

# WISE Australia

Quarter 1, 2010 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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### Regional sales growing at double the national average

New car sales in regional Australia were up by 21% for the last 3 months of 2009 compared to the same period the year before. Car sales in the capital cities grew by 9% showing the worst of the fallout from the GFC appears over across the country.

New car sales for all of Australia for the full year were down by 7%. Regional sales for Jan-Dec outperformed the national trend but were nevertheless down by 4% year on year.

Regional NSW was the best performing new car market over the course of 2009 with sales decline of only 1% vs. 2008.

The strongest segments for new vehicle sales last year in regional markets were: SUV Luxury (+11%), Sports Cars (+15%), Light Commercial (+3%) and Small & Compact SUV no change.

### All segments to grow

The last three months of 2009 point to a strong recovery in national car sales in 2010 with the total number sold likely to surpass the magic 1 million mark last achieved in 2008.

The good news for Regional is that new vehicle sales in all segments grew well above the capital city trend over October to December.

<b>Growth by segment Oct-Dec 2009 vs. 2008</b>			
	<b>Regional</b>	<b>Metro</b>	<b>Reg. share of national sales</b>
Light (< \$25k)	+3%	-4%	32%
Small (< \$40k)	+13%	+11%	29%
Medium (< \$60k)	+9%	-4%	26%
Large (< \$70k)	+4%	-9%	29%
SUV	+35%	+26%	36%
Luxury	+45%	+25%	18%
PU/CC	+34%	+23%	50%
<b>Total market</b>	<b>+20%</b>	<b>+9%</b>	<b>34%</b>

Source:VFACTS Jan 2010

Small (under \$40K) is the largest selling new car segment by volume and has grown consistently in regional for the past ten years as consumers shift to a more urbanised and environmentally friendly lifestyle. The SUV segment has made a remarkable recovery and should outperform in the year ahead. SUV sales now represent over 20% of all new cars sold in Australia.

Sales of light commercial vehicles, dominated by PU/CC (Pick up and cab chassis), are directly linked to the strength of the economy as they are the primary tool of trades people and small business. Last year this segment easily outperformed the overall new car sales trend due to government incentives, especially in regional markets where infrastructure investment has been at its highest. The light commercial segment now represents almost 20% of all new vehicles sold in Australia and half are sold to regional buyers.

Luxury still booming Luxury car sales in regional markets have grown above the national trend for the past 5 years as affluent baby boomers find they can indulge in the car of their choice once their kids have left home. Medium \$70K+ and Luxury SUV are the two biggest luxury segments and both are likely to post strong growth in regional again in 2010.

<b>Fastest growing brands Oct - Dec 2009</b>		
	Regional	Metro (Rank)
1 Audi	+64%	+30% (4)
2 Lexus	+63%	+42% (2)
3 Hyundai	+61%	+43% (1)
4 BMW	+46%	+9% (13)
5 Mitsubishi	+39%	+24% (7)

Source:VFACTS Jan 2010

Three out of the five fastest growing car brands in regional markets are luxury manufacturers. Audi continues its spectacular regional growth following a change in media strategy in late 2008 to significantly increase investment in

regional TV. Audi invested 26% of national Free to Air TV ad spend to regional over the course of 2009. Audi's newest addition to the range the Q5 SUV derives 1 in 4 national sales from regional buyers.

