

Outdoor Industry Trend Report
1999 - 2008



OUTDOOR ADVERTISING
ASSOCIATION OF AMERICA, INC.

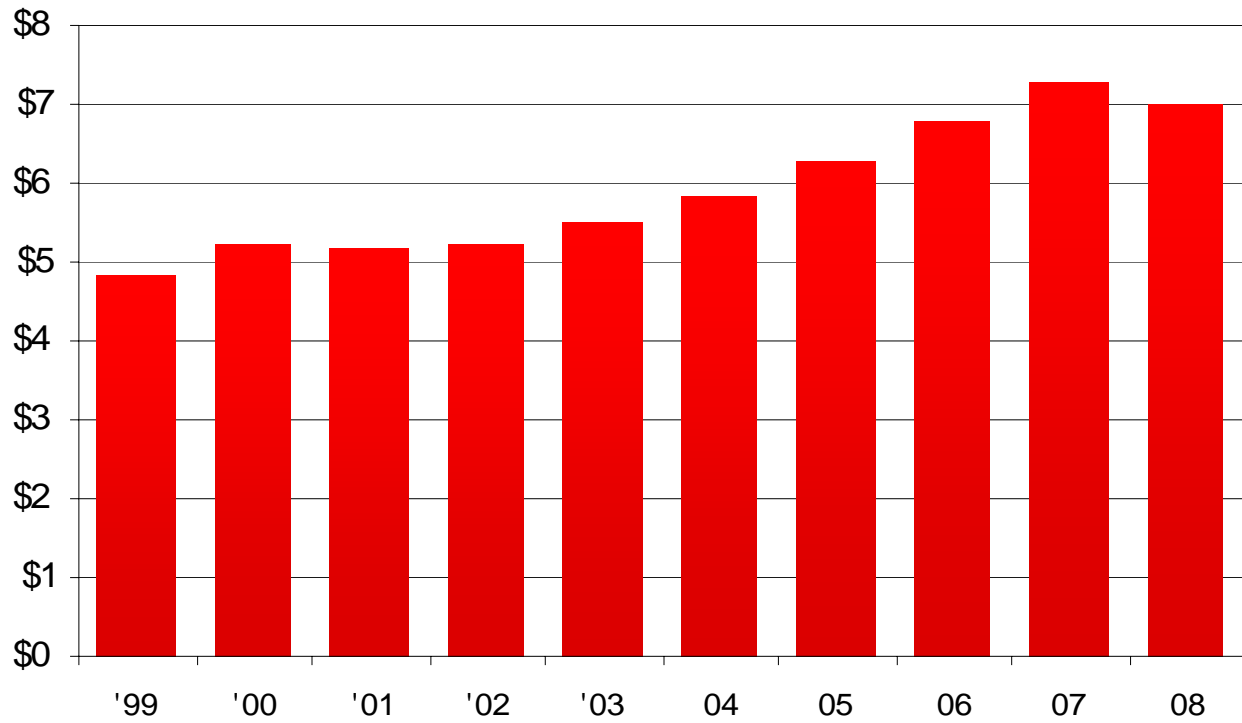
Outdoor Industry Trend Report

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Outdoor Revenue 1999 - 2008

Outdoor advertising revenue has grown almost 45 percent over the last decade.



Source: OAAA

INDUSTRY TRENDS

oaaa

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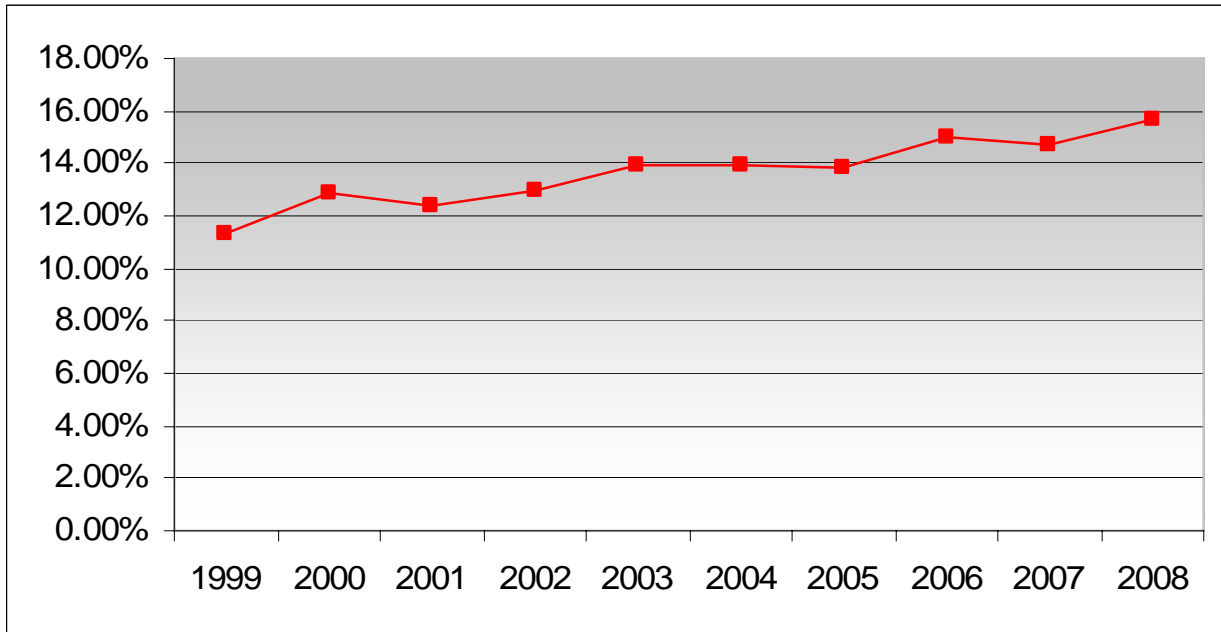
Ten Year Industry Rankings

Industry	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Misc Services & Amusements	1	1	1	1	1	1	1	1	1	1
Public Transportation, Hotels & Resorts	3	3	2	2	2	3	4	5	4	2
Retail	2	2	3	3	3	4	3	3	6	3
Media & Advertising	4	4	4	4	4	2	2	4	5	4
Insurance & Real Estate	8	9	8	7	7	5	5	2	2	5
Restaurants	5	5	5	5	5	7	7	7	7	7
Communications	10	6	7	9	10	10	8	6	3	6
Financial	9	10	9	8	8	6	6	8	8	8
Automotive Dealers & Services	6	7	6	6	6	8	9	9	9	9
Automotive, Automotive Access & Equip	7	8	10	11	9	9	10	10	10	11
Government, Politics & Organizations	12	13	12	12	12	11	12	11	11	10

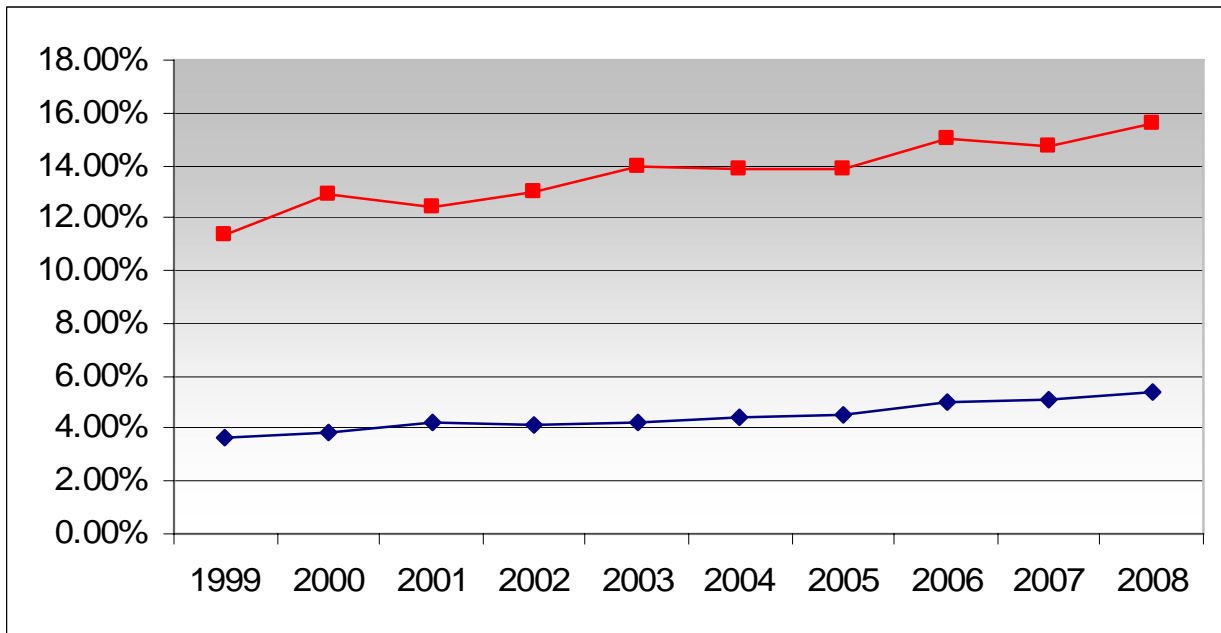
Source: TNS Media Intelligence

Misc. Services & Amusements

Below are the percentages of total outdoor advertising spending for the Misc. Services and Amusements industry for each year from 1999 through 2008.



The following graph compares the industry's spending on outdoor compared to all media expenditures from 1999 through 2008.

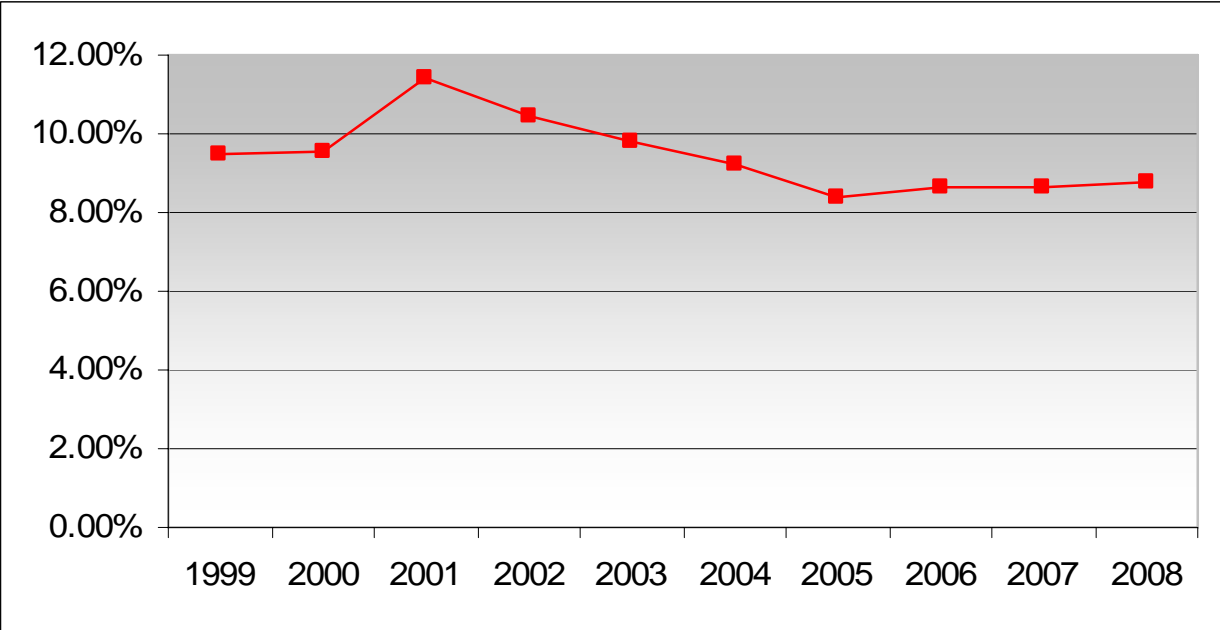


Source: TNS Media Intelligence, OAAA

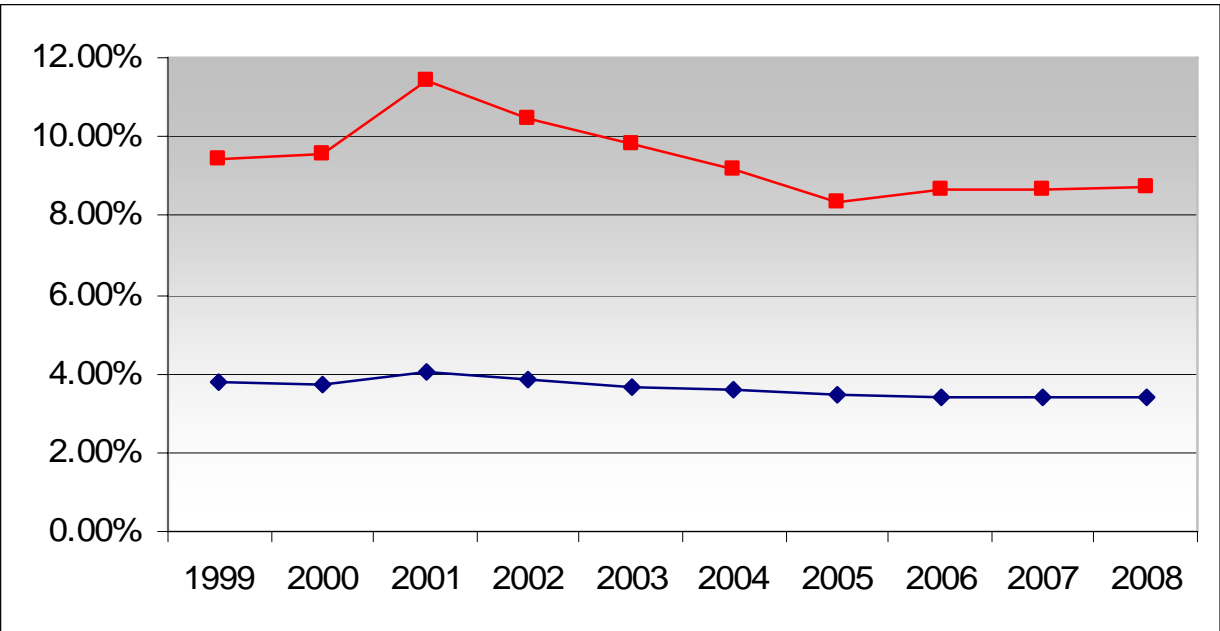
Outdoor All Media

Public Transportation, Hotels & Resorts

Below are the percentages of total outdoor advertising spending for the Public Transportation, Hotels & Resorts industry for each year from 1999 through 2008.



The following graph compares the industry's spending on outdoor compared to all media expenditures from 1999 through 2008.

