

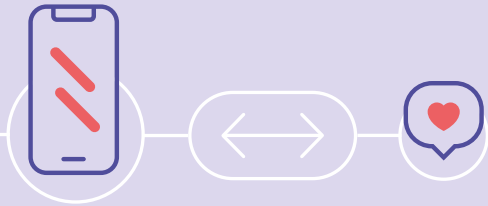
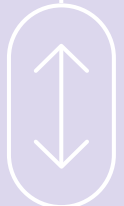


global

JCDecaux

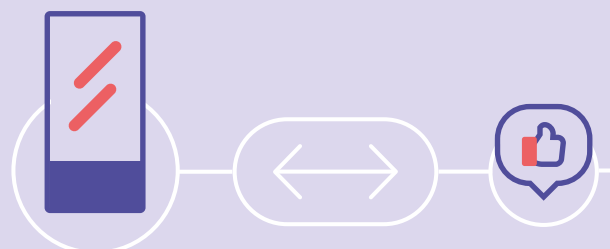
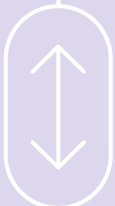
OCEAN

Posterscope



the point of social

Understanding the **why, where** and the **how**



Executive Summary

In the modern media landscape, social media has become a dominant channel for many audiences and the concept of dual-screen viewing is well understood. Generally, when we think of dual-screen viewing, we picture people at home, sitting on the sofa and using their smartphones whilst watching live TV or catch up streaming services. The corresponding **synergy and priming benefits for advertising tend to focus** on social media and TV and VOD.

However, there is a **natural synergy and dual screen and priming opportunity** between social media and Out of Home (OOH) that needs to be explored and better understood.

We know from respected studies such as the IPA Touchpoints that for All Adults, social media and OOH are the two media channels that have the **highest weekly reach and time spent per day**. When you look at these factors amongst the **all important 16-34 age group**, this synergy and dual screen priming opportunities between social media and OOH are even stronger.

social media and OOH are the two media that have the **highest weekly reach and time spent per day**.

The synergy and dual screen opportunity for OOH and social media is particularly strong for the 16-34 age group

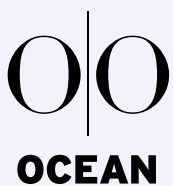
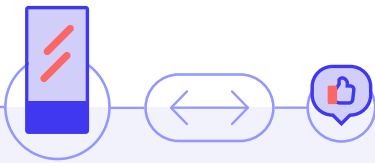
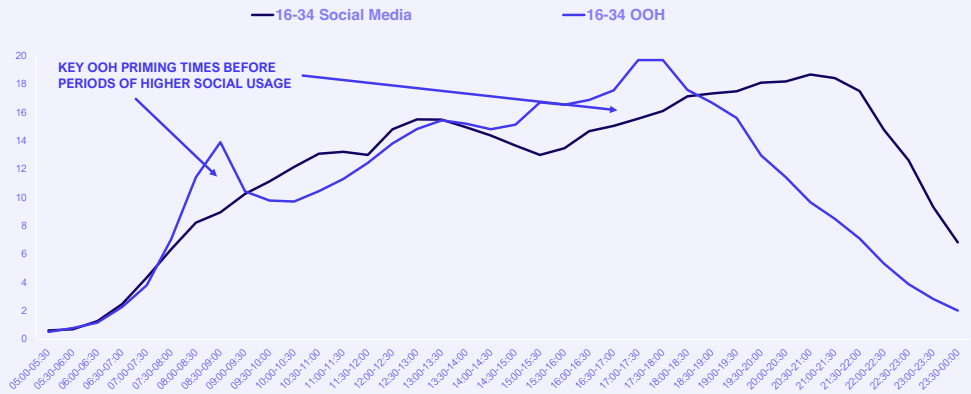


When you look at time of day from IPA Touchpoints research, the alignment between OOH and social media remains in sync throughout the day, especially for 16-34s.

And there are also some clear peaks where consumers are out of home (especially in the morning and late afternoon), providing significant priming opportunities before heavy periods of social media usage.

And this time of day synergy and dual screen opportunity between OOH and Social, especially for the 16-34 audience, is actually higher than that of live TV and paid VOD, as well as other online video.

Time of day synergies between OOH and social media are very strong



For TV, VOD and other online video channels, dual screening with social is well understood. For OOH and Social, it is less so, which is why we undertook this study, in partnership with JC Decaux, Bauer Media Outdoor, Global and Ocean Outdoor, to discover:

How does location affect social media behaviour across triggers, activities conducted and outcomes?

How does location impact attention to social media advertising?

Is there a dual screen synergy and priming / amplification opportunity between social media and OOH advertising that hasn't been fully recognised?

This ground-breaking three stage research study helped us to answer those questions and delivered some powerful insights:

1. Social media usage out of home, mostly conducted between 8am-6pm, has more triggers, involves more diverse and outcome driven activities and is more sociable
2. This more active social media behaviour during the day when out of home, leads to an 11% attention gap in daytime social media advertising
3. OOH advertising is very well positioned to address this attention gap due to its high reach, time of day synergy with social media and proven priming effects that improve the performance of social media campaigns

This research, together with the views of an expert panel discussion from our live webinar in April, have delivered insights that are not only unique, but give us real world implications for media agencies and brands.

