

FREE TV RATINGS UPDATE

Survey Year-to-Date

As @ end Survey 7, 2010

Introduction

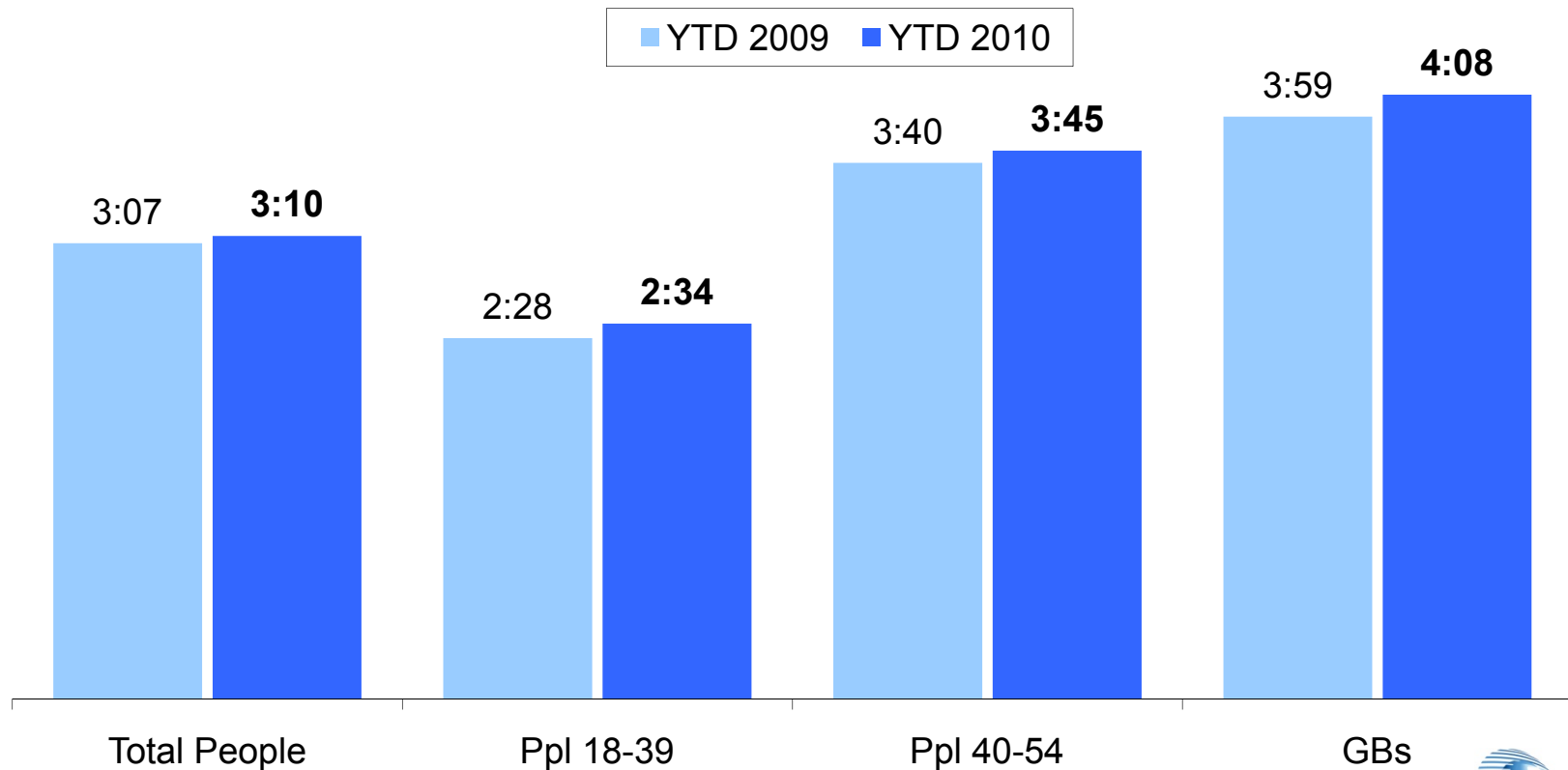
Commercial free-to-air television is going from strength-to-strength in 2010, with the latest survey results revealing significant increases across several key measures including:

- ↑ Time spent watching television – up on last year
- ↑ Share of evening viewing – up on last year
- ↑ Average daily reach – a four-year high
- ↑ Average audience increases – up across all major demographics.
- ↑ Time-shifted viewing adding incremental audiences.

