WISE Australia

Spring '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 TAM to release Digital TV Viewing Data for Tasmania from November 30th, 2008

Regional TAM, the owners of television audience measurement (TAM) services for Australian Regional Aggregated markets, today announced the release date and revised specifications for the Tasmanian market.

As from November 30th, 2008 viewing data for the new Digital channels TDT and ABC2 will become available to the market in addition to TVT and TNT digital data.

"After extensive field tests conducted by the survey contractor AGBNMR we are looking forward to the imminent switch-on to measure all digital terrestrial TV channels as well as the existing analogue stations." said Regional TAM Chairman, Bruce Abraham.

"Tasmania is the leading Australian regional market in the take up of digital services and the expansion of the survey to provide users of television audience data is part of our ongoing commitment to provide an accurate, high quality audited television audience rating service."

For further information or comment, please contact Mark Newstead, Chair of the Regional Technical Group, on 0408 770266.

From Senator the Hon Stephen Conroy - Minister for Broadband, Communications and the Digital Economy -

Sunshine Coast a digital economy hot-spot

The Minister for Broadband, Communications and the Digital Economy, Senator Stephen Conroy, officially launched the Noosa Clever Networks (Cooroy Knowledge Precinct) project on October 31st, 2008

"This project is well aligned with the Rudd Government's vision for Australia's digital future," Senator Conroy said.

"The Noosa Clever Networks project will help drive the development of the digital economy. It will assist business growth and enable the expanded rollout of government services in the priority sectors of health, education, community and emergency services across the Sunshine Coast region."

The Sunshine Coast Regional Council, in partnership with Mach Technology and Allegro Networks, has led a group to match Australian Government funding of $4.57 million for broadband projects in Noosa and Maroochy.

"This is a fine example of different levels of governments and the private sector working together to ensure that broadband infrastructure and broadband-enabled services are available across Australia," Senator Conroy said.

The Australian Government, through the $118 million Clever Networks program, is currently funding 26 innovative services delivery projects and 22 broadband development initiatives in regional, rural and remote areas.

Recent launches have included:

Association of Independent Schools of Victoria VICTOR project, connecting over 90 regional and rural independent schools in Victoria.

Telehealth in Western Australia, extending the WA telehealth network to a further 19 sites and upgrading the existing 59-site network to support end-to-end e-health services.

Bush Medivac Western Australia, delivering improved emergency and health services to regional and remote areas via state-of-art terrestrial and non-terrestrial broadband infrastructure.

Further information on the Clever Networks program is available at www.dbcde.gov.au/clevernetworks

Minister sets Digital TV switchover timetable

Date: 19 October 2008

The Minister for Broadband, Communications and the Digital Economy, Senator Stephen Conroy, today released the timetable for the switchover to digital television.

"The digital TV revolution is in full swing and Australians now know when they will need to be digital-ready," Senator Conroy said.

"The digital television switchover is a challenge on the scale of the 1966 decimal currency change. The Rudd Government's region-by-region approach will ensure Australia is best placed to meet the 31 December 2013 deadline for analog switch-off."

The Victorian region surrounding Mildura, which leads the nation with digital TV take-up, will lead with analog switch-off in the first half of 2010.

Under this timetable analog broadcasting will cease in the Mildura/Sunraysia district in a window between 1 January and 30 June 2010.

"The regional broadcasting licence covering the Sunraysia district in northern Victoria has the highest penetration of digital TV in Australia, at over 70 per cent of homes, so it makes sense to start there," Senator Conroy said.

"This particular community is already well informed about the benefits of digital TV after the third commercial network entered the market in 2006 and drove take-up with digital-only broadcasts."

"Depending on local conditions and community feedback I will set the final date within the switch-off window next year. Importantly people in this community now have plenty of notice to be digital-ready."

"The Digital Switchover Taskforce will be working with broadcasters, retailers, antenna installers and the wider Sunraysia community throughout 2009 to ensure information is available to assist people to join the digital TV revolution," Senator Conroy said.

The Taskforce is developing an extensive labelling scheme for digital-ready TV equipment and services and will launch a communication campaign to raise awareness of the label to assist consumers early next year.

Broken Hill in NSW and Mt Gambier, Riverland and Spencer Gulf in South Australia will turn off analog broadcasts in the second half on 2010 and the rest of regional Victoria in the first half of 2011.

Regional Queensland, excluding remote western and northern areas, will switch-off analog in the second half of 2011. The major regional centres of NSW will switch-off analog in 2012.

Brisbane, the Sunshine Coast, the Gold Coast, Perth and Tasmania will switch-off analog in the first half of 2013 and Sydney, Melbourne, Adelaide, remote western, central and eastern Australia will be digital-only by the end of 2013.

"After years of inaction by the previous Government, the Rudd Government has made a firm commitment to digital television switchover and is taking practical action to ensure a smooth transition," Senator Conroy said.

Digital switchover is important for all Australians as it not only provides access to such things as 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.

STATE	Switchover Area	Major Centres	Analog Switch-off Window
VIC	Mildura/Sunraysia	Mildura	1 January – 30 June 2010
SA	Broken Hill	Broken Hill	1 July – 31 December 2010
SA	Riverland	Renmark and Loxton	1 July – 31 December 2010
SA	Mt Gambier/South East South Australia	Mt Gambier, Naracoorte and Bordertown	1 July – 31 December 2010
SA	Spencer Gulf	Port Lincoln, Whyalla, Port Augusta	1 July – 31 December 2010
VIC	Gippsland	Traralgon, Bairnsdale and Mallacoota	1 January – 30 June 2011
VIC	North Central Victoria	Bendigo and Swan Hill	1 January – 30 June 2011
VIC	South West Victoria	Ballarat, Warrnambool and Horsham	1 January – 30 June 2011
VIC	Goulburn Valley /Upper Murray	Albury/Wodonga, Wangaratta and Shepparton	1 January – 30 June 2011
QLD	Wide Bay	Hervey Bay, Bundaberg and Maryborough	1 July – 31 December 2011
QLD	Capricornia	Rockhampton, Emerald and Yeppoon	1 July – 31 December 2011
QLD	QLD Central Coast and Whitsundays	Mackay, Proserpine and Bowen	1 July – 31 December 2011
QLD	Darling Downs	Toowoomba, Warwick and Dalby	1 July – 31 December 2011
QLD	North Queensland	Townsville, Ayr and Charters Towers	1 July – 31 December 2011
QLD	Far North Queensland	Cairns, Port Douglas and Innisfail	1 July – 31 December 2011
NSW	Griffith/Murrumbidgee Irrigation Area	Griffith and Hay	1 January – 30 June 2012
NSW	South West Slopes and Eastern Riverina	Wagga Wagga and Gundagai	1 January – 30 June 2012
NSW	Illawarra and the South Coast	Wollongong, Ulladulla and Eden	1 January – 30 June 2012
NSW	Central Tablelands and Central Western Slopes	Dubbo, Orange and Mudgee	1 January – 30 June 2012
NSW	ACT and Southern Tablelands	Canberra, Thredbo and Cooma	1 January – 30 June 2012
NSW	North West Slopes and Plains	Tamworth, Armidale and Inverell	1 July – 31 December 2012
NSW	Richmond/Tweed	Byron Bay, Tenterfield and Lismore	1 July – 31 December 2012
NSW	Northern Rivers	Coffs Harbour, Forster and Grafton	1 July – 31 December 2012
NSW	Hunter	Newcastle, Port Stephens	1 July – 31 December 2012
TAS	Tasmania	Hobart, Launceston and King Island	1 January – 30 June 2013
Metro	Perth	Perth	1 January – 30 June 2013
Metro	Brisbane	Brisbane, Gold Coast and Noosa	1 January – 30 June 2013
Metro	Melbourne	Melbourne	1 July – 31 December 2013
Metro	Adelaide	Adelaide	1 July – 31 December 2013
Metro	Sydney	Sydney and Gosford	1 July – 31 December 2013
Remote	Regional and Remote Western Australia	Kalgoorlie, Broome and Bunbury	1 July – 31 December 2013
Remote	Remote Central & Eastern Australia	Darwin, Alice Springs and Mt Isa	1 July – 31 December 2013

THE VIEWERPIC INDEX

AGB Nielsen Media Research has released a new & improved version of it's AGB Nielsen Media Research has developed a measure to demonstrate a viewers commitment to a program, called The ViewerPIC Index.

