



# WISE Australia

Winter '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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**Regional new car sales prove strength of consumer spending**

The record number of new cars sold last year in regional markets looks like it will be surpassed in 2008 with sales up 2% for the six months to end June.

Underpinning the demand for new cars is the growth in regional population and the change to an urbanized lifestyle. In addition increasing fuel prices and growing sensitivity about environmental issues have accelerated the shift to smaller cars.

A long term trend in regional Australia is the growing preference for luxury vehicles. This reflects the influence of Baby Boomers (born 1946-1964) on car buying. The average age of a new car buyer in Australia is now 48. Advertisers not actively targeting regional markets where up to 40% of this demographic live could be overlooking a big opportunity.

SUV's continue to replace medium and large cars as regional consumers look to reflect contemporary lifestyle choices and bigger family size. The value of regional buyers to the SUV sector is highlighted by Holden selling 4 out of every 10 Captiva SUV's to regional buyers.

Segment	Metro	Regional	Reg Share of National Sales
Light < \$25k	+5%	+7%	30%
Small < \$40k	+6%	+3%	30%
Medium < \$60k	-6%	-5%	28%
Large < \$80k	-13%	-24%	27%
Premium/lux	+9%	+13%	16%
SUV	+12%	+15%	35%

Source: VFACTs

**Rural recovery boosts regional sales**

The highest growth regional markets for total new car sales so far this year were Regional Victoria (+6%) and the rural "Diary" TV markets (+5.8%) which comprise Reg. WA, South Australia and outback QLD and NSW. Luxury vehicles are now the fastest growing segments in rural and outback Australia providing further evidence of the impact of the resources boom on consumer spending and confirmation of the recovery in the farming sector. Medium size luxury cars (BMW 3 Series and Mercedes C-Class) increased sales in TV Diary markets this year by 73%, more than double the national rate of growth. Luxury SUV sales

(Lexus 330 & BMW X5) grew in TV Diary markets by 31%, more than three times the national rate of growth.

Free to Air TV is a more dominant medium in remote and rural Australia as radio, magazines and newspapers attract less audience share than in the rest of Australia.

There are two broadcast networks in each Diary market so audience share of individual TV programmes is higher than average.

This unique media landscape gives advertisers a great opportunity to ensure maximum reach against a large population base in a cost efficient manner.

### **Imported brands winning new buyers**

The five fastest growing car makes in regional markets this year are all imported premium brands.

Audi and VW have both doubled their sales in regional Australia since 2005 as high growth urban areas in SE QLD and Coastal NSW draw in affluent consumers from surrounding cities.

<b>Fastest growing brands YOY</b>		
	<b>Metro</b>	<b>Regional</b>
1 Land Rover	+50%	+92%
2 Jeep	+7%	+41%
3 Audi	+35%	+24%
4 Volkswagen	+18%	+22%
5 Mercedes-Benz	+14%	+21%

Source: VFACTS

The new Mercedes C-Class has been a huge success in regional markets, up 230% year on year, with regional buyers accounting for 20% of all sales.

Regional TV was a major component of the C-Class launch campaign and was clearly effective in delivering awareness to the affluent Boomers that typically buy the brand.

### **Positive outlook for 2009**

The fundamentals for strong regional consumer spending remain in place for the year ahead. High population growth will continue, especially in SE QLD and coastal NSW, driving housing and retail activity. The scale of the resources boom in QLD, SA and WA is only just starting to be understood and will underpin both the national and regional economies for the next 20 years. The rural sector is enjoying strong demand and high commodity prices in most markets. Regional housing while increasing in price remains relatively affordable and means families will be able to maintain spending on discretionary purchases like cars, appliances and holidays.

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

**Legislation and research to advance digital TV switchover**

The Minister for Broadband, Communications and the Digital Economy, Senator Stephen Conroy, announced milestones in Australia's Digital television revolution.

A Bill allowing a rolling switchover has been introduced to Parliament and research programs vital to the free-to-air digital TV transition are now underway.

"The Rudd Government is getting on with the job of the digital TV switchover. This Bill and research arrangements will allow us to meet our commitment in a sensible, considered way," Senator Conroy said.

The Broadcasting Legislation (Digital Television Switchover) Bill 2008 will ensure that a phased approach to turning the analog signal off is completed in 2013.

"The Government is now able to set a flexible, region-by-region timetable for analog signal turn-off taking into account local market circumstances and community feedback," Senator Conroy said.

The Minister has announced a \$4.8 million contract for Newspoll to launch the Digital Tracker research program. Reporting quarterly, it will provide vital information on regional switchover trends, which can be used by the broadcast industry, retailers and antenna installers.

Executive Director of the Governments Digital Switchover Taskforce, Andy Townend, said the Digital Tracker is designed to provide long-term, large-scale research into awareness and understanding of the digital TV switchover.

"This research tool will provide the Taskforce with insights into digital conversion rates, intention to convert and public feedback so we can ensure the national campaign to inform the community is effective," Mr Townend said.

A \$1 million technical survey to assist with the special digital TV reception issues for some flats, apartments and townhouses, known as Multi-Dwelling Units, is also now underway. It is being conducted by Australian Digital Testing.

"We will survey six hundred sites across the nation to provide estimates of the cost and time-frames needed to rectify problems within different sizes and types of buildings so we can provide timely and practical information to the public," Mr Townend said.

The Taskforce is calling for expressions of interest from relevant parties to have their buildings included in the project. Expressions of interest can be sent to [housing@digitalswitchover.gov.au](mailto:housing@digitalswitchover.gov.au)

### **ACMA Review of the Children’s Television Standards**

Free TV Australia notes the release of the Australian Communications & Media Authority’s (ACMA) Review of the Children’s Television Standards (CTS).

“The report is the result of a comprehensive review and consultation by the ACMA,” said Julie Flynn, CEO of Free TV Australia. “Free TV welcomes moves by the ACMA to provide more flexibility in scheduling children’s programs”.

The ACMA’s review also determined that bans on the advertising of food to children are not warranted.

“It is encouraging that the ACMA has taken an evidence-based approach to considering the issue of food and beverage advertising to children. The evidence clearly does not support a regulatory approach which includes banning advertising,” said Ms Flynn.

“The ACMA report makes other recommendations in relation to the regulation of food and beverage advertising which we will give careful consideration”.

“Free TV will actively participate in the next phase of the review.”

### **Networks Unite To Launch Healthy Lifestyle Campaign**

In a campaign worth several million dollars, Free TV broadcasters have joined with prominent Australian sports stars to urge young Australians to adopt a healthy lifestyle.

Olympic medalists Grant Hackett and Giaan Rooney as well as AFL Brownlow medalist Michael Voss are spearheading the “Live Life” campaign promoting healthy eating and drinking habits. The campaign will run on all metropolitan and regional commercial television networks over the next few months.

Grant and Michael use their own experiences to talk about the need to eat a balanced diet with “lots of fruit and vegetables” and to keep active. Giaan is aiming her message at the need to drink responsibly and in moderation.

“We are very pleased that these three prominent Australians have given their time voluntarily to help deliver these important messages,” said Free TV Chairman, Wayne Goss.

“There has been a great deal of public concern and debate about these two important issues and their impact on all Australians, particularly young Australians,” Goss said.

“We are confident that this initiative will help to raise awareness of these issues in a positive and direct way.”

The “Live Life” campaign comprises three 30 second television commercials and began airing nationally on Sunday, 13 July.

