

A close-up, low-angle shot of a woman with short dark hair, smiling gently. She is in the driver's seat of a car at night. The background is dark with out-of-focus lights (bokeh) in warm tones, suggesting city lights or streetlights. The text "MEANINGFUL CONNECTIONS" is overlaid in white, with "CONNECTIONS" in a bold font.

MEANINGFUL **CONNECTIONS**



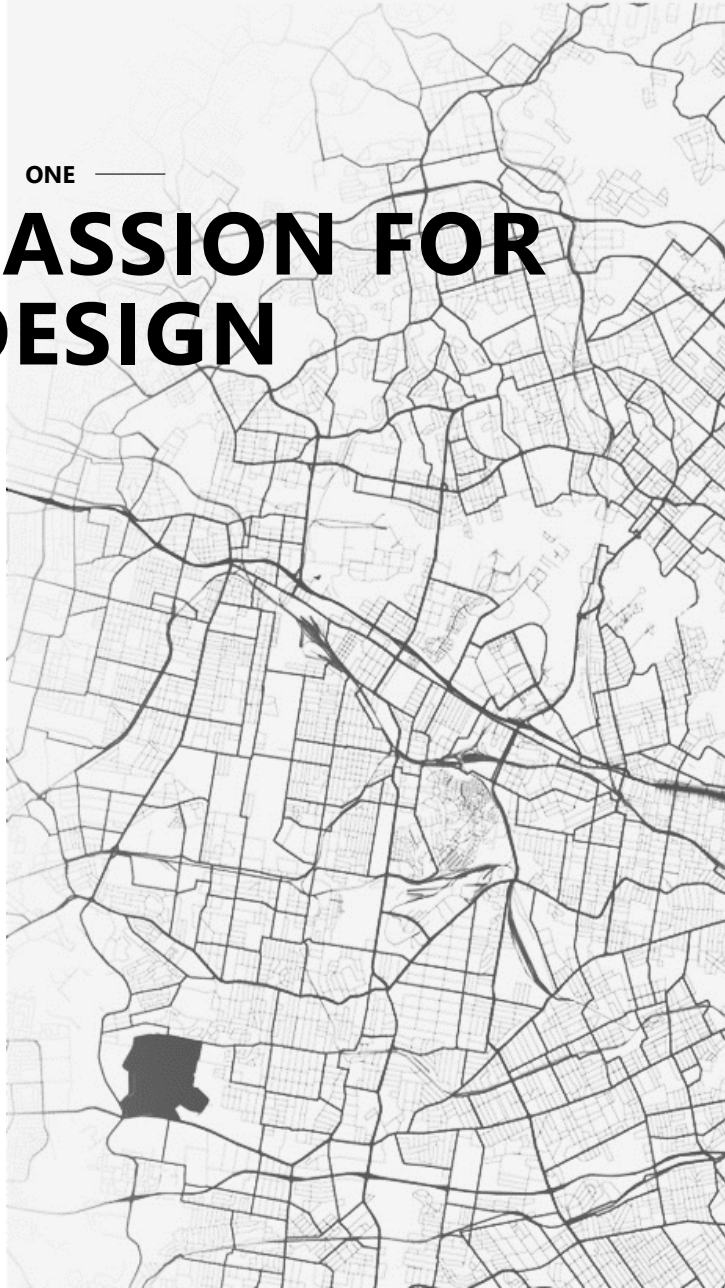
WITH AN APPRECIATION FOR
QUALITY, LOCATION AND DATA

A close-up, profile shot of a woman with dark hair pulled back, looking thoughtfully to the right. She is wearing a dark jacket and a small, sparkling earring. The background is dark and out of focus, with a white curved surface and a yellow circular light source visible on the right side. The overall mood is contemplative and professional.

WE STRIVE TO **TRULY UNDERSTAND**
OUR AUDIENCES AND CONNECT IN
MEANINGFUL WAYS

ONE

PASSION FOR DESIGN



TWO

LEVERAGING INTELLIGENCE



THREE

INCREDIBLY HUMAN



INTELLIGENCE BY DESIGN



ONE

PASSION FOR DESIGN



JCDecaux



**OUR METICULOUS
NETWORK DESIGN
MAXIMISES VIEWABILITY
FOR BRANDS**



TO DELIVER
**MEANINGFUL
CONNECTIONS**



01

Proximity to **Traffic Lights**

Higher viewability due to increased dwell time



02

Panel **Orientation**

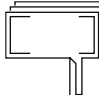
In-front and overhead sites are in the line of vision and command greater attention



03

Entire ad is viewable

Billboards are positioned to capture the attention of both drivers and pedestrians



JCDecaux offers brands unrivalled impact through a national, scalable roadside billboard network