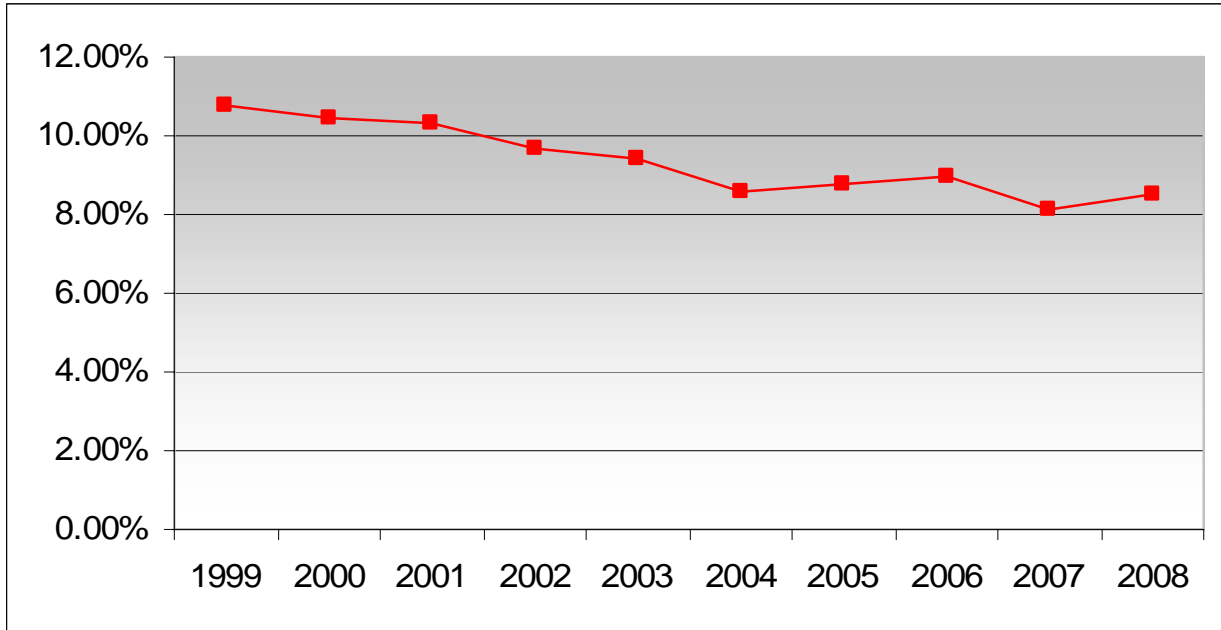


Source: TNS Media Intelligence, OAAA

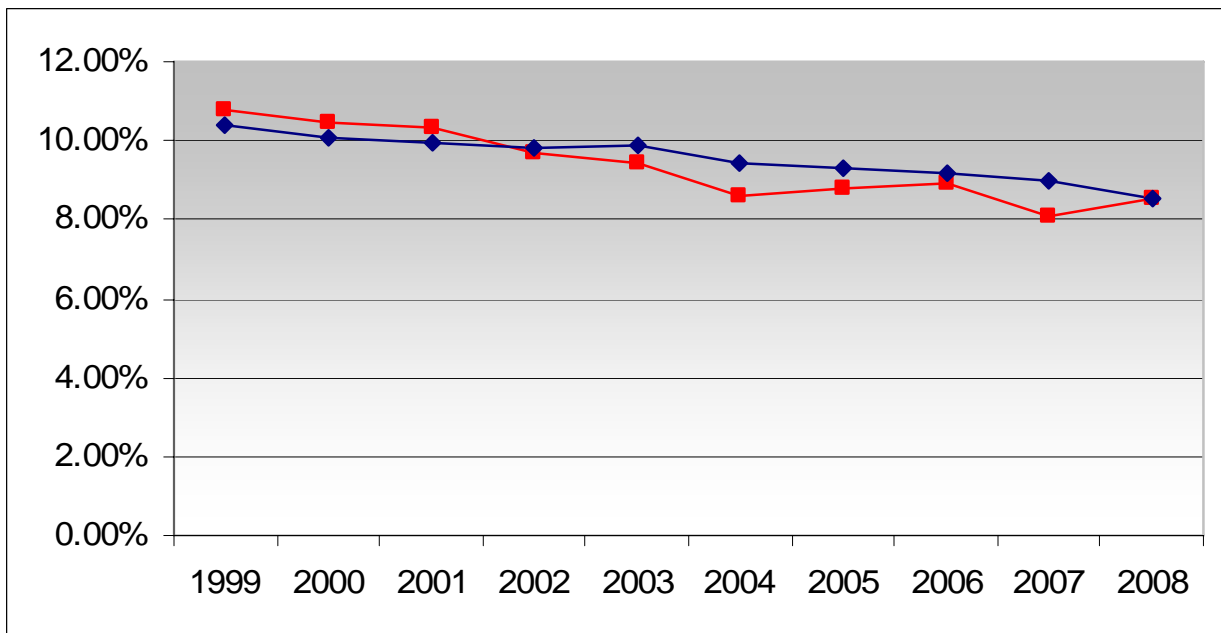
■ Outdoor ◆ All Media

Retail

Below are the percentages of total outdoor advertising spending for the Retail industry for each year from 1999 through 2008.



The following graph compares the industry's spending on outdoor compared to all media expenditures from 1999 through 2008.

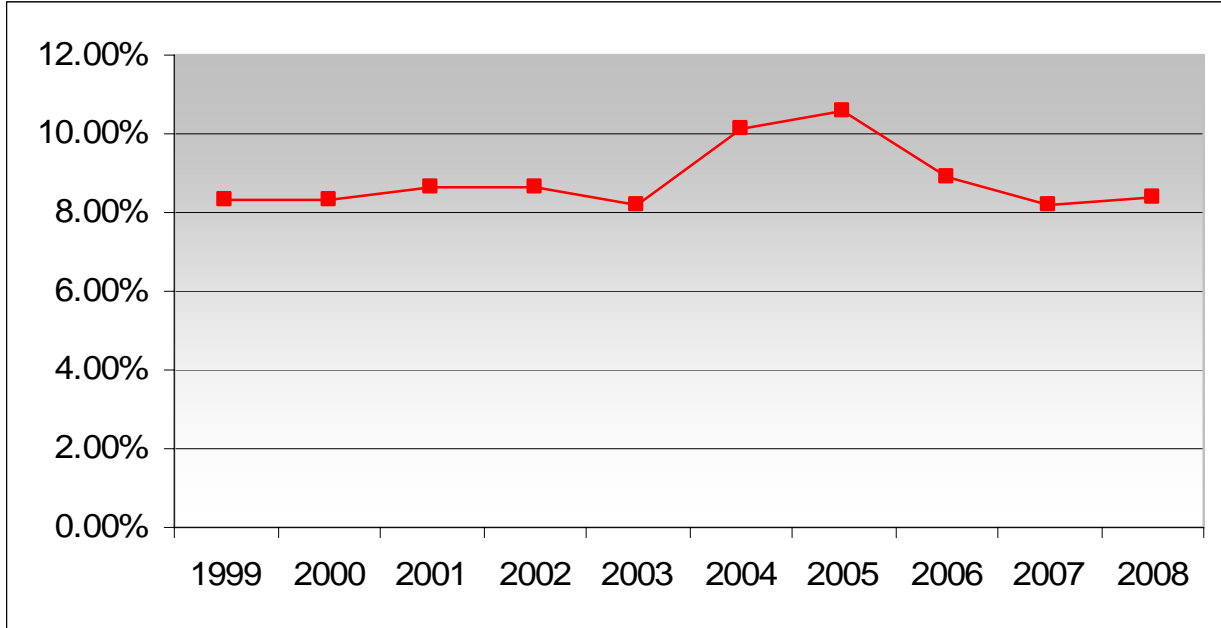


Source: TNS Media Intelligence, OAAA

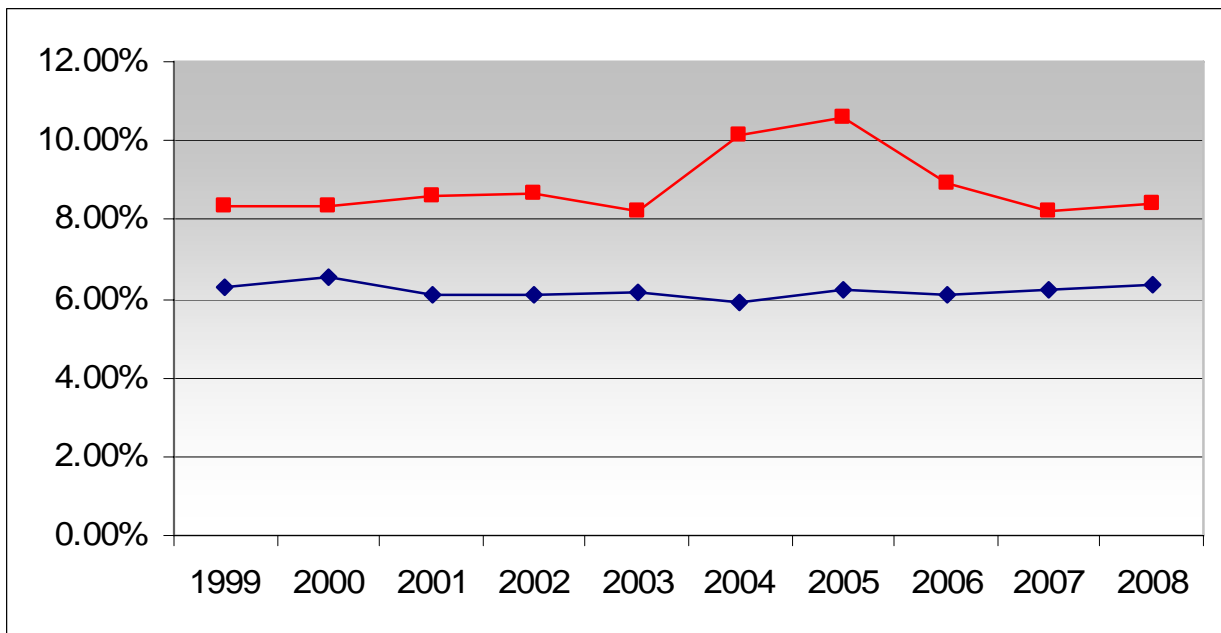
Outdoor All Media

Media & Advertising

Below are the percentages of total outdoor advertising spending for the Media & Advertising industry for each year from 1999 through 2008.



The following graph compares the industry's spending on outdoor compared to all media expenditures from 1999 through 2008.

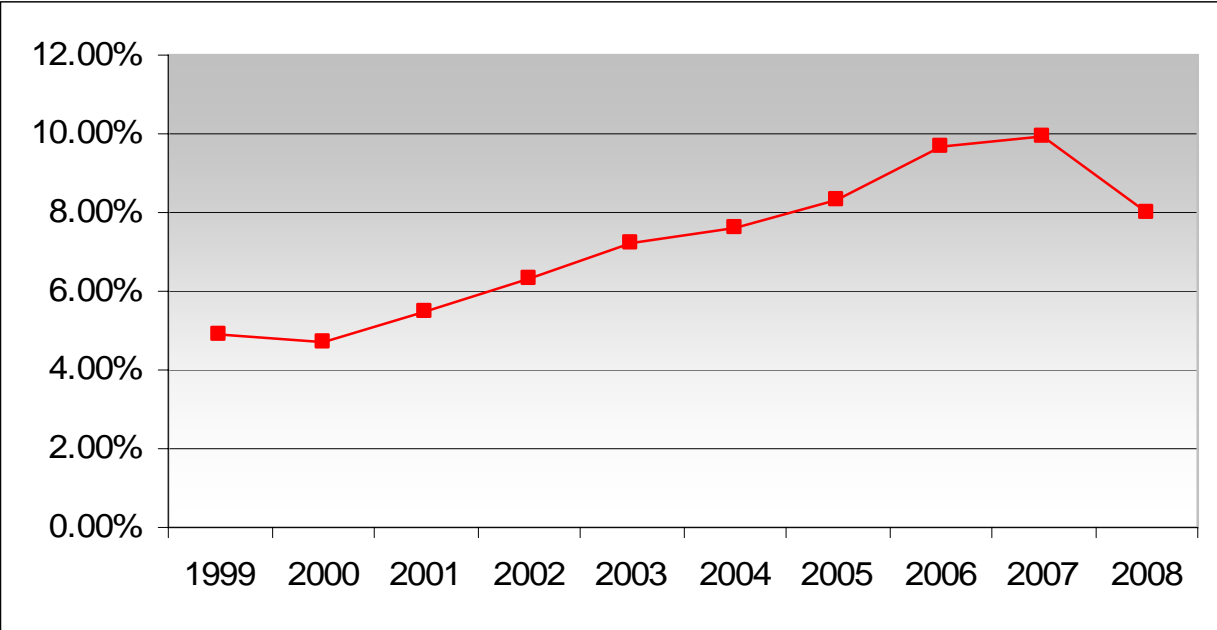


Source: TNS Media Intelligence, OAAA

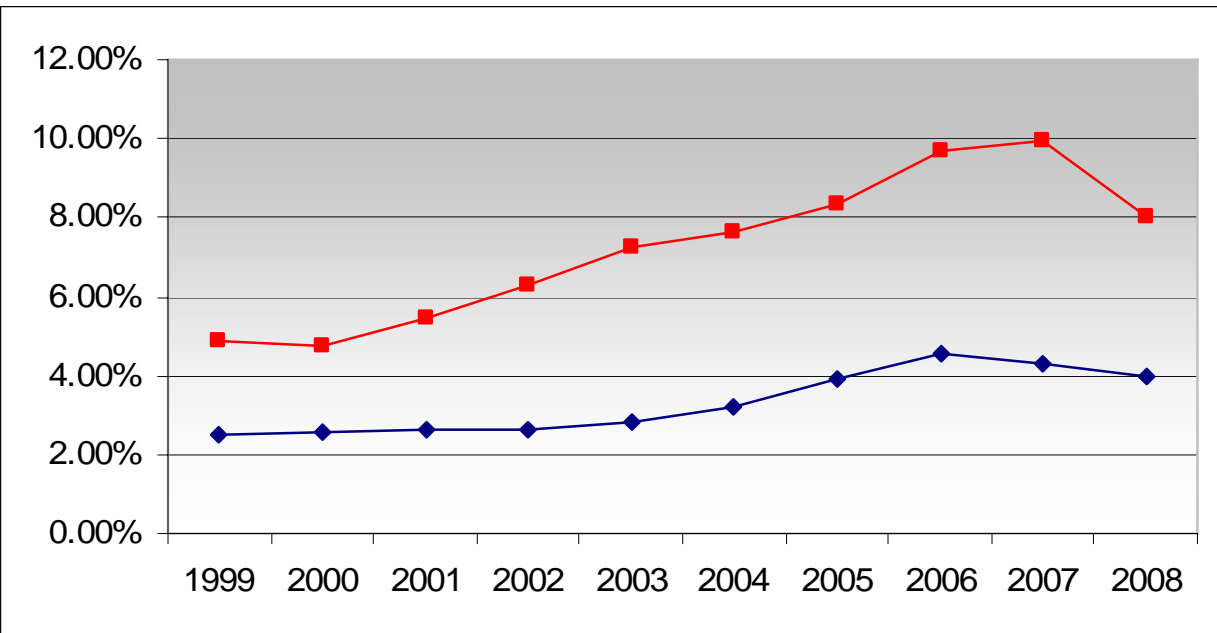
Outdoor All Media

Insurance & Real Estate

Below are the percentages of total outdoor advertising spending for the Insurance & Real Estate industry for each year from 1999 through 2008.



The following graph compares the industry's spending on outdoor compared to all media expenditures from 1999 through 2008.

