

# *Talon*

**MIND THE GAP!**

**FINDING A WAY TO  
REACH LIGHT OOH  
VIEWERS  
EFFICIENTLY &  
EFFECTIVELY IN 2016  
AND BEYOND**

APRIL 2016

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FOR A LANDSCAPE OF POSSIBILITIES



## WHY LIGHT VIEWERS ARE IMPORTANT TO CONSIDER; WHO THEY ARE AND HOW CAN OOH REACH THEM WHERE TV SIMPLY CANNOT

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TV is struggling to reach its lightest and youngest viewers effectively enough to cut through.

We view 3 hrs, 36 minutes of TV daily; Millennials watch on average 2 hrs, 25 minutes

Reach remains a vital component of successful media planning. OOH is a proven and efficient complement to TV, to reaching light viewers, particularly in London.

For example, millennials view only 2/3 the TV of all adults; in London half of them view less than 2 hours per day, seeing only 12 TV ads per day, but 7x OOH ads.

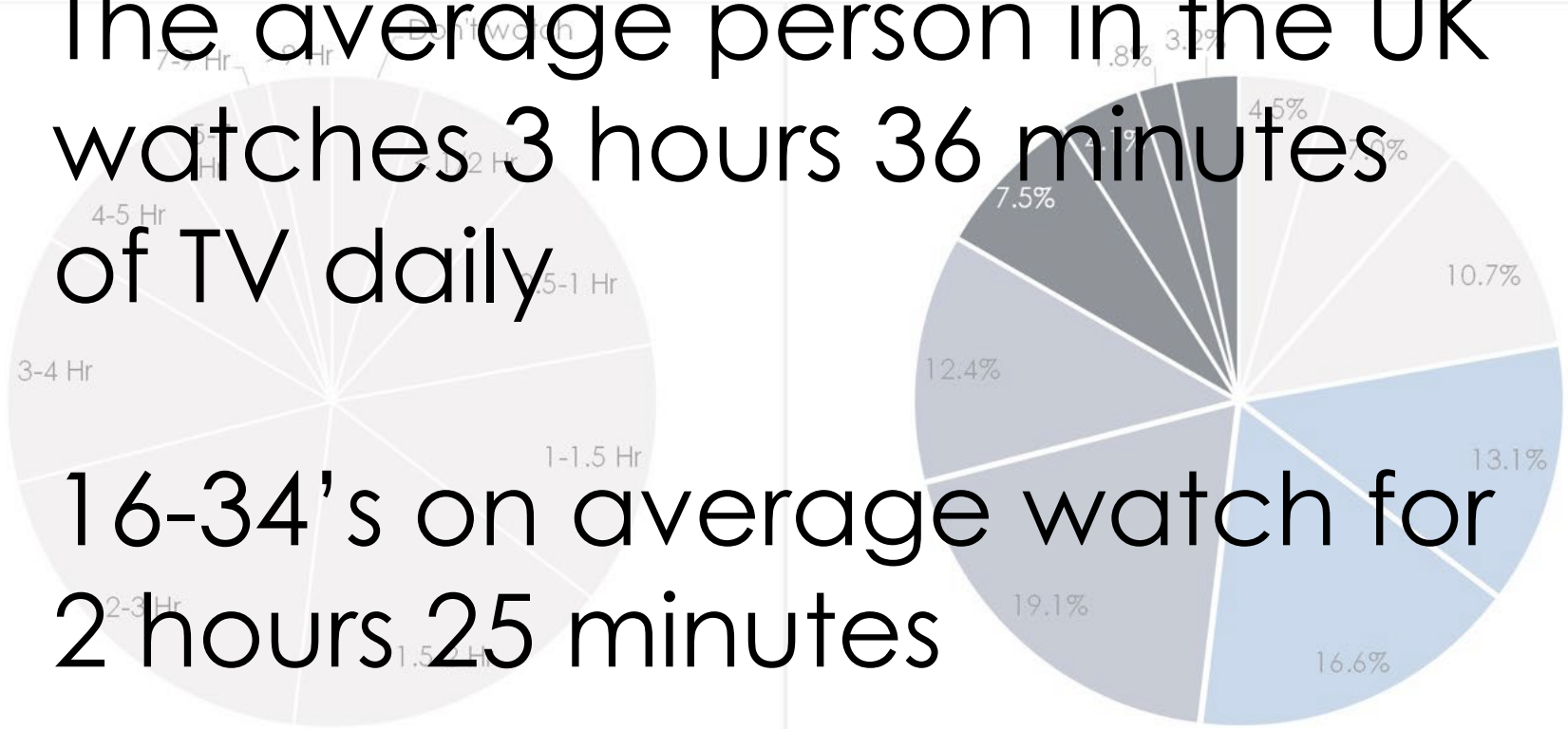
A standard TV campaign is often seen by less than 70% of this audience.

Digital OOH provides one option to close the reach gap; reaching more millennials in London and delivering significant incremental cover.

The logo for Talon, featuring the word "Talon" in a bold, italicized, sans-serif font.

