Destination: Growth
Breaking down barriers

Antonio Alonso
President & Chief Executive Officer
CBS Outdoor International

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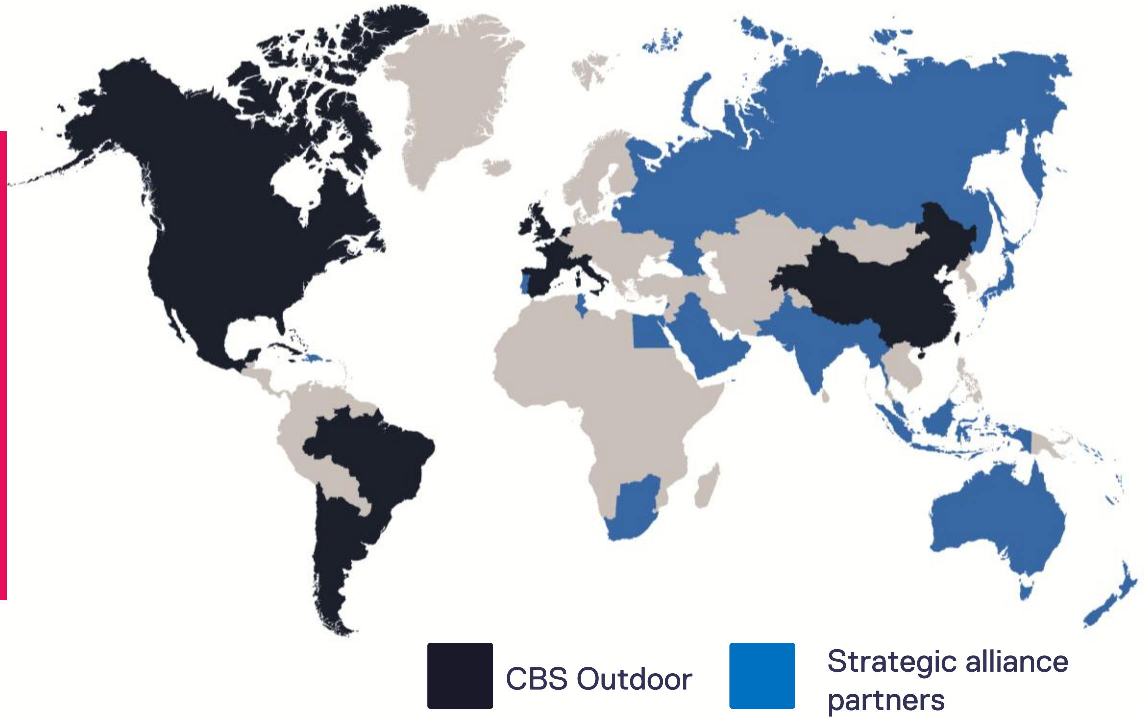
CBS Outdoor International

- audience-led proposition
- insights as a strategic pillar
- digital leader
- the future is interactive

