

iPhone X (1)

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oOh!media
MACQUARIE AUSTRALIA CONFERENCE
30th April 2019



BRENDON COOK
CEO



SHEILA LINES
CFO

ooh! HISTORY OF GROWTH



1989
Billboards



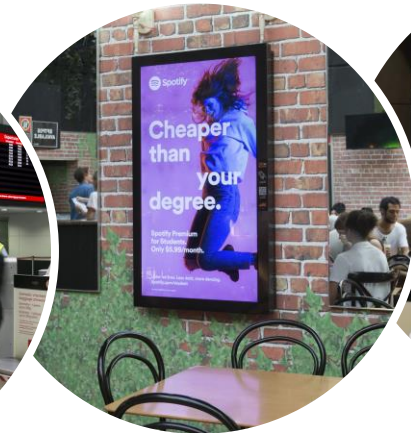
2006
Retail



2010
Cafes & Venue



2012
Fly



2013
Study



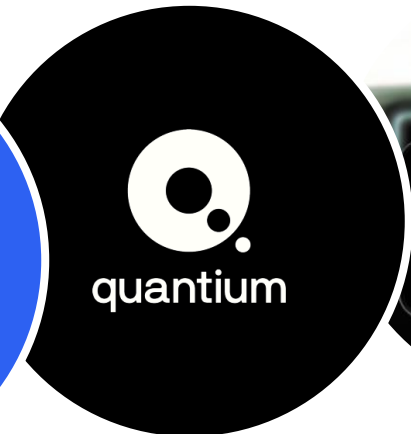
2014
Lounges



2016
Office



2016
Acquires Junkee Media



2016
Partners with Quantum



2018
Inflight



2018
Rail



2018
Street Furniture

oOh! THE BUSINESS IT IS TODAY



WHY IS OUT OF HOME MEDIA POWERFUL?



