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**HOW OOH BEST
WORKS WITH TV**

FOR A LANDSCAPE OF POSSIBILITIES

A complimentary audience

Reaching light viewers and
extending exposure

Extending the message and driving
effectiveness

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A COMPLEMENTARY AUDIENCE

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YOUNGER AUDIENCES AND TECHNOLOGY DRIVING FUNDAMENTAL CHANGES IN THE WAY WE VIEW

50% are viewing catch up/on demand services. Streaming and mobility changing how and where we view. Digital mindset of young audiences fundamentally changing the relationship and impact of TV for that audience.

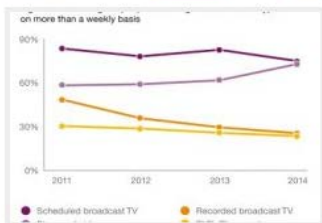
4 SEPTEMBER 2014 - 12:34PM | POSTED BY ANGELA HAGGERTY | 2 COMMENTS

Streaming catches up with linear TV consumption while viewers seek more ad-free environments, study finds

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Streaming TV has caught up significantly with linear TV viewing, with only two percentage points separating the TV consumption methods, according to a report.

The annual Ericsson Consumer Lab TV Media report, which surveyed 23,000 people in 23 countries including the UK, found that 75 per cent of consumers now watch streamed content several times a week, while 77 per cent watch scheduled broadcast TV several times a week.



Study: Ericsson surveyed 23,000 people in 23 countries

Related News

Ericsson bolsters media services with Red Bee Media acquisition

Third of tablet users in UK stream TV shows, survey finds at start of MWC

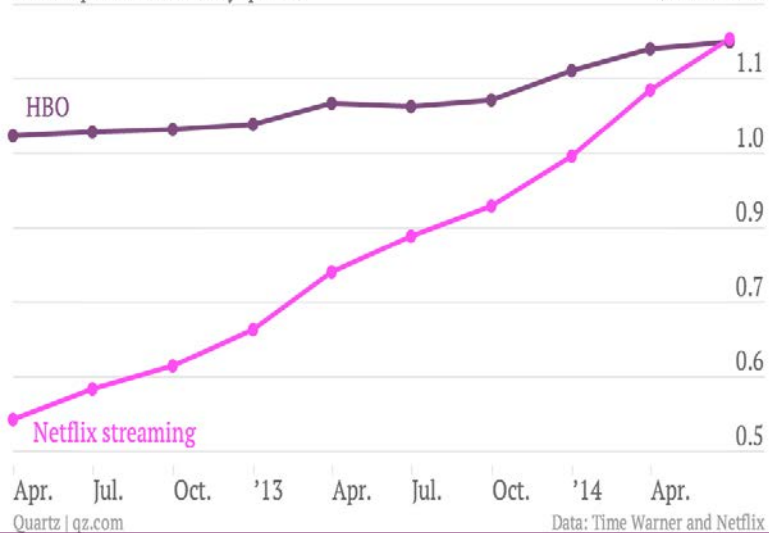
Infographic: 89% of viewers still regularly use the TV to watch their content live

50% of us are using on-demand catch-up services



Growth of BBC iPlayer + on-demand services hit traditional TV commercial impacts. Rapid growth of Netflix in the US showing change in how young view entertainment.

Subscription revenue by quarter \$1.2 billion



IN CONTRAST, ROUTE NOW SHOWING THAT OUT OF HOME CAN HELP TO REACH YOUNG, MALE, UPMARKET AUDIENCES IN PARTICULAR

AUDIENCE	ROUTE	UNIVERSE	INDEX
15-34	37%	32%	114.66
HWK	17%	17%	99.07
15-24	17%	16%	105.84
Men	54%	49%	109.73
Women	46%	51%	90.95
Men 15-34	20%	16%	122.51
Women 15-34	17%	16%	109.56
ABC1	58%	54%	106.98
ABC1 Women	28%	28%	101.25
ABC1 Men	30%	26%	113.33

