

# 中国媒体概览 China Media Overview



OOH



## Summary :

- As a special media, OOH advertisement will not only bring commercial effect, but also public effect into the entire city or even broader range.
- Public transportation has been the focus of OOH advertisement in recent years. With the increasing penetration rate of OOH video advertisement, the media transforms from conventional to LCD TV and from public to specific audience categorized by community.
- Though the growth of advertisement release has been stabilized but still retain over 20% annual increase. Cinema and bus advertising are the major choices for advertisement release in 2015. Videos in supermarkets or subways are booming as media for advertisement release.
- Tier 1 city is still the primary market for OOH advertisement release. However, media channel would keep penetrating into tier 2 and tier 3 cities as a result from the saturation of tier 1 city market as well as the media expansion in tier 3 cities.

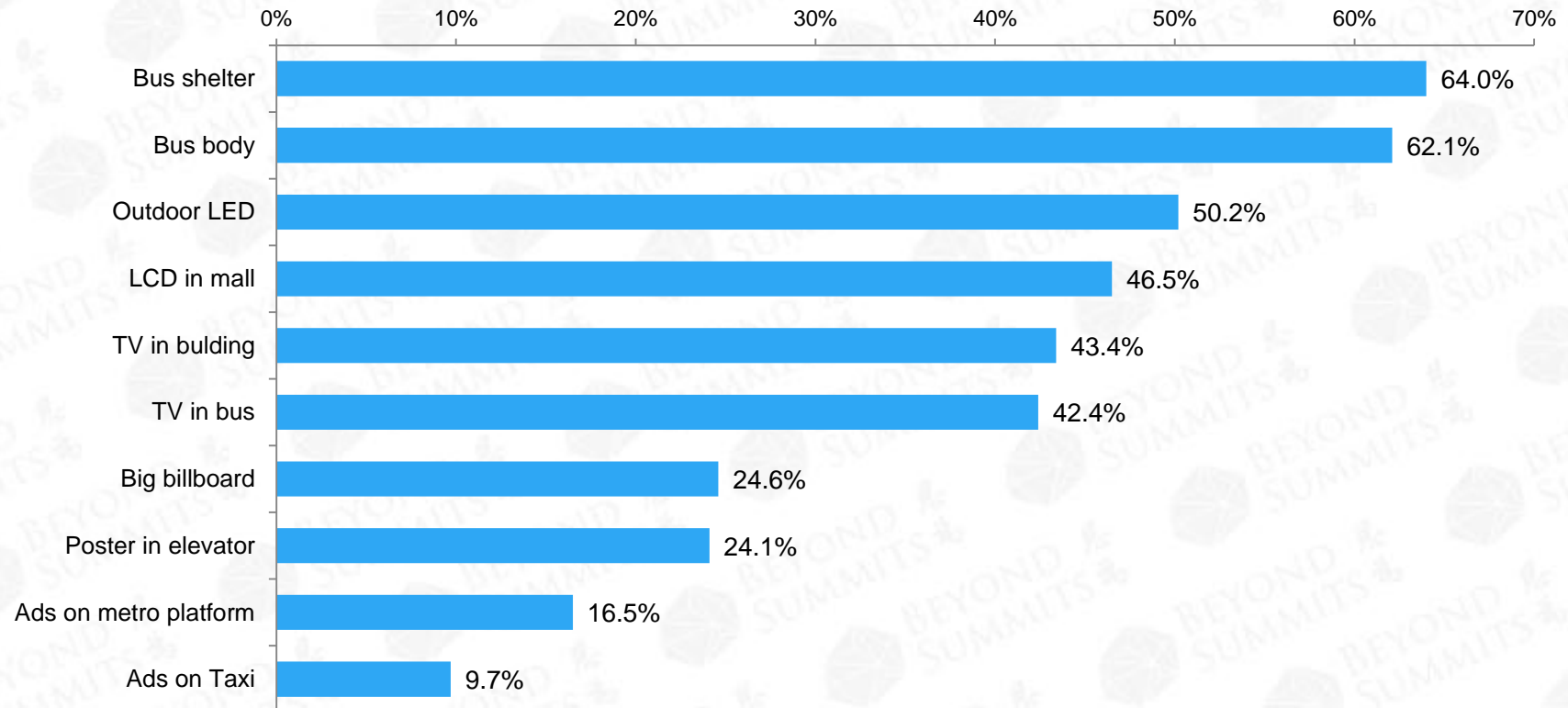
Local policy has great impact on OOH media.

- What OOH has brought is not only commercial effects, but also great public effect on the whole city or even wider.
- OOH ads shall deeply understand and adhere to local policies and regulations.



OOH form is still focusing on public transportations while the reach rate of video OOH is increasing.

