spend | Radio Local Ad Spend | % of Market Spend | Print Local Ad Spend (newspaper, magazine) | % of Market Spend | Mobile Web Local Ad Spend | % of Market Spend | Mobile Web Video Local Ad Spend | % of Market Spend | National Spot Radio Local Ad Spend | % of Market Spend | Internet Display Local Ad Spend | % of Market Spend | Online Video Local Ad Spend | % of Market Spend |
|---------------------------|---------------|----------------------|--------------------|--------------------------|-------------------|------------------------|-------------------|----------------------|-------------------|--|-------------------|---------------------------|-------------------|---------------------------------|-------------------|------------------------------------|-------------------|---------------------------------|-------------------|-----------------------------|-------------------|
| 1 | NEW YORK | 3,143,522,384 | 788,254,933 | 1 | 25.1 | 874,795,014 | 27.8 | 459,974,860 | 14.6 | 490,156,085 | 15.6% | 187,516,300 | 6.0 | 98,700,532 | 3.1 | 98,883,591 | 3.1 | 67,342,696 | 2.1 | 77,898,373 | 2.5 |
| 2 | LOS ANGELES | 2,415,326,377 | 598,064,138 | 2 | 24.8 | 872,884,382 | 36.1 | 512,633,635 | 21.2 | 165,109,830 | 6.8% | 61,716,139 | 2.6 | 57,715,113 | 2.4 | 99,693,832 | 4.1 | 29,736,095 | 1.2 | 17,773,214 | 0.7 |
| 3 | CHICAGO | 1,353,077,702 | 217,319,517 | 3 | 16.1 | 446,128,401 | 33.0 | 251,506,379 | 18.6 | 205,823,964 | 15.2% | 62,999,492 | 4.7 | 63,927,302 | 4.7 | 65,022,473 | 4.8 | 17,631,542 | 1.3 | 22,718,633 | 1.7 |
| 4 | HOUSTON | 1,190,976,534 | 162,188,436 | 10 | 13.6 | 382,736,926 | 32.1 | 239,776,719 | 20.1 | 63,069,556 | 5.3% | 123,848,284 | 10.4 | 66,012,587 | 5.5 | 69,749,325 | 5.9 | 61,377,000 | 5.2 | 22,217,702 | 1.9 |
| 5 | PHILADELPHIA | 1,186,466,347 | 167,390,606 | 9 | 14.1 | 567,259,810 | 47.8 | 210,066,980 | 17.7 | 55,868,647 | 4.7% | 35,681,821 | 3.0 | 35,517,612 | 3.0 | 68,669,195 | 5.8 | 21,372,422 | 1.8 | 24,639,254 | 2.1 |
| 6 | DALLAS | 1,118,313,477 | 207,727,236 | 5 | 18.6 | 438,357,297 | 39.2 | 248,507,674 | 22.2 | 48,329,098 | 4.3% | 54,867,789 | 4.9 | 21,152,612 | 1.9 | 63,294,395 | 5.7 | 27,567,192 | 2.5 | 8,510,185 | 0.8 |
| 7 | WASHINGTON,DC | 1,027,053,837 | 81,216,459 | 16 | 7.9 | 434,710,978 | 42.3 | 149,813,580 | 14.6 | 163,540,547 | 15.9% | 32,132,956 | 3.1 | 41,256,307 | 4.0 | 43,699,508 | 4.3 | 30,715,502 | 3.0 | 49,968,000 | 4.9 |
| 8 | SAN FRANCISCO | 1,007,844,942 | 182,092,548 | 7 | 18.1 | 375,715,176 | 37.3 | 209,233,013 | 20.8 | 45,865,741 | 4.6% | 59,056,579 | 5.9 | 39,723,179 | 3.9 | 44,169,254 | 4.4 | 18,457,786 | 1.8 | 33,531,667 | 3.3 |
| 9 | MIAMI | 948,039,400 | 213,201,333 | 4 | 22.5 | 411,433,963 | 43.4 | 137,176,145 | 14.5 | 65,810,447 | 6.9% | 21,402,502 | 2.3 | 27,246,532 | 2.9 | 43,931,354 | 4.6 | 18,702,126 | 2.0 | 9,134,998 | 1.0 |
| 10 | ATLANTA | 935,012,922 | 175,287,225 | 8 | 18.7 | 372,683,611 | 39.9 | 170,634,022 | 18.2 | 30,735,540 | 3.3% | 37,978,143 | 4.1 | 72,860,478 | 7.8 | 49,498,286 | 5.3 | 10,327,590 | 1.1 | 15,008,026 | 1.6 |
| 11 | BOSTON | 919,937,485 | 136,430,698 | 11 | 14.8 | 360,768,775 | 39.2 | 160,799,644 | 17.5 | 46,118,178 | 5.0% | 68,826,018 | 7.5 | 42,715,906 | 4.6 | 39,393,481 | 4.3 | 33,147,066 | 3.6 | 31,737,720 | 3.4 |
| 12 | PHOENIX | 792,785,559 | 115,270,250 | 13 | 14.5 | 335,646,057 | 42.3 | 131,297,171 | 16.6 | 48,428,672 | 6.1% | 43,164,380 | 5.4 | 45,948,677 | 5.8 | 46,728,994 | 5.9 | 14,165,670 | 1.8 | 12,135,689 | 1.5 |
| 13 | DETROIT | 763,630,527 | 77,397,404 | 17 | 10.1 | 325,721,841 | 42.7 | 152,194,205 | 19.9 | 25,962,318 | 3.4% | 61,504,482 | 8.1 | 26,585,539 | 3.5 | 45,635,854 | 6.0 | 18,878,771 | 2.5 | 29,750,113 | 3.9 |
| 14 | TAMPA | 652,781,116 | 112,966,945 | 14 | 17.3 | 277,206,845 | 42.5 | 79,443,403 | 12.2 | 56,813,775 | 8.7% | 24,050,976 | 3.7 | 46,091,705 | 7.1 | 30,499,965 | 4.7 | 15,673,286 | 2.4 | 10,034,217 | 1.5 |
| 15 | ORLANDO | 644,686,464 | 189,012,349 | 6 | 29.3 | 268,021,236 | 41.6 | 88,207,890 | 13.7 | 10,562,158 | 1.6% | 24,536,585 | 3.8 | 19,330,057 | 3.0 | 28,588,833 | 4.4 | 8,493,860 | 1.3 | 7,933,496 | 1.2 |
| 16 | DENVER | 582,107,269 | 44,310,928 | 27 | 7.6 | 251,943,883 | 43.3 | 103,385,417 | 17.8 | 19,267,197 | 3.3% | 29,553,809 | 5.1 | 76,129,703 | 13.1 | 29,788,924 | 5.1 | 9,328,598 | 1.6 | 18,398,811 | 3.2 |
| 17 | MINNEAPOLIS | 525,337,661 | 86,239,891 | 15 | 16.4 | 150,306,084 | 28.6 | 89,841,766 | 17.1 | 68,586,614 | 13.1% | 30,304,630 | 5.8 | 50,278,526 | 9.6 | 21,276,987 | 4.1 | 15,085,339 | 2.9 | 13,417,823 | 2.6 |
| 18 | LAS VEGAS | 522,438,609 | 134,920,697 | 12 | 25.8 | 207,179,530 | 39.7 | 53,141,988 | 10.2 | 44,725,050 | 8.6% | 23,852,522 | 4.6 | 16,019,489 | 3.1 | 16,815,595 | 3.2 | 20,361,727 | 3.9 | 5,422,011 | 1.0 |
| 19 | SEATTLE | 514,460,121 | 38,313,748 | 32 | 7.4 | 211,807,227 | 41.2 | 112,264,277 | 21.8 | 33,955,559 | 6.6% | 31,346,868 | 6.1 | 28,255,061 | 5.5 | 21,928,682 | 4.3 | 23,980,784 | 4.7 | 12,607,915 | 2.5 |
| 20 | CLEVELAND | 487,661,438 | 37,625,640 | 35 | 7.7 | 214,973,655 | 44.1 | 78,020,145 | 16.0 | 48,062,164 | 9.9% | 29,350,900 | 6.0 | 34,690,786 | 7.1 | 22,225,576 | 4.6 | 14,714,924 | 3.0 | 7,997,649 | 1.6 |