It takes the unique approach of using the TAM currency data, building the measure based on actual viewing behaviour, without the need for any additional response from panel members

In summary The ViewerPIC Index:

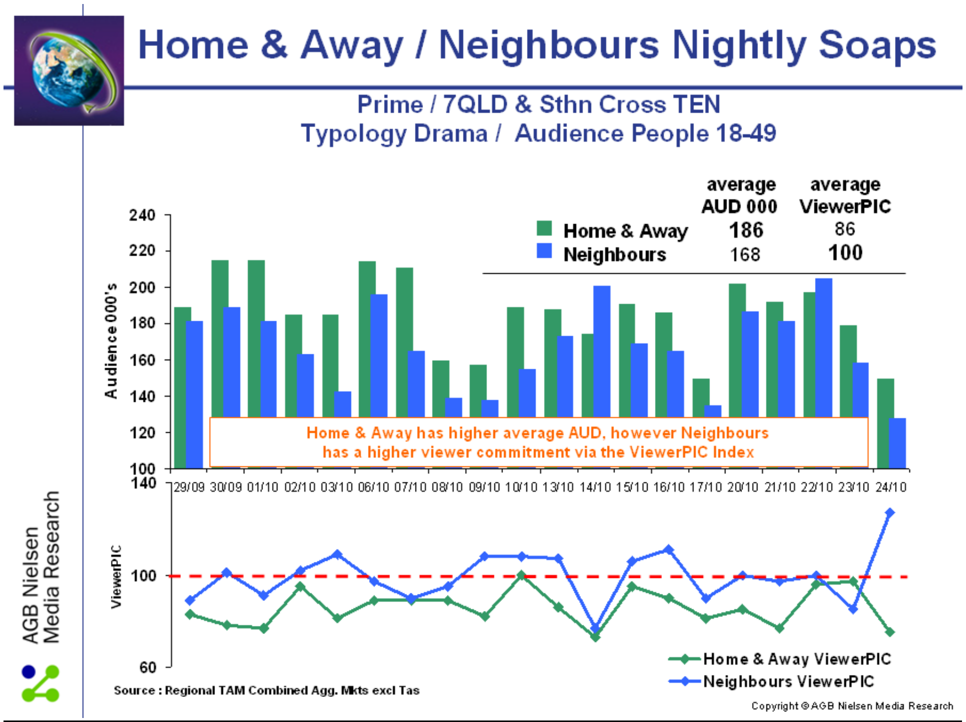
- is a relative program index
- based on actual viewing behaviour to measure "commitment"
- derived from the existing TAM data
- no additional response from panel members required
- offers an alternative to the traditional approach
- accessed via a user friendly web interface

The ViewerPIC Index is based on the following elements:

- **viewing continuity**
- **the competition in the same time band**
- **program duration**
- **program typology**

The ViewerPIC Index can be used:

- to assess the impact of a programme timeslot change
- to predict programme performance
- as a differentiator between similar rating programmes (see Home & Away / Neighbours example)
- to identify commitment to niche programming



<u>**The strengths / advantages of The ViewerPIC Index are:**</u>

- <u>does not use claimed likeability or recall</u>
- <u>based on actual viewing behaviour</u>
- <u>a single data point available for each episode</u>
- <u>overnight delivery via user friendly web interface</u>

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

Generational Top 10's for 2008

The following tables outline the 2008 viewing favourites by Generational groups within the combined Aggregated markets, excluding Tasmania.

Target	Pioneers(born Pre 1946)	Market
Top 10	Description (grouped)	Channel \ Variable
1	THE 2008 MELBOURNE CUP CARNIVAL: MELBOURNE CUP-THE RACE	Prime/ 7QLD
2	DOC MARTIN-EV	ABC1
3	STATE OF ORIGIN RUGBY LEAGUE NSW V QLD 3RD - MATCH	WIN/NBN
4	STATE OF ORIGIN RUGBY LEAGUE NSW V QLD 1ST - MATCH	WIN/NBN
5	THE PRIME MINISTER IS MISSING-EV	ABC1
6	MIDSOMER MURDERS-EV	ABC1
7	FOYLE'S WAR-EV	ABC1
8	ROUGH DIAMOND-EV	ABC1
9	NEWS	Prime/ 7QLD
10	RUGBY LEAGUE GRAND FINAL	WIN/NBN

Target	Baby Boomers(1946-1960)	Market
Top 10	Description (grouped)	Channel \ Variable
1	STATE OF ORIGIN RUGBY LEAGUE QLD V NSW 2ND - MATCH	WIN/NBN
2	STATE OF ORIGIN RUGBY LEAGUE NSW V QLD 1ST - MATCH	WIN/NBN
3	STATE OF ORIGIN RUGBY LEAGUE NSW V QLD 3RD - MATCH	WIN/NBN
4	FIND MY FAMILY - REUNIONS	Prime/ 7QLD
5	PACKED TO THE RAFTERS	Prime/ 7QLD
6	60 MINUTES	WIN/NBN
7	FIND MY FAMILY	Prime/ 7QLD
8	RUGBY LEAGUE GRAND FINAL	WIN/NBN
9	DOMESTIC BLITZ	WIN/NBN
10	SEA PATROL II - THE COUP	WIN/NBN

Target	Generation X(1961-1975)	Market
Top 10	Description (grouped)	Channel \ Variable
1	STATE OF ORIGIN RUGBY LEAGUE NSW V QLD 3RD - MATCH	WIN/NBN
2	STATE OF ORIGIN RUGBY LEAGUE NSW V QLD 1ST - MATCH	WIN/NBN
3	STATE OF ORIGIN RUGBY LEAGUE QLD V NSW 2ND - MATCH	WIN/NBN
4	THE BIGGEST LOSER - FINALE	Southern Cross TEN
5	AUSTRALIAN IDOL - THE WINNER ANNOUNCED	Southern Cross TEN
6	PACKED TO THE RAFTERS	Prime/ 7QLD
7	RUGBY LEAGUE GRAND FINAL	WIN/NBN
8	THE 2008 MELBOURNE CUP CARNIVAL: MELBOURNE CUP-THE RACE	Prime/ 7QLD
9	SEVEN'S V8 SUPERCARS ROUND 10: BATHURST D3 THE RACE	Prime/ 7QLD
10	UNDERBELLY	WIN/NBN

