



2019: YEAR IN REVIEW

REGIONAL TAM RATINGS OVERVIEW

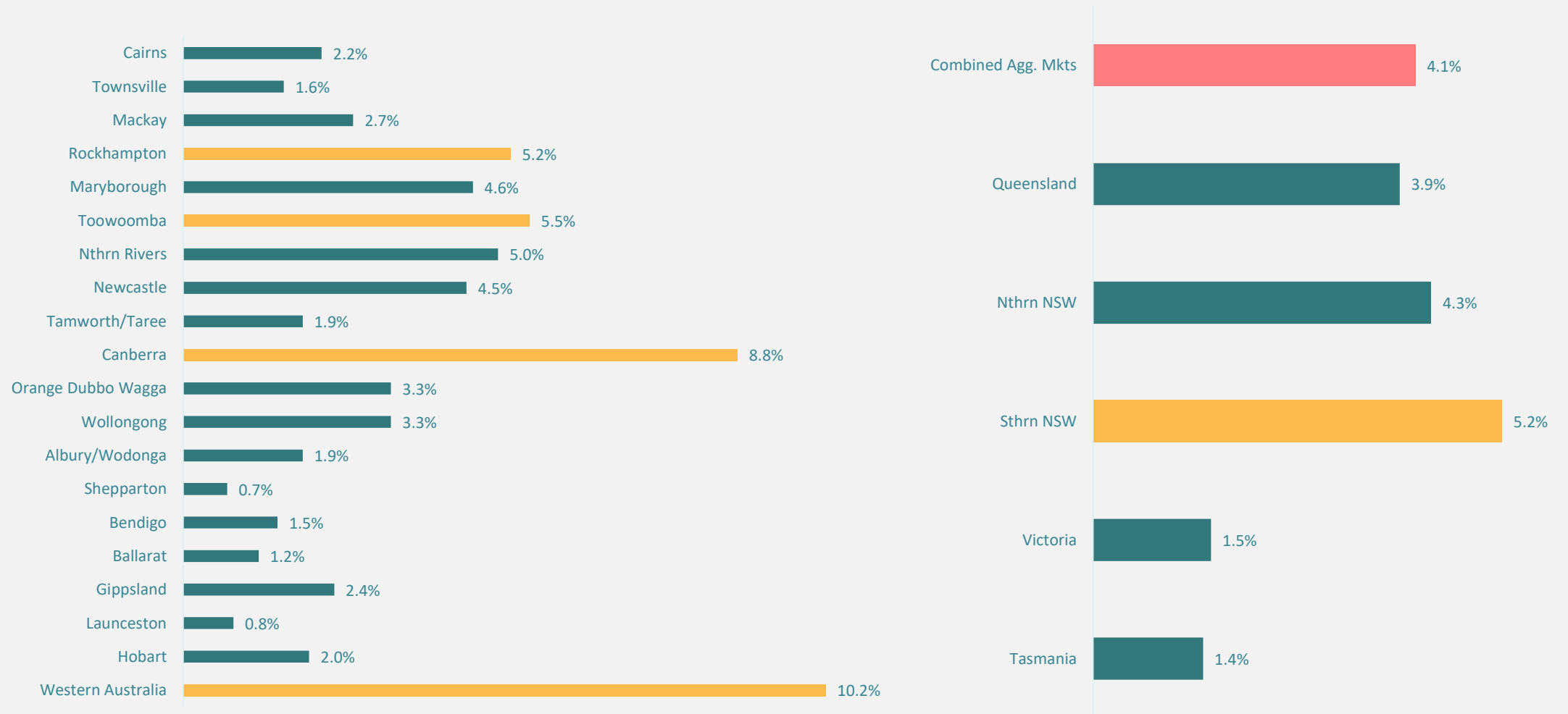
Survey 1-10 excluding Easter 2019

KEY BROADCAST TRENDS

1. MOVEMENT IN UNIVERSE ESTIMATES

Since 2013, Regional WA has seen the largest population growth thanks to the mining boom. This however, has slowed over the past couple of years. The growth rate for Canberra, on the other hand has been increasing in recent years.

Queensland sub-markets overall has seen the strongest growth during this period, whilst Victorian & Tasmanian sub-markets has seen the slowest growth.

