

Evolving GB OOH audience measurement through advanced technology and data modelling

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Meet the speakers



Denise Turner

Chief Executive
Route Research



Mark Flood

Global Head of OOH
Ipsos

Our presentation today.

1.

Better representation of audiences over time



2.

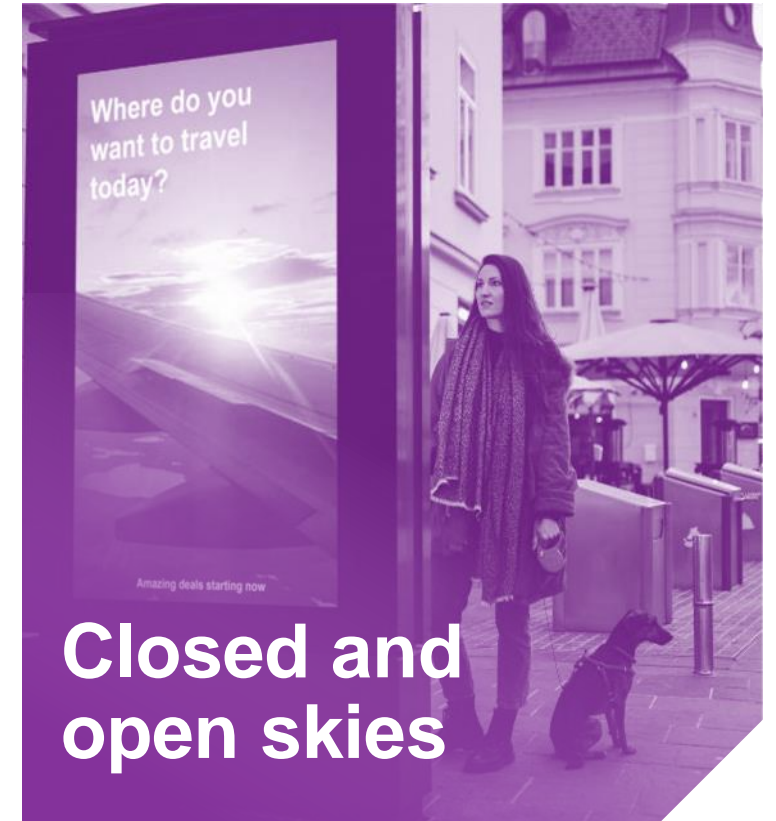
Better representation of pedestrian behaviour



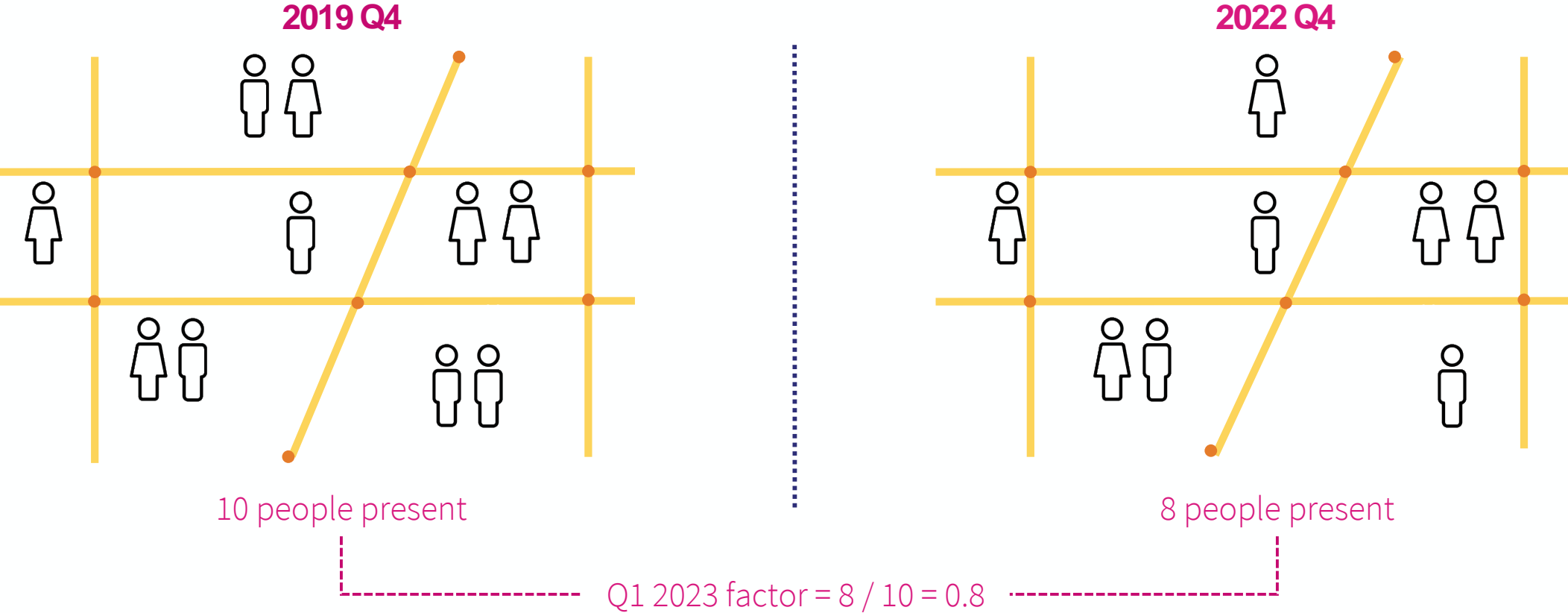
BETTER REPRESENTATION OF AUDIENCES OVER TIME



