

# DARE TO DIGITISE

Proving the value of  
Digital OOH

By *Talon*

RISE OF DIGITAL OOH

TECHNOLOGY  
SCALED

OOH GROWTH &  
CONSOLIDATION

DATA & EVIDENCE  
ADVANCES

INTEGRATION OF  
CHANNELS

EXPERIENCE TREND

## THE REALITY OF OOH

Number of Panels	2014	2015	2016	2017	2018	2019	+ / - from 2014
6 Sheets - Roadside	79,055	75,244	66,486	62,100	61,943	60,036	-24% reduction
48 Sheets - Roadside	25,301	22,726	15,501	14,950	13,601	10,534	-58% reduction
96 Sheets - Roadside	1,822	1,667	1,563	1,290	1,127	873	-52% reduction
Rail 6 Sheets	5,280	4,143	3,216	2,851	2,911	2,994	-43% reduction
Underground 48 Sheets	1,857	1,746	1,690	1,701	1,724	1,779	-4% reduction
Digital 6 Sheets - Roadside	245	568	1,203	1,972	2,419	3,945	+1,610% increase
Digital 48 Sheets - Roadside	51	89	123	243	371	493	+966% increase
Digital 96 Sheets - Roadside	7	15	18	27	31	38	+542% increase

# THE EXPANDING REACH AND INFLUENCE OF DIGITAL OOH

11,024

Screens

+71%

Impacts in 2 years

76%

UK DOOH Reach  
every 2 weeks

57%

DOOH Revenue

70%

Weekly DOOH reach, outstripping  
commercial radio + ITV









## BRAND CONTENT OPPORTUNITIES



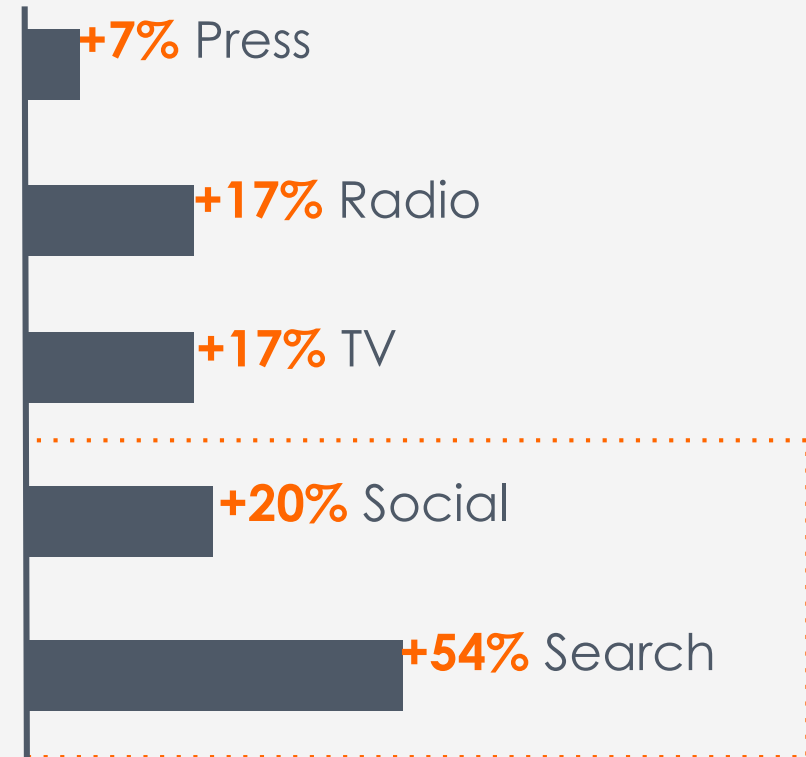
SMARTER AS STANDARD

*Talon*

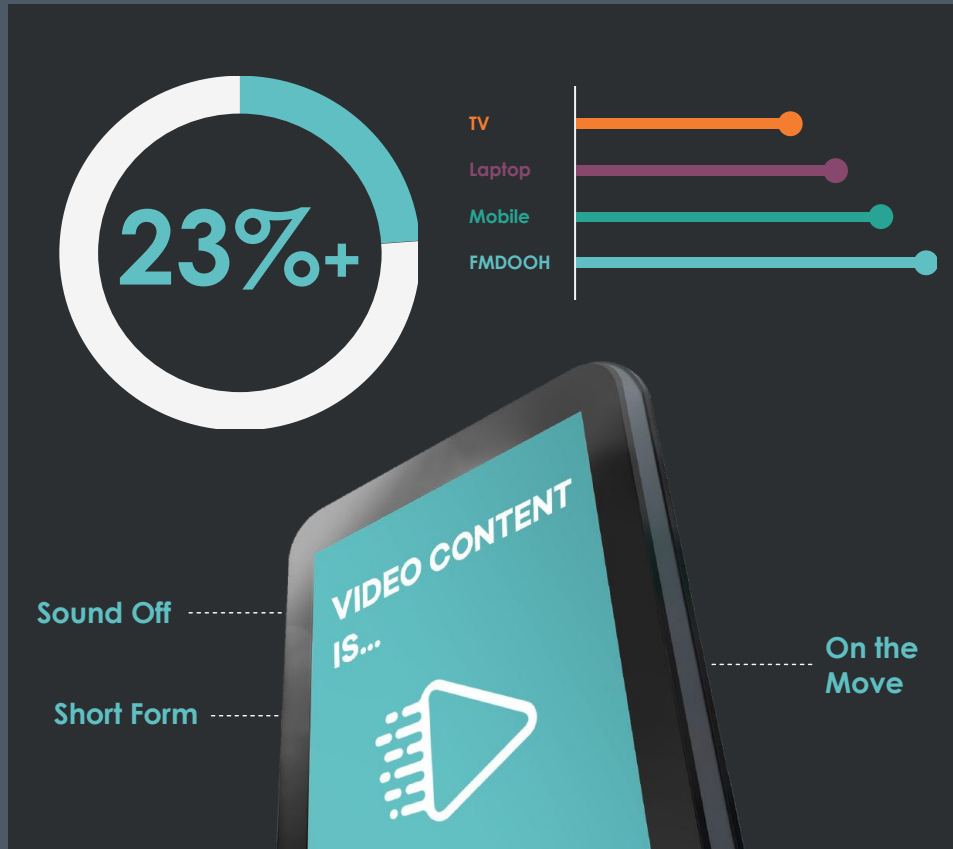
## AMPLIFYING AND INTEGRATING WITH DIGITAL



