



# Outdoor Observers: Understanding engagement with outdoor advertising

Created by: Nielsen Media Research

Date: 12/03/07

Data: National Panorama survey Jan-Dec 2006

nielsen

## The context

Every week more than 2 million New Zealanders engage with Outdoor Advertising. 823,000 people, the Outdoor Observers, indicate they see outdoor advertising every day.

## About this report

This report is an opportunity to share with all those who need to communicate a message a sense of the way in which New Zealanders engage with Outdoor Advertising as they go about their daily lives. It is designed to be a snapshot of what is available from the ongoing study that Nielsen Media Research have conducted over the last year. Collected as part of Panorama, New Zealand's leading multimedia consumer study, questions on outdoor advertising are now available for analysis as part of any strategic or tactical analysis for marketing or communications plans.

Out of Home advertising is now available alongside other main media and can be analysed against any of the over 30,000 variables available in Panorama. From FMCG to automotive, from finance to clothes shopping, you can understand how consumers in any of these sectors engage with Out of Home advertising.

All the information is sourced from the period January 2006 to December 2006 and is based on a sample size of 12,000 people 10 years and over

## How the quintiles were built

The "opportunity to see outdoor advertising" quintile model uses the following data to predict an individuals "opportunity to see" quintile bracket (bottom 20% group right through to the top 20% group).

1. *Number of specialty store types visited in the last month*
2. *Forms of transport used to travel to place of work/study*
  - *Car (Alone)*
  - *Car (Shared/Pool)*
  - *Bus*
  - *Train*
  - *Ferry*
  - *Taxi/Hired Car*
  - *Bicycle*
  - *Motorbike*
  - *Walk/Jog*
  - *Work From Home*
  - *Don't Work Or Study*
  - *Other Form Of Transport*
3. *Normal travel time to and from work - total round trip*

4. *Typical weekday/weekend*
  - *Drive in traffic*
  - *Visit a shopping mall*
  - *Walk in the street*
  - *Ride on a train*
  - *Ride on a bus*
  - *Travel on motorway*
  - *Travel on a major city road*
  - *Visit a supermarket*
  - *None of these*
5. *Area type lived in (Based on area unit of interview)*
  - *Metro Urban (Auckland, Hamilton, Wellington, Christchurch, Dunedin)*
  - *Provincial Urban*
  - *Secondary/Minor Urban/Rural Centre*
  - *Rural*

These are analysed against responses to statements about outdoor advertising recall to determine correlation and average recall rating. The statements and rating scale are listed below:

*Outdoor Advertising Recall Statements:*

1. *I can remember some of the billboards I've seen in the last week*
2. *I can remember seeing advertising on buses in the last week*
3. *I can remember seeing roadside billboard advertising in the last week*
4. *I have noticed illuminated advertising posters inside a shopping centre in the last week*
5. *I have noticed advertising inside the airport terminal, my last time there*

*Statement Rating Scale:*

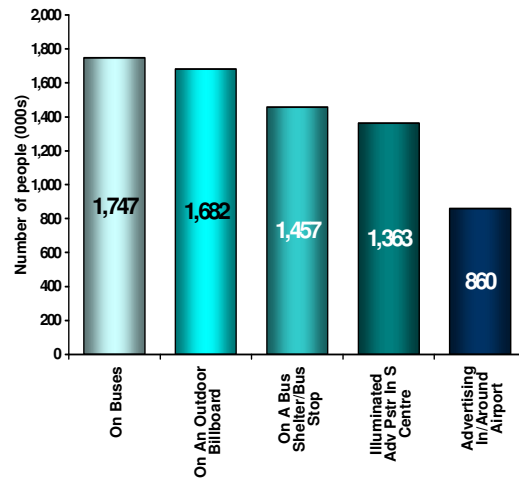
1. *Definitely Disagree*
2. *Tend To Disagree*
3. *Neither Agree Nor Disagree*
4. *Tend To Agree*
5. *Definitely Agree*

Those variables with a higher correlation are given a higher "importance weight" in the final "opportunity to see" calculation. The average recall rating of each variable code is then multiplied by the importance weight of that variable to calculate an average "opportunity to see" value for each respondent (regardless of their claimed recall). Respondents are then ranked from lowest to highest and divided into 5 quintile groups of 20% each as shown below (based on weighted 000's rather than raw counts).

