



Outdoor Advertising Association of America

2017 Annual Report: OOH Advocacy... With Breadth and Depth

January 2, 2018



OAAA Members, Colleagues, and Friends:

Humorist Edgar Nye introduced the phrase, “A mile wide and an inch deep,” referring to the Platte River.

Like a river, OAAA is nonstop. But, unlike Nye’s Platte River, OAAA has breadth and depth, serving as your advocate, standards-setter, definitive source for facts and statistics, and the voice of a united OOH industry.

I’m often asked about the “typical day” at OAAA (there’s no such thing). On any day, OAAA might be lobbying Congress, promoting strengths of the medium, helping members sell and advocate, launching public service, or sharing your achievements with the world.

Take a look at the 24-hour period starting November 29:

- At the Advertising Club of New York – for the 10th year – OAAA presented the latest OOH Media Plan Awards, with top honors to Sony Pictures for *The Emoji Movie* campaign. At that event, OAAA unveiled new Nielsen research proving OOH activates online behavior, generating press buzz and more downloads than any OAAA report in 2017.
- Afterwards, OAAA’s Steve Nicklin would traverse Manhattan to the impressive new headquarters of Intersection, discussing the latest OOH research with the company’s engaged marketing team. That was Steve’s 20th marketing presentation at an OAAA-member company this year, in addition to his 75 agency visits.
- In Tennessee, leaders of the state association signed authorization for a friend-of-the court brief, part of OAAA’s plan to protect industry property rights in federal court. On that day OAAA attorney Kerry Yoakum was in Madison, WI, planning legal-legislative strategies with the state association.
- In Los Angeles, movie buff and Billups CCO Rick Robinson bought a ticket to see the award-winning film *Three Billboards Outside Ebbing, Missouri*. Rick and OAAA are preparing to showcase the power of posters as this film heads into Oscar season.
- From Pocatello, ID, a general manager reported that OAAA materials helped stop a billboard ban that was threatening his business.
- At OAAA’s office in Washington, DC, Myron Laible hosted a no-fee webinar on worker safety, featuring experts from Formetco, Lamar Advertising Company, and Meadow Outdoor Advertising. It was one of 25 OAAA webinars presented in 2017 for the enrichment of members.
- And, also on November 29, the chairman of the House Transportation & Infrastructure Committee published a tribute to OAAA’s 10-year partnership with the FBI in the *Congressional Record*, part of the permanent history of our nation.

This 24-hour snapshot, reflecting our shared passion for OOH, introduces OAAA’s 2017 Annual Report. Please read on to learn about the full-year accomplishments of your trade association.

With gratitude,

Nancy Fletcher, OAAA President & CEO

2017-2019 OAAA Leadership



Sean Reilly

OAAA Executive Committee

Chair

Sean Reilly
Lamar Advertising Company

President & CEO

Nancy Fletcher
OAAA

Secretary

Jeremy Male
OUTFRONT Media

Treasurer

Ari Buchalter
Intersection

OAAA is a passionate advocate and a progressive thought leader for the out of home (OOH) advertising industry. The organization, its staff, and Board of Directors protect, unite, and, advance interests of the OOH medium, helping it to adapt and prosper in a rapidly changing media landscape.

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Clear Channel Outdoor

Vice Chair, Legislative

Patrick O'Donnell
YESCO Outdoor Media

Vice Chair, Marketing

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JCDecaux North America

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Interstate Outdoor Advertising

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Jim McLaughlin

Link Media Outdoor

Jim Moravec

Stott Outdoor Advertising

Ray Moyers

Signal Outdoor

Richard Peterson

Porter Advertising LLC

Steve Richards

Mile High Outdoor Advertising

Pudge Roberts

Coastal Outdoor Advertising

Debra Thompson

Cleveland Outdoor Advertising

Mike Zukin

Meadow Outdoor

OOH... The Beginning of a New Golden Age

Douglas Watts was the outdoor "brand" officer who helped OAAA when he was a partner with Russo, Watts, & Rollins in the late 80s and early 90s. Watts is now a strategic communications consultant and president of Urban Media Group. In April, he emailed OAAA's Nancy Fletcher to express his excitement about how far the OOH industry has come in the last 25 years. What follows are his words:

"A rather remarkable transformation in the media marketplace has taken place in the last 25 years.

OOH was considered old fashioned, one-dimensional, hard to measure, hard to buy, and hard to schedule. Frequently, it was added to major campaigns simply to lower the CPMs. Having lost its largest client and battling federal, state, and local regulators, many thought OOH was on its last legs. We were so envious of the core of MSM (mainstream media).

Today, the landscape is quite different:

- Newspapers are on their knees, because they waited too long to adapt. RIP, but for a few.
- Broadcast TV is being overrun by the internet and indepen-

dent studios and film production companies and is considered passe by the coveted 18-34 market. Most think they have less than five years to live in their current format.

- Radio, still on very shaky ground, did adapt rather aggressively, but it is nothing like the premium medium it once was.
- The internet is the catalyst for much of the change that's occurred, but rather than hurt, it has served to enhance OOH operationally, creatively, and commercially.

Today, OOH is truly meeting the expectations of its moniker; diverse, omnipresent, and integral to any effective ad campaign. Bobbing and weaving with the regulatory challenges by turning municipal foes into partners, recreating itself as a digital medium, and setting new creative norms for agencies to master and audiences who demand succinct messaging, OOH has undoubtedly reached the beginning of a new golden age.

While those other mediums are crippled and fading, OOH has survived, adapted, and succeeded. OOH is not only still standing, it is standing tall. Your members and the industry as a whole have much to be proud of."

