

Measuring the value of digital out-of-home advertising

New research proves that digital posters attract more eyeballs and longer attention than static formats, says **Nick Mawditt**, Kinetic

FORMATS SUCH AS DIGITAL escalator panels and cross-track projection on the London Underground, plus emerging new roadside formats, have helped to grow digital out-of-home (DOOH) media in the UK from a value of £45 million in 2007 to £64 million in 2008.

In 2009, it is predicted to grow by around 25%, in direct contrast to the rapid contraction experienced by other media.

Outdoor contractors have rapidly developed a significant DOOH estate, but this exponential rate of growth has led to a gap between product development and substantive knowledge of the medium's value to advertisers in comparison to static poster formats. If the medium is to continue to develop, it is important to address this knowledge gap to understand its role on media schedules, and to justify its price premium.

In February 2009, out-of-home communication agency Kinetic implemented a study to measure the real impact of DOOH in comparison to traditional static posters. The research, conducted in conjunction with Titan Outdoor and digital creative services agency Grand Visual, used leading-edge, non-intrusive, eye-tracking technology from Tru Media.

The aim of our research was to identify and quantify the effect of moving images relative to traditional out-of-home. We had to address whether digital is worth its price premium, whether or not more people look at digital panels than traditional posters, and what the differences are between the ways the panels are viewed.

We used non-intrusive eyeball tracking of a real-time campaign in a real environment, measuring moving people's reactions, and putting attention levels into the context of actual footfall over a period of time.

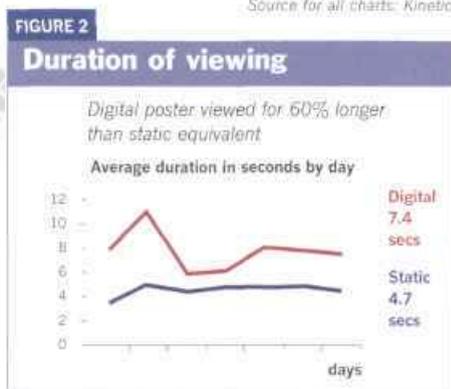
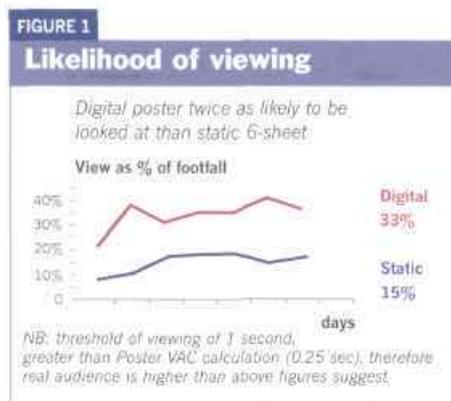
Methodology

The research, conceived and designed by Kinetic, was conducted at London Bridge railway station, using adjacent Titan Outdoor static (six-sheet) and digital (D6) panels on an indoor thoroughfare to compare viewing and attention levels against actual footfall across 11 days of activity.

Cameras, tracking the number of eyes



Left and opposite: digital ads at a busy rail terminal. Looping different ads has been found to increase the attention of passers-by



on the posters, were mounted on the poster units to measure the reactions of moving people, who were unaware that the research was being conducted. Separate cameras were used to measure footfall and the direction of passers-by. Using technology developed by Tru Media, the research was able to identify how many people looked at digital compared with static creative executions, and for how long, in a real-life, real-time situation.

The measures included footfall count - how many people, and in what direction - and an eyeball tracker, measuring people's fixed attention to each panel. The threshold used was one second, but the cameras used facial focus technology (developed for the security industry) to include people only when their viewing was fixed on the panel, determined by facial positioning from a distance of up to six metres.

Three different versions of a digital poster were run, all for Tigi, a professional haircare product that has not traditionally advertised out-of-home. The first execution was static; the second had the copy and packshot animated; the third showed all aspects of the artwork with more extensive movement. The copy used was designed for the test by Grand Visual. The standard poster creative was strongly aligned to the digital version.

Data was delivered dynamically on an hourly basis across the n-day period, and at the end of the period we were able to analyse the behaviour of a total of 155,000 individuals. Measures included the number and percentage of people passing who viewed the poster, and the duration of that viewing. Observations were made on time of day, peak versus off-peak comparisons, weekday versus weekend, and the levels of animation-affected attention.

Research findings

Data showed that the digital poster is twice as likely to be looked at as the static six-sheet version, averaging one third, but rising to 40% on 'quieter' days.

At its peak, the viewing propensity for digital is up to three times that of a static poster (Figure 1).

In terms of duration, the research found that people looking at the digital panel did so for an average of 60% longer than the static, and up to twice as long at certain times (Figure 2).

