Connecting Brands with People Technology and Outdoor

William Eccleshare
CEO, Clear Channel Outdoor
Why outdoor is back in.
Mass-media fragmentation

Increasing time out-of-home

Time on public transport

Faster communications 3G, 4G, City-wide wi-fi

Urbanisation

Changes how, when, where we consume media

Ad avoidance

Mobile device capabilities
Changes how, when, where we consume media
We have become skilful ad avoiders
% adults using mobile for purchases: 30% US 60% China

Power of consumer technology
Placing our bet for future growth
% of Time Spent vs. % of Advertising Spending, USA 2012

KPCB

Note: Internet advertising reached $37B in USA in 2012 per IAB, Mobile advertising reached $4B per eMarketer. Print includes newspaper and magazine. $20B opportunity calculated assuming Internet and Mobile ad spend share equal their respective time spent share. Source: Time spent and ad spend share data based on eMarketer (adjusted to exclude outdoors / classified media spend), 12/12.
• Nielsen found that ads shown on mobile ranked lowest among any kind of media when judged by consumers’ trust

• YouGov found that two-thirds would find it unacceptable to receive “unwanted advertising” on their mobiles

• “The main problem is that ads on such an intimate device are perceived differently from when seen on a TV screen or outdoor advertising screen,” says Christophe Cauvy, European head of digital and innovation at JWT. “The screen size does not allow much nice, non-intrusive advertising.”

Source: Financial Times, FT.com “Mobile: Nirvana is tantalisingly close”
Are Chief Marketing Officers happy with their mobile efforts to date?

14% Happy

47% Dissatisfied

Source: Chief Marketing Officers Council, 2012
Meet Google.
They mean business in the outdoor space: Investing heavily to understand people’s behaviours in the outdoor space.
Outdoor is well placed to be a more relevant and **integral part** of the conversation that advertisers will increasingly seek to have with potential customers

JCDecaux, Reference Report 2012
Cross Media Exposure Influences Mobile Search

Motivations for Mobile Search As a Result Of

- **61%** Word of Mouth
- **44%** Saw something in Store
- **18%** Saw Online Ad
- **68%** Traditional Media
- **27%** Mobile Ad

**Source:** The Mobile Movement Study, Google/Ipsos OTX MediaCT, Apr 2011

Base: Smartphone Users Who Use Search (4902)

Q. Have you ever used a search engine on your smartphone to find more information on something that you ...
### Cross Media Exposure Influences Mobile Search

Motivations for Mobile Search As a Result Of

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#### Traditional Media

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<th>Source</th>
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<tbody>
<tr>
<td>TV commercial / program</td>
<td>43%</td>
</tr>
<tr>
<td>Radio</td>
<td>40%</td>
</tr>
<tr>
<td>Billboard</td>
<td>36%</td>
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<tr>
<td>Mail</td>
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#### Mobile

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<td>Mobile search ad</td>
<td>21%</td>
</tr>
<tr>
<td>Display ad on website or app</td>
<td>17%</td>
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DELIVERING THE UNEXPECTED
Day 4 Twitter debate: Has globalisation diluted creativity?

Has going global been at the expense of local relevance? And has globalisation therefore presented us with incredible challenges or opportunities, in the pursuit of extraordinary and effective creativity? Read more

Day 3 - #canvas for creativity Twitter mural

TAGS
CANNES LIONS, CANVAS, LIVING CANVAS

Meet the artists: Patrick McGregor and Tait Roelofs.

Meet the two men who have the painstaking task of hand painting hundreds of your tweets on to our billboard - Patrick McGregor and Tait Roelofs. Read more

TAGS
So what do we do now?
Thank you