

RIGHT ANGLE
OUT OF HOME

**DUBAI BUS QUEUE SHELTERS
MEDIUM & CAMPAIGN PERFORMANCE
NOVEMBER 2008**

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 (Unaided and Aided)
- Sources of Awareness
- Its contribution to ad awareness
- To assess Right Angle Media's performance
- Public effectiveness perceptions of OOH offerings
- Public perceptions of the Street Furniture product

Methodology and Sample Profile



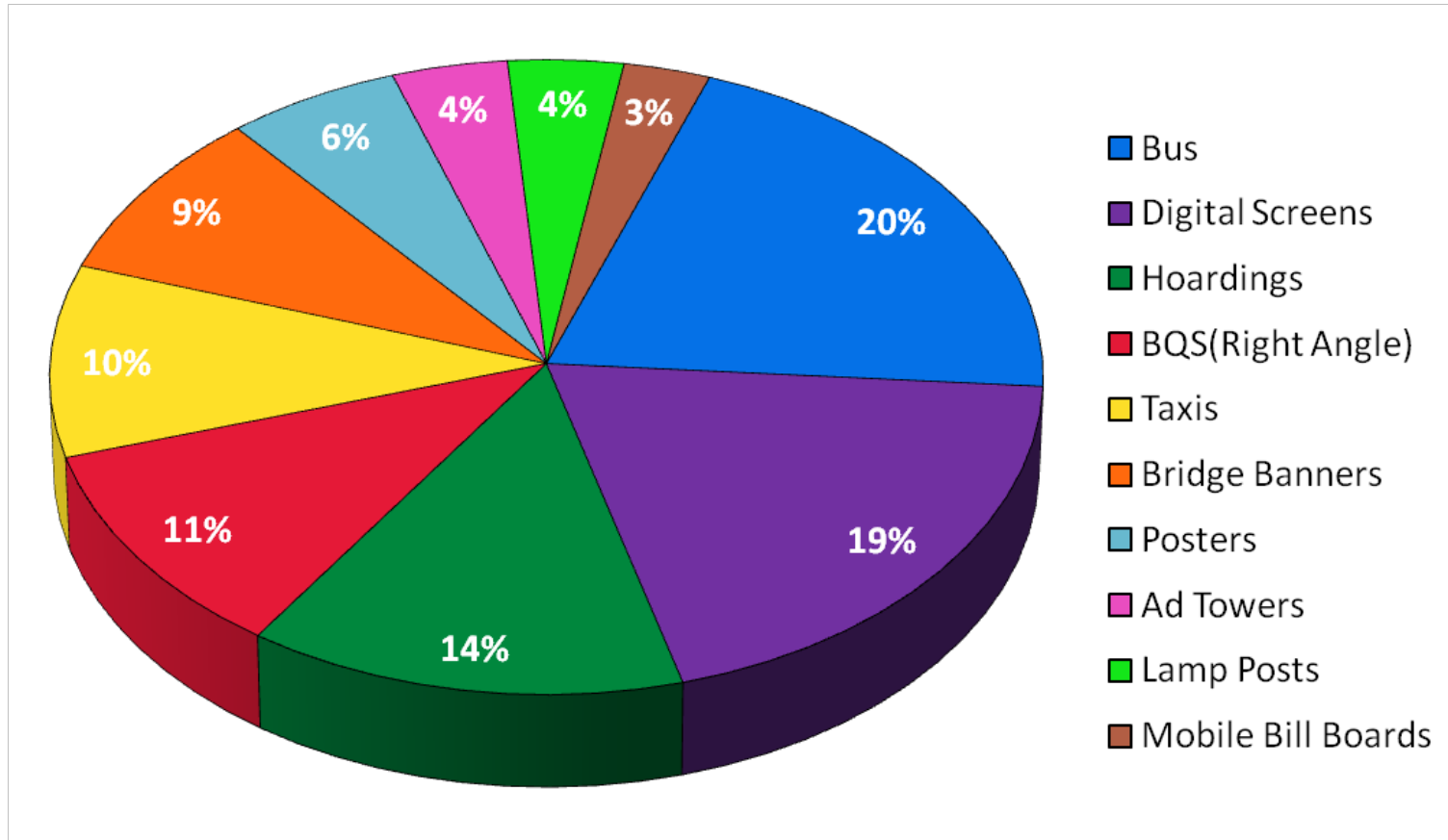
Findings were generated via face-to-face interviews following a fully-structured questionnaire.

- **Study centers** : Dubai
- **Nationality** : All
- **Gender** : Male & Female
- **Age** : 18- 40 yrs

Total	Male	Female	18-25 yrs	26-30 yrs	31-35 yrs	36-40 yrs	Local Arab	Exp.Arab	Asian	Westerners
252	176	76	82	72	52	46	37	60	123	32

