

TELEVISION GENRE ANALYSIS

This report analyses free to air programming, by genre and network, over the 2009 - 2010 financial year. It provides practitioners with an insight into networks' programming strategies and may potentially enable practitioners to pinpoint the most appropriate 'home' and timeslot for their project.



Methodology

This report analyses Victorian Free To Air (FTA) television programming by network and genre from 1/07/2009 to 31/7/2010. Where secondary digital channels were introduced during that period, data has been included from the channel's start date. Raw programming data was sourced from HWW Pty Ltd and analysed by Film Victoria.

Genres in the data HWW Pty Ltd data included:

Documentary	Arts and Culture	Science and Technology
Drama	Short	Education
Comedy	Horror	Talk Show
Sport	Musical	Travel
Action	Romantic Comedy	Fantasy
Animation	Current Affairs	Film-Noir
Entertainment	Sci-Fi	Variety
Lifestyle	Romance	Historical
Music	Religion	Foreign
Crime	War	Soap Opera
Reality/Real-Life	Biography	Business and Finance
Children	Sitcom	Parliament
Thriller	Murder/Mystery	Weather
Adventure	Mystery	Shopping
Western	Cartoon	Infotainment
Family	Game Show	Adult
News	Nature	Suspense

For the purpose of effective analysis, complementary genres have been combined.

All genres used in the HWW data	Film Victoria combined genre
Action, Adult, Adventure, Drama, Suspense, Thriller, Soap Opera, Fantasy, Film Noir, Crime, Historical, Horror, Murder/Mystery, Musical, Mystery, War, Western, Sci-Fi, Romance	Drama
Comedy, Situation Comedy	Comedy
Documentary	Documentary
Lifestyle (Magazine), Infotainment, Shopping	Lifestyle & Infotainment
Sport	Sport
Children's, Animation, Cartoons, Family	Animation and Children
News, Current Affairs, Business & Finance, Weather, Parliament, Foreign News	News & Current Affairs
Talkshow, Variety (inc Music), Entertainment, Reality, Gameshow,	Reality & Variety
Arts and Culture, Biography, Education, Nature, Science programmes	Factual
N/A and miscellaneous genres	Other

As this study aims to investigate scheduling strategies and programme availability, analysis has been conducted on the genre share of all timeslots. This means that all individual episodes of a television series and repeat programming are included in calculations. The count of all timeslots is valuable because it demonstrates the proportion of all FTA broadcasting consumed by different genres.

Please see the appendix for the genre share of individual programmes (i.e. where only episode 1 of the series is counted and all other episodes and any repeat episodes have been excluded from the count). This information can provide an insight into general genre representation on FTA television, as it excludes multiple counts of programmes such as news bulletins which appear very frequently throughout the course of each day.

Genre classifications and overall share of FTA programming

Combined Genres across all FTA TV

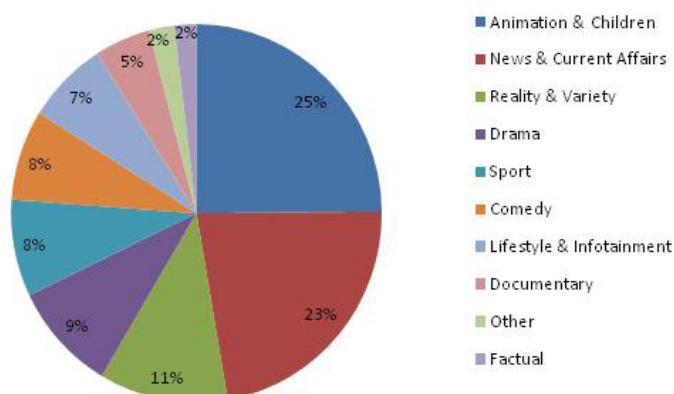


Chart 1 illustrates the percentage share of all programming on FTA television by these combined genres. It includes all timeslots. The dominance of Animation, Children, News and Current Affairs is evident.

Chart 1

Detailed analysis of selected genre programming on FTA television networks.

Animation and Children's Programming

Animation and Children accounts for approximately 25% of the programming on FTA television during the reporting period. Within this category Animation and Cartoon programmes represented 12.3% and Children and Family represented 12.5%. Charts 2 and 3 illustrate that ABC2 is the dominant network in the programming of these genres along with the other ABC channels. The commercial digital channel Go! also programmes a significant share of Animation and Cartoons.

