



Yellow Pages

THE MARKET

Not so long ago, if you wanted something, you went to the General Store. Even if the white-aproned chap behind the counter didn't have what you wanted, he simply ordered it in. With due respect to our forebears, life may have been hard, but shopping was easy.

Nowadays we're spoiled for choice. There are countless brands, countless places to get them and dozens of ways to find, to compare, or to wind up thoroughly confused.

More and more the online environment is redefining the information sources marketplace. Where once printed directories owned the information marketplace, today online, telephony and printed media all compete. Obviously, online brings a whole new breed of competitors. That's why Yellow Pages® has grown into an 'information brand'. The Yellow Pages brand is now made up of online, directory and voice channels, competing with online directories, search engines and Internet portals.

It is now far more than just a phonebook.

We're a lot more mobile than we used to be, hence Yellow Pages® Connect. We also look to the internet to find what we need, hence Yellow Pages® OnLine, and as our cities have grown larger and there's more need for a sense of community, the Yellow Pages local directories are becoming more and more important.

ACHIEVEMENTS

The logistics of servicing an almost billion-dollar directory market are astounding.

Pacific Access produces 75 Yellow Pages directories nationally. There are 6 major

delivered as over 13.7 million directories¹.

On average, 49 % of consumers between the ages of 18 and 64 in Australian metropolitan and selected regional markets use the Yellow Pages directory in any seven-day period.² This equates to over 4.3 million users weekly, resulting in approximately 2.5 million purchases (or intentions to purchase)³.

The Yellow Pages OnLine site is Australia's most visited online business directory. The number of unique users doubled over the past year⁴.

Pacific Access takes its environmental responsibilities seriously too. All the ink, glues and dyes chosen are environmentally friendly. In 1991, Pacific Access launched the Book Muncher® directory recycling initiative to ensure that out of date directories received another use and generated income, instead of waste. The program enabled residents and businesses to deposit their old White Pages™ and Yellow Pages directories in special Book Muncher bins at service stations throughout Australia.

In the 1980s, Pacific Access decided to create the Yellow Pages® Small Business Index – a quarterly survey that measures the current climate of small business and reports on projections for the forthcoming quarter. In 2000, this was expanded to include medium businesses, and was re-branded as the Yellow Pages® Business Index - Small and Medium Enterprises. Today, the Index is accepted as a leading – and truly independent – barometer for the SME sector of the Australian economy.

Even Yellow Pages marketing is world's best practice. The Yellow Pages brand has won dozens of local and international creative advertising awards in the past ten years.

HISTORY

The world's first telephone directory was published in Connecticut in 1878, only two years after Mr Bell made the first phone call. As telephone usage began to grow and spread, naturally so did the directories. In some cities, what began as a humble sheet of paper now requires two comprehensive volumes.



Australia had to wait until the 1920s before we received our first directory, except back then it was actually pink. And all 40 pages were neatly contained within the standard telephone book.

The directory that became the Yellow Pages directory officially began in 1924. But it wasn't until 1975 that the colour of the directory was changed from pink to yellow, primarily because of a worldwide shortage of pink paper. Yellow was also the colour recognised internationally for classified telephone directories⁵.

THE PRODUCT

The pace of life is getting faster and faster. Look what email has done to our lives. Now, in the time it takes to fold a letter, you can send an email half way round the world. And the sender normally wants a reply just as quickly.

This is the world we live in. And the various Yellow Pages delivery channels have adapted to suit. We are all 'time poor'. Our need for mobile assistance is growing and there is an expectation that life's more mundane activities will become faster and easier.

Despite all this change, we want to retain a sense of stability. We want direction from a trusted, familiar brand. In this context, there is little doubt that the Yellow Pages directory will remain Australia's most trusted and most comprehensive business directory.

The Yellow Pages directory is Australia's most used business directory⁶. The metropolitan directory still represents the foundation of the Yellow Pages brand and clearly dominates the print medium. As consumers and advertisers continue to explore electronic advertising media, there is a major opportunity to direct users toward the Yellow Pages OnLine site.

Currently over 61%⁷ of all Australian businesses and 33%⁸ of all Australian households are connected to the Internet, with over 8.7 million Australians accessing it regularly.

Today the Yellow Pages OnLine site is Australia's most visited online business directory⁹.



metropolitan directories, 19 local directories (with an extra two local directories being launched in 2002) and 50 regional directories covering even the smallest country towns. Each year, more than 13.7 million copies are delivered – that's one to almost every home and business in Australia.

The Yellow Pages directory contains over 2,500 classified headings. There are more than 40,000 individual pages of advertising which, when printed, become 5 billion pages, bound and

The directory site is currently generating millions of searches each month¹⁰, which translates into many enquiries each day. The site enables consumers to locate and profile any business 24 hours a day, 7 days a week.

Obviously, the *Yellow Pages* directory won't fit in your pocket. Which helps explain the need for *Yellow Pages Connect*. This places the entire *Yellow Pages* directory database at the end of just one phone number. The appeal of this to a youthful, mobile phone infatuated culture is obvious.

The mobile phone is an integral part of their life. Typically, they want information quickly. They don't want to think, they want to act. *Yellow Pages Connect* is the only 'live' service featuring the *Yellow Pages* directory listings, with access to 1.8 million businesses Australia wide and with the ability to directly connect customers with most of them on the spot.

Pacific Access also produces localised *Yellow Pages* directories for 19 selected markets (with an extra two local directories being launched in 2002) in Brisbane, Sydney and Melbourne. They contain listings of local businesses, street maps and information pages relevant to the local community. This complete reference is popular with people who wish to support the businesses in their local area.

providing a more tailored search experience by prioritising those headings which are more relevant for consumers around the home. The new *Yellow Pages* local directory will be smaller and more compact, making it easier to handle and giving it a distinct local feel.