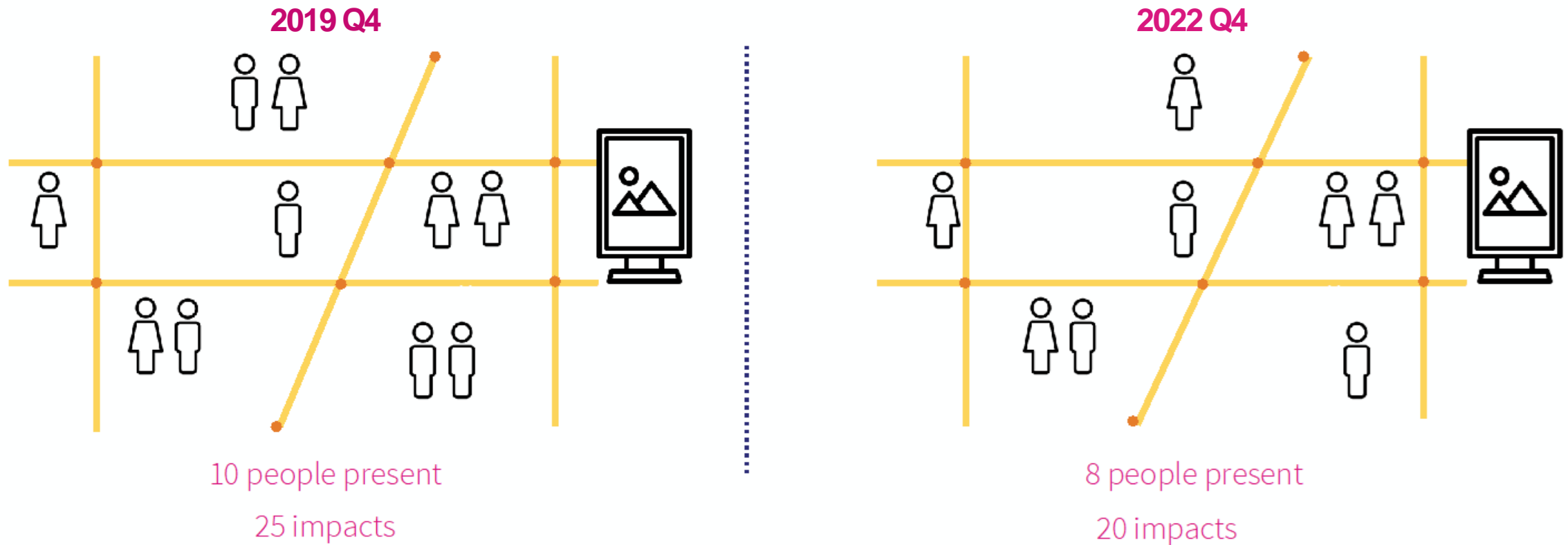
What did we need to know



How the volume calibration works



How this is applied to audience data in principle



Contemporary audience: original impacts * contemporisation factor
25 impacts * 0.8 = 20 impacts

What Route Learned

After Extensive testing...

Neither Telco nor SDK were deemed robust or stable enough to underpin the audience currency

