

RIGHT ANGLE
OUT OF HOME

**DUBAI BUS QUEUE SHELTERS
MEDIUM & CAMPAIGN PERFORMANCE
APRIL 2009**

Research objectives



Right Angle is committed to investing in research in the OOH arena and providing an accountable platform to advertisers in the region. Right Angle appointed Mars Media Services to conduct research on the following objectives:

- Awareness of medium
- Sources of Awareness
- Brand recall on Bus Shelters
- Creative performance on Bus Shelters
- Media impact on buying decisions

Methodology and Sample Profile



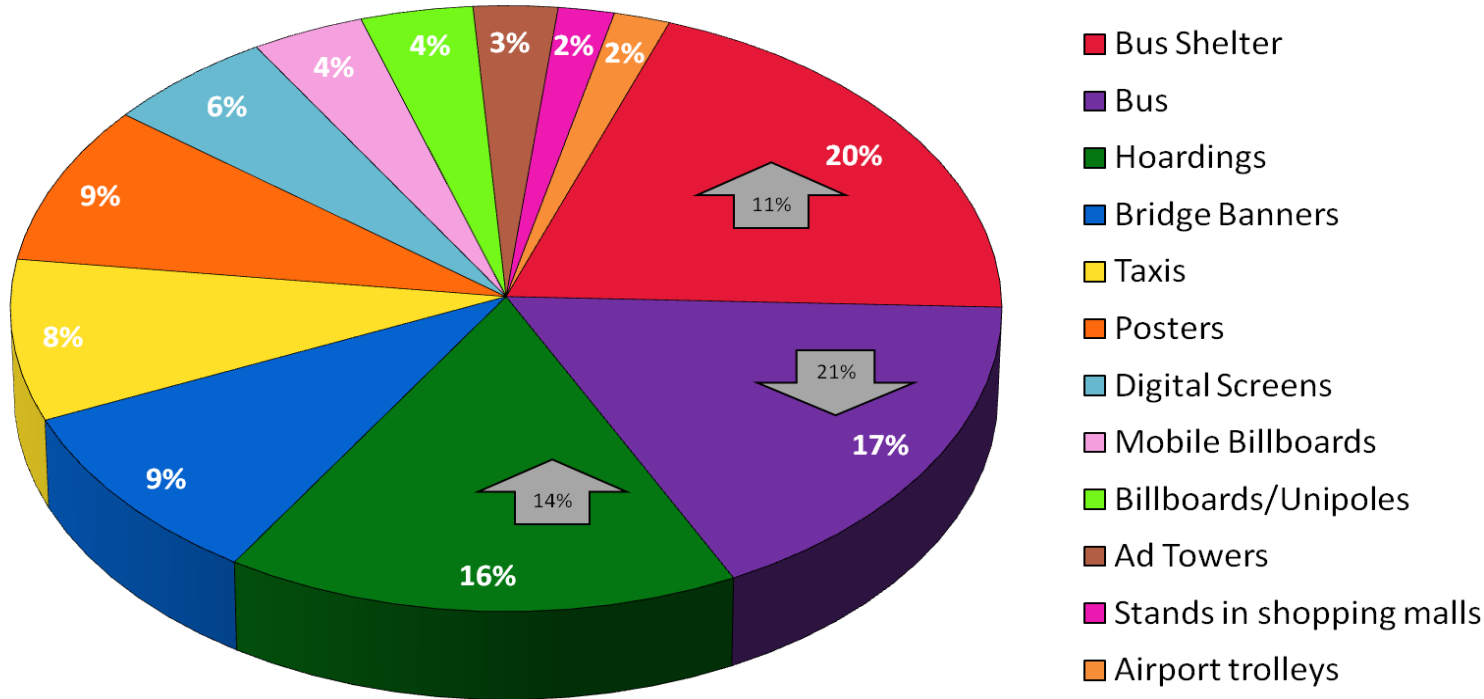
Findings were generated via face-to-face interviews following a fully-structured questionnaire.

- **Study centers** : Dubai only
- **Nationality** : All
- **Gender** : Male & Female
- **Age** : 18 - 45 yrs

Total	Male	Female	18-25	26- 30	31- 35	36-40	41-45	Locals	Expat Arabs	Asians	Westerners
250	175	75	45	75	47	47	36	35	60	125	30

