



JCDecaux New Zealand

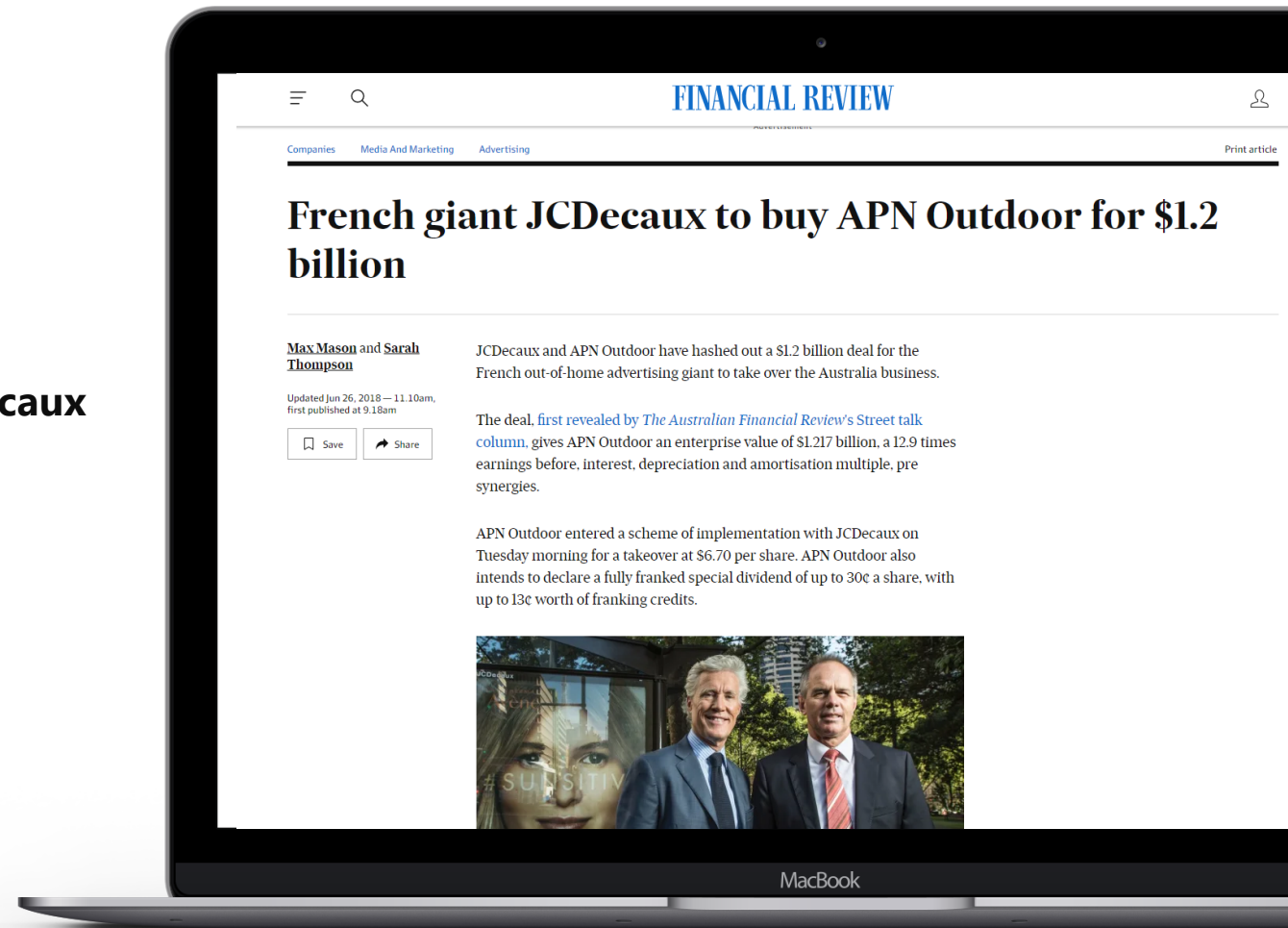
VISION FOR BUILDING BRANDS

JCDecaux

OVER A YEAR OF JCDECAUX NEW ZEALAND

2019 transition from APN Outdoor to JCDecaux

An important moment in JCDecaux's history, and an opportunity to enter the New Zealand market.



A CHALLENGING START TO 2020

Extreme disruption to brand marketing

As we focus on H2 and an economic recovery, **effectiveness of marketing spend** is of increasing importance.



IMPACT OF COVID-19

THE ECONOMIC IMPACT OF COVID-19 HAS SEEN **MARKETING AND ADVERTISING BUDGETS PUT UNDER THE SPOTLIGHT**

// There is nothing like having to rethink your entire year's plan to really understand what's important for the brand. **It's an exercise in ruthless prioritisation.**

JACK HINCHLIFFE

Marketing Director, KFC UK & Ireland



A close-up portrait of a man with dark, wavy hair and a mustache, smiling broadly. He is wearing a light pink button-down shirt. The background is slightly blurred, showing what appears to be a window or a wall with a grid pattern.

We believe **advertiser effectiveness is crucial to sustainable business**, for both JCDecaux and our clients

Harnessing **the growth potential for our clients is a priority and commitment** that we take very seriously.



We are data and technology driven, well placed to service an industry focused on effectiveness

JCDecaux

A large, circular tunnel of light rays, resembling a starburst or a lens flare, dominates the left side of the image. The rays are numerous and thin, creating a dense, textured effect that draws the eye towards a central vanishing point. The overall color palette is dark, with the light rays providing a stark contrast.

A LOCAL BUSINESS WITH **BESPOKE**
TOOLS AND SOLUTIONS

how brands grow

what marketers don't know

Byron Sharp

 University of
South Australia | Ehrenberg-Bass
Institute for Marketing Science

The Long and the Short of It

IPA

Balancing Short and Long-Term Marketing Strategies
Les Binot, Head of Effectiveness, adam&eve DDB
Peter Field, Marketing Consultant



In association with


WHY AREN'T WE DOING THIS?

