

## Reflections on FEPE Milan - Barry Sayer, President, FEPE International

Friday 22<sup>nd</sup> June 2012

As flight BA 63 took off from London Heathrow Terminal 5 en route to Kampala, Uganda with Rossini still ringing in my ears I reflected on the richness of the two days spent in Milan, Italy both from an outdoor advertising content point of view but also mirrored in the spectacle of the Gala dinner in the magnificent Palazzo Clerici so appropriate a backdrop for the operatic delight delivered with customary Italian passion.

And what learning's from the Conference itself? The stage being so appropriately set by **Jeremy Male, CEO UK, Northern Europe & Australia of JC Decaux UK** in his positioning pace of change quote from Stuart Brand "If you're not part of the steam roller, you're part of the road." Young, affluent connected audiences ... the Facebook generation, "we had them first" Jeremy reminded us and still do. The great internet challengers are also not invincible. Even though valued at \$104 billion this year Facebook sometimes gets it wrong, so we may be allowed some Schadenfreude Jeremy suggests, particularly given this disastrous listing followed by the announcement from General Motors that they had cancelled all their advertising on Facebook because it just didn't work for them. And of course Facebook remain challenged by not really having a good money generating mobile solution in an environment where mobile is overtaking computers as the chosen access device for internet interaction.



Whilst Jeremy applauded our development in the digital space he cautioned that electronic media was the tip of the iceberg and consequently we should not lose sight of the extensive investment we have made in other outdoor product which still need to be sold. However in addressing the flexibility and capability digital Out-Of-Home has introduced to our businesses, "the shop on the street" concept introduced for the Koreans by Tesco for example, the medium has found many new revenue generating possibilities. Jeremy encouraged that we grasp the new "outdoor shop on the street" opportunity in other words the opportunity to transact through interactive out of home displays and confirmed it as the domain of outdoor advertising companies before the concept is capitalised on by other predatory media types or indeed invader businesses like the electronics industry or high street stores themselves. Jeremy encouraged that we spend more on product, a theme reflected by Chris Tyquin in his reference to the higher prices his company in Australia is getting for better looking structures. Jeremy also echoed the sentiments of Matthew Dearden of Clear Channel in his reference to digital out of home quoting Matthew as saying that "If all we do is go from paper to pixels and nothing else changes, digital will never pay out."

Jeremy also reminded us that we need to be more cognisant of who is viewing our medium, when and in what state of mind and encourage all to familiarise themselves with the work done by the Outdoor Media Council in London who are monitoring outdoor media audiences and their attributes by regular mobile phone questioning of a chosen sample of respondents. Further on research Jeremy chastised the industry for not doing more to demonstrate how outdoor works with mobile and search which TV had. TV had made a good case for the benefits of using television with mobile advertising and the internet. We need to do more in this regard especially given that the econometric

work done by Sally Dickerson who was first introduced to the outdoor advertising industry at large by FEPE at the FEPE Sardinia conference. Sally's econometric studies have proven conclusively that Out-Of-Home is the only medium that consistently adds exclusive reach to a television or internet based campaign. Other media just duplicate existing reach by the television campaign and only add additional frequency or repetition, not additional reach. This is a point that we should strongly drive home as an attribute of our medium.

I was particularly pleased that **Andrea Mezzasalma the Head of Audience Research at Sky Italia** agreed to present to FEPE. Firstly because he's Italian and Italy was our host country. Because he has a broad industry perspective and has the ability to tell us how we stack up against other media in the research stakes particularly broadcast versus OOH. But particularly because as a partner at Eurisko now GFK Eurisko he designed and ran the first portable based nationwide outdoor media company Audio Poster. Andrea titled his paper "Visions of tomorrow's OOH Measurement (from a yesterday's OOH measurement Pioneer)".

Andrea commenced his presentation by talking about what has changed or conversely what was news in media research. Certainly the cost of technology for audience measurement is decreasing and there is large volumes of large scale data generally available across the business and research community which is transforming the way TV and other media are measured. The OOH industry needs to grasp these developments. What Andrea is more interested in than passages past outdoor advertising signs is how frequently and how many of his prospective clients or customers were or will be actually exposed to his specific OOH advertising campaign and as a consequence, how effective was or will his OOH campaign be. Andrea would therefore start by collecting representative user centric data about his prospective customers and their profiles to understand his prospective client. He would then seek outside centric data with regard to where his advertising panels are most likely to be located and all relevant knowledge about each particular site making up his holding. He would combine these two sets of knowledge with large scale non-representative user centric data from broader relevant data sources which would give him further information about where his prospective customer might be found.

As far as Andrea is concerned GPS is essential to audience measurement for the OOH industry because even when such technology was limited in its availability it proved to be the only certain way of understanding the way people moved around a city, town or village without having to rely on memory recall. It is also true that whilst people generally think they take the same route each day to work by example, the reality is that they will often vary their trip because of errands that need to be run or other distractions like meetings that take them in another direction. In today's environment with the extensive use of GPS for tracking journeys like vehicle tracking systems or internet systems like Google maps and street view use of GPS should be standard.

Andrea found it inconceivable that most media currencies still neglect to collect lifestyle and purchase behaviour data about their target audiences, emphasizing that the person he seeks to communicate with is his prospective clients, not just people in general. He wants to know who of his prospective clients will actually be exposed to the campaign or have the likelihood to see it (eyes on) compared with the exposure his clients would have to the opportunities offered by competing media in the same media category. And to understand what that general mediums performance is in reaching that prospective client across the country, and in comparison to the performance of other media types.

Andrea also spoke about the importance of understanding the total exposure of his prospective clients to his OOH campaign as opposed to their exposure to individual sites. And finally he wants to know how effective his advertising campaign was or will be in reaching his prospective clients en mass or in total. He would then use some large scale outside databases to check whether he is on target in other words by looking at large scale travel databases and large scale consumption databases. To see if they largely correlate with his plan or post-campaign to attempt to establish the performance of his campaign versus general market averages or general market consumption for the product or service. He would however have to remain cognisant of price rebates, competitor's campaigns and other activities happening in the market place that could affect the result of his campaign relative to

the broad industry reporting he noted. Andrea also cautioned that short term effects were far easier to measure than the long term ones given the unknown or unexpected variable that can come into play over a longer period.

Ideally if budget allowed Andrea would also measure the real quantifiable effects on the product or service promoted by measuring the uplift of intention to buy or intention to recommend purchase of the product or service post-campaign.

**Chris Tyquin, Joint Managing Director of GOA**, disabused us of some of the fallacies of Australia before giving us a comprehensive update of the demographics of the country, continent and its size relative to Europe and the USA. Only 22,329 million people, 95% of whom live within 5km's of the coastline on such a vast Continent / Country.

TV, newspapers and online dominate the media landscape in Australia with Out-Of-Home enjoying the 3<sup>rd</sup> least spend to Pay TV and cinema. However whilst most media saw a decline in revenues in 2011 vs 2010 outdoor saw the second biggest increase at 3.4% (AU\$500 million total outdoor market) to online's massive 18% growth.

Out-Of-Home measurement in Australia is conducted under the Move study (Measure of outdoor visibility and exposure) which is the first industry wide audience measurement system for Out-Of-Home media in Australia as endorsed by the Outdoor Media Association (OMA), the Media Federation of Australia (MFA) and the Australian Association of National Advertisers (AANA). Move measures the audience of all major formats outside of the home including roadside, railway stations, airports, busses, trams and shopping centre audiences. The currency for Move is likelihood to see (LTS) as opposed to passages past outdoor advertising signs or opportunities to see (OTS).

Revenues generated in Australia breaks down to approximately AU\$170 million on roadside billboards, AU\$75 million on transit media, AU\$65 million on retail media (shopping malls) and AU\$180 million on other roadside. Outdoor has enjoyed sustainable growth in revenues for 10 years. The major players being OOH, APN Outdoor, Clear Channel Outdoor, JC Decaux, Adshel (which is a partnership between APN and Clear Channel Outdoor) and Eye Corp.

Chris raised a number of cautions for the outdoor advertising industry from his experience in Australia. Firstly government regulation. Whereby government had become concerned about the content of outdoor advertising signs which became an issue in 2011 due to overtly sexual messages carried on Out-Of-Home advertising which had sparked two parliamentary enquiries into the possibility of the introduction of government regulation to control Out-Of-Home. Currently Out-Of-Home is self-regulated and must meet community standards which is overseen or adjudicated by the Advertising Standards Bureau. The outcome of the parliamentary enquiries were fortunately not the introduction of government regulation but recommendation for amendments to self-regulation resulting in the OMA introducing a Copy Advice service for creators of outdoor advertising and training for all OMA members on the self-regulatory codes. Since then only two complaints have been upheld, neither of a sexual nature and which consequently have gained little media attention. It appears the Australian industry has successfully averted government intervention.

Chris also outlined an issue over overt advertising to the Gay community and condom advertising that could be deemed to encourage sexual activity. His cautions were that significant interest was stirred up using social media yet conversely the outdoor industry was able to use social media to successfully defend their own position. There certainly is a lesson to be learnt by all Out-Of-Home companies and associations, to be ready for similar attacks on our medium in other countries and to have a defence plan in place in order to deal with the press and the public and the government regulators via the various electronic or printed media. Indeed it is necessary to decide who the spokesperson should be in such eventuality and to have the necessary industry consultative committees in place.

Chris outlined the opportunities that abound through the interactive digital medium and introduced the interesting interactive facial recognition technology used in the Magnum ice-cream campaign in Australia which identified a smile from passers-by.

Investment in the quality of outdoor advertising structures through the use of industrial designers has resulted in an increased margin off advertising structures of pleasing aesthetic design proving the investment well worth it. Again the theme of Jeremy Male's presentation was echoed in that digital Out-Of-Home should not be a conversion from the early days of paste and paper to pixels but creative and innovative use of digital's technological capability. In short to make the advertising more interesting and fun through interactivity and other means of two way conversation. To generate a deeper engagement with the consumer as so eloquently advocated by Anna Reeves of CBS Outdoor in her address.

