Date May 25-28, 2011 | **Where** Hotel Intercontinental – Madrid, Spain
Presented to FEPE International | **Presented by** Gerry Thorley, CEO – EYE Group

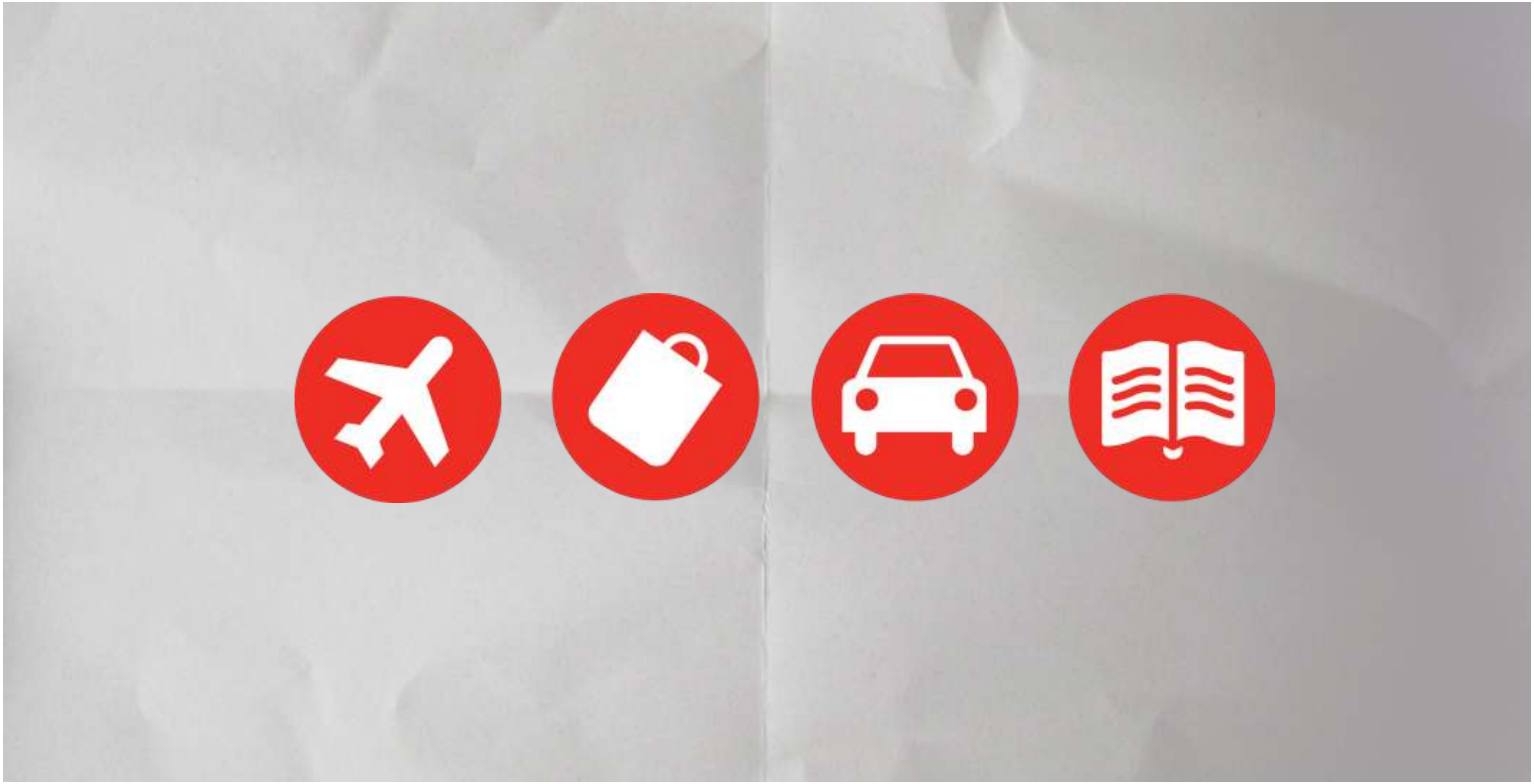
Madrid 2011 FEPE International | eye

Where we come from

eye™

EYE is a wholly owned subsidiary of Ten Network Holdings Limited, a publicly listed Australian media company.

Who we are



EYE is a specialist OOH media operator comprising four products.

