

OOH
MAA

An examination of NZ
Media Performance &
out of homes role

JCDecaux

KISS *oil* GOODBYE.

JOIN THE ELECTRIC REVOLUTION.

Mercury  Energy made Wonderful

BOSTON RD

Grafton 12 ↑
← 1 MWY SOUTH
Hamilton

RAMP
SIGNAL
ON



Recent impacts on Out of Home

Future impacts on Out of Home



Why did we do this?:

One of the key challenges that marketers are always facing is proving the effectiveness of their advertising and the channels they are using.

What was our overarching goal?:

Proving the effectiveness of Out of Home



What did we want to learn?

3 key questions:

1.

How out of home amplifies other media?

2.

How effective campaigns are that use OOH versus those that don't?

3.

How creative impacts campaign effectiveness?

What did we learn?

3 key questions:

1.

The most effective media combination has out of home in it?

2.

Campaigns with more out of home in them tend to give a higher ROI?

3.

Effective creative drives 41% of the potential ROI?



umber
eight
KIWI CAFE

Spark™
LITTLE CAN BE BIG

IS TURBULENCE
REALLY JUST CLOUDS
TICKLING THE PLANE?

International Departures 10:04				Domestic Departures 10:04			
Time	Destination	Carrier	Gate	Time	Destination	Carrier	Gate
10:15	Auckland	QZ	10	10:15	Wellington	QZ	10
10:30	Christchurch	QZ	10	10:30	Dunedin	QZ	10
10:45	Hamilton	QZ	10	10:45	Queenstown	QZ	10
11:00	Palmerston North	QZ	10	11:00	Invercargill	QZ	10
11:15	Timaru	QZ	10	11:15	Bluff	QZ	10
11:30	Christchurch	QZ	10	11:30	Dunedin	QZ	10
11:45	Wellington	QZ	10	11:45	Queenstown	QZ	10
12:00	Auckland	QZ	10	12:00	Hamilton	QZ	10

JCDigital

Spark™

BRING ON THE
QUESTIONS
GENERATION VOICE

AND THE ANSWERS AT SPARK.CO.NZ/VOICE

Emergency Exit

Tuesday
15 October 2019
10:04

JCDigital

Spark™

DO PLANES REALLY FLY
FASTER WHEN I'M
ASLEEP?

International Arrivals 10:04				Domestic Arrivals 10:04			
Time	Origin	Carrier	Gate	Time	Origin	Carrier	Gate
09:30	Auckland	QZ	10	09:30	Wellington	QZ	10
09:45	Christchurch	QZ	10	09:45	Dunedin	QZ	10
10:00	Hamilton	QZ	10	10:00	Queenstown	QZ	10
10:15	Palmerston North	QZ	10	10:15	Invercargill	QZ	10
10:30	Timaru	QZ	10	10:30	Bluff	QZ	10
10:45	Christchurch	QZ	10	10:45	Dunedin	QZ	10
11:00	Wellington	QZ	10	11:00	Queenstown	QZ	10
11:15	Auckland	QZ	10	11:15	Hamilton	QZ	10

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WE'VE WHISTLED
TO PERFECTION

AIR NEW ZEALAND



The data source:



- 21 Years of experience
- 12 Global offices
- 90% Client retention
- Privately-held:
No investors to satisfy
- Unbiased perspective
- Analytics consultants
- Many data partnerships:
Facebook, Google, Pinterest, Instagram & Snapchat



Overall Methodology for Aotearoa:

- The work is drawn from 50+ studies from 2017
- In excess of 1bn of media spend
- While the number of brands in each study is not released to keep competitive information confidential - the industries cover CPG, Finance, Restaurants, Retail & Auto.



What is Marketing Mix Modelling?

Marketing Mix is a mathematical model to work out what is driving your sales.

We measure price, economic conditions, competitors, weather etc and then have a deep dive into marketing activity.

As you run more or less marketing, we measure the impact on sales- if we can see a statistically significant relationship then we can assign those sales to that specific activity- otherwise it remains in the large 'base' section in red to the left.

So as you do more TV, do we see sales go up?
As you do less, do we see sales go back down? It's that relationship between the amount of TV run and the amount of sales increase that our models are based on.



What is Commercial Mix Modelling (CMM)?

