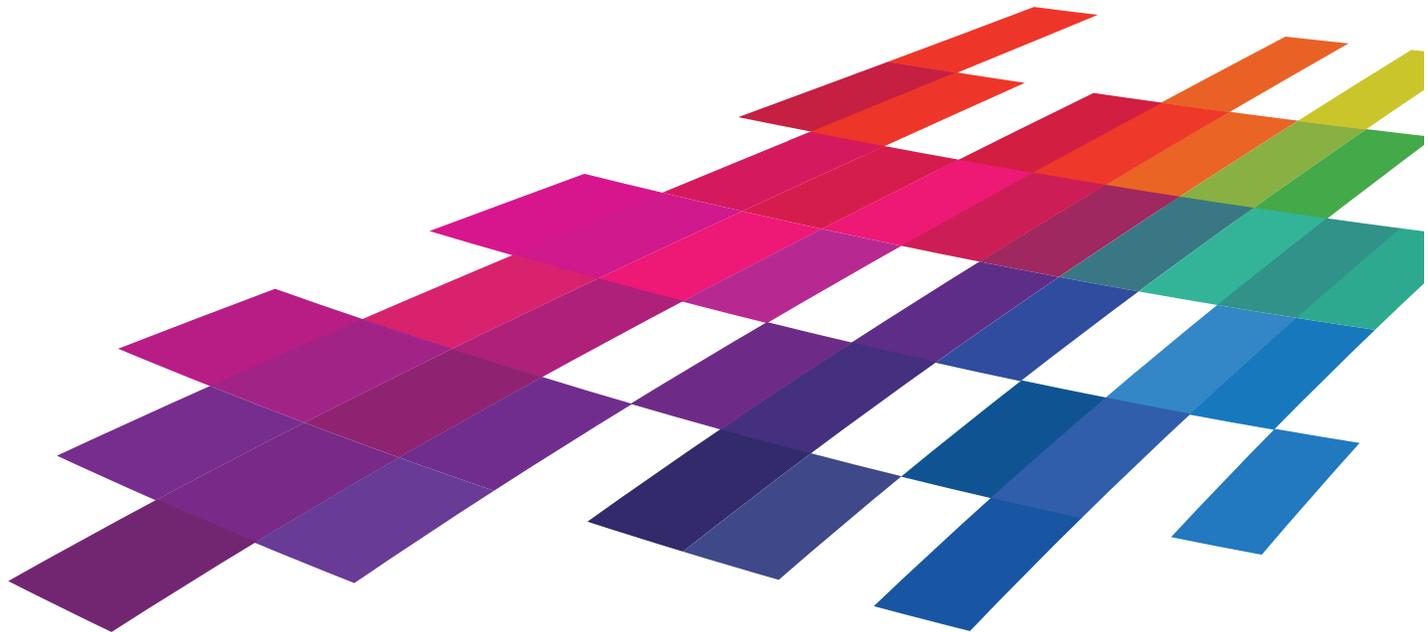
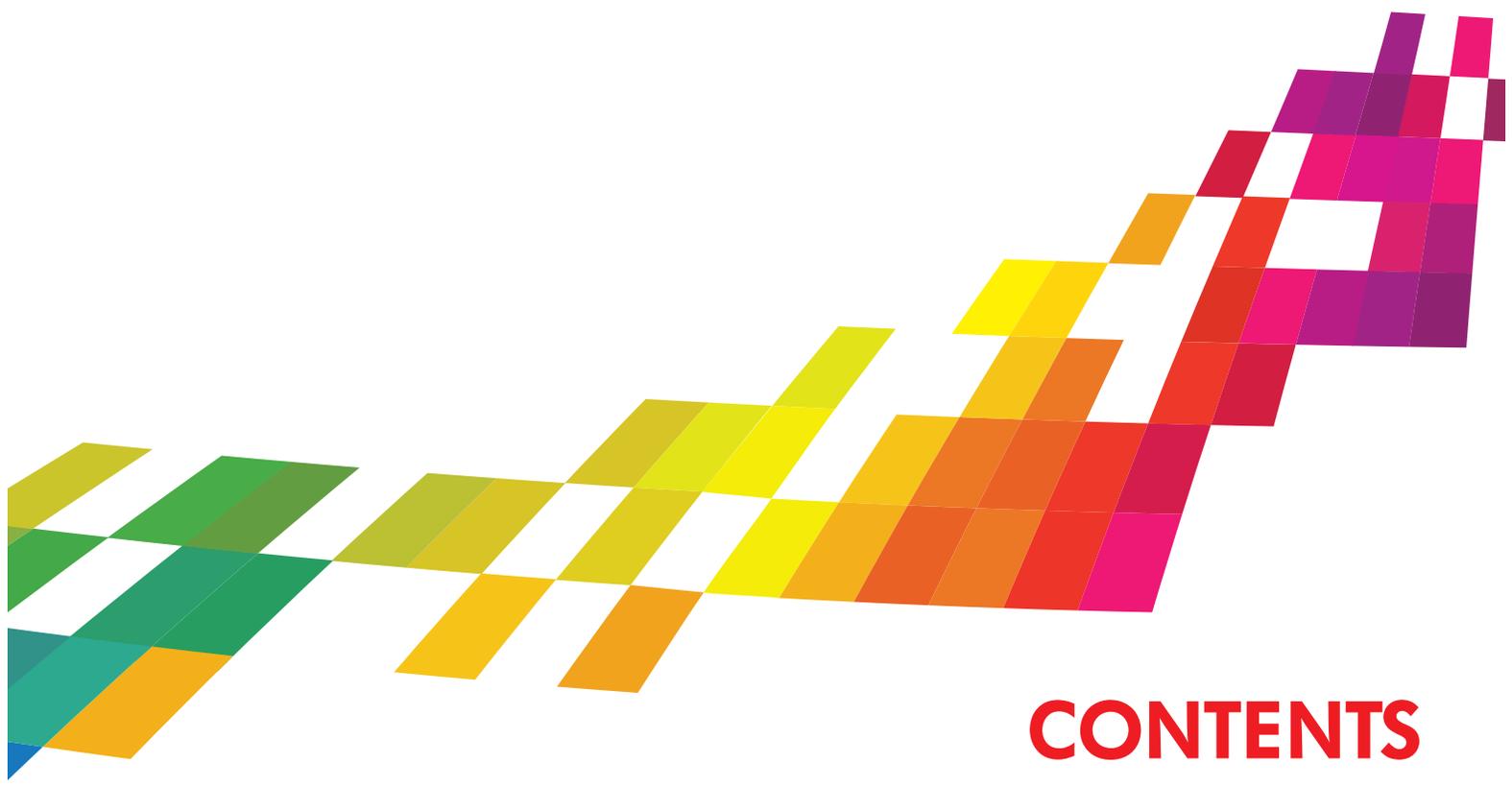


