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THE MOMENTS OF TRUTH

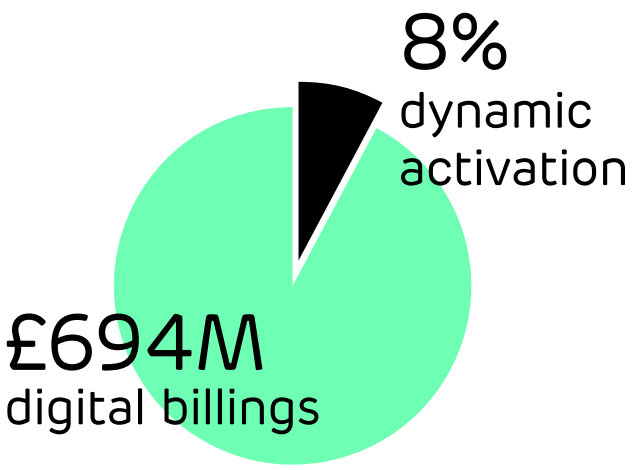
#themomentsoftruth

BACKGROUND

Out of Home (OOH) has always been an effective medium due to its ability to reach millions of consumers in the right place, at the right time, with the right message. Reach and relevance are its key strengths. With Digital Out of Home (DOOH) now reaching over two thirds of the GB population each week, this growth has added hugely to the medium's capability to deliver relevant communications at scale.

DOOH affords advertisers the opportunity to not only target specific moments of relevance, but also adapt creative messages dynamically to reflect time, location, weather and live data sources, such as countdowns, stock levels or price alterations.

Amid the backdrop of increased DOOH investment from both advertisers and media owners, **"The Moments of Truth"** research was designed to inform and educate the marketing industry on how dynamic DOOH maximises DOOH performance and consumer response. The challenge being that despite DOOH accounting for over 50% of all OOH revenue and worth almost **£700m billings** in 2019 (2019, Outsmart), it is estimated that only about **8%** of this is dynamically activated.



"Marketing is in the grip of its own "fundamental attribution error" where we assign too much value on consumer personalities (audience) over context / situation.

Marketing should be giving as much focus to the target context as the audience to generate the most successful campaigns".

Richard Shotton
Founder of Astroten
& Author of The Choice Factory

Therefore, in an attempt to overcome this missed opportunity, an unprecedented collaborative three-stage research study was commissioned by **Clear Channel, JCDecaux UK and Posterscope.** This was first presented at a London event on the 3rd March 2020 with various guest speakers from across the industry.

THE MOMENTS OF TRUTH STUDY – RESEARCH TO REALITY

The Moments of Truth study, was a combination of three different research techniques, which collectively would provide not only an academic understanding of contextually relevant messaging in DOOH, but also offer an understanding of how these academic insights present as real world actions.

The study was timed to coincide with the imminent launch of the updated Route OOH industry currency. Route is moving towards the measurement of digital spot level audiences, alongside seasonality, which provides far more accurate and granular DOOH moment planning opportunities.

The three research techniques undertaken were:

Stage 1 – Neuroscience:

To measure brain response to contextually relevant DOOH messages.

Stage 2 – Ad Recall:

Eye-tracking research to measure DOOH fixations, advertising recall and creative rating.

Stage 3 – Sales Effect:

Test and control sales uplift studies to understand the direct sales response.

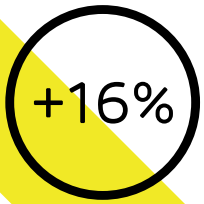
Topline Findings

Key findings from this pioneering study reveal that consumer brain response is **18%** higher when viewing relevant content in digital Out of Home campaigns, which in turn leads to a **17%** increase in consumers' spontaneous advertising recall. And, ultimately it demonstrated that dynamic digital Out of Home campaigns can deliver a **16%** sales uplift.

When combined, these findings give an overall campaign effectiveness uplift of **+17%.**

Neuroscience

Ad Recall



Sales Effect

The world's most comprehensive study into the power of relevancy in Out of Home reveals that Digital Out of Home campaigns that use contextually relevant messaging achieve an average **+17%** more effective audience response.

+17%

UPLIFT IN DIGITAL OUT OF HOME EFFECTIVENESS

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STAGE 1: MEASURING BRAIN RESPONSE

This first stage was conducted using neuroscience specialist, Neuro-Insight, and sought to understand the neurological impact of:

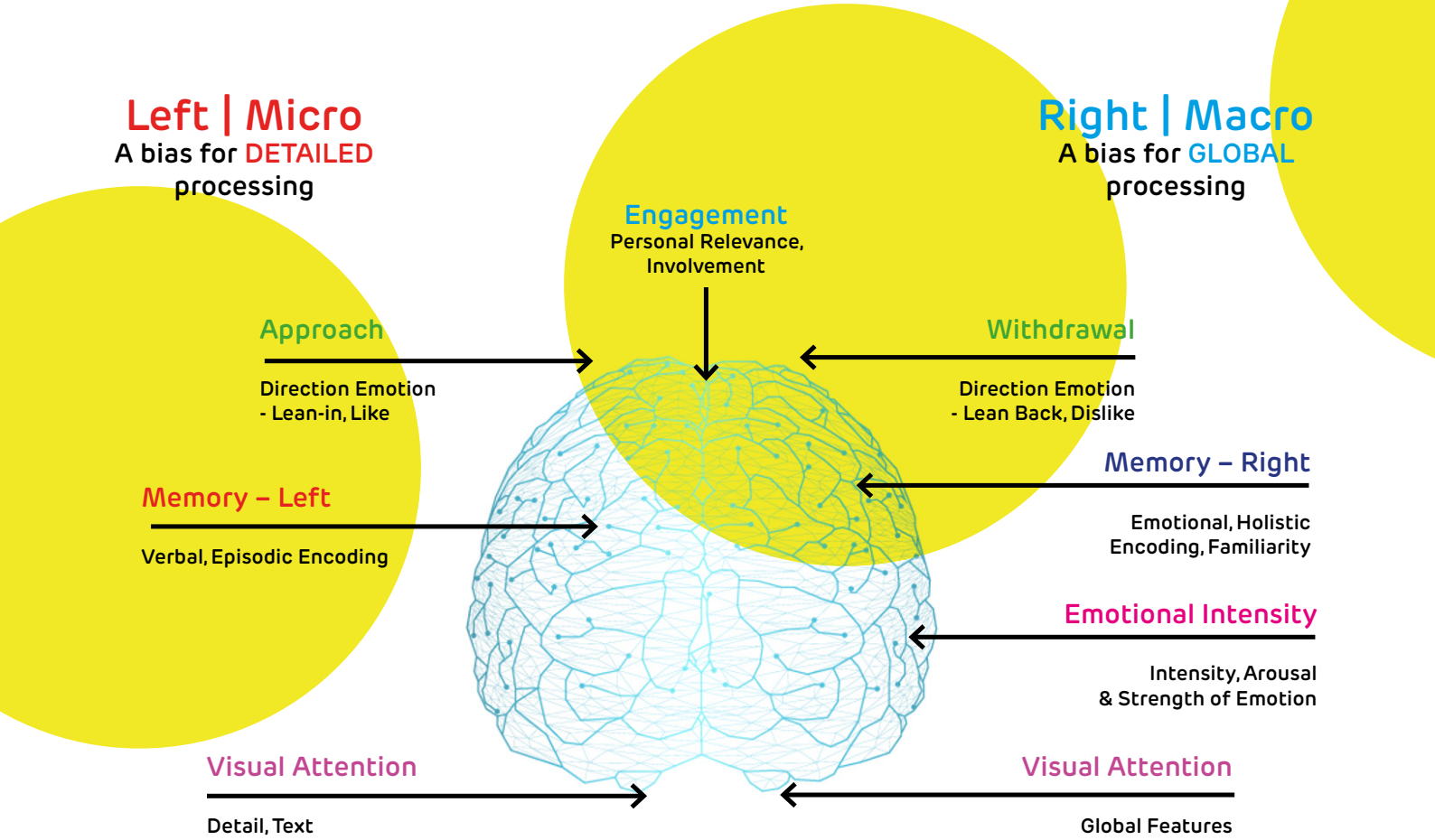
Relevant Moments: Seeing advertising at relevant moments.

Relevant Content: Seeing advertising that has an explicit call out to relevant content e.g. the weather, location, time of day or a live update.

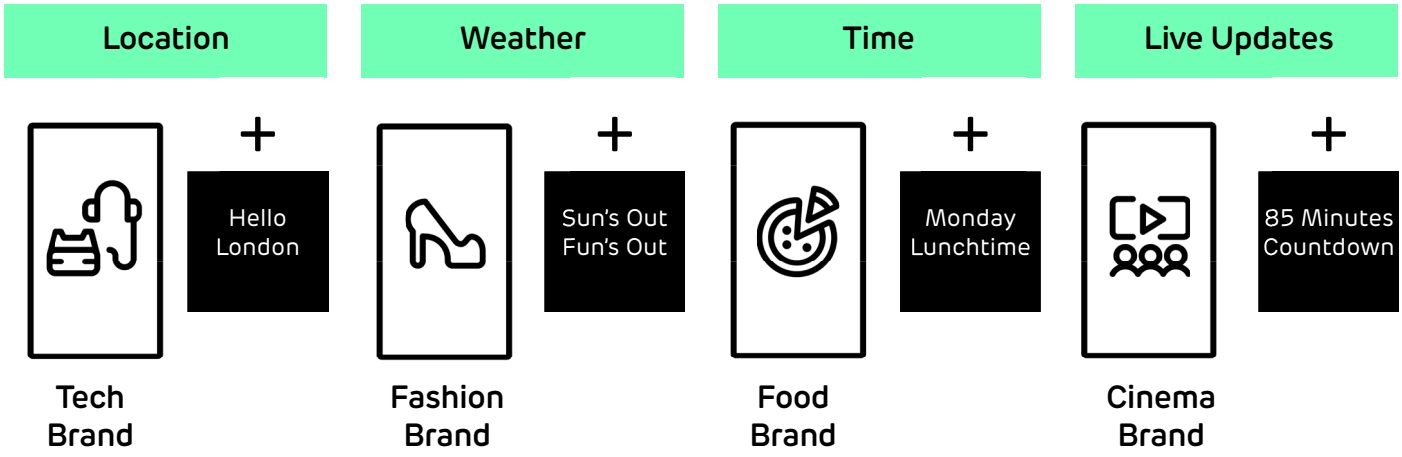
Unlike other media, there is little to no content surrounding DOOH advertising, consequently, the advertising is often consumed passively. Therefore, a methodology that measured the subconscious was required. Neuroscience was the obvious choice.

Neuroscience Methodology:

- 160 participants (matched on age, gender and presence of children) took part in test and control research at Neuro-Insight's London Bridge studios and were exposed to content on a full-sized portrait DOOH screen.
- Brain responses were measured using the established neuroscience technique of Steady State Topography (SST) that measures several areas of the brain each responsible for different cognitive functions such as long-term memory encoding, direction of emotion (i.e. Approach) and engagement.
- To balance any user bias, the advertising content for both test and control groups featured a range of brands across 10 different categories namely Entertainment, Alcoholic Drinks, Non-Alcoholic Drinks, Telecoms, Technology, Fashion, Supermarkets, Homeware, Food and Electronics.

