



Inside Outdoor

Providing news and analysis on the Australian outdoor media industry

February 2010

MOVE audience measurement system launches

The first national, industry-wide audience measurement planning tool for outdoor media in Australia was launched this week at a breakfast briefing in Sydney attended by close to 300 members of the media and advertising industry.

MOVE, which stands for Measurement of Outdoor Visibility and Exposure, is also a world first in that it covers all major formats and environments, including roadside billboards, posters, street furniture, railway stations, transit, shopping centres and airports.

MOVE introduces a new and more accurate audience measurement currency – Likelihood To See (LTS) – meaning only those people who in all probability will see an outdoor advertising face will be included in the results. Most other media base their results on all people who have the ‘opportunity’ to see regardless of whether they do or not.

The five major outdoor media companies, APN Outdoor, EYE, Adshel, JCDecaux and oOh!media, along with the Outdoor Media Association (OMA), provided \$10 million equity and resources to develop the system over three years. A grant of \$830,000 from the Federal Government’s Industry Co-operative Innovation Program (ICIP) was also awarded.

The MOVE system was built by a consortium of Australian and international research leaders, headed by the Brisbane-based transport and traffic modellers, Veitch Lister Consulting (VLC). Simon Cooper, the architect of the United Kingdom’s successful POSTAR outdoor audience measurement system, was also a key participant.

MOVE Chairman Steve O’Connor said the system would greatly simplify the task of planning and buying outdoor media.

“The outdoor media industry has taken a giant leap forward today by delivering upon its promise to provide a fully transparent and accountable audience measurement tool that will be directly available to media agencies, advertisers and OMA members,” Mr O’Connor said.

“Users of the system will need to enter Access Agreements with MOVE. Access will be provided free-of-charge to media agencies until 1 September 2010 after which a payment system will be introduced.”



MOVE breakfast event



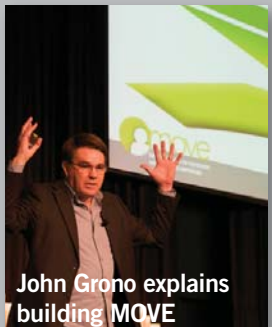
Carol Morris Executive Director MFA and Steve O’Connor MOVE Chairman



MOVE Board and speakers Steve McCarthy, Grant Guesdon, Ian Muir, John Grono, Mike Tyquin, Richard Herring, Steve O’Connor, Brad Bishop, Brendon Cook



Panel Discussion



John Grono explains building MOVE

Mr O'Connor said any funding from external users of the system would be limited to recovering some of MOVE's administrative costs, including third party items such as mapping and training services. He said the industry would cover all costs associated with system updates and enhancements.

MOVE will launch in all other major metro markets next week with almost 500 media agencies, advertisers and key stakeholders invited to attend. Brisbane's event will be held Monday 1st March, followed by Melbourne on Tuesday 2nd March, Perth Wednesday 3rd March and Adelaide on Friday 5th March.

Average Visibility contained within LTS Scores

The following table outlines, by format, the average retention of contacts for advertising faces. In other words, how much of the total Opportunity To See (OTS) contacts were kept on average for each face in the Likelihood To See (LTS) reported result. Variations within each format will occur, as each face is measured individually by the different audience locations and mode of travel.

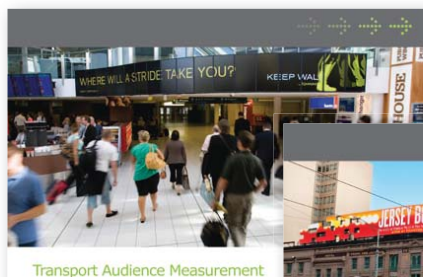
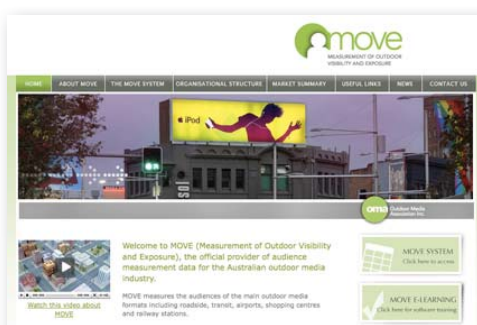
It is important to understand that these percentages are purely a mathematical result of LTS divided by OTS and expressed as a percentage. They do not give an indication as to the impact nor quality of the location, and are certainly not a trading 'currency' within MOVE for comparing different locations within a format or across formats.

