

# JCDecaux AIRPORT 24

RECOVERED, RENEWED AND READY





Airport is a **hero** JCDecaux offering, worldwide

As an expert in airport advertising, JCDecaux aids in the development of hundreds of airports by elevating the passenger experience and offering incomparable communication solutions for brands.

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38

countries

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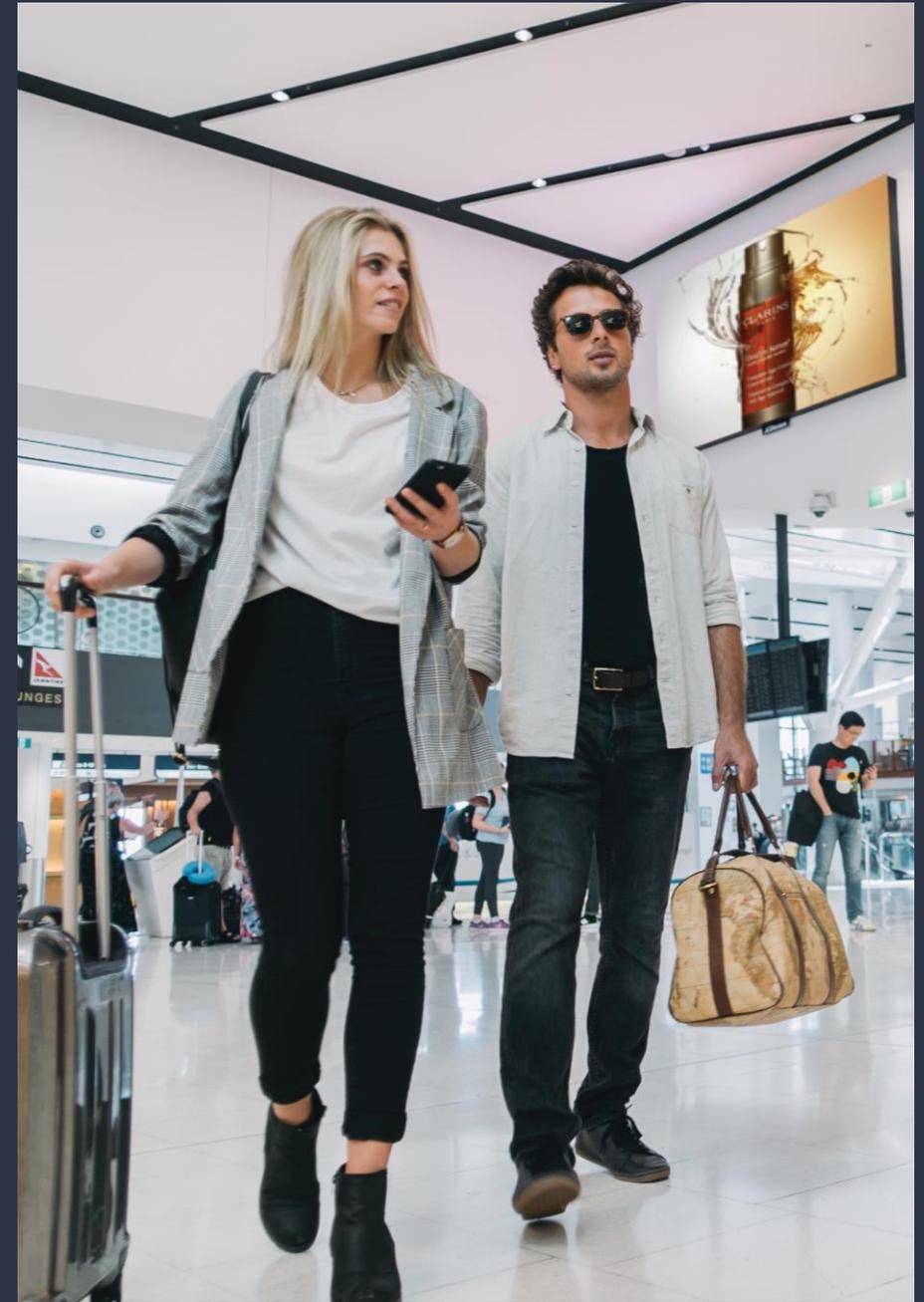
153

airports

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globally since

2005



## **Airport is key part** of JCDecaux New Zealand's portfolio

- Three busy airports – Auckland, Christchurch, Queenstown
- Long established relationships
  - Christchurch since 2007
  - Auckland since 2014
  - Queenstown since 2018

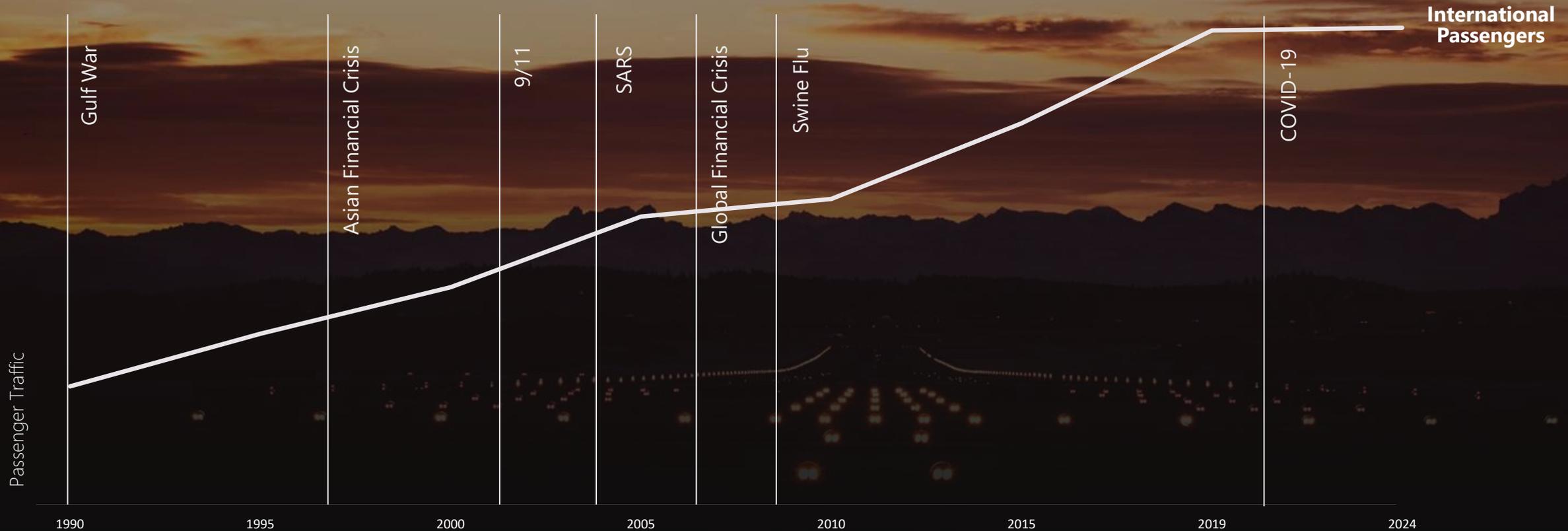


A black and white, motion-blurred photograph of people walking in an airport terminal. The focus is on the lower legs and feet of several individuals, some pushing rolling suitcases. The background is out of focus, showing other people and the floor of the terminal. The overall mood is one of busy, constant movement.

Air travel has experienced many challenges in the last 30 years,  
**few that many could have predicted**

# What we can predict, air travel always recovers

A long term look at growing passenger traffic proves air travel will always recover after crises



# The **post-pandemic recovery** of JCDecaux Airport is complete

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New Zealand  
Airports **restriction  
and mask free for  
all 2023**

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**25.9M**

passenger journeys  
during 2023 though  
JCDecaux Airports

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**Digitisation of  
hero assets**, such  
as baggage claim,  
completed during  
closure

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Airport Mindset  
**Neuroscience  
Study 2023 proves  
emotional impact  
and mindset claims**

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**Increasing services**  
into NZ; direct China  
airlines exceed  
pre-pandemic  
and Queenstown  
embracing  
surging demand

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**Calibre Airport  
Measurement**  
introduced January  
2024; validated  
incremental reach  
opportunity

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Evident advertiser  
confidence; growth  
**+17%** in Q1  
2024



# Demand for air travel is at an **all-time high**

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**Travel fundamental** to many people's happiness; even in difficult economic times, people defend travel budgets



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People are resilient; Kiwis embraced travel **as soon as it was possible**, post Pandemic



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There are **many reasons** why people need or want to travel; these continue despite external factors



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Business **depends on** in-person connections



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Evolution in travel/digital model enables **lower cost opportunities** opening up travel to all



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Advances in medical science and property inflation has created a **healthy ageing population with high net-worths**



# 26M passenger journeys through JCDecaux Airport in 2023 and continuing to build in Q1 2024



# JCDecaux AIRPORT 24



REFRESHED INSIGHTS FOR A NEW ERA IN AIRPORT



## JCDecaux Intelligence **Airport Study**

Methodology:

N = 750 kiwis 95% confidence

Kiwis that have travelled through a NZ Airport in last 12M (March 2023 to March 2024)

Those who live in NZ only (international travellers not in survey sample)

Post pandemic deep dive to understand behaviours in airports and psychographics of Airport Audience day to day

Updated insights for advertisers to enable optimal outcomes

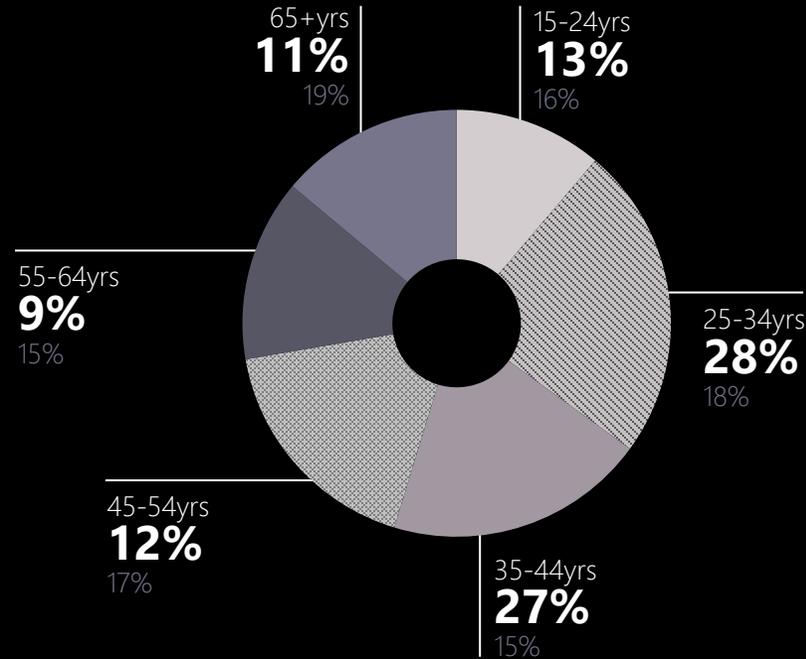


A **ROBUST PANEL**;  
SIMILAR TO THE  
NATIONAL POPULATION

• Pureprofile NZ (February 2024)