Key Findings

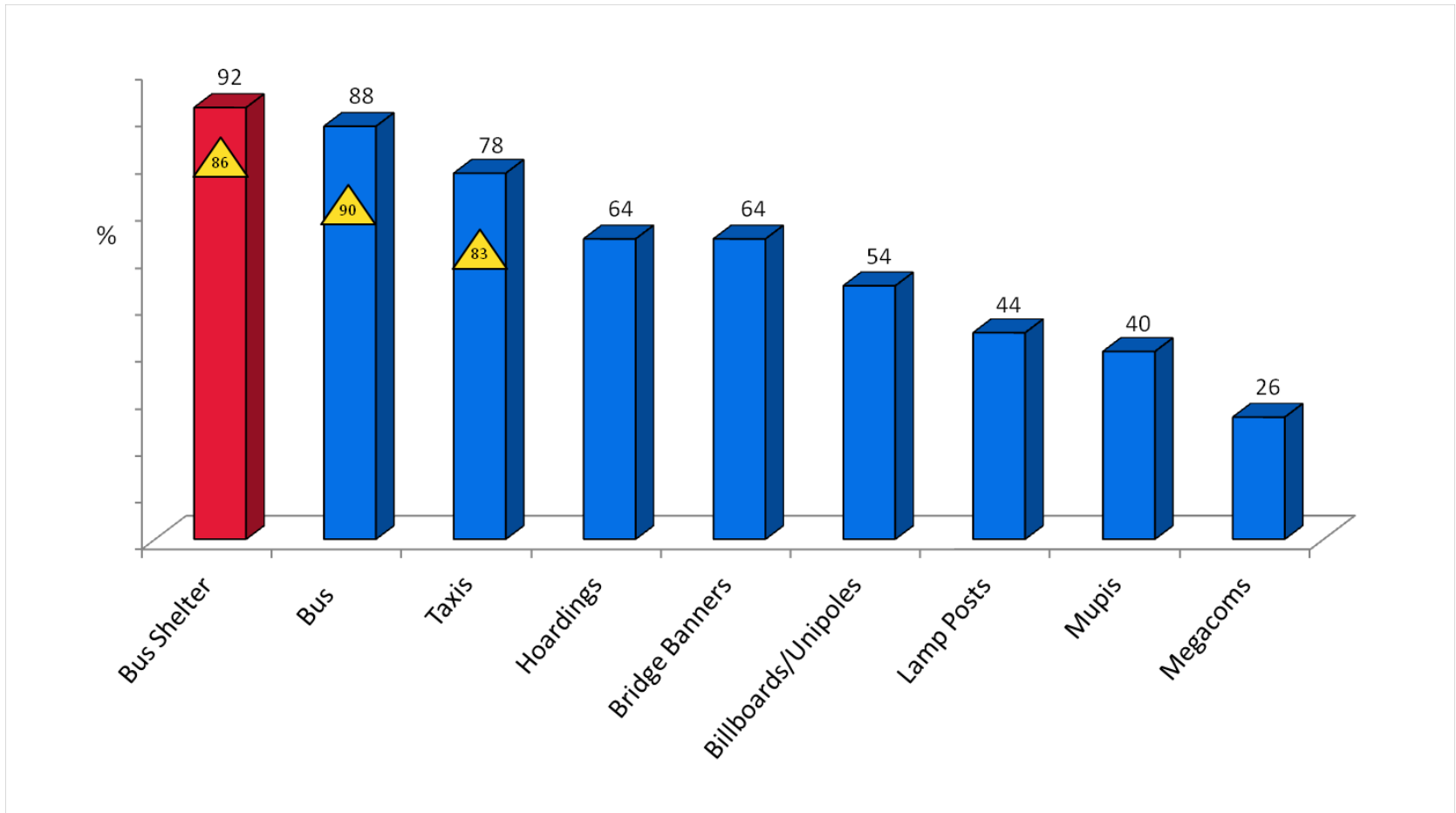
What OOH Media are you aware of? (First - mentioned)



- Bus Shelters rank #1 in unprompted recall at 20%
- Megacoms, Mupis, and Lampposts were not identified by respondents in the First-mentioned Awareness list.

(Numbers in arrows represent research numbers from Nov 2008)

Awareness of OOH advertising media in Dubai (Total)