These findings allow us to understand more about the advertising value of digital panels above and beyond the creative

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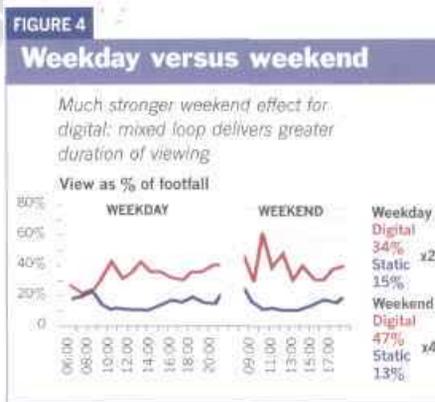
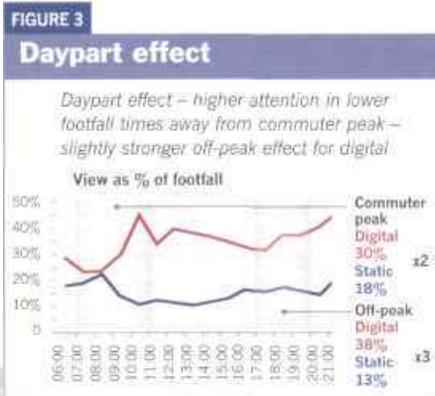
flexibility they offer. By capturing twice as many people viewing - and for longer - we can estimate the advertiser value offered by a digital panel within a loop reel of, say, four to five advertisers. To do this, we assumed a hit rate per reel of one to two, thus dividing the cost by 1.5 or two, but then multiplying it by the digital impact (+60%), or 1.6. So, the current UK pricing model seems to justify the medium's value, given that the average dwell time for panels would assume most people have an opportunity to see one to two pieces of creative. Further analysis can be done relative to specific conditions.

We found some noteworthy additional observations surrounding the animation effect of the tested ads. Using three different digital creative executions - one effectively static, one with some basic animation and one with more elaborate animation, introducing a new dimension to the ad - we could go some way towards deducing the optimum level of creativity for the DOOH format and how we can plan and use the format from a tactical perspective.

Even basic, non-animated, digital copy performs well, but animated digital copy increases attention by 28%, and a digital ad with a basic level of animation is over 150% more likely to be viewed. However, after a certain level of animation, additional movement appears to have no extra effect on attention levels. More research is needed in this area to understand the implications fully, as this particular study did not focus on this issue.

The research also found that increasing the number of advertisers on a digital panel (to more than one) increases the proportion of people looking at it and, particularly, the duration of their attention. A mixed loop delivers greater duration of viewing.

The research also identified differing behaviour at different times of day and on different days of the week (Figure 3). Across the day, there are clear differences, both during off-peak times and the evening commuter peak versus the morning. The average off-peak differential rises to a factor of three when looking at numbers of people interacting with the digital



panel versus the static one. This analysis demonstrates a number of factors at play: that morning peak behaviour is different to evening peak; and that a possible combination of mindset and concentration of travel behaviour are restricting attention.

There is also a general difference between weekday and weekend behaviour (Figure 4). The weekend audience has a much higher interaction with digital panels (nearly 50% on average) as

fewer people (dictated in this case by commuter footfall - a mall environment would differ) engage with the digital panels for longer.

In terms of awareness of the creative, recognition research conducted among users of London Bridge station showed that the presence of a digital as well as a static panel had boosted recognition significantly. There was 38% brand awareness of the Tigi Bed Head brand. Levels of both brand and advertising awareness were high among recognisers, and the creative execution was seen as clear, suiting the brand, and relatively persuasive, with 54% of respondents classifying it as 'outstanding'. These results are particularly impressive as an endorsement of the memorability of digital executions when you bear in mind that there were only two sites advertising Tigi in the station overall.

The essential findings of this robust and realHife study ensure we have a clear framework for our understanding of DOOH relative to the strategic media decisions of planning and buying.

Conclusions

This research helps our understanding of DOOH in the crucial area of real audience interaction and the value of the medium relative to standard out-of-home formats. Digital appears to justify its value, attracting more people (eyeballs) for a longer duration of viewing.

Twice as many people were found to look at a digital poster for an average of 60% longer than its static equivalent. This proves the format's value as it attracts more people (eyeballs) and longer duration viewing. With three to four advertisers on a typical loop, and given the propensity of an audience to be exposed to an ad within a loop, the impact per pound is roughly equal for the digital and static versions currently active in out-of-home.

The research is an important breakthrough in understanding how this flexible medium can work to engage people on the move. The findings can be interpreted for the relative impact of DOOH.



More on digital out-of-home at www.warc.com