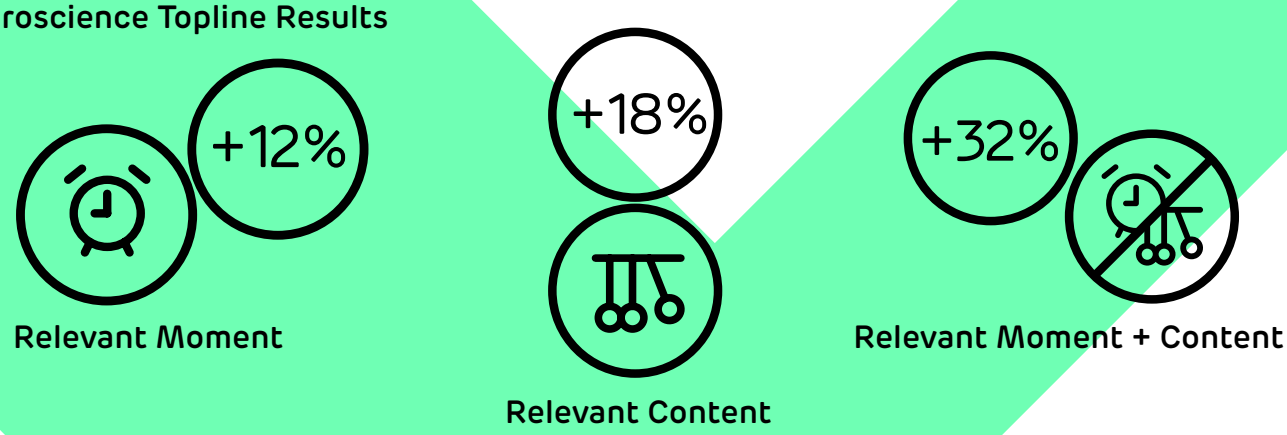


- Test advertising varied by brand and was displayed at the appropriate moment and/or featured a dynamic call out relevant to the location, weather, time or a live update (e.g. a countdown) at the specific point of exposure. Control content was identical to the test stimuli, but was either displayed at a less relevant moment, or did not contain a call out to the dynamic content.



- To replicate the effects of different moments, fieldwork was conducted evenly across weekday mornings (Mon – Wed) and weekend afternoon/early evening (Fri/Sat).
- Exposure to advertising messages lasted approximately three minutes, and to measure the impact of seeing multiple dynamic ads (e.g. brand X - 1st exposure Weather, 2nd exposure Time, 3rd exposure Location) vs. multiple generic ads, respondents repeated the research exercise 3 times. Each set of advertising content was interspersed with TV content to allow the brain to have a "rest period" between the viewings of OOH content.
- All advertising content was in the format of a 10-second static advert without animation effects. The purpose of the research was to measure the brain's response to contextually relevant content, and therefore variables such as motion were excluded from the study.
- Each test and control advertising stimulus reported on the peak level of brain response. This was measured for both individual brain metrics (such as Approach / Withdrawal) as well as a combination of multiple brain metrics to report on the overall levels of brain response.
- Individual brand results were all combined in the analysis to create robust averages.

Neuroscience Topline Results



Overall the neuroscience research revealed 3 key findings and recommendations for advertisers: -

1) **Relevant Moments -** Categories or products that have relevant moments to tap into, should exploit this opportunity as average brain response was **+12%** higher at more relevant moments.

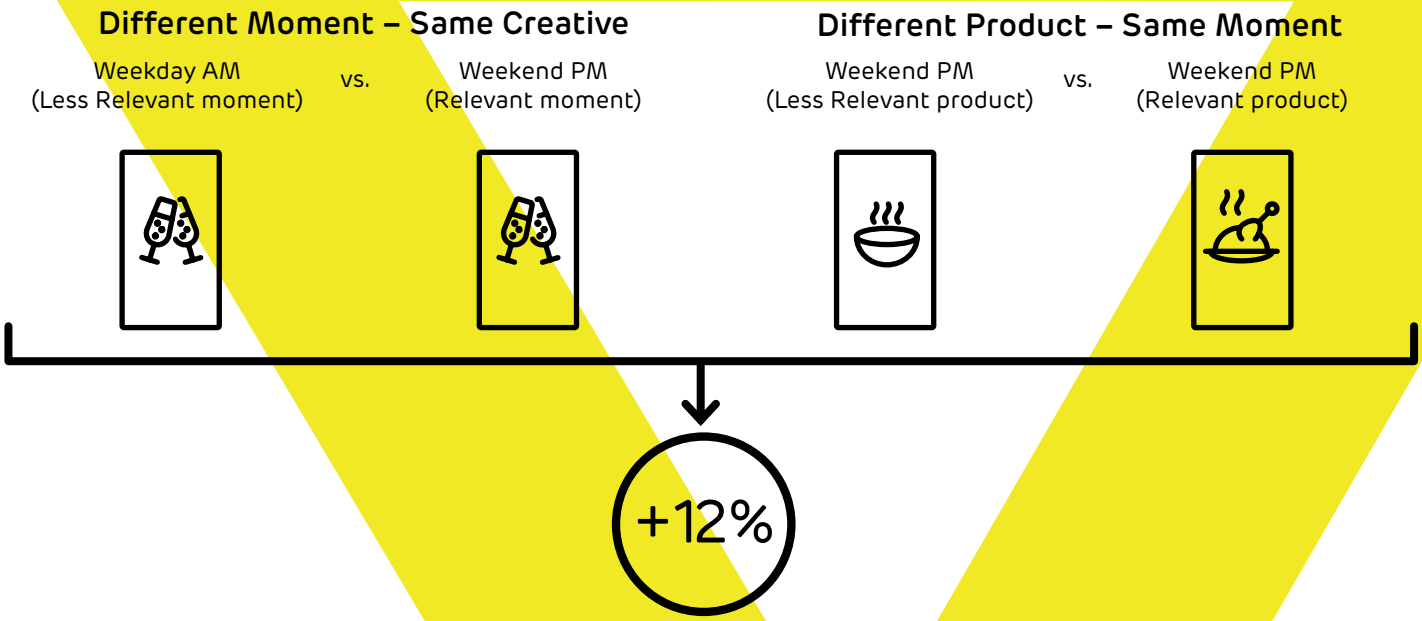
2) **Relevant Content -** All advertisers, regardless of category, should adapt their content to feature dynamic relevant call outs, as relevant content opportunities drove an average **+18%** increase in brain response.

