



Europe on the Move

media on the move™



A traveller without observation
is a bird without wings.



Moslih Eddin Saadi
Persian poet
(1184 – 1291)

Foreword

We are all constantly on the move. Whether it be our work commute, a shopping expedition, or a leisurely weekend stroll, our regular journeys define the pace and narrative of our daily lives. Our journeys are linked to many important emotions – our sense of responsibility to our work and families, our individuality and personal interests. In a highly mobile population, how we travel says a lot about us.

Outdoor advertising speaks to people on these journeys.

Europe on the Move is a comprehensive study of the outdoor audience's behaviours and feelings whilst "on the move". It provides a deeper understanding of peoples' mindsets when they're out and explores how people interact, engage and view outdoor advertising.

The findings also tell us more about how technology is changing our relationship with outdoor advertising. We are in an era where "dead time" is dying. With smartphone use becoming the norm, technology is unlocking our productivity, allowing us to purchase, research, and share – wherever we are.

This report highlights the significance behind the key findings and includes the perspectives of CBS Outdoor experts, leading advertisers and technologists on what this means for advertising.

Ultimately, it provides a different perspective on the consumer and demonstrates that the outdoor audience is highly receptive, in action mode and, critically, responsive to advertising messages.

Europe is on the move. Let CBS Outdoor tell you all about it.

CBS Outdoor's Europe on the Move survey is a qualitative and quantitative study of 9,665 Europeans from six markets (the UK, France, Spain, Italy, Ireland and the Netherlands). The survey provides unparalleled insight into how people feel, what they think, and how they respond to outdoor advertising while "on the move."



Europe on the Move At a glance

Trying to capture the sheer volume of insights gathered from this study into one document would have been an impossible task. Instead, this report focuses on the key findings at a macro level taking you through progressive stages of detail and understanding – from the broad audience landscape, to individuals' moods and finally, to how people respond to outdoor advertising.

People on the Move:
Understanding the opportunity

Engaging on the Move:
Reaching the outdoor audience

Influencing on the Move:
Activating the outdoor audience

Section One

People on the Move: Understanding the Opportunity

The people who are out most are the people advertisers want to reach. They are high income households, impulsive spenders, technologically savvy and they don't try to avoid advertising. We take a look at European travellers in general and how their mode of travel can strongly influence their mood and behaviour. We also dip into the mindsets of people on the move to understand what drives certain behaviours.

34%
of Europeans describe themselves as impulsive spenders

Section Two

Engaging on the Move: Reaching the Outdoor Audience

Building on the findings from the previous section we report back on what our respondents told us "reached" them. What kinds of messages work best – and when? And, as most people are exposed to and engage with a "mix of media" – what was most effective? What does outdoor contribute to the mix?

Over **one-third** of train travellers said they read and notice advertisements while waiting for transport

Section Three

Influencing on the Move: Activating the Outdoor Audience

Finally, we explore how likely people are to act on advertising when they are on the move. Bottom line – outdoor advertising works. You can touch people on their path to purchase, when it matters most. And with the increased use of smartphones and other mobile technology, connected travellers are becoming increasingly more valuable as they research, buy, chat, and share with their fingertips. With outdoor, you can leave a lasting impact of your brand, and you can develop trust with your audience in a way that no other medium can.

59%
said they 'thought about' or considered buying a brand after seeing an outdoor advertisement

Methodology

Our full methodology is included in the appendix where you'll also find details of CBS Outdoor contacts should you wish to learn more. Alternatively, visit www.europeonthemove.com to download a copy of this report and access more content on the study.

9,665
respondents

6 markets

474 online
survey questions

3,002
mobile survey responses

289,950
minutes of internet research

Outdoor: what you may not know...

Outdoor advertising has one of the longest histories in reaching and influencing people. In many ways, it is the last true broadcast medium. But, it's also a medium that has continued to evolve and is increasingly sophisticated in how it reaches and impacts audiences.

Outdoor delivers as a mass medium and still has the unique ability to reach a tightly focussed audience – irrespective of the demographic profile.

We know where the people you want to reach are and we have the insights to help you speak to them directly.

67%

of consumers have acted as a direct result of seeing an outdoor ad and we know how and when they respond to different categories.

People who are outdoor most are the people who are most likely to buy your products.

Highly mobile people are more likely to have higher household incomes and be the main household spenders.

79%

of frequent travellers reported going shopping at least three times a week.

People pay attention to outdoor advertising when they are on-the-go.

People are more alert when they are out and therefore are more likely to seek out information from advertising.

45%

of people who multi-task on-the-go, report doing on average 9 activities during travel – including reading outdoor advertising.

Outdoor advertising leads to sales.

Outdoor is the “last mile” in advertising – allowing you to reach people on their path to purchase as well as inspire impulse buying.

26%

of people said they regularly stop for “top up” shopping while on the move.

Outdoor advertising ranks among the lowest in ads people want to avoid!

People tend to find outdoor advertisements a welcome distraction and, unlike other forms of advertising, don't try to avoid it.

58%

of people reported consciously looking at outdoor ads, a higher engagement rate than any other form of advertising.

What people told us...

Here's what the people participating in the study had to say:



Outdoor leads to purchase:

"I liked this ad because it had a big picture that made you want a donut and had details of where the shop was. So, if you happened to see it and fancy one, you knew the shop was not far!"

Dean, UK, 33 years

People count on outdoor ads:

"I might miss the sale paper but still know if the shop has a sale on just by glancing at their window. I would really miss the ads if they were gone. I kind of depend on the advertising to know where I can get a bargain and to compare prices."

Sarah, ROI, 29 years

Outdoor taps into impulse:

"If I am on my way into a supermarket/convenience store, and I see an ad for something, I am much more likely to (a) remember it and (b) try it than if I saw it on the television. Also, depending on the product being advertised, and the mood I'm in, I might be more tempted to buy it."

Stephen, ROI, 44 years

Outdoor is a welcome distraction:

"When hanging around at the bus stop I spend the time looking at ads. I'm likely to be so bored while waiting that I'd even read all the small print."

Fabio, Italy, 48 years

Outdoor is an critical part of the media mix:

"You've already heard it on the radio or TV, then you see it and notice it when you're out and about, eventually when you're making a purchase, it's always the first to come to mind."

