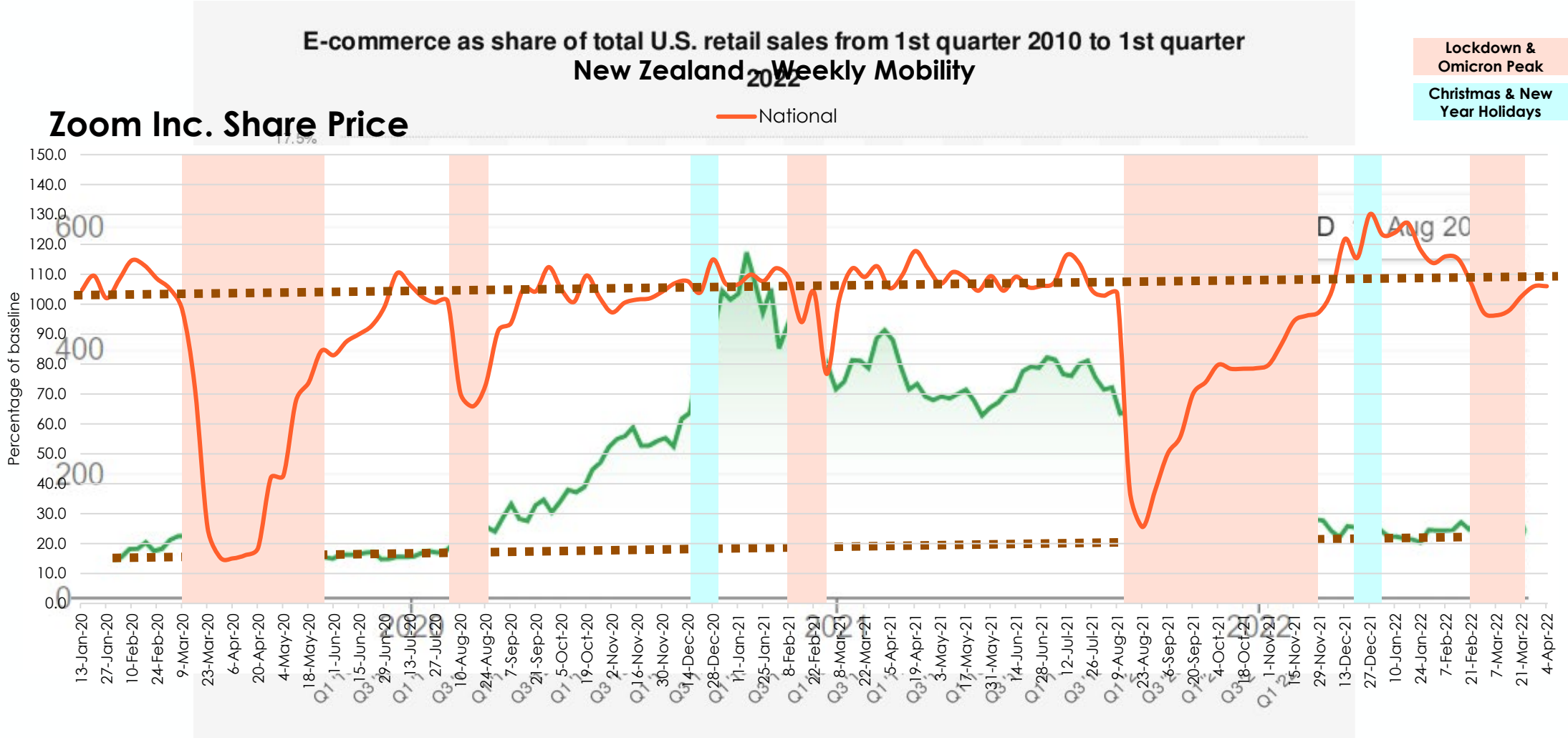
# Roadshow Q4 2022
# #1 Consumer movement in a Post-Lockdown NZ

## What's changed and what hasn't?

# The COVID impact on Audience Mobility

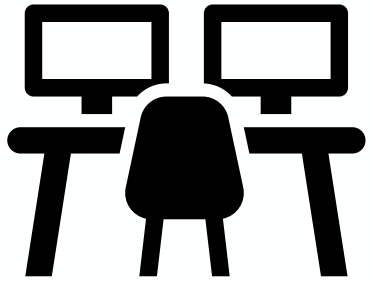
We're largely where we would have been if it had never happened




Source: Apple Mobility Data (Driving), data from 13th January 2020 up to 10th April 2022

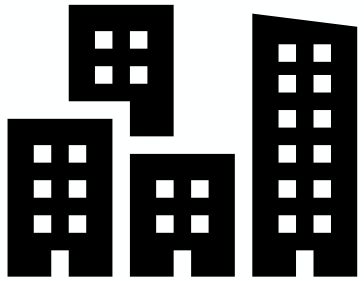
# So, what has changed?