### **Regional getting more ad dollars**

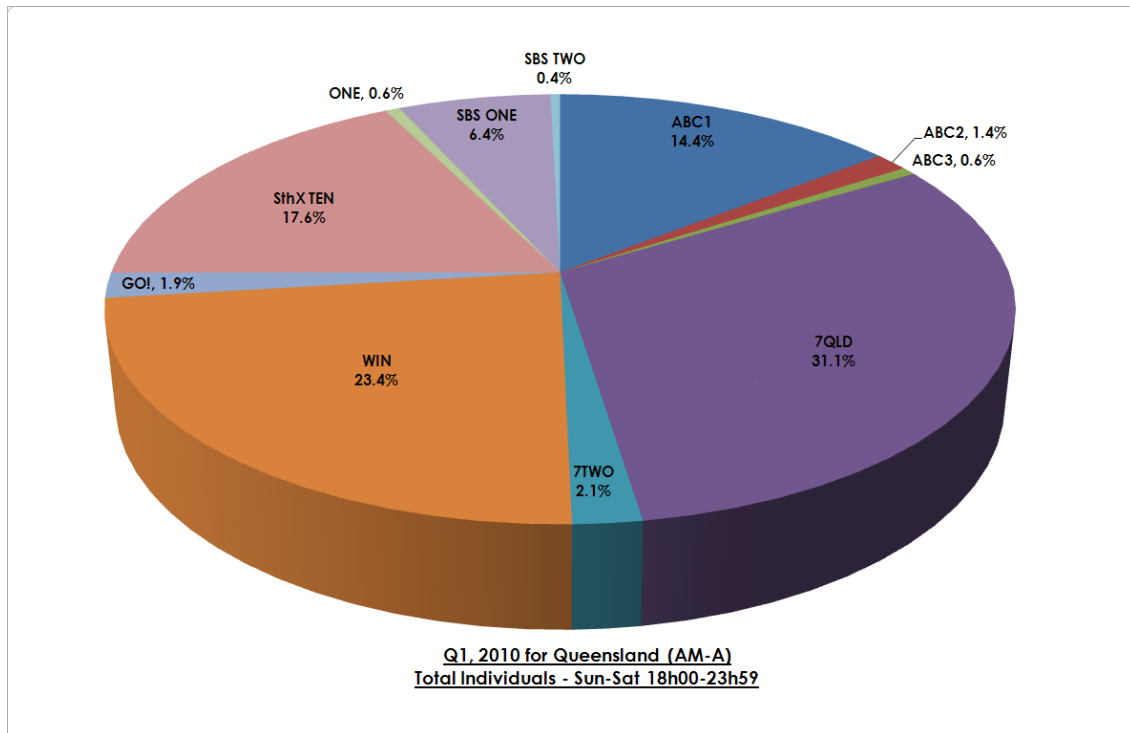
Last year saw a big decline in advertising spend within the automotive category due to the GFC with total free to air TV spend down 22% to \$305m. There was a small silver lining for regional TV as it increased its share of available advertising revenue for the fifth year in a row. The average share of TV budget allocated to regional markets in 2009 within the category was 24%.

Toyota was the biggest Regional TV advertiser in 2009 spending \$5.7m. Holden and Ford were the next largest with \$5.1m RTV spend each. Given that regional markets deliver 34% of national vehicles sales to advertisers, the regional TV component obviously delivers significantly higher return on investment.

*\*All TV spend estimates from Nielsen/Adquest*

source: [www.regionaltvmarketing.com.au](http://www.regionaltvmarketing.com.au)

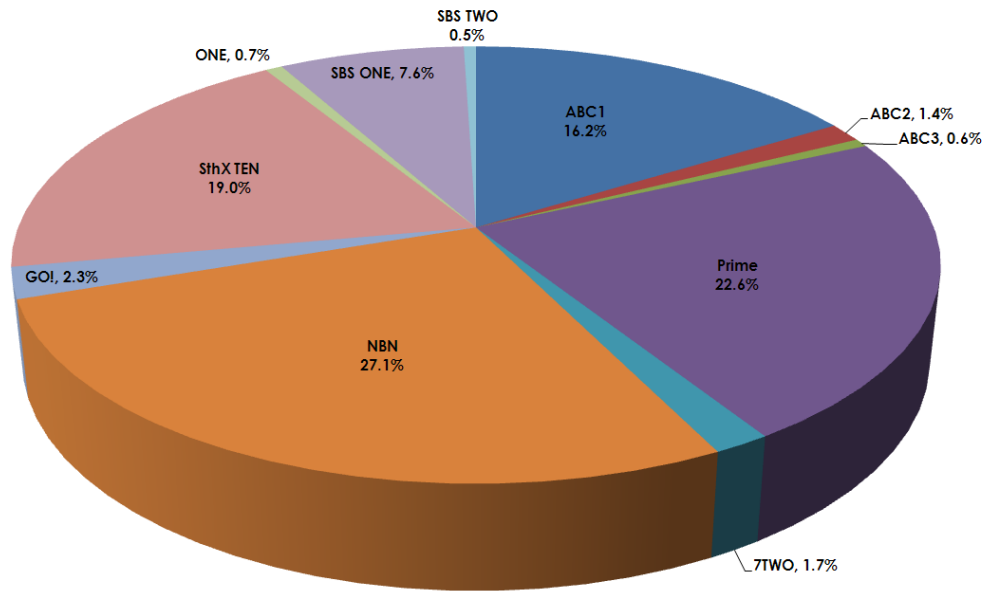
## Highlights from Q1, 2010 from Queensland



