

## Sign the times

Industry consolidation and an increase in accountability sees outdoor continuing to increase its slice of the media pie.

While it's true that the outdoor advertising market has only a small share of adspend in New Zealand, the market continues to experience consistent growth.

The most recent figures from the ASA show an increase from 2.2% to 2.4% between 2001 and 2002, representing a 164% growth in billings over the past five years. Total category revenue in 2002 was \$37m compared to \$14m in 1998. (Source: the ASA's NZ Advertising Industry Turnover Report.)

Charles Parry-Okeden, director of sales at Buspak Advertising, believes the growth spurt isn't over yet and predicts outdoor will achieve 3% of NZ's total advertising spend by 2004.

So what's driving the growth? Two significant contributing factors in the past 12 months both centre around very aggressive competitive activity by APN News & Media, which either owns outright, or has a significant share in Adshel, Buspak and Look Outdoor. Late last year Look and Adshel were brought under the same 'New Zealand Outdoor' banner, headed up by former Adshel boss Stuart Moffatt. This move means the ease of buying the two different media (billboards and street furniture) has been much enhanced for agencies wanting a complete outdoor option, says Moffatt.

"There's no question that they are strategically different products," he says. "Billboards are used more for impact in strategic locations, and street furniture more for frequency. Collectively they provide tremendous reach, and a complete solution for an outdoor scenario is now easier to achieve."

Adshel's panel expansion has also continued at pace. "Our build programme is focused in particular on the North Shore and other parts of Auckland and Wellington." In Wellington Adshel has developed a new 'pedestrian shelter', driven by a request from the Wellington City Council.

"The council had a requirement to provide windbreaks to protect people on a number of street corners. So we designed and manufactured a pedestrian shelter to offer windbreaks and rain protection on exposed corners." Ultimately, Moffatt says Adshel plans to have 40 pedestrian shelters within a 5km radius of Wellington's central business district. New Adshel street furniture (all carry the international standard 1.8m x 1.2m panel) under construction in Auckland includes seats, bins and bike racks in and around the Britomart development, as well as 15 retail kiosks. Moffatt says Adshel now has 2400 panels in NZ, heading for a national total of 3500.

Also offering an enhanced product range is Buspak. In January, Buspak divided its products into three identity zones — Impact, Frequency and Captive (see pictures). "Each zone describes the manner in which the various products within it communicate a client's message to their audience," says Buspak's Parry-Okeden.

"A benefit our advertisers are recognising is the ability to strategically integrate products from the different zones within one campaign. This multi-zone strategy provides advertisers with multiple communication platforms, incremental reach and frequency as well as a more dynamic campaign with a creative point of difference."

Buspak has launched three new products (Zeus, Uptowner & Maxibus) in the past 12 months and Parry-Okeden says the investment in product development is paying dividends in terms of new converts to Buspak. "We've experienced a combination of clients within certain categories steadily increasing their commitment to transit," he says, "as well as attracting new advertisers to the

medium." He says new advertisers to transit over the past 12 months include Foodstuffs, Pak'n Save, Ford, Toyota, NZ Lotteries Commission, Carter Holt Harvey, ASB Bank, HSBC, Fisher & Paykel, Mainland, TelstraClear and the Sunday Star-Times.

But outdoor isn't only being driven by Buspak and Adshel. The recent relaunch of the Outdoor Advertising Association of New Zealand (OAANZ) has seen 95% of the outdoor industry (in terms of volume) signing up to provide ACNielsen with a declaration of their revenue every month, according to OAANZ chairman Duncan Harris, and these numbers are now included in Nielsen's Advertising Information Service (AIS).

Harris says it's just one of the ways the outdoor industry as a whole is distancing itself from the cowboy days of yesteryear. "We're in the process of getting an agreement signed between the advertising agencies and OAANZ," he says, "that's a standard set of terms and conditions that outline the deadlines and processes of booking outdoor. As an association we're declaring that the member operators will work within this framework of rules and regulations."

Moffatt says the re-energising of OAANZ has been welcomed by the industry. "It's important as an industry that we remain on the map," he says. "One way to do that is in providing that service to Nielsen that then gets fed out to agencies so they can actually have a look at some competitor analysis to see what things are being done in their particular field."

So what do media buyers think? Is having outdoor spend as part of the Nielsen service a big deal?

You betcha, they say — and as Moffatt suggests, for the most part their enthusiasm revolves around competitive analysis. "Outdoor was one of the biggest categories of expenditure where spends weren't available," says Clemenger BBDO's Nigel Keats, "so it's good to have it now."

FCB's Anna Chitty is equally enthusiastic. "Any data is better than nothing for monitoring purposes and it's critical in an age of media and consumer fragmentation to know as much as possible about how, and in what media, our competitors are vocal — to find opportunity and perhaps a competitive edge."

M for Media's Trudy Dickinson agrees. "It will be useful in that it will add to the total ratecard picture of an advertiser's activity and it will also give us an indication of the various suppliers based on their share of outdoor spend." She notes however that the figures will overstate the market. "Not just because it's at ratecard but because some sites are bonused for months due to low demand and the fact that the suppliers, apart from Oggi [which puts up its own imagery on unsold sites] don't like blanks."

And outdoor could do more, she says. "I'd like the industry to concentrate on getting up-to-date traffic counts using a standard form of measure and make sure their sites are kept clear of obstructions and in good repair at all times."

The process to building a legitimate industry is a always two-way street, says Moffatt; "The re-establishment of OOANZ has us moving forward," he says. "We're establishing our code of ethics and business practice as part of our membership."

"At the same time it's incumbent upon the agencies to fully support the agreement that's in place, and that means not using illegal sites and if there's poor business practice going on they must send a message to those companies that they won't deal with them."

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What exactly is 'outdoor'? OAANZ chairman Duncan Harris (from Advantage Media) is pretty sure posters aren't part of the equation. "OAANZ hasn't extended the concept of outdoor to posters," he says — before going on to make something of a Freudian slip: "We don't really see that as part of billboards, ahh ... outdoor."

At Phantom Billstickers, James Holloway says he believes OAANZ is certainly billboard-centric in its thinking, but says he's too busy putting up posters to worry about it. "There's no animosity or anything," he says. "As far as I know they haven't approached us about joining and we haven't approached them."

Holloway is convinced posters are 'outdoor', however. "When it rains we get wet, so we are outside — there's no argument about that."

Outside — and probably breaking some rules, retorts Harris. "It's my understanding that posters are illegal, but I guess every council has different rules."

Last year, Buspak conducted a number of recall, reach & frequency case studies using NFO Research. A random sample of 132 Auckland residents was recruited on the street to take part in a self-completion one-week tracking diary. Three hundred and fifty face-to-face interviews of a random sample of the population were also conducted in Auckland at a later date, to measure recall of a Pam's transit advertising campaign.

The research found that:

72% of the 132 diary trackers recorded seeing the ad over the one-week research period.

The average participant saw the ad seven times over the week.

52% of the 350 face-to-face participants could recall seeing the campaign on buses when shown a photo of it.

The campaign worked effectively among the core target groups of main grocery buyers, with a recall result of 50%, and share-shoppers with a recall result of 56%.

Buspak's Charles Parry-Okeden says the research confirms the ability of the transit medium to cost-effectively deliver extensive reach with high levels of frequency. "An impressive all-people recall score of 52% demonstrates the effectiveness of transit as a broadcast medium," he says.

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