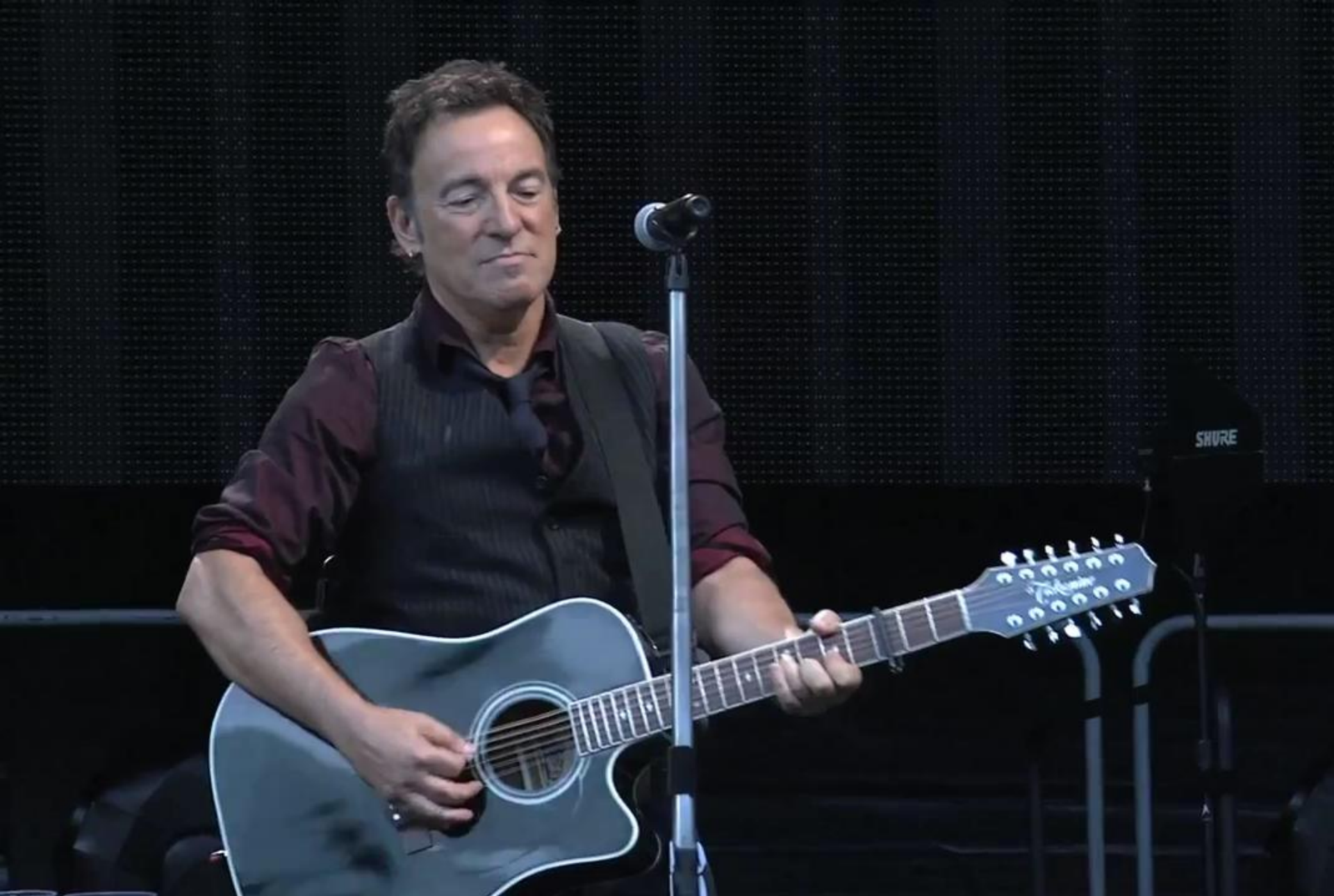




Connecting Brands with People Technology and Outdoor

William Eccleshare
CEO, Clear Channel Outdoor



Why outdoor is back in.

