Writing this issue was thirsty work, it's got us all dreaming of summer celebrations and getting back to good times in the sun. It has been a difficult year for beverage producers with 'dramatic volume declines', according to Alcohol Beverages Australia. While pantry filling in March helped boost the industry, April was the worst month on record for sales for many beverage categories.

But it seems the market is bubbling up again and we are pleased to share some refreshing campaigns appearing across the JCDecaux network. We want to inspire you and share ideas that will highlight how JCDecaux's scale, flexible solutions and audience intelligence, when coupled with impactful creative, is playing a crucial role in getting us all inspired to raise a glass again. Of course, no one has earned a celebratory drink more than our Melburnians.

The Age reported restaurant and café owners say on the day Melbourne reopened, "the vibe is outstanding. It feels like we've got some of the atmosphere back that Melbourne is so well known for... the first tables I served wanted champagne!". Congratulations, your newfound freedoms have been hard earned and it's great to see you getting out and about again.

500K 400K 300K 200K 100K 0 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 MELBOURNE DAILY AUDIENCE VOLUME, OCTOBER JCDecaux Adsquare audience mobility, 1-30 October 2020

Last week's move to the 'third step' of Melbourne's road to reopening saw a 23% daily lift in CBD audience mobility, 17% in the suburbs.

600K

Cheers, Melbourne!



With 85% of all beer sold in Australia. made in Australia, our vibrant beer sector is a major driver of economic **activity** and domestic jobs,

supporting vital cogs in industry from

BEERS BOOST

THE ECONOMY

Australian farmers upstream to brewing, packaging, distribution and freight, all the way through to retail, tourism and hospitality. In the recently published 'Beer: The Facts', a report compiled by the Brewers Association of Australia we learned that every Australian schooner (425ml) of beer sold in pubs and other licensed premises contributes \$7.50 to

GDP, while its off-license equivalent in packaged liquor store beer sales contributes \$2.90 to GDP. Averaging these, every Australian made beer contributes \$4.34 to Australia's GDP. Source: ACIL Allen Consulting, Economic Contribution of the Australian Brewing Industry 2018-19 from Producers to Consumers. March 2020