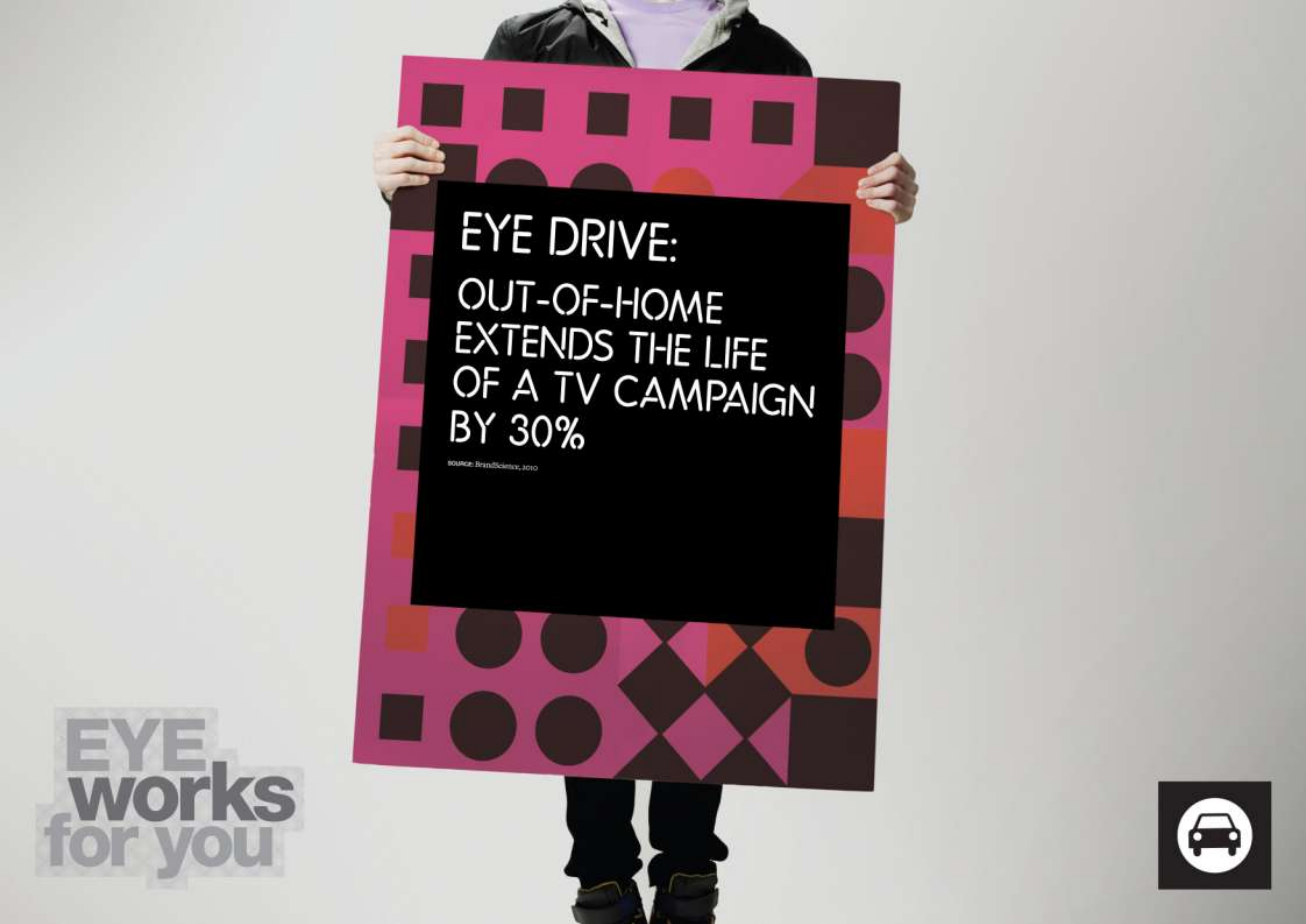

EYE FLY:
77% OF FLYERS AGREE DIGITAL ADS IN AIRPORTS COULD INFLUENCE THEM TO TAKE ACTION
SOURCE: Toluna, Eye Fly Digital Study, January 2011
EYE works for you

Internal and external airport media *(Australia, NZ, UK)*

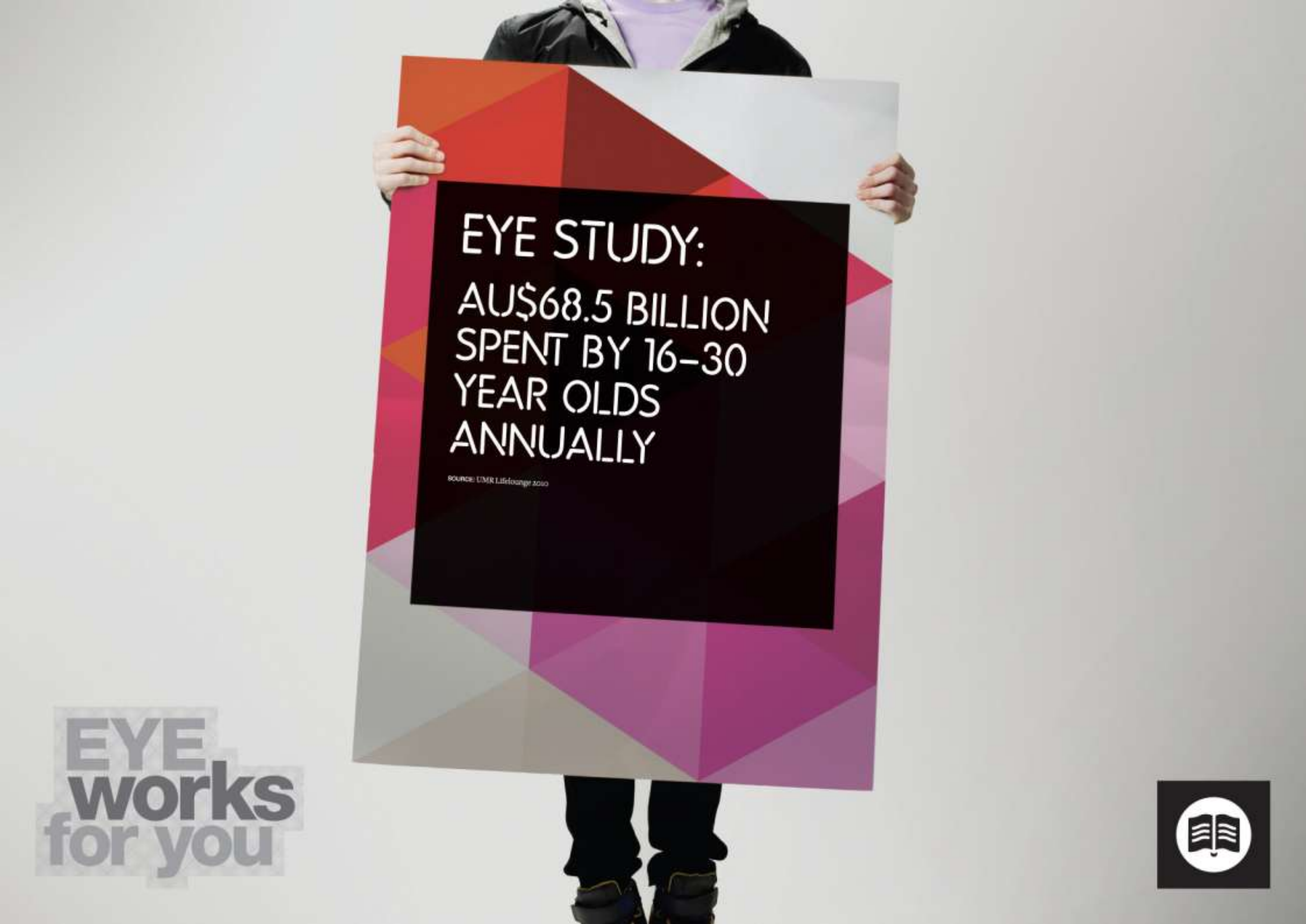

EYE SHOP:
EYE NOW KNOWS SHOPPERS EVEN BETTER THAN BEFORE WITH NEURO IMAGING AND EYE TRACKING
FOR MORE INFORMATION VISIT: eyecorp.com or contact Cassandra Thomas-Smith, Global Insights Director, EYE, cassandrathomassmith@eyecorp.com
EYE works for you

