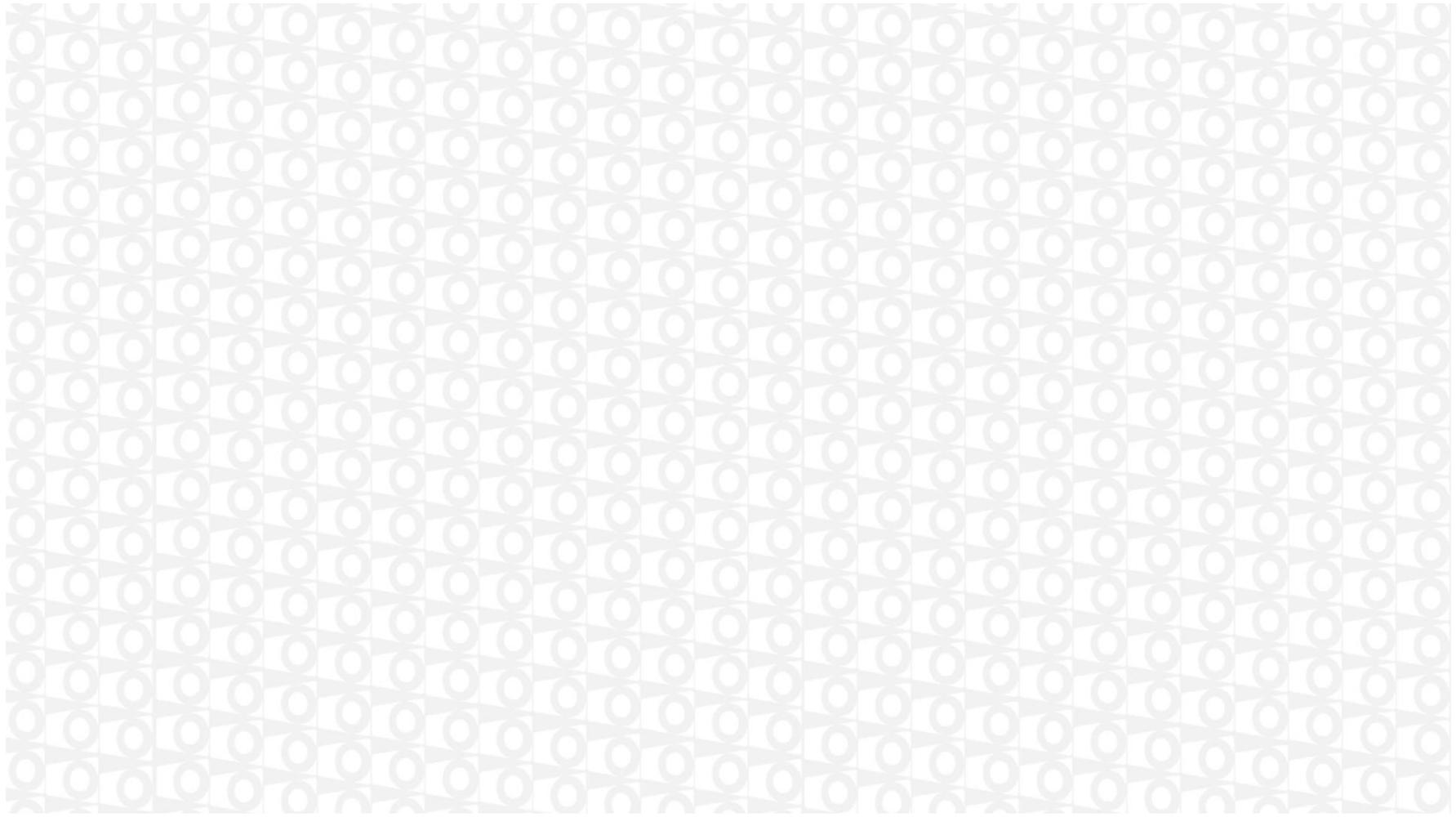




Out of Home Advertising Association of America

Real. Powerful. Advertising.



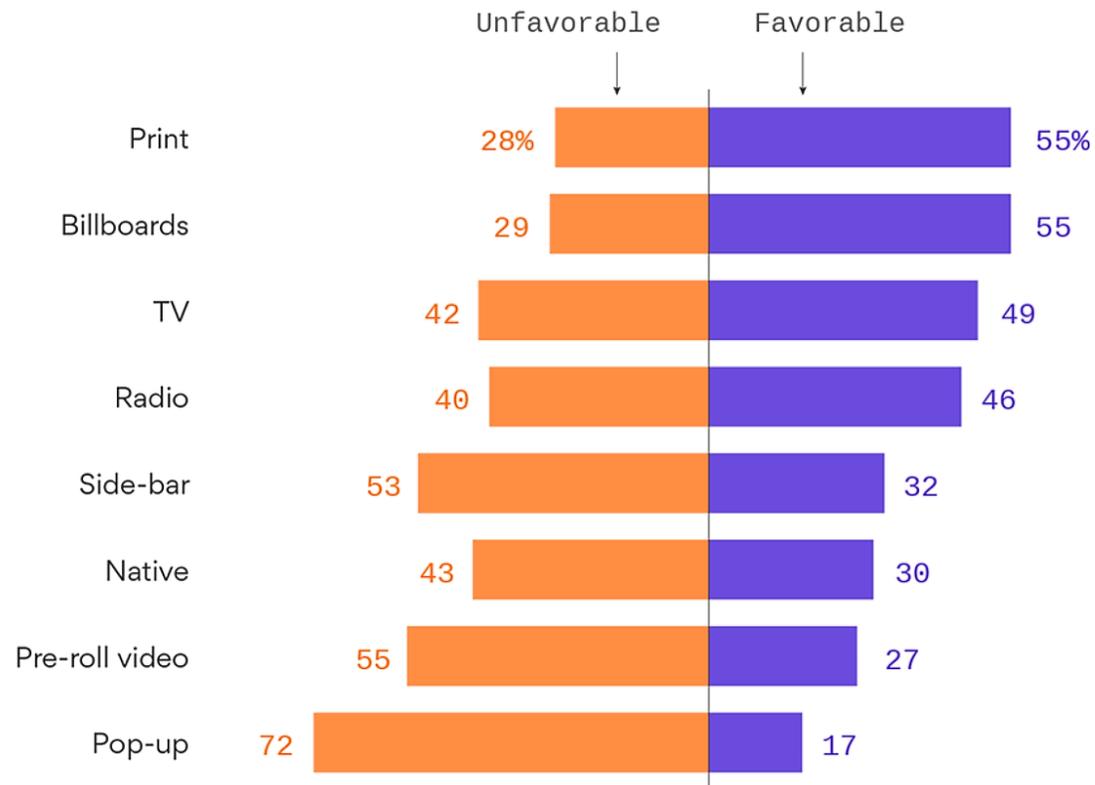
OOH – UBIQUITOUS FORMATS

NUMBER OF OUT OF HOME DISPLAYS (2019)			
BILLBOARDS	STREET FURNITURE	TRANSIT	PLACE-BASED OOH
<ul style="list-style-type: none"> Bulletins 164,370 Digital Billboards 9,100 Posters 147,029 Junior Posters 19,818 Wall Murals 2,289 	<ul style="list-style-type: none"> Bus Shelters 63,239 Urban St. Furniture 39,128 Bus Benches Newsracks Newsstands Phone Kiosks Urban Panels Digital St. Furniture 5,742 	<ul style="list-style-type: none"> Airports 29,476 Digital Airport 2,350 Buses 1.05 million Rail/Subway 365,113 Digital Rail/Subway 5,454 Digital Transit 7,847 Mobile Billboards 514 Taxis 44,008 Digital Taxis 33,800 Truckside 3,501 	<ul style="list-style-type: none"> Arena & Stadiums 961 Cinema 35,800 Digital Place-based 1.25 million Interior Place-based Convenience Stores Health Clubs Restaurants/Bars Exterior Place-based Airborne Marine Resorts & Leisure Shopping Malls 21,700 Digital Shopping Mall 5,830



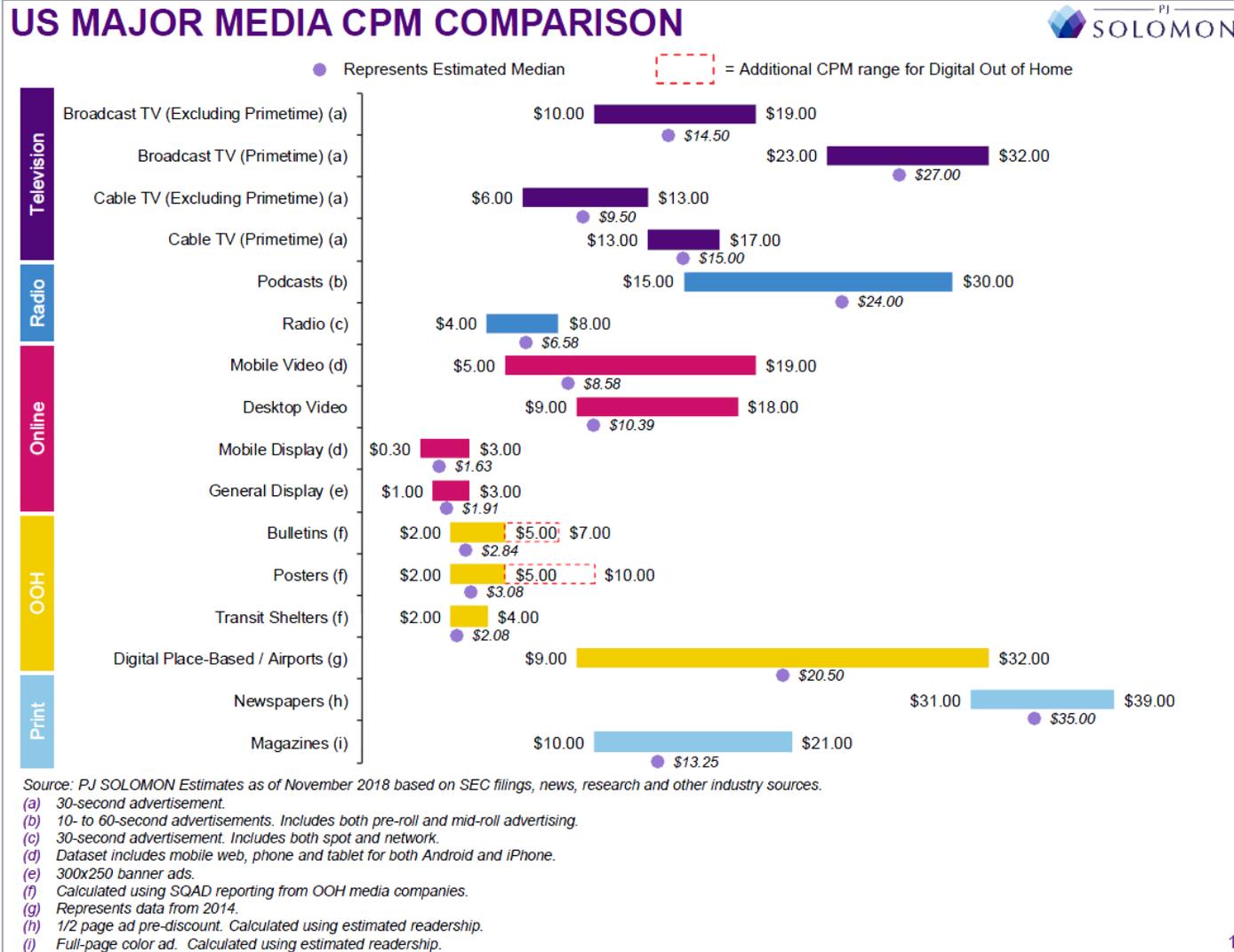
OOH IS TIED FOR #1 IN CONSUMER AD FAVORABILITY

Favorability towards different ad types among U.S. adults



Data: Morning Consult, August 24-September 8, 2017. Note: Excludes 'Don't know/No Opinion'; Chart: Andrew Witherspoon / Axios

OOH – DATA DRIVEN, HIGHLY COMPETITIVE VALUE



OOH OUTPERFORMS ALL TRADITIONAL MEDIA

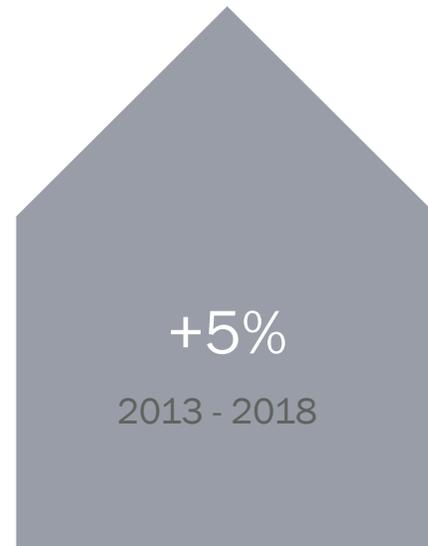
OOH - Second to Digital for Media Growth 2017 - 2019

Media Format	Growth Rate 2017	Estimated Growth Rate 2018	Projected Growth Rate 2019
OOH	1.2%	4.5%	2.6%
Total TV *	-2.7%	-1.7%	-3.1%
Radio	-2.5%	-1.9%	-5.2%
Newspaper	-15.4%	-17.2%	-19.5%
Magazine	-14.2%	-13.9%	-17.6%
Total Traditional Media	-4.7%	-3.8%	-5.2%
<i>OOH Variance to Total Traditional Media</i>	<i>+5.9%</i>	<i>+8.3%</i>	<i>+7.8%</i>
Digital Media (search, display, video, social, mobile)	18.1%	20.2%	11.7%
Total Core Media	4.9%	7.4%	4.1%

Source: MAGNA, April 2019

* Excluding cyclical events such as Political, Olympics

OOH Growth – Increased Time Spent & Mobility



Growing Audience

Leads all traditional media in consumer time spent growth – all others, other than Cable TV, are declining

Source: Borrell Associates



Increasing Consumer Mobility

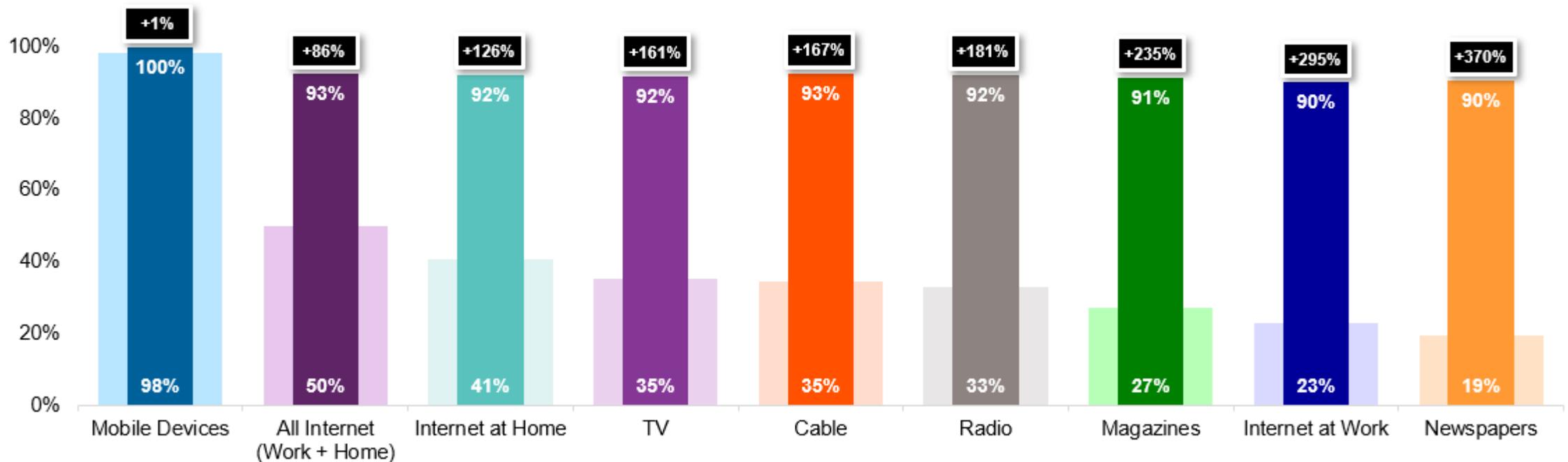
Total consumer miles driven, airline passenger travel

Source: US DOT

POWERFUL AMPLIFICATION EFFECT OF OOH

Adding OOH to heavy users of other media can double weekly audience and grow exposure to nearly 100%

Total Reach: Heavy Consumers of Other Media + Any OOH
Sorted by Volume



Heavy Other Media Consumers include adults 18-64 who fall into the top 2 volume groups for using that media type in the past 7 days.
Any OOH includes adults 18-64 who traveled any miles in a car as a driver or passenger, in a city, town or suburb, in the past 7 days.