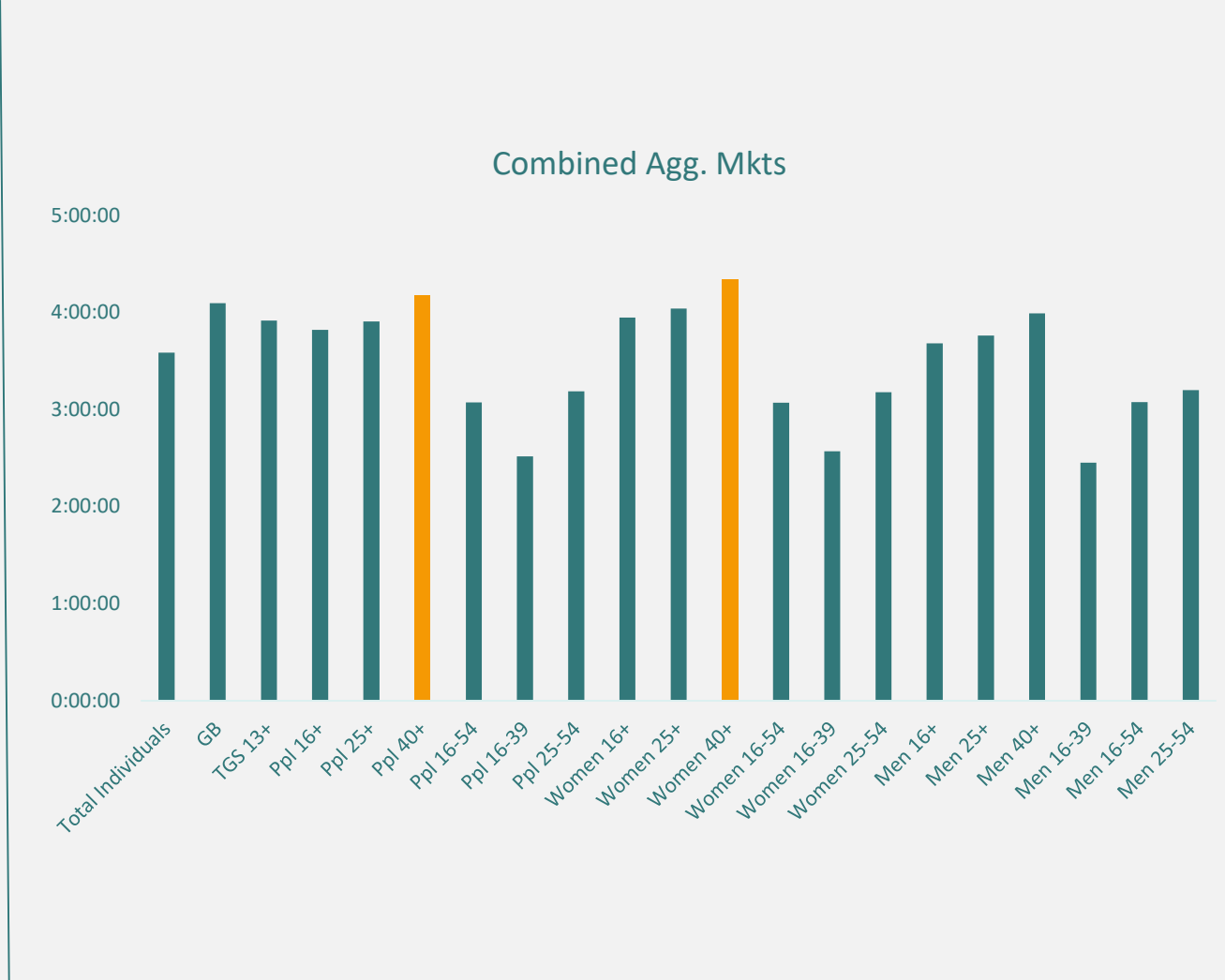
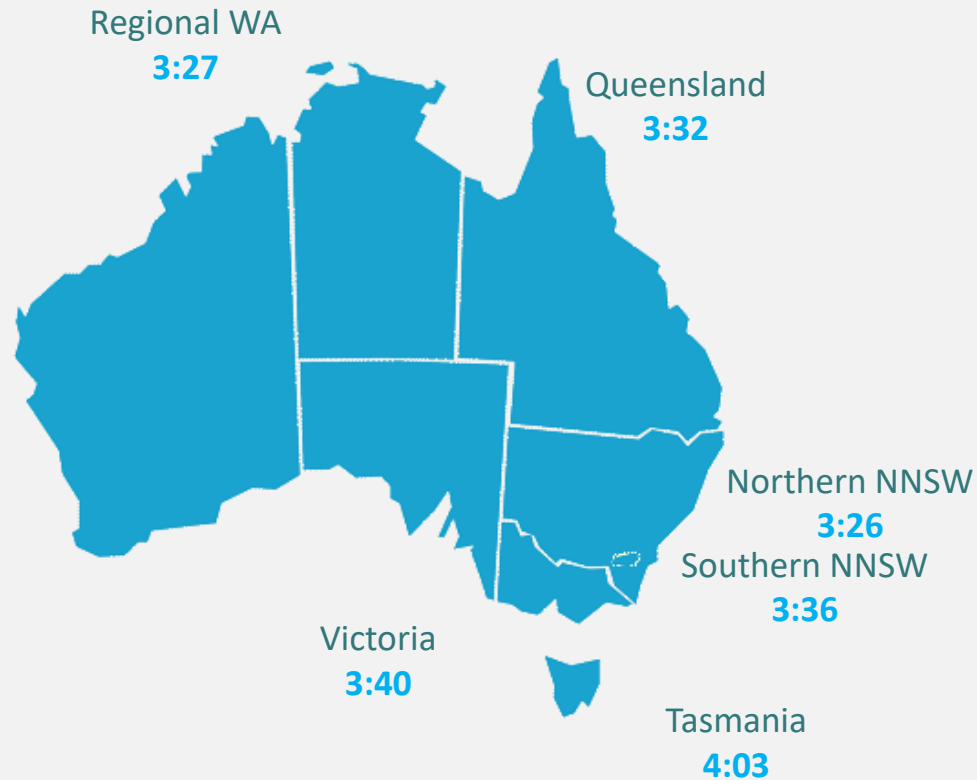


SOURCE: REGIONAL TAM | UNIVERSE ESTIMATE DIFFERENCES 2013-2019

2. REGIONAL VIEWERS WATCHING 3 HOURS 35 MINS PER DAY

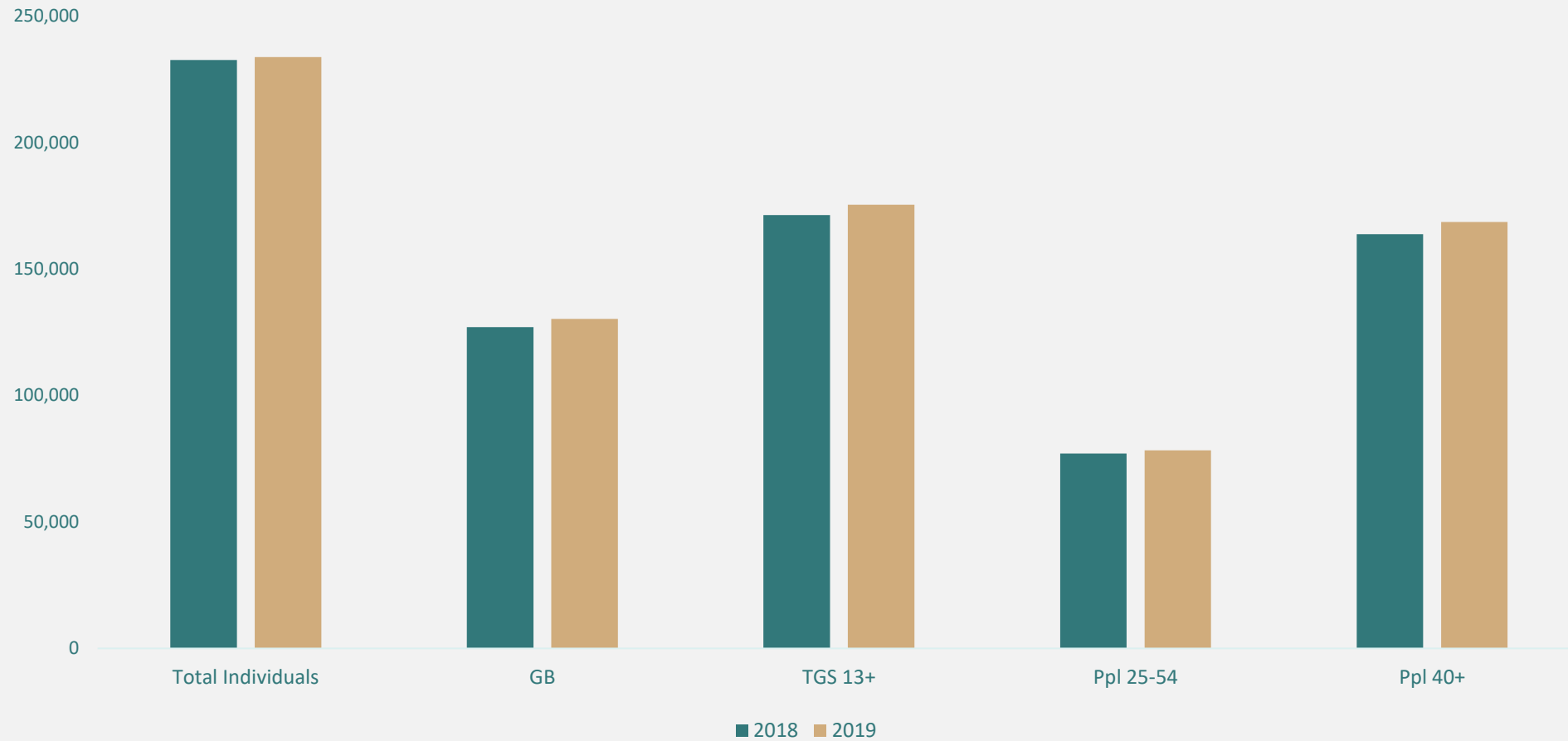
Victoria and Tasmania in particular watch well above the regional average of 3 hours and 35 minutes per day, along with Women 40+ and People 40+.

