

A woman with brown wavy hair and red lipstick is smiling and looking towards a man in a dark blue shirt. The background is slightly blurred, showing what appears to be an office or meeting room setting.

JCDecaux New Zealand

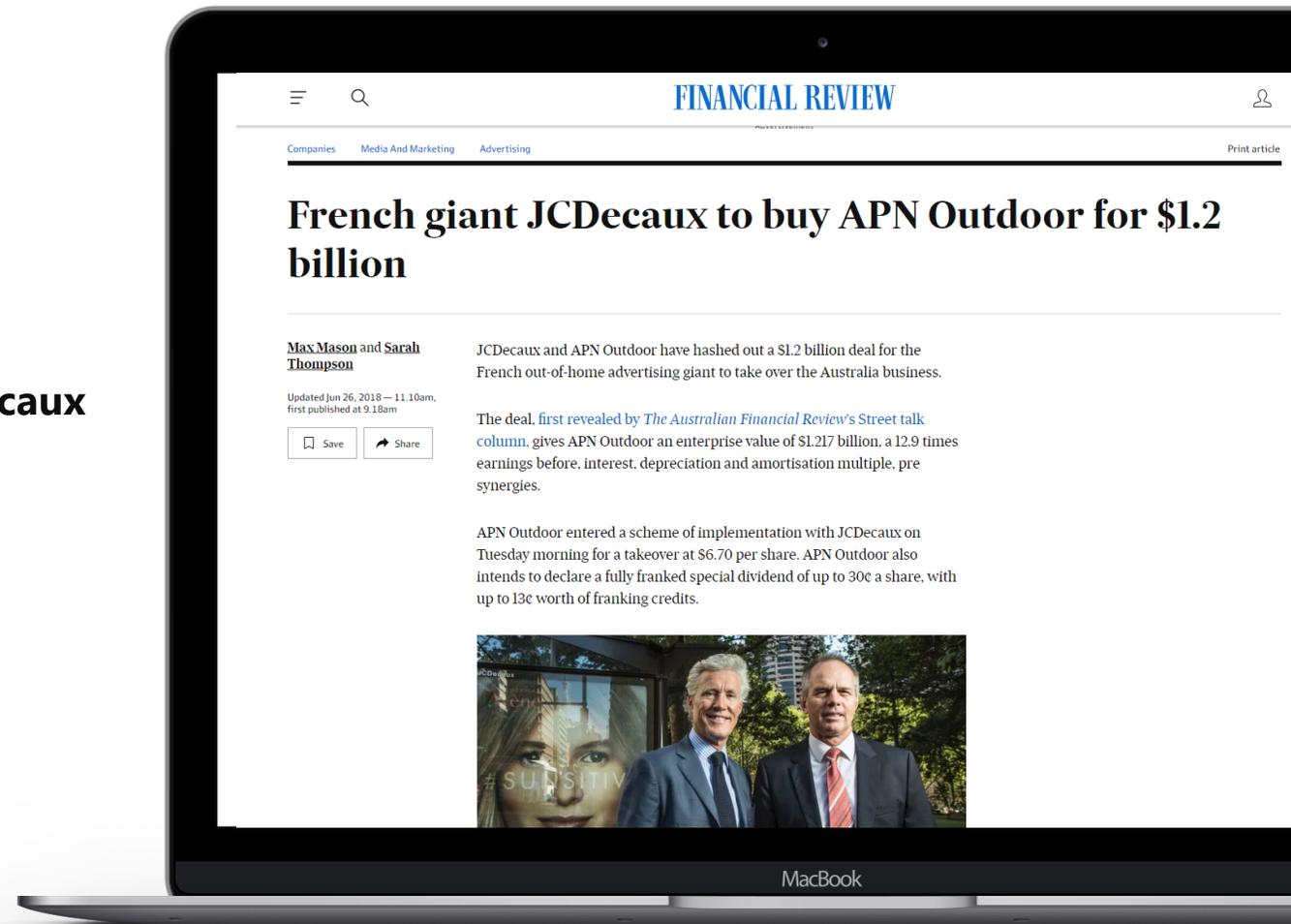
# VISION FOR BUILDING BRANDS

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

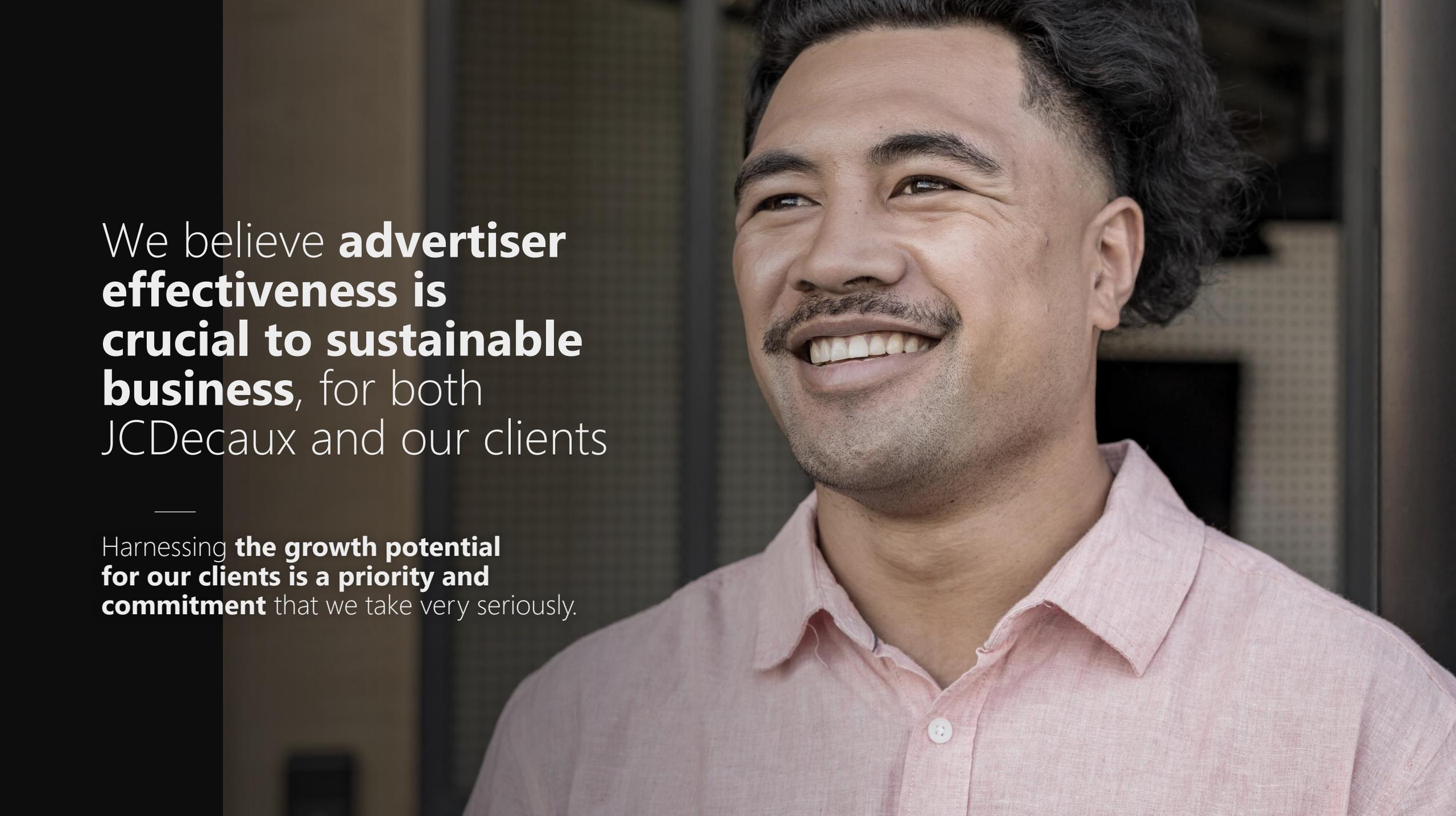
# THE ECONOMIC IMPACT OF COVID-19 HAS SEEN **MARKETING AND ADVERTISING BUDGETS PUT UNDER THE SPOTLIGHT**

// 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 dark and out of focus, suggesting an indoor setting with a window or door.

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 emanating from a central point, creating a perspective effect. The rays are thin, white lines that fan out as they move away from the center, set against a solid black background. The overall effect is that of a bright, glowing tunnel or a starburst pattern.

