

JCDecaux

LEVERAGING THE AIRPORT MINDSET FOR INFLUENTIAL CAMPAIGNS



A JCDECAUX INTELLIGENCE NEUROSCIENCE STUDY
NOVEMBER 2022



NEURO-INSIGHT

JCDecauxAIRPORT

JCDECAUX NEUROSCIENCE

This is our **second local neuroscience study with Neuro Insight**, the world's leading marketing neuro-research firm, using patented technology

Inspired by international studies, **The Science of the Art of Outdoor**

95% of decision making is driven by our sub-conscious; which consumers struggle to articulate

Neuroscience accurately measures **the brain's response in the moment** and effective Memory Encoding has a **86% correlation to sales***



2022 FINDINGS: LARGE FORMAT ROADSIDE

1

Large format is a powerful, spatial media. Proven **high probability to influence future purchase** due to memorability of campaigns

2

With a bias to global memory encoding, **large format can communicate meaningful brand messages or connections**, in a glance. Comparative 15s tvc for impact and intensity

3

Commanding size, quality, viewability, **location of JCDecaux touchpoints influenced memory encoding** outcomes.

4

Large format primes consumers for mobile; **making digital advertising more effective**



JCDecaux Large Format sites are influential and deliver memory encoding within the sweet spot that we know drives future behaviour. Their **commanding nature and size, consumed in the context of the environment, delivers emotional horsepower or intensity** which supports a memory encoding bias to the right hemisphere of the brain (which leads to a deeper connection).

Director of Research
Neuro Insight

JCDecaux



NEURO-INSIGHT



Previous studies have shown that ads with high emotional intensity and higher global memory are generally more effective. **Emotion is important in triggering memory**, and we know that memory drives decision making and future behaviour.

The high peaks in memory encoding achieved by **JCDecaux Large Format in this study**, have been validated both scientifically and commercially, to drive mental availability and future behaviour.

Director of Research
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NEUROSCIENCE 101. CONTEXT FOR THE RESULTS TODAY...

- Key Metric: Long Term Memory Encoding
- When exposed to stimulus, the brain stores what it deems to be of importance (for future use)
- Memories stored in 'brand rooms' in the brain, furnished with associations
- Memory Encoding >0.7 indicates the brain is storing information or 'memories'
- In a moment of need (often a purchase), the brain recalls memories to aid decision making