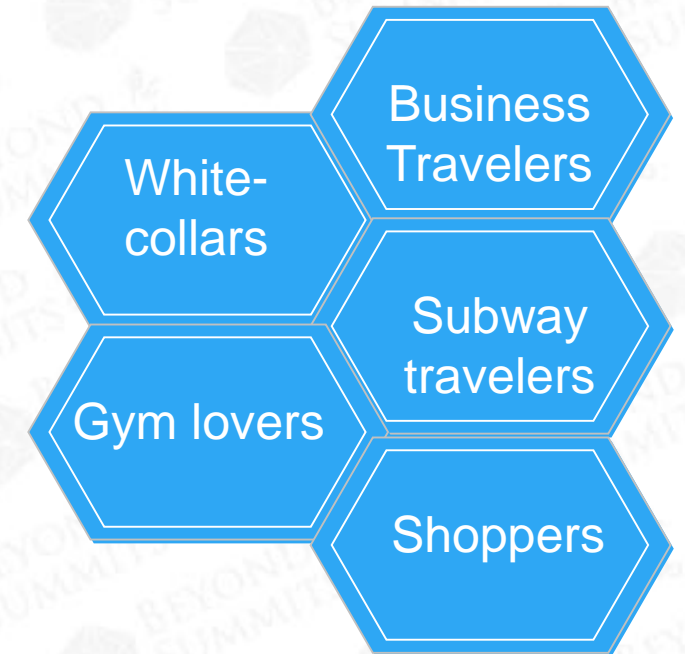
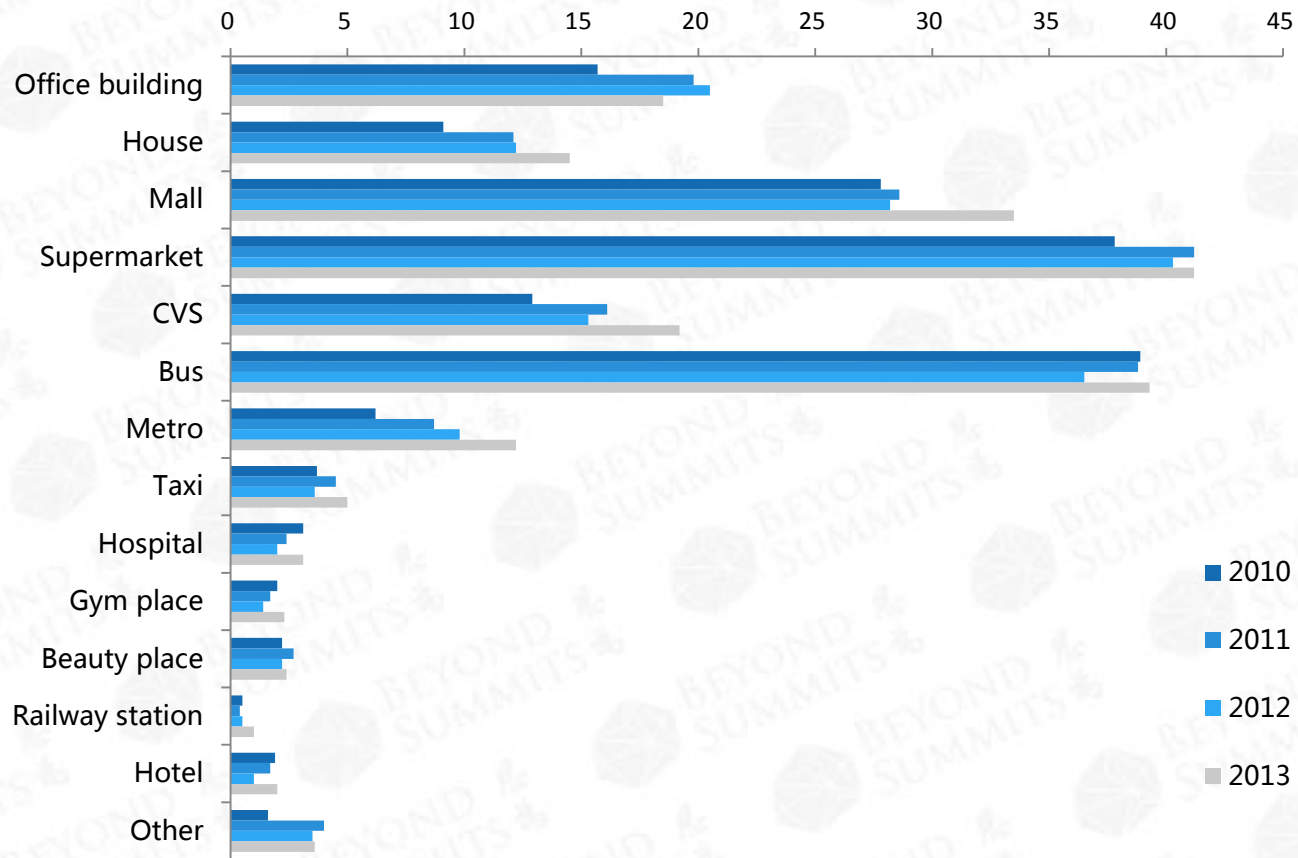
### OOH ad reach rate in 2014



Source: CMMS, Nationwide, P30-50

OOH is gradually stepping from traditional billboard into digital era, from targeting total public into accurate audience segmented by places.

## OOH digital screen's reach by different places(%)



Source : CMMS , 2013



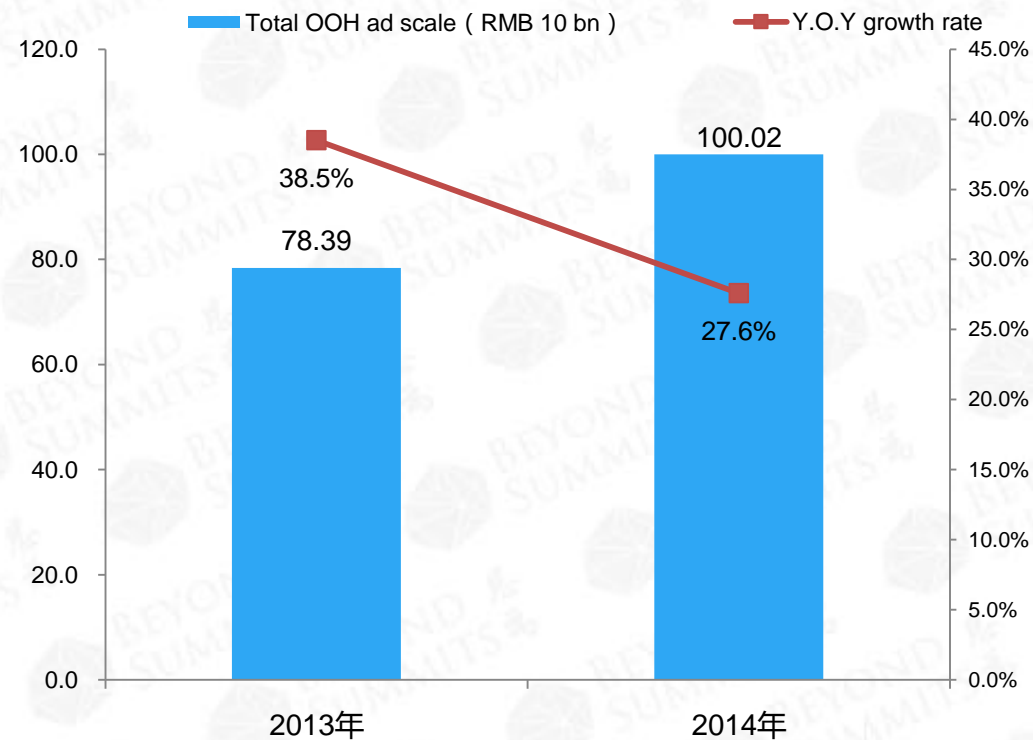
In 2014, the growth of OOH ads' scale is getting slower, the total OOH ads has been accounted for 100 billion RMB in 2014(including rises in ad price).

