



# Out-of-Home advertising

The giving back story






Stephen Woodford  
**CEO**

Advertising Association

**Out-of-Home is a brilliant example of how advertising stimulates economic growth while also giving back to society through the investment it funds in our towns and cities. Reaching thousands of people with just one ad, OOH advertising is on a mission to reduce its carbon impact. As this report by the Outdoor industry shows, the power of OOH advertising is reflected in its ability to empower small local brands, transform opinions as well as pave the way for a more circular economy.**



# London in the limelight

London has survived fires, wars, plagues and pandemics.

And now it's back: bigger, brighter and bolder than ever before.

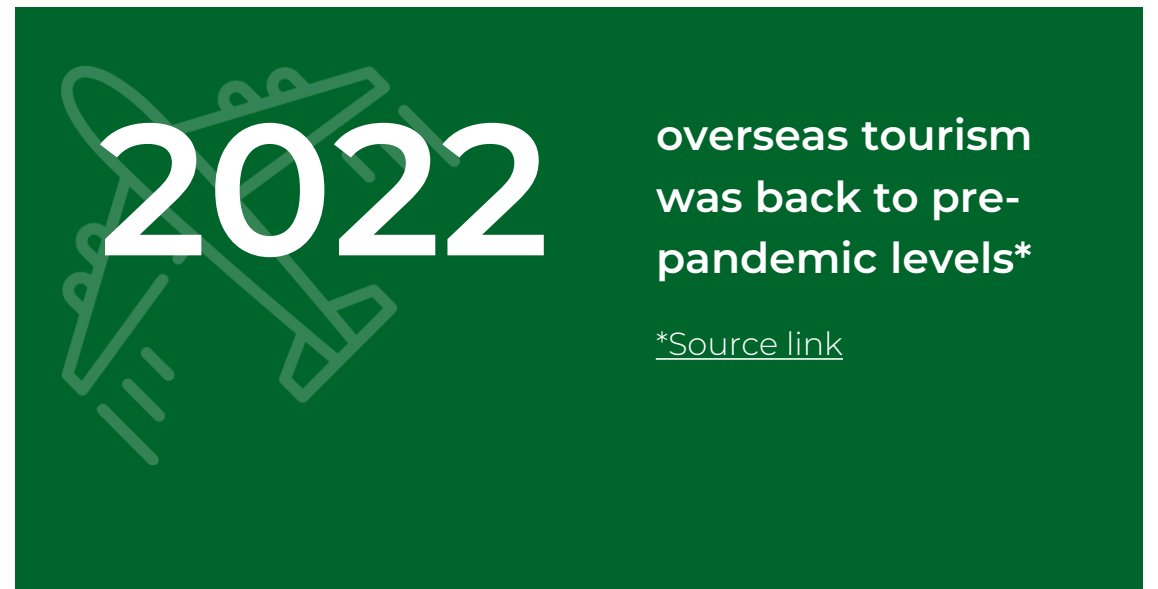
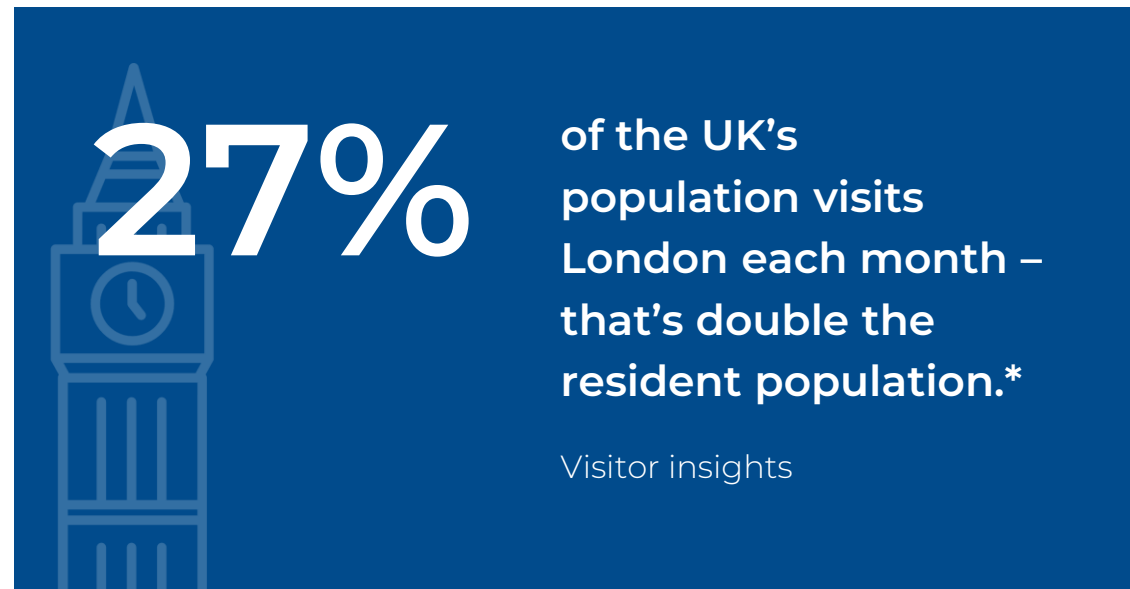
There's nowhere quite like London. Its eclectic mix offers up everything from education to entertainment to entrepreneurship. It's an economic powerhouse and a creative bolt hole.

There's a tapestry of cultures and communities here, interwoven and interconnected. It's a place of momentum; a city that knows

where it's been and what direction it's headed.

Transport keeps London moving. With **55 million** weekly journeys, Transport for London is the strong, green heartbeat for a city that's always on the go.

**So, let's think about our part in London's story.**





Travelling around London is a visceral experience. It's the riot of colour, the sights and the sounds that make it what it is.

