

REGIONAL OPERATIONS



RICK LENARCIC



SOUTHERN CROSS AUSTereo

absolutely engaging

RadioWest

5SE963am

★ 104.9 star FM
THE BORDER

106.9
nxfm

Southern Cross Ten

Southern Cross
TELEVISION

8,336,832

POPULATION

\$337M

TOTAL AIRTIME
REVENUE

\$189M

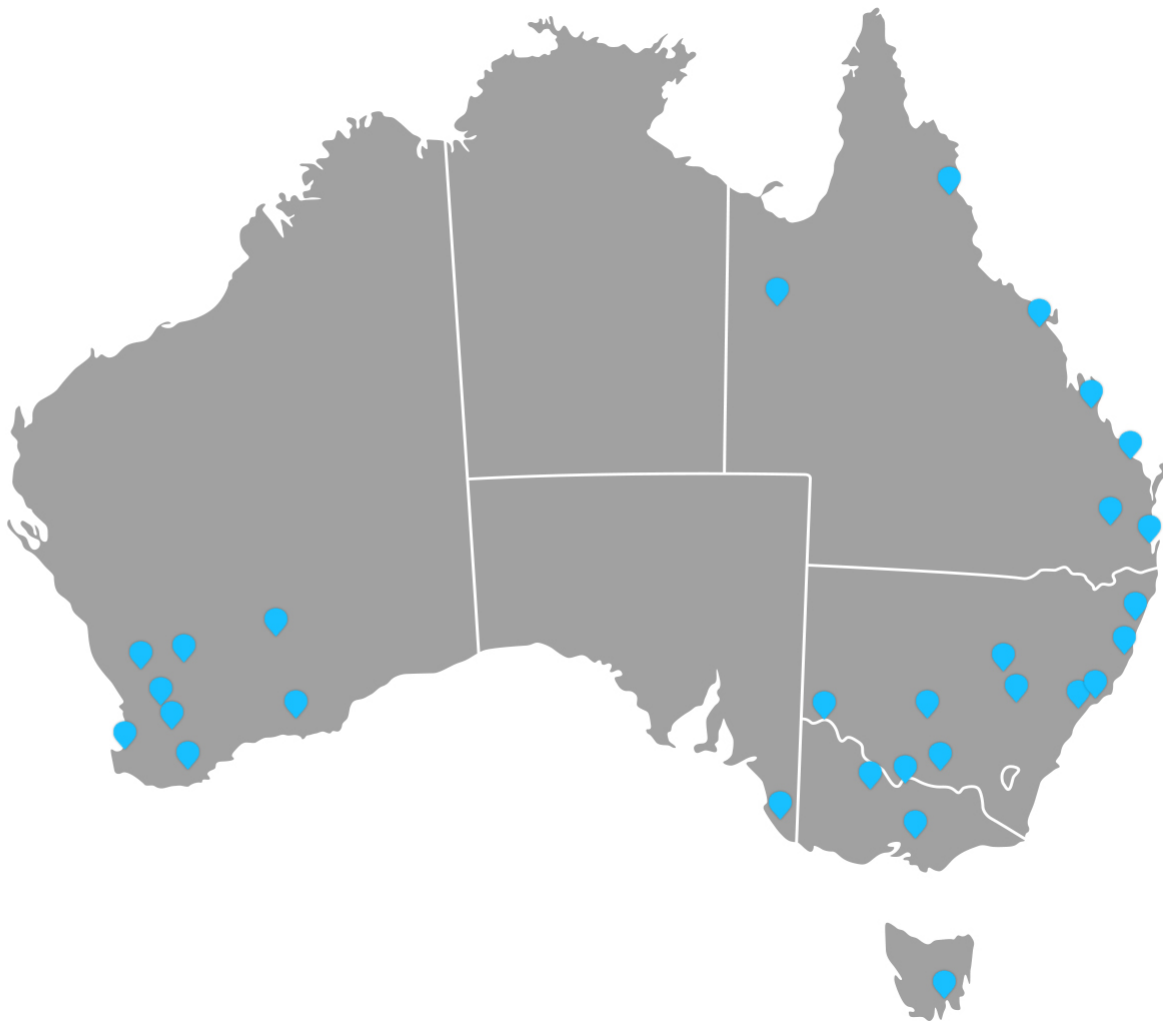
LOCAL AIRTIME
REVENUE



SOUTHERN CROSS AUSTERO

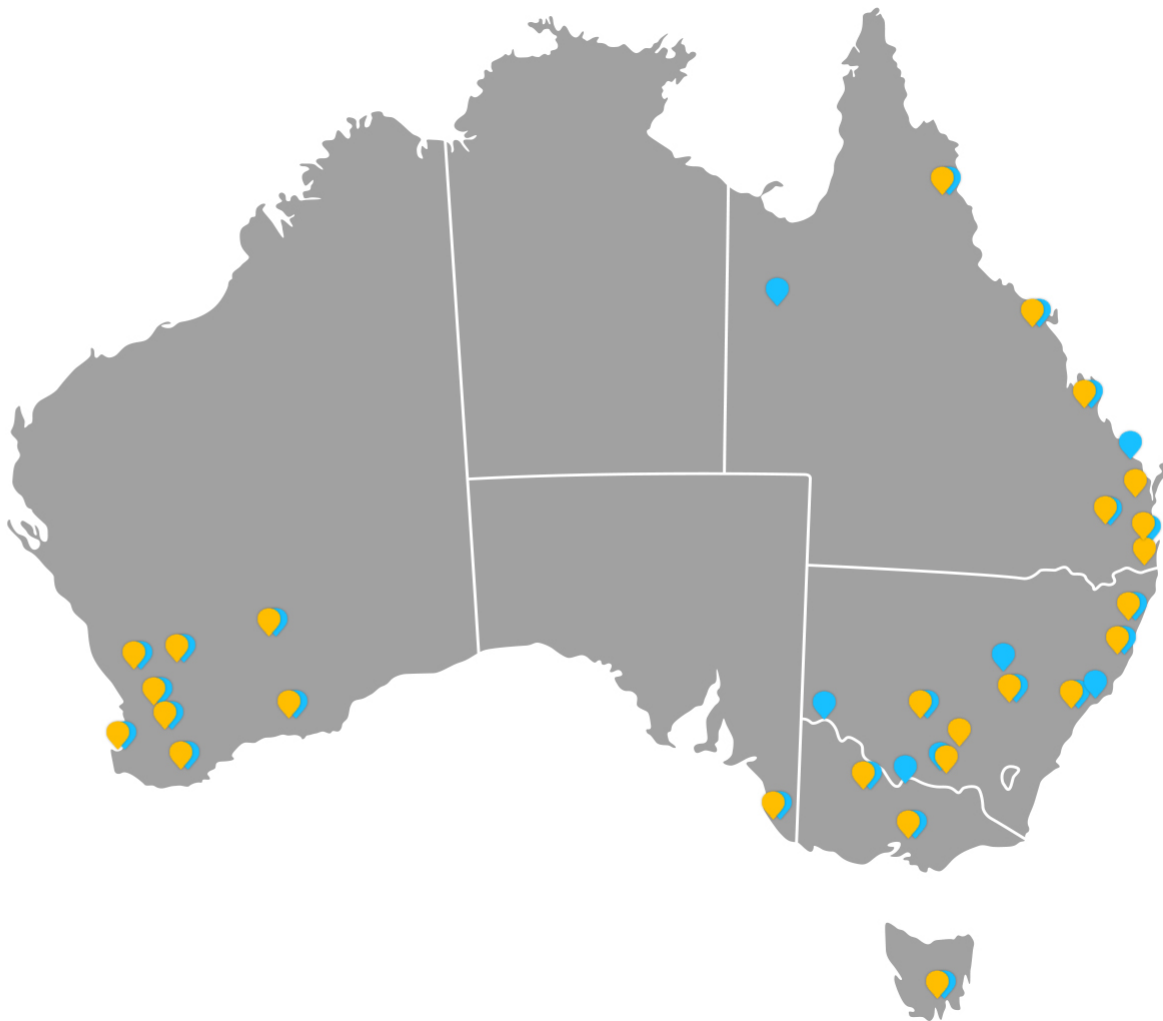
absolutely engaging







LocalWorks
everything local



in-house only



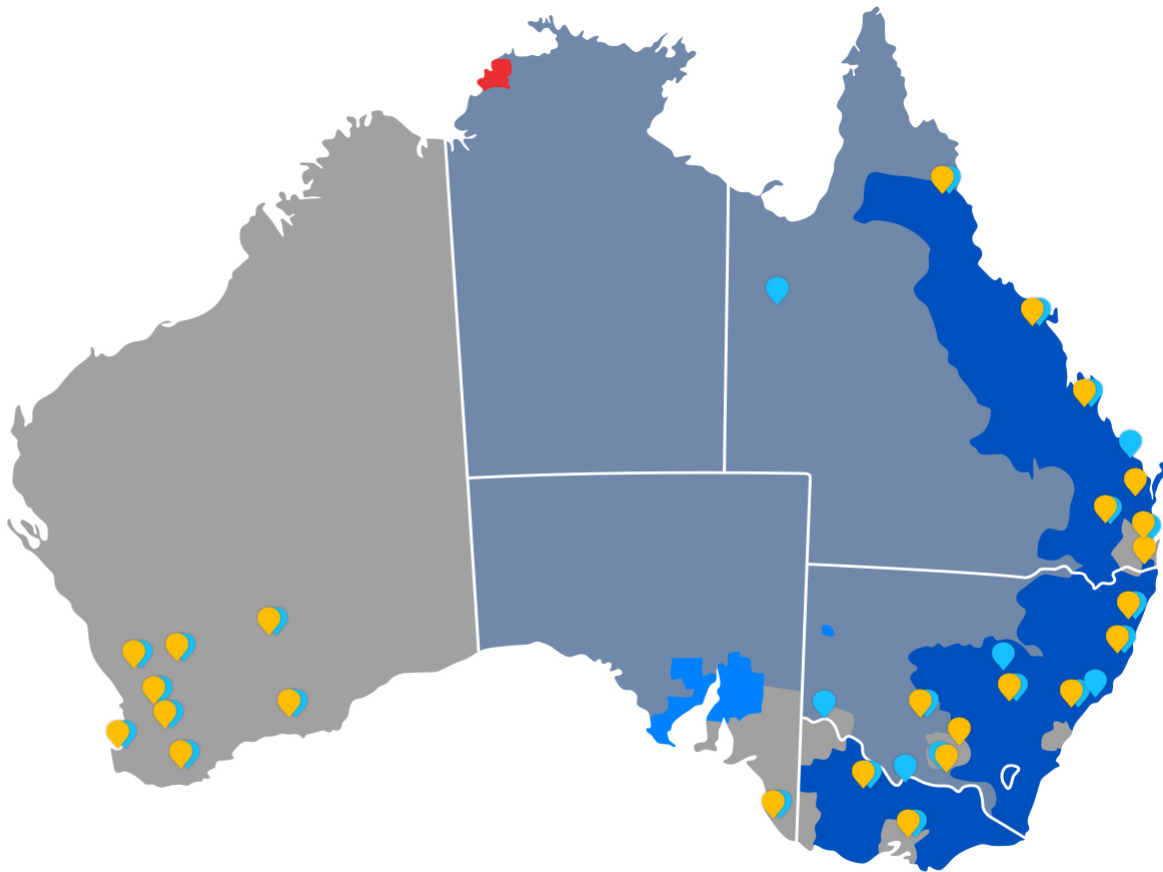
SOUTHERN CROSS AUSTEREO
absolutely engaging