THE STOCK RIMS OF AUSTRALIAN BEER

\$0.88 retailers supply chain \$0.60 Other retailing

Other aspects of

TO AUSTRALIA'S GDP

ON AVERAGE, EVERY AUSTRALIAN

MADE BEER CONTRIBUTES \$4.34

\$1.20 Retailing pubs, clubs, cafes and restaurants

supply chain areas Packaging materials Agriculture and processed agriculture

Beer manufacturing

Other manufacturing

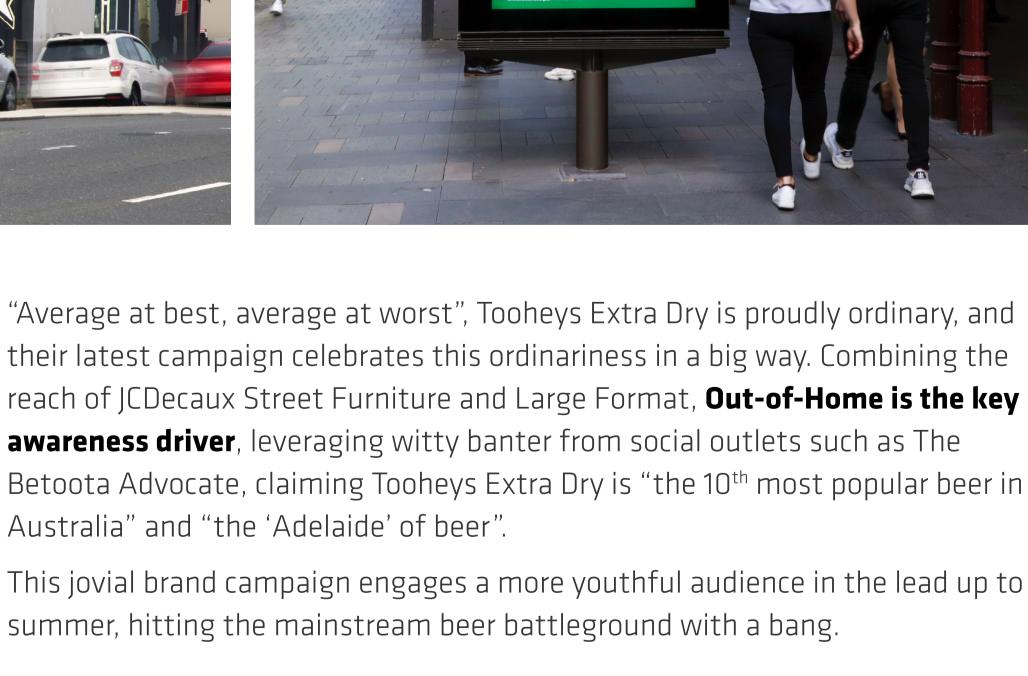
\$0.05

ANDORA

\$1.28

\$0.17





THE 10TH MOST POPULAR BEER IN AUSTRALIA

PROUDLY ORDINARY

FOR THE NOT-SO-NORT-Y Global figures have shown a 30% uplift in no or low-alcohol beers since 2016, driven by Gen Z and

consuming alcohol.

Appearing across the country on JCDecaux Transit Full Backs, a format that indexes highest with drivers and passengers, NORT boasts the ability to quench a thirst while still allowing you to swim, parent, exercise, work and drive after. What's not to love? Source: The Guardian

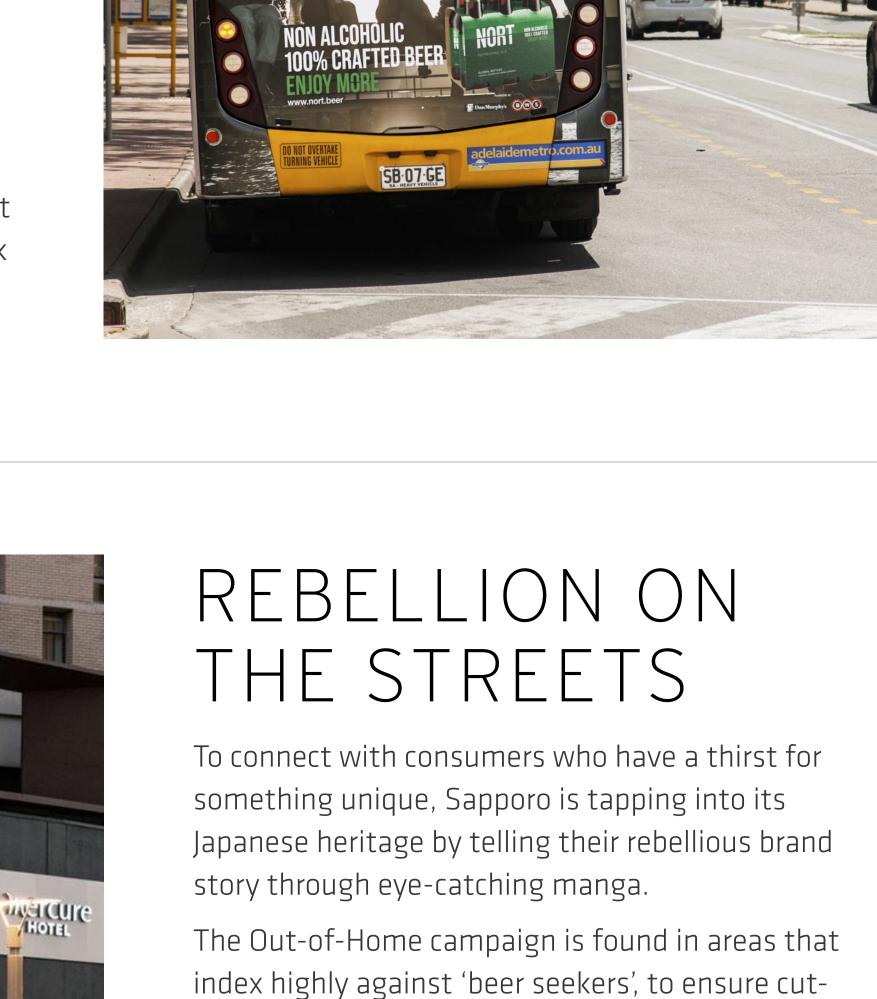
Millennials' strong focus on health and wellbeing.