The average person in the UK watches 3 hours 36 minutes of TV daily

16-34's on average watch for 2 hours 25 minutes



Source: Thinkbox 2015 TV Report



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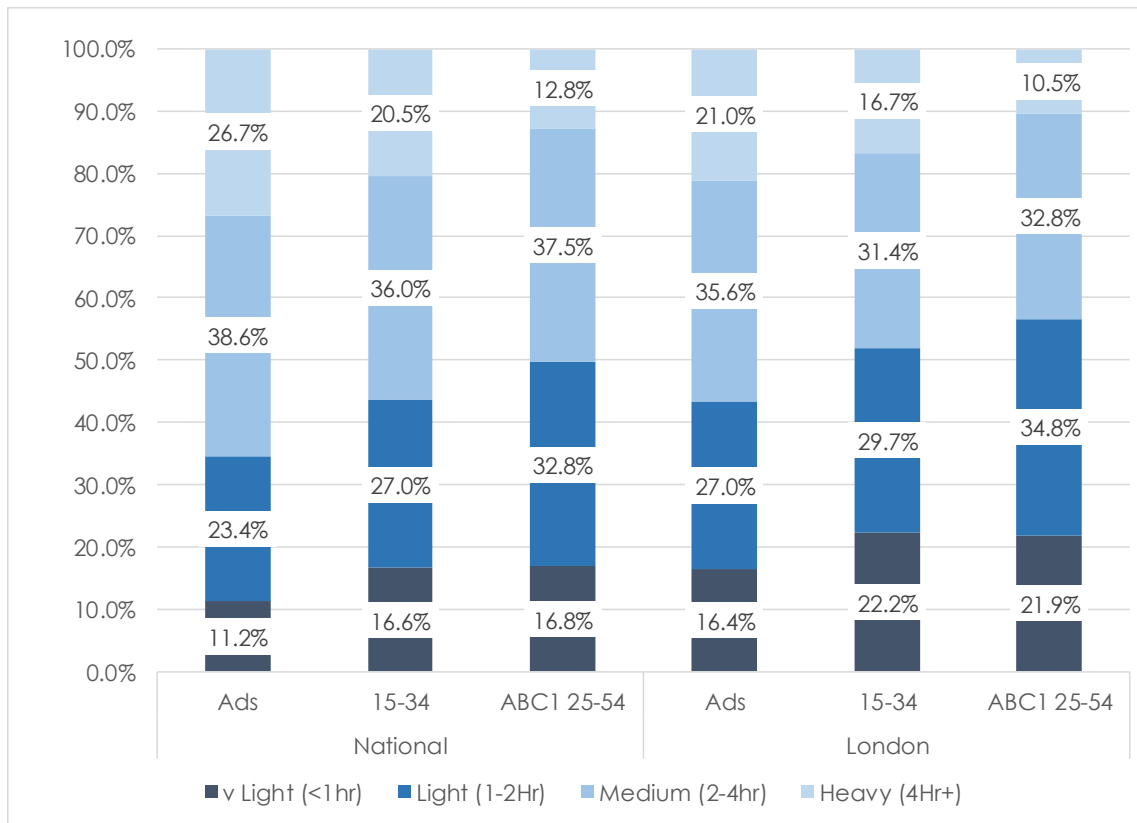
**THE BALANCE OF LIGHT, MEDIUM & HEAVY TV VIEWERS  
AND WHY THEY ARE A DESIRABLE AUDIENCE**

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FOR A LANDSCAPE OF POSSIBILITIES

# AVERAGE DAILY HOURS OF TV VIEWING: NATIONAL & LONDON



**Indexes**

	UK	LON
15-34	126	143
ABC1 25-54	120	131

**52% of 15-34s in London are light TV viewers!**

Source: Route 18.01 / 15+ / Mon-Fri



# 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

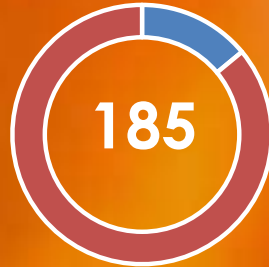
FOR A LANDSCAPE OF POSSIBILITIES

## LIGHT TV VIEWERS IN LONDON – A MORE DESIRABLE AUDIENCE

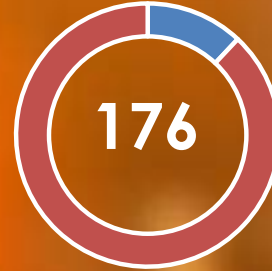
Heavy Mall Shoppers,  
12%



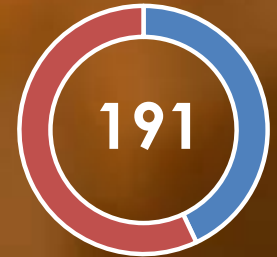
Use mobile for contactless  
payments, 14%



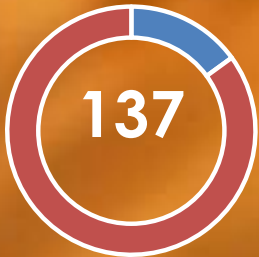
Use Mobile for  
Shopping, 40%



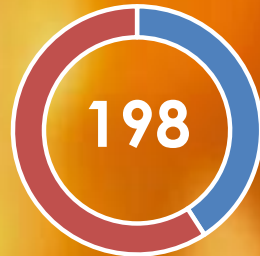
Stream/Download TV,  
43%



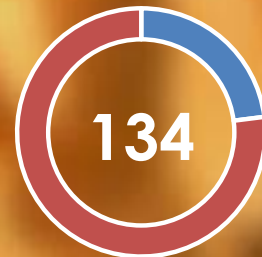
Have downloaded TV  
programmes, 15%



Watch VOD on a PC,  
47%



Watch VOD on a  
Mobile, 23%



Use YouTube for TV  
programmes, 31%



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Source: TGI; London Millennial Light Viewers

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AVERAGE NUMBER OF TV + OOH ADS SEEN DAILY