Stage 1

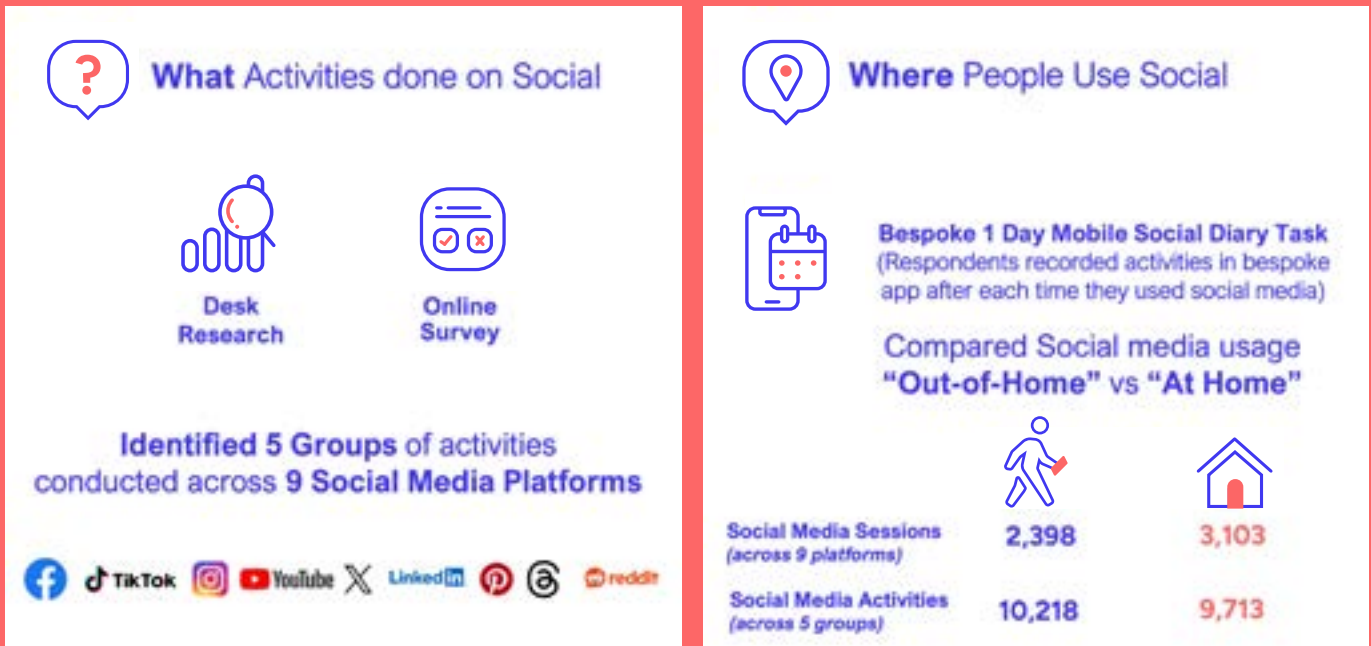


The what
and where of
social media



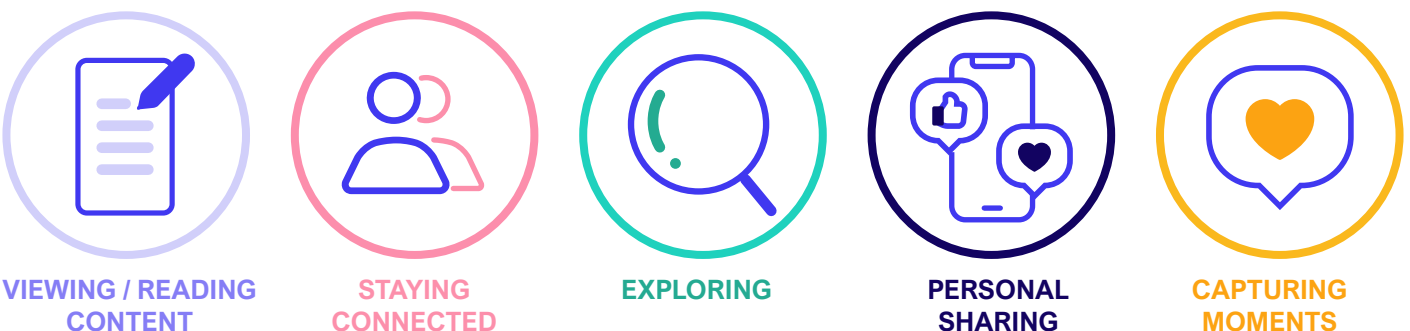
The what and where of social media

This stage conducted using **Research Partner Norstat** involved desk research, an online research study of 1,150 heavy social media users in GB aged 18-65, and a **Bespoke Mobile Social Diary Task** that captured 5,500 individual social media sessions and over 20,000 social media activities. These social media sessions and activities were then analysed based on the location they took place, either out of home vs at home.

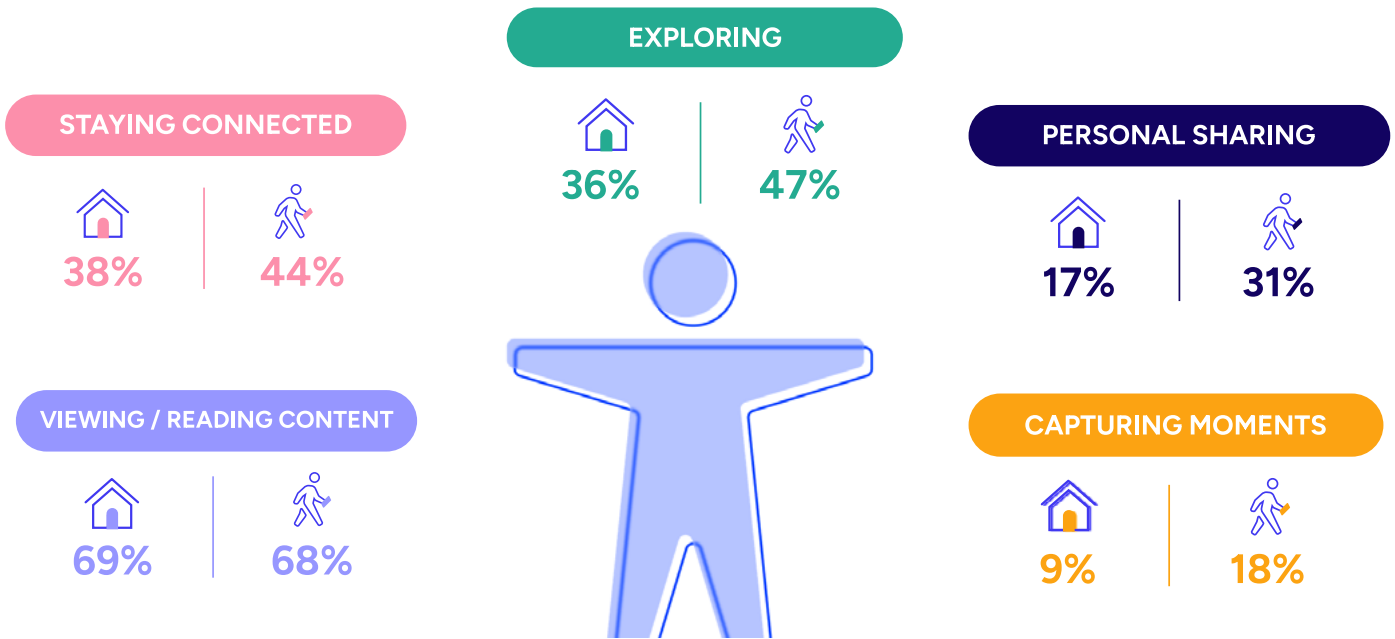


The study created a **five group segmentation** of social media behaviours, each group split further into more detailed activities. It found that some social activities were far more prevalent than others, and this was consistent in both the online survey and the one day social media diary task.