Fortunately **Bob Wootton the Director Media and Advertising at the Incorporate Society of British Advertisers (ISBA)** agreed to join us to explain to us the increase of government interference in our industry particularly emanating from Brussels. Bob has spent an illustrious career in the management and ownership in some of London's most successful advertising agencies subsequently joining ISBA in mid 1996. ISBA is the voice of British Advertisers and has been since 1990 and is the second largest Advertiser Association in the world still playing a leading role in the world federation of advertisers.

Bob addressed the changing approach in influencing the new world which in the case of Europe was being dictated to more and more by Brussels. The creative industries in his view were somewhat disorganised and not unified in the defence of interference from Government regulatory bodies. At the same time media platforms are becoming more global and there is a recognition by Governments that local regulation is perhaps inadequate and therefore National Governments becoming less important and less effective in the control of media. Indeed many traditional media still laboured under the restrictions of existing National legislation whilst new global media such as the internet appeared to enjoy more freedom because National Governments were confused as to how to control them. ISBA recognises the need to influence and protect our industry at much higher levels than previously was the case.

There is also the matter of tensions between buyers and sellers within our media world and indeed between the various media themselves which concerns ISBA. What had to be recognised however was the rapid pace of change in media and society. Bob reflected on the issues of e-privacy which was perplexing global Governments and what information was being retained or accessible to internet providers. As a consequence Government's are looking closely at the growth of the internet and how, where and if they should become more involved and impose more regulation for control. Bob cautioned that we should not be indifferent with regard to these developments as ultimately legislation influencing social media will eventually affect all media. Bob felt that the best way for media owners to protect themselves from any unwelcome regulation is to unite and stand together and share information on these developments. Clearly FEPE provides the perfect platform for the Out-Of-Home industry to monitor these developments and protect the industry from any unwarranted attack. Bob pointed out that currently legislation pertaining to 'cookies' or the basic template of information retained by internet providers was patchy and inconsistent across the whole of the European market which provides a legislative minefield for advertisers to negotiate when participating in social or other electronic media across broader Europe and the Scandinavian countries. Bob cautioned FEPE and the OOH industry to become aware of what was going on and to get engaged and involved.

Bob addressed the issues of complexity which the new media landscape has created and confusion certainly exists amongst advertisers as to how, where and what to buy placing more burden on advertising agencies to interpret the opportunities in media. Bob stated that everybody in the chain from advertiser through to media owner is having to work harder and faster in the new media world. He mentioned that ISBA members were somewhat disappointed in agency enthusiasm for new media ideas but of course that brings us to Annie's point about the additional understandable demands that clients are making on media buying and planning agencies for more information and as a consequence of media fragmentation more media diversity with the incumbent cost implications. Who pays for the additional services? Clearly a new model has to be considered. Again with the fragmentation of media and the development of new media platforms, producing materials for the multiplicity of new media platforms is becoming

more complex and more disconnected from the advertising agency. Bob felt an opportunity existed for outdoor companies to provide a more extensive production facility for which additional revenue streams could be generated.

Transparency remains a concern amongst ISBA members particularly in regard to rebates and buying deals and of course issues such as brokering, trading, measurement of the media all appear to be under scrutiny with perceptions of media rebate deals varying by territory with countries like Russia, Ukraine, Turkey, Greece, Italy and Spain being perceived as very negotiable areas and less transparent through Germany and Poland who get a better rating, France and the UK being relatively well understood and transparent and the Nordics being of little concern.

In fact to prove the point Bob tabled a WFA Online Benchmark Study which asked members “do you currently use your agency group’s trading desk and if not, why not?” The response was that 33% did not use their agency’s trading desk the reason given being the perceived lack of transparency, or concerns about conflict of interest at agency. On the positive side 56% did use their agency trading desk. In another interesting chart Bob presented there was a difference in opinion from advertisers versus their agencies on issues such as advertisers having the right to know actual costs charge by media owners to third parties. “Agency fees falling as agency profits rise” possibly demonstrating that agencies and media owners are being less transparent. “The squeeze on remuneration is also having a negative impact on innovation?” upon which subject both advertisers and agencies were almost at one. With regard the statement that “agency trading desks are a threat to transparency,” only 8% of agencies agreed, but 84% of advertisers agreed with the statement.

Bob also raised a concern about the behaviour of media using the example of the Murdoch enquiry as adding a new dimension and an issue which has certainly raised the concern of Governments. Bob urged innovation in our medium and presented some interesting examples of what could be done and encouraged new interactive capabilities for outdoor.

Under his final thoughts which he entitled “Four Calls to Action / Bob’s Manifesto” he said we should influence our destiny by organising, engaging and uniting and empowering our representative bodies. A responsibility for which FEPE would welcome participation. Second on Bob’s list was our need for solution based strategies which would make it easier for our customers to spend with us. Bob asked that we respond to wider industry concerns as his third point, especially on the transparent issue and encouraged trust and openness and finally he said that we should celebrate our vibrant medium.

**Pierre Henri Bassouls, Founder and CEO of Prismaflex International** presented a number of new innovations to the Congress. Pierre Henri and Natalie Bassouls and their company Prismaflex remain platinum sponsors of FEPE and their support of the organisation over many years enjoys our deep gratitude. I think it important that we reflect of the importance of our suppliers to our industry where in the case of Prismaflex and many others the company is devoted to ideas and product for the Out-Of-Home industry which help propel us well into the 21<sup>st</sup> century and their role and capital expenditure in the pursuit of outdoor excellence earns them their rightful place in the Out-Of-Home family, standing together with outdoor media owners and specialist media agencies in protecting and growing our market share against the plethora of traditional and new media competitors.

Pierre Henri presented a number of new innovative media products featuring new eco-friendly material substrates for our existing Out-Of-Home displays, new photo voltaic scroller products which will help us further our green credentials by drawing power from the sun and the new Wysips photovoltaic translucent materials that can be applied to the glass face of a bus shelter or that of a flexi-glass billboard to provide a larger surface area from which to farm sunlight without detracting from the creative material on the face. Prismaflex have also developed an extensive range of low energy consumption LED lighting systems which help enhance the luminosity of our backlit structures



and the ability to generate more lumens from solar power. Prismaflex also now have digital billboard displays that can feature a digital display on one side with a light box or backlit unit on the back. The company has also developed a computerised billboard management system and electronic monitoring systems that can report the condition of a display.

**Alec Kenny, Head of Business Development at Fairbrother Lenz Eley** kindly joined us due to requests from members for information regarding the phenomena of media monitoring and the role of the media auditor in the policing of Out-Of-Home campaigns. Although Alec had spent the vast majority of his career in advertising agencies in London including being Media Director for the then biggest full service advertising agency in the UK and co-founding another UK media agency in 1990. He did spend some time in South Africa as Managing Director of one its largest media agencies and has been developing business in South Africa for Fairbrother Lenz Eley out of the United Kingdom. Alec remains a fellow of the Institute of Practitioners in Advertising in the UK.

Alec challenged with the thought that “If you can’t measure it, you can’t control it” in other words you need to be able to quantify the performance of a media campaign to ensure the money is well spent and if you don’t know what return one enjoys on any outdoor advertising spend you have indeed lost control. Alec quickly disabused us of the thought that media auditors might offer media planning or buying services to advertisers in competition with advertising agencies or media agencies. He assured us they do not, nor would they want to. Neither was their intention to seek out inefficiencies in the media buying or planning activity. As he said “They did not get paid more for marking planning and buying services down”. To the contrary they were happiest when they found the media planning and buying activities to be in good shape and indeed welcome the opportunity to report appropriate delivery by media owners or media agencies which made their job a lot easier. It is true however that they do mark agencies homework from a quality and price point of view and are more than happy and indeed obliged to interact with the media agency on their findings and to add constructive advice or criticism whichever appropriate. As Alec said and was endorsed by Andrea Mezzasalma advertisers rent eyeballs and it was the auditors job to confirm this was been done as economically as possible.

Of course from the Out-Of-Home media owner’s point of view, one of the concerns that has always plagued our business is transparency and whether the advertiser is receiving that which they pay for. If media auditors provide advertisers with this comfort and the confidence to use the Out-Of-Home medium then this must surely be to our benefit. On a very broad basis I would advocate that the outdoor advertising industry has nothing to hide and in fact would welcome the opportunities to trumpet our professional activity and diligence in the field. The media auditor provides us this mouthpiece.

Conversely if confidence in outdoor media buying, planning and delivery is questioned then the result will be that money will be taken from our medium to flow to other media channels. The media auditor therefore appears a welcomed contributor to the professionalization of the Out-Of-Home industry.

On another matter digital Out-Of-Home presented a whole new dimension to the auditor, a subject which FEPE intends to engage with Alec and the audit community. Certainly media auditing is a phenomenon which is spreading worldwide because it is demanded by the advertiser.

**Anna Reeves, International Marketing Director of CBS Outdoor International** presented a paper on Interactive Europe, first asking the key question of whether we should be worrying about interactivity at all right now before convincingly arguing the case for why we should. What does the audience think about interactive Out-Of-Home? What are the technologies and the pitfalls to avoid when enacting an interactive campaign and indeed how does interactive Out-Of-Home work with Social Media.

Interactivity she defined as anything that invites a consumer to interact with Out-Of-Home. Largely technology driven with smart phone devices particularly unlocking the potential.

From various CBS studies particularly the CBS Media on the Move study, Anna declared that consumers are positive about brands that encourage interaction. Smart devices were unlocking the potential for interactivity. Consumers generally had a positive view about a technology driven future but they wanted something of value in return resulting from the engagement. Interesting but understandably given the embryonic stage of interactive Out-Of-Home media awareness. The knowledge and the ability to interact with outdoor media is low, as is the number of people currently participating but it is on the rise as awareness of the facility increases.

Anna observed that the parts of social media and Out-Of-Home continue to converge and are increasingly complementary with interactivity driving deeper levels of engagement between consumers and the Out-Of-Home medium.

Kantar Media Research conducted the “Media on the Move” study on behalf of CBS in October and November 2011 amongst 9000 respondents in UK, Ireland, France, Spain, Italy and the Netherlands, targeted at 18 – 54 year old adults who work in or visit urban areas at least 3 times per week. 74% of respondents generally expect to see big brands on outdoor. 66% feel that Out-Of-Home advertisements offer a welcome distraction particularly when travelling and encouragingly 51% felt more likely to pay attention to Out-Of-Home advertising than any other form of advertising.