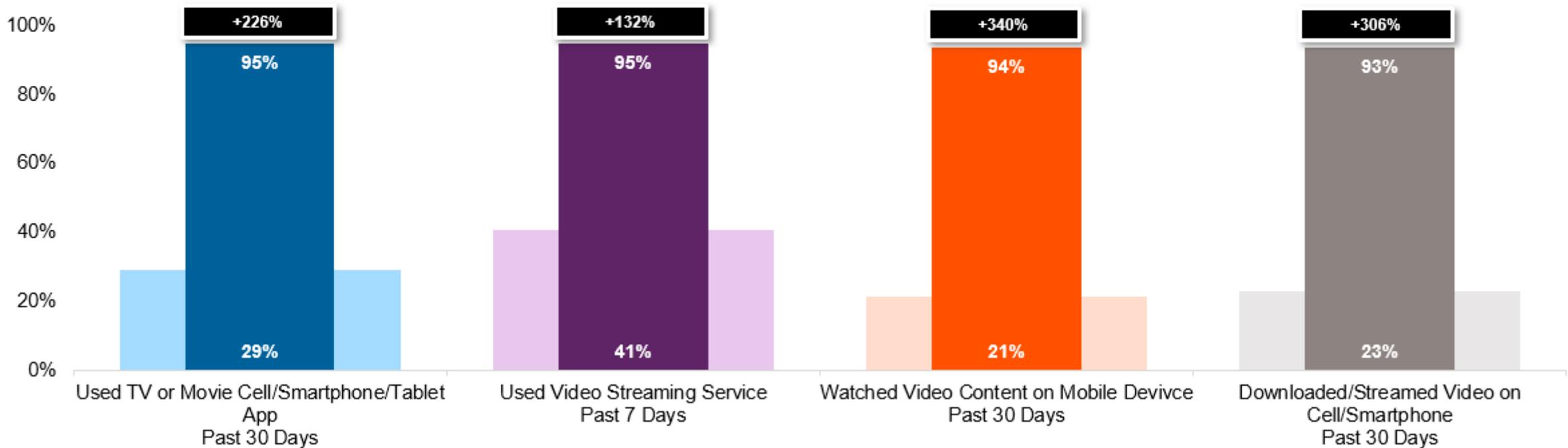
Source: MRI/Simmons

Base: Adults 18-64

POWERFUL AMPLIFICATION EFFECT OF OOH

Adding OOH to consumers who engage with digital/video media grows reach to nearly 100%

Users of Digital/Video Media Activities + Any OOH
Sorted by Volume



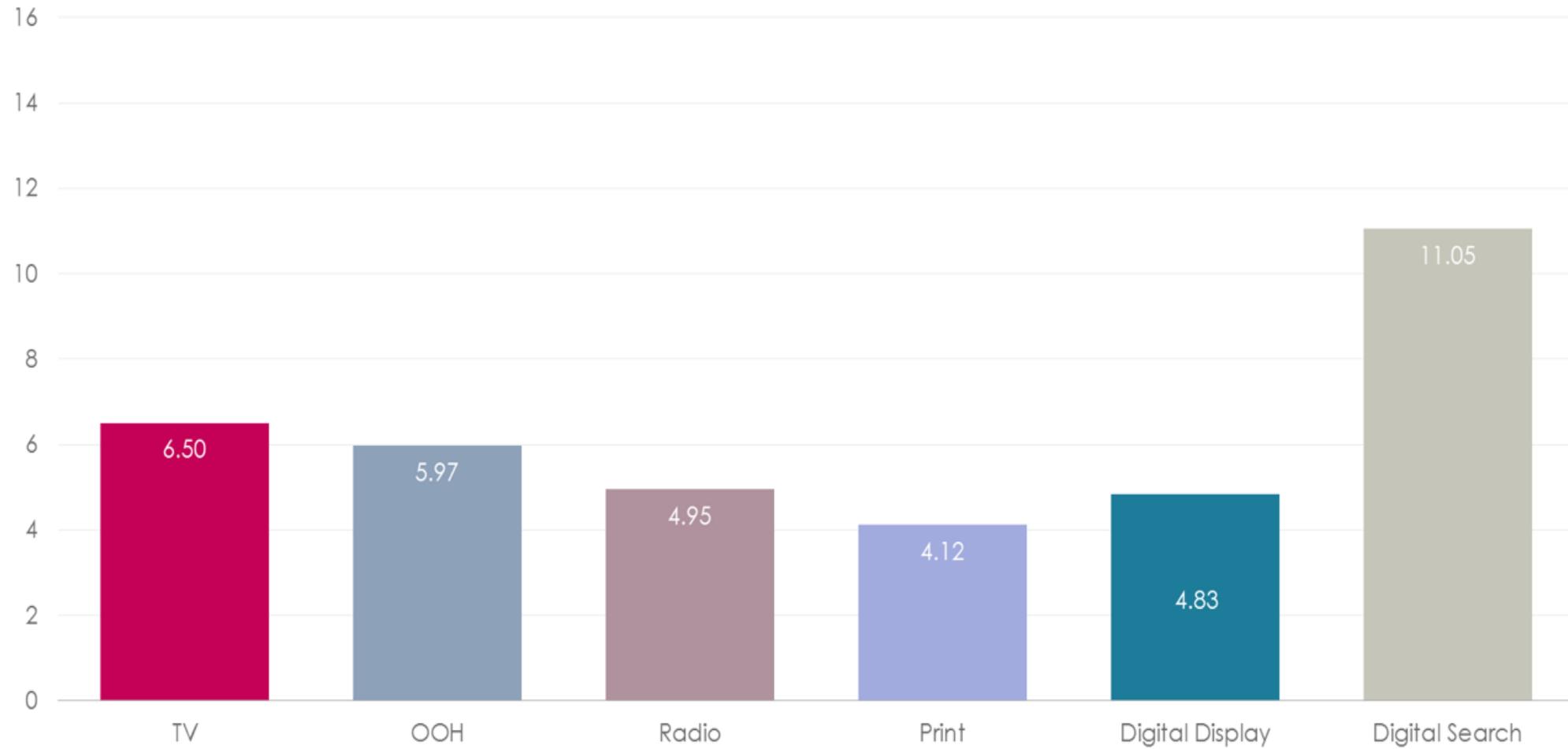
Any OOH includes adults 18-64 who traveled any miles in a car as a driver or passenger in a city, town, or suburb in the past 7 days OR noticed ads in movie theaters in the past 7 days.

