



2018 OOH Media Conference Learnings + OBIE Awards

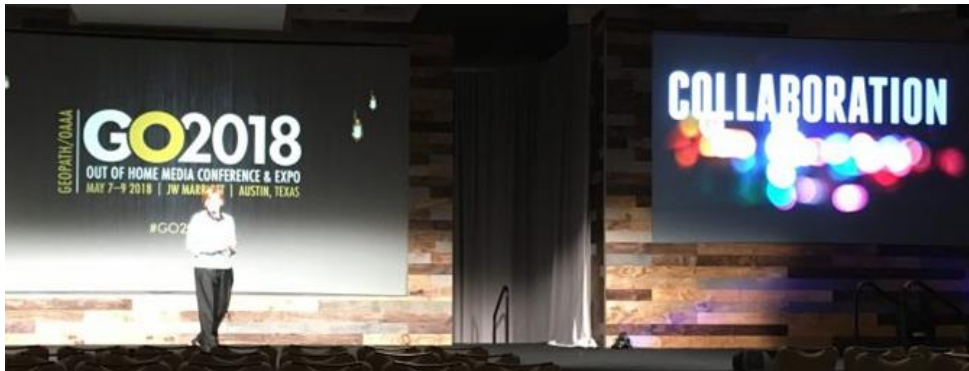
OOH National Conference Learnings



State of the

OOH Industry

A Call For More Collaboration



Nancy Fletcher OAAA President and CEO

OOH – Strong Success and Promising Growth

- All-time revenue high of \$7.7 billion
- 31 consecutive quarters of growth
- Almost ¼ of the Top 100 OOH advertisers are tech and digitally-native brands like Amazon, Apple, Google, Hulu, Lyft, Microsoft, and Netflix
- Technology, data and infrastructure are helping fuel OOH success



OOH – A Hero Sparking Social Conversations

“OOH has gone from stepsister to hero; it is the rising star of traditional media.”



A Disrupted Advertising Marketplace

- Digital media ad spend rose +17% in 2017 to 45% market share, according to MAGNA.
- OOH revenue is growing, but stuck at 4% share.
- Data analytics - transforming every corner of OOH.
- Potentially disruptive innovations - augmented reality, artificial intelligence, autonomous vehicles, and Smart Cities



OOH History - Proven Model of Vision, Unity, and Resolve

- Standardizing ad formats
- Developing measurement standards
- Protecting property rights
- Rolling out digital formats and defending digital billboards in court

Digital OOH Displays
1800 x 600 Pixel Ratio/3:1 Aspect Ratio
Large Bulletin
1400 x 400 Pixel Ratio/7:2 Aspect Ratio
Standard Bulletin
Junior Bulletin
840 x 840 Pixel Ratio/1:1 Aspect Ratio
Square Bulletin
840 x 400 Pixel Ratio/21:10 Aspect Ratio
Standard Poster
Junior Poster



Collaboration Within Our Industry

- OOH Positioning

- Tell OOH's unprecedented story in a unified voice to convince clients, existing and new, that OOH deserves a bigger piece of the media pie
- All members should be aligned with the OOH positioning

- New Ad Campaign

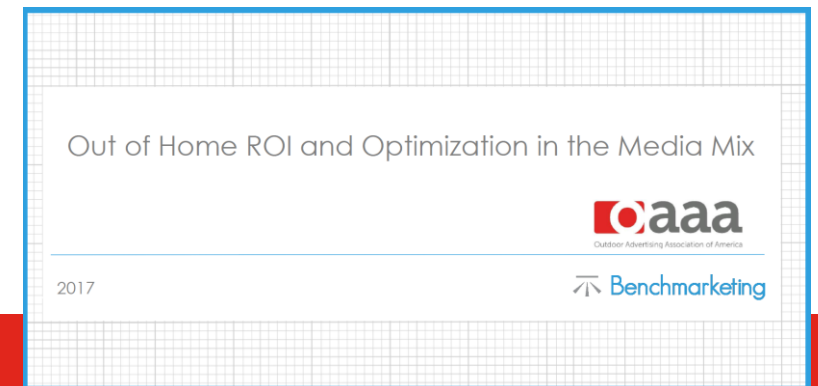
- Direct to advertisers and agencies just like 2015's successful "Feel the Real" campaign
- Continue the conversation about the role of OOH and how it complements digital
- Publicis New York – Agency of Record
- Member support is critical - resources, inventory and commitment



Collaboration Within Our Industry

OOH Research - industry resources/expertise to prove OOH effectiveness

- In 2017, published research studies demonstrating:
 - OOH ROI outranks most competitive media
 - OOH produces online activity better than all traditional media and banner ads
 - OOH posters are highly effective, drive engagement, and connect with young adults
- In 2018, publishing 2 new studies:
 - OOH deserves greater allocation across all product verticals/budget sizes (released in Austin)
 - Attribution analysis proving OOH drives consumer actions – both online and offline



Collaboration Within Our Industry

OOH Industry Groups

- Digital Signage Federation
- Digital Place-Based Advertising Association
- Geopath
- Interactive Advertising Bureau
- Independent Billboard Operators USA
- OAAA



Collaboration with Customers

- OOH Capabilities Agency Road Show – 400+ agencies, all top 50 DMAs
- Celebrating Creative – #1 reason brands use OOH
- Expanded OBIE Categories
- Creative Testing Tool – 48K uses



Collaboration with Communities

- Community collaboration drives perceptions and regulations
- Dependence on government permits/contracts to expand our footprint
- Historical unity has amplified OOH's voice far beyond one person or one company.



