



December 2009

Inside Outdoor

Providing news and analysis on the Australian outdoor media industry

This month's edition features • Out-of-Home highlights for 2009 • Farewell 2009

Farewell 2009

Next year is looking good



Four years ago when I accepted the offer to become the Outdoor Media Association's first Chief Executive Officer I had no idea just how vibrant and progressive an industry I was joining. As a former client of advertising I had always been a fan of outdoor media because I knew instinctively of its exposure to mass audiences. However, I was ill-informed as to the breadth of outdoor's potential and of the extent to which the industry was embracing new technologies.

There is no doubt about the outdoor media industry's ability to reinvent itself. One has only to look at the changes that have occurred since the banning of tobacco advertising in the mid-1990s, including the growth of street furniture and retail, the profiling of outdoor during the

2000 Olympic Games in Sydney, or the introduction of the first digital electronic billboards, to realise this fact. It is also very much a global industry bounded by a common belief that this media, above all others, has the ability to make a statement.

2010 will be another big year for outdoor media in Australia. This will come as no surprise for those of us who have over the past few years lived and breathed MOVE – Australia's first national audience measurement system for outdoor media which is enticingly close to completion. Those working on the project already know the comprehensive nature of the data and the depth to which the industry has gone to deliver as accurate as possible audience measurement results for advertisers and media buyers. The launch of MOVE on 23 February 2010 will signal the start of true accountability for the outdoor media industry in Australia.

Of course, MOVE will not be the only success story of 2010. The OMA is already well advanced on the planning for the

second Outdoor Awards which proved so successful when launched among the creative community in 2009. We have also awarded our third international Young Planners' Scholarship and have commenced a number of important research projects.

All this has been possible because of the support of our members and stakeholders. We thank you for continuing to fly the flag for this exciting industry.

As many of you already know I will be leaving the OMA towards the end of January 2010 to take up a position with the Federal Department of Education, Employment and Workplace Relations. This was a very difficult decision for me mainly because of the people who make up this industry. I don't think I will again meet quite such an eclectic, visionary and determined bunch. However, I know I leave the ship in great hands and that 2010 will be another major turning point for outdoor media in Australia.

Seasons Greetings

To our valued members and stakeholders, we wish you a very joyous festive season with your family and friends.

Thank you for all your support throughout the year.

Out-of-Home highlights for 2009

Despite an economic downturn, it's been a year of innovation, insights and expansion for the media companies in the Out-of-Home sector in 2009. The industry constantly strives to provide more for clients and their agencies by making the medium easier to plan and buy, providing insights into their audiences and through creative solutions to maximise impact for advertisers. Some of the major highlights of 2009 are detailed below. For more information about these initiatives contact the media company via their website listed.

APN Outdoor

Airport

APN Outdoor launched the largest ever billboard in Australia in July, atop Sydney International Airport's new Terminal 1 car park. Eight stories off the ground, and 100 metres facing north and west, the site is a massive 42 times bigger than a standard Supersite and reaches an affluent air traveller audience. In September, APN Outdoor launched a large format static digital billboard at Sydney Domestic Airport, the first of its kind at any Australian airport external.



Planning tools

APN Outdoor also invested heavily this year in a suite of planning tools which provide greater insight and accountability and make buying outdoor easier:

1. Profiler – a proximity planning tool which enables clients to reach consumers close to the point of purchase;
2. Compass – a proprietary cross format outdoor planning tool; and
3. My Life – a sophisticated geomapping

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system which allows APN Outdoor to connect a client's message with specific demographics, buyergraphics and other niche segments.

APN have also continued to track campaigns through their ongoing tracking monitor.

www.apnoutdoor.com.au

Adshel

Adshel Mobile, Scooters, Sampling and Experiential

Adshel is forging ahead in the world of mobile marketing and Out-of-Home integration with QR Codes, SMS, MMS and a sophisticated Bluetooth network. At the backbone of the offering is a 200 site Bluetooth intelligently linked network which allows advertisers to deliver branded content direct to their customers while out of home.

This summer Adshel clients can add more to their campaign through Adshel's new partnership with Media V scooter advertising and sampling and Maverick non-traditional experiential executions.



Championing Creative Excellence

Adshel and AWARD teamed up to host a Creative Challenge event for the Sydney Theatre Company which aimed to promote creative excellence in the outdoor medium and encouraged leading creative agencies to bring their ideas outdoors for STC. The winning concept is a world-first; an interactive play delivered through a provocative poster visual and the audience's mobile phone.

Following on from the Creative Challenge, Adshel have established a quarterly award

for the best campaign on the Adshel medium. The award aims to promote creative effectiveness in outdoor and get senior creatives talking about lifting the bar in outdoor executions. The initiative is supported by AWARD.



www.adshel.com.au

EYE

This year EYE saw strong support from advertisers who have seen the value of targeted audiences and precincts. The combination of EYE's audience sets: the Flyer, Shopper, Driver and Student, quality environments and product innovation have provided advertisers with a strong and powerful medium to reach consumers.

