

An overview of the international Out of Home industry

globalview 01

kinetic

world watch

Reviewing the latest developments round the globe.

european spotlight

Alex Thompson discusses the uptake of progressive outdoor measurement systems within Europe.

catch the vision

The Worldwide Group showcases their latest campaigns.



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We launched Kinetic in early June and have been thrilled and grateful for the upbeat reaction and acceptance we received from the industry. Launching a new company is a soul-searching process and we hope we've got it right. Time will tell.

The global capability of Kinetic is almost in place. We'll be established in more markets before the end of this year and we're sure we'll have the strongest network in our industry by early 2006.

We're determined to ensure that we remain focused on key client issues: creative and innovative planning, competitive buying, best value, and

ensuring that our clients are pleased with every part of their investment. And even though we've grown in headcount and geographical scale, we're also committed to making sure our senior management will be accessible to you at all times.

The key resource for our multi-market clients will be the Worldwide Group, which will have beacon offices in New York, London, Frankfurt and Singapore. We're privileged to work for some truly world-class companies and we aspire to their high standards.

Do contact me if you'd like to hear more about Kinetic or just talk about the out of home industry. We're passionate about both!

light news

Kinetic is born

'We unveil our new brand to kick-start the launch of Kinetic in a number of markets globally, with exciting and vibrant multi-format campaigns.'



Switzerland: Clear Channel acquire Plakatron

Plakatron, the Swiss Outdoor media owner, has been bought by Clear Channel. Clear Channel is the country's 3rd biggest OOH contractor with approx 700 illuminated, top quality locations.

Singapore: MBO acquisition sees SPH take 80% stake

Singapore Press Holdings (SPH) – the leading newspaper media owner in Singapore – has acquired MediaBoxOffice (MBO), their first investment in the OOH sector. SPH take an 80% stake in the newly-created SPH MBO entity. The remaining 20% is owned by MBO's parent company, IBIZ Asia Distribution.

Germany: Ströer buy DERG from Deutsche Bahn

Ströer, the German outdoor advertising media owner, has bought Deutsche Eisenbahn Reklame GmbH (DERG). Ströer will now take over operations from DERG's previous parent company Deutsche Bahn (DB), the German national rail operator.

USA: JCDecaux renew contracts

JCDecaux has renewed and expanded its NY airport advertising concession for another 10 years. The contract covers JFK, La Guardia and Newark Liberty Airport. The contract also includes the New Jersey-Manhattan PATH train, the Port Authority Bus Terminal and the George Washington Bus Station.

USA: Cemusa victorious in NYC

Cemusa recently won the lucrative \$1bn (v997m) outdoor advertising contract from New York City to sell ad space on bus shelters and newspaper kiosks. NYC awarded the 20-year contract to the Spanish outdoor company following a five-way pitch.

Hong Kong: JCDecaux buys Texon for \$19.7 million

JCDecaux announced the acquisition of Hong Kong sector company Texon International. Texon manages over 4,800 advertising boards within Hong Kong's bus shelter network under long-term contracts with the island's three main public transport bus companies.

France: Clear Channel win Connex contract

Clear Channel emerged as winners of a 5-year contract from French transport company Connex for the advertising space on 29 bus networks in France. The addition of further networks marks a significant increase in their coverage.

China: Viacom Outdoor takes control of Magic

Viacom Outdoor has entered into an agreement to acquire 70% of Magic Media. Based in Beijing, Magic owns the rights for advertising on the city's bus system. This is Viacom's first purchase in China.

innovations

Reactive Billboard



Ford's latest OOH advertising campaign in Belgium incorporates a billboard that reacts to the viewer. Using in-built cameras and speakers, the reaction of people in front of the poster is transmitted to a monitor where an actor speaks and manipulates the movements of the 'electronic' face in the poster.

ComboBoxes

To add innovation to Grand Cherokee's latest advertising campaign in Zagreb, new ComboBoxes were installed in three top locations in the city. The Perspex box contained a model of the latest Grand Cherokee, whilst a fixed element on top displayed a creative advertising banner.



european focus

Alex Thompson, Chief Operating Officer, discusses the uptake of progressive outdoor measurement systems within Europe



For more information, contact Alex Thompson at alex.thompson@kineticww.com



Recent developments signal encouraging progress on the research and accountability front. European media owners are becoming increasingly involved in outdoor measurement systems which bring new tools to monitor campaign delivery.

This will certainly begin to silence those doubters who have claimed that outdoor lacks the fundamental accountability of radio, television or press. Whilst outdoor does not enjoy the data collection listener, viewer and readership surveys can provide

it is equally not hamstrung by the potential shortcomings of these systems. In fact many of the outdoor measurement systems developed recently steer away from the 'potential to see an outdoor ad' and concentrate on the far more rigorous calculation of 'making actual contact'.

GPS (Global Positioning System) devices, universally applied by ocean yachtsman to ascertain their exact position when out of sight of land, have been used to track the movements of people. These have then been cross-referenced to electronically

mapped outdoor panels. Italy has completed their national study, Audiposter, using this technology. Switzerland and Germany are committed to follow suit.

GPS certainly measures movement more accurately than before and is a welcome tool for travel surveys. However, it does not provide the complete picture of whether consumers actually see the ads they pass.

Research in Europe is becoming inclusive of more formats, irrespective of national boundaries and with a far greater similarity of methodology. This means that advertisers can be provided with greater insight into more platforms and increased opportunity to compare effect and quality across borders.

It is accepted that different formats work more efficiently for different audiences. To be able to measure not only the effect



of each format, but the combined contribution of a number of choices, is an important advancement. Retail packs, roadside panels and transport offerings will soon be measured together. POSTAR Inclusivity in the UK has considered how best to dovetail their established roadside measurement system with the underground. Other sectors will follow.

