

## Advances in industry storytelling, creative impact, customer experience, and industry stewardship.

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2017 OAAA\Geopath National Convention + Expo

It's hard for me to believe, but this is the 25th year I've had the privilege to report on the State of the OOH Industry.

In the last 25 years, together we've seen many challenges and opportunities – and remarkable transformation. Today I'm proud to report that the OOH industry is in excellent shape.

- In 2016 industry revenue hit an all-time high of 7.6 billion dollars.
- OOH has grown in every one of the last 28 quarters.
- Every segment of the business was up in 2016 – digital and printed – billboards, street furniture, transit, and place-based OOH.
- One-quarter of the Top-100 OOH advertisers are now digital or tech brands like Google, Amazon, Facebook, and Apple.
- This year, OOH revenues will surpass magazines, and then overtake newspapers in 2019.

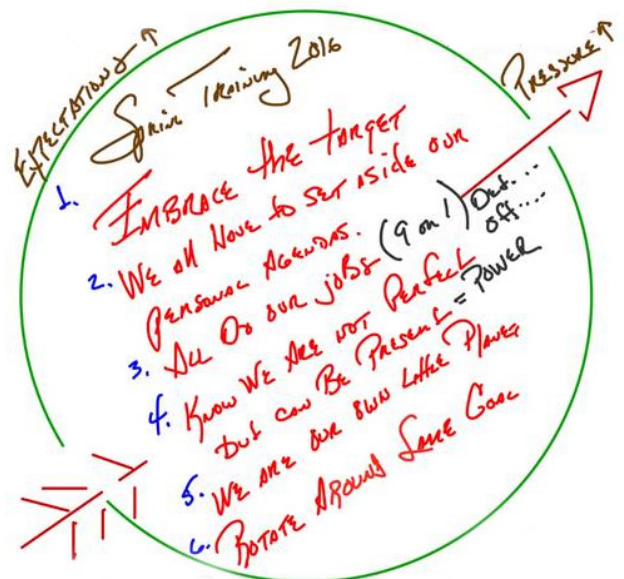
Of course, there are other non-financial ways to look at the health of OOH. In my view, most important is OOH's ability to adapt and grow in the midst of change.

Let's face it; our world is changing, often in surprising ways:

- With the United Kingdom leaving the European Union.
- A new, different kind of President here at home.
- And after 108 years, new champions of baseball.

I'm not the biggest sports fan in the room, but I've been fascinated by the management of the Chicago Cubs. The Cubs team president Theo Epstein was just named the World's Greatest Leader, by *Fortune* magazine. Wow. Bare in mind, the Pope was number three.

Cubs' manager Joe Maddon is also impressive. He always has an original and fun theme going into each season. Here you see a diagram Maddon drew on his iPad for his talk to the team on the first day of spring training last year. He summarized their goal in the three words at the top, "Embrace the target."



Maddon Target

Maddon wanted the team to embrace the pressure and go after the biggest target in baseball: the World Series championship.

How would you define our target? What is the OOH industry target?

Our convention co-chair, Kevin Gleason, has a terrific mission statement for Adams. I asked him if I could build on it and offer it to you as a unifying theme for our industry.

*What is our target?*

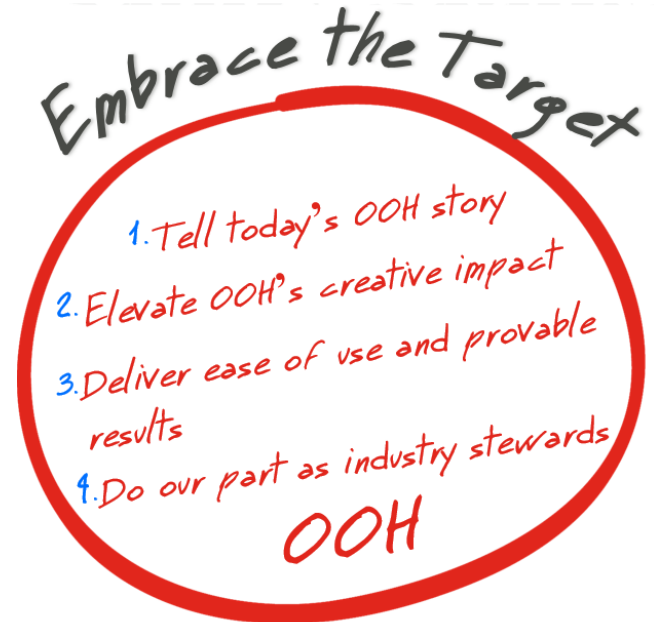
*To continue to transform the OOH medium,*