3) **Relevant Moments & Content -** Where possible and appropriate, a combination of advertising at both relevant moments and featuring relevant dynamic content should be considered as these drove the highest brain response, delivering an average increase of **+32%.**

This paper now reports on each of these 3 areas in more depth to understand the importance of relevancy in driving higher levels of brain response.

1) Relevant Moments

Displaying advertising at the most relevant moment (either by time/day of week) drove an average +12% increase in brain response.



Advertising at relevant moments was measured and reported in two different ways (different moment/same creative and different product/same moment) and when combined demonstrated a **+12%** increase in average brain response.

For participants who viewed identical creative at a more relevant moment, average brain response increased by **+14%.**

For example, a category like Alcohol, viewed on a Monday to Wednesday weekday morning (less relevant moment) vs. a Friday/Saturday afternoon (more relevant moment). Or a business to consumer brand being viewed on a weekday morning (more relevant moment) vs. a Friday/Saturday afternoon (less relevant moment).

Participants viewing very similar creative, but with the product adapted to be more relevant to the moment, increased average brain response by **+10%.**

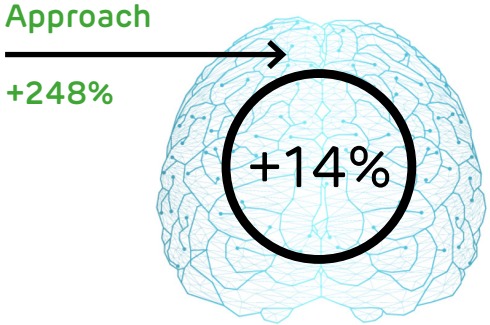
For example, a supermarket/food brand featuring a "ready meal" product image viewed on a Friday/Saturday afternoon (less relevant product) vs. a "roast dinner" product image (more relevant product). The same process was repeated on a Monday to Wednesday morning with the relevant products now switched. i.e. "ready meal" more relevant on a weekday.

The largest increase was seen for the brain metric of Approach which is a measure of positive emotion. For this brain metric, when identical content was viewed at a more relevant moment it elicited a **+248% stronger response.**

"Our brains are highly selective and will only process and encode information they deem important or relevant to that moment. Therefore, the more relevant the moment in which the content is consumed, the stronger the levels of processing will be. In addition, if content feels more congruent/less jarring, the emotional response will also be higher – indicating a more positive future action".

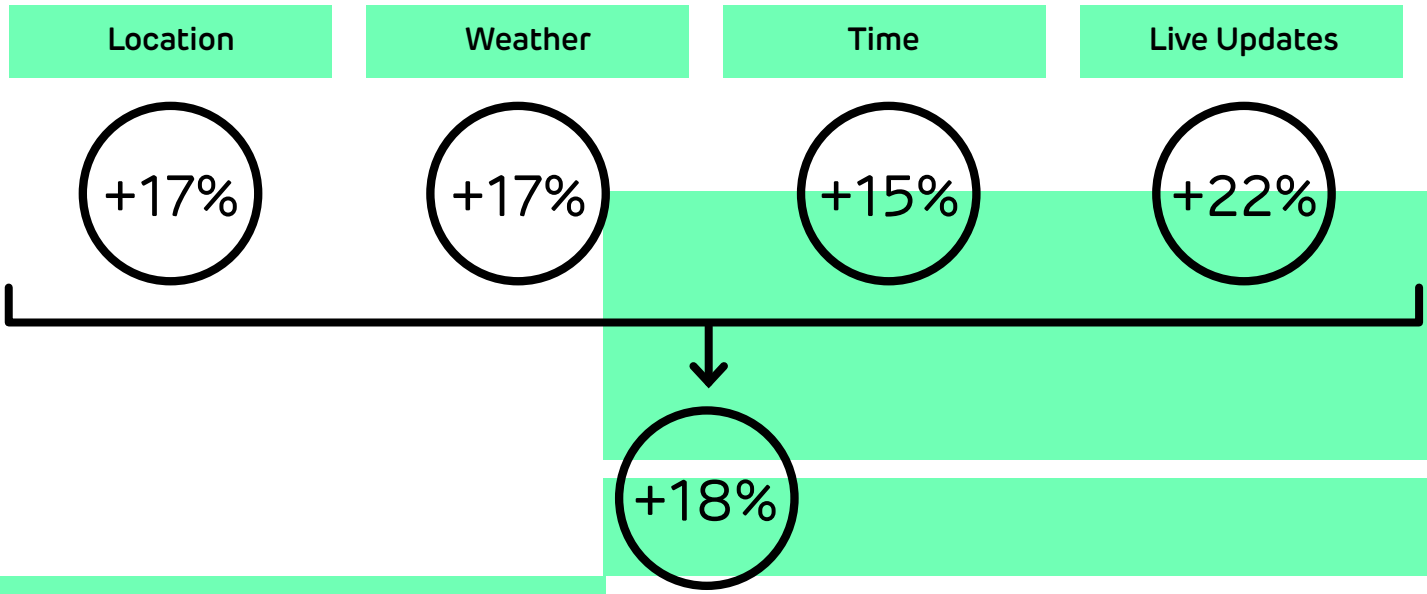
Shazia Ginai
CEO, UK
Neuro-Insight

Generic content less relevant moment
vs. Generic content relevant moment



2) Relevant Content

Displaying unique and relevant dynamic content based on either time, location, weather or live updates, drove an average **+18%** increase in brain response.