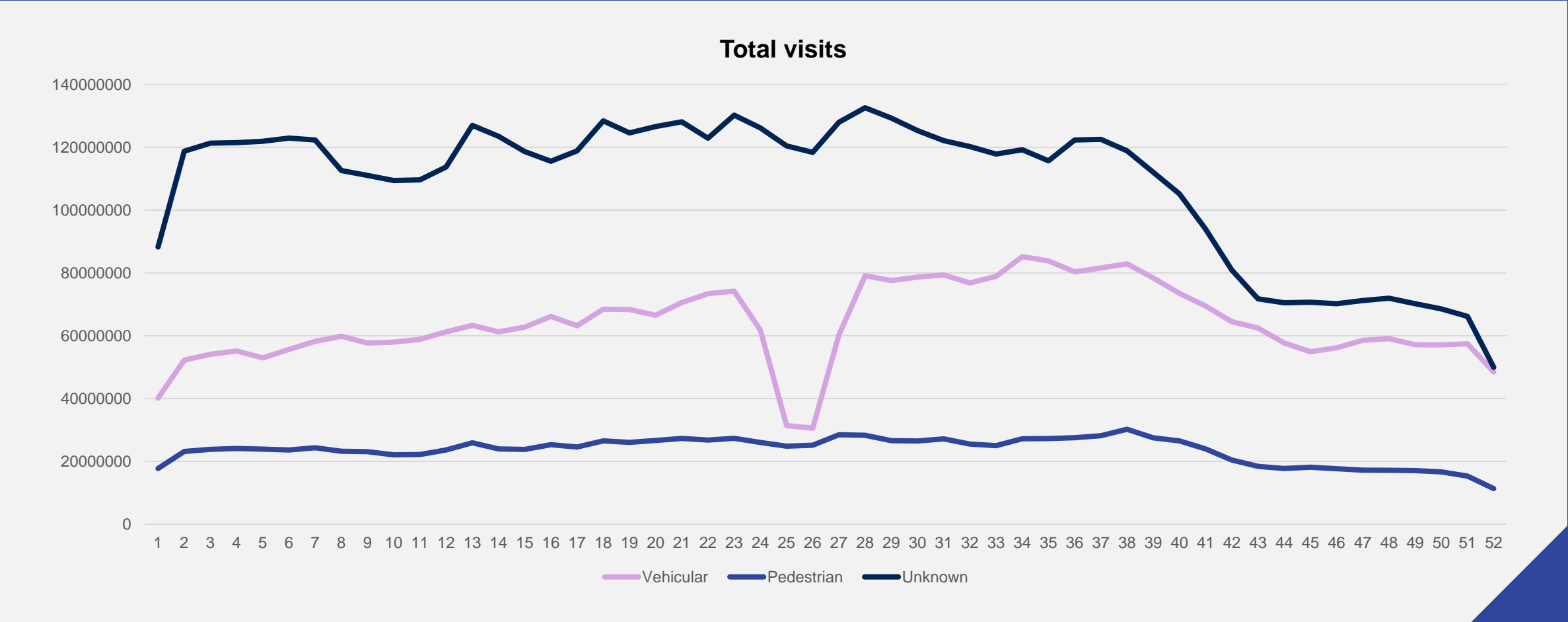


What the data told us



Demonstrating the challenges with SDK

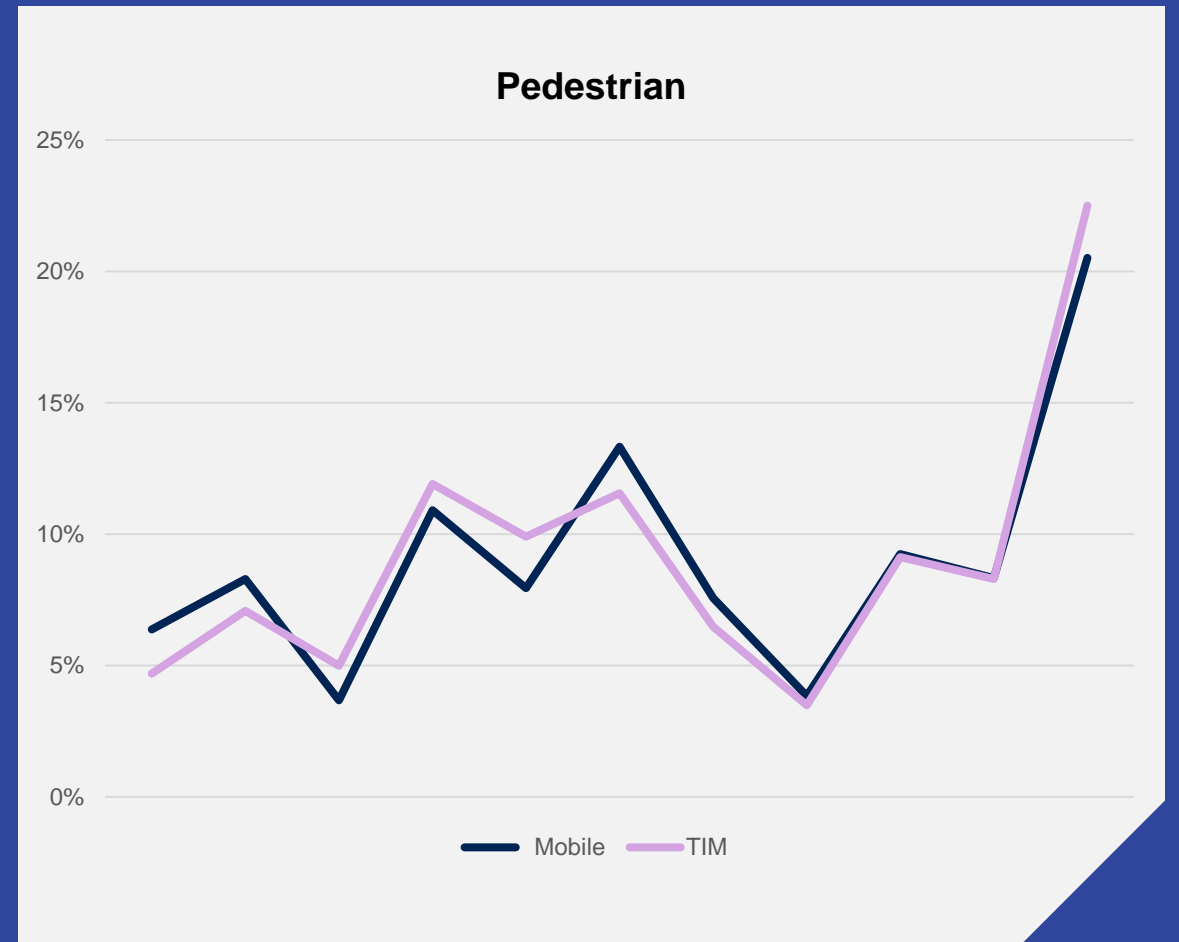
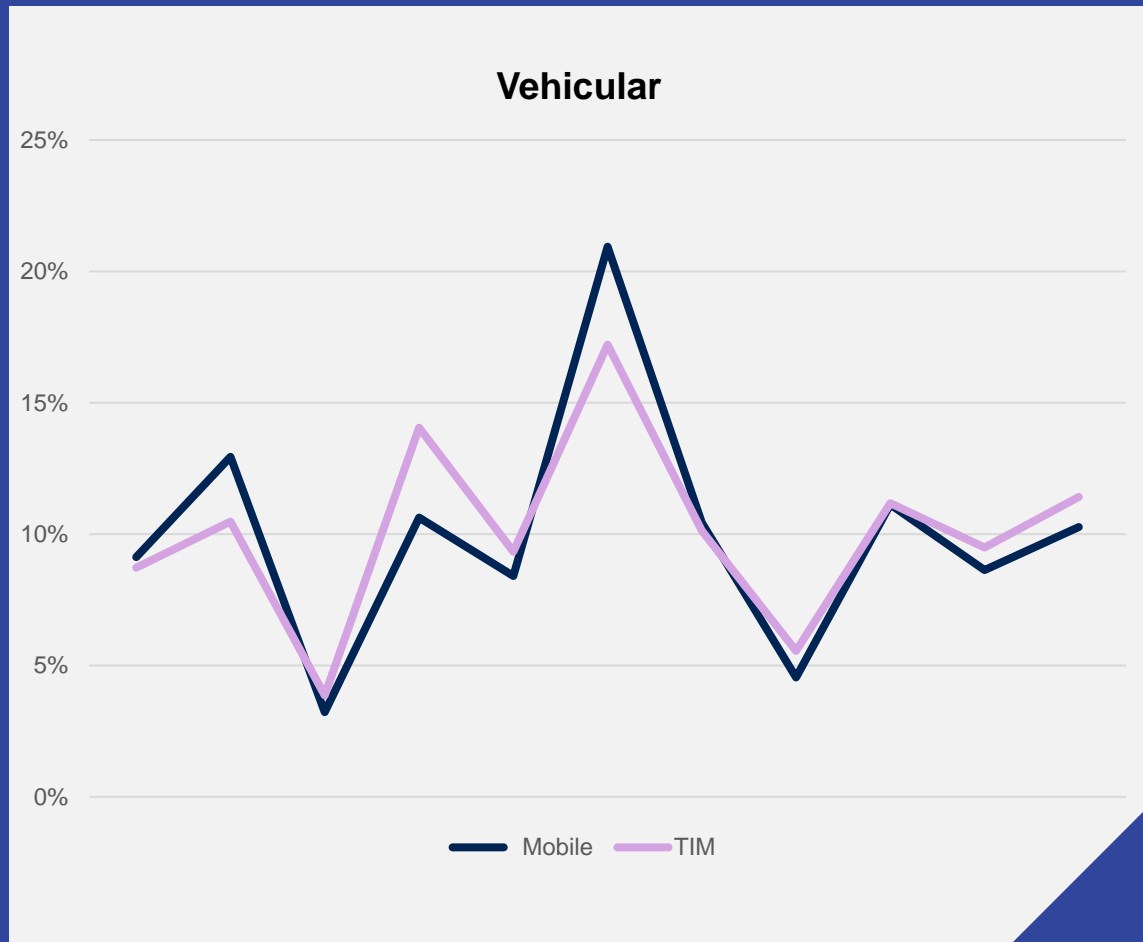
SDK operating system update impact and temporary removal of SDK by a navigation app