[Access the full report here](#)

NOTE: OAAA estimates Vivvix under reports OOH spend by approximately 30%.

Source: MediaRadar

2024 Product Industries Ad Spend by Media Channel

| RANK | PRODUCT INDUSTRY | Total Category Ad Spend | OOH Ad Spend | OOH % of Spend | Total Digital Desktop/Mobile Spend (Display, Video, Search, App) | Digital Media % of Spend | Internet Search Spend | Mobile Web Video Spend | Internet Display Spend | Mobile Web Spend | Mobile App Spend | Online Video Spend | Total TV Spend (Network, Spot, Cable, Spanish, Syndication) | Total TV % of Spend |
|------|---|-------------------------|---------------|----------------|--|--------------------------|-----------------------|------------------------|------------------------|------------------|------------------|--------------------|---|---------------------|
| | GRAND TOTAL | 202,854,057,249 | 6,437,299,049 | 3.2% | 117,569,962,267 | 58.0% | 63,080,529,735 | 15,375,826,360 | 12,153,923,335 | 11,115,453,020 | 9,404,180,797 | 6,440,049,021 | 64,030,132,535 | 31.6% |
| 1 | Retail | 28,753,089,392 | 609,439,888 | 2.1% | 22,774,095,364 | 79.2% | 16,284,960,361 | 1,496,746,904 | 1,737,617,419 | 1,517,160,981 | 1,097,131,025 | 640,478,674 | 3,801,657,896 | 13.2% |
| 2 | Local Services & Amusements | 18,714,802,522 | 1,829,899,516 | 9.8% | 9,093,597,310 | 48.6% | 4,649,876,388 | 1,123,214,118 | 875,341,404 | 927,836,129 | 1,003,550,536 | 513,778,735 | 5,227,838,167 | 27.9% |
| 3 | Media & Advertising | 13,970,430,293 | 424,444,701 | 3.0% | 9,751,553,227 | 69.8% | 5,009,643,832 | 1,393,213,973 | 1,025,760,492 | 983,952,925 | 890,541,699 | 448,440,306 | 2,961,742,573 | 21.2% |
| 4 | Insurance & Real Estate | 13,677,048,942 | 293,910,752 | 2.1% | 8,349,240,407 | 61.0% | 6,196,405,103 | 559,882,052 | 413,714,299 | 316,409,198 | 460,117,841 | 402,711,915 | 4,242,704,794 | 31.0% |
| 5 | Financial | 12,188,291,093 | 271,680,704 | 2.2% | 8,039,799,854 | 66.0% | 4,844,333,884 | 819,575,706 | 915,036,225 | 506,285,653 | 508,113,292 | 446,455,094 | 2,898,141,192 | 23.8% |
| 6 | Government, Politics & Organizations | 10,698,831,606 | 444,812,469 | 4.2% | 2,917,918,841 | 27.3% | 720,325,296 | 663,959,177 | 437,114,445 | 397,003,457 | 460,474,691 | 239,041,774 | 6,482,991,532 | 60.6% |
| 7 | Medicines & Proprietary Remedies | 10,692,463,092 | 12,478,095 | 0.1% | 2,587,725,959 | 24.2% | 627,290,355 | 700,501,462 | 346,622,497 | 407,926,121 | 224,964,638 | 280,420,885 | 7,704,022,051 | 72.1% |
| 8 | Public Transportation, Hotels & Resorts | 9,136,907,390 | 459,196,009 | 5.0% | 6,182,475,768 | 67.7% | 4,102,009,154 | 552,635,635 | 515,996,190 | 404,342,045 | 328,375,282 | 279,117,461 | 1,601,522,455 | 17.5% |
| 9 | Automotive, Automotive Access & Equip | 8,283,607,396 | 106,537,180 | 1.3% | 3,546,029,984 | 42.8% | 672,745,306 | 677,329,612 | 701,966,830 | 611,064,160 | 498,712,514 | 384,211,561 | 4,394,265,832 | 53.0% |
| 10 | Communications | 8,055,603,960 | 231,153,027 | 2.9% | 3,694,084,184 | 45.9% | 1,600,489,304 | 598,087,836 | 576,830,947 | 335,489,927 | 332,315,157 | 250,871,014 | 3,469,730,973 | 43.1% |

[Access the full report here](#)

NOTE: OAAA estimates Vivvix under reports OOH spend by approximately 30%.