The research proved that across each of the 4 dynamic triggers (location, weather, time, live updates), average brain response was higher for test content with a relevant call out vs identical control content that did not feature an explicit call out

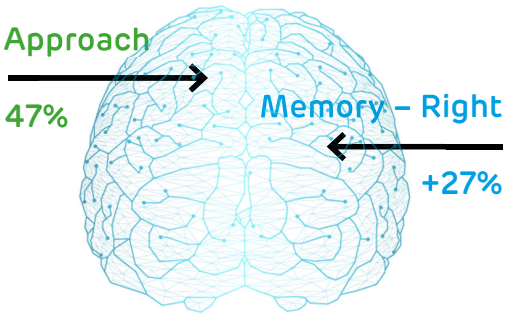
Different triggers elicit responses in different areas of the brain

A key learning in our understanding of relevant content was that while all dynamic content elicited a stronger brain response (average **+18%**) than its non-dynamic counterpart, the area of the brain where these differences were observed varied significantly depending on the dynamic content in question.

"Location, for example, over indexed for right brain memory encoding which amongst other things, is responsible for the retrieval of previously stored information and indicates whether something feels familiar e.g. in this case, London. Pre-existing associations people will have with London are driving the strong and positive emotional response".

Shazia Ginai
CEO, UK
Neuro-Insight

Difference (%) in brain response for each metric Relevant location vs. Generic content



The use of multiple dynamic content helps to "re-engage the brain"

Another significant learning was the benefits of using multiple dynamic content at different exposures which helped to maintain higher levels of brain response and **reduced wear-out by 1/3.**

Exposure to multiple, differing pieces of dynamic content resulted in lower levels of ad wear-out when compared to viewing the same non-dynamic content multiple times.

The neuroscience explanation is that the variations in the content act as a way of **"re-engaging the brain"** with new information.

"Our brains are lazy – once they think they have got the point of something they will stop trying to follow it – what they need is constant stimulation to keep them engaged. New information, or slight changes to something familiar, will give the brain a reason to re-engage with a piece of content".

Shazia Ginai
CEO, UK
Neuro-Insight

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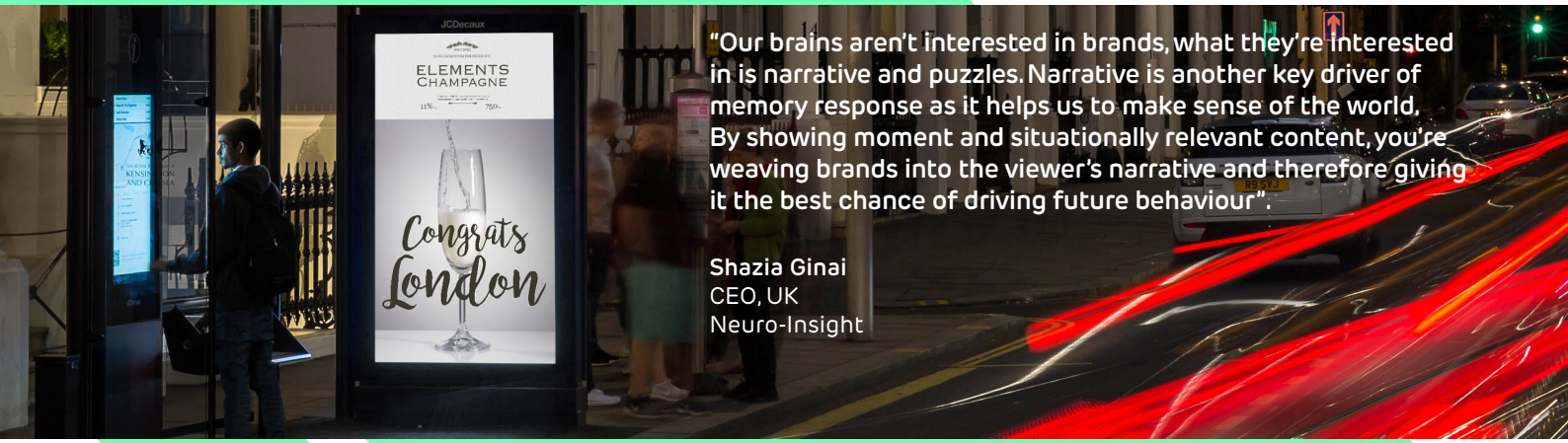
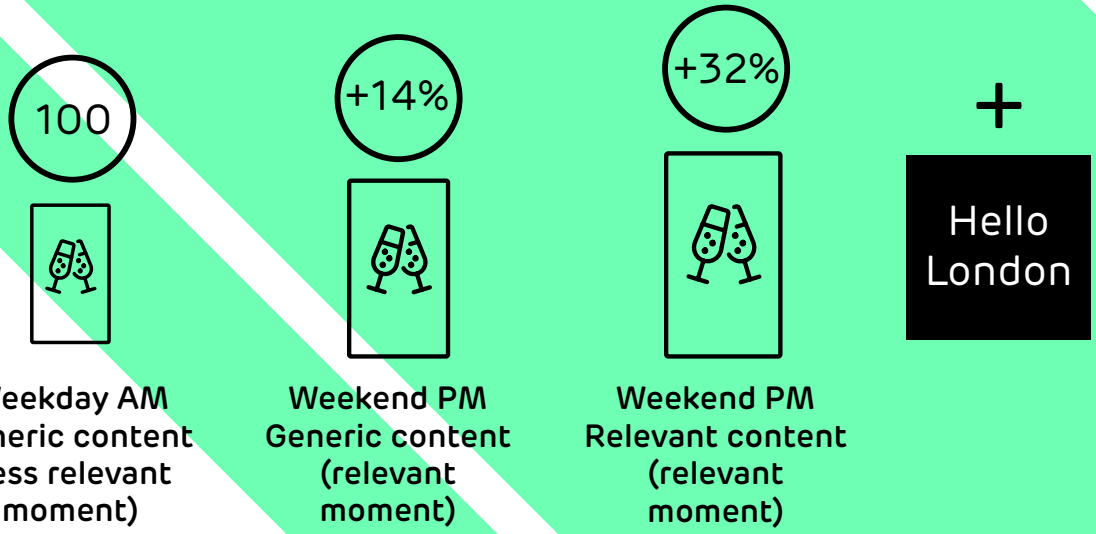
3) Relevant Moments & Content