Australians are watching more TV in 2010

Despite the plethora of entertainment and media options now available to consumers, TV consumption is on the rise. Daily metro TV viewing has increased to 3 hours and 10 minutes in 2010 (up from 3 hours and 7 minutes for the same period last year).

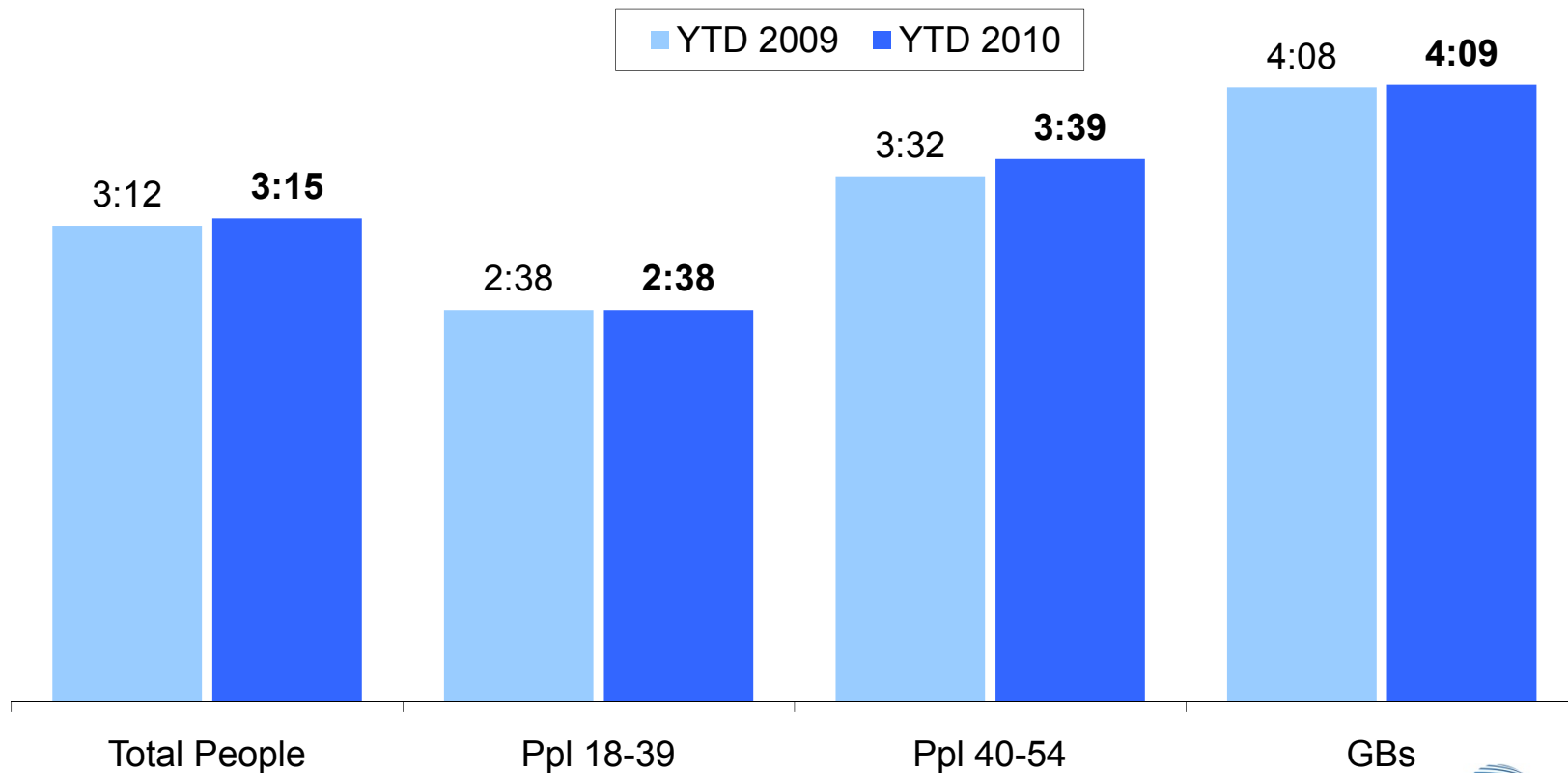
Daily Time Spent Viewing – All TV – Survey YTD Comparisons - Metro