Shopping mall media *(Australia, NZ, USA)*

eyeSHOP


EYE DRIVE:
OUT-OF-HOME
EXTENDS THE LIFE
OF A TV CAMPAIGN
BY 30%
EYE
works
for you

Large format billboards *(Australia, Indonesia)*


EYE STUDY:
AU$68.5 BILLION SPENT BY 16-30 YEAR OLDS ANNUALLY
SOURCE: UMR Lifelounge 2010
EYE works for you

Higher education institution media *(Australia, NZ)*

eyeSTUDY


UK
London
Manchester
Belfast
USA
New York
Austin
Los Angeles
Indonesia
Jakarta
New Zealand
Auckland
Australia
Sydney
Melbourne
Brisbane
Adelaide
Perth

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EYE – Key exports

Eye Shop

- 420 Malls,13,000 faces – across 3 countries *(Australia, NZ, USA)*
- 300m Shoppers per month in EYE malls
- $20b retail sales per month in EYE malls

Eye Fly

- 21 Airports, 2,979 faces – across 3 countries *(Australia, NZ, UK)*
- 35 terminals comprise the EYE aviation platform
- 188.5m PAX per year in EYE airports

The future of Out-of-Home

Platform quality & consistency

Audience relevance

Proof of offer

Sector cohesion & advocacy

For EYE the future is now!

Digital @ EYE

- Displays – More evolution than revolution
- Mobile devices – Product extension or new opportunity?

Accountability that really adds value

- Audience Measurement
- Eye Tracking
- Neuro Imaging

Digital

Existing legacy network	➡ Evolution essential
Late scrolling	➡ Potential to quantum leap
Keen to differentiate & lead	➡ Limited competitors
Mostly indoor environments	➡ Clean & controlled lighting
Key locations play to limited scale	➡ Opportunity to experiment
Broadcast heritage	➡ Tech savvy

Digital

2004 Eye Fly Business First, 8 units

2011 600 units across 4 countries via Fly, Shop & Study
Eye Fly – 20 terminals; 10 cities; 3 countries
Eye Shop – 64 malls; 13 cities; 3 countries
Eye Study – 47 campuses; 19 cities; 2 countries

2004

2011

Digital

High value locations

Swap (not add) locations

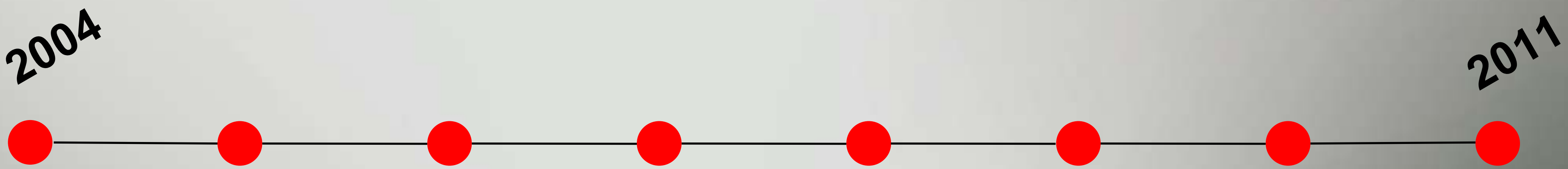
Resolution quality and display size was imperative

Network leverage and standardisation

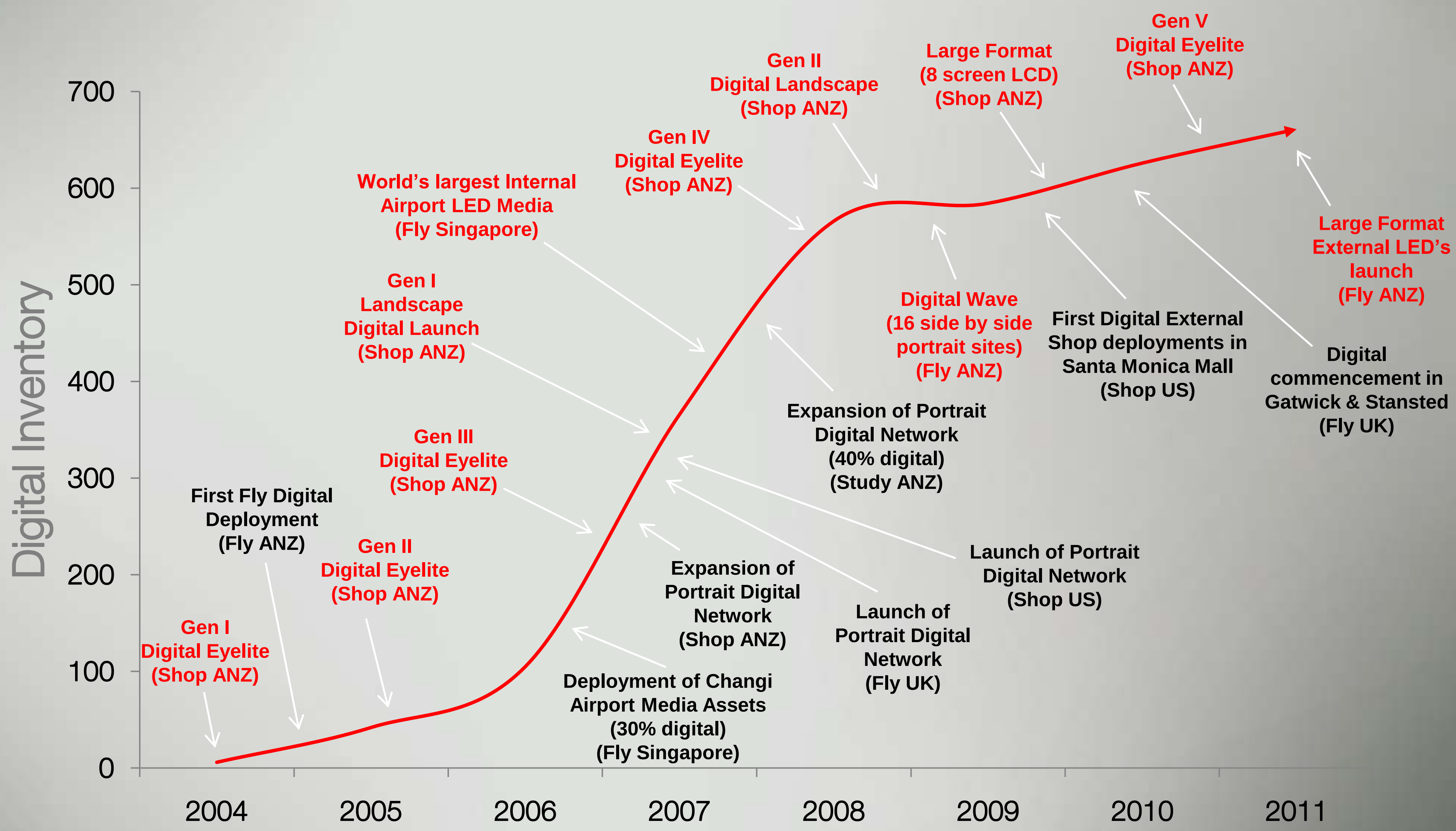
Plasma; LCD; LED – Not becoming captive to technology