Just imagine for a moment Piccadilly Circus without the Piccadilly lights. Or long, poster-less tube corridors. Or buses without the latest London theatre showcased on their sides. London without Out-of-Home (OOH) advertising wouldn't be London at all. It's an intrinsic part of our collective identity. It's our point of difference. It's a public medium that mirrors the economic and cultural depth of this global city.

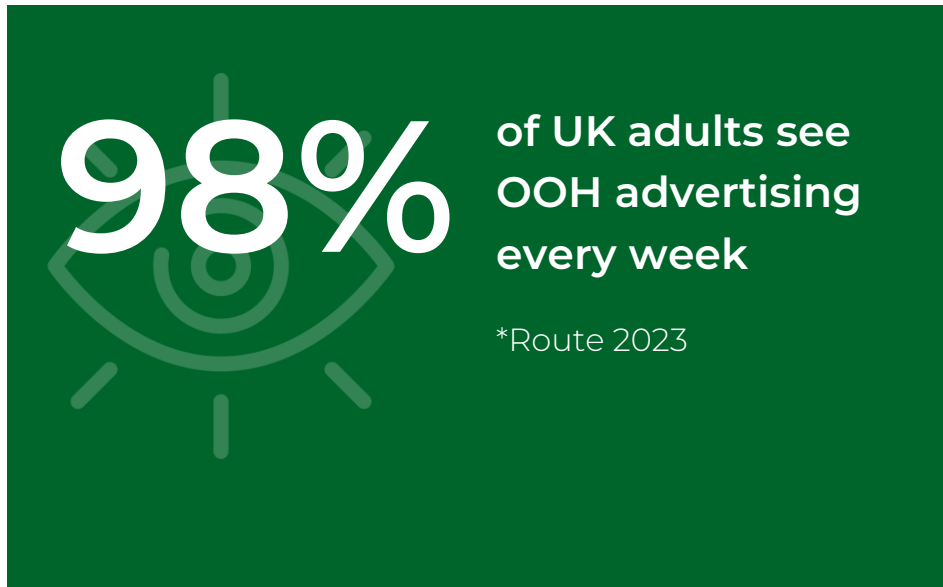
Yet it goes even deeper than that. Because it is a media channel like no other. A channel which gives back to the communities it serves. A channel that provides substantial funding to local authorities and transport companies to invest in improved public services. And a channel that understands its role in society and the positive change it can make.

And that's the story we want to tell. One that's been untold for far too long.

**This back story.**

**This giving back story.**

**This giving back to London story.**







# A channel like no other

It pays back

It gives back

It's trustworthy

It's reducing its environmental impact





It pays  
back

Out-of-Home advertising plays a central role in helping London thrive. Every pound TfL raises is reinvested straight back into the network to keep London moving.

That's the thing about OOH – it paves the way for a more circular economy. It doesn't just benefit the brands taking up the advertising space, it works for the good of entire communities.

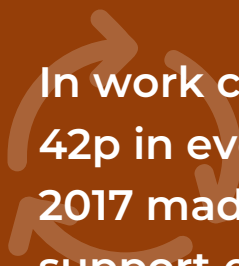
It's an investment that goes straight back into the public purse via rates, rent and revenue share.

\* Disclaimer:

PricewaterhouseCoopers LLP's ("PwC") estimates for Out of Home advertising's contribution to the UK economy are based on work commissioned by Outsmart, the trade association representing the UK's out of home advertising industry. PwC's work was based on a survey of Outsmart members with respondents to PwC's survey representing 92% of Out of Home advertising industry revenue.

PwC did not verify the information which it received from respondents, and gives no opinion or other form of assurance with respect to such information. PwC's work was prepared only for Outsmart and solely for the purpose and on the terms agreed with Outsmart. PwC accepts no liability (including for negligence) to anyone else in connection with that work. PwC has agreed to include reference to its work in this publication provided any reader understands that this publication was prepared for general guidance on matters of interest only, and does not constitute professional advice.

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**In work commissioned by Outsmart, PwC estimates that 42p in every pound spent on Out of Home advertising in 2017 made its way back into the UK economy helping to support employees, communities, transport, infrastructure and local authorities.**

\*Disclaimer

**£97m**

**In 2021/22, £97m of revenue was generated from commercial activity including TfL's world-class advertising estate.**

**That's equivalent to 38.8m Zone 1 Tube journeys!**





# £1.2bn

In 2022, approximately £1.2bn of UK advertising spend was Out of Home, and a third of that was in London.

\* Nielsen Ad-Intel.



# £148bn

Did you know £1 of advertising spend generates £6 for the UK economy and that advertising contributes £148bn to the UK economy?\*

\*Advertising Pays 8, 2019 AA/WARC Expenditure Data, Advertising Association.

IT PAYS BACK

# Funds public services for good

## Street furniture that saves lives

An innovative range of street furniture meets the latest digital advertising tech. Specially designed automated external defibrillators can be freely used by the public to save lives.

So far, the defibrillators have been deployed 343 times across London and beyond.





IT PAYS BACK

# Funds public services for good

## Bringing us closer

OOH industry introduced 4G connected bus shelters to the London Borough of Tower Hamlets.

That means enhanced 4G mobile signal thanks to built-in small cell connectivity.





IT PAYS BACK

# Funds public services for good

## Keeping communities connected

Street Hubs are cutting edge payphone upgrades that offer free Wi-Fi and calls, rapid device charging and touch screen tablets to find local information and a dedicated 999 service button.





IT PAYS BACK

# Champions health and well-being

## Tackling pollution

Airlabs and Chiltern Railways are championing green advertising tech. They adapted traditional OOH ad space to create four 'Clean Air Zones' in Marylebone station.

In a twelve-month period, the air filters produced 41.4 million cubic metres of clean air, enough to fill Wembley Stadium 36 times.