Legislative Report

OAAA was the voice of a united industry in court, Congress, and city hall.

Legal Advocacy

On October 16, the US Supreme Court ended Scenic America's four-year legal attack on digital billboards by denying to hear Scenic's case, which had failed in lower courts.

In 2013, the anti-billboard group sued the federal transportation agency which had provided guidance to the States in 2007 on how to regulate digital billboards. A federal judge dismissed the case; the dismissal was upheld on appeal. Scenic America petitioned the US Supreme Court to take the case. When the high court declined to take the case in 2017, the lawsuit ended.

"If there is an issue, good or bad, OAAA is there to defend, protect, and advocate for our industry. We count on OAAA to be our eyes, ears, and our conscience."

Debbie Abdalian-Thompson
Cleveland Outdoor Advertising

OAAA had intervened on behalf of the industry, convening in-house counsel to help guide strategy and retaining experienced outside litigation counsel (Williams & Connolly). The trade association invested \$1.3 million defending digital billboards.



Mr. Speaker, I rise today to recognize an effective public-private partnership used to put fugitives behind bars.

history. In 2014, Pennsylvanians were on high alert after a man opened fire on a state police barracks, killing one state trooper and

Regulations

Digital Billboards Supreme Court Win

October 17, 2017 12:06 am - Comments Off on Digital Billboards Supreme Court Win

Views: 622

October 16, 2017 (Washington, DC)

— The US Supreme Court today denied Scenic America's appeal of its failed legal attack on digital billboards, ending a four-year legal battle.



to preserve property-rights protections for billboards in federal and state laws.

In California, a federal appeals court ruled against San Francisco's mandated warning labels on ads for sugary drinks, citing First Amendment concerns.

Federal Advocacy

In Texas, a united OOH industry opposed the state's proposal to sell corporate sponsorships of official traffic signs overhanging the highways. From US Department of Transportation (DOT) headquarters, its Federal Highway Administration (FHWA) rejected the proposal on June 7, citing federal law and regulations.

As leadership changed in Congress, OAAA managed transitions and educated newcomers to House and Senate committees with jurisdiction over OOH media.

Digital Partnerships

The FBI honored its [10-year partnership](#) with OAAA to help law enforcement on behalf of public safety. FBI Assistant Director [Stephen E. Richardson](#) delivered an in-person thank-you to the OAAA Board of Directors on November 7. He said tips generated by FBI copy on donated digital billboards had directly resulted in apprehending 57 fugitives.

In the *Congressional Record* on November 29, Rep. Bill Shuster (R-PA) praised the FBI-OAAA partnership as an effective, no-cost, innovative means to empower the public on behalf of safety. Shuster is chairman of the US House Transportation & Infrastructure Committee.

The speed and flexibility of digital technology also enables OAAA partners to communicate quickly with the public. In September, Boys & Girls Clubs of America honored Rep. Steny Hoyer (D-MD) for life-long dedication to the Clubs. Within hours, a congratulatory message appeared on digital bus shelters in Washington, DC, which was spotlighted in Capitol Hill publication [Roll Call](#).



Assisting States and Local Communities

Nationwide, OAAA assisted 17 state associations (California, Florida, Illinois, Indiana, Missouri, Montana, New Jersey, New York, North Carolina, Ohio, Oregon, Pennsylvania, South Carolina, Tennessee, Texas, Virginia, and Wisconsin).

OAAA provided expert testimony on digital technology, customary maintenance, and billboard “speech” at a tax trial in Baltimore, MD. Throughout the year, OAAA explained the impact of the 2015 Supreme Court decision in [Reed v. Town of Gilbert](#) and provided specific assistance in Gulfport, MS; Grand Junction, CO; and Denver, CO.

“No one has contributed more to the betterment of our industry than OAAA. You are always there to lead and guide through tough times when it came to ordinances, legislation, and overall advice.”

Scott Butterfield
Lamar Advertising Company

In Montana, OAAA helped members and the FHWA defeat two adverse special exemption bills in the Legislature and assisted to overturn a DOT regulatory ban on bus shelter ads.

“OAAA is a great asset, advocate, and resource to the industry.”

Craig Brinster
OUTFRONT Media

OAAA assisted members on vegetation control measures in Delaware, New Jersey, and Texas, and helped to obtain legislation in South Carolina to allow rebuilding of nonconforming billboards when signs are vandalized.

In May, OAAA and member companies presented to state regulators at the National Alliance of Highway Beautification Agencies (NAHBA) annual conference in Indianapolis, IN. Later that month, OAAA coordinated presentations by state outdoor advertising association leaders at the 2017 OAAA/Geopath National Convention + Expo in New Orleans, LA.

“My sincerest thanks to OAAA for expertise and testimony. It means a lot when the industry circles the wagons to support our own. We are very appreciative of all that each of you does to keep the world safe for billboards!”

John Siegenthaler
Lind Media Company

Serving Members

OAAA fulfilled more than 400 requests for legislative/regulatory information and research. Local managers from Pocatello, UT, to Gulfport, MS, say these resources helped avert problems and strengthen protections.

OAAA coordinated a webinar on billboard tax appraisal/valuation with the International Association of Assessing Officials (IAAO) featuring industry valuation and tax experts.

Member companies participated in a successful effort to preserve advertising deductibility as Congress approved tax reform in December.

As an industry advocate, OAAA publicly spotlighted members’ accomplishments in [environmental progress](#), [global exports](#), [emergency messaging](#), [safety](#), and [supporting transit](#) (for more, see the Communications report on Page 10).

