

**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



# Outdoor gets noticed



- **62% of Games visitors** noticed Outdoor advertising during the Games.
- The advertising dominated airports, buses, taxis, shopping malls, roadside, rail and Underground



# 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.



# 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



# 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

**Data to  
shape  
the future**



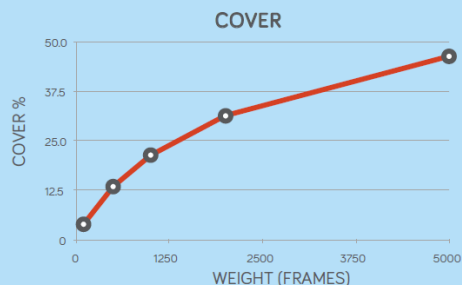
- £19m investment over 6 years
- 28,000 respondents after year 4
- GPS tracking for 9 days
- Covers 95% of outdoor: Roadside, bus, Underground, rail, supermarkets, shopping malls, airports
- Day of week and dynamic frames
- Net visibility adjusted measure
- Focus on audience not panels
- A study of human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

# 2 week coverage – bus and roadside



## Superside

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

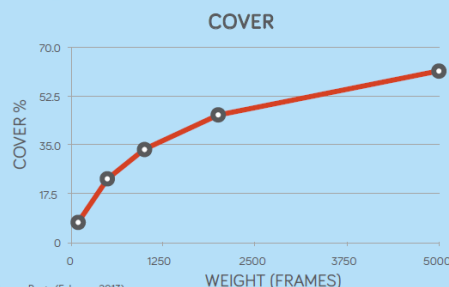


Source: Route (February 2013)



## T-Side

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

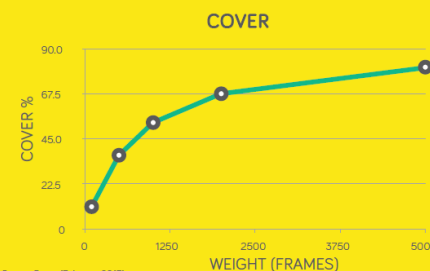


Source: Route (February 2013)



## 48 Sheet

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

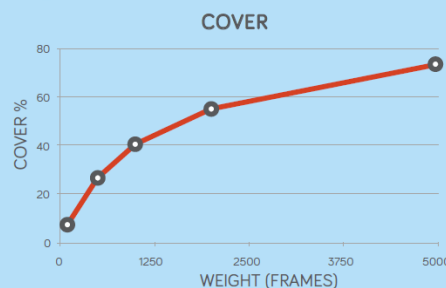


Source: Route (February 2013)



## Rear

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

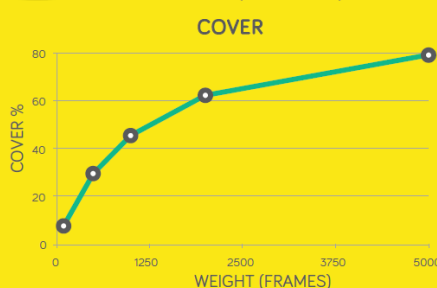


Source: Route (February 2013)



## 6 Sheet

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

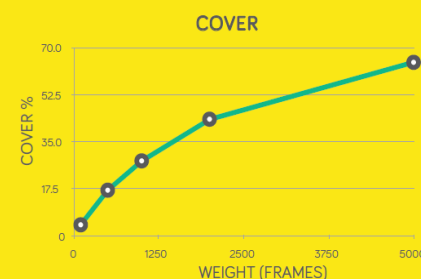


Source: Route (February 2013)



## Phonebox

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



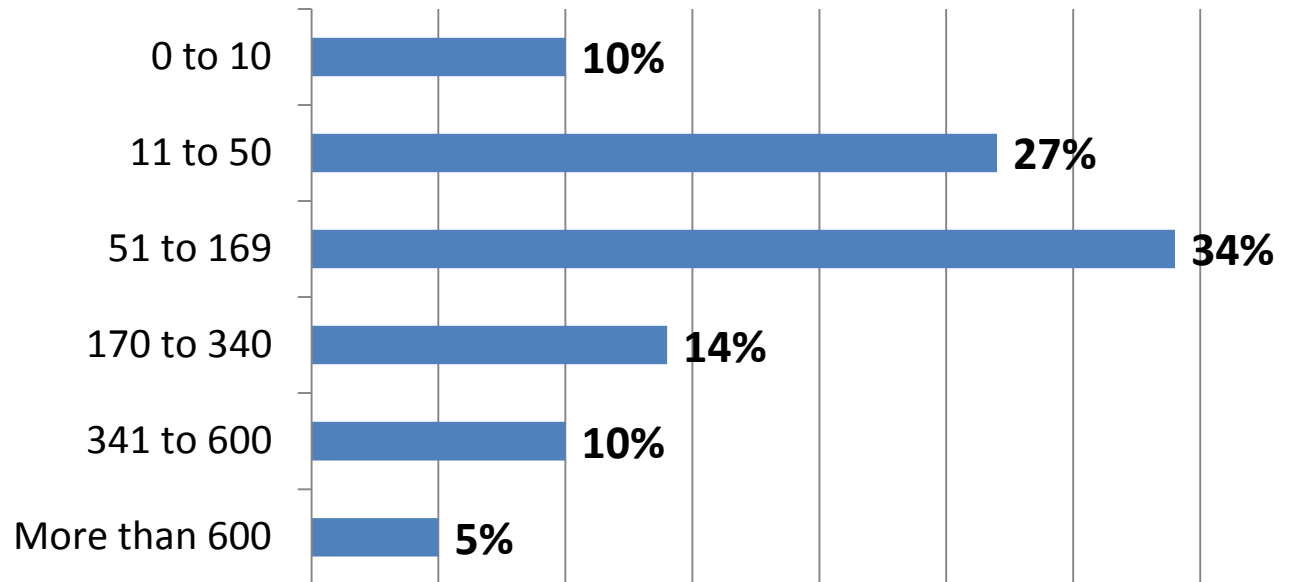
Source: Route (February 2013)

# Audience – a collection of individuals

The “average”  
adult sees  
**169** posters a  
week



# How many posters do we see in a week?



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

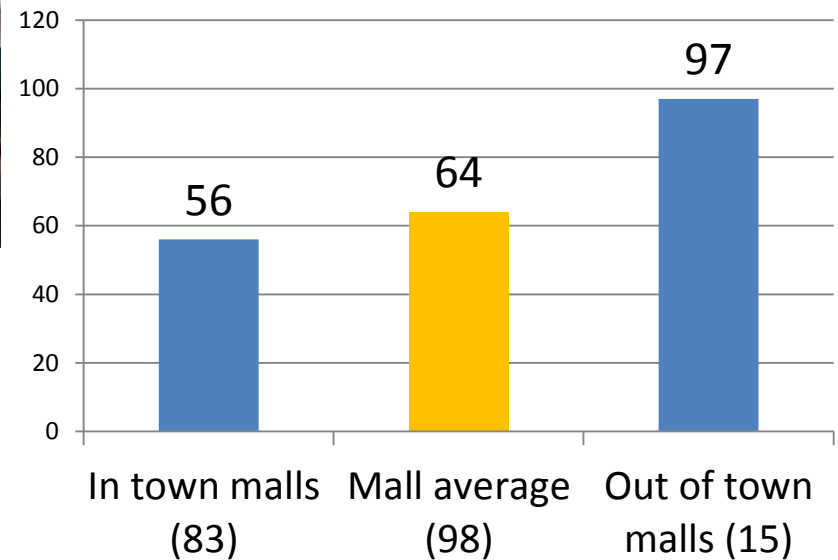


Children	Slow
Youth	Slow
Early middle age	Quick
Late middle age	Quick
Older people	Slow

