

# Dublin Airport Advertising Research

April 2018  
Ref: 289518

# Background & Objectives

- / Dublin Airport is the 15th busiest airport in Europe with approximately 81,000 passengers every day. This presents a significant opportunity to maximise advertising on both a B2C and B2B level.
- / The key objective of this research is to enable the Advertising Section at Dublin Airport to effectively demonstrate the value to be had in advertising at Dublin Airport to both existing and potential customers. This ultimately aims to protect the current customer base, but also grow the repertoire of customers.
- / The Requirements
  - Awareness of advertising throughout Dublin Airport
  - Understand how important and impactful advertising at Dublin Airport is
  - Understand levels of engagement with various advertising sites – and what impacts this level of engagement
  - Explore the impact of profiles on advertising at Dublin Airport – i.e. how the type of passenger impacts engagement with advertising
  - Determine what advertising sites appear to work best for Dublin Airport
  - Determine if Dublin Airport as a site differentiates from other advertising platforms (i.e. comparing to other OOH platforms)
  - Understand the sentiment of the passenger travelling through Dublin Airport

# Methodology - I

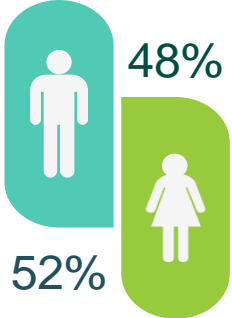
- / 817 interviews were conducted face-to-face throughout Dublin Airport.
- / In order to ensure the sample contained a mix of all potential respondents exposed to advertising at Dublin Airport, the following respondent types were included;
  - / Departing Passengers (Pier 4, Pier 3, Pier 2, Pier 1)
  - / Arriving Passengers in Terminal 1 and Terminal 2 (included a mix of hand luggage only and checked baggage passengers)
  - / Meeters/greeters in Terminal 1 and Terminal 2 awaiting to meet arriving passengers.
- / The margin for error on a sample of 817 is +/- 3.4%
- / Fieldwork was conducted from 14<sup>th</sup> March – 17<sup>th</sup> April 2018.



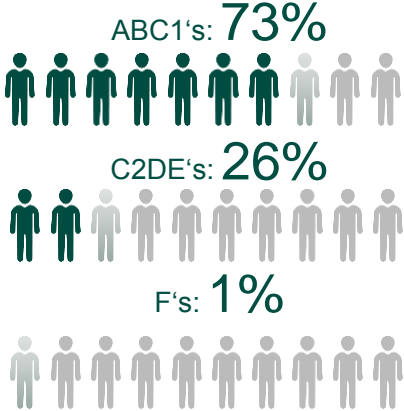
# Sample Profile

Spread of demographics included in the sample profile across Departures, Arrivals and Meeter/greeters.

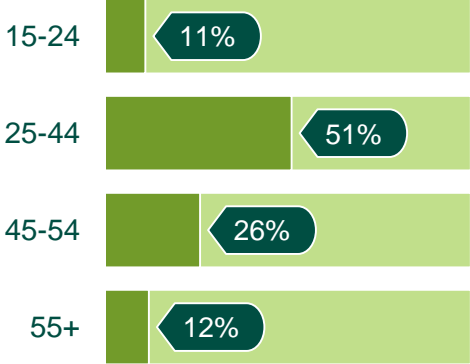
**Gender**



**Social Class**



**Age**



County of Residence	
Republic of Ireland	60%
Northern Ireland	6%
UK	13%
Other	21%
SUMMARY	
NET: IRISH	66%
NET: NON-IRISH	34%

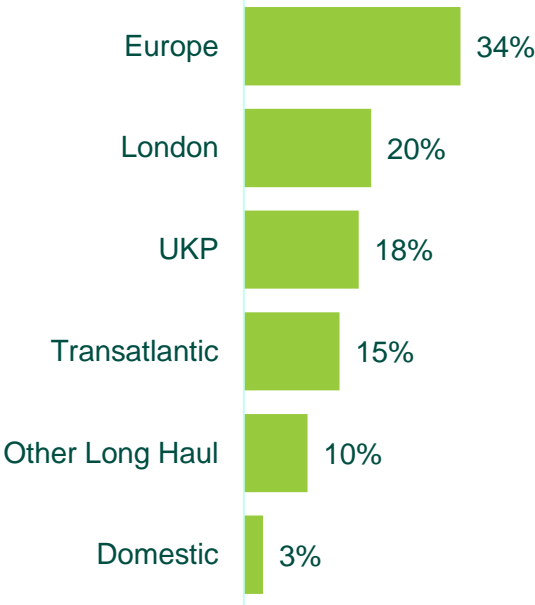
PARTY COMPOSITION / FAMILY TYPE	
Travelling alone	55%
Mixed couple	19%
Family with children	7%
Family with children under 16	6%
Family with children over 16	2%
Other adult party	18%

**Sample Profile - I**

(Base: All Respondents – 817)

Average time spent at the airport among departing passengers was 2 hours 16 minutes, providing significant opportunity to expose respondents to advertising.