Panel = 135,000

## AGE



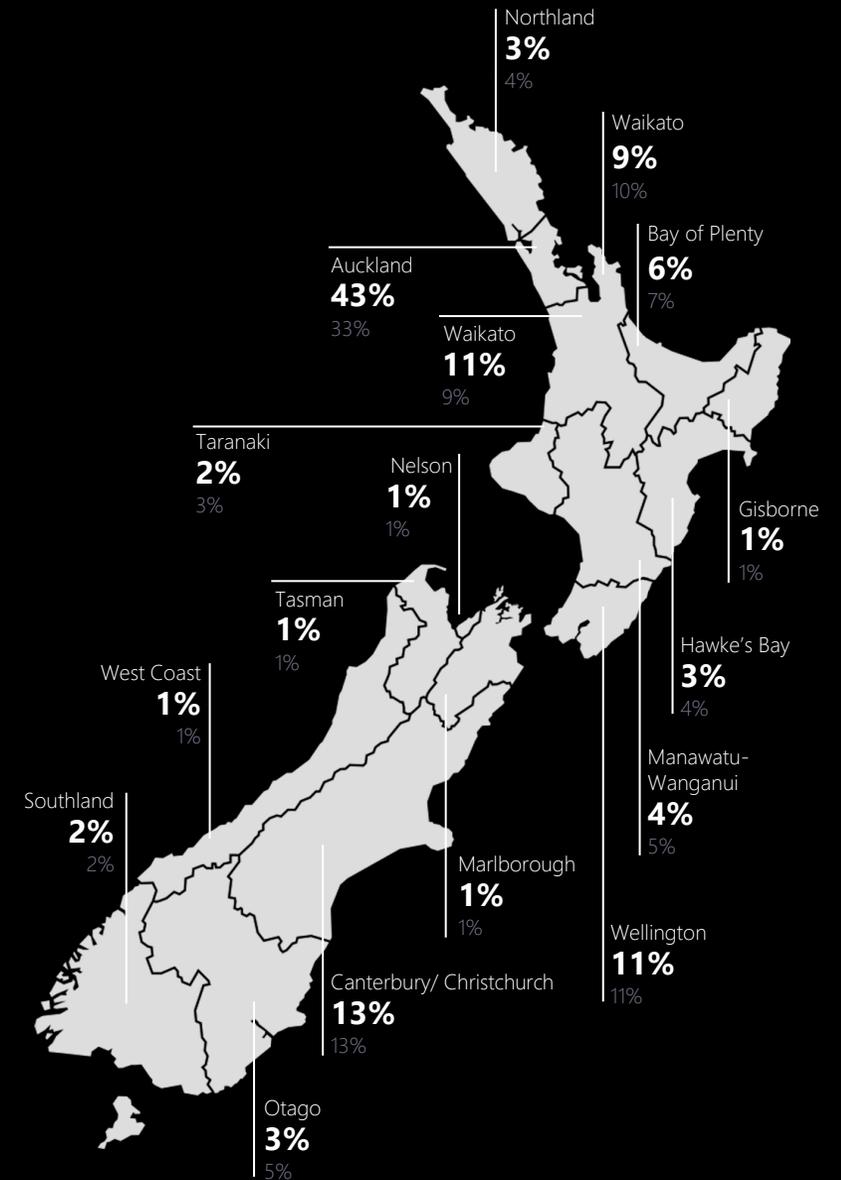
Male  
**45%**  
49%



Female  
**55%**  
51%

## GENDER

## REGION



# JCDecaux AIRPORT 24



## INSIGHTS

### **Airport Audience:**

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Proving the mass reach opportunity and highlighting valuable segments within the mass

### **Airport Behaviours:**

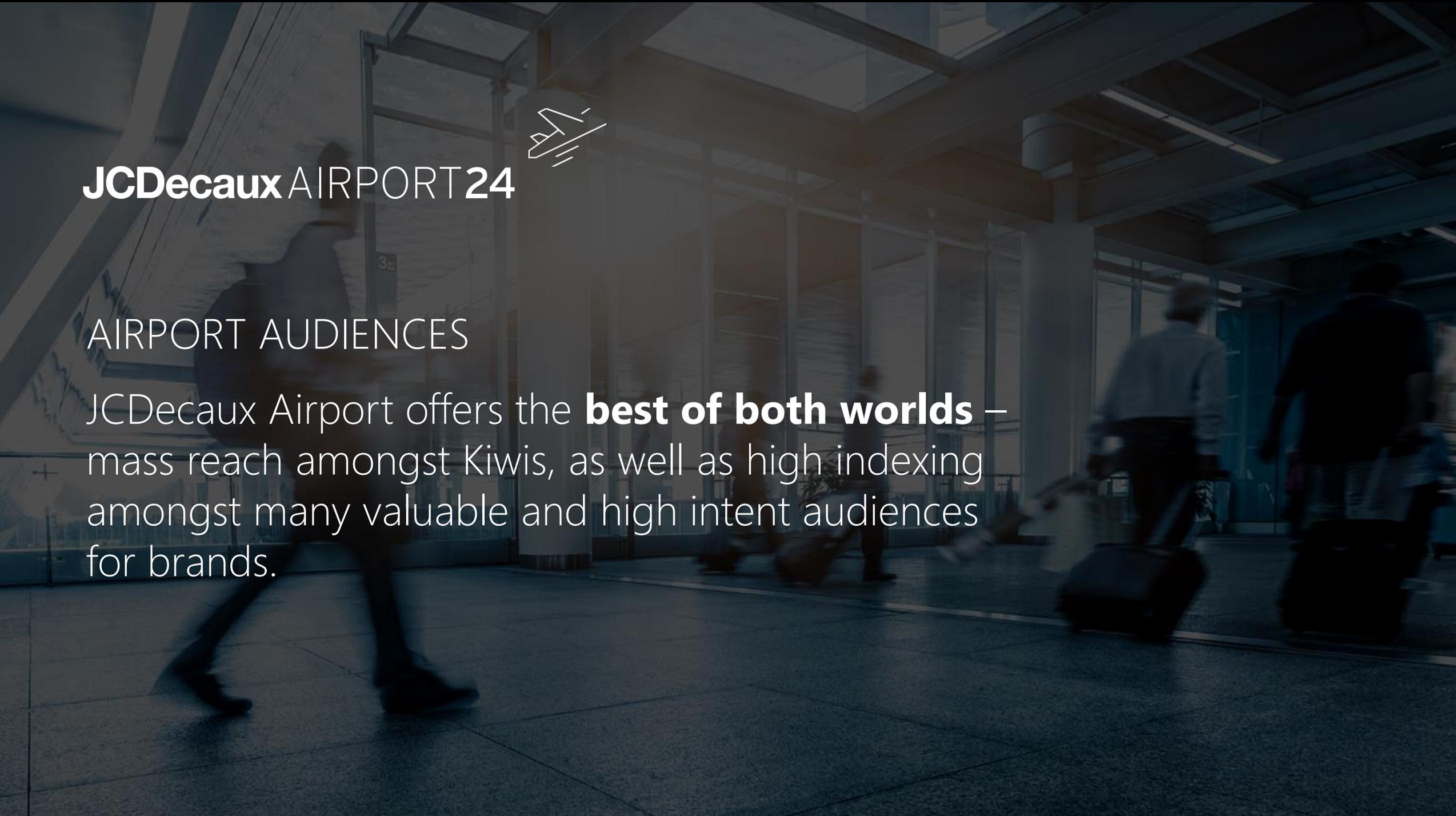
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Updated stats regarding frequency, dwell, mindset and spend

### **Advertising Receptivity:**

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Evidence of receptivity, as a result of the airport mindset, and opportunities for advertisers



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## AIRPORT AUDIENCES

JCDecaux Airport offers the **best of both worlds** – mass reach amongst Kiwis, as well as high indexing amongst many valuable and high intent audiences for brands.

| LET'S START WITH A LITTLE DEMONSTRATION...

**Who in the room** has travelled through an NZ airport in the last 12M?

- Raise left hand domestic
- Raise right hand international
- Stand up if both
- Stand up and on one foot if you've travelled by air <3 times





Airports are **an opportunity for reaching 'the masses'**

People travel for many reasons; **Airport reaches every kind of Kiwi consumer**

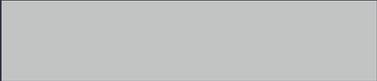




Airports host **a huge number** of Kiwis

67% | = 3.4M<sub>Kiwis</sub>

respondents have travelled through at least one NZ airport in the last 12M  
(April 23 to March 24)