500+

LARGE FORMAT
BILLBOARDS
NATIONALLY

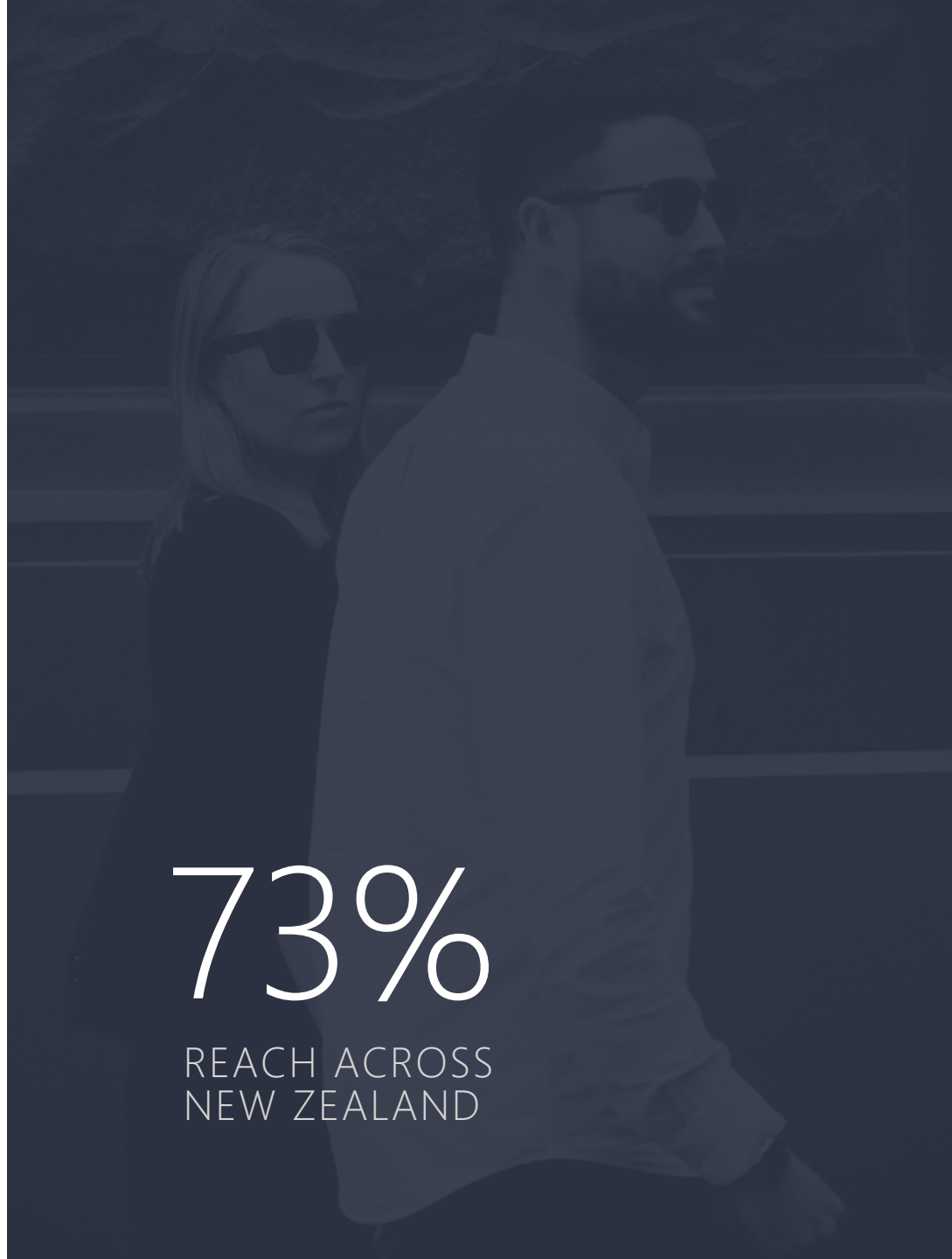


A NATIONAL
NETWORK DESIGNED
FOR MAXIMUM **HIGH
QUALITY REACH**



73%

REACH ACROSS
NEW ZEALAND



JCDecaux

MEANINGFUL CONNECTIONS

JCDecaux

WE HAVE LONG HELD THE BELIEF THAT
OUR **LARGE FORMAT BILLBOARDS**
ARE MORE EFFECTIVE THAN MOST



DOES **ASSET POSITIONING** PLAY A ROLE IN MAKING MORE **MEANINGFUL CONNECTIONS**?

Does location quality matter?

Do JCDecaux large format billboards deliver greater benefits to advertisers?

TWO

LEVERAGING INTELLIGENCE





ACCESSHQ Eye Tracking

AccessHQ's eye tracking provides the ability to record and evaluate consumer behaviour in a real-life context. It is a powerful tool for exploring how people respond to, and interact with, outdoor advertising and its influence in the buyer decision-making process.



33.4%

New Zealand
Population

38%

National
GDP

Why Auckland?

New Zealand's economic powerhouse,
an innovative, globally connected city



SAMPLE POPULATION

15%

46+

22%

18-25

30%

36-45

33%

26-35



Female



Male



HIGH TRAFFIC ROUTES

Participants were driven around one of **two set routes in Auckland for 60-75 minutes**

BALANCED EXPOSURE

Routes selected included both **JCDecaux and competitor sites**

DIVERSE PRECINCTS

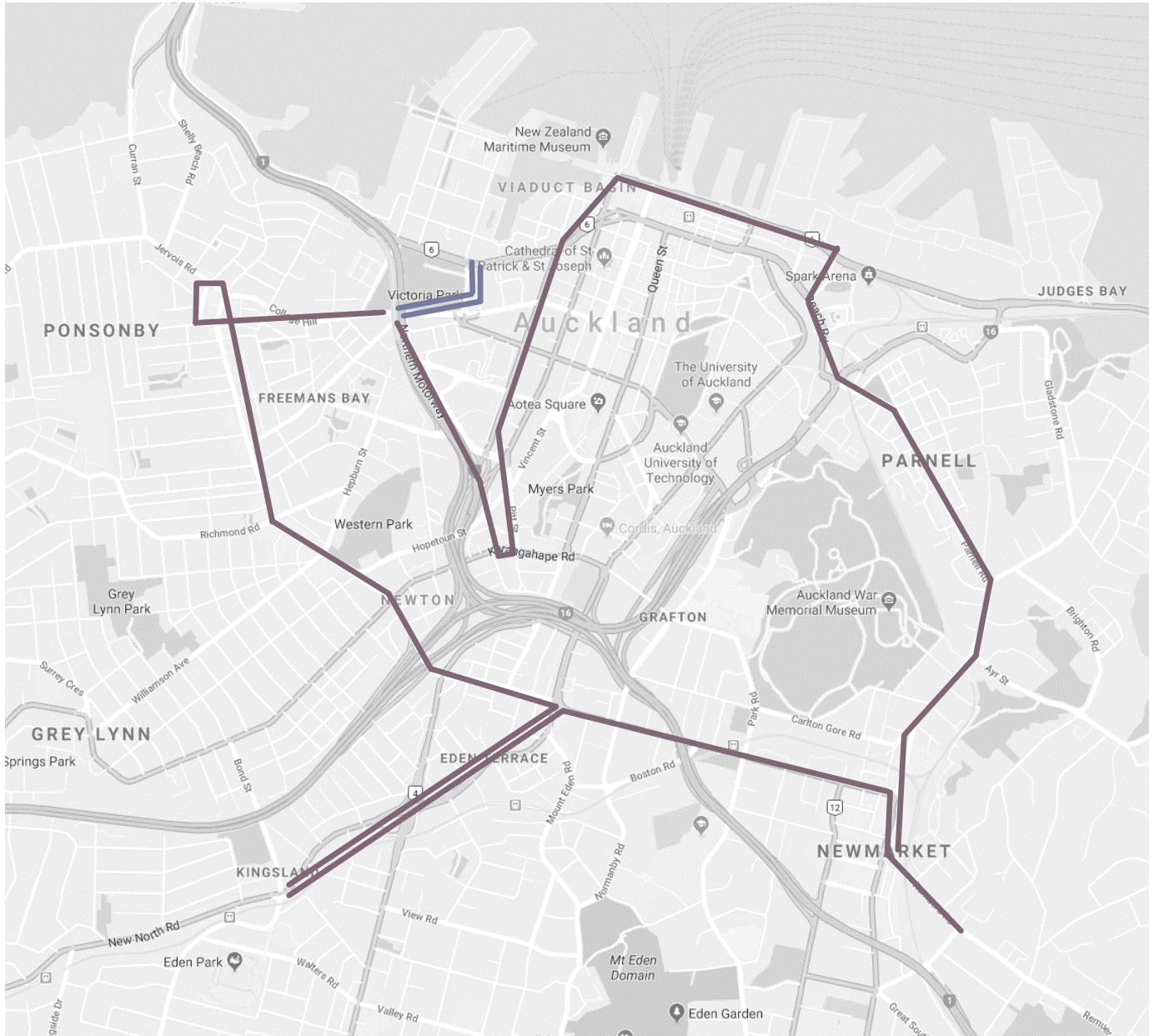
Routes were designed to cover **a variety of environments** including motorway, suburban, airport, CBD and entertainment and industrial precincts



28 PARTICIPANTS

1,256 OPPORTUNITIES
TO SEE (OTS)

683 JCDECAUX OTS
573 COMPETITOR OTS



— Driving — Walking

CITY PRECINCTS

This route took participants through Newmarket, up Khyber Pass, to Kingsland and Ponsonby before switching mode to walk by Victoria Park. They then drove through the CBD, Parnell and back to Newmarket

