

Attachment D

Regional Australian television news

Audiences across regional evening news services, 2003–2013

NOVEMBER 2013

Canberra Red Building Benjamin Offices Chan Street Belconnen ACT	Melbourne Level 32 Melbourne Central Tower 360 Elizabeth Street Melbourne VIC	Sydney Level 5 The Bay Centre 65 Pirrama Road Pyrmont NSW
PO Box 78 Belconnen ACT 2616	PO Box 13112 Law Courts Melbourne VIC 8010	PO Box Q500 Queen Victoria Building NSW 1230
T +61 2 6219 5555 F +61 2 6219 5353	T +61 3 9963 6800 F +61 3 9963 6899	T +61 2 9334 7700 1800 226 667 F +61 2 9334 7799

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Written enquiries may be sent to:

Manager, Editorial and Design
PO Box 13112
Law Courts
Melbourne VIC 8010
Tel: 03 9963 6968
Email: candinfo@acma.gov.au

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Executive summary

About the research

In June 2013, the Australian Communications and Media Authority (the ACMA) commenced an analysis of regional television audience ratings in order to determine whether or not there is an observable trend or trends in regional audience numbers for news services. The source data was provided by Regional TAM (RegTAM) and includes 19 of the more highly populated regional sub-markets in Australia.

This research report focuses on average audiences for local news and metropolitan news services (containing state, national and international news) that are broadcast for 30 or 60 minutes between 5.00 pm and 7.30 pm weekdays on the main free-to-air television channels. The ratings data analysed are for the period 2003 to the first half of 2013.

The findings are part of the evidence-base used to inform the ACMA's regional commercial television local content investigation.

Key findings

Free-to-air television news audiences have generally declined over the last eleven years, with few exceptions

Average audiences for the majority of early evening television news services broadcast on the main free-to-air television channels have decreased between 2003 and 2013. This is generally apparent across all of the combined regional markets that were assessed (i.e. Regional Queensland, Northern New South Wales, Southern New South Wales, Regional Victoria, Tasmania and Regional Western Australia). However, the extent of the decline varies considerably and ranges from an average 240 to 85,000 fewer viewers of individual news services. The general declining trend applies to both local and metropolitan news services.

There is however also a relatively small number of local and metropolitan news services where average audiences for the combined regional markets have increased by the following amounts:

- > ABC news in Tasmania—an average increase of 13,238 viewers
- > Prime local news in the Orange, Dubbo and Wagga sub-market in Southern New South Wales—an increase of 4,231 viewers
- > TDT Ten news in Tasmania—an increase of 3,958 viewers
- > Ten West news in regional WA—an increase of 2,959 viewers (between 2012 and 2013)
- > Nine news in regional WA—an increase of 399 viewers (between 2010 and 2013)
- > Seven local and metropolitan news services in regional Queensland (primarily due to the expansion of Seven local news into three new sub-markets).

Average audiences for different news services also typically fluctuated up and/or down to varying degrees from year to year which makes some trends difficult to interpret over time. Such fluctuations are especially noticeable at the individual sub-market level and their patterns also vary between sub-markets. While average audiences have declined overall in the combined regional markets, audiences within sub-markets

may have increased, decreased or maintained their numbers at levels close to 2003 which balances out to give an overall declining trend.

News audience numbers increase with age and have generally maintained that pattern over time

Average audience numbers for news services increase with age, an overall trend that is evident in 2012 in all regional markets that are covered in this report. This age trend applies to both local and metropolitan news services and also to news services broadcast in 2003 (albeit at higher audience levels).

Generally, average audiences also declined in each age group between 2003 and 2013. However, audience ratings for some news services remained similar to, or increased from 2003 levels. There are no obvious or consistent patterns except that most increases occur in the older age groups and they mainly relate to metropolitan news services. The news audiences that stayed at 2003 levels or increased in 2013 are those for:

- > Seven news audiences in regional Queensland increased in the 40–54 and 55–64 age groups, with only a minor decline in the 65 and over age group.
- > ABC news is similar to the 2003 level in regional Queensland in the 65 and over age group.
- > Seven news, ABC news and Nine news audiences increased in Southern New South Wales in the 65 and over age group, with increases also for Seven news in the 16–24 and 25–39 age groups. Similar audiences to 2003 were seen in the 40–54 and 55–64 age groups.
- > Seven news in regional Victoria increased in the 65 and over age group.
- > Prime local news in regional Victoria increased in the 16–39 age groups.
- > ABC news, Southern Cross TV news and TDT Ten news increased in Tasmania in the 55–64 and 65 and over age groups. TDT Ten's audience also increased in the 40–54 age group.
- > Nine news and ABC news in regional Western Australia increased slightly in the 40–54 age group, while Ten West news increased in the 55–64 age group.

Local news services are especially popular among the 65 and over age group where they reach highs of 46 per cent of the potential audience in Southern New South Wales (Prime local news), 32 per cent in regional Western Australia (Golden West local news), 27 per cent in regional Victoria (Prime local and WIN local news), 27 per cent in regional Queensland (Seven local news), 25 per cent in Tasmania (WIN local news—presenting both local and metropolitan news) and 17 per cent in Northern New South Wales (NBN Nine news—presenting both local and metropolitan news).

Local news services attract relatively high average news audiences in the majority of regional sub-markets

While average television news audiences have generally declined since 2003, commercial television local news services broadcast in the early evening are almost as popular (and sometimes more popular) than the highest rated metropolitan news services.

In 2012, a local news service rated higher than other news services in the majority of regional sub-markets. This occurred in four of the six sub-markets in regional Queensland, two of the three sub-markets in Northern New South Wales (one of these is a combined local and metropolitan news service), all three sub-markets in Southern New South Wales, four of the five sub-markets in regional Victoria and both sub-markets in Tasmania (which are combined local and metropolitan news services).

The most popular local news service can, however, alternate in different sub-markets where two local services are provided. Two local news services rate first and second with audiences in each of the two sub-markets of Cairns and Rockhampton in regional Queensland.

Despite most local news services being scheduled at different times in sub-markets where two local news services are provided, most viewers appear to stay with local and metropolitan news services that are broadcast on one channel. That is, in these sub-markets one local news service rates either ahead or slightly behind the most popular metropolitan news service. The second local news service and its affiliated metropolitan service rate substantially lower. This occurs in Townsville, Mackay and Maryborough (regional Queensland), Tamworth Taree (Northern New South Wales), Orange Dubbo Wagga (Southern New South Wales), Albury Wodonga (regional Victoria) and Launceston (a combined local and metropolitan service).

There are only two regional sub-markets or markets where local news is not the most popular (or close to the most popular) news service. These are the Northern Rivers sub-market in Northern New South Wales where Seven news and ABC news rate highest with audiences, and in regional Western Australia where a metropolitan news service is rated markedly higher.

Introduction

This report presents average audience numbers for regional Australians who watched early evening television news services. The primary focus of this report is on:

- > average audiences for local news and metropolitan news services that are broadcast for 30 minutes or one hour between 5.00 pm and 7.30 pm weekdays on the main free-to-air television channels (not multichannels)
- > viewing audiences aged zero and above with breakdowns for different age groups
- > 2012 annual data as well as audience trends between 2003 and the first six months of 2013.

The report covers the weekday early evening news services because local news is mainly broadcast at these times Monday to Friday.

Background

On 28 June 2013, the ACMA received a Ministerial Direction (the Direction),¹ directing the ACMA to investigate the operation and effectiveness of section 43A of the *Broadcasting Services Act 1992* (the BSA), which relates to the provision of local content by regional commercial television licensees. The investigation had to be completed by 29 December 2013 and include consideration of:

1. the importance of material of local significance to people living in regional areas of Australia
2. whether people living in regional areas of Australia have adequate access to material of local significance provided via commercial television broadcasting services
3. the impact on people living in regional areas of Australia of recent and significant changes (if any) to the broadcast of material of local significance
4. how access to material of local significance can be maintained and enhanced for people living in regional areas of Australia
5. whether other sources of local (or regional) information are available to people living in regional areas of Australia
6. the economic circumstances facing commercial television broadcasting licensees operating in regional areas of Australia
7. whether section 43A should be extended to apply to commercial television broadcasting licensees operating in specified additional regional areas.

This research and analysis was undertaken by the ACMA with the intention of providing evidence to inform the local content investigation. The key questions addressed by this analysis include:

- > has there been a quantifiable change in television news audience numbers between 2003 and 2013?
- > is there a particular age demographic that prefers to watch local news?
- > how important is local news on television?

The analysis serves to inform the consideration of the importance of local content (in the form of local news on commercial television) to, and the access habits of, regional Australians.

¹ Broadcasting Services (Material of Local Significance – Regional Aggregated Commercial Television Broadcasting Licences) Direction 2013.

Methodology

Source data was provided by RegTAM that collects viewing information using People Meters. Regional television audience data were provided for six regional Australian markets—Queensland, Northern New South Wales, Southern New South Wales, Victoria, Tasmania and Western Australia—and their sub-markets (19 in total). That source data is charted and discussed in this report. The regional sub-markets used by RegTAM are listed in Appendix A. Please note that the sub-markets used by RegTAM are different to the local areas defined in the Broadcasting Services (Additional Television Licence Condition) Notice 8 November 2007.

A number of smaller regional areas are not included in this report as data are not collected by RegTAM. These areas are regional South Australia (Riverland, Mt Gambier and Port Pirie), the Northern Territory, Central Australia and some other locations in Victoria and New South Wales—Griffith (New South Wales), Mildura (Victoria) and Broken Hill (New South Wales). Data are not collected in these areas because they lack sufficient population numbers to warrant the costs associated with People Meter data collection.

In 2013, the RegTAM panel comprises a total sample of 2,135 homes (Queensland 535, Northern New South Wales 475, Southern New South Wales 380, Victoria 435, Tasmania 190 and Regional Western Australia 120) representing a potential regional Australian audience of 7,546,600 individuals.

Definitions

The **average audience (AUD)** ratings used in this report provide an estimation of the average number of people who were watching an early evening news program on the main free-to-air channels.

Two variables make up AUD: cumulative reach (the number of different people who tuned in) and average time spent viewing (the average number of minutes spent viewing). So, AUD may increase if:

- > there are more new viewers watching a program; and/or
- > the same number of viewers is watching for more minutes.

The formula used to calculate AUD is the sum of people watching each minute of the program divided by the sum of minutes viewed.

Consolidated average audience data are provided in this report which includes 'live' and 'playback' viewing. 'Live' viewing captures viewing of the initial broadcast in real time, and 'playback' viewing refers to content watched within seven days of the initial broadcast (also referred to as 'time shift viewing').

Target average rating points or **TARPs** are the average viewing audience for a demographic expressed as a percentage of the relevant Universe Estimate. TARPs provide a more accurate analysis because they take account of population changes from year to year.

Universe estimates are the estimated population against which media audiences are calculated.

News audience trends

Eleven year trends

This chapter presents audience numbers and TARPs for individual local and metropolitan news services (containing state, national and international news) that were broadcast in the early evening timeslots in regional Australia between 2003 and 2013. While audience trends for individual news services varied considerably across the 19 regional sub-markets, overall trends are presented in this chapter for the combined regional markets of Queensland, Northern New South Wales, Southern New South Wales, Victoria, Tasmania and Western Australia. These overall trends provide a summary of audience decreases and increases in these regional markets.

One factor contributing to the overall decline of average news audiences in 2013 is the gradual introduction of digital free-to-air multichannels between 2004 and 2012 (see Appendix B). Another factor is service overlaps into the Newcastle and Northern Rivers sub-markets (northern New South Wales market) from surrounding areas which compete for audiences.

Average audiences for different news services also typically fluctuated up and/or down to varying degrees from year to year which makes some trends difficult to interpret over time. Such fluctuations are especially noticeable at the individual sub-market level and their patterns also vary between sub-markets. While average audiences have declined overall in the combined regional markets, audiences within sub-markets may have increased, decreased or maintained their numbers at levels close to 2003 which balances out to give an overall declining trend.

Television viewing trends generally

It is evident that television viewing of the main free-to-air channels has been declining since the introduction of subscription TV and additional free-to-air digital multichannels. From 2003 the proportion of Australian households with subscription TV increased from about 23 per cent to its current level of 30 per cent. Multichannels have been launched gradually in regional areas between 2004 and 2012.

Time spent viewing data illustrate the impact of subscription TV on free-to-air television viewing in metropolitan cities. Total time spent watching all television—including subscription TV and multichannels—was slightly lower in 2010 (averaging two hours 59 minutes per day) than for free-to-air television prior to 1995 (three hours eight minutes) when subscription TV was introduced. Viewing of free-to-air television in 2010 had declined to two hours and 15 minutes per day, with subscription TV making up most of the shortfall.² In 2012 total television time appears to have increased further, presumably with subscription TV and multichannels contributing more to time spent viewing television in homes.³

Regional and metropolitan television viewers behave in similar ways. In regional television households in 2012, share of viewing free-to-air channels between 6.00 pm and midnight was 84 per cent compared to 16 per cent for subscription TV. This was very similar in the metropolitan cities at 83 per cent and 17 per cent respectively. In 2012, average daily time spent viewing all television in regional locations was higher (three hours 21 minutes) than in metropolitan cities (three hours six minutes). In 2010,

² OzTAM 2005-2010 consolidated annual data, 6.00 am to midnight, Sunday–Saturday, five capital cities, all people, includes multichannels, cited in ACMA 2011 *Digital Australians—Expectations about media content in a converging media environment* (Figure 3, Table 4).

³ OzTAM and RegionalTAM five capital cities and four aggregated regional markets excluding Tasmania and WA, consolidated annual data (ex Easter), 24 hours (2.00 am–2.00 am), all people, based on total television, cited in FreeTV Australia 2013 *Television Year-in-review*, January 2013.

daily viewing time in regional areas was lower (three hours 16 minutes) and slightly higher in metropolitan cities (three hours nine minutes).⁴

In 2013, 92 per cent of surveyed Australians reported watching a news or current affairs program on television in an average week which includes 81 per cent who had watched these programs on commercial free-to-air television, 68 per cent watched them on the ABC or SBS channels and 14 per cent on subscription TV.⁵

Eleven year trends are provided for each of the combined markets, with the exception of regional Western Australia (2010–2013). This difference is due to RegTAM commencing data collection using People Meters in 2010 where these data were previously collected using diaries.