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

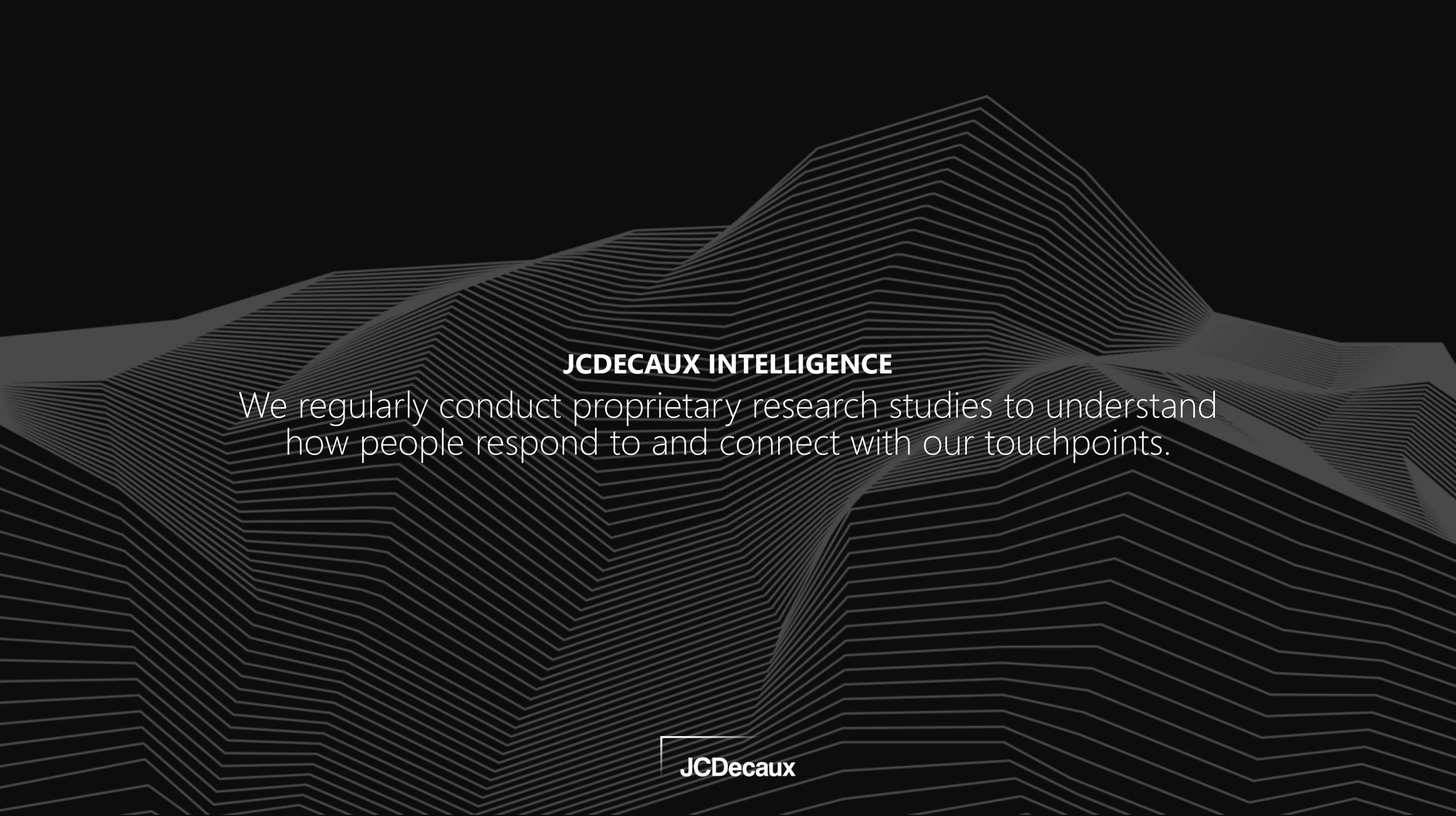
By Peter Field

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

BOSTON RD

Grafton 12 ↑  
← 1 MWY SOUTH  
Hamilton

RAMP  
SIGNAL  
ON

KHYBER  
PASS

car.c.nz



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 delivery 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**

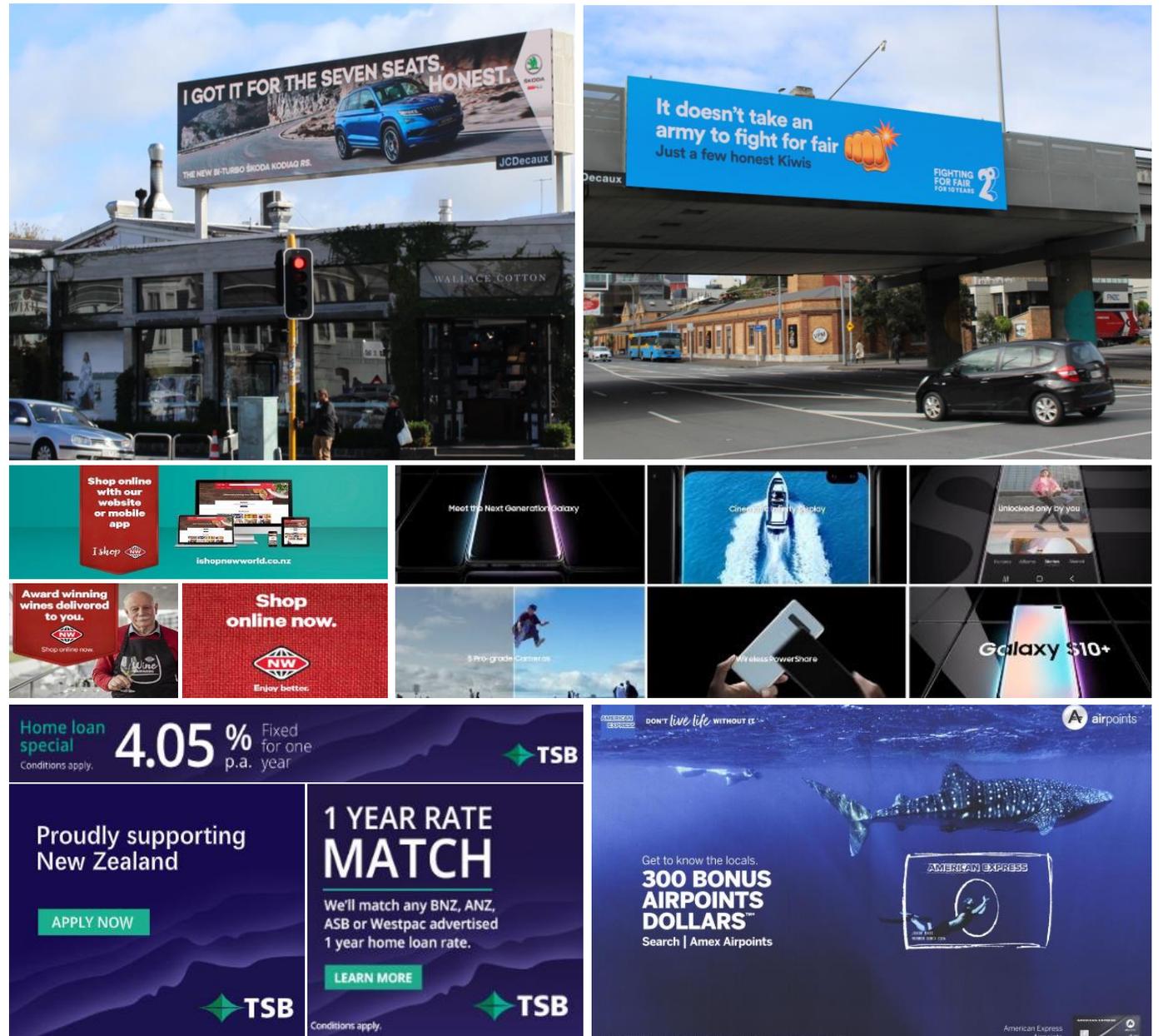
Ad campaigns included in the study were selected based on **category, media spend and range of channels used**