## 2014 Media ads expense & resource

Media	Rate (Launch)	Resources
	Y.O.Y	Y.O.Y
TV	-0.5%	-11%
Prints	-18%	-21%
Radio	-10%	-19%
OOH	9%	-3%
Videos in Buildings	26%	-
Videos in Cinemas	62%	-
Videos in Transportation	-2%	-
Internet	36%	-

Source : CTR

## 2014 OOH ads scale and growth rate

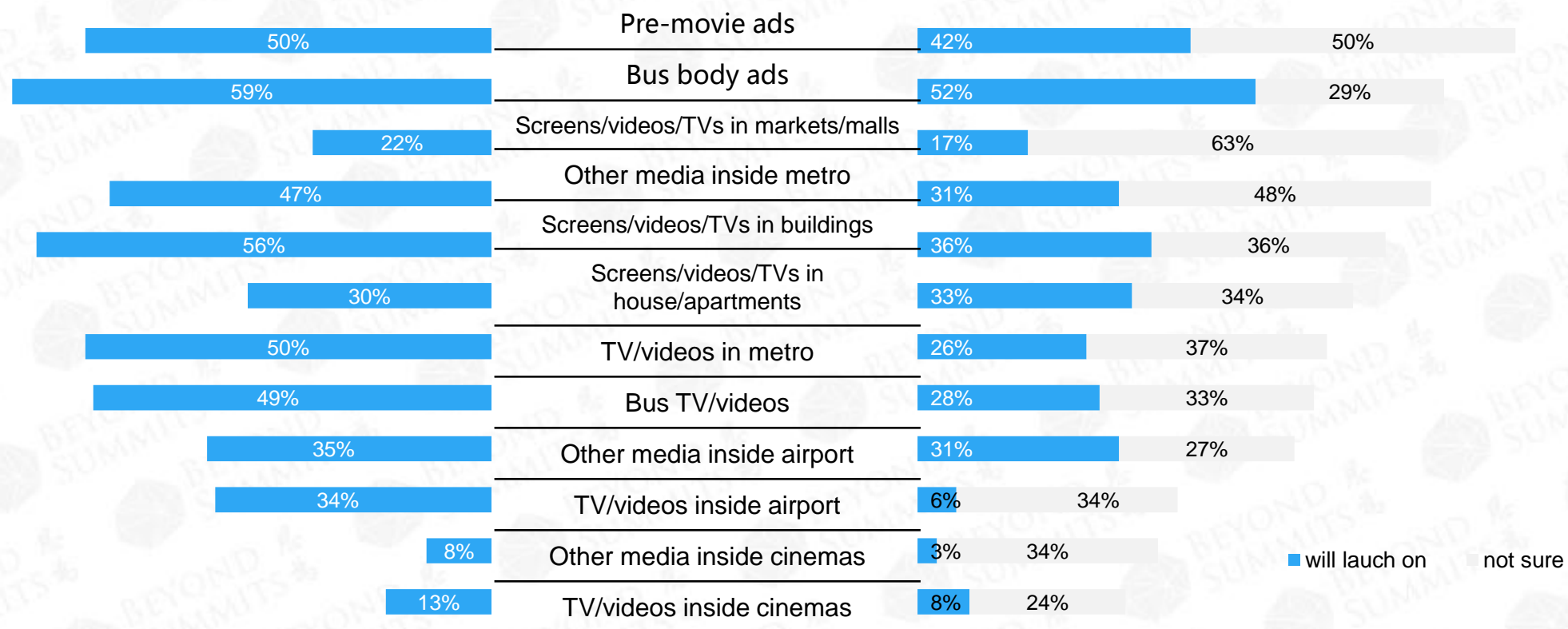


Source : 北京中天盈信

In 2015, pre-movie ads and bus body ads will become advertisers' main choices, videos inside malls and other metro ads are being considered by most of the advertisers.