Juan, Spain, 36 years



Section One

People on the move

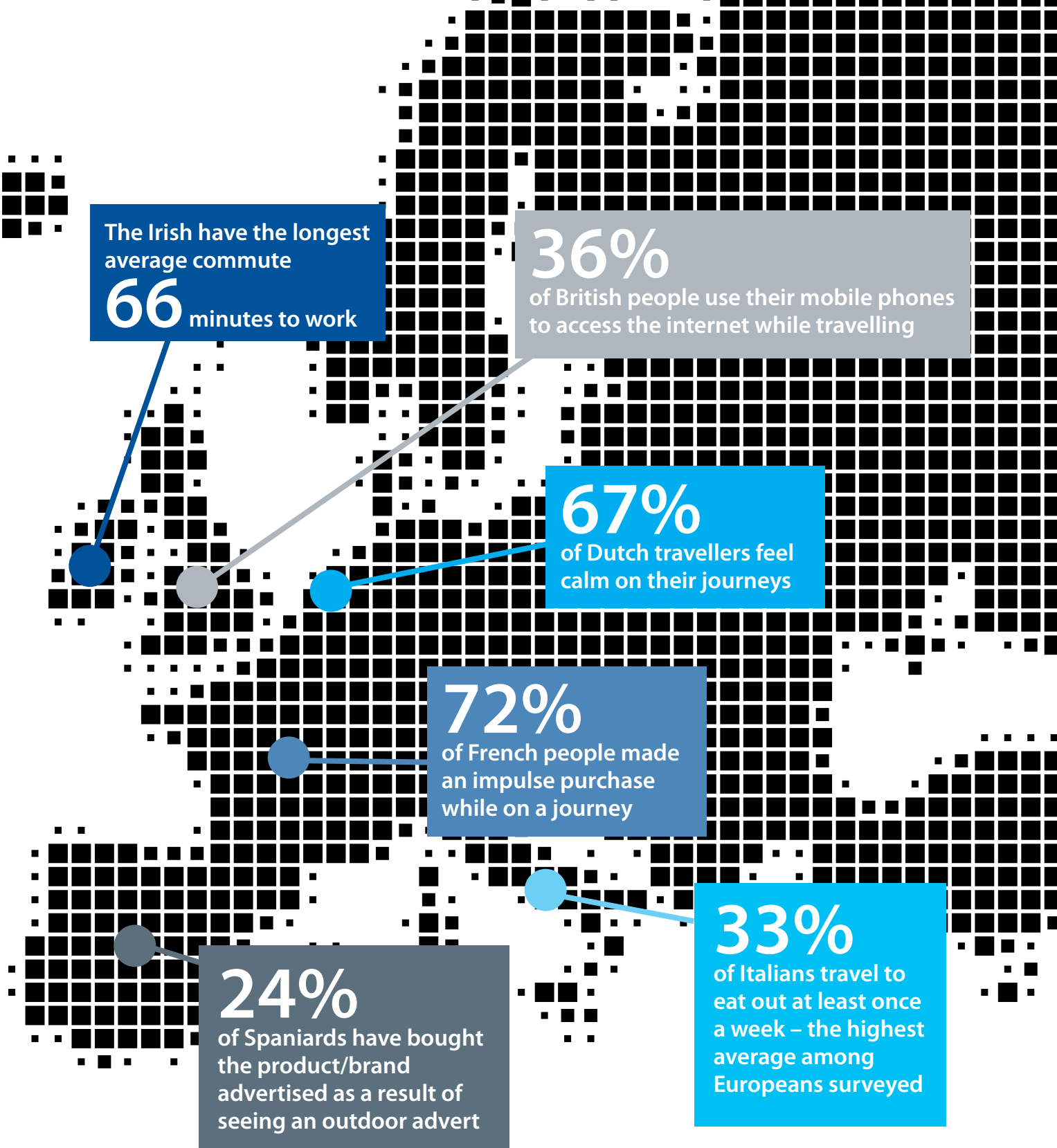
Understanding the Opportunity



Today, there is a revolution happening in the way that people think about travel. Travel is so much more than a way to get from A to B, everyday journeys deserve to be thought of as an individual event in their own right.

So why is this important? Well in the highly mobile society we now live in, understanding mobility and the way people travel is essential in understanding today's consumer, because today the every day journey plays a dominant role in all our lives.

The outdoor audience is the audience that advertisers want to reach. It is a highly desirable group with the majority of people tending to come from higher income households, more technologically savvy and more interested in what brands have to offer.



The size and nature of the outdoor audience – six markets

The markets deliver nearly 250 million highly educated people whose individual country GDP is well in excess of the European average. This wide and diversified audience spans from the most northern tips of the Shetland Isles in the UK to the southern coastline of Tarifa in Spain.

Country	GDP in Euro €*	Population**
France	1.98 trillion	61 million
UK	1.66 trillion	61 million
Italy	1.61 trillion	58 million
Spain	1.12 trillion	47 million
Netherlands	609 billion	17 million
Ireland	169 billion	4 million

*Source: IMF (2009)

**Source: Nationmaster (2008)

The more we're outdoors...

...the more brands want to reach us

People who spend a lot of time out of home:

- Have higher incomes (51% over €30,000)
- Work full time (56% vs. 41% of the population of the six markets surveyed)
- Have children (70% vs. 42%)
- Have bought something on impulse in the last week (42% vs 34%)
- More likely to pay attention to outdoor advertising (63% vs. 58%)

...and the easier we are to reach

- Europeans are going out regularly to spend, with 95% saying they travel at least once a week for shopping
- 90% of frequent travellers regularly commute to work, and they remember seeing ads (47%) and were more likely to buy a product they saw advertised (24%)
- 1 in 4 highly mobile people admit to being influenced by advertising to buy something and 1 in 3 say they buy new products and brands to "try" them out

...the more we share behaviours

- Only 47% of full-time workers travel time is spent commuting. The rest is spent either shopping, visiting friends and family, doing the school run or socialising
- When travelling, Europeans described themselves most as "energetic," (20%) and "stimulated" (18%)
- 34% of Europeans described themselves as impulsive spenders and 12% make "a few" impulse purchases in a week
- In any given week, Europeans go out at least 11 times – to do anything ranging from visiting friends, shopping or going to work
- We cover a lot of ground when we travel – an average of 46 km on our main daily journeys!



“

Outdoor advertising makes our streets, towns and cities more colourful and fun. Sometimes an advert can make you smile when it's most required on a boring or stressful journey.

Shaun, UK, 44 years

”

The European Mood:

Travel Nationality

Although the study did not focus on individual country differences, as part of the research, interesting patterns emerged that highlighted cultural similarities – which indicates a clear “European traveller mood and behaviour”.