Domestic only  **52% | = 2.6M**

International only  **25% | = 1.3M**

Domestic and International  **23% | = 1.1M**

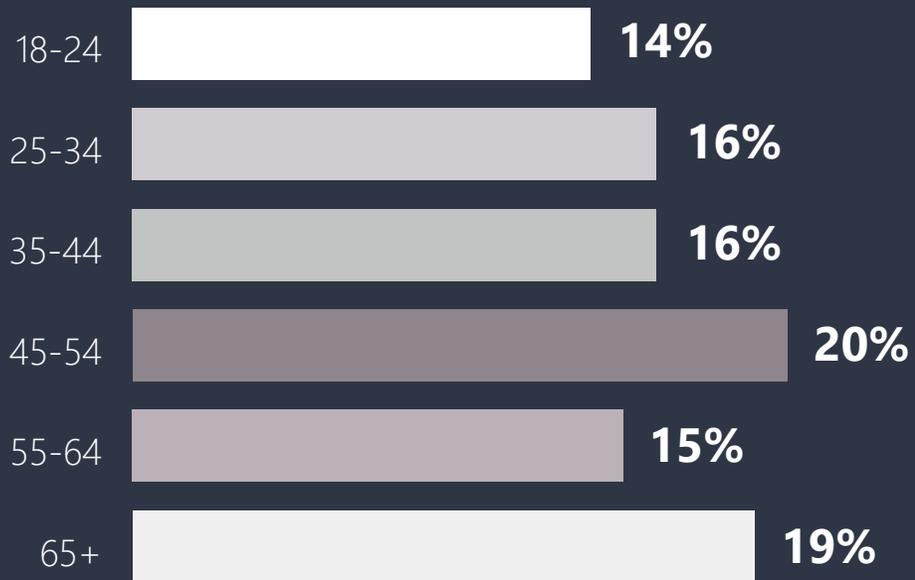


# JCDecaux AIRPORT 24

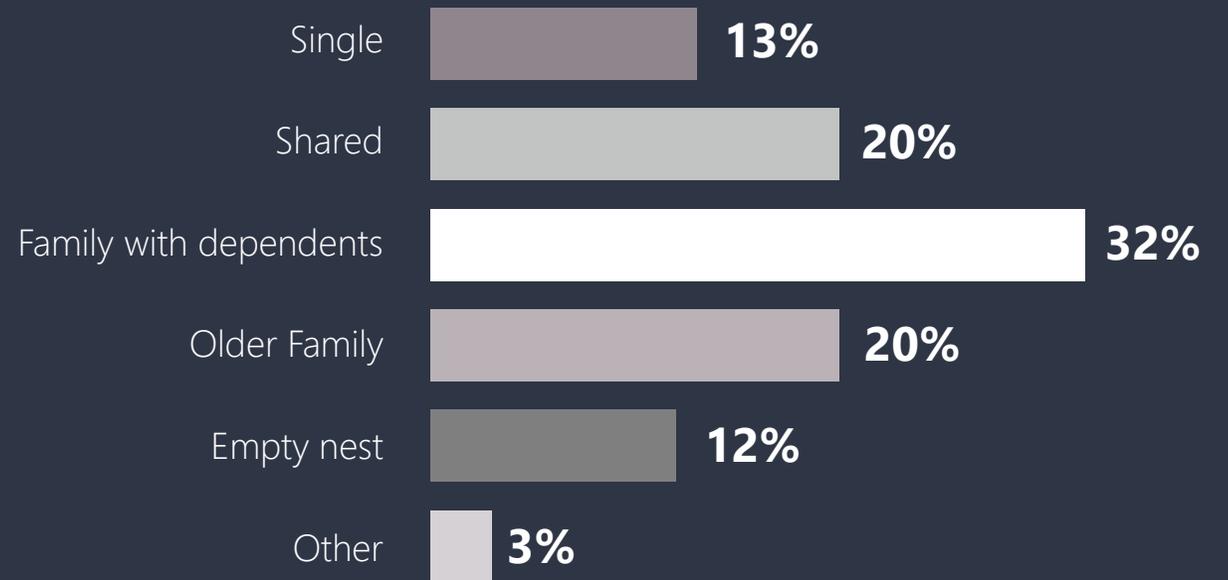
## A DEMOGRAPHIC SNAPSHOT

Demographics are very similar to the total population or a roadside campaign.

### Age



### Household



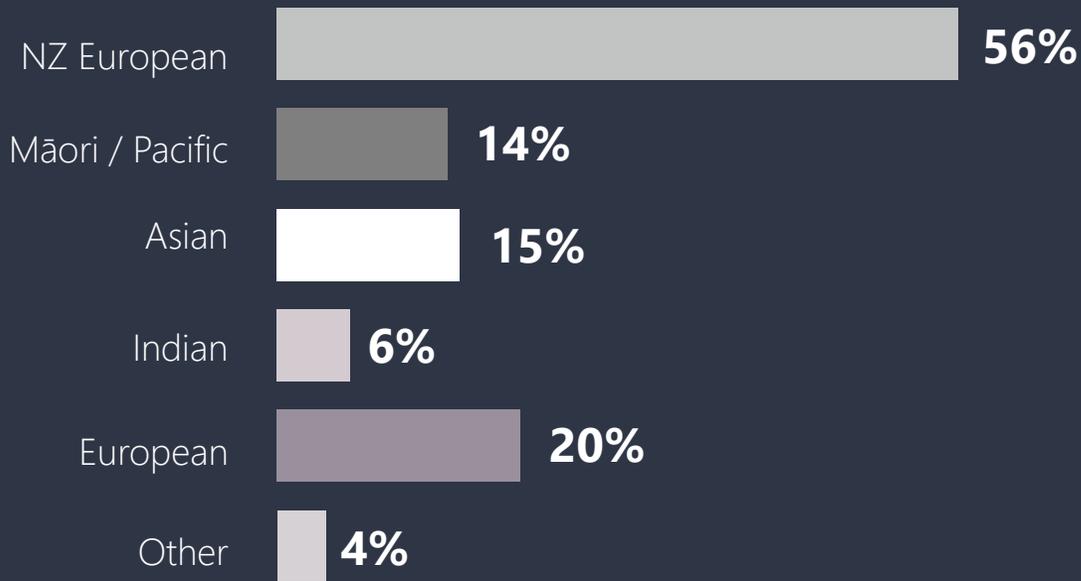


# JCDecaux AIRPORT 24

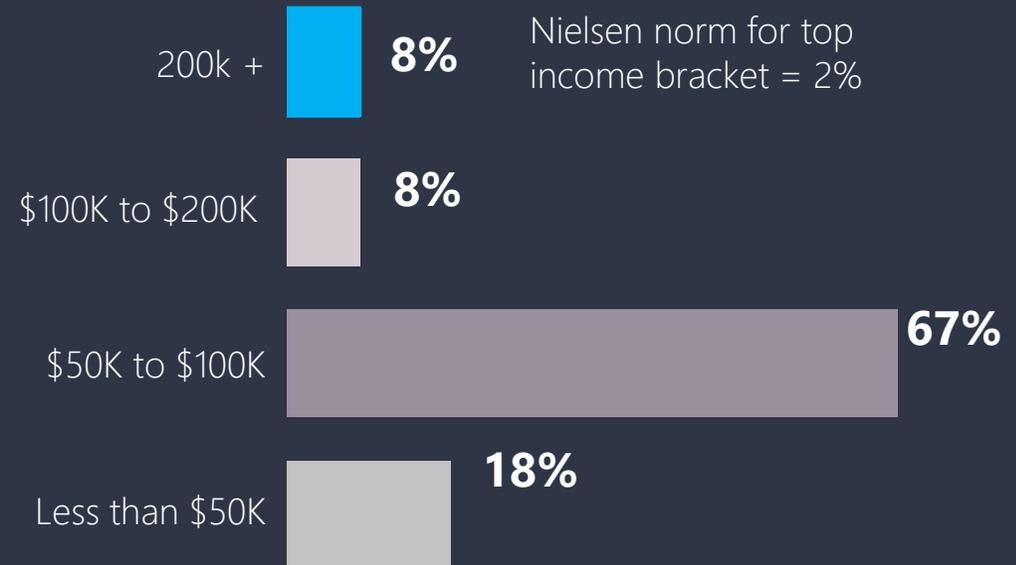
## A DEMOGRAPHIC SNAPSHOT

The noteworthy demographic where Airport over indexes is household income, reaching a more affluent group by age, ethnicity and household.

### Ethnicity

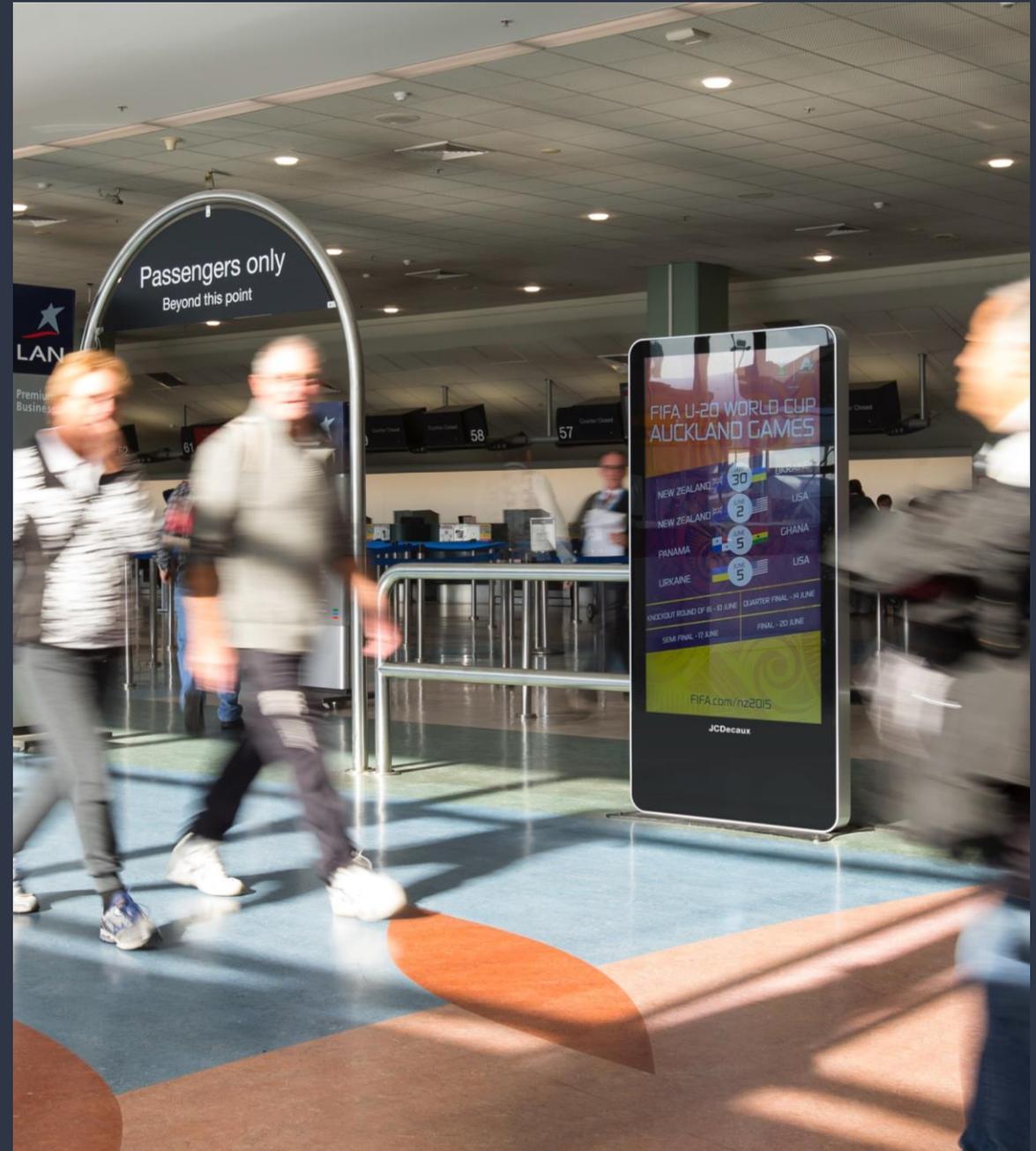
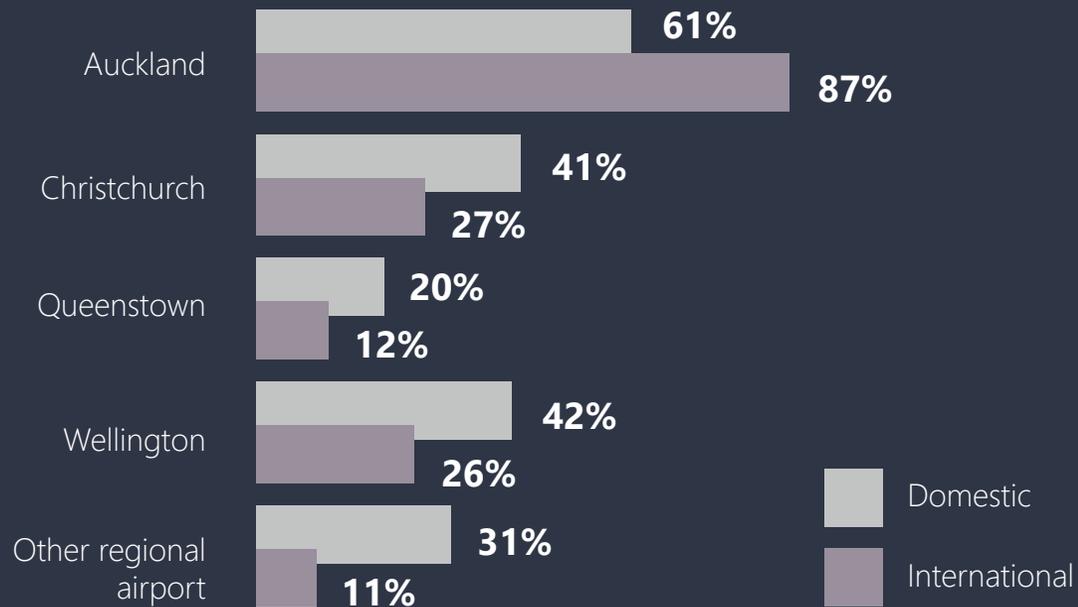


