



April 2005



CONSUMER RESEARCH FINDINGS

POW CAMPAIGN FINDINGS

3 CONSUMER ATTITUDES TO OUTDOOR - REINFORCES MEDIA/BUYER FINDINGS

THE POW CAMPAIGN APPEARED ON THESE OUTDOOR FORMATS

LARGE FORMAT (supersites)

POSTERS (24 sheets)

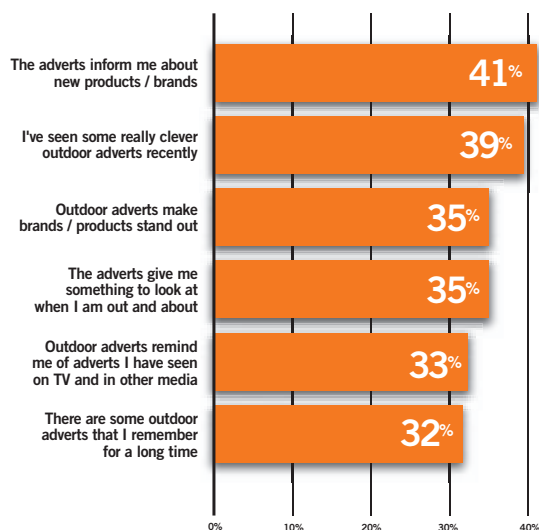
STREET FURNITURE (incl. shopping centre)

BUSES

TAXIS

AIRPORT (indoors)

ATTITUDINAL RESPONSE TO OUTDOOR ADVERTISING



In February this year, Australia's major outdoor companies joined forces to conduct the first ever multi-format outdoor advertising campaign entitled: "POW" Proving Outdoor Works.

The POW campaign appeared for four weeks across all the main outdoor formats in Sydney, Melbourne and Brisbane. In total, 10 media owners contributed \$1.3 million of media space and five printing companies covered the production costs.

The Outdoor Advertising Association of Australia (OAAA) commissioned independent research companies The Seed and Millward Brown to research media planner/buyers' and consumers' perceptions toward outdoor advertising and to assess the campaign effectiveness.

MEDIA PLANNER / BUYER RESEARCH FINDINGS

Independent research company The Seed conducted an online survey of 102 media professionals from Sydney, Melbourne and Brisbane during the last week of the POW campaign in February.

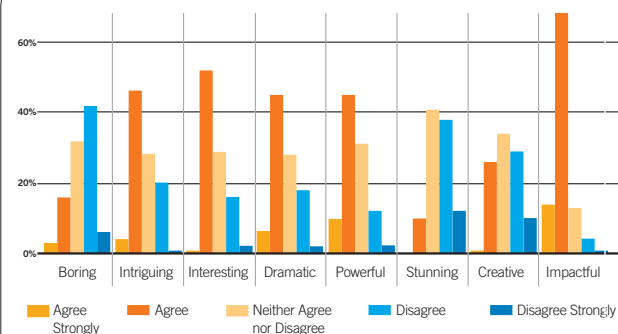
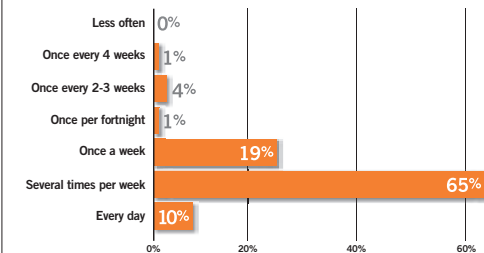
1 POW WAS NOTICED

- **High reach:** Over 91% recalled seeing the POW campaign during February.
- **High frequency:** The majority (75%) saw it 'every day' or 'several times per week'.

2 POW REINFORCED THE KEY BENEFITS OF OUTDOOR

- **Impact:** 82% 'strongly agreed/agreed' the campaign's prime attribute was impact.
- **Eye-catching:** 89% found the POW creative 'Very' or 'Quite' eye catching.