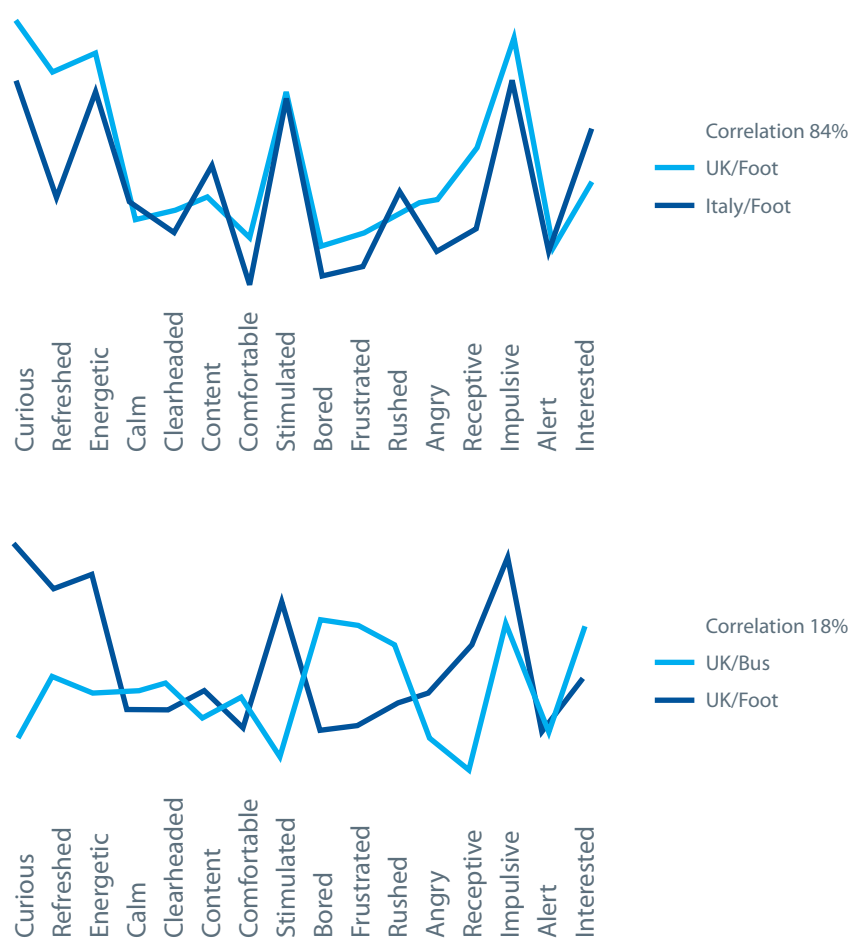
Mood and behaviour is strongly linked to mode of travel – so much so, that it can tell us more about a person’s mood than their nationality.

In the graph we see that two walkers from the UK and Italy display a much higher correlation (84%) than two UK travellers on two different modes of transport.

This significant difference in the strength of the correlation was demonstrated multiple times throughout the survey. For example, two car travellers (one from the Netherlands and one from the UK) show a 70% correlation in their moods versus a –11% correlation for a UK car traveller and a UK bus traveller.

Why does this matter? It tells us that the recorded moods are consistent across geography, which means that mode of travel offers a unique insight into behaviour that is often discounted. Also, it tells us that pan-European campaigns can be strengthened through mode-specific campaigns that target your audiences in a way that speaks directly to their mood – no matter what country they are in.

The way you travel is a stronger indication of your mood and behaviour than your nationality.





“

Yesterday during a short journey I saw advertising in bus stops and Mupis – it was something like “your blood is necessary, donate” – which had already been broadcast in TV and published in newspapers.

”

Gonzalo, Spain, 19 years

Mode and Mood:

Understanding the European traveller

Our findings show that the preconceived notion that consumers on the move are bored, angry, rushed and frustrated is only partly true and not overriding. No matter the mode of transport, or the nationality, people generally reported feeling “calm” and “content” most often on their journeys. In fact, the most commonly reported mood was “calm,” for all modes of transport except trams – which reported “content” as the most common emotion.

However, whilst most travellers report feeling calm and comfortable on their journeys, the reported moods with the highest uplift from the average tell us a little more about travellers by highlighting the moods that differentiate them the most. In other words, what was the other mood that stood out among travellers on a particular transport? For example, on buses and trains the highest reported mood was “bored”, indicating that these travellers are more likely to be seeking something on their journeys that sparks interest and engagement. Whereas tram riders report “frustration” and will more likely respond to being actively drawn into a message to provide a distraction.

A negative mood is not necessarily a bad thing...

Psychologists at the University of California have conducted several studies that conclude that advertisers can positively benefit from people’s desire to be distracted – leading to improved recall and perceptions of a brand.

One particular paper by Hadjimarcou and Marks (1993) conceptualises mood as a pre-existing state that subjects bring to the ad processing domain. They believe that “the overriding goal of people while in a negative mood is to use any means possible to elevate their mood.” This mood management perspective is based on the premise that consumers in a negative mood will be motivated to process ad information in the hope of improving their current mood whilst those in a positive mood will be less motivated to process the information, and their evaluations will be less strongly influenced by their mood.

Nearly **45%** of respondents said they regularly did up to nine different activities while on the move

The authors find that evaluations of a “feel-good” (mood elevating) product are more favourable for subjects in a negative mood relative to those in a positive mood, supporting the mood management hypothesis.

Interestingly, this conclusion would also suggest that advertisers have to work harder when using other media where viewers/readers tend to be in a positive or relaxed mood – as they do not need to actively seek out something that may elevate their mood.

Mode of transport	Car	Train	Bus	Tram	Foot
Mood with highest uplift from average	Comfortable +5	Bored +17	Bored +7	Frustrated +13	Energetic +7 Stimulated +7

What are we doing?

Busy, multi-taskers

European travellers also engage in a variety of behaviours while they travel. Simply participating in the journey is not enough and 21st century Europeans arm and equip themselves to maximise the usefulness of their time. Whether it's reading the newspaper, listening to the radio, or using their mobile phones, it is evident that European travellers are multi-media consumers and multi-tasking individuals.

However, as we can see by the "top 5 activities" listed here, regardless of what respondents reported doing or seeing, outdoor advertising featured prominently.

Top 5 activities on the move

1. Listening to music/radio
2. Spoke to friends who were with you
3. Saw advertising on posters or billboards
4. Thought about everyday products I needed to buy
5. Thought about planned work

Top 5 activities whilst waiting for public transport

1. Saw advertising on posters or billboards
2. Listened to music
3. Texted using a mobile phone
4. Read a newspaper or magazine
5. Spoke on a mobile phone





“

When I take the bus I always notice the boards at the stops and on the outside of the bus. If I get a seat and manage to get a window I look at the billboards along the journey.

Enrique, Spain, 25 years

”

Compared to their fellow Europeans...

These insights provide just a snapshot of the information we have gathered into the outdoor audience, their moods and behaviours. We have collected and analysed a significant amount of data – at both a pan European and individual country level – and would be happy to share these findings with you in more detail.

British

Travellers are the most frustrated

12%

44%
of British travellers eat and/or drink on the move.

French

Travellers are the most impulsive spenders

38%

31%
have spoken about an outdoor ad to someone else.

Dutch

30%
use their bike at least 5 days a week.