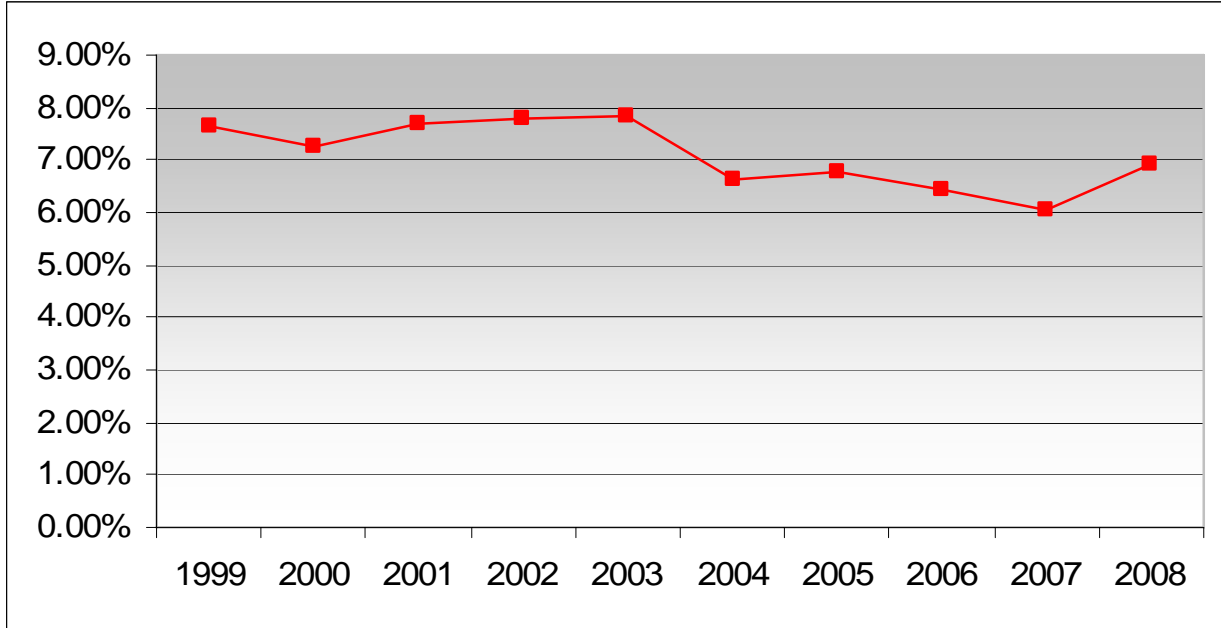


Source: TNS Media Intelligence, OAAA

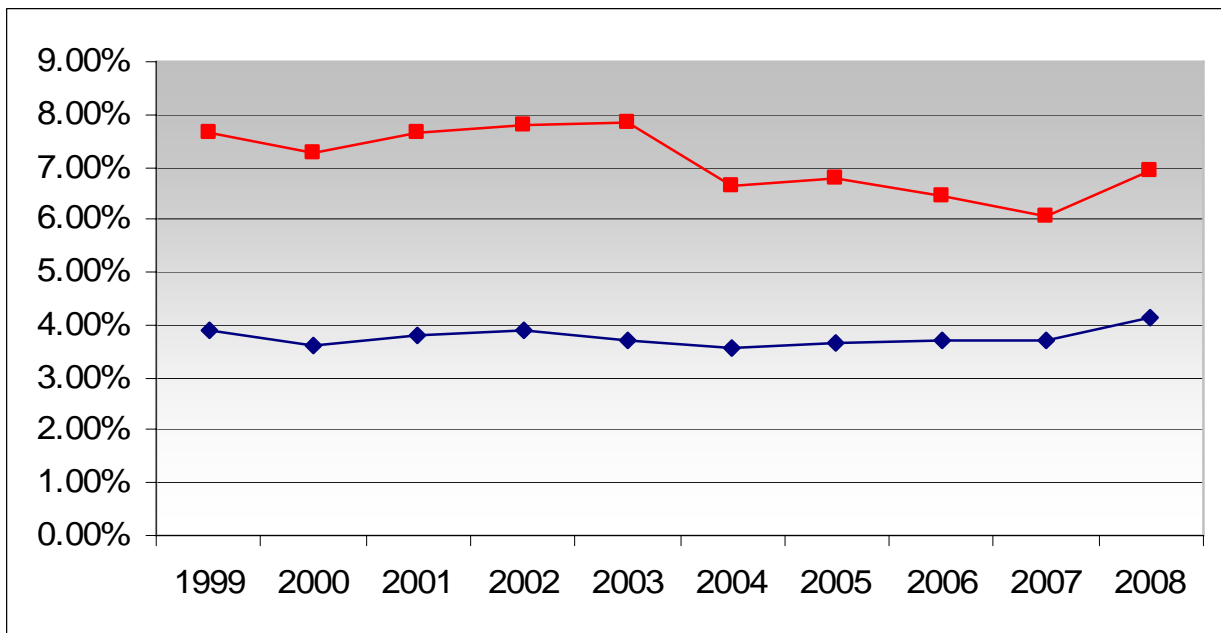
Outdoor All Media

Restaurants

Below are the percentages of total outdoor advertising spending for the Restaurants industry for each year from 1999 through 2008.



The following graph compares the industry's spending on outdoor compared to all media expenditures from 1999 through 2008.

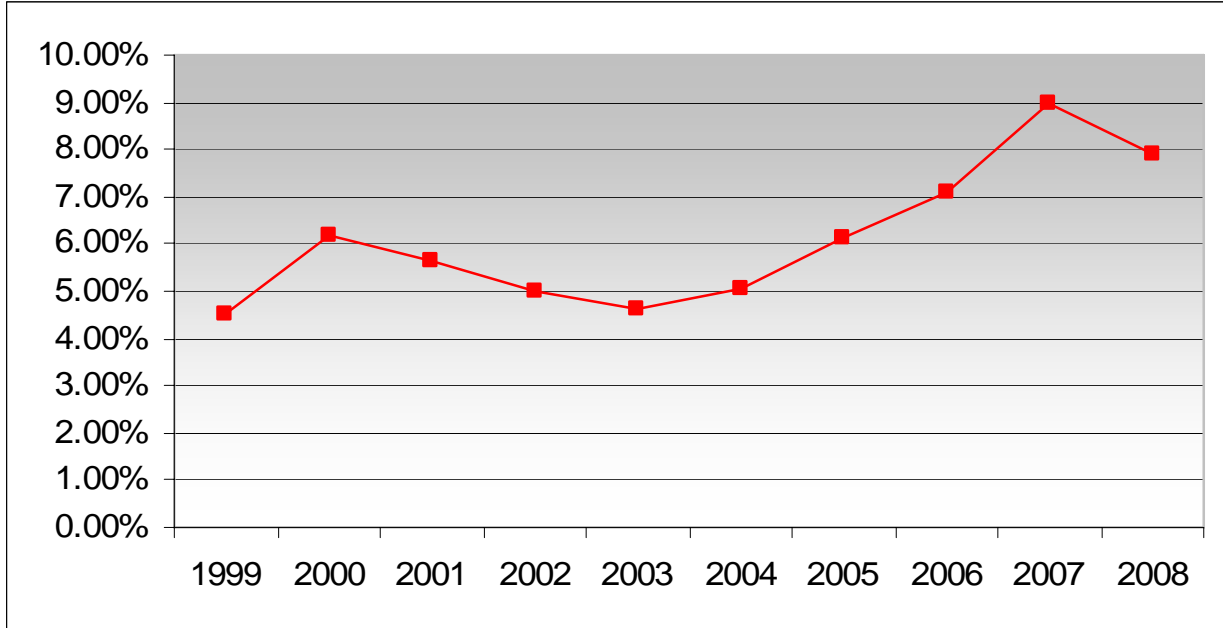


Source: TNS Media Intelligence, OAAA

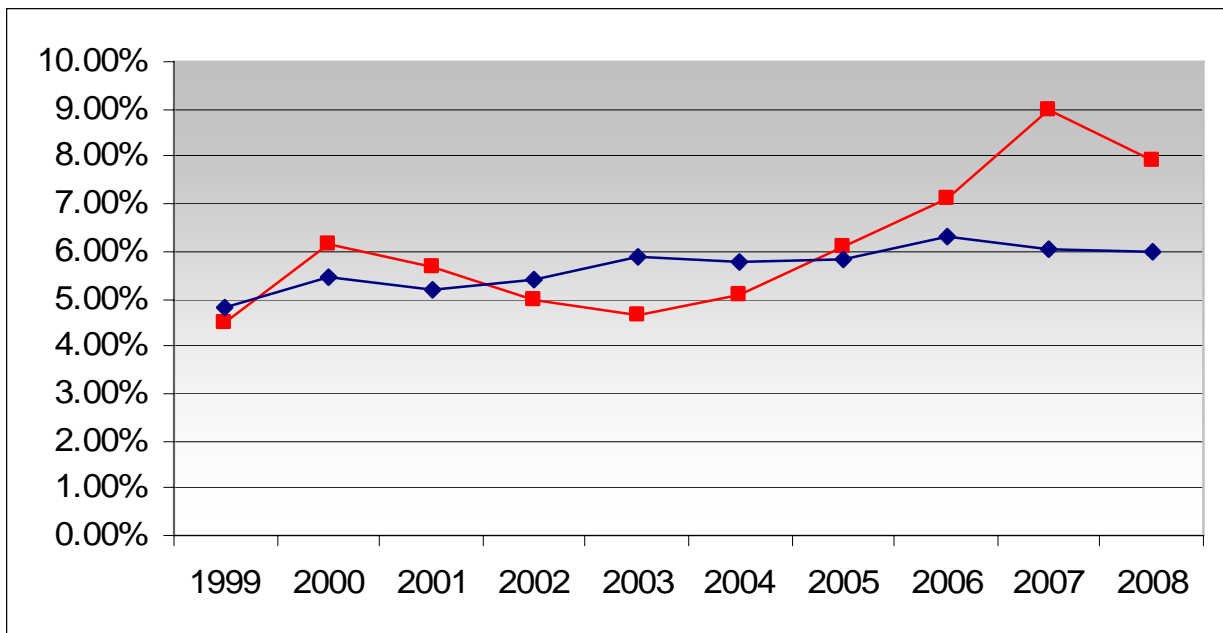
Outdoor All Media

Communications

Below are the percentages of total outdoor advertising spending for the Communications industry for each year from 1999 through 2008.



The following graph compares the industry's spending on outdoor compared to all media expenditures from 1999 through 2008.

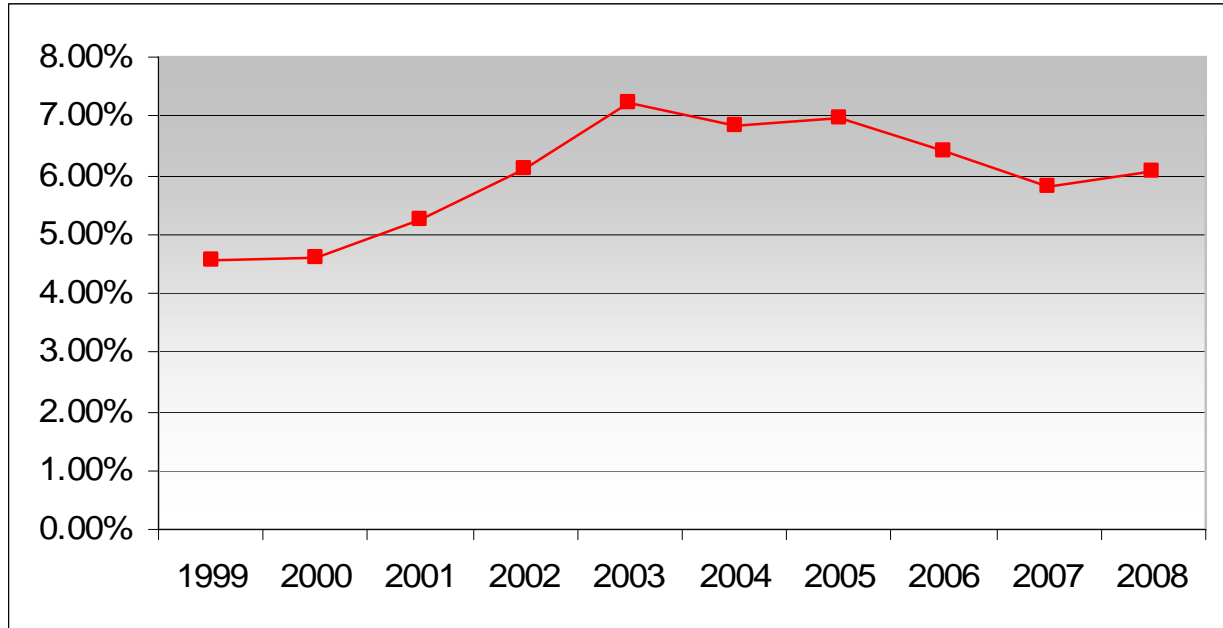


Source: TNS Media Intelligence, OAAA

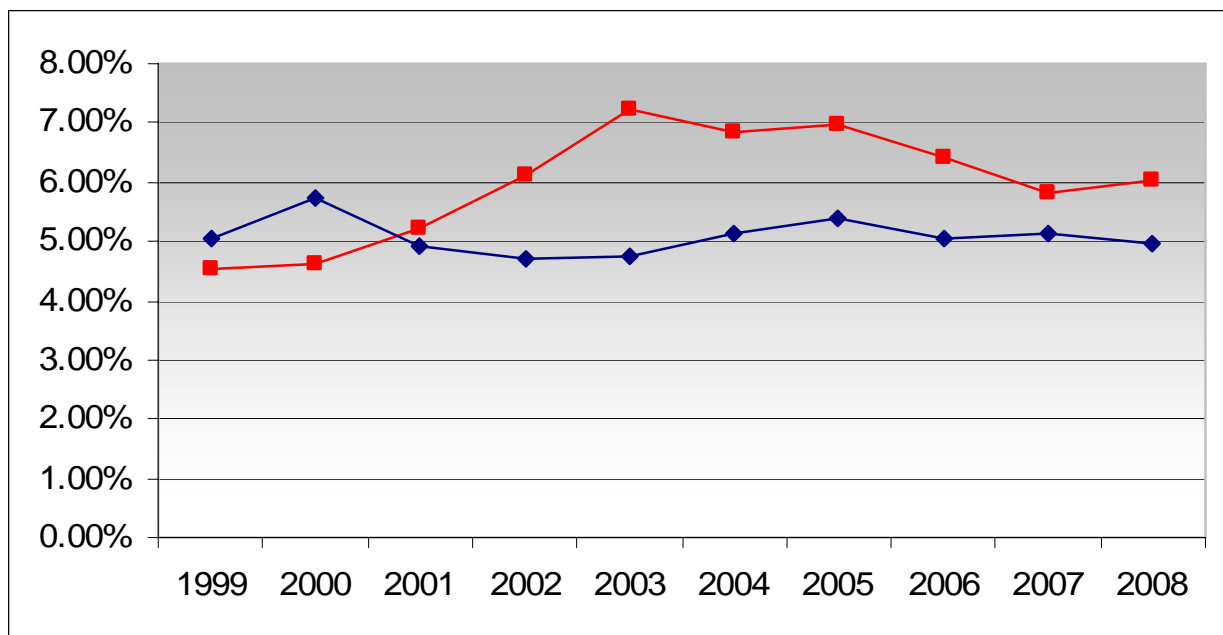
Outdoor All Media

Financial

Below are the percentages of total outdoor advertising spending for the Financial industry for each year from 1999 through 2008.



The following graph compares the industry's spending on outdoor compared to all media expenditures from 1999 through 2008.