COVID has altered some key consumer behaviours that have an impact on OOH

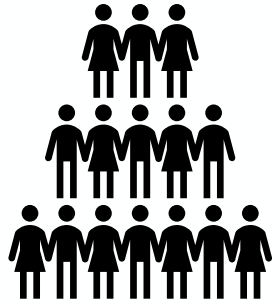


**Hybrid Working** has become the norm for those that can

This has impacted the types of trips that consumers are taking, with **slightly less frequent trips for work**



Ultimately leading to **CBD Audiences recovering slower** than suburban audiences



The data shows that overall **audiences are back to normal,** but we are travelling slightly differently

**ACTIONABLE TAKEAWAY**

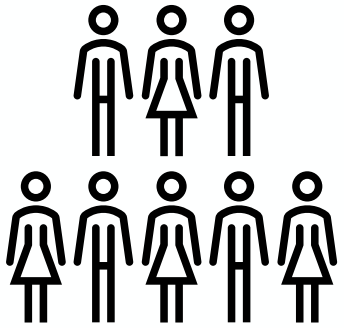
Continue to spread asset usage across both CBDs and Suburbs to maximise reach



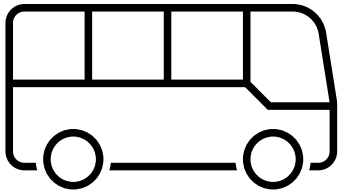
Source: WARC, Consumers Trends report, oOh!media & LandmarksID mobility data, TomTom congestion Insights

# Continuation of long-term consumer trends

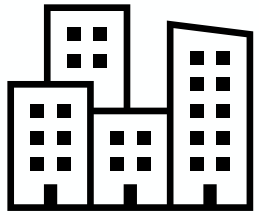
What will have a noticeable impact on mobility in the future…



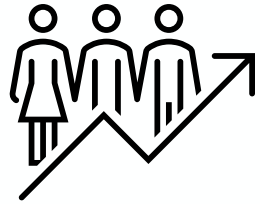
**Increasing population growth & Urban sprawl** will continue to drive congestion



Ongoing development of **public transport infrastructure** initiatives



**Urban development** will drive greater population densification



**Increasing usage of public transport** infrastructure driven by intensification

**ACTIONABLE TAKEAWAY**

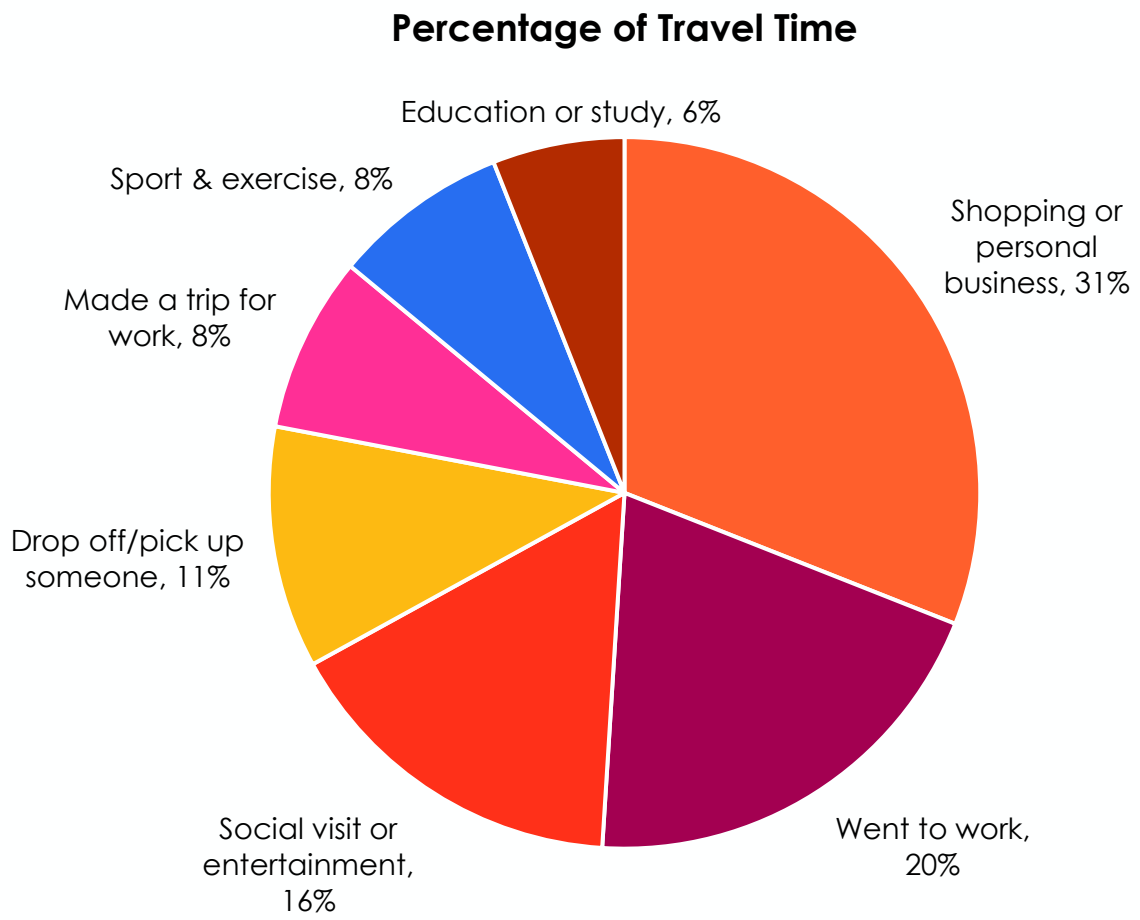
Plan to higher congestion & public transport routes to maximise audience reach

