UK Outdoor shifts up a gear
A year is a long time in media
Agenda way points

• The London Olympic Games 2012
• Launch of Route and new learnings
• Return on investment report
• Missing People
• The voice of the consumer
  – YouGov “Public perceptions of posters”
  – Customer Journey
  – Voxpops
• The revenue effect
How the Olympic and Paralympic Games were sold

- Outdoor media auction process Spring 2011
- Sponsors were given exclusive access at that time
- £40m traded before July 1, 2011
- Vicinity sites could be sold to sponsors only
- OMC lobbied to extend to “safe” categories eg tourism
- 6 months before the Games, the marathon route, cycling route, triathlon route, walking route were all designated vicinity zones: additional 350 miles and 2,000+ panels suddenly out of bounds
London 2012: a short video history
62% of Games visitors noticed Outdoor advertising during the Games.

The advertising dominated airports, buses, taxis, shopping malls, roadside, rail and Underground.

Source: YouGov, August 2012
Outdoor advertising can give advertisers strong links with sporting events

- Outdoor advertising helped make London 2012 the greatest show on earth.

- **56% of Games visitors** think that outdoor advertising is a good way for advertisers to show their links with large sporting events and festivals.

Source: YouGov, August 2012
Outdoor adds colour and vibrancy

- **52% of Games visitors** thought the outdoor advertising added colour and vibrancy to the Games.

- Outdoor was at the forefront of the Games, spreading Olympic fever with colourful wraps and enormous banners.

Source: YouGov, August 2012
Commercial effect of the 2012 Games

- Q3 effect +25%
- Q3 London +48%
- The 22 leading sponsors spent 20% of their total media spend in outdoor (normally 10%)
- Full year effect +9.5%
Route key facts

- £19m investment over 6 years
- 28,000 respondents after year 4
- GPS tracking for 9 days
- Covers 95% of outdoor: Roadside, bus, Underground, rail, supermarkets, shopping malls, airports
- Day of week and dynamic frames
- Net visibility adjusted measure
- Focus on audience not panels
- A study of human behaviour and mobility
2 week coverage – bus and roadside

**Superside**
Bus - 2 week cover (%)
all adults GB 15+ (Release 5.01)

**T-Side**
Bus - 2 week cover (%)
all adults GB 15+ (Release 5.01)

**48 Sheet**
Roadside - 2 week cover (%)
all adults GB 15+ (Release 5.03)

**Rear**
Bus - 2 week cover (%)
all adults GB 15+ (Release 5.01)

**6 Sheet**
Roadside - 2 week cover (%)
all adults GB 15+ (Release 5.03)

**Phonebox**
Roadside - 2 week cover (%)
all adults GB 15+ (Release 5.03)
Audience – a collection of individuals

The “average” adult sees 169 posters a week
How many posters do we see in a week?

- 0 to 10: 10%
- 11 to 50: 27%
- 51 to 169: 34%
- 170 to 340: 14%
- 341 to 600: 10%
- More than 600: 5%

People who tend to see more:
- Men
- Urban dwellers, especially Londoners
- ABC1s
- 25-44s
- Those in full time work
- Commuters
Rhythm of the ages: a modern quickstep

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Rhythm</th>
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</thead>
<tbody>
<tr>
<td>Children</td>
<td>Slow</td>
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<tr>
<td>Youth</td>
<td>Slow</td>
</tr>
<tr>
<td>Early middle age</td>
<td>Quick</td>
</tr>
<tr>
<td>Late middle age</td>
<td>Quick</td>
</tr>
<tr>
<td>Older people</td>
<td>Slow</td>
</tr>
</tbody>
</table>
Time spent in shopping malls: minutes per visit

Shoppers stay 70% longer at out of town malls

- In town malls (83): 56 minutes
- Mall average (98): 64 minutes
- Out of town malls (15): 97 minutes
More precise audience selection

- ABC1 men
- Aged 35+
- live in London TV region
- access the internet more than once a day
- watch 1+ hours of commercial TV per day during the week
- definitely agree with the statement ‘I enjoy entertaining at home’
- 113 respondents

Source: Route / Telmar 2013
More precise audience selection

- women
- aged 25-44
- married
- in full-time job (30+ hours / week)
- goes to the cinema once a month
- listens to up to 3 hours of commercial radio on a Sunday
- 104 respondents

Source: Route / Telmar 2013
Better proximity planning: Birmingham Selfridges Store, 10 miles catchment
Better proximity planning: 534 roadside frames in the zone, 1.633m ABC1 adults

Source: Route / Telmar 2013
Waterloo Station: where do they all come from?
Waterloo Station: where do they all come from?
4000 Tube car panel campaign, London: 1.3m net adults, but are they all Londoners?
4000 Tube car panel campaign, London: 78% Londoners, 22% from other areas
Route: still plenty of work to do

• Shifting the habits of a lifetime
• Delivering new environments (malls, rail, supermarkets, airports) by spring 2014
• How outdoor planning can be optimised across environments
• How outdoor adds incremental cover to other media (Touchpoints channel planner)
Missing People initiative