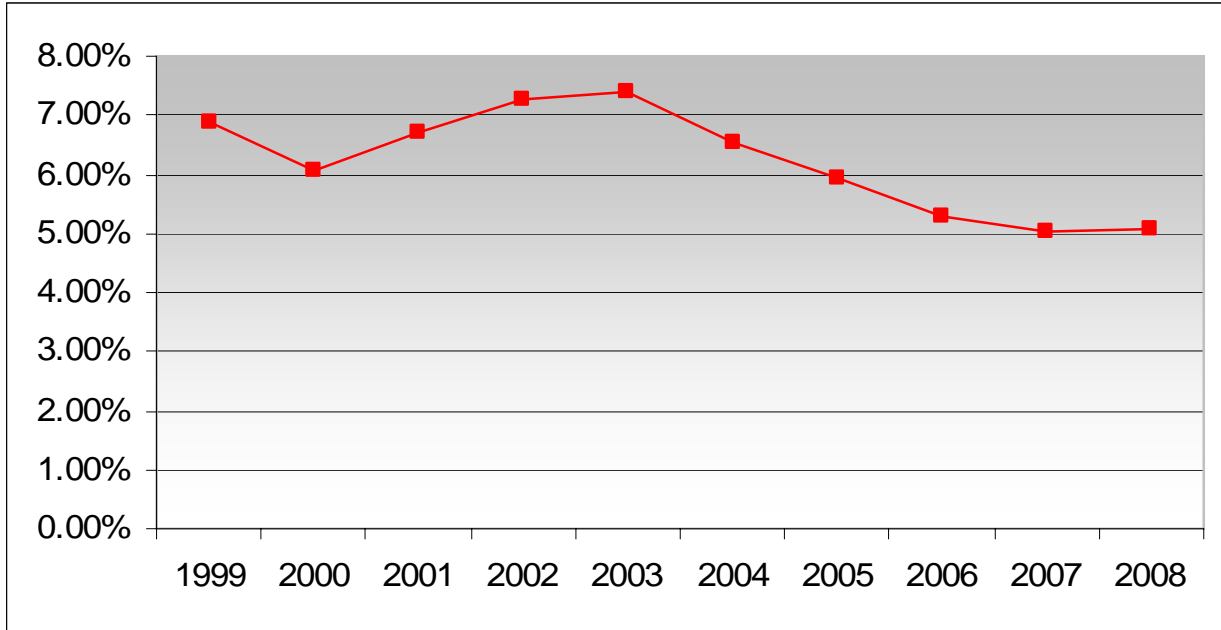


Source: TNS Media Intelligence, OAAA

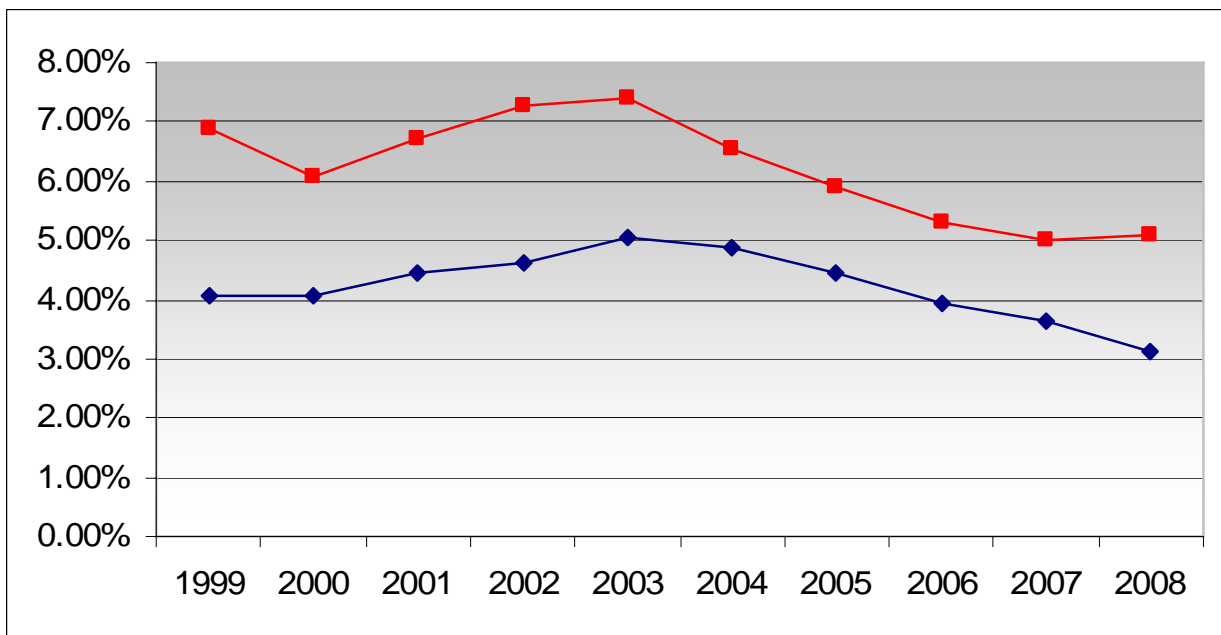
Outdoor All Media

Automotive Dealers & Services

Below are the percentages of total outdoor advertising spending for the Automotive Dealers & Services industry for each year from 1999 through 2008.



The following graph compares the industry's spending on outdoor compared to all media expenditures from 1999 through 2008.

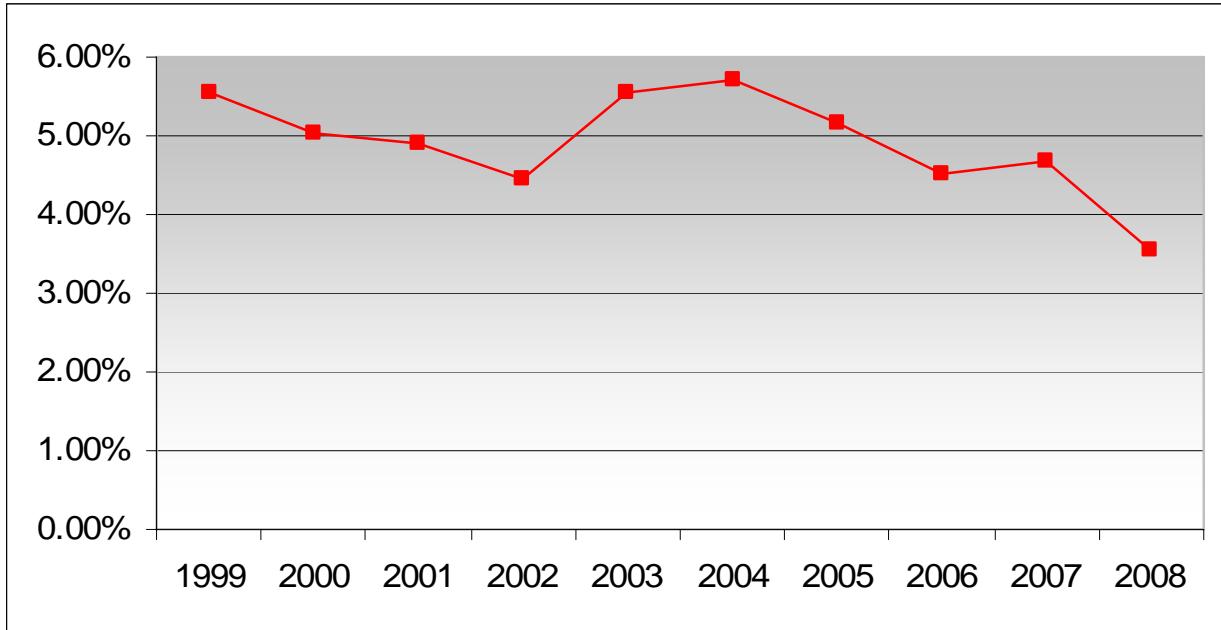


Source: TNS Media Intelligence, OAAA

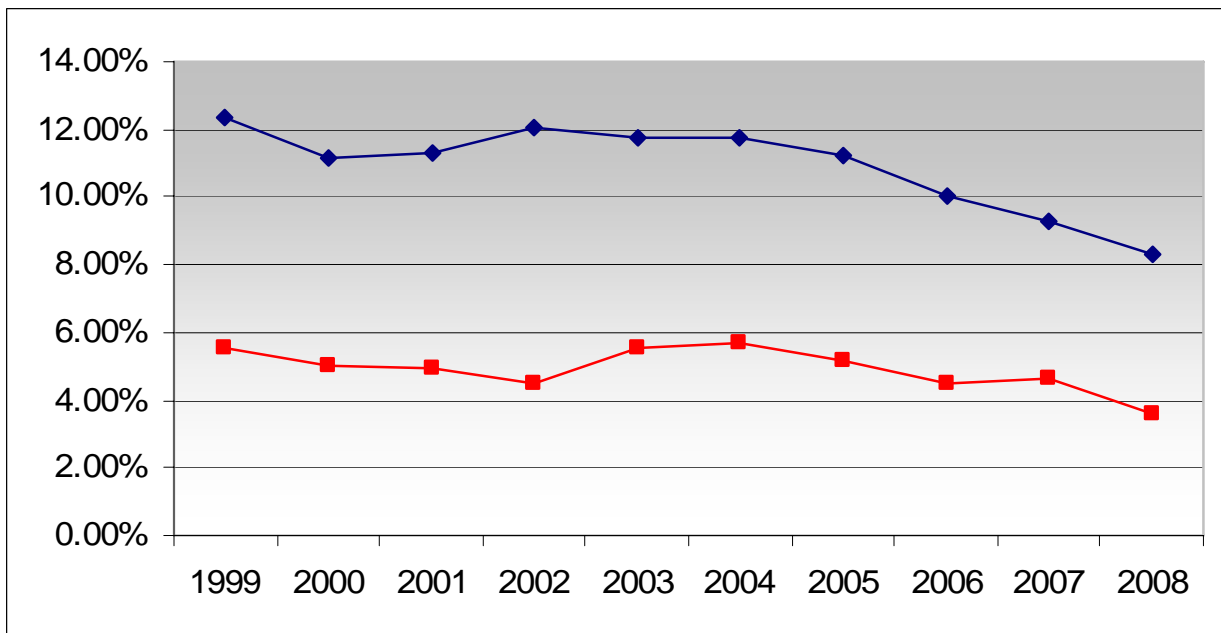
Outdoor All Media

Automotive, Automotive Access. & Equip.

Below are the percentages of total outdoor advertising spending for the Automotive, Automotive Access. & Equip. industry for each year from 1999 through 2008.



The following graph compares the industry's spending on outdoor compared to all media expenditures from 1999 through 2008.



Source: TNS Media Intelligence, OAAA

■ Outdoor ◆ All Media

CATEGORY TRENDS



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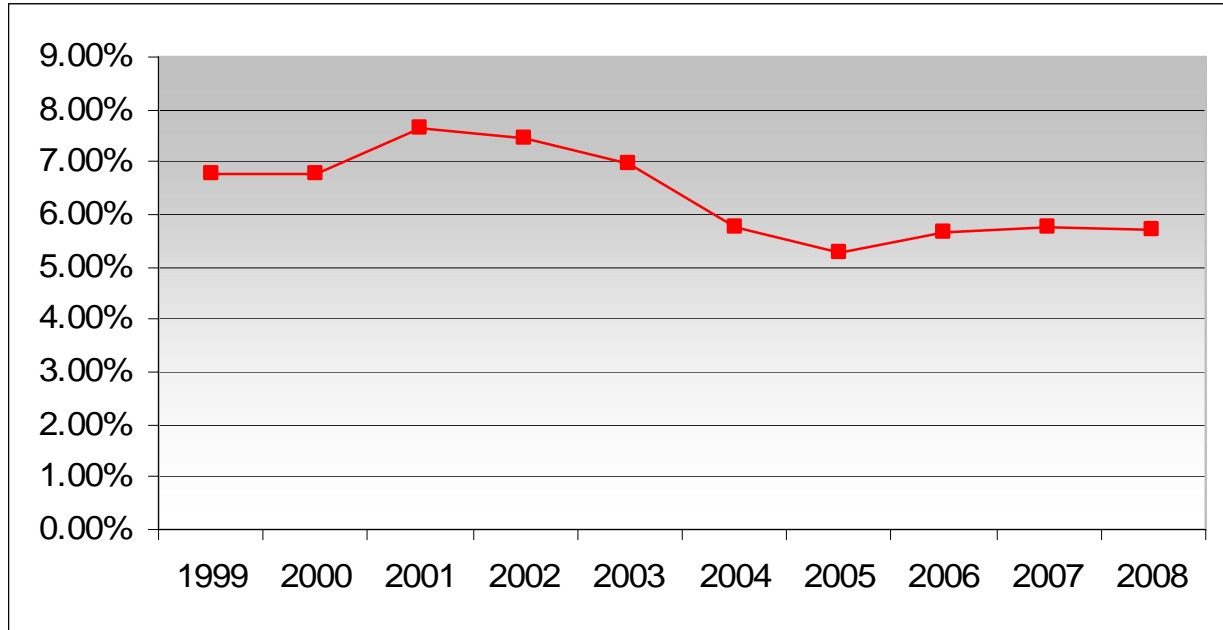
Ten Year Category Rankings

Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Hotels & Resorts, Domestic	1	1	1	1	1	1	1	1	1	1
Hospitals, Clinics & Medical Centers	5	7	4	4	3	3	3	3	4	2
Banking (Consumer)	7	5	6	3	2	2	2	4	5	4
Real Estate Developers & Developments	18	18	10	9	6	5	4	2	2	7
Quick Serve Restaurants	2	4	3	5	5	7	8	6	8	3
Regular Beer & Ale	6	3	2	2	4	6	6	7	9	9
Wireless Telecom Providers	14	10	5	7	9	9	5	5	3	6
Motion Pictures	22	21	9	8	8	4	7	8	7	5
Amusements & Events: Comb Copy & NEC	4	2	8	10	11	8	10	9	11	10
Casual Dining Restaurants	10	9	7	6	7	11	12	10	12	14

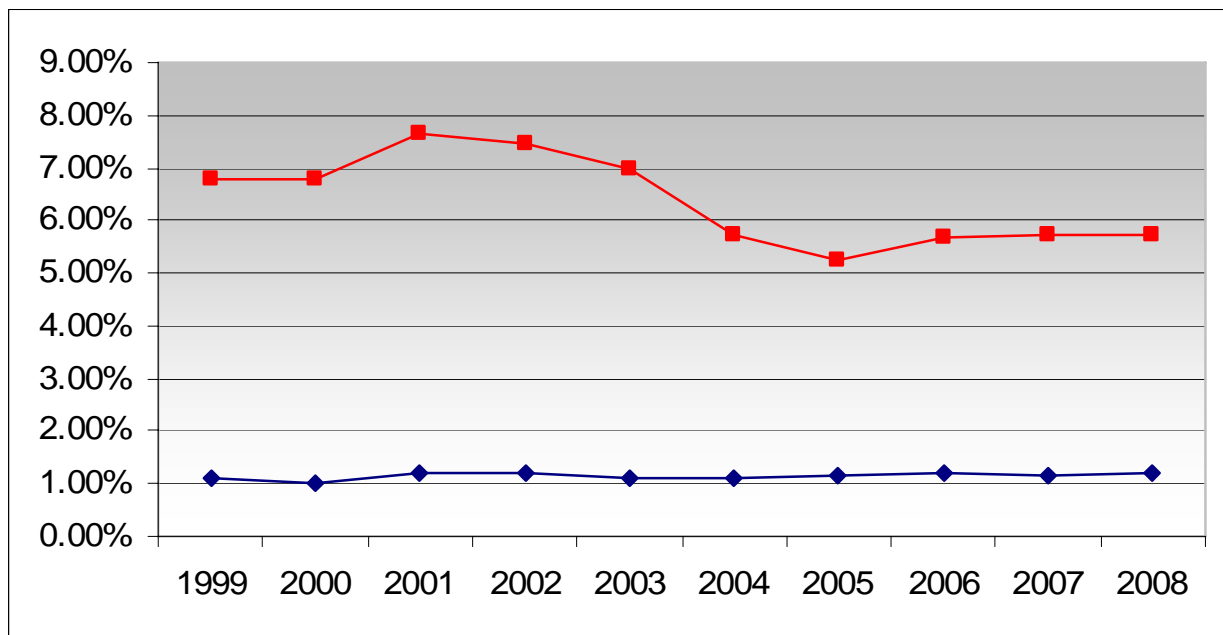
Source: TNS Media Intelligence, OAAA

Hotels & Resorts, Domestic

Below are the percentages of total outdoor advertising spending for the Hotels & Resorts, Domestic category for each year from 1999 through 2008.



The following graph compares the category's spending on outdoor compared to all media expenditures from 1999 through 2008.