Not TV

600 units across 4 countries via Fly, Shop and Study



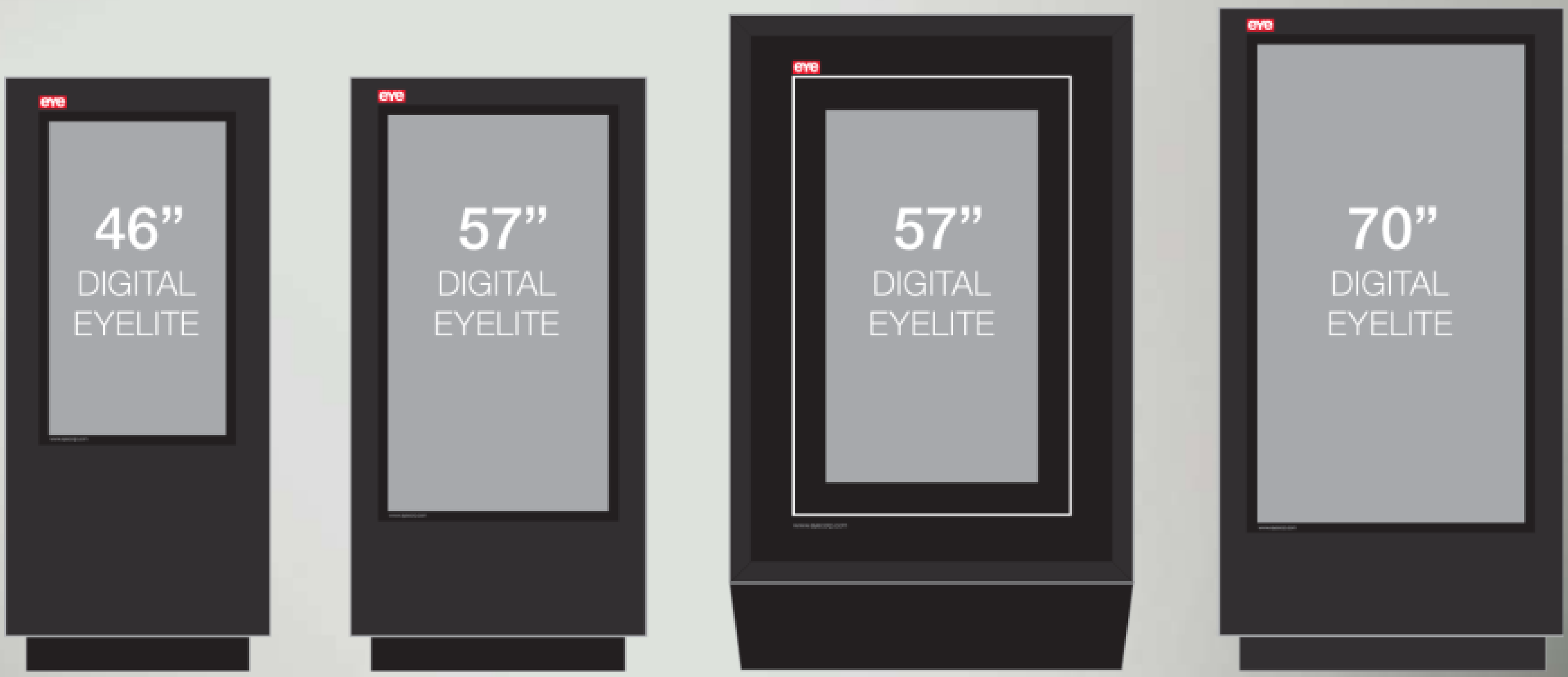
EYE digital display evolution



EYE pioneering Portrait Digital

Floor mounted | Wall mounted | Cell modem network

All use similar file format image resolution: 1080 x 1920 pixels.



Pioneering Landscape Digital

Landscape Digital

Primarily positioned on bulkheads to reach consumers in the most effective way.