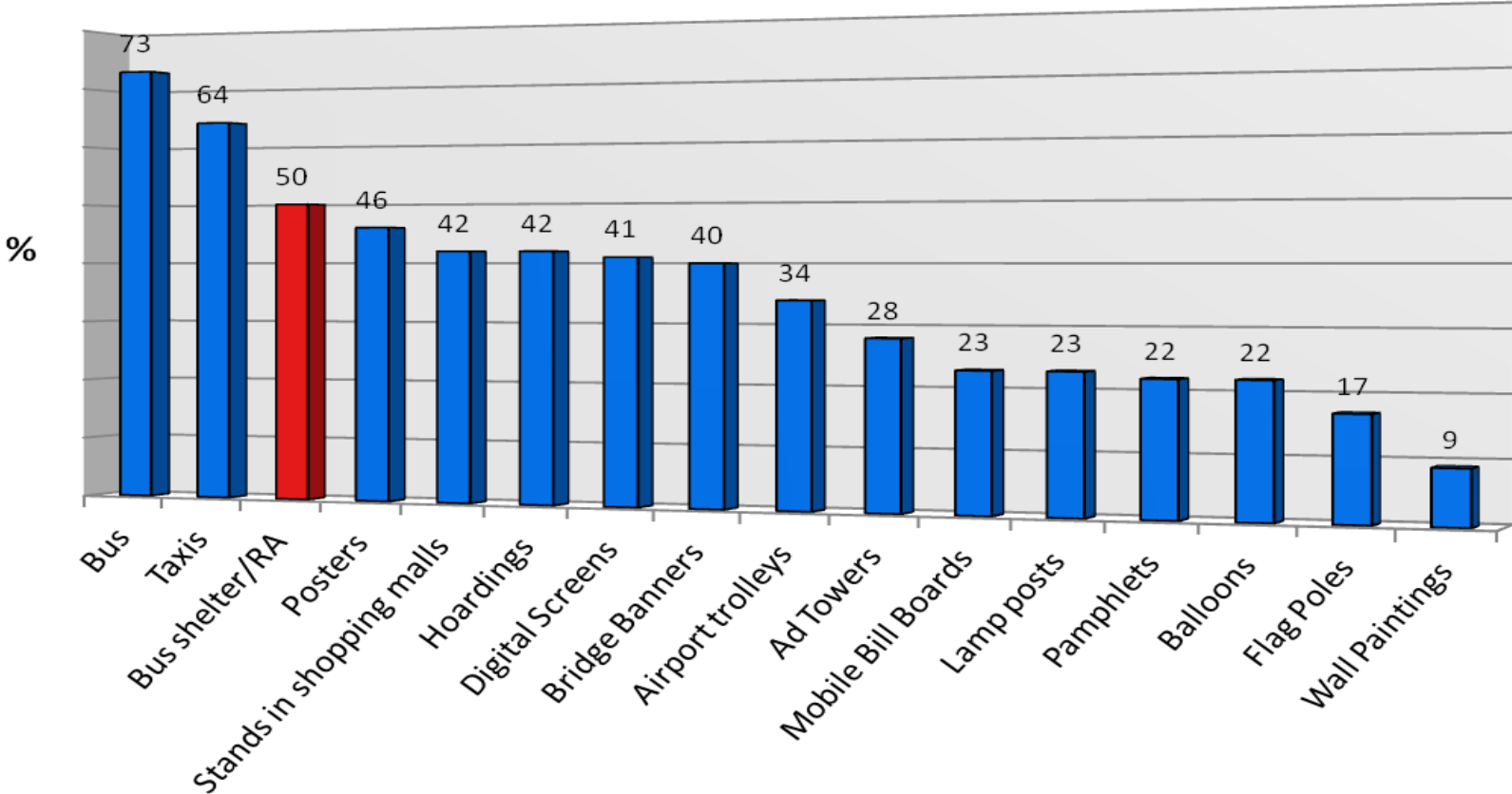
Key Findings

Awareness of OOH advertising media (TOM)



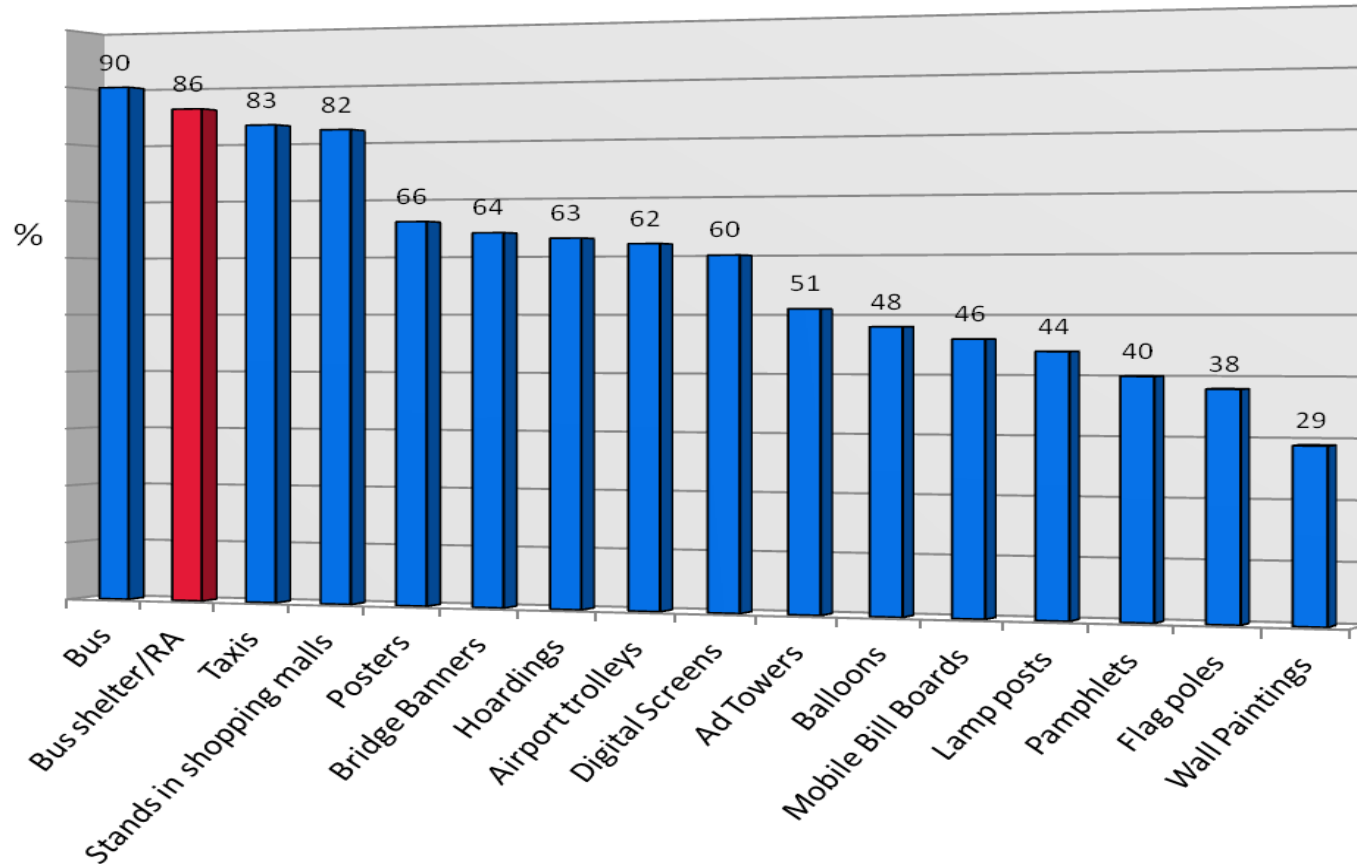
- Four of the top five mediums are campaignable mediums.
- Awareness of Bus Queue Shelters as a medium score remarkably high on less than a years market positioning.