LocalWorks
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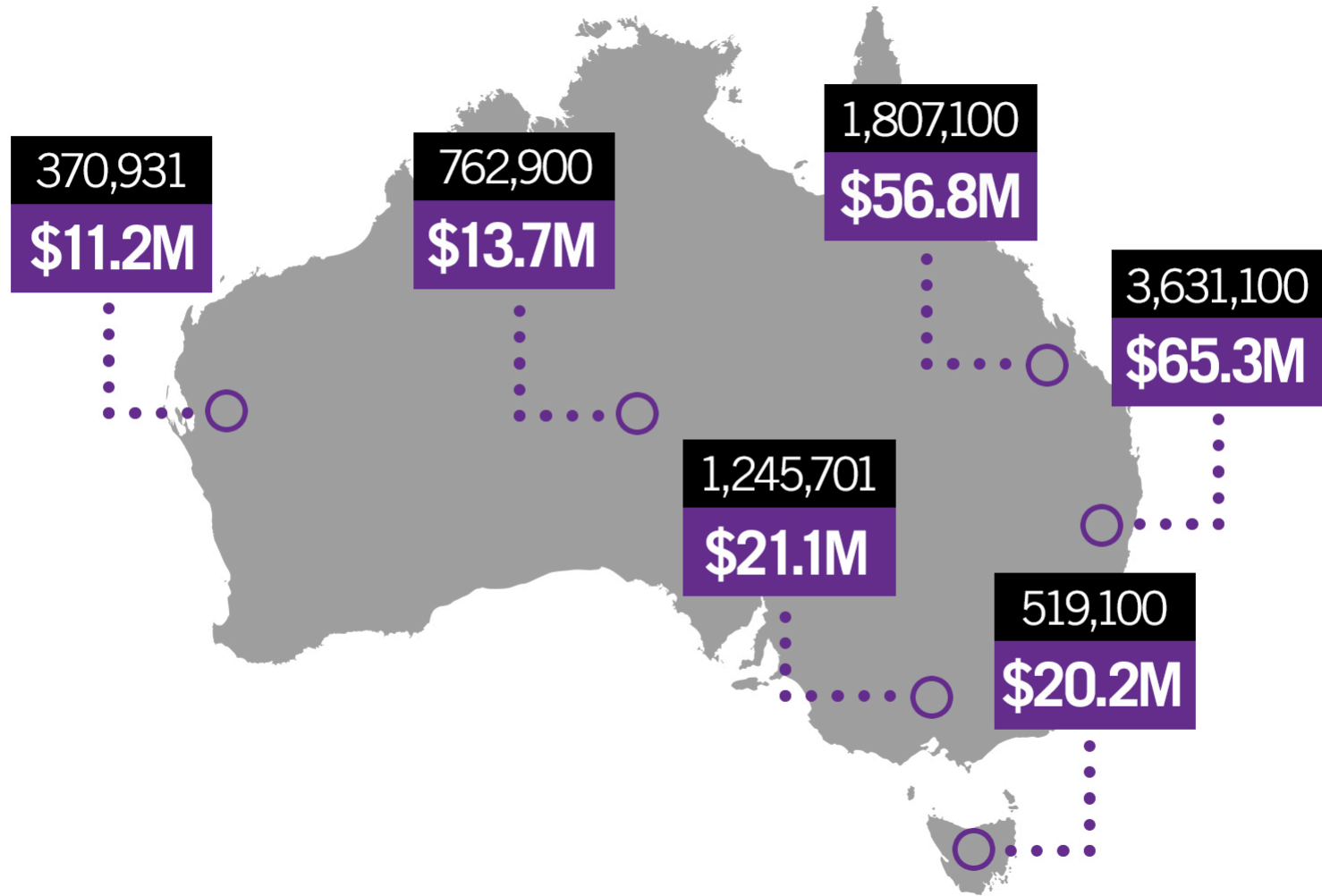


