‘Always On: Out of Home Lives 2014’

FEPE Conference, Vienna

5 June 2014

Aims and questions

International

- In a world of increasingly Mobile Living, how is Out of Home influencing people?
- Where does it now sit in the media mix?
- How are the advantages of Out of Home evolving?
- Where do new opportunities lie?

Research & methodology

1. ‘Framing’ trend workshop
2. Quan
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3. Qua

“I don’t like moving ones on the underground as they don’t seem to do anything new or interesting with them ...”

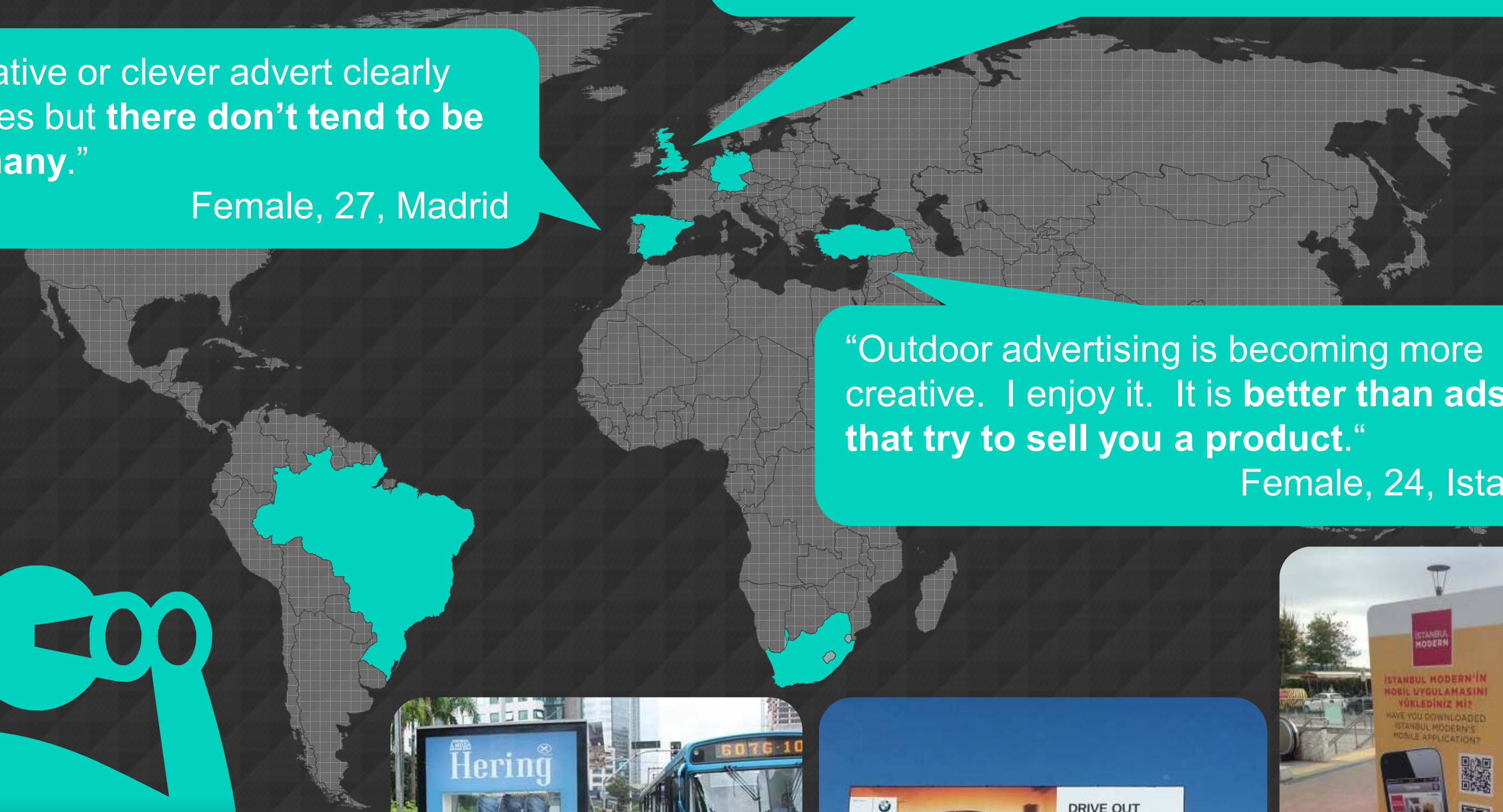
Male, 32, London

“A creative or clever advert clearly engages but **there don’t tend to be that many.**”

