The Brand Building Power of Outdoor

OAA

Mike Baker

CEO

Outdoor Advertising Association

Outdoor in context

- Outdoor now 9.1% of display and growing
- Recovering lost ground in 2010
- H1 2010 +16.2%
- Digital 12.8% of total revenue
- Strong category base
- 95% of top 100 advertisers

Survey results – what agencies want

"Real world case studies, inter/intra media research" **Jane Ratcliffe, CEO, MediaCom**

"Justification of value beyond the last broadcast medium" **Amice Lock, planning director, Starcom**

"An evidence base, case studies, research…" **David Fletcher, head of analytics, MEC**

"How outdoor influences earned media, ROI is important" **Ita Murphy, MD, Mindshare**

"Sell the medium first. What does it do?" **Tim Neligan, MD, Zenith**

"*Champion creativity, focus on retention, do digital research"* **Phil Georgiadis, CEO, Walker Media**

"Work with IAB, more case studies by sector" **Pedro Avery, MD Trading & Futures, Arena BLM**

"Report campaign delivery in terms of impacts/data capture/results" **Paul Phelps, MD, AMS**

"Just one challenge… prove ROI" **Dave Jowett, MD, MediaCom**

"Effect on sales, how outdoor works with TV & online" **Nick Ashley, planning director, Mindshare**

"*Research effect of combining with other media, impact on sales"* **Rob Horler, COO, Aegis**

"Understand the impact of outdoor better, digital future, ROI" **Paul Constantine, MD, Zed Media**

What agencies want to know

Does it work?

How does it work?

How can we do it better?

Econometrics study 2009

- Brand Science commissioned, 400 econometrics studies
- Outdoor generates £1.40 for every £1 spent
- Outdoor makes TV work 40% harder
- In FMCG, outdoor generates best ROI of all media
- A higher share of outdoor generates even better returns
- Outdoor ROI has increased as TV ROI has declined
- Optimised media mix share for outdoor: 16% (FMCG)

Jim Jarrett & Mark Bulling

Mindshare Business Planning

MINDSHARE

OAA

WE NEEDED TO ESTABLISH THE ROLE OF MEDIA IN BRAND DEVELOPMENT

Outdoor builds brands by establishing firm foundations

Outdoor sustains strong brands and grows younger brands

Outdoor brands are more confident

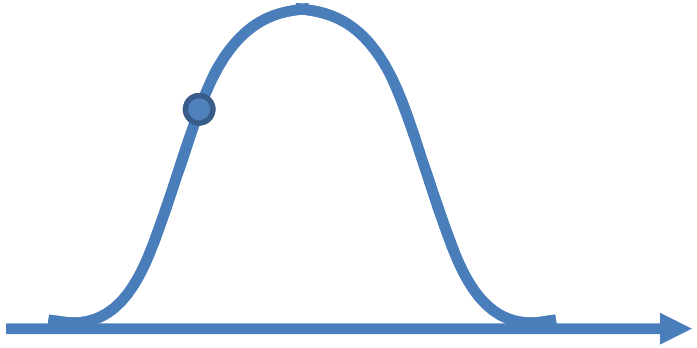
Outdoor drives search

The OAA teamed up with Mindshare and Millward Brown to tackle the brand challenge

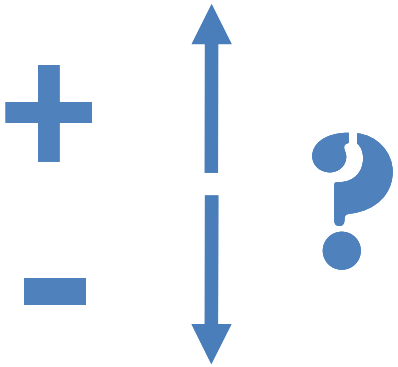
The most comprehensive study of brands in the world

BrandZ is an annual international study that evaluates brands across several dimensions

Brand Strength



Brand Lifestage Typology



Brand Growth Potential

Brand Personality

We combined BrandZ with media spend

2005-09

25 categories

326 brands

+

All mainstream media

=

COMPREHENSIVE UNDERSTANDING OF MEDIA AND BRANDS

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Category coverage

- Airlines
- Women's clothing
- Banking
- Beer
- Bodycare
- Cars
- Confectionery
- Deodorants (M+F)
- Detergents
- Ecommerce
- Face Care
- Fastfood
- Fragrances
- Grocery stores
- Home Entertainments
- Insurance
- IT Software and gaming
- Luxury cars
- Mineral water
- Mobile phone handsets
- Oral care
- Portals
- Soft drinks
- Mobile telecoms operators

OUTDOOR EMERGES AS A MEDIUM THAT DELIVERS FAME

The Brand Pyramid represents the strength of consumers' relationship with a brand

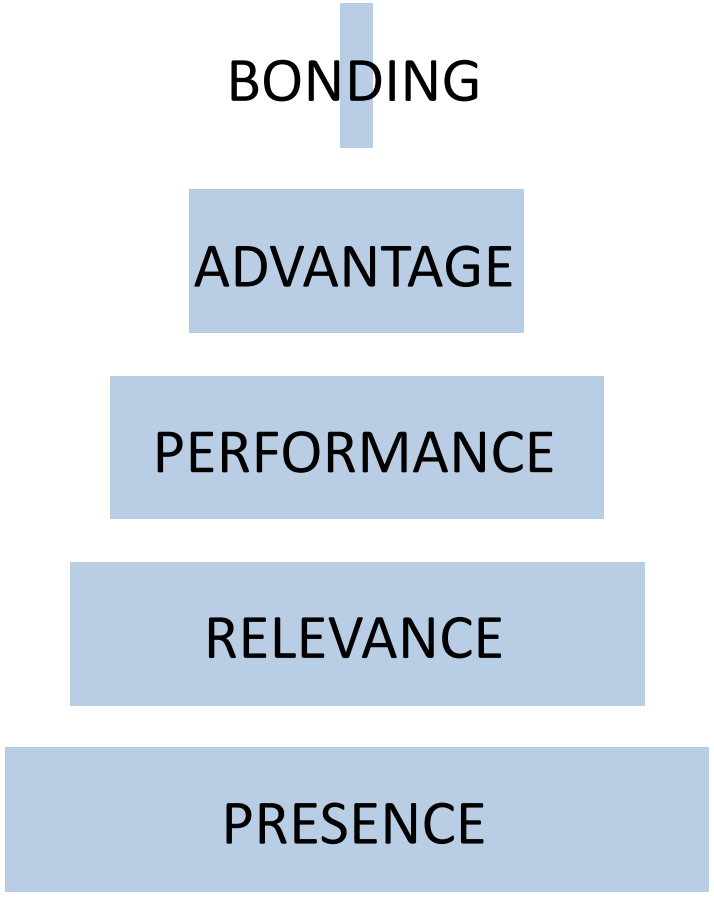
Are you part of their lives?

Do you exceed their expectations?