I particularly enjoyed the concise almost child story book style of graphics that Anna imaginatively used in her presentation to so aptly illustrate her points. For example the interactive Out-Of-Home display outside a coffee shop from which passers-by were invited to download a discount voucher by QR code onto their smart phones, so driving them into the coffee shop to have a coffee on redemption of their electronic discount voucher. Interestingly over half the respondents in the “Media on the Move” study claimed to now own a smart phone as opposed to the cheaper models.

The “People on the Move” study certainly proves the change in the media landscape, the changing path to purchase i.e. that which is driving people to the purchase of a product or service like the discount offer dispensed via the interactive Out-Of-Home display. The fact that people are transacting, seeking information and news whilst on the move through smart mobile devices is evident from the study.

So whilst consumers generally welcome interactivity with Out-Of-Home media they will participate if there is a monetary benefit by discount coupon for example or for the entertainment value i.e. if they can download music or a video clip or participate in an amusing interactive game activity. Or can obtain useful information like cinema viewing times.

Anna explained that the power was shifting more from the media to the consumer through technology and interactive media. The consumer will reject media intrusion but responds well to invitation. Interaction or participation also creates a consumer experience which they will talk about so driving word of mouth. A good example is the “Running with Ryan” campaign for ASICS running shoes which invites people to run against a virtual image of a real Olympic athlete the length of a digital display wall at his marathon pace. A fun interaction with a digital display which promotes deeper engagement and a positive memory of the brand.

**Dr Kai-Marcus Thäsler the Managing Director of Ströer Digital Media** spoke to us about Ströer’s unique digital platform.

Ströer have existing small format digital platforms across the Federal Republic of Germany concentrating in 5 areas. Firstly in 200 train and metro stations which enjoy 125 million visits or frequencies per week. Secondly 1000 screens in 50 shopping malls which enjoy 35 million visits or frequencies per week and airport which enjoy 3.1 million

frequencies per week. Ströer have perfected the digital screen network in these closed environments so as to be a perfect national broadcast medium with advertisements and other information content downloaded from a central hub. In addition they have a further 268 large format roadside screens located at traffic bottle necks in top German cities.

Key to the network is the bespoke information or editorial content which can be targeted to specific areas.

Advertising is sold day-part and is complementary to mobile target groups. Advertising execution is also encouraged to be extremely creative. The Johnny English (Rowan Atkinson) attempting to attract passers-by on a machine station platform comes to mind.

The Ströer Digital interaction concept strives to provide more memorable and therefore impactful media interactions which first get people interested through interesting creative concepts. Thereafter the displays encourage commuters to interact with the Out-Of-Home display. They will then share the message or experience with their friends thereby generating word of mouth resulting in the advertisers message going viral creating a local or national buzz. This in turn attracts more attention to the campaign or promotion and encourages more people to become involved consequently with them also interacting with the Ströer digital medium.

Other concepts Kai-Marcus shared with us were Quicar, Volkswagen's car sharing digital screen promotion in Hanover Germany and another interactive display that could actually virtually fit you with a new pair of shoes, access size and arrange delivery of and payment for the product. Brilliant direct sales from a digital poster site. The first Out-Of-Home virtual shoe store.

**Paolo Guglielmoni the Executive Creative Director at IAKI and Executive Advisor at the Art Directors Club Italia (ADCI)** of Italy, a self-confessed Geek who we would more deservingly refer to as a creative guru, presented some hugely creative concepts for the use of OOH.

First of which was the world's biggest hug idea whereby the concept was in the support of a fund raising and awareness building campaign for abused children. The creative challenge was to make the iconic Rio de Janeiro Christ the Redeemer statue be seen to be closing its arms and giving a gigantic hug. By use of clever projection equipment and appropriate artwork projection of the Christ figure at night onto the statue itself created the illusion of Christ folding his arms to hug the world. Of course the promotion attracted worldwide publicity and gave the children's abuse cause massive global exposure which supported the concurrent fund raising effort.

Paolo also spoke about Nike Plus, a project between Apple and Nike whereby music can be played on your iPod which is in sync with your running pace.

Another was in Johannesburg South Africa to promote the new low emission Mercedes Benz. Billboard poster sites were posted with posters printed in a pollution absorbing fabric. Each day as the pollution levels rose the billboard surfaces darkened so illustrating the pollution that was being absorbed into the general public's lungs. Consequently it was advocated in the copy line that the purchase of the low emission Mercedes Benz would minimise the global pollution problem.

Paolo also featured the Korean HomePlus / Tesco virtual store in railway stations where-by posters depicting supermarket shelves packed with product carrying QR codes could be scanned thus ordering product directly from the poster site to be delivered to the commuter's home on arrival at their destination.

The Google voice recognition service promoted through posters carrying phonetic copy was also featured in Paolo's presentation. Paolo encourages us to connect with him at [www.Geekadvertising.wordpress.com](http://www.Geekadvertising.wordpress.com).

**John Williams the Deputy CEO of Moove Media Australia** presented the paper entitled the Law of the Jungle... the Rise and Rise of Busses in the New Media Order. John referred to man's primeval responses to opportunity or greed and danger or fear in the urban jungle quoting Kim Mukerjee who he referred to as 'an anthropologist in Adland' he expounded that "Man is a collection of pre coded chemical reflexes that respond to stimuli" he went on to say that the brain selects material worth retaining which is selective perception. "Man however is more open to media that are viewed when they are active and alert and are consequently more alert to moving media because of their size and imposing nature which if equated to our primeval days would be like our conditioning to react to an elephant due to our unsophisticated nervous system" he said.

Busses are universally mobile and very large thus offering a perfect communications vehicle at the right time when people are in the right, alert frame of mind in the urban city environment with all the attractions of large impact and mobility. Interestingly John's thinking is somewhat supported in the Postar work which I will review under James Whitmore's presentation regarding how our vision and senses particularly peripheral vision have evolved to detect the dangers of advancing objects and movement.

As flight BA 63 was now circling over the rainforests of Rwanda on the Ugandan border my mind did wonder to what the Gorillas in the mist protected by the treetop canopy might think of all this. Perhaps branded elephants might become the newest innovation in Uganda for Continental Outdoor Media though I'm not quite sure how to introduce a digital element to that or where to place the NFC tag.

Fortunately by popular demand we were able to respond to members requests for **Annie Rickard the CEO of Posterscope UK** to return to FEPE after her thought provoking presentation in Beirut. Lebanon in 2010. Annie certainly did not disappoint this time either. As CEO of Posterscope UK who bills in excess of £400 million per annum on outdoor media and now employing over 700 people at their 46 offices around the world as a consequence of significant expansion under her encouragement and vision, Annie remains a pioneer of the outdoor medium and strong contributor to the growth and direction of FEPE.

Annie challenged us to optimise the opportunity that now presented itself to the Out-Of-Home advertising medium in a rapidly changing environment, but commenced her presentation by laying out the challenges that confront us before proposing the way forward in growing Out-Of-Home's market share globally. In referring to money allocation for promotion and media activities derived from her insights into the allocation of advertising funds across media by her clients and their competitors globally, Annie supported her argument by referring to statistics in the US from Sherpa Studies that indicated that between 2011 versus 2010 in the US on average social media budget increases had exceeded 65%, website upgrades had seen a 65% budget allocation increase, content creation 53%, search 49%, online advertising generally 42%, email 39% whilst direct mail had received a 15% increase to allocation, print advertising 13%, tele-marketing 9% and broadcast advertising just 8% significantly Out-Of-Home wasn't even measured.

Annie looked at the drivers of success in the new communications eco system noting the rapid increase in the demand by consumers for access to the new global networks offered by Google, Facebook, Amazon and the like which provided easy access and left the consumer in control of the interaction. On the supply side capacity of the new internet / mobile global media platforms was almost unlimited, the scalability of their networks are well in excess of demand whilst they continue to add on more and more services and capacity whilst their speed of delivery is instant. What the outdoor industry needs to figure out is how it can find its place in this new media order and provide sufficient coverage collectively in its areas of operation to remain relevant, Annie cautioned. Clearly all media are searching to understand their role in the new order in collaboration and extension of the global electronic media platforms. Annie sees that we are in a two speed world for the next 5 years with Asia significantly outpacing adspend growth versus Europe and the USA, this is supported by a Zenith Media report published in March 2012. Adspend in the Asia region had increased by nearly 35% between 2010 and 2014 whilst Europe had seen approximately 8% increase in market spend over a similar period, whilst the global average sat at about 22%.

Annie saw digital technologies and the convergence of media platforms as the key drivers for growth in our industry and noted that social media remained both important to consumers and brands. It was no secret that new media owners were attempting to capture the total value chain and remained incumbent upon Out-Of-Home to innovate and co-operate in firmly establishing its position in the total value chain. Of course, as Annie pointed out the rate of change varied by region and was dictated by population age, the geography in which they were located and their access to electronic media.

Turning to the effect on advertising agencies Annie noted that consumers were assimilating the new scale technologies at a very rapid pace and accessing new media platforms vigorously. Certainly with this rapid escalation in choice there is an evolving complexity to the media landscape which whilst it creates opportunity it does provide increased demand by advertisers of their agencies for more analysis, more complex media planning, research and knowledge, which Annie noted also placed an extra cost burden upon the media buying and planning agencies and their need for a more diverse skills base. The convergence of media and interconnection of the various communication eco systems redefined the effectiveness and value of a campaign. The old building brand equity argument for outdoor might not any longer be a sufficient justification for the use of the medium and understanding of the new media and market environment becomes imperative for Outdoor advertising companies. Innovation will become imperative but outdoor companies need to ensure that such innovation is relevant and adds value. Annie pointed out that the convergence of media particularly with the addition of the social / mobile / internet world will require additional new trading platforms, planning and buying across more vast media spectrums and will consequently require new data to prove performance of cross media platforms which in turn will drive the need for new management, skills and ability.

