

Industry Perspective. Growth
and Looking Towards 2022 ↘

QUESTIONS & ANSWERS

ALLVISION

astral

OUTFRONT/

PATTISON
OUTDOOR ADVERTISING

QUEBECOR
EXPERTISE | MEDIA

a sales perspective

1

How do you **balance demand** for your static product against the Buzzy DOOH?

In a nutshell, we try to incorporate the same or similar tools when making a recommendation and or delivering a proposal. We want to use data to lead us to our conclusions.

Ideally, we need some general info about the role for OOH and any insight from the agency on the target. From there, we want to dive a bit deeper into the target, create audience and behaviour profiles, and build out custom audiences that are on target to our success. We use Environics to define the total opportunity and plot the consumers on a map. We then lay in our product and make recommendations on how to best reach this market. Typically, there is a mix of product and we provide the most efficient way in delivering the audience via all OOH formats. If digital is shown with static, we then communicate how both can work together to support the overall campaign.

Sandy D'Amico, National Sales Director, **PATTISON Outdoor**



DOOH is only a very small portion of the OOH landscape in the majority of markets. Once we understand the objectives of the campaign we can put together a recommendation. In the case of having a very targeted audience, we use similar (if not better) audience insights data that are being used in the programmatic space to show how the target audience can be reached most effectively and efficiently using all products in a market. For campaigns that are geared towards mass market awareness and less targeted, it is important to show the efficiency of OOH through reach and frequency, CPMs, use of impact and proving past success using our library of campaign awareness scores.

Rick Borthwick, National Sales Director, **PATTISON Outdoor**

My experience has been mostly with QSR and the demand for static is as great or even greater than digital, all based on location of franchise. No question that timing and flexibility along with production cost favour digital placement. In the end education and need for static are at the education level.

Frank Chimienti, National Sales Director, **PATTISON Outdoor**



2

What **trends are you seeing in the RFPs** coming from agencies? Are you still seeing a high demand for local/regional and neighbourhood placements which took priority during peak COVID or have you seen an influx of national brands/campaigns returning as consumers are out and about?

RFP's have been waning. The quality in the ask is not at the level it used to be pre pandemic. This is a big challenge to the industry. Without the ability to focus on a challenge, we become a simple cost exercise and subject to their perceptions. The focus as a result is still neighborhoods, with a sprinkle of Commute and or Downtown presence. We are increasing our GRP proposals but the strategy hasn't altered too much from 3 or even 6 months ago.

Sandy D'Amico, National Sales Director, **PATTISON Outdoor**

a big challenge
to the industry

I agree with Sandy, the RFP has not been very detailed (but then again prior to the pandemic they weren't either). It is up to the sales teams to dig into client requests to understand the campaign objectives. In the past couple months we are seeing National advertisers allocating a higher budget towards their OOH campaigns. There is some caution when looking at different environments based on decreased audiences, even with CPMs adjusted to reflect the audience change. Regional/local placements vs. National brands returning is tough to measure. Local/regional buys tend to come from our retail clients and the sales cycles are very different. These clients have always bought local/regional and will continue to do so. National business and activity has increased recently.

Rick Borthwick, National Sales Director, **PATTISON Outdoor**

national business and activity **has** **increased recently**

Agree with the comments above and more and more last-minute requests and without RFPs or at least a proper one, all depends on client. Agree again with increased activity in recent weeks, especially from USA as well as airport!

Frank Chimienti, National Sales Director, **PATTISON Outdoor**

It's a combination of the two. As mentioned above, the neighbourhood requests will not disappear as telework is here to stay, they will refine. Since Ontario deconfined in July, requests for national brand campaigns are slowly coming back. Business in Quebec however was more reactive as early as Spring.

Patricia Heckmann, General Manager Agency & Client Solutions, **QUEBECOR**

telework is here to stay

The national business is definitely on the increase and we are thankful for it. But at the same time, we had key national clients that were active throughout the pandemic so I would not describe the peak COVID priority in that way. Consumers were "out and about" throughout the pandemic. True at some points, there were fewer but when you add up everyone who was frontline or people getting out to buy groceries etc... there were still a lot of eyeballs on the streets. Certain categories were hit hard due to closures; the loss of travel/entertainment/event revenue was understandable and we are glad on all kinds of levels that these businesses are reopening again but we saw other categories pick up: DTC in particular. But, yes, it was a bit bouncy. Local was strong at one point and then the 2nd wave hit, then the 3rd wave and now in some places a 4th wave but we got through it. People still needed to get outside and now the joy we all feel to be out is amazing.

George Jakji, Sr. VP Sales, **OUTFRONT**



Overall, RFP's are starting to pick up to pre-Covid rates and in terms of demand, we're seeing a blend of requests coming through from both the local/regional level and neighbourhood placements. It all comes down to the advertiser category; for example, some national brands will RFP multi-market opportunities, whereas some QSR brands will look into smaller markets.