*To prove that OOH is more powerful and valuable than anyone has yet to imagine.*

That's a big, ambitious target: making OOH more powerful and valuable than anyone has yet to imagine.

As I report on the State of the Industry, I'll focus on four key pathways to our target.

- Tell today's OOH story
- Elevate OOH's creative impact
- Deliver ease of use and provable results
- And do our part as industry stewards



OOH Industry Target

I'm delighted there have been significant advances in all four areas.

## TELL TODAY'S OOH STORY

Let's start with the first priority: Tell today's OOH story.

**Position OOH as a Core Media Buy.** Last summer – in an extraordinary example of industry collaboration – [these competitors](#) came together to update the vision and positioning of OOH. There were lots of opinions, and some disagreements, but these industry leaders ultimately agreed on a single vision that positions OOH as a core media buy – alongside TV, digital, mobile, and social. They landed on eight attributes that define and differentiate OOH. Take a look at these attributes highlighted in the new [OOH value proposition video](#).

You can download the new [OOH positioning assets](#) – including the video – on the OAAA website.

Another way we're telling today's OOH story is through [industry-wide campaigns](#).

**Vote to Count Campaign.** During the last election, the industry's *Vote to Count* campaign did two things. It helped to increase voter registration – which exceeded 200 million for the first time in history – and it showed how OOH drives digital engagement. This award-winning campaign generated 12 million online interactions.

**Feel the Real Campaign.** Another award-winning campaign, *Feel the Real*, showed advertisers that real ads count. This 2015 industry campaign made the point that OOH ads, in the physical environment, are real, and can drive digital engagement unlike any other medium.

This February we breathed new life into the campaign after Marc Pritchard publicly spoke out against digital ad fraud and viewability.

Marc Pritchard is the Global Brand Officer for Procter & Gamble, the nation's and the world's biggest advertiser. This man doesn't mince words; he laid down the law regarding digital ad concerns.

Later this year, we'll start work on the next industry-wide marketing campaign that will break in 2018.



**Agency Road Shows.** OAAA is telling the OOH story directly to ad agencies: 330 in the last three years and another 100 planned this year. These road shows open doors, open conversations, and they open opportunities for OOH.

### ELEVATE OOH'S CREATIVE IMPACT

The second priority is to elevate OOH's creative impact.

Creative impact is ranked, consistently, as the number one reason advertisers buy OOH. Our convention co-chair, David Krupp, said it this way: "No other media mirrors OOH's physical size and capacity for delivering a creative message."

**More Investment in In-House Creative Talent & Training.** Great creative is magic. Great creative touches our hearts in ways our heads can't explain. And, if great creative is magic, then OOH creative designers are the magicians.

Some of you may not know that OOH media companies have been investing more in in-house creative talent and training. They realize how important it is to help advertisers make more impactful OOH ads, especially at the local level.

**Combine Innovative Technologies with Great Creative.** Another important realization is that, in our industry, innovation goes hand in glove with great creative. Look at all the recent technologies – facial recognition, dynamic content triggers, augmented reality – all of these are increasing the creative storytelling power of OOH.

**75TH OBIE Awards Recognizing Creative Excellence.** The OBIE Awards – now in their 75th year – showcase the best OOH creative. Tonight, at the OBIE show, you'll see new awards that shine a brighter light on the role of creativity and tradecraft in effective OOH.

**Creative Testing Tool.** Back in 2013, OAAA launched an online creative testing tool to help elevate OOH creative – and boy is it popular!

More than 30,000 creative executions have been run through the testing tool – to visualize what an OOH message will look like on the street.

Just last month, the [Creative Testing Tool](#) was expanded to 35 different OOH formats in multiple new environmental views.