**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+



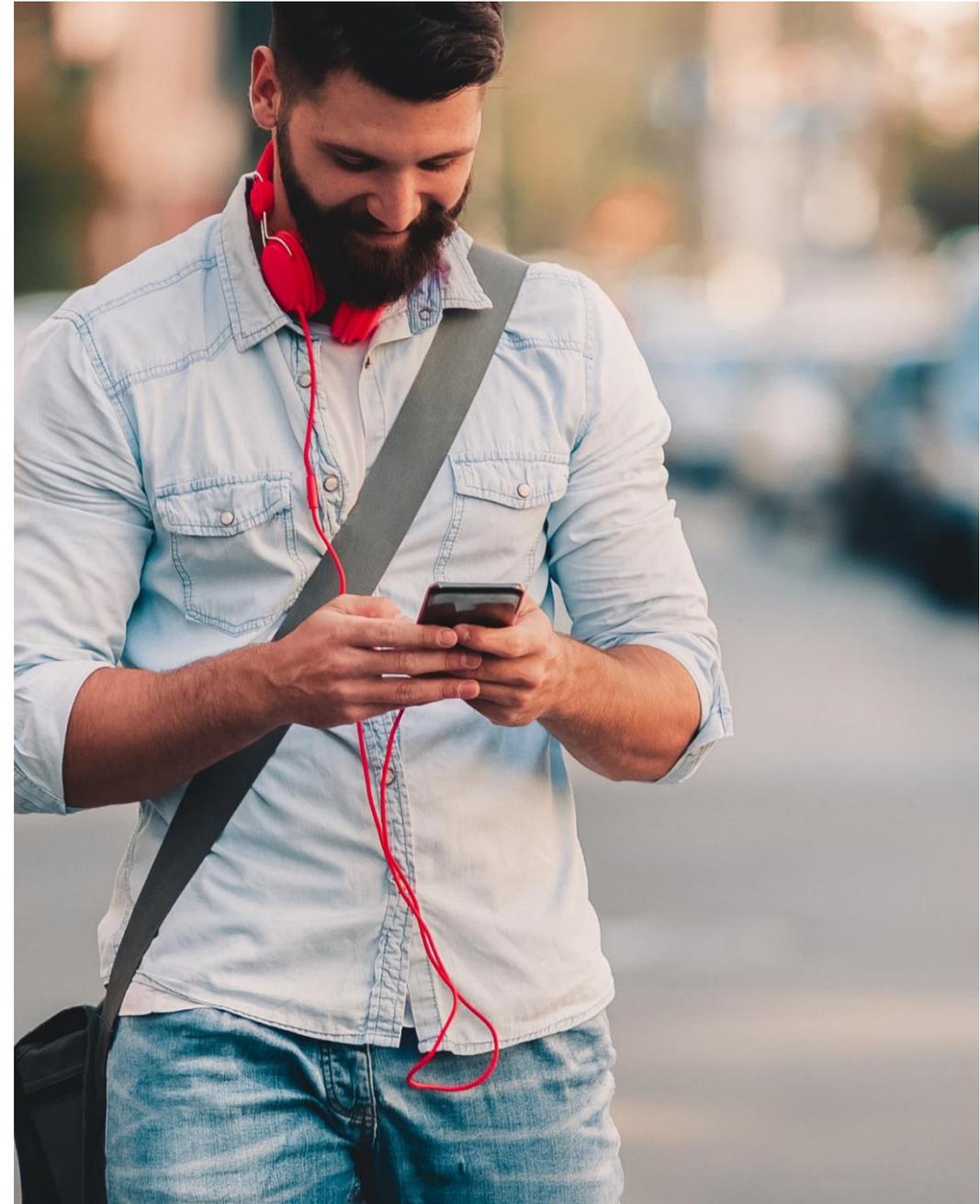
Combination of touchpoints across all campaigns selected