Seven OAAA Legal Reports analyzed progress and challenges, while OAAA’s legislative team hosted or co-hosted webinars on industry trends, structures, appraisal, workplace safety, and a four-part billboard education series.

Marketing Report

In 2017, OAAA was the voice of a united industry in showcasing the medium's capabilities with compelling research and educational programs.

Speaking on Behalf of the Industry

OAAA was on the road again in 2017, presenting to 75 planning agency groups in 16 markets. Since the roadshow program began in 2013, OAAA has visited agencies in the top 50 DMA markets.

OAAA represented the OOH industry as a speaker or panelist at several key industry events including the Interactive Advertising Bureau (IAB) DOOH event, Advertising Research Foundation (ARF) DOOH Summit, Digital Signage Federation (DSF) Coffee and Controversy, DailyDOOH Investor's Conference, Advertising Week, and at four state OOH association meetings.

OAAA's Nancy Fletcher and Chairman Sean Reilly addressed attendees of the [58th FEPE Congress](#) in Stockholm, Sweden in June. They explained how the US OOH industry united to create a positioning strategy – one that is consistent with international industry priorities, proving OOH commonalities across the globe.



CEOs of @YourOAAA & @LamarOOH share their story of collaboration and how they work together to benefit #OOH medium in the USA #FEPE17

5:21 AM - Jun 8, 2017

8 retweets 14 likes

Advertiser and Agency Roadshow

Albuquerque/ Santa Fe	McKee Wallwork, 3Advertising, Ad House Advertising, Media Matched, K2MD
Binghamton	Ad Elements LLC, Riger Advertising, Rosanne Sall Advertising
Birmingham	Lewis, Style, Intermark, Big Communications
Boston	PGR Media, CTP
Buffalo	Crowley Webb, Eric Mower + Associates, Gelia Media, Fifteen, The Martin Group, Mr. Smith Agency
Chicago	Cramer Krasselt
Columbus	Matrix Media, Ron Foth, McGann Media, The Shipyard
Las Vegas	Outdoor Solutions, R&R, SK+G, Caesar's Entertainment, BrainTrust
Minneapolis	Haworth, Cuneo, Nemer Fieger, Linnihan Foy, True Media, Prime, Clarity Coverdale Fury
New Orleans	Peter Mayer, Hoffman Miller, Velocity, Total Media, Everett Bonner, Deveney, Buisson Creative, Morgan & Company
New York	AdCity (Havas), Project X
Norfolk/Virginia Beach	Free Agents Marketing, The Davis Agency, The Primm Company, Meridian
Providence	Nail, (add)ventures
Raleigh-Durham- Chapel Hill	McKinney, Intrepid, Heart+Hammer, The Stone Agency, Jennings
Richmond	The Martin Agency, Spurrier Group, Barber Martin
Salt Lake City	Fuel, Fluid, ThomasArts, Love Communications, Penna Powers, Rumor, Summit Group
Scranton	DSA, MLB Advertising, Sweda, Lavelle Strategy Group, Condron

Fletcher also attended the three-day Independent Billboard Operators' Conference (IBOUSA) in St. Louis, MO, in September, where she presented on shared industry interests, including advancing technology, defending property rights, and increasing sales.

Work began on a new industry ad campaign set to launch in 2018. The campaign will center around the industry's key positioning statement that recognizes OOH is creatively impactful, contextually relevant, and a media amplifier. Several prominent creative agencies were invited to submit campaign ideas, and final campaign selection is scheduled for early 2018. The new campaign follows the successful *Feel the Real* campaign, which won a Bronze Effie Award in 2017.



OAAA's *Feel the Real* campaign won a Bronze Effie Award.

The forthcoming ad campaign is part of a broader OOH industry positioning strategy launched in 2016 that identifies how to make OOH more of a core media buy. Implementation of the positioning initiative continued in 2017 and included a suite of new [marketing videos](#) and the relaunch of an enhanced [OOH Resource App](#).

Proving Value

OAAA produced an unprecedented number of new marketing research studies last year. Nielsen was commissioned to complete several important reports, including a 10-market

study demonstrating the [value of posters](#). The study found younger adults, in particular, notice posters, and over half of all consumers agree posters stand-out more than ads seen in newspapers, online, on mobile devices, or heard on the radio.

"This poster study is great, and the information we now have to share is priceless."