\*Source: Airlabs



IT PAYS BACK

# Champions health and well-being

## Improving air quality on our streets

Integrated sensors in digital advertising displays are monitoring air quality, as part of a scheme aimed at improving the health and safety of Barking and Dagenham residents.





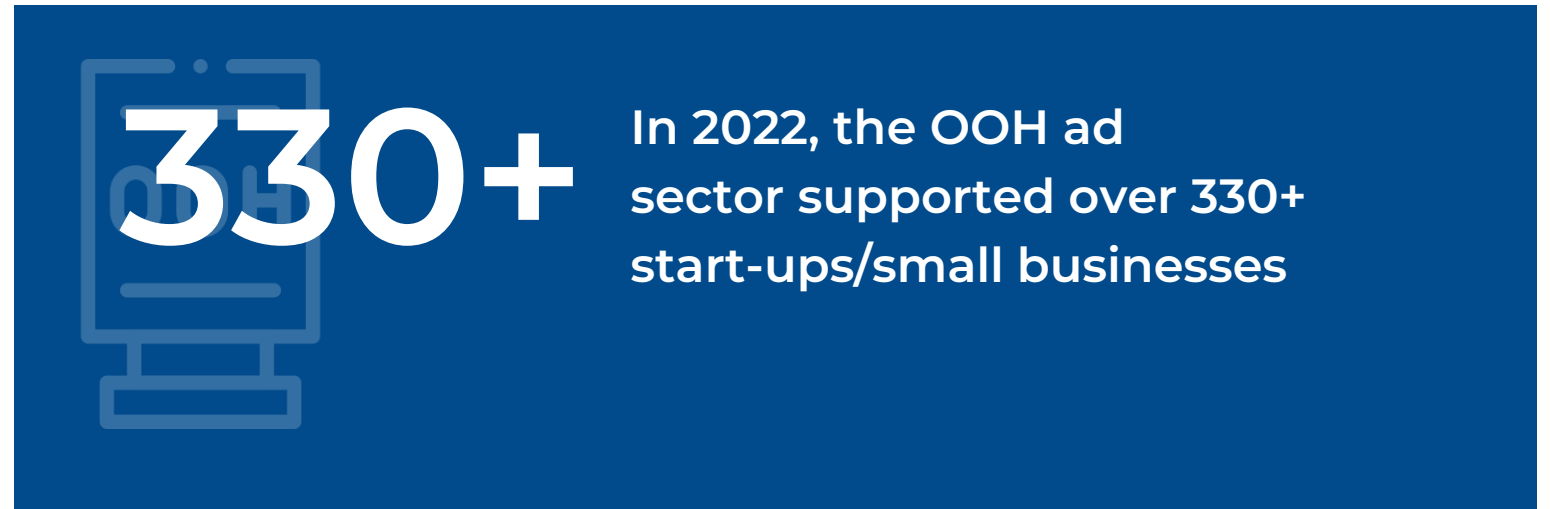
IT PAYS BACK

## Empowers small businesses

When you think of Out-of-Home advertising, it's often the 'big brand' campaigns that jump out at you. The ones with a hefty media budget and a full creative team that always produce show-stopping ads.

But the very nature and characteristics of OOH makes it absolute gold-dust for local businesses and start-ups. It empowers small local brands to become global players which adds fuel to London's economic fire.

It can be used in a targeted way, with a relevant message, in a relevant location to a relevant audience. It's the perfect solution to levelling-up on a limited budget.



IT PAYS BACK

# Empowers small businesses

## Celebrating our community heroes

250 free digital campaigns were awarded to local business owners who worked tirelessly supporting their communities throughout the pandemic.





IT PAYS BACK

# Empowers small businesses

## Backing diverse founders

Boxx, FoodLlama, Ruka, and Sojo were the winners of an initiative set up by OOH and the Black Founders Fund by Google for Start-ups.

Each winner received funded outdoor media as well as support with campaign planning, targeting and delivery to maximise the impact and effectiveness of each campaign.







**It gives  
back**

Out-of-Home advertising isn't just about great design, engaging copy or creating eye-catching, memorable ads that will put your brand's name on everyone's lips.

**It's far more than that.**

It's about giving back to the local communities that are an essential part of its fabric.

And that's the beauty of OOH. It gives back and it keeps on giving.

**That's a pretty bold statement.**

**But one we're confident in.**



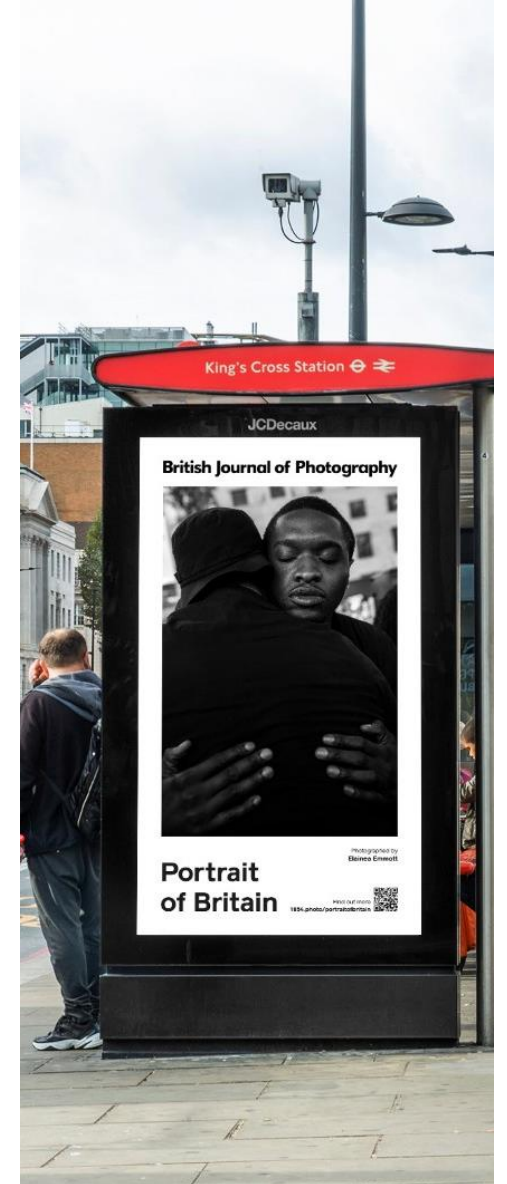
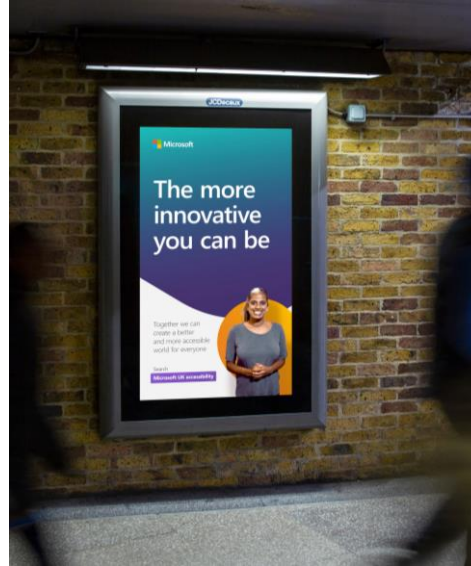