## Top 20 Ranking programmes from Q1, 2010

Rank	Description (grouped)	Channel	'000s
1	SEVEN'S TENNIS: 2010 AUST OPEN - MEN'S FINAL	7QLD	212,540
2	BORDER SECURITY - AUSTRALIA'S FRONT LINE-TUE (R)	7QLD	195,945
3	INDIGENOUS ALL STARS V NRL ALL STARS	WIN	191,134
4	CRIMINAL MINDS-EP.1 (R)	7QLD	190,786
5	THE FORCE - BEHIND THE LINE (R)	7QLD	188,268
6	RSPCA ANIMAL RESCUE	7QLD	183,311
7	BORDER SECURITY - AUSTRALIA'S FRONT LINE	7QLD	182,026
8	SNEAK PEEK: DESPERATE HOUSEWIVES	7QLD	180,994
9	SEVEN'S TENNIS: 2010 AUST OPEN - MEN'S FINAL INTRODUCTION	7QLD	180,614
10	NEWS	7QLD	180,422
11	AIR WAYS	7QLD	180,133
12	SEVEN NEWS - SUN	7QLD	179,101
13	EYE OF THE LEOPARD	7QLD	178,736
14	NEWS/TT	7QLD	177,487
15	SUNDAY NIGHT	7QLD	177,229
16	SNEAK PEEK: MY KITCHEN RULES	7QLD	176,919
17	LIVE FRIDAY NIGHT FOOTBALL	WIN	176,593
18	TOP GEAR -EP 1	WIN	175,775
19	SEVEN'S TENNIS: 2010 AUST OPEN - WOMEN'S FINAL	7QLD	174,640
20	BONES	7QLD	174,421

## Highlights from Q1, 2010 from Northern NSW

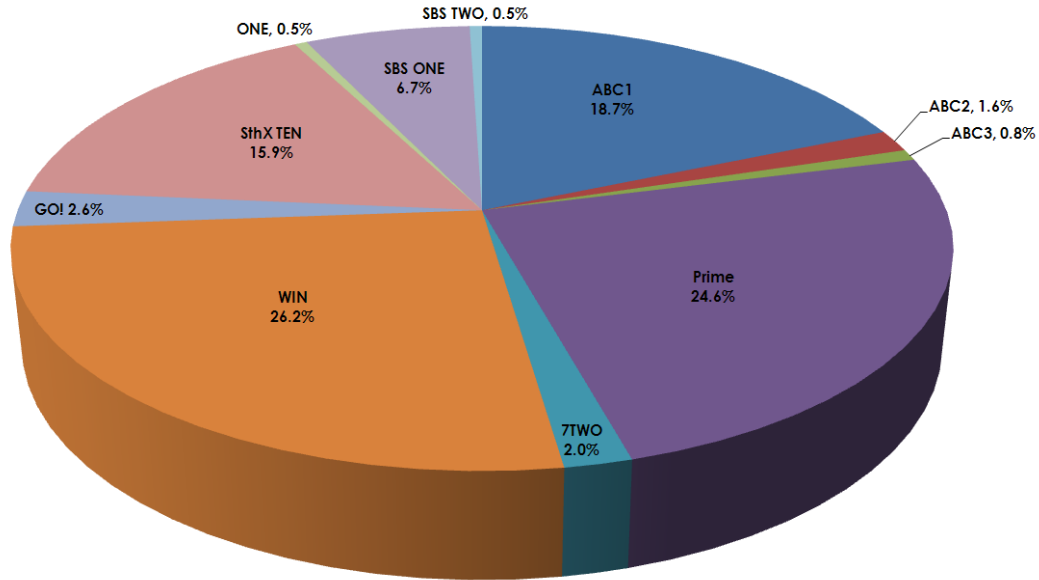


**Q1, 2010 for Northern NSW (AM-B)**  
Total Individuals - Sun-Sat - 18h00-23h59

## Top 20 Ranking programmes from Q1, 2010

Rank	Description (grouped)	Channel	'000s
1	SEVEN'S TENNIS: 2010 AUST OPEN - MEN'S FINAL	Prime	196,463
2	NATIONAL NEWS SUNDAY	NBN	171,732
3	ONE DAY CRICKET - AUSTRALIA V WEST INDIES - GAME 4 SESSION 1	NBN	170,699
4	ONE DAY CRICKET - AUSTRALIA V WEST INDIES - GAME 2 SESSION 2	NBN	169,555
5	ONE DAY CRICKET - AUSTRALIA V WEST INDIES - GAME 1 SESSION 2	NBN	165,591
6	NCIS	SthX TEN	164,623
7	TWENTY/20 - AUSTRALIA V WEST INDIES - GAME 1	NBN	162,123
8	SEVEN'S FOOTY SHOW	Prime	161,765
9	THE MENTALIST	NBN	158,563
10	TWENTY/20 - AUSTRALIA V WEST INDIES - GAME 2	NBN	157,943
11	ONE DAY CRICKET - AUSTRALIA V WEST INDIES - GAME 4 SESSION 2	NBN	153,668
12	ONE DAY CRICKET - AUSTRALIA V PAKISTAN - GAME 1 SESSION 2	NBN	153,044
13	LIVE FRIDAY NIGHT FOOTBALL	NBN	151,978
14	SEVEN'S TENNIS: 2010 AUST OPEN - WOMEN'S FINAL	Prime	151,358
15	SNEAK PEEK: DESPERATE HOUSEWIVES	Prime	151,247
16	SEVEN'S TENNIS: 2010 AUST OPEN - DAY 8 NIGHT SESSION	Prime	145,013
17	TOP GEAR -SPECIAL	NBN	144,520
18	THE MARRIAGE REF: SNEAK PEEK	Prime	139,533
19	TWENTY/20 - AUSTRALIA V PAKISTAN	NBN	139,484
20	TOP GEAR -EP 1	NBN	137,545