COMBINED AGGREGATE MARKETS
AVERAGE TIME SPENT (VIEWING)
3:35



3. FTA MULTI CHANNEL VIEWING

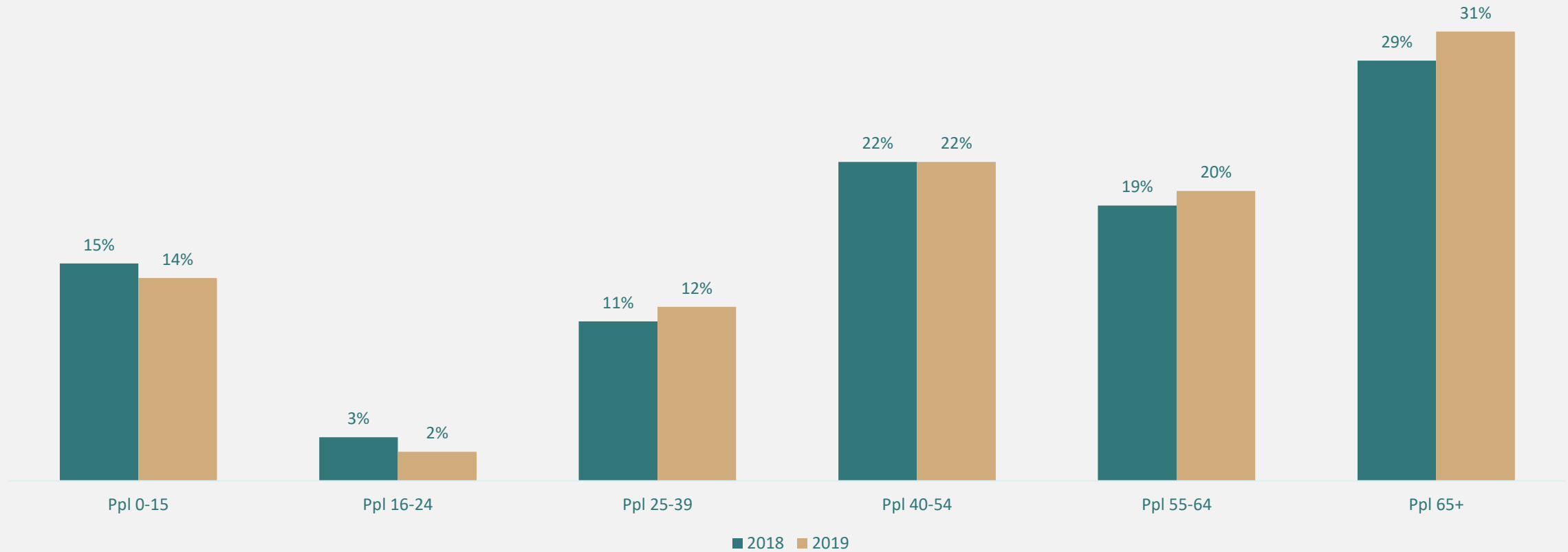
Audience for Grocery Buyers (GB) is up by 2.6% and 2.9% for PPL 40+.



4. PROFILE SHIFTS FOR THE MULTI CHANNELS

Compared to last year, proportion of viewing has increased on the multi-channels for People 25+.