**Travelling from/to Today**



**Main Purpose of Trip**



NET: BUSINESS	20%
NET: NON-BUSINESS	80%

**Average Dwell Time (Departing Pax)**

Average (Mins)  
**2 hours 16 mins**

**Average terminal time (Arriving Pax)**

Average (Mins)  
**42**

**Average Waiting Time (Meeters/Greeters)**

Average (Mins)  
**34**

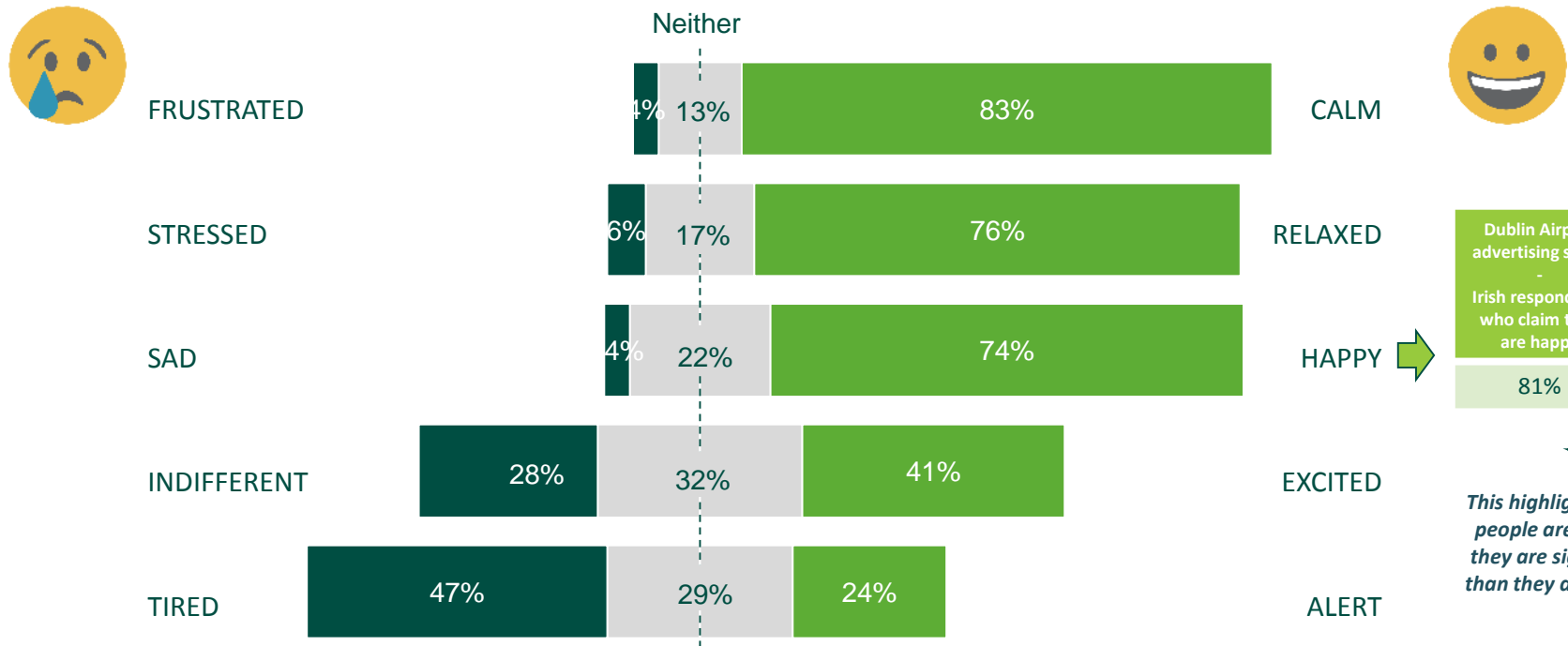
**Sample Profile - II**

(Base: All Respondents – 817)



# Passenger Sentiment

Clearly passengers and meeters/greeters are positively disposed when at Dublin Airport. Very few claim to be frustrated, stressed or sad. There are however a pool who claim to be indifferent, and half claim to be tired which may have an impact on respondents susceptibility to advertising.



Dublin Airport advertising study - Irish respondents who claim they are happy	Win End Year Study – Irish who claim to be 'happy' on a typical day
81%	63%

*This highlights that when Irish people are in Dublin Airport, they are significantly happier than they are on a typical day.*

# What are Passenger Sentiments

(Base: All Respondents – 817)



The emotions which divide our Dublin Airport users most is whether they are excited or indifferent.

## Excited – 41%

Meeters/Greeters  
Irish  
Diminishes with age



When a passenger, it's those travelling with someone...  
Mixed couple  
Family

Non-business travel; in particular, Main holiday or Personal/family  
C2DE  
Higher ownership levels of niche technology products

**Higher awareness of ads**  
**Engaged with ads**

## Indifferent – 28%

Departing passenger  
Non-Irish  
Male  
55+  
AB  
Travelling on average 9 times per annum  
Travelling alone  
Business  
More regular purchaser of alcohol



**Lower awareness of ads**  
**Less engaged with ads**

**Emotional pulls**  
(Base: All Respondents – 817)

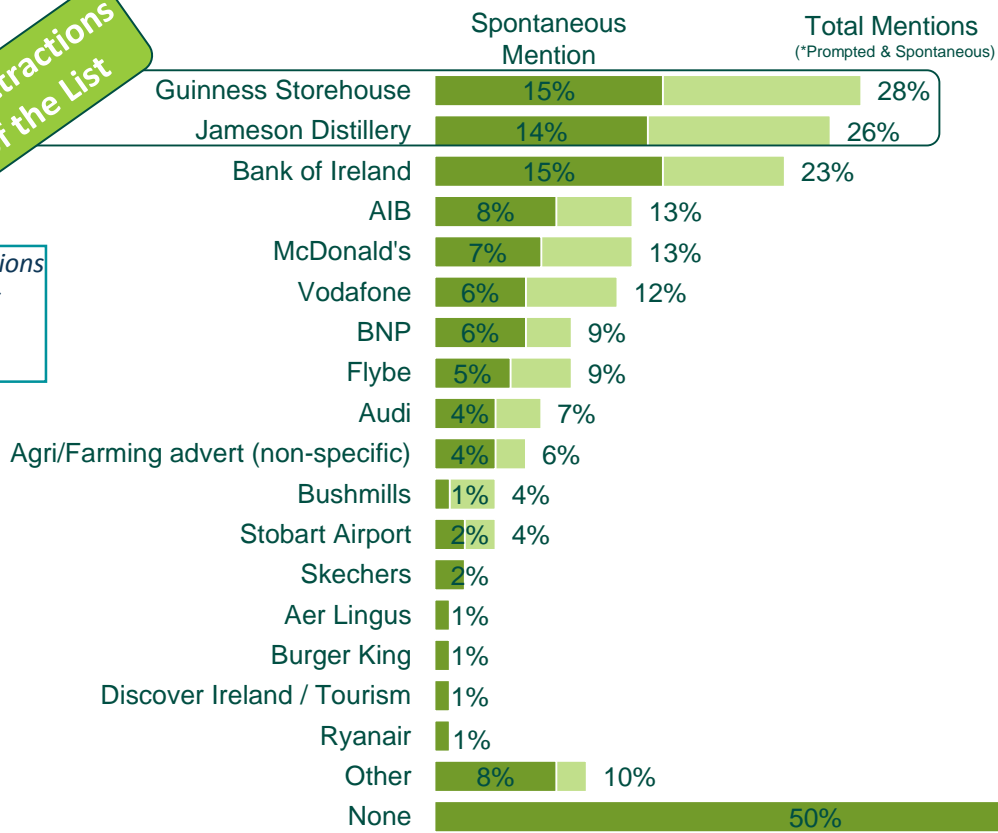


# Advertising Awareness

**Unprompted recall of advertising at Dublin Airport is polarised, with an even split either side. Advertising that is more related to tourism has a higher level of unprompted recall.**

**Tourist Attractions  
Top of the List**

**FACT:** Tourist attractions cut through better at Dublin Airport than other adverts



*\*Respondents were simply read out a list of brands that are advertising at Dublin Airport. At this stage, nobody was asked about specific campaigns.*

/ In 2012 highest spontaneous awareness was 18% and total mention was 28% - both for Vodafone.  
/ 46% claimed to have seen no advertising in 2012.

*\*In-terminal advertising research conducted in 2012 in Dublin Airport*

**Advertising Awareness – Not Campaign Specific**

(Base: All Respondents – 817)



# Attitudes Towards Advertising at Dublin Airport

# Clear appetite to see more interactive and engaging advertising at Dublin Airport – this gives licence to Dublin Airport to be more experiential with their advertising.

## INNOVATION

Opportunity to provide interactive, innovative advertising to passengers

67%

Highest among 15-34 year olds and mixed couples.

I would like to see more **innovative advertising** at Dublin airport

57%

Highest among 15-34 year olds and families.

