

A Researcher's look at Shelter Advertising

Presented to the Shelter Advertising Association Meeting

"How Shelter Advertising Fits in Your Media Plan"

60 East Club

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In the course of building Perception Research Services into a major communications research organization, I've been fortunate, or you might say unfortunate, to work extensively in the evaluation of all types of promotional material. At Perception Research we pre and post test print advertising, packaging, point-of-sale material, out-of-home promotions and, in some instances, as you might expect, shelter advertising. In our quest to provide insightful evaluation, we've realized that there are a number of common factors which lead to sale and, after all, that's what advertising, copy research and, media selection are all about --- selling.

When an agency begins developing a campaign they are basically attempting to deliver:

- Stopping power
- Impact
- Imagery

The hope is that these three elements will lead to sale. Therefore, when evaluating and selecting the proper media, not only do you look at costs, but you also consider the ability of each media to deliver in these three areas; Stopping power, impact and image building.

The common problem each advertiser tries to overcome is clutter. Clutter is a problem in TV; it's a problem in magazine advertising; it can be a problem in outdoor. But, one unique advantage we've observed with shelter is that clutter is virtually eliminated.

By tracking reader behavior, using PRS eye tracking, we've documented that roughly 13% of the ads in a magazine are totally missed by the reader. One of the causes is the facing page.

Another is the clutter numerous ads for the same category appearing in the same publication. In one magazine we counted 46 ads for the same category.

Another problem, which the eye tracking has documented, is the tendency of readers to quickly examine advertising and miss the brand name. For example, in magazines we're finding that 43% of the advertisers' names are overlooked by the reader. Unfortunately, this is a common problem. But, on the other hand, it is one that can be overcome. Our experience indicates that many of the agencies are simply not putting in the time and effort to develop effective print ads. They appear to be working on the assumption that a reader will move through a print ad from top to bottom yet, in reality, we're finding that readers are selective. They skim, they quickly glance and, in many instances, they miss who we are and what we're trying to say and sell.

Our research evaluating shelter advertising leads me to the conclusion that the shelter configuration can greatly enhance an advertiser's opportunity to have his copy read. Keep in mind, all out-of-home advertising should not be lumped together. A pedestrian walking on the sidewalk is not moving at 55 miles an hour. Thus, shelter advertising provides the marketer the opportunity not only to generate exposures but to also trigger interest and readership of subordinate, yet vital, copy.

The task of documenting the effectiveness of any new advertising medium is difficult. Potential users are always looking for hard data, which prove the medium's ability to be cost efficient and to generate sales. Unfortunately, documenting sales success is a long and

arduous task. In many cases the resulting data is either inconclusive or highly suspect. Yet, how can we ignore the fact that few advertisers can quantify the sales generated by a 30-second TV commercial, or the influence of a single page ad in a publication? Each medium, I believe provides the advertiser access to people and, during those few seconds of access, the advertiser expects the combination of advertisement and medium to contribute to the long-term success of its brand.

A few years ago Perception Research Services attempted to provide an indication of the viability of shelter advertising by documenting consumers' viewing behavior and attitudes toward shelters from those few seconds of access. The research we conducted was designed to uncover the ability of shelters to:

- Generate attention
- Build brand awareness
- Enhance brand imagery

Again, I refer to these prime ingredients, for together they can lead to increased sales for existing brands and new product trial.

The research was implemented in two phases - 150 "on street" interviews in Philadelphia, and 90 "controlled environment" interviews in northern New Jersey. All interviewing was conducted with target consumers, i.e., adults who drank liquor and smoked cigarettes, one cognac drink, one vodka drink and one scotch. The results indicated:

- Shelter advertising has the ability to attract attention and generate attention in daylight are involvement
- Shelter generate attention in daylight hours and are most effective when illuminated in evening hours
- Shelters contribute to the overall effort of generating brand name registration and communicating sales messages
- The creative execution employed within a shelter can enhance or, in some instances, detract from the overall effectiveness of the shelter
- Shelters evoke favorable comments from shoppers and tend to be viewed as convenient, safe, clean, and easy to see structures that employ attractive, modern up-to-date advertising.

We evaluated the shelters both in the evening and during daylight. We also looked at impact from the point of view of a walking pedestrian and a driver in an automobile.

A few tidbits from the PRS eye tracking showed that:

- The passerby tends to examine shelter advertising using several brief glances. The nearer individuals come to a shelter, the longer they tend to examine it
- Shelters are most effective in terms of attracting quick attention and generating involvement when illuminated in the evening hours
- Shelters are least impactful when individuals drive past the shelter during daylight hours

In daylight hours, as a pedestrian approached the shelter, it was viewed six to seven times, totaling slightly over five seconds of examination. This exposure time is more than double

that documented by PRS eye tracking for outdoor boards and almost equivalent to that generated by print ads:

- The eye tracking showed, as pedestrians approached a shelter during daylight hours, more than eight in ten were likely to see the board from a distance of 24 feet. In nighttime hours nine in ten were drawn to the shelter.
- When driving at night and approaching shelters at a distance of 60 feet, more than seven in ten individuals were likely to see the board. The comparable figure for daylight driving was less than five in ten.

As many of you know, or might have guessed, recall scores fail to reflect the full visual impact of shelter advertising or for that matter, the impact of any other media. Eye tracking shows, at minimum, eight in ten individuals who pass by a shelter take notice of the advertising. Yet, recall scores indicate that less than one-half of those who see will remember.

