

INTRODUCING

THE 4TH SPACE FOR VIDEO ADVERTISING

By *Talon*



THE MEDIA LANDSCAPE CONTINUES TO EVOLVE

WIDER LANDSCAPE



Media fragmentation
makes omni-channel
planning difficult

OUT OF HOME



Increased digitisation
across the OOH
industry

OUR MANIFESTO



Smarter as Standard

Opportunity to create
more effective
campaigns

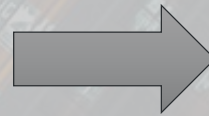
THE UK VIDEO MARKET IN H1 THIS YEAR WAS WORTH £1.3BN

The UK video market grew by **27%** in H1 and continues to be the fastest-growing digital ad format



Video consumption and content is changing

Long form, lean forward,
storytelling content



Short form, skippable, on
demand, across device,

THE 4TH SPACE FOR VIDEO ADVERTISING

BUT THERE WAS A CLEAR BARRIER TO MAKING THIS WORK

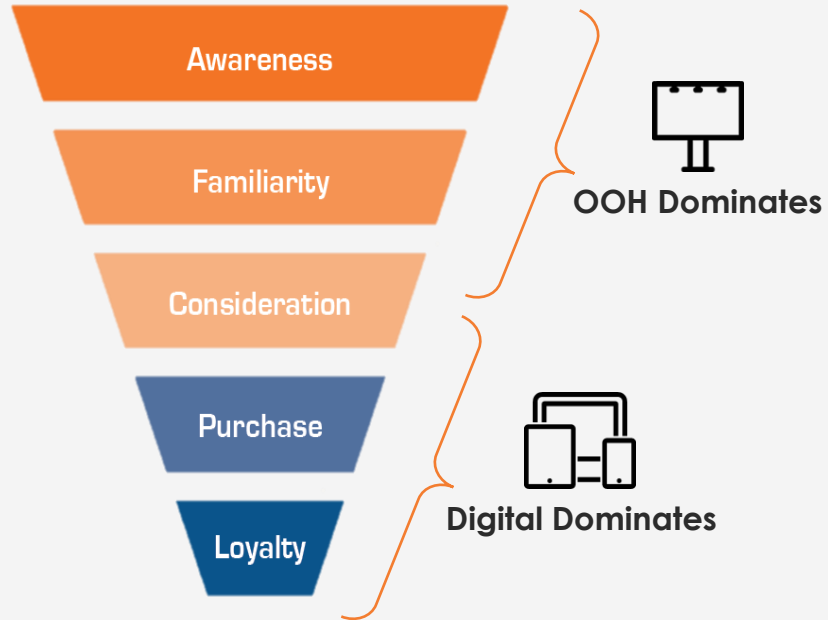
Is there any proof that OOH and social media are complimentary media channels?

SMARTER AS STANDARD



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OUR HYPOTHESIS WAS THAT THESE TWO CHANNELS WORKING TOGETHER WOULD BE MORE POWERFUL FOR ADVERTISERS



The channel combination allows for influence throughout the decision funnel

campaign

Full-motion outdoor ads deliver the emotional punch of TV

Ocean's research reveals full-motion digital out-of-home's impact as an ad medium

Ocean

2.5 x greater impact

2 x more likely to be seen

DOOH has a stronger priming effect on mobile and digital advertising than TV

Source: Ocean Neuroscience & Talon Campaign Benchmarks 2018

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WE HAD TO UNDERTAKE OUR OWN MEASUREMENT STUDY TO PROVE IT

OBJECTIVE

quantify the additional impact of including Full Motion DOOH alongside social media