Source: MediaRadar

2024 Total Ad Spend by Product Industry by Month

| Product Industry | Total Ad Spend | January 2024 Ad Spend | Monthly % of Annual Product Total | February 2024 Ad Spend | Monthly % of Annual Product Total | March 2024 Ad Spend | Monthly % of Annual Product Total | April 2024 Ad Spend | Monthly % of Annual Product Total | May 2024 Ad Spend | Monthly % of Annual Product Total | June 2024 Ad Spend | Monthly % of Annual Product Total |
|---|-----------------|-----------------------|-----------------------------------|------------------------|-----------------------------------|---------------------|-----------------------------------|---------------------|-----------------------------------|-------------------|-----------------------------------|--------------------|-----------------------------------|
| Grand Total | 202,854,057,249 | 16,855,506,402 | 8.3 | 15,724,905,657 | 7.8 | 16,098,375,829 | 7.9 | 15,720,650,473 | 7.7 | 16,204,349,754 | 8.0 | 14,844,815,220 | 7.3 |
| Retail | 28,753,089,392 | 2,702,412,590 | 9.4 | 2,457,407,843 | 8.5 | 2,348,152,027 | 8.2 | 2,388,047,073 | 8.3 | 2,516,326,940 | 8.8 | 2,205,901,315 | 7.7 |
| Local Services & Amusements | 18,714,802,522 | 1,593,189,905 | 8.5 | 1,409,310,501 | 7.5 | 1,427,677,814 | 7.6 | 1,477,635,605 | 7.9 | 1,502,683,803 | 8.0 | 1,410,599,414 | 7.5 |
| Media & Advertising | 13,970,430,293 | 1,080,509,736 | 7.7 | 1,121,321,057 | 8.0 | 1,087,729,627 | 7.8 | 1,020,199,331 | 7.3 | 1,123,035,982 | 8.0 | 1,058,218,927 | 7.6 |
| Insurance & Real Estate | 13,677,048,942 | 969,698,735 | 7.1 | 928,525,851 | 6.8 | 1,098,618,047 | 8.0 | 969,841,716 | 7.1 | 965,097,244 | 7.1 | 881,746,357 | 6.4 |
| Financial | 12,188,291,093 | 876,114,591 | 7.2 | 838,855,772 | 6.9 | 943,850,924 | 7.7 | 908,828,855 | 7.5 | 881,330,634 | 7.2 | 815,128,609 | 6.7 |
| Government, Politics & Organizations | 10,698,831,606 | 496,556,787 | 4.6 | 605,824,157 | 5.7 | 594,649,214 | 5.6 | 570,971,903 | 5.3 | 631,704,945 | 5.9 | 524,378,759 | 4.9 |
| Medicines & Proprietary Remedies | 10,692,463,092 | 1,134,372,516 | 10.6 | 892,559,158 | 8.3 | 989,205,239 | 9.3 | 887,716,216 | 8.3 | 900,896,281 | 8.4 | 820,325,849 | 7.7 |
| Public Transportation, Hotels & Resorts | 9,136,907,390 | 616,043,583 | 6.7 | 622,571,121 | 6.8 | 691,851,121 | 7.6 | 682,063,104 | 7.5 | 705,987,196 | 7.7 | 674,828,936 | 7.4 |
| Automotive, Automotive Access & Equip | 8,283,607,396 | 714,325,986 | 8.6 | 617,271,822 | 7.5 | 696,566,531 | 8.4 | 643,354,661 | 7.8 | 621,151,450 | 7.5 | 646,874,488 | 7.8 |
| Communications | 8,055,603,960 | 704,677,564 | 8.7 | 646,983,802 | 8.0 | 642,919,838 | 8.0 | 548,263,185 | 6.8 | 585,844,242 | 7.3 | 568,326,134 | 7.1 |

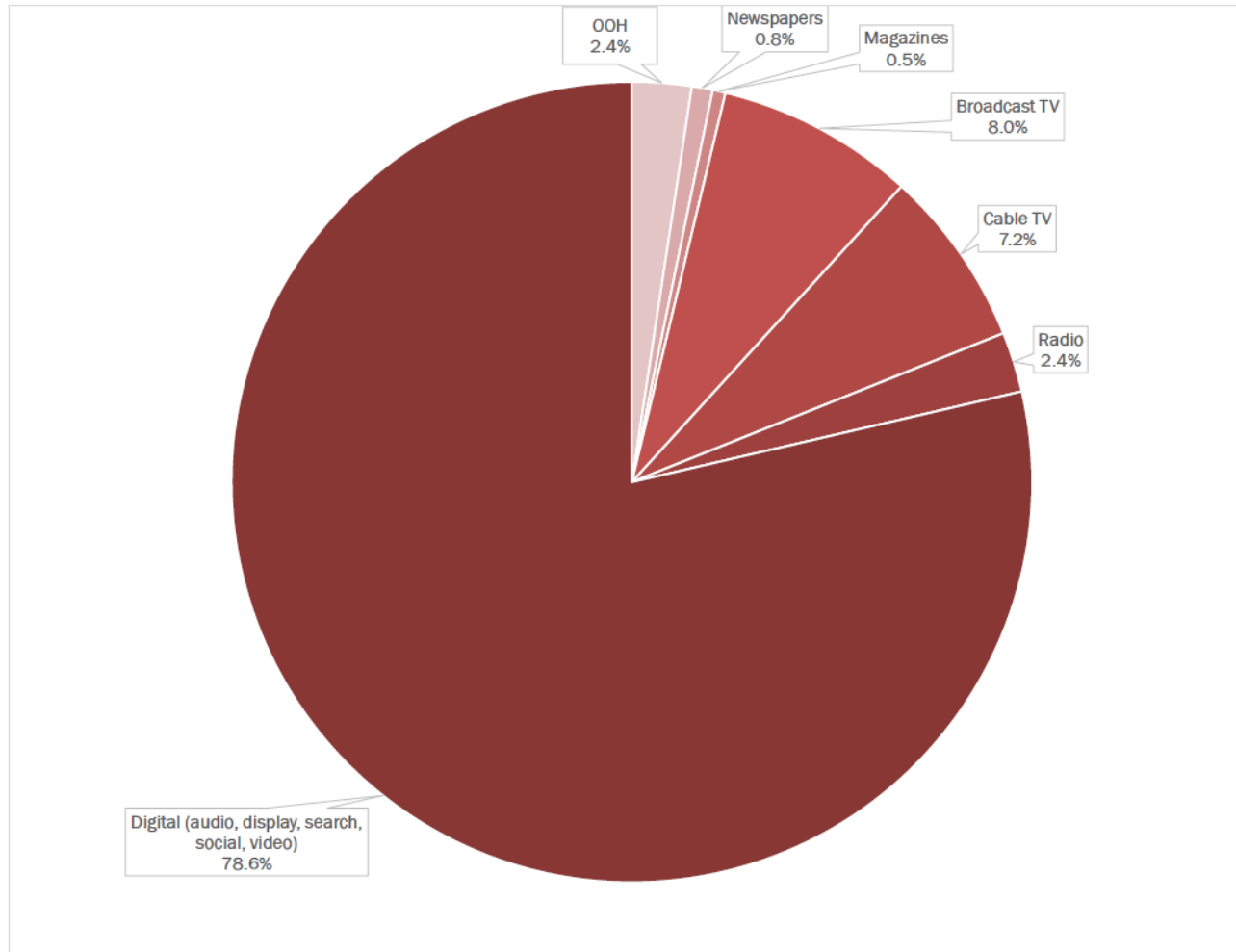
[Access the full report here](#)

NOTE: OAAA estimates Vivvix under reports OOH spend by approximately 30%.