OOH CONTINUES TO SHOW ABOVE MARKET GROWTH

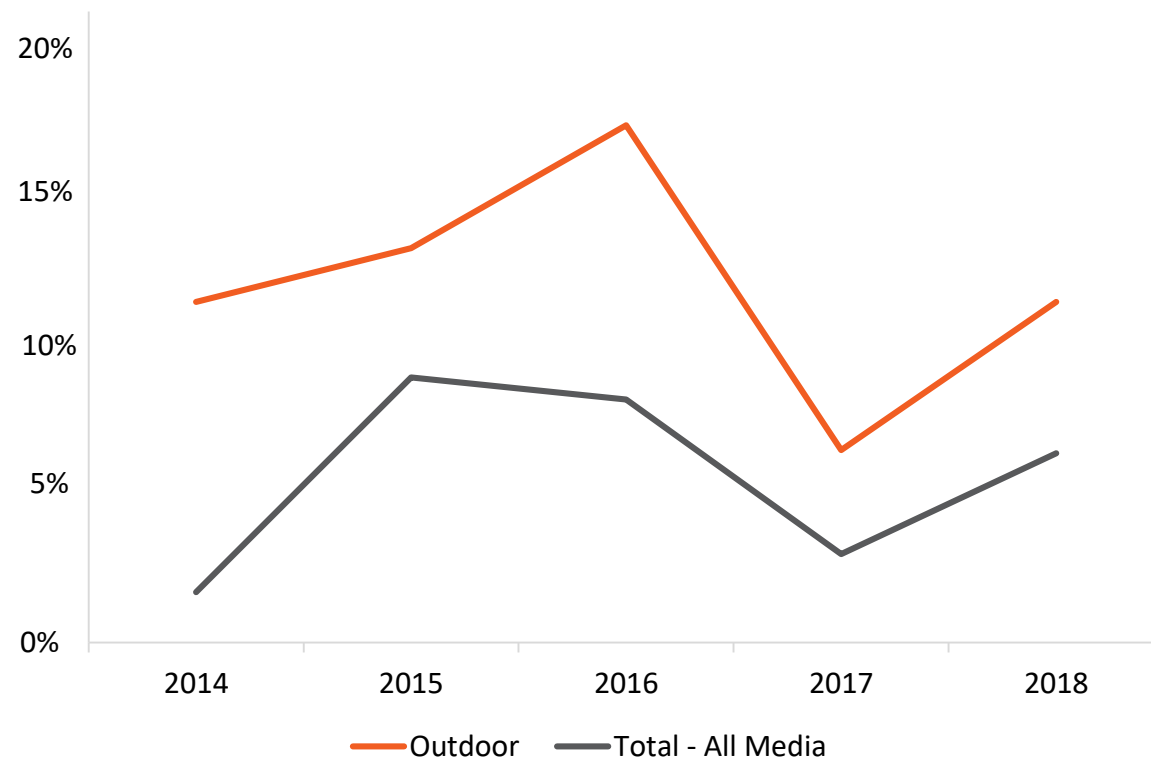
OOH second for growth

Category	2018 Total revenue '000s*	% Change (2018 on 2017)	% Share
Online	7,197,700	12.1%	48.1%
OOH	927,176	10.8%	6.2%
Radio	1,191,959	3.6%	7.9%
Print	1,899,460	1.8%	12.6%
Cinema	129,750	0.2%	0.01%
Television	3,627,425	-2.5%	24.2%
Total	14,973,470	6.0%	-

*Total revenue and Online excludes revenue received for Online Classifieds. Print includes both Print Media and Print Media Digital

SOURCE: CEASA 2018 ANNUAL REPORT RELEASED APRIL 2019, BASED ON REVENUE EXCLUDING ONLINE CLASSIFIEDS

Australian Revenue Change Year on Year
(Excluding Classifieds & Directories)