JCDECAUX SITES

35

OPPORTUNITIES TO SEE

385

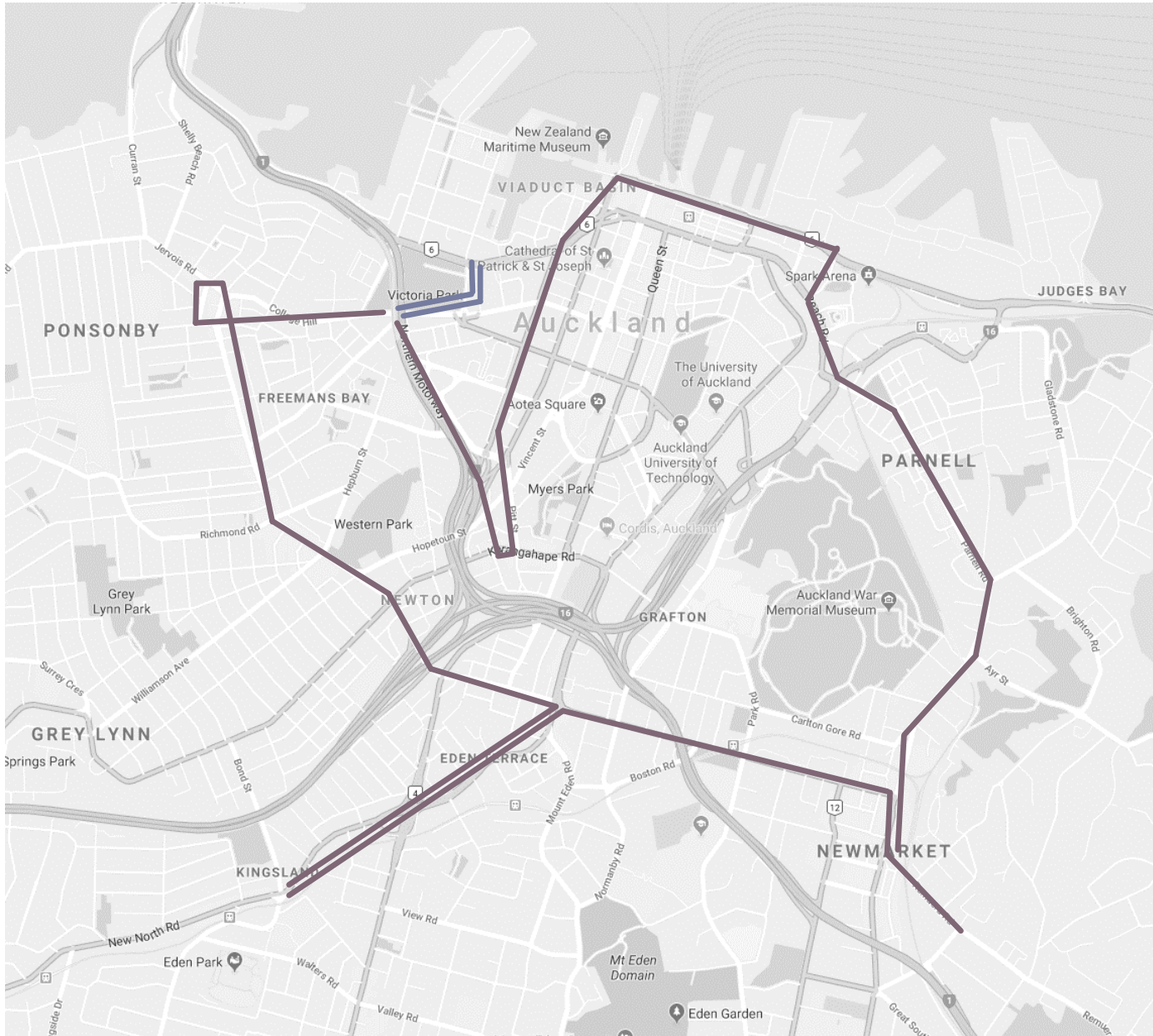
COMPETITOR SITES*

28

OPPORTUNITIES TO SEE

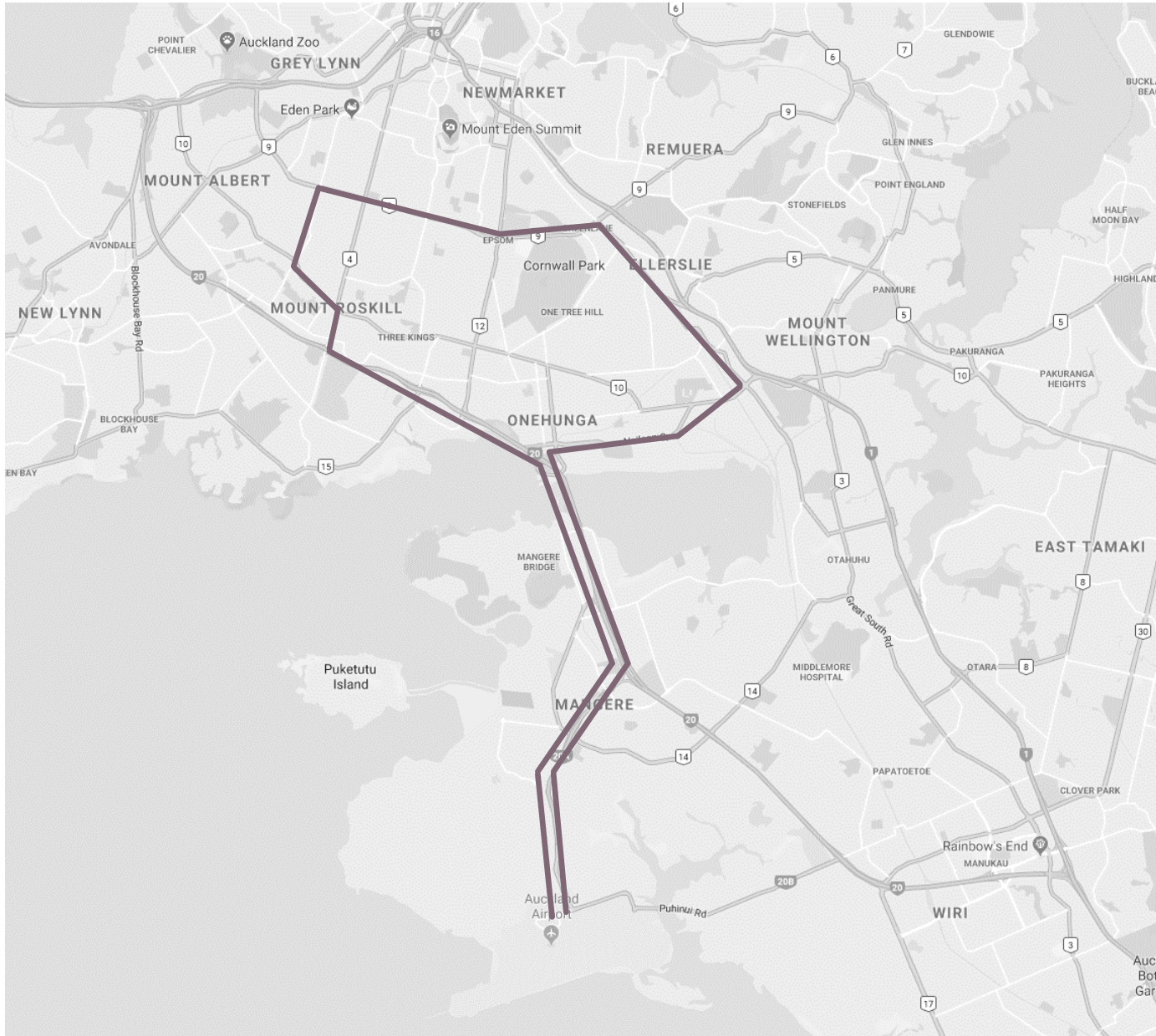
348

* Large format sites and selected street furniture



— Driving — Walking





— Driving — Walking

AIRPORT AND SURROUNDINGS PRECINCTS

This route took participants through the Airport precinct, along the North Western motorway into the Onehunga industrial zone, via suburbs including Epsom and Sandringham and back to the Airport

