EYE ON THE FUTURE
Where we come from
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, EyeFly Digital Study, January 2011
Internal and external airport media (Australia, NZ, UK)
EYE SHOP:
EYE NOW KNOWS SHOPPERS EVEN BETTER THAN BEFORE WITH NEURO IMAGING AND EYE TRACKING

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EYE works for you
Shopping mall media (Australia, NZ, USA)
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: UM8 LifeLounge 2010
Higher education institution media (Australia, NZ)
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
Late scrolling
Keen to differentiate & lead
Mostly indoor environments
Key locations play to limited scale
Broadcast heritage

Evolution essential
Potential to quantum leap
Limited competitors
Clean & controlled lighting
Opportunity to experiment
Tech savvy
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
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 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)
- **18 screens**: 5.5m (w) x 1.6m (h)

3.5:1
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)

18 screens: 5.5m (w) x 1.6m (h)
Digital value to mall clients

**Static**
- 29% Supermarkets / FMCG
- 3% Pharma
- 4% Government & Education
- 16% Finance & Insurance
- 8% Leisure
- 23% Comm’s
- 9% Apparel Retail
- 6% Other

**Digital**
- 7% Supermarkets / FMCG
- 4% Other
- 2% Apparel Retail
- 23% Comm’s
- 3% Pharma
- 10% Leisure
- 49% Finance & Insurance
- 6% Other
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
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.
Accountability that really adds value

Our audiences
What they...

Do
Measurement

See
Eye Tracking

Think
Neuro Imaging
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**
- March 2008
- July 2009
- June 2010

**Location**
- Singapore Changi Airport
- Manchester Airport
- 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.
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.
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.
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°.
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.
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 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
Aug 2010
Mid 2011

Location
Sydney Malls
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.
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
EYE ON THE FUTURE