

WISE Australia

Autumn'08 edition

Regional TAM WISE Australia is a quarterly newsletter, produced by AGB Nielsen Media Research Australia, intended to promote Television Audience Measurement knowledge within regional TV networks, agency subscribers and other, interested parties.

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Economic diversity key to regional success

Regional economies are expanding as a result of strong employment growth and the diversification of industry and services - resulting in broader job opportunities that attract new residents and provide improved incomes.

Over the past 10 years the level of unemployment in regional Australia has fallen by half from over 9% in 1997 to 4.5% last year.

As the graph below shows regional unemployment mirrors the national trend and falls occurred despite the localised impacts of droughts in much of rural Australia during 2002/03 and 2006/07.

The Fruits of Economic Success: Falling Unemployment



Source: Australian Bureau of Statistics and Economics@ANZ

As well as increased participation in the workforce the nature of regional employment has changed over the past decade. Since the turn of the century the greatest regional employment growth has been in the higher paying managerial and professional sectors with a corresponding fall in the proportion of clerical white collar and semi skilled or unskilled workers.

Unsurprisingly the overall proportion of the regional workforce in the professional and managerial sector is lower than capital cities however the rate of growth in this sector has been higher in regional. This trend has contributed to proportionally higher growth in regional household incomes.

Occupation Change 2001 – 2007				
Occupation	Regional		Metro	
	Dec 07	% change	Dec 07	% change
Professional/Manager	25%	+31%	34%	+23%
White Collar	31%	-12%	33%	-13%
Skilled	15%	-3%	12%	-9%
Semi Skilled/Unskilled	24%	-4%	21%	+1%

Resources and agriculture set to boom

The resources boom has clearly had a huge impact on the Australian economy insulating us from the worst effects of the credit crunch and US downturn. The most recent forecast from ABARE (Australian Bureau of Resource and Agriculture Economics) predicts commodity exports will be up 30% to \$189 billion in FYR 09. In regional TV markets the number of people employed directly in mining has grown by 59% in the past 7 years from 93,000 to 148,000.

The greatest concentration of mining employment is in the Hunter Valley, central Queensland, South Australia and Western Australia. Outside of a global financial crisis few commentators are predicting much slowdown in the demand for Australian coal and metals over the coming decade.

The impact of mining is demonstrated by the growth in household income in Regional TV Diary Markets. As the chart below shows the average household income in these areas is over \$90,000 per annum and grew by almost 40% in just 6 years.

Average Household Income 2001 – 2007			
	Dec 2007	Dec 2001	% Change
Regional Aggregate Markets	86,300	63,710	+35%
Diary Markets	90,110	65,360	+38%
Metro Markets	95,180	77,410	+23%

Over the same period capital city income grew by just over 20% while incomes for the majority of regional Australian grew on average by 35%.

On the farming front there is also good news. In the short term the end of the drought means agricultural exports are predicted to grow by 18% next year with farmers' incomes doubling to an average of \$78,000.

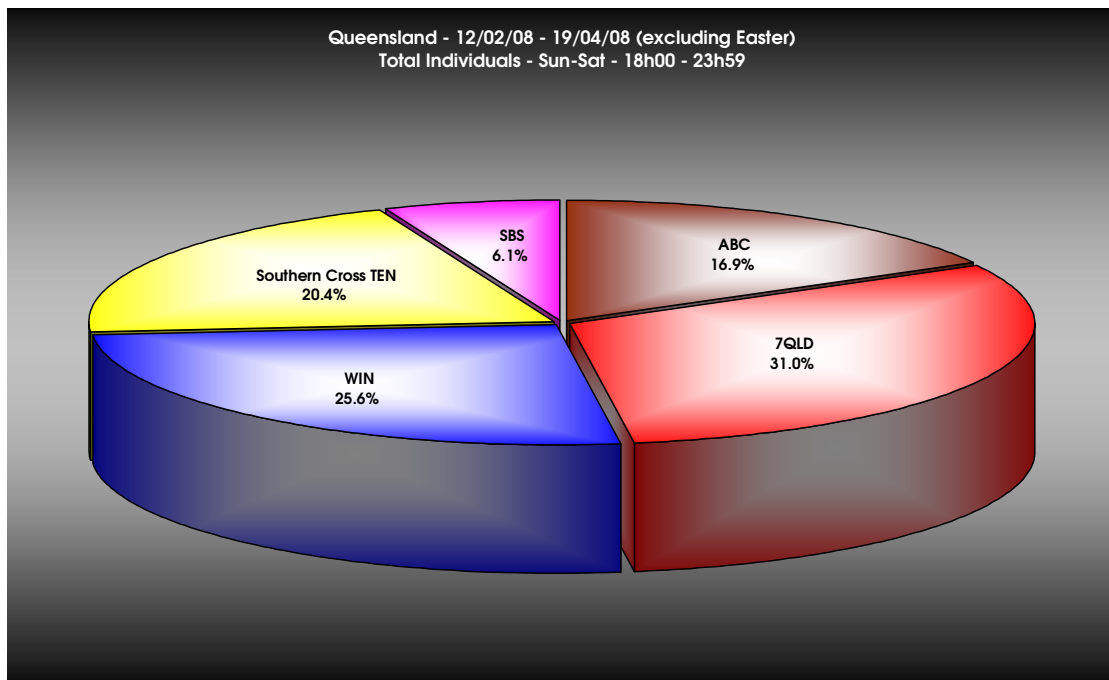
In the long term there is no doubt that farming in Australia will be subject to a structural overhaul due to climate change and the increase in the cost of water. However the dramatic growth in value of food commodities due to population growth and use of grain crops as a fuel source will be good news for regional economies for many years into the future.