**ACMA finds Toowoomba community radio service breached licence conditions**

The Australian Communications and Media Authority has found that the licensee of community radio station 4DDB Toowoomba breached the conditions of its licence that prohibit the broadcasting of advertisements and the broadcasting of sponsorship announcements that run in excess of five minutes per hour. ACMA has also found that the licensee has operated the service as part of a profit-making enterprise.

Under the Broadcasting Services Act 1992 (BSA), sponsorship announcements on community radio which do not include appropriate acknowledgements of financial support ('tags') are considered to be advertisements and so fall within the prohibition. The Authority found that the licensee failed to include tags in relation to numerous pre-recorded announcements for financial sponsors and two live cross-over chats.

Where they are appropriately tagged, the BSA allocates a time limit of five minutes per hour for the broadcast of sponsorship announcements. The Authority found that on three occasions the licensee broadcast sponsorship announcements that ran in excess of this time limit.

This is 4DDB's second breach of these licence conditions this year.

Community broadcasters must not operate their services for profit or as part of a profit-making enterprise. While ACMA is satisfied that 4DDB is not operating for profit, it has found that the terms of 4DDB's commercial agreement with a third party are such that its service has been contributing to the generation of income for this organisation. In practice, this means that the service was an integral part of a profit-making enterprise operated by the third party. As such, 4DDB's service has been operated 'as part of' a profit-making enterprise in breach of the licence condition.

In light of these serious breaches of its licence conditions, ACMA will now move to pursue compliance measures addressing the potential for future breaches of the relevant licence conditions. ACMA will be writing to the licensee of 4DDB, Darling Downs Broadcasting Society Inc, shortly about the proposed compliance actions, details of which will be announced when finalised.

ACMA's investigation followed complaints that 4DDB was broadcasting advertisements and sponsorship announcements in excess of the five minute per hour limit and that the service was operating for profit. The complainants also alleged that the service was failing to represent its community interest in line with its licence conditions. However, ACMA's investigation found that the licensee was meeting the requirements of the community interest licence condition.

Darling Downs Broadcasting Society Inc holds a community broadcasting licence to provide a radio service in the Toowoomba RA1 licence area, which includes the local government areas of Toowoomba, Cambooya, Crows Nest, Gatton, Jondaryan, Pittsworth and Rosalie in Queensland.

### **ACMA cancels Perth community TV licence**

The Australian Communications and Media Authority has cancelled the community television licence for Perth held by ACCESS 31. ACCESS 31 ceased broadcasting on 6 August 2008.

'The loss of Perth's community television service is a disappointing outcome,' said Chris Chapman, ACMA Chairman. 'The decision to cancel the licence was not taken lightly.

'ACMA is charged with promoting the availability of a diverse range of television services throughout Australia, as well as ensuring that broadcasters meet all their statutory obligations. ACMA reached its decision after considerable deliberations and taking into account both these objectives,' Mr Chapman said.

'ACMA will now move quickly to ensure the Perth community can once again have access to a community television service,' he said.

A number of interested parties have contacted ACMA and/or the liquidator with a view to providing a community television service for Perth. ACMA will shortly invite applications to conduct a two year trial community television service for Perth.

Community broadcasting licences are subject to the condition that the licensee provides a service or services for community purposes. On 18 September 2008, ACMA found that Channel 31 Educational Community Television Ltd, licensee of ACCESS 31, breached this licence condition as it was no longer providing a service for the Perth community.

ACCESS 31 ceased broadcasting at 5.00 pm on Wednesday 6 August 2008. A meeting of members of the licensee held on 1 September 2008 voted to wind-up the company voluntarily and appointed Mr Kim Holbrook as liquidator.

Under the Broadcasting Services Act 1992 (the Act), ACMA may suspend the licence, for a period up to three months, or cancel the licence if the licensee breaches a condition of the licence. ACMA decided to cancel ACCESS 31's licence with effect from 18 September 2008.



## Technology Update

In response to requests from our regular readers, we are pleased to include an extract of the latest Establishment Survey, previously included last year for the first time.

These tables demonstrate the pace of change to the repertoire of equipment within the viewing households of the Regional TAM markets.

The latest table compares quarter 2 data from the 6 years of Regional TAM data collection.

In summary:

- 30% of houses have 3 or more working TV sets, with 12% having 4 or more.
- DVD players (including those with DVDR) have now surpassed VCR technology as the preferred method of entertainment.
- More than one third of households have 2 or more DVD players/recorders.
- The old technology of VCR continues to drift downwards, now standing at 70%.
- Three quarters of households have PC's in their houses, with Internet access rising to 67%. That 10%-12% gap between owning a PC and connectivity to the Internet has been evident since the ES began.
- PCTV card penetration has risen steadily to 9%.

Technology	Q2 2003	Q2 2004	Q2 2005	Q2 2006	Q2 2007	Q2 2008
0 TV	1%	1%	1%	1%	1%	1%
3+ Working TV	24%	27%	28%	30%	29%	30%
4+ Working TV	7%	9%	10%	10%	11%	12%
VCR 1+	87%	87%	84%	82%	79%	70%
DVD 1+ (inc DVDR)	35%	52%	72%	80%	86%	88%
DVD 2+ (inc DVDR)	5%	11%	21%	27%	31%	34%
Portable TV	6%	4%	5%	3%	4%	3%
Teletext TV	20%	22%	24%	24%	24%	24%
Games machine	28%	28%	32%	31%	31%	34%
PCs	59%	62%	67%	69%	73%	75%
Internet Access	46%	50%	55%	58%	63%	67%
STV	18%	19%	20%	23%	24%	26%
PC TV card	3%	3%	5%	6%	7%	9%

*Source: Regional TAM ES Surveys 2003-2008*





## **Software Update - Schedule Builder 2 Launch**

AGB Nielsen Media Research has released a new & improved version of its Schedule Builder product.

Schedule Builder is a user friendly tool that allows clients to quickly & efficiently build TV schedules.

In a single application Schedule Builder incorporates a Rates Management area, a Program Pick List to build schedules, the option to choose specific Campaign Weeks / Surveys and Reach & Frequency analysis.

### **Rates Management**

Schedule Builder now has the capability to load & access rate cards. Clients have the option to load a rate card from a file or build their own rate card & save them for future use.

There is also the facility to apply discounts to specific channels, set duration factors for differing spot lengths (eg. 30 sec vs 45 sec) & create time zone definitions (ie. Peak / Off Peak).

### **Program Pick list**

Schedule Builder now offers the flexibility to select spots & build a schedule from a Program Pick List.

Utilising the rate cards loaded via the Rates Management area, clients can now build schedules efficiently & cost effectively by sorting the Program Pick List – sorting options include Cost, CPT, CPM & Programme.

