



Out of Home Advertising Association of America

## Tracking Advertiser Attitudes, Perceptions & Intentions

### Executive Summary

To help the Out of Home Advertising Association of America (OAAA) learn more about marketers' attitudes and perceptions about out of home (OOH) advertising, OAAA requested an independent, objective assessment that would confirm or correct its current hypotheses. The evaluation focused on the current state of understanding about the OOH market today (including all technologically-driven capabilities).

Specifically, the goals were to:

- Examine the underlying understanding about OOH including how effectively marketers' needs are currently being met, how the industry is differentiated in their minds, how OOH fits into their strategic needs moving forward, and how OOH is perceived by brand and agency decision-makers.
- Assess how well OOH performs relative to brand and agency expectations including measurement analytics currently available as well as other important criteria.

OAAA identified 11 national brands and seven agencies from multiple markets for in-depth interviews. Interview prospects were selected based on: total advertising budget; product category diversity; and OOH spending levels (high, medium and low). Those interviewed were advertising decision-makers.

The three top takeaways on which the OOH industry should continue to focus:

1. OOH media companies providing transparent, relevant analytics about consumers, which will continue the expansion of the medium's appeal to a broader range of brand campaigns.
2. Providing consumer stories along with metrics. Marketers want to understand how OOH intersects with consumer lifestyles.
3. Ongoing adoption of unified standards and practices to further elevate the OOH industry.

While many marketers have been slowly shifting funds from traditional television, radio, and print, they are shifting most of their funds to cheaper digital alternatives—predominantly online as they try to mirror consumer behavior in ways that are relevant, cost effective and consistent with their brand messaging. However, OOH opportunities are proliferating and becoming increasingly dynamic, so many marketers are embracing OOH as more of a strategic asset today. This perceptual shift has helped fuel the OOH's 36 consecutive quarters of growth.

#### SUMMARY OF FINDINGS AND RECOMMENDATIONS

Many marketers express extremely positive feelings about OOH advertising both in terms of its relevance and its impact. In fact, they express their belief that the medium seems to be enjoying a renaissance of sorts. They pointed to several factors contributing to this mindset:

- A. OOH is perceived and valued as a great way to break-through the digital noise. Marketers recognize that consumers are increasingly vocal about reasserting their control over their exposure to advertising message interruptions. As more and more of their lives are lived in the digital universe, these intrusions are less and less welcome.

Brand/Agency comments included:

- “The only channel that is Always on”
- “Creates instant top of mind awareness.”

B. OOH creates opportunities for deeper customer relationships with brands.

Brand/Agency comments included:

- “Real one-to-one engagement.”
- “You reach people that are impossible to talk to otherwise.”

C. OOH is perceived able to ignite culturally relevant conversations and create lasting ‘buzz’ as well or better (and safer!) than any other medium.

Brand/Agency comments included:

- “It’s a real conversation starter that elicits action.”
- “OOH keeps us visible and part of the popular culture.”

D. More than ever, geo-targeting has never been more valued because it allows for localization without the concern about unwanted privacy invasion.

Brand/Agency comments:

- “As close to the sale as you can possibly be.”
- “Geo, hyper-specific localization.”

Rishad Tobaccowala, chief growth officer at Publicis Groupe, served as a consultant on the project and summarized these top four perceptions of OOH:

- OOH helps to break through the digital noise
- OOH creates opportunity for deeper customer-brand relationships
- OOH ignites culturally relevant conversations
- Geo-targeting is valued for localization without privacy concerns

“For OOH to continue its steady growth, the industry must understand how well the medium performs relative to brand and agency perspectives,” he said. “This analysis confirms OOH is an important component of today’s media mix. It is widely seen as an effective tool for launching new products, showcasing message creativity, and delivering high impact.”