



## THE MARKET

In today's marketplace we are swamped with choice. There are more products and services than ever before. There are countless brands, countless places to get them and numerous ways to find, to compare and to wind up thoroughly confused.

New technology has also broadened the market for information. For instance, internet search engines allow you to search for anything, anywhere in the world. Where once printed directories owned the information marketplace - today online, telephony and printed media are all competing.

Muhammad Ali once said: "Wisdom is knowing when you can't be wise." It would not be wise to sort through all of today's information clutter and that is why the Yellow Pages® directory exists. It is there to help you find things quickly by bringing together buyers and sellers. The Yellow Page® brand is made up of directory, online and voice products to reflect the different information channels people use. Now you can find the products and services you are looking for wherever you are, and whenever you want.

## ACHIEVEMENTS

The logistics of servicing an almost billion-dollar directory market are astounding. The Yellow Pages® and White Pages® directories are produced by Sensis.<sup>1</sup> There are 78 Yellow Pages® directories produced nationally, including 6 major metropolitan directories, 22 local directories (with an extra two local directories being launched in 2004) and 50 regional directories covering even



the smallest country towns.

Inside the Yellow Pages® directory there are over 2,500 classified headings.

This translates to more than 57,500 individual pages of advertising which, when printed, become 21 billion pages, bound and delivered as over 15 million directories<sup>2</sup> - that's one directory to almost every home and business in Australia.

The Yellow Pages® brand is popular. Research shows that 73% of consumers surveyed between the ages of 18 and 64 in Australian metropolitan directory markets used the Yellow Page® directory in the month preceding the research.<sup>3</sup>

Furthermore, the yellowpages.com.au site is Australia's most visited online business directory<sup>4</sup> with over 1.4 million unique users visiting the site each month.<sup>5</sup>

Sensis decided to create the Yellow Pages® *Small Business Index* - a quarterly survey that measures the current

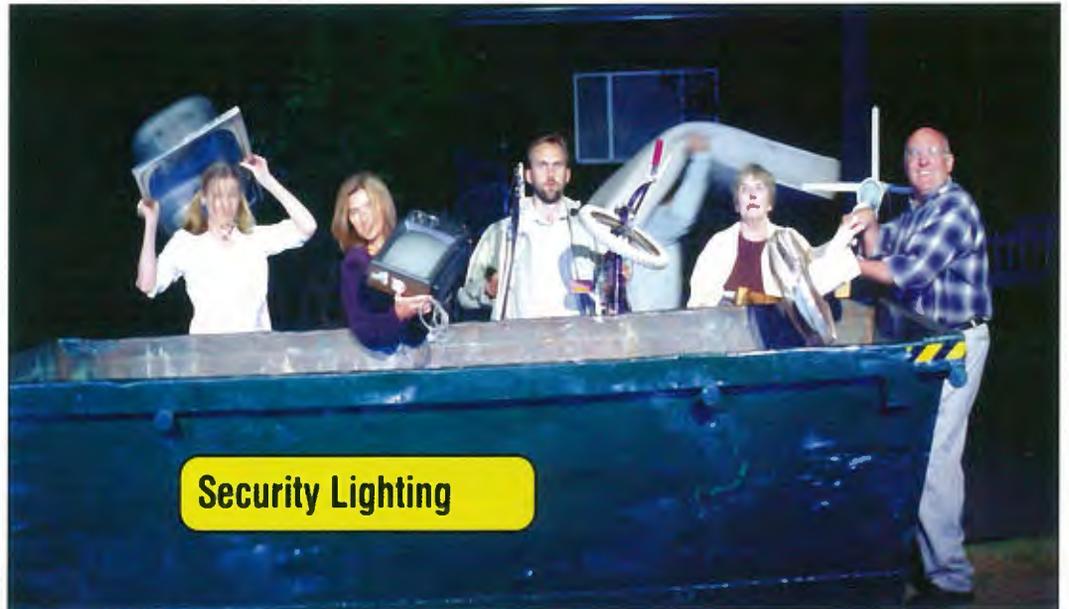
climate of small business and reports on projections for the forthcoming quarter. In 2000, the Yellow Pages® *Small Business Index* was expanded to include medium businesses, and in 2003 was re-branded as the Sensis™ *Business Index - Small and Medium Enterprises*. Today, the Sensis™ *Business Index* is accepted as a leading - and truly independent - barometer of business opinions for the SME sector of the Australian economy.