OOH works to amplify other channels & boost effectiveness



## BETTER TOGETHER – THE 4TH SPACE RESEARCH SHOWS +23% UPLIFT IN BRAND METRICS



INTRODUCING

# THE 4TH SPACE FOR VIDEO ADVERTISING

#The4thSpace

By *Talon*

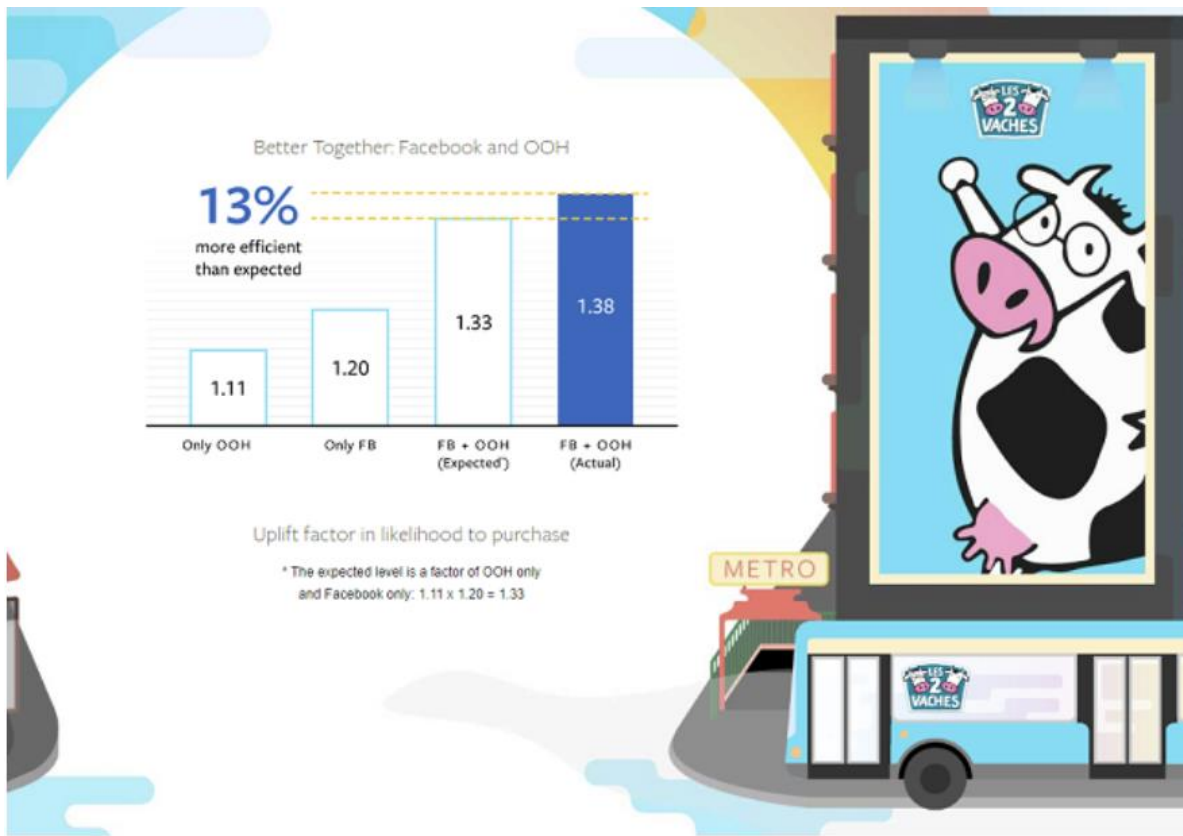
Source: Talon, 2018

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# Facebook Publishes New Report on the Benefits of Combining Facebook and Outdoor Advertising



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“When comparing different approaches, **using both Facebook and OOH ads worked best** - with the combined impact proving to be 13% more efficient than expected.”

“With both Facebook and OOH channels included in the media mix, **all intended audiences—including new and existing customers**—were reached, driving 6% of incremental sales, far beyond the benchmark.”



02/09/2019 - Views

## Why Facebook is channelling Friends Reunited

Facebook endorsement for Talon's 4th Space industry initiative.

Facebook has had its fair share of bad press, audience challenges and brand safety issues amidst its meteoric growth.

It released a report last week on the benefits of combining Facebook and Outdoor advertising that is a welcome realisation that media channels work better together. Mirroring our own research into how full motion digital OOH can brilliantly extend a brand's social media assets, the latest work shows how the reinvented oldest broadcast medium can still play nicely with young protagonists.

Commissioning Kantar and Accenture to research the behaviour towards brands amongst 5,539 individuals in UK, France and Germany, the report has leant in to the key benefits of OOH.



