

WISE Australia

Summer '08/'09 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 TAM

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REGIONAL TV RATINGS SERVICE CONFIRMED to 2015

Regional Television Audience Measurement announced the renewal of its TV Ratings service with AGB Nielsen Media Research to run for an additional 6 years, commencing from 2010.

Announcing the contract, Chairman of Regional TAM, Bruce Abraham, endorsed the selection and renewal of survey contractor AGB Nielsen Media Research. "I am confident that AGBNMR will continue to provide quality television measurement services in the five aggregated television markets of Queensland, Northern NSW, Southern NSW, Victoria and Tasmania for the period 2010-2015."

David Ellem, CEO AGB Nielsen Media Research Australia, said: "Our reappointment as the Regional ratings provider in Australia is a great endorsement from Regional TAM."

Toni Petra, Regional Director AGB Nielsen Media Research, said: "We are delighted in Regional TAM's continued confidence in AGB Nielsen Media Research and are committed to meeting their evolving broadcast measurement needs."

Mr. Abraham also commented that the new service will require AGB Nielsen Media Research to include time shift viewing associated with personal video recorders, as well as live viewing, in ratings figures from 2010 onwards. "With the rollout of a full digital audience measurement service from 2010, Regional TAM will provide the same high standard of quality television audience ratings measurement data that Australian clients have enjoyed across regional television markets."

During 2009 AGB Nielsen Media Research will establish a network of TV channel reference sites throughout regional Australia to allow for a continuation of audience measurement for provision to current and prospective clients.

SUB_MARKETS - Trading Demographics vs. Analysis Demographics

When working with submarket data, it is important to note the difference between trading demographics and analysis demographics.

Trading demographics – for external purposes are defined by Regional TAM and are the only demographics which should be used when creating proposals or releasing data to clients or to market. The reason for these restricted demographics for trading relates to sample size.

Analysis demographics – for internal analysis and reporting purposes are unrestricted; i.e. you are able to produce reports on any demographic available to you in your relevant software product.

Sample size note: We do encourage you to be aware of sample size when dissecting any audience figures. This becomes particularly important when analysing on a submarket level.

SUBMARKET TRADING DEMOGRAPHICS:

1	Total Individuals	12	People 40+
2	Total Households	13	Men 16-39
3	Grocery Buyers	14	Women 16-39
4	Men 16+	15	People 16-39
5	Women 16+	16	Men 25-54
6	People 16+	17	Women 25-54
7	Men 25+	18	People 25-54
8	Women 25+	19	Men 16-54
9	People 25+	20	Women 16-54
10	Men 40+	21	People 16-54
11	Women 40+		

Please remember:

- Regional TAM data supply guidelines advise against releasing daily submarket data to clients or to market.
- Instead, Regional TAM advises analysing on longer time periods or more episodes (e.g. using a 4-weekly average) in order to minimise the standard error and bounce often experienced when analysing on a small sample size.
- All regional data to be sourced to Regional TAM.

AGGREGATE MARKET TRADING DEMOGRAPHICS:

1	Households	36	People 30+	71	Women 40+	106	GB + Child 0-12
2	Total Individuals	37	People 40+	72	Women 0-15	107	GB + Child 5-12
3	People 5+	38	People 55+	73	Women 13-24	108	GB + Child 5-17
4	People 13+	39	People 65+	74	Women 13-29	109	Feb GB
5	People 5-17	40	Children 0-12	75	Women 16-24	110	Fem GB 25-49
6	People 0-17	41	Children 2-9	76	Women 16-39	111	Occupation AB
7	People 0-24	42	Children 5-12	77	Women 16-54	112	Occ. AB 25-54
8	People 0-39	43	Teens 10-17	78	Women 18-29	113	Occ. AB 35+
9	People 0-54	44	Teens 13-17	79	Women 18-34	114	Occ. AB 40+
10	People 10-15	45	Men 0-15	80	Women 18-39	115	Occ. ABC1
11	People 16+	46	Men 18+	81	Women 18-49	116	Occ. C1
12	People 18+	47	Men 25+	82	Women 18-54	117	Occ. C1 16-39
13	People 18-39	48	Men 40+	83	Women 25-39	118	Occ. C2DE
14	People 25+	49	Men 13-24	84	Women 25-44	119	Occ. C2DE 16-39
15	People 13-24	50	Men 16-24	85	Women 25-54		
16	People 16-24	51	Men 16-39	86	Women 30-49		
17	People 16-39	52	Men 16-54	87	Women 25-54 + Child 0-17		
18	People 16-54	53	Men 16+	88	Women 35-54		
19	People 18-24	54	Men 18-29	89	Women 40-54		
20	People 18-29	55	Men 18-34	90	Women 40-64		
21	People 18-49	56	Men 18-39	91	Women 50-64		
22	People 18-54	57	Men 18-49	92	Women 55+		
23	People 25-34	58	Men 18-54	93	Grocery Buyer		
24	People 25-39	59	Men 25-39	94	GB 18+		
25	People 25-44	60	Men 25-44	95	GB 40+		
26	People 25-54	61	Men 25-54	96	GB 18-54		
27	People 30-39	62	Men 30-49	97	GB 25-54		
28	People 30-49	63	Men 35-54	98	GB 40-54		
29	People 35-54	64	Men 40-54	99	GB 55+		
30	People 25-49	65	Men 40-64	100	GB Under 40		
31	People 35-64	66	Men 50-64	101	GB Working		
32	People 40-54	67	Men 55+	102	GB Non Working		
33	People 40-64	68	Women 16+	103	GB + 0 Child 0-17		
34	People 50-64	69	Women 18+	104	GB + Child 0-17		
35	People 55-64	70	Women 25+	105	GB + 1-2 Child 0-17		

Note: indicates N/A in Tasmania



Universe Estimates for Subscription TV Households

In response to industry requests, Regional TAM is pleased to publish Universe Estimates that will apply for calendar 2009.