The calmest,
67%
and the most happy
94%

Italian

33%
said they eat out at least once a week – highest average among Europeans surveyed.

Most annoyed with fellow passengers
27%

Irish

67%
said they would be “lost” without their mobile phone.

The most influenced by advertising
28%
and tend to notice it more
21%

Spanish

Least likely to avoid OOH

34%

Most likely to respond to a special offer

41%

Section Two

Engaging on the move

Reaching the outdoor
audience



58% of respondents reported consciously looking at out of home ads, a higher engagement rate than any other form of advertising.

And, it will be no surprise to hear that they also told us that their moods change during the day, affecting their mindset and behaviours. In particular, we identified consistent patterns to the kinds of things people think about – providing a clear opportunity for outdoor to engage audiences.

So, what kind of messages work best – and when? Our study found that people welcome advertising particularly when it is interesting, funny, a good distraction, or informative. Of course, outdoor is a medium that doesn't need to be as concerned with ad avoiders – as it's both one of the hardest forms of advertising to avoid, and one of the least disliked. But what did respondents report back and what really caught their attention?

Finally, as most people are exposed and engage with a “mix of media” – what was the most effective combination? What does outdoor contribute to the mix?

All minds think alike?

It's understood that travellers have herd instincts, their thoughts preoccupied by many of the same things at any given time of day. Europe on the Move has tracked these collective mood swings in detail. Our respondents told us their thoughts wander continuously throughout the day and clear patterns emerged, largely determined by the time of day and their environment. This chart maps common thoughts by time of day, and shows that there are specific opportunities for advertisers to tap into – from the desire to escape to more basic needs, like eating and watching TV. The strength of the synchronicity is remarkable.

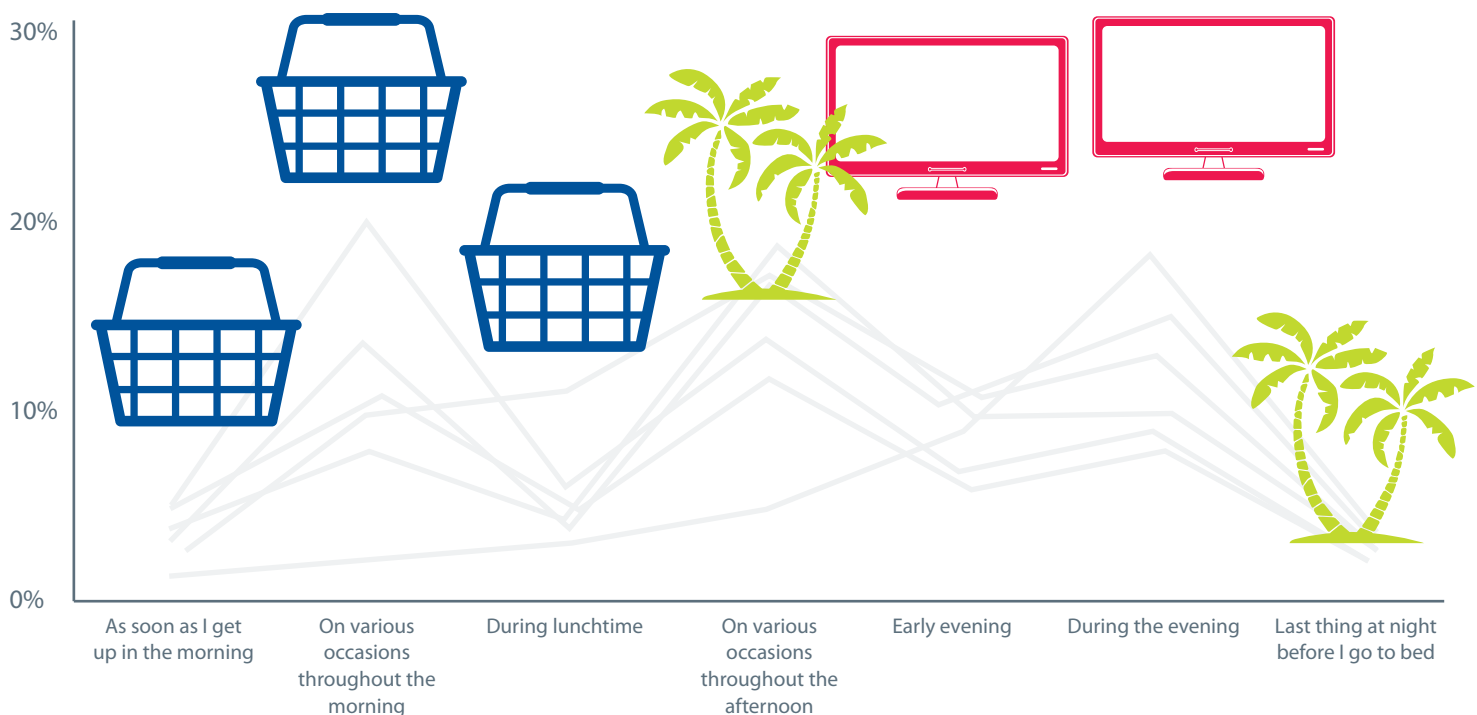
“

I realised that some of these ads had “reached” me without me really noticing them. I know them without really having seen them, after just barely having caught sight of them.

Francois, France, 52 years

”

By overlaying “time of day” thoughts with location-based insights on where people are travelling to and from throughout the day, we can begin to better understand how outdoor can reach target audiences.



Key:



Shopping



Holiday



Television

Hungry?

28% of people think about groceries in the morning.



What's on TV?

The majority of respondents (57%) think about TV programmes in the evening.



Get me out of here!

More respondents (40%) think about holidays while they are out in the afternoon than when they are at home in the evening (7%).



Entertain me!



John Lemon

“

The Esselunga print and billboard ads were great, rather unique and it still brings me out in fits of laughter: they twisted celebrities' names to advertise food produce. It was utterly simple but so clever! A white background, a lemon with round sunglasses and a name: John Lemon... brilliant! I thought the adman was a genius, he used the most ordinary things for the ads.