As we emerge from this pandemic, there's also definitely demand for more conscious traffic trends as brands are relying more on OOH vendors to provide supporting mobile data to validate that we are bouncing back. We are also getting requests to provide pre-pandemic and pandemic circulation estimates on their target. Both the COMMB Insights Report and the ability to leverage our own Bell First Party Data, have been helpful tools to provide clients.

Sales Teams, **BELL MEDIA/ASTRAL**





From inception, Allvision strategically developed two networks to satisfy local, regional and national needs. By doing so, we were well-positioned to fulfill all advertisers' needs. With that said, the request from agencies has not differed; but what we have seen is a significant uptick in demand.

With traffic levels in Toronto hovering above normal, advertisers are actualizing the power of our highway network. The 400 series highway boards deliver broadcast reach levels, boasting the strongest daily impressions on any highway in Canada. Coupled with the most extensive geographic coverage on the 400 series highways from Oshawa in the east to Mississauga in the west, we are enjoying a significant uptick in demand from national advertisers.

Paul Gittens, VP Sales, **ALLVISION**

a significant
uptick in demand

3

Is the sales rep/client relationship as important today as it was pre-pandemic or perhaps more important? How has this changed, if at all?

The Sales Rep role is crucial and the skill set is changing. We are moving from space and product negotiation to more of a strategic partner. Speed and service are crucial to getting on plan but Reps will need to understand how OOH fits into a client's full media plan if we want influence more spend. They will need to understand audience segmenting, the nuances of the PRG platforms, what is important to agencies when making those decisions, and finding a way to connect it all, before making recommendations.

Sandy D'Amico, National Sales Director, **PATTISON Outdoor**

speed and service
are crucial

I echo Sandy's comments but also the role is changing to an educational position. Many clients buying OOH are not that familiar with the OOH space. They tend to jump on the "buzz" words of the day. Our sales teams need to be able to educate clients on the OOH space; how to use OOH effectively and efficiently, the strategy for pDOOH, how to build audiences/target campaigns in OOH (digital and static), how OOH plays a role in the full media campaign, how OOH works well with TV, Online, Social, Radio, etc. The common thread that has not changed is customer service, relationships and being a trusted advisor/consultant are key to exceling in a sales role.

Rick Borthwick, National Sales Director, **PATTISON Outdoor**



Education and influencing are our new roles and determining from agency to agency or client to client when those moments are before it comes to us or even an agency/agree buzz words Rick are the easy out for most. Sandy has great point as the roles are changing. Having said that and I am sure more to discuss, the lack of understanding of ooh is a real concern especially when you drill down to unique products or environments within our product line ups.

I believe we need to move forward with a high level of education to change the current state of where we are!

A couple of things we know for certain:

1
**agencies
continue to
have a high level
of turnover**

nothing we can do about that

2
**OOH is not
their priority
from a training
standpoint**

definitely something we can do about that

I may be wrong and I am working with a small sample size and definitely up for debate, it feels like much of what we work on in many cases from placement and budget have already been pre-determined!

Frank Chimienti, National Sales Director, **PATTISON Outdoor**

Firstly, a sales rep/client relationship has always been a priority. However, the uncertainty of the business, fluctuation of traffic that varies by location has most certainly brought on a need for even closer relationships and good communication, relying on our OOH representatives' expertise input more than ever. Being unable to conduct market tours, for example, has forced us to develop new tools to help our clients understand the ecosystem, see [here](#).

Patricia Heckmann, General Manager Agency & Client Solutions, **QUEBECOR**

rep/client relationships have always been a priority

Every time an aspect of the sales relationship automates, the role of the Sales Rep is re-examined and yes – it has to evolve. What we like about what's happening now with automation and programmatic is that the sales role is truly becoming an Account Manager role: less transactional and more about being aware of the client needs and fulfilling those. You cannot remove the human element from the relationship. The relationship is the key distinguisher between my “sticks in the ground” and someone else's “sticks in the ground”. I think the pandemic really showcased that. Internally, it is clear that the reps who maintained contact with their clients and put the relationship first are coming out of this strongest. This is a people business.

George Jakji, Sr. VP Sales, **OUTFRONT**

The rep/client relationship will always be a top priority. COVID may have prevented us from having more face-to-face interactions, but we are still having meaningful conversations through video and phone calls. It may not be the same as face-to-face interactions, but it has provided a much more convenient and frequent way to connect with clients. We will continue to adapt to ensure the online meetings are as informative as in-person meetings, especially as clients rely on us to provide more information, research on trends and COVID traffic updates. Ultimately, the ability to collaborate with clients, so we can deliver advertising solutions, is the end goal.