JCDECAUX SITES

43

OPPORTUNITIES TO SEE

298

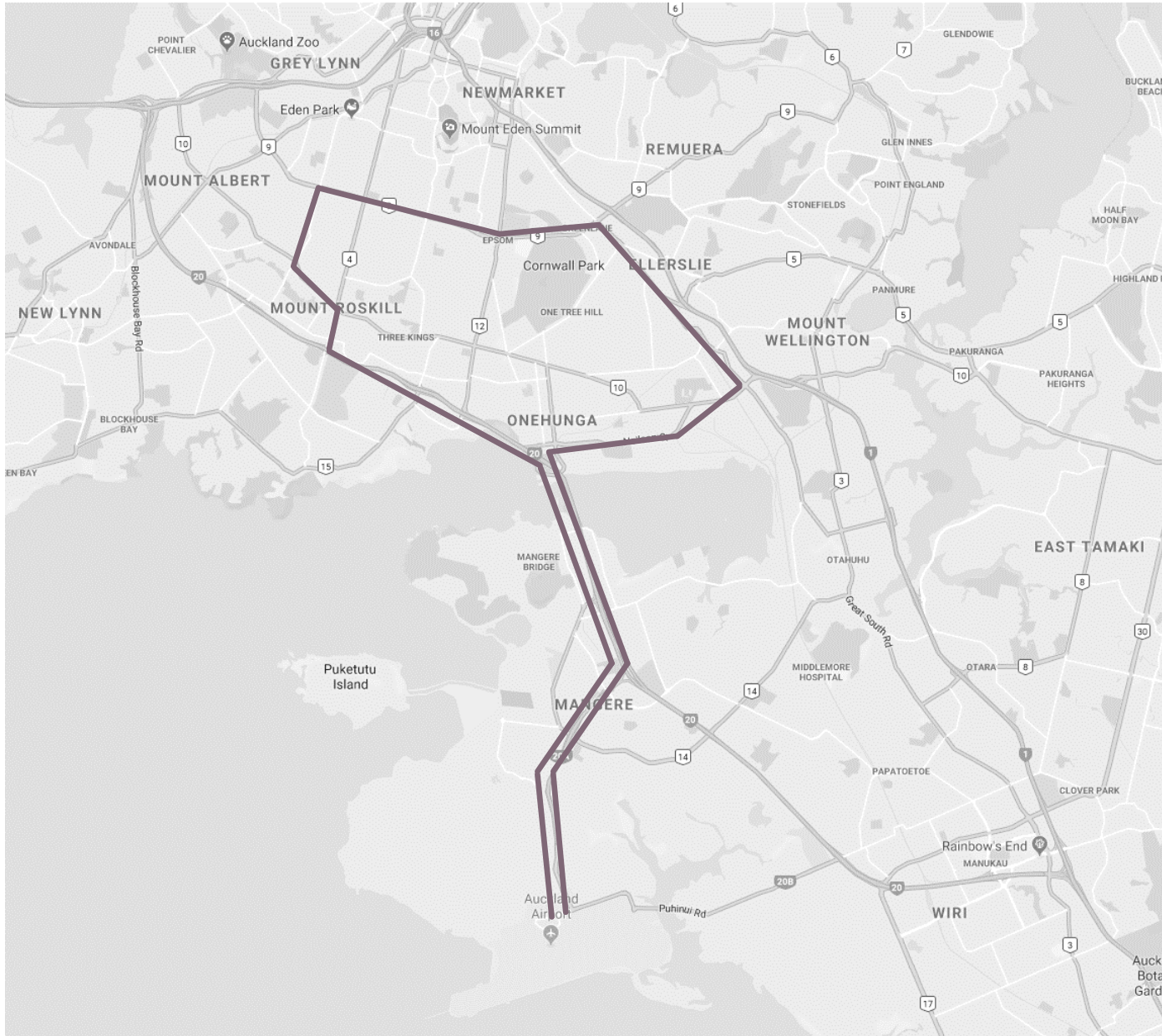
COMPETITOR SITES*

12

OPPORTUNITIES TO SEE

225

* Large format sites and selected street furniture



— Driving — Walking





THE MAIN METRIC
MEASURED IN THIS STUDY
WAS **ATTENTION [%]**

$$\text{Engagements} \div \text{OTS}$$

The number of sites looked
at for 200 milliseconds or
more, one or more times

The maximum
number of sites that
could be engaged
with along the
participant's path

$$= \text{Attention [%]}$$



Why **200 milliseconds** is considered an 'engagement'

THE TWO TYPES OF VISUAL PROCESSES

Access Testing recognises two types of visual processes: Reading and Recognition of Visuals (i.e. logo or photograph)

READING

Involves a series of rapid movements called saccades. Between the saccades the eyes remain stationary for 200ms to 250ms during which information is extracted. These stationary stages are called fixations.

PICTURE RECOGNITION

Fixation durations on photographs are in the range of 250ms to 300ms.

200MS AS AN ENGAGEMENT

Access Testing considers 200ms to be the minimum length of time for a viewer to gain meaning from visuals and/ or extract some information from reading



THE SECONDARY
METRIC MEASURED
WAS **BRAND RECALL**

A post-exposure questionnaire measured unprompted and prompted recall of advertising creative, across JCDecaux sites

THREE

INCREDIBLY HUMAN





1,750
VIEWS
ANALYSED

01

Time

Measurement of impact.
Average length of viewing
engagement and number
of exposures

02

Attention

Measurement of
meaningful impressions
that pave the way to
being remembered

03

Recall

Measurement of brand
recognition and
memory encoding



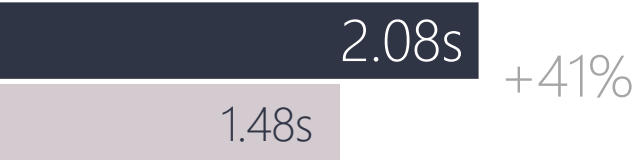
01

TIME

Measurement of impact.
Average length of viewing
engagement and number
of exposures

JCDECAUX SITES COMMAND LONGER **VIEWING TIME**

Total Large Format



Digital Large Format



■ JCDecaux ■ Competitors





JCDecaux

MEANINGFUL
CONNECTIONS

JCDecaux

TRAFFIC LIGHT PLACEMENT

44%

OF JCDECAUX SITES
TESTED WERE
STRATEGICALLY
POSITIONED AT
TRAFFIC LIGHTS



LOOK FOR LONGER

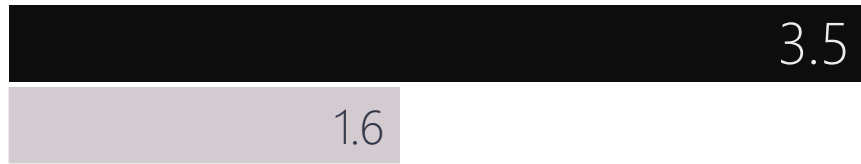
JCDecaux sites at traffic light intersections achieved an overall average length of viewing engagement of **3.88 seconds**, a further uplift of **87%***

* 87% uplift vs. total JCDecaux overall average engagement length (2.08s)

Total Large Format



Digital Large Format



Number of views: ■ JCDecaux ■ Competitors

DOUBLE-TAKE MOMENTS

The movement and placement of JCDecaux Digital Large Format sites commanded the highest number of views





The results proved the superior digital network quality and overall placement of JCDecaux sites command greater viewing impact