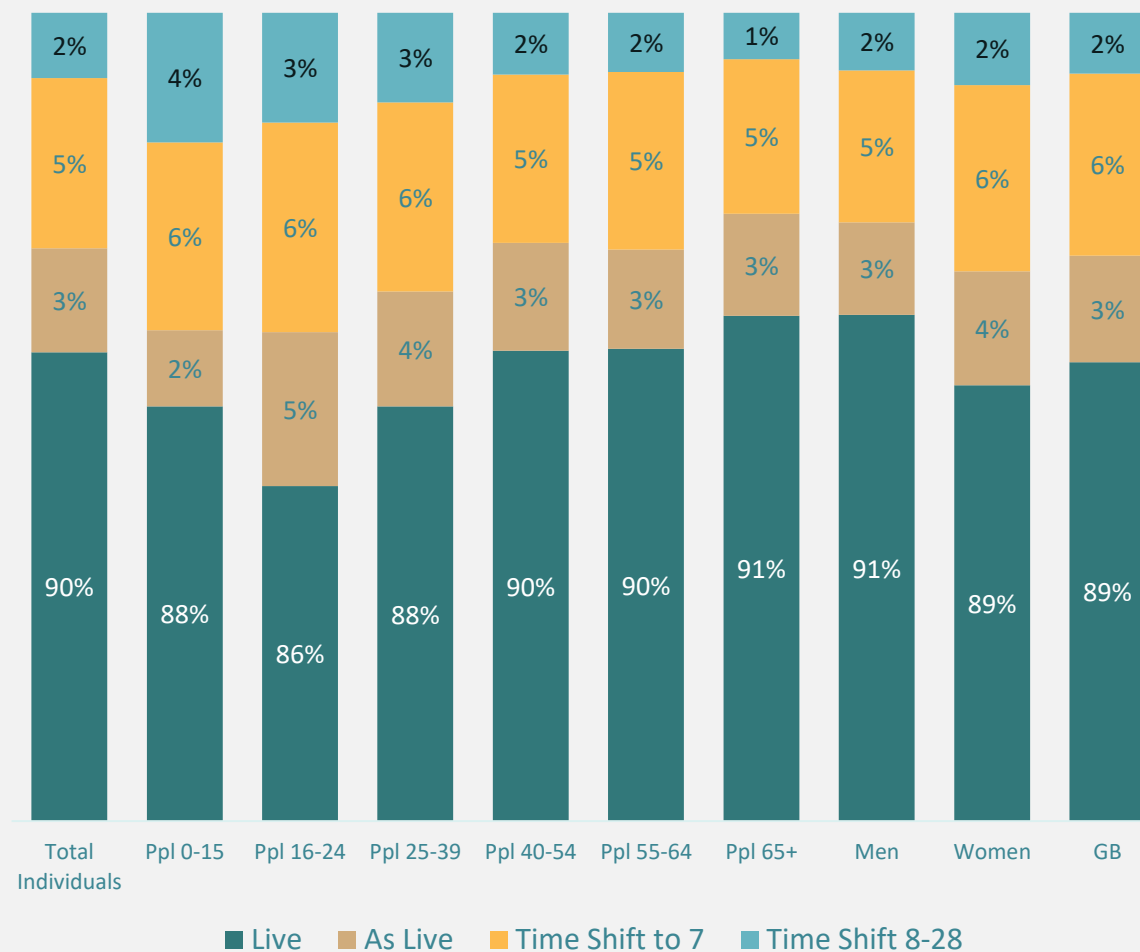
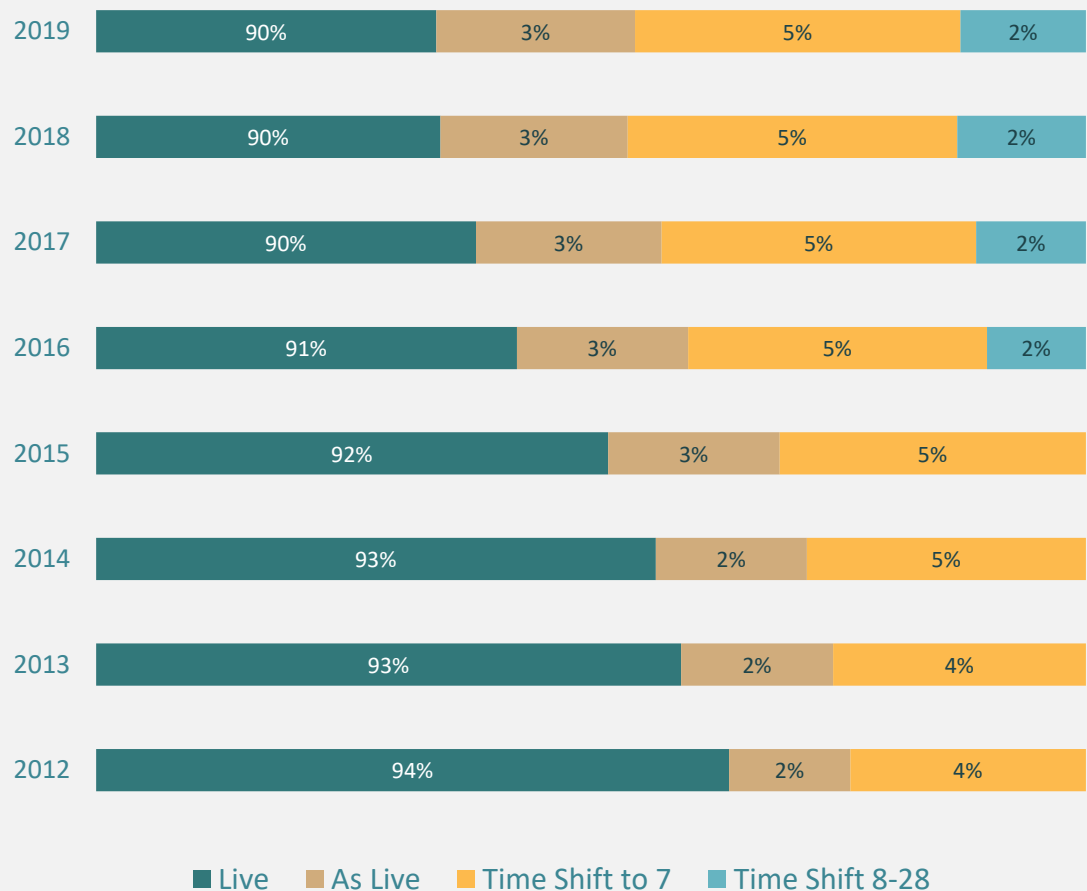
AGE PROFILE



SOURCE: REGIONAL TAM | SURVEY 1-10 2018 & 2019 EXC. EASTER | TOTAL INDIVIDUALS | TTL FTA Multi | PROFILE CONSOLIDATED 7 | 0200-2600 SMTWTFS | COMBINED AGGREGATE MARKETS