Source: MRI/Simmons

Base: Adults 18-64



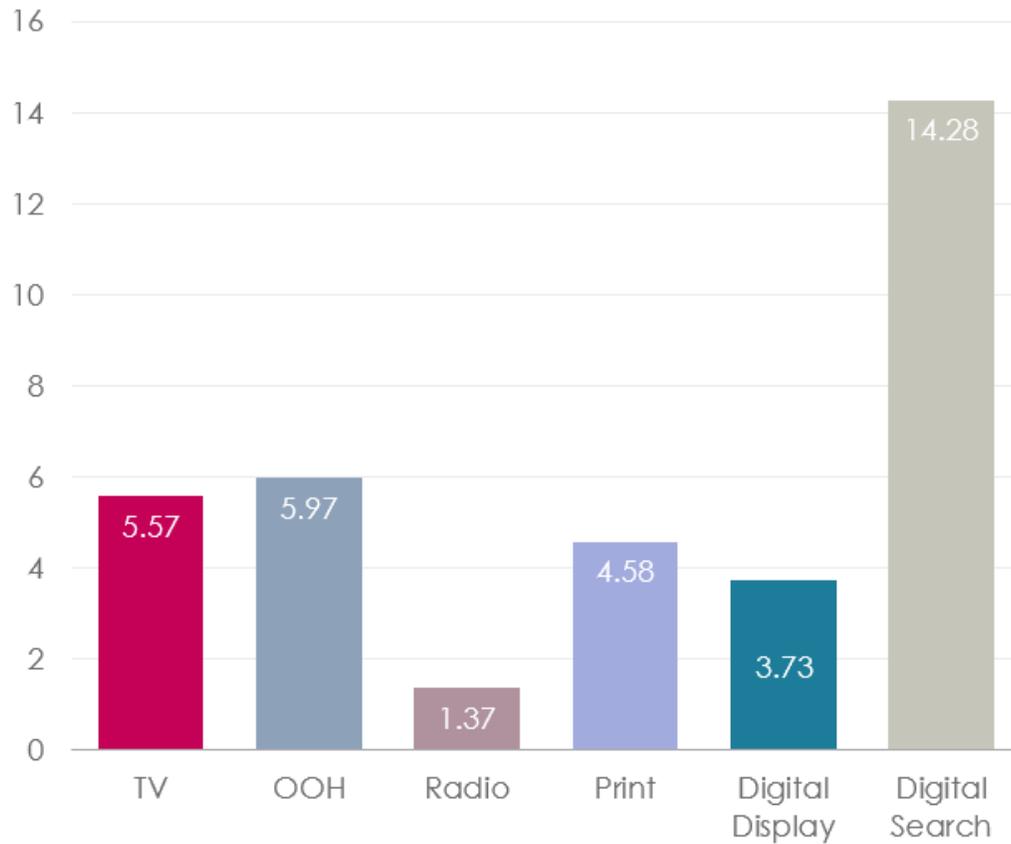
OOH – EFFECTIVE WITH STRONG ROI



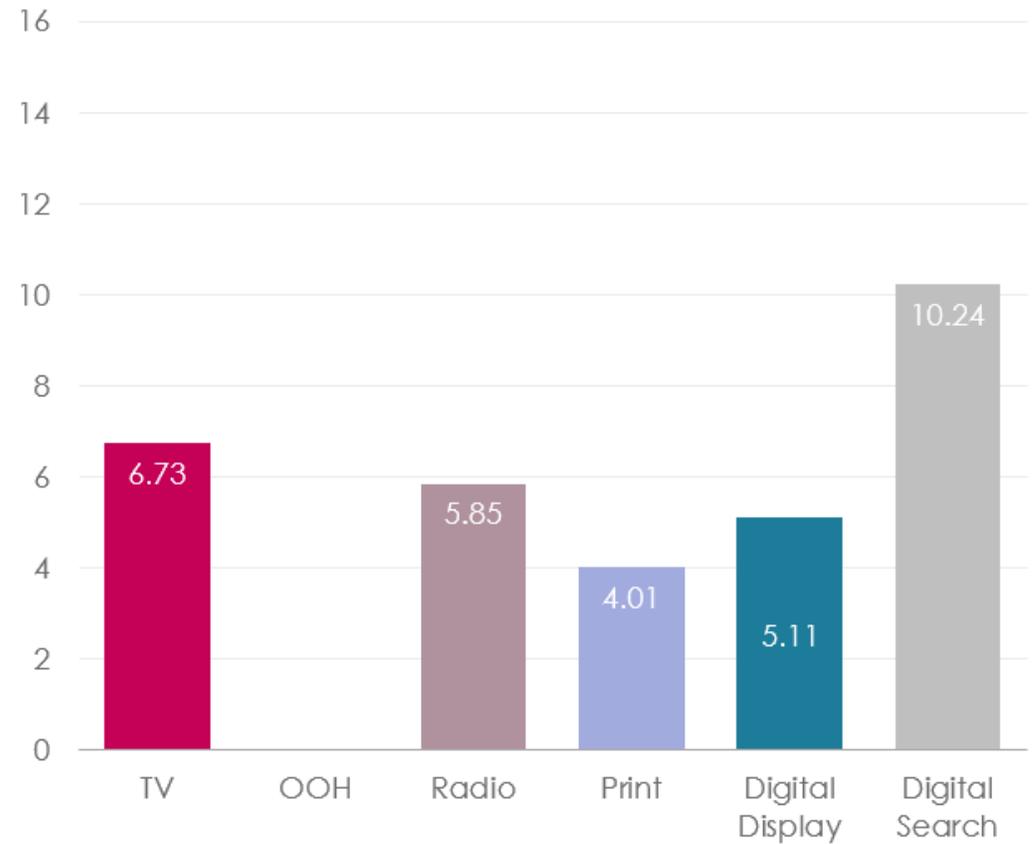
Source: Benchmarking

OOH INCREASES ROI FOR SEARCH +40% AND PRINT +14%

Using OOH

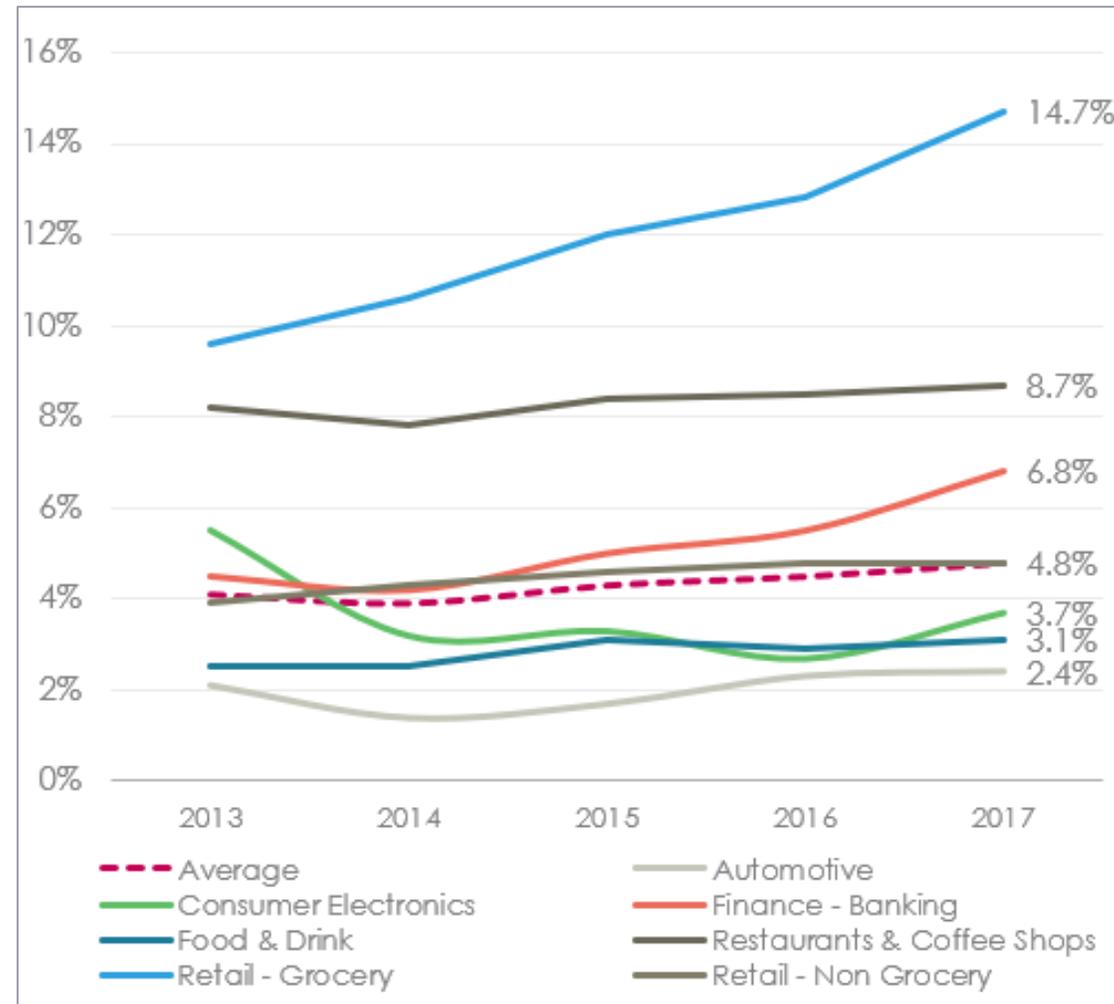


Not using OOH



Source: Benchmarking

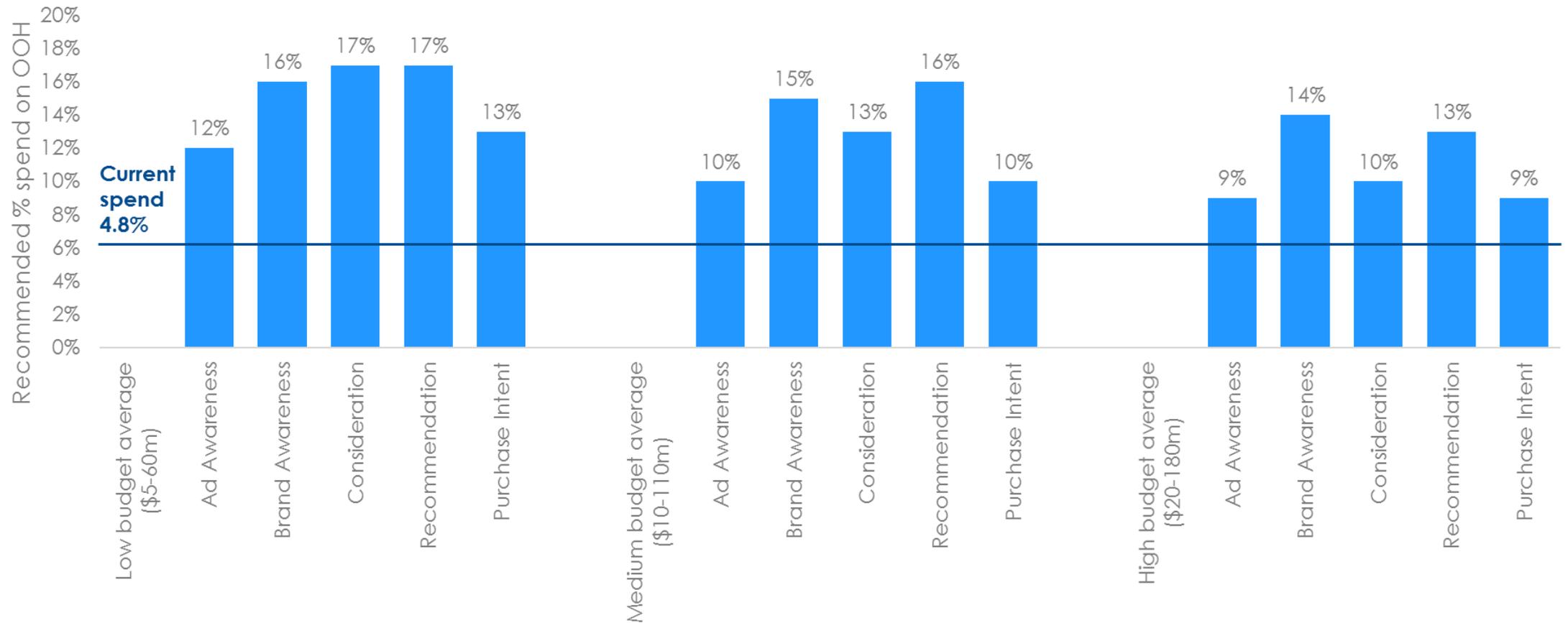
OOH – KEY PRODUCT SHARE GROWTH 2013 - 2017



Source: Benchmarking

INCREASED OOH SHARE WILL OPTIMIZE MEDIA PLANS

More should be spent on OOH at all budget levels



Source: Benchmarking Brand Planning Tool: Automotive, Consumer Electronics, Food & Drink, Finance – Banking, Restaurants & Coffee Shops, Retail – Grocery, Retail – Non Grocery categories

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**

- Ad Awareness (AA), Brand Awareness (BA), Consideration (CON), Recommendation (REC), Purchase Intent (PI)

Source: Benchmarking

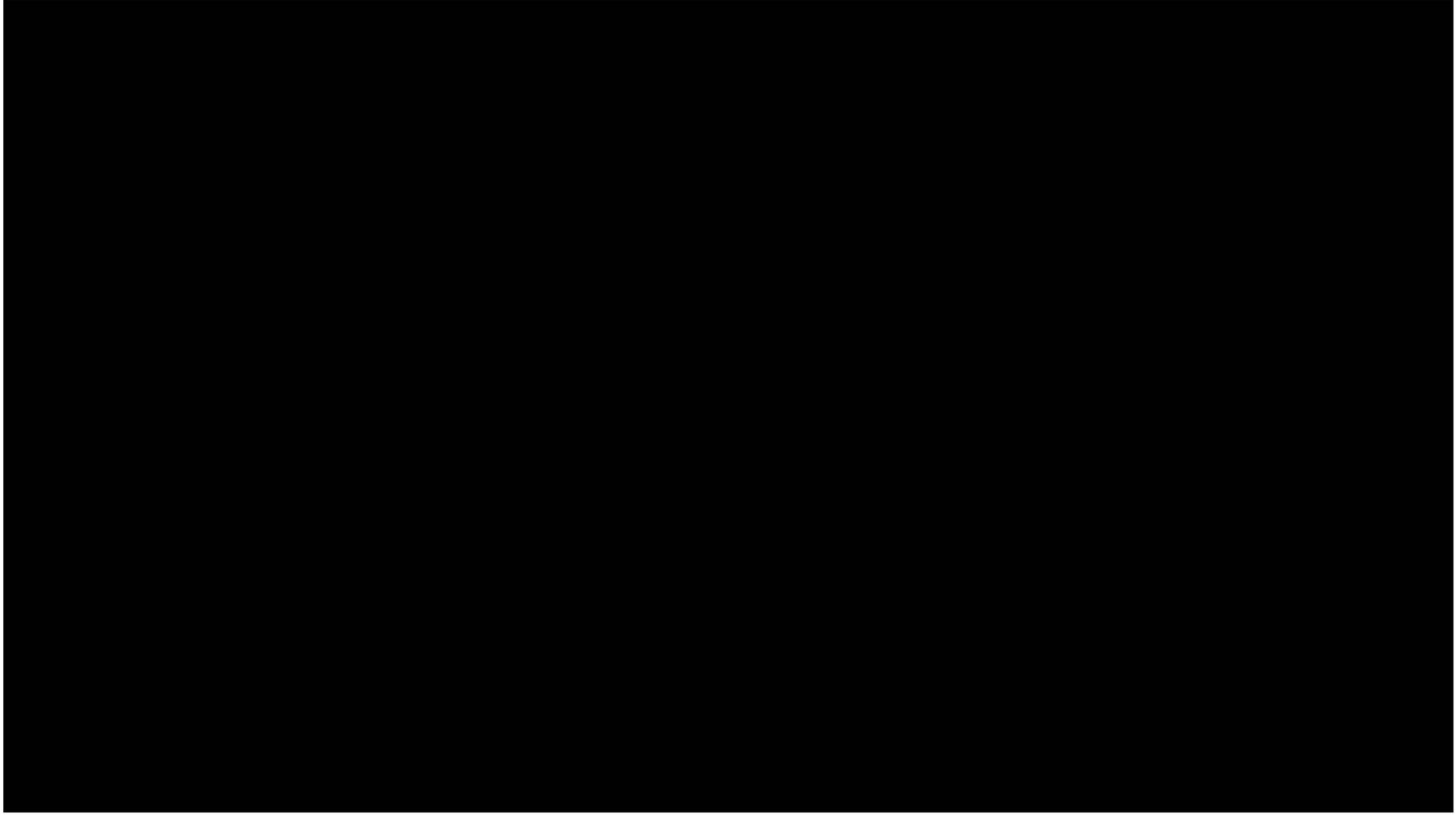
TOP BRANDS USING OOH IN 2018 INCLUDES FAANG



Source: Kantar Media

TRY IT...EFFECTIVE





INTEGRATED - SOCIAL MEDIA ENGAGEMENT

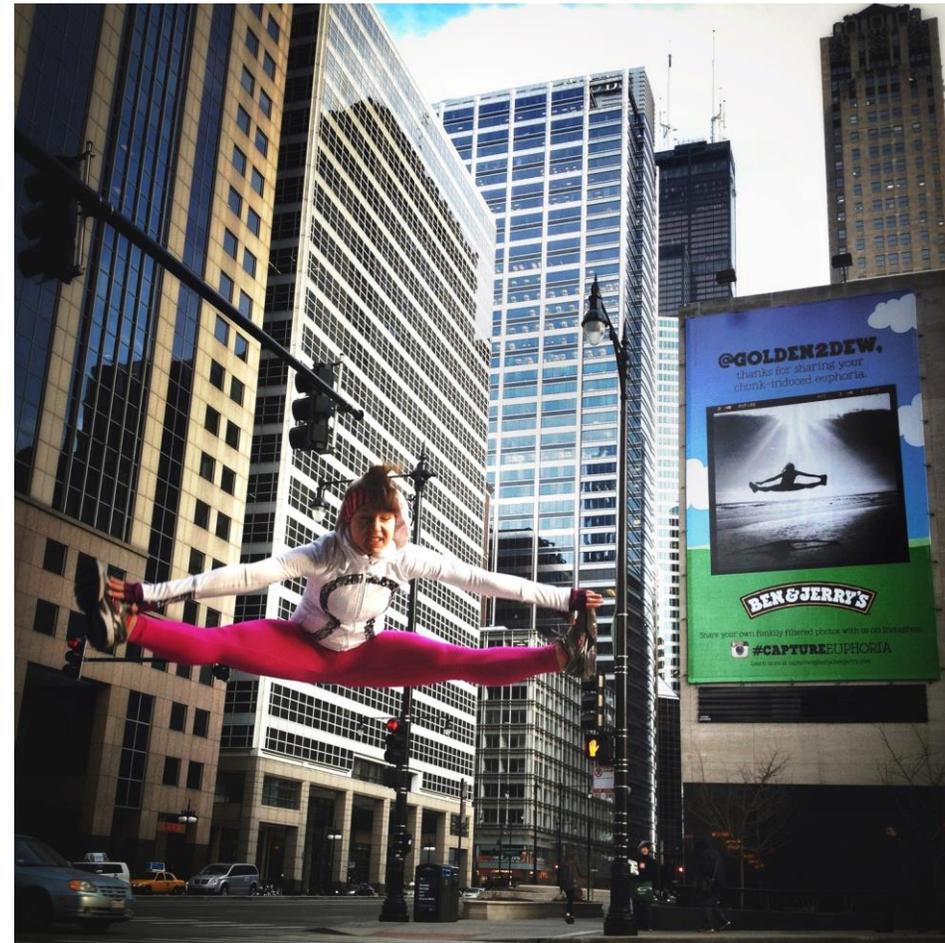
16 Markets Nationwide

18,000 submissions

700,000 Instagram likes

40,000 incremental Instagram fans

80 million earned impressions



OOH - REACH, QUALITY AUDIENCE, ENGAGEMENT



REACH

90% of U.S. residents age 16 or older noticed some form of out-of-home advertising in the past month, 80% noticed ads in the past week.



QUALITY TIME

Roadside billboards are the most noticed ads, and that stands to reason since travelers average 25+ hours on the road each week and cover over 159 miles. The heaviest travelers, Mega-Milers average 465 miles per week.



INTERACTION

66% of smartphone users took some type of action after seeing a OOH advertisement in the past year, and over 4 in 10 used online search to look up information.



AUDIENCE

Out of Home ad viewers are more likely to be both younger and have higher incomes than the general population.



Source: Nielsen 2019

Base: Adults 16+

OOH – HIGHEST INDEX A18–34, DRIVES CONSUMER TRAFFIC



ENGAGEMENT

83% of billboard viewers make a point to look at the advertising message at least some of the time; 4 in 10 look at the billboard ad each time or almost each time they noticed one.



VARIETY

People encounter OOH ads in a wide range of places. 81% of travelers have noticed a roadside bulletin, digital bulletin or poster, and 78% noticed a transit advertising in the past month.



YOUNG PEOPLE

Travelers age 16 to 24 and 18 to 34 are more likely to recall seeing various types of out-of-home media in the past month.



IN-STORE

39% noticed a directional OOH ad, 20% of OOH viewers visited immediately after seeing the ad, and 74% of those visitors made a purchase.



Source: Nielsen 2019

Base: Adults 16+

OOH IMPACT – MOBILE ACTIVATION

Actions taken by consumers after viewing any OOH media in the past year...



