

Ströer opens the Door
to Digital OoH-Media

Investor´s Day
Ströer Out of Home Media
Udo Müller, CEO

Cologne, October 11th



Creating a Unique Digital Platform



Locations for Digital Media

Train- and Metro-Stations



Shopping-Malls



Airports



Focus on indoor due to frequencies, target groups and perception.

Frequencies at different locations in Germany

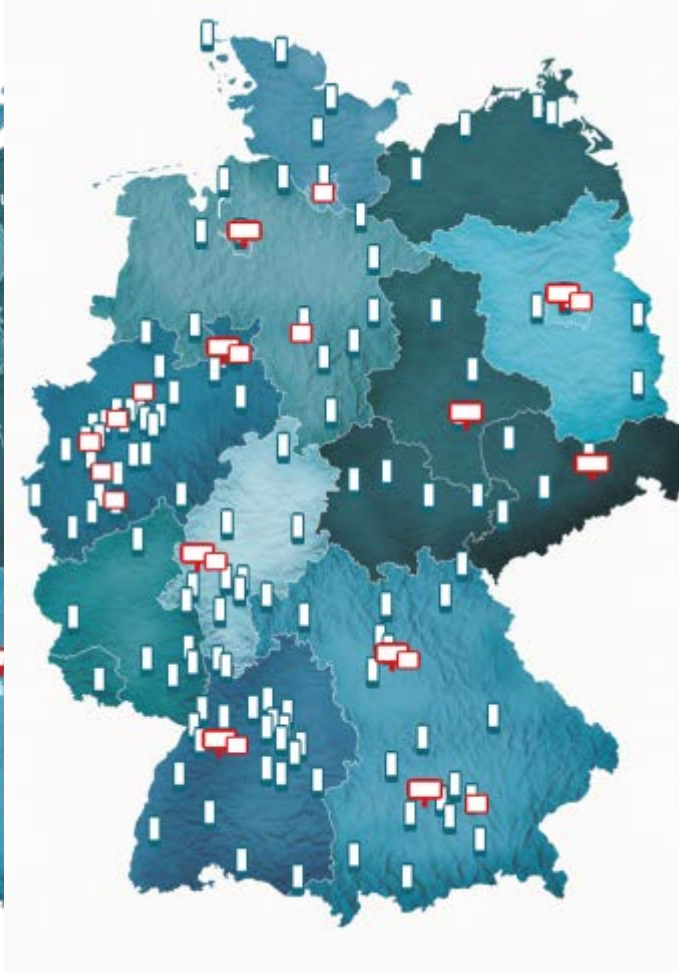
	Frequencies per week
All Train-Stations	125 Mio.
Top 200 Train-Stations e.g. Hamburg main station	69.2 Mio. 3.15 Mio.
Metro-Stations (12 cities) e.g. Munich Marienplatz	39.8 Mio. 1.26 Mio.
Airports e.g. Frankfurt e.g. Munich	3.1 Mio. 1.01 Mio. 0.6 Mio.
Malls e. g. ECE (95 malls) e.g. mfi (25 malls)	35 Mio. 16.75 Mio. 3.3 Mio.

Train-Stations and Metro-Stations are the most important locations for digitalization.
Malls are the second most important locations for digitalization.
Airports have lower frequencies but a valuable business target-group.

