

RIGHT ANGLE

OUT OF HOME

Brand Awareness

RIGHT ANGLE RESEARCH
APRIL 2009



Methodology and Sample Profile

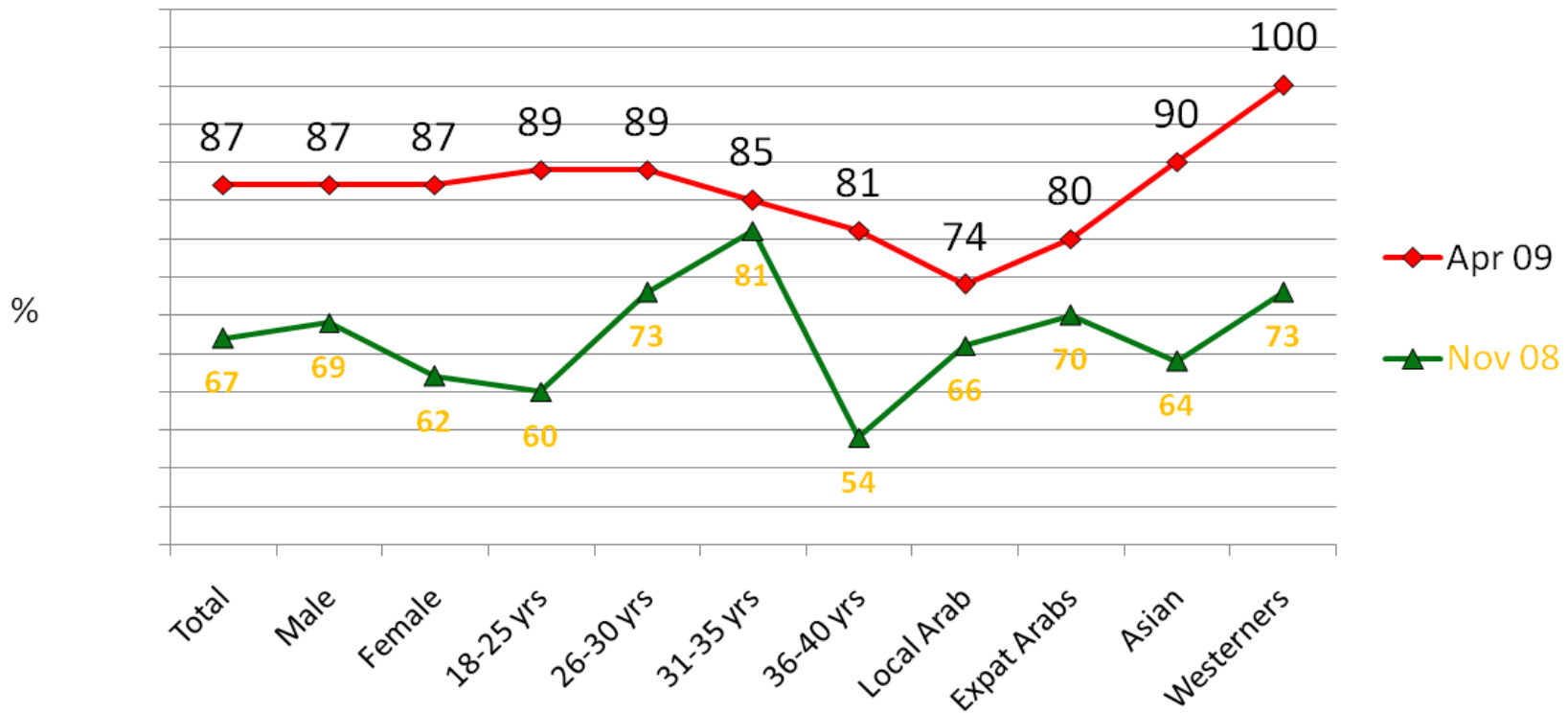
Findings were generated via face-to-face interviews following a fully-structured questionnaire.