Source: third party national SDK data

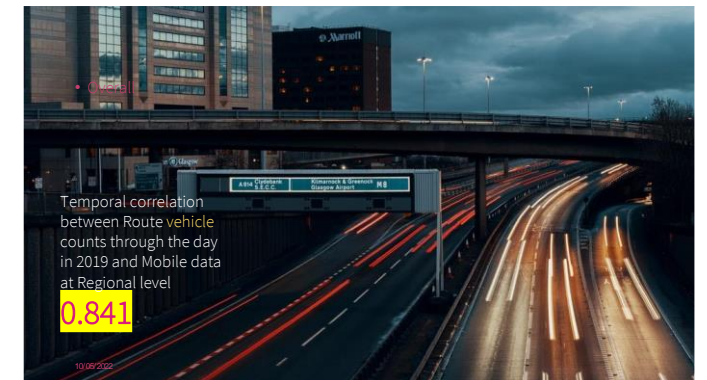


On paper Telco data has a strong correlation

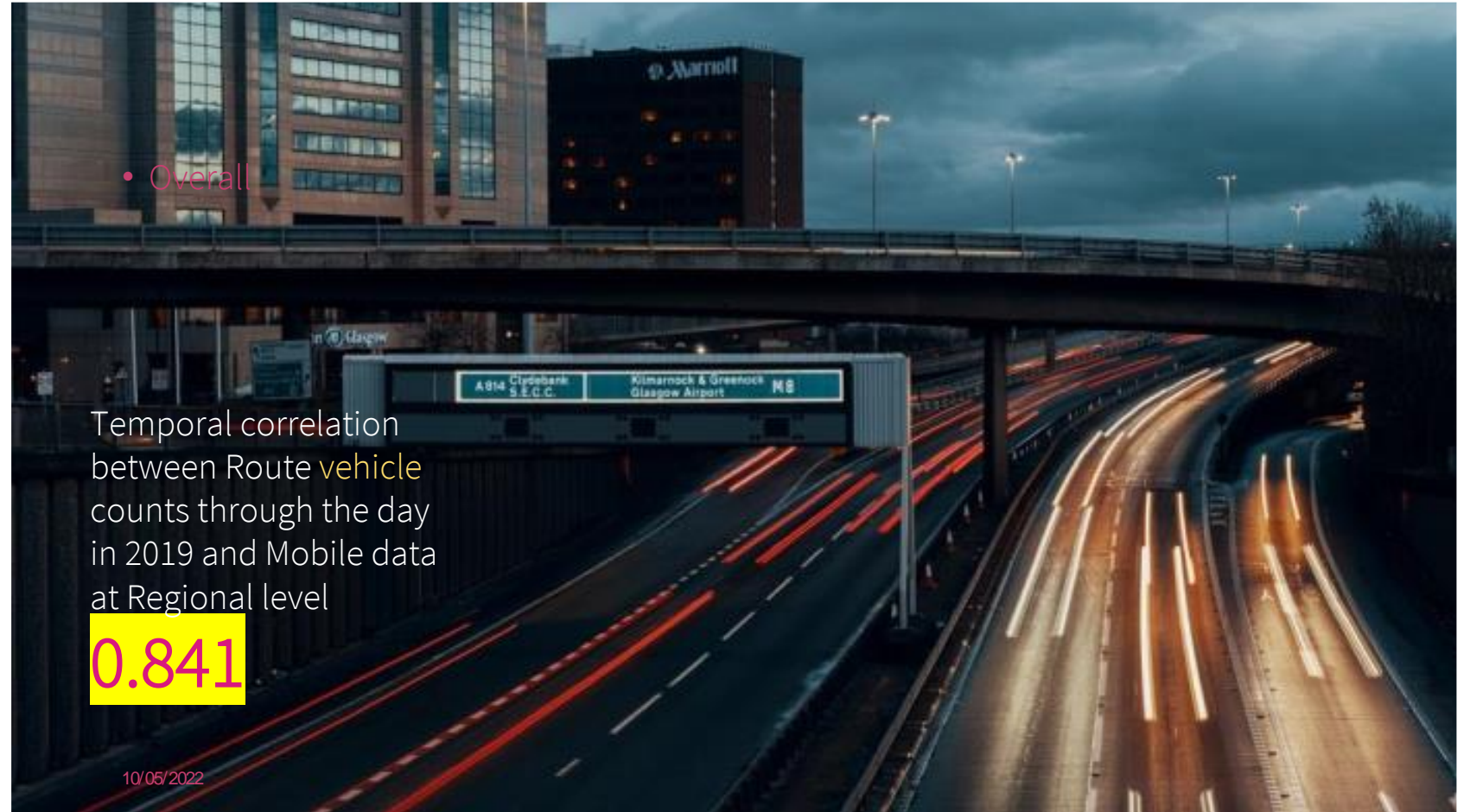


Source: third party national telco data

Macro level analysis

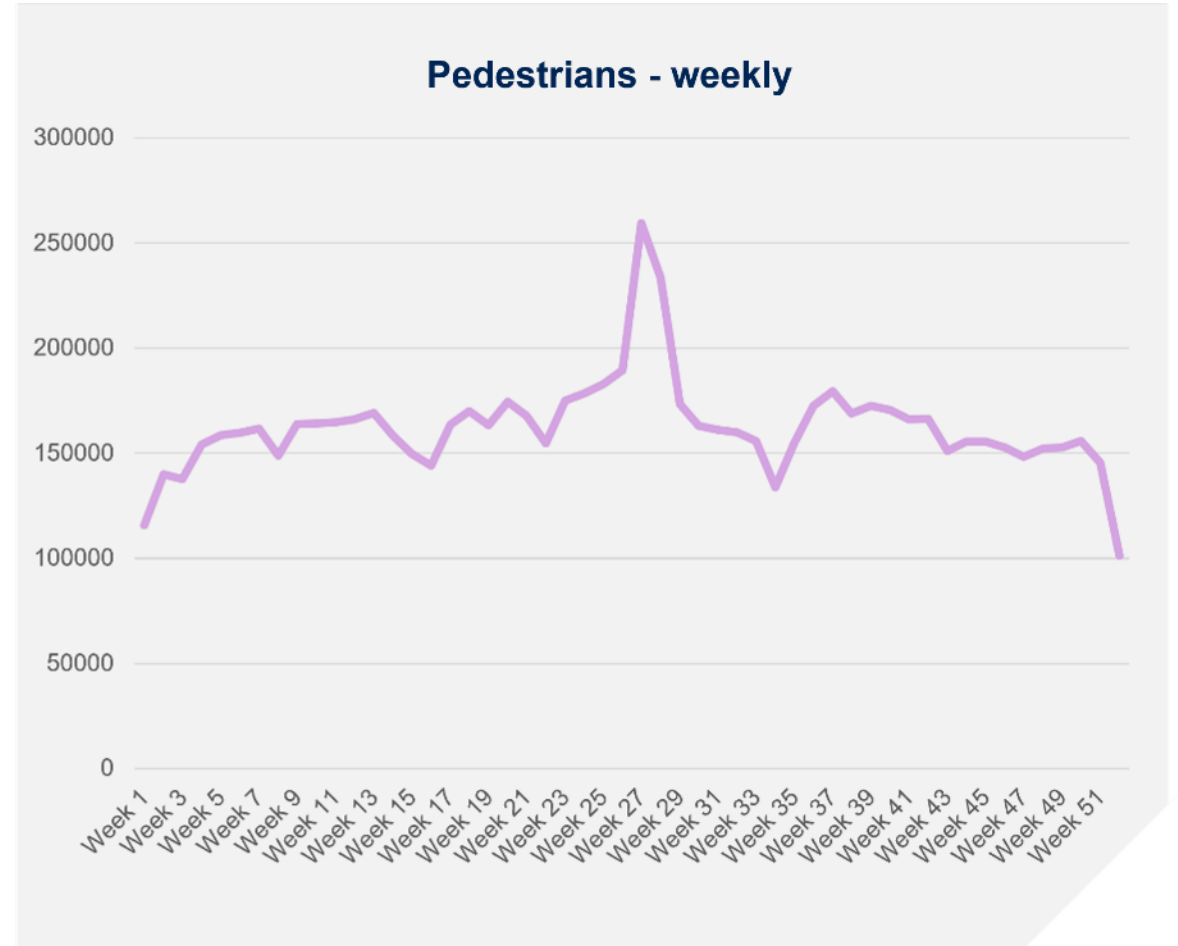
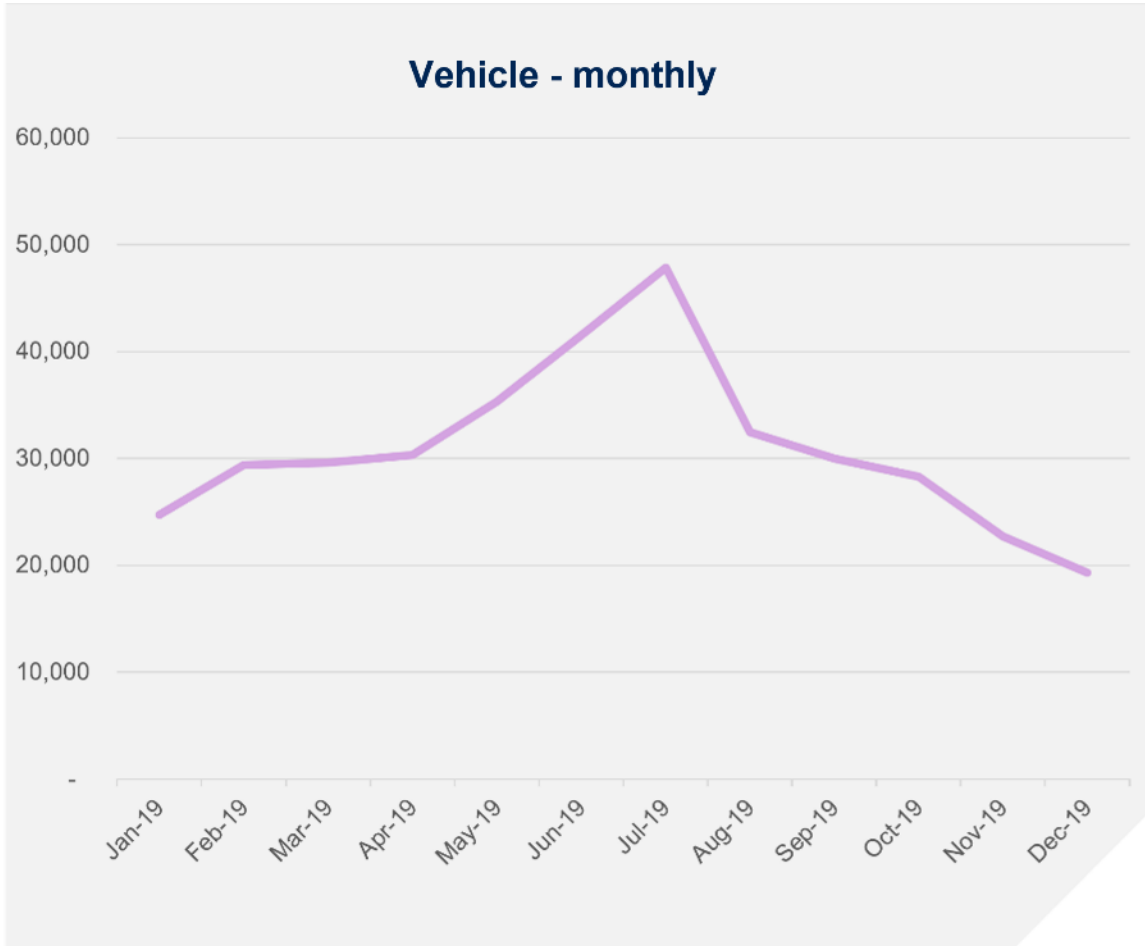