### Household income



# JCDecaux's Auckland Airport is the busiest New Zealand airport

Which NZ airports have you travelled through?





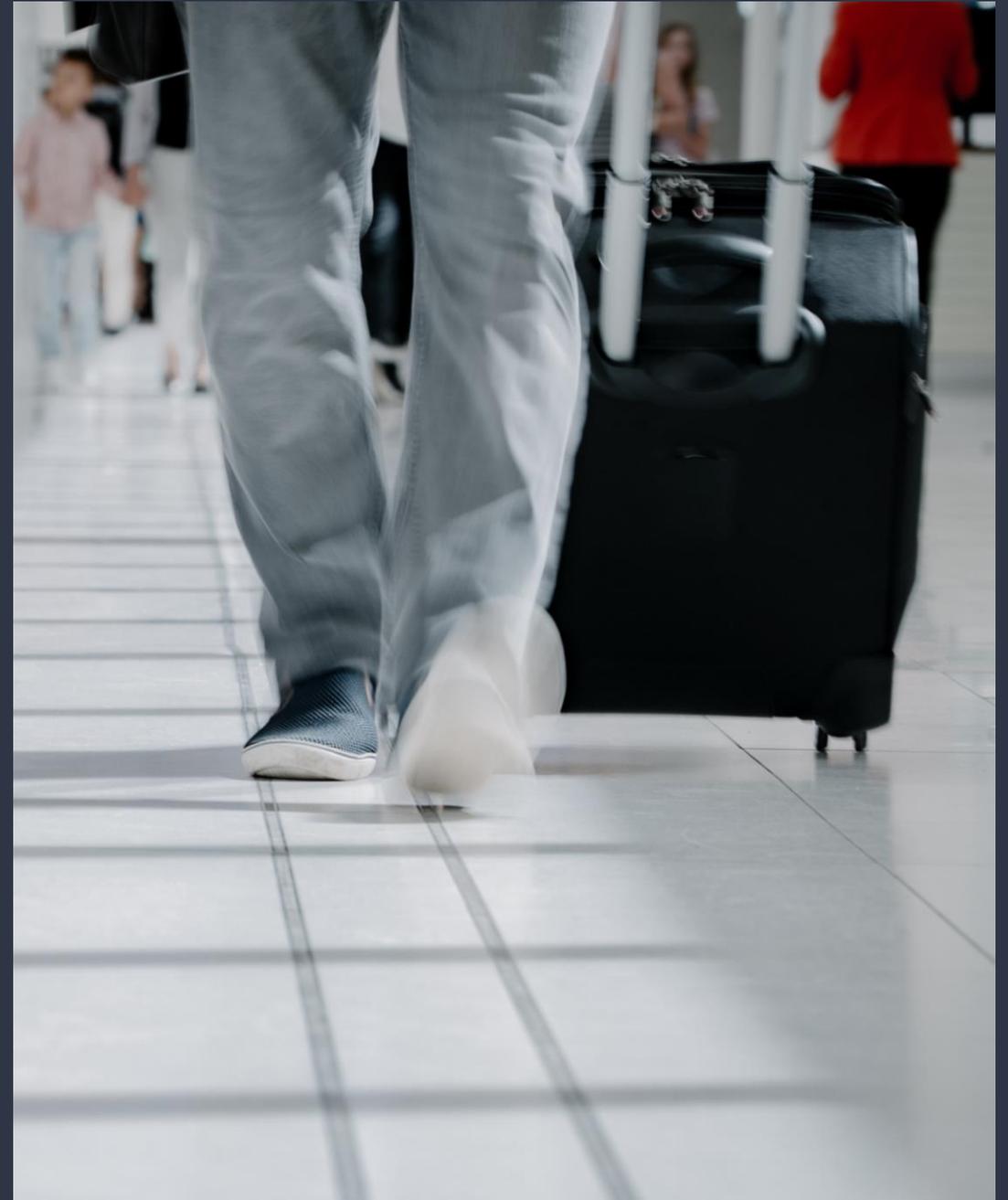
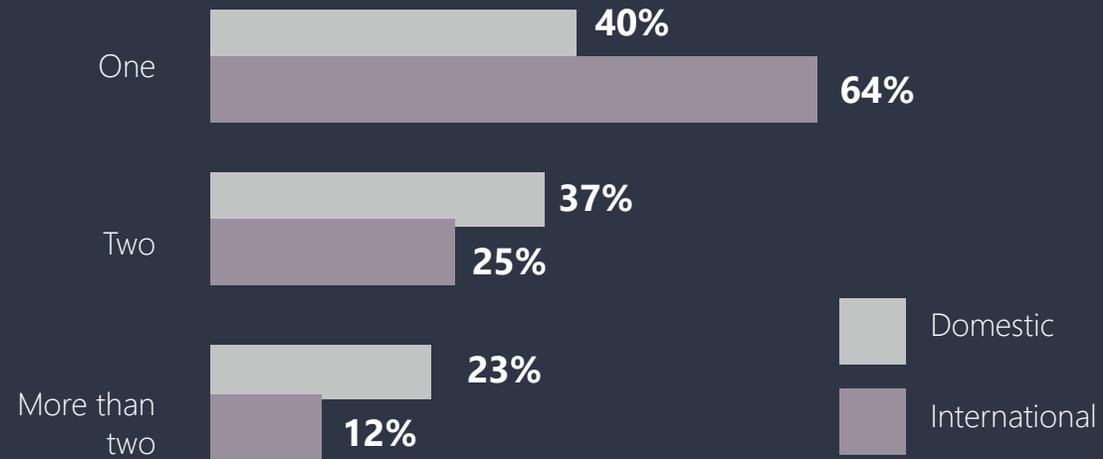
JCDecaux's Airport's deliver **more than two thirds of NZ Airport reach**

68% | = 2.3M<sub>Kiwis</sub>

of all air travel by Kiwis is through a JCDecaux Airport

# The **opportunity** of frequency

How many air trips have you taken in the last 12M?