Regional television viewing is up too

Regional television viewing is also up in 2010, with regional-based viewers watching 3 hours and 15 minutes of television a day.

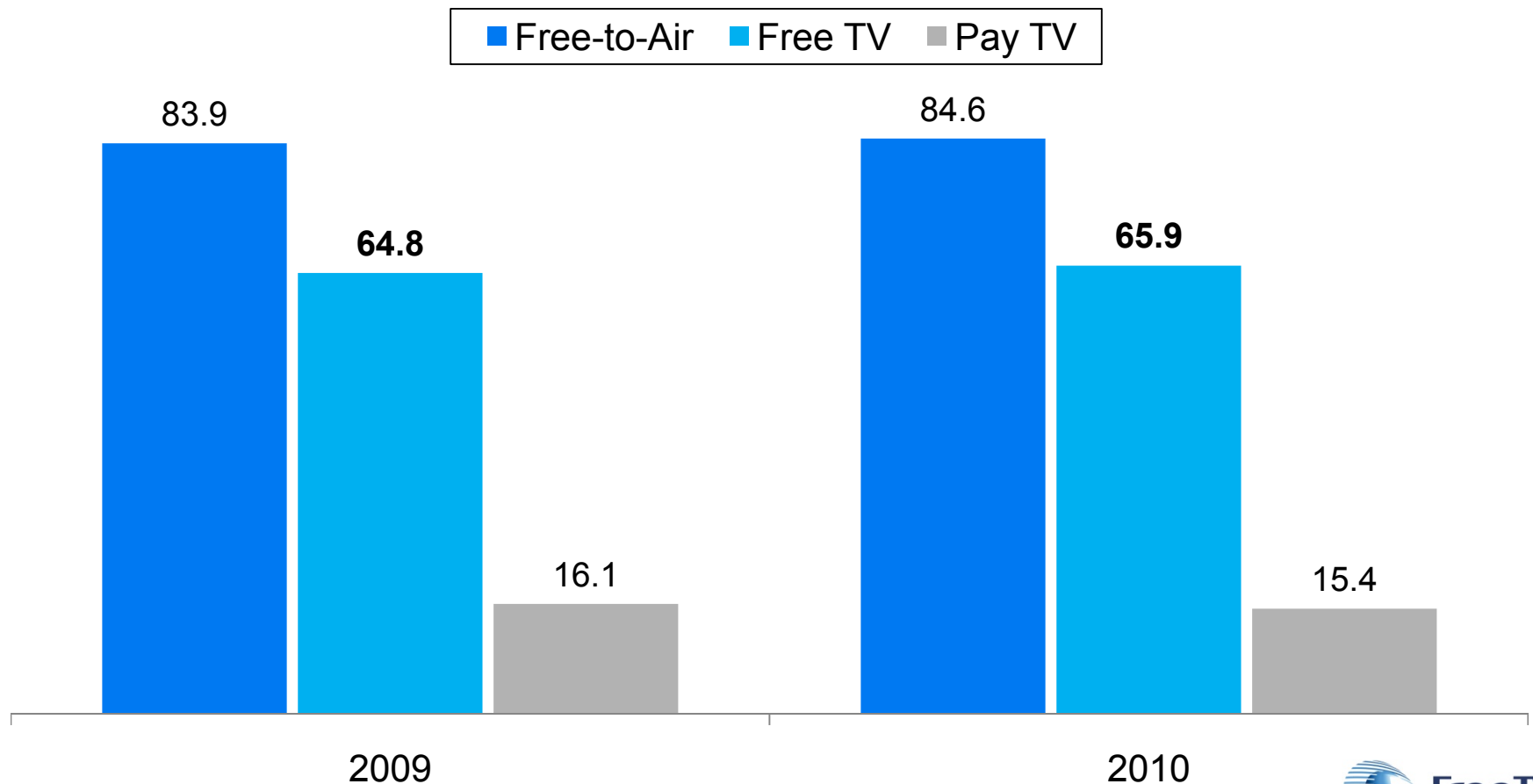
Daily Time Spent Viewing – All TV – Survey YTD Comparisons - Regional