OUT OF HOME ADVERTISING TODAY

TAKE YOUR MESSAGE
FURTHER

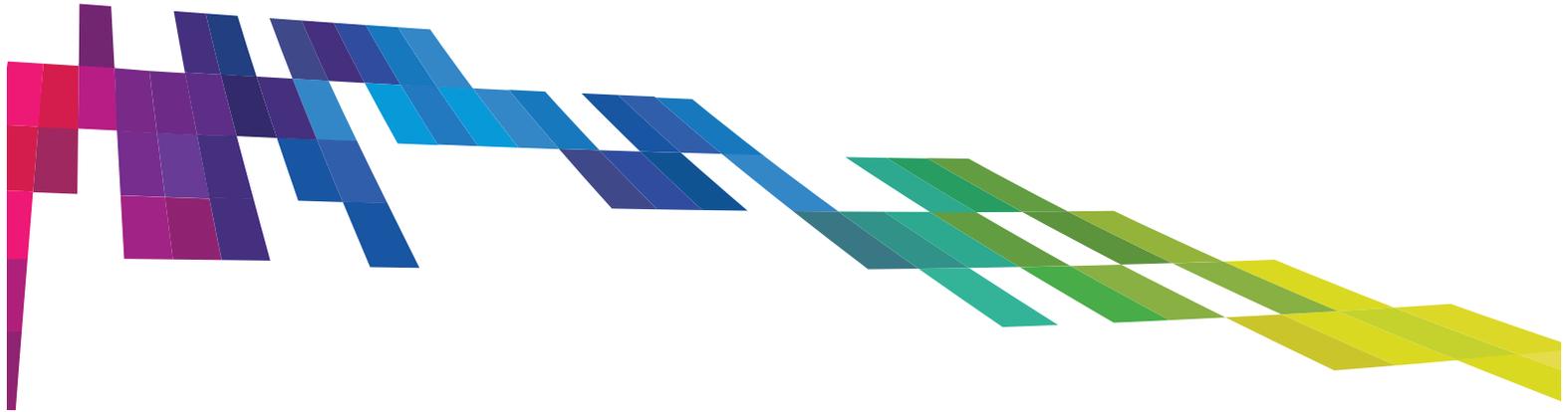


Take another look.