Commercial Mix Modelling allows us to disaggregate and measure how different elements of and executions within your marketing mix drive sales

It is a holistic model that includes non-marketing drivers and macro-market factors to ensure that you get an accurate understanding of how marketing fits as an incremental driver vs other drivers of sales

It goes deeper than a traditional media / marketing mix model by:

- Allowing you to measure differences of different dimensions within the model
- Enabling you to optimise future campaign planning at a greater level of granularity



Analytic Partners'
ROI Genome™
Insights to inform:

- Hundreds of billions in marketing spend measured
- More than 2 million marketing metrics
- Global footprint covering 45+ countries
- 700+ brands and over \$470 billion spend
- In excess of \$1bn marketing spend in NZ
- Cross-section of industries and marketing tactics
- In depth understanding of how marketing works
 - Halo principles
 - Synergies and cascading impacts
 - Modelling considerations



The results

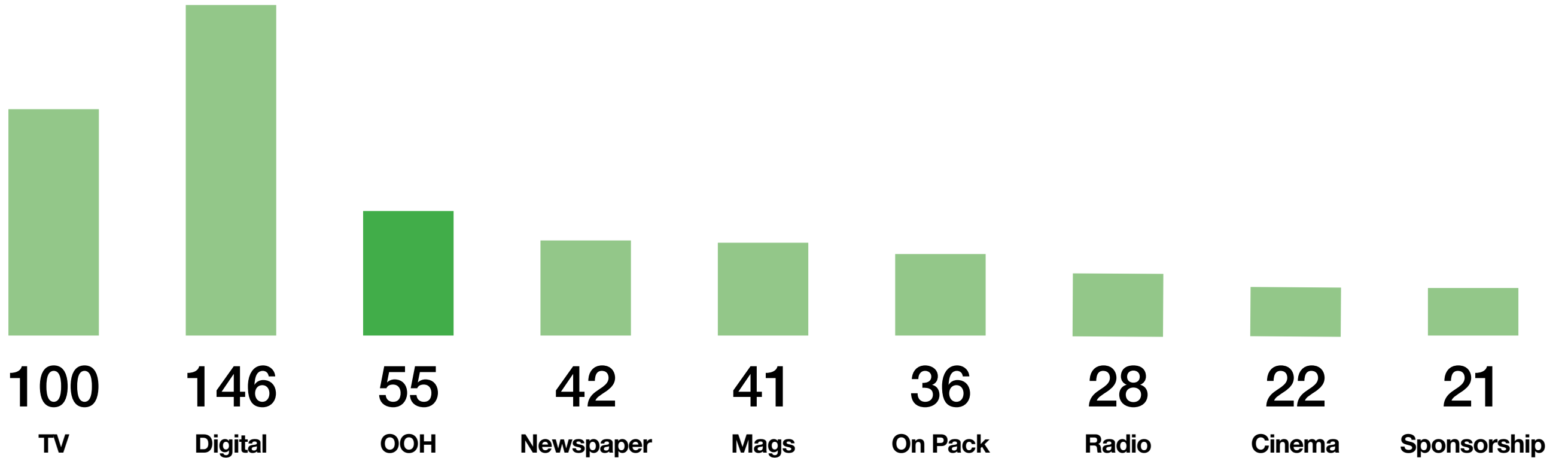


How Out of Home amplifies other media

In isolation Out of Home delivers third strongest ROI

Analytic Partners: ROI short term performance by channel indexed to TV (100) New Zealand

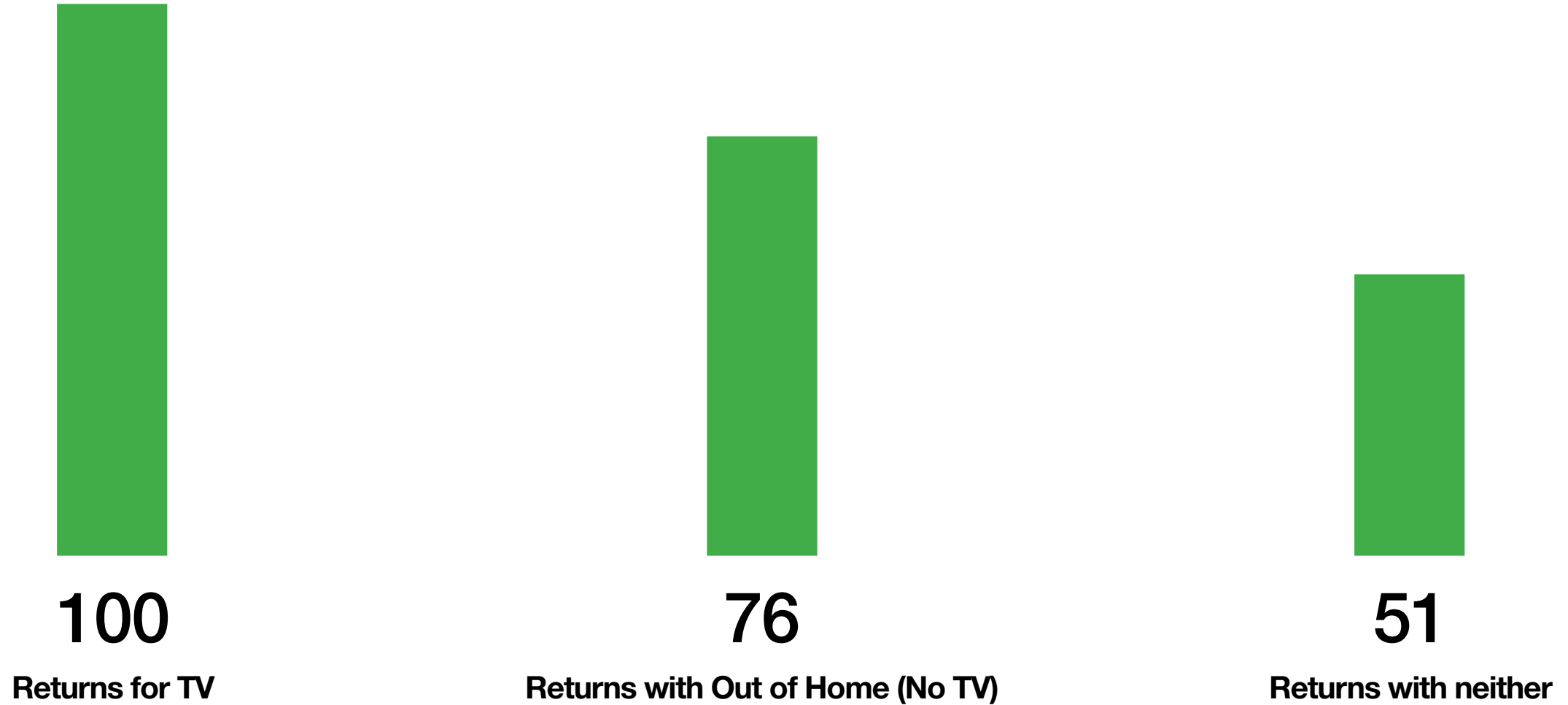
Source: Analytic Partners Meta Analysis, New Zealand, 2015-21