2 screens: 1.8m (w) x 0.5m (h)

8 screens: 3.7m (w) x 1.0m (h)

3.5:1

18 screens: 5.5m (w) x 1.6m (h)

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Pioneering Landscape Digital

Locations include

Escalator/travelator transitions between floors

High-traffic areas and corridors

High dwell-time environments

2 screens: 1.8m (w) x 0.5m (h)

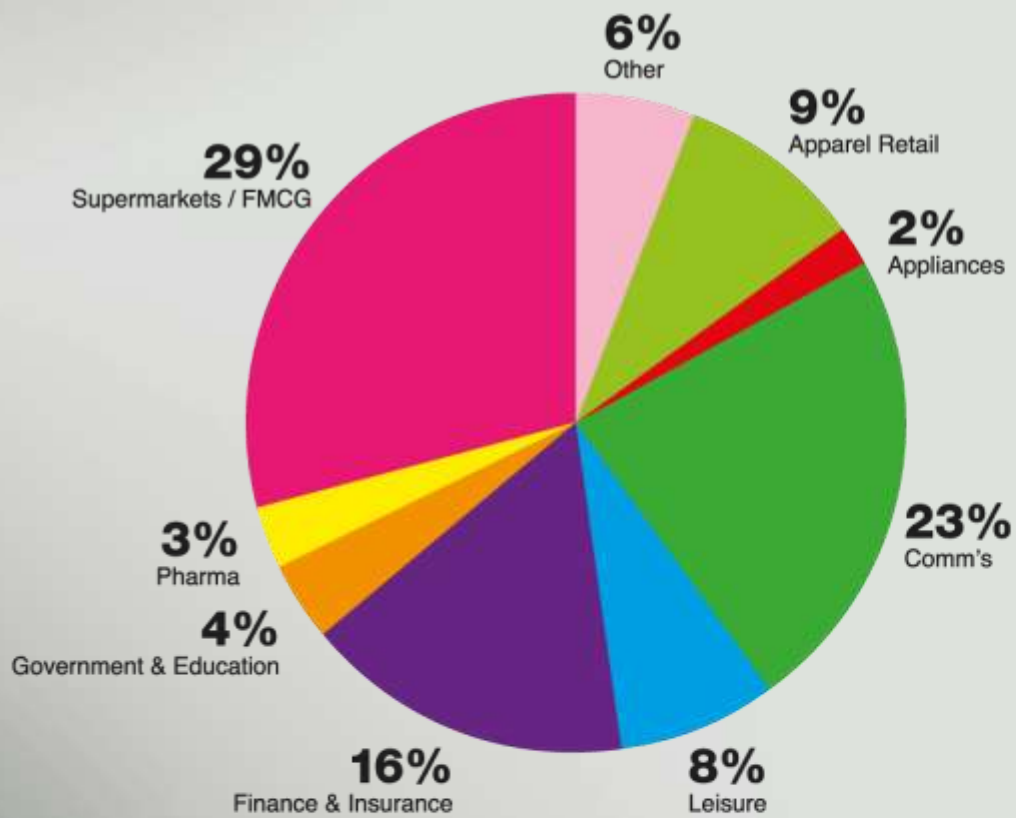
8 screens: 3.7m (w) x 1.0m (h)

3.5:1

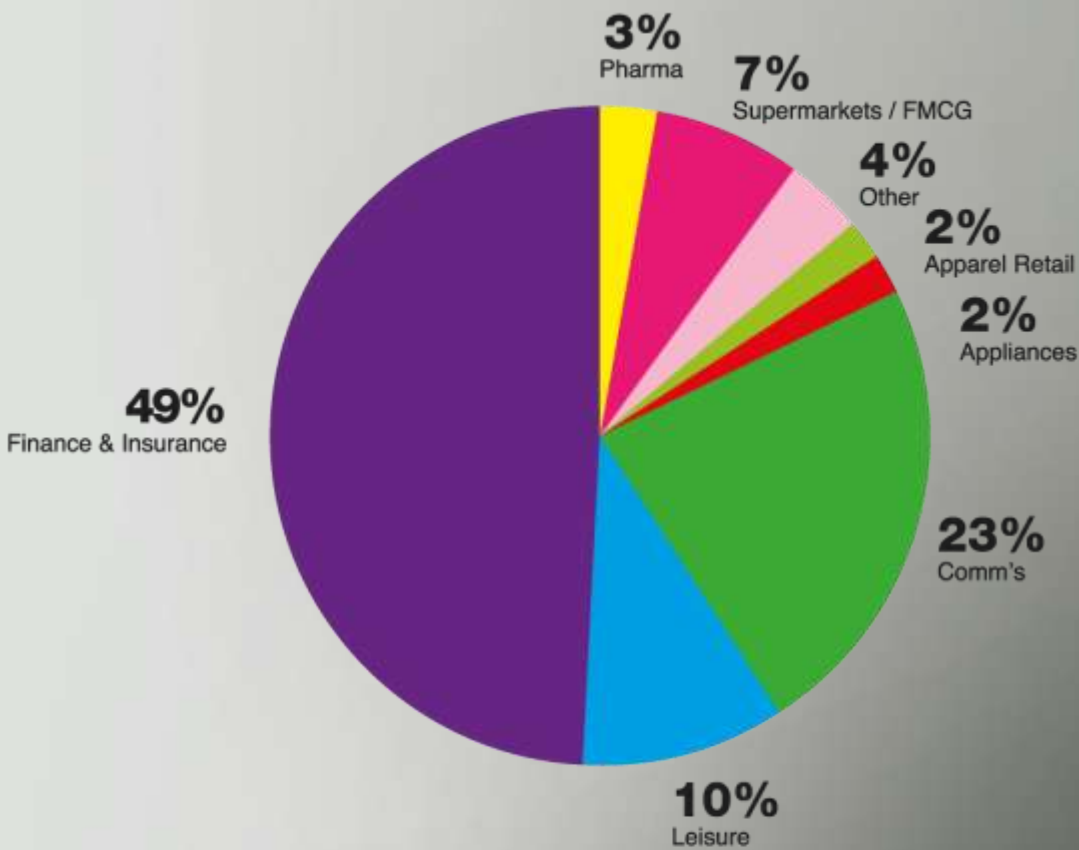
18 screens: 5.5m (w) x 1.6m (h)

Digital value to mall clients

Static



Digital



Digital @ EYE – Displays

Findings

Digital and paper can co-exist

Image quality and size essential

Keep network simple & scalable

Keep loop to a minimum

Other content may be distracting

Short capital life assumption

Reliability is now more important

Work in progress

Variable bookings limited so far

Digital confusion

Creative still to be elevated

Sufficient scale

Old and new co-existence

Hype and expectations

Tech vendor motivations

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9:41 AM
Messages
Calendar
Photos
Camera
YouTube
Stocks
Maps
Weather
Notes
Utilities
iTunes
App Store
Game Center
Settings
Phone
Mail
Safari
iPod
iPhone

Mobile devices

Landscape changing quickly

Too new to understand and too new to ignore – threat or opportunity?