How long term
brand building
drives profitability

By Peter Field

Conversations with partners in early 2020 highlighted a **return to brand building and long term effectiveness metrics**



HOW ADVERTISING WORKS

- Sophisticated mass marketing
(fame)
- Penetration
- Attention and saliency
- Long and short
- Emotional response **(feeling)**
- Heuristics (short cuts to meaning)
- Refresh & rebuild consistent
memory structures **(fluency)**



JCDECAUX INTELLIGENCE

We regularly conduct proprietary research studies to understand how people respond to and connect with our touchpoints.



In 2018, JCDecaux sought to understand **the factors that influence brand fame** by commissioning our first eye-tracking study

RESEARCH SHOWS THAT THE SUPERIOR LOCATION AND
PANEL ORIENTATION OF JCDECAUX TOUCHPOINTS
DELIVERS **GREATER ATTENTION AND BRAND FAME**

EYE TRACKING STUDY, 2018

MEANINGFUL
CONNECTIONS

**Attention
grabbing**

+60%

DELIVERING
HEIGHTENED
ATTENTION

**Looking
for longer**

+35%

ACHIEVING LONGER
VIEWING LENGTH

**More views =
engagement**

+38%

MORE VIEWS
ON AVERAGE

**More
memorable**

75%

STRONG BRAND
RECALL,
UNPROMPTED

GIVE
WAY

UNDERSTANDING
WHY JCDECAUX
TOUCHPOINTS
COMMAND
**GREATER LEVELS
OF ATTENTION
AND RECALL**

There are **six key attributes**
that make our network
more effective than others





Busy traffic locations optimised for high volumes of desirable audiences



Longer dwell times due to proximity to traffic lights

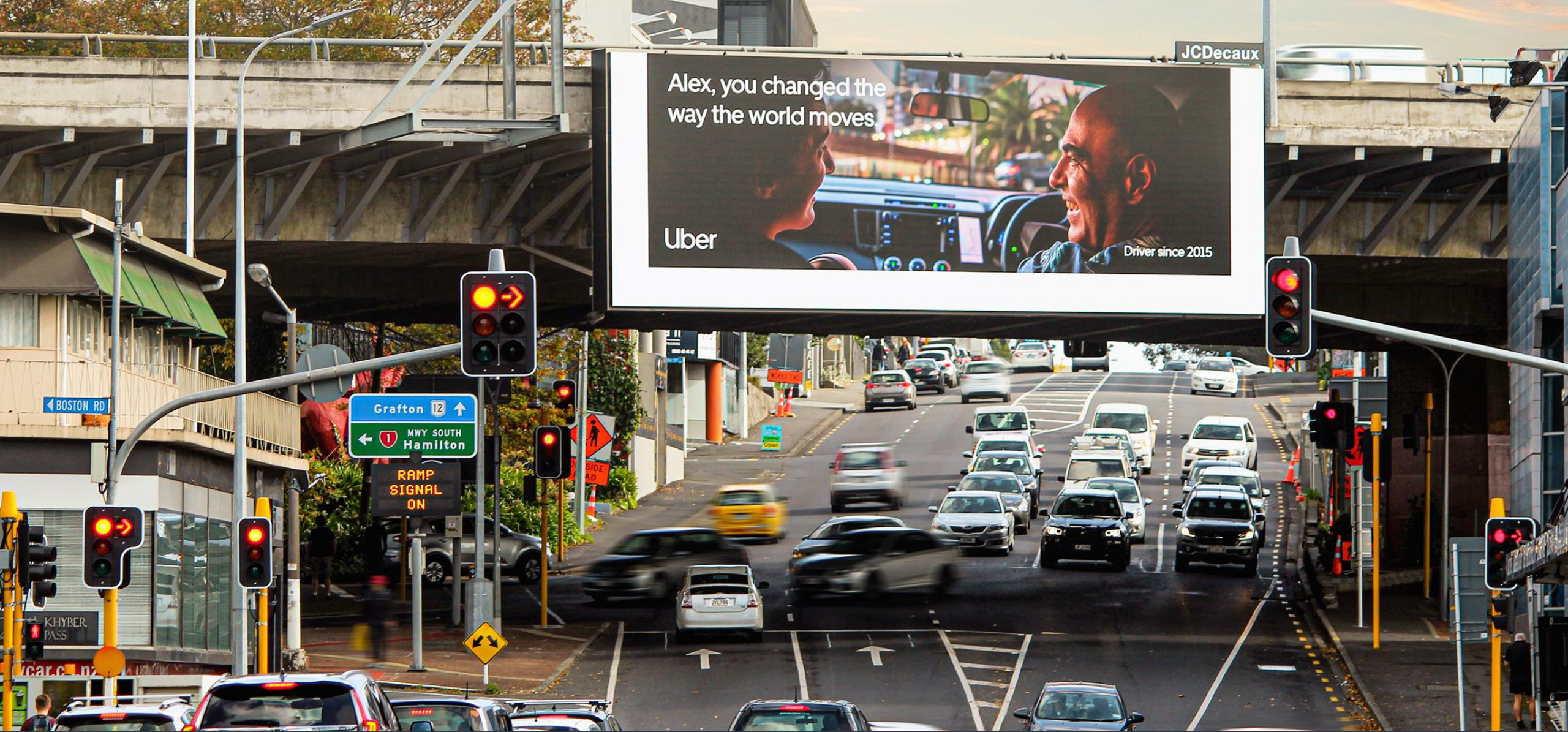
A WIN FOR BREAKFAST.
CONGRATULATIONS NZ WOMEN'S HOCKEY TEAM ON THIS MORNING'S RESULT.

