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Emerging Media Trends:

Navigating the Consumer Landscape

Simone Bryant
Media Director
Roy Morgan Research

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Consumers have more options to receive content than previously existed…..

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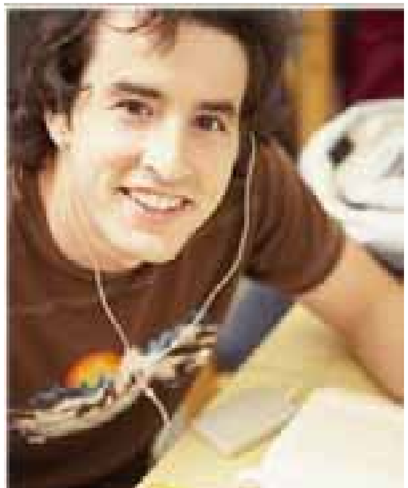


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to iPod Video
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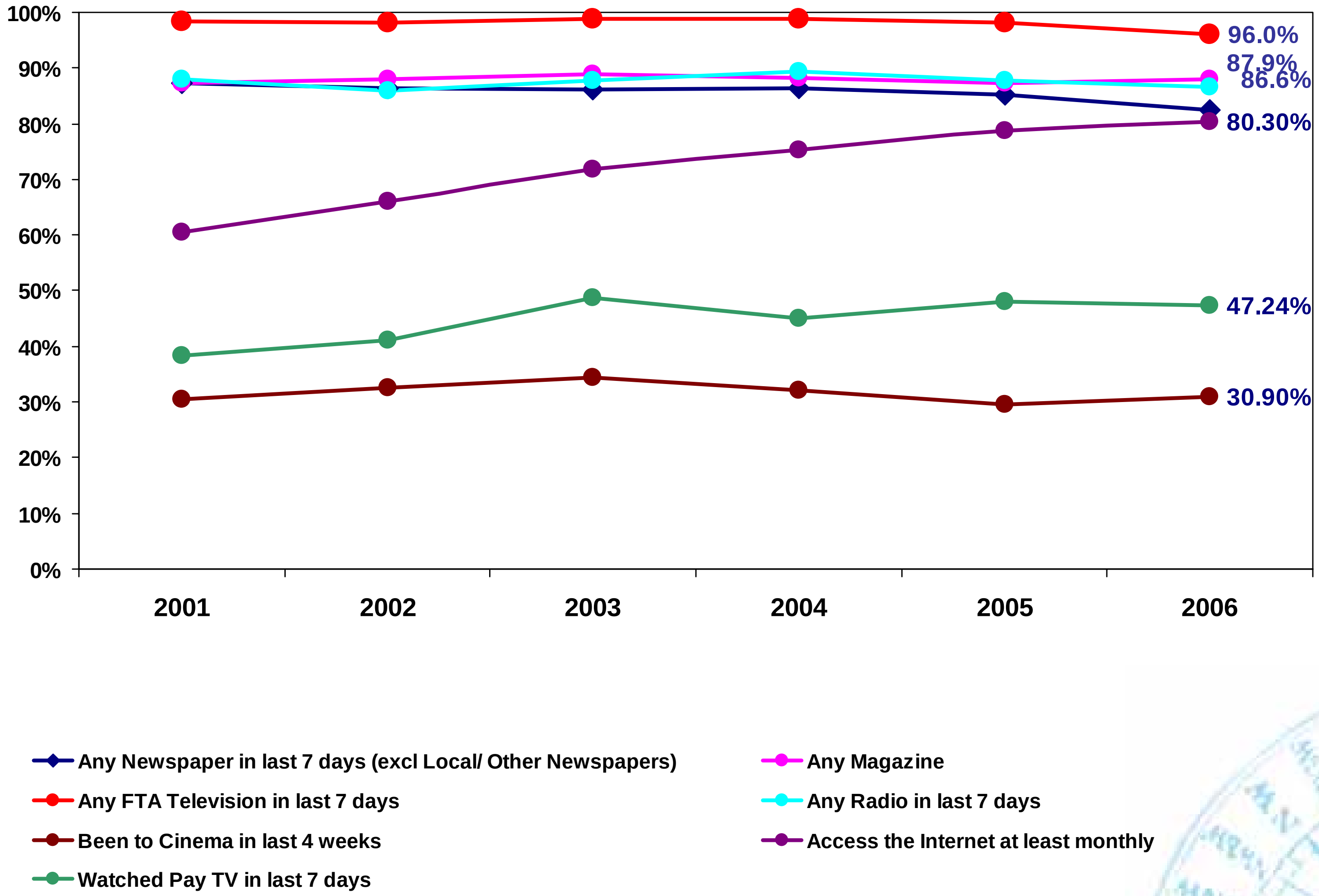
Media consumption – New Zealand 2001 - 2006

All People 14+



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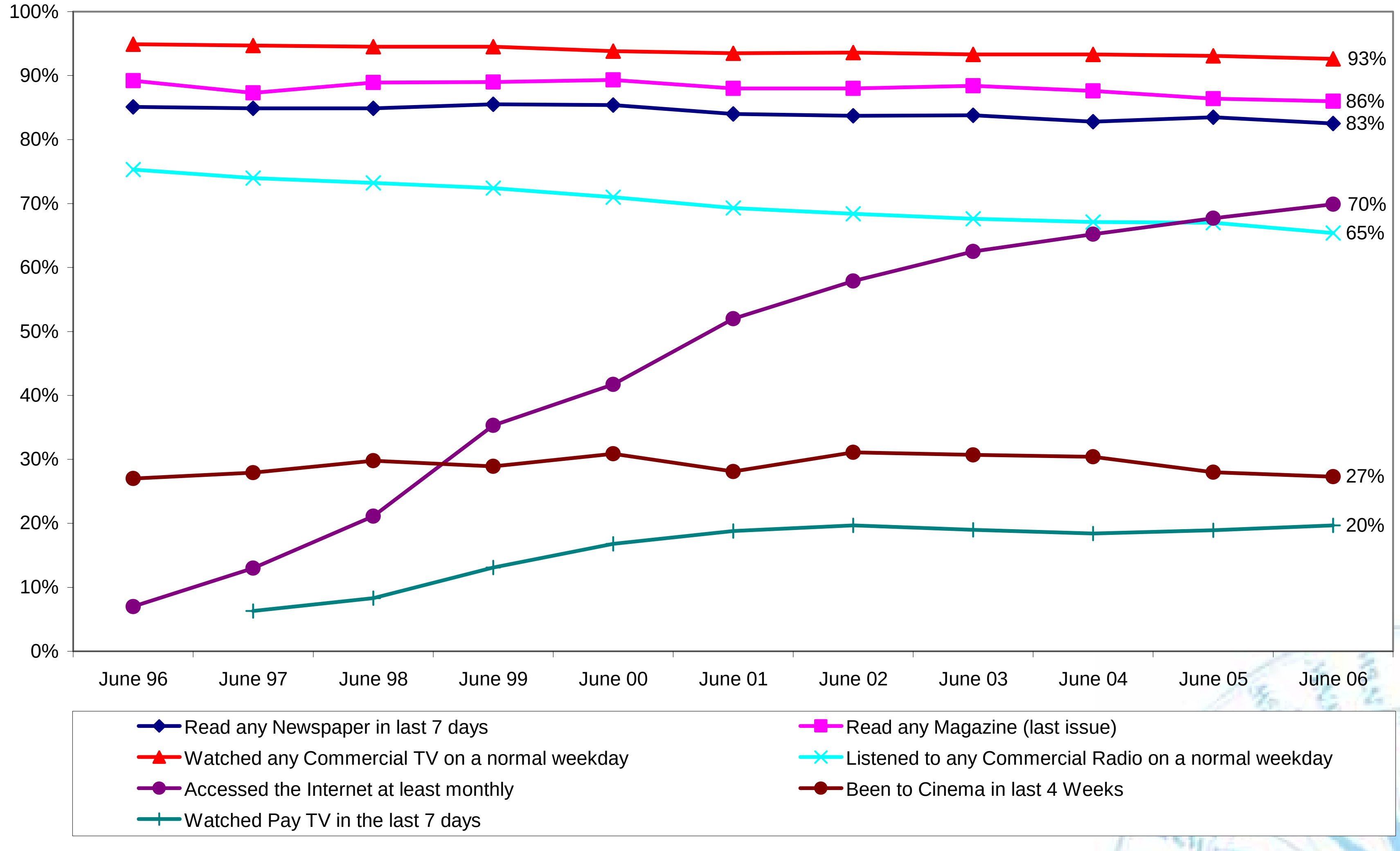
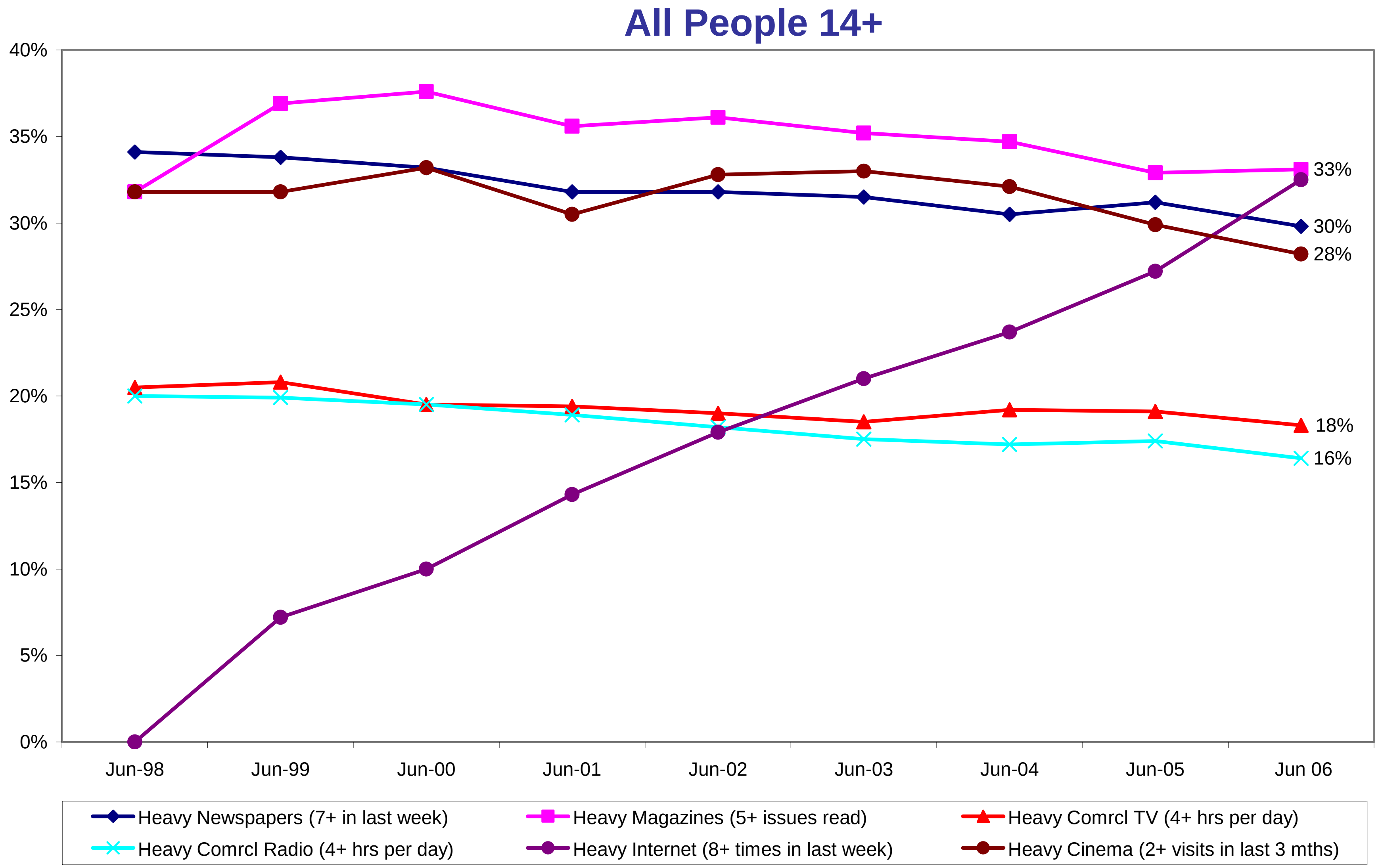
Media consumption – Australia 1996 - 2006