## Highlights from Q1, 2010 from Southern NSW

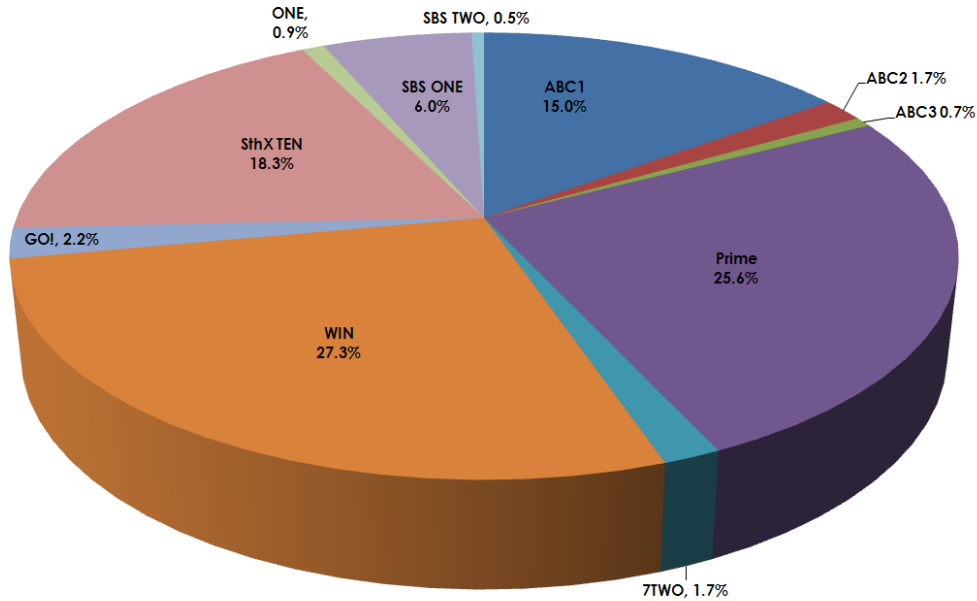


Q1, 2010 for Southern NSW (AM-C)  
Total Individuals - Sun-Sat - 18h00-23h59

## Top 20 Ranking programmes from Q1, 2010

Rank	Description (Grouped)	Channel	'000s
1	SEVEN'S TENNIS: 2010 AUST OPEN - MEN'S FINAL	Prime	152,192
2	NCIS	SthX TEN	146,067
3	SEVEN'S TENNIS: 2010 AUST OPEN - WOMEN'S FINAL	Prime	139,927
4	TOP GEAR -RPT	WIN	138,809
5	EDINBURGH MILITARY TATTOO 2009-EV	ABC1	134,286
6	ONE DAY CRICKET - AUSTRALIA V PAKISTAN - GAME 1 SESSION 2	WIN	132,194
7	ONE DAY CRICKET - AUSTRALIA V PAKISTAN - GAME 2 SESSION 2	WIN	129,339
8	SEVEN'S TENNIS: 2010 AUST OPEN - MEN'S FINAL INTRODUCTION	Prime	127,025
9	ONE DAY CRICKET - AUSTRALIA V PAKISTAN - GAME 3 SESSION 2	WIN	126,292
10	ONE DAY CRICKET - AUSTRALIA V WEST INDIES - GAME 1 SESSION 2	WIN	126,073
11	CRASH INVESTIGATION UNIT (R)	Prime	123,974
12	TWENTY/20 - AUSTRALIA V PAKISTAN	WIN	122,788
13	SEVEN'S TENNIS: 2010 AUST OPEN - DAY 8 NIGHT SESSION	Prime	121,258
14	RSPCA ANIMAL RESCUE (R)	Prime	121,153
15	I DREAMED A DREAM - THE SUSAN BOYLE STORY	WIN	118,781
16	ONE DAY CRICKET - AUSTRALIA V WEST INDIES - GAME 1 SESSION 1	WIN	118,131
17	A CURRENT AFFAIR	WIN	117,363
18	BORDER SECURITY - AUSTRALIA'S FRONT LINE-TUE (R)	Prime	116,855
19	CRIMINAL MINDS-EP.1 (R)	Prime	116,780
20	SPICKS AND SPECKS-EV	ABC1	116,213