4. Source: Stuff: urban sprawl projected to eat up some of Auckland's most productive land,

# People travel for a wide variety of reasons

Don't just plan around the work commute

**The data highlights that most trips Kiwis make are non-seasonal. Things like shopping, working, social visits and education are made year round. Therefore, we can say that seasonality has a very small impact on OOH media consumption.**




5. Source: New Zealand Ministry of Transport, Household Travel Study, June 2021

# oOh! Insights Update

*January 2023*

# Key insights included in this document

oOh! Reach & Contacts have returned to baseline post-New Years much quicker than they have historically

Auckland, Christchurch, Wellington and the National average are all sitting above baseline for Reach and Contacts as of wc 9th January

A much different story to that of 2021/22 which saw Auckland, Wellington and the National average still sitting below baseline heading into February

This is likely driven by the dreadful weather seen across the country that cancelled holiday plans for many Kiwis

What it does mean though is that people are back home, and advertisers will need to return to market sooner rather than later to re-capture their attention and ensure they are top of mind

**Whilst everyone ventured out of the main centres for the holidays, as is normal, data shows they returned home earlier than normal this year**

# And this is likely driven by the awful weather seen across the country, cancelling festivals, camping plans and other summer getaways

**Weather: Summer Haze festival cancelled, campgrounds deserted**

9:45 pm on 3 January 2023

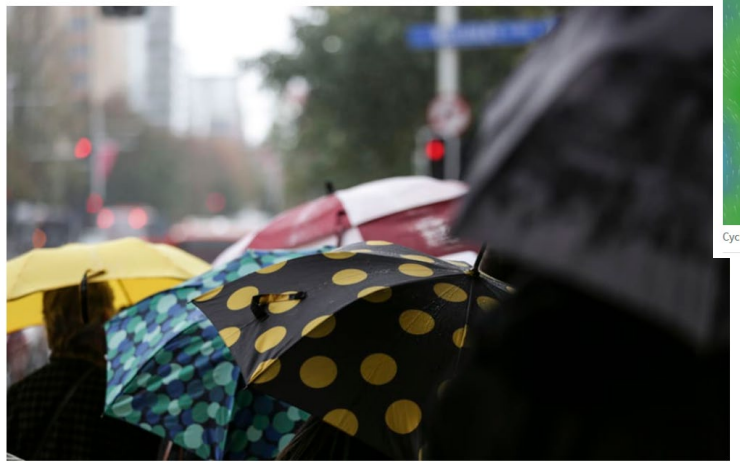
Share this

Krystal Gibbens, Reporter
krystal.gibbens@rnz.co.nz

**New heavy rain warnings for Coromandel, BOP, top of South Island, Westland**

9:35 pm on 5 January 2023

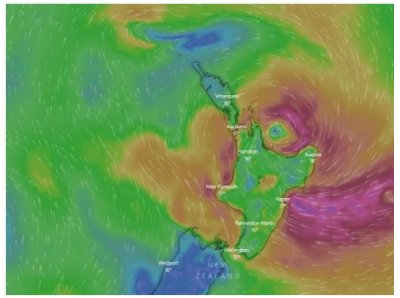
Share this



**Weather: Cyclone Hale, first tropical cyclone of 2023, expected to hit North Island early this week**

By Benjamin Plummer
8 Jan, 2023 08:10 PM · 6 mins to read

Save | Share



Cyclone Hale's predicted position off the North Island on Wednesday morning. Ph

NEW ZEALAND

**The Front Page: Summer of rain - Why has the weather been so bad?**

By Damien Venuto
16 Jan, 2023 05:00 AM · 2 mins to read

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New Zealand has been hit with a swarm of wild weather over the New Year period.