Source: MediaRadar

2024 Total US Core Media Share Analysis: \$379 Billion Market

2024 OOH Share of Total US Core Media Spend



In 2024, OOH growth outperformed digital display, magazine, newspaper, radio and cable TV and accounted for 2.4% of total US media spend

[Access the full report here](#)

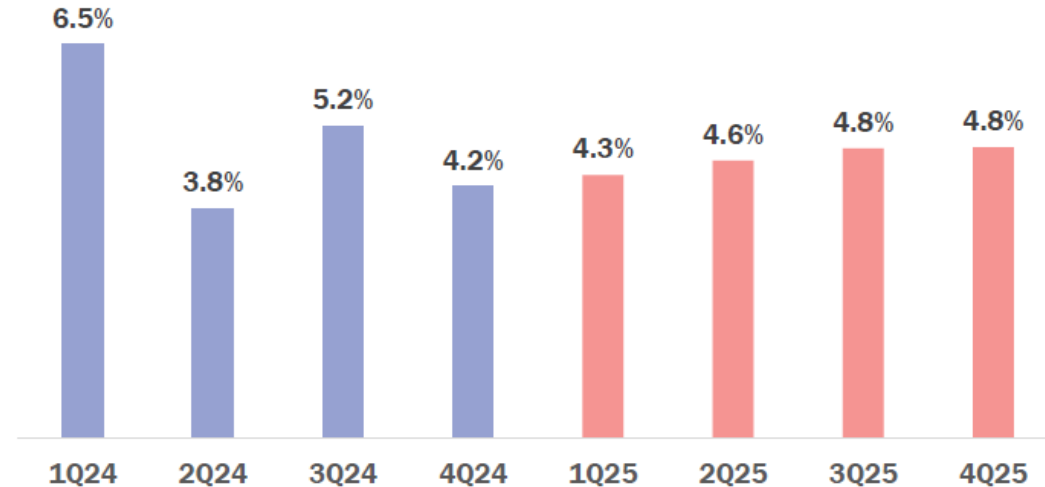
Source: MAGNA, OAAA

MAGNA: OOH Quarterly Growth 2024 - 2025

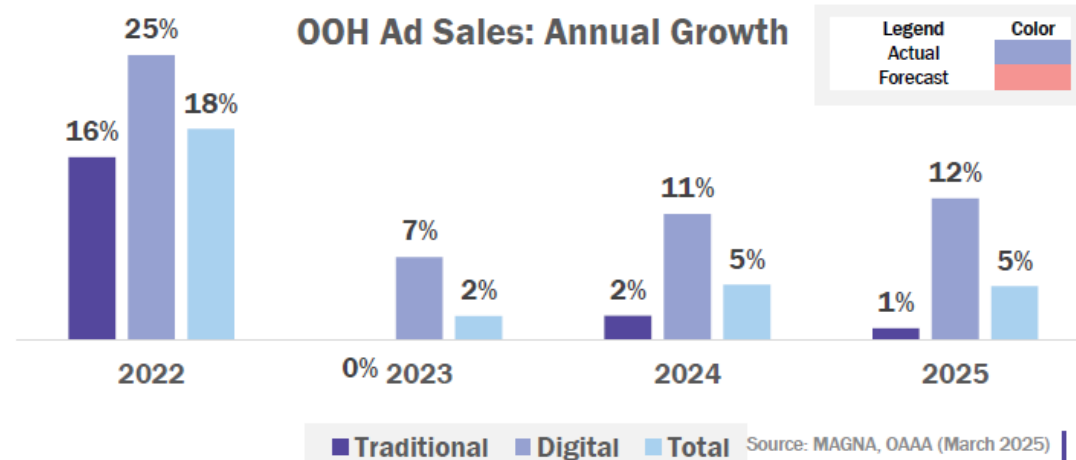
OOH sales rose +4.2% in 4Q24, capping off a strong year.

- Out of home sales (which don't include cinema) slowed in 2023 after very strong growth in 2021 and 2022, but came back to life in 2024 with +6.5% growth in 1Q and +5.2% in 3Q.
- Transit (+6%) and Street Furniture (+9%) were the best performing segments in both 3Q24 and 4Q24, but Billboards (the largest segment by far) still grew by +4% in both quarters.

OOH Ad Sales: Quarterly Growth



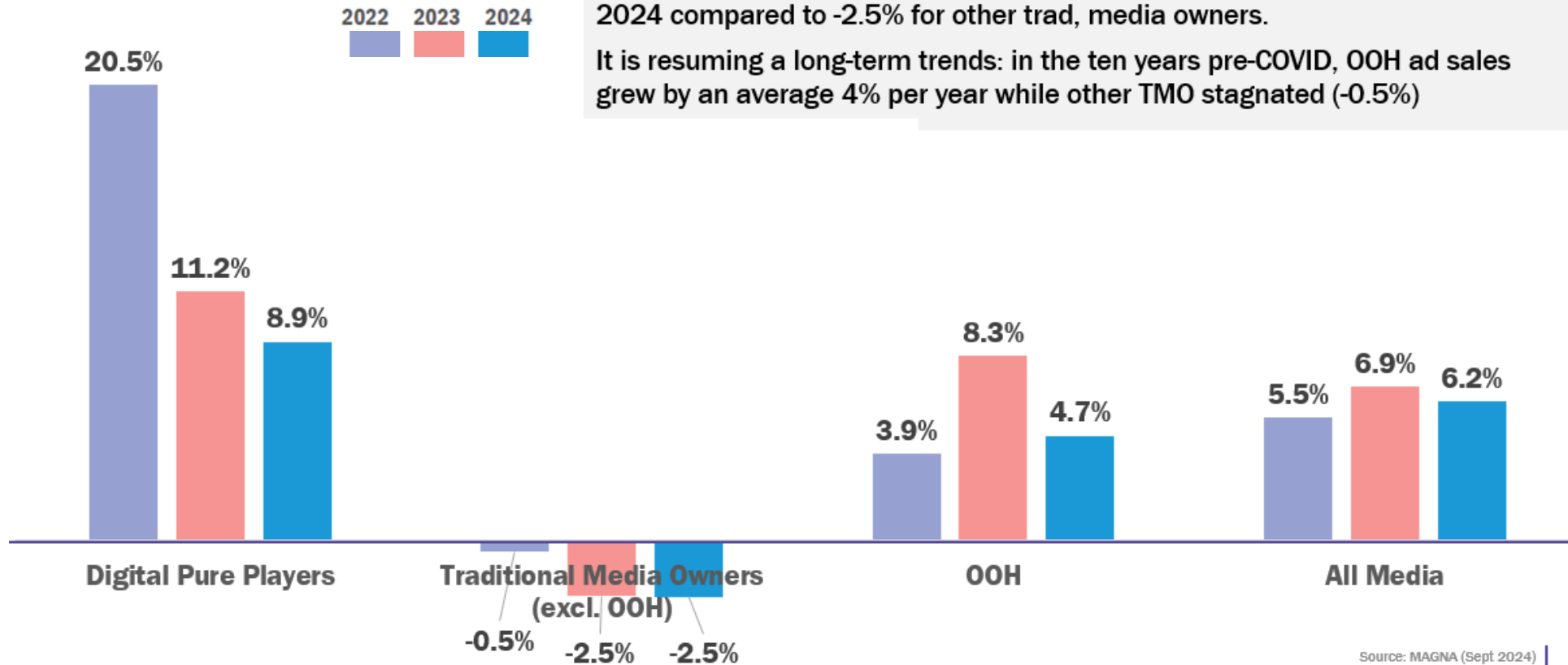
OOH Ad Sales: Annual Growth



Source: MAGNA, OAAA (March 2025) |

MAGNA: Core Media Segment Growth 2022 - 2024

Ad Revenue Growth



Post COVID recovery, OOH outperforms other traditional media channels (TV, print, radio) with net ad revenues growth by an average 8% per year over 2022-2024 compared to -2.5% for other trad, media owners.