Out of Home ensures digital performs

Analytic Partners: ROI index of digital campaigns with or without offline support, New Zealand

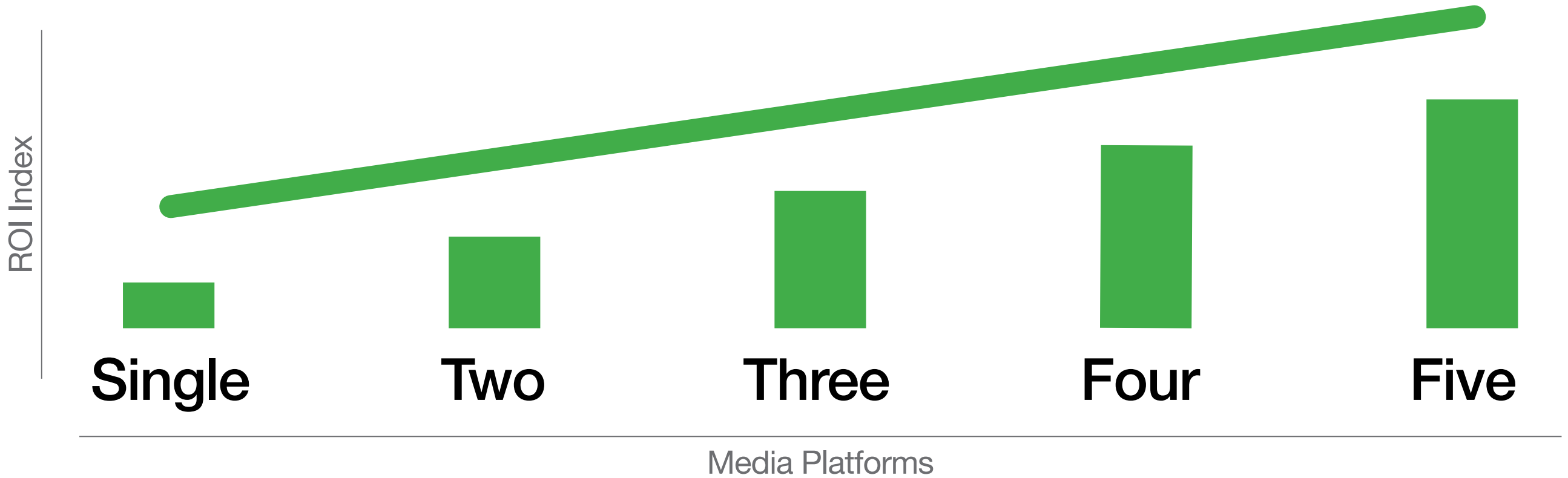
Source: Analytic Partners Meta Analysis, New Zealand, 2015-21



More channels = greater ROI (Mark Ritson's favourite chart)