Sales Teams, **BELL MEDIA/ASTRAL**



I would have to say throughout the pandemic, and even the state we are now in, it is acutely evident that the sales executive and client relationship is more important than ever before. When the opportunity for in-person meetings, whether one-on-one, group, or agency presentations, lunches, or any other social events, was halted, it significantly impacted maintaining and, more importantly, developing relationships. The emphasis on the education of our products, programmatic digital-of-home consultation, and team collaboration has been our winning success with our clients.

Paul Gittens, VP Sales, **ALLVISION**

How are you balancing the buzz-worthy need for DOOH/pDOOH with traditional OOH in your sales strategies?

We are having discussions with our clients to make sure that when they request DOOH/pDOOH that it really aligns with their KPI's. Many clients have not been fully trained on these options and rely on us to guide them.

Patricia Heckmann, General Manager Agency & Client Solutions, **QUEBECOR**

Ultimately, it should all go back to the best solution for the client's needs. If we start with "what does success look like for you?" and then craft the right mix of assets/products to meet that goal – that is the key. DOOH and pDOOH are great options but they are not the best solution for every client. We have to start with solutioning for the client's needs and then everything else falls into place.

George Jakji, Sr. VP Sales, **OUTFRONT**

the best solution
for the client's
needs

We know DOOH/pDOOH is great for flexibility and dynamic possibilities, but traditional OOH will always serve a purpose. It offers 100% share of voice on a board and enables access to certain markets that may not be available with DOOH. Overall, a strategic combination of both traditional and digital OOH is the recipe for success in any OOH campaign.

Sales Teams, **BELL MEDIA/ASTRAL**

traditional and digital OOH is the **recipe for success in any OOH campaign**

As pDOOH utilization continues and the industry's penchant for automation remains, we at Allvision have steadfast in the flexibility of working with agencies to remove barriers and deliver ease. Our approach has always been to stay top-of-mind in the planning process to provide the best options to our clients.

Paul Gittens, VP Sales, **ALLVISION**

a President/CEO perspective

5 How are you incorporating the growth of new digital assets while maintaining/balancing a focus on traditional OOH? Is there a natural cannibalization of assets that occurs?

We are 100% focused on growing our digital platforms (both exterior & interior) but remain diligent in our effort to maintain our more traditional advertising platforms – especially in many of the rural markets we currently operate in. We believe traditional forms of advertising will still have its place in OOH, albeit far different then what it once was prior to the rise of digital in the OOH medium.

Steve McGregor, President, **PATTISON Outdoor**

focused on
growing **our**
digital platforms

Choosing locations to convert to digital is unavoidable, cannibalization being a bit drastic. We need to keep in mind that when converting a bus shelter to a digital asset, one face does remain static, thus reducing the impact on static. Conversion is positive as CPM's are higher & with the digital loop more inventory is available, and of course more flexibility is offered to advertisers. At Quebecor, our static inventory is still vast and offers efficiency for the market, thus not impacting our traditional OOH offer.

Claude Foisy, Vice President, **QUEBECOR**



conversion
is positive

evolving our products to meet the needs of our clients

I see digital as providing a new strategic option that appeals to some existing advertisers as well as new advertisers. So rather than cannibalization, I see it as evolving our products to meet the needs of our clients with new capabilities. In this case, flexibility is the primary benefit. Advertisers needing creative flexibility for pricing, dayparting, in some cases motion/video – now have that option in OOH; which is exciting. And, rather than cannibalizing; I believe we have addressed a sticking point that may have held us back before. However, for those advertisers who do not need that kind of flexibility – static provides the benefit of 100% share of voice – a compelling benefit in its own right. For many, the best solution is a combination. But ultimately, it comes down to a strategic decision.

Michele Erskin, CEO, **OUTFRONT**

Traditional OOH still represents the majority of faces in market, but we do see digital assets as a great opportunity for us to grow our business and to deliver greater value for our clients. The spaces available for outdoor OOH are currently stable, but with integration of new digital assets, it allows us to focus on the conversion of static boards to digital boards.

Ultimately, advertisers still see traditional OOH as an integral part of their marketing campaigns. Our objective is to ensure we are able to offer our customers products within our ecosystems across all of our regions.

Farshad Kajouii, Vice President – Pricing, Operations & OOH, **BELL MEDIA/ASTRAL**



As a pure-play digital OOH company, we are solely focused on the growth of our digital assets. With one OOH product line to focus on, we have to look at sales and revenue generation not by simply marketing impressions but by creating packaging and opportunities that really help brands engage with high value audiences. We do this by focusing on landmark OOH opportunities, market takeovers, network packages and more using our creativity in everything that we do.