Mass-media fragmentation

Increasing time out-of-home

Time on public transport

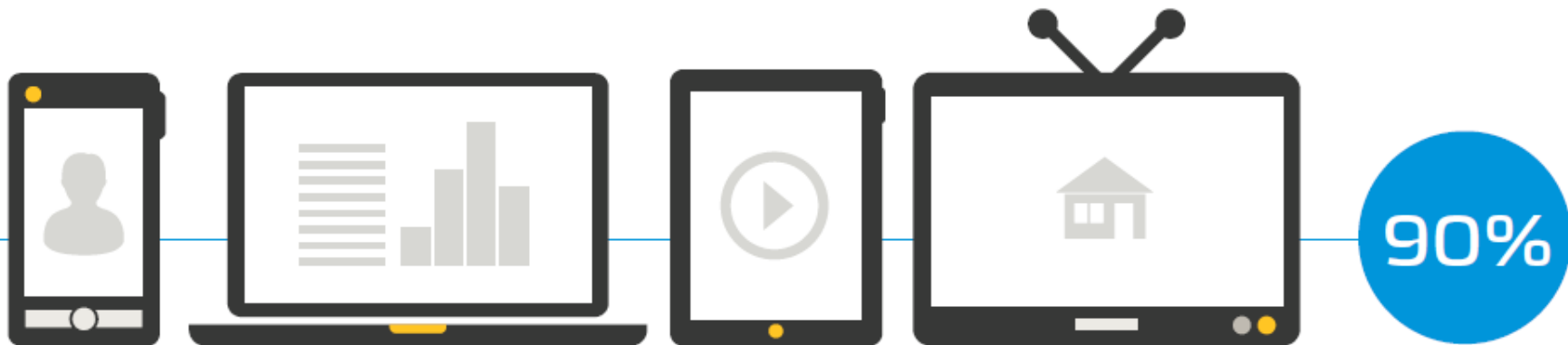
Faster communications 3G, 4G, City-wide wi-fi

Urbanisation

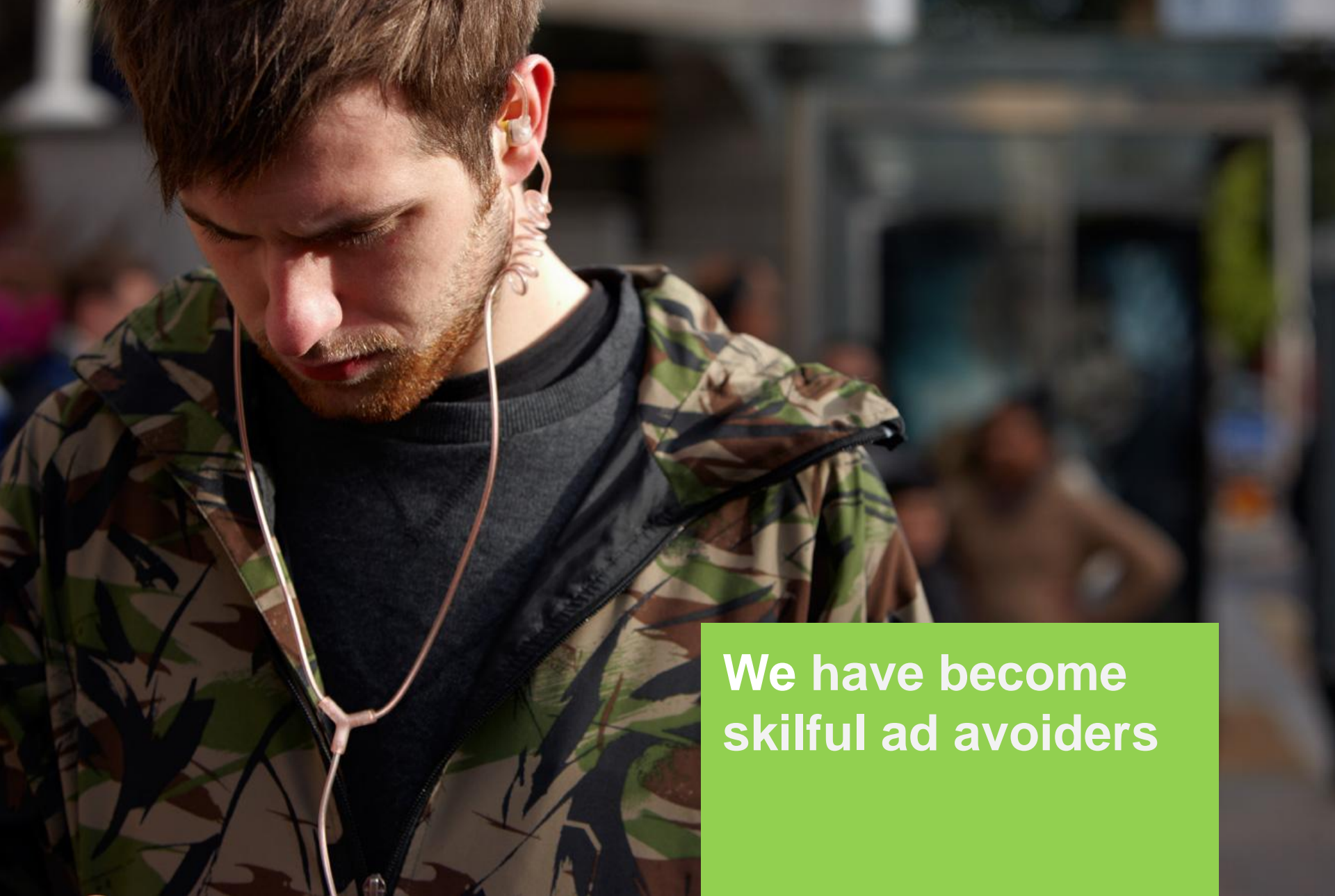
Changes how, when, where we consume media

