

WISE Australia

Summer '07/'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.

In this issue:

Regional TV Marketing	
<i>Regional markets a safe haven in uncertain times</i>	2
New channels for Regional STV database	4
Who was watching what over Summer?	
<i>Generational viewing by programme genre over Summer</i>	5
Highlights from the Summer non-Survey period – FTA	11
Highlights from the Summer non-Survey period – STV	16
From the Minister	
Closure of its CDMA mobile network.	17
From ACMA	
Review of digital television codes and standards	18
TV News from around the Globe	
US	19
UK	23
NZ	28



Regional markets a safe haven in uncertain times

Regional markets will be insulated from the worst effects of higher interest rates and expected volatility in consumer spending over the next 12 months.

In fact much of coastal Regional Australia continues to enjoy relative prosperity based on population growth, housing affordability, increasing employment and economic diversity.

Regional TV will therefore be more important than ever for marketers seeking to maximise return on advertising investment as capital city based consumers tighten their belts.

Keys to prosperity

The relative affordability of housing underpins regional prosperity in two ways. Firstly it attracts people to move from the nearby cities driving population growth and secondly ensures that regional residents experience less financial stress when mortgage payments increase.

Population growth of itself is a major driver of economic activity, creating employment, investment in infrastructure and new retail and social amenities. In the past 7 years the total east coast regional population has grown by 10%, a growth rate 35% higher than the capital city average.

Regional QLD had the highest average growth, increasing its population by 17% since 2001 with hot spots such as the Sunshine Coast growing by 25%. Over the same period the NSW regional TV market population grew at more than twice the rate of Sydney with the NSW Northern Rivers sub-market, which includes the Gold Coast, growing by 18%. Demographers expect these trends to continue for the foreseeable future.

Recent data on housing affordability reveals the cost of the average Australian detached house at \$431,751 is 5.5 times the average national household income of \$79,000. As the chart shows the multiple of average income to average house price varies widely across Australia.

House Price vs. Income Multiple

SYD	MEL	BRI	ADE	PER
8	6	5.4	7.5	4.3
REG NSW	REG VIC	REG QLD	REG WA	REG SA
4.6	3.4	4.7	5.1	2.9

Matusik Property Insights, RPD Data & ATO June 2007

Regional residents' average incomes are generally no more than 10% lower than those of capital city residents. The opportunity to buy a home while earning an average income is a compelling reason to move beyond the capital cities.

Affordability is only part of the decision when choosing where to buy a home. Comparisons between environment, lifestyle, school, amenities, travel time and security come into play. For many young families seeking to build a life for the future a regional coastal town will continue to be a very attractive option.

Another reason why rising interest rates will have less impact on regional consumer spending is that only 44% of regional home owners have a mortgage over their home whereas in the capital cities just over half of home owners (51%) have mortgages to pay.

The recent data on high value discretionary spending supports the positive outlook for regional TV markets. Regional consumers have not significantly slowed their spending year on year and have higher rates of purchase than consumers living in the capital cities in many key categories.

Regional Consumers Continue To Spend

P18+: Items Brought Past 12 Months	Regional		Metro	
	Dec 07	YOY Change	Dec 07	YOY Change
White goods	23%	N/C	22%	-1%
New car	5.4%	N/C	5.7%	N/C
Property	9%	+1%	8%	N/C
Plasma TV	12%	+5%	15%	+4%
Digital Set Top Box	10%	+1%	8%	N/C
\$5000+ Renovations	13%	N/C	12%	-0.5%

Roy Morgan Dec 2007 & Dec 2006

Impact of the Boomers

Migrating Baby Boomers (currently aged between 47 and 62) are an immense asset to current and future regional economic prosperity due to their high level of disposable income and most importantly their willingness or perhaps determination to spend.

Recent increases in regional sales of premium brands and services from cars to coffee to cosmetics are directly attributable to seachanging Baby Boomers who want the best of city convenience and luxury to compliment their new coastal life.

As the Baby Boomer population continues to grow so too will the importance or regional markets which are already home to over 40% of Australians over 50.

In summary regional consumer spending over the next 12 to 18 months in both mass market and premium sectors is likely to remain stable.

New channels for Regional STV database

There was a breakout of 6 new channels in the most recent Regional STV database on the configuration released on February 24th.

These new channels are:



We welcome them to the Regional TAM service

Who was watching what over Summer?

In this issue we present a summary of the viewing trends, by Generation, of the programming genres over the Summer survey period.

For each Generation, the reader will be able to see the percentage of time allocated to that Genre of programming compared directly to percentage of viewing by each Generation.

For any new readers, AGBNMR uses 15 year age-breaks as the segment constructor and they are grouped as follows:

- ◇ **Pioneers** (people aged 62years+)
- ◇ **Baby Boomers** (people aged 47-61yrs)
- ◇ **Generation X** (people aged 32-46yrs)
- ◇ **Generation Y** (people aged 17-31yrs)
- ◇ **Generation Z** (people aged 2-16 yrs)

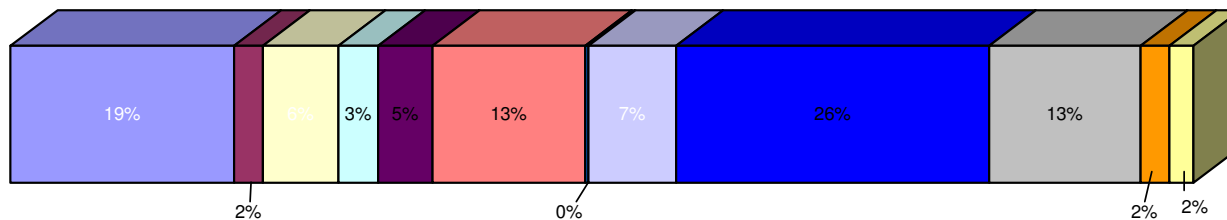
The two most obvious observations we can make is that although "Sports" only contributes 13% of transmission, it is the clear preference for Pioneers (36% of their viewing profile), Baby Boomers (29%), Generation X (24%) and Generation Y (22%).

With the "Children's programs" genre, programming counts for 19% of transmission, but for Generation Z, it drew 45% of their viewing.

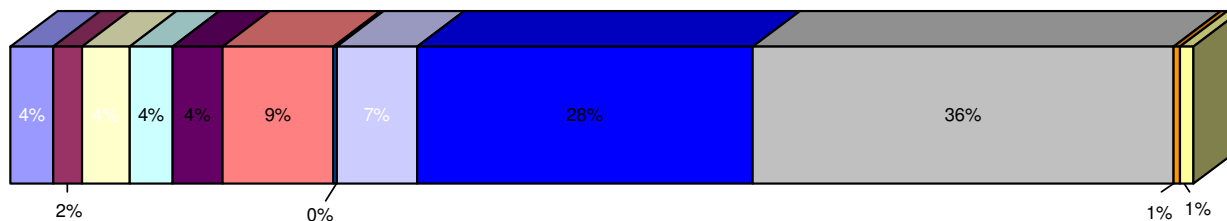
There are other, subtle variations between programme genre transmission and Generation, so we hope you find the following perspective of interest

Pioneers - (people aged 62yrs+)
Total Aggregated Markets Viewing by Genre - Summer period