+



SOUTHERN CROSS AUSTEREO
absolutely engaging





72 RADIO
STATIONS

REACH POTENTIAL OF
5.2M

30 TV SUB
MARKETS

REACH POTENTIAL OF
6.3M

ONLINE MOBILE
SOCIAL

57 INDIVIDUAL
REGIONAL WEBSITES
16,403 AVERAGE DAILY
UNIQUE BROWSERS¹
53 FACEBOOK PAGES
35 TWITTER PAGES

303

SALES STAFF ON THE GROUND





mal use on v

13,500

ACTIVE CLIENTS USING RADIO

6,500

ACTIVE CLIENTS USING TV

26,000

ACTIVE INDIVIDUAL CLIENT ACCOUNTS





1.10
POWER
RATIO
AVERAGE





BIG BASH
Legend



26.8%

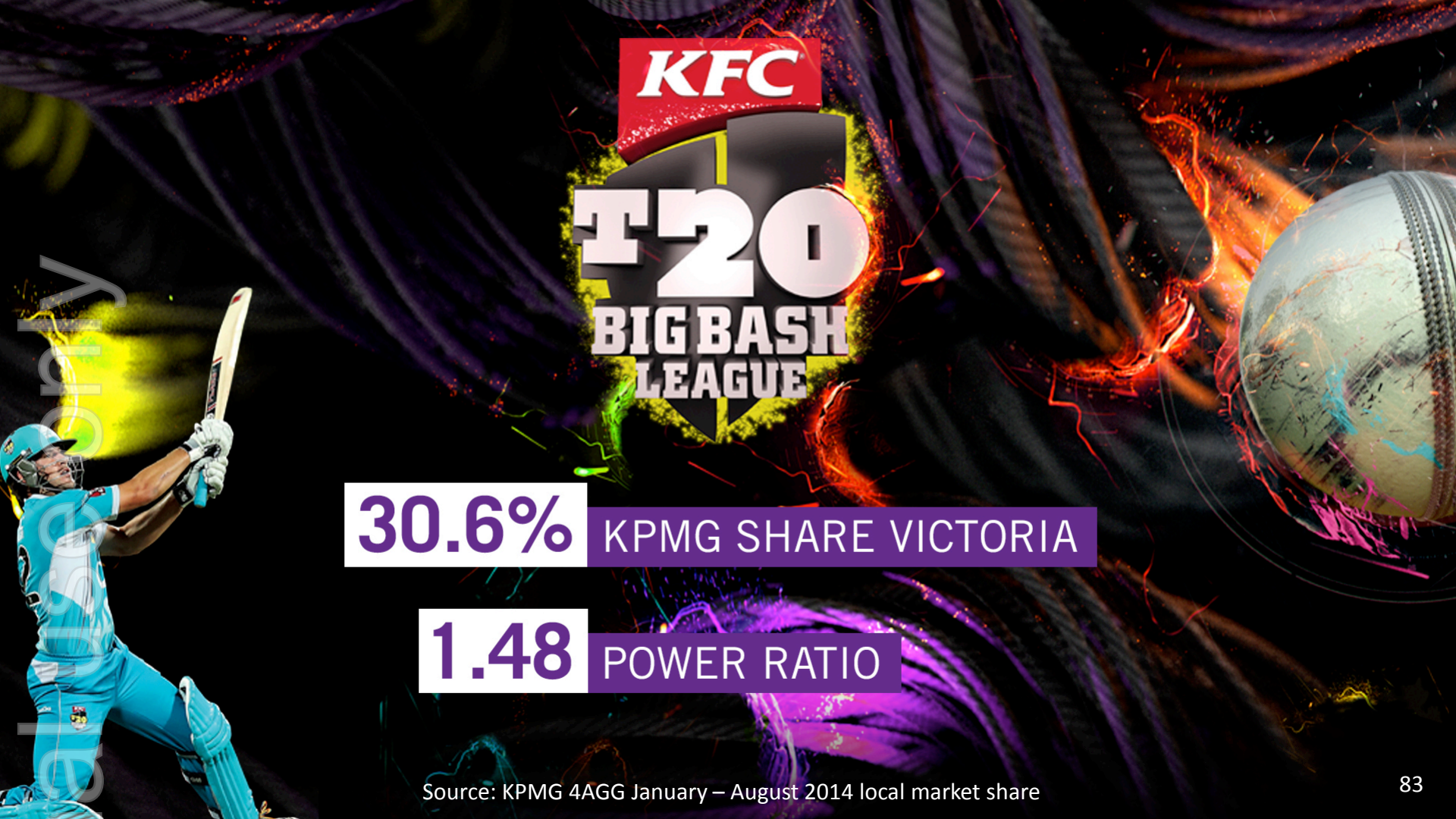
**AVERAGE
KPMG SHARE
4AGG**

1.29

POWER RATIO



Source: KPMG 4AGG January – August 2014 local market share



KFC

T20 BIG BASH LEAGUE

30.6%

KPMG SHARE VICTORIA

1.48

POWER RATIO

Source: KPMG 4AGG January – August 2014 local market share





\$5.2M

LOCAL REVENUE

430

LOCAL RADIO CLIENTS

220

LOCAL TV CLIENTS

140

MULTIMEDIA CLIENTS

THE RIVER

105.7 FM  BORDER RADIO



★ 104.9 **star**FM
THE BORDER



BRAND WORKS FIRST

3,252

TOTAL REVENUE

\$43.8M

TOTAL PACKAGES

ALBURY

125

BRANDWORKS RADIO
CLIENTS

61

BRANDWORKS TV
CLIENTS

37

BRANDWORKS
MULTIMEDIA CLIENTS

2014

\$2.5M

OVER THE PAST 7 YEARS

\$12M





REGIONAL STAFF

1,300

DIGITAL



GUY DOBSON

ENTERTAINMENT AUDIENCE STRATEGY WITH INTIMATE SCALE



DIGITAL AD SPEND SIGNIFICANT GROWTH

FY14
\$4.4B

+22%

DIGITAL DISPLAY FASTEST GROWING SEGMENT

(Excluding Paid Search / Google)