Building the Backbone of Digital OoH-Media



Infoscreen/ Metro-Stations

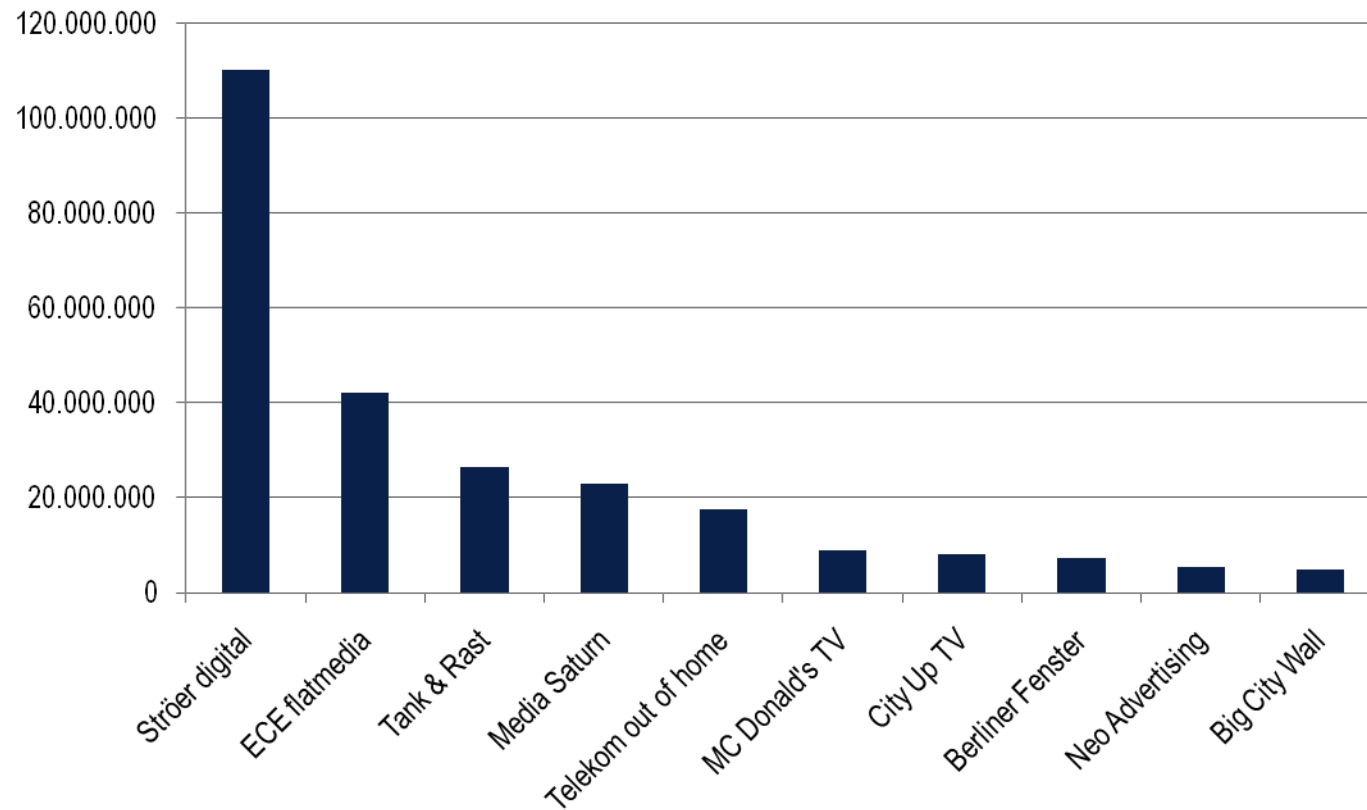


National Coverage



OoH-Channel/ Train-Stations

Gross-contacts of Players at the Digital OoH-Market



Gross-contacts per week, Source: invidis



Waiting-Situation at Train-Stations: Intensive Perception of Ads and Content
Munich, Ostbahnhof



Waiting-Situation at Train-Stations: Intensive Perception of Ads and Content
Frankfurt, Konstabler Wache