Newcastle: Steel City Reborn

Newcastle is a good example of a regional centre that has been successful in building an enterprise culture over the past 10 years. Following the demise of heavy industry centred on steel making the main growth industries are now healthcare, education, communications, tourism and construction. Over 80% of Newcastle's 7500 businesses employ less than 10 people and 84% of all employees are employed in the service sector. (Source ABS).

source: www.regionaltvmarketing.com.au

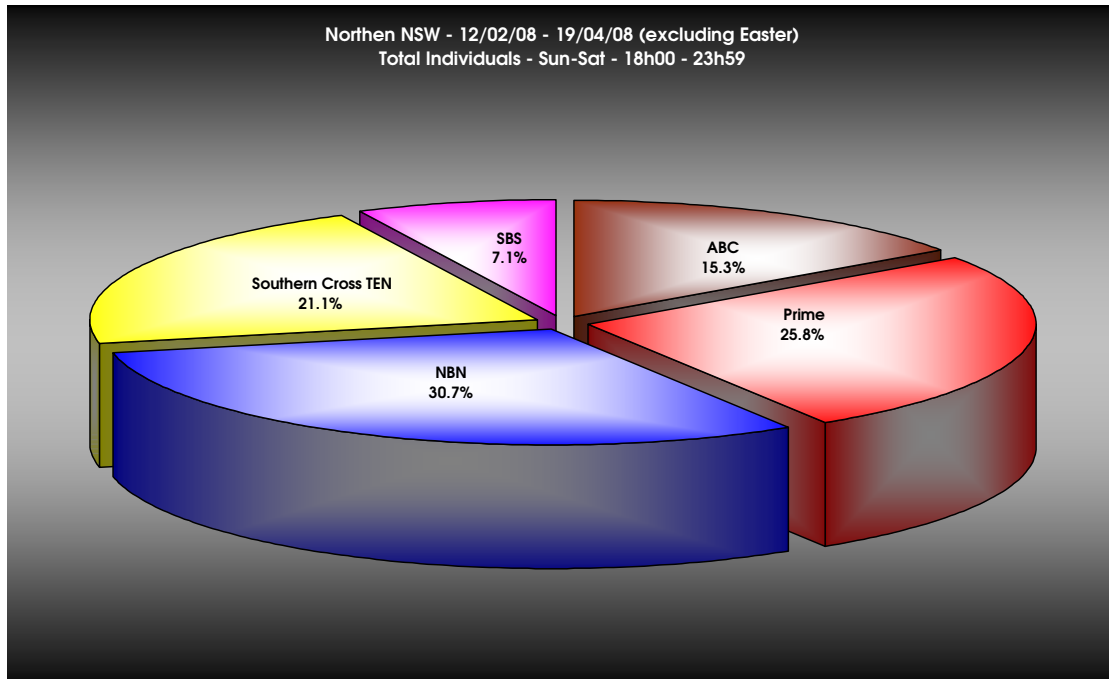
Highlights from Surveys 1&2, 2008 from Queensland