## Highlights from Q1, 2010 from Victoria

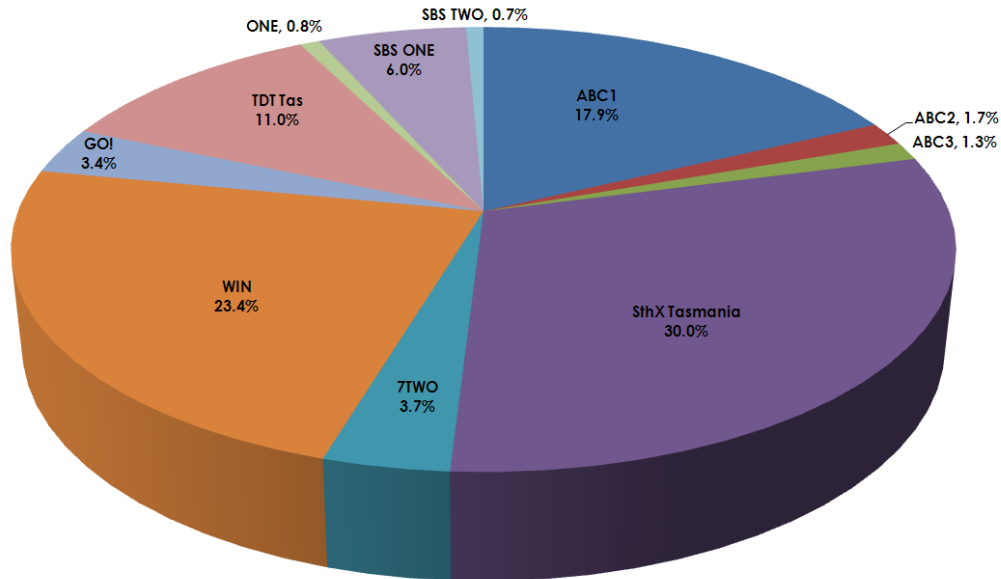


Q1, 2010 for Victoria (AM-D)  
Total Individuals - SUN-Sat - 18h00-23h59

## Top 20 Ranking programmes from Q1, 2010

Rank	Description (grouped)	Channel	'000s
1	SEVEN'S TENNIS: 2010 AUST OPEN - MEN'S FINAL	Prime	234,067
2	SEVEN'S TENNIS: 2010 AUST OPEN - WOMEN'S FINAL	Prime	187,022
3	SEVEN'S TENNIS: 2010 AUST OPEN - MEN'S FINAL INTRODUCTION	Prime	164,662
4	TWENTY/20 - AUSTRALIA V PAKISTAN	WIN	153,228
5	SEVEN'S TENNIS: 2010 AUST OPEN - WOMEN'S FINAL PRESENTATION	Prime	143,014
6	SEVEN'S TENNIS: 2010 AUST OPEN - DAY 8 NIGHT SESSION	Prime	142,572
7	SEVEN'S TENNIS: 2010 AUST OPEN - MEN'S FINAL PRESENTATION	Prime	142,318
8	TWENTY/20 - AUSTRALIA V WEST INDIES - GAME 1	WIN	139,599
9	SEVEN'S TENNIS: 2010 AUST OPEN - DAY 10 NIGHT SESSION	Prime	139,542
10	WICKED LOVE: THE MARIA KORP STORY	WIN	135,356
11	ONE DAY CRICKET - AUSTRALIA V WEST INDIES - GAME 4 SESSION 2	WIN	133,490
12	I DREAMED A DREAM - THE SUSAN BOYLE STORY	WIN	132,966
13	TOP GEAR -EP 1	WIN	128,745
14	SEVEN'S TENNIS: 2010 AUST OPEN - WOMEN'S FINAL INTRODUCTION	Prime	123,258
15	SEVEN'S AFL: RND 1: GEELONG VS ESSENDON	Prime	122,609
16	MIGHTY SHIPS: BECRUX	Prime	121,913
17	SEVEN'S TENNIS: 2010 AUST OPEN - DAY 11 NIGHT SESSION	Prime	120,944
18	ONE DAY CRICKET - AUSTRALIA V PAKISTAN - GAME 2 SESSION 2	WIN	120,111
19	ONE DAY CRICKET - AUSTRALIA V WEST INDIES - GAME 1 SESSION 2	WIN	118,518
20	TWENTY/20 - AUSTRALIA V WEST INDIES - GAME 2	WIN	118,346

