Hong Kong International Airport Advertising
JCDecaux No.1

- Worldwide in street furniture advertising.
- European billboard advertising.
- Worldwide in airport advertising: 163 concessions in 16 countries.
- Worldwide in transport advertising: 263 transport contracts in metros, buses, tramways & trains.
- Outdoor advertising in Asia-Pacific.
- Self-service bicycles.

JCDecaux reaches an estimated 308 million people worldwide every day.

The Group has operations in 55 countries with a presence in 3,542 cities.
Number 1 in Asia Pacific

* includes Hong Kong & Macau.
JCDecaux Transport
No.1 Hong Kong outdoor advertising

JCDecaux Airport
No.1 worldwide for airport advertising with concessions in 163 airports
1st in Asia airport advertising – 7 airports

Hong Kong
Asia’s international financial centre
Main hub in Asia and as major gateway to/from China
Within 5 hours to reach half of the world's population
World’s freest economy
Around 150 destinations including 40 cities in Mainland China
The Best of the Best
Hong Kong International Airport

- Named the world’s best airport more than 25 times in 10 years***
- Named ‘World’s Best Airport” for 7 times in 8 years
- 4th busiest international airport*
- 1st busiest international airport in Asia*
- Average Daily Passenger Flow: 126,000
- Best Airport in China - 2006, 2008****
- 2008 Awards: World Best Airport**

Sources: *Airport Council International (Last Update on Mar 2009)
**Skytrax 2008
***AAHK 08/09 Annual Report
****Business Traveller Magazine China
## HKIA Facts & Figures

### Passenger Figures

- **2009 Jan to Dec:** 46.1 million*
- **No. of Terminals:** 2
- **Around 150 destinations including 40 cities in Mainland China with about 85 airlines.**

### Top 5 Destinations**

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mainland China</td>
<td>20.7%</td>
</tr>
<tr>
<td>Southeast Asia</td>
<td>20.4%</td>
</tr>
<tr>
<td>Taiwan</td>
<td>18.7%</td>
</tr>
<tr>
<td>Europe</td>
<td>11%</td>
</tr>
<tr>
<td>USA/Canada</td>
<td>7.6%</td>
</tr>
</tbody>
</table>

*Source: *AAHK Data Jan 2010  
**HKIA Fact Sheet July 2009*
HKIA Connectivity
A True Multi-Modal Transport Hub

Hong Kong International Airport
• Half of the world’s population live within 5 hours' flying time
• Around 750 flights daily to and from HKIA
• The new North Satellite Concourse was opened in Dec 2009. It is equipped with 10 bridge-served stands for narrow bodied aircraft targeting primarily Greater China flights and short-haul passengers

SkyPier
• An innovative service that facilitates sea-to-air and air-to-sea traffic to/from 8 ports in the Pearl Delta River area and Macau (Shekou and Fuyong in Shenzhen, Guangzhou Nansha, Dongguan Humen, Zhongshan, Zhuhai Jiuzhou, Macau's Maritime Ferry Terminal and Taipa)
• With 4 berths and 20 airline check-in counters, the SkyPier is designed to handle up to 600,000 passengers annually
HKIA Passenger Throughput

Annual Compound growth of 6.1% from 2005 - 2008

Source: * Passenger’s Throughput, Airport Authority Hong Kong
Top 5 by Passenger Throughput  2009 (International Airport)

1st: London, GB (LHR)
2nd: Paris, FR (CDG)
3rd: Amsterdam, NL (AMS)
4th: Hong Kong, CN (HKG)
5th: Frankfurt, DE (FRA)

Source: Airport Council International (Last Update on Mar 2009)
HKIA - Major Gateway to China

90 Airlines Flying Daily to over 150 Destinations, including 40 cities in Mainland China
Superior user profile in HKIA in terms of income and education level means an elite group of discerning customers.

A good mix of international and Asian travellers with a significant proportion of Mainland Chinese.