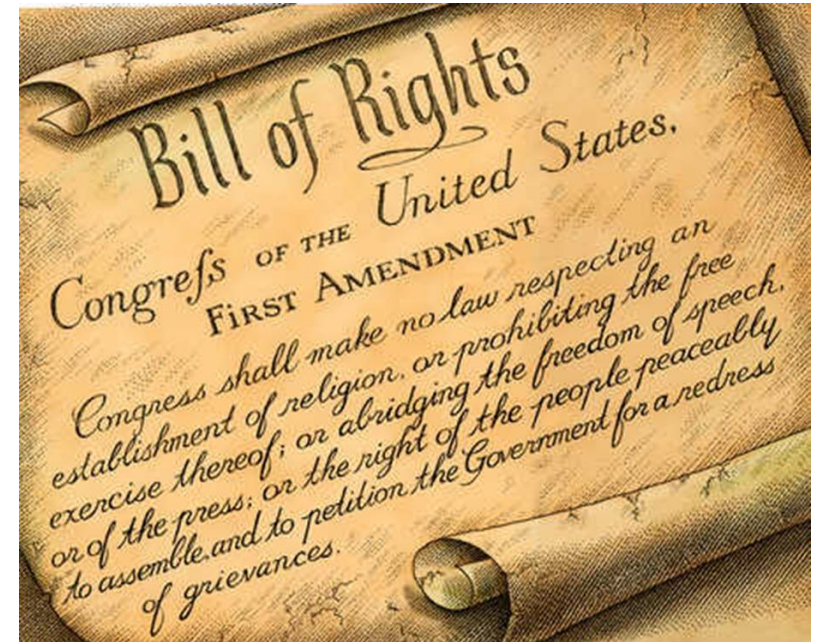
Collaboration with Communities

Legal Constitutional Challenge in Tennessee

“Whether a sign qualifies as on-premises turns primarily on its location, not the topic discussed or the idea or message expressed. As a result, it is content neutral.”

That proposition is supported by longstanding Supreme Court precedent predating Reed, and the vast majority of lower courts to have considered the issue after Reed have agreed.”

- Defendant’s Argument (OAAA Brief)



Collaboration with Communities

Government Support

- Government increasingly relies on OOH to support transit, build and maintain bus shelters, provide amenities such as free Wi-Fi and charging stations, and communicate with the public.



Collaboration with Communities

Connecting with Communities

- 2014 Art Everywhere US
- 2015 - 2016 National Parks Centennial
- 2017 National Geographic Society “Photo Ark”
- 2018 Winter Olympics



Increased Industry Collaboration – the Accelerant



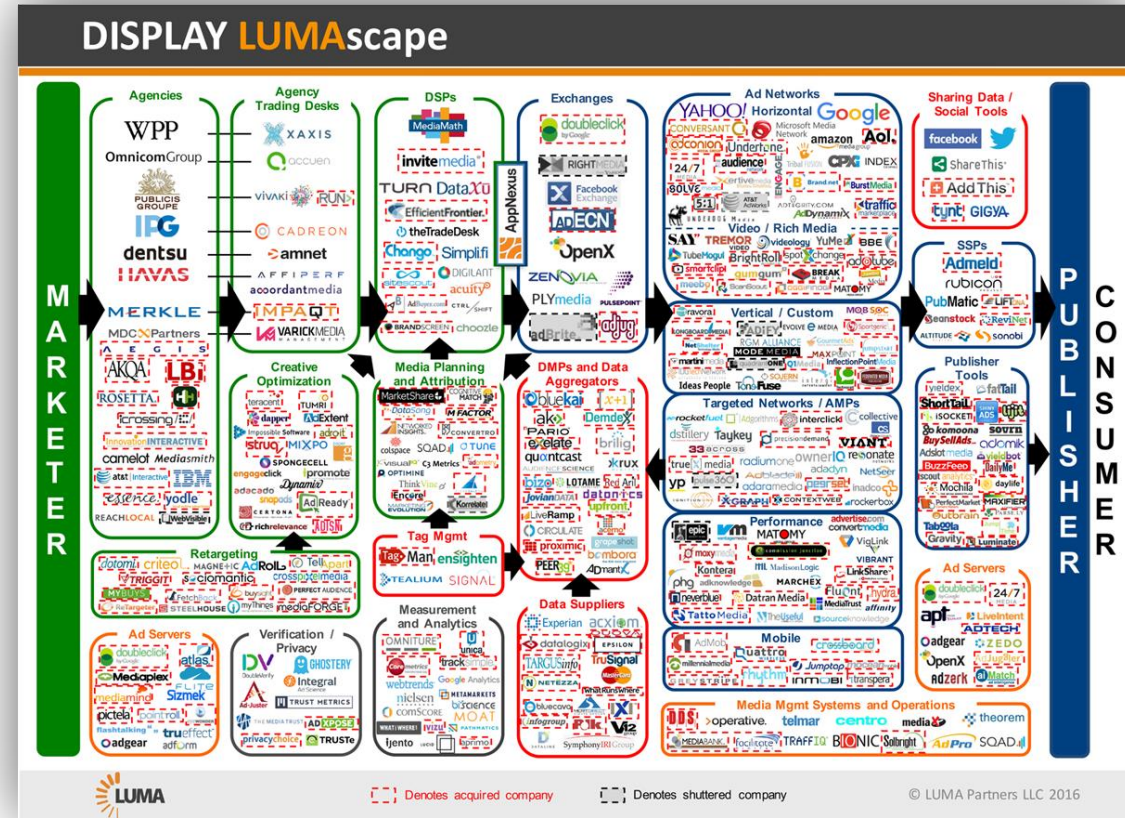
ANA: Advertising Growth - 12 Keys Areas of Focus

- #1 Brand & Creative Excellence
- #2 Talent
- #3 Marketing Organization Management
- #4 Measurement Data/Analytics Accountability
- #5 Brand Purpose
- #6 Gender Equality – bias damages ad effectiveness



ANA: Advertising Growth - 12 Keys Areas of Focus

- #7 Diversity – multicultural marketing inclusion
- #8 Media Supply Chain - LUMAscape
- #9 Transparency – media, programmatic, production
- #10 Brand Safety Ad Fraud
- #11 Advocacy



“Brands are the constancy that accelerate business growth.”