Eric Sankovsky
Adams Outdoor Advertising

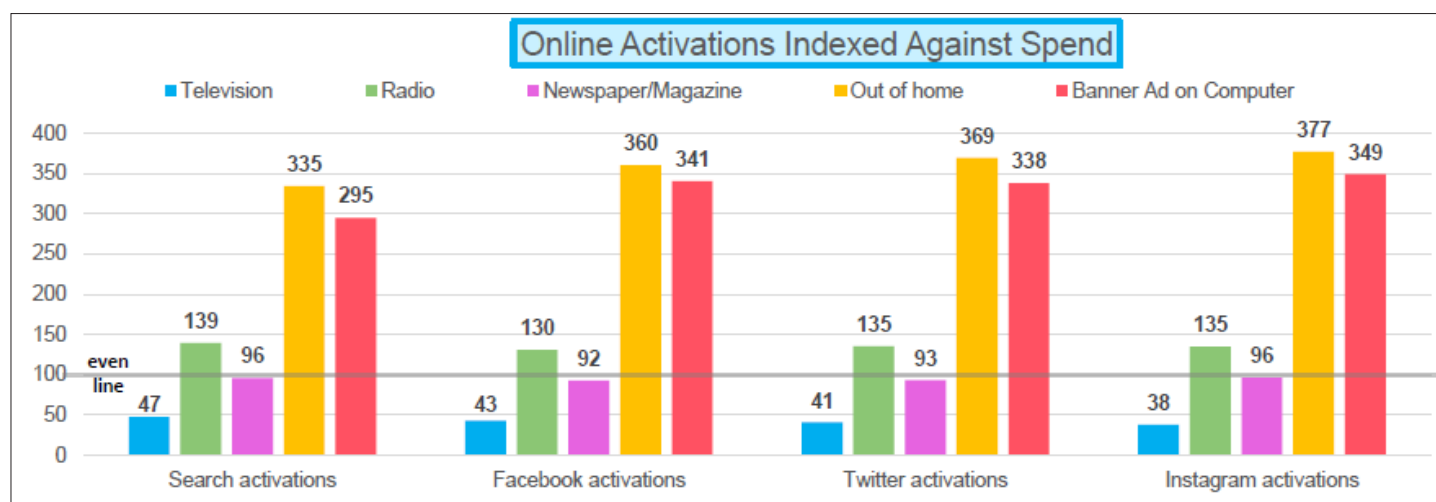
Nielsen also completed an [OOH and Online Activation Study](#). According to the study, online activations (search, Facebook, Twitter, Instagram) generated by OOH advertising indexes at over three times the expected rate given its relative ad spend. OOH outperformed TV, radio, print, and online banner ads.

OAAA produced two important white papers related to innovation and technology. The first report examined the future of OOH advertising in a self-driving America, exploring the opportunities related to [autonomous vehicle technology](#). The second, to be released in January, focused more broadly on understanding smart cities and the potential role of OOH advertising.

An extensive [ROI benchmarking study](#) was completed last year that showed for every dollar spent on OOH advertising, a brand could expect an average return of \$5.97. The report, conducted by Omnicom Media Group's Benchmarking, found when OOH is incorporated into the media mix, it improves overall campaign revenue ROI. OOH increases the effectiveness of digital search by 40 percent and print by 14 percent. The study shows how increases in OOH spend in every brand category analyzed ensures optimal campaign ROI.

"Clients always want ROI info, and it is at times tough to give them concrete answers beyond anecdotal examples. This new study is very helpful."

Scott Warren
Scallen



Results from the 2017 OOH and Online Activation Study

OAAA retained Sequent Partners to study marketing mix modeling practices to better understand how OOH media is represented in Return of Investment (ROI) models and why the medium is sometimes disadvantaged in model evaluations. Resulting from the analysis, an ROI workshop was developed for OOH media account executives and specialists. Four presentation modules and video tutorials will be available in 2018.

After several years of development, average planning rates were incorporated into SQAD for the top 100 DMA markets. The information is available to SQAD subscribers, which include many planning agencies. Planning rate data is available for Geopath audited OOH formats.

PRODUCTS & DATA **SQAD** ADVERTISING RESEARCH ANALYTICS & PLANNING

MediaCosts: Local

This is a friendly notification about the upcoming data release schedule for October 2017. Each data set has a slightly different release schedule, so refer to the list below for the upcoming data release windows.

Local TV AVAILABLE NOW!	Local Cable Oct 5th - 11th	Local Radio October 18th - 23rd
Local Out-of-Home Oct. 31st - Nov. 10th	Local Hispanic TV Oct. 11th - 16th	

OOH planning rates now available in SQAD

Educating and Rewarding

In May, more than 1,000 participants attended the 2017 OAAA\Geopath National Convention + Expo in New Orleans, LA, co-chaired by Kevin Gleason, Adams + Fairway Outdoor, and David Krupp, Kinetic North America. With the theme *Look Out*, the event provided opportunities to explore the latest in OOH trends and celebrate creative excellence.



Kinetic USA
@KineticUSA

#technology & #data paired with #storytelling & #creative is why #OOH is having a renaissance moment! #lookout2017 #contexthacker

9:18 AM - May 16, 2017

17 29

"Our team was amazed at how informative each of the sessions were, the dynamic speakers, and the overall message of #LookOut2017. If folks aren't inspired by the waves our industry is making, then I don't know what will inspire them!"

Marc Macias
All Over Media

Top business and advertising professionals inspired and informed the audience, including a keynote from Zenith Media's EVP and Global Head of Innovation, Tom Goodwin. National Geographic's Joel Sartore was the highest rated speaker. He inspired attendees to participate in the industry's national Photo Ark public service campaign. (Read more in the Public Service Report on page 11). OAAA's Nancy Fletcher delivered her 26th State of the Industry, which was also highly rated among attendees. Other notable speakers included Joel Lunenfeld, VP of Global Brand Strategy for Twitter; NFL's Chief Marketing Officer Dawn Hudson; and Rob Dembitz, Director of Cannes Lions.

"#LookOut2017 was an eye opening experience, and I feel that I gained valuable insight into the OOH industry that will help our company make smarter and more effective decisions with our OOH advertising this coming tax season."

Chad Iden
Capital Tax Management

Afternoon sessions included an innovations panel with representatives from WAZE, Corning Glass, Panasonic, FourSquare, NEC, and Spyder, each of whom discussed disruptive technologies transforming the media business. The hard-cover book *OPEN3* was distributed to attendees. This creative design book was a cooperative venture between OAAA and four other global OOH trade groups.

The 75th OBIE Awards were celebrated in New Orleans, LA, with a Platinum Award presented to Twitter. Seven Gold OBIE Awards were presented along with 10 Silver and 26 Bronze OBIE Awards. The 2017 OBIE Hall of Fame Award was presented to Warner Bros. Studio. Four new OBIE Craft Awards were also presented.