MOBILE INTERACTION

Used online search (such as Google) to look up information about the advertiser 42%



Accessed a coupon or discount code 33%



Visited an advertiser's website 32%

Downloaded or used an app shown in the ad 21%



Snapped a photo of an ad 18%

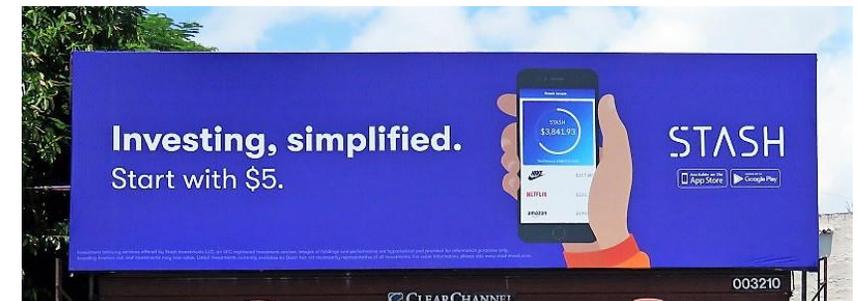
Interacted with an ad to send a message, upload a photo or vote 13%



Interacted with an out-of-home advertisement by either swiping an NFC sensor, scanning a QR code or sending a SMS text. 20%



ANY OF THE ABOVE ACTIONS 66%



Source: Nielsen 2019

Base: Adults 16+

OOH IMPACT- INFLUENCING BEHAVIOR

TOP THINGS PEOPLE THINK ABOUT DURING THEIR DAILY COMMUTE



Family	74%
Work	71%
Finances	50%
Friends	43%
What I'm going to eat later that day	36%
Plans for this evening	33%
Plans for the weekend	33%
Food shopping I need to do	31%
Current events/news	27%
Shopping for things other than food	19%
Your car or other auto needs	18%
Politics	15%
My health and/or medical conditions	14%
What to watch on TV or stream online	12%
Vacation plans	11%



Source: Nielsen 2019

Base: Adults 16+

nielsen POSTER ADVERTISING STUDY 2017



HIGHLIGHTS



POSTER VIEWERSHIP

Over half of the adults surveyed (51%) noticed a poster advertisement in the past month and 38% noted a poster in the past week.



AD RECALL

The average ad recall per poster campaign tested was 47%; meaning 47% of poster viewers in the campaign's local market, recalled seeing that specific ad.



REACHING YOUNG ADULTS

Younger adults were more likely to notice posters. Poster viewership was highest among people age 25-34 with 71% noticing a poster in the past month.



MORE IS BETTER

The number of posters used by a brand directly impacted overall ad recall for the campaign. Brands using 40 or more posters yielded substantially higher ad recall levels.



HIGH ENGAGEMENT

Half of poster viewers (50%) are highly engaged with the ads and look at the messages either all or most of the time.



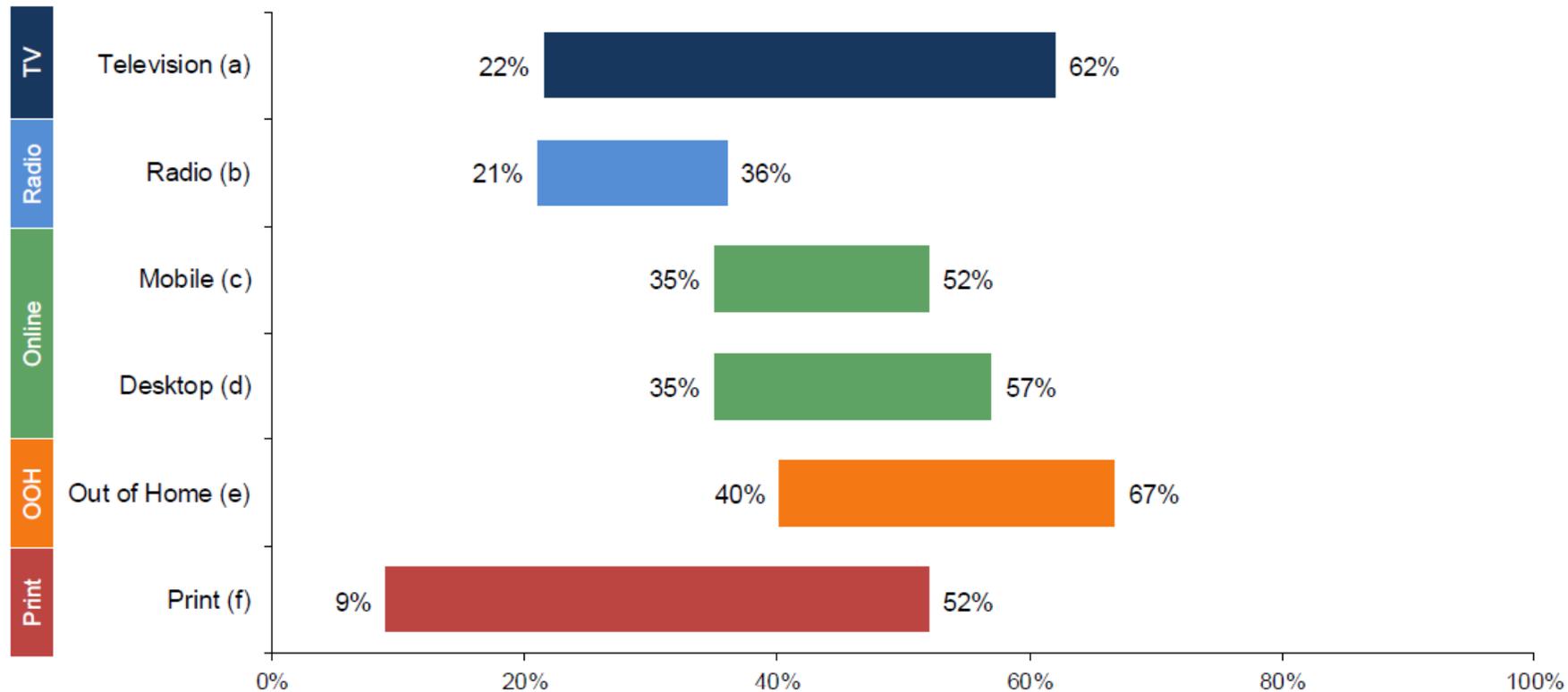
POSTERS STAND OUT

Over half of poster viewers agree poster ads stand out more than ads seen in newspapers, online, on mobile devices or over the radio.

Source: Nielsen Base: Adults 18+

Advertising Effectiveness – PJSC Study and Recall Comparison Analysis

- Based on PJSC independent study of the five primary advertising channels
- Advertising recall defined as advertising effectiveness in which respondents were exposed to an advertisement and then at a later point in time, respondents were asked if they remembered the advertisement on an aided or unaided basis



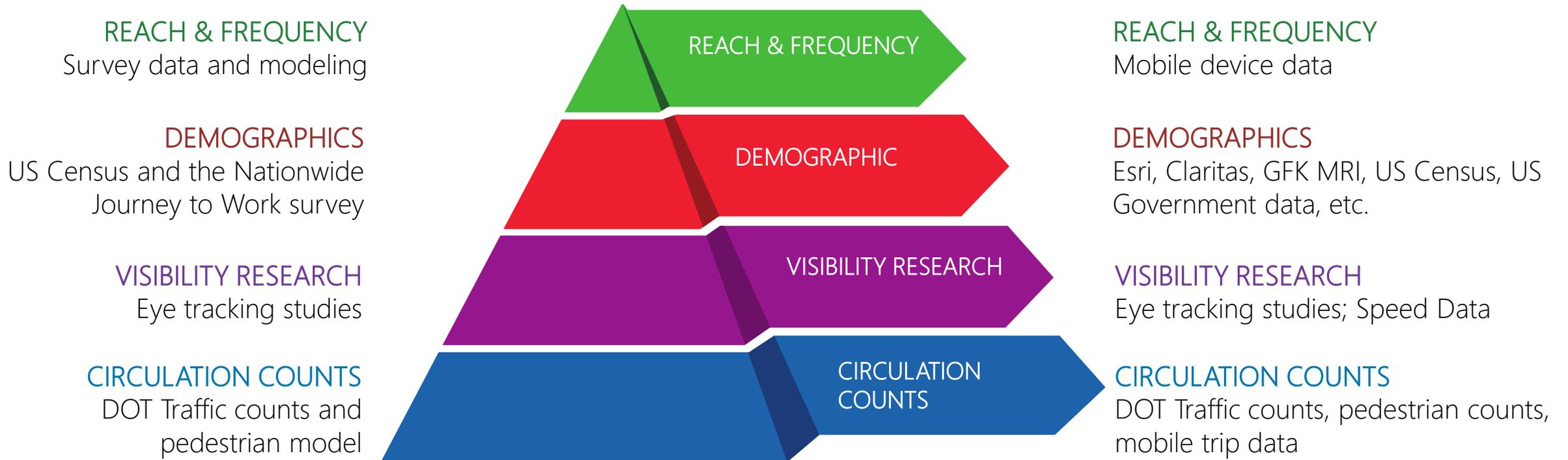
Source: Peter J. Solomon Company Study as of March 2017 and Wall Street research.

OOH RATINGS - ENHANCED MEASUREMENT METHODOLOGY OVERVIEW

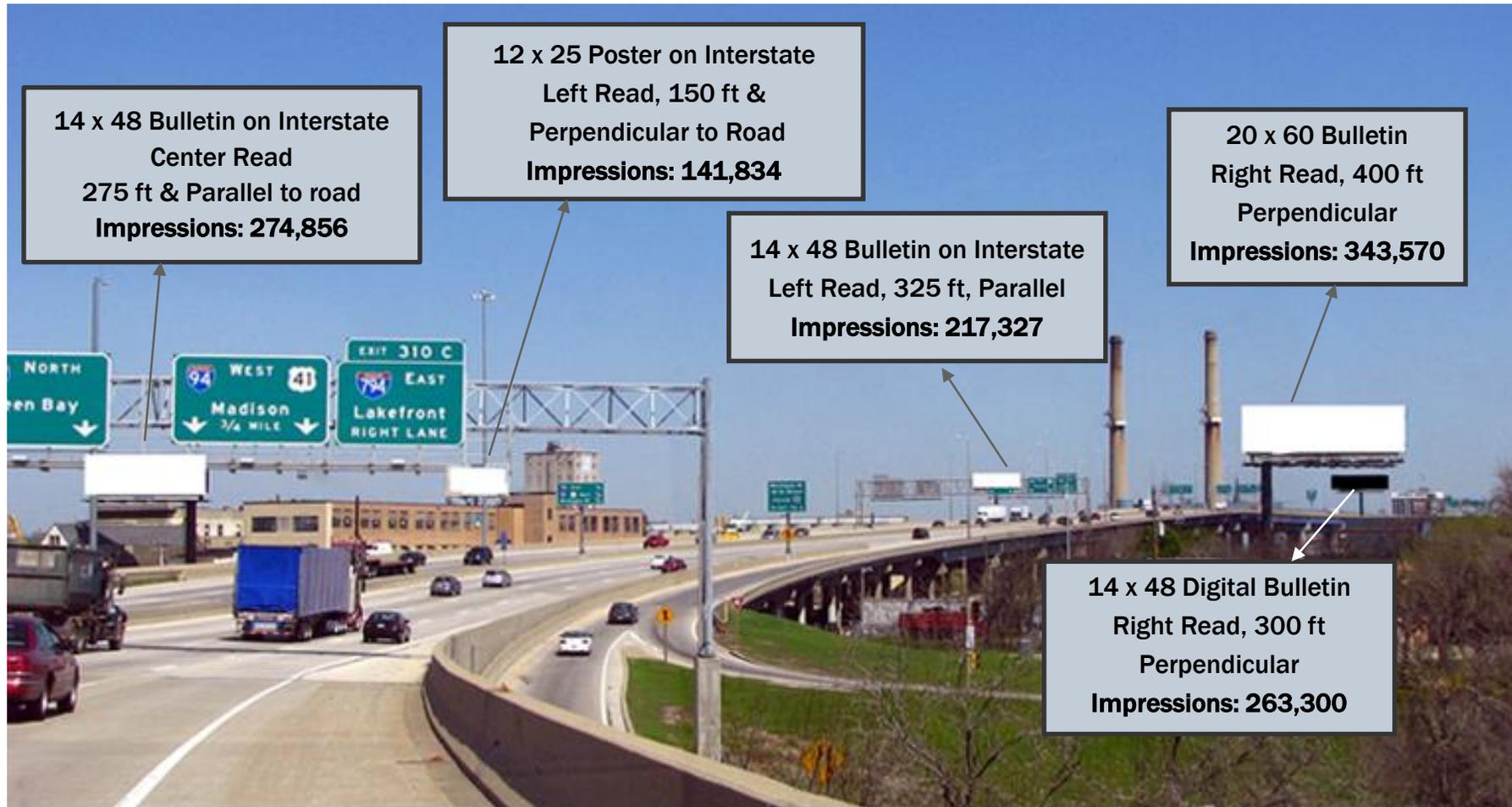
geopath

TODAY

ENHANCED



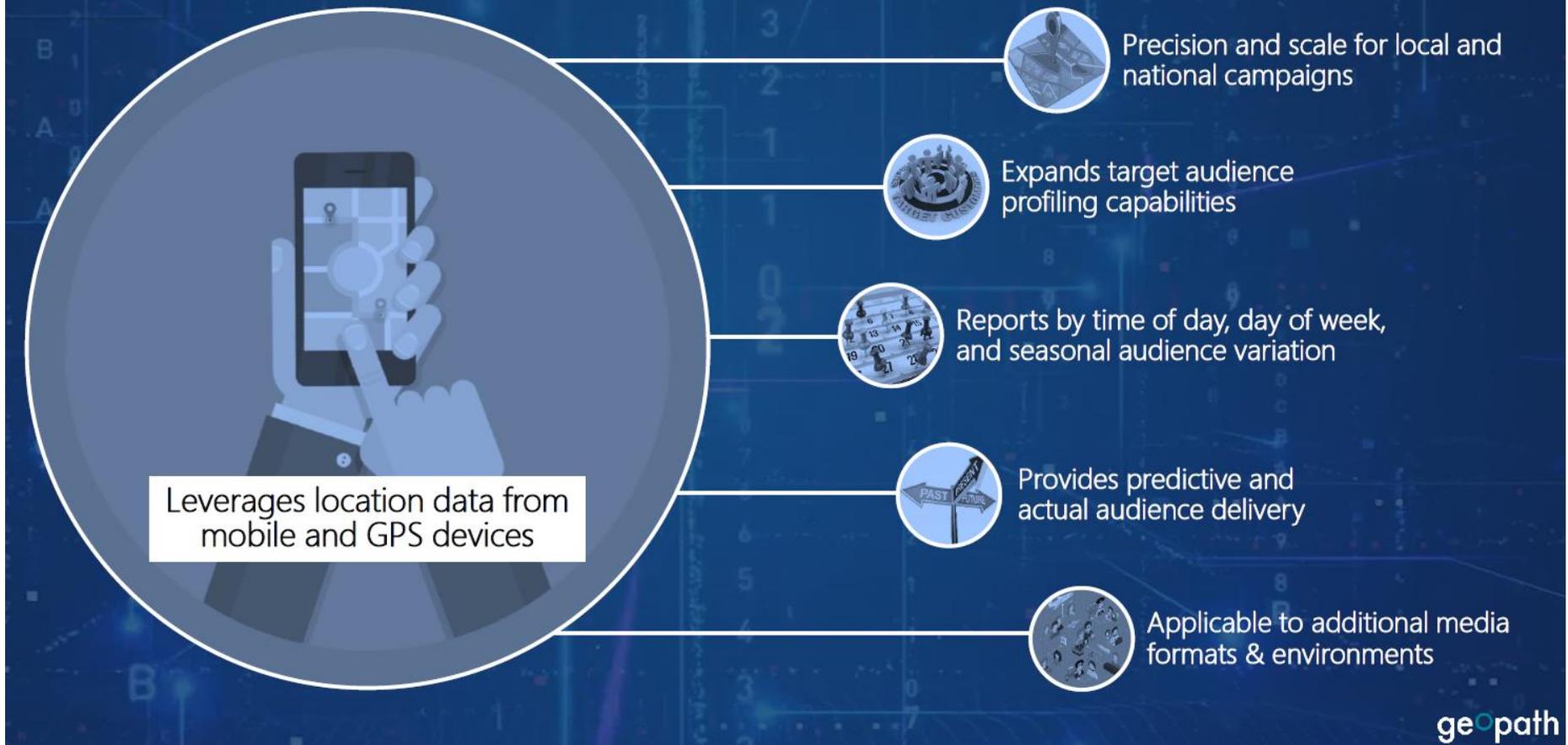
OOH RATINGS – DISTINCT AUDIENCE COMPOSITION