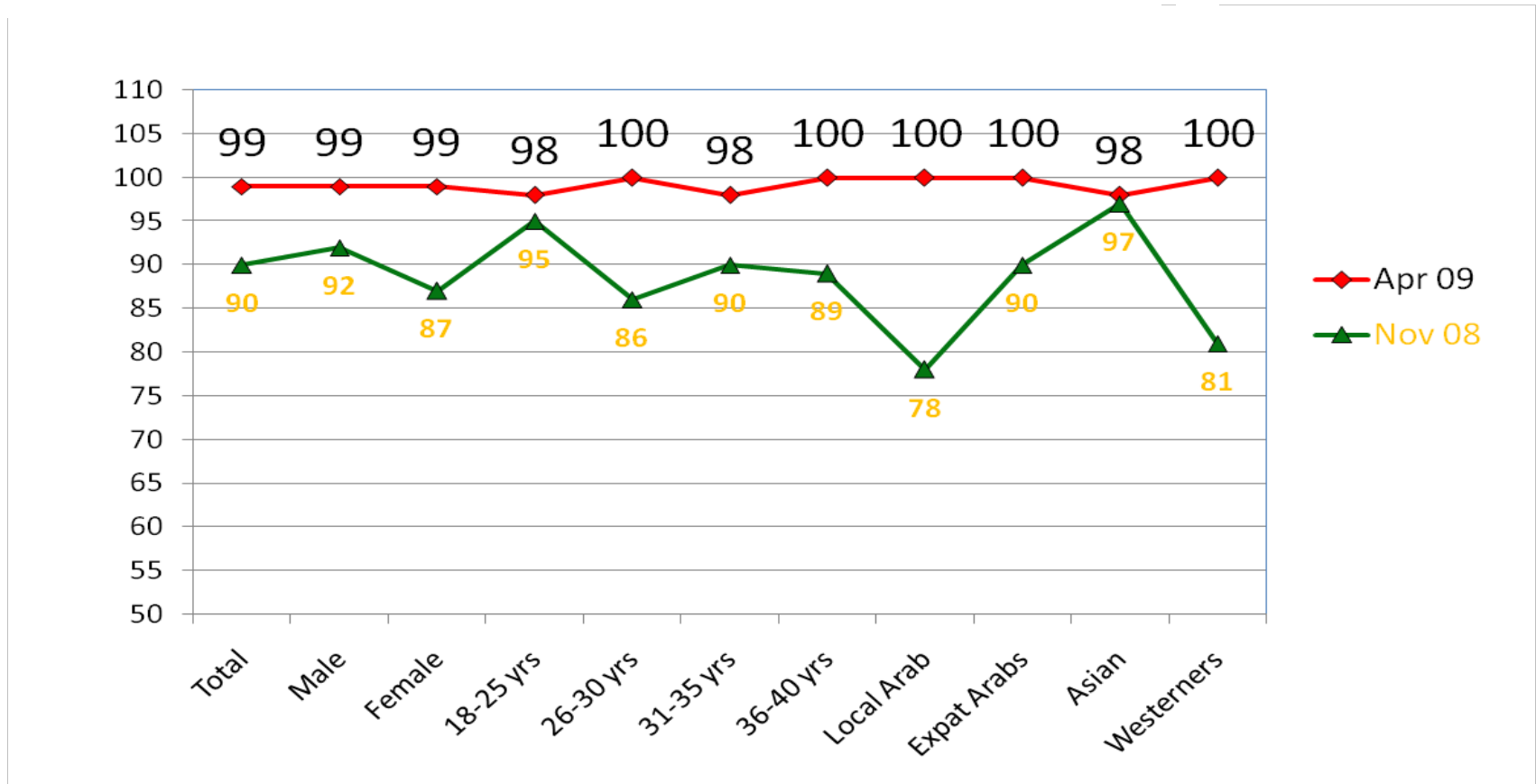


- Total awareness ranking of Bus Shelters has increased from 2nd place in November '08 wave to 1st place in April '09.