Advertising at Dublin Airport would be better if I could **interact** directly with the brand, for example, using **virtual reality** or being able to touch and feel the brand

## Attitudes Towards Advertising at Dublin Airport

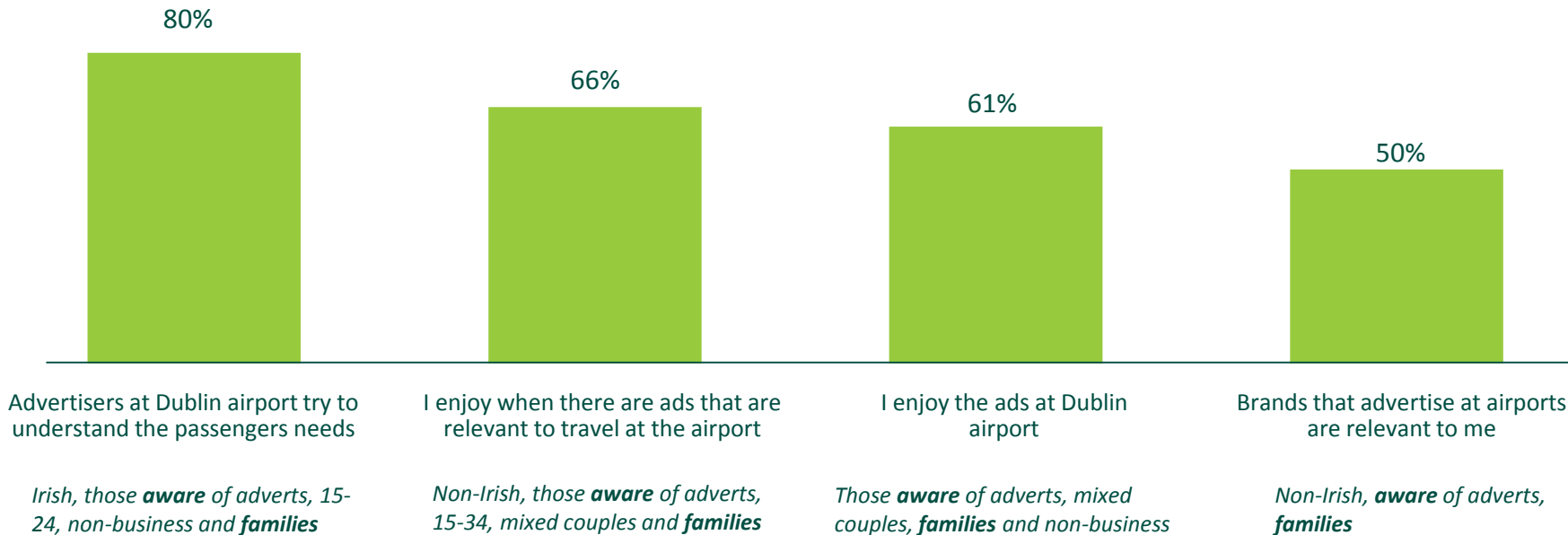
(Base: All Respondents EXCLUDING Don't Know)



(Q.5a)

Passengers believe Dublin Airport is trying to understand the passenger needs. Slightly polarised opinions as to relevance of adverts at Dublin Airport – however a difficult ask to ensure mass relevance to such a dynamic profile.

RELEVANCE

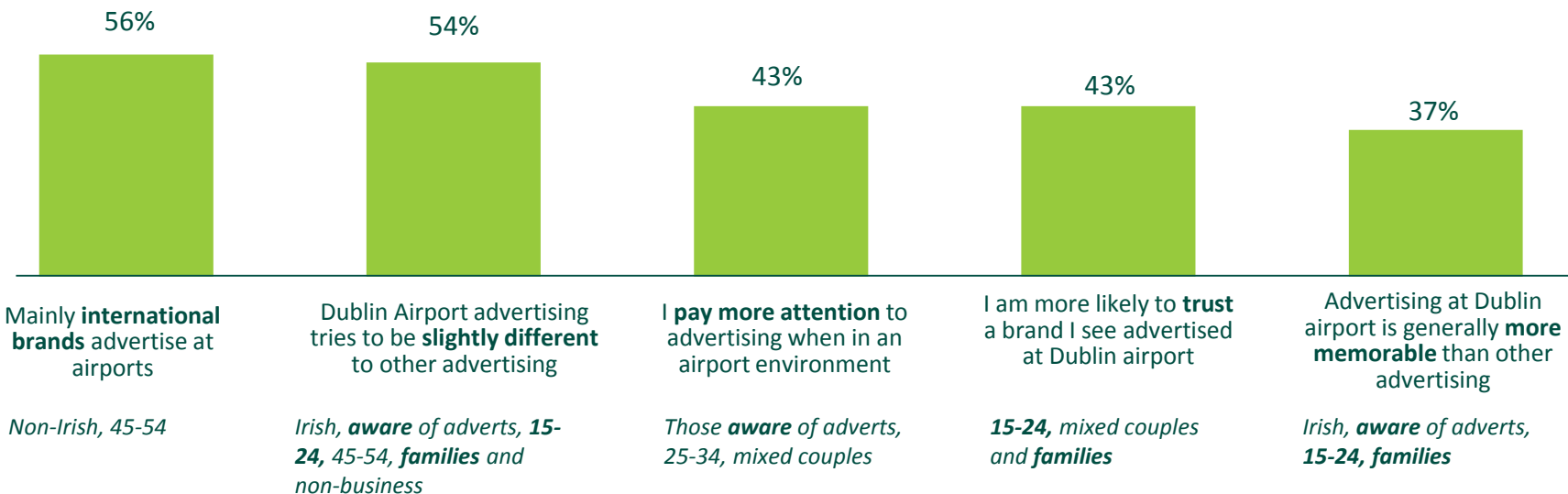


## Attitudes Towards Advertising at Dublin Airport

(Base: All Respondents EXCLUDING Don't Know)

Just over 4 in 10 claim they pay more attention to advertising at airports, with a similar proportion claiming to trust a brand advertised at Dublin Airport.

### COMPARISON TO OTHER ADVERTISING

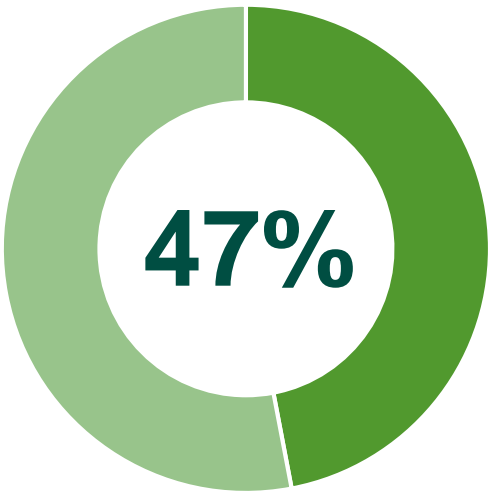


## Attitudes Towards Advertising at Dublin Airport

(Base: All Respondents EXCLUDING Don't Know)

Just under half agree that they engage more with advertising at Dublin Airport than other locations. This is particularly high amongst those with a longer dwell time and aged 15-24 (who also would like to see more innovative/interactive adverts at the airport).