Multimedia campaigns tend to have a higher ROI than single media campaigns

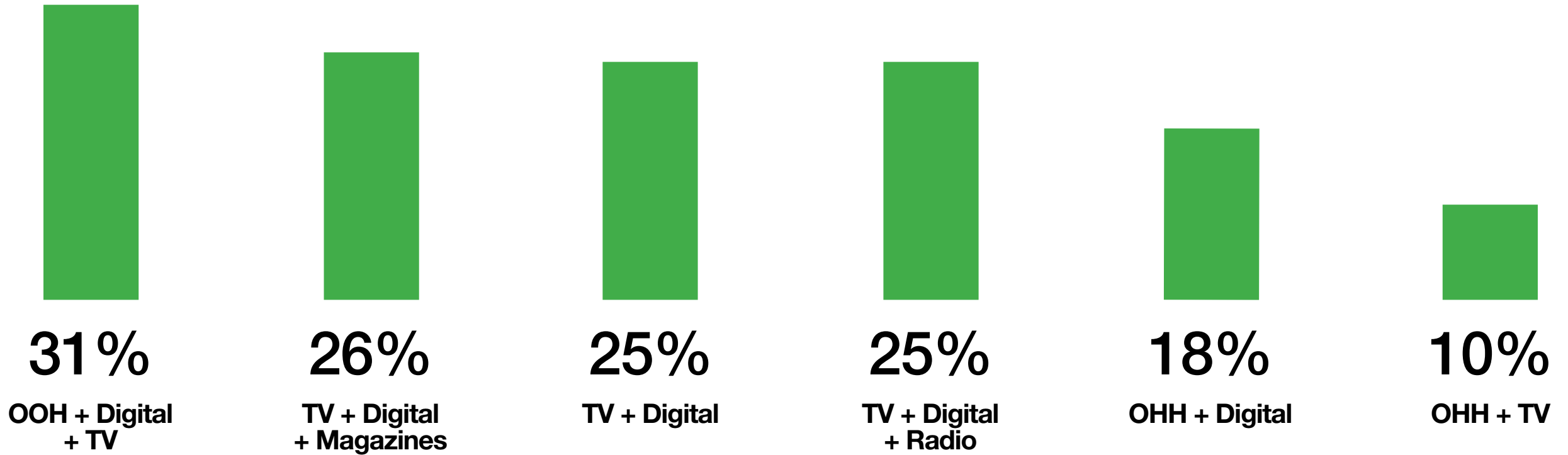
Source: Analytic Partners ROI Genome, Global, 2010-2017



The best media combination includes Out Of Home

Analytic Partners: Increase in campaign ROI from media channel combinations, New Zealand

Source: Analytic Partners Meta Analysis, New Zealand, 2015-21





Effectiveness

How effective are campaigns that use Out of Home versus those that do not...



