



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

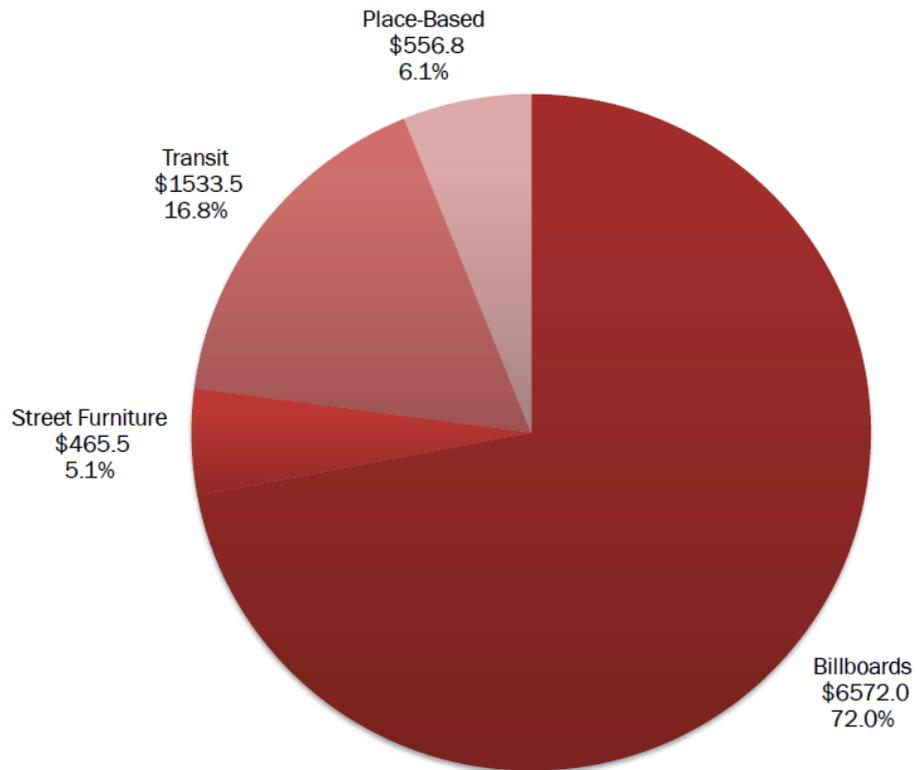
2024 OOH Advertising Displays Nationwide



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

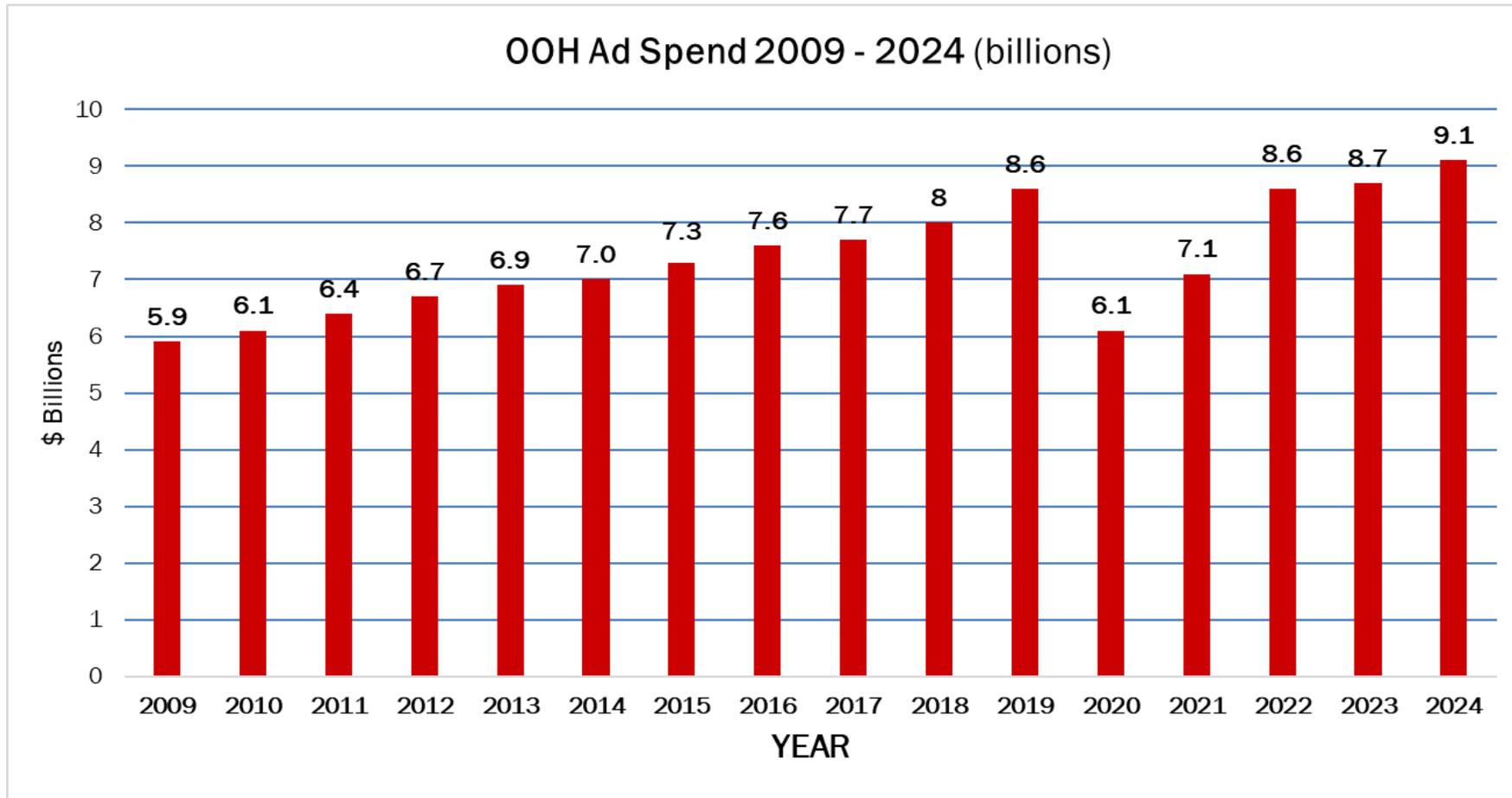
- Billboards +3.6
- Street Furniture +5.0%
- Transit +10.6%
- Place-Based -1.6%