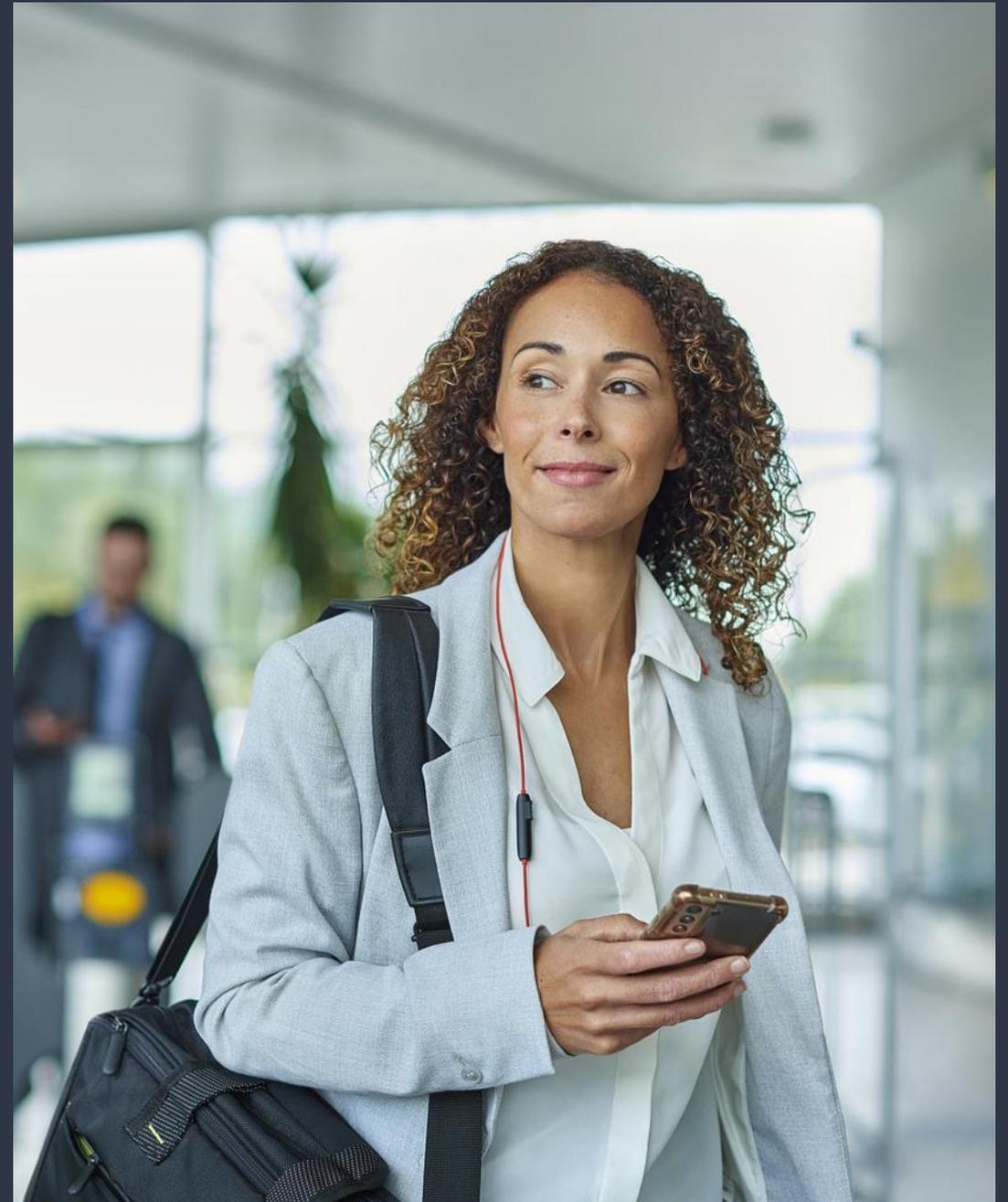
The **opportunity** of frequency

49% | 2.5M

travelled through a New Zealand airport twice

18% | 920K

travelled through a New Zealand airport <twice





## The **benefits** of frequency

Airport offers a high frequency opportunity for effective brand story-telling

**Multiple trips** during a year by a significant number of Kiwis

**Multiple moments** during a condensed journey

>50% trips return, creating a **repeat opportunity** with a campaign



## **The opportunity**, amongst the mass

This study highlights skews within the mass Airport Audience that makes it a unique and valuable environment and opportunity to many Kiwis brands, especially when we consider higher frequencies.

Penetration and spend in high value categories by airport audiences tend to be significantly higher than Nielsen averages, as does switch intent for services.





Airport audiences are **keen consumers**

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89%

say they make most of the household purchase decisions

RISES TO

---

91%

for repeat airport visitors

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45%

say they are avid advisers to others on purchases

RISES TO

---

49%

for repeat airport visitors



Airport audiences are **avid spenders**  
**across a range of categories**

Purchased in the last 12 months:



20%

New  
petrol car



9%

Electric/  
hybrid car



10%

Investments  
over \$10K



31%

Home  
electronics



42%

Personal  
electronics



32%

Home  
whiteware



25%

Jewellery /  
watch

Airport audiences are **interested and engaged consumers**;  
audiences we see on roadside briefs everyday

Those who claim they are:



62%

Early  
adopters  
of tech



58%

Committed  
eco-  
consumers



94%

Value seekers



76%

Foodies



74%

Financially  
savvy

Airport audiences **have strong priorities** that influence spend and behaviour

Those who claim they are:



57%

Career focused



86%

Family focused



57%

Appearance focused



72%

Health conscious



72%

Home proud or DIYers



63%

Outdoorsy & active



Airport audiences are experiencing **life events**  
**that require investment and purchases**

In the last 12 months:



10%

Started a  
new job



12%

Got married  
or welcomed  
a new child



19%

Undertook a  
significant  
renovation



6%

Bought or  
sold property



8%

Undertook  
uni study or  
professional  
development



36%

Planned a  
significant  
travel  
experience



Airport audiences are **high intent switchers**



52%

say they are considering switching at least one service in the next 6 months

RISES TO

55%

for repeat airport visitors

Airport audiences are **open to and in-market for service switching** a range of services

Those intending to switch in next six months:



19%

Mobile



23%

Broadband



21%

Power



15%

Insurance



10%

Mortgage



10%

Kiwisaver



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## AIRPORT BEHAVIOURS

Airport transit offers a range of unique suspended moments; **Airport dwell, intent and mindset are an opportunity for brands** looking to influence in the moment, and for the future

## The **majority** of **air travel is for leisure**

83%

**Travel for leisure** share  
(Both domestic and international)

TOP DESTINATIONS:

1. New Zealand
2. Australia
3. USA
4. Fiji
5. Singapore



During leisure travel, people are in a relaxed and excited mindset, which helps with advertising receptivity

## Business travel is back

17%

**Travel for business** share  
(Both domestic and international)

TOP DESTINATIONS:

- |                |              |          |
|----------------|--------------|----------|
| 1. New Zealand | 2. Australia | 3. USA   |
| 4. Singapore   | 5. UAE       | 6. China |



Face to face connections are critical to business; this mode of travel was first to return post Pandemic

Close to 2019 share (19%), despite economic headwinds

Same share for domestic and international highlights how much business travel is short haul

# Kiwis like to arrive early when travelling

DOMESTIC

50%

arrive > 1 hour  
ahead of flight time

**Only 3%** aim for  
final check in time

**Suspended dwell** is one of the unique airport opportunities  
that can be embraced for effective campaign outcomes

INTERNATIONAL

53%

arrive > 3 hours  
ahead of flight time

**Only 1%** aim for  
final check in time



**88% of passengers purchased something**  
whilst at the airport, during their last trip

63%

Purchases un-planned,  
representing an opportunity  
for brands to influence  
spontaneous consumption

DURING YOUR LAST TRIP, DID YOU PURCHASE?



Food – meal or snack

60%

domestic

74%

international



Store / boutique

24%

domestic

56%

international



Alcoholic drink

14%

domestic

27%

international



Non-Alcoholic drink

68%

domestic

73%

international

During dwell, **devices are used to explore and plan**

Understanding digital habits during dwell moments enables brands to influence potential customers during suspended moments

DURING YOUR LAST TRIP, WHAT DID YOU DO WHILST WAITING TO BOARD?



Scrolled through phone, generally

92% domestic  
89% international



Downloaded app/  
content for trip/ flight

34% domestic  
42% international



Planned activities/  
accommodation for trip

51% domestic  
57% international



Researched products advertised  
in airport/ planning to buy

16% domestic  
27% international

## Spending intent is high during air travel

The airport mindset has been proven to increase spending propensity

Brands can influence people whilst contemplative, self-actualised and receptive

I feel like my best self when travelling through an airport

47% domestic  
38% international

I am more likely to buy things on impulse or treat myself when travelling

36% domestic  
37% international

The airport is a rare pause moment where I contemplate life improvements or future purchases

31% domestic  
20% international

I am less price sensitive at the airport

32% domestic  
28% international

# Kiwis do not typically pack light!

Did you check in a bag?

DOMESTIC

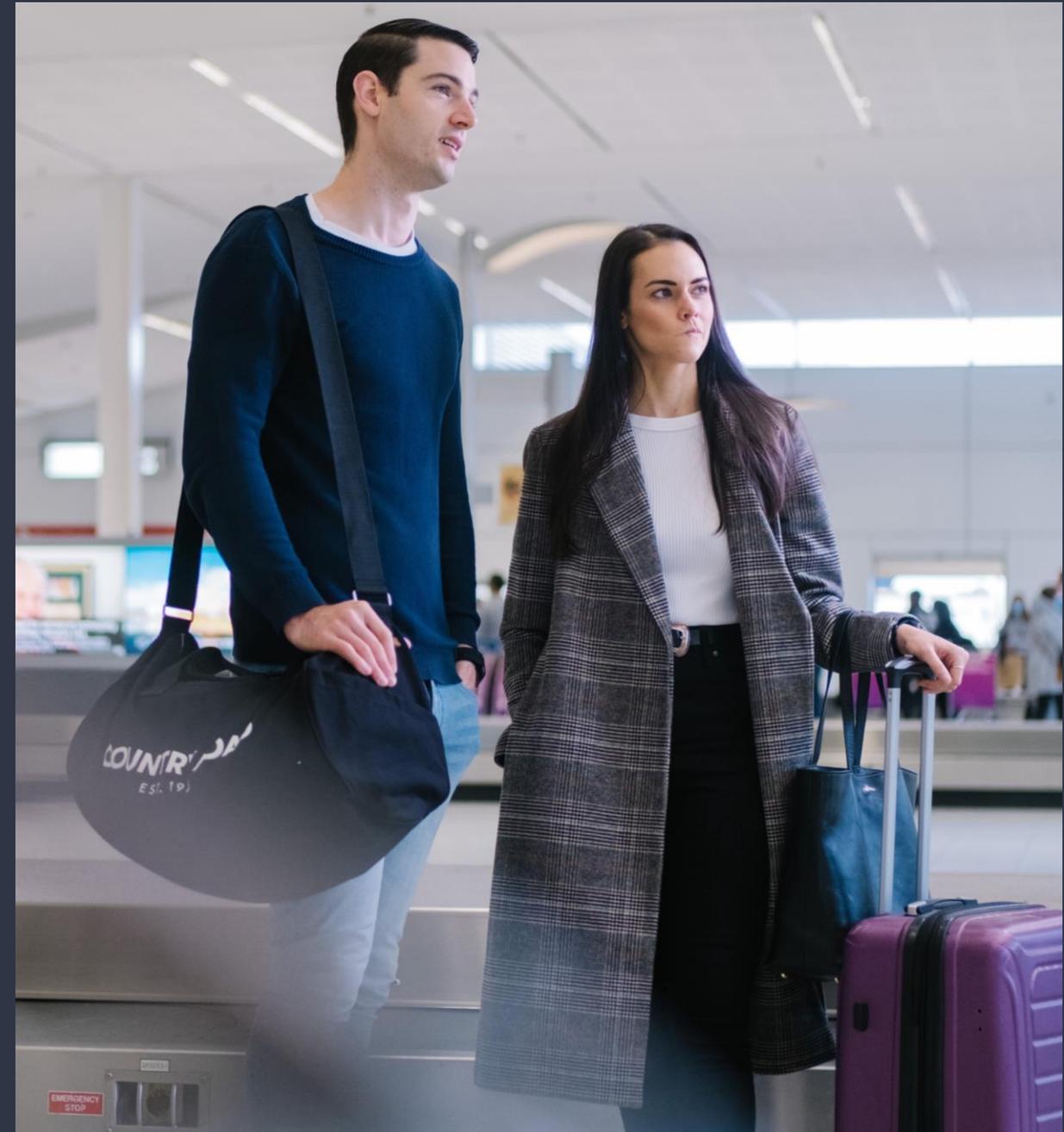
73%

INTERNATIONAL

96%

Baggage claim, with capability for full-motion creative, can be leveraged for incremental reach of AV assets.