2009	UE(000's)					
	QLD	NNSW	SNSW	VIC	TAS	REG
STV Subscription Households*	168.7	194.1	129.3	113.2	52.8	658.1
People in STV Subscription Households*	461.9	660.7	457.0	268.1	104.9	1,952.6

These will be incorporated into the Regional Tool Kit at the next update around mid-year and be published annually from now on.

From the Minister

Package to drive digital television transition

The Rudd Government today announced a pilot package to drive the availability of improved television services as Australia makes the transition to digital.

"Digital television delivers many benefits to viewers and this package will help achieve the smoothest possible transition as we switch off analog signals," said Senator Stephen Conroy, Minister for Broadband, Communications and the Digital Economy.

"This package focuses on Australia's leading digital television region of Sunraysia, centred on the city of Mildura in north-west Victoria, and will ensure that free-to-air digital television is made available to all viewing households."

The suite of measures includes:

- a package of in-home assistance to help targeted households
- a new satellite service to extend access to digital TV
- working with the local community to improve awareness and understanding of switchover
- a labeling scheme to help consumers to easily identify digital ready products, and
- a national call centre and a web site providing switchover information.

The Rudd Government has designed a progressive timetable for digital television switchover starting with Sunraysia in 2010.

"The Government aims to empower the community with the information they require to make the digital television switch.

"We will introduce a labeling scheme to help people identify digital-ready products and services, and we will run an information campaign in the region.

"Switching to digital TV is a straight forward and inexpensive task for the vast majority of Australians; however we understand that some viewers may need practical, in-home assistance to make the move to digital.

"That is why the Government will provide an assistance package to households in the Mildura licence area where at least one resident is a recipient of the full Aged Pension, Disability Support Pension, Carers' Payment or equivalent payment from the Department of Veterans' Affairs."

The pilot switchover package also includes the establishment of a new satellite service, which, with the cooperation of broadcasters, will extend viewer access to digital TV throughout the Mildura licence area.

"Some Australians live in areas where the broadcasters have not built transmitters or the terrain prevents signals reaching them, but this is no reason for them to be denied access to TV," Senator Conroy said.

Senator Conroy said the Digital Switchover Taskforce will work closely with the broadcasters, retailers and antenna installers in the Mildura area to drive digital TV take-up by consumers.

The lessons learned from the switchover in Mildura will help to inform the approach to the broader digital switchover around the country.

"Digital switchover is important for all Australians as it not only provides access to better picture and sound quality, and additional channels, but it will also free-up spectrum which can be used for the delivery of new and improved broadcasting and communications services," Senator Conroy said.

Source: Media release dated: 29 January 2009

source: www.regionaltvmarketing.com.au

With the announcement last week of a \$4.7bn Federal Government infrastructure spending programme, following hot on the heels of \$10.1bn in cash hand outs hitting consumers' banks I thought it may be interesting to see if the distribution of this government largesse favours the 36% of the population living in regional Australia and whether it will be spent?

The short answer is yes and yes.

- Regional households will receive 44% of the total hand out of \$1000 per child*
- 39% of the hand out for retirees (\$1000 per single or \$2100 per couple) will go to regional consumers

** Source Roy Morgan Asteroid Sept 2008 – Children living in households with income up to \$100K p.a. and people 65+ live alone or with partner.*

This is because the demographic profile of regional households skews strongly towards the two primary beneficiaries –average income larger families and retirees.

But will regional consumers respond to the PM's exhortation to "Go out and spend". Here we are helped by the latest findings from Charlie Nelson's foreseechange survey which ran in late November (2008) shortly before these hand outs were due to arrive. The survey found 26% of regional consumers agreed they are more willing to spend than save or repay debt and this was an increase from the previous survey period in April when 23% agreed. In contrast only 18% of metropolitan consumers agreed they are more willing to spend (down from 24% in April) than save or repay debt.

The other positive finding for regional consumer spending outlook is that 38% agree saving is preferred to paying off debt at 35%. Again in contrast, 45% of metro households have had to prioritise debt repayment.

This suggests that up to 64% of the total regional cash hand out will be spent or at least available to spend over the course of next year.

Next the \$4.7bn infrastructure spending programme announced last Friday. This consists of \$1.2bn for railways, \$700m for roads and \$1.6bn for education. The single biggest item is \$1bn for expanding the Hunter Valley coal rail lines (\$580m from Fed. Gov. and \$420m from loans). This is a hugely beneficial project for Newcastle and the national economy as it will massively increase the output potential of coal for export as well as creating many new local jobs.

Until the detail of the other road and rail projects are announced it is impossible to assess what exact share of the rest of the government infrastructure spending will be in regional but clearly with the bulk of the rail and road network outside of the capital cities a significant spending bias to regional is inevitable. So while no-one knows with any certainty what the medium term impact on consumer spending will be of the "GFC" (global financial crisis) there is no question that in relative terms regional consumers will be better placed to follow the Mr Rudd's advice to "Spend, spend, spend".



