

I S B A

Inside out of home

Wednesday 20th March 2024



Introduction

Bobi Carley

Head of Media and Diversity & Inclusion Lead

ISBA



Programme

Why out of home – Jane Lee & Tom Crichton, Global

Intro: “OOH Fact or Fiction” – Tim Lumb, Outsmart

PwC Report (given back and sustainability) – Andy Lobo and Sam Tomlinson, PwC

Audience and effectiveness – Denise Turner, Route and Alex Tait, Entropy and John Perella, Perella Mackay

Creativity – Mandeep Khatar, JCDecaux and Aimee McKay, Clear Channel and Marie Le Hur, Ocean Outdoor

Conclusion: “OOH Fact or Fiction” – Tim Lumb, Outsmart

Close - Bobi Carley, ISBA

Why out of home?

Jane Lee

**Head of Business Development
Global**

Tom Crichton

**Director of Client Development
Global**





ISBA

Get Real

How Out of Home fulfils our need
for in person experiences at scale

OUTSMART



**What marketers
think your
consumers want**



**What your
consumers want
to see from you**



Over 75% of us say they just want to feel something, to feel alive...

Source: Wunderman Thompson, The Age of Reechantment



...But 70% of us can't remember the last time a brand excited them

Voice

The least fun years any of us will collectively experience

Mike Rucker Behavioural Psychologist



Consumers overwhelmingly have a preference for in person advertising that Marketers are neglecting

Preference	Global Consumers	Marketers
1.	Sponsored Events	Online video
2.	Cinema	Sponsored events
3.	Out of Home	Digital Out of Home
4.	Point of sale	Video streaming
5.	Digital Out of Home	Social media story

Source: Kantar Media Reactions 2023



When it comes to capturing attention, Out of Home grabs consumers before it grabs marketers

	Global Consumers	Marketers
1.	Cinema	Influencer content
2.	Out of Home	Cinema
3.	Digital Out of Home	TV

Source: Kantar Media Reactions 2023



OOH is the last true broadcast medium

Slide 11

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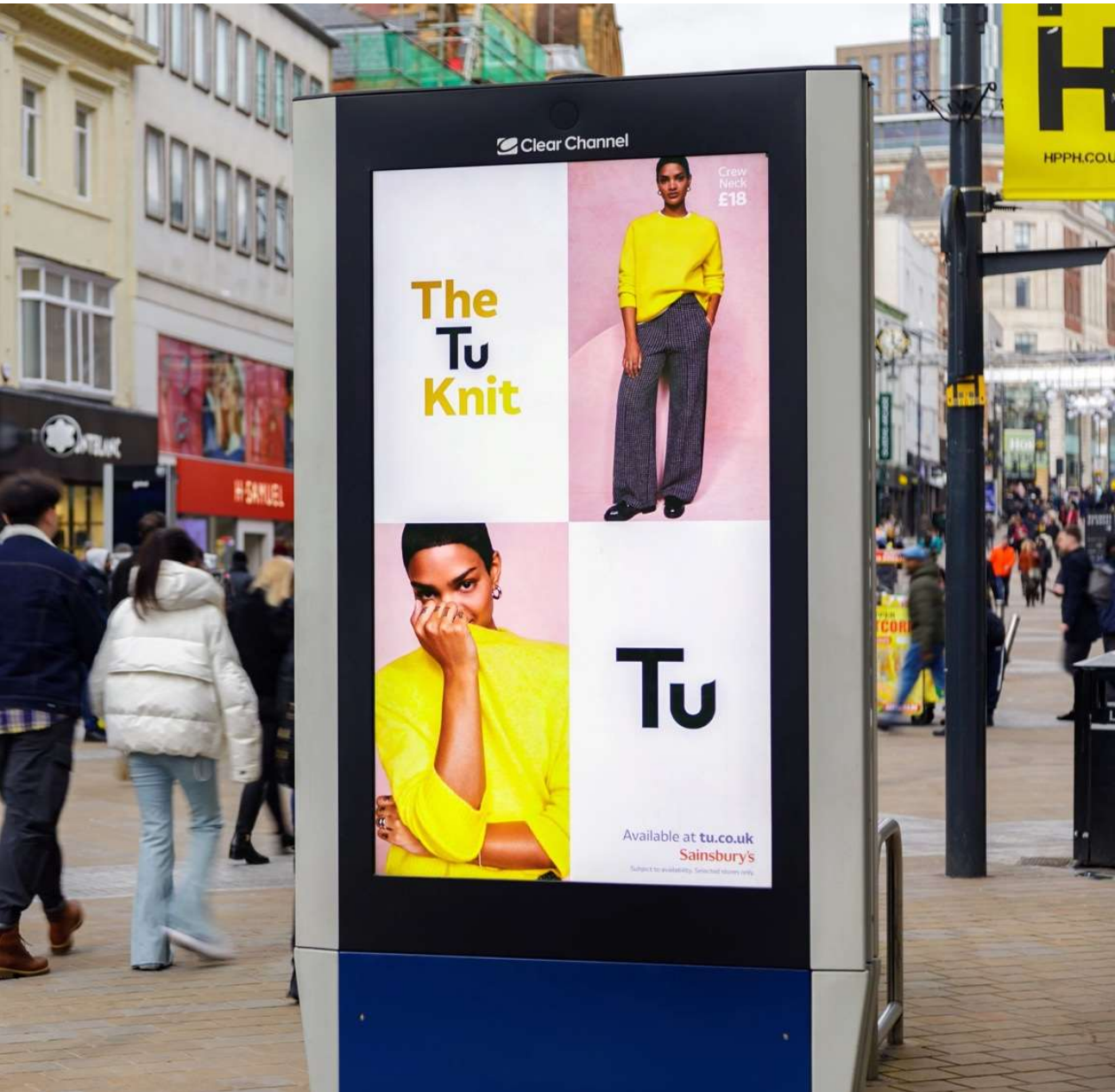
[@Tom Crichton] pass over to me here

Jane Lee, 2024-03-18T10:45:02.092

98%

OUTSMART

Source: Route 50







Jason Okundaye

@jasebyjason

I've seen this advert this week more than I've seen my own mother and I live with her



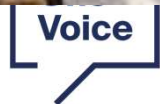
Sorry Jason...



And for younger audiences, Out of Home is their home

124

9-10 hours a day





**And in a world where it's hard to know
who to trust...**

Consumers Trust OOH

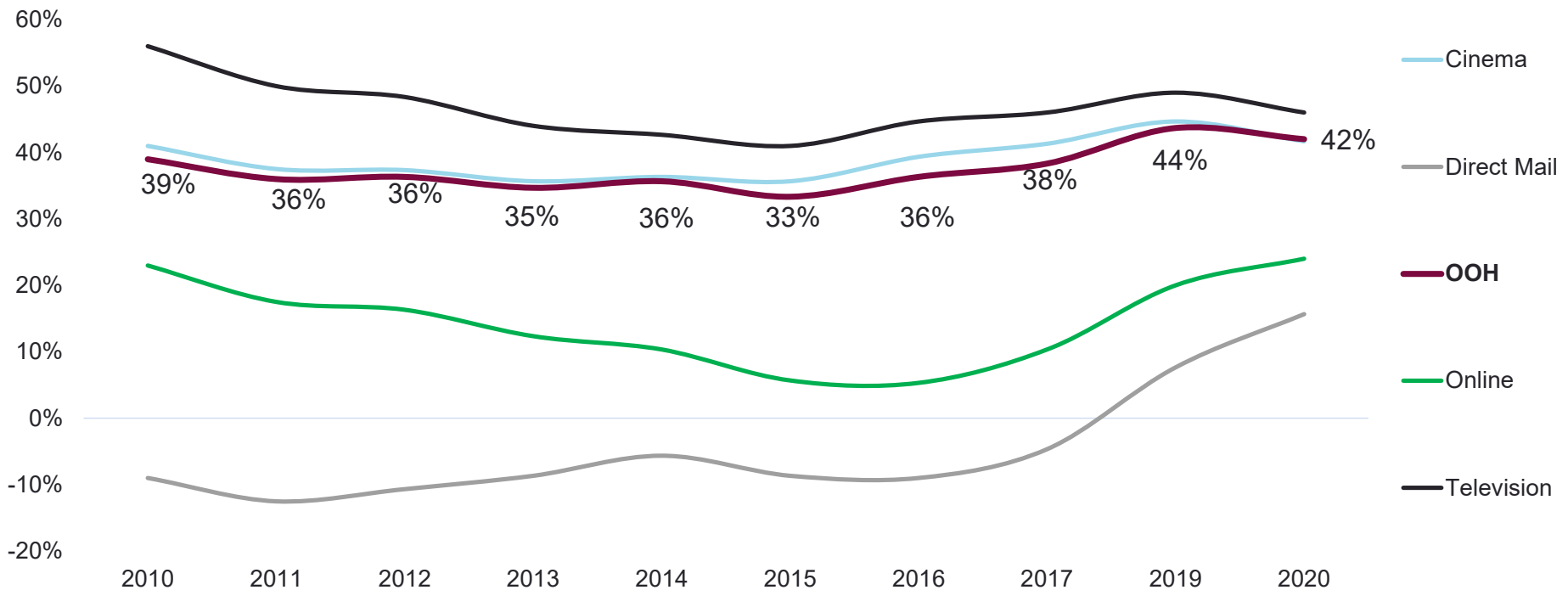
Outdoor works not simply because you see the message, but because everyone around you sees the message and everyone around you knows that everyone else saw the message.

Richard Huntington, chairman and chief strategy officer at Saatchi & Saatchi



Whilst Trust in TV advertising has declined in the past decade, OOH has remained constant

Trust in different advertising media types – 3 year rolling average
[showing NET Trust]

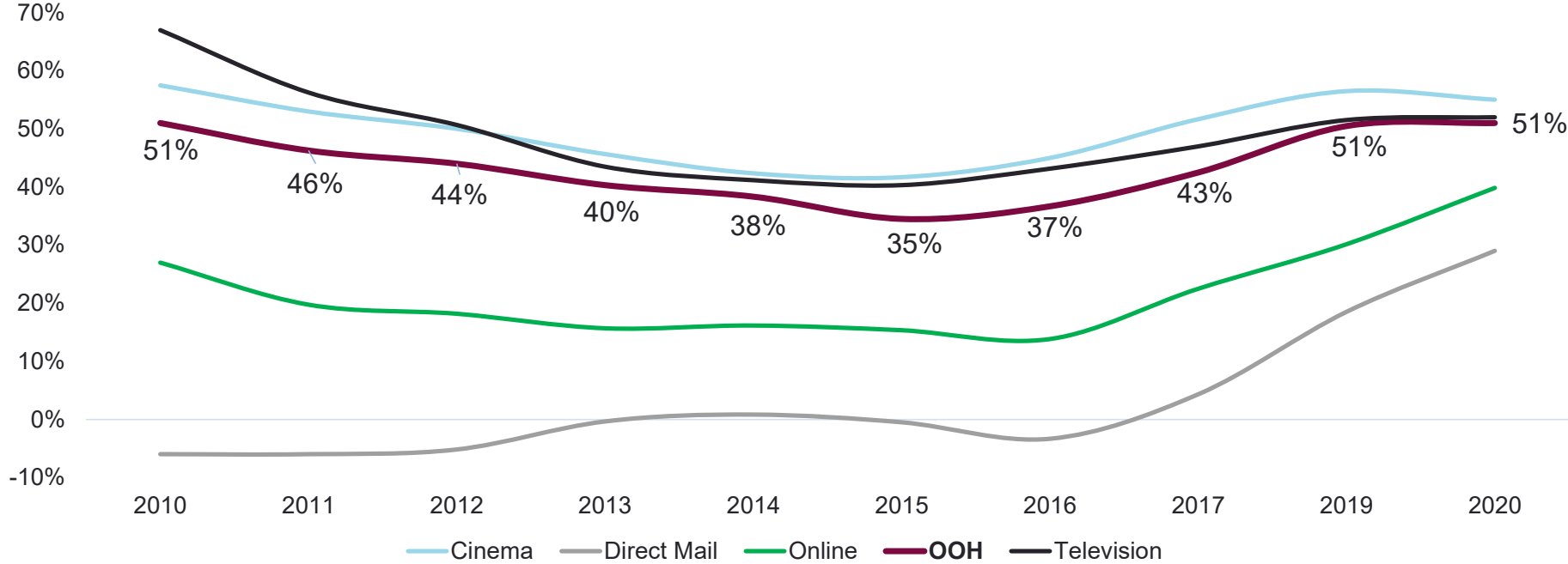


Source: Credos public trust tracking data. Trust in different advertising media types. UK adults age 18+, 2010-2020 (n=22,718)