- **Study centers** : Dubai
- **Nationality** : All
- **Gender** : Male & Female
- **Age** : 18 - 45 yrs

Total	Male	Female	18-25	26- 30	31- 35	36-40	41-45	Locals	Expat Arabs	Asians	Westerners
250	175	75	45	75	47	47	36	35	60	125	30



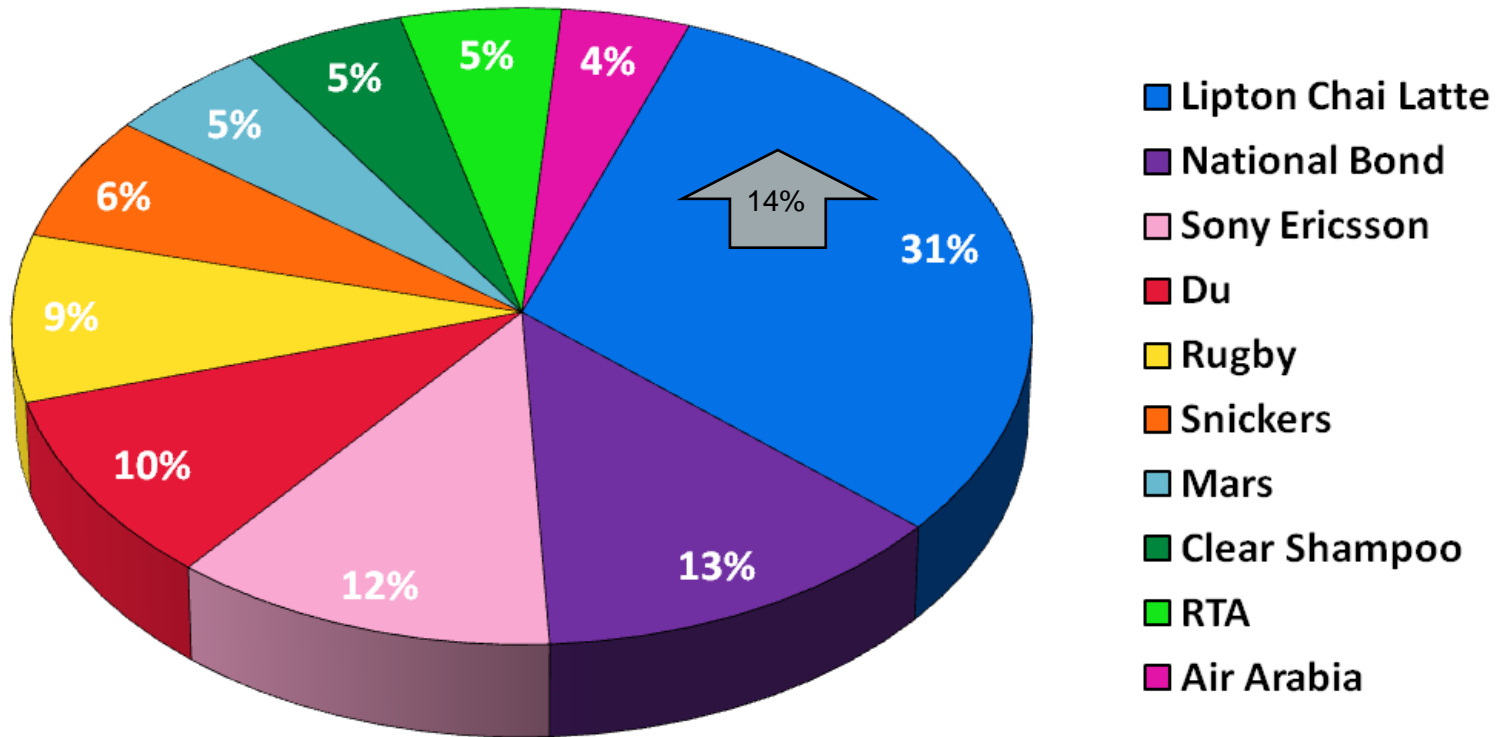
Have you noticed any ads recently on Bus Shelters? (Yes/No)



- A high percentage of respondents claim to have seen a brand advertised on the Bus Shelter with a significant increase versus last wave across all target groups.
- Among 41-45 year old consumers, seeing a brand advertised on Bus Shelters is 89%.