Arianna Version 8 will be released in 2009, with many new & exciting features to make your lives easier, including...



Event Auto Indexing - Creates a predictive list to help you quickly find the program you're looking (eg. lists all programs beginning with NCIS)



Partial Description Grouping - Allows users to group & report events whose Primary and/or Secondary Description start with the same characters (eg. CSI)



Multi Dynamic Date Selection - Gives you the ability to select more than one dynamic date in a single report



Series and Competition - Top Channels - Organises the competing channels information according to the strongest competitor, from left to right



Export All to Excel - Allows you to export all the analyses / reports included in a Workspace to Excel



First date / Last date variable - For each program reported (and within the date range selected), displays the first and last broadcast date for an event



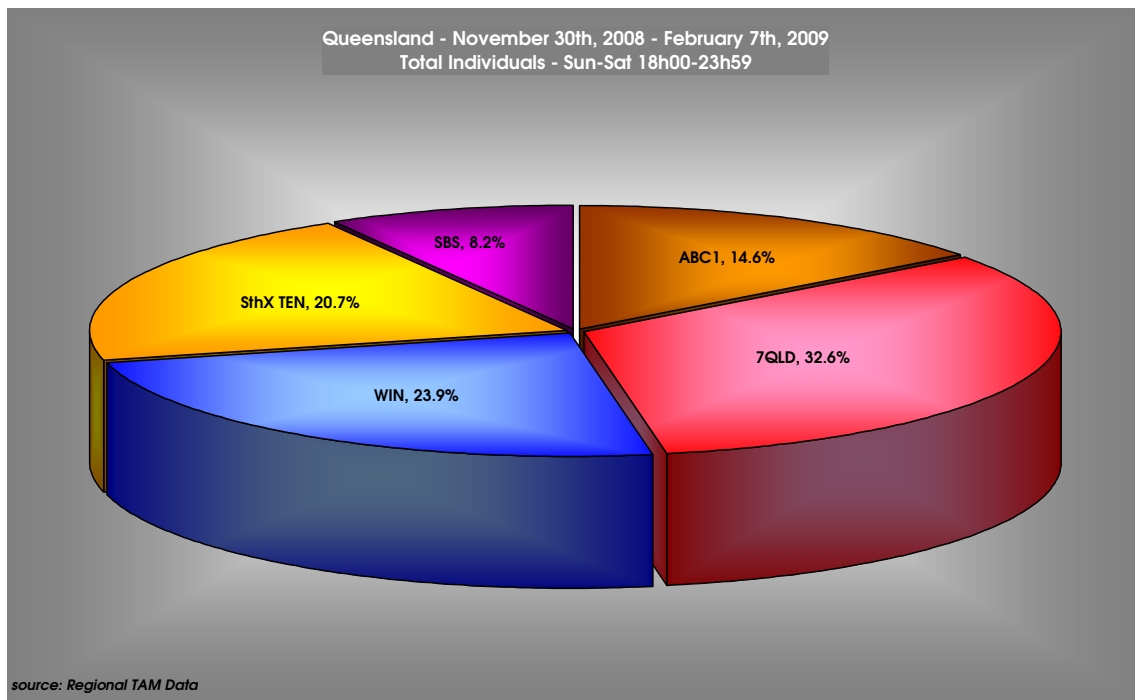
Event Detail - Allows users to drill down & view the details for each event / program broadcast



Auto Fill for Event Finder - Populates the event finder based on the selections made in the parameters page

For further information or to arrange a demonstration please contact your AGB Nielsen Media Research Client Service Representative - (02) 9490 6500 or arianna@agbnielsen.com.au

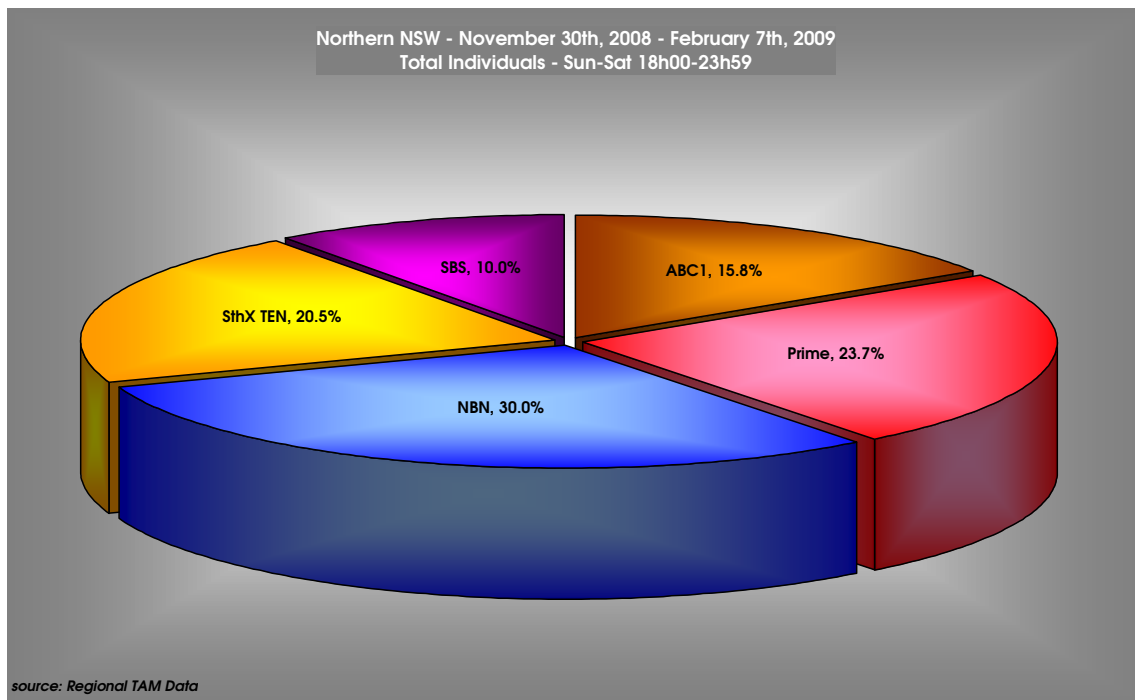
Highlights from Summer Survey period 08/09, from Queensland



