Trends in transit

By Craig Page-Lee & Erik Warburg

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Commuting is one of those unavoidable routines much like taking a shower and getting dressed in the morning. As with everything else, there are trends, phases and technological developments and it is up to advertising agencies to capitalise on these to the benefit of their clients. Stand still time is becoming shorter, mobile connectivity is on the increase, more commuters are resorting to public transport as their preferred means of getting to and from the office. The media marketing sector has no option other than to observe trends and developments and adapt accordingly.

Craig Page-Lee (left) and Erik Warburg: People are spending more time travelling… Speak to them

Better public transit options

Rea Vaya launched in August 2009 aiming to provide Johannesburg with the beginnings of decent public transport system. A key objective was to connect commuters along 330km of major metropolitan roads in Johannesburg, affording 80% of Johannesburg's urban and peri-urban residents the chance to catch a bus.

Following in close succession, was Cape Town's MyCiti network launch in 2010, just prior to the 2010 World Cup. As with Johannesburg's Rea Vaya, the objective was to offer Capetonians a dependable, affordable, safe transport system.

Long-term benefits for the city include rolling out the MyCiti network to the lowest income areas of Cape Town, including Khayelitsha and Mitchell's Plain, over the next 15 to 25 years. The long-term benefits for both cities are unquantifiable. Not only will an increased number of prospective commuters have a better way of travelling (in terms of speed, safety and affordability), but the more extensive the networks, the further the long-term benefits are experienced, including a reduction in the number of vehicles required to transport more people.

A world-class rail network in Gauteng

8 June, 2010 signalled the first Gautrain journey open to the public - just in time for South Africa hosting the 2010 FIFA World Cup. The maiden journey was between OR Tambo International Airport and Sandton Station. With the exception of Park Station (due to technical problems), all Gautrain stations are currently operational.

The effects of the Gautrain transport system can already be seen. Over the past five months (September 2011 - Jan 2012) there have been over 700 000 trips averaged per month. Most of these would have been commuting via road pre-Gautrain. A key objective of the Gautrain is to reduce the traffic on the N1 Ben Schoeman alone by 20%. The effects of this will be far reaching.

The Gautrain rail service also includes roll-out of the Gautrain buses, which lift passengers to and from the stations. Although the uptake of this mode of transport is not as successful as planned, any increased usage of the system will have long term benefits in the reduction of road traffic levels in Johannesburg.

Toll roads in Gauteng are changing travelling patterns

The much-spoken about and debated toll roads in Gauteng are still shrouded in mystery. At the time of writing, it is unclear as to when, or if, the implementation of the toll-road charges on the N1 ring road around Johannesburg will commence.

The value of the toll fees will have dramatic impacts on Gauteng's traffic volumes. Many road-users will choose to select routes that avoid the highways, which will put added pressure and strain on the secondary roads. Increased traffic and reduced maintenance (in the form of pot-holes) is clearly expected.

People are spending more time out of their homes

According to the latest OCS study*, a greater number of people are spending more time out of their homes than two years ago. In addition to this, evidence suggests that 73% of people in full-time employment actually spend more time at work than they were two years ago. Understanding when and where to connect with these consumers - and what message to deliver (needs state) has become even more important.

A similar study in the UK found that the average person is spending 33% more time out of home than they were 10 years ago, making this a global phenomenon. As cities expand, and traffic intensifies, the amount of time required to reach your destination increases too. The current economic climate has seen that people are prepared to travel even further if it means that they can secure a steady job - an ideal opportunity to capture audience attention.

People are spending more time travelling

One of the major reasons that people are spending more time out of home is predominantly because of the increased time travelling between home and work, and between home and retail stores. According to the OCS 2011 forecast, the typical South African spent 2 hours and 21 minutes travelling. This is made up of a combination of car, bus, taxi, metered-taxi or train travel.

Although initiatives like the Rea Vaya, MyCiti and the Gautrain are improving travel times and travel experiences in those particular cities, they are still some years away from full deployment. As South Africa's population rises and urbanisation continues (by over 1 million people per year on average over the past decade), the infrastructure comes under increased pressure, and road networks get congested, causing traffic and delays. Urban sprawl adds further time to the typical journey, as the average worker is travelling further to get to work now than they did previously (currently the *average* driver drives 16.5km per day in South Africa - obviously more certain areas than in other.

