

What's trending in OOH in Asia

Ron Graham

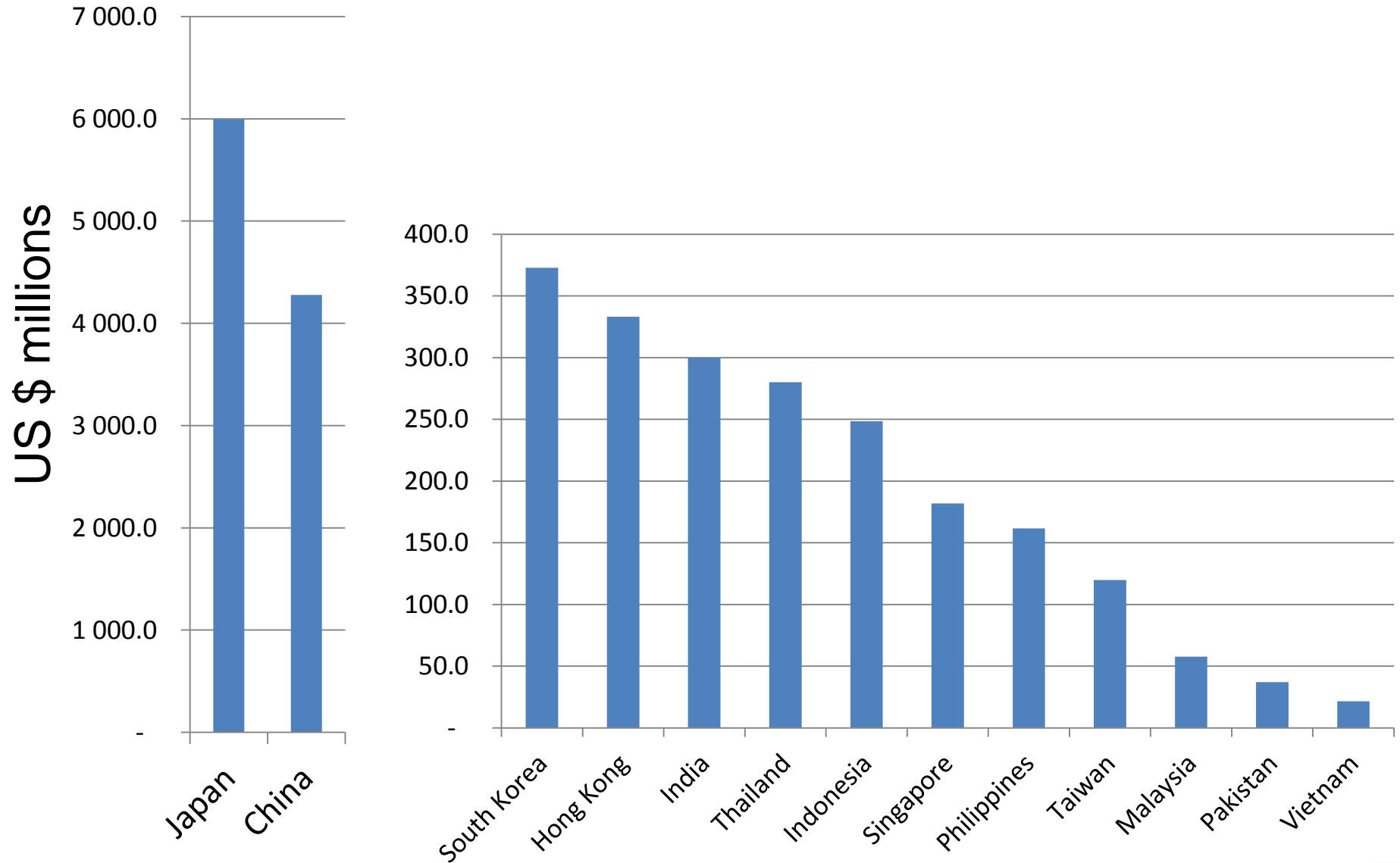
Media On The Go



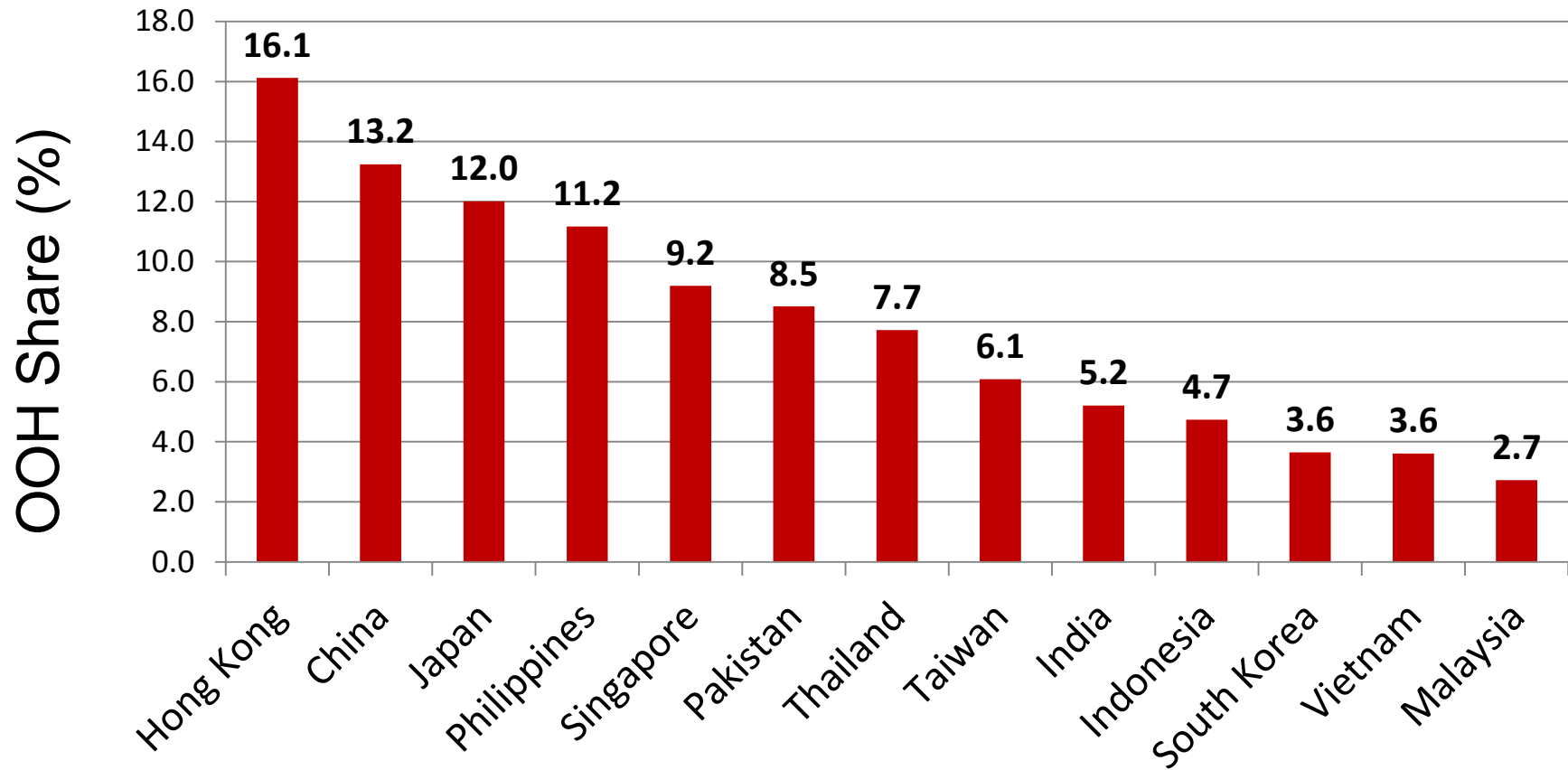
Asia OOH Market Size & Share

(US\$m)	Total 2011	Outdoor	Share
Japan	49,949	5,995.7	12.0%
China	32,299	4,277.8	13.2%
South Korea	10,232	372.9	3.6%
Hong Kong	2,067	333.2	16.1%
India	5,757	300.0	5.2%
Thailand	3,625	280.0	7.7%
Indonesia	5,246	248.5	4.7%
Singapore	1,979	181.9	9.2%
Philippines	1,446	161.6	11.2%
Taiwan	1,970	119.9	6.1%
Malaysia	2,125	57.8	2.7%
Pakistan	436	37.1	8.5%
Vietnam	596	21.5	3.6%
Asia (total)	117,726	12,388	10.5%
Zenith MediaFact			

Asia OOH Market Values (US\$ m)