EYE conducted a number of research and insights projects including the release of EYE Study – Eye Tracking results conducted in Auckland University providing insight into how students view both digital and static advertising on campus.

EYE built on an extensive eight-year history of Eye Shop consumer insights with research in January 2009 to evaluate the EYE shopper in a new economy, and a new study highlighting consumer attitudes to media placement in the retail space.

EYE conducted an airport effectiveness research study through Hoop Insights in 2009 which reinforced the value of Eye Fly media. The objective of the study was to further develop depth and knowledge of Eye Fly's domestic audiences by profiling who they are, where they dwell, how much they spend, how often they travel and for what purpose.

EYE were awarded a silver POPAI for the 20th Century Fox campaign, *Meet Dave* that was featured on shopping centre Eyelites nationally and included an interactive component which enabled consumers to navigate through the various components of the movie's main robot character, Dave.

In addition EYE worked with Nokia to creatively launch their new Nokia N97 handset on customised Eyelites which incorporated a live feed from the internet displaying the latest news and weather updates.



www.eyecorp.com.au

JCDecaux

Brisbane Bike win

In January 2009 JCDecaux announced that it had been selected by competitive tender to provide Brisbane City Council with a self service bicycle hire scheme. The exclusive 20 year contract with Council covers the design, supply, installation and ongoing maintenance of 150 self-service docking stations for 2,000 bicycles within Brisbane CBD and surrounding inner metropolitan area for its 1.8 million inhabitants. The scheme, which will be partly funded by advertising, will employ up to 25 full-time staff, and support existing transport options such as Brisbane Transport's bus services as well as providing additional links to Universities and other key locations.

JCDecaux Express

In an effort to challenge traditional media platforms and be responsive to increasing pressure on client lead times, JCDecaux implemented "JCDecaux Express". "JCDecaux Express" means artwork for last-minute and time-sensitive campaigns can be received on a Friday afternoon and printed and posted on the streets by Tuesday morning, effectively reducing the traditional Out-of-Home lead time from 3 weeks to 3 days.

Innovative campaigns

JCDecaux have developed a large number of innovative campaigns in 2009. Some of these included the launch of their first Australian 'Scent' campaign in March

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which Fonterra used to promote their new Connoisseur Yoghurt, where an interactive button triggered a vanilla bean scented emission; an ING DIRECT dispenser campaign in May which dispensed packets of chocolate coated coffee beans during ING DIRECT's annual savings week; and in September a JCDecaux Innovate Showcase campaign promoting Bonds Tees by modifying existing bus shelter panels to act as a shop window to add impact and dimension to the Bonds campaign.



Fonterra scent campaign



ING DIRECT dispenser campaign



Bonds Tees showcase campaign

www.jcdecaux.com.au

oOh!media

Online Tool Kit

In April, oOh!media unveiled an online toolkit to provide agencies with a comprehensive campaign management solution which enables users to search for specific locations and sites across Australia, build an outdoor plan with mapping and site card capabilities and upload creative executions to view in-situ.

Quickcut online file delivery service

oOh!media teamed up with advertising services company Adstream to become the first Out-of-Home media company to offer the online file delivery service. Under the

new partnership, advertising agencies are able to work with the Quickcut software – which is the primary method for other print advertising – to prepare and validate artwork for large format and retail advertising panels and transfer it online to oOh! for production.

Interactive Microsoft campaign

oOh! delivered a groundbreaking interactive campaign for Microsoft when it rolled-out the first ever interactive digital retail advertising panels in Australia for a campaign to help Microsoft promote its campaign aimed at bridging the divide between politicians and the public. The 'Ask a Pollie' initiative gave the community the opportunity to vote on key issues via four touch screen ShopaLites located in shopping centres. The campaign was also supported by SMS ShopaLites and standard ShopaLites.



oOh! Insights in 2009

1. Australian Shoppers' Attitudes Revealed

In March 2009, oOh!media commissioned The Seed to gain insights into the attitudes of consumers within shopping centres and about different product categories. The study also found that consumers were receptive to retail advertising campaigns while shopping – 62% of main grocery buyers and 91% of teens noticed retail signage in varying locations.

2. How we really shop

In November 2009, the second phase of oOh!media's *How we really shop* research – commissioned to gain new insights into shoppers behaviour and attitudes – revealed that the average Australian shopper purchases 8.9 additional items than they had on their shopping list when they do their grocery shopping. More than three in four use credit cards or EFTPOS to pay for the extras.

3. Product sampling proves a hit in reaching consumers

oOh! commissioned research company Marketbeat to measure the effectiveness of retail activations as a complementary promotion vehicle to path-to-purchase advertising in Australian Shopping centres.

The findings show an increase in the effectiveness and popularity of experiential marketing in the retail environment, with 92 per cent of consumers wanting more product sampling to help them with purchasing decisions.



oOh!media launches unique experiential retail solution

With research showing the positive impact of sampling in purchasing decisions, oOh!media has introduced a new experiential solution to its retail offering – “ShopaLite Live”.

