

People and Initiatives

Key Drivers of Sales and Marketing

Capital Markets Day, 11.10.2011



STRÖER
out of home media



Agenda

1 People

2 Initiatives

- Key Product Initiative: Digital / Out-of-Home Channel
- Key Product Initiative: Premium Billboards
- Key Sales Initiative: Top 200 Advertisers
- Sales Support Initiative: Ströer Roadshow 2011
- Sales Support Initiative: Sales Promotion Q4
- Demand & Activation Co-Operation with United Internet

A strong sales & marketing force for handling complexity effectively

	Poster					Transport	Digital
National Sales & Central Marketing c.176	Media Agencies					New Business	
						<ul style="list-style-type: none"> > Focussed on developing new relationships and gaining additional accounts 	<ul style="list-style-type: none"> > Manages special needs of transport-biased customers > Manages special requirements in logistics and technical support for transport clients
Regional Sales c.267	Advertisers						
						<ul style="list-style-type: none"> > Targets a variety of sectors, both regional and national > Targets direct advertiser relationships 	<ul style="list-style-type: none"> > Dedicated specialist team based in Munich > Specialists in moving picture advertising units located primarily in railway stations and local metros > Manages advertising sales, maintenance as well as rollout and sourcing of Infoscreen units > Strong contribution to securing demand for new digital moving picture products
	East	South	South/West	West	North		

Ströer Germany: Unique sales and marketing power in the media market

Headquarter (Cologne)

- > Key Account Management
- > Special Sales Transport Media
- > Special Sales Digital Media
- > New Business Team
- > Sales Team Special Agencies
- > Sales Marketing
- > Sales Disposition

150 employees

41 Regional Offices

- > North
- > East
- > South
- > South-West
- > West
- > Regional Sales Management
- > Regional Sales Marketing

267 employees

Infoscreen (Munich)

- > National Sales Team
- > Regional Sales Team
- > Disposition

26 employees

Our sales and marketing force is perfectly set up for the different challenges

Headquarter (Cologne)

- > The Key Account Management is addressing the big international agency networks and is managing almost 1000 big advertising spenders.
- > We understand the business model of our clients, analyse their needs and act tailor made for them.
- > This guarantees sustainable growth – clients are loyal.