Female, 27, Madrid

“Outdoor advertising is becoming more creative. I enjoy it. It is **better than ads that try to sell you a product.**“

Female, 24, Istanbul



Mobile Living: still room to cut through?

81%

Own smartphones

49%

Own tablets

71%

Use tablets on the go

Source: FEPE/Future Foundation | Base: 1,000 online respondents per country aged 18-64, 2014

Key themes

1	Tuned in = tuned out?
2	Impact with outcomes
3	Cult of Creativity
4	Future value: consumer view

1. Tuned in = tuned out?

An audience free from distraction

60%

Do ‘nearly nothing’ or just listen to music / audio books during commute

“Looking at bus stops, metro doors or billboards **bides the time** whilst you wait for public transport or **entertains you** as you walk along the street.”

Female, 27, Madrid

“ ... **I can be listening to music and still looking at and reading an advertisement**.”

Female, 33, London

Source: FEPE/Future Foundation | Base: 1,000 online respondents per country aged 18-64, 2014
Source: FEPE/Future Foundation | Qualitative research 2014

Contemporary commuting: profiles

Nearly Nothing : 40%

More likely to be male, over 45 and work full time, they enjoy low-stress commuting (ave 1.4 activities).

Comparatively less social but still like to shop.

Germany – 48%

Musical Observers : 20%

Enjoy travel around town the most; tuned in but also soaking up surroundings (ave. 3.9 activities).

Low key socialising and downtime appeals.
Not keen shoppers.

South Africa – 32%
Brazil – 24%

Readers: 13%

More likely to be female, over 45; and reticent about smart devices. Reading absorbs travel time (ave. 3.6 activities).

Enjoy cultural pursuits alongside shopping.

Spain – 21%

Source: FEPE/Future Foundation | Base: 1,000 online respondents per country aged 18-64, 2014

Contemporary commuting: profiles

Hyper Individuals : 14%

Young, ultra sociable, manic multi-tasking!

Urban journeys filled with smart device activities: social networking, gaming, texting (ave. 7.9 activities). But also alert to surroundings and advertising.

Turkey – 23%

Communicators: 13%

Young busy extroverts too, but a *little* older, wealthier, calmer than Hyper Individuals.

Journeys are for catching up with family / friends – calling, texting, emailing (ave. of 5.3 activities) – while still engaged with surroundings.

South Africa – 19%

Source: FEPE/Future Foundation | Base: 1,000 online respondents per country aged 18-64, 2014

A balance of ‘stimuli’ required for contradictory consumers

“I hate being bored”

64%

Majority of all commuter profiles

“Sometimes I feel the need to get away from phone calls / emails / text messages and switch off”

53%

Majority of all commuter profiles except ‘Nearly Nothing’

Source: FEPE/Future Foundation | Base: 1,000 online respondents per country aged 18-64, 2014

2. Impact with outcomes

% who have discussed

Billboard : 40%
Digital: 36%

Source: FEPE/Future Foundation | Base: 1,000 online respondents per country aged 18-64, 2014

Optimum media mix?

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“I saw it a long time ago but I still remember it. It was all over town. Really funny.”