Awareness of OOH advertising media (Total - Unaided)



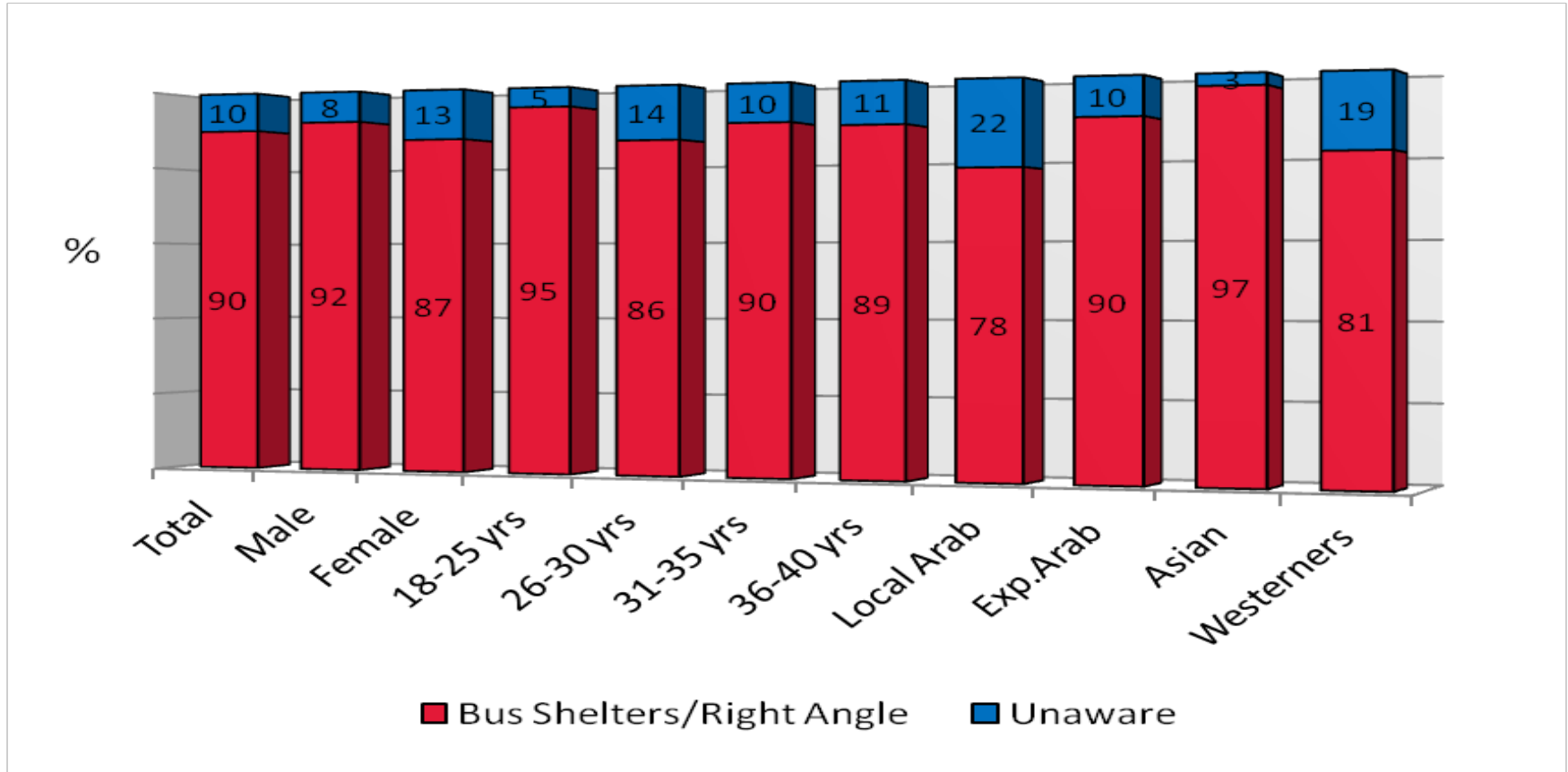
- Ranking third, 50% of respondents are aware of bus shelter media on a spontaneous level.
- Top three mediums are all campaignable.

Awareness of OOH advertising media (Total - Aided)