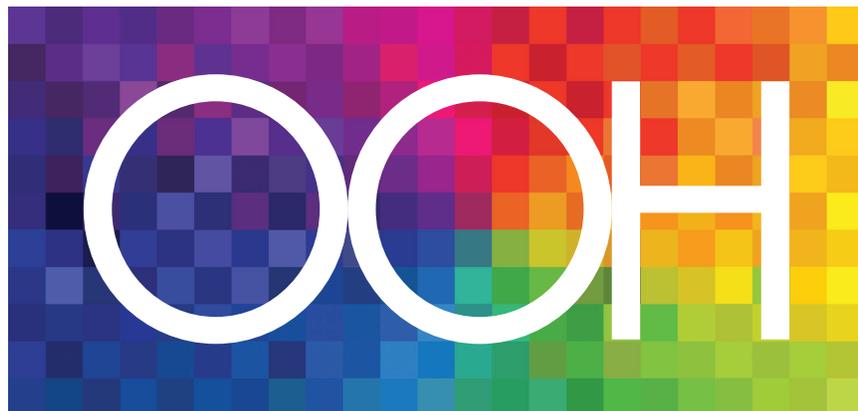


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OUT OF HOME ADVERTISING



TAKE YOUR MESSAGE FURTHER

Out of home advertising (“OOH”) is one of the oldest media in existence, dating back to circus posters and horse-drawn streetcar advertising in the mid-1800’s. Since those early days, OOH has had a remarkable run, because OOH has constantly evolved to adapt to new markets, new formats, new technology, and new opportunities.

Today’s OOH may not be what you think it is. Over the past five years, OOH has been putting innovation to work in all parts of its business, to help advertisers take their message further.

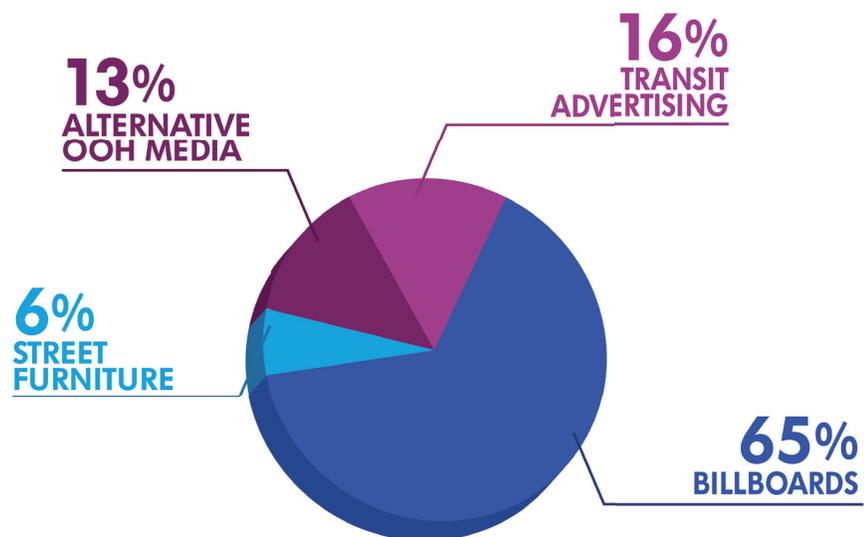
Today’s OOH is a dynamic mix of billboards, digital displays, transit, street furniture, cinema, and place-based media that surround and immerse consumers during the 70% of the day they spend away from home.

In an age of ever-increasing media fragmentation, OOH is more relevant and more powerful than ever. OOH reaches people no matter how they consume their media, making them stop, notice, and buy. No other advertising format is more ever-present, or more creatively versatile.

When OOH is combined with other advertising in an integrated media plan, it is proven to extend reach, amplify a campaign, and drive consumers to engage with brands online and in-store. Maybe this is why OOH is one of the fastest-growing advertising media around.

If you haven’t considered out of home lately, take another look at today’s OOH. You may be surprised by what you see.