Our audiences cannot live without their devices – what will this mean?

Installed base of smart mobile devices now well advanced in most markets.

Opt-in:Opt-out element may ultimately limit potential – it can be turned off!

Introduces an element of content not consistent with Out-of-Home.

Mobile devices

EYE is exploring

Initially SMS and Blue Tooth as product extensions since 2007.

Wi-Fi a new opportunity to link smart devices and stand alone access.

Unsure where Out-of-Home and POS converge or otherwise.

Intuitively this looks like opportunity.

The Integration

375 unique detections with 83 unique downloads per day (22% Opt-in rate).
Over a 3-week campaign, 1,750 offers were accepted and downloaded to phones.

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Accountability that really + value

Our audiences

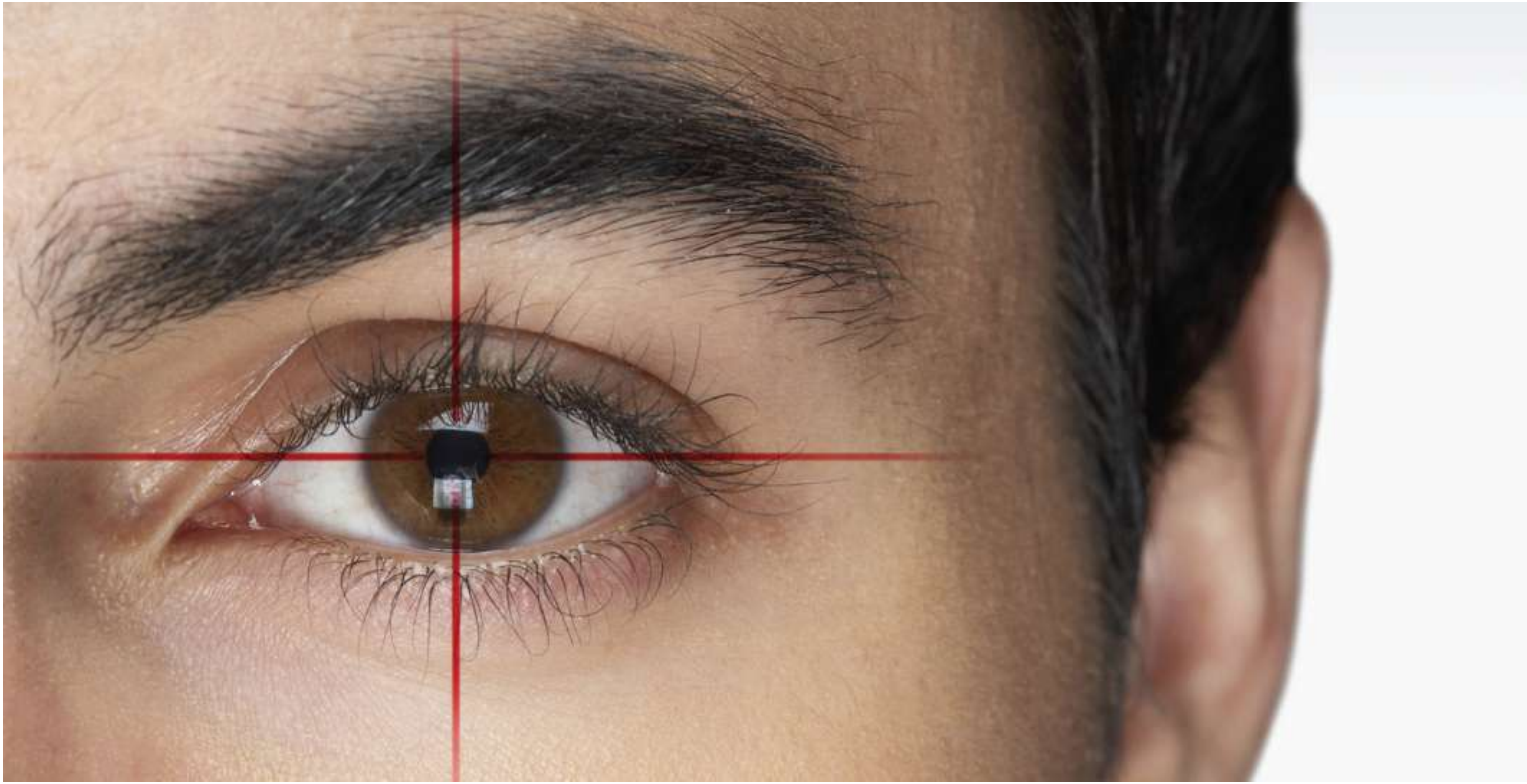
What they…

Measurement

MOVE | Australia

POSTAR | UK

EYES ON | USA



Eye Tracking

Eye Tracking

What is Eye Tracking?

Participants wear special glasses with cameras.

Consumers traverse the environment.

Captured video footage analysed back in the lab.

Eye Tracking

Why Eye Tracking for Out-of-Home?

Untethered environment, untethered methodology.

Real behaviour, real environments, real-time consumers – addresses subtleties of non-intrusive medium.

The commercial application is more effective campaigns from more consumer knowledge.

Eye Tracking

Timing & environments

Timing	Location
March 2008	Singapore Changi Airport
July 2009	Manchester Airport
June 2010	NY, Atlanta, LA Shopping Malls

Methodology

100 participants in total.
1 hour each participant.
Pre-recruited before that day.
Not aware of the purpose of the study.
Engagement defined as: looked at panel for at least 1/5th second when passing.

Singapore Airport 2008

Initial findings

People look at approx. every second panel they pass.

People engage for approx. 2 seconds.

Low-distraction precincts (like the pier on the way to the gate) have higher like-for-like engagement.

Stage 2
Auckland University 2008

New learnings

People scan the environment when they turn a corner/enter the room.

Movement attracts attention – 70% look within half a second of creative change.

Digital should be treated as a moving billboard, not a mini TVC.

Stage 3
Manchester Airport, UK 2009

New learnings

Digital encourages more than just higher engagement – also has higher frequency and longer viewing.

Building reach – packages and placement along the pathway (networks).