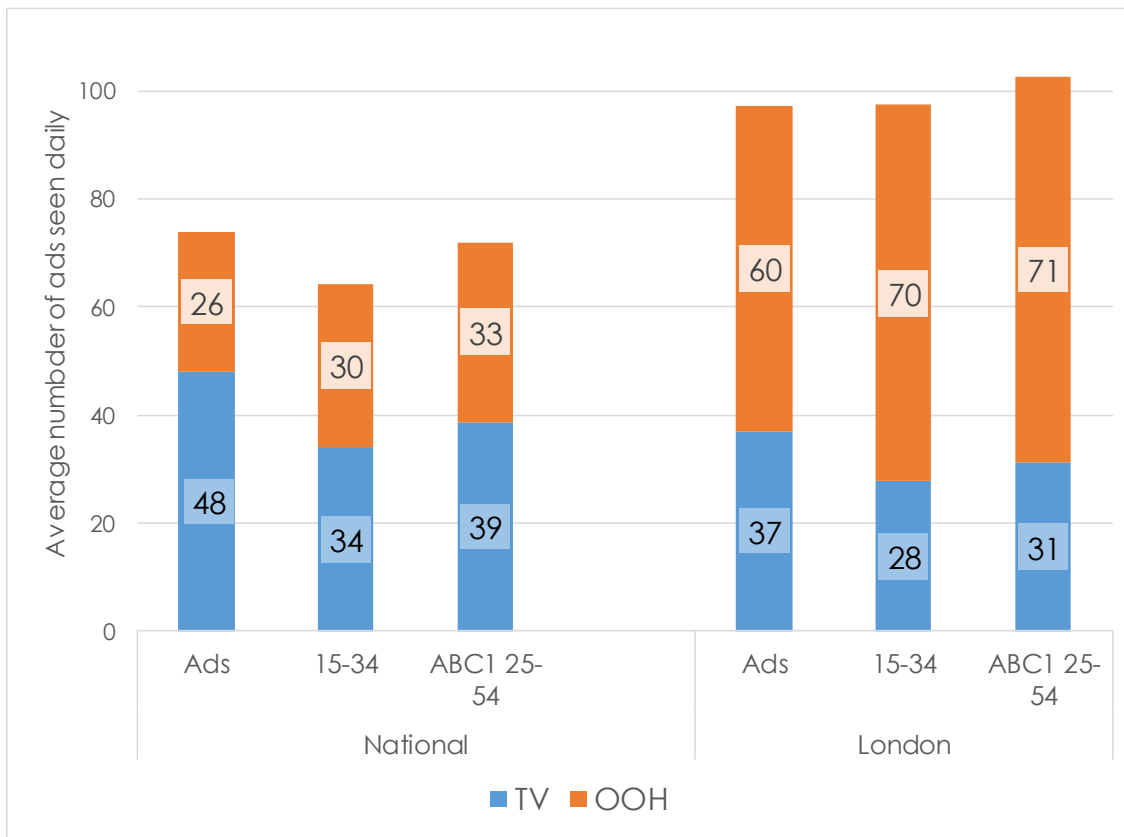
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FOR A LANDSCAPE OF POSSIBILITIES