Awareness
Recall



Interest
Consideration/Intent



Action
Store visit/purchase

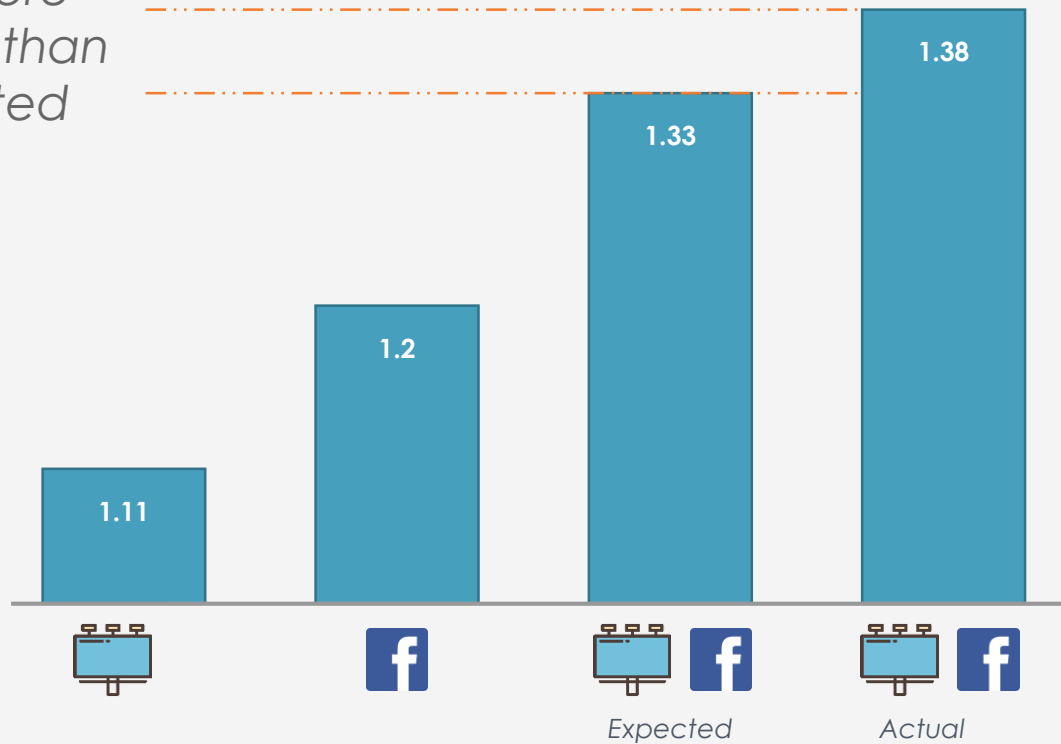
| LIMITEDSPACE |

O|O
OCEAN

 Clear Channel

 **ondevice**
research

13% more efficient than expected



Uplift factor in likelihood to purchase

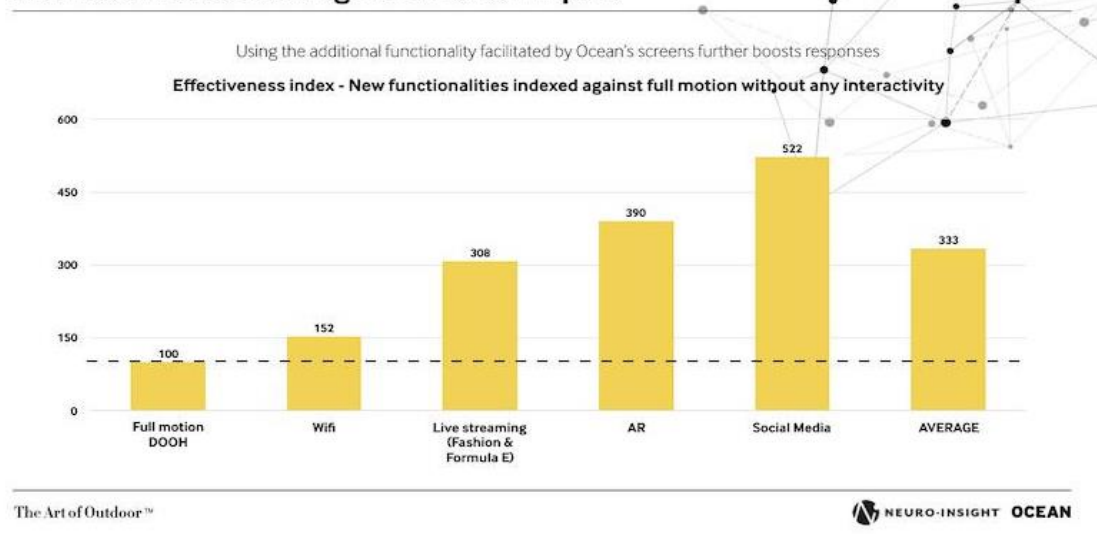
THIS YEAR, FACEBOOK THEMSELVES HAVE CORROBORATED OUR RESULTS