INFOSCREEN

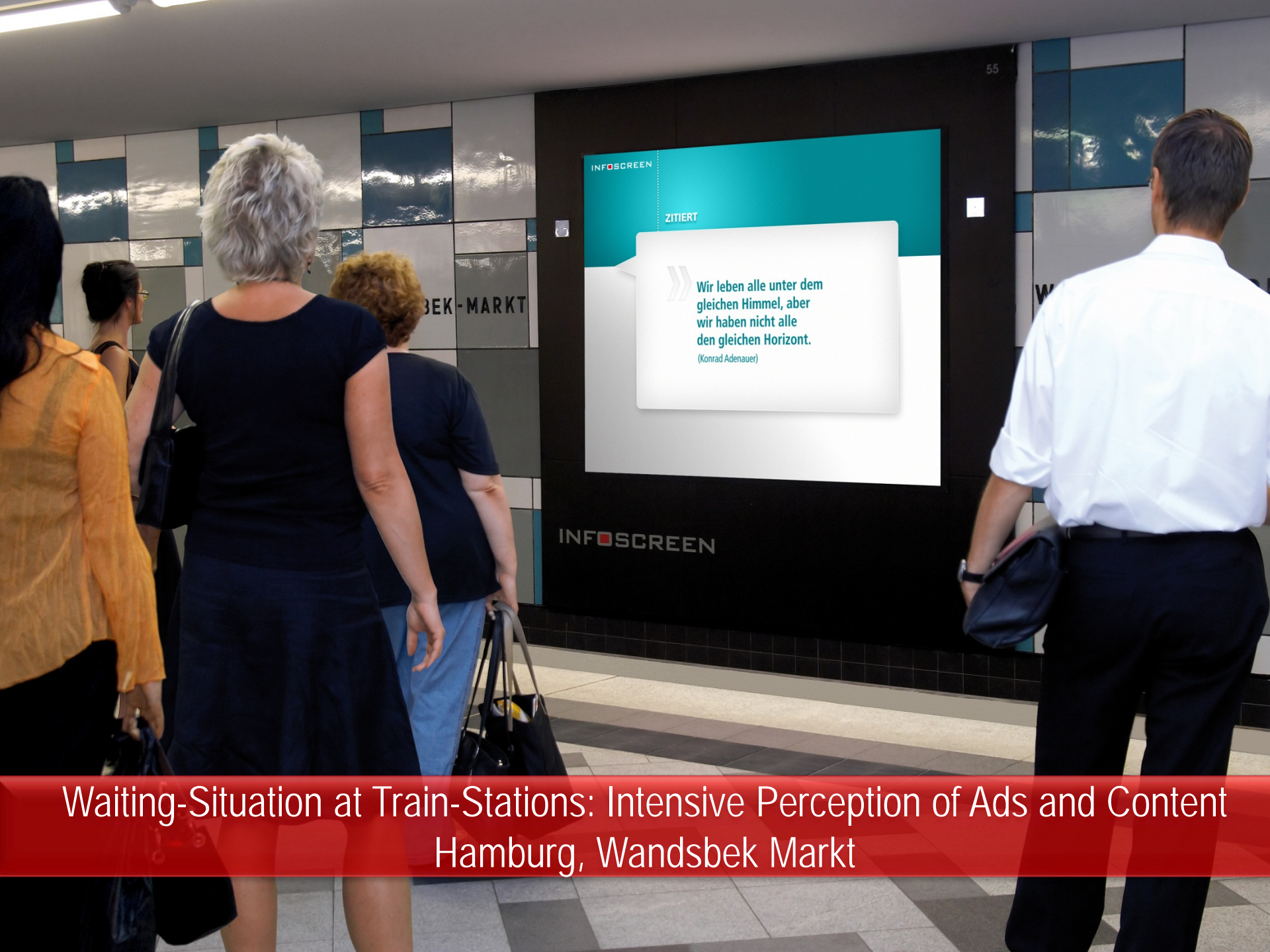
BÖRSENKÜRSE

DAX	7.187	▲ +0,22 %
Tec DAX	889	▼ -5,94 %
DOW JONES	12.076	▼ -0,28 %
NASDAQ	2.250	▲ 0,00 %
€ in \$	1,35	

Stand: 16.00 Uhr
Quelle: vwdgroup

INFOSCREEN 800-333 40 50

Waiting-Situation at Train-Stations: Intensive Perception of Ads and Content
Berlin, Potsdamer Platz



INFOSCREEN

ZITIERT



Wir leben alle unter dem gleichen Himmel, aber wir haben nicht alle den gleichen Horizont.
(Konrad Adenauer)

INFOSCREEN

Waiting-Situation at Train-Stations: Intensive Perception of Ads and Content
Hamburg, Wandsbek Markt

Sp.
2612

INFOSCREEN

WARTEN & RATEN

Wie heißt die Frucht der Heckenrose?