Ad avoidance

Mobile device capabilities



Changes how,
when, where we
consume media



**We have become
skilful ad avoiders**

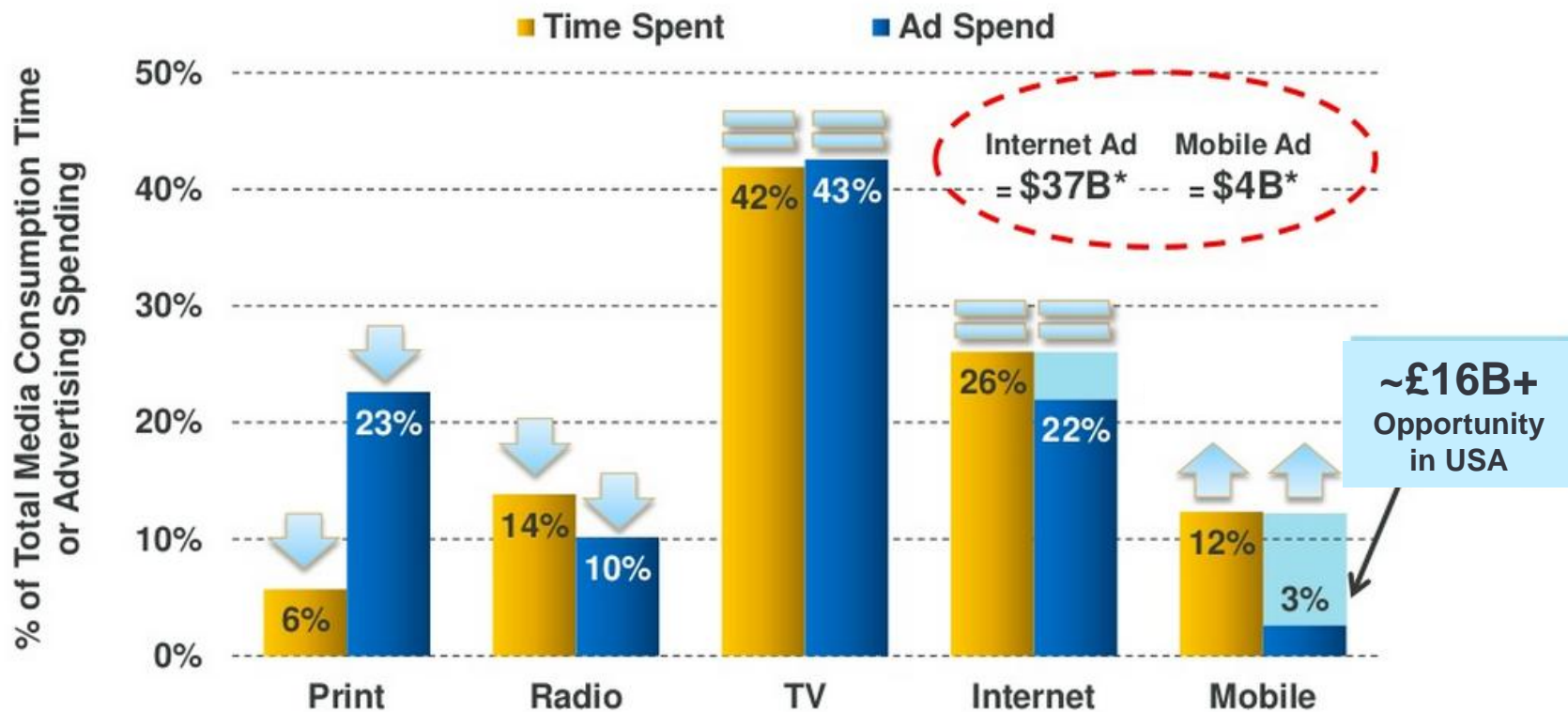


% adults using
mobile for
purchases:
30% US
60% China

**Power of
consumer
technology**

