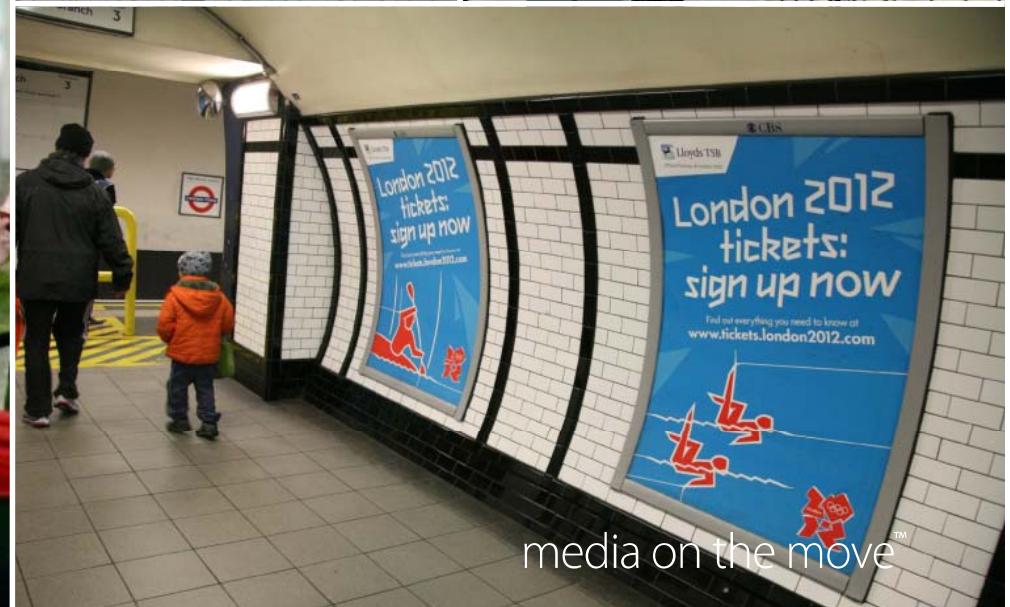




Europe on the Move

Anna Reeves
International Marketing Director
CBS Outdoor International

media on the move™



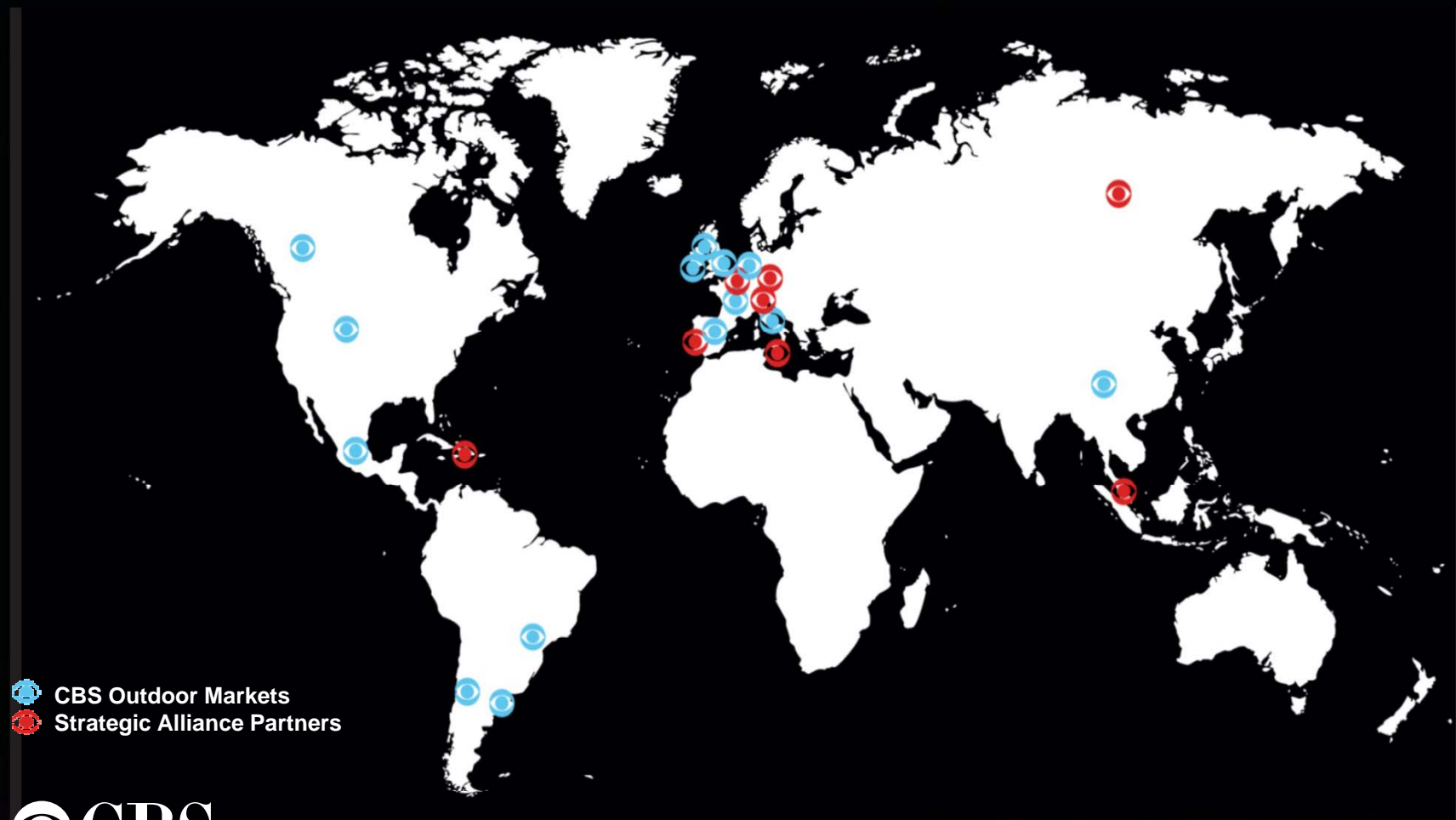
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Our Markets and Strategic Alliances



