2017 FACTS AND FIGURES

OUTDOOR MEDIA ASSOCIATION

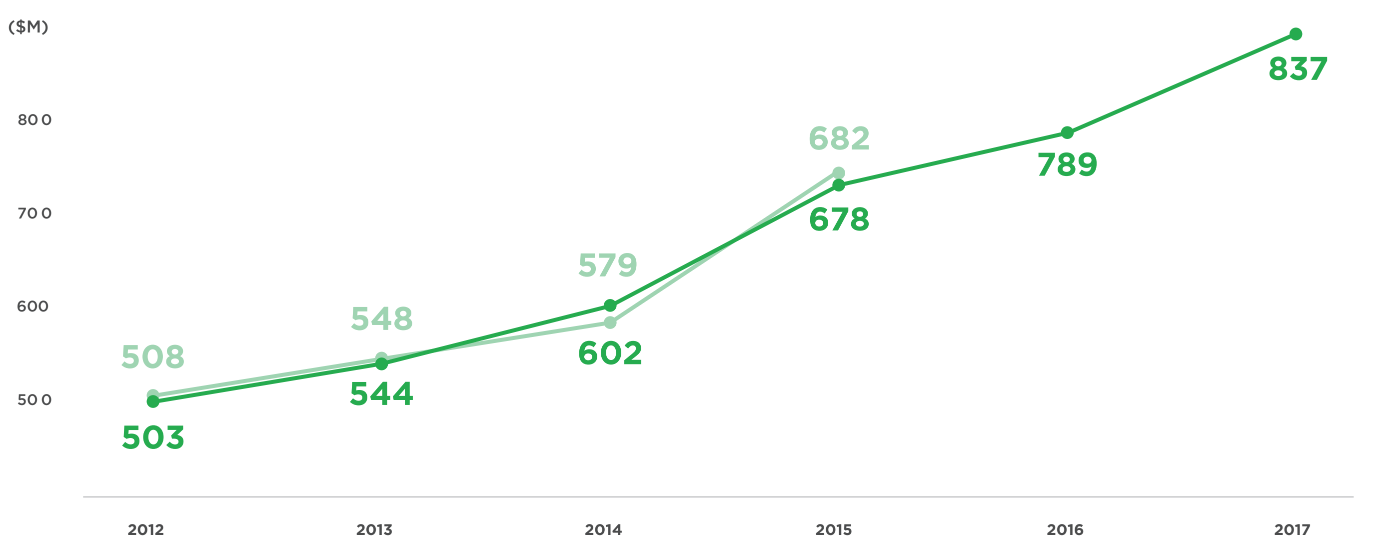
# Growth continues

## OUT OF HOME'S EIGHTH CONSECUTIVE YEAR OF GROWTH

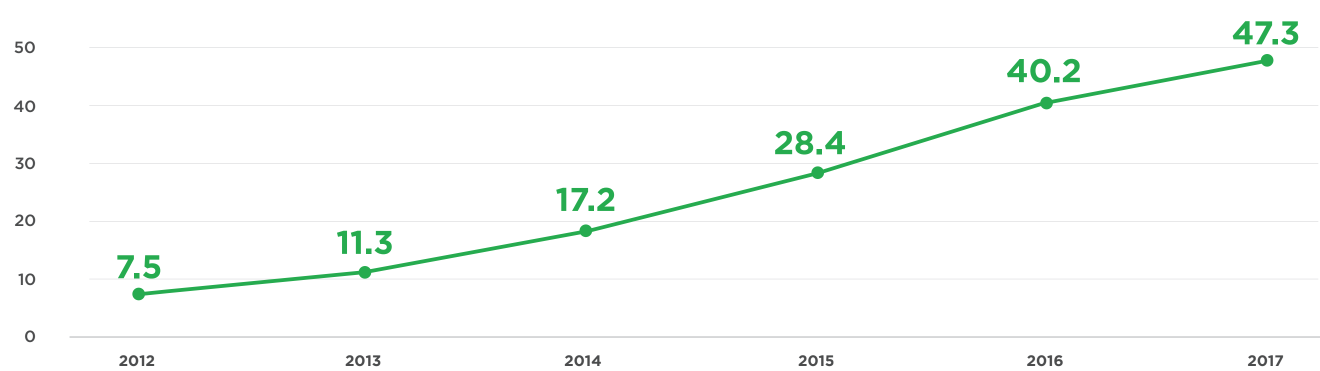
In 2017 Out of Home (OOH) net revenue rose 6% to $837 million. Share of media also increased to 5.9% compared to 5.7% in 2016. The demand for immediacy and flexibility continued to drive the share of revenue for digital out of home (DOOH) to represent 47.3% of total revenue.