Audience impacts delivery vs profile

Source: Route



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REACHING LIGHT VIEWERS AND EXTENDING EXPOSURE

FOR A LANDSCAPE OF POSSIBILITIES

CLEAR AND STRONG RELATIONSHIP BETWEEN WEIGHT OF TV VIEWING AND OOH AUDIENCES

TV USAGE	UK 16-24		UK 16-34		London 16-24		London 16-34	
	%	index	%	index	%	index	%	index
Television: Quintile 1 (Highest)	12%	64	13%	68	6%	30	8%	41
Television: Quintile 2	12%	60	14%	73	8%	42	9%	48
Television: Quintile 3	15%	75	17%	86	15%	77	17%	87
Television: Quintile 4	18%	91	19%	100	17%	88	18%	94
Television: Quintile 5 (Lowest)	38%	197	31%	162	46%	237	40%	206
Television: None	5%	182	5%	167	8%	261	8%	263

TGI

TGI data showing huge correlation between Young People and Light Viewers...

...Route data similarly demonstrates the power and efficiency of Roadside OOH reach

	OOH Reach	OOH Index
15-24	96.6%	108
15-34	97.2%	116
London 15-24	98.5%	114
London 15-34	98.4%	126

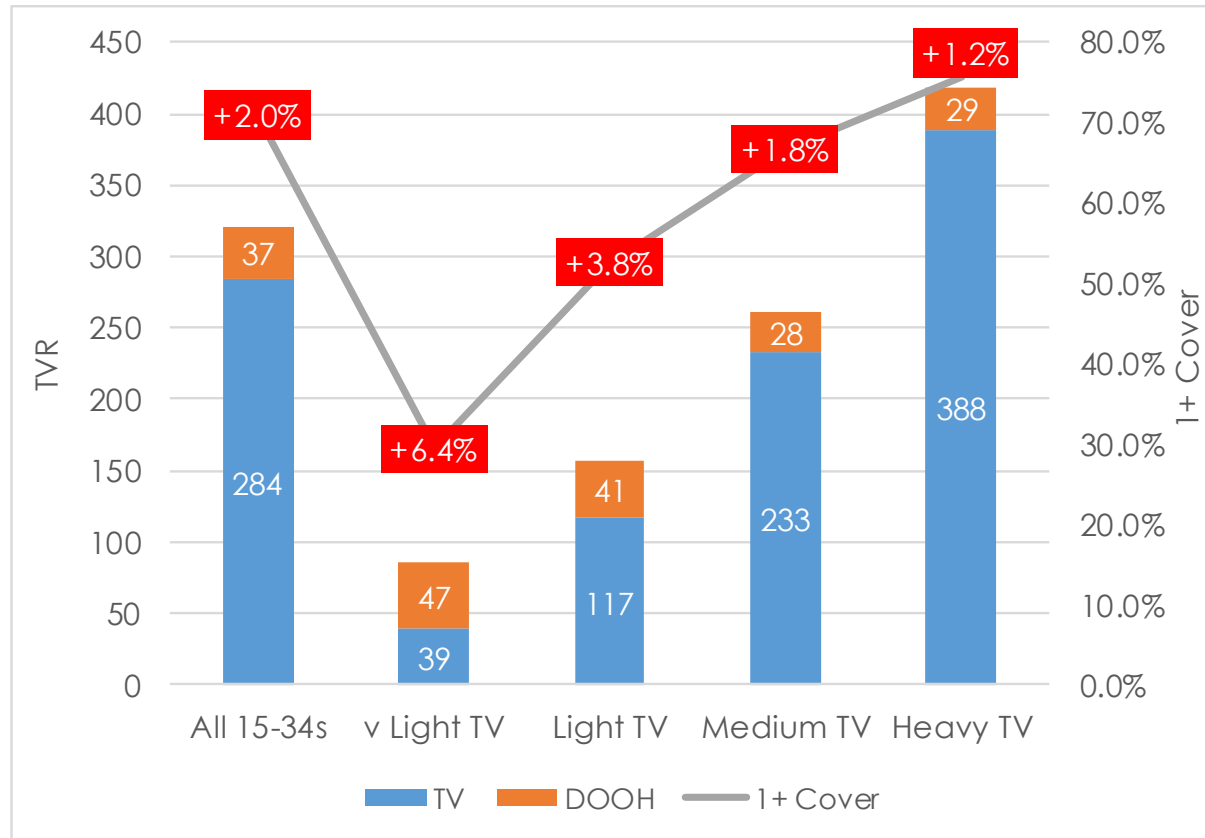
Route

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ADD REACH AND OPTIMISE TARGETING OF LIGHT VIEWER SEGMENTS USING DIGITAL OOH ALONE IN LONDON