Dwell time around baggage claim mostly exceeds 5 minutes.





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## ADVERTISING RECEPTIVITY

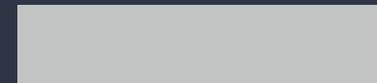
JCDecaux Airport advertising is seamlessly a part of any airport journey; **advertising is welcomed and recalled, and therefore effective** in the moment, and into the future.



**Airport advertising is effective**  
because people notice it in the  
moment and recall it, later

Do you remember seeing advertising in or around the  
airport during your last trip?

Domestic  
Ad recall



**46%**

International  
Ad recall



**54%**

Nielsen norms  
for Out-of-  
Home recall:

**37%**  
billboards

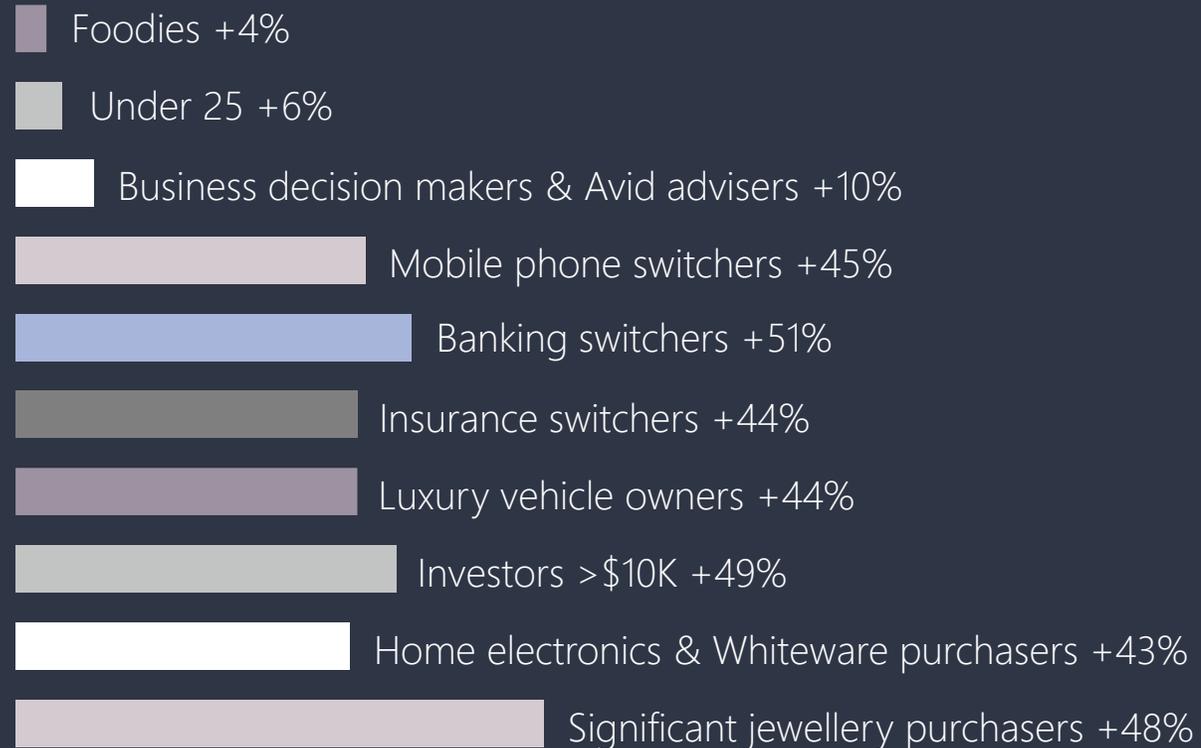
**28%**  
bus shelter

**36%**  
bus

# Segments that **over index for domestic** Airport advertising recall



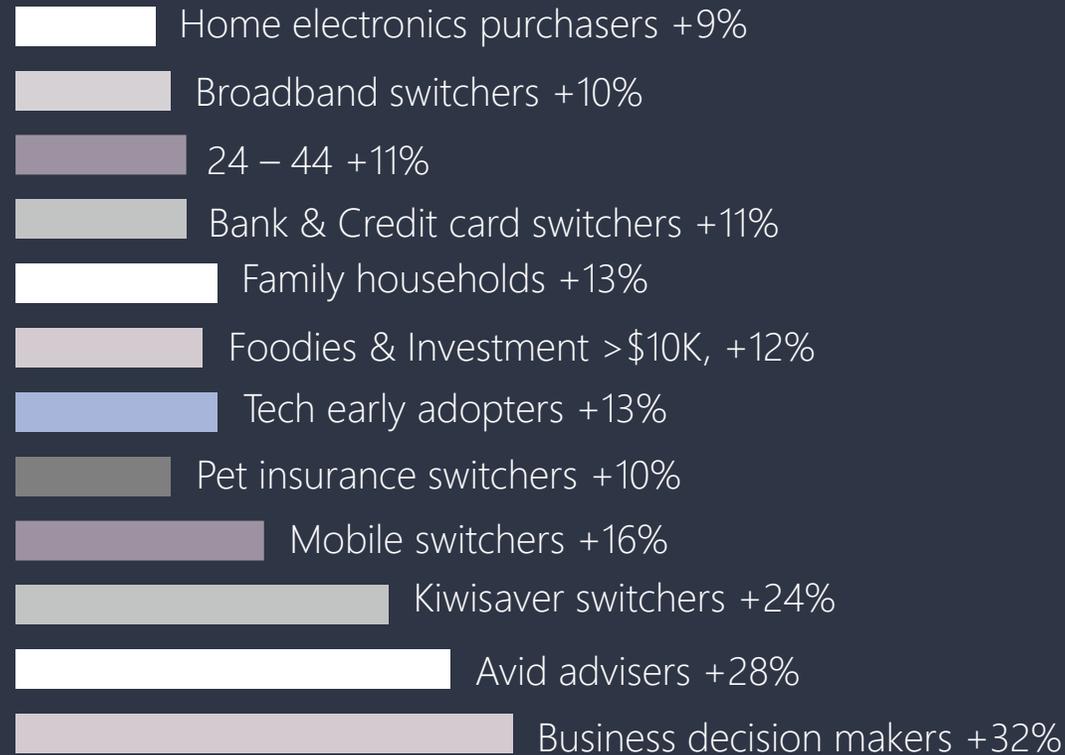
46% recall domestic airport advertising (all Airport)



Segments that **over index for international** Airport advertising recall



54% recall  
international  
airport  
advertising  
(all Airport)



Baggage claim offers **dwell**, **higher engagement** and **video** opportunities.

Did you check in baggage on your last trip?

When waiting for baggage to be unloaded, do you look at content on the baggage screens?