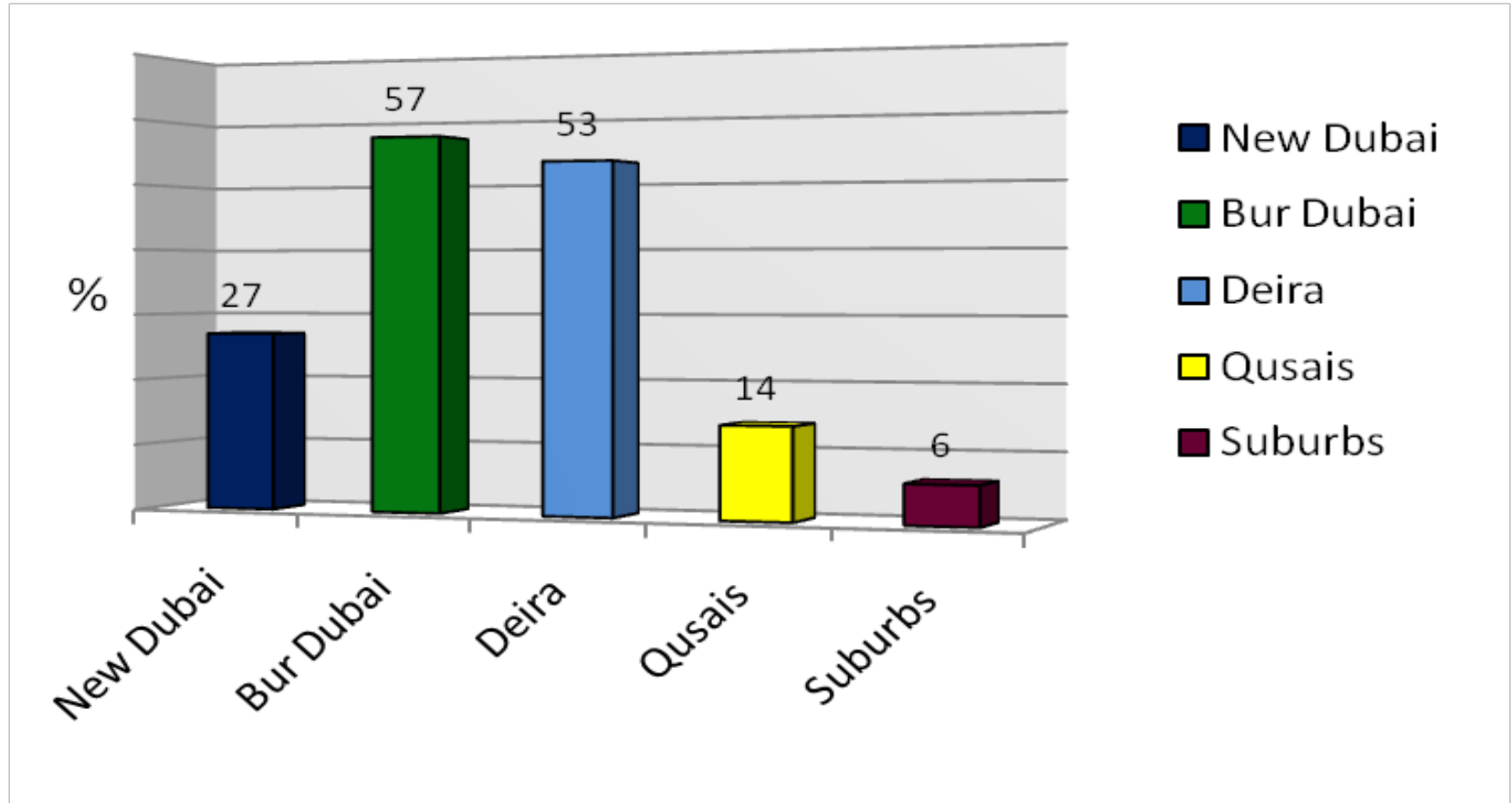
- Respondents show high awareness of diversity of outdoor media with Bus being in the lead followed by Bus Queue Shelters.

Awareness of Right Angle Media after showing visuals



- Overall 90% of respondents were aware of the medium, reflecting that the visibility and location of the medium is very effective.

Locations of BQS Awareness



- Respondents show awareness of BQS in all locations of Dubai.