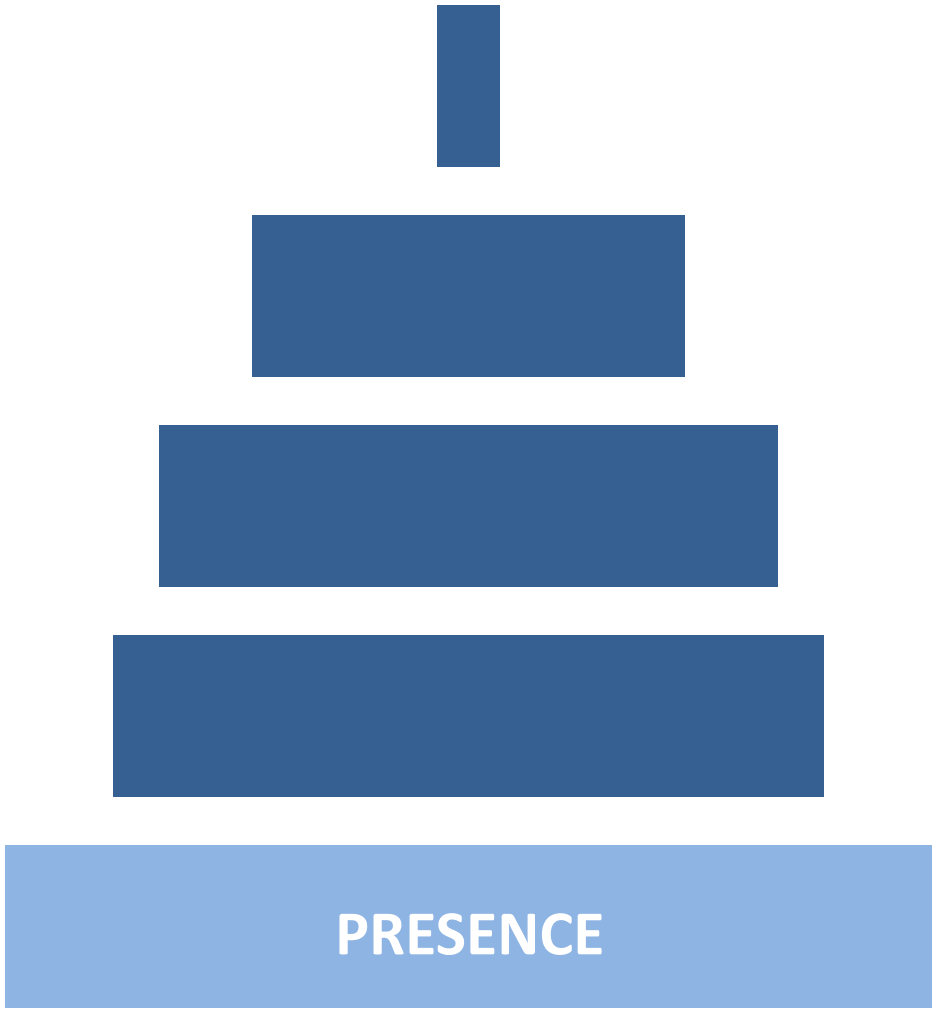
Do you meet their expectations?

Do you cater to their needs?

Are consumers familiar with you?