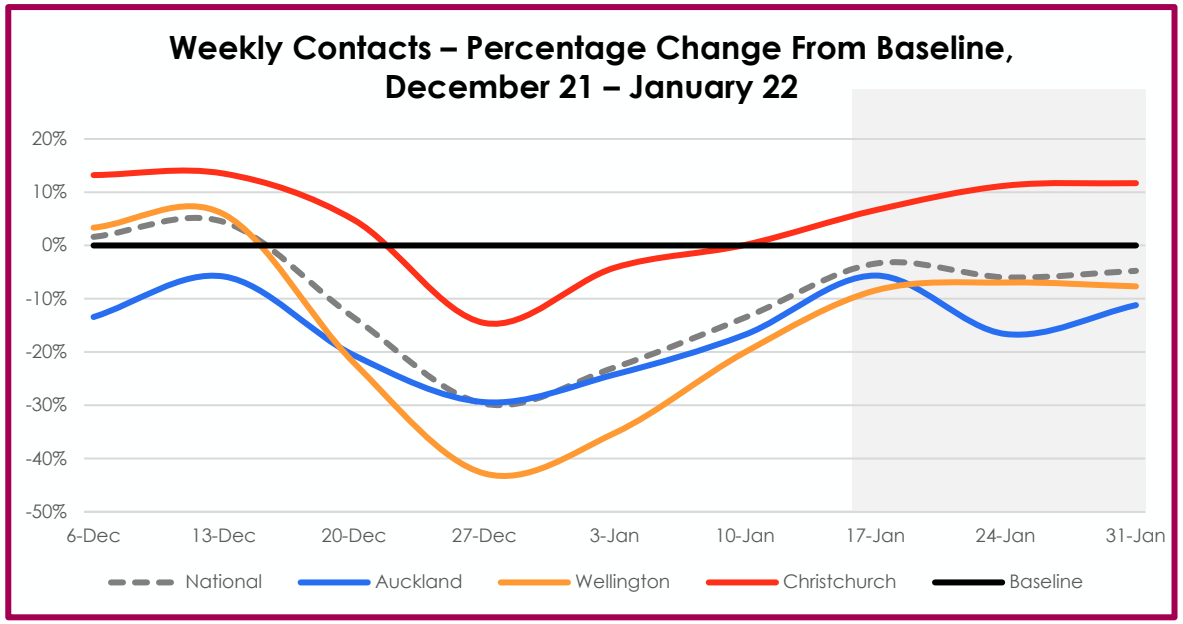


ooh! unmissable

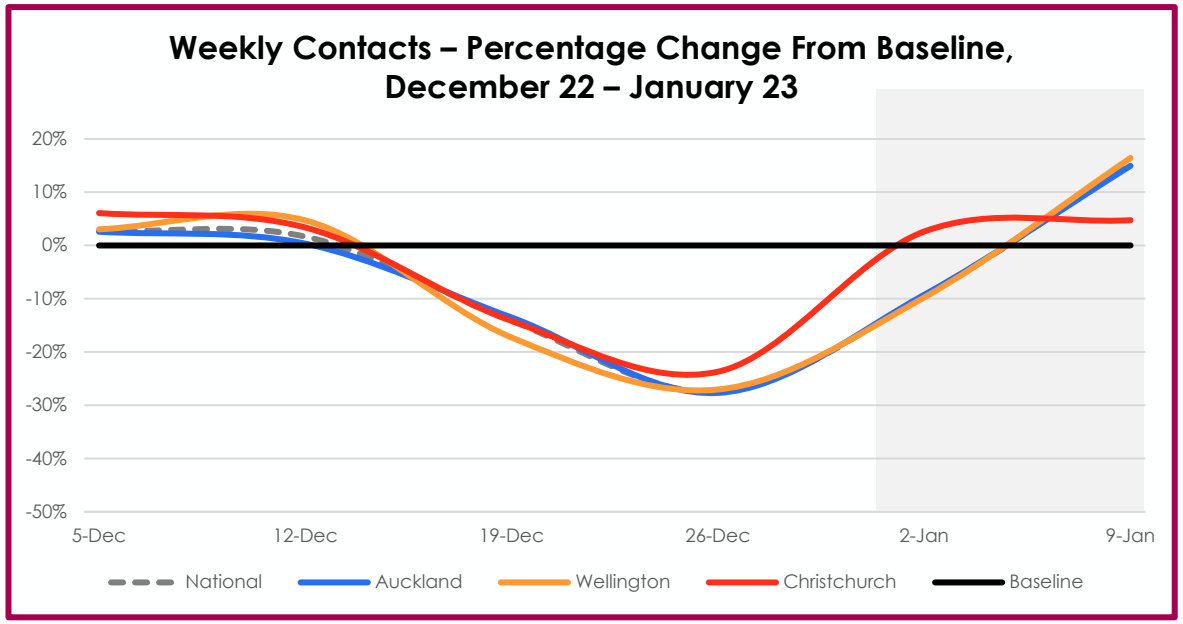
# oOh! Contacts have returned to above baseline much quicker this year

Whilst Christchurch contacts in 2021/22 returned to baseline in wc 10th Jan, the other two centres and the national average sat below that mark going into February. In 2022/23, however, we have seen contacts across the board return to baseline as of wc 9th January and they currently remain on an upward trend