STRATEGIC
PLACEMENT

+

NETWORK
QUALITY

GREATER
IMPACT



02

ATTENTION

Creating impressions that
pave the way to being
remembered



JCDecaux

**MEANINGFUL
CONNECTIONS**

JCDecaux

ENGAGEMENT

The number of sites viewed for 200 milliseconds or more, one or more times

OTS

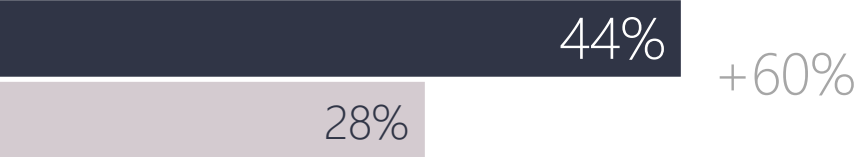
The maximum number of sites that could be engaged with along the participant's path

ATTENTION

%

CONSISTENTLY JCDECAUX SITES DELIVERED GREATER **ATTENTION**

Total Large Format

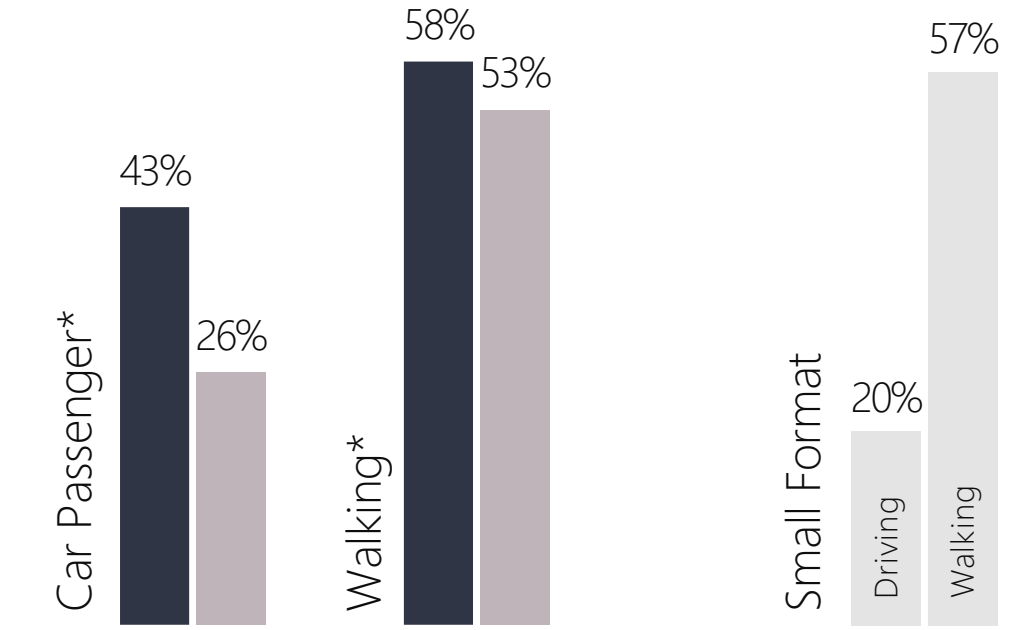
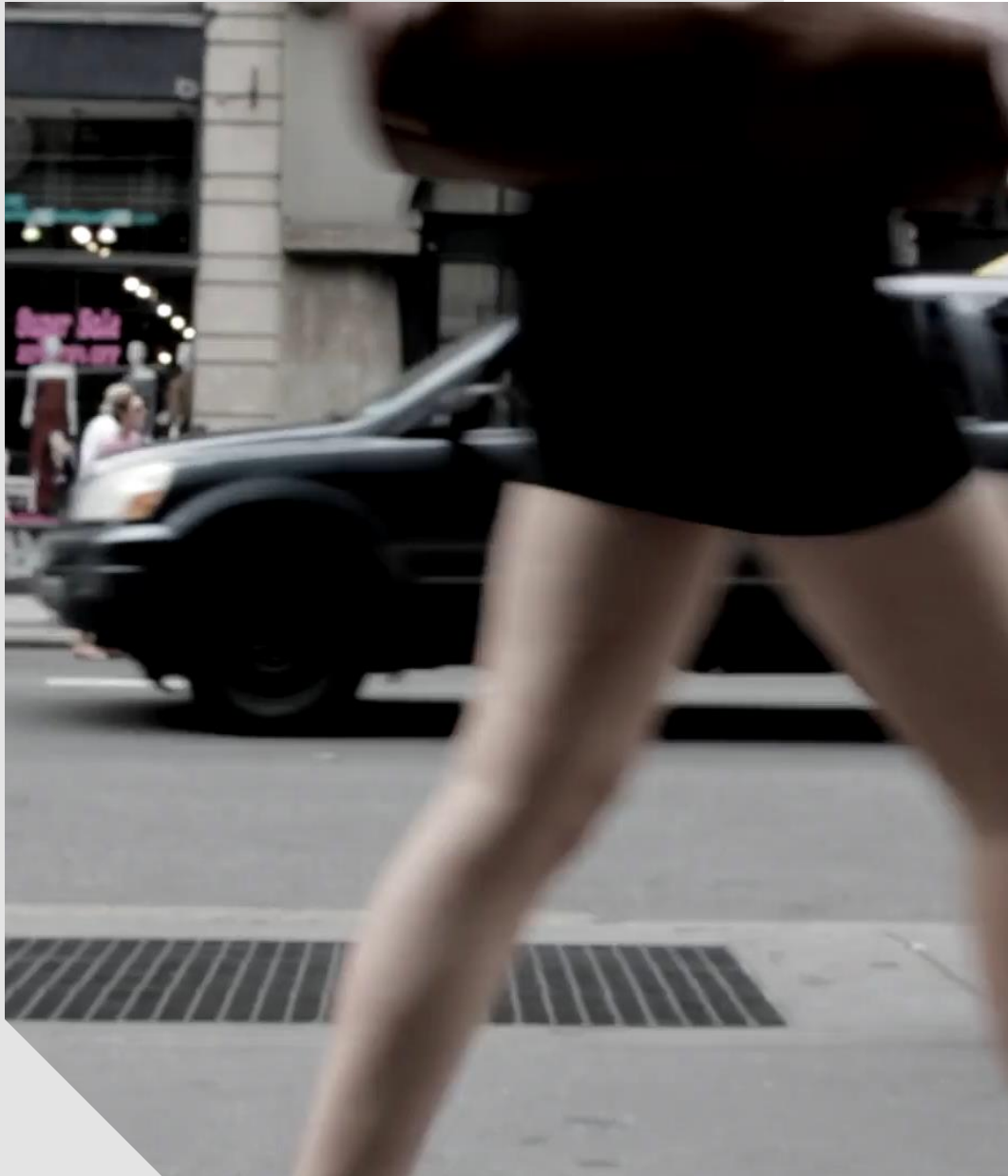


