

TELEVISION RATINGS REPORT

Survey Year 2011

Introduction

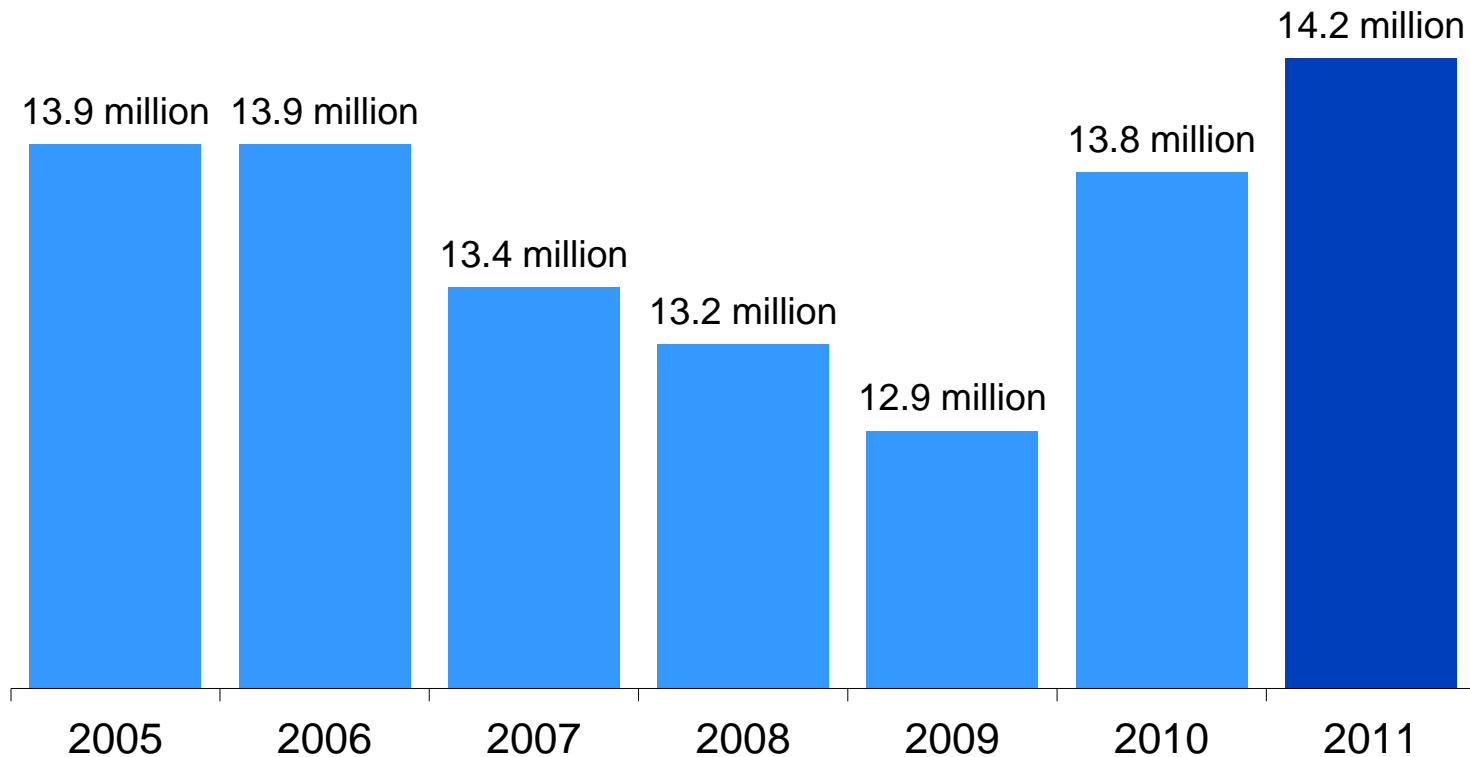
A review of the official ratings for the 2011 survey year shows more people are watching commercial free-to-air television (Free TV):

- Free TV's average daily reach has hit a 7-year high
- Free TV's average audiences have increased across all key demographics
- Free TV has seen increases in both daily and nightly share of viewing
- Every one of the top 40 programs on Free TV this year attracted audiences of over 2 million viewers each
- And time-shifting continues to drive incremental viewing.