# Time spent in shopping malls: minutes per visit



Shoppers stay 70% longer  
at out of town malls



# 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

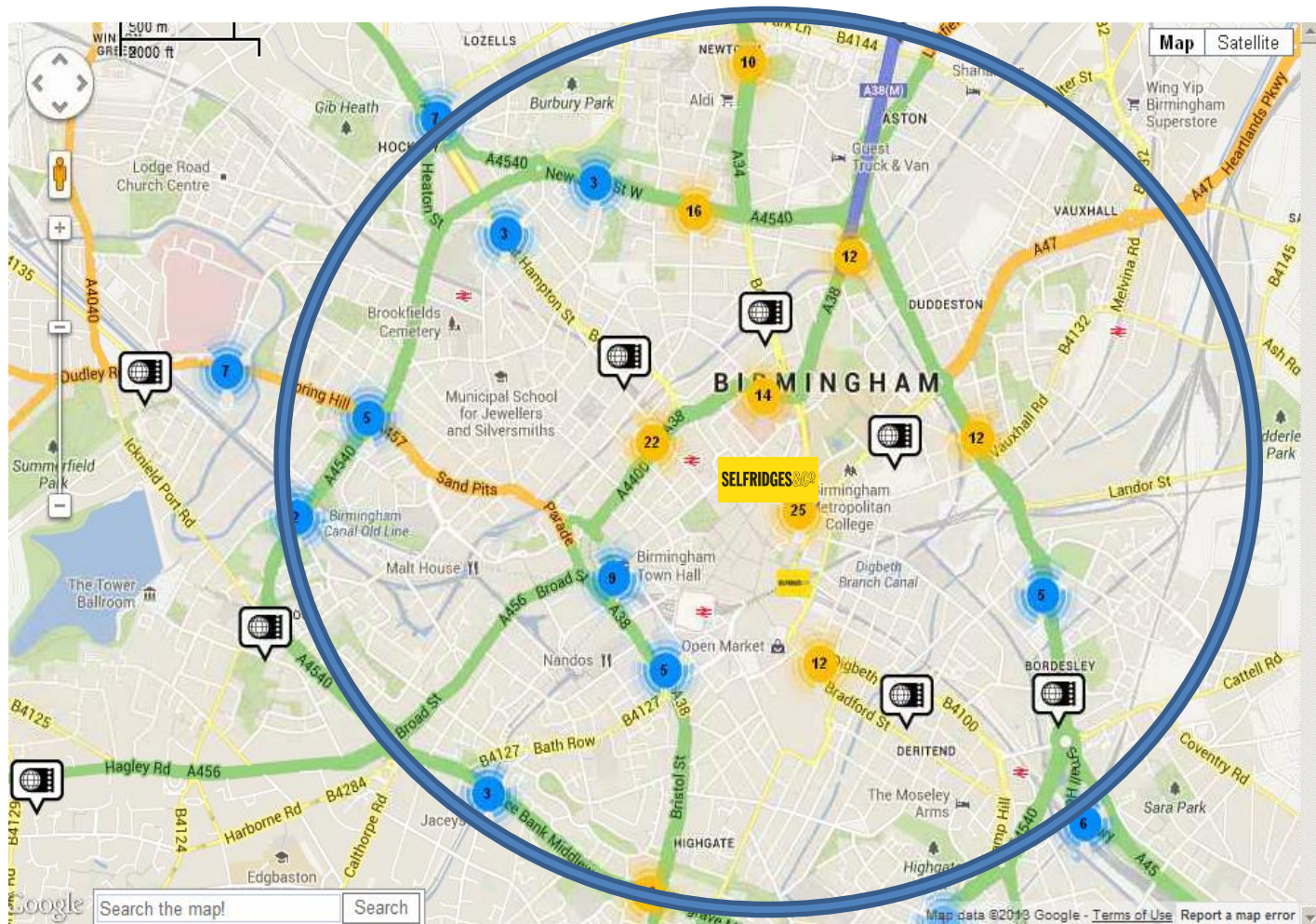
# More precise audience selection



- 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



# Better proximity planning: Birmingham Selfridges Store, 10 miles catchment



# Better proximity planning: 534 roadside frames in the zone, 1.633m ABC1 adults

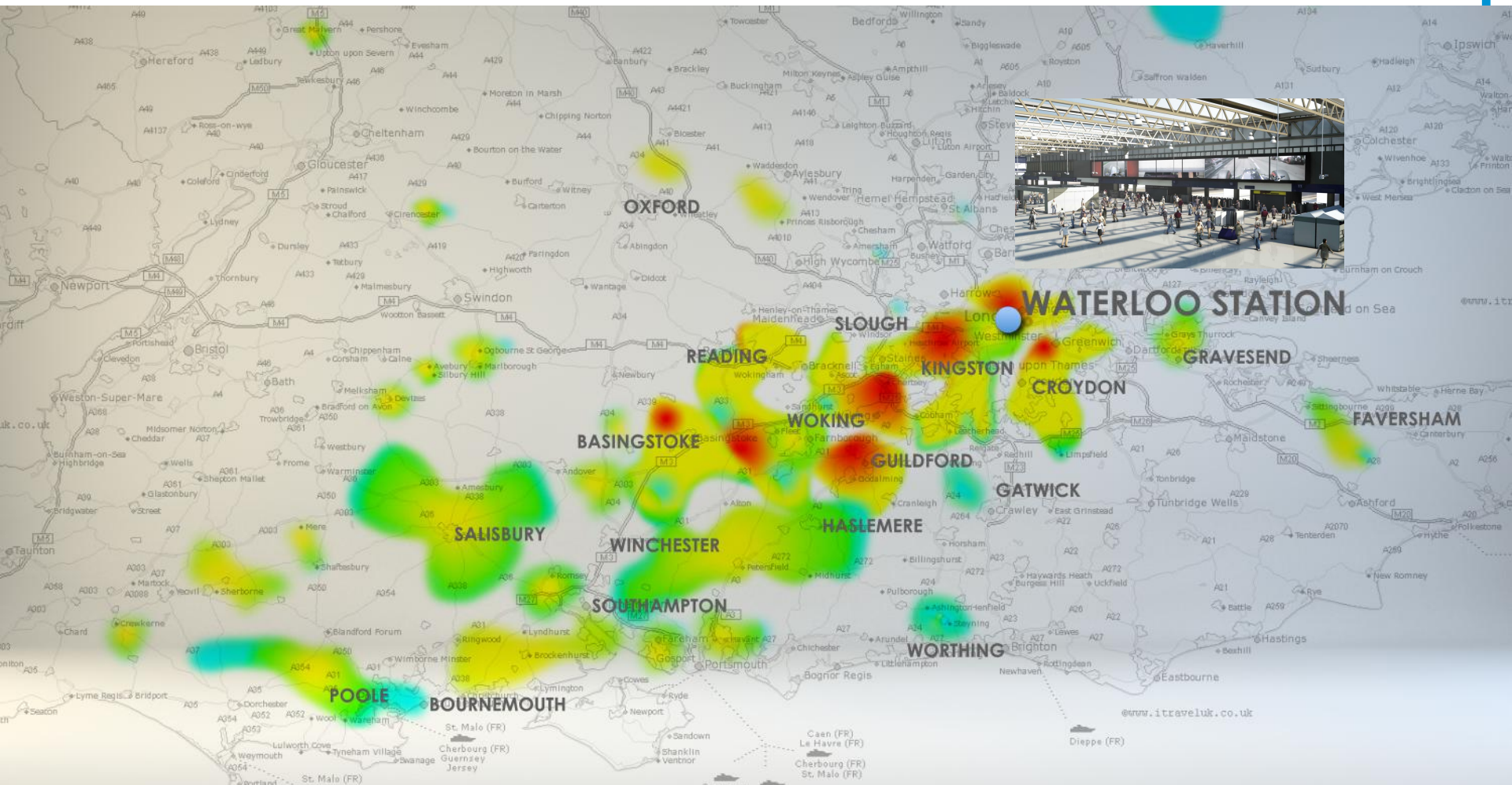