The combination of seeing relevant content at a relevant moment increased average brain response by **+32%.**



"Our brains aren't interested in brands, what they're interested in is narrative and puzzles. Narrative is another key driver of memory response as it helps us to make sense of the world. By showing moment and situationally relevant content, you're weaving brands into the viewer's narrative and therefore giving it the best chance of driving future behaviour".

Shazia Ginai
CEO, UK
Neuro-Insight



Weekday AM Generic content (less relevant moment)

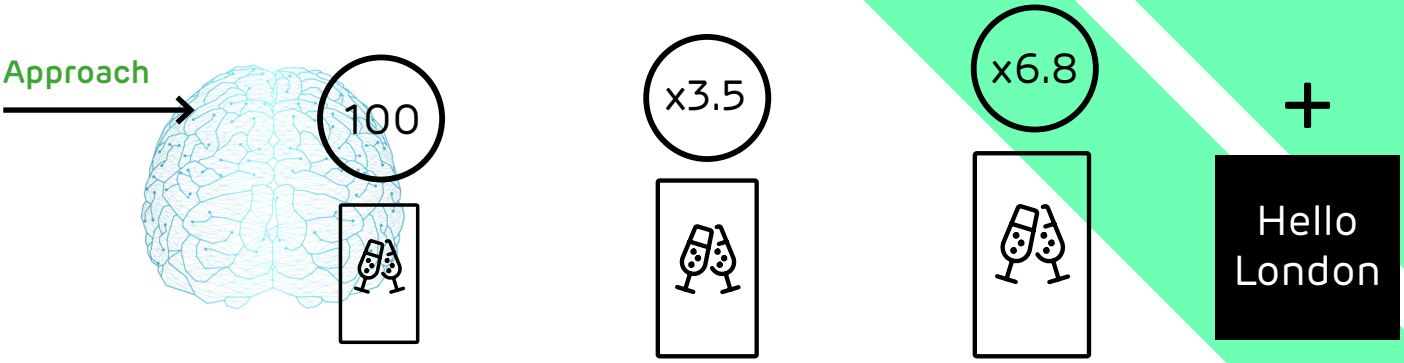
Weekend PM Generic content (relevant moment)

Weekend PM Relevant content (relevant moment)

The most significant increase in brain response was identified when creative was seen at both the relevant moment **and** with explicit reference to dynamic content.

This combined effect is logical, as individually, relevant moments and relevant content both stimulate the brain at a higher level - so one would naturally expect the combination of the two to illicit stronger effects.

The brain metric of Approach, which is a measure of positive emotion, saw the largest effect. When relevant content (e.g. featuring a location call out) was viewed at a more relevant moment, it elicited a **6.8 x stronger level of Approach** – showing that this added level of relevance increases positive emotional response.



Weekday AM Generic content (less relevant moment)

Weekend PM Generic content (relevant moment)

Weekend PM Relevant content (relevant moment)

STAGE 2 – AD RECALL

Having established that advertising at the most relevant moment and/or featuring dynamic content increases brain response, a second research phase was devised to understand the impact of these same factors on:

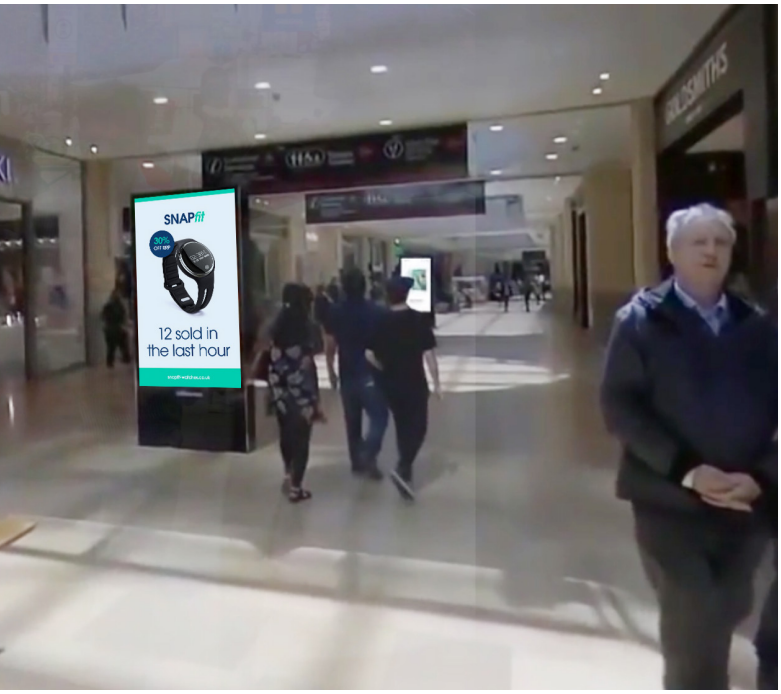
a.) **Likelihood to look at advertising messages**

b.) **Likelihood to recall advertising messages**

c.) **Likelihood to rate the creative more highly**

This research stage measuring advertising recall and brand/creative rating was conducted by research agency Research Bods using their online webcam eye-tracking software and a post survey questionnaire.