Twitter won the 2017 OBIE Platinum Award



To commemorate the 75th anniversary of the OBIEs, three popular hosts were invited back to present the awards: Andy Azula from the Martin Agency, Paul Levoie from TAXI, and Steffan Postaer from JUMBOshrimp. Attendees were treated to a riverboat ride up the Mississippi River to Mardi Gras World where the ceremony took place. The show was followed by a festive party in the Mardi Gras World float den, which included a full Mardi Gras parade.

The Industry Awards were presented to long-serving members of the OOH community. The Myles Standish Distinguished Achievement Award of Excellence, the highest industry honor, was presented to Bill Reagan, chairman of Reagan Outdoor Advertising, for a career spanning 50 years. The L. Ray Vahue Marketing Award of Merit, the industry's top marketing award, was presented to Rick Robinson, chief operating officer and partner at Billups.

Industry Hall of Fame Awards were presented to Don Avjean, OUTFRONT Media; Paul Cook, Wolverine Sign Works; Greg McGrath, Clear Channel Outdoor; Patrick O'Donnell, YESCO Outdoor Media; and Debra Abdalian-Thompson, Cleveland Outdoor Advertising.

Also during the national convention, Clear Channel Outdoor won the Ad Council Crystal Bell Award, and Reagan Outdoor Advertising won the OAAA/Geopath Local Case Study Award

"The OBIE Awards were great. Excellent work and judges that know it when they see it. Well done!"

Tom Norton
Norton Outdoor

The OOH Media Plan Awards were presented in late November during the annual Advertising Club of New York OOH:NOW Conference. The OOH Media Plan of the Yea Award was presented to Rapport and UM for *The Emoji Movie*.

"Thank you for your generous invitation to attend the OAAA National Convention. Time spent learning and networking with your members was very valuable."

Loren Chylla
The Adcom Group

The Ratings-Driven Media Plan Award went to Clear Channel Outdoor, Sony Interactive Entertainment America, and Kinetic Worldwide for PlayStation. Additionally, four Gold Media Plan Awards were presented along with six Silver awards.

Serving Members

OAAA unveiled a new online [OOH Tech Hub](#), where information about innovation and technology in OOH is curated for easy access.

In the fall, [OAAAedu](#) was launched, a new central source for training and career development resources.

The marketing team serviced more than 500 member and advertiser requests in 2017, ranging from competitive data analytics to customized demographic reports. Nine marketing webinars were presented to members.



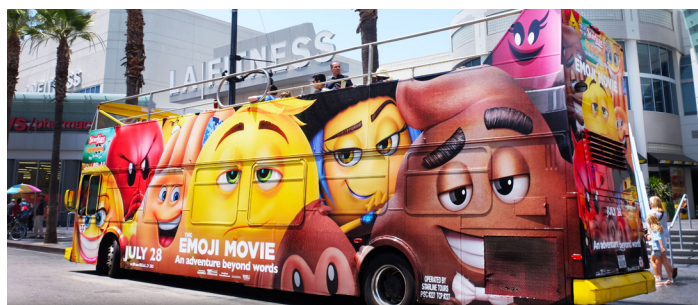
Nancy Fletcher and Sean Reily (right) present Bill Reagan with the Myles Standish Distinguished Achievement Award of Excellence.



Stephen Freitas (left) and Don Allman (right) present Rick Robinson with the L. Ray Vahue Marketing Award of Merit.

"We all enjoy a robust business in part as a result of your tireless dedication."

Rick Robinson
Billups



The 2017 OOH Media Plan of the Yea Award was presented to Rapport and UM for *The Emoji Movie*.

Membership Report

In 2017, OAAA was the voice of a united industry in its service to members.

Growing Membership

OAAA members remain pleased with the association's value and level of service, with 98 percent renewing membership in 2017. OAAA put an increased emphasis on membership recruitment, seeking both new members and reaching out to former members. The association welcomed 62 new members in 2017.

Member Type	Total
General	415
Street Furniture, Transit, and Place-Based	100
Supplier (Tech and Manufacturing)	88
Attorney	35
Financial	9
Advertiser	75
Affiliate	29
International	71
Total Members	822

Enhancing Digital Resources

In 2017, OAAA launched renovation of the OAAA website to streamline the user experience.

The popular [OOH Creative Testing Tool](#) was relaunched with new functionality and an expansion of available formats and scenes. The online resource has had more than 37,000 uses and features 35 unique OOH formats in multiple environments for a total of 80 different combinations.

OAAA's [OOH Media Locator](#) has had more than 26,000 online uses.

The [OOH Resource App](#) was rebuilt to enhance user functionality. It is currently used by more than 1,000 OOH industry account executives.

"I use the OOH app on a regular basis when talking to customers. And, although we are a small company, it's very beneficial to us when dealing with agencies to say we are members of OAAA."

Sarah Sang
RocketVII Interactive

Online Education

OAAA hosted 25 [members-only webinars](#) in 2017. In addition to standard informational webinars, three new series were introduced to feature OOH tech companies, spotlight supplier members, and educate billboard professionals. All webinar series will continue in 2018.

2017 OAAA Webinars

1. OOH Trends in 2017
2. OAAA Resources for Independent OOH Companies
3. Intro to SQAD – OOH Planning Rates for Agencies
4. Awareness, Attitudes Toward Roadside Posters
5. OAAA Biennial Membership Meeting and Convention Recap
6. OOH Online Activation and Other Valuable Proof Points
7. OOH ROI and Optimization in the Media Mix

OAAA Educational Webinars

This webinar series offers intensive training designed to prepare participants for all elements of the billboard industry. Industry experts provided insights, resources, and tools to address challenges billboard operators face daily.