OOH ADVERTISING CATEGORIES BY REVENUE



WHAT OOH

INNOVATION

OOH is laser-focused on innovation to keep pace with where advertising and the consumer are headed. OOH is innovating in all parts of its business to improve the customer experience, while delivering ever more engaging, immersive, and effective connections with today's consumers.

From digital billboards to mobile and social media integration; from eco-friendly materials and lighting to more customer-focused business practices; from smarter, more strategic proposals to the new, game-changing TAB OOH ratings system -- today's OOH is embracing innovation in all its forms to help advertisers take their message further.

UBIQUITY

Today's OOH goes where most other media can't go, driving awareness, engagement, and transactions with brands. OOH's wide range of advertising formats surround and immerse hard-to-reach consumers away from home, where they spend 70% of their waking hours. OOH is everywhere consumers are.

OOH combines physical presence, prime locations, and immediacy, in the least cluttered advertising environment available. OOH reaches consumers closest to the point of purchase and delivers the right message to the right consumer at the right time and place.

CREATIVE IMPACT

OOH is a uniquely creative medium. When executed well, OOH offers virtually unlimited creative potential and impact. A wide range of sizes and formats offer a blank canvas for brands to deliver uniquely disruptive and engaging consumer experiences.

The role of creativity in driving OOH's effectiveness is often underestimated. As an industry, OOH is dedicated to elevating out of home design, whether it's for a small local billboard campaign or a big, national effort. It is no secret that great design and creative storytelling lead to better results. Every year, the OBIE Award winners stretch the boundaries of what's possible and demonstrate how great creative makes great business sense.



STANDS FOR



Surrounding Consumers



VISUAL STORYTELLING



IMPACT



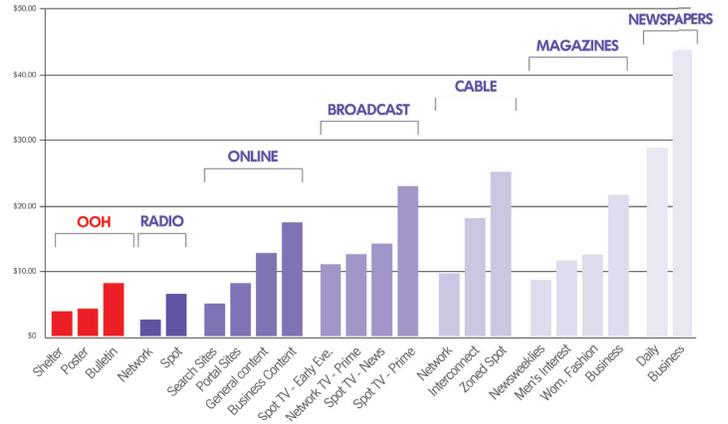
BREVITY



LOW CPM

Research studies have repeatedly shown that OOH significantly lowers the cost of advertising. To reach 1,000 people, online can cost up to \$17.50 per thousand impressions, magazines can cost up to \$21.00 per thousand, and spot broadcast or cable can cost \$22.00 - \$25.00 per thousand. At \$3.38 - \$8.65 per thousand impressions, OOH delivers the same audience at significantly lower cost. Only radio comes anywhere close.

CPM COMPARISONS - MAJOR MEDIA



Source: Wells Fargo, Nielsen

HIGH ROI

A recent global econometrics study proved that OOH delivers a high return on investment. For every \$1 spent on OOH advertising, \$2.80 in sales result.

ADVERTISING ROI

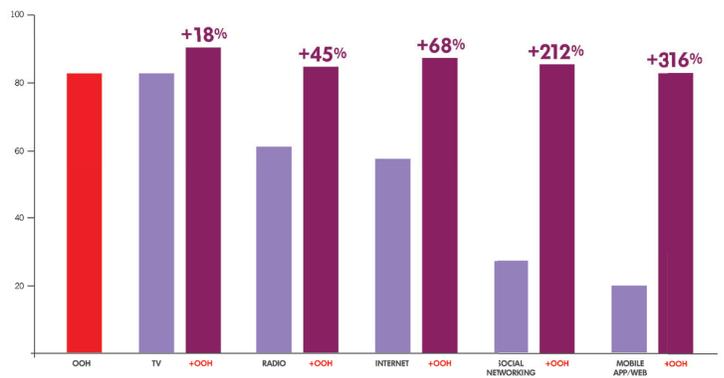


Source: BrandScience

EXTENDS REACH

While most media planners know OOH is cost efficient, many don't know that OOH can dramatically improve the reach of other media at a lower cost. When OOH is added to a media plan, it can increase reach by 18% for TV and up to 316% for mobile advertising. For social, interactive, and mobile advertising, OOH literally drives consumers 'from the big screen to the small screen' to search, interact, and transact.