OOH new media form actually used in 2014

OOH new media form will be used in 2015

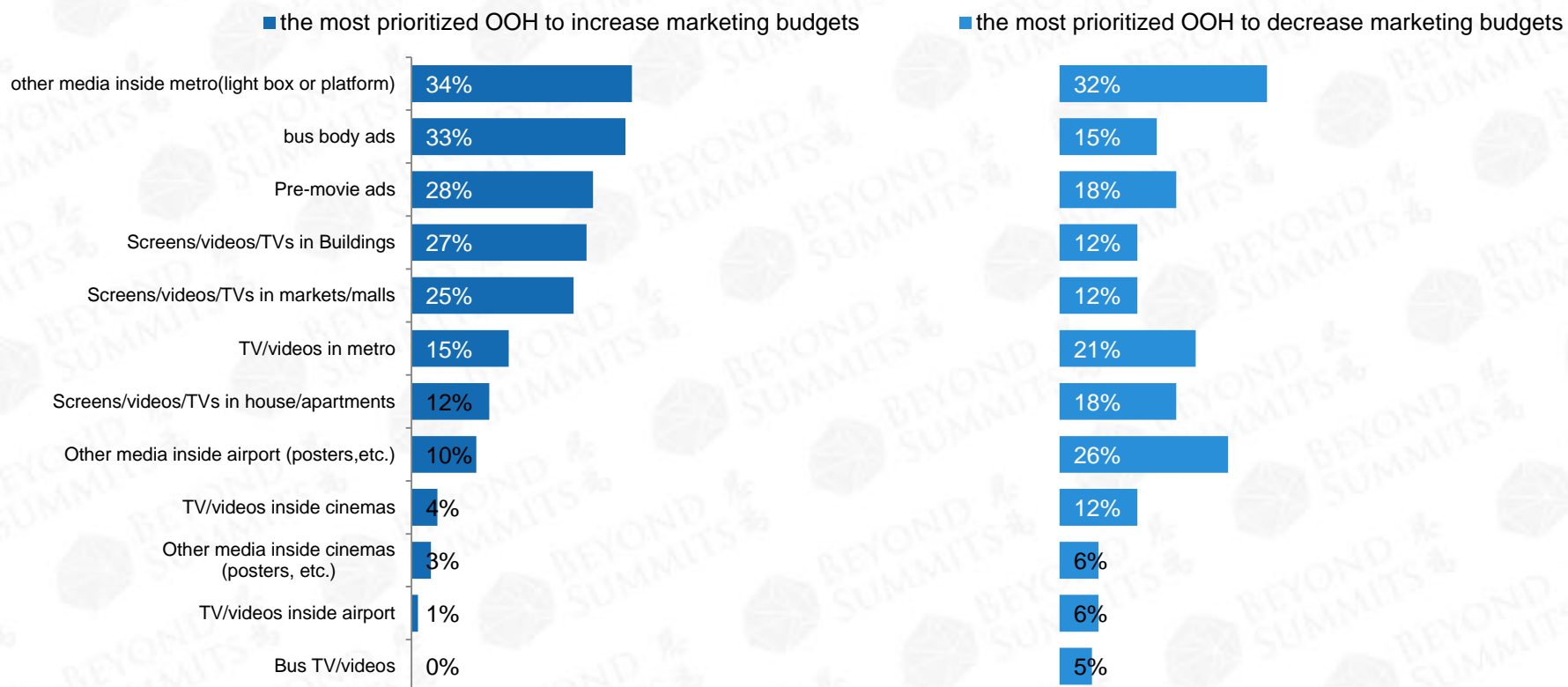


Source : CTR 《2015年广告主 广告营销调查报告》



Bus body ads, pre-movie ads are considered as the first media form when increasing budget while airport ads and light box ads have the worst anti-risk capability when budget changes.

### OOH new media ad form to increase/decrease budget in 2015



Source : CTR 《2015年广告主 广告营销调查报告》

## OOH ads scale by city segmentation in 2014

Advertisers' eyes are still focused on tier one cities to launch OOH ads, with tier one's ads scale takes 55% of total. Tier three cities take least market share. As tier 1/2 cities' market go saturated and tier 3 cities' media keeps expanding, media channels will further sink.

Tier one	2014 (million)	Share in total	2014vs2013
Beijing	24917.5	21.4%	-3.3%
Shanghai	23141.5	19.9%	6.5%
Guangzhou	16426.3	14.1%	-7.8%
<b>Total</b>	<b>64485.3</b>	<b>55.4%</b>	<b>-4.5%</b>

Tier two	2014 (million)	Share in total	2014vs2013
Shenzhen	9236.6	7.9%	2.3%
Chengdu	6669.9	5.7%	4.7%
Nanjing	4177.8	3.6%	0.0%
Hangzhou	4036.6	3.5%	2.8%
Chongqing	3745.6	3.2%	0.1%
Wuhan	3494.4	3.0%	-4.6%
Tianjin	2712.1	2.3%	0.5%
Shenyang	1860.2	1.6%	-0.7%
Xi'an	1302.4	1.1%	-2.1%
Dalian	1221.9	1.1%	-0.1%
Kunming	996.6	0.9%	-2.3%
<b>Total</b>	<b>39454</b>	<b>33.9%</b>	<b>0.6%</b>

Tier three	2014 (million)	Share in total	2014vs2013
Changsha	1548.6	1.3%	1.0%
Qingdao	1468.9	1.3%	1.1%
Jinan	1400.2	1.2%	0.8%
Suzhou	1144.4	1.0%	0.7%
Zhengzhou	988.2	0.8%	0.1%
Changchun	804	0.7%	0.3%
Xiamen	721.9	0.6%	0.2%
Fuzhou	708.7	0.6%	0.2%
Taiyuan	610.6	0.5%	0.2%
Harbin	601.9	0.5%	0.2%
Dongguan	578.5	0.5%	-0.2%
Shijiazhuang	538.6	0.5%	0.4%
Ningbo	442.1	0.4%	0.0%
Zhuhai	315.2	0.3%	-0.5%
Foshan	258.2	0.2%	-0.4%
Wenzhou	228.5	0.2%	0.0%
<b>Total</b>	<b>12358.4</b>	<b>10.6%</b>	<b>4.0%</b>

Source : Beijing CODC data

## OOH media trend:

- 1. Media environment has entered a multiple-screen era, traditional OOH is gradually transferring to digital group**

Consumers are facing a real multi-screen era, traditional TV, online video, mobile video, building TV, all these media constitute a main media matrix in video era. The key for OOH to increase accuracy and influence lies in how OOH integrate and coordinate with other media.

- 2. OOH shall interact with consumer to boost promotion, to increase transmission accuracy**

OOH shall actively establish effective communication channels between brands and consumers, shall identify more clear way to interact with consumers, thus to make consumer digest ads properly. There will be more and more OOH using bi-directional interaction instead of single-way broadcasting in the future.