Township travelling patterns are changing

Historically township travel has been heavily focused on inter-township and city travel - i.e. much of the traffic into and out of the township and the CBD. Other than commuters getting to work, a large reason for this travel was for retail. Township-dwellers travelled far distances to do their weekly or monthly shopping.

However, this is changing, and rapidly. As has been seen with Maponya Mall in Soweto (and soon to be Diepkloof Mall, too), the large shopping malls are being built within the township environments. This is having major effects on the travel patterns. The intra-township taxi traffic is now far more important, as it is taking township-dwellers directly to the point of purchase. This is affecting out-of-home advertising in a big way, as reaching the township market via a few highway billboards is no longer as effective as it once was.

More time to engage in conversation - listen / understand / react

As consumers are spending more time in traffic, the optimum opportunity for brands exists in the successful deployment of integrated campaigns across multiple out-of-home touch points. Brand awareness is driven predominantly through use of the primary OOH medium - namely that of billboards, while targeted conversation (product and service promise) is delivered through a closer, more personable medium in the form of Citilites, and price, product features and benefits is delivered through the 'up front and personal' medium of street poles. The variable messages are consumed in direct relationship to the proximity and relevance of the medium to the audience in the daily journey - as well as pause time at the various touch points during the day-part journeys. Self-drive increases awareness and brand /product recall - more 'pause' time to recall brands.

Changing the game plan

The increased use of Gautrain, specifically by higher LSM groups and business and international travellers will have a long-term impact on OOH medium placement in and around OR Tambo airport. This, coupled with heightened pressure on travellers (state of mind in the consumer journey) could result in a decreased awareness of traditional OOH medium on approach and exit routes to airports. Placement of media at specific (measured) approach and exit points to airports needs to address customer needs' state in the transient mindset -possibly just brand awareness purpose and not specific sales drive.

Start the Conversation

Make it highly interactive. Capture attention at the 'pause' moments. Deliver a clue, a price, a promise, a prize! Capture information in the promise of an entry into a highly valued competition etc. ALL of this is possible in a transient / mobile state. Increase the 'pause moment' at traffic lights for the day at a major intersection. Increase the interaction momentum en-transit in public transport systems etc. Present the brand, explain the proposition and set the context for trial.

Shape / own the conversation

Consumers do not want to be left waiting 'on/in' their journey of brand experience. They want to be fed with brand information, and are entitled to make decisions on brand take-up (buy-in) during the journey.

Additional facts and figures

Let's break down some facts about commuters themselves.

Primary modes of transport (total sample) during the week:

Taxi	45%
Bus	7%
Train	3%
My own car	23%
My own motorbike	0%
I walk	15%
My bicycle	0%
I get a lift from friends/family	6%

- 16% of people spend more than an hour each weekday on the bus
- 14% of people spend more than an hour each weekday on the train
- 28% of people spend more than an hour each weekday in a car
- 18% of people spend more than an hour each weekday in a minibus taxi
- 26% of people are bored when waiting for the bus, train or taxi
- 27% are relaxed when travelling on a bus, train or taxi

Did you know that the commute to and from work has the following statistics?

- 21% of people say that they spend a lot of time in the traffic travelling to and from work
- 32% of people working full time say that they spend a lot of time in the traffic travelling to and from work
- 58% of people travel the same route to work each day
- 65% of people are thinking about work when they are travelling to work in the morning
- 42% of people are thinking about breakfast when they are travelling to work in the morning
- 55% of people are thinking about what to watch on TV when travelling home after work in the evenings
- 31% of people are focused when travelling to work in the morning
- 30% of people are tired when travelling home from work in the evenings

- 17% of people are happy when travelling home from work in the evenings
- 51% of people are thinking about what to do that evening when travelling home after work in the evenings

And what about during their lunch hours?

- 45% of people are thinking about the shopping they need to do when travelling over lunch time
- 41% of people are thinking about their finances when travelling over lunch time

Apart from travellers commuting to and from work, we identified another form of commuter, namely the housewife (or in some cases, the househusband). This commuter spends her/his time running the home and carting their children to and from school, as well as to their various extra-mural activities.