The young have been the most dynamic in terms of trust towards media types, with the NET differential of all media types decreasing by ~50%

Trust in different advertising media types – 3 year rolling average
 [showing NET Trust]

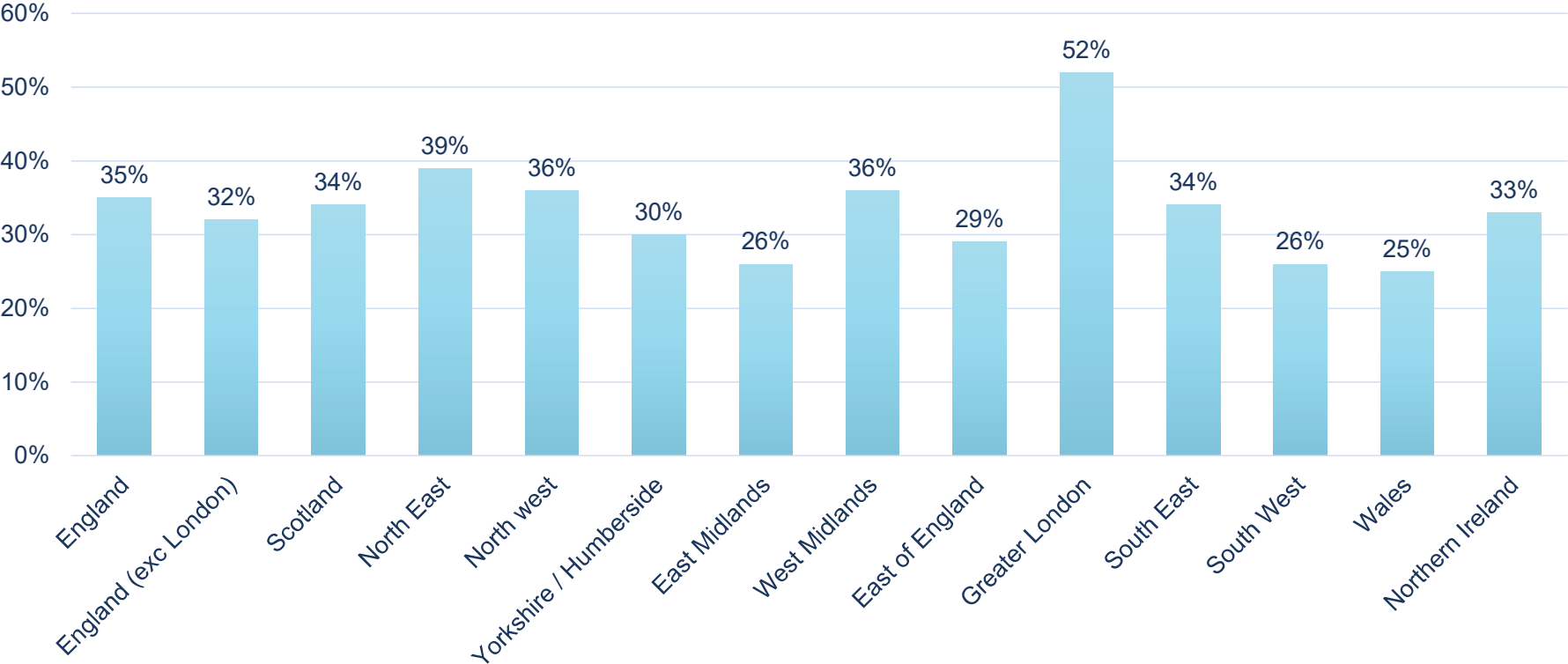


Trust in different advertising media types. UK adults age 18+, 2010-2020 (n=22,718)



Trust in OOH advertising is higher in regions where we find young, urban professionals

Trust in outdoor advertising by region in 2023
[showing NET Trust]



Advertising in public spaces is an investment in public trust



BBC

ENTER THE NEW WILD

PLANET EARTH III

Watch on iPLAYER

Clear Channel

The billboard features a close-up image of a snake's eye peering through a hole in a reddish-brown rock surface. The text is overlaid on this image. The 'BBC' logo is at the top center. 'ENTER THE NEW WILD' is written in large, bold, yellow letters across the middle. 'PLANET EARTH III' is written in smaller, blue, sans-serif letters below it. At the bottom left, there is a small logo for 'iPlayer' and the text 'Watch on'. At the bottom right, there is a logo for 'Clear Channel'.



And an investment in public good



Often imitated, never duplicated
The Rise and Fall of FOOH

The
problem
with
FOOH is
the
fakery





Teddy R. • 2nd

CMO at Grind. Coffee on the internet, formerly IRL

1d • 🌐

+ Follow ...

I've made a discovery that's too good not to share...

There's a company called [Global](#) (like the planet! 🌐) and you can PAY them to post all those ads you all mock-up and post on LinkedIn.

They print them out and stick them up for real people to see and everything!

Follow me for more 2024 advertising tips! [#advertising](#) [#bathwater](#)

feat. [Grind](#) / [Liberty Radice](#) / [Stacey Britt Fitzgerald](#) / [Among Equals](#) / [Emily Jeffrey-Barrett](#) / [Squadron Venture Media](#) / [James Burgess](#) / [Tom Lucas](#)



**Fake Out of Home
lacks the in-person
experience, the reach
and tests consumer
trust**



If locals hadn't yet seen the transport vehicles brandishing the movie's stars – Ryan Gosling as Ken and Margot as Barbie herself – they would have locked eyes with the massive billboards plastered across London and in tube stations.

Not stopping at 2D promotion, a **Barbie-fied Doctor Who TARDIS** joined the pink party when it appeared next to Tower Bridge on Tuesday in all its fluorescent glory.



'Barbie' Fever Hits London With Pink Buses, Taxis Landmarks and Even a 'Doctor Who' TARDIS
By R.J. Teasdale



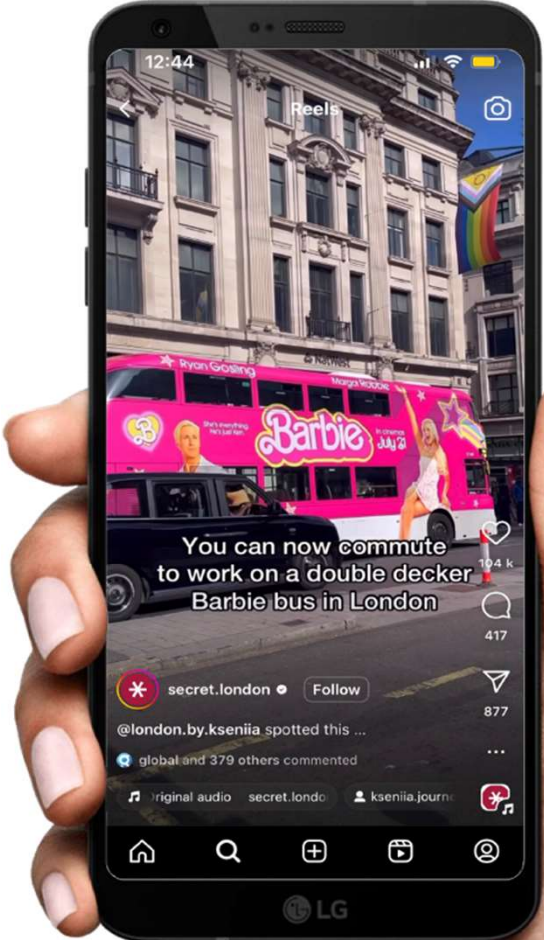
'Barbie' is turning London pink
All aboard the Barbie bus!



@868nathan
You can't go anywhere in London without seeing a #barbiebus.

Dear @TfL. Please never paint over these wonderful #Barbie buses. Women of this city deserve to have Ryan Gosling pass by us every now and then.

So cool I love these buses wish we had them in other places #london #Barbie #barbiebus





YOU'VE
NEVER SEEN
ENGLAND
LIKE THIS
NEVER SETTLE, NEVER DONE



Because
when it's
real, it's
really
good!

Which is why innovative brands love the real thing

Slide 31

0

[@Tom Crichton] come back in here

Jane Lee, 2024-03-18T10:45:16.845

OUTFRONT / PRIME

Caln

CLEAR CHANNEL

Share your rom-com moment with **#YourPlaceOrMine**

From The Writer Of
27 DRESSES
&
THE DEVIL
WEARS PRADA

ON OR
NETFLIX | NOW
PLAYING

Your Place
or Mine

ballistic

EST

Welcome to
Jollibee Times Square!
Jolly New Year!

Jollibee
9am to 12am

LEAP

INTO NEW WORLDS
of technology and
a new look
at the future

STARBUCKS
COFFEE

ART FOR THE HOME

data x INFO

BROADWAY

Breakfast
Dinner
Cafe





SAMSUNG

When is a circle not a circle?

The Circle Line feels like compressed goldmine, with memorabilia, gift guides, and more.

On new Galaxy S24 Series use a circle to transform how you search. Just draw the word anything on screen to get fast Google search results, without leaving the app while using.

An app redesign to really transform the Circle Line into a circle. And rename it the Circle to Search the pure what we do there?

Circle to Search with Google

Galaxy S24 Series



CIRCLE TO SEARCH LINE





96.7 RADIO CITY

ROCKSTAR ENERGY DRINK PRESENTS
STORMZY
1 PERFORMANCE • 5 WORLDS
WATCH NOW  ON SPOTIFY

ROCKSTAR ENERGY DRINK
PERFORMING LIVE

ROCKSTAR ENERGY DRINK
PRESS PLAY

OCEAN

YOU
MA

ROCKSTAR ENERGY DRINK
PRESS PLAY

ROCKSTAR ENERGY DRINK



**And our clients love what Out of Home
can do for them**



“There's nothing like Out of Home for getting your brand in front of a huge audience quickly. Not only does it build trust and excitement, it also moves the needle when it comes to rate of sale.”

Ralph Strampfer, Tenzing



“It allows us to add stature and ‘brand magic’ to plans, as well as proximity targeting for key retail periods. We love the new standout formats being brought to the UK and have run some incredible recent executions.”

Gayle Noah, L’Oreal





ISBA

Get Real

How Out of Home fulfils our need
for in person experiences at scale

OUTSMART

Intro: “OOH Fact or Fiction”

Tim Lumb

Director

Outsmart



Fact or Fiction

Tim Lumb, Outsmart

OUTSMART

The background of the slide is a solid black field. Overlaid on this are several glowing, semi-transparent lines in shades of magenta and lime green. These lines are curved and overlapping, creating a sense of motion and depth. Some lines are straight, while others form loops or spirals. The overall effect is a dynamic, abstract composition that suggests a complex or interconnected theme.

OOH is just ads, right?

Is OOH sustainable ?

How do I know who sees OOH?

How do you prove its effectiveness?

How can my OOH cut through?