IT GIVES BACK

# Trailblazes diversity and inclusivity

It's a trusted and radically inclusive form of advertising that delivers the same message to huge audiences.

Research found that "OOH is not only one of the strongest channels for delivering inclusive messages, but also one of the best at reaching diverse audiences."





IT GIVES BACK

# Trailblazes diversity and inclusivity

## LGBTQ+ History Month

The series of seven posters featured little known facts and insights about LGBTQ+ history and finally sets the record (that not all history is) straight.





IT GIVES BACK

# Trailblazes diversity and inclusivity

'The world I want to see'

One year on from the murder of George Floyd, the Outdoor advertising sector teamed up with Cephias William and Mind to promote a message of hope from black boys in the communities across Hammersmith, Fulham, Ealing and Hounslow.



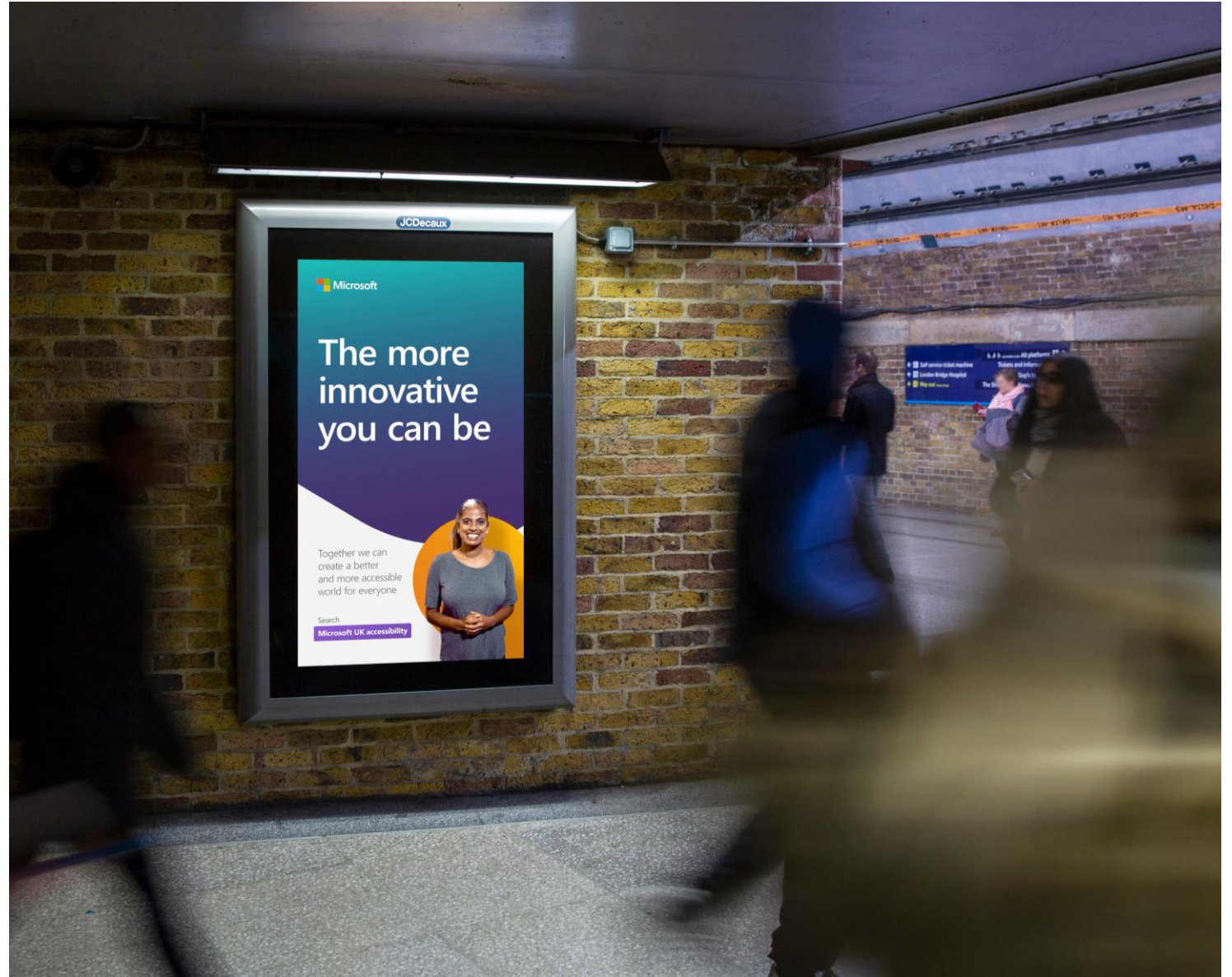


IT GIVES BACK

# Trailblazes diversity and inclusivity

Making OOH history with British Sign Language (BSL)

Microsoft ran the nation's first-ever digital outdoor campaign that featured BSL. The campaign highlighted the importance of accessibility in driving innovation.





