Prospects and Perspectives

Jeremy Male CEO@JCDecaux
Fepe elects a new chairman...
“Once a new technology rolls over you, If you're not part of the steamroller, you're part of the road”

Stewart Brand
CREDITORS POISED TO SEIZE HIBU

Phonebook publisher Yellow Pages could fall into the hands of hedge funds, banks and bondholders within weeks under a sweeping debt overhaul.

Creditors are poised to seize control of Hibu, the Reading-based owner of Yellow Pages, in a deal which would wipe out shareholders and more than halve its £2 billion debt pile, The Sunday Times reported.
A Two Speed World.

Source: Zenith Media March 2012
Outdoor in Europe.

Source: Zenith Media March 2012
Prospects.

Audience

Product Investment

Connectivity

Research
What’s Happened Since Last Year?

![Graph showing stock performance from January 2012 to June 2013. The graph compares two lines: the blue line represents JCD CCO Lamar Ströer, and the red line represents DJ EuroMediaStoxx. The graph shows a general upward trend in stock performance over the period.]
Perspectives
2013.

Presence

Quality

- facebook

- facebook
Presence

- +

Quality

- +

Facebook

2013.

OUTDOOR
What’s Trending?

1. Big Data/Insight
2. Mobile
3. Content/Engagement
4. Rise of the Machines/New Trading Methods
What’s Trending?

1. Big Data/Insight
Route.
Seat at the Table

- Norway: 2008
- Sweden: 2005
- Finland: 2006
- Germany: 2008
- Slovenia: 2008
- Austria: 2012
- Ireland: 2005
- Northern Ireland: 2009
- Spain: 2000
- France: 1990, 2001
- Italy: 2004
Adding Value.
Media Agency Review. 2013 Trends.

1. Big Data/Insight
2. Mobile
Mobile.

Outdoor

- 2011: £886m
- 2012: £914m
- 2013: £950m

Mobile

- 2011: £203m
- 2012: £526m
- 2013: £975m
Objective:
Achieve annual targets by increasing footfall to stores.
Result.

33,000 coupons delivered

15.5% year-on-year sales uplift

18% rise in Google searches for Krispy Kreme
What’s Trending?

1. Big Data/Insight
2. Mobile
3. Content/Engagement
JCDecaux Digital.

6% of Group Revenue
13% of Transport Revenue
19% of UK Revenue
Content - Digital.
Content - Analogue.
Content - Analogue.
London 2012.
New World of Engagement.
New World of Engagement.
What’s Trending?

1. Big Data/Insight
2. Mobile
3. Content/Engagement
4. Rise of the Machines/New Trading Methods
Programmatic Buying.

Choose media source
Set up Banner
Review and activate campaign

TARGETING
- COMPANY
  - John Lewis
  - Wickes
  - B&Q
  - Homebase

- Viewed Baths
- Viewed Kitchens
- Viewed Doors
- Viewed Roofs

Booked Appointment
Did not Book Appointments

SCHEDULE
- START DATE: 02-Jun-2013
- END DATE: 02-July-2013

NEW APPOINTMENTS MADE: 108

IMPRESSIONS TARGET
0 30,000 60,000

29,653 IMPRESSIONS
£0.32 CPM
£9,488.96 TOTAL COST
Perspectives.

1. Big Data/Insight 🟢🟢🟢
Perspectives.

1. Big Data/Insight
2. Mobile
Perspectives.

1. Big Data/Insight ✔️ ✔️ ✔️
2. Mobile ✔️ ✔️
3. Content/Engagement ✔️ ✔️ ✔️
Perspectives.

1. Big Data/Insight ✓ ✓ ✓
2. Mobile ✓ ✓ ✓
3. Content/Engagement ✓ ✓ ✓
4. Rise of the Machines/New Trading Methods
People & Mindsets
People and Mindsets.
People and Mindsets.
People and Mindsets.

2005  2010  2015

Product  Audience + Data
People and Mindsets.

- **Product**
- **Audience + Data**
- **The GLUE in a Virtual World**

<table>
<thead>
<tr>
<th>Year</th>
<th>Description</th>
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<tbody>
<tr>
<td>2005</td>
<td>Product</td>
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<tr>
<td>2010</td>
<td>Audience + Data</td>
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<tr>
<td>2015</td>
<td>The GLUE in a Virtual World</td>
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<tr>
<td>2020</td>
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People and Mindsets.
Media Anomaly 1: Press

7% Time

20% Spend
Media Anomaly 2: The Internet

33% Time
20% Spend
‘Outdoor about Right.’
Media Anomaly 3
18% Time
8% Spend
Breaking Down Barriers.
Thank You