## AVERAGE NUMBER OF TV & OOH ADS SEEN DAILY: NATIONAL AND LONDON

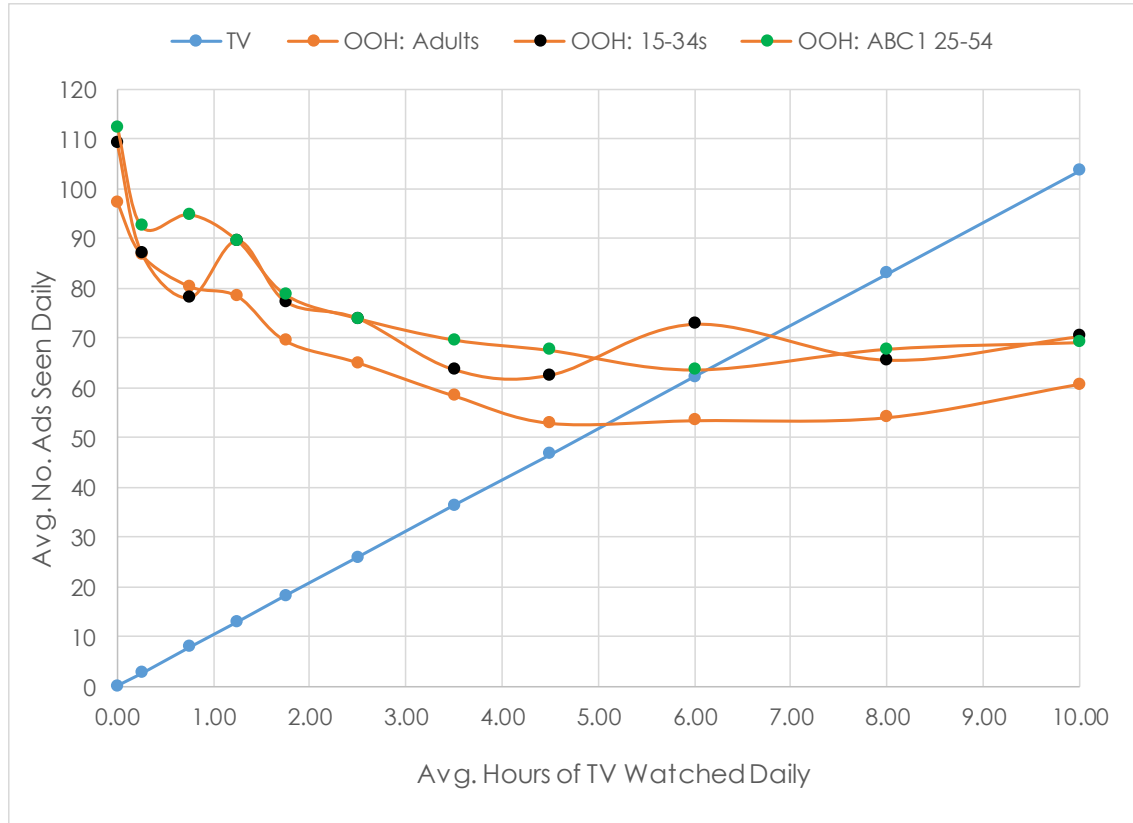


**We see 20-30% fewer TV ads in London and over twice as many OOH ads**

Source: Route 18.01 / 15+ / Mon-Fri



# AVERAGE NUMBER OF TV & OOH ADS SEEN DAILY: LONDON



**A more balanced picture for all audiences in how they consume OOH.**

**Significant shortfall in those who don't see many TV ads made up in OOH!**

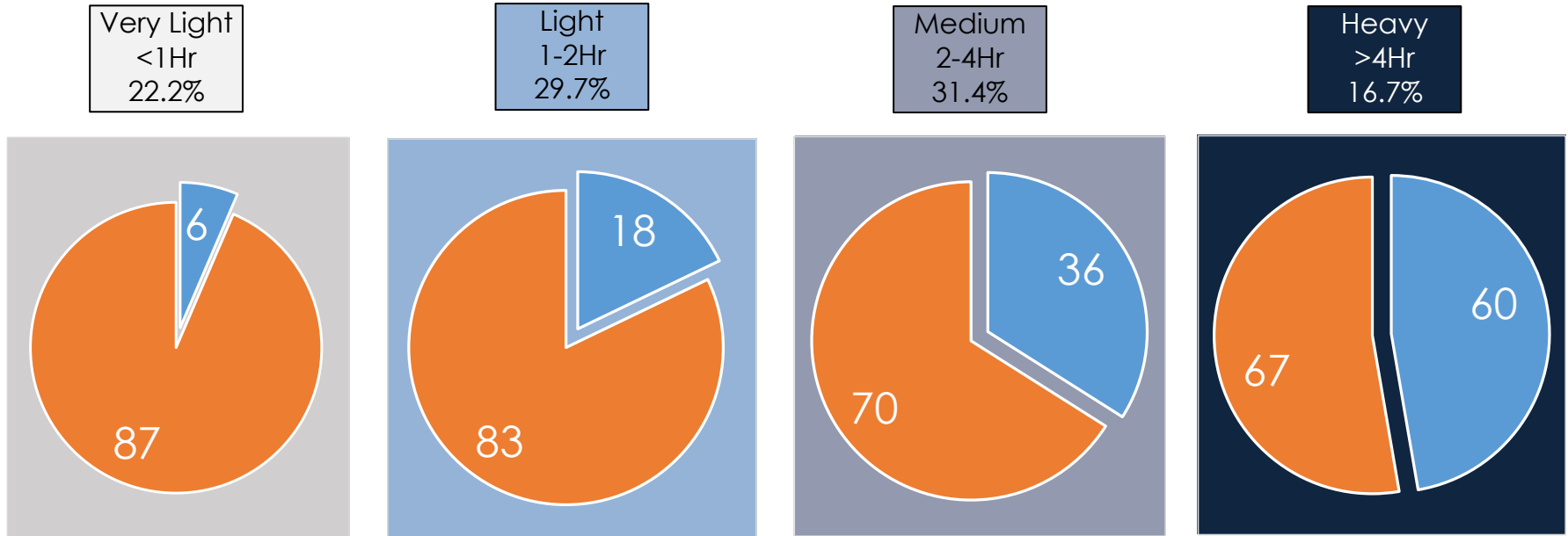
Source: Route 18.01 / 15+ / Mon-Fri



Source: Route 18.01 / BARB / 15+ / Mon-Fri

# AVERAGE NUMBER OF TV & OOH ADS SEEN DAILY: ADULTS 15-34 LONDON

## Desirable Very Light TV viewers in London see only 10% of the TV ads of Heavy viewers



Source: Route 18.01 / Mon-Fri