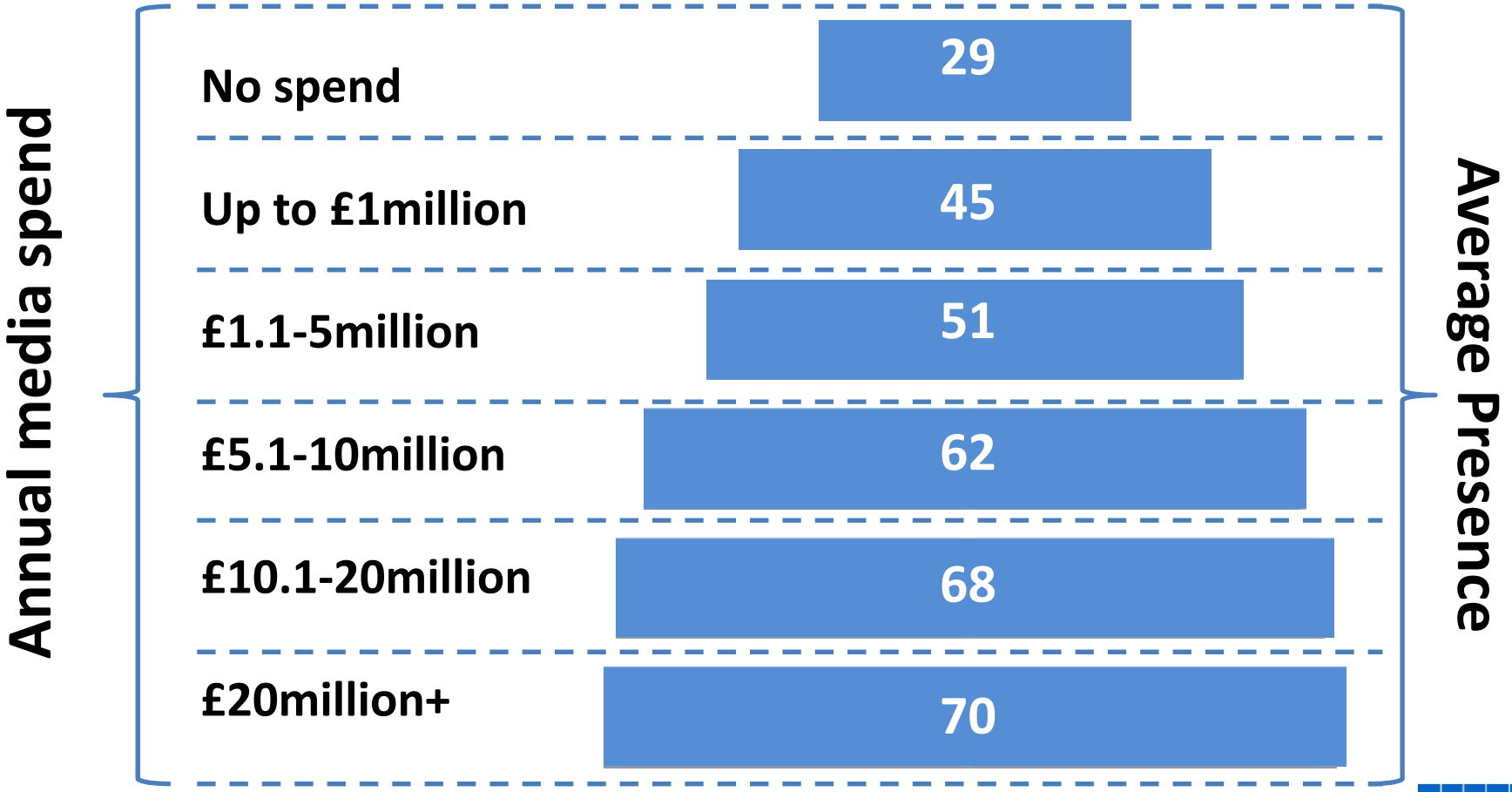


PRESENCE is the Foundation of Brand Strength



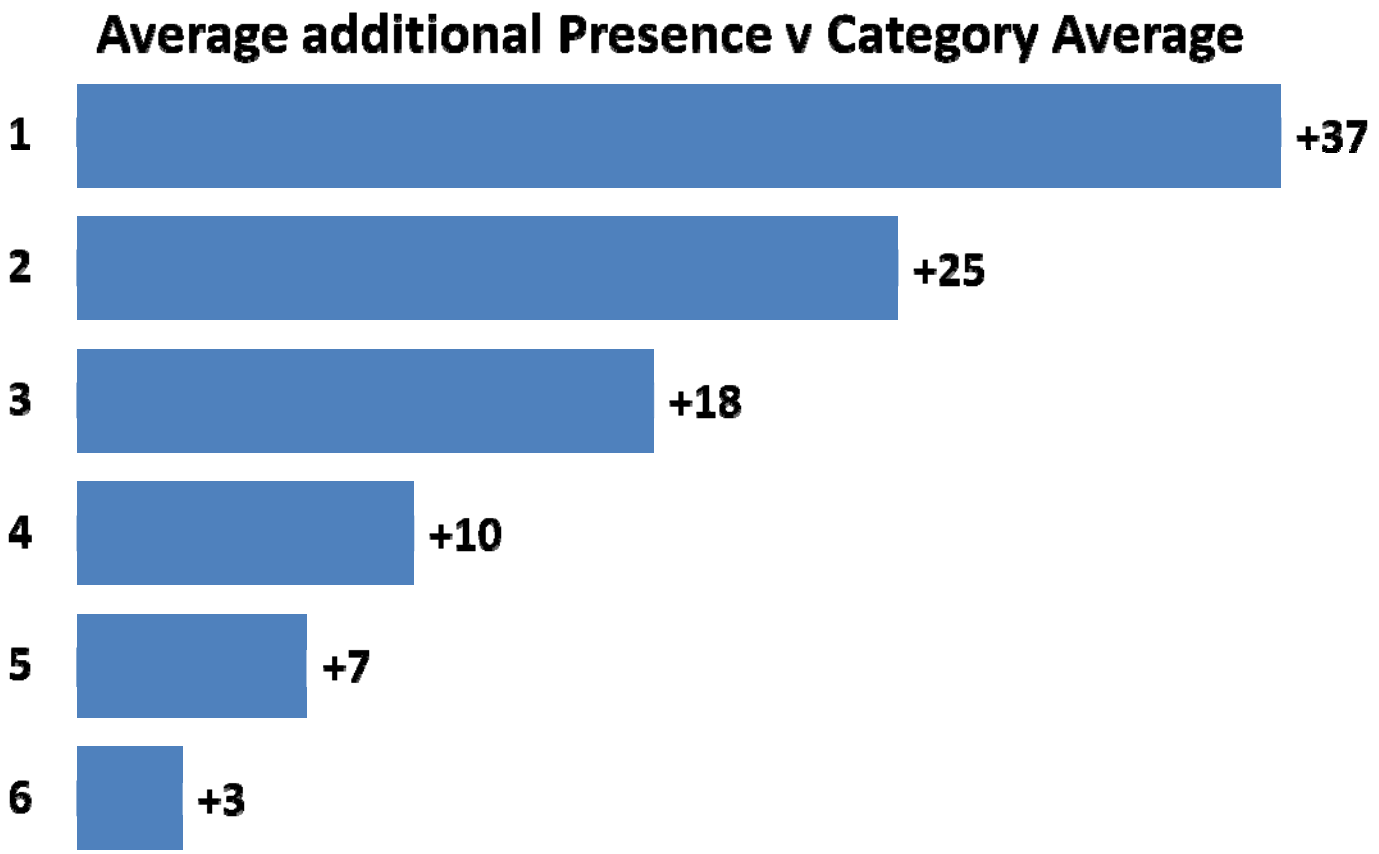
PRESENCE SETS THE LIMITS FOR THE POTENTIAL OF YOUR BRAND

And there is a reassuringly strong relationship between Presence and media investment



Source: Mindshare/ Millward Brown/ The Nielsen Company – 2009 BrandZ data

A high score at Presence is symptomatic of market leadership



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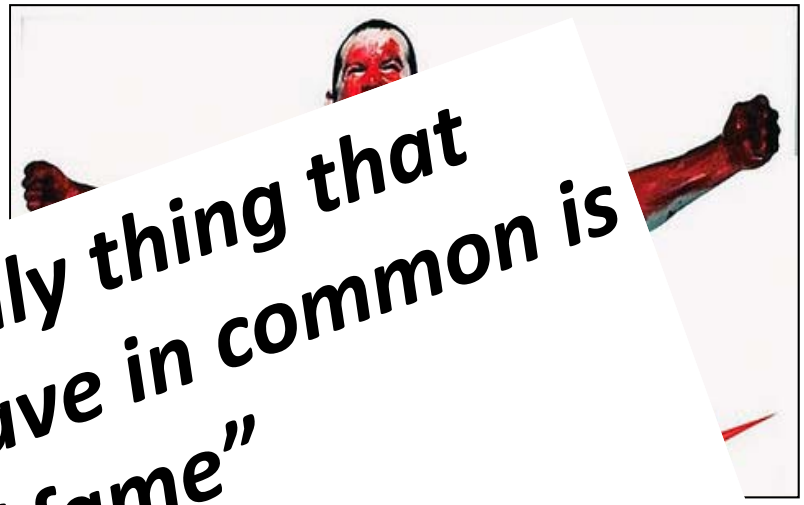
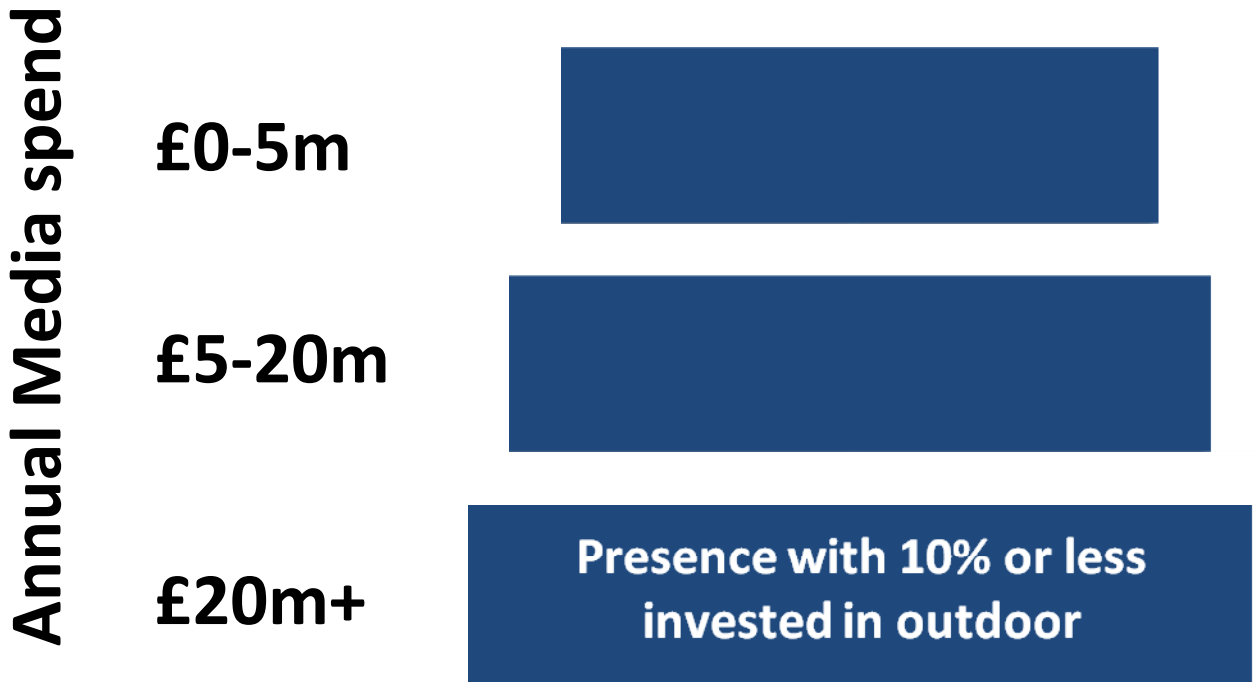