All People 14+

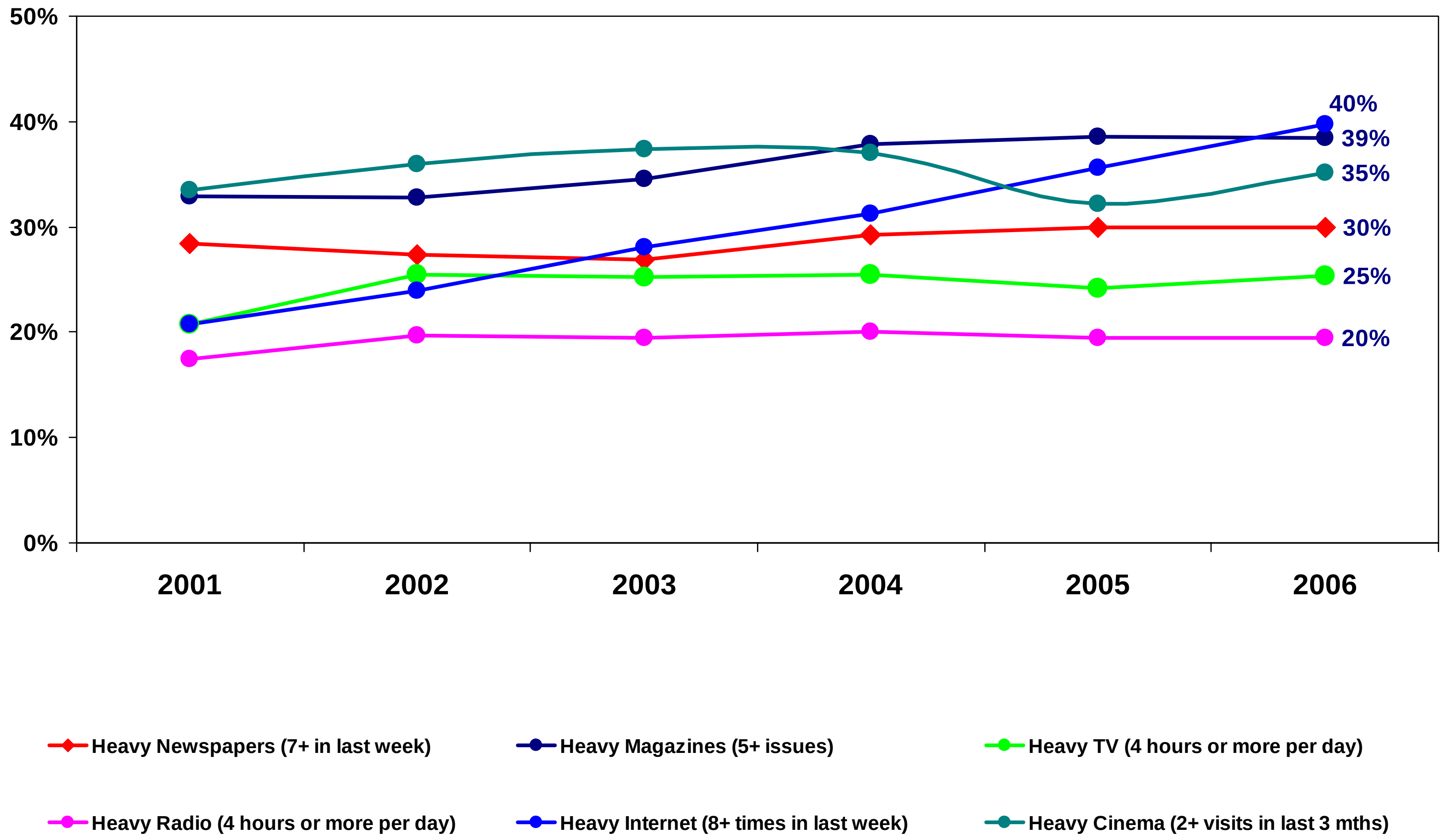


Media Consumption – Australia Heavy Users 1998-2006



Media Consumption – New Zealand Heavy Users 2001-2006

All People 14+



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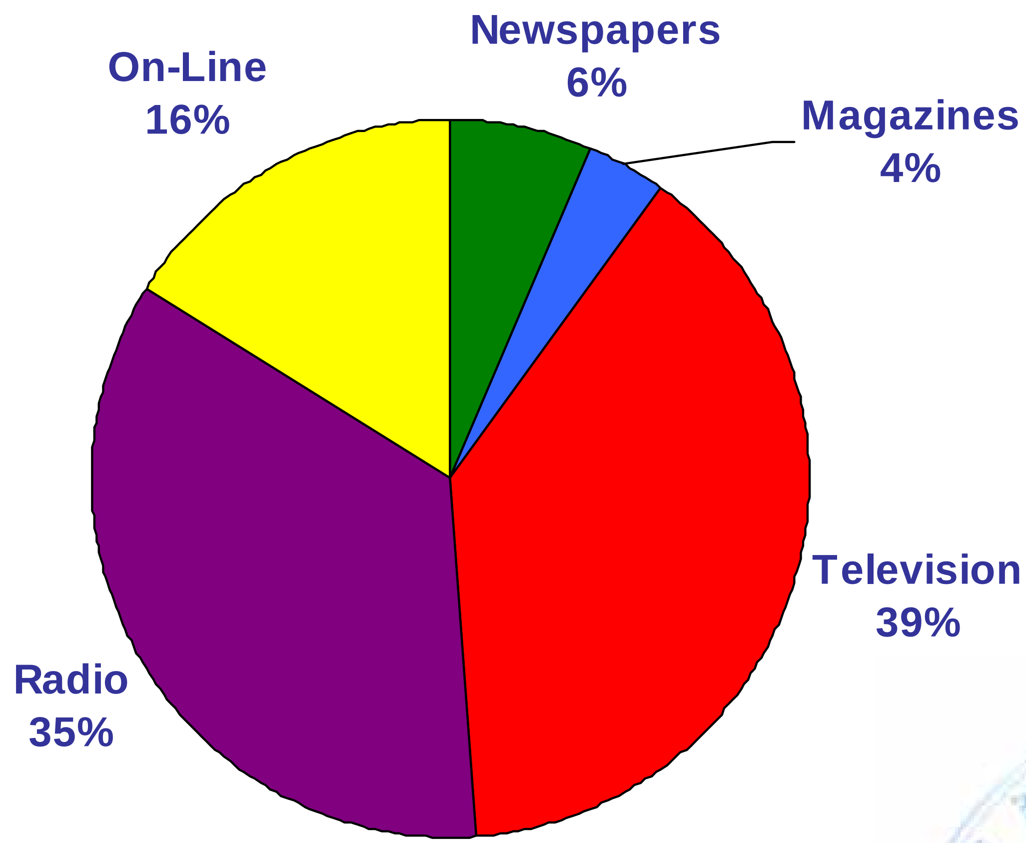
Time spent with media
% of media hours in average week



Source: Roy Morgan Research-New Zealand, October 2006

Time spent with media Under 40's vs 40+

(Hours per week)

	<40 yrs	40+ yrs
Television	19h 50m	21h 52m
Radio	16h 53m	20h 43m
Newspapers	2h 14m	4h 22m
Magazines	1h 38m	2h 17m
Internet	10h 30m	7h 8m
TOTAL	51h 05m	56h 22m

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Source: Roy Morgan Single Source-New Zealand, October 2006

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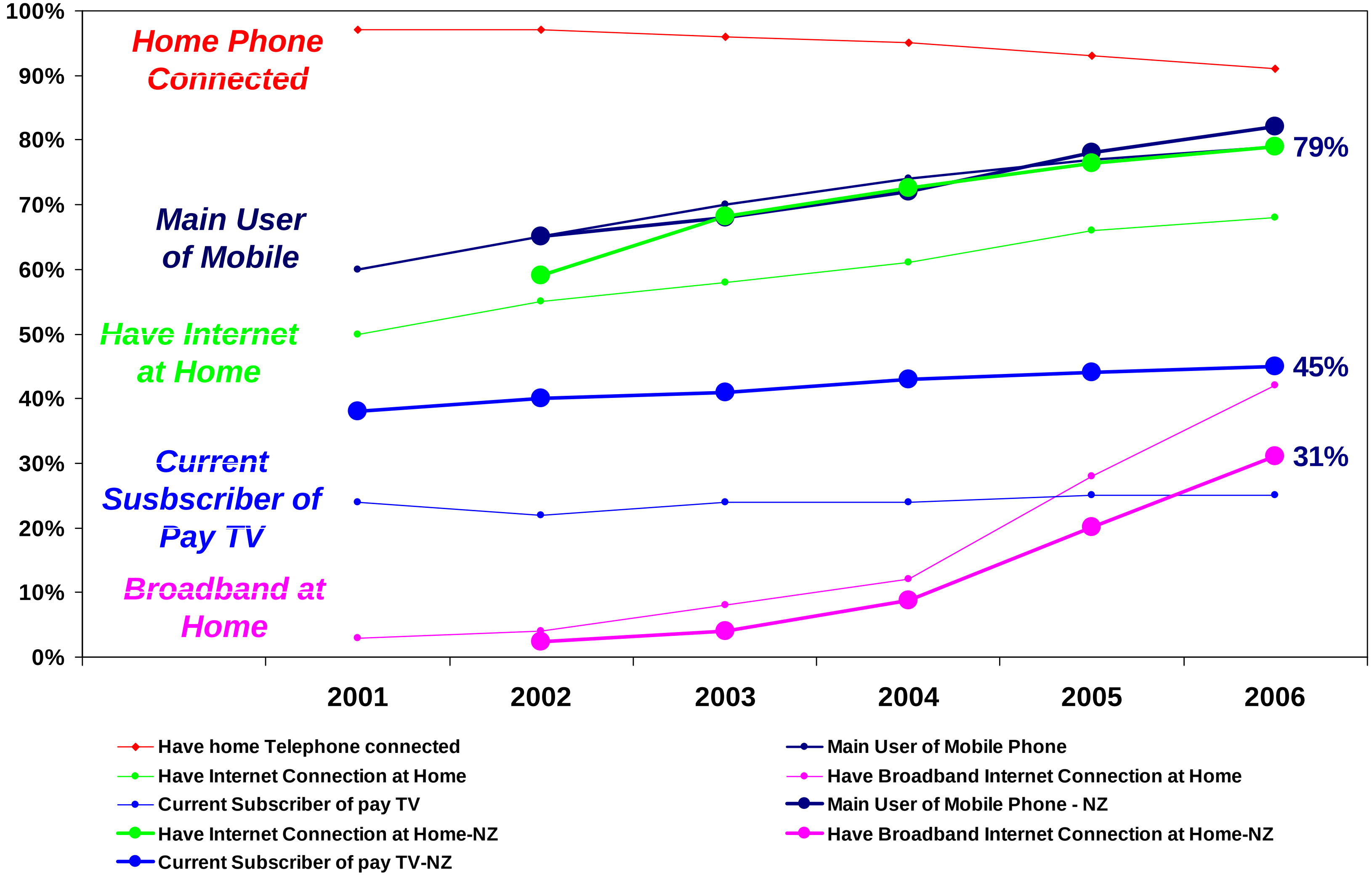
Technology Adoption Trend New Zealand vs Australia 2001-2006

All People 14+



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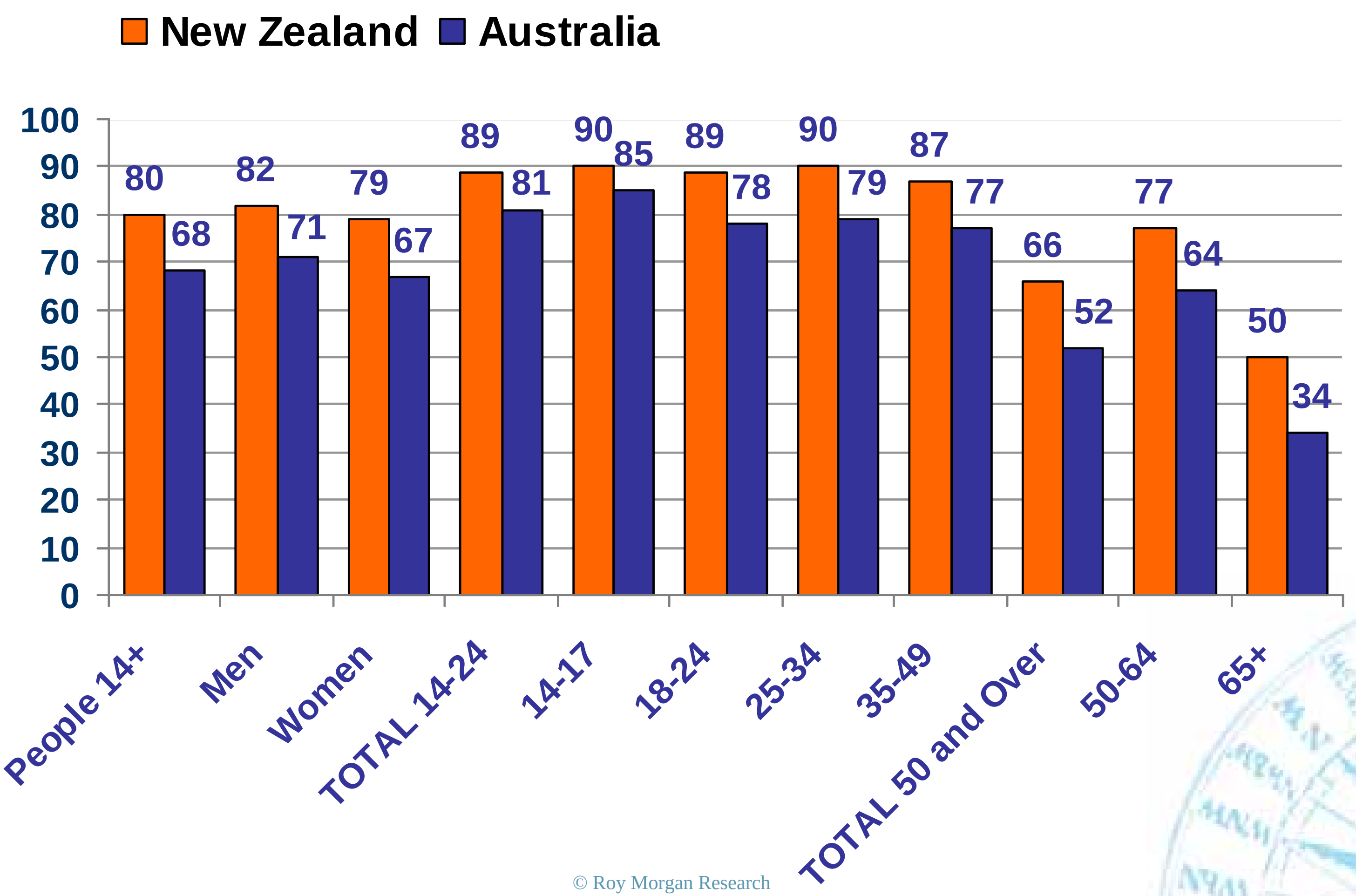
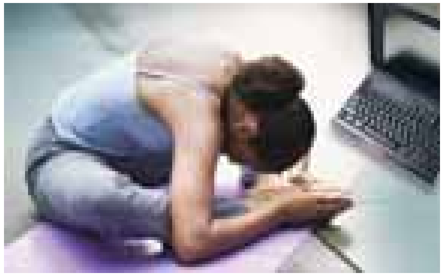
7 years into the .net culture who is online…..