% Combined Family and Children Genres by Channel

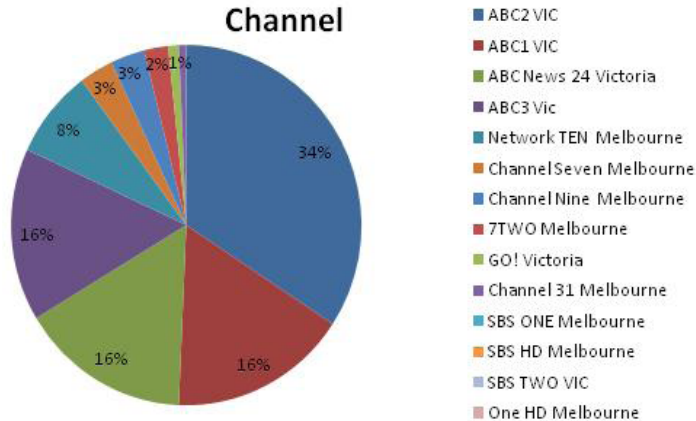


Chart 2

% Combined Animation & Cartoon Genres by Channel

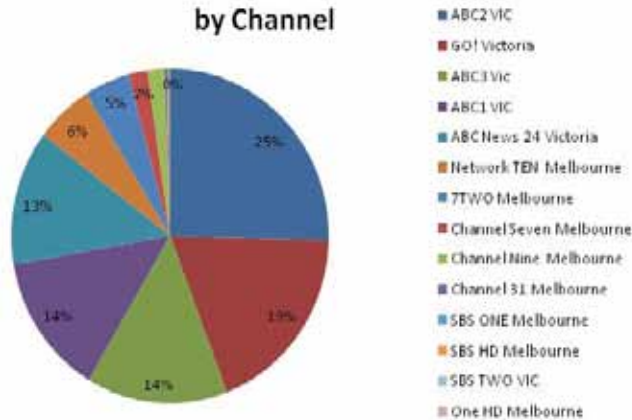


Chart 3

Reality and Variety

The combination of Reality and Variety accounts for 11% of the programming on FTA television in Australia during the reporting period. Entertainment programmes such as ‘Australia’s Funniest Home Movies’ and specials like the ‘2009 Rock Eisteddfod Challenge’ make up the largest portion of this category at 3.6%, music clip programmes and live music concerts equal 2.1%, and Reality (i.e. Masterchef, The Biggest Loser, Cops) were 1.9%. The rest of this segment, Talk shows, Game Shows and Variety programmes (i.e. ‘Hey, Hey It’s Saturday’) represented an even smaller amount of scheduled programming. Channel 31 schedules the most of these types of programmes followed by Network Ten and Channel Nine.

% Reality and Variety Genres by Channel

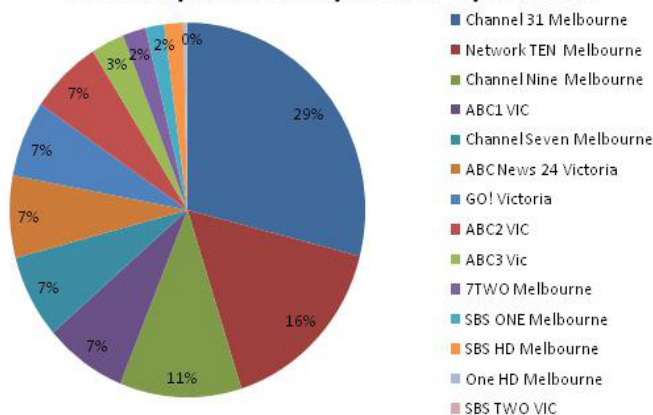


Chart 4

Drama

When combined, the genres of Drama, Action, Adventure, Mystery, Murder Mystery, Soap Opera, Thriller, Suspense, Romance, Romantic Comedy, Crime, Film Noir, Adult, War, Horror, Historical, Musical and Western make up 9% of programming. This includes feature films as well as ongoing series. Programmes classified as Soap Operas, Drama and Crime constituted a large majority of this category. All channels had a comparable distribution of Drama programming, however 7Two Melbourne lead the pack due to the screening of a significant number of long running soap operas ('Home and Away', 'Sons and Daughters', 'Coronation Street') and repeats of older television series ('Magnum P.I.', 'Murder She Wrote', 'The Sopranos').