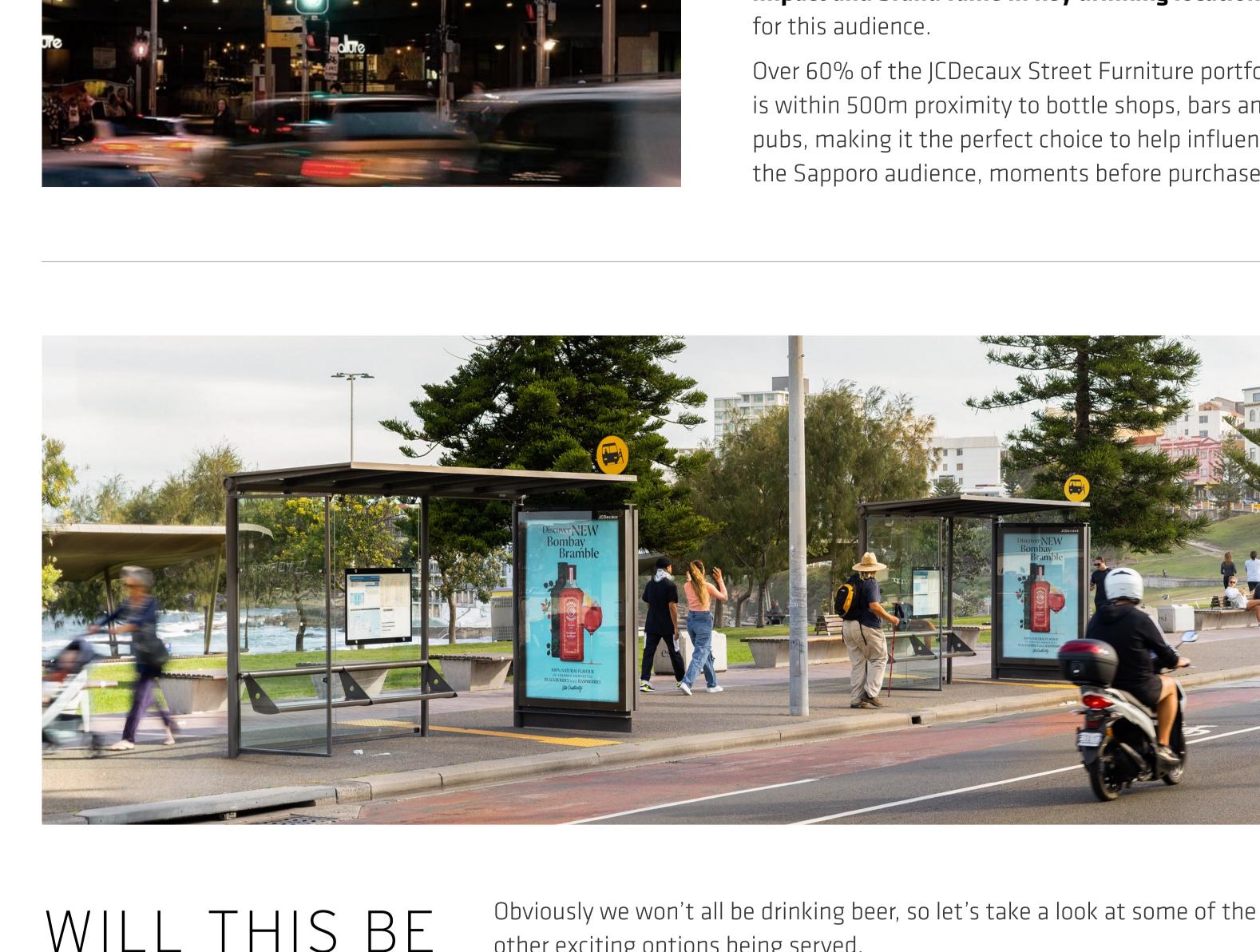
refreshment of beer, without the downsides of

With that in mind, Sydney Northern Beaches brewery

Modus Operandi last month launched their latest craft

beer, NORT, with the aim to provide all the flavour and





for this audience.

other exciting options being served.

want to be seen drinking it.

be there to stir creativity.