MOVE measures each segment of the audience separately (e.g. different modes, different locations, different times of day, etc) and reports a final result for each face. As a result of this, it is possible for two faces to have very similar visibility to the same group of people, but due to the addition of another audience group the second face's final VI is different.

Bearing this in mind, the average Visibility Index of all faces measured for each of the formats, in 2010 data release is as follows:

Format	Average VI
Roadside B/B < 25sqm	39.0%
Roadside B/B 25sqm+	90.1%
Roadside Street – Bus/Tram/Kiosk/FSU	37.5%
Roadside Street – Phone Booth	30.1%
Bus/Tram External	34.5%
Retail	55.5%
Airport – Internal	64.6%
Train/Bus Station	68.5%

Please go the MOVE website www.moveoutdoor.com.au for more information about the system, including e-learning modules on how to use MOVE, a media kit detailing the methodology and different elements of the system and a short animated video.



MOVE thanks key participants and members

The OMA and MOVE would like to thank all those involved in the system's development.

Mr O'Connor, Chairman of MOVE, paid particular tribute to the VIEW Measurement team; Ian Muir, head of MOVE's Joint Industry Committee; John Grono, the MFA's project representative; and the other past and present members of the Joint Industry Committee members, for their commitment, passion and professionalism throughout the project's development.

He further acknowledged the MOVE Board members and operators' staff who had worked so diligently in preparing the system for market.

Many people have the Opportunity To See your advertising.
MOVE introduces Likelihood To See.



www.moveoutdoor.com.au

State round-up

An OMA regulatory affairs update

National

OMA driver behaviour research project

The OMA has met with a human factors specialist to refine the methodology for this project. Once the methodology has been finalised, field testing of participants will commence.

New South Wales

SEPP 64 review

The NSW Department of Planning has advised it is seeking legal advice on the draft provisions for Electronic Static Devices (digital signs) which are to be included in the revised SEPP 64. One issue of contention is the message dwell time for these signs which is yet to be resolved. The OMA will continue to monitor this situation closely.

Queensland

Restriction distances for outdoor advertising

The OMA has prepared a final submission to the Department of Main Roads in regards to their proposed amendments to restriction distances for outdoor advertising on the roadside. The OMA is currently awaiting member feedback on this submission.

Sustainable Planning Act 2009 (SPA)

The new SPA commenced in December, making the former Integrated Planning Act and associated Implementation note 10 for outdoor advertising redundant. The OMA has commissioned a Brisbane-based town planning firm to draft a new version of the Implementation note for the SPA to assist local councils in drafting planning schemes for outdoor advertising.

Local Government Planning Schemes for outdoor advertising

Tablelands Regional Council, North Burnett Regional Council and Fraser Coast Regional Council are currently seeking public comment on their existing planning schemes for outdoor advertising. The OMA is preparing submissions to all three councils.

Victoria

Vegetation management policy for outdoor advertising signs

The OMA is still waiting to hear from VicRoads regarding the status of their draft vegetation management policy for outdoor advertising signs in Metropolitan North West Region.

Victorian signage review

The Department of Planning and Community Development has advised that they are currently seeking legal advice concerning some draft provisions to the Victorian Planning Provisions that have arisen from the recent signage review. The OMA is likely to be consulted on any changes to these draft provisions.

Western Australia

Main Roads meeting

The OMA will meet with Main Roads Western Australia on 4 March to discuss the current status of roadside advertising in the State.

Behind the scenes of The Big Issue

Have you ever wondered what happens behind the scenes at The Big Issue? There are over 350 authorised vendors around Australia that are supported by a Vendor Support team in each State. Vendors call or text in from 8am to 4pm to book their pitch for the day.