worldooh.org/oursecondchance oh!
Nick Meek @ Siobhan Squire

— IN 2021 —
CAN THE HIMALAYAS
STILL BE VISIBLE
FROM ANY?
#OURSECONDCHANCE



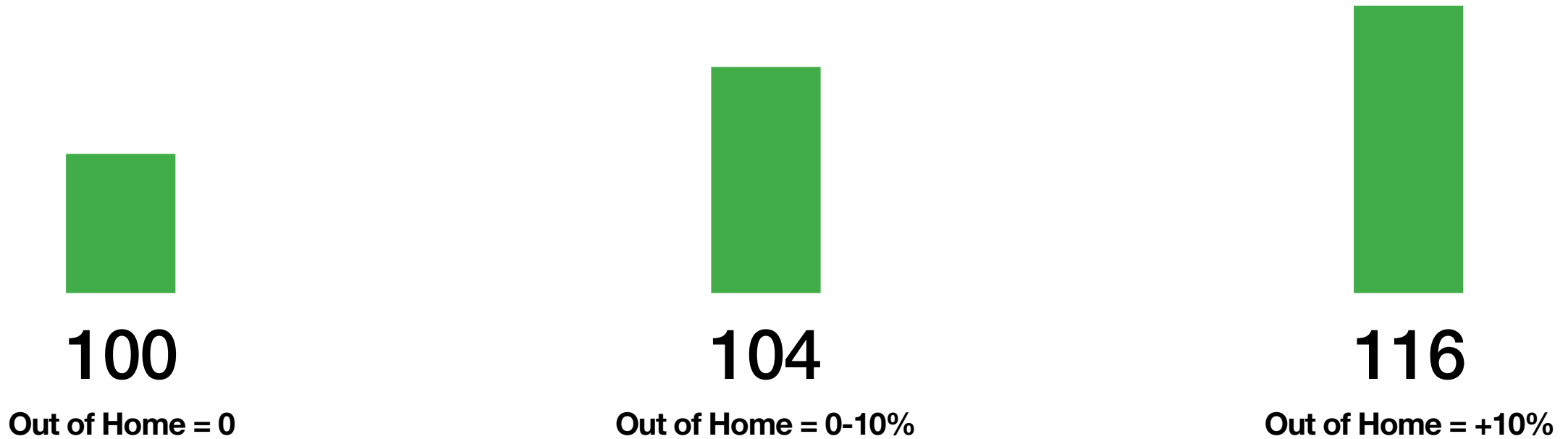
Budget



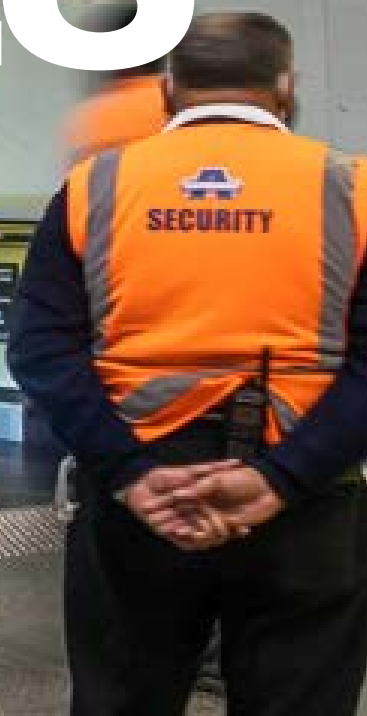
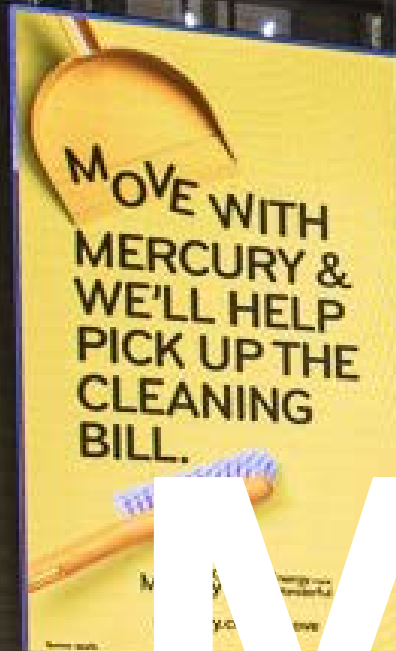
Campaigns with more Out of Home deliver higher ROI

Analytic Partners: ROI performance index of campaigns with Out Of Home vs None, New Zealand