FY14: \$2.38B
+34% YOY

DRIVEN BY DIGITAL VIDEO, MOBILE AND SOCIAL

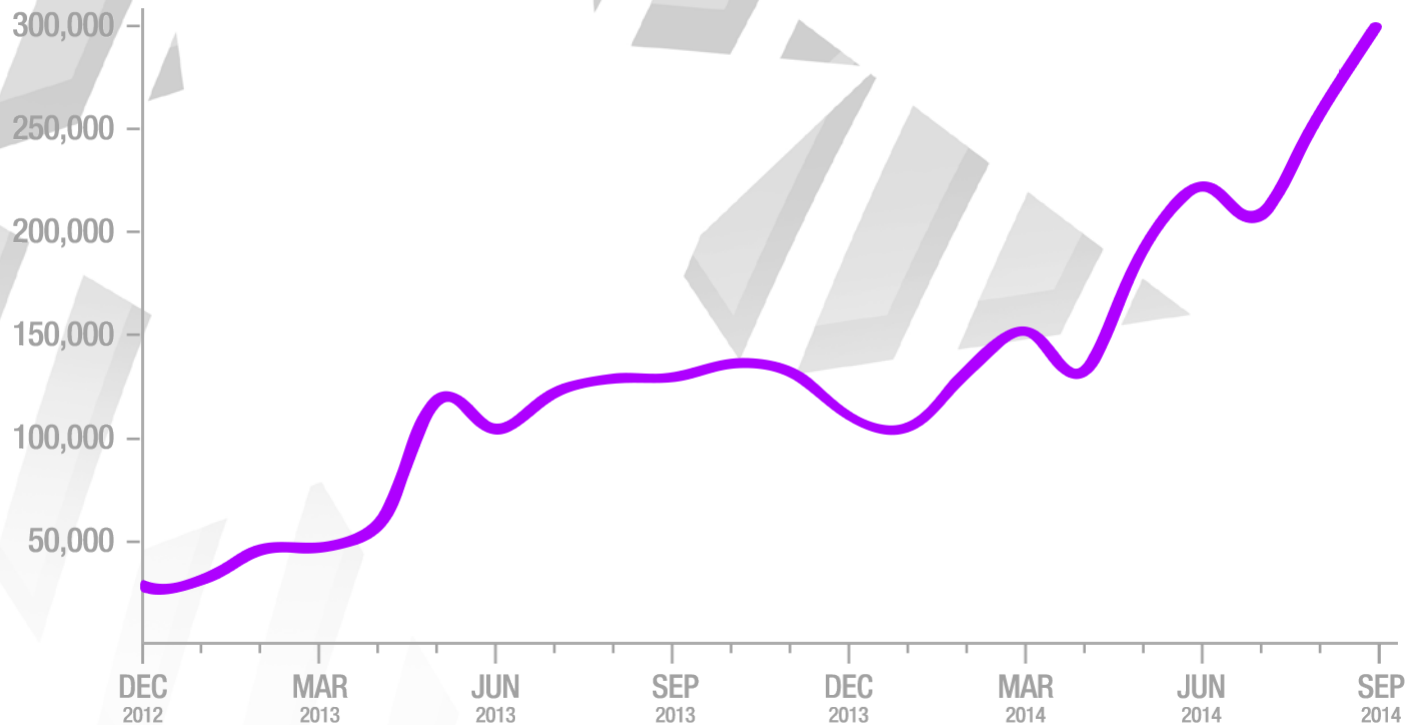
Mobile is eating the world

SOLOMOVO

Social Local Mobile Video

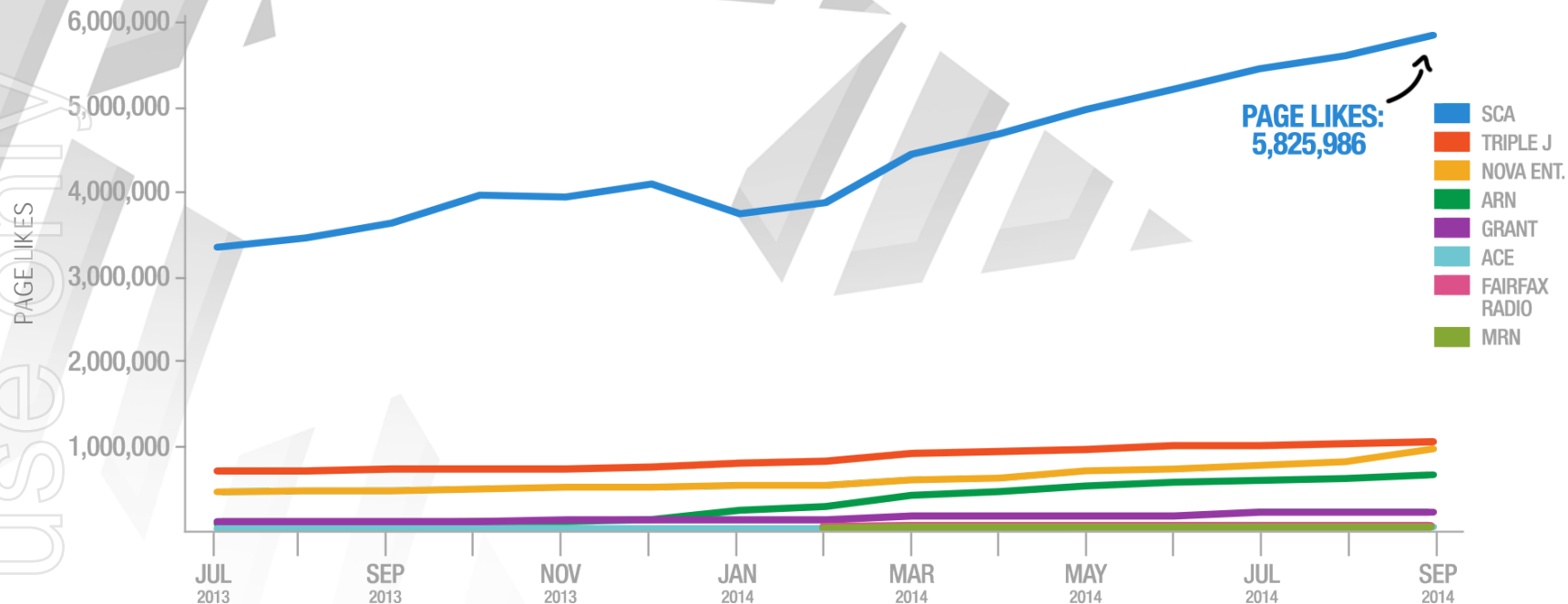
SCA TRAFFIC +909% INCREASE SINCE DEC 2012

300,000 AVERAGE DAILY UNIQUE BROWSERS



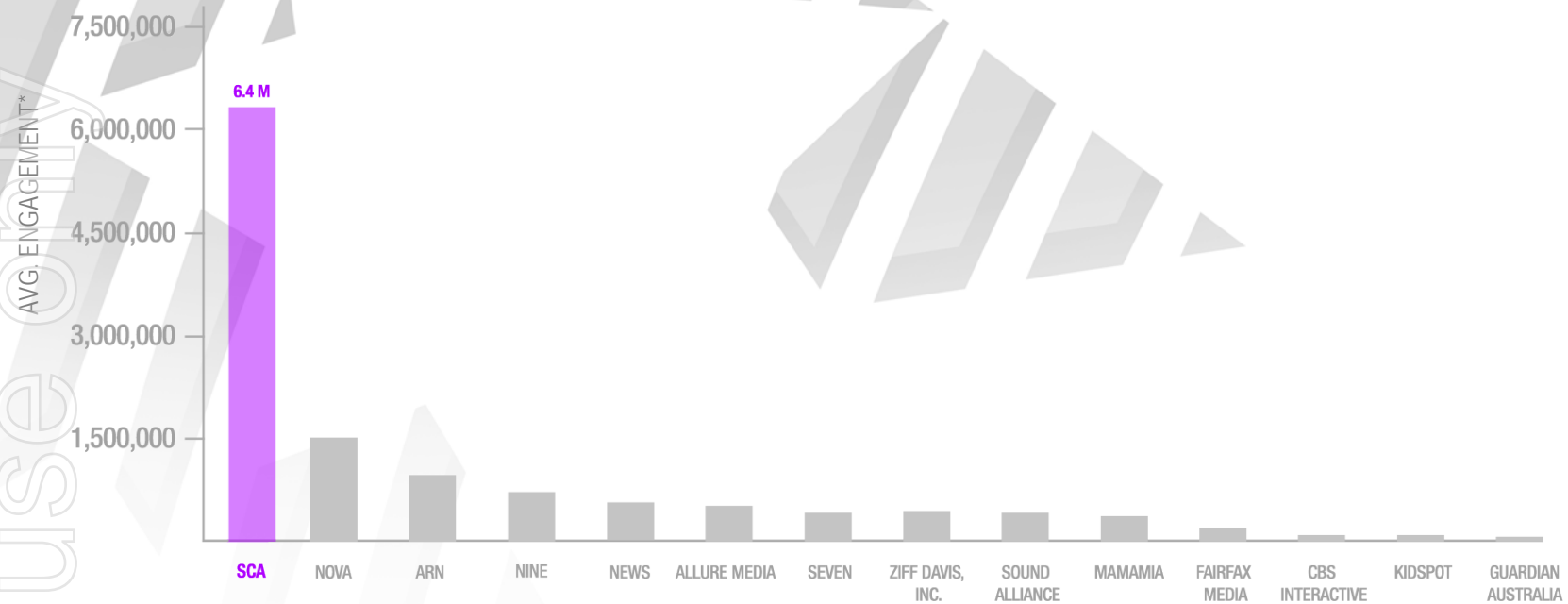
Source: Nielsen Online Ratings – Market Intelligence, Average Daily UB, 1/12/2012 to 30/09/2014