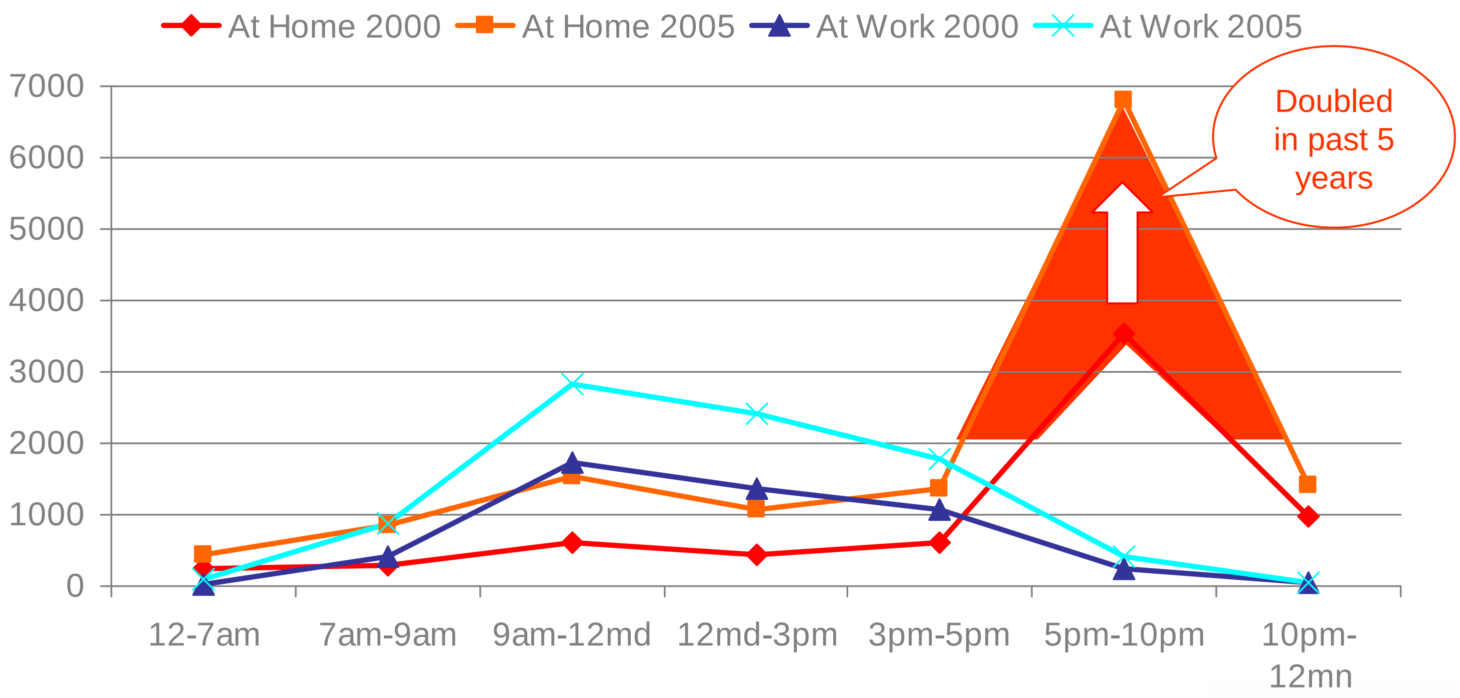
Accessed the Internet at least monthly



Source: Roy Morgan Single Source New Zealand – NZDec06

Access the Internet
2000 vs 2005





Source: Roy Morgan Single Source-Australia

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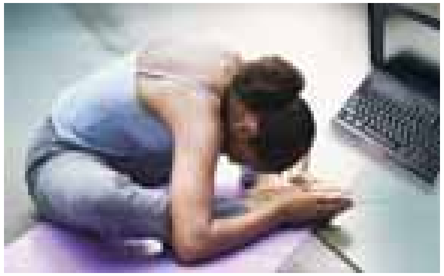
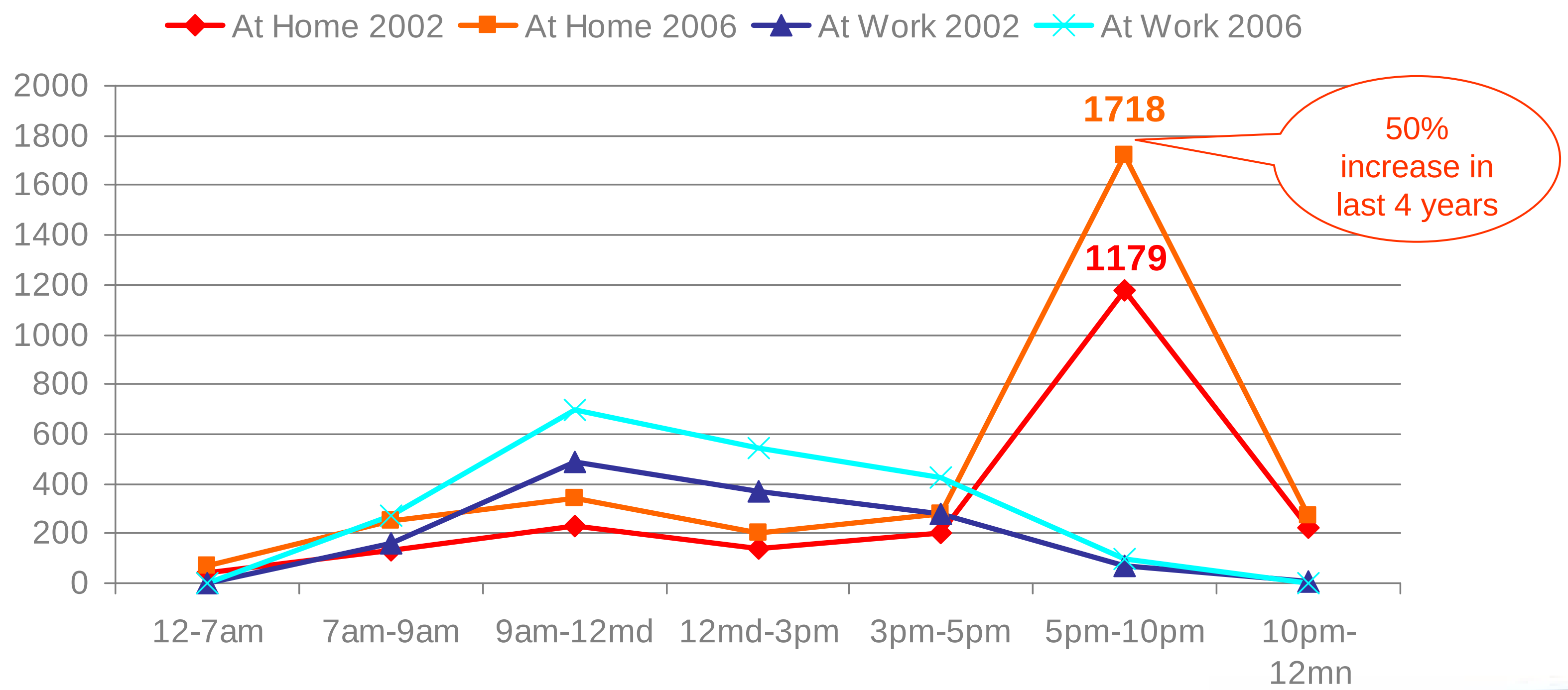
Access the Internet 2002 vs 2006





Source: Roy Morgan Single Source New Zealand – NZDec06

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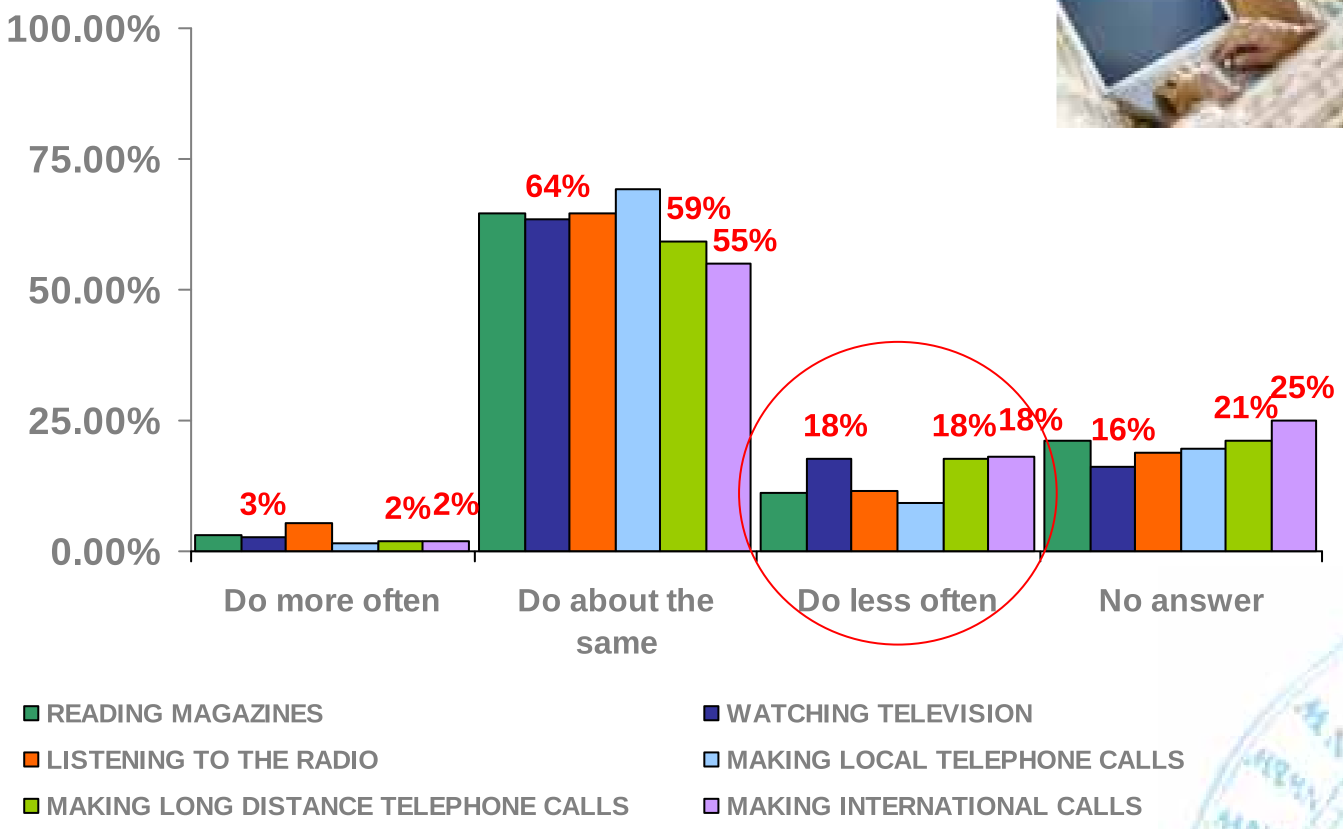
Internet Home Users – How your media habits have changed…..



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Source: Roy Morgan Single Source New Zealand – NZDec06

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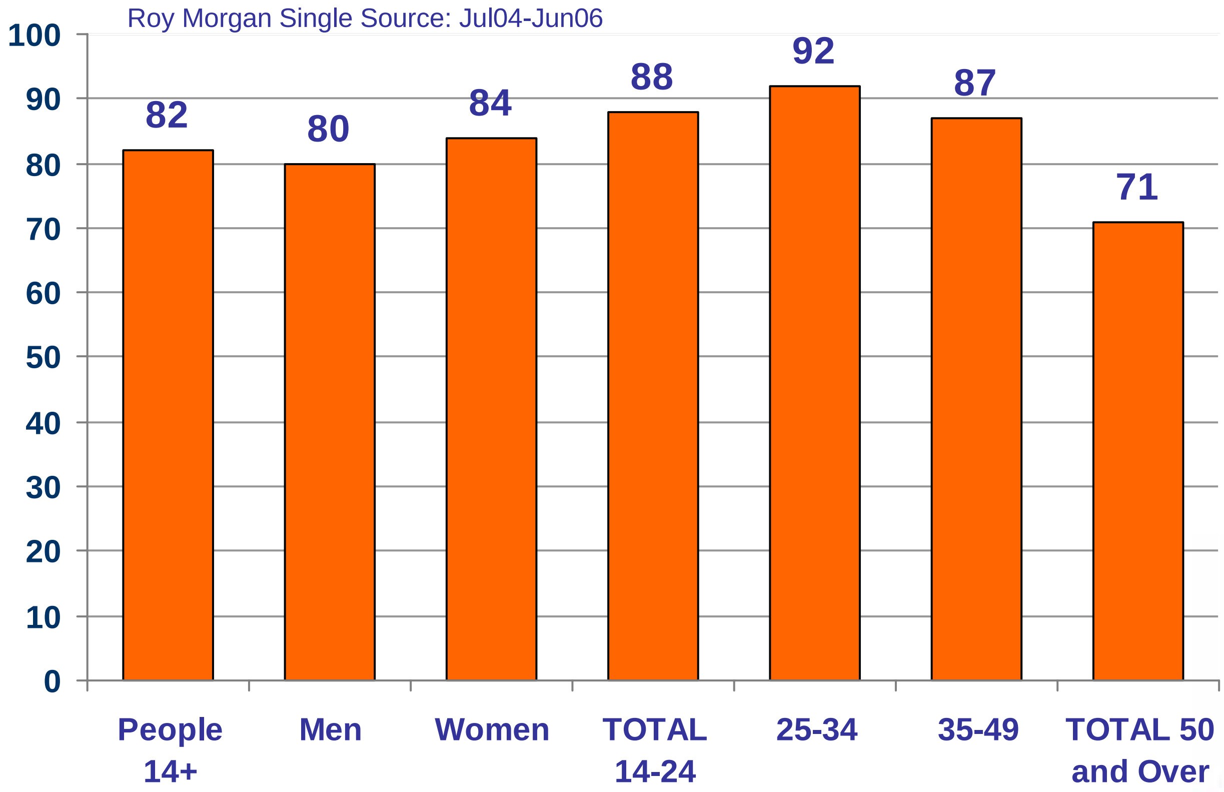
The Mobile Phone

The emergence from substitute utility to interactive accessory



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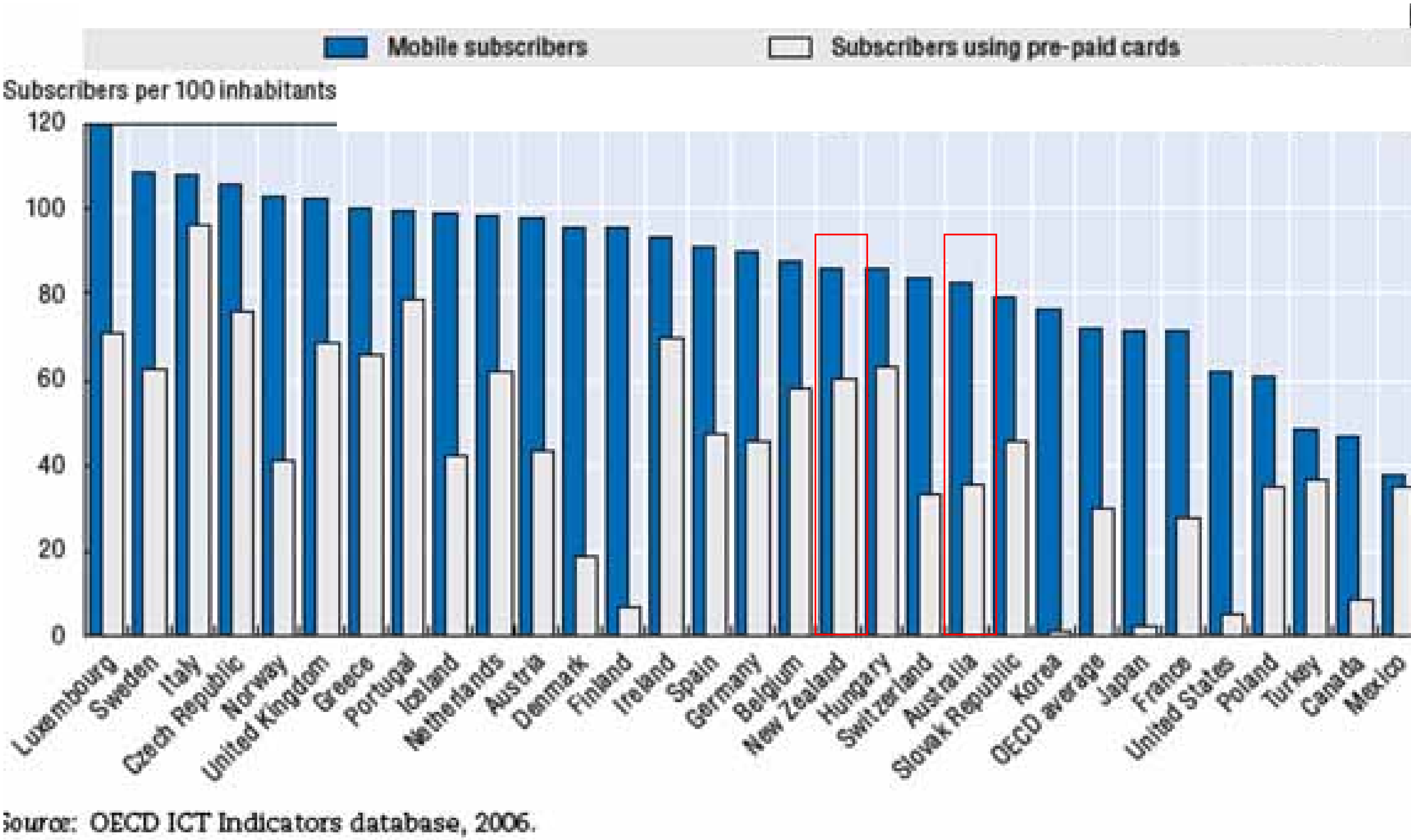
Source: Roy Morgan Single Source New Zealand – NZDec06