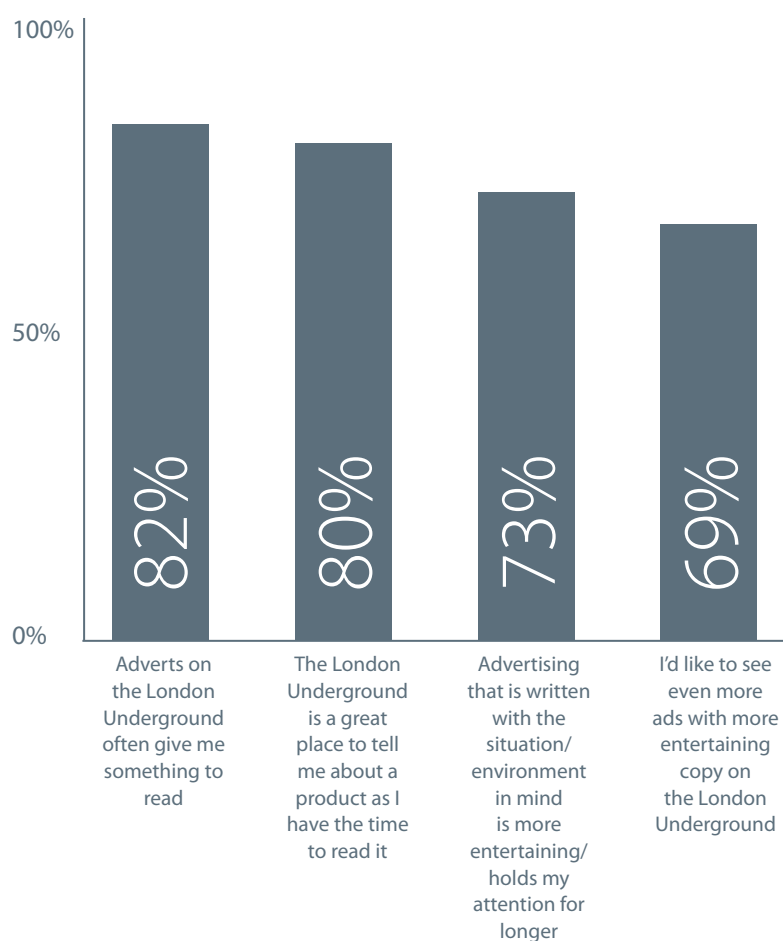
Anna, Italy, 44 years

”

Europe on the Move proves the widely held view that outdoor advertising can be a welcome form of entertainment for travellers and successful recent campaigns, like Nintendo's (see case study opposite), have employed this principle to good effect.

16%

of respondents said they remembered seeing an ad because it “made me smile”.





case study:

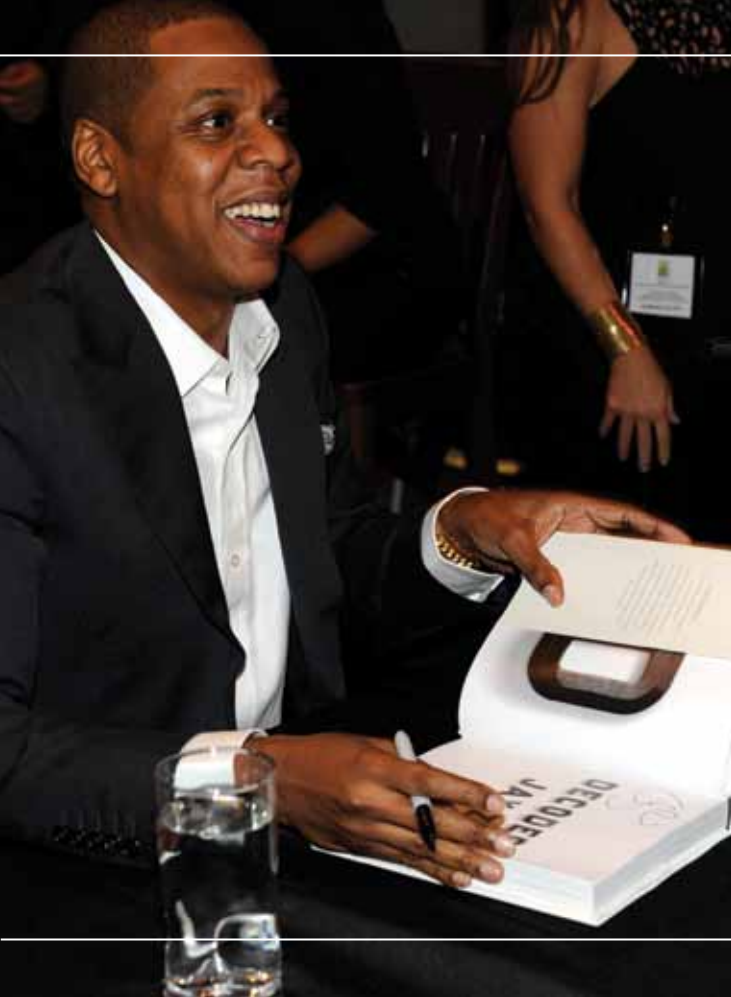
Nintendo DS on the London Underground

London Underground users think that it is a great place to learn about new products, and often find ads keep them entertained on their journeys.

A campaign for Nintendo DSi games saturated the London Underground (Tube) in August – September 2010, appearing on 40,000 Tube Car Panels to raise awareness of a price drop in the product. Pre and post campaign interviews of regular commuters showed that there was significant interest in the outdoor campaign because it “entertained” people while they were on their journey.

82% said that the ads gave them something to read and 69% said they would like to see more entertaining copy in their advertisements. These results reflect the value that advertising provides people at a highly valuable time – the dwell time waiting for their journey to begin and the time they spend commuting.





case study:

Jay-Z: Decoded

CBS Outdoor was a partner for the 2010 global launch of Decoded, rapper Jay-Z's first book and a major cultural event.

The campaign, developed by Anomaly, used outdoor to create a global happening. The pages of Jay-Z's book were scattered throughout the world on billboards and in locations featured in the book. Jay-Z's global army of fans collected the pages by photographing them with their mobile phones and sending them to a dedicated website, where the story came together.

The posters only appeared for a very short period of time, heightening the sense of occasion and generating word-of-mouth, on and offline. The buzz generated helped to turn the launch into a major media event, forming a single integrated campaign, employing outdoor, mobile, digital, social, print and broadcast media channels. Outdoor was also used to make a powerful statement about Jay-Z's status as the world's pre-eminent rap artist.

expert testimonial



Marc Giusti
Chief Digital Officer, Leo Burnett

Outdoor – an experience to be shared

How many posters have ever really had that much to say? More importantly these days: How much does outdoor advertising contribute towards our real lives, journeys, commutes, ideas or ambitions?

If we think of Outdoor not as, say, just posters or poster sites, but as venues, then things change a bit. Being out and about, being

mobile, means we experience and interact with things quickly and immediately. It means that whilst we're going about our business we can enjoy a bit of entertainment. It often means we're susceptible and keen to take a few minutes and read that cross-track or grab an idea there and then and run with it, even snap a picture and share it on the move.

The ideas I'm talking about are the ones that provide audiences with instant, valuable experiences, not just offers or commercial benefits. They're ideas with scale, they're the ones that help change behaviour and provide a lasting memory.

Inventive uses of tech, time and space can bring digital entertainment into the real world, and out of the confines of the web. Making good and memorable use of our handsets and thus distributing brand ideas and their services far and wide. Sharing an experience of one space into hundreds of others.