"just about the only thing that successful brands have in common is a kind of fame"

Jeremy Bullmore

A higher Outdoor share is linked to an additional Presence 'dividend' for the same level of investment



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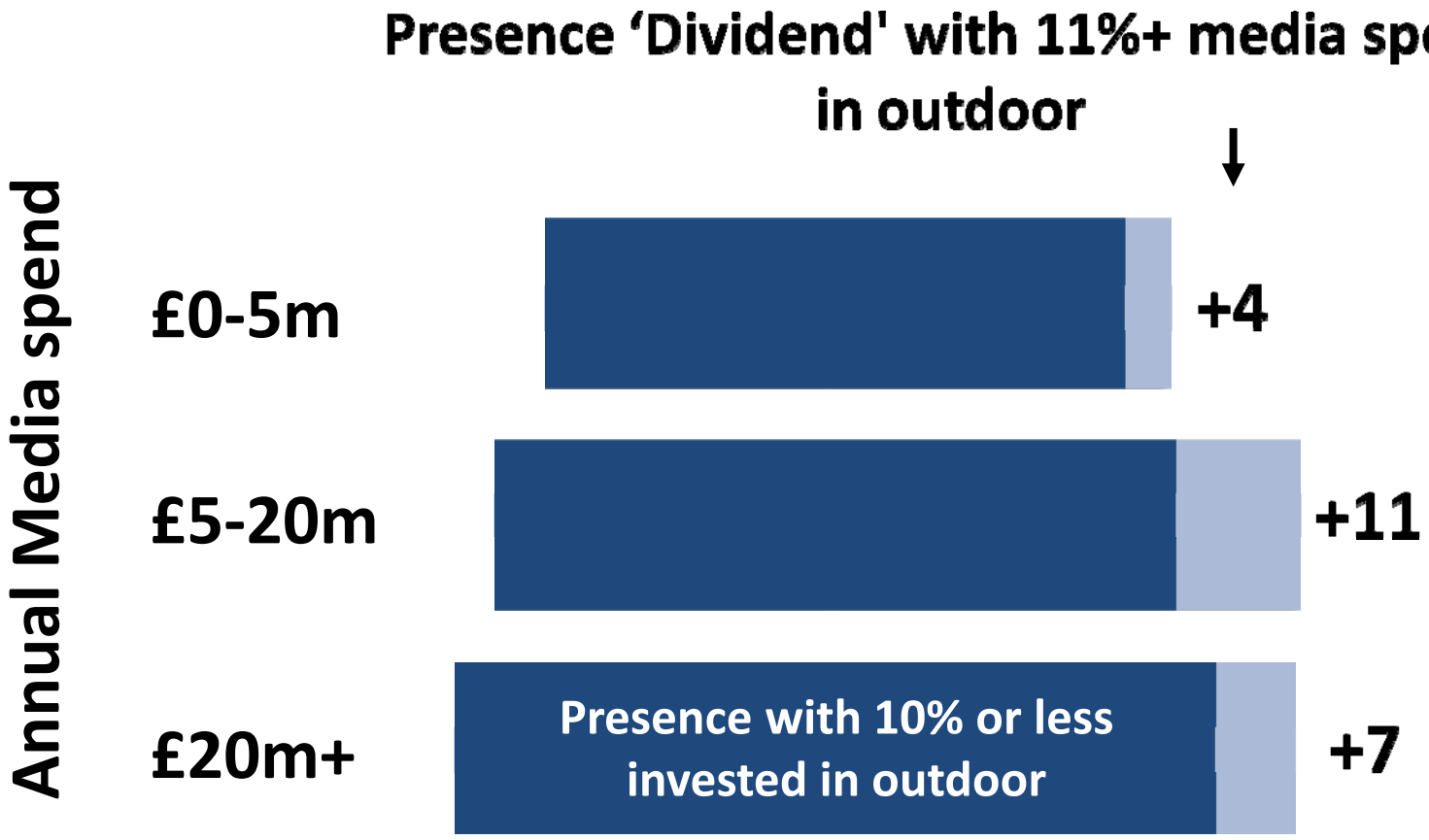
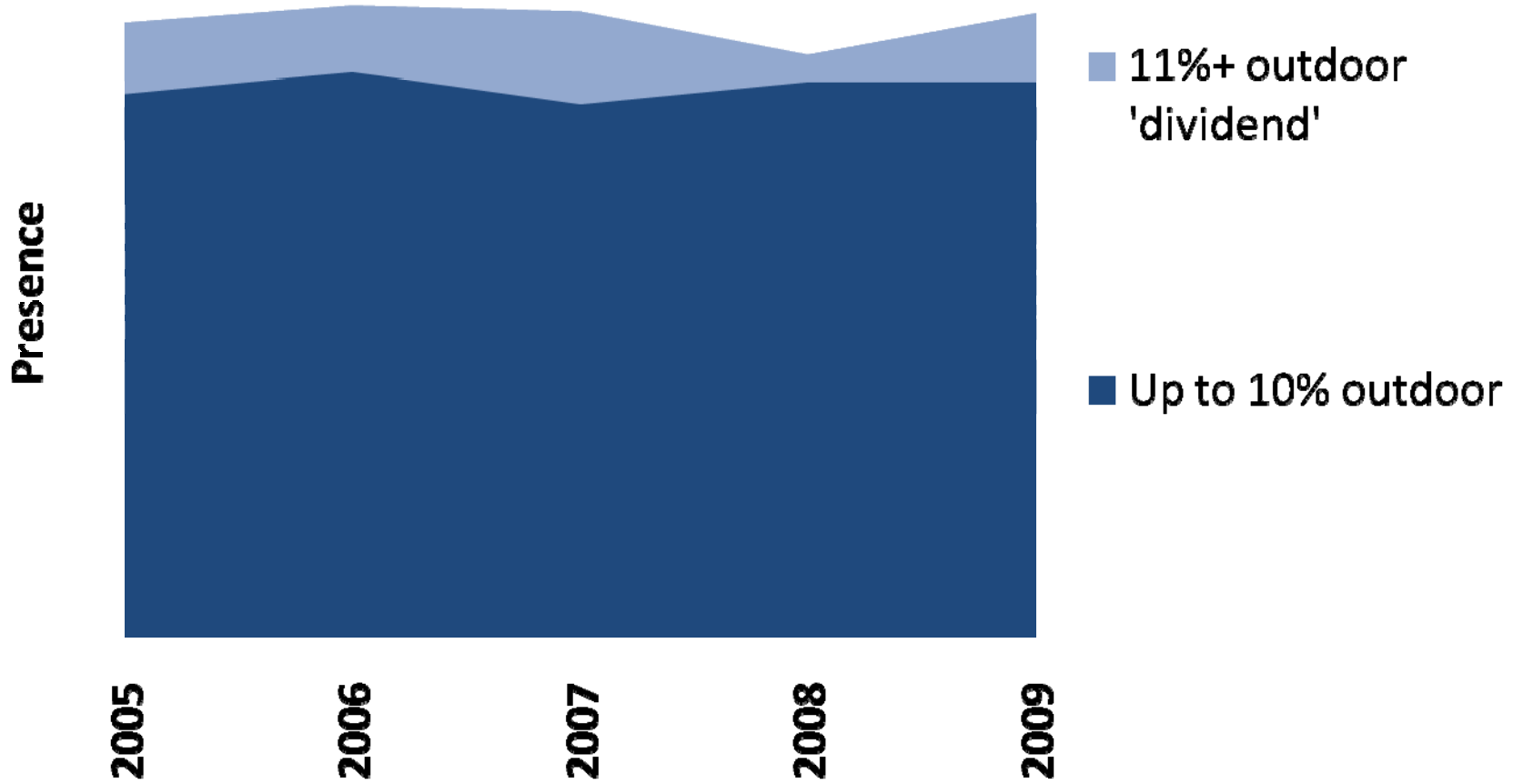