Source: Analytic Partners Meta Analysis, New Zealand, 2015-21



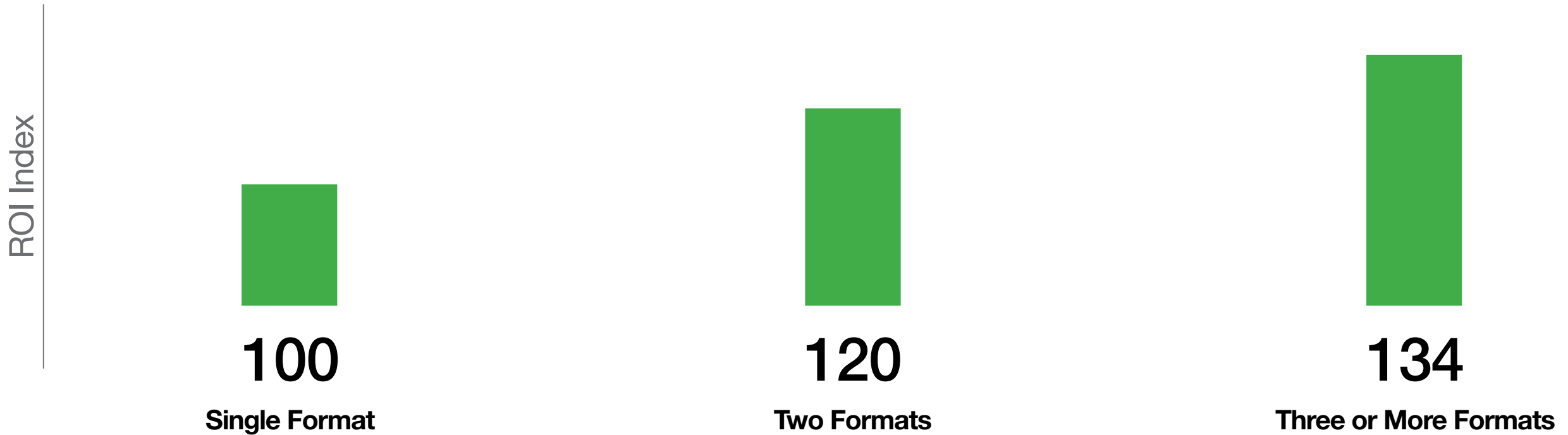
More Formats



Use more formats to achieve higher the ROI

Analytic Partners: ROI strategy comparison within Out Of Home New Zealand

Source: Analytic Partners Meta Analysis, New Zealand, 2015-21





STAN SMITH,
FOREVER

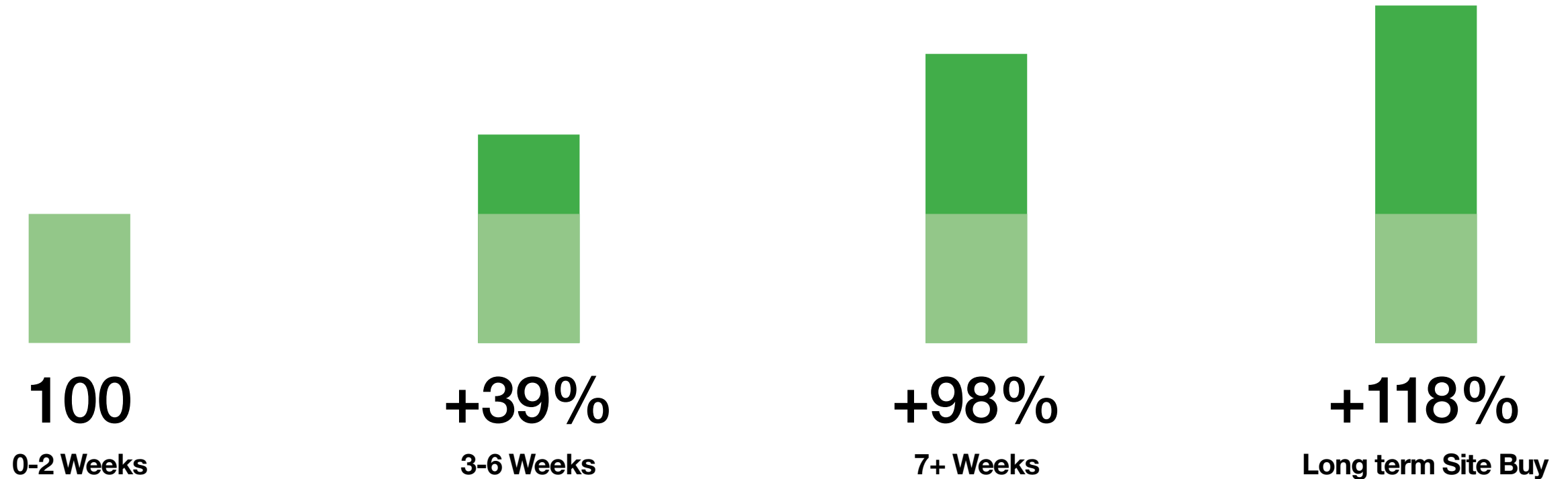


Length

The longer the campaign the higher the ROI

Analytic Partners: Out of Home ROI by Campaign Length Indexed to 2 Week Campaign New Zealand

Source: Analytic Partners Meta Analysis, New Zealand, 2015-21



Quality

The background features a horizontal color gradient starting with red on the left, transitioning through purple, blue, and green, and ending with yellow on the right. A halftone dot pattern is overlaid on the entire background, with the dots being larger and more prominent in the red and purple areas, and smaller and more sparse in the yellow area.

How creative quality impacts campaign effectiveness...