Queensland

The regional Queensland market comprises the six sub-markets of Cairns, Townsville, Mackay, Rockhampton, Maryborough and Toowoomba.

WIN local news was broadcast in every sub-market between 2003 and 2012, while Seven local news was broadcast only in Mackay and Maryborough in 2003 and commenced in Cairns and Townsville in 2004 and Rockhampton in 2011.

Between 2003 and 2013, average audiences declined for all news services in the combined regional Queensland market except for Seven local and Seven metropolitan news services whose audiences have increased markedly. These increases are most likely due to the introduction of Seven local news into three additional sub-markets (i.e. Cairns, Townsville and Rockhampton) over this time. They also coincide with notable audience decreases for WIN local and Nine metropolitan news. This has in effect represented a general shift in news audiences to Seven local and metropolitan news from the WIN and Nine services (see Figure 1).

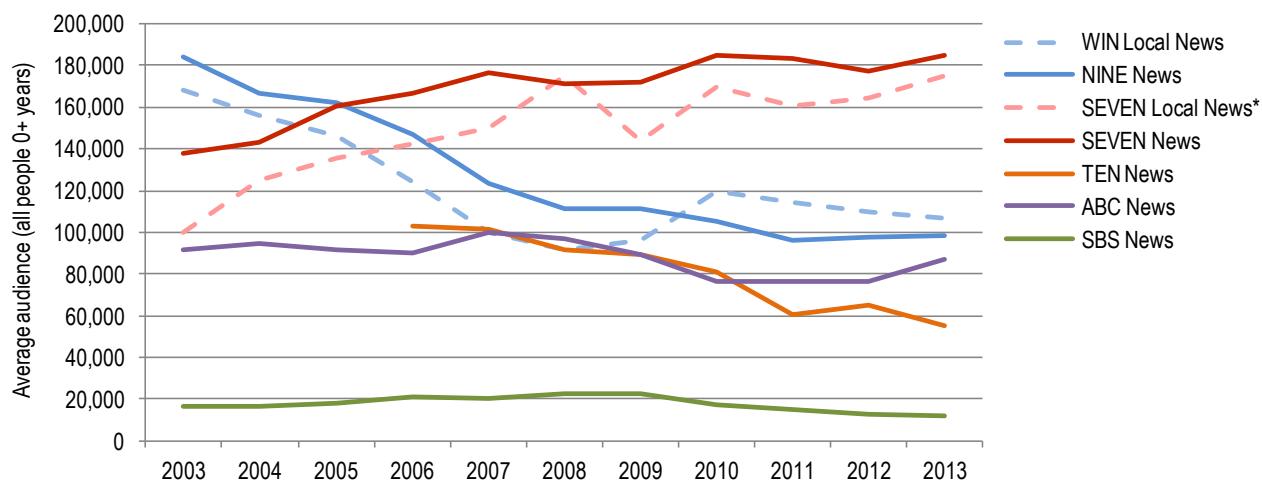
While there is an overall decline in news audiences, the following trends illustrate other variations at the sub-market level in regional Queensland:

- > Seven local news and Seven metropolitan news, while the most popular services, their audiences decreased in Mackay and remained close to 2003 levels in Maryborough. Audiences for WIN local and Nine news increased slightly in Mackay
- > ABC news audiences increased in Cairns, Townsville, Rockhampton and Toowoomba, but decreased in the other two sub-markets of Mackay and Maryborough.

⁴ Ibid. Also note, these average daily viewing amounts are not directly comparable to those referred to in the preceding paragraph because they cover 24 hours per day (2.00 am to 2.00 am) rather than 18 hours per day (i.e. 6.00 am to midnight).

⁵ ACMA 2013 *Community safeguards research* (yet to be published).

Figure 1: Queensland (total)—Audience trends across TV news services, weekdays, 2003–mid-2013



Source: *RegionalTAM data, Average audience across weekday evening news services, 2003–mid-2013, Consolidated*.

Notes: Average audience data for Ten News are not available 2003–2005.

The SBS News audience is averaged across all days of the week 2006–2013.

* SEVEN local news was broadcast in Mackay and Maryborough only in 2003; in all sub-markets except Rockhampton and Toowoomba 2004–2010; and in all sub-markets except Toowoomba in 2012–2013.

The extent to which audiences have decreased between 2003 and 2013 range considerably for each news service from an average 4,671 to 85,764 fewer viewers in regional Queensland (Table 1).

Table 1 also shows declines in TARP measurements where the average audience for each service is calculated as a percentage of the universe estimate in regional Queensland for a particular year. TARPs take into account annual population increases and confirm the declines that are shown by average audiences. For instance, the TARPs for WIN local news declined from 11.7 per cent in 2003 to six per cent in 2013.

Table 1: Comparison of average news audiences, regional Queensland 2003–mid-2013

News service	2003		2013		
	Av. audience	TARP%	Av. audience	TARP%	Av. audience change
WIN local news	168,127	11.7	107,069	6.0	-61,058
Nine news	184,035	12.8	98,271	5.5	-85,764
Seven local news#	100,352	16.4	174,795	11.2	+74,443
Seven news	137,793	9.6	185,099	10.3	+47,306
Ten news*	103,373	6.1	55,412	3.1	-47,961
ABC news	91,853	6.4	86,982	4.8	-4,871
SBS news	16,805	1.2	12,284	<0.1	-4,521

Source: RegionalTAM data, Average audience across weekday early evening news services, 2003, 2006 and 2013, Consolidated. Universe estimates used: 1,440,203 (2003); 1,796,100 (2013).

TARP% – average news viewers calculated as a proportion of the relevant Universe Estimate.

Seven local news was broadcast in Mackay and Maryborough only in 2003 (universe estimate: 612,143); and all sub-markets except Toowoomba in 2013 (universe estimate: 1,560,000).

* 2006 instead of 2003 data are used for Ten news (universe estimate: 1,697,118).

Northern New South Wales

The Northern New South Wales market comprises the three sub-markets of Newcastle, Tamworth-Taree and Northern Rivers.

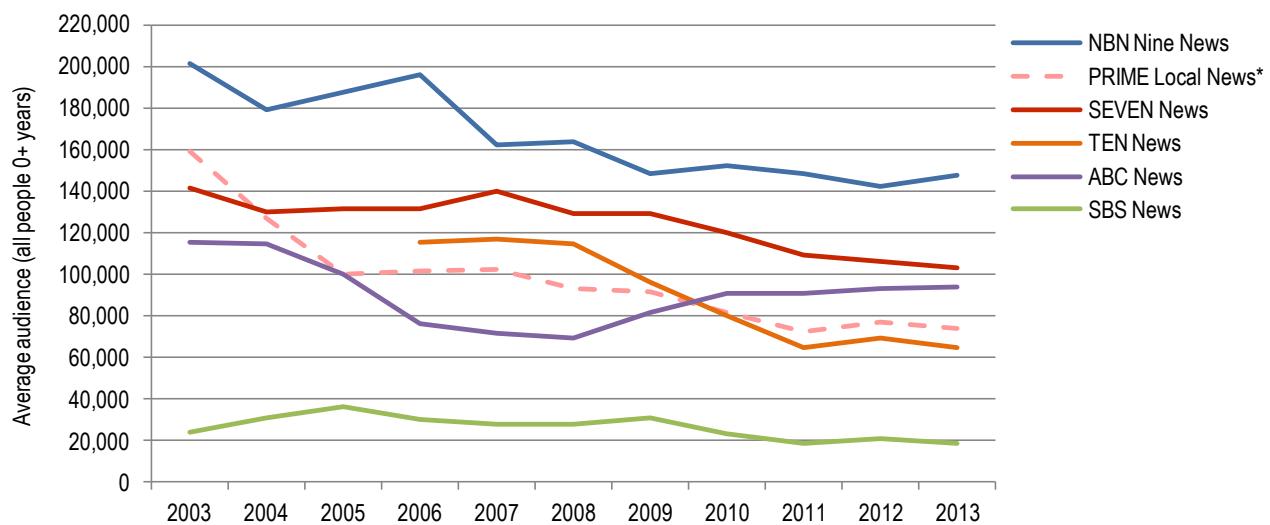
NBN Nine news provides a local news service in each sub-market of Northern New South Wales. NBN Nine news runs for 60 minutes from 6:00 pm and includes both local and metropolitan news.⁶ Prime local news is provided in each sub-market except for Newcastle.

Average audiences for each evening television news service declined in Northern New South Wales over the last 11 years, with some recovery over that time for ABC news since its lowest points in 2006–2009 (see Figure 2).

Audiences declined for each service in the Newcastle and Northern Rivers sub-markets, but small increases occurred for NBN Nine news, ABC news and SBS news in Tamworth Taree. Audiences in northern New South Wales are affected by significant metropolitan overlaps in the Northern Rivers (Gold Coast transmitters) and Newcastle (Central Coast transmitters) which may lower their audiences due to this metropolitan competition.

⁶ Regional TAM data does not separate local from national news audiences.

Figure 2: Northern NSW (total)—Audience trends across TV news services, weekdays, 2003–mid-2013



Source: *RegionalTAM data, Average audience across weekday evening news services, 2003–mid-2013, Consolidated*.

Notes: Average audience data for Ten News are not available 2003–2005.

The SBS News audience is averaged across all days of the week 2006–2013.

* PRIME local news was not broadcast in the Newcastle sub-market.

The extent to which average audiences decreased from 2003 to 2013 range considerably for each news service from an average 5,185 to 85,000 fewer viewers in northern New South Wales. All services also recorded declining TARPs with NBN Nine news dropping from 10.9 per cent to seven per cent of the potential audience and Prime local news declining from 14 per cent to six per cent (see Table 2).

Table 2: Comparison of average news audiences, Northern New South Wales, 2003–mid-2013

News service	2003		2013		
	Av. audience	TARP%	Av. audience	TARP%	Av. audience change
NBN Nine news	201,243	10.9	147,479	7.0	-53,764
Prime local news#	158,688	14.0	73,688	5.5	-85,000
Seven news	141,124	7.6	102,817	4.9	-38,307
Ten news*	115,460	6.1	64,774	3.1	-50,686
ABC news	115,592	6.3	94,138	4.5	-21,454
SBS news	23,634	1.3	18,449	0.9	-5,185

Source: *RegionalTAM data, Average audience across weekday early evening news services, 2003, 2006 and 2013, Consolidated*.

Universe estimates used: 1,849,251 (2003); 2,110,400 (2013).

TARP% – average news viewers calculated as a proportion of the relevant Universe Estimate.

Prime local news was broadcast all sub-markets except Newcastle in 2003 (universe estimate: 1,137,203) and 2013 (universe estimate: 1,330,600).

* 2006 instead of 2003 data are used for Ten news (universe estimate: 1,907,077).

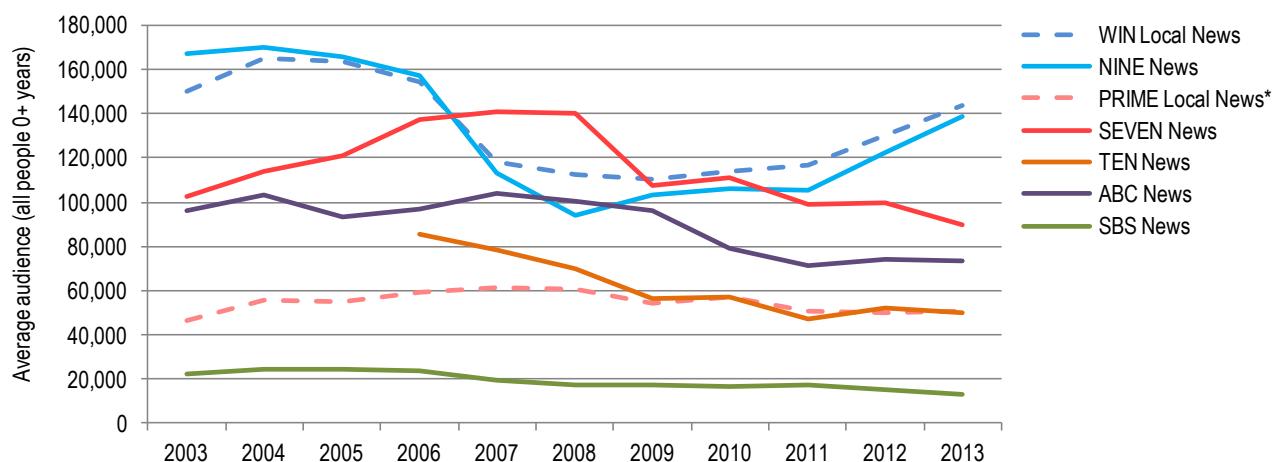
Southern New South Wales

The Southern New South Wales market comprises three sub-markets of Canberra, Wollongong and Orange Dubbo Wagga.

Prime local news is only broadcast in the Orange-Dubbo-Wagga sub-market and is the only news service showing an average audience increase of 4,231 viewers in Southern New South Wales. Audiences of other news services in Southern New South Wales declined by an average 6,185 to 34,823 fewer viewers (see Figure 3 and Table 3).

Considerable fluctuations are evident for evening news audiences in Southern New South Wales, especially for the WIN local, Nine, Prime local and Seven services. Declines for the ABC, Ten and SBS news services have been more consistent. Average audiences for WIN local and Nine news recovered in 2013 to 2003 levels in Wollongong, while ABC news recovered in Orange-Dubbo-Wagga.

Figure 3: Southern NSW (total)—Audience trends across TV news services, weekdays, 2003–mid-2013



Source: *RegionalTAM data, Average audience across weekday evening news services, 2003–mid-2013, Consolidated.*

Notes: Average audience data for Ten News are not available 2003–2005.

The SBS News audience is averaged across all days of the week 2006–2013.

* PRIME local news was only broadcast in the Orange Dubbo Wagga sub-market.

Table 3: Comparison of average news audiences, Southern New South Wales, 2003–mid-2013

News service	2003		2013		
	Av. audience	TARP%	Av. audience	TARP%	Av. audience change
WIN local news	150,324	11.3	144,139	10.1	-6,185
Nine news	167,080	12.6	138,651	9.7	-28,429
Prime local news#	46,509	11.8	50,740	12.4	+4,231
Seven news	102,290	7.7	90,038	6.3	-12,252
Ten news*	85,211	6.4	50,388	3.5	-34,823
ABC news	95,883	7.2	73,676	5.1	-22,207
SBS news	22,464	1.7	13,002	0.9	-9,462

Source: *RegionalTAM data, Average audience across weekday early evening news services, 2003, 2006 and 2013, Consolidated*. Universe estimates used: 1,329,048 (2003); 1,431,400 (2013).

