



FALL 2018

Impressions from the President/CEO

Looking back on 2018 and forward to 2019, I am confident in the continued advancement of the outdoor advertising industry in Florida. The future holds exciting opportunities for our industry as we continue to develop innovative and creative ways to deliver information to consumers and bring value to the economy.

FOAA remains on the frontlines ensuring that our united industry voice is heard and that a fair balance between public interests and private property rights exists. This annual newsletter contains updates on the status of our initiatives and the collective work we are doing to advance the interests of the outdoor advertising industry. As always, thank you for your support and membership!

Charlotte Audie, President & CEO

In this issue, you will find information on:

- Legislative & Regulatory News
- Public Service Campaigns
- National Trends & Industry News
- FOAA News & Events
- New Members
- Preferred Vendor Partnership
- Good Work Submissions

FDOT and Rules Update

Staff Change

In March 2018, Mr. Dana E. Marcum was named to the position of Project Manager, Resource and Vegetation Management, within the Office of Right of Way. Immediately prior to joining FDOT, he was the Tax Deed Coordinator for the Leon County Clerk of Court, Finance Department. In his new position, Mr. Marcum will be responsible for oversight of the Right of Way Training Program, Right of Way Work Program, Right of Way Records and Funds Management, as well as the Vegetation Management at Outdoor Advertising Signs Regulatory Program.



Vegetation Management

FOAA continues to work with FDOT to address needed revisions to the sections of Chapter 14-10, F.A.C., pertaining to vegetation management. FDOT held a rule development workshop, requested by FOAA, in April 2018 to receive public comment on the proposed rule language.

The proposed rule allows for the use of a Certified Forester for the preparation of a vegetation management plan, provides for a reduction in the application review time from 90 days to 60 days from Department receipt, and provides that applications may be submitted either electronically or through mail.

All vegetation permits will be issued for a period of 5 years and FDOT will accept a cover letter along with the previously approved application in lieu of a new application form for renewals. Language was removed from the current rule that prohibits maintaining a sign's view zone if that maintenance allows for more than 500 feet visibility.

The proposed rule also includes a revised formula for calculating vegetation mitigation that provides a more fair and reasonable mitigation valuation for the removal of vegetation.

Highway Beautification and Landscape Management

In June 2018, changes to Rule Chapter 14-40 pertaining to highway beautification and landscape management went into effect. FOAA participated in a rule development process and provided written comments to FDOT prior to the rules changes.

Florida Statutes currently provides that "plantings" may not screen an outdoor advertising sign. The new rule expands on that in subsection (3)(b) to prohibit screening by "any planting or installation of vegetation or other landscape component for landscape projects". The updated rule also provides for written notification to the sign owner of proposed landscape projects proposed within 1,000 feet approaching legally erected and permitted outdoor advertising signs.

For FDOT updates throughout the year, please contact foaa@FOAA.org to be added to the FOAA Snapshot e-newsletter list.

2018 Legislative Session

A total of 3,192 bills were filed during the 2018 legislative session with fewer than 200 bills passing. No industry specific legislation was filed. Each of the individual bills monitored by FOAA either died in committee or were withdrawn from consideration.

There were two issues addressed in the budget and the tax package of interest to the outdoor advertising industry and supported by FOAA:

- \$76 million was included in the budget for VISIT FLORIDA. This amount fully funded VISIT FLORIDA at its current level.
- The final tax package included another reduction in the sales tax on commercial leases from 5.8% to 5.7%, reducing taxes by \$31.0 million annually.

The 2018 FOAA Legislative Fly In was held on January 24-25 in Tallahassee, FL. Special guests included FDOT Assistant Secretary Brian Blanchard, State of Florida Chief Financial Officer Jimmy Patronis and Representative Bobby Olszewski.

Stay tuned for information and the Save the Date for the 2019 Legislative Fly In! The Florida Legislative Session begins March 5, 2019.