In France the Affimetrie system, designed initially to measure billboards, has been expanded to take in street furniture. This provides advertisers with a more complete view of how their campaigns have performed. The Geomex system in Spain has moved from being a research tool that covered only large conurbations to also consider smaller towns. A bus model is under consideration. The Portuguese industry is looking to expand the Geomex mapping system to combine with a research approach endorsed by other media, in order to develop a more complete Iberian model.

Further a field The Traffic Audit Bureau in the USA has recognised a need to follow Europe's lead and is working

to develop a credible audience measurement system. Australia has also taken steps in this direction with The Outdoor Media Association developing MOVE (Measurement of Outdoor Visibility and Exposure).

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This increase in global measurement activity all serves to fuel Kinetic's core beliefs. We offer leading advice for planning and buying across markets, armed with both proprietary and industry research that allows us to add value and increase the impact of our clients' campaigns. This gives our clients the ability to look at the way they approach OOH more broadly, across Europe and elsewhere, with more confidence than ever before.

catch the vision

Latest campaigns from The Worldwide Group

1. DHL

To help sustain and grow DHL's brand awareness across the US, Kinetic planned and executed a campaign targeting shipping decision makers within small, medium, and large companies. Traditional OOH formats targeted commercial, retail, and high traffic areas, whilst projection media and spectaculars reinforced the DHL message that "Customer Service was back in shipping".

2. VISA

Kinetic, in collaboration with Mintel, has been appointed to inspect and audit all of Visa International's Latin America and Caribbean airport-related signage across the region. This spans 20 different markets and incorporates a variety of media formats. The first comprehensive campaign audit has been delivered to the client through a secure online system and has already gained positive feedback.



3. L'Oréal

To promote the launch of L'Oréal's Glam Shine Cream in Hungary, Kinetic booked a multi-format campaign in Budapest. Traditional billboard formats were utilised as well as banners, fully wrapped buses, Smart cars, floor stickers and security gates in hypermarkets.

4. Samsung

Kinetic have worked closely with Cheil, Samsung and a variety of European airports to identify prime locations for the installation of several 3D special build units. LCD TVs and 3D hands displaying the latest Samsung mobile phones were placed at airport compounds, ensuring they were the first thing seen by arriving passengers.

5. Bombay Sapphire

Kinetic has worked closely with Bacardi Global Brands to implement a Bombay Sapphire Martini Glass in airports globally. Part of the 'Bombay Sapphire Inspired' campaign, the exhibition demonstrates the association between the brand and the world of international design. 'Martini Glasses were displayed and viewed by passengers in the same way as they would be in a gallery. Airports hosting the exhibition include

Singapore Changi, Bangkok, Sydney, Heathrow and Copenhagen.

6. SABMiller

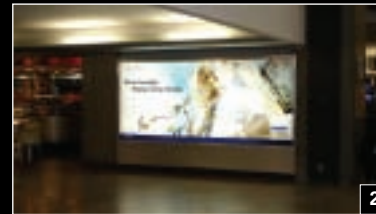
Kinetic ran a tactical campaign for SABMiller at Shanghai Pudong International Airport. The campaign ensured standout for the international brand with light-boxes and banners dominating the arrivals corridor and prominent flags strategically placed along access roads from the airport to the city.

7. Benetton & Sisley

Kinetic Hong Kong created a strong creative campaign for the fall/winter season for both United Colours of Benetton and Sisley brands. Prominent large format billboards and bus wraps were placed in selected fashion areas to maximise both impact and visibility.

8. IBM

IBM's Business Value campaign ran in both the UK and Germany. Specifically targeting airports, Kinetic planned several large format sites located within key business networks. Highlights included an exterior megaposter in Munich, a corridor wall wrap at Frankfurt and window banner displays at Dusseldorf airport business lounge suite.



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Ylva Persson is Bacardi's Global Marketing Director for Travel Retail and Duty Free. Responsible for the global portfolio of Bacardi brands including Bombay Sapphire, Grey Goose, Dewar's, Martini and of course the Bacardi range, she travels both frequently and extensively around the globe.



BACARDI

Describe yourself in 3 words

Genuine, Driven, Creative

What is the first thing you do when you get to work in the morning?

Have a chat with my colleagues and grab a coffee

Proudest career moment?

Launching my own brand, Svensk Vodka, even though it turned out to be more of a learning curve vs total success story!

How often are you required to travel for business purposes?

Too frequently, for the first 6 months of this year I have been away more than 50% of the time.

Here are some quick-fire questions, can you tell us:

Your favourite restaurant? The Fat Duck, England

Your favourite hotel? The Clift Hotel, San Francisco

Your favourite city? Rome

And finally, your favourite airport?

Singapore as it is created for passenger's vs security reasons!

We know you are a frequent visitor to NY:

How often do you travel there? So far this year I have been 5 or 6 times

What do you enjoy most about it?

The vibe and the late night hotel bars

And least? Not seeing the skyline

Favourite hotel(s)? SoHo Grand or SoHo House

Favourite restaurant(s)? Megu, albeit a bit pricey

Favourite tittle? The Appletini or a classic Bombay Sapphire Cosmopolitan

If you had a few hours to kill, what would you do?

I am a big fan of Canal St (junk and fakes) to browse for small gifts. SoHo is also a must-see with its great cafés and galleries

Finally what advice would you give to travellers visiting for the first time?

Don't just force yourselves to do the 'touristy' bits, enjoy the city for what it is and just allow it to get to you