TARP% – average news viewers calculated as a proportion of the relevant Universe Estimate.

Prime local news was broadcast in Orange Dubbo Wagga only in 2003 (universe estimate: 395,012) and 2013 (universe estimate: 409,000).

* 2006 instead of 2003 data are used for Ten news (universe estimate: 1,333,025).

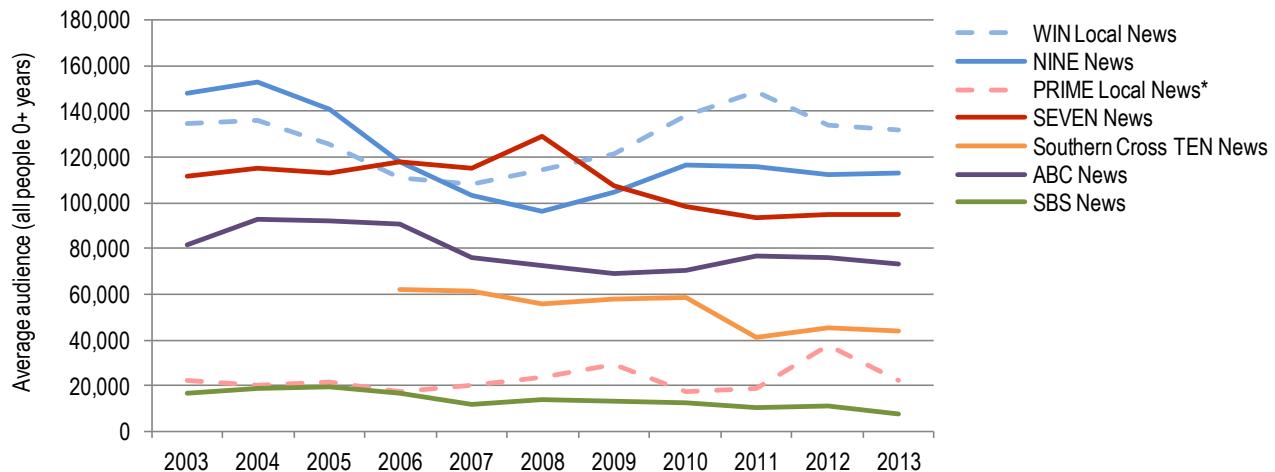
Victoria

Regional Victoria has five sub-markets in Albury-Wodonga, Shepparton, Bendigo, Ballarat and Gippsland. Prime local news is only broadcast in Albury-Wodonga.

Average audiences declined for each weekday evening news service in Victoria with the decline ranging from an average 241 to 34,939 fewer viewers (see Figure 4 and Table 4). However, audience numbers increased or remained at 2003 levels in the following sub-markets:

- > average audience numbers increased most notably for WIN local news in the Gippsland sub-market where this service clearly exceeded 2003 levels. Seven news and Southern Cross Ten news also increased in Gippsland.
- > Seven local news and WIN local news in the Albury-Wodonga market have similar average audience numbers to 2003 levels, albeit with considerable fluctuations between 2003 and 2013.

Figure 4: Victoria (total)—Audience trends across TV news services, weekdays, 2003–mid-2013



Source: RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.

*PRIME local news is only broadcast in the Albury Wodonga sub-market.

Table 4: Comparison of average news audiences, regional Victoria 2003–mid-2013

News service	2003		2013		Av. audience change
	Av. audience	TARP%	Av. audience	TARP%	
WIN local news	134,581	12.5	131,634	11.1	-2,947
Nine news	147,735	13.7	112,796	9.5	-34,939
Prime local news#	22,411	12.9	22,170	11.7	-241
Seven news	111,625	10.4	95,188	8.0	-16,437
Southern Cross Ten news*	61,895	5.7	43,782	3.7	-18,113
ABC news	81,379	7.5	73,322	6.2	-8,057
SBS news	16,453	1.5	7,784	0.7	-8,669

Source: RegionalTAM data, Average audience across weekday early evening news services, 2003, 2006 and 2013, Consolidated.

Universe estimates used: 1,078,072 (2003); 1,183,800 (2013).

TARP% – average news viewers calculated as a proportion of the relevant Universe Estimate.

Prime local news was broadcast in Albury Wodonga only in 2003 (universe estimate: 174,013) and 2013 (universe estimate: 189,000).

* 2006 instead of 2003 data are used for Ten news (universe estimate: 1,094,033).

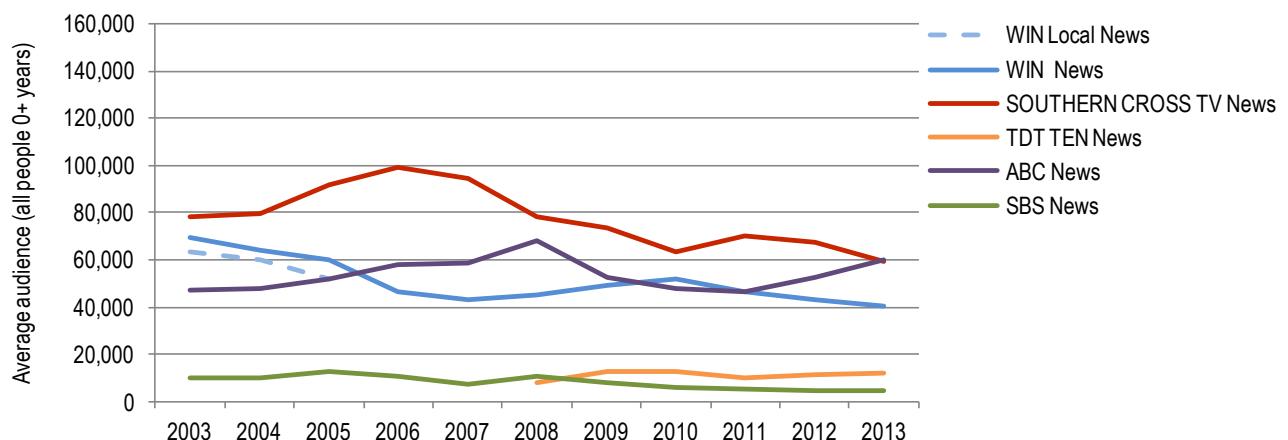
Tasmania

Tasmania includes the Hobart and Launceston sub-markets. WIN news and Southern Cross TV news provide a mix of local and metropolitan news content in these sub-markets.

Average audiences for most news services in Tasmania declined by an average 5,560 to 29,055 fewer viewers. ABC news and TDT Ten news were exceptions with increases of 13,238 and 3,958 (2008–2013) viewers respectively (see Figure 5 and Table 5). ABC news audiences have increased somewhat over the last 11 years, with

this increase most evident in the Launceston sub-market. TDT Ten news has largely maintained its average audience numbers since 2009, with most of this increase occurring in the Hobart sub-market.

Figure 5: Tasmania (total)—Audience trends across TV news services, weekdays, 2003–mid-2013



Source: *RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.*
TEN News includes weekday and weekend news services 2008, 2011–2013.

Table 5: Comparison of average news audiences, Tasmania 2003–mid-2013

News service	2003		2013		
	Av. audience	TARP%	Av. audience	TARP%	Av. audience change
WIN local news	63,471	13.3	-	-	-
WIN news	69,597	14.6	40,542	7.8	-29,055
SOUTHERN CROSS TV news	78,025	16.4	59,080	11.4	-18,945
TDT Ten news*	7,790	1.6	11,748	2.3	+3,958
ABC news	46,800	9.8	60,038	11.6	+13,238
SBS news	10,255	2.1	4,695	0.9	-5,560

Source: *RegionalTAM data, Average audience across weekday early evening news services, 2003, 2008 and 2013, Consolidated.*
Universe estimates used: 477,000 (2003); 518,000 (2013).

TARP% – average news viewers calculated as a proportion of the relevant Universe Estimate.

WIN local news was not reported from 2006.

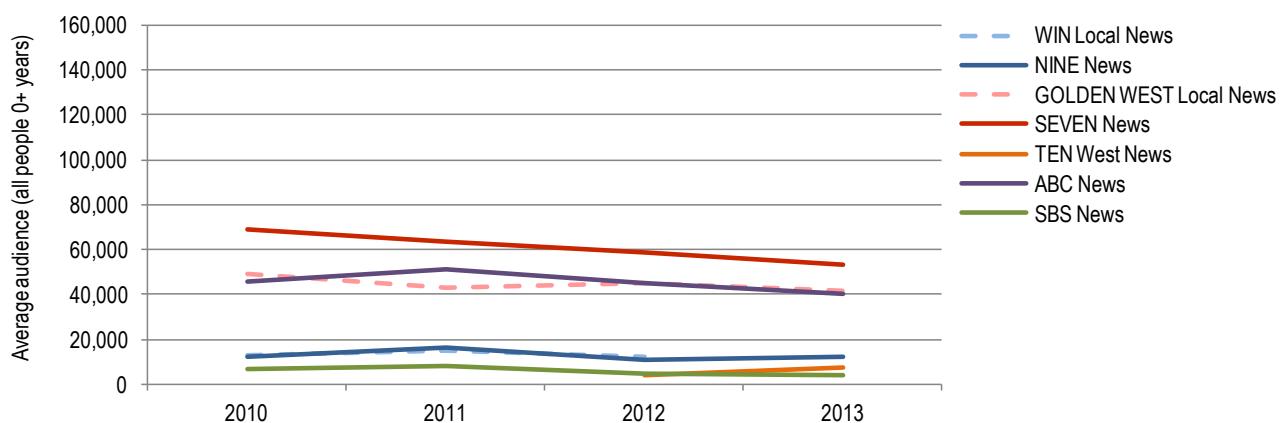
* 2008 instead of 2003 data are used for TDT Ten news (universe estimate: 495,055).

Western Australia

Average audiences for most news services in regional WA declined by an average 2,729 to 15,568 fewer viewers. However Ten West news and Nine news increased by 2,959 (2012–2013) and 399 (2010–2013) viewers respectively.

WIN local news appears to have ceased broadcasting after 2012 and in that year had an average audience of 12,113.

Figure 6: Western Australia—Audience trends across TV news services, weekdays, 2010–mid-2013



Source: RegionalTAM data, Average audience across weekday evening news services, 2003–mid-2013, Consolidated.

Average audience data for WIN Local News are not available in 2013.

Reporting for TEN West News began in February 2012.

The SBS News audience is averaged across all days of the week.

Table 6: Comparison of average news audiences, regional Western Australia 2003–mid-2013

News service	2010		2013		
	Av. audience	TARP%	Av. audience	TARP%	Av. audience change
WIN local news	13,162	2.7	-	-	-
Nine news	11,874	2.5	12,273	2.4	+399
GOLDEN WEST local news#	48,856	10.1	41,441	8.2	-7,415
Seven news	68,789	14.3	53,221	10.5	-15,568
Ten West news*	4,129	0.8	7,088	1.4	+2,959
ABC news	45,777	9.5	40,089	7.9	-5,688
SBS news	6,557	1.4	3,828	0.8	-2,729

Source: RegionalTAM data, Average audience across weekday early evening news services, 2010, 2012 and 2013, Consolidated.

Universe estimates used: 482,656 (2010); 506,900 (2013).

TARP% – average news viewers calculated as a proportion of the relevant Universe Estimate.

WIN local news was not reported in 2013.

* 2012 instead of 2003 data are used for Ten news (universe estimate: 505,010).

Age of news viewers

Average audience numbers for news services increase with age, an overall trend that is evident in 2012 and 2013 in all regional markets that are covered in this report. This age trend applies to both local and metropolitan news services (containing state, national and international news) and also to news services broadcast in 2003 (albeit at generally higher audience levels).

Generally, average audiences declined in each age group between 2003 and 2013. However, audiences for some news services and in some age groups remained similar to, or increased from 2003 levels. There are no obvious or consistent patterns except that most increases occur in the older age groups and they mainly relate to metropolitan news services. The news audiences that stayed at 2003 levels or increased in 2013 are those for:

- > Seven news audiences in regional Queensland increased in the 40–54 and 55–64 age groups with only a minor decline in the 65 and over age group.
- > ABC news is similar to the 2003 level in regional Queensland in the 65 and over age group.
- > Seven news, ABC news and Nine news increased in Southern New South Wales in the 65 and over age group, with increases also for Seven news in the 16–24 and 25–39 age groups. Similar audiences to 2003 were seen in the 40–54 and 55–64 age groups.
- > Seven news in regional Victoria increased in the 65 and over age group.
- > Prime local news in regional Victoria increased in the 16–39 age groups.
- > ABC news, Southern Cross TV news and TDT Ten news increased in Tasmania in the 55–64 and 65 and over age groups. TDT Ten's audience also increased in the 40–54 age group.
- > Nine news and ABC news in regional WA increased slightly in the 40–54 age group, while Ten West news increased in the 55–64 age group.

Average audience increases or audiences that have remained close to 2003 levels are shown in red in the tables in this chapter.

Television viewing by age

Older Australians watch more television generally. Average time spent viewing free-to-air television in 2010 is lowest in the 18–24 age group and increases for each subsequent age group until it reaches more than three times that amount for viewers age 65 years and over.⁷

A similar increase is identified in 2012 for total television viewing with the 65 and over age group watching just over three times more television in the home compared with the 18–24 age group.⁸

Queensland

The 16–24 year age group has the lowest audiences for early evening news services, and average audiences then generally increase with each older age group. However, Seven news attracts most viewers in the 40–54 age group. The 65 and over age group

⁷ OzTAM 2010 consolidated annual data, 6.00 am to midnight, Sunday–Saturday, five capital cities, all people, includes multichannels, cited in ACMA 2011 *Digital Australians—Expectations about media content in a converging media environment* (Figure 4).