Free TV's reach hits a 7-year high

Every day, 14.2 million Australians tune into commercial free-to-air television. Free TV's must-watch programming and the new channels are driving the increase in viewing.

Free TV's Average Daily Reach – YOY Comparison – Metro & Regional



Source: OzTAM and RegionalTAM, 5 cap cities and 5 aggregated regional markets (incl Tas), metro and regional are combined to form a national estimate, survey weeks 7-48 2005 – 2011 ex Easter, 2am-2am, total commercial TV (excl spill), total ppl, average daily reach, figures have been rounded to nearest hundred thousand, 2010 and 2011 is based on consolidated data.

Free TV's average audiences are on the rise

Free TV's audience increases have increased across all key demographics in both metro and regional markets. In the all important grocery buyer demographic, audiences in primetime increased by 5.7 per cent in metro markets and 12.8 per cent in regional.

Free TV's Average Audience Increases – Survey Year 2011 vs 2010

		Metro	Regional
2am - 2am	Total People	3.9%	8.6%
	Ppl 18-24	3.0%	13.4%
	Ppl 25-39	3.1%	9.0%
	Ppl 40-54	4.8%	8.1%
	Ppl 55+	4.7%	9.6%
	Grocery Buyers	4.3%	10.1%
	OG1	8.1%	8.9%
6pm - Midnight	Total People	4.5%	11.2%
	Ppl 18-24	5.0%	16.9%
	Ppl 25-39	3.4%	11.1%
	Ppl 40-54	4.4%	10.2%
	Ppl 55+	6.8%	13.9%
	Grocery Buyers	5.7%	12.8%
	OG1	8.1%	13.9%

Free TV is garnering a bigger share of viewing

Free TV's share of viewing also continues to build across the day and in primetime. In 2011, Free TV accounted for a 66.8 per cent of metro nightly viewing, and 67.3 per cent of regional viewing.

Share of Television Viewing – Survey YTD Comparison

		Metro			Regional		
		2009	2010	2011	2009	2010	2011
2am - 2am	Free TV	60.4%	60.2%	60.6%	57.4%	59.4%	61.0%
	ABC & SBS	16.6%	17.1%	16.7%	18.5%	17.9%	17.8%
	Pay TV	22.6%	22.4%	22.6%	24.1%	22.8%	21.1%
6pm - Midnight	Free TV	65.0%	65.8%	66.8%	62.2%	64.8%	67.3%
	ABC & SBS	18.8%	18.3%	17.3%	20.7%	18.8%	17.4%
	Pay TV	15.9%	15.5%	15.8%	17.1%	16.4%	15.3%

Free TV channels dominate viewing

Free TV channels garner the greatest share of viewing during the day and in prime-time. The new channels now collectively garner 16 per cent of prime-time metro viewing.