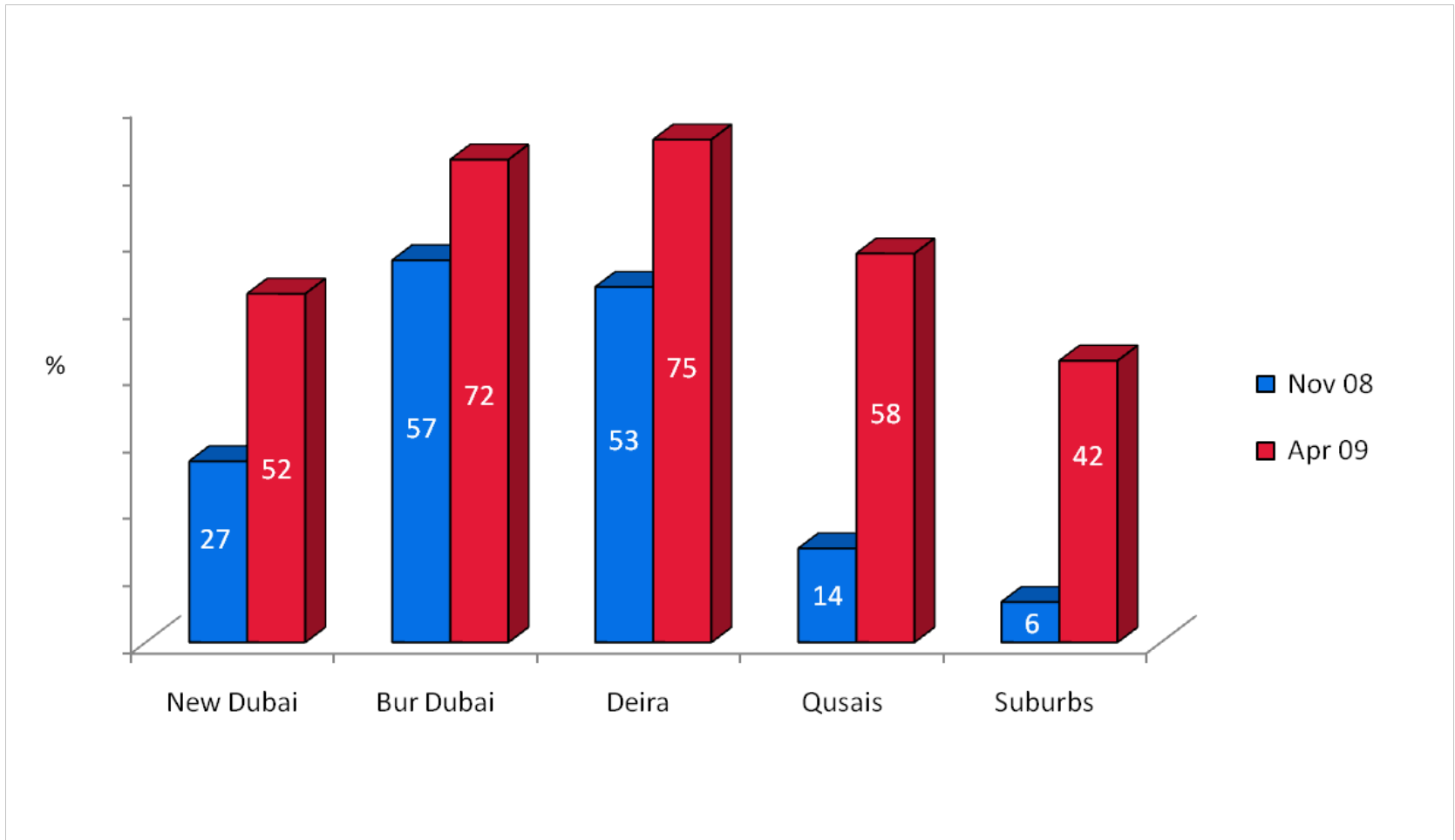
(Represent research numbers from Nov 2008)

Awareness of Bus Shelters after showing visuals



- 99% of respondents are aware of Bus Shelters as an advertising medium across all target demographics.
- Awareness in the Local Arab and Westerners categories increased from 78% and 81% , respectively, to 100% in each group, thus now establishing total citywide coverage for Bus Shelters.

In what areas have you seen Bus Shelters?