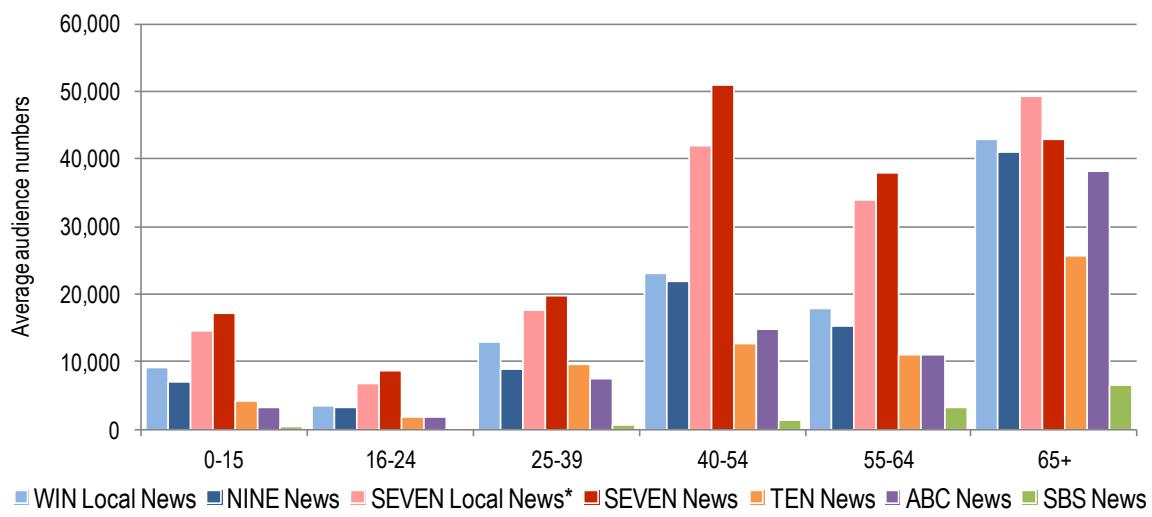
⁸ Australian Multi-Screen Report Q3 2012, based on monthly average time spent viewing, cited in FreeTV Australia 2013 *Television Year-in-review*, January 2013.

also attracts particularly high numbers for many services including Seven local news, Seven news, WIN local news, Nine news and ABC news. There is, however, a dip for most news services by viewers aged 55–64 (see Figure 7).

Average audiences aged 40–64 years increased between 2003 and 2013 for Seven news with only a minor decline in the 65 and over group. The average ABC news audience aged 65 and over has remained at the same level in 2013 as it was in 2003 (see Table 7).

Sample sizes are small for individual age groups and may account for some of the age variations.

Figure 7: Queensland (total)—Evening TV news audiences by age group, weekdays, 2012



■ WIN Local News ■ NINE News ■ SEVEN Local News* ■ SEVEN News ■ TEN News ■ ABC News ■ SBS News

Source: *RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.*

* SEVEN local news was broadcast in all sub-markets except Toowoomba.

Table 7: Comparison of average news audiences by age group, regional Queensland 2003–mid-2013

News service	TARP%						
	2003	0–15	16–24	25–39	40–54	55–64	65+
WIN local news	4.6	3.7	8.0	11.6	23.9	27.2	
Nine news	5.9	3.8	9.8	13.1	24.0	28.0	
Seven local news#	6.1	5.2	11.3	16.1	24.5	38.8	
Seven news	4.4	4.1	7.9	11.1	13.3	20.7	
Ten news*	2.3	2.8	5.8	5.6	10.8	17.7	
ABC news	1.8	1.5	2.4	6.9	16.3	16.1	
SBS news	0.3	0.4	0.9	1.6	2.2	2.2	
2013							
WIN local news	1.4	1.7	3.8	5.5	9.8	16.4	
Nine news	1.2	1.4	2.6	5.1	9.1	16.4	

Seven local news#	4.5	3.2	6.0	13.4	17.5	26.9
Seven news	4.1	3.5	5.8	14.1	17.4	19.5
Ten news*	1.0	1.1	2.3	3.6	5.3	10.2
ABC news	0.6	1.0	2.2	5.2	6.1	16.1
SBS news	0.1	0.2	0.3	0.5	1.6	2.0

Source: RegionalTAM data, Average audience across weekday early evening news services, 2003, 2006 and 2013, Consolidated. TARP% – average news viewers calculated as a proportion of the relevant Universe Estimate.

Seven local news was broadcast in Mackay and Maryborough only in 2003, and all sub-markets except Toowoomba in 2013.

* 2006 instead of 2003 data are used for Ten news.

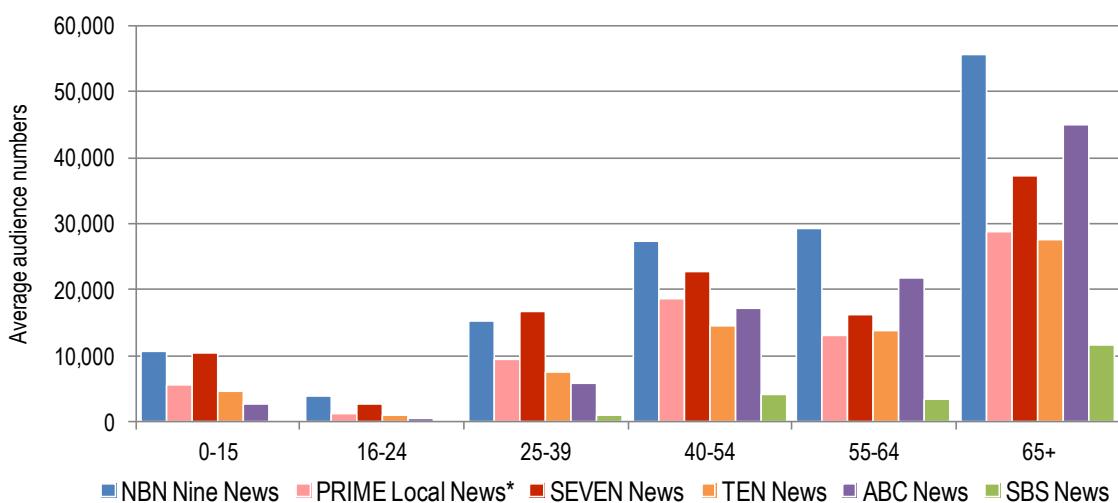
Red figures identify increases between 2003 and 2013 or similar audiences between those years.

Northern New South Wales

Average audiences generally increased with age, and average audience numbers have not increased in any particular age group between 2003 and 2013.

Sample sizes are small for individual age groups and may account for some of the age variations.

Figure 8: Northern NSW (total)—Evening TV news audiences by age group, weekdays, 2012



Source: RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.

*PRIME local news was not broadcast in the Newcastle sub-market.

Table 8: Comparison of average news audiences by age group, Northern New South Wales, 2003–mid-2013

News service	TARP%						
	2003	0-15	16-24	25-39	40-54	55-64	65+
NBN Nine news	4.3	3.5	7.3	9.7	20.4	24.2	
Prime local news#	5.9	7.7	8.1	14.1	17.4	31.3	
Seven news	4.3	3.0	5.1	8.7	9.8	15.5	
Ten news*	2.1	2.9	4.7	6.1	7.9	13.2	

ABC news	1.1	1.3	1.9	4.8	12.0	19.9
SBS news	0.3	0.5	0.9	1.3	2.1	3.0
2013						
NBN Nine news	2.2	1.5	3.5	7.2	10.6	16.9
Prime local news#	1.5	1.2	2.7	6.0	5.9	11.9
Seven news	1.7	1.7	3.2	5.0	7.7	10.1
Ten news*	1.0	0.6	1.5	3.6	4.7	6.9
ABC news	0.8	0.3	1.7	3.2	7.8	13.4
SBS news	0.1	0.1	0.2	0.8	1.2	2.9

Source: *RegionalTAM data, Average audience across weekday early evening news services, 2003, 2006 and 2013, Consolidated.*

TARP% – average news viewers calculated as a proportion of the relevant Universe Estimate.

Prime local news was broadcast in all sub-markets except Toowoomba in 2003 and 2013.

* 2006 instead of 2003 data are used for Ten news.

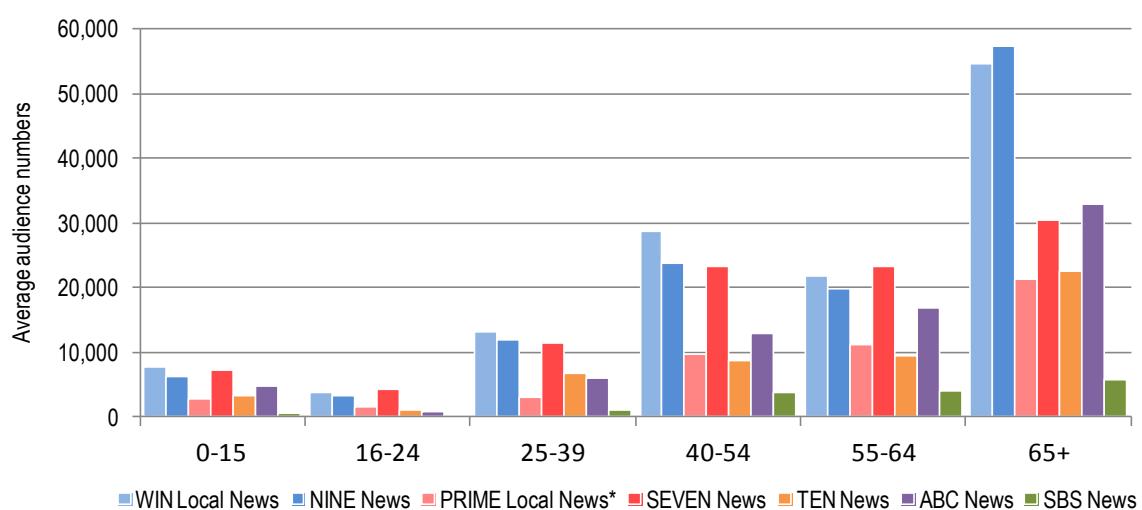
Southern New South Wales

Viewing numbers also tend to increase with age in Southern New South Wales, however, increases for Seven news in the 65 and over age group are considerably less than in each of the younger age groups (see Figure 9).

Audience ratings for the 65 and over age group increased substantially for Seven news in 2013 compared to 2003 (23 per cent from 16 per cent), and for ABC news (15 per cent from eight per cent). There were minor increases also in the 65 and over group for Nine news, and for Seven news in the 16–24 and 25–39 age groups (see Table 9).

Sample sizes are small for individual age groups and may account for some of the age variations.

Figure 9: Southern NSW (total)—Evening TV news audiences by age group, weekdays, 2012



Source: *RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.*

* PRIME local news only broadcast in Orange Dubbo Wagga sub-market.

Table 9: Comparison of average news audiences by age group, Southern New South Wales, 2003–mid-2013

News service	TARP%						
	2003	0-15	16-24	25-39	40-54	55-64	65+
WIN local news	3.6	4.0	6.7	11.0	20.7	31.2	
Nine news	5.4	4.6	8.8	13.2	22.4	29.0	
Prime local news#	12.8	8.9	13.7	28.8	30.5	66.2	
Seven news	3.5	2.7	5.5	8.7	13.7	16.3	
Ten news*	2.1	2.6	5.2	5.6	11.4	14.5	
ABC news	2.9	1.3	5.3	6.2	12.9	7.5	
SBS news	0.7	0.2	1.5	1.6	1.9	5.0	
2013							
WIN local news	3.5	1.7	5.0	9.9	13.5	28.9	
Nine news	2.7	1.2	4.4	8.7	12.2	31.2	
Prime local news#	5.3	3.2	11.1	19.6	22.9	45.9	
Seven news	3.1	4.4	6.6	8.2	13.0	23.4	
Ten news*	1.2	0.8	2.4	3.3	3.2	10.6	
ABC news	1.7	0.6	1.6	5.0	8.7	14.8	
SBS news	0.1	0.04	0.4	1.3	1.7	2.1	

Source: RegionalTAM data, Average audience across weekday early evening news services, 2003, 2006 and 2013, Consolidated.

TARP% – average news viewers calculated as a proportion of the relevant Universe Estimate.

Prime local news was broadcast in Orange Dubbo Wagga only in 2003 and 2013.

* 2006 instead of 2003 data are used for Ten news.

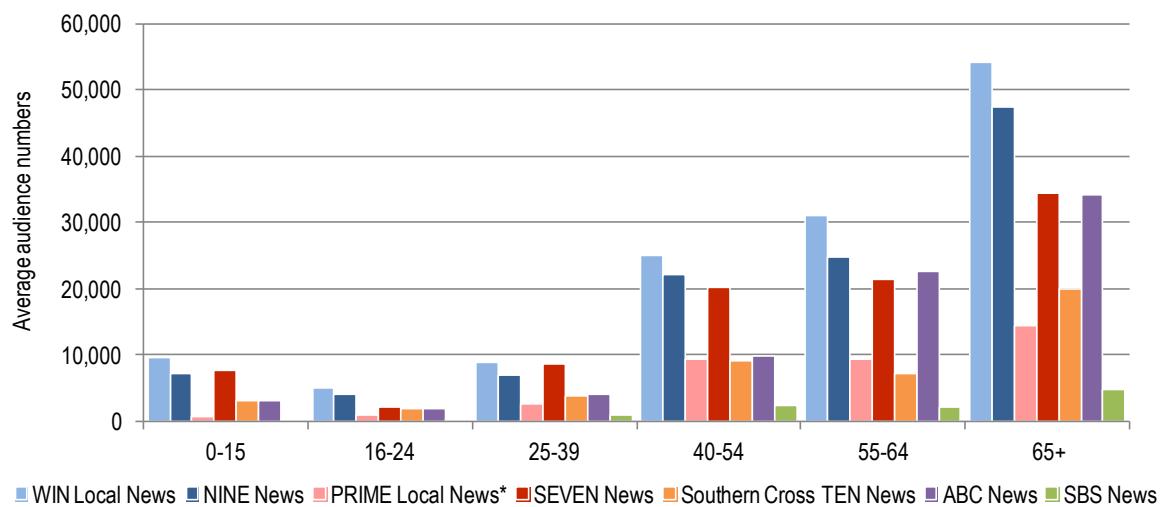
Red figures identify increases between 2003 and 2013 or similar audiences between those years.

Victoria

Average audience numbers also increased with age in regional Victoria (see Figure 10). There were also increases between 2003 and 2013 for Prime local news in the 16–39 age group, and for Seven news in the 65 years and over group (see Table 10).

Sample sizes are small for individual age groups and may account for some of the age variations.

Figure 10: Victoria (total)—Evening TV news audiences by age group, weekdays, 2012



Source: *RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.*

*PRIME local news is only broadcast in the Albury Wodonga sub-market.

