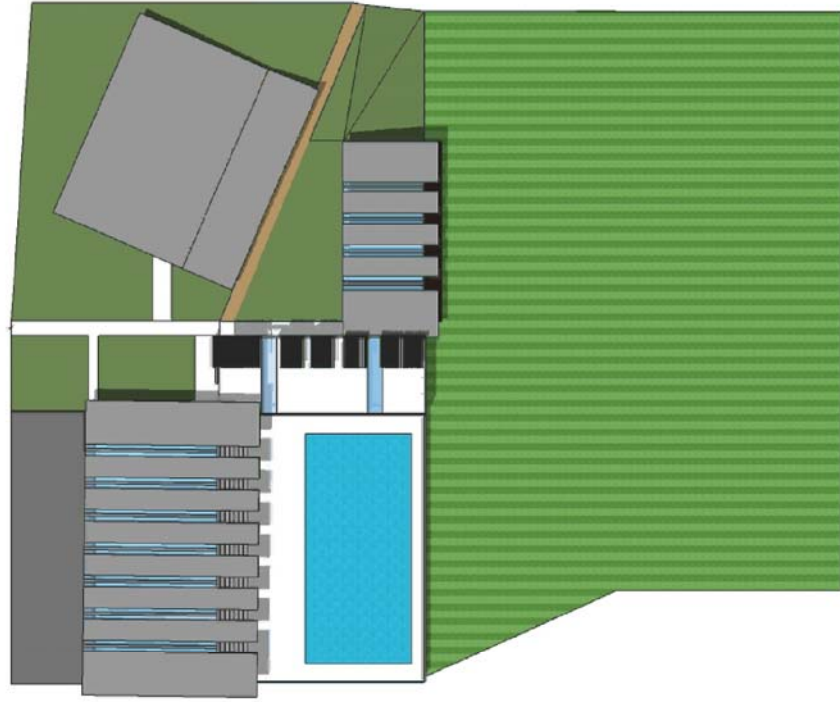


3 D A n i m a t i o

n

Conceptual Buildings



C o n t a c t D e t a i l s

Central Coast Regional Development Corporation

16 The Avenue,

Mt Penang Parklands

Kariong NSW 2250

P 43 40 1002

ADG Architects

Suite 18

Mt Penang Parklands

Kariong NSW 2250

P 43 40 2088

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Site accessed 16/12/2010



**Land & Property
Management Authority**

Central Coast Regional Development Corporation

P r e s e n t a t i o n
b y
A D G A r c h i t e c t s

adg
architects

Repucom
Sponsor Exposure Analysis
Central Coast Mariners
2010/11 End of Season Report



REPUCOM
international



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1.0 Executive Summary

The Central Coast Mariners were Grand Finalists of the 2010/11 Hyundai A-League season. Repucom was commissioned by the Central Coast Mariners Football Club to track and analyse the media exposure value generated by several major sponsors during the 2010/11 Hyundai A-League competition. This report focuses on the level of media exposure delivered via live Fox Sports, peripheral news and print media coverage. The following comments and recommendations stem from the 2010/11 analysis:

Positive on-field performances were a major factor behind the significant growth in RBA value across all media types. This was highlighted by Fox Sports television audiences being up by 30% year on year and print media exposure up 148% year on year. However, the reduced number of Central Coast Business boards resulted in a considerable loss in dedicated value and time.

2010/11 Season Overview

- Central Coast Mariners partners recorded a total RBA+ media exposure value of **\$773,535** during the 2010/11 Hyundai A-League Season.
- Major partner Central Coast recorded the largest year on year growth, mainly driven by the significant increase in print media exposure (up **142%**).
- Central Coast held the largest share of voice (55%) amongst all Mariners partners, followed by Primo Smallgoods (22%) and Energy Australia (15%).
- Jersey front branding provided the greatest platform of exposure for Central Coast, delivering a total dedicated value of **\$152,086** (up 34% year on year).
- Live Fox Sports dedicated television coverage provided the majority of value for all sponsors (56%), followed by print media (30%) and peripheral news (14%).
- Central Coast Mariners recorded a cumulative Fox Sports television viewership of **1.609m** (up 30% year on year).
- The increase in audience numbers was due to the Mariners progression through the Final Series and expansion of the competition in 2010/11 resulting in an additional seven fixtures. However the average television audience increased by 3% in comparison to the 2009/10 season.



Year on Year Comments

Central Coast Business

- Central Coast Business generated a total RBA+ exposure value of **\$427,085** (up 37% year-on-year).
- The increase in print media exposure (up 142% year-on-year) was the major factor behind the positive year on year growth in value for Central Coast.
- The increase in print media value was driven by:
 - Daily Telegraph – 24 appearances (up by 16 from 2009/10)
 - Sunday Telegraph – 13 appearances (up by 11 from 2009/10)
- Central Coast jersey front branding generated a total media value of **\$152,086** (up 34% year on year) from 5,949 seconds of exposure time (up 5% year on year).

Repucom's analysis found that Central Coast Business boards in each upper corner were replaced by other partners during 2010/11 Hyundai A-League Season. Masterfoods was the new sponsor in the upper left corner (see below) and Mariners Centre of Excellence was the new sponsor in the up per right corner (see below).





Energy Australia

- Energy Australia generated a total RBA+ media value of **\$113,642** (up 10% year-on-year)
- Board signage was the most valuable inventory item delivering a total dedicated value of **\$101,606** (up 16% year-on-year), from 15,065 seconds of exposure time (up 14% year-on-year). Whilst, the average on screen time per match decreased from 490 seconds in 2009/10 to 443 seconds in 2010/11, the three additional regular season home fixtures saw the RBA value increase by **\$14,299**.
- The positive on-field performances coincided with an increase in player and coach interviews along with greater match highlights, delivering an increase in time for the following inventory items:
 - Media backdrop – up 41 seconds
 - Board signage – up 39 seconds

Branding Comments

The Central Coast Holiday Parks brand was rarely visible during long distance shots due to the light text on a light background. Repucom highlights the use of light on dark branding creative performs extremely well, for example Hyundai text (see snapshot below).