Agree they Engage More with Advertising at Dublin Airport than other locations



- Who's more likely to engage?**
- 3hrs+ Dwell Time
  - 15-24
  - C2DE
  - Happy
  - Excited
  - Alert

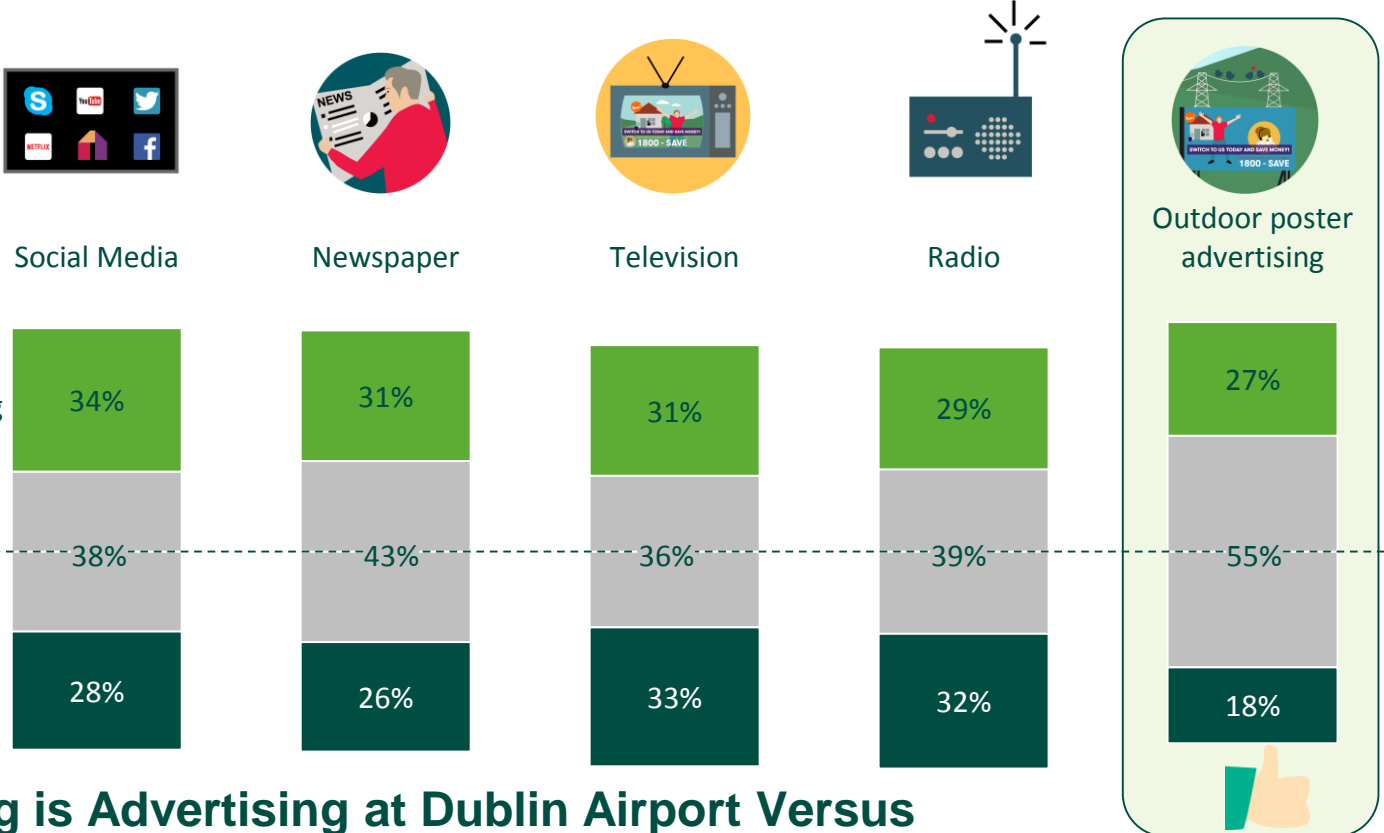
## I engage more with advertising at Dublin Airport

(Base: All Respondents – 817)



With the exception of TV and radio, advertising at Dublin Airport is seen to be more engaging than most platforms, including social media, newspapers and outdoor advertising.

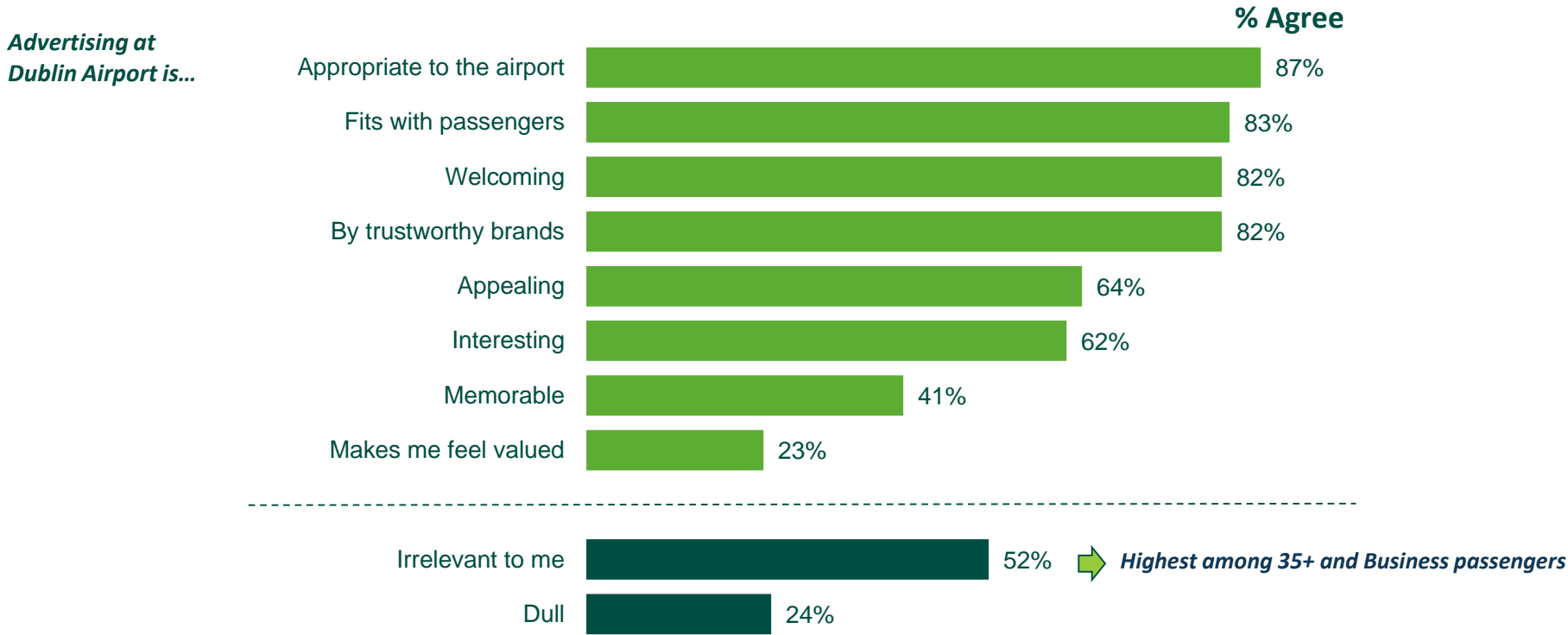
**FACT:** Advertising at Dublin Airport seen to be more engaging than most other mediums, and only marginally less engaging than TV and radio.