But it became most interesting when we compared **WHERE** those social activities were taking place. People were equally likely to **view or read content** at home vs out of home, whilst they were slightly more likely to use social to **stay connected** when out of home. However, when people were using social platforms out of home, they were far more likely to be **exploring or searching** for things to buy or places to go and were almost twice as likely to have actually **personally shared**, particularly **capturing moments** through taking photos or videos of things they were doing or seeing with intent to post on social.



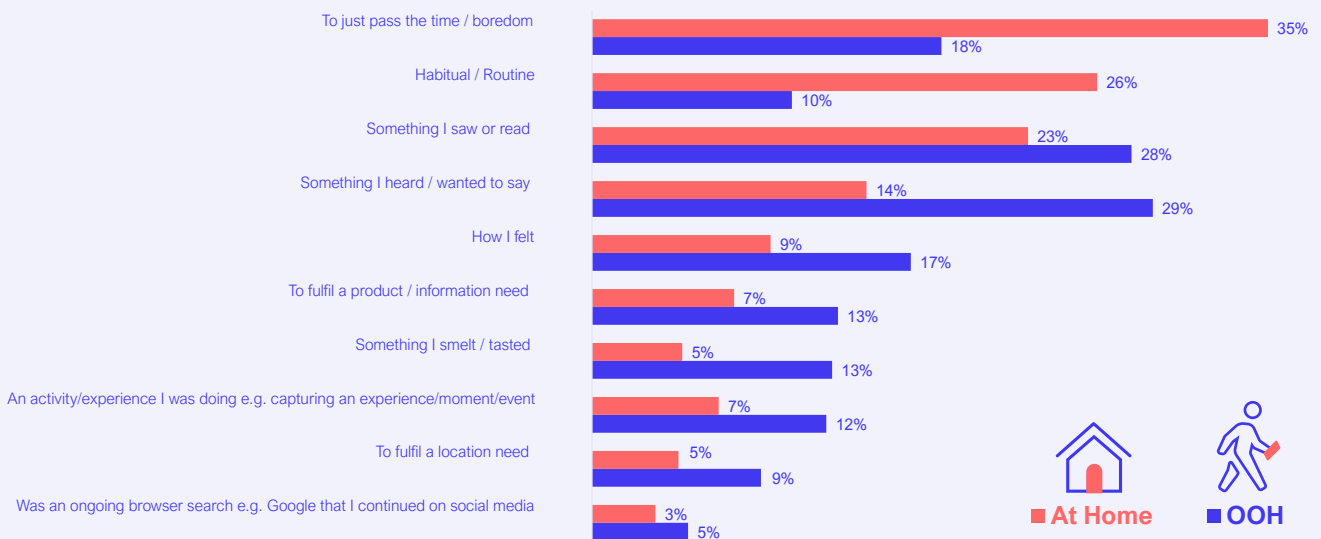
Social media usage is more diverse and active when out of home



There were many reasons why social media behaviour out of home was more diverse and active.

More triggers to use social when out of home

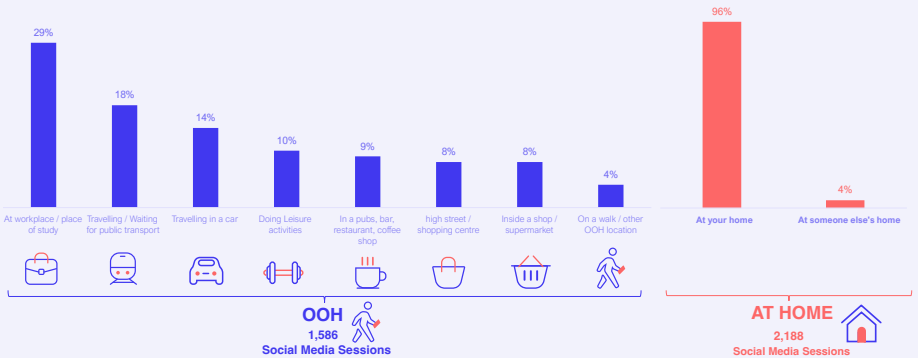
At home social media usage was mostly driven by passing the time, boredom or was just habit and routine. However out of home social media usage was more likely to be driven by something seen, moods, fulfilling product or location needs, activities being done, and in particular it was twice as likely to have been triggered by something people had heard or wanted to say (**out of home 29% vs At home 14%**).



Greater variety of locations when out of home, especially retail and leisure locations

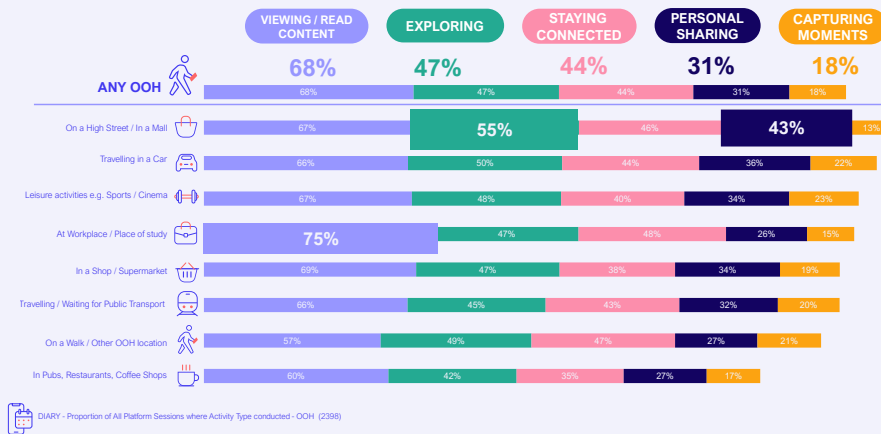
Another reason for the more diverse and active social media usage when out of home, was that people were using social in a far greater variety of locations. Often this was based on locations where people spent a lot of time such as at work or when travelling. But a large amount of social was also taking place in retail locations (high street / shopping centres / in shops), when people were doing leisure activities or in social locations such as pubs, bars, restaurants or coffee shops.