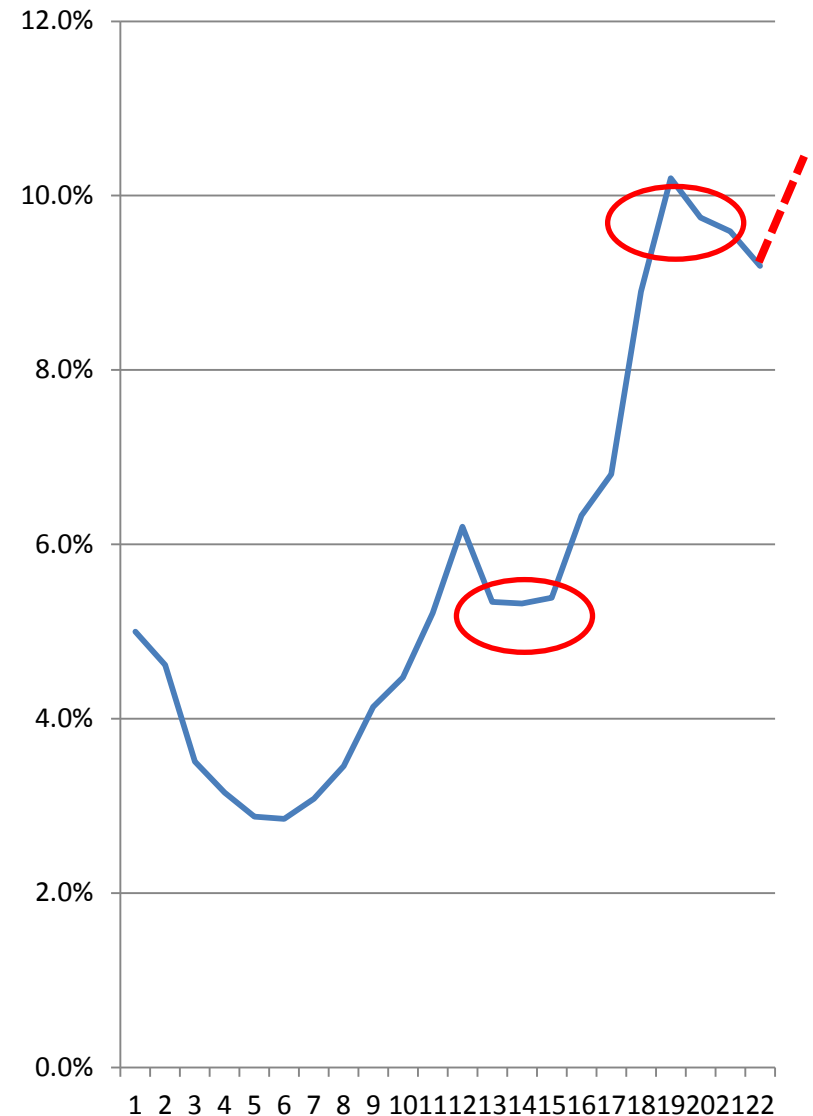
OOH Market Share (%)



