

The PRS Eye Tracking Studies

Validating Outdoor's Impact in the Marketplace

1999 — 2000



PERCEPTION
RESEARCH
SERVICES, INC.

BACKGROUND

In 1999, the Outdoor Advertising Association of America, Inc. commissioned Perception Research Services to conduct a series of studies to measure how consumers observe and react to outdoor advertising. The goal of these studies was to uncover the levels of attention given to outdoor media. Special ShopperVision™ eyeglasses were used to document the “actual” seeing experience from a passenger’s perspective.

In 1999, tests were conducted in the New York and Los Angeles metro areas. The third phase was conducted in the spring of 2000, in the Minneapolis metro area. The study examined a variety of outdoor vehicles, displaying creative from a wide range of product categories. Several hundred passengers were surveyed, and the results of each market shared striking similarities.

PRS FINDINGS

HOW MUCH OUTDOOR IS REALLY SEEN ON THE ROADWAY? HOW MUCH IS READ?

- 70% of boards within the passengers’ field of vision were examined.

Of this group, 63% of boards are likely to be read.

An examination of the attention levels generated by outdoor boards by age of rider showed that younger riders (18-34) were likely to take in more outdoor visuals, while adults 35-49 were more likely to read outdoor advertising copy.

IS OUTDOOR ADVERTISING EFFECTIVE AT INFLUENCING PURCHASE DECISIONS?

- 26% of respondents state that the outdoor advertising observed would influence their purchase decision.

The study showed that women were more likely to note and read outdoor than were men. However, when men and women were later questioned on the likelihood of the outdoor advertising to stimulate product purchase, men were more likely to be influenced.

HOW DO VARIOUS OUTDOOR VEHICLES PERFORM IN THE MARKET?

For trivisions.....

- 95% of passengers examined the tri-vision with 87% likely to read the tri-vision

For bus shelters.....

- 59% of bus shelters were examined by a passenger travelling past the shelter.

Of this group, 38% of the bus shelters are likely to be read.

* Bus shelter findings based on vehicular response, not inclusive of pedestrian response. Actual bus shelter figures are likely to be higher if combined with pedestrian viewers.

HOW EFFECTIVE IS OUTDOOR FOR TARGETING SPECIAL SEGMENTS OF THE POPULATION?

For Hispanics...

- Among the Hispanic group, 66% of boards within the passengers' field of vision were examined. Of this group, 58% of boards are likely to be read.

- 26% of Hispanic respondents state that outdoor would influence a purchase decision.

Hispanic and non-Hispanic passengers in automobiles view and read outdoor boards in an identical manner. Information generated via PRS ShopperVision™ eyeglasses have documented that 65% of boards within a driver's field of view are likely to be seen. The comparable figure for Hispanic passengers is 66%. In addition, 39% of boards within a passenger's field of view are likely to be read. Readership among Hispanic passengers is 38%. Accordingly, for all passengers within an automobile 60% of boards that are noted are likely to be read. For Hispanics 58% of boards that are noted are likely to be read.

In addition, Hispanics indicate that they are far more likely to be influenced by outdoor advertising than are non-Hispanics. Seventy-six percent (76%) of Hispanics indicate that they would be definitely or probably influenced by outdoor advertising. The comparable figure for non-Hispanics is 41%.

VISIBILITY VS. RECALL

This study addressed the relationship between visibility and recall scores. This two-year study shows that the levels of visibility to outdoor boards are three (3) times higher than recall levels would indicate (board noting average 70% vs. board aided recall average 26%). In addition, riders claim to recall boards and brands that were never posted. Unaided recall is not the best-suited method to assess ad effectiveness for most brands in most product categories. Very few purchasing decisions are actually made without a visual or verbal cue. Aided recall and ad recognition are considered more accurate assessments of advertising effectiveness for most types of products.

ATTRACTIVENESS AND MEMORABILITY OF OUTDOOR BOARDS

Certain qualities improve the attractiveness and memorability of the advertising.

The primary reasons for remembering a board:

Bright/cheerful colors	30%
Uniqueness(movement, extensions)	26%
The color "yellow"	18%
Catchy/clever/cute/humorous	14%
Personal relevance	14%
Familiarity / repeat exposure	12%
Product illustration	12%

SUMMARY

The implications are clear, an outdoor advertiser can expect nearly three quarters of riders in an automobile to examine a board that is in their field of vision and 63% of these boards will be read or examined more than once, as the automobile passes the location. The combination of high levels of visibility with effective creative execution can provide marketers a cost efficient opportunity to reach their target buyers and to also motivate them to consider product purchase.