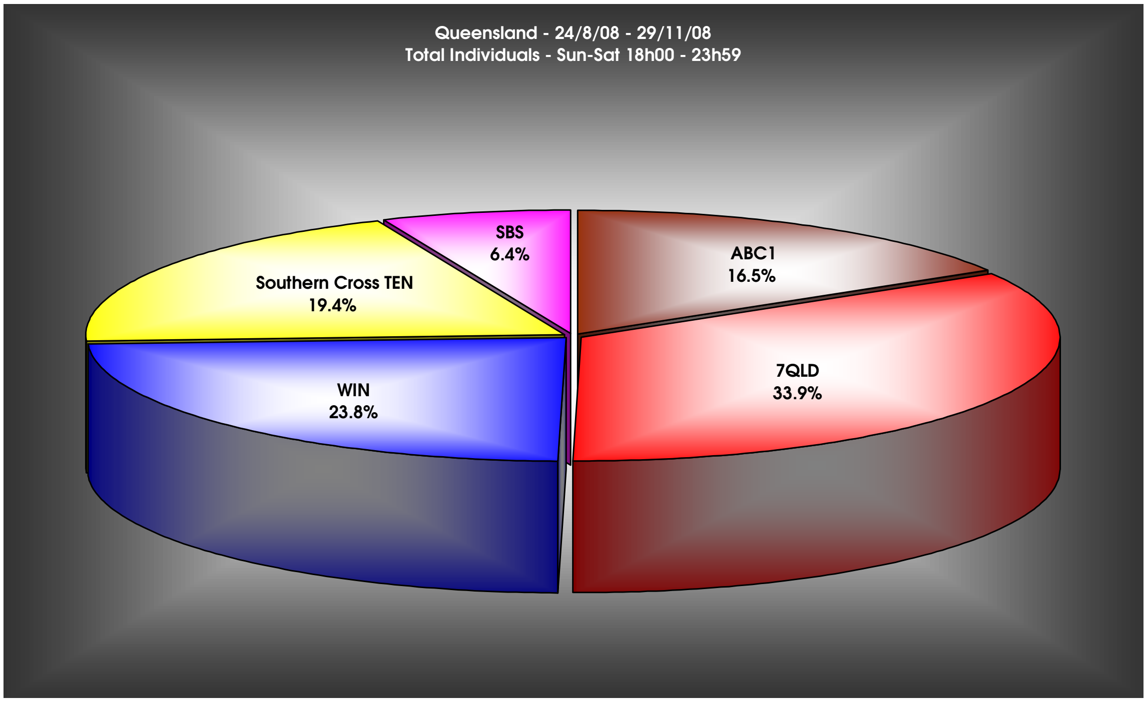
Target	Generation Y(1976-1990)	Market
Top 10	Description (grouped)	Channel \ Variable
1	STATE OF ORIGIN RUGBY LEAGUE NSW V QLD 3RD - MATCH	WIN/NBN
2	STATE OF ORIGIN RUGBY LEAGUE QLD V NSW 2ND - MATCH	WIN/NBN
3	STATE OF ORIGIN RUGBY LEAGUE NSW V QLD 1ST - MATCH	WIN/NBN
4	THE BIGGEST LOSER - FINALE	Southern Cross TEN
5	RUGBY LEAGUE GRAND FINAL	WIN/NBN
6	BIG BROTHER - PAMELA ANDERSON ENTERS THE HOUSE	Southern Cross TEN
7	AUSTRALIAN IDOL - AUDITION 1	Southern Cross TEN
8	BIG BROTHER - THE WINNER ANNOUNCED	Southern Cross TEN
9	MY NAME IS EARL - THU	Prime/ 7QLD
10	RUGBY LEAGUE GRAND FINAL PRESENTATION	WIN/NBN

Target	Generation Z(1991-2005)	Market
Top 10	Description (grouped)	Channel \ Variable
1	THE BIGGEST LOSER - FINALE	Southern Cross TEN
2	AUSTRALIAN IDOL - AUDITION 5	Southern Cross TEN
3	STATE OF ORIGIN RUGBY LEAGUE QLD V NSW 2ND - MATCH	WIN/NBN
4	STUART LITTLE 2 -RPT	WIN/NBN
5	RICHIE RICH -RPT	WIN/NBN
6	GLADIATORS	Prime/ 7QLD
7	BIG BROTHER - CARSON CRASHES BIG BROTHER'S CLOSET	Southern Cross TEN
8	STATE OF ORIGIN RUGBY LEAGUE NSW V QLD 1ST - MATCH	WIN/NBN
9	STATE OF ORIGIN RUGBY LEAGUE NSW V QLD 3RD - MATCH	WIN/NBN
10	HAMISH & ANDY RE-GIFTED	Southern Cross TEN

Target	Generation Next(2006-Present)	Market
Top 10	Description (grouped)	Channel \ Variable
1	THOMAS AND FRIENDS-AM	ABC1
2	LUNAR JIM-AM	ABC1
3	FIFI AND THE FLOWERTOTS-AM	ABC1
4	THE ADVENTURES OF GRACIE LOU-AM	ABC1
5	PINKY DINKY DOO-AM	ABC1
6	PLONSTERS-AM	ABC1
7	TODDWORLD-AM	ABC1
8	IN THE NIGHT GARDEN-AM	ABC1
9	DOROTHY THE DINOSAUR-AM	ABC1
10	THE KOALA BROTHERS-AM	ABC1

Source: Regional TAM surveys – summary surveys 1-10, 2008

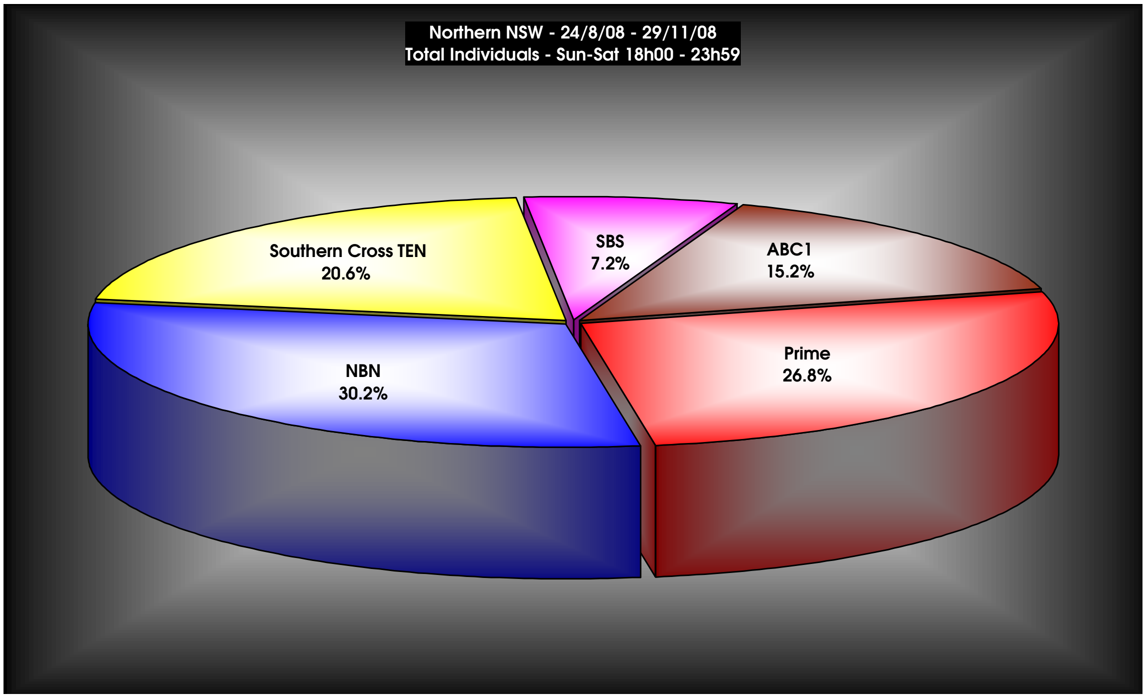
Highlights from Surveys 7-10, 2008 (excl Olympics), from Queensland