## 2021/22




## 2022/23

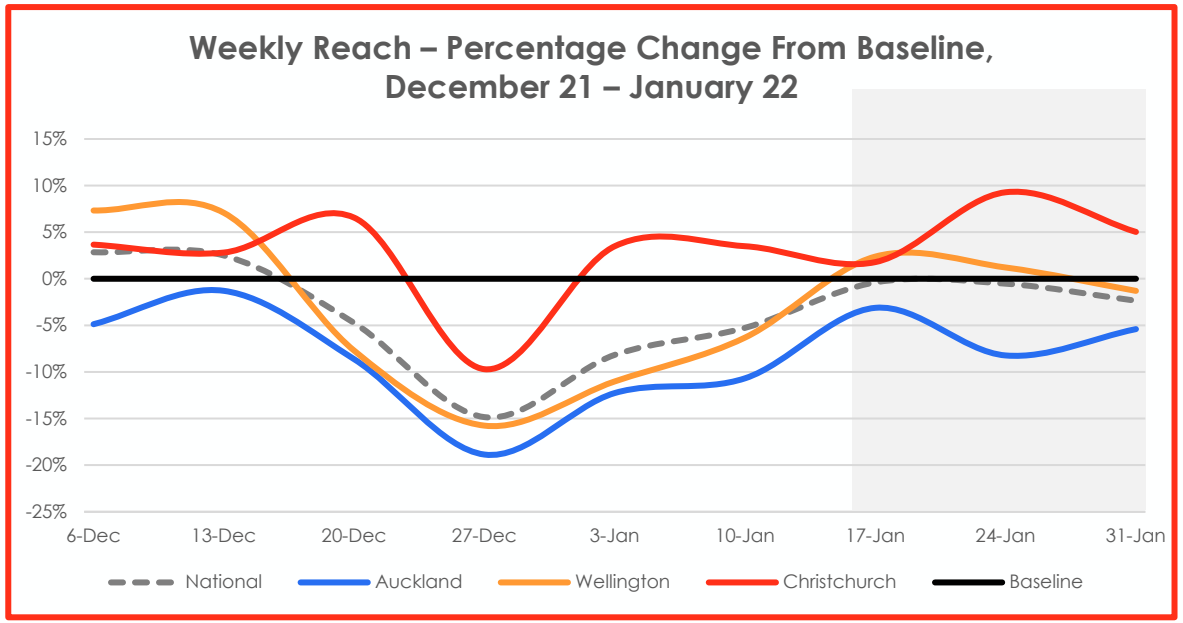



10. Source: LANDMARKS ID
Weekly audience and reach change analysis uses the location events from the time period 3rd August 2020 – 1st August 2021 to calculate an average week versus the respective week noted in the "w/c" time period.
**Weekly Contacts:** Total cumulative audience count, moving past oOh! Street assets across New Zealand, each week

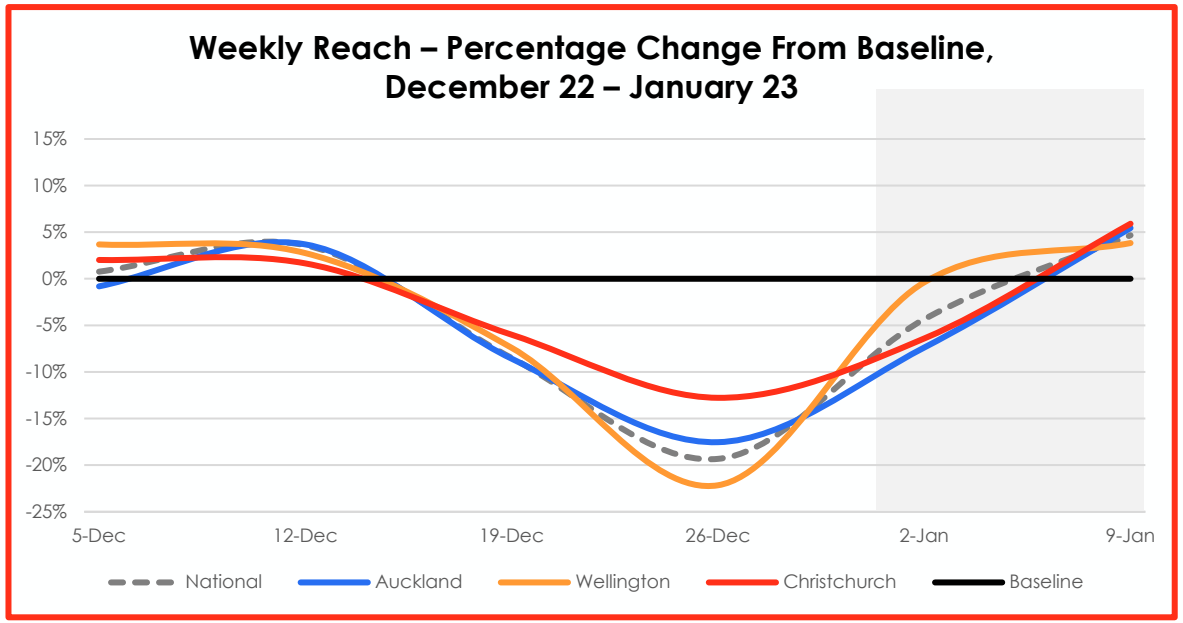
# And oOh! Reach paints a similar picture, rising above baseline in early January on a strong trajectory

2021/22 Reach also saw Christchurch return back to above baseline much earlier than the rest of the country, with Auckland not returning to that mark in January at all. 2022/23 again saw all centres retuning to baseline by wc 9th January, demonstrating how New Zealanders were heading back home from holiday a lot earlier than they have done in the past

## 2021/22




## 2022/23




11. Source: LANDMARKS ID
Weekly audience and reach change analysis uses the location events from the time period 3rd August 2020 – 1st August 2021 to calculate an average week versus the respective week noted in the "w/c" time period.
**Weekly Reach:** Deduplicated unique audience moving past oOh! Street assets across New Zealand, each week

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# oOh! Insights Update

*February 2023*

# Key insights included in this document

Traffic congestion in Auckland across the morning and evening commuter periods has increased post-storms with time taken to travel 10km currently peaking at +9mins longer than normal

Wellington and Christchurch also experience heightened travel times during the same period as people travel to and from work & school

Increased travel times and slower speeds lead to longer dwell times

As a result, commuters have more time to observe and absorb outdoor messaging

Advertisers can take advantage of these commuter periods through pDOOH, activating across oOh!'s extensive network to contextually target consumers in moments that matter