Source: Mindshare/ Millward Brown/ The Nielsen Company – 2009 BrandZ data

The dividend is consistent over five years of analysis

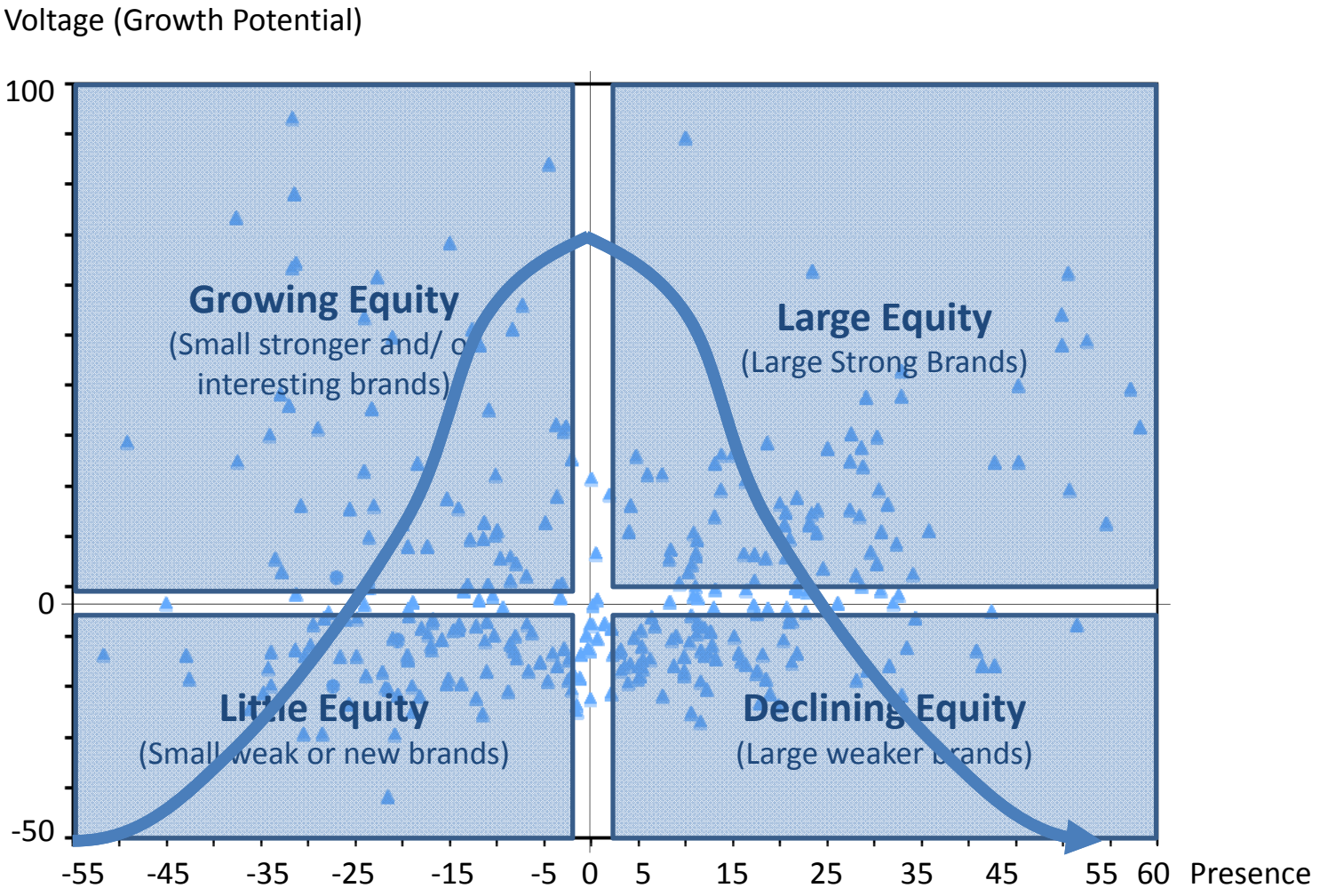


Source: Mindshare/ Millward Brown/ The Nielsen Company – All spending brands

Sony Ericsson

OUTDOOR IS LINKED TO THE DEVELOPMENT OF CHAMPION BRANDS

Brands can be clustered into typologies



Source: Mindshare/ Millward Brown BrandZ / The Nielsen Company

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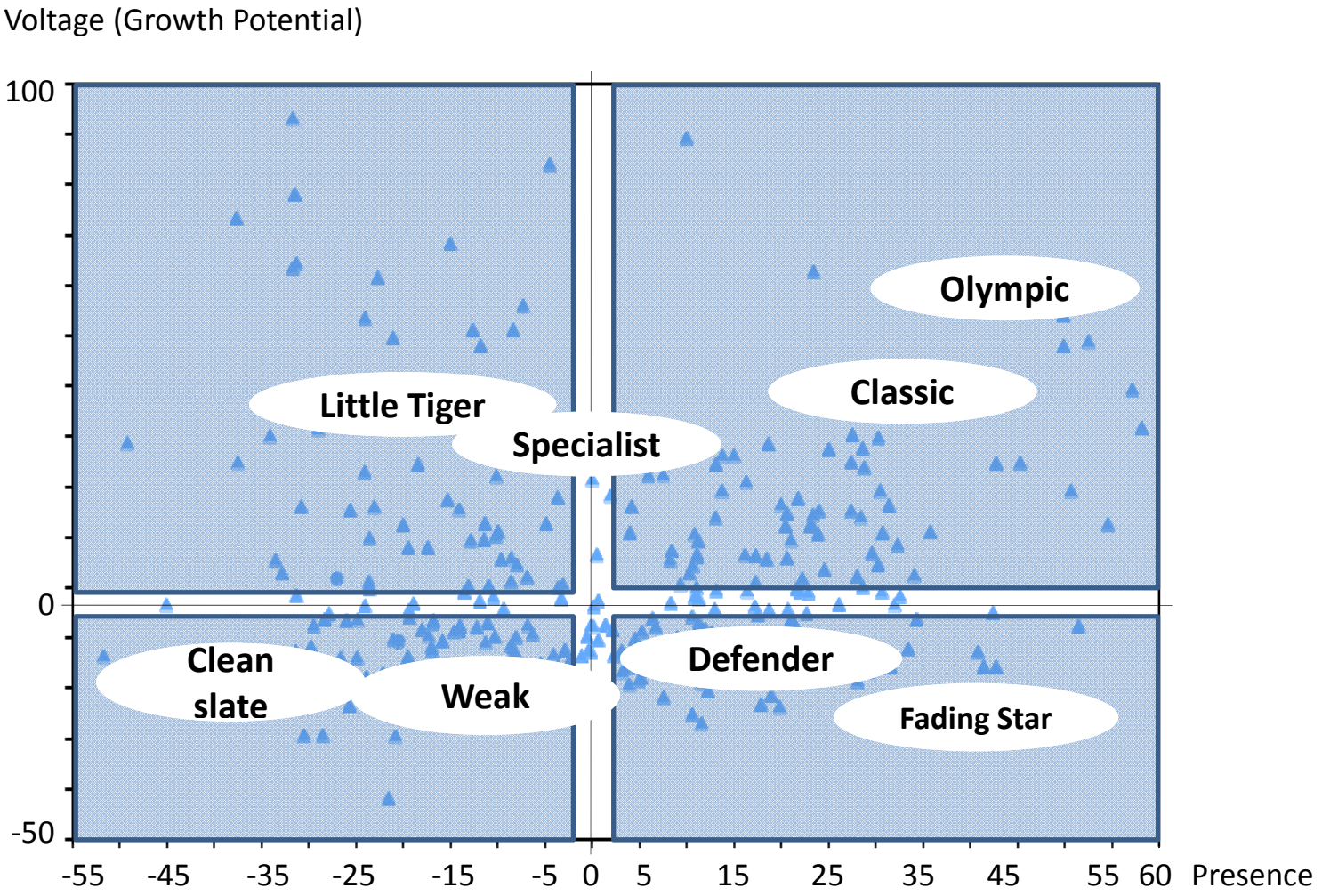