It is resuming a long-term trends: in the ten years pre-COVID, OOH ad sales grew by an average 4% per year while other TMO stagnated (-0.5%)

Source: MAGNA (Sept 2024) |

MAGNA: US Total Core Media 2024 Growth + 2025 Forecast

M/GNA

US Ad Forecast (Spring 2025)

11

2024

- Total media grew 9.9%
 - OOH grew 5.0%
(OAAA reported +4.5% incl. Cinema)

2025 Forecast

- Total media growth of 6.7%
 - OOH growth of 4.4%

Executive Summary Key Figure Table

| (Excl Cyclical) | 2024 (\$BN) | 4Q24 | FY24 | 2024 PREV | FY25 | 2025 PREV |
|---------------------------------|----------------|-------|-------|--------------|--------|--------------|
| All Media (excl. CE) | 371.1 | 8.6% | 9.9% | 9.9% | 6.7% | 7.3% |
| All Media (incl. CE) | 380.2 | 13.0% | 12.4% | 12.4% | 4.3% | 4.9% |
| Traditional Media (excl. CE) | 101.4 | -0.8% | -1.0% | -1.1% | -1.0% | -0.9% |
| Traditional Media (incl. CE) | 108.6 | 11.3% | 5.7% | 5.6% | -7.2% | -7.2% |
| National TV | 46.5 | 0.5% | -0.6% | -1.2% | -1.1% | -1.5% |
| of which Linear Networks | 35.6 | -3.2% | -5.4% | -6.2% | -5.9% | -6.8% |
| of which AVOD, CTV, FAST | 10.9 | 17.3% | 18.9% | 19.5% | 14.3% | 15.9% |
| Local TV (excl. CE) | 17.1 | -6.2% | -4.7% | -4.0% | -3.7% | -3.4% |
| Local TV (incl. CE) | 23.1 | 56.2% | 25.5% | 26.1% | -27.0% | -26.7% |
| Radio | 12.6 | -4.5% | -3.2% | -3.0% | -3.2% | -2.7% |
| Publishing | 15.2 | -0.7% | -1.2% | -1.8% | -2.0% | -1.6% |
| OOH | 9.7 | 4.2% | 5.0% | 5.4% | 4.4% | 5.0% |
| Cinema | 0.3 | -5.7% | -7.4% | -1.0% | 7.0% | 15.0% |
| Digital Pure Players (excl. CE) | 269.6 | 12.7% | 14.8% | 14.8% | 9.6% | 10.4% |
| Digital Pure Players (incl. CE) | 271.6 | 13.8% | 15.4% | 15.4% | 9.1% | 9.9% |
| Social Media | 83.4 | 16.2% | 17.6% | 17.2% | 10.7% | 11.5% |
| Core Search | 106.4 | 11.8% | 14.2% | 14.3% | 7.6% | 9.2% |
| Retail Search | 45.6 | 17.6% | 20.2% | 20.2% | 14.3% | 14.3% |
| Short Form Pure Play Video | 22.4 | 12.7% | 14.3% | 14.4% | 8.6% | 7.5% |
| Digital Audio | 3.2 | 2.4% | 3.7% | 4.2% | 3.7% | 4.2% |
| Direct Mail | 17.0 | 2.4% | 2.2% | 1.2% | -3.5% | -3.4% |

Source: MAGNA, Rapport

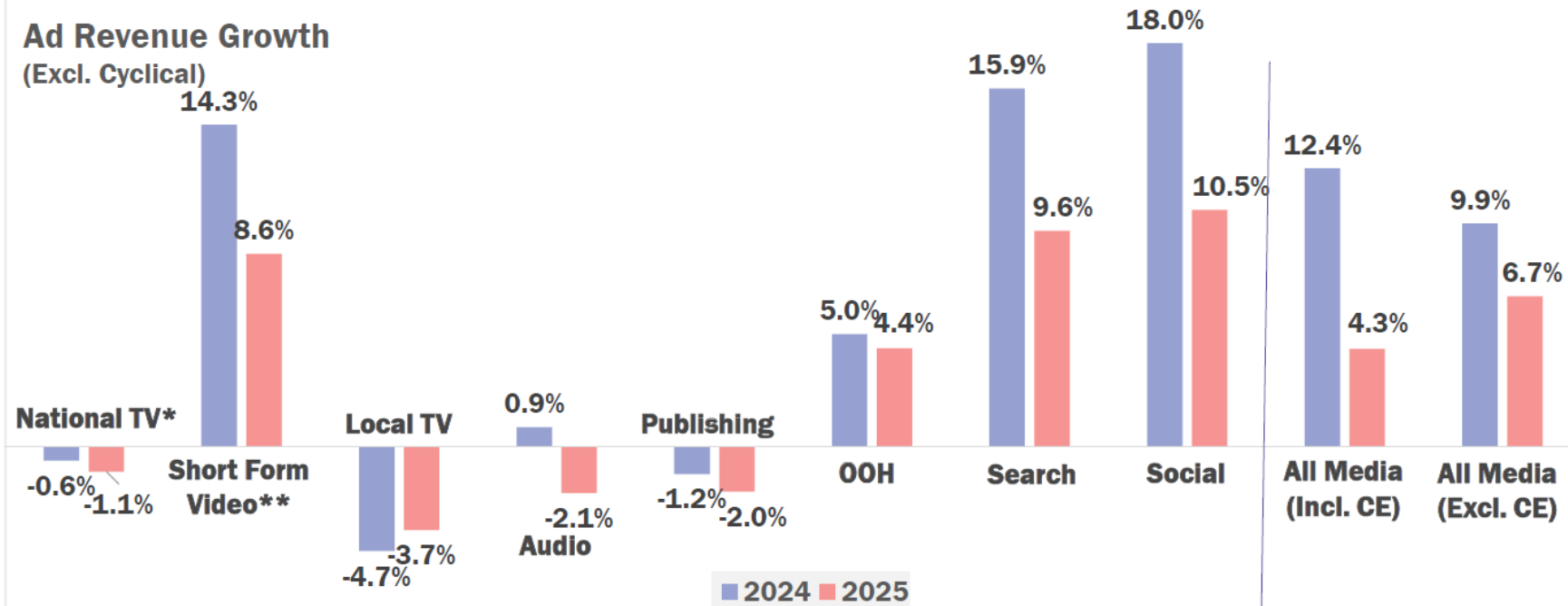
MAGNA: OOH Outperforms All Non-Digital Channels 2024 - 2025

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Executive Summary FY2025 Forecast: +4.3% (+6.7% Excl. Cyclical)

Ad Revenue Growth (Excl. Cyclical)

US Ad Forecast (Spring 2025)



* National TV includes ad sales from long form premium AVOD formats (Hulu, Peacock, Netflix, Disney+, Amazon Prime etc) and FAST feeds.
**Short-Form Pure Play Video includes Youtube, Twitch

Source: MAGNA (March 2025)
CE= Cyclical events (Political + Olympics)