## REVENUE RESULTS

TOTAL OOH REVENUE ($M) 2012 – 2017




DOOH AS A PERCENTAGE OF TOTAL OOH REVENUE 2012 – 2017




*Numbers were revised to reflect changes in OMA membership, allowing direct comparison in revenue year-on-year.

*The OMA is the peak industry body which represents most of Australia's Outdoor Media Display companies and production facilities, and some Media Display asset owners. The OMA generates performance reporting for the Out of Home industry through the compilation of revenue results and share of advertising spend for its members, which comprise approximately 80% of the revenue generated by the channel.*

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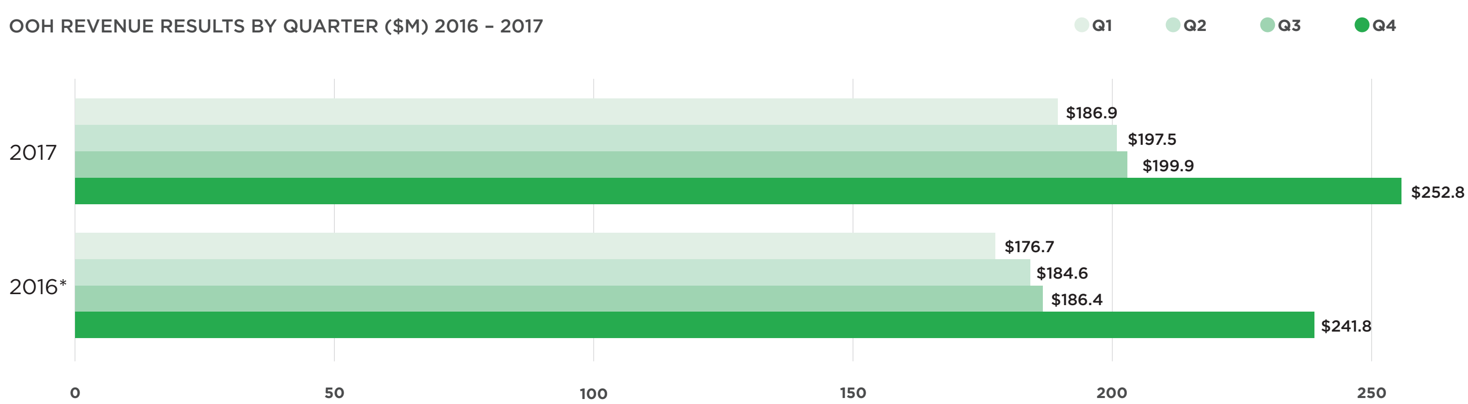
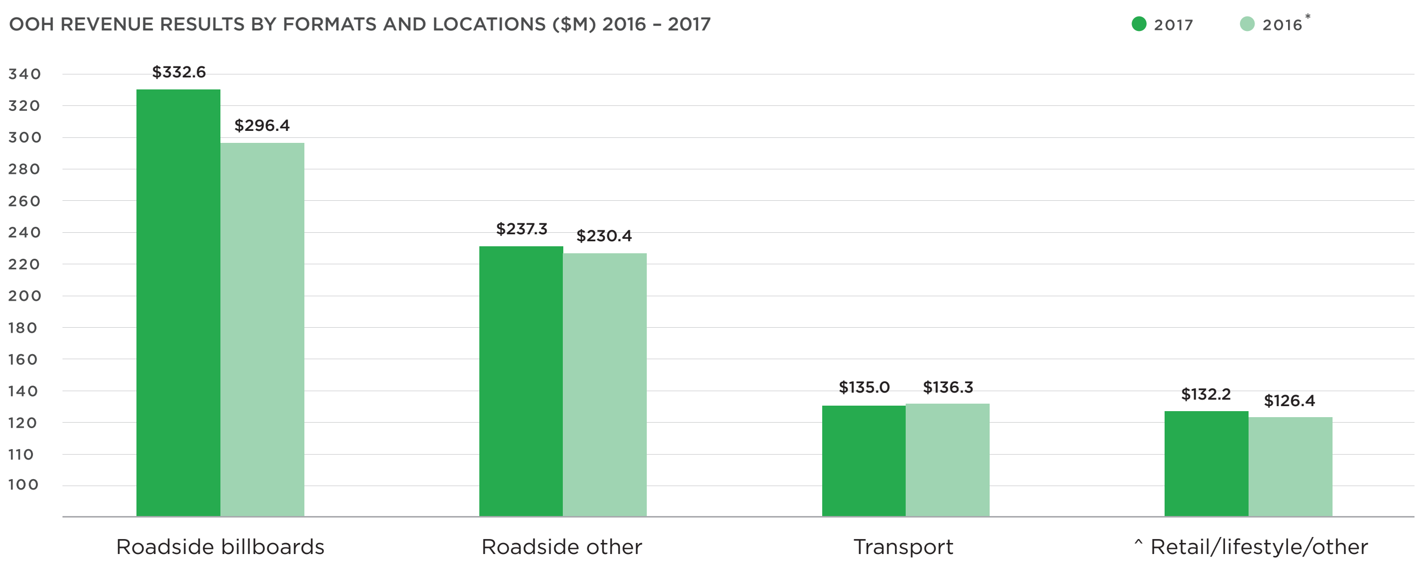
## PERFORMANCE BY QUARTER