Top 20 Ranking programmes from Surveys 1&2, 2008

Rank	Description (grouped)	Channel	'000s
1	Border Security - Australia's Front Line (R)	7QLD	214
2	Border Security - Australia's Front Line	7QLD	204
3	The Force - Behind The Line	7QLD	203
4	RSPCA Animal Rescue	7QLD	192
5	1 Day Cricket – Australia v India - 1st Final Session 2	WIN	191
6	News	7QLD	190
7	1 Day Cricket – Australia v India - Game 4 Session 2	WIN	182
8	News/TT	7QLD	178
9	Sea Patrol II The Coup	WIN	177
10	Live Friday Night Football	WIN	176
11	SCU: Serious Crash Unit	7QLD	174
12	Seven News - Sun	7QLD	172
13	The Zoo	7QLD	170
14	1 Day Cricket – Australia v India - Game 10 Session 2	WIN	167
15	1 Day Cricket – Australia v India - 2nd Final Session 2	WIN	166
16	Bush Doctors	7QLD	164
17	The Real Seachange	7QLD	162
18	Gladiators	7QLD	160
19	It Takes Two	7QLD	159
20	60 Minutes	WIN	158

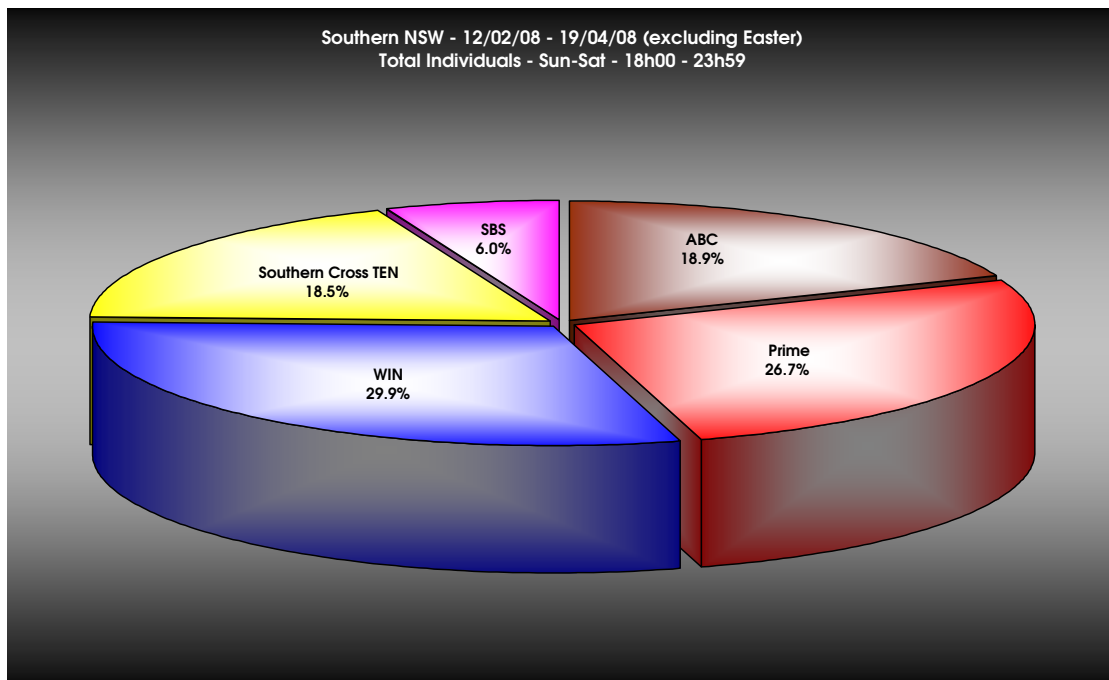
Highlights from Surveys 1&2, 2008 from Northern NSW



Top 20 Ranking programmes from from Surveys 1&2, 2008

Rank	Description (grouped)	Channel	'000s
1	Underbelly	NBN	232
2	10 To 1	NBN	209
3	National News Sunday	NBN	204
4	60 Minutes	NBN	204
5	Live Friday Night Football	NBN	193
6	RSPCA Animal Rescue	Prime	191
7	One Day Cricket - Australia V India - Game 10 Session 2	NBN	190
8	Sea Patrol li - The Coup	NBN	189
9	Border Security - Australia's Front Line (R)	Prime	184
10	CSI: Crime Scene Investigation	NBN	183
11	NCIS	Sth Cross Ten	182
12	The Force - Behind The Line	Prime	181
13	Ramsay's Kitchen Nightmares -Rpt	NBN	179
14	Gladiators	Prime	179
15	Border Security - Australia's Front Line	Prime	176
16	A Current Affair	NBN	175
17	One Day Cricket - Australia V India - Game 4 Session 2	NBN	174
18	It Takes Two	Prime	174
19	Seven News	Prime	172
20	One Day Cricket - Australia V India - Game 7 Session 2	NBN	170