## Highlights from Q1, 2010 from Tasmania

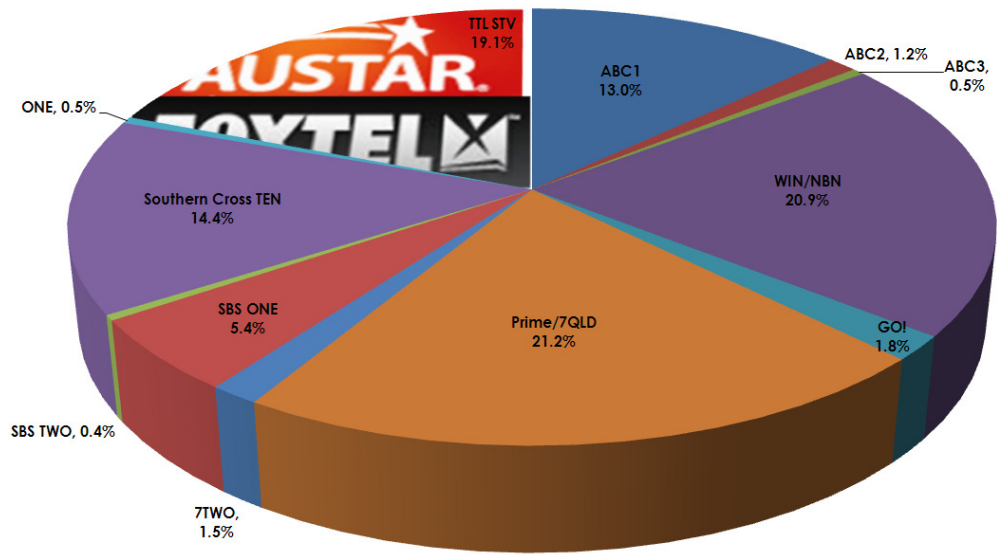


Q1, 2010 for Tasmania  
Total Individuals - Sun-Sat - 18h00-23h59

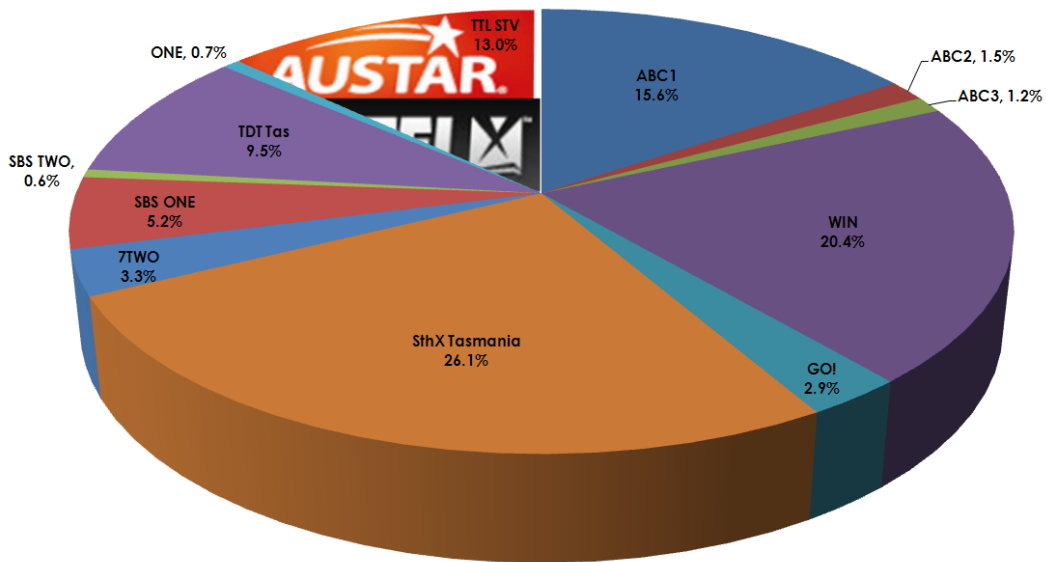
## Top 20 Ranking programmes from Q1, 2010

Rank	Description (grouped)	Channel	'000s
1	MY KITCHEN RULES - MONDAY	SthX Tas	76,831
2	TASMANIAN STATE ELECTION: TASMANIA VOTES 2010-EV	ABC1	76,827
3	BORDER SECURITY: AUSTRALIA'S FRONT LINE	SthX Tas	73,328
4	I DREAMED A DREAM - THE SUSAN BOYLE STORY	WIN	70,669
5	MY KITCHEN RULES - TUESDAY	SthX Tas	70,603
6	THE FORCE - BEHIND THE LINE	SthX Tas	69,171
7	MY KITCHEN RULES MONDAY	SthX Tas	68,775
8	SOUTHERN NEWS WEEKDAYS	SthX Tas	64,102
9	MY KITCHEN RULES - MONDAY	SthX Tas	61,514
10	SCTV NEWS WEEKDAYS	SthX Tas	60,987
11	60 MINUTES	WIN	60,146
12	SCTV NEWS SUNDAY	SthX Tas	58,454
13	TOP GEAR -EP 1	WIN	57,885
14	CRIMINAL MINDS	SthX Tas	57,355
15	WIN NEWS SUNDAY	WIN	57,178
16	TODAY TONIGHT	SthX Tas	56,796
17	THE TRANSPORTER	SthX Tas	56,537
18	HOME AND AWAY	SthX Tas	56,209
19	BONES	SthX Tas	56,169
20	RSPCA ANIMAL RESCUE	SthX Tas	55,883