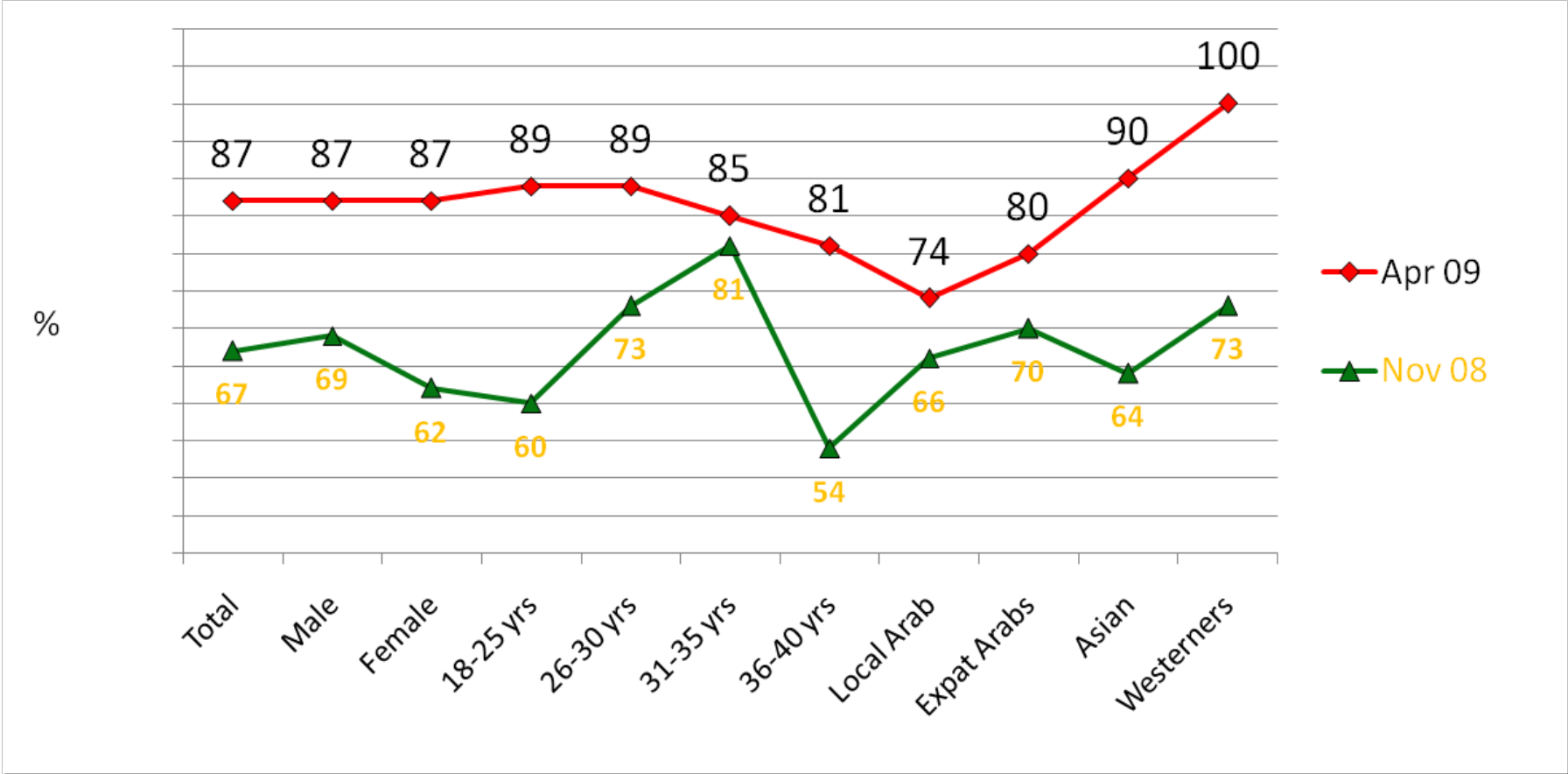
- Within 5 months (Nov '08 – Apr '09), all locations showed substantial increase in awareness levels, thus proving the Bus Shelters' citywide reach and coverage.

Brand Awareness

Have you noticed any ads recently on Bus Shelters?