1.1 Project Outline

Tracking Period	1 st July 2010 – 31 st March 2011
Sport/Event/Competition	2010/11 Hyundai A-League Regular Season 2010/11 Hyundai A-League Final Series
Markets	Australia
Brands	Central Coast Business Primo Smallgoods Energy Australia Wyong Shire Council Central Coast Holiday Parks
Dedicated Television Broadcast	Live Fox Sports Broadcast
Television Peripheral Exposure	Metropolitan nightly news and sports interest programs
Print Media Exposure	Major metropolitan and selected regional publications
Repucom Methodology	RBA+
Other Comments	-

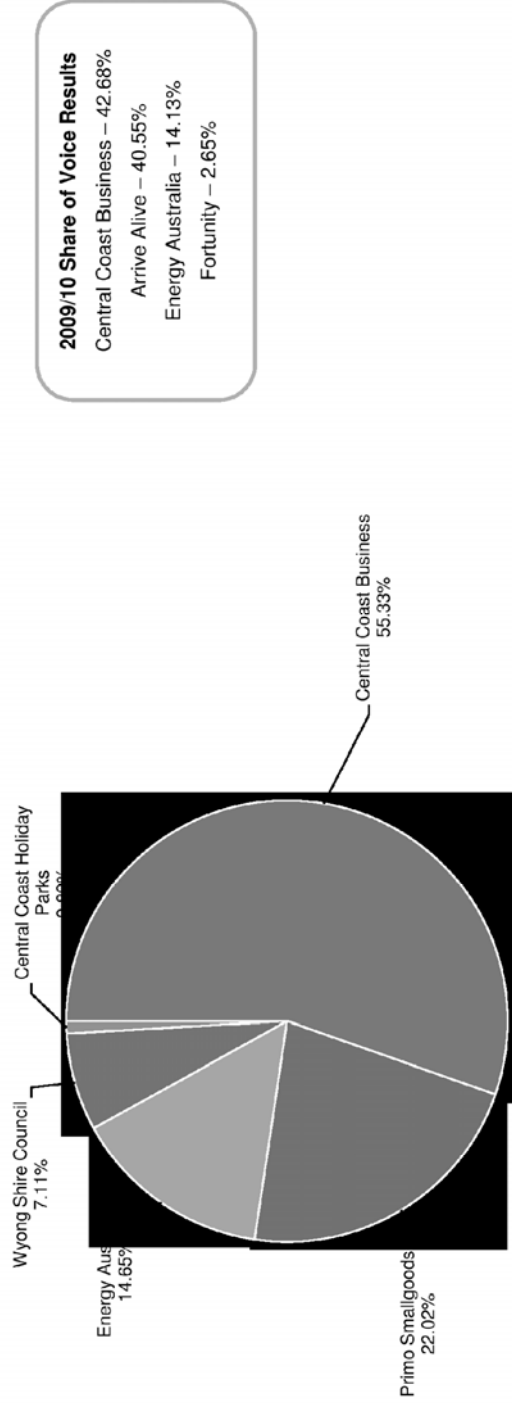


1.2 Central Coast Mariners Total Media Exposure Value

The total exposure value of each Central Coast Mariners sponsor was:

Sponsor	Dedicated Television	Peripheral Television	Print Media	TOTAL
Central Coast Business	\$206,710	\$58,361	\$162,015	\$427,085
Primo Smallgoods	\$95,690	\$32,607	\$41,992	\$170,290
Energy Australia	\$101,606	\$12,035	-	\$113,642
Wyong Shire Council	\$26,236	\$1,364	\$27,544	\$55,143
Central Coast Holiday Parks	\$5,344	\$129	\$1,413	\$6,887
TOTAL	\$436,074	\$104,497	\$232,964	\$773,535

Chart: Central Coast Mariners – Share of Voice



2009/10 Share of Voice Results
 Central Coast Business – 42.68%
 Arrive Alive – 40.55%
 Energy Australia – 14.13%
 Fortunity – 2.65%



1.3 Central Coast Mariners Audience and Attendance Research (OzTam & AGB Neilson Media Group)

Round	Home Team	Away Team	Stadium	Attendance	Fox Sports Audience
1	Melbourne Heart	Central Coast Mariners	AAMI Park	11,050	72,189
2	Central Coast Mariners	Adelaide United	Bluetongue Stadium	8,447	25,337
3	Wellington Phoenix	Central Coast Mariners	Westpac Stadium	9,500	9,270
4	Sydney FC	Central Coast Mariners	Sydney Football Stadium	10,147	51,827
5	Central Coast Mariners	Melbourne Victory	Bluetongue Stadium	6,829	32,451
6	Central Coast Mariners	Melbourne Heart	Bluetongue Stadium	6,326	29,031
7	Gold Coast United	Central Coast Mariners	Skilled Park	2,037	23,719
9	Central Coast Mariners	North Queensland Fury	Bluetongue Stadium	6,656	35,711
10	Brisbane Roar	Central Coast Mariners	Suncorp Stadium	5,051	38,589
12	Central Coast Mariners	Perth Glory	Sydney Football Stadium	10,746	35,903
13	North Queensland Fury	Central Coast Mariners	Dairy Farmers Stadium	3,625	58,046
14	Wellington Phoenix	Central Coast Mariners	Westpac Stadium	3,625	43,770
14	Melbourne Victory	Central Coast Mariners	AAMI Park	9,674	54,152
15	Central Coast Mariners	Gold Coast United	Bluetongue Stadium	9,732	39,025
15	Central Coast Mariners	Brisbane Roar	Bluetongue Stadium	6,836	34,448
16	Newcastle Jets	Central Coast Mariners	Energy Australia Stadium	7,731	25,027
17	Central Coast Mariners	Sydney FC	Bluetongue Stadium	7,160	61,567
18	Perth Glory	Central Coast Mariners	NIB Stadium	6,536	50,971
19	Central Coast Mariners	North Queensland Fury	Bluetongue Stadium	5,979	35,660
20	Central Coast Mariners	Adelaide United	Bluetongue Stadium	6,249	30,777
21	Central Coast Mariners	Melbourne Victory	Bluetongue Stadium	12,409	41,485
22	Central Coast Mariners	Wellington Phoenix	Bluetongue Stadium	6,844	49,275



Central Coast Mariners Audience and Attendance Research Continued

Round	Home Team	Away Team	Stadium	Attendance	Fox Sports Audience
22	Central Coast Mariners	Brisbane Roar	Bluetongue Stadium	7,312	38,364
23	Newcastle Jets	Central Coast Mariners	Energy Australia Stadium	13,467	30,364
23	Perth Glory	Central Coast Mariners	NIB Stadium	6,828	33,877
24	Central Coast Mariners	Sydney FC	Bluetongue Stadium	10,546	34,867
25	Adelaide United	Central Coast Mariners	Hindmarsh Stadium	12,109	40,113
26	Melbourne Heart	Central Coast Mariners	AAMI Park	3,667	59,179
26	Gold Coast United	Central Coast Mariners	Skilled Park	10,024	13,279
27	Central Coast Mariners	Newcastle Jets	Bluetongue Stadium	9,975	23,387
F1	Central Coast Mariners	Brisbane Roar	Bluetongue Stadium	10,166	63,156
F2	Brisbane Roar	Central Coast Mariners	Suncorp Stadium	25,168	87,044
PF	Central Coast Mariners	Gold Coast United	Bluetongue Stadium	7,539	75,703
GF	Brisbane Roar	Central Coast Mariners	Suncorp Stadium	50,168	231,787
TOTAL				319,412	1,609,350