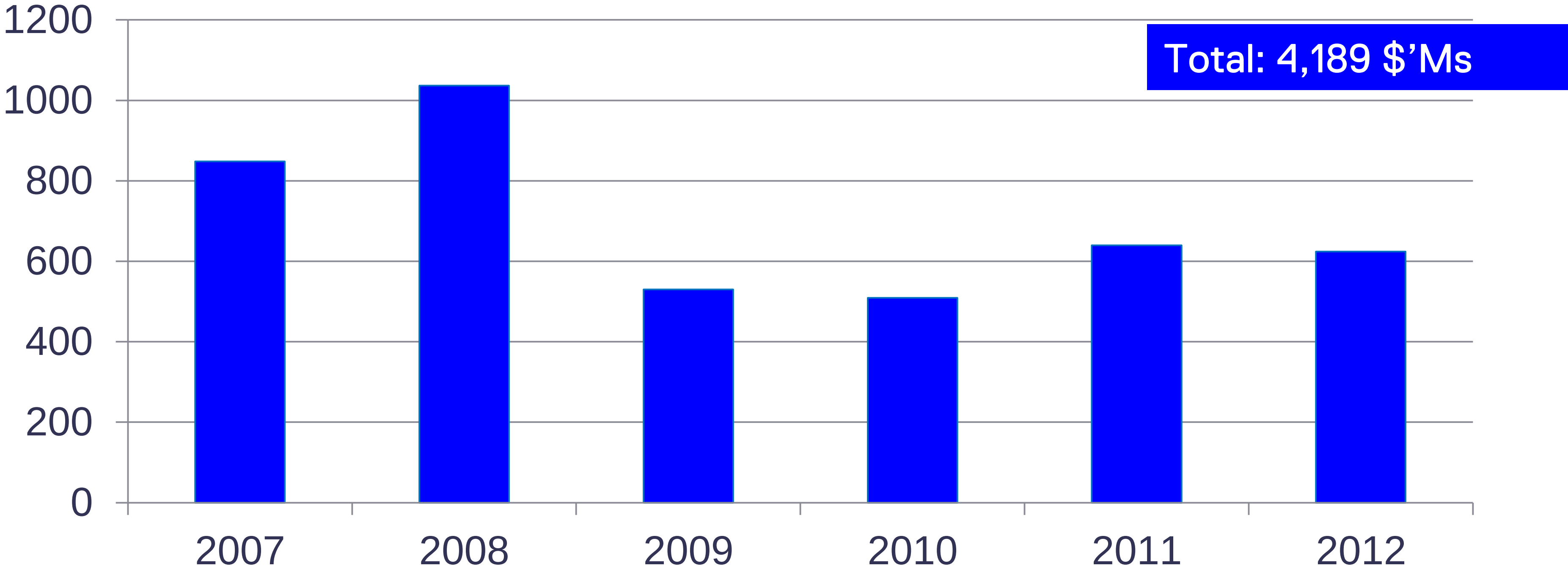


The challenge of growth:

A view of growth

Grow YOY	Grow more than inflation	Grow more than other media	Grow our margins
=	=	=	=
Nominal growth	Value creation	Share gain	Return On Investment

Capex invested by key OOH companies ($'Ms)