Female, 25, Hamburg

Most **memorable** advertising

TV – 46%

Out of Home – 34%

Print – 7%

Online – 4%

Most **trustworthy** advertising

TV – 28%

Out of Home – 24%

Print – 22%

Online – 3%

Source: FEPE/Future Foundation | Base: 1,000 online respondents per country aged 18-64, 2014

Complementing and amplifying TV

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Last car purchase

Among those who saw relevant TV ad

47%

saw relevant Out of Home ad

Last grocery purchase

Among those who saw relevant TV ad

42%

saw relevant Out of Home ad

"I saw it [NSPCC advert] about 18 months ago on a billboard ...

"The TV campaign was excellent and this advert managed to capture the essence of this campaign reinforcing the strength of the campaign; it was subtle but effective."

Female, 56, Birmingham

Source: FEPE/Future Foundation | Base: 1,000 online respondents per country aged 18-64, 2014
Source: FEPE/Future Foundation | Qualitative research 2014

Reassuring, reinforcing, reminding cautious consumers

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"I shop around extensively for the best deals"

67%

"I regularly use platforms such as Twitter or Facebook to **solicit crowd-sourced opinions with regards to shopping decisions**."
Female, 28, Johannesburg

"It [Turkcell advert] covers the entire outer area of a building. **I am a customer of Turkcell and I feel confident about my GSM operator (network), Turkcell, when I see this colourful and big advertisement.**"
Female, 50, Istanbul

"I like it when I see adverts for products I already own"

52%

Source: nVision Research | Base: 1,000-5,000 online respondents per country aged 16-64, 2014
Source: FEPE/Future Foundation | Base: 1,000 online respondents per country aged 18-64, 2014
Source: FEPE/Future Foundation | Qualitative research, 2014

3. Cult of Creativity

Creativity has growing status; consumers want more from OOH

FEPE International

"Some [OOH] adverts are entertaining but most are plain / boring ... **Advertising needs to be a bit more creative."**

Male, 29, Hamburg

"The standard billboards that remain flat, boring or non-engaging **will receive less and less attention each day."**

Female, 28, Johannesburg

73%

Feel the need "To fulfil myself as an individual by being more creative"

Source: FEPE/Future Foundation | Qualitative research, 2014

Source: nVision Research | Base: 1,000-5,000 online respondents per country aged 16-64 (excludes South Africa), 2013

Creativity, humour: increasingly key for engagement

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68%

“I like it when companies create amusing or entertaining content”