Jennifer Bidwell, Executive Vice President, Sales, **ALLVISION**

6 Data is a rapidly evolving arm of the OOH industry, heavily relied upon for a variety of uses. As we move into Q4 and 2022, what are the biggest challenges you foresee, aside from the surplus of data & data providers available? Will 'validated' or 'audited' data providers become more of a trend?

Data without question will be a key component moving forward for OOH, especially with increasing demand from a far more savvy customer base. One of the challenges the OOH medium faces will be the ability to "harness and bring together" the many unique data touch points from the numerous data suppliers and what they have to offer under one "streamlined easy to use and seamless solution".

Steve McGregor, President, **PATTISON Outdoor**

streamlined
easy to use and
seamless **solution**

A common audited source would be ideal, however many data providers are offering more dynamic data and targeted data which is attractive to a variety of advertisers. The single source would have to step-up to the level of the most attractive data being provided presently to be considered valuable.

Claude Foisy, Vice President, **QUEBECOR**

more dynamic data and targeted data

One of the biggest challenges I see for OOH with the new volume of data coming at us is being careful to use the data to reflect the powerful impact of OOH rather than drowning in it. We have a media that delivers incredible impact; massive audiences and now detail on the who and the where of the impact of that delivery. However, we have to hold true to our power and our story: which is the strength of a one-to-many media in a world where most other media are highly fragmented with declining reach abilities.

Michele Erskin, CEO, **OUTFRONT**

There continues to be a spotlight on privacy regulation and it's imperative that we all understand how data is gathered and used. We are committed to only using privacy-compliant data insights that have been regularly audited by an independent third party to ensure integrity, accuracy and compliancy. Respecting privacy remains our top priority. We don't see it as a trend, but an absolute necessity.

Farshad Kajouii, Vice President – Pricing, Operations & OOH, **BELL MEDIA/ASTRAL**

As an industry we need to better communicate the values and the differences between the variety of data that is available today so our clients can better understand when to use it and how to apply it. We also need to know more about the data we are buying – if it is fraud-free, how much scale do we need to effectively run a campaign, and so on. Programmatic OOH has quickly driven the demand for data and as we head into 2022, we need to ensure that there is full transparency of everything that we are paying for.

Jennifer Bidwell, Executive Vice President, Sales, **ALLVISION**



need to know
more about the
data **we are buying**

7
What trends emerged within your organization because of shifting work environments due to COVID? Any great lessons learned that you'll bring into Q4, 2022 and beyond?

We believe the FLEX Schedule for the majority of our staff will become the norm moving forward, especially with growing demand from our current staff, as well as the expectation from the public domain when seeking new employees. We have introduced a hybrid model and will closely monitor it throughout the remainder of 2021 and into 2022.

Steve McGregor, President, **PATTISON Outdoor**



Since the pandemic, we have had to refine our digital networks (ex: downtown, hip town, etc) in order to better reflect changes in audience distribution. Although it is still uncertain, as we emerge from the pandemic, we do not believe that traffic patterns will ever revert to what was pre-pandemic. Within our offer, we have found that client advertisers are looking for increased flexibility for such factors as cancellation policy & specific sites.

Claude Foisy, Vice President, **QUEBECOR**

looking for increased flexibility

I would say agility and connectivity. I am proud of my team at OUTFRONT but also our whole industry frankly. Pivoting to a mandated work from home environment, almost overnight, was tough but we more than rose to the occasion. We figured out how to do that, how to stay connected through the many video conferencing options; how to look out for each other and boost each other's morale when it flagged, to look for the positive and to put the people part first. Now we are coming out of this even stronger. We have committed to not allowing a "head office centric" attitude to creep back into our conduct as we move forward, and to allow that the flexibility of including remote work as a larger component of the work/life balance can be a benefit to productivity rather than a deterrent. And I hope the joy of seeing people in person is appreciated for a long time to come.

Michele Erskin, CEO, **OUTFRONT**

During the pandemic, we have found new ways to work and recognize that flexibility will be part of our future; however, we do believe that the return to the office still remains important for collaboration, innovation and connecting with colleagues.

One of the great lessons that we learned during COVID was seeing how much our products matter to Canadians. As a company, we were able to help Canadians stay connected, but most importantly, we were able to adapt and act with remarkable speed.

Farshad Kajouii, Vice President – Pricing, Operations & OOH, **BELL MEDIA/ASTRAL**

help Canadians stay connected





This is interesting because we launched in the thick of the pandemic, in July 2020, and our team didn't come together for the first time until June of 2021. We've proven that we can successfully build a company from the comfort of our homes, but I think that if you paneled our team they would all say that we need more face time and in-person collaboration with each other. While we all love having flexibility, we are excited that we will be safely moving into our first office in Q4.

Jennifer Bidwell, Executive Vice President, Sales, **ALLVISION**

more face time
and in-person
collaboration

Thank You!

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