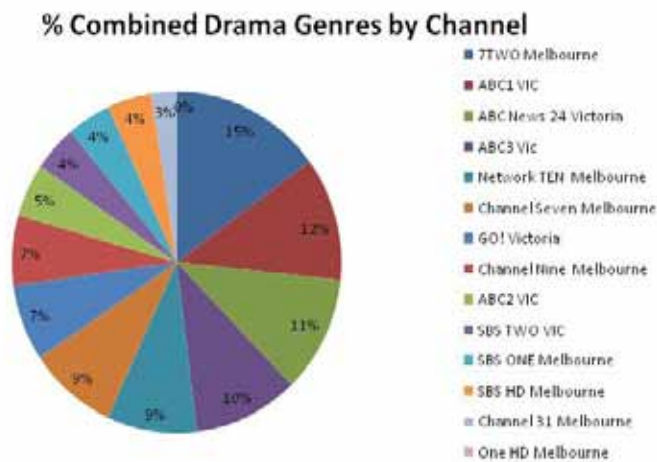


Chart 5

Comedy

The Comedy category accounts for approximately 8% of overall programming and incorporates Comedy films and series (4.1%) and Situation Comedy programmes (3.6%). Go! represents almost half of all Comedy scheduling through the programming of repeat Sitcom series such as 'Seinfeld', 'Frasier', 'I Dream of Jeanie' and 'Bewitched'. New programmes such as Community and 'The Inbetweeners' were also screened by Go!. Comedy films were also a mixture of classic films such as the 'Policy Academy' and 'National Lampoon's Vacation' movies and newer titles like 'Harold and Kumar Escape From Guantanamo Bay' and 'Talladega Nights: The Ballad of Ricky Bobby'. ABC2 had less programming slots and less overall comedy programmes, but screened some Australian comedy such as 'The Chaser', 'The Librarians', 'Very Small Business', 'Chandon Pictures' and 'Lawrence Leung's Choose Your Own Adventure'.

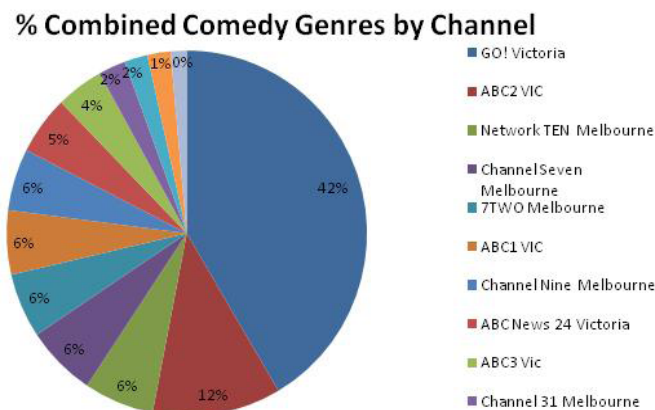


Chart 6

Lifestyle and Infotainment

Lifestyle and Infotainment (also incorporating magazine style travel shows and shopping programmes) represented 7% of the overall scheduled programming. Channel 31 had the most timeslots within this genre, with 50 individual lifestyle programmes such as the exercising show ‘Move It or Lose It’, motoring programmes ‘Gasolene’, ‘Going 4WD’ and ‘Two Wheel Torque’, and numerous cooking and hobby based programmes. Network Ten, 7Two, Channel Nine and Channel Seven follow, each with a share of around 13% in Lifestyle and Infotainment

% Combined Infotainment & Lifestyle Genres by Channel

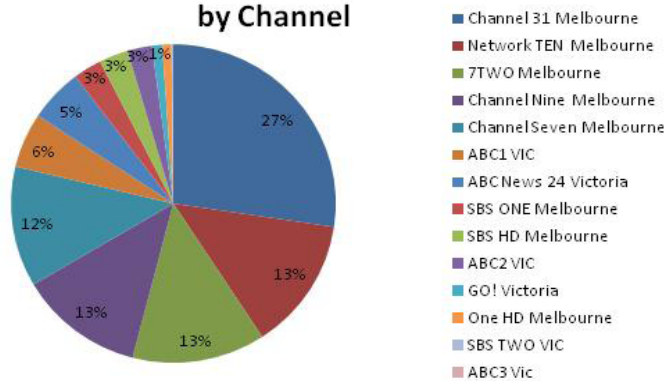


Chart 7

Documentary

Documentary programmes had 5% of scheduled timeslots with SBS One/SBS HD, ABC 1, ABC News and ABC2 dominating the scheduling of this genre. SBS One/SBS HD had 504 individual documentaries or documentary series while ABC 1 screened 422 during the sample period.