Similarly, the Yellow Pages® *Business Ideas Grants* program is one of a number of Sensis initiatives designed to support Australia's small and medium enterprises. It is an annual award program supporting new business ideas at the concept, product development and business development stages.

Another service Sensis initiated is the BookMuncher® *Directory Recycling Program* to ensure the responsible environmental management of old directories. The program enables residents and businesses to recycle their old White Pages® and Yellow Pages® directories through established council kerbside and commercial paper recycling collections. In 2002, a record 66 per cent of old directories were recycled through the program into environmentally friendly products such as cardboard packaging, kitty litter and housing insulation.<sup>6</sup>

## HISTORY

The world's first telephone directory was published in Connecticut in 1878, only two years after Mr Bell made the first telephone 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 soon required two comprehensive volumes.

The directory that became the Yellow Pages® directory officially began in 1924, except that back then it was actually pink. And all 40 pages were neatly contained within the standard telephone book. The first fully classified directories were launched in 1935 in Sydney and Melbourne. 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 directories.<sup>7</sup>

The Yellow Pages® OnLine site – the first online Yellow Pages® directory – was launched in 1994. New applications for the directory product did not cease there and the voice directory service, 'Hello Yellow', was launched in 1993 and it was renamed as the Yellow Pages® Direct service in 1997. This product was enhanced and relaunched at the end of 2000 as the Yellow Pages® Connect service.

## THE PRODUCT

The pace of life is getting faster and faster and as we become more time poor, new technology channels are attempting to provide us with more efficient ways of communicating and obtaining information. For example, over 10 million people, aged 14 years and over, own or use a mobile phone.<sup>8</sup> In addition, over 82 per cent<sup>9</sup> of all Australian businesses and 61 per cent<sup>10</sup> of all Australian households are connected to the Internet.

Despite all this change, people want to retain a sense of stability, they seek direction from trusted, familiar brands. In this context, the Yellow Pages® directory remains Australia's most trustworthy and reliable business directory.<sup>11</sup> In addition, the Yellow Pages® delivery channels have adapted to suit changed conditions.

The metropolitan directory still represents the foundation of the Yellow Pages® brand. The Yellow Pages® brand also extends to Yellow Pages® regional directories which cover the non-metropolitan areas of Australia, acting as an information source and buying guide for regional areas throughout Australia. Sensis also produces localised Yellow Pages® directories for 22 selected markets in Brisbane, Sydney and Melbourne with an extra two local directories in Adelaide and Perth being launched in 2004. The Yellow Pages® local directories are smaller and more compact than the normal directories making them easier to handle. They contain listings of local businesses, street maps and information pages relevant to their local community.

As consumers and advertisers are increasingly using the Internet, there is an opportunity to direct users toward the Yellow Pages® OnLine site. There are already over 1.4 million unique users who visit the yellowpages.com.au site each month.<sup>12</sup> The site enables consumers to locate and profile businesses 24 hours a day, 7 days a week.

Finally, the Yellow Pages® Connect service places the entire Yellow Pages® directory database a single phone call away. The Yellow Pages® Connect service 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. This national dial-up directory service currently provides approximately 112,000 referrals each week.<sup>13</sup> Watch this space as the Yellow Pages® Connect service is developed further to offer even more information options over the phone.



## PROMOTION

The Yellow Pages® brand is one of Australia's most loved and memorable brands. Research has shown that the Yellow Pages® brand is considered reliable, trustworthy and knowledgeable.<sup>14</sup> Due to the inherent nature of information giving, the Yellow Pages® brand risks being seen as dull and boring, dry and factual. The role of advertising is to counter-balance this by using humour to build the brand personality and engage the audience. Each ad has helped to make the brand more likeable and more human. The characters in the ads are not perfect and this enables us to relate to them and in a sense, laugh at ourselves.

Many Australians fondly recall consistently humorous and creatively outstanding Yellow



Pages® ads. Over the years, the Yellow Pages® brand has won many prestigious Australian and International creative awards. These include 8 awards at the Cannes International Advertising Festival, an achievement unprecedented in Australian advertising history. The Yellow Pages® brand has also been a dominant outdoor advertiser in the past few years. Executions promoting the headings in the Yellow Pages® directory and Yellow Pages® OnLine service have illustrated innovative use of the medium with campaigns recognised at Cannes, the New York Festival and other award shows.