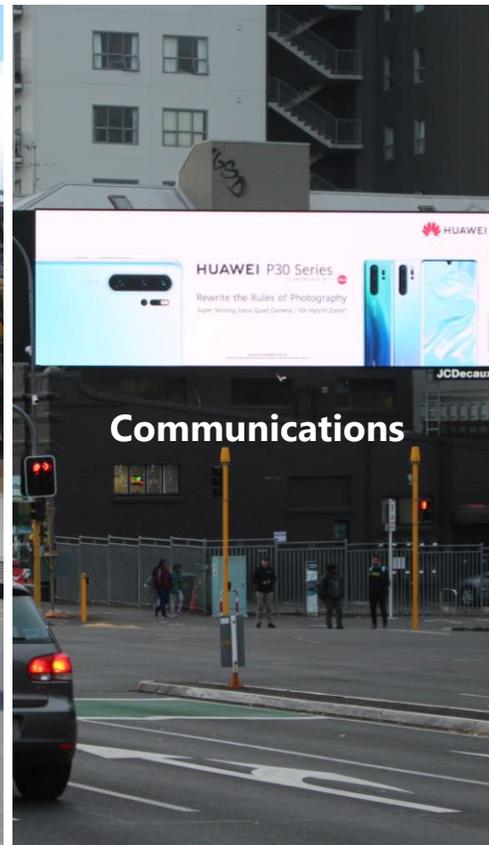
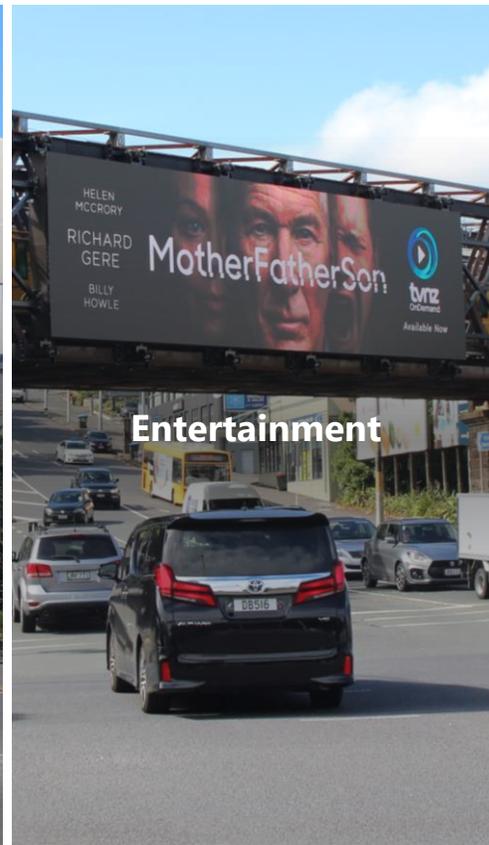
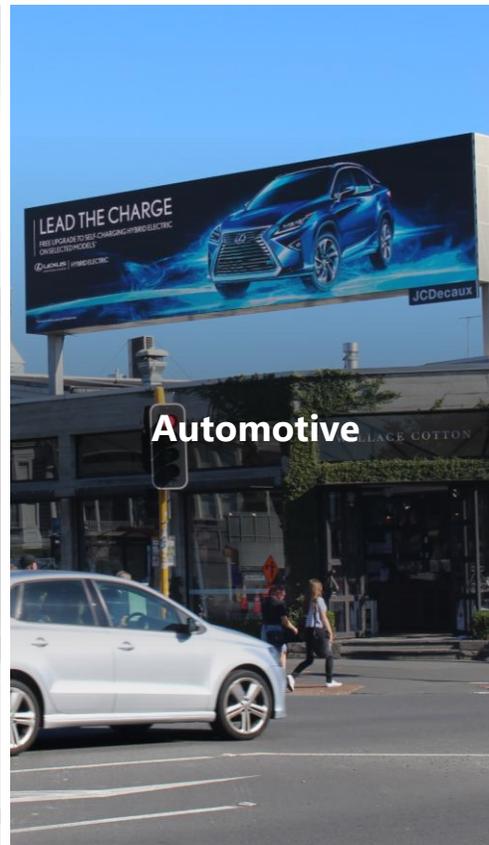
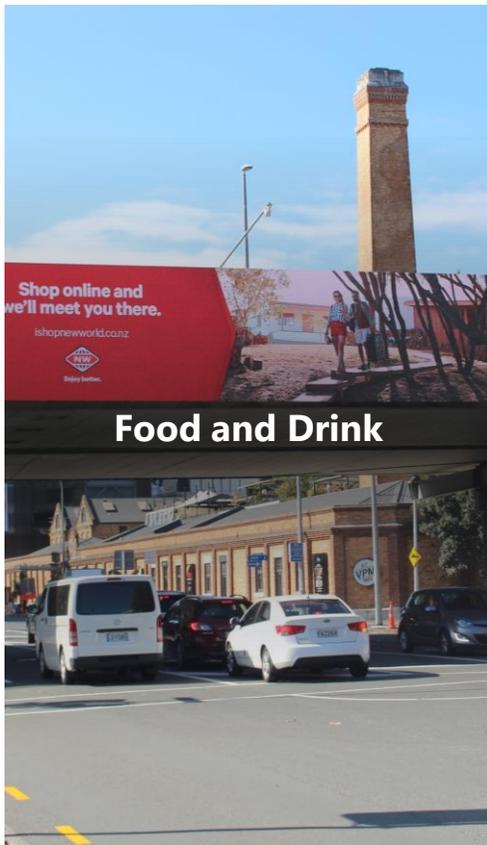
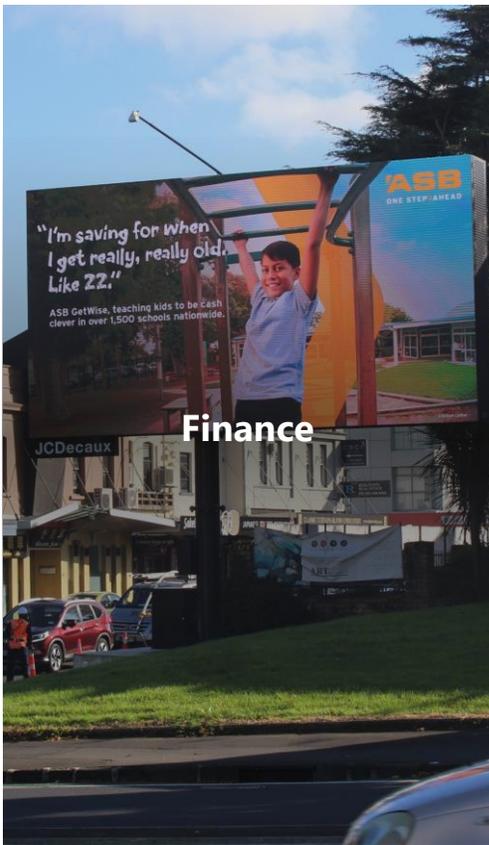
**JCDecaux** LARGE FORMAT