THE
RECOGNITION
OF THE ROLE
OOH PLAYS IN
GENERATING
ROI WILL **FUEL**
THIS GROWTH



**MARKET MIX
MODELLING IS THE
MOST USED METHOD
BY ADVERTISERS TO
UNDERSTAND HOW TO
GENERATE A RETURN
ON INVESTMENT**



ANALYTIC PARTNERS - 2019 STUDY

MARKET MIX MODELLING

AVERAGE & NORMS OF AP CLIENT DATABASE

140+

Australian
Advertisers

350

Australian
Studies

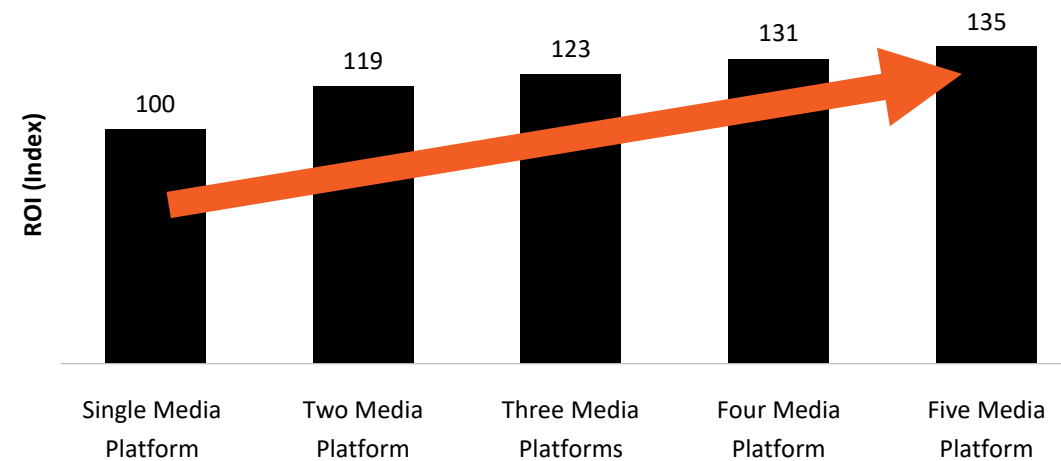
\$9

Billion in
Marketing
spend



MULTI MEDIA CHANNEL CAMPAIGNS WORK BEST FOR ADVERTISERS

ROI strategy comparison

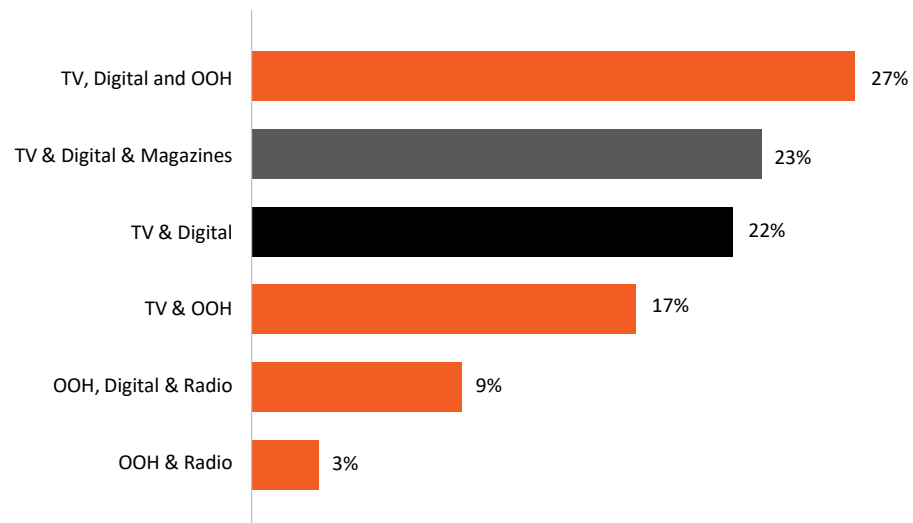


SOURCE: COLLECTED MIX MIDELS FROM THE LEADING EDGE & ANALYTIC PARTNERS 2002-2018

OOH UNLOCKS SIGNIFICANT ROI FOR ADVERTISERS WHEN USED WITH OTHER MEDIA

ROI indexes: combining TV & Digital with OOH

Baseline: If \$1 spent on TV = \$1 return (i.e. 100%)



SOURCE: COLLECTED MIX MODELS FROM THE LEADING EDGE & ANALYTIC PARTNERS 2002-2018

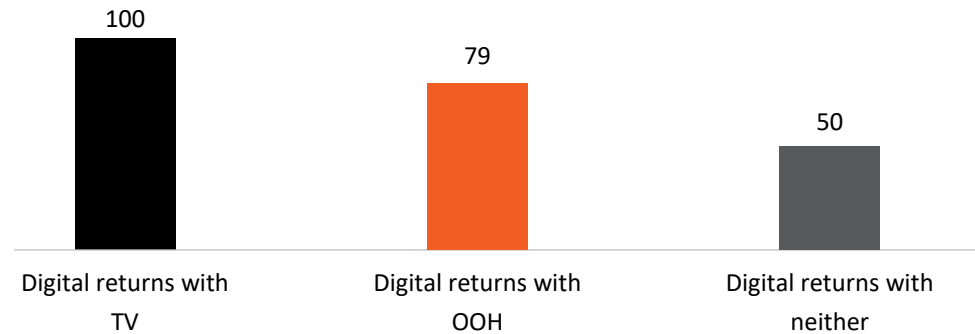


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ADVERTISERS NOW UNDERSTAND THAT THERE IS A BIG IMPACT ON DIGITAL IF TV OR OOH IS REMOVED