Top 20 Ranking programmes from Summer Surveys 08/09

Rank	Description (grouped)	Channel	000s
1	TWENTY/20 MATCH - AUST V SOUTH AFRICA GAME 2	WIN	214
2	2009 AUST OPEN - DAY 9 NIGHT SESSION	7QLD	207
3	2009 AUST OPEN - MEN'S FINAL	7QLD	204
4	TWENTY/20 MATCH - AUSTRALIA V SOUTH AFRICA	WIN	197
5	PACKED TO THE RAFTERS	7QLD	194
6	FIND MY FAMILY	7QLD	189
7	2009 AUST OPEN - MEN'S FINAL INTRODUCTION	7QLD	169
8	BETTER HOMES AND GARDENS	7QLD	167
9	SEVEN NEWS - SUN	7QLD	163
10	NEWS	7QLD	161
11	OUTBACK WILDLIFE RESCUE	7QLD	161
12	RSPCA ANIMAL RESCUE	7QLD	157
13	2009 AUST OPEN - WOMEN'S FINAL	7QLD	156
14	SEVEN NEWS - SAT	7QLD	156
15	NEWS/TT	7QLD	156
16	HOT PROPERTY	7QLD	151
17	1 DAY CRICKET - AUST V SOUTH AFRICA - GAME 1 SESSION 2	WIN	151
18	INSIDE QUEEN MARY 2	7QLD	151
19	IN THE BUSH WITH MALCOLM DOUGLAS	7QLD	150
20	HOME AND AWAY	7QLD	150

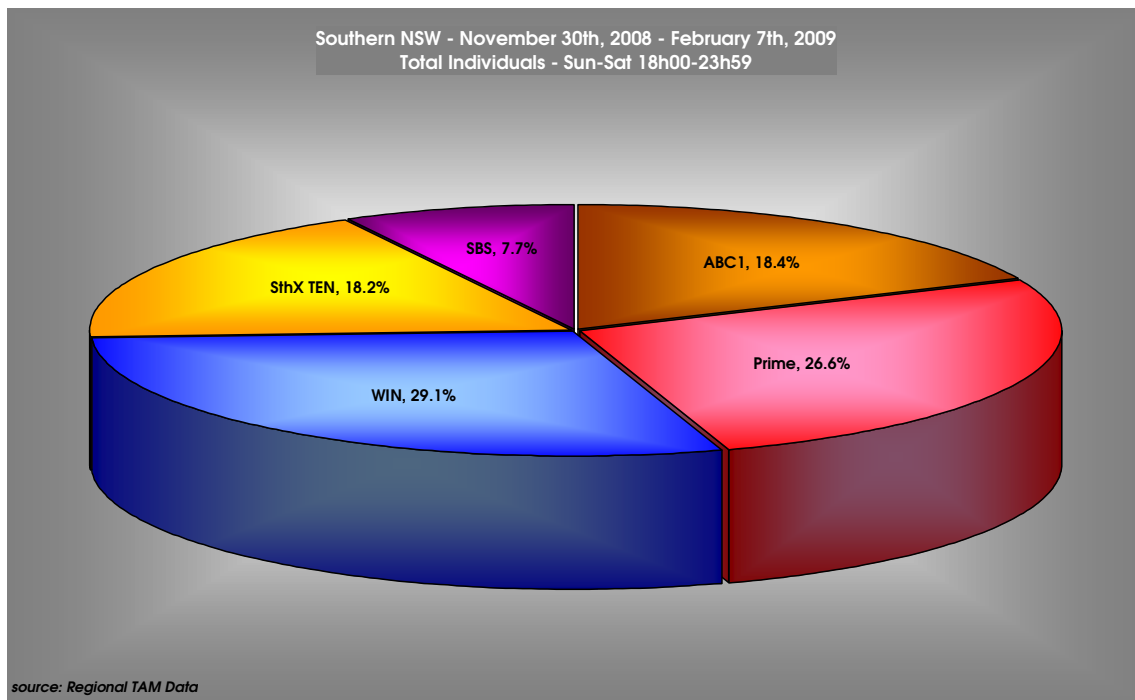
Highlights from Summer Survey period 08/09, from Northern NSW