A Hagebutte

B Quitte

C Stachelbeere

INFOSCREEN

☎ 02

Waiting-Situation at Train-Stations: Intensive Perception of Ads and Content
Cologne, Neumarkt



Waiting-Situation at Train-Stations: Intensive Perception of Ads and Content
Munich, Goetheplatz



Passage-Situation at Train-Stations: High Reach and visual Dominance

Frankfurt, Main Train Station



Passage-Situation at Train-Stations: High Reach and visual Dominance
Munich, Main Train Station



Passage-Situation at Train-Stations: High Reach and visual Dominance

Berlin, Main Train Station



Passage-Situation at Train-Stations: High Reach and visual Dominance
Cologne, Main Train Station



Passage-Situation at Train-Stations: High Reach and visual Dominance

Düsseldorf, Main Train Station

The USP: Moving Pictures Out of Home

Media for
Waiting-Situations

Media for Passage-
Situations



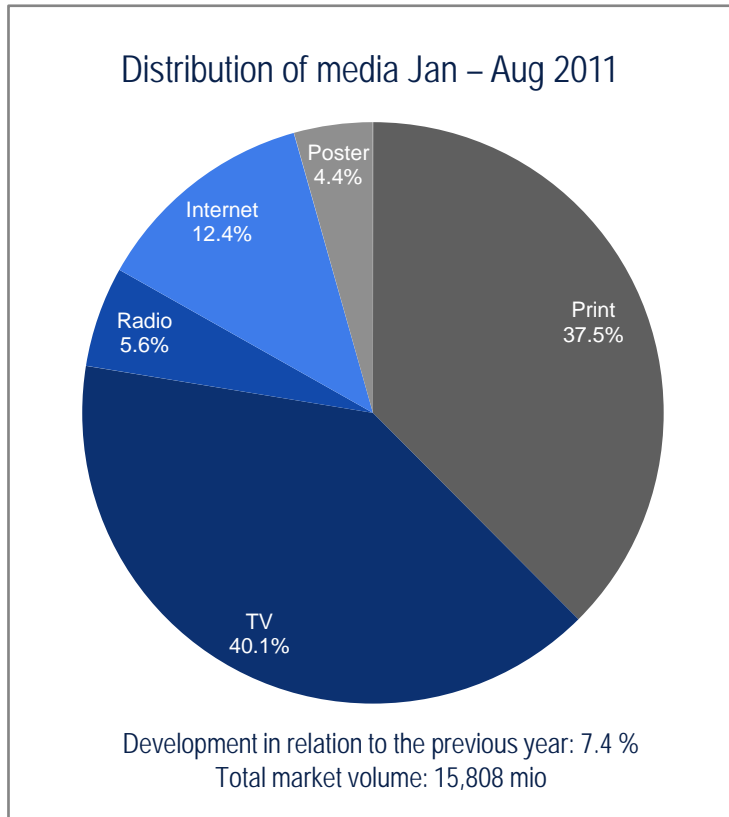
10-minutes-Loop

- Ads (180 seconds)
- Content (420 seconds)

3-minutes-Loop:

- Ads (150 Seconds)
- Content (30 Seconds)

Germany's Media-Marketshares



TV is the dominant player in Germany's media market.