- 2pm - 4pm is the most popular time to fetch and carry kids, with 12% of people doing so
- 17% of people think that they spend most of their time fetching and carrying kids
- 35% of housewives/househusbands think that they spend most of their time fetching and carrying kids

Where are consumers noticing out-of-home media and which forms do they trust?

- Over 80% of respondents notice street pole posters and billboards
- 85% of respondents notice advertising outside a shopping mall
- Bus advertising is the most noticeable mobile medium, with over 80% of people noticing it
- 78% of people notice activations at shopping mall forecourts
- Billboards have influenced the opinion of brands for 76% of people
- Shopping mall advertising has influenced the opinion of brands for 80% of people
- 75% of people trust billboards
- 61% trust bus shelters
- 76% of people trust advertising in shop windows
- 85% of people trust advertising inside a shopping centre
- 77% of people trust advertising on the side of a bus
- Free samples have made 75% of people buy something that was advertised
- 73% of people will notice a billboard more if the creative is changed regularly

What are commuters looking out for on billboards?

- 58% of people tend to look out for ads that show food brands
- 46% of people tend to look out for ads that show sweets, chocolates and snacks
- 45% of people tend to look out for ads that show music brands
- 47% of people tend to look out for ads that show cellphones

The stats are vast and varied. People often view commuting to and from work as wasted time, but outdoor allows this very passive activity to be potentially very active. There are increasing numbers of interactive outdoor options that can reach consumers when they are most susceptible to messaging. In this day and age, where budgets are under scrutiny, it's important to gain as many insights as possible when making a purchase, be it in a traditional media format or in out-of-home. The more facts one has when making a decision around advertising spend, the greater the peace of mind that that decision is the correct one and has been made with strategic insights that will ultimately benefit the bottom line of the company. Commuters are a captive audience and their time on the road is the biggest opportunity to get their attention. Out-of-Home advertising, provided it is done using strategic insights, is most likely the best method of reaching them.

Car market:

- 46% of males tend to look out for car adverts.
- 4 out of 10 students tend to look out for car adverts.
- The majority of people (42%) who tend to look out for car adverts are aged between 25 and 34.
- 82% of people agree that value for money is the most important consideration when buying a new car.
- 7 out of 10 men tend to shop around for the best deal when looking for a new car.
- 67% of people who agree that the look and feel of a new car is the most important consideration fall between the ages of 18 and 44.
- Only 38% of people tend to shop online when looking for a new car.

Entertainment:

- 1 in 4 students tend to look out for entertainment adverts.
- 1 in 4 people working full time tend to look out for entertainment ads.
- 4 out of 10 males tend to look out for cinema adverts.
- 46% of students tend to look out for cinema adverts.
- 4 out of 10 people who look out for cinema ads fall within the 15 to 34 year old age gap.

Health & beauty:

- 44% of scholars tend to look out for health and beauty adverts.
- The majority of people who tend to look out for health and beauty ads are aged between 25 and 34.
- 4 out of 10 women tend to look out for health and wellness adverts.
- 43% of people who tend to look out for health and wellness adverts are between the ages of 35 and 44.
- The majority of people who tend to look out for health and beauty ads are based in Gauteng (51%).

Banking:

- 52% of people who look out for banking ads are aged between 25 and 44 years old.
- There is no male/female bias towards people who look out for banking adverts.
- The majority of people who tend to look out for banking ads are employed full-time, with 51% of them being self-employed.

Cellular:

- 47% of people tend to look out for cellular adverts.
- 53% of people who tend to look out for cellular adverts are students.
- 46% of people who look out for cellular ads are employed full time.
- 45% of people who look out for cellular ads are self-employed.
- The majority of people who tend to look out for cellular ads are based in Mpumalanga (55%).

***About OCS**

Posterscope's OOH Consumer Survey (OCS) is the world's most in-depth study of consumer behaviour in relation to OOH communications. Audiences can be segmented attitudinally, behaviourally, or demographically and analysed by environment, with a level of detail unavailable through other syndicated research systems. OCS contains data regarding technology use, direct benchmarking against other above-the-line media such as TV and print, more industry specific data (including automotive, financial, alcohol, snacks, soft drink, communication, electronic and travel) and how media actually influences buying decisions.

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