## OOH media trend:

### 3. **New tech brings new opportunity to OOH, will maximize the media value for advertisers.**

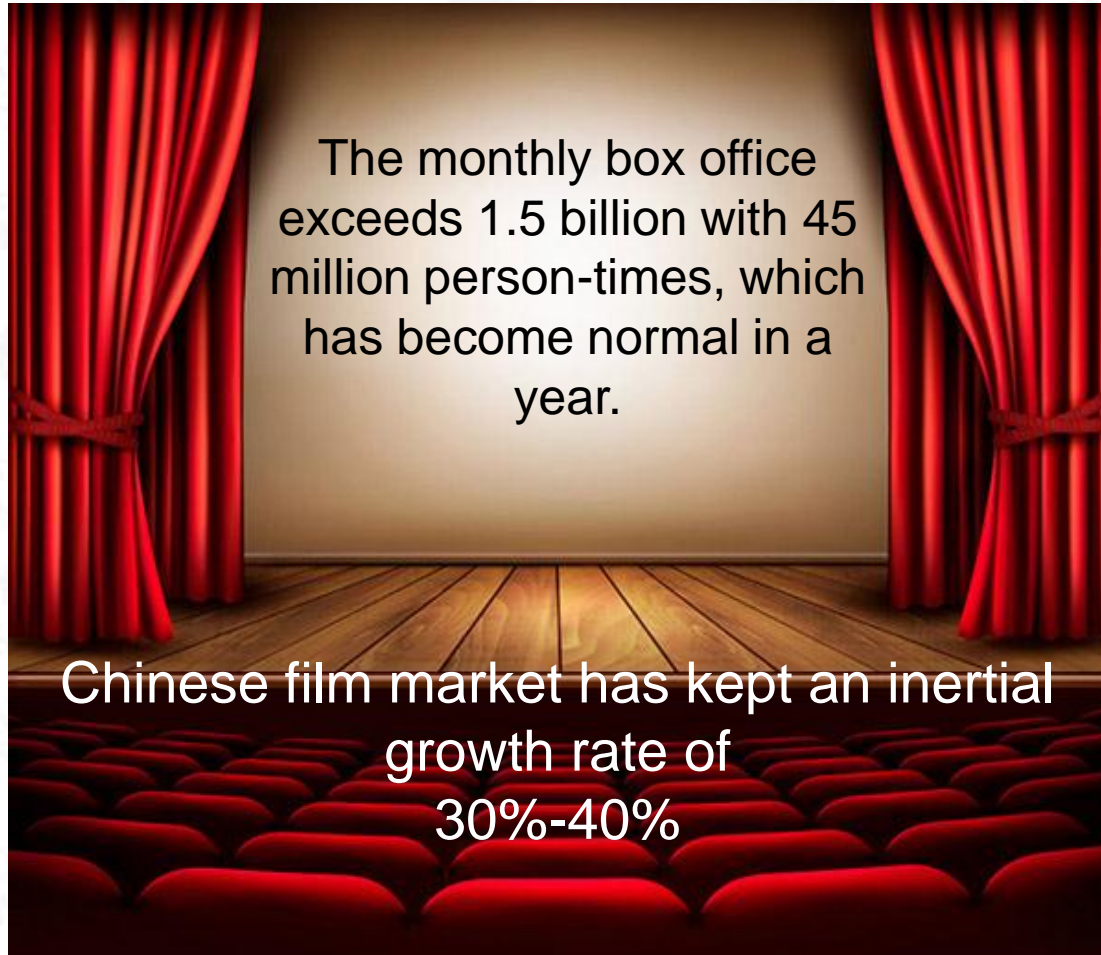
The future OOH media ads will deliver more accurate reach effects via technology and creative innovation such as naked-eye 3D, eye movement tracking technique, etc. to maximize the media value for advertisers. Brands should remember that no technology can apply to brands, everything shall generate from consumers' needs and characteristics.

### 4. **Consumer market is getting fragmented, OOH media should generate exposure for brands.**

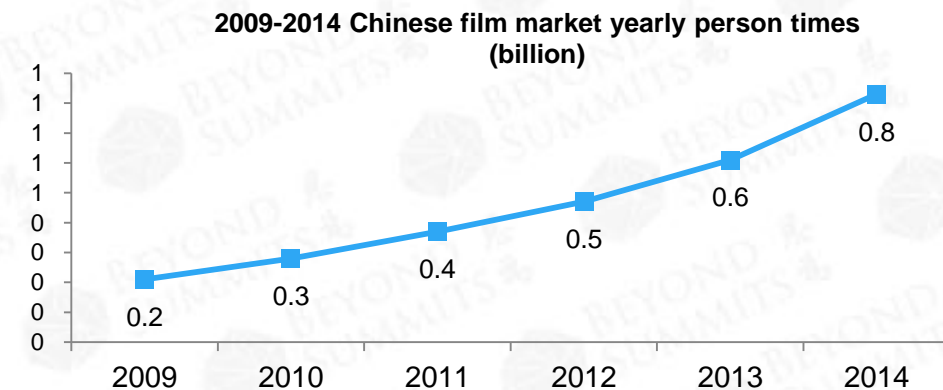
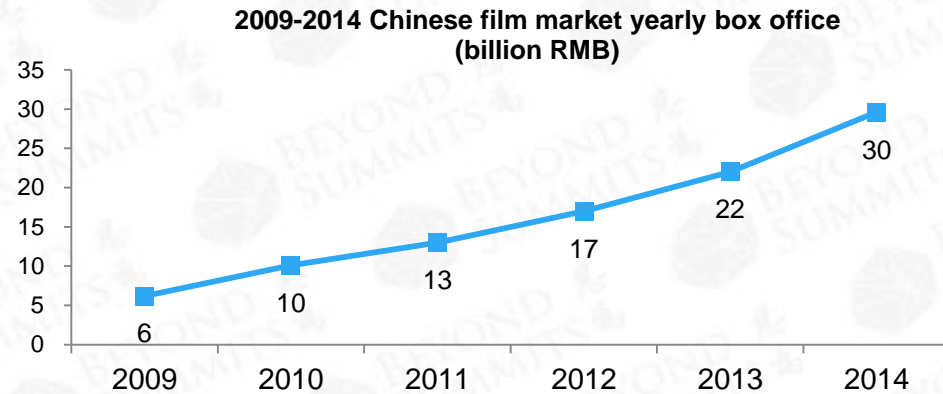
China market is more and more fragmented and diversified, the media environment is so complicated that OOH shall locate target audience and take advantage of business cluster effect, remember 'where there is consumer, there shall be ads exposure', thus to convert ads to consumers' attention or real sales.

# Movie

Chinese film market has achieved rapid growing for 5 years.