Annie went on to report on the growth of digital Out-Of-Home adoption by media planners and buyers which to some large degree was also restricted or encouraged by the amount of digital product available. Again the Asian countries appear to be leading the pack with China showing a 41% of total revenues being generated from digital displays versus the rest of their Out-Of-Home fleet. In the US digital drives 25% of revenues in Out-Of-Home, the UK 14% and the rest of Europe 4%. As far as Annie was concerned looking at the overall media landscape she saw that we were only at the end of the beginning of the digital era and that she now found mobile and social media were baked into every single media plan. Annie referred to the need for us to find new ways to charge for what we deliver in other words a more pay per click model similar to internet companies or perhaps it's a combination with a price placed on the brand equity building value of the display plus an additional charge for the interactive element, certainly a concept that FEPE needs to pick up on and provide a platform for this debate.

Annie pointed out that there are now 3 million digital screens in the world so the outdoor Out-Of-Home industry has not sat on its hands and that there's been more change in outdoor in the last 5 years than in the offerings of social networks or the internet / mobile arena generally. In addition she commented that people are spending more time out of home and on the move particularly the young and employed and are transacting or searching for information more and more in the Out-Of-Home environment which would accelerate given the rapid adoption of mobile smart device technology.

Annie saw that the increase in coverage by digital screens as creating a whole new media channel allowing people to access digital screens in the Out-Of-Home environment. This provided the opportunity for a deeper level of engagement with the Out-Of-Home medium than ever before. By example Annie spoke about people commenting through internet linked Out-Of-Home screens on news events broadcast by Channel 4 in the UK. New Year greetings promoted in China by Coca-Cola whereby via websites consumers were able to send New Year's messages to friends and family on digital screens in the Out-Of-Home environment. Annie spoke about the opportunity or necessity for integrated mobile Out-Of-Home planning as nearfield communication technology is now being included in all new smart phones. This technological development will continue to grow and add new opportunities for outdoor. Phones will become the travel card or the electronic wallet and the opportunity exists for more transacting with the 3 million connected screens.

Annie defined her 6 future defining themes for our industry to be ... “Integrated media Out-of-Home planning.” “Out-Of-Home providing new gateways to content and transaction.” “The introduction of real time content to outdoor displays.” “Real time optimisation and trading” which I guess would provide for day-part selling. “Value through data” knowing more about who we are reaching, when and in what frame of mind as example. Finally “Utility through technology,” our media displays becoming more useful to the consumer by use of technology which reflects on Anna Reeve’s theme about people interacting with outdoor displays if there is a reward by coupon redemption for example, or the provision of information such as the time of movie shows or for entertainment value i.e. the download of a music track or video clip, or in the case of Annie’s example complimentary Wi-Fi sponsored at an electronic display location by in one instance, Credit Suisse. Or the ability to access Yell information directly from an electronic poster site.

To optimise the opportunities facing us, Annie reminded us that the adoption of smart mobile device technology is growing exponentially and that 68% of people in the United Kingdom intend to change their handsets in the New Year facilitating for far more interaction with Out-Of-Home displays. We however need to educate consumers regarding the new facilities being offered by the Out-Of-Home medium. Research from the Media Centre in the UK found that 36% of people felt that Nearfield communication would be important on their next phone however after viewing a video of new interactive opportunities and products 70% felt that NFC capability on their next phone would be important.

In her closing comment Annie said “Let’s be braver and share information with each other and think globally.” As a consequence FEPE have decided to place all the presentations from the FEPE conference in an open source location for access by all delegate’s to the conference not just members of FEPE. An important consideration is that if we acknowledge that the new internet, social and mobile networks are global platforms outdoor needs to stand together as a global opportunity or platform. Annie also encouraged us to move and to move faster because the internet is instant and again the electronic media are investing vast sums of money in scaling their networks. Annie invited us to visit [www.slideshare.net/posterscope](http://www.slideshare.net/posterscope) and [www.pioneeringooh.com](http://www.pioneeringooh.com).

We had **James Whitmore the CEO of Postar in the United Kingdom** at our conference in Sardinia in 2009 presenting the merits of the Postar OOH Audience Measurement Study. Of course the industry has moved on since then and Postar are at the point of launching new Postar after 10 years of trading under the old model. Unfortunately new Postar still exists under embargo preceding its launch. However there were some new findings that James was able to share with us and hopefully we can persuade him to return to FEPE after the launch of the new study.

In summary of Postar James informed us that the organisation was formed in 1996 and was a joint industry committee for poster audience measurement in Great Britain which measured roadside media. In 2008 however it was recognised that there had been a rapid expansion in the OOH medium into new environments and new types of displays but it had proved difficult to extend the existing measurement methodology to include these new sectors. As a consequence Postar decided to create a new currency from scratch to measure audience across all platforms that being road, bus, tube, rail, retail and airports. The research was to also take into account moving images such as scrolling or digital product and had to be future proof in other words to be adaptable to further change in the media landscape and OOH product types.

It was decided that there certainly needed to be a single currency across all the media types and their environments. There needed to be eye-tracking measurement to understand the effect of scrolling and digital signage. As James explained, the simplest contact with OOH results from a simple trip with an origin and a destination. However for the average person a trip is more complicated and broken down into a number of segments. In other words it might involve a walk from the home to the train station, a train trip to the tube station, a walk from the tube station to the retail mall and then a walk from the mall to work. Each segment offering different opportunities to be exposed to different outdoor signage of various formats. It is estimated by Postar that the British population undertake some 6 billion separate travel segment journeys each week so it is a huge and complex task to measure this movement and

the population's exposure to outdoor advertising panels. So far Postar has collected data for 2.27 million journey segments.

Arising from the new Postar study as we would generally expect three quarters of travel is done during the week in fact 77% now measured and 23% in the weekend. The average person spent 12 hours per week travelling and covers 241km. Men travel 288km a week and women 197km thus men are travelling for 13.8 hours a week and women 10.7 hours. James reminded us that in the UK it is the responsibility of the media owner to map their inventory using a system devised by MGE Data called the IMS or Inventory Mapping System. The travel survey was conducted by IPSOS having surveyed more than 23,000 people each carrying a GPS device for 9 days which includes 1 working week and 2 weekends. Finally all the findings are adjusted for likelihood to see based on work conducted by Birkbeck College in the UK. James emphasized the importance of a passive measurement tool which eliminates the need for diaries and therefore memory recall. The travel behaviour is monitored as it happens second by second. James demonstrated to us visually the traffic intensity model which shows the visibility arc around a billboard panel through which a person would need to travel in order to be counted as a potential viewer. James posed the question whether movement automatically captured attention and on the theme of John Williams, James said that detecting movement is essential for our survival so our attention is immediately sparked by movement. We also are aware of movement at the edge of our vision for survival reasons (peripheral vision), consequently eye-tracking became an important technique for the measurement of movement or "likelihood to see." James demonstrated the techniques involved for doing this in a laboratory environment.

The important findings were that lateral movements and movement near to the line of sight were the most significant elements but all motion attracted the eye. The larger the object the more it was noticed as again referenced in John Williams' presentation and as we would expect elements that moved and were nearer to us were more likely to be seen and consequently the larger the object and the more it moved the more evident it was to the person viewing it. From these findings Postar were able to create their first set of calibration factors for dynamic images. The work is on-going but the next steps for Postar are to enlarge the sample, improve the technique, obtain more pedestrian detail especially as they are exposed to so many types of digital display. They want to separate more clearly the effects of the different media types i.e. scrolling versus digital and they are still searching for a way to understand busses and taxis.

James pointed out that there were other benefits arising out of the work done to date by Postar especially for media owners. Firstly that the inventory mapping system can be developed further to enable media owners to place proposed sites onto the system to calculate the likely audience flow based on the various parameters such as the size and direction. It will also help media owners to negotiate the value of a site with the landowners. The work to date also highlighted some other interesting demographics. For example that one fifth of women visit a mall once a week for 2,2 hours on average, young adults spend even more time at the mall but as expected men don't.

James concluded by pointing out that Postar is 79% funded by four media owners which he did not feel was necessarily fair and to highlight the point stated that in Britain three of the Out-Of-Home media owners contribute more than all of the media agencies put together. The consequence is that the media agencies do not get as involved as they might in Postar's direction. There will also be a big gap in the Postar funding if any of the big media owners fell out. He suggested an alternative funding model should perhaps be found and suggests either an equal split of funding between media owners and media agencies or alternatively a transaction fee on all Out-Of-Home adspend.

We were extremely fortunate to have **Alexander Epin the President of 062-Reclama Transit Media Agency** from St Petersburg, Russia with us in Milan. Alexander was the co-founder of his business which was one of the first private advertising businesses that emerged in the post-Soviet era with a fleet of over 4200 busses in over 150 cities across the Russian Federation. How pleasing it was to have the Russian industry so actively involved with FEPE.

Alexander gave us a quick glimpse of the total all media Russian ad market which had grown from US\$800 million in 2000 to US\$9 billion in 2011. Television is again the elephant in the room with US\$4.4 billion spent on television in 2011 which is almost 50% of the market and has shown an 18% increase from 2010. Outdoor however enjoys a healthy US\$1.2 billion spend and has shown 15% growth over 2010. Interestingly the internet only just beats outdoor at US\$1.4 billion whilst print is also neck-and-neck with the latter two at US\$1.3 billion and showing much slower growth than outdoor at 6%. Radio remains behind the rest of the pack at US\$400 million ad spend over the last year but with a similar growth rate on 2010 as outdoor.

The internet has on average 50% coverage of the Russian population with as expected, the highest penetration in Moscow at 68% and St Petersburg at a leading 71%.

Of late the outdoor industry has gone through rapid change in Russia with the long overdue culling of outdoor clutter in the major cities and the removal of large static formats inappropriately placed near environmentally sensitive buildings, one of which was purported to be the largest advertising site in Europe. Yet the amount of public transport grows along with the population and as people become more affluent. Thus fortune has smiled on the transit medium which still remains ubiquitous with extensive coverage of the major cities and of course as the industry would argue, services a mobile and younger market both travelling or out on the street who clearly would have money to spend.