PwC Report (giving back and sustainability)

Andy Lobo

Senior Manager

PwC

Sam Tomlinson

Partner and UK Entertainment & Media Leader

PwC



Supporting UK society: The OOH advertising sector's impact

March 2024



Introductions



**Sam Tomlinson, Partner and
UK Media Leader, PwC**



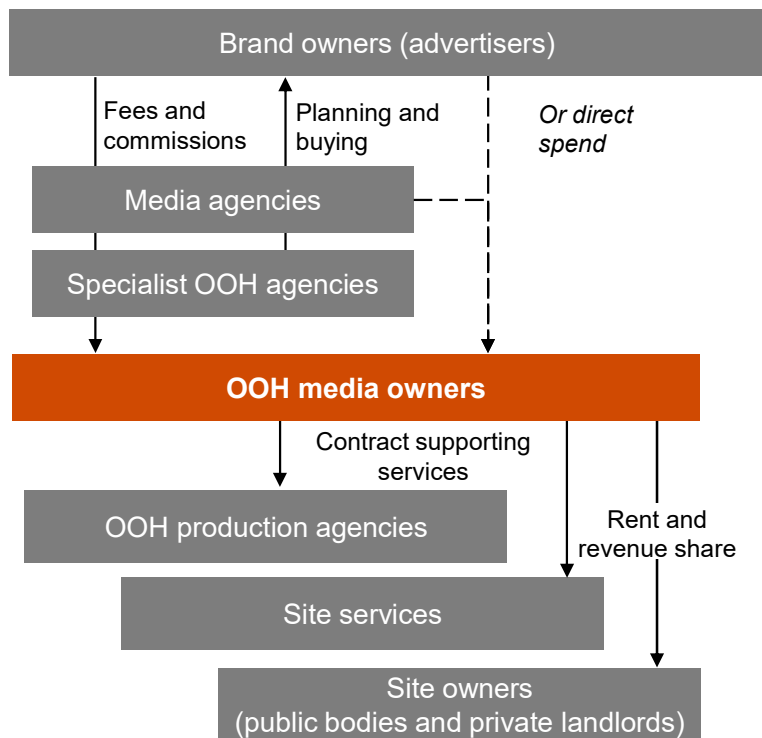
**Andy Lobo, Senior Manager,
PwC Strategy&**

Examples of our clients across the advertising market



Our analysis of the social, environmental and economic impact of the sector is based on analysis of media owners in 2021

Focus of our research



Our methodology and approach

What we set out to do...

- Assess the positive impact that the UK OOH industry has on the economy and on society

What we did not do...

- A full economic or environmental study measuring the total 'net' (positive minus negative) benefits to the UK economy and local environment
- We do not consider any 'indirect' or 'induced' impacts from investments in the sector on other companies, individuals or stakeholders

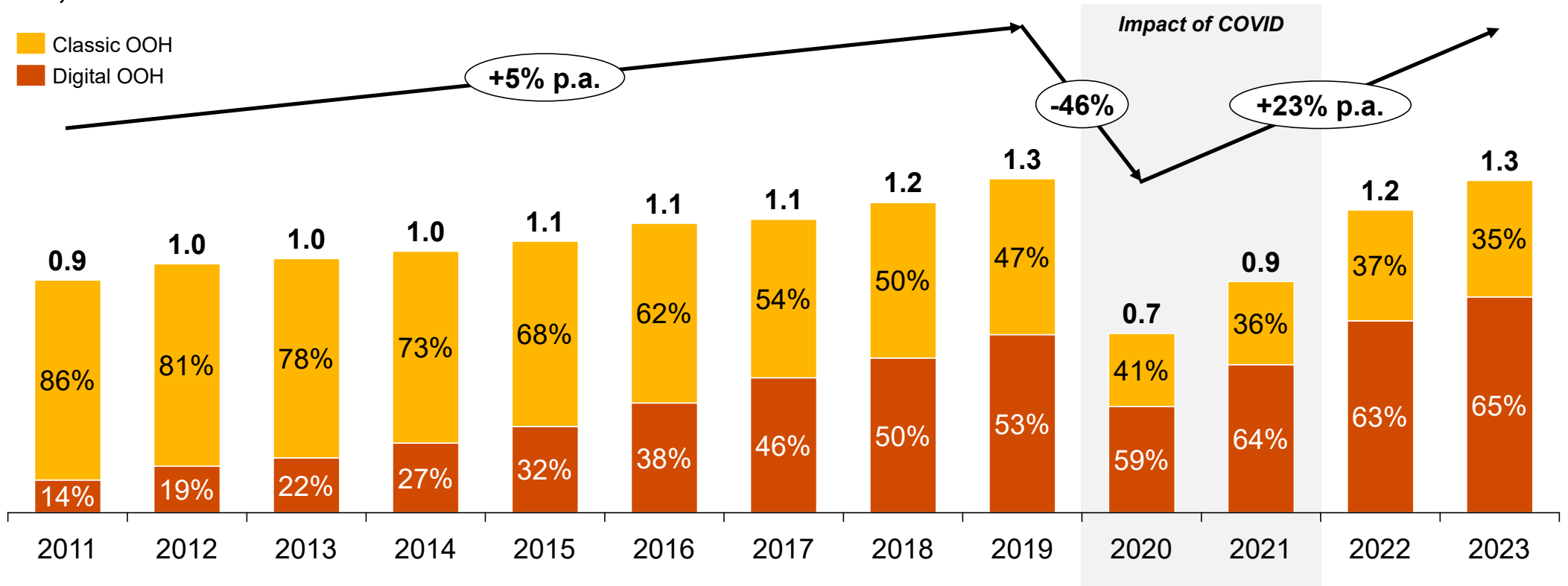
Our findings are based on...

- A survey of 9 OOH media owners, representing 92% of industry revenue (2021) – this has been scaled up to represent the entire industry
- 6 in-depth interviews with senior executives at larger OOH media owners

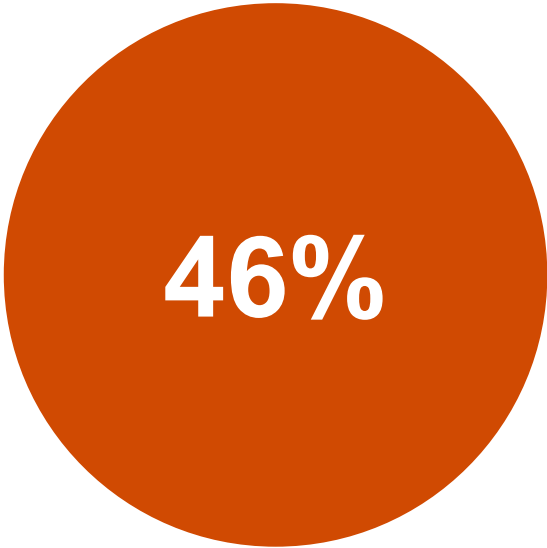


Prior to COVID, spend on OOH was growing well; the sector has broadly recovered from the pandemic

OOH industry revenue
£bn, 2011 – 2023

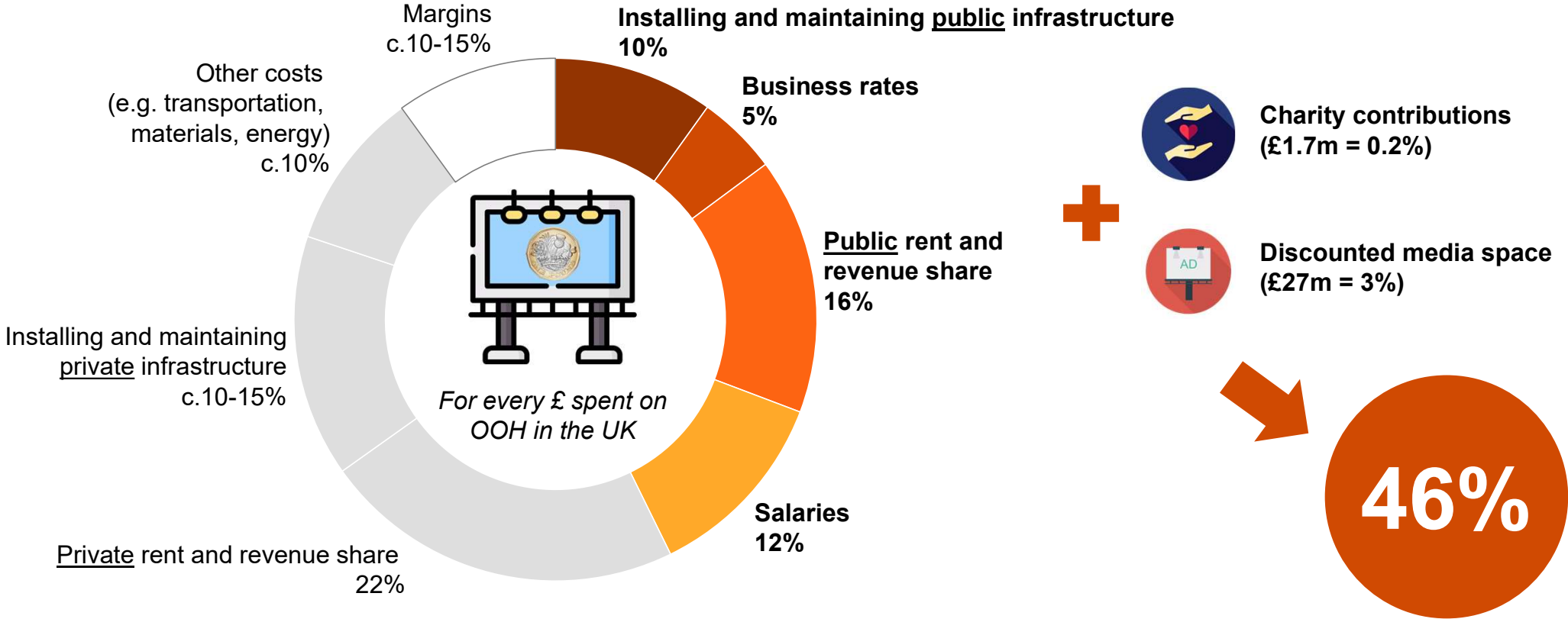


If you remember two numbers...



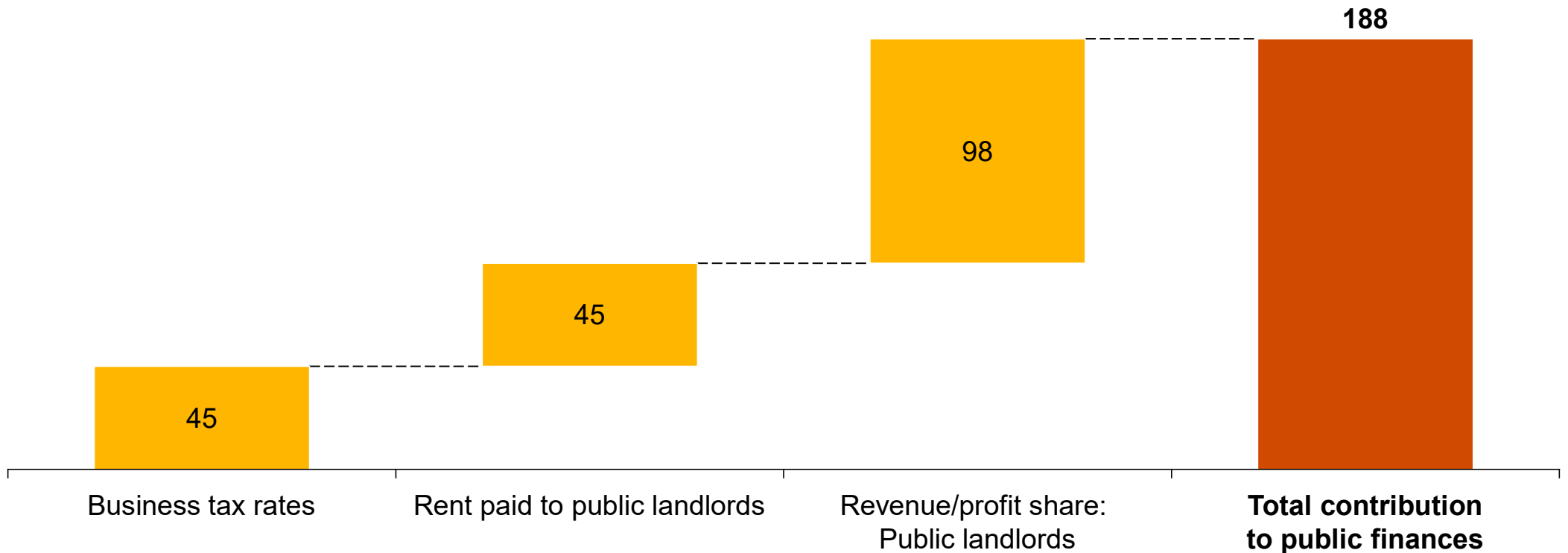
We found the OOH industry invested 46% of revenue back into employees, communities, public services and infrastructure