Anchor
START STRONG
GO STRONG

JCDecaux



Ease of audience viewing with in-front and overhead panel orientation



JCDecaux

Alex, you changed the way the world moves

Uber

Driver since 2015

Grafton 12
← MWY SOUTH
Hamilton

RAMP
SIGNAL
ON

BOSTON RD

KHYBER
PASS



Longer viewing distances with greater visibility



The X-Class.
 X-Class X 250 d Power Assist
\$59,550 plus OBC*
 Limited time only. T&C apply. Visit your Retailer today.
 X-Class
 *Price is manufacturer's recommended price excluding on-road costs, available on standard specification X 250 d Power Assist, purchase and delivered before 31.03.20.
 Mercedes-Benz
 JCDecaux

THE CORNER



Greater share of time with minimum 15% digital SOV



Engage an affluent audience with exclusive Airport presence



HOW ADVERTISING WORKS

- Sophisticated mass marketing **(fame)**
- Penetration
- Attention and saliency
- Long and short
- Emotional response **(feeling)**
- Heuristics (short cuts to meaning)
- Refresh & rebuild consistent memory structures **(fluency)**

EFFECTIVE BRANDS REQUIRE **MORE THAN FAME**

01 FAME

Attention

Consumer becomes aware of brand or product

Interest

Shows interest in its brand benefits and how it fits in their lifestyle

02 FEELING

Desire

A subconscious emotional disposition based on trust (emotional and functional)

Action

Consumer forms a purchase intention, shops around, and decides to engage in a trial or make a purchase

Love

Advocacy, loyalty, return to purchase



JCDecaux

fiftyfive5

In 2019, we wanted to gain a greater understanding of **how JCDecaux Out-of-Home touchpoints impact measures of feeling**, so we commissioned a study with like-minded research agency FiftyFive5

Research **objectives**

#1

Identify any incremental impact JCDecaux Out-of-Home has on 'feeling' metrics

#2

Examine the value of JCDecaux formats when used in partnership with other media channels



How do you **measure feeling?**

01 —

Brand I trust

02 —

Brand I want to
tell others about

03 —

For people like me

04 —

Is interesting
and engaging

05 —

Offers
something unique

06 —

My preferred
brand

07 —

Seeing and hearing
more about

Research participants were shown a **variety of ad campaigns across a range of media channels**

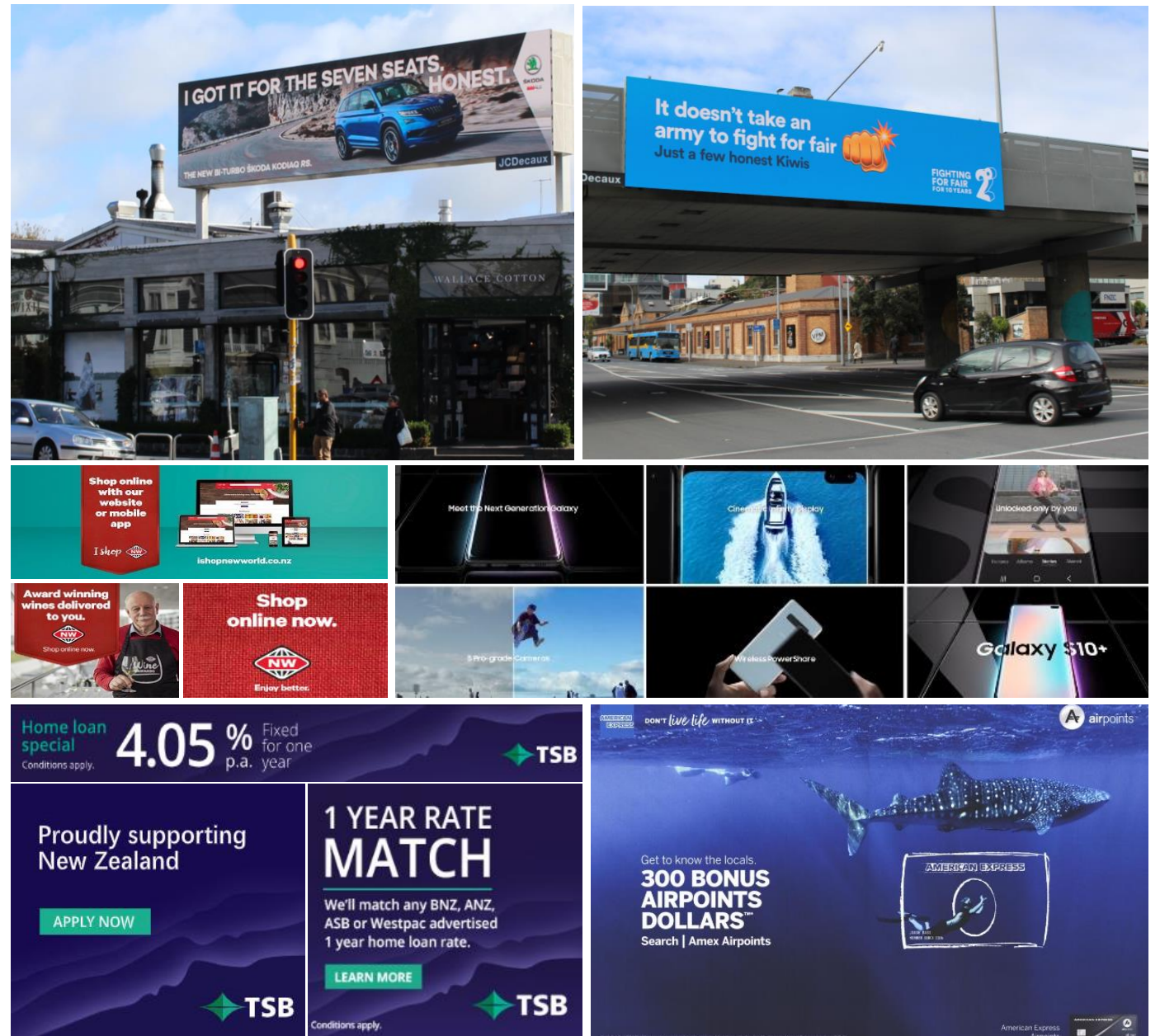
Ad campaigns included in the study were selected based on **category, media spend and range of channels used**

Range of brands included in each category to take out any 'brand effect' or personal bias

For Large Format, participants were **only shown images of creative on JCDecaux touchpoints**