TV 

OOH 

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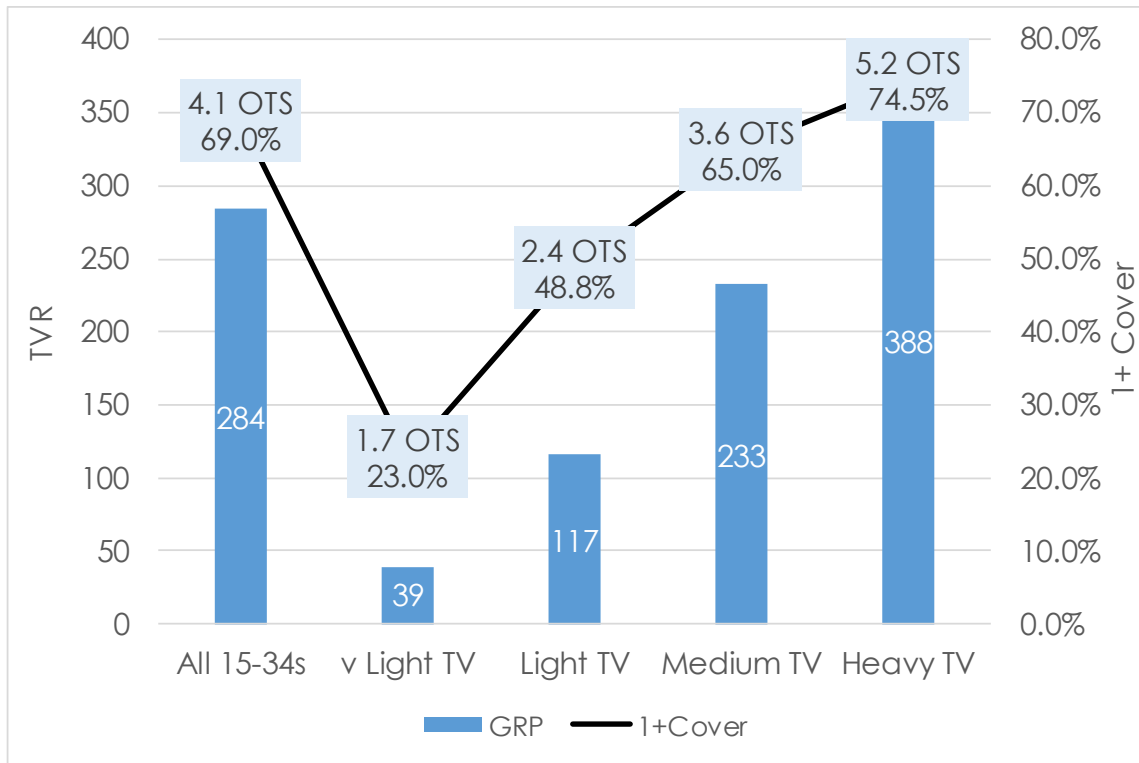
**LIGHTER VIEWERS HARD TO REACH WITH STANDARD  
WEIGHT TV CAMPAIGNS**

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## LIGHT VIEWING MILLENNIALS DIFFICULT TO REACH WITH “STANDARD” TV CAMPAIGNS



**Standard TV campaign delivers significantly fewer light viewer TVRs, falling short of impacts and TVR targets**



Source: Route 18.01 / Adults 15-34 / M-F TV viewing

FOR A LANDSCAPE OF POSSIBILITIES



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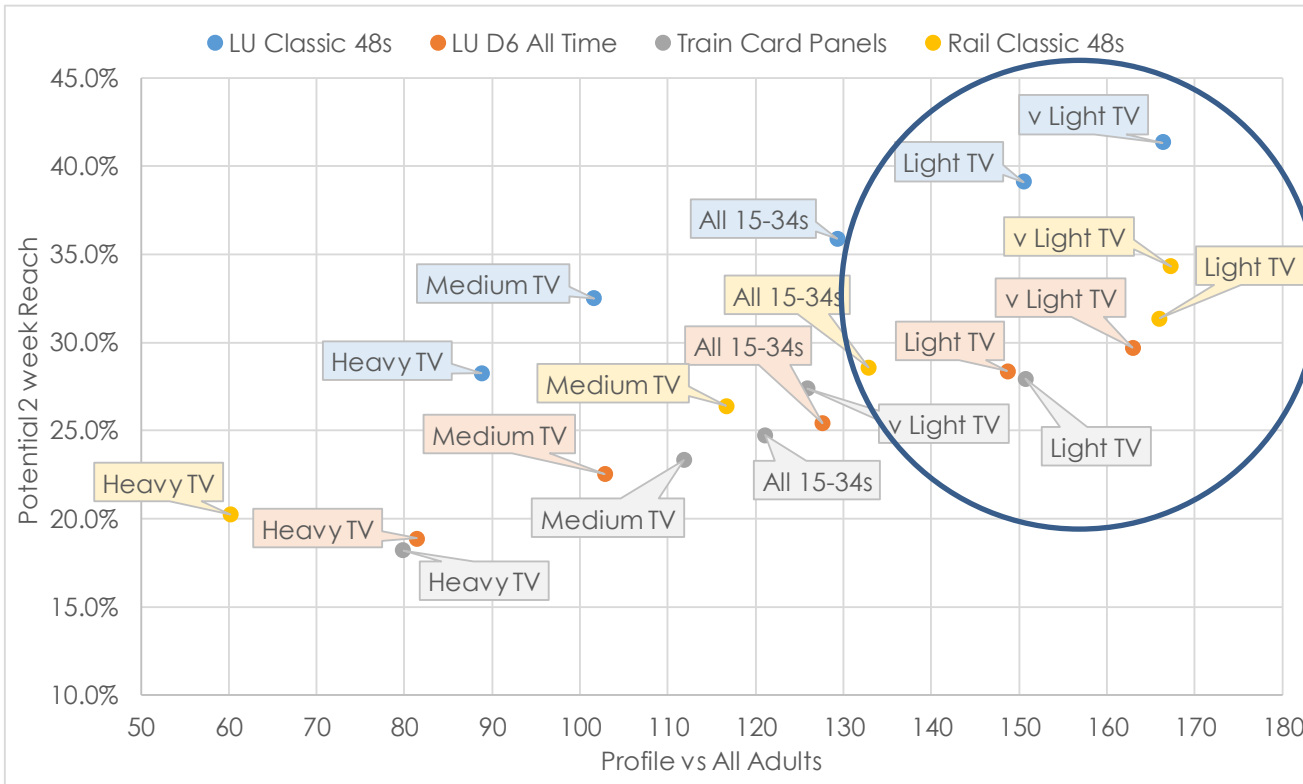
## OOH IN LONDON REACHES THESE LIGHTEST TV VIEWERS BEST