Passengers with evenly distributed nationality flying to 150 destinations all over the world.
HKIA – Passenger Profile

- Monthly household income is 2.8x higher than general population
- Over 50% are PMEB (Professionals, Managers, Executives and Businessmen)

*HKIA Traffic Statistics (Jan – Dec 2009)
A good mix of international and Asian travellers with a significant proportion of mainland Chinese connecting to all over the world.

- Mainland China: 25%
- Taiwan: 15%
- South and SE Asia: 16%
- USA, Canada and Central / S. America: 11%
- Europe, Africa and Middle East: 14%
- Japan: 9%
- South Korea: 4%
- Australia / New Zealand and S. Pacific: 5%
An inescapable exposure time in a captive environment with no interference and 100% dedicated to travel

Extensive dwell time in a receptive mindset for passengers that generates advertising impact

Average dwell time nearly 3 hrs

Transit/Transfer passengers

Departing passengers
(Non-local outbound passengers)

Arriving passengers

3h26min

2h07min

2h03min

Most passengers consider advertisements at Hong Kong International Airport better than other airports:

- Blend-in and enhance airport ambience – 70%
- Variety of advertising formats – 74%
- Design of advertisements – 72%
- Attractiveness of advertising – 67%
- Innovation / interactivity of advertisements – 69% / 72%

80% of Air Passengers think that HKIA advertisements are impactful

- 83% passengers consider the advertisements in HKIA enhance the overall ambience of the terminal building
- 72% respondents state that they are interested in knowing more about the products
- 70% passengers likely to purchase after seeing their advertisements or promotions at HKIA
- Overall the advertising at HKIA is seen by 68% of airport users

The Trend
Digital OOH media is one of the fastest growing medium in advertising, +57% 2007/08 year-on-year growth by format

Movement brings awareness
94% stated that moving adverts were more striking than static ads
87% stated that animated digital ads would defiantly grab their attention

Source: JCDecaux Airport Eye-Tracker Survey 2009

Over 65% of airport users agree that Digital Panels are effective in delivering the advertising message

1. Terminal 1
2. Terminal 2
3. North Concourse
4. South Concourse
5. Central Concourse
6. Northwest Concourse
7. Southwest Concourse
8. North Satellite Concourse
9. Regal Hotel
10. AsiaWorld-Expo
11. Sky Pier
12. Sky City Marriott Hotel
13. Golf Course
**ARRIVAL LEVEL 5**

**Non-restricted Area:**
- Meeters & Greeters Hall

**Restricted Area:**
- North Concourse, South Concourse, Central Concourse, NW Concourse, SW Concourse
- Baggage Reclaim Hall

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**DEPARTURE LEVEL 7**

**Non-restricted Area:**
- Check in Hall
- Retail Shops

**Restricted Area:**
- Immigration Area
- Retail Shops
- Food Courts

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**DEPARTURE LEVEL 6**

**Restricted Area:**
- Luxury Brand Boutique Boulevard, Duty Free Shops, East Hall
- North Concourse, South Concourse, Central Concourse, NW Concourse, SW Concourse

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**DEPARTURE LEVEL 7**

**Non-restricted Area:**
- Check in Hall
- Retail Shops

**Restricted Area:**
- Immigration Area
- Retail Shops
- Food Courts

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**DEPARTURE LEVEL 6**

**Restricted Area:**
- Luxury Brand Boutique Boulevard, Duty Free Shops, East Hall
- North Concourse, South Concourse, Central Concourse, NW Concourse, SW Concourse
LEVEL 6
Non-restricted Area:
- Food Court & Restaurants
- 4 Entertainment Zones
- Retail Shops

LEVEL 5
Non-restricted Area:
- Check in Hall
- Retail Shops & Restaurants

LEVEL 3
Non-restricted Area:
- Tour Coach Station
- Retail Shops
Restricted Area:
- Immigration Area
### Departure Flights Distribution

1. **North Concourse**
   - Air China
   - British Airways
   - China Eastern
   - China Southern
   - Dragonair
   - Korean Air
   - Philippine Airlines
   - Qantas Airways

2. **Northwest Concourse**
   - Air China
   - Cathay Pacific
   - China Eastern
   - China Southern
   - Eva Airways
   - United Airlines
   - Virgin Atlantic