Documentary Genre by Channel

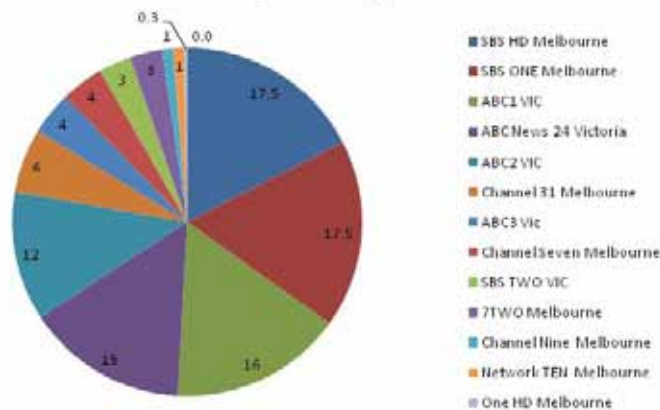


Chart 8

Factual

Arts and Culture, Biography, Education, and Nature and Science programmes have been classified as other Factual content and represent a combined share of approximately 2% of all programming. While there may be some genre crossover to other formats, these factual programmes generally differ from traditional documentaries and follow a more panel/magazine presentation format, however they are arguably more educational and less promotional than lifestyle programmes. Examples include ‘The New Inventors’, ‘First Tuesday Book Club with Jennifer Byrne’, ‘Arts Masterclass’, ‘Australian Biography’ and ‘Rough Science’. These programmes have more timeslots on Channel 31 and the ABC channels.

Ratings: Popular Programmes 2009²

5 metro cities nationally

TOP PROGRAMMES OVERALL

1	MASTERCHEF - THE WINNER ANNOUNCED	4,946,000
2	MASTERCHEF - FINALE NIGHT	4,427,000
3	AFL GRAND FINAL ST KILDA V GEELONG	3,702,000
4	RUGBY LEAGUE GRAND FINAL	3,632,000
5	MELBOURNE CUP-THE RACE	3,564,000
6	STATE OF ORIGIN NSW V QLD 1ST - MATCH	3,441,000
7	STATE OF ORIGIN NSW V QLD 2ND - MATCH	3,216,000
8	AFL GRAND FINAL POST MATCH PRESENTATION	3,115,000
9	TENNIS: 2009 AUST OPEN - DAY 9 NIGHT SESSION	3,109,000
10	HEY HEY REUNION EP 1	3,037,000
11	TENNIS: 2009 AUST OPEN - MEN'S FINAL	3,011,000
12	HEY HEY REUNION EP 2	2,991,000
13	TWENTY/20 - AUSTRALIA V SOUTH AFRICA GAME 2	2,940,000
14	STATE OF ORIGIN NSW V QLD 3RD - MATCH	2,923,000
15	UNDERBELLY: A TALE OF TWO CITIES	2,910,000
16	TWENTY/20 - AUSTRALIA V SOUTH AFRICA	2,781,000
17	THE BIGGEST LOSER (AUS) - THE WINNER	2,769,000
18	PACKED TO THE RAFTERS	2,647,000
19	THE BIGGEST LOSER (AUS) - FINALE NIGHT	2,393,000
20	STATE OF ORIGIN NSW V QLD 1ST - PRE MATCH	2,366,000