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# LU & RAIL OOH FORMATS REACH INCREASING NUMBERS OF LIGHT VIEWING MILLENNIALS



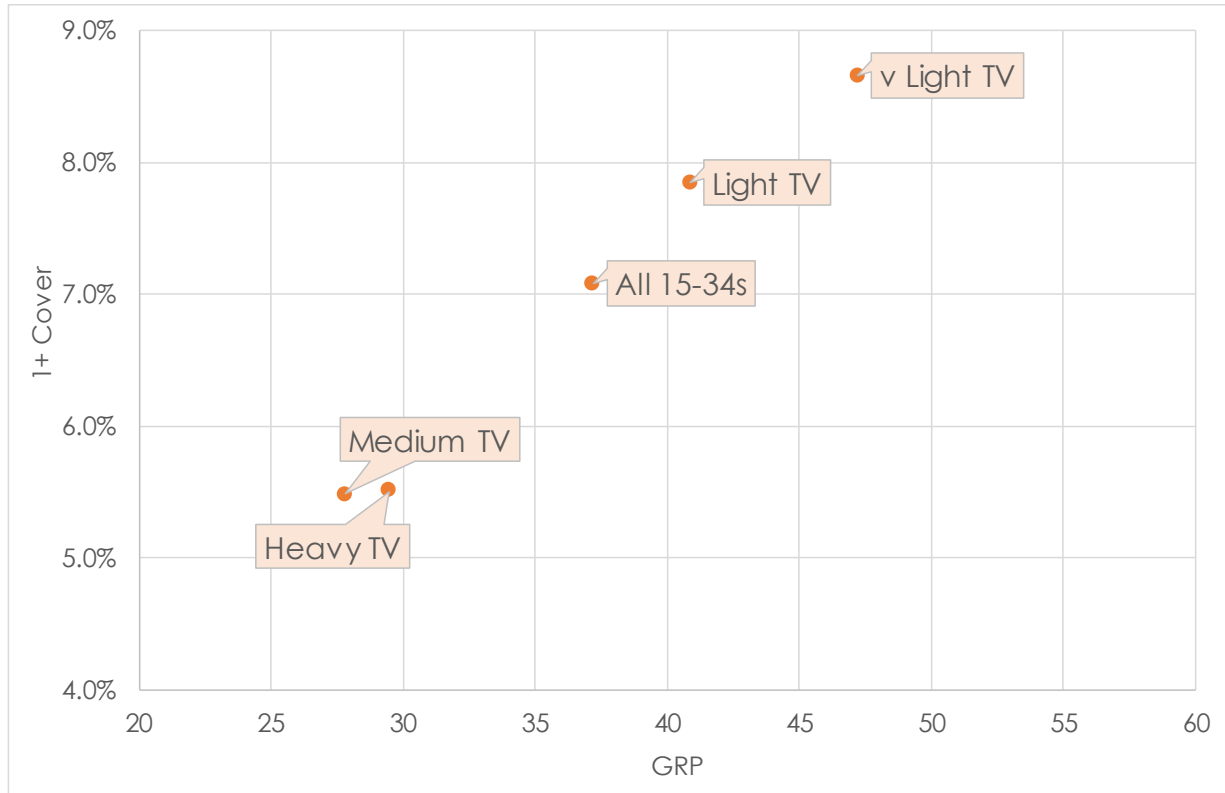
**In London, strongest reach and profile stats against lightest TV viewers**



Source: Route 18.01 / Adults 15-34 / M-F TV viewing

FOR A LANDSCAPE OF POSSIBILITIES

# LU D6 ENTERTAINER PACK : POTENTIAL REACH & PROFILE BY WEIGHT OF TV VIEWING



**In London, strongest reach and profile stats against lightest TV viewers**



Source: Route 18.01 / 4 weeks / Adults 15-34 / Standard Slot (17%)  
M-F TV viewing





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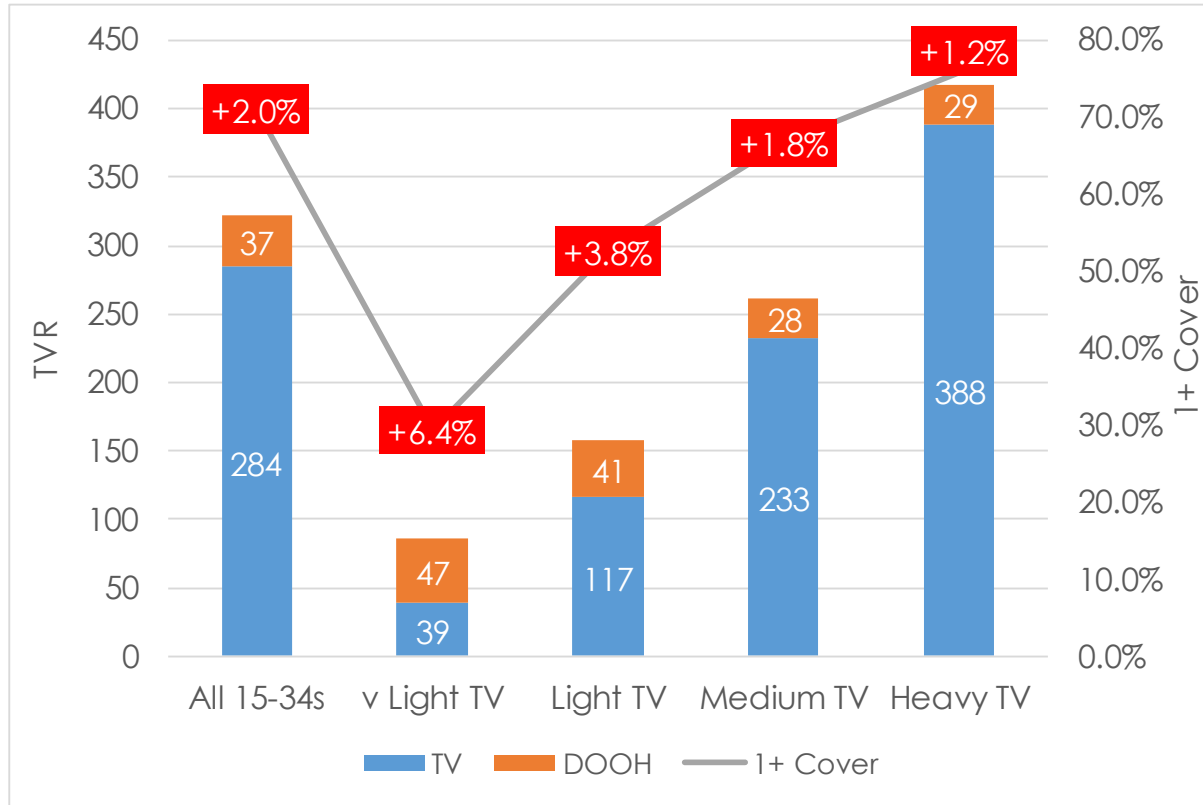
**HOW WE CAN USE TARGETED DIGITAL OOH TO  
INCREMENTALLY REACH MORE LIGHT TV VIEWING MILLENNIALS**