## How Engaging is Advertising at Dublin Airport Versus Other Mediums?

(Base: All Respondents – 817)

Advertising at Dublin Airport is seen in a very positive light with the majority agreeing it is appropriate to the airport, fits with passengers, is welcoming and is by trustworthy brands. There is work to be done to drive memorability and also making those at Dublin Airport feel valued.



# Attitudes Towards Advertising at Dublin Airport



(Base: All Respondents – 817)

Those in a more excited, positive mind space are significantly more likely to rate advertising at Dublin Airport positively. This highlights the importance of ensuring a positive passenger experience.



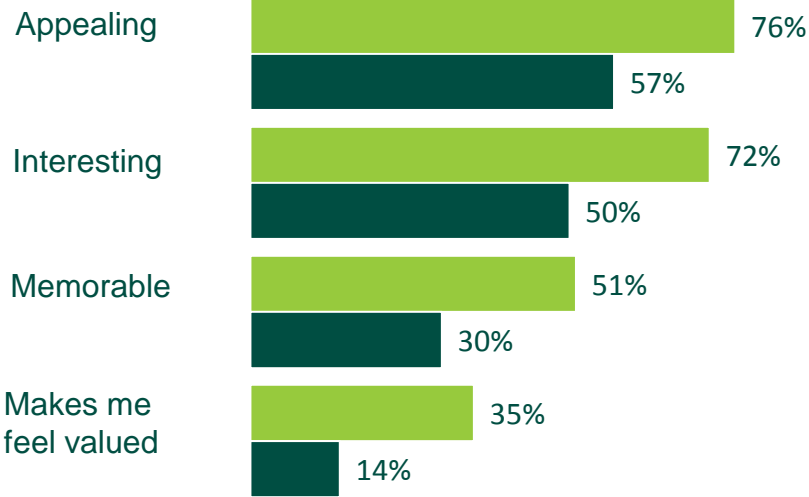
**Indifferent** 28%



41% **Excited**

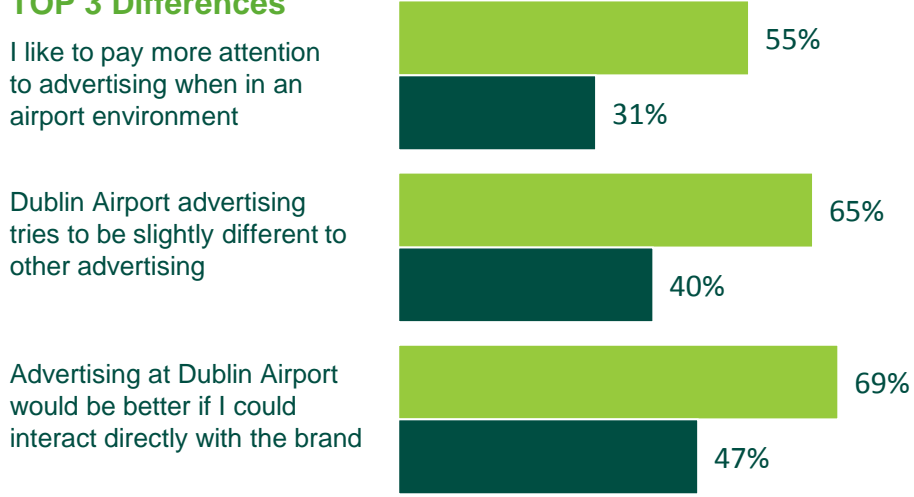


**Advertising at Dublin Airport is...**



**Attitudes towards advertising at Dublin Airport....**

**TOP 3 Differences**



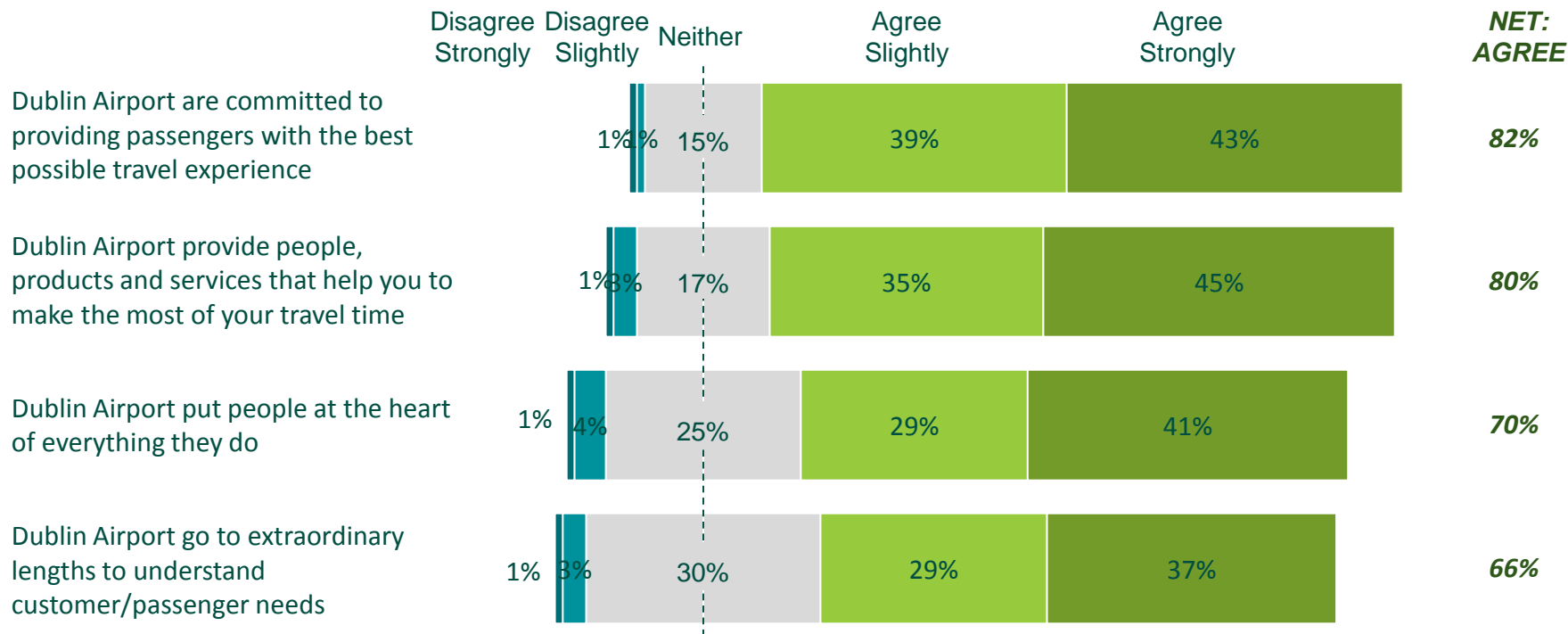
**Do Emotions Impact**

(Base: All Respondents – 817)



# Attitudes Towards Dublin Airport

The two statements which have strongest endorsement are Dublin Airports commitment to providing passengers with the best travel experience and providing people, products and services that help make the most of your travel time. There is some lack of knowledge around the lengths the airport goes to in order to understand the passengers needs.