SCA SOCIAL SIX TIMES LARGER THAN NEXT RADIO GROUP



Source: Facebook, Oban Social – Jul 2013 to Sep 2014

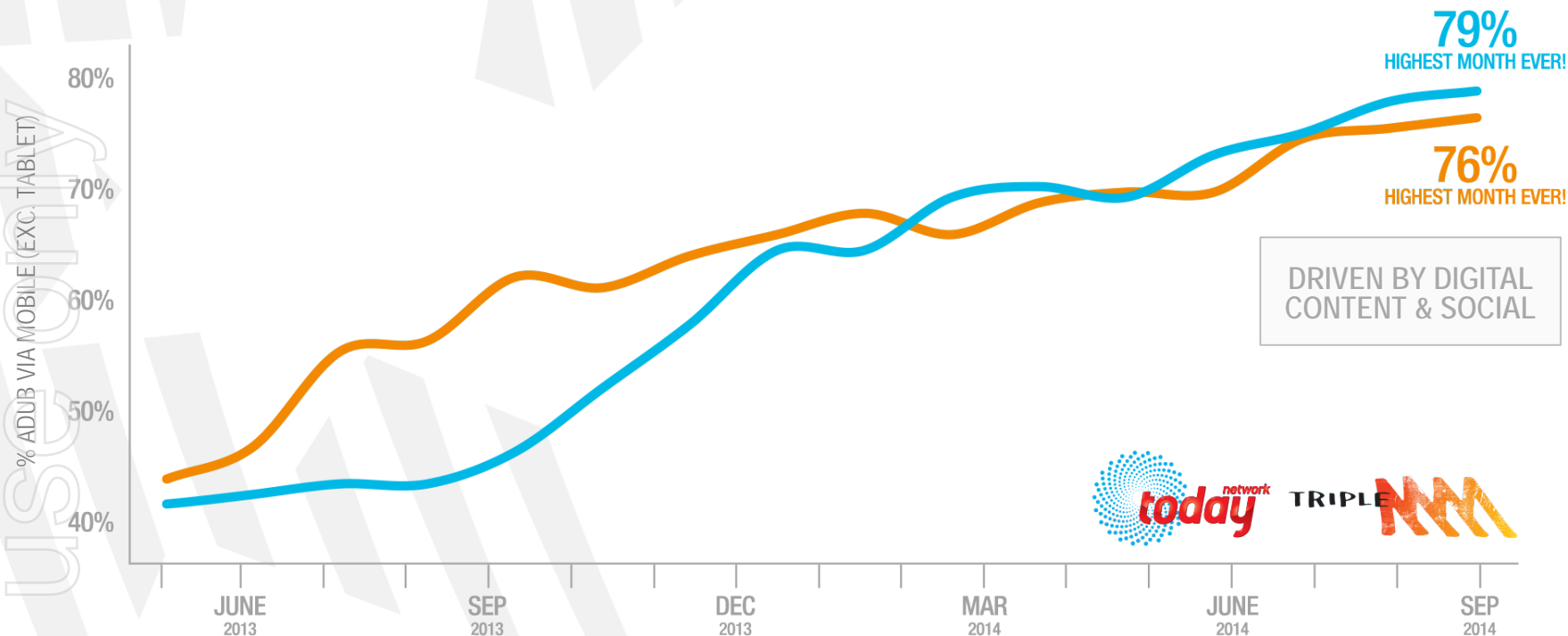
SCA ENGAGEMENT VOLUMES DWARF OTHER MEDIA



* Average Engagement: Average of Facebook's "People Talking About This" figure taken daily from 1/07/2014 to 30/09/14.

SOURCE: FACEBOOK - SCA FACEBOOK DATA - AS AT 1/10/2014

SCA LEADS THE PUBLISHER INDUSTRY WITH MOBILE FIRST PRODUCT STRATEGY



Source: Nielsen Online Ratings – Market Intelligence (Domestic) - % of Avg. Daily Unique Browsers (ADUB) via mobile (exc. Tablet) – May 2013 to September 2014

DIGITAL REVENUE GROWTH

FY14 + 19%

FY15 + 30% (SDLY)

DIGITAL PARTNERSHIPS ACCELERATING GROWTH

AD TECH + PROGRAMMATIC

VS

CONTENT + SOCIAL



DIGITAL STRATEGIC FOCUS

**SCA
BROADCAST
AUDIENCE**



**DIGITAL
CONNECTED
DEVICE**



**SCA COMMUNITY
OF PROFILED
FANS**

SCA AUDIENCE ENGAGEMENT DRIVING PROFILE DATA

SCA PROFILE

CONTENT CONSUMPTION

PURCHASE
INTENT

PAYMENT
INFORMATION

ACTIVE
LOCATION

EXACT
AGE

GENDER



DIGITAL HEADLINES

- Investment in Original Digital Content and New Digital Product is driving daily traffic growth three times faster than the AU Digital Market in H1. *
- SCA dominates Radio Peer Group and closing gap on Digital Publishers. **
- Strategic focus on Profile data will improve Commercial and Non Commercial content effectiveness across devices.