Placing our bet for future growth

% of Time Spent in Media vs. % of Advertising Spending, USA 2012



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.

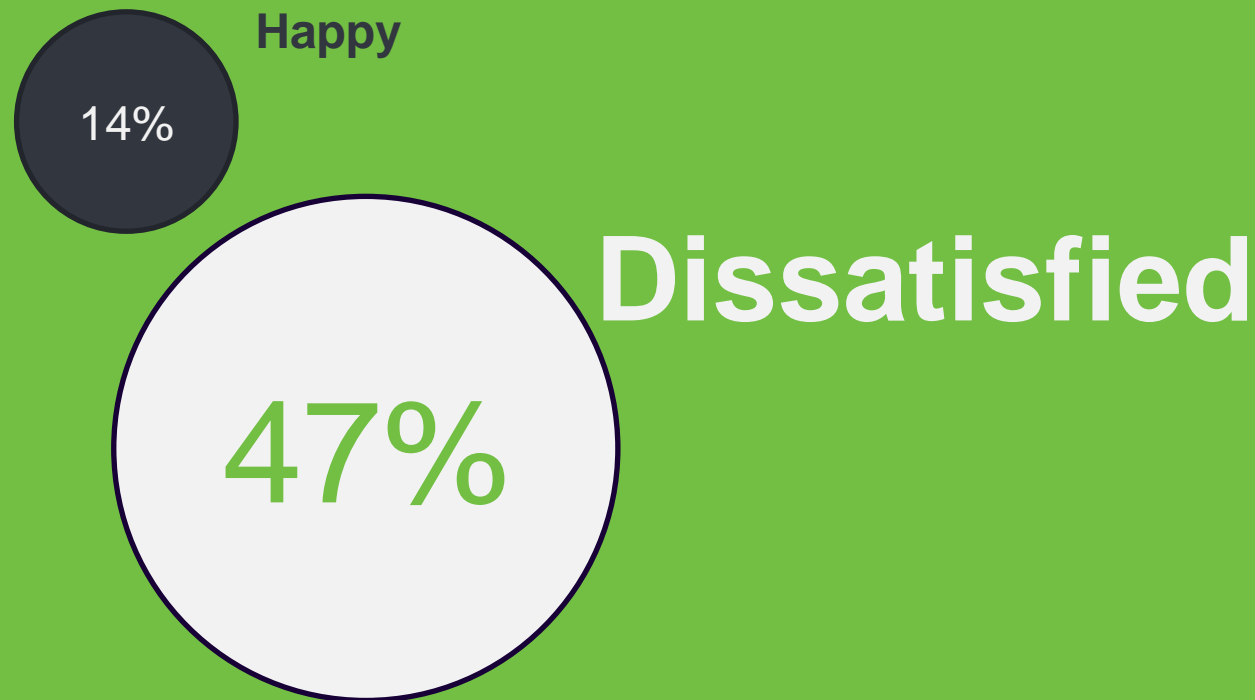
KPCB

5

- 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”