Broadcast Share



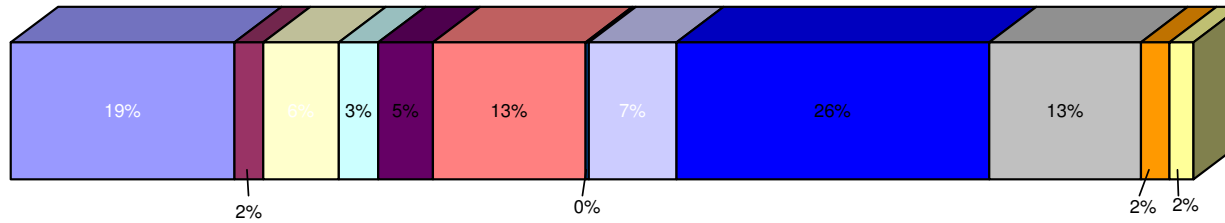
Viewing Time Share



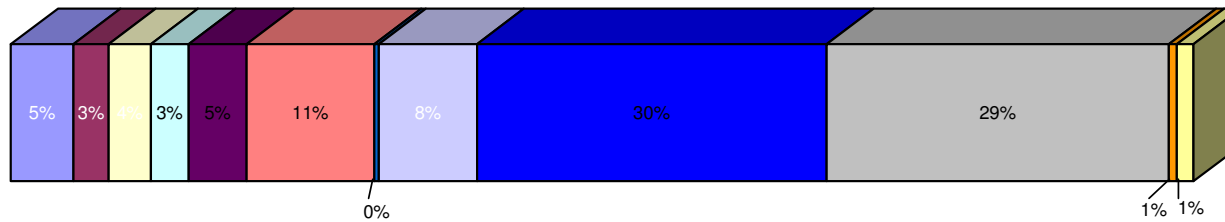
- | | | | | | |
|---------------------|---------------------|------------------------|--------|--------------------------|---------------------|
| Children's programs | Comedy | Cultural / Documentary | Drama | Infotainment / Lifestyle | Light Entertainment |
| Reality | Movies / Miniseries | News/Current Affairs | Sports | Info | Other |

Baby Boomers - (people aged 47-61yrs)
Total Aggregated Markets Viewing by Genre - Summer period

Broadcast Share



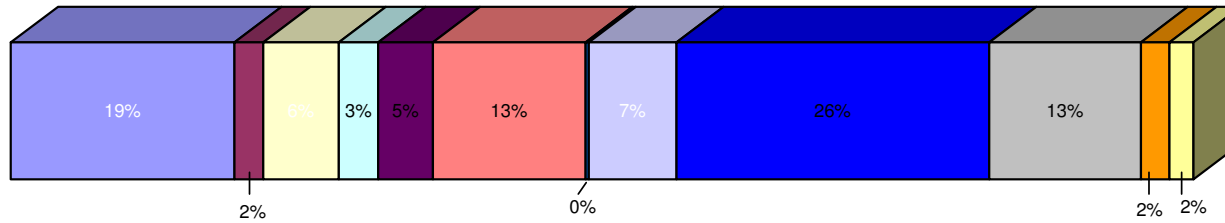
Viewing Time Share



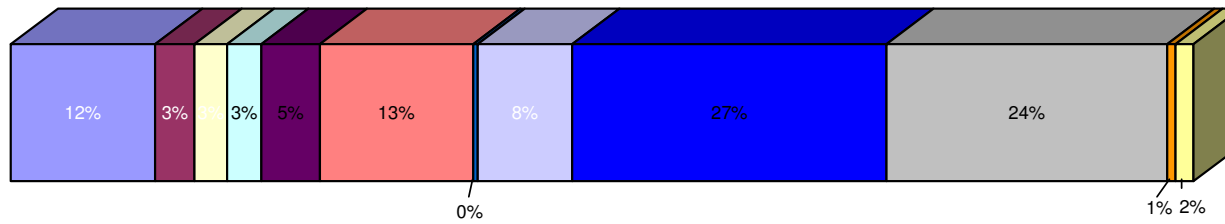
- | | | | | | |
|---------------------|---------------------|------------------------|--------|--------------------------|---------------------|
| Children's programs | Comedy | Cultural / Documentary | Drama | Infotainment / Lifestyle | Light Entertainment |
| Reality | Movies / Miniseries | News/Current Affairs | Sports | Info | Other |

Generation X - (people aged 32-46yrs)
Total Aggregated Markets Viewing by Genre - Summer period

Broadcast Share



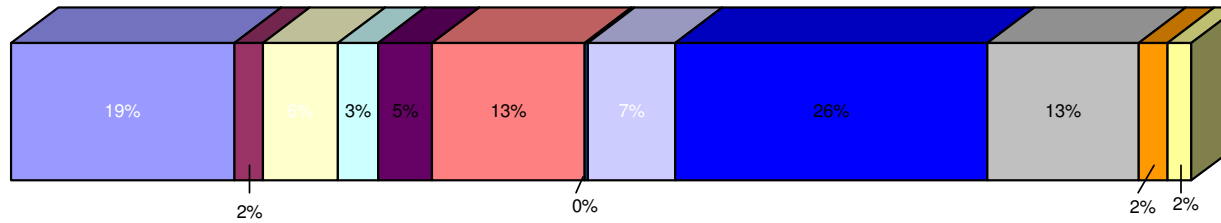
Viewing Time Share



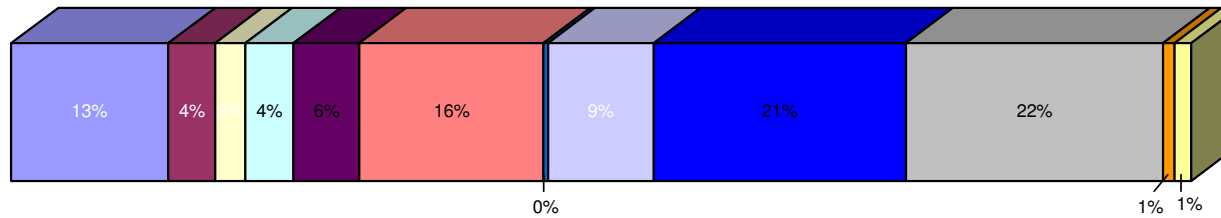
- | | | | | | |
|---------------------|---------------------|------------------------|--------|--------------------------|---------------------|
| Children's programs | Comedy | Cultural / Documentary | Drama | Infotainment / Lifestyle | Light Entertainment |
| Reality | Movies / Miniseries | News/Current Affairs | Sports | Info | Other |

Generation Y - (people aged 17-31 yrs)
Total Aggregated Markets Viewing by Genre - Summer Period

Broadcast Share



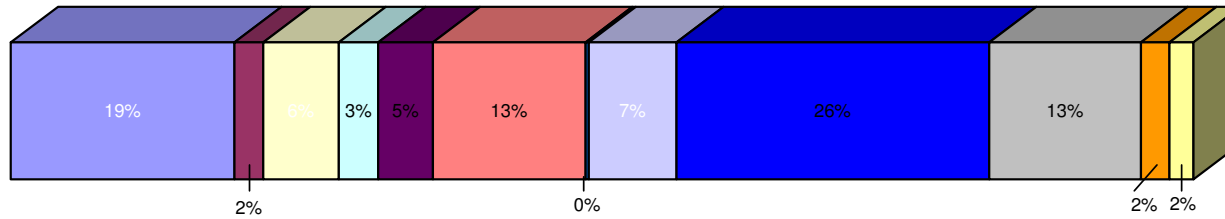
Viewing Time Share



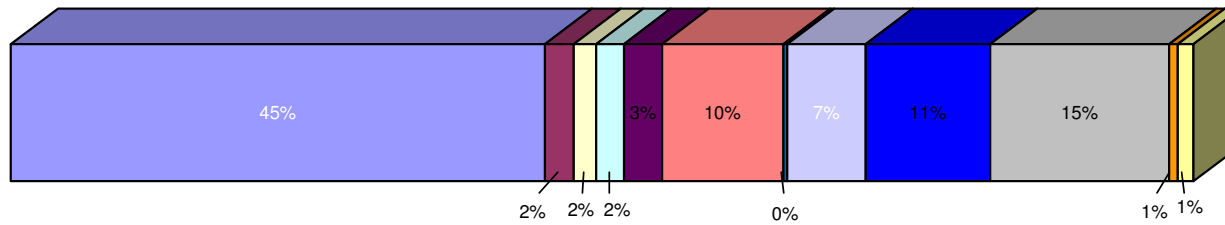
- | | | | | | |
|---------------------|---------------------|------------------------|--------|--------------------------|---------------------|
| Children's programs | Comedy | Cultural / Documentary | Drama | Infotainment / Lifestyle | Light Entertainment |
| Reality | Movies / Miniseries | News/Current Affairs | Sports | Info | Other |