Thoroughfares have higher engagement and dwell areas have higher frequency.

10 degrees of separation – people don't generally look up more than 10°.

Stage 4 Shopping Malls, US 2010

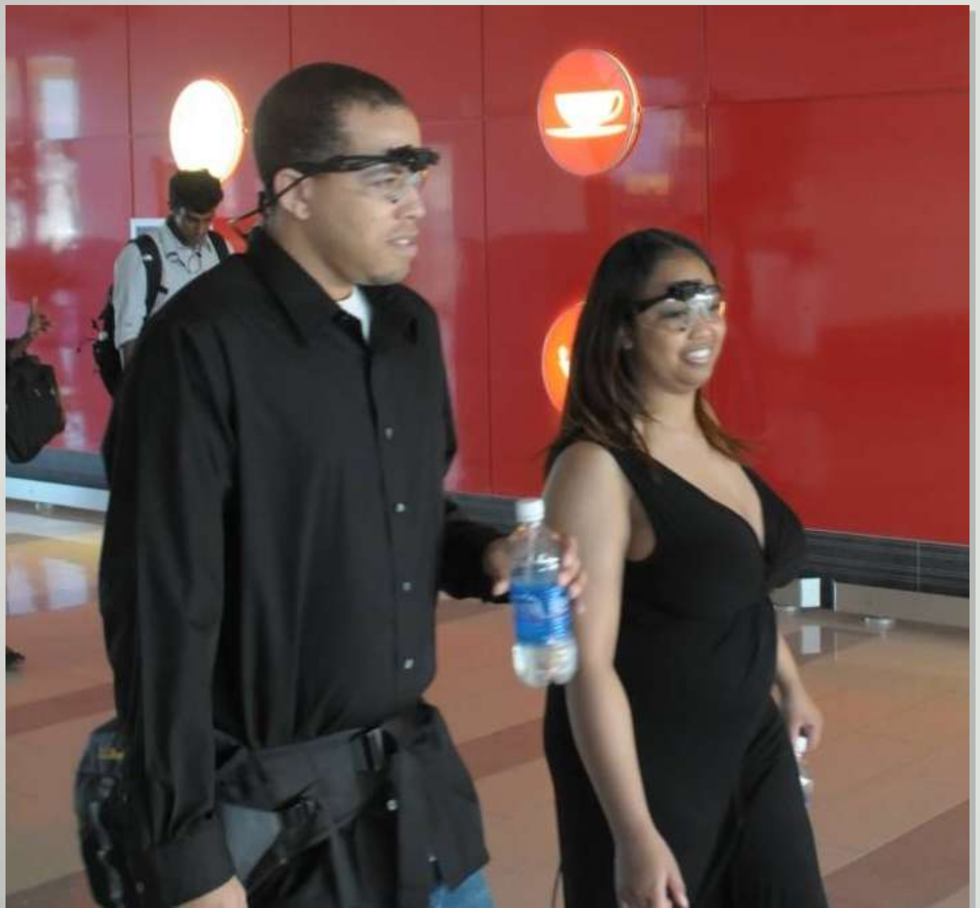
New learnings

There is a type of ‘re-set’ button where re-entering a space maintains the same viewing probability as the first time.

Even as a non-intrusive medium, viewing manages to occupy 10% of the passing time.

The first look is heavily influenced by positioning (proximity, angle, etc). The second look appears to be about the relevance of creative.