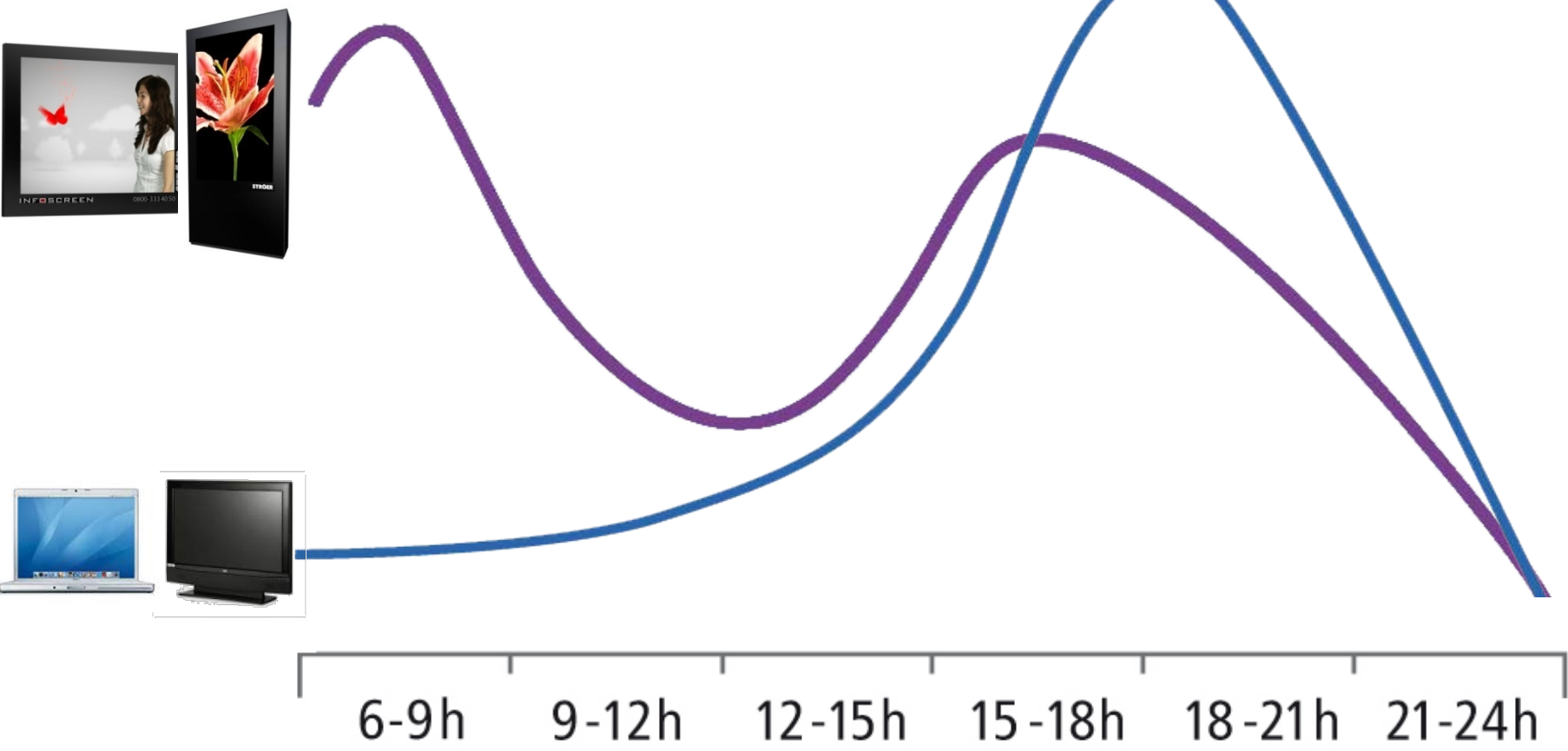
More than 40% of ad-spending (gross) takes place in TV.

Moving Pictures have become the main driver of online-sales (BVDW 21.9.2011)

Out-of-home grows slowly in general but fast in digital media.