Digital Large Format



■ JCDecaux ■ Competitors

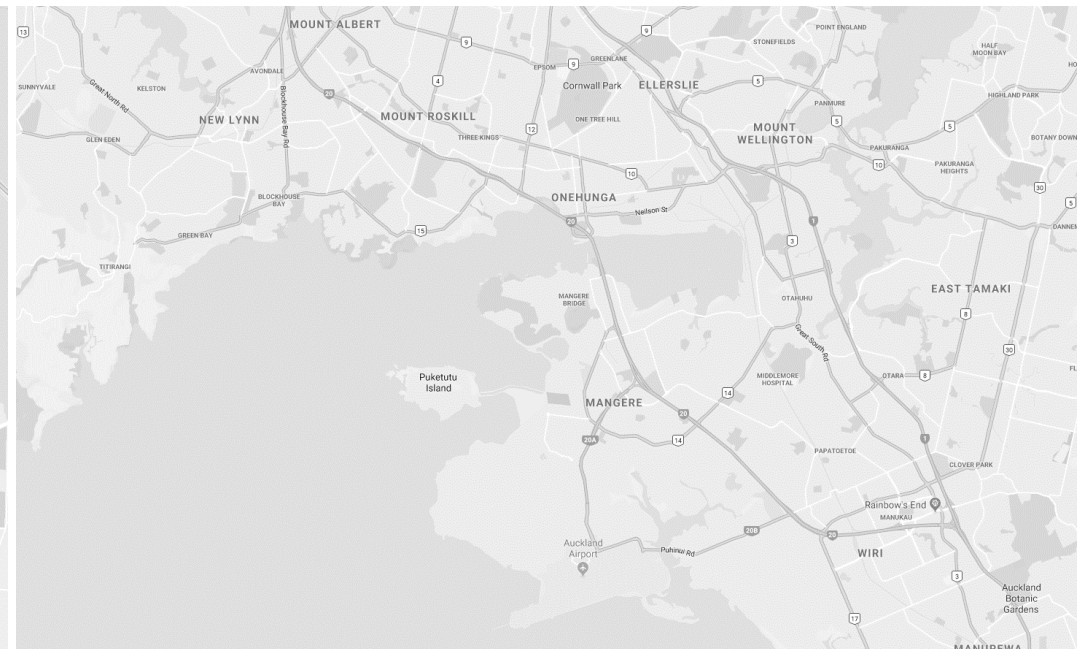
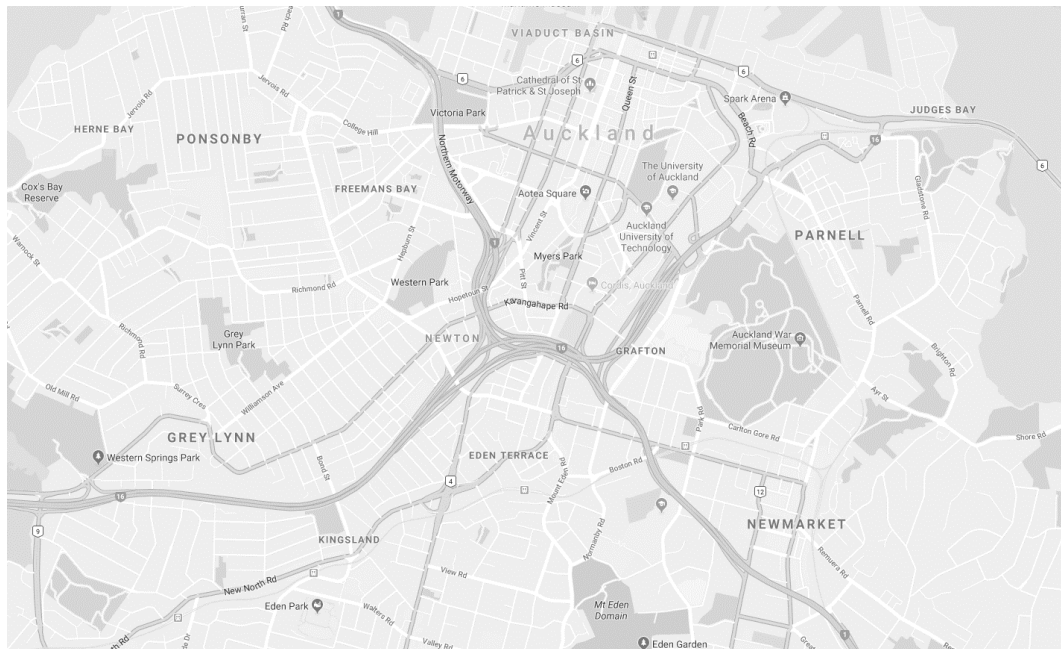




* TOTAL FOR ALL FORMATS TESTED

Higher attention levels were demonstrated among **pedestrians** and **car passengers**

■ JCDecaux ■ Competitor

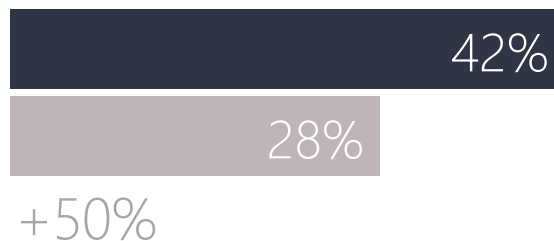


GREATER ATTENTION

ACROSS BOTH THE CITY AND AIRPORT AND SURROUNDING ROUTE PRECINCTS

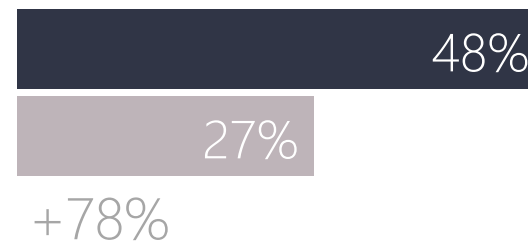
01 —

CITY
ROUTE PRECINCTS



02 —

AIRPORT AND SURROUNDING
ROUTE PRECINCTS



■ JCDecaux ■ Competitor

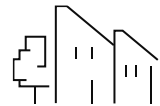
IN FACT, JCDECAUX SITES COMMANDED GREATER ATTENTION **ACROSS ALL** **PRECINCTS** TESTED



Motorway

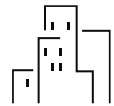
+42%

JCDECAUX
 HIGHER THAN
 COMPETITORS



Suburban

+61%



CBD

+47%



Entertainment

+29%



Industrial

+50%



Airport

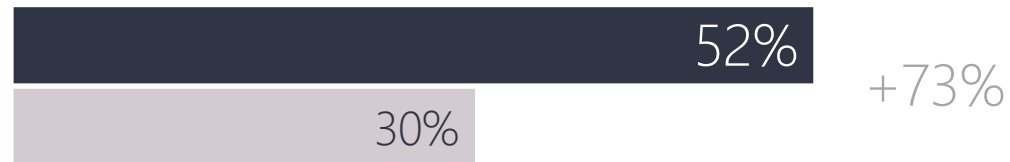
100%

JCDECAUX
 DOMINANCE
 (NO
 COMPETITORS)

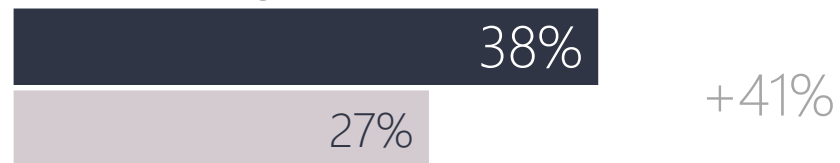
STRATEGIC PLACEMENT

Across the board, JCDecaux sites command greater attention proving the 'quality effect' of our asset placement, this uplift is particularly evident at traffic light locations