Generation Z - (people aged 2-16yrs)
Total Aggregated Markets Viewing by Genre - Summer period

Broadcast Share

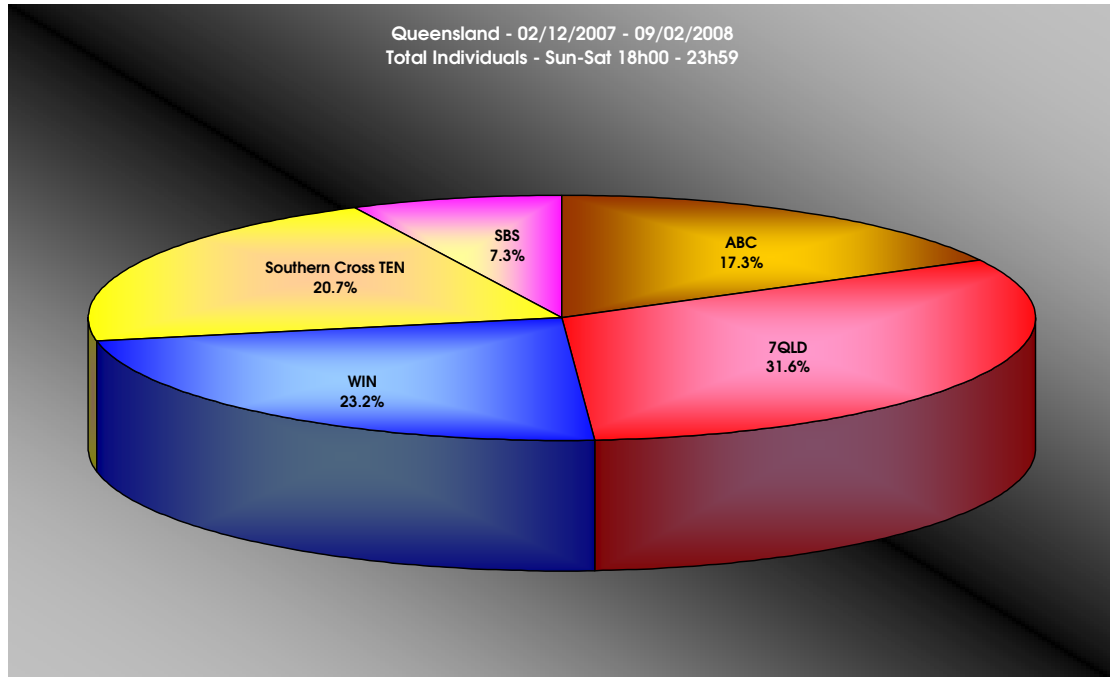


Viewing Time Share



- | | | | | | |
|---------------------|---------------------|------------------------|--------|--------------------------|---------------------|
| Children's programs | Comedy | Cultural / Documentary | Drama | Infotainment / Lifestyle | Light Entertainment |
| Reality | Movies / Miniseries | News/Current Affairs | Sports | Info | Other |

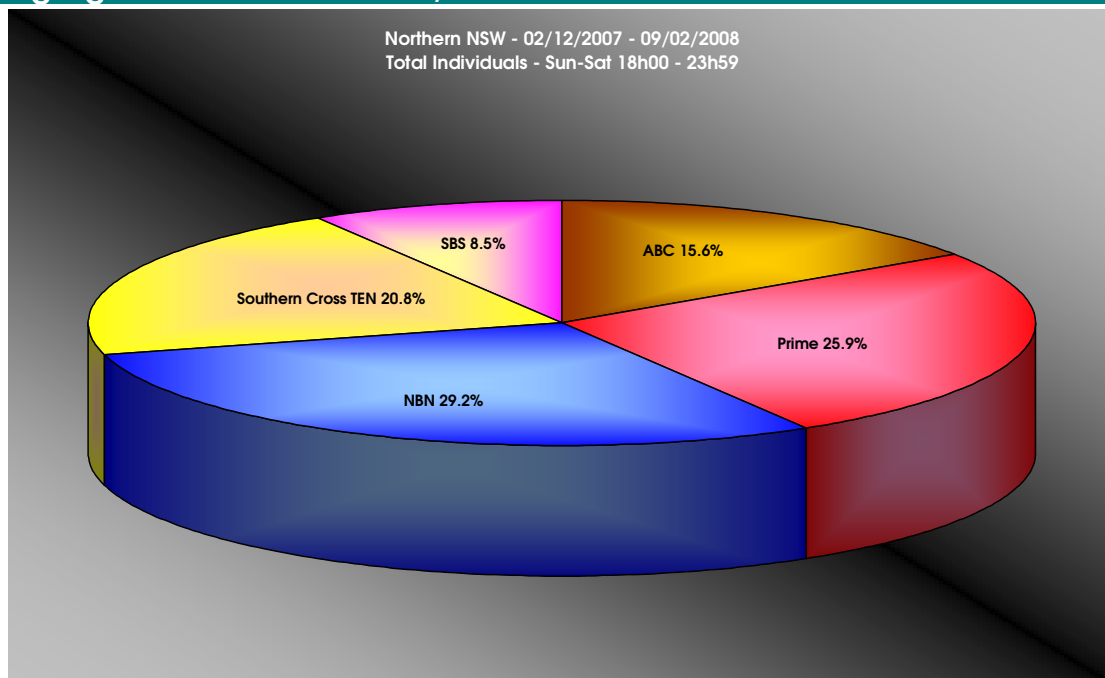
Highlights from Summer 2007/08 from Queensland



Top 20 Ranking programmes from Summer 2007/08

Rank	Description (grouped)	Channel	'000s
1	SEVEN'S TENNIS: 2008 AUST OPEN - MEN'S FINAL	7QLD	237
2	TWENTY/20 MATCH - AUSTRALIA V INDIA	WIN	188
3	SEVEN'S TENNIS: 2008 AUST OPEN - MEN'S FINAL PRESENTATION	7QLD	180
4	THE ZOO	7QLD	173
5	SURF PATROL	7QLD	171
6	TWENTY/20 MATCH - AUSTRALIA V NEW ZEALAND	WIN	165
7	BORDERLINE	7QLD	164
8	SEVEN NEWS	7QLD	163
9	THE BONEYARD	7QLD	162
10	NEWS	7QLD	162
11	SAMANTHA WHO?	7QLD	160
12	SO YOU THINK YOU CAN DANCE AUSTRALIA - AUDITION 1	Sth Cross TEN	159
13	SO YOU THINK YOU CAN DANCE AUSTRALIA - AUDITION 2	Sth Cross TEN	159
14	SEVEN NEWS - SUN	7QLD	159
15	ONE DAY CRICKET - AUSTRALIA V SRI LANKA - GAME 3 SESSION 2	WIN	157
16	SO YOU THINK YOU CAN DANCE AUSTRALIA - AUDITION 3	Sth Cross TEN	156
17	NEWS/TT	7QLD	156
18	BUSH DOCTORS	7QLD	155
19	SPICKS AND SPECKS: A VERY SPECKY CHRISTMAS-EV	ABC	153
20	SEVEN'S TENNIS: 2008 AUST OPEN - DAY 6 NIGHT SESSION	Prime/ 7QLD	152