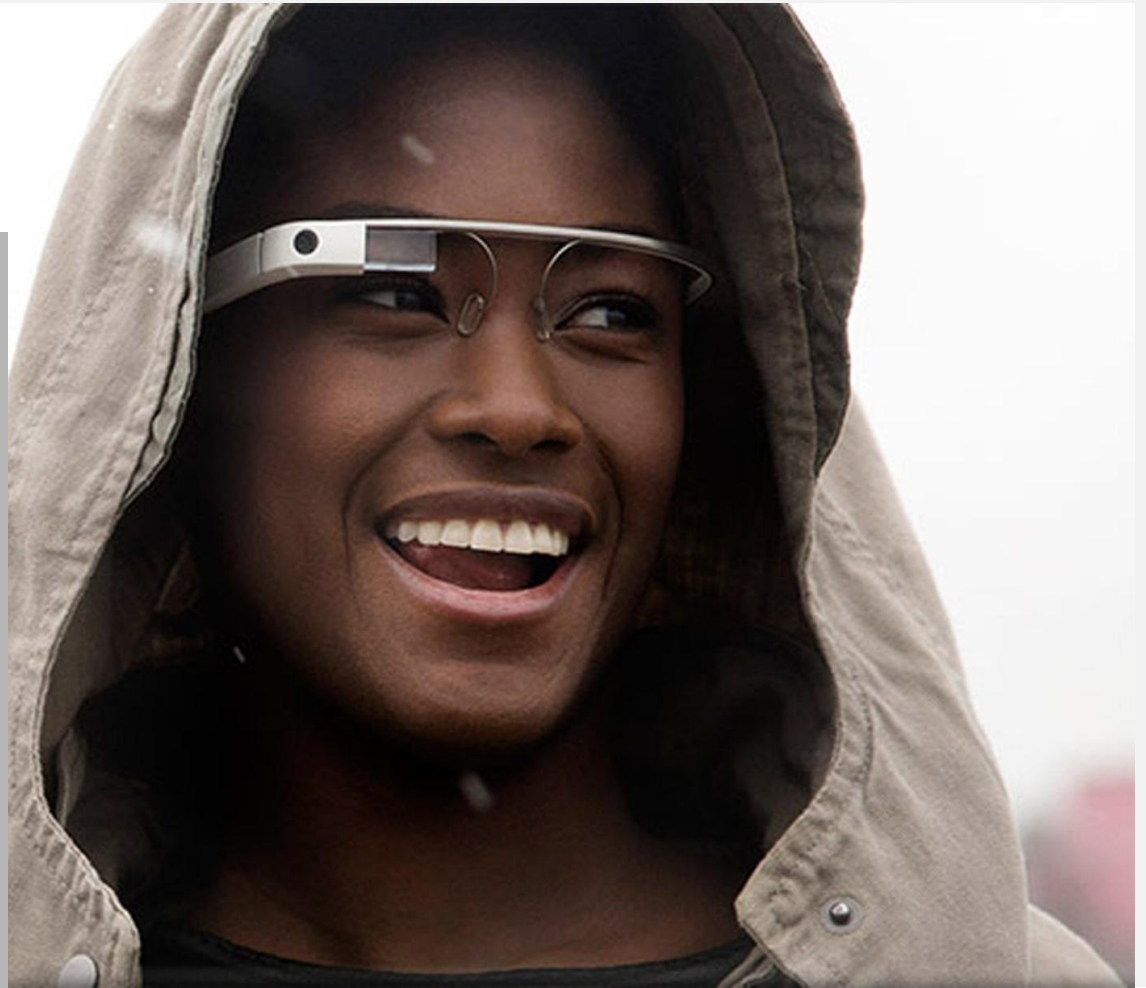
Are Chief Marketing Officers happy with their mobile efforts to date?



Source: Chief Marketing Officers Council, 2012

Meet Google

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

Friends/family 51%

Social networking 38%



44% Saw something in Store

Saw in Store 44%



18% Saw Online Ad

Banner or search ads 18%



68% Traditional Media

TV commercial / program 43%
Radio 40%
Read magazine/newspaper 35%
Billboard 36%
Mail 22%



27% Mobile Ad

Mobile search ad 21%
Display ad on website or app 17%

thinkmobile
with Google

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 ...