**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



CHOOSE YOUR X.  
THE X5.

JCDecaux

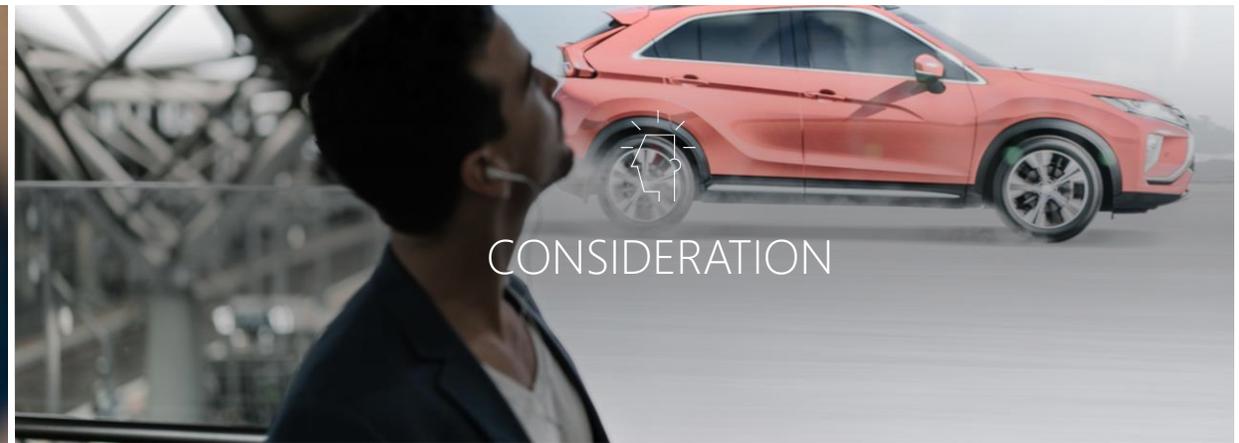
INTERNATIONAL  
ARCTIC  
CENTRE

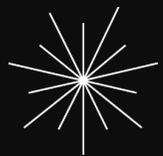


VISION FOR BRANDS

**RESEARCH** OF JCDECAUX  
NEW ZEALAND TOUCHPOINTS

# Four key metrics





+52%

Is interesting/ engaging

JCDecaux

fiftyfive5

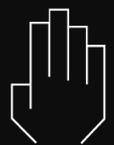


Shop online for  
a fresh catch.  
ishopnewworld.co.nz

**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

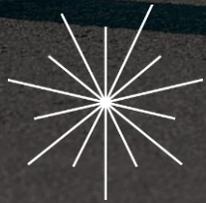
Exposure to any JCDecaux touchpoints was shown to **positively impact brand feeling measures**