Perceived effectiveness of Traditional OOH media

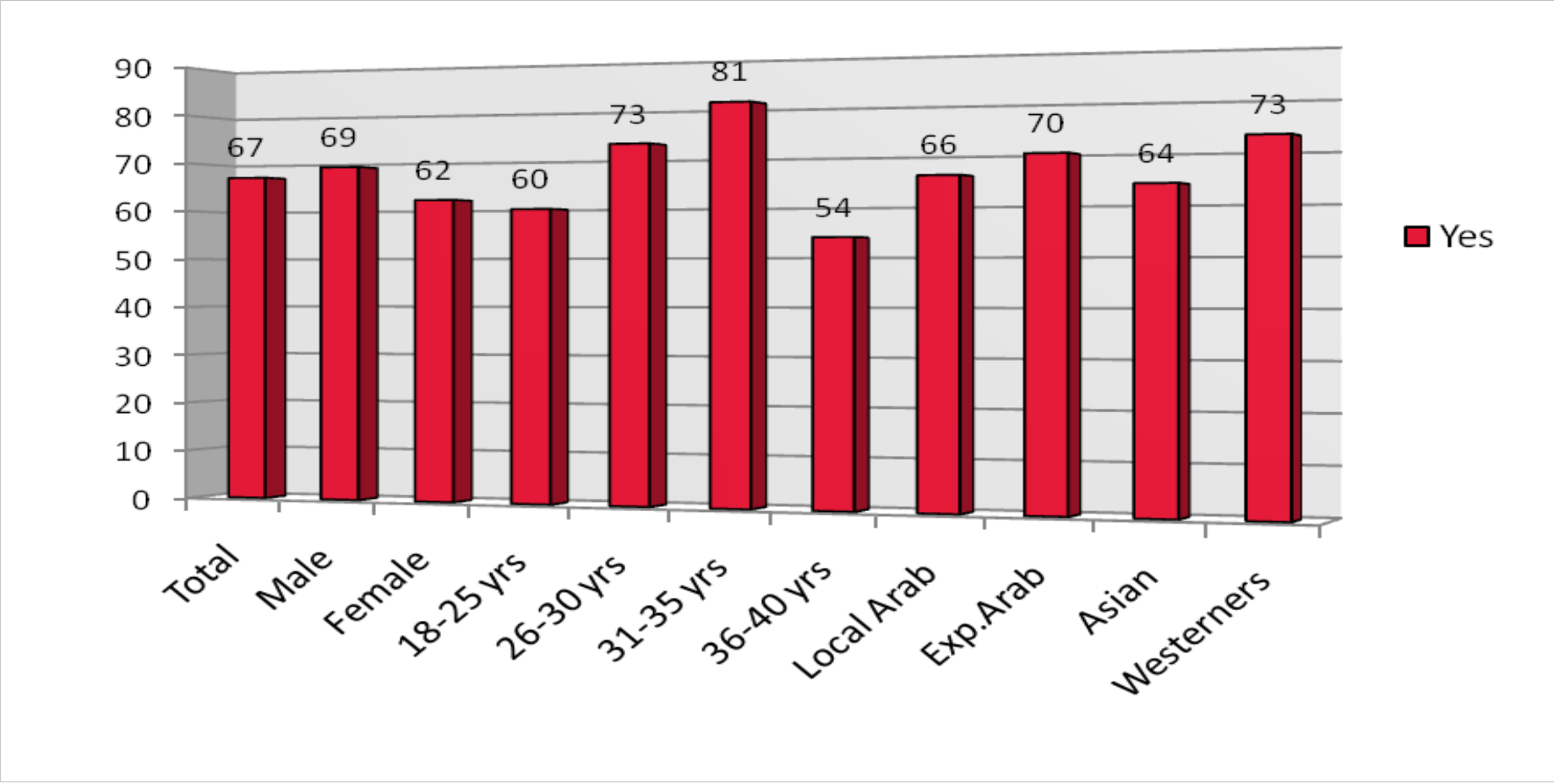


Average	Gender			Age				Nationality			
	Total	Male	Female	18-25 yrs	26-30 yrs	31-35 yrs	36-40 yrs	Local Arab	Exp.Arabs	Asian	Westerners
Hoardings	3.5	3.5	3.3	3.8	3.3	3.5	3.1	2.6	2.4	3.7	4.2
Bus Shelter/ Right Angle	3.3	3.3	3.4	3.3	3.2	3.4	3.7	3	4.4	3.1	3.2
Bridge Banners	3.1	2.8	3.6	1.9	3.2	3.8	3.4	3.5	3.5	2	1.9
Bus	3	3.1	2.7	3	3.3	3	2.5	3.5	3.3	3	2.6
Ad Towers	3	3.1	2.6	3.4	3	2.4	2.9	2.8	3.3	2.9	3.1
Taxis	2.9	3	2.6	2.9	3.1	2.7	2.9	3.3	2.5	3	2.9
Posters	2.9	2.7	3.3	2.7	3	3.3	2.9	2	2.3	3.1	3.3
Lamp posts	2.8	2.8	2.8	3.1	2.6	2.6	3.2	3.7	2.5	2.2	1
Flag Poles	2.8	2.8	2.6	2.3	3.5	2.2	2.9	2.8	2.5	3.4	0
Mobile Bill boards	2.5	2.7	2.3	2.8	2.3	2.8	2.2	1.9	2.1	3	2.4

- Bus Queue Shelters rank second in terms of perceived effectiveness of traditional OOH media, paving its way among many established outdoor media.