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# "STANDARD" TV CAMPAIGN + LONDON UNDERGROUND D6 ENTERTAINER PACK



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

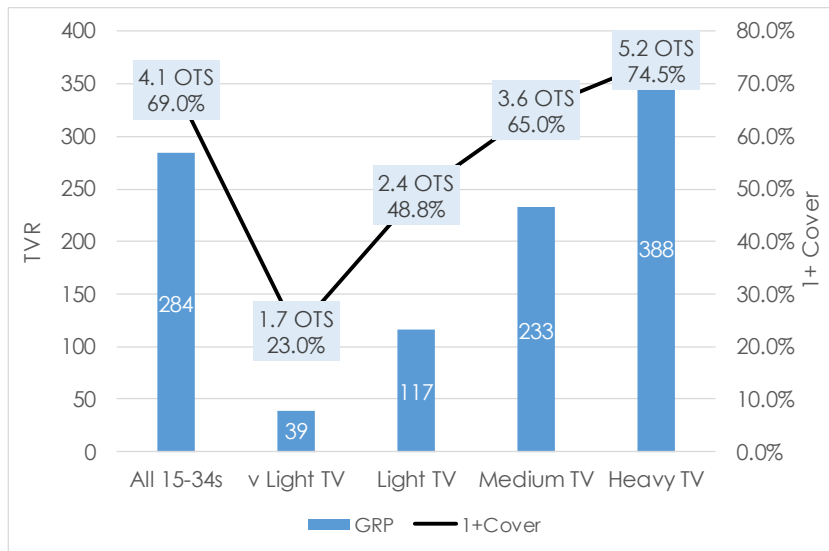


Source: Route 18.01 / 4 weeks / Adults 15-34 / Standard Slot (17%) / £43,000 DOOH pack cost / M-F TV viewing

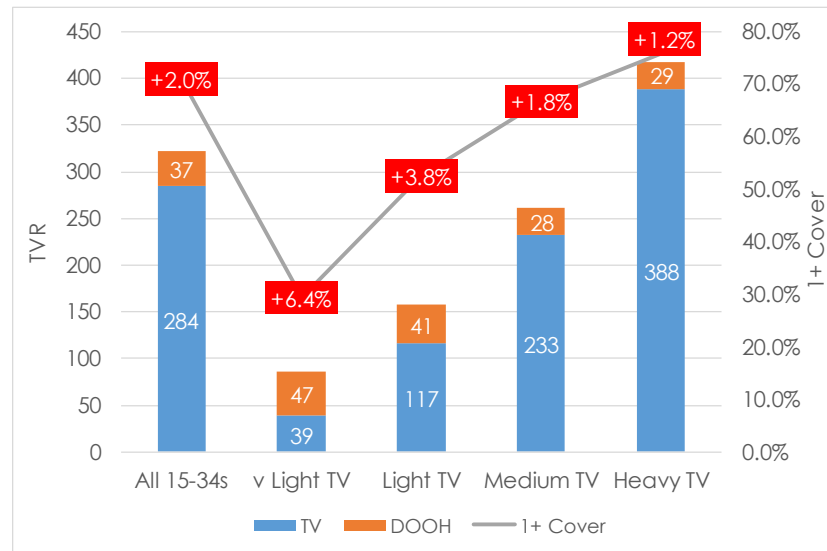
FOR A LANDSCAPE OF POSSIBILITIES

# SUMMARY: "STANDARD" TV CAMPAIGN + LONDON UNDERGROUND D6 ENTERTAINER PACK

## TV/AV Only



## + £43K DOOH



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

## DIGITAL OOH A DRIVING FORCE FOR GROWTH, EFFECTIVENESS AND SMARTER PLANNING



Messages twice as likely to be seen and for 60% longer

ROI and profits driven most at around 45% digital OOH spend / 25-30% frames / impacts

Premium placements can have a positive effect on responses to other ads via a 'priming' effect - the impact that attention-grabbing premium placements have beyond the initial viewing.