# Waterloo Station: where do they all come from?



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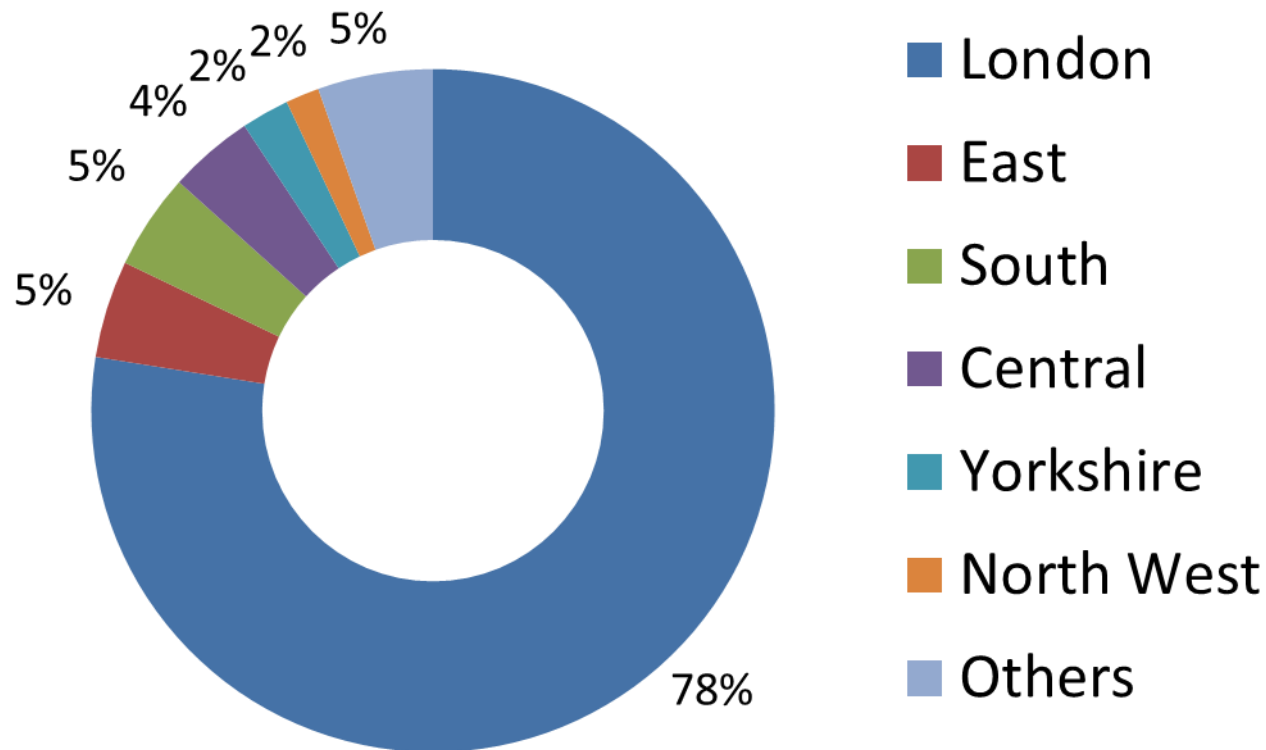




# 4000 Tube car panel campaign, London: 1.3m net adults, but are they all Londoners?



# 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

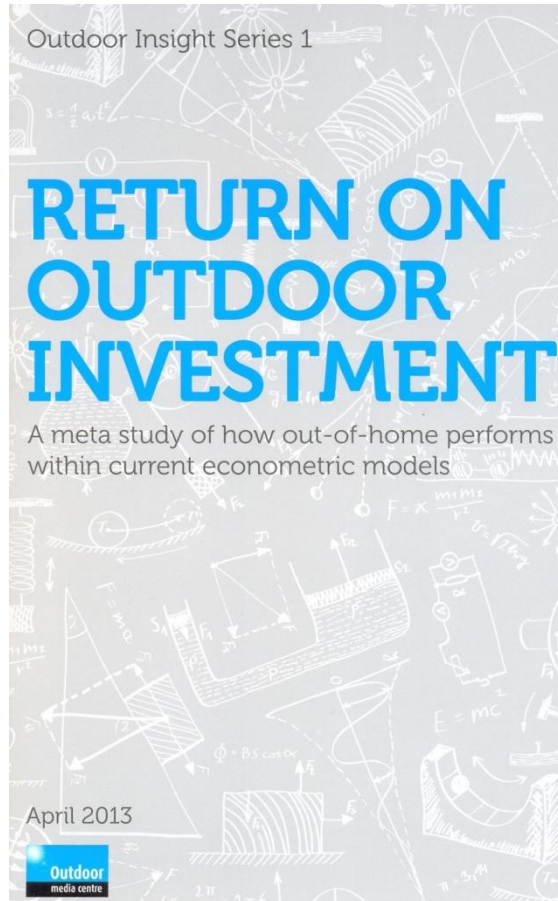


# Missing People initiative



- 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

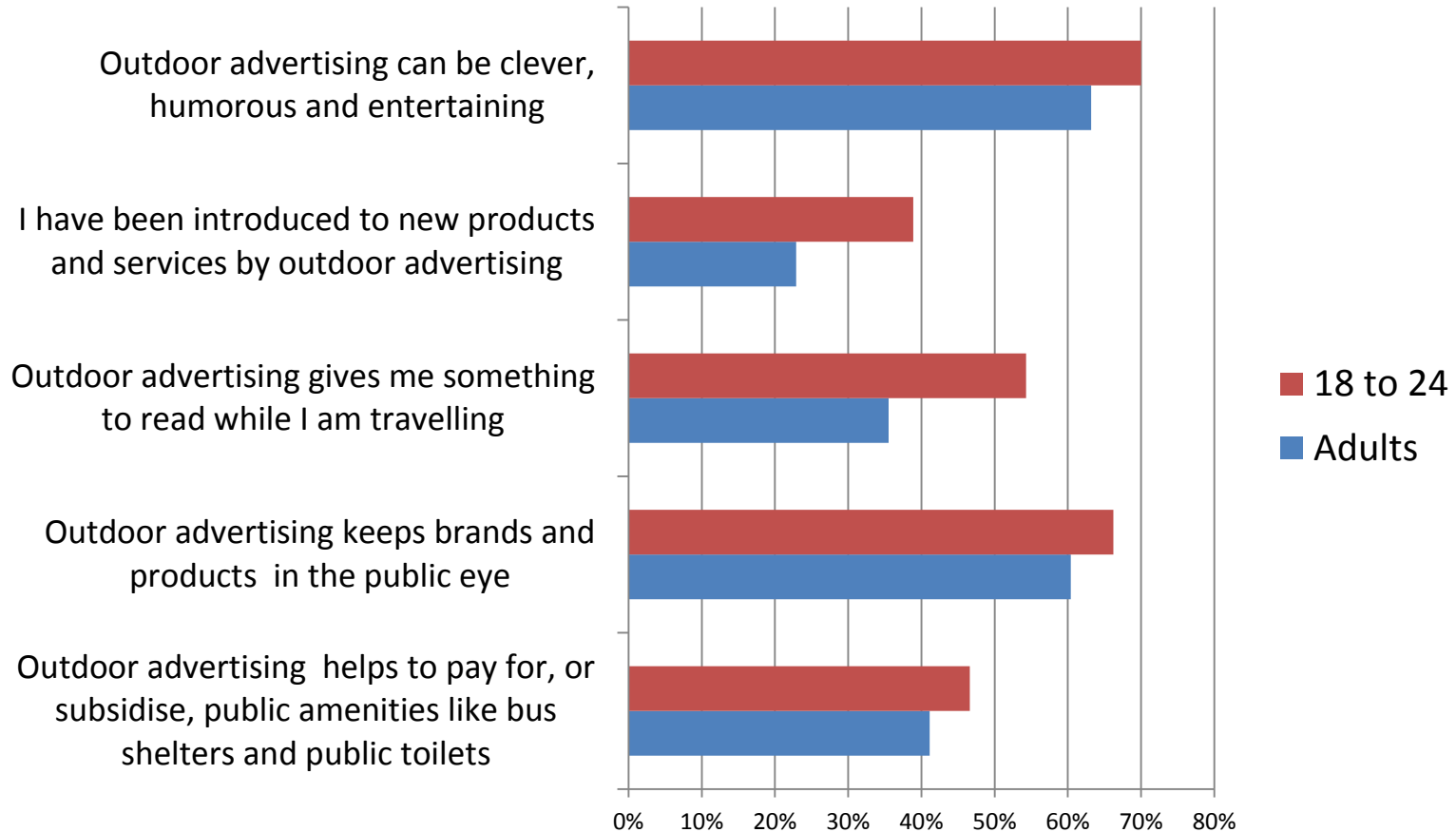
# Focus on accountability: ROI



- 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?”