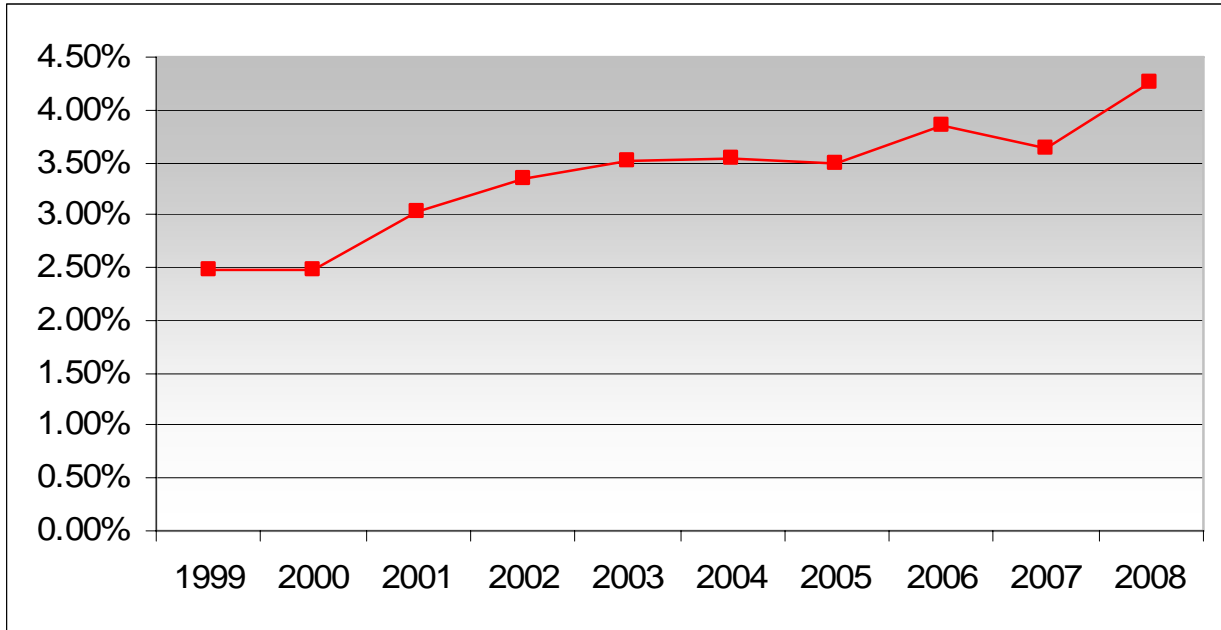


Source: TNS Media Intelligence, OAAA

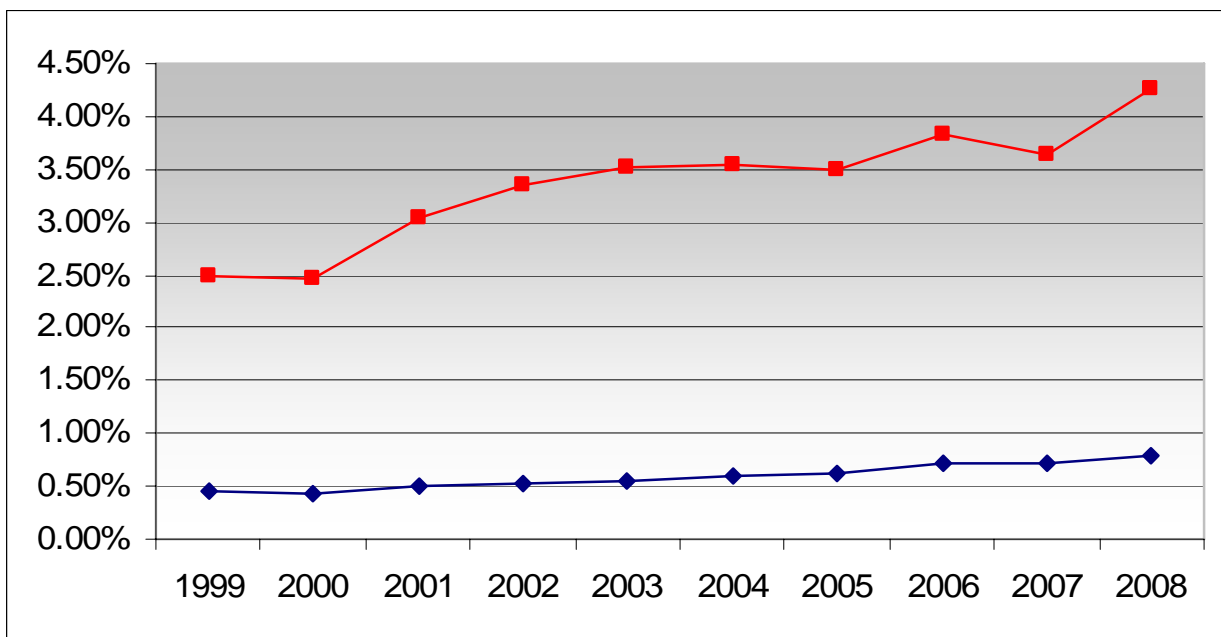
Outdoor All Media

Hospitals, Clinics & Medical Centers

Below are the percentages of total outdoor advertising spending for the Hospitals, Clinics & Medical Centers category for each year from 1999 through 2008.



The following graph compares the category's spending on outdoor compared to all media expenditures from 1999 through 2008.

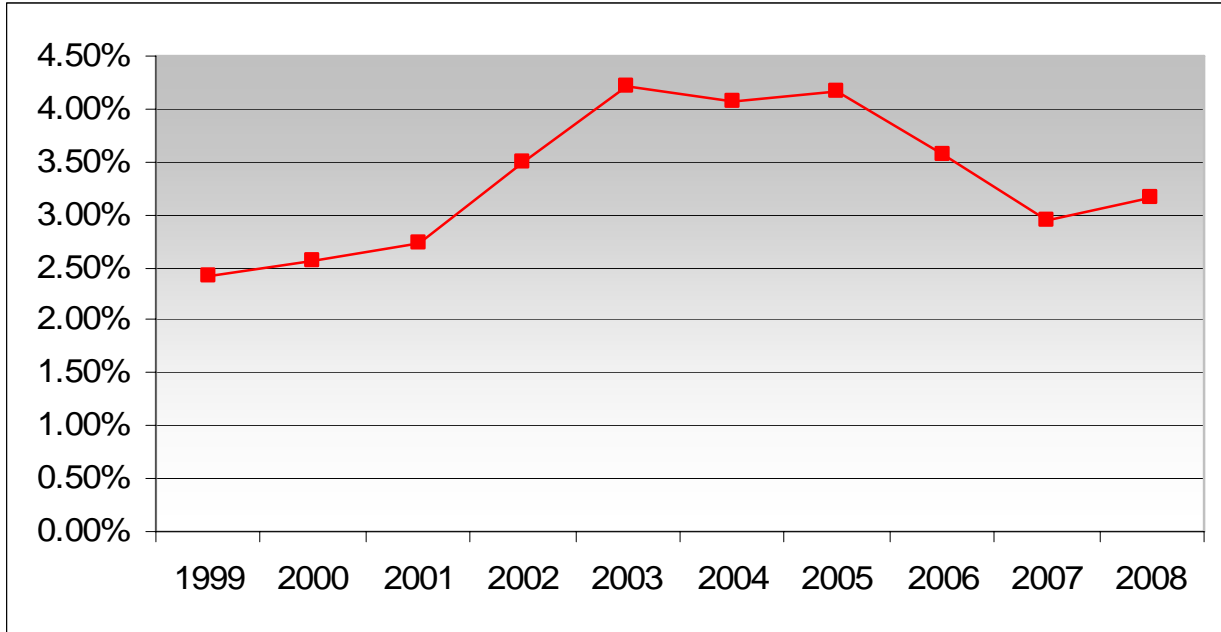


Source: TNS Media Intelligence, OAAA

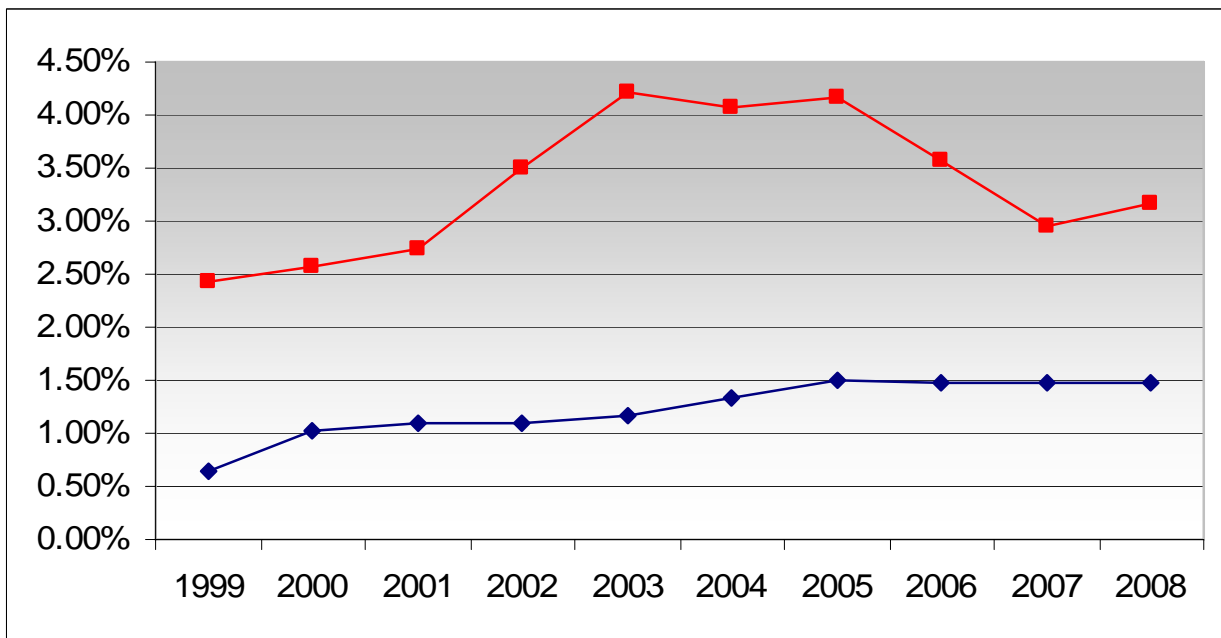
Outdoor All Media

Banking (Consumer)

Below are the percentages of total outdoor advertising spending for the Banking (Consumer) category for each year from 1999 through 2008.



The following graph compares the category's spending on outdoor compared to all media expenditures from 1999 through 2008.

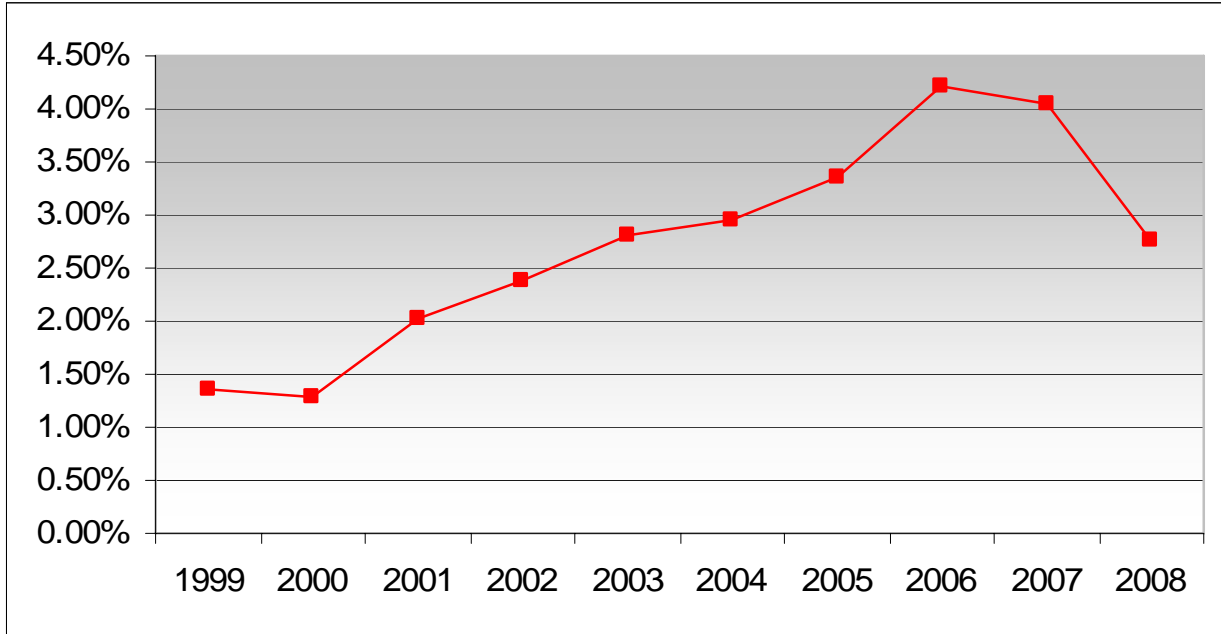


Source: TNS Media Intelligence, OAAA

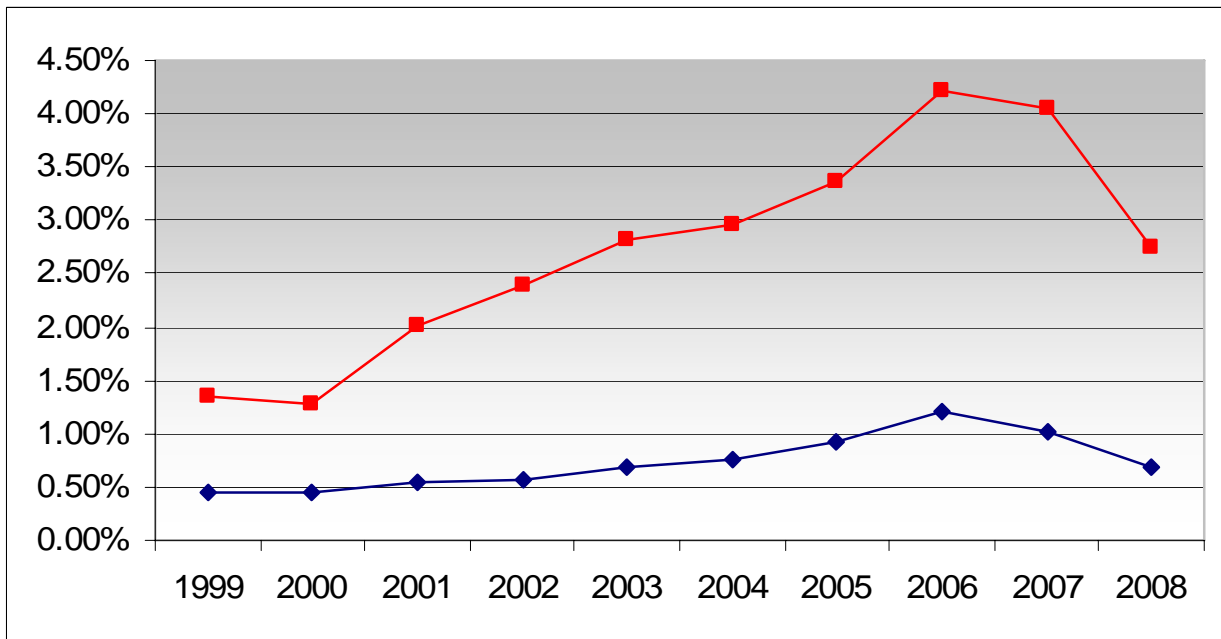
Outdoor All Media

Real Estate Developers & Developments

Below are the percentages of total outdoor advertising spending for the Real Estate Developers & Developments category for each year from 1999 through 2008.



The following graph compares the category's spending on outdoor compared to all media expenditures from 1999 through 2008.