### Domestic

73%  
checked in a bag

62%  
recall watching  
the screens

### International

96%  
checked in a bag

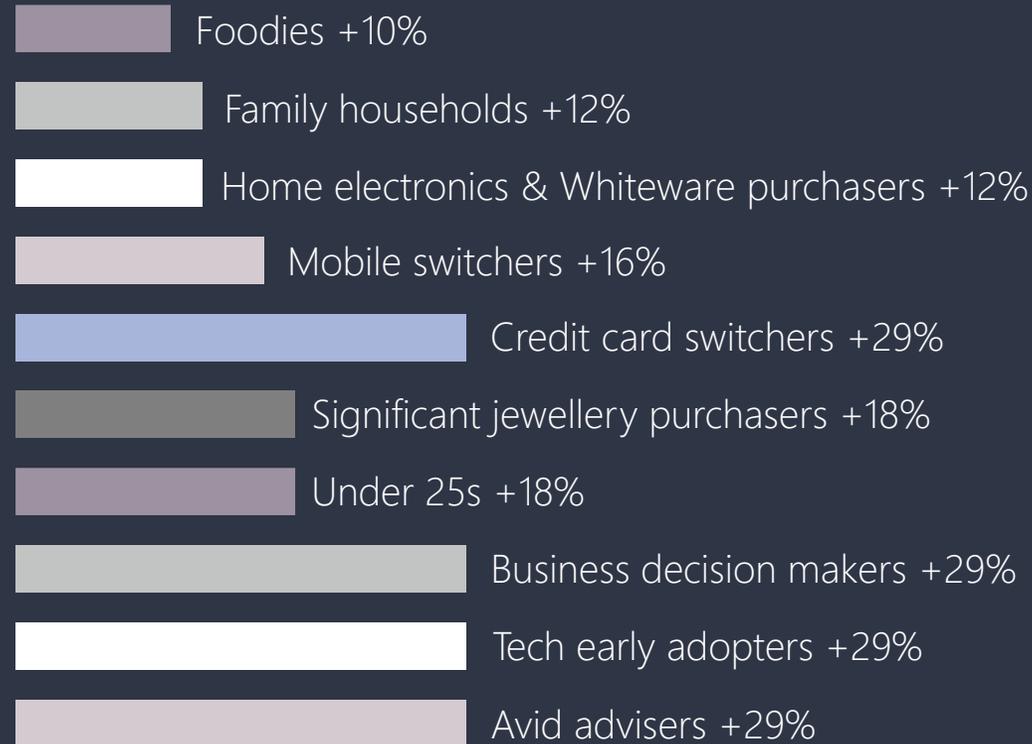
73%  
recall watching the screens



Segments that **over index for domestic baggage claim** advertising recall



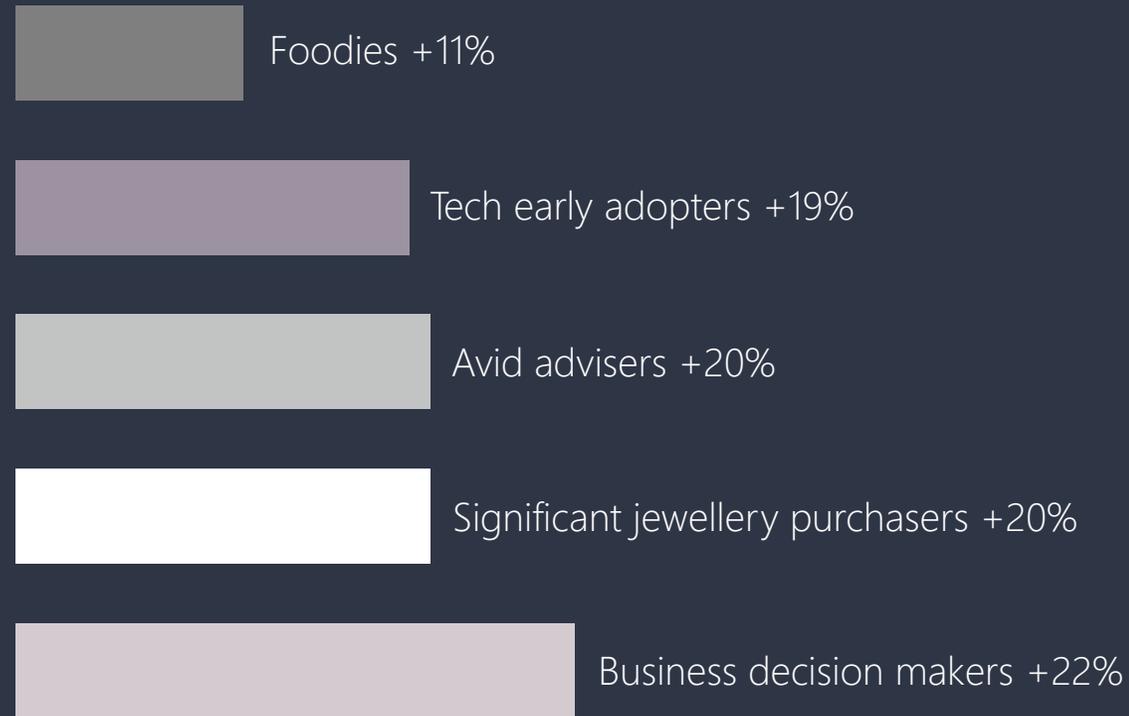
62% recall domestic baggage claim screens (all Airport)



Segments that **over index for international baggage claim** advertising recall



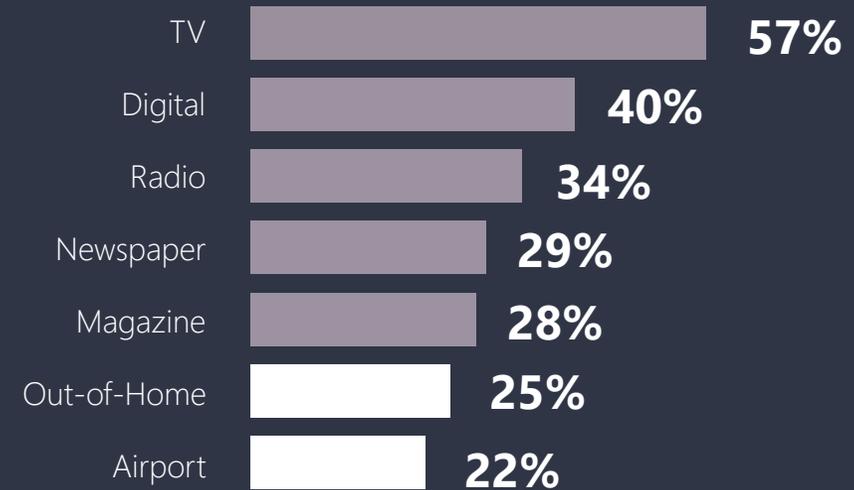
73% recall international baggage claim screens (all Airport)





**Advertising is appreciated** as part of the airport experience; it is the least avoided advertising medium

Which advertising do you actively choose to try and avoid?



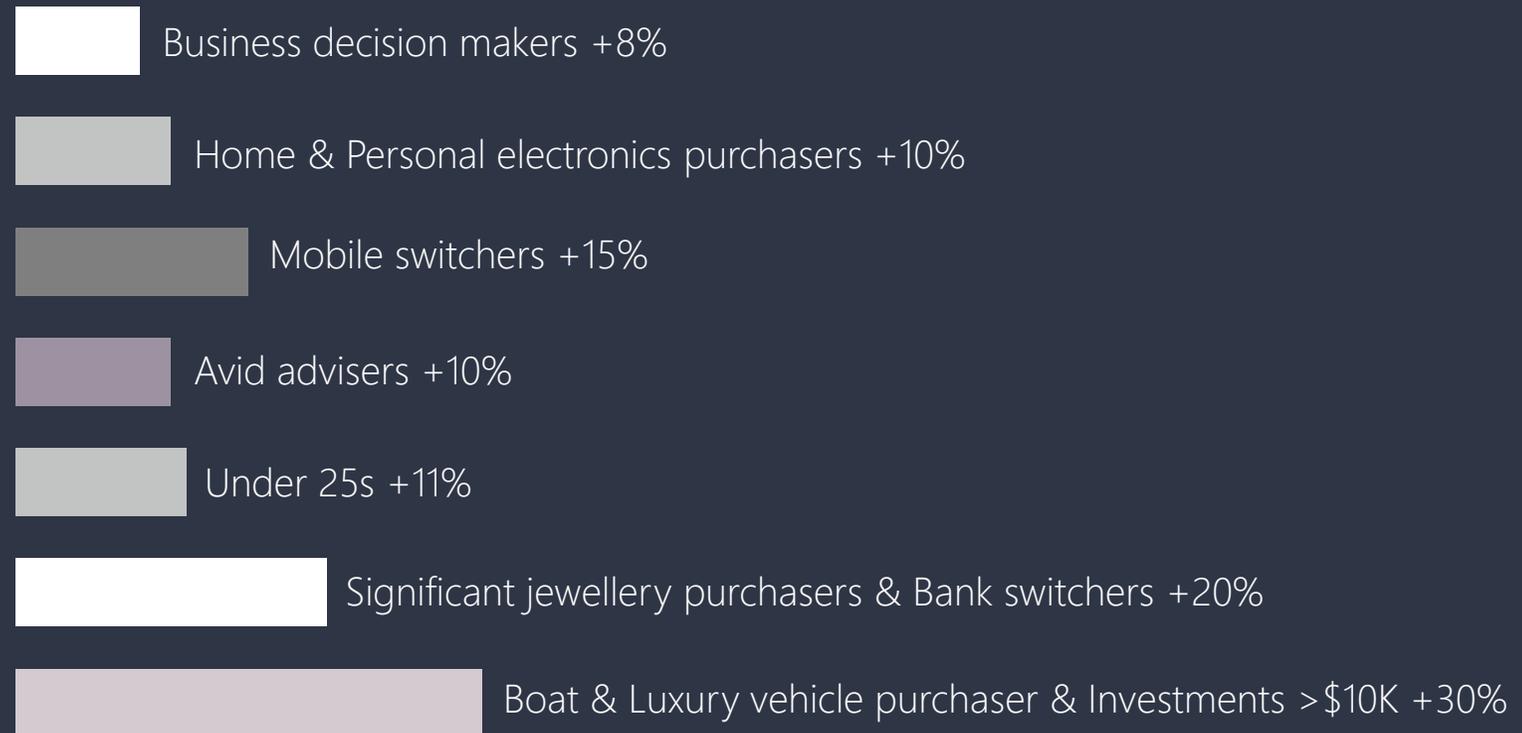
**45%** enjoy advertising more at the airport, as it adds to the experience

# Segments that **over index for enjoyment of airport advertising**



45%  
enjoy airport  
advertising

(All Airport)



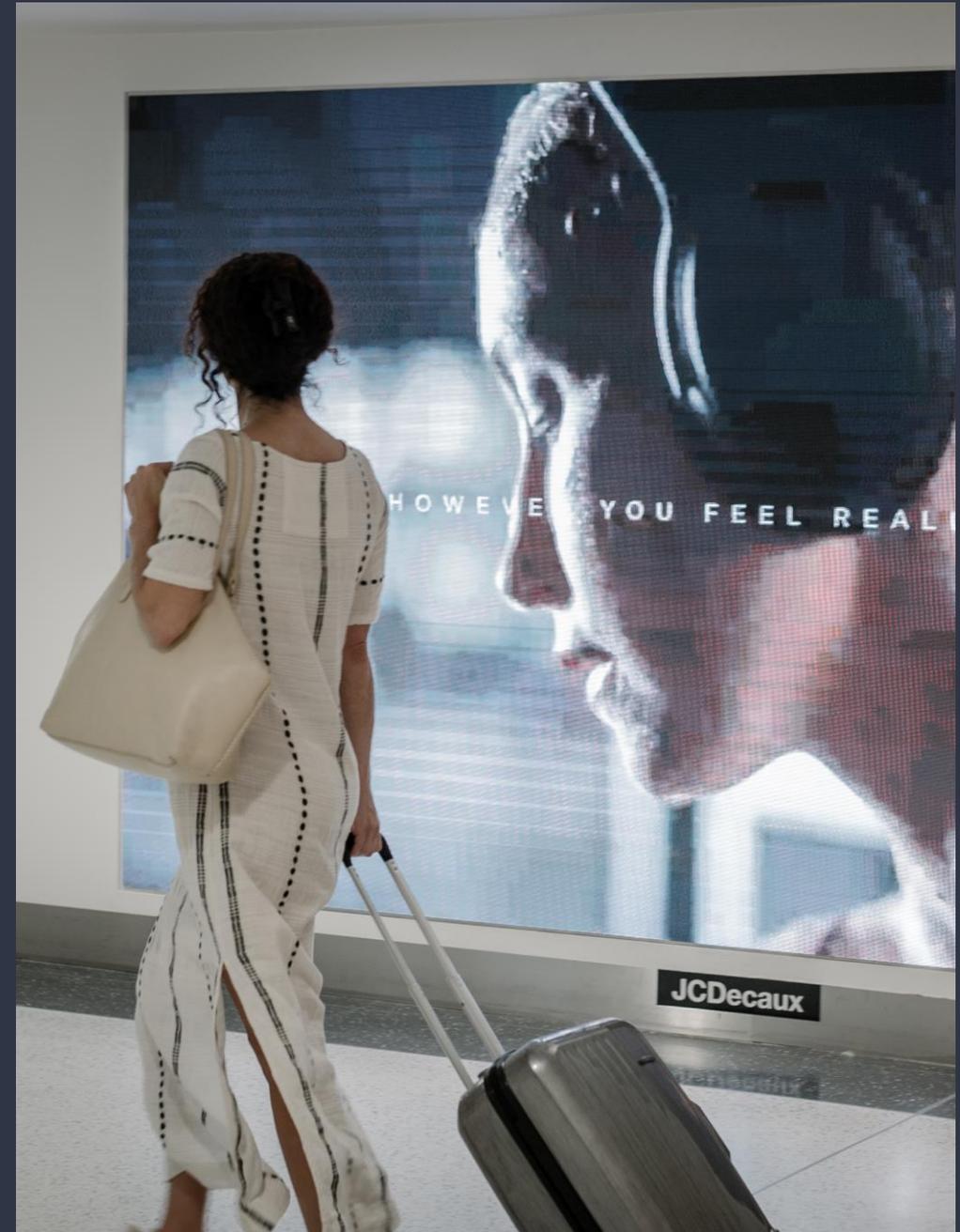
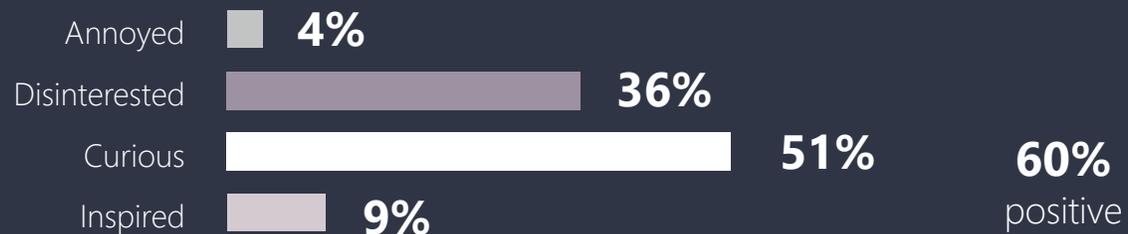
Kiwis are mostly **curious** about Airport advertising; very little annoyance.