Social media activity out of home takes place in a greater variety of locations



DIARY Based on the 3,779 Social Media Sessions
DIARY Where were you while using social media during this session?

With some activity far more prevalent in certain locations



Location and context also played a significant role in shaping social media behaviour.

Workplace environments drove higher levels of content viewing (**75% vs a 68% out of home average**), whilst the retail and leisure environments of The High Street / Malls, drove higher levels of exploration around products and services to buy or getting ideas of things to do or places to go (**55% vs a 47% out of home average**).



Out of home social usage is more outcome-driven

The study also found that out of home social media usage is far more outcome-driven, with users more likely to visit websites (**31% out of home vs 27% At home**), continue their search (**33% out of home vs 24% At home**) or talk to someone (**38% out of home vs 32% At home**). But in particular, social media usage out of home was 75% more likely to lead to a purchase either in store or online (**out of home 14% vs at home 8%**).

Social media that takes place out of home is more outcome driven

VIEWING / READING CONTENT

EXPLORING

STAYING CONNECTED

Made a purchase in-store or online



8%



14%

+75%

Explored / searched on Social media about it



24%



33%

Visited a website



27%



31%

Talked to someone (in person or online)



32%



38%

Contacted a business / seller



2%



5%



DIARY - Activities of VIEWING READING CONTENT / EXPLORING / STAYING CONNECTED - OOH (8,063) / At Home (8,354)
You mentioned you did ACTIVITY for CATEGORY on PLATFORM during this social media session. What actions have you already done as a result of this?

social media usage out of home was 75% more likely to lead to a purchase



And that increased propensity to make a purchase is because the context of out of home environments, particularly in retail settings, encourages exploration on social media about products, services, reviews and offers. In fact, this exploration is nearly **three times greater in physical retail environments** than when at home.

The physical retail context encourages high levels of purchasing exploration on social when OOH

EXPLORING

Products / services / reviews / offers



13%



21%



High Street / Mall



28%

In a Shop / Supermarket



31%

"I search for products / reviews on social media when I am shopping"

61%

"I use social media to validate my purchase decisions when I am shopping"

55%



DIARY - Proportion of All 5501 Platform Sessions where Activity Type conducted - OOH (2368) / At Home (3103)

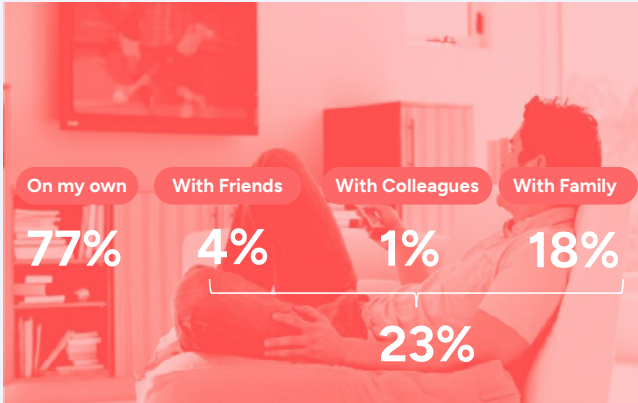


SURVEY

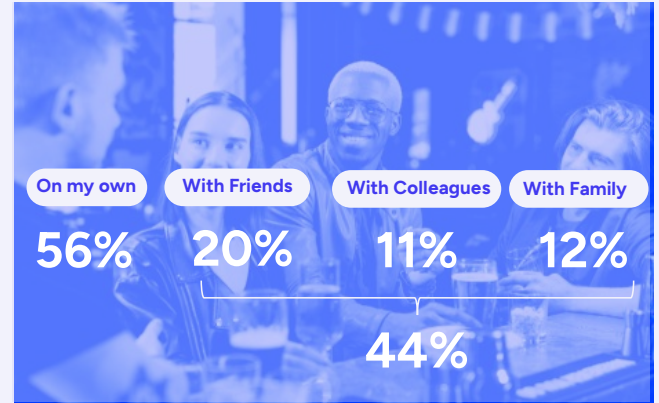
Social is more sociable when out of home.

Social media usage out of home is also more likely to take place with others, with **44% of out of home sessions occurring with other people** compared to **only 23% at home**. Out of home social media sessions were also five times more likely to be conducted in the **presence of friends (20%) vs at home (4%)**, suggesting social is far more sociable when out of the home.

AT HOME



OUT OF HOME



Nearly twice as likely to be in company when using social media out of home

 DIARY - Based on the 3,774 Social Media Sessions
Who were you with while using social media during this session?

This is important when planning around cultural events and from a behavioural science perspective. Many studies have demonstrated that when people are in the presence of others this magnifies emotions, and this was corroborated by the Point of Social study.

Each time a participant reported an individual social media activity in the diary, they were asked how positive or negative they felt on a scale of 1-10. Responses to **almost 20,000 individual activities were tracked** and overall, people were very positive. 61% of respondents rated their experience as 9 or 10 out of 10. However, that pattern varied according to whether they were on their own (**59% rating 9 or 10**) or in a group (**65% rating 9 or 10**). So clearly when people were with others, they had an even more positive experience, rating their activities **6% ppts higher**.

Out of home social media sessions were five times more likely to be conducted in the presence of friends





SUMMARY: SOCIAL MEDIA BEHAVIOUR OUT OF HOME IS FAR MORE ACTIVE



MORE TRIGGERS

There are more triggers when people are out of home that encourage social usage



MORE OUTCOME DRIVEN

There are more diverse and outcome driven activities conducted on social media when out of home



MORE SOCIABLE

Social media usage out of home is more likely to be conducted with other people, especially friends

Stage 2

The daytime
attention gap



The daytime attention gap

In the consumer diary research, we saw that **9 in 10 of all out of home social sessions** took place 8am–6pm.

