Our Markets and Strategic Alliances
Europe on the Move
A Different Perspective

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

- The Irish have the longest average commute: 66 minutes to work
- 36% of British people use their mobile phones to access the internet while travelling
- 67% of Dutch travellers feel calm on their journeys
- 72% of French people made an impulse purchase while on a journey
- 24% of Spaniards have bought the product/brand advertised as a result of seeing an outdoor advert
- 33% of Italians travel to eat out at least once a week – the highest average among Europeans surveyed

CBS OUTDOOR

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People on the Move
Size and nature of the audience: realising the opportunity

Highly educated
Six major European Markets
Vibrant, sophisticated and eclectic
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

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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!

Key:
- Shopping
- Holiday
- Television

0%
10%
20%
30%

As soon as I get up in the morning
On various occasions throughout the morning
During lunchtime
On various occasions throughout the afternoon
Early evening
During the evening
Last thing at night before I go to bed

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Opportunities to Influence

Hungry?
28% of people think about groceries in the morning.

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%).
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.
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
39% of European people have made an impulse purchase in the last week.
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%

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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
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
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
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

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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
Thank You
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