ADDING OOH INCREASES REACH BY UP TO 300%



Source: USA Touchpoints Study, Media Behavior Institute, May 2012





WHY OOH WORKS

OOH works because it's the most efficient and effective way to make a big, memorable impact, wherever consumers are. And while audiences for other advertising media are fragmenting, OOH audiences are increasing.

ENGAGES CONSUMERS

People like OOH. People notice OOH. Most importantly, people respond to OOH. Seven out of ten people say they have seen an OOH ad in the past month, second only to television. And among those who have seen an OOH ad:

- 41% are more likely to learn about the brand being advertised
- 70% say OOH is very, or somewhat likely, to influence a purchase
- 58% search the web as a direct result of seeing an ad
- 55% use mobile and social media to share information while viewing an OOH ad
- 35% buy a product after seeing an ad

The more OOH frequency and scale is added, the more Internet searches and purchases result:

- 82% search the web as a direct result of seeing an OOH ad after 5 exposures
- 58% buy a product after seeing an OOH ad after 5 exposures



DELIVERS HIGH VALUE AUDIENCES

With TAB OOH Ratings, out of home advertising is now more measurable and accountable. Just like Nielsen and Arbitron, TAB OOH Ratings measure audience impressions and translate them into target demographics, reach and frequency, GRP's and TRP's.

Using geo-audited locations and demographics, circulation counts, and visibility adjustments based on format, size and position, TAB OOH Ratings measure who actually sees an ad, and delivers highly dependable and granular audience ratings that let advertisers and their agencies evaluate OOH on equal footing with TV, radio, print, and online using the same basic metrics.

In over 200 DMA's across the US, TAB OOH Ratings make OOH easier to plan, buy, and measure. And with the focus on audience instead of location, OOH delivers the highly targeted, high-value audiences that advertisers want to reach.

PUTTING INNOVATION TO WORK

When you marry operating excellence with innovation, you multiply the value of your creativity.” – Jim Collins, Great by Choice, 2011

Innovation is defined as the creation of better products, processes, technologies, and ideas.

Over the past few years, OOH has embraced innovation in all parts of its business to keep pace with where advertising and the consumer are headed. The industry is transforming the way it does business, from the inside out, to create better products, better technologies, better business practices, and better consumer experiences for advertisers.

OOH is rolling out new technologies, new formats, and new integrated mobile, social and interactive applications to help advertisers better engage with audiences.

Digital billboards and other digital displays are transforming the industry, allowing advertisers to change messages with the flip of a switch, target ads by demographic, location or day-part, and display live video, real-time Facebook messages, and Twitter feeds.

RECENT OOH INNOVATIONS INCLUDE:

- TAB OOH ratings
- Planning and buying systems integration with agencies and OOH specialists
- Eco-friendly signage materials and lighting systems
- Improved printing quality
- Compressed posting times
- Improved proof of performance
- Digital billboards, displays, and place-based screens
- Interactive kiosks and two-way consumer interactions
- Social media integration
- Mobile integration
- Quick-response codes, near-field communications, & Bluetooth® wireless applications

SOLOMO

HOW OOH DRIVES SOCIAL, LOCAL AND MOBILE MARKETING

OOH is quickly becoming a key strategy for advertisers to complement and accelerate their social media, local marketing, and mobile advertising efforts. More than ever, advertisers are using OOH to drive consumers to a web site, to interact and engage through social media, and even to transact with a smartphone.

OOH audiences are young, affluent, mobile, and connected. And, they're proven by Arbitron to be high-indexing, heavy users of the Internet, social media, and mobile devices.

- On a local level, billboards, posters, transit and street furniture can remind consumers to visit a web site or a nearby store.
- Interactive touch-screens can allow consumers to interact with brands in countless ways.
- QR codes, near-field communication and Bluetooth® wireless applications can let consumers download branded content, or even make a purchase with a tap of their smartphone.

OOH is at the center of the "SoLoMo" marketing revolution. Merging brand content, social engagement, mobility and commerce, OOH is connecting consumers with brands in highly engaging and effective new ways.