Brands seen recently on Bus Shelters (TOM)

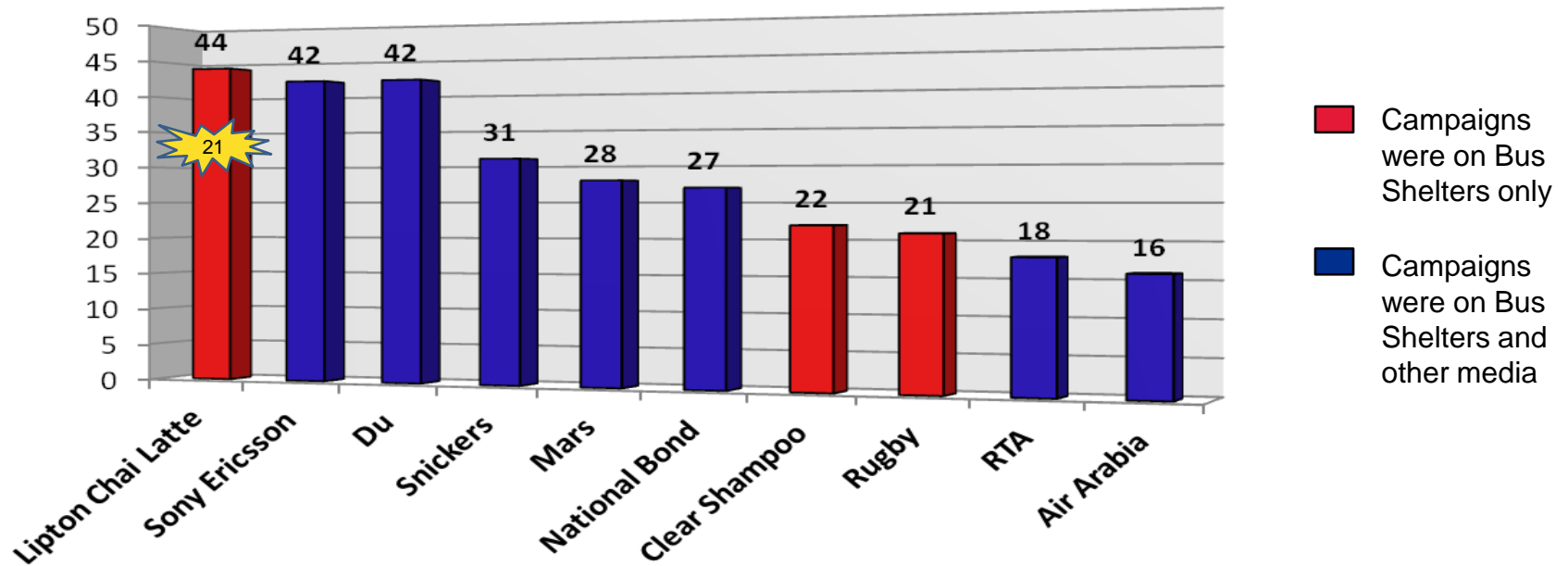


- Lipton enjoys a significantly higher TOM awareness versus last wave across different target groups.
- Other brands enjoy higher TOM of awareness versus other brands mentioned in earlier wave with more brands popping up.
- All brands that achieved TOM were displayed on Bus Shelters

(Numbers in arrows represent research numbers from Nov 2008)



Brands seen on BQS (Total - Unaided)