“STANDARD” TV CAMPAIGN + LONDON UNDERGROUND D6 ENTERTAINER PACK



Spend just an incremental £43,000 to achieve crucial additional cover of light TV viewers

Source: Route 18.01 / 4 weeks / Adults 15-34 / Standard Slot (17%) / £43,000 DOOH pack cost / M-F TV viewing





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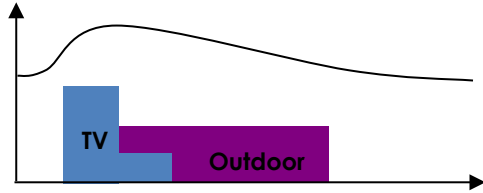
EXTENDING THE MESSAGE AND DRIVING EFFECTIVENESS

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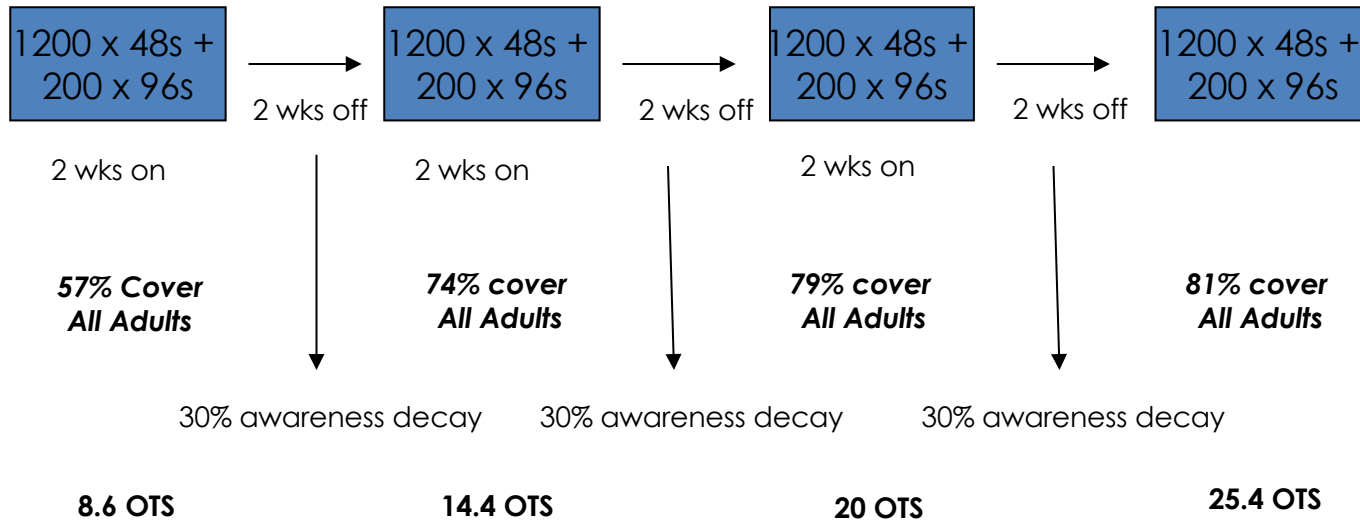
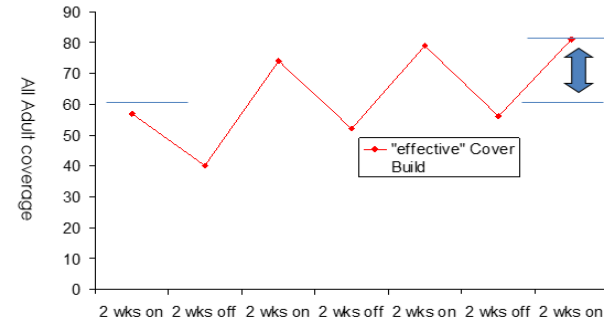
EXTENDED CAMPAIGN DRIVING GREATER EFFICIENCY AND EXTENDED COVERAGE