MEMORY ENCODING = MEMORY STORAGE = INFORMATION TO INFLUENCE FUTURE BEHAVIOUR

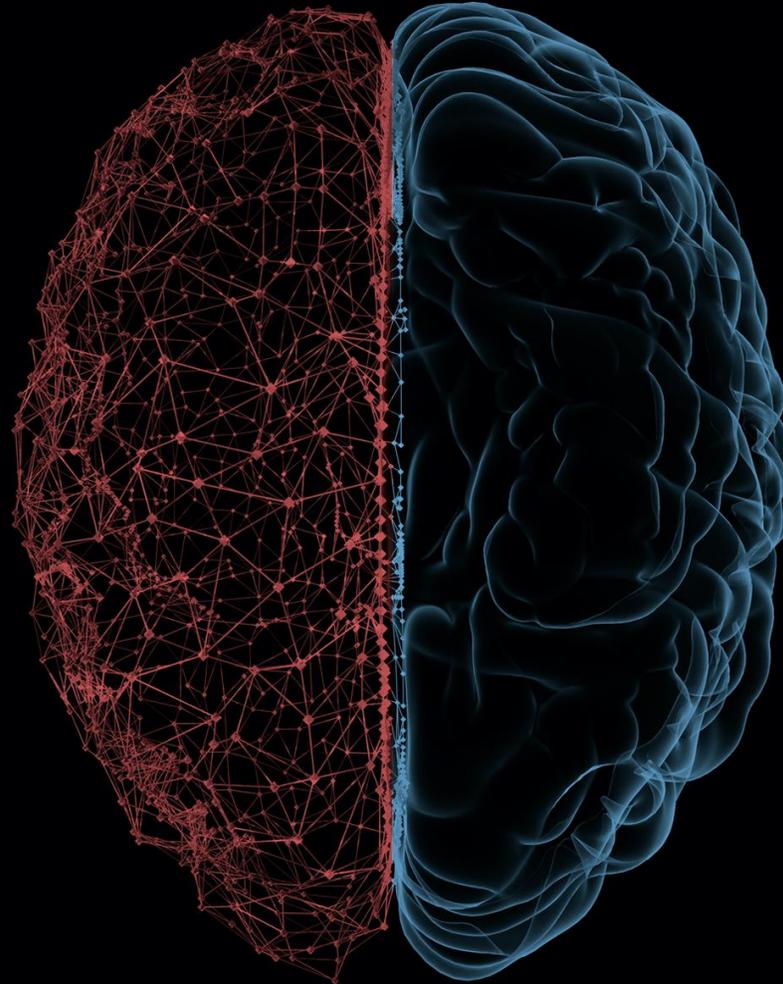
MEASURING MEMORY ENCODING

PEAK or AVERAGE
TOTAL or GLOBAL/ DETAILED

LEFT BRAIN

Detailed memory encoding

The left hemisphere of the brain likes to encode **micro elements**, such as facts, details, words or price



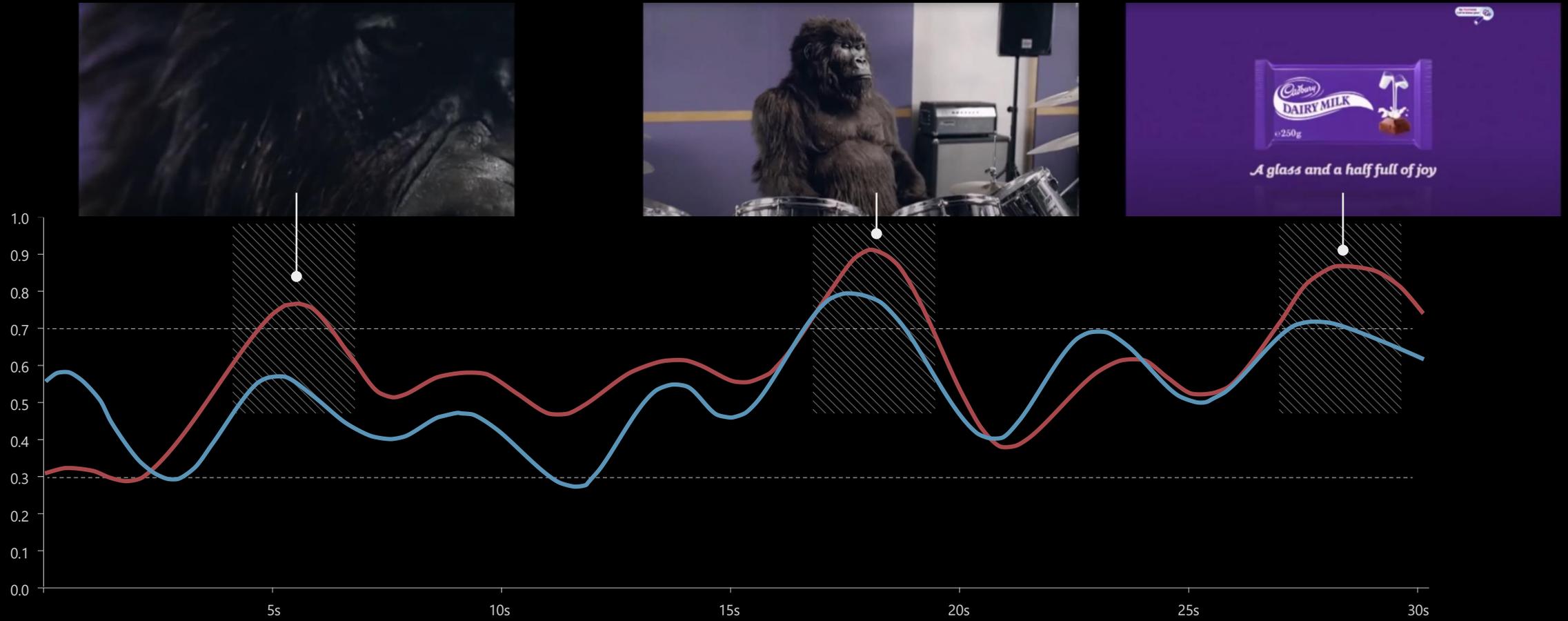
RIGHT BRAIN

Global memory encoding

The right hemisphere of the brain likes to encode **macro elements**, such as meaning, connotation, feelings, big picture, environment