Top 20 Ranking programmes from Summer Surveys 08/09

Rank	Description (grouped)	Channel	000s
1	PACKED TO THE RAFTERS	Prime	221
2	TWENTY/20 MATCH - AUST V SOUTH AFRICA GAME 2	NBN	196
3	SHREK THE HALLS -RPT	NBN	196
4	2009 AUST OPEN - DAY 9 NIGHT SESSION	Prime	193
5	SNEAK PEEK	NBN	189
6	CAROLS BY CANDLELIGHT	NBN	188
7	FIND MY FAMILY	Prime	184
8	2009 AUST OPEN - MEN'S FINAL	Prime	181
9	TWENTY/20 MATCH - AUSTRALIA V SOUTH AFRICA	NBN	180
10	2009 AUST OPEN - MEN'S FINAL INTRODUCTION	Prime	165
11	RSPCA ANIMAL RESCUE	Prime	153
12	A CURRENT AFFAIR	NBN	153
13	NATIONAL LAMPOON'S CHRISTMAS VACATION -RPT	NBN	149
14	NCIS	SthX TEN	145
15	NATIONAL NEWS SUNDAY	NBN	145
16	THE BIGGEST LOSER (AUS) - LAUNCH	SthX TEN	144
17	LAW AND ORDER: SVU	SthX TEN	141
18	ONE DAY CRICKET - AUST V SOUTH AFRICA - GAME 1 SESSION 2	NBN	140
19	NCIS EP 1 RPT	SthX TEN	140
20	THE CHOPPING BLOCK	NBN	140
21	NATIONAL NEWS SATURDAY	NBN	139

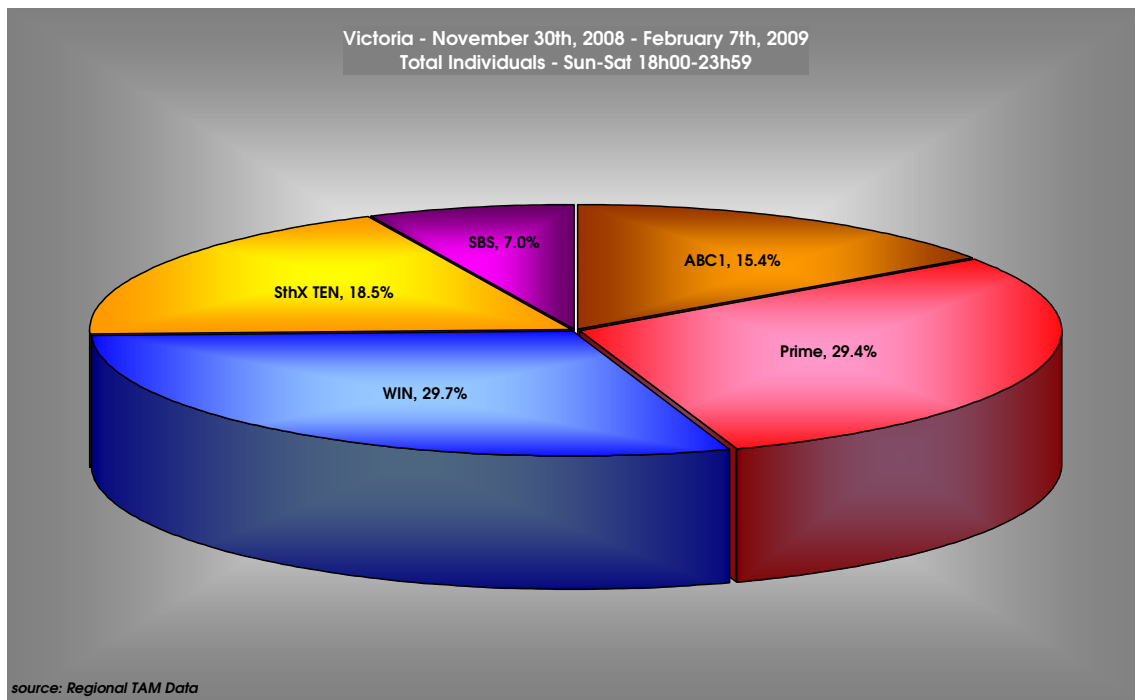
Highlights from Summer Survey period 08/09, from Southern NSW



Top 20 Ranking programmes from Summer Surveys 08/09

Rank	Description (grouped)	Channel	000s
1	TWENTY/20 MATCH - AUST V SOUTH AFRICA GAME 2	WIN	189
2	PACKED TO THE RAFTERS	Prime	172
3	2009 AUST OPEN - DAY 9 NIGHT SESSION	Prime	171
4	2009 AUST OPEN - MEN'S FINAL	Prime	166
5	ONE DAY CRICKET - AUSTRALIA V SOUTH AFRICA - GAME 1 SESSION 2	WIN	163
6	TWENTY/20 MATCH - AUSTRALIA V SOUTH AFRICA	WIN	160
7	FIND MY FAMILY	Prime	157
8	ALL SAINTS	Prime	145
9	SHREK THE HALLS -RPT	WIN	143
10	2009 AUST OPEN - DAY 7 NIGHT SESSION	Prime	141
11	THE HOWARD YEARS-EV	ABC1	135
12	SCHOOLS SPECTACULAR 2008-EV	ABC1	135
13	2009 AUST OPEN - WOMEN'S FINAL PRESENTATION	Prime	134
14	DESPERATE HOUSEWIVES	Prime	132
15	NCIS EP 1 RPT	SthX TEN	132
16	WIN'S SNEAK PEEK	WIN	129
17	2009 AUST OPEN - WOMEN'S FINAL	Prime	125
18	WOOLWORTHS' CAROLS IN THE DOMAIN	Prime	123
19	NCIS	SthX TEN	121
20	A CURRENT AFFAIR	WIN	121