+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

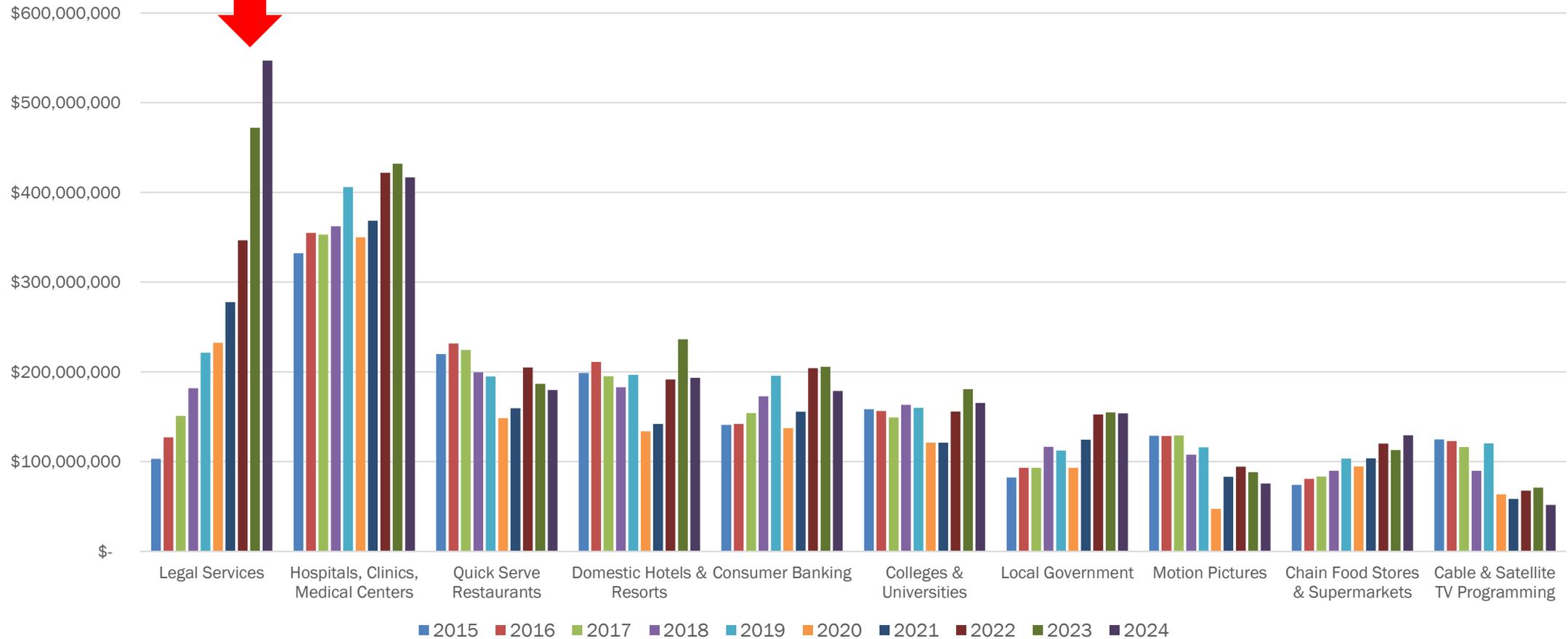
The top 25 product categories account for 53% of total OOH spend



Source: MediaRadar

OOH Ad Spend: Product Category Trends 2015 - 2024

Top Ten OOH Spend Product Categories 2015 - 2024



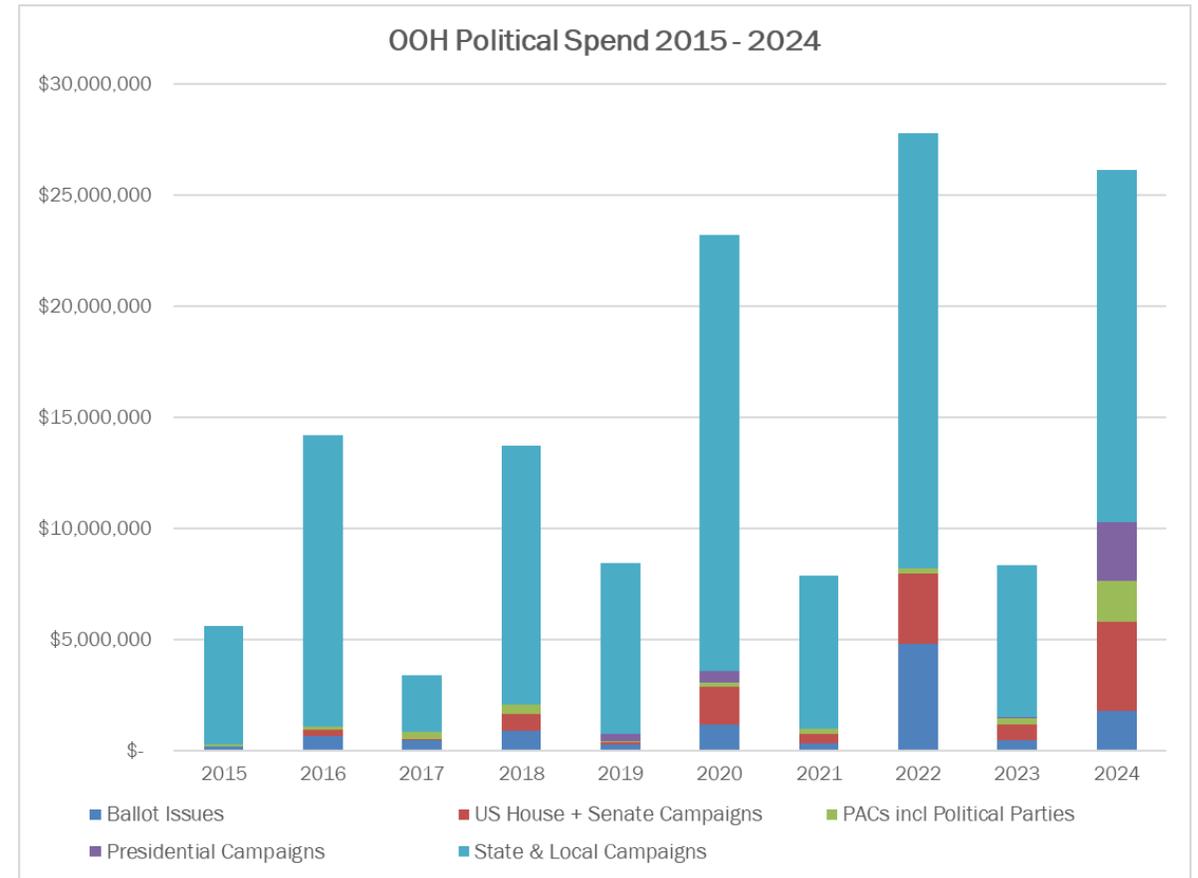
NOTE: OAAA estimates Vivvix under reports OOH spend by approximately 30%, so data in this chart is best used for longitudinal analysis.