Traffic Light Locations



Non Traffic Light Locations



Attention

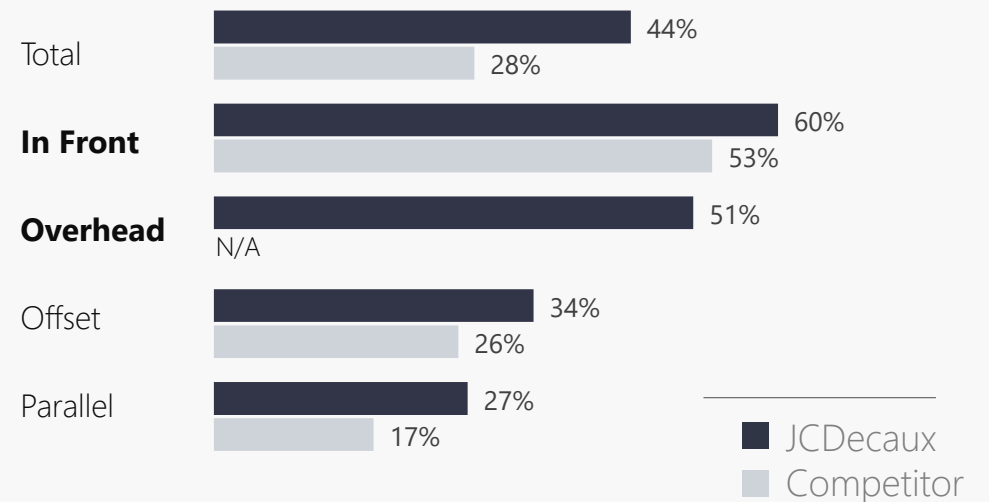
■ JCDecaux ■ Competitors





PANEL ORIENTATION PLAYS A BIG ROLE IN ATTENTION

The uplift achieved from overhead and in-front orientation supports the JCDecaux philosophy and ongoing strategy for digitisation and quality site selection





The results proved that superior network quality and placement of JCDecaux sites command greater attention across all precincts tested. The strength of JCDecaux was demonstrated across both pedestrians and car passengers.

STRATEGIC
PLACEMENT

+

NETWORK
QUALITY

GREATER
ATTENTION



RECALL

Measurement of brand recognition and memory encoding



THE ROLE OF MANY
OUT-OF-HOME CAMPAIGNS IS
TO **DRIVE BRAND** AND
PRODUCT AWARENESS

FOR THIS REASON THE STUDY WAS
DESIGNED TO MEASURE JCDECAUX'S
ABILITY TO MAKE **CAMPAIGNS**
EFFECTIVE AND MEMORABLE



Heightened impact and
greater attention drives
stronger campaign recall

— 01

ATTENTION

For information to be encoded, **attention is required**

— 02

MEMORY ENCODING

The process of storing information in memory

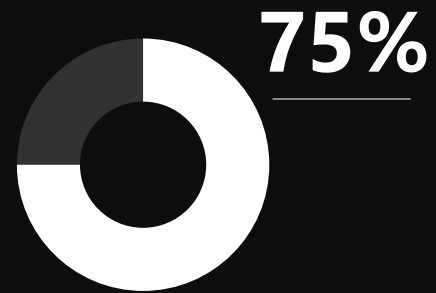
— 03

TOP OF MIND RECALL

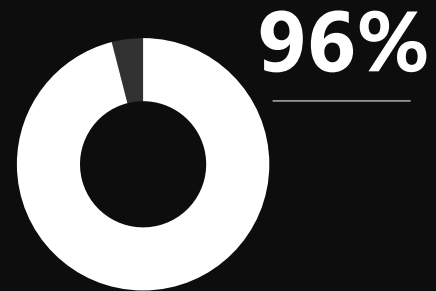
The process of outputting information from memory



IMMEDIATELY
FOLLOWING THE
EYE-TRACKING ROUTE



of respondents correctly named JCDecaux advertisers seen on route without being prompted



correctly named JCDecaux advertisers seen on route when prompted with a list of advertisers



The results showed the superior network quality and placement of JCDecaux sites resulted in strong brand recall

STRATEGIC
PLACEMENT

NETWORK
QUALITY

BRAND
RECALL

THE QUESTION
OF **SMALL**
FORMAT



STREET FURNITURE

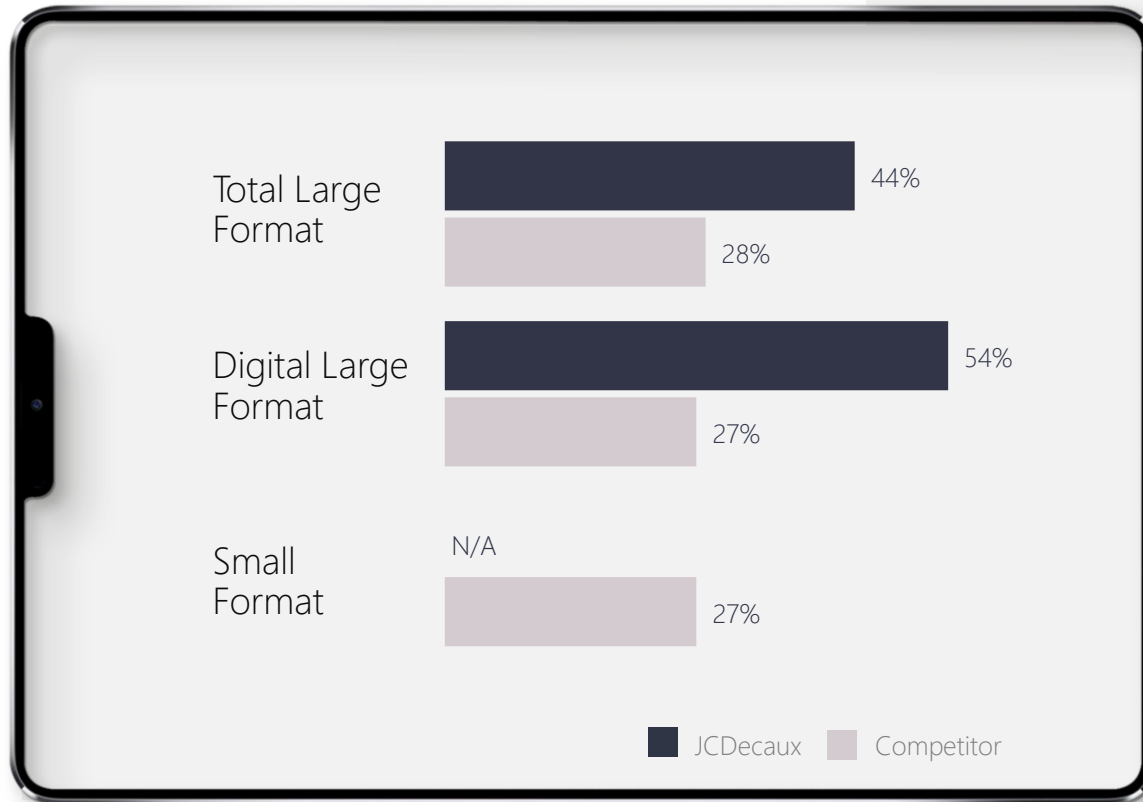
ACHIEVED ITS GREATEST
ATTENTION LEVELS AMONG
PEDESTRIAN AUDIENCES

57%

HOWEVER, THE OVERALL
ATTENTION SCORE FOR **JCDECAUX**
LARGE FORMAT WAS IN FACT
GREATER AMONG PEDESTRIANS
THAN OF STREET FURNITURE

58%

JCDecaux Digital Large Format was **twice as effective** as Small Format in overall attention score