With our McDonald's Piccadilly Circus sign in London we changed one of London's most iconic ads into an act. We gave people the chance to celebrate their time in London with something they could interact with, share, keep and remember. We gave them something simple, easy and fun... with no tumbling Fries or Fizzy-Pop in sight.

Posted onto thousands of Flickr groups, Facebook pages, emails, MMS's and saved in the photo libraries of millions of people are moments of simple fun in London with McDonald's.

It has become one the brands most important media spaces and is interacted with every day, updated regularly and seasonally and most of all it has reached more people in more relevant and rewarding ways than McDonald's could have ever expected, least of all paid for.

Haven't Posters got a lot to say these days.



Mixed media:

Out of home no-one is a single media user

Fact: Outdoor carries advertising to where people are, and makes ads work harder, smarter, and longer.

'Integrated out-of-home'

Outdoor has always worked well as part of an integrated, multi-channel campaign – extending reach and creating conversations by taking brands into the public realm. But the personal digital revolution means that outdoor is now a critical part of a multi-channel mix, out of the home. 'Indoor' advertising has come outside.

- 11% of travellers reported using both a mobile phone and a laptop regularly while travelling...
- ...and, 52% of travellers said they regularly use the phone, read something and listen to music while travelling.

Campaigns experimenting with location-based marketing, mass participation events, word-of-mouth campaigns reliant on iconic imagery, clues and visual cues are driving a new wave of innovation in outdoor. A recent example of this is the launch of Jay-Z's new book, which turned poster sites across the world into a page-by-page preview collected by fans on their mobile phones (see case study opposite).

Perhaps most importantly, outdoor can deliver an immediate call to action, driving people to websites or online stores, to engage with brands and make purchases.

“

I have nothing to do, I'm waiting at the bus station and I glance around and read whatever catches my eye... I may pick up on something good! I get bored and I need to see something that distracts me.

Raphael, Spain, 22 years

”



But not all influencing is new wave

There is a common misconception that outdoor advertising means having split seconds to attract, intrigue, and engage people – and so copy has shrunk, and visuals dominate. But, creative agencies and brands are increasingly taking advantage of “dwell time” - time spent waiting for transport - to engage their audiences. Dwell time means that you have minutes, not seconds to catch people's eye.

And, as our research shows, most public transport users report to be “bored,” meaning they are happy for a long-copy distraction to occupy them while they wait for the next train or bus. Research has also shown that long dwell environments generate 4x greater message take-out, which, in turn, is proven to improve brand preference and choice. (Total Recall Research, TNS, 2008).

Section Three

Influencing On the Move

Activating the outdoor
audience



No matter what our mission might be outdoor advertising delivers! The work commute and the school run present opportunities to make quality connections. Whether we are on our way to do some shopping or meet up with friends, outdoor advertising reaches us when we are about to make decisions – what to buy, what to say, what to do, what to eat, what to drink and what to think. Outdoor reaches us when it matters most – on the path to purchase. It is effectively the last mile in advertising.

In this final section we explore how likely people are to act on advertising when they are on the move. Insights in this area are particularly rich as not only do our respondents demonstrate more heightened and intense emotions when out-of-home (an important indication of how people 'react' to outdoor ads) they are also using technology to equip them to make buying decisions.

With outdoor advertising, there is a growing opportunity to leverage this new "mobile power" to reach people when they are at one of their most active times of the day. In our study we heard from thousands of Europeans who reported that advertising inspired them to "do something." In fact, one-third of people said they bought a product or service after seeing an outdoor ad. And, we also found that outdoor was regularly effective in driving people towards a product/service – with nearly half of respondents saying they looked for more information following seeing an outdoor ad.

The oldest media on the block is helping to drive people onto the newest medium in town.

Outdoor leads to action

Technology means people are, more and more, experiencing 'indoors outside'. For advertisers this is a consumer event-horizon and an opportunity.

How do you draw on the distinctions between experiences, thoughts and behaviours that were once profoundly and inevitably interior which are now lived in the open air, such as Facebook?

With outdoor advertising, there is a growing opportunity to leverage this new "mobile power" to reach people when they are most active during the day. In our study we heard from thousands of Europeans who reported that advertising inspired them to "do something" ...

- Whether it's researching, referring a friend, or purchasing, 2/3 of people have done *something* as a result of seeing an outdoor advertisement.
- 33% of Europeans said they bought a product after seeing an outdoor advertisement.
- 59% said they "thought about" the brand or considered buying it after seeing an outdoor advertisement.



An unintended consequence of "Europe on the Move" was the clear illustration it gave us of the natural relationship between outdoor advertising and mobile technology. People enjoyed taking photos of ads they'd seen, and were happy to respond to us via SMS about how they were feeling on their journeys. The digital gallery we were able to build is testament to the high level of engagement from the outdoor audience.

Hundreds of photos of outdoor advertisements were submitted by respondents via mobile phones during the survey; over 3,000 survey responses were submitted via mobile web access.

The OOH Heightened Emotion Effect

As part of our survey, we asked respondents to record how they were feeling when they travelled. The responses were recorded during the day via an internet portal. And, responses were also recorded during travel through a mobile response system.

As we had hypothesised, the results were that people tended to have a heightened or more intense feeling when they responded in situ, rather than a few hours later. Indeed, whilst the mobile results confirmed the results of the internet study, it also isolated at least one emotion that differed in terms of its intensity (respondents were asked to pick three emotions they felt during a specific journey). For example, when people reflected on a shopping trip they reported feeling calm but when asked in situ they stated clam and energetic with the latter as the more intense feeling.



Journey/Mode	Web Response	Mobile Response
Shopping	Calm	Energetic
Grocery shopping	Bored	Energetic
Bus	Curious	Angry
Sport/Fitness	Energetic	Angry

“Often, when I look at a food ad, like for cheese, ice cream, a pudding, etc, all of a sudden I have a very strong craving to eat some.

”

Chloe, France, 31 years

So what? This heightened emotional effect means that outdoor reaches audiences at a time when they are feeling alert, animated and crucially – as we have shown in the Mode and Mood section on page 14 – more likely to respond positively to messages. Outdoor provides the ultimate lean-forward audience.

We are living in an era where “dead time” is dying

There are fewer and fewer places and times in our daily lives where we are not touched by technology – and the result is we are able to do more, in more places. When combined with our proclivity to

show heightened awareness and emotions while outdoors, technology is increasingly equipping us to make decisions on the go. We are already in an era where smartphones and digital mobile devices are the mainstream – for outdoor this is a growing opportunity to leverage peoples’ new mobile power to reach them when they are at their most active and alert during the day.

Connected Consumers

When coupled with our access to technology, our heightened emotions are more likely to lead audiences to act on outdoor advertising.