Free TV's share of evening viewing is up

Free TV's digital multi-channels are driving viewing. So far this year, Free TV's metro evening share has increased from 64.8 to 65.9 per cent. Pay TV's share is down YOY.

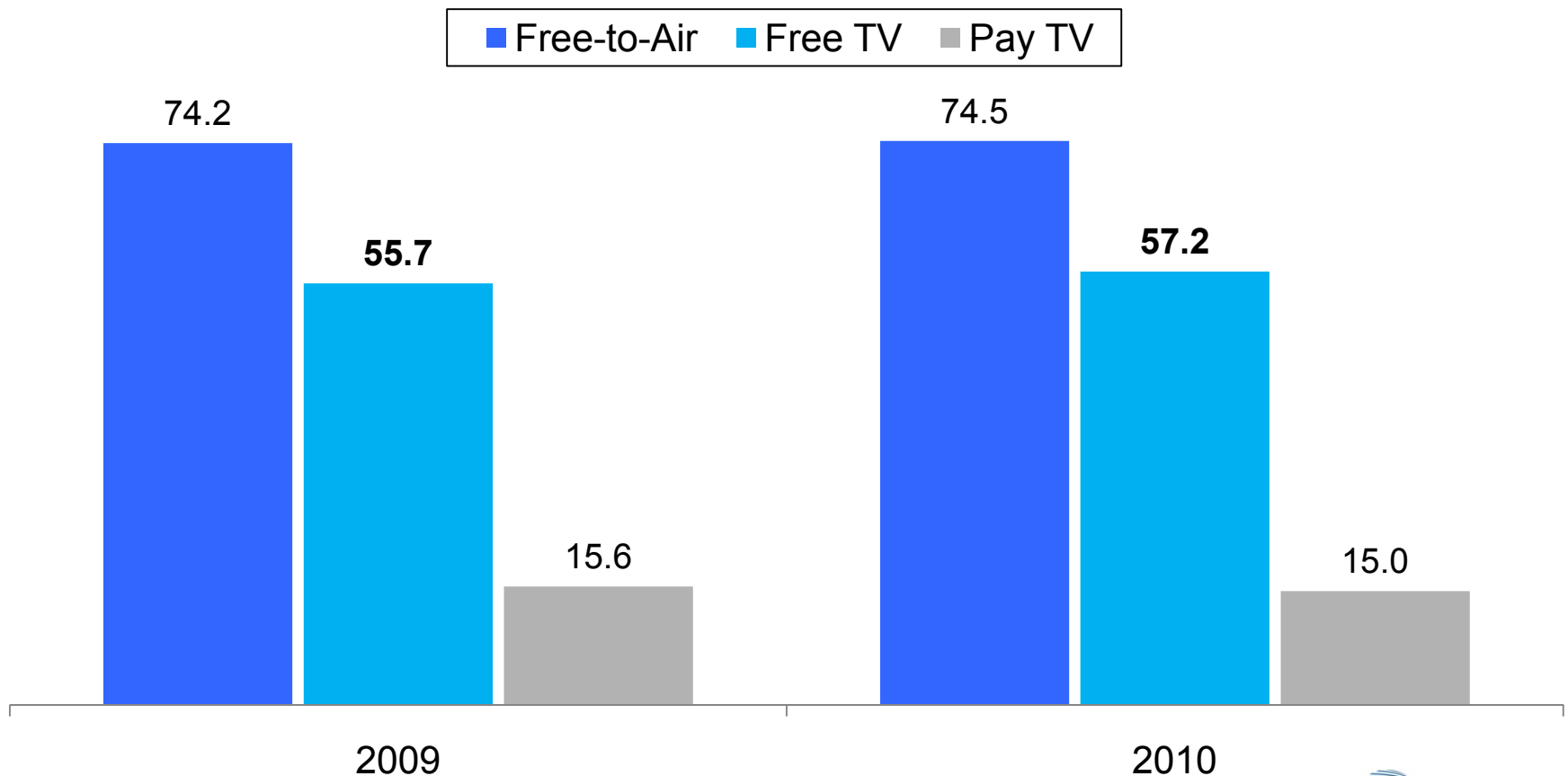
% Share of Viewing – 6pm to midnight – Survey YOY Comparisons - Metro



