

Metropolitan Market Snapshot

Period 4, 2011

Percentage of households with DTT or STV
Channel repertoire and television sector viewing shares

The extent to which viewers are adopting television technology – including Digital Terrestrial Television (DTT) and Subscription TV (STV) services – varies across Australia’s five mainland capital cities.

Accordingly, viewing patterns vary between those markets – not just demographically but also due to their respective technical characteristics.

To give clients a more holistic perspective of viewing behaviours, OzTAM is pleased to provide this market-by-market snapshot of:

- DTT and STV penetration
- Average share of viewing to DTT and STV (6pm – Midnight; all day)
- Channel repertoire (the typical number of channels households view for 15 consecutive minutes over the 4 week survey period, in all homes as well as in STV and FTA-only homes)

While OzTAM expects the individual market characteristics to remain stable in the near future, this information will be updated in the event of significant change.

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The following chart presents viewing shares and channel repertoire estimates alongside estimates of DTT and STV capable households for each metropolitan market.

The Sydney market has the highest STV penetration and the lowest DTT penetration

- Viewing share to TTL FTA Digital is lowest of the markets
- Channel repertoire is the highest

The Melbourne market has the third highest STV penetration, slightly higher than Perth, but the second lowest DTT penetration

- TTL FTA Primary share is second highest

The Brisbane market has the second highest STV penetration, after Sydney

- TTL FTA Primary share is lowest in these two markets

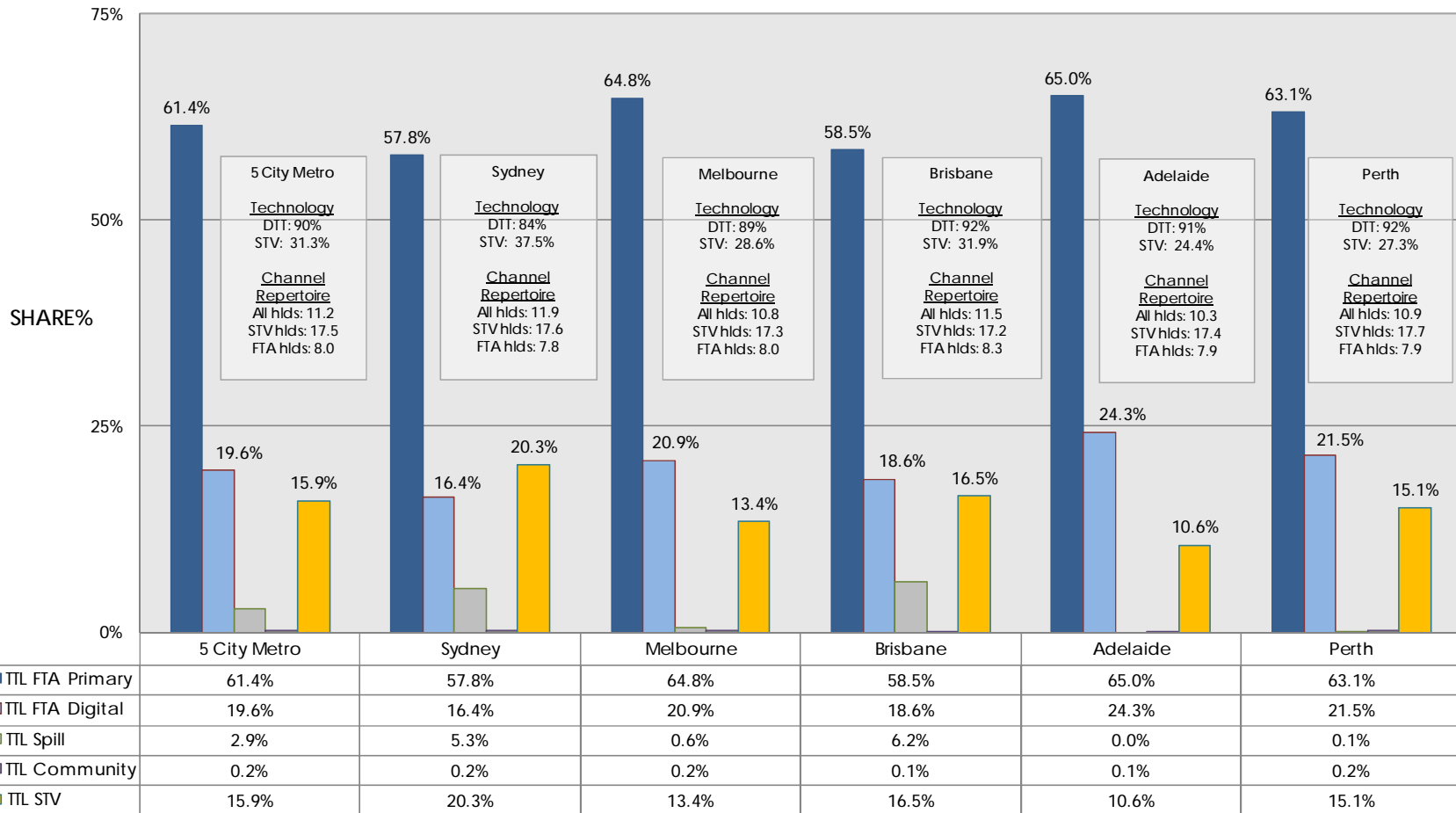
The Adelaide market has the lowest STV penetration and highest DTT penetration