- Interbrand's Best Global Brands, October 2017

ANA: Advertising Growth - 12 Keys Areas of Focus

- #12 Future of Advertising, Marketing and Growth

The Six Pillars of Brand Activation:

- Experiential
- Relationship
- Promotion
- Retailer
- Influencer
- Content

**“Transform, innovate, and
drive growth.”**

Marc Pritchard - ANA chairman and chief brand officer, P&G

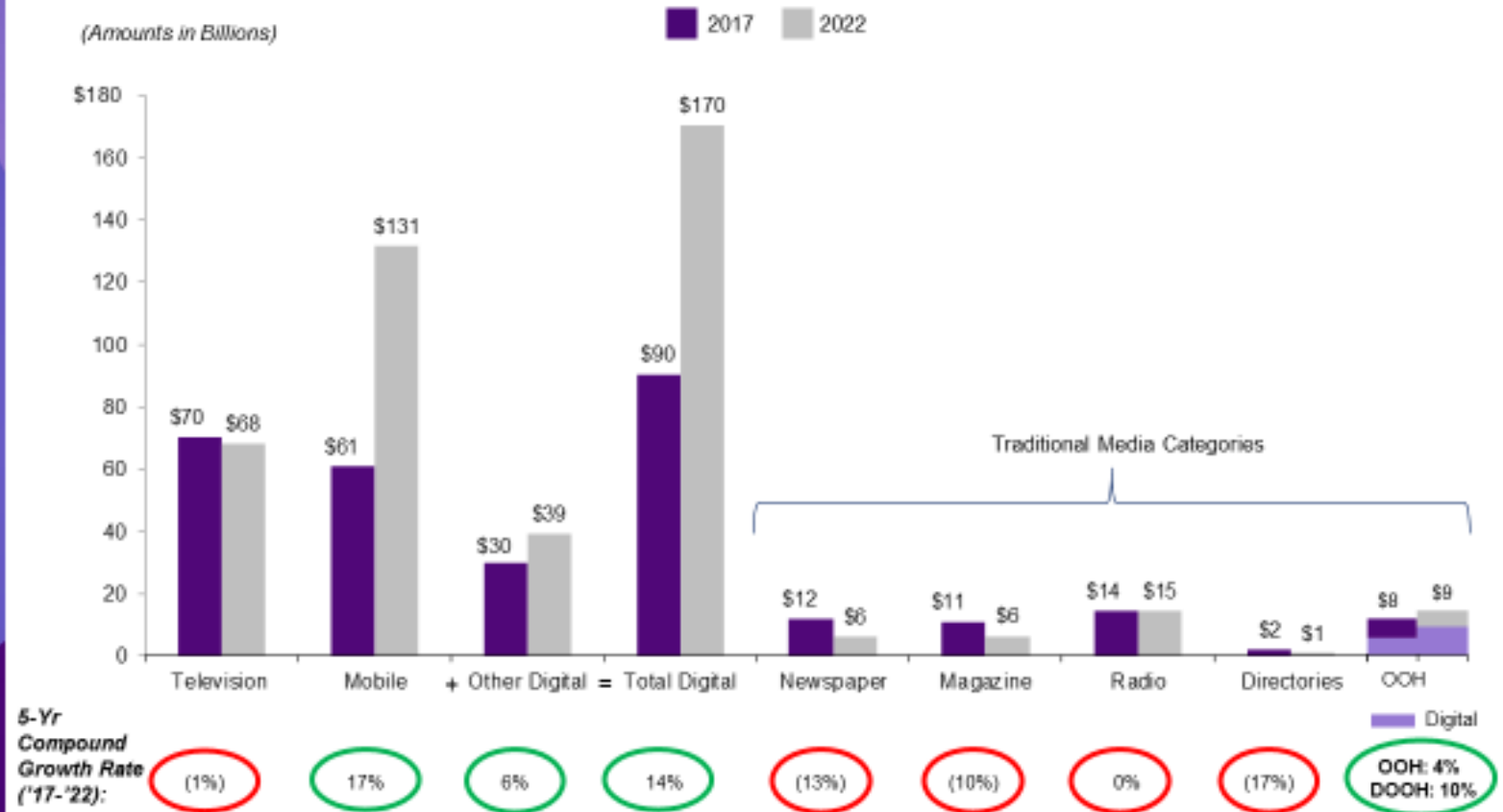


OOH and Overall Ad Revenue Trends



Mark Boidman
Partner & Managing Director
PJ Solomon

...MOBILE / DIGITAL AND OOH ONLY FORMATS PROJECTED TO GROW IN NEXT FIVE YEARS



Why are traditional media channels declining?