Vendors pop in and out throughout the day to purchase their copies of the magazine for \$2.50 which they will then sell on the streets for \$5, keeping the difference. Some vendors will just drop in for a chat, seek some wise advice, relax with a coffee and share a few stories from their pitch. This day-to-day interaction and ongoing support boosts their self-esteem, builds a sense of community and promotes social inclusion for vendors.

Generally there will be 1-2 new vendors each day that the Vendor Support Manager will put through an induction and training process getting them prepared to sell. No matter what their background, everyone is welcome to sell The Big Issue magazine. After signing a code of conduct vendors receive their official, "The Big Issue" badge.

The OMA has been a proud supporter of The Big Issue since 2008.

Clarissa



A good fourth quarter

A lift in revenue for the fourth quarter of 2009 and the launch of MOVE has given the outdoor companies confidence for the year ahead. The net media revenue reached \$125.9m compared to \$124.6m for the same period in 2008.

This bounce back softened the overall fall in the full year results. Overall, the outdoor media sector fell 11.8% in 2009 compared to the previous year – \$453m to \$399m.

- Roadside Billboards (25 sq m and over) \$137.3m
- Roadside Other (street furniture, bus/tram externals, small format, taxis) \$149.5m
- Transport (including airports) \$56.7m
- Retail \$56.4m

Out There

Local

APN Special Build

APN Outdoor launched a Special Build campaign for realestate.com.au which provides home buyers with up-to-the-minute market data. Located in one of Sydney's busiest thoroughfares on Victoria Road in Rozelle, the billboard uses a specially designed LED panel to display exclusive property information from rpdata.com. Over the next six months, the site will display auction results, medium house and unit prices, the number of properties listed for sale and rental properties available in the Sydney area. Jenny Dickson, Consumer Marketing & Communications Manager for realestate.com.au said the outdoor site forms part of the company's strategy to provide property information anywhere, anytime and will offer consumers with an innovative channel to get quick property updates.



International

Is that for real?

Local Connecticut police were flooded with emergency calls in reaction to this billboard from concerned drivers who thought the mannequin was a real person. The BMW dealership responsible for the advertisement is pleased with the result, saying all the attention has caused a significant increase in vehicle test drives.



The 51st Congress of FEPE is to be held in Lebanon from 2nd-4th June 2010.



FEPE International is a worldwide association of outdoor advertising companies engaged in worldwide lobbying for outdoor advertising – with authorities, international organisations, political opinion formers and the communication media.

FEPE International organises an annual outdoor advertising congress with professional speakers. Organised by Antonio Vincenti, Chairman and CEO of Les Affichages Picasso sal, the leader in outdoor advertising in Lebanon since 1986, the congress is certain to be a great success.

The keynote speaker, Watts Wacker, is a futurist from the US, who has addressed the OAAA on a number of occasions and will be looking at the future of outdoor. Other speakers include Rachel Bristow who is head of Marketing for Unilever UK, Steward Williams, Deputy Managing Director of Sony Pictures, UK, Francois de Gaspe Beaubien from ZOOM Media – a digital company with screens in leisure centres and gyms across the US, Canada and Europe and Annie Rickard, CEO of Posterscope. There are more speakers to be finalised.

Plenty of social events and great weather. Registrations open early March – see www.fepe.com

ad:tech Sydney –
16th and 17th March,
at the Sydney Convention
and Exhibition Centre

ad:tech
sydney
16-17 march 2010

This year ad:tech have worked with a number of advisory councils to research and construct the 2010 conference content. There are three streams of tailored and targeted content addressing the most interesting and important issues affecting players in the interactive marketing industry right now.

Elvira Lodewick, Marketing Manager of Adshel will lead a discussion session with Nicole Moore, Marketing Manager of the OMA and Cate Smith, Marketing Director, Paramount Pictures Australia on **Out-of-Home – Mobile – Online: Engaging Your Customers Through the Entire Value Chain**. As Australians spend more time outdoors than ever before and the consumption of mobile content steadily increases there is mounting interest in new digital and mobile advertising opportunities being developed in Out-of-Home media.

Details on the full program can be viewed [here](#). Use the priority code ATOMA to book. Keynotes are free when you pre-register.