

NETWORK INSIGHT

LEURA 2006

SESSION 7

24 FEBRUARY

- How should Television Adapt to Flourish**
 - The Public Service Broadcasters**

ABC & SBS TOTAL VIEWING 2005

Share 6am - midnight

	Pay TV % Take Up	FTA only %		Total Viewing %		
		ABC	SBS	ABC	SBS	Pay
Sydney	31	16.5	5.0	12.7	4.0	19.8
Brisbane	25	16.1	4.4	12.2	3.4	15.4
Melbourne	24	16.0	4.7	13.1	4.0	16.6
Perth	19	16.9	4.7	14.8	4.2	11.2
<u>Adelaide</u>	<u>18</u>	<u>16.2</u>	<u>4.4</u>	<u>14.3</u>	<u>4.0</u>	<u>10.7</u>
Total						
Metro	25	16.3	4.7	13.1	3.9	16.1

ABC SBS & OTHER VIEWING LATE 2005 IN PAY TV HOMES Share 6am - midnight

National Broadcasters		Children's		Music		General	
ABC	4.3%	Disney	2.1%	MTV	0.7%	Arena	2.5%
SBS	1.3%	Boomerang	0.3%	Max	0.5%	Fox	4.3%
		Cart Net	1.1%	V	0.6%	TV1	3.7%
		Nick	1.1%				
		Nick Jnr	1.4%				
<u>Total</u>	<u>5.6%</u>		<u>6.0%</u>		<u>1.8%</u>	<u>10.5%</u>	

OTHER ABC METRICS

**ABC Weekly
Reach last
5 years**

Metro

70% - 64%

Regional

70% - 62%

- **The drop between ABC FTA only share and its share in pay TV homes is 50% greater than for the average commercial FTA network**
- **The drop between ABC total weekly reach and its weekly reach in pay TV homes is even more substantially greater than for the average commercial FTA network**
- **SBS fares about the same as the ABC**

ABC AND THE CHILDREN'S AUDIENCE IN PAY TV HOMES

- **In 2004 about 70% of the 5-12 year demographic viewing in pay TV homes was on pay channels**
- **By Dec 2004 this percentage was 75%**
- **In 2004 pay TV's share of all group's viewing was about 52%**
- **25% of total ABC 1 TV transmission is children's and education**

UK – THE BBC & MULTICHANNEL HOMES 2006

	Total Viewing Share	Share in Multichannel Homes
BBC	32.7%	25.3%
Total Private TV	37.6%	32.7%
Others	29.6%	41.9%

- **BBC has 7.7% of the ‘Others’ through its 6 branded (3.6%) and 17 JV UKTV digital channels (4.1%)**
- **BBC 6 branded and 17 UKTV digital channels get about the same share of audience as the 25 SKY branded channels**
- **ITV has 3.5% of the ‘Others’**
- **Channel 4 has 3.1% of the ‘Others’**

BBC & DIGITAL CHANNELS

- **BBC has 6 branded digital channels (BBC 2, 3, News, Parliament, CBeebies and CBBC) and 17 JV digital channels via UKTV**
- **BBC spends \$700 million (Aud) a year on Freeview platform and its 6 branded digital channels**
- **BBC spends more on the 6 branded digital channels than on Radio 1, 2, 3, 4 and Live 5 services - 10% of its total licence fee expenditure**
- **The four main FTA entities (BBC, ITV, 4 and Five) provide 16 new digital channels between them. 3 of them are time shift and 10 are niche channels**

BBC & CHILDREN'S DIGITAL CHANNELS

- **There are 19 different children's channels separately measured by BARB**
- **15 are unique and 4 are time shift versions**
- **CBeebies and CBBC are number 1 and 2 for audience share**
- **CBeebies is ninth in terms of audience share of the 178 channels separately measured by BARB**
- **BBC spent \$102 million (Aud) in 2003/04 on these two children's digital channels**
- **Currently ABC spends about \$2 million on ABC 2**