



SHELL TV



Shell Summary

- Launched July 2008
- 114 Select outlets nationally
- Shell controls approximately 33% of NZ oil market
- Two screens in 75% of outlets, 40" at entrance and 32" facing queuing customers
- Audio via directional speakers significantly increasing ad recall (Mobius research Nov 08)
- Network runs 24/7
- All sites on-line for real time distribution of content
- 1.7 million transactions per fortnight across the network with the audience in cars expanding this number to 2.3 million.



SHELL TV



Screen Positions



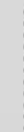
Research Methodology Nov 08

- Intercept exit interviews across three Shell outlets (Manurewa, Massey, Pakuranga)
- Survey size n=500 with margin of error +/- 4.4%
- Key issues explored:
 - Overall awareness/recall of TV screens
 - Unprompted recall of content
 - Unprompted recall of specific brands
 - Impact of screens on in-store experience



Research General

- 77% of people surveyed noticed the screens
- 73% of those could recall content
- This represents 950,000 people across the whole network.
- 70% of people could recall the weather screen.
- 87% of people thought the screens made the store more interesting and only 3% less interesting.



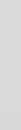
Research Brand Specific

- Did you recall advertising for a TV show? Yes 46%
- Do you recall what program it was for?
TV1 57%
TV2 43%
- Do you recall advertising for a car company? Yes 54%
- What car was it for? KIA 64%
- Did you recall for ACC driving to conditions? Yes 59%
- Was the tip clear and helpful? Yes 79%



Planning and Buying

- 120 second loop with maximum six advertisers
- Minimum 82,000 OTS per day across
- Average CPM \$7.00
- Loop matches dwell time in peak periods
- Loop contains news ticker, weather and information designed to engage viewer
- Bookings in two week executions but can be segmented for specific campaigns
- Bookings can be made in 8 or 15 second slots
 - 8 second \$10,500 per fortnight
 - 15 second \$14,750 per fortnight



Some advantages of digital

- Flexibility – digital allows content to be changed regularly and instantaneously
- Personalisation – content can be constant across the entire network, or personalised per region or even per store.
- Sustainability – the global drive for sustainability is a major issue. The ability to eliminate POS (most of which is not recyclable) is an attractive proposition for any business.
- Reduce Printing Costs – a significant part of any large retailer's budget is print. By moving to digital the cost of producing expensive POS material can be reduced.