Table 10: Comparison of average news audiences by age group, regional Victoria 2003–mid-2013

News service	TARP%						
	2003	0-15	16-24	25-39	40-54	55-64	65+
WIN local news	4.9	4.3	5.7	11.5	22.1	31.7	
Nine news	7.1	5.3	8.3	15.5	22.9	26.5	
Prime local news#	5.6	2.6	7.0	14.3	17.7	34.2	
Seven news	5.4	4.2	8.0	12.3	18.8	16.0	
Southern Cross Ten news*	3.0	1.7	4.7	4.0	7.4	14.0	
ABC news	2.2	2.0	2.8	7.2	14.7	20.5	
SBS news	0.3	0.6	0.8	1.6	2.6	3.9	
2013							
WIN local news	4.1	2.5	5.2	9.3	18.1	27.0	
Nine news	2.8	2.3	3.7	8.7	14.9	24.3	
Prime local news#	0.2	4.2	7.1	14.1	15.2	29.9	
Seven news	2.8	1.9	4.6	8.9	11.0	17.9	
Southern Cross Ten news*	1.1	1.6	1.8	3.5	3.9	9.8	
ABC news	1.3	0.8	1.8	3.4	13.0	17.4	
SBS news	0.1	0.1	0.2	0.8	1.2	1.4	

Source: RegionalTAM data, Average audience across weekday early evening news services, 2003, 2006 and 2013, Consolidated.

TARP% – average news viewers calculated as a proportion of the relevant Universe Estimate.

Prime local news was broadcast in Albury Wodonga only between 2003 and 2013.

* 2006 instead of 2003 data are used for Ten news.

Red figures identify increases between 2003 and 2013 or similar audiences between those years.

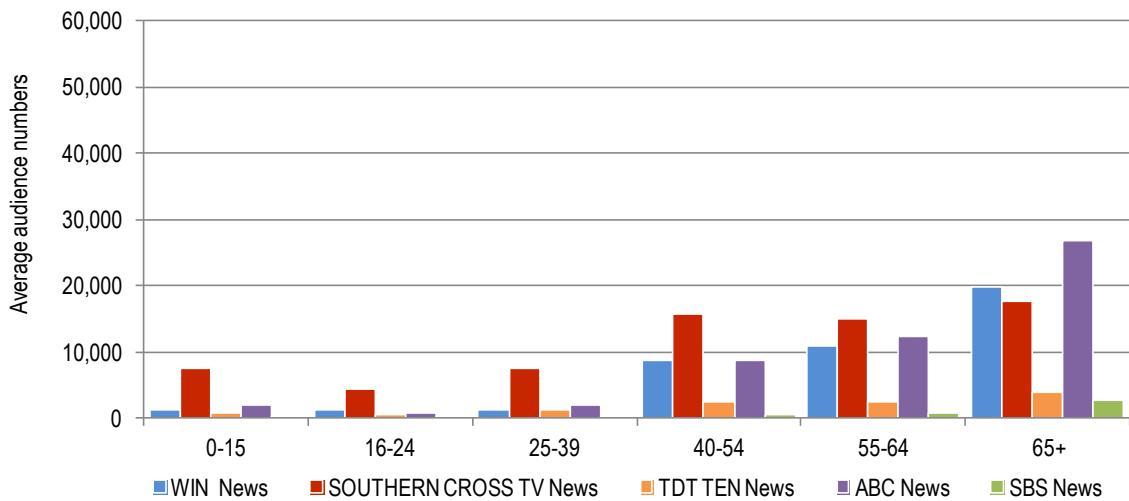
Tasmania

ABC news was considerably more popular and TDT Ten news less popular in the 65 and over age group compared to other age groups. However, the general trend of higher audiences with increasing age still applies (see Figure 11).

ABC news, Southern Cross TV news and TDT Ten news increased in Tasmania in the 55–64 and 65 and over age groups, while TDT Ten's audience also increased in the 40–54 age group (see Table 11).

Sample sizes are small for individual age groups and may account for some of the age variations.

Figure 11: Tasmania (total)—Evening TV news audiences by age group, weekdays, 2012



Source: *RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.*
TEN News includes weekday and weekend news services.

Table 11: Comparison of average news audiences by age group, Tasmania 2003–mid-2013

News service	TARP%						
	2003	0-15	16-24	25-39	40-54	55-64	65+
WIN local news	5.6	4.0	7.6	11.8	24.8	33.8	
WIN news	6.1	4.3	9.9	14.3	26.7	33.3	
SOUTHERN CROSS TV news	15.2	12.5	18.3	16.7	17.9	16.9	
TDT Ten news*	0.7	0.4	1.7	0.7	3.2	3.4	
ABC news	3.0	1.9	3.4	10.7	17.9	27.6	
SBS news	0.5	0.4	0.6	1.9	4.3	6.7	
2013							
WIN local news							
WIN news	0.8	1.4	1.1	8.1	12.1	24.5	
SOUTHERN CROSS TV news	5.6	5.5	6.9	14.6	18.5	17.5	
TDT Ten news*	1.0	1.1	1.1	2.3	4.0	4.5	
ABC news	1.9	1.0	2.2	9.2	19.5	37.5	
SBS news	0.2	0.1	0.3	0.4	1.3	3.3	

Source: *RegionalTAM data, Average audience across weekday early evening news services, 2003, 2008 and 2013, Consolidated.*
TARP% – average news viewers calculated as a proportion of the relevant Universe Estimate.

* 2008 instead of 2003 data are used for TDT Ten news.

Red figures identify increases between 2003 and 2013 or similar audiences between those years.

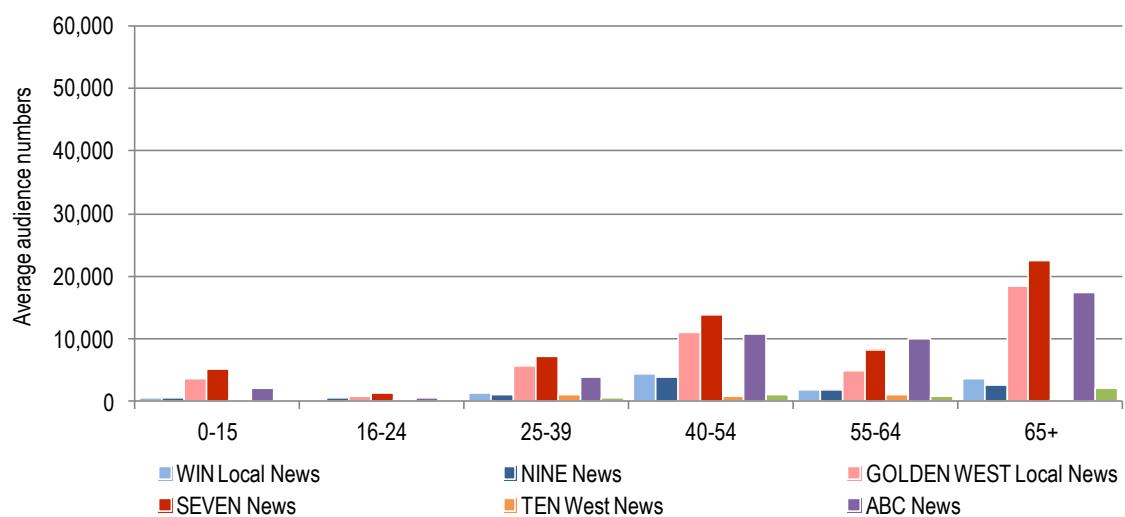
Western Australia

Average news audiences generally increased with age in Western Australia (see Figure 12).

Audience ratings increased slightly between 2003 and 2013 for Nine news in the 40–54 age groups and for ABC news in the 55–64 age group.

Sample sizes are small for individual age groups and may account for some of the age variations.

Figure 12: Western Australia (total)—Evening TV news audiences by age group, weekdays, 2012



Source: *RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated*.

Table 12: Comparison of average news audiences by age group, regional WA 2010–mid-2013

News service	TARP%						
	2010	0-15	16-24	25-39	40-54	55-64	65+
WIN local news	1.0	0.6	2.3	3.1	6.1	5.2	
Nine news	0.7	0.7	2.4	2.4	5.4	5.1	
GOLDEN WEST local news#	2.4	3.5	6.5	10.3	16.0	33.4	
Seven news	6.1	3.4	9.5	15.8	22.7	39.6	
Ten West news*	0.3	0.2	1.2	0.8	1.9	0.8	
ABC news	3.5	0.8	4.0	7.7	19.3	40.0	
SBS news	0.4	0.3	0.6	2.5	2.4	2.7	
2013							
WIN local news	-	-	-	-	-	-	
Nine news	0.6	0.3	2.6	3.6	2.9	5.0	

GOLDEN WEST local news#	1.7	1.1	5.7	9.7	6.6	31.3
Seven news	2.8	1.8	6.8	11.8	11.3	38.0
Ten West news*	0.3	0.2	3.3	0.6	2.9	0.9
ABC news	2.7	0.7	2.0	9.7	16.1	24.8
SBS news	0.1	0.1	0.2	1.0	1.1	2.9

Source: *RegionalTAM data, Average audience across weekday early evening news services, 2010, 2012 and 2013, Consolidated.*

TARP% – average news viewers calculated as a proportion of the relevant Universe Estimate.

* 2012 instead of 2003 data are used for Ten West news.

Red figures identify increases between 2003 and 2013 or similar audiences between those years.

Importance of local television news

In this chapter, average audience data is presented for individual news services in each of the regional sub-markets. Out of the total 19 sub-markets, nine provide one local news service and 11 have two local news services (see Appendix A). In sub-markets where two local news services are broadcast they are generally scheduled at different times.

While average television news audiences have declined since 2003, the commercial television local news services broadcast on free-to-air television in the early evening are almost as popular (and sometimes more popular) than the highest rated metropolitan news services (containing state, national and international news). There are only a couple of sub-markets where local news is not so highly rated.

In addition to the general popularity of local news services, they are also especially popular among the 65 and over age group where they reach highs of 46 per cent of the potential audience in Southern New South Wales (Prime local news), 32 per cent in regional Western Australia (Golden West local news), 27 per cent in regional Victoria (Prime local and WIN local news), 27 per cent in regional Queensland (Seven local news), 25 per cent in Tasmania (WIN local news—presenting both local and metropolitan news) and 17 per cent in Northern New South Wales (NBN Nine news—presenting both local and metropolitan news).

Queensland

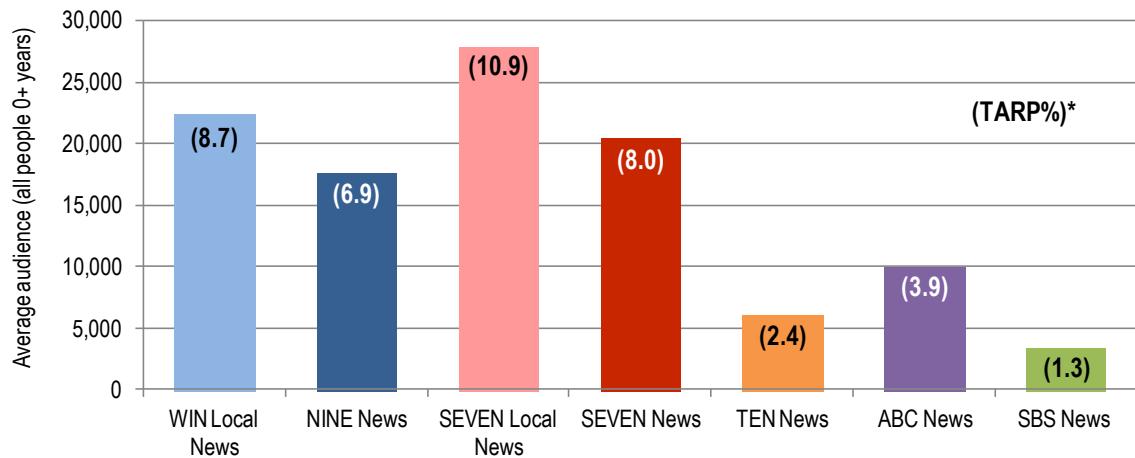
WIN local news was broadcast in every regional Queensland sub-market in 2012, while Seven local news was broadcast in every sub-market except for Toowoomba.

Some key observations are:

- > Seven local and Seven national news services had the largest average audiences in the regional Queensland market.
- > In Cairns and Rockhampton, Seven local and WIN local news services achieved larger audiences than their respective national news services, with Seven local news being more popular in Cairns and WIN local news more popular in Rockhampton.
- > Seven local and national news services had the largest audiences in Townsville, Mackay and Maryborough, while WIN local news achieved similar or slightly higher audiences than Seven in Rockhampton. WIN local news was the most popular news service in Toowoomba (however, only WIN local news was available in Toowoomba).

See Figures 13 to 18 for sub-market audience ratings in regional Queensland.

Figure 13: Cairns—Average audiences across evening TV news services, weekdays, 2012

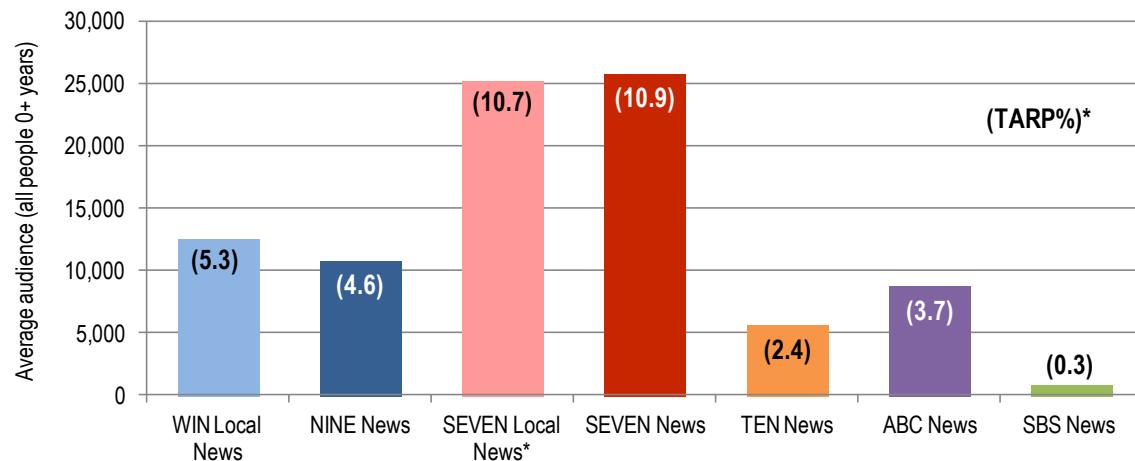


Source: RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.