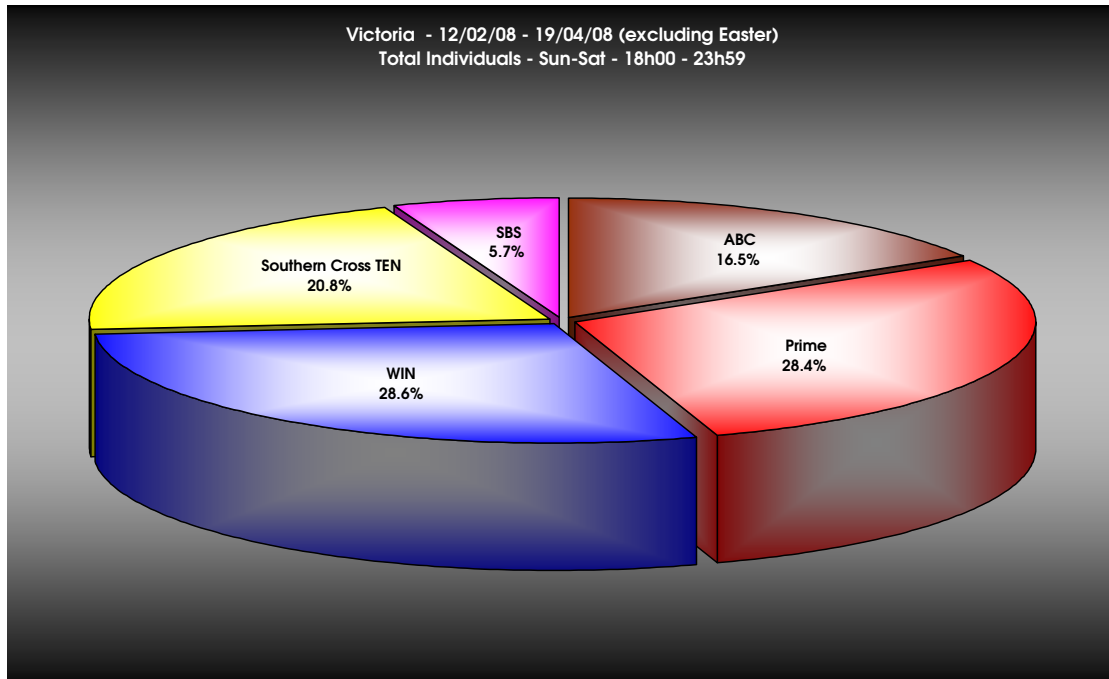
Highlights from Surveys 1&2, 2008 from Southern NSW



Top 20 Ranking programmes Surveys 1&2, 2008

Rank	Description (Grouped)	Channel	'000s
1	Underbelly	WIN	176
2	One Day Cricket - Australia V India - 1st Final Session 2	WIN	157
3	One Day Cricket - Australia V India - 2nd Final Session 2	WIN	156
4	Live Friday Night Football	WIN	152
5	Border Security - Australia's Front Line (R)	Prime	152
6	Canal Road	WIN	150
7	Doc Martin-Ev	ABC	146
8	RSPCA Animal Rescue	Prime	146
9	Ramsay's Kitchen Nightmares	WIN	144
10	60 Minutes	WIN	142
11	Ramsay's Kitchen Nightmares -Rpt	WIN	141
12	All Saints	Prime	139
13	National News Sunday	WIN	138
14	The Force - Behind The Line	Prime	137
15	Border Security - Australia's Front Line	Prime	136
16	News	Prime	136
17	Doc Martin Rpt	ABC	135
18	Sea Patrol II - The Coup	WIN	132
19	10 To 1	WIN	131
20	One Day Cricket - Australia V India - Game 10 Session 2	WIN	131