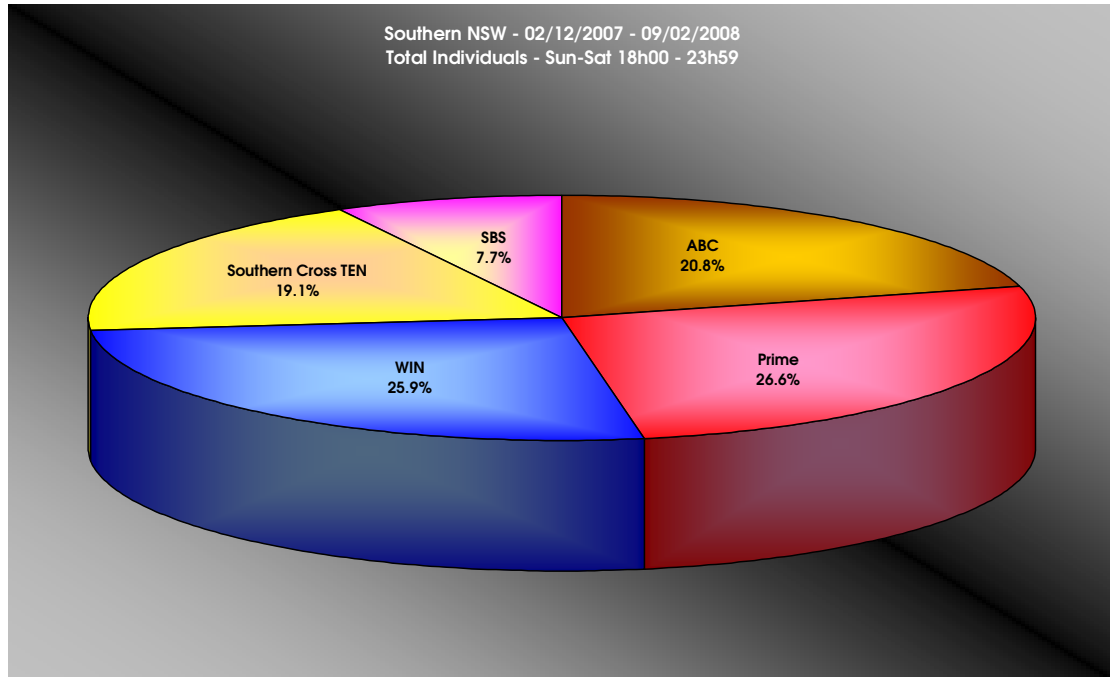
Highlights from Summer 2007/08 from Northern NSW



Top 20 Ranking programmes from Summer 2007/08

Rank	Description (grouped)	Channel	'000s
1	TWENTY/20 MATCH - AUSTRALIA V INDIA	NBN	254
2	SEVEN'S TENNIS: 2008 AUST OPEN - MEN'S FINAL	Prime	234
3	TWENTY/20 MATCH - AUSTRALIA V NEW ZEALAND	NBN	214
4	BONDI RESCUE	Sth Cross TEN	203
5	SURF PATROL	Prime	193
6	SO YOU THINK YOU CAN DANCE AUSTRALIA - AUDITION 1	Sth Cross TEN	186
7	A CURRENT AFFAIR	NBN	183
8	20 TO 1 -RPT	NBN	183
9	SO YOU THINK YOU CAN DANCE AUSTRALIA - AUDITION 2	Sth Cross TEN	173
10	SEVEN'S TENNIS: 2008 AUST OPEN - MEN'S FINAL PRESENTATION	Prime 7QLD	173
11	NURSES	NBN	169
12	SPICKS AND SPECKS: A VERY SPECKY CHRISTMAS-EV	ABC	169
13	NATIONAL NEWS SUNDAY	NBN	168
14	THE ZOO	Prime	165
15	BUSH DOCTORS	Prime	164
16	CAROLS BY CANDLELIGHT	NBN	163
17	SO YOU THINK YOU CAN DANCE AUSTRALIA - AUDITION 3	Sth Cross TEN	162
18	VICAR OF DIBLEY-EV	ABC	161
19	SEVEN'S TENNIS: 2008 AUST OPEN - DAY 7 NIGHT SESSION	Prime	160
20	2007 CAROLS IN THE DOMAIN	Prime	160

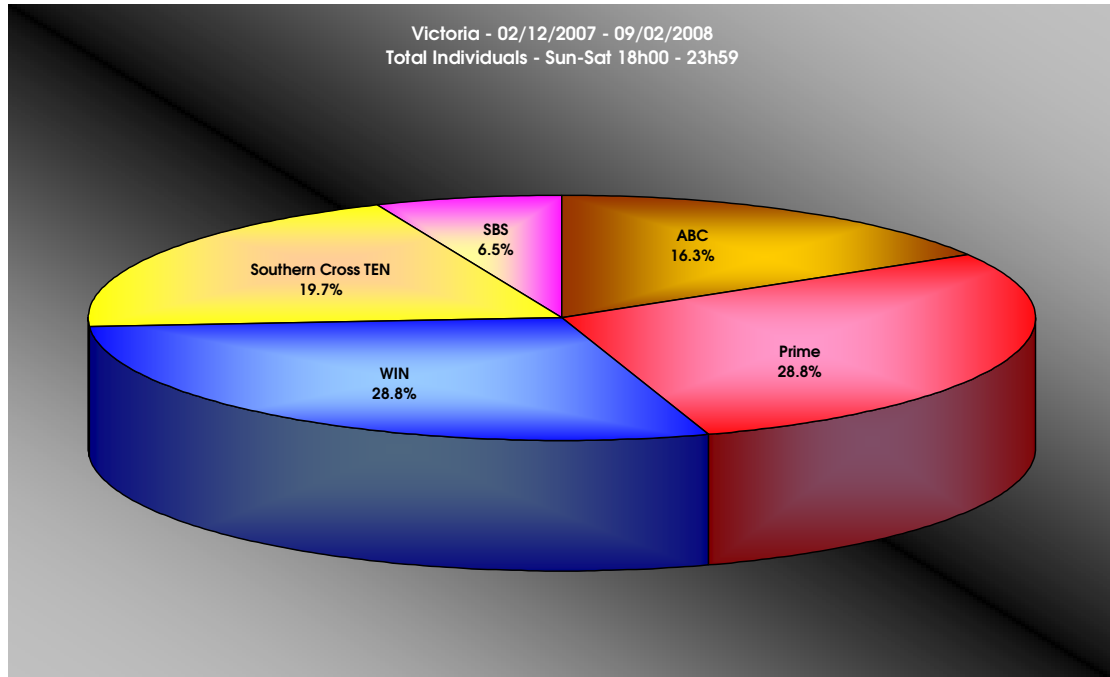
Highlights from Summer 2007/08 from Southern NSW