Top 20 Ranking programmes from Surveys 7-10, 2008 (excl Olympics)

Rank	Description (grouped)	Channel	'000s
1	RUGBY LEAGUE GRAND FINAL	WIN	279,424
2	RUGBY LEAGUE GRAND FINAL PRESENTATION	WIN	265,043
3	THE ZOO - TUE	7QLD	250,988
4	FIND MY FAMILY	7QLD	220,248
5	FIND MY FAMILY - REUNIONS	7QLD	219,329
6	PACKED TO THE RAFTERS	7QLD	215,245
7	RUGBY LEAGUE FINAL SERIES SF 2	WIN	209,051
8	RUGBY LEAGUE FINAL SERIES PF 1	WIN	208,214
9	MINDING YOUR MONEY - SEVEN NEWS SPECIAL	7QLD	204,808
10	RSPCA ANIMAL RESCUE	7QLD	201,744
11	SEVEN NEWS - SUN	7QLD	188,726
12	THE FORCE - BEHIND THE LINE	7QLD	188,144
13	BORDER SECURITY - AUSTRALIA'S FRONT LINE	7QLD	187,343
14	NEWS	7QLD	186,170
15	THE 2008 MELBOURNE CUP CARNIVAL: MELBOURNE CUP-THE RACE	7QLD	181,492
16	CITY HOMICIDE	7QLD	180,142
17	SEVEN'S BEIJING OLYMPICS: THE HEROES OF BEIJING	7QLD	178,455
18	RUGBY LEAGUE FINAL SERIES QF1	WIN	177,145
19	MEDICAL EMERGENCY	7QLD	176,786
20	SEVEN'S V8 SUPERCARS ROUND 10: BATHURST D3 THE RACE	7QLD	176,724

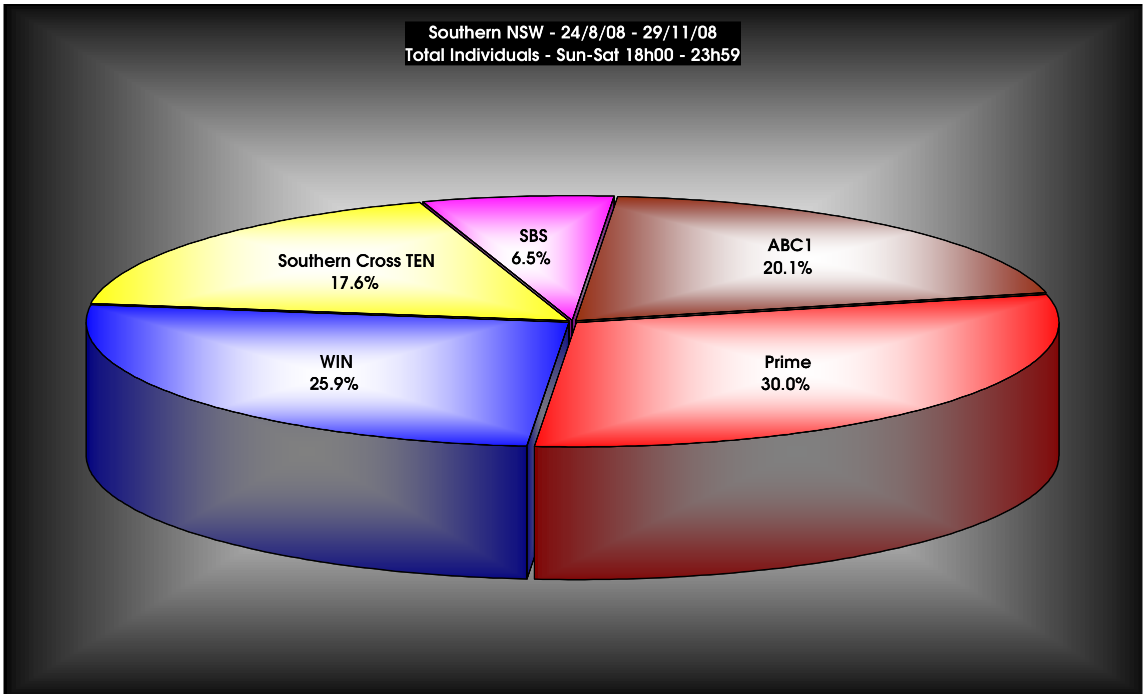
Highlights from Surveys 7-10, 2008 (excl Olympics), from Northern NSW



Top 20 Ranking programmes from Surveys 7-10, 2008 (excl Olympics)

Rank	Description (grouped)	Channel	'000s
1	RUGBY LEAGUE GRAND FINAL	NBN	365,110
2	RUGBY LEAGUE GRAND FINAL PRESENTATION	NBN	340,107
3	RUGBY LEAGUE FINAL SERIES PF 1	NBN	239,869
4	THE 2008 MELBOURNE CUP CARNIVAL: MELBOURNE CUP-THE RACE	Prime	228,405
5	DOMESTIC BLITZ	NBN	227,559
6	RUGBY LEAGUE GRAND FINAL ENTERTAINMENT	NBN	222,421
7	RUGBY LEAGUE FINAL SERIES PF 2	NBN	218,411
8	PACKED TO THE RAFTERS	Prime	209,083
9	FIND MY FAMILY	Prime	208,778
10	THE ZOO - TUE	Prime	208,418
11	RUGBY LEAGUE FINAL SERIES SF 2	NBN	206,436
12	RSPCA ANIMAL RESCUE	Prime	201,324
13	RUGBY LEAGUE FINAL SERIES SF 1	NBN	199,267
14	60 MINUTES	NBN	196,804
15	AUSTRALIAN IDOL - THE WINNER ANNOUNCED	SthX TEN	194,381
16	RUGBY LEAGUE FINAL SERIES QF 2	NBN	191,775
17	NATIONAL NEWS SUNDAY	NBN	191,483
18	AUSTRALIAN IDOL - THE FINAL VERDICT	SthX TEN	190,684
19	CITY HOMICIDE	Prime	187,020
20	DAVID ATTENBOROUGH'S WET N' WILD	NBN	186,658