Breakdown of how OOH media owner revenue



OOH media owners contributed £188m in 2021 towards public finances through business rates and rent

OOH revenues that contribute to public finances
£m, 2021

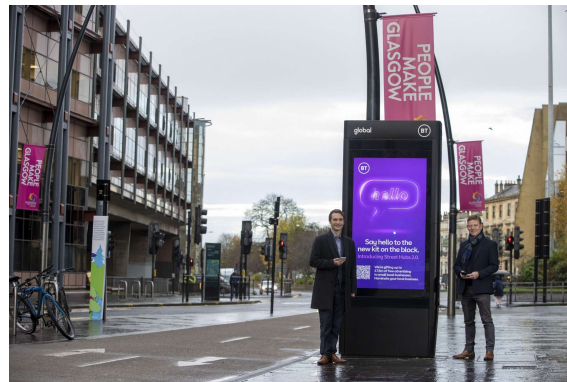


In 2021, £16m was invested into installing new public infrastructure and £73m on maintaining existing structures

OOH industry investment into public infrastructure and services £m & #, 2021

CAPEX	Total spend on new installations	£16m
	Volume of new installations (excluding replacements)	1,786
OPEX	Spend on ongoing maintenance and upgrading/maintaining existing public infrastructure	£73m
	Volume of existing installations	107,052

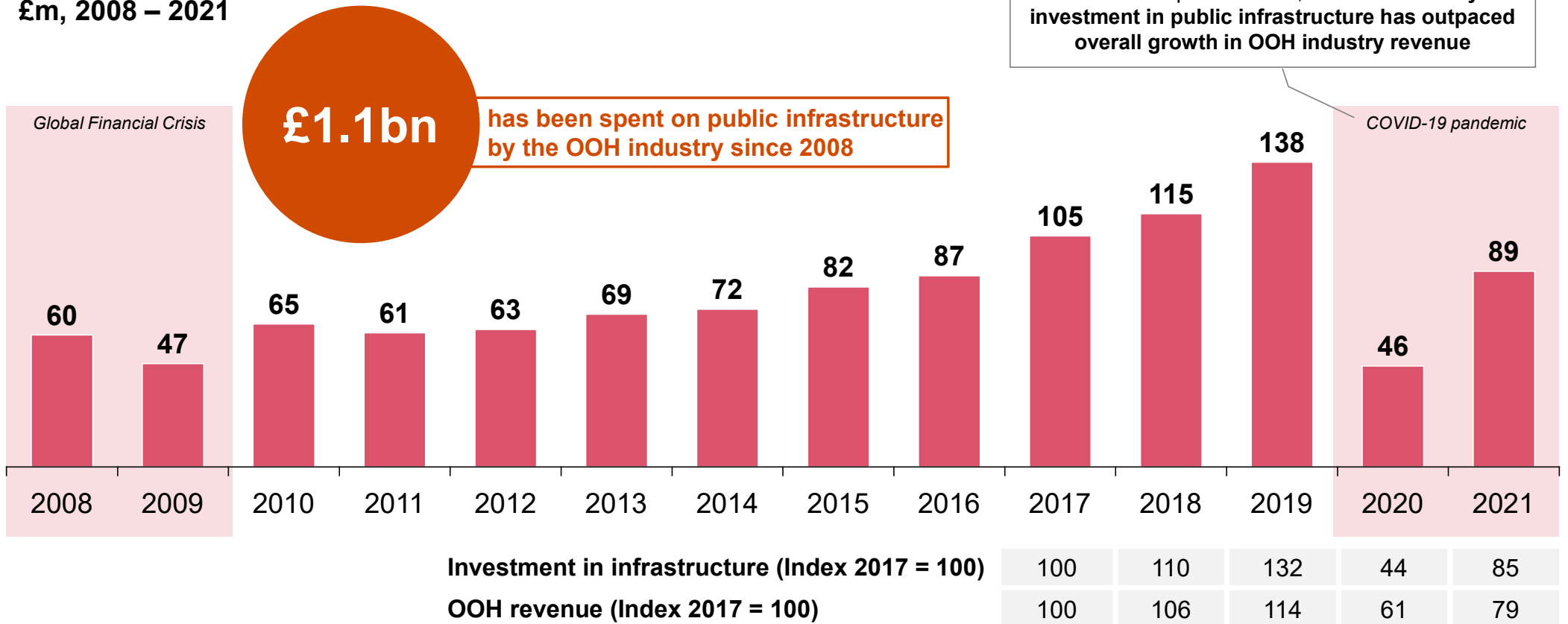
OOH media owners equip their public infrastructure with other services that support communities



Over the last 14 years, OOH media owners invested £1.1bn into installing and maintaining public infrastructure

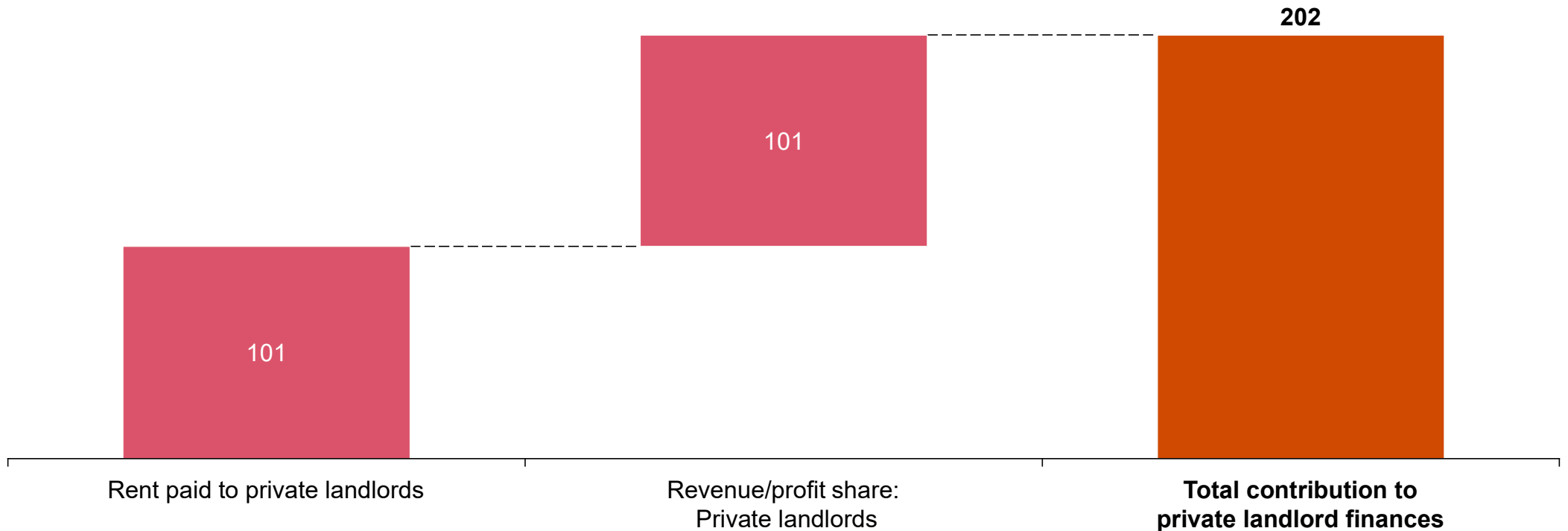
Investment into public infrastructure (includes CAPEX & OPEX)
£m, 2008 – 2021

With the exception of 2020, the **OOH industry's investment in public infrastructure has outpaced overall growth in OOH industry revenue**



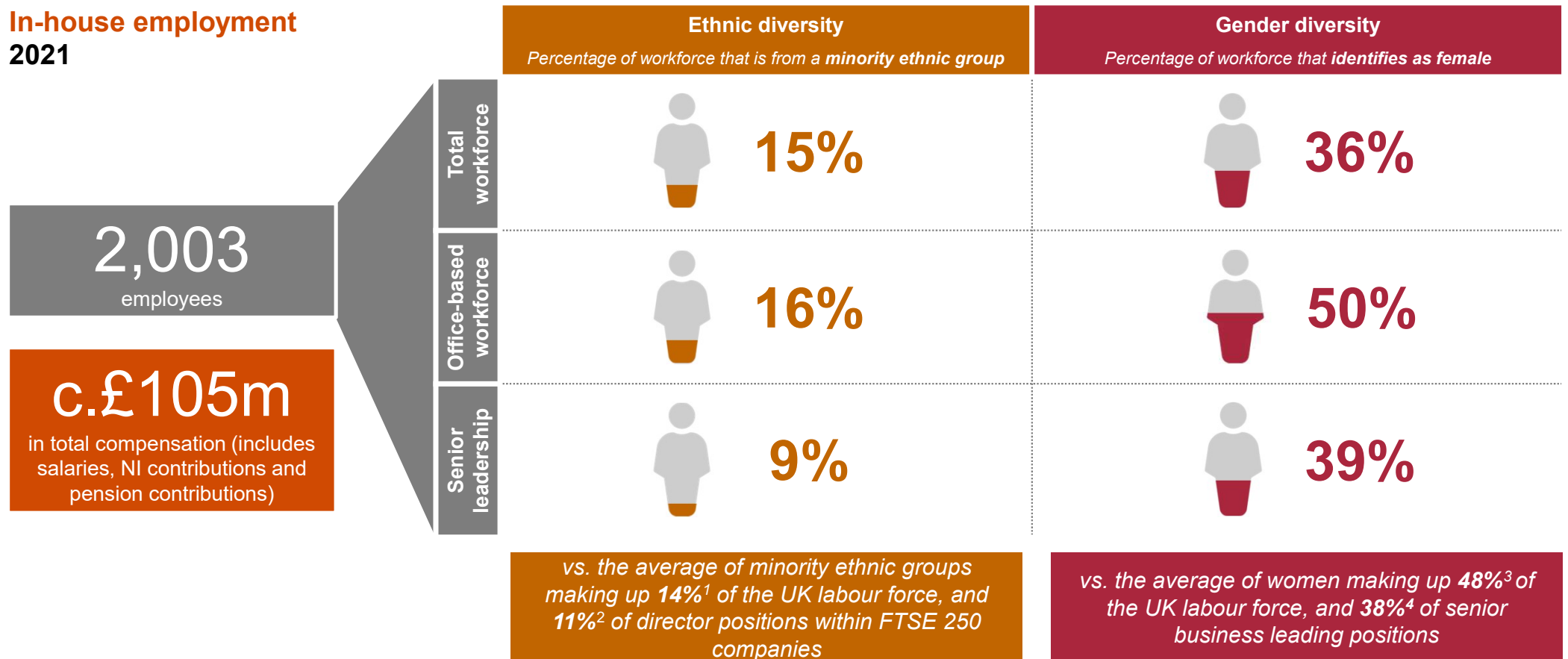
OOH media owners further contributed £202m in 2021 towards private finances through rent and revenue shares

OOH revenues which contributes to private finances
£m, 2021



The OOH industry hires c.2,000 people, broadly representing the diverse make-up of the UK labour force

**In-house employment
2021**



Media owners have made commitments to achieve Net Zero by reducing emissions across all scopes