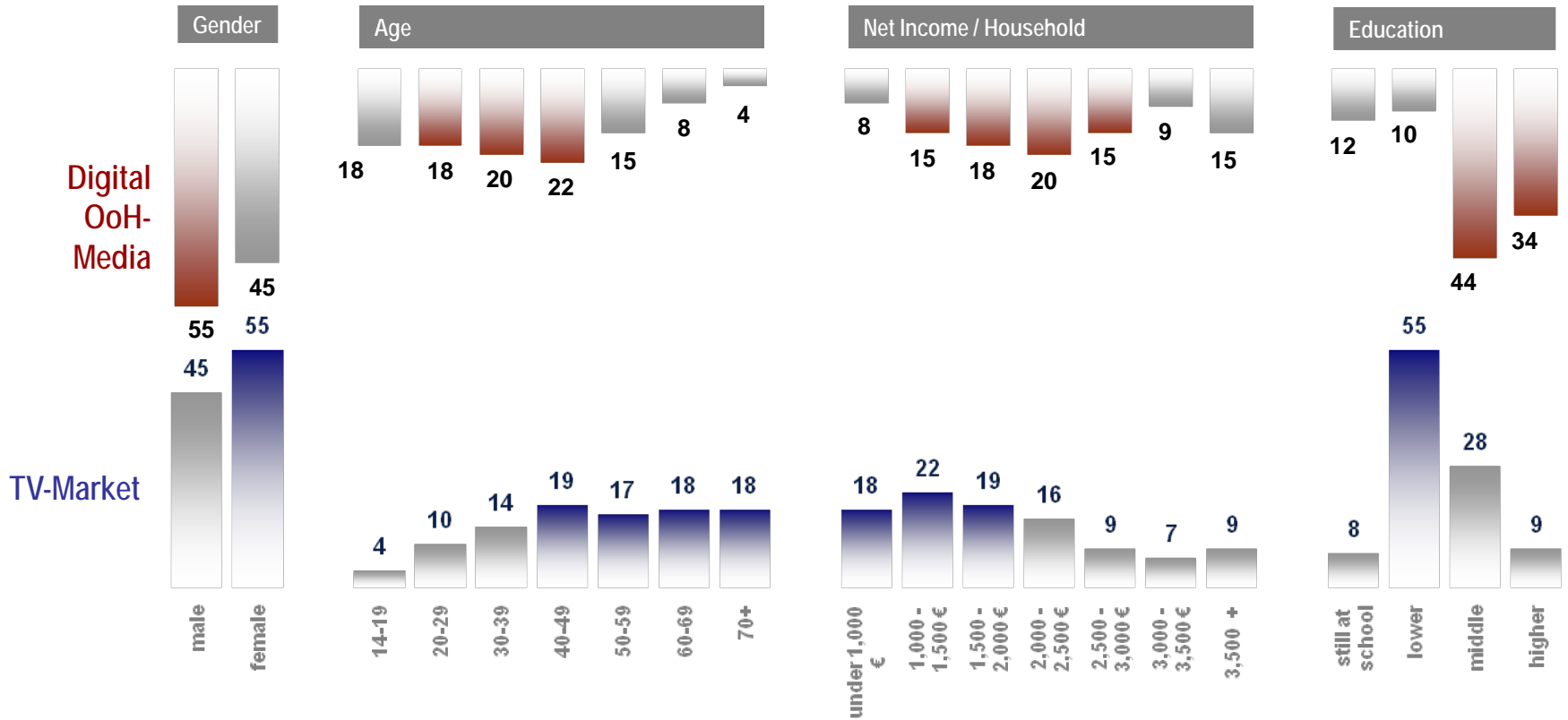
Source: Nielsen Media Research 09/2011

Complementary OoH-Usage of Digital Media to TV and Online



Source: Infoscreen-Study

Complementary Target Groups at Digital OoH



Source: AGF TV-Reach, July 2009; example infoscreen

Customer-Benefit: Extending TV-Campaigns

- Contact to mobile target groups
- Gain of net reach in target groups
- Intensified contacts
- Close to PoS
- Spot also OoH in highest quality (HD)

