



INDIAN
OUTDOOR
ADVERTISING
ASSOCIATION



FROM THE CHAIRMAN'S DESK

Noomi Mehta, Chairman, IOAA



It is a matter of pride that OOH has been embracing technology in delivering its message. LED and LCD digital screens are now commonplace in all developed and developing countries. India too has started embracing the latest technology. Given this background, it is only fitting that IOAA launches its Newsletter only in digital format.

Delivery of news today must be flexible, instant and immediately accessible. Ours is a pan India business but many of the problems we face locally have already been faced before and in many cases solutions have been found. We need to be able to share this information and nip problems in the bud before they attain momentum. It can also help to get us closer to each other and share the opportunities that exist for mutual benefit. Technology provides us the ideal platform for doing this.

I look forward to hearing from all of you via our Newsletter.

OOH WILL ALWAYS OUTDO OTHER FORMS OF MEDIA ADVERTISEMENTS

What was the size of the industry when you started your career in the outdoor industry?

The size of the Indian Outdoor Advertising Industry was approx. 250 Cr out of which Pioneer's share of contribution was Rs.12 Cr.

Which year & what were the outdoor formats prevalent at that time?

I joined this industry in 1975 when outdoor advertisements were mainly done in the form of wall paintings, electric pole ki-



Sunil Vasudev,
Director,
Pioneer Publicity

ed. Advertisements were designed mainly in two sizes i.e. 20'x10' & 12'x8'.

What were the successful measures implemented?

Introduction of large size permanent hoarding structures on ground level as well as on roof tops of buildings contributed to the initial growth of the industry. When large size hoardings on ground level and rooftops were banned in Delhi by the Hon'ble Supreme Court of India in 1997, Pioneer introduced the

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osks, cloth banners and temporary structures made of Girders/ MS Angles and Tin Plates. All the advertisement material was hand-paint-

concept of Unipoles which was later adopted by other companies and authorities PAN India.

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IOAA HAS BEEN ON THE FOREFRONT IN CAMPAIGNING AGAINST ILLEGAL MEDIA BUT WE ALL NEED TO BE ON SAME PAGE FOR DEFINING “ILLEGAL MEDIA”

Over the last few months, the IOAA Secretariat has launched a serious effort to inform Brands when their sites are observed on sites that are known to be “illegal”. When IOAA does this, how does it establish that site in question is “illegal”?

The basic definition of “illegal” site is one that does not have any current, valid permission, approval or any license based on fee paid during current financial year or does not have any legal injunction or order that supports its continuation at that location. This includes sites that were part of a known “Tender” which has expired and has not been renewed.

The issue becomes murkier when it comes to areas outside municipal limits. Typically, all our cities have these days expanded beyond municipal limits. This is particularly so along the new highways and expressways which has also created a large new audience of inter-city travelers who use buses, four and two-wheelers to commute. Therefore, one observes really lengthy entry/exit areas outside

nearly every city which has warehouses, commercial establishments, diners and eateries, wholesale outlets and also housing. This easily provides the ground for erecting OOH Displays in these areas, especially when there is no license or permits to be obtained from any government or municipal authority and questions – if any – raised by any local authority is easily managed. So one has a ready inventory of sites at city entry/exit areas, of equal quality to those found inside the city and often better with less clutter, which become up for the grabs for campaigns targeting the city. The attraction for these sites increases even more when one considers that sites in typical municipal areas these days come at a cost dictated by the high tender rates being charged by civic bodies. One has to see the current practices in Punjab, Jammu, TN, etc. to realize the impact of these sites and the extent to which these affect the legal sites inside the city – where the primary audience for the brands is actually present.

So are these sites -- located just

outside city municipal limits -- legal? Strictly speaking, all these areas fall under the jurisdiction of at least a local Panchayat. And in any case, sites are not permitted on the Highways or Expressways. Therefore, if any site does not even have a Panchayat license or permit, then it certainly has to be illegal.

As such, IOAA has been following policy of treating sites outside the city municipal limits as illegal unless the concerned media owner can provide copy of some documentation supporting presence at that location. IOAA has also been informing specialist agencies of these issues to prevent disputes. However, all members as well as those with sites just outside municipal areas must also be aware of this position. But, most importantly, clients and their agencies must realize that though they may consider presence on entry–exit areas as being present in that city, they are definitely missing bulk of the targeted audience who are available only inside the city – which they are avoiding because of cost issues.

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Introduction of printed Flex for advertisements on Unipole, Billboards, and Wall wraps Kiosks and other outdoor media gave the much needed impetus and thrust to the OOH industry as the impact of printed Flex vis-à-vis hand painted advertisement was considerably better with a reduced installation time. Innovations in the form of cut-outs, Neons etc. has further contributed to the growth of Industry and innovations were done on Unipoles, Billboards, Bus Shelters, Mall media etc.

Describe the journey you envisage for the Outdoor industry and yourselves?