Cairns universe estimate: 256,003.

*Target Average Rating Point (TARP%) = average audience calculated as a percentage of the Universe Estimate.

Figure 14: Townsville—Average audiences across evening TV news services, weekdays, 2012

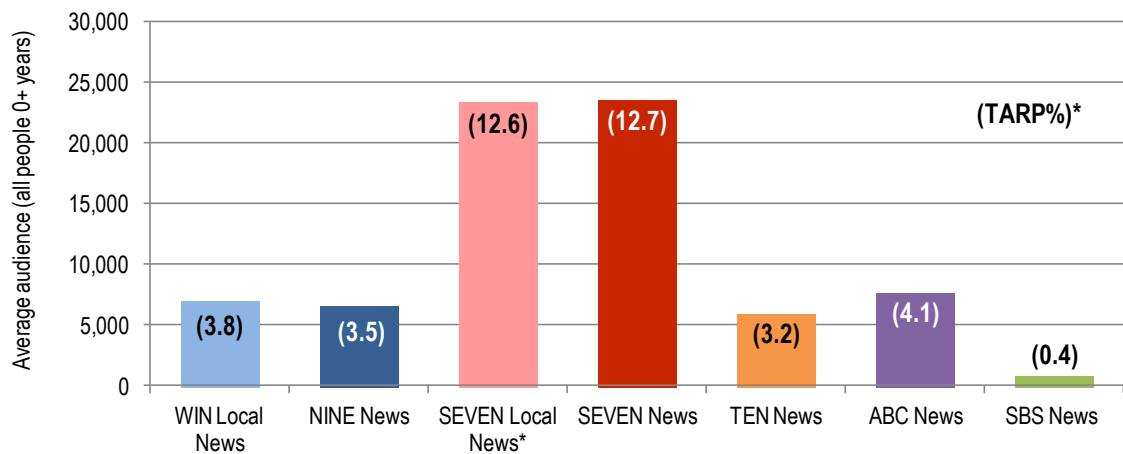


Source: RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.

Townsville universe estimate: 235,006.

* Target Average Rating Point (TARP%) = average audience calculated as a percentage of the Universe Estimate.

Figure 15: Mackay—Average audiences across evening TV news services, weekdays, 2012

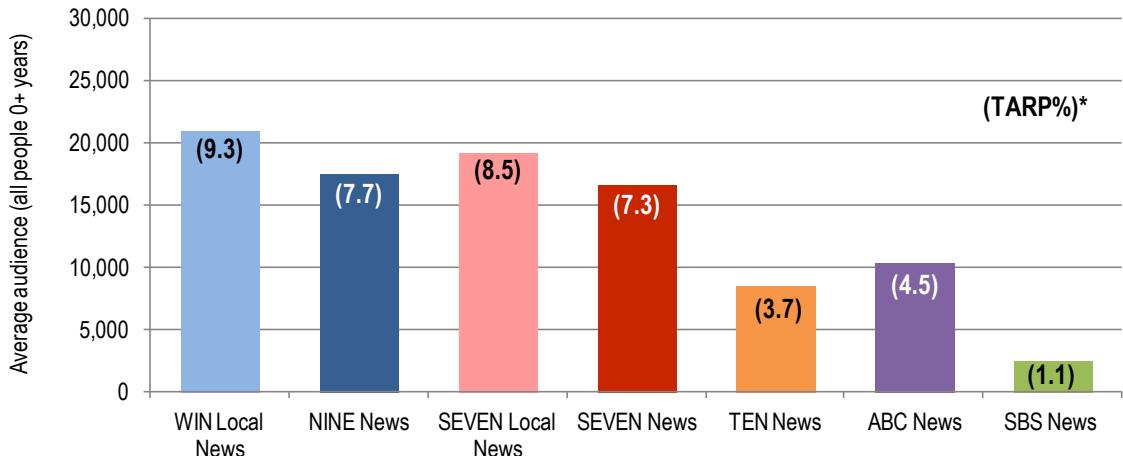


Source: *RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.*

Mackay universe estimate: 186,005.

*Target Average Rating Point (TARP%) = average audience calculated as a percentage of the Universe Estimate.

Figure 16: Rockhampton—Average audiences across evening TV news services, weekdays, 2012

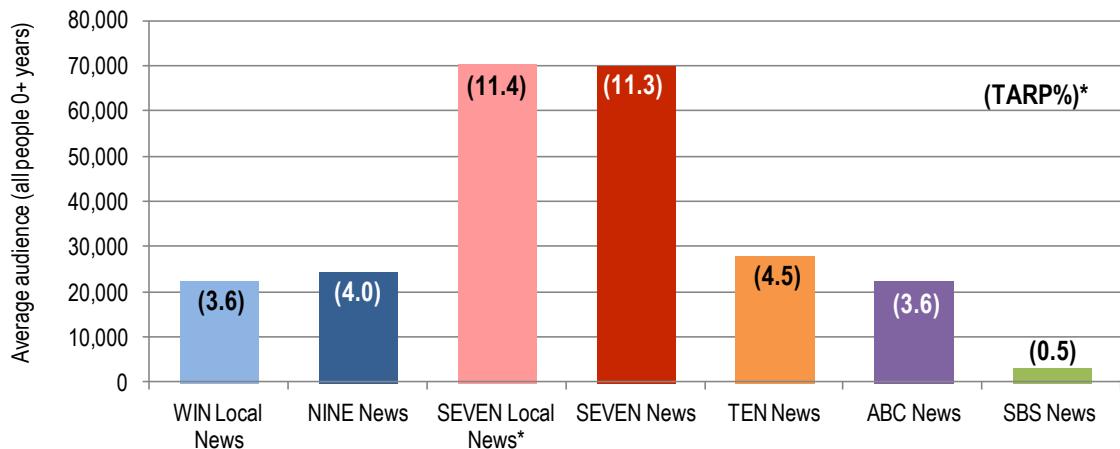


Source: *RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.*

Rockhampton universe estimate: 225,005.

*Target Average Rating Point (TARP%) = average audience calculated as a percentage of the Universe Estimate.

Figure 17: Maryborough—Average audiences across evening TV news services, weekdays, 2012

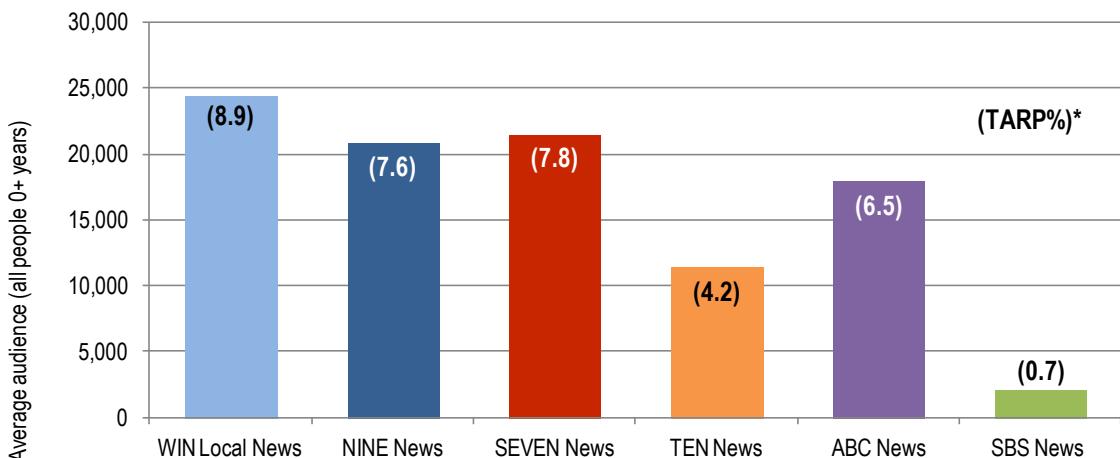


Source: RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.

Maryborough universe estimate: 615,001.

*Target Average Rating Point (TARP%) = average audience calculated as a percentage of the Universe Estimate.

Figure 18: Toowoomba—Average audiences across evening TV news services, weekdays, 2012



Source: RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.

Toowoomba universe estimate: 275,002.

*Target Average Rating Point (TARP%) = average audience calculated as a percentage of the Universe Estimate.

Northern New South Wales

NBN Nine news provides a local news service in each sub-market of Northern New South Wales that includes both local and metropolitan news.⁹ Prime local news is provided in each sub-market except for Newcastle.

Some key observations include:

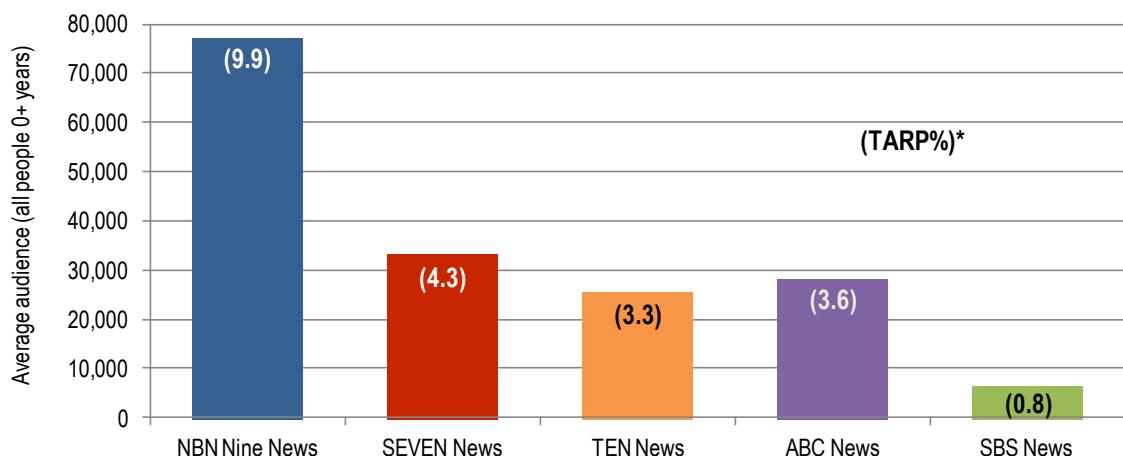
- > While NBN Nine news (comprising both local and national news services) achieved the highest average audience across Northern New South Wales, it had a considerably higher audience in Newcastle (where Prime local news is not available) than the other news services. Seven, ABC and Ten each had similar audience numbers but were only one-third to less than half of NBN Nine's audience.

⁹ Regional TAM data does not separate local from national news audiences.

- > Prime local and Seven national news services had the highest average audience in the Tamworth-Taree area, where Prime local news recorded slightly higher average audience numbers than Seven national news in 2012.
- > Somewhat unusually, when compared to other sub-markets, audiences in the Northern Rivers sub-market were low across all news services when calculated as a percentage of the universe estimate in that area.
- > Also, unlike other sub-markets, ABC news in the Northern Rivers area had the largest average audience at 3.9 per cent of the region's total potential audience.

Audiences in Northern New South Wales are affected by significant metropolitan overlaps in the Northern Rivers (Gold Coast transmitters) and Newcastle (Central Coast transmitters). Their audiences may be lower due to this metropolitan competition.

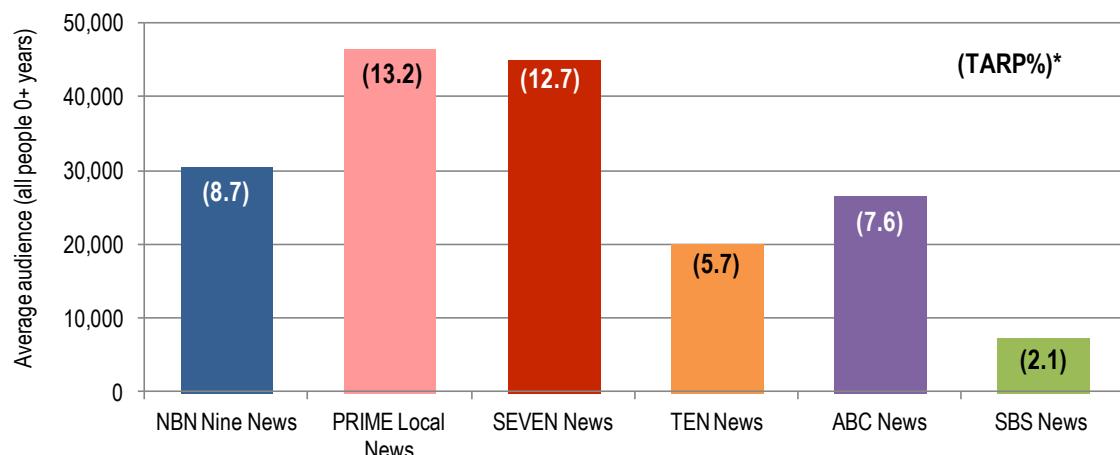
Figure 19: Newcastle—Average audiences across evening TV news services, weekdays, 2012



Source: *RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.*
Newcastle universe estimate: 779,004.

*Target Average Rating Point (TARP%) = average audience calculated as a percentage of the Universe Estimate.

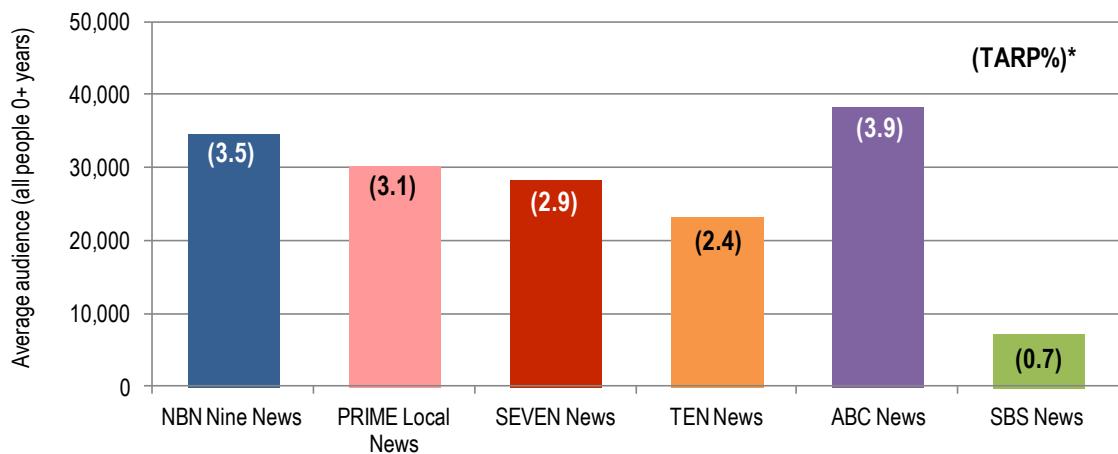
Figure 20: Tamworth Taree—Average audiences across evening TV news services, weekdays, 2012



Source: *RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.*
Tamworth Taree universe estimate: 352,001.