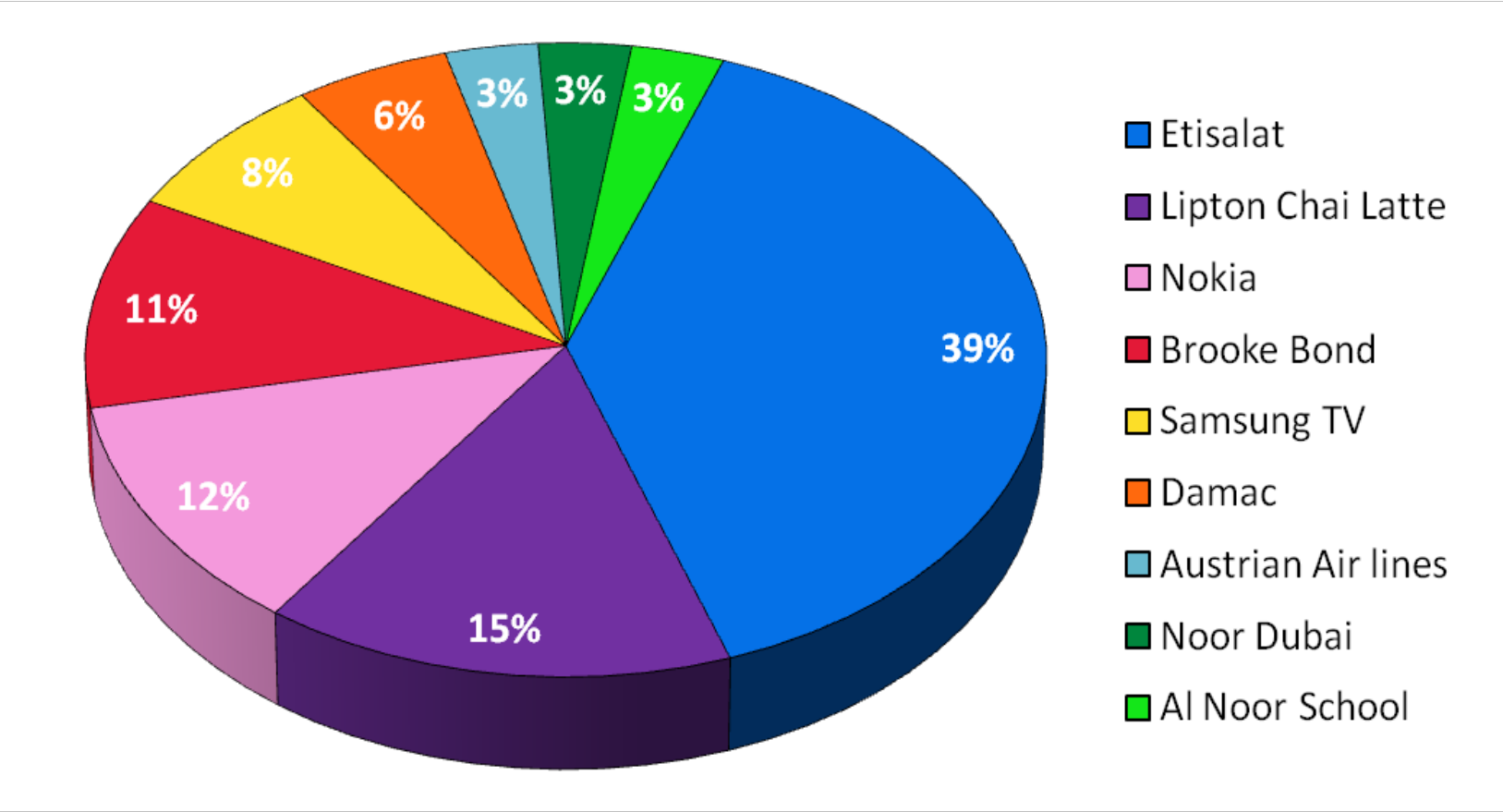
Brand Awareness

Recognition of any brands advertised on BQS



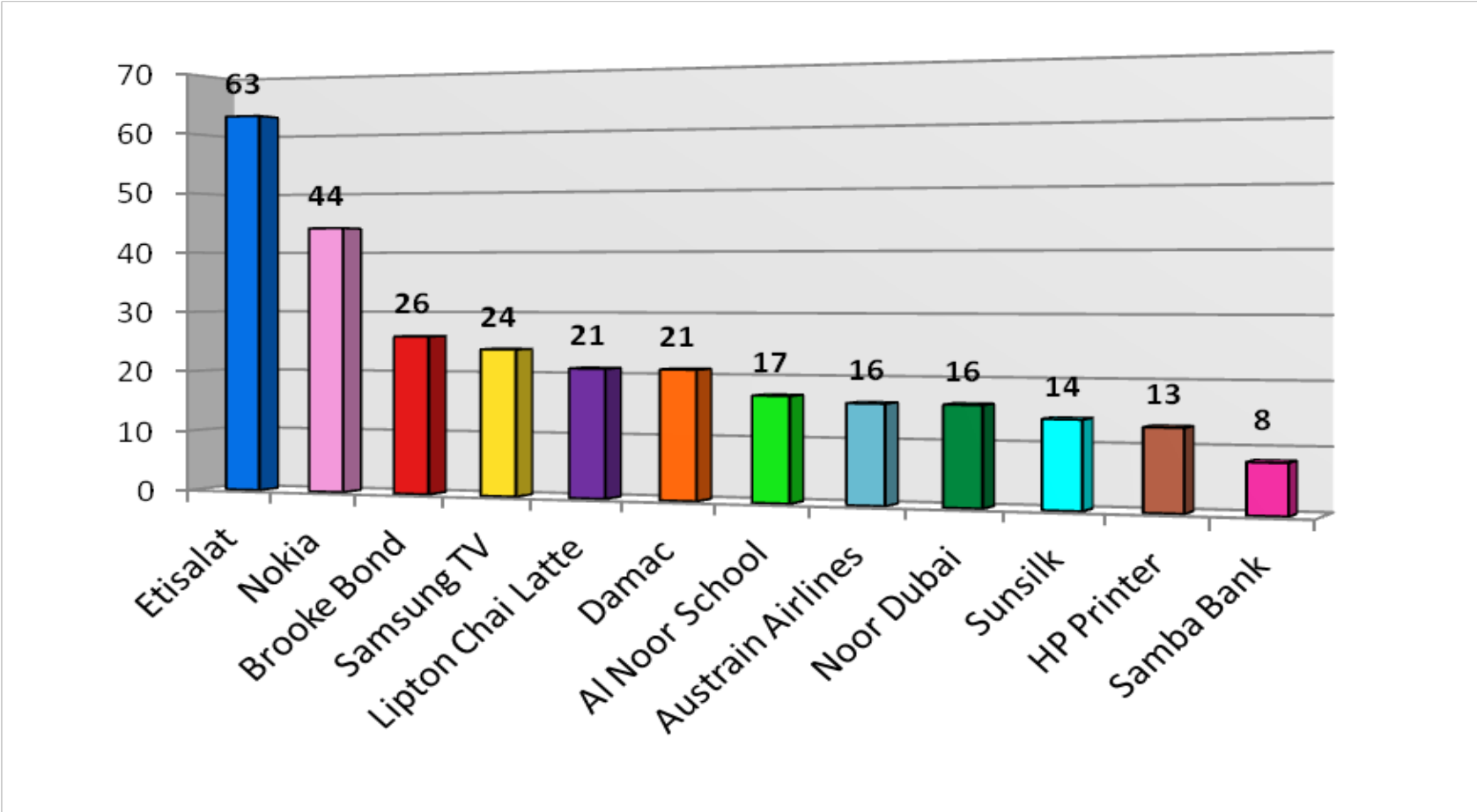
- More than 67% claim that they have seen an ad for a brand on a BQS.
- This is strongest in the younger age groups.

Brands seen on Right Angle media (TOM)