Premium placements reach large, more engaged audiences, take value from the context in which they're seen and offer more creative impact

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The logo for Talon, featuring the word "Talon" in a bold, italicized, brown serif font, set against a white rectangular background.

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## RECAP AND SUMMARY

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## WHY LIGHT VIEWERS ARE IMPORTANT TO CONSIDER; WHO THEY ARE AND HOW CAN OOH REACH THEM WHERE TV SIMPLY CANNOT

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Sources: BARB / Route 18.01 / Mon-Fri



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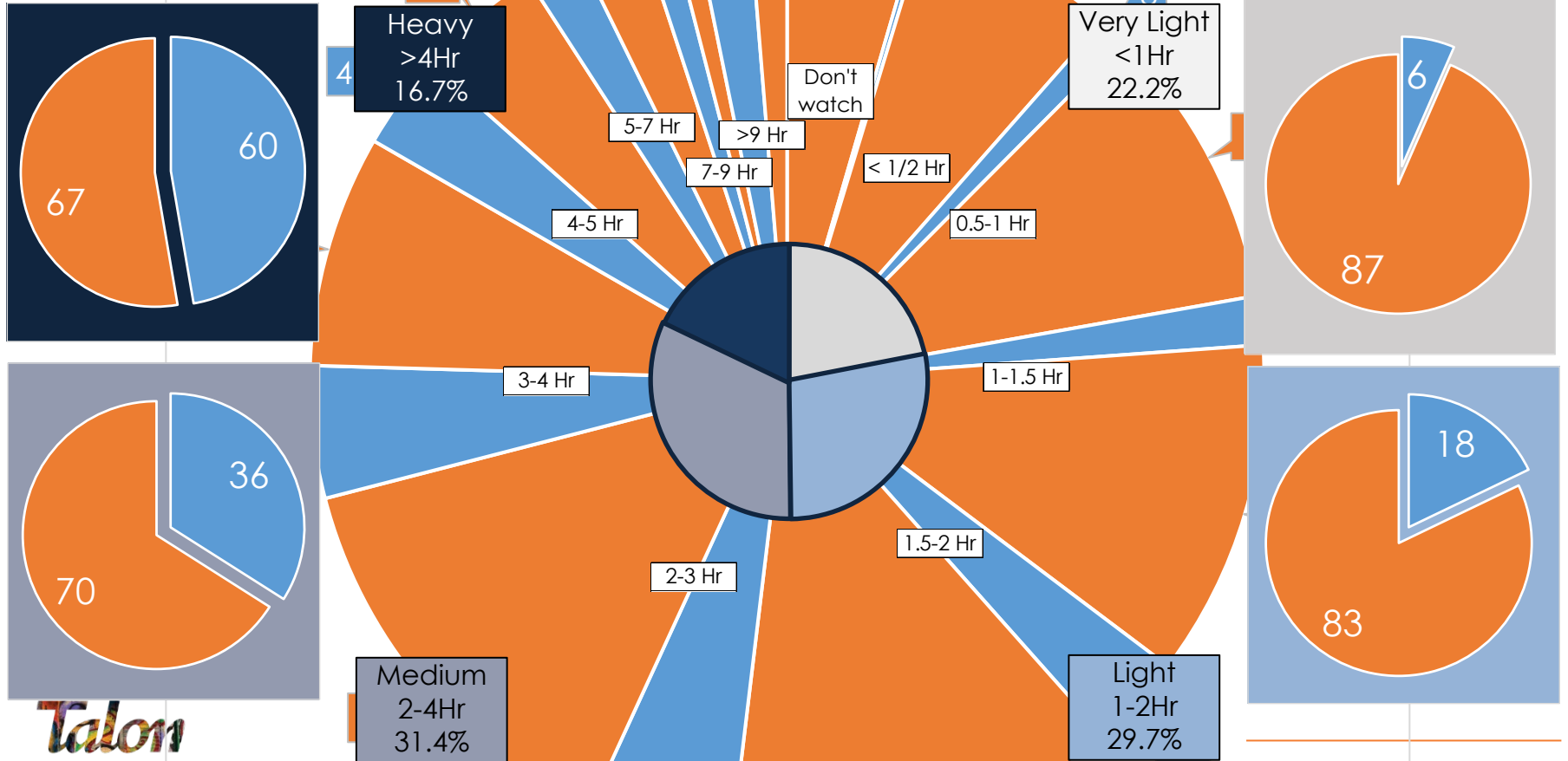
## METHODOLOGY / STATISTICS / SOURCES

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- Route (18.01) data analysis
- Claimed average hours of TV viewed daily Monday-Friday
- (Under-reporting of TV viewing vs BARB)
- Light, medium & heavy viewer groups created
- Approximately one-third of adult population in each group
- Adults 15-34 and ABC1 Adults 25-54 groups use same levels of viewing
- Average no. TV ads seen based on BARB/Thinkbox data/insights
- Adults watch on average 3hrs 36 mins TV daily (source Thinkbox 2015 TV report)
- 68.5% of viewing to commercial channels (source BARB Sep '15)
- 83% of viewing live, 10 minutes of ads per hour (sources: Thinkbox / Ofcom)
- Avg. no OOH ads seen calculated directly from Route
- GB overview by demographic audience
- Additional in-depth analysis for London (BARB) audience



# AVERAGE NUMBER OF TV & OOH ADS SEEN DAILY: ADULTS 15-34 LONDON



Source: Route 18.01 / Mon-Fri

FOR A LANDSCAPE OF POSSIBILITIES