Outdoor is deployed to extend campaign effectiveness

Sales lift over the campaign period



Cover Build over 8 week period



Source: Route

FOR A LANDSCAPE OF POSSIBILITIES

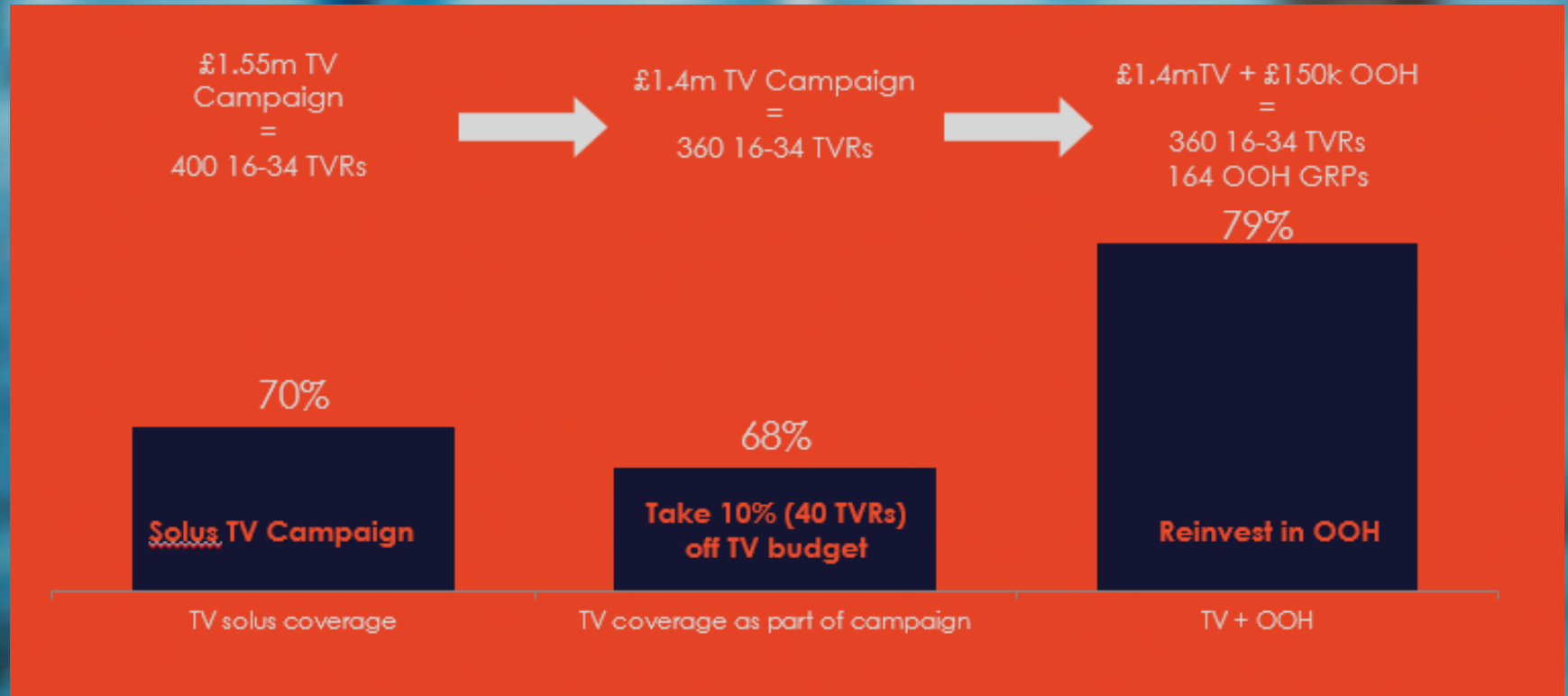
EXTENDING THE MESSAGE

- TV delivers branding and a call to action, but doesn't reach consumers close to the purchase decision... Out of Home can drive recency to a mass audience and multiplies frequency to help work as a call-to-action
- 90% report being reminded of a TV ad by a poster
- 80% of our messages prior to purchase are seen OOH.



