Overview - SCA Australia Assets

**Capital Cities**
- 18 Metro Radio Stations
  - 10 FM stations &
  - 8 Digital Radio Stations

**Regional Cities**
- 68 Regional Radio Stations
- TV affiliation in regional Australia & 105 signals

**National Exposure**
- 94 Websites + Apps,
- Digital Agency
Australian DAB+ Market
SCA’s Brand Strategy

Safe – Trusted – Family of Brands
Strategic Opportunity Incremental Reach

Aggregated FM and Digital Radio increases unduplicated audience reach

SCA LISTENERSHIP

- **4,453,000** listens to SCA’s FM Network only
- **295,000** listen to both SCA’s FM and Digital Radio
- **397,000** listen to SCA’s Digital Radio Network only

National Network Cume Reach (000’s)
Mon-Fri
Breakfast 05:30 – 9:00am P10+

<table>
<thead>
<tr>
<th>Year</th>
<th>SCA DAB+</th>
<th>SCA FM</th>
<th>ARN</th>
<th>Nova FM</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>2,507</td>
<td>2,452</td>
<td>2,524</td>
<td>2,535</td>
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<tr>
<td>2016</td>
<td>2,524</td>
<td>2,544</td>
<td>2,562</td>
<td>2,698</td>
</tr>
<tr>
<td>2017</td>
<td>2,544</td>
<td>2,573</td>
<td>2,689</td>
<td>2,734</td>
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<tr>
<td>2018</td>
<td>2,573</td>
<td>2,575</td>
<td>2,698</td>
<td>2,795</td>
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</table>
SCA’s Monetisation Strategy

<table>
<thead>
<tr>
<th>BRANDS</th>
<th>LISTENING</th>
<th>MONETISATION</th>
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<tbody>
<tr>
<td>GREATEST HITS</td>
<td>9% audience</td>
<td>109% @ $100cpm</td>
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<tr>
<td>CLASSIC ROCK</td>
<td></td>
<td></td>
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<tr>
<td>MODERN</td>
<td></td>
<td></td>
</tr>
<tr>
<td>COUNTRY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TRIPLE M</td>
<td>91% audience</td>
<td></td>
</tr>
<tr>
<td>TRIPLE M</td>
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</tr>
</tbody>
</table>

TOTAL PREMIUM CPM
Nurturing New Talent

- SCA launched Hubble late 2017 – an industry first talent development initiative
- Hubble platform discovers, assesses, trials and develops new talent
- DAB+ stations provide a stepping stone to FM Stations

Luke & Lewis
Triple M Modern Digital
Our first Hubble on-air talent, 2017
Digital Streaming Eco-System

SCA Websites
Desktop, Mobile & Tablet

SCA Apps
Mobile & In Car

3rd Party
Apps & Websites

OFFICIAL

UNOFFICIAL
Smart Speaker Growth

How many smart speakers do you own?

<table>
<thead>
<tr>
<th></th>
<th>Dec 2017</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>62%</td>
<td>2</td>
<td>21%</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>3 or more</td>
<td>17%</td>
</tr>
<tr>
<td>3 or more</td>
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</table>

Dec 2018

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>2</th>
<th>30%</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>48%</td>
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<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>3 or more</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

Smart speaker adoption more than doubled in 2018 in the US, and is following a similar growth trajectory in Australia.
Smart Speaker Integrations

- Live Radio
  106 Streams

- On Demand
  200 Podcasts

- Smart News
  896 mins per week
The Golden Age of Audio

- Audio – Radio needs to invest in its future
- DAB+ is a growth platform and accelerator for the industry
- Consumers expect premium content across multiple platforms on any device
- Advertisers desire ‘Scale and Simplicity’
- Media owners require ‘Return on Investment’
- Audio operators must remain ‘Live and Local’
- Industry must work together to optimize the scale and value of its combined influence