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CBS Corporation



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Europe on the Move

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A Different Perspective

and Emotions

Behaviours, Attitudes
and Emotions

A different
perspective

“

Often I see something during my morning route.
At lunchtime I go online and find the site of
which I've seen the ad. Perfect!

”

Tanja, Netherlands

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Europe on the Move

9,665

respondents

6

markets

474

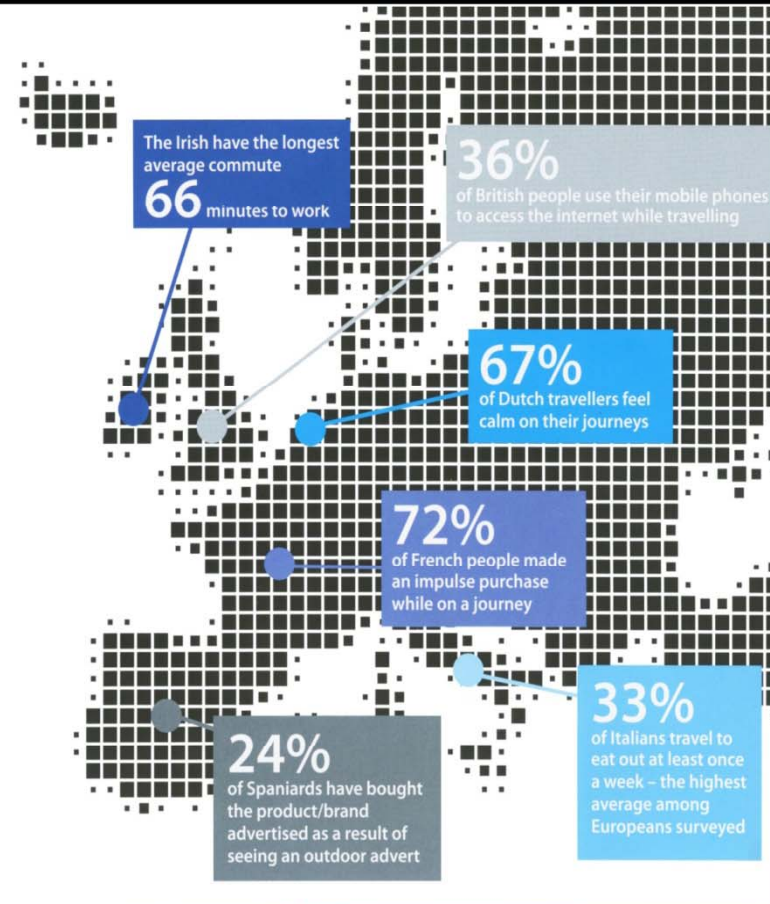
online
survey questions

3,002

mobile survey
responses

289,950

hours of internet
research



People on the Move

Size and nature of the audience:
realising the opportunity



Highly **educated**

Vibrant, sophisticated and **eclectic**

Six major European Markets

241 million people

Highly **mobile** and connected

€

Tourism capitals of Europe

Predominantly **urban**

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People on the Move

Some Insights



56% work full time.