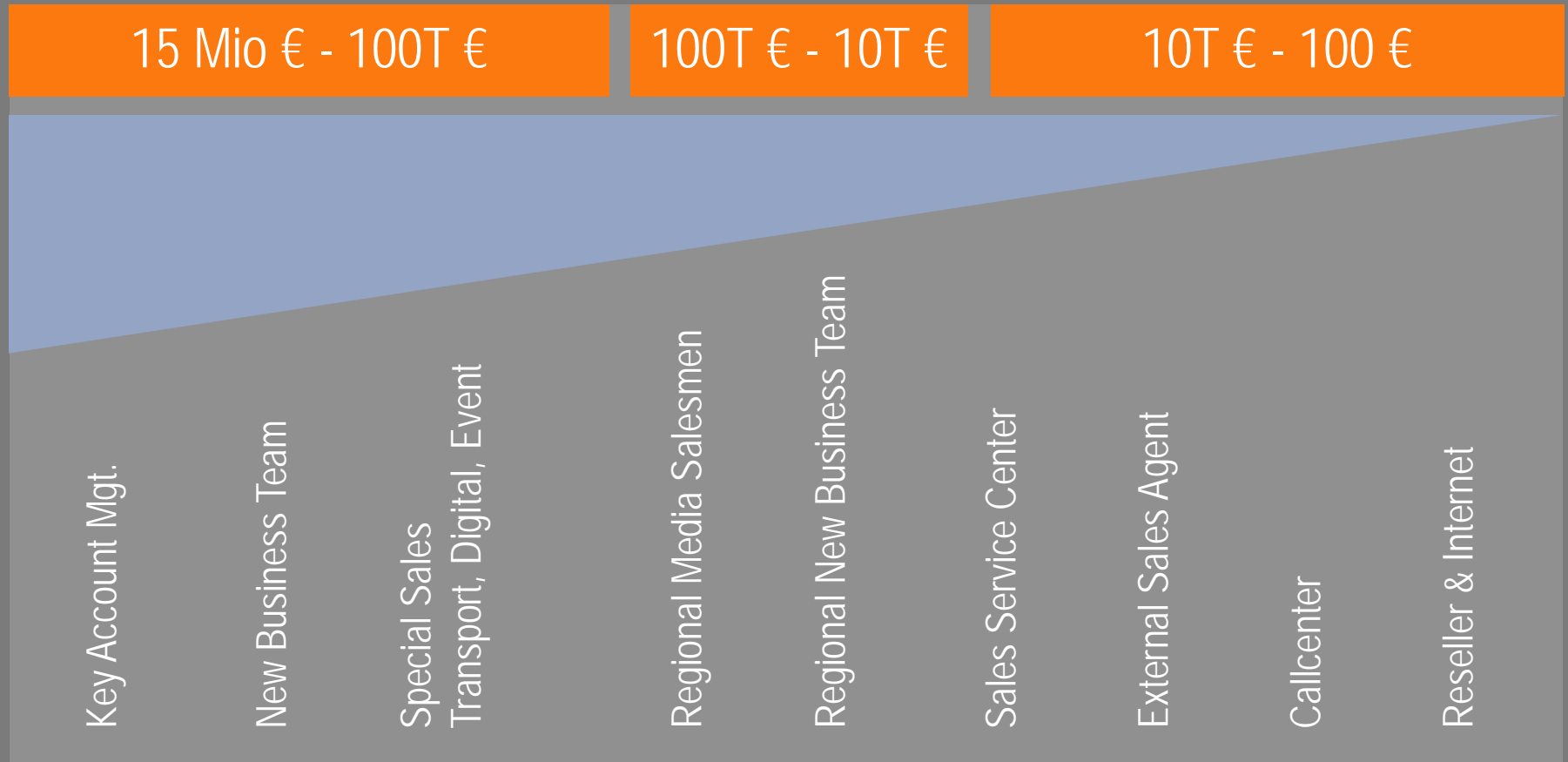
41 Regional Offices

- > We are in direct neighbourhood of 30.000 regional clients and have regional and local knowledge.
- > Regional turnover is very important:
 - it is less volatile,
 - follows the macroeconomic trends much slower and
 - makes us independent from the big agency networks.

Infoscreen (Munich)

- > Digital sinage is the future. Infoscreen is market leader in digital out-of-home.
- > Digital OOH-Media is enabling us to guarantee intermedial growth and is targeting budgets of the big TV-spenders.

The right answer for each client segment



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Ströer Infoscreen becomes Ströer Digital

- > All Ströer's digital products are centrally managed out of our Munich division Ströer Infoscreen
- > The digital focus and commitment will be reflected by rebranding Ströer Infoscreen as Ströer Digital
- > „Infoscreen“ will remain in use as a product brand

STRÖER  digital



Key Product Initiative: Out-of-Home Channel

- > Installations running as planned
- > Excellent door opener for winning client budgets from the Top 200 list
 - Ferrero
 - Procter & Gamble
 - Müller Milch
 - Bayer
 - Deutsche Telekom
 - Intel

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Der Golf unter den Cabrios.
Das neue Golf Cabriolet.



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Key Product Initiative: Premium Billboard

- > Installation running as planned
- > New super-size format available
- > From the Premium Billboard client list
 - Mc Donald's
 - Volkswagen
 - Media Markt
 - Opel
 - Unilever
 - Coca-Cola



