



Measurement of Outdoor Visibility and Exposure

Suite 504, 80 William Street, East Sydney NSW 2011

T 02 9357 9900 [www.moveoutdoor.com.au](http://www.moveoutdoor.com.au)

MOVE is the Audience Measurement System of the Outdoor Media Association

## Media Release

Friday 6 March 2015

For immediate release

### **Five years on, MOVE is setting the pace**

Five years ago, when PBL Media still owned ACP Magazines, just one-in-three Australians owned a smartphone and the entire marketing industry was reeling from the GFC, Australia's Out-of-Home (OOH) industry launched its ground-breaking audience measurement system– MOVE (Measurement of Visibility and Exposure).

The culmination of years of work and a \$10 million investment by the industry, MOVE was designed to simplify the planning and buying of OOH. By introducing Likelihood to See (LTS), MOVE was able to improve upon the standard measurement of target audiences at that time which was Opportunity to See (OTS), and account for traditional passive audience interaction.

When it launched in 2010, MOVE was the first audience measurement system to involve the Media Federation of Australia (MFA) and the Australian Association of National Advertisers (AANA) from day one of its design through to delivery. It achieved world's best practice at the time by delivering at launch, measurement of all major environments for OOH signage (including Airports, Buses/Trams, Roadside, Shopping Centres and Stations). A feat yet to be replicated by any OOH measurement system launched since.

Over the past five years MOVE has continually been updated, the number of advertising faces it covers has increased and the functionality of the software enhanced.

When MOVE was being developed, the industry set the bar high. It needed to be able to measure all the different environments of OOH, capable of covering all Formats within those environments and remain accurate when changes to how and where we travel would occur in future years. It has also needed to be able to expand as the industry grows. For example when MOVE was being built, the industry said that the system needed to measure 150 shopping centres. In 2015, MOVE will measure 504 shopping centres. This scenario is typical across the OOH industry, where development in existing outdoor formats by MOVE members is creating more opportunities for clients to connect with customers. In 2014, across the five primary coverage areas, MOVE measured 33% more faces than in 2010 (reflecting both new locations and conversions to digital locations).

### **MOVE measures up**

After consulting widely with media agencies and with the backing of the MFA and the AANA, MOVE has become the only credible metric for OOH measurement in Australia and comparable with other media trading currencies.

Craig Cooper, Investment Director at Starcom says: “The OOH landscape in Australia evolved five years ago with the introduction of MOVE. Finally Outdoor was able to compete with other channels in the substantiation of robust reach and frequency metrics. It however continues to be important for MOVE to be independent, to ensure impartiality of the data and has led to MOVE data becoming the industry trading currency for OOH. The MOVE system has thereby become a natural and expected function within both planning and buying teams.”

Victor Coronas, Managing Director, Magna Global adds: “The MOVE measurement system has brought a level of accountability into the OOH sector and helped both agencies and clients better understand the audiences panels can deliver from a reach and frequency perspective. MOVE has been great at demonstrating Outdoor’s strength as a broadcast channel and equipped agencies to better understand the value proposition of OOH versus other media channels. In using MOVE data we’ve also been able to understand OOH’s ability to build incremental reach when supporting other media channels.”

Cassandra Thomas-Smith, Strategy & Insights Director at Posterscope says: The primary benefit of MOVE is that it now provides a currency for the medium that is comparable with other media. This currency and comparability changes the Out-of-Home (OOH) landscape in three key areas: it increases client confidence which, in turn, increases investment; it allows for better evaluation of effectiveness– both in terms of a more meaningful and industry recognised trading base and by increasing client’s understanding of what OOH can contribute to the media plan; and, it provides a basic foundation upon which we can overlay additional behavioural and engagement insights.”

And as the trusted trading currency, MOVE has helped drive market share growth of OOH, compared to other traditional advertising mediums that have all experienced declines.

	<b>2010 Market Share</b>	<b>2013 Market Share</b>	<b>Share Point Change in Market Share</b>
Online	16.09%	28.39%	12.30%
Outdoor	4.43%	4.76%	0.33%
Cinema	0.92%	0.89%	-0.03%
Radio	9.29%	8.99%	-0.30%
Magazines	6.06%	3.47%	-2.59%
Television	37.64%	35.00%	-2.64%
Newspapers	23.72%	16.62%	-7.10%

Source: CEASA, National Advertising Expenditure excluding Classifieds and Directories

## **MOVE in 2015**

But just as the media landscape has changed and evolved since 2010, so too has MOVE, by continuing to develop its measurement methodologies and provide new tools to its users.