Technology is turning outdoor spaces into places where we can actively research, relate, share and purchase products and services. And, smartphones and mobile internet use means that we have the power to act on what we see. Bus stops, train stations, and roadside drives are all becoming points of sale – all the more reason to ensure you are connected with this powerful audience.

Sociable consumers

Social media has revolutionized the way that brands connect with people. And now, with the rise of smartphone technology and mobile applications, social media is mobile media. Our findings show that people are on social media networks at home nearly as often as when they're out.

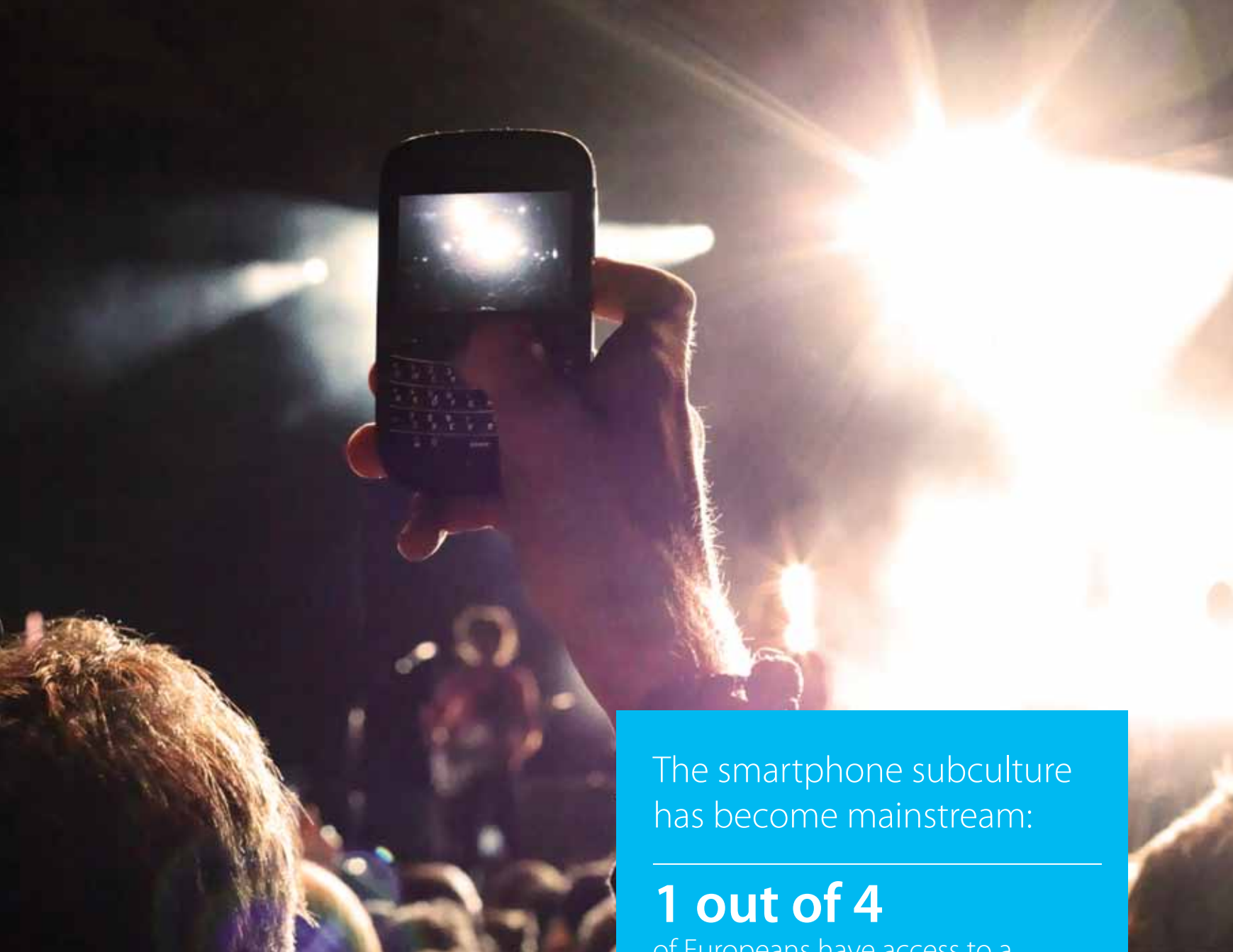
In fact, more people are on Twitter when they are on-the-move than when they are at home. As more people receive their news, share opinions, and share locations through social media, brands increasingly need to consider how social media and outdoor advertising can be integrated to engage consumers in a more direct way. Outdoor's value effectively increases as social media becomes a distribution channel for outdoor. Friends share special offer deals on Twitter, post funny ads they saw on the train or read reviews on new technology products– all of these activities mean that outdoor will continue to go further.

As mobile devices get smarter, location-based functionality on platforms like Facebook, Twitter and Foursquare is growing in popularity and importance to advertisers. Brands now have an opportunity to bring people together in new ways, empower communities and create an enhanced sense of local identity.

The qualitative data collected by Europe on the Move suggests that the most effective Outdoor campaigns are location-specific. Mobile social media, falling print production costs and digital outdoor inventories now mean that integrated outdoor campaigns can now be hyperlocal – speaking to audiences about their streets, high streets or postcodes.

The implications for advertisers like utility companies, telecoms providers and high-street retailers are obvious, but any brand that wants to maximise cut-through should consider how integrated outdoor can enhance brand loyalty by talking to audiences about the places where they live, work or play.

Social Media	At Home	On- the- Move
Facebook	56%	54%
Twitter	5%	11%
Linked In	3%	3%



The smartphone subculture has become mainstream:

1 out of 4

of Europeans have access to a smartphone when they are on the move.

1 out of 3

Europeans regularly access the internet from their mobile phones.

57%

of those people who said they thought about TV after seeing an outdoor ad for a programme, shared it with their friends, or read reviews of the programme – instantly.

“

It grabbed me because it is an ad whose location is suitable and I feel that seldom happens. In this case it was an ad by Orange which talks about 3G coverage in Madrid and the image depicts the Metropoli building and the beginning of Gran Vía. That is what caught my eye.

”

Maria, Spain, 23 years



expert testimonial



Oded Ran
Head of Consumer Marketing, Windows Phone UK, Microsoft

Dead time is dying – now we live life on the move

2010 has seen a tremendous growth and acceleration in the smartphone market and mobile has become an important vehicle for advertisers to reach their audience. Mobile offers access to a diverse, large, and growing audience of affluent consumers and business people.

A core fundamental of this experience is the notion of being connected at all times to friends and colleagues. Our lives operate across a range of operating systems and communication methods, and it's crucial a user's selection of a smartphone reflects this need. As an example, we think we're uniquely positioned to draw upon some of the best products and services in the industry, then weave them into the core of a phone's architecture; things like Bing for Search, Xbox LIVE for games, Zune for Music, Office for Productivity, Internet

Explorer for Web and Windows Live for sharing and communicating.