Scope 1

Scope 1 covers direct emissions from owned or controlled sources



e.g. emissions from vans used for billposting



Scope 2

Scope 2 covers indirect emissions from the generation of purchased electricity



e.g. emissions from the electricity purchased to run digital screens



Scope 3

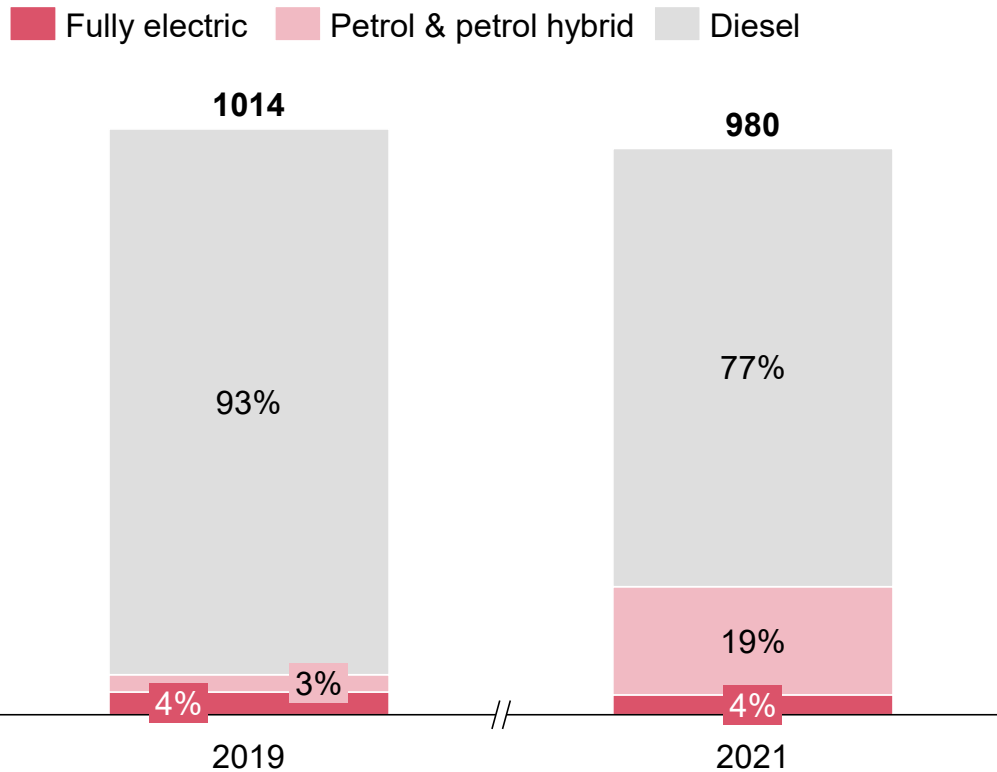
Scope 3 includes all other indirect emissions that occur in a company's value chain (the majority of the OOH industry's emissions)



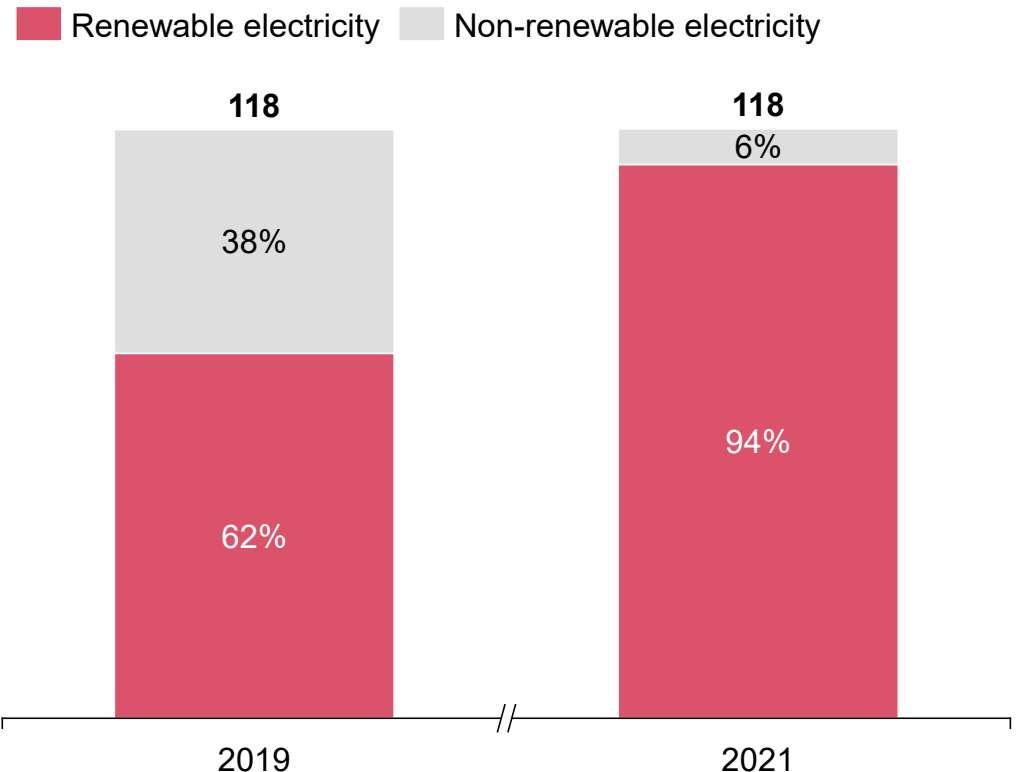
e.g. emissions from procured materials, like billboard casing

The industry is addressing Scope 1 and 2 through greater use of renewable fuel and energy sources...

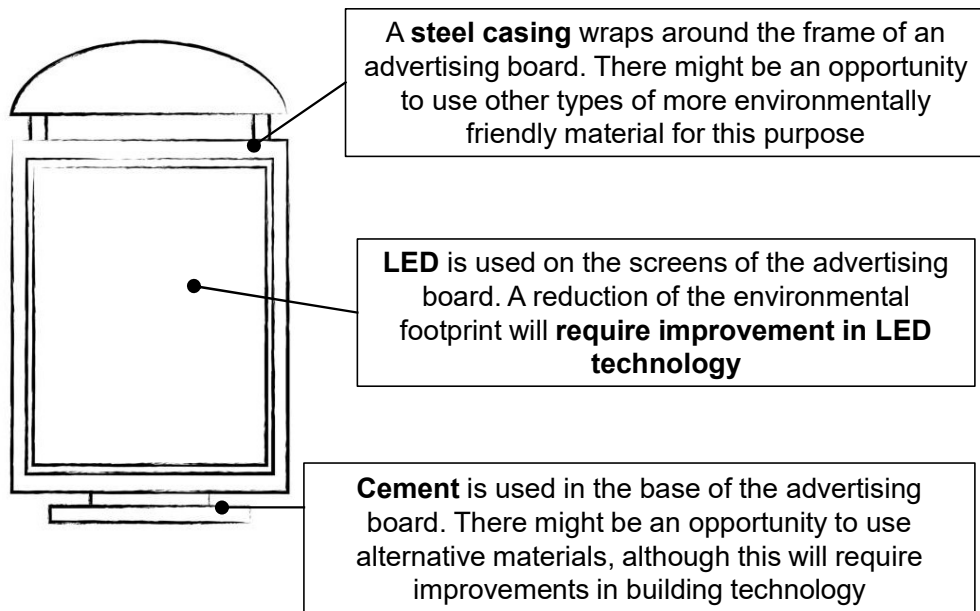
**Vehicles in the OOH industry's fleet
#, 2019 & 2021**



**Electricity consumption by OOH media owners
GWh, 2019 & 2021**

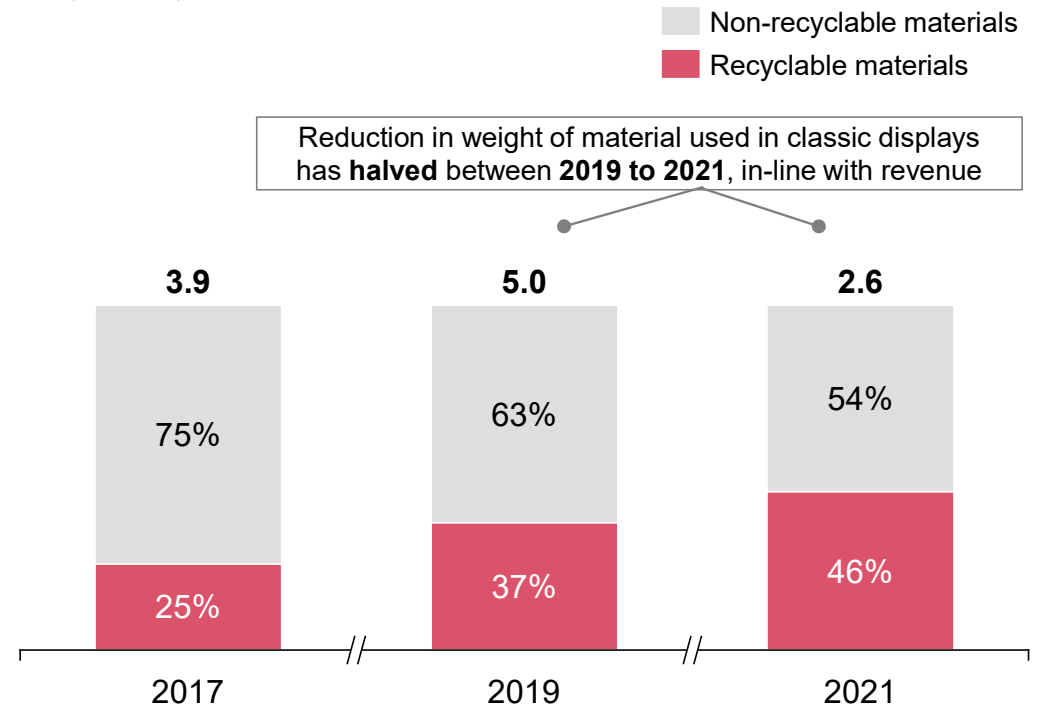


...and working to reduce Scope 3 emissions in its raw materials, with further innovation to come



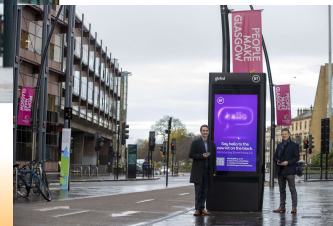
Material used for classic displays across the OOH industry¹

KT, 2017, 2019 & 2021



In 2021, 46% of OOH revenues were invested in society, totalling £1.1bn spend on public infrastructure since 2008

Total <u>annual</u> contribution	
Installing public infrastructure	£16m
Maintaining public infrastructure	£73m
Business rates	£45m
Public rent and revenue share	£143m
Total direct staff compensation	£105m
Media space discounts for charity	£27m
Money and staff time donated to charity	£2m
TOTAL	£411m



46%

£1.1bn

Audience and effectiveness

Denise Turner

CEO

Route

Alex Tait

CEO & Founder

Entropy

John Perella

Chief Marketing Effectiveness Director

Perella Mackay





Audience and effectiveness

Denise Turner

CEO

Route

Alex Tait

CEO & Founder

Entropy

John Perella

Chief Marketing Effectiveness Director

Perella Mackay



Creativity

Mandeep Khatar
Head of Insight
JC Decaux

Aimee McKay
Client Partnership Director & Europe Lead
Clear Channel

Marie Le Hur
Marketing Director
Ocean Outdoor



The background features a complex, abstract design of glowing, overlapping lines in shades of magenta, pink, and lime green. These lines form various shapes, including circles, spirals, and elongated curves, creating a sense of dynamic movement and energy against a solid black background.