With both Facebook and OOH channels included in the media mix, all intended audiences were reached, driving 6% of incremental sales, far beyond the benchmark

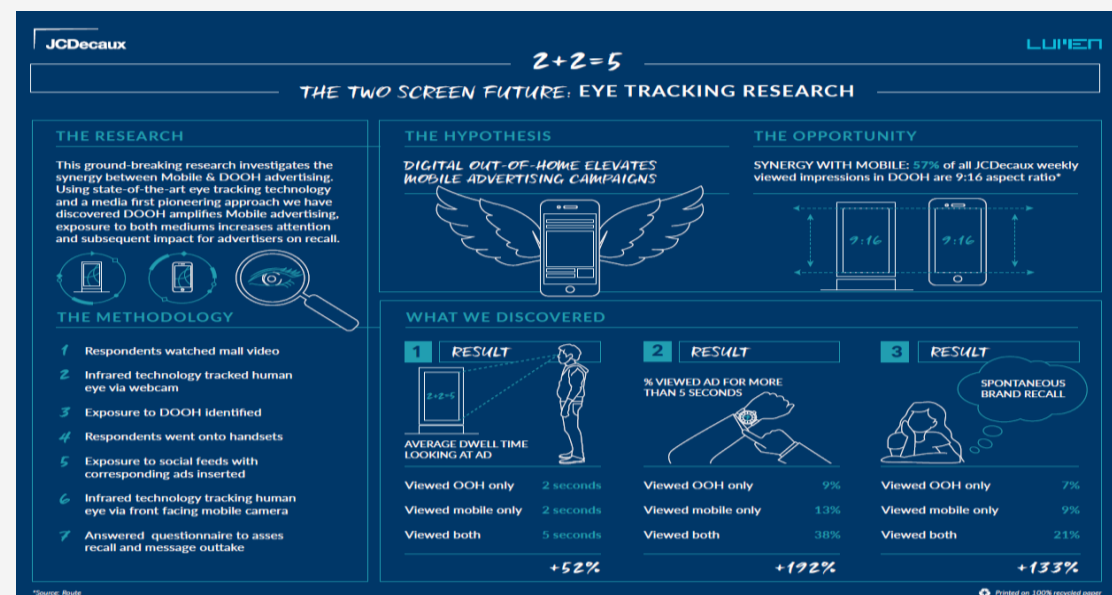
Source: Facebook IQ Aug 2019

MEDIA OWNERS HAVE FOLLOWED SUIT AND THEIR RESEARCH HAS VERIFIED FINDINGS

Interaction adds a strong incremental impact



Ocean continued their Neuroscience research by adding that social media interaction with full motion content drove a **5 times higher impact**



*Source: Route

Printed on 100% recycled paper

JCDecaux looked at 'The two screen future' demonstrating that exposure to video on OOH and online increased engagement by **+52%**.