# The recent tragic flooding and storms in the North Island have led to considerable damage and road closures

Stuff ☰ national

## Auckland flood victims anxious as Cyclone Gabrielle barrels towards NZ

Mildred Armah and Shilpy Arora · 15:30, Feb 09 2023

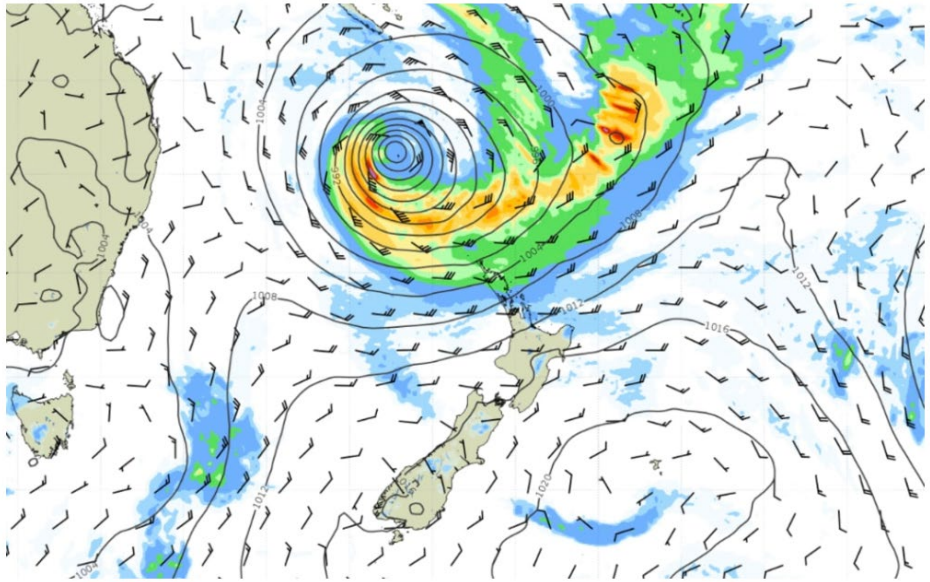

DAVID WHITE STUFF.CO.NZ

Tia Toarea-Katia has lost everything in flood, and is now living with 15 others in a three-bedroom home.

NEW ZEALAND / WEATHER

## Cyclone Gabrielle closes in on Aotearoa: Warnings and forecasts

9:33 pm on 11 February 2023 Share this



MetService's rain forecast as of Sunday 1am. Photo: Supplied / MetService

POLITICS

## Cyclone Gabrielle: $300m for recovery, PM says police have looting under control

By Thomas Coughlan

20 Feb, 2023 06:14 PM · 6 mins to read

Save Share

Sources: Stuff – Auckland Flood Victims Anxious
RNZ – Cyclone Gabrielle Closes in on Aotearoa
New Zealand Herald – Cyclone Gabrielle: $300m for Recovery



ooh! unmissable

# Which in turn has caused issues for public transport, forcing commuters back into their cars and creating congestion on the roads of Auckland