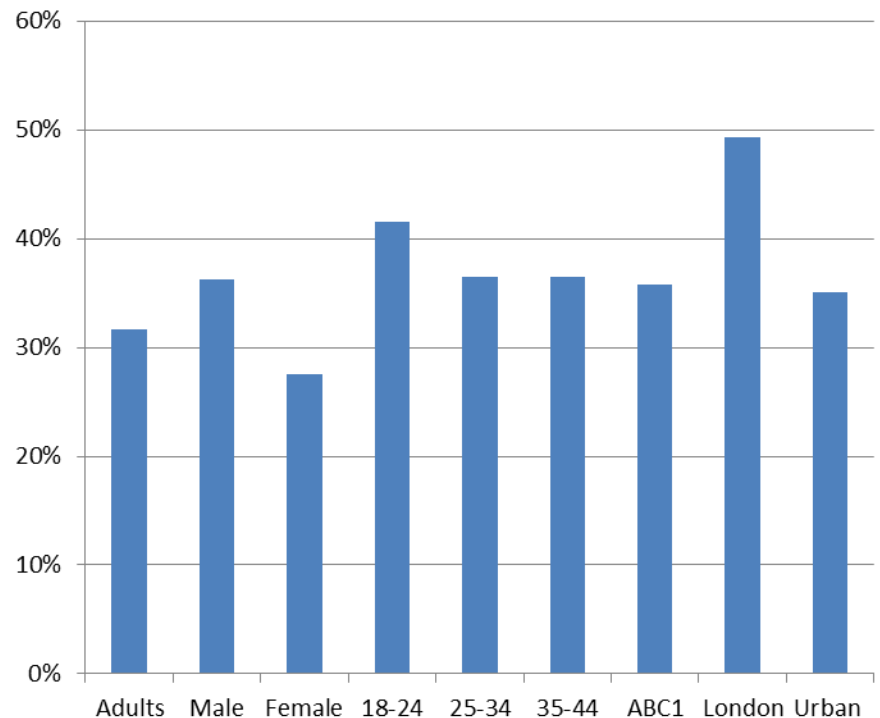
# Travel and holiday destinations campaigns get noticed with outdoor

“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

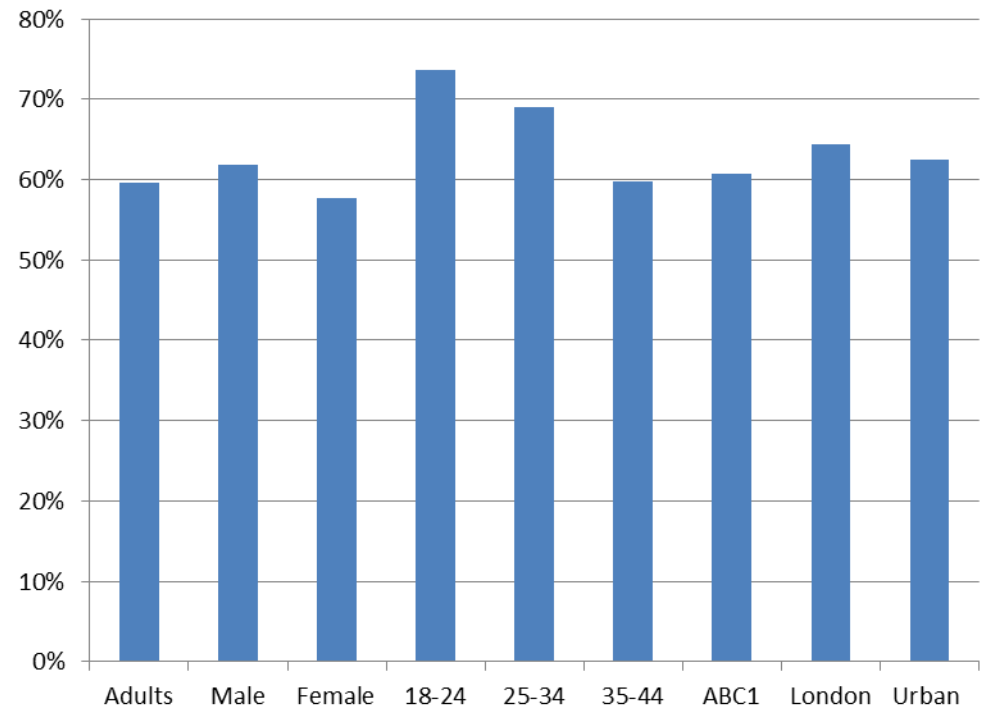
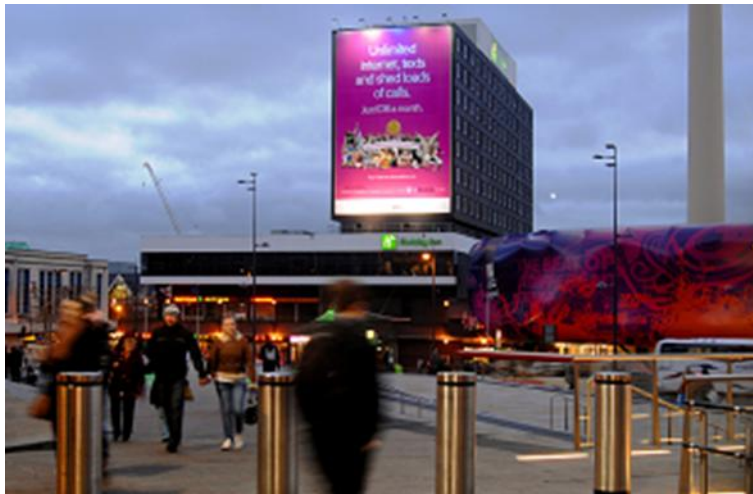
Source: YouGov, August 2012