Macro level analysis



Micro level analysis

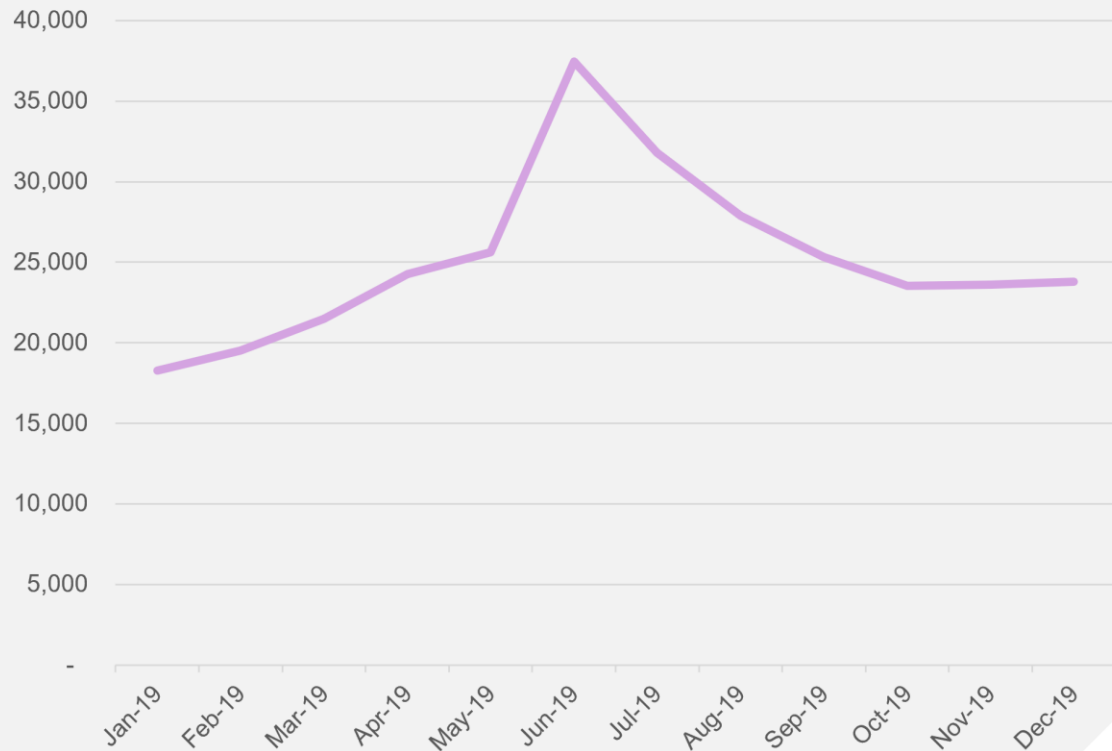
Wimbledon



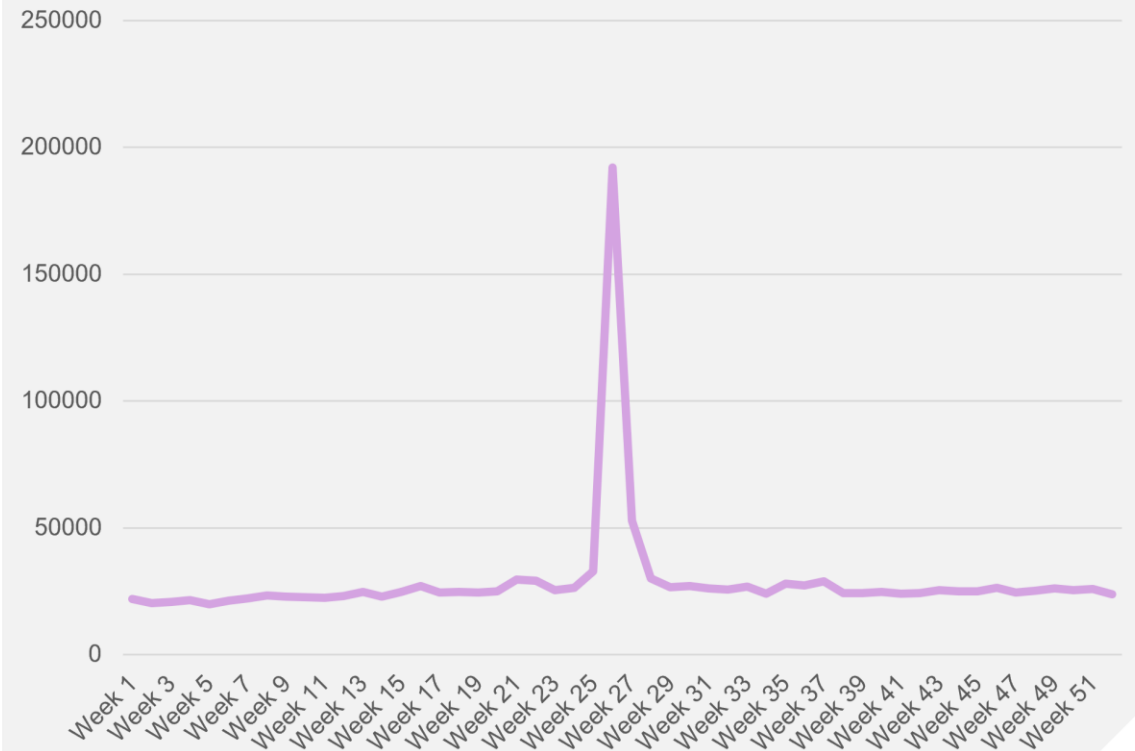
Micro level analysis

Glastonbury

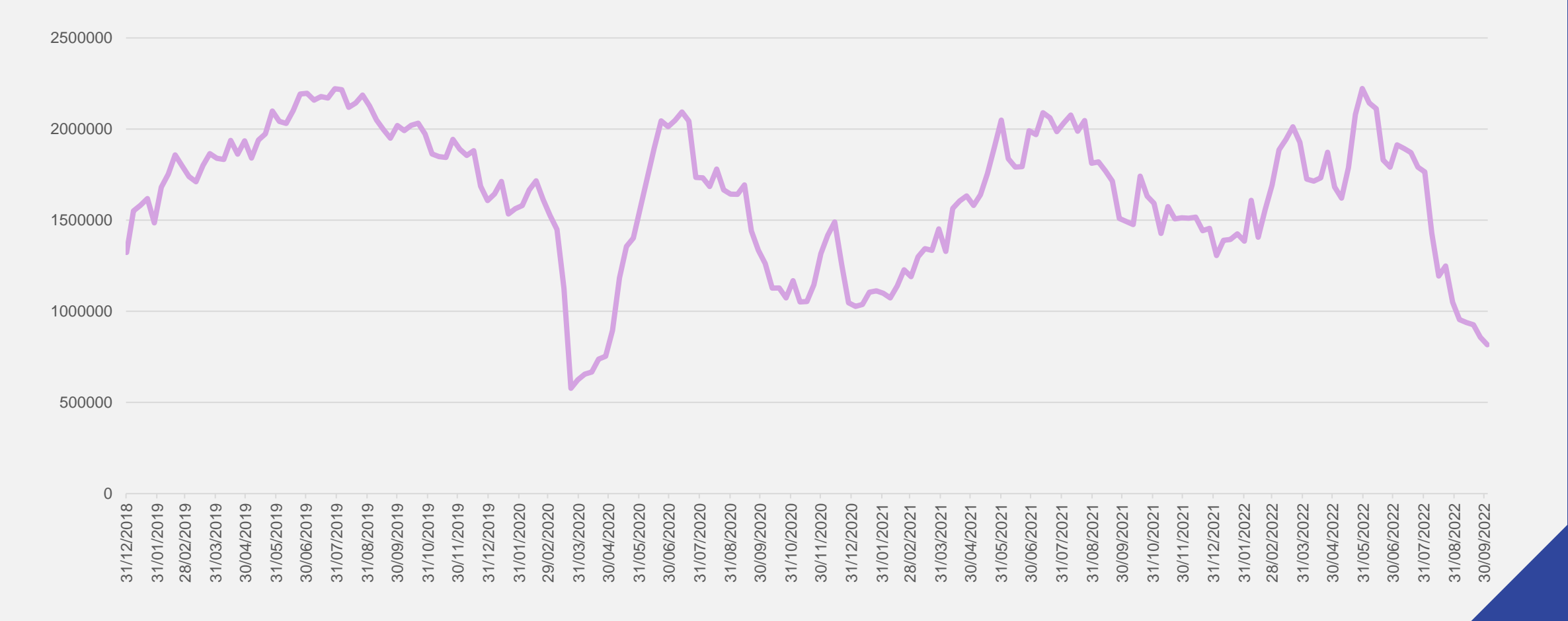
Vehicle - monthly



Pedestrians - weekly



But longitudinal analysis highlighted weaknesses



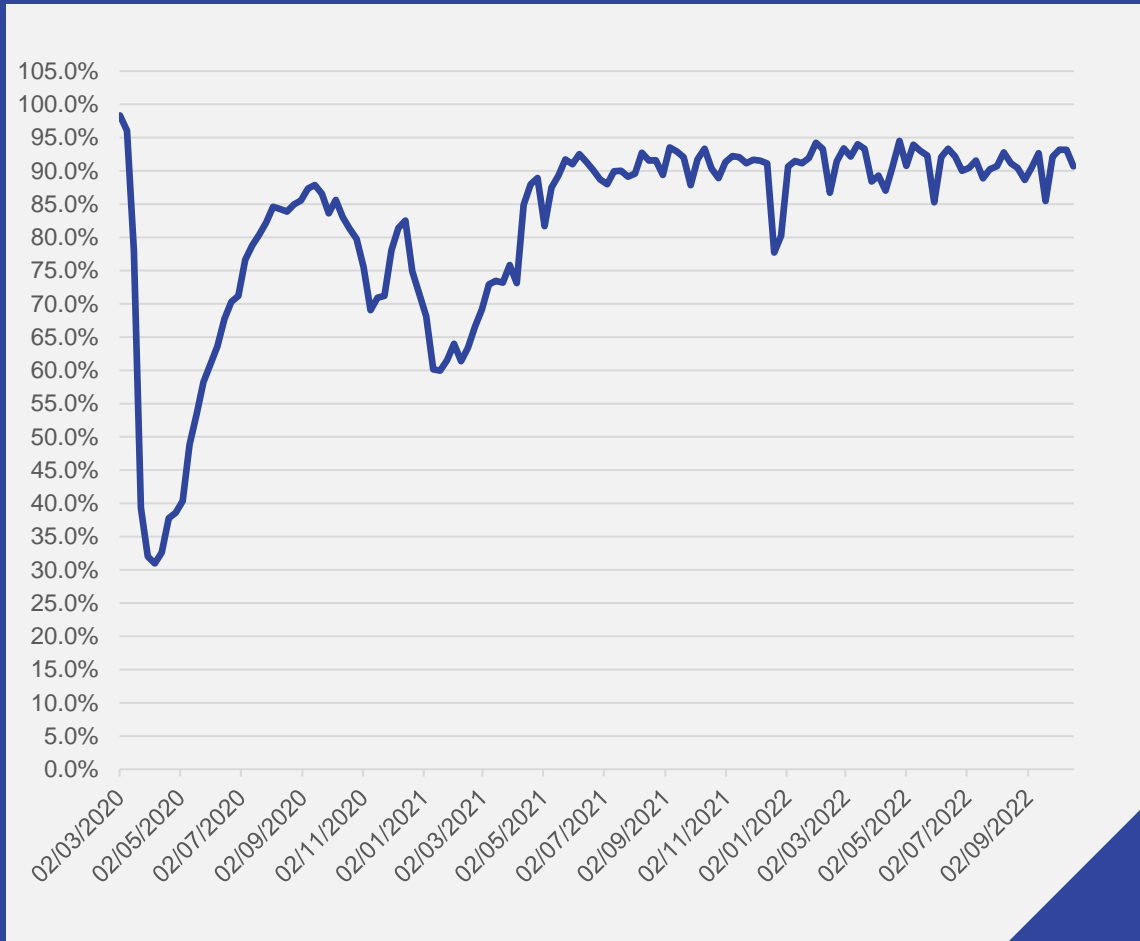
Source: third party national SDK data



We used multiple data sources to reflect current reality

ENVIRONMENT	DATA SOURCE	GRANULARITY OF FACTORS
Roadside / Taxi / Bus - Vehicles	DfT ATC	National
Roadside / Taxi / Bus - Pedestrians	Springboard (High street factors)	Regional
Shopping Centre Interior	Springboard (Shopping centre factors)	Regional
Rail	JCDecaux (Network Rail)	Station
Rail Carriage Interior	JCDecaux (Network Rail)	TOC
Underground	Global (TfL / SPT)	Station
Tube / Tram Carriage Interior	Global (TfL)	Line
Airport Interior / Exterior	CAA	Airport
Motorway Service Station	iMedia	Station
Shopping Centre Exterior	Springboard (High street factors)	Regional
Supermarket Exterior	Springboard (High street factors)	Regional