Source: Geopath

geopath

Enhanced Audience Insights



OOH FEATURES AND BENEFITS

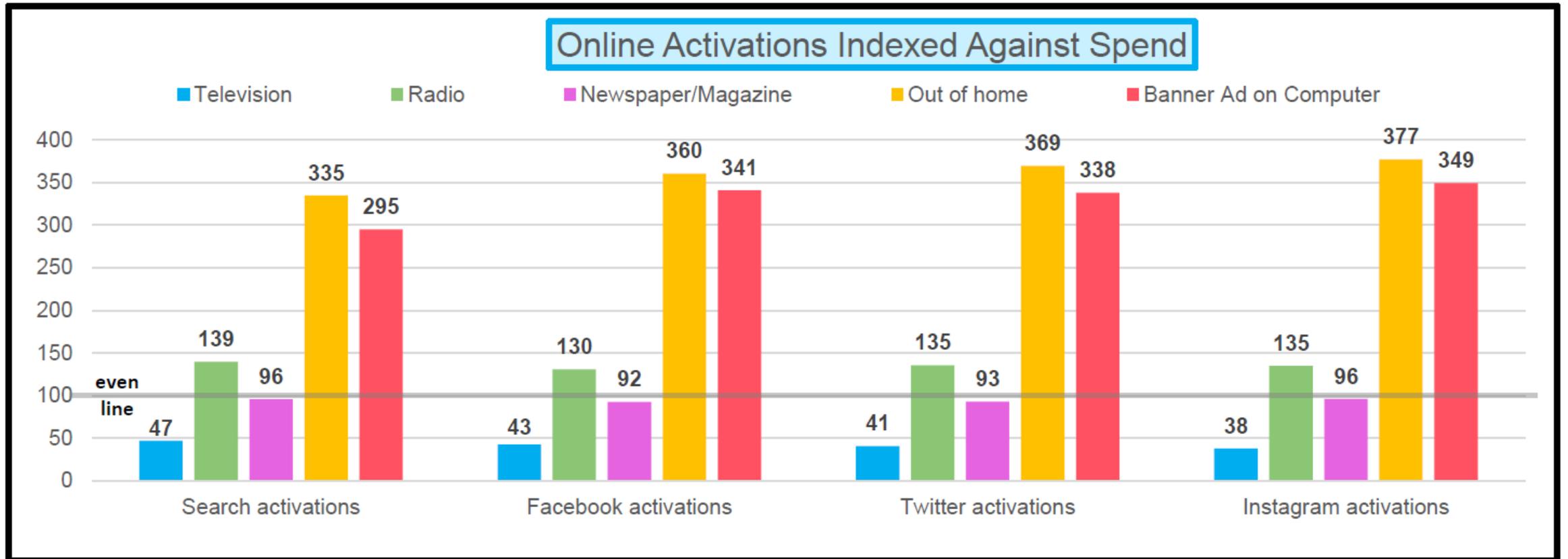
Feature	Benefit
Lower CPMs and CPPs	More exposure for ad dollars spent
Feature	Benefit
Local demographic targets	Minimal wasted exposures
Feature	Benefit
Messages presented in an uncluttered environment	Messages are seen by the consumer and stand out from competitors
Feature	Benefit
A variety of media products, schedules, and weights	A customized media plan that fits budget objectives
Feature	Benefit
A compliment to any media mix	Media objectives are achieved effectively and efficiently
Feature	Benefit
A selling message delivered 24/7 to a mobile audience	A constant message between other media inserts

.....CONVERGENCE



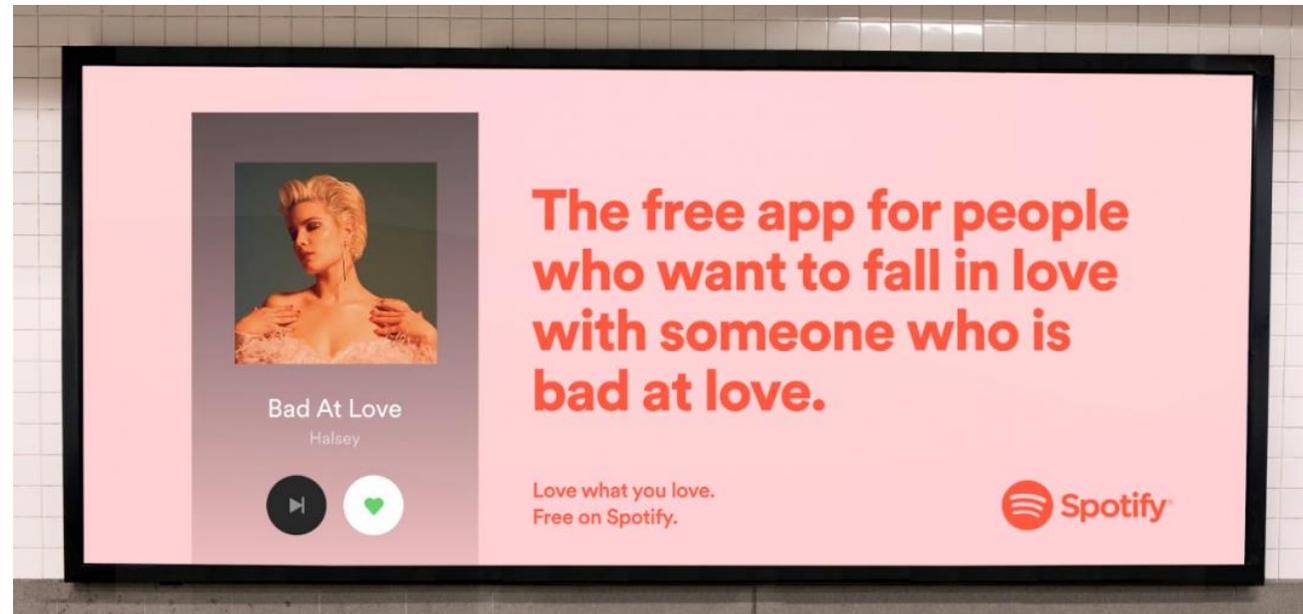
OOH MOST EFFECTIVE IN DRIVING ONLINE ACTIVATION

OOH delivers more online activity per advertising dollar spent compared to other offline media.



Source: Nielsen Base: Adults 18+

FOUR of the top five social media sites and
NINE of the top ten downloaded apps in 2018 advertised in OOH.



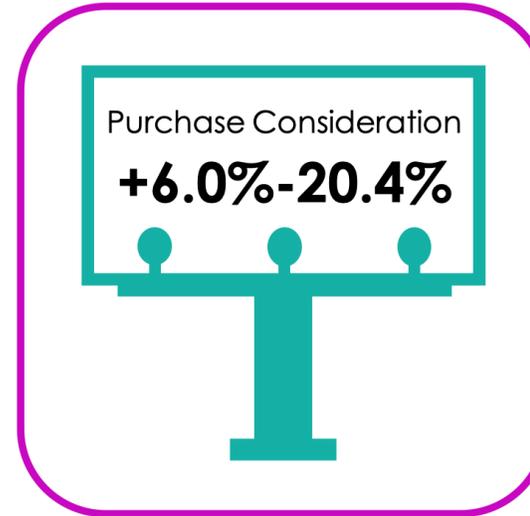
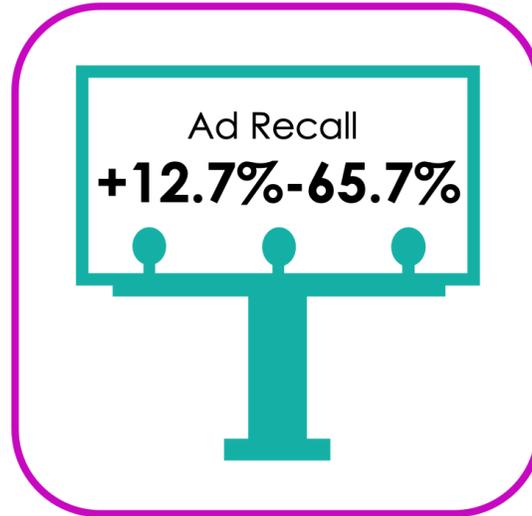
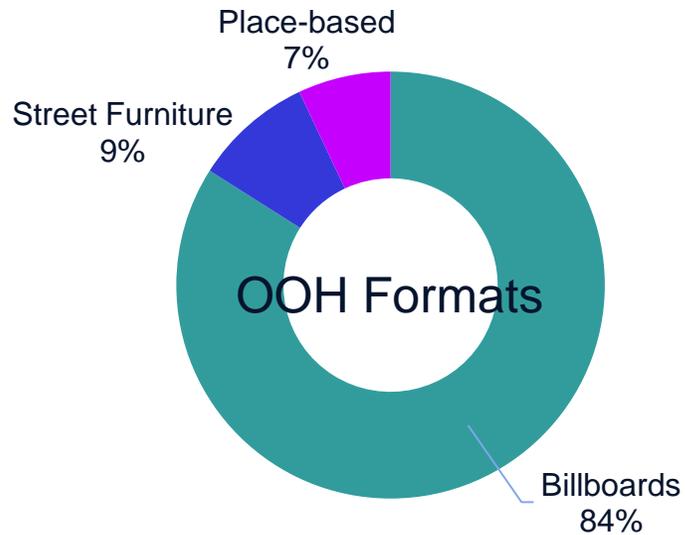
“For us, OOH has become a social channel, and we trust that if the creative is compelling enough, people will do the work of amplification for us.” - Alex Bodman, Spotify global executive creative director

OOH ATTRIBUTION – CASE STUDIES ANALYSIS

45

CASES

OAAA Media
Member Companies



Source: Nielsen Base: Adults 18+

OOH ATTRIBUTION CASE STUDY – NATIONAL GROCER BRAND

DMA's exposed and campaign flight:

Atlanta, GA: 1/5 - 6/27, 2018

Portland, OR: 2/15 - 4/13, 2018

Knoxville, TN: 8/31 - 10/5, 2018



Uplift by DMA

Atlanta, GA: 80%

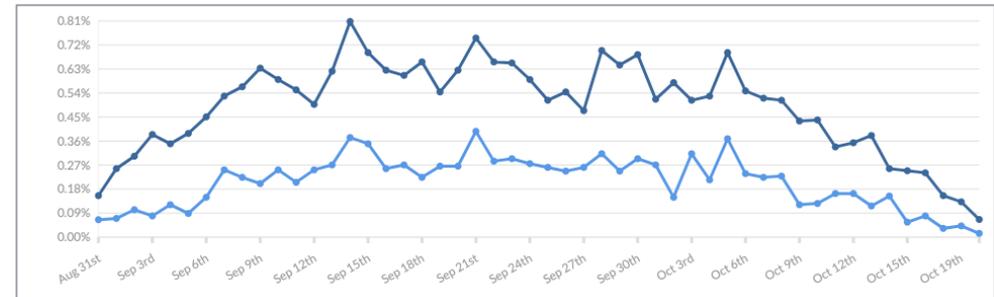
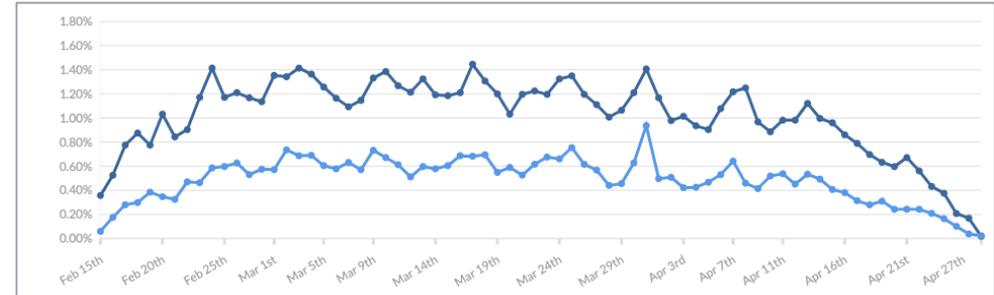
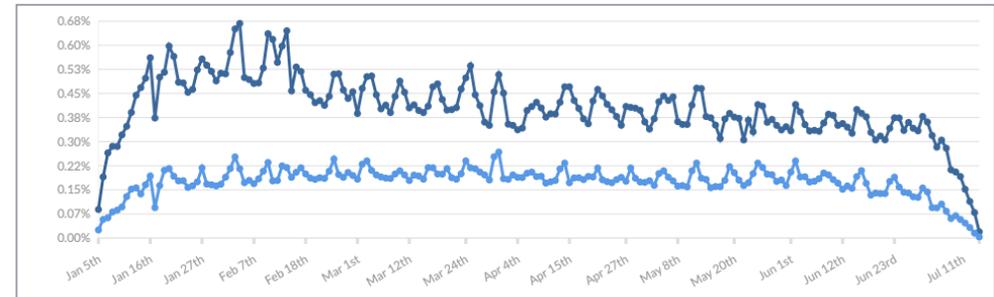
Portland, OR: 78%

Knoxville, TN: 97%

vs Grocery Stores

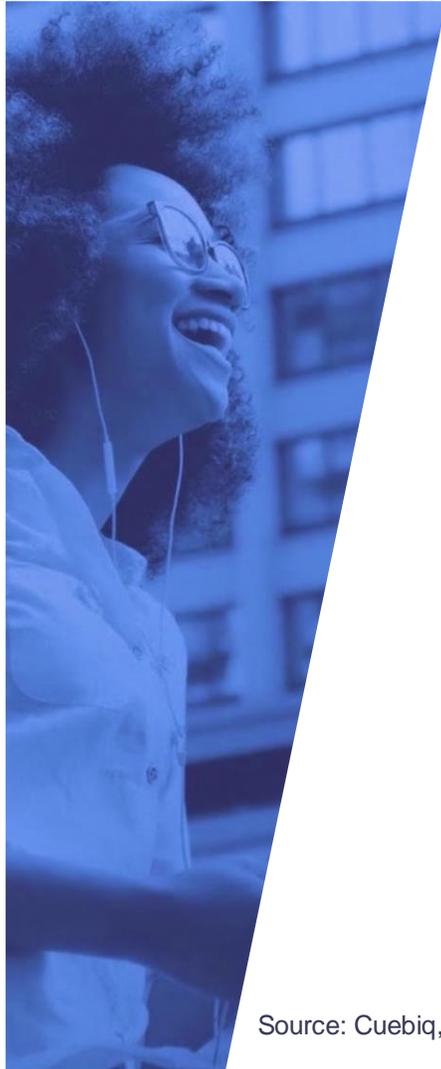
Benchmark: 5-51%

Visit Rate Distribution by DMA



Source: Cuebiq

OOH #1 IN ATTRIBUTION – CUEBIQ NATIONAL BENCHMARKS



OOH is the Most Effective Medium to Drive to Store

Mobile



10-89%
(2018)

vs 19-49%
(2017)