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 Vivvix 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

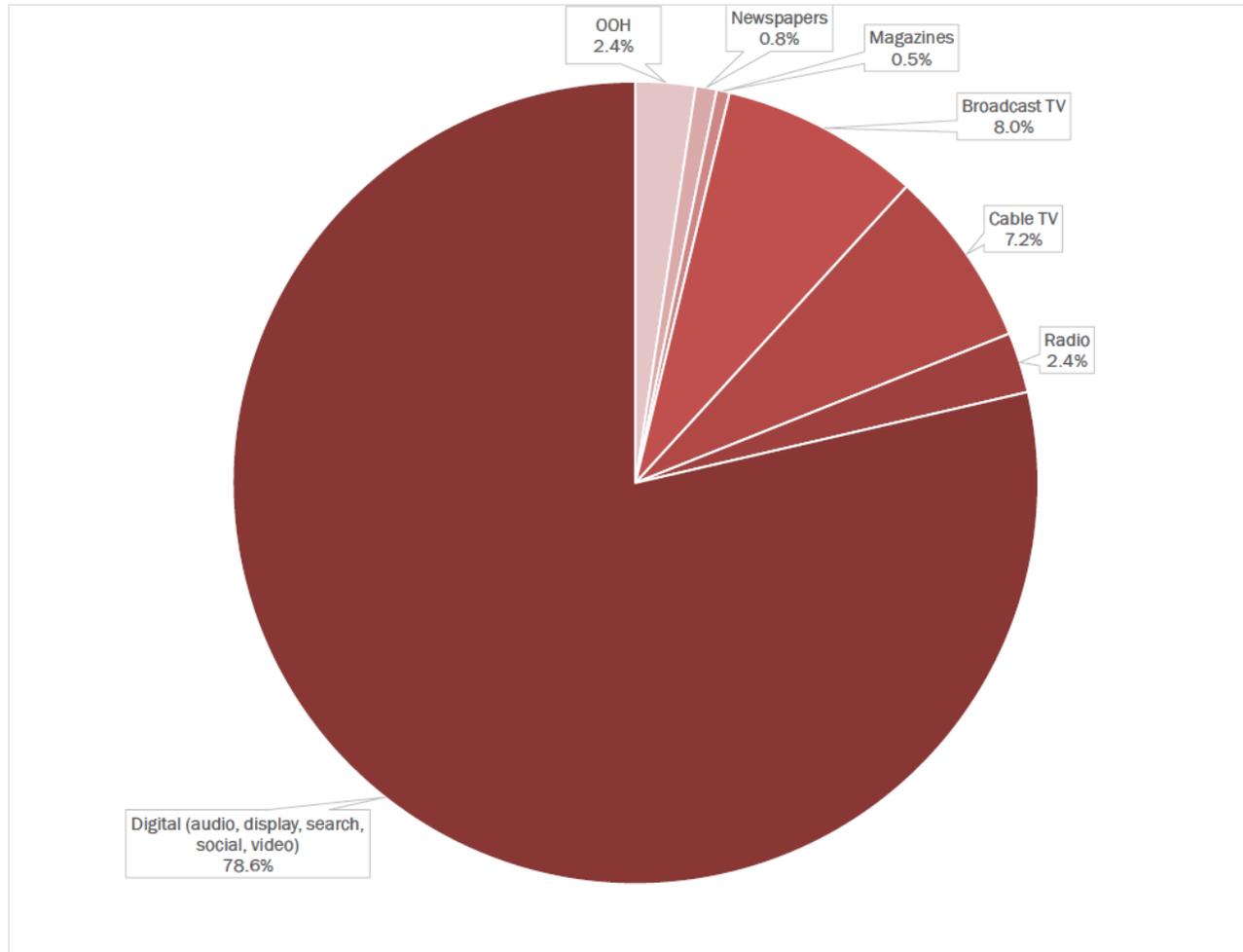
[Access the full report here](#)

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](#)