ShopaLite Live brings a standard oOh!retail campaign to life, with trained experiential staff located at key ShopaLite sites actively engaging with consumers to drive a positive brand experience within the purchasing environment by handing out product samples, vouchers or brand information.



www.oohmedia.com.au

Rova Media

2009 has been a monumental year for ROVA Media due to national expansion, a new high impact substrate and growth in new business. With ROVA's positioning established in Sydney and Brisbane, Perth and Adelaide markets were launched this year. ROVA also launched in 27 NSW regional towns, with Toowoomba and Gold Coast the first cabs off the rank for regional QLD, with further expansions scheduled for 2010. In terms of product innovation, a new reflective substrate has increased viewing distances, night time visibility and impact on the streets.



www.rova.com.au

TorchMedia

This year TorchMedia have increased their Shopperscapes portfolio, and are currently rolling them out across AMP Capital Shopping Centre car parks nationwide. This year has also seen the development of new Woolworths in-store formats such as the Squeeze and Sniff campaign for Cold Power Pure Essentials. Torch have recently developed a Retail Media format compatibility guide to help agencies plan their Retail Out-of-Home campaign. There has also been a growth in Torch's catalogue of research insights, with over 350 campaign studies commissioned, revealing the power of shopper media in driving sales and leveraging mainstream advertising campaigns.

www.torchmedia.com.au



Digital Out-of-Home forecast

Amid a sharp downturn in global advertising spending and a decline in traditional Out-of-Home advertising in 2009, digital Out-of-Home media is among the fastest growing media in the world and will continue on an upward

track in 2010, according to a new forecast from PQ Media, the leading provider of media econometrics. Spending in the emerging media segment of digital Out-of-Home (OOH) is on pace to increase 2.0% to \$2.47 billion in the U.S. in

2009, while digital OOH expenditures worldwide will grow 4.7% to \$6.69 billion. A free executive summary of the report titled **Global Digital Out-of-Home Media Forecast 2009-2014** can be downloaded from www.pqmedia.com or a full report is available for purchase.

State round-up

An OMA regulatory affairs update

NSW

There has been another change of Premier in NSW with former Planning Minister Kristina Kenneally taking over the reigns from Nathan Rees. Ms Kenneally has been supportive of the industry's attempts to make sensible amendments to SEPP64 so as to remove confusion and simplify processes. The new Planning Minister is former Police Minister, Tony Kelly.

QLD

DMR

The Department of Main Roads has responded to the OMA's submission on proposed changes to guidelines for roadside advertising on motorways. While DMR has agreed to permit signage in some locations where they were previously banned, OMA members in Queensland do not believe the DMR has gone far enough to address its concerns. The OMA will again respond to DMR outlining the areas of contention.

Queensland Rail

Changes to rail corridor access rules remain ambiguous despite promises from senior personnel at Queensland Rail (QR) to simplify processes for the outdoor media industry. QR officials acknowledge the industry's exemplary safe working record but have advised the new 'zero tolerance' rules apply to all users of the corridor. One suggestion from QR is to fence areas of the corridor where signage exists, thereby removing the need for train protection officers to be present while work is progressing. However, many Qld members have expressed concerns that this solution will prove impractical.

Out There

Local

JCDecaux launched a 'Special Build' campaign for Elizabeth Arden which used specially designed bright pink bows to promote their Juicy Couture Viva La Juicy fragrance at selected Citylight panels in Sydney and Melbourne this month. The Special Build bow is placed on the top corner of the Citylight panel and replicates the actual bow around the Juicy Couture Viva La Juicy bottle.

Elizabeth Arden's strategy behind the Special Build concept is based on increasing brand recognition. The challenge faced was bringing Juicy Couture, a relatively unknown brand in the Australian market to life, and creating a point of difference and talkability amongst the target audience, and encouraging trial and purchase.



International

Stella Artois: The Ritual Project

Stella Artois and Mother New York have commissioned a group of New York painters to create an outdoor spectacle of the brand's "pouring ritual." Over 21 days, the painters will hand-paint a 20 by 50 foot poster on the side of a building in SoHo, creating a stop-frame animation of the pour. Spectators can view the work unfolding through vintage viewfinders on site. **The Ritual Project**, which will include time-lapse film footage photos and interviews with the painters, will be brought to life as a short project documentary.



10 Global consumer trends for 2010

Get yourself up to speed on top global trends for 2010 and check out the latest report on trendwatching.com. One of the world's leading trend firms, **trendwatching.com** scans the globe for emerging consumer trends. The trends, examples and insights are delivered to 160,000 business professionals in more than 180 countries. You can sign up for free for monthly trend briefings.

ad:tech

ad:tech Sydney (an OMA partner), has just announced their first outstanding keynote presentation for the 2010 event. Sean Finnegan, President, Chief Digital Officer, Starcom Mediavest will bring his international perspective and experience to the program. As executive at the world's largest media buying agency, Sean will share the strategies and innovation behind truly understanding Starcom's target market. Hear about how they've delved into the hearts and mind of their consumers to



produce the most effect campaigns that thoroughly engage and connect.

Entry to the keynotes are free, find out more and register your place with priority code 'ATOMA' – www.ad-tech.com/sydney