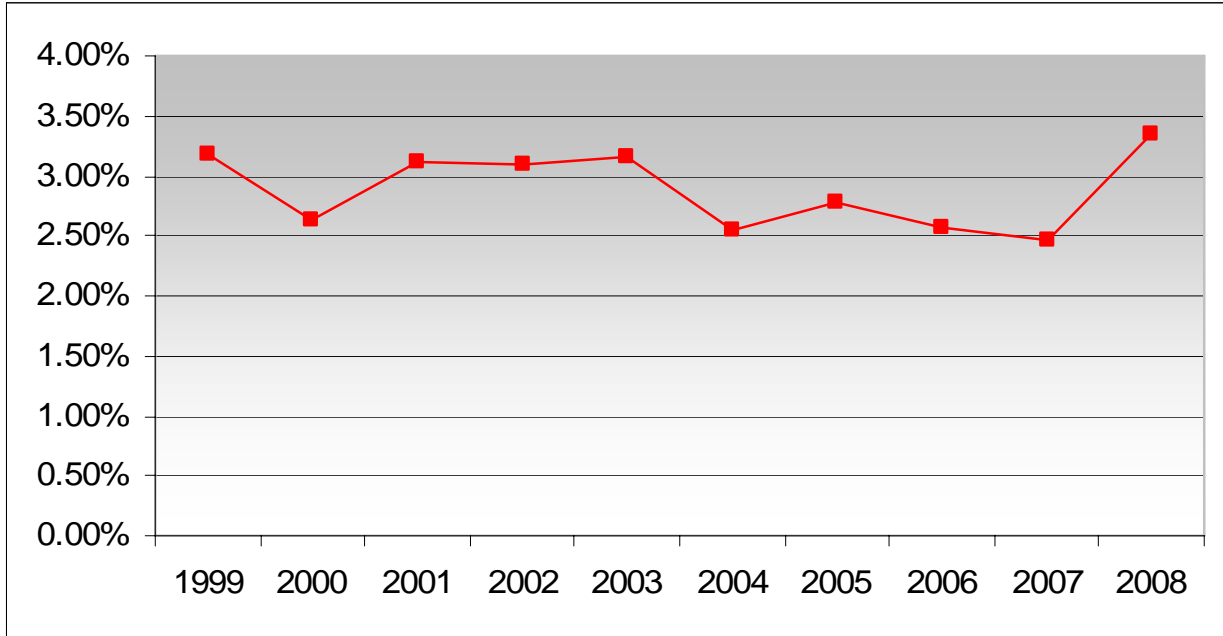


Source: TNS Media Intelligence, OAAA

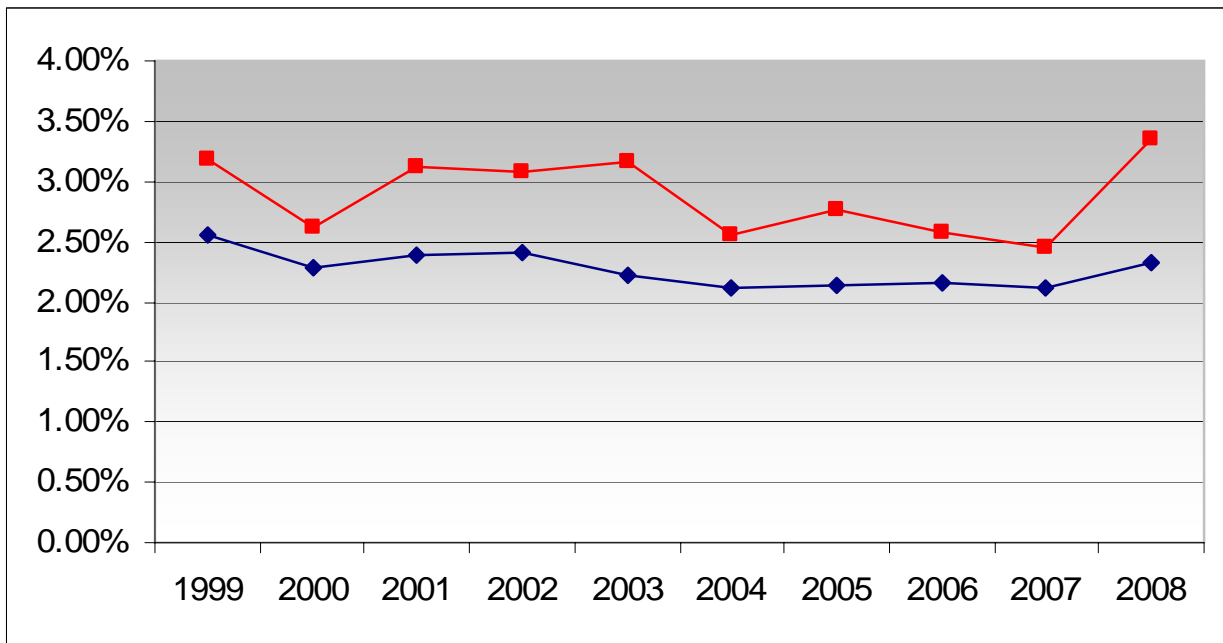
■ Outdoor ◆ All Media

Quick Serve Restaurants

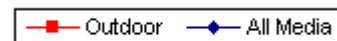
Below are the percentages of total outdoor advertising spending for the Quick Serve Restaurants category for each year from 1999 through 2008.



The following graph compares the category's spending on outdoor compared to all media expenditures from 1999 through 2008.

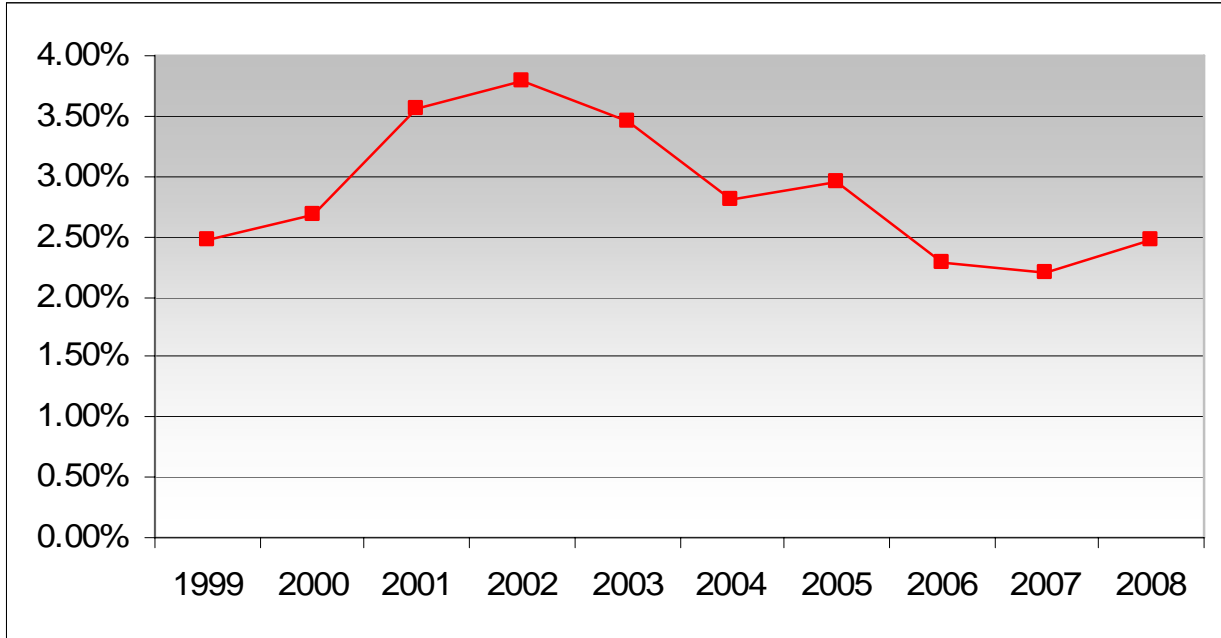


Source: TNS Media Intelligence, OAAA

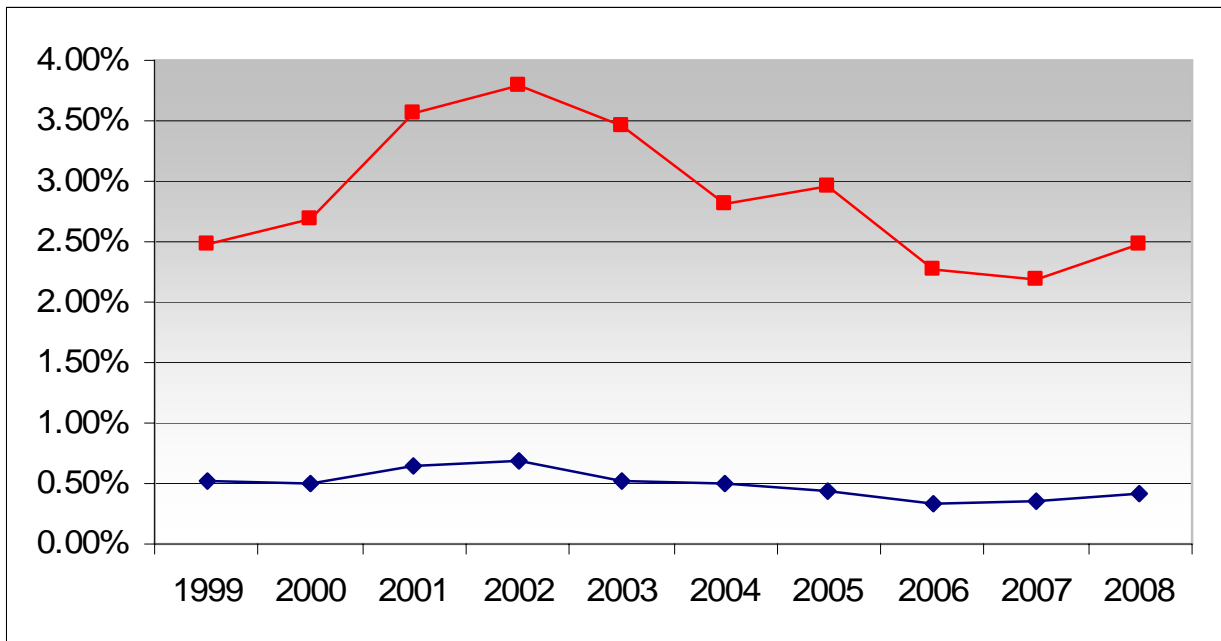


Regular Beer & Ale

Below are the percentages of total outdoor advertising spending for the Regular Beer & Ale category for each year from 1999 through 2008.



The following graph compares the category's spending on outdoor compared to all media expenditures from 1999 through 2008.

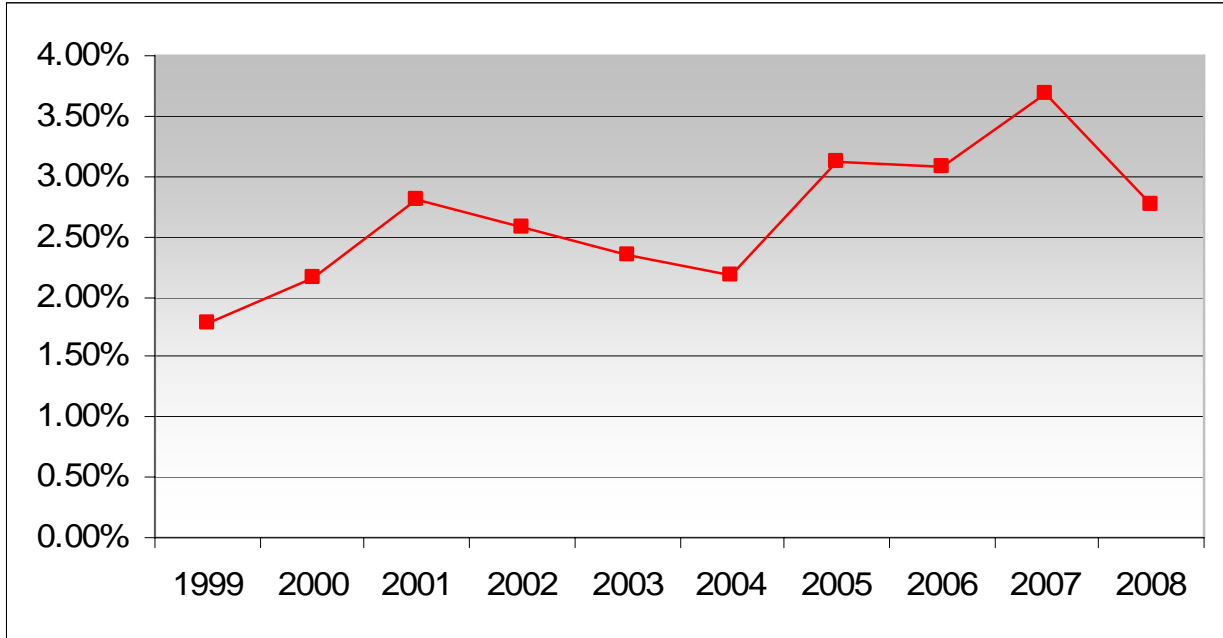


Source: TNS Media Intelligence, OAAA

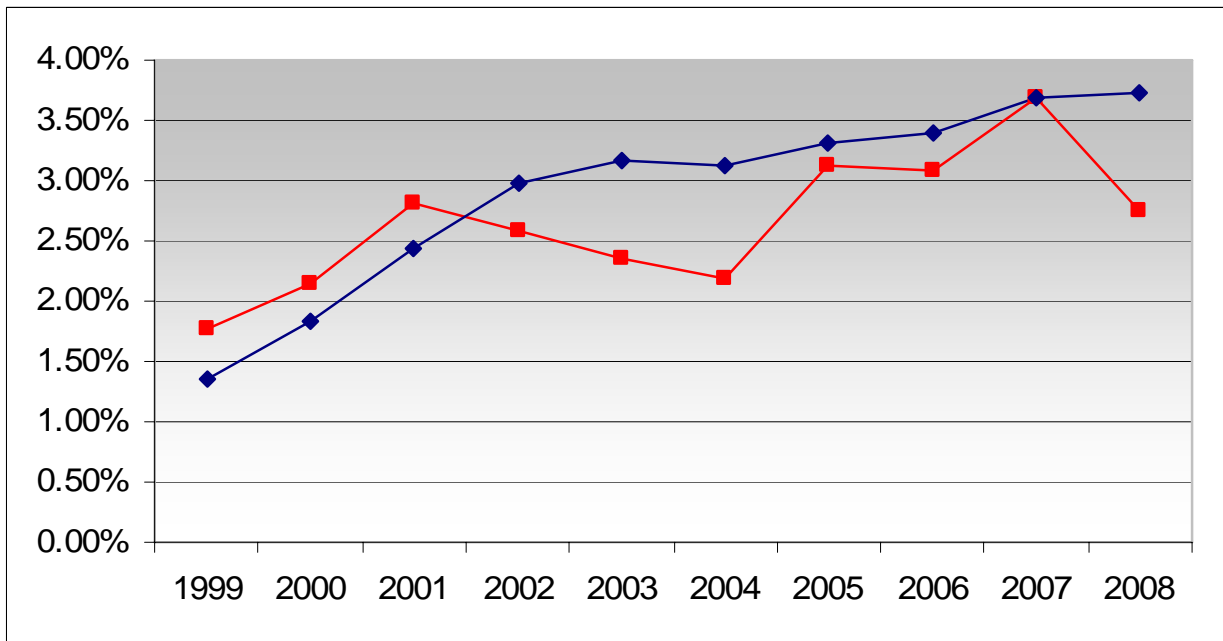
Outdoor All Media

Wireless Telecom Providers

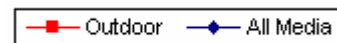
Below are the percentages of total outdoor advertising spending for the Wireless Telecom Providers category for each year from 1999 through 2008.



The following graph compares the category's spending on outdoor compared to all media expenditures from 1999 through 2008.