People are also spending more time out of home in Russia which would be a similar phenomenon to broader Europe with a significant increase in time spent out and about between 6:00am in the morning and midnight, since the 1990's. Favouring the outdoor medium is the fact that according to the "J'son and Partners for Google" study in 2011 they established that 23% of mobile purchases were made whilst people were out and about and able to react to Out-Of-Home advertising messages.

Alexander ran us through some of the innovative opportunities now available in bus advertising in Russia and also introduced some of the interactive poster panels like an innovative execution for Axe deodorant which involved talking angels once activated on a touch screen by a pedestrian viewing the display. Out-Of-Home remains the cheapest form of advertising in Russia at US\$ 8 cents per thousand versus television at US\$7.00, radio at US\$2.30, newspapers at US\$4.80, magazines at US\$5.00 and internet at US\$3.90.

We were honoured to have the second day of our conference opened by **Francesco Villa** as past President of FEPE and **President of Honour** for the Milan conference.

**William Eccleshare the Chief Executive of Clear Channel Outdoor Holdings**, enthralled us with his presentation on the power of creativity. William reminded us that Outdoor was the original advertising medium dating back to paintings on cave walls to the monolithic obelisks of the Egyptian period. He noted that he was quoted in the press as referring to the change in outdoor only having happened over the past few years given that the medium has for over a century remained largely a paste and paper medium. He reminded us that outdoor advertising signs were used back in medieval times to denote the location of various business or services from the apothecary to the brewer, all with a standard emblem portrayed outside their place of business which would apply to all purveyors of a similar service. These emblems or coats of arms have evolved into the on-premise signage that we know today.

Some of the visuals that William used to demonstrate the evolution of the medium through the early Coke posters, the Henri de Toulouse-Lautrec Moulin Rouge advertisements, the famous Unilever Pears Soap ads, Bovril and Bisto, posters of the pre Second World War era and of course "Guinness is good for you," remain the creative legend upon which today's outdoor industry grew up on. William also spoke of his role in the Kit Kat ploughed field advertisement. How the "Labour isn't working" posters probably brought Margaret Thatcher into power and more up to date the famous Economist series which again remain milestones in poster history. The Eva Herzigová

advertisement for Wonder Bra voted the best outdoor poster of the last decade remains etched in all male minds and changed many women's lives and the surrealistic Benson and Hedges advertisements that for a while cleverly out manoeuvred the no brand name tobacco legislation in the UK also remain interesting reminders of our past.

William stated that the power of images is what we do best and that the poster still remains the greatest discipline for a creative team. The discipline of concisely portraying a concept in a limited number of words with one graphic image. I am reminded of Trevor Beattie the creator of the Wonder Bra ads and the famous Pretty Polly campaign who stated that as Creative Director his role in the creative team "was to take away, not to add" in other words to portray the creative concept in as few words and images as possible.

Referring to current creative quality in the outdoor industry, William was of the view that our greatest creative days in outdoor are behind us but need to be revived and hugely memorable outdoor campaigns are not been created to the same unforgettable degree as in past years. As a consequence our approach to digital outdoor must be more imaginative. He said "Technology will not solve everything, we need to find ways to creatively use the new technology" again referring to Matthew Dearden's quote, William echoed his sentiments that "Digital is a premium product because you can do different more exciting creative, but if all we do is go from paper to pixel and nothing else changes, digital will never pay out."

In referring to the internet, William pointed out one of the flaws of much online advertising is that it features purely transactional ads usually offering some sort of discount incentive. However the creativity is usually very poor and does nothing to build brand equity. He further noted that Apple had become Clear Channel UK's biggest advertiser and that he was pleased to see Google making such good use of billboard advertising in the United Kingdom with the phonetics campaign to promote Google's Voice Search for Mobile. William went on to present a number of examples of where digital outdoor had been used for static poster creative and then compared that with other examples where full use had been made of the technological capability of the digital displays to create elements of movement, attraction and excitement in the digital posters clearly illustrating the power of proper use of digital outdoor and the difference in impact of good creative execution.

A further thought surrounded Clear Channel bringing in young expert digital creative teams to work on digital creative. Clear Channel have sponsored the Cannes Outdoor Lions Award to further promote creativity in outdoor. William further reviewed some of the new technology being used in outdoor from QR codes as used in the Tesco HomePlus South Korea example to the comedian trapped inside the electronic poster panel. He further demonstrated the ASICS campaign in the New York subway which invited commuters to run against a marathon athlete over the length of a 20 metre digital screen. The final areas for focus left for us to reflect on by William were firstly creative richness where we should capture attention, tell stories and trigger emotions with bespoke content capabilities including animation and full motion video. Secondly he advocated engagement to start a conversation and interact with consumers through links with mobile / online content and transactional capability using smart phone technology. Relevance was critical and encouraged, bespoke and multiple messages tailored by context including time, day, location and proximity. And finally, immediacy whereby we should enhance creative content with dynamic messaging and live updates on news, weather or travel and have links with social media and accommodate or promote environmentally triggered changes in other words selling the right product for the right environment or perhaps even the right weather conditions. William concluded with a review of the powerful launch of the new Madonna "Give me all your luvin" single with its extensive use of Out-Of-Home.

It was wonderful to have **Nancy Fletcher, President and CEO of the Outdoor (now OOH) Advertising Association of America** with us at the FEPE Milan conference. Certainly Nancy's presence reflected the co-operation between FEPE and the Out-Of-Home industry in the USA and our mutual desire to promote market share of the Out-Of-Home medium across the world. Certainly the learning's from Nancy in this regard were outstanding whereby she informed the Congress that the United States Out-Of-Home advertising industry had re-invented itself in a whole new

positioning of the industry in the context of American media and rebranded to reflect the changing environment in which it now finds itself.

In arriving at a decision to reinvent and reinvigorate their industry the OAAA in America took a long hard look at market share data across the world as produced by Zenith Optimedia and presented by Nancy. At the top of the scale China Out-Of-Home enjoys almost 16% share of total advertising spend in that country, Russia follows closely behind with approximately 15% share, whilst in Europe France enjoys a significant 13.4% market share. Towards the bottom of the scale we see the United Kingdom with 6% market share and the USA at 4%. Clearly there was room for improvement in the USA. Further in looking at global advertising share TV led the pack at about 40% of total global adspend and was on a gentle upward trend. Newspapers which had enjoyed about 32% market share globally in 1999 was in terminal decline en route to 16% market share worldwide by 2014. The internet was charging ahead with virtually no share in 1999 to over 20% globally by 2014 while Outdoor has tended to muddle along across a similar period at just over 5% market share to probably about 6% now. The glaring fact facing the OAAA in the US was that in 2011 Out-Of-Home spend was US\$6.4 billion and that every point of market share growth was worth US\$1.6 billion, certainly an incentive to invigorate the US Out-Of-Home industry. The difficulty was to get an industry of competitors to unite to accelerate this industry wide growth but the financial reward seems to have galvanised the industry to the task.

A committee of US industry luminaries was brought together, all in the best interests of the Out-Of-Home industry. From the summer of 2011 some industry research and analytics were conducted with a view to repositioning and re-branding the Out-Of-Home medium. Positioning options were developed and testing of those options conducted before the development of a new brand culminating in the brand launch on May 1<sup>st</sup> 2012 and then the implementation and of course alignment of the industry, all done with the support of VAI Partners and Consumer Dynamics. A goal was set to grow Out-Of-Home market share in the USA from 4% to 6%.

As part of the exercise set research objectives to understand industry perceptions of Out-Of-Home was established to understand its strength, weaknesses, opportunities and threats (SWOT analysis). The research also sought to understand the role of Out-Of-Home in the media mix and to create a new brand with new attributes, positioning and brand messaging. The research was conducted extensively with advertising agencies, advertisers, outdoor media operators and specialist buyers and planners. The research results were interesting where Out-Of-Home was considered to be a strong medium which was tactical but secondary and more below the line than other media. It was a traditional medium, slow moving, less professional and less strategic than its peers. The research also found that the term "Out-Of-Home" when referring to the industry was preferred to "Outdoor Advertising." Outdoor Advertising been seen to be more traditional, mass reach, kind of boring, insular and limited versus the term Out-Of-Home advertising which was considered more contemporary and innovative, more targeted and customised, cool, creative and tech savvy and consequently younger and more forward thinking and inclusive. The industry had to move from being location driven to audience driven to drop its purely tactical image to that of a more strategic and complimentary medium. It was necessary to make Out-Of-Home easier to use, plan and buy and make it more accountable and of course more forward looking, innovative with high creative impact and a good looking quality structure appearance which reflected the image of the brand or service advertised.

In responding to the challenges on the repositioning front the OAAA have rebranded themselves as "Out-Of-Home Advertising" using an OOH icon as part of the complete logo.

With regard to innovation they are encouraging more creative thinking, more use of high impact creative executions, encouraging new technologies which also encompass interactivity. Their members will capitalise on the ubiquity of the medium and its impactful formats and become more eco-friendly through improved materials and energy efficient and quality lighting. The industry wishes to improve business practices, appear more professional and consultative in their selling. They will also promote the new TAB Out-Of-Home ratings.

The ubiquity of the medium will be promoted and the fact that it surrounds and immerses hard to reach consumers, in short going where other media can't. It was recognised that the medium has unlimited creative potential which

was to be encouraged as was more high impact, disruptive and engaging messages. The OAAA have introduced the tagline "Take Another Look" so the complete logo runs as "Out-Of-Home Advertising", the OOH icon and the "Take Another Look" tagline which will be promoted nationwide of course on the outdoor medium, on all stationery through PR releases, some print advertising and the internet.

It will be interesting to invite Nancy back to FEPE at a future conference to understand the consequence and results of the re-positioning and new branding exercise. As Nancy quoted Tom Peters "If a window of opportunity appears, don't pull down the shade".

Nancy was a hugely informative and welcome guest at FEPE Milan 2012 and left us with a reminder that the OOH National Convention will be held in Los Angeles from May 19 – 21 2013.