TOP REGULAR PROGRAMMES

1	UNDERBELLY: A TALE OF TWO CITIES	2,910,000
2	PACKED TO THE RAFTERS	2,647,000
3	MASTERCHEF AUSTRALIA - CHALLENGE	2,322,000
4	TALKIN' 'BOUT YOUR GENERATION	2,154,000
5	FIND MY FAMILY	2,146,000
6	THE ZOO	2,133,000
7	SEVEN NEWS - SUNDAY	2,129,000
8	WORLD'S STRICTEST PARENTS	2,082,000
9	MASTERCHEF AUSTRALIA	2,043,000
10	THANK GOD YOU'RE HERE	2,037,000
11	RSPCA ANIMAL RESCUE	2,034,000
12	BORDER SECURITY - AUS FRONT LINE	2,016,000
13	SEVEN NEWS	2,000,000
14	SURF PATROL	1,980,000
15	LAST CHANCE SURGERY	1,978,000
16	NCIS	1,965,000
17	DANCING WITH THE STARS	1,964,000
18	NINE NEWS SUNDAY	1,943,000
19	AUSTRALIA'S GOT TALENT	1,937,000
20	TRIPLE ZERO HEROES	1,914,000

² 2009 Year in Review, Free TV Australia Industry Report, 5 February 2010

Light Entertainment, Reality, Info/Lifestyle & Comedy

1	MASTERCHEF - WINNER ANNOUNCED	4,946,000
2	MASTERCHEF - FINALE NIGHT	4,427,000
3	HEY HEY REUNION EP 1	3,037,000
4	HEY HEY REUNION EP 2	2,991,000
5	BIGGEST LOSER (AUS) - THE WINNER	2,769,000
6	BIGGEST LOSER (AUS) - FINALE NIGHT	2,393,000
7	MASTERCHEF - CHALLENGE	2,322,000
8	TALKIN' 'BOUT YOUR GENERATION	2,154,000
9	FIND MY FAMILY	2,146,000
10	THE ZOO	2,133,000
11	DANCING WITH THE STARS - GRAND FINAL	2,090,000
12	WORLD'S STRICTEST PARENTS	2,082,000
13	BORDER SECURITY - MONDAY	2,044,000
14	MASTERCHEF AUSTRALIA	2,043,000
15	THANK GOD YOU'RE HERE	2,037,000
16	RSPCA ANIMAL RESCUE	2,034,000
17	BIGGEST LOSER (AUS) - FINAL WEIGH-IN	2,018,000
18	AUSTRALIAN IDOL - WINNER ANNOUNCED	2,017,000
19	BORDER SECURITY - AUST FRONT LINE	2,016,000
20	SURF PATROL	1,980,000

Specials

1	A LION CALLED CHRISTIAN	2,286,000
2	TV WEEK LOGIE AWARDS ARRIVALS	2,275,000
3	51ST ANNUAL TV WEEK LOGIE AWARDS	2,199,000
4	MIRACLE OF THE HUDSON PLANE CRASH	2,010,000
5	UNLIKELY ANIMAL FRIENDS	1,991,000
6	THE MICHAEL JACKSON STORY	1,780,000
7	A TRIBUTE TO DON LANE	1,693,000
8	ON BOARD AIR FORCE ONE	1,675,000
9	BATTLE AT KRUGER PARK	1,637,000
10	INSIDE QUEEN MARY 2	1,575,000
11	MICHAEL JACKSON: THE LAST TIME	1,573,000
12	10 THINGS ABOUT LOSING WEIGHT	1,527,000
13	AUSTRALIA UNITES	1,480,000
14	COMING HOME	1,407,000
15	THE 81ST ANNUAL ACADEMY AWARDS	1,360,000
16	MICHAEL JACKSON THE KING OF POP	1,359,000
17	BIG BARRA WITH MALCOLM DOUGLAS	1,345,000
18	RELENTLESS ENEMIES: LIONS AND BUFFALO	1,315,000
19	STONEHENGE DECODED	1,241,000
20	INSIDE SUPER CARRIER	1,222,000

Children's Programmes

1	HAPPY FEET	1,314,000
2	OPEN SEASON	1,285,000
3	SHREK THE THIRD	1,075,000
4	SATURDAY DISNEY	368,000
5	W.I.T.C.H	352,000
6	SCOOBY DOO! LOCH NESS	349,000
7	SCOOBY DOO! PIRATES AHOY	290,000
8	DENNIS & GNASHER	289,000
9	FLIPPER AND LOPAKA	284,000
10	HANNAH MONTANA	275,000
11	TOON DISNEY	271,000
12	KID'S WB ON NINE	265,000
13	GO GO STOP	226,000
14	ZEKE'S PAD	225,000
15	MASTER RAINDROP	222,000
16	SNAKE TALES	220,000
17	TRAPPED	218,000
18	TRIBE: THE NEW TOMORROW	209,000
19	ERKY PERKY	208,000
20	DIVE OLLY DIVE	206,000