The newly released software update – sub-areas – will enable users to analyse reach and frequency based on the audience geography, against income, age and more. This new addition allows media owners to build their own sub-areas and gives media agencies the ability to respond to client briefs more specifically.

Upgrades to report layouts make MOVE reports cleaner and easier to read, while additional map layers, called dot density, display the reach of a campaign as actual contacts (or dots). This new function combined with the existing heat map function (percentage reach) enables users to provide a more comprehensive visual of campaign reach.

The addition of mode splits to reports – contacts split by the mode of travel being used – mean clients can better understand how the audience is interacting with their campaigns – whether they're driving or walking past.

The final leg to the 2014 software update is the Compare Report feature which enables users to review two reports side by side allowing the user to check reports are based on the same geographical area.

Growth in population, road congestion and suburb density means OOH audiences are increasing. 2013–2014 year-on-year comparative reports show the same signage in MOVE has gained 3.4% in total contacts. OOH now reaches over 400 million people each day, and with new locations, new formats and new environments planned in 2015 this number will continue to soar.

## **The future of MOVE**

MOVE is currently analysing measurement methodologies for new formats and environments including Train Externals and Place Based locations. MOVE will also continue to review what is happening around the world regarding visibility scoring across all formats, including digital, for any possible enhancements to the LTS (Likelihood to See) methodology.

MOVE members are currently reviewing reporting data that will help users to understand the audience delivery of their interactive campaigns. With smart phone penetration doubling since 2010 and people using their mobile devices to research and curate content, campaigns that integrate OOH's reach with online (via mobile) will become more frequent in the future – with MOVE ready to help.

As media in Australia has evolved over the past five years, so has MOVE, and the OOH industry remains committed to ensuring that continues over the next five years and beyond.

## **Facts about MOVE**

- Move measures approximately 73,000 of the 85,000 OOH advertising faces including roadside billboards, posters, street furniture, railway stations, buses, trams, shopping centres and airports.
- It covers the five primary coverage areas Adelaide, Brisbane, Melbourne, Perth and Sydney. These are same geographical regions as measured by OzTam Metropolitan Television Ratings.
- MOVE is endorsed by the Media Federation of Australia and the Australian Association of National Advertisers. MOVE includes signage from 13 outdoor companies and is currently used by 58 agencies.
- The following OMA member companies have their signs measured by MOVE: Adshel, APN Outdoor, Bishopp Outdoor Advertising, goa, Independent Outdoor Media (iOM), JCDecaux, Metrospace Outdoor Advertising, oOh! Media, Outdoor Systems, QMS and Savage Outdoor.
- Executive Channel and Torch Media also have signage classified in MOVE, but it is unmeasured at this stage.
- MOVE data shows audience for Out-of-Home grew 3.6% in 2014 over 2013, when comparing the same group of signage year on year.
- Household travel surveys reveal 9 out 10 people will leave home each day.
- We make an average of 4.4 trips per person per day.
- On average Australians look at 26 Out-of-Home signs each day according to the 2014 LTS scores for all signage.

## **ENDS**

### **FURTHER INFORMATION:**

Charmaine Moldrich, CEO, Outdoor Media Association and MOVE  
T: 02 9357 9999 M: 0407 418 273

## **About MOVE**

MOVE is Australia's premier quantitative audience measurement currency for Out-of-Home (OOH) media, covering major OOH environments including roadside, airports, railway/bus stations, buses/trams and shopping centres.

MOVE simplifies the planning and buying of OOH by producing audience measurement results for any combination of formats or tailored packages. As well as providing results numerically, an inbuilt mapping functionality visually displays the reach of a campaign against the chosen demographic and market(s).

MOVE enhances the standard measurement of target audiences, Opportunity To See (OTS), by reporting the active audiences through Likelihood To See (LTS). LTS is a quantitative measure that enables MOVE to account for the traditional passive audience interaction.

LTS accounts for a number of visibility factors; values assigned to either the advertising face itself or the person passing the face within different audience environments. Visibility factors include the individual's mode of transportation, speed and viewing location, as well as face metrics such as visual size to the audience and illumination.

Note that LTS is neither a qualitative measure of the sign nor the audience.

MOVE is endorsed by the Media Federation of Australia (MFA) and the Australian Association of National Advertisers (AANA).