- 11 media owners involved with Missing People charity
- Images and advertising copy managed and coordinated centrally
- 170 people publicised as missing
Missing People initiative

- 11 media owners involved with Missing People charity
- Images and advertising copy managed and coordinated centrally
- 170 people publicised as missing
- 88 people found
- Calls to charity up 120 per cent
Focus on accountability: ROI

- Metastudy of 9 large UK media agencies
- Outdoor return on investment has a tenfold range, with category mix the main influence
- £0.45p up to £4.35p for every £1 invested
- Issues include data quality, regionality, low spend, mixed media blurring
- Outdoor is in the mid range of media, with TV the “most accountable”, and online display and cinema the “least accountable”
UK Public attitudes study: people have a positive attitude to posters (esp youth)

“Which, if any, of the following statements do you agree with?”

- Outdoor advertising can be clever, humorous and entertaining
- I have been introduced to new products and services by outdoor advertising
- Outdoor advertising gives me something to read while I am travelling
- Outdoor advertising keeps brands and products in the public eye
- Outdoor advertising helps to pay for, or subsidise, public amenities like bus shelters and public toilets

Source: YouGov survey of 1,692 respondents, May 2011
Travel and holiday destinations campaigns get noticed with outdoor

“Have you seen outdoor advertising for travel and holiday destinations recently?”

Urban means people who live, work or study in a large town or city

Source: YouGov, August 2012
Mobile phones and handsets campaigns get noticed with outdoor

“Have you seen outdoor advertising for mobile phone handsets recently?”

Urban means live, work or study in a large town or city

Source: YouGov, August 2012
Car brand campaigns get noticed with outdoor

“Have you seen outdoor advertising for car brands recently?”

Urban means live, work or study in a large town or city

Source: YouGov, August 2012
Retail campaigns get noticed with outdoor advertising.

“Have you seen outdoor advertising for any retailers recently?”

Urban means people who live, work or study in a large town or city.

Source: YouGov, August 2012
Entertainment campaigns get noticed with outdoor

“Have you seen outdoor advertising for new films, theatrical shows, books or music recently?”

Urban means people who live, work or study in a large town or city

Source: YouGov, August 2012
Outdoor’s sweet spot is young, urban, mobile

- City dwellers
- Commuters
- Connected people
- High earners
- Non-connected people
- Non-city dwellers
- Low earners
- Low commuting
- 25 to 44 year olds

Notice out-of-home advertising a lot

Buy because of OOH a lot

Source: The Customer Journey 2012, ICM Research and OnDevice Research
Half of all people in the market for perfume & fragrances have bought because of OOH

One third of the population have bought a product or signed up to a new service as a consequence of seeing some outdoor advertising, but this rises to 50% for people in the market for perfume & fragrances

Across all products

- Don't know, 20%
- Yes, 35%
- No, 45%

People in the market for perfume & fragrances

- Don't know, 19%
- Yes, 50%
- No, 31%

Source: The Customer Journey 2012, ICM Research and OnDevice Research
OOH’s Share of Voice of effective encounters, at each stage, and across all categories

Absorbing = moved to planning, obtaining or sharing
Planning = moved to obtaining or sharing
Obtaining = moved to sharing or absorbing
Sharing = moved to absorbing, planning or obtaining

<table>
<thead>
<tr>
<th>Stage</th>
<th>OOH</th>
<th>TV</th>
<th>Radio</th>
<th>Press</th>
<th>Online</th>
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<tbody>
<tr>
<td>Absorbing</td>
<td>12%</td>
<td>18%</td>
<td>4%</td>
<td>38%</td>
<td>27%</td>
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<tr>
<td>Planning</td>
<td>15%</td>
<td>15%</td>
<td>3%</td>
<td>34%</td>
<td>33%</td>
</tr>
<tr>
<td>Obtaining</td>
<td>10%</td>
<td>20%</td>
<td>6%</td>
<td>28%</td>
<td>36%</td>
</tr>
<tr>
<td>Sharing</td>
<td>13%</td>
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</tr>
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</table>
A word from the street
Outdoor’s share by category
2012 v 2011

Source: Nielsen NMR
£ million advertisers in outdoor

Source: Nielsen NMR
Steady as she goes:
7 consecutive quarters of growth

• Q3 2011 + 1.1%
• Q4 2011 + 1.4%
• Q1 2012 + 3.1%
• Q2 2012 + 9.9%
• Q3 2012 + 25.3%
• Q4 2012 + 0.9%
• Q1 2013 + 0.1%
UK Display media revenue growth
Indexed over past ten years

- Magazines
- Newspapers
- TV
- Radio
- OOH
- Cinema
Digital growth: now 20% of UK OOH

£ millions

Source: Outdoor Media Centre
Audience engagement

- Antonio Alonso «sometimes the audience watching the engagement are also very engaged»
- Samsung S4 example
Vielen Dank!

Auf Wiedersehen.