Flight BA 63 suddenly dropped about 500 feet sending my notes onto the lap of the passenger next to me. Clearly we were approaching Entebbe Airport amazingly located right on the shores of Lake Victoria, the source of the Nile and straddling the equator. A huge low pressure area creates regular wind turbulence especially drawing in the trade winds from the north and the south. What a place to locate an airport, I guess always a roller coaster ride in Africa. Perhaps the force of the trade winds somewhat reflected the gusto with which **François de Gaspé Beaubien** burst onto stage into Milan and then in a hugely informative presentation presented the Future of the Out of Home Medium and the realities we are facing over the next five years, as he weaved his way amongst the audience disseminating his evangelistic message.

François de Gaspé Beaubien is Chairman and as he puts it "Chief Coaching Officer" of Zoom Media. He set the scene with a reminder of the '50's when television was the primary in-home medium with one or two channels, commanding its prominent position in every living room almost as a beloved member of the family. Expounding the virtues of products and services as it did as a very obedient family audience sat captivated and entranced by the magic of this wonderful new delivery platform.

Today our audiences are less obedient and irreverent and don't like to be talked down to. They want a two way conversation and will shut your message out if it offers no reward. Television although powerful is no longer the living room god to which the audience is prepared to pay homage and accept its message unquestioningly. Media fragmentation and media choice have allowed the consumer to decide when and where to consume media. And with PVR they will shut out the television advertising messages if considered irrelevant. Whilst media fragmentation does have a positive side in targeting individual interest groups more directly thus allowing advertisers to engage them more efficiently it does place more pressure on the media agencies to choose the most effective media channel and decide the best way to activate interest for the brand or service within those channels.

Of course media agencies have to also choose the best complimentary mix of channels which of course are not restricted to television but the plethora of media opportunities that exist in and out of home. With the explosion of the internet and the social media it brings, now coupled with the new mobile media opportunities, the agencies task becomes even more complex and begs the question raised by Annie Rickard in her submission "are media agencies being adequately compensated for the additional complex media planning and media buying work they are expected to perform on behalf of their clients?"

François provided some interesting research conducted by Zoom Media in health clubs which discovered that 51% of their members have digital video recorders in their homes thus a significant percentage of their viewing particularly with regard to advertising is controlled by the consumer. As François said "In the age of chaos, the power belongs to the consumer" and the consumer will choose (by use of PVR's such as Tivo) to be very selective in their viewing eliminating the advertising and choosing programme content only or services such as Netflix to access latest movies. No wonder Blockbuster the leading video rental company apparently now trades under chapter 11 restrictions. So in François's view in-home media are seriously challenged and a "War of the Titans" inside the home for people's

attention between the likes of Google, Netflix, Apple, Hulu and now Apple's new "VCR for Internet" rages on. Whilst the video game console provides yet another in-home distraction.

Of course the other in-home favourite in regard to the media world used to be the newspaper but again the electronic age consumes that opportunity. With the advent of the tablet more and more people are reading print media on an iPad or other tablet products. According to a Pew Research Centre Study in the United States 29% of adults own tablets or e-readers, up from 2% less than three years ago. The iPod changed the radio industry according to François with sales of iPod's exceeding 1 million products over two years and consequently raining on radio's parade. Sales of iPhone over a similar period were 20 million units and the iPad 65 million units, so rapidly reducing the demand for news in the printed format and allowing people to engage with electronic content very selectively.

Further, on the electronic revolution François reminded us of the impact that applications or Apps will now have as an access point to information. At the beginning of 2008 there were no applications. In January 2011, 15 billion Apps were downloaded by users of electronic devices. In March 2012, 25 billion were downloaded. The growth is rapid and exponential and offers a new revenue generating opportunity for the likes of Apple. 70% of the Apps downloaded from the Apple App Store are free whilst 30% of those downloaded offer a paid-for-service. The Apple iTunes service is driving 46 million downloads per day. And let's not forget Twitter now driving 340 billion tweets per day. Despite this rapid ramp up of internet and mobile services which has driven demand for smart phone devices user adoption still has huge upside with only 953 million smart phone subscriptions globally versus 6.1 billion standard mobile phone subscriptions. But the future may belong to Android with 250 million Android devices shipped versus about 60 million iPhone units after three years of the launch of each product according to Morgan Stanley.

Interestingly future internet user ship will be driven by the emerging markets. The penetration of the more advanced countries is relatively high at 79% in the US versus 38% in China and only 10% in India thus offering huge growth opportunities in the latter markets. Mobile phone penetration also offers some interesting statistics with 3G penetration in the US at 64%, Japan at 95%, Korea at 85% and the UK at 53% whilst countries such as China are at only 6% penetration and India at 4%. Also interesting is the growing importance of mobile devices for access to the internet with mobile access in India now surpassing that of desktop internet usage for the first time in April of 2012 in India. The internet in the United States has now overtaken newspapers in terms of its ad revenues.

Referring specifically to social media François revealed that Facebook now had 970 million users up 21% from 2011 and astounded us with the fact that it took radio thirty eight years to achieve 50 million listeners, television thirteen years to achieve 50 million viewers, the internet four years, the iPod three years and Facebook only two years to enjoy 50 million users. I assume the audience numbers for radio and TV to be US audiences and numbers for Apple, Facebook and the internet to be global although emanating from the US. There are 3 billion searches done on Google everyday whilst the internet has an unlimited number of pages prompting Bill Todd the General Manager of Value Click Media to comment that "there is simply a glut of internet inventory today making it a challenge to find what you're actually looking for". This coupled with the fact that Americans view more than 40 billion videos online each month one can understand François' point that there is an avalanche of information bombarding the consumer every day largely inside of the home. Perhaps it is understandable therefore that in Chris Anderson's book "The Long Tail" he talks about the downfall of the daily newspaper where circulation of daily newspapers in the US has fallen from 62 million per week in 1990 to just over 54 million in 2004 and declining exponentially with the average age of readers at 54 years old. François talks about the decade 2000 to 2010 as the decade that killed the newspaper with the majority of Americans believing in the disappearance of newspapers altogether. To add to their woes classified revenues in the USA have dropped by 75% during that decade as reported by the Media Daily News on January 3<sup>rd</sup> 2011. Publicity in newspapers has reduced by half versus 2005 thus more companies are putting out publicity information through electronic media.

François had also made the case for television being less effective due to the massive fragmentation that has also been evident over the last decade and radio has faced the challenge of internet radio and of course MP3 players. 314 million iPods alone have been sold since their creation and according to Nielsen 54% of MP3 owners in the US plug their player into their car with 69% of American teenagers saying they use MP3's and computers as their primary source of music with only 16% of teenagers claiming to listen to the radio. Four American car makers have announced that they are installing internet radio into their cars and most manufactures are now providing for MP3 inputs.

François argued the case for outdoor where the future looks significantly better than that for its media rivals. Consumers are spending more time out of home, they are better connected to the internet from mobile devices and are transacting or searching for information more on the move. Interactive outdoor displays are also providing new opportunities for a deeper level of interaction with people on the move and inviting the opportunity to transact or interact. François encourages all outdoor owners to be tech savvy but not to be misled by using tech for tech's sake without a purpose, in order to understand the benefits of QR codes, Bluetooth, NFC and other interactive opportunities technology offers the outdoor company. Whilst we should be tech savvy being a little tech-agnostic also helps. François encourages us to embrace the Web and to understand how outdoor companies are allowing the opportunity to display their own messages on digital displays via the internet.

François predicts a lot of money ahead for the OOH industry. His full presentation will be posted on the FEPE website.

We were indeed fortunate to have **Mariusz Jan Demner the Managing Partner of Demner, Mericek & Bergmann** one of Austria's foremost creative authorities running an advertising agency which operates across 15 Countries of Europe and ranks number 1 in terms of billing and creative awards in Austria. He also serves as a Director of the International Advertising Association (IAA). Mariusz Jan presented an interesting concept under the title "How a big idea helps to boost the relevance of Outdoor Media," energetically bounding onto stage with a T-shirt with the word 'Win' emblazoned upon it. Certainly a not so subtle reminder of what we should all be trying to do. He proposed a project which incorporated three steps to winning for outdoor companies in: "Winning new clients." "Benefiting from the boosted relevance of outdoor media for fast moving consumer goods brands." and "Creating new business opportunities for outdoor advertising companies." The big idea to achieve this he proposed, would be to launch a unified Branded Goods campaign for the Branded Goods Associations of our respective countries similar to that which he had achieved for the Branded Goods Association in Austria, France, Germany, Hungary and Norway. To date his company has successfully run 32 branded goods campaigns in the respective countries. The purpose of the campaigns being to encourage consumers to only buy the real thing i.e. the branded product versus the no-name or white label impersonators or supermarket generic products.

Mariusz Jan went on to explain how the system works. Each brand gets its own ad but within a common creative framework and all the advertising is aired or displayed for the same period, usually 1 month per year. Over the years they have kept the core message and the slogan unchanged to hardwire the belief of the branded product into the consumers mind, however each year a new creative idea is developed but it remains true to the original theme. To encourage extensive participation by branded goods marketers special media prices are negotiated with media companies. But bearing in mind that this concept drives business that the industry might not normally have had media companies are more than willing to participate. Mariusz Jan presented a number of visuals of the campaigns that had been run across the various countries, all of which will be posted on the FEPE website and some of the executions are well worth noting. I particularly enjoyed the milk chocolate bar breaking through a blank white billboard face which is run over a series of posters and which now of course could be done in a sequence with digital displays. The breakthrough theme was used for a range of products from chocolate bars to Cornflakes to soap powders and was highly effective. A cross section of outdoor media was used in the campaign such as billboards, trams and posters in closed environments.

A further spin off for the campaign was that the Austrian National Television picked up on the story so the activity went viral. Average recall for billboards in Austria averages 24% according to Gama Plakatanalyse (Gama Billboard Analysis) in the February 2001 report. Aided recall or recognition is on average 36% in Austria according to the same report. Performance of the Branded Goods campaign run by Demner, Merlicek & Bergmann showed a 39% recall and 36% recognition score according to the same source.