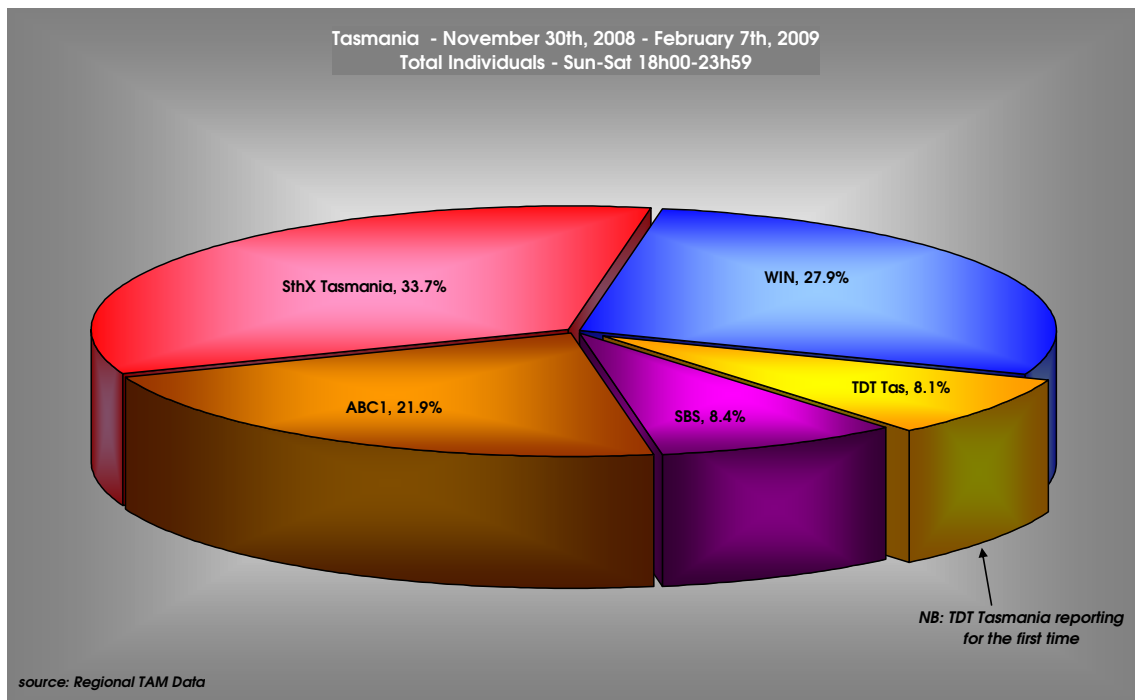
Highlights from Summer Survey period 08/09, from Victoria



Top 20 Ranking programmes from Summer Surveys 08/09

Rank	Description (grouped)	Channel	000s
1	2009 AUST OPEN - DAY 9 NIGHT SESSION	Prime	222
2	TWENTY/20 MATCH - AUST V SOUTH AFRICA GAME 2	WIN	218
3	2009 AUST OPEN - MEN'S FINAL	Prime	215
4	TWENTY/20 MATCH - AUSTRALIA V SOUTH AFRICA	WIN	205
5	PACKED TO THE RAFTERS	Prime	182
6	2009 AUST OPEN - DAY 7 NIGHT SESSION	Prime	180
7	2009 AUST OPEN - WOMEN'S FINAL	Prime	171
8	2009 AUST OPEN - WOMEN'S FINAL PRESENTATION	Prime	164
9	2009 AUST OPEN - DAY 3 NIGHT SESSION	Prime	161
10	FIND MY FAMILY	Prime	161
11	2009 AUST OPEN - DAY 11 NIGHT SESSION	Prime	159
12	ONE DAY CRICKET - AUSTR V SOUTH AFRICA – GAME 1 SESSION 2	WIN	157
13	2009 AUST OPEN - MEN'S FINAL INTRODUCTION	Prime	157
14	RSPCA ANIMAL RESCUE	Prime	145
15	2009 AUST OPEN - WOMEN'S FINAL INTRODUCTION	Prime	145
16	2009 AUST OPEN - DAY 10 NIGHT SESSION	Prime	137
17	SUNDAY NIGHT: SNEAK PEEK	Prime	134
18	ONE DAY CRICKET - AUST V SOUTH AFRICA – GAME 2 SESSION 2	WIN	134
19	ONE DAY CRICKET - AUST V NEW ZEALAND – GAME 2 SESSION 2	WIN	132
20	WIN'S SNEAK PEEK	WIN	129