ROI Index of digital campaigns with or without offline support - Australia



SOURCE: COLLECTED MIX MIDELS FROM THE LEADING EDGE & ANALYTIC PARTNERS 2002-2018

TOTAL MEDIA ROI GROWS SIGNIFICANTLY WHEN % INVESTMENT IN OOH GROWS



SOURCE: COLLECTED MIX MIDELS FROM THE LEADING EDGE & ANALYTIC PARTNERS 2002-2018

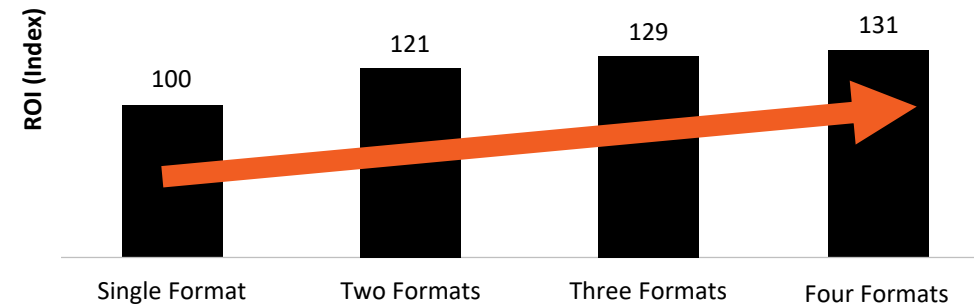


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THE COMBINATION OF A MULTI OOH APPROACH IS **POWERFUL**

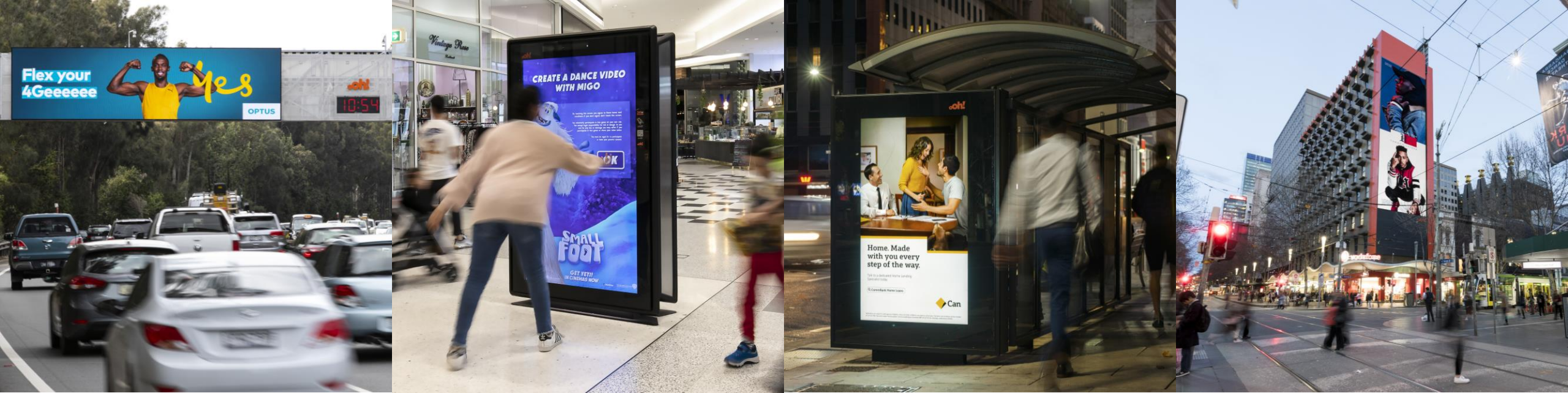
ROI strategy comparison within OOH



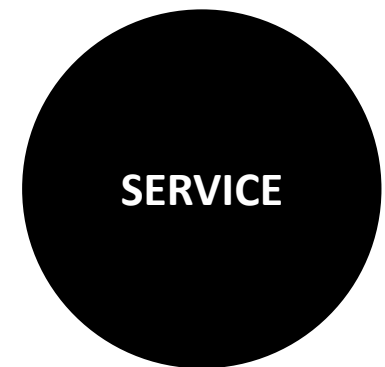
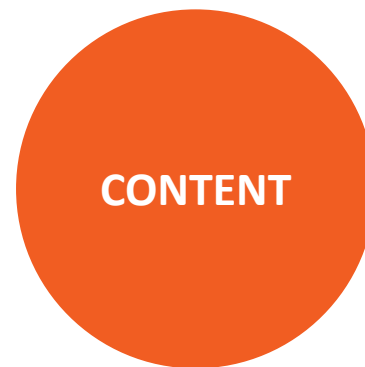
SOURCE: COLLECTED MIX MIDELS FROM THE LEADING EDGE & ANALYTIC PARTNERS 2002-2018