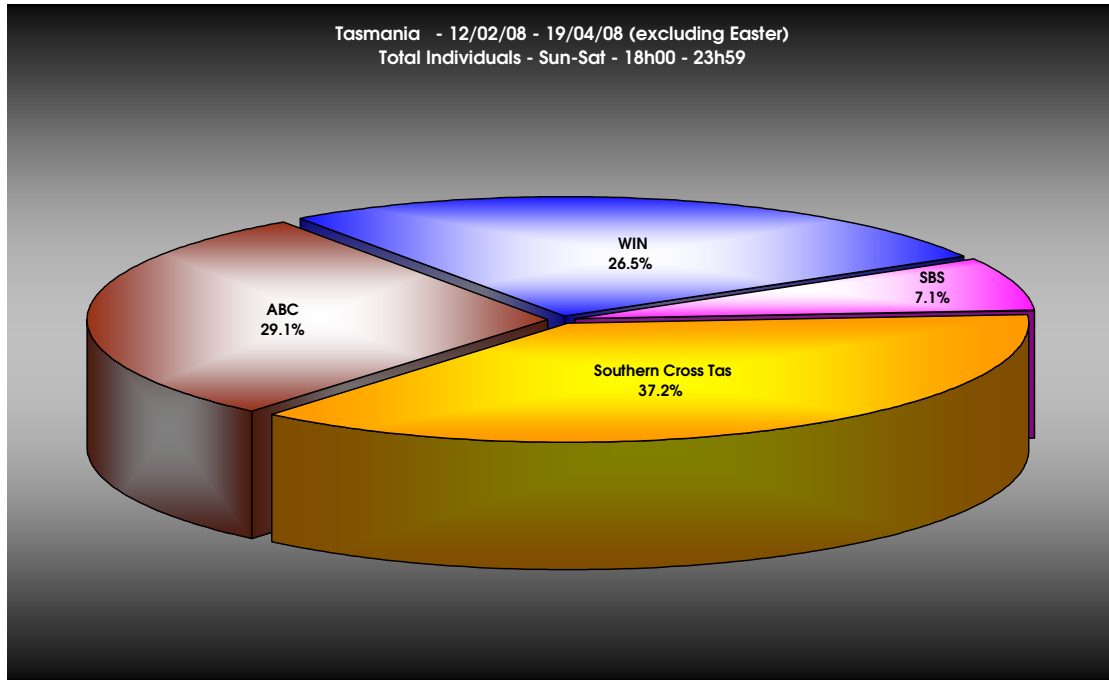
Highlights from Surveys 1&2, 2008 from Victoria



Top 20 Ranking programmes Surveys 1&2, 2008

Rank	Description (grouped)	Channel	'000s
1	Border Security - Australia's Front Line (R)	Prime	156
2	One Day Cricket - Australia V India - 2nd Final Session 2	WIN	151
3	Enough Rope With Andrew Denton-Le	ABC	151
4	One Day Cricket - Australia V India - 1st Final Session 2	WIN	150
5	Ramsay's Kitchen Nightmares -Rpt	WIN	149
6	Seven's AFL: Rnd 5: St Kilda Vs Essendon	Prime	147
7	Seven's AFL: Rnd 4: Essendon Vs Western Bulldogs	Prime	145
8	One Day Cricket - Australia V India - Game 4 Session 2	WIN	144
9	One Day Cricket - Australia V Sri Lanka - Game 6 Session 2	WIN	143
10	60 Minutes	WIN	140
11	One Day Cricket - Australia V India - Game 10 Session 2	WIN	139
12	CSI: Crime Scene Investigation	WIN	139
13	RSPCA Animal Rescue	Prime	134
14	Seven's AFL: Rnd 3: Western Bulldogs Vs St Kilda	Prime	133
15	Sea Patrol II The Coup	WIN	132
16	One Day Cricket - Australia V India - Game 7 Session 2	WIN	131
17	RPA	WIN	129
18	Better Homes And Gardens	Prime	129
19	Seven's AFL: Rnd 4: Carlton Vs Collingwood	Prime	127
20	The Force - Behind The Line	Prime	127

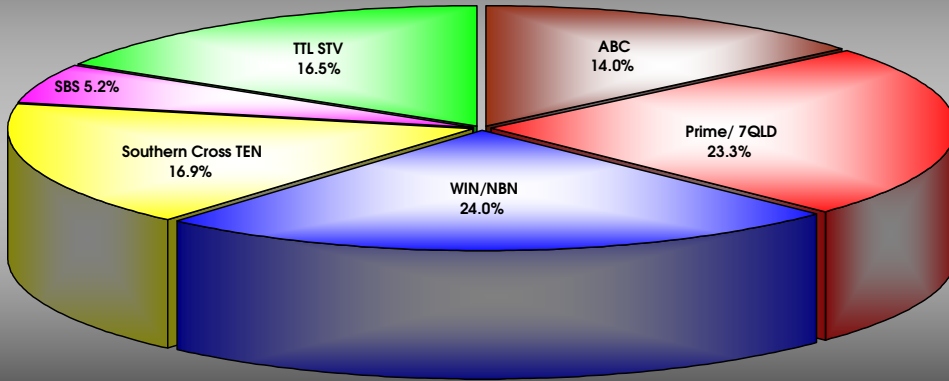
Highlights from Surveys 1&2, 2008 from Tasmania