Share of Television Viewing – By Channel

2am - 2am				6pm - Midnight			
Metro		Regional		Metro		Regional	
Seven	16.8%	Prime/7QLD	17.6%	Seven	18.7%	Prime/7QLD	19.3%
Nine	14.2%	WIN/NBN	16.0%	Nine	16.0%	WIN/NBN	18.2%
Ten	11.7%	Sthrn Cross TEN	9.8%	Ten	12.9%	Sthrn Cross TEN	11.2%
ABC1	7.5%	ABC1	7.4%	ABC1	10.0%	ABC1	9.5%
ABC2	3.9%	ABC2	4.1%	SBS ONE	3.7%	7TWO	4.5%
ELEVEN	3.3%	7TWO	3.6%	7TWO	3.7%	SBS ONE	3.8%
GO!	3.1%	GO!	3.5%	GO!	3.3%	GO!	3.7%
7TWO	3.0%	ELEVEN	3.4%	ELEVEN	2.9%	7mate	3.3%
SBS ONE	2.8%	7mate	3.0%	7mate	2.8%	ELEVEN	2.9%
7mate	2.4%	SBS ONE	2.7%	Gem	2.2%	Gem	2.5%
Gem	2.2%	Gem	2.7%	ABC2	1.8%	ABC2	1.8%
ONE	1.6%	ABC3	1.7%	ONE	1.7%	ONE	1.7%
ABC3	1.1%	ONE	1.6%	Fox Sports 2	0.7%	Fox Sports 2	1.0%
FOX8	1.0%	ABC News 24	1.5%	Fox Sports 3	0.7%	ABC3	0.9%
ABC News 24	0.9%	Fox Sports 2	1.0%	Fox Sports 1	0.7%	ABC News 24	0.7%
Fox Sports 1	0.8%	Fox8	0.8%	Fox8	0.7%	SBS TWO	0.7%
Fox Sports 2	0.8%	TV1	0.7%	SBS TWO	0.6%	Fox8	0.6%
Fox Sports 3	0.7%	Fox Sports 3	0.7%	Lifestyle	0.6%	Fox Sports 3	0.6%
Lifestyle	0.7%	C&I	0.6%	UKTV	0.6%	TV1	0.5%
TV1	0.7%	Disney	0.6%	ABC News 24	0.6%	Lifestyle	0.5%
UKTV	0.7%	Lifestyle	0.6%	ABC3	0.5%	Fox Classics	0.5%
Sky News	0.6%	Sky News	0.6%	TV1	0.5%	UKTV	0.4%
C&I	0.6%	Fox Sports 1	0.5%	Fox Classics	0.4%	Fox Sports 1	0.4%
Disney	0.6%	Fox Classics	0.5%	C&I	0.4%	C&I	0.4%
Nick Jr.	0.5%	History	0.5%	111 Hits	0.3%	History	0.4%
Nickelodeon	0.5%	UKTV	0.5%	Bio.	0.3%	W	0.4%
111 Hits	0.5%	13Th Street	0.5%	13Th Street	0.3%	13Th Street	0.3%
Fox Classics	0.5%	SBS TWO	0.5%	Lifestyle Food	0.3%	Disney	0.3%
Bio.	0.4%	W	0.4%	Comedy	0.3%	111 Hits	0.3%
13Th Street	0.4%	111 Hits	0.4%	History	0.3%	Sky News	0.3%
SBS TWO	0.4%	Bio.	0.4%	Showtime Premier	0.3%	Bio.	0.3%
Disney Junior	0.4%	Cartoon Network	0.4%	W	0.3%	Showtime Premier	0.3%

Source: OzTAM and RegionalTAM, 5 cap cities and 4 aggregated regional markets (excludes Tas), survey weeks 7-48 2011, consolidated data, total ppl.

Free TV shows consistently deliver big numbers

Everyone of the top 40 programs on Free TV this year delivered an average combined audience in excess of 2.2 million viewers.

TOP PROGRAMS - OVERALL		
1	THE BLOCK -WINNER ANNOUNCED	4,629,000
2	AUSTRALIA'S GOT TALENT-WINNER ANNOUNCED	4,000,000
3	THE BLOCK -AUCTION	3,819,000
4	STATE OF ORIGIN QLD V NSW 3RD - MATCH	3,760,000
5	UNDERBELLY: RAZOR -EP1	3,742,000
6	MELBOURNE CUP-THE RACE	3,624,000
7	MASTERCHEF - WINNER ANNOUNCED	3,499,000
8	STATE OF ORIGIN QLD V NSW 1ST - MATCH	3,495,000
9	AFL GRAND FINAL COLLINGWOOD V GEELONG	3,430,000
10	STATE OF ORIGIN NSW V QLD 2ND - MATCH	3,388,000
11	RUGBY LEAGUE GRAND FINAL	3,313,000
12	THE BLOCK -GRAND FINAL	3,212,000
13	UNDERBELLY: RAZOR -EP2	3,157,000
14	MASTERCHEF - FINALE NIGHT	3,094,000
15	THE X FACTOR - THE WINNER ANNOUNCED	3,042,000
16	MY KITCHEN RULES-WINNER ANNOUNCED	3,001,000
17	AUSTRALIA'S GOT TALENT-TUE	2,723,000
18	MELBOURNE CUP-RACE PRESENTATION	2,691,000
19	DOWNTON ABBEY	2,621,000
20	PACKED TO THE RAFTERS	2,615,000