MEMORY ENCODING CASE STUDY

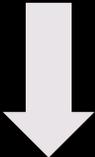
SECOND-BY-SECOND ANALYSIS OF SPECIFIC NEUROMETRIC PERFORMANCE



— Detail Memory Encoding — Global Memory Encoding - - - Effectiveness benchmark

JCDECAUX EXAMPLE 2022 ROADSIDE

Site comes into view

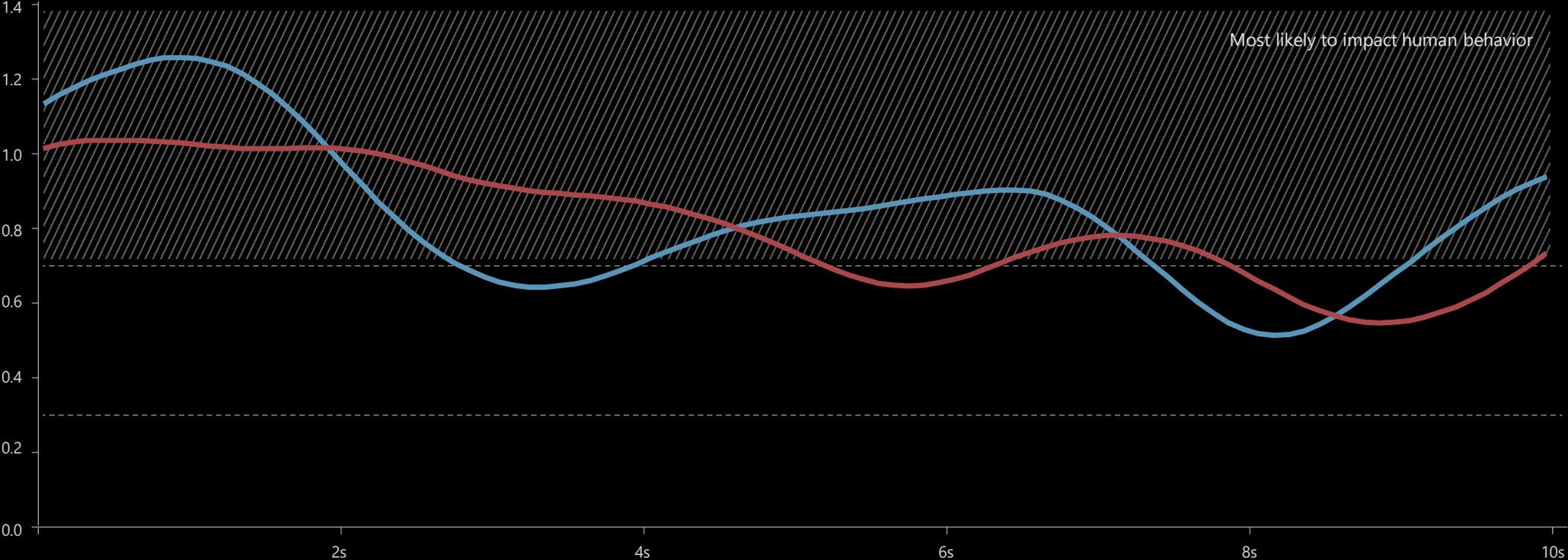


Drive by site



SECOND-BY-SECOND ANALYSIS OF SPECIFIC NEUROMETRIC PERFORMANCE

— Detail Memory Encoding — Global Memory Encoding - - - - - Effectiveness benchmark



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AIRPORT MINDSET STUDY

OBJECTIVE

To understand the emotional mindset of passengers during a typical airport traveller experience

Measure how JCDecaux Airport touchpoints influence travellers during their journey





International
airport experience

First New Zealand
Airport Study by
NeuroInsight

77 respondents

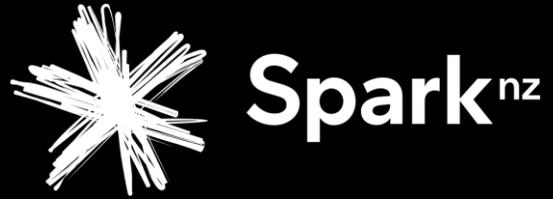
Virtual journey
(arrival, path to
plane, destination
arrival, exit to
landside)

30 minute video
24 JCDecaux sites
3 Brands 9 pieces
of creative

Static and digital
creative mocked onto
JCDecaux Airport sites:
Approach and
Internal

Sub-conscious neural
response measured

THREE PARTNER BRANDS



← Arrivals

THE UNIQUE AIRPORT MINDSET IS A REALITY

1. High levels of memory encoding were experienced in the airport environment which will influence future consumer behaviour
2. Unique neuro-state of fluctuating bias between detailed and global memory occurred throughout the airport journey
3. High emotional intensity was also observed by the respondents with consistent peaks at key moments of the journey





IMPLICATIONS FOR BRANDS:

The Airport is a **unique environment for advertisers where emotions are high** and the brain shows high levels of memory encoding.