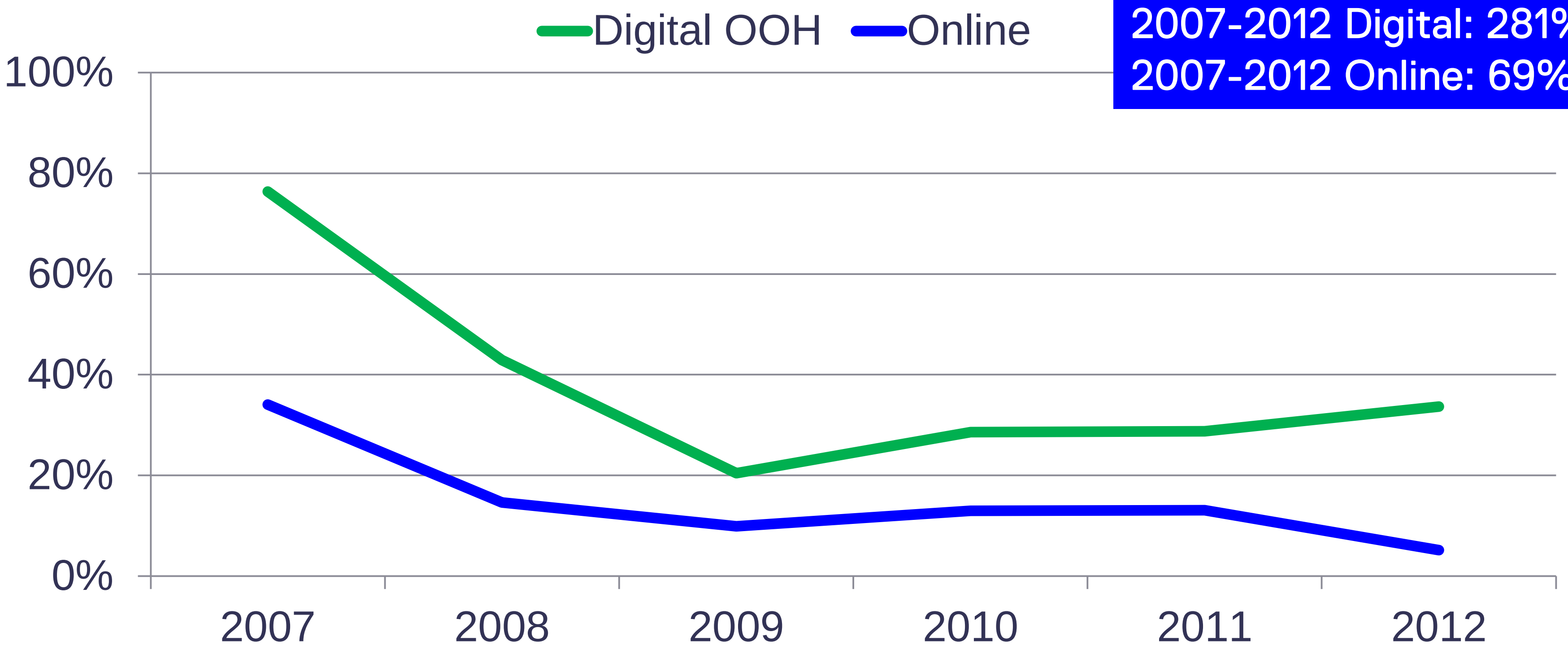


Leading companies , increasingly committed

Source: Annual reports and Form 10-Ks

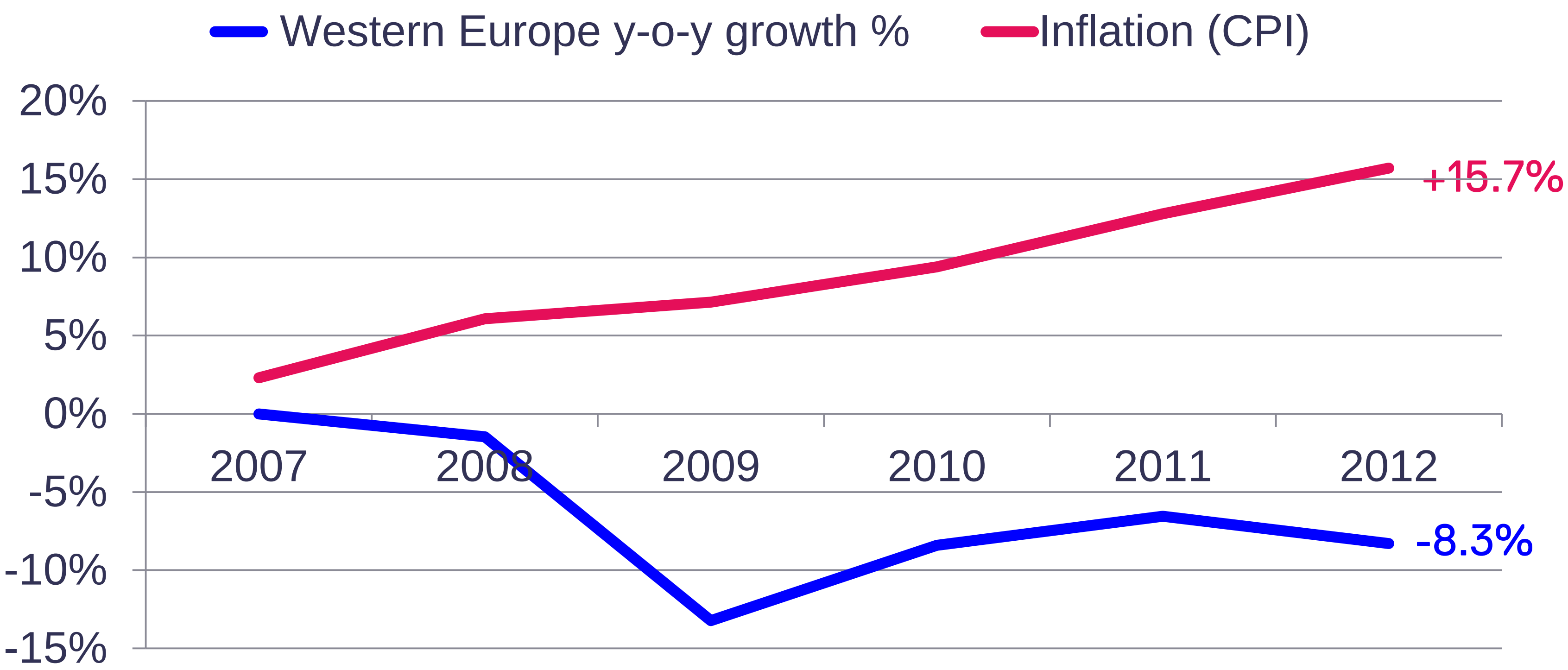