1. How to Boost Local Sales
2. How to Improve Local Campaigns with Better Creative
3. OSHA Climber Safety Requirements
4. Structure Inspection & Maintenance

OOH Tech Webinars

This webinar series educates OAAA members about innovative opportunities and services. Participants discovered how technology is used to enhance OOH operations and campaigns and heard real-life examples of tech in action.

- | | |
|----------------|--------------------|
| 1. SITO Mobile | 7. BroadSign |
| 2. AdMobilize | 8. Blip Billboards |
| 3. Fliphound | 9. Vista Media |
| 4. DOmedia | 10. Pinsight Media |
| 5. xAd | 11. GroundTruth |
| 6. Dot2Dot | |

OOH Supplier Webinars

This webinar series spotlights OAAA supplier members, informing participants about the latest in supplier innovations, including new products and services.

1. SignValue – Appraisals for Condemnation or Financing

Communications Report

In 2017, OAAA was the voice of a united industry in communicating the power of OOH across multiple audiences.

Communicating Externally

Throughout the year, OAAA monitored more than 3,500 industry news stories; connected with more than 2,000 national, international, and trade press on behalf of the industry; issued 42 press releases; and assisted member companies in responses to the press with strategic talking points and media interviews.

OAAA ensured the industry received a significant amount of positive press, locally and nationally, proactively promoting stories focused on innovative OOH advertising solutions, harnessing the power of digital data, trends on the convergence of OOH with social and mobile technology and its relationship to connected cities, OOH's dedication to public service, vital industry partnerships, and healthy industry growth.

"Thank you for your support and sharing of our content efforts. We've made a strong internal commitment this year to evangelize for the media. Having an influencer such as you sharing those efforts is a great help, and only reinforces our resolve to keep beating the drum."

Matt Noll
EMC Outdoor

OAAA worked with *Billboard Insider*, an online channel for OOH news and analysis, to reach the OOH community with breaking news and industry insights. Including profiles on OAAA senior staff members, OAAA contributed 105 articles for a total of 25,000+ page views.

Eight OAAA guest articles were posted to the Advertising Week AW360 blog and *HuffPost*.

The communications team lent vital support to the National Geographic Photo Ark #SaveTogether public service campaign, providing social media strategy and press outreach. The campaign earned features in [USA Today](#), [Ad Age Creativity](#), [The Drum](#), [HuffPost](#), [MarTech Today](#), and on the [National Geographic blog](#). Following launch of the campaign in Times Square on May 19, OAAA worked with National Geographic to produce a [launch highlight video](#), which received nearly 3,000 views.

OAAA worked with the FBI to communicate the celebration of its 10-year partnership, earning prominent placement on [Officer.com](#), a [syndicated radio program](#), and the [FBI blog](#). OAAA interviewed a top-ranking FBI official to produce a [video testimonial](#) of the successful partnership.

"I genuinely believe OOH is the best advertising investment for most types of businesses, so keep doing all the great things you're doing to help us make the case."

Kathy Crowley
Lamar Advertising Company

Communicating Internally

Members continue to receive communications about OAAA, upcoming events, available tools, and industry trends via OAAA's weekly [Outlook newsletter](#). Weekly, sales professionals receive a Sales Tip e-mail providing the latest news and numbers to help sell to specific industries and markets.

Industry leaders contributed 44 posts to the [OAAA Thought Leadership blog](#), each offering insights or predictions about where OOH is heading. OAAA leaders published 43 posts to the [Special Reports blog](#), a platform used to share association news and reports. The blogs together earned more than 43,000 views.

OAAA continued to enhance its strategic social media practices in 2017, connecting with members, media, and the general public via Facebook, Instagram, LinkedIn, Pinterest, and Twitter. More than 3,131 people have "liked" OAAA's Facebook page, where they follow industry and association news and trends. More than 4,266 people follow Nancy Fletcher on Twitter, and 4,770 follow OAAA. Fletcher's tweets are also pushed to her more than 10,553 LinkedIn contacts. The OAAA LinkedIn group now has 1,837 members.



Public Service Report

In 2017, OAAA was the voice of a united industry in serving and protecting communities, donating more than \$500 million in media space.

Serving Communities

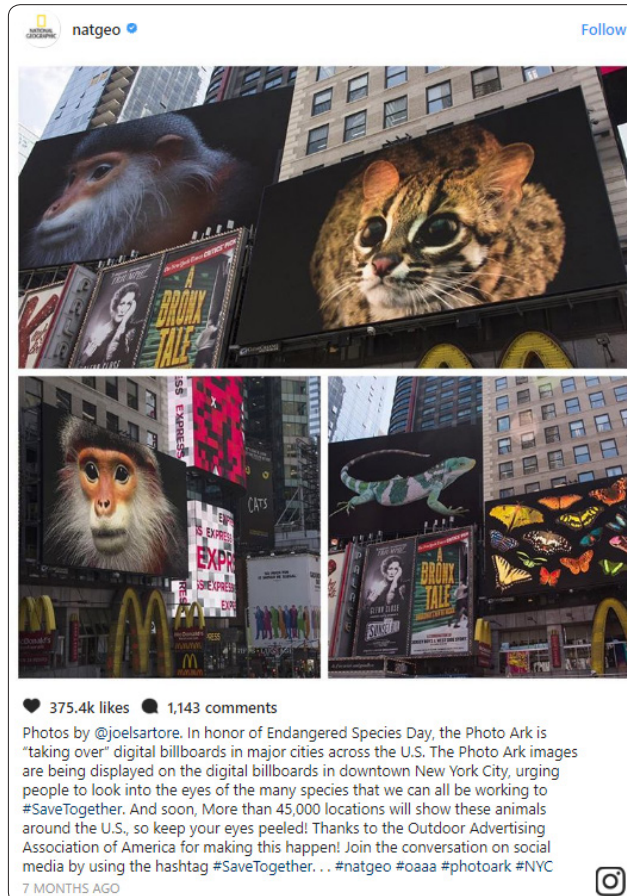
OAAA continues to support Ad Council campaigns and inform members when new OOH inventory is available. In April, OAAA worked with the Ad Council to launch an OOH roadblock to support NHTSA's Seat Belt Safety campaign. In three days, \$100,000 worth of printed inventory was claimed by OOH media companies.