Source: JCDecaux and Ocean Neuroscience

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RESULTS

RESEARCH METHODOLOGY



OUR RESEARCH PARTNERS

- Location research specialists
- Sophisticated cross platform measurement
- Vast experience across the media industry



BRAND IMPACT

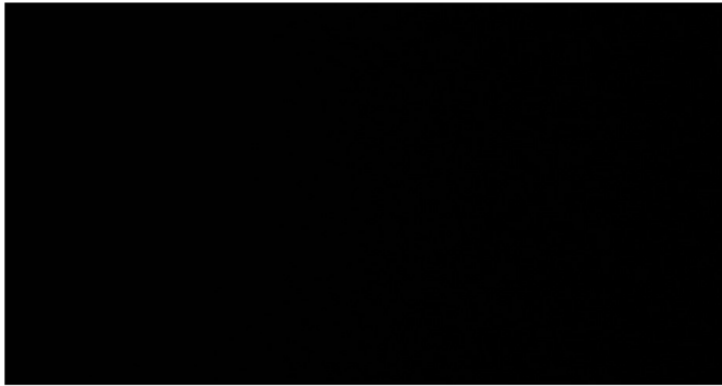
- Online quantitative survey
 - 3 sample groups
- Measurement of brand, creative and media metrics



STORE EFFECT

- Collection of location history data
- Tracks consumer behaviour and store visitation
- Focused on those exposed to full motion DOOH

THE CAMPAIGNS BEING RESEARCHED



SEIZE THE HOLIDAY 

Objective: Awareness & Footfall

Formats: Underground, Mall

Dates: Weekends in April/May

Other media live: None



Objective: Awareness

Formats: Transport, Roadside, Leisure

Dates: June/July

Other media live: Press & TV*



Objective: Footfall

Formats: Mall

Dates: Weekends in July/Aug

Other media live: None

* Different copy

By adding FMDOOH to a social video plan, effectiveness across the brand funnel increased on average by **23%**.

	OOH EXPOSURE	SOCIAL EXPOSURE	SOCIAL & FMDOOH EXPOSURE	% SHIFT SOCIAL & FMDOOH EXPOSURE VS SOCIAL ONLY EXPOSURE
AVERAGE AWARENESS / RECALL SCORE	48%	42%	45%	+8%
POSITIVE EMOTION / EMOTIONAL RESPONSE	61%	59%	82%	+40%
TOP MESSAGE TAKE OUT	47%	47%	50%	+6%
CONSIDERATION	77%	71%	83%	+17%
PURCHASE INTENTION	60%	56%	67%	+20%
TAKEN ANY ACTION	61%	55%	81%	+48%
AVG SHIFT				23%

POSITIVE IMPACT ON THE WHOLE BRAND FUNNEL

When looking at the % shifts among those exposed to social & FMDOOH elements vs those only exposed to social media element, there was a positive increase on the whole brand funnel:

- Awareness/ recall
- Consideration
- Positive emotion
- Call to action
- Top message take out

GENERATING EXCITEMENT AMONG CONSUMERS

- +66% got consumers 'excited'

- +28% 'promoting different communities'

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PRIMING CONSUMERS TO START PLANNING

+52% encouraged consumers to get 'planning'

+38% for 'families'

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INCREASING PRODUCT KNOWLEDGE



- +60% need to 'try' the product
- +14% increase in product 'knowledge'

CONSUMER ACTION



AVERAGE SHIFT
INCREASE

61%



EXPOSED TO
OOH ONLY

55%



EXPOSED TO
SOCIAL ONLY

81%



EXPOSED TO BOTH
MEDIA ELEMENTS

LARGEST SHIFT IN DRIVING CALL TO ACTION

One of the largest shifts seen across the brand funnel is in **consumer action**. With a **+48%** increase when **FMDOOH** is added to **social** plan.

Source; Talon 4th Space project: 3 case studies avg

GENERATING WEB VISITATION AND SPARKING CONVERSATION



+86%
Increase in
word of mouth



+31%
Shift in website
visitation



+44%
Product
purchase

STORE EFFECT METHODOLOGY



STEP 1

Load details of the POI's (OOH sites) and store locations into the Geo location panel



STEP 2

Track and monitor the Geo Location panel of consumers in relation to the longs/lats of the POI's, as well tracking store visits.



