

Airport Stories World by JCDecaux Airport

Airports, a growing global arena for brands.

Out of Home
Media

Paris, 29 November 2011 –JCDecaux SA (Euronext Paris: DEC), the number one outdoor advertising company worldwide, has unveiled the results of the “Airport Stories World” survey.

JCDecaux is the world number one in airport advertising with access to all major international hubs: Beijing, London, Los Angeles, Paris, Dallas, Frankfurt, Hong Kong, Dubai, New York, Singapore and Shanghai. JCDecaux’s network reaches a monthly audience of more than 125 million passengers around the globe.

JCDecaux wanted to find out how passengers experience brand communication in airports and commissioned a preliminary study in France in 2010, working with OpinionWay. Following these initial findings, JCDecaux launched a worldwide research study, to better understand how passengers live the Airport Experience across the globe. The study also investigated the role of advertising in creating added value for brands in a world of increasing communication channels ranging from premium giant formats, digital and mobile devices to earned media.

International frequent flyers demand more intimate relationships with brands

The key finding from the Airport Stories World research is that consumers are ready for even more engaging advertising solutions. JCDecaux’s expertise has already led to the introduction of charging stations, digital interactive networks, touch screens and sponsored game zones. These are not only opportunities for advertisers but are welcomed by passengers who actively seek a more intimate relationship with brands: *“A brand that can give me the right service at the right time will create a lasting impression.”* (passenger, UAE).

Synergy is crucial between brands and services to create a genuine brand association and to generate earned media from services such as free Wi-Fi access - welcomed by 77% of respondents.

Airport Stories reveals the powerful brand engagement that is delivered by digital media. At airports passengers have time to interact with digital media and welcome the opportunity to download content and to connect with the brand. The study showed that:

- **66%** want to download entertainment,
- **61%** want to download offers and coupons.

The research underlines the key role airport advertising plays in creating online dialogue as passengers are increasingly keen to interact with brands: *“Airport advertising catches your attention because you can often interact live with the screens.”* (passenger, USA).

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International passengers have broadly similar attitudes towards brands and advertising in airports – with only minor cultural differences

This trend differs from other media and may be because passengers believe that advertising belongs in airports. This can be explained by the fact that airports tend to arouse strong emotions, producing a polarised experience of stress and anxiety on the one hand, mainly due to security processes and a crowded environment, contrasted on the other hand, with very positive feelings of excitement and pleasure. The study shows that passengers' first desire after check-in is "to let themselves go". They are quickly in a mood for shopping, discovery and relaxation, and they tend to feel they are in a very different place: *"It is somehow different from my everyday life; completely out of the ordinary"* (passenger, France). This mindset enhances the advertising for brands as it contributes to more openness: *"Every time I travel, I am thinking about the new experiences I am about to have"* (passenger, UK).

From a rational perspective, this phenomenon is also influenced by the vast infrastructure of airports, the feeling of mobility and the excitement they generate:

"I am really excited about what's here." (passenger, Singapore).

This unique experience creates a relationship between advertising and brands. Airport advertising creates a Universal Brand Experience.

- **91%** agree that brands benefit from advertising in airports.
- **86%** think airports are a good place for brand trial & sampling.
- **85%** enjoy airport advertising and this claim is frequently mentioned by passengers:
 - *"Without the ads, the airport would be stark and boring."* (passenger, USA)
 - *"If there were no ads, the airport would lose part of its creative edge."* (passenger, UK)

Airport advertising is a key accelerator for communication strategies

Airport advertising enhances powerful brand perceptions across very different markets: "You feel it is a powerful brand" (passenger, UAE).

In mature markets (Germany, UK, USA) advertising is expected to be more functional, offering engagement, sponsored & connected services. In emerging markets (China, Singapore, UAE) advertising is more emotive, used to launch new brands and products.

Airport advertising increases brands' international status for 92% of respondents, modernity for 84%, while 84% agree that airport advertising helps brands increase sales.

Jean-Charles Decaux, JCDecaux Co-Chief Executive Officer, said: *"As the n°1 outdoor advertising company worldwide, JCDecaux is well-positioned to provide thought leadership and insight into the unique airport experience. Airport Stories confirms that consumers actively seek more engaging opportunities with brands and gives a deeper understanding of how to communicate with the passenger. Airport Stories reveals new synergies that harness the latest trends in social media and complement our digital, experiential and traditional airport offers."*

Methodology

Airport Stories is the very first in-depth survey spanning the airport medium on four continents. It employs a unique methodology to analyse perceptions and expectations of a universal audience, the international frequent flyer:

- 8 major airport hubs across Europe, Asia, USA and Middle East,
- in Hong-Kong, Shanghai, Changi, London Heathrow, Paris, Frankfurt, Dubai and New-York JFK airports.

The project combines qualitative and quantitative stages to deliver full and comprehensive insights:

- Voxpops interviewing and filming passengers inside the airport,
- Focus groups consisting of 'exploratory' meetings in each country,
- Online survey to confirm passengers' perceptions and expectations towards brand communication in airports.

The study consisted of nearly 1600 respondents and 6 focus groups.

Reminder - Global air travel forecast (source Airbus GMF 2011)

- Passenger traffic will double in the next two decades: from 5 billion passengers/year in 2010 to 11 billion in 2030)
- In 2030, 44 million passengers will fly daily (vs 14 million in 2011)
- Passenger aircraft fleet will grow from 15,000 in 2011 to 31,500 by 2030
- Nearly three quarters of the world's air traffic passes through just 114 airports (out of more than 2,300) and there will be over 150 new airports by 2030
- This is nearly one new airport opening every 6 weeks between 2011 and 2030.

Key Figures for the Group:

- 2010 revenues: €2,350 m; revenues first nine months 2011: €1,747.1 m
- JCDecaux is listed on the Eurolist of Euronext Paris and is part of the Euronext 100 and Dow Jones Sustainability indexes
- No. 1 worldwide in street furniture (427,200 advertising panels)
- No. 1 worldwide in transport advertising with 184 airports and nearly 300 contracts in metros, buses, trains and tramways (369,900 advertising panels)
- No. 1 in Europe for billboards (226,700 advertising panels)
- No. 1 in outdoor advertising in the Asia-Pacific region (239,600 advertising panels)
- No. 1 worldwide for self-service bicycle hire
- 1,023,900 advertising panels in more than 50 countries
- Present in 3,600 cities with more than 10,000 inhabitants
- 9,940 employees

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