**Open: New Book on Global OOH Campaign.** And today, as part of the plan to promote creative excellence, each of you will receive a limited edition copy of a new book that celebrates some of the world's most impactful OOH campaigns.

## DELIVER EASE OF USE AND PROVABLE RESULTS

Our third goal is best described in the clear English of an Englishman, spoken in a way everybody understands. At the OOH Positioning Committee meeting last summer, Jeremy Male of OUTFRONT Media said, “We need to take out the gunk in the buy-sell process, and then prove the value of OOH.”

The third industry priority, then, is to deliver ease of use and provable results. A lot has been happening in this area.

**Data + Automation + Programmatic.** OOH planning systems are integrating with data sources – mobile carrier data, online browsing behavior, shopper purchase records – all this, allows marketers to target more specific segments of audiences on the move.

Automation is helping to streamline transactions. When you visit the Expo this afternoon, you’ll see an array of solutions that help to simplify the exchange of data, others that make location information easily accessible, and still more that provide analytics with speed and accuracy.

When automation is linked with digital content, the logical next step is programmatic. Programmatic is matching specific messages to the right audience at the best times and locations. It’s a paradigm shift in the way we think about selling OOH inventory, but one that goes where advertising dollars and other media are heading.

**Geopath.** Something else important: Geopath is breaking new ground to compare OOH with other measured media. Just recently, Geopath introduced hourly audience impressions. This gives us quantifiable delivery of changes in audiences throughout the day.

**SQAD.** A long-running bone of contention in our business is that, unlike other media, OOH doesn’t appear on those desktop systems used by planners. Thankfully, that’s changing. Hundreds of ad agencies use a cost system provided by SQAD. As of last month, OOH planning rates are available for the top-100 markets on the SQAD desktop screens.

**OOH Buyer/Seller Task Force.** A year ago, we met in Boca Raton. You may remember an afternoon buyer/seller forum where there was a spirited, frank discussion about getting the gunk out of the selling process. Afterwards, thanks to that meeting, and the leadership of Andrea MacDonald of MacDonald Media, a buyer/seller task force was formed – with representatives from the 4As and the OAAA – and they’re finding ways to improve transactions and best practices.

On the proof side, a burst of [new research](#) is proving the power of OOH.

**Case Studies.** OAAA has on the website for your use, 300 recent and relevant [case studies](#).

**Benchmarking.** New independent research from the experts at [Benchmarking](#) is telling us that OOH generates one of the highest levels of return on investment – and that OOH when added to media plans – ignites online search.

**Sequent Partners.** Calculating return on investment can be complicated, and we’ve had questions about whether OOH is accurately represented in marketing mix models that determine ROI. OAAA has engaged Sequent Partners to help with this issue, and to educate OOH buyers and sellers about ROI.

**Nielsen.** Nielsen has completed new studies on [OOH effectiveness](#): on the [power of posters](#), on the [power of digital billboards](#), and on the overall ability of [OOH to drive online engagement](#).

## DO OUR PART AS INDUSTRY STEWARDS

We're making real progress on the first three building blocks, to:

- Tell today's OOH story
- Elevate OOH's creative impact, and
- Deliver ease of use and provable results.
- There's a fourth priority that's just as important – and that's to do our part as industry stewards.

I began my remarks by mentioning Cubs manager, Joe Maddon. I like Joe Maddon, for a lot of reasons, including the fact that I'm younger than he is!

As an older guy, Joe Maddon didn't want to get caught up in the past. He didn't want to get bogged down talking about the Cubs not winning a World Series since 1908. He'd say, he wasn't there, and neither were today's players or coaches.

Well, just like Joe, I don't want to live in the past; so, I'm not going to get caught up in the old legislative war stories. Many of the people in this room weren't in those battles. But every single one of us in this industry – whether you're older than Joe Maddon or younger than my friend Ian Dallimore – all of us should:

- Never take the ubiquity of the OOH platform for granted.
- We should remember that the highest-value OOH assets tend to be highly regulated.
- And we should understand that the big development opportunities tend to depend on the support of government or quasi-government entities, and ultimately, the public.