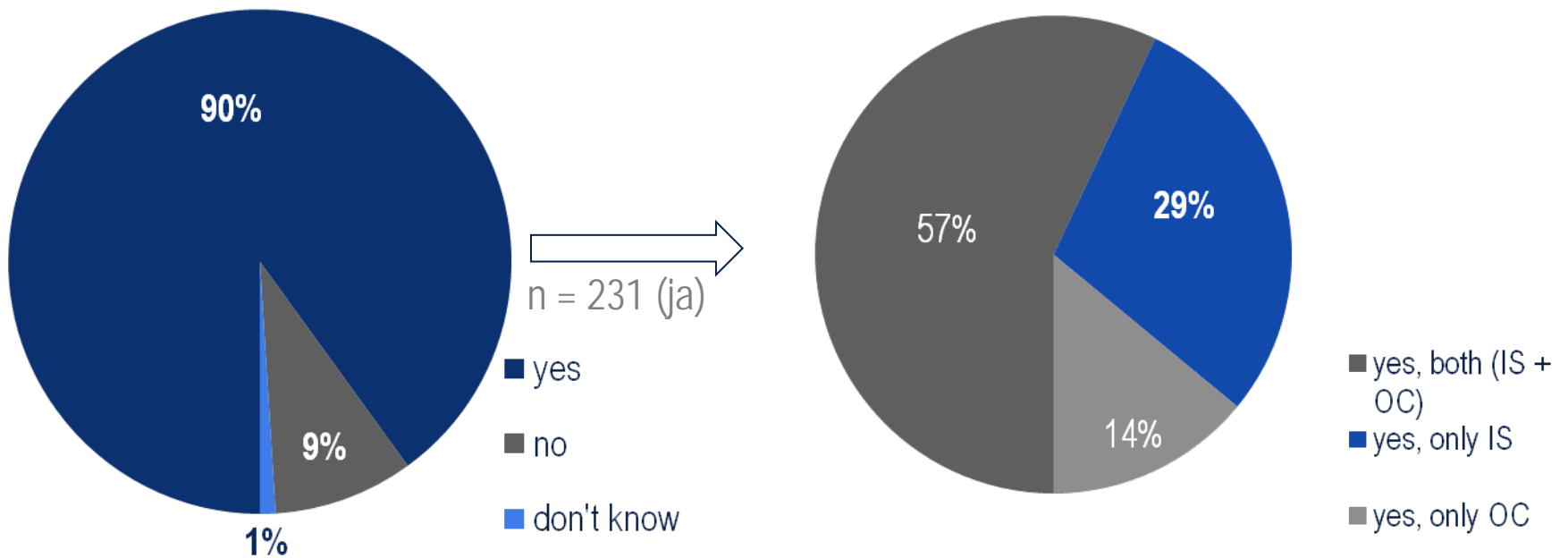


Best Practice: The Samsonite-Case



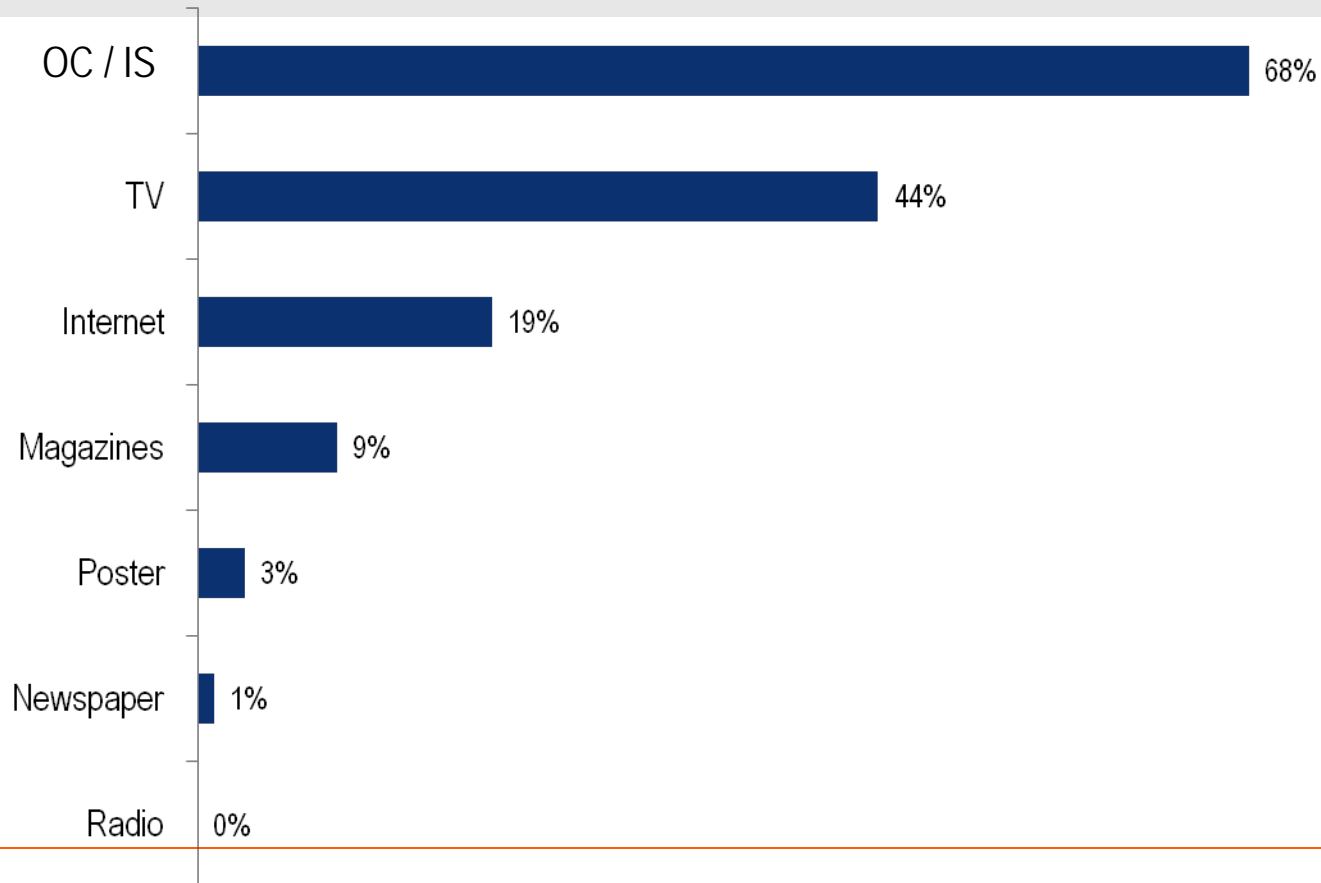
OoH-Channel and Infoscreen attract attention

Question: „Did you notice digital screens in railway-, S-Bahn- and Metro-stations?“
(n = 256, all respondents, n = 231, noticed the screens, posttest)



Very high Awareness of Digital Media

Question: „In wich media did you recognize the Samsonite-campaign?“
(n = 79, recognition of Samsonite-Spots, posttest)



Digital OoH- and TV-campaigns have a positive effect on Sales



Dirk Schmidinger
General Manager Samsonite Deutschland



„We placed our campaign on TV and digital Out-of-home-media for the first time in July 2011. The results were tremendous. One of the products we put on air became a top-seller right away!“

„.... looking at the general question if our campaign for travel gear was recognized the valuation of Samsonite rose from 4% to 31%. We are more than pleased with both the increase of the impact-indicators as well as of the return of invest of our campaign.“



STRÖER digital