M/GNA

Executive Summary

Key Figures: Long Term Drivers/Inhibitors

US Ad Forecast (Spring 2025)

| | 2024 | 2025 | 2026 |
|--|---------------|-------------------------------|-------------------------------|
| Economic Cycle | + | +/- | + |
| Organic Drivers Innovation, Retail Media, AVOD | + | + | + |
| Cyclical Events Elections, Sports | +++ | -- | ++ |
| Total Ad Market Growth (incl. Cyclical) | +12.4% | +4.3% (Prev: +4.9%) | +8.0% (Prev: +8.4%) |
| Total Ad Market Growth (excl. Cyclical) | +9.9% | +6.7% (Prev: +7.3%) | +6.3% (Prev: +6.7%) |

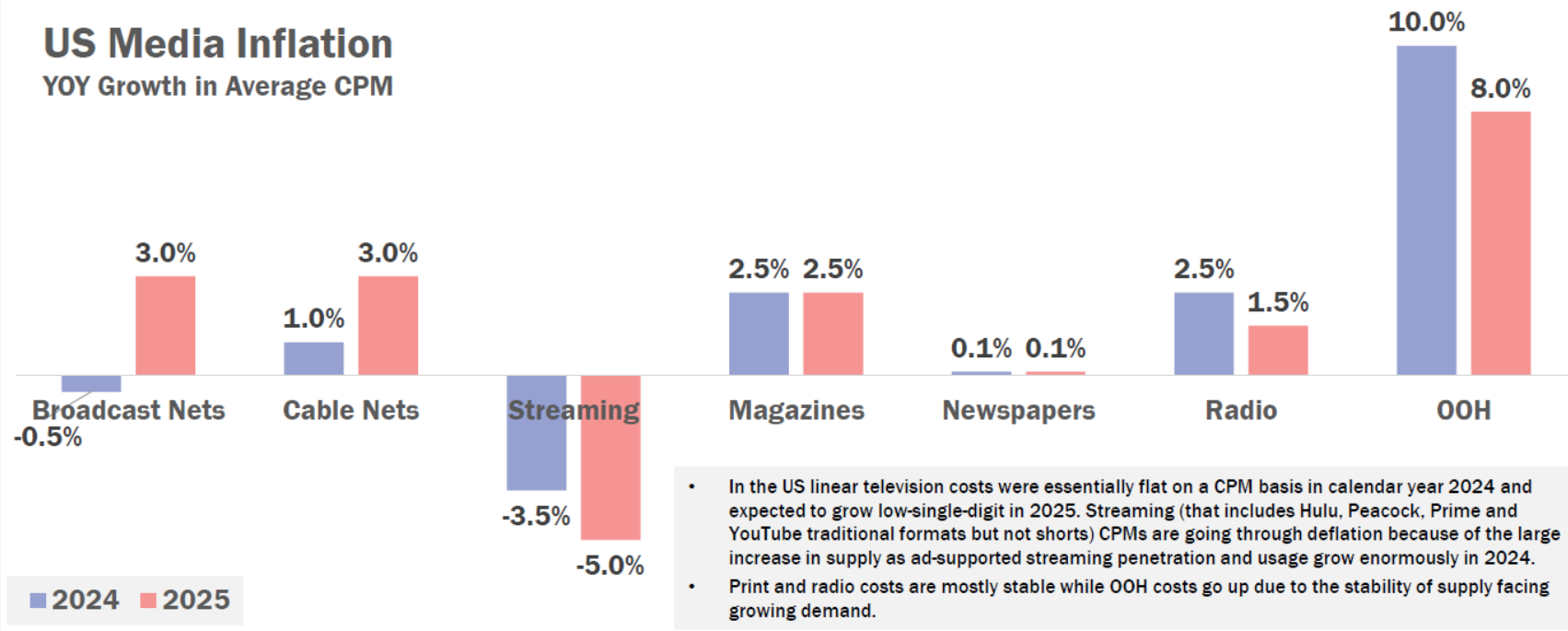
MAGNA: US Core Media Inflation Rates 2024 - 2025

M/GNA

Media Costs Linear TV Flat and Instream in Deflation

US Ad Forecast (Spring 2025)

US Media Inflation YOY Growth in Average CPM



30

Notes: Broadcast & Cable Networks: calendar year average, adults 18-49, Prime 30" linear commercials (averaging upfront and scatter). Streaming: 30" Premium platforms. Magazines: Full Color Page. Radio: 30" morning drive, adults 25-54. OOH: average of all formats, all adults.

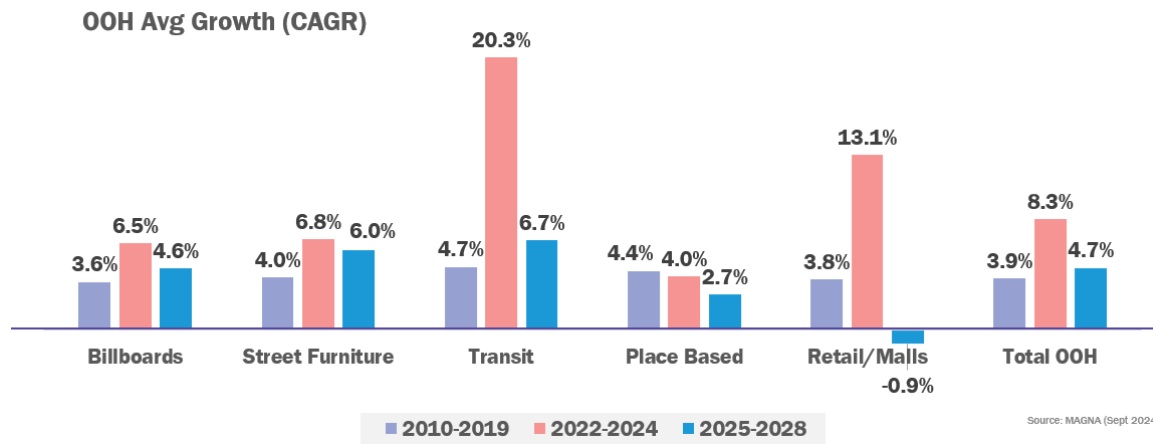
Source: MAGNA Inflation Report (December 2024, March 2025)