Source : ENTGROUP

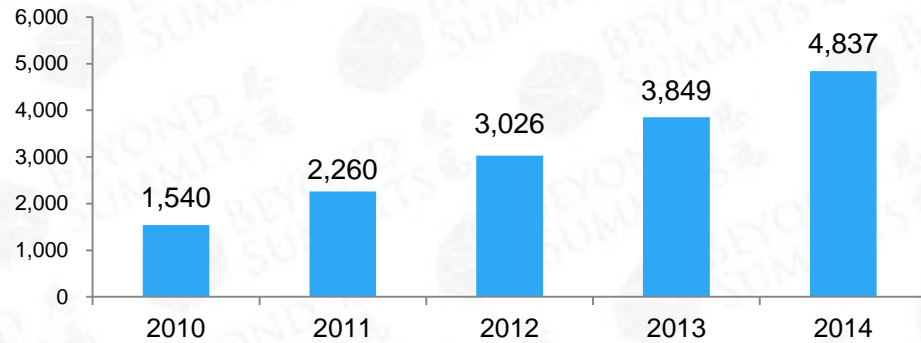




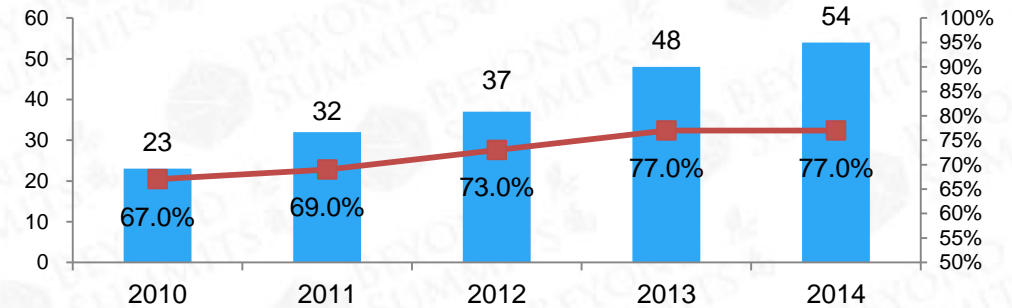
The number of screens is steadily growing with great potentials.

More and more tier-2/3 cities started to enjoy an over-100-million-RMB box office, more and more over-100-million-RMB-box movies are released during a year.

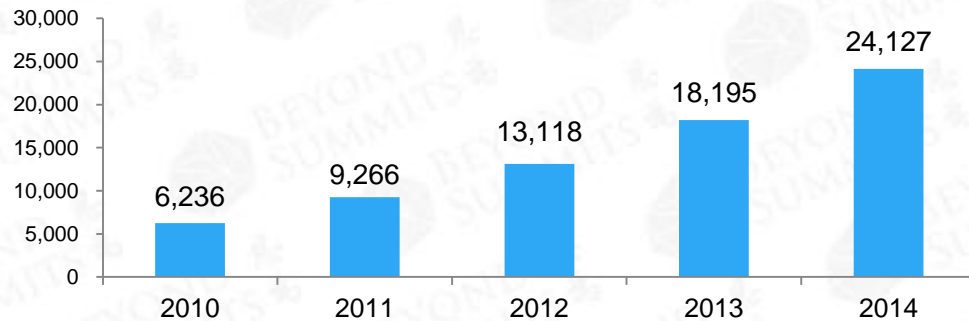
2010-2014 The Numbers of China Cinema



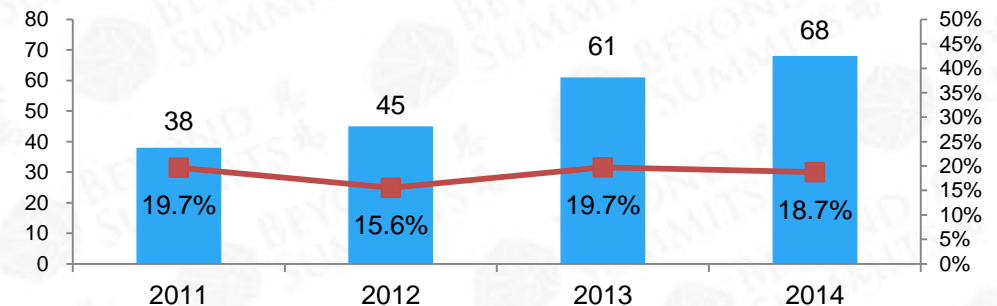
2010-2014 The Number of Cities with 100 million box-office and its share of total-office



2010-2014 The Numbers of Cinema Screens



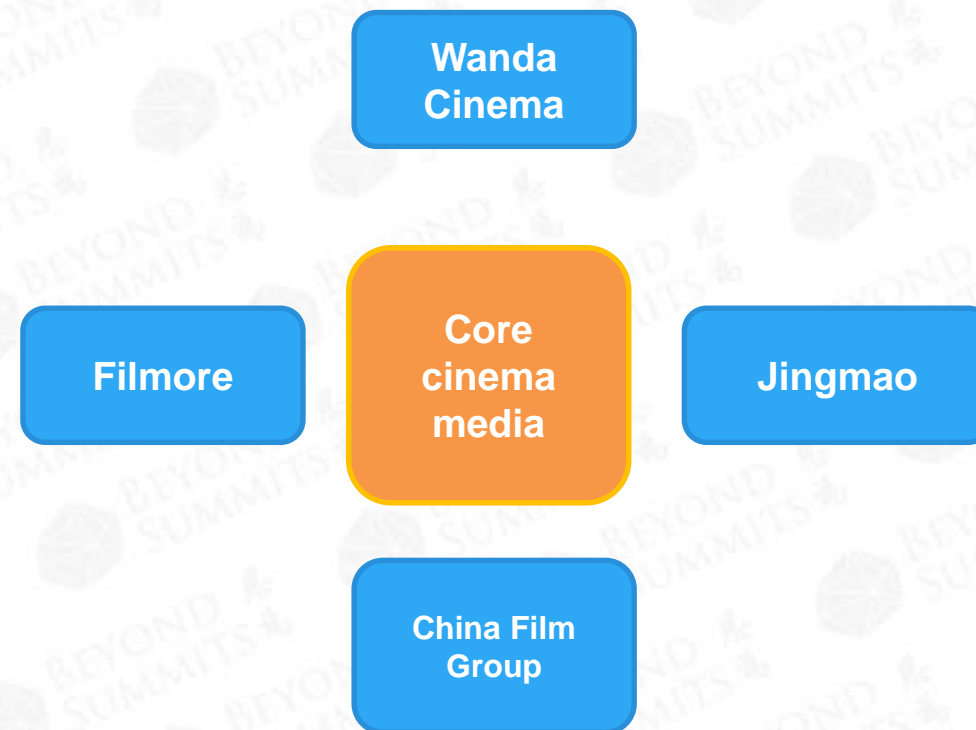
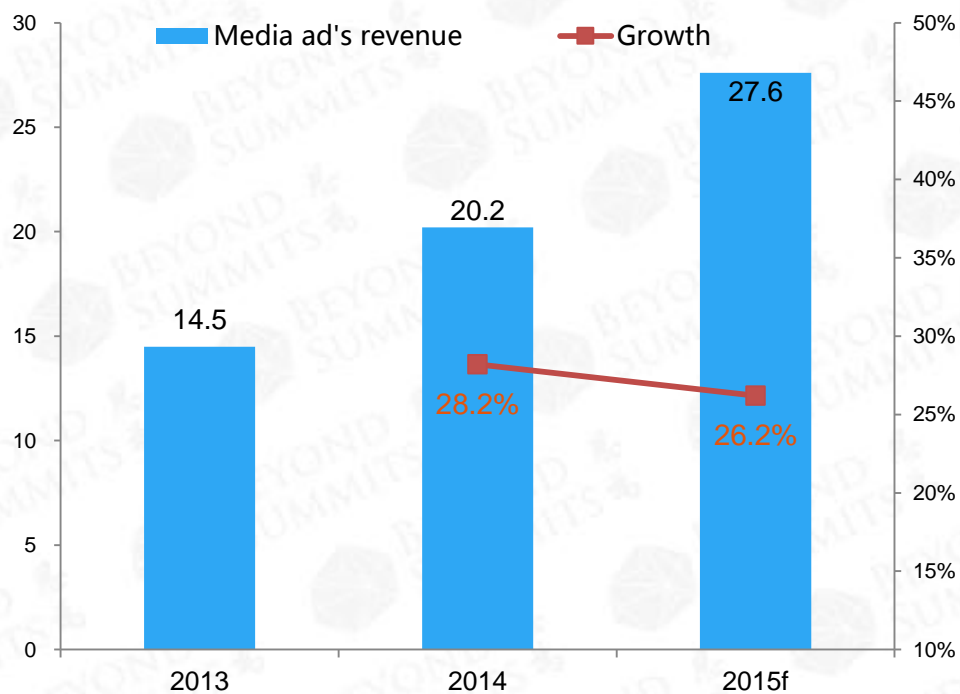
2010-2014 The Number of Movies with 100 million box-office and its share of total box-office