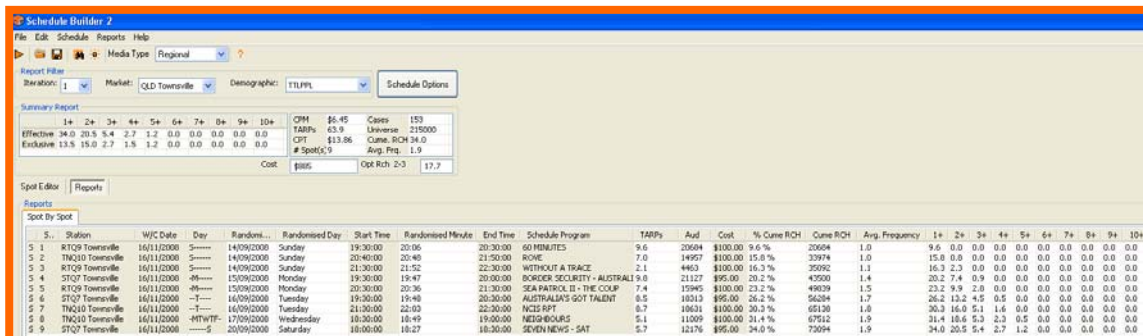
### **Reach & Frequency**

Choose to process your R&F using a range of options including:

- Fixed or Random spot placement
- Use the most available data or specific Campaign Weeks / Surveys
- Generate more than one schedule to compare the results (used in conjunction with Random Spot Placement)
- Set the schedule to “auto process” so each time a change is made the R&F results are dynamically updated

## Other Features

- Key Numbers - Ability to add Key Numbers to easily identify & plan for different spot lengths
- Campaign Weeks – Allows the selection of specific Sunday week commencing or Survey data for each week of your campaign. The Weeks / Surveys can be selected in any order & they can be non-consecutive
- Summary Line – Displays the total spots & total cost as the schedule is being built



**Summary Report**

	1s	2s	3s	4s	5s	6s	7s	8s	9s	10s	CPM	Cases
Effective	34.0	20.5	5.4	2.7	1.2	0.0	0.0	0.0	0.0	0.0	\$6.45	153
Expendable	13.5	15.0	2.7	1.5	1.2	0.0	0.0	0.0	0.0	0.0	\$13.86	215000
												Cume RCH 24.0
												Avg. Freq. 1.9
Cost											\$685	DKP Rch 2-3 17.7

**Spot Editor**

S.	Station	W/C	Date	Day	Random...	Randomised Day	Start Time	Randomised Minute	End Time	Schedule Program	TARPs	Aud	Cost	% Cume RCH	Cume RCH	Avg. Frequency	1s	2s	3s	4s	5s	6s	7s	8s	9s	10s	
1	RTQ9 Townsville	16/11/2008	S-----	14/09/2008	Sunday	19:30:00	20:06	20:30:00	20:06	60 MINUTES	9.6	20604	\$100.00	9.6%	20604	1.0	9.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2	TN20 Townsville	16/11/2008	S-----	14/09/2008	Sunday	20:40:00	20:49	21:50:00	20:49	ROWE	7.0	14957	\$100.00	15.0%	33974	1.0	15.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	RTQ9 Townsville	16/11/2008	S-----	14/09/2008	Sunday	21:30:00	21:52	22:30:00	21:52	WITHOUT A TRACE	2.1	4463	\$100.00	16.3%	35092	1.1	16.3	2.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	27Q7 Townsville	16/11/2008	M-----	15/09/2008	Monday	19:30:00	19:47	20:30:00	19:47	BORDER SECURITY - AUSTRALIA	9.0	21127	\$95.00	20.2%	43700	1.4	20.2	7.4	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	RTQ9 Townsville	16/11/2008	M-----	15/09/2008	Monday	20:30:00	20:36	21:30:00	20:36	SEA PATROL - THE COUP	7.4	15945	\$100.00	23.2%	49839	1.5	23.2	9.9	2.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6	27Q7 Townsville	16/11/2008	-T---	16/09/2008	Tuesday	19:30:00	19:40	20:30:00	19:40	AUSTRALIA'S GOT TALENT	6.5	10313	\$95.00	26.2%	56204	1.7	26.2	13.2	4.5	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7	TN20 Townsville	16/11/2008	-T---	16/09/2008	Tuesday	21:30:00	22:03	22:30:00	22:03	NCIS PPT	6.7	18631	\$100.00	30.3%	65130	1.8	30.3	16.0	5.1	1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8	TN20 Townsville	16/11/2008	-MTWTF--	17/09/2008	Wednesday	18:30:00	18:49	19:00:00	18:49	NEIGHBOURS	5.1	11009	\$100.00	31.4%	67512	1.9	31.4	18.6	5.3	2.3	0.5	0.0	0.0	0.0	0.0	0.0	0.0
9	27Q7 Townsville	16/11/2008	-----S	20/09/2008	Saturday	16:00:00	16:27	16:30:00	16:27	SEVEN NEWS - SAT	5.7	12176	\$95.00	34.0%	73094	1.9	34.0	20.5	5.4	2.7	1.2	0.0	0.0	0.0	0.0	0.0	0.0

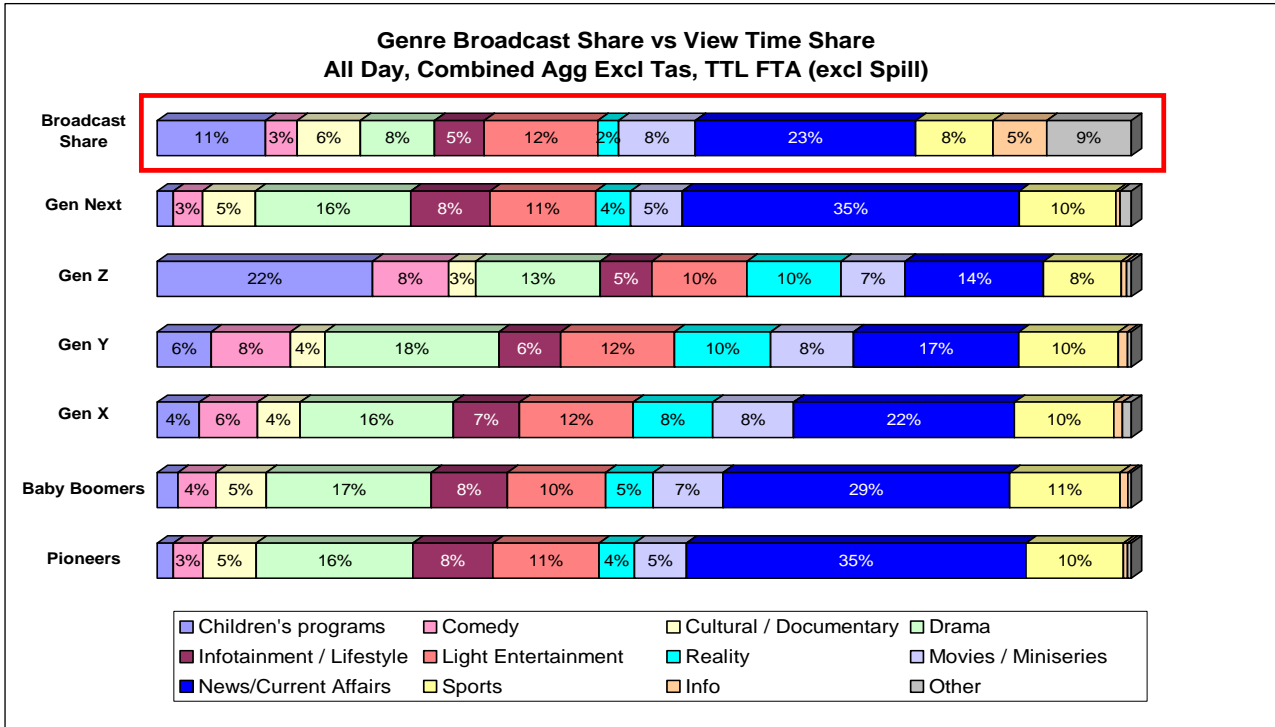
Note – rates in the above example are not real & used for demonstration

Data Source – Regional TAM

For further information, or to arrange a demonstration please contact your AGB Nielsen Media Research Client Service Representative or [Jason West](mailto:jason.west@agbnielsen.com.au) - (02) 9490 6500 or [jason.west@agbnielsen.com.au](mailto:jason.west@agbnielsen.com.au)

**Insights from the Regional Client Service Team**

**Analysis of the Broadcast Share of Viewing by Genre compared to Generational time spent viewing - Surveys 3-6, 2008**



Comparing genre broadcast share with actual viewing time share during Winter 2008, Reality Television is over-indexing in all generational targets and has now become the highest rating genre, despite contributing only 2% of the genre broadcast share.