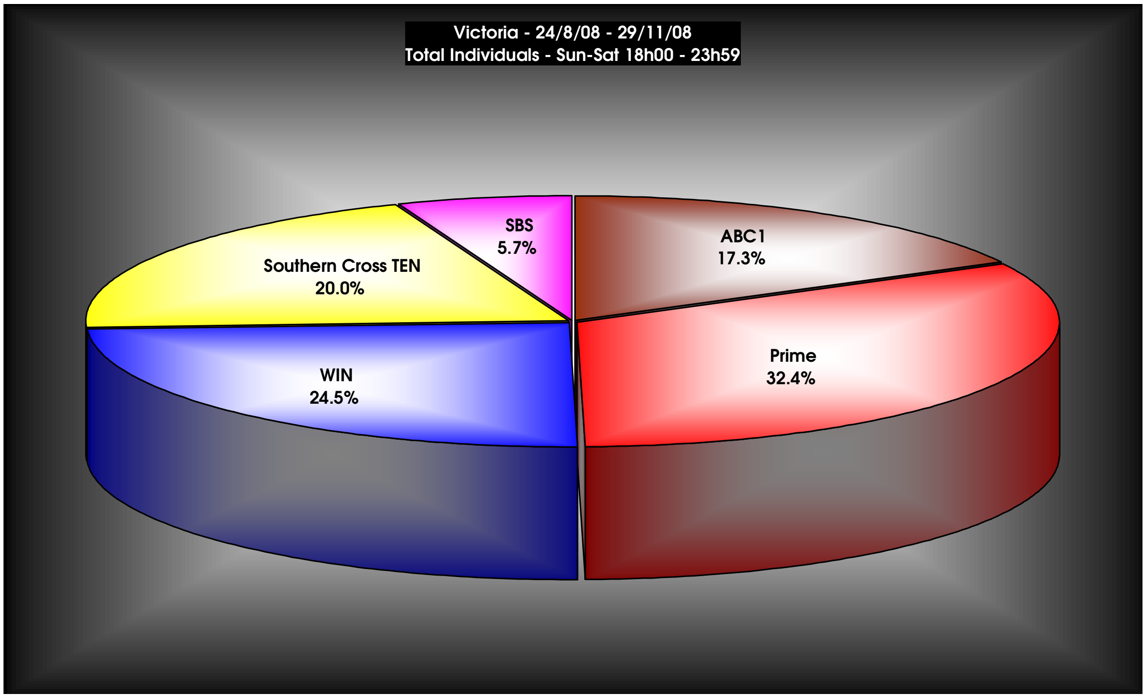
Highlights from Surveys 7-10, 2008 (excl Olympics), from Southern NSW



Top 20 Ranking programmes from Surveys 7-10, 2008 (excl Olympics)

Rank	Description (Grouped)	Channel	'000s
1	RUGBY LEAGUE GRAND FINAL	WIN	206,979
2	RUGBY LEAGUE FINAL SERIES QF1	WIN	183,408
3	PACKED TO THE RAFTERS	Prime	182,616
4	RUGBY LEAGUE GRAND FINAL PRESENTATION	WIN	177,825
5	RUGBY LEAGUE FINAL SERIES PF 2	WIN	175,051
6	RUGBY LEAGUE FINAL SERIES SF 2	WIN	174,000
7	AUSTRALIAN IDOL - THE WINNER ANNOUNCED	SthX TEN	169,676
8	RUGBY LEAGUE FINAL SERIES PF 1	WIN	168,430
9	CITY HOMICIDE	Prime	166,104
10	SEVEN'S V8 SUPERCARS ROUND 10: BATHURST D3 POST RACE	Prime	163,720
11	FIND MY FAMILY	Prime	163,675
12	RUGBY LEAGUE FINAL SERIES SF 1	WIN	163,245
13	AUSTRALIAN IDOL - THE FINAL VERDICT	SthX TEN	162,457
14	FIND MY FAMILY - REUNIONS	Prime	162,111
15	THE 2008 MELBOURNE CUP CARNIVAL: MELBOURNE CUP-THE RACE	Prime	157,180
16	CROCODILE DUNDEE -RPT	WIN	151,402
17	THE ZOO - TUE	Prime	151,397
18	THE PRIME MINISTER IS MISSING-EV	ABC1	149,940
19	RSPCA ANIMAL RESCUE	Prime	146,755
20	ALL SAINTS	Prime	145,045

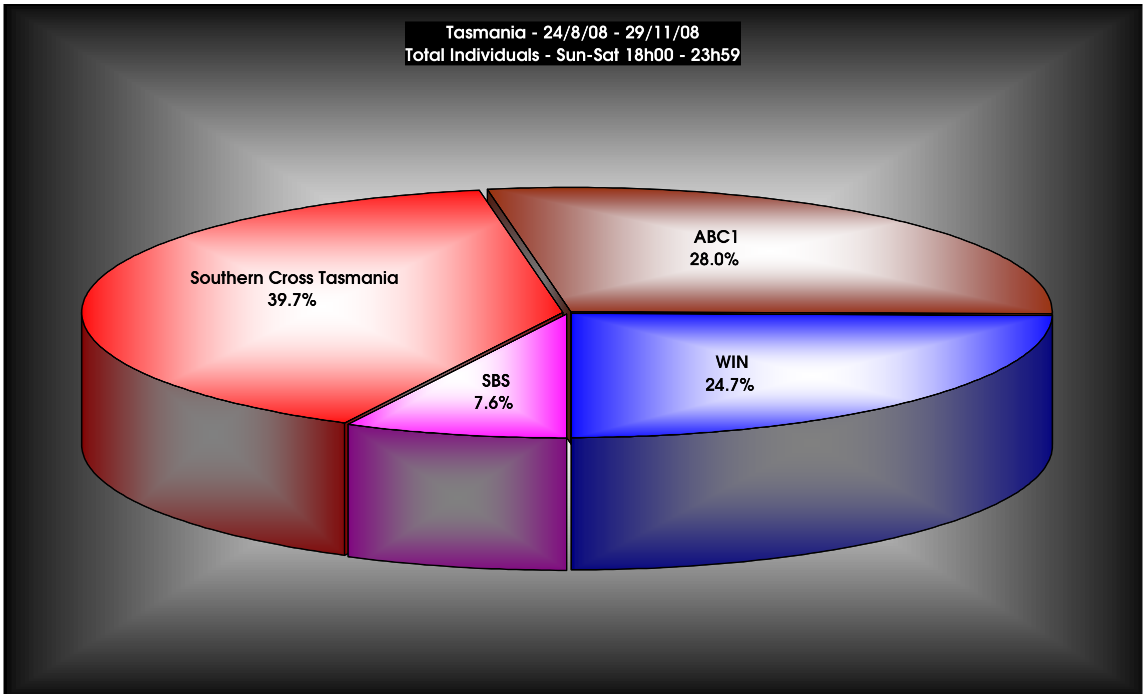
Highlights from Surveys 7-10, 2008 (excl Olympics), from Victoria



Top 20 Ranking programmes from Surveys 7-10, 2008 (excl Olympics)