Good news: DOOH fastest growth medium

2007-2012 Digital: 281%
2007-2012 Online: 69%



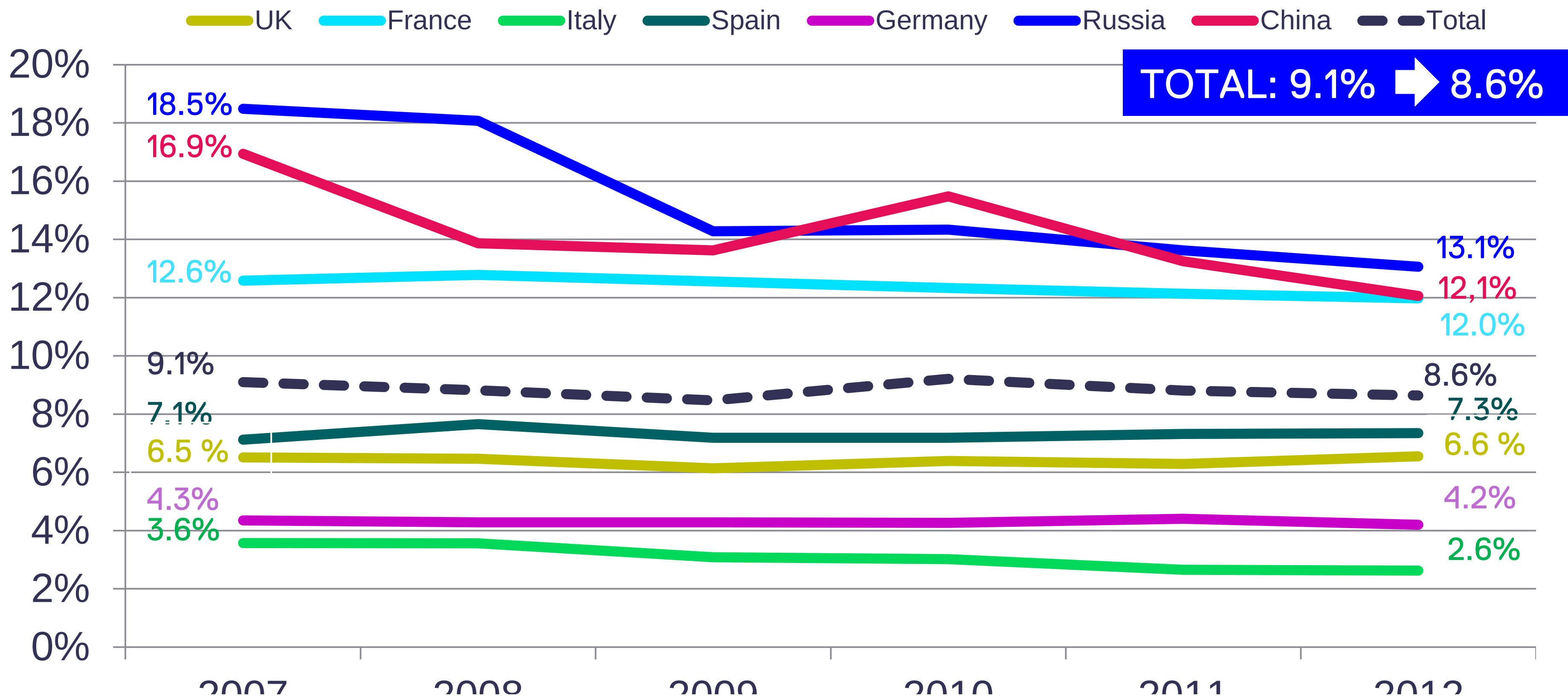
Source: IHS Screen Digest, Goldmedia, OMC – April 2013