5. LIVE VIEWING CONTINUES TO REMAIN STEADY

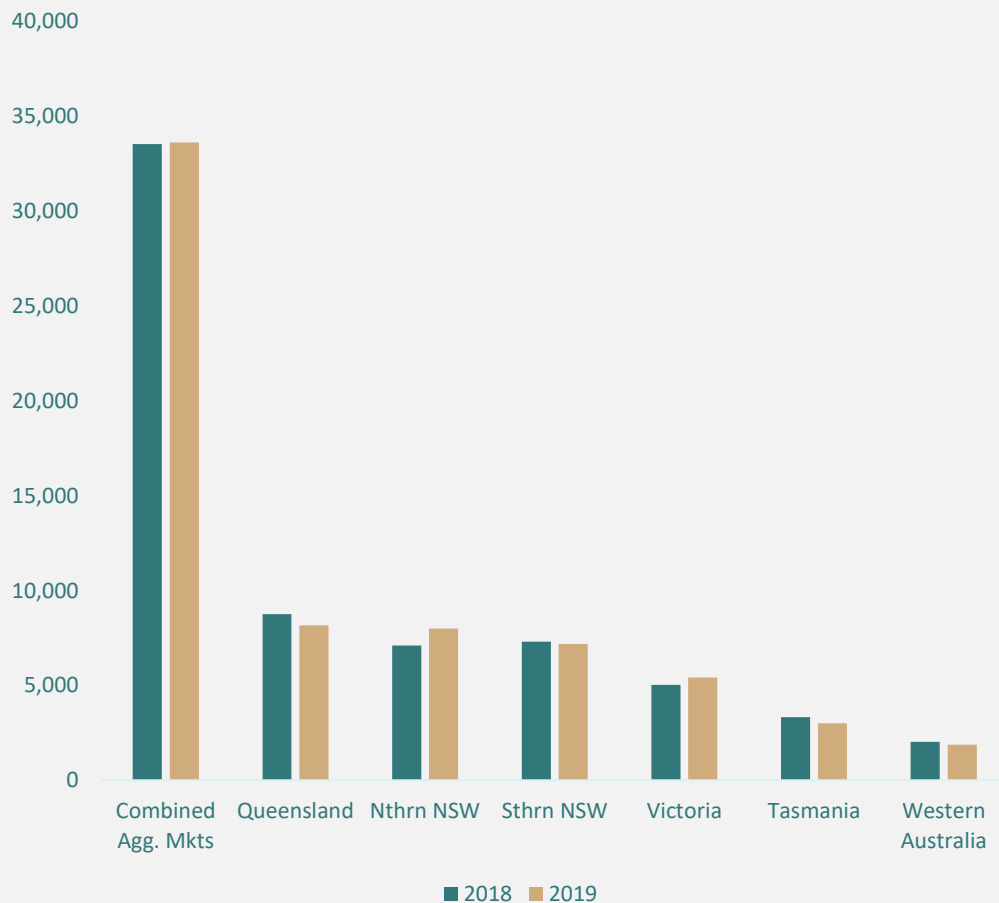
Live viewing as a proportion of all viewing remains steady at 90% for the 1800-2230 time slot, but varies by demographic.



6. PLAYBACK VIEWING BY MARKET & GENRE

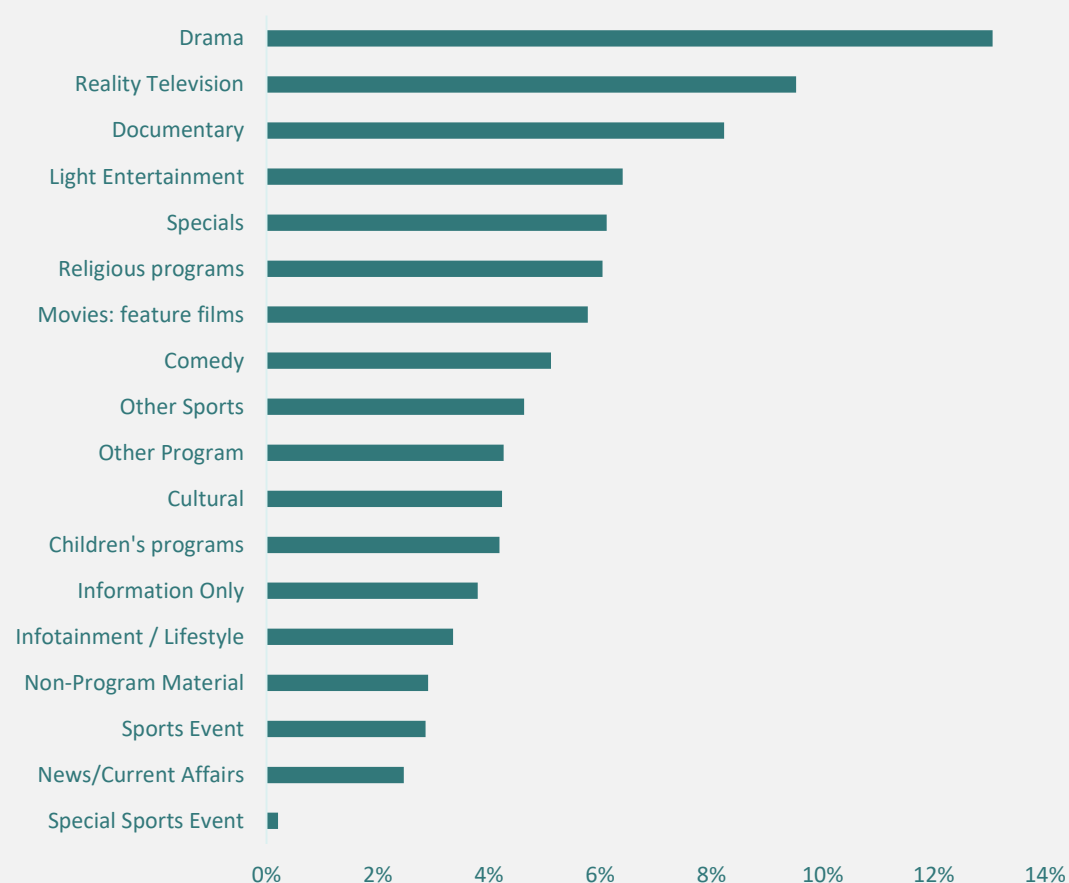
Playback viewing has been consistent on a combined market level year-on-year, with drama programming making up the highest proportion at 13%.