Free TV's regional prime-time share is up

Free TV's nightly share of viewing in regional markets has increased from 55.7 per cent in 2009 to 57.2 per cent in 2010. Pay TV's share is also down YOY in regional markets.

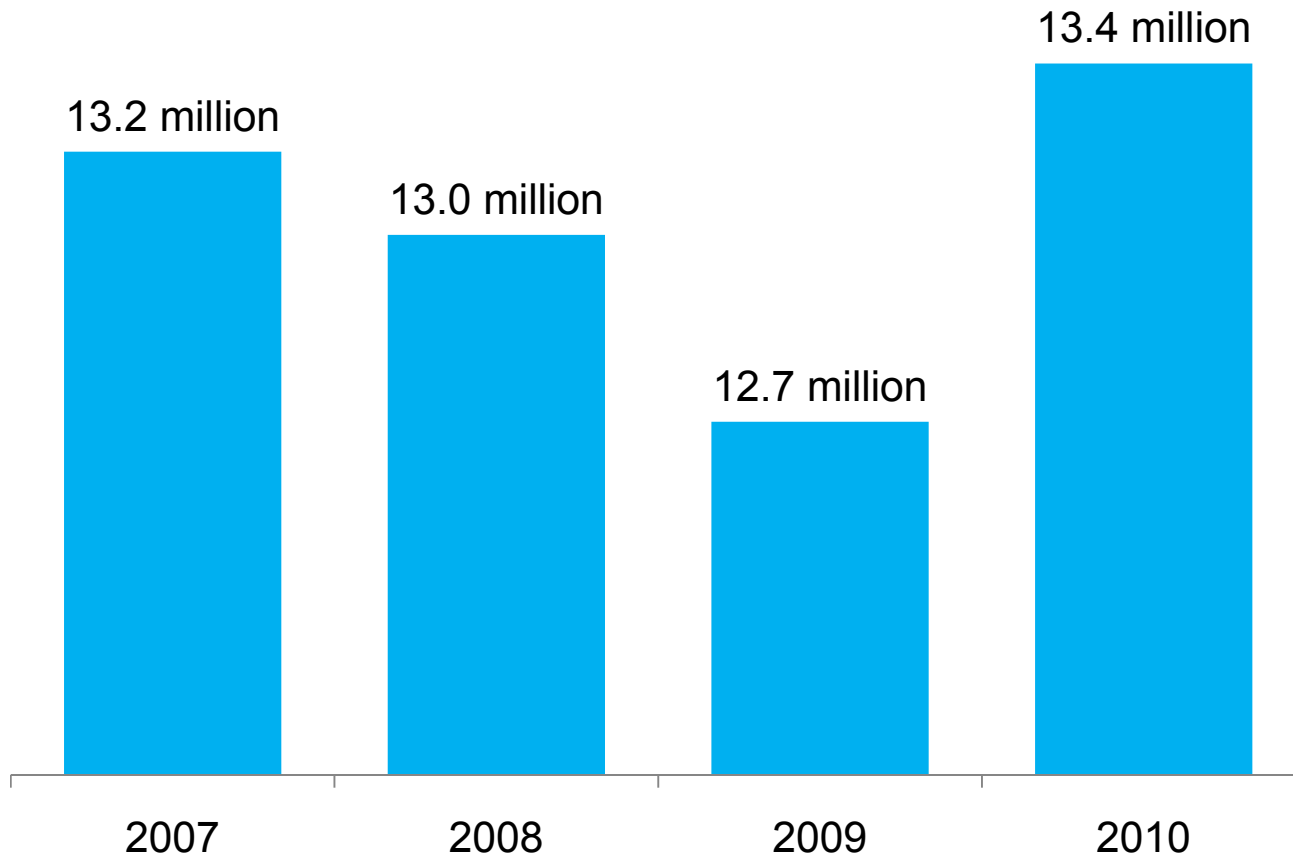
% Share of Viewing – 6pm to midnight – Survey YOY Comparisons - Regional