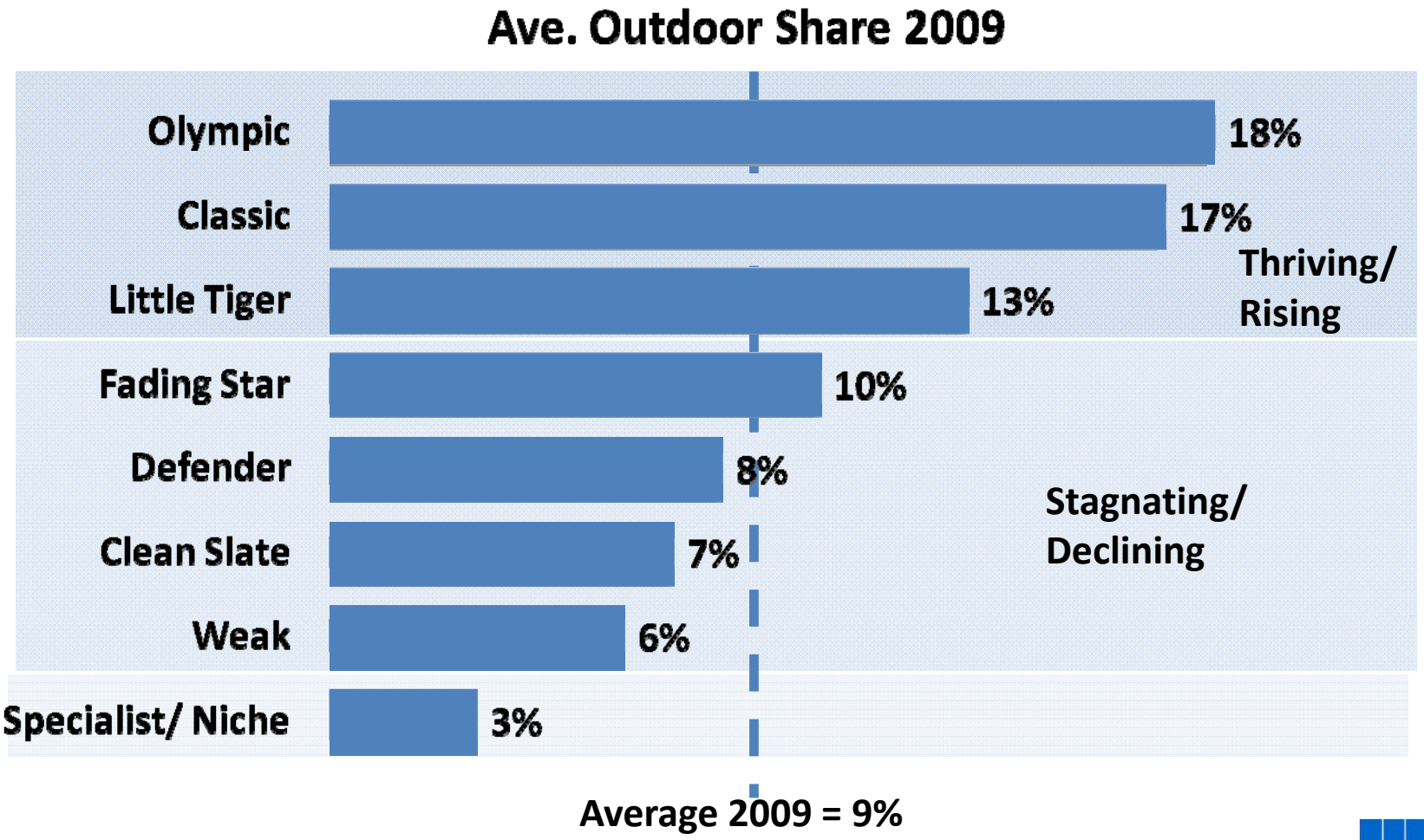


Source: Mindshare/ Millward Brown BrandZ / The Nielsen Company

Stronger brand typologies spend a higher share in outdoor



Source: Mindshare/ Millward Brown BrandZ / The Nielsen Company

CLASSIC, OLYMPIAN AND LITTLE TIGER OUTDOOR INVESTORS

BRANDZ™

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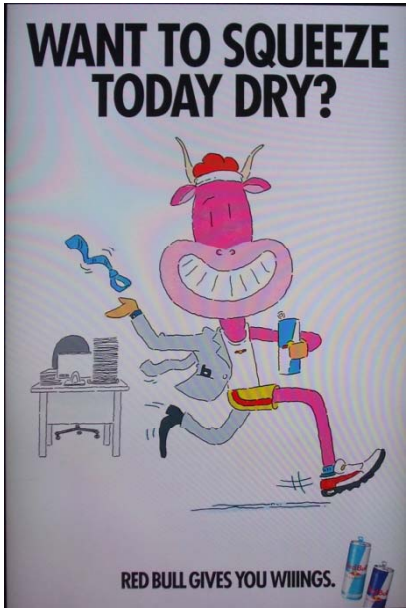
WANT TO SQUEEZE TODAY DRY?
RED BULL GIVES YOU WIIINGS.