- Highest viewing share to TTL FTA Digital across markets
- Channel repertoire is the lowest

The Perth market has the fourth highest STV and DTT penetration

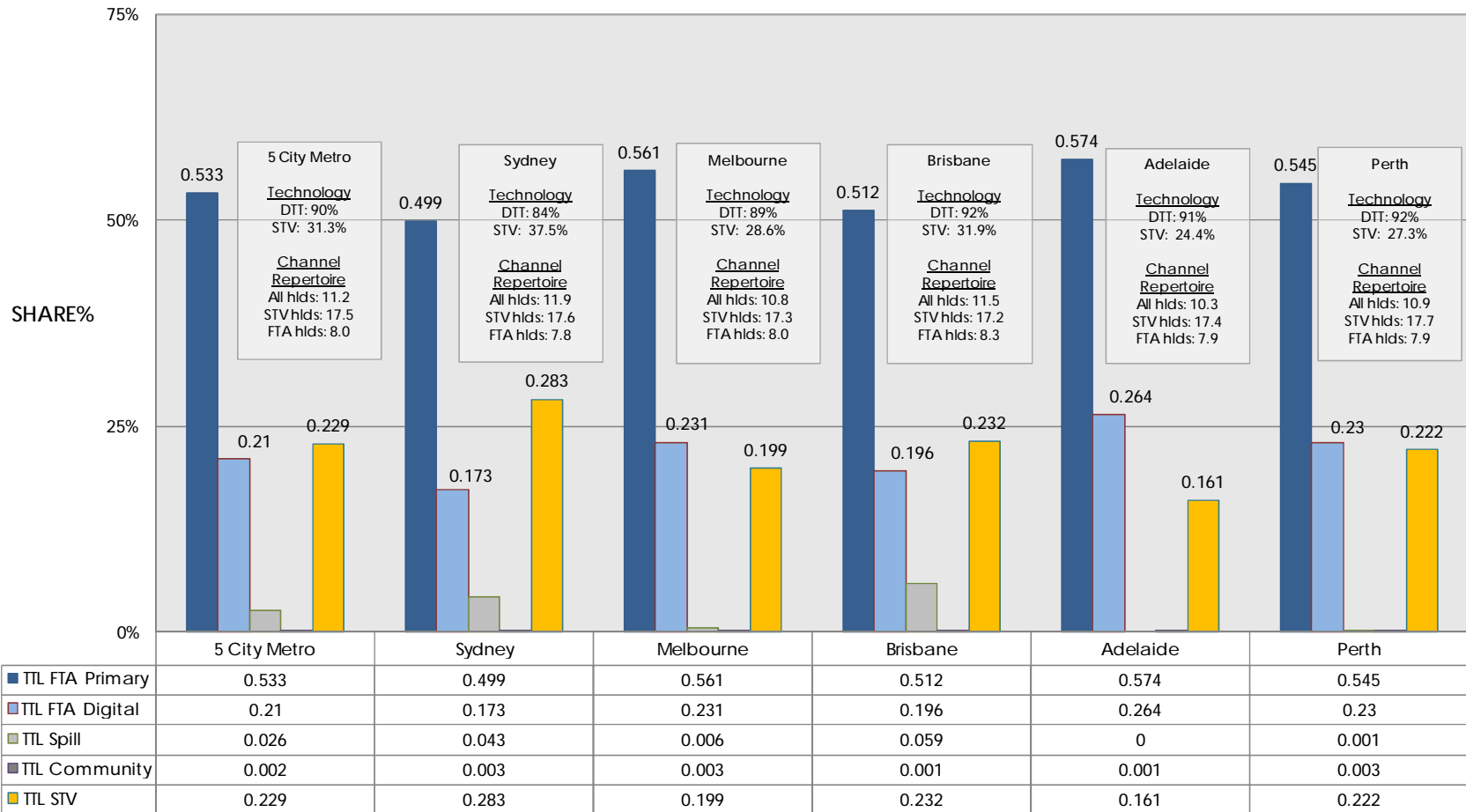
- Highest STV households (hlds) channel repertoire and STV viewing share similar to the 5 city average

Metropolitan Television Consolidated Viewing Share Period 4 (20Mar11-16Apr11) 6pm-Midnight



DTT HHds as at end Period 4, 16 April 2011; STV HHds as per 2011 Metro UEs; Channel Repertoire is the number of Channels Viewed - All Day - 15 Mins (consecutive) Period 4.

Metropolitan Television Consolidated Viewing Share Period 4 (20Mar11-16Apr11) All Day



DTT Hhlds as at end Period 4, 16 April 2011; STV Hhlds as per 2011 Metro UEs; Channel Repertoire is the number of Channels Viewed - All Day - 15 Mins (consecutive) Period 4.