# Mobile phones and handsets campaigns get noticed with outdoor

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

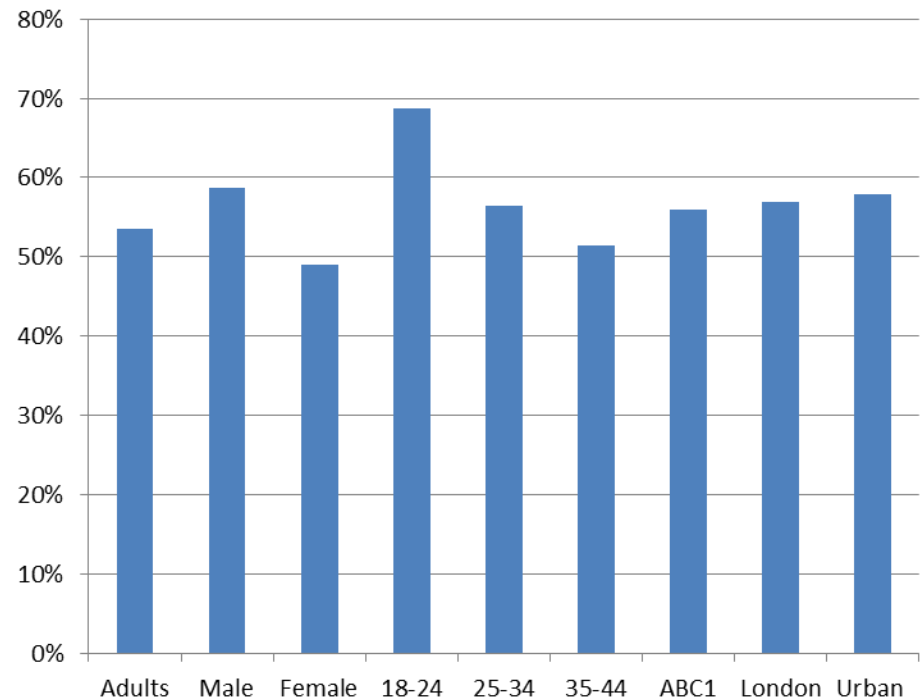


Urban means live, work or study in a large town or city

Source: YouGov, August 2012

# Car brand campaigns get noticed with outdoor

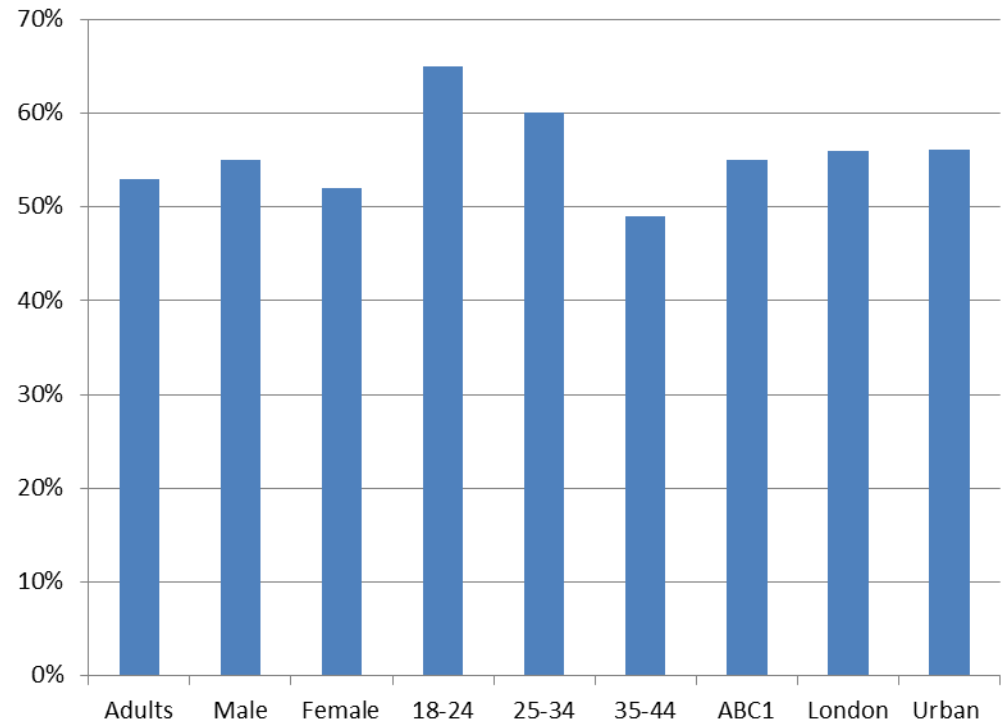
“Have you seen outdoor advertising for car brands recently?”



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

# Retail campaigns get noticed with outdoor

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

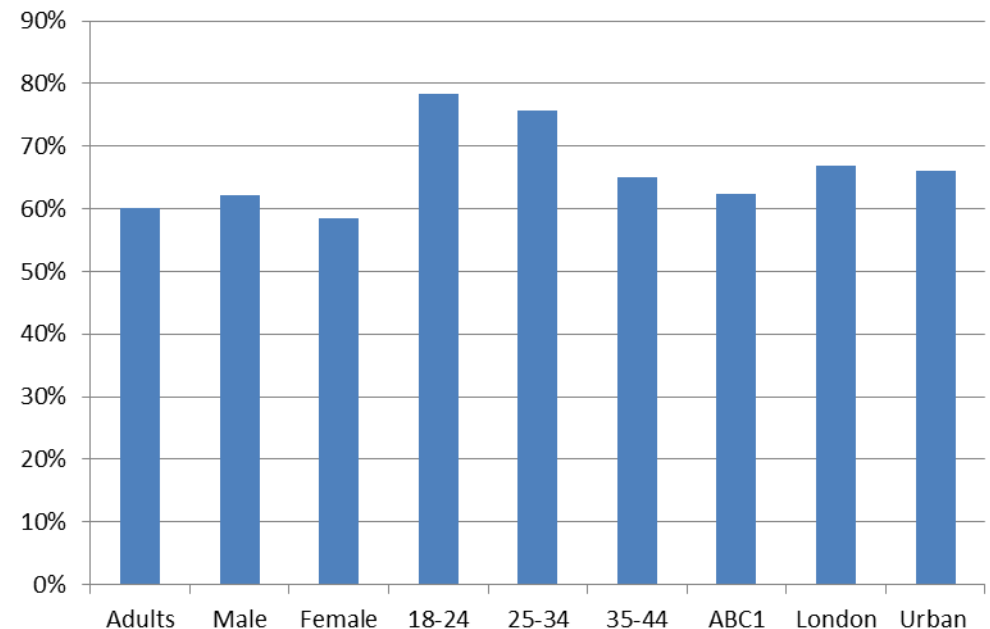


Urban means people who live, work or study in a large town or city

Source: YouGov, August 2012

# Entertainment campaigns get noticed with outdoor

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



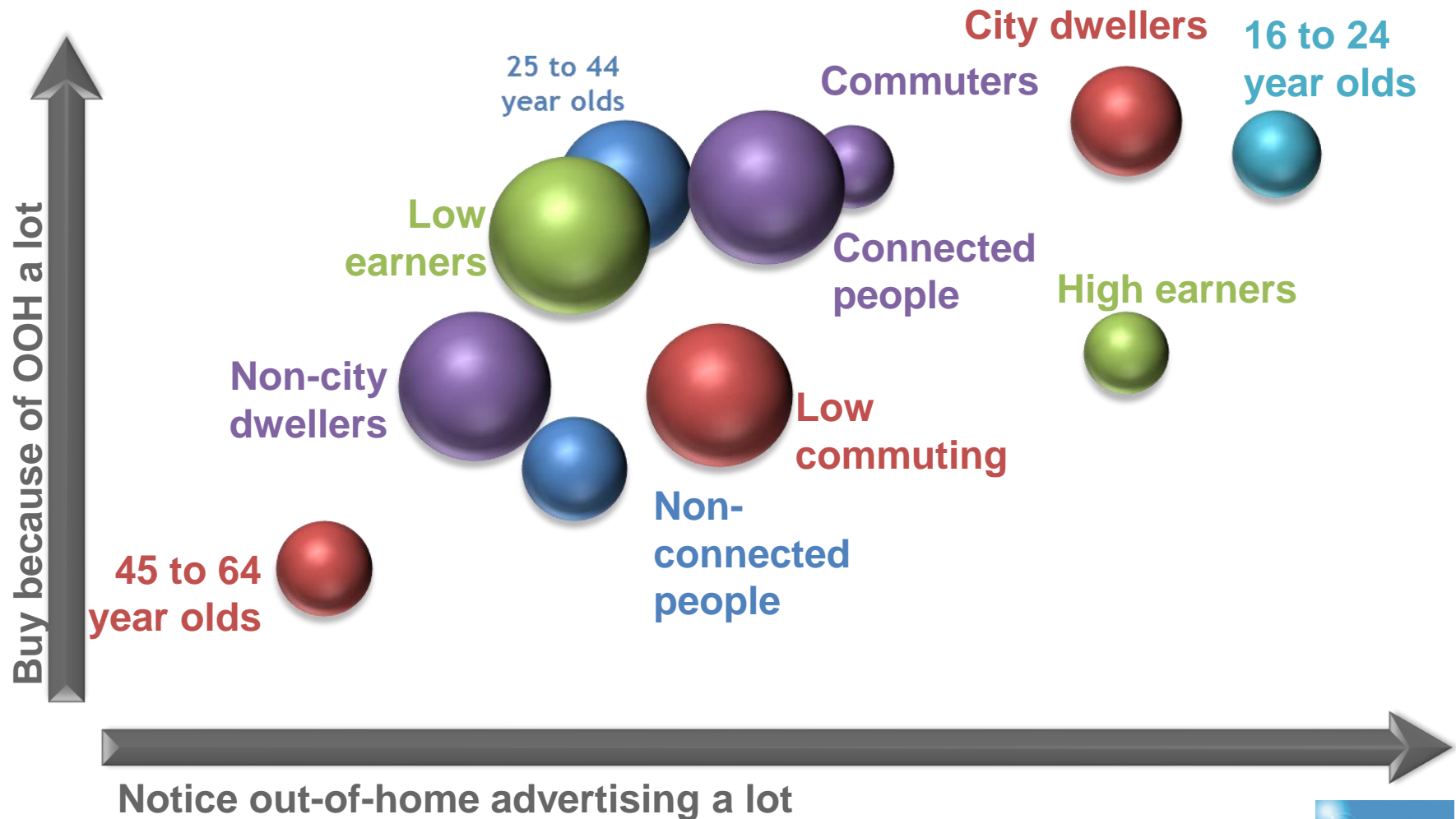
Urban means people who live, work or study in a large town or city