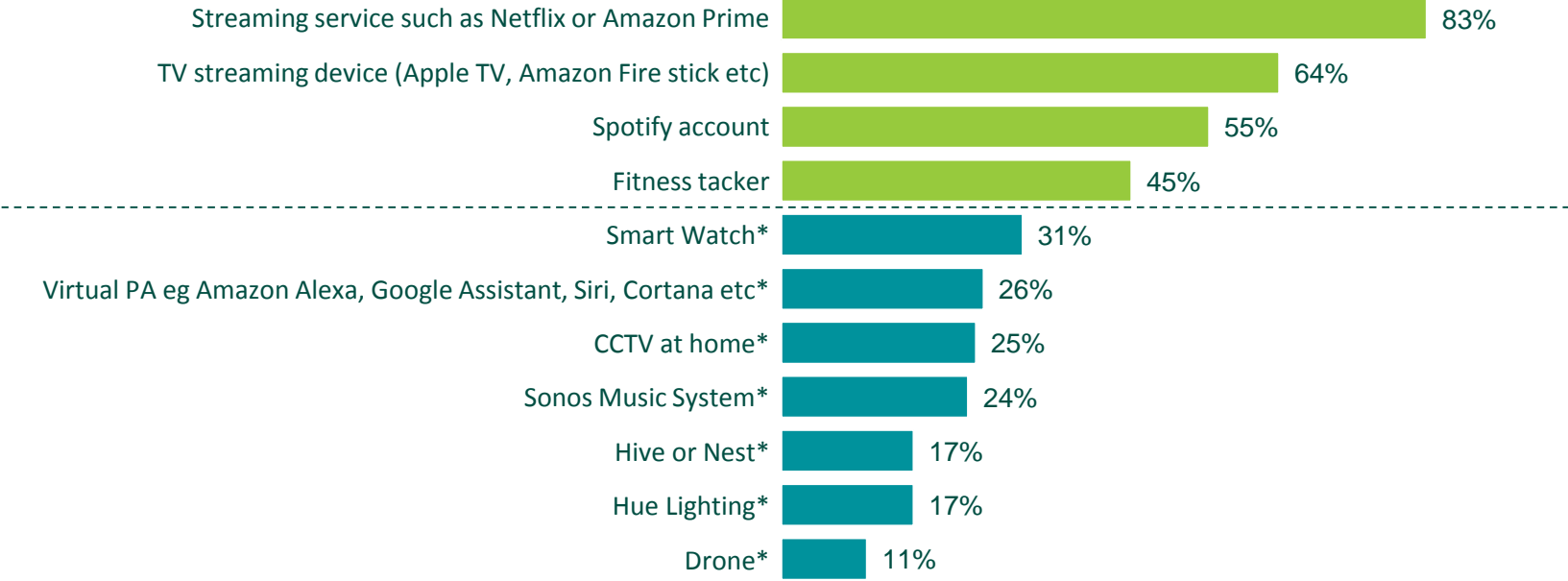
# Attitudes Towards Dublin Airport

(Base: All Respondents – 817)



# Lifestyle

A high proportion have some form of streaming device, while over half have a Spotify account. Meanwhile the smart home PA devices and Sonos music systems are enjoyed by 1 in 4 passengers.



**SUMMARY**



# Household Items

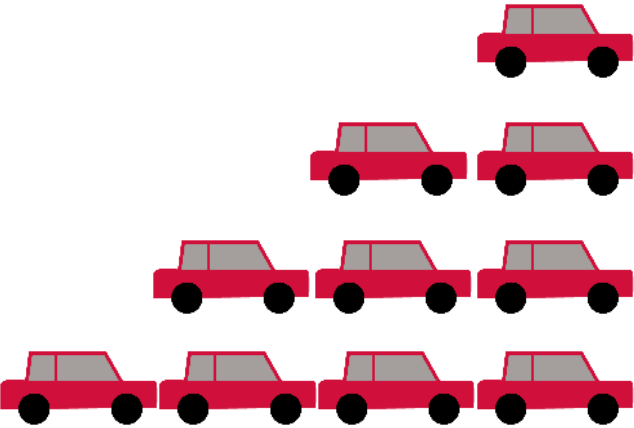
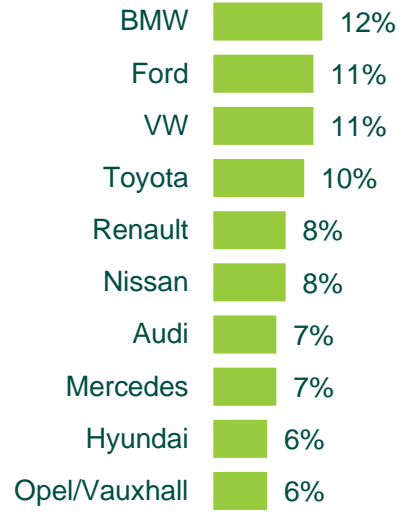
(Base: All Respondents – 817)



1 in 10 passengers do not own a car. BMW tops the poll at 1 in 8 owning this marque.

17% of non-Irish do not own a car.