The new 2012 campaign features “Trust in branded goods” as its main theme and the advertising adjusted accordingly to promote this message. The campaign is also being adapted to include new technologies such as QR codes on poster sites and elements of the campaign are now featured on the internet with a strong mobile phone element. It is interesting to note that research conducted since 1998 through to 2012 by Karmasin / Gallup Market Research indicates that people buying branded goods because of the brand campaign have increased from 12% to 55% in the campaign areas over the researched period. Small wonder that now 279 brands have participated in the campaign from the smallest to the largest brand manufacturers and particularly significant to us in the Out-Of Home industry is that brands can choose the media to be used in the Branded Goods Awareness campaign and the majority of the big brands have favoured outdoor media over other media channels by a large margin and as a consequence outdoor has enjoyed almost 90% of the media spend.

A short while ago Mariusz Jan attended the meeting of European Brand Goods Associations of Italy, France, Netherland, Norway, Denmark, Spain, Czech Republic, Great Britain, Sweden, Slovakia, Russia, Finland and Belgium, promoting and reporting on the Branded Goods Awareness campaign. He invites members of FEPE to contact him on [MD@dmb.at](mailto:MD@dmb.at) should any of the country Associations or individual contractors wish to pursue the concept in their territories. A wonderful open invitation to generate new revenue..... thank you Mariusz Jan.

We had the opportunity to really understand the psyche of a famous brand that had more than stood the test of time. **Marco Ponzano the CEO of Centro Studi Fratelli Branca** presented an interesting brand history of the brand Fratelli Branca. The Fratelli Branca distilleries S.R.L. is a well- established Italian company founded over 160 years ago in Milan operating in the spirit sector and currently represented in more than 160 countries. It has always been a family controlled business headed by the Branca family now in its 5<sup>th</sup> generation that began in 1845 when Bernardino Branca invented the original bitter liquor Fernet-Branca which became popular all over the world. The secret formula which contains 27 ingredients and herbs has remained a secret to the family since inception. The product has been deemed a cure for malaria in the past and remains a classic case study for family owned alcoholic beverages and is often studied by students at universities. The biggest challenge faced by the company in its marketing effort has been differentiating the brand from copycats. The Fratelli Branca posters feature their own classic style and have enjoyed a legendary reputation in the OOH industry across the decades. It was the first brand to ever be featured on a Ferrari, testimony to the prestige that surrounds the product.

To our delight **Steve Ridley the Global CEO of Kinetic Worldwide** joined us from the USA to give us his insights into the direction and future of the outdoor industry under a presentation entitled “What can I tell you in 30 minutes that you haven’t heard before?” Steve positioned his very informative and visually entertaining presentation relating the challenges and opportunities facing our industry to the seven deadly sins and seven heavenly virtues presented in his inimitable style. The audience enjoying his dry sense of humour commencing with him waving a coat hanger brought from his hotel room which when used to hang up his suit pants as a 6ft 2” male left the waist curled up on the floor of his wardrobe he proclaimed. An amusing introduction to his assault on the media market place by cautioning us that if it doesn’t have a purpose or it doesn’t work, don’t do it. He advised us to think broadly about the whole concept of what we are doing or proposing as opposed to just selling some media space. In other words to think about how we are adding value to the whole advertising, sales and marketing programme rather than just what is happening in our silo. We need to be more aware and broader in our thinking. He pointed out that technology will be great for us but we need to again understand what the purpose is and connect the digital activity

back to performance at the till. "It's not just about using digital for digital's sake" he explained. His two tits (birds) on a QR code amusingly illustrated the point.

Steve further cautioned that whilst there was much hype and excitement around internet trading 92% of US retail sales still went through bricks and mortar stores and only about 8% online. Further supporting his point of view he referred to the European arena wherein Continental Europe only 4% of sales are transacted online. Although he conceded the United Kingdom enjoys the highest percentage at 12% which I think is understandable given the most unpleasant experience of shopping on London's crowded streets and then trying to travel home with parcels on an antiquated and grossly overcrowded underground system which I would compare as about as enjoyable as "gargling wasps" (Barry's personal rant at 600ft).

Steve again put into perspective the importance of the various communications channels when he pointed out that the top four US grocery stores reach nearly 250 million consumers a week. Walmart on its own reaches 100 million people a week. The top four US TV programmes reach about 60 million a week and Google reaches about 40 million a week.

Steve also raised the question of the revenue sharing relationship from advertiser to landlord and encouraged a debate as to whether the proportions were appropriate given the contribution by each party, landlord, media owner, creative agency, media agency and client. Certainly a recurring theme which was also raised by Annie as to whether rewards were appropriate for work done in the whole value chain. Steve went onto say that the media industry is also being decoupled from the money the client is making which again is a call for us to investigate our charging. Does this call for a pay for performance model or a cost per click or per eyes on consideration? Certainly a provocative thought but visionary. Perhaps we are underselling our services and need to consider a model which provides us more participation in the end result.

Steve spoke about the need for one trade body in each country representing OOH players to avoid conflicts of interest or us inadvertently working against our own interests. Certainly with the growth of the new large global media owners emanating from social, internet and mobile it becomes more imperative to stand together. Steve pointed out that we are the human channel communicating with the man in the street, out on the street when stores are open and purchase decisions are been made. "Strip away the jargon and more than any other medium it presents a snapshot of the current state of human society" he said.

On the globalisation front Steve emphasized the importance of knowing the local market and the local media opportunities. By example he illustrated that a red bus on the streets of the UK is not necessarily the same as those in India. Advertisers do need specialised knowledge and information.

Further he illustrated the Tesco Korean example whereby commuters traveling on the underground system in Korea were able to order groceries from a poster site depicting packed supermarket shelves by scanning the QR code located under each product depicted on the shelves thus instantly ordering the product through mobile internet connection. Of course the door-to-door delivery system works well in Korea as it does in the United Kingdom thus facilitating this innovation, but again it is the media agency and media owner that need to understand these opportunities and to be in apposition to advise the clients and exploit the opportunity. As Steve puts it "We need to understand the total human experience then we can build the tools that realise the communication potential that sits beyond everybody's front door". He did however caution that the Tesco Korean online store was of short duration and we really need to develop products or services that can endure and remain practical rather than just promotional.

Returning to technology Steve conceded that it could be our biggest asset but we have to learn properly how it will assist us. He cautioned us that Facebook was a diary of past events but the Out-Of-Home medium is consumed in the here and now. He also put into context the amount of data being created in the world by comparing two planets in the sky the tiny earth versus the massive Jupiter. The earth representing the volume of data ever sent by mailed letters in the US versus the 2010 global data creation by electronic means of 1.200 Exabyte's the amount of data

now being generated. Clearly illustrating the need for more expertise in managing this data, understanding the new consumer and the value or not of new media channels presented.

As a side note I thought it ingenious of Kinetic to use the FEPE Milan Conference as an opportunity to hold their own Regional Meeting to coincide with the event at the same the hotel thus providing the opportunity for more of the Kinetic senior team to enjoy the benefits of the conference whilst allowing efficient use of management travelling time..... good thinking Steve.

**David Payne CEO of the Americas of Kinetic Worldwide** kindly hosted a half an hour panel of the Captains of Industry. Media owners representing some of the top global outdoor advertising companies. On the panel sat William Eccleshare CEO of Clear Channel Outdoor Holdings, Jeremy Male CEO UK, Northern Europe & Australia, Naren Patel CEO of Primesight UK and Antonio Alonso Outdoor International CEO of CBS.

Clearly we miscalculated by only allocating half an hour to this panel discussion as the probing questions by David Payne prompted a stimulating and lively debate which had the audience requesting more time which unfortunately was not available. Clearly we will have to extend the Captains of Industry debate in future years and hope that David will be able to Chair it so masterfully as he did on this occasion.



An extensive number of subjects were covered not least of which who would own who in the years ahead which resulted in some teasing and speculation of the outdoor landscape in the next five years.

Certainly one of the strong themes that arose from the discussion was that whilst so much of the conference attention had centred on digital and new media 86% of Clear Channels portfolio was not digital and therefore the focus of the company was to get that product sold. I guess something that would resonate with all outdoor media owners. Only 17% of JC Decaux' s UK sales are for digital product but the channel demands disproportionate allocation of time and resource. There was debate around the need to bring new talent and more professional people into the industry to ensure that we have the intellectual capital to compete with the new global media

platforms although one wag at coffee suggested that new blood simply represented displaced old blood from other industries. No doubt the debate will enjoy much more air time and each company will have their own view, but certainly in terms of new media direction the industry does need people of other media / industry experience and ideas and will no doubt employ accordingly. Certainly I would think it essential to get the right balance between experience of our businesses and new thinking about new media platforms if we are going to “improve the herd,” build better companies whilst also growing market share.

**Naren Patel, CEO of Primesight** presented to us the gateway to mobile content starting off with the four key steps to change. Naren pointed out that smart phone sales are to surpass 1 billion units in 2015, a massive increase considering that in 2010 smart phones had achieved sales of 300 million units. “Of course with the shift to smart phones the average person who is now spending more time out of home is more connected and able to connect with the web for information or to transact more than ever out of home when they are exposed to Out-Of-Home advertising” he said. Naren advocated that outdoor drives search and is in fact the best medium for driving search by mobile device as proven by the Customer Journey Research conducted by the Outdoor Media Centre which found that search by mobile device generated by the various media in the United Kingdom during the period of their study was driven 14% from outdoor advertising, 12% from online advertisements, 11% from press, 11% from word-of-mouth and 8% from television. This becomes relevant considering that revenue from mobile search is forecast to grow from 7% to 26% of revenue at Google by 2015 according to Cowen and Co.

Further the Outdoor Media Centre indicates that two thirds of people in the United Kingdom have searched the web on all devices as a direct result of Out-Of-Home advertising, 58% of those from the work or home environment and 16% on smart phones or tablets which of course could also take place from inside the home.

Naren further illustrated his point by a summary of the Boohoo.com campaign results, Boohoo being an online women’s fashion store. He spoke about moving from driving search which was working well for Out-Of-Home to now driving interaction by the use of new technologies such as QR Codes and Nearfield technology. By illustration Naren introduced the Battlefield 3 video game launch whereby the area around Waterloo Station was dominated by Battlefield 3 posters on Primesight billboards. A somewhat appropriate location given that the original French Waterloo was the site of one of history’s greatest conflicts. Coupled with the posters was extensive use of QR codes and Nearfield communication whereby viewers of the poster were able to download interactive content from the poster locations. Unprecedented PR resulted from the campaign and huge Twitter traffic, in total 4005 unique content downloads were interacted.