If respondents **could not recall JCDecaux**, their responses were isolated as 'non-JCDecaux'

n=1,000 New Zealanders aged 18+



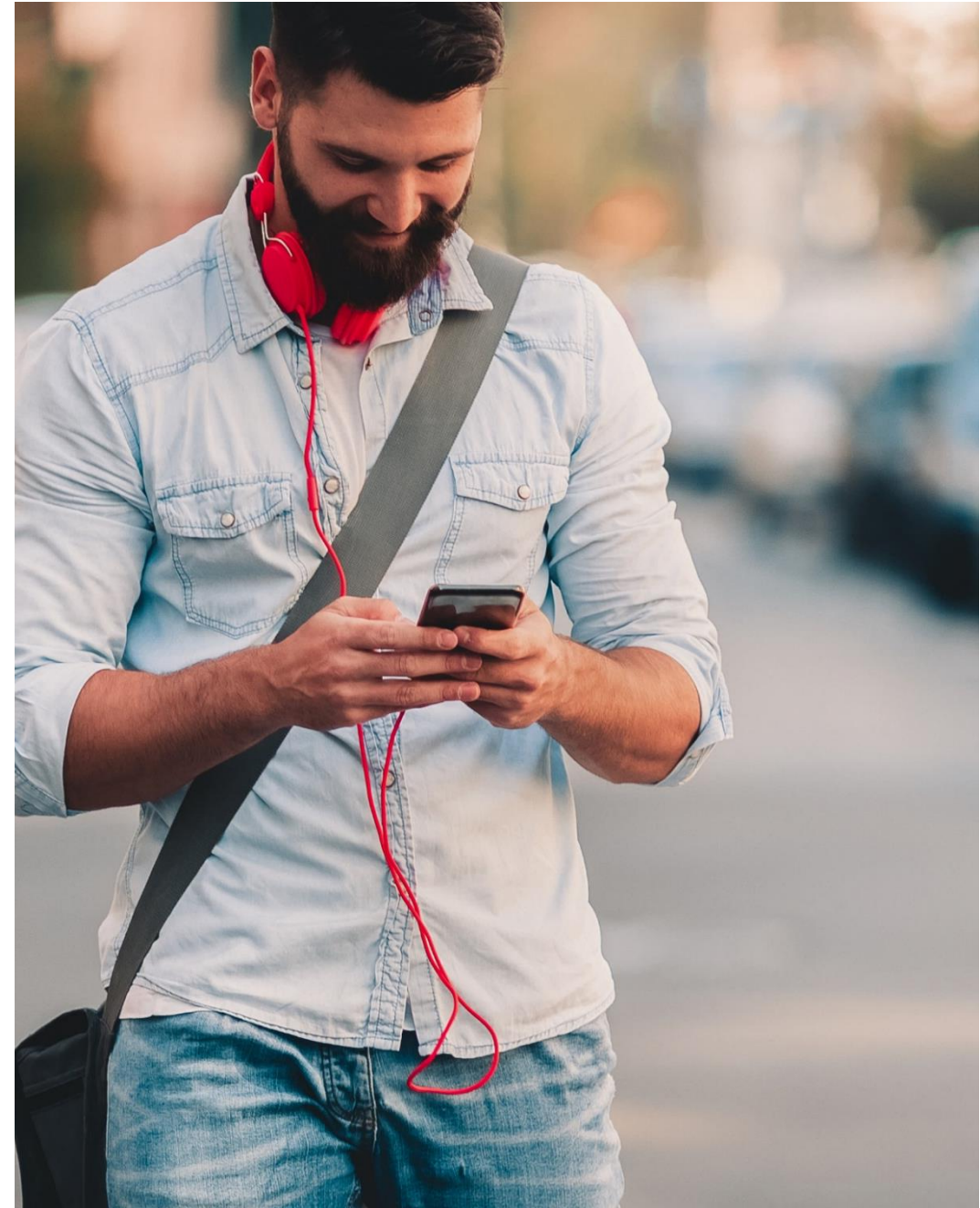
Combination of touchpoints across all campaigns selected