CASE STUDIES: INNOVATION ON DISPLAY

OOH's wide range of formats, sizes, locations, and technologies provide unlimited opportunities to surround and immerse consumers. These success stories illustrate the tremendous strategic and creative potential of OOH. For more case studies, please visit www.oaaa.org.

WESTIN HOTELS & RESORTS

Westin Hotels & Resorts wanted to reinforce its premium position in the hotel category by targeting upscale business travelers. Research indicated that heavy business travelers wanted a 'balanced life' – and this balance was often disrupted by the chaotic and de-humanizing travel experience. Westin developed a creative strategy to be the 'oasis of calm in a sea of chaos', and selected OOH as the main advertising media in its top 5 feeder markets of New York, Los Angeles, Chicago, San Francisco and Atlanta.

Westin ran over 270 different executions and 2,754 media placements in the country's most chaotic transportation hubs. OOH inventory included 3-D bulletins along major commuter routes, airport dominations, subway station dominations, lenticular displays, train wraps, and even a live zen garden in the center of San Francisco's business district.

Results were nothing short of spectacular. As a direct result of the campaign, Westin increased revenue per available room by 9% and achieved its highest average daily rate in brand history, up by 7%. Post-campaign research showed significant lifts in terms of campaign top-of-mind awareness (up 15%), intent to stay during next business trip (up 4%), 1st or 2nd brand preference (up 8%) and overall hotel rating (up 11%).

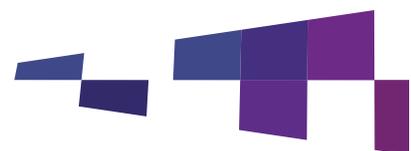


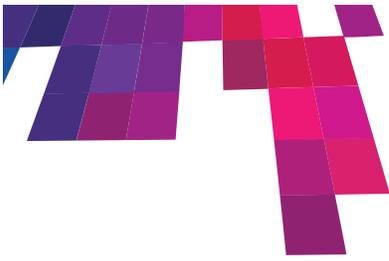


US NAVY

The U.S. Navy knew that parents, especially mothers, are often the most important influencers in the decision to enlist. They launched a new social networking site, NAVYForMoms.com, where moms and other family members could go for accurate information, to share stories, and to gain support from peers. The Navy decided to “paint the town blue” to promote the web site by using an OOH domination campaign across a wide range of diverse formats in New York City, Boston, Hartford, New Haven, Dallas, and Oklahoma City.

The results were dramatic. In addition to the substantial offline and online media buzz generated by the campaign, interest in visiting the site more than doubled from 8% to 18%, and traffic to the site increased 32%. And in a survey completed after the campaign, moms favorable to Navy enlistment increased by 25%.





CREATIVE SHOWCASE:

These OBIE Award winners illustrate the enduring power of simplicity, engaging design, and great visual storytelling. As one award-winning designer put it, "OOH is always the best test to see if your creative idea has a strong, clear strategy."