Another key extension of the mobile experience has been the integration of social media into smartphones in a smart and sophisticated fashion. As an example of this, Windows Phone 7 integrates users' contacts with their Facebook friends, gathering all their contact information in a simple and easy to access location.

This increased trend for accessing information on the go, rather than a PC or laptop, provides advertisers with increasingly sophisticated location-based opportunities. A company's search marketing will need evolve to take advantage of the new location-based relevancy and the associated new consumer behaviours. This year, it

will become increasingly important for advertisers and marketers to bear in mind that consumers will be accessing search engines via their phones, verbalising very different intents, using different keywords and expecting different results from what they get on their PC.

This offers huge opportunities for location-based marketing initiatives and thus unlocks new marketing channels for companies which are not online today. Picture the opportunities this provides for local retail outlets and their quest to compete against the larger, dominant stores. Mobile is one of the fastest-growing technology markets. With consumers increasingly organising their lives via a smartphone, and businesses providing tools to aid this behaviour, we're set to lead a fascinating year of innovation.

Huge opportunity for outdoor retail

23% of people said they bought a product after seeing it advertised outdoors, and 19% said they went online to buy the product/service after seeing it advertised outdoors.

Tech-savvy travellers told us that integrated barcode technology would help them get more from outdoor advertisements, such as getting instant access to deals, product information and special offers. As barcode scanning technology becomes more integrated with outdoor advertising, we expect outdoor to become even closer to the point-of-sale and to have more of an influence on how we make our purchasing decisions.



“

The possibilities are huge: smartphones can interact with all sorts of media, using their cameras to take pictures of coupons or barcodes, or web browsers and apps for virtual offers and information. Public transport is perfect for providing information and offers. While sitting on the bus with my iPhone, there's no reason why an ad shouldn't be able to direct me to a website or allow me download an app with news, weather, showtimes, shopping offers, games, etc.

James, ROI, 32 years

”

Conclusion

Outdoor advertising is not only the last true broadcast medium, it is also intensely personal. Get it right and it can make people laugh, keep them occupied or help them out on a journey at a time when they are most aware of the world around them.

In a world where niche media consumption is both a cliché and a Sacred Cow, advertisers need to be alert to the possibilities that the outdoor medium can provide. Our journeys represent a “space” like no other in our lives. Many of us are actively looking for new emotional or mental experiences and this must surely give marketing communicators pause for thought. Here we see proof of an audience prepared to seek out inspiration, ideas and new experiences.

The outdoor demographic is easily misunderstood although in reality, it's quite simple. Outdoor reaches the kind of people advertisers want to reach – they are active, technologically savvy, bigger spenders, and generally more engaged in the world around them. It's also an audience that is highly receptive and responsive to messages.





What next?

Outdoor is as relevant today as it has ever been. The way people relate to outdoor will continue to evolve – whether due to advancements in mobile technology or changes to how we travel.

This report is the first in an annual series of “Europe on the Move” studies which will follow developments and gather data on outdoor audiences. Ultimately, the purpose of this insight is to ensure that outdoor continues to support advertising objectives and deliver successful campaigns.

“

...Outdoor reaches the kind of people advertisers want to reach...

”



Contacts

The insights contained in this report provide just a snapshot of the information we have gathered into the outdoor audience, their moods and behaviours.

We have collected and analysed a significant amount of data – at both a pan European and individual country level – and would be happy to share these findings with you in more detail.

Please contact the relevant person who will be happy to discuss the insights in more detail.

Alternatively, visit www.europeonthemove.com to download a copy of this report and access more content on the study.

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“

You've already heard it on the radio or TV, then you see it and notice it when you're out and about, eventually when you're making a purchase, it's always the first to come to mind.

”

Adriano, Italy, 49 years

Appendix



About CBS Outdoor

CBS Outdoor is a leading global outdoor advertising company. We operate in four continents with approximately 3,000 employees worldwide. With some of the best advertising assets in the world, our clients, mainly blue-chip advertisers, choose us to help them market their brands, products and services on a daily and even hourly basis, to audiences on the move.

Our core business is in transport and billboard advertising but in many of our markets we deliver street furniture advertising solutions and offer significant retail environment advertising experiences too. CBS Outdoor is also a leading digital out-of-home advertising provider. We are the creative minds behind groundbreaking digital advertising initiatives at, for instance, the London Underground and the Westfield London shopping complex.

We are part of CBS Corporation, one of the largest mass media organisations in the world, which operates across TV and radio, billboards and publishing, as well as in newer technology mediums.

Methodology



CBS Outdoor commissioned Harris Interactive, a full service market research agency, to conduct the Europe on the Move study.

The scope of the study covered six key CBS Outdoor (CBSO) markets – UK, Ireland, France, Spain, Italy and the Netherlands. The fieldwork period was mid-September to mid-October 2010.

The study was conducted in two main stages:

Stage one

A quantitative online survey amongst 9,665 consumers “on the move” across the 6 countries. To qualify as an “on the move” consumer, individuals were screened to ensure they had left their house within the past week on some sort of mission or journey. The questionnaire was wide-ranging and detailed, covering out of home behaviour and attitudes across a range of missions and via a series of transport modes.

Stage two

Qualitative Bulletin Boards in each of the six countries designed to add colour and depth to the quantitative findings and bring the insights to life. Respondents were recruited from the online survey, with 20 people contributing to each country’s Board over a period of five days.

A bulletin board is an online qualitative platform and respondents were asked to log in to the Board at their convenience at least once per day for a period of 30 minutes. The methodology was semi-structured where questions were pre-programmed from a topic guide which started quite generically before becoming more specific to the main topic areas as the Board progressed.

Respondents were encouraged to answer all the questions posed and also to comment on others responses or prompts from the moderator. They were also encouraged to upload pictures or photos to the Board of themselves and different forms of outdoor advertising they had noticed while out of home.

In order to engage respondents to be as active as possible and to generate the most useful insights, they were also asked to complete a pre-task diary of their out of home journeys over the week leading up to the boards being live.

A third element

A third element of the study, a WAP based survey via mobile phone, ran concurrently with stages 1 and 2 and asked consumers how they were feeling when actually travelling or having just completed a journey. In all, Harris Interactive captured 3,002 different responses.

The purpose of this part of the project was to validate the online findings, by answering a key question: do people, sitting comfortably in their homes and filling in an online survey, remember and report their feelings in the same way as they experience them when they are actually on the move.





The real voyage of discovery consists
not in seeking new landscapes but in
having new eyes.



Marcel Proust
French novelist
(1871 – 1922)

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