OAAA assisted long-time public service partner The Boys and Girls Clubs of America in honoring the group's Youths of the Year. Congratulatory messages were featured on digital billboards in the hometowns of regional and national winners.

On May 19, Endangered Species Day, OAAA and the National Geographic Society launched the Photo Ark #SaveTogether OOH public service campaign following two soft launches in combination with Photo Ark gallery exhibits at zoos in Omaha and Dallas. The official launch took place in Times Square with a one-hour digital takeover of several signs. National Geographic conducted a street-activation to engage Times Square revelers, and a reception with National Geographic stakeholders was held following the launch. The launch expanded beyond New York as a national digital OOH roadblock. The launch event alone generated 425,000 OOH media impressions as the campaign was viewed on more than 72,000 OOH displays. Website views increased that day from a standard 300 to 18,000 – the largest number ever recorded on the site.

"OAAA is always the first group to ask if we need support. Thank you for everything you do for us."

Adriane Hayes
The America Red Cross



One America Appeal

The campaign rolled out across the US over the summer with printed inventory, concluding after Labor Day. The OOH campaign generated more than 4.3 billion OOH media impressions. Press coverage produced more than 3 million impressions.

An engaging component of the campaign invited people to take a selfie with one of the animal images featured in the OOH creative and then sharing it on social media using #SaveTogether. More than 10,000 direct mentions were posted using #SaveTogether, which reached more than 600 million users.

Following a summer of devastating hurricanes, OAAA worked with the Federal Emergency Management Agency (FEMA) and the Red Cross to quickly support relief efforts. The industry also supported the One America Appeal campaign, an effort in which all five living former presidents came together to help collect donations for those affected by hurricanes. Campaign creative was posted to digital OOH across the country.

Serving Law Enforcement

The FBI remains a strong industry partner of 10 years in its use of digital billboards to locate wanted criminals. Each time a new addition was added to the FBI's Top

10 Most Wanted list, the OOH industry supported the search with digital OOH. According to the FBI, digital OOH publicity is responsible for the apprehension of 57 fugitives in 10 years.

OAAA continues to transmit AMBER Alert activations provided by the National Center for Missing & Exploited Children (NCMEC) to digital billboards across the country. Since the program was implemented in June 2008, more than 1,700 AMBER Alerts have been posted to digital billboards in the US. OAAA was presented with a plaque from NCMEC to honor 10 years of partnership.

Operations & Technology Report

In 2017, OAAA was the voice of a united OOH Industry to improve and enhance safety of operations and technologies.

Guiding Safety and Operations

A voice for safety, OAAA represented the industry as the US Department of Labor updated rules affecting billboard climbers. Working with congressional allies, OAAA convinced the federal

labor agency to promptly clarify complicated new workplace rules so the industry could comply and continue its strong safety record. OAAA's on-going education efforts included a no-fee webinar on November 29, featuring safety experts at Formetco, Lamar Advertising Company, and Meadow Outdoor Advertising.

Operating Digital Billboards

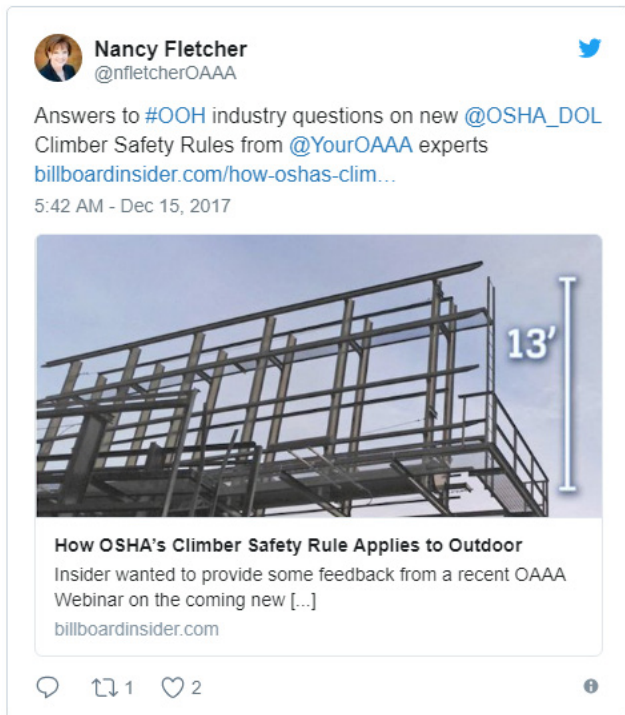
Reflecting OAAA's expansion into video as a means of advocacy and education, OAAA produced a [video explaining how to measure digital billboard light levels](#). The video was prompted by requests from state and local officials to ensure that digital billboards are compatible with OAAA lighting guidelines of 0.3 footcandles above ambient light.