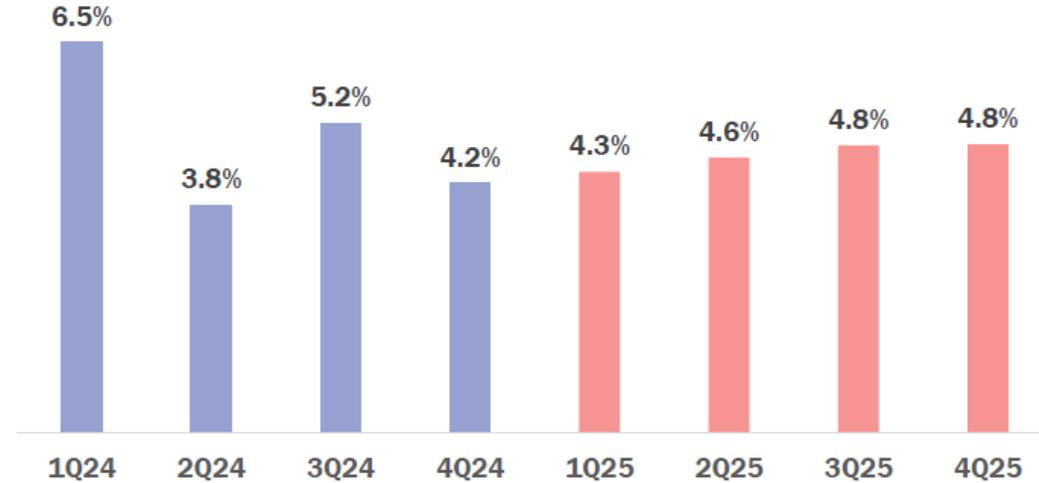
Source: MAGNA, OAAA

MAGNA: OOH Quarterly Growth 2024 - 2025

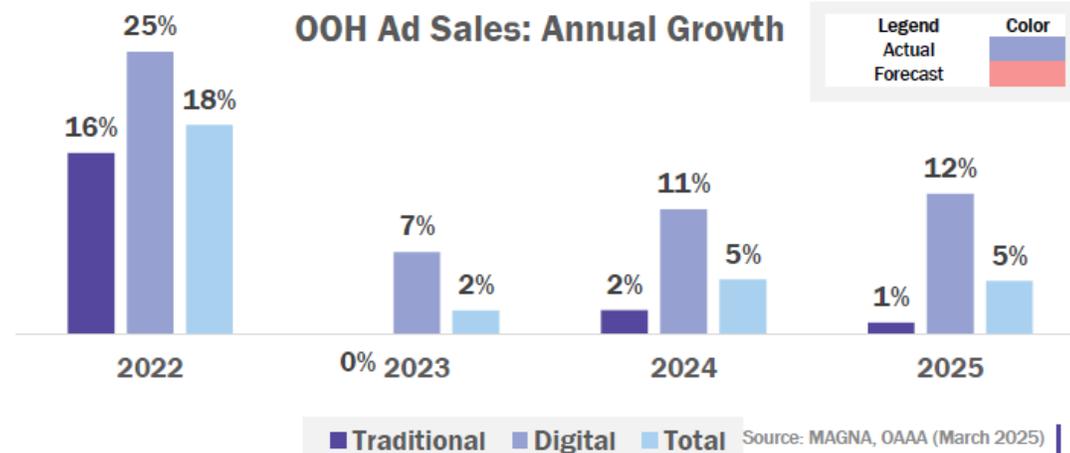
OOH sales rose +4.2% in 4Q24, capping off a strong year.

- 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



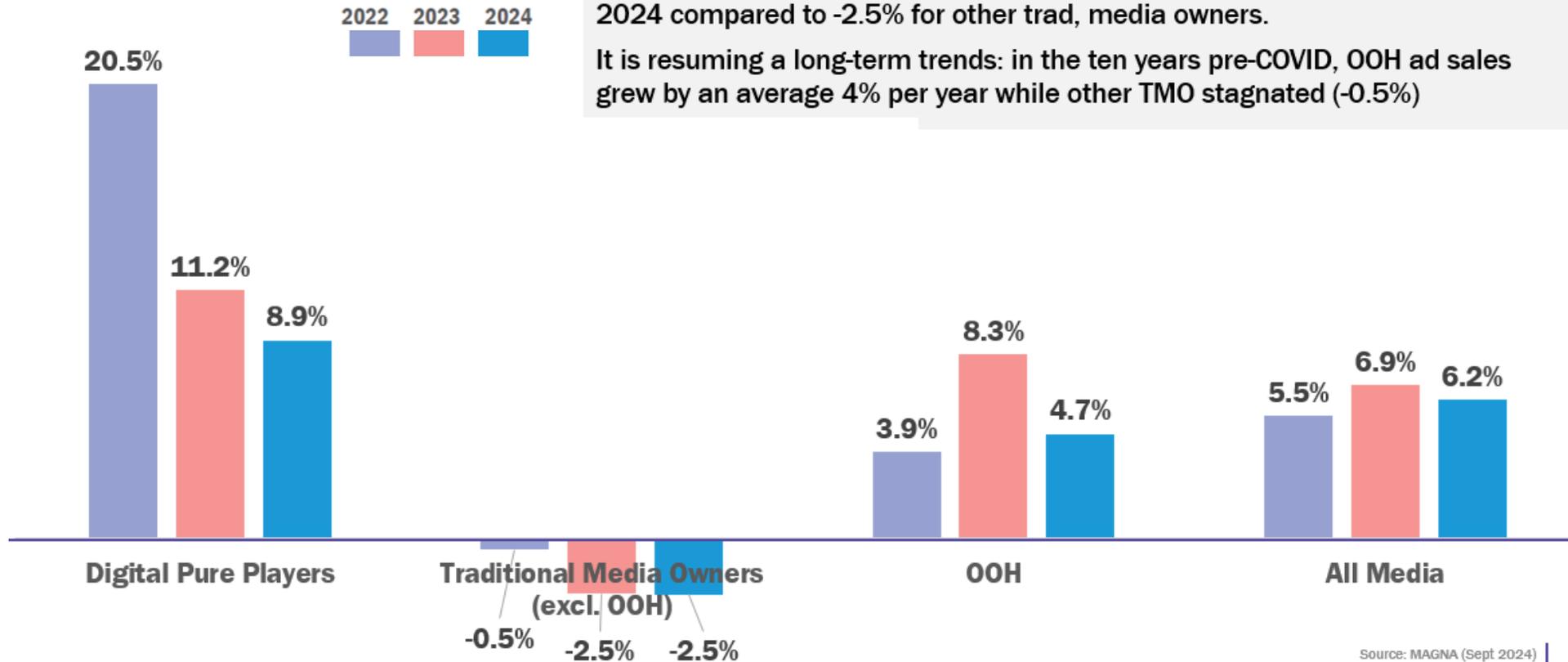
OOH Ad Sales: Annual Growth



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)