**HOW WILL
WE GROW OOH TO
10% SHARE OF
TOTAL MEDIA
SPEND**



ooh! COMPETITIVE ADVANTAGES - ECOSYSTEM



oOh! COMPETITIVE ADVANTAGES – DATA

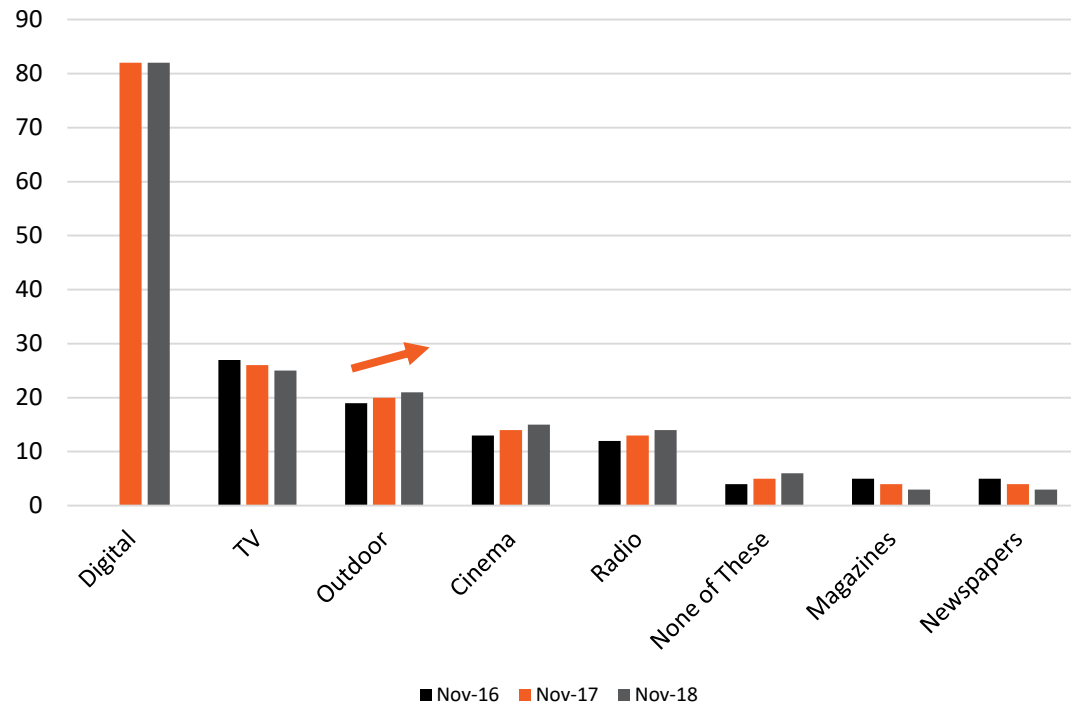


DSpark



oOh! COMPETITIVE ADVANTAGES – DATA

CREDIBLE AUDIENCE INSIGHTS & DATA



SOURCE: MEDIA | SURVEY – OCT 18

WHEN ASKED, CUSTOMERS WHO USE OOH, **CHOSE OOH!MEDIA** AS THE OOH LEADER IN DATA AND INSIGHTS

LEADER IN DATA & INSIGHTS - NATIONAL

Media Channels	Total
1 st oOh!media	38%
2 nd best OOH operator	14%
3 rd best OOH operator	13%



oOh!
COMPETITIVE
ADVANTAGES
-CONTENT &
CAPABILITY



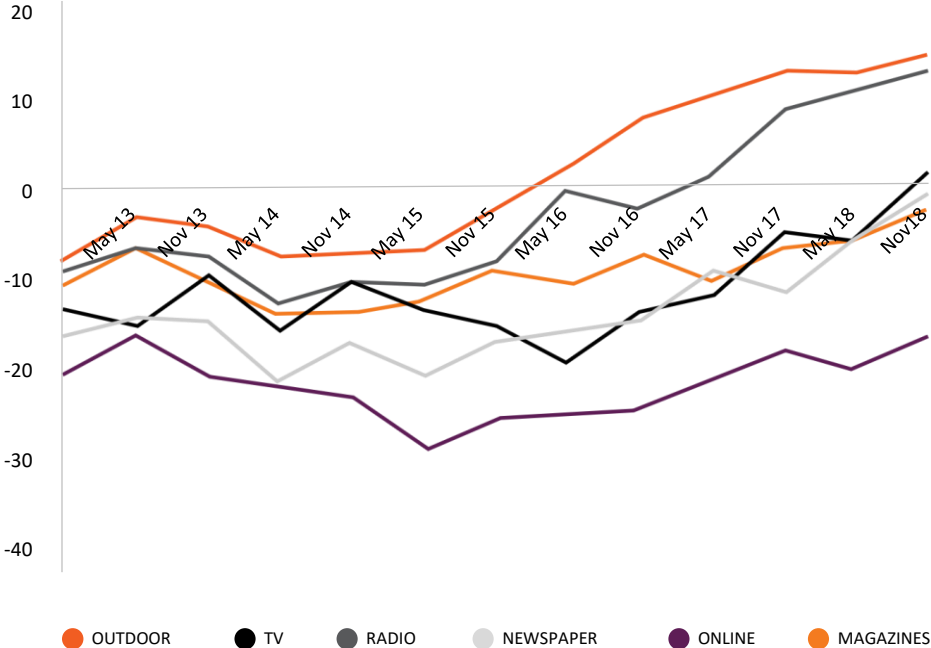


LEXUS

VICTORIAN RACING CLUB

OUR SERVICE IS BEING RECOGNISED BY OUR CUSTOMERS

NATIONAL NET PROMOTER SCORE BY CHANNEL



LEADER OOH/NET PROMOTER SCORE

OUT OF HOME	RANK	NPS
1 st oOh!media	1	35
2 nd best OOH operator	3	27
3 rd best OOH operator	4	25