MAGNA: Long Term Growth by OOH Segment 2010 - 2029

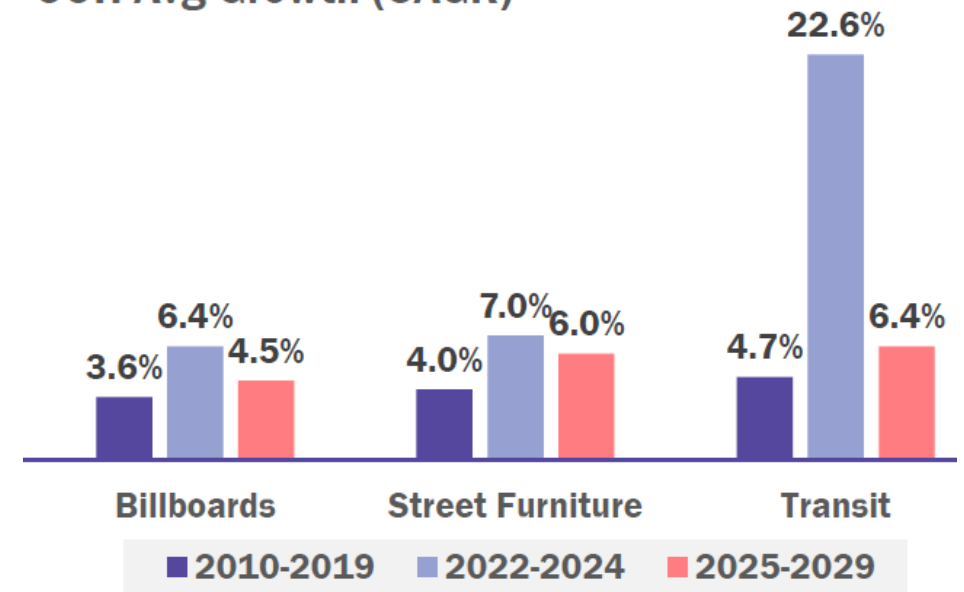
September 2024 Estimate



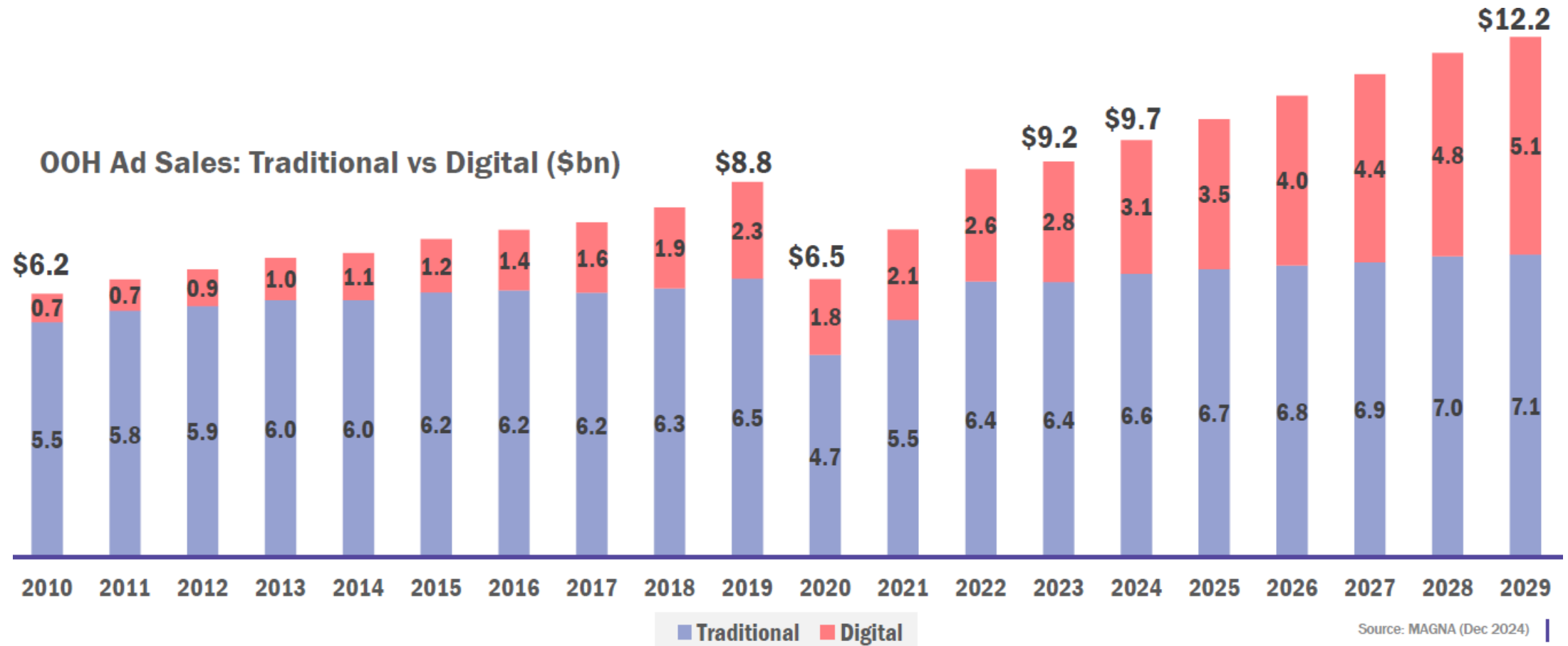
December 2024 Estimate



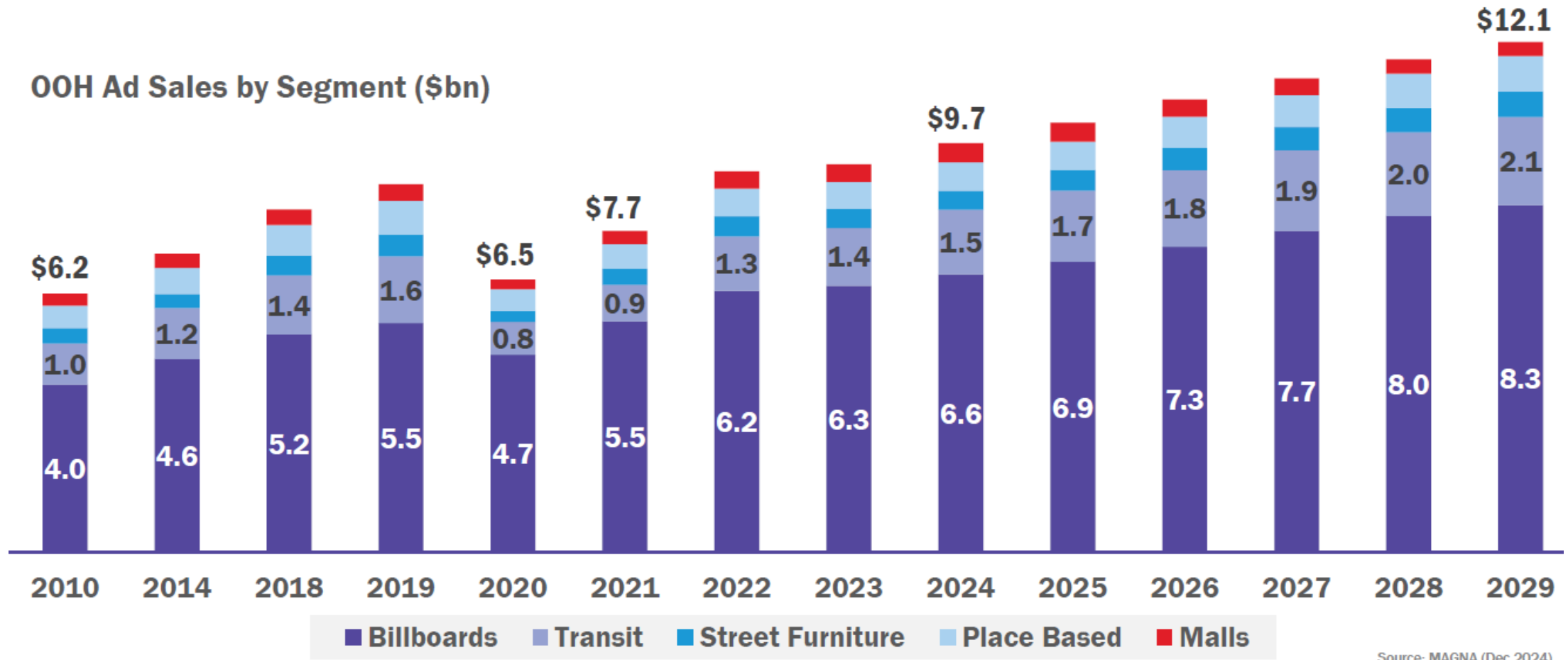
OOH Avg Growth (CAGR)



