

Changes to Television Landscape

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Changes to TV Landscape – Digital Terrestrial Penetration

- Household digital penetration increased significantly over 2009 - by 40%
 - From 43.4% in Q1, 2009 to almost 61% in Q4, 2009 across the 5 city metro markets (see [Percentage of Households Estimates](#))
 - panel representation continues to be adjusted reflecting the take up of digital terrestrial TV
- Doubling of Free-to-Air (FTA) channel choice
 - Six new FTA digital channels have been launched to date
 - Five new digital FTA channels launched in 2009
 - There are now 11 FTA channels in the Australian market
 - Exact dates for [Digital Terrestrial Channel Availability](#)



Changes to TV Landscape – Availability of Additional Channels

- In addition to the FTA digital channels launched in 2009, more digital FTA channels are expected to be launched in 2010
- Subscription TV (STV) channels launch in 2009
 - 12 new channel brands and additional HD channels (Nov '09)
 - 16 additional STV channels reported in the OzTAM TV ratings service
 - Over 80 STV channels now individually reported
 - Exact dates for [Subscription TV Channel Availability](#)

Changes to TV Landscape – Audience Measurement

- OzTAM introduced measurement of Time Shift Viewing (TSV) from 27 Dec 2009 (week 1 of 2010 survey year)
- Prior to week 1, OzTAM's panel was a 'LIVE' only panel
- From week 1, 2010 OzTAM TV ratings service additionally measures and reports data on Time Shift Viewing
- Time Shift Viewing (TSV) is defined as viewing of television broadcast programming at a later time than the live broadcast time, including:
 - Viewing of a recorded program at a later time
 - Pausing of a program as it is broadcast live and then continuing to watch it in playback



Changes to TV Landscape – Audience Measurement

- From week 1, 2010 the OzTAM panel remains the same size, however PVR homes were introduced to the panel, in such a way that representation of other key characteristics were unaffected
 - non PVR homes account for approximately 75% of the panel, while
 - PVR homes account for 25% of the panel
 - panel representation continues to be adjusted reflecting the take up of PVR
- The profile of PVR homes is different to non-PVR homes. They are more likely to be:
 - Young Couples, Young Families, Pre-Teen Families, Teen Families
 - Group Households < 55 years old
 - Multiple TV Set Homes (2 & 3+ TVs)
 - Digital Homes (DTT)
 - STV Homes
- Due to 'break-in series' /change in panel, pre- and post- Time Shift Viewing data sets are not directly comparable