Hamburg, Simon von Utrecht Straße



Bonn, Bahnhofstrasse



Köln, Neusser Strasse



Hamburg, Budapest Strasse



Bonn, Bornheimer Straße



München, Marienplatz

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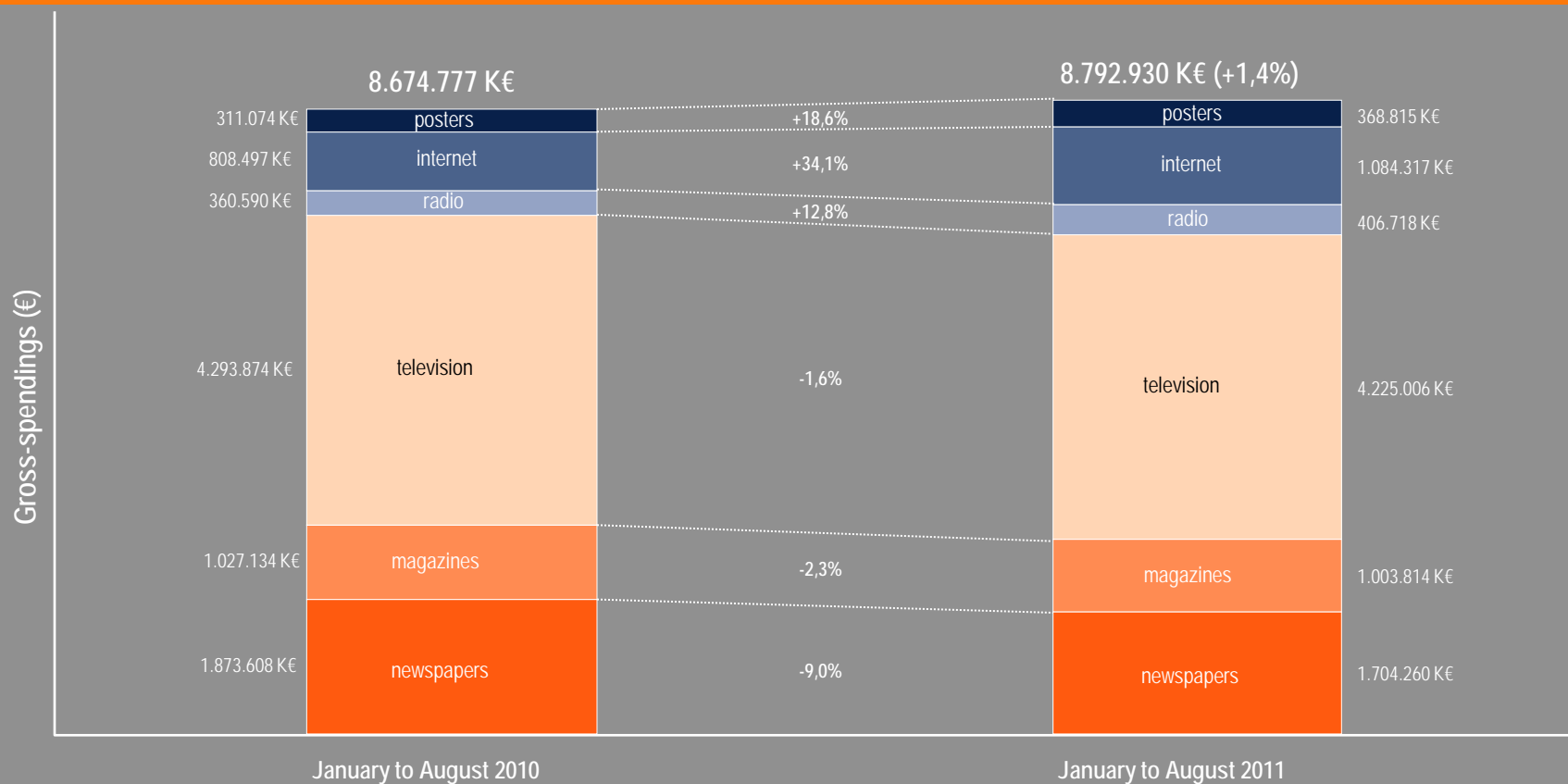


Key Sales Initiative: Top 200 Advertisers

- > Nielsen Top 200 increase gross outdoor spend by almost 19% from January to August 2011 versus 2010
- > Strongest segments
 - Automotive (Ford, Opel, BMW)
 - Retail (Otto, Saturn, C&A)
 - FMCG (Beiersdorf, Radeberger, Inbev)
 - Electronics (Sony, Nintendo, Apple)