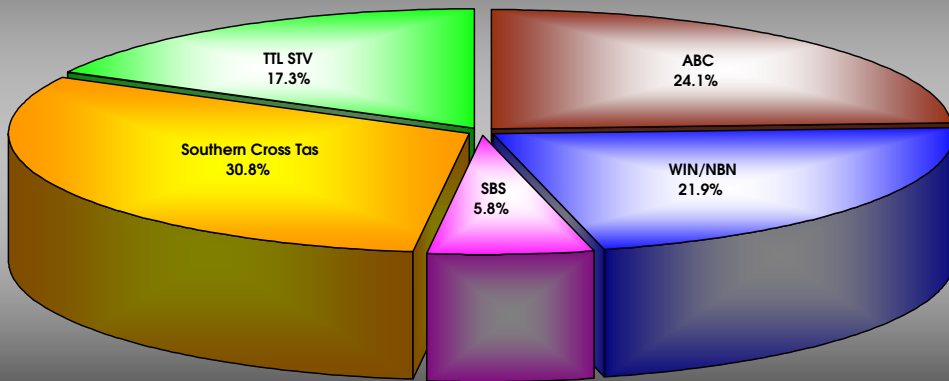
Top 20 Ranking programmes Surveys 1&2, 2008

Rank	Description (grouped)	Channel	'000s
1	Samanatha Who?	Southern Cross Tas	92
2	Doc Martin-Ev	ABC	91
3	Border Security - Australia's Front Line	Southern Cross Tas	87
4	Real Seachange , The	Southern Cross Tas	85
5	Home And Away	Southern Cross Tas	83
6	Nightly News Weekdays	Southern Cross Tas	82
7	RSPCA Animal Rescue	Southern Cross Tas	82
8	Doc Martin Rpt	ABC	79
9	Agatha Christie's Miss Marple: Ordeal By Innocence-Ev	ABC	79
10	The Force - Behind The Line	Southern Cross Tas	77
11	Today Tonight	Southern Cross Tas	77
12	ABC News-Sa	ABC	77
13	2008 AFL St Kilda V Essendon	Southern Cross Tas	75
14	Border Security - Australia's Frontline	Southern Cross Tas	74
15	How I Met Your Mother	Southern Cross Tas	74
16	Bill-Ev	ABC	73
17	Gladiators	Southern Cross Tas	73
18	Dalziel And Pascoe-Ev	ABC	73
19	The Real Seachange	Southern Cross Tas	73
20	Midsomer Murders Rpt	ABC	73

Combined Agg. Mkts excl. Tas - 12/02/08 - 19/04/08 (excluding Easter)
Total Individuals - Sun-Sat - 18h00 - 23h59



Tasmania - 12/02/08 - 19/04/08 (excluding Easter)
Total Individuals - Sun-Sat - 18h00 - 23h59



From Free TV Australia:

On May 19th, 2008, Free TV Australia issued a release welcoming the figures released by the Australian Communications and Media Authority (ACMA) confirming the metropolitan commercial television licensees exceeded their Australian content quota in 2007.

The ACMA figures reveal all the metropolitan licensees exceeded the minimum 55 per cent Australian content quota and met the annual requirement for 250 points for first release Australian drama programs. The commercial networks also met all the quota requirements for children's programming.

Ms Julie Flynn, CEO of Free TV Australia said, "The figures confirm the broadcasters' commitment to producing the very best quality Australian programming."

"The role of Free TV in supporting the local drama production industry is a significant one. The free-to-air commercial broadcasters invest 70 per cent of their program expenditure in locally produced content and continue to be the major underwriters of Australian production."

The recently released Australian Film Commission's National Production Survey for 2006/07 also shows the commercial free-to-air broadcasters make the largest contribution of any sector to the combined TV drama slate.

A review of the top rating programs on Free TV last year also reveals Australia's appetite for local programming.

ACMA Chairman, Chris Chapman, said, "I am pleased to note that Australian programs fared well in the ratings for 2007 with the 40 highest rating shows for the year all Australian. In the top rated programs by genre, Australian shows dominated, claiming all 20 top spots in the Light Entertainment and Reality genre, a clean sweep in the Sports program category and five of the 20 top rated dramas."