Cross-Device



6-39%
(2018)

vs 17-46%
(2017)

Out Of Home

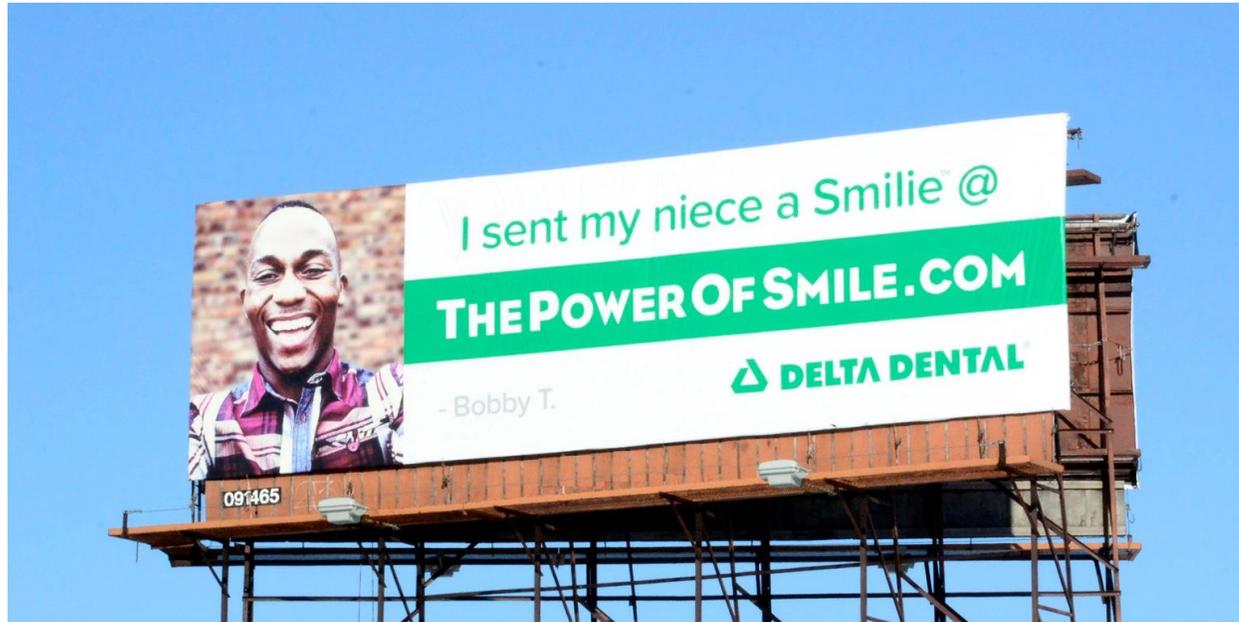


80-120%
(2018)

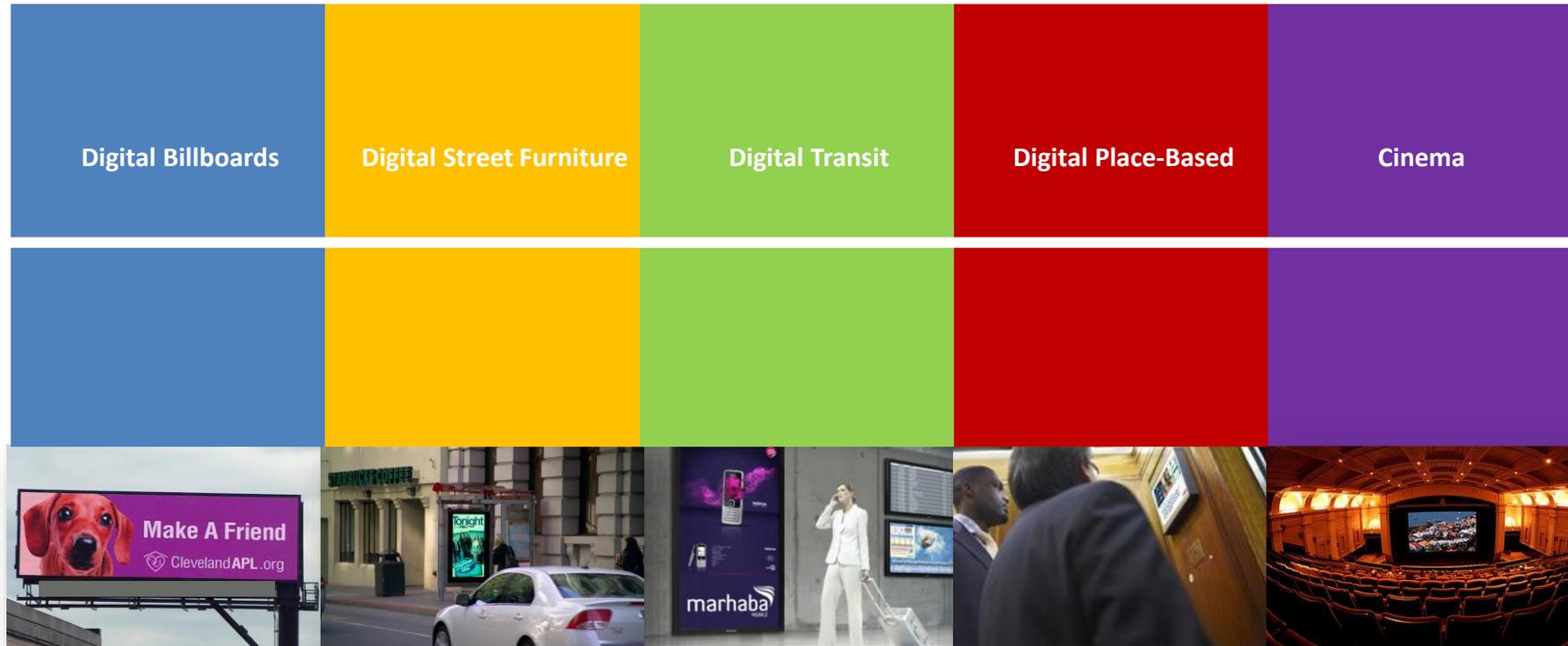
Source: Cuebiq, Attribution Benchmarks Report 2019.



EFFECTIVE - ONLINE ACTIVATION & SALES



EMBRACING CHANGE - DIGITAL OOH CONTINUUM



- Day Parting
- User-Generated Content
- Countdowns
- Live Scores

- Traffic
- Trending Items
- Weather Triggers
- Social Media

DIGITAL OOH – UNPARALLELED CUSTOMIZATION & RELEVANCE

Flexible

- Quick and targeted updates – faster than broadcast or print media
- No production costs or installation charges
- Inventory can be purchased for periods ranging from days to weeks

Immediate

- Digital OOH can be updated in real-time responding to consumer needs



DIGITAL BILLBOARDS ARE EFFECTIVE

ALL TRAVELERS SURVEYED...

1.	...noticed a digital billboard in the PAST MONTH.	75%
2.	...noticed a digital billboard in the PAST WEEK.	60%

PAST MONTH DIGITAL BILLBOARD VIEWERS...

3.	...notice the MESSAGE on the screen MOST OR ALL OF THE TIME.	55%
4.	...noticed DIRECTIONAL digital billboard ads.	37%
5.	...have CHANGED PLANS to visit the store in the ad.	22%
6.	...feel digital billboards STAND OUT MORE than online ads.	71%
7.	...consider digital billboards a good way to learn about NEW BUSINESSES in the area	65%
8.	...agree digital billboard are a good way to learn about SALES and EVENTS	61%
9.	...recalled ADVERTISING on digital boards.	82%
10.	AVERAGE AD RECALL for an INDIVIDUAL digital billboard campaign	42%