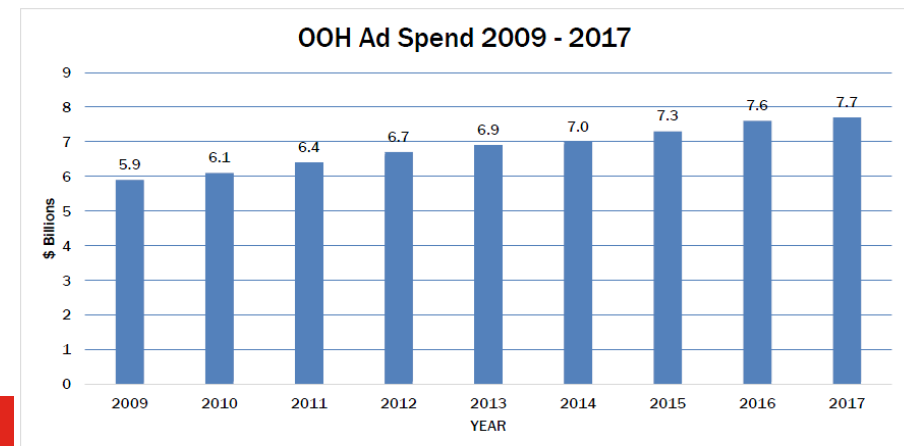
OOH and Overall Ad Revenue Trends - Competition

- Television: No more “appointment programming” due to Netflix and other OTT options
 - Time spent with television continues to decrease annually
- Cable: Consumers are cutting the cord
 - Household penetration of cable TV fell below 80% in November 2017, the lowest figure in 15 years
- Newspapers: Consumers are moving nearly entirely to digital formats
 - Weekday circulation has fallen below 40mm, from highs of 60+mm in the '80s and '90s
- Radio: Traditional consumption has held up despite the proliferation of Spotify, Pandora, iTunes, and Amazon
 - Growth in terrestrial radio is gone and should start declining

Media Format	Growth Rate 2016	Growth Rate 2017	Projected Growth Rate 2018
OOH	3.1%	1.2%	2.1%
Total TV *	0.1%	-2.7%	-2.5%
Radio	-2.9%	-2.4%	-4.2%
Newspaper	-12.1%	-15.4%	-19.8%
Magazine	-8.7%	-13.4%	-15.5%
Total Traditional Media	-2.4%	-4.7%	-5.1%
<i>OOH Variance to Total Traditional Media</i>	<i>+5.5%</i>	<i>+5.8%</i>	<i>+7.2%</i>
Digital Media (search, display, video, social, mobile)	20.4%	18.1%	14.3%
Total Core Media	5.7%	4.5%	3.7%

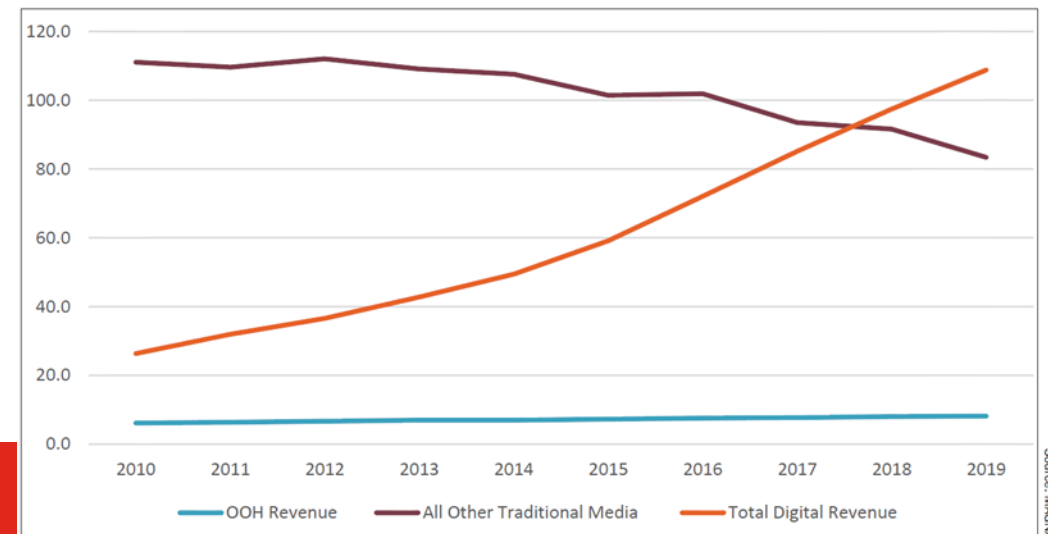
OOH and Overall Ad Revenue Trends – OOH Positives

- Limited competition and ability to aggregate an audience
- No OTT companies, no ad-blocking – users cannot opt out
- Digital and mobile adding growth, but slowing down and has own challenges
- Potential Mergers & Acquisitions
- Over-indexed by top brands – indicative of underlying ROI?



OOH and Overall Ad Revenue Trends – OOH Negatives

- Little revenue growth – small base
- Need for “next big thing” once digital penetration stabilizes
- Potential for cannibalization versus growing OOH share
- Autonomous vehicles present potential long term risk (but only in the long term)
- Still difficult to prove out ROI, but companies are getting there



OOH and Overall Ad Revenue Trends

“Out of home is becoming more versatile... It's growing share in 2018, 6.3% of measured advertising, we think, the highest it's been since 1993 and the only medium growing share other than digital.”