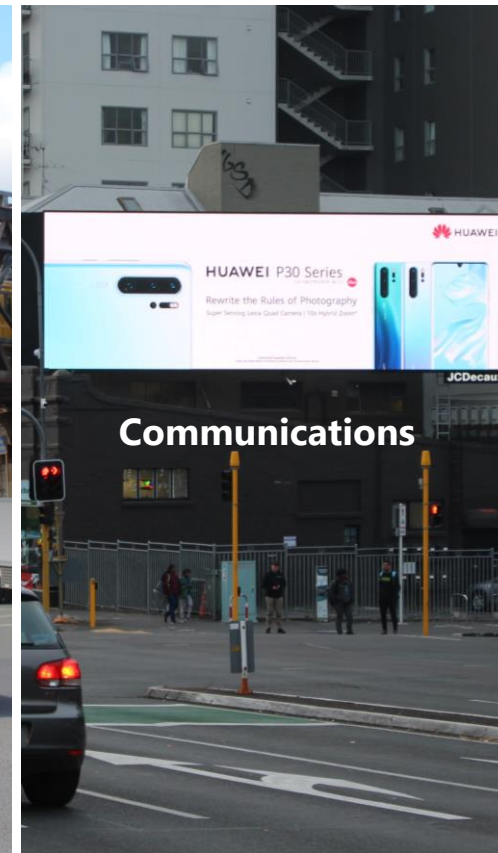
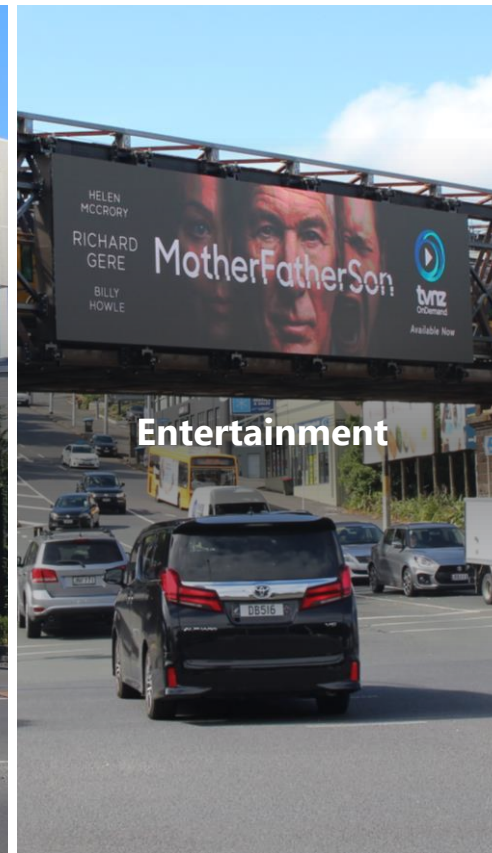
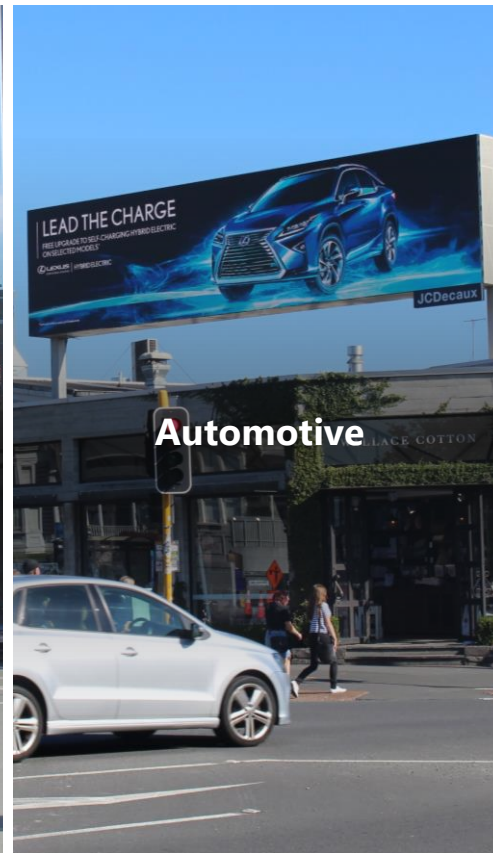
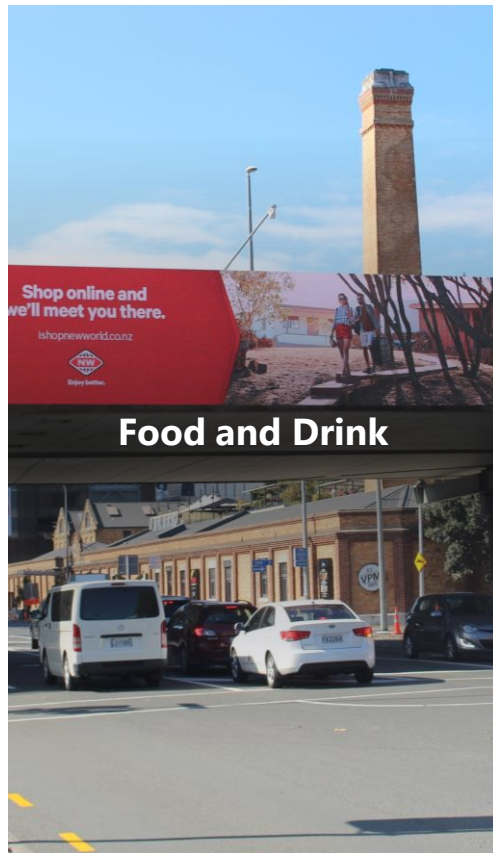
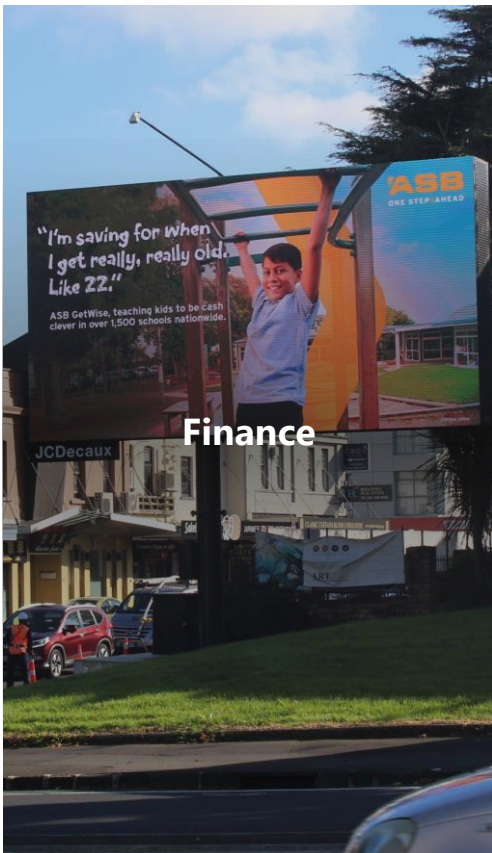
JCDecaux LARGE FORMAT

JCDecaux AIRPORT



TV
Online
Radio





Campaigns were selected across **five key categories**





RELEVANCE OF RESEARCH POST COVID-19

During uncertain times **people seek out trusted brands** with proven longevity



**Brands Bring
Certainty in
Uncertain Times**
by David Heitman

Brands are belief systems that provide certainty in uncertain times. During tough economic cycles, many will look to brands as safe havens of reliability and value.



SEVERAL INTERNATIONAL STUDIES
HAVE PROVEN THAT **OUT-OF-HOME**
IS A TRUSTED CHANNEL

+24%

Out-of-Home **boosts**
trust ratings for brands

Peter Field and Rapport.
Standing on the Shoulders of Giants Report.
An IPA Databank Study (case studies 2004 to 2016)

rapport
STANDING ON THE SHOULDERS OF
GIANTS

ix150

Out-of-Home **trust to**
usage index, ahead of TV
(ix106) and digital (ix74)

nielsen March 2020

“
We will be with our
friends again; we will be
with our families again;
we will meet again
”