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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

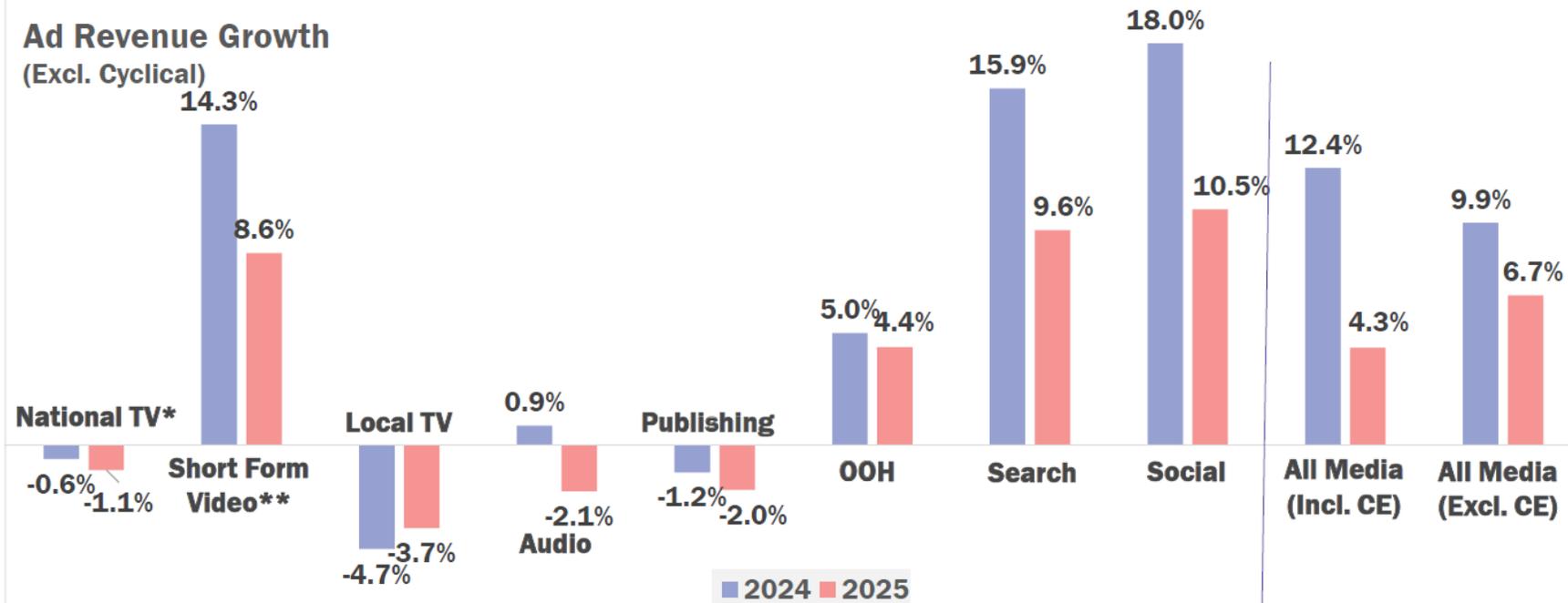
M/GNA

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)

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Executive Summary

Key Figures: Long Term Drivers/Inhibitors

US Ad Forecast (Spring 2025)

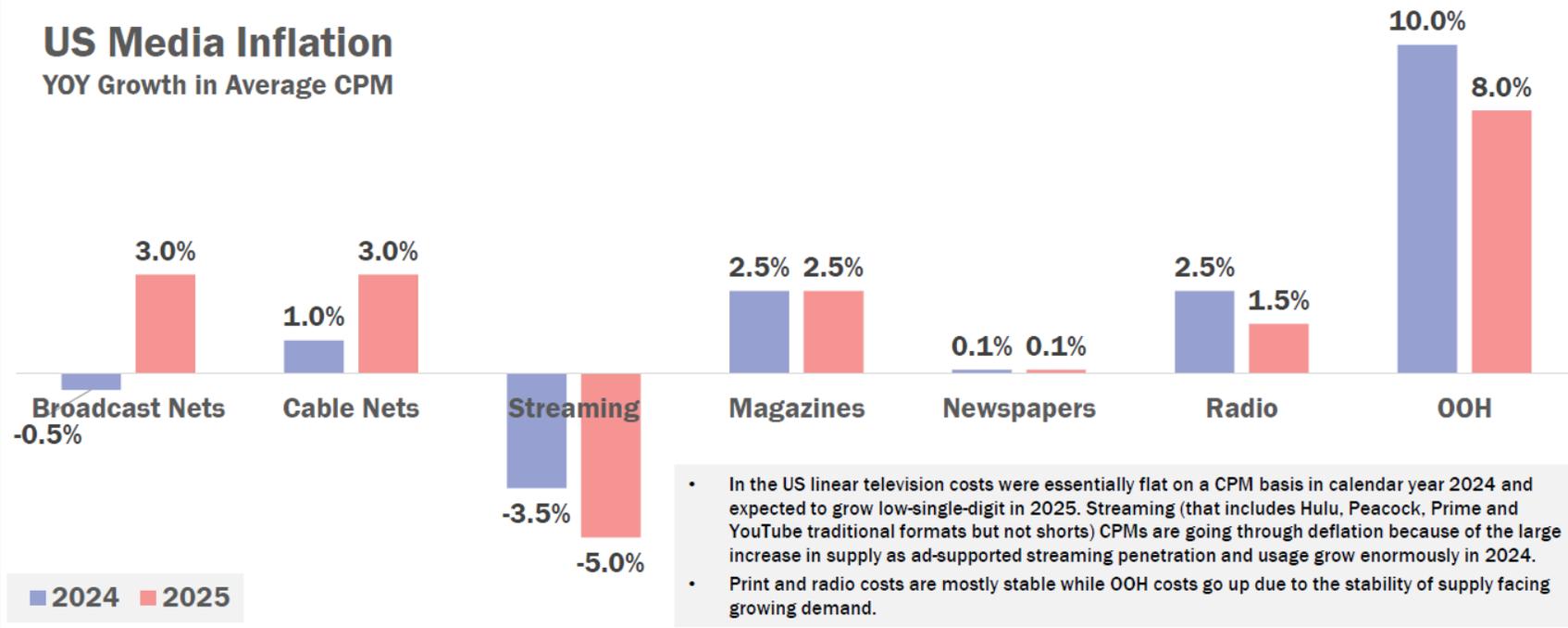
	2024	2025	2026
Economic Cycle	+	+/-	+
Organic Drivers Innovation, Retail Media, AVOD	+	+	+
Cyclical Events Elections, Sports	+++	--	++
Total Ad Market Growth (incl. Cyclical)	+12.4%	+4.3% (Prev: +4.9%)	+8.0% (Prev: +8.4%)
Total Ad Market Growth (excl. Cyclical)	+9.9%	+6.7% (Prev: +7.3%)	+6.3% (Prev: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