## OOH NOW PRIMED TO IMPLEMENT BEHAVIOURAL AUDIENCES

OOH is now well primed to take advantage of behavioural data for audience targeting



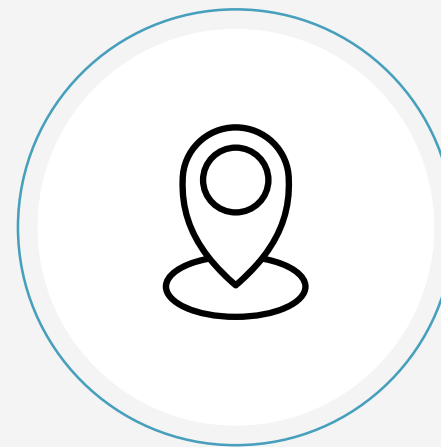
LIVE WITHIN



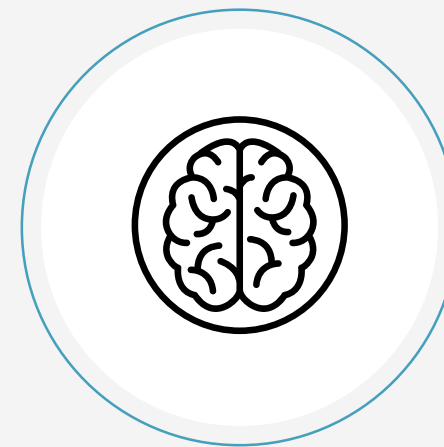
WORK WITHIN



VISITED



INTERESTED IN



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# OUTCOMES-BASED MEASUREMENT APPROACH



## FOOTFALL



Did people visit the shop?

## PURCHASE



Did consumers buy the product?

## BRAND UPLIFT



Do people prefer my brand?

## APP DOWNLOAD



Did people download my app?

## WEBSITE VISIT

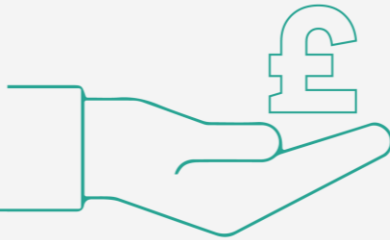


Were people driven online?





# TO DEMONSTRATE THE VALUE OF DOOH



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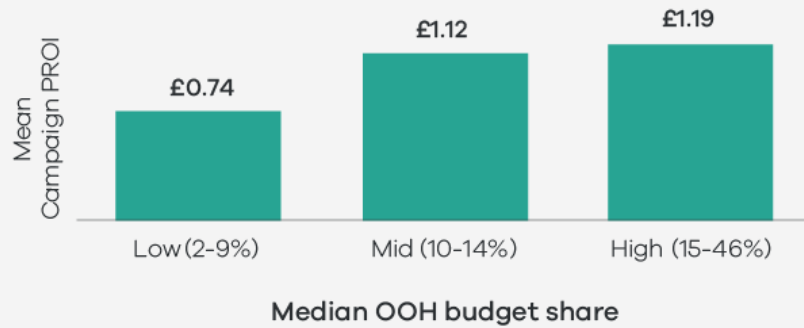
# OUR FOUR DISCOVERIES



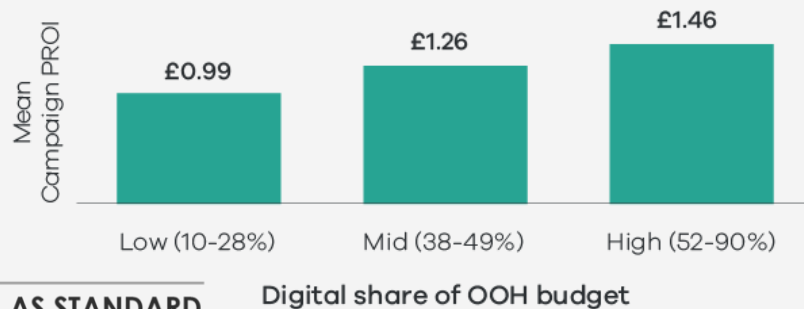
- 1** OPTIMAL OOH/DOOH SHARE OF A MEDIA PLAN
- 2** DOOH IS WORTH ITS PREMIUM
- 3** FOR NON-TV SPENDERS DOOH IS ESSENTIAL TO DRIVE PROFIT
- 4** LARGE FORMAT CAMPAIGNS CAN DARE TO DIGITISE