PROMOTION

The *Yellow Pages* brand is one of Australia's most loved and memorable brands.

Yellow Pages has been described as 'a potent brand in its own right'¹³ and it has gone from strength to strength since then.

From the early '90s it was known that "the future of the *Yellow Pages* brand would rely on it being a brand people liked to use, rather than one they had to use"¹⁴. Subsequent communications lifted the *Yellow Pages* brand into a new dimension. There has been a constant



Jan" became part of the vernacular.

There is a common 'tone of voice' across the *Yellow Pages* brand. As part of the launch of *Yellow Pages Connect* you see a mother in hospital with newborn twins. The first thing Mum does is call *Yellow Pages Connect* for a vasectomy clinic. No

matter where you are - or what you need, you can find it with *Yellow Pages*.

Effectiveness awards have also proven the success of *Yellow Pages* advertising with wins in consecutive years, 1999 and 2000, at the *Yellow Pages Publishers' Association Awards* (YPPA) in the US, where Australia accepted silver and bronze awards for the most effective business-to-business and consumer advertising in the world.

The *Yellow Pages* brand has also been a dominant outdoor advertiser in the past few years. The campaign has won at Cannes, New York Festival and other award shows. The 3D executions promoting the headings in the *Yellow Pages* directory and *OnLine* service are an innovative use of the medium.

BRAND VALUES

The overwhelming fondness that users feel for *Yellow Pages* is reflected in the array of attributes that they readily associate with the brand. Consumers see it as warm, genuine, empowering and down to earth, and attach themselves to the warmth and comfort that the *Yellow Pages* brand



RECENT DEVELOPMENTS

A year ago, the *Yellow Pages Connect* service was launched. This national dial-up directory service provides approximately 100,000 referrals each week¹¹.

The *Yellow Pages*® Business Ideas Grants is one of a number of initiatives designed to support Australia's small and medium enterprises. This year a new e-business grant has been established that will be awarded to a small business with a great online business idea or an idea that has a significant online strategic component.

The *Yellow Pages OnLine* site is continually



being enhanced to ensure that it provides a satisfying user experience and currently ranks as the most visited Australian online business directory¹².

Pacific Access is also re-launching the *Yellow Pages* local directory for the 2002/03 edition;

stream of humorous and creatively outstanding advertisements that have won the hearts and minds of many Australians.

Over the years, the *Yellow Pages* brand has won many prestigious Australian and International creative awards. This includes eight awards at the Cannes International Advertising Festival, an achievement unprecedented in Australian advertising history.

It all began with the Goggomobile ad promoting the directory. Its popularity with consumers was overwhelming, with "G-O-G-G-O" becoming part of the vernacular. For many years the directory ads were the face of the *Yellow Pages* brand. Favourites include: Danny ripping up the *Yellow Pages* directory while packing to move; the man in his dinner suit standing under a leaking sprinkler; and the two men who use the *Yellow Pages* directory to stop their broken-down ute rolling back down the hill.

Each ad has helped to make the brand more likeable and more human. The characters portrayed are real, with all their foibles intact. It's advertising that customers can relate to.

A recent ad features a dog owner who discovers that his wayward dog has destroyed his home office (and his *Yellow Pages* directory). He turns to the *Yellow Pages OnLine* site for a solution.

Another favorite Australian ad hit our TV screens in 2000. Almost instantly, "Not Happy

evokes.¹⁵

For millions of Australians, the various *Yellow Pages* products are the first place they look when they need something. In short, it's a brand they love and trust.

¹ Sourced from PAMS database based on close of last canvass issue (021). ² Independent research of people aged 18-64 conducted by DBM consultants Pty. Ltd. Sydney, Melbourne, Brisbane, Adelaide, Perth, (AUG99-SEPT00) Hobart (APR99-MAR00) and 12 regional markets (FEB99-MAR00) ³ Independent research of people aged 18-64 conducted by DBM consultants Pty. Ltd. Sydney, Melbourne, Brisbane, Adelaide, Perth, (AUG99-SEPT00) Hobart (APR99-MAR00) and 12 regional markets (FEB99-MAR00) ⁴ Red Sheriff, Directory Category Ranking (Unique users July 2001) ⁵ Case study, "The Yellow Pages", Linden Brown, University of Technology, Sydney. ⁶ Independent research of people 18-64 conducted by DBM consultants Pty. Ltd. In Syd, Melb, Bris, Perth, Adel, Aug99-Sept00) Hobart (Apr99-March00) 12 regional markets (Feb99-March00) ⁷ Yellow Pages® Small Business Index, May 2000 ⁸ ABS, November 2000 ⁹ Red Sheriff, Directory Category Ranking (Unique users July 2001) ¹⁰ Pacific Access server log files June 2001 ¹¹ Based on Yellow Pages® Connect, average weekly call volumes May / June 2001 ¹² Red Sheriff, Directory Category Ranking (Unique users July 2001) ¹³ Scalar Science, October 1995 ¹⁴ Brand Building & Advertising effectiveness, The Yellow Pages® Story, Market Research Society of Australia, 1993. ¹⁵ Yellow Pages® Brand Audit, research conducted by Added Value (Melbourne), November 2000. ¹⁶ Case study, "The Yellow Pages", Linden Brown, University of Technology, Sydney. ¹⁷ Pacific Access server log files June 2001.

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THINGS YOU DIDN'T KNOW ABOUT YELLOW PAGES® DIRECTORIES

- The *Yellow Pages* directory used to be pink¹⁶.
- Over 6 million searches are performed on the *Yellow Pages OnLine* site each month¹⁷.
- The *Yellow Pages OnLine* site was established in 1994 making Pacific Access the first business directories publisher in the world to have an Internet site for business listings.