IT GIVES BACK

# Trailblazes diversity and inclusivity

## Portrait of Britain

The UK's biggest annual photography exhibition in collaboration with the British Journal of Photography.

100 winning portraits are exhibited in a month-long digital exhibition designed to illustrate the diversity of life in modern Britain.



IT GIVES BACK

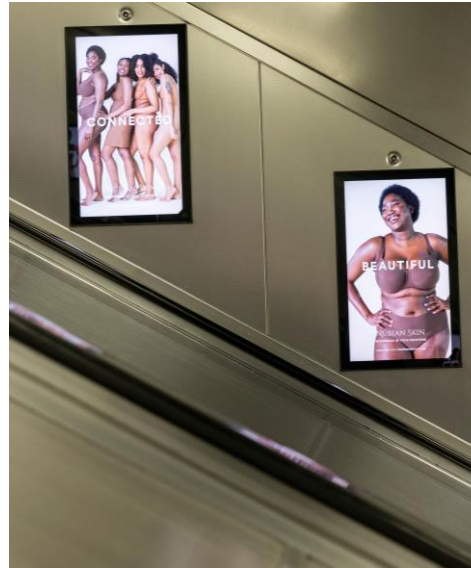
# Trailblazes diversity and inclusivity

## Diversity in Advertising Competition

Transport for London launched the competition back in 2018, in partnership with the Mayor of London. Its first competition focused on featuring authentic representations of London's Black, Asian or Minority Ethnic communities.

Then in 2019 entrants submitted campaigns that challenged attitudes around gender inequality and the representation of women.

The last competition in 2020 delivered a campaign that challenged ageism in advertising.





IT GIVES BACK

## Supports good causes

OOH presents a phenomenal opportunity to drive positive change.

It mobilises businesses to do-good. Millions of pounds are raised each year for the causes and communities that need it most.

It can help companies live out their values through the charities they support – from

donating media space to empowering employees to get involved through volunteering.

**OOH is the perfect platform to advocate for a fairer and better world.**



100+

**In 2022, Outdoor media channels supported over 100 London charities\***

\*Global's Make Some Noise, JCDecaux's The Community Channel, Clear Channel's A Platform for Good



IT GIVES BACK

# Supports good causes

## Breaking down barriers in Media

Global Academy is a University Technical College founded in 2016 to help reduce barriers of entry into the media industry and improve sector diversity.

The school was founded and is sponsored by Global, the Media & Entertainment group. It is also sponsored by University of the Arts London.





IT GIVES BACK

# Supports good causes

## Championing healthy lifestyles

As part of the Childhood Obesity Trailblazer Project, Lewisham's young residents collaborated on the design of a new poster to be displayed on 12 digital screens along Lewisham High Street to promote locally tailored public health campaigns and encourage healthy lifestyle choices.





IT GIVES BACK

# Supports good causes

## Missing people prevention campaign

Missing People launched their first preventative campaign to reach people thinking of going missing and extend the message of hope to people in crisis.





IT GIVES BACK

# Supports good causes

## Stamping out violence #AllMenCan

OOH owners donated 6,000 sites to support the #AllMenCan anti-violence campaign, prompted by calls to improve women's safety following the death of Sarah Everard.



IT GIVES BACK

# Supports good causes

## Looking ahead for dementia

Contagious launched a two-week creative campaign worth £150,000 across the TfL network. Wayback, a virtual reality film series designed for those living with dementia and their carers created the winning campaign that will 'inspire people to Look ahead'.





IT GIVES BACK

# Supports good causes

## Taking a stand against suicide with CALM

For World Mental Health Day, the Campaign Against Living Miserably (CALM), launched their powerful STAY campaign to promote their life-saving services. They benefitted from OOH funding and their campaign rolled out across the advertising estate.