# OOH PAYS BACK

## CAMPAIGN PROFIT VS OOH SPEND



## CAMPAIGN PROFIT VS DIGITAL SHARE OF OOH SPEND

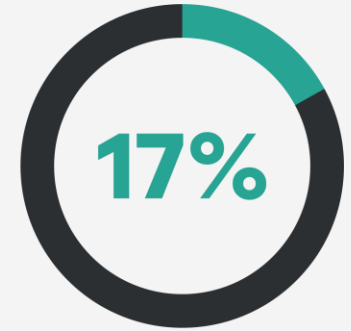


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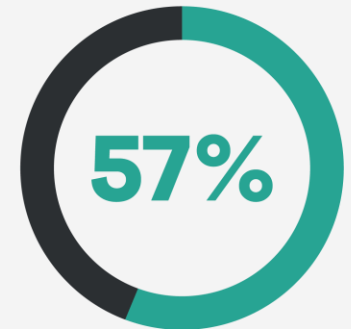
Digital share of OOH budget



OPTIMUM MEDIA SPEND



OPTIMUM DOOH SPEND

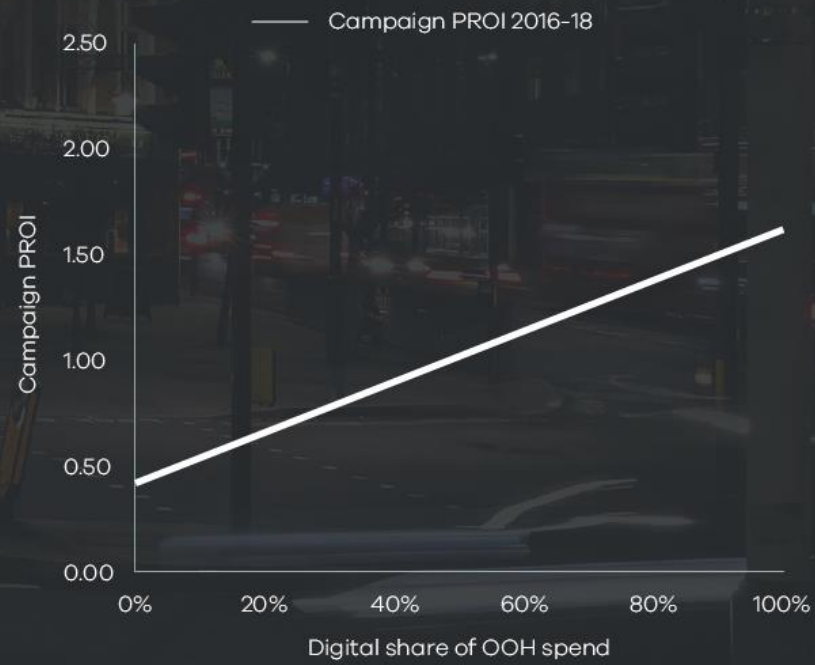


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**DIGITAL IS WORTH ITS**  
**PREMIUM** IN TERMS  
OF **PROFIT**  
GENERATED