Stage 4
Shopping Malls, US 2010



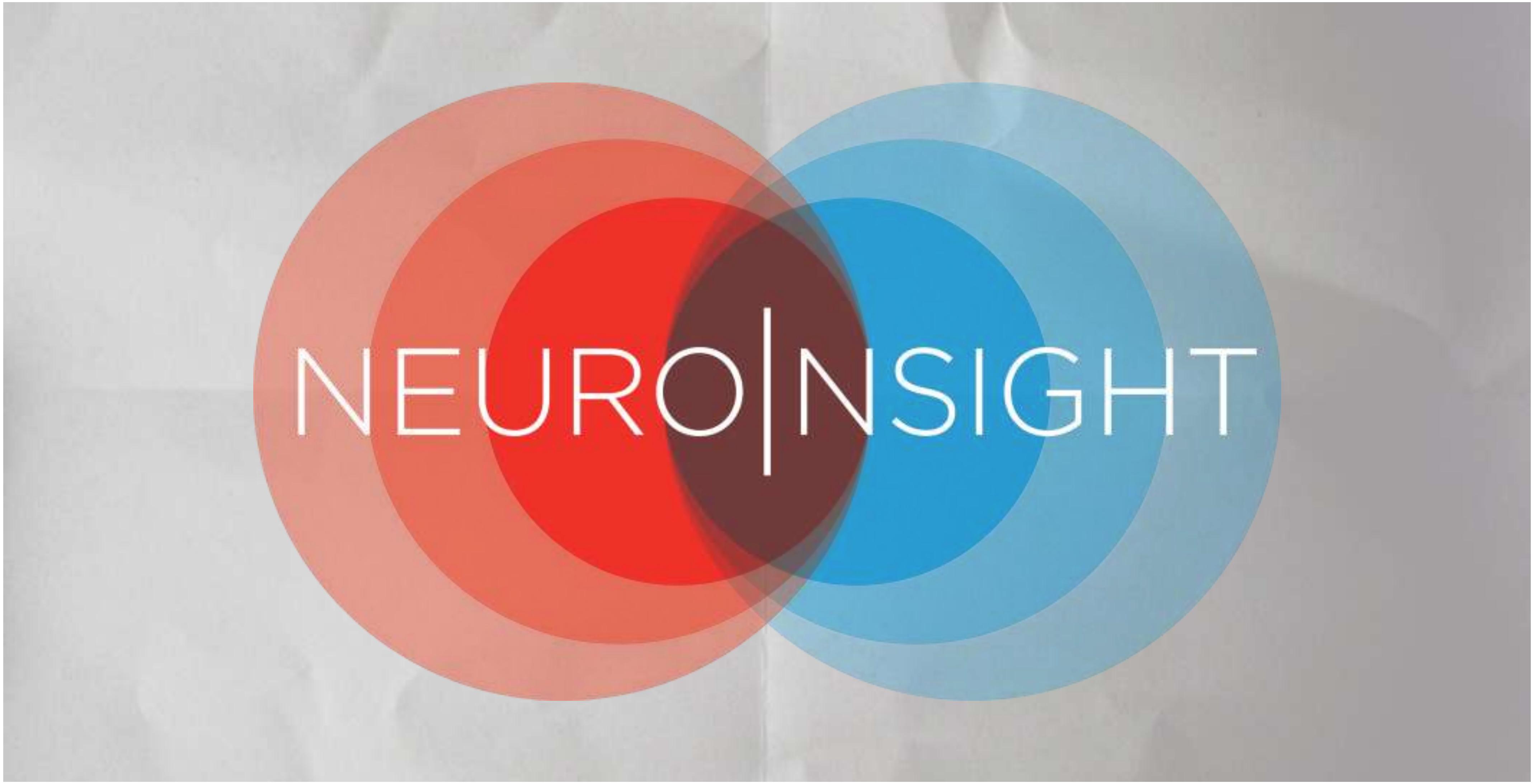
New learnings

Mall Eyelite engagement usually activates at around 15 metres (even though potential for viewing may be further).

Mall panels along the pathway (in front) are 3x more effective than offset positioning.

Content models (including loop duration) reduce the probability of ad exposure.

Eye Tracking benefits the EYE platform


NEURO|NSIGHT

Neuro Imaging

What is Neuro Imaging?

Participants wear a cap with sensors to pick up activity in different parts of the brain.

Video of mall environment walk-through and consequent advertising exposure.

Neuro activity analysed, including pre and post brand responses.

Neuro Imaging

Why Neuro for Out-of-Home?

Non-intrusive medium, methodology captures sub-conscious responses.

Measures effectiveness at a deeper level than recall.

The commercial application – builds and quantifies mall environment attributes.

Professor Richard Silberstein | CEO, Neuro Insights

Methodology

Timing	Location
Aug 2010	Sydney Malls
Mid 2011	UK Airports

Methodology (Sydney Malls)

Commissioned Neuro-Insight.

150 participants.

Mixture on-site/in-lab (priming effect).

Demographic profile of shoppers.

Not aware of the purpose of the study.

SST technology (reduces peripheral ‘noise’).

Core Accountability Proposition

context
the environment

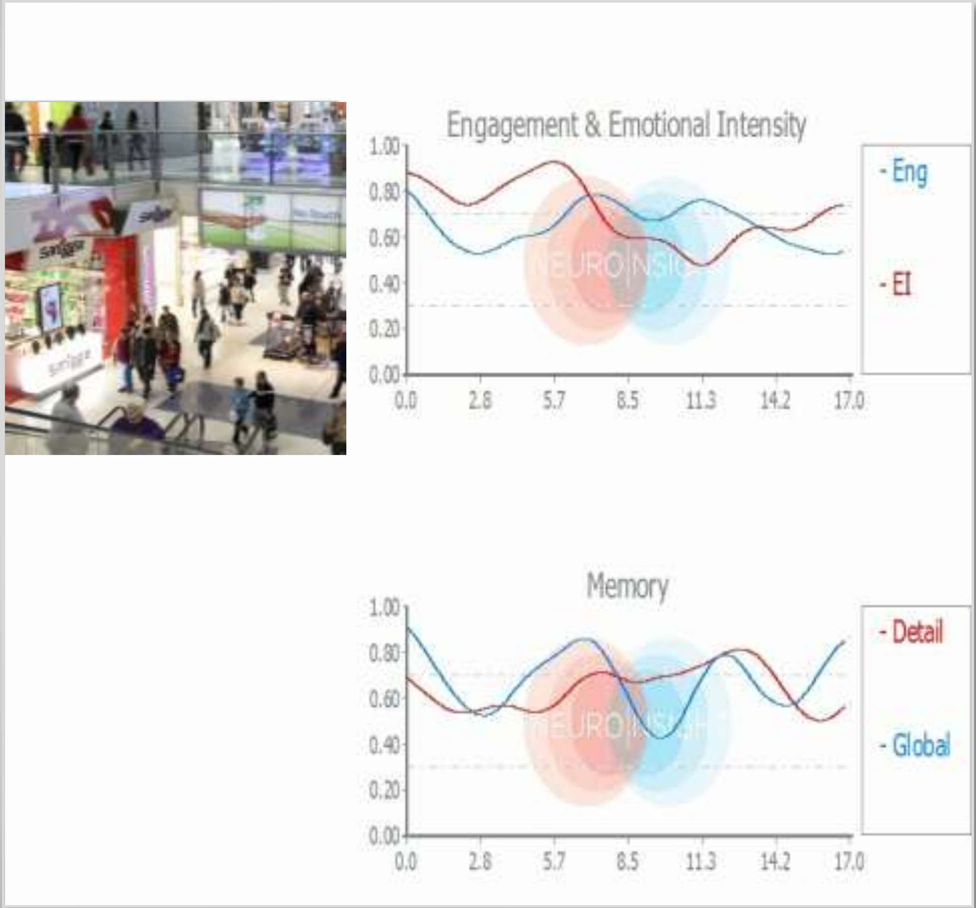
+

audience
the shoppers

=

salience
of your brand

Context… the environment



Environment value

Shoppers are highly tuned into the environment.

Now know when 'magic moments' occur.

Eye Shop journey achieves avg. 32% higher* engagement and memory encoding.

* Compared to Neuro State™ norm

Audience… the Shoppers

Mindset validation

Anticipation of shopping primes audiences.

13% higher brand salience prior to shopping*.

An Eye Shopper's mindset is unique.

* Those about to do a 'live shop' compared to those in the lab who are not on location and are not about to go shopping

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Salience… of the brand

Advertiser benefit

Eye Shop grows brand salience by 11% after just one journey.

Proven to reduce strength of competitive (non advertised brand) by 14%.

Combined effect is opportunity to separate a brand from the category.

The Future of Out-of-Home

Client friendly modern & flexible platforms

Transparent & consistent proof of offer

Reflecting audience lifestyle trends

Pro-active sector – internationally

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