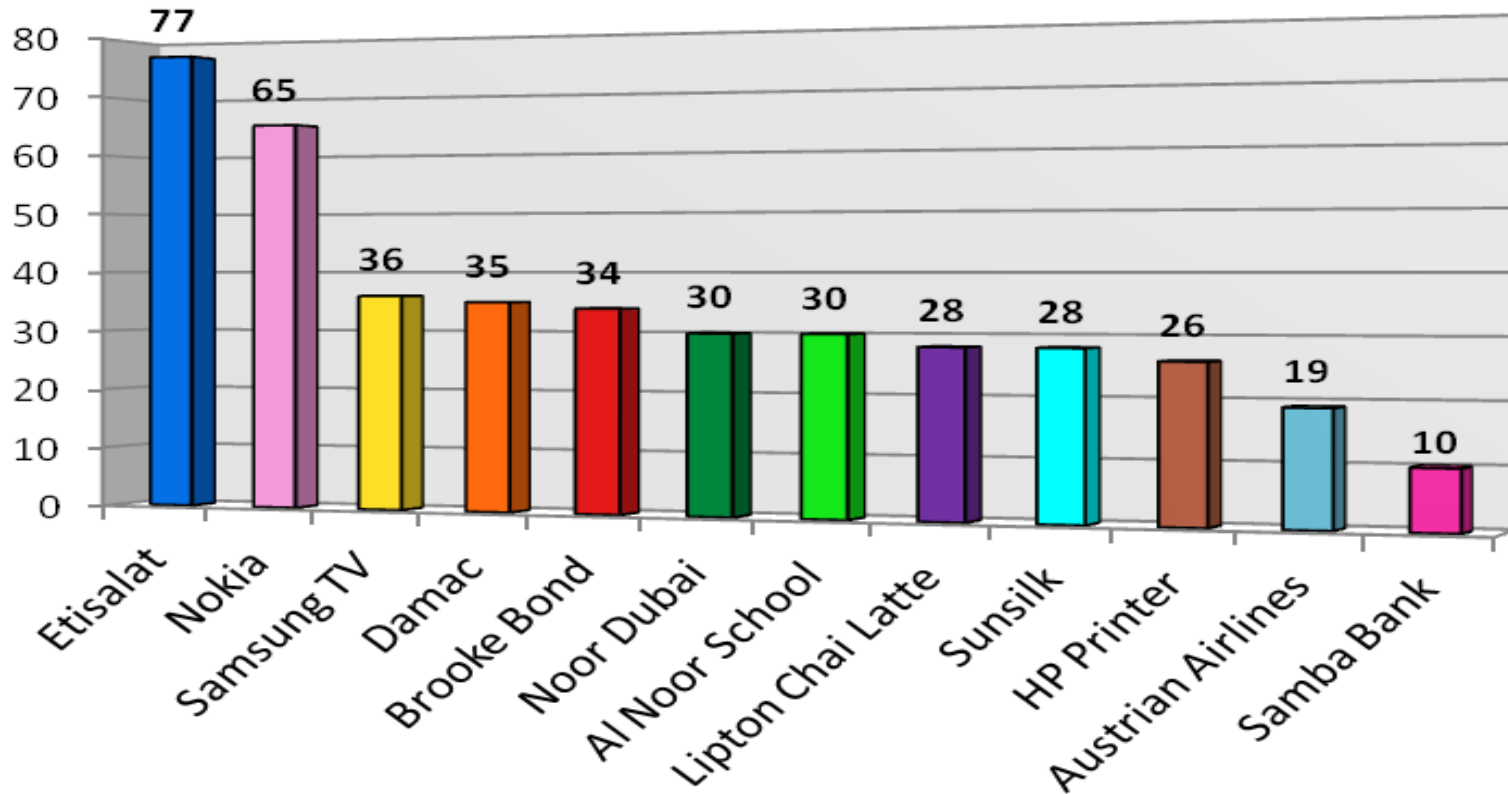
- Etisalat enjoys the highest TOM brand awareness.
- Etisalat had the longest campaign display with 6 months exposure.

Brands seen on BQS (Total - Unaided)



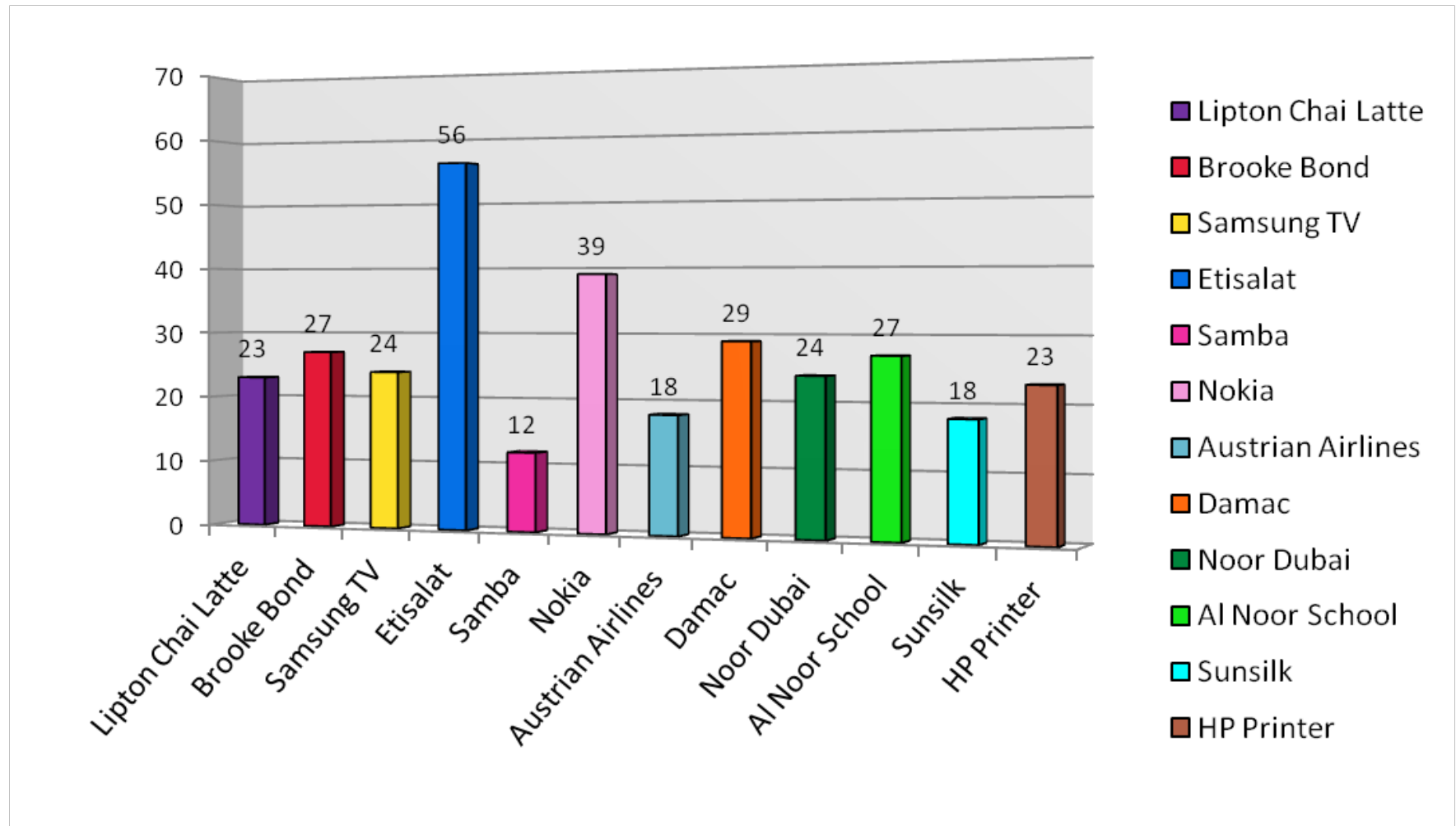
- Respondents could name several brands advertised on the bus shelter.
- Etisalat and Nokia are both multiple-month campaigns and show a cumulative score.
- Further research will establish at what point reach stabilizes.