3. **Central Concourse**
   - Air China
   - Cathay Pacific
   - China Airlines
   - China Eastern
   - China Southern
   - Continental
   - Dragonair
   - Malaysia Airlines
   - Nippon Airways
   - Northwest Airlines
   - Singapore Airlines

4. **Southwest Concourse**
   - Cathay Pacific
   - Dragonair
   - Japan Airlines
   - Thai Airways

5. **South Concourse**
   - Cathay Pacific
   - Dragonair
   - Qatar Airways
   - Singapore Airlines
Terminal 1 & North Satellite Concourse

**Star Alliance**
- Air China
- Shanghai Airlines
- Thai Airways
- ANA
- Singapore Airlines
- Asiana Airlines
- United Express
- Austrian Airlines
- Scandinavian Airlines
- Lufthansa
- Air New Zealand
- Air Canada

**One World**
- Cathay Pacific
- Dragonair
- Qantas
- JAL
- Finnair
- British Airways

**Non-alliance**
- Qatar Airways
- Emirates
- Air Macau
- Etihad Airways
- S7 Airlines
- Turkish Airlines
- Turkish Airlines
- China Airlines
- Eva Air
The Best Shopping Environment

- Over 260 retail shops, 60 catering outlets and 4 entertainment zones at both terminals
- 41 top tier luxury brand boutiques at East Hall and West Hall, Terminal 1
- 70% outlets inside the restricted area and 30% located in the non-restricted area in Terminal 1
- 98% outlets located in the non-restricted area at Terminal 2
- Wide variety of shops in good mix of categories includes shopping, dining and entertainment
HKIA Shoppers' Behavior

Average Spend Per Shopper
(including all shops & restaurants)

Over US$90

Top 3 Spenders

1. Mainland Chinese: Over US$165
2. Japanese: Over US$107
3. Taiwanese: Over US$92

Source: HKIA Retail Tracking Survey 2009
Premium Media

• Lightbox on Glass Wall
• Secondary Icon & Lightbox on Glass Balustrade
• Bulkhead Column Mounted Lightbox
• Column Lightbox
• Primary Icon Lightbox
• Totem
• Frontlit Billboard
• Mega Glass Balustrade Lightbox
• Column Mounted Lightbox
• Portrait Exterior Billboard
• Landscape Exterior Billboard

Key Benefits:
• Giant in size offers high visual impact
• Effective brand building tool
63% of HKIA departing passenger were well aware of this premium format*

Source: *HKIA Advertising Effectiveness Survey, Oct 2009
Estee Lauder – Secondary Icon & Lightbox on Glass Balustrade
(Terminal 1, Departure Level 6, East Hall, Restricted Area)
Lancôme - Column Lightbox
(Terminal 1, Departure Level 6, East Hall Restricted Area)
Chow Tai Fook – Primary Icon Lightbox
(Terminal 1, Departure Level 7, East Hall, Restricted Area)
71% of HKIA passenger found Totem were very attractive*

Source: *HKIA Advertising Effectiveness Survey, Oct 2009
Premium

Ermenegildo Zegna - Frontlit Billboard
(Terminal 1, Arrival Level 5, Restricted Area – right before immigration)
Deutsche Bank - Mega Glass Balustrade Lightbox
(Terminal 1, Arrival Level 5, Baggage Reclaim Hall, Restricted Area)
Breitling – Bulkhead Column Mounted Lightbox
(Terminal 1, Arrival Level 5, Arrival Greeting Hall, Non-Restricted Area)
Citibank - Portrait Exterior Billboard
(Main access road to the terminal buildings)
Singapore Airlines - Landscape Exterior Billboard
(Main access road to the terminal buildings)
Digital Media

- Digital Business Network
- Digital Duty Free Network
- Digital Boarding Gate Network

Key Benefits:
- Innovated technology to stimulate attention and increase impact
- Multiple displays to showcase range of new product features
- Strategic locations to capture quality audiences
- Over 60% of airport users consider Digital Panels effective in delivering advertising messages*