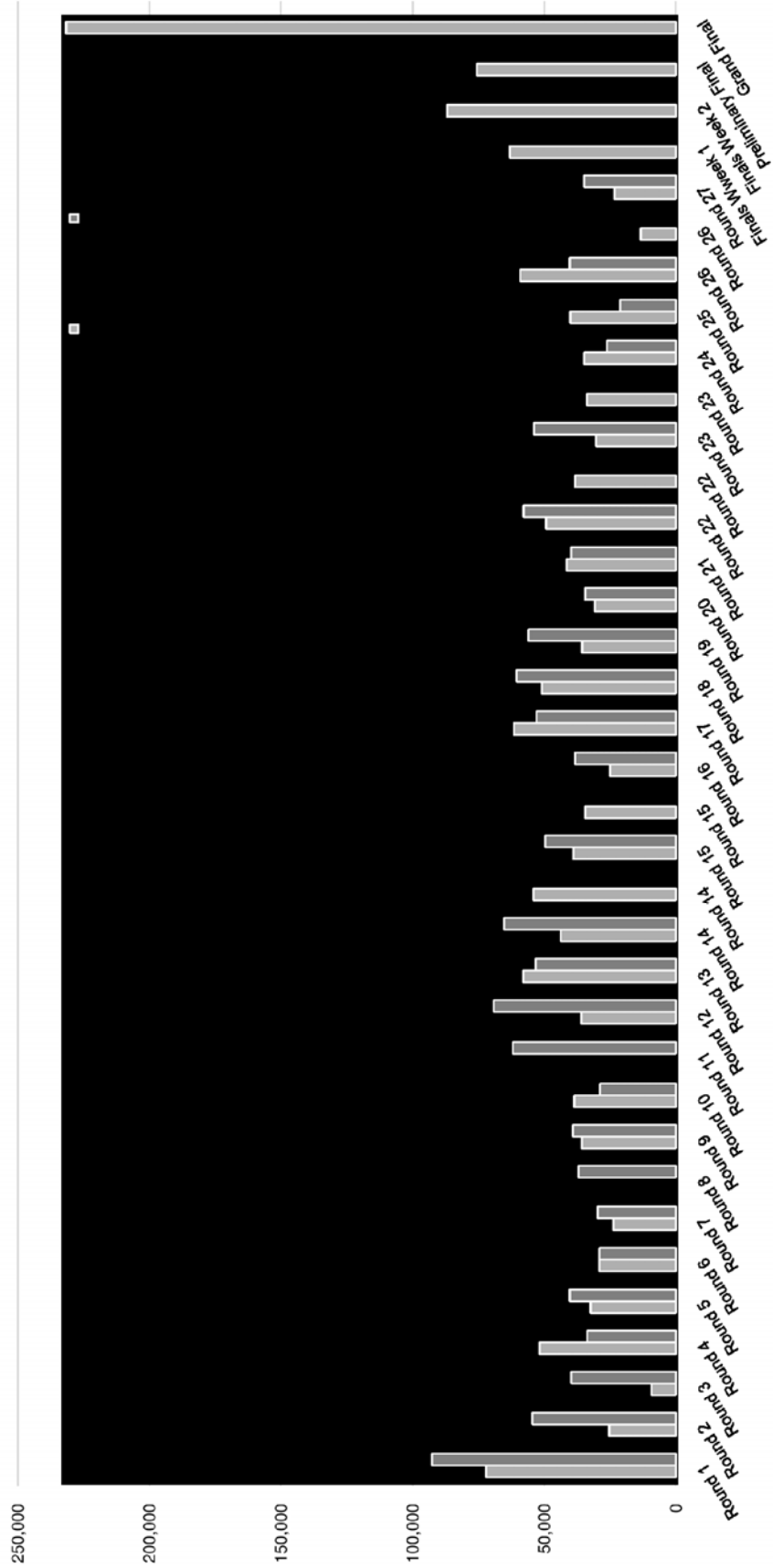


Chart: Central Coast Mariners Television Audience – Year on Year Comparison

Average Television Viewership

2010/11 - 47,334 (Up 3%)

2009/10 - 45,968





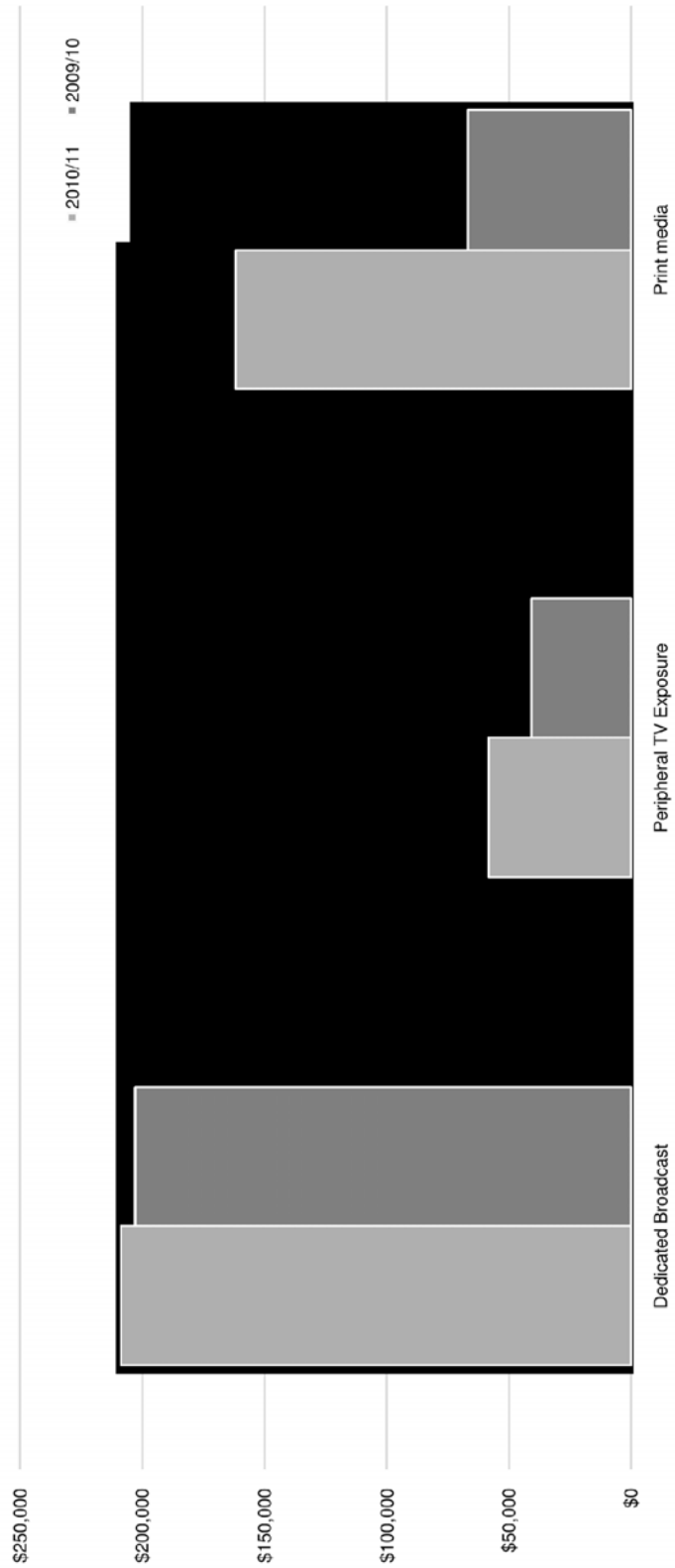
2.0 Sponsor Exposure Analysis

2.1 Central Coast Business Total Exposure Value

The total exposure value generated by Central Coast Business, compared to 2009/10 was:

Year	Dedicated Television	Peripheral Television	Print	TOTAL
2010/11	\$206,710	\$58,361	\$162,015	\$427,085
2009/10	\$202,944	\$40,901	\$66,950	\$310,794

Chart: Central Coast Business Total Exposure Value





2.1.1 Central Coast Business– Dedicated Television Coverage

The following table highlights dedicated television exposure by inventory:

Inventory	Exposures	Duration	100% Media Equivalency	RBA+ Media Value	RBA+ %
Jersey Front	3,145	5,949	\$383,982	\$152,086	39.61
Board Signage	1,615	5,998	\$258,829	\$47,969	18.53
Non Playing Apparel	59	96	\$13,137	\$5,078	38.69
Spectator Apparel	37	78	\$4,255	\$1,522	35.78
Mascot Apparel	2	2	\$121	\$55	45.06
TOTAL	4,858	12,123	\$660,325	\$206,710	



Chart: Dedicated Exposure Value by Inventory - YOY

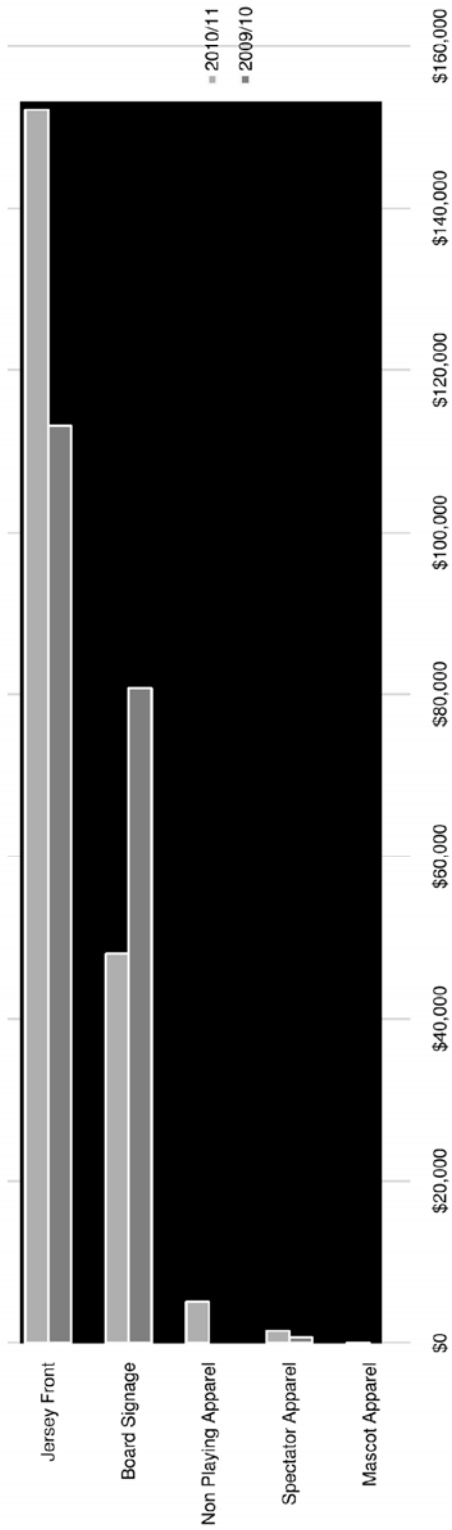
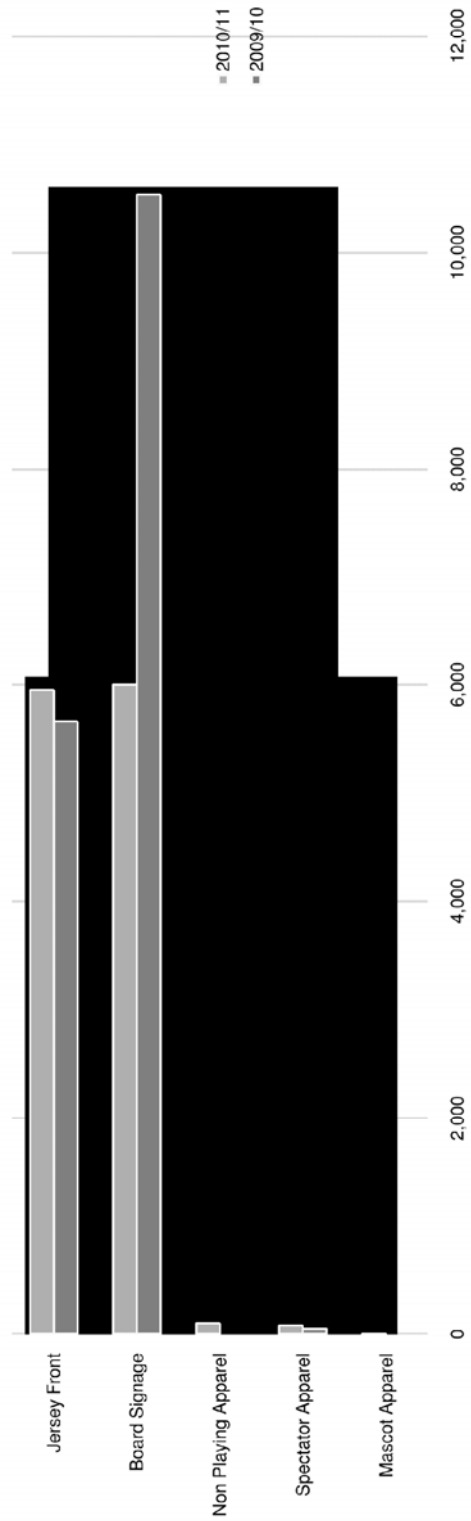


Chart: Dedicated Exposure Time by Inventory - YOY





2.1.2 Central Coast – Television Peripheral Coverage

The following table highlights television peripheral exposure by inventory:

Inventory	Exposures	Duration	100% Media Equivalency	RBA+ Media Value	RBA+ %
Board Signage	171	553	\$134,343	\$29,905	22.26
Jersey Front	158	266	\$61,717	\$23,345	37.83
Media Backdrop	6	37	\$17,131	\$4,750	27.73
Coach Apparel	1	2	\$681	\$269	39.47
Non Playing Apparel	1	1	\$341	\$93	27.16
TOTAL	337	859	\$214,212	\$58,361	