ISBA

Creativity session

March 2024

OUTSMART

The creative building blocks for OOH

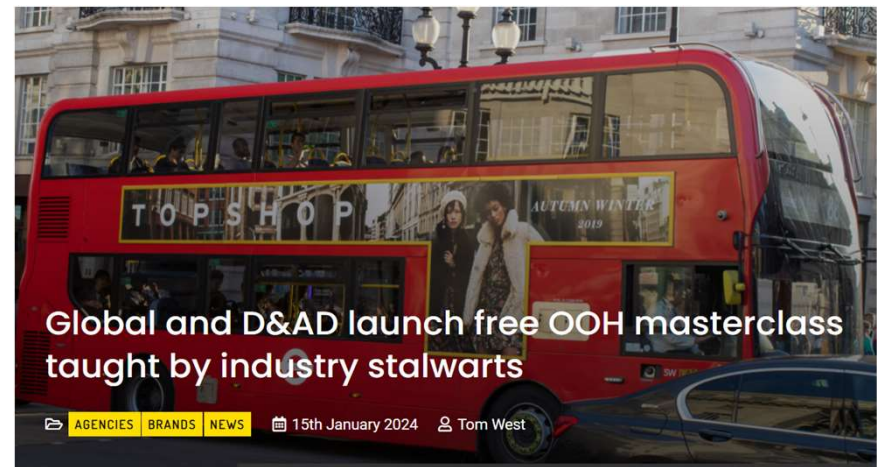
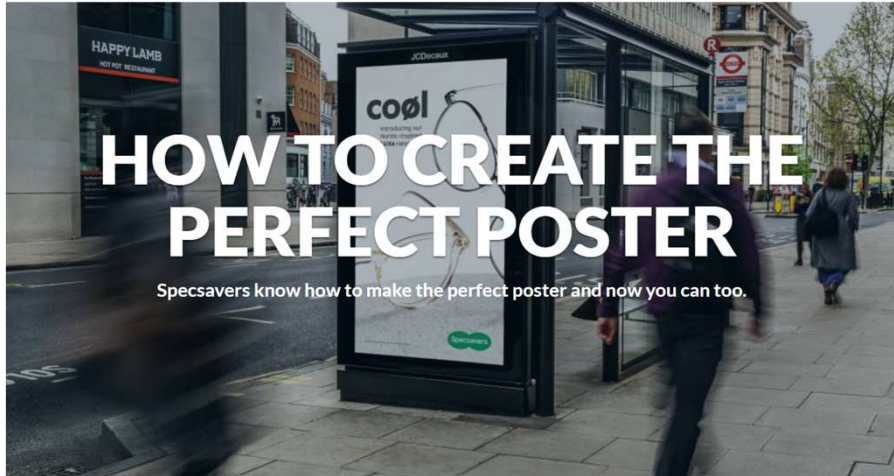
Memorable Special Builds and Unique Activations

Unlocking the digital capabilities of OOH

Power of **DOOH**

The foundation for all OOH campaigns, designing for the channel

Brilliant **poster** design



The power of optimisation

OUTSMART

OOH works differently.

We tested over 50 ads to create best practice guidelines to deliver **the perfect digital poster.**

High Reach

98%

High Frequency.

12

2
Seconds
of Attention.

THE 9 GUIDELINES FOR CREATING THE PERFECT POSTER

- | | | | | | |
|---|------------------------|--|---|------------------------|--|
| 1 | Demand attention. | 2 secs of attention = max 3 sections | 6 | Expand product Images. | Larger than 50% = +38% more attention |
| 2 | Be brand bold. | Prominent branding = +32% brand recall | 7 | Shorten copy. | More than 10 words = 30% less brand recall |
| 3 | Drive familiarity. | Familiar brand colours drive fluency | 8 | Shout your CTA. | Double the CTA size = double the dwell |
| 4 | Deploy fluent devices. | Fluent devices = +1/3 more effectiveness | 9 | Sell, sell, sell. | Bottom sections <10% = -24% attention |
| 5 | Showcase faces. | Use faces to draw attention to message | | | |

1

Demand Attention.

2 seconds of attention

Max 3 sections



2

Be brand bold.

Ensure your brand is in a prominent position.

Logos at the top deliver +32% brand recall



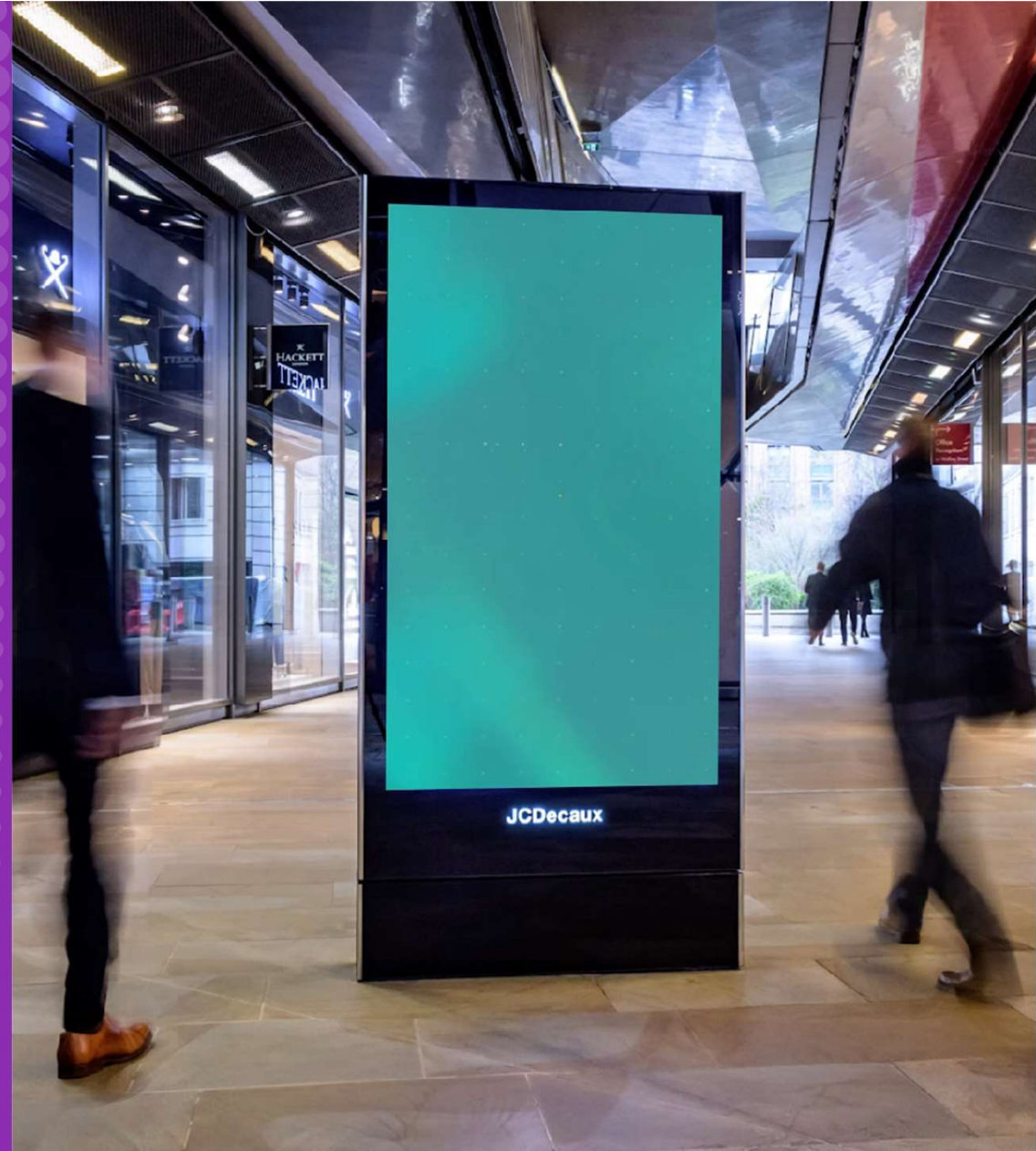
3

Drive familiarity.

Simple colours aid brand recall

Top performing Ad

93% fast fluency



4

Deploy fluent devices.

Using a Fluent Device makes your creative 1/3 more effective!*

* Meaning fluency and emotion



5

Showcase faces.

Faces attract attention.

Ensure that your position them to support the rest of your messaging.



6

Expand product images.

Products that take up >50% of the creative deliver 38% more attention (2.28s).

Products at <50% size are viewed for only 1.65s



7

Shorten copy.

More than 10 words means
people are 30% less likely to
remember who you are.



8

Shout your call to action.

Doubling the size of CTA doubles the dwell.



9

Sell, Sell, Sell.

Bottom sections that are smaller than 10% of the creative deliver -24% of attention.



The power of digital

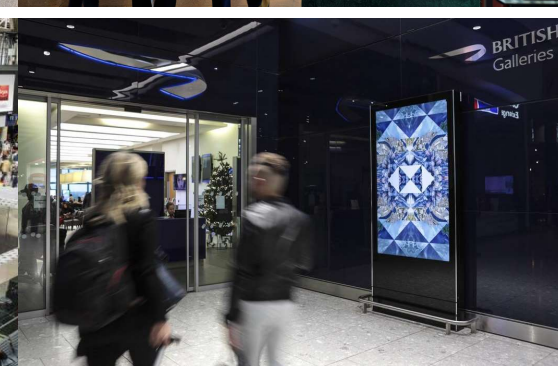
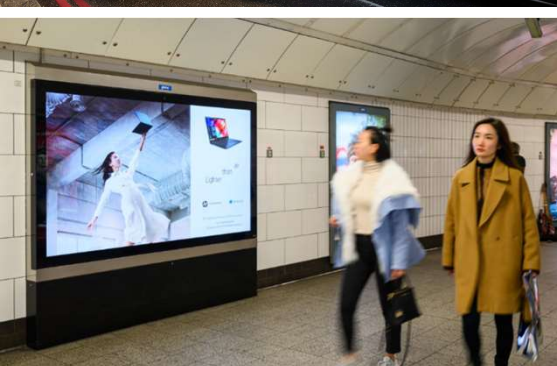
OUTSMART

Digital at scale

16,000+

digital screens

83% weekly reach

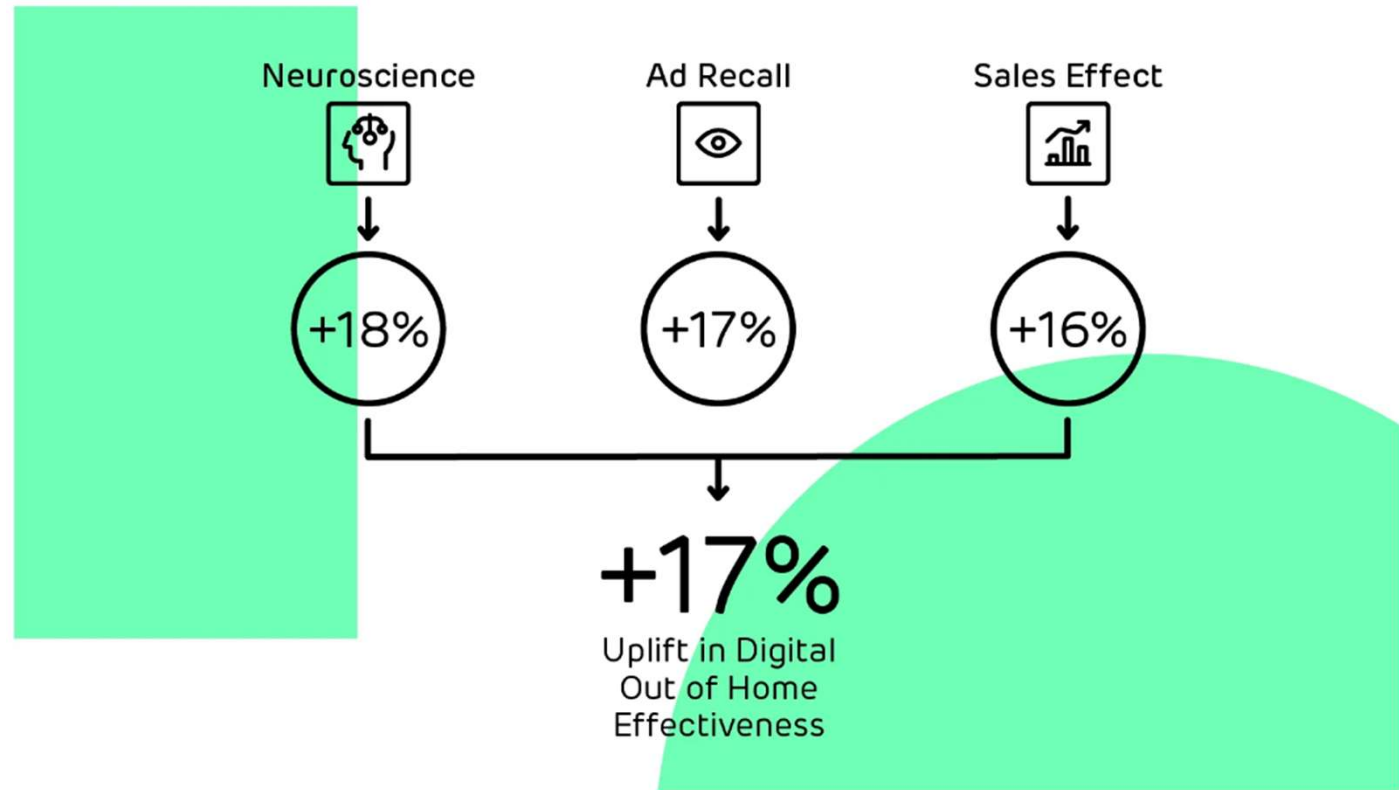


OUTSMART

Moments for Truth

The Moments of Truth is a research project that proves how the use of contextually relevant messaging in digital Out of Home will increase its effectiveness by an average +17%.