Free TV's reach has hit a 4-year high

Free TV's average daily reach remains unrivalled and has hit a four-year high in 2010. More than 13.4 million Australians are tuning in to commercial free-to-air television every day – this is up from 12.7 million for the same period last year.

Free TV's Average Daily Reach - Survey YTD Comparisons



Free TV's audiences are up across key demos

Free TV is seeing average audience increases across key demographics in both metro and regional markets across the day and during prime-time.

Average Audiences – Survey YTD Comparisons – Free TV & Pay TV

		Free TV		Pay TV	
		Metro	Regional	Metro Pay TV	National Pay TV
2am - 2am	Total Ppl	4.0%	5.3%	1.8%	-4.3%
	Ppl 18-24	0.1%	-7.9%	16.2%	-2.8%
	Ppl 25-39	5.2%	5.5%	12.4%	1.7%
	Ppl 40-54	3.1%	8.7%	2.1%	-6.8%
	Ppl 55+	7.6%	7.6%	-5.7%	-5.2%
	GB	7.1%	5.7%	2.7%	-4.1%
	GB w Kids	3.9%	7.4%	6.9%	-3.3%
	Ppl OG1	7.5%	18.0%	-1.4%	-5.3%
6pm - Midnight	Total Ppl	5.9%	5.7%	-0.2%	-5.4%
	Ppl 18-24	0.8%	-7.7%	16.1%	-2.2%
	Ppl 25-39	8.3%	6.0%	10.0%	2.1%
	Ppl 40-54	4.7%	9.4%	-3.4%	-10.9%
	Ppl 55+	9.4%	9.0%	-6.8%	-5.1%
	GB	8.4%	6.2%	-1.3%	-6.1%
	GB w Kids	5.0%	9.7%	3.1%	-4.9%
	Ppl OG1	8.7%	18.6%	-3.6%	-5.9%

Top programs so far this year (1-40)

Free TV has had a blockbuster year, with several programs smashing ratings records.