Is interesting / engaging

Is a brand I trust

Is my preferred brand

Is a brand I would consider



**+52%**



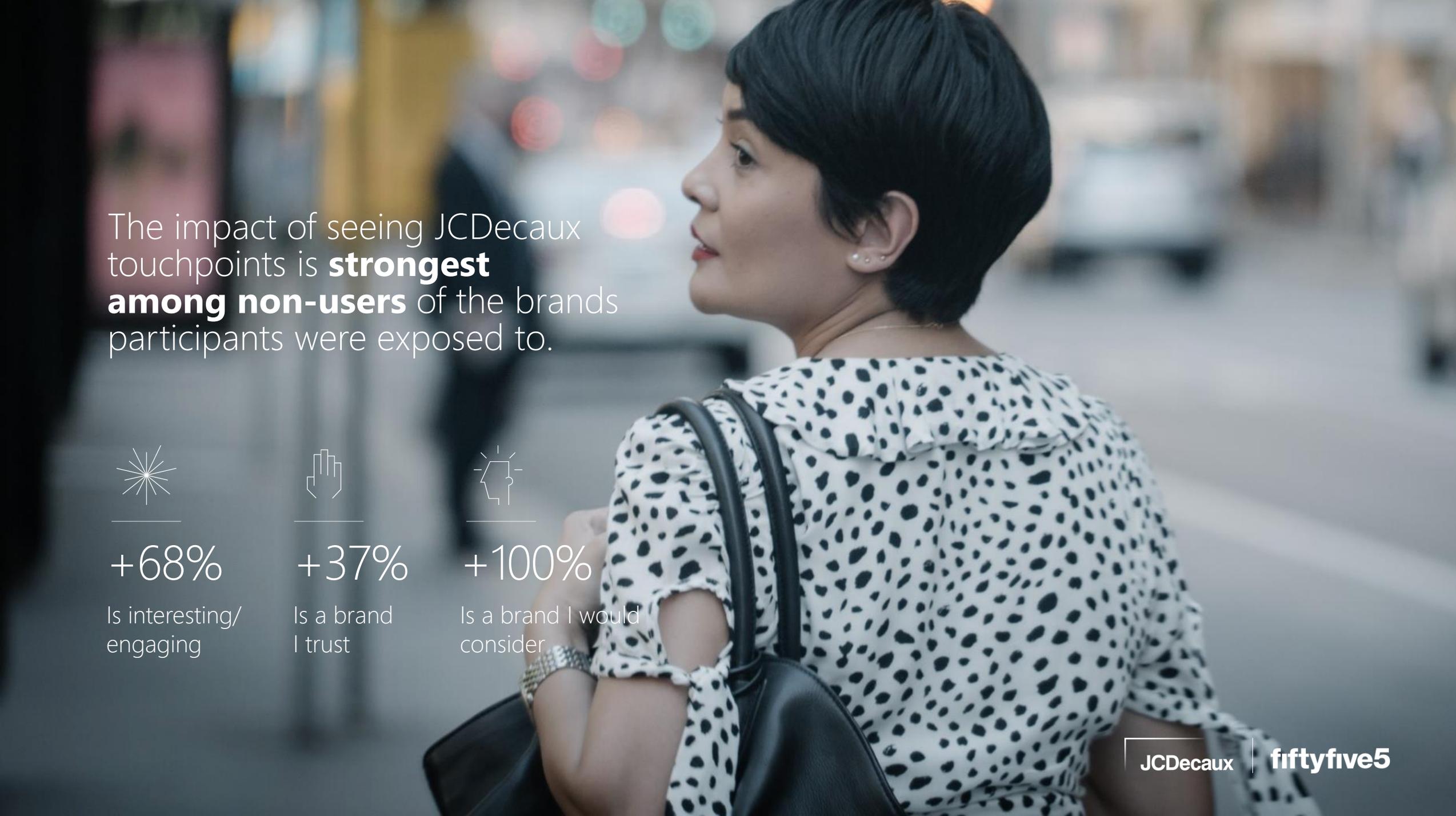
**+28%**



**+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**



---

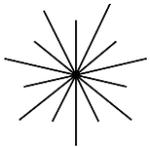
+308%

My preferred brand



## Finance

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



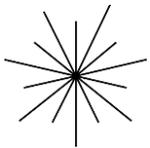
+110%

Is interesting/ engaging



## Communication

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



---

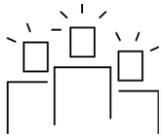
+63%

Is interesting/ engaging



## Food and Drink

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



---

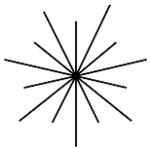
**+43%**

Brand I want to tell  
others about



## Entertainment

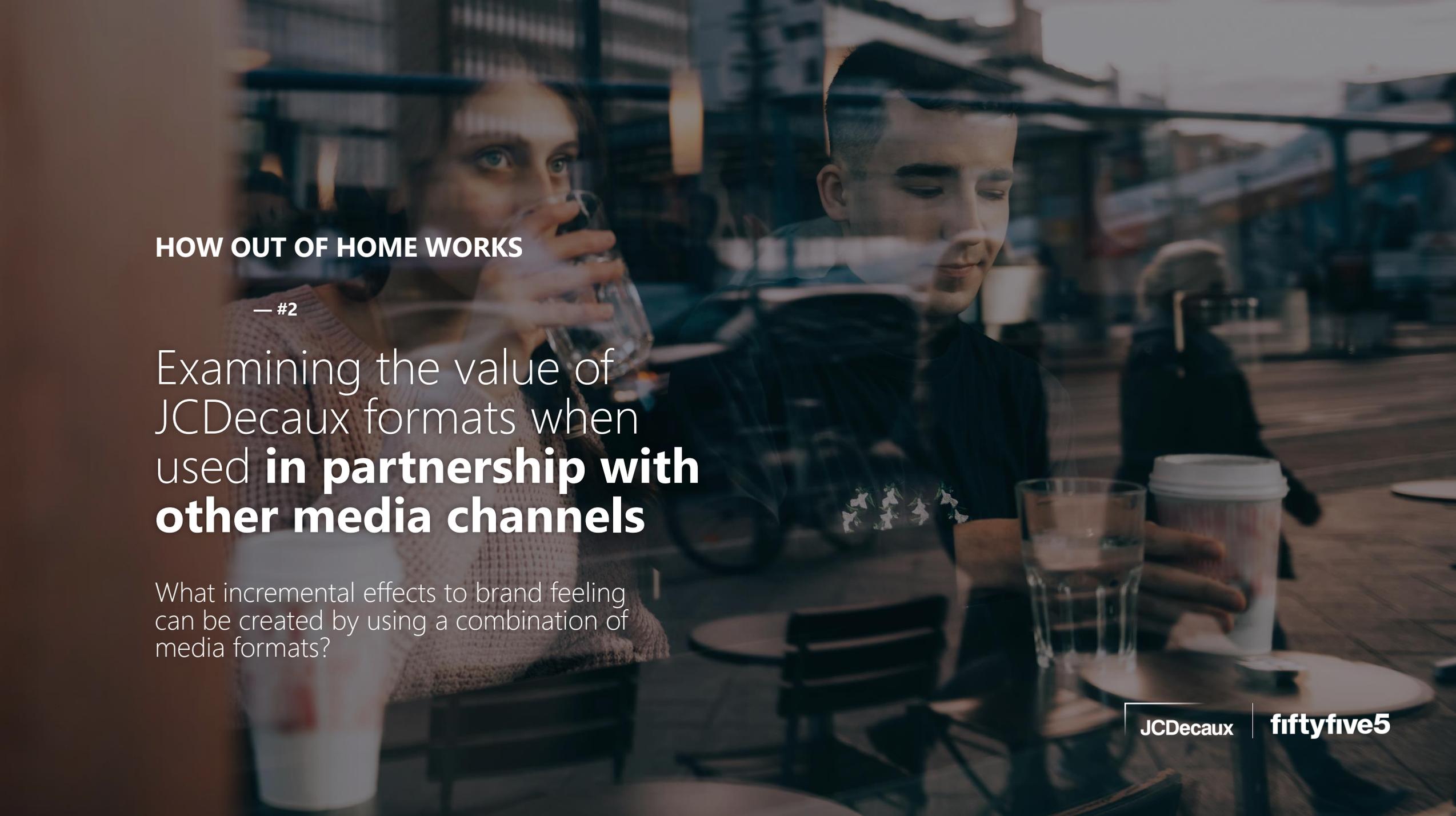
The superior stature, location and positioning of JCDecaux touchpoints maximises awareness to **drive interest/engagement and advocacy** in the entertainment category



+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 an outdoor cafe setting with other people and buildings.

## 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

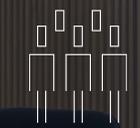
Out-of-Home presents a brand in a real world location and encourages action



**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**

---

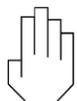
Exposure to any JCDecaux touchpoints was shown to **positively impact all brand feeling measures in the finance category**



---

**+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



---

**+21%**  
My preferred  
brand



---

**+52%**  
Is a brand  
I trust



---

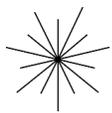
**+20**  
Consideration



Category  
**Food and drink**

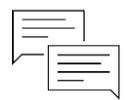
---

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



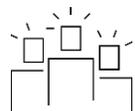
---

**+17%**  
Is interesting/  
engaging



---

**+59%**  
Seeing and  
hearing more  
about



---

**+43%**  
Brand I want to  
tell others about



---

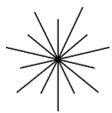
**+10**  
Consideration



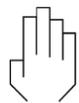
Category  
**Entertainment**

---

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



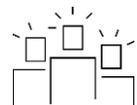
**+44%**  
Is interesting/  
engaging



**+28%**  
Is a brand I trust



**+9%**  
My preferred  
brand



**+43%**  
Channel I want to  
tell others about