PLAYBACK TO 7 (000's)



SOURCE: REGIONAL TAM | SURVEY 1-10 2018 & 2019 EXC. EASTER | TOTAL INDIVIDUALS | TTL FTA (excl Spill) | PLAYBACK TO 7 (AS LIVE + TIME SHIFT TO 7) | 0200-2600 SMTWTFS | AGGREGATE MARKETS | AUD

PLAYBACK TO 7 AS A PERCENTAGE OF CONSOLIDATED 7

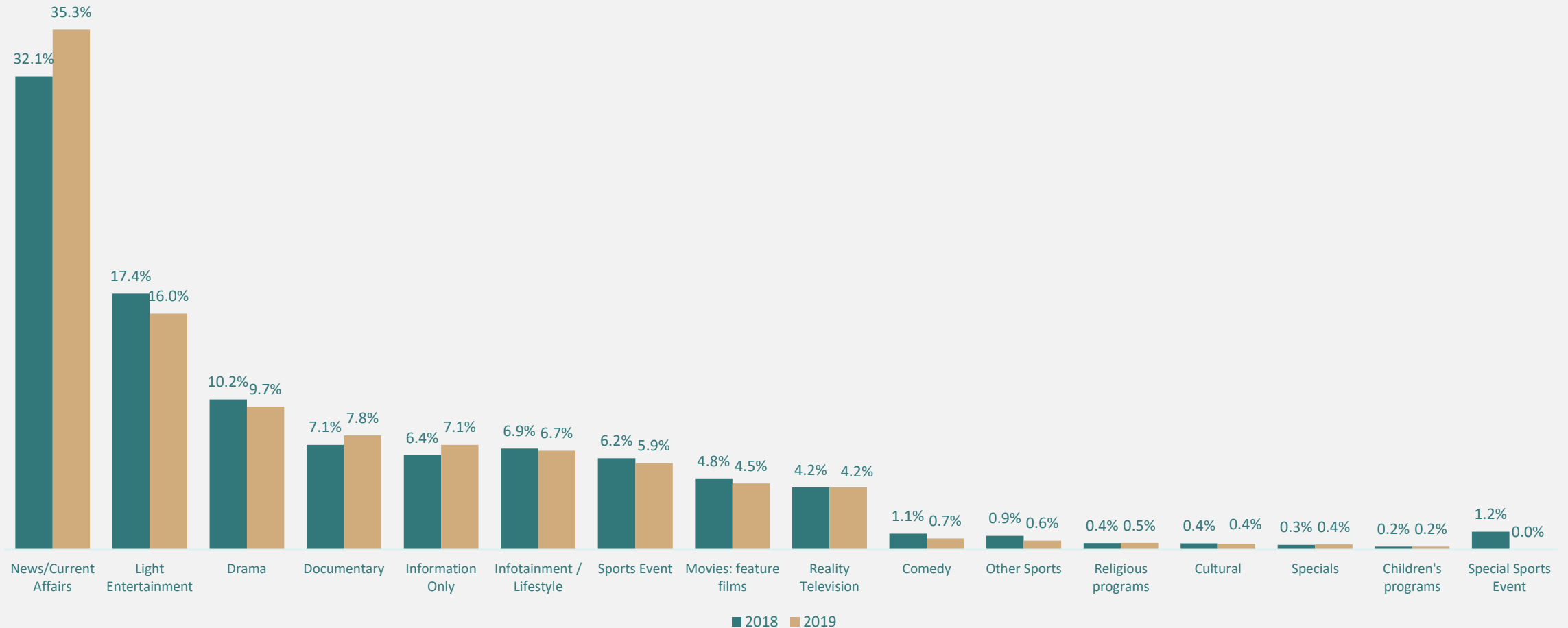


SOURCE: REGIONAL TAM | SURVEY 1-10 2019 EXC. EASTER | TOTAL INDIVIDUALS | TTL FTA (excl Spill) | PLAYBACK TO 7 AS A % OF CONSOLIDATED 7 | 0200-2559 SMTWTFS | 0200-2600 SMTWTFS | AGGREGATE MARKETS | AUD

7. PROPORTION OF BROADCAST HRS: FTA PRIMARY CHANNELS

News/Current Affairs continues to represent the highest proportion of broadcast hours on the FTA primary channels, increasing again in 2019 by 3.2 points.

% OF TOTAL BROADCAST HOURS (FTA Primary)



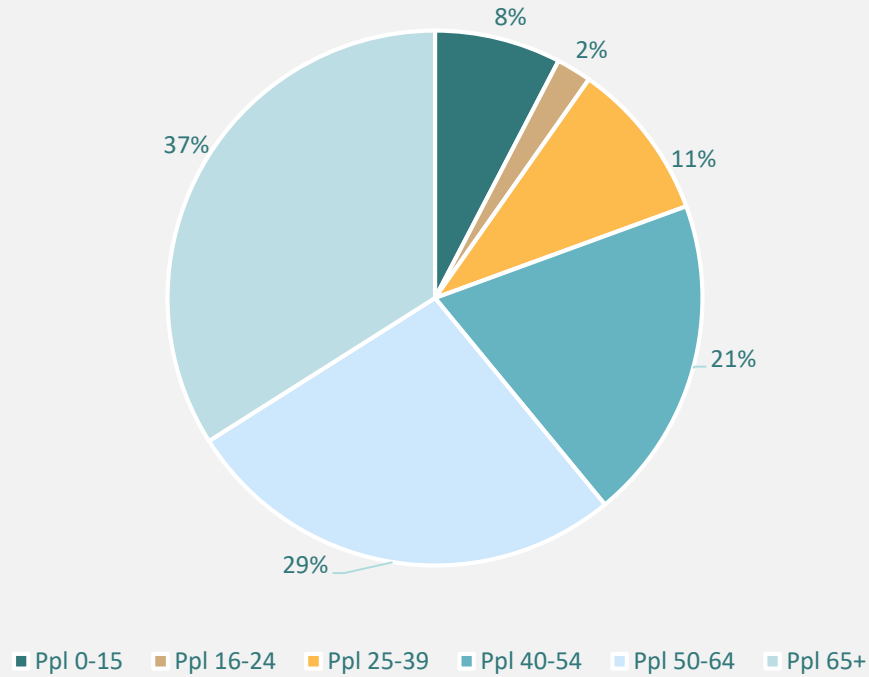
SOURCE: REGIONAL TAM | SURVEY 1-10 2018 & 2019 EXC. EASTER | TOTAL FTA Primary | CONSOLIDATED 7 | 0200-2600 SMTWTFS | COMBINED AGGREGATE MARKETS | BROADCAST SHARE TYPOLOGY

SKY NEWS ON WIN LAUNCH DATE 2ND SEPT 2018

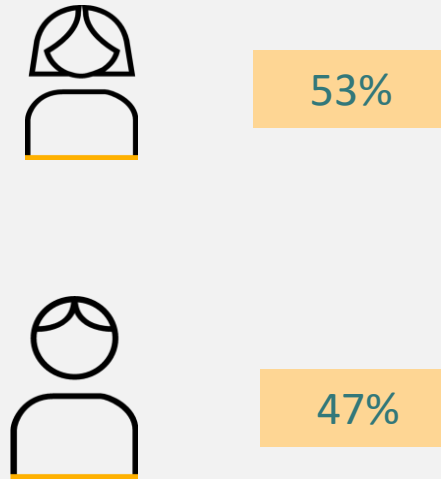
8. VIEWER PROFILES : REVIEW OF AGE & GENDER

32% of viewers are aged between 25 and 54, with 36% being 65+. Profiles are consistent with 2018 levels.