Communicators

82%

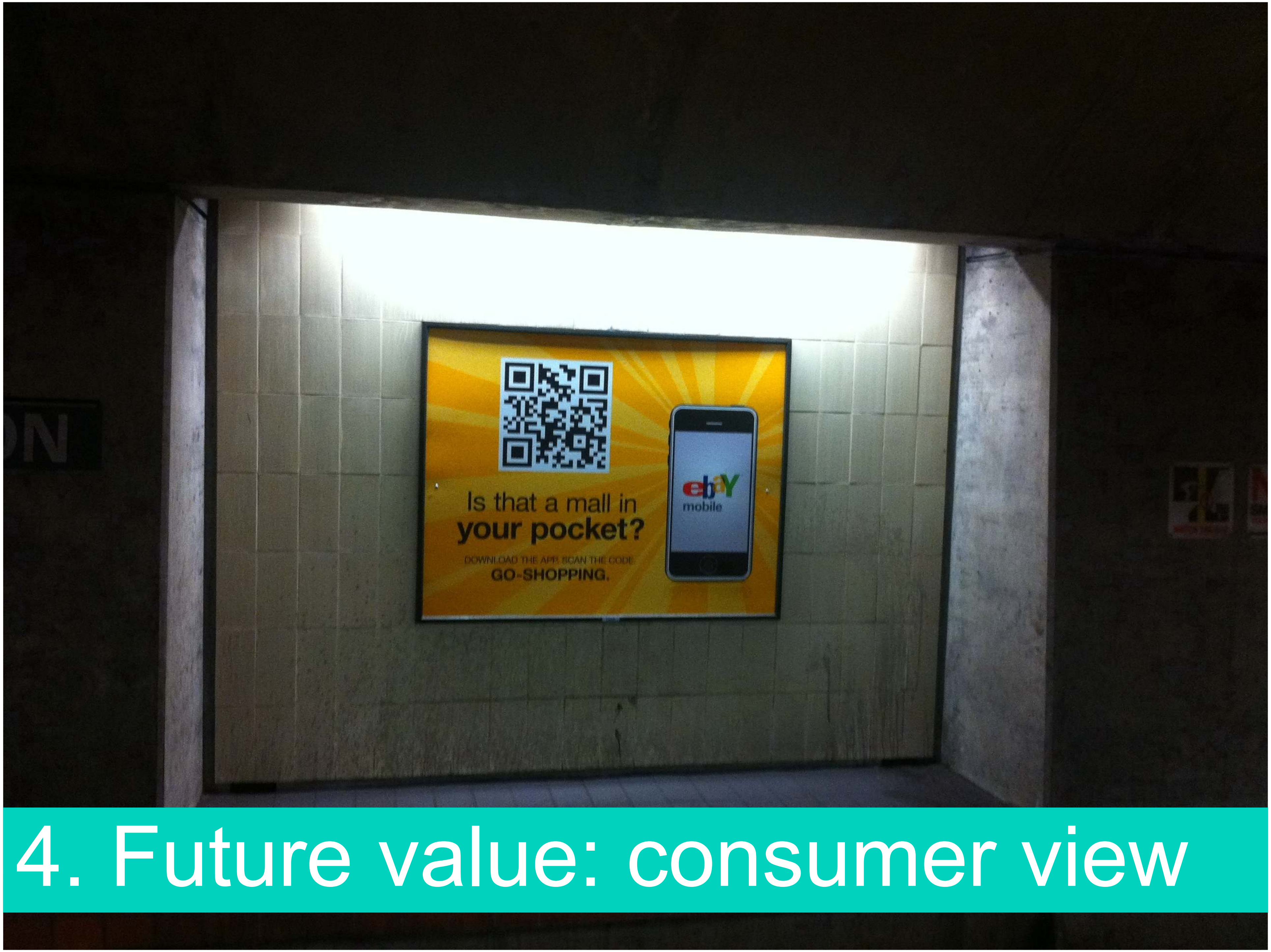
Hyper Individuals

80%

“Outdoor advertising is becoming more creative. I enjoy it. It is **better than ads that try to sell you a product. There is no fun in that.**“

Female, 24, Istanbul

Source: FEPE/Future Foundation | Base: 1,000 online respondents per country aged 18-64, 2014



4. Future value: consumer view

Digital value vs digital invasion: local context

Interested in outdoor digital ad showing **information relevant to specific time / my location**

62%

Higher income: higher appeal

Interested in advertising **tailored to my personal interests**

46%

"I think the strength of outdoor advertising is that **it can be localized**".

Female, 21, Rio

Source: FEPE/Future Foundation | Base: 1,000 online respondents per country aged 18-64, 2014

Source: FEPE/Future Foundation | Qualitative research, 2014

"Make it worth my while"

In future, would be interested in outdoor digital adverts / services which

Enabled me to get **money off vouchers** by tapping/ scanning it with my mobile phone

63%

Offered me the opportunity to **win a prize** by interacting with it

56%

Source: FEPE/Future Foundation | Base: 1,000 online respondents per country aged 18-64, 2014

Extending appeal

Among those who have not yet acted on an Out of Home advert

40%

would be interested in tapping/scanning their mobile on a digital outdoor advert for money off vouchers.

In summary

1	Mobile Living is providing impetus not impediment to Out of Home: content hungry consumers with ‘portals’ in their hands.
2	‘Traditional formats’ and *combining* traditional formats remains critical, alongside integration of digital / new technologies.
3	New shopper landscape strengthens Out of Home’s role: impact at key stages of purchasing cycle dominated by research and need for reassurance.
4	Collectively, industry must act to continue enhancing creativity and quality of execution for impactful ‘story telling’.
5	Out of Home’s advantage of localisation is gaining new relevance; but more interaction has to be ‘worth it’ for consumers.

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