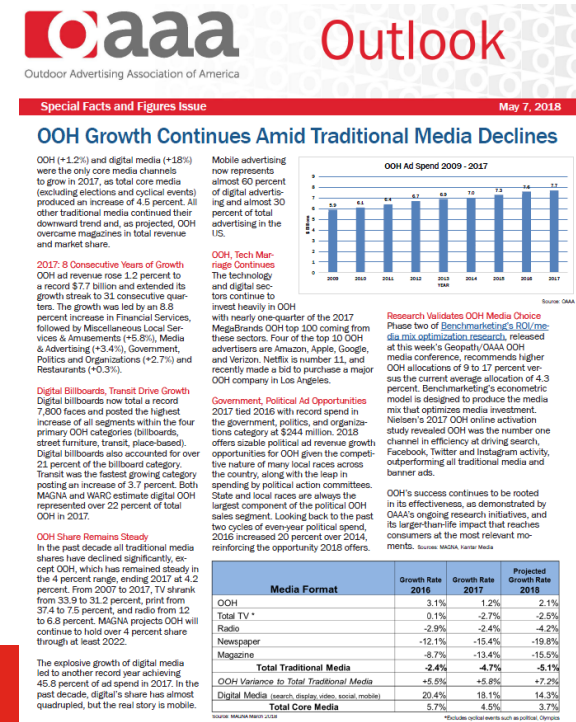
- WPP, Q4 2017 Earnings Call



OOH and Overall Ad Revenue Trends - Conclusions

- Digital currently taking all new ad spend, but might it take more?
- The music has stopped (other than streaming!): a reckoning is coming for traditional media formats
 - Print, TV, and radio ad spend are stagnating or contracting, with declines likely to accelerate
 - Audiences are shrinking as consumers spend more and more time online, less time with traditional formats
- With continued investment in tech, OOH is positioned to grow share and spend in the face of these other media channel declines
 - Consumers spending more time mobile and on the go
 - Can not be avoided
- Audience-selling and attribution will be key for future growth

OOAA Outlook – Special Facts & Figures Issue



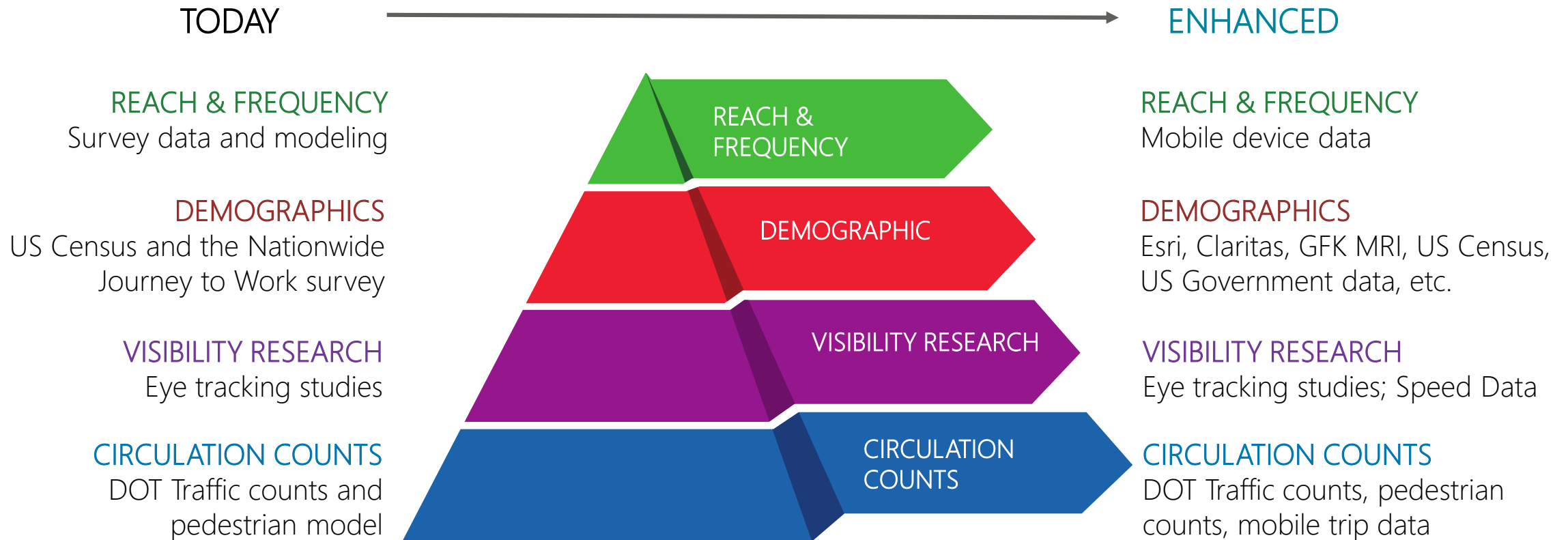
OOH CEO Town Hall

- Digital OOH continues as a major focus – scalability important across all initiatives
- Be a part of digital media ecosystem (accountability, data/attribution, digitally compatible)
- Mobile data an important part of the OOH model – for data insights and leverage for OOH sales
- Need to coordinate and collaborate as industry to garner more share

Kevin Gleason, Adams Outdoor | Scott Wells, Clear Channel Outdoor | Sean Reilly, Lamar | Jeremy Male, OUTFRONT Media



Geopath – Standardized Measurement and Enhanced Ratings



More information – [Geopath.org](https://geopath.org)

Power of OOH Creative – Tito's Handmade Vodka



Power of OOH Creative – High Brew Coffee

**AUSTIN CITY LIMITS
MUSIC FESTIVAL**

PRE-FEST ACTIVATION

ENTER TO WIN THE
FESTIE BESTIE
giveaway

Digital Sweeps (Do512)

OOH

ON-SITE ACTIVATION

Commemorative Can

Festival Sampling

High Brew Liner

Additional Activation

Media & PR

Social Media

SALES

Retail Programming

Distributor Engagement

Festival Sales

Advertising:

Iconic OOH

Geotargeted Digital

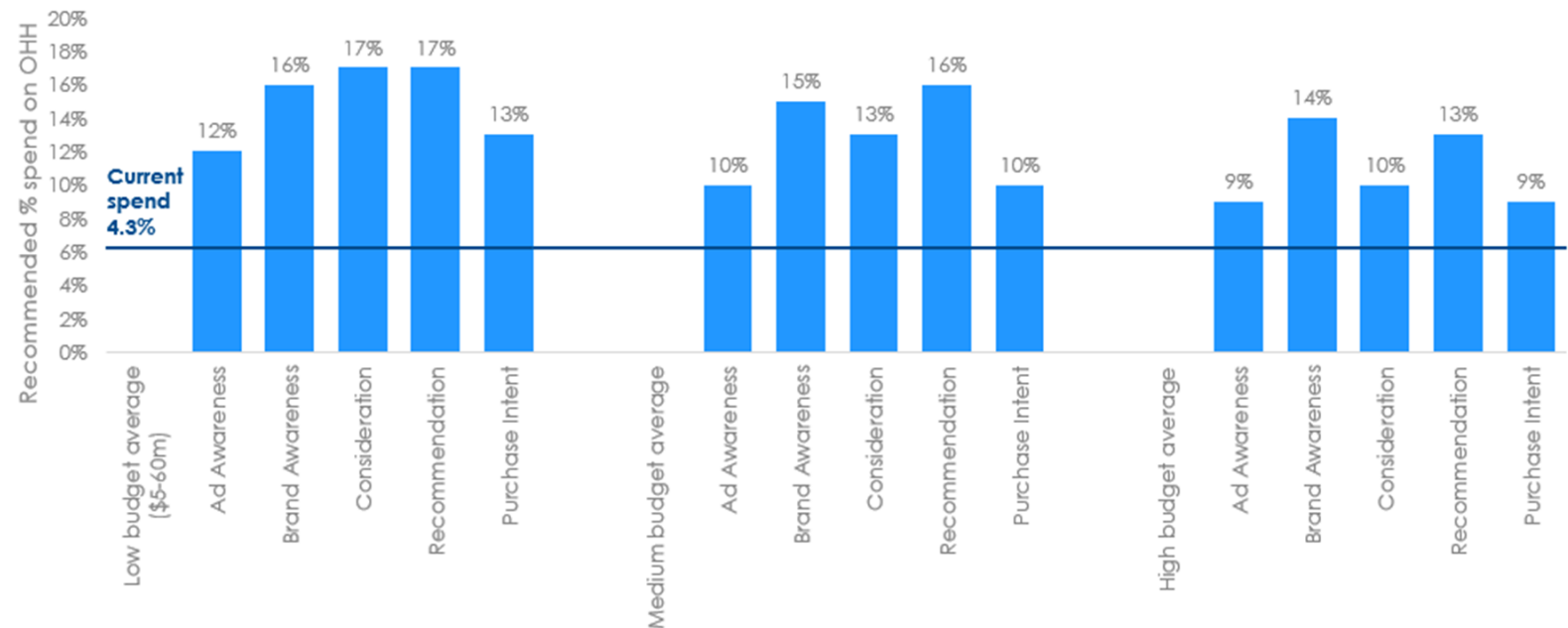
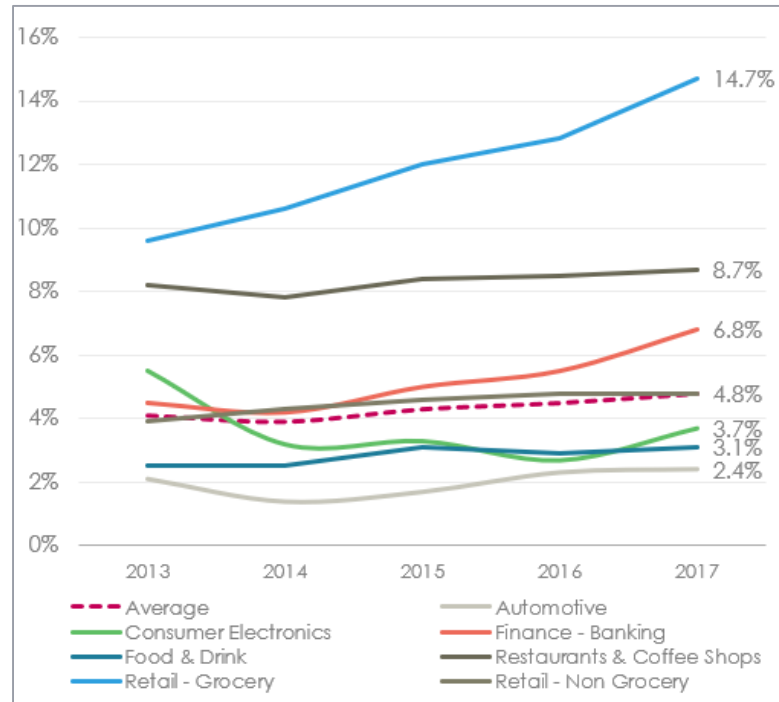
**Strategic &
Function
Driven OOH**

Outdoor Advertising Association of America

Benchmarking – OOH Media Mix Optimization

More should be spent on OOH at all budget levels and in all phases of customer journey

OOH Share Growth in Key Product Verticals
2013 – 2017



[Benchmarking OOH ROI & Media Mix Optimization](#)

Benchmarking – OOH Media Mix Optimization

OOH under-allocated in all categories analyzed

AUTOMOTIVE

2017 spend : 2.4%

AVG spend (2013-17): 2.0%

Key Insights: BA Focus

LOW – BA (14%)

MED – BA (10%)

HIGH – BA (9%)

CONSUMER ELECTRONICS

2017 spend : 3.7%

AVG spend (2013-17): 3.7%

Key Insights: REC Focus

LOW – REC (17%)

MED – REC (18%)

HIGH – REC (16%)

FINANCE - BANKING

2017 spend : 6.8%

AVG spend (2013-17): 5.2%

Key Insights: REC Focus

LOW – CON & REC (42%)

MED – REC (41%)

HIGH – REC (22%)

FOOD & DRINK

2017 spend : 3.1%

AVG spend (2013-17): 2.8%

Key Insights: BA Focus

LOW – PI (18%)

MED – BA (10%)

HIGH – BA (10%)