A captive audience, with high dwell time, **experience advertising as part of the overall travel experience.** Close proximity to advertising formats enables attention and engagement.



1

FINDINGS

AIRPORT TOUCHPOINTS

**OVER-DELIVER
MEMORY ENCODING**

JCDECAUX AIRPORT
TOUCHPOINTS

| To/via & Airline | Depart Status |
|----------------------------------|-----------------------------|
| Pyongyang QF144 EK5114 | 14:00 Check in |
| Melbourne QF156 TN1403 | 14:05 Check in |
| Noumea SB411 TN1601 | 14:10 Enregistrement |
| Dubai EK451 | 14:15 Check in |
| Los Angeles AA82 | 14:50 Check in |
| Bangkok TG492 NZ4192 | 14:50 Check in opening soon |
| 香港 CX198 LH7020 | 15:00 辦理登機手續 |

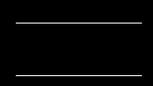


Departures Security
Estimated time through Customs and Aviation Security
ePassports Less than 5 minutes
All other passports Less than 5 minutes

International departures 国际出发
Passengers only 只限乘客

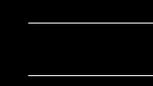


AVERAGE
PEAK ME



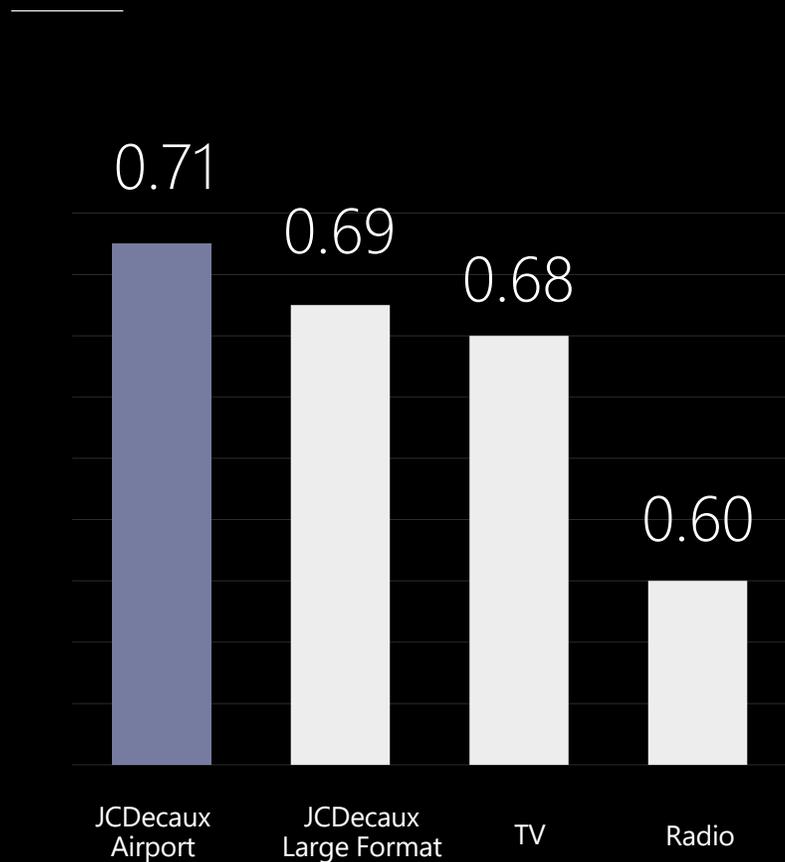
0.71

HIGHEST
PEAK ME



1.07

Other Neuroscience studies compared with JCDecaux Roadside and Airport





IMPLICATIONS FOR BRANDS:

Airport advertising is memorable and **competes strongly with other channels** to assist with memory encoding for all brands.