One hundred fifty "on the street" pedestrian interviews, conducted in Philadelphia, generated a spontaneous recall level of 21%. When the passerby was given the name of the advertising product by the interviewer, the aided recall level increased to 37%. These levels are commendable when one considers the normative "day after" recall levels for print advertising of approximately 13% for TV commercials it's approximately 20%.

Thus, from using eye tracking to pinpoint the seeing experience, and recall to find out what people took out, we've clearly demonstrated that shelter advertising has stopping power and is memorable, i.e., it delivers on the first two dimensions leading to sale.

When we conducted our research in Philadelphia, we tried to uncover pedestrians' feelings about shelter advertising. The results might startle you. For example, 83% felt shelters were convenient; 81% felt they were useful and 74% felt they were modern, up-to-date.

The public's attitude toward shelter advertising was equally favorable, 84% felt they were easy to read; 625 said they were eye catching; 55% said they were informative and 58% expressed the comment that they were an effective media. Only 7% of those interviewed in Philadelphia considered shelter advertising unappealing and only 3% felt shelter advertising was cheap looking.

It's evident that shelter advertising is well received, it's aesthetically pleasing and it can help build a brand's image. Thus, from what we see in our research, we believe it's clear that shelter advertising delivers in the three primary areas, which lead to sale. It has stopping power, it's impactful and it can help build a brand's image.

Of course, there are other considerations, which have to be built into the equation; for example, cost efficiency and appropriateness of product category. I'm not equipped to answer the question of cost efficiency, but I might throw a few tidbits at you concerning appropriateness for the category and how we at PRS believe shelter advertising can be used most effectively.

The POPAI/DuPont Consumer Buying habits Study documents that in-store decisions account for about two-thirds (64.8%) of every dollar spent in the marketplace. This startling finding qualifies the importance of proximity of advertising to point-of-purchase as, i.e., the importance of packaging and the importance in-store displays. But it also provides a strong selling tool; for shelter advertising, for a shelter advertiser can select locations close to retail outlets. He can, I believe, stimulate impulse purchase.

Let's use a few examples. A 90 degree summer day here in New York City and a shelter ad showing a nice thirst quenching Good Humor ice cream. How about a winter example - an account executive sitting behind his desk with a runny nose and a steaming cup of Lipton's Cup-a-Soup.

What I'm basically saying is I don't believe that shelter advertising need used as simply a "reminder". I believe effective use of shelters can stimulate impulse purchase and, in many instances, can also help close sale.

I know, from our research, that shelter advertising is likely to be seen and read, if the purpose of copy is to help close sale then the shelter media should be an effective delivery vehicle.

Many people say that out-of-home advertising is good for cigarette advertisers. It's good for liquor advertisers. But, it's not good for "my" category. I find that argument a little bit difficult to swallow. Again, let's not forget that the purpose of advertising and promotion is to help sell product and the function of an effective medium is to deliver stopping power, memorability and image. This does not have to be limited to cigarette advertising or to distill spirits executions.

I believe out-of-home advertising, specifically, shelter advertising, is superb vehicles for a new product introduction. They offer continuous repeat exposure, and none of us will argue with the assumption that repeat exposure helps build brand awareness. Perhaps the best example of using out-of-home advertising has generated extraordinarily high levels of brand awareness for Captain Morgan. You'll note now that many other products are beginning to use shelters and outdoor to build awareness for their new products. Grand Marnier cream is one example. Another category, which could use shelter advertising to stimulate off the rack sales, would be publications. A monthly magazine could vastly increase its issue awareness.

All too often it's been my experience that marketer and agencies tend to position out-of-home advertising per se as supplemental or reinforcing. I submit that the thought process should be reversed. The shelters, as well as outdoors, should be used for new product introductions. They should be used to build rapid awareness, not just reinforce.

Some of you may be aware that PRS is now in the midst of conducting a major study on the visual impact and stopping power of outdoor boards. We doing this to try to provide media people a better understanding of what you're buying. Our attempt is to document the attention-getting ability of boards when positioned on the left and right of the highway, of painted spectaculars versus traditional 30-sheet posters, of the use of extenders and of the likelihood of advertising which is passed at 55 miles an hour or faster, to be seen and read. It is fine to say that "X" number of people pass a board or read a magazine or watch a TV show,

but the missing link is the number who really take the time and the effort to get into the advertising and to give it a chance to work.

If you look objectively at why you buy a certain media and what it should be delivering to the advertiser, you must work on the assumption that fighting through clutter is essential, stopping power and readership is vital, and imagery can be built or enhanced through effective visual presentation of the product and its message. If a media can deliver in each of these areas, it should be considered for use and it should be considered not only in a few select categories but also in the wide spectrum of categories.

I submit that if so much of the purchasing being done by the consumer is affected by impulse selection, then the closer the advertisement gets to point-of-sale, the greater chance it has to influence the purchase decision. Shelter advertising can get close to the purchase decision.

I also suggest that creative departments step back bit and realize that not all out-of-home advertising is the same. The complexity of an out-of-home board can vary depending upon where it will be located - on a highway, in the inner city or on a shelter.

I believe sometimes we become all too reliant on numbers. The one common denominator, which must be adhered to, is common sense. And common sense says that shelter advertising seems to be good buy.

Thank you