

outsid@info

Providing news and analysis on the Australian outdoor media industry

Public see role for outdoor advertising in community

New public attitudes' research conducted by Nielsen showed almost 90% of people were either supportive of, or neutral towards outdoor advertising in the community.

And they were even more supportive when they knew it subsidised public infrastructure or provided free and discounted space for charities and community events.

The online survey was launched in June 2007, attracting 606 respondents in Sydney, Melbourne, Brisbane, Adelaide and Perth. Data was weighted to population proportions and respondents were aged 18-54 years and used transport at least 1-2 times a week.

Key findings of the research included:

- People see a role for outdoor advertising in the community with 49% rating its role as positive and a further 38% neutral to it (only 13% negative);
- The things people like most about outdoor advertising is that it is entertaining or humorous (61%) and clever and creative (60%);

- 86% agree or strongly agree that it is useful to have a website address included in outdoor advertisements;
- 59% of people said their view of outdoor advertising was more positive when they knew free and discounted space was provided to charities and for community events;
- 57% of people said their view of outdoor advertising was more positive when they knew it subsidised the construction, cleaning and maintenance of public infrastructure such as bus shelters and pedestrian road bridges;
- 87% of people thought it important that outdoor advertising continued to subsidise community infrastructure;
- Entertainment and leisure advertising are the most preferred categories of outdoor advertising with 68% of respondents saying they liked to see outdoor ads of this type, closely followed by holidays (59%) and airlines / travel (50%).

- 92% of people said that they found outdoor advertising appealing for road safety campaigns. It was also appealing for advertising local community services (88%), charity campaigns (84%) and government services and campaigns (74%);
- The thing that people most disliked about outdoor are advertisements which are difficult to read from a distance or are visually unattractive - emphasising the importance of good creative.

The last research on public opinions of outdoor advertising was in 2000 when 32 per cent of respondents indicated a dislike of outdoor advertising, highlighting a positive shift in attitude toward the media.

This mirrored recent research undertaken in Auckland, New Zealand, where there was also a low negative response towards outdoor advertising.

GCU presentation

OMA CEO Helen Willoughby recently joined other industry associations to present at Canberra's annual Government marketing workshop.

The workshop was attended by media and marketing personnel from a wide range of Federal Government departments. It provided the opportunity for each industry to offer insights into how best to use their media.

The OMA used the opportunity to show participants the "Mind Control" video for which it acquired the rights from a British television station two years ago. The video is a clever illustration of how external messages influence people's thinking.

Out there

This clever out of home campaign was developed by Scholz & Friends Berlin for European job search site, jobsintown.de.

The advertisements appeared on public washing machines, petrol pumps, ATM machines, car park

pay stations and coffee machines. Different creative executions were created to suit each medium, all featuring the tag line "Life's too short for the wrong job". The campaign received international recognition.





'New look' for creative awards

The Outdoor Media Association (OMA) is conducting a complete review of the industry's creative awards, previously known as the ONE Awards, so that they directly target the creative community.

The OMA launched the industry's first creative awards in 2005 to raise the profile and standard of outdoor advertising in Australia and to reward the best creative work. The awards attracted 270 entries in 2006 which was a slight increase on 2005, with the winning creative team receiving a \$10 000 cash prize.

In 2006 the OMA commissioned independent research by The SEED to seek feedback from the creative community as to their knowledge of, and attitude towards the ONE awards. The research found that there was low awareness of the ONE Awards among its key target group (creatives) but a positive attitude towards creative awards in general.

All aspects of the awards program are being reviewed from the entry process to the branding. Some decisions have already been made such as changing the call for entries process from two to one which will include only one judging session. The judging panel will now include mostly senior creative directors and the prizes are also being altered so that they are of greater appeal to creatives.

In re-positioning these awards, the OMA is seeking the services of a creative agency to develop an innovative and high quality campaign. The OMA plans to launch the new awards in November this year.

State round up

Victoria

Following discussions with the Minister for Planning and a presentation to the Signage Advisory Committee, the OMA has received advice about an amendment to the Victorian Planning Provisions which effects large format (major promotional) signs granted a permit between 19 September 1993 and 18 September 1997.