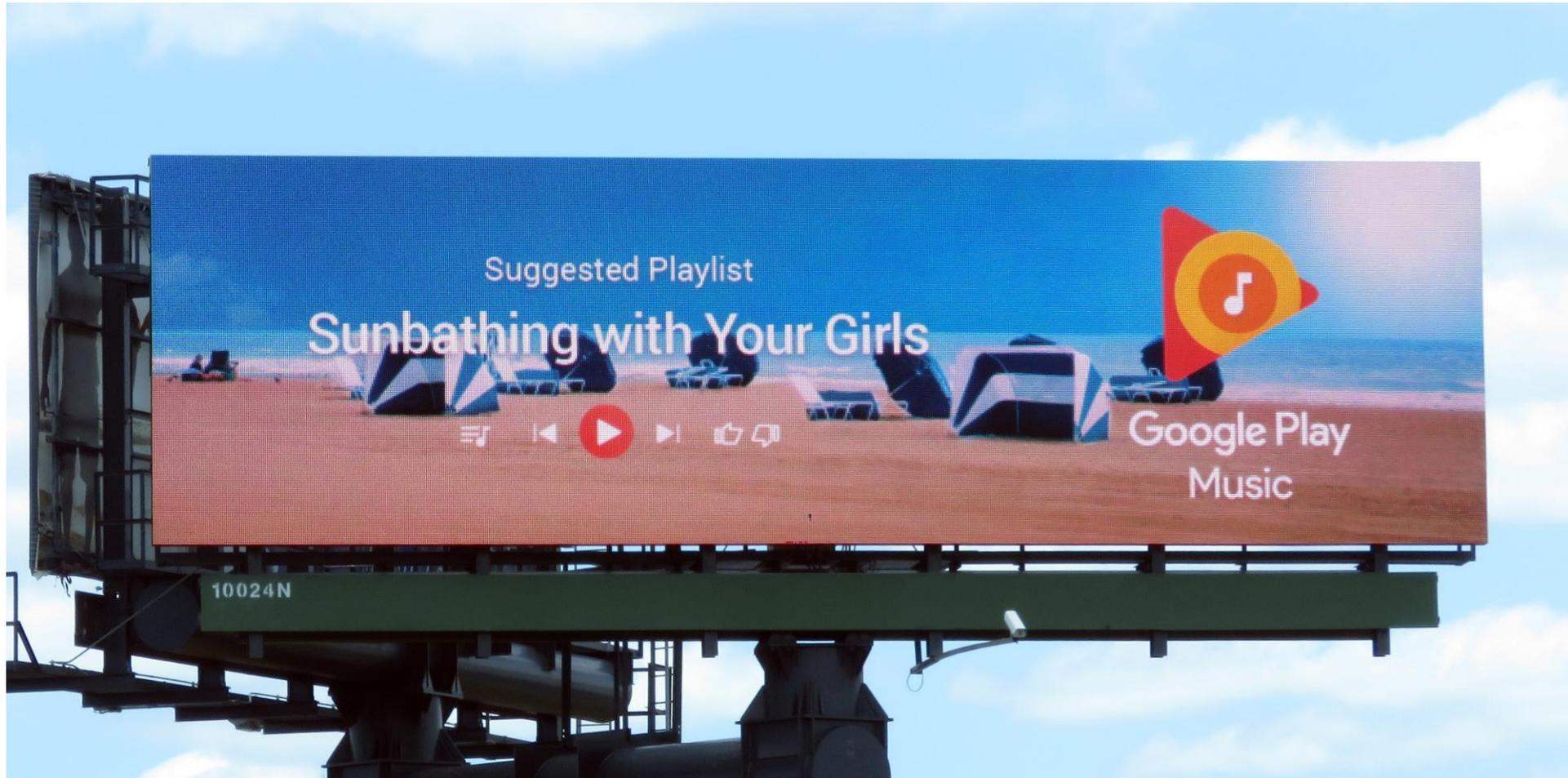
Source: Nielsen

Base: Adults 18+

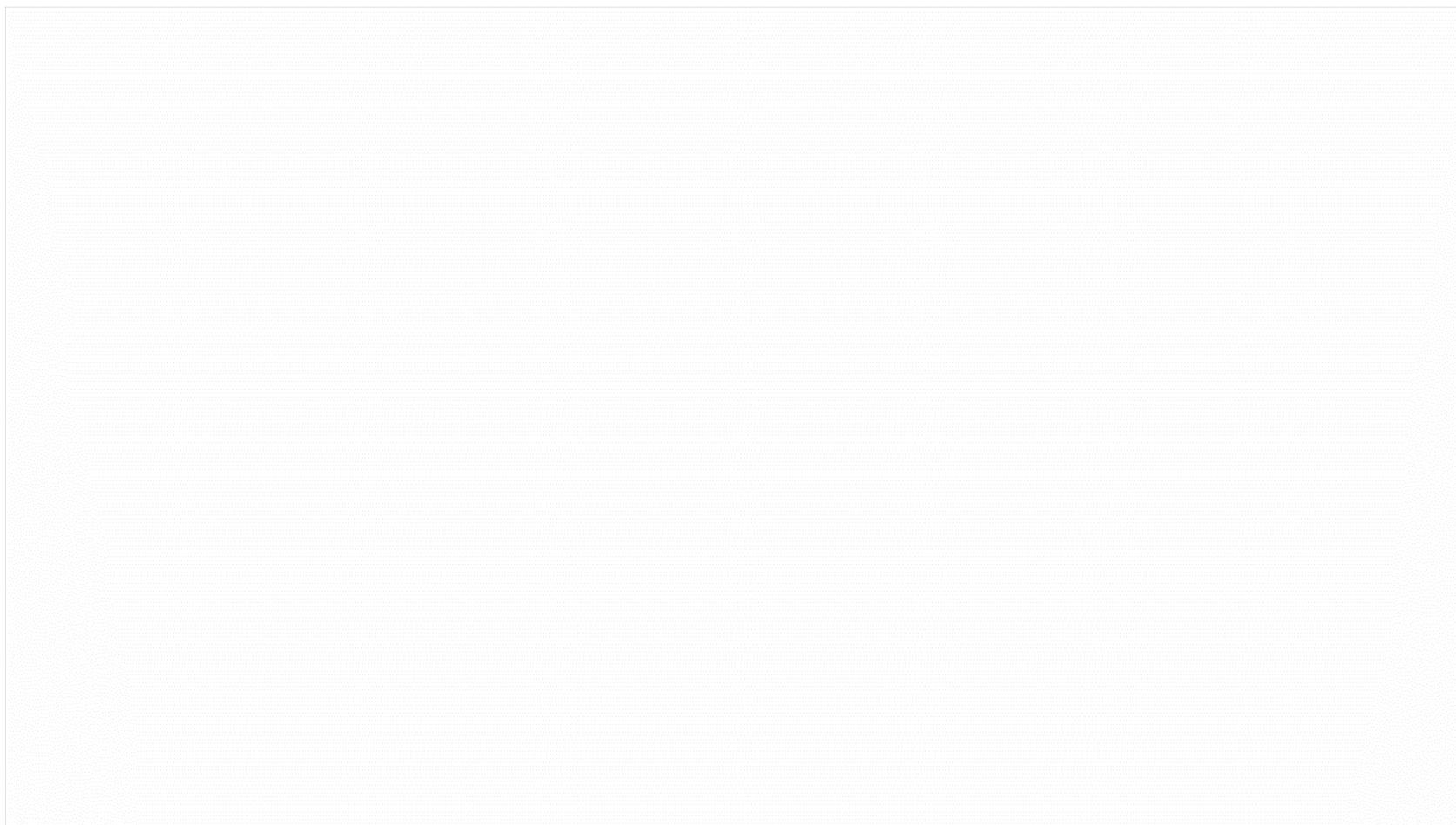
RELEVANT - DELIVER DAY-PART MESSAGES



RELEVANT - CONSUMER GENERATED CONTENT

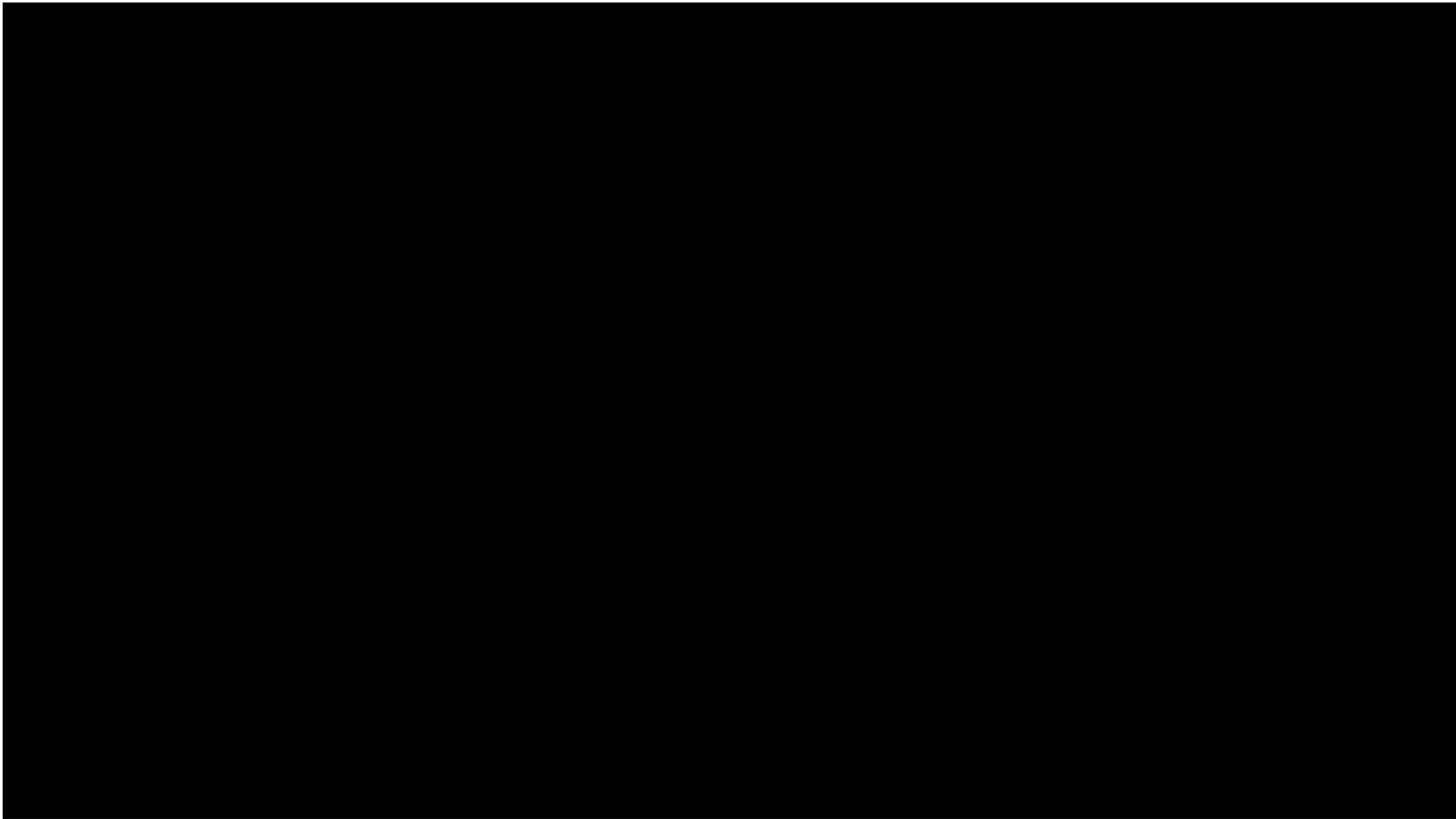


GOOGLE PLAY



INTEGRATED – SHARE IT





RELEVANT – ATMOSPHERIC CONDITIONS



The background of the image is a scenic landscape. In the foreground, there are dark, rugged mountains. In the middle ground, a large, calm lake stretches across the scene. In the background, more mountains are visible under a sky filled with heavy, grey clouds. The overall color palette is muted, with blues, greys, and earthy tones.

JCDecaux

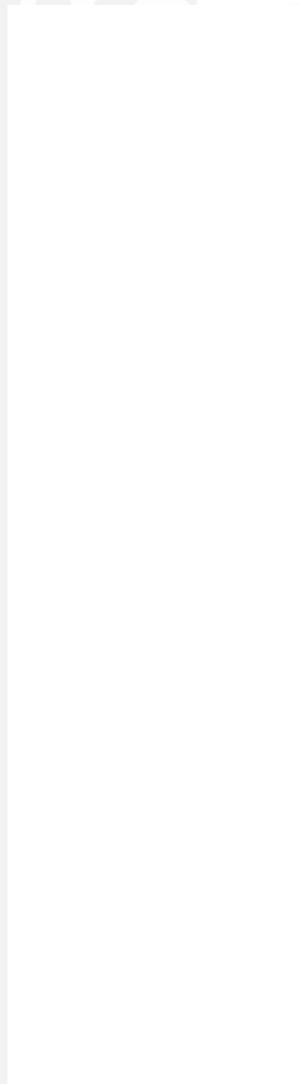
CANADA GOOSE®

DYNAMIC CAMPAIGN

WEATHER TRIGGERS

.....CREATIVE IMPACT





INNOVATIVE - PROXIMITY AND THE MESSAGE



CREATIVE - TEASE & REVEAL INTRIGUE



RELEVANT - GENERATE PARTICIPATION



CREATIVE - ENHANCE IMPACT WITH EXTENSIONS, 3D & WRAPS



CREATIVE – MESSAGE AMPLIFICATION



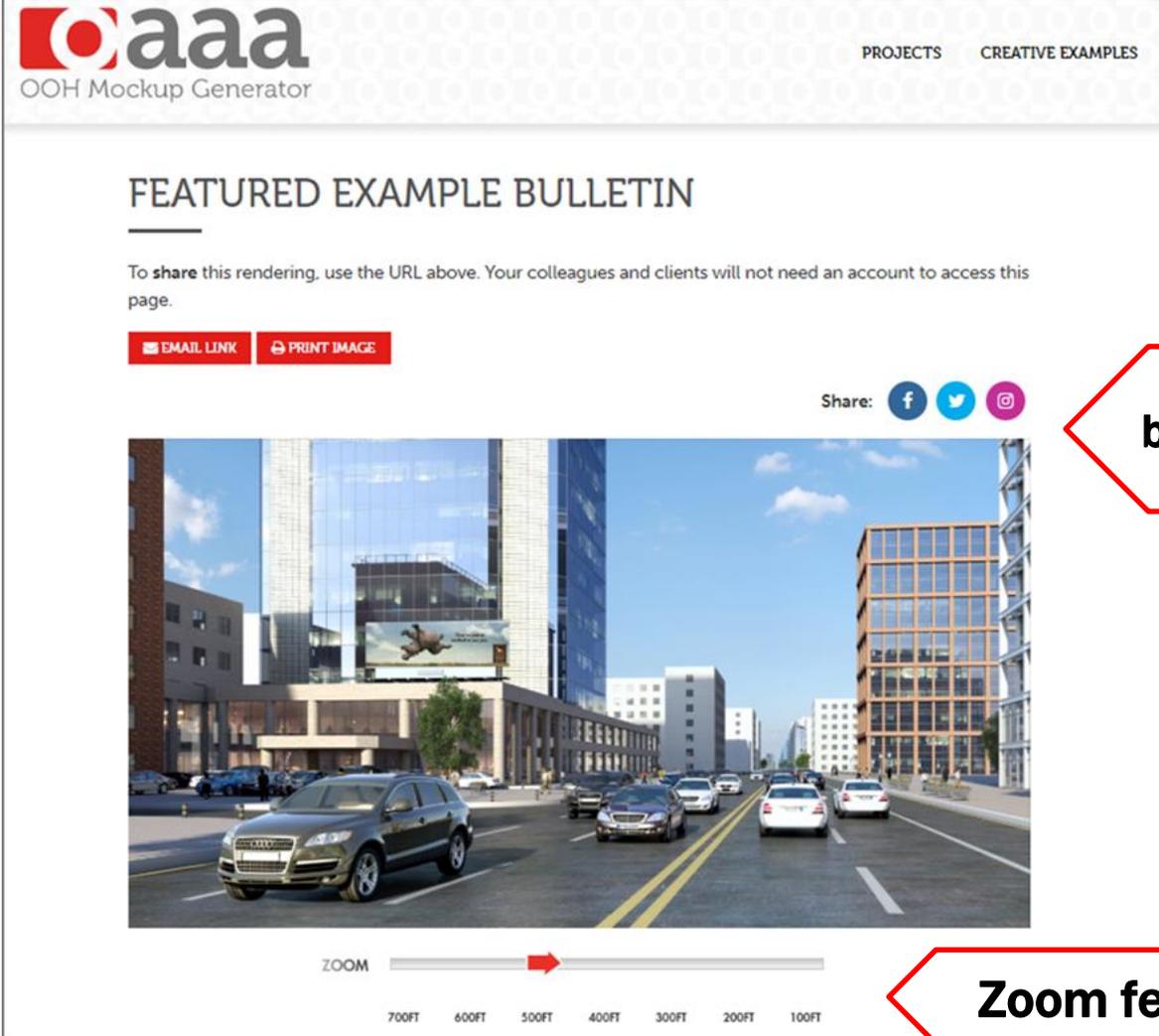
CREATIVE MOCKUP GENERATOR – <https://oohmockupgenerator.oaaa.org/>

OOH Formats:

- Bulletin
- Poster
- Custom Extension
- Wall
- Bus
- Bus Shelter
- Taxi
- Mobile Billboard
- Transit Station
- Shopping Mall
- Airport

OOH Environment Views:

- Highway
- Urban
- Suburban
- Rural

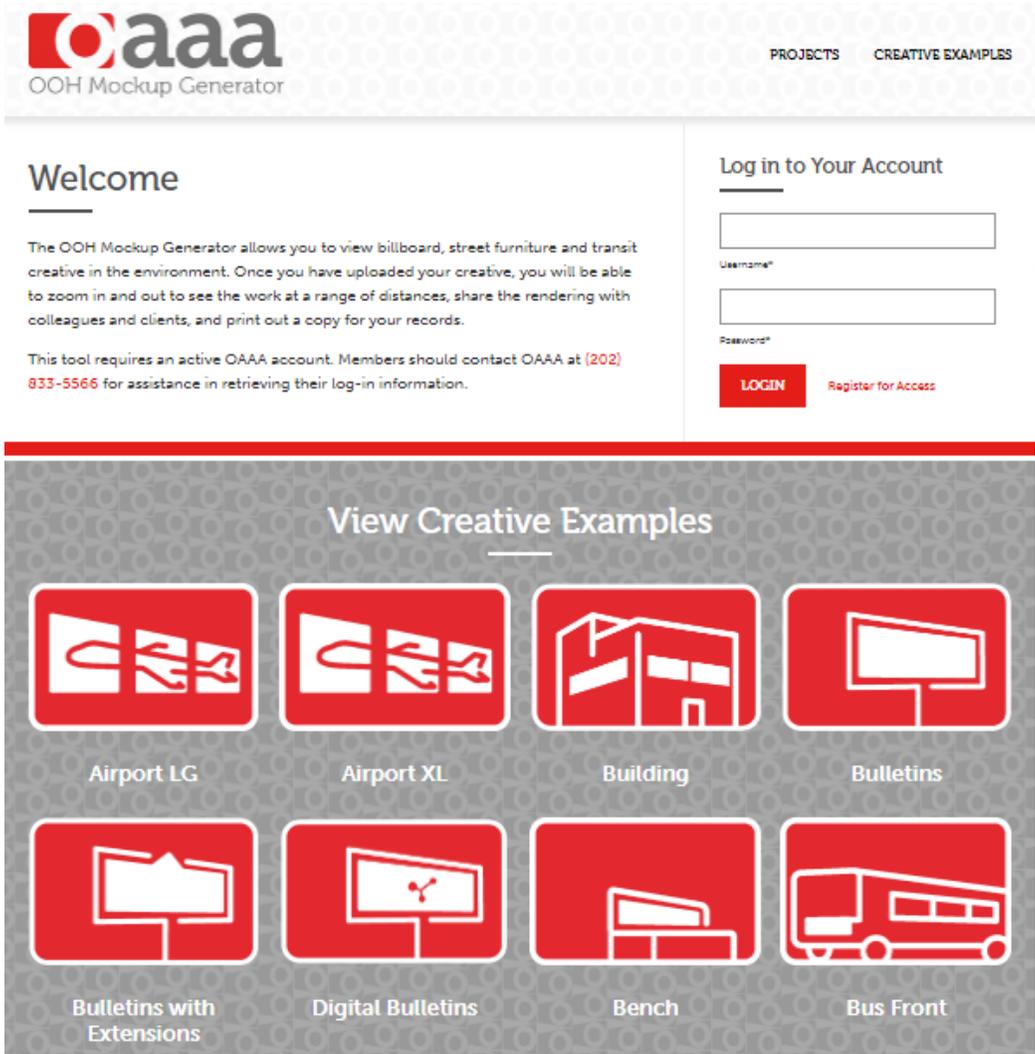


The screenshot shows the website interface for the OOH Mockup Generator. At the top left is the 'aaa OOH Mockup Generator' logo. To the right are links for 'PROJECTS' and 'CREATIVE EXAMPLES'. The main heading is 'FEATURED EXAMPLE BULLETIN'. Below this is a text block: 'To share this rendering, use the URL above. Your colleagues and clients will not need an account to access this page.' There are two buttons: 'EMAIL LINK' and 'PRINT IMAGE'. Below these are social media share icons for Facebook, Twitter, and Instagram. The central image is a 3D rendering of a city street with a billboard on a building. At the bottom of the image is a 'ZOOM' slider with a red arrow pointing to the right, and a scale from 700FT to 100FT.

Renderings can be emailed directly to clients

Zoom feature

CREATIVE MOCKUP GENERATOR – <https://oohmockupgenerator.oaaa.org/>



The screenshot shows the website's header with the OAAA logo and navigation links for 'PROJECTS' and 'CREATIVE EXAMPLES'. Below the header, there is a 'Welcome' section with a brief description of the tool's capabilities and a 'Log in to Your Account' section with input fields for 'Username*' and 'Password*', a 'LOGIN' button, and a 'Register for Access' link. A 'View Creative Examples' section features a grid of eight red icons representing different OOH advertising formats: Airport LG, Airport XL, Building, Bulletins, Bulletins with Extensions, Digital Bulletins, Bench, and Bus Front.