Her Majesty The Queen
Message to the Nation



Photo: PA Media

INTERNATIONAL DEMONSTRATION



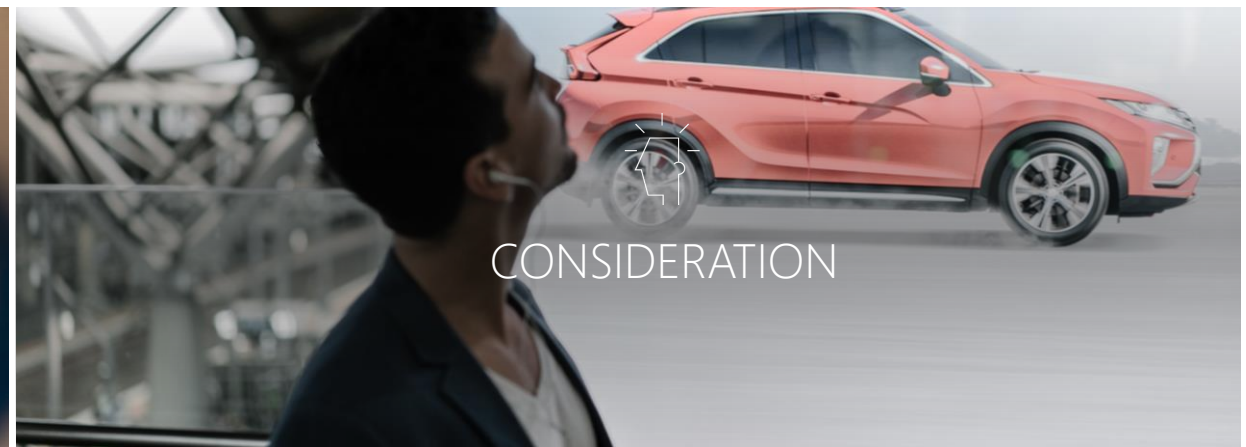
JCDecaux

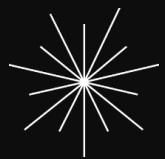
VISION FOR BRANDS

RESEARCH OF JCDECAUX
NEW ZEALAND TOUCHPOINTS



Four key metrics





+52%

Is interesting/ engaging

JCDecaux

fiftyfive5



Shop online for
a fresh catch.
ishopnewworld.co.nz

NW
Enjoy better.

JCDecaux

TURNING
TRAFFIC
GIVE WAY
TO
PEDESTRIANS



+28%
Is a brand I trust

JCDecaux | **fiftyfive5**



Galaxy S10+

JCDecaux



+42%

Is my preferred brand

JCDecaux

fiftyfive5



JCDecaux

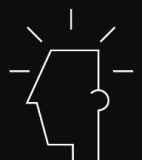
Keep your
home loan
on home turf

Home loan special

4.05%
p.a.

Fixed for 1 year

100% New Zealand
owned and here to stay.



+33%

Is a brand I would consider

JCDecaux

fiftyfive5

JCDecaux

fiftyfive5

Exposure to any JCDecaux touchpoints was shown to **positively impact brand feeling measures**

Is interesting / engaging

Is a brand I trust

Is my preferred brand

Is a brand I would consider



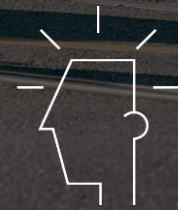
+52%



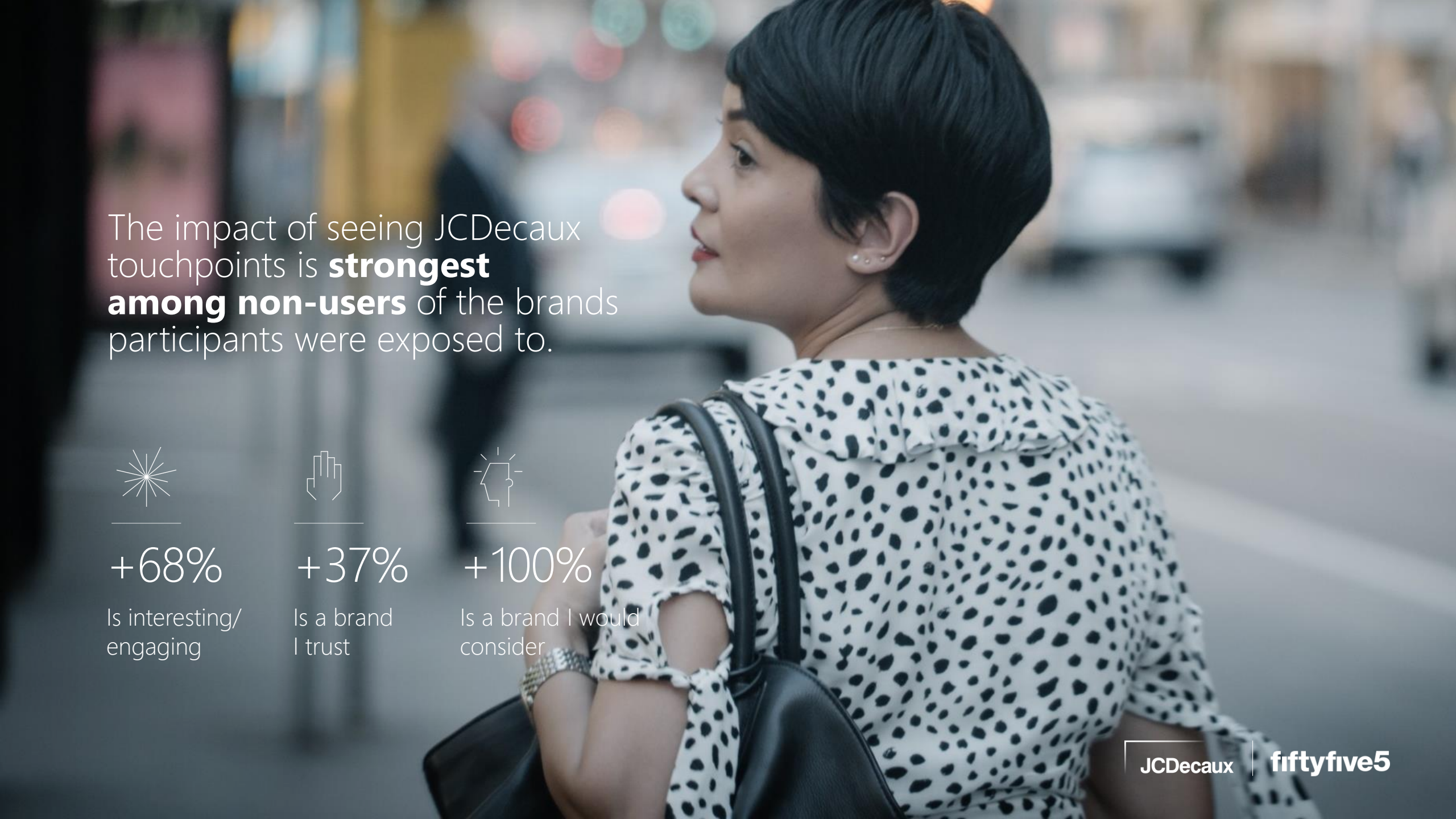
+28%



+42%



+33%



The impact of seeing JCDecaux touchpoints is **strongest among non-users** of the brands participants were exposed to.