Source: Outsmart, Clark Chapman Research

ADDITIONAL EFFECT TO EXTEND THE CAMPAIGN - INCREASE COVER AND IMPACTS WITH TV + OOH

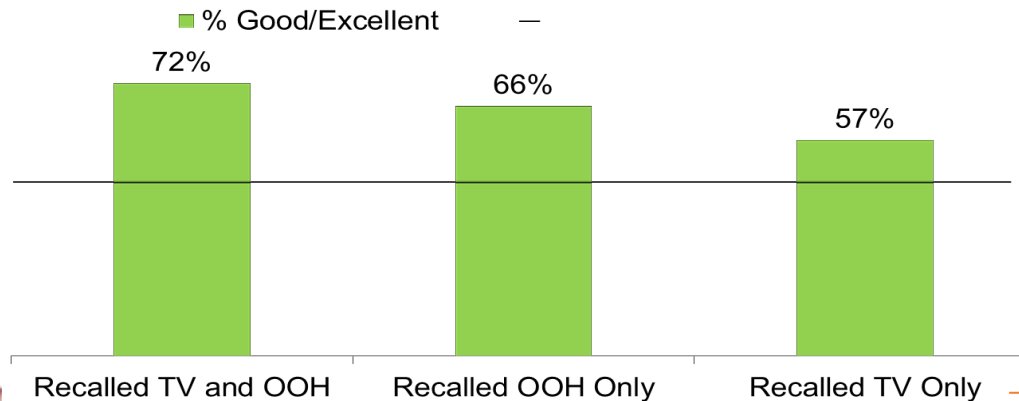
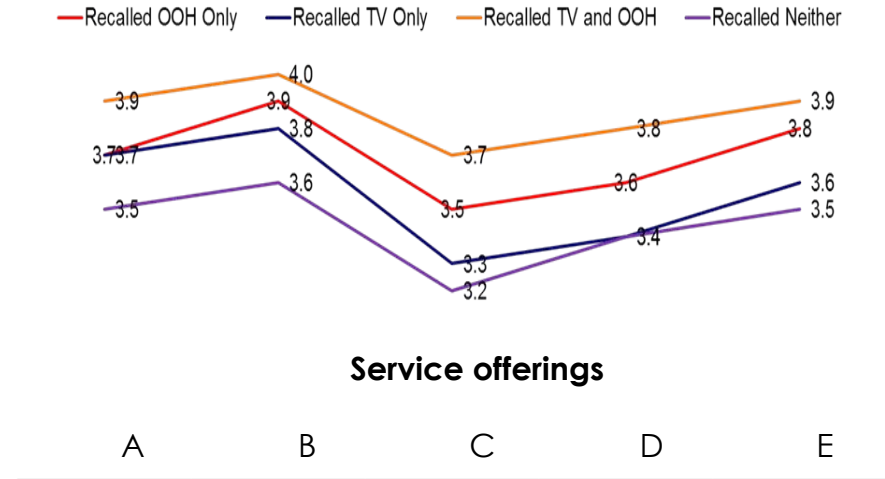
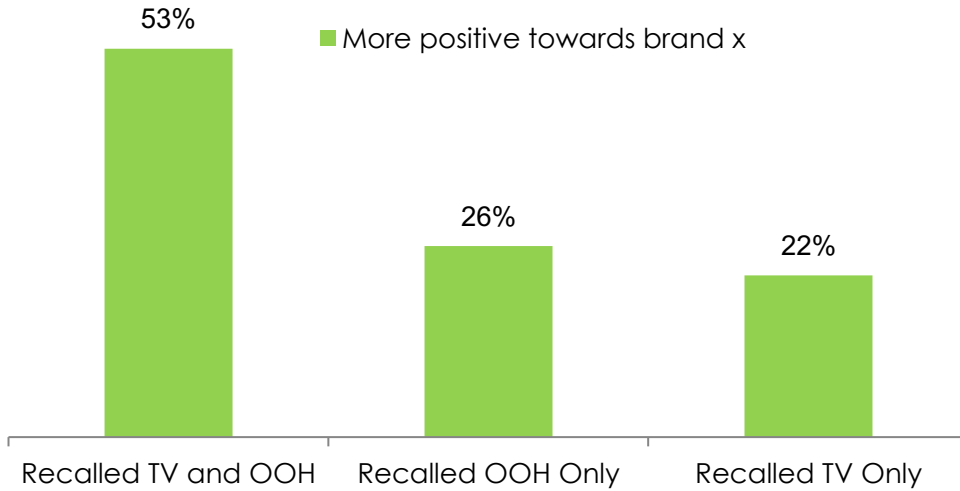