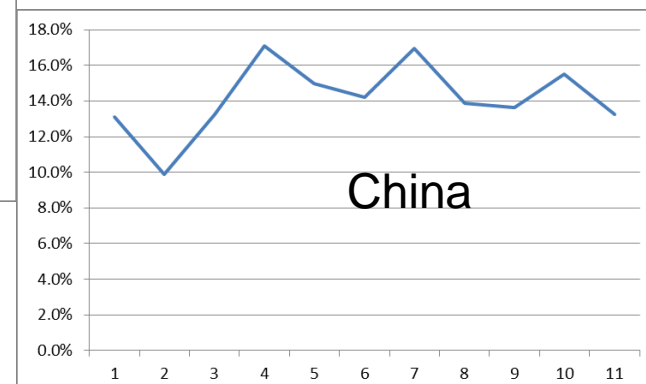
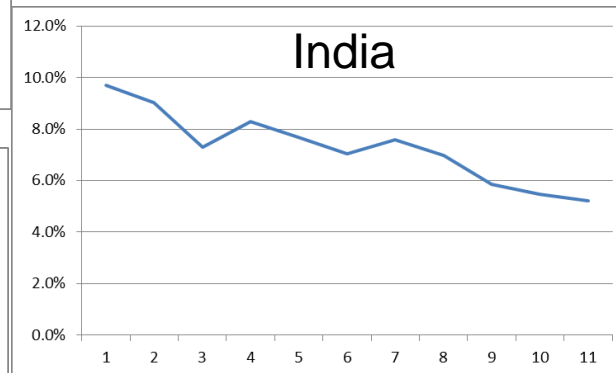
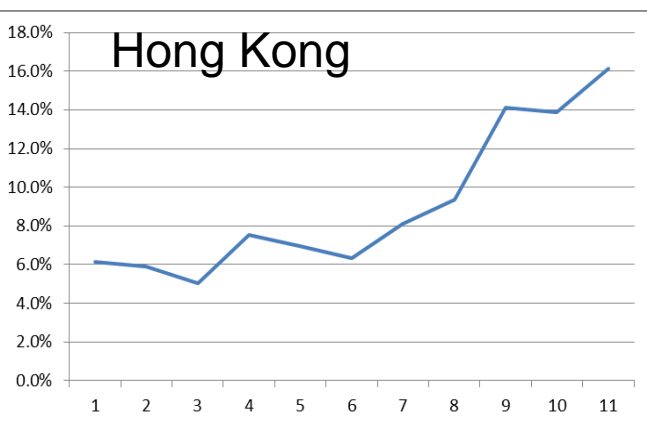
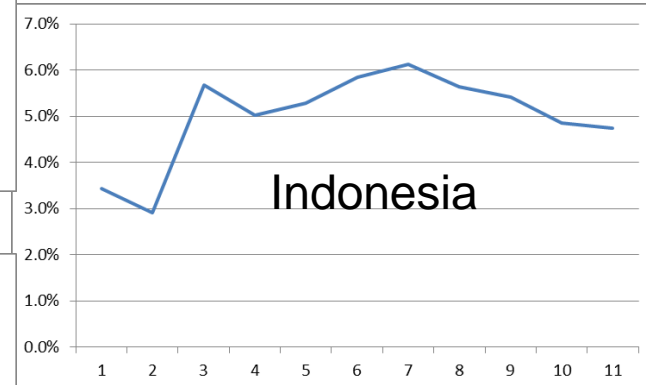
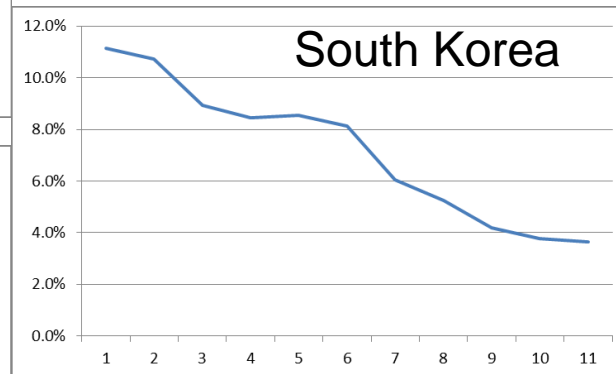
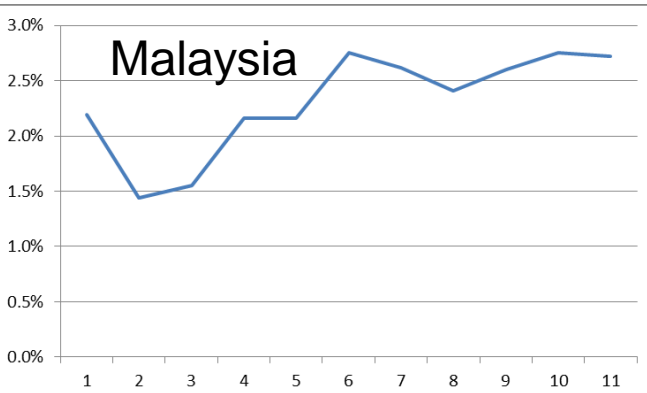
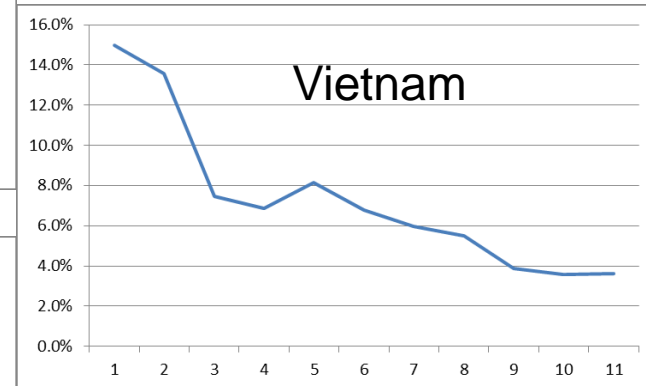
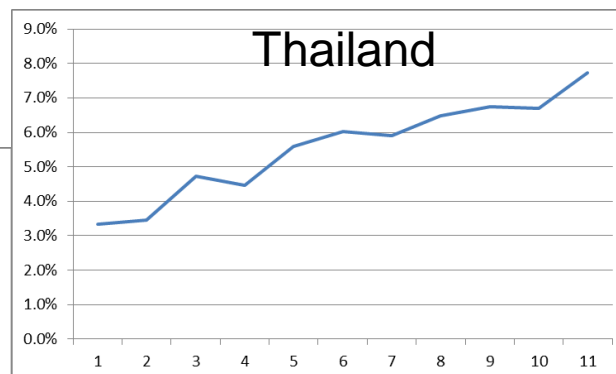
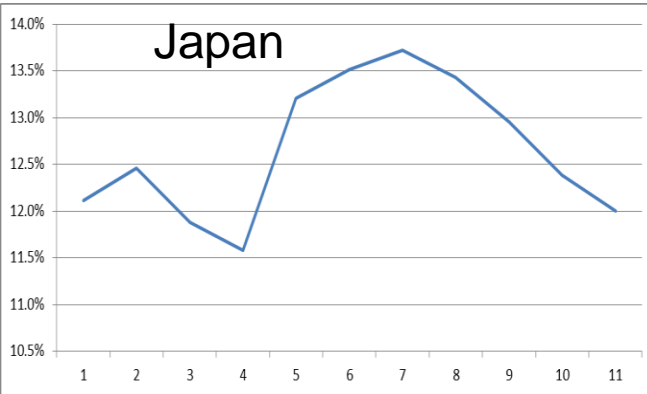
“J” Curve or “W” Curve