+68%

Is interesting/
engaging



+37%

Is a brand
I trust



+100%

Is a brand I would
consider

Positive feelings were also seen from participants who were **existing users** of the brands they were exposed to.



+31%

Is interesting/
engaging



+34%

Seeing /
hearing
more about



+23%

Likely to
recommend

IN SUMMARY

Exposure to JCDecaux touchpoints **positively impacts brand feeling measures**

●
**Generates
positive feelings**

+33%

OVERALL
INCREASE IN
CONSIDERATION

●
**Appeals to
non-users**

+100%

INCREASE IN
CONSIDERATION
AMONG NON-USERS
OF EXPOSED BRANDS

●
**Validates
brand choice**

+23%

INCREASE IN 'LIKELY
TO RECOMMEND'
AMONG USERS OF
EXPOSED BRANDS

HOW OUT OF HOME WORKS

JCDecaux touchpoints **positively influence brand feeling** for a number of reasons

#1

Out-of-Home is **accepted and non-intrusive**

#2

Brands **seen in the 'real world'** are trusted

#3

Interest is piqued with commanding Large Format presence in desirable locations

#4

Frequency engenders trust and preference

#5

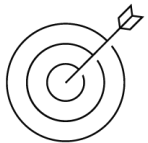
The **longevity** of Large Format influences current and future consumption

#6

Brands seen in relevant locations are **'brands for me'**

Automotive

The stature and prominence of JCDecaux touchpoints **drives brand preference in the automotive category**



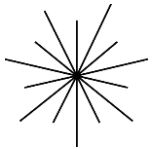
+308%

My preferred brand



Finance

JCDecaux touchpoints delivered particularly strong results in the finance category, **significantly impacting all brand feeling metrics**



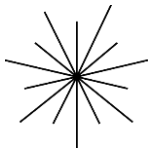
+110%

Is interesting/ engaging



Communication

Exposure to JCDecaux touchpoints had a **powerful impact on interest/ engagement and brand trust metrics** in the communications category



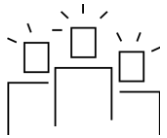
+63%

Is interesting/ engaging



Food and Drink

JCDecaux touchpoints
**increase advocacy and
drive word-of-mouth** in
the food and drink category



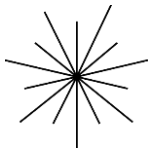
+43%

Brand I want to tell
others about



Entertainment

The superior stature, location and positioning of JCDecaux touchpoints maximises awareness to **drive interest/engagement and advocacy** in the entertainment category



+44%

Is interesting/ engaging



A young man and woman are sitting at an outdoor cafe table. The woman is on the left, wearing a light-colored sweater, and is drinking from a glass. The man is on the right, wearing a dark shirt, and is looking down at a smartphone. There are coffee cups and glasses on the table. The background shows a city street with buildings and other people.

HOW OUT OF HOME WORKS

— #2

Examining the value of JCDecaux formats when used **in partnership with other media channels**

What incremental effects to brand feeling can be created by using a combination of media formats?

JCDecaux

fiftyfive5

JCDecaux

fiftyfive5

TV and Out-of-Home is a powerful combination, delivering an **uplift across all 'feeling' metrics**

Brand consideration increases +16% when TV is combined with JCDecaux Out-of-Home.

+50%

IS INTERESTING/
ENGAGING

+14%

IS A BRAND I
TRUST

+17%

IS A BRAND I
PREFER

+16%

IS A BRAND I
WOULD CONSIDER

JCDecaux

fiftyfive5

Out-of-Home and Radio are particularly complimentary

on measures of feeling as they
appeal to different senses

Resulting in a significant increase in all 'feeling' metrics.

+43%

IS INTERESTING/
ENGAGING

+33%

IS A BRAND
I TRUST

+56%

IS A BRAND I
PREFER

+33%

IS A BRAND I
WOULD CONSIDER

JCDecaux

fiftyfive5

Brand engagement and trust is strengthened when Out-of-Home and Online run alongside each other

Bringing digital campaigns into the 'real' world has a positive impact on brand feeling. Out-of-Home is also extremely effective at driving consumers online.

+16%

IS INTERESTING/
ENGAGING

+13%

IS A BRAND
I TRUST

+4%

IS A BRAND I
PREFER

+4%

IS A BRAND I
WOULD CONSIDER

HOW OUT OF HOME WORKS

When combined with other media channels, JCDecaux touchpoints **positively impact brand feeling** for a number of reasons

#1 ALL MEDIA

Out-of-Home increases frequency of exposure, engendering interest and trust

#2 TV

Concise brand messages seen on Out-of-Home reinforces key brand beliefs communicated via TV

#3 RADIO

Using Out-of-Home with radio creates synergies when both channels are consumed together, increasing engagement and intent

#4 DIGITAL

Out-of-Home presents a brand in a real world location and encourages action



**PARTNERING WITH
JCDECAUX** DELIVERS
POWERFUL BENEFITS
FOR CLIENTS AND
ADVERTISERS



Establish **high quality reach**
and **build brand fame**



Develop an emotional connection
with audiences, **improving brand
sentiment to ultimately increase
consideration**



Provide you with research to
**substantiate and support your
conversations with clients**
regarding effectiveness



COMPLETING THE **BRAND EFFECTIVENESS TRIANGLE**

ONE
Heuristics

TWO
Consistent
memory structures

We would love to share our insights on the most effective Out-of-Home creative opportunities with your clients and creative agency partners.



WHAT'S NEXT FOR JCDECAUX INTELLIGENCE?

Dedicated budget for research in H2 2020.
What are the industry's questions into how Out of Home works?