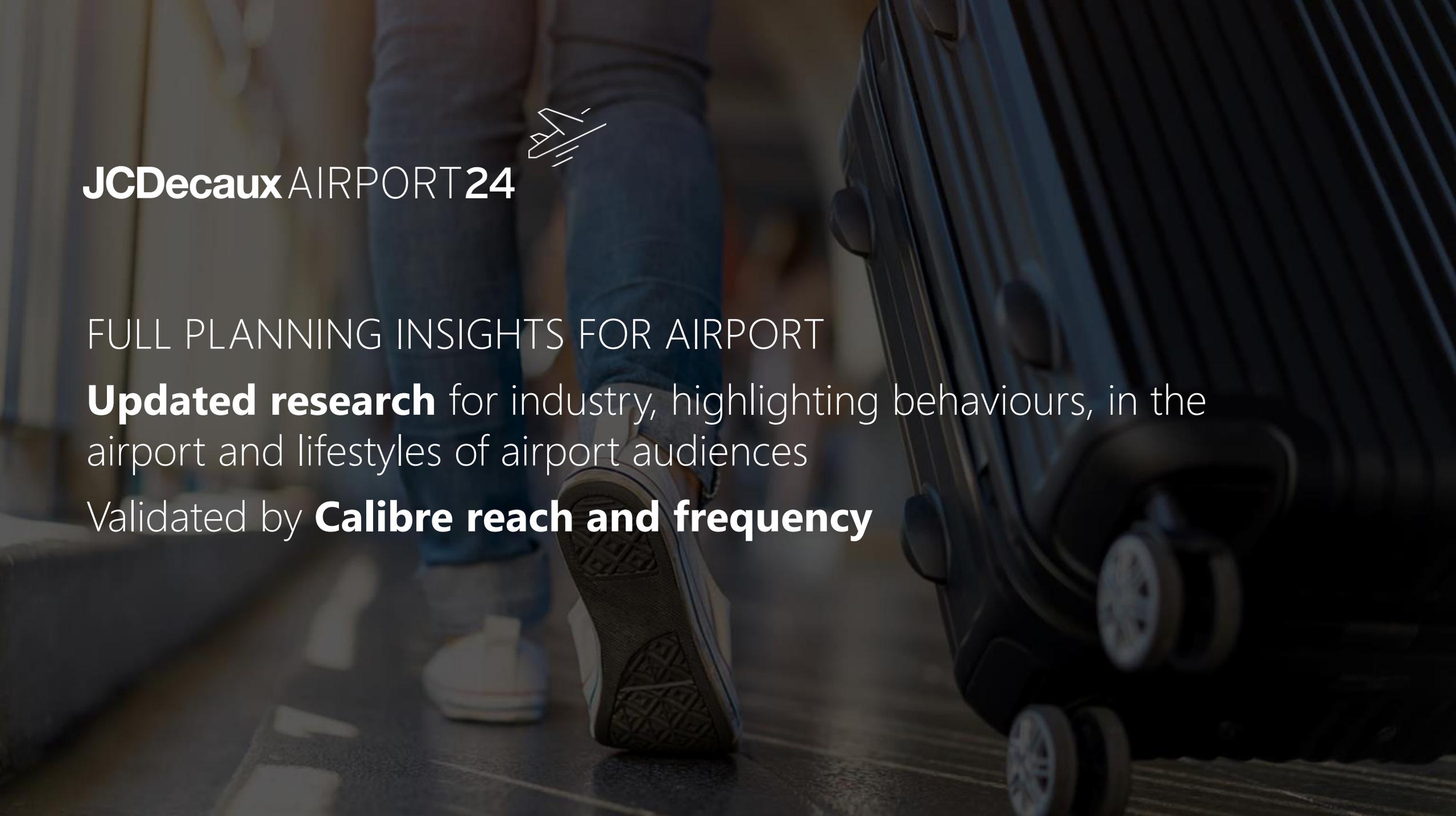
How do you respond to airport advertising?

### Domestic



### International





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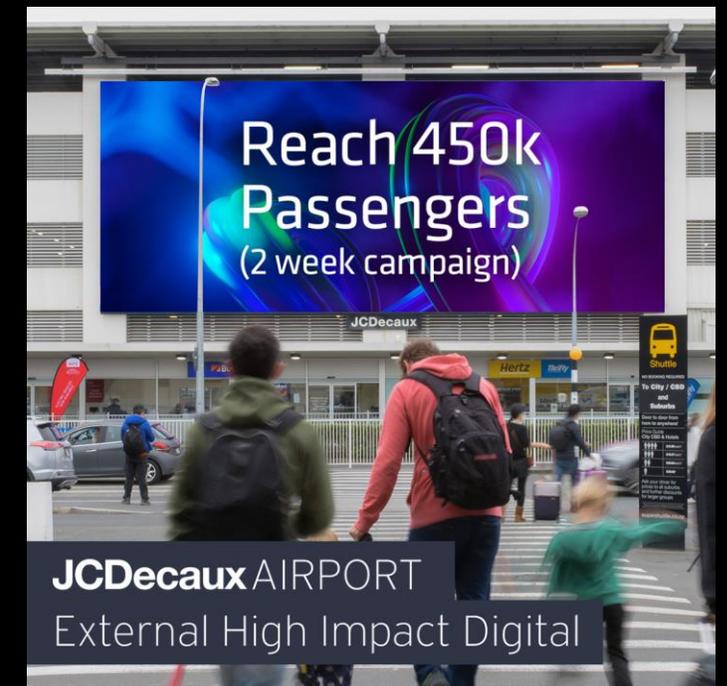
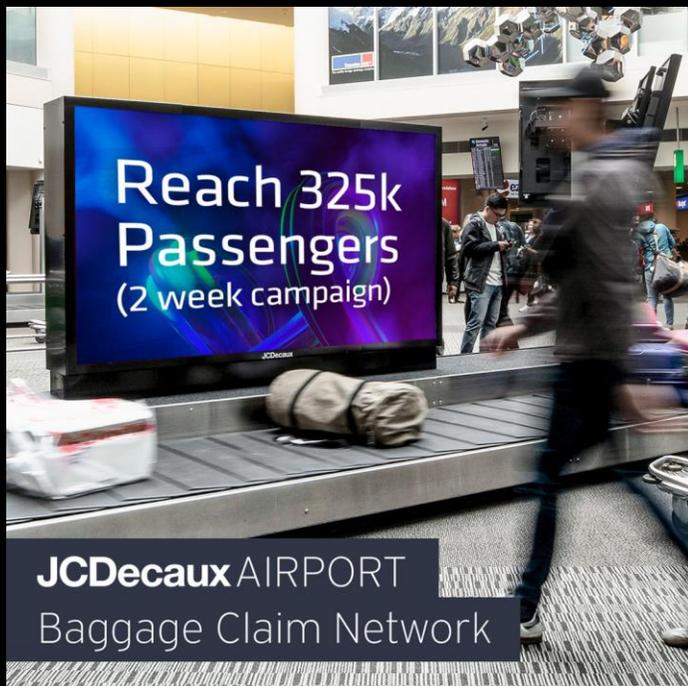
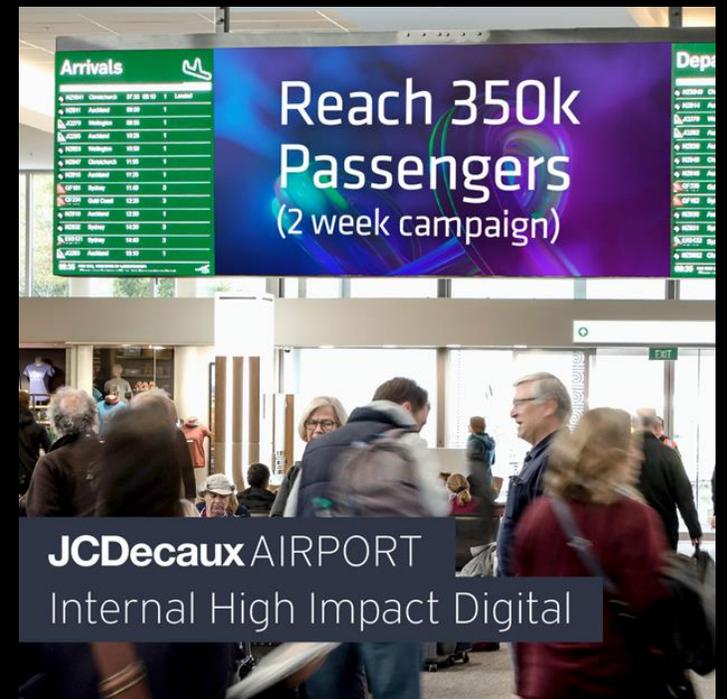


FULL PLANNING INSIGHTS FOR AIRPORT

**Updated research** for industry, highlighting behaviours, in the airport and lifestyles of airport audiences

Validated by **Calibre reach and frequency**

# JCDecaux AIRPORT 24



# JCDecaux AIRPORT 24

THANK YOU