RESTAURANTS & COFFEE SHOPS

2017 spend : 8.7%

AVG spend (2013-17): 8.3%

Key Insights: PI Focus

LOW – PI (19%)

MED – PI (19%)

HIGH – PI (18%)

RETAIL - GROCERY

2017 spend : 14.7%

AVG spend (2013-17): 11.9%

Key Insights: BA Focus

LOW – BA (36%)

MED – BA (36%)

HIGH – BA (36%)

RETAIL – NON GROCERY

2017 spend : 4.8%

AVG spend (2013-17): 4.5%

Key Insights: REC Focus

LOW – PI (26%)

MED – REC (17%)

HIGH – REC (16%)

AVERAGE CATEGORY

2017 spend : 4.8%

AVG spend (2013-17): 4.3%

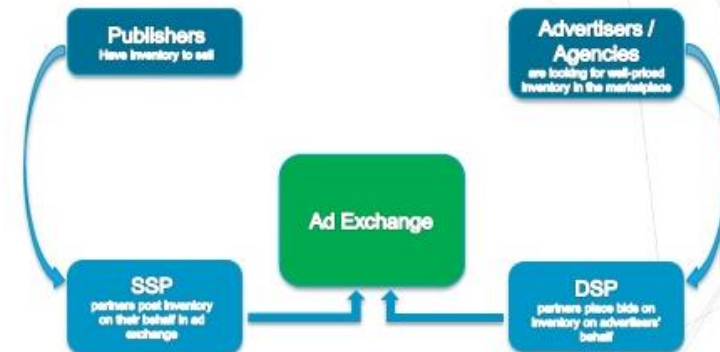
Key Insights:

Brands tend to benefit from increasing their % OOH to improve **Brand awareness, Recommendation, Purchase Intent**

Supply Side Programmatic OOH

- Increasing interest in programmatic including OOH agencies, and direct sale opportunities through platforms (MediaMath, The Trading Desk)
- Offers operational efficiency - appeals to buyers seeking optimization through attribution
- Expands the market to those not currently using OOH
- Programmatic can include printed OOH by automating some of the steps
- OOH value enhanced if exact audience viewing can be defined at precise moments
- CPM protection - transactions only happen in ranges set by both supply and demand side
- Digital OOH inventory is finite - a benefit in comparison to all other forms of digital media with unlimited inventory

Ad Exchange



Machine Learning – A Look Inside OOH Sales

Key Findings:

- Buyers reward vendors that provide more data, especially impressions and audience
- On average, buyers appear to prefer lower CPMs rather than large numbers of impressions at a higher net media cost
- Despite seeking lower CPMs, buyers do appear to factor “intangibles” into their purchasing decisions
- As distance increases from city centers, assets appear to have more likelihood to be contracted
- Buyers value sellers that can execute campaigns faster



Project Methodology:

- Unsupervised machine learning (A.I.) categorized data into relevant datasets, then regression analysis identified correlations between assets proposed and contracted.
- Sample: Geopath assets proposed in response to RFPs from agencies with \$1M+ annual OOH media spend.
- Over one million data points considered.

Future of OOH



Neil Eddleston, Managing Director – JCDecaux: OOH's Viewability Advantage

- Digital online world will be pushed to enhance viewable definition
 - 44% of mobile ads viewable; 61% of desktop viewable; 100% of printed OOH and 60-70% of digital OOH viewable
 - Likelihood to see? #1 OOH, #2 Mobile, #3 Desktop, while dwell time is consistent across media.

Dan Levi, CMO – Clear Channel Outdoor: Value of OOH's Audience Insights

- Understanding real world consumer behavior and mobility - highly efficient way to reach target audiences.
 - CCO's RadarView provides a dynamic view of audience AND location-driven OOH opportunities. RadarView's marriage of locations, demographics and behaviors delivers insights to create planning efficiencies by aligning analytics and movement data. They've built over 500 demographic segments to help target clients' customers.

Jason Kuperman, Chief Product Experience Officer – OUTFRONT Media: Automating Ad Publishing

- 50K screens with NYC MTA, 1K screens going up in Boston, just won BART contract in San Francisco
 - Must automate the publishing structure with AI decision-making due to quantity of screens - can't have manual processes.

OAAA/Geopath OOH Local Case Study Awards



[OOH Local Case Studies Library](#)

Lee Houghton
YESCO Outdoor Media



Runners-up

- Lindsay Jasser, *OUTFRONT Media*
- Katie Waldeck, *Clear Channel Outdoor*
- Heather Geron, *JCDecaux*
- Ben Lewis, *OUTFRONT Media*
- Adams Outdoor Lehigh Valley PA Office

Ad Council Crystal Bell Award - Intersection



Intersection



The Ad Council's Nicole Husband presented the 2018 Crystal Bell Award to Ari Buchalter, Intersection.

The background of the entire image is a red brick wall with white mortar lines. The bricks are arranged in a standard running bond pattern.

STEAL

THE

SHOW

A woman with long brown hair, wearing a black sequined dress and a small microphone, is smiling and gesturing with her hands outstretched. The background is a blurred stage setting with blue and purple lighting. Other people are visible in the background, some holding cameras.

HOST:
Jen Kramer,
Illusionist

Audience Participation



2018 OBIE Award Judges



Matt Murphy – Chief Judge,
Executive Creative Director and
Partner, 72andSunny



Michael Anderson,
Creative Director
McGarrah Jessee



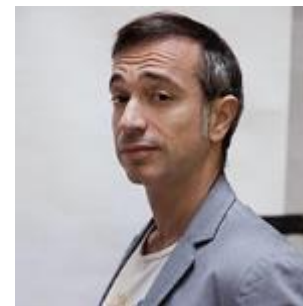
Rudy Ferrer, COO
Delta Media, Inc.