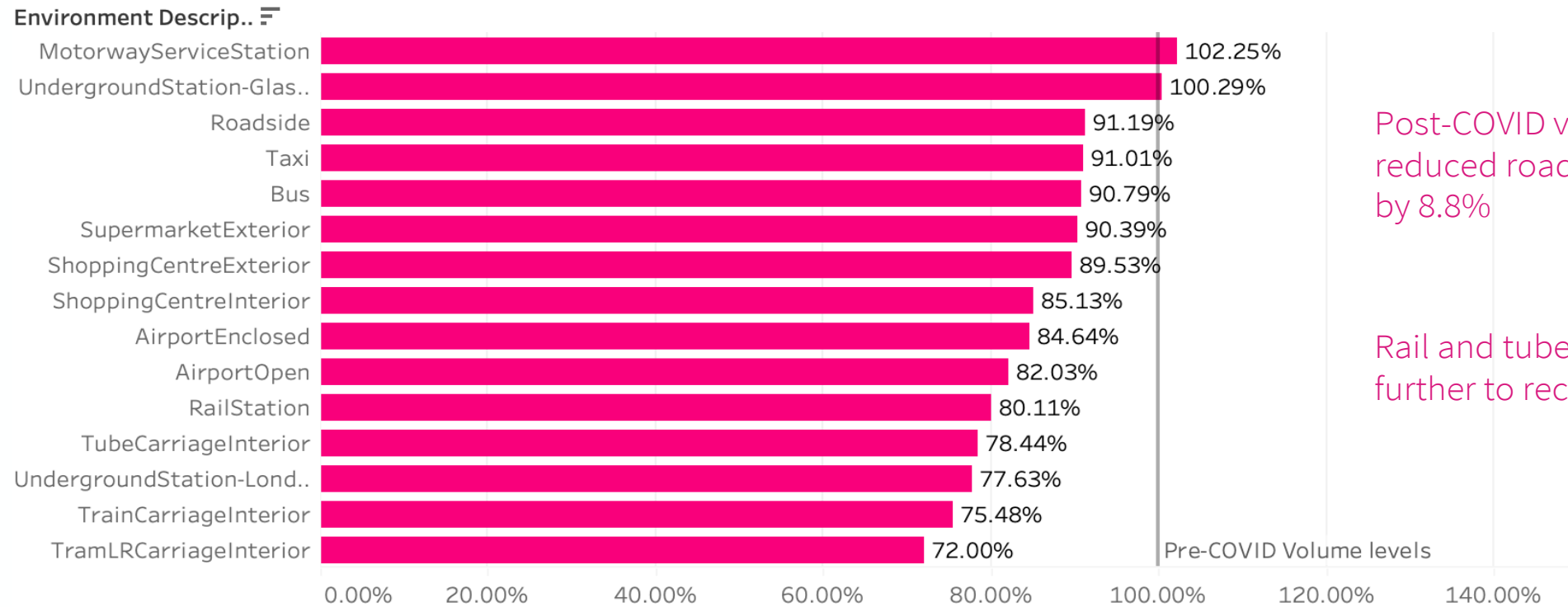
Longitudinal analysis proved to be stable



Source: third party car count data

And the results by environment

Audience Volumes vs Pre-COVID levels



Post-COVID volumes have reduced roadside impacts by 8.8%

Rail and tube still have further to recover

Source: Route Research Q4 2022
Base: All GB adults 15+; All Frames

What this means in practice



Audiences better reflect current volumes



Natural variances across region and environment



Transport inventory making significant recovery



Factors are being refreshed quarterly as travel patterns change

What this means in practice



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BETTER REPRESENTATION OF PEDESTRIAN BEHAVIOUR

**Leveraging technology to deliver
better indoor audience measurement**

MST data gathered recruiting people

1.



Malls

11,000

2.



Airports

1,200

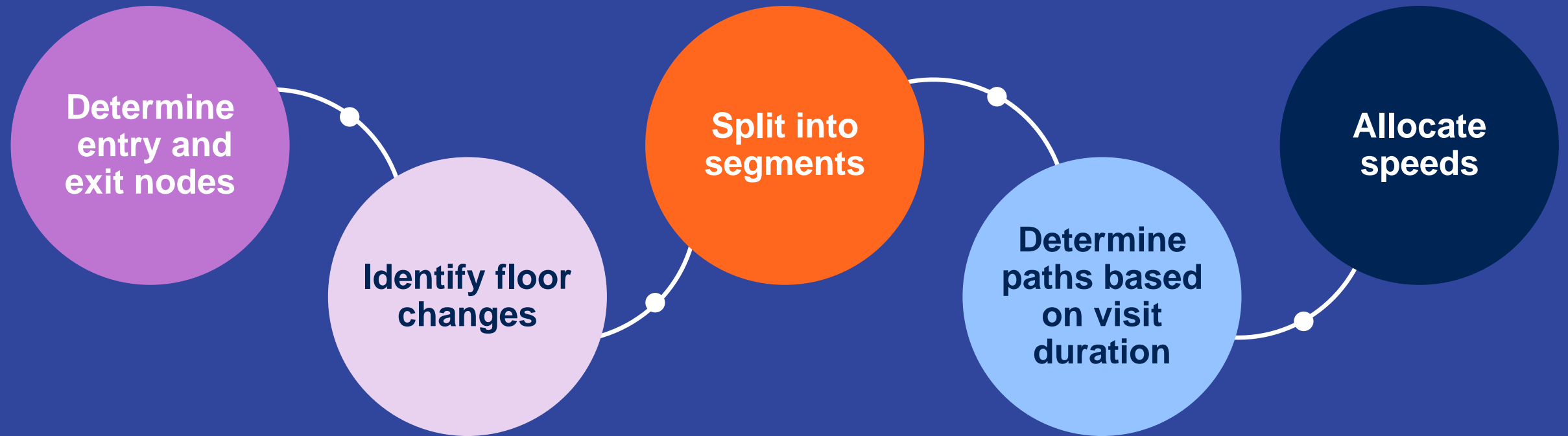
3.



Rail and tube

90,000

Interpretation of MST in ROUTE





Application of MST in ROUTE

A better understanding of...

1.