MAGNA: OOH Long Term Growth Trend through 2029



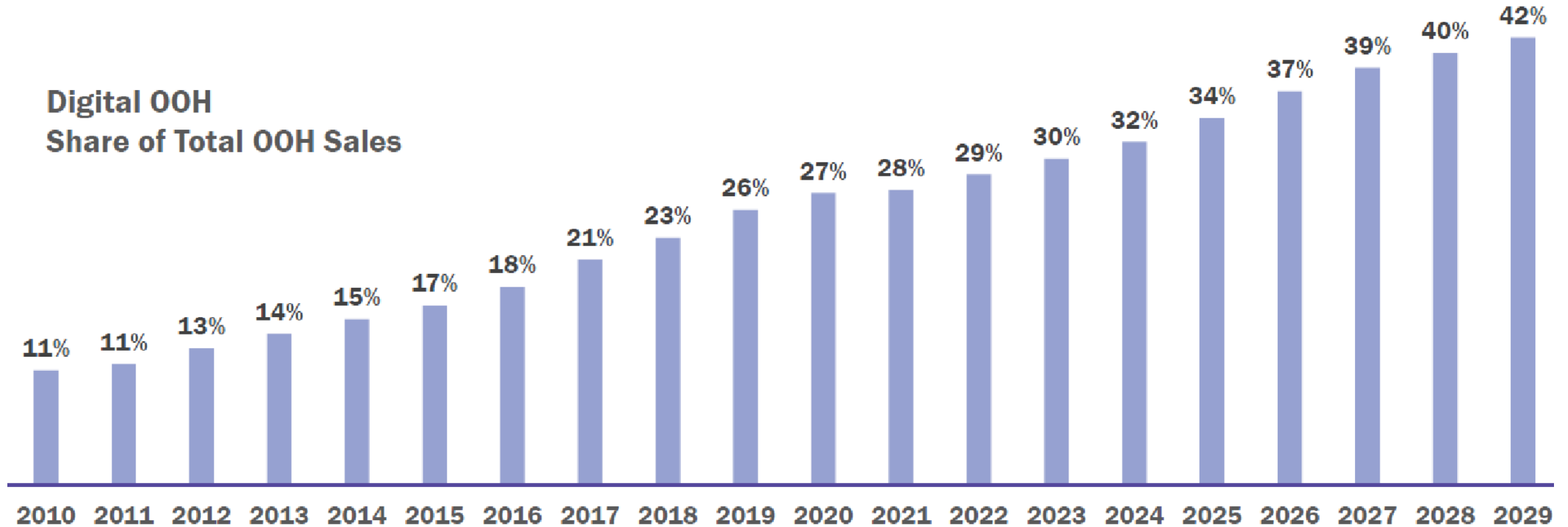
MAGNA: OOH Long Term Category Growth through 2029



Source: MAGNA (Dec 2024)

MAGNA: DOOH Share of Total OOH Spend 2010 - 2029

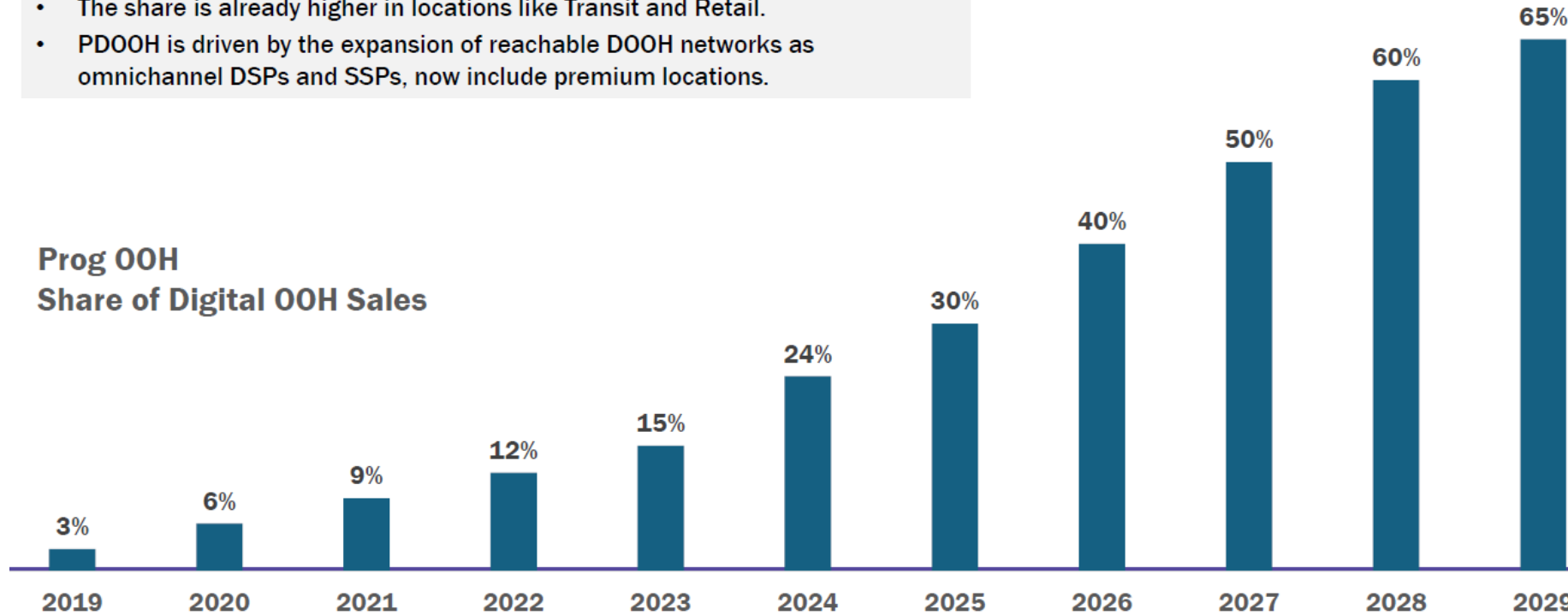
Digital OOH
Share of Total OOH Sales



Source: MAGNA (Dec 2024); excludes cinema

Programmatic DOOH Takes Off

- Programmatic spending accounted for approx. 15% of national DOOH spending in 2023 and **24% in 2024**. It will reach 65% by 2029.
- The share is already higher in locations like Transit and Retail.
- PDOOH is driven by the expansion of reachable DOOH networks as omnichannel DSPs and SSPs, now include premium locations.



Source: MAGNA, Rapport