* Source – Nielsen M.I

** Source – Nielsen M.I

SALES



ANDREA INGHAM

SCA SET UP TO MEET THE NEEDS OF OUR CLIENTS

TRADING

Efficiency/etrading
Systems
Accuracy
Automation

IDEAS

Disruptive
Talent
Integration

CONTENT CREATION

Production
Content
Quality

ACTIVATION

Execution
excellence

SCA STRENGTHS

DEPTH OF
TALENT

DIGITAL

SCALE

RESEARCH

SIZE OF SALES
FORCE

CONTENT

IF

CONTENT IS
KING

THEN

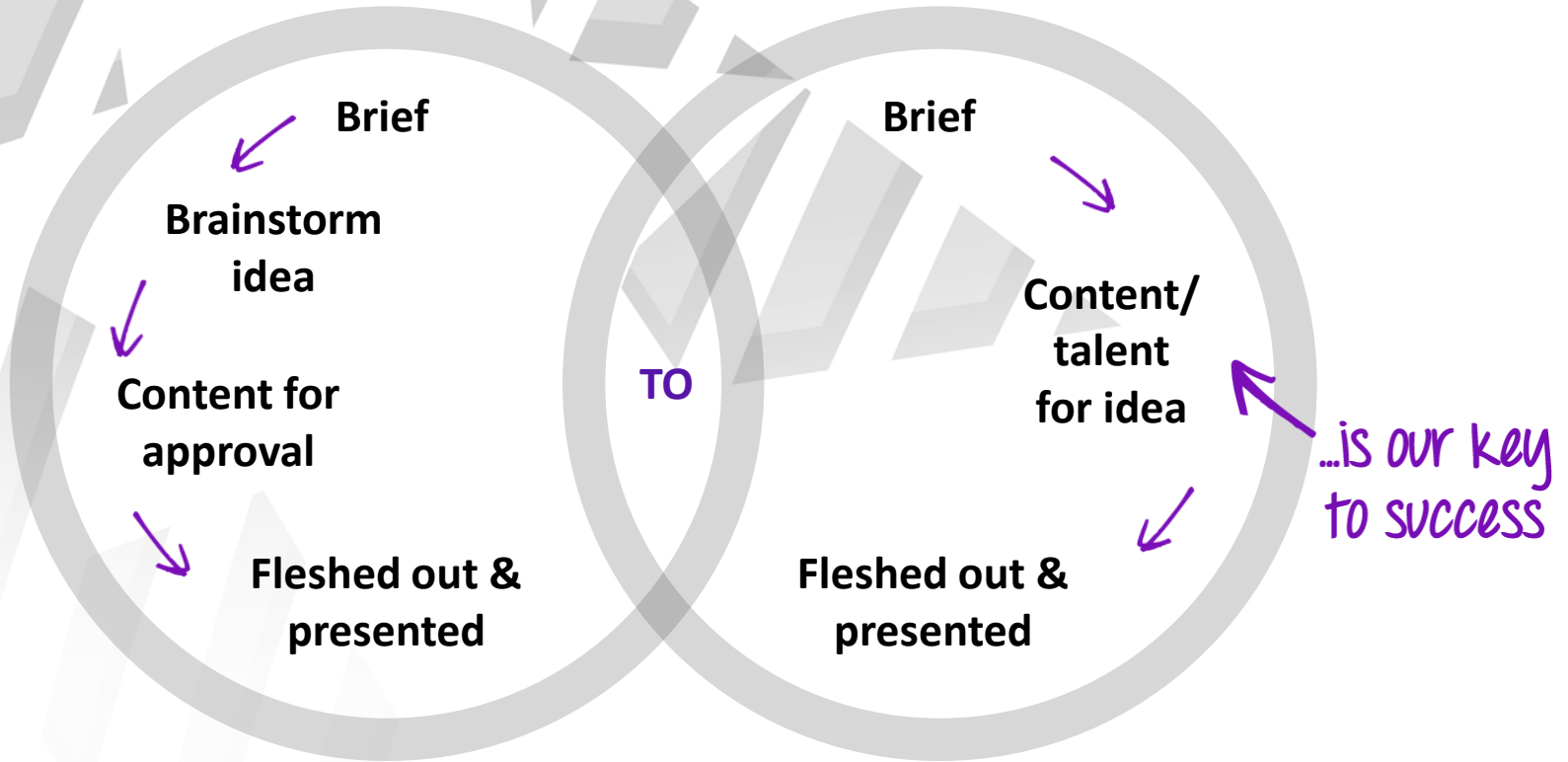
CONTEXT IS
GOD

FINE LINE BETWEEN

CUT THROUGH + INVASIVE

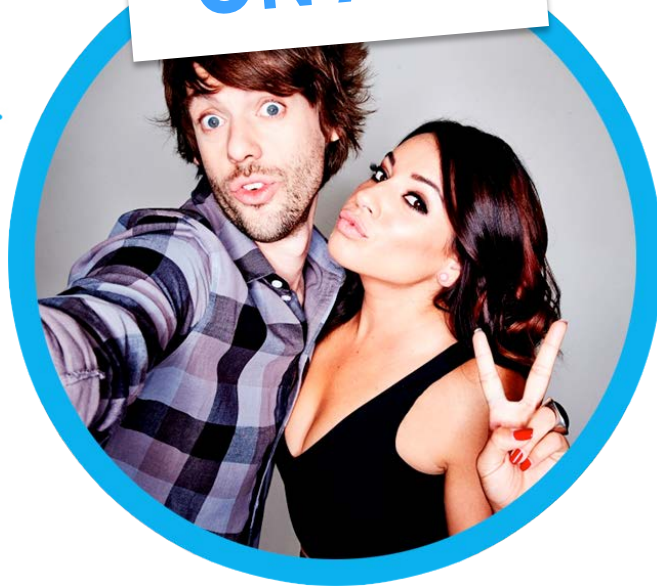
FROM

TO



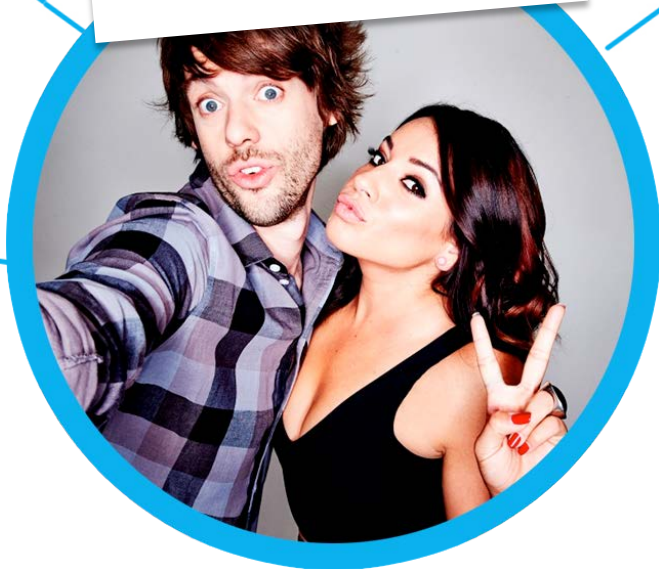


ON AIR





ONLINE



2Day FM
20 August at 12:00 · 🌐 · 📺

Check out the rogue odours hitching a ride in Pamela Vanderson, will our passengers notice?
We did some experiments with Ambi Pur Australia & New Zealand -
WATCH here: <http://bit.ly/PamVanExperiment>



44,592 people reached

Like · Comment · Share · 🍷 37 🗨 3 🔄 2

Boost Post



Don't give odours a ride.


Ambi Pur Road Trip

At any moment, your car could be hijacked by bad smells.
But, with Ambi Pur Car air freshener on board, those rogue smells don't stand a chance.

So Dan & Max are putting that to the test by letting you use their car, as we drive it around every capital city in Australia odour free!

Whether going to the shops, moving house, picking up your sports team or taking someone to the airport, don't give odours a ride!

breathe happy



2day

Need a free ride this weekend?
Book a ride Today!