Naren urged the Outdoor industry to adopt the new technology and to collaborate on how the industry can make best use of the future direction of the technological opportunities open to our companies. In his view technology development is leading the industry while mobile manufacturers are adopting the technology and making it available on their platforms. Product marketers are currently testing or toying with the new innovations while customer demand from the man on the street at this time is relatively minimal. In Naren’s view the consumer need further education on nearfield communication and QR codes. We also need to consider as an industry how we sell or price the clicks per poster in combination with the branding value of the advertising. We need to understand what sort of creative will lead to more search and why, when and where consumers search and for what products and services. He strongly emphasized that we must own the nearfield communication tags fitted to our structures so that we could own the data emanating therefrom. We all need to invest more and trial more with advertisers. We as an industry certainly need to collaborate on the new technology and capitalise on the opportunity it presents. Technology is not to be feared by the Out-Of-Home industry but grasped as an enhancement to our medium.

The acclaimed global advertising and media research architect **Tony Jarvis of Olympic Media Consultancy** in New York joined us. Being an Olympic year it was most appropriate to have an Olympian in the house, Tony having swum in the Olympics for Britain but I won’t mention how many years ago, but as a clue he had to wear a full length suit. Tony has enjoyed extensive international experience both on the agency, media owner and client side having

enjoyed primary roles with P&G, GlaxoSmithKline, Diageo and Clear Channel and remains one of America's leading advocates of data fusion and optimizers, having considerable experience developing marketing databases and systems. Tony also served on the steering Board and technical committee of the ESOMAR global guidelines for OOH audience media research.

Tony commenced by warning us that having no metrics under-sells the great creative ad or campaign. He proposed more measurement of OOH and particularly measurement of digital Out-Of-Home and controversially suggested that the current ad-hoc audience measurement approach (DVPB) is inadequate. He quoted Nigel Morris CEO of AEGIS Media as saying "There is a lack of standards in data and measurement." Tony acknowledged the work done by Postar in the United Kingdom in establishing OOH audiences and the future work that is being done to incorporate transit and other outdoor media forms into the same study to be measure alongside roadside. Postar also includes likelihood to see measurement which is been further developed and consequently the new Postar study will remain a forerunner in the industry.

Tony also acknowledged the work of Andrea Mezzasalma in his days at Eurisko which has become GFK Eurisko which owned Audi Outdoor who were pioneers in the development in the use of GPS audience measurement in OOH.

Tony outlined the work done by ESOMAR in developing global guidelines for OOH audience measurement which was released in May 2009, after unique international collaboration in which he played a significant role. The guidelines were a successful attempt to standardise Out-Of-Home measurement globally which included agreement on common definitions, methodologies and standards so that international marketers and advertising agencies are able to enjoy standard methodologies and definitions for outdoor audience measurement across all countries thereby making OOH research more understandable and inter-country comparable.

The global guidelines have also assisted with inter-media comparison in different parts of the world. Tony advised us that OOH audience measurement studies exist in Northern and Southern Ireland, the UK, Spain, Switzerland, Germany, Belgium, Netherlands, Norway, Sweden, Denmark and Finland whilst outside of Europe studies exist in the USA, Mexico, South Africa, Australia, UAE, China and Hong Kong. Further studies are in progress in seven other Eastern European countries.

Tony said the next steps for innovation and audience measurement research are for the OOH industry to embrace advanced technologies and transfer concepts from TV who are measuring the relative emotional impact of in-cinema advertising relative to TV or what he calls the 'presenter effect', the methodology of which he explained in some detail.

Tony then presented a number of case studies illustrating the uplift from emotional engagement all of which will be posted on the FEPE website. Tony highlighted the fact that digital OOH global revenue growth was significant. Having risen 15.3% in 2011 to US\$6.97 billion globally and projected to grow another 19.2% to US\$8.3 billion in 2012. The breakdown was USA US\$2.05 billion, China US\$1.44 billion, Japan US\$749 million, Thailand 50% of all outdoor, Brazil 33% of all OOH representing US\$155 million and the UK US\$549 million representing about 11.3% of total outdoor spend in 2011. Which Annie updates as 14% now in 2012. Tony quotes PQ Media in May of 2012 as a source. Despite this exponential growth in digital revenues he argues that audience measurement of digital OOH is virtually non-existent globally and in the US it is woeful.

Tony argues that advertisers and agencies perceive outdoor as "a jewel in the campaign crown" but only within a multimedia campaign not as a stand-alone. The medium must move from a 'nice to have' to a 'must have'. OOH metrics must provide a basis for intra and inter media analysis and 360 degree channel planning and must support reach and frequency optimisation for all OOH formats. Tony argues that to support digital OOH we need more granular campaign reporting and more sophisticated measurement and systems based on independent, transparent, certified / audited, accredited, harmonised ad exposure based, audience ratings to address GRP's, CPM's , reach and frequency and return on investment. He says we should sell digital OOH like television but we mustn't measure it like television. Hopefully new Postar will address many of Tony's measurement issues including digital and scrolling

media. As far as “independent, transparent, certified, audited and accredited” ad exposure is concerned hopefully the media auditor will step into the breach to find solutions and give advertiser comfort in this regard.

Alternatively Tony proposes version 2 of the ESOMA Guidelines which will embrace digital, video, place based, transit and other needs urgently and he advocates another international co-operative effort. Tony presented us green paper DVP.B entitled “Time to take ownership” proposing the steps to delivering significantly higher quality metrics to the industry. He then proposes a white paper be produced based on extensive global industry collaboration across all sectors to be expanded to all digital OOH media via joint industry committees worldwide. The green paper and white paper concepts I understand as a British Government concept whereby a green paper suggests proposal stage and the white paper accepted as final.

Tony proposed that agencies and specialists need to increase their involvement to ensure synergy with media analysis tools. “The industry needs to embrace new media technologies and TV research innovations, we need to provide granular ad campaign metrics and drive version 2 of the ESOMAR global OOH audience measurement guidelines,” he maintains. Tony proposes we support the US green paper and extend the proposition globally to all digital OOH formats internationally.

I guess that FEPE and of course the individual country OOH Associations will consider the proposition.

**Antonio Vincenti the Founder and CEO of Picasso** a leading outdoor advertising company in the Levant and North Africa with its headquarters in Beirut, Lebanon and operating in addition in Iraq, Jordan and Algeria has contributed significantly to the professionalism and growth of the outdoor industry in the whole MENA region. He is a very active Vice President of FEPE and hosted the Beirut FEPE Conference in 2010. Antonio is also President of a syndicate of outdoor advertising companies in Lebanon.

Antonio shared with us the event surrounding the 25<sup>th</sup> Anniversary of Picasso with a host of events including a special corporate identity recognising the 25 years in business. The company produced a 25 year book, launched the Picasso D’Or Trophy to the advertising industry, and revealed a digital campaign in Beirut featuring advertisers from across the 25 years. Events that involved the whole Lebanese community included a number of street celebrations featuring one of Lebanon’s most famous dance troupes touring the country with a mobile stage and sound capability. The event culminated in a large off-street banquet. A catalogue depicted street life in Lebanon which of course tied in to the outdoor advertising environment developed by Picasso and illustrated by renowned Lebanese designer Rana Salam. The Picasso D’Or Trophy in the guise of a Grand Prix prize and Silver and Bronze editions were presented to the industry at a glittering gala dinner. The trophy itself was an interpretation of the Picasso working man in an era of speed or fastness and reflected in a virtual world as created by designer Karen Chekerjian.

The 25 year book that was produced depicted the early history of the company, its expansion and development, the challenges it faced over 25 years and its technological development of new media across the period to the modern day LED Digital, and scrollers, now roadside and in closed environments such as shopping malls. The book charts the expansion of the company outside of the borders of Lebanon into Iraq, Jordan and Algeria. The book also details a noteworthy extensive social awareness programme. The original company pay off line “Yellow and everywhere” and bold corporate livery has also contributed to the strong recognition of Picasso over the 25 years. A significant press PR campaign was launched supported by outdoor advertising which promoted Picasso and the street events featuring the famous touring Lebanese dance troupe. Events took place in shopping malls and other environments across the country culminating in a huge off-street party outside of which billboards thanked attendees for their attendance and inviting them to participate with Picasso for the next 25 years. In all tremendous self-promotion which remains an example that other outdoor companies can follow.

We also hold two **Supplier Sessions** where presenters from Ayuda, Barco, Caire, GDS, Infinitus, Key Systems, Litetronix and Noval presented a 5 minute slot each on the virtues of their product range and most particularly on the new product they were bringing to market. All of these suppliers and FEPE's platinum sponsor Prismaflex exhibited at the conference in the support of FEPE and outdoor industry at large. I do hope that you all made time to visit their stands otherwise you should be in fear that your competitor did and might now have some new technology to gain advantage over you. Again I do wish to thank the exhibitors for their support and the investment that they make in moving outdoor forward and helping us compete with the new pretenders in an extremely competitive world.

I guess I should now provide a health warning and apologise to all of you that I have misunderstood, misquoted and dumbed down on your brilliant presentations. However I have made an honest attempt to reflect highlights from the content of our two days and provide you with a defence that this is my interpretation of what you said not what you actually said, so blame me. Presentations will be posted on the FEPE website during the first week of July.

Flight BA 63 was now touching down at Entebbe Airport, the screech of the tyres heralding the fact that writing was now impossible and a rather insistent lady was chastising me for not having my tray table folded away. I thought of how the Israeli Commando's must have felt when they landed on the same airstrip many years ago to release the hostages held in an EL AL aircraft on that same tarmac and reflected on how lucky they were to have been to have rescued everybody. As the plane taxied in I was fascinated again as I always am by the giant Marabou Storks that sat on the security fencing, tragically lingering on from the Idi Amin days when human flesh was so readily available in the streets of Kampala. But that was a time gone by, it was time to reflect on the new and exciting Uganda and the high margin outdoor advertising opportunities that lay within and beyond the air terminal boundary. And of course to think about a different and informative time that waits for us in Berlin in 2013.....

I hope to see you all there!

**Barry Sayer**

President

FEPE International