Singapore

- Classic J-Curve (past 22-years)
- Historically established share
- Decline due to TV & cable
- Improved by infrastructure
 - mass transit & bus shelter concessions
- Maturing of OOH product offering
- Correction of 2002 recession (SARS)
- Correction after boom in 2008
- 2012 results now above 10%



10-year Trends



Digital OOH

Top 3 global DOOH markets in 2012, (PQ Media):

1. USA with \$2.17 billion in operator revenues
2. China at \$1.72 billion
3. Japan with \$789 million

China DOOH \$1.72 bn.

> 30% of total OOH revenue

China DOOH

Focus Media China

Price (12/31/11)	Price (12/31/12)	Price (3/20/13)	US\$ Mkt Cap (mil.)
19.49	25.67	26.16	3,746

- China's biggest ever leveraged buyout
- Deal confirms value of the company at \$3.7 billion
- Total revenue in 2012 US\$ 927.5 m
- Revenue growth (over 2011) 18%
- Total LCD Screens (as at 31-12-12) 172,326
- Total Poster Frames (as at 31-12-12) 541,912

China DOOH

Price (12/31/11)	Price (10/12/12)	% Chg. Oct '12	Price (3/20/13)	US\$ Mkt Cap (mil.)
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Vision China Media

1.24	0.21	- 83%	3.70	205
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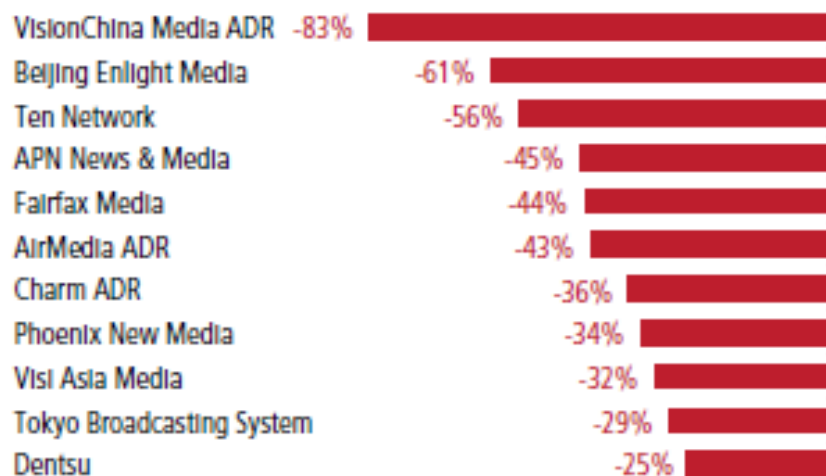
Air Media China