We therefore hypothesised:

Does the higher volume of distractions that you have during the day, plus the more active social media usage we know takes place out of home, lead to people having less time and paying less attention to social ads during the day?

So, the next stage of the study, involved time of day analysis of social media impression and engagement data. This utilised Meta platforms (Facebook & Instagram) as that provided hour of day data and involved the analysis of 11 advertisers' annual social campaigns which spanned multiple categories. In total **3.5 billion impressions** were analysed by time of day using a per impression metric across the four different engagement measures of link clicks, post engagements, page engagements and video plays.



META

(Facebook & Instagram) social platforms used as they provided hour of day data

11 advertisers analysed across multiple categories

Retail x 4, Leisure & Hospitality x2, Alcohol, FMCG x 2, Healthcare, Utilities/Public Services

365 days of data per advertiser split by **24 hours** of the day

In total **4,000 + days** or **96,360 hours** analysed across all **11 advertisers**

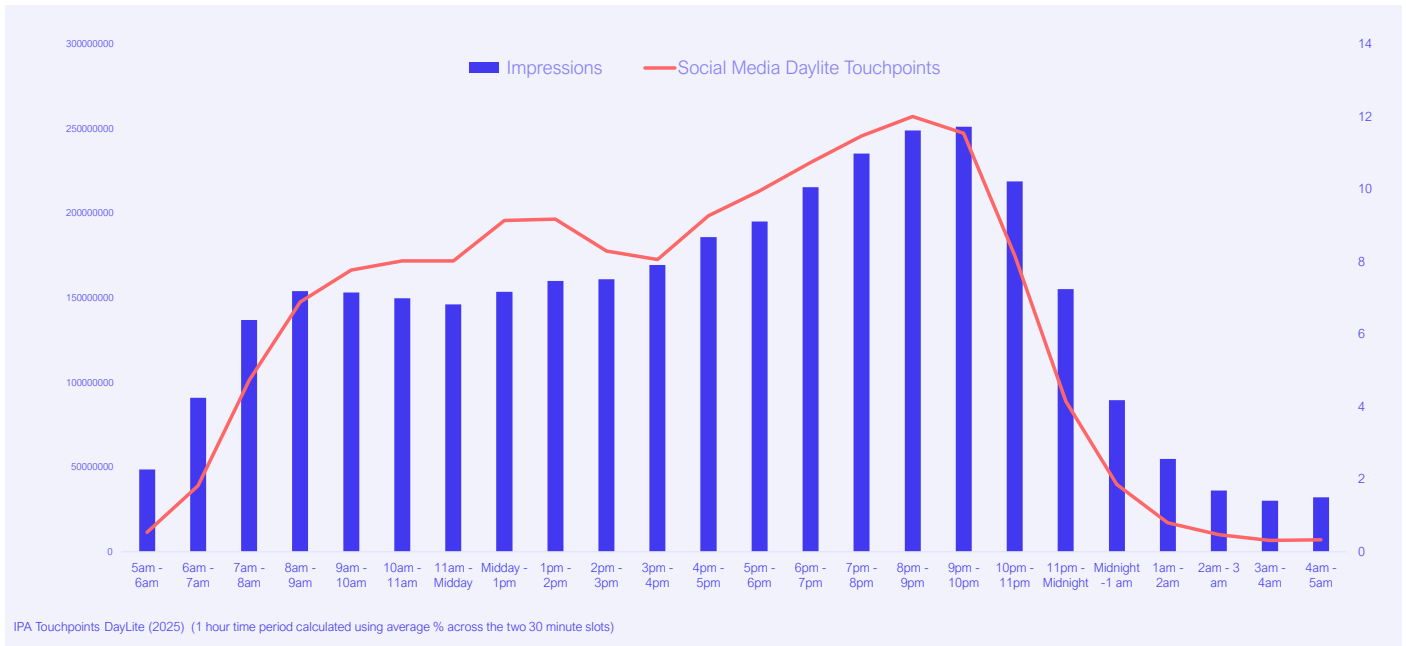
3.5 billion impressions delivered in total across **11 advertisers**

4 Engagement / Attention Metrics

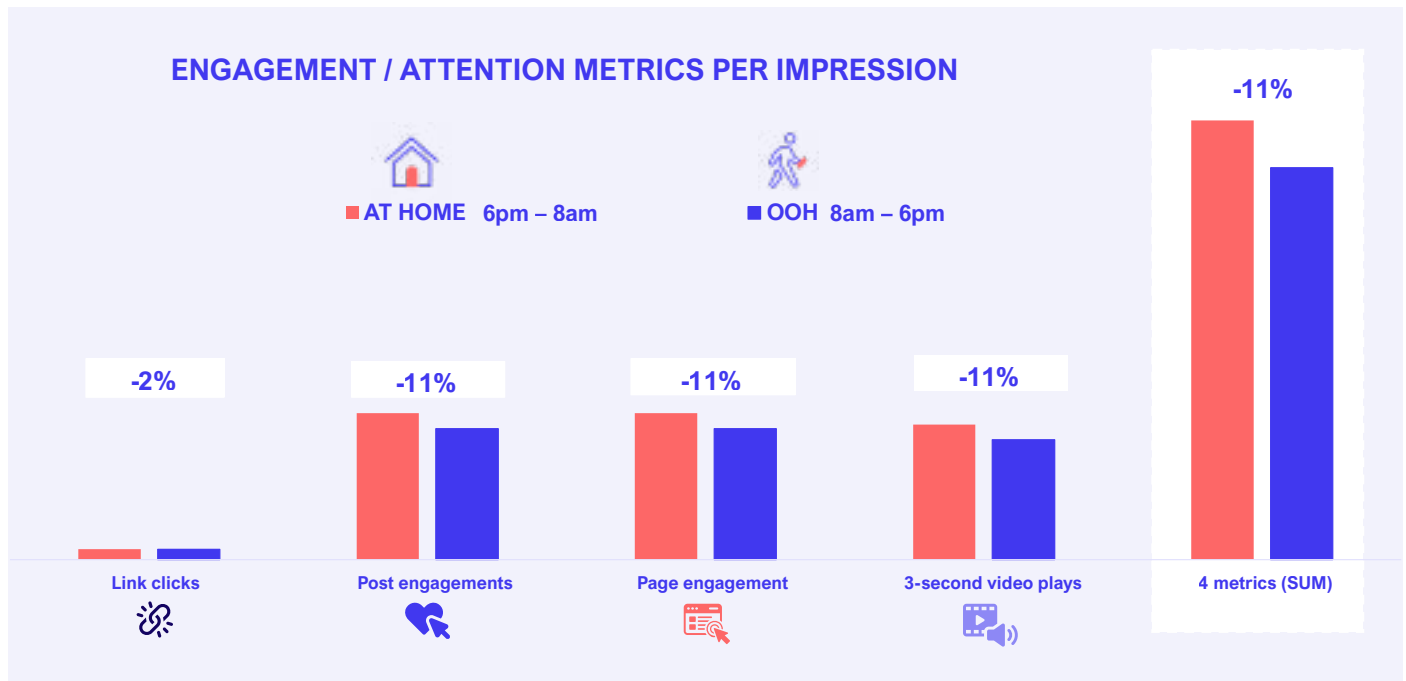
Link Clicks - **21 million**
3-sec Video Plays - **250 million**
Post Engagements – **280,000**
Page Engagements – **280,000**



