Where OOH fits within the media flow
Contents

1. About the new media flow
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3. Where OOH fits in
1. About the new media flow
We need key insights into multi-media
Media habits by day part and much more
TouchPoints confirms OOH’s importance

- OOH = 31% of adult daily media consumption
- Watching Commercial TV: 34%
- Using The Internet: 19%
- Listening To Commercial radio: 11%
- Reading Newspapers: 4%
- Reading Magazines: 1%

Source: IPA TouchPoints3
We can see media habits by demographic

Source: IPA Touchpoints 3 Hub Healthy and Fit 16-34 year olds average weekday media consumption
And the 360 degree complexity of life and media flows.
The “media flow” concept simplifies this complexity
The evolution of the media flow
The evolution of the media flow
The evolution of the media flow

19th Century

20th Century

21st Century
Media puts brands into a person’s life flow
Dramatic increase in media

— We’ve moved from media scarcity to digital media surplus
— People are living with and within a multi-media world
— People are more mobile – benefits OOH, but competition is intensifying
Life flow

— People move constantly from ‘not buying’ to ‘buying’ mode
— dunnhumby estimate the average household makes **21 purchases a day**...
— ...with main grocery shoppers buying an average of **16 items daily**
Media flow

— Digital technology enables people to step in and out of the media flow at will
— Most youngsters live in the media flow
— Accenture estimate the average UK individual is exposed to 1,009 commercial communications daily
Navigating the flow

— Media planners need to place the brand in the media flow where the customers are stepping in
— But they step in at different points on the spectrum of ‘not buying’ to ‘buying’
— So the media mix must account for this
— OOH needs to secure its place in this highly competitive environment
Each medium a ‘fisherman’s fly’ to choose
2. What’s proven to work
30 years of cases to analyse and learn from
More media options and media usage

<table>
<thead>
<tr>
<th>Year of competition</th>
<th>No. media options listed in author questionnaire</th>
<th>Average no. media used by winners</th>
<th>% of media options utilised by winners</th>
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<td>1980</td>
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<td>2.40</td>
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<tr>
<td>2010</td>
<td>20</td>
<td>9.18</td>
<td>45.90%</td>
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</tbody>
</table>
92% of winners use TV: OOH a core medium

Average number of additional media used by a medium 2002-2010

Key findings from IPA Effectiveness Awards

- Emotional is better than rational in commercial communication
- ‘Fame’ is the most powerful driver of effectiveness
- TV most effective medium, leverages others
- Multi-media (3 or 4) are more effective than 1
- If TV is a ‘given’ in most cases, where does OOH fit in?
Five key roles for media in brand building

— **Fame**: creating ‘buzz’ and ‘talkability’
— **Advocacy**: enabling word-of-mouth/mouse
— **Information**: providing the product detail
— **Price**: price points and special offers
— **Availability**: telling customers where to buy

F.A.I.P.A. = five ‘fisherman’s flies’
3. Where OOH fits in
Which F.A.I.P.A. roles does OOH fulfil?

— Fame
— Advocacy
— Information
— Price
— Availability
OOH can certainly create fame
Hard for OOH to enable customer advocacy
OOH can communicate information well
OOH can communicate ‘headline’ price
OOH can point to availability
Degrees of OOH suitability for F.A.I.P.A.

— **Fame** ✓
— **Advocacy** x
— **Information** ✓
— **Price** ✓
— **Availability** ✓
Summary

— ‘Fame’ and emotional communication most powerful drivers of effectiveness and ROMI
— 3 or 4 bought media is optimum mix (but no limit to benefits of ‘owned’ and earned’)
— TV proven most effective medium
— Increased number of screen-based media platforms and bandwidth means more ‘TV’
— OOH digital is a key player in this trend
Conclusions

— People live increasingly in the media flow stepping in and out at will
— They move often from ‘not buying’ to ‘buying’ mode
— Media skill is putting the brand into the flow where and when it helps the customer
— OOH fulfils four out of five key F.A.I.P.A. roles in the ideal media mix
— OOH is a great partner for TV
Use F.A.I.P.A. model to get OOH picked