It demonstrates the power of relevancy in Out of Home to increase consumer brain response, ad recall, brand / creative rating, and sales response.



The power of context

Moment



+12% increase when displaying a message at the most relevant moment

Content



+18% increase when displaying contextually relevant content

Moment & Content



+32% increase when combining the relevant moment with contextually relevant content

Connect with real-world moments



Location



Time of Day



Cultural



Sporting events

OUTSMART

Simplicity can enable more impact

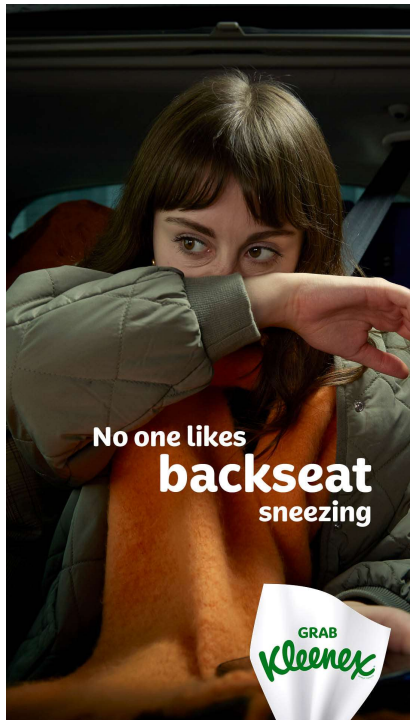


Out of Home Light Mode

Dark

Real world context for maximum impact

Real-World Locations



Roadside/Rail



Prox to Schools

Real-World Moments



Cold Weather



Rush Hour



Train Strikes

OUTSMART

Weather activations support sales

Temperature activated



Interactive display



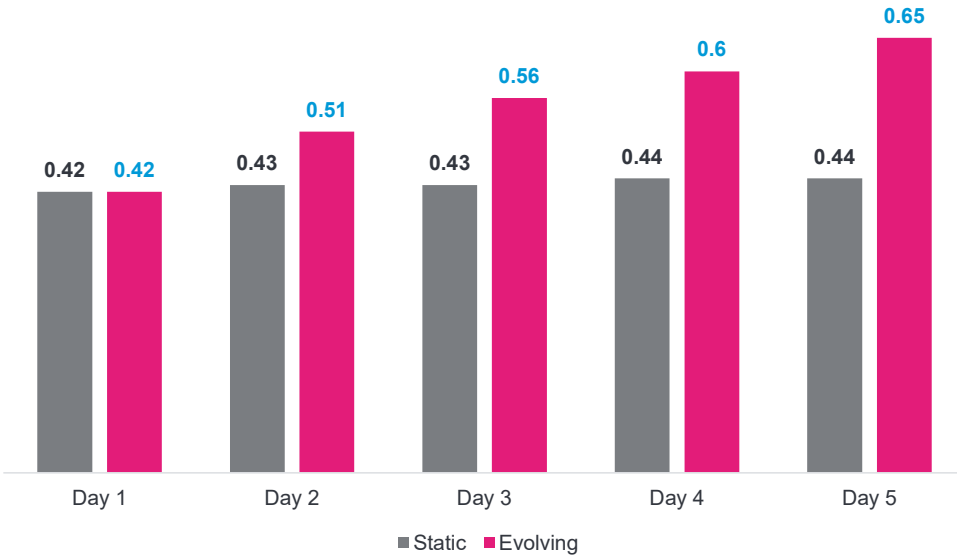
Cultural relevance in the moment

Dynamic content



OUTSMART

Evolving creative increases memory encoding

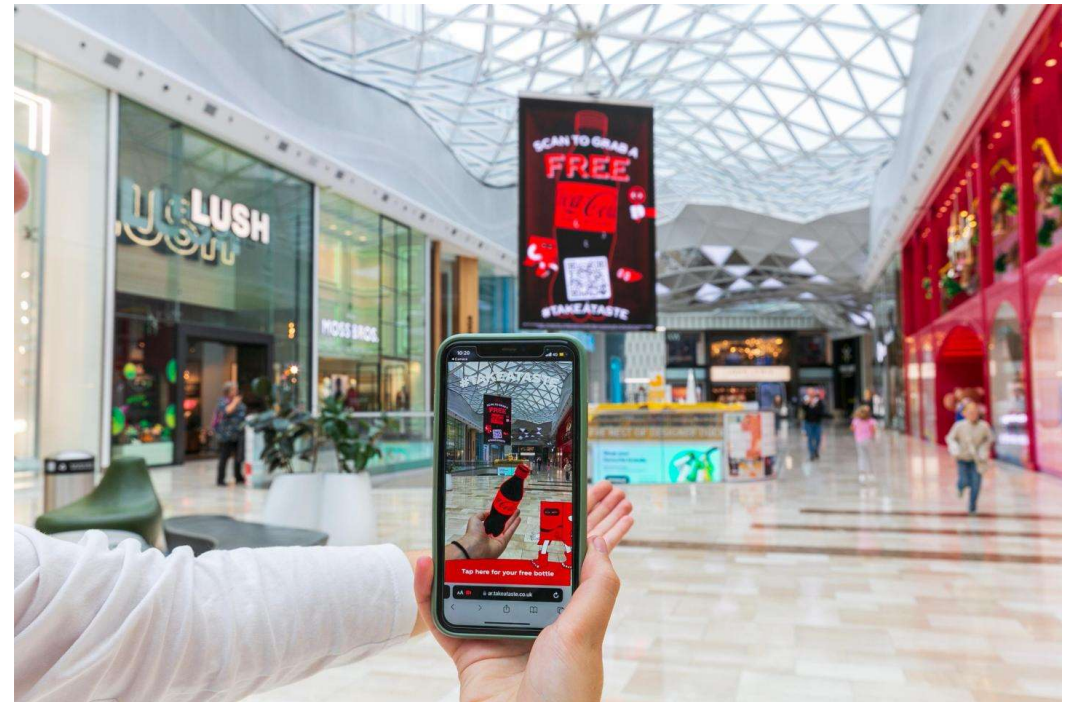
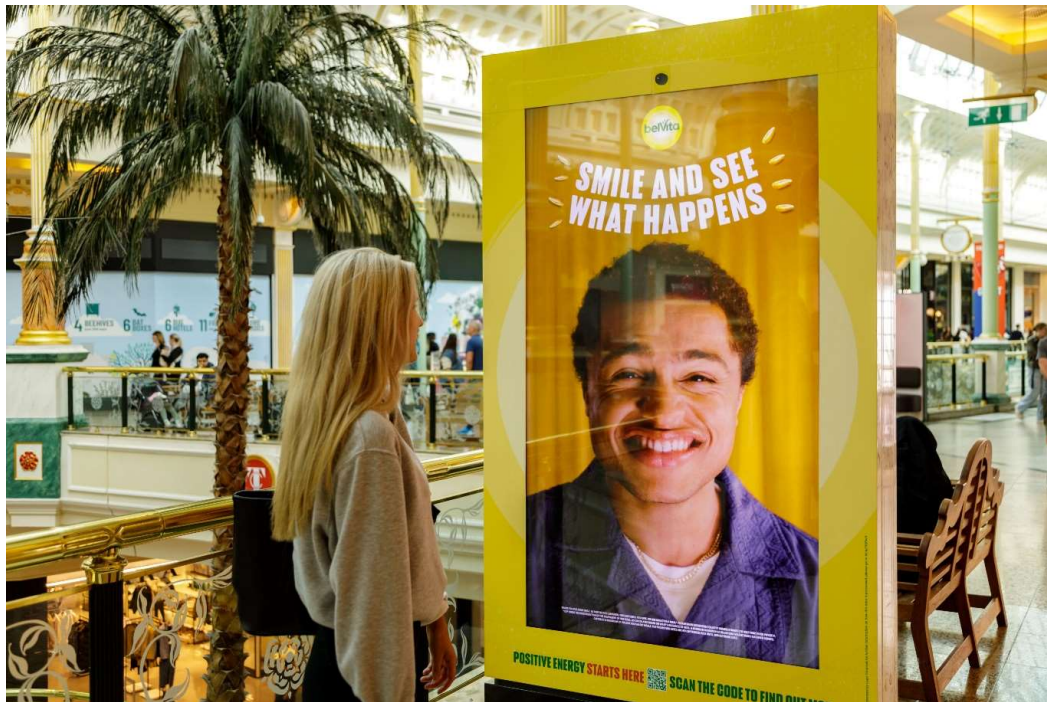


OUTSMART

A digital out-of-home (OOH) advertisement for Gousto is displayed on a screen in a city street. The ad features a vibrant image of a hand holding a piece of curry over a bowl of food. The text on the ad reads: "FRIDAY DOESN'T OWN CURRY NIGHT" and "Choose from over 60 recipes every week". At the bottom, it says "GIVE IT SOME" and "gousto". The background of the ad is a blurred city street with pedestrians.