Our impression analysis mirrored the social media usage measured by the IPA's Touchpoints study, with social media usage and corresponding impressions delivered increasing throughout the day and **peaking between 7pm – 10pm**



The study found that engagement per impression is consistently **11% lower during the day (8am-6pm)** when a significant proportion of social media usage is out of home compared to evening / early morning (6pm-8am) when nearly all social media usage is at home.



Stage 3



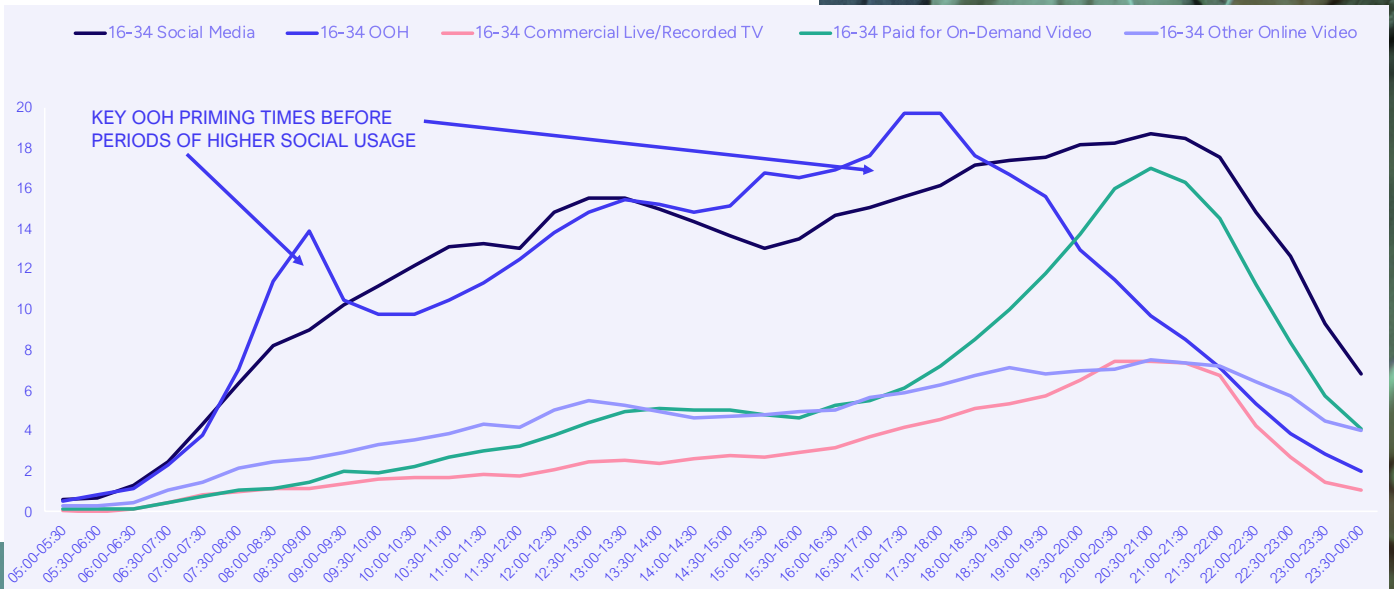
**OOH Advertising,
the social media
primer**



OOH Advertising, the social media primer

In the final stage of the study, existing research was brought together to demonstrate the strong synergy, priming and amplification effect of OOH with social media, which ultimately delivers significant benefits to brands.

The study utilised **IPA 2025 Touchpoints** data to highlight OOH advertising's high weekly reach, combined with its time-of-day alignment with social media usage. This perfectly positions OOH advertising to prime audiences before and during peak social media usage periods and this effect is particularly pronounced among the 16–34 age group, being even stronger than for AV channels.



Eye tracking and dwell time studies prove attention higher on social when primed with OOH

JC Decaux (2 Screen Future) and Ocean Outdoor (DOOH: The Vital Ingredient) both conducted research studies using similar methodologies, which proved that more attention is paid to social media adverts when people have been exposed to OOH advertising beforehand.

Both studies involved participants watching video walk-throughs of street or mall scenes with brands advertised on digital screens. Afterwards, participants completed a social media task on their smartphones, during which they were also exposed to social media ads for the same brands.

In both studies, if research participants had been exposed to the OOH ads before, eye tracking and dwell time software identified that they spent longer looking at the social media ads, on average **+42% longer** across both studies. These studies unequivocally proving prior exposure to OOH increased attention to social media ads.