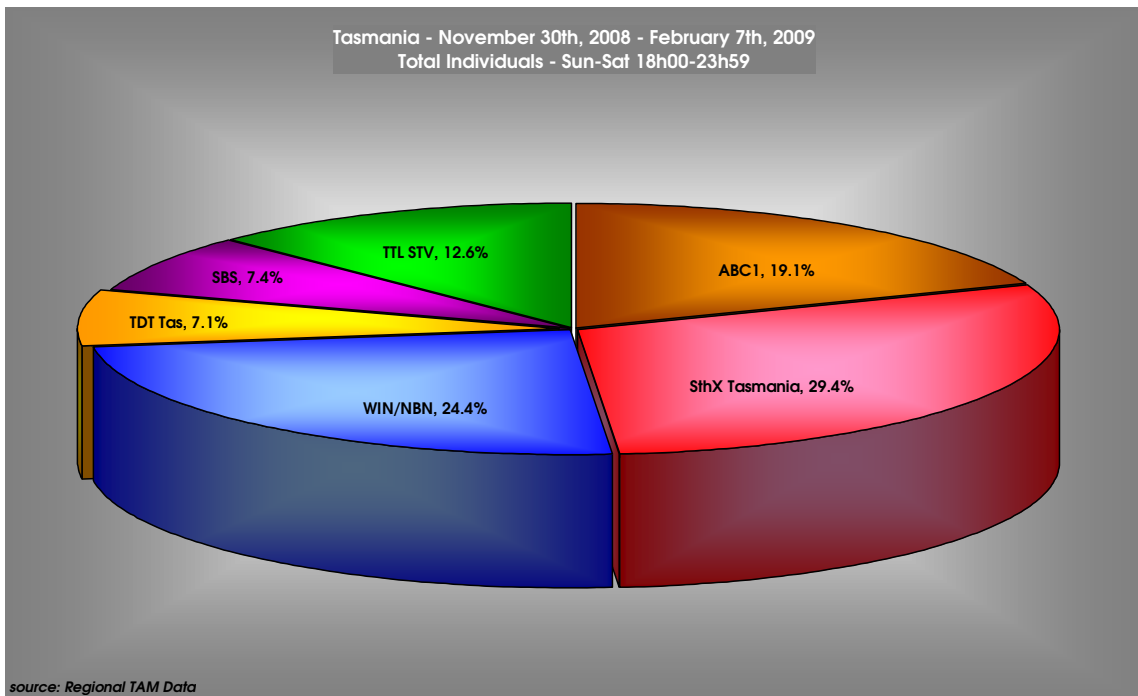
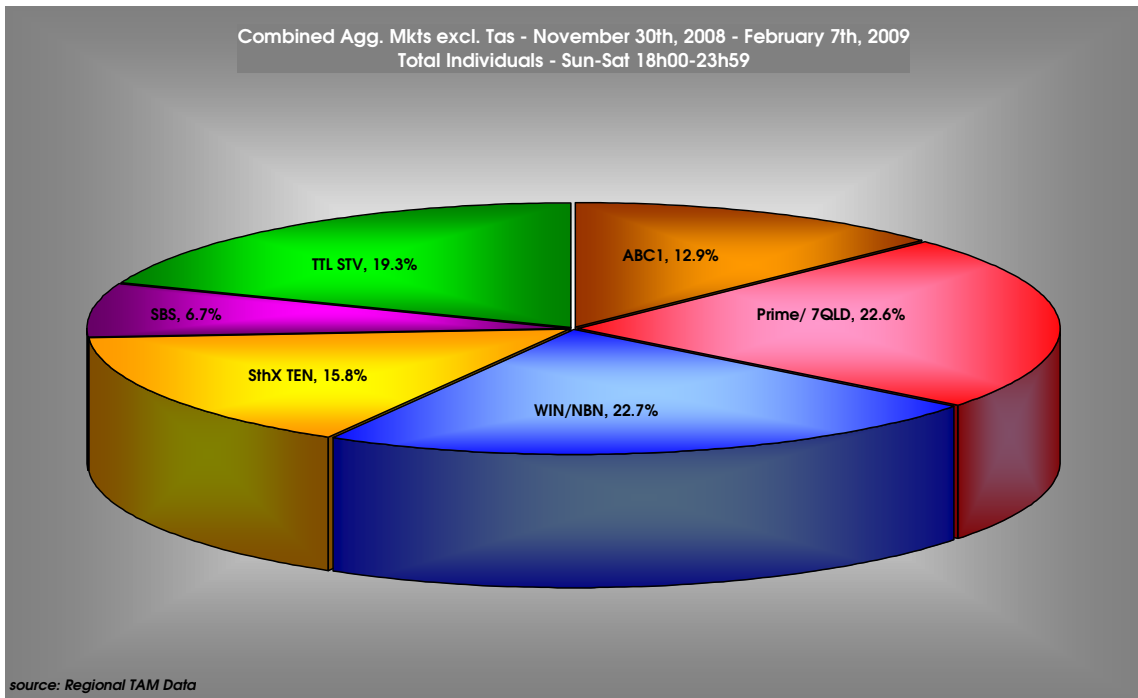
Highlights from Summer Survey period 08/09, from Tasmania



Top 20 Ranking programmes from Summer Surveys 08/09

Rank	Description (grouped)	Channel	000s
1	PACKED TO THE RAFTERS	SthX Tas	86
2	SPICKS AND SPECKS: A VERY SPECKY CHRISTMAS-EV	ABC1	84
3	TWENTY/20 MATCH - AUST V SOUTH AFRICA	WIN	83
4	WIN'S SNEAK PEEK	WIN	81
5	TWENTY/20 MATCH - AUST V SOUTH AFRICA GAME 2	WIN	79
6	ONE DAY CRICKET - AUST V SOUTH AFRICA - GAME 1 SESSION 2	WIN	73
7	HOMES OF TASMANIA	SthX Tas	64
8	BONES	SthX Tas	64
9	THE MEGAFALLS OF IGUACU-EV	ABC1	63
10	ALL SAINTS	SthX Tas	63
11	AUSTRALIAN OPEN 2009 DAY 14, NIGHT MENS FINALS	SthX Tas	63
12	THE SANTA CLAUSE 2	SthX Tas	61
13	NIGHTLY NEWS WEEKDAYS	SthX Tas	60
14	THE OUTDOOR ROOM WITH JAMIE DURIE	SthX Tas	59
15	OUTBACK WILDLIFE RESCUE	SthX Tas	58
16	AIR CRASH INVESTIGATIONS	SthX Tas	58
17	ONE DAY CRICKET - AUST V SOUTH AFRICA - GAME 3 SESSION 2	WIN	57
18	TODAY TONIGHT	SthX Tas	57
19	NEW TRICKS-EV	ABC1	57
20	SHREK THE HALLS -RPT	WIN	57