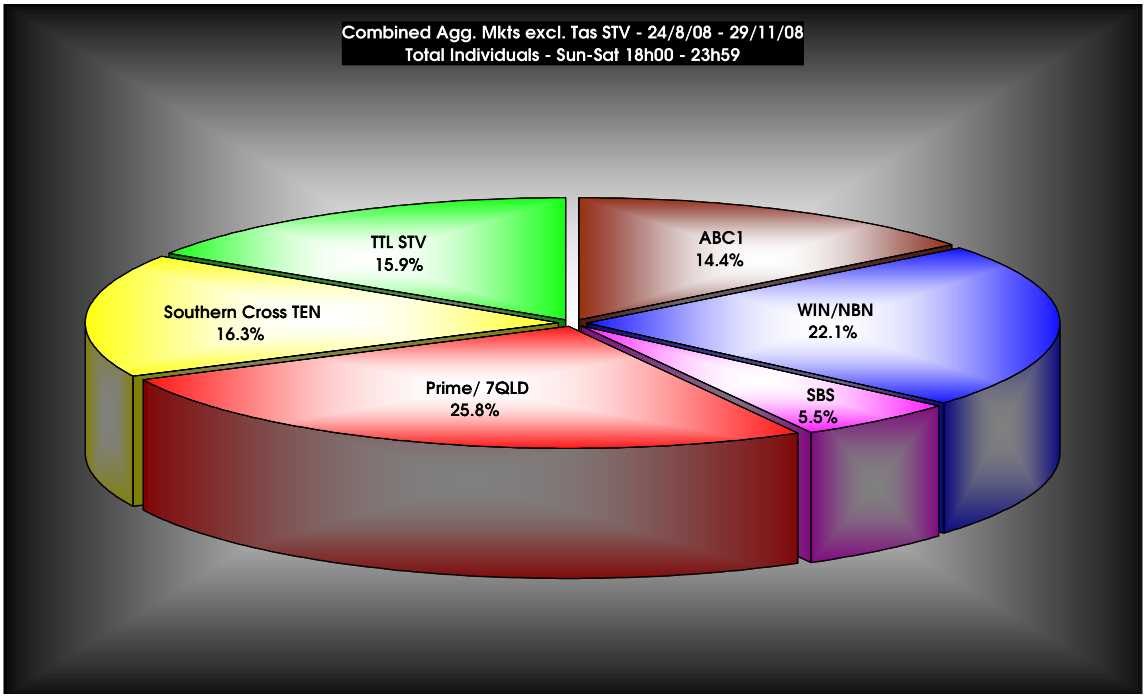
Rank	Description (grouped)	Channel	'000s
1	SEVEN'S AFL: GRAND FINAL - GEELONG VS HAWTHORN	Prime	296,578
2	SEVEN'S AFL: GRAND FINAL: PRESENTATIONS	Prime	285,349
3	THE 2008 MELBOURNE CUP CARNIVAL: MELBOURNE CUP-THE RACE	Prime	270,061
4	SEVEN'S AFL: GRAND FINAL: POST-MATCH	Prime	240,638
5	PACKED TO THE RAFTERS	Prime	206,323
6	2008 BROWNLOW MEDAL	SthX TEN	202,424
7	SEVEN'S AFL: GRAND FINAL PRE-MATCH ENTERTAINMENT	Prime	202,416
8	SEVEN'S AFL: PRELIMINARY FINAL 1: GEELONG VS WESTERN BULLDOGS	Prime	175,824
9	SEVEN'S AFL: QUALIFYING FINAL 2: HAWTHORN VS WESTERN BULLDOGS	Prime	172,812
10	TEN'S AFL FINALS 2008: 1ST SEMI FINAL ST KILDA V COLLINGWOOD	SthX TEN	170,937
11	FIND MY FAMILY	Prime	165,555
12	SEVEN'S AFL: SEMI-FINAL 2: WESTERN BULLDOGS VS SYDNEY	Prime	164,588
13	SEVEN'S AFL: QUALIFYING FINAL 1: GEELONG VS ST KILDA	Prime	161,644
14	TEN'S AFL FINALS 2008: 2ND PRELIM. FINAL HAWTHORN V ST KILDA	SthX TEN	159,615
15	THE 2008 MELBOURNE CUP CARNIVAL: MELBOURNE CUP-LATE	Prime	151,726
16	CITY HOMICIDE	Prime	148,774
17	ALL SAINTS	Prime	148,563
18	FIND MY FAMILY - REUNIONS	Prime	148,301
19	RSPCA ANIMAL RESCUE	Prime	146,037
20	THE ZOO - TUE	Prime	145,241

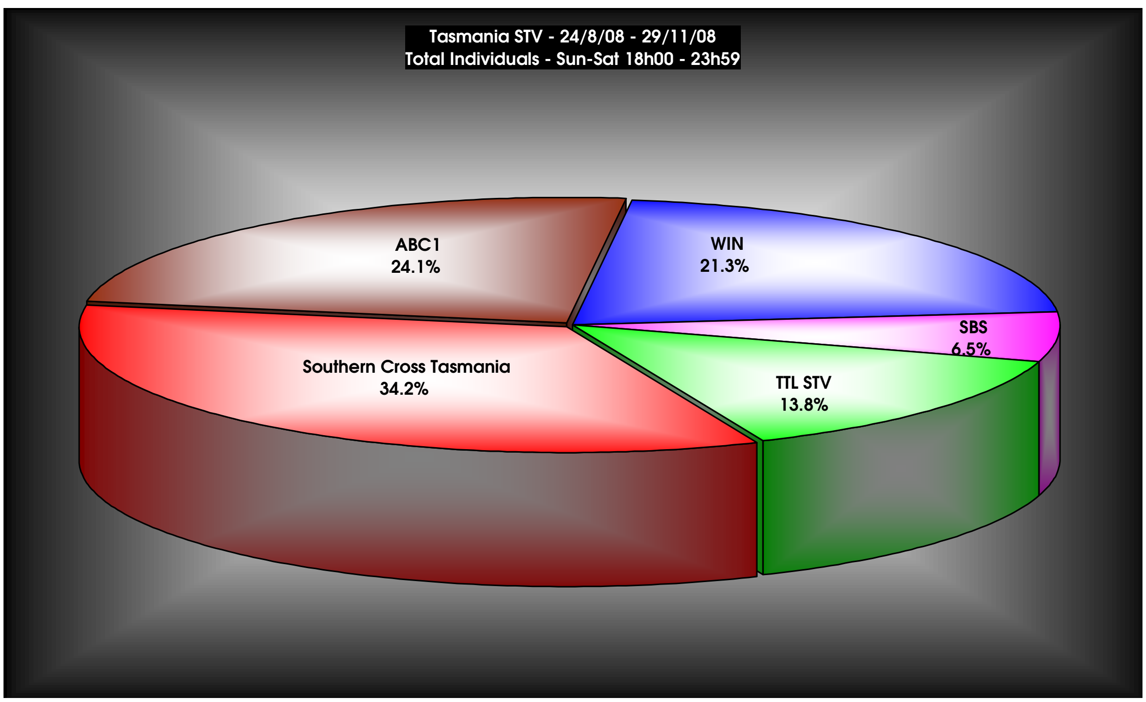
Highlights from Surveys 7-10, 2008 (excl Olympics), from Tasmania



Top 20 Ranking programmes from Surveys 7-10, 2008 (excl Olympics)

Rank	Description (grouped)	Channel	'000s
1	2008 AFL GRAND FINAL GEELONG V HAWTHORN	Southern Cross Tas	112,422
2	PACKED TO THE RAFTERS	Southern Cross Tas	101,914
3	NIGHTLY NEWS SUNDAY 2008	Southern Cross Tas	99,302
4	SEVEN'S BEIJING OLYMPICS: THE HEROES OF BEIJING	Southern Cross Tas	92,784
5	MIDSOMER MURDERS-EV	ABC1	91,418
6	DOCTOR WHO-EV	ABC1	89,862
7	ALL SAINTS	Southern Cross Tas	89,461
8	THE ZOO	Southern Cross Tas	87,476
9	FIND MY FAMILY	Southern Cross Tas	82,417
10	CITY HOMICIDE	Southern Cross Tas	81,570
11	RSPCA ANIMAL RESCUE	Southern Cross Tas	80,543
12	CRASH INVESTIGATIONS UNIT	Southern Cross Tas	79,343
13	AGATHA CHRISTIE: POIROT RPT	ABC1	78,967
14	THE PACIFIER	Southern Cross Tas	78,660
15	SPICKS AND SPECKS-EV	ABC1	76,495
16	HOME AND AWAY	Southern Cross Tas	76,186
17	TAGGART-EV	ABC1	76,109
18	MOUNTAIN WITH GRIFF RHYS JONES-EV	ABC1	75,835
19	THE PRIME MINISTER IS MISSING-EV	ABC1	74,971
20	AUSTRALIA'S NAUGHTIEST HOME VIDEO SHOW	WIN	74,781