Mobile Subscribers and Pre-paid card users



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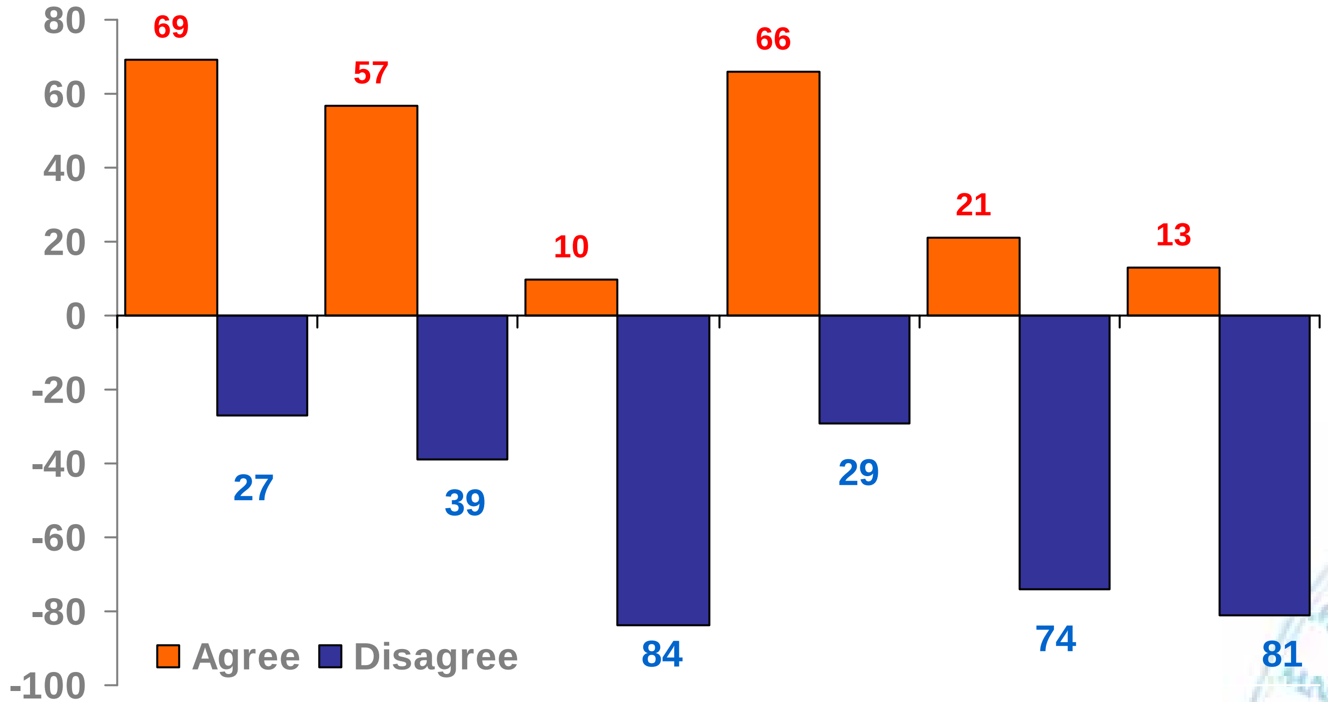
Main Users Mobile Phone – Attitudes…..

- I love being able to contact my friends wherever I am
- I need a mobile phone for my personal security
- If I didn't have to carry a mobile phone for work, I wouldn't have one at all
- I want members of my family to carry a mobile for security
- I need a mobile phone to give me more control over my life
- I would consider replacing my home phone with my mobile



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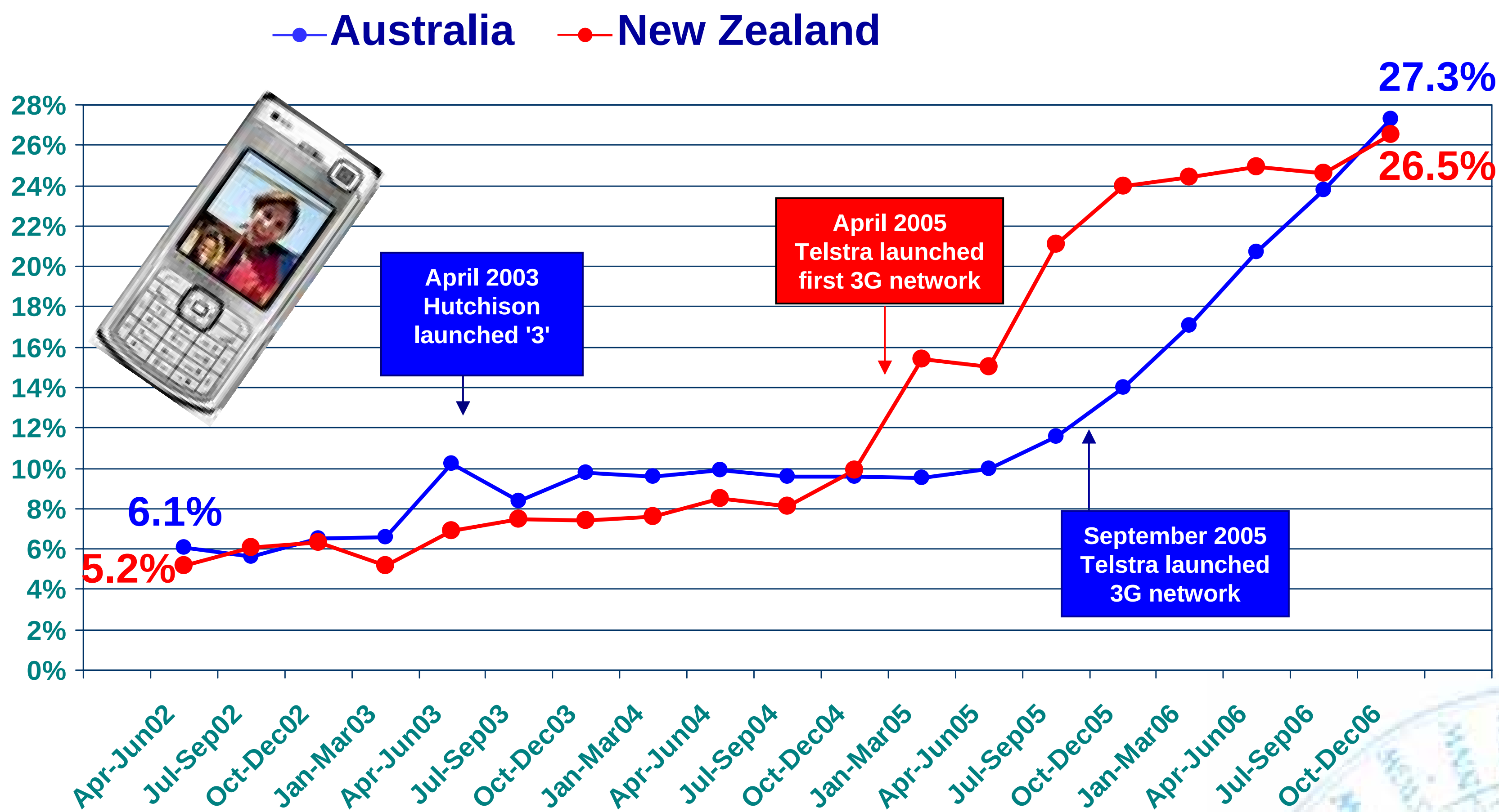
Source: Roy Morgan Single Source New Zealand – NZDec06

I would seriously consider buying a 3G phone



Roy Morgan Single Source: Jun02-Jun06-All People 14+

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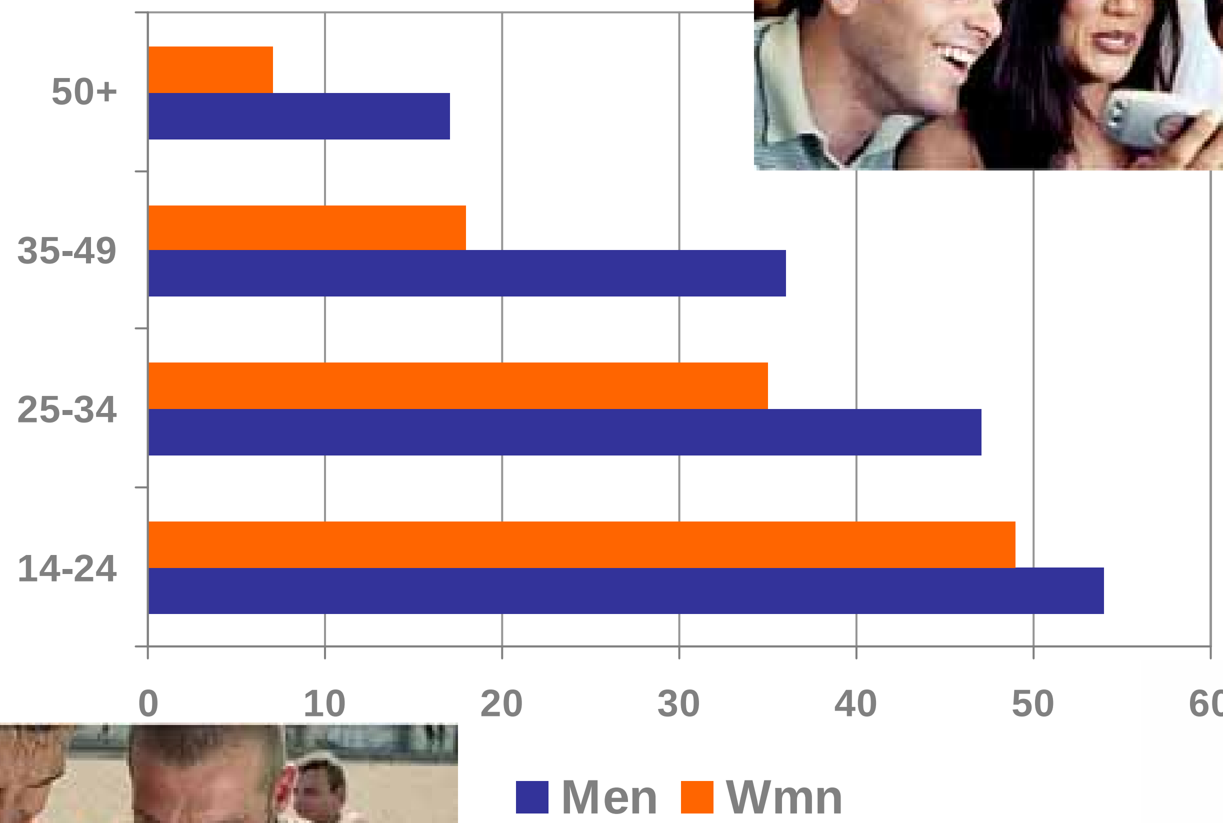
I would seriously consider buying a 3G phone….



Source: Roy Morgan Single Source New Zealand – NZDec06

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Mobile Viewing

- Korea and Japan are leading markets in MTV with "One Seg" launching it's service in April 2006 to the 90million mobile phone users. Deployment has begun in the US, UK and Europe with Italy taking the lead.
- In the US Mobile TV Audience increased by 45% to 3.7 million by Q4, 2006 (Source:- Telephia)
- China is undertaking a trial service in mid-2007 so that the Olympic Games can be broadcast to millions of mobile users across the country. China has more than 400 million mobile phone users.

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IPTV

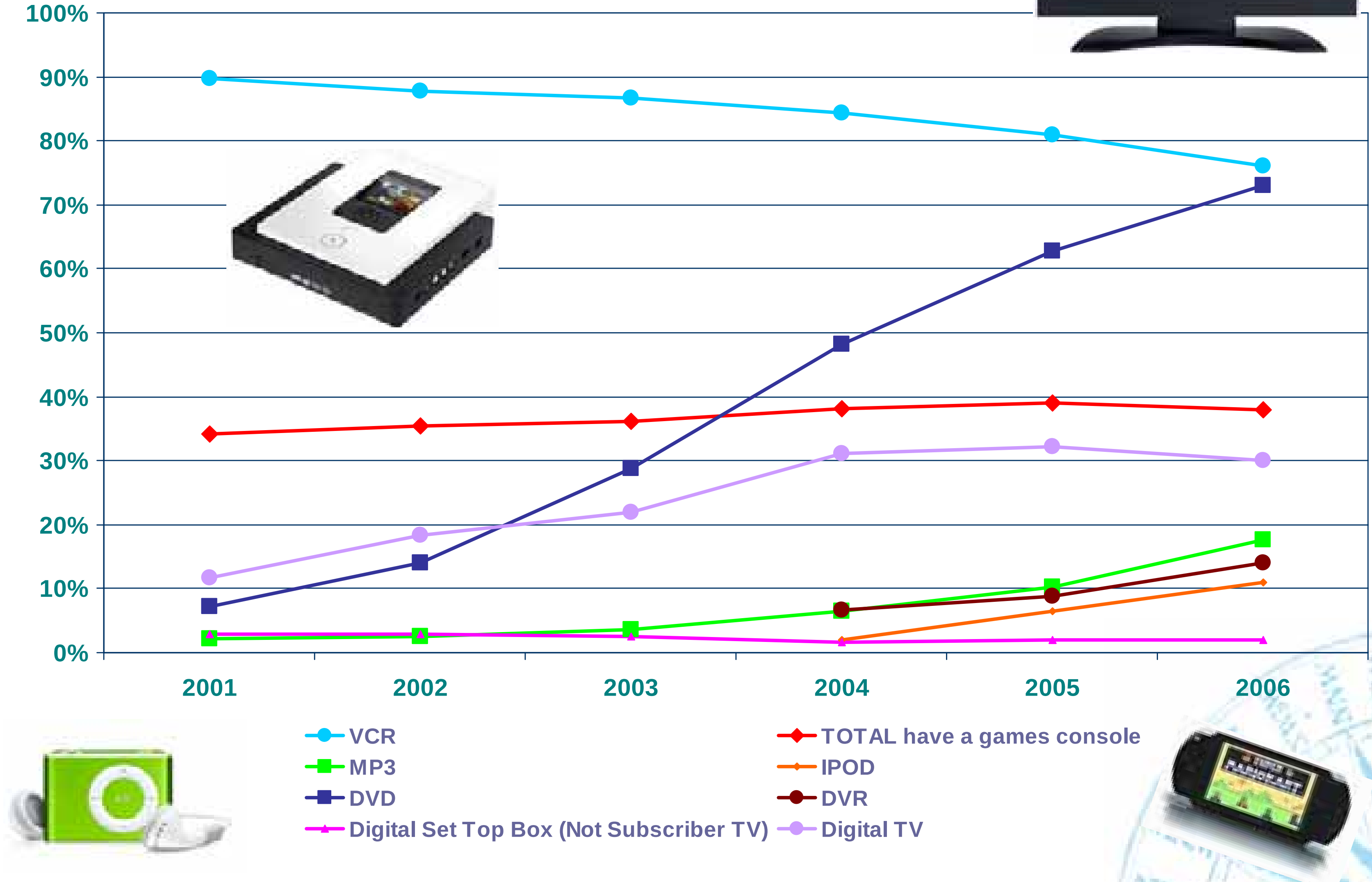
- IPTV is expected to have massive growth over the next few years with 100 million current broadband subscribers worldwide. The latest IPTV research reports that IPTV subscribers hit 3.6million with Western Europe leading the way and accounting for 2.4 million of those and generating a total annualised revenue of almost 1 billion euro.