TV News from around the Globe: United Kingdom

Rank	Programme	Channel	Total Viewers
1	EURO 2008: MATCH OF THE DAY LIVE (SUN 1856)	BBC1	8,840,000
2	DOCTOR WHO (SAT 1911)	BBC1	8,780,000
3	EASTENDERS (MON 1959)	BBC1	8,610,000
4	CORONATION STREET (MON 1933)	ITV1	8,560,000
5	CORONATION STREET (FRI 2031)	ITV1	8,530,000
6	CORONATION STREET (MON 2030)	ITV1	8,460,000
7	CORONATION STREET (FRI 1934)	ITV1	8,440,000
8	EASTENDERS (FRI 2002)	BBC1	8,240,000
9	CORONATION STREET (WED 1930)	ITV1	7,660,000
10	EASTENDERS (THU 1929)	BBC1	7,420,000
11	EURO 2008: MATCH OF THE DAY LIVE (WED 1929)	BBC1	6,950,000
12	EURO 2008 LIVE (THU 1929)	ITV1	6,770,000
13	TEN O'CLOCK NEWS (WED 2200)	BBC1	6,450,000
14	EMMERDALE (MON 1902)	ITV1	6,370,000
15	EASTENDERS (TUE 1928)	BBC1	6,240,000
16	EMMERDALE (FRI 1902)	ITV1	6,130,000
17	EMMERDALE (WED 1900)	ITV1	5,980,000
18	CASUALTY (SAT 2050)	BBC1	5,880,000
19	EMMERDALE (THU 1859)	ITV1	5,850,000
20	BBC NEWS (SUN 2215)	BBC1	5,320,000

Source: www.barb.co.uk/ - "Terrestrial viewing summary - Individuals 4+ (Including Timeshift) - w/e 29/06/2008

Snippets:

Ofcom issues their 18th report covering developments in multichannel television covering the period for Qtr 1, 2008.

Key findings:

- ◇ Based on our recently revised research methodology, the three months to the end of March 2008 saw multichannel TV take-up on main sets increase by 190,000 homes, or 0.7 percentage points (pp), from 86.5% to 87.2% and by 6.9pp year-on-year. The free platforms (DTT and free satellite) accounted for two thirds of this net growth, with the three pay platforms (cable, pay satellite and IPTV) accounting for the remainder.

- ◇ With a majority of main sets now already receiving digital TV, many consumers are now converting additional sets in the home; over half (53%) of all secondary TV sets had been converted to multichannel by the end of Q1.
- ◇ Taking these figures together, the proportion of all TV sets converted to multichannel passed two thirds (68%) in Q1 2008, with the remaining 32% continuing to receive only analogue terrestrial broadcasts. This means that over the last twelve months, the proportion of analogue terrestrial sets fell by over 11 percentage points from around 44% in Q1 2007 to 32% by Q1 2008.
- ◇ Nearly 22.2m million households had multichannel TV equipment connected to their primary television set by the end of the period.
- ◇ DTT device sales reached over three million during the period, an increase of 55% on Q1 2007. This followed on from four million sales in Q4 2007 (which is traditionally a high quarter in the run up to Christmas). Of the three million sales in Q1, integrated digital television sets (IDTVs) accounted for around 1.9 million units - up 116% on twelve months ago - while set-top boxes accounted for approaching 1.2 million, up 6% on the previous year. Over the past year over 11 million DTT units have been sold, compared to around 7 million in the previous year.
- ◇ DTT-only households accounted for almost a third (31%) of all growth in main-set multichannel TV homes in Q1, rising by around 75,000 to over 9.6 million homes.
- ◇ Free-to-view digital satellite increased by around 80,000 homes in the quarter, contributing over a third of net additions to multichannel main sets. Our research figures show that around 700,000 homes are currently using free satellite on their main set. Total free-to-view digital households (DTT and free satellite) have now reached 39% or approaching 10m homes.
- ◇ Research results for Q1 showed that the total number of homes using pay and free satellite had reached 36.6% or 9.3 million. (According to BSkyB, its pay satellite subscriber base rose by 43,000 to reach over 8.3 million subscribers in the UK by the end of the quarter).
- ◇ Research results for Q1 showed that cable was the primary viewing platform in 12.5% of homes. (Virgin Media reported another positive quarter, adding around 37,000 net new subscribers to exceed 3.5 million subscribers by the end of Q1. Digital cable added almost 58,000 subscribers in the quarter (including conversions from analogue cable) and now makes up 94% of the total cable subscriber base).