# HIGHER DOOH SHARE IMPROVES PROFIT

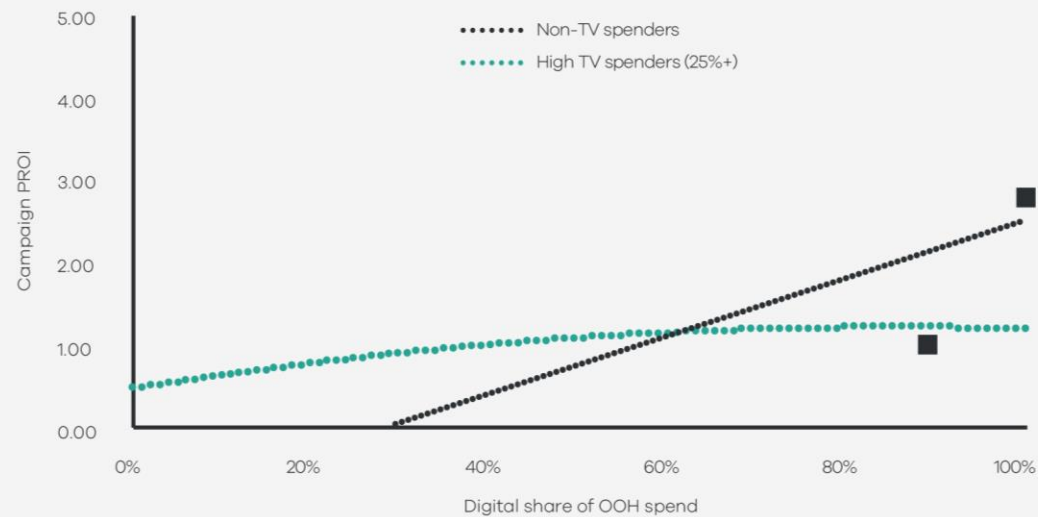


+

USING 100% DOOH  
DOUBLED  
EXPECTED PROFIT

**x2**

# NON-TV SPENDERS USE DOOH TO DRIVE PROFIT



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# HIGH USE OF DOOH IMPROVES EFFECTIVENESS OF LARGE AND SMALL FORMATS

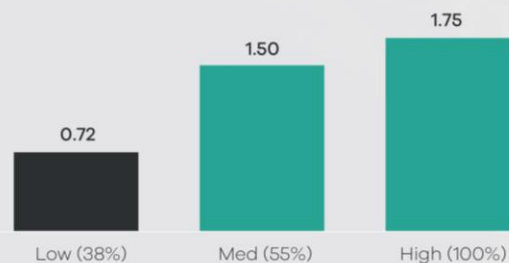
EVERY PULSING DOT REPRESENTS A LIVE  
CYBER ATTACK

Total server attacks today: 8,373

If you fall victim to cyber crime, Hiscox specialist small business insurance will get you back on your feet in no time.

HISCOX  
EVER ONWARDS

SMALL FORMAT



Digital share of OOH

LARGE FORMAT



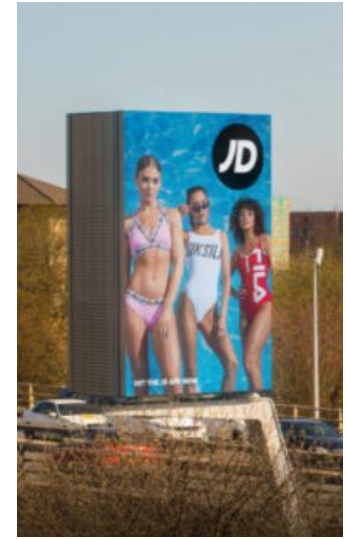
Digital share of OOH

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THE MOST EFFECTIVE  
LARGE FORMAT  
CAMPAIGNS ARE USING  
**HIGH LEVELS OF DOOH**



LARGE FORMAT OOH  
CAMPAIGNS WITH  
100% DIGITAL  
DRIVE GREATER  
PROFIT

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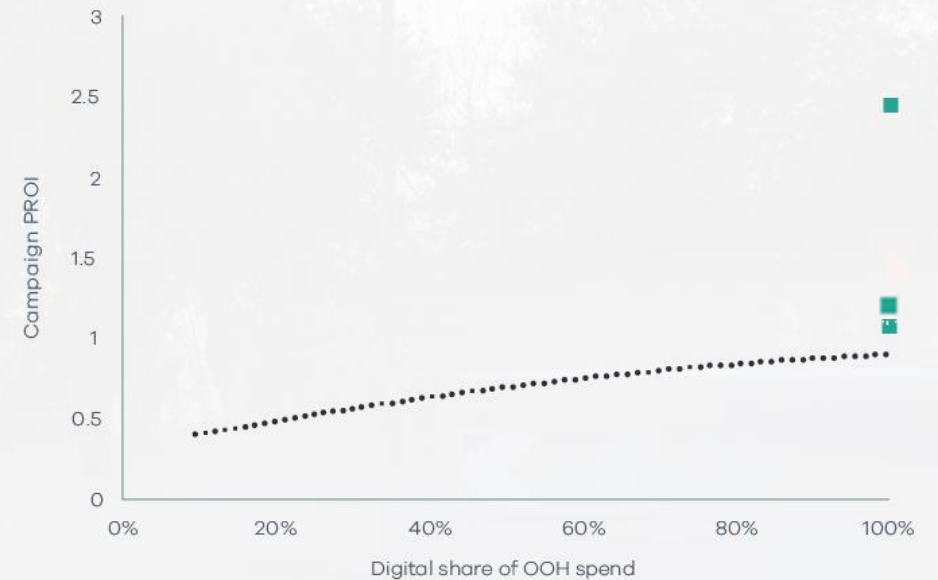