PUBLIC SERVICE CAMPAIGNS

FOAA's public service program is going strong! Thank you to all of our members for your continued statewide support of civic, charitable, and governmental projects necessary for local communities to develop and grow. Here are a few campaigns that have been the favorites of 2018 so far!

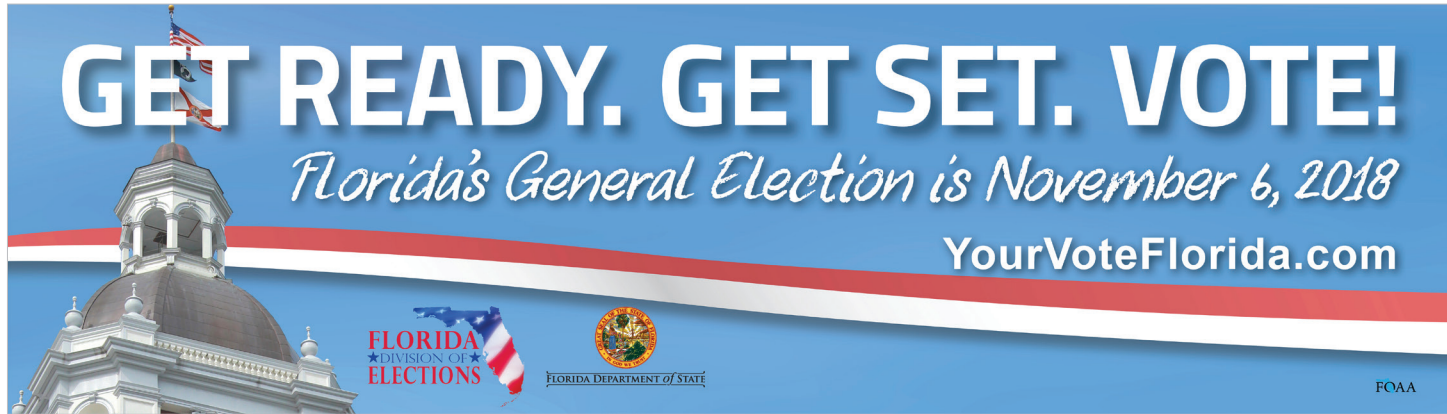
Florida Department of Transportation “Put it Down”: Raising awareness about distracted driving. Driver distraction is a rapidly growing problem as the use of handheld communication devices and other technologies continue to advance. FDOT is committed to eliminating crashes that are attributable to distracted driving and has developed the Put it Down campaign which focuses on helping drivers: to understand the problem of distracted driving, to recognize the risks and consequences associated with distracted driving, to implement specific steps to help eliminate distracted driving within their families, schools, businesses or organizations, to keep themselves, other drivers, passengers and pedestrians safe on our roadways, and to understand the distracted driving law in Florida.



Florida RV Association: An effort to direct people to FRVA's website www.frvta.org for all of their camping/RVing needs.



Florida Department of State “Voter Registration”: An effort to encourage voter participation and awareness. We’re looking to encourage voters to check their voter registration, or to register to vote, to update their signature, to become familiar with their ballot, and the ways in which they can vote.



GET READY. GET SET. VOTE!
Florida's General Election is November 6, 2018
YourVoteFlorida.com

FLORIDA DIVISION OF ELECTIONS
FLORIDA DEPARTMENT OF STATE
FOAA

This banner features a blue background with a white and red wavy line. On the left is a photograph of the Florida State Capitol dome. The text is prominently displayed in white and blue. Logos for the Florida Division of Elections and the Florida Department of State are included, along with the FOAA logo in the bottom right corner.

Florida Department of Highway Safety and Motor Vehicles “Summer Travel”: Providing education and awareness to all Florida motorists, targeted specifically young adult males, on the importance of preparing and operating your vehicle safely for summer travel, including: tire safety and vehicle preparation before a trip and making sure all vehicle occupants are properly buckled up. The department will place a particular emphasis on the call to action, Arrive Alive.