Chart: Peripheral Exposure Value by Inventory - YOY

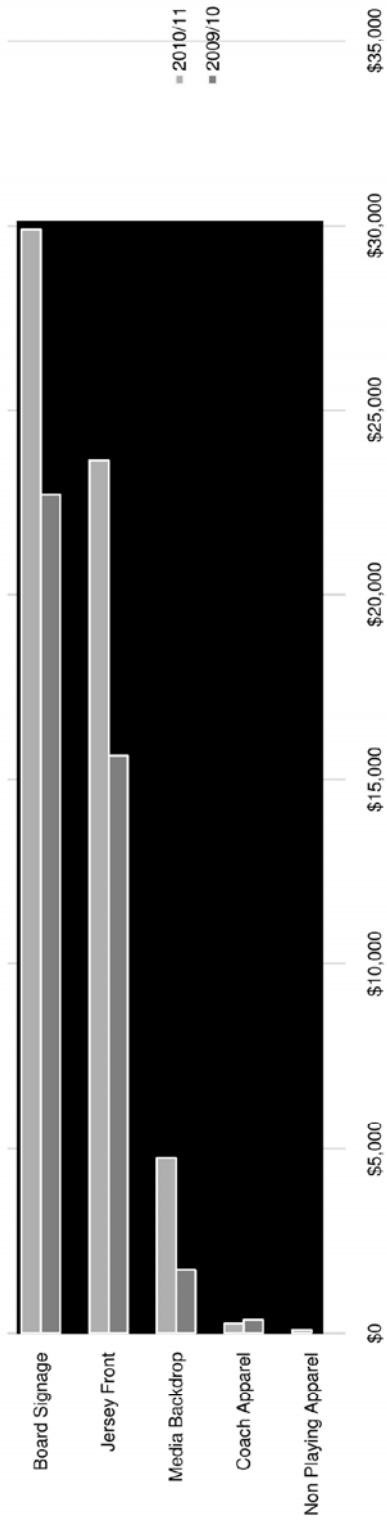
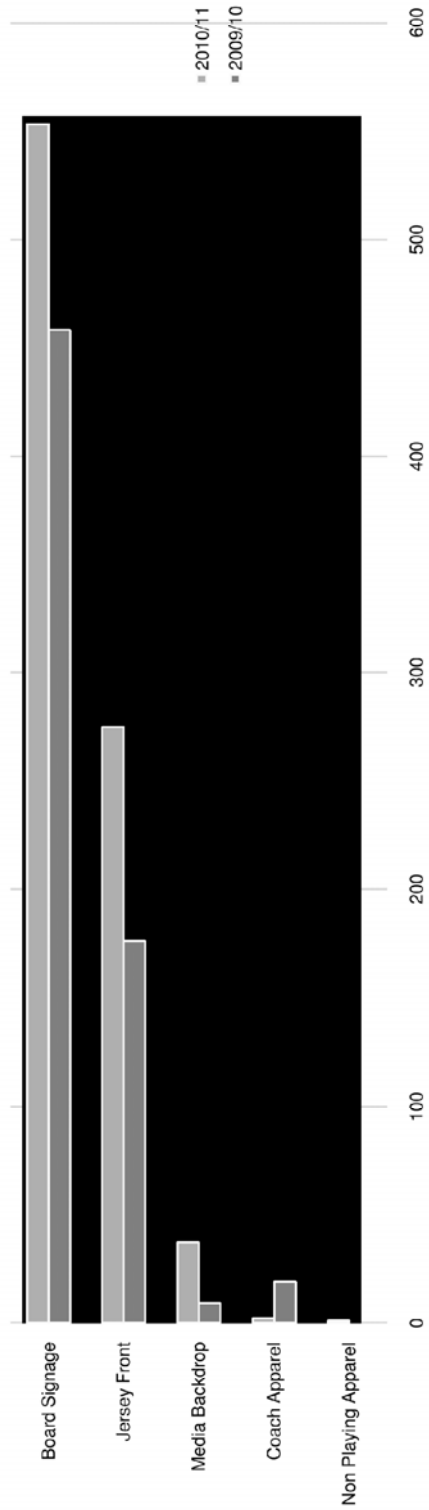


Chart: Peripheral Exposure Time by Inventory - YOY





2.1.3 Central Coast – Print Media

The following table highlights print media exposure by publication:

Publication	Appearances	Value (\$)	Publication	Appearances	Value (\$)
Pictorial			Pictorial Continued		
Daily Telegraph	24	\$31,870	Geelong Advertiser - SAT	2	\$705
Sunday Telegraph	13	\$24,892	FourFourTwo	4	\$612
Sydney Morning Herald	13	\$17,273	Illawarra Mercury - SAT	2	\$592
Central Coast Express Advocate	49	\$16,428	West Australian - SAT	1	\$475
Daily Telegraph - SAT	4	\$8,389	Sunday Canberra Times	2	\$441
Newcastle Herald	15	\$6,897	Sunday Herald Sun - Melb	1	\$226
Herald Sun - Melb	5	\$6,880	Alpha	1	\$169
The Age - Melb	4	\$5,768	Townsville Bulletin	1	\$82
Sydney Morning Herald - SAT	5	\$5,249	TOTAL	208	\$162,015
Sunday Mail - Bris	5	\$4,213			
Australian	10	\$3,644			
Canberra Times	7	\$3,330			
Herald Sun - Melb - SAT	1	\$2,784			
Sun Herald	2	\$2,727			
Adelaide Advertiser	4	\$2,478			
Illawarra Mercury	7	\$2,384			
Courier Mail - Bris	4	\$2,143			
Newcastle Herald - SAT	3	\$2,033			
West Australian	4	\$2,006			
Canberra Times - SAT	4	\$1,855			
Australian Weekend	1	\$1,474			
Sunday Mail - Ade	1	\$1,232			
Gold Coast Bulletin	5	\$1,030			
The Age - Melb - SAT	1	\$951			
Gold Coast Bulletin - SAT	3	\$782			