0 Cars	11%
1 Car	40%
2 Cars	34%
3 Cars	11%
4+ Cars	4%



Who has 3+ Cars in household

- 15-24 } Likely living together
- 55+ }

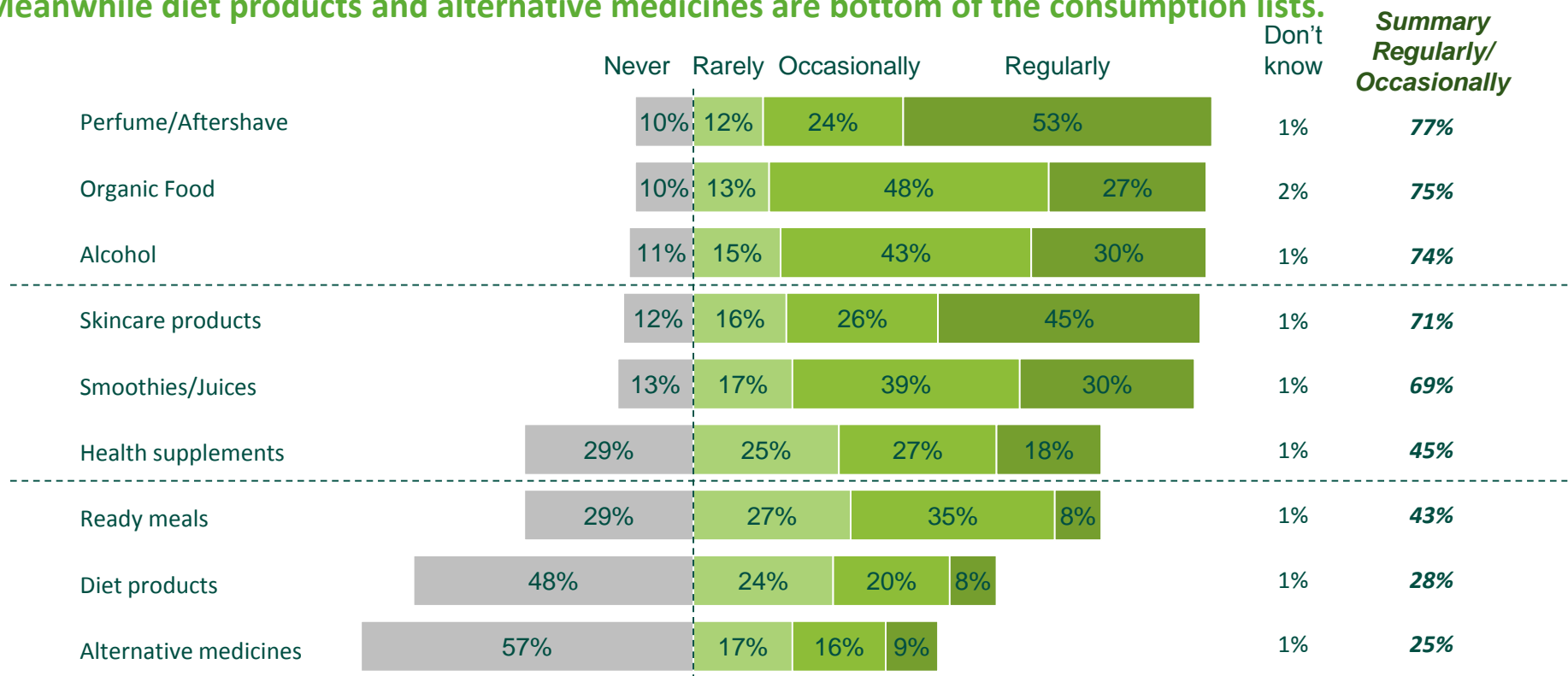
Those travelling as a family with older children

# Number of Cars in The Household

(Base: All Respondents – 817)



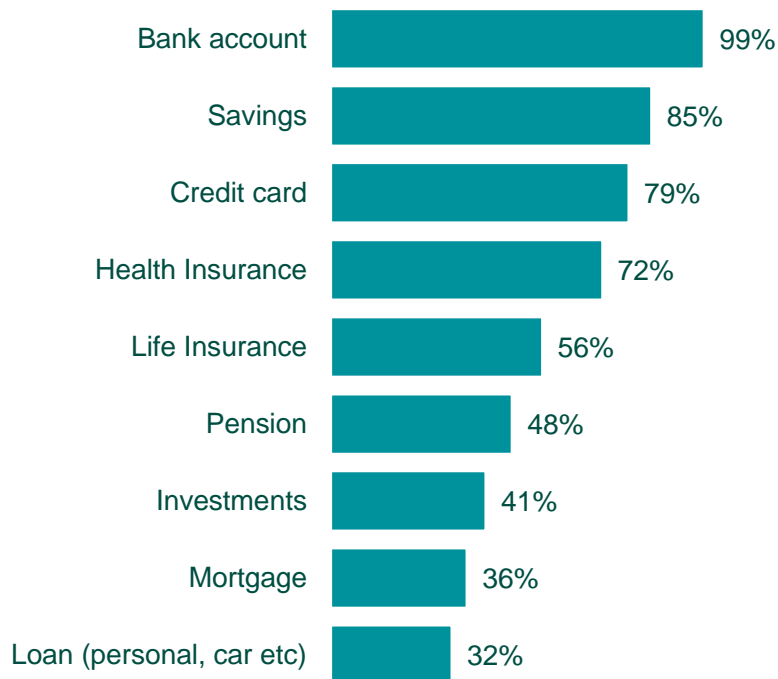
**Organic food and alcohol have almost identical levels of consumption and are in the top 3 categories purchased. Skincare and Perfumes/aftershaves continue to have strong regular purchase levels. Meanwhile diet products and alternative medicines are bottom of the consumption lists.**



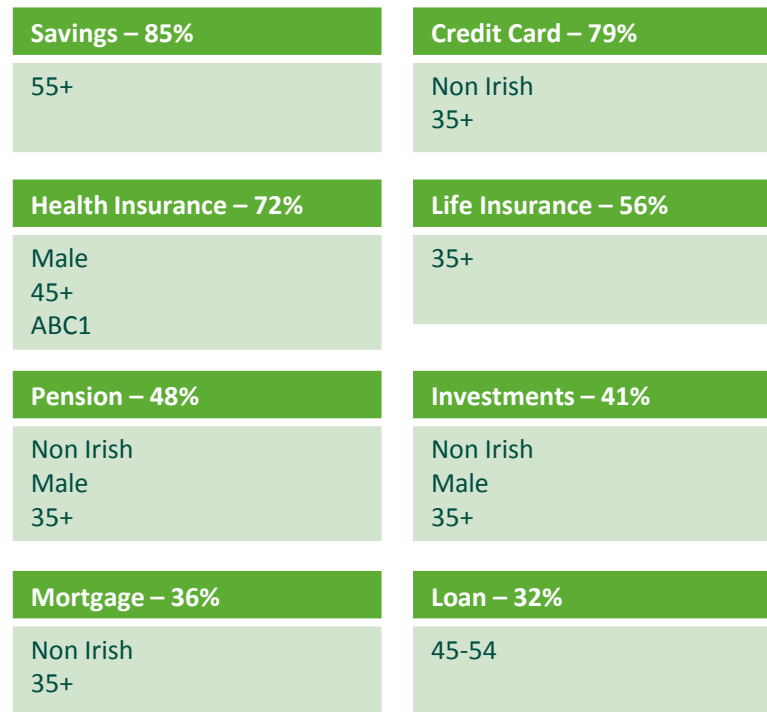
# Products Consumed

(Base: All Respondents – 817)