Combined Agg. Mkts excl. Tas STV - 24/8/08 - 29/11/08
Total Individuals - Sun-Sat 18h00 - 23h59
TTL STV
15.9%
ABC1
14.4%
Southern Cross TEN
16.3%
WIN/NBN
22.1%
Prime/ 7QLD
25.8%
SBS
5.5%


Tasmania STV - 24/8/08 - 29/11/08
Total Individuals - Sun-Sat 18h00 - 23h59
ABC1
24.1%
WIN
21.3%
SBS
6.5%
Southern Cross Tasmania
34.2%
TTL STV
13.8%

Rank	Programme	Channel	Millions
1	THE X FACTOR (SAT 1920)	ITV1	11,280,000
2	THE X FACTOR RESULTS (SAT 2140)	ITV1	10,620,000
3	EASTENDERS (MON 2000)	BBC1	10,140,000
4	ANTIQUES ROADSHOW (SUN 1914)	BBC1	10,110,000
5	STRICTLY COME DANCING (SAT 1805)	BBC1	10,030,000
6	CHILDREN IN NEED 2008 (FRI 1900)	BBC1	9,830,000
7	CORONATION STREET (MON 1932)	ITV1	9,810,000
8	STRICTLY COME DANCING (SUN 2014)	BBC1	9,760,000
9	CORONATION STREET (MON 2029)	ITV1	9,760,000
10	CORONATION STREET (WED 1931)	ITV1	9,700,000
11	I'M A CELEBRITY - GET ME OUT OF HERE! (SUN 2102)	ITV1	9,380,000
12	EASTENDERS (THU 1929)	BBC1	8,890,000
13	CORONATION STREET (FRI 1933)	ITV1	8,090,000
14	WE ARE MOST AMUSED (SAT 2037)	ITV1	7,760,000
15	EASTENDERS (TUE 1930)	BBC1	7,610,000
16	TEN O'CLOCK NEWS (FRI 2201)	BBC1	7,120,000
17	TOP GEAR (SUN 1959)	BBC2	6,980,000
18	EMMERDALE (MON 1901)	ITV1	6,920,000
19	EMMERDALE (WED 1900)	ITV1	6,720,000
20	CORONATION STREET (FRI 2029)	ITV1	6,710,000

Source: www.barb.co.uk/ Terrestrial viewing summary - individuals 4+ (including timeshift) - w/e 16/11/2008

Snippets:

One in three West Country viewers still to switch all TV's to digital

More than a third of people in the West Country TV region still need to convert all their TVs from analogue to digital television ahead of switchover next year, according to figures released by Digital UK.

The research shows that 87% of viewers have already converted their main television set to digital, (up from 82% three months earlier) and 64% of people have converted all their sets (up from 53%).

Bill Taylor, Regional Manager for Digital UK in the South West, said: "We're making good progress in the run-up to switchover in the West Country, with almost nine in ten now watching digital. But it's important to remember that you'll need to convert every television in the house, and video recorders will also be affected."

Other findings from the research reveal that 88% of people understand what to do for switchover (up from 83%) and 87% of people are now aware of the 'digital tick' logo, which identifies equipment ready for the digital switchover.

During 2009, more than 100 transmitters in the West Country region will switch to fully digital signals—this includes all of Devon and Cornwall and parts of Somerset and West Dorset.

Digital TV Over 60% of people in the West TV region still don't know which year they will be switching to digital television, Digital UK have also announced.

Figures show that only 38% of viewers know that the switchover from analogue to digital television will take place during 2010 and 2011.

Source: www.dtg.org.uk

HD Freeview for London by 2010?

Londoners could be able to see Freeview in HD from 2010 after Ofcom outlined a proposal for a pilot scheme that could speed up the roll-out of HD services by two years.

Ofcom has launched a consultation, in response to a request from the BBC, to look at temporarily reassigning some spectrum frequencies to allow some high density population areas to receive Freeview HD TV more quickly than had been planned.

London, along with Tyne Tees and Ulster, had been lined up to receive Freeview HD services at the end of the phased roll-out of the enhanced broadcast technology in 2012 ahead of the London Olympics. Ofcom has looked at London as a "case study" as the most likely region for the accelerated roll-out of Freeview HD services, because it is "one of the metropolitan areas identified by the BBC and one of the most congested geographic areas".

Source: www.advanced-television.com

United Kingdom - Consultation opened on using temporary frequencies for HD/DTT

The communications regulator OFCOM has opened a consultation on the use of temporary UHF frequencies to allow for the launch of HD/DTT services prior to the completion of analogue switch-off.

Currently, HD/DTT services will be launched as analogue switch-off takes place in a given region. While viewers in the Granada TV region will be able to access HD/DTT services by the end of 2009, viewers in London will need to wait until 2012.

However, by using temporarily assigned frequencies, it will be possible to launch a multiplex offering HD services ahead of the digital switchover schedule.

The consultation document examines the possible frequency assignment framework within the temporary assignments could be made. London is used as a case-study.

The consultation closed on 19 November.

Source: www.digitag.org.uk

Ofcom:

The International Communications Market 2008 (November)

Foreword

This is Ofcom's third report on developments in international communications markets. Putting the UK market into an international context is becoming increasingly important, as communications service provision globalises and as technological innovation breaks down traditional national market boundaries.

This report sets out the availability, take-up and use of communications services among seven main comparator countries (the UK, France, Germany, Italy, the US, Canada and Japan). Where data are available, we have included a further five European countries (Poland, Spain, the Netherlands, Sweden and the Republic of Ireland). We also consider separately the development of communications markets in the large emerging economies of Brazil, Russia, India and China.

This year, we have put yet more emphasis on the importance of convergence by setting out a number of converging market themes. These demonstrate that as content and services are distributed to consumers over a variety of digital networks, and to many different devices, consumer behaviour towards communications services is changing – for example, their concurrent use of different media such as the internet and television. We have also included more time-series data this year on how, across our larger comparator countries, consumer attitudes towards communications services are evolving.

We are publishing this report to help fulfil our commitment to continually research markets, to inform our policy thinking and to fulfil the commitment we made in our 2008/09 annual plan. It complements the other research that has been published by Ofcom in 2008, and forms part of the Communications Market trilogy – together with The UK Communications Market (published in August 2008) and The Communications Market: Nations and Regions (May 2008).