AGE PROFILE

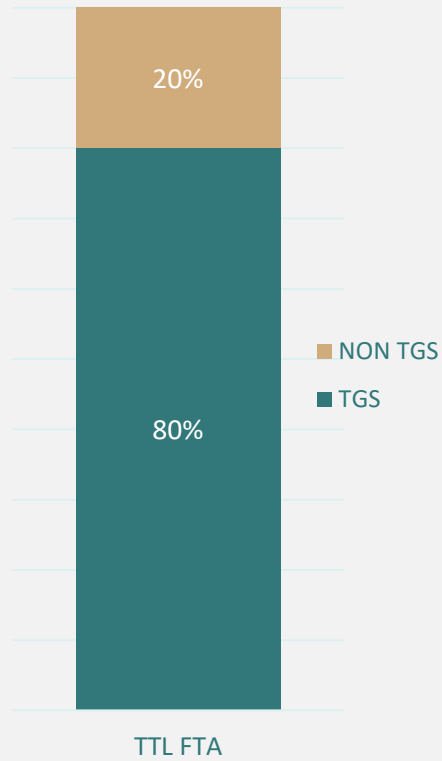


GENDER PROFILE

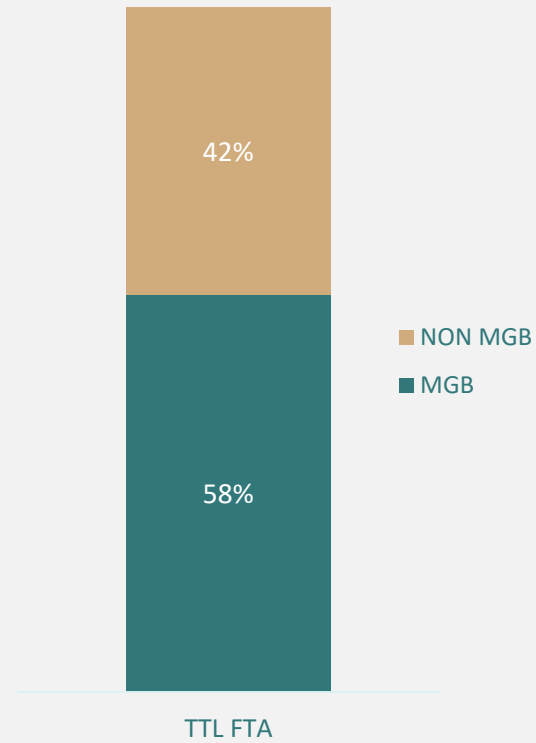


9. HIGHER PROPORTION OF TOTAL GROCERY SHOPPERS VIEWING

TOTAL GROCERY SHOPPERS (TGS)



MAIN GROCERY BUYER (MGB)

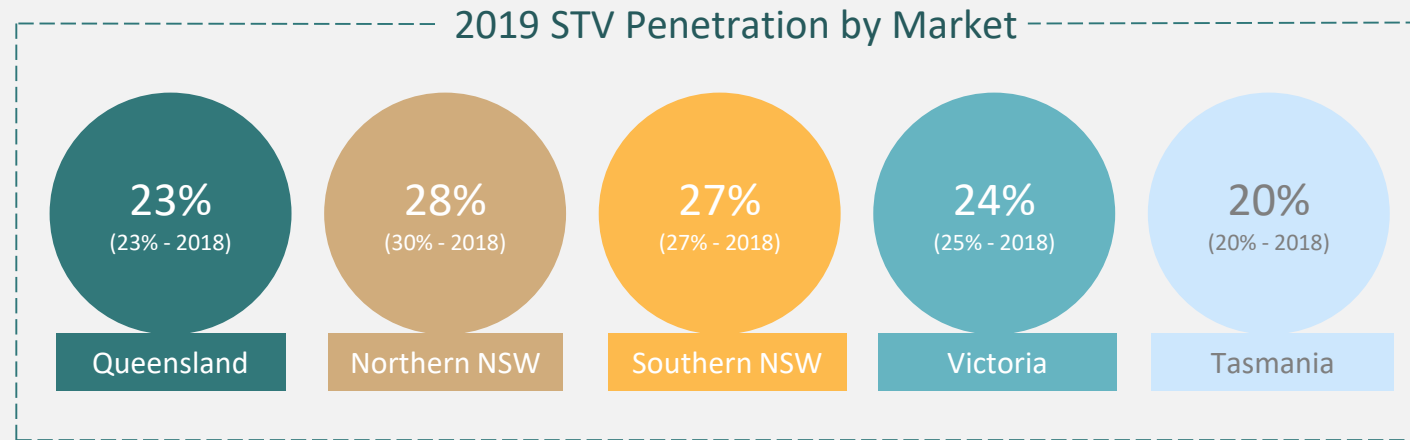
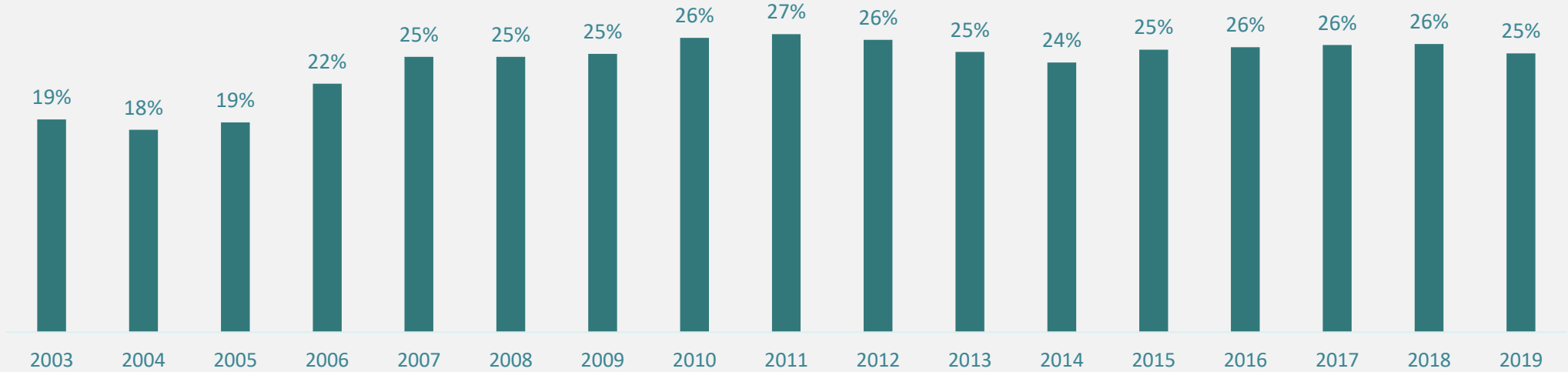