M/GNA

Media Costs Linear TV Flat and Instream in Deflation

US Ad Forecast (Spring 2025)

US Media Inflation YOY Growth in Average CPM



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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.

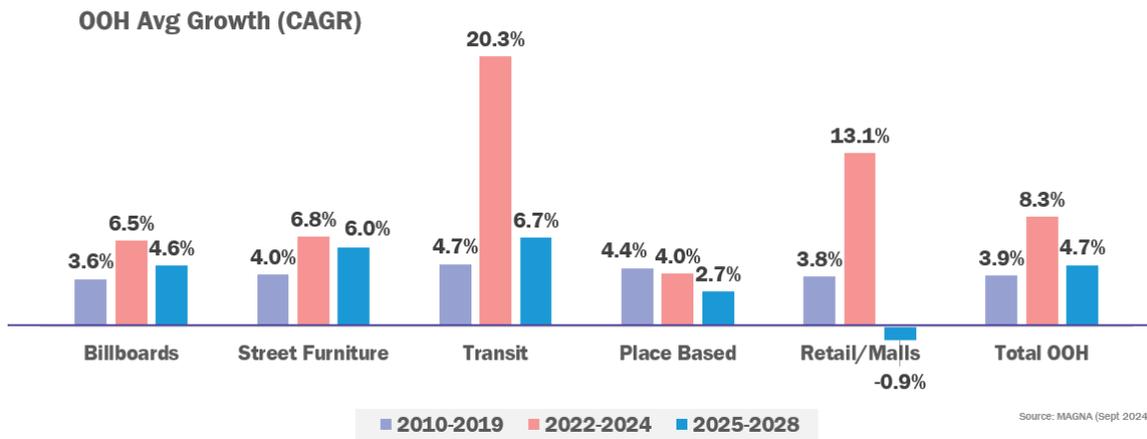
Source: MAGNA Inflation Report (December 2024, March 2025)