Let them **eat cake!**

Help JCDecaux be the most effective partner.

JCDecaux **CONSULT**

\$500 Travel Prize.

Or one of **three Caker cakes**
for agencies with the highest
completion rate.

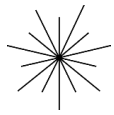


JCD DeccaLux

Thank you

Category
Automotive

Exposure to any JCDecaux touchpoints was shown to **positively impact all brand feeling measures in the automotive category**



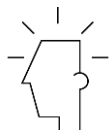
+54%
Is interesting/
engaging



+46%
Is a brand
I trust



+308%
My preferred
brand

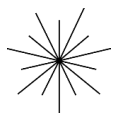


+128
Consideration



Category
Finance

Exposure to any JCDecaux touchpoints was shown to **positively impact all brand feeling measures in the finance category**



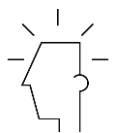
+110%
Is interesting/
engaging



+45%
Is a brand
I trust



+82%
My preferred
brand

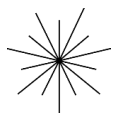


+55
Consideration



Category
Communication

Exposure to any JCDecaux touchpoints was shown to **positively impact all brand feeling measures in the communications category**



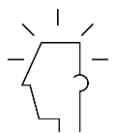
+63%
Is interesting/
engaging



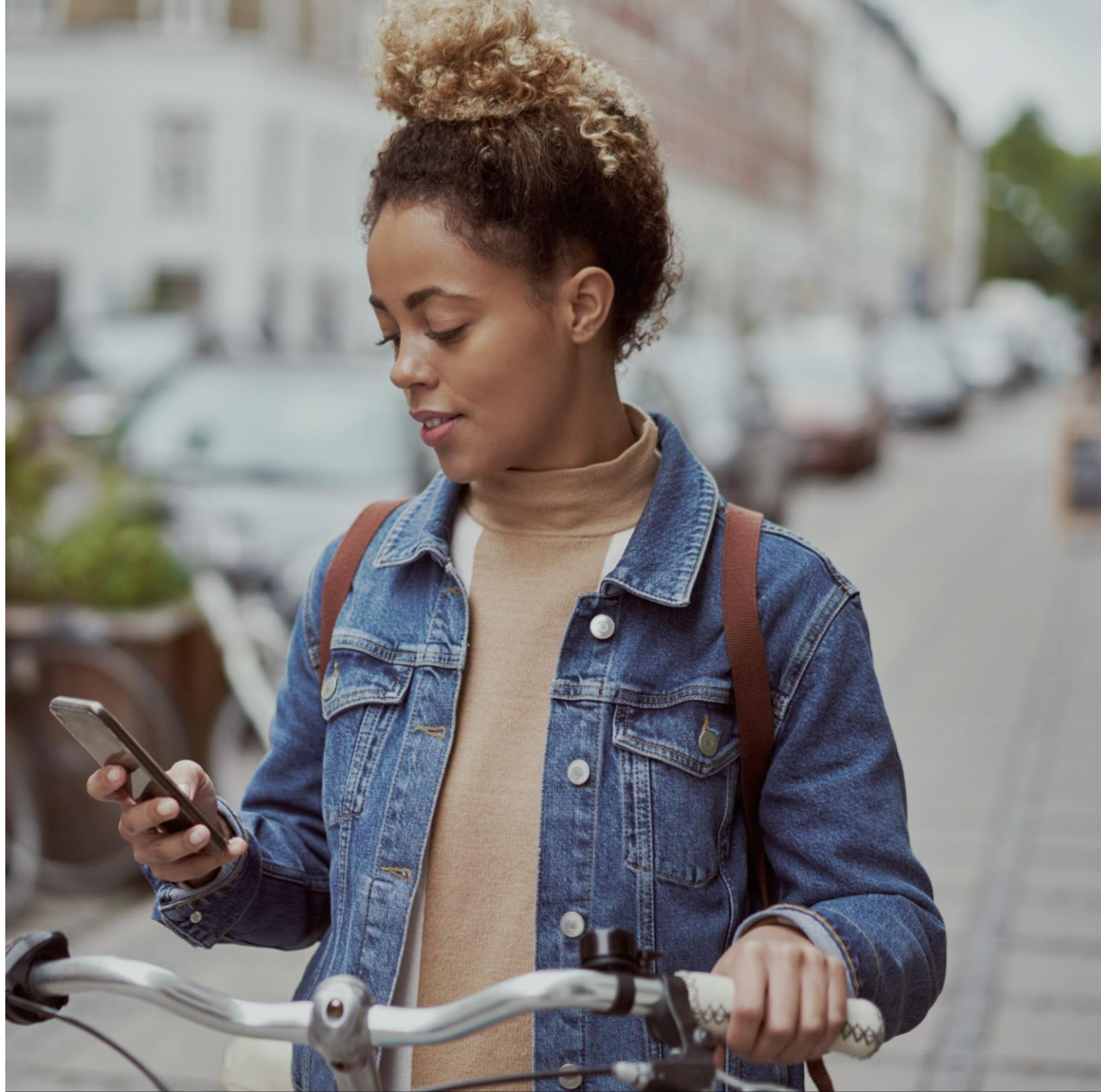
+52%
Is a brand
I trust



+21%
My preferred
brand

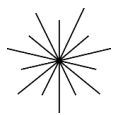


+20
Consideration



Category
Food and drink

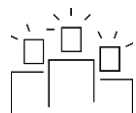
In the food and drink category, exposure to JCDecaux touchpoints drives **recommendation and campaign scale**



+17%
Is interesting/
engaging



+59%
Seeing and
hearing more
about



+43%
Brand I want to
tell others about

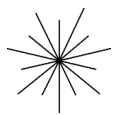


+10
Consideration

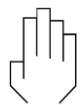


Category
Entertainment

Exposure to any JCDecaux touchpoints was shown to **positively impact all brand feeling measures in the entertainment category**



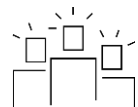
+44%
Is interesting/
engaging



+28%
Is a brand I trust



+9%
My preferred
brand



+43%
Channel I want to
tell others about