1. *Lowest Opportunity To See*
2. *Low/Medium Opportunity To See*
3. *Medium Opportunity To See*
4. *Medium/High Opportunity To See*
5. *Highest Opportunity To See*

## The Out of Home Audience

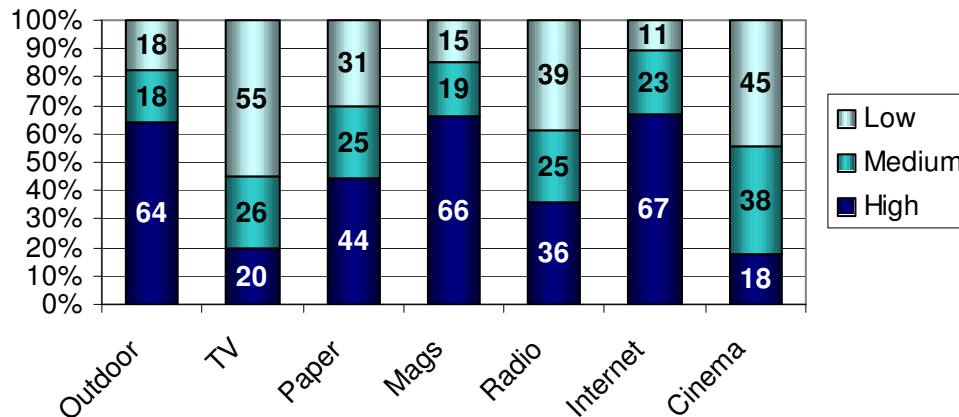
In 2006, 72% of New Zealanders over 10 years of age said they had seen Outdoor advertising in the last seven days. That's more than 2.1 Million people exposed to Bus backs and shelters, taxis, billboards, airport and shopping centre illuminations - in any given week during the year.



## Opportunity to see Out of Home

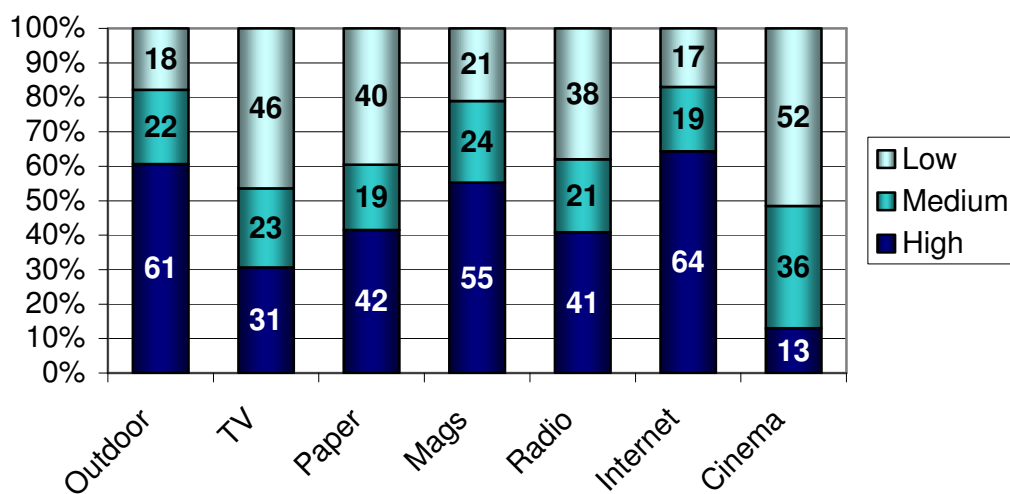
This information now allows us to include and compare opportunity to see Out of Home with other media when planning advertising campaigns. The following charts show some of the multi-media synergies across some demographics identified as having high opportunity to see Out of Home:

Media Usage - All 18-44 year olds with Household Income \$80k+



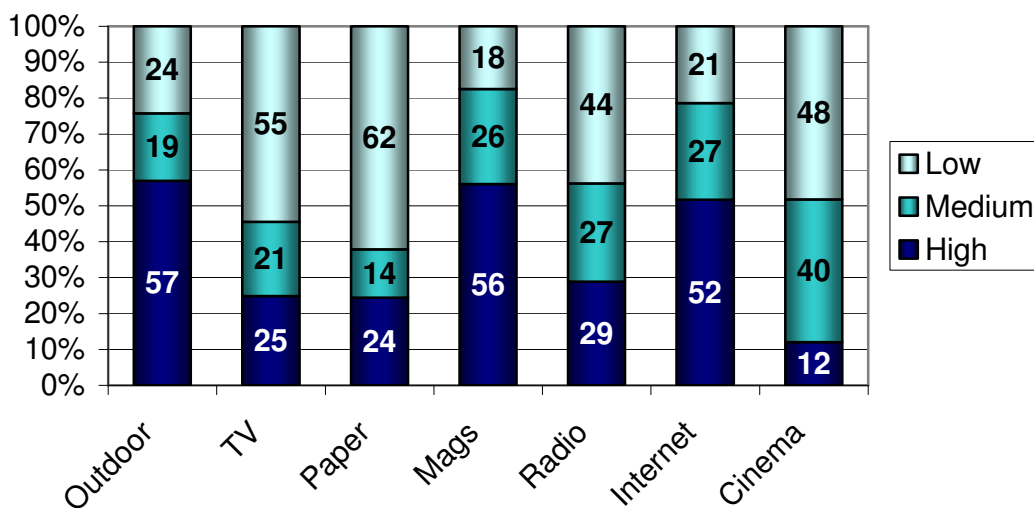
A mix of magazines and online with radio or newspapers in support would combine well with out of home to reach this demographic group.

### Media Usage - Males 30-49 top three Occupation groups



The addition of males to this target audience has increased the profile of newspapers in the media mix.

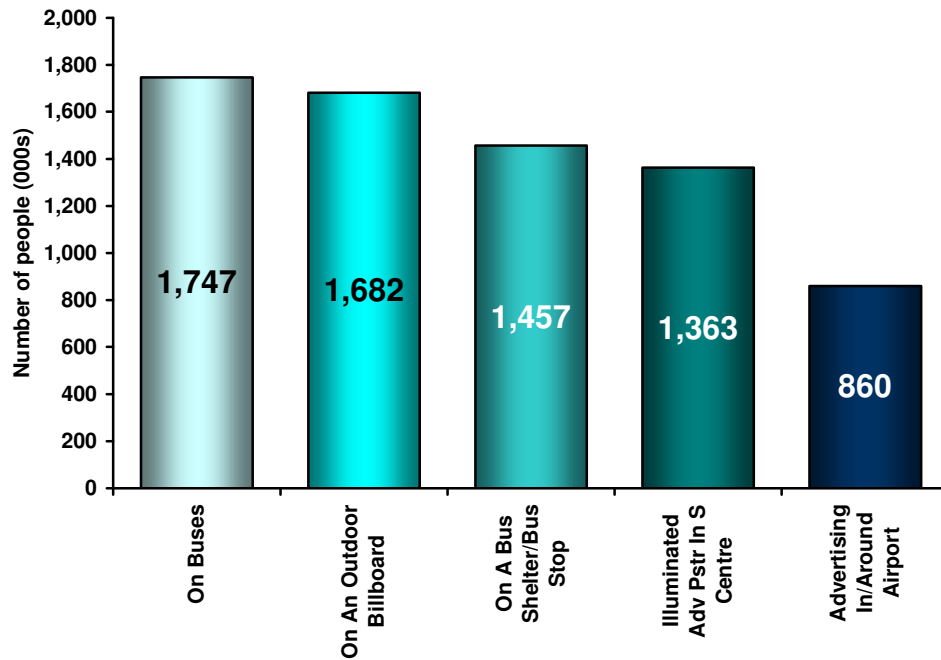
### Media Usage - Females 25-39 years Socio 1/2



The female demographic has a much stronger weighting to magazines and on-line in combination with out of home.