Rank	Genre	AUD
1	Reality Television	318,978
2	Documentary	276,961
3	Drama	267,074
4	News/Current Affairs	207,222
5	Comedy	201,552
6	Specials	192,868
7	Other Sports	176,127
8	Infotainment / Lifestyle	168,358
9	Sports Event	165,734
10	Special Sports Event	150,384

For the same time period last year, Drama (now slipped to rank 3rd) was the highest rating genre followed by Reality Television then Comedy (now down to rank 5<sup>th</sup>).

Also interesting to note that the viewing time share of Sports is consistent across all generational targets.

The top rating reality programme over this period was "The Farmer Wants a Wife".

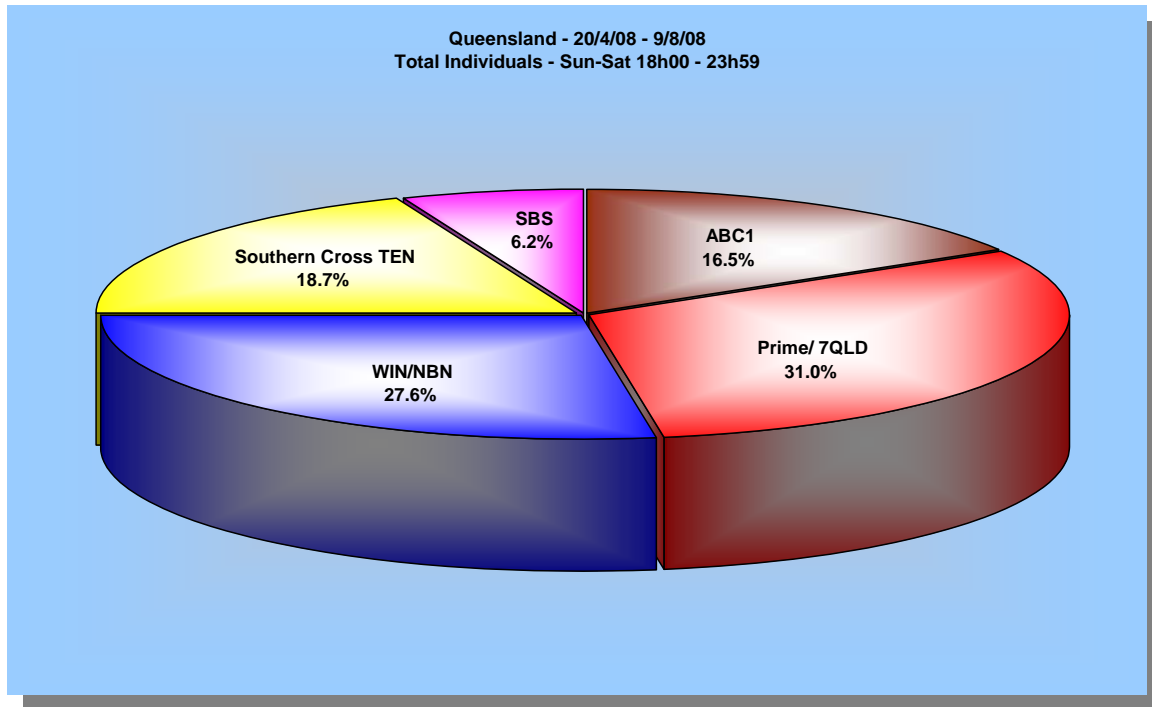
## Top 10 - Reality Television Programmes

Rank	Programme	Network	AUD
1	THE FARMER WANTS A WIFE	WIN/NBN	659,996
2	THE FORCE - BEHIND THE LINE	Prime/ 7QLD	579,185
3	BORDER SECURITY - AUSTRALIA'S FRONT LINE (R)	Prime/ 7QLD	574,291
4	FIRE 000	WIN/NBN	558,074
5	SEARCH & RESCUE	WIN/NBN	546,239
6	BIG BROTHER - PAMELA ANDERSON ENTERS THE HOUSE	Southern Cross TEN	518,709
7	THE FORCE - BEHIND THE LINE (R)	Prime/ 7QLD	518,646
8	BIG BROTHER - THE WINNER	Southern Cross TEN	517,515
9	SURF PATROL	Prime/ 7QLD	510,556
10	BIG BROTHER - FINALE NIGHT	Southern Cross TEN	494,213

Source: RegionalTAM & Arianna v7.2.2

Weeks 21 – 32 (excluding 8<sup>th</sup> & 9<sup>th</sup> August Olympics) 2008, Total Individuals, Combined Aggregate Markets excluding Tasmania, 02:00-25:59

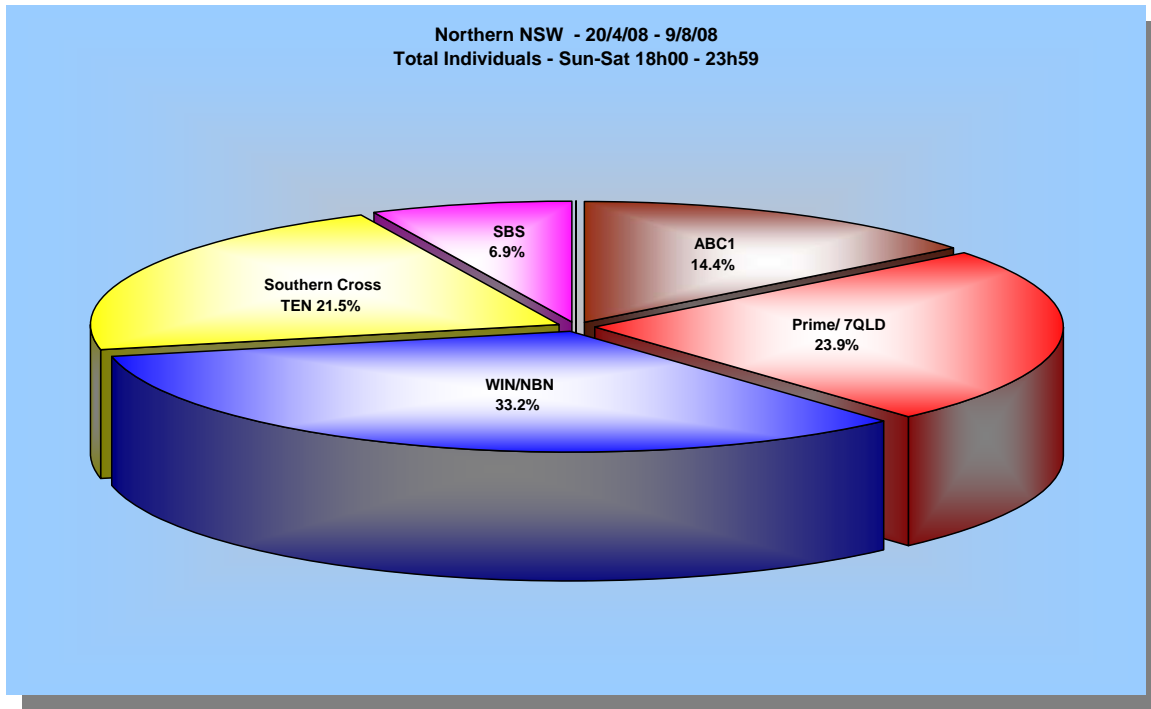
## Highlights from Surveys 3-6, 2008 from Queensland