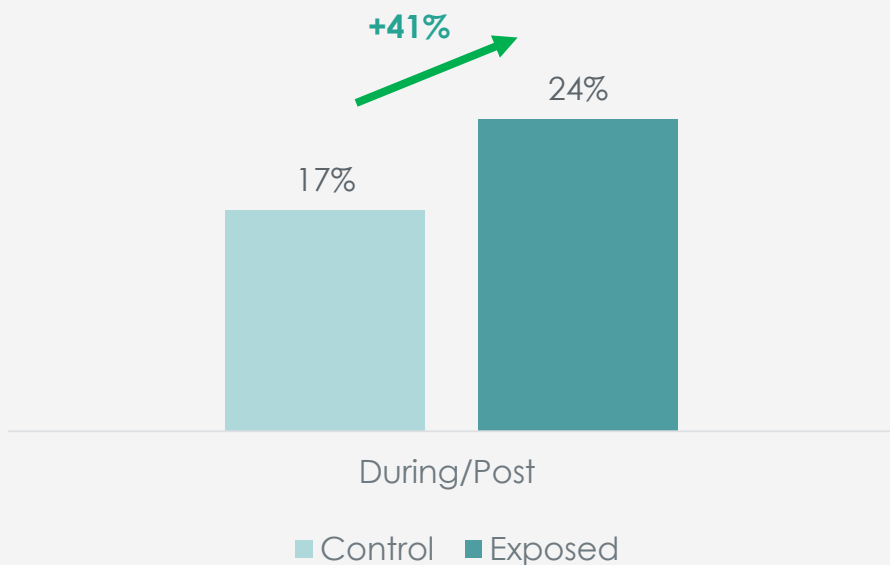
STEP 3

Create exposed & control groups matched on location behaviour, app usage & visitation of the retailer to determine the impact of driving store footfall

AVERAGE OF 58% INCREASE IN ADDITIONAL VISITORS

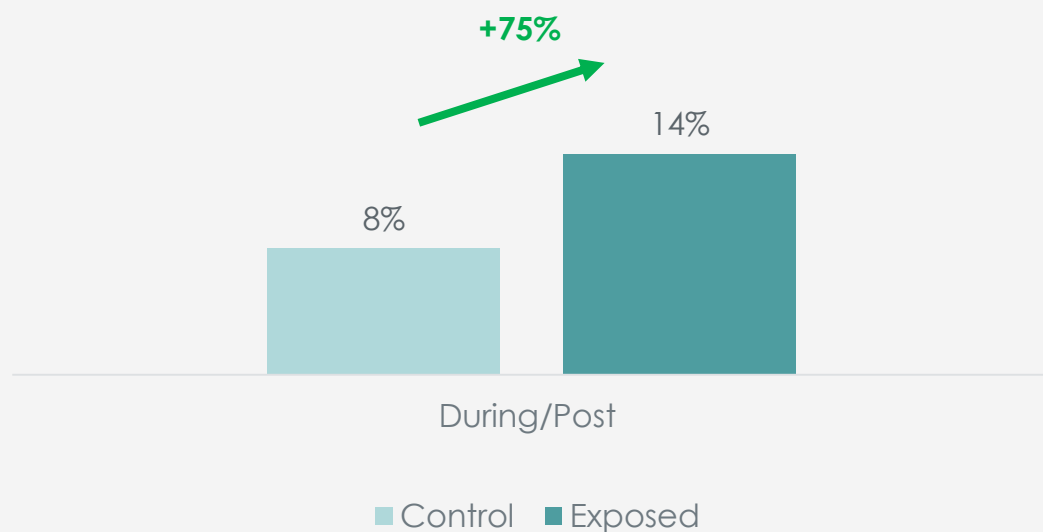
Case study 1: % visited store

41% increase in incremental visitors
7,627 additional visitors



Case study 2: % visited store

75% increase in incremental visitors
3,336 additional visitors



SUMMARY

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- We know OOH can be used as a legitimate and effective video channel alongside online and particularly social
- Ambition to help guide creative teams to produce video which will work across different channels
- Future opportunity for video advertisers to extend their online buys into OOH



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