OOH growth in Western Europe vs. Inflation rate growth



Source: Zenith Optimedia April 2013. Eurostat Union (changing composition) HCPI

OOH spend as a % of total advertising spend



Source: Zenith Optimedia December 2012 report. Ad spend at current prices

Strategies for growth:

Better practices
=
operational excellence

Change the dialogue:
from panels to
audience

And change it again:
from audience to

consumers

Internationalisation =
knowledge/synergies

Interactivity =
engagement

Digitalisation =
capacity x flexibility x
creativity

Consolidation =
cost synergies =
margin growth

Audience: a common view?

Different systems in different countries

Is a common system/methodology a dream?

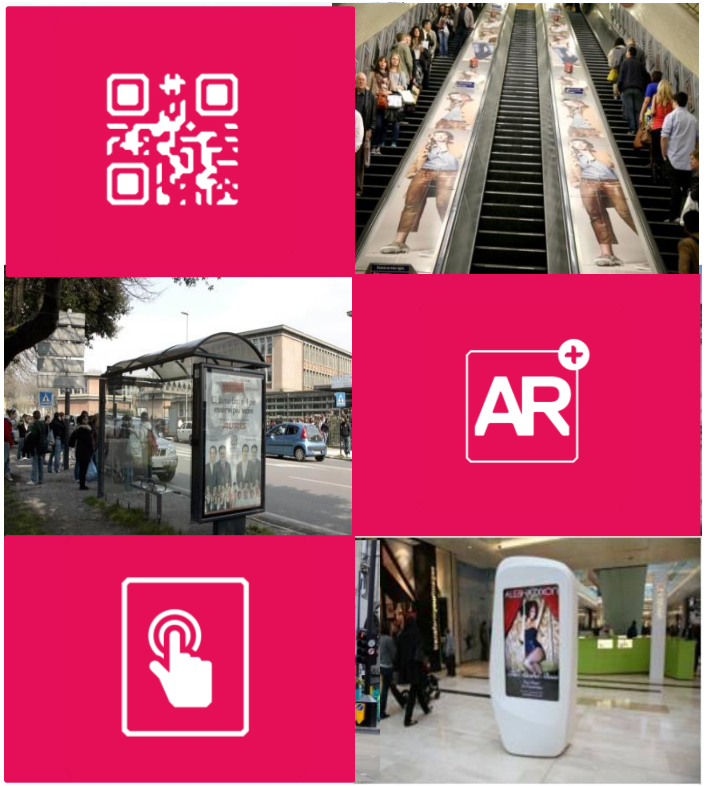
How will we use audience to build our products?

Technology: the key driver of growth

Yes, but.......HOW?

Interactivity: CBS Outdoor view

- Enhanced advertising campaigns
- Direct marketing
- Content distribution
- E-Retail accelerator



Interactive Europe: key findings

INTERACTIVE EUROPE

OOH is still driving a response

77% of people reported doing something as a result of seeing Out-of-Home ad

24%

Made a purchase as a result

20%

Went online to buy a product (up 43% on 2012)