## Top 20 Ranking programmes from Surveys 3-6, 2008

Rank	Description (grouped)	Channel	'000s
1	STATE OF ORIGIN RUGBY LEAGUE 2ND - MATCH	WIN	420,955
2	STATE OF ORIGIN RUGBY LEAGUE 1ST - MATCH	WIN	397,960
3	STATE OF ORIGIN RUGBY LEAGUE 2ND - POST MATCH	WIN	396,391
4	STATE OF ORIGIN RUGBY LEAGUE 3RD - MATCH	WIN	373,862
5	STATE OF ORIGIN RUGBY LEAGUE 3RD - POST MATCH	WIN	320,209
6	STATE OF ORIGIN RUGBY LEAGUE 2ND - PRE MATCH	WIN	306,051
7	STATE OF ORIGIN RUGBY LEAGUE 1ST - POST MATCH	WIN	302,011
8	STATE OF ORIGIN RUGBY LEAGUE 1ST - PRE MATCH	WIN	296,331
9	STATE OF ORIGIN RUGBY LEAGUE 3RD - PRE MATCH	WIN	276,944
10	SEVEN'S BEIJING OLYMPICS: D1 PRIMETIME	Prime	243,369
11	COUNTDOWN TO BEIJING	Prime	232,470
12	RSPCA ANIMAL RESCUE	Prime	213,584
13	THE BIGGEST LOSER - FINALE	Sth Cross TEN	212,637
14	NEWS	Prime	212,205
15	AUSTRALIA'S GOT TALENT	Prime	209,462
16	SEVEN'S BEIJING OLYMPICS: OPENING CEREMONY	Prime	208,677
17	THE ONE - AUSTRALIA'S MOST GIFTED PSYCHIC	Prime	205,657
18	60 MINUTES	WIN	197,498
19	NEWS/TT	Prime	192,991
20	CHINA REVEALED	Prime	190,257

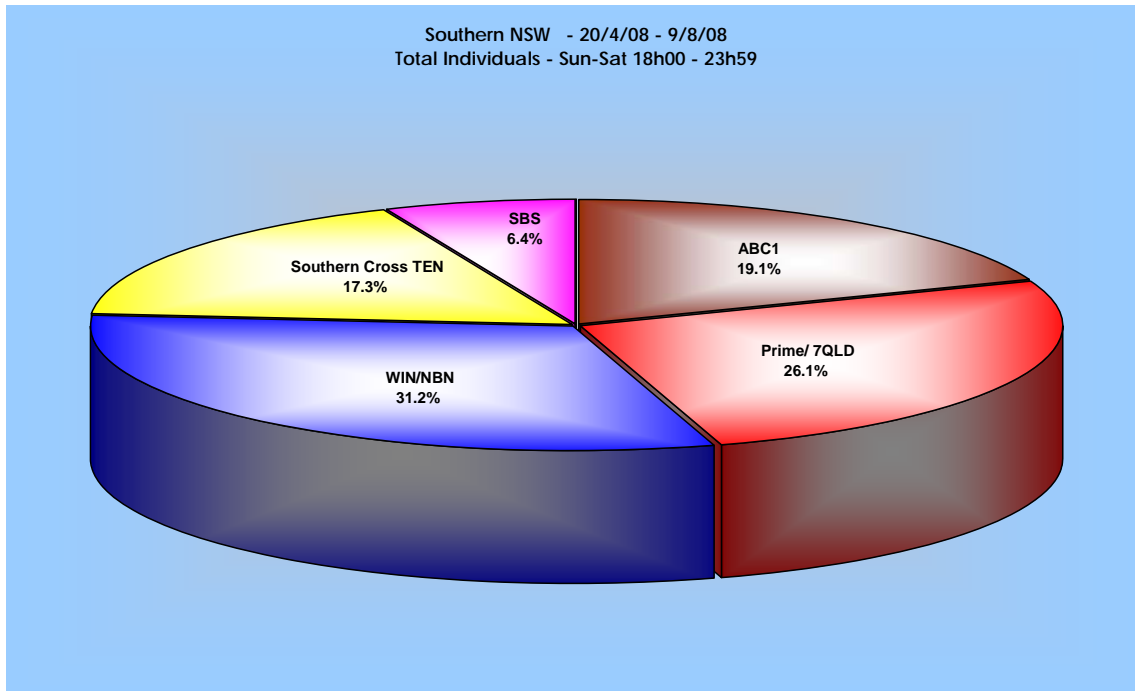
## Highlights from Surveys 3-6, 2008 from Northern NSW



## Top 20 Ranking programmes from Surveys 3-6, 2008

Rank	Description (grouped)	Channel	'000s
1	STATE OF ORIGIN RUGBY LEAGUE 3RD - MATCH	NBN	431,358
2	STATE OF ORIGIN RUGBY LEAGUE 2ND - MATCH	NBN	379,917
3	STATE OF ORIGIN RUGBY LEAGUE 1ST - MATCH	NBN	379,725
4	STATE OF ORIGIN RUGBY LEAGUE 2ND - POST MATCH	NBN	332,103
5	STATE OF ORIGIN RUGBY LEAGUE 3RD - PRE MATCH	NBN	322,460
6	STATE OF ORIGIN RUGBY LEAGUE 2ND - PRE MATCH	NBN	307,480
7	STATE OF ORIGIN RUGBY LEAGUE 3RD - POST MATCH	NBN	305,333
8	STATE OF ORIGIN RUGBY LEAGUE 1ST - POST MATCH	NBN	296,903
9	STATE OF ORIGIN RUGBY LEAGUE 1ST - PRE MATCH	NBN	286,899
10	NATIONAL NEWS SUNDAY	NBN	248,798
11	60 MINUTES	NBN	245,469
12	DOMESTIC BLITZ	NBN	244,127
13	UNDERBELLY	NBN	242,725
14	SEVEN'S BEIJING OLYMPICS: D1 PRIMETIME	Prime	224,617
15	A CURRENT AFFAIR	NBN	217,031
16	HOLE IN THE WALL	NBN	214,296
17	SEVEN'S BEIJING OLYMPICS: D1 FRINGE	Prime	212,275
18	SEA PATROL II - THE COUP	NBN	208,319
19	THE BIGGEST LOSER - FINALE	Sth Cross TEN	203,521
20	DAVID ATTENBOROUGH'S BEAR - A SPY IN THE WOODS	NBN	200,797