Top 20 Ranking programmes Summer 2007/08

TV Item	Description (grouped)	Channel	'000s
1	SEVEN'S TENNIS:2008 AUST OPEN-MEN'S FINAL	Prime	253
2	SEVEN'S TENNIS:2008 AUST OPEN-MEN'S FINAL PRESENTATION	Prime	216
3	THE CHASER'S WAR ON 2007-EV	ABC	172
4	VICAR OF DIBLEY-EV	ABC	170
5	SEVEN'S TENNIS: 2008 AUST OPEN - DAY 8 NIGHT SESSION	Prime	167
6	TWENTY/20 MATCH - AUSTRALIA V NEW ZEALAND	WIN	159
7	SPICKS AND SPECKS: A VERY SPECKY CHRISTMAS-EV	ABC	158
8	TWENTY/20 MATCH - AUSTRALIA V INDIA	WIN	152
9	SEVEN'S TENNIS: 2008 AUST OPEN - DAY 7 NIGHT SESSION	Prime	136
10	BONDI RESCUE	Sth Cross TEN	136
11	SEVEN'S TENNIS: 2008 AUST OPEN - DAY 6 NIGHT SESSION	Prime	134
12	SEVEN'S TENNIS: 2008 AUST OPEN - DAY 12 NIGHT SESSION	Prime	133
13	M-THE SANTA CLAUSE 2	Prime	132
14	M-ELOISE AT CHRISTMASTIME	Prime	132
15	ONE DAY CRICKET - AUSTRALIA V SRI LANKA - GAME 3 SESSION 2	WIN	131
16	SURF PATROL	Prime	131
17	20 TO 1 -RPT	WIN	131
18	DOC MARTIN RPT	ABC	127
19	SEVEN'S TENNIS: 2008 AUST OPEN - DAY 10 NIGHT SESSION	Prime	126
20	ONE DAY CRICKET - AUSTRALIA V INDIA - GAME 1 SESSION 1	WIN	125

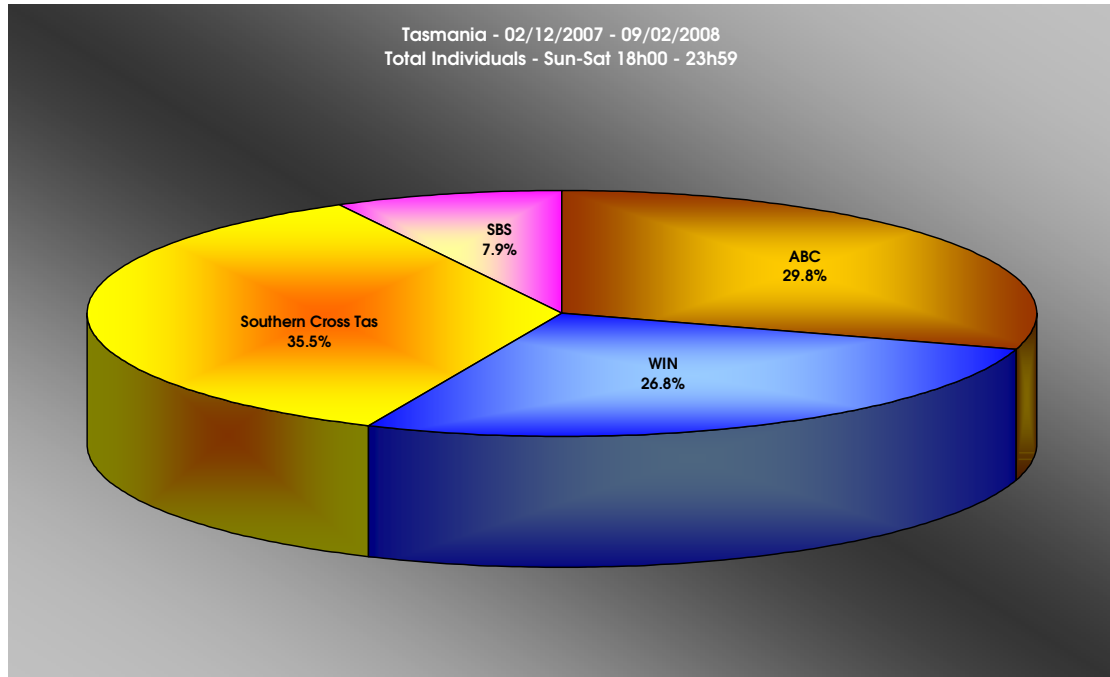
Highlights from Summer 2007/08 from Victoria



Top 20 Ranking programmes Summer 2007/08

Rank	Description (grouped)	Channel	'000s
1	SEVEN'S TENNIS: 2008 AUST OPEN - MEN'S FINAL	Prime	257
2	SEVEN'S TENNIS: 2008 AUST OPEN - MEN'S FINAL PRESENTATION	Prime	224
3	TWENTY/20 MATCH - AUSTRALIA V INDIA	WIN	216
4	SEVEN'S TENNIS: 2008 AUST OPEN - DAY 8 NIGHT SESSION	Prime	204
5	CAROLS BY CANDLELIGHT	WIN	203
6	SEVEN'S TENNIS: 2008 AUST OPEN - DAY 7 NIGHT SESSION	Prime	185
7	TWENTY/20 MATCH - AUSTRALIA V NEW ZEALAND	WIN	171
8	SEVEN'S TENNIS: 2008 AUST OPEN - DAY 6 NIGHT SESSION	Prime	162
9	SEVEN'S TENNIS: 2008 AUST OPEN - DAY 12 NIGHT SESSION	Prime	158
10	SHREK THE HALLS	WIN	153
11	SEVEN'S TENNIS: 2008 AUST OPEN - DAY 10 NIGHT SESSION	Prime	153
12	SEVEN'S TENNIS: 2008 AUST OPEN - DAY 5 NIGHT SESSION	Prime	148
13	ONE DAY CRICKET - AUSTRALIA V SRI LANKA - GAME 3 SESSION 2	WIN	147
14	SEVEN'S TENNIS: 2008 AUST OPEN - DAY 11 NIGHT SESSION	Prime	143
15	SEVEN'S TENNIS: 2008 AUST OPEN - DAY 9 NIGHT SESSION	Prime	142
16	SPICKS AND SPECKS: A VERY SPECKY CHRISTMAS-EV	ABC	141
17	SEVEN'S TENNIS: 2008 AUST OPEN - DAY 2 NIGHT SESSION	Prime	135
18	ONE DAY CRICKET - AUSTRALIA V INDIA - GAME 1 SESSION 2	WIN	132
19	SURF PATROL	Prime	131
20	A CURRENT AFFAIR	WIN	131

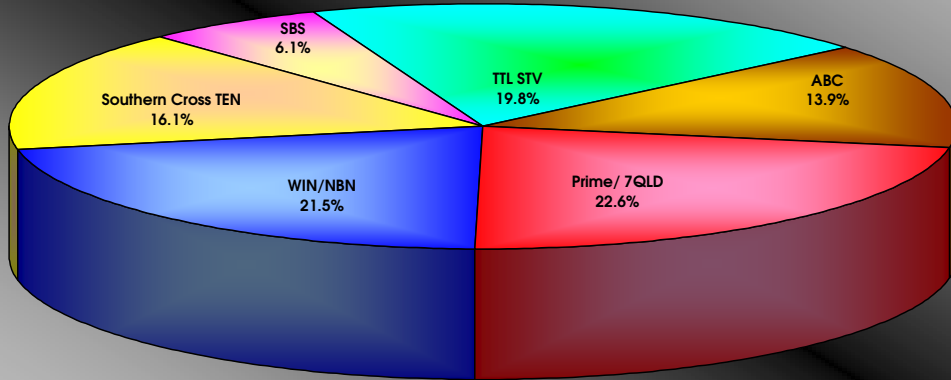
Highlights from Summer 2007/08 from Tasmania