MAGNA: Long Term Growth by OOH Segment 2010 - 2029

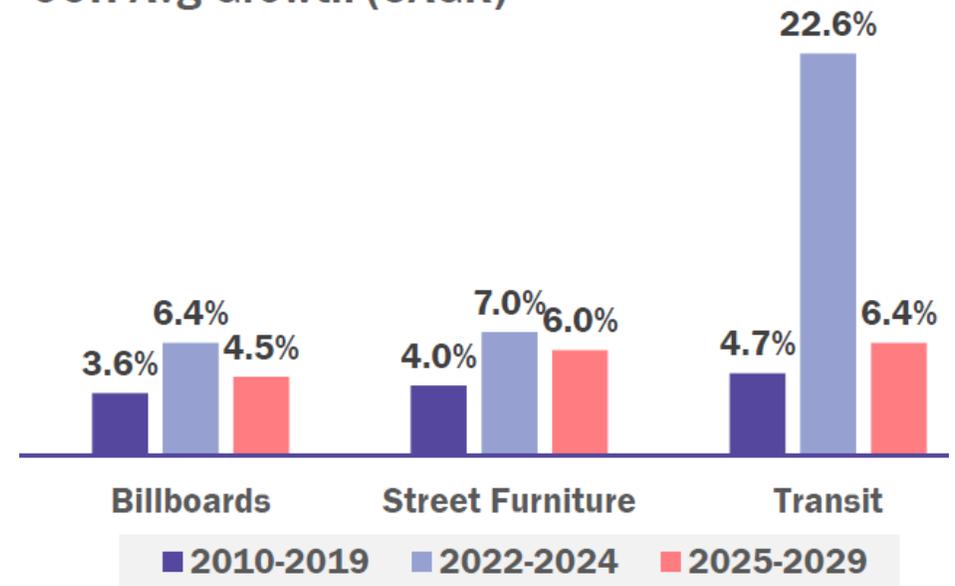
September 2024 Estimate



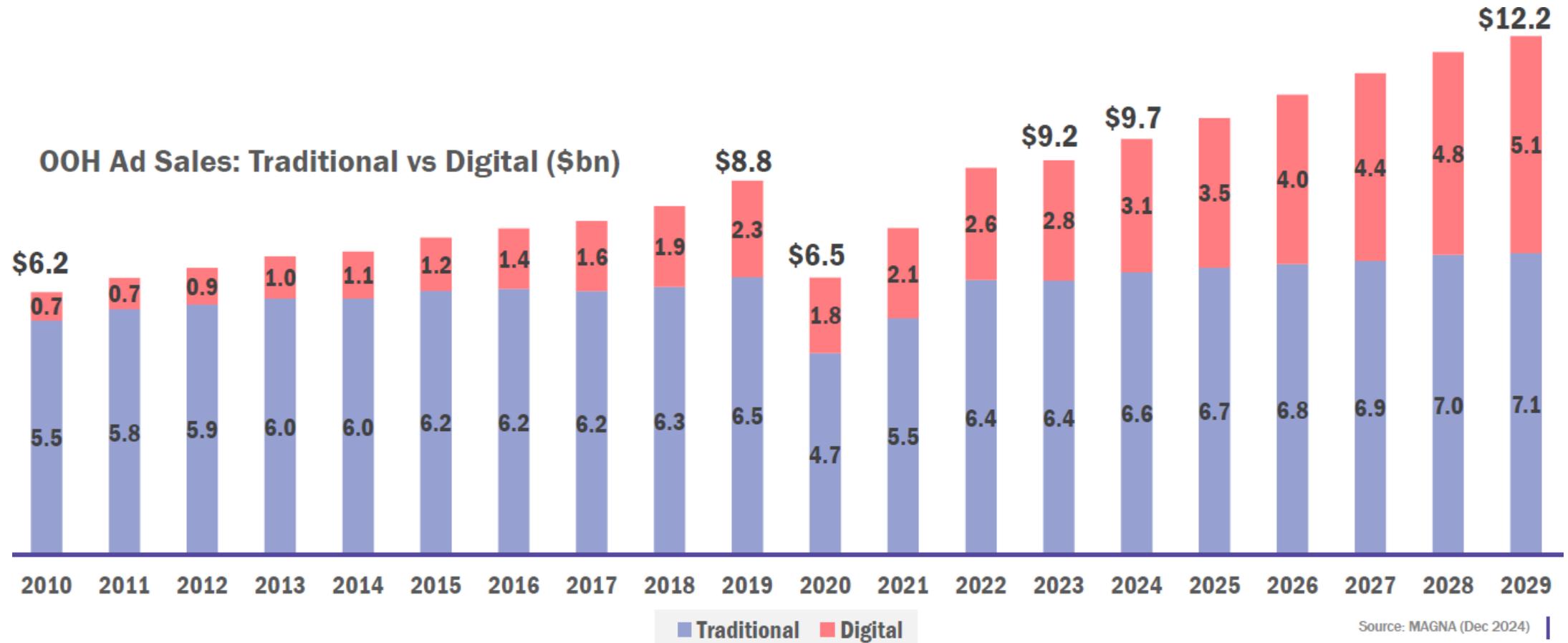
December 2024 Estimate



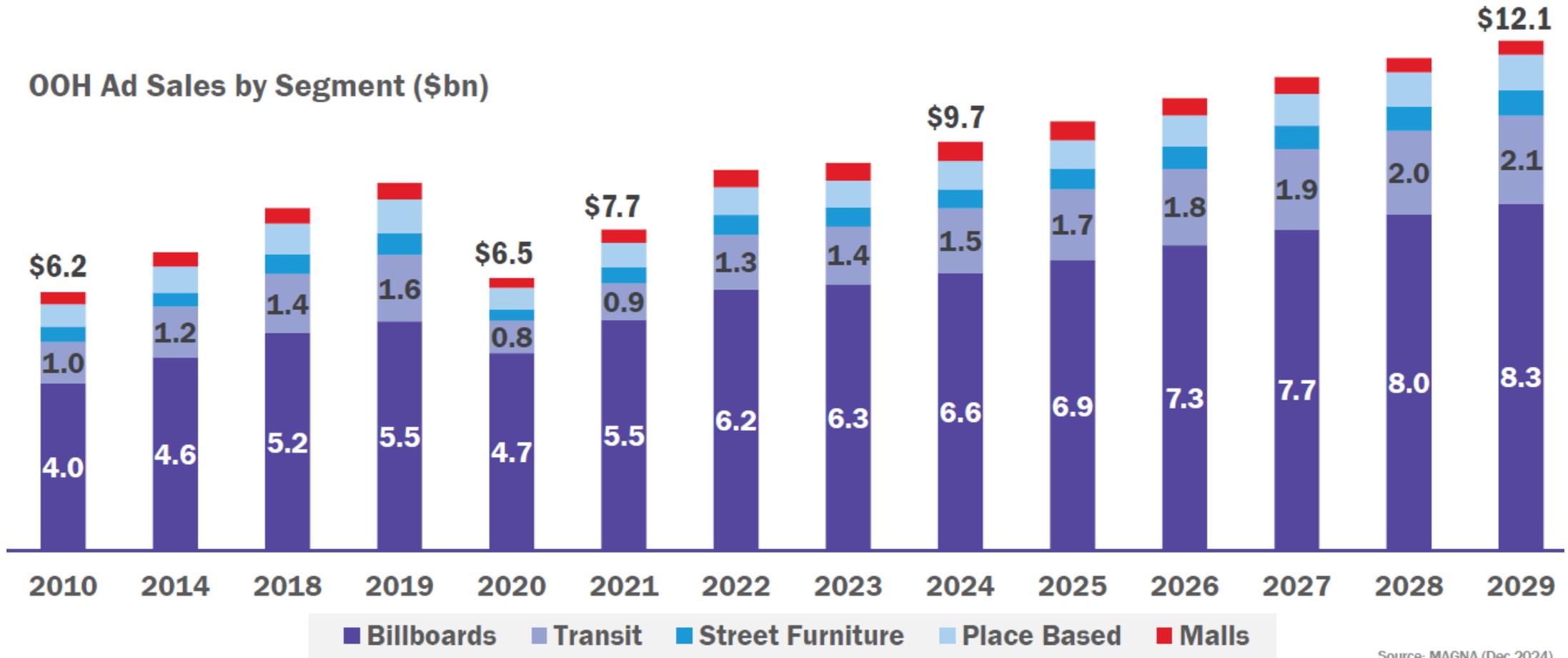
OOH Avg Growth (CAGR)