3.63	2.06	- 43%	1.89	11
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2012 LOSERS

% YTD Chg*



* As of October 12, 2012 close
Source: MPA analysis

Source:
Asia Media Journal

China DOOH

- Big 3 DOOH companies are all in the business of:
 - Small screens
 - Interiors
 - Place-based
 - Networks
- Successful based on:
 - Scale
 - Mass Audience
 - Excess demand for broadcast media
 - Long term investment

Asia
likes
LED



Landmark locations
(not networked)
Sold long term
(not tactical)



The World's Longest LED Media Façade



Taman Anggrek, Jakarta, Indonesia

Development Strategies

- Plan-B Thailand: Bus Media Operator
- Strong sales track record & profit
- Growth Plan:
 - more OOH formats
 - DOOH
 - concessions
- Offer 30% equity for US\$30m
- Acquired by Emtek (Indonesian TV Media)



Regulatory

- Da Nang City People's Committee, Vietnam
- Amenity / Function / Landscaped / Aesthetic
- Civic theme: sea, boats, birds
- Win-Win

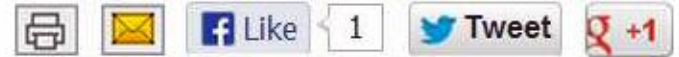


Breaking Down Barriers

- Asia is different
- Barriers of; Language / Culture / Corruption
- OOH industry checkered track record

Delhi High Court quashes JC Decaux contract

By afaqs! news bureau, afaqs!, New Delhi,
April 09, 2013 Section: News Category: OOH News



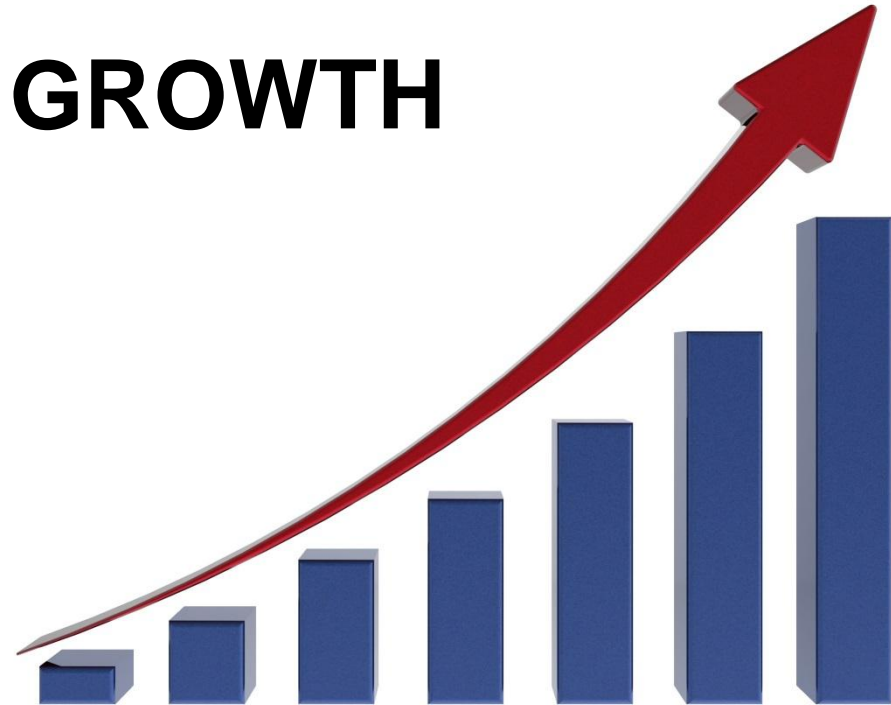
The High Court of Delhi has directed JC Decaux to surrender all the bus shelters in the capital that it won just nine months ago.

The High Court of Delhi has recently quashed the decision of the Delhi Transport Infrastructure Development Corporation Ltd (DTIDC) and the Government of National Capital Territory of Delhi to award the contract for several hundred bus

Asia = Opportunities

- Infrastructure:
 - Toll Roads
 - Airports
 - Mass Transit
 - Street Furniture
 - Transport
- Demand
 - Expertise
 - Investment
- Growing consumerism
 - Increased adspend

GROWTH



Thank You

Questions