51% earn over 30,000 euros per year.

Average daily journey **46km**.

Left home **11 times** per week.

People on the Move

Multi-tasking!



Top 5 activities on the move

1. Listened to music/radio
2. Spoke to friends who were with you
3. Saw advertising on posters or billboards
4. Thought about everyday products I needed to buy
5. Thought about planned work

Top 5 activities whilst waiting for public transport

1. Saw advertising on posters or billboards
2. Listened to music
3. Texted using a mobile phone
4. Read a newspaper or magazine
5. Spoke on a mobile phone

Busy Journeys

The end of "Dead Time"



“I have an iPhone...I surf the web, check email, twitter, Facebook, use Google maps for directions, take photo's, videos' make video calls' listen to music, play games, watch videos, You Tube, read ebooks, it's a huge leap forward from 5 years ago.”

Gonzalo, Madrid

Influencing on the Move

Dayparts!



Opportunities to Influence

Hungry?

28% of people think about groceries in the morning.



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What's on TV?

The majority of respondents (57%) think about TV programmes in the evening.

Get me out of here!

More respondents (40%) think about holidays while they are out in the afternoon than when they are at home in the evening (7%).



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Mixed Media

Amplifier Effect of OOH



“

You've already heard it on the radio or TV, then you see it and notice it when you're out and about. Eventually when you're making a purchase it's always the first to come to mind.

Adriano, Italy,

”

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Engaging on the Move

“

The Esselunga print and billboard ads were great, rather unique and it still brings me out in fits of laughter; they twisted celebrities' names to advertise food produce. It was utterly simple but so clever! A white background, a lemon with round sunglasses and a name: John Lemon...brilliant!

”

Anna, Italy

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Amsterdam Centraal

American Apparel

Centrum
Utrechtsestraat 85

Noordermarkt
Westerstraat 59



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39%

of European people have made an
impulse purchase in the last week.

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Prompting Awareness on the Path to Purchase

Likely to buy on the spur of the moment...

Snacks: **22%**

Shoes (women): **54%**

Food or groceries: **37%**

Prompting Awareness on the Path to Purchase

Clothes:

65% 15-24 Women

60% 15-34 Women

Soft drinks:

36% 15-34 Men

Cosmetics/Toiletries:

39% 15-34 Women

Magazines:

31% 15-24 Women

Impulse Purchases



“

It is very important to have out of home ads. For instance, if your walking around the shops with something on your mind, you can forget a few things that you might need. The ads can remind you of them.

James, London

”

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Outdoor leads to action



- Whether it's researching, referring a friend or making a purchase over 65% of people have done *something* as a result of seeing an Outdoor advertisement.

Strong Relationship between OOH and Mobile

**17% of young people
access the internet
on their mobile while
shopping – 25% on
Saturdays!**



“

I've have quite often done an online search on my iPhone in response to outdoor advertising. I have seen a film poster & checked whether or not it's on in my local cinema, I've seen ads for upcoming TV programmes that have led me to set my Sky+box to record them via the sky record app on my phone.

Niall, Dublin

”

“

I tend to google when I'm not driving so anything I see (on) posters: furniture, computers, any advertising that catches my interest I would look up straight away.

Stephanie, Paris

”

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The trend is set to continue...



“

I have done searches on my phone for things I have come across while on the move.

”

Karen, London

- **77 million smartphones were shipped globally in the Q3 2010**
- **Smartphones to overtake PCs in accessing the internet by 2013**

“

The possibilities are huge: smartphones can interact with all sorts of media, using their cameras to take pictures of coupons or barcodes, or web browsers and apps for virtual offers and information.

”

Kate, Manchester



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Thank You
www.europeonthemove.com

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