TOP PROGRAMS - OVERALL			TOP PROGRAMS - OVERALL		
1	MASTERCHEF AUSTRALIA - WINNER ANNOUNCED	5,213,304	21	HAWKE	2,219,824
2	MASTERCHEF AUSTRALIA - FINALE NIGHT	4,638,376	22	SUCH IS LIFE: TROUBLED TIMES OF BEN COUSINS - THU	2,215,176
3	STATE OF ORIGIN NSW V QLD 1ST - MATCH	3,601,490	23	2010 AUST OPEN - DAY 8 NIGHT SESSION	2,190,771
4	2010 AUST OPEN - MEN'S FINAL	3,216,160	24	STATE OF ORIGIN QLD V NSW 2ND - PRE MATCH	2,166,102
5	STATE OF ORIGIN QLD V NSW 2ND - MATCH	3,210,502	25	THE BIGGEST LOSER (AUS) - WINNER ANNOUNCED	2,145,646
6	UNDERBELLY: THE GOLDEN MILE EP 1	3,032,996	26	MASTERCHEF AUSTRALIA - TOP 50 WED	2,138,587
7	STATE OF ORIGIN NSW V QLD 3RD - MATCH	2,828,929	27	MASTERCHEF AUSTRALIA - TOP 50 THURS	2,125,579
8	PACKED TO THE RAFTERS	2,823,893	28	MIRACLE AT THE ZOO	2,113,531
9	UNDERBELLY: THE GOLDEN MILE EP 2	2,754,647	29	NCIS	2,092,481
10	2010 AUST OPEN - WOMEN'S FINAL	2,551,834	30	MASTERCHEF AUSTRALIA - TOP 50 TUES	2,083,134
11	SUCH IS LIFE: TROUBLED TIMES OF BEN COUSINS - WED	2,495,512	31	DANCING WITH THE STARS 10 - GRAND FINAL	2,074,180
12	MASTERCHEF AUSTRALIA	2,489,527	32	SEVEN NEWS - SUN	2,046,579
13	HAMISH & ANDY'S CARAVAN OF COURAGE: GB & IRELAND	2,489,133	33	NATIONAL NEWS SUNDAY	2,010,180
14	STATE OF ORIGIN NSW V QLD 1ST - PRE MATCH	2,481,512	34	UNDERCOVER BOSS WED	2,002,510
15	MASTERCHEF AUSTRALIA - CHALLENGE	2,434,872	35	NEW YEARS EVE 2009 MIDNIGHT FIREWORKS	1,993,078
16	UNDERCOVER BOSS PREMIERE	2,390,132	36	WORLD'S STRICTEST PARENTS	1,990,680
17	UNDERBELLY: THE GOLDEN MILE	2,372,768	37	2010 AUST OPEN - MEN'S FINAL PRESENTATION	1,990,139
18	2010 AUST OPEN - MEN'S FINAL INTRODUCTION	2,332,846	38	MODERN FAMILY	1,941,718
19	MASTERCHEF AUSTRALIA - LAUNCH	2,283,177	39	BORDER SECURITY - AUSTRALIA'S FRONT LINE - TUE	1,920,117
20	AUSTRALIA'S GOT TALENT	2,272,862	40	TWO AND A HALF MEN	1,915,703

Source: OzTAM & RegionalTAM, 5 cap cities & 4 agg regional markets, consolidated ratings for calendar year 2010, total people, metro and regional audiences are added to form a combined average audience and ranking, Free TV programs,(ex sneak peeks).

Incremental audiences

The inclusion of PVR homes into the television ratings panels at the end of last year means we can now measure the incremental viewing occurring in these households.

A review of the top 40 time-shifted programs so far this year, shows that the top time-shifted programs are delivering incremental audiences of up to 180,000 viewers.

Top time-shifted programs so far this year (1-20)