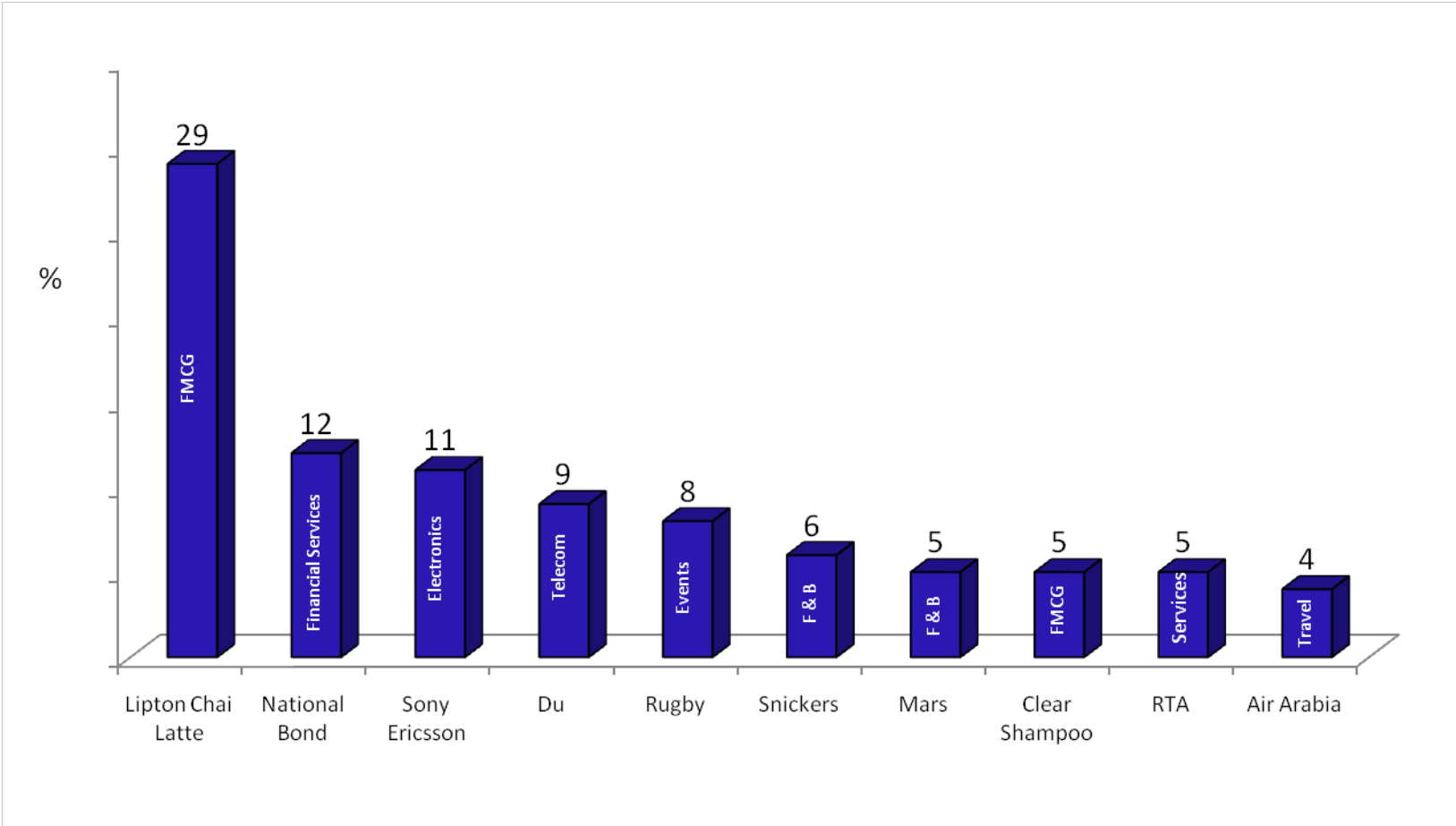


YES, I have...



- Almost 9 out of 10 respondents have noticed advertisements on Bus Shelters.
- There was increased awareness of advertising on Bus Shelters in all target demographics.

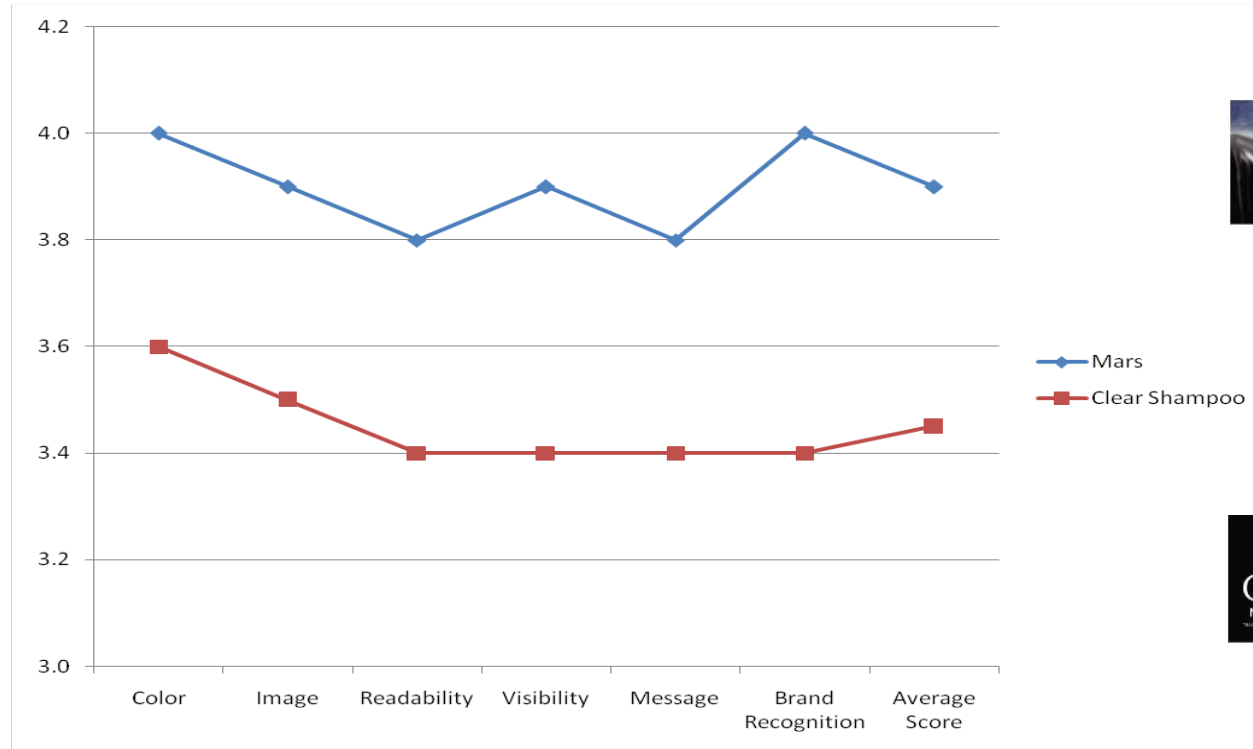
Brands seen recently on Bus Shelters (First-mentioned)



- All brands that achieved first-mentioned awareness were displayed on Bus Shelters.
- A wide range of advertising categories use Bus Shelters for their OOH advertising.