SLOW DOWN, STAY COOL
Safe Summer Travel

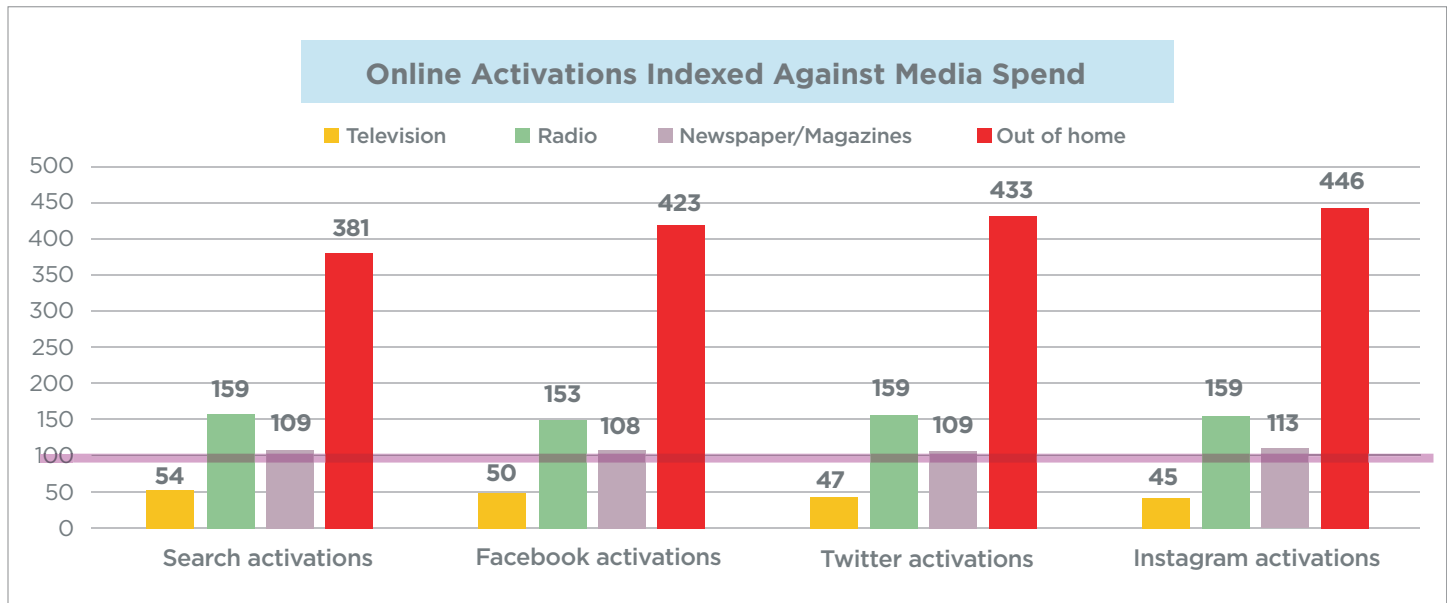
FLORIDA DEPARTMENT OF HIGHWAY SAFETY AND MOTOR VEHICLES
Public Service Provided by the Florida Outdoor Advertising Association

This banner has a tropical beach scene with palm trees and a yellow car with a surfboard on the roof rack. A banner held by a fish-shaped character reads "SLOW DOWN, STAY COOL". The text "Safe Summer Travel" is written in a large, stylized font. Logos for the Florida Department of Highway Safety and Motor Vehicles and the Florida Outdoor Advertising Association are at the bottom.

Want to know more about industry trends and OOH impact? Check out these highlights from Nielsen surveys commissioned by OAAA.

OOH Drives Online Action

A 2017 study by Nielsen found OOH drives more online activity per dollar spent when compared to other offline advertising including television, radio, and print.



SOURCE: http://bit.ly/OAAA_NielsenOOHOnlineActivationSurvey

Digital Makes a Difference

A 2015 national survey conducted by Nielsen that included the Tampa market focused on the impact of digital billboards.

Key findings included:

- Digital billboards get noticed regularly. 75% of those surveyed noticed a digital billboard in the past month. Of those respondents, 60% a digital billboard in the past week.
- Travelers were engaged with digital billboard messaging. Over half (55%) of those surveyed who noticed a billboard in the past month said they noticed specific messages on the billboard either every time or most of the time they pass one.
- Nearly three-quarters (71%) of digital billboard viewers felt digital billboards stand out more than online ads.
- Digital billboards are recognized as local information sources. 65% of past month digital billboard viewers consider them a good way to learn about new businesses in the area, and 61% agree digital billboard are a good way to learn about sales and events.
- Digital billboards drive in-person action. One in five viewers (22%) have changed plans to visit an establishment based on what was featured on a digital billboard.

SOURCE: http://bit.ly/OAAA_NielsenDigitalBillboardSurvey

Population Projections and Trends

According to EASI Demographics, Florida is projected to be the sixth fastest-growing state in the U.S. from 2018-2023. As populations grow, OOH has more opportunities for engagement. Taking demographic trends into account can help OOH make the most of new audiences and increased travel.

In April 2018, Pew Research Center released a list of seven demographic trends that are shaping the U.S. and the world:

1. Millennials are already the largest generation in the U.S. labor force (35%) and are projected to outnumber Baby Boomers next year. The Millennial generation, defined as Americans born from 1981 to 1996, corresponds to adults ages 22 to 37 in 2018.
2. Even with economic improvements, there is a trend toward more shared living. One in five Americans, a record number, live in multigenerational households.
3. The institution of marriage continues to change. Half of U.S. adults today are married, similar to statistics in recent years, but that share is down significantly over previous decades. Cohabitation among unmarried partners is rising, including among a growing share of unmarried parents.
4. Motherhood and family size are ticking up in the U.S. after years of decline. There has been a substantial increase in motherhood over the past two decades among women who have never been married. Parenting is changing in America as fathers and mothers are spending more time caring for their children than in the past, even as mothers spend more time working outside the home than they did in previous decades.
5. There are more than 250 million migrants worldwide, according to the latest data from the United Nations on the number of people living outside their birth countries in 2017.
6. New refugee arrivals are down in the U.S. The number of refugee arrivals in the U.S. declined after 2016, even as the global refugee population increased.
7. International arrivals to the U.S. have risen among some groups including new foreign students, immigrants from El Salvador, Guatemala and Honduras, and black immigrants.

For more demographic details and insights for OOH, OAAA members can access the Nielsen OOH advertising study.

Sources: EASI Demographics, Pew Research Center

SAVE THE DATE

Next year's FOAA Annual Convention is scheduled for September 25-27, 2019 at the Casa Marina in Key West, FL. Mark your calendar!



FOAA Retiring Board Members

With great appreciation we recognize the following board members for their contributions to the outdoor advertising industry and their service to the Florida Outdoor Advertising Association.



KEVIN KITTO - KOALA OUTDOOR, OWNER

Kevin arrived in the United States from his native New Zealand in 1973. He began Koala Outdoor in 1987 and joined the FOAA Board of Directors in 2000. He was subsequently elected Treasurer in 2003. In addition to his service to FOAA, Kevin was twice elected to serve two terms as a Council Person in Dundee, FL before being elected Dundee's Mayor. He is also a founding Member of the Polk Business for World Class Education. After 31 years in the outdoor advertising industry and 18 years serving on the FOAA Board of Directors, Kevin sold Koala Outdoor and is enjoying retirement with his family.



BILLY LONG – OUTFRONT MEDIA, GENERAL MANAGER, SOUTH FL

Billy has been a member of the FOAA Board for 12 years. He joined the Board in 2006 and was elected Vice Chair in 2016. He also serves on the OAAA Multicultural Committee and the Miami Beach Chamber of Commerce. Billy began his career in outdoor advertising as an Account Executive in 1999 with CBS Outdoor. After more than 12 years as the General Manager for Outfront Media's South Florida office, Billy accepted a position as EVP, OOH Practice, Account Management at Publicis Media in Pompano Beach.



RANDY OXENHAM – VICE PRESIDENT & GENERAL MANAGER, LAMAR ADVERTISING, PENSACOLA

Randy began his career in outdoor advertising in 1970. He started at Lamar Advertising in 1991. Randy joined the FOAA Board in 2007 and was elected Secretary in 2011. He is a U.S. Army Special Forces Veteran and was awarded several medals of distinction during his service to our country - Bronze Star (2), Air Medal (2). Randy's many achievements also include: President Los Angeles Raider "65 Roses" Cystic Fibrosis, Honorary Deputy Sheriff – Los Angeles Sheriff's Department, Board of Directors – United Way, Board of Directors – Five Flags Rotary, Board of Directors – Pensacola Sports Association, Board of Directors – Pensacola Cultural Center, Board of Directors – YMCA, Chairman of the Board – Covenant Hospice, Chairman of the Board – WSRE-TV, Santa Rosa County Board of Adjustments, Civilian Award – Escambia County Sheriff's Department, Civilian Award – US House of Representatives and football coach at Gulf Breeze High School. After 48 years in the outdoor advertising industry and 11 years of serving on the FOAA Board of Directors, Randy retired in June 2018 and moved to his mountain home in South Carolina.

Florida Missing Children's Day

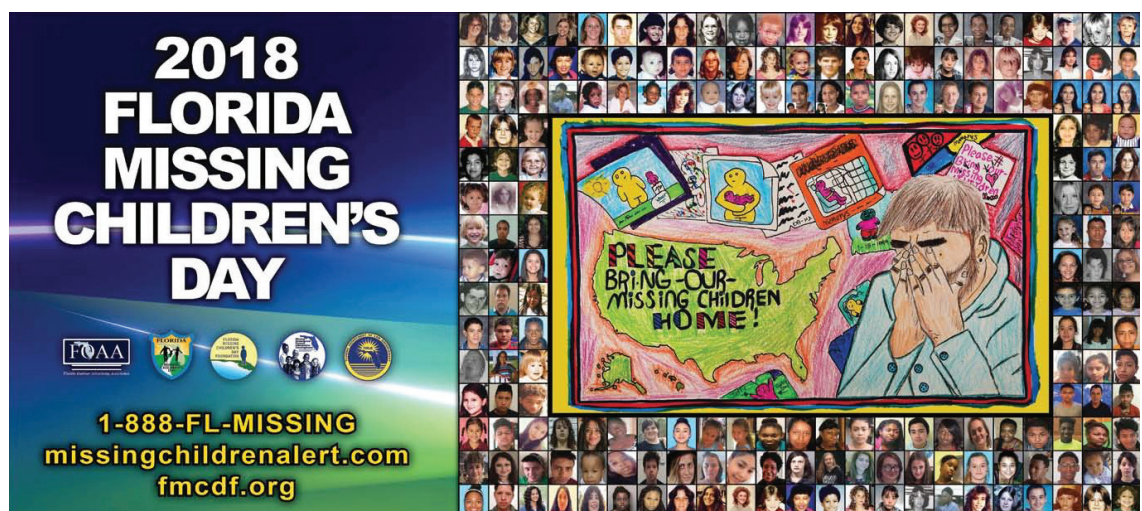
For more than 10 years, the FDLE Missing Endangered Persons Information Clearinghouse has partnered with FOAA in producing and distributing billboards statewide featuring Florida's missing children.

As proclaimed by Resolution of the Florida Legislature, Florida Statute 683.23, the "first ever" Florida Missing Children's Day was held on Monday, September 13, 1999.