- Telco's quest to pull themselves out of the commodity voice business. IPTV is the technology that will revolutionise the industry by reducing churn and introduce further revenue streams

- Asia Pacific is predicted to have high growth toward the end of 2007. Hong Kong is already a mature IPTV market, and growth will come from emerging markets such as China and India, following large investments into IPTV deployments there. Australia is also finally moving into the commercial phase of its IPTV offerings, which will lead to fast roll-outs of services in 2007.

- North America will be another major growth area, with SBC communication recently announced a 10 year, $400 million deal to use Microsofts IP television Platform.

Household Entertainment Technology Adoption Rates



Source: Roy Morgan Single Source New Zealand – NZDec06

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"Let's put this in context: every advance in technology was meant to kill off earlier media – from newspapers to radio to cinema to television to the internet and now hand held technologies.
What's actually happened, though, is that choice has expanded, and individual media have had to find new ways to connect with consumers."

Grant Blackley
Free TV Australia chairman
CEO Network TEN

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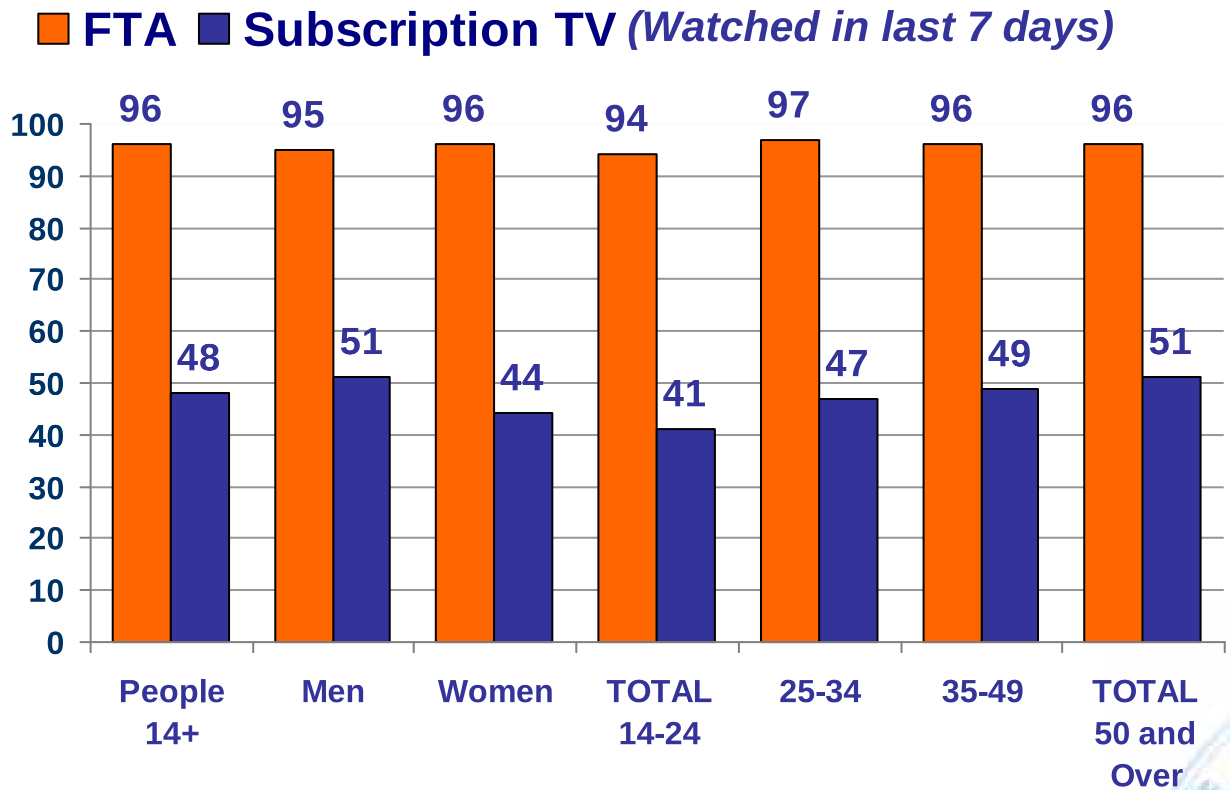
Is TV threatened by the new technologies…..

Free To Air TV has continued to develop its strengths after the introduction of Sky TV and it's continued development from 1990



Source: Roy Morgan Single Source New Zealand – NZDec06

Television Fragmentation of Audience forced to identify core programs for each target group

- *How can we engage the viewers…….*
  - *What consumers “Especially Choose to Watch”*
  - *Key Attention levels “Pay A Lot of Attention”*

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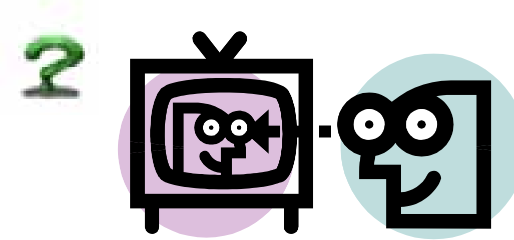
• TV Attention & Involvement



TV Attention

SUNDAY TV

Did you watch TV on SUNDAY? Yes ✓ (Continue)
No ☐ (Skip to MONDAY RADIO)

TIME	TV CHANNEL																Attention level		
Table commencing 5:30 A.M.	National						Pay TV									Local			
	One	2	3	C4	Maori TV	Prime	CNN	Discovery Channel	Living Channel	Sky 1	Sky Movies 1	Sky Movies 2	Sky Sport 1	Sky Sport 2	Other Pay TV	Regional TV	A lot	Some	Not much
5:30 – 5:59	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
6:00 – 6:29	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
6:30 – 6:59	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
7:00 – 7:29	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
7:30 – 7:59	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
8:00 – 8:29	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
8:30 – 8:59	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
9:00 – 9:29	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
9:30 – 9:59	☐	☐	✓	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	✓	☐
10:00 – 10:29	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
10:30 – 10:59	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
11:00 – 11:29	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
11:30 – 11:59	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
12:00 – 12:29	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

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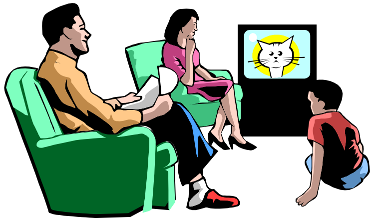
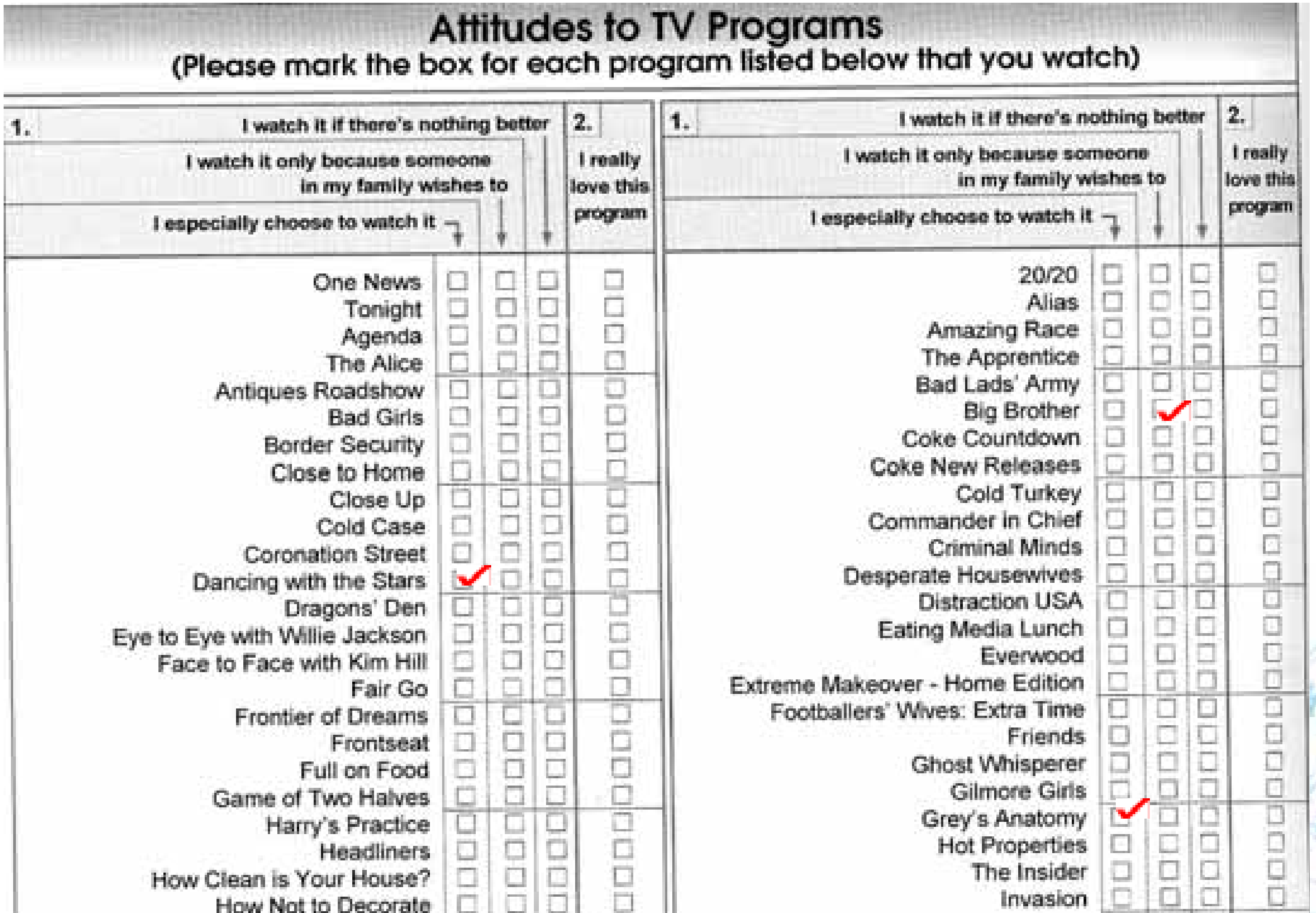
• TV Attention & Involvement



TV Involvement



Attitudes to TV Programs

(Please mark the box for each program listed below that you watch)

Program	1. I especially choose to watch it	I watch it only because someone in my family wishes to	I watch it if there's nothing better	2. I really love this program
One News	☐	☐	☐	☐
Tonight	☐	☐	☐	☐
Agenda	☐	☐	☐	☐
The Alice	☐	☐	☐	☐
Antiques Roadshow	☐	☐	☐	☐
Bad Girls	☐	☐	☐	☐
Border Security	☐	☐	☐	☐
Close to Home	☐	☐	☐	☐
Close Up	☐	☐	☐	☐
Cold Case	☐	☐	☐	☐
Coronation Street	☐	☐	☐	☐
Dancing with the Stars	✓	☐	☐	☐
Dragons' Den	☐	☐	☐	☐
Eye to Eye with Willie Jackson	☐	☐	☐	☐
Face to Face with Kim Hill	☐	☐	☐	☐
Fair Go	☐	☐	☐	☐
Frontier of Dreams	☐	☐	☐	☐
Frontseat	☐	☐	☐	☐
Full on Food	☐	☐	☐	☐
Game of Two Halves	☐	☐	☐	☐
Harry's Practice	☐	☐	☐	☐
Headliners	☐	☐	☐	☐
How Clean is Your House?	☐	☐	☐	☐
How Not to Decorate	☐	☐	☐	☐

Program	1. I especially choose to watch it	I watch it only because someone in my family wishes to	I watch it if there's nothing better	2. I really love this program
20/20	☐	☐	☐	☐
Alias	☐	☐	☐	☐
Amazing Race	☐	☐	☐	☐
The Apprentice	☐	☐	☐	☐
Bad Lads' Army	☐	☐	☐	☐
Big Brother	☐	✓	☐	☐
Coke Countdown	☐	☐	☐	☐
Coke New Releases	☐	☐	☐	☐
Cold Turkey	☐	☐	☐	☐
Commander in Chief	☐	☐	☐	☐
Criminal Minds	☐	☐	☐	☐
Desperate Housewives	☐	☐	☐	☐
Distraction USA	☐	☐	☐	☐
Eating Media Lunch	☐	☐	☐	☐
Everwood	☐	☐	☐	☐
Extreme Makeover - Home Edition	☐	☐	☐	☐
Footballers' Wives: Extra Time	☐	☐	☐	☐
Friends	☐	☐	☐	☐
Ghost Whisperer	☐	☐	☐	☐
Gilmore Girls	☐	☐	☐	☐
Grey's Anatomy	✓	☐	☐	☐
Hot Properties	☐	☐	☐	☐
The Insider	☐	☐	☐	☐
Invasion	☐	☐	☐	☐

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TV Attention & Involvement

ROY MORGAN SINGLE SOURCE NEW ZEALAND: JAN 2006 - DEC 2006

Filter: All cases

Layer: All cases

			SUMMARY GRID ALL CHANNELS - INVOLVEMENT			
			TOTAL Involvement (Column 2)	Especially choose to watch (Column 3)	Because family member wishes to (Column 4)	Watch if nothing better (Column 5)
	(unweighted)	uc	11636	11636	11636	11636
	(POPN '000)	wc	3264	3264	3264	3264
	SUMMARY GRID ALL CHANNELS - INVOLVEMENT					
1	3: CSI: Crime Scene Investigation	ix	100	74	11	15
2	3: SVU: Special Victims Unit	ix	100	71	11	18
3	3: House	ix	100	70	10	20
4	3: NCIS	ix	100	70	10	20
5	2: Without a Trace	ix	100	69	11	20
6	2: Grey's Anatomy	ix	100	69	15	15
7	1: One Network News	ix	100	68	18	14
8	3: Prison Break (from August 2006)	ix	100	67	17	15
9	3: Criminal Intent	ix	100	67	10	22
10	2: Lost	ix	100	67	17	16
11	3: CSI: Miami	ix	100	67	14	20
12	2: Scrubs	ix	100	66	14	21
13	3: Bones	ix	100	66	12	22
14	2: Desperate Housewives	ix	100	65	20	15
15	3: CSI: NY	ix	100	65	14	21
16	3: 3 News	ix	100	65	20	15
17	1: One Sport	ix	100	65	17	18
18	1: Cold Case	ix	100	64	14	23
19	PRM: Top Gear	ix	100	63	21	15
20	3: 60 Minutes	ix	100	63	13	24