Ted Florea, Global Chief
Strategy Officer,
Krishenbaum Bond
Senecal + Partners



Jayanta Jenkins,
Global group Creative
Director, Twitter



Sergio Spaccavento,
Executive Creative
Director, Conversion



Todd Turner, National
Creative Director,
Adams + Fairway

2018 OBIE Entry, Winner Stats



NUMBER OF YEARS OF
THE OBIES

76



TOTAL 2018
SUBMISSIONS

700+



2018 GOLD OBIES

7



2018 SILVER OBIES

15



Custom Installation: Milwaukee Brewers Baseball Club Rolling Away the Tarp



Engagement: Viceland, Weed Week



Entertainment: OUTFRONT Studios, San Diego Taco Fest



Experiential: Grandesign, OMG, Warner Brothers Neibolt House Experience



International: Spotify, 2018 Goals



Media: Lindemmen Associates Stranger Things



Nonprofits & Public Service: 22squared, Irma Gives Back



Platinum: Spotify



Craft Awards

Craft awards were also added in 2017 to celebrate individual skills in OOH design.

- Copywriting
- Digital Design
- Illustration
- Photography

Copywriting: Spotify 2018 Goals



Digital Design: space150, Coca Cola



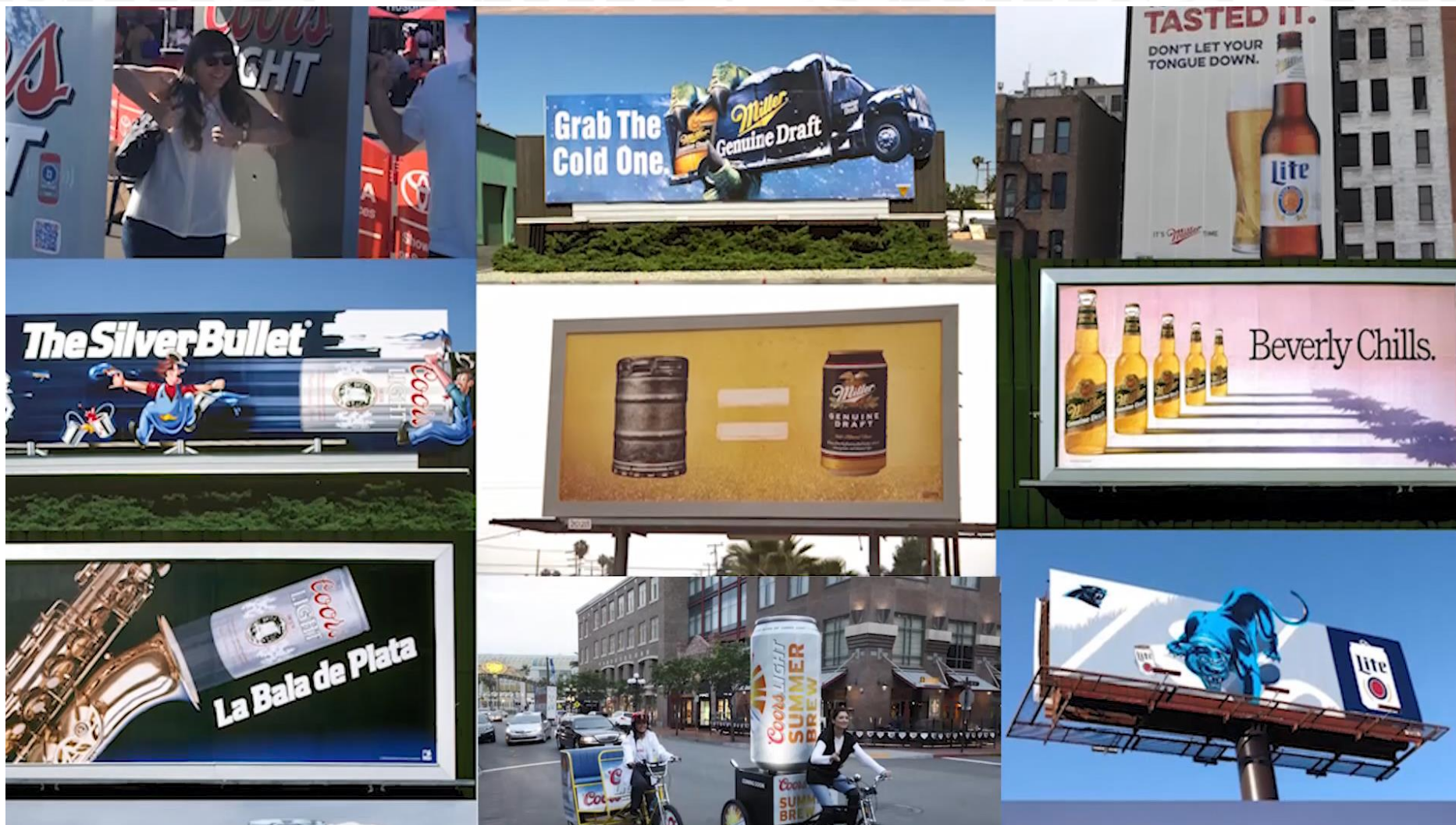
Illustration: Colossal Media, Adidas



Photography: National Geographic #SaveTogether



Hall of Fame: MillerCoors



Silver OBIE Award Winners



OBIEAwards.org

CONGRATS OBIE WINNERS

See who stole the show at the
2018 OBIE Awards.



View the 2018 OBIE Awards Winners Gallery

[see the gold, silver & finalists]



Order the 2018 OBIE Awards Book



The OBIE Awards Book is a lasting tribute to the year's best creative OOH campaigns. Purchase your copy today. [\[order the book \]](#)

Save the Date – 2019 OAAA/Geopath OOH Media Conference & Expo