ATTENTION SCORE
ACHIEVED

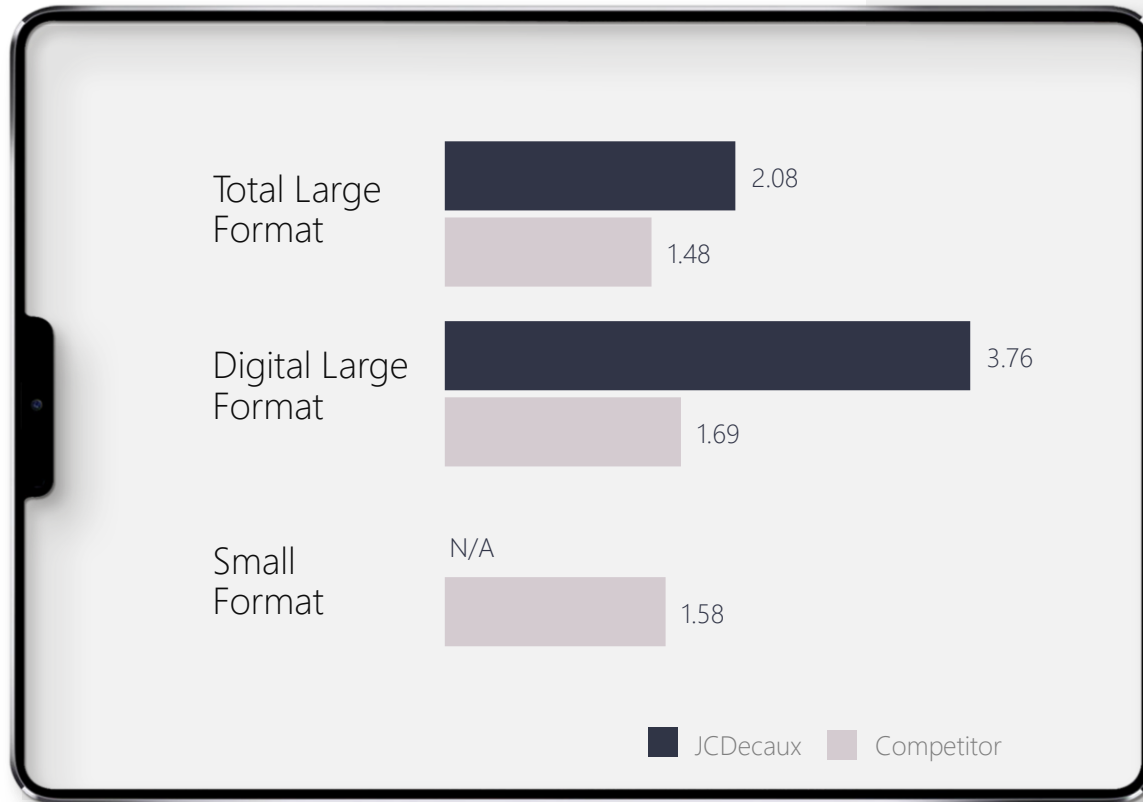
SMALL FORMAT

27%

JCDECAUX DIGITAL
LARGE FORMAT

54%

JCDecaux Digital Large Format
held attention for over two
times as long as Street
Furniture **+138%**



THE AVERAGE TIME
SPENT VIEWING

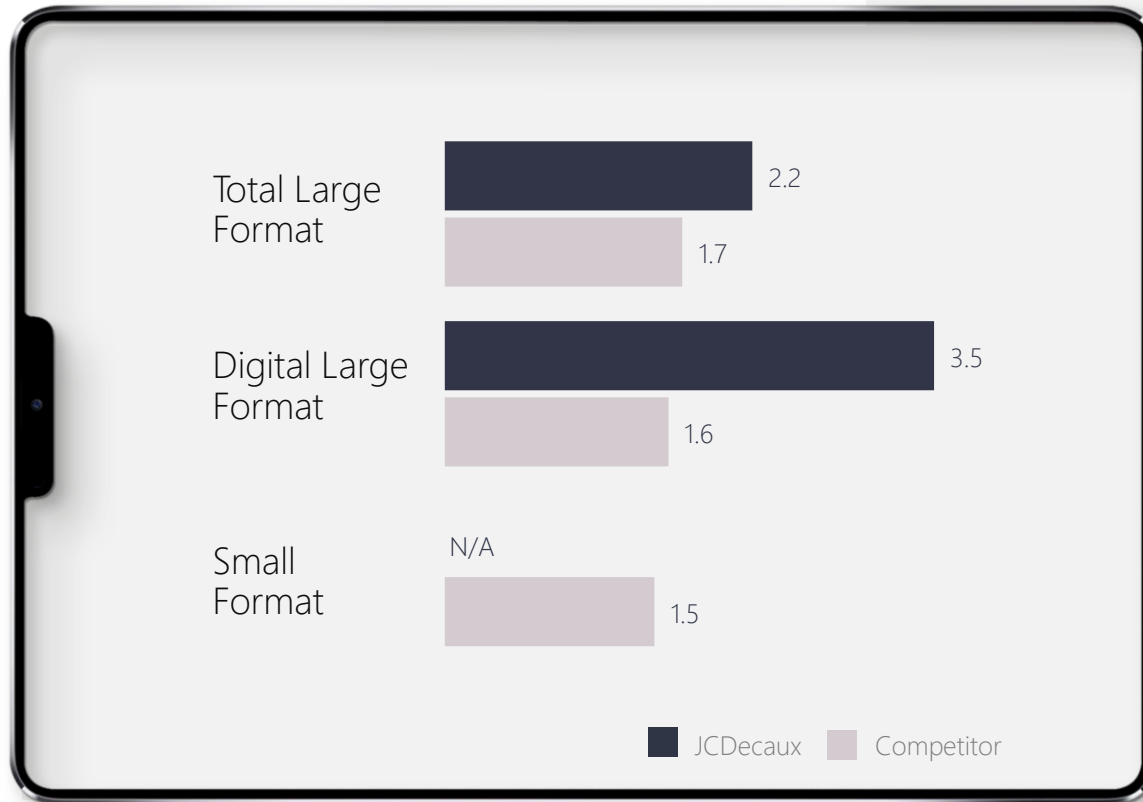
SMALL FORMAT

1.58s

JCDECAUX DIGITAL
LARGE FORMAT

3.76s

JCDecaux Digital Large Format
commanded a significantly
higher number of views
than Small Format



COMMANDING
NUMBER OF VIEWS

SMALL FORMAT

1.5

JCDECAUX DIGITAL
LARGE FORMAT

3.5

A man in a dark suit and sunglasses is shown in profile, looking down at a smartphone in his hand. He is standing in a modern office environment. In the background, two women are walking past him. One woman has short blonde hair and is wearing a dark sleeveless top, while the other has long brown hair and is wearing a light-colored shirt and a dark bag. The word "ROLEX" is visible on a wall in the background.

WHY CHOOSE
JCDECAUX ?



JCDecaux

MEANINGFUL CONNECTIONS



MEANINGFUL CONNECTIONS

**Attention
Grabbing**

+60%

DELIVERING
HEIGHTENED
ATTENTION

**Looking for
Longer**

+35%

ACHIEVING
LONGER
VIEWING
LENGTH

**Inspiring
Engagement**

+38%

MORE VIEWS
ON AVERAGE

**More
Memorable**

75%

STRONG BRAND
RECALL,
UNPROMPTED

**More
Impactful**

+65%

GREATER
OVERALL
IMPACT THAN
STREET
FURNITURE

The logo for JCDecaux, featuring the company name in a bold, white, sans-serif font. The text is enclosed within a white L-shaped frame that consists of a horizontal line at the top and a vertical line on the left side, forming an open corner on the right and bottom.

JCDecaux

THANK-YOU