With fragmentation of audience TV has embraced other forms of communication

- *Interactive TV*
- *Podcasting*
- *VOD (Video On Demand)*
- *ITV (IPTV)*

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With fragmentation of audience TV has embraced other forms of communication

- *Interactive TV*
- *Podcasting*
- *VOD (Video On Demand)*
- *ITV (IPTV)*

- *TEN's Big Brother, Thank God You're Here (Hungary Jacks)*
- *SBS online TV Player/Podcasts over 100,000 per week*
- *ABC's online offer download News, Current Affairs Programs, even entertainment programs "At The Movies".*
- *ReelTime and Yahoo 7, make current shows available on Yahoo7*
  - *$1 for old TV Series, $7 for a new release*
- *NineMSN more than 100,000 streamers for recent series Dancing On Ice & Logies*
  - *Pay per view for Catch up series…McLeod's Daughters download less than $2*

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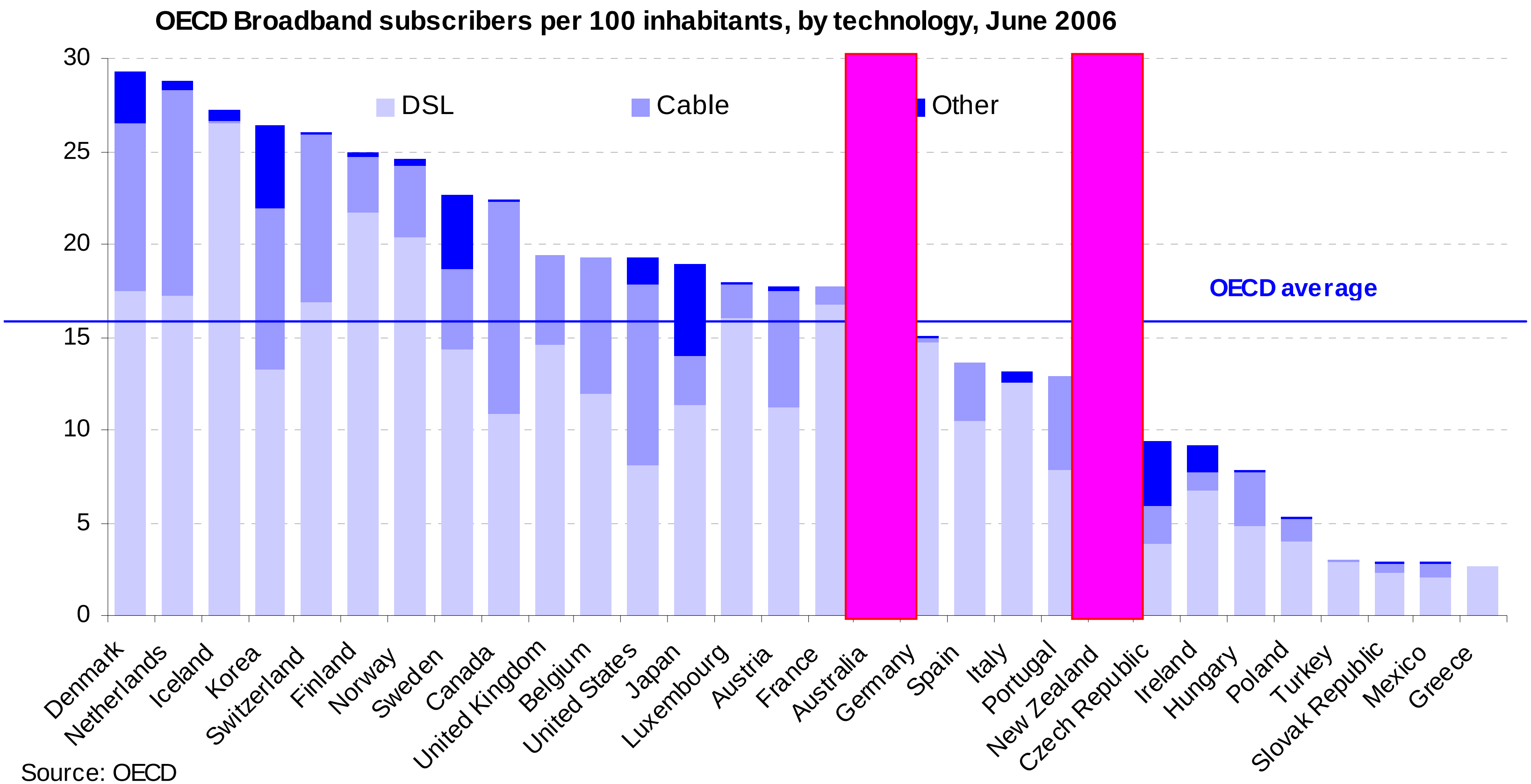
Future Threats for Television

- *Growth in Home Broadband Penetration*



Source: OECD
(Organisation for Economic Co-operation and Development)

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Broadband subscribers OECD Reported 33% increase 2005-2006 to 181million

	DSL	Cable	Other	Total	Rank	Total Subscribers
Denmark	17.4	9	2.8	29.3	**1**	1 590 539
Netherlands	17.2	11.1	0.5	28.8	**2**	4 705 829
Iceland	26.5	0	0.7	27.3	**3**	80 672
Korea	13.2	8.8	4.5	26.4	**4**	12 770 911
Switzerland	16.9	9	0.4	26.2	**5**	1 945 358
Finland	21.7	3.1	0.2	25	**6**	1 309 800
Norway	20.4	3.8	0.4	24.6	**7**	1 137 697
Sweden	14.4	4.3	4	22.7	**8**	2 046 222
Canada	10.8	11.5	0.1	22.4	**9**	7 161 872
United Kingdom	14.6	4.9	0	19.4	**10**	11 622 929
Belgium	11.9	7.4	0	19.3	**11**	2 025 112
United States	8	9.8	1.4	19.2	**12**	56 502 351
Japan	11.3	2.7	4.9	19	**13**	24 217 012
Luxembourg	16	1.9	0	17.9	**14**	81 303
Austria	11.2	6.3	0.2	17.7	**15**	1 460 000
France	16.7	1	0	17.7	**16**	11 105 000
Australia	13.9	2.9	0.6	17.4	**17**	3 518 100
Germany	14.7	0.3	0.1	15.1	**18**	12 444 600
Spain	10.5	3.1	0.1	13.6	**19**	5 917 082
Italy	12.6	0	0.6	13.2	**20**	7 697 249
Portugal	7.9	5	0	12.9	**21**	1 355 602
New Zealand	10.7	0.5	0.6	11.7	**22**	479 000
Czech Republic**	3.9	2	3.5	9.4	**23**	962 000
Ireland	6.8	1	1.4	9.2	**24**	372 300
Hungary	4.8	2.9	0.1	7.8	**25**	791 555
Poland	3.9	1.3	0.1	5.3	**26**	2 032 700
Turkey	2.9	0	0	3	**27**	2 128 600
Slovak Republic	2.2	0.5	0.2	2.9	**28**	155 659
Mexico*	2.1	0.7	0	2.8	**29**	2 950 988
Greece	2.7	0	0	2.7	**30**	298 222
OECD	**9.7**	**4.6**	**1.2**	**15.5**		**180 866 265**

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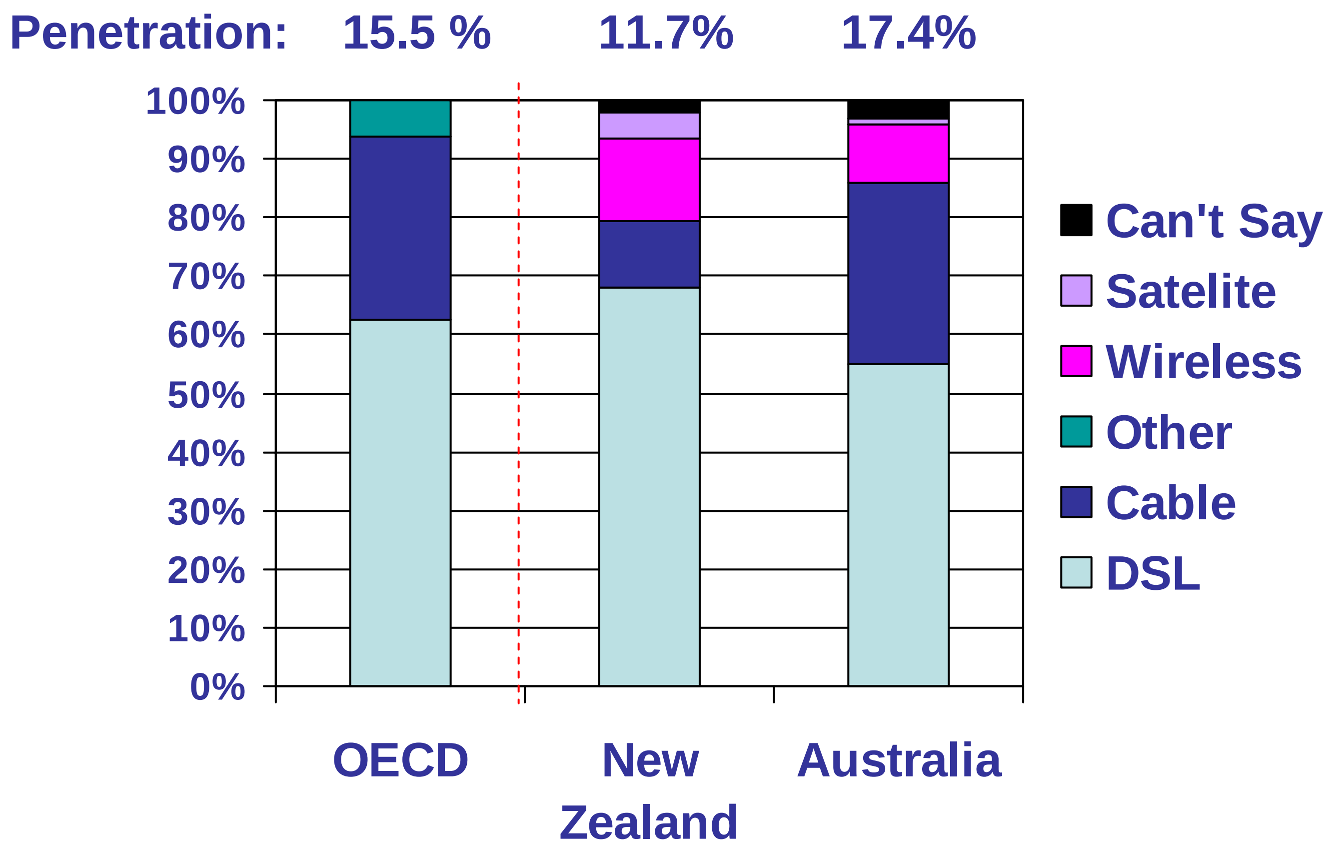
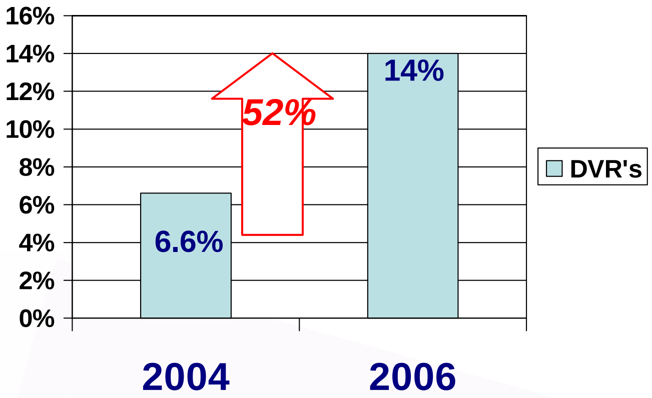
Future Threats for Television

- *Growth in Home Broadband Penetration*



Future Threats for Television

- Growth in Home Broadband Penetration
- Growth in DVR's
- Growth in Digital transmission for FTA & further development of HDTV



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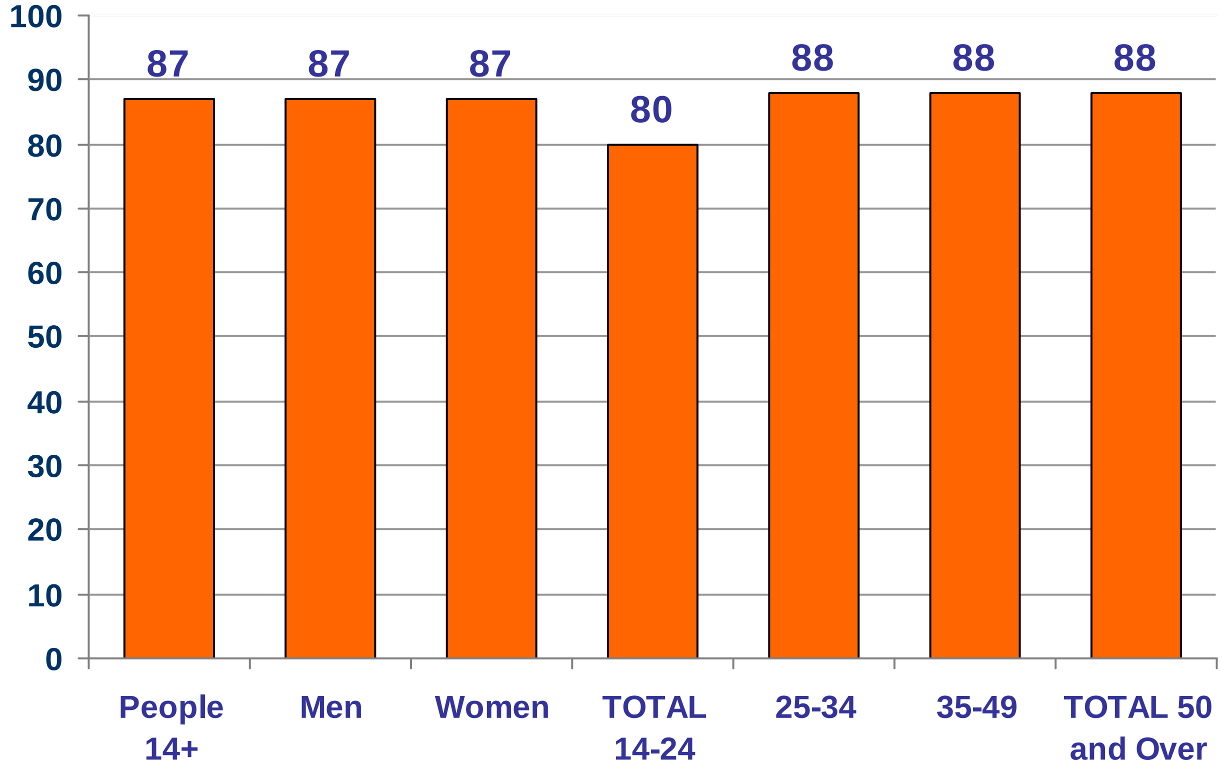
Radio