I started my journey with Pioneer when the turnover was a meagre Rs.12 Cr. It has since climbed to around Rs.280 Cr. Today the OOH advertising market size is Rs.3400 Cr in India in which Pioneer has a share of 8.25%. Pioneer has introduced the concept

OOH WILL ALWAYS OUTDO OTHER FORMS OF MEDIA ADVERTISEMENTS

of Semi-naming/Co-branding of DMRC Stations and we have contract for 29 Metro Stations of DMRC. This new concept promises to go a very long way in branding of clients as these projects have a 10 or more years duration. Thus the brands can remain associated with a particular metro station for a long time.

What do you think are the major challenges confronted by the outdoor industry?

The OOH is majorly hamstrung by the basic drawback that policies of different State/Municipal authorities are anti-OOH. Hoardings on rooftops, large sized billboards and digital advertisement on roadside are not

permitted in Delhi but the same are permitted in many other metros. Moreover, the NHAI does not permit any kind of legal OOH advertisements along NHAI roads. However, what is actually observed is unauthorized OOH advertisements are rampant alongside NHAI roads all over India.

Why do you think outdoor will outdo other medias?

OOH advertising shall always outdo other advertisement media because of the following reasons:

COST EFFECTIVE: OOH advertising is most cost-effective than any other form of advertisements be it newspaper advertisements or TV Commercials.

RECALL VALUE: OOH advertisements carry the best recall value compared to any other form of advertisements because of long viewing time, large format and repeat viewing.

NATIONAL NEWS

INDIA'S OOH SECTOR TACKLES LACK OF METRICS

India's OOH industry is expected to benefit this year from infrastructure spending and government initiatives – as also from elections and sporting events – but it urgently needs to address the lack of standard metrics for this sector, according to observers.

While the ‘smart cities’ campaign and the expansion of the airport network, for example, are opening up new opportunities, OOH lags other media in reporting impact – and that may affect how advertisers choose to use it.

Recently, there was positive movement on this issue as the Indian Outdoor Advertising Association unveiled a new initiative that will see local start-up Display Metrics India working with Ipsos India and MGE Data of the Czech Republic to develop Metrics for Out-of-Home Displays (MOD).

This is a major project that will involve mapping inventory and monitoring site displays and then combining that with traffic intensity data travel survey data.

The first phase will cover Delhi NCR followed by the Mumbai-Thane-Navi Mumbai cluster, Media4Growth reported, before expanding to another top eight markets.

NO RESPITE FOR BENGALURU OOH YET THE BBMP HAS OBTAINED A STAY ON HC ORDER TO BRING BACK ADVERTISING ON AUTHORISED OUTDOOR MEDIA IN THE CITY



No sooner did the High Court of Karnataka issued an order to permit display of advertising on authorised media in the city of Bengaluru -- by which the one-year ban imposed by BBMP on roadside media was to

be reversed – than the urban local body (ULB) knocked the court doors to get a stay on the said order citing technical reasons. When approached by Media4Growth to know more about this development, Manmohan Singh Mann of Popular Advertisers said it was not clear that on what grounds the court had issued the stay order.

The industry will initiate the next steps to bring back business upon obtaining the details cited by BBMP, and if required, will approach the higher court for a favourable decision.

As per reports, BBMP informed the High Court that its new bylaws and advertisement policy will be submitted by today. The High

PIONEER PUBLICITY SETS UP STATE-OF-THE-ART DOOH FORMATS INSIDE CHANDIGARH'S ELANTE MALL

10 HD free standing units and 6 HD digital pillar wraps have been installed inside the mall

Pioneer Publicity in partnership with Elante Mall, has installed a variety of digital media formats inside Chandigarh's biggest shopping destination Elante Mall. The digital formats include 10 free standing HD units of 4'x8' and 6 pillar digital wraps of size 7.5"x11.2" each. Both formats will play 15 seconds ad slots, every 3 minutes. The entire media installation has been done according to visibility norms and visitor movement patterns to attract maximum eyeballs to the screens. The Pioneer has inked a pact with the mall for a period of 5+2+2 years.

SRISHTI COMMUNICATIONS WINS SOLE RIGHTS ON BENGALURU-CHENNAI SHATABDI TRAIN

The advertising rights for train exterior and interior branding have been acquired for a period of 5 years and the win expands the company's transit media portfolio

Srishti Communications has won the sole advertising rights on the daily Shatabdi Express train plying between Bengaluru and Chennai. The contract -- for both train exterior and in-train displays -- has been acquired for a period of 5 years. S Kumar, Chairman of Srishti Group of Companies told Media4Growth that the media on this premium train will be attractive to many top corporate brands that seek to connect with large audiences in the OOH space.

As such, the Shatabdi Express train passenger profile is very diverse, ranging from top professionals and decision-makers to home-makers. As this train connects the two big cities in a matter of 5 hours, many people are seen to opt for this train journey instead of air travel. That makes the advertising medium on this train all the more attractive.