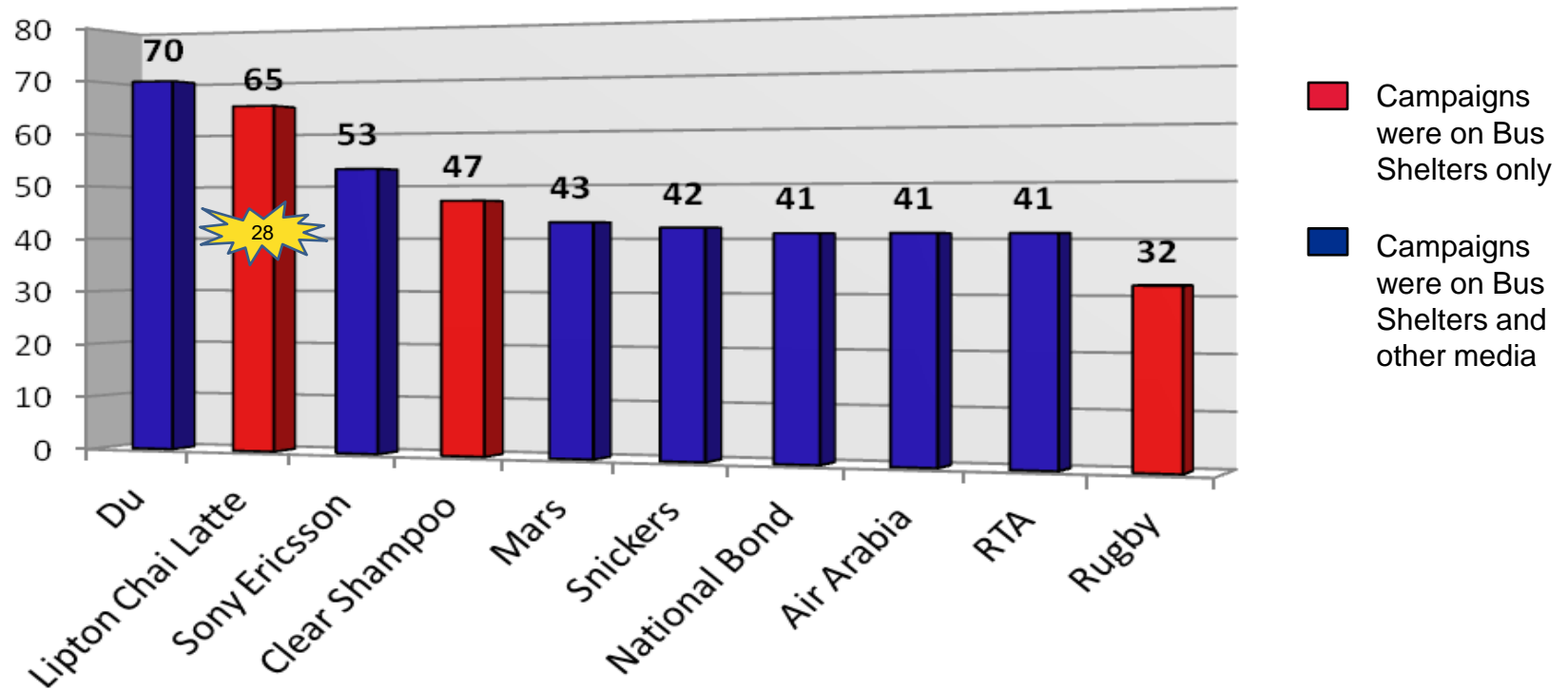
- Lipton enjoys a significantly higher unaided awareness versus last wave across different target groups.
- Lipton practiced a “flighting” method; they ran the Lipton Chai Latte campaign during our first wave of research for one month and achieved a score of 21. After a lull of one month, Lipton Chai Latte again displayed the same campaign in a second burst during our second wave of research and has achieved a total unaided brand recall score of 44.
- Total average unaided recall for brands on BQS in last wave was 24% and total average unaided recall for this wave is 29%.