Highlights from Summer Survey period 08/09, including Subscription TV



TV News from around the Globe: United Kingdom

Rank	Programme	Channel	Total Viewers
1	CORONATION STREET (MON 1933)	ITV1	11,460,000
2	CORONATION STREET (MON 2029)	ITV1	11,390,000
3	EASTENDERS (MON 2000)	BBC1	11,050,000
4	CORONATION STREET (FRI 1934)	ITV1	10,710,000
5	CORONATION STREET (WED 1931)	ITV1	10,700,000
6	CORONATION STREET (FRI 2031)	ITV1	10,550,000
7	EASTENDERS (THU 1929)	BBC1	10,280,000
8	EASTENDERS (FRI 2001)	BBC1	9,500,000
9	DANCING ON ICE (SUN 1851)	ITV1	9,430,000
10	WHITECHAPEL (MON 2100)	ITV1	9,260,000
11	EMMERDALE (MON 1902)	ITV1	8,540,000
12	EMMERDALE (FRI 1902)	ITV1	8,000,000
13	THE NATIONAL LOTTERY - IN IT TO WIN IT (SAT 2000)	BBC1	7,810,000
14	EMMERDALE (WED 1900)	ITV1	7,760,000
15	EASTENDERS (TUE 1930)	BBC1	7,710,000
16	DANCING ON ICE - THE SKATE OFF (SUN 2132)	ITV1	7,690,000
17	WILD AT HEART (SUN 2030)	ITV1	7,690,000
18	EMMERDALE (THU 1901)	ITV1	7,660,000
19	CASUALTY (SAT 2050)	BBC1	7,360,000
20	EMMERDALE (TUE 1859)	ITV1	7,350,000

Source: www.barb.co.uk/ Terrestrial viewing summary - individuals 4+ (including timeshift) - w/e Feb 8, 2009

Snippets:

ITV/C4/Five merge?

ITV, which is expected to report a huge drop in profits when it unveils its annual results for 2008, believes merging the UK's three main commercial broadcasters may be the best way to guarantee its survival.

ITV executives are believed to have outlined the plan to government along with several other options.

Source: www.advanced-television.com

TV News from around the Globe: United States

2008 - 2009 Season Through February 15th, 2009						
Rank	Program Name	Net	Day	Time	Total Viewers	Total no. of Episodes
1	AMERICAN IDOL-WEDNESDAY	FOX	Wed	8:00 PM	27,140,000	5
2	AMERICAN IDOL-TUESDAY	FOX	Tue	8:00 PM	26,779,000	5
3	DANCING WITH THE STARS	ABC	Mon	8:00 PM	19,154,000	10
4	DANCING W/STARS RESULTS	ABC	Tue	9:00 PM	17,423,000	7
5	CSI	CBS	Thu	9:00 PM	18,193,000	16
6	NCIS	CBS	Tue	8:00 PM	17,136,000	19
7	MENTALIST, THE	CBS	Tue	9:00 PM	16,547,000	16
7	NBC SUNDAY NIGHT FOOTBALL	NBC	Sun	8:23 PM	16,835,000	16
9	60 MINUTES	CBS	Sun	7:00 PM	15,263,000	19
9	DESPERATE HOUSEWIVES	ABC	Sun	9:00 PM	15,409,000	15
11	CRIMINAL MINDS	CBS	Wed	9:00 PM	14,466,000	15
12	GREY'S ANATOMY-THU 9PM	ABC	Thu	9:00 PM	13,803,000	17
13	TWO AND A HALF MEN	CBS	Mon	9:00 PM	14,353,000	21
14	CSI: MIAMI	CBS	Mon	10:00 PM	13,262,000	21
15	CSI: NY	CBS	Wed	10:00 PM	12,688,000	16
16	SURVIVOR: TOCANTINS	CBS	Thu	8:00 PM	13,632,000	1
17	WITHOUT A TRACE	CBS	Tue	10:00 PM	12,124,000	16
18	SURVIVOR: GABON	CBS	Thu	8:00 PM	12,914,000	11
19	COLD CASE	CBS	Sun	VAR	11,746,000	16
19	LIE TO ME	FOX	Wed	9:00 PM	12,535,000	3

Source: Zapa2it.com

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Snippets:

4.3 million households awaiting DTV coupons

According to the National Telecommunications & Information Administration (NTIA), its DTV coupon programme still does not have sufficient funding to clear the backlog of request coupons.

It is estimated that there are up to 4.3 million requests awaiting to receive DTV coupons. However, funding for these coupons cannot become available until previously issued coupons that are as of yet unredeemed expire.

An additional \$650 million has been approved by the Administration for the coupon programme.

The NTIA has stated plans to prioritize coupon requests for households that only rely on the analogue terrestrial platform for their primary television services.

Source: www.digitag.org