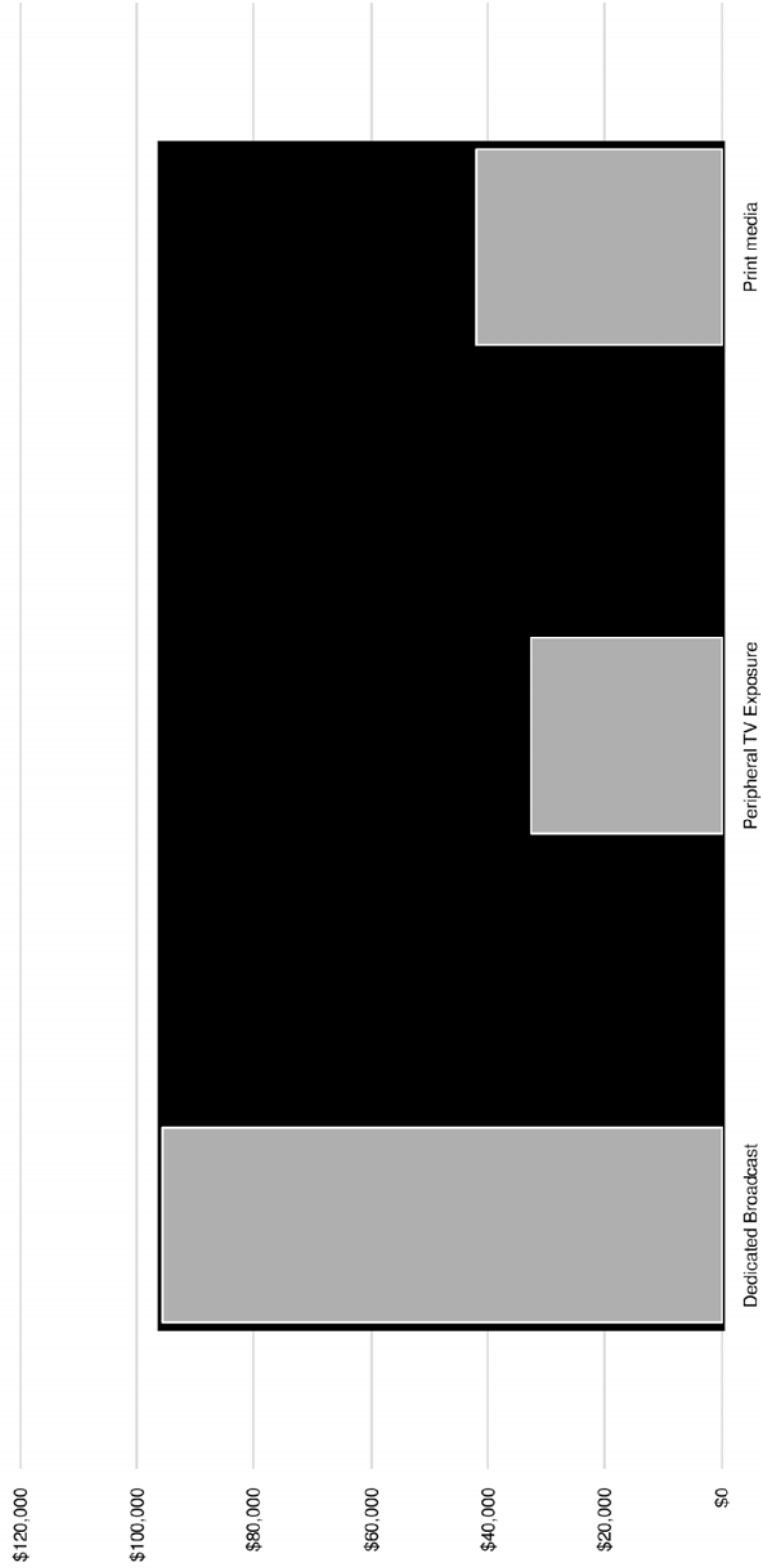


2.2 Primo Smallgoods Total Exposure Value

The total exposure value generated by Primo Smallgoods in 2010/11 was:

Year	Dedicated Television	Peripheral Television	Print	TOTAL
2010/11	\$95,690	\$32,607	\$41,992	\$170,290

Chart: Primo Smallgoods Total Exposure Value





2.2.1 Primo Smallgoods – Dedicated Television Coverage

The following table highlights dedicated television exposure by inventory:

Inventory	Exposures	Duration	100% Media Equivalency	RBA+ Media Value	RBA+ %
Jersey Back	1,724	3,162	\$209,836	\$67,464	32.15
Board Signage	970	2,301	\$100,274	\$20,188	20.13
Non Playing Apparel	110	235	\$23,287	\$7,978	34.26
Mascot Apparel	2	3	\$143	\$60	42.21
TOTAL	2,806	5,701	\$333,540	\$95,690	

2.2.2 Primo Smallgoods – Television Peripheral Coverage

The following table highlights television peripheral exposure by inventory:

Inventory	Exposures	Duration	100% Media Equivalency	RBA+ Media Value	RBA+ %
Board Signage	143	297	\$69,834	\$13,879	19.87
Jersey Back	107	150	\$36,808	\$12,448	33.82
Media Backdrop	7	40	\$14,550	\$4,706	32.34
Non Playing Apparel	15	21	\$3,788	\$1,575	41.57
TOTAL	272	508	\$124,980	\$32,607	



2.2.3 Primo Smallgoods – Print Media

The following table highlights print media exposure by publication:

Publication	Appearances	Value (\$)
Pictorial		
Daily Telegraph	5	\$9,106
Sydney Morning Herald	3	\$4,600
Australian Weekend	1	\$3,501
Sunday Telegraph	2	\$3,415
The Age - Melb - SAT	1	\$3,335
Herald Sun - Melb - SAT	2	\$2,800
Central Coast Express Advocate	7	\$2,339
Australian	4	\$2,096
Sunday Mail - Bris	2	\$1,733
Herald Sun - Melb	1	\$1,671
Canberra Times	3	\$1,576
Sun Herald	2	\$1,567
Newcastle Herald	3	\$1,517
Sunday Age - Melb	1	\$1,106
West Australian	2	\$676
Illawarra Mercury	2	\$425
Sunday Herald Sun - Melb	1	\$226
Gold Coast Bulletin	1	\$214
Geelong Advertiser	1	\$92
TOTAL	44	\$41,992