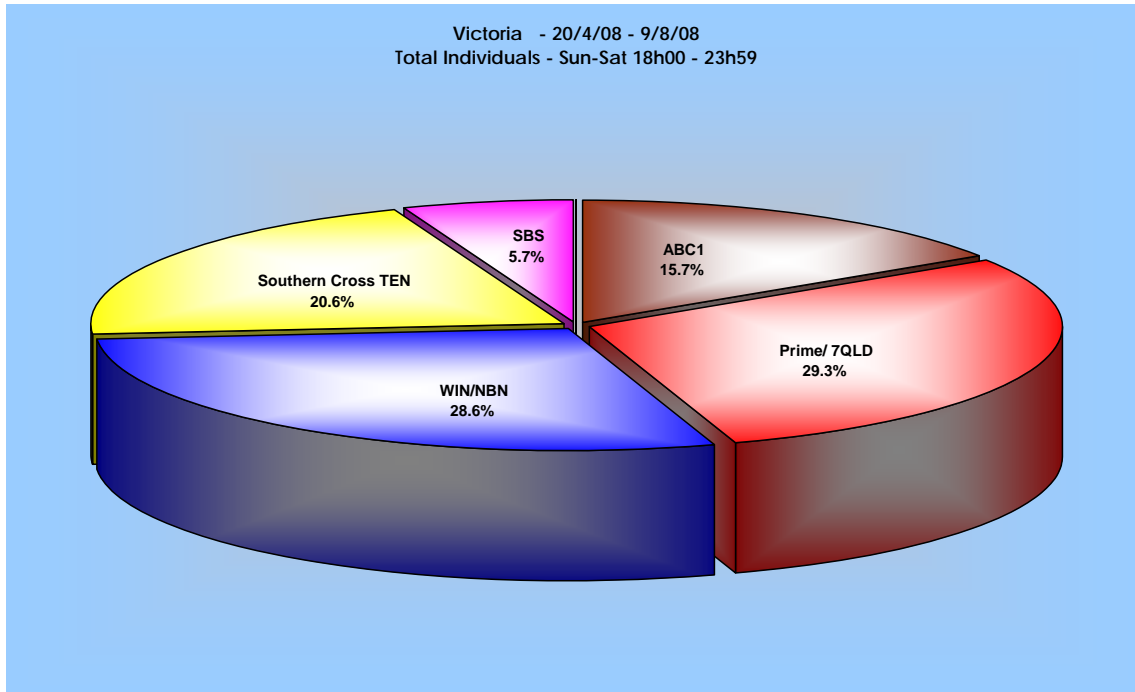
## Highlights from Surveys 1&2, 2008 from Southern NSW



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

Rank	Description (Grouped)	Channel	'000s
1	STATE OF ORIGIN RUGBY LEAGUE 1ST - MATCH	WIN	365,015
2	STATE OF ORIGIN RUGBY LEAGUE 2ND - MATCH	WIN	322,292
3	STATE OF ORIGIN RUGBY LEAGUE 3RD - MATCH	WIN	321,941
4	STATE OF ORIGIN RUGBY LEAGUE 1ST - POST MATCH	WIN	320,918
5	STATE OF ORIGIN RUGBY LEAGUE 2ND - POST MATCH	WIN	263,085
6	STATE OF ORIGIN RUGBY LEAGUE 2ND - PRE MATCH	WIN	259,556
7	STATE OF ORIGIN RUGBY LEAGUE 1ST - PRE MATCH	WIN	257,295
8	STATE OF ORIGIN RUGBY LEAGUE 3RD - PRE MATCH	WIN	242,096
9	STATE OF ORIGIN RUGBY LEAGUE 3RD - POST MATCH	WIN	227,837
10	SEVEN'S BEIJING OLYMPICS: D1 PRIMETIME	Prime	215,316
11	UNDERBELLY	WIN	208,629
12	SEVEN'S BEIJING OLYMPICS: OPENING CEREMONY	Prime	194,922
13	60 MINUTES	WIN	181,355
14	DOC MARTIN-EV	ABC1	178,674
15	DOMESTIC BLITZ	WIN	175,203
16	SEVEN'S BEIJING OLYMPICS: D1 FRINGE	7QLD	173,437
17	THE BIGGEST LOSER - FINALE	Sth Cross TEN	171,481
18	MCLEODS DAUGHTERS	WIN	171,389
19	ALL SAINTS	Prime	166,960
20	AUSTRALIA'S GOT TALENT	Prime	164,626

## Highlights from Surveys 3-6, 2008 from Victoria

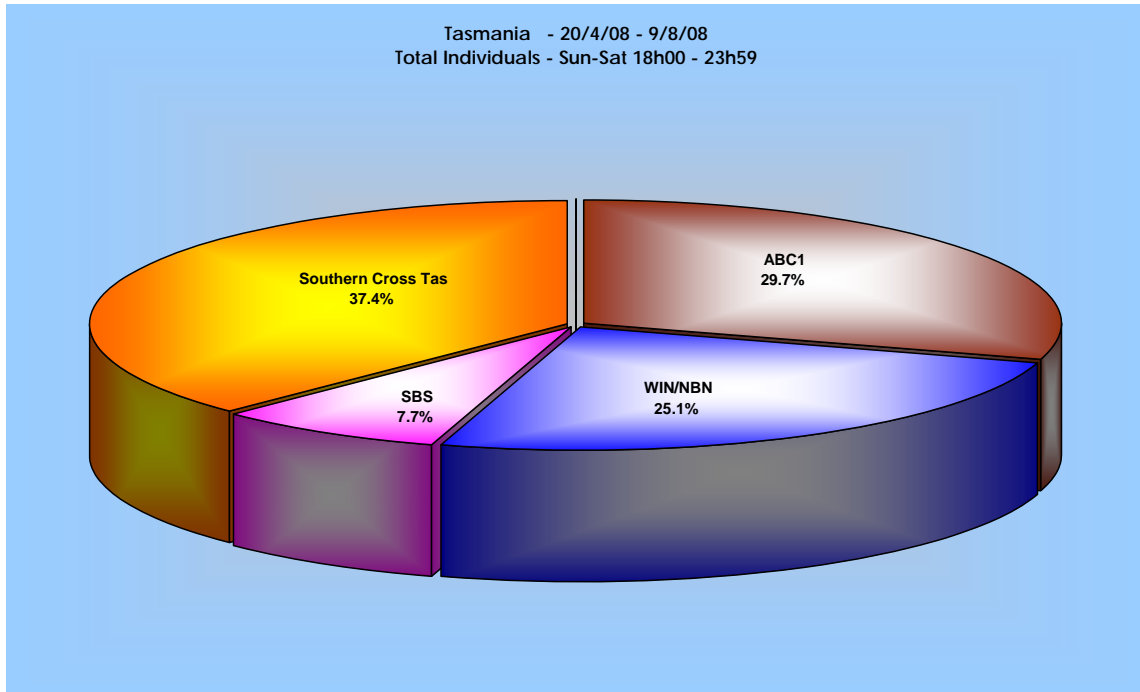


## Top 20 Ranking programmes Surveys 3-6, 2008

Rank	Description (grouped)	Channel	'000s
1	ANZAC DAY AFL	Sth Cross TEN	182,871
2	60 MINUTES	WIN	174,810
3	SEVEN'S BEIJING OLYMPICS: OPENING CEREMONY	Prime	171,025
4	DAVID ATTENBOROUGH'S LION - A SPY IN THE DEN	WIN	170,644
5	SEVEN'S BEIJING OLYMPICS: D1 PRIMETIME	Prime	170,391
6	THE FARMER WANTS A WIFE	WIN	162,196
7	IT TAKES TWO	Prime	161,891
8	E.J. WHITTEN LEGENDS GAME	WIN	159,620
9	SEVEN NEWS - SUN	Prime	159,173
10	HALL OF FAME TRIBUTE MATCH	Sth Cross TEN	159,049
11	CSI: MIAMI	WIN	155,246
12	SEVEN'S AFL: RND 17: HAWTHORN VS GEELONG	Prime	154,915
13	SEVEN'S AFL: RND 18: COLLINGWOOD VS HAWTHORN	Prime	153,343
14	AUSTRALIA'S GOT TALENT	Prime	152,533
15	SEVEN'S AFL: RND 19: MELBOURNE VS GEELONG	Prime	152,142
16	MONDAY AFTERNOON AFL	Sth Cross TEN	151,722
17	THE BIGGEST LOSER - FINALE	Sth Cross TEN	151,000
18	CSI: CRIME SCENE INVESTIGATION	WIN	150,344
19	TV WEEK LOGIE AWARDS ARRIVALS	WIN	150,321
20	SEVEN'S AFL: RND 16: KANGAROOS VS COLLINGWOOD	Prime	150,264