Brands Seen on Right Angle Media (Total – Aided, Non-visual)



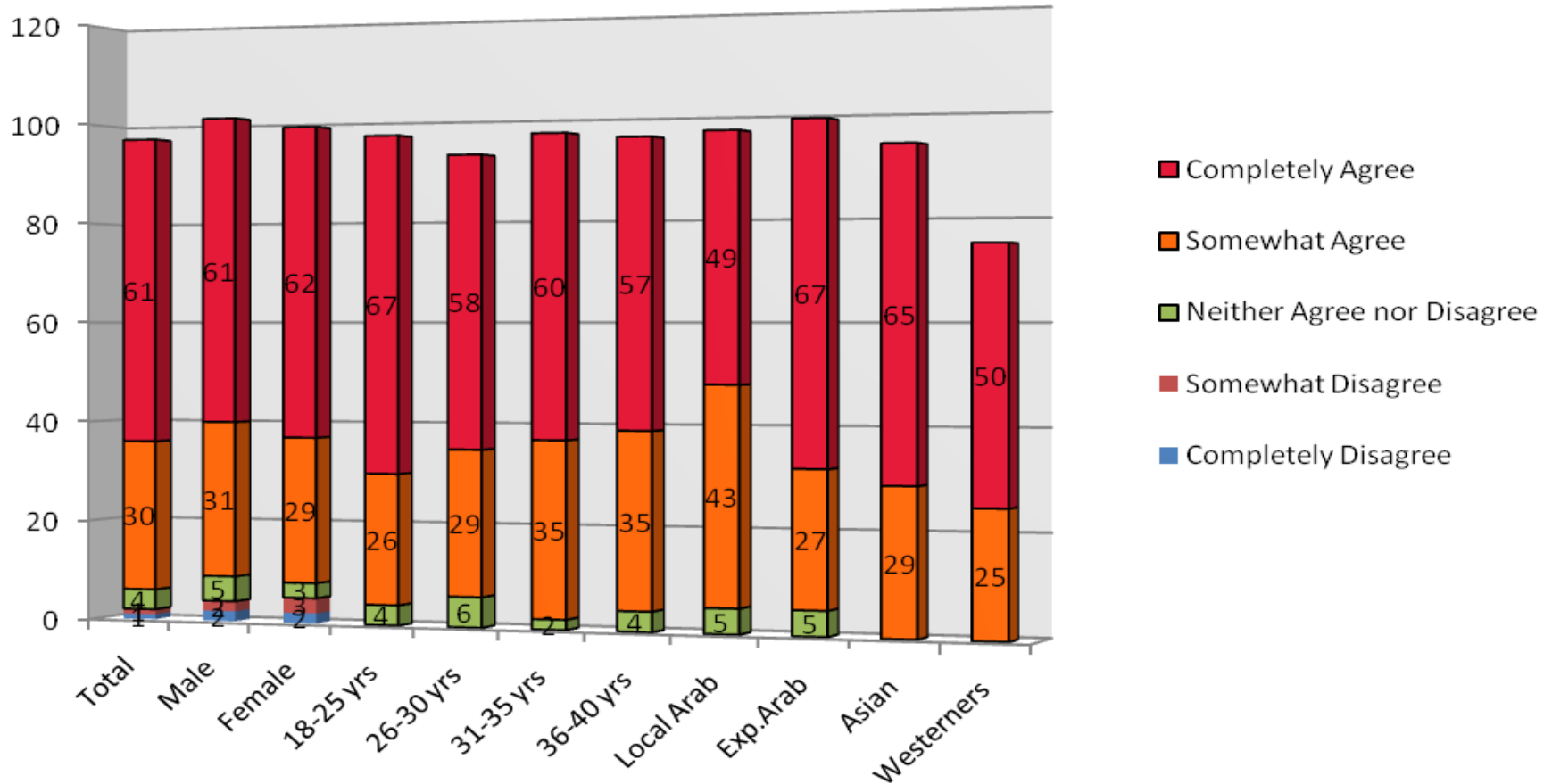
- It is logical to conclude that the medium is effective in generating brand awareness as the above chart shows that respondents were aware of many brands advertised.

Brand Awareness (Total – Aided, Visually)



- Visually aided, the respondents have a lower recall than with spontaneous answers implying that the brand name had an impact on recall.

Agreement level – [Bus Shelters are a good asset for Dubai]



- 91% claim that BQS is good for Dubai.

Conclusion

Right Angle Media's BQS...

- Rank 2nd on an awareness level as a BQS medium.
- Rank 3rd in terms of public perceived effectiveness (PE).
- Traditional OOH offerings have recorded low PE scores and sizeable nationality variations.
- Locations of awareness of the BQS reflect the distribution of the medium.

All in all, ...

- BQS also have a relatively good impact on generating ad awareness for some established brands.
- Excellent awareness scores have been achieved within the first 4 weeks of exposure.
- Are a positive asset for Dubai claim 91% of the respondents.

Thank You