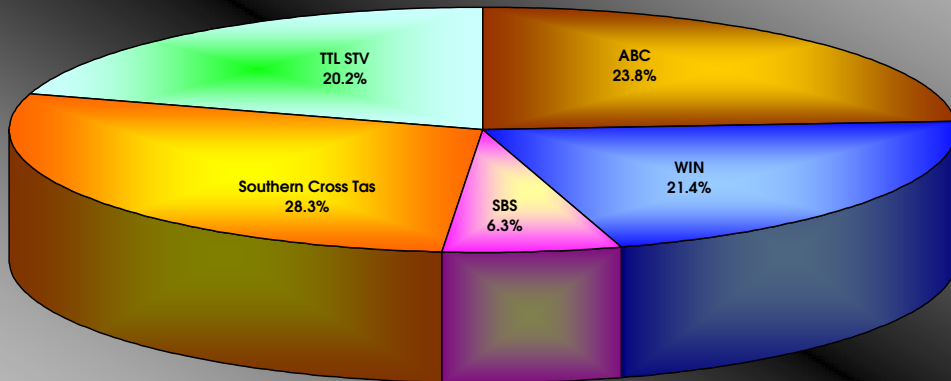
Top 20 Ranking programmes Summer 2007/08

Rank	Description (grouped)	Channel	'000s
1	VICAR OF DIBLEY-EV	ABC	90
2	KATH AND KIM	Southern Cross Tas	89
3	ROBIN HOOD-EV	ABC	83
4	SPICKS AND SPECKS: A VERY SPECKY CHRISTMAS-EV	ABC	83
5	TWENTY/20 MATCH - AUSTRALIA V INDIA	WIN	77
6	AGATHA CHRISTIE'S MISS MARPLE: NEMESIS-EV	ABC	76
7	ELOISE AT CHRISTMAS TIME	Southern Cross Tas	74
8	THE SANTA CLAUSE 2	Southern Cross Tas	73
9	THE CHASER'S WAR ON 2007-EV	ABC	72
10	NIGHTLY NEWS WEEKDAYS	Southern Cross Tas	71
11	KALAHARI: THE FLOODED DESERT-EV	ABC	71
12	HOME AND AWAY	Southern Cross Tas	70
13	JANE EYRE-EV	ABC	69
14	LIKE FATHER LIKE SON-EV	ABC	69
15	ABC NEWS-EV	ABC	68
16	BORDER SECURITY - AUSTRALIA'S FRONT LINE	Southern Cross Tas	68
17	DOC MARTIN RPT	ABC	67
18	SPICKS AND SPECKS-EV	ABC	66
19	OPERATUNITY OZ: REVISITED-EV	ABC	66
20	ABC NEWS-SU	ABC	65

Combined Agg. Mkts excl. Tas - 02/12/2007 - 09/02/2008
Total Individuals - Sun-Sat 18h00 - 23h59



Tasmania - 02/12/2007 - 09/02/2008
Total Individuals - Sun-Sat 18h00 - 23h59



From the Minister:

Government and Telstra announce measures to enable CDMA network closure
The Minister for Broadband, Communications and the Digital Economy, Senator Stephen Conroy, today released details of measures that Telstra will take to allow the closure of its CDMA mobile network.

Release of Telstra's proposed rectification plan will provide further confidence for CDMA users migrating to the Next G network.

"Telstra is working towards the deadline of 28 April to turn off the CDMA network and consumers should act on the basis that it will be switched off," Senator Conroy said. "This is subject to me receiving a report that comprehensively addresses my concerns."

"It has been agreed that Telstra will undertake a number of actions to ensure equivalence of coverage and retail service and enable the closure of the CDMA network. Telstra agreed to a number of these actions being independently verified," Senator Conroy said.

On 18 January, Senator Conroy notified Telstra that he was not in a position to declare equivalence between the Next G and CDMA networks. A number of issues were identified that Telstra was asked to address, including:

- * taking all reasonable steps to ensure Next G customers have appropriate handsets for their coverage needs
- * providing appropriate advice to customers purchasing Next G handsets and accessories
- * ensuring telemetry and CDMA Wireless Local Loop customers have access to necessary Next G equipment and are given an appropriate time to migrate and ensuring there is sufficient equipment available to enable all CDMA customers to migrate to the Next G network.

"I want to congratulate Telstra for the work it has done to date, to ensure these issues are addressed," Senator Conroy said.

"Telstra is operating the 1800 888 888 hotline that customers can call with handset coverage issues, and receive a handset exchange in genuine cases of non-equivalent coverage at no financial penalty."

"Telstra is implementing an accreditation program to equip sales staff and stores with the information and equipment to enable consumers to purchase handsets and accessories that are appropriate for their needs."

"Telstra is also working to ensure CDMA wireless local loop and telemetry customers are given every opportunity to migrate to the new network."

"Telstra has agreed that a major audit firm will independently verify that it has met its commitments in relation to the 1800 888 888 hotline and accreditation program," Senator Conroy said.

"There will be independent verification that Next G telemetry modems and modules are available and an independent survey of Next G Wireless Link customers will be conducted."

"In addition to this, the Australian Communications and Media Authority has agreed to verify Telstra's engineering data, demonstrating that it has addressed a small number of coverage issues that were identified in its report, which is available on my Department's website."

Telstra's rectification plan is available on the Department of Broadband, Communications and the Digital Economy's website, www.dbcde.gov.au

Released: Monday 25 February 2008

From ACMA:

ACMA recently called for comments on the development of digital television codes and standards .

The Australian Communications and Media Authority sought the views of interested parties on how ACMA and the industry should approach the development of codes and standards for digital television.

'We encourage industry participants to share their views with ACMA, particularly about how it should approach the making of mandatory requirements in the digital television area,' said Chris Chapman, ACMA Chairman.

Amendments to the Broadcasting Services Act 1992 have introduced new provisions allowing ACMA to determine technical standards for the transmission and reception of digital television to assist in minimising the impact on consumers of the transition to new types of services and equipment. ACMA may also register industry codes and develop industry standards if no code is developed or a registered code proves deficient.

ACMA has released a discussion paper that seeks views on a number of specific issues, including which organisation(s) would have the relevant expertise, representation and level of interest to participate in the development of codes and technical standards for digital terrestrial television broadcasting;

Matters that may be dealt with by industry codes and standards include:

- o labelling domestic TV reception equipment;
- o electronic program guides;
- o the numbering of digital services, including logical channel numbers;
- o application program interfaces;
- o conditional access systems; and
- o updating software in domestic reception equipment.
- o Submissions will assist ACMA in the identification and assessment of issues requiring further consideration. ACMA is particularly interested in codes or standards which would drive the take-up of digital television services in Australia.

Details of how submissions were to be positioned are in the discussion paper, "Digital Television – codes and standards" available on the ACMA website.

ACMA received 13 submissions and, subject to any consideration of confidentiality claims, these are available for review from

http://www.acma.gov.au/WEB/STANDARD/pc=PC_310890#submissions

1. Australian Broadcasting Corporation
2. Australian Digital Suppliers Industry Forum (ADSIF)
3. Australian Federation Against Copyright Theft (AFACT)
4. Australian Subscription Television and Radio Association (ASTRA)
5. Broadcast Australia
6. CHOICE
7. FreeTV Australia
8. Media Access Australia
9. Modern Antenna Systems
10. Standards Australia
11. Mr Alan Hughes
12. Mr Shane Moore
13. Mr Jeremy Pritchard