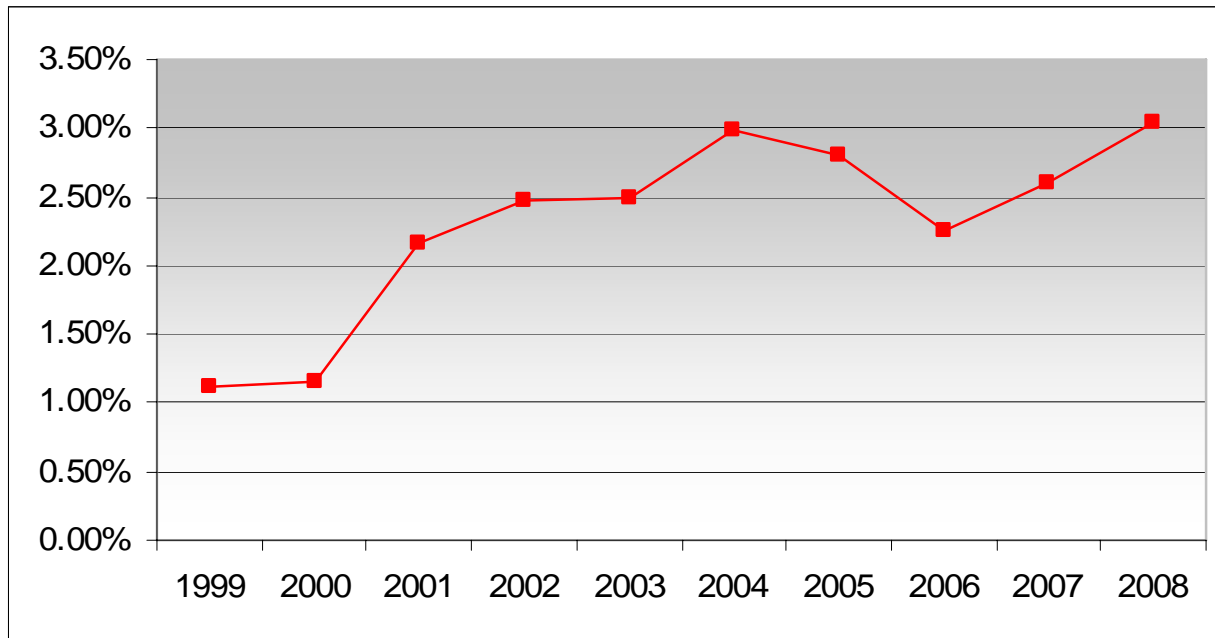


Source: TNS Media Intelligence, OAAA

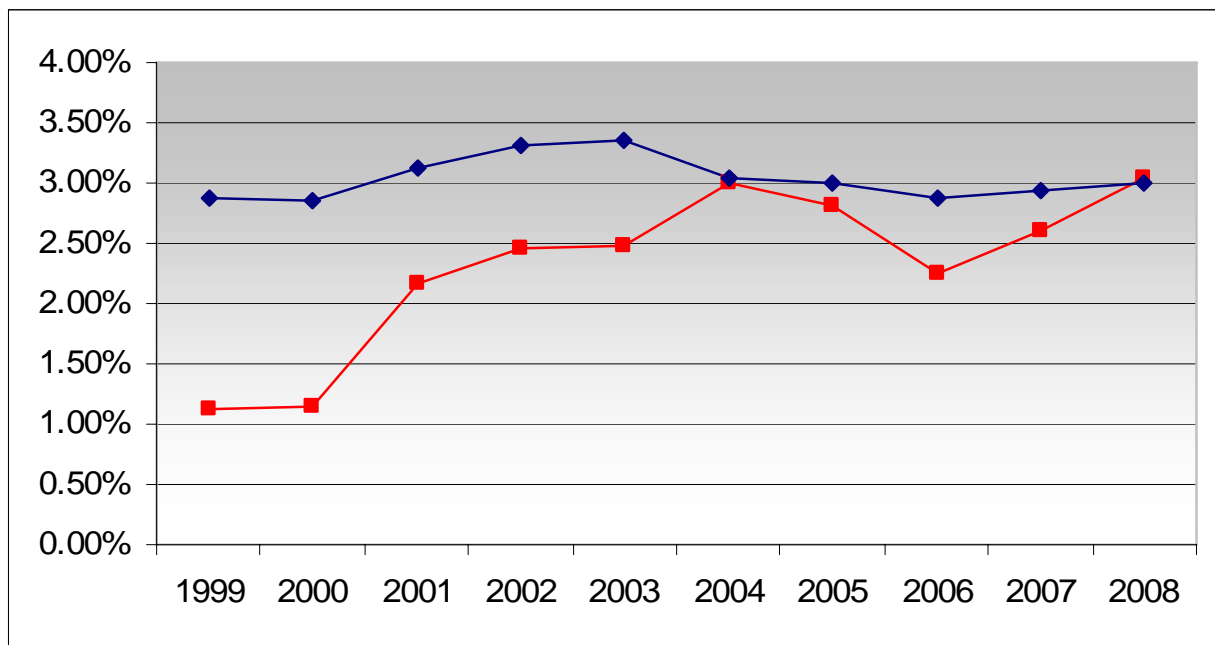


Motion Pictures

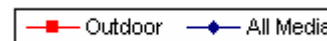
Below are the percentages of total outdoor advertising spending for the Motion Pictures category for each year from 1999 through 2008.



The following graph compares the category's spending on outdoor compared to all media expenditures from 1999 through 2008.

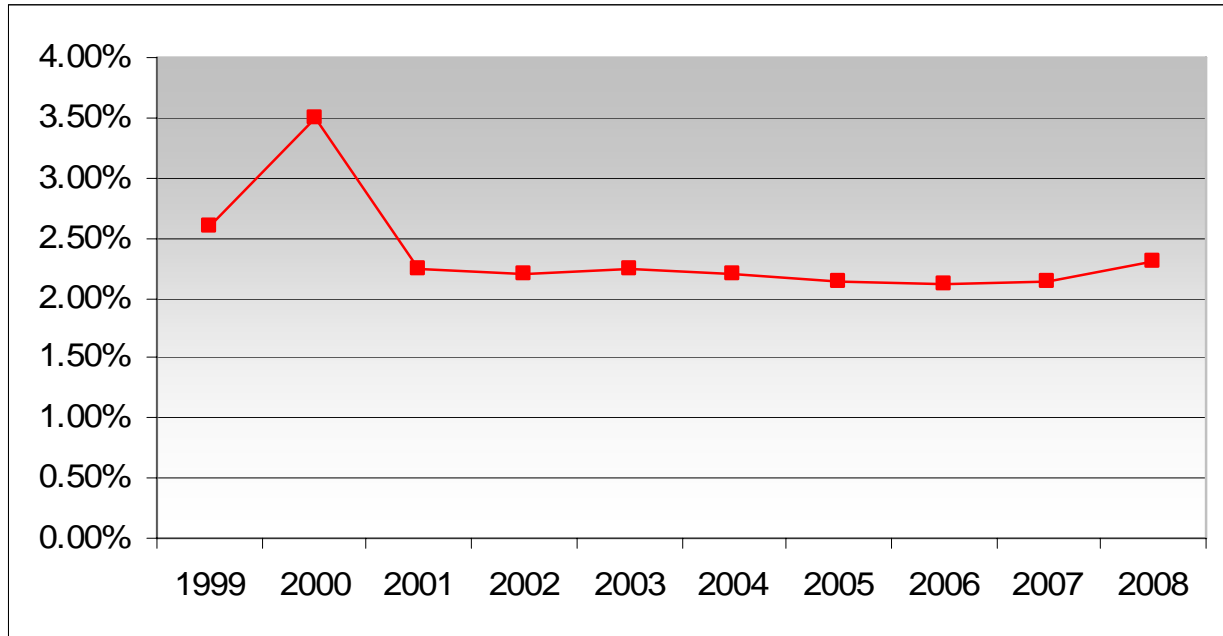


Source: TNS Media Intelligence, OAAA

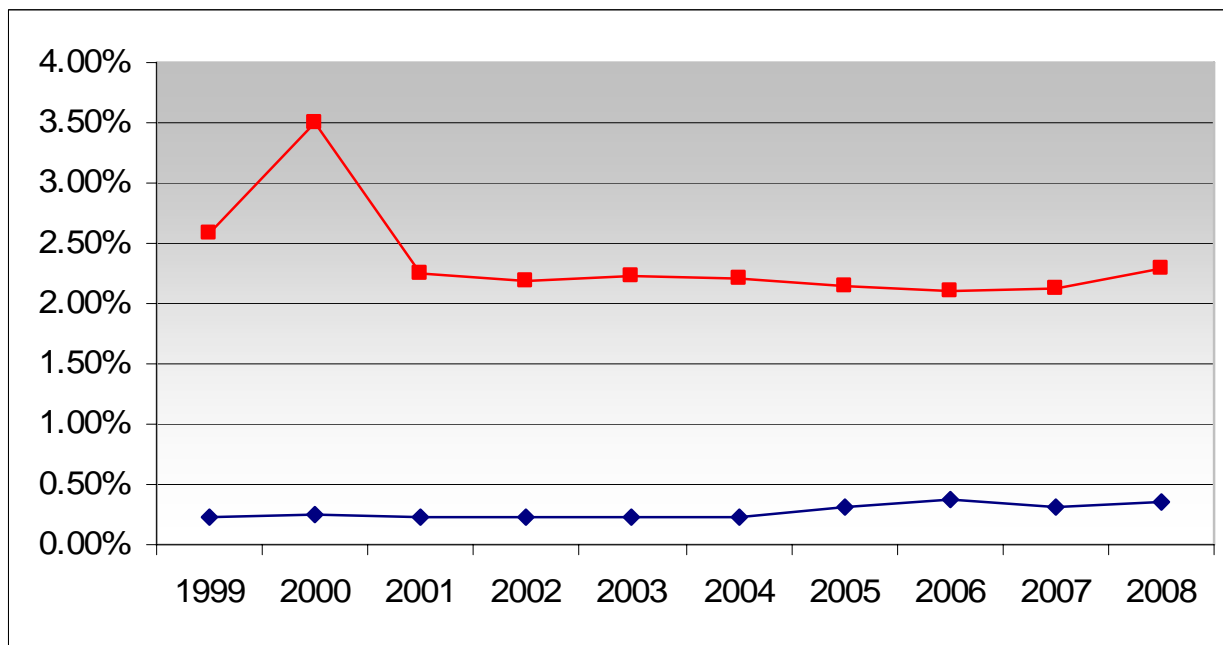


Amusements & Events: Comb Copy & NEC

Below are the percentages of total outdoor advertising spending for the Amusements & Events category for each year from 1999 through 2008.



The following graph compares the category's spending on outdoor compared to all media expenditures from 1999 through 2008.

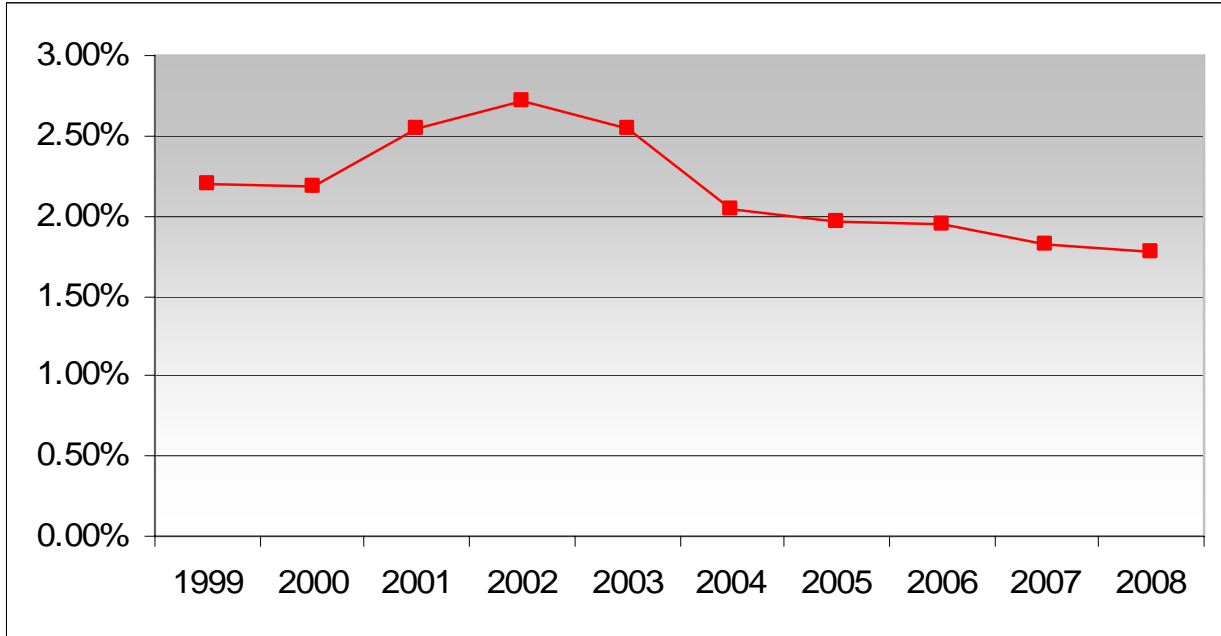


Source: TNS Media Intelligence, OAAA

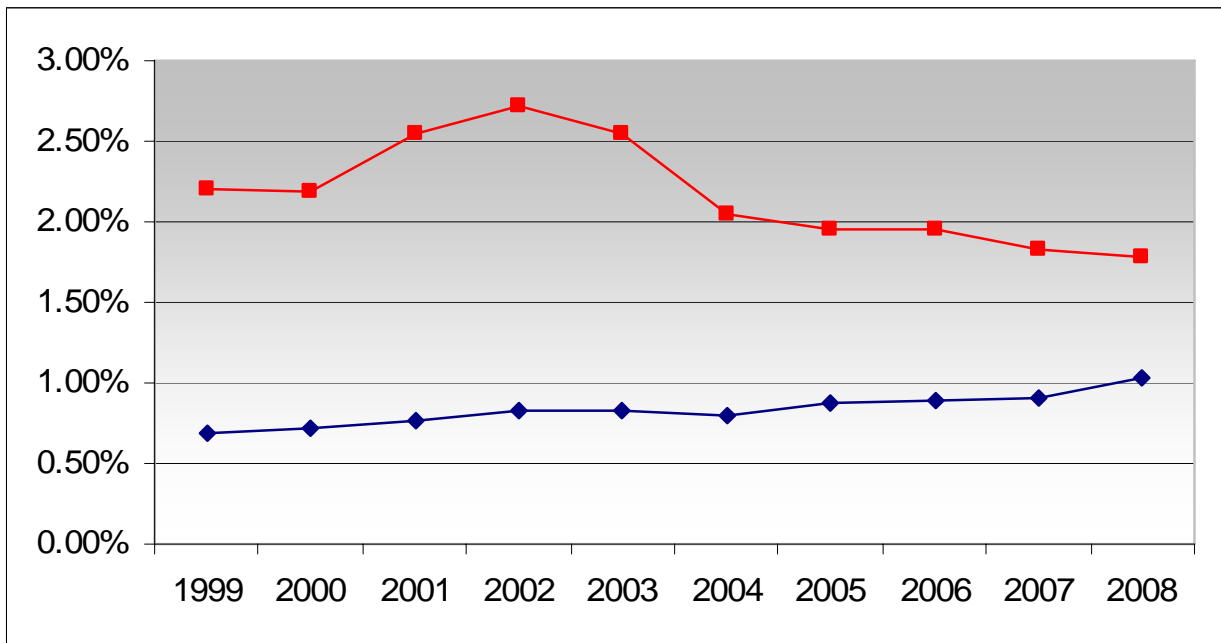
Outdoor All Media

Casual Dining Restaurants

Below are the percentages of total outdoor advertising spending for the Casual Dining Restaurants category for each year from 1999 through 2008.



The following graph compares the category's spending on outdoor compared to all media expenditures from 1999 through 2008.



Source: TNS Media Intelligence, OAAA

Outdoor All Media

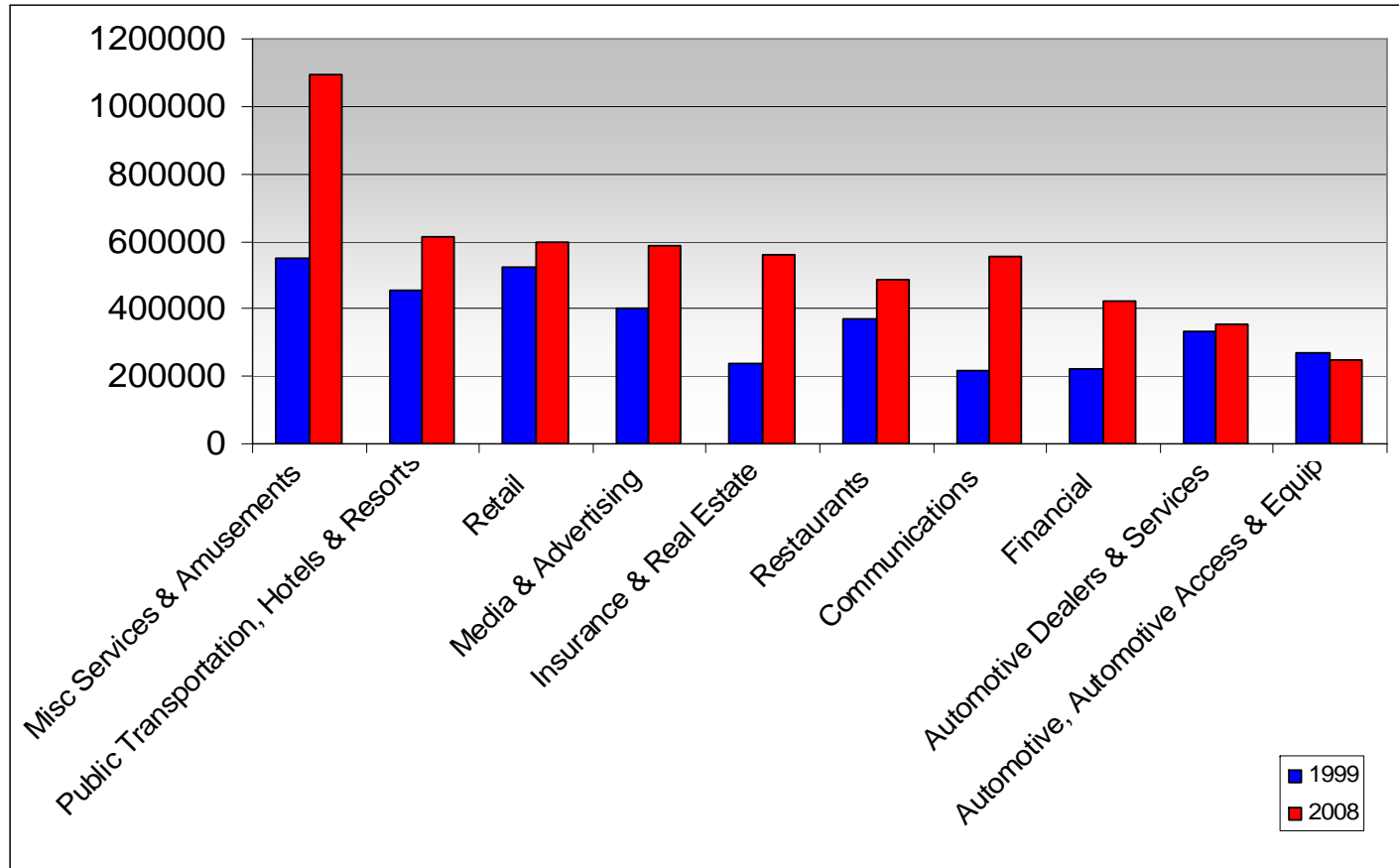
THEN & NOW

oaaa

OUTDOOR ADVERTISING
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Top Outdoor Industries