These permits were originally due to expire in September 2007, however the date has been moved back to September 2008 pending the result of the signage review currently being coordinated by the Department of Sustainability and Environment.

This means OMA members that own signs that had a permits approved in the effected time frame will not have to apply for new permits or permit extensions for another year, and that these signs should be treated consistently with the amended planning provisions when they are finalised.

The OMA has put a submission to the Committee and will continue to work with Victorian members on the review.

South Australia

The Independent Gambling Authority has completed a review of codes of practice - "advertising" and "responsible gambling". Implications from the review include determinations that:

- External signage at the Adelaide Casino, SA TAB and SA Lotteries outlets should be "appropriate" and "proportionate to" the activity conducted.
- Some pubs and clubs will not be allowed to advertise externally that they have gaming machines.
- There will be six new gambling messages introduced, which advertisers will be required to rotate through every six months.

The codes of practice are now being reviewed, and are expected to go through the State Parliament later this year or early next year.

For more information, call the OMA on 02 8356 9000 or go to http://www.iga.sa.gov.au/pubcons/review06/Final_17May07.pdf

New South Wales

A decision on exhibited changes to *State Environmental Planning Policy No.64 – Advertising and Signage* is expected soon following submissions to Planning NSW.

The proposed changes focus on ensuring outdoor advertising benefits the community and mostly relates to advertising in major road and rail corridors.

The OMA will monitor the application of any changes to the existing policy, particularly the proposed public benefit test.

Arrangements are currently being made for lawyers, cutler hughes and harris, to provide a briefing on the changes to SEPP 64 in late August which will be free for members to attend.

The OMA will advise members of the briefing session in due course.

Queensland

The Minister for Local Government and Planning recently announced two reviews of local law, which in many areas of Queensland is the primary source of regulation for third party promotional signage.

The first is the Local Government Act Review, which is part of a wider reform agenda in Queensland, and which will likely have implications for the source of regulation for advertising and signage.

The second is a review of Model Local Laws, which are applied across all council areas subject to some local amendment.

The OMA will be examining the detail of both reviews over the coming weeks.

Useful Links

Please use the following links to access details on other industry inform

The Advertising Federation of Australia
<http://www.afa.org.au/>

Media Federation of Australia
<http://www.mediafederation.org.au/mfa.aspx>

Australian Direct Marketing Association
<http://www.adma.com.au/asp/index.asp>

Australian Association of National Advertisers
<http://www.aana.com.au/>

Advertising Standards Bureau
www.adstandards.com.au

Upcoming events

Marketing Committee Meeting:
3 September 2007

Regulatory Affairs Committee Meeting:
10 August 2007

Occupational Health and Safety Meeting:
13 August 2007

Board meeting:
21 August 2007

Frequently asked Questions

What is MOVE?

MOVE stands for Measurement of Outdoor Visibility and Exposure and is the first industry-wide audience measurement system to be developed for the outdoor media industry in Australia.

It is also the name of the company established in June 2005 to deliver the project on behalf of the OMA.

Ian Muir, founder and former CEO of the OzTAM television ratings system, is MOVE's project manager, and Helen Willoughby acts as the project sponsor on behalf of OMA Members and the MOVE Board.



Above - Ian Muir, who heads the Technical Committee

Why is MOVE necessary?

Apart from being an important internal planning tool for OMA Media Display Members, MOVE will provide media buyers in Australia direct access to audience measurement data for the first time. This will help place outdoor on a level playing field with other media such as television, newspapers, magazines and radio, which already have established measurement systems in the market.

This system will provide authorised users with an innovative, web-based tool to determine the effective reach and frequency of outdoor media campaigns. Once launched, MOVE will be the only audience measurement system endorsed by the OMA, the Media Federation of Australia (MFA) and the Australian Association of National Advertisers (AANA).

Who owns MOVE and how is it being funded?