TGS account for 80% of total FTA viewing whilst MGB accounted for 58% of all FTA viewing

SOURCE: REGIONAL TAM | SURVEY 1-10 2019 EXC. EASTER | TTL FTA (EXCL SPILL) | CONSOLIDATED 7 | COMBINED AGGREGATE MARKETS
 TTL PPL – TOTAL GROCERY SHOPPER = NON TGS, TTL PPL – MGB = NON MGB | 02:00 – 25:59 AUD PROFILE

10. STV PENETRATION OVER THE YEARS

STV penetration has declined for the first time since 2014. It is now at 25% across Combined Aggregate Markets. Northern NSW has recorded the largest drop year on year with 28% in 2019 (down from 30% in 2018), with Victoria dropping 1% YOY to now be at 24%. Other markets remained stable YOY.



PROGRAM HIGHLIGHTS

THE TOP REGULAR SPORTS DELIVER ON FREE TO AIR

Nine Content Affiliates saw the highest average for Sports this year with the State of Origin QLD v NSW 1st Match.

1.038m

STATE OF ORIGIN RUGBY LEAGUE
QLD V NSW 1ST -MATCH



745k

AFL: GRAND FINAL
RICHMOND vs GWS



613k

SUPERCARS CHAMPIONSHIP
BATHURST D3 PODIUM



159k

2019 FIFA WOMEN'S WORLD CUP
AUS V ITA LIVE



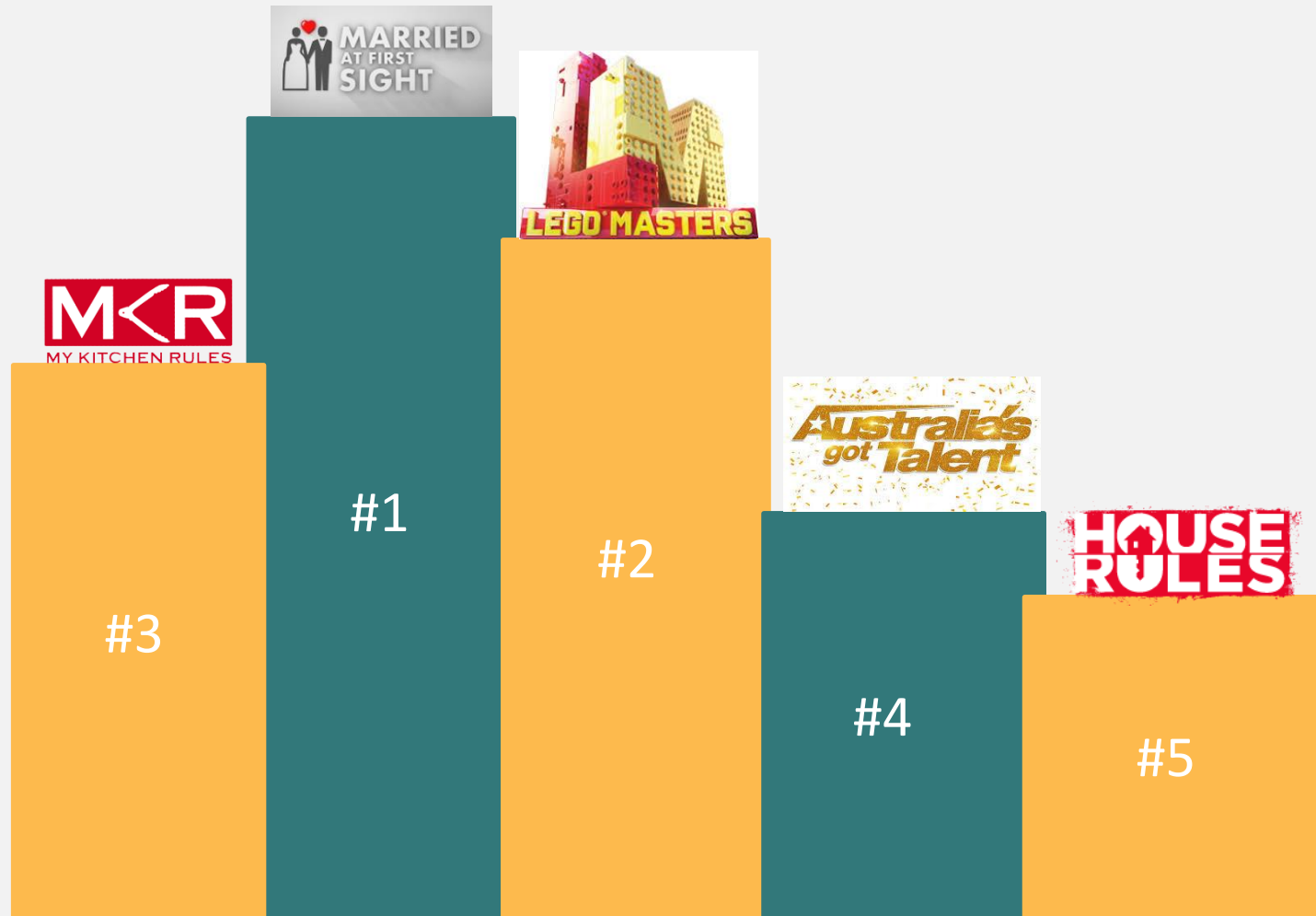
118k

FOOTBALL: WOMEN'S
INTERNATIONAL



THE TOP REGULAR PROGRAMS : FREE TO AIR

This year was all about Reality programming as it dominated the regular program rankings for 2019!



FOR FURTHER INFORMATION



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