TOP PROGRAMS - OVERALL		
21	1 DAY CRICKET -AUS V ENGLAND G1 S2	2,567,000
22	OPRAH'S ULTIMATE AUSTRALIAN ADVENTURE	2,497,000
23	WILLIAM AND KATE - ROYAL WEDDING-EVENING	2,495,000
24	THE 2011 GRAND FINAL PRE GAME	2,470,000
25	STATE OF ORIGIN QLD V NSW 3RD - POST MATCH	2,458,000
26	2011 GRAND FINAL POST MATCH PRESENTATION	2,449,000
27	WILLIAM & KATE - WEDDING-FAMILY ARRIVAL	2,413,000
28	THE X FACTOR AUDITIONS-TUE	2,379,000
29	THE BLOCK - SUN	2,364,000
30	TENNIS: 2011 AUST OPEN - WOMEN'S FINAL	2,348,000
31	THE BIGGEST LOSER FAMILIES - FINALE NIGHT	2,347,000
32	STATE OF ORIGIN QLD V NSW 1ST - PRE MATCH	2,338,000
33	MELBOURNE CUP-THE MOUNTING YARD	2,317,000
34	OPRAH'S ULTIMATE AUSTRALIAN ADVENTURE P2	2,302,000
35	MASTERCHEF AUSTRALIA - TOP 50 MON	2,297,000
36	STATE OF ORIGIN QLD V NSW 3RD - PRE MATCH	2,294,000
37	2011 AUST OPEN - WOMEN'S FINAL PRES	2,266,000
38	WORLD CUP: SF2 NEW ZEALAND VS. AUSTRALIA	2,265,000
39	MASTERCHEF AUSTRALIA MON	2,259,000
40	CELEBRITY APPRENTICE - WINNER ANNOUNCED	2,225,000

Source: OzTAM and RegionalTAM, 5 cap cities and 4 aggregated regional markets (excludes Tas), weeks 1-48 2011, consolidated data, Free TV only, metro and regional audiences are added to form a combined average audience estimate and ranking, based on program title matches, program results represent an average of all times aired during the period (ex sneak peeks).

Time-shifting driving incremental audiences

PVR viewing is delivering significant incremental audiences with hit drama driving incremental audiences of up to 334,000.

Top Time Shifted Programs (based on average audience increase)

Rank	Program	Preliminary Overnight	Consolidated	% Increase	Audience Increase
1	UNDERBELLY: RAZOR -EP1	3,408,000	3,742,000	9.8	334,000
2	UNDERBELLY: RAZOR -EP2	2,831,000	3,157,000	11.5	326,000
3	DOWNTON ABBEY	2,343,000	2,621,000	11.9	278,000
4	UNDERBELLY: RAZOR	1,925,000	2,150,000	11.7	225,000
5	PACKED TO THE RAFTERS	2,398,000	2,615,000	9.0	217,000
6	THE AMAZING RACE-19-EP.2	497,000	713,000	43.5	216,000
7	TERRA NOVA	1,167,000	1,369,000	17.3	202,000
8	TERRA NOVA EP 2	1,615,000	1,814,000	12.3	199,000
9	UNDERBELLY FILES: TELL THEM LUCIFER WAS HERE	1,876,000	2,067,000	10.2	191,000
10	WINNERS & LOSERS	1,852,000	2,041,000	10.2	189,000
11	BODY OF PROOF-EP.2	1,121,000	1,308,000	16.7	187,000
12	SURVIVOR: SOUTH PACIFIC EP2	428,000	615,000	43.7	187,000
13	BODY OF PROOF	1,252,000	1,436,000	14.7	184,000
14	HAWAII FIVE-O EP 2	766,000	948,000	23.8	182,000
15	UNDERBELLY FILES: INFILTRATION	1,553,000	1,734,000	11.7	181,000
16	HAWAII FIVE-O WED	717,000	890,000	24.1	173,000
17	OFFSPRING WED	1,248,000	1,421,000	13.9	173,000
18	GLEE WED	1,110,000	1,280,000	15.3	170,000
19	BODY OF PROOF-MON	1,078,000	1,242,000	15.2	164,000
20	NCIS EP 2	1,554,000	1,718,000	10.6	164,000

Source: OzTAM and RegionalTAM, 5 cap cities and 4 aggregated regional markets (ex Tas), weeks 1-48 2011, consolidated data, Free TV only, metro and regional audiences are added to form a combined average audience estimate, based on program title matches, program results represent an average of all times aired during the period (ex sneak peeks) and are ranked based on average audience increase.