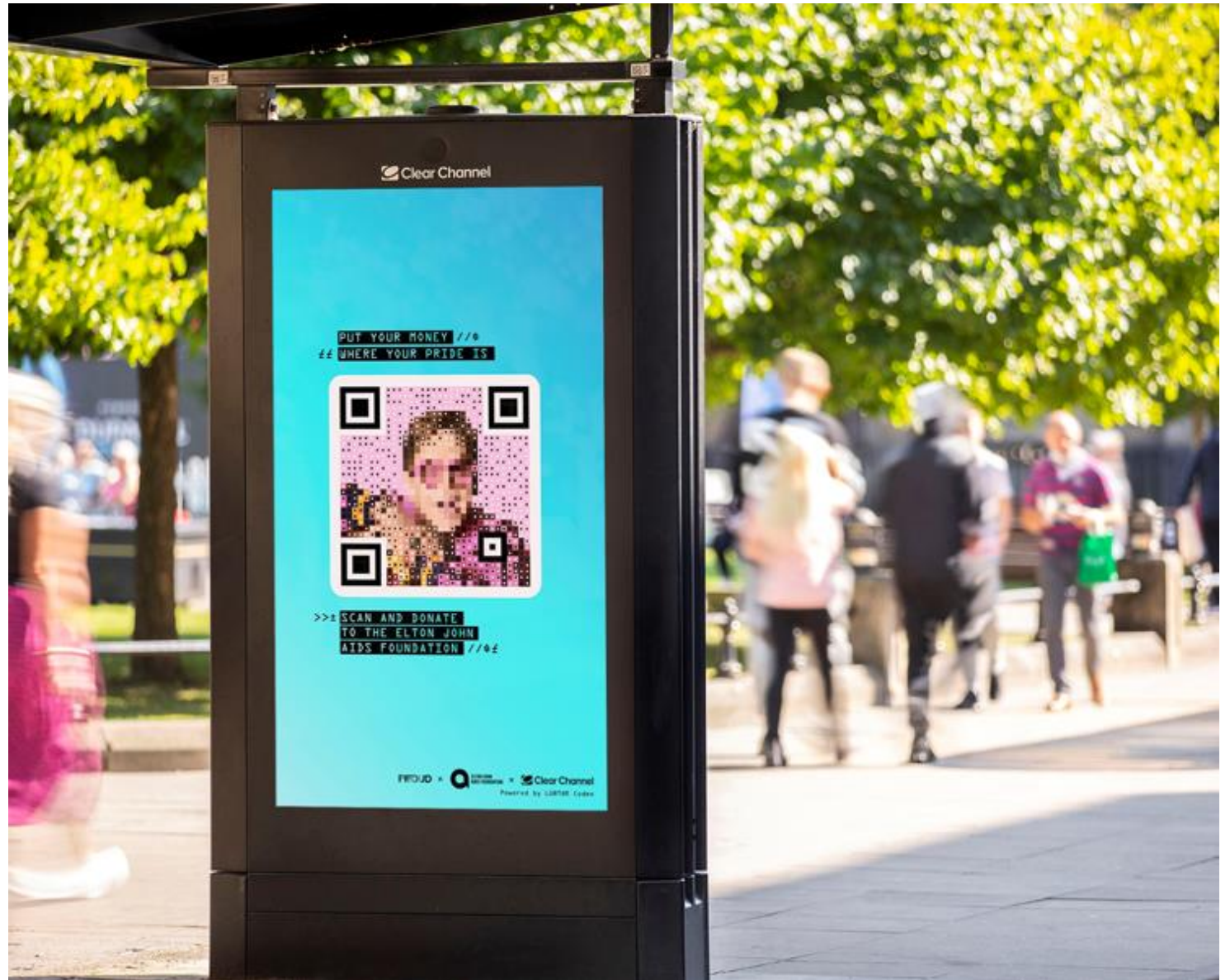


IT GIVES BACK

# Supports good causes

## The Elton John AIDS Foundation launches LGBT-QR codes

An iconic image of Sir Elton John was transformed into an LGBT-QR Code – a new fundraising mechanic which turns functional monochrome QR codes into instantly-recognisable design icons. Each LGBT-QR Code took users to a donation page for the charity.





IT GIVES BACK

# Supports good causes

## A moment Alzheimer's will never forget

Alzheimer's Society received free space for a campaign that highlighted a new, ground-breaking development in Alzheimer's disease treatment and encouraged the public to donate to help fund further research.



IT GIVES BACK

# Supports good causes

## The Mayor's annual Winter Rough Sleeping Fundraising Campaign

Sadiq Khan launched a campaign to help the hundreds of Londoners at risk of sleeping rough during winter. The OOH ad sector sponsored digital screens across Hounslow and the Capital.



Sadiq Khan  
The Mayor of London

Since becoming Mayor, I've made it a personal priority to tackle rough sleeping, helping a record 13,500 people off the streets through our support services as we work to build a fairer London for all. I would like to thank JCDecaux's Community Channel for their continued support of my winter rough sleeping campaign, raising vital funds for London's rough sleeping charities and encouraging Londoners to connect people they see sleeping rough with support services through Streetlink.



IT GIVE BACK

# Spotlights the arts

OOH advertising is the ideal canvas to shine a spotlight on London's booming creative sector.

The possibilities of Out-of-Home stretch beyond imagination; from celebrating the latest innovative technology and waving the flag for both emerging and established artists to bringing arts to the streets for all to enjoy.





IT GIVES BACK

# Spotlights the arts

## The Year 3 Project

A major exhibition at the Tate offered a glimpse of the capital's future, a hopeful portrait of a generation to come. Film Director, Steve McQueen, invited every Year 3 pupil in London to have their photograph taken by Tate photographers, then brought them together into a single large-scale installation.

The Year 3 Project appeared on over 600 billboards on the streets, on railway platforms and at London Underground stations across all 33 London boroughs.





IT GIVES BACK

# Spotlights the arts

## Picturing High Streets

Historic England, in conjunction with Photoworks, announced a major national photography competition 'Picturing High Streets', inviting people to look at the high street as never before, charting and celebrating the history and experiences of the people and places that make up an often-overlooked fixture in all our lives.



IT GIVES BACK

# Spotlights the arts

## Promoting ethically diverse artists

In 2021, Pocc Art Fund partnered with Shutterstock to promote 41 underrepresented and overlooked Black, Brown and ethnically diverse artists. Free outdoor media space was given to artists to promote their work as well as a £15,000 investment in grants.

Across the year, Pocc launched four themes for artists to respond to in a bid to support a diverse range of creators with unique perspectives on topics that are relevant to the world today.