Source: YouGov, August 2012





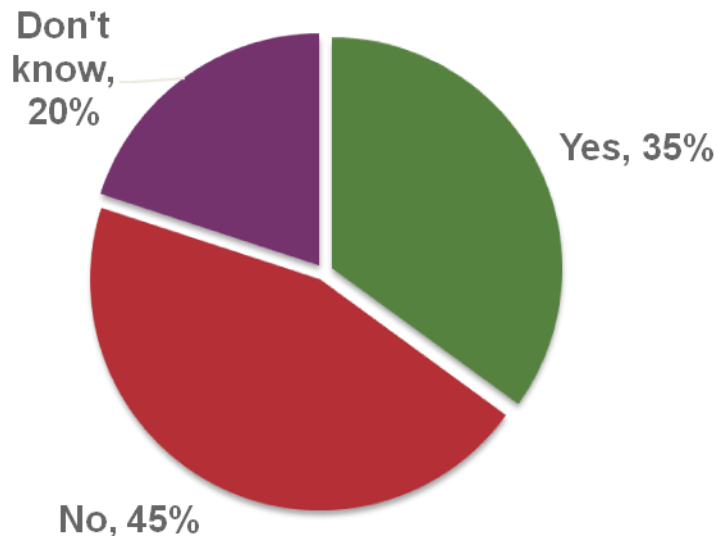
# Outdoor's sweet spot is young, urban, mobile



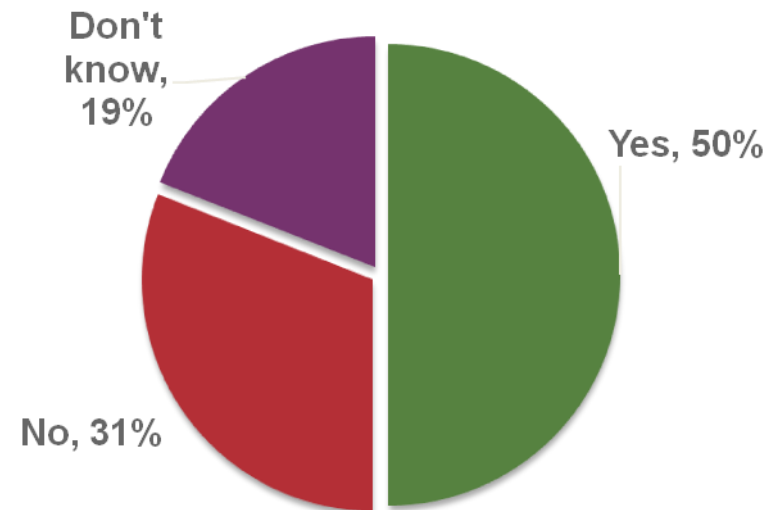
# Half of all people in the market for perfume & fragrances have bought because of OOH