Speed

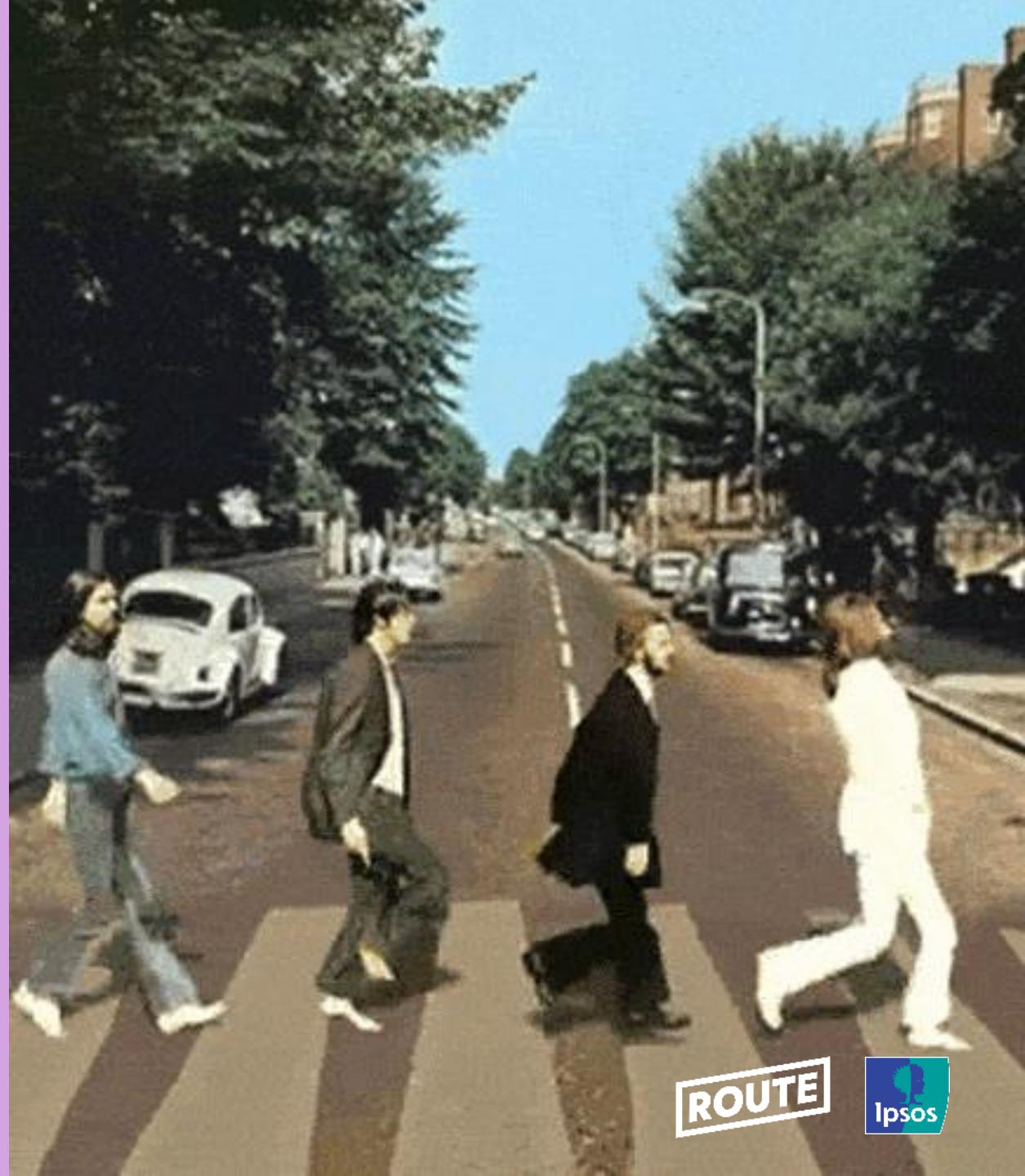
2.



Routes

We can now account for people moving at variable speed

- Until now our model assumed all **pedestrians were constantly moving**
- This has been replaced by **observed speeds**
- The reduction in speed **means increased time in visibility areas and a greater likelihood of seeing ads**
- This is of **particular note for digital screens** as people can be exposed to more ads



Waiting

Speed <0.2 mph
for at least two
consecutive
seconds

**25% of roadside
contact time**

Wending

Speed ≥ 0.2 mph
and <1.85 mph

**15% of roadside
contact time**

Walking

Speed ≥ 1.85 mph

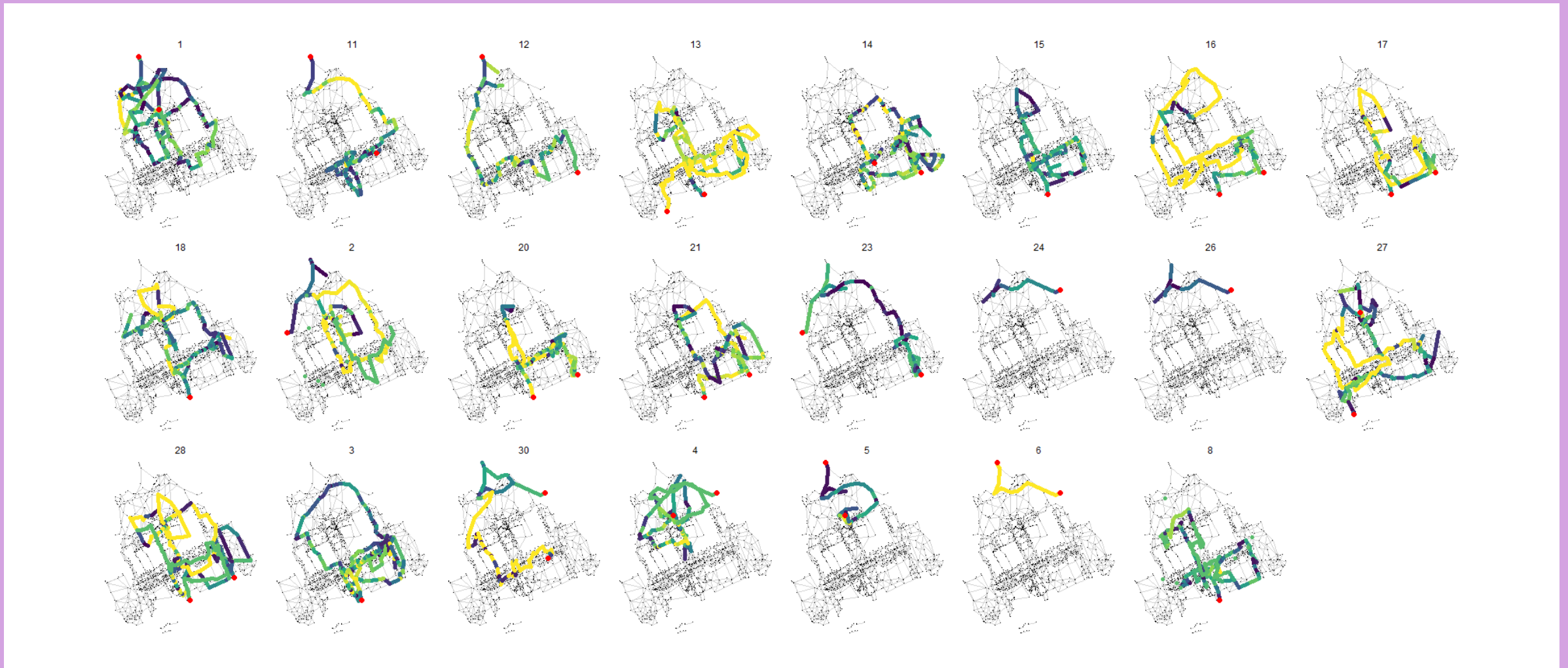
**60% of roadside
contact time**

**This has a significant
effect** on pedestrian
audiences

**People moving slower
spend longer in visibility
areas** leading to improved
visibility levels and so higher
audiences

For digital inventory,
it also increases the potential
of multiple impacts from the
same exposure

Improved behavioural data now shows individual journeys through indoor environments and differentiates the speed of travel, replacing previous assumptions



Summary slide

1.

Determine the best local data sources



2.

Implement based on their accuracy to represent people



3.

Not one size fits all



4.

Continually evolving to deliver better strategy and planning data



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THANK YOU

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