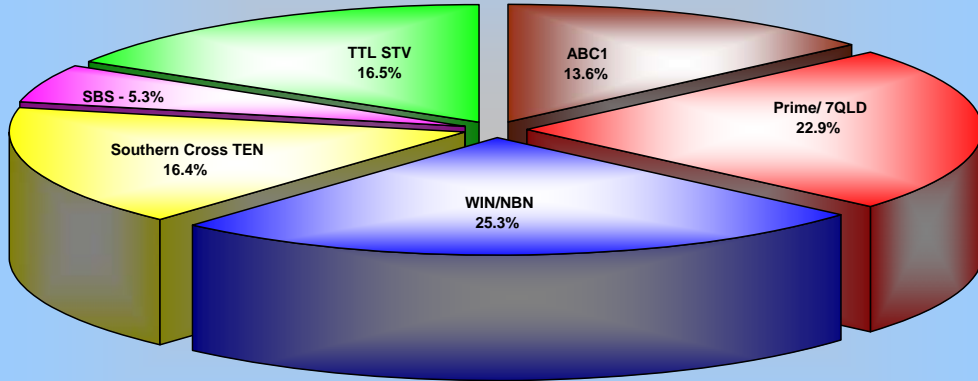
## Highlights from Surveys 3-6, 2008 from Tasmania



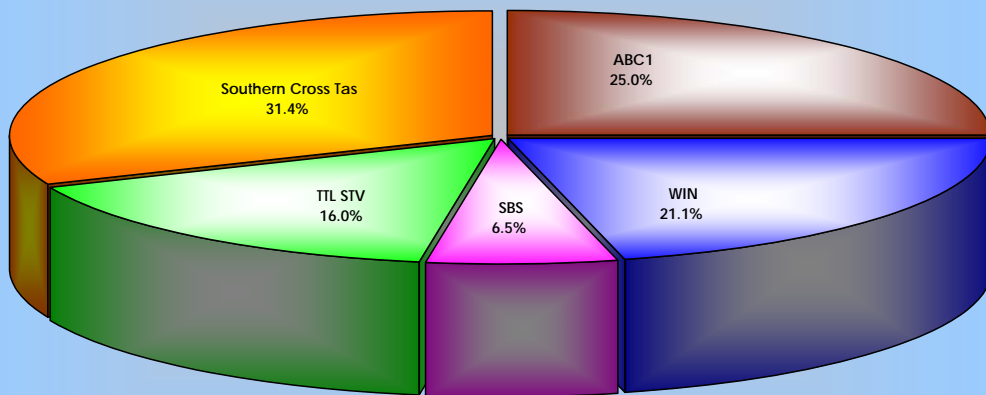
## Top 20 Ranking programmes Surveys 3-6, 2008

Rank	Description (grouped)	Channel	'000s
1	IT TAKES TWO	Southern Cross Tas	115,746
2	SEVEN'S BEIJING OLYMPICS: OPENING CEREMONY	Southern Cross Tas	114,435
3	DOC MARTIN-EV	ABC1	108,238
4	AUSTRALIA'S GOT TALENT	Southern Cross Tas	99,379
5	FOYLE'S WAR-EV	ABC1	96,847
6	2008 AFL COLLINGWOOD V HAWTHORN	Southern Cross Tas	92,761
7	THE REAL SEACHANGE	Southern Cross Tas	91,568
8	NIGHTLY NEWS SUNDAY	Southern Cross Tas	91,336
9	THE ONE- AUSTRALIA'S MOST PSYCHIC	Southern Cross Tas	90,653
10	ROBIN HOOD-EV	ABC1	90,643
11	WORLD'S GOT TALENT	Southern Cross Tas	89,548
12	DOCTOR WHO-EV	ABC1	88,843
13	NIGHTLY NEWS WEEKDAYS	Southern Cross Tas	88,351
14	ALL SAINTS	Southern Cross Tas	87,340
15	NORTHANGER ABBEY-EV	ABC1	87,289
16	WILD CHINA-EV	ABC1	86,253
17	HOME AND AWAY	Southern Cross Tas	84,918
18	TODAY TONIGHT	Southern Cross Tas	83,607
19	THAT 70'S SHOW	Southern Cross Tas	83,478
20	2008 AFL HAWTHORN V GEELONG	Southern Cross Tas	82,790

Combined Agg. Mkts excl. Tas - 20/4/08 - 9/8/08  
Total Individuals - Sun-Sat - 18h00 - 23h59



Tasmania - 20/4/08 - 9/8/08  
Total Individuals - Sun-Sat - 18h00 - 23h59



## TV News from around the Globe: United Kingdom

Rank	Programme	Channel	Total Viewers
1	THE X FACTOR (SAT 1930)	ITV1	9,960,000
2	CORONATION STREET (MON 2028)	ITV1	9,450,000
3	CORONATION STREET (MON 1933)	ITV1	9,310,000
4	CORONATION STREET (FRI 1934)	ITV1	8,480,000
5	EASTENDERS (MON 1959)	BBC1	8,380,000
6	CORONATION STREET (WED 1930)	ITV1	8,190,000
7	CORONATION STREET (FRI 2031)	ITV1	8,180,000
8	EASTENDERS (FRI 2000)	BBC1	8,020,000
9	EASTENDERS (THU 1929)	BBC1	7,500,000
10	EMMERDALE (MON 1901)	ITV1	6,730,000
11	WHO DO YOU THINK YOU ARE? (WED 2100)	BBC1	6,700,000
12	EMMERDALE (FRI 1902)	ITV1	6,380,000
13	ANTIQUES ROADSHOW (SUN 1901)	BBC1	6,250,000
14	STRICTLY COME DANCING (SAT 1830)	BBC1	6,220,000
15	EASTENDERS (TUE 1930)	BBC1	6,220,000
16	EMMERDALE (THU 1901)	ITV1	6,170,000
17	TEN O'CLOCK NEWS (WED 2200)	BBC1	6,110,000
18	EMMERDALE (TUE 1859)	ITV1	6,090,000
19	EMMERDALE (WED 1859)	ITV1	6,020,000
20	TESS OF THE D'URBERVILLES (SUN 2100)	BBC1	5,960,000

Source: [www.barb.co.uk/](http://www.barb.co.uk/) Terrestrial viewing summary - individuals 4+ (including timeshift) - w/e 14/9/2008

### Snippets:

#### **Consumer demand drives HD online content**

Rich media specialist Akamai Technologies has revealed that trend research conducted with attendees of this year's IBC2008 shows that 82 per cent of European broadcast organisations have plans to offer High Definition (HD) video content to online audiences in the next 12 months.

Akamai's survey – involving primarily European TV stations, TV networks and video and film production professionals in Europe - revealed that nearly 50 per cent of those questioned believed that consumer demand for higher quality video, in addition to the ability to attract new audiences with differentiated video experiences, were the primary drivers for offering HD content online.