"The new digital billboard lighting measurement video is great. Home run!"

Jeremy Johnson
Daktronics

The video showed the practical steps for regulators to take for accurate lighting measurements, along with a check-list for regulators to use in the field. The first audience for this new video was state and federal regulators at the NAHBA conference in May.

OAAA surveyed OOH industry members in June to update semi-annual statistics. As of mid-2017, OAAA estimates there are 7,300 digital billboard displays in the US.



FOARE Report

In 2017, OAAA was the voice of a united industry in promoting education and research initiatives critical to OOH.

Providing Scholarships

In 2017, the Foundation for Outdoor Advertising Research and Education (FOARE) selected 10 students to receive scholarships for the 2017-2018 academic year. The FOARE Scholarship Program supports the education and career goals of those who are part of the OOH advertising industry family, along with other students pursuing a course of study related to the industry. Since the program was established in 2001, 136 students have received FOARE scholarships.



The recipients for the 2017-2018 academic year:

Braden Saunders (Clinton, UT) received the \$5,000 Allman Family Business Development,

Marketing, and Sales Scholarship, established by Don and Cathy Allman. This scholarship recognizes the important link between sales, marketing, and business development. Braden is seeking an MBA from the Western Governors University in Salt Lake City, UT. His grandfather founded Saunders Outdoor Advertising in Ogden, UT, where his father also now works. Braden has worked at YESCO Outdoor Media as a market development specialist.

Carly Suter (Portland, OR) received the \$4,500 Ruth Segal Scholarship, which was established to recognize the work of Ruth Segal, a long-time employee of OAAA who worked tirelessly to educate federal and state policy makers about the industry. Carly is a freshman at the California Polytechnic State University in San Luis Obispo, CA. Carly's mother has been an OOH media buyer for 27 years.





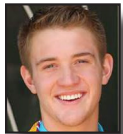
Kathryn Zelechowski (Glen Carbon, IL) received the \$4,000 Vern and Elaine Clark Outdoor Advertising Industry "Champion" Scholarship, which recognizes a student who demonstrates through their academic life, community activities, and career goals the skills

that made Vern Clark, a long-time industry champion, successful in his efforts. Kathryn is a junior at the University of Illinois in Urbana, IL, studying Agricultural Leadership Education. Her mother works as an administrative assistant at DDI Media in St. Louis, MO.

Vaidehi Merchant (Westland, MI) received the \$3,000 Creative Arts/Design Scholarship. Vaidehi attends the University of Michigan School of Information in Ann Arbor, MI, studying for a Master's Degree in Human Computer Interaction. She has been working as a graphic designer at OUTFRONT Media for the last six years. Her work in the industry has prompted her industry in creating digital interactive OOH.

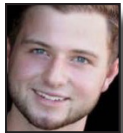


Other recipients (\$3,000) are:



Alexander Alwin (Phoenix, AZ) is a senior at the University of Arizona in Tucson, AZ, studying Management Information Systems and Finance. Alexander is the son of Tony Alwin, the current regional director for marketing for OUTFRONT Media.

Katherine Battaglia (Baltimore, MD) is a freshman at St. Joseph's University in Philadelphia, PA, studying Interdisciplinary Health. Katherine is the daughter of David Battaglia, a senior account executive for Clear Channel Outdoor.



Brenden Beshore (Yorktown, IN) is a freshman at the Indiana University Kelley School of Business in Bloomington, IN, studying Business Marketing. Brenden is the son of Brett Beshore, former president and general manager of Clear Channel Outdoor.

Aidan Dugan (Manlius, NY) is studying for an MBA at Tel Aviv University in Ramat Aviv, Israel. He is the son of William Dugan, the vice president and general manager at the Syracuse office of Park Outdoor Advertising.



Colin Mahoney (Hanover, MA) is a freshman at Skidmore College in Saratoga Springs, NY, studying Business. He is the son of John Mahoney, the business development manager for OUTFRONT Media.

"I saw the power of OOH through my mother's work and those she partnered with. I love how this medium can speak with such a loud and impactful voice to a specific market and create change."

Carly Suter
Scholarship Recipient

"I would like to bring the knowledge of digital interaction to the industry. I'd like to participate in the near future, as an important contributor, to an always changing industry of digital OOH media advertising."

Vaidehi Merchant
Scholarship Recipient

Royston Richards (Greenwood Village, CO) is a freshman at the University of Wisconsin in Madison, WI. Royston's father is president and part owner of Mile High Outdoor in Denver, CO.



Supporting Industry Efforts, Education

FOARE completed its five-year commitment supporting a fellowship program at Duke University and its outdoor advertising archives.

In 2017, FOARE provided financial support for the Photo Ark #SaveTogether public service project with National Geographic. The foundation supported the production of two industry white papers – one on autonomous vehicles (AV) and another on smart cities.

Other industry research initiatives include funding to send curricula materials to more than 400 university and college marketing and advertising professors.

Raising Funds

The 2017 Annual Fund campaign is underway with a completion date of January 31, 2018 (the end of FOARE's fiscal year). The goal is to raise \$175,000. Since FOARE was re-organized, more than \$2.4 million has been contributed to the industry's only not-for-profit organization dedicated to OOH research and education.

Family foundations have been generous in supporting FOARE and establishing education programs. The Fletcher Family Foundation, the Reagan Family Foundation, the Elaine & Vern Clark endowment, and the scholarship endowment by the Cathy & Don Allman Family Foundation have combined to donate over \$725,000 in endowed funds.

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