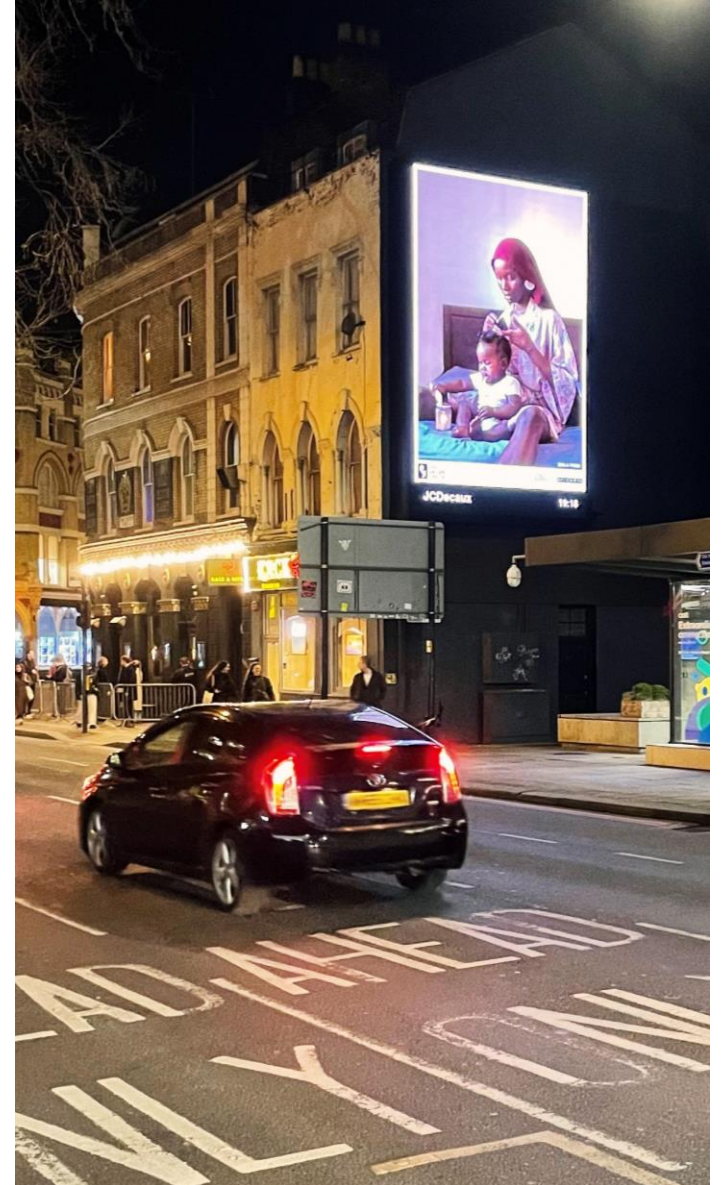
IT GIVES BACK

# Spotlights the arts

## The Gallery

Arts producers Artichoke were on a mission to break down barriers and make art accessible through an outdoor gallery. They used OOH advertising to put thought-provoking pieces into the heart of public conversations.

The first exhibition is made up of photography, illustration and digital prints and depicts ten artists individual takes on the theme 'Straight White Male' and 'The State We're In'.





It's  
trustworthy



IT'S TRUSTWORTHY

# A reliable advertising channel

OOH is a neutral medium. It doesn't have a bias, doesn't lean to the left or the right.

It's the oldest form of advertising too. London's OOH heritage traces back beyond the nineteenth century, but over the last 150 years we've developed a unique relationship with Out-of-Home advertising – it's one of reciprocity, reliance and trust.



**Because it's out there for all eyes to see it, we believe it.**

That's thanks to the Advertising Standards Authority (ASA), the UK's independent regulator. Founded in 1962, ASA assesses ads the public deem to be problematic. ASA's motto is **'Legal, Decent, Honest, Truthful.'**

**And guess what?**

Of the 22,869 adverts that the ASA assessed in 2021, just 2% were Out-of-Home.

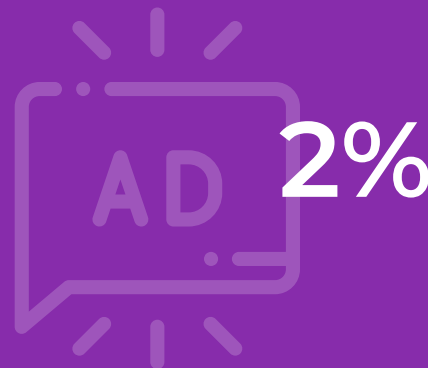
In 2021 the ASA assessed a total of 22,869 adverts:

67%

online or email ads

21%

TV ads



OOH ads

\*\* ASA Annual Report 2021

IT'S TRUSTWORTHY

# Transforms attitudes and shapes view-points

Because OOH media is such a trusted form of advertising, it's also a gateway for change. We have a long history of harnessing its public power to transform attitudes, tackle prejudices, shape viewpoints and offer new ways of seeing the world.