## All passengers have a bank account



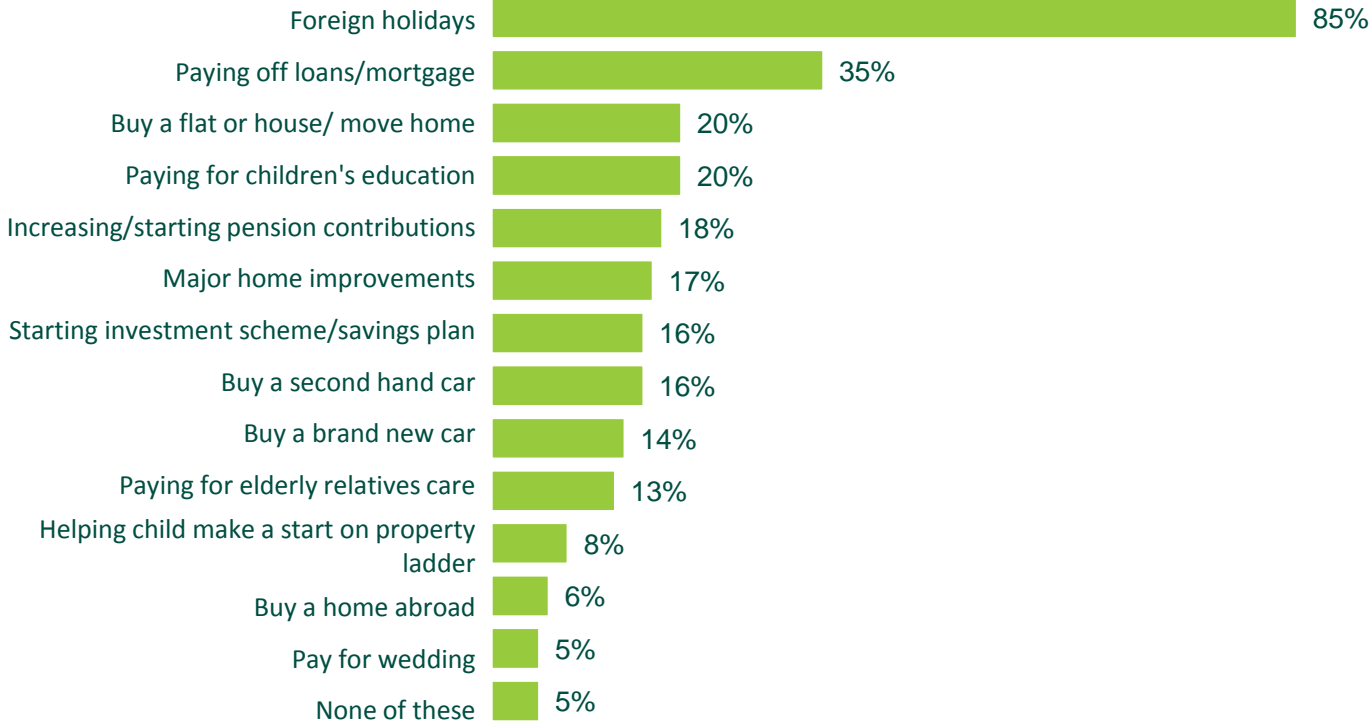
### Who's more likely to own



# Financial Products Owned Personally

(Base: All Respondents – 817)

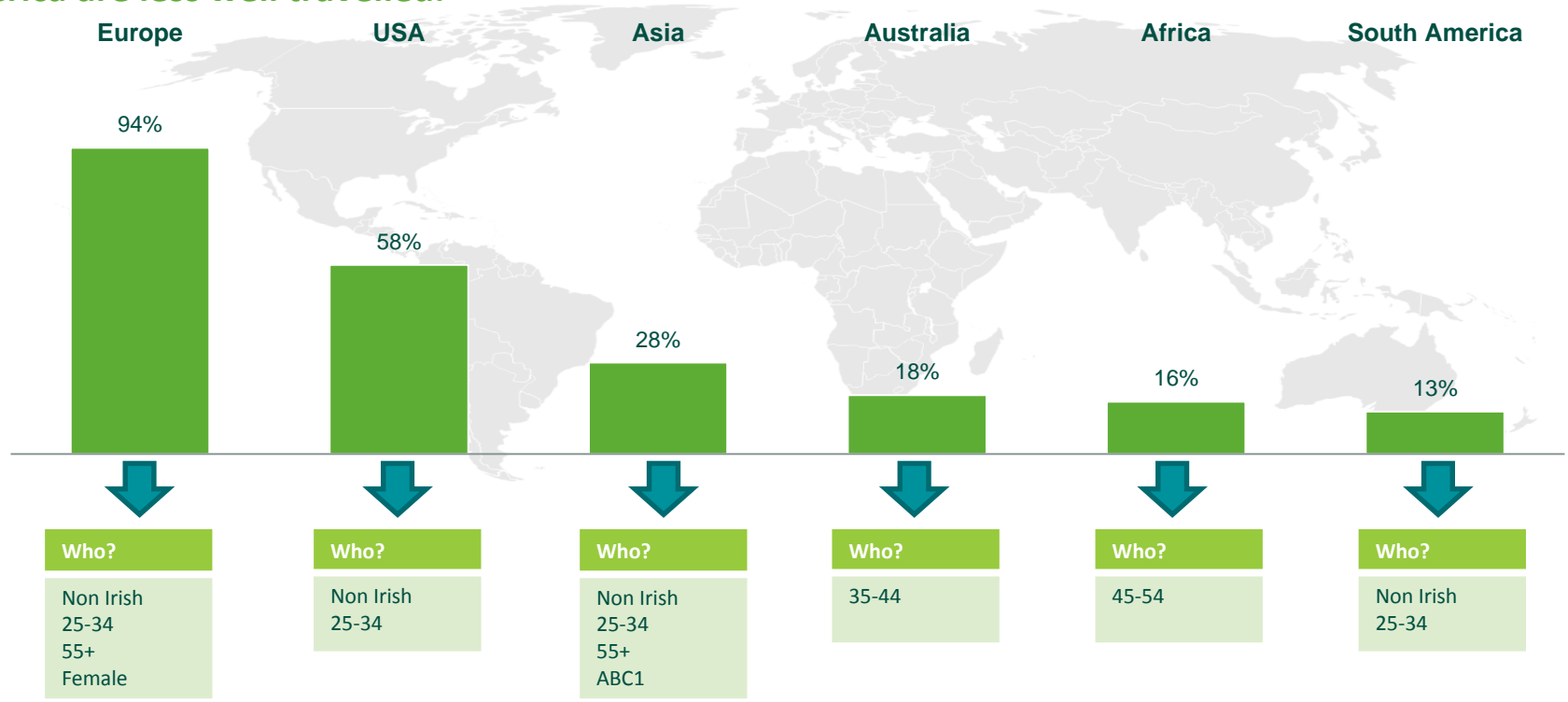
The biggest investment in the year ahead is foreign holidays with almost all stating this will be a priority. Paying off outstanding loans is also a necessity but only among 1 in 3. While 1 in 5 are considering purchasing a house.



# Year Ahead Likely Investment

(Base: All Respondents – 817)

As a European nation, our neighbouring European countries with Almost 6 in 10 travelling to the US. Just over one-quarter have travelled to Asia, while Australia, Africa and South America are less well travelled.



# Holiday Destinations in The Past 5 Years

(Base: All Respondents – 817)