OOH REVENUE RESULTS BY QUARTER ($M) 2016 – 2017




## PERFORMANCE BY FORMATS AND LOCATIONS

OOH REVENUE RESULTS BY FORMATS AND LOCATIONS ($M) 2016 – 2017




*^ This category reports shopping centre panels, as well as all place-based digital inventory including office media – covering inventory in lifts and office buildings, cafe panels, as well as digital screens in doctors' surgeries and medical centres.*

*Note: Rounding has been used for numbers in this report.*

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# Media share

## MEDIA SHARE CLIMBS TO 5.9%

### SHARE OF TOTAL REVENUE

Outdoor had a share of 5.9% in 2017 compared to 5.7% in 2016.

Online continued to receive the dominant share with 45.5% (44.4% in 2016). Television, the nearest other media, dropped share to 26.3% (27.6% in 2016).

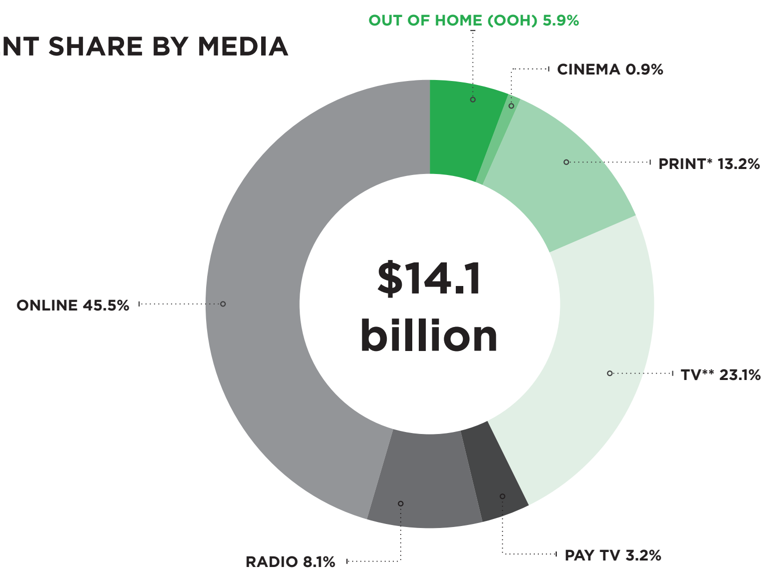
The top two (Online and Television) together are 71.8% of the total revenue in 2016 (72.0% in 2016 and 68.9% in 2015).

Print as a whole maintained 13.2% (13.0% in 2016), despite including $0.43B additional digital revenue in 2017.

**"The Commercial Economic Advisory Service of Australia (CEASA) report for 2017 shows OOH once again outperforming the total media spend growth, with a 6% growth in revenue vs total media growth of 2.8%. This result means OOH maintains its place in the top three revenue growth channels for 2017."**