Dwell Time on Social Ads when Primed with OOH

JCDecaux 2 Screen Future

Ocean DOOH: The Vital Ingredient

+42%

...more attention is paid to social media adverts when people have been exposed to OOH advertising beforehand

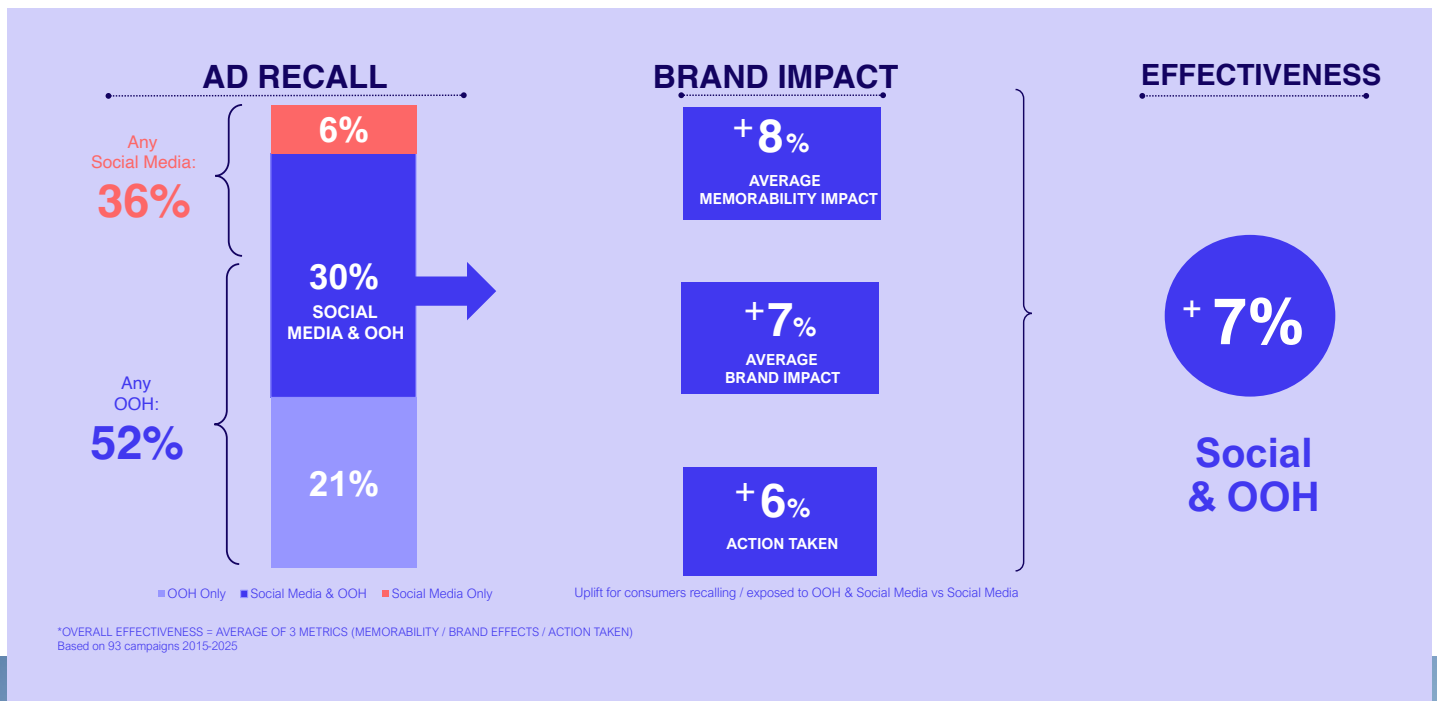


Brand KPI's highest amongst those exposed to Social & OOH advertising

The next research study used Posterscope's brand research database filtered to the **93 studies** conducted over the last decade where both OOH and social advertising were used. Across these studies, the high reach of both OOH and social was reflected in high levels of prompted ad recall

- On average **52%** respondents recalled the OOH ads vs **36%** for social media
- Importantly OOH added significant incremental reach to social campaigns, with **21%** only seeing the OOH advertising and **6%** only seeing social

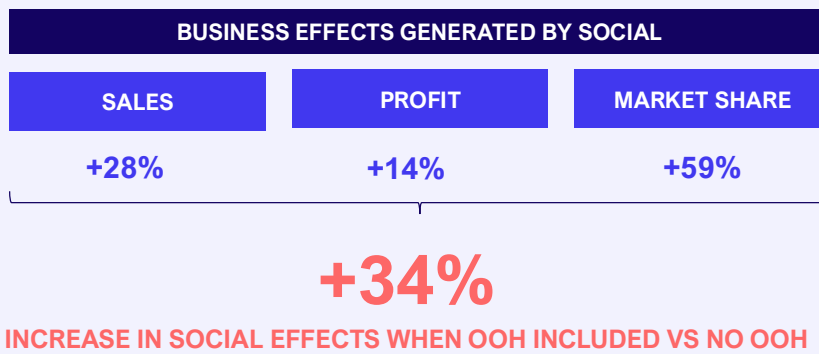
But the main finding, was that for the **30%** who had seen both OOH & Social, average brand impact for multiple KPIs across the purchase funnel, was **7% higher** (than the Any Social scores), demonstrating the **amplification effect of seeing both OOH & Social advertising**.



Social business effects significantly higher when OOH included in the media mix

The final study analysed the IPA Database to understand the business effects generated by social media with or without support from OOH advertising. This study looked at **82 campaigns**, half of which featured OOH (with outdoor accounting for at least 15% of campaign spend), the other half featured no OOH. The key finding was that the impact of social on **sales (+28%)**, **profit (+14%)** and **market share (+59%)**, was considerably higher for campaigns that featured OOH, compared to those that didn't. Overall business effects across these three core metrics were on average **34% higher** when OOH was included.

IPA Databank demonstrates how OOH boosts the Business Impact when used with social



Source: IPA OOH Database Analysis 2014-2024
OOH Power Users: OOH 15% of Media Budget (41 cases) vs Non OOH (41 cases)

//



STRATEGIC CONSIDERATIONS

This research uncovers plenty of new and potentially strategic implications in the planning and delivery of both OOH and social media activity. Our panel discussion at our recent event also provided some unique perspectives from media & marketing practitioners.



1

Think of out of home social as a conversion and conversational moment.