**Combined Agg Markets (excluding Tasmania) Q1, 2010**  
Total Individuals - Sun-Sat - 18h00-23h59



**Tasmania Q1, 2010**  
Total Individuals - Sun-Sat - 18h00-23h59

## From Free TV Australia:

### Free TV welcomes recognition of industry role in delivering Australian Content.

Free TV Australia today welcomed the announcement by the Rudd Government that it will provide licence fee rebates to protect Australian content on commercial television.

Ms Julie Flynn, Free TV CEO said, "The licence fee rebates are a timely recognition of the key role played by commercial broadcasters in delivering Australian content on television.

"The recent success of programs such as Packed to the Rafters, Underbelly and Masterchef highlight the broadcasters' continuing commitment to providing Australian viewers with quality local content. It also demonstrates the continued affection of Australian viewers for these programs."

Flynn adds, "Free TV broadcasters are the major underwriters of Australian content despite the challenge of competing media platforms and fragmenting audiences.

"But it is clear that as we moved to a converged media environment the basis for the old system of licence fees needs to be reviewed. The existing system has been in place since 1964 and has not been reviewed since 1987, said Flynn.

Independent analysis by Venture Consulting shows Australian broadcasting licence fees are out of step with international best practice when compared with other countries whether measured as a percentage of industry revenue, a percentage of GDP or on a per capita basis. Refer attached chart.

"The rebates announced by Communications Minister Stephen Conroy will allow Free TV broadcasters to continue their level of commitment to Australian content as we make a successful transition to digital only services."

Flynn said, "Free TV is committed to working with the government to ensure that all Australian viewers receive the benefits of digital free-to-view television including better quality pictures and sound and more choice for free."

#### International TV Licence Fee Comparisons

	Australia	UK	Canada	New Zealand	USA
FTA Industry LC Fees	282,000,000	36,300,000†	29,780,000 ††	723,000*	18,607,125
FTA Industry A\$ Fees	282,000,000	65,880,200	31,460,000	597,500	21,265,300
Population	21,779,000	61,113,000	33,487,000	4,213,400	307,212,000
\$ per head	\$12.95	\$1.08	\$0.94	\$0.14	\$0.07
A\$m GDP	1,095,624	3,017,143	1,726,857	146,857	16,297,000
GDP %	0.025%	0.000002%	0.000018%	0.000009%	0.0001%
FTA Industry rev (LC '000s)	3,625,300	2,461,000	2,171,000	654,000	46,385,364**
FTA Industry rev (\$A '000s)	3,625,300	4,466,424	2,293,471	540,496	53,011,845
Licence fee % of Industry rev	7.779%	1.475%	1.372%	0.111%	0.04%

† A small portion of the UK licence fee figure is estimated due to Group level reporting by Channel 5  
†† Canadian licence fees are estimated based on information from the Canadian Radio-Television  
Telecommunications Commission  
\* - Licence fees exclude spectrum acquisition costs  
\*\* - US revenue figures are sourced from the Television Bureau of Advertising.  
Compiled October 2009.

**Source: media release February 7, 2010**

## TV News from around the Globe: United Kingdom

Rank	Programme Name	Network	Viewers
1	CORONATION STREET (MON 2031)	ITV1	10,930,000
2	CORONATION STREET (MON 1934)	ITV1	10,210,000
3	A TOUCH OF FROST (MON 2104)	ITV1	9,940,000
4	ITV NEWS HEADLINES (MON 2215)	ITV1	9,630,000
5	EASTENDERS (MON 1959)	BBC1	9,290,000
6	CORONATION STREET (FRI 1932)	ITV1	8,780,000
7	EASTENDERS (TUE 1931)	BBC1	8,740,000
8	EASTENDERS (THU 1928)	BBC1	8,480,000
9	CORONATION STREET (THU 2031)	ITV1	8,480,000
10	EASTENDERS (FRI 2001)	BBC1	8,320,000
11	DOCTOR WHO (SAT 1820)	BBC1	7,930,000
12	EMMERDALE (MON 1902)	ITV1	7,890,000
13	CORONATION STREET (SUN 1944)	ITV1	7,520,000
14	EMMERDALE (THU 2000)	ITV1	7,200,000
15	EMMERDALE (TUE 1901)	ITV1	7,190,000
16	FOYLE'S WAR (SUN 2015)	ITV1	7,080,000
17	EMMERDALE (WED 1859)	ITV1	7,080,000
18	UEFA CHAMPIONS LEAGUE LIVE (WED 1929)	ITV1	7,040,000
19	EMMERDALE (FRI 1901)	ITV1	6,900,000
20	EMMERDALE (THU 1900)	ITV1	6,890,000

Source: [www.barb.co.uk/](http://www.barb.co.uk/) Terrestrial viewing summary - individuals 4+ (including timeshift) - week ending April 11, 2010

### Snippets:

A recently released summary of technology by OfCom makes interesting reading.