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

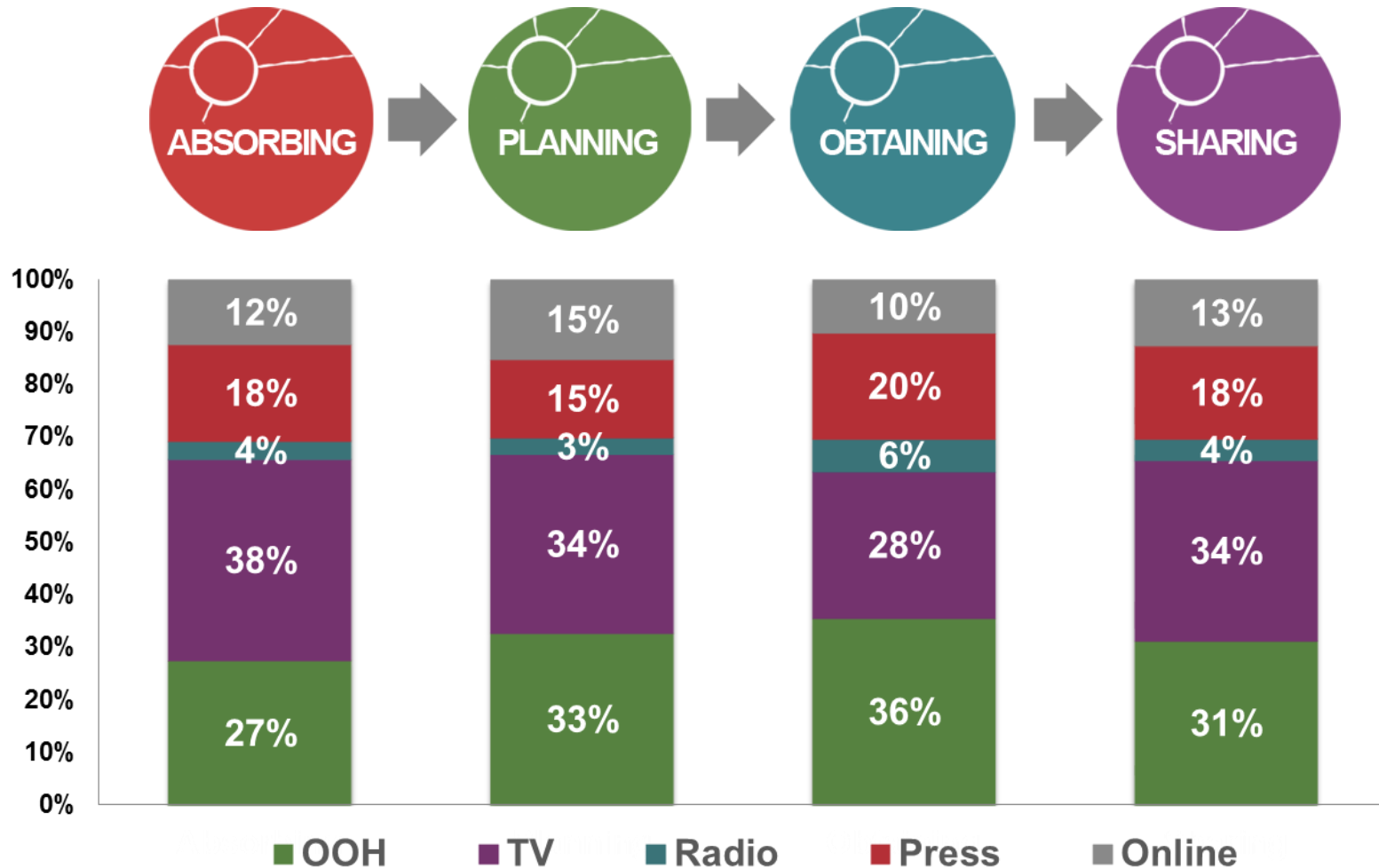
Across all products



People in the market for perfume & fragrances



# OOH's Share of Voice of effective encounters, at each stage, and across all categories



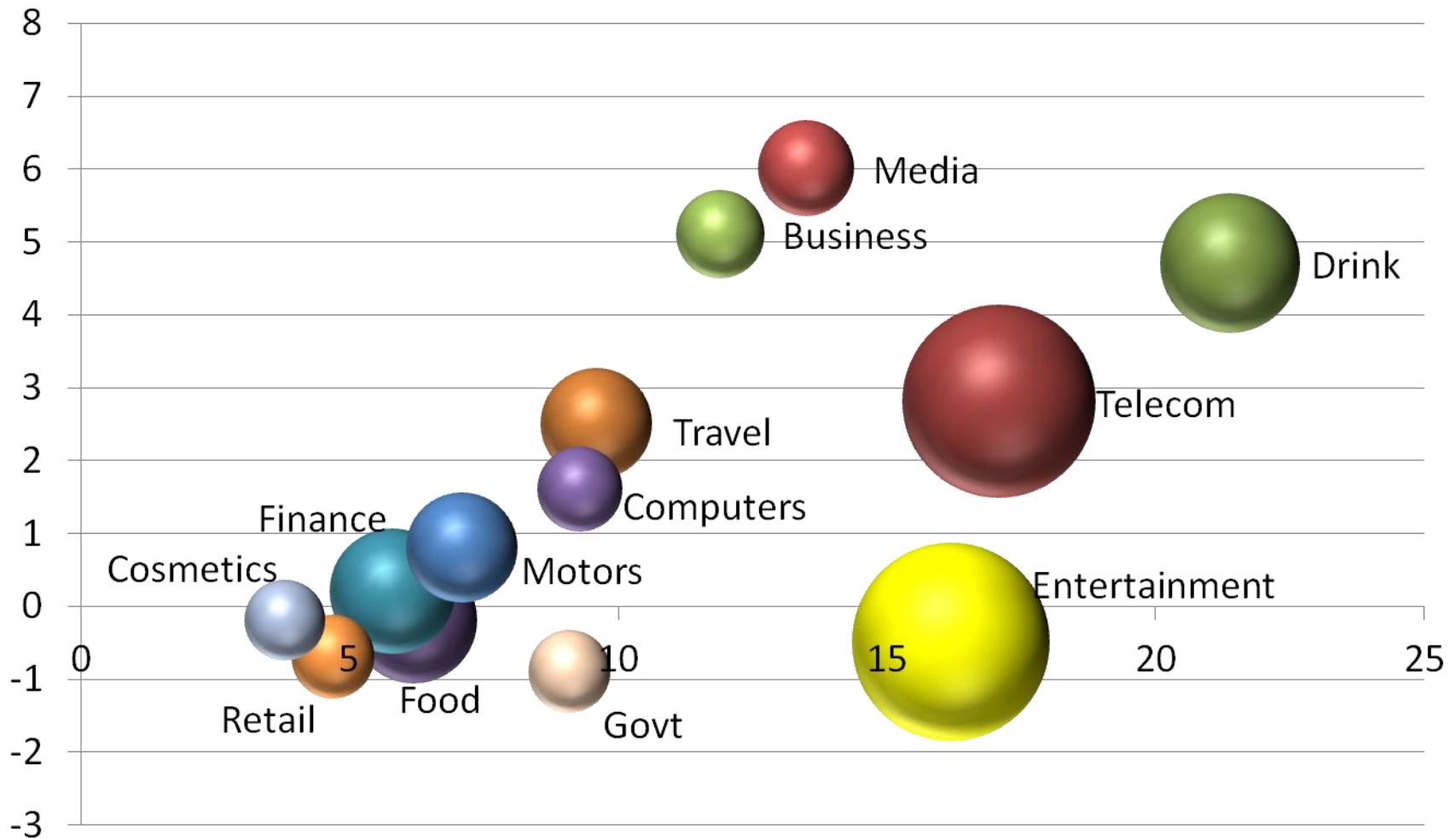


# A word from the street

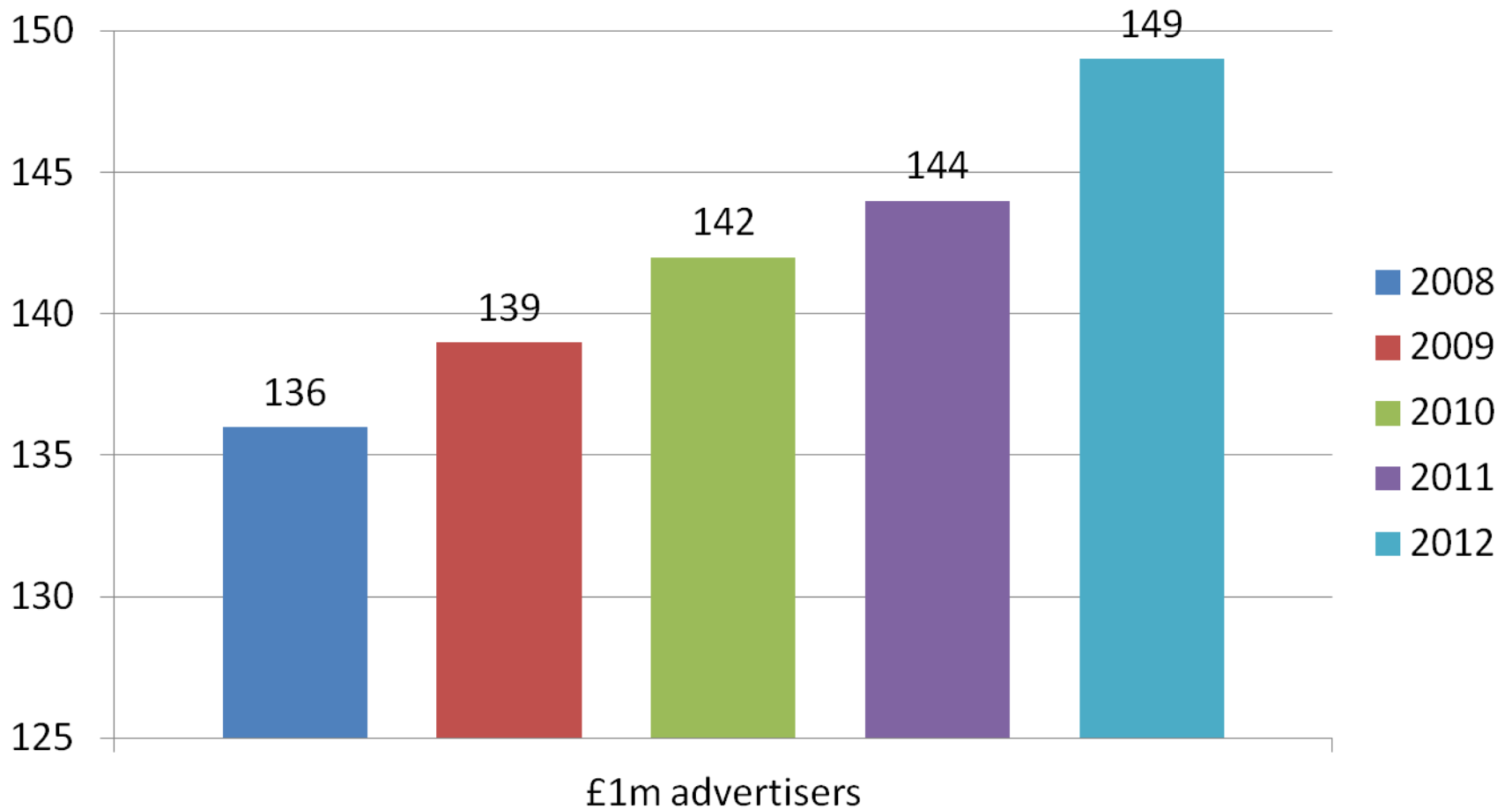


# Outdoor's share by category

## 2012 v 2011



# £ million advertisers in outdoor



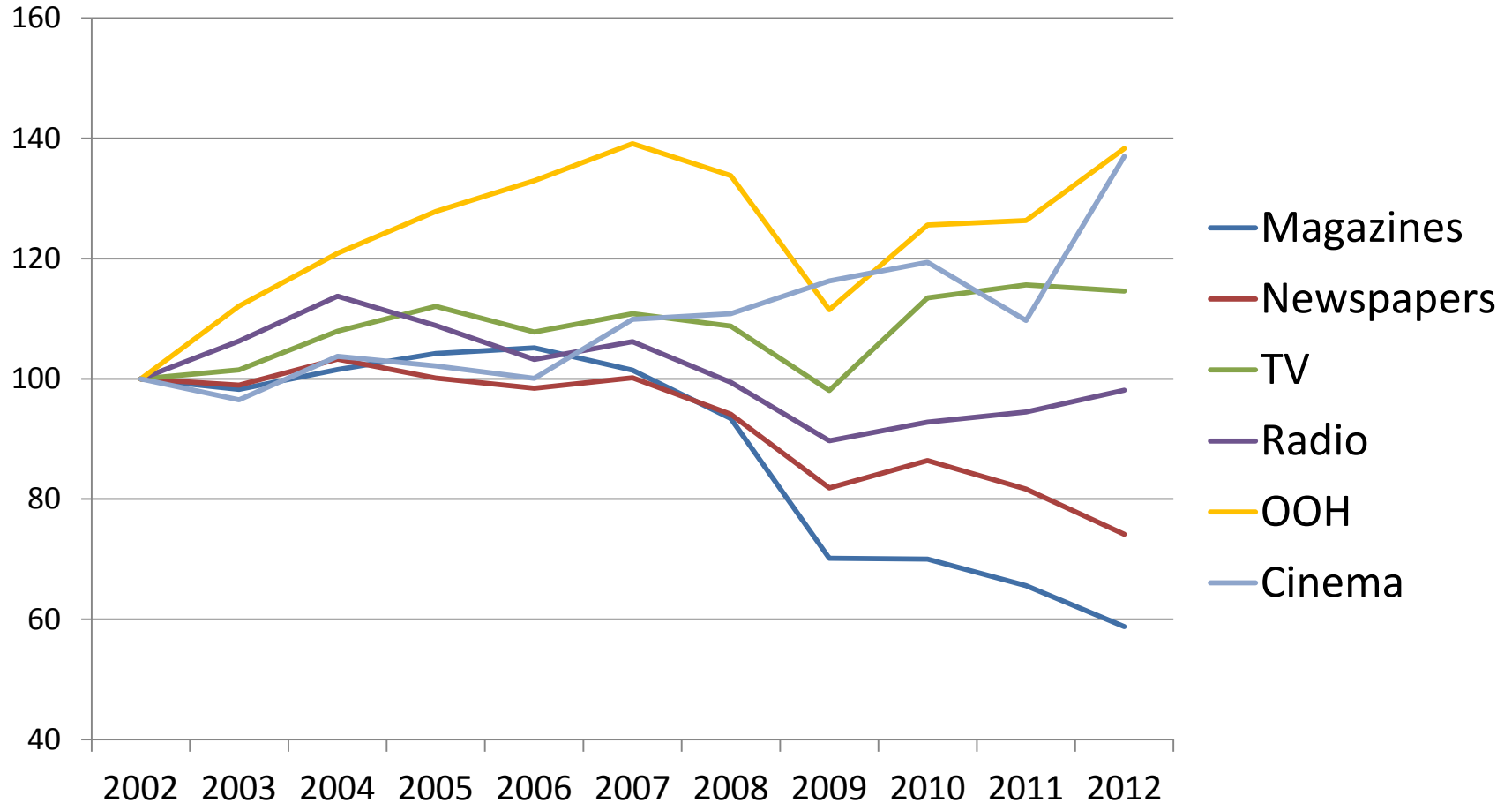