Source: Pigeon Project, September 2020

through and conversion where they live, work and

impact and brand fame in key drinking locations

Over 60% of the JCDecaux Street Furniture portfolio

is within 500m proximity to bottle shops, bars and

pubs, making it the perfect choice to help influence

the Sapporo audience, moments before purchase.

shop. JCDecaux Large Format is used to drive

In a bid to make Bramble the most 'grammable drink of summer, Bombay

partnered with JCDecaux to launch a campaign sure to be seen by those who

Including Smartframe, Citylights, StreetTalk and Spectacular locations across

purchase, as well as connecting to passion points for the target audience, all

the while painting the town Bramble crimson. With 72% of people saying they

will be outdoor drinking and dining more over summer, Bombay Bramble will

the Eastern seaboard, the campaign hit the very important path-to-

With a range of wines that celebrate the distinctive Barossa Valley flavour profile, prestigious winemaker Krondorf proudly honours their brand story. A mysteriously dark and elegant creative has drawn the JCDecaux Citylight audience to discover more about this long-standing Australian brand. The campaign is guaranteed to reach fine wine lovers, who are 1.5 times more likely to be big spenders when it comes to premium wines. It's sure to lead to deliciously rich sips of the 'Old Source: JCDecaux Orbit

TALL, DARK AND

MYSTERIOUS

THE MOST

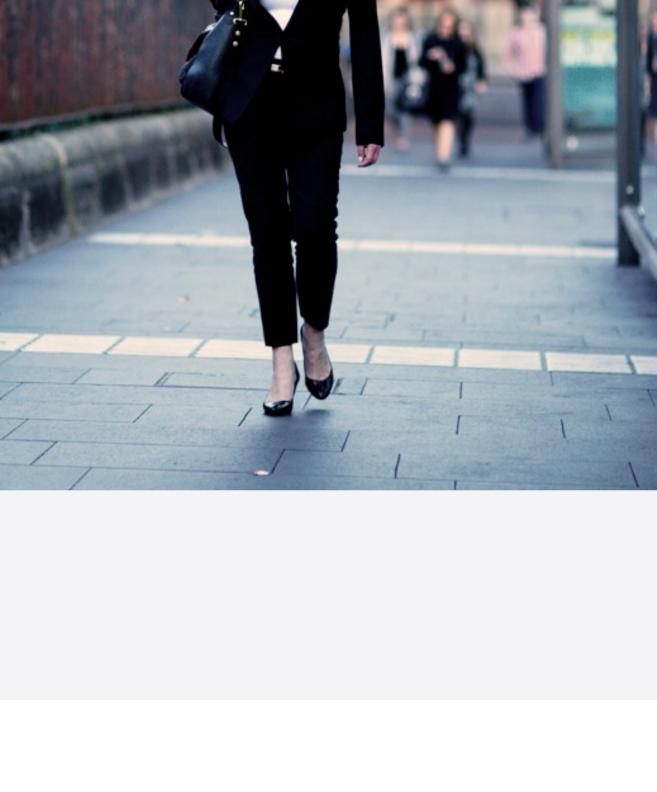
DRINK OF

SUMMER?

'GRAMMABLE

Salem' Shiraz, that pays tribute to Barossa Valley history.

SAFETY



VOTING IS AN

proactively met community expectations around the display of alcohol advertising, ensuring that it is not displayed within a 150m sightline of a primary or secondary school in Australia. This year, the industry extended restrictions to the display of discretionary food and drink. Out-of-Home is brand safe for alcohol and discretionary drinks advertisers and JCDecaux fully complies with all relevant regulations on how these products can be advertised. In accordance with the Outdoor Media Association Placement Policy, we ensure the placement of this advertising is appropriate, always.