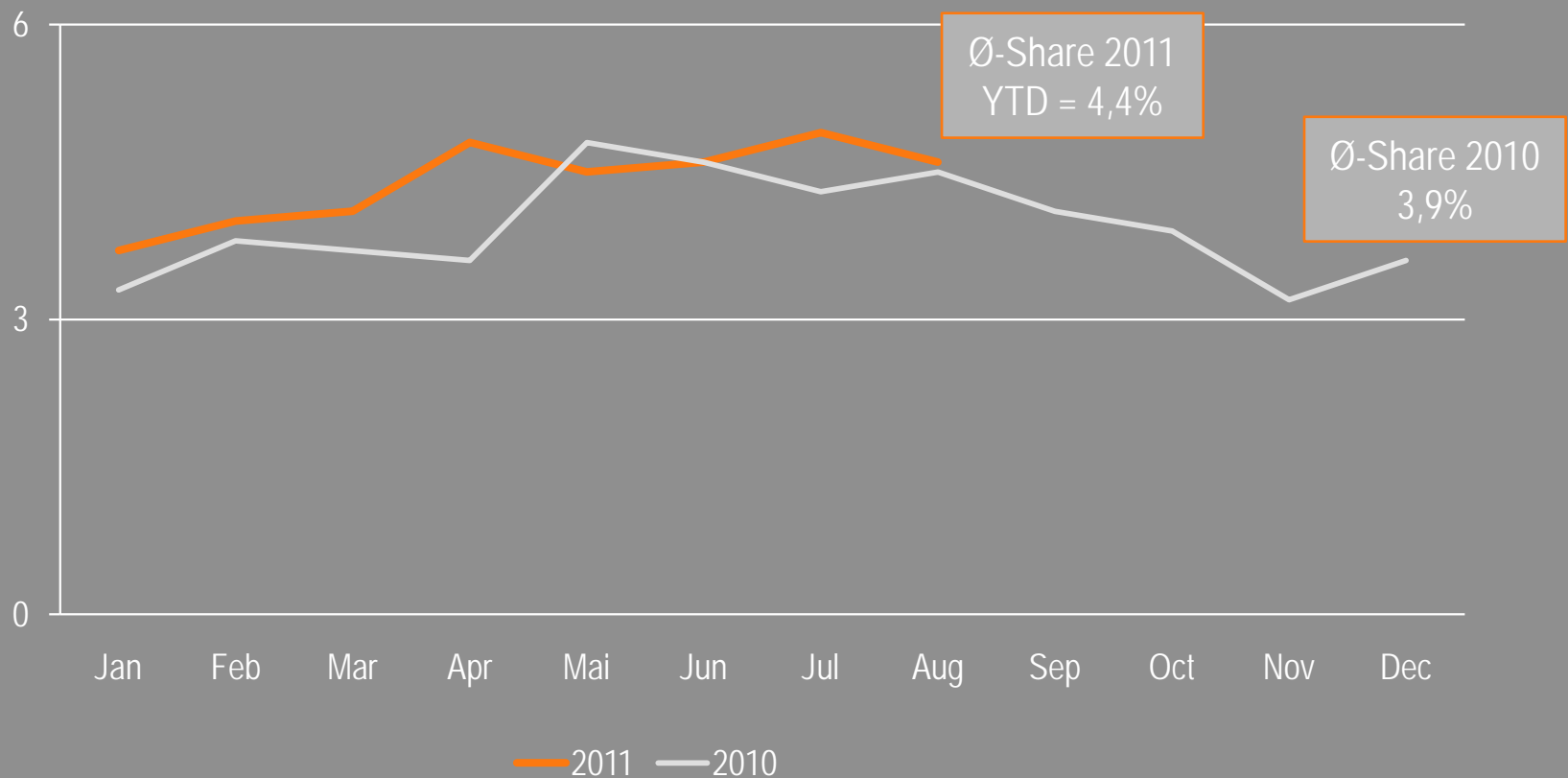
Nielsen Top 200 increase outdoor spend by 18.6%, total market only grows by 1.4%