# Steady as she goes: 7 consecutive quarters of growth

- 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%



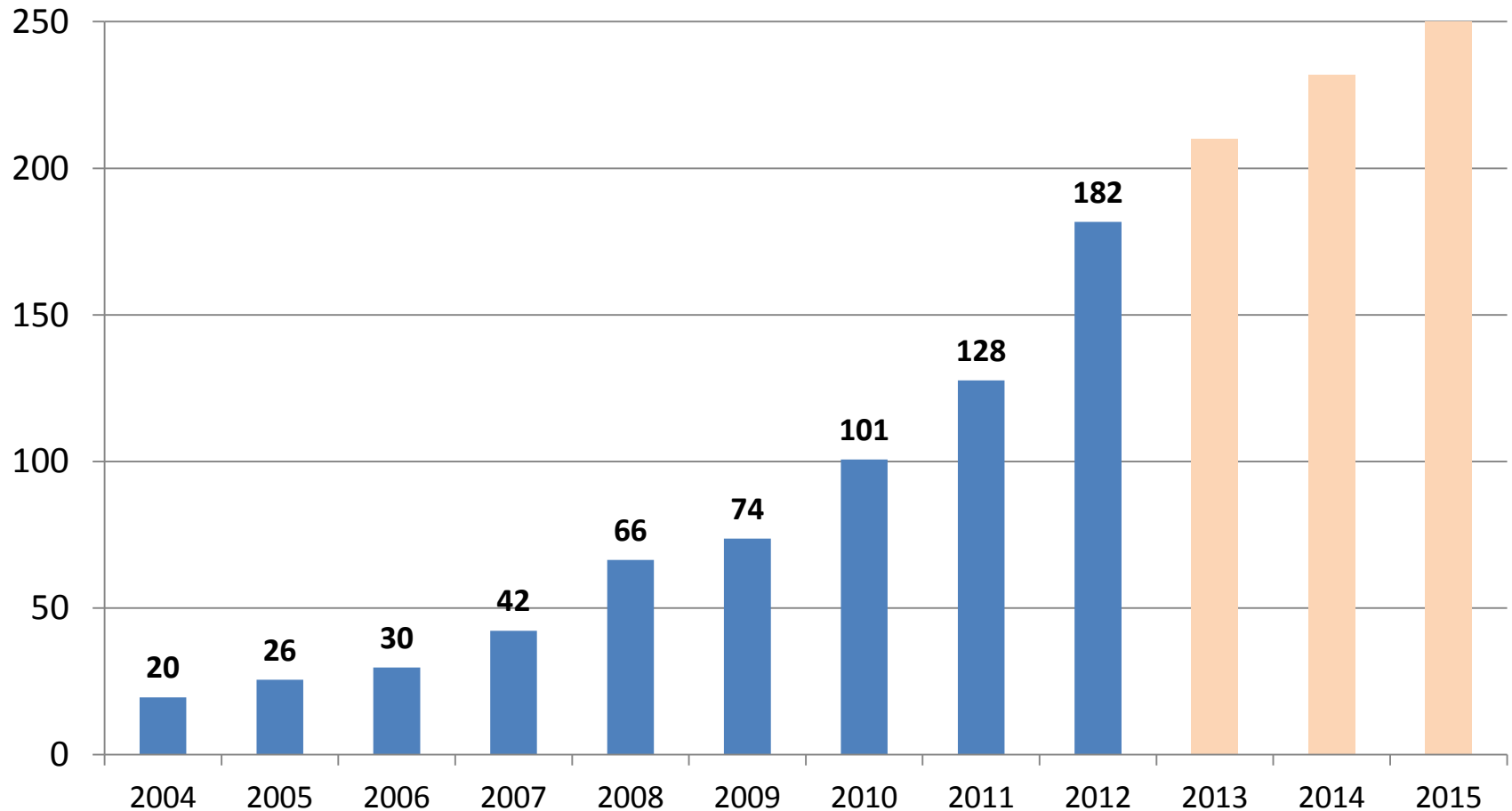
# UK Display media revenue growth

## Indexed over past ten years



# Digital growth: now 20% of UK OOH

£ millions



# Audience engagement

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

**Vielen Dank!**

**Auf Wiedersehen.**