*Target Average Rating Point (TARP%) = average audience calculated as a percentage of the Universe Estimate.

Figure 21: Northern Rivers—Average audiences across evening TV news services, weekdays, 2012



Source: RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.

Northern Rivers universe estimate: 978,003.

*Target Average Rating Point (TARP%) = average audience calculated as a percentage of the Universe Estimate.

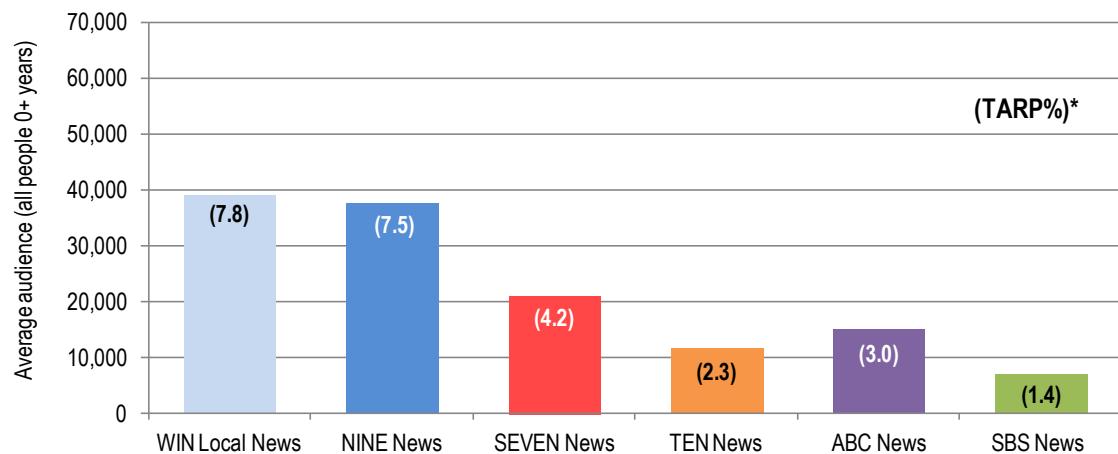
Southern New South Wales

While WIN local news is broadcast in each of the Southern New South Wales sub-markets, Prime local news services are only shown in the Orange-Dubbo-Wagga sub-market.

Some key observations include:

- > In 2012, WIN local and Nine national news services achieved the highest average audiences in two sub-markets (Canberra and Wollongong).
- > Prime local news and Seven news had the largest audiences in the Orange-Dubbo-Wagga sub-market. This is even with WIN's presence in that sub-market.

Figure 22: Canberra—Average audiences across evening TV news services, weekdays, 2012

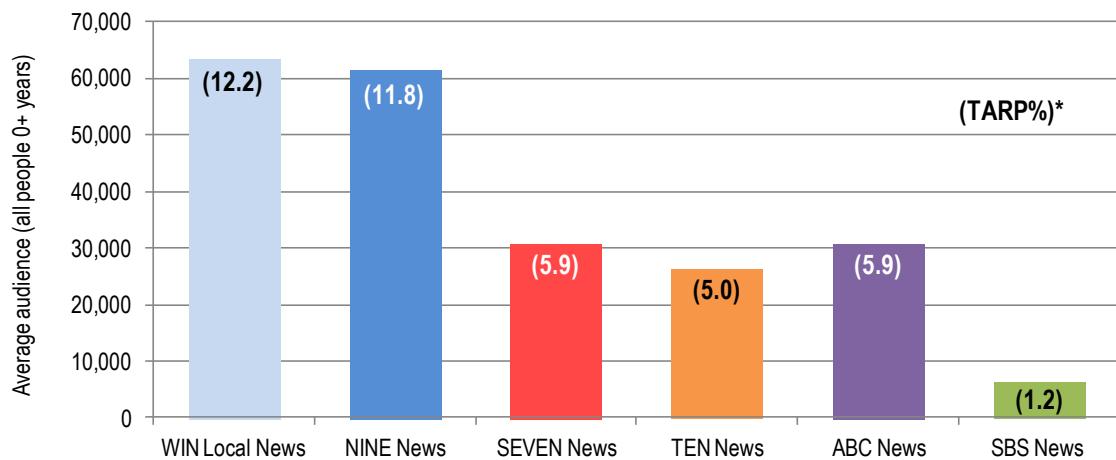


Source: RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.

Canberra universe estimate: 498,013.

*Target Average Rating Point (TARP) = average audience calculated as a percentage of Universe Estimate.

Figure 23: Wollongong—Average audiences across evening TV news services, weekdays, 2012

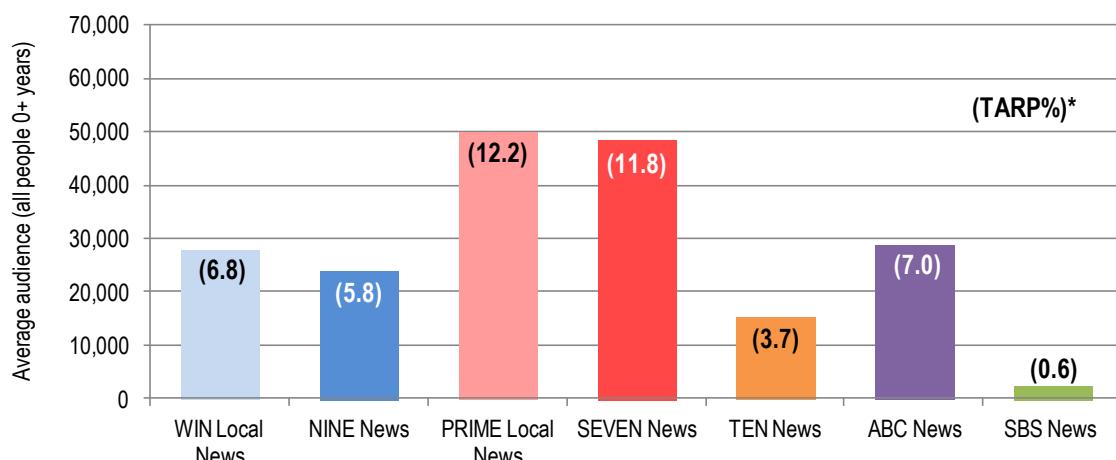


Source: RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.

Wollongong universe estimate: 409,000.

*Target Average Rating Point (TARP) = average audience calculated as a percentage of Universe Estimate.

Figure 24: Orange Dubbo Wagga—Average audiences across evening TV news services, weekdays, 2012



Source: RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.

Orange Dubbo Wagga universe estimate: 522,000.

*Target Average Rating Point (TARP) = average audience calculated as a percentage of Universe Estimate.

Victoria

Both WIN local news and Prime local news are broadcast in Victoria; however Prime local news services are only broadcast in the Albury-Wodonga sub-market on the New South Wales/Victorian border where Seven national news and Prime local news services attracted the highest news audiences.

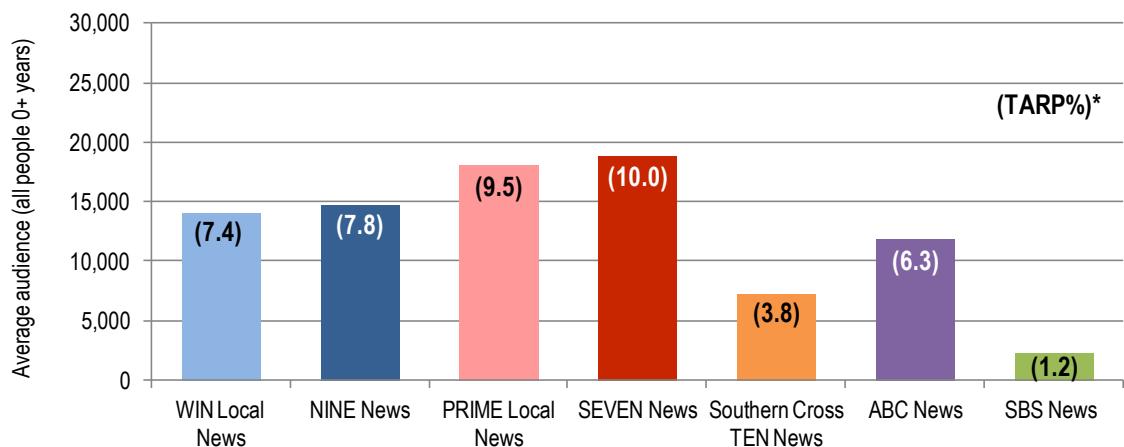
In the other sub-markets, WIN local news and Nine national news were the most popular evening news services.

Figures 25 to 29 also show that:

- > WIN local news achieved the largest average audience numbers in Victoria overall, and particularly in the Gippsland, Shepparton, Bendigo and Ballarat sub-markets where local news audiences were higher than for Nine national news.

- > While fewer people watched Seven news in most Victorian sub-markets, it also attracted relatively substantial audiences compared to other available news services.
- > ABC news also attracted good but lower audiences in Ballarat, Bendigo, Gippsland and Albury Wodonga as a percentage of potential audiences that are relevant to each of these sub-markets. Shepparton had the lowest ABC audience in Victoria.

Figure 25: Albury Wodonga—Average audiences across evening TV news services, weekdays, 2012

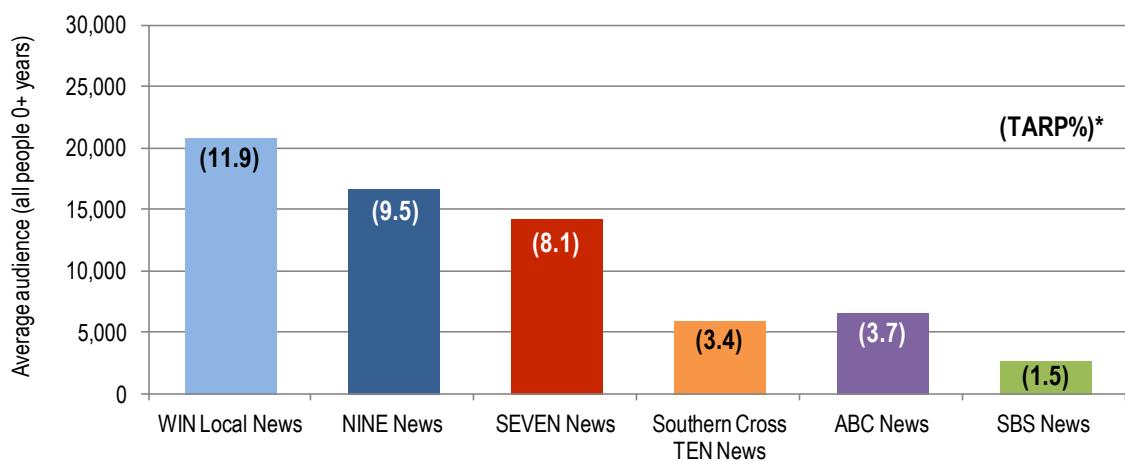


Source: *RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.*

Albury Wodonga universe estimate: 189,000.

*Target Average Rating Point (TARP) = average audience calculated as a percentage of the Universe Estimate.

Figure 26: Shepparton—Average audiences across evening TV news services, weekdays, 2012

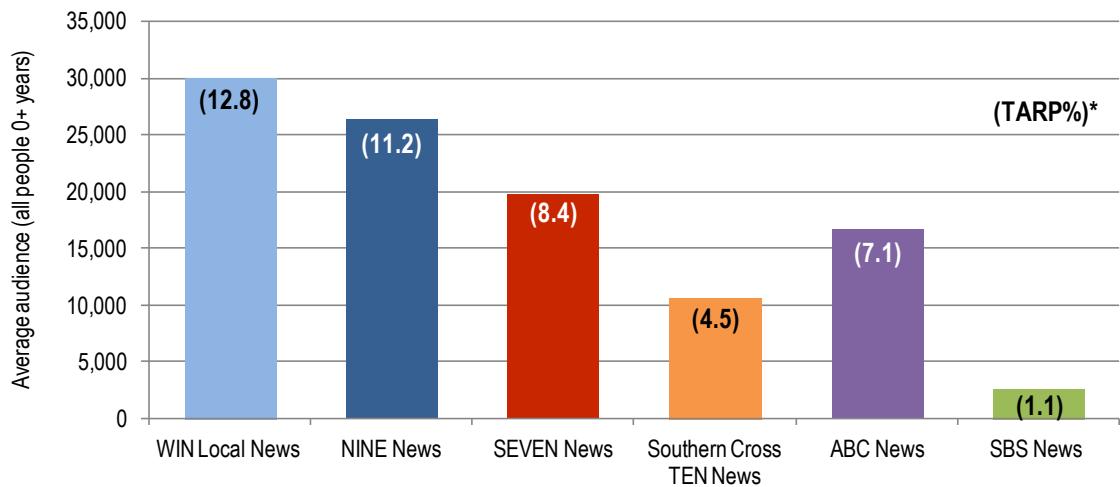


Source: *RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.*

Shepparton universe estimate: 175,000.

*Target Average Rating Point (TARP) = average audience calculated as a percentage of the Universe Estimate.

