STANDING ON THE SHOULDERS OF GIANTS

INTERNATIONAL EDITION

#OOHGIANTS
A world-first research publication into the international effectiveness of out-of-home

This is a new international version of the same research first released by Rapport UK in January 2018. The original research focused solely on UK case studies and can be downloaded here: **www.rapportww.com/giants**

This new research builds on that analysis – using the same dataset and methodology – but now incorporates international case studies from markets including **Australia, China, Germany & Malaysia** as well as the UK.

These cross-market learnings have led us to understand that while overall performance will vary between market – based on the reach and quality of OOH available – the way in which OOH works is consistent around the world, influencing the same brand and business metrics.
WHAT DID WE WANT TO LEARN?
3 KEY QUESTIONS

HOW DOES OOH WORK?

HOW EFFECTIVE ARE CAMPAIGNS THAT USE OOH VERSUS THOSE THAT DO NOT?

HOW DOES OOH AMPLIFY OTHER MEDIA?
THE DATA SOURCE

36 YEARS OF ADVERTISING EFFECTIVENESS
2,000 CASE STUDIES
5 OOH MARKETS ANALYSED FOR INTERNATIONAL LEARNINGS
#1 DATABANK FOR EXTENSIVE COMPARABLE DATA

IPA
EFF
Rapport
THE ANALYST
PETER FIELD
METHODOLOGY: POWER-USERS VS. NON-USERS

OOH POWER-USERS
15%+ OF TOTAL BUDGET

62 CASES

VS.

NON-USERS OF OOH
0% OF TOTAL BUDGET

109 CASES

Source: IPA Databank case studies 2004-2016
CREATING A LEVEL PLAYING FIELD

DISADVANTAGE FOR OOH
- low ESOV
- lower use of TV
- more short-term cases

ADVANTAGE FOR OOH
- more service sector brands

Source: IPA Databank case studies 2004-2016
HOW ARE THE MOST EFFECTIVE BRANDS USING OOH?

Source: IPA Databank case studies 2004-2016
HOW DOES OOH WORK?

OOH BOOSTS BRAND STATURE & FAME

+ 62% ESTEEM

+ 50% FAME

Source: IPA Databank case studies 2004-2016
HOW EFFECTIVE IS OOH?

OOH Power-users deliver stronger long-term business results

Source: IPA Databank case studies 2004-2016
HOW EFFECTIVE IS OOH?

OOH POWER-USE BOOSTS SHORT-TERM SALES

+ 22%

UPLIFT IN SALES ACTIVATION EFFECTS VS. NON- USERS

Source: IPA Databank case studies 2004-2016
How effective is OOH?

Maximise short-term sales with sales activation messages

<table>
<thead>
<tr>
<th></th>
<th>Brand-Building</th>
<th>Both</th>
<th>Sales Activation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Percentage</strong></td>
<td>30%</td>
<td>33%</td>
<td>64%</td>
</tr>
</tbody>
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Source: IPA Databank case studies 2004-2016
BEST-PRACTISE IN OOH MIX BRAND + SALES ACTIVATION FOR BEST LONG-TERM RESULTS

Source: IPA Databank case studies 2004-2016
HOW DOES OOH AMPLIFY OTHER MEDIA?

OOH BOOSTS BUSINESS EFFECTS OF ALL CHANNELS

- PRESS: +11%
- RADIO: +12%
- TV: +21%
- ANY ONLINE: +31%
- SOCIAL: +56%
- SEARCH: +80%

Source: IPA Databank case studies 2004-2016
OOH POWER-USE BOOSTS **BRAND** EFFECTS

**BRAND EFFECTS**

- **FAME**: +96%
- **ESTEEM**: +73%
- **TRUST**: -24%
- **ESTEEM**: +106%

Source: IPA Databank case studies 2004-2016
OOH POWER-USE BOOSTS BUSINESS EFFECTS

Source: IPA Databank case studies 2004-2016
CONCLUSION: WHAT DID WE WANT TO LEARN?

3 KEY QUESTIONS

HOW DOES OOH WORK?

HOW EFFECTIVE ARE CAMPAIGNS THAT USE OOH VERSUS THOSE THAT DO NOT?

HOW DOES OOH AMPLIFY OTHER MEDIA?
WHAT DID WE LEARN?
3 KEY ANSWERS

1. OOH adds stature & fame to campaigns.
2. OOH power-users are more effective at delivering business outcomes.
3. OOH boosts the business effects of all other media—especially online.
Whether you’d like to arrange a presentation of our research, have some questions for us, or if you’d just like to explore how Rapport can help improve the effectiveness of your Out-of-Home communications, we’d love to hear from you.

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