SOURCE: MEDIA | SURVEY – OCT 18



2019 FOCUS

- **CONTINUE TO GENERATE CUSTOMER DESIRE BY BRINGING TO LIFE NEW WAYS TO USE OOH MEDIA**
- **SERVICE OUR CUSTOMERS' NEEDS WITH ENHANCED AUTOMATION**
- **INTEGRATION OF ADSHEL & SYNERGY REALISATION**
- **CONTINUE TO OPTIMISE OUR INVENTORY (GEOGRAPHY AND FORMAT)**

SUMMARY

OOH IS A POWERFUL MEDIA CHANNEL WITH CONSISTENT ABOVE MARKET GROWTH

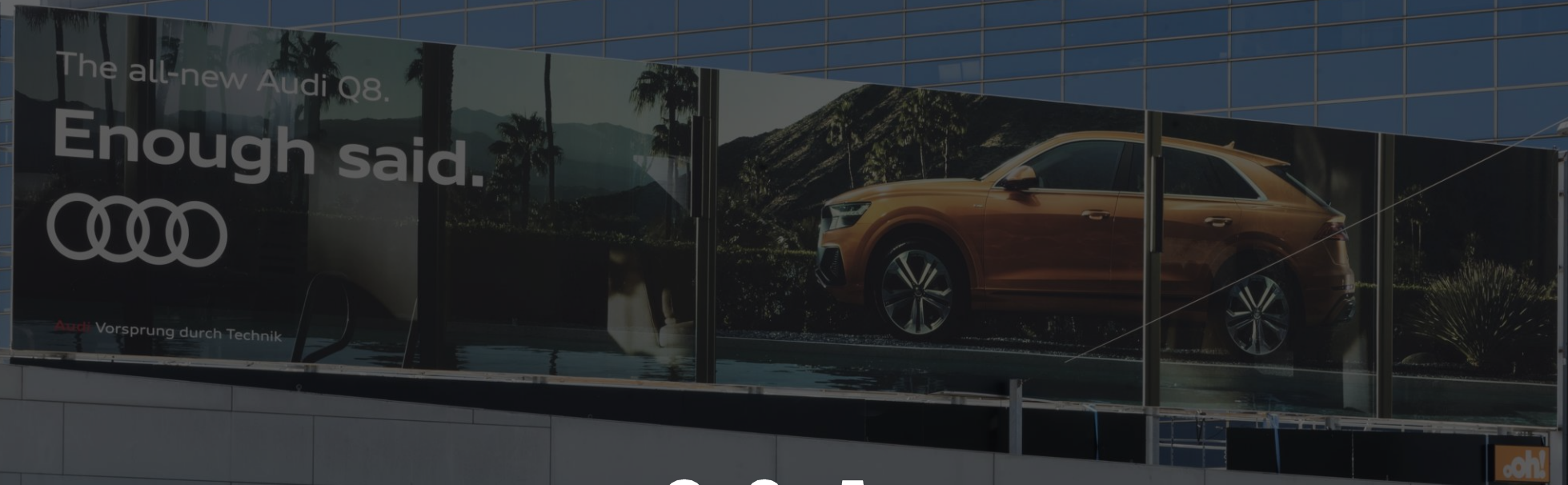
INCLUSION OF OOH IS PROVEN TO INCREASE ADVERTISERS' OVERALL CAMPAIGN RETURN ON INVESTMENT

MULTI-FORMAT OOH CAMPAIGNS INCREASE ADVERTISERS RETURN ON INVESTMENT OVER SINGLE FORMAT OOH CAMPAIGNS

oOh! HAS BUILT THE NEW OOH COMPANY TO LEVERAGE AND LEAD THIS GROWTH OPPORTUNITY:

- **DATA-DRIVEN**
- **MULTIPLE FORMATS**
- **CONTENT AND CREATIVE**
- **TECHNOLOGY ENABLED FOR SCALABILITY AND SPEED**

oOh! BRINGING THIS FULL VISION TO LIFE 2019-2020



Q & A





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