Leather jacket
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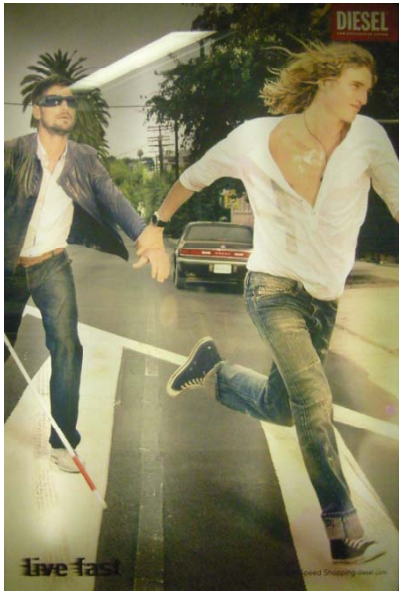
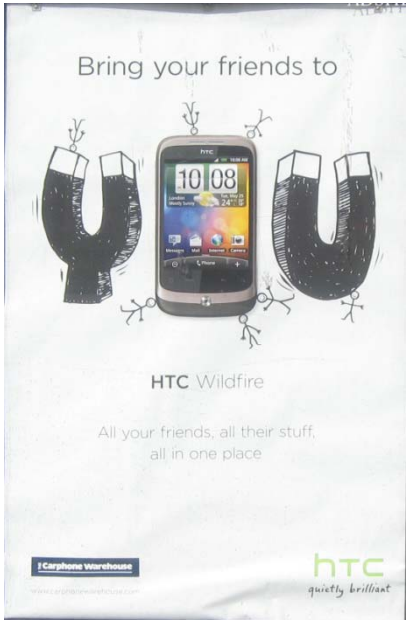
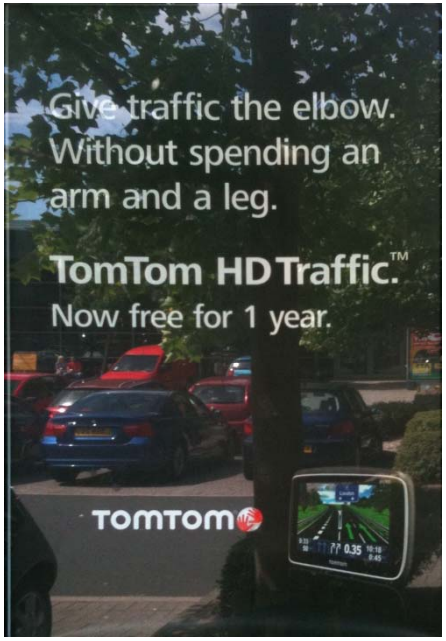
IN STORES MARCH 22ND
H&M


DIESEL
live fast


Bring your friends to
HTC Wildfire
All your friends, all their stuff, all in one place
htc
quietly brilliant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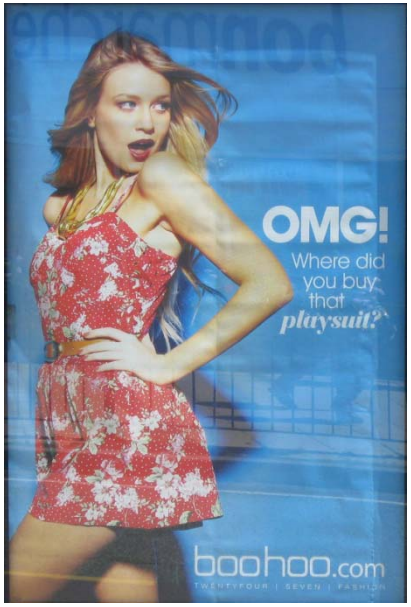
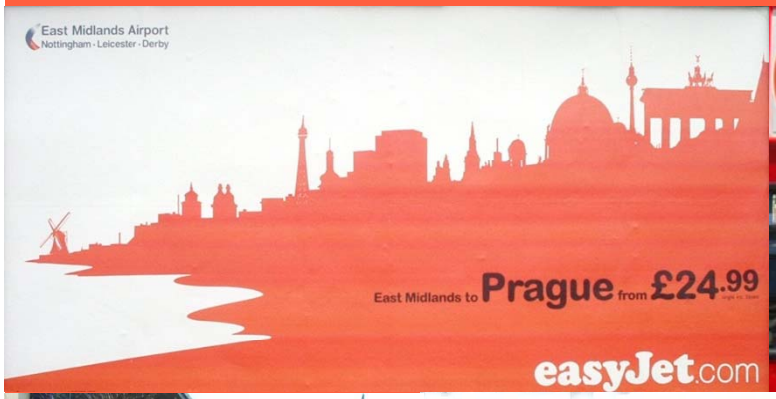