By securing the entire advertisement space on the interiors as well as exterior of the coaches of this train, Srishti Communications contemplates offering the entire space in one lot to their clients so that the product/ service advertised get deeply

IOAA CONDUCTS THE FIRST EVER BUYERS'/SELLERS' MEET AT MUMBAI



The Association confirms a good round of participation by its Members for Tier 2 & 3 cities

- CHAMS of Kochi bagged the sole rights for inter-state as well as intra-state tourist Bus advertisement rights which allows them to go for full body wraps of buses like Scania & Volvo.
- Kanhaiya Advertisers of Chandigarh bags the exclusive media rights for display at Bhatinda Railway station.
- Brite Neons of Delhi bags the exclusive media rights for display at Amritsar Railway station.
- Prakash Arts for display at Vizag and Vijayawada Airports

The event had active participation by 3 of the most reputed agencies and they were represented by their Head of Buying/Marketing. IOAA plans to hold many more such events in the future.



DISPLAY METRICS INDIA UNVEILS OOH METRICS DEVELOPMENT ROADMAP

Display Metrics India Pvt Ltd, a start-up in the business of data analytics and metrics for OOH advertising, unveiled its project roadmap to the Indian OOH leaders at a launch event held in Mumbai on January 17. Display Metrics has teamed up with Czech Republic-based MGE Data and the Indian arm of IPSOS to develop Metrics for Out-of-Home Displays (MOD) and other service offerings for the Indian OOH industry in a pact with the Indian Outdoor Advertising Association (IOAA). Display Metrics has had deep discussions with global industry councils and leading players like JCDecaux, Kinetic Worldwide, Posterscope, and UK's Route Research for key takeaways from their own respective experiences with developing or using OOH audience metrics.

At the launch event, Noomi Mehta, Chairman, IOAA said in his opening remarks that "for any medium to realise its true value, it is important to speak the same language as our customers". The joint industry audience measurement would have a significant positive cascading impact on multi media planning, media auditing & procurement, cost (CPT), economic modelling in relation to ROI, and aspects like media

viewability and viewed impressions.

Providing an overview of the project roadmap, Indrajit Sen, who is helming the start-up business, explained during the course of his presentation that Display Metrics will be focused on:

- Mapping entire inventory data of target markets – through street by street survey, recording of the same on an app, and using GPS coordinates.
- Validation of the data.
- Weekly monitoring of displays on each site.
- Identification of brand displays on the sites, and classification of the brand displays as per categories.
- Publishing standard adex reports (through its ONSITE service offering) – the reports will be available in standard formats, while the clients may be also have customised reports. In addition they will data access.
- Establishing site monitoring (through its ASSURE service offering), with the back-end teams analysing every monitored visual real-time; in doing so they will be able to bring to the attention of site owners any issues related to the displays.

GLOBAL NEWS: EUROPE NEWS

UK: Exciting times for Out of Home as transformation mixes with uncertain times in 2019

Political uncertainty mixes with a real excitement for change as Out of Home undergoes genuine transformation: new players, new data platforms and new opportunities.

Out of Home is an industry unquestionably in the spotlight. The arrival of media group Global, genuine advances in the use of technology, wider access and use of location data, and the potential for integration of digital and motion content are stimulating antidotes to political intrigue and social media woes as brands seek ongoing reassurance from their ad activity in changing times.

FEPE INTERNATIONAL 60TH ANNIVERSARY CONGRESS IN DUBAI - EARLY BIRD BOOKINGS OPEN UNTIL JAN 31ST

International Out of Home association FEPE International's 60th anniversary Congress is now open for registrations. Congress, with the theme The Fame Game, will be held at the Intercontinental Hotel in Dubai from May 1 to 3 2019.

The Keynote Speaker is Jean-Charles Decaux. Jean-Charles alternates with his brother Jean-Francois Decaux as Chairman of the Executive Board of the world's largest Out of Home media company, JCDecaux. Jean-Charles Decaux will deliver his Keynote Address on the morning of May 2 woe as brands seek ongoing reassurance from their ad activity in changing times.

USA: NANCY FLETCHER'S 5 PREDICTIONS FOR OOH IN 2019

1. Advertisers will get out of home in unprecedented numbers
2. OOH fortunes will continue to rise.
3. More national brands will recognize the power, performance, and prestige that OOH provides.
4. The Las Vegas OOH Media Conference will be transformative.
5. Tech companies will double down on a commitment to OOH.



FROM IMMERSIVE EXPERIENCES TO DATA-DRIVEN CAMPAIGNS, HERE ARE TOP OOH TRENDS TO KEEP AN EYE ON FOR 2019

Thanks to the rise of video consumption, acquisitions, and entry into the industry from some of the world's largest players like Amazon, digital out-of-home advertising is poised for a game-changing year. Here's a look at my predictions and trends over the next year that advertisers and OOH media owners should be aware of to succeed, writes, Matthew Schuster, Chief Revenue Officer at Vistar Media.

Out-of-home (OOH) advertising has grown tremendously in the past year, and a Magna Intelligence study predicts OOH spends will reach \$33 billion by 2021. While rather large, this figure isn't shocking to players in the industry who spend millions every year looking to connect with consumers through physical and digital signage.

The size of the industry and potential for where it can go is being proven every day with new players entering the space and large tech companies doubling down on their efforts - consider the investments we've seen from tech behemoths like Apple and Amazon, which are now in the top 10 spenders in the category.