Since 2009, the Out-of-Home industry has

ABSOLUT PRIORITY In the US up to half of the eligible population do not vote. Which is why Pernod Ricard gave all US employees the day off on November 3 to ensure they were able to exercise their democratic right.

In the lead up to this week's election, numerous brands

have been supporting greater voter turn-out. Premium

vodka brand Absolut recently did just that with their

Out-of-Home, TV, digital and social. In a bold move,

this important campaign encourages Americans to

#VoteResponsibly campaign, appearing across

prioritise voting above drinking.

Source: Politico

JCDecaux New York

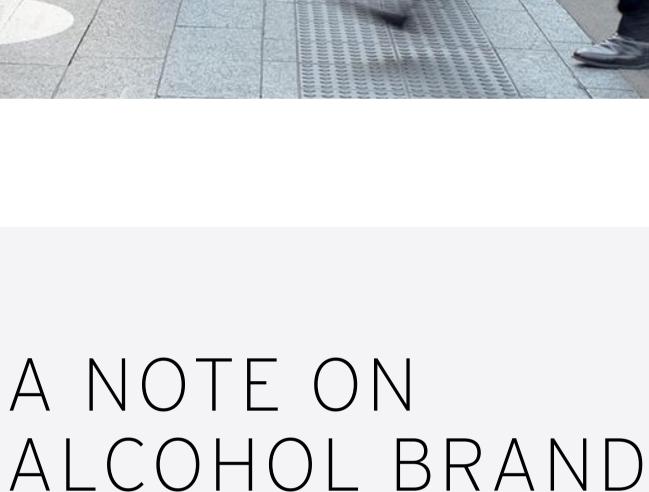
YOUR VOTE CAN SHAKE

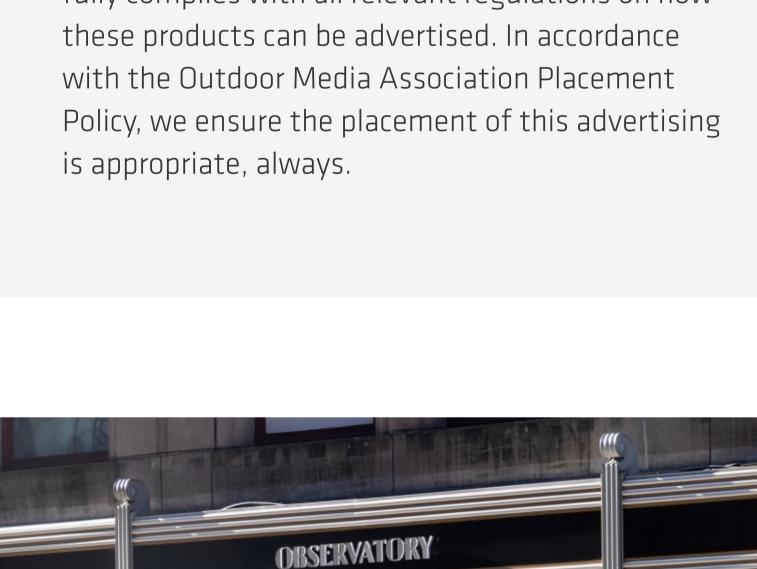
ABSOLUT.



movements of 3.6 million smartphone users around Australia. By geofencing all of JCDecaux's locations, we receive weekly 'audience mobility updates' to understand exactly what's going on across our network.

NATIONAL JCDECAUX ENVIRONMENTS, EXCLUDING MELBOURNE Audience volume as at w/c 19th October, compared to pre-lockdown levels (Feb-Mar 2020)





CAN'T.



from respected people within the media and marketing industries.

JCDecaux

ROADSIDE LARGE FORMAT SUBURBAN STREET FURNITURE Audience at -17% pre-COVID levels Audience at -24% pre-COVID levels