Rank	Program	Genre	Preliminary Overnight	Consolidated	% Increase	Audience Increase
1	PACKED TO THE RAFTERS	Drama	2,644,000	2,824,000	6.8	181,000
2	HOUSE EP 2	Drama	1,353,000	1,500,000	10.9	148,000
3	THE AMAZING RACE	Reality	751,000	898,000	19.6	147,000
4	HOUSE	Drama	1,003,000	1,147,000	14.4	145,000
5	SUCH IS LIFE: TROUBLED TIMES OF BEN COUSINS - WED	Sports Event	2,359,000	2,495,000	5.8	137,000
6	THE PACIFIC	Drama	1,760,000	1,891,000	7.4	131,000
7	CITY HOMICIDE	Drama	1,274,000	1,404,000	10.2	130,000
8	HAMISH & ANDY'S CARAVAN OF COURAGE: GB & IRELAND	Light Ent	2,359,000	2,489,000	5.5	129,000
9	THE PACIFIC – EP 2	Drama	1,506,000	1,634,000	8.5	128,000
10	NCIS	Drama	1,965,000	2,092,000	6.5	127,000
11	UNDERBELLY: THE GOLDEN MILE EP 2	Drama	2,627,000	2,754,000	4.8	127,000
12	PARENTHOOD	Drama	1,318,000	1,443,000	9.5	126,000
13	THE GOOD WIFE	Drama	1,332,000	1,457,000	9.4	125,000
14	GLEE	Light Ent	1,783,000	1,907,000	7.0	124,000
15	UNDERBELLY: THE GOLDEN MILE	Drama	2,250,000	2,373,000	5.5	123,000
16	CRIMINAL MINDS - MON	Drama	1,488,000	1,611,000	8.3	122,000
17	UNDERBELLY: THE GOLDEN MILE EP 1	Drama	2,912,000	3,033,000	4.2	121,000
18	COVERT AFFAIRS	Drama	1,113,000	1,233,000	10.8	120,000
19	GREY'S ANATOMY	Drama	1,403,000	1,524,000	8.6	120,000
20	SUCH IS LIFE: TROUBLED TIMES OF BEN COUSINS - THU	Sports Event	2,096,000	2,215,000	5.7	119,000

Source: OzTAM & RegionalTAM, 5 cap cities & 4 aggregated markets, survey weeks 1 - 36 2010, total people, Free TV programs(ex sneak peeks), regular programs are a average for the period, metro and regional audiences are added to form a combined average audience total and programs are ranked on the average audience increase.

Top time-shifted programs so far this year (21-40)

Rank	Program	Genre	Preliminary Overnight	Consolidated	% Increase	Audience Increase
21	BROTHERS & SISTERS	Drama	1,159,000	1,275,000	10.0	116,000
22	BROTHERS & SISTERS - TUE	Drama	1,183,000	1,298,000	9.7	116,000
23	OFFSPRING	Drama	1,508,000	1,623,000	7.6	115,000
24	CASTLE	Drama	1,276,000	1,390,000	8.9	114,000
25	BONES	Drama	1,745,000	1,856,000	6.4	113,000
26	OFFSPRING - TELEMOVIE	Drama	1,529,000	1,638,000	7.1	110,000
27	PRIVATE PRACTICE	Drama	849,000	959,000	13.0	110,000
28	SURVIVOR: HEROES VS VILLAINS - REUNION	Reality	1,020,000	1,128,000	10.6	109,000
29	GREY'S ANATOMY - EP 2	Drama	1,383,000	1,491,000	7.8	108,000
30	HAWKE	Movie	2,114,000	2,220,000	5.0	107,000
31	DESPERATE HOUSEWIVES	Comedy	1,294,000	1,399,000	8.1	106,000
32	CRIMINAL MINDS	Drama	1,599,000	1,703,000	6.5	104,000
33	LIE TO ME	Drama	1,307,000	1,410,000	7.9	102,000
34	ALVIN & THE CHIPMUNKS	Movie	1,054,000	1,155,000	9.6	101,000
35	FLASHFORWARD – EP 2	Drama	456,000	556,000	21.9	101,000
36	THE MENTALIST	Drama	1,771,000	1,871,000	5.6	100,000
37	A TOUCH OF FROST	Movie	1,152,000	1,251,000	8.6	99,000
38	MASTERCHEF AUSTRALIA - TOP 24 REVEALED	Reality	1,676,000	1,775,000	5.9	99,000
39	MODERN FAMILY	Comedy	1,842,000	1,941,000	5.4	99,000
40	SHREK THE THIRD	Children's	1,632,000	1,731,000	6.1	99,000

Source: OzTAM & RegionalTAM, 5 cap cities & 4 aggregated markets, survey weeks 1 - 36 2010, total people, Free TV programs(ex sneak peeks), regular programs are a average for the period, metro and regional audiences are added to form a combined average audience total and programs are ranked on the average audience increase.

For more ratings information, visit www.thinktv.com.au