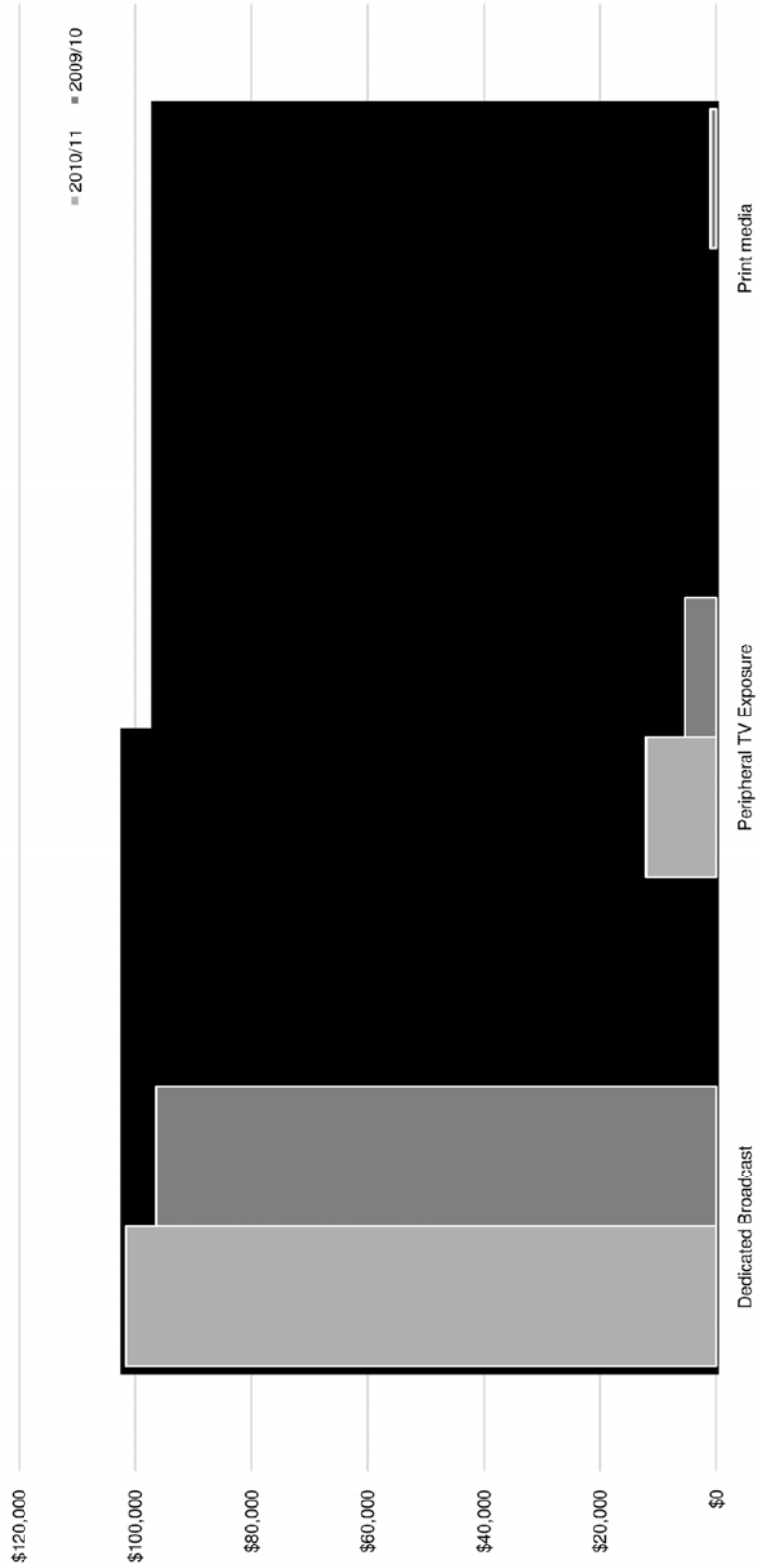


2.3 Energy Australia Total Exposure Value

The total exposure value generated by Energy Australia, compared to 2009/10 was:

Year	Dedicated Television	Peripheral Television	Print	TOTAL
2010/11	\$101,606	\$12,035	-	\$113,642
2009/10	\$96,459	\$5,417	\$1,009	\$102,885

Chart: Energy Australia Total Exposure Value





2.3.1 Energy Australia – Dedicated Television Coverage

The following table highlights dedicated television exposure by inventory:

Inventory	Exposures	Duration	100% Media Equivalency	RBA+ Media Value	RBA+ %
Board Signage	3,919	15,065	\$685,757	\$101,163	14.75
Scoreboard Signage	43	63	\$2,537	\$444	17.49
TOTAL	3,962	15,128	\$688,294	\$101,606	

2.3.2 Energy Australia – Television Peripheral Coverage

The following table highlights television peripheral exposure by inventory:

Inventory	Exposures	Duration	100% Media Equivalency	RBA+ Media Value	RBA+ %
Media Backdrop	9	53	\$21,480	\$6,613	30.78
Board Signage	60	120	\$27,645	\$5,370	19.42
Scoreboard Signage	2	2	\$286	\$53	18.61
TOTAL	71	175	\$49,411	\$12,035	

2.3.3 Energy Australia – Print Media

Energy Australia recorded no print media exposure during the tracking period.

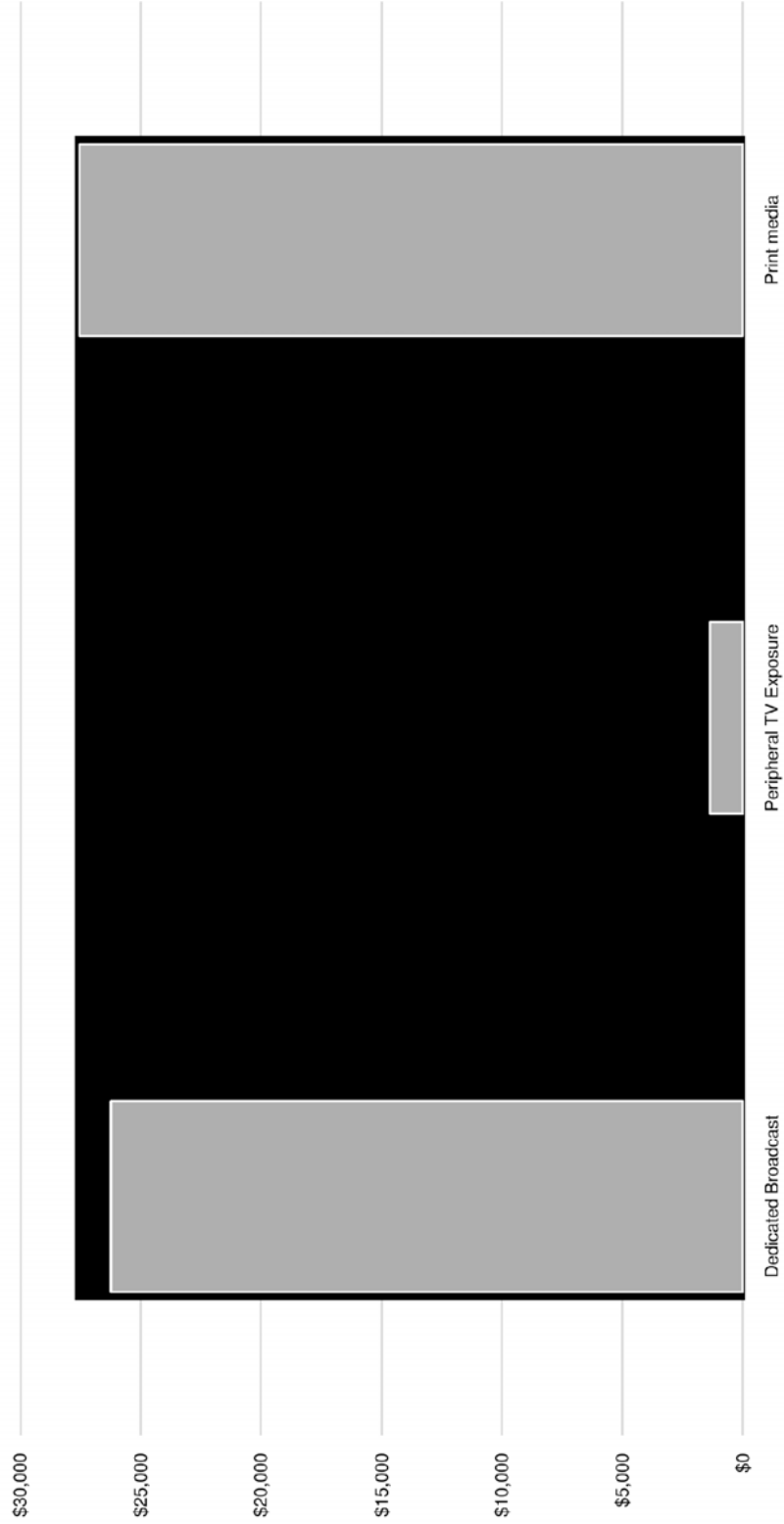


2.4 Wyong Shire Council Total Exposure Value

The total exposure value generated by Wyong Shire Council was:

Year	Dedicated Television	Peripheral Television	Print Media	TOTAL
2010/11	\$26,236	\$1,364	\$27,544	\$55,143

Chart: Wyong Shire Council Total Exposure Value





2.4.1 Wyong Shire Council – Dedicated Television Coverage

The following table highlights dedicated television exposure by inventory:

Inventory	Exposures	Duration	100% Media Equivalency	RBA+ Media Value	RBA+ %
Board Signage	912	2,912	\$141,375	\$23,881	16.89
Shorts	56	83	\$8,182	\$2,355	28.79
TOTAL	968	2,995	\$149,556	\$26,236	

2.4.2 Wyong Shire Council – Television Peripheral Coverage

The following table highlights television peripheral exposure by inventory:

Inventory	Exposures	Duration	100% Media Equivalency	RBA+ Media Value	RBA+ %
Board Signage	20	24	\$5,090	\$1,198	23.54
Shorts	1	2	\$437	\$165	37.80
TOTAL	21	26	\$5,527	\$1,364	



2.4.3 Wyong Shire Council – Print Media

The following table highlights print media exposure by publication:

Publication	Appearances	Value (\$)
Editorial		
Central Coast Express Advocate	5	\$337
Sub Total	5	\$337
Pictorial		
Daily Telegraph	4	\$4,770
Sydney Morning Herald	4	\$4,603
The Age - Melb - SAT	1	\$3,335
Central Coast Express Advocate	8	\$2,524
Sunday Telegraph	1	\$2,294
Daily Telegraph - SAT	1	\$2,285
Newcastle Herald	3	\$1,645
Courier Mail - Bris	1	\$1,441
Australian	2	\$1,020
Adelaide Advertiser	2	\$853
Illawarra Mercury	2	\$534
Sunday Mail - Bris	1	\$523
Gold Coast Bulletin	2	\$435
Sun Herald	1	\$321
Canberra Times	2	\$256
West Australian	1	\$200
Canberra Times - SAT	1	\$168
Sub Total	37	\$27,207
TOTAL	42	\$27,544

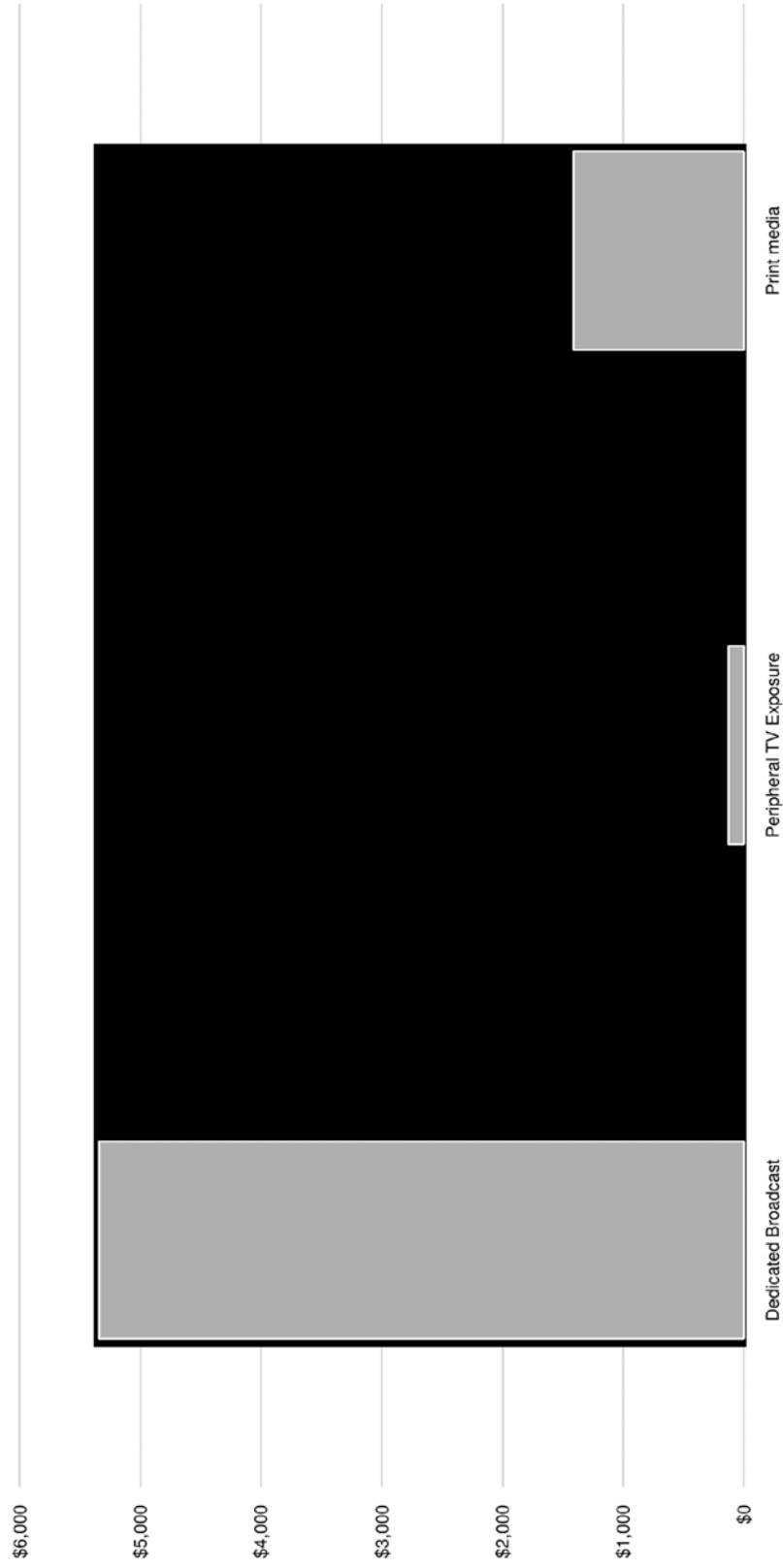


2.5 Central Coast Holiday Parks Total Exposure Value

The total exposure value generated by Central Coast Holiday Parks was:

Year	Dedicated Television	Peripheral Television	Print Media	TOTAL
2010/11	\$5,344	\$129	\$1,413	\$6,887

Chart: Central Coast Holiday Parks Total Exposure Value





2.5.1 Central Coast Holiday Parks – Dedicated Television Coverage

The following table highlights dedicated television exposure by inventory:

Inventory	Exposures	Duration	100% Media Equivalency	RBA+ Media Value	RBA+ %
Board Signage	147	374	\$30,105	\$5,344	17.75
TOTAL	147	374	\$30,105	\$5,344	

2.5.2 Central Coast Holiday Parks – Television Peripheral Coverage

The following table highlights television peripheral exposure by inventory:

Inventory	Exposures	Duration	100% Media Equivalency	RBA+ Media Value	RBA+ %
Board Signage	1	3	\$656	\$129	19.68
TOTAL	1	3	\$656	\$129	

2.5.3 Central Coast Holiday Parks – Print Media

The following table highlights print media exposure by publication:

Publication	Appearances	Value (\$)
<i>Pictorial</i>		
Sydney Morning Herald	2	\$1,413
TOTAL	2	\$1,413



3.0 Inventory Identification





Inventory Identification Continued

Wyong Shire Council - Board Signage



Primo Smallgoods - Mariners Jersey Back



Primo Smallgoods - Board Signage



Central Coast Holiday Parks - Board Signage



Central Coast Business - Non Playing Apparel



Primo Smallgoods - Mariners Non Playing Apparel