(Represent research numbers from Nov 2008)



Brands Seen on BQS (Total Aided – without visuals)



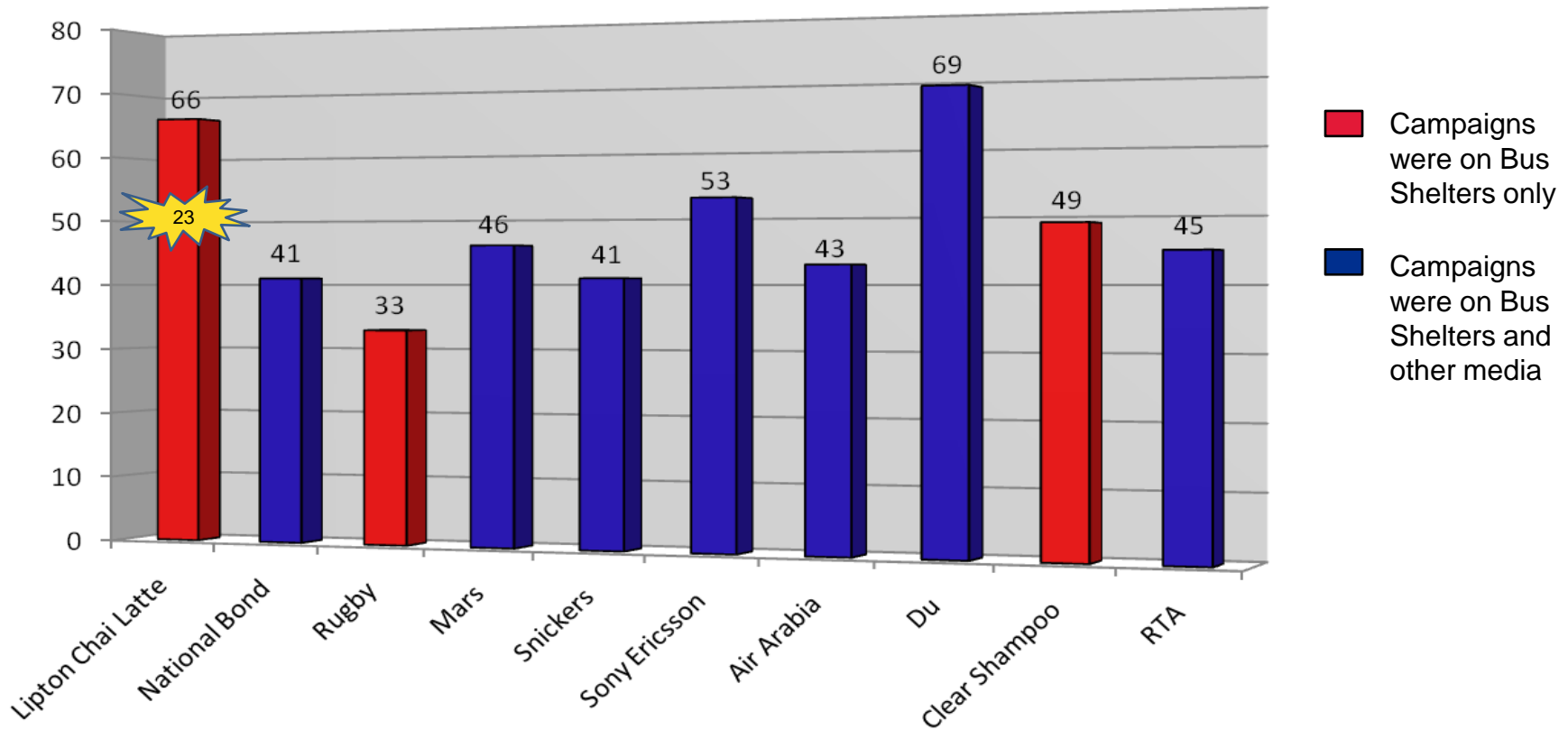
- It is logical to conclude that the medium is effective in generating brand awareness as the above chart shows that respondents were aware of many brands advertised.
- Total average aided recall for brands on BQS in last wave was 35% and total average aided recall for this wave is 48%.



(Represent research numbers from Nov 2008)



Have you seen this visual recently? (Total – Aided, Visually)



- A significant increase of Lipton after showing the ad visuals.
- Du reveals the highest level of awareness.



(Represent research numbers from Nov 2008)