High memory encoding scores tells us that advertising on airport touchpoints is **creating new memory structures or reinforcing existing ones.**

This means **the airport environment will build mental availability and drive future consumer behaviour.**

2

FINDINGS

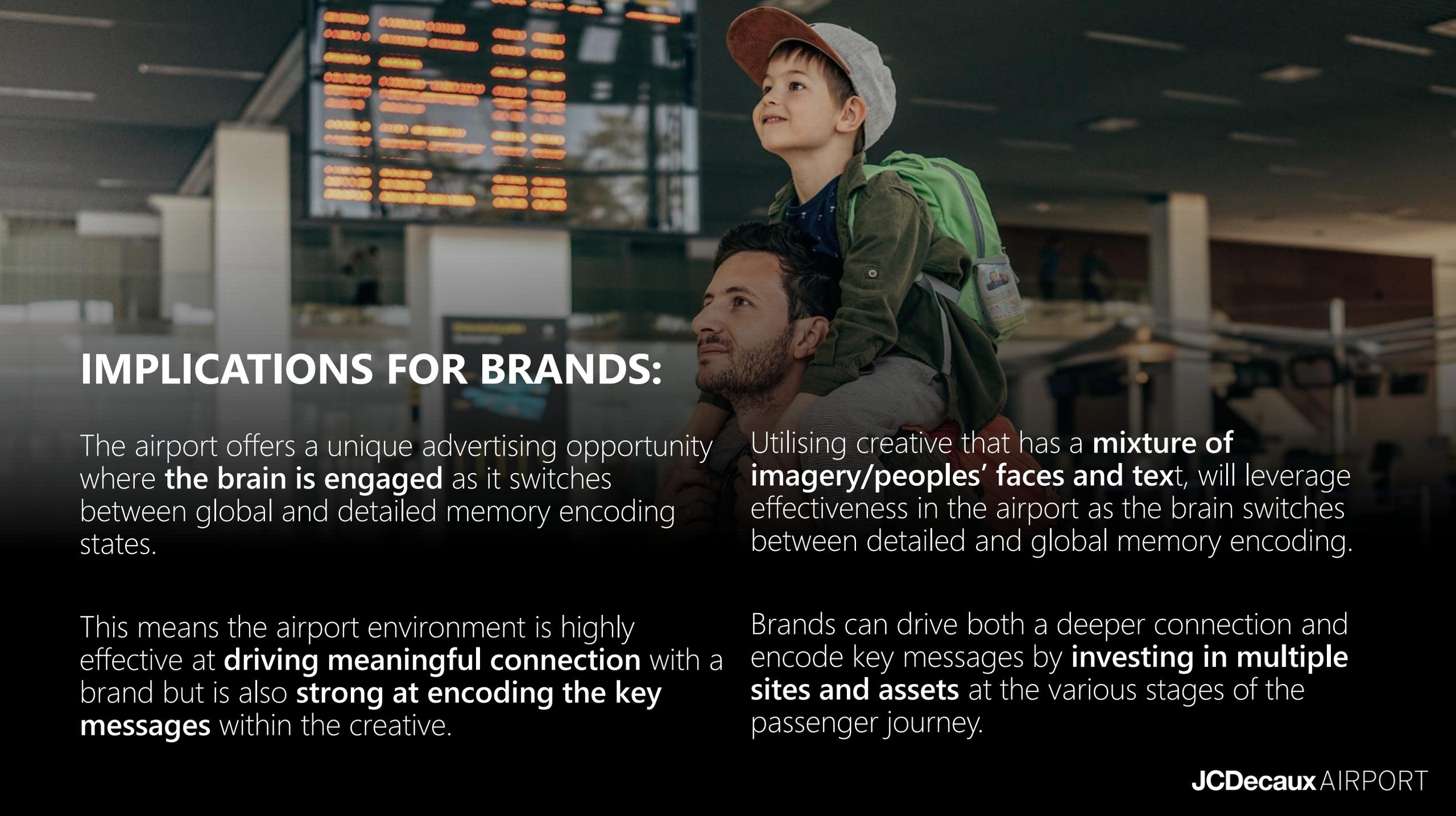
A COMBINATION OF
DIFFERENT AIRPORT ASSETS
**DELIVERS VERSATILITY IN
MEMORY ENCODING BIAS.**



Due to the changing nature of the Airport environment, checking in, looking for information, security, departures, arrivals, passport control, baggage claim etc...combined with the varied OOH site contexts, we saw the brain continually switching between detailed and global memory encoding, even when the creative was identical.