The revenue of cinemas' media ads is continuously increasing.

The growth of number of films and cinemas is the main force that keeps cinema's ad business developing a lot.

Cinema's media ad revenue in China (billion RMB)



Source : 主要影院媒体营业额

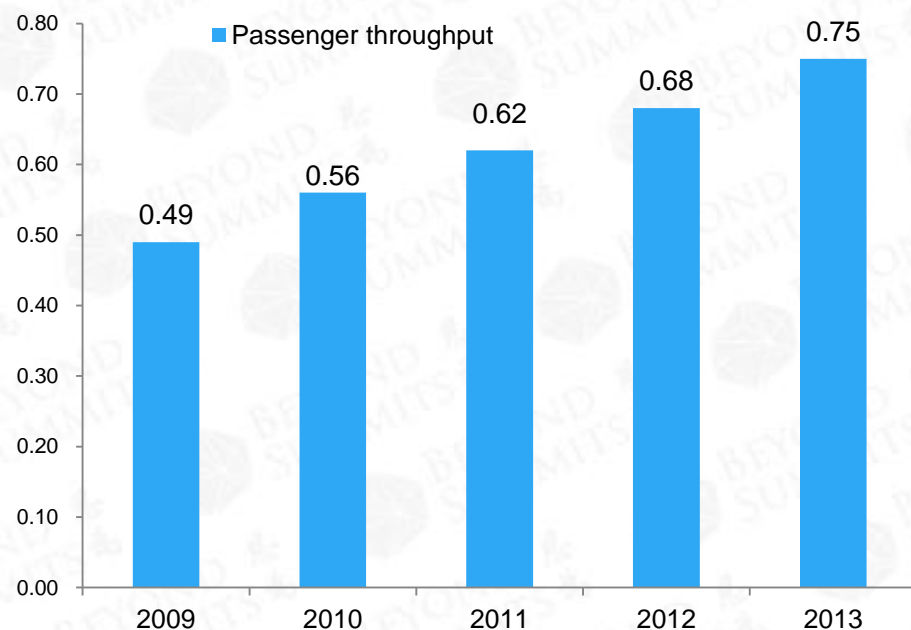
# Airport



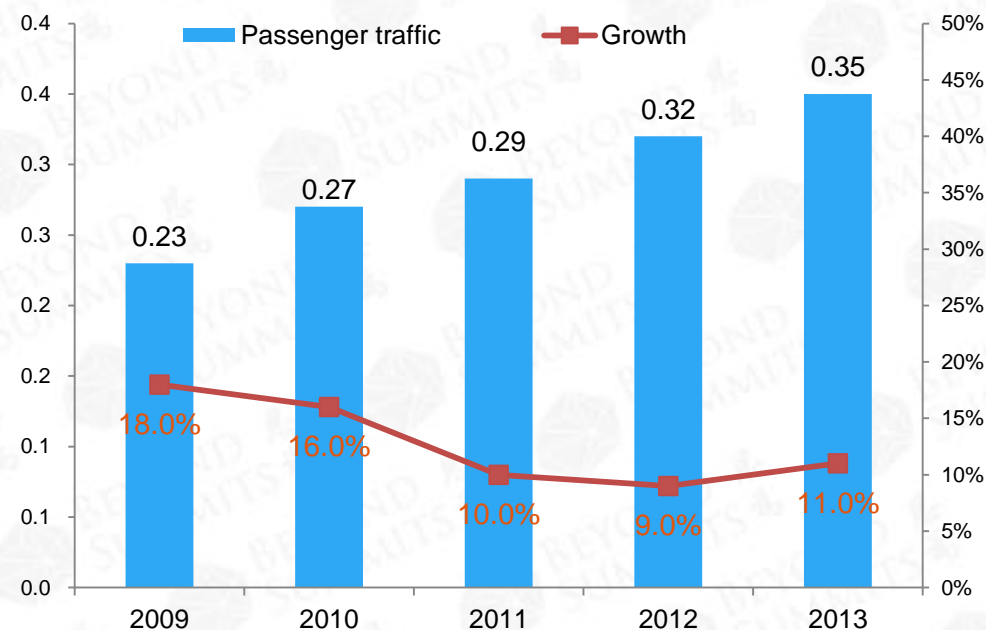
China's civil aviation passenger traffic has been growing for four years.