Listened to any radio in last 7 days



Source: Roy Morgan Single Source New Zealand – NZDec06

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Radio

- *Radio Networks will continue to generate an increasingly diverse mix of revenue streams, satisfying an increasingly varied and geographically dispersed demand for radio content:-*
    - *Analogue*
    - *Digital*
    - *High Definition*
    - *Free Streaming*
    - *Subscription Services*
    - *Podcasts*
    - *Archive Services*

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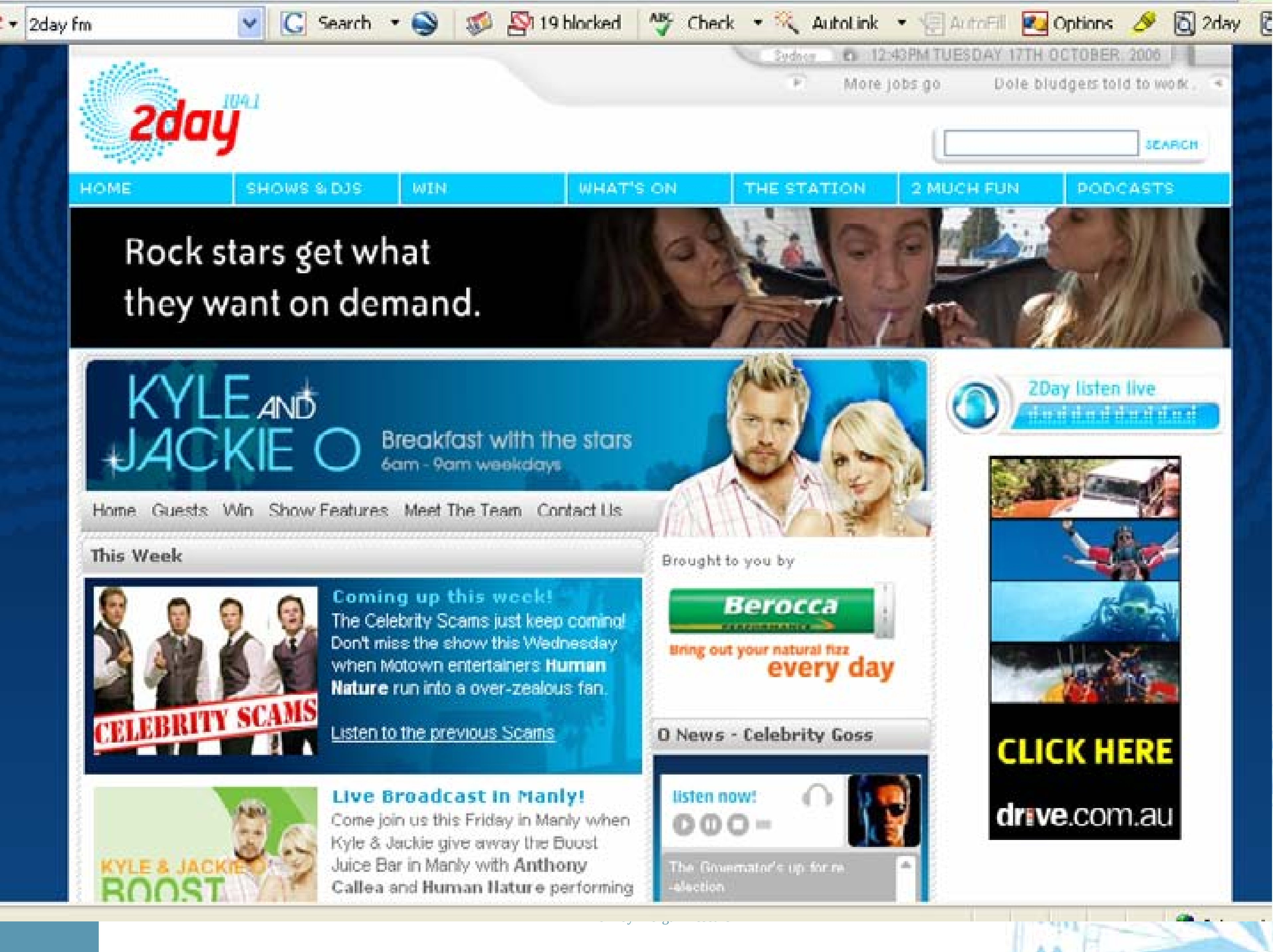
Radio

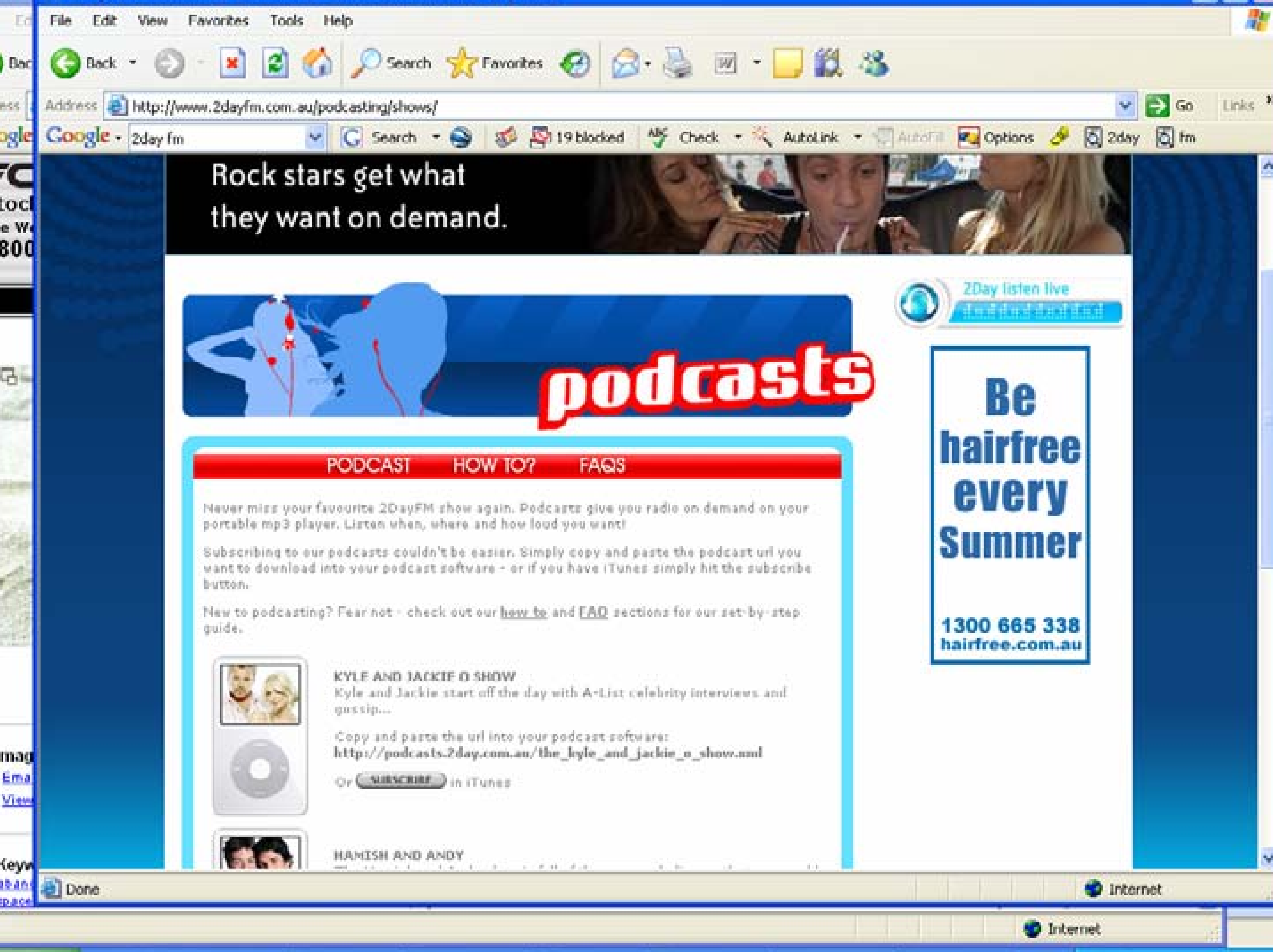
- *Radio listeners are likely to enjoy increasing control over what they listen to, when they listen to it (live broadcast or time-shifted playback) and how they listen to it.*

- *Choice on the amount of advertising they are exposed to will increase with developing opportunities to purchase content.*

- *Consumers who miss a broadcast can buy a replay*
- *Classic broadcast archives can be sold as downloads*
- *Premium content reserved for Subscribers only*
- *Increase in IP listeners allow for greater accuracy in measurement therefore new approaches to charging*

- *Radio and TV Networks should enjoy a growing range of opportunities to charge for content and advertising.*


2day fm
Search
19 blocked
Check
AutoLink
AutoFill
Options
2day
12:43PM TUESDAY 17TH OCTOBER 2006
More jobs go
Dole bludgers told to work
104.1
2day
SEARCH
HOME
SHOWS & DJS
WIN
WHAT'S ON
THE STATION
2 MUCH FUN
PODCASTS
Rock stars get what they want on demand.
KYLE AND JACKIE O
Breakfast with the stars
6am - 9am weekdays
Home
Guests
Win
Show Features
Meet The Team
Contact Us
2Day listen live
This Week
Coming up this week!
The Celebrity Scams just keep coming! Don't miss the show this Wednesday when Motown entertainers Human Nature run into a over-zealous fan.
CELEBRITY SCAMS
Listen to the previous Scams
Brought to you by
Berocca
Bring out your natural fizz every day
Live Broadcast in Manly!
Come join us this Friday in Manly when Kyle & Jackie give away the Boost Juice Bar in Manly with Anthony Callea and Human Nature performing
KYLE & JACKIE O
BOOST
O News - Celebrity Goss
listen now!
The Governator's up for re -election
CLICK HERE
drive.com.au


File Edit View Favorites Tools Help
Back Search Favorites
Address http://www.2dayfm.com.au/podcasting/shows/
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Rock stars get what they want on demand.
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Or SUBSCRIBE in iTunes
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Be hairfree every Summer
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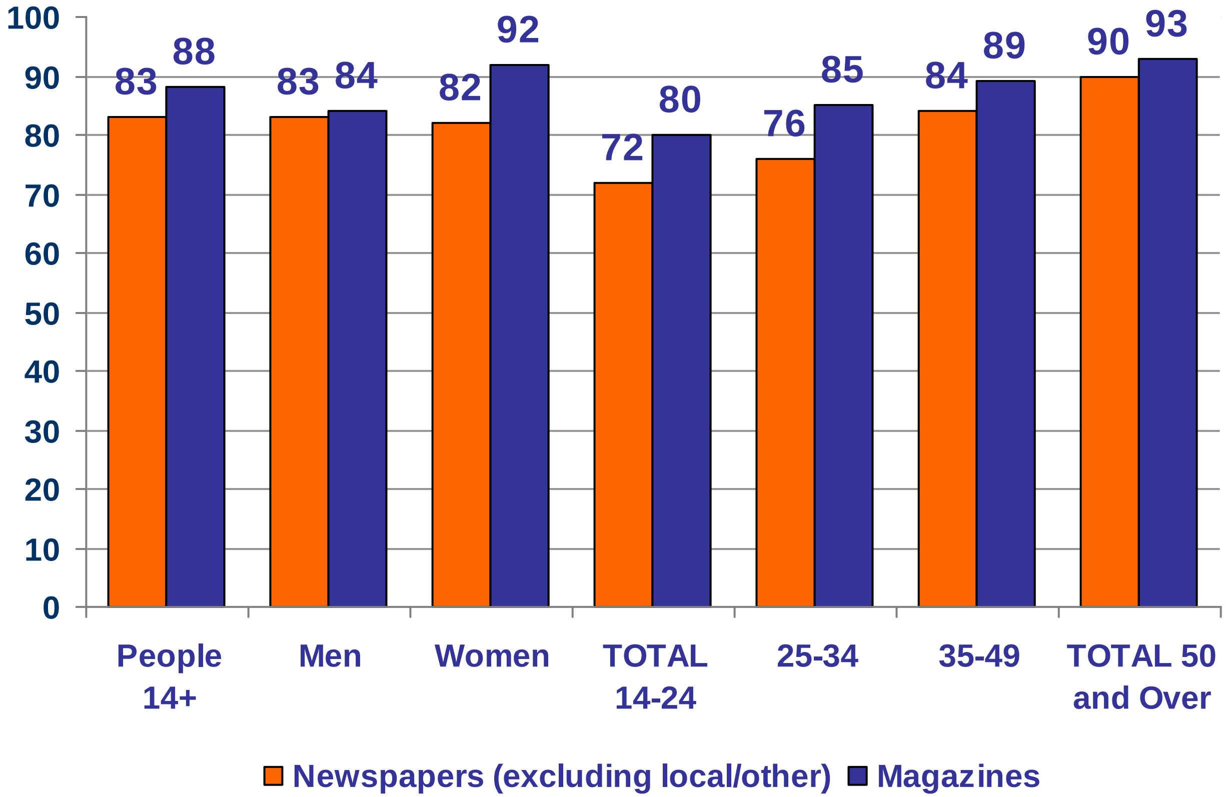
Done
Internet

PRINT



Source: Roy Morgan Single Source New Zealand – NZDec06

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PRINT

- Newspapers continue to struggle to maintain circulations and the readership continues to skew old. However similar to TV, advertisers continue to pay annual rate increases.
- This is tolerated as in most markets there is generally one main newspaper.
- However newspapers have taken the initiative to get on-line, in many cases, the online version of the local newspaper has the highest no. of impressions of any content site for their defined area.

Newspapers are transforming rather than disappearing

New Zealand Herald

	2006 '000
Monday - Friday av. Issue readership	696
Newspaper only	531
nzherald.co.nz only	229
Both newspaper & online	165
TOTAL READERS	**925**

Source: Roy Morgan Single Source, January 2007

Filtered from August 2006 (website visitation added to survey)

MAGAZINES

- **The magazine industry is already fragmented. Thus technology has had less impact on the magazine industry from an advertising/media fragmentation perspective**
- **Magazines cater for just about any interest**
- **However recognising the strength held in the youth target market Pacific Magazines have taken the initiative to trial new on line strategies…….**

Emag -"Red Zero"

Joint Venture with Coles Myer – Target

Aimed at Women aged 18-29

Published 4 times a year – monthly updates sent via email to people who register on the "Red Zero" website.

