

## Why it's time to reconsider how we look at OOH viewing to linear TV channels

Because the video marketplace has grown more and more complex, there is an ever-increasing need for accountability and efficiency. This has led to major changes in the collection of audience data and its reporting and analysis. While this evolution has unfolded across both linear and OTT video, Out of Home (OOH) viewing to linear channels has been largely ignored or viewed simply as an extension of in-home TV usage. This circumstance has occurred due to the difficulty inherent in measuring this media. Unfortunately, this results in negation of the value that can be provided by delivering messages in the OOH environment, which can both expand reach and reinforce in-home advertising. With the current state of video measurement, the “unreachables” may not be gone, but only off the radar - out of home and out of sight.

Over the last several years, I have studied and analyzed OOH audiences in many different forms. Through this research, I have concluded that OOH should be looked at as separate from and not merely an extension of the in-home audience. The differences between in home and out of home viewing should be considered when evaluating this sizable piece of the total TV audience and how it is measured and reported. Below are several key areas that are often overlooked, and anyone wanting to understand this media landscape needs to take into account the following aspects of OOH viewing, particularly in a multi-channel environment.

### **Channel Availability**

In an in-home environment, whether in your own home or a guest in someone else's, there may be hundreds of channels available covering the full scope of channels in distribution, any of which can be viewed. In an OOH environment, the channels that are available to be viewed are limited and curated by the venue. This has a major impact on shares. The channels that get coverage within the venues will get much larger shares than they would have in-home. There will be

greater dichotomy between the channels with the most viewing, and even those in the middle and lower end of the viewing spectrum. In a curated environment, lead-ins may matter more than ever.

### **Presence or Absence of Sound**

Based on my experience, more than half of the OOH viewing that occurs is with muted TV. Often in a location, there are multiple TVs showing a variety of different channels and, at most, one of these will have sound. Based on that assumption, if there are three or more channels available, then 65% or more will be muted. If viewing is picked up using audio methods then, using the example cited, 65% of the time it would be to the wrong source. Audio methods of determining viewing also have difficulties picking up the signal where there is significant ambient noise. In other words, the quieter the environment and the fewer the people in it, the greater the likelihood that the channel will be picked up. While the value of viewing to a muted set might be different than that of one with full sound, it is substantially more than zero which is how it is counted today.

### **Big Events Rule the Roost**

Major events are group viewing opportunities and OOH lift for these programs is substantially greater than for standard TV programming. It is common that a single major event will garner 50% of the total OOH viewing at a given point in time across all venues.

### **Changing Channels with a Nod of your Head**

In-home, we are able to physically change channels and this is currently measured in a variety of existing ways. In a multi-screen OOH environment, however, we change channels by moving our heads and shifting our focus and attention. Any measurement of OOH video usage needs to be able to differentiate between what you can hear and what you choose to watch. Attention needs to be a part of any OOH metric. If you are in a bar **watching** the NBA Playoffs on ESPN on a muted set while NBC is airing an NHL Playoff on one with sound whether you are paying attention or not, NBC will get the credit for the viewing. If both are muted or if there is too much ambient noise then no one will be counted. In both cases the key behavior and what is measured are two different things.

### **What is on is not a Question**

In-home, we have some idea in broad terms what is airing on a particular set of channels but it is limited. Conversely, in a multi-channel environment we can see what is on every option at all times. Shifting of attention and focus from channel to channel is significantly more dynamic.

### **OTT May Lead to More OOH**

With OTT viewing leading to more cord-cutting, this cord-cutting may result in more OOH viewing. If an “event” is not on a channel you receive at home, then alternatives such as viewing in OOH locations becomes a viable option.

### **Traffic**

Viewing will differ based upon traffic patterns at a venue. Gyms will be different from bars and restaurants which will differ from offices. The times at which an individual will be at one of these locations will be substantially different from times at which they are available in-home.

OOH viewing of linear channels represents what may be the largest missing piece of the unmeasured video audience. It cannot be accurately measured using audio techniques and it cannot be properly valued if thought of as simply extended in-home audience.

Understanding viewing in a multi-channel environment requires metrics which reflect behavior, traffic, location, and most importantly, focus and attention. OOH viewing of linear channels is currently unreported or severely under-reported. Many researchers feel if something is not measured it does not exist. It would be well worth the industry’s effort to examine this “missing” audience from a new point of view. Tunity can supply the answers.