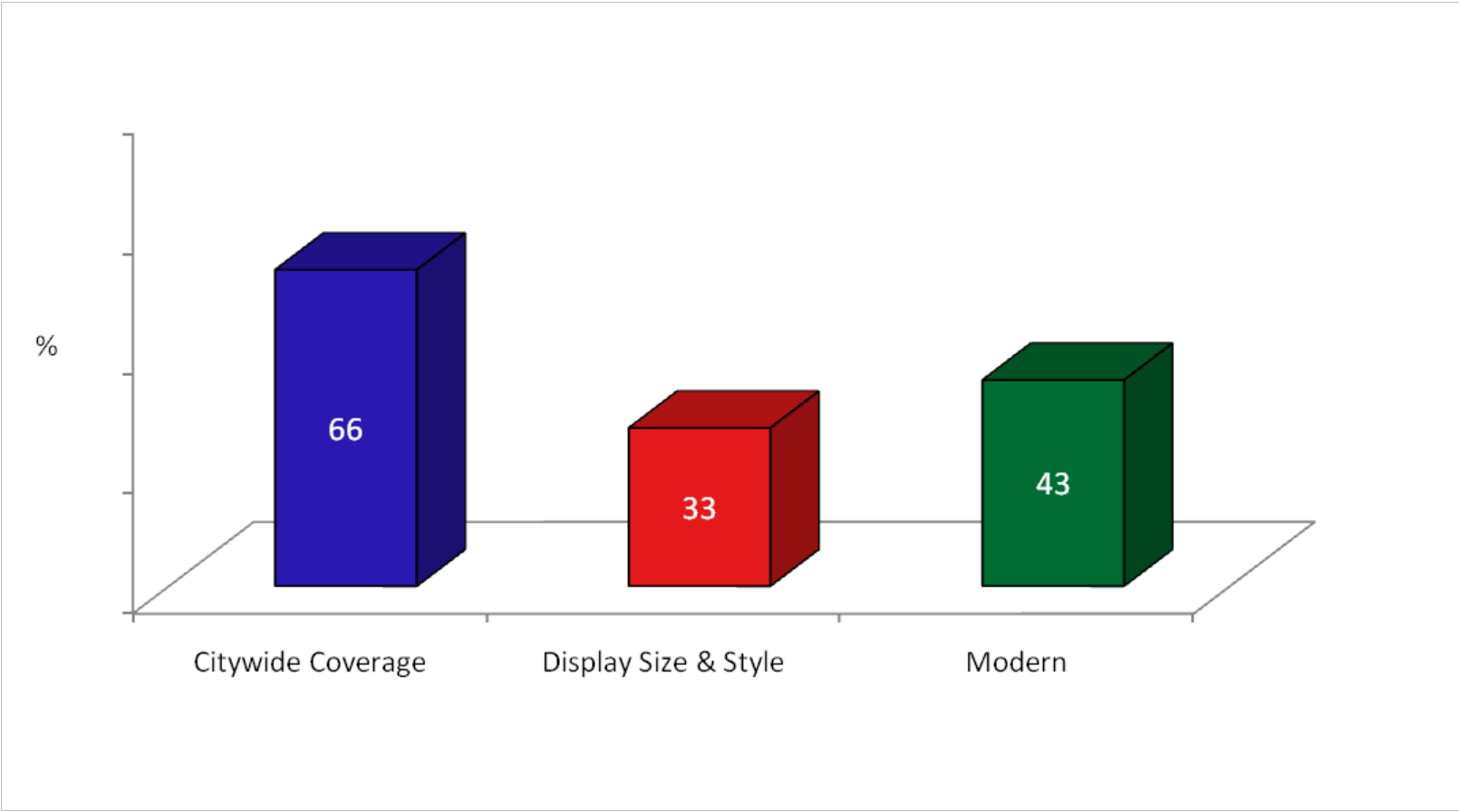
Creative Testing

(Scale is 1 through 5; 1 being lowest and 5 being highest.)



- Mars creative campaign achieved one of the highest average creative scores at 3.9.
- The Clear Shampoo campaign was given one of the lowest average creative scores. Based on this research data, the creative campaign was changed to be more appealing to target audiences.