Development of gross spendings Jan - Aug 2011 versus Jan - Aug 2010



The outdoor share in the media mix grows continuously

Development of outdoor share 2010 versus 2011 YTD



HOTEL HAFEN HAMBURG

**BEQUEM
AUF BESTELLUNG**
Otto... findet ich gut

479⁹⁹

OTTO

**PRIVILEG
AUF BESTELLUNG**
Otto... findet ich gut

OTTO

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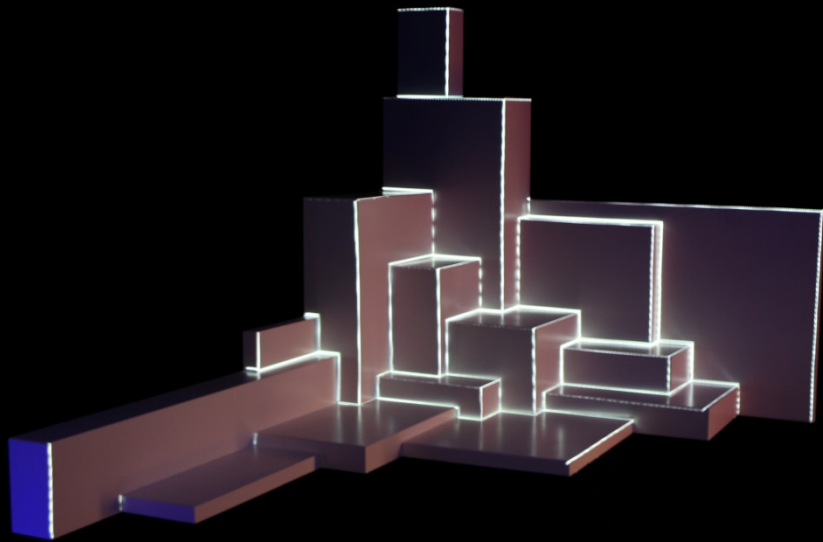
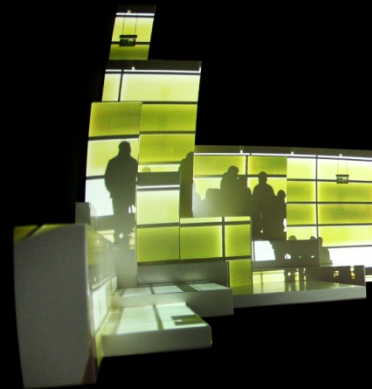
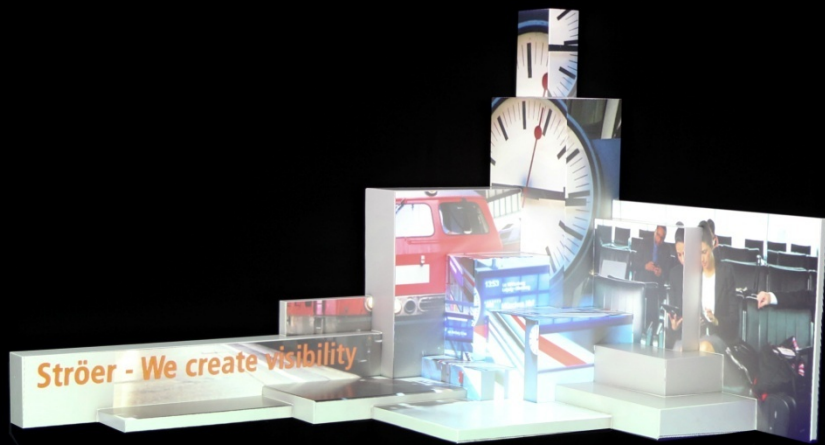
UNUSUAL HABIT

STRÖER Media News Update 2011
Hamburg Düsseldorf Frankfurt München



Sales Support Initiative: Ströer Roadshow 2011

- > Four events for decision makers from the advertiser and agency side
 - Hamburg, 11.8.
 - Dusseldorf, 18.8.
 - Frankfurt, 23.8.
 - Munich, 31.8.
- > A highly entertaining program demonstrated the power of outdoor advertising to 600 guests
- > Very positive reaction to unusual approach









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Wünsche wecken mit Out-of-Home

Out-of-Home Angebote
4. Quartal 2011

Datum / Redner

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Out-of-
Home



Online



Demand
&
Activation

Demand & Activation Co-operation: A new synergetic planning and buying approach for advertisers

- > Based on micro geographic data available to Ströer and United Internet, congruent target groups can be located precisely in real and digital space
- > Against this background, outdoor campaigns can be prolonged into the virtual world, increasing advertising effectiveness efficiently (Multiplying Effect)

- > Alternatively, imageries which have been built up with outdoor (Demand) can be turned into concrete sales impulses online (Activation)
- > The unique co-operation of Ströer and United Internet will enable advertisers to support all communication goals along the consumer pathway with a high-reach outdoor/online media mix

Outdoor & online: Ideal partners in the media mix

Outdoor

- ✓ Fast, high reach
- ✓ Awareness, emotion, impact
- ✓ Excellent regional and local targeting
- ✓ Involvement and buying impulse



Online

- ✓ Strong in activation
- ✓ Multi-sensoric + informational detail
- ✓ Feedback-channel + precise targeting
- ✓ Mass channel + E-commerce platform



Two strong partners, one convincing approach: Our partner United Internet Media at a glance

- > Leading digital sales house with top portals WEB.DE, GMX, 1&1
- > Fast build-up of reach for impactful campaigns with more than 16 million users per week and more than 26 million users per month

- > Second largest video distributor in German internet
- > TGP® – Owner of leading online targeting technology in Germany since 2004