MOVE is currently owned by its shareholders – the five major outdoor companies and the OMA (representing other OMA Media Display members). The five shareholders (APN Outdoor, EyeCorp, Network Outdoor, AdShel and JCDecaux) are collectively funding more than 90 per cent of the system's \$5 million development costs.

Other members will fund the remaining costs by way of a joining fee.

Who is building the new system?

MOVE has contracted VIEW Measurement, a consortium of Australian and international research companies, to build the audience measurement system.

The main contractor is Veitch Lister Consulting, a successful transport and travel planning consultancy with access to large volumes of data necessary for the project.

Other members of the consortium include Access Testing (eye tracking), Taylor Nelson Sofres (surveys) and Cuende Infometrics (Spanish consultant). David Rogerson is VIEW's CEO, with Grant Guesdon providing operational and technical input.

When will MOVE be launched?

MOVE is expected to be launched to market in the second half of 2008.

What is driving the timeframes?

MOVE will measure more than 50,000 outdoor 'faces' using a comprehensive range of data and mapping technology to determine likely audiences. This requires significant amounts of data collection and analysis, including six proprietary surveys to accurately measure the visibility of, and variability between the out-of-home environments, including shopping centres, airports, roadside and transport.

Some data needs to be collected over a 12 month period to take into account how different seasons impact upon travel behaviour. The airport survey is an obvious example and this work will not finish until the end of this year.

Once all surveys have been completed, the data will need to be incorporated into the new system and software built to fit the users' requirements. This will occur in late 2007 and the first quarter of 2008. Three months has then been allowed for internal training and any refinements then needed to the system.

What is the Joint Industry Committee?

The Joint Industry Committee is the group representing the Outdoor Media Association (OMA), the Media Federation of Australia (MFA) and the Australian Association of National Advertisers (AANA). It was established to facilitate the tender process and awarding of the contract for the development of MOVE.

Message from the Chairman



Above - MOVE Chairman and CEO of JCDecaux, Steve O'Connor

We are now almost halfway into development of Australia's first industry-wide outdoor audience measurement system – Measurement of Outdoor Visibility and Exposure (MOVE). This represents a significant step forward for all outdoor media operators and associated suppliers given its importance to the long-term growth of the sector.

The new system will enable outdoor operators to provide accountable and transparent data on reaching audiences, as well as offering media buyers and our own staff a useful planning tool. MOVE will be a leader in the field of outdoor measurement given it will be the first system globally to cover all outdoor formats.

Almost \$5million is being invested in developing MOVE, representing the largest investment in research made by the Australian outdoor industry. Work to date has been on collecting the supplementary survey data required to construct the system, and on commencing the eye tracking fieldwork. Eye tracking will help determine the 'weighting' of factors impacting a person's likelihood to see outdoor advertising, otherwise known as the Visibility Adjusted Contact (VAC).

Building MOVE is challenging from a logistical perspective given that more than 50,000 outdoor faces will each require individual scores, and that audiences will be derived from hundreds of thousands of individual surveys. Many people are involved in this project and the MOVE Board would like to acknowledge all those who have, and will continue to contribute to its successful delivery.

Role of the Technical Committee

Two years ago the OMA Board established a Technical Committee under the banner of the Joint Industry Committee (JIC) to progress the audience measurement project.

The Committee was headed by Mr Ian Muir, the founder and first CEO of the OzTAM television ratings system. It included senior representatives of the major OMA companies and representatives of the Media Federation of Australia (MFA). The Australian Association of National Advertisers (AANA) was also invited to send a representative.

The Technical Committee advised the Board during the tender evaluation and continues to provide advice on the project's ongoing progress. Its members, who meet quarterly, are:

Ian Muir - Chairman
 Daniele Cardillo – APN Outdoor
 Janine Wood – EyeCorp
 Anthony Xydis – AdShel
 Ed Harrison – JCDecaux
 John Grono – MFA
 Rachel Nolan – MFA*

* Rachel is currently on maternity leave.

Role of the MOVE Working Party

A broader group, including representatives of VIEW Measurement and the OMA, has formed to provide input and oversee progress of the MOVE system.