This means that **investing in multiple airport OOH sites can help to encode many different aspects of the creative** to support both a long term meaningful connection with a brand, or to encode a more detailed short term activation.

Brian Hill
GM APAC
Neuro Insight



IMPLICATIONS FOR BRANDS:

The airport offers a unique advertising opportunity where **the brain is engaged** as it switches between global and detailed memory encoding states.

This means the airport environment is highly effective at **driving meaningful connection** with a brand but is also **strong at encoding the key messages** within the creative.

Utilising creative that has a **mixture of imagery/peoples' faces and text**, will leverage effectiveness in the airport as the brain switches between detailed and global memory encoding.

Brands can drive both a deeper connection and encode key messages by **investing in multiple sites and assets** at the various stages of the passenger journey.



3

FINDINGS

KEY AIRPORT TOUCHPOINTS

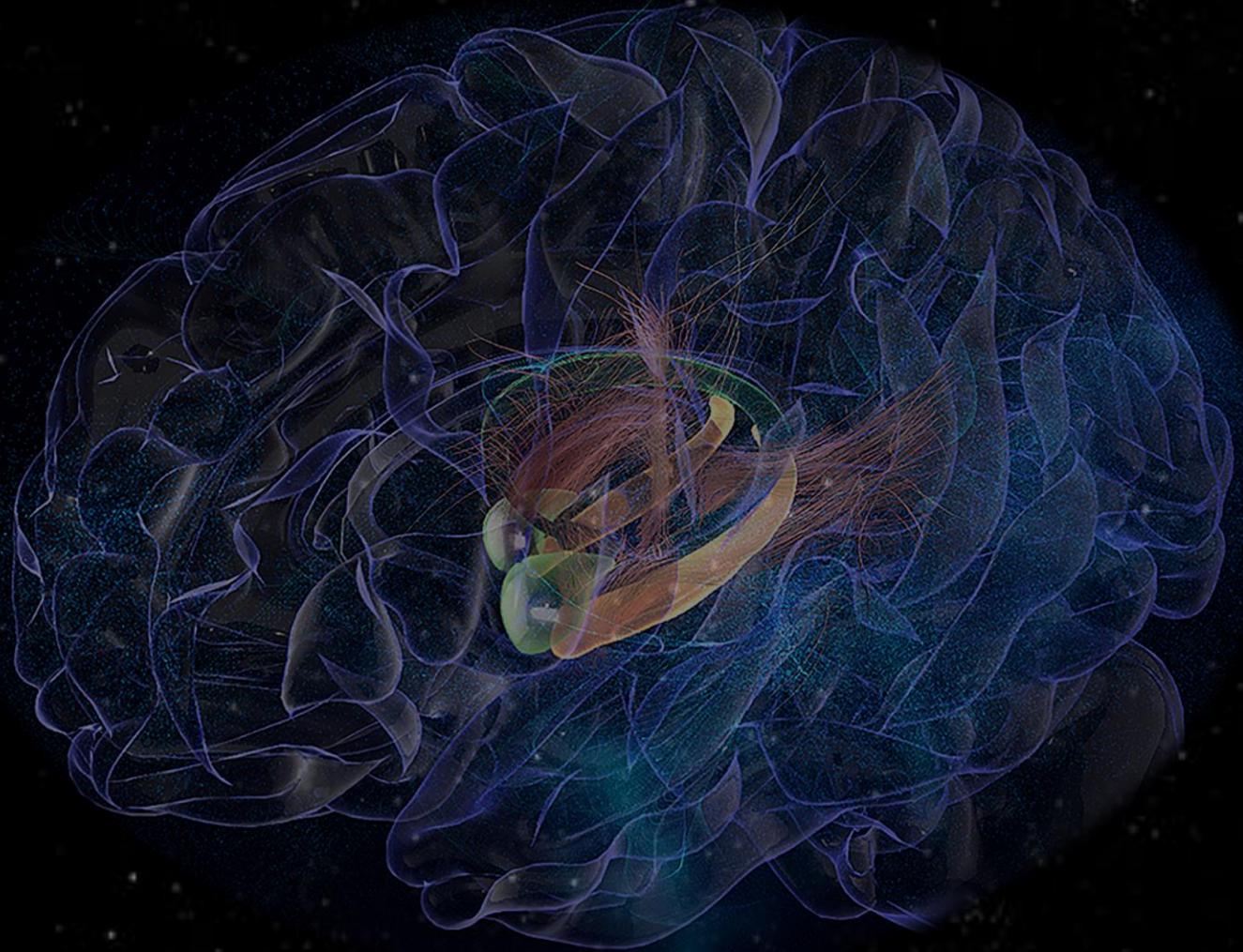
**PRODUCE HIGH
EMOTIONAL INTENSITY**

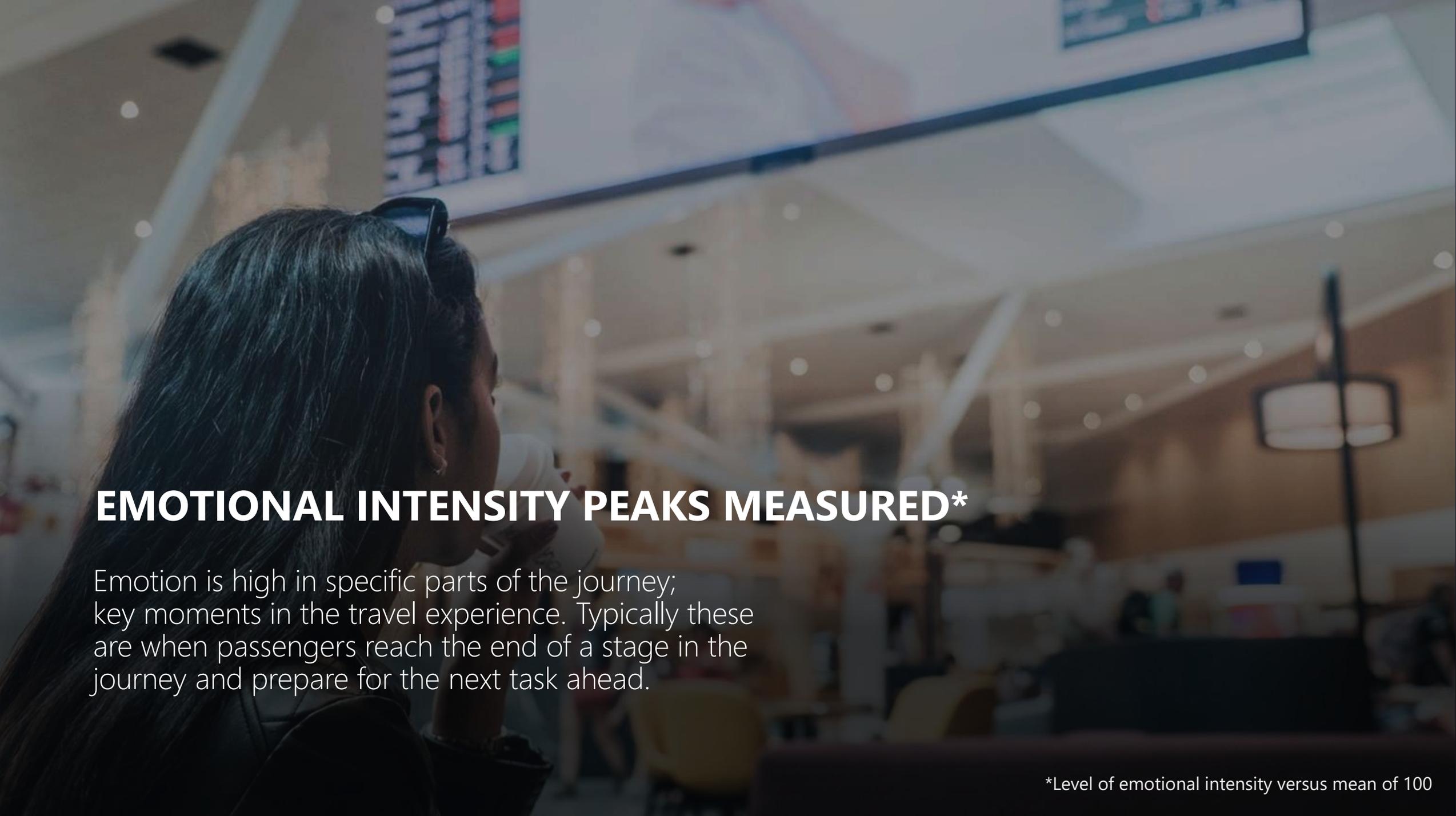
EMOTIONAL INTENSITY

High levels of emotion heighten our ability to encode experiences to memory.