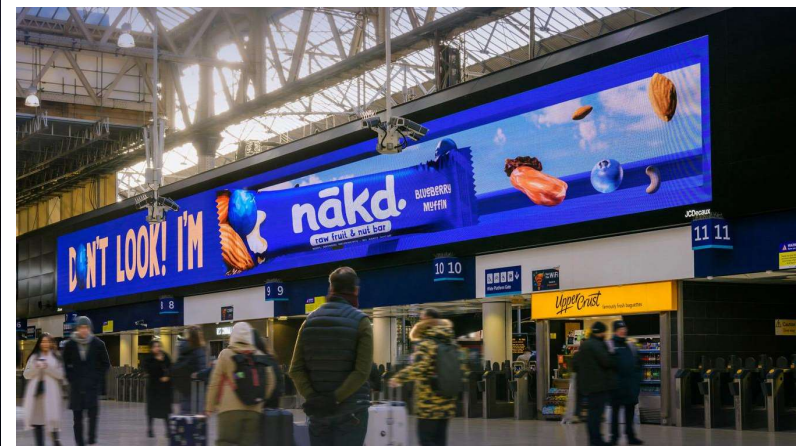
38%
higher impact
when using
changing or
evolving digital
OOH creative

DOOH allows more interaction with audiences



OUTSMART

3D at scale in environments with full motion



OUTSMART

The power of innovation

OUTSMART

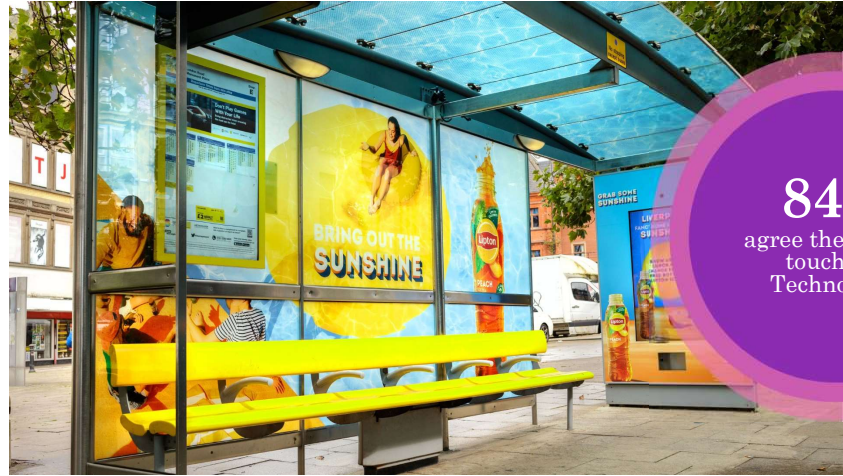
OOH is the ultimate creative canvas



90%
agree using lighting/illumination effects make ads more noticeable¹



91%
agree using 3D customisations / projections are more noticeable¹



84%
agree they notice touchless Technology¹

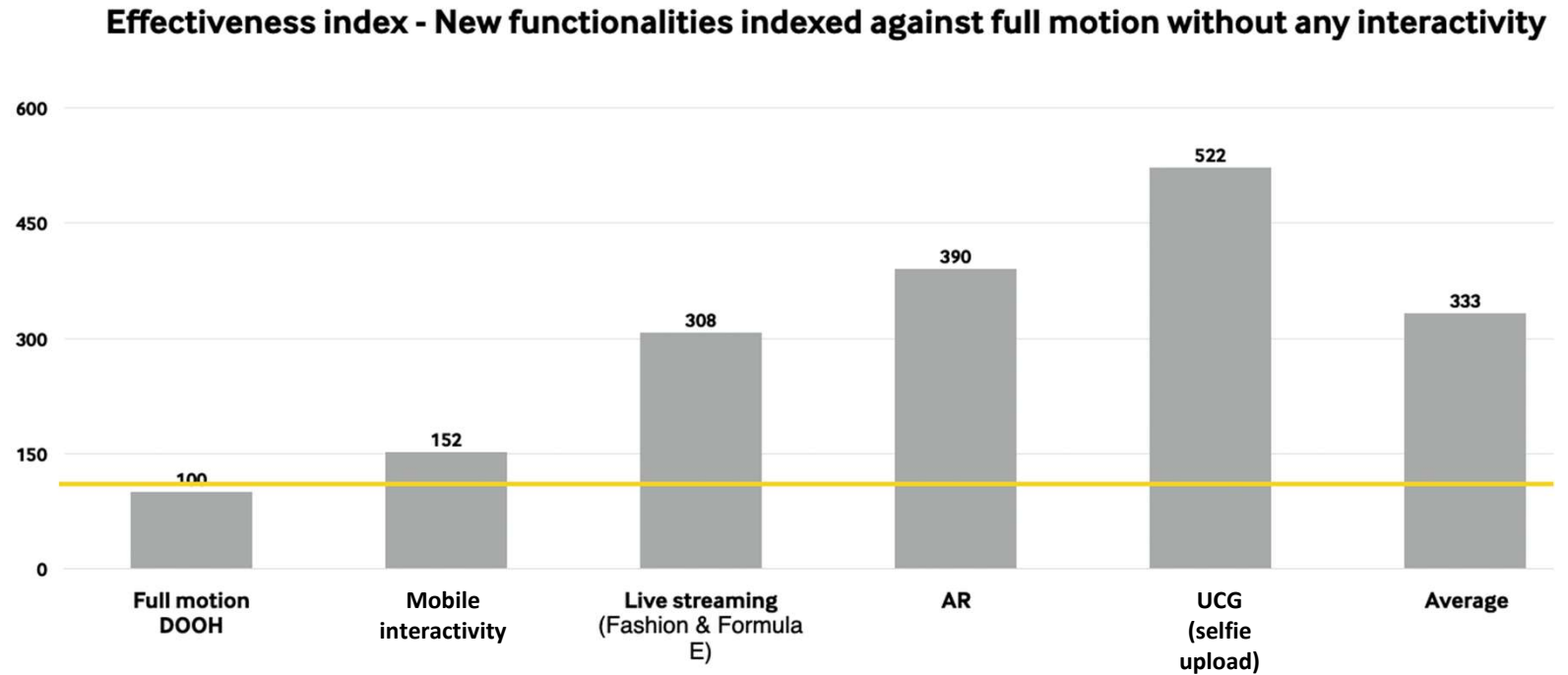


>5.2m
reach with long form OOH²

1. OCS 2021.
2. Meltwater, Q1 2020.

Technology plays a key part in engagement

Full motion delivers 2.5x memory encoding and emotional intensity of static advertising¹



Special builds drive fame and talkability





OOH is constantly innovating – 3D is a great example



3D
anamorphic

3D at scale

3D in real
time



Innovative OOH creates shareability unlike other channels



adr13nsanmiguel ✓
Leicester Square, Central London

1/4

ANDALUSIAN CRUSH
PICASSO
Andalucía

6,108 likes

adr13nsanmiguel "Never in my life have I lived a place more delicious than Andalucia and I will never be able to find another that equals it."
Washington Irving.
A pleasure to do Andalucia outside,
@juanmamorenobonilla!
🌿🌿🌿 #AndalusianCrush



Lewis Capaldi ✓
@LewisCapaldi

ffs whoever is in charge of the billboards at netflix needs firing

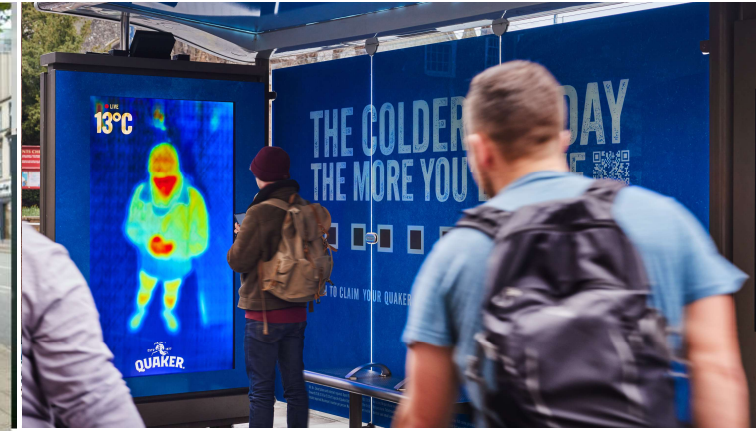
LEWIS CAPALDI
HOW I'M FEELING
APRIL 5 | NETFLIX

4:37 PM · Mar 28, 2023 · 6.2M Views

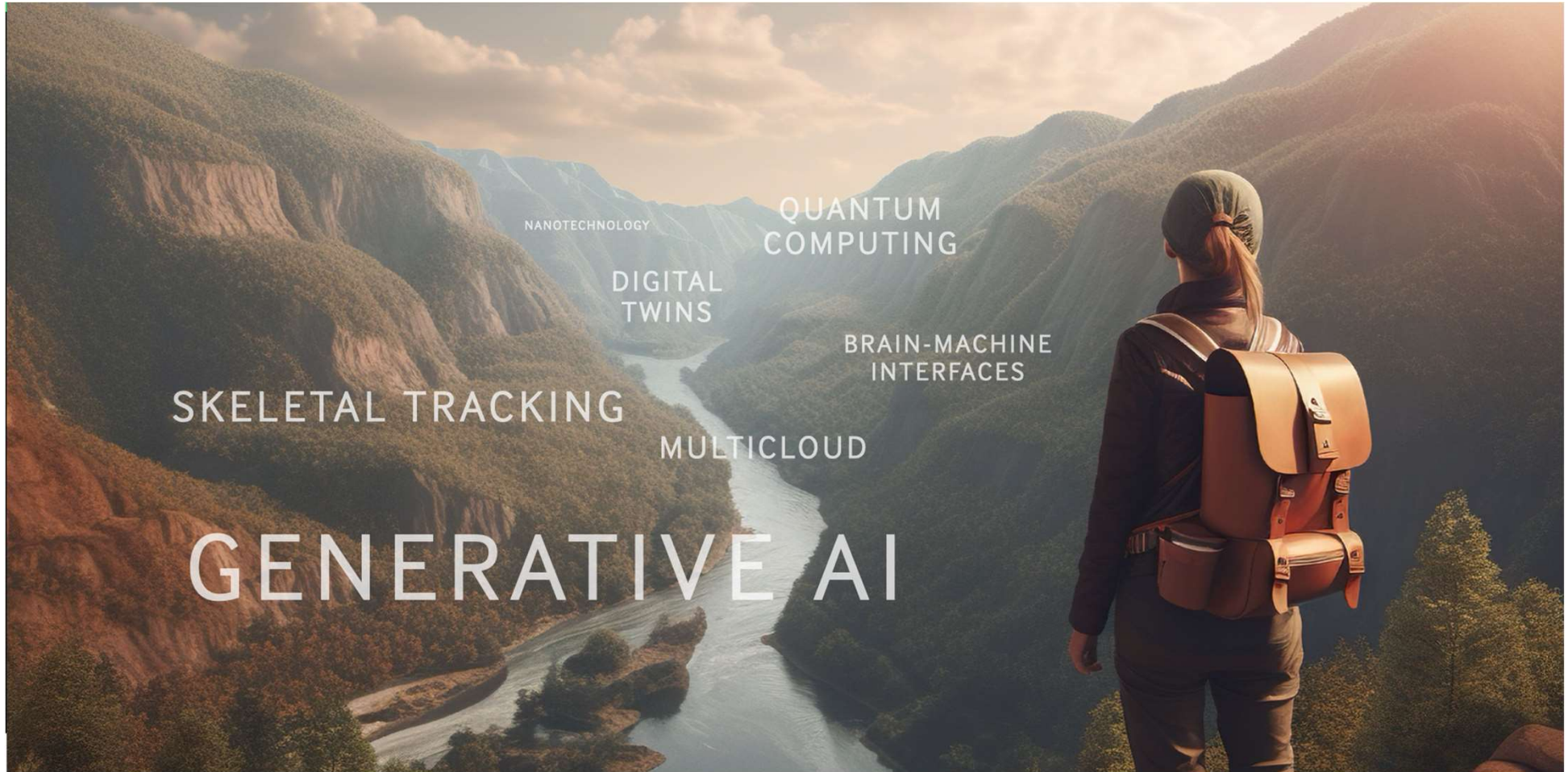
3,309 Retweets 464 Quotes 94.8K Likes 519 Bookmarks

60% of the social chatter of the John Lewis Christmas ad for 0.24% of the media spend

Innovation enables positive impact on local communities



Horizon scanning: driving OOH forward



In summary

In summary

- Poster design is fundamental for successful OOH campaigns – designed with the channel in mind
- DOOH unlocks more capabilities, enabling brands to communicate with relevance
- Special activations drive fame and talkability. OOH is the ultimate creative canvas



OUTSMART

Conclusion: “OOH Fact or Fiction”

Tim Lumb

Director

Outsmart



Fact or Fiction

Tim Lumb, Outsmart

OUTSMART

The background features a complex, abstract design of glowing, overlapping lines and shapes. The colors range from deep magenta to bright green, creating a sense of motion and depth against a dark background. The lines are thick and have a soft, ethereal glow, with some appearing as solid bands and others as more delicate, web-like structures.

OOH has a wider social purpose funding public services

Sustainability accelerated by media owner control over the supply chain and end-to-end operations.

Route tell us who sees OOH and gives robust audience measurement

Recognise there is room for improvement on MMM

We are working to improve access to OOH data

Wealth of evidence-based best practice

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Close

Bobi Carley

Head of Media and Diversity & Inclusion Lead

ISBA