**CHARMAINE MOLDRICH**
CEO, OMA AND MOVE

### PERCENT SHARE BY MEDIA




| | 2013 | 2014 | 2015 | 2016 | 2017 |
|---|---|---|---|---|---|
| OOH | 4.8 | 5.1 | 5.3 | 5.7 | 5.9 |
| CINEMA | 0.9 | 0.8 | 0.9 | 0.9 | 0.9 |
| PRINT* | 22.0 | 18.8 | 16.3 | 13.0 | 13.2 |
| TV** | 30.6 | 29.3 | 26.7 | 24.2 | 23.1 |
| PAY TV | 4.4 | 4.1 | 4.0 | 3.5 | 3.2 |
| RADIO | 9.0 | 9.0 | 8.7 | 8.3 | 8.1 |
| ONLINE | 28.4 | 32.9 | 38.3 | 44.4 | 45.5 |

*Source: CEASA (prior to 2017 this report excluded Classifieds and Directories for Print and Online).*

**Print changed reporting in 2017 to include Digital and Classifieds advertising revenue. Prior to 2017, Classifieds revenue was reported separately. In 2016, Classifieds made up 1.6% of the total print revenue figure.*

***TV includes Metro and Regional 2011 to 2015 and in addition AVOD (Advertising Revenue from Video on Demand) for the first time in 2016. AVOD was 0.6% of total spend in 2017.*

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# Out of Home's top ten

## TOP 10 SECTORS

| | | | ALL MEDIA | | | OOH | |
|---|---|---|---|---|---|---|---|
| **2017** | **2016** | **TOP 10 SECTORS** | **2017 $M** | **2016 $M** | **YOY%** | **2017 $M** | **%SHARE** |
| **1** | 1 | RETAIL | 1,895.3 | 1,922.5 | –1.4% | 89.3 | 4.7% |
| **2** | 2 | ENTERTAINMENT & LEISURE | 596.4 | 624.8 | –4.5% | 67.9 | 11.4% |
| **3** | 3 | MOTOR VEHICLES | 932.1 | 1,001.4 | –6.9% | 65.2 | 7.0% |
| **4** | 4 | FINANCE | 517.8 | 474.4 | 9.1% | 55.5 | 10.7% |
| **5** | 5 | COMMUNICATIONS | 431.8 | 375.0 | 15.1% | 44.3 | 10.3% |
| **6** | 6 | FOOD | 326.8 | 315.6 | 3.6% | 42.6 | 13.0% |
| **7** | 7 | TRAVEL/ACCOMMODATION | 784.3 | 663.9 | 18.1% | 40.0 | 5.1% |
| **8** | 8 | MEDIA | 247.3 | 259.5 | –4.7% | 29.6 | 11.9% |
| **9** | 9 | BEVERAGES-ALCOHOLIC | 83.0 | 74.3 | 11.7% | 28.3 | 34.1% |
| **10** | 11 | BEVERAGES-NON ALCOHOLIC | 114.6 | 118.4 | –3.2% | 27.0 | 23.6% |

## TOP 10 ADVERTISERS

| | | | ALL MEDIA | | | OOH | |
|---|---|---|---|---|---|---|---|
| **2017** | **2016** | **TOP 10 ADVERTISERS** | **2017 $M** | **2016 $M** | **YOY%** | **2017 $M** | **%SHARE** |
| **1** | 8 | COMMONWEALTH BANK | 44.7 | 31.2 | 43.4% | 9.7 | 21.7% |
| **2** | 11 | MONDELEZ INTERNATIONAL | 39.5 | 30.9 | 28.0% | 9.4 | 23.7% |
| **3** | 4 | MCDONALD'S FAMILY RESTAURANTS | 80.5 | 71.9 | 11.9% | 8.5 | 10.6% |
| **4** | 1 | SINGTEL | 30.8 | 43.0 | –30.0% | 8.4 | 27.4% |
| **5** | 54 | VODAFONE COMMUNICATIONS | 42.6 | 28.6 | 48.9% | 7.4 | 17.3% |
| **6** | 5 | ROADSHOW FILM DISTRIBUTORS | 31.8 | 34.6 | –8.3% | 7.1 | 22.5% |
| **7** | 13 | UNILEVER AUSTRALIA | 53.5 | 37.4 | 43.1% | 6.7 | 12.6% |
| **8** | 9 | TPG INTERNET PTY LTD | 17.5 | 24.2 | –27.7% | 6.6 | 37.6% |
| **9** | 7 | APPLE COMPUTERS | 30.1 | 27.2 | 10.4% | 6.4 | 21.4% |
| **10** | 10 | WOOLWORTHS SUPERMARKETS | 71.1 | 78.3 | –9.2% | 6.3 | 8.8% |

*Source: Nielsen Ad Intel 2017; Nielsen reserves the right to adjust ranking retrospectively.*

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