Daytime/out of home social usage is often closer to decision-making (not just 'lighter scrolling') so set KPIs accordingly (action, not just reach). Social media consumption when out of home is also much more likely to be in the company of others, offering increased opportunities for conversations, sharing and influence.

“Out of home social sessions are more outcome-driven, so we should look to treat them as moments when people are closer to choosing and buying”

Ciara Smyth, Managing Partner, Total Social, Dentsu

“We should be planning to attention and outcomes, not just channel inputs, and set success measures that reflect action such as store visits and conversions alongside reach”

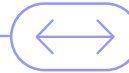
Rob Edwards, Head of Media & Digital, Arla Foods

“It’s fair to assume that people are often in company when out of home, so we need to build work that can be noticed, discussed, and shared in-the-moment”

Harry Davenport, Client Planning Partner, iProspect.

2

Consider planning both OOH and social to context and need-state.



Brief around moments (commute, retail, leisure) and attention windows. What does the consumer's physical journey look like and where might they be exposed to triggers to use social media. Feed the social algorithm with context and treat it as an input rather than a constraint.

“Build a moments map and identify everyday scalable contexts such as the morning commute, and more localised decision points such as the high street or shopping malls, that can be used to prime social media”

Ella Britton, Strategy Director & Head of Creative Planning, Mediaplus

“You need to plan the experience and define what each touchpoint should do. Whether that be to inspire or educate or convert, so you have OOH and social work as connected steps rather than separate silos”

Rob Edwards, Head of Media & Digital, Arla Foods

“Use dynamic variants that reflect local cues, such as a nearby store, or time of day, but keep brand codes consistent”

Ciara Smyth, Managing Partner, Total Social, Denstsu

3

Sequence OOH and social to create a connected journey.



Use OOH to deliver reach and context to gain attention, then use social to explore, validate and convert, working together as a narrative arc. Maintaining consistent brand cues between OOH and social so the priming effect can be picked up instantly in people's feeds.

“Prime with distinctiveness by using bold OOH, especially special builds when relevant to create salience and curiosity that people will share”

Ella Britton, Strategy Director & Head of Creative Planning, Mediaplus

“You need to build that story arc, letting OOH set up the idea then using social to extend the narrative once people are back on their mobile or at home to avoid simply duplicating the same asset across channels”.

Harry Davenport, Client Planning Partner, iProspect

“In the follow-up phase, ensure social answers the questions people use it for in real time such as price, availability, or reviews, so they can make an ‘is it worth it?’ judgement”

Ciara Smyth, Managing Partner, Total Social, Denstsu

“Human insight is really important here in order to interpret the nuance of customer journeys, what their likely need state is and what the location means to them. We need to choose when local relevance beats generic efficiency”.

Rob Edwards, Head of Media & Digital, Arla Foods

4

Capture demand with 'search on social' + creators.



Ensure you are running paid, organic and creator coverage that harvests the demand generated by OOH advertising and behaviours in the physical space, whilst finding ways to creatively connect the two so that both media are participants in the customer experience.

"Ensure OOH, local search and social are joined up in the planning. Use local cues in OOH to trigger intent, then capture it with local search coverage that reinforces community and brand meaning on social".

Ella Britton, Strategy Director & Head of Creative Planning, Mediaplus

"Because out of home social is often group-based, design assets and hooks that travel via sharing and conversation, not just individual clicks"

Harry Davenport, Client Planning Partner, iProspect

5

Align teams early in the planning process.



Bring OOH, social, search and creative into the brief from the start, so context, sequencing and creative treatments are intentional rather than retrofitted. Set shared success metrics and build tech stacks that can act on data triggers.

"Cross-channel thinking needs to sit with the planners as they are the ones who often get the brief first, so need to bring in all parties right at the start"

Harry Davenport, Client Planning Partner, iProspect

"Measure how the channels work together, not in isolation. Use measurement that can capture the combined lift of OOH and social and the impact of time and location, rather than forcing each channel to 'claim' the outcome on its own."

Ciara Smyth, Managing Partner, Total Social, Dentsu

"You need to build operational speed. Data connectivity, the trigger points, approvals and production workflows must work fast enough to deliver relevant creative while the moment is still live"

Rob Edwards, Head of Media and Digital, Arla Foods

Conclusion



The Point of Social study has shown a clear synergy between social media and OOH. It has also demonstrated the dual-screen synergy and priming opportunities that are available during the day, especially for younger audiences.

The key takeouts are that social media usage during the day is:

- More action oriented, driven by a far broader range of triggers, in more diverse locations.
- More outcome focused, driving searches, visiting websites and most importantly, 75% more likely to lead to a purchase.
- Twice as likely to be in the company of other people, and five times more likely to be in the company of friends. Brands need culture to build, and culture is built in the company of others.

The study has also confirmed what we hypothesised – that attention to social media advertising might be less during the day when there are more distractions. Our comprehensive analysis showed a –11% attention gap during the day when people are out of home.

And we have highlighted the wealth of evidence that when OOH and Social are used together they have strong positive impacts on major brand KPI's across the funnel, and measurable business metrics.

With high reach, strong time-of-day alignment and proven priming effects, OOH is well placed to do what a feed often can't during the day: win attention in the real world, make the brand easy to remember, and increase the chances that people notice and act on related social media activity later.

The strategic opportunity is to plan for context and connected experiences, not isolated channels. That means identifying the moments that matter using OOH to prime distinctiveness and intent, and then using social for real-time discovery and capturing demand through paid, organic and creator ecosystems. Creative consistency across OOH and social is critical so prior exposure is instantly recognised and can do its job.

To take full advantage of what our study has shown, brands need to work in a more joined-up way. Bring OOH, social, search and creative teams together early, agree what success looks like, and measure the results in a way that shows how the channels work together. Map the key moments in people's day and plan an OOH-to-social sequence around those moments, and make sure the creative and measurement are in place so you can deliver the plan and prove its impact.

Ultimately, with all these evidence points and considerations, if you are thinking about social media for your brands, you really need to be thinking about OOH as well.

A strong dual-screen synergy
And priming effect during the day

More diverse, action-oriented, social use during the day

Social media has an 11% attention gap when OOH is at its strongest

Proven ability to amplify attention, brand and business KPI's

Think Social. Think OOH