Our brain commits more energy to emotions because they are a signal to the brain that what we are experiencing is important.

Some touchpoints within the airport environment showed much higher emotional intensity than others.





EMOTIONAL INTENSITY PEAKS MEASURED*

Emotion is high in specific parts of the journey; key moments in the travel experience. Typically these are when passengers reach the end of a stage in the journey and prepare for the next task ahead.

*Level of emotional intensity versus mean of 100

DEPARTURES – EMOTIONAL INTENSITY HOTSPOTS



External Arrivals



Pre-Departure Gate



Departure Gate



Pre-Security

ARRIVALS – EMOTIONAL INTENSITY HOTSPOTS



Passport Control



Post-Passport Control



Pre-Baggage Claim



External Arrivals



IMPLICATIONS FOR BRANDS:

Creative which taps into the virtue of emotion is likely to be particularly effective at these moments in the journey.

Context can super charge this opportunity, being relevant to the travel moment in time or the traveller mindset.

If brands can adapt creative to fully leverage these emotional peaks, they will **be able to drive a deeper brand connection**.



4

FINDINGS

EXTERNAL LARGE FORMAT
CREATIVE

**WILL PREPARE THE
SUBCONCIOUS FOR
INTERNAL MESSAGING**

Large format sites on the approach are **highly effective** with average peak memory encoding higher compared to the overall study



Average peak detailed memory = 0.82 (+12% vs study average peak)
Average peak global memory = 0.91 (+26% vs study average peak)

IMPLICATIONS FOR BRANDS:

If brands are present on the high performing large format sites on the approach to the airport, it will **prepare consumers' subconscious to be more receptive** to similar creative as they pass through the airport.

Utilising the external assets provides **brands more mental availability** and this is likely to enable the subconscious to **process the creative within the terminal quicker**.

Large format external airports sites also reach drop-off and pickup audiences as well as those travelling through the precinct with impactful communications (win, win).





CREATIVE INSIGHTS

Tailor messaging for specific audience assets to drive deeper connections
– e.g. domestic vs international, departures vs arrivals

Emotionally compelling images are more likely to get a response even with detailed skewed communications

Areas with high emotional intensity can be deciphered more quickly as the brain operates with heightened receptivity

Brands with multiple messages should ensure their brand codes carry over on their creative throughout the airport journey

INFLUENTIAL CAMPAIGNS IN JCDECAUX AIRPORT

1

Airport touchpoints over-deliver memory encoding; building mental availability for brands and driving future consumer behaviour

2

A combination of different airport assets delivers versatility in memory encoding bias reflecting the unique neural-state of the journey

3

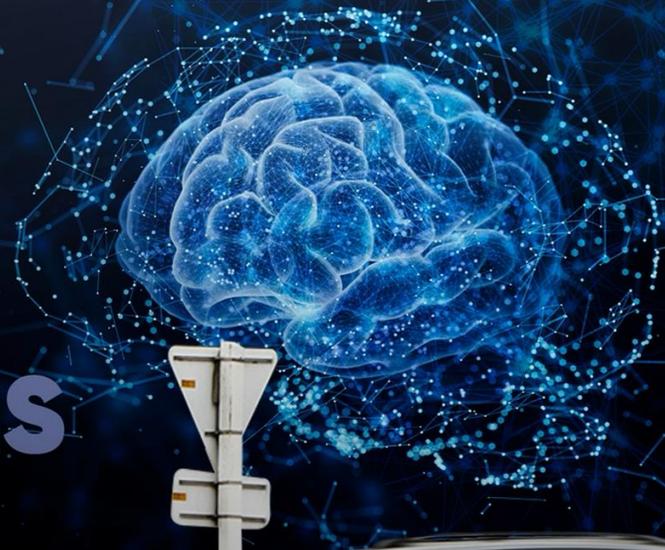
Key airport touchpoints produce high emotional intensity which when taken advantage of will drive stronger detail and deeper connections for brands

4

Brands that utilize the external large format assets will prepare the subconscious to assist decoding creative messaging within the internal terminal precincts

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THANK YOU



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