Apple



McDonald's



ESPN



Target



Coca-Cola

OBIE AWARD WINNERS



Chick-Fil-A



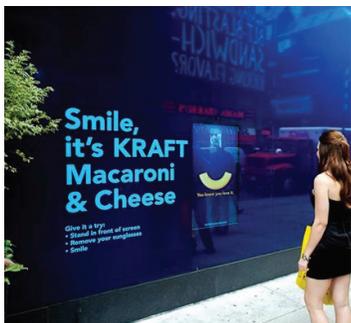
Mini



1st Bank



Cedars Sinai



Kraft



Maker's Mark

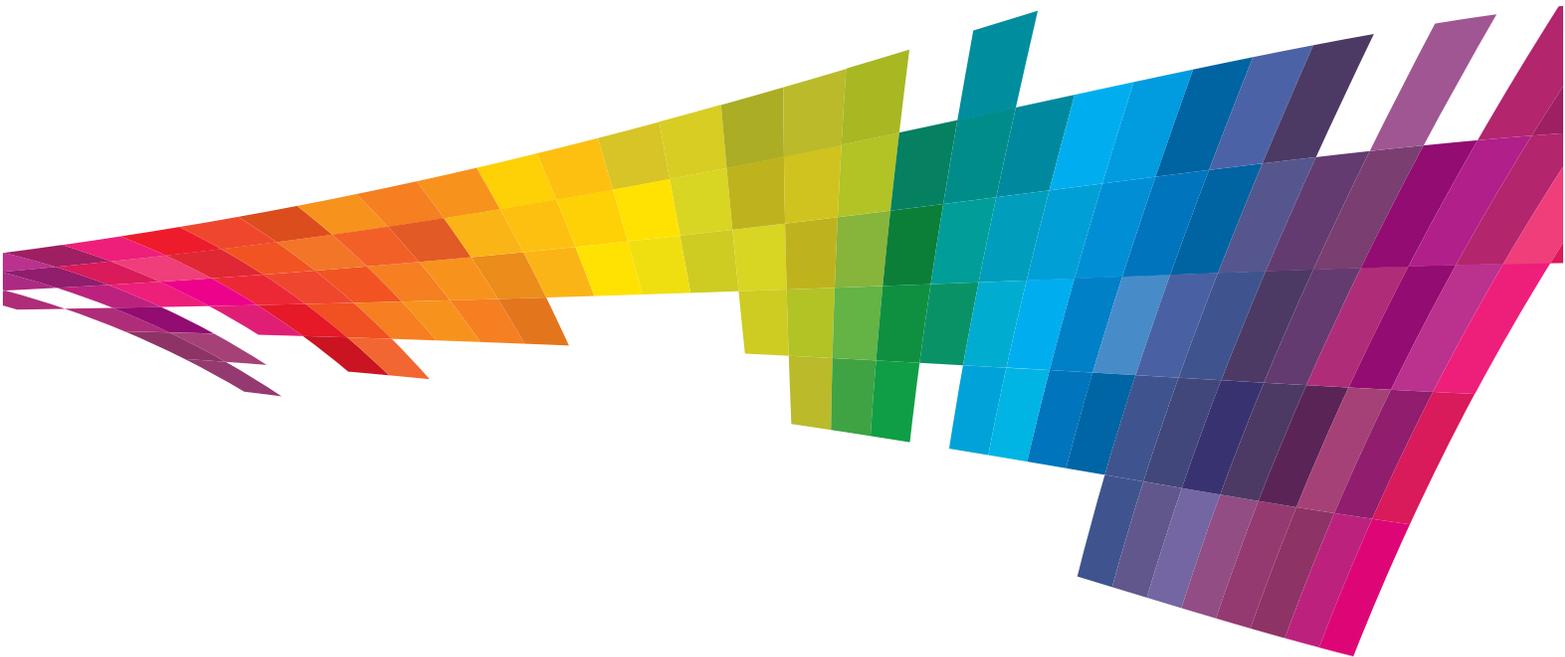


KEY FACTS

- OOH advertising revenue has grown by over 23% in the past decade to over \$6.4 billion.
- OOH is consistently one of the top three fastest growing advertising media.
- OOH reaches consumers away from home, closest to the point of sale. But even though the average consumer spends 70% of his waking hours away from home, only about 4% of all media is spent on OOH.
- OOH reaches the most attractive audiences for advertisers. Consumers most influenced by OOH are 18-49, high-earning, tech-savvy, and mobile, who spend 6-9+ hours per week commuting.
- OOH is an effective local media. About 7 out of 10 OOH ads promote local businesses.
- OOH delivers exceptional ROI. For every \$1 spent, approximately \$2.80 in sales result, compared to only \$2.41 for print and \$2.43 for TV.
- OOH provides the most cost effective reach at the lowest CPM's in advertising. At a range of \$3.38-\$8.65 per thousand impressions nationally, the only medium that comes close is radio.
- Digital billboards continue to grow in popularity. As of 2013, there are approximately 3,600 digital billboards in the United States, with hundreds more being rolled out each year.
- 58% of all consumers have gone online as a direct result of seeing an OOH ad. OOH is quickly becoming the most 'converged' advertising media, working seamlessly with social media, mobile and online campaigns to drive consumers 'from the big screen to the small screen.'
- The advent of near-field communication ("NFC") and quick-response codes ("QR") has created exciting opportunities to make OOH even more engaging, interactive, and transactional.
- People like OOH advertising. 85% believe OOH advertising is useful, 83% think OOH is informative, and 82% say OOH helps create jobs and stimulate the economy.
- Many of the largest brands in the country use OOH in their integrated media strategies, including: McDonald's, Verizon, Warner Brothers Pictures, JPMorganChase, Apple, AT&T, Coca-Cola, and Geico.

TAKE ANOTHER LOOK.







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