OMG!
Where did you buy that playsuit?
boohoo.com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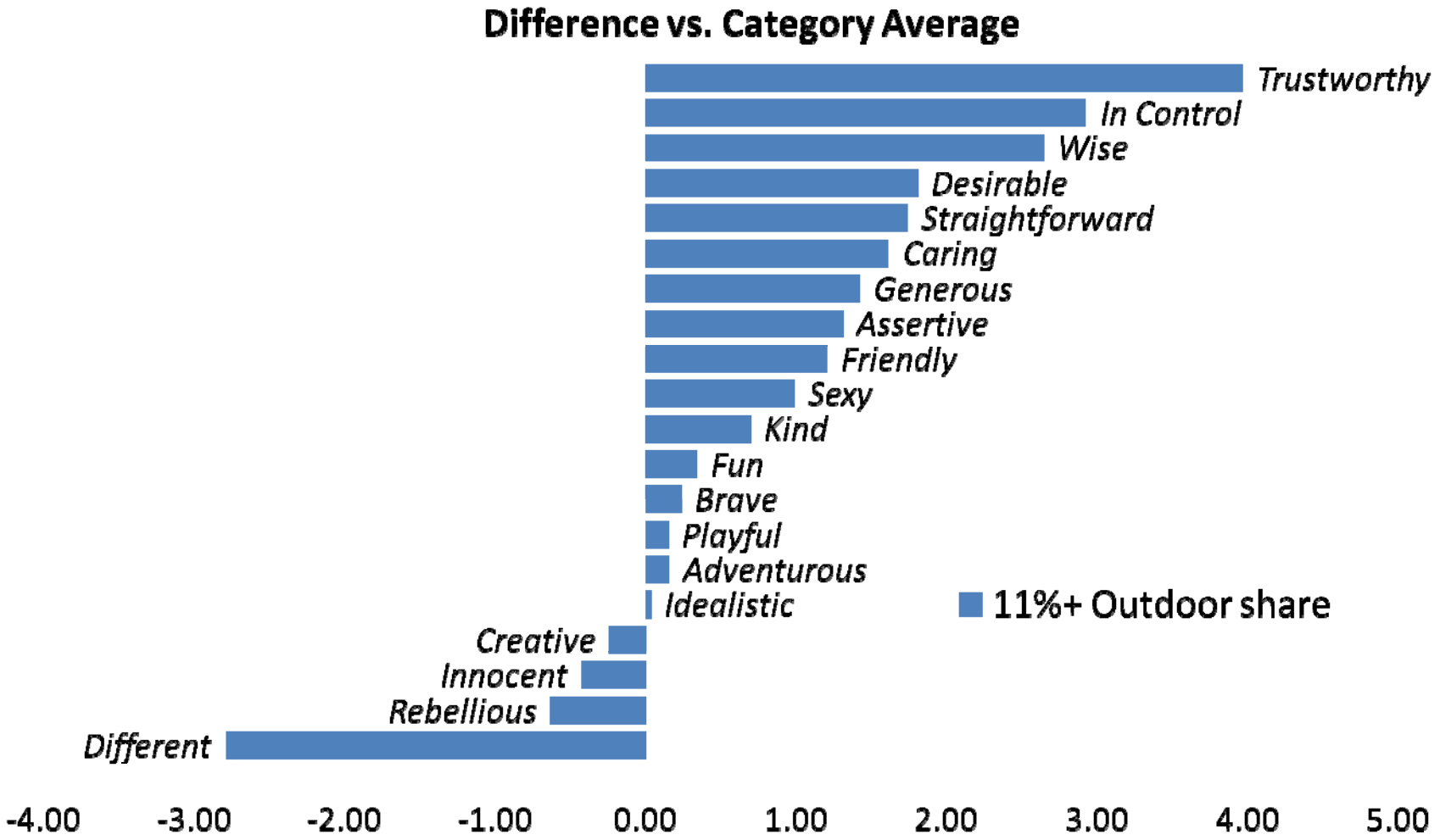
We can use BrandZ to understand brand personalities

Outdoor generates personality



Source: Mindshare/ Millward Brown BrandZ / The Nielsen Company

OUTDOOR

DRIVES SEARCH

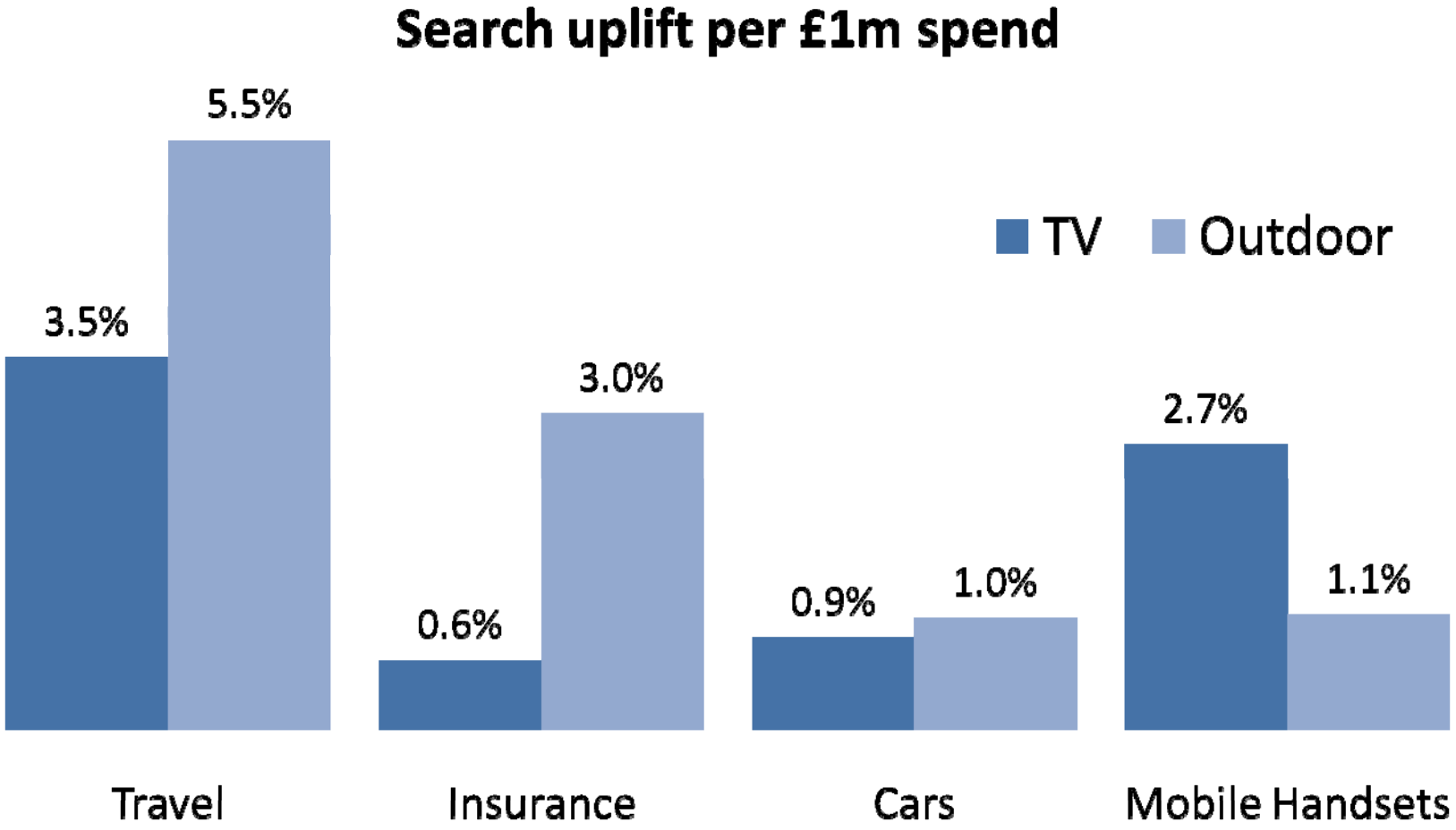
We modelled search behaviour across four categories: insurance, cars, handsets and travel

Only TV and Outdoor were found to drive search

	Statistically significant impact on search?
Outdoor	✓
TV	✓
Radio	-
Press	-

Source: Mindshare/The Nielsen Company/ Google Insights for Search

In three out of the four categories, outdoor delivered a more cost effective impact on search than TV



Note: Press and Radio were found to be insignificant within the modelling.

Source: Mindshare/The Nielsen Company/ Google Insights for Search

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Outdoor sustains strong brands and grows younger brands

Outdoor brands are more confident

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The Brand Building Power of Outdoor

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