The main reason that domestic airport's traffic and throughput growing is domestic consumers' more frequent trips and more destinations. The aviation growth is getting slower because of the development of high-speed rail.

China civil airport's passenger throughput from 2009 to 2013 (billion person-times)



China civil aviation's passenger traffic from 2009 to 2013 (billion person-times)

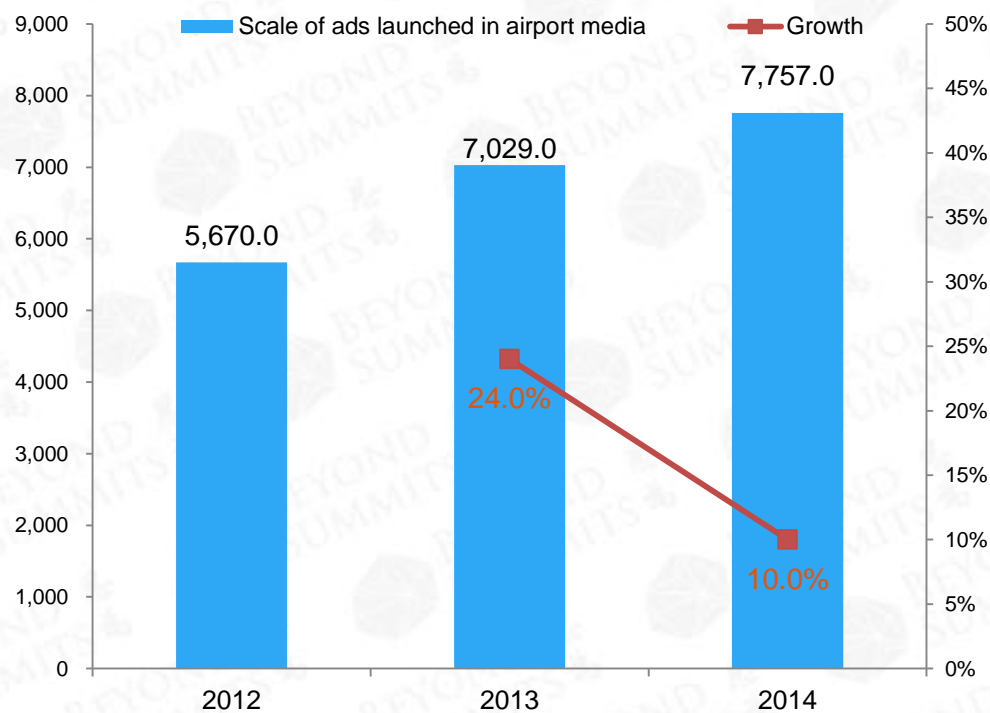


Source : 2014 China civil aviation development report

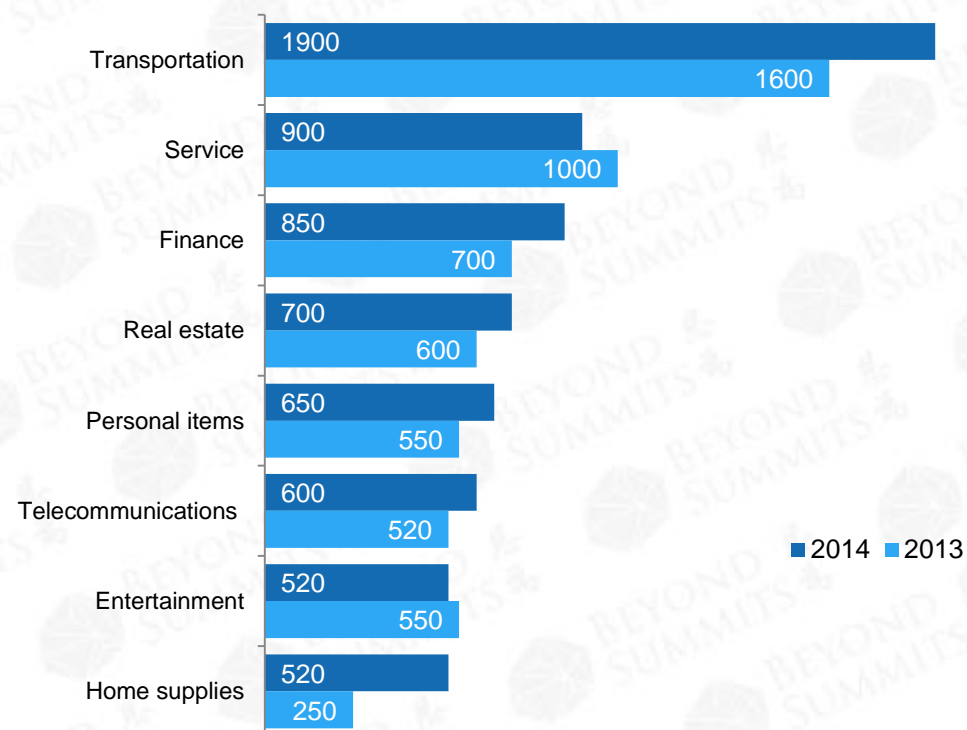
The scale of ads launched in airports keeps increasing but with a slower growth.

Automobiles, service and finance industry are biggest airport advertisers.

Scale of ads launched in airport media from 2012 to 2014  
(million RMB)



Category of ads launched in airport media from 2013 to 2014  
(million RMB)



Source : Beijing CODC survey data

2015 China Overview, covering Chinese economy, media and markets, is a set of yearly research report conducted and published by Beyond Summits Ltd, a leading all-media total solution provider focused on cross-border brand building & destination marketing in China. This report aims to summarize domestic industries' status in 2015, introduce Chinese market knowledge to overseas stakeholders, and propose Chinese market insights. The whole set of China Overview includes 20 sub-topics including economy, city, people, the rich, luxury, investment, auto, tourism, immigration and cross-border business, as well as Chinese all media, internet, mobile internet, social media, TV, radio, print, OOH, movie and airport.

This report is the full version of 2014-2015 China Overview OOH, Movie and Airport Ads Research. More reports can be downloaded from Beyond Summits' official website link: [http://www.beyondsummits.com/reports\\_downloading](http://www.beyondsummits.com/reports_downloading)

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