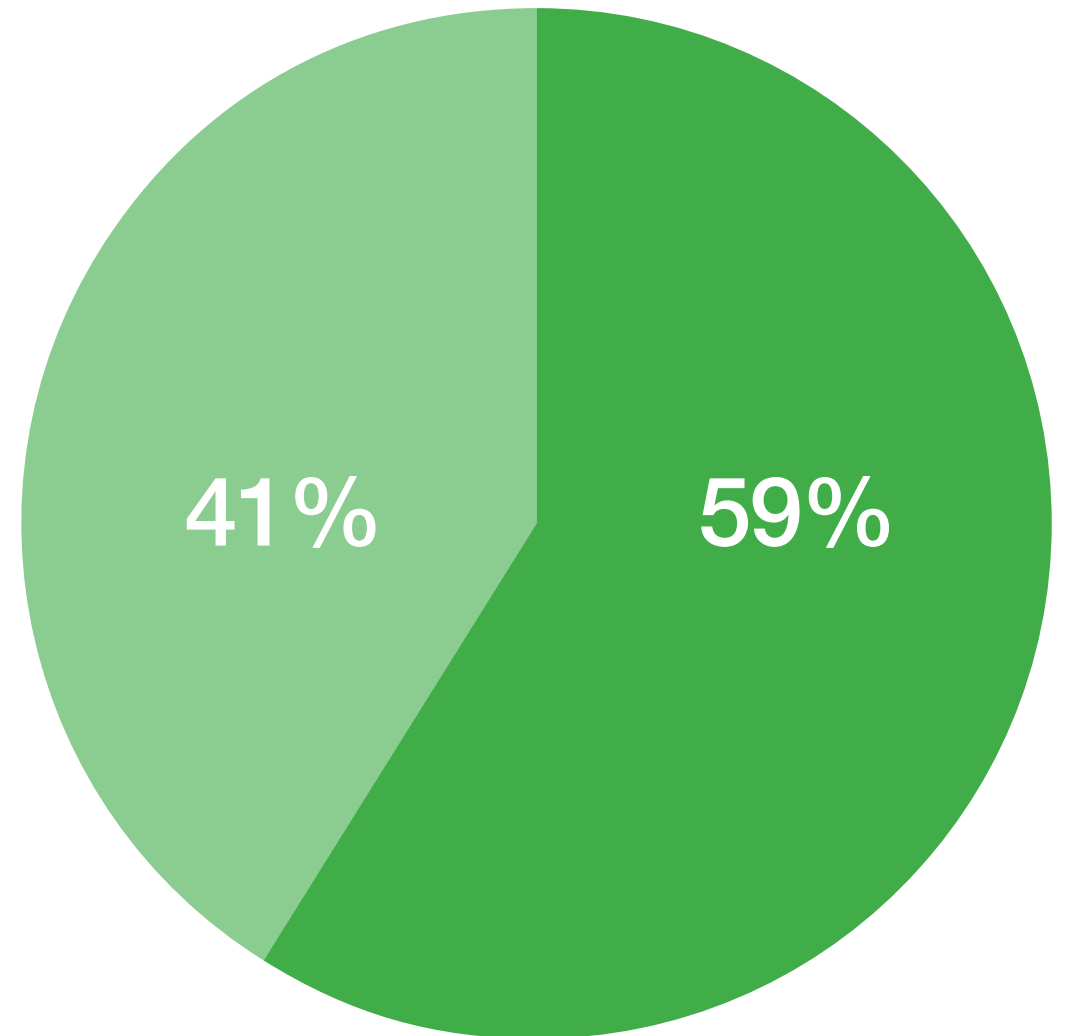


Creative designed specifically for out of home over performs:

Executional Elements 59%
Format, Weeks in Market, Location

Copy Quality/Creative 41%
Content, Communication, Engagement

Source: Analytic Partners: Copy Quality Contribution for Out of Home Media

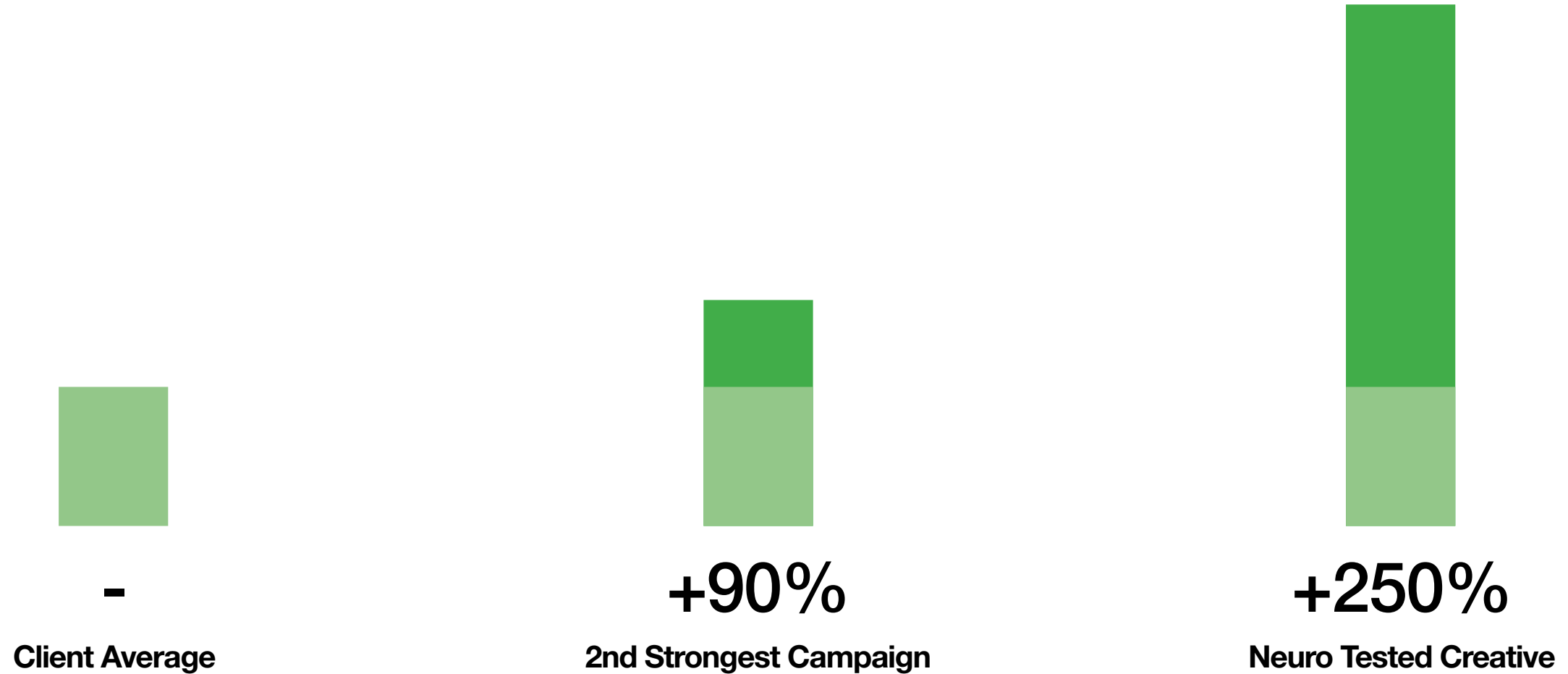


High Impact



Copy quality has the same impact as it does in other marketing channels: Analytic Partners: Case Study Australia – ROI impact of increased copy quality

Source: Analytic Partners Australia Case Study





Key take outs

1.
Out of Home + TV + Digital = strongest media combination
2.
Creative specific to Out of Home delivers higher ROI
3.
ROI increases the longer a campaign goes for
4.
Campaigns with more out of home have a higher ROI
5.
More out of home formats = increase in ROI



What does this mean for advertisers?