On Air
Ellie Angel
9:01 AM - 3:00 PM

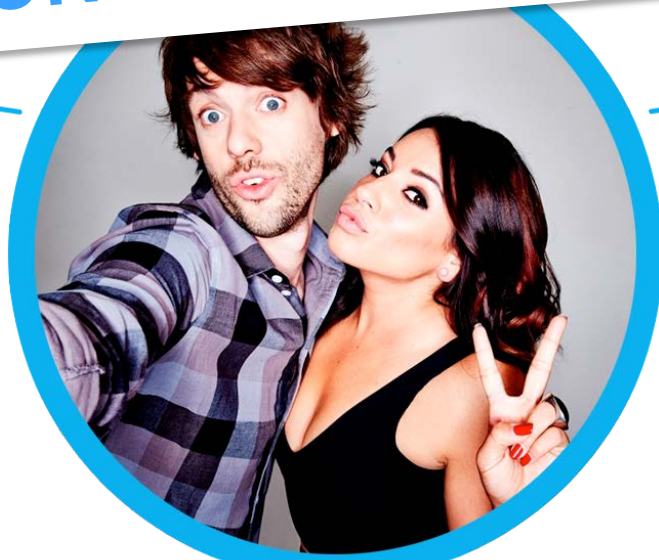
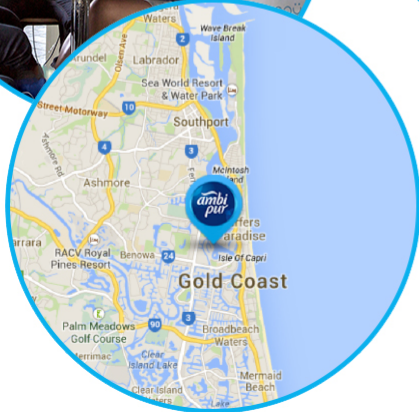
Now Playing:
Sydney's Hit Music Station

Just Played:
Break Free
Ariana Grande
Like A Drum
Guy Sebastian
Amnesia
5 Seconds Of Summer
Hello
Martin Solveig
Ghost
Elta Henderson





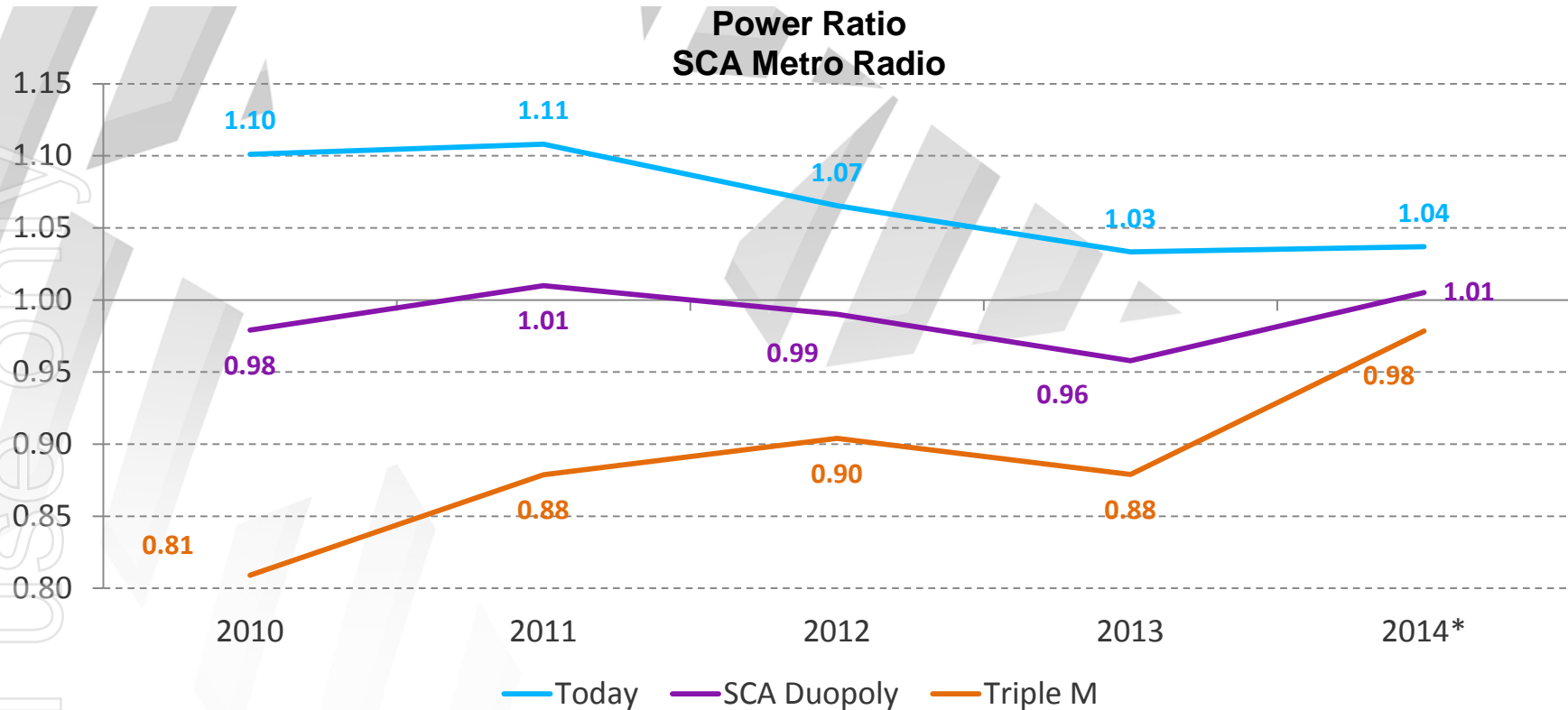
ON THE GROUND





- GroupM Annual event – invite only
- 400 executives responsible for \$3.0B in ad spend
- Partners – SCA, Pandora, Shazam, Newscorp, Val Morgan

METRO RADIO AUDIENCE & POWER RATIO (18-54)



SOURCE: Nielsen Audience, 0600-2400, Total People, KPMG Industry Revenue, *2014 audience Jan-Aug, Revenue Share Jan-Jun for Metro TEN

REVENUE BUILDING PROJECTS

- Improved systems – e trading
- Deeper use of talent and integration for clients
- Data - Tracking of audiences across media
- Further leverage of assets

Q & A



RHYS HOLLERAN

original use only

SOUTHERN CROSS AUSTEREO

THANK YOU



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