IT'S TRUSTWORTHY

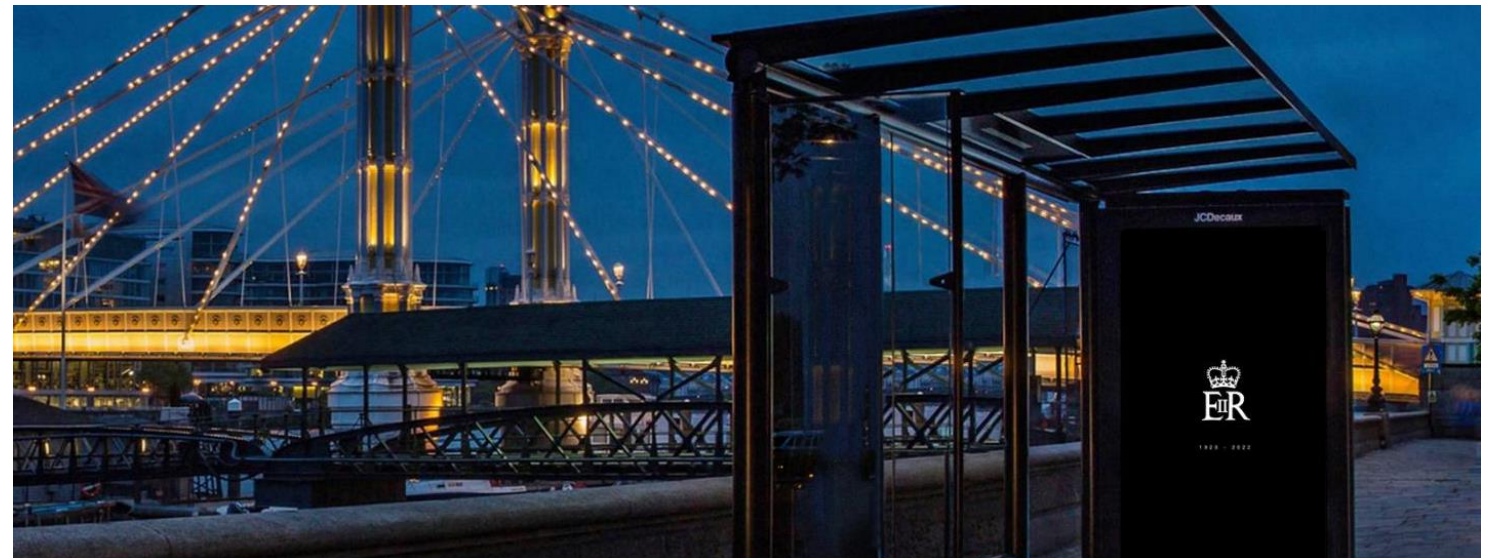
## Mirrors real-life

OOH cuts through the noise and meets us exactly where we're at.

It's a cultural marker that mirrors what's going on in the wider world. It reflects, it represents, it relates.

Think Covid, clapping for carers, #stayhomesavelives and the national outpouring for her late Majesty Queen Elizabeth II.

All these ads were those of the moment. They were the voice of public sentiment. And authenticity is what makes these so real.





It's  
reducing its  
environmental  
impact



We have seen significant investment from TfL and the transport industry to reduce its environmental impact. From the introduction of cleaner and greener London buses that all meet or exceed Euro VI emission standards, to the design and build of the new Elizabeth line which brings environmental sustainability across the route.

Safe biodiverse stations, lighter, more energy-efficient trains and state-of-the-art advertising sites, purpose built in the wondrous architecture are just some of the initiatives driving a more sustainable agenda.

### Likewise, Out-of-Home is on a mission to reduce its environmental impact.

Thanks to being a one-to-many channel, outdoor ads make maximum impact with minimal output. One ad can be seen by hundreds of thousands of people, which is why OOH is amongst the most carbon efficient medium.

All the largest OOH media and infrastructure businesses have established aligned Carbon Net Zero targets and strategies. They are signing up to ambitious advertising industry commitments to make sure the sector is doing people and planet the power of good.

### Here are examples of what different OOH companies have been doing so far:

- ✓ **100%** renewable energy is used in media owned sites
- ✓ Screens are **powered down** at night (subject to public safety obligations)
- ✓ Significant investment in developing **greener materials** – like non-PVC vinyl and recyclable advertising boards
- ✓ Recycling old ads or **reclaiming energy**
- ✓ Rolling out **advanced screen technology** like LED and Solar lighting, particularly at bus shelters
- ✓ Introducing new technologies that can **monitor and improve local air quality**

REDUCES  
ENVIRONMENTAL IMPACT

# Industry commitments and beyond

## Accreditation

### Planet Mark

Each organisation has a business certification from Planet Mark. The certification recognises the commitment to continuous improvement; measuring and reducing a business' carbon emissions, energy and water consumption, travel and waste.

## Environmental Partnerships



## Commitments

### Ad Net Zero

An industry initiative led by the Advertising Association that aims to become net zero by 2030.

### Organisations commit to:

- ✓ Curbing emissions from ad production
- ✓ Curbing emissions from media planning and buying
- ✓ Curbing emissions through awards and events
- ✓ Using power to drive positive consumer change



REDUCES  
ENVIRONMENTAL IMPACT

# Investing in green infrastructure

## Cultivating biodiversity at Bee Bus Stops a.k.a. Buzz Stops

The Living Roofs have been specially designed in partnership with expert ecologists to support native biodiversity, help create healthier local communities, and bring greenery back into urban areas. The OOH ad industry aim to create at least 1,000 Buzz Stops in the UK.





REDUCES  
ENVIRONMENTAL IMPACT

# Powering environmental projects

## Revitalising River Roding

Eco-heroes in Barking and Dagenham have been planting trees and building benches as part of an ambitious £20,000 re-greening and rejuvenation project along the River Roding in Barking – funded by OOH media channels. In total, 60 semi-mature trees have been planted at 10 sites along the river.

Dozens of benches have also been installed to give local people somewhere to sit and enjoy the scenery.





REDUCES  
ENVIRONMENTAL IMPACT

# Powering environmental projects

## Transforming Hounslow Canal

Great West Road is an important employment location within West London and home to major company's global headquarters. But the 'Golden Mile' suffers from a lack of cultural dynamism, access to amenities and the Grand Union Canal's undesirable walkway – all hampering new talent attraction to the area.

The OOH sector teamed up with GSK, Sky and Holiday Inn to create a tidier, safer area for residents and urban workers to pass through or use of leisure purposes.





# So, there you have it.

The back story.

The giving back story.

The giving back to London story.

Out-of-Home advertising might be the oldest form of advertising but its impact is as fresh and revolutionary today as it's ever been.

OOH pays back – from funding life saving street furniture and improving the air quality to empowering small business owners. The money comes full circle, pumped right back into the heart of London.

It gives back too. And keeps on giving. One ad campaign has the power to touch thousands of people through creating a more diverse and inclusive society, supporting good causes, and improving lives through art.

We trust OOH too. Its reputation as one of the most trusted advertising channels is worth its weight in gold. It's a revenue creator and change-maker. It can transform opinions as well as reach right in and meet people where they are.

And of course, Out-of-Home is a force for good. With concrete strategies, ambitious commitments and exciting collaborative partnerships, OOH is driving positive environmental change. For our people, our planet, and for London.





 Clear Channel



JCDecaux

OUTSMART

 Transport  
for London