There are 4 easy steps advertisers could take to have more effective out of home campaigns

1. Have creative specific to the formats
2. Use at least 3 different Out of Home formats in each campaign
3. Assign at least 10% of budget to Out of Home
4. Run out of home campaigns for min of 8 weeks to get the highest ROI



Q&A

Appendix

Industry recognition:



Leader in the Forrester Wave: Marketing measurement and optimization solutions, Q1 2020.

Only Leader in Forrester Wave: Marketing measurement and optimization, Asia Pacific Q4 2018.



Recognized for marketing mix and attribution in market guide.

Recognized for building segments and personas for digital marketing.



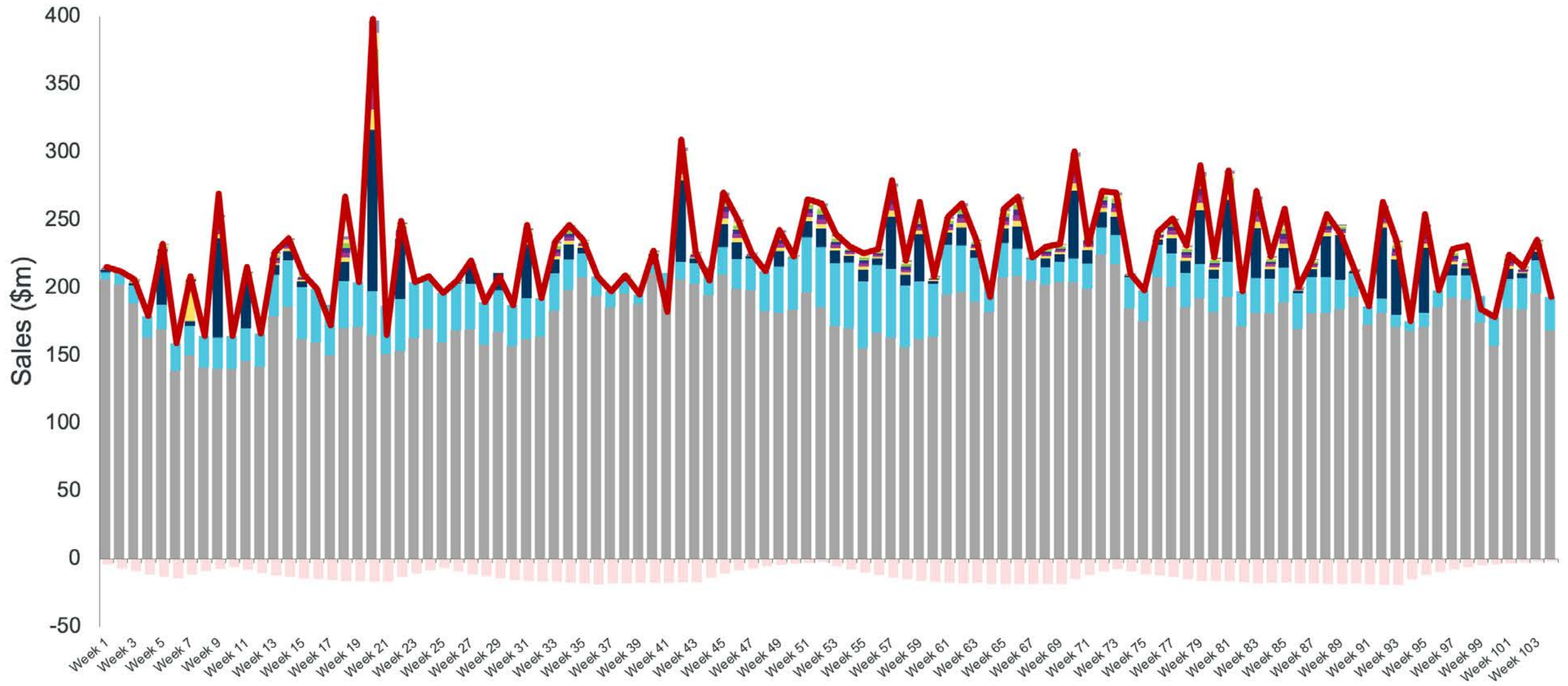
2019 Smart Data Agency of the Year: For leveraging value from data to help clients achieve competitive advantage.

2019 Winner of Carrefour & Google Challenge Hackathon



2018 Genius Award for Data & Analytics Storytelling: Awarded to Scotts Miracle-Gro for their use of Analytic Partners' Helio solution.





Q&A



Thank you

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Media Association
Aotearoa

oohmaa.co.nz