MAGNA: OOH Long Term Growth Trend through 2029



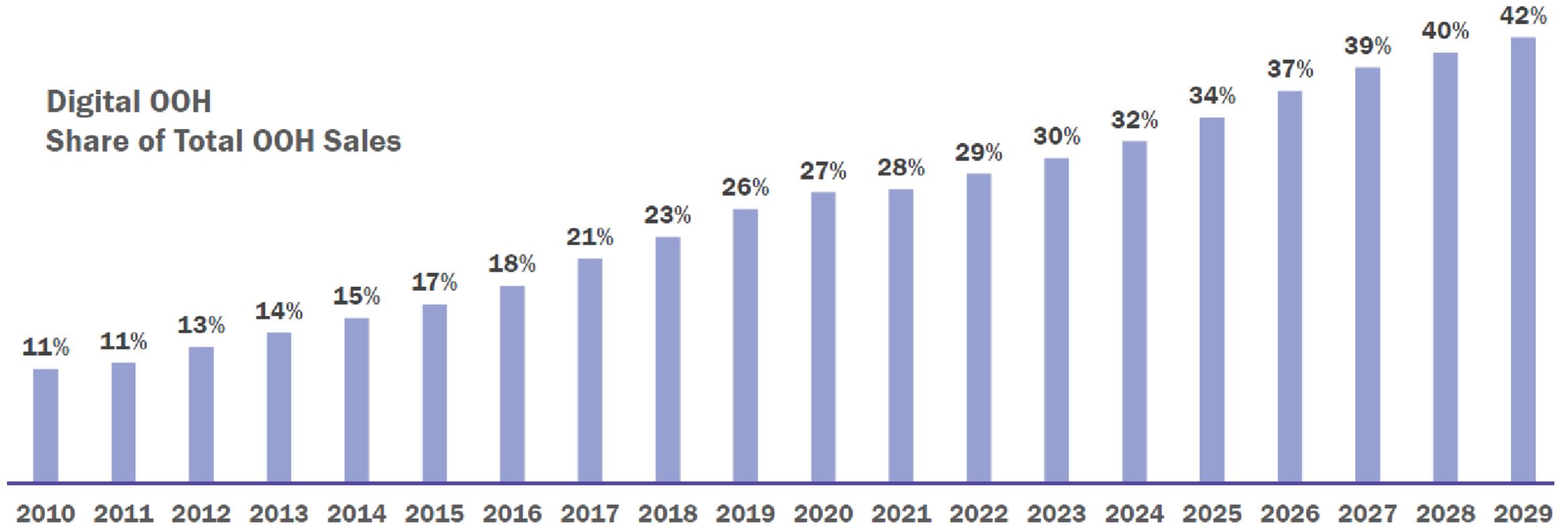
MAGNA: OOH Long Term Category Growth through 2029



Source: MAGNA (Dec 2024)

MAGNA: DOOH Share of Total OOH Spend 2010 - 2029

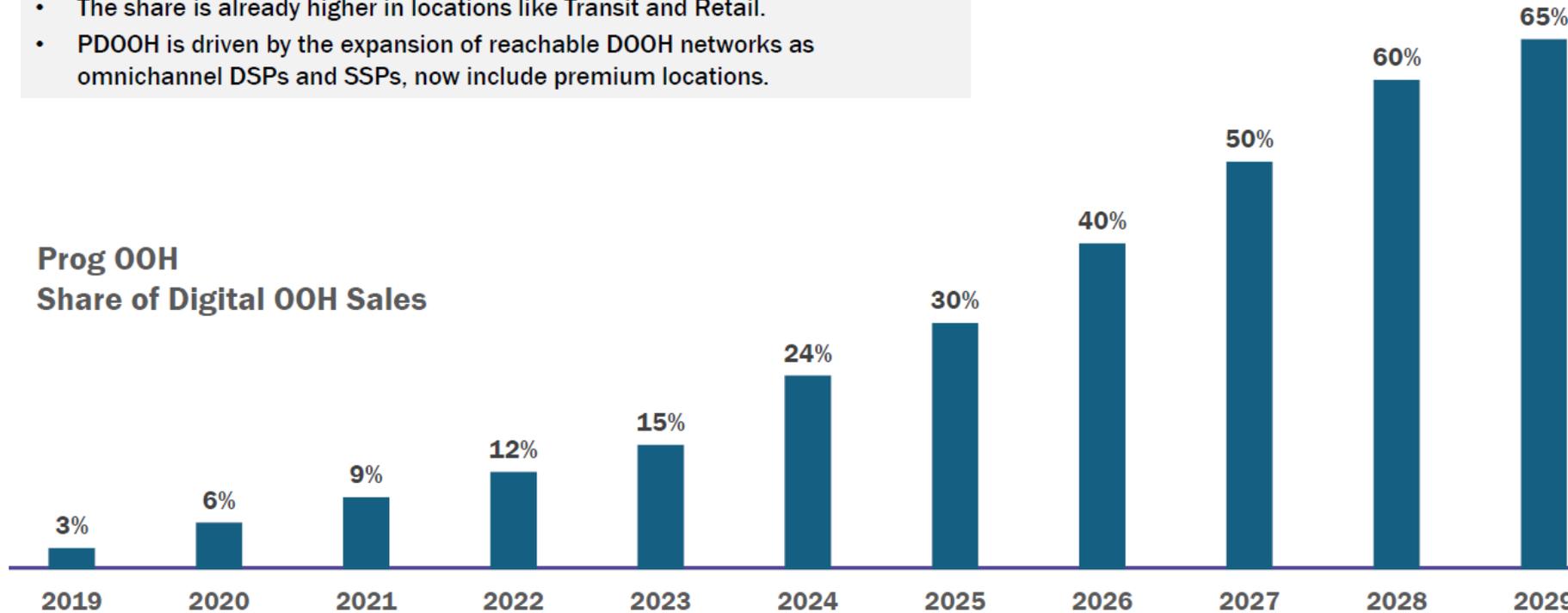
Digital OOH
Share of Total OOH Sales



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