Source: *HKIA Advertising Effectiveness Survey, Oct 2009
Emerson – Digital Business Network
(Terminal 1, Departure Level 7, Restricted Area – right after immigration)
Longchamp – Digital Duty Free Network
(Terminal 1, Departure Level 6, East Hall, Restricted Area)
Lancôme – Digital Duty Free Network
(Terminal 1, Departure Level 6, East Hall, Restricted Area)
Special Media

- Glass Lift Wrap
- Airbridge Interior Wrap
- Wrap on Glass Balustrade
- Baggage Trolley

Key Benefits:
- Impressive and acts as alternatives to traditional formats
- Stimulate brand awareness
Relax in our very flat, very cosy z z z z z
Introducing our new Business Class.

www.cathaypacific.com

Cathay Pacific – Glass Lift Wrap
(Terminal 1, Departure Level 7, East Hall, Restricted Area – right after immigration)
RBS – Airbridge Interior Wrap
Intel – Wrap on Glass Balustrade
American Express – Baggage Trolley
Motion and Interactive Media

- Power Pole
- Interactive Panel
- MultiMedia Wall
- Arrival LED TV with Lightbox

Key Benefits:
- Innovative formats to maximize advertising creativity
- Engage target customers to enhance effective communication
Interactive

1010 – Power Pole
(Terminal 1, Departure Level 6, Departure Central Concourse, Restricted Area)
1O1O – Digital Interactive Panel
(Terminal 1, Departure Level 6, Departure Central Concourse, Restricted Area)
Vertu - Arrival LED TV with Lightbox
(Terminal 1, Arrival Level 6, Arrival Greeting Hall, Non-Restricted Area)
Exhibition Site

Terminal 1
- Check in Hall
- Duty Free Area

Terminal 2
- Arrival Mainland Coach Lounge Area

Key Benefits:
• Effective two-way communication can be achieved by face-to-face interaction
• Strategic locations to target customers
• 72% of airport users think that the exhibition sites are effective in delivering advertising messages*

Source: *HKIA Advertising Effectiveness Survey, Oct 2009
Exhibition

Emirates – Exhibition Site
(Terminal 1, Departure Level 7, Check in Hall, Non-Restricted Area)
Omega – Exhibition Site
(Terminal 1, Departure Level 6, East Hall, Restricted Area)
Marriott – Exhibition Site
(Terminal 2, Arrival Level 3, Non-Restricted Area)
Lightbox Network

Over 15 packages with variety of lightbox format and tactically located throughout the airport undoubtedly be seen by all passengers

Network Benefits:
- Guarantee exposure due to repetitive presence
- Up to 100% coverage of arriving and departing passengers
64% of HKIA departing passengers were well aware of the Lightbox at Departure Hall L7*

Source: *HKIA Advertising Effectiveness Survey, Oct 2009
64% of HKIA departing passengers were well aware of the Lightbox at Departure Hall L7*

Source: *HKIA Advertising Effectiveness Survey, Oct 2009
Chivas – Free Standing Lightbox, Departure Concourses Network
(Terminal 1, Departure Level 6, Departure Concourses, Restricted Area)
Bank of America – Arrival Concourses Lightbox Network
(Terminal 1, Arrival Level 5, Arrival Central Concourse, Restricted Area)
70% of HKIA arriving passengers were well aware of the Baggage Reclaim Lightbox *

Source: *HKIA Advertising Effectiveness Survey, Oct 2009
Advertising Format in HKIA

Banner Network

A variety of banner formats and tactically located throughout the airport undoubtedly be seen by all passengers

Network Benefits:
• Up to 100% coverage of arriving and departing passengers
• Various formats to suit your needs
Lancome – Check-in Ceiling Banner Network
(Terminal 1, Departure Level 7, Check-in Hall, Non-Restricted Area)

Source: *HKIA Advertising Effectiveness Survey, Oct 2009

63% of HKIA departing passengers were well aware of the Ceiling Banner at Departure Hall L7*

*Source: HKIA Advertising Effectiveness Survey, Oct 2009*
Contact Us for More Details!

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