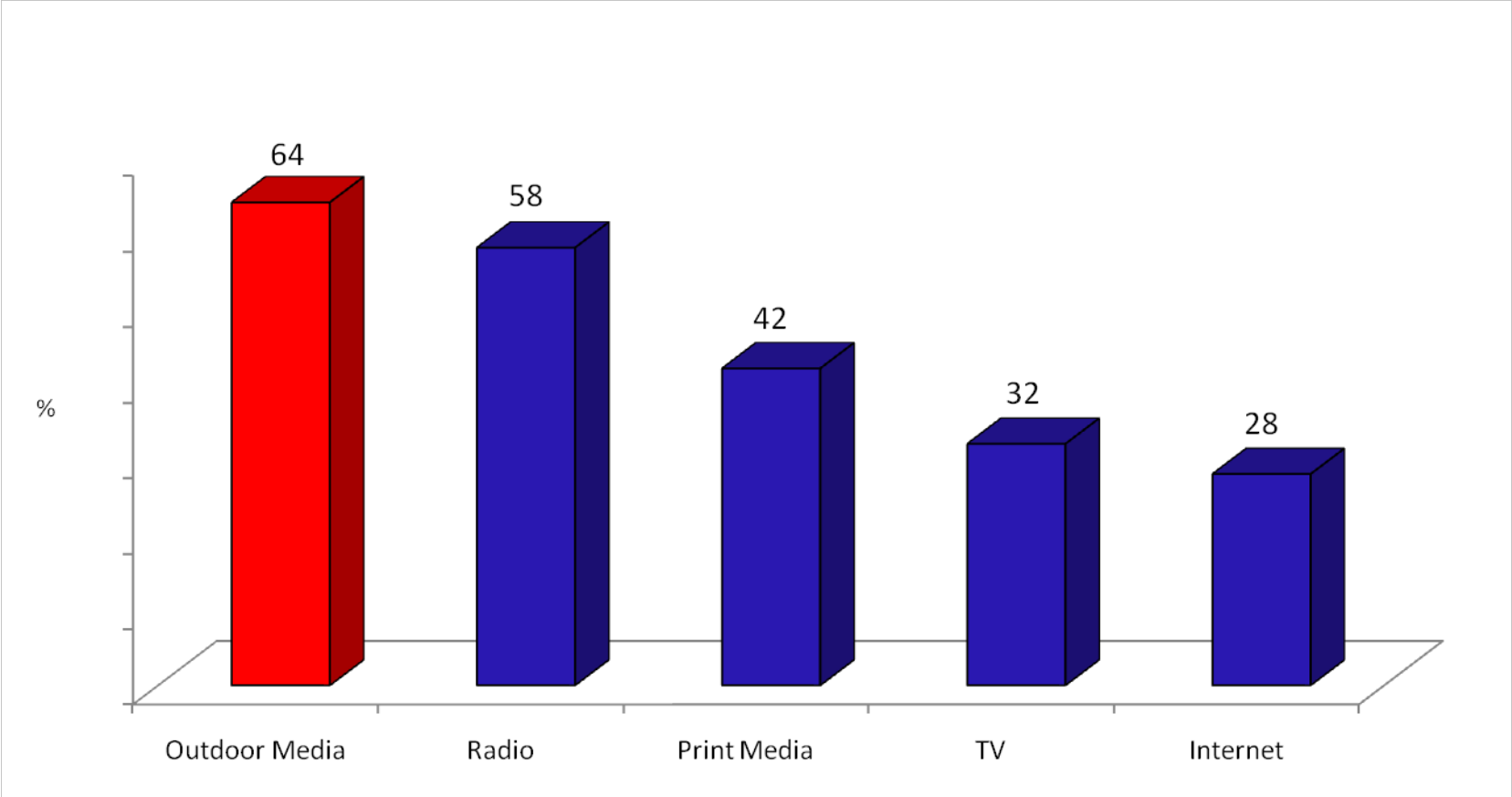
How are Dubai BQS different from other outdoor media?



- Visibility, frequency and design of the medium are the elements perceived to be unique in the Dubai Bus Shelters.

Medium affecting purchase choice

Which media consistently influences the brands you purchase?



- OOH is the most effective medium for influencing consumers' choice of brand purchase.

Conclusion

All in all, ...

- Bus Shelters ranks #1 in awareness levels in OOH mediums in Dubai.
- 99% of respondents are aware of Bus Shelters as an advertising medium across all target demographics.
- Almost 9 out of 10 respondents have noticed advertisements on Bus Shelters.
- Within 5 months, all locations showed substantial increase in awareness levels, thus proving the Bus Shelters' citywide reach and coverage.
- There was increased awareness of advertising on Bus Shelters in all target demographics.
- A wide range of ad categories use Bus Shelters for their OOH advertising.
- Visibility, frequency and design of the medium are the elements perceived to be unique in the Dubai Bus Shelters.
- Outdoor has the most acknowledged significant impact in influencing every day buying decisions.

Thank You