Each year parents, children, law enforcement officers and citizens gather to remember Florida's missing children who are still missing and those who will never come home again. The Governor, Lieutenant Governor, and FDLE's Commissioner are invited as speakers.

The objective of this day is to raise awareness of Florida's currently missing children, to educate the public on child safety and abduction prevention, and to recognize those individuals and law enforcement officers who have made outstanding contributions in the missing children issue.

This year, Florida Missing Children's Day was on September 10, 2018 at the Capitol in Tallahassee.



Please help us give a warm welcome to the following new association members:



- **Lightking:** In 2007, Timur Colak was looking for a new business venture. He found it in a sign company in Miami named Modern Display, which he acquired with the intent to modernize and grow the business. Lightking Outdoor believes in keeping the company small and the operations simple. Sure, they could expand their product offerings to include LED lighting, but that would compromise their focus on LED signage, and they aren't willing to sacrifice time or resources just to turn a quick profit. Instead, the company's long game is grounded in economy of scale: offering fewer SKUs results in fewer service issues; more knowledgeable, efficient workers and lower costs. Lightking Outdoor's modular products cut their lead time from the industry standard of eight weeks to as little as one day. www.lightkingoutdoor.com



- **Associated Posters:** Since 1962 we have been specializing in Large and Grand format printing. Api delivers the quality that you and your clients deserve with a turn around time that meets your production requirements. Put their years of experience to work for you with your next Out of Home or POP project. Large or small they offer it all. www.associatedposters.com



- **National Builders Group Corporation:** At National Builders and Inspections Services division we erect the steel structures, lighting and supports for Banners and provide we also installation and removal of the same. Banners are the largest of the standardized outdoor advertising structures located primarily on major highways, expressways or principal arteries. These Banners rapidly achieve high levels of exposure. In an era when traditional advertising is becoming fragmented and losing impact, the outdoor medium continues to grow. <http://www.nationalbuildersgroup.com/outdoor.html>



- **View Outdoor Advertising:** Our mission at View Outdoor Advertising is simple – to bring commerce to your business through the medium of outdoor advertising by providing excellent customer service, eye-catching design and key locations throughout Indiana, Illinois and the Chicagoland area. With over 575 locations carefully developed over the past seven years, View Outdoor Advertising has been successful by combining highly visible sites with knowledgeable, personal service. Over the years, we've grown our business with the types of locations that advertisers are looking for: sites that deliver high traffic counts, strong demographics and optimum visibility in the marketplace. Our history makes us what we are today. In 1935, our

founder, Dean V. White, established Whiteco Outdoor Advertising – one of the leading outdoor signage companies in the United States. He sold his U.S. assets in 1998, but continued his international billboard operations in China. With a continued passion for the business, Mr. White founded View Outdoor Advertising in 2004. www.viewoutdoor.com

- **Blanchard & Associates:** New associate member from Boca Raton, FL.

PREFERRED VENDOR PARTNERSHIP

FOAA is proud to partner with MyOfficeProducts as a preferred vendor. MyOfficeProducts is the largest independent national office supplier in the US representing over 35,000 office consumable items, to help lower the operating cost of your business!

The logo for MyOfficeProducts features the word "My" in white on a black background, followed by "OfficeProducts" in black on a yellow background, all enclosed in a black rectangular border.

**SHOW & TELL:
Members Invited to
Share Their Good Work**

WANT TO KNOW MORE ABOUT WHAT'S GOING ON AROUND THE STATE? SO DO WE!

Statewide, our public service programs and alert partnerships set a high standard for the rest of the industry nationally. These initiatives would not be successful without our members' remarkable support and generous donations of space. So we want to brag about you!

If you are engaging in local activities that you would like to share with the membership, we want to hear from you! Please contact foaa@foaa.org with stories about your public service or other hometown initiatives.

And thank you for participating in these programs that promote our organization as the shining example of cooperative public service!



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