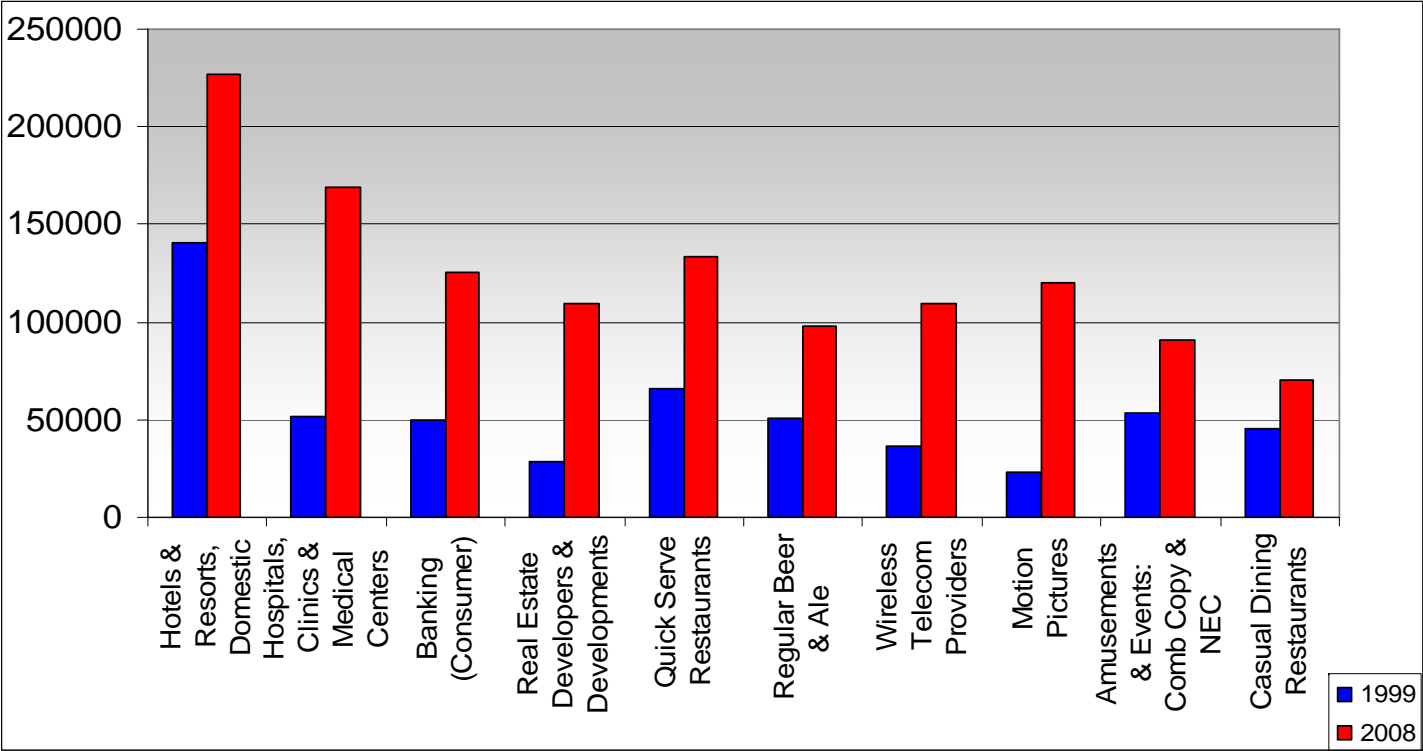
Spending on outdoor advertising has increased in almost all of the top ten industries over the last decade.



Source: TNS Media Intelligence, OAAA

Top Outdoor Categories

Spending on outdoor advertising has increased in every category over the last decade.



Source: TNS Media Intelligence, OAAA

Top 100 Outdoor Products of 1999 (Based on Revenue)

1	PHILIP MORRIS : VARIOUS CIGARETTES
2	MCDONALDS RESTAURANT : GENERAL PROMOTION - QSR
3	FORD FULL LINE : VARIOUS DOMESTIC AUTOS & TRUCKS
4	DODGE DEALER ASSN FULL LINE : DOMESTIC AUTO DEALER ASSN
5	BROWN & WILLIAMSON : VARIOUS CIGARETTES
6	MILLER : VARIOUS BEERS
7	CHEVROLET FULL LINE : VARIOUS DOMESTIC AUTOS & TRUCKS
8	ANHEUSER-BUSCH : VARIOUS BEERS
9	RJ REYNOLDS : VARIOUS CIGARETTES
10	CRACKER BARREL OLD COUNTRY RESTAURANT
11	NISSAN FULL LINE : VARIOUS ASIAN AUTOS & TRUCKS
12	BLOCKBUSTER VIDEO RNTLS
13	CALIFORNIA MILK ADVISOR BOARD : MILK
14	NEXTEL : WIRELESS SERVICE
15	SEAGRAMS : ALCOHOLIC BEVERAGES
16	BURGER KING RESTAURANT : GENERAL PROMOTION - QSR
17	FORD DEALER ASSN FULL LINE : DOMESTIC AUTO DEALER ASSN
18	AMERICAN DAIRY ASSN : MILK
19	HOLIDAY INNS
20	UNITED DISTILLERS : ALCOHOLIC BEVERAGES
21	DAYS INN HOTELS
22	WENDYS RESTAURANT : GENERAL PROMOTION - QSR
23	UNIVERSAL PICTURES : VARIOUS MOVIES
24	MOTEL 6 MOTELS
25	COMFORT INN HOTELS
26	HAMPTON INN HOTELS
27	AT&T LONG DISTANCE : BUSINESS & RESIDENTIAL
28	DODGE FULL LINE : VARIOUS DOMESTIC AUTOS & TRUCKS
29	APPLE : VARIOUS COMPUTERS
30	PEPSI-COLA CO : VARIOUS SOFT DRINKS
31	COCA-COLA : VARIOUS SOFT DRINKS
32	GAP CLOTHING STORE : MEN & WOMEN
33	VIRGIN ATLANTIC AIRWAYS : DOM & INTL
34	BEST WESTERN HOTELS
35	AT&T : WIRELESS SERVICE
36	SHONEYS RESTAURANT : CASUAL DINING RESTAURANT
37	WASHINGTON MUTUAL BANK : CONSUMER SERVICES
38	SOUTHWEST AIRLINES : DOM
39	WELLS FARGO BANK : NOTICE OF REDEMPTION
40	LORILLARD : VARIOUS CIGARETTES
41	BUDWEISER : BEER
42	RITE AID PHARMACY
43	BLUE CROSS & BLUE SHIELD : MEDICAL & DENTAL INSURANCE
44	RED ROOF INNS
45	TOYOTA FULL LINE : VARIOUS ASIAN AUTOS & TRUCKS
46	HOLIDAY INNS : EXPRESS
47	SUPER 8 MOTELS
48	OFFICE OF NATIONAL DRUG CONTROL : DRUG PREVENTION ORGANIZATION
49	GTE : WIRELESS SERVICE
50	VOLKSWAGEN FULL LINE : VARIOUS EUROPEAN AUTOS & TRUCKS

51 BUENA VISTA : VARIOUS MOVIES
52 CHEVRON SERVICE STATION
53 UPN TV NETWORK
54 PONTIAC FULL LINE : VARIOUS DOMESTIC AUTOS & TRUCKS
55 HARDEES RESTAURANT : GENERAL PROMOTION - QSR
56 RE/MAX REALTY : REAL ESTATE AGENTS
57 DENNYS RESTAURANT : CASUAL DINING RESTAURANT
58 ARBYS RESTAURANT : GENERAL PROMOTION - QSR
59 BELLSOUTH MOBILITY : WIRELESS SERVICE
60 AMERICAN EXPRESS : PERSONAL CREDIT CARD
61 KELLOGGS : VARIOUS FOOD PRODUCTS
62 GEORGIA STATE LOTTERY
63 SATURN AUTOS : VARIOUS DOMESTIC AUTOS
64 PROCTER & GAMBLE : MISC MERCHANDISE
65 BARTON : VARIOUS BEERS
66 WARNER BROS PICTURES : VARIOUS MOVIES
67 AMTRAK : RAILROAD
68 DITECH.COM : CONSUMER SERVICES
69 OLD NAVY CLOTHING STORE : MEN & WOMEN
70 CALIFORNIA STATE LOTTERY
71 CHRYSLER FULL LINE : VARIOUS DOMESTIC AUTOS & TRUCKS
72 FX CABLE TV
73 KOOL : VAR MENTHOL CIGARETTES
74 LA QUINTA INNS
75 RAMADA HOTELS
76 PARAMOUNT PICTURES : VARIOUS MOVIES
77 SONY PICTURES : VARIOUS MOVIES
78 TACO BELL RESTAURANT : GENERAL PROMOTION - QSR
79 COMPUTERJOBS.COM : ONLINE
80 DISCOUNT TIRE CO INC
81 PACIFIC BELL : YELLOW PAGES
82 MITSUBISHI FULL LINE : VARIOUS ASIAN AUTOS & TRUCKS
83 GAP : RTW MEN & WOMEN
84 CHRYSLER PLYMOUTH FULL LINE : VARIOUS DOMESTIC AUTOS & TRUCKS
85 ALLTEL : WIRELESS SERVICE
86 TELEBANK : CONSUMER SERVICES
87 HARRAHS CASINO HOTELS
88 DELOITTE TOUCHE : CONSUMER SERVICES
89 JEEP VEHICLES : VARIOUS DOMESTIC TRUCKS
90 SPRINT PCS WIRELESS SERVICE : WIRELESS SERVICE
91 KROGER FOOD STORES : FOOD STORE (CHAIN)
92 FIDELITY INVESTMENTS : CONSUMER SERVICES
93 MERCURY INSURANCE : VARIOUS INSURANCE
94 ORKIN EXTERMINATORS
95 BROWN FORMAN : ALCOHOLIC BEVERAGES
96 E TRADE FINANCIAL : ONLINE
97 LOWES BUILDING SUPPLY STORE
98 INFINITI FULL LINE : VARIOUS ASIAN AUTOS & TRUCKS
99 ABC TV NETWORK
100 COCA-COLA BOTTLERS : VARIOUS SOFT DRINKS

Top 100 Outdoor Products of 2008 (Based on Revenue)

1	MCDONALDS RESTAURANT
2	VERIZON LONG DISTANCE
3	AT&T WIRELESS SERVICE
4	AT&T LONG DISTANCE
5	STATE FARM VAR INSURANCE
6	VERIZON WIRELESS SERVICE
7	GEICO VAR INSURANCE
8	ANHEUSER-BUSCH VAR BEERS
9	COCA-COLA VAR SOFT DRINKS
10	WARNER BROS VAR MOVIES
11	CHARLES SCHWAB CONSUMER SERVICES
12	COORS: VAR BEERS
13	CRACKER BARREL OLD CNTRY
14	COMCAST CABLE
15	SPRINT NEXTEL WIRELESS SERVICE
16	PARAMOUNT VAR MOVIES
17	APPLE VAR COMPUTERS
18	SPRINT LONG DISTANCE BUSINESS & RES
19	UNIVERSAL VAR MOVIES
20	WALT DISNEY VAR MOVIES
21	BMW AUTO & TRK VAR
22	CHEVRON SERVICE STATION
23	HSBC BANK CONSUMER SERVICES
24	WACHOVIA BANK CONSUMER SERVICES
25	HEINEKEN VAR BEERS
26	MILLER VAR BEERS
27	METRO PCS WIRELESS SERVICE
28	DIAGEO PLC VAR BEVERAGES
29	SONY VAR MOVIES
30	20TH CENTURY FOX VAR MOVIES
31	US CELLULAR WIRELESS SERVICE
32	BOOST WIRELESS SERVICE
33	GENERAL MOTORS CORP VAR AUTO&TRK
34	BANK OF AMERICA
35	FORD AUTO&TRK VAR
36	TOYOTA FULL LINE VAR AUTO&TRK
37	MICROSOFT VAR SOFTWARE
38	ACCENTURE CONSULTING SVC
39	TARGET
40	TIME WARNER CABLE
41	WASHINGTON MUTUAL BANK
42	APPLE COMPUTER STORE
43	GAP CLOTHING STORE MEN & WOMEN
44	BURGER KING RESTAURANT
45	CHASE BANK VAR CREDIT CARDS
46	HARRAHS CASINO HOTELS
47	WALT DISNEY THEME PARKS
48	COORS LIGHT BEER
49	HOLIDAY INNS EXPRESS
50	CHEVROLET AUTO&TRK VAR
51	TOYOTA DLR ASSN VAR AUTO&TRK

52 HONDA AUTO & TRUCK
53 RE/MAX REALTY
54 APPLE Ipod
55 ALLSTATE INSURANCE
56 HAMPTON INN HOTELS
57 KROGER FOOD STORES
58 NISSAN AUTO&TRK VAR
59 INFINITI AUTO&TRK VAR
60 HBO CABLE TV
61 BEST WESTERN HOTELS
62 DODGE FULL LINE AUTO&TRK
63 PULTE HOMES CORP BLDRS
64 SOUTHWEST AIRLINES
65 JP MORGAN CHASE & CO CONSUMER SVC
66 BANANA REPUBLIC STORE MEN & WOMEN
67 HSBC BANK MULTI CREDIT CARDS
68 SCION AUTOS VAR
69 LEXUS AUTO&TRK VAR
70 NATIONAL CITY BANK CONSUMER SERVICES
71 TEXAS STATE LOTTERY
72 SUBWAY RESTAURANT
73 NEW YORK STATE LOTTERY
74 FLORIDA STATE LOTTERY
75 SPRINT WIRELESS SERVICE
76 PATRON SPIRITS
77 NBC: PAID PROMO
78 ORACLE: VAR SOFTWARE
79 BUD LIGHT BEER
80 WENDYS RESTAURANT
81 WELLS FARGO BANK CONSUMER SERVICES
82 AMERICAN EXPRESS
83 DELTA AIR LINES
84 HOLIDAY INNS
85 SAMSUNG: WIRELESS PHONES
86 CW TV NETWORK
87 KB HOME BUILDER
88 LIONS GATE VAR MOVIES
89 CHICK-FIL-A
90 CHIPOTLE MEXICAN GRILL
91 BLUE CROSS&BLUE SHIELD MEDICAL&DENTAL INS
92 COMFORT INN HOTELS
93 SERINO COYNE AD AGENCY
94 DAYS INN HOTELS
95 LENNAR HOMES
96 CALIFORNIA STATE LOTTERY
97 ABC TV NETWORK
98 BARRACUDA NETWORKS VAR COMPUTERS
99 MERCEDES BENZ AUTO&TRUCK
100 NBC UNIVERSAL