Google Confidential and Proprietary 34

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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

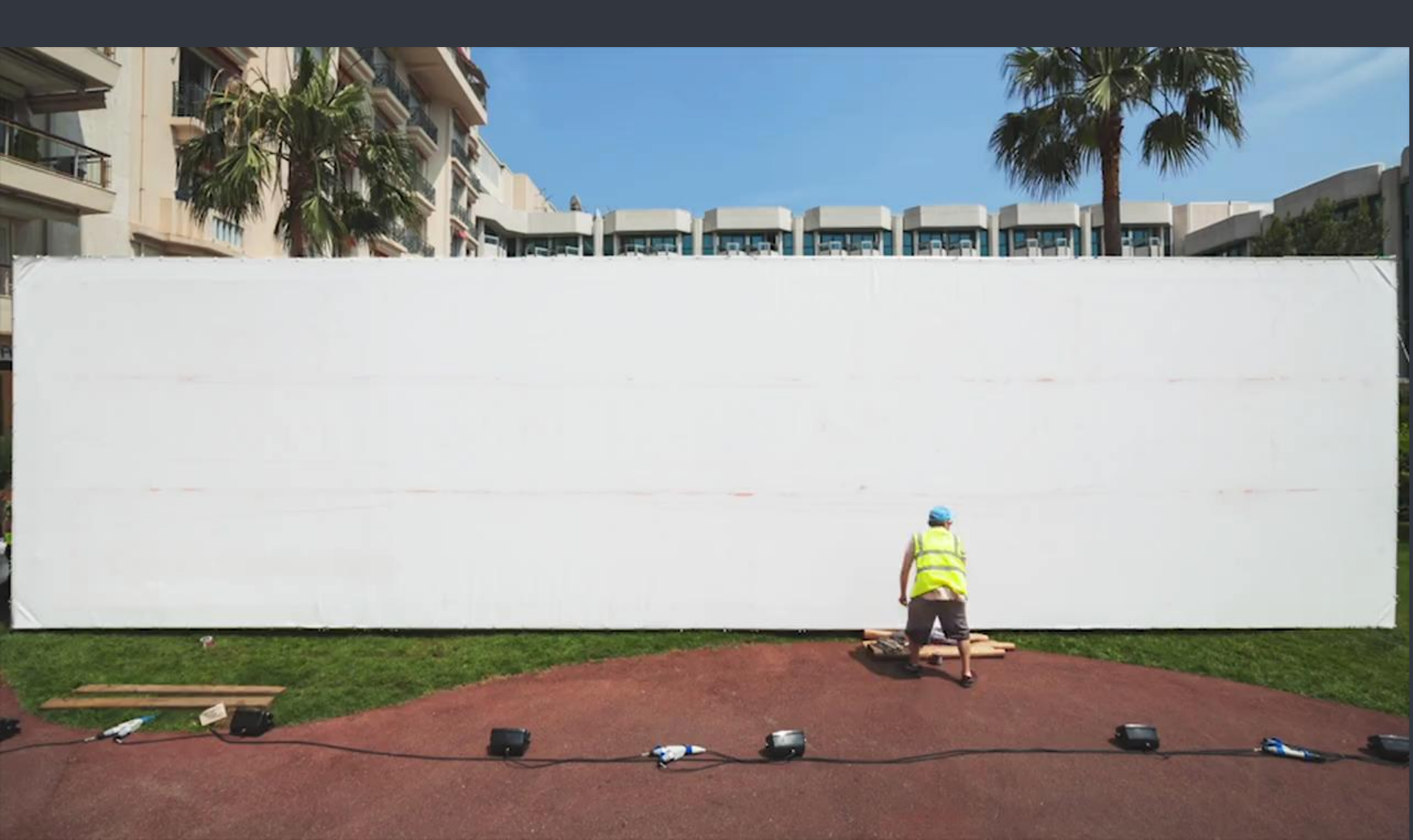
TAGS
CANNES LIONS, CANVAS, LIVING CANVAS



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