The group, also headed by Ian Muir, includes some members of the Technical Committee as well as additional representatives of the Shareholding companies. Members are responsible for signing off on survey methodologies and project protocols and procedures, as well as ensuring ongoing communication and feedback between the client (OMA/MOVE), the contractor (VIEW Measurement) and the MFA.

Role of the MOVE Board

The MOVE Board is responsible for the project's governance and all strategic and commercial decisions impacting its development. The Board receives recommendations from the Technical Committee and regular presentations from the VIEW Consortium.

Steve O'Conner, JCDecaux's Chief Executive Officer, has been appointed Chairman of the Board.

Current members include the CEOs of all other Shareholding companies, the MOVE CEO and one independent appointed by the OMA.

Shopping Centre surveys complete

More than 7,000 interviews have been conducted across nine Sydney shopping centres to determine how people circulate within retail outlets. The results of these interviews will be used to provide specific measurement data for each category of shopping centre – from neighbourhood centres through to the large CBD department stores. This information is necessary to build a model that maps people's travel within shopping centres against the placement of in-store advertising.

The next step will be to combine these survey results with already available data as to the numbers of people traveling to shopping centres, their purpose of journey and the mode of transport used.

The shopping centre model will be an advance on global audience measurement systems which traditionally have focused on roadside advertising.

MOVE Road Show

Presentations to update staff on the audience measurement project have commenced, with most operators in Sydney and Melbourne now fully briefed. MOVE CEO Helen Willoughby has been conducting the presentations and answering questions.

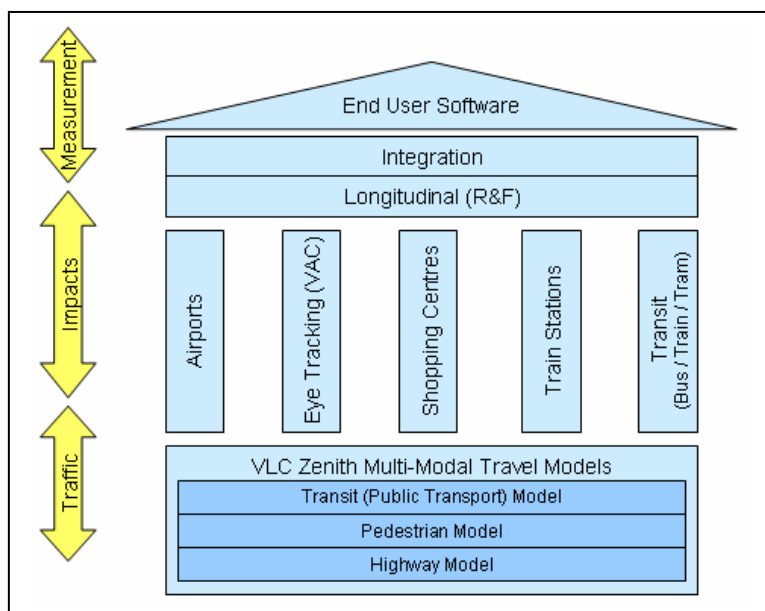
The next series of presentations to staff will occur in the other states over the coming weeks.

Following staff presentations, the road show will move to media buying agencies and other stakeholders as required. A briefing of the MFA Executive is scheduled for 10 August 2007 and media buying agencies will receive presentations shortly thereafter.

Site Classification

All outdoor companies involved with the audience measurement project have been collecting specific information about their inventory for each of the five major capital markets of Sydney, Melbourne, Brisbane, Adelaide and Perth. This data will form the base of the new system with each outdoor face to receive its own MOVE Identification.

The Brisbane market has been the first to provide the necessary site information, which included fieldwork to measure the height and orientation of all outdoor faces. This information is currently being validated by VIEW and operators should soon receive return lists for updating and re-checking. Once this desktop exercise is complete, the OMA will coordinate a self-industry audit to ensure that fieldwork measurements have been recorded accurately. This will involve operators checking a percentage of other company sites that will be provided by the OMA following consultation with VIEW.



A model demonstrating the key elements of the MOVE system.