Digital television	
Number of UK homes with digital TV	92% (Q1 2010)
Number of TVs in the UK	60m (end 2009)
Number of HD TVs in the UK	24m (Q1 2010)
Number of minutes of TV people aged 4+ watch each week	225 (all viewers 4+, average in 2009)
Number of UK homes with Freeview on any set	73% (Q1 2010)
Proportion of UK homes with Freeview on their main set	40% (Q1 2010)
Digital radio	
Number of people with access to a DAB Digital Radio	35% (Q1 2010)
Proportion of listener hours through a digital platform (DAB, online, DTV)	24% (Q1 2010)
Number of digital radio stations	216 (end 2009)
Number of local radio stations	371 (end 2009)
Number of national radio stations	18 (end 2009)

<b>Internet</b>	
Number of fixed residential broadband connections in the UK	16.8 million (Q4 2009).
Proportion of adults with broadband in the UK (fixed + mobile)	71% (Q1 2010)
Proportion of adults with mobile broadband in the UK	15% (Q1 2010)
What is the market share of fixed broadband providers in the UK?	BT 26.7%, Virgin Media 22.5%, TalkTalk/AOL/Tiscali 22.8%, BSkyB 13.2%, Orange Home 4.6%, O2 3.2% Others 6.9% (end 2009)
Average broadband speed in the UK	4.1Mbit/s (April 2009)
Number of adults with a social networking profile	40% (Q1 2010)
Number of people who use their mobile handset to access the internet	18% (Q1 2010)
Number of mobile broadband (Dongles/PC datacard) subscriptions	4.1 million (end 2009)
<b>Landline/mobile phones</b>	
Number of residential fixed landlines in the UK	22.9 million (Q4 2009)
Number of fixed landlines in the UK, including ISDN channels	32.1 million fixed lines (Q4 2009)
What is the market share of fixed line providers in the UK?	BT 56.7%, Virgin Media 14.4%, others 28.8%. (Q4 2008)
Proportion of adults who personally own/use a mobile phone in the UK	89% (Q1 2010)
Proportion of adults who live in a home that has a mobile phone but no landline phone in the UK	14% (Q1 2010)
How many PAYG mobile subscriptions in the UK ?	59% (end 2009)
Number of text messages sent per mobile subscription per month	111
What is the market share per mobile provider in the UK?	O2 – 24.6% Orange – 20.6% Vodafone – 20.2% T-Mobile – 15.8% 3 – 6.2% Virgin Mobile – 5.4% Tesco – 2.5% Other – 4.7% (End 2009)
Number of 3G mobile subscriptions in the UK	32% (end 2009)

Source: [www.ofcom.co.uk](http://www.ofcom.co.uk)

## TV News from around the Globe: United States

### Weekly Ratings | Season Ratings | Cable Ratings

Nielsen Television - TV Ratings for Primetime: Season-to-Date

Top 20 Network Primetime Series

2009-2010 Season Through April 18, 2010

Rank	Program Name	Network	Viewers
1	AMERICAN IDOL-TUESDAY	FOX	25,721,000
2	AMERICAN IDOL-WEDNESDAY	FOX	24,515,000
3	DANCING WITH THE STARS	ABC	19,479,000
4	SUNDAY NIGHT FOOTBALL	NBC	19,364,000
5	NCIS	CBS	19,167,000
6	UNDERCOVER BOSS	CBS	17,609,000
7	THE MENTALIST	CBS	16,750,000
8	CSI	CBS	15,849,000
9	NCIS: LOS ANGELES	CBS	15,794,000
10	DANCING W/STARS RESULTS	ABC	15,582,000
11	CBS NFL NATL POST GAME	CBS	15,526,000
12	TWO AND A HALF MEN	CBS	14,869,000
13	SUNDAY NIGHT NFL PRE-KICK	NBC	14,482,000
14	THE BIG BANG THEORY	CBS	14,337,000
15	DESPERATE HOUSEWIVES	ABC	14,152,000
16	CRIMINAL MINDS	CBS	13,781,000
17	60 MINUTES	CBS	13,594,000
18	GREY'S ANATOMY	ABC	13,524,000
19	SURVIVOR: HEROES VS. VILLAINS	CBS	13,451,000
20	SURVIVOR: SAMOA	CBS	13,450,000

Source: Zapa2it.com

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