Key points: Television

- The rate of migration to digital TV in 2007 resulted in the **UK having the highest proportion (86%) of main sets connected to digital,** (up from 77% in 2006), followed by the US (70%, up by nine pp on 2006), France (66%, up 13 pp) and Japan (65% up eight pp). In the Netherlands and Sweden analogue terrestrial TV has already been switched off.
- **Pay-TV take-up grew in 2007** across all comparator countries, reaching 47% of households in the UK (up 2 percentage points on 2006). Pay-TV take-up was highest in the Netherlands at 99% of main sets (up 0.1 percentage points year-on-year) and lowest in Italy (22%, up 3 percentage points).
- **An estimated 9 million subscribers paid for HD services across the UK, France, Germany, Italy, the US and Canada during 2007.** Subscribers in the US and Canada accounted for 87%, or 7.9 million of the total, with the UK responsible for over half of the remaining 1.2 million HD households.
- In the ten of our comparator countries where data were available, **an estimated 28million pay-TV households had a digital video recorder (DVR) in 2007**, up by 52% year-on-year. Three countries accounted for 96% of the total: the US (73%), the UK (13%) and France (10%). A greater proportion of

people in the UK have access to a DVR than in any other comparator country (30%).

- **Global television industry revenue reached an estimated £166bn in 2007** (of which £10.4bn was from the UK), up by 6% year-on-year. Advertising was the largest component, at £81bn, although for the first time, it didn't account for the majority of all television industry revenue Owing to strong growth in subscription revenue
- **Revenue per head was highest in the US, at £221 (up £8 year-on-year); it was lowest in Poland at £42 (up £6)**; in the UK it stood at £172 (up £7 during 2007).
- **Subscriptions drove revenue increases in many countries including the US, Poland, Canada and Japan, while growing advertising spend on television was also a driver in the Republic of Ireland, Sweden, The Netherlands and Spain**. In the UK, subscriptions accounted for 41% of revenue per head, against 34% from advertising and 25% from public funding.
- **Television's share of advertising spend fell in most countries profiled.** The TV markets in Canada and the UK experienced the largest share reductions, of 1.1 and 0.9 percentage points respectively.
- **The average audience share of European PSB channels across this study fell** by 2 percentage points in 2007, to 38%. This compares to a drop of 2 percentage points by the UK PSBs; which commanded an average share of 39%.
- **Viewers in the UK watched 3.6 hours of television a day**, slightly more than the average of 3.4 hours across the other European countries forming part of this report, but nearly an hour less a day than viewers in the US (4.5 hours).
- **Viewers in Japan (25%) and the UK (39%) were less likely to have concerns about television content** than viewers in France (54%), Germany (53%), the US (47%), Italy (46%) and Canada (43%).

Key points: Convergence

- **There is nearly one broadband connection for every four people** across the countries in this report. With 26 connections per 100 people, the UK is third among our comparator countries, behind the Netherlands (35%) and Sweden (31%). Average growth in connections between 2004 and 2007 was highest in the UK, France, Germany, the Netherlands, Sweden and Ireland, at 5% per year.
- **In the US, internet users in the US spend the most time online – 15 hours online each week; those in Spain spend the least amount of time online, at just 7.5 hours per week.** UK users rank second behind the US, at nearly 14 hours per week. Internet use per user has risen the fastest in the UK over the last four years, at an average annual rate of 30%.
- **The internet's share of advertising spend is highest in the UK** (19%) and Sweden (17%). The US, Canada and Japan are the only other countries where the internet makes up more than 10% of total advertising expenditure.**Concurrent media use, or stacking, is now common** across our comparator countries. Between 70% (Italy) and 83% (Japan) of

consumers across our comparator countries claim to access the internet while watching TV. In the UK the figure is 74%.

- **Viewing of TV shows over the web is growing rapidly.** US consumers download the most streams per head (26), with UK consumers next (8). Growth in the volume of downloads reached 131% in France during 2007, and 69% in the UK.
- **Broadcast TV viewing levels seem to be least affected by the internet in the US.** In the US, broadcast-based TV viewing appears more resilient to internet access than anywhere else - the net percentage of US people viewing less broadcast-based TV since having internet access is 7%, whereas in all the other countries in our survey the figure was between 15% and 21%; in the UK it was 15%.
- **Mobile broadband availability using HSDPA technology now exceeds 70% in many European countries, prompting operators to develop residential mobile broadband services, enabled by** plug-in `dongles' for laptops. HSDPA availability is highest in the UK (87%).
- Digital recorded music sales grew by over 20% year-on-year in all our comparator countries except France and Italy. **Mobile music downloads now account for over half of all recorded digital music revenue in France, Italy and Japan.** In Japan, mobile accounts for over 90% of all digital music revenue, compared to 29% for the UK.
- **Mobile social networking is beginning to grow in popularity** – 0.8 million mobile subscribers in the UK and 4 million in the US access social networking sites using their phones, thanks to improving handset capabilities, faster network speeds and bespoke SNS mobile applications.
- **Broadcast mobile television has had a mixed year.** Italy is the biggest market in Europe with nearly 1 million DVB-H subscribers, though there have been service closures elsewhere

Full report is available on http://www.ofcom.org.uk/research/cm/icmr08/

Season-to-Date by Viewers

2008 - 2009 Season Through November 16, 2008

Rank	Program Name	Net	Day	Time	Total Viewers	Total no. of Episodes
1	CSI	CBS	Thu	9:00 PM	21,114,000	6
2	DANCING WITH THE STARS	ABC	Mon	8:00 PM	19,340,000	8
3	NCIS	CBS	Tue	8:00 PM	18,650,000	7
4	GREY'S ANATOMY-THU 9PM	ABC	Thu	9:00 PM	17,697,000	7
5	DESPERATE HOUSEWIVES	ABC	Sun	9:00 PM	17,281,000	8
6	THE MENTALIST	CBS	Tue	9:00 PM	16,735,000	6
7	NBC SUNDAY NIGHT FOOTBALL	NBC	Sun	8:23 PM	16,731,000	10
8	DANCING W/STARS RESULTS	ABC	Tue	9:00 PM	16,495,000	5
9	CRIMINAL MINDS	CBS	Wed	9:00 PM	16,161,000	7
10	60 MINUTES	CBS	Sun	VAR	15,750,000	8
11	CSI: MIAMI	CBS	Mon	10:00 PM	14,584,000	8
12	TWO AND A HALF MEN	CBS	Mon	9:00 PM	14,571,000	8
13	CSI: NY	CBS	Wed	10:00 PM	14,519,000	7
14	HOUSE	FOX	Tue	8:00 PM	13,974,000	8
15	SURVIVOR: GABON	CBS	Thu	8:00 PM	13,628,000	8
16	WITHOUT A TRACE	CBS	Tue	10:00 PM	12,681,000	6
17	COLD CASE	CBS	Sun	VAR	12,154,000	8
18	ELEVENTH HOUR	CBS	Thu	10:01 PM	12,057,000	6
19	THE OT	FOX	Sun	VAR	11,678,000	5
20	EXTREME MAKEOVER:HM ED-8P	ABC	Sun	8:00 PM	11,570,000	8

Source: Zapa2it.com

Snippets

HDTV sets in a third of US homes

Consumer research from Leichtman Research Group has found that 34 per cent of households in the US have at least one high definition television (HDTV) set – approximately double the percentage of households that had an HDTV set two years ago.

The growth of HDTV sets was largely driven by on-going consumer purchasing of TV sets coupled with a dwindling supply of lower-end non-HDTV sets being sold. Overall, 22 per cent of all households purchased a new TV set in the past 12 months, with 43 per cent of this group spending over $1,000 on a new TV.

Source: www.advanced-television.com