TV News from around the Globe: United States

Season-to-Date by Viewers 2007 - 2008 Season Through March 9, 2008

Rank	Program Name	Net	Day	Time	Total Viewers	Total Episodes
1	AMERICAN IDOL	FOX	Tue	8:00 PM	30,712,000	8
2	AMERICAN IDOL	FOX	Wed	8:00 PM	28,881,000	8
3	DANCING W/THE STARS	ABC	Mon	8:00 PM	21,672,000	10
4	DANCING W/STARS RESULT	ABC	Tue	9:00 PM	19,565,000	9
5	DESPERATE HOUSEWIVES	ABC	Sun	9:00 PM	18,933,000	11
6	MOMENT OF TRUTH	FOX	Wed	9:01 PM	17,690,000	5
7	HOUSE	FOX	Tue	9:00 PM	17,643,000	16
8	CSI	CBS	Thu	9:00 PM	16,630,000	23
9	NBC SUNDAY NIGHT FOOTBALL	NBC	Sun	VAR	15,872,000	16
10	GREY'S ANATOMY	ABC	Thu	9:00 PM	15,315,000	17
11	LOST	ABC	Thu	9:00 PM	15,290,000	6
12	SURVIVOR: CHINA	CBS	Thu	8:00 PM	15,183,000	11
13	NCIS	CBS	Tue	8:00 PM	14,762,000	21
14	OPRAH'S BIG GIVE	ABC	Sun	9:00 PM	13,779,000	2
15	DEAL OR NO DEAL-MON	NBC	Mon	VAR	13,778,000	8
16	CSI: MIAMI	CBS	Mon	10:00 PM	13,726,000	20
17	60 MINUTES	CBS	Sun	7:00 PM	13,627,000	23
18	SURVIVOR: MICRONESIA	CBS	Thu	8:00 PM	13,620,000	5
19	EXTREME MAKEOVER:HOME ED.	ABC	Sun	8:00 PM	13,554,000	19
20	NEW AMSTERDAM	FOX	Tue	9:00 PM	13,495,000	1

source: Zap2it.com

© 2005 Nielsen Media Research, Inc. The Information contained herein is the copyrighted property of Nielsen Media Research, Inc. Unauthorized use of this copyrighted material is expressly prohibited. All Rights Reserved.

Snippets:

US Government begins digital TV campaign –

The US government this week launches an all-out offensive to inform and educate the general populace about the digital TV switchover, which will black-out all analog sets in February 2009.

Around 14 million households across the nation are still exclusively connected through antennas rather than cable or satellite, and these viewers must switch to digital within the next twelve months or face the horrors of a TV-less future.

To this end, the Department of Commerce is mailing-out coupons that can be redeemed against digital converters. Each household is entitled to two \$40 (€27; £20.50) vouchers to offset the cost of the government-approved digiboxes.

In addition, the department's National Telecommunications and Information Administration will target elderly, low-income and rural households, disabled viewers and minorities.

US TV networks have set aside airtime to the value of \$1 billion for public-service announcements about the digital transition, while cable operators have offered around \$200m in airtime.

It is likely around 1.4m households in 2008 and 2009 will sign up for cable or satellite services to solve the digital transition issue - doubling annual subscriber growth rates.

Source: *warc.com*

Nielsen Reports DVR Playback Is Adding To TV Viewing Levels

Time-Shifting of Shows is Extending Prime Time to Later in the Evening; DVR Users Comprise Three Distinct Groups Based on How Much They Time-Shift

Las Vegas, NV, February 14, 2008 - Playback from Digital Video Recorders (DVRs) is increasing the amount of time people spend watching television, according to new data from The Nielsen Company. In comparing total television usage (Live viewing plus DVR playback) for persons 18-49 in November, 2007 to total television usage in November, 2005 (before Nielsen measured DVR homes and penetration was very low) Nielsen found that viewing had increased slightly throughout the day, and was three percent higher at 9:00 p.m. and five percent higher between 11:00 p.m. and midnight.

This has implications for primetime viewing levels in the future because as the number of DVR households in the U.S. population grows, DVR prime time viewing levels will likely rise as well.

Nielsen also reported that the traditional prime time period between 8 PM - 11PM was expanding because people are watching the shows they recorded later the same evening. In fact, by creating their own "personal television schedules," viewers are pushing prime time as far back as midnight. Nielsen found that DVR playback peaks at 9 to 10 pm with eleven percent of viewers age 18-49 in DVR homes playing back recorded programming on their DVRs, while between 11:00 p.m. and midnight seven percent of people are playing programming back.

The information was presented today at Nielsen's Client Meeting on Audience Measurement in Las Vegas, Nevada. The event is attended by more than 600 television, online, mobile, advertiser and agency clients from around the world, as well as by senior Nielsen management, including CEO David Calhoun.

"Consumers are increasingly making time-shifted viewing an important part of their overall television experience, and are beginning to change traditional TV models," said Patricia McDonough, Senior Vice President of Insights Analysis and Policy at Nielsen Media Research. "DVR playback has added to TV usage, particularly during the most

watched hours of the day, as viewers take advantage of their ability to watch their favorite shows according to their own schedules."

Providing new insights into time-shifted audiences, Nielsen identified three distinct groups of DVR users based on how much they time-shift:

- Heavy Shifters are primarily middle income women, ages 18-49, who record and later watch nearly 26 hours of television- or about half of their TV viewing - a week. Males, 18-34, are least likely to fall into this group.
- Medium Shifters watch somewhat more television than the average person; and about a third of their viewing is time-shifted.
- Light Shifters, who represent nearly 70% of all persons in DVR households, watch less television than the average viewer. With incomes that exceed \$100,000 and the most prone to own a high definition TV set, they spend only about 10% of their television time with time-shifted programming, watching shows they would otherwise have missed.

Nielsen also reported that time-shifting is not evenly distributed by forms of programs. As would be expected, most viewers prefer to watch news, sports and movies live. On the other hand, general dramas, such as House, Grey's Anatomy and Heroes, are most often recorded and viewed later, and account for one-third of all time-shifted content.

Among other types of programming that is heavily time-shifted are talk shows like Oprah; soap operas like The Young and Restless; and reality television shows such as Survivor, The Biggest Loser and Dancing With the Stars.

Source: nielsenmedia.com

TV News from around the Globe: United Kingdom

Rank	Programme	Channel	Total Viewers
1	CORONATION STREET (MON 1931)	ITV1	11,220,000
2	CORONATION STREET (MON 2028)	ITV1	11,060,000
3	CORONATION STREET (FRI 1934)	ITV1	10,950,000
4	CORONATION STREET (WED 1931)	ITV1	10,610,000
5	EASTENDERS (MON 2000)	BBC1	10,260,000
6	CORONATION STREET (FRI 2029)	ITV1	10,260,000
7	EASTENDERS (THU 1929)	BBC1	9,760,000
8	EASTENDERS (FRI 2000)	BBC1	9,510,000
9	DANCING ON ICE (SUN 1828)	ITV1	9,440,000
10	DANCING ON ICE - THE SKATE OFF (SUN 2031)	ITV1	8,790,000
11	WILD AT HEART (SUN 1933)	ITV1	8,590,000
12	LEWIS (SUN 2103)	ITV1	8,500,000
13	EMMERDALE (MON 1901)	ITV1	8,320,000
14	EMMERDALE (WED 1859)	ITV1	8,160,000
15	EMMERDALE (FRI 1902)	ITV1	8,130,000
16	EMMERDALE (THU 1901)	ITV1	7,720,000
17	CASUALTY (SAT 2009)	BBC1	7,630,000
18	EMMERDALE (TUE 1858)	ITV1	7,410,000
19	ANT AND DEC'S SATURDAY NIGHT TAKEAWAY (SAT 1848)	ITV1	7,290,000
20	EASTENDERS (TUE 1929)	BBC1	7,120,000

Source: www.barb.co.uk/ - "Terrestrial viewing summary Individuals 4+ (Including Timeshift) w/e 02/03/2008"

Snippets:

Ofcom confirms plans to release spectrum suitable for mobile television

Ofcom today confirmed details of plans to auction radio spectrum suitable for a range of services, including mobile television and satellite radio.

Ofcom also announced that the provisional deadline for applications is 10 April 2008, with the online auction likely to start at the end of April.

A number of possible uses of the 1452 - 1492 MHz band, the so-called "L-Band", have been identified including:

- mobile multimedia services including mobile TV which could be deployed using a variety of technologies;
- satellite digital radio; and
- broadband wireless access or high-speed internet on the move.