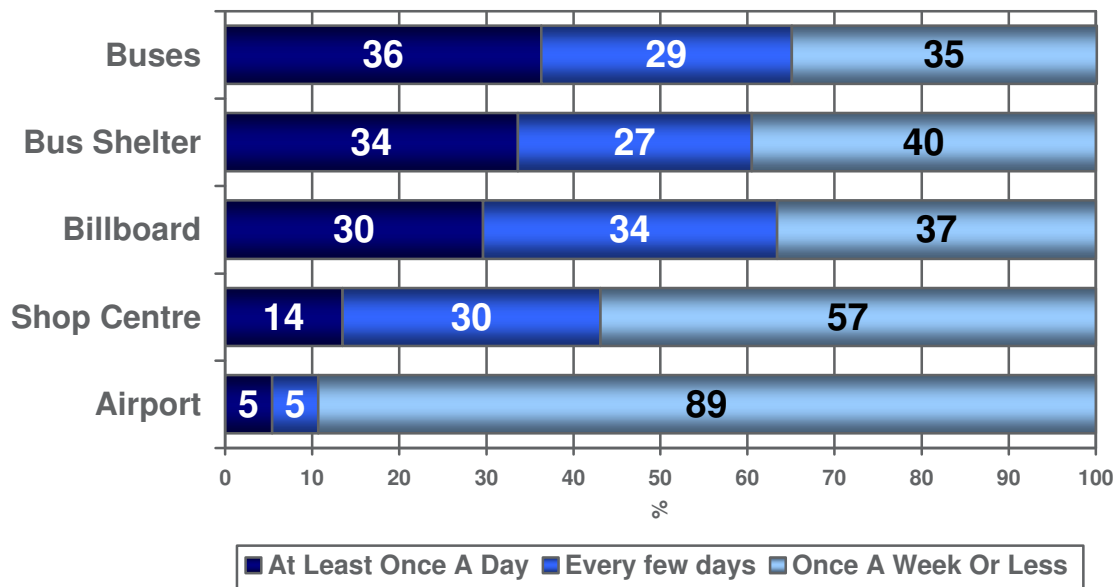
## Where are these New Zealanders being reached?

Over 1.7 million New Zealanders mentioned seeing bus back advertisements, 1.6 million outdoor billboards, 1.4 million bus stop signage and 1.3 Million illuminated advertising posters in shopping centres.



## How often do people see Out of Home advertising?

823,000 New Zealanders see Out of Home advertising at least once every day; over one million more people are reached every few days. 668,000 New Zealanders indicate they have seen all six outdoor advertising media in the last seven days.



## Different locations, different audiences

The placement of the outdoor advertising impacts on those it reaches. There are differences in the profile of those who see signs in airports or on taxis compared to buses, bus shelters and shopping centres.

For example, those who see advertising in airports or on taxis are more likely to be business managers, executives or self-employed; at 40+ they are slightly older; their personal incomes are likely to be higher. Whereas, people engaging with outdoor advertising on buses, bus shelters or in shopping centres are likely to be younger (aged 20+) with slightly lower personal incomes.

## The Outdoor Observer



The 823,000 daily viewers of outdoor advertising, the **Outdoor Observers**, are more likely to be male, with one in five aged 20-29 age and similar numbers 30-39. 71% are living in the Metropolitan areas, with 43% located in Auckland.