• Free to use
• One time registration

Over 60,000 uses
since launch

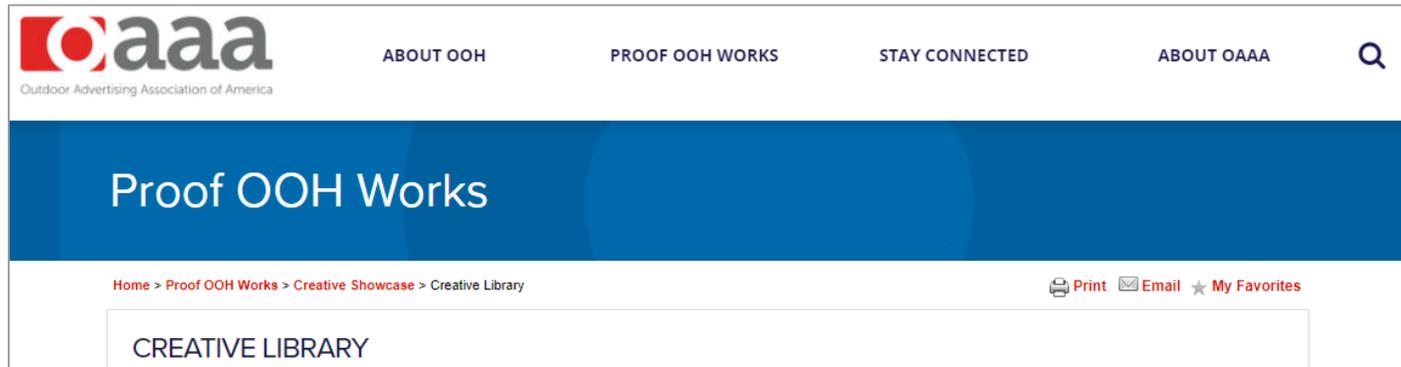
OOH RESOURCES TO HELP YOU

OAAA.org

Creative Library – search by advertiser and product category, thousands of examples

Creative Testing Tool – FREE

Marketing Research – complete studies on flash drive



www.obieawards.org

OOH RESOURCES TO HELP YOU



Out of Home Advertising Association of America

OOH MEDIA LOCATOR OOH DIRECTORY Store | Steven Nicklin



ABOUT OOH

PROOF OOH WORKS

STAY CONNECTED

ABOUT OAAA

OAAA OOH Media Locator by:

- CBSA
- DMA
- Format
- Media Company (with direct link)
- Export search results in Excel

Over 47,000 uses since launch

Home > About OOH > OOH Basics > OOH Media Locator

Print Email My Favorites

OOH MEDIA LOCATOR

FIND AN OOH MEDIA COMPANY

The OOH Media Locator has multi-level search capabilities. Select a CBSA or DMA market and a media category or a specific format if you want to further refine your search.

Should you experience any difficulties with the OOH Media Locator, please clear your browser cache. If issues persist, please contact OAAA at (202) 833-5566 for immediate resolution.

SEARCH BY:

CBSA

DMA

Operating DMAs

- Abilene / Sweetwater TX
- Albany / Schenectady / Troy NY
- Albany GA
- Albuquerque / Santa Fe NM
- Alexandria LA
- Alpena MI
- Amarillo TX
- Anchorage AK

Category

- Billboards
- Street Furniture
- Transit
- Place-Based OOH
- Select all OOH Categories and Formats

Choose Format

- Digital Bulletins
- Digital Posters
- Digital Spectaculars
- Printed Bulletins
- Printed Junior Posters
- Printed Posters
- Printed Spectaculars
- Printed Wall Murals

Select/Deselect All

Search

Clear Filters

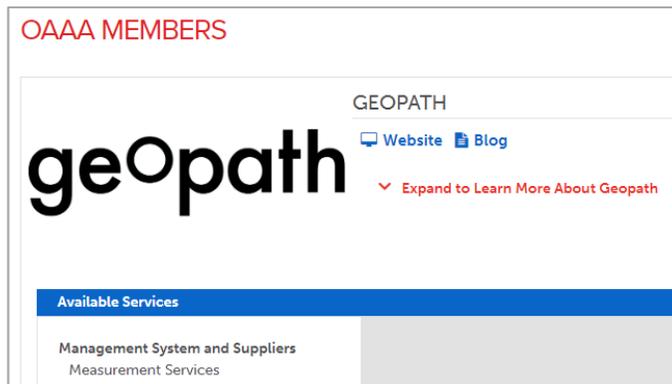
Export

OOH RESOURCES TO HELP YOU

OAAA OOH Tech Locator:

- Transactional Systems
- Management Systems and Suppliers
- Data Aggregation Methods and Suppliers

Includes over **165** technology companies



OAAA MEMBERS

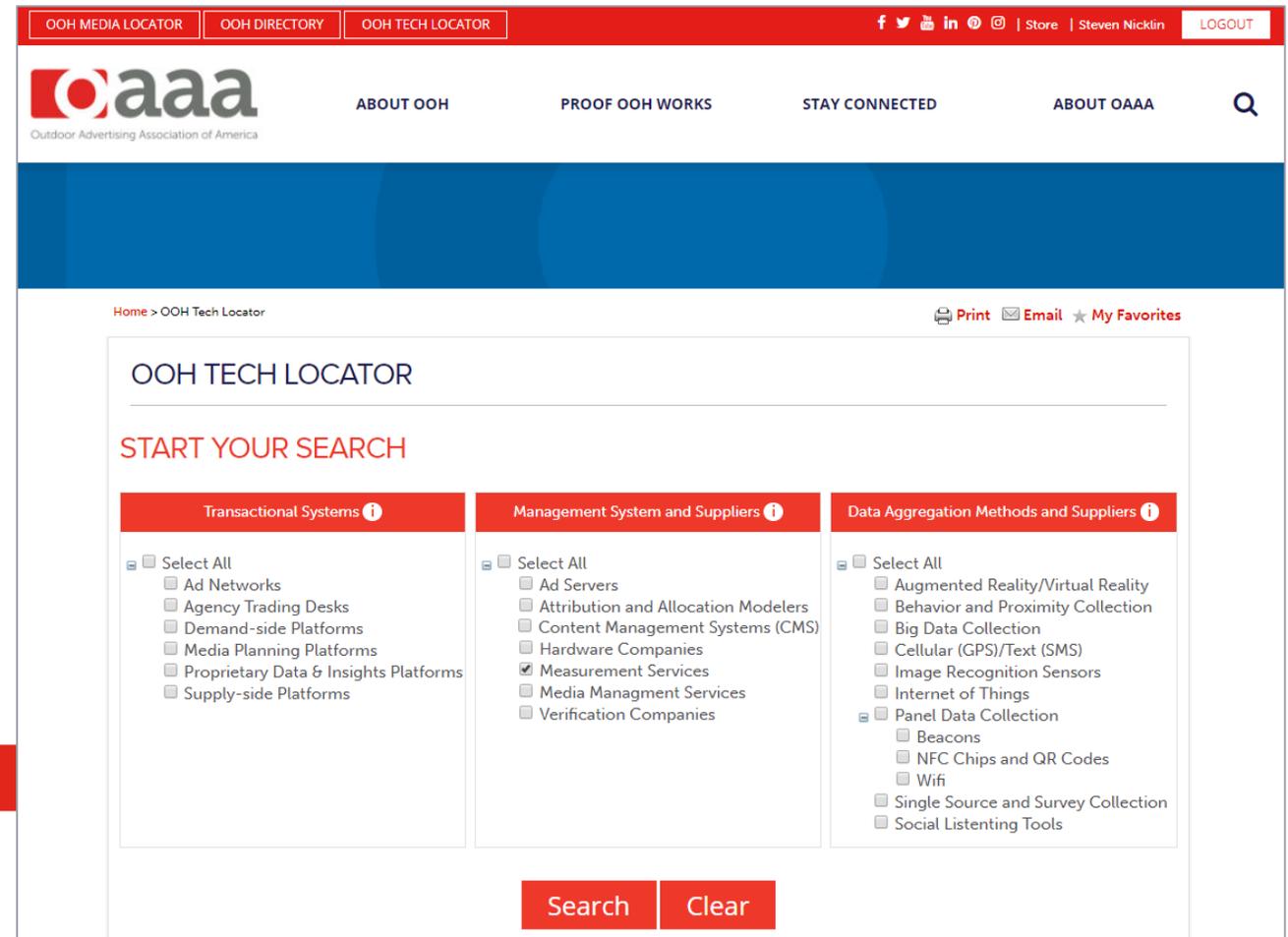
GEOPATH

geopath Website Blog

Expand to Learn More About Geopath

Available Services

- Management System and Suppliers
- Measurement Services



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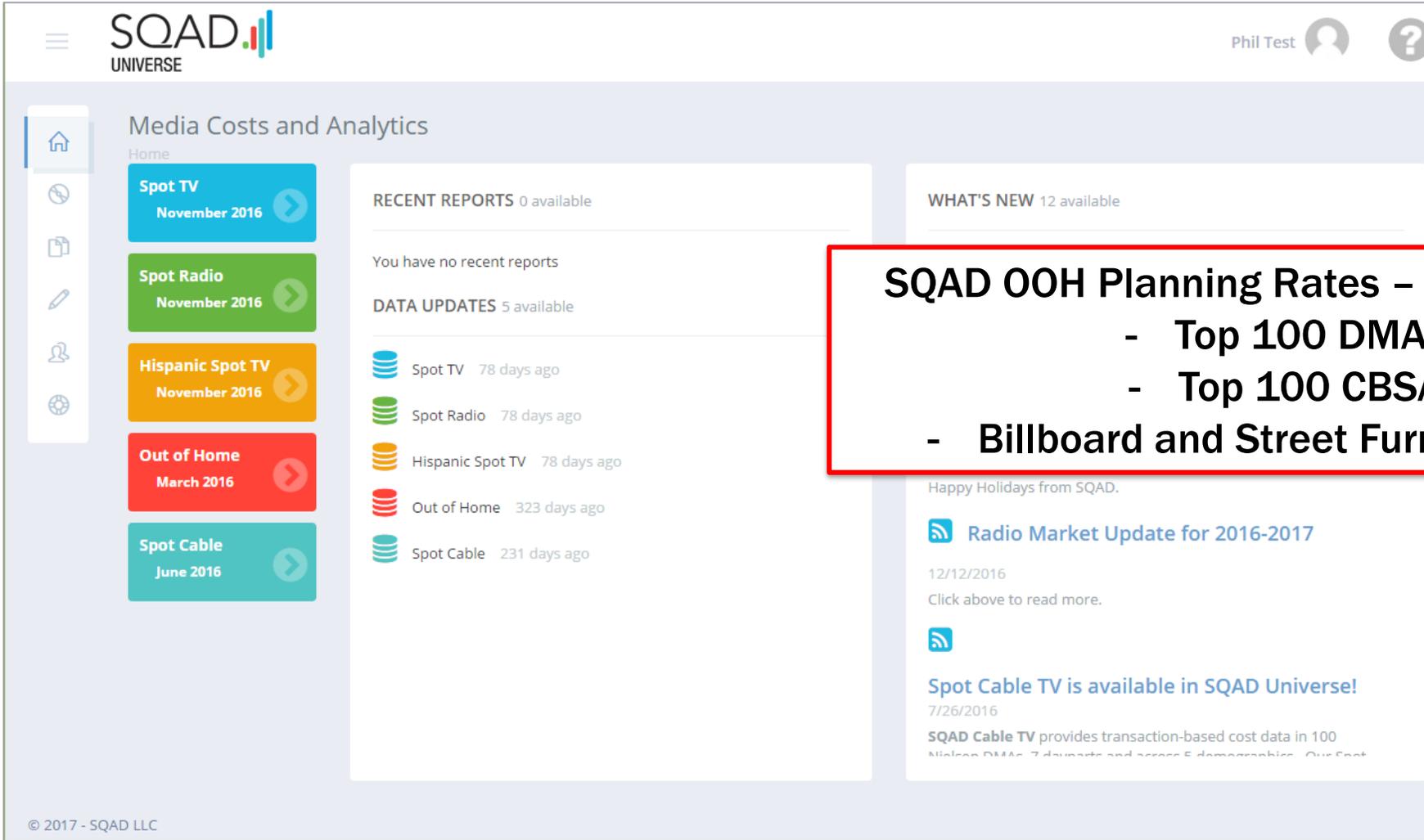
OOH TECH LOCATOR

START YOUR SEARCH

Transactional Systems <i>i</i>	Management System and Suppliers <i>i</i>	Data Aggregation Methods and Suppliers <i>i</i>
<input type="checkbox"/> Select All <ul style="list-style-type: none"><input type="checkbox"/> Ad Networks<input type="checkbox"/> Agency Trading Desks<input type="checkbox"/> Demand-side Platforms<input type="checkbox"/> Media Planning Platforms<input type="checkbox"/> Proprietary Data & Insights Platforms<input type="checkbox"/> Supply-side Platforms	<input type="checkbox"/> Select All <ul style="list-style-type: none"><input type="checkbox"/> Ad Servers<input type="checkbox"/> Attribution and Allocation Modelers<input type="checkbox"/> Content Management Systems (CMS)<input type="checkbox"/> Hardware Companies<input checked="" type="checkbox"/> Measurement Services<input type="checkbox"/> Media Management Services<input type="checkbox"/> Verification Companies	<input type="checkbox"/> Select All <ul style="list-style-type: none"><input type="checkbox"/> Augmented Reality/Virtual Reality<input type="checkbox"/> Behavior and Proximity Collection<input type="checkbox"/> Big Data Collection<input type="checkbox"/> Cellular (GPS)/Text (SMS)<input type="checkbox"/> Image Recognition Sensors<input type="checkbox"/> Internet of Things<input type="checkbox"/> Panel Data Collection<ul style="list-style-type: none"><input type="checkbox"/> Beacons<input type="checkbox"/> NFC Chips and QR Codes<input type="checkbox"/> Wifi<input type="checkbox"/> Single Source and Survey Collection<input type="checkbox"/> Social Listening Tools

Search | Clear

OOH RESOURCES TO HELP YOU



The screenshot shows the SQAD UNIVERSE dashboard. The top navigation bar includes the SQAD UNIVERSE logo, a user profile for Phil Test, and a help icon. The main content area is titled "Media Costs and Analytics" and features a sidebar with navigation icons. The dashboard displays several key metrics and reports:

- Spot TV** (November 2016)
- Spot Radio** (November 2016)
- Hispanic Spot TV** (November 2016)
- Out of Home** (March 2016)
- Spot Cable** (June 2016)

Under the "RECENT REPORTS" section, it states "0 available" and "You have no recent reports". The "DATA UPDATES" section shows 5 available updates:

- Spot TV - 78 days ago
- Spot Radio - 78 days ago
- Hispanic Spot TV - 78 days ago
- Out of Home - 323 days ago
- Spot Cable - 231 days ago

The "WHAT'S NEW" section lists 12 available items, including a "Radio Market Update for 2016-2017" dated 12/12/2016 and a "Spot Cable TV is available in SQAD Universe!" announcement dated 7/26/2016.

SQAD OOH Planning Rates – Now Available

- Top 100 DMAs
- Top 100 CBSA
- Billboard and Street Furniture Rates

OOH RESOURCES TO HELP YOU

- Planning for OOH Media Guide
- OOH Creative Primer
- Interactive OOH Primer
- Digital OOH Guide



THANK YOU!

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