Drama

1	UNDERBELLY: A TALE OF TWO CITIES	2,910,000
2	PACKED TO THE RAFTERS	2,647,000
3	ALL SAINTS-THE FINALE	2,150,000
4	NCIS	1,965,000
5	SEA PATROL	1,878,000
6	MERLIN	1,855,000
7	CITY HOMICIDE-MONDAY	1,762,000
8	CRIMINAL MINDS	1,730,000
9	BONES	1,688,000
10	CITY HOMICIDE-SUNDAY	1,685,000
11	ALL SAINTS	1,684,000
12	FLASHFORWARD	1,676,000
13	LAW AND ORDER: SVU	1,582,000
14	HOME AND AWAY	1,557,000
15	CSI: CRIME SCENE INVESTIGATION	1,504,000
16	GREY'S ANATOMY	1,495,000
17	THE MENTALIST	1,485,000
18	CITY HOMICIDE-WEDNESDAY	1,478,000
19	CRIMINAL MINDS-MONDAY	1,468,000
20	RUSH	1,467,000

APPENDIX

PERCENTAGE OF GENRE PROGRAMMING FOR ALL TIMESLOTS

News	17.7%
Animation /Cartoon	12.3%
Children	11.1%
Sport	8.3%
Drama	5.4%
Documentary	4.9%
Lifestyle	4.6%
Comedy	4.1%
Sitcom	3.6%
Entertainment	3.6%
Current Affairs	2.5%
Music	2.1%
Shopping	2.1%
Reality/Real-Life	1.9%
Weather	1.6%
Family	1.5%
Talk Show	1.4%
Game Show	1.4%
Religion	1.2%
Soap Opera	1.0%
N/A	0.8%
Crime	0.8%
Variety	0.7%
Arts and Culture	0.7%
Science and Technology	0.6%
Action	0.6%
Adventure	0.5%
Education	0.4%
Travel	0.3%
Foreign	0.3%
Parliament	0.2%
Short	0.2%
Thriller	0.2%
Nature	0.1%
Sci-Fi	0.1%
Western	0.1%
Business and Finance	0.1%
Fantasy	0.1%
Infotainment	0.1%
Biography	0.1%
Horror	0.1%
Historical	0.1%
Musical	0.1%
Murder/Mystery	0.1%
Romantic Comedy	0.1%
War	0.1%
Romance	0.0%
Mystery	0.0%
Film -Noir	0.0%
Adult	0.0%
Suspense	0.0%

PERCENTAGE OF INDIVIDUAL PROGRAMMES ON FTA TV BY GENRE (MULTIPLE EPISODES AND REPEATS NOT INCLUDED)

Documentary	17.79%
Drama	15.22%
Comedy	12.09%
Sport	8.46%
Animation /Cartoon	4.28%
Action	4.04%
Entertainment	3.10%
Lifestyle	2.73%
Music	2.42%
Crime	2.28%
Reality/Real-Life	2.18%
Children	2.17%
Thriller	2.13%
Adventure	1.69%
Western	1.63%
Family	1.54%
News	1.44%
Arts and Culture	1.37%
Short	1.16%
Horror	1.04%
Musical	0.97%
Romantic Comedy	0.92%
Current Affairs	0.79%
Sci-Fi	0.77%
Romance	0.67%
Religion	0.62%
War	0.54%
Biography	0.51%
Sitcom	0.50%
Murder/Mystery	0.46%
Mystery	0.43%
Cartoon	0.37%
Game Show	0.37%
Nature	0.35%
Science and Technology	0.34%
Education	0.34%
Talk Show	0.34%
Travel	0.34%
Fantasy	0.30%
N/A	0.28%
Film -Noir	0.24%
Variety	0.24%
Historical	0.17%
Foreign	0.12%
Soap Opera	0.07%
Business and Finance	0.05%
Parliament	0.05%
Weather	0.05%
Shopping	0.03%
Infotainment	0.01%
Adult	0.01%
Suspense	0.00%

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