The full report can be accessed www.ofcom.co.uk

Britons watch more TV, reports IPA

Nationwide viewing levels recorded an increase for the third consecutive quarter, resulting in average daily viewing hours of 3.63 hours for 2007, compared to 3.60 hours in 2006.

In terms of audience share, BBC1 and ITV1 both enjoyed a robust fourth quarter – respectively grabbing shares of 22.4% and 19.7%. In particular, BBC1 enjoyed an increased share of viewing of 24.7% during the Christmas week.

Demographically, individual channel performances retain largely the same pattern they've held for some time. The strong bias of the non-analogue audience toward young age groups is the key feature of the report's findings.

Digital reception continues to grow and now covers over 82% of all television households. Digital terrestrial (as opposed to satellite and cable) platforms remain the fastest growing and now serve 47% of the TV population.

Patronage levels for the main channels (and for TV overall) are at about the same levels as a year ago. Patronage of the non-analogue channels is now over 75% for the first time.

source: warc.com

Sky subs base swells, ITV hurts

BSkyB added 56,000 new customers in the first quarter of 2008 to take its customer base to nearly 9 million.

It now has a total of 8,888,000 pay-TV customers in the UK and Ireland, keeping it on track to hit its target 10 million by 2010. The company also said that it had signed up another 262,000 customers to its personal video recorder service Sky+, putting it in 3,393,000 households, or 38 per cent of its overall base. Churn marked a four-year low at 10.5 per cent.

Sky Broadband customer numbers were up 229,000 to reach 1,428,000 at the end of March. The company aims to have 3 million broadband customers, or 30 per cent of its subscriber base, by 2010. Sky said it added 43,000 high-definition subscribers, taking its tally to 465,000 at the end of March. Its Sky Talk telephone business grew by 180,000 to 1,095,000.

The growth in each segment helped ARPU to £424 (€530) ahead of forecasts.

However, financial results were hit by write-downs on the ITV investment.

Revenues for the quarter of rose to £1.25 billion from £1.2 billion for the same period in 2007, but after further impairments on its 18 per cent ITV stake, pre-tax profit fell from £200 million to £56 million and the company recorded a loss after tax of £6 million. For the nine months to March 31, the overall impairment charge of £474 million on the ITV investment meant a pre-tax loss of £118 million compared with a profit of £388 million in 2006-07, but that disguised a 10 per cent increase in revenues.

Source: advanced-television.com

TV News from around the Globe: United States

Season-to-Date by Viewers

2007 - 2008 Season Through July 6, 2008

Rank	Program Name	Net	Day	Time	Total Viewers	Total no. of Episodes
1	AMERICAN IDOL	FOX	Tue	8:00 PM	28,894,000	19
2	AMERICAN IDOL	FOX	Wed	VAR	27,927,000	18
3	DANCING W/THE STARS	ABC	Mon	8:00 PM	21,672,000	10
4	DANCING WITH THE STARS	ABC	Mon	8:00 PM	19,728,000	10
5	DANCING W/STARS RESULT	ABC	Tue	9:00 PM	19,565,000	9
6	DANCING W/STARS RESULTS	ABC	Tue	9:00 PM	18,235,000	9
7	HOUSE	FOX	Tue	9:00 PM	17,643,000	16
8	NBC SUNDAY NIGHT FOOTBALL	NBC	Sun	VAR	15,872,000	16
9	CSI	CBS	Thu	9:00 PM	15,393,000	38
10	DESPERATE HOUSEWIVES	ABC	Sun	9:00 PM	15,192,000	22
11	SURVIVOR: CHINA	CBS	Thu	8:00 PM	15,183,000	11
12	GREY'S ANATOMY	ABC	Thu	9:00 PM	14,328,000	25
13	NCIS	CBS	Tue	8:00 PM	13,808,000	37
14	SURVIVOR: MICRONESIA	CBS	Thu	8:00 PM	13,607,000	12
15	LOST	ABC	Thu	9:00 PM	13,402,000	15
16	CSI: MIAMI	CBS	Mon	10:00 PM	13,221,000	35
17	TWO AND A HALF MEN	CBS	Mon	9:00 PM	13,149,000	35
18	HEROES	NBC	Mon	9:00 PM	13,071,000	11
19	EXTREME MAKEOVER:HOME ED.	ABC	Sun	8:00 PM	12,659,000	29
20	WITHOUT A TRACE	CBS	VAR	10:01 PM	12,383,000	36

Source: Zapa2it.com

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