### Lifestyle

Outdoor Observers are more likely than the rest of the population to be:

- White collar workers or students
- Middle Income
- Well educated e.g. University Graduates
- Socio Levels 1 to 3
- Success Driven or Balance Seekers (PALS)
- On the go

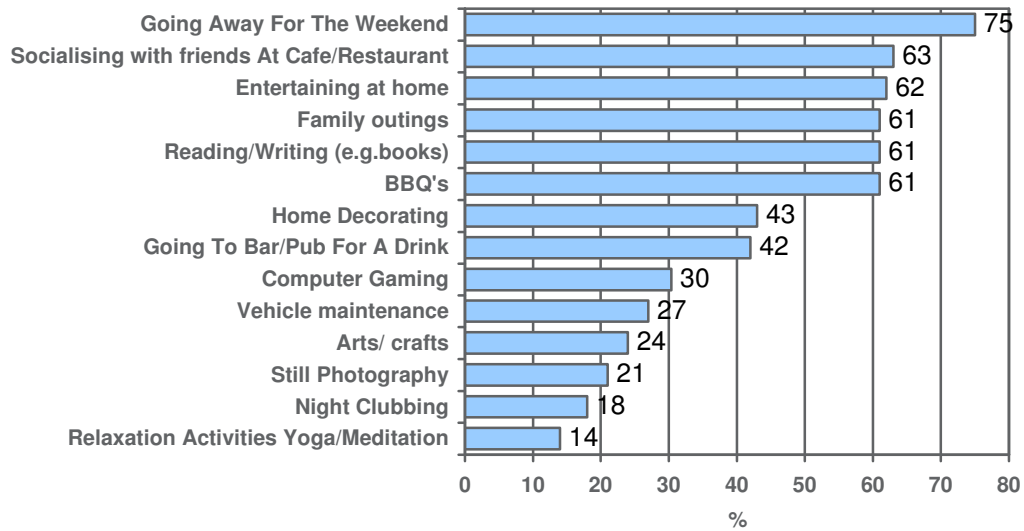
The Outdoor Observer is often likely to be on the go socially for both work and play. They state that they go to the gym regularly, play a lot of sport and have a busy social life. They are often out buying takeaways, or shopping for clothes and personal items with Saturday and Thursday being their biggest shop days (including grocery shopping). Spending most spare time with friends they enjoy dining out/ going to hotels, bars / clubs, visiting art galleries, theatre and concerts.

Other top attitudes and beliefs are a reflection of their lifestyle choices such as their desire to be successful, their love of sports and fitness, openness to new ideas and a positive attitude to their country, family and the environment, coupled with the fact they are increasingly time poor.

## Social interests and Outdoor Observers

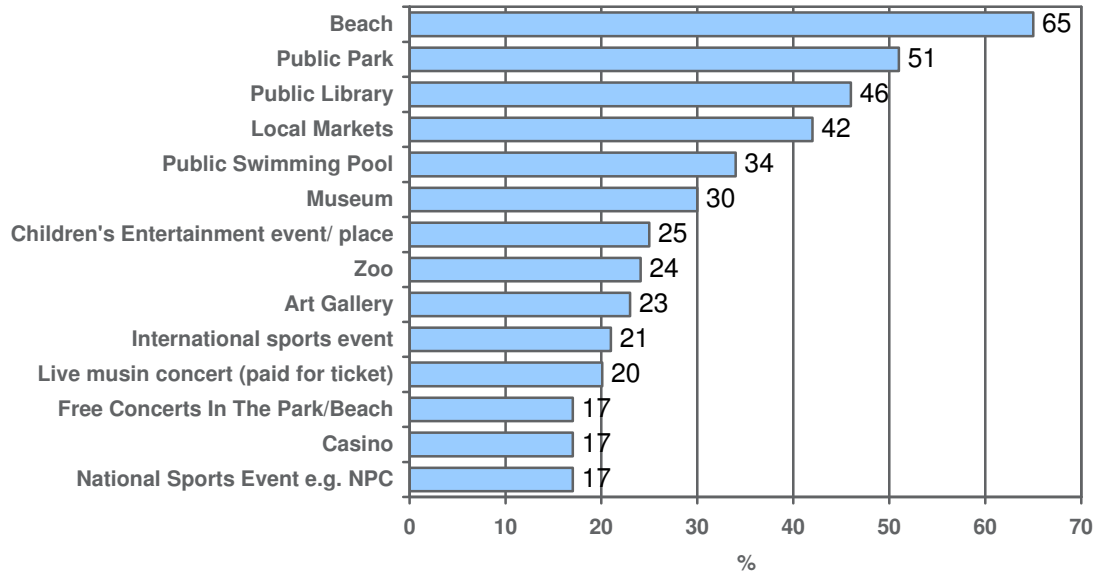
The Outdoor Observer is more likely than the rest of the population to involve themselves in many social interests.