FREQUENCY



91% RECALL

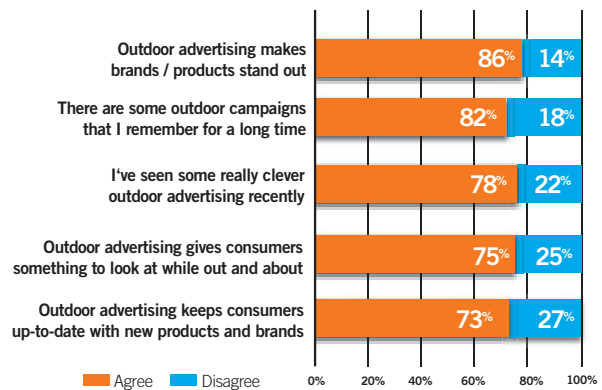




MEDIA PLANNER / BUYER RESEARCH FINDINGS

3 THE PRIME BENEFIT OF OUTDOOR IS IN GENERATING IMPACT

- **86%** agreed that outdoor helps 'make brands/products stand out'.
- **83%** regarded impact as a 'most important factor' when booking outdoor.
- **82%** strongly agreed/agreed that impact was the prime creative attribute of the POW campaign.

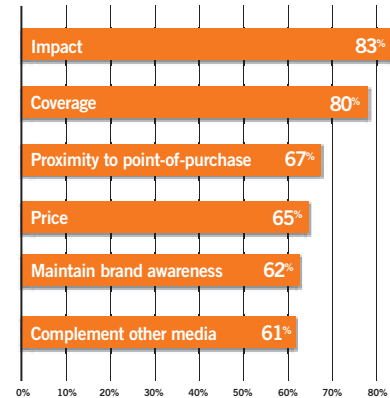


4 OUTDOOR ENJOYS GROWING LEVELS OF INDUSTRY RESPECT

- **It is high profile:** 70% see 'quite a lot' of outdoor advertising in their daily lives.
- **It is influential:** 65% say that seeing outdoor influences decisions 'quite a lot' or 'somewhat'
- **It is an improving medium:** 89% agree that it is 'much better than it used to be'

KEY BOOKING INFLUENCES

Research suggests that outdoor media is chosen for a multitude of reasons. Most media professionals selected the following six reasons for booking outdoor:



Feedback was received from media planner/buyers that was generally positive about the campaign:

"Clearly demonstrates the power of using multiple OOH formats."

"I think it is about bloody time the Outdoor Industry as a whole got together and put their individual business competitiveness aside for the betterment of the industry".

"I think the campaign is very visible, more so when you understand that POW is proving outdoor works."

"The creative was simple and clear, and what a lot of advertisers get wrong."

CONSUMER RESEARCH FINDINGS

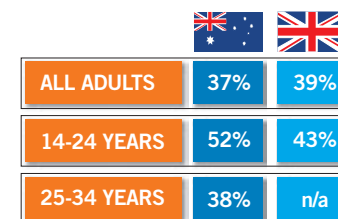
The following findings were obtained from an online study conducted by Millward Brown of **652** 14-64 year olds in Sydney, Melbourne and Brisbane. The survey took place over four weeks, starting mid February:

1 EFFECTIVE BROADCAST MEDIA

Research suggests over **3 million** people were impacted by POW

- **37%** of all adults recalled seeing the advertising in the last week of research.
- Highest recognition was achieved with **54%** of 14-24 year-olds, followed by **38%** of 25-34 year olds.
- Consistent with the UK experience.

SAW POW ADVERTISEMENTS DURING THE LAST WEEK OF RESEARCH.



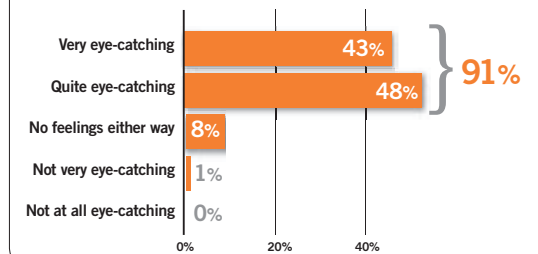
* Differences to the UK Campaign include.

- Australian campaign researched on-line and not face-to-face.
- The UK ran several creative executions; Australia featured the POW creative execution only.
- Australian results include total Eastern Seaboard; UK results include London only.

2 POW ACHIEVED CUT-THROUGH

Those who recalled the advertising found it eye catching and impactful.

HOW EYE-CATCHING DO YOU THINK THIS ADVERT WOULD BE IF YOU PASSED IT IN REAL LIFE?



RESPONSE TO POW CREATIVE: WHICH OF THESE WORDS DESCRIBES THE AD?