Methodology

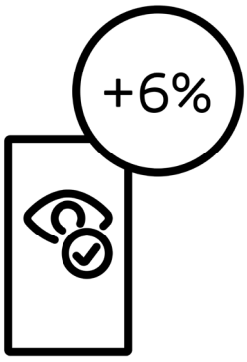


- 280 respondents viewed walk-through footage of a shopping mall with screens each featuring a different brand's advertising.
- 2 walk-through scenarios were created, with 50% respondents viewing the video on a Monday and 50% on a Saturday, ensuring that different moments were captured.
- Half the respondents were exposed to a test advert for each brand (featuring content relevant to the moment or referencing a dynamic element such as time, location or a countdown) and half were exposed to an identical control advert without this relevancy.
- Eye tracking recorded whether respondents looked at the advertising screens for each brand and how long they looked at it for. This was followed by an online questionnaire to measure advertising recall and brand/creative rating.
- To balance any user bias, the advertising content used featured a range of brands across 6 different categories namely Entertainment, Alcoholic Drinks, Electronics, Supermarkets, Food and Motors

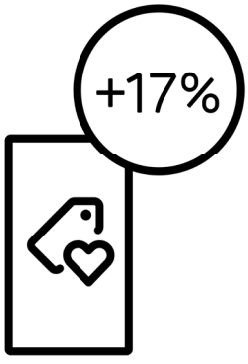
Results

Mirroring what was seen in the neuroscience research, the second stage demonstrated that relevant DOOH messaging (i.e. DOOH ads displayed at relevant moments with explicit reference to relevant content) increased ad attention, spontaneous ad recall and creative ratings when compared to non-relevant DOOH advertising.

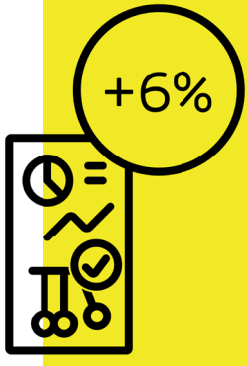
Relevant Adverts (Test) vs. Non-Relevant Adverts (Control)



Time spent looking at advert



Spontaneous Ad Awareness



Average Creative Rating

Clear Channel JCDecaux Posterscope

STAGE 3 – SALES EFFECT

A third and final research stage was devised to understand if we could link our more research-based findings in stages 1 & 2 to advertiser benefits as they present themselves in the "real world." To be more specific, to prove that the application of contextually relevant DOOH messaging actually drives more sales.

Methodology

This was conducted using a meta-analysis across multiple effectiveness studies, each of which monitored the link between in-store sales and the use (or absence) of DOOH advertising.

This methodology used store matching and brand sales data for 4 different advertiser campaigns in the FMCG (x2), Retail and QSR categories.

Three campaigns featured on Tesco point of sale DOOH screens and were evaluated using Nielsen store sales data and one campaign featured on high street DOOH and was evaluated using client store sales data.

Sales uplifts compared stores featuring:

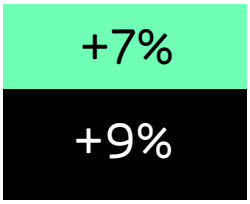
- No OOH (control)
- Stores supported with normal non dynamic DOOH
- Stores supported with DOOH featuring dynamic content (time, location or weather)

Results

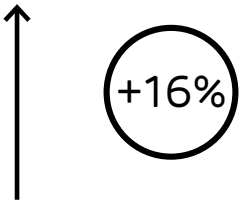
Overall a **+16%** increase in sales occurred when applying a Dynamic DOOH campaign versus a control of no OOH. This is versus a benchmark of a **+9%** average increase in sales when applying a traditional singular creative message campaign vs. no OOH.

Conclusive findings which demonstrate that not only does DOOH drive a sales uplift for advertisers, but by adding in contextually relevant messaging this can significantly improve the medium's effectiveness in driving consumer response.

Standard DOOH vs. no Ads



Dynamic DOOH vs. Standard DOOH



Dynamic DOOH vs. no Ads

"We have regularly utilised store and location data to tweak our messaging to be more relevant to consumers in proximity to store, the assumption being that this would see an increase in sales, and from the sales lift data we have absolutely seen this correlation ...

What we would like to understand further is the role dynamic can play in adding to your equity and brand storytelling messages and this is a space we continue to explore".

Julia Sparrow
Area Media Manager
Northern Europe
Mondelēz International

Conclusion

This landmark 3-stage research study has proved how the use of contextually relevant messaging in Digital Out of Home can lead to significant increases in the medium's effectiveness by an average of **+17%**

