

REGIONAL INSIGHTS

2013

FIRST, A QUICK REVIEW...

WHAT IS AVERAGE AUDIENCE?

Average audience (or AUD) is an estimation of the average number of people who were watching a program or a particular period of time.

There are **two variables** that make up the AUD:

CUMULATIVE REACH



The number of different people who tune in to a program or period of time

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AVERAGE TIME SPENT VIEWING



The average number of minutes spent viewing a program or period of time

SO WHAT... ???

... so the AUD for a program may increase if, for example...

There are **more new viewers** watching the program after hearing about it from all their friends

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The same number of viewers are watching the program - but they are watching for **more minutes** as they find it more engrossing

or

... and visa versa for a program where the AUD decreases...

NOW...

... lets look at the numbers for 2013...



THE PROGRAMS...

... that piqued regional viewers interests...

MOST WATCHED EVENTS...

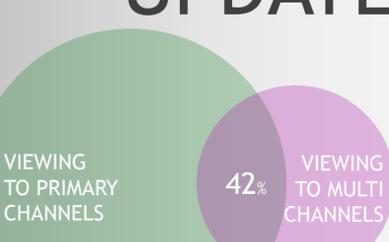


TOP 10 SERIES FOR COMBINED AGGREGATE MARKETS

1	MY KITCHEN RULES	850,000
2	THE VOICE	766,000
3	PACKED TO THE RAFTERS	764,000
4	A PLACE TO CALL HOME	723,000
5	MRS. BROWN'S BOYS	689,000
6	SUNDAY NIGHT	658,000
7	HOUSE RULES	652,000
8	DOWNTON ABBEY	643,000
9	60 MINUTES	615,000
10	ARROW	596,000

Includes TEN West & GWN7 in Regional WA & Southern Cross TAS & TDT in Tasmania

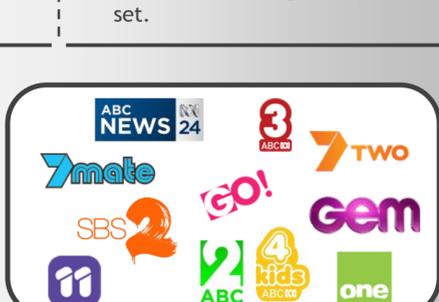
MULTI CHANNEL UPDATE...



- On any given day, **3.7 million** regional viewers tune in to watch a primary channel for at least 30 minutes.
- Those that tune in to watch at least 30 minutes of a **multi channel** account for **2.4 million** regional viewers.
- The portion of regional viewers who watch at least 30 minutes of BOTH primary and multi channel is **42%**.
- Looking back, this has grown from **18%** in 2010 - at a time when only **3/4** of homes had a digital capable TV set.

4 ...the average number of nights regional viewers watch a multichannel for 30 minutes or more.

15% ...of the programs in the multi channel regular top 20, also appear on the primary channel's broadcast schedule.



PVR HOMES



FREE TO AIR ONLY HOME with a PVR VS SUBSCRIPTION TV HOME with a PVR



The age profile and household size is similar amongst PVR homes, regardless of whether they have subscription or are a free to air only home. However, the average time spent viewing TV is the key differentiating factor, with PVR + STV homes watching 100 minutes more in across an average day.

The viewing behaviour for people with PVR compared against those without a PVR, become most notable during peak times. The highest audience for both PVR and non-PVR viewers is at 8pm, peaking at 1.7m and 1.5m respectively.