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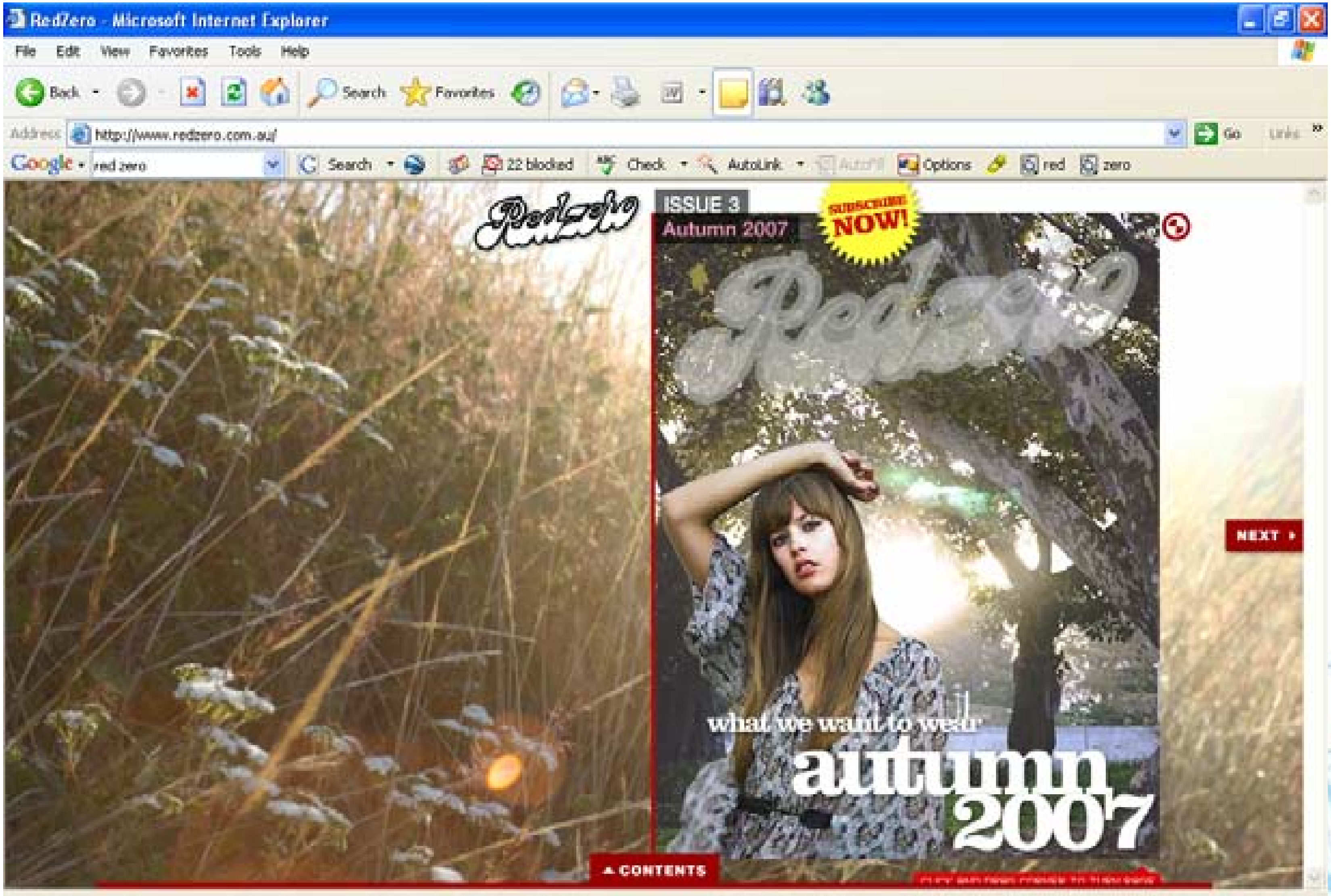
http://www.redzero.com.au/



Navigating the Consumer Landscape......

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- ***This time the dot.com bubble is not going to burst, now is time to embrace digital technologies.***
- ***Broadband, Wireless, 3G although in their juvenile years, like our youth of today will mature quicker than we think.***
- ***Like it or not today's technology has the potential to change the way brands are marketed as more and more consumers begin interacting with this new content.***

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- ***Consumers will exert greater control over their interface with each mediums content and advertising***

- ***Be warned to negotiate your path to success the key is not only understanding the fragmentation of the media, it is understanding the fragmentation of your consumer…….***

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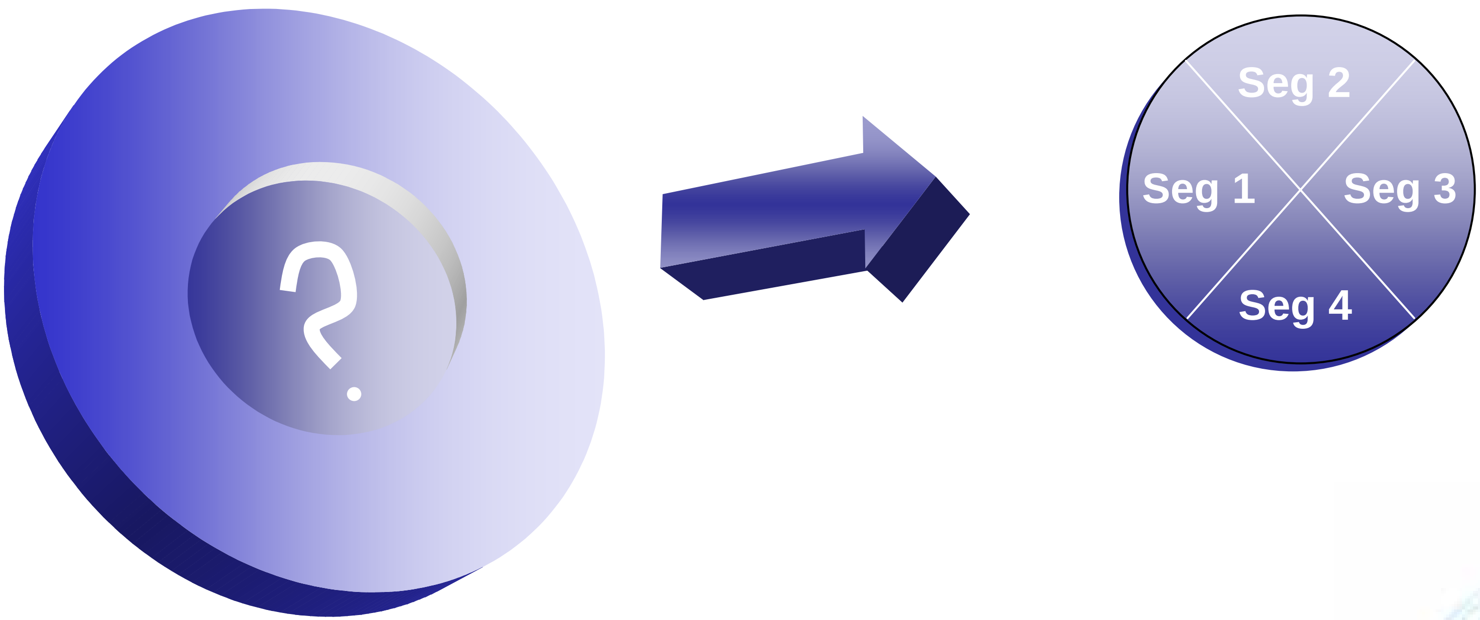
You may think you have defined your primary consumers however can further sub-groups exist within that group of consumers?



Roy Morgan Research

New Pre-Soaker Get's things whiter than white…..

- Female Grocery Buyers 18-39 – **586,000**

BRAND LOYAL
CORE LABELS
HATES CHANGE

136,000

ACTIVE SOCIAL
STAND OUT LOOKS ARE IMPORTANT
LOVE TO SOLVE PROBLEMS

137,000

BARGAIN SEEKER
NOT EMOTIONALLY ATTACHED TO A BRAND
TRY ANYTHING…
LOVES COMPETITIONS

166,000

STORE BRANDS
ENVIRONMENTALLY CONSCIOUS
ALWAYS READY TO TRY NEW PRODUCTS

147,000

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New Pre-Soaker Get's things whiter than white…..

MEDIA TYPOLOGY INDEX (SUMMARY)

		TOTAL	Any Newspaper in last 7 days (excl Local/ Other Newspapers)	Any Magazine	Any Television in last 7 days	Any Radio in last 7 days	Been to Cinema in last 4 weeks	Read any catalogue in last 4 weeks	Access the Internet at least monthly
(unweighted)		11636	9621	10347	11281	10113	3465	10090	9053
(POPN '000)		3264	2694	2870	3158	2826	1009	2822	2622
PRE-SOAKERS									
CLUSTER 0	wc	2678	2228	2334	2583	2316	844	2280	2108
	v%	82.00%	82.70%	81.30%	81.80%	81.90%	83.70%	80.80%	80.40%
	ix	100	101	99	100	100	102	98	98
BRAND LOYAL	wc	136	113	126	135	121	39	124	124
	v%	4.20%	4.20%	4.40%	4.30%	4.30%	3.90%	4.40%	4.70%
	ix	**100**	**101**	**105**	**102**	**103**	**93**	**105**	**114**
STAND OUT SOCIAL	wc	137	109	126	136	120	42	129	120
	v%	4.20%	4.00%	4.40%	4.30%	4.20%	4.20%	4.60%	4.60%
	ix	**100**	**97**	**105**	**102**	**101**	**100**	**109**	**109**
BARGAIN SEEKER	wc	166	128	153	161	140	38	161	141
	v%	5.10%	4.70%	5.30%	5.10%	5.00%	3.80%	5.70%	5.40%
	ix	**100**	**93**	**105**	**100**	**97**	**74**	**112**	**106**
STORE BRANDS	wc	147	116	130	143	129	45	129	128
	v%	4.50%	4.30%	4.50%	4.50%	4.60%	4.50%	4.60%	4.90%
	ix	**100**	**95**	**101**	**101**	**102**	**99**	**101**	**109**

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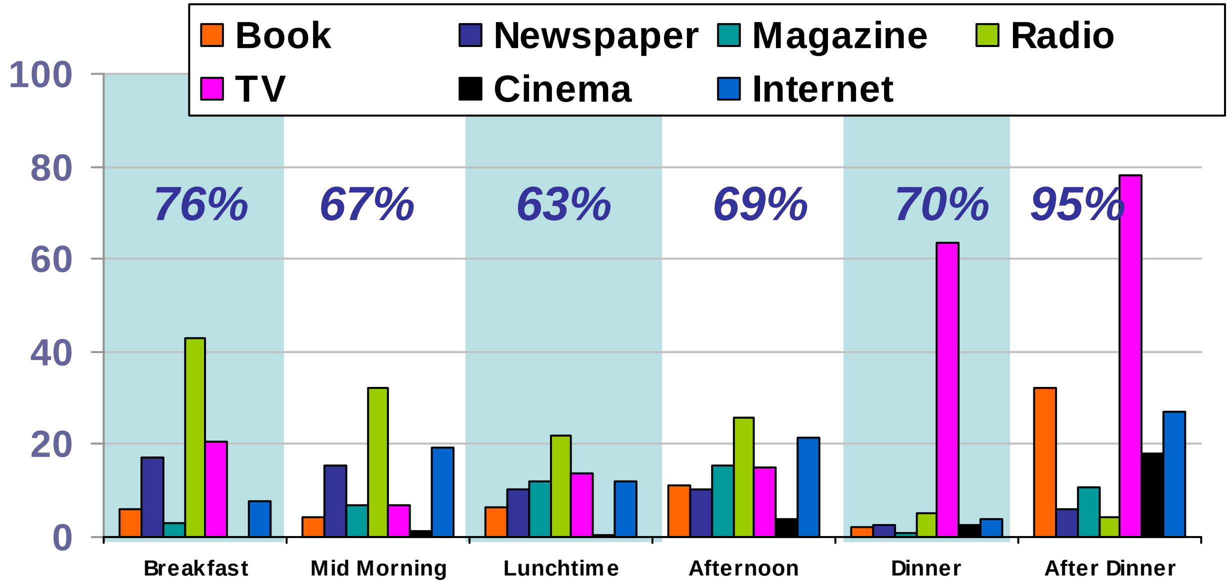
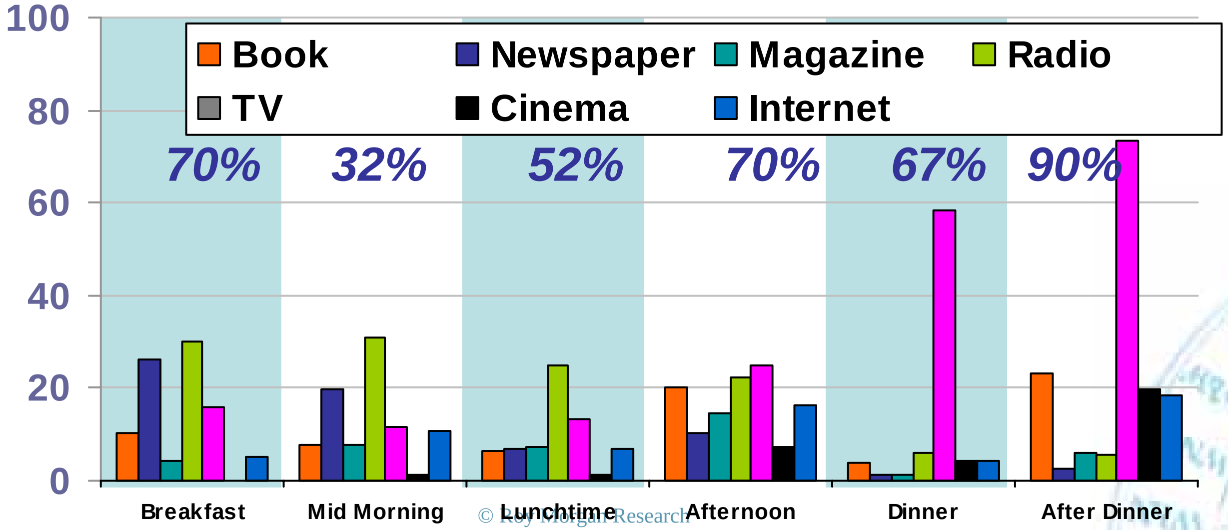
Tracking consumption throughout the day to identify appropriate touchpoints

Weekday's



Weekends



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Media convergence at all levels will further fractionalize television audiences, large audiences will still be attracted to certain programs and event broadcasts, audience sizes will erode as niche programming becomes tailored to more specific interest and tastes. Television is poised to further develop its interactivity with consumers.

In it's infancy we are still analysing consumer behaviours and have not yet arrived at a suitable model for evaluating advertising within the digital age. However it is evident we must look beyond the quantitative measurements of the past.

Changes already occuring……

Google …further trialling charge on no. responses as opposed to no. of hits to 75 advertisers. Advertisers to examine exactly what action they would like the consumer to take.

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Syndicated measurements on how the consumers engage within the digital arena, along with how they react with the brand exposure are the new pathways to be mapped for future consumption.