The release of the spectrum in the 1452 - 1492 MHz band is part of a wider programme to release around 400 MHz of prime spectrum. Other awards in this programme include the digital dividend - the spectrum that will be freed-up through the switch to digital television - and the 2.6 GHz band.

The spectrum, which is available over much of Europe, will be released on a technology and service neutral basis, allowing users the flexibility to decide what technology to use, what services to offer and to change their use of the spectrum over time. All licences will be tradable.

Ofcom's Spectrum Policy Partner, Philip Rutnam said: "Ofcom's fifth award of spectrum in the L-Band is part of the process of ensuring that the UK's valuable spectrum resource is used as efficiently as possible. This spectrum provides an opportunity for citizens and consumers to benefit from new services and greater competition."

Source: http://www.ofcom.org.uk/media/news/2008/03/nr_20080313

New News, Future News

Foreword:

The prospects for television news in a fully digital era are a central element in any consideration of the future of public service broadcasting (PSB).

News is regarded by viewers as the most important of all the PSB genres, and television remains by far the most used source of news for UK citizens. The role of news and information as part of the democratic process is long established, and its status is specifically underpinned in the Communications Act 2003.

Released on late October 2007, this report, *New News, Future News*, is one of a series of Ofcom studies focussing on individual topics identified in the PSB Review of 2004/05, and further discussed in the Digital PSB report of July 2006. The others are on the provision of children's programmes and on the prospects for a Public Service Publisher. All three studies are linked to areas of particular PSB concern for the future, and set out a framework for policy consideration ahead of the next full PSB review. Other Ofcom work of relevance includes the review of Channel 4's funding.

It has not been the role of this report to come up with solutions, and no policy recommendations are put forward. Instead, the report examines the environment in which television news currently operates, and assesses how that may change in future (after digital switch-over and, in 2014, the expiry of current Channel 3 and Channel 5 licences). It identifies particular issues that will need to be addressed and suggests some specific questions that may need to be answered.

The report focuses on television, but sits in the wider context of other media including radio, newspapers and – ever more importantly – the internet. Ofcom's proposals for the Future of Radio are contained in a separate on-going consultation.

In some key areas this report builds on and updates analysis carried out for an earlier study, *New News Old News* - produced in 2002 for the Independent Television Commission and the Broadcasting Standards Commission.

Four particular themes emerge. All four are linked to DSO and other changes taking place in the news environment, but they each present separate challenges and demand separate solutions. Those issues are:

Plurality and diversity in UK national and international news;
The prospects for television news in the UK nations and regions;
Issues of engagement and disengagement with news – particularly for the young and members of some ethnic communities;
The relevance and practicality of requirements for due impartiality in digital news.
The future of news – and television news in particular - is important for all citizens of an informed modern democracy. For this reason, Ofcom invites the views of stakeholders and other interested parties on all aspects of our analysis. Those views will be actively reviewed and considered by Ofcom before any firm policy approaches are established. A summary of all comments received will be published in the autumn of 2007.

Full copies of the report and various extracts are available at the following URL.

Source: <http://www.ofcom.org.uk/research/tv/reports/newnews/>

Britons watch more TV, reports IPA

The Institute of Practitioners in Advertising – the body representing British advertising, media and marketing communications agencies – has released its latest quarterly report on TV viewing, Trends in Television.

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

VOD to generate over US\$10bn by 2012, according to report

A new report from Informa Telecoms & Media forecasts that by 2012, 909mn homes will have access to true video-on-demand (VOD) or near-video-on-demand (NVOD) technology, representing 78% of the world's TV homes and generating revenues in excess of US\$10bn.

The report, entitled "On-Demand TV & PVRs", projects that North America and Europe will account for a combined 83% of global on-demand revenues by 2012, with North America out front holding a share of close to 50%. Last year, North America accounted for 56% of global VOD revenues but just 25% of worldwide VOD/NVOD users. The report forecasts that the Asia Pacific region will account for over half of on-demand homes by 2012 but take under 12% of global revenues.

Global on-demand revenue forecasts by region :

Revenues (US\$ million)	2007	2012
Europe	1,559	3,305
North America	2,684	5,047
Rest of the World	533	1,747
Total	4,776	10,099

Source: Informa Telecoms & Media

In Europe, the UK is the leading country for on-demand and is predicted to generate \$677mn in 2012, with France and Germany some way behind in second and third places respectively. The Informa research adds that operators are continuing to demonstrate the importance of on-demand services by the fact that they are making ongoing investments in expensive upgrades to their networks in preparation for widespread on-demand activity.

"While true VOD operators still use a free-content model to promote high customer awareness of the technology, there are now signs that these services are successfully converting users into revenue-generators," said Adam Thomas, author of the report. "This is often at the expense of NVOD services, which are either being phased out, or reduced in size."

Source: iptv-news.com

Obstacles ahead for the online ads

In 2008, online advertising will be challenged, the living room will increase its contribution to the carbon footprint, and Internet TV will drive the growth for traditional TV viewing, according to Deloitte's technology, media, and telecommunications industry (TMT) leader Damien Tampling.

Deloitte's recently released Media Predictions -- Trends 2008 highlights that the \$US42 billion online advertising industry is likely to face a number of obstacles in 2008. A key barrier will be a lack of standard measurement and a growing antipathy to the online advertisement as a key global trend. Other obstacles include an increase in regulatory scrutiny and increasing competitiveness from traditional media.

The report recommended that the advertising sector may need to be more aggressive in the promotion of the benefits of online advertising in 2008. It should communicate the fair exchange that Internet ads offer to end-users, for example with free content. The sector should also monitor regulation carefully. The more successful online advertising gets, the more subject to regulatory scrutiny it will become. The sector will also face rising competitiveness from traditional media.

Tambling commented that in Australia there are no broadly accepted standards for the measurement of the effectiveness of online advertisements. "This is beginning to cause issues as more and more organisations advertise online and want to compare ROI across different channels, Web sites, time periods, and territories," he said.

"Though the need today may well be for media organisations to create and sell cross-media advertising packages, an inability to provide consolidated and accurate results on the impact of campaigns across multiple channels will still come into play," he added.

Despite forecasts of the imminent demise of television, the report predicted that in 2008 the sector should remain in overall good health throughout the year.

The report highlighted that Internet television would in all likelihood contribute to traditional television's fortunes. This outcome may appear perverse, particularly when Internet television has been regarded by some influential commentators as a direct competitor to traditional television. The report points out that Internet television is another medium whose quality, set of content formats and audience differs largely from those of traditional television.

"Traditional broadcasters need to work out how online channels can complement or supplement broadcast content, rather than cannibalise it," said Tambling. "And they must do so with an offering that is made up of more than just previews, out-takes, and news."

Source: computerworld.com.au

TVNZ-New Zealand to launch second digital channel

Six months after launching its first digital channel TVNZ 6, TVNZ-New Zealand will soon launch its second digital channel.

Advertising-free digital channel TVNZ 7 will launch on 30 March 2008 with an event and live broadcast from parliament.

TVNZ 7 will be New Zealand's first local free-to-air factual channel. It will screen a broad range of news, current affairs, documentary and commentary shows.

TVNZ Chief Executive Officer Rick Ellis said that TVNZ 7 will have a distinctive New Zealand flavour.

"We want TVNZ 7 to be a place where New Zealanders come to be informed and to form their views on the issues of the day. We want TVNZ 7 to be a place that expresses the diversity of perspectives in New Zealand today.

"Around 70 percent of the channel's content will be locally produced, and around 40 percent of that will be programming made specifically for TVNZ 7. News will make up 30 percent of the schedule."

TVNZ launched its first digital channel, TVNZ 6, on 30 September 2007.

Source: *abu.org*