Young or old, big corporations or independents, we all are stewards; we all share the responsibility to protect the value and future of OOH. For example:

**Stewards of Privacy.** A year ago, an important friend of the advertising industry, Senator Chuck Schumer of New York, asked – during a press conference in Time Square – if new OOH targeting tools had crossed the line and invaded privacy. As stewards, we better have a good answer to that question, and we do. Yes, we benefit from data, which will help target our messages, but, as stewards, we also respect privacy. By updating our Code of Principles and joining with the broader advertising industry in self-regulation – we answered Senator Schumer's question to his satisfaction – and in the meantime, we strengthened our long relationship with the senator from New York.

**Stewards of Technology.** As an industry, we're embracing a host of digital technologies. We know that digital technology helps drive OOH revenue. So, we knew the stakes were high and we'd have to act as stewards of technology when an anti-billboard group sued in federal court to stop digital billboards. Now, they're trying to take their case all the way to the US Supreme Court. But, our side has won in every court, on every count. To date, OAAA has spent countless hours and \$1.3 million in legal fees defending digital billboards, and we're going to see this through to the very end.

**Stewards in a Self-Driving America.** Here's another timely topic: the prospect of driverless vehicles. Thank you, Tom Norton of Cincinnati, for reminding us to pay attention to this trend, to be stewards for our business. With the solid support of the industry's foundation, we [commissioned experts to study](#) the repercussions of autonomous vehicles. They tell us there are looming disruptive effects across many industries. They also tell us, the trend toward automation will come in increments, and the complete transformation to only driverless vehicles is a long way off. Which means we have the time we need to find our opportunities in this changing world, and time to adapt, as we always have to new technologies.

**Stewards of the Environment.** We're also stewards of the environment. Thank you, Chris Zukin of Meadow Outdoor, for telling our story on environmental progress in the [Huffington Post](#). The industry is upgrading lighting, it's recycling, re-purposing, exploring renewable energy, and buying cleaner equipment. When it comes to the environment, we have a good story to tell, and so, it makes sense that our displays promote environmental messages, for parks and conservation.



This is my favorite photo from our recent public service campaign to celebrate our national parks - a mobile billboard parked right in front of the Jefferson Memorial - and for that we thank Do It Outdoors.

If you like this image, wait till you hear from our next speaker about our upcoming campaign to help endangered species. It's going to launch this Friday in Times Square.

**Public Service Stewards.** Ten years ago, the FBI began using donated billboards on behalf of public safety, thanks to a partnership pioneered by Clear

Channel Outdoor. Last month, the FBI announced the 57th case that was resolved as a direct result of tips from digital billboards.

We are, indeed, excellent stewards. Thank you – to all of you – for providing more than \$500 million a year of free, valuable advertising for law enforcement, for the environment, for safety, for missing children, for the important efforts of the Ad Council, the Foundation for a Better Life's *Pass it On* campaign, and for thousands of local causes.

Yes, we're an important part of American life. We're part of the community, part of the economy, part of the culture, and we'll very much be a part of smart cities, smart transit, and the connected future.

We know our target: to continue to transform the OOH medium, to prove that OOH is more powerful and valuable than anyone has yet to imagine.

And we know how to get to our target:

- Tell today's OOH story
- Elevate OOH's creative impact
- Deliver ease of use and provable results
- And do our part as industry stewards

During the years I've been at OAAA, our industry has faced a range of unbelievably exciting opportunities. We've also faced some serious threats. But, in all that time, all of us working together have transformed this industry into the force it is today. As our convention co-chairs said in their opening remarks, OOH is not only standing, it's standing tall.

I thank you so much for all you've done.

We've had a brilliant last year, and we face an even brighter future – a future where the OOH medium is proven to be more powerful and valuable than anyone has yet to imagine.



Heads up: [@ArtPopStreetGal](#) is back with new artists' work on #OOH billboards [journalnow.com/news/local/hea...](http://journalnow.com/news/local/hea...) via [@JournalNow](#)

8:01 AM - 24 Apr 2017



**Heads up: ArtPop is back with new artists' work on billb...**  
For the second year, the Arts Council of Winston-Salem and Forsyth County is raising art to new heights while sprucing up [journalnow.com](http://journalnow.com)

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