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 everyday language. 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 man who uses the Yellow Pages® directory to stop his broken-down ute rolling backwards down the hill.

Perhaps the most famous Yellow Pages® ad was "Not Happy, Jan", the commercial was so popular that the phrase became part of the vernacular. The campaign's effectiveness was recognised in the Advertising Federation of Australia's Effectiveness Awards in 2003 where it was a finalist.

Two recent commercials include 'Skip' and 'Dog'. 'Skip' shows a man who has hired a skip for his re-decorating rubbish and who later discovers that his neighbours are making full use of it. After consulting the Yellow Pages® directory, late one night he puts an end to this freeloading by installing a high-powered security floodlight system.

In 'Dog', we see a man and his dog taking their daily walk around the suburbs. As part of this everyday ritual our canine friend has made a habit of defecating on one of his neighbour's pristine lawns. After many clean-ups the lawn owner spots the perpetrator and consults the Yellow Pages® directory to find an appropriate deterrent – a remote activated sprinkler system.

The follow-up campaign to 'Not Happy, Jan' explores the ridiculous lengths people go to when trying to remind themselves to do things. It includes a woman leaving herself a number of phone messages to remind herself to place her ad in the Yellow Pages® directory. Another commercial features an overly confident businessman, who walks through a door and a Yellow Pages® directory falls onto his head as a reminder to book his advertising.



## BRAND VALUES

The overwhelming fondness that users feel for the Yellow Pages® brand is reflected in the array of attributes that they readily associate with the brand. Consumers see it as helpful, genuine, and down-to-earth.<sup>15</sup> For millions of Australians, the various Yellow Pages® products are the first place they look when they need anything. In short, it's a brand they rely on and trust.<sup>16</sup>

1 Formerly Pacific Access Pty Ltd. Sensis has responsibility for the conduct of certain attribution relating to the Yellow Pages® and White Pages® products and services on behalf of Telstra Corporation Limited. 2 Yellow Pages® directories. Publication year 2001. 3 Independent research of people aged 18-64 conducted by TNS in Sydney, Melbourne, Brisbane, Adelaide, Perth Metropolitan Directory Markets (November 2002 to August 2003). 4 Red Shovel Directory Category Ranking (Unique Users August 2001). 5 Red Shovel, Customer Intelligence (Unique Users May 2001 - July 2001). 6 Vay Recycling, January 2001. 7 Case study, "The Yellow Pages", London: Brown, University of Technology, Sydney. 8 Ray Morgan, Single Source Australia July 2002. 9 Yellow Pages® Small Business Index, July 2001. 10 ABS September 2001. 11 Independent Research of people aged 18-64 conducted by TNS in Brisbane, Melbourne, and Sydney metropolitan markets, September 2002 to August 2003. 12 Customer Intelligence (Unique Users May 2001 - July 2001). 13 Based on the Yellow Pages® Connect service, average weekly call volume July/August 2003. 14 Independent Research of people aged 18-64 conducted by TNS in Brisbane, Melbourne, and Sydney metropolitan areas, September 2002 to August 2003. 15 Independent Research of people aged 18-64 conducted by TNS in Brisbane, Melbourne, and Sydney metropolitan markets, September 2002 to August 2003. 16 Independent Research of people aged 18-64 conducted by TNS in Brisbane, Melbourne, and Sydney metropolitan markets, September 2002 to August 2003. 17 Case study, "The Yellow Pages", London: Brown, University of Technology, Sydney. 18 Red Shovel, Customer Intelligence (Unique Users May 2001 - July 2001). © and TM Registered trade mark and trade mark of Telstra Corporation Limited.

## THINGS YOU DIDN'T KNOW ABOUT YELLOW PAGES DIRECTORIES

- The Yellow Pages® directory used to be Pink.<sup>17</sup>
- More than 1.4 million unique users visit the yellowpages.com.au site each month.<sup>18</sup>
- The Yellow Pages® OnLine site was established in 1994 making Sensis the first business directories publisher in the world to have an Internet site for business listings.