**Bus services that have detours or are suspended due to recent storms**

**Ferry service impacts due to recent storms**

NEW ZEALAND

## The Front Page: March Madness returns – Why are Auckland's traffic jams so bad

By Damien Venuto

22 Feb, 2023 05:00 AM · 3 mins to read

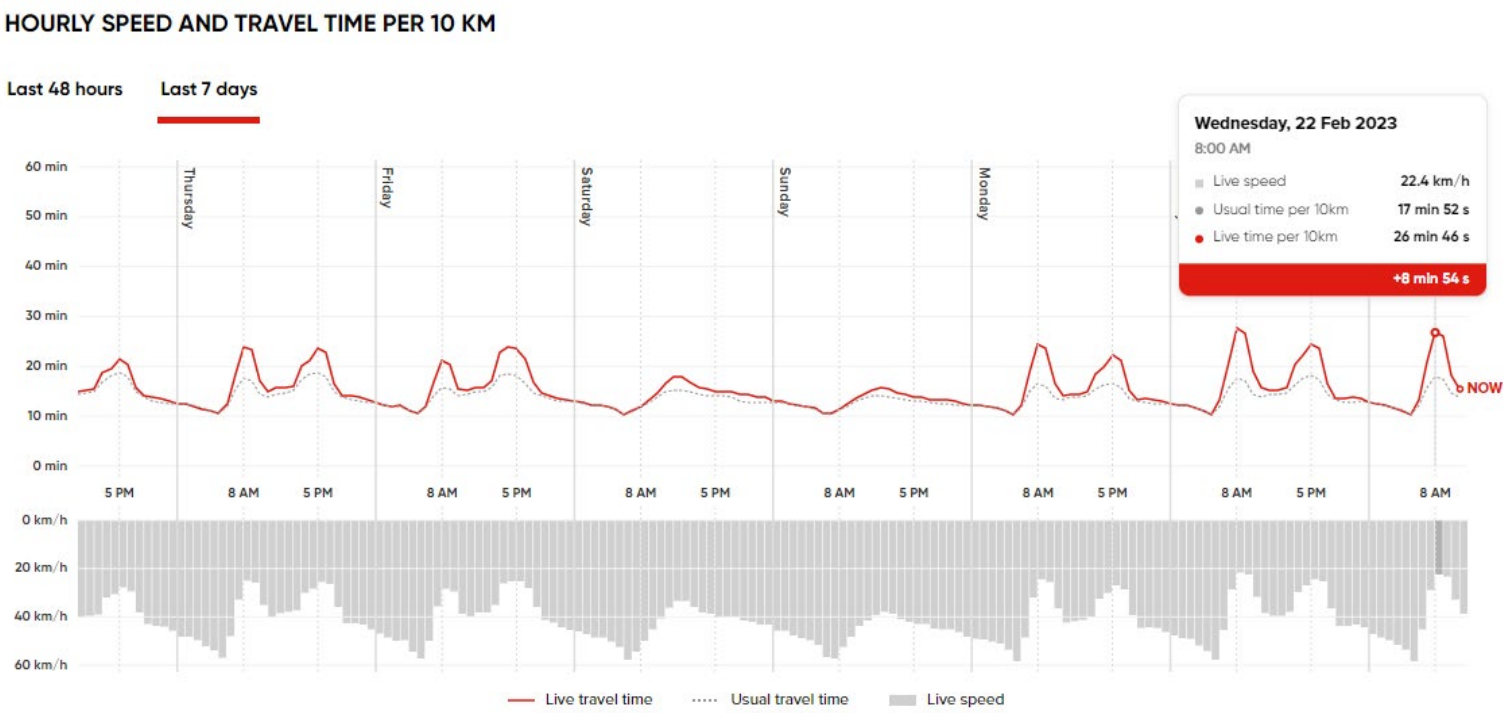
Save | Share

Auckland's traffic woes have returned with full force. Photo / Michael Craig



Sources: Auckland Transport Service Announcements
New Zealand Herald – The Front Page: March Madness Returns

# Auckland congestion spikes during peak hours as the workforce returns to the road in droves




Travel time | Speed | Consumption | Emissions

| | Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|---|
| 12:00 AM | 13 min 50 s | 12 min 30 s | 12 min 30 s | 12 min 40 s | 13 min 10 s | 13 min 10 s | 13 min 50 s |
| | 13 min 50 s | 12 min 20 s | 12 min 20 s | 12 min 30 s | 13 min 10 s | 12 min 50 s | 13 min 40 s |
| 02:00 AM | 13 min 50 s | 12 min 10 s | 12 min | 12 min 10 s | 12 min 50 s | 12 min 30 s | 13 min 30 s |
| | 13 min 30 s | 11 min 40 s | 11 min 30 s | 11 min 20 s | 12 min | 11 min 50 s | 13 min 20 s |
| 04:00 AM | 13 min | 10 min 30 s | 10 min 30 s | 10 min 20 s | 10 min 50 s | 10 min 40 s | 12 min 40 s |
| | 11 min 20 s | 9 min 40 s | 10 min | 9 min 50 s | 10 min | 10 min | 10 min 40 s |
| 06:00 AM | 10 min 20 s | 11 min 30 s | 11 min 50 s | 11 min 40 s | 11 min 50 s | 11 min 30 s | 10 min 10 s |
| | 10 min 50 s | 15 min 40 s | 16 min 10 s | 16 min 10 s | 16 min 10 s | 15 min | 10 min 50 s |
| 08:00 AM | 11 min 20 s | 18 min 50 s | 19 min 50 s | 19 min 40 s | 19 min 30 s | 17 min 40 s | 11 min 50 s |
| | 12 min 10 s | 14 min 40 s | 15 min 50 s | 16 min | 15 min 50 s | 14 min 50 s | 12 min 50 s |
| 10:00 AM | 13 min | 13 min 40 s | 14 min 10 s | 14 min 40 s | 14 min 40 s | 14 min 40 s | 14 min 10 s |
| | 13 min 40 s | 13 min 50 s | 14 min 20 s | 14 min 40 s | 14 min 50 s | 15 min | 15 min 10 s |
| 12:00 PM | 14 min 30 s | 14 min 10 s | 14 min 50 s | 15 min 10 s | 15 min 30 s | 15 min 50 s | 16 min 20 s |
| | 14 min 20 s | 14 min | 14 min 30 s | 15 min | 15 min 10 s | 15 min 50 s | 16 min |
| 02:00 PM | 14 min | 14 min 20 s | 15 min 10 s | 15 min 40 s | 16 min 10 s | 17 min | 15 min 40 s |
| | 13 min 50 s | 16 min 20 s | 17 min 40 s | 18 min 10 s | 19 min 10 s | 20 min 40 s | 15 min 20 s |
| 04:00 PM | 13 min 30 s | 17 min 40 s | 19 min 40 s | 20 min 20 s | 21 min | 21 min 10 s | 15 min |
| | 13 min 30 s | 19 min 10 s | 22 min | 22 min 40 s | 22 min 40 s | 19 min 40 s | 15 min 20 s |
| 06:00 PM | 13 min 20 s | 15 min | 16 min 50 s | 17 min 30 s | 18 min | 16 min 40 s | 15 min 30 s |
| | 13 min | 13 min 30 s | 13 min 50 s | 14 min 20 s | 14 min 40 s | 14 min 50 s | 14 min 40 s |
| 08:00 PM | 12 min 50 s | 13 min 20 s | 13 min 40 s | 14 min | 14 min | 14 min 20 s | 14 min 20 s |
| | 12 min 50 s | 13 min | 13 min 30 s | 13 min 50 s | 13 min 50 s | 14 min 20 s | 14 min 30 s |
| 10:00 PM | 12 min 50 s | 13 min | 13 min 20 s | 13 min 30 s | 13 min 40 s | 14 min 10 s | 14 min 30 s |
| | 12 min 30 s | 12 min 50 s | 13 min | 13 min 20 s | 13 min 20 s | 14 min | 14 min 20 s |