# LARGE FORMAT OOH CAMPAIGNS WITH 100% DIGITAL DRIVE GREATER PROFIT



+ ONE EXAMPLE OF A  
LARGE FORMAT  
CAMPAIGN USING  
100% ACHIEVED A  
**x3**  
HIGHER PROFIT

CAMPAIGN PROFIT VS DIGITAL SHARE OF OOH SPEND





# OUR FOUR DISCOVERIES



## OPTIMAL OOH/DOOH SHARE OF A MEDIA PLAN NEEDS TO BE INCREASED TO IMPROVE CAMPAIGN ROI

- Optimal OOH share 17%(currently 11%)
- Optimal DOOH share 57%+ (currently 47%)



## DOOH IS WORTH ITS PREMIUM

- Profit increases by 11% for each 10 points of digital used as a % of OOH.



## FOR NON-TV SPENDERS DOOH IS ESSENTIAL TO DRIVE PROFIT

- Increasing digital share of OOH budget allows non-tv spenders to achieve a higher profit. A high street coffee retailer saw a 35% improved profit using 100% DOOH and no TV.



## LARGE FORMAT CAMPAIGNS CAN DARE TO DIGITISE

- Large format campaigns can be braver and by using 100% digital can return increased profit. A UK food retailer using 100% large format DOOH achieved a profit more than 3x higher than the average.

# Dare to digitise in OOH to drive profit

By Emily Alcorn - 17 October 2019 11:02am



Does DOOH demonstrate real value?

Finding evidence and return on investment solutions remains a crucial part of understanding the role and benefits of Out of Home advertising as we endeavour to provide greater accountability to clients. Talon's latest study with Benchmarking highlights the evolving effectiveness of digital OOH.

The move away from traditional paper and paste sites and towards more digital sites has been the cause for much **debate** around in particular its reach and impact outside of urban areas and the perceived 'premium' price positioning. But undoubtedly the marketplace has evolved, with 11,000 more DOOH screens across the UK delivering 70% more impacts in little more than two years.

This move towards digital provides the opportunity for greater accountability and in this context OOH has been shown serve client KPIs well when used in combination with traditional sites, even helping to **double OOH's effectiveness**.

# Closing the evidence gap in OOH

By Nick Mawditt - 30 October 2019 12:49pm



The Talon Benchmarks database aggregates data for brands and categories across OOH formats.

As data has dictated the direction of travel for the media economy in recent times, there remains an over-reliance on some performance metrics that still profess to measure efficiencies rather than effectiveness. This is changing as we become more proficient and confident in applying measures that truly reflect a cause and effect, whether branding or activation led.

This shift is helping us build a case load of evidence now that can shift media practitioners from the guess to the evidence economy; and Out of Home is no exception.

We have device data, neuroscience, brand metrics and econometrics at our disposal to measure the right outcomes for Out of Home campaigns. Meanwhile, greater targeting accuracy, improved planning techniques around audience behaviours and location and the improved aesthetics and audiences of an Out of Home centre that blends digital and traditional messages is contributing to greater

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