

ENERO GROUP AGM 2020

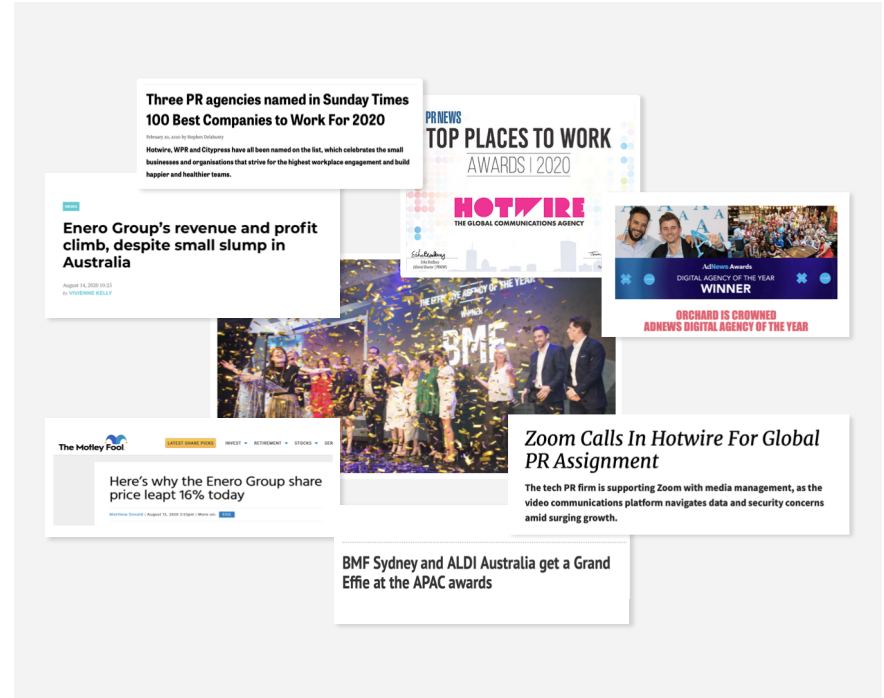
BRENT SCRIMSHAW
ENERO GROUP CEO

WORLD CLASS WORK DELIVERS WORLD CLASS RESULTS

GREAT WORK



GREAT RESULTS



A DEFINING MOMENT FOR THE BUSINESS

1-CLIENT PARTNERSHIPS WITH IMPACT

- Need for recovery driving hyper focus on growth and ROI (Global growth forecasted to decline from 3.0% to 2.4% - or USD 3.5tn in lost economic output).
- Partnerships underpinned by data led decision making and digital execution better satisfy demands from clients for more measurable outcomes.
- Market disruption is forcing new solutions to traditional client-agency relationships.

2- RACE FOR TRANSFORMATION

- Covid-19 pandemic has accelerated Companies' digital strategies by a global average of 6 years.
- High digital aptitude is now a price of entry for almost every category.
- Quality expertise and tech capability (data, AI, voice) is essential to deliver on growth expectations.

3- ELEVATED CONSUMER EXPECTATIONS

- Efficient 'experiences' rule (90% of customers expect consistent interactions across all channels).
- 86% of CMOs expect to own the end-to-end customer experience by end 2020.
- Need for enabling tech & actionable data skills.
- Responsible business practice drives brand preference.

4-CREATIVITY AS A MULTIPLIER

- Creative firepower remains an advantage to connect on an emotional, human level in digital times.
- Brookings Institute: Machines will least likely replace roles that require non-routine, social and emotional intelligence, human creativity and very high technical expertise.
- New definition of creative thinker required to problem-solve 'upstream'.

OUR AMBITION

CREATIVELY LED. DATA SMART. TECHNOLOGY ENABLED.

An Integrated portfolio of complimentary marketing services brands around the world.

OUR STRATEGY

1. INTEGRATION

2. TRANSFORMATION

3. ACCELERATION

OUR PRIORITIES

DRIVE ORGANIC & CROSS-GEO GROWTH

- Enero growth labs
- Cross-portfolio offering
- Cross-border expansion



ALIGN AND REWARD COLLABORATION

- Connected culture
- Reward collaboration
- Incentivise group Success



ZOETIS LAUNCHES NEW CAMPAIGN FOR SIMPARICA TRIO VIA ORCHARD AND BMF AUSTRALIA

FOCUS ON THE CORE

- International scale
- Extend core brand offering
- Priority for capital allocation



DOUBLE DOWN ON DIGITAL

- Invest in world class digital talent
- Prioritise for acquisition



ESTABLISH INNOVATION AGENDA

- Progressive and advanced tech mandate
- Focussed on new client solutions



BRAND PORTFOLIO

PR AND INTEGRATED COMMUNICATIONS

CREATIVE AND CONTENT

DIGITAL, DATA AND ANALYTICS

cpr
Creative
Government
Media

Frank.

HOTWIRE

bmf

orchard

o
bmedia

THE
LEADING
EDGE

CORE GROUP

enero

WELL POSITIONED IN GROWTH VERTICALS

CREATIVELY LED. DATA SMART.
TECHNOLOGY ENABLED.

RETAIL & STAPLES



GWF
George Weston
Foods Limited

Dulux

HEALTH & SOCIAL

zoetis



Australian Government



AUTO



FINANCE



TAL



Commonwealth Bank

Klarna.

Rest
INDUSTRY SUPER

TECH

McAfee



Adobe



QUALCOMM

NetApp

facebook.

TOURISM

agoda
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Tourism
Tasmania

vtic
VICTORIA TOURISM INDUSTRY COUNCIL

FY2021 TRADING UPDATE

Trading update for the three months ended 30 September 2020 (unaudited):

\$A million	YTD 30 Sept 2020	YTD 30 Sept 2019	Variance
Net Revenue	37.2	33.3	11.0%
Operating EBITDA	9.8	5.4	81.4%
Operating EBITDA margin	26.3%	16.2%	10.1 bps
EBITA	9.2	4.9	87.8%
EBIT	9.0	4.6	95.7%
EBIT margin	24.2%	13.8%	10.4 bps