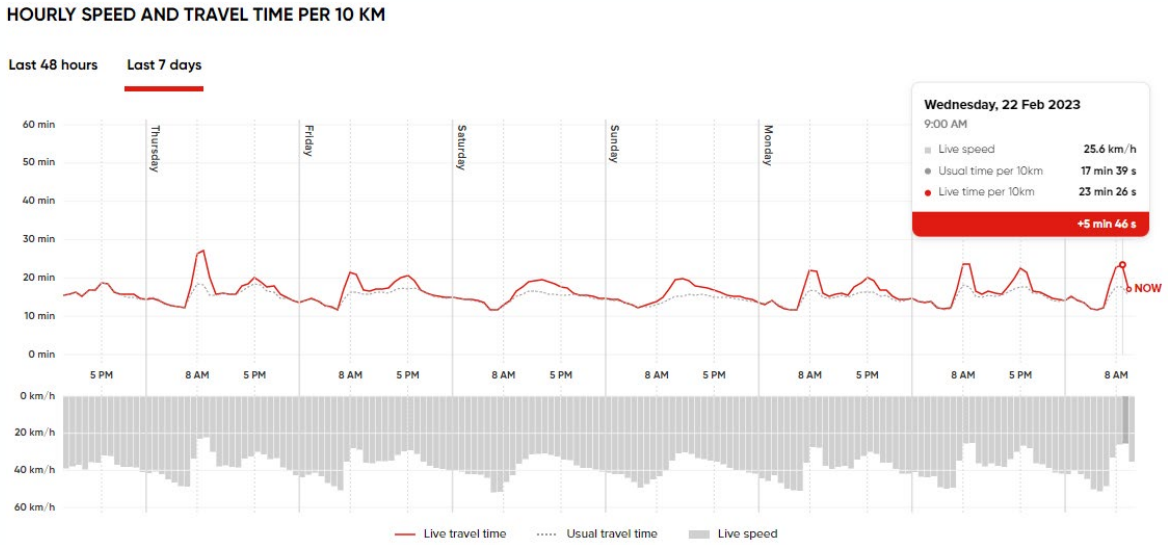
Show travel time per 10 km

Auckland traffic congestion during the morning and evening commuter periods is sitting at increased levels post-storm, with the time to travel 10km peaking at almost +9 minutes longer than usual. This shows that Aucklanders are returning to work and battling through traffic to do so. The slow speeds they're traveling are increasing dwell times meaning they have more time to observe and absorb Outdoor advertising as a result.

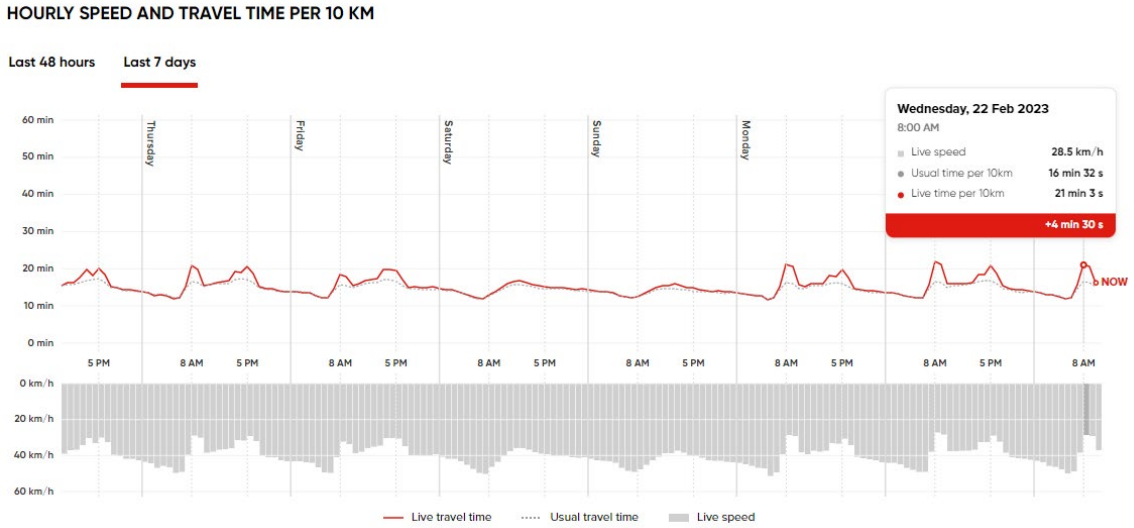
16. Source: TomTom Traffic Congestion Data
https://www.tomtom.com/traffic-index/auckland-traffic/

# But it's not just Auckland that sees consistent congestion, with Wellington and Christchurch experiencing similar trends

## Wellington




## Christchurch




We see the same congestion trend across the other two main mets, Wellington and Christchurch, with the morning and evening commutes seeing people stuck in traffic and moving at a much slower pace than usual creating longer stagnant periods on their journeys and opportunities to take in Outdoor advertising.

Source: TomTom Traffic Congestion Data

17. https://www.tomtom.com/traffic-index/wellington-traffic/
https://www.tomtom.com/traffic-index/christchurch-traffic/

# Take advantage of traffic congestion with oOh! pDOOH

Using **oOh! pDOOH**, advertisers can **take advantage of heightened congestion**

Advertisers can set up a **time targeted buy** and hit audiences with **contextually relevant creative** or simply **take advantage of increased dwell times**

**Real-World Example:**

Pre-flooding and storms, **Auckland Transport used pDOOH to time target two key commuter periods** across the day:

- Morning Commute: 6am – 10am
- Evening Commute: 3pm – 8pm

The **goal of the campaign** was to **target audiences while they were sitting in traffic** and encourage them to use public transport instead

By using pDOOH, Auckland Transport was able to **spend their campaign budget more efficiently** and **reach their target audience at scale through the oOh! network** in periods that were **contextually relevant**