Close to one-fifth of those surveyed are already offering HD experiences online, and the market in Europe is expected to expand over the coming year. When asked about their timeframes for providing online HD video, 64.5 per cent of broadcast organisations responded that they were either offering HD programming to online audiences already or planned to do so in the next 12 months, with 19 per cent planning to do so in the next six months. Video quality

standards are also increasing the bitrates by which content is being delivered. Close to 60 per cent of the European broadcasters questioned stated that they planned to deliver their online HD content in bitrates well over 4 Mbps, and around 20 per cent said that they were even aiming for bitrates of more than 8 Mbps.

Short-form content is still leading the pack in terms of consumer interest, with 63 per cent of respondents saying they would continue to offer this to their viewers. However, close to 50 per cent also indicated that they would be offering longer-form content, such as movies and full-length TV episodes. This is in contrast to a survey Akamai conducted with North American broadcasters in November 2007 that revealed that only 35 per cent planned to offer long-form content.

"This indicates to Akamai that broadcasters' increased plans to support long-form content is being driven by the shift towards Internet Television and Internet-enabled devices that allow viewers to access online video content from the comfort of their living rooms," said Alex Gibbons, Director, Digital Media Europe at Akamai. "The shift toward Internet TV has users demanding new video quality standards and offers broadcasters ample opportunities to develop new premium business models around HD content."

Source: [www.advanced-television.com](http://www.advanced-television.com)

### **UK brands failing to monetise digital media strategies**

Market research by industry analyst, Redshift Research, on behalf of Oxygen8 Communications, has found that major UK brands are still failing to monetise their digital media strategies, and campaigns are often in direct competition with traditional print or TV advertising campaigns.

The research finds that whilst consumers are interested in accessing more services from organisations on their mobile phones, corporates and media companies are failing to make the most of digital opportunities. Two thirds of organisations recognise that consumers are less receptive to traditional advertising, 76 per cent of corporates feel that Internet advertising is more effective than both TV and print. This sentiment is echoed by media companies, where 83 per cent felt that SMS and email is more effective than the traditional channels. Only 13% of media companies and 23 per cent of corporates believe that traditional media is still more important than digital media.

Budget (40 per cent) and lack of skill and experience (28 per cent) are quoted as the main barriers to using digital media more frequently. Furthermore, whilst 60 per cent of companies think it would be useful to have one single CRM system/database combining traditional and digital media campaigns, 65 per cent collect and analyse campaign data in separate systems, thus rendering them unable to gain a full view into any cross media campaigns' performance

Source: [www.advanced-television.com](http://www.advanced-television.com)

## **TV catch-up services fail to dent traditional viewing**

Broadband video catch-up services such as the BBC iPlayer are not cannibalising traditional TV viewing despite their much-hyped popularity, according to a report.

Meanwhile, commercial broadcasters are still struggling to generate revenues from these fledgling web offerings.

TV marketing body Thinkbox said that broadband TV services - such as 4oD, the iPlayer, ITV.com, the Sky Player and Demand Five - "seems to be incremental" to the traditional broadcast TV that people watched in the first six months of the year.

UK viewers watched an average of 3.77 hours of broadcast TV a day in the first half of the year, a 2% increase on the five-year average for the period, according to figures compiled by Thinkbox from ratings body Barb.

"That both broadcast and online TV platforms are growing simultaneously underlines how they fulfil different needs for viewers and that they can co-exist and indeed promote each other," said Thinkbox.

However, analysts argue that the broadband TV market is so small for these online ventures that the true impact cannot yet be known.

"These [online] services are not cannibalising traditional TV viewing," said Vincent Letang, an analyst at Screen Digest.

"First of all, in terms of the amount of money spent by advertisers, it is so small that it doesn't divert from broadcast TV money. The other reason is that in terms of the time spent using online TV services, it is actually very small," he added.

Despite the bear market for advertiser-funded media businesses generally, Thinkbox also said that commercial broadcast TV had a "record breaking" first six months of the year.

Total commercial impacts - the viewing of one ad, one time, by one person - was up 6% year-on-year.

And commercial broadcast viewing is "performing very strongly", up 4% on the same period last year, fuelled by factors including poor weather and the increase in digital TV penetration.

"This is a shaft of very bright light that cuts through any economic gloom," said Tess Alps, chief executive of Thinkbox.

"Advertisers should be taking advantage of a medium that offers proven effectiveness, increasing value and is growing," Alps added.

However, the outlook for UK TV advertising revenue for the second half of 2008 is less rosy, with market leader ITV last week predicting it was heading for a 20% year on year dip in September.

"There is an apparent paradox or dilemma around how audiences can be up and ad revenues down, but one reason that explains it is because demand for TV advertising is flat," said Letang.

"This means there has been an increase in the supply of ads in the market and that means prices dropping. You could say that eyeballs have never been cheaper in the last 20 years," he added.

Letang said that while this might seem like a situation where advertisers might look to spend more to take advantage of bargain prices, many are in fact actually cutting spending because they can reach the same audience numbers for less money.

"Clients are looking at cutting costs, not expanding in this market," he added. "So it is actually not that great news that commercial impacts are up as this means that prices are down."

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

### TV News from around the Globe: United States

Season-to-Date by Viewers						
2007 - 2008 Season Through September 21, 2008						
Rank	Program Name	Net	Day	Time	Total Viewers	Total no. of Episodes
1	AMERICAN IDOL-TUESDAY	FOX	Tue	8:00 PM	28,894,000	19
2	AMERICAN IDOL-WEDNESDAY	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	NBC SUNDAY NIGHT FOOTBALL	NBC	Sun	VAR	15,872,000	16
8	SURVIVOR: CHINA	CBS	Thu	8:00 PM	15,183,000	11
9	HOUSE	FOX	Tue	9:00 PM	14,928,000	21
10	CSI	CBS	Thu	9:00 PM	13,710,000	49
11	SURVIVOR: MICRONESIA	CBS	Thu	8:00 PM	13,607,000	12
12	LOST	ABC	Thu	9:00 PM	13,402,000	15
13	HEROES	NBC	Mon	9:00 PM	13,071,000	11
14	NCIS	CBS	Tue	8:00 PM	12,682,000	47
15	AMERICA'S GOT TALENT	NBC	Tue	9:00 PM	12,654,000	11
16	TWO AND A HALF MEN	CBS	Mon	9:00 PM	12,296,000	45
17	CSI: MIAMI	CBS	Mon	10:00 PM	12,091,000	44
18	AMAZING RACE 12	CBS	Sun	VAR	11,800,000	11
19	DESPERATE HOUSEWIVES	ABC	Sun	9:00 PM	11,685,000	31
20	60 MINUTES	CBS	Sun	7:00 PM	11,570,000	51

Source: Zapa2it.com

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## Snippets

### US DTV transition awareness rises

Consumer awareness of the transition to digital television (DTV) has grown 12 percentage points to 86 per cent since the first of the year, according to new market research released today by the Consumer Electronics Association (CEA). This growth can be attributed to the ongoing joint educational efforts of government and private sector entities.

CEA also released new survey results that predict the continued success of the National Telecommunication and Information Administration (NTIA)'s converter box coupon program.

With five months remaining before the transition date, almost one-third (32 per cent) of households using an antenna on at least one television have already applied for their converter box coupon.

Another 37 per cent of antenna households plan to request their coupon within the year, while 21 per cent don't plan to request a coupon at all.

This data suggests that antenna households will request an additional 14 million converter box coupons in the coming months, well within the available number of coupons remaining in NTIA's programme.

Source: [www.advanced-television.com](http://www.advanced-television.com)