Brain response **+18%**

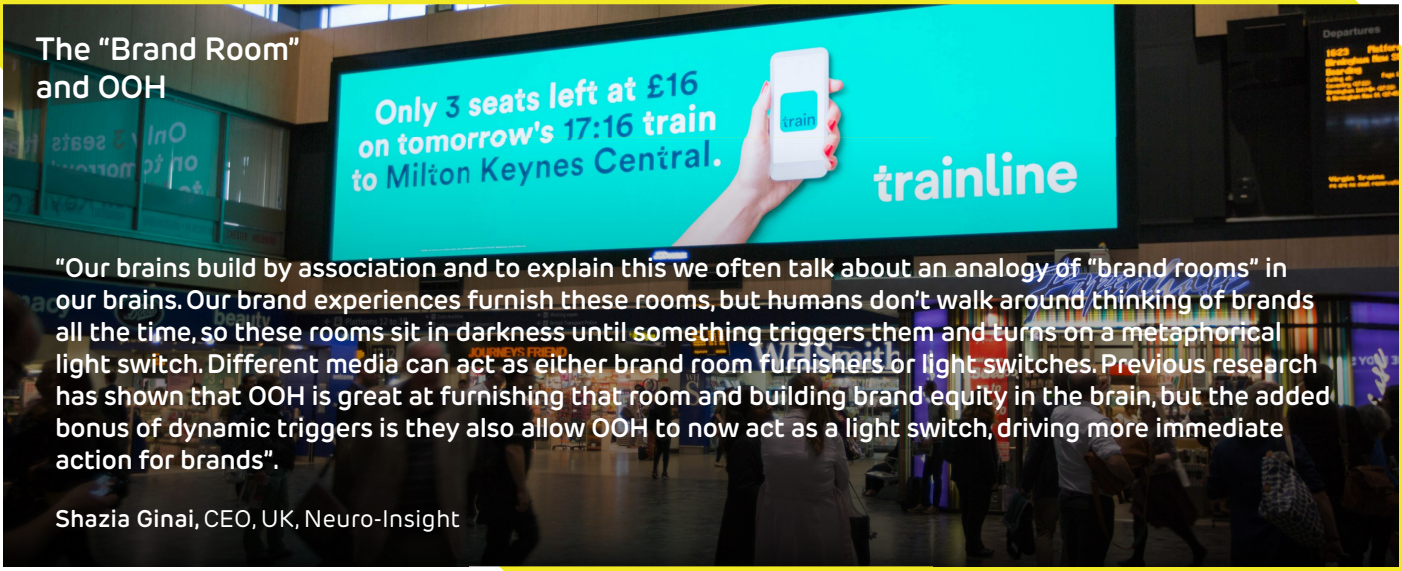
Spontaneous advertising recall **+17%**

Direct Sales Response **+16%**

We now have a far better understanding of how and why relevance is a key component of OOH effectiveness that can both build brand equity and drive brand actions.

This, combined with Digital Out of Home's ever-growing reach and future programmatic capabilities, provides significant opportunities to optimise performance.

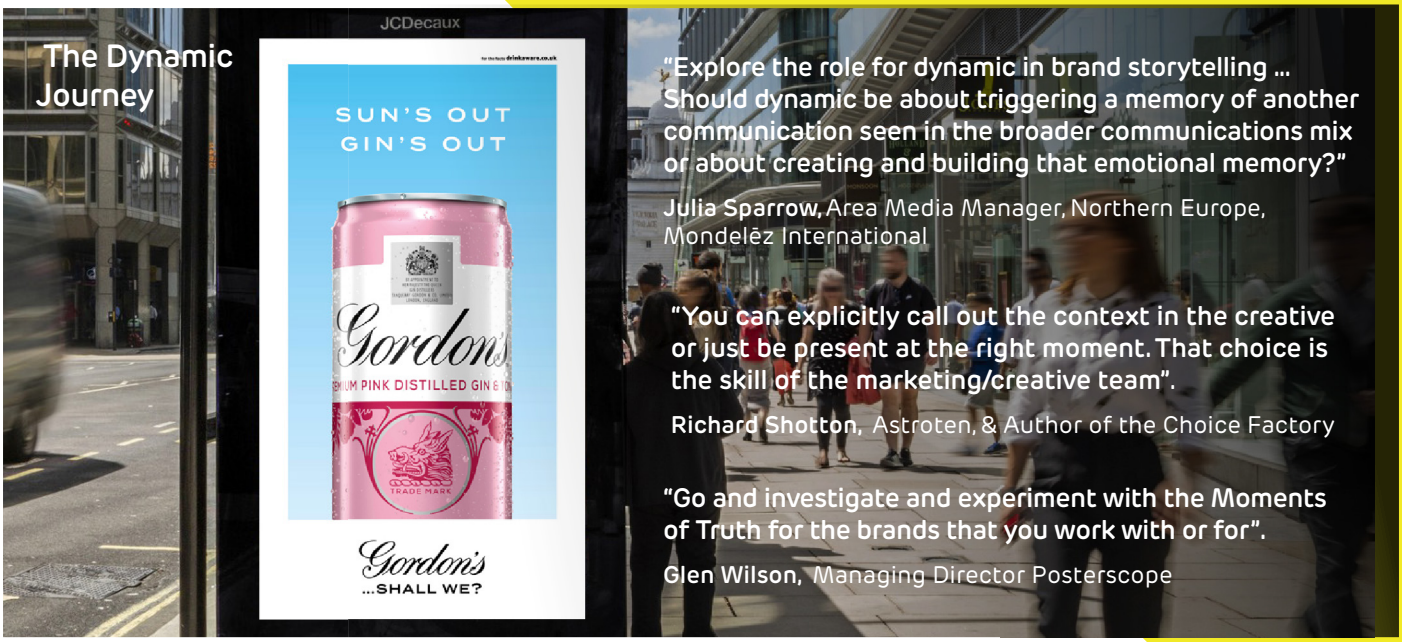
But the OOH industry is still in the early stages of a dynamic journey – It must encourage and collaborate with advertisers, media and creative agencies to both embrace and experiment with these opportunities and learn how to get the most from them.



The "Brand Room" and OOH

"Our brains build by association and to explain this we often talk about an analogy of "brand rooms" in our brains. Our brand experiences furnish these rooms, but humans don't walk around thinking of brands all the time, so these rooms sit in darkness until something triggers them and turns on a metaphorical light switch. Different media can act as either brand room furnishers or light switches. Previous research has shown that OOH is great at furnishing that room and building brand equity in the brain, but the added bonus of dynamic triggers is they also allow OOH to now act as a light switch, driving more immediate action for brands".

Shazia Ginai, CEO, UK, Neuro-Insight



The Dynamic Journey

"Explore the role for dynamic in brand storytelling … Should dynamic be about triggering a memory of another communication seen in the broader communications mix or about creating and building that emotional memory?"

Julia Sparrow, Area Media Manager, Northern Europe, Mondelēz International

"You can explicitly call out the context in the creative or just be present at the right moment. That choice is the skill of the marketing/creative team".

Richard Shotton, Astroten, & Author of the Choice Factory

"Go and investigate and experiment with the Moments of Truth for the brands that you work with or for".

Glen Wilson, Managing Director Posterscope

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