Source: Touchpoints

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COMBINATION OF TV AND OOH DRIVES GREATEST IMPACT



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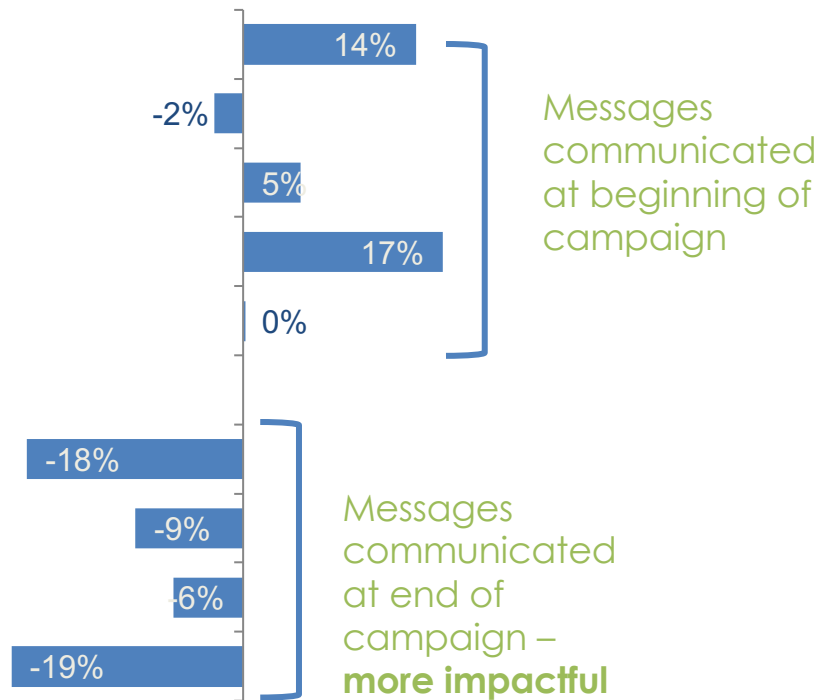
MESSAGES COMMUNICATED AT THE END OF THE CAMPAIGN ARE MORE IMPACTFUL AND MAY DELIVER BETTER ON PROXIMITY MESSAGING...



% points change in Strongly agree/agree to statements from wave that communicated the message to the wave after

- Specsavers' £25 glasses look more expensive than they are
- You can choose to get free reaction lenses at Specsavers
- You can get free varifocal lenses with a pair of glasses at Specsavers
- You can get glasses for £25 at Specsavers
- You can get free prescription sunglasses at Specsavers
- You can get contact lenses for £5 a month at Specsavers
- You can get good value contact lenses at Specsavers
- You can get good deals on designer glasses at Specsavers
- You can get a 2 for 1 deal at Specsavers

Recalled OOH



CONCLUSIONS

OOH can complement TV effectively and work together well

OOH can reach key audiences, including light viewers. Thus, it is worth running alongside TV

OOH can sustain the reach and impact of a campaign and if the initial message is effectively delivered, OOH can sustain the life of the communication.



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