## Places attended in the last year

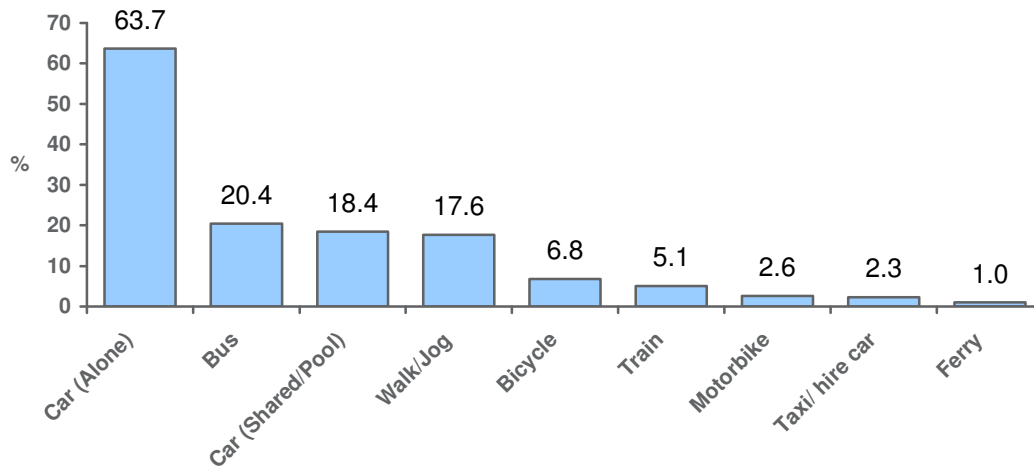
The Outdoor Observers is active, exposed messages in leisure time as well as commuting. These figures give good indicators for both placement of the advertising and the message itself.



## An attentive audience

Outdoor Observers are often in transit. When asked their main mode of transport to and from home for work or study the findings were that most drove alone in their cars, followed by more than a quarter of them taking the bus.

Over half of this group take more than 20 minutes to get to and from work offering an attentive audience for an extended period.



## Engagement with other media

Understanding the media behaviour of the Outdoor Observer.



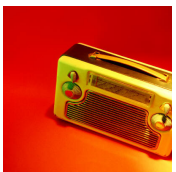
44% of Outdoor Observers spend over 151 mins per week on average on the Internet (excluding time spent on email). This compares with 35% of all New Zealanders aged 10+.



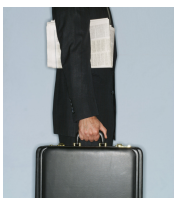
52% are heavy magazine readers, reading 6 plus publications, this compares with 46% of all New Zealanders aged 10+.



43% of Outdoor Observers are light TV viewers (up to 15 hours a week) while a further 21% are moderate TV viewers (15-21 hours per week). They watch slightly less television than all New Zealanders aged 10+.



Outdoor Observers are moderate to heavy radio listeners. 41% listen to more than 10 hours per week and 23% to between 4 and 10 hours.



53% of Outdoor Observers are light daily newspaper readers (0-2 daily newspapers read per week). Another 17% are moderate readers (3-5 daily newspapers per week). They are less likely to be heavy daily newspaper readers than the general population.



15% of Outdoor Observers have been to the cinema 5+ times in the last six months, this compares with 12% of the general population. A further 33% have been 2-4 times in the last six months.