Figure 27: Bendigo—Average audiences across evening TV news services, weekdays, 2012

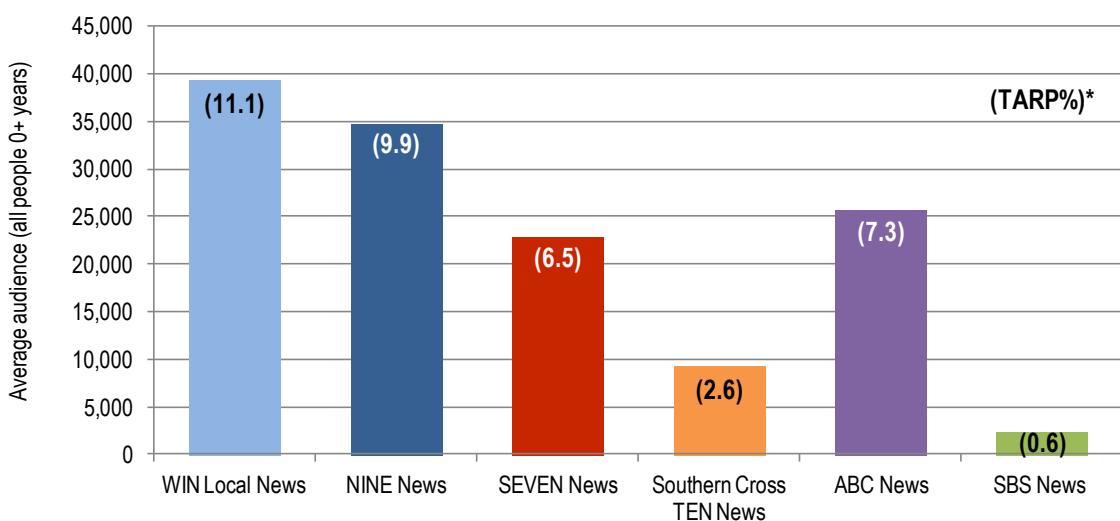


Source: RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.

Bendigo universe estimate: 235,000.

*Target Average Rating Point (TARP) = average audience calculated as a percentage of the Universe Estimate.

Figure 28: Ballarat—Average audiences across evening TV news services, weekdays, 2012

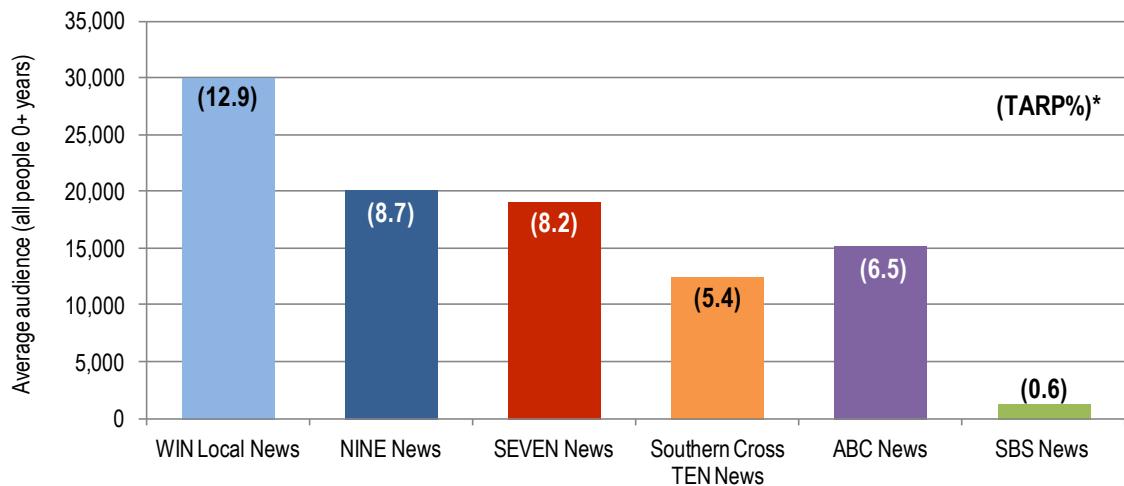


Source: RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.

Ballarat universe estimate: 352,000.

*Target Average Rating Point (TARP) = average audience calculated as a percentage of the Universe Estimate.

Figure 29: Gippsland—Average audiences across evening TV news services, weekdays, 2012



Source: *RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.*

Gippsland universe estimate: 232,004.

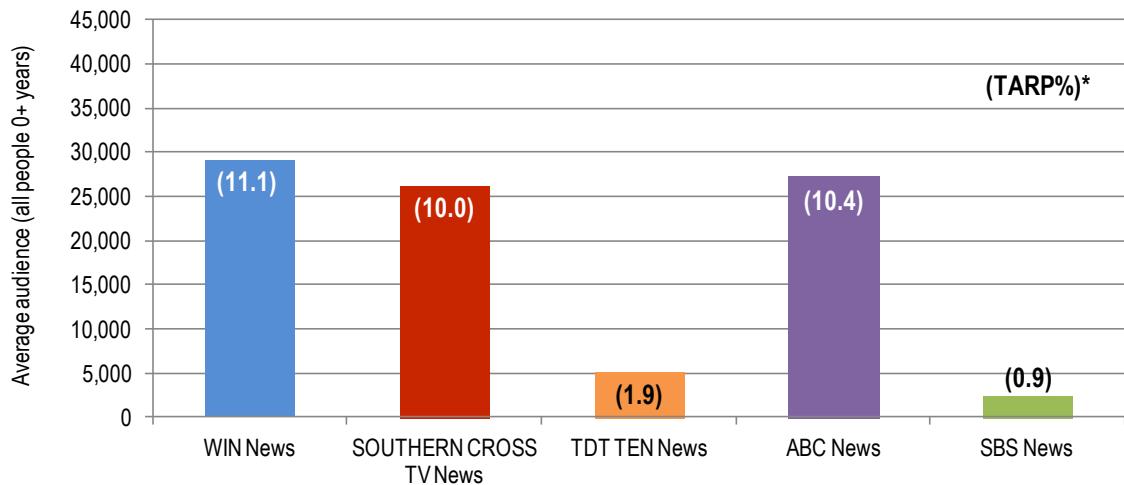
*Target Average Rating Point (TARP) = average audience calculated as a percentage of the Universe Estimate.

Tasmania

The two sub-markets in Tasmania, Hobart and Launceston, show different characteristics in evening television news viewing. The differences are outlined below:

- > The top three evening news services in Hobart attract similar average audience numbers to each other. In order from the most popular were WIN news (half hour coverage of both local and national news), ABC news and Southern Cross TV news (half hour coverage of both local and national news).
- > In Launceston there is a clear hierarchy of news services that viewers watch. SOUTHERN CROSS TV news was substantially more popular in terms of average audience and the relatively high proportion of viewers in its sub-market (16.4 per cent of the potential audience). ABC news was the next most popular (at 9.9 per cent), followed by WIN news (5.6 per cent).
- > TDT Ten news (operated by WIN and Southern Cross as a joint venture) and SBS news had very small average audiences in 2012 compared to the other three services.

Figure 30: Hobart—Average audiences across evening TV news services, weekdays, 2012

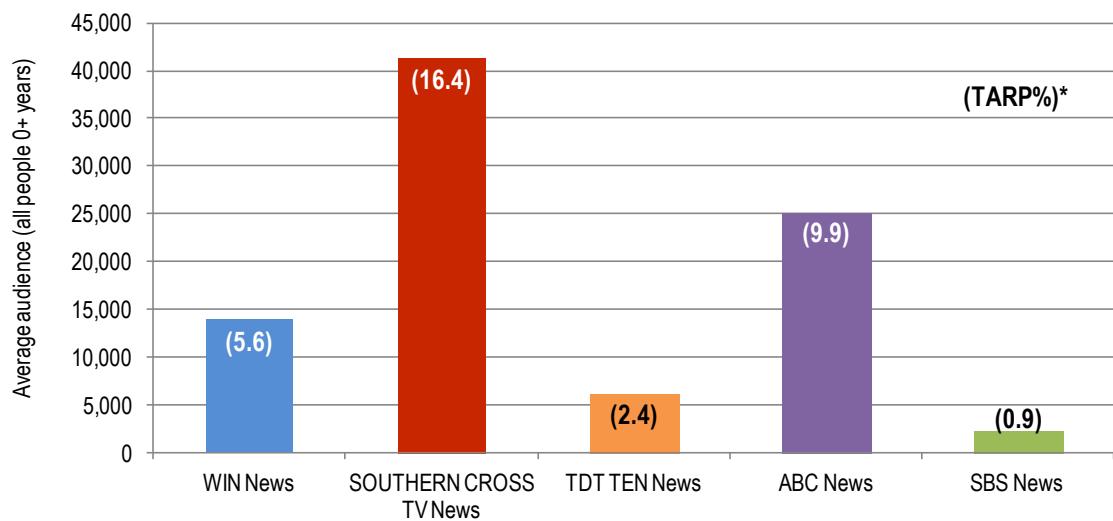


Source: RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.

Hobart universe estimate: 263,010.

*Target Average Rating Point (TARP) = average audience calculated as a percentage of the Universe Estimate.
TEN News includes weekday and weekend news services.

Figure 31: Launceston—Average audiences across evening TV news services, weekdays, 2012



Source: RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.

Launceston universe estimate: 252,007.

*Target Average Rating Point (TARP) = average audience calculated as a percentage of the Universe Estimate.
TEN News includes weekday and weekend news services.

Western Australia

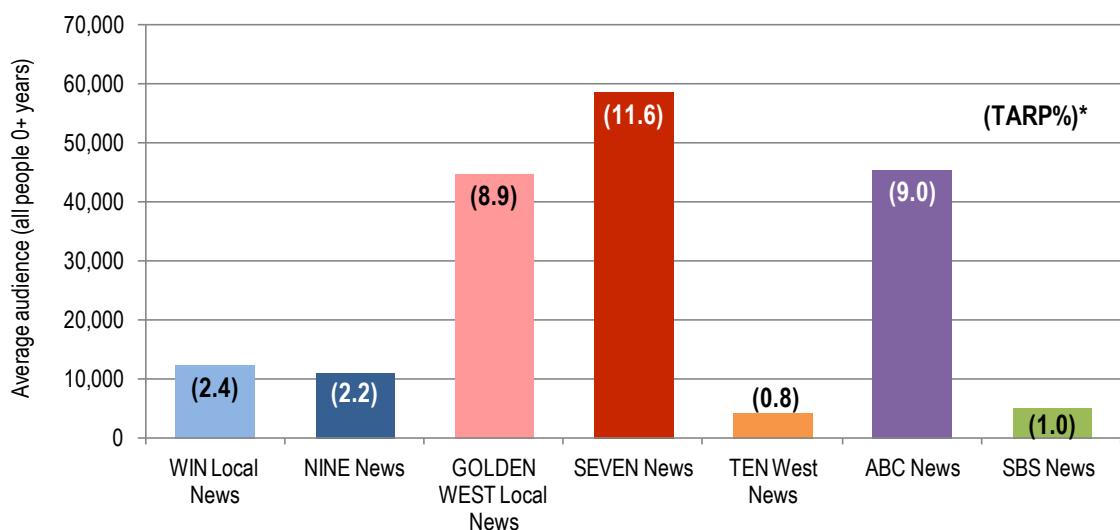
Regional Western Australia covers the entire state except for Perth metropolitan area and Mandurah.

WIN and GOLDEN WEST local news services are broadcast in Regional Western Australia.

The following observations can be made in this market (see Figure 32):

- > Seven national news achieved the highest average audience of 58,503 in 2012.
- > ABC news and GOLD WEST local news services were less popular than Seven national news but still achieved relatively high average audience numbers. ABC news rated well in regional Western Australia and attracted an audience similar in size to GOLDEN WEST local news.
- > Audience numbers for WIN local (this news service stopped being provided in early 2013) and Nine national news were relatively low, while Ten West (which is a joint venture between GWN and WIN) and SBS news audiences were very small compared with other news services in regional Western Australia.

Figure 32: Western Australia—Average audiences across evening TV news services, weekdays, 2012



Source: RegionalTAM data, Average audience across weekday evening news services, 2012, Consolidated.

Regional Western Australia universe estimate: 505,010.

*Target Average Rating Point (TARP) = average audience calculated as a percentage of the Universe Estimate.

Appendix A—Number of local news services in regional sub-markets

Regional market/sub-market	One local news service	Two local news services
Regional Queensland		
Cairns		✓
Townsville		✓
Mackay		✓
Rockhampton		✓
Maryborough		✓
Toowoomba	✓	
Northern New South Wales		
Newcastle	✓	
Tamworth Taree		✓
Northern Rivers		✓
Southern New South Wales		
Canberra	✓	
Wollongong	✓	
Orange Dubbo Wagga		✓
Regional Victoria		
Albury Wodonga		✓
Shepparton	✓	
Bendigo	✓	
Ballarat	✓	
Gippsland	✓	
Tasmania		
Hobart		✓
Launceston		✓
Regional Western Australia		
TOTAL number	9	11

Appendix B—Regional free-to-air television multi-channel launch and breakout dates

Channel	Broadcast Launch	Channel Breakout
TDT (SD)	1st January 2004 (Hobart) August 2004 (Launceston)	30th November 2008
ABC2 (SD)	7th March 2005 June 2008 (RegVA)	1st June 2008
ONE (HD)	2nd July 2009 (ex Tasmania) 30th July 2009 (Tasmania)	27th December 2009
SBS TWO (SD)	1st June 2009 August 2011 (RegVA)	12th Feb 2012 (RegVA)
GO! (SD)	9th August 2009 August 2011 (RegVA)	28th June 2009
7TWO (SD)	1st November 2009 (QLD) 23rd December 2009 (Tasmania) (NSW, NSW, & VIC)	29th November 2009 (ex NSW) 27th December 2009 (NSW) 12th Feb 2012 (RegVA)
ABC3 (SD)	4th December 2009 November 2009 (RegVA)	27th December 2009
ABC News 24 (HD)	22nd July 2010 August 2010 (RegVA)	27th December 2009
7mate (HD)	24th October 2010 (Tasmania) August 2011 (RegVA)	1st August 2010
GEM (HD)	26th September 2010 August 2011 (RegVA)	26th September 2010
ELEVEN (SD)	11th January 2011 August 2011 (RegVA)	12th Feb 2012 (RegVA)
Ten West (SD)	June 2010 (RegVA) Progressive launch commencing from Greater Bunbury Area	12th Feb 2012 (RegVA)
NITV (HD)	12th December 2012	9th December 2012



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Canberra

Red Building
Benjamin Offices
Chan Street
Belconnen ACT

PO Box 78
Belconnen ACT 2616

T +61 2 6219 5555
F +61 2 6219 5353

Melbourne

Level 32
Melbourne Central Tower
360 Elizabeth Street
Melbourne VIC

PO Box 13112
Law Courts
Melbourne VIC 8010

T +61 3 9963 6800
F +61 3 9963 6899

Sydney

Level 5
The Bay Centre
65 Pirrama Road
Pyrmont NSW

PO Box Q500
Queen Victoria Building
NSW 1230

T +61 2 9334 7700
1800 226 667
F +61 2 9334 7799