OOH performing against other mediums

Out-of-Home 77%
TV 76%

Out-of-Home 77%
Radio 63%

Smart device ownership

- Up 34% on 2012
- 1.5 billion handsets by 2017
- NFC awareness at 8%

NFC

Interactivity – drives deeper levels of engagement

Insight across the three campaigns

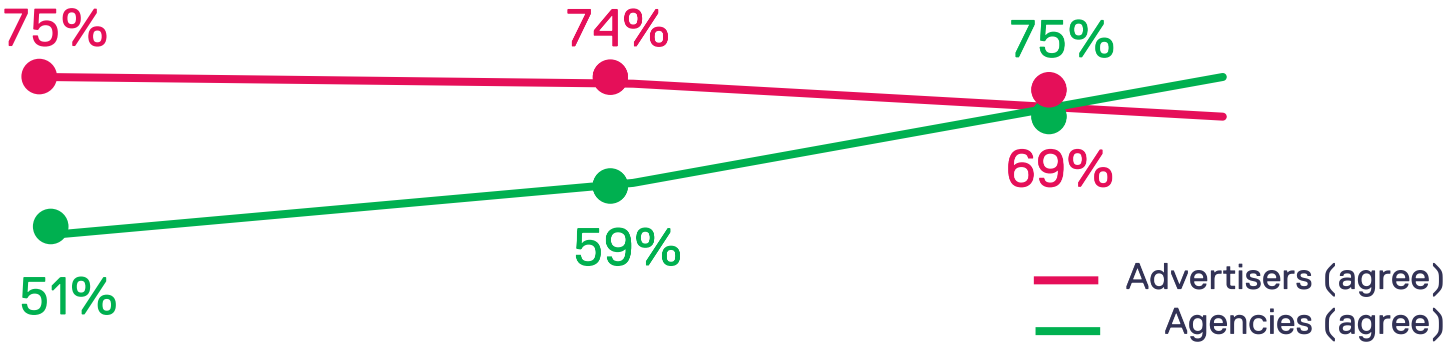
45%
Average uplift in terms of the ad being ‘for people like me’

54%
Average uplift in terms of being likely to mention the advertising in conversation

45%
Average increase in terms of ‘having a better opinion of the brand’

Halo
People who watch others interact will think more positively about the brand

The challenge: the advertisers' view



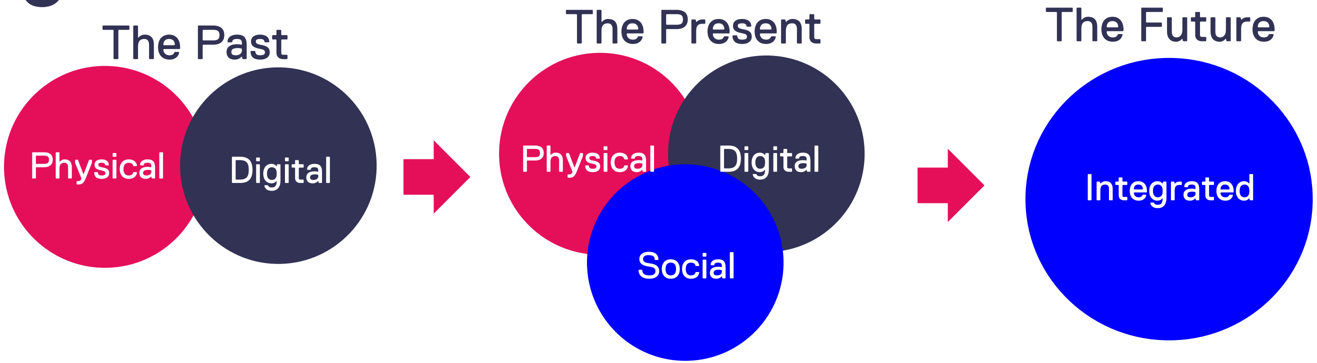
Agencies are not set up in the right way to be able to deliver (sell) a truly integrated marketing plan

Direct dealings between advertisers and media owners is set to increase

Media Owners are not set up and organised to deliver new and different ways to connect with consumers

Source: Survey presented at Festival of Global Media 2013

The challenge: evolution of commerce



	2000	2013	2020
Global Media Consumption week	60 hours	75 hours	90 hours
%Media Consumers Digitally	15%	67%	80%
%Global Mobile penetration	12%	90%	93%
Digital Commerce	$256 Billion	$ 1.25Trillion	$2.00 Trillion

Source: Survey presented at Festival of Global Media 2013

The profitable growth

Landlords
relationships

Agencies to understand
our margins

Our people to understand
profitability concepts

Optimization
of audiences

Technology
return on investment

Selling better
=
Selling more

This is the biggest transformation of Out-of-Home ever

Let's take advantage of it


LOS PITUFOS
EN 3D 29 DE JULIO


NEVER HIDE
ALL TOMORROWS LEGENDS
NEVER HIDE
Ray-Ban

Thank you


MATT DAMON
LE 23 MARS
SNCF


CONVERSE


BOUTIQUES VANS PARIS: