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Tourism Victoria F1 Australian Grand Prix

Comparative Broadcast Analysis
2008 – 2009

Version 4

September 2009



Europe - North America - Asia Pacific - Africa



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1.0 INTRODUCTION

Comperio Research has been commissioned by Tourism Victoria, the Victorian State Government statutory authority responsible for the development and promotion of tourism in Greater Victoria, to provide an in-depth comparative report on television broadcast distribution (to include hours of coverage, cumulative audience, brand exposure and media valuations) of the 2008 and 2009 Formula One Australian Grand Prix.

The primary objective of the report is to compare the 2008 and 2009 results, and further to ascertain from the live race component what, if any, effect the change to the main race time has had. The secondary objective of the report is to provide an in-depth analysis on television broadcast distribution of the 2009 race.

The report covers Tourism Victoria's Tier 1, 2 and 3 markets¹ and global coverage. The markets are defined as:

Tier 1: China, New Zealand, United Kingdom, USA

Tier 2: Canada, Germany, Hong Kong, India, Japan, Malaysia, Singapore, South Korea

Tier 3: Denmark, Finland, France, Iceland, Indonesia, Italy, Netherlands, Norway, Sweden, Switzerland, Taiwan, Thailand

Global coverage from 82 countries, which includes Tier 1, Tier 2 and Tier 3 territories, has also been analysed.

The sponsors monitored for brand exposure - visual sightings and verbal mentions - are the host city and state of the Grand Prix, "Melbourne" and "Victoria" respectively. The media valuation does not include internet, radio, print (magazines and newspapers) or outdoor exposure.

Comperio Research monitored a sample of 43 hours of dedicated coverage of the Australian Grand Prix, the opening round of the FIA Formula One World Championship from Tier 1, Tier 2 and Tier 3 territories. The exposure from the monitored sample was extrapolated across the total coverage of the tiered territories and the global coverage, thus providing accurate exposure data for analysis.

Official television audience ratings have been obtained where possible. Otherwise, audience ratings for unmeasured channels have been estimated based on similar channels and countries.

¹ Tourism Victoria's Tier markets have altered from 2008 – see section 2, 'Notes on the Report' for details on the changes and how comparisons with 2008 will be made throughout the report.

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Comperio Research sourced advertising unit costs that are specific to the programming in question, i.e. the 2009 Formula One Australian Grand Prix. These costs are taken from ratecards and therefore do not take into account any discount that media agencies or advertisers may receive due to volume buying.

2.0 NOTES ON THE REPORT

In the 2008 broadcast and exposure report, Tourism Victoria's key markets were defined as follows:

Tier 1:	China, New Zealand, United Kingdom, USA and Japan.
Tier 2:	Singapore, Malaysia, Germany, Korea, India, Hong Kong, Canada and Gulf Countries.

In 2009, these key markets were changed to the following:

Tier 1:	China, New Zealand, United Kingdom, and USA.
Tier 2:	Japan, Singapore, Malaysia, Germany, Korea, India, Hong Kong and Canada.
Tier 3:	France, Italy, Netherlands, Switzerland, Nordic*, Indonesia, Taiwan and Thailand.

* Where Nordic is: Sweden, Denmark, Finland, Norway, Iceland and Greenland

Due to the changes in the key markets (i.e. the removal of Japan to Tier 2, exclusion of the Gulf countries and the addition of the Tier 3 markets), true year-on-year comparisons are difficult to make and therefore throughout the report, adjustments have been made to the Tier groupings in order to analyse the results on a tier-by-tier basis.

For example, in 2008, Japan was included in the Tier 1 group however, in 2009 it is now considered a Tier 2 country. Therefore for analytical purposes, Japan has been moved from the 2008 Tier 1 group into the Tier 2 group. In addition, the Gulf Countries have been removed from the Tier 2 group when making year-on-year comparisons.

3.0 GLOSSARY

Brand Exposure: Visual sightings and verbal mentions of the sponsors' brand. Exposure is measured by two categories:

- » Frequency - the number of times a brand is seen or heard
- » Durations - the length of time in seconds a brand is seen or heard

Channel: The identity of a single TV service transmitting programmes.

Country: The geographical area of a sovereign state or administered territory.

Coverage: The sum of the durations of each individual broadcast.

Cumulative Audience: The sum of the average audiences of each individual broadcast.

Dedicated Coverage: Coverage from television programmes devoted wholly to the event such as live, delayed, repeat and highlights coverage, as opposed to magazine shows and news clips.

Diffusion: The method of how TV channels are transmitted, i.e. analogue terrestrial, digital terrestrial, cable and satellite.

Duration: The length of time of the broadcast.

Gross Media Value: The advertising value equivalent to the total exposure.

Household Reach: The number of households in a given population able to receive a channel.

Magazine and News Coverage: Coverage from television programmes that presents a variety of topics, usually on current events. Therefore, magazine and news coverage is not classified as dedicated coverage as the footage of the Australian Grand Prix is only a component of the television programme.

Market Share: The percentage of the total viewing audience tuned in to a particular programme or channel in a defined period.

Net Media Value: Discounted gross media value based on the quality of the exposure to provide a more accurate reflection of value derived from the sponsorship.

Potential Audience: The number of households that can receive a signal transmitted from a channel.

Programme Audience: Average audience throughout the broadcast.

Region: Five geographical areas of the Earth - the five regions as categorised in this report are: Africa and Middle East, Asia Pacific, Central and South America, Europe, and North America.

Television Rating (TVR): The percentage of a given population group tuned in to a particular programme or channel in a defined period.

4.0 METHODOLOGY

4.1 Measuring Television Audiences

Broadcast information and audience ratings are sourced from broadcasters and television audience measurement (TAM) services. The broadcast information includes channel, dates, start time, end time, duration and type of programming such as live, delayed, repeat and highlights. The audience ratings include television rating, programme audience and market share for all individuals.

Programme Audience, also known as Average Audience, is the most commonly used measure of broadcast penetration. It is the average of all the minute audiences covered by the programme transmission. For this report, Programme Audience has been expressed in people (individuals) terms.

Programme Audience can also be expressed as a % which is known as a Television Rating (TVR). A TVR is the measure of the popularity of a programme, by comparing its audience to the Universe Estimate - the total population of a particular audience category - in this case all individuals.

For example, suppose a programme has a TVR of 2.5% for Individuals and the Universe Estimate for Individuals is 100,000, its programme audience would be calculated using the following formula:

Programme Audience

Programme Audience = Television Rating (%) x Universe Estimate

Example

Television Rating = 2.5%

Universe Estimate = 100,000

$2.5\% \times 100,000$

Programme Audience = 2,500 Individuals

4.2 Measuring Brand Exposure

Comperio Research monitored a sample of 43 hours of dedicated coverage of the 2009 Australian Grand Prix, the opening round of the FIA Formula One World Championship from Tier 1, Tier 2 and Tier 3 territories. The monitored coverage is detailed in Figure 1 below.

Figure 1: Monitored Dedicated Coverage

Country	Broadcaster	Event Date	Type of Coverage	Duration (hh:mm)
UK	BBC	27/03/2009	Practice	02:08:05
UK	BBC	28/03/2009	Qualifying	02:16:24
UK	BBC	29/03/2009	Race	03:00:22
UK	BBC	29/03/2009	Highlights	00:57:17
Pan Asia	ESPN Star Sports	28/03/2009	Qualifying	01:56:20
Pan Asia	ESPN Star Sports	28/03/2009	Race	03:30:32
Canada	TSN	28/03/2009	Qualifying	01:00:15
Canada	TSN	29/03/2009	Preview	00:27:58
Canada	TSN	29/03/2009	Race	01:59:31
Japan	Fuji TV	27/03/2009	Practice 1	01:42:04
Japan	Fuji TV	27/03/2009	Practice 2	01:41:04
Japan	Fuji TV	27/03/2009	Practice 3	01:12:04
Japan	Fuji TV	28/03/2009	Qualifying	01:32:05
Japan	Fuji TV	29/03/2009	Race	02:23:30
Pan Europe	Eurosport	27/03/2009	Practice 1	01:34:38
Pan Europe	Eurosport	27/03/2009	Practice 2	01:34:07
Pan Europe	Eurosport	27/03/2009	Practice 3	01:04:59
Pan Europe	Eurosport	28/03/2009	Qualifying	01:07:57
France	TF1	29/03/2009	Race	02:01:56
Germany	DSF	27/03/2009	Practice	01:35:03
Germany	RTL	27/03/2009	Practice	00:57:53
Germany	RTL	28/03/2009	Qualifying	01:51:03
Germany	DSF	28/03/2009	Qualifying	01:34:22
Germany	RTL	29/03/2009	Countdown	01:00:41
Germany	RTL	29/03/2009	Race	01:47:45
Germany	RTL	29/03/2009	Review	00:54:23
Germany	RTL	29/03/2009	Preview	00:14:14
Total				43:06:32

The coverage was monitored for exposure from signage, on-screen graphics, and verbal mentions of “Melbourne” and “Victoria” branding. There are two requirements for visual sightings of a sponsor’s brand to be measured as exposure:

- » At least two-thirds (67%) of the branding must be clearly visible
- » The branding must be in focus and clearly legible for at least one second

If two or more visible sources of exposure for the same sponsor are shown on screen simultaneously, then all sources are taken into consideration.

4.3 Extrapolating Brand Exposure

As it is not possible to monitor all coverage of the event to measure brand exposure, the monitored coverage is extrapolated from the 43 hours sample across total broadcast hours. This is calculated using the following process:

- » Monitoring sample of coverage by source and type of coverage (live / delayed / highlights etc)
- » Establishing exposure per hour by source and type of coverage (live / delayed / highlights etc)
- » Extrapolating exposure per hour across total broadcast hours

e.g. If, through the monitoring process, it is calculated that Melbourne receives 10 seconds per hour of coverage from on-screen graphics and there is 100 hours of coverage, in total it is calculated that Melbourne would receive 10 seconds in each of the 100 hours = 1,000 seconds in total.

4.4 Measuring Verbal Mentions

Verbal mentions were monitored for positive, neutral and negative associations for the brand:

- » Positive: Favourable reference to the brand, i.e. “Melbourne is great, beautiful city”
- » Neutral: Of no particular kind of reference to the brand, i.e. “Welcome back to Melbourne”
- » Negative: Unfavourable to the brand, i.e. “It always rains in Melbourne”

As per industry standard, verbal mentions are valued based on the equivalent of 10 seconds of brand exposure. However to provide a more accurate reflection of value derived from the sponsorship, the following rules have been applied to verbal mentions:

- » Positive verbal mentions are not discounted as they are considered of equal value when compared to traditional advertising
- » Neutral verbal mentions are discounted by 50%
- » Negative verbal mentions are discounted by 90%

The measured exposure from the monitored sample is then extrapolated across the total coverage of the Tier 1, Tier 2 and Tier 3 territories and the Global Sample, thus providing accurate exposure data for analysis and calculating media values.

4.5 Calculating Media Value

4.5.1 Gross Media Value from Brand Exposure

Gross Media Value provides a financial value on the level of brand exposure generated from television coverage of an event. It is based on the equivalent advertising value the level of exposure would generate.

To calculate Gross Media Value for brand exposure the following formula is used:

$$\frac{\text{Seconds of Exposure}}{30} \times \text{30-Second Commercial Rate of Broadcaster}$$

In order to produce accurate and relevant valuations, Comperio sourced advertising unit costs that are specific to the programming in question.

Example:

Brand Exposure = 45 seconds

30-Second Commercial Rate of Broadcaster = AU\$100

Gross Media Value calculation = $45 / 30 \times 100$

Gross Media Value = AU\$150

As per industry standard, verbal mentions are valued based on the equivalent of 10 seconds of brand exposure.

4.5.2 Net Media Value from Brand Exposure

A 30-second TV commercial contains a message and is focused on a brand advertising a product, whereas a sponsor's image typically will appear on screen intermittently and for durations of one or more seconds, and do not carry the brand or product message that commercials can. Therefore, in addition to the advertising equivalent or gross media value, a net media value is calculated to discount the value derived from the sponsorship when compared to traditional TV advertising.

For the purposes of this report, Gross Media Values, excluding positive and neutral verbal mentions, are discounted by 90% to provide a more accurate reflection of value derived from the sponsorship. This discounted figure is the Net Media Value. The 90% weighting is an average discount figure used by Comperio Research based on the level of Brand Impact Score monitoring.

Brand Impact Scores evaluate the quality of the exposure by measuring the size of the branding and the number of brands present on-screen. Sponsorship theory suggests that the best outcome for the brand would be to be the only brand visible on the screen and for the brand to take up as greater proportion of the screen as possible – thereby attracting the viewer's attention to the brand without the 'clutter' of other brands in that space. This is deemed to have greater impact than if the brand was one of many brands visible and only take up a small portion of the screen.

For example, in the pictures below, the Melbourne branding in the picture on the right is considered to have more impact on the viewer than that on the left, as 'Melbourne' appears larger on-screen and is the only brand on screen.



Less impact by the brand due to a number of other brands on screen and small size of brand exposure



More impact on the viewer due to only one brand on screen and larger size of brand exposure

Net media value is calculated as follows:

Example:

Total Coverage = 750,000 seconds

30-Second Commercial Rate of Broadcaster = AU\$100

Gross Media Value calculation = $750,000 / 30 \times 100$

Gross Media Value = AU\$2,500,000

Net Media Value calculation = $2,500,000 \times 0.10$

Net Media Value = AU\$250,000

Verbal mentions were monitored for positive, neutral and negative associations for the brand. As per industry standard, verbal mentions are valued based on the equivalent of 10 seconds of brand exposure. However to provide a more accurate reflection of value derived from the sponsorship, the following rules have been applied to verbal mentions:

- » Positive verbal mentions are not discounted as they are considered of equal value when compared to traditional advertising
- » Neutral verbal mentions are discounted by 50%
- » Negative verbal mentions are discounted by 90%

4.5.3 Gross Media Value from Total Coverage

Gross media value has been estimated using the same calculation as gross media value of brand exposure, but it has been assumed that all coverage has generated media value, not only that coverage which features Melbourne or Victoria.

Therefore each second of coverage on each broadcaster has been deemed to generate the advertising equivalent value.

Example:

Total coverage = 2 hours (120 mins – the equivalent to 240 30- second commercial spots)

30-Second Commercial Rate of Broadcaster = AU\$100

Gross Media Value calculation = 240 (30-second commercial spots) x 100

Gross Media Value = AU\$24,000

4.5.4 Net Media Value from Total Coverage

Net Media value for total coverage has been calculated in the same way as net media value for brand exposure, i.e. all exposure has been discounted by 90%.

5.0 EXECUTIVE SUMMARY

Global coverage covering 35 territories (82 countries) broadcast 444 hours and 20 minutes of coverage, including dedicated coverage from all territories, and magazine and news coverage from Tier 1, Tier 2 and Tier 3 territories only. The global coverage attracted a cumulative television audience of 270.7 million.

From this coverage, Melbourne received 116,085 seconds (32 hours and 14 minutes) of brand exposure. The exposure returned a gross media value of AU\$355.9 million and a net media value of AU\$35.6 million.

Figure 2: Gross and Net Media Value based on Total Coverage by Global Sample

Number of Territories	Number of Countries	Total Coverage (hh:mm)	Gross Media Value of Total Coverage (AU\$)	Net Media Value of Total Coverage (AU\$)
35	82	444:20	355,943,054	35,594,305

Initial results from 2009 suggest that the change in broadcast time has positively impacted the audiences in Europe, although further research in 2010 would be required to see if the upward trend was maintained. However, this decision appears to have had a detrimental effect on audiences in Asia Pacific and North America.

The table below shows that in terms of cumulative audience, audiences rose significantly in Central & South America and Europe (by 120%), whilst audiences fell by 74% in Asia Pacific and 50% in North America.

Figure 3: Regional Cumulative Audience – Race Coverage Only

Region / Territory	Cumulative Audience 2008	Cumulative Audience 2009	Change 2008-2009	% Change 2008-2009
Asia Pacific	8,770,271	5,044,596	-3,725,675	-74%
Central and South America	14,453	65,160	50,707	351%
Europe	6,838,089	15,058,663	8,220,574	120%
North America	472,000	314,700	-157,300	-50%
Total	16,094,812	20,483,119	4,388,307	27%

Note: Where audiences were not available in either one of 2008 or 2009 audiences have been listed as zero

A comparison of exposure per sighting and exposure per hour highlights fundamental changes in the exposure and media value year-on-year:

- » Overall exposure per hour for Melbourne decreased by over 25 seconds per hour of coverage with graphics, the overtrack banner and the podium backdrop all registered decreases of over 10 seconds per hour of coverage.
- » The decrease in exposure per hour was partially offset by an increase of 1.9 seconds in each sighting of the Melbourne brand.
- » Exposure from local area scenics increased by 9.4 seconds per sighting and 5.3 seconds per hour of coverage, indicating that track signage did not generate as much exposure as in 2008 and therefore should be the focus of improvements for the 2010 race.

Total coverage and cumulative audience increased across Tier 1 and 2 markets by 9% and 10% respectively. Coverage rose by over 14 hours, whilst audience rose by just under 14 mil. people. In Tier 1, coverage fell by 6% to 39.5 hours, but cumulative audience rose by 16%, due to a significant increase in the UK where cumulative audience rose by 136%, thanks to Jenson Button's win and the change in broadcast time. Coverage in the UK also rose by 58% to just under 14.5 hours.

Both coverage and audience rose in Tier 2 markets, by 16 hours and 45 mins and 4.3 mil. respectively. All Tier 2 markets with the exception of Japan increased their coverage in 2009 compared to 2008.

Figure 4: Total Coverage Comparison - Tier 1 & 2 Markets

Territory	Total Coverage (hh:mm)		Total Cumulative Audience		Coverage Change (%)	Audience Change (%)
	2008	2009	2008	2009		
Tier 1						
China	04:39	04:28	55,268,213	59,576,000	-4%	8%
New Zealand	17:56	12:56	103,431	135,744	-39%	31%
United Kingdom	09:09	14:25	4,440,484	10,497,940	58%	136%
USA	10:12	07:39	1,614,500	932,000	-33%	-42%
Tier 1 Total	41:57	39:29	61,426,628	71,141,684	-6%	16%
Tier 2						
Canada	12:43	13:58	652,579	1,065,521	10%	63%
Germany	20:56	21:01	67,892,169	72,276,963	0%	6%
Hong Kong	15:13	18:22	190,210	160,650	21%	-16%
India	13:32	20:40	202,126	895,000	53%	343%
Japan	02:54	02:35	4,598,712	3,099,132	-13%	-33%
Malaysia	20:58	22:51	1,384,646	1,424,771	9%	3%
Singapore	17:52	21:12	111,748	347,217	19%	211%
South Korea	05:00	05:15	18,493	50,300	5%	172%
Tier 2 Total	109:11	125:57	75,050,683	79,319,554	15%	6%
Grand Total	151:09	165:26	136,477,311	150,461,238	9%	10%

Note: Japan is included in the Tier 1 analysis; Pan Middle East has been removed from the Tier 2 analysis

Figure 5: 2009 Australian Grand Prix Measurement Summary

Territory	Number of Broadcasts	Total Coverage (hh:mm)	Cumulative Audience	Gross Media Value of Total Coverage (AU\$)	Net Media Value of Total Coverage (AU\$)	Brand Exposure (secs)	Gross Media Value of Brand Exposure (AU\$)	Net Media Value of Brand Exposure (AU\$)
Tier 1¹								
China	48	04:28	59,576,000	7,249,714	724,971	1,050	393,049	112,192
New Zealand	12	12:56	135,744	1,062,701	106,270	2,246	51,489	13,919
United Kingdom	24	14:25	10,497,940	25,555,285	2,555,529	2,767	1,358,953	367,435
USA	5	07:39	932,000	13,079,664	1,307,966	1,498	711,397	192,301
Tier 1 Total	89	39:29	71,141,684	46,947,364	4,694,736	7,561	2,514,889	685,847
Tier 2¹								
Canada	23	13:58	1,065,521	3,865,497	386,550	2,205	232,137	84,154
Germany	140	21:01	72,276,963	94,406,287	9,440,629	2,739	3,643,520	1,184,249
Hong Kong	25	18:22	160,650	7,956,965	795,696	8,677	1,060,398	286,394
India	18	20:40	895,000	6,400,030	640,003	9,839	848,627	221,790
Japan	2	02:35	3,099,132	26,726,030	2,672,603	276	792,813	209,442
Malaysia	57	22:51	1,424,771	8,301,417	830,142	9,611	1,054,804	278,142
Singapore	87	21:12	347,217	8,145,440	814,544	9,297	1,046,668	279,529
South Korea	4	05:15	50,300	1,369,309	136,931	971	70,186	19,015
Tier 2 Total	356	125:57	79,319,554	157,170,975	15,717,097	43,613	8,749,152	2,562,716
Tier 3¹								
Denmark	12	19:30	149,365	10,262,534	1,026,253	2,936	555,272	150,343
France	62	04:18	36,689,802	9,207,467	920,747	1,039	484,004	175,307
Italy	71	04:33	64,933,202	29,820,994	2,982,099	1,171	1,850,019	591,773
Netherlands	11	07:52	2,212,208	1,423,477	142,348	1,479	74,294	21,180
Norway	15	21:35	81,215	2,282,062	228,206	4,297	132,400	37,529
Sweden	12	18:59	234,398	2,167,338	216,734	3,636	113,643	30,211
Tier 3 Total	183	76:49	104,300,188	55,163,872	5,516,387	14,558	3,209,631	1,006,344
Other²								
Argentina	6	10:00	410,010	3,346,800	334,680	1,912	177,750	47,873
Austria	5	08:08	401,000	4,350,509	435,051	1,544	221,174	59,360
Belgium	5	07:20	488,265	1,938,333	193,833	1,428	103,728	28,039
Brazil	7	07:28	711,859	1,183,616	118,362	1,446	63,669	16,858
Czech Republic	3	02:38	1,274,000	2,608,282	260,828	444	134,081	36,414
Hungary	4	08:42	2,169,700	10,015,809	1,001,581	1,631	535,713	144,442
Pan Africa ³	10	17:50	49,877	1,351,987	135,199	3,602	77,572	20,829
Romania	3	04:09	624,100	2,557,006	255,701	740	126,513	33,961
Russia	5	08:42	955,400	1,555,627	155,563	1,685	83,398	22,494
South Africa	9	17:50	181,050	1,365,582	136,558	3,572	76,057	20,582
Spain	8	18:07	4,008,222	11,239,997	1,124,000	3,512	627,563	170,282
Other Total	65	110:56	11,273,483	41,513,547	4,151,355	21,515	2,227,218	601,133
Grand Total	693	353:12	266,034,910	300,795,757	30,079,576	87,247	16,700,891	4,856,041

¹ Dedicated coverage and magazine and news coverage

² Dedicated coverage only

³ Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Congo, Congo DR, Côte d'Ivoire, Djibouti, Equatorial Guinea, Eritrea, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Liberia, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mayotte, Mozambique, Namibia, Niger, Nigeria, Réunion, Rwanda, Saint Helena, Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, South Africa, Sudan, Swaziland, Tanzania, Togo, Uganda, Zambia, Zimbabwe

Notes: Japan is included in Tier 2; Finland, Iceland, Indonesia, Switzerland, Taiwan and Thailand removed from Tier 3

Figure 6: 2008 Australian Grand Prix Measurement Summary

Territory	Number of Broadcasts	Total Coverage (hh:mm)	Cumulative Audience	Gross Media Value of Total Coverage (AU\$)	Net Media Value of Total Coverage (AU\$)	Brand Exposure (secs)	Gross Media Value of Brand Exposure (AU\$)	Net Media Value of Brand Exposure (AU\$)
Tier 1²								
China	46	04:39	55,268,213	9,948,736	994,874	685	406,509	103,065
New Zealand	15	17:56	103,431	1,410,717	141,072	3,906	85,271	28,824
United Kingdom	26	09:09	4,440,484	8,729,280	872,928	2,001	529,496	194,352
USA	8	10:12	1,614,500	16,689,342	1,668,934	2,504	1,137,834	362,496
Tier 1 Total	95	41:57	61,426,628	36,778,075	3,677,808	9,096	2,159,110	688,737
Tier 2²								
Canada	9	12:43	652,579	2,926,868	292,687	3,133	199,781	63,665
Germany	52	20:56	67,892,169	38,053,553	3,805,355	3,434	2,252,748	609,598
Hong Kong	27	15:13	190,210	16,473,617	1,647,362	4,311	401,354	85,051
India	10	13:32	202,126	4,578,460	457,846	2,860	267,732	59,736
Japan	13	02:54	33,489,712	27,025,270	2,702,527	381	1,053,192	264,152
Malaysia	53	20:58	1,384,646	8,710,474	871,047	5,906	554,584	118,539
Singapore	25	17:52	111,748	6,016,172	601,617	5,051	468,129	99,259
South Korea	3	05:00	18,493	1,267,734	126,773	1,230	85,508	27,258
Tier 2 Total	192	109:11	103,941,683	105,052,147	10,505,215	26,305	5,283,029	1,327,259
Tier 3								
Denmark	18	21:17	395,140	8,235,227	823,523	4,645	498,963	184,477
France	3	04:57	2,720,640	3,259,207	325,921	1,082	197,472	73,009
Italy	6	05:24	3,525,759	7,181,027	718,103	1,180	435,091	160,862
Netherlands	8	09:07	1,742,000	1,498,251	149,825	1,992	90,777	33,562
Norway	1	02:06	3,000	1,114,651	111,465	458	67,535	24,969
Sweden	3	05:59	138,000	1,988,647	198,865	1,309	120,490	44,547
Tier 3 Total	39	48:53	8,524,539	23,277,012	2,327,701	10,665	1,410,329	521,426
Other								
Argentina	4	06:00	192,549	1,931,202	193,120	1,309	117,009	43,261
Austria	6	09:28	441,000	5,276,842	527,684	2,067	319,718	118,206
Belgium	6	09:32	253,919	2,770,501	277,050	2,082	167,862	62,062
Brazil	3	03:46	178,291	574,215	57,421	822	34,791	12,863
Czech Republic	4	02:36	873,000	1,651,934	165,193	570	100,089	37,005
Hungary	4	07:01	2,078,000	5,559,289	555,929	1,533	336,831	124,533
Pan Africa ⁴	10	18:20	17,719	1,137,157	113,716	3,999	68,899	25,473
Romania	4	06:17	655,000	3,723,565	372,356	1,373	225,607	83,411
Russia	2	03:25	476,190	1,011,133	101,113	746	61,263	22,650
South Africa	10	18:20	323,280	1,137,157	113,716	3,999	68,899	25,473
Spain	8	17:54	5,928,736	8,986,652	898,665	3,907	544,491	201,309
Other Total	61	102:43	11,417,684	33,759,645	3,375,965	22,406	2,045,460	756,247
Grand Total	387	302:46	185,310,534	198,866,880	19,886,688	68,472	10,897,927	3,293,669

¹ Dedicated coverage only.

² Dedicated Coverage and Magazine and News Coverage.

³ Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Central African Republic, Chad, Comoros, Congo, Cote D' Ivoire, Democratic Republic of Congo, Djibouti, Equatorial Guinea, Eritrea, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mayotte, Mozambique, Namibia, Niger, Nigeria, Republic of Cape Verde, Reunion, Rwanda, Saint Helena, Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, Somalia, Sudan, Swaziland, Tanzania, Togo, Uganda, Zambia, Zanzibar, Zimbabwe.

Notes: Pan Middle East removed from Tier 2; Denmark, France, Italy, Netherlands, Norway and Sweden moved to Tier 3

6.0 AUSTRALIAN GRAND PRIX COMPARISON 2008 - 2009

6.1 Introduction

In July 2008, it was announced that the Victorian Government had signed a new contract with Formula One Management, the commercial rights holder of the sport of Formula One racing, securing the Grand Prix in Melbourne until at least 2015.

At this time it was also announced that the 2009 main race for the Australian Formula One Grand Prix would begin at 17:00 local time. This decision was based around the belief that this, in conjunction with the provisional race date of the last weekend in March (where there is a reduced time difference between Australia and Europe due to daylight savings), would significantly enhance potential international broadcast audience numbers which in turn could increase the net and gross broadcast value this would provide for Melbourne, Victoria.

This section of the report makes a selection of relevant comparisons with the 2008 race, firstly across race coverage in all comparable markets and then with further detail on Tier 1 and Tier 2 markets. As mentioned in the 'Notes on the Report' section, adjustments have been made to the Tier groupings to enable relevant comparisons to be made.

6.2 Race Coverage Comparison 2008-2009

In 2009, a decision was made by the race organisers and Formula One Management's to start the Australian Grand Prix in a later timeslot for the benefit of European audiences – in 2009 the race started at 5pm AEST compared to 3.30pm in 2008. This corresponded to the 2009 race starting at 8am Central European Time (CET) in contrast to 5.30am CET last year. This section of the report has analysed the change in audiences for the race coverage only, to assess what impact, if any, the change in start time had on audiences across the world.

It should be noted that further analysis in 2010 and onwards would be required to see if any changes develop into trends – it may be that in some markets, driver success (or otherwise) or other variables may impact on audience levels. For example in the UK, the success of Lewis Hamilton in 2008 and the performance of Jenson Button on pole, would have driven anticipation for the first race of the season. Similarly, five German drivers featured in the race, with three (Kettel, Rosberg and Heidfeld) in the top 10 on the grid.

Initial results from 2009 suggest that the change in broadcast time has positively impacted the audiences in Europe, although further research in 2010 would be required to see if the upward trend was maintained. However, this decision appears to have had a detrimental effect on audiences in Asia Pacific and North America.

The table below shows that in terms of cumulative audience, audiences rose significantly in Central & South America² and Europe (by 120%), whilst audiences fell by 74% in Asia Pacific and 50% in North America.

Figure 7: Regional Cumulative Audience – Race Coverage Only

Region / Territory	Cumulative Audience 2008	Cumulative Audience 2009	Change 2008- 2009	% Change 2008 - 2009
Asia Pacific	8,770,271	5,044,596	-3,725,675	-74%
Central and South America	14,453	65,160	50,707	351%
Europe	6,838,089	15,058,663	8,220,574	120%
North America	472,000	314,700	-157,300	-50%
Total	16,094,812	20,483,119	4,388,307	27%

Note: Where audiences were not available in either one of 2008 or 2009 audiences have been listed as zero

However, the later start in Melbourne appears to have had a negative effect on television ratings across the Asian continent. On top of China's fall in ratings, India, Indonesia and Malaysia all experienced a decline in viewing figures. These results were perhaps surprising considering a later start time was expected to increase television audiences not only in Europe, but also in Asia.

It is unclear as to why audiences should decrease almost unilaterally in Asia, but one possible reason could be that the later start coincided with family activities around lunchtime, whereas the earlier morning start time in previous years enabled F1 viewers to watch the race and take part in these activities as well.

In North America, the later start time pushed coverage into the early hours of the morning which seems to have had a negative impact on audience levels. For example in the US, the 2009 race programme began at 2am Eastern Daylight Time (EDT), compared to the live programme shown between 12am and 2.30am EDT in 2008.

² Coverage in Central & South America refers to Brazil only. The Brazilian driver Rubens Barrichello qualified and finished in 2nd place and Felipe Massa, driving for Ferrari qualified in 6th place, which may explain the increase in this market despite having a similar start time to that of North America.

The key findings include:

- » In Tier 1 territory the United Kingdom, BBC1's live coverage of the first race of the 2009 Formula One season, which ran from 6am to 9am, attracted an average of 2.1 million viewers. This represents an increase of 156% from 832,600 viewers on ITV1 in 2008. This is due to a later start time in Melbourne, the return of Formula One to BBC1 (the most popular television channel by audience share), and the heightened interest created by Lewis Hamilton's strong performance in gaining an inaugural Formula One drivers crown last season.
- » Within Tier 2, German commercial broadcaster RTL drew 3.66 mil. viewers for its live coverage of the Australian Grand Prix which started at 8am. The audience was 125% higher than that for the race last season, which attracted an average audience of 1.62 million.
- » In Tier 3, Italian public service broadcaster Rai Uno attracted an average audience of just under 4.0 million, the highest audience for all markets, for its live coverage of the Australian Grand Prix at 8am. This figure represented an increase of 154% on the 2008 audience of 1.6 million. The audience increase is partly due to the new start time and reaffirms Italy as the leading European market for Formula One.
- » French commercial broadcaster TF1 drew an average audience of 2.1 million viewers for its live race coverage. The audience was three times the size that was secured for the race last season, which attracted an average audience of 680,160. This can be attributed to the more convenient start time of 8am and the re-emergence of Renault, which has raised interest in Formula One in France during recent years.
- » Spanish commercial broadcaster La Sexta drew 1.68 mil. viewers for its debut live coverage of Formula One. La Sexta acquired Formula 1 rights from incumbent broadcaster T5, which attracted an average audience of 1.1 mil. last year. This represented an increase of 20%.
- » All three Swiss linguistic territories secured improved viewing ratings for their live coverage, with French-language broadcaster TSR1 experiencing an increase of 399%.
- » Chinese state broadcaster CCTV5 attracted 2.4 million viewers for its live coverage of the Grand Prix from Melbourne at 2pm. The audience was down over 100% on last year's figure of 5.1 million which was achieved with a start time of 12.30pm.
- » Taiwan was the only Asian territory to experience increased audience ratings, by 8%. Cable and satellite sports network STAR Sports pulled in 71,000 viewers for the live action this year, compared to 66,000 last year.

- » In the USA, cable and satellite broadcaster Speed drew an average audience of 166,000 for its live coverage of the race, beginning at 2am Eastern Daylight Time (EDT). This represented a fall of 46% compared to 2008 when Speed's live programme, shown between 12am and 2.30am EDT, attracted an average audience of 307,000.
- » Canadian cable and satellite sports broadcaster TSN pulled in an average audience of 105,700 viewers for its live coverage at 2am EDT. This represents a decline of 14% from 123,000 viewers in 2008.

Figure 8: Race Coverage – Average Audience Comparison by Tier

Territory	Broadcaster	Start Time	2008	Broadcaster	Start Time	2009	% Audience Change
			Average Audience			Average Audience	
Tier 1							
China	CCTV5	12:25:00	5,125,725	CCTV5	13:52:05	2,360,000	-54%
New Zealand	SKY Sport 3	Not Measured		SKY Sport 1	18:55:10	67,200	-
United Kingdom	ITV1	03:28:40	832,600	BBC1	06:00:00	2,133,000	156%
USA	Speed	00:00:00	307,000	Speed	01:30:00	166,000	-46%
Tier 2							
Canada	TSN	00:00:00	123,000	TSN+	01:55:00	105,700	-14%
Canada - Quebec	RDS	13:00:00	42,000	RDS	04:00:00	43,000	2%
Germany	RTL	05:33:35	1,626,051	RTL	08:03:30	3,661,252	125%
Hong Kong	STAR SPORTS	Not Measured		STAR SPORTS	Not Measured		-
India	STAR SPORTS	09:55:00	72,188	STAR SPORTS	10:29:00	61,000	-15%
Japan	Fuji TV	16:00:00	2,599,272	Fuji TV	16:00:00	1,799,496	-31%
Malaysia	STAR SPORTS	12:15:00	167,881	STAR SPORTS	13:00:00	107,000	-36%
	RTM1	13:59:55	245,756	NTV7	13:49:51	235,000	-4%
Singapore	STAR SPORTS	Not Measured		STAR SPORTS	Not Measured		-
South Korea	MBC ESPN	17:00:00	15,449	MBC ESPN	17:03:25	13,900	-10%
Tier 3							
Denmark	TV2	05:25:49	71,930	TV3 PULS	07:01:21	44,000	-39%
Finland	MTV3 Max	Not Measured		MTV3 Max	Not Measured		-
France	TF1	05:26:49	680,160	TF1	07:56:28	2,072,700	205%
Iceland	Stöð 2 Sport	04:00:00	2,000	Stöð 2 Sport	05:30:00	4,000	100%
Indonesia	GTV	11:23:00	478,000	GTV	13:01:00	330,000	-31%
Italy	Rai Uno	05:25:03	1,565,981	Rai Uno	07:55:02	3,977,700	154%
Netherlands	RTL7	05:26:00	189,000	RTL7	07:54:00	363,200	92%
Norway	TV3 NO	05:15:00	3,000	Viasat Sport	Not Measured		-
Sweden	TV6 SE	05:15:00	63,000	Viasat Motor	Not Measured		-
Switzerland - French Speak	TSR1	05:33:34	10,400	TSR1	08:03:33	51,900	399%
Switzerland - German Spea	SF zwei	05:33:35	71,600	SF zwei	08:03:33	187,100	161%
Switzerland - Italian Speakin	TSI2 / RSI LA2	05:33:35	5,800	TSI2 / RSI LA2	08:03:33	12,000	107%
Taiwan	STAR SPORTS	12:16:00	66,000	STAR SPORTS	13:43:00	71,000	8%
Thailand	STAR SPORTS	Not Measured		STAR SPORTS	Not Measured		-
Other Markets							
Austria	ORF	04:29:00	46,000	ORF	06:59:00	96,000	109%
Belgium North	één	05:15:32	22,753	Canvas	07:44:01	78,639	246%
Belgium South	La Deux	05:03:21	33,688	La Deux	07:55:01	131,372	290%
Brazil	Sportv	22:43:00	14,453	Sportv	22:36:00	65,160	351%
Russia	REN TV	07:19:37	381,020	SPORT	09:45:30	375,800	-1%
Spain	T5	05:31:09	1,173,706	La Sexta	08:03:00	1,679,000	43%
	TV3	05:31:09	59,400	TV3	08:03:33	191,000	222%

Note: Where a broadcaster is not available on audited ratings panels, it has been listed as 'Not Measured'

6.3 Brand Exposure Comparison 2008-2009

A comparison of exposure per sighting and exposure per hour highlights fundamental changes in the exposure and media value year-on-year. Changes in either the duration of each sighting or the level of exposure per hour will lead to changes in total exposure and media value, and can therefore be considered the drivers of these changes. The key findings are:

- » Overall exposure per hour for Melbourne decreased by over 25 seconds per hour of coverage.
- » Graphics, the overtrack banner and the podium backdrop all registered decreases of over 10 seconds per hour of coverage.
- » The decrease in exposure per hour was partially offset by an increase of 1.9 seconds in each sighting of the Melbourne brand.
- » Exposure in local area scenics increased by 9.4 seconds per sighting and 5.3 seconds per hour of coverage, whilst verbal mentions also increased on a per hour basis, indicating that track signage did not generate as much exposure as in 2008 and therefore should be the focus of improvements for the 2010 race. However it should also be noted that signage exposure is difficult to control during live sport, particularly a fast moving sport such as F1 and therefore fluctuations in signage exposure should be expected,

Figure 9: Brand Exposure Comparison 2008-2009

Source	2009		2008		Change in Exposure / Sighting	Change in Exposure / Hour
	Brand Exposure / Sighting (secs)	Brand Exposure / Hour (secs)	Brand Exposure Per Sighting (secs)	Brand Exposure Per Hour (secs)		
Melbourne						
Graphics	16	34.6	17	48.1	-1.4	-13.5
Local Area Scenic	19	58.2	9	53.0	9.4	5.3
Other	3	0.3	4	2.4	-1.5	-2.2
Overtrack Banner	6	27.7	5	38.2	1.3	-10.5
Pits Banner	-	-	3	1.1	-	-
Podium Backdrop	4	9.0	6	19.7	-2.4	-10.7
Track Banner	4	0.7	-	-	-	-
Verbal Mentions	10	74.5	10	67.9	0.0	6.6
Melbourne Total	10	204.9	8	230.4	1.9	-25.5
Victoria						
Graphics	6	1.1	6	1.5	-0.3	-0.4
Other	2	0.2	3	0.1	-0.9	0.1
Verbal Mentions	10	2.8	10	2.2	0.0	0.6
Victoria Total	8	4.0	8	3.8	-0.3	0.2
Total	10	208.9	8	234.2	1.8	-25.3

6.4 30-Second Commercial Spot Rate Comparison 2008-2009

The TV advertising industry has been significantly affected by the global economic crisis. Each market will be different, but research from The Nielsen Company shows that Global advertising expenditures across television, newspapers, magazines and radio dropped 7.2% during the first quarter of 2009 against Q1 2008, according to their global advertising trends report released earlier this year. Within this overall reduction, TV advertising expenditure dropped by 5%.

The report shows that there has been a fundamental drop in advertising revenues that has affected all regions, but in particular the USA (-12.7%) and Europe (especially Spain (-28.2%), Ireland (-21.2%), Italy (-19.1%) and the UK (-14.7%). At the same time as the global recession, TV is undergoing increased competition particularly from online competitors who are taking away viewers from traditional broadcasters.

It is likely that an established, premium sports event like the Australian Grand Prix would be more robust than other sports or non-sports events. However, without detailed analysis of each market and a comparison of commercial rates and audiences across all genres of TV it is impossible to quantify accurately.

A top level analysis of the Tier 1 and 2 markets suggest that in some cases advertising rates have reduced from 2008-2009 which will impact on media values.

Figure 10: 30-Second Advertising Rate Comparison in Tier 1 & 2 Markets

Territory	2008 Average 30-second commercial Spot Cost (AU\$)	2009 Average 30-second commercial Spot Cost (AU\$)
Tier 1		
China	17,808	9,260
NZ	655	681
UK	7,361	12,982
USA	13,700	14,248
Tier 2		
Canada	1,918	1,995
Germany	19,681	20,881
Hong Kong	2,817	4,195
India	2,817	1,712
Japan	82,897	43,107
Malaysia	2,817	4,195
Singapore	2,817	4,195
South Korea	2,085	2,168

6.5 Tier 1 & 2 Comparison – Total Coverage

6.5.1 Total Coverage Hours of Coverage & Audience Analysis

Total coverage and cumulative audience increased across Tier 1 and 2 markets in 2009, by 9% and 10% respectively. Coverage rose by over 14 hours, whilst audience rose by just under 14 mil.

In Tier 1, coverage fell by 6% to 39.5 hours, but cumulative audience rose by 16%, due to a significant increase in the UK where cumulative audience rose by 136%, thanks to Jenson Button's win and the change in broadcast time. Coverage in the UK also rose by 58% to just under 14.5 hours.

Both coverage and audience rose in Tier 2 markets, by 16 hours and 45 mins and 4.3 mil. respectively. All Tier 2 markets with the exception of Japan increased their coverage in 2009 compared to 2008, with Indian coverage contributing over 7 hours to the overall increase and Hong Kong and Singapore over 3 hours each.

Figure 11: Total Coverage Comparison - Tier 1 & 2 Markets

Territory	Total Coverage (hh:mm)		Total Cumulative Audience		Coverage Change (%)	Audience Change (%)
	2008	2009	2008	2009		
Tier 1						
China	04:39	04:28	55,268,213	59,576,000	-4%	8%
New Zealand	17:56	12:56	103,431	135,744	-39%	31%
United Kingdom	09:09	14:25	4,440,484	10,497,940	58%	136%
USA	10:12	07:39	1,614,500	932,000	-33%	-42%
Tier 1 Total	41:57	39:29	61,426,628	71,141,684	-6%	16%
Tier 2						
Canada	12:43	13:58	652,579	1,065,521	10%	63%
Germany	20:56	21:01	67,892,169	72,276,963	0%	6%
Hong Kong	15:13	18:22	190,210	160,650	21%	-16%
India	13:32	20:40	202,126	895,000	53%	343%
Japan	02:54	02:35	4,598,712	3,099,132	-13%	-33%
Malaysia	20:58	22:51	1,384,646	1,424,771	9%	3%
Singapore	17:52	21:12	111,748	347,217	19%	211%
South Korea	05:00	05:15	18,493	50,300	5%	172%
Tier 2 Total	109:11	125:57	75,050,683	79,319,554	15%	6%
Grand Total	151:09	165:26	136,477,311	150,461,238	9%	10%

Note: Japan is included in the Tier 1 analysis; Pan Middle East has been removed from the Tier 2 analysis

6.5.2 Total Brand Exposure & Media Value Comparison

Tier 1

Although coverage fell marginally in the Tier 1 markets in 2009, the gross media value that Melbourne received through its brand exposure increased by AU\$722,494, (33%) whilst the net media increased by AU\$ 94,981(14%).

An exposure rise of over 750 seconds (13 minutes) in the UK drove this increase, with gross media value increasing to over AU\$ 2mil in 2009 from AU\$ 529, 496 (a 291% increase), again as a result of the performance of Jenson Button.

Figure 12: Brand Exposure & Media Value Comparison – Tier 1 Markets

Territory	Coverage (hh:mm)	Sightings	Brand Exposure (secs)	Gross Media Value of Brand Exposure (AU\$)	Net Media Value of Brand Exposure (AU\$)	Exposure per Hour
2008						
China	04:39	99	685	406,509	103,065	147
New Zealand	17:56	487	3,906	85,271	28,824	218
United Kingdom	09:09	228	2,001	529,496	194,352	219
USA	10:12	282	2,504	1,137,834	362,496	245
Total	41:57	1,095	9,096	2,159,110	688,737	217
2009						
China	04:28	112	1,050	49,024	19,776	235
New Zealand	12:56	215	2,246	51,489	13,919	174
United Kingdom	14:25	261	2,767	2,069,693	557,722	192
USA	07:39	175	1,498	711,397	192,301	196
Total	39:29	764	7,561	2,881,604	783,718	191
% Change						
China	-4%	14%	53%	-88%	-81%	60%
New Zealand	-28%	-56%	-42%	-40%	-52%	-20%
United Kingdom	58%	15%	38%	291%	187%	-12%
USA	-25%	-38%	-40%	-37%	-47%	-20%
Total	-6%	-30%	-17%	33%	14%	-12%

Tier 2

Overall results in Tier 2 markets were very positive, with a 15% rise in coverage producing a 40% increase in exposure to 43,613 seconds, a AU\$ 2,216,246 increase in gross media value to just under \$7.5 mil. (a 30% rise) and a AU\$743,205 (a 36% rise) increase in net media value.

Significant increases in Canada, Germany, Hong Kong, India, Malaysia and Singapore were partially offset by a fall in all metrics in the Japanese market.

Figure 13: Brand Exposure & Media Value Comparison – Tier 2 Markets

Territory	Coverage (hh:mm)	Sightings	Brand Exposure (secs)	Gross Media Value of Brand Exposure (AU\$)	Net Media Value of Brand Exposure (AU\$)	Exposure per Hour
2008						
Canada	12:43	353	3,133	199,781	63,665	246
Germany	20:56	359	3,434	2,252,748	609,598	164
Hong Kong	15:13	538	4,311	401,354	85,051	283
India	13:32	328	2,860	267,732	59,736	211
Japan	02:54	58	381	1,053,192	264,152	131
Malaysia	20:58	737	5,906	554,584	118,539	282
Singapore	17:52	631	5,051	468,129	99,259	283
South Korea	05:00	139	1,230	85,508	27,258	246
Total	109:11	3,143	26,305	5,283,029	1,327,259	241
2009						
Canada	13:58	247	2,205	232,137	84,154	158
Germany	21:01	271	2,739	2,957,956	841,467	130
Hong Kong	18:22	817	8,677	1,060,398	286,394	472
India	20:40	941	9,839	848,627	221,790	476
Japan	02:35	35	276	285,811	75,504	107
Malaysia	22:51	919	9,611	1,054,804	278,142	421
Singapore	21:12	879	9,297	1,046,668	279,529	438
South Korea	05:15	121	971	12,874	3,483	185
Total	125:57	4,231	43,613	7,499,275	2,070,464	346
% Change						
Canada	10%	-30%	-30%	14%	24%	-56%
Germany	0%	▲ -32%	▲ -20%	24%	28%	-26%
Hong Kong	21%	34%	50%	62%	70%	40%
India	53%	65%	71%	68%	73%	56%
Japan	-11%	▲ -41%	▲ -28%	▲ -73%	▲ -71%	▲ -18%
Malaysia	9%	20%	39%	47%	57%	33%
Singapore	19%	28%	46%	55%	64%	36%
South Korea	5%	▲ -13%	▲ -21%	▲ -85%	▲ -87%	▲ -25%
Total	15%	26%	40%	30%	36%	30%

6.6 Tier 1 & 2 Comparison – Dedicated Coverage³

6.6.1 Dedicated Coverage Hours of Coverage & Audience Analysis

Dedicated coverage in Tier 1 markets decreased marginally from 2008 (7%, 2 hours 50 minutes), however, audiences increased by 12%, thanks to increases across all territories except China. Conversely, the Tier 2 markets coverage increased by 12% to 115 hours, but audiences fell by 13%.

Figure 14: Dedicated Coverage and Audience Comparison in Tier 1 & 2 Markets

Territory	Dedicated Coverage (hh:mm)		Dedicated Coverage Cumulative Audience		Coverage Change (%)	Audience Change (%)
	2008	2009	2008	2009		
Tier 1						
China	03:38	03:08	8,564,457	4,422,000	-14%	-48%
New Zealand	17:54	12:51	91,863	123,838	-28%	35%
United Kingdom	08:50	14:01	3,301,800	8,723,840	59%	164%
USA	10:09	07:39	773,000	932,000	-25%	21%
Tier 1 Total	40:31	37:40	12,731,120	14,201,678	-7%	12%
Tier 2						
Canada	12:43	13:41	621,000	732,800	8%	18%
Germany	16:06	15:23	11,179,073	10,237,503	-4%	-8%
Hong Kong	15:03	18:10	100,246	89,964	21%	-10%
India	13:31	20:33	202,126	334,000	52%	65%
Japan	02:43	02:35	4,598,712	3,099,132	-5%	-33%
Malaysia	19:53	21:31	698,999	665,000	8%	-5%
Singapore	17:33	18:10	71,838	55,874	4%	-22%
South Korea	05:00	05:15	18,493	50,300	5%	172%
Tier 2 Total	102:33	115:19	17,490,487	15,264,573	12%	-13%

Note: Japan is included in the Tier 1 analysis; Pan Middle East has been removed from the Tier 2 analysis

In the Asian markets there were audience decreases in China, Hong Kong, Japan, Malaysia and Singapore which might suggest that a lunchtime start may have had a negative impact in this region, although further research in 2010 would be required to confirm this.

³ Dedicated coverage refers to live, delayed, repeat and highlights programming (i.e. it is dedicated to race coverage and as such does not include any other sports or news coverage)

The most significant fall in audiences was found in China where both qualifying and race coverage attracted a much lower viewership than in 2008:

- » Average audience for qualifying decreased from 3.4 mil. to 2.1 mil., (a decrease of 1.3 mil. or 67%)
- » Audiences for the live race fell to 2.3 mil. from 5.1 mil. (a decrease of 2.8 mil. or 117%)

In contrast, South Korean audiences rose by 172%, although this is not significant in real terms, reaching a cumulative audience of 50,300.

Coverage and viewership increased in India, with Force India performing relatively well (Adrian Sutil finished 9th and Giancarlo Fisichella 11th), although actual audience levels were not significant with the average audience of the live race reaching 61,000. Coverage in India is transmitted on ESPN Star, a cable and satellite channel which although has good penetration, reaching 34 mil. homes, rarely delivers significant audiences unless transmitting cricket coverage.

The UK drove the audience increase with a cumulative audience rise of 164% (5.5 million viewers), a result of four factors:

- » Interest in the reigning world champion, Lewis Hamilton
- » Change in broadcast time
- » Change in broadcaster from ITV to BBC1
- » Jenson Button's win

Although it is not possible to pinpoint the exact cause of the increase as there is no qualitative information available, the average audience for each programme on the BBC grew from 660,000 in 2008 to 1.09 mil. in 2009, a rise of 65%.

There undoubtedly would have been considerable interest in the UK in Hamilton as he prepared to defend his title, and the later race time would certainly made the live coverage more attractive to viewers. Therefore it is possible that these factors contributed significantly to the increase in live coverage audiences, with news of Jenson Button's victory potentially having a impact on the repeated coverage. The key figures from the UK are:

- » The average audience of the live coverage of the qualifying rose by 580,100 from 394,900 to 975,000 (an increase of 147%)
- » Live race coverage in the UK rose by 1.3 mil. to 2.1 mil. (156%)
- » Repeat coverage of the race increased by 2.7 mil. (1489%)

Figure 15: UK Programming Comparison – 2008 vs. 2009

Programme	Channel	Start Time	Average Audience	Channel	Start Time	Average Audience
Live Qualifying	ITV 1	02:16	394,900	BBC1	05:00	975,000
Repeat Qualifying	ITV 1	13:24	1,754,500	BBC1	13:00	2,533,000
Live Race	ITV 1	03:28	832,600	BBC1	06:00	2,133,000
Repeat Race	ITV 4	12:45	180,900	BBC1	13:01	2,874,000

In Germany, there was a marginal decrease in dedicated coverage and the cumulative audience, but qualifying and race coverage live audiences were on average higher than in 2008 (see graph below).

The decrease in cumulative audience (cumulative audience being the sum of each programmes' average audience) was a result of a change to the mix in programmes in Germany, where coverage is shown on both DSF and RTL:

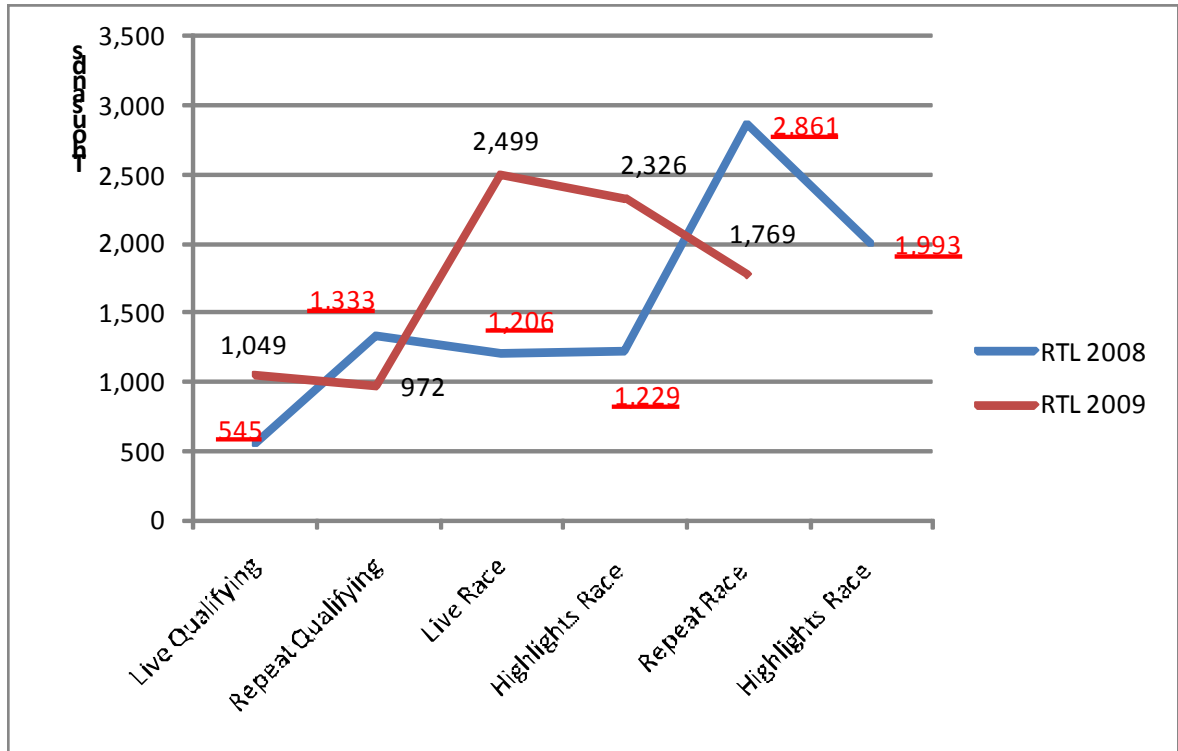
- » In 2008, RTL transmitted seven programmes, with five on DSF; in 2009 RTL transmitted six programmes and DSF six programmes – a second race highlights programme shown on RTL in 2008 was not transmitted in 2009.
- » RTL brings in higher audiences than DSF (see table below) and therefore this switch resulted in a change to cumulative audience.

Figure 16: German Dedicated Coverage Programming Summary

Channel	Number of Programmes	2008		2009		
		Average Audience (000's)	Cumulative Audience (000's)	Number of Programmes	Average Audience (000's)	Cumulative Audience (000's)
RTL	7	1,384	9,691	6	1,515	9,095
DSF	5	297	1,487	6	190	1,142

- » Overall, average audiences on RTL were higher in 2009 than in 2008 (1.5 mil. vs. 1.4 mil. in 2008).
- » The live race and qualifying programmes drew significantly higher audiences in 2009 compared to 2008.
- » Strong performances by German drivers in qualifying – Vettel qualified in 3rd, Rosberg in 5th and Heidfeld in 9th would have generated interest in the race coverage.
- » The live coverage drew an audience of 2.5 mil. (a 1.3 mil. increase, or 107%), whilst the highlights programme generated an audience of 2.3 mil, (a 1.1 mil. increase, or 89%).
- » In 2008, the majority of the RTL audience watched repeat coverage transmitted at 10.00 am, with over 2.8 mil. watching this programme, an audience 1.1 mil. higher than the corresponding programme in 2009.

Figure 17: RTL Average Audiences 2008 – 2009 (Selected Programmes)



6.6.2 Dedicated Coverage, Brand Exposure & Media Value Comparison

Tier 1

Across the Tier 1 territories, gross media value for Melbourne increased by 845,578 (42%) and net media value by 119,418 (18%). However, this increase came about despite lower exposure levels – at an aggregate level, partially due to a fall in coverage of 7%, but also due to a 15% drop in exposure per hour to 183 seconds, and a 34% drop in the number of sightings (356 fewer than in 2008).

Figure 18: Dedicated Coverage, Brand Exposure & Media Value Comparison - Tier 1 Markets

Territory	Coverage (hh:mm)	Sightings	Brand Exposure (secs)	Gross Media Value of Brand Exposure (AU\$)	Net Media Value of Brand Exposure (AU\$)	Exposure per Hour
2008						
China	03:38	70	445	264,201	65,954	122
New Zealand	17:54	486	3,896	85,053	28,681	217
United Kingdom	08:50	218	1,926	516,524	190,969	218
USA	10:09	280	2,491	1,137,656	362,400	245
Total	40:31	1,055	8,758	2,003,433	648,004	216
2009						
China	03:08	66	590	20,468	5,498	188
New Zealand	12:51	212	2,216	50,304	13,326	172
United Kingdom	14:01	245	2,607	2,066,842	556,296	186
USA	07:39	175	1,498	711,397	192,301	196
Total	37:40	699	6,911	2,849,011	767,422	183
% Change						
China	-14%	-6%	33%	-92%	-92%	54%
New Zealand	-28%	-56%	-43%	-41%	-54%	-21%
United Kingdom	59%	12%	35%	300%	191%	-15%
USA	-25%	-38%	-40%	-37%	-47%	-20%
Total	-7%	-34%	-21%	42%	18%	-15%

As outlined in the brand exposure summary above, exposure per hour levels dropped year-on-year – from 216 seconds per hour to 183 in 2009. This decrease, combined with the drop in coverage ultimately lead to the decline in exposure.

The disconnect between the fall in exposure and media value increase is due to increases in the UK, where coverage and audiences rose (as explained above). Coverage was transmitted on the national terrestrial broadcaster the BBC which generated significant audiences across its coverage and therefore carries a high advertising equivalent value.

Tier 2

Tier 2 coverage increased from 102.5 hours in 2008 to over 115 hours in 2009, with significant increases in Hong Kong and India (3 hours and 7 hours respectively). In the Tier 2 group, only Germany and Japan reduced their coverage in 2009, both by 5%.

Correspondingly, exposure and gross media value increased by 65% and 62% respectively, with Melbourne generating AU\$ 7.1 mil. in gross media value, up from AU\$4.4 in 2008.

Key Findings in the Tier 2 Group are:

- » Overall exposure in Tier 2 rose by 4.5 hours and gross media value by AU\$ 2.7 mil.
- » Germany registered significant increase in gross media value to AU\$ 2.7 mil., an 81% increase, a result of higher audiences in this market (and therefore higher advertising values).
- » Hong Kong's exposure rose by 4,299 secs to 8,567 secs, generating a media value of over AU\$ 1 mil. due to their increase in coverage.
- » India, Malaysia and Singapore increased their gross media values by over AU\$ 500,000 each, with India generating just under 7,000 additional seconds (over 1 hour of additional exposure for Melbourne and Victoria).
- » Melbourne's exposure levels increased by an hour in Hong Kong, Malaysia and Singapore.

Figure 19: Dedicated Coverage, Brand Exposure & Media Value Comparison - Tier 2 Markets

Territory	Coverage (hh:mm)	Sightings	Brand Exposure (secs)	Gross Media	Net Media	Exposure per Hour
				Value of Brand Exposure (AU\$)	Value of Brand Exposure (AU\$)	
2008						
Canada	12:43	352	3,123	199,640	63,573	246
Germany	16:06	224	2,303	1,510,991	416,163	143
Hong Kong	15:03	533	4,268	400,750	84,893	284
India	13:31	327	2,850	267,591	59,643	211
Japan	02:43	53	334	923,762	230,400	123
Malaysia	19:53	707	5,653	530,782	112,332	284
Singapore	17:33	621	4,974	467,038	98,975	283
South Korea	05:00	139	1,230	85,508	27,258	246
Total	102:33	2,956	24,734	4,386,063	1,093,237	241
2009						
Canada	13:41	232	2,055	136,645	36,409	150
Germany	15:23	143	1,459	2,733,983	729,481	95
Hong Kong	18:10	806	8,567	1,021,066	266,729	472
India	20:33	938	9,809	848,182	221,567	477
Japan	02:35	35	276	285,811	75,504	107
Malaysia	21:31	878	9,201	1,044,771	273,125	428
Singapore	18:10	806	8,567	1,021,066	266,729	472
South Korea	05:15	121	971	12,874	3,483	185
Total	115:19	3,960	40,903	7,104,399	1,873,027	355
% Change						
Canada	8%	-52%	-52%	-46%	-75%	-64%
Germany	■ -5%	-57%	-58%	81%	75%	-51%
Hong Kong	21%	51%	101%	155%	214%	66%
India	52%	187%	244%	217%	271%	126%
Japan	■ -5%	■ -52%	■ -21%	■ -223%	■ -205%	■ -15%
Malaysia	8%	24%	63%	97%	143%	50%
Singapore	4%	30%	72%	119%	169%	66%
South Korea	5%	■ -14%	■ -27%	■ -564%	■ -683%	■ -33%
Total	12%	34%	65%	62%	71%	47%

6.7 Tier 1 & 2 Comparison – Magazine & News Coverage⁴

6.7.1 Magazine & News - Hours of Coverage & Audience Analysis

Magazine and news coverage increased in both Tier 1 and 2 markets in 2009, resulting in a growth of 4 hours and 22 minutes from 2008. However, due to a decrease in Tier 2 audiences of 12 mil., the cumulative audience reached through magazine and news programming fell by 14.1. mil.

- » Tier 1 coverage increased by 22 minutes (27%), thanks to increased coverage in the UK (and additional 5 minutes) and significant additional coverage in China (18 minutes). The audience increase in Tier 1 was driven by a 8.4 mil. increase in Chinese audiences (18%) and an increase of 635,000 in the UK (56%).
- » Tier 2 coverage grew by just under 4 hours (60%), but cumulative audiences declined significantly due to no registered coverage in Japan (which was switched from Tier 1 in 2008). This led to a decrease of 14.1 mil, or 12% in Tier 2 cumulative audience.
- » However if the Japanese audience (28 mil. in 2008) is removed from the calculation, like for like audiences in Tier 1 and Tier 2 markets rose by 14.7 mil., or 12%.
- » A similar like for like analysis calculates that Tier 2 audience rose by 6.4 mil., or 10%.

⁴ Magazine coverage is defined as any coverage of the race contained within a general sports programme, news coverage is any coverage included within a news programme

Figure 20: Magazine & News Coverage Comparison in Tier 1 & 2 Markets

Territory	2008				2009			
	Number of Channels	Number of Broadcasts	Coverage (hh:mm)	Cumulative Audience	Number of Channels	Number of Broadcasts	Coverage (hh:mm)	Cumulative Audience
Tier 1								
China	6	44	01:01	46,703,756	7	46	01:19	55,154,000
New Zealand	2	3	00:02	11,568	2	3	00:04	11,906
United Kingdom	5	21	00:19	1,138,684	4	16	00:24	1,774,100
USA	2	3	00:03	841,500	-	-	-	-
Tier 1 Total	15	71	01:26	48,695,508	13	65	01:48	56,940,006
Tier 2								
Canada	1	1	00:00	31,579	8	15	00:17	332,721
Germany	7	40	04:49	56,713,096	25	128	05:37	62,039,460
Hong Kong	3	14	00:10	89,964	6	11	00:12	70,686
India	1	1	00:01	-	2	3	00:07	561,000
Japan	2	11	00:11	28,891,000	-	-	-	-
Malaysia	7	37	01:04	685,647	5	41	01:19	759,771
Singapore	5	10	00:19	39,910	6	73	03:02	291,343
South Korea	-	-	-	-	-	-	-	-
Tier 2 Total	26	114	06:38	86,451,196	52	271	10:37	64,054,981
Total	41	185	08:04	135,146,704	65	336	12:26	120,994,987

Notes: Japan is included in the Tier 1 analysis; Pan Middle East has been removed from the Tier 2 analysis; in 2008, the Indian news programme containing Australian GP coverage did not register and audience; in 2009, no coverage was registered in the USA or Japan; in both 2008 and 2009 no coverage was registered in South Korea

6.7.2 Magazine & News Coverage Exposure & Media Value Comparison

Tier 1

Exposure per hour levels increased significantly in 2009 compared to 2008, from 228 seconds to 358 seconds, with a corresponding increase in exposure levels (an increase of 322 seconds, or 98%). Overall brand sightings increased by 25, to 65 sightings, with the majority of these sightings visible in China.

- » Media values fell significantly due to lower reported commercial rates in China, where although coverage increased by 18 minutes, gross media value fell by 80%.
- » Reported commercial rates were much lower in the UK compared to 2008, resulting in a significantly reduced gross and net media values – AU\$2,851 and AU\$1,426 respectively.

Figure 21: Brand Exposure & Media Value Comparison – Tier 1 Markets

Territory	Coverage (hh:mm)	Sightings	Brand Exposure (secs)	Gross Media Value of Brand Exposure (AU\$)	Net Media Value of Brand Exposure (AU\$)	Exposure per Hour
2008						
China	01:01	29	240	142,308	37,111	235
New Zealand	00:02	1	10	218	143	271
United Kingdom	00:19	9	76	12,972	3,383	235
USA	00:03	2	13	179	96	235
Total	01:26	40	328	155,677	40,733	228
2009						
China	01:19	46	460	28,556	14,278	345
New Zealand	00:04	3	30	1,185	593	369
United Kingdom	00:24	16	160	2,851	1,426	398
USA	-	-	-	-	-	-
Total	01:48	65	650	32,593	16,296	358
% Change						
China	30%	61%	92%	-80%	-62%	47%
New Zealand	120%	190%	200%	443%	314%	36%
United Kingdom	25%	77%	112%	-78%	-58%	70%
USA	0%	0%	0%	0%	0%	0%
Total	-27%	62%	98%	-79%	-60%	57%

Tier 2

Tier 2 coverage increased by 60% to 10 hours and 37 minutes, with brand exposure increasing to 2,710 seconds (a 45% increase). Exposure per hour levels rose by 21 seconds per hour to 255 seconds, an increase of 9%.

- » Due to a significant decrease in Germany (231% in total, over AU\$ 500,000), total media value delivered dropped by 127% on a gross level to AU\$394,876.
- » A further decrease in Malaysia was offset by increases in media value in Singapore, India, Hong Kong and Canada.

Figure 22: Brand Exposure & Media Value Comparison – Tier 2 Markets

Territory	Coverage (hh:mm)	Sightings	Brand Exposure (secs)	Gross Media Value of Brand Exposure (AU\$)	Net Media Value of Brand Exposure (AU\$)	Exposure per Hour
2008						
Canada	00:00	1	10	141	93	1,500
Germany	04:49	135	1,131	741,757	193,435	235
Hong Kong	00:10	5	43	605	158	235
India	00:01	1	10	141	93	600
Japan	00:11	6	47	129,429	33,752	235
Malaysia	01:04	30	253	23,802	6,207	235
Singapore	00:19	9	77	1,090	284	235
South Korea	-	-	-	-	-	-
Total	06:38	187	1,551	896,966	234,022	234
2009						
Canada	00:17	15	150	95,491	47,746	512
Germany	05:37	128	1,280	223,974	111,987	228
Hong Kong	00:12	11	110	39,331	19,666	543
India	00:07	3	30	446	223	243
Japan	-	-	-	-	-	-
Malaysia	01:19	41	410	10,033	5,016	308
Singapore	03:02	73	730	25,601	12,801	239
South Korea	-	-	-	-	-	-
Total	10:37	271	2,710	394,876	197,438	255
% Change						
Canada	4296%	1400%	1400%	67465%	51476%	-66%
Germany	17%	-5%	13%	-231%	-73%	-3%
Hong Kong	11%	115%	157%	6402%	12366%	132%
India	642%	200%	200%	215%	141%	-60%
Japan	-	-	-	-	-	-
Malaysia	23%	35%	62%	-137%	-24%	31%
Singapore	827%	692%	846%	2248%	4403%	2%
South Korea	-	-	-	-	-	-
Total	60%	45%	75%	-127%	-19%	9%

7.0 2009 AUSTRALIAN GRAND PRIX ANALYSIS

7.1 Global Sample Analysis

The Broadcast Distribution, Brand Exposure and Media Valuation Report quantifies the number of broadcast hours of the Australian Grand Prix in selected territories, calculates global viewing figures, measures the amount of exposure for Melbourne and Victoria generated from the coverage, and enables a financial value to be placed on the brand exposure.

- » The global sample covering 35 territories (82 countries) transmitted 444 hours and 20 minutes of coverage, including dedicated coverage from all territories, and magazine and news coverage from Tier 1, Tier 2 and Tier 3 territories only.
- » The total coverage returned a Gross Media Value of AU\$355.9 million and a Net Media Value worth AU\$35.6 million.

Figure 23: Gross and Net Media Value based on Total Coverage by Global Sample

Number of Territories	Number of Countries	Total Coverage (hh:mm)	Gross Media Value of Total Coverage (AU\$)	Net Media Value of Total Coverage (AU\$)
35	82	444:20	355,943,054	35,594,305

- » The global sample, with 444 hours and 20 minutes of coverage of the 2009 Australian Grand Prix, attracted a cumulative television audience of 270.7 million.
- » The global coverage generated 116,085 seconds (32 hours and 14 minutes) of brand exposure for Victoria and Melbourne, returning a Gross Media Value of AU\$20.9 million and a Net Media Value worth AU\$6.0 million.
- » The total coverage from the global sample returned a Gross Media Value of AU\$355.9 million and a Net Media Value worth AU\$35.6 million.
- » This generated 116,085 seconds (32 hours and 14 minutes) of brand exposure, returning a Gross Media Value of AU\$20.9 million and a Net Media Value worth AU\$6.0 million.

A summary table with all key measurements across Tiers 1-3 and 'Other Markets' (i.e. those markets that have not been classified within the three Tiers requested by Tourism Victoria) is presented on the following page.

Figure 24: 2009 Australian Grand Prix – All Coverage Measurement Summary

Territory	Number of Broadcasts	Total Coverage (hh:mm)	Cumulative Audience	Gross Media Value of Total Coverage (AU\$)	Net Media Value of Total Coverage (AU\$)	Brand Exposure (secs)	Gross Media Value of Brand Exposure (AU\$)	Net Media Value of Brand Exposure (AU\$)
Tier 1¹								
China	48	04:28	59,576,000	7,249,714	724,971	1,050	393,049	112,192
New Zealand	12	12:56	135,744	1,062,701	106,270	2,246	51,489	13,919
United Kingdom	24	14:25	10,497,940	25,555,285	2,555,529	2,767	1,358,953	367,435
USA	5	07:39	932,000	13,079,664	1,307,966	1,498	711,397	192,301
Tier 1 Total	89	39:29	71,141,684	46,947,364	4,694,736	7,561	2,514,889	685,847
Tier 2¹								
Canada	23	13:58	1,065,521	3,865,497	386,550	2,205	232,137	84,154
Germany	140	21:01	72,276,963	94,406,287	9,440,629	2,739	3,643,520	1,184,249
Hong Kong	25	18:22	160,650	7,956,965	795,696	8,677	1,060,398	286,394
India	18	20:40	895,000	6,400,030	640,003	9,839	848,627	221,790
Japan	2	02:35	3,099,132	26,726,030	2,672,603	276	792,813	209,442
Malaysia	57	22:51	1,424,771	8,301,417	830,142	9,611	1,054,804	278,142
Singapore	87	21:12	347,217	8,145,440	814,544	9,297	1,046,668	279,529
South Korea	4	05:15	50,300	1,369,309	136,931	971	70,186	19,015
Tier 2 Total	356	125:57	79,319,554	157,170,975	15,717,097	43,613	8,749,152	2,562,716
Tier 3¹								
Denmark	12	19:30	149,365	10,262,534	1,026,253	2,936	555,272	150,343
Finland	21	21:33	739,435	8,018,753	801,875	3,992	378,111	103,705
France	62	04:18	36,689,802	9,207,467	920,747	1,039	484,004	175,307
Iceland	6	09:26	15,000	16,130	1,613	1,901	905	243
Indonesia	14	03:16	771,396	92,763	9,276	668	5,260	1,631
Italy	71	04:33	64,933,202	29,820,994	2,982,099	1,171	1,850,019	591,773
Netherlands	11	07:52	2,212,208	1,423,477	142,348	1,479	74,294	21,180
Norway	15	21:35	81,215	2,282,062	228,206	4,297	132,400	37,529
Sweden	12	18:59	234,398	2,167,338	216,734	3,636	113,643	30,211
Switzerland	11	15:04	452,485	29,616,020	2,961,602	2,846	1,548,507	416,077
Taiwan	25	22:50	462,759	9,329,811	932,981	11,010	1,250,491	328,337
Thailand	52	18:56	2,242,904	8,073,819	807,382	8,421	988,296	268,054
Tier 3 Total	312	167:57	108,984,168	110,311,168	11,031,117	43,396	7,381,201	2,124,391
Others²								
Argentina	6	10:00	410,010	3,346,800	334,680	1,912	177,750	47,873
Austria	5	08:08	401,000	4,350,509	435,051	1,544	221,174	59,360
Belgium	5	07:20	488,265	1,938,333	193,833	1,428	103,728	28,039
Brazil	7	07:28	711,859	1,183,616	118,362	1,446	63,669	16,858
Czech Republic	3	02:38	1,274,000	2,608,282	260,828	444	134,081	36,414
Hungary	4	08:42	2,169,700	10,015,809	1,001,581	1,631	535,713	144,442
Pan Africa ³	10	17:50	49,877	1,351,987	135,199	3,602	77,572	20,829
Romania	3	04:09	624,100	2,557,006	255,701	740	126,513	33,961
Russia	5	08:42	955,400	1,555,627	155,563	1,685	83,398	22,494
South Africa	9	17:50	181,050	1,365,582	136,558	3,572	76,057	20,582
Spain	8	18:07	4,008,222	11,239,997	1,124,000	3,512	627,563	170,282
Others Total	65	110:56	11,273,483	41,513,547	4,151,355	21,515	2,227,218	601,133
Grand Total	822	444:20	270,718,890	355,943,054	35,594,305	116,085	20,872,461	5,974,087

¹ Dedicated coverage and magazine and new s coverage

² Dedicated coverage only

³ Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Congo, Congo DR, Côte d'Ivoire, Djibouti, Equatorial Guinea, Eritrea, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Liberia, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mayotte, Mozambique, Namibia, Niger, Nigeria, Réunion, Rwanda, Saint Helena, Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, South Africa, Sudan, Swaziland, Tanzania, Togo, Uganda, Zambia, Zimbabwe

7.2 Tier 1, Tier 2 and Tier 3 Summary

The key territories for Tourism Victoria have been defined as:

- » Tier 1: China, New Zealand, United Kingdom and USA
 - » Tier 2: Canada, Germany, Hong Kong, India, Japan, Malaysia, Singapore and South Korea
 - » Tier 3: Denmark, Finland, France, Iceland, Indonesia, Italy, Netherlands, Norway, Sweden, Switzerland, Taiwan and Thailand
- » The Australian Grand Prix received 333 hours and 24 minutes of televised coverage from dedicated broadcasts, magazine shows and news clips in the Tier 1, Tier 2 and Tier 3 territories. This combined coverage generated 94,570 seconds (26 hours and 16 minutes) of brand exposure for Melbourne and Victoria in Tier 1, Tier 2 and Tier 3 territories.
- » The brand exposure returned a Gross Media Value of AU\$18.6 million and a Net Media Value worth AU\$5.4 million.
- » From dedicated broadcasts, magazine shows and news clips, Tier 1 territories attracted a cumulative audience of 71.1 million viewers, and returned a Gross Media Value of AU\$2.5 million and a Net Media Value of AU\$685,847 for the brand exposure of Melbourne and Victoria.
- » Tier 2 territories drew a cumulative audience of 79.3 million viewers to the combined televised coverage from dedicated broadcasts, magazine shows and news clips. The brand exposure for Melbourne and Victoria that this coverage generated returned a Gross Media Value of AU\$8.7 million and a Net Media Value worth AU\$2.6 million.
- » Tier 3 territories drew a cumulative audience of 109.0 million viewers, while returning a Gross Media Value of AU\$7.4 million and Net Media Value worth AU\$2.1 million.

Tier 1 Summary

- » China, New Zealand, United Kingdom and USA - transmitted 39 hours and 29 minutes of coverage, including dedicated and magazine and news coverage, attracting a cumulative television audience of 71.1 million viewers.
- » The coverage generated 7,561 seconds of brand exposure for Melbourne and Victoria, returning a Gross Media Value of AU\$2.5 million and a Net Media Value worth AU\$685,847.

Tier 2 Summary

- » Canada, Germany, Hong Kong, India, Japan, Malaysia, Singapore and South Korea - transmitted 125 hours and 57 minutes of coverage, including dedicated and magazine and news coverage, attracting a cumulative television audience of 79.3 million viewers.
- » The coverage generated 43,613 seconds of brand exposure for Melbourne and Victoria, returning a Gross Media Value of AU\$8.7 million and a Net Media Value worth AU\$2.6 million.

Tier 3 Summary

- » Denmark, Finland, France, Iceland, Indonesia, Italy, Netherlands, Norway, Sweden, Switzerland, Taiwan and Thailand - transmitted 167 hours and 57 minutes of coverage, including dedicated and magazine and news coverage, attracting a cumulative television audience of 109.0 million viewers.
- » The coverage generated 43,396 seconds of brand exposure for Melbourne and Victoria, returning a Gross Media Value of AU\$7.4 million and Net Media Value worth AU\$2.1 million.

Figure 25: 2009 Australian Grand Prix Tiers 1 – 3 Measurement Summary

Territory	Number of Broadcasts	Total Coverage (hh:mm)	Cumulative Audience	Gross Media Value of Total Coverage (AU\$)	Net Media Value of Total Coverage (AU\$)	Brand Exposure (secs)	Gross Media Value of Brand Exposure (AU\$)	Net Media Value of Brand Exposure (AU\$)
Tier 1								
China	48	04:28	59,576,000	7,249,714	724,971	1,050	393,049	112,192
New Zealand	12	12:56	135,744	1,062,701	106,270	2,246	51,489	13,919
United Kingdom	24	14:25	10,497,940	25,555,285	2,555,529	2,767	1,358,953	367,435
USA	5	07:39	932,000	13,079,664	1,307,966	1,498	711,397	192,301
Tier 1 Total	89	39:29	71,141,684	46,947,364	4,694,736	7,561	2,514,889	685,847
Tier 2								
Canada	23	13:58	1,065,521	3,865,497	386,550	2,205	232,137	84,154
Germany	140	21:01	72,276,963	94,406,287	9,440,629	2,739	3,643,520	1,184,249
Hong Kong	25	18:22	160,650	7,956,965	795,696	8,677	1,060,398	286,394
India	18	20:40	895,000	6,400,030	640,003	9,839	848,627	221,790
Japan	2	02:35	3,099,132	26,726,030	2,672,603	276	792,813	209,442
Malaysia	57	22:51	1,424,771	8,301,417	830,142	9,611	1,054,804	278,142
Singapore	87	21:12	347,217	8,145,440	814,544	9,297	1,046,668	279,529
South Korea	4	05:15	50,300	1,369,309	136,931	971	70,186	19,015
Tier 2 Total	356	125:57	79,319,554	157,170,975	15,717,097	43,613	8,749,152	2,562,716
Tier 3								
Denmark	12	19:30	149,365	10,262,534	1,026,253	2,936	555,272	150,343
Finland	21	21:33	739,435	8,018,753	801,875	3,992	378,111	103,705
France	62	04:18	36,689,802	9,207,467	920,747	1,039	484,004	175,307
Iceland	6	09:26	15,000	16,130	1,613	1,901	905	243
Indonesia	14	03:16	771,396	92,763	9,276	668	5,260	1,631
Italy	71	04:33	64,933,202	29,820,994	2,982,099	1,171	1,850,019	591,773
Netherlands	11	07:52	2,212,208	1,423,477	142,348	1,479	74,294	21,180
Norway	15	21:35	81,215	2,282,062	228,206	4,297	132,400	37,529
Sweden	12	18:59	234,398	2,167,338	216,734	3,636	113,643	30,211
Switzerland	11	15:04	452,485	29,616,020	2,961,602	2,846	1,548,507	416,077
Taiwan	25	22:50	462,759	9,329,811	932,981	11,010	1,250,491	328,337
Thailand	52	18:56	2,242,904	8,073,819	807,382	8,421	988,296	268,054
Tier 3 Total	312	167:57	108,984,168	110,311,168	11,031,117	43,396	7,381,201	2,124,391
Grand Total	757	333:24	259,445,406	314,429,507	31,442,951	94,570	18,645,242	5,372,954

7.3 Tier 1, Tier 2 and Tier 3 Broadcast Analysis

7.3.1 Broadcast Hours and Cumulative Audience

- » Tier 1, Tier 2 and Tier 3 territories aired 227 dedicated broadcasts of the 2009 Australian Grand Prix, the opening round of the FIA Formula One World Championship.
- » These broadcasts produced 316 hours and 22 minutes of dedicated coverage and were watched by a cumulative audience of 42.4 million people.

Tier 1

- » The Tier 1 territories – China, New Zealand, United Kingdom and USA - broadcast 37 hours and 40 minutes of programming, 12% of the total coverage. However, they attracted one-third (34%) of the cumulative audience, with 14.2 million viewers.
- » The United Kingdom, with coverage on public-service broadcaster BBC, drew a cumulative audience of 8.7 million viewers, 21% of the total.
- » China, with coverage on free-to-air sports channel CCTV5, was responsible for a further 10% of the cumulative audience, with 4.4 million viewers.
- » In the USA, cable channel Speed's coverage of the Grand Prix was watched by a cumulative audience of 932,000, only 2% of the total.
- » Due to its small population of 4.2 million people and coverage on satellite broadcaster Sky Sport, New Zealand, the number one source of tourists to Australia, attracted less than 1% of the cumulative audience, with 123,838 viewers.

Tier 2

- » The Tier 2 territories accounted for 36% of both coverage and cumulative audience with 115 hours and 19 minutes of programming and 15.3 million viewers respectively.
- » Tier 2 and Formula One stronghold, Germany, drew the largest cumulative audience out of all territories with 10.2 million viewers, 24% of the total.
- » Japanese coverage of the race on Fuji TV was watched by a cumulative audience of 3.1 million viewers, 7% of the total.
- » Asian territories Hong Kong, India, Malaysia, Singapore and South Korea combined for 83 hours and 39 minutes of coverage and a cumulative audience of 1.2 million viewers, representing 26% and 3% of the totals respectively.

Tier 3

- » The Tier 3 territories broadcast 163 hours and 22 minutes of programming, the majority (52%) of the coverage, but attracted less than one-third (30%) of the cumulative audience with 12.9 million viewers.
- » Italian coverage on public-service broadcaster Rai accounted for 12% of the total cumulative audience with 5.1 million viewers.
- » French broadcaster TF1 drew 3.1 million viewers, while Dutch coverage on RTL7 was watched by 2.2 million viewers, corresponding to 7% and 5% of the total cumulative audience respectively.

Figure 26: Dedicated Coverage, Audience and Brand Exposure Media Value Summary

Territory	Channel	Number of Broadcasts	Dedicated Coverage (hh:mm)	Cumulative Audience	Gross Media Value of Brand Exposure (AU\$)	Net Media Value of Brand Exposure (AU\$)
Tier 1						
China	CCTV5	2	03:08	4,422,000	364,493	97,914
New Zealand	SKY Sport 1	3	04:18	89,900	17,108	4,602
	SKY Sport 2	4	05:50	26,000	24,079	6,316
	SKY Sport 3	2	02:43	7,938	9,117	2,409
United Kingdom	BBC1	4	08:31	8,515,000	1,336,311	359,823
	BBC3	1	01:00	52,210	12,736	3,327
	BBCi	3	04:30	156,630	2,871	767
USA	Speed	5	07:39	932,000	711,397	192,301
Tier 1 Total		24	37:40	14,201,678	2,478,112	667,459
Tier 2						
Canada	RDS	4	07:17	358,000	89,810	24,072
	TSN	4	06:24	374,800	46,835	12,337
Germany	DSF	6	07:08	1,141,933	248,436	64,898
	RTL	6	08:15	9,095,570	2,485,547	664,583
Hong Kong	STAR Sports	14	18:10	89,964	1,021,066	266,729
India	STAR Sports	15	20:33	334,000	848,182	221,567
Japan	Fuji TV	2	02:35	3,099,132	792,813	209,442
Malaysia	NTV7	2	03:21	381,000	23,704	6,397
	STAR Sports	14	18:10	284,000	1,021,066	266,729
Singapore	STAR Sports	14	18:10	55,874	1,021,066	266,729
South Korea	MBC ESPN	4	05:15	50,300	70,186	19,015
Tier 2 Total		85	115:19	15,264,573	7,668,712	2,022,496
Tier 3						
Denmark	TV2 Sport	3	04:12	62,400	123,313	33,092
	TV3 Plus	9	15:18	86,965	431,959	117,251
Finland	MTV3	4	04:00	655,200	112,496	29,876
	MTV3 Max	11	17:20	54,505	250,617	66,329
France	TF1	3	03:10	3,111,700	282,292	74,451
Iceland	Stöð 2 Sport	6	09:26	15,000	905	243
Indonesia	GTV	2	02:55	513,000	4,315	1,159
Italy	Rai Due	1	00:54	1,092,600	67,949	18,144
	Rai Uno	1	01:44	3,977,700	1,392,444	378,816
Netherlands	RTL7	9	07:46	2,182,100	69,151	18,609
Norway	SportN	3	06:00	13,035	35,748	9,725
	Viasat 4	1	00:43	20,385	2,940	785
	Viasat Motor	5	08:20	21,725	46,917	12,449
	Viasat Sport	3	06:30	13,035	38,727	10,536
Sweden	TV6 SE	2	02:09	146,000	37,211	9,932
	Viasat Motor	10	16:50	88,398	76,432	20,279
Switzerland	RSI LA 2	4	06:09	29,170	43,988	11,817
	SF zwei	4	05:52	354,903	1,130,917	303,813
	TSR1	2	03:02	63,380	373,412	100,352
Taiwan	STAR Sports	21	22:47	367,000	1,243,470	324,826
Thailand	STAR Sports	14	18:10	23,856	947,593	247,703
Tier 3 Total		118	163:22	12,892,055	6,712,797	1,790,188
Total		227	316:22	42,358,306	16,859,621	4,480,143

7.3.2 Broadcast Hours and Cumulative Audience - Magazine and News Coverage

Magazine and news coverage refers to footage from television programmes that present a variety of topics, usually on current events. Therefore, magazine and news coverage is not classified as dedicated coverage as the footage of the Australian Grand Prix is only a component of the television programme.

Often, broadcasters are unable to supply detailed running orders (i.e. the detail of the content of the programme) for their magazine and news coverage and therefore it is possible that not all magazine and news coverage has been accounted for in this analysis.

Key findings for Magazine and News Coverage are:

- » Tier 1, Tier 2 and Tier 3 territories broadcast 530 clips of the Australian Grand Prix which featured either verbal mentions or on-screen graphics of Melbourne or Victoria from magazine shows and news programmes on 112 different channels.
- » These broadcasts delivered 17 hours and 1 minute of magazine and news coverage and were watched by a cumulative audience of 217.1 million viewers.
- » Tier 2 territory Germany broadcast the greatest amount of magazine and news coverage with 5 hours and 37 minutes (33% of the total), and drew the largest cumulative audience of 62.0 million people (29% of the total).
- » From Tier 3, Italy drew the second largest cumulative audience with 55.9 million viewers (28%) tuning in to 1 hour and 54 minutes (11%) of magazine and news footage.
- » In Tier 1, China aired the greatest amount of magazine and news coverage with 1 hour and 19 minutes (8%) and drew the largest cumulative audience of 55.2 million people (25%).

Figure 27: Magazine and News Coverage, Audience and Brand Exposure Media Value Summary

Territory	Number of Channels	Number of Broadcasts	M&N ¹ Coverage (hh:mm)	Cumulative Audience	Gross Media Value of Brand Exposure (AU\$)	Net Media Value of Brand Exposure (AU\$)
Tier 1						
China	7	46	01:19	55,154,000	28,556	14,278
New Zealand	2	3	00:04	11,906	1,185	593
United Kingdom	4	16	00:24	1,774,100	7,036	3,518
USA	-	-	-	-	-	-
Tier 1 Total	13	65	01:48	56,940,006	36,777	18,388
Tier 2						
Canada	8	15	00:17	332,721	95,491	47,746
Germany	25	128	05:37	62,039,460	909,538	454,769
Hong Kong	6	11	00:12	70,686	39,331	19,666
India	2	3	00:07	561,000	446	223
Japan	-	-	-	-	-	-
Malaysia	5	41	01:19	759,771	10,033	5,016
Singapore	6	73	03:02	291,343	25,601	12,801
South Korea	-	-	-	-	-	-
Tier 2 Total	52	271	10:37	64,054,981	1,080,440	540,220
Tier 3						
Denmark	-	-	-	-	-	-
Finland	3	6	00:13	29,730	14,998	7,499
France	11	59	01:07	33,578,102	201,712	100,856
Iceland	-	-	-	-	-	-
Indonesia	6	12	00:21	258,396	945	473
Italy	14	69	01:54	59,862,902	389,627	194,813
Netherlands	2	2	00:06	30,108	5,142	2,571
Norway	2	3	00:01	13,035	8,066	4,033
Sweden	-	-	-	-	-	-
Switzerland	1	1	00:00	5,033	190	95
Taiwan	2	4	00:03	95,759	7,021	3,511
Thailand	6	38	00:46	2,219,048	40,702	20,351
Tier 3 Total	47	194	04:35	96,092,113	668,404	334,202
Total	112	530	17:01	217,087,100	1,785,621	892,811

¹ Magazine and News

7.4 Tier 1, Tier 2 and Tier 3 Brand Exposure Analysis

7.4.1 Brand Exposure - Dedicated Coverage

Exposure, either visual sightings or verbal mentions of the sponsors' brand, is measured by two categories - Frequency (the number of times a brand is seen or heard) and Duration (the length of time in seconds a brand is seen or heard). Visual sightings are measured when at least two-thirds (67%) of the branding is clearly visible and on-screen for a minimum of one second. Verbal mentions are valued based on the equivalent of 10 seconds of brand exposure.

- » The brands monitored for exposure - visual sightings and verbal mentions - are the host city and state of the Grand Prix, "Melbourne" and "Victoria" respectively.
- » The dedicated coverage of the Grand Prix in Tier 1, 2 and 3 territories generated 89,270 seconds (24 hours and 47 minutes) of brand exposure for Melbourne and Victoria from 8,760 exposures.
- » Tier 3 territory Taiwan, with the most dedicated coverage (22 hours and 47 minutes), generated the largest amount of brand exposure for Melbourne and Victoria with 10,970 seconds (3 hours and 2 minutes).

Figure 28: Coverage, Brand Exposure & Media Value from Dedicated Coverage

Territory	Dedicated Coverage (hh:mm)	Brand Exposure Frequency	Brand Exposure (secs)	Gross Media Value of Brand Exposure (AU\$)	Net Media Value of Brand Exposure (AU\$)
Tier 1					
China	03:08	66	590	364,493	97,914
New Zealand	12:51	212	2,216	50,304	13,326
United Kingdom	14:01	245	2,607	1,351,918	363,917
USA	07:39	175	1,498	711,397	192,301
Tier 1 Total	37:40	699	6,911	2,478,112	667,459
Tier 2					
Canada	13:41	232	2,055	136,645	36,409
Germany	15:23	143	1,459	2,733,983	729,481
Hong Kong	18:10	806	8,567	1,021,066	266,729
India	20:33	938	9,809	848,182	221,567
Japan	02:35	35	276	792,813	209,442
Malaysia	21:31	878	9,201	1,044,771	273,125
Singapore	18:10	806	8,567	1,021,066	266,729
South Korea	05:15	121	971	70,186	19,015
Tier 2 Total	115:19	3,960	40,903	7,668,712	2,022,496
Tier 3					
Denmark	19:30	295	2,936	555,272	150,343
Finland	21:20	347	3,932	363,112	96,206
France	03:10	53	449	282,292	74,451
Iceland	09:26	190	1,901	905	243
Indonesia	02:55	61	548	4,315	1,159
Italy	02:38	60	481	1,460,392	396,960
Netherlands	07:46	167	1,459	69,151	18,609
Norway	21:33	464	4,267	124,334	33,496
Sweden	18:59	322	3,636	113,643	30,211
Switzerland	15:04	318	2,836	1,548,318	415,982
Taiwan	22:47	1,061	10,970	1,243,470	324,826
Thailand	18:10	762	8,041	947,593	247,703
Tier 3 Total	163:22	4,101	41,456	6,712,797	1,790,188
Total	316:22	8,760	89,270	16,859,621	4,480,143

Melbourne, the host city of the Grand Prix, received the highest share of brand exposure, generating 87,564 seconds of exposure, 98% of the total.

- » There were 3,183 verbal mentions of Melbourne, equivalent to 31,834 seconds of exposure.
- » Scenic footage of Melbourne and on-screen graphics generated 24,882 seconds (28%) and 14,787 seconds (17%) of exposure respectively, with scenic footage receiving an average of 19 seconds of exposure per sighting.
- » The Melbourne brand logo mark positioned over the track contributed 11,821 seconds of exposure, 13% of the total.

- » Victoria, the host state, generated 1,706 seconds of exposure, 2% of the total. The majority of Victoria’s exposure was secured from 119 verbal mentions, equivalent to 1,186 seconds of exposure.
- » Overall, signage - banners, backdrops, local area scenic shots and others - was the dominant source of branding, generating 41,008 seconds of exposure from 4,458 exposures, 46% and 51% of the totals.
- » Verbal mentions and on-screen graphics produced 33,020 seconds (37%) and 15,242 seconds (17%) of exposure respectively.

Figure 29: Brand Exposure from Dedicated Coverage by Type of Source

Source	Picture Number Reference	Brand Exposure Frequency	Brand Exposure (secs)	Brand Exposure / Sighting (secs)	Brand Exposure / Hour (secs)	Percentage of Brand Exposure (%)
Melbourne						
Graphics	1,2,3	924	14,787	16	34.6	16.56%
Local Area Scenic	5,6,7,8	1,325	24,882	19	58.2	27.87%
Other	15,16	47	117	3	0.3	0.13%
Overtrack Banner	9,10	1,938	11,821	6	27.7	13.24%
Pits Banner		-	-	-	-	0.00%
Podium Backdrop	11,12	1,045	3,838	4	9.0	4.30%
Track Banner	13,14	73	284	4	0.7	0.32%
Verbal Mentions	-	3,183	31,834	10	74.5	35.66%
Melbourne Total		8,534	87,564	10	204.9	98.09%
Victoria						
Graphics	4	76	455	6	1.1	0.51%
Other	-	31	64	2	0.2	0.07%
Verbal Mentions	-	119	1,186	10	2.8	1.33%
Victoria Total		225	1,706	8	4.0	1.91%
Total		8,760	89,270	10	208.9	100.00%

7.5 Verbal Mentions - Dedicated Coverage

There were 3,302 verbal mentions of Melbourne and Victoria during the dedicated coverage of the Australian Grand Prix in the selected territories. Of these verbal mentions, 367 had positive associations for the host city and state, representing 11% of the total.

Positive mentions of Melbourne and Victoria included:

- » “Absolutely beautiful here in Melbourne”
- » “This first race in Melbourne always sends such a positive charge through the paddock of Formula 1”
- » “Here in the sunshine in Melbourne”
- » “Still a good crowd. Something like four and a half million people have made their way through the gates here at Melbourne since the race was staged here for the first time in 1996”
- » “Still leading here in the evening sunshine in Melbourne”
- » “Big race in beautiful sunny Melbourne”
- » “All weekend there has been a nice Melbourne feel”

The majority of statements, 2,935 (representing 89% of the total), had no positive or negative associations for Melbourne or Victoria and were classified as ‘Neutral’ . These comments for Melbourne and Victoria included:

- » “We’re away in Melbourne for 2009”
- » “As we head into the final ten laps here in Melbourne”
- » “Welcome to Melbourne”

There were not considered to be any negative comments relating to either Melbourne or Victoria.

Figure 30: Verbal Mentions by Positive, Negative and Neutral Exposure

Verbal Mentions	Verbal Exposure Frequency	Verbal Exposure (secs)	Percentage of Verbal Exposure (%)
Positive	367	3,669	11%
Neutral	2,935	29,352	89%
Negative	-	-	-
Total	3,302	33,020	100%

7.5.1 Brand Exposure - Magazine and News Coverage

- » Magazine and news coverage from television programmes not devoted wholly to the Australian Grand Prix in Tier 1, Tier 2 and Tier 3 territories generated 5,300 seconds (1 hour and 28 minutes) of brand exposure for Melbourne and Victoria from 530 exposures.
- » Tier 2 market Germany, with the most magazine and news coverage, delivered the largest amount of brand exposure for Melbourne and Victoria with 1,280 seconds.
- » Out of the Tier 1 territories, China's magazine and news footage delivered the most brand exposure for Melbourne and Victoria with 460 seconds.
- » From Tier 3 territories, Italy's magazine and news footage provided the greatest amount of brand exposure for Melbourne and Victoria with 690 seconds.

Figure 31: Coverage, Brand Exposure & Media Value from Magazine and News Coverage

Territory	Magazine and News Coverage (hh:mm)	Brand Exposure Frequency	Brand Exposure (secs)	Gross Media Value of Brand Exposure (AU\$)	Net Media Value of Brand Exposure (AU\$)
Tier 1					
China	01:19	46	460	28,556	14,278
New Zealand	00:04	3	30	1,185	593
United Kingdom	00:24	16	160	7,036	3,518
USA	-	-	-	-	-
Tier 1 Total	01:48	65	650	36,777	18,388
Tier 2					
Canada	00:17	15	150	95,491	47,746
Germany	05:37	128	1,280	909,538	454,769
Hong Kong	00:12	11	110	39,331	19,666
India	00:07	3	30	446	223
Japan	-	-	-	-	-
Malaysia	01:19	41	410	10,033	5,016
Singapore	03:02	73	730	25,601	12,801
South Korea	-	-	-	-	-
Tier 2 Total	10:37	271	2,710	1,080,440	540,220
Tier 3					
Denmark	-	-	-	-	-
Finland	00:13	6	60	14,998	7,499
France	01:07	59	590	201,712	100,856
Iceland	-	-	-	-	-
Indonesia	00:21	12	120	945	473
Italy	01:54	69	690	389,627	194,813
Netherlands	00:06	2	20	5,142	2,571
Norway	00:01	3	30	8,066	4,033
Sweden	-	-	-	-	-
Switzerland	00:00	1	10	190	95
Taiwan	00:03	4	40	7,021	3,511
Thailand	00:46	38	380	40,702	20,351
Tier 3 Total	04:35	194	1,940	668,404	334,202
Total	17:01	530	5,300	1,785,621	892,811

7.6 Media Value Analysis of Brand Exposure

7.6.1 Media Value - Dedicated Coverage

- » The brand exposure of Melbourne and Victoria generated from dedicated coverage returned a Gross Media Value of AU\$16.9 million and Net Media Value worth AU\$4.5 million.
- » Tier 1 territories returned a Gross Media Value of AU\$2.5 million and Net Media Value worth AU\$667,459, 15% of the total Net Value.
- » In Tier 1, the United Kingdom with the most amount of coverage (14 hours and 1 minute), generated the highest Gross and Net Media Values, worth AU\$1.4 million and AU\$363,917 respectively.
- » Tier 2 territories returned a Gross Media Value of AU\$7.7 million and Net Media Value worth AU\$2.0 million, 45% of the total Net Value.
- » Germany, with a significant amount of coverage and the largest cumulative audience, delivered the highest Gross and Net Media Values for all territories, worth AU\$2.7 million and AU\$729,481 respectively, 16% of the total Net Value.
- » Tier 3 territories returned a Gross Media Value of AU\$6.7 million and Net Media Value worth AU\$1.8 million, 40% of the total Net Value.
- » In Tier 3 Switzerland, with three different broadcasters based on linguistic regions (German, French and Italian), delivered the highest Gross and Net Media Values, worth AU\$1.5 million and AU\$415,982 respectively, 9% of the total Net Value.

Figure 32: Coverage, Brand Exposure & Media Value from Dedicated Coverage

Territory	Dedicated Coverage (hh:mm)	Cumulative Audience	Brand Exposure (secs)	Gross Media Value of Brand Exposure (AU\$)	Net Media Value of Brand Exposure (AU\$)
Tier 1					
China	03:08	4,422,000	590	364,493	97,914
New Zealand	12:51	123,838	2,216	50,304	13,326
United Kingdom	14:01	8,723,840	2,607	1,351,918	363,917
USA	07:39	932,000	1,498	711,397	192,301
Tier 1 Total	37:40	14,201,678	6,911	2,478,112	667,459
Tier 2					
Canada	13:41	732,800	2,055	136,645	36,409
Germany	15:23	10,237,503	1,459	2,733,983	729,481
Hong Kong	18:10	89,964	8,567	1,021,066	266,729
India	20:33	334,000	9,809	848,182	221,567
Japan	02:35	3,099,132	276	792,813	209,442
Malaysia	21:31	665,000	9,201	1,044,771	273,125
Singapore	18:10	55,874	8,567	1,021,066	266,729
South Korea	05:15	50,300	971	70,186	19,015
Tier 2 Total	115:19	15,264,573	40,903	7,668,712	2,022,496
Tier 3					
Denmark	19:30	149,365	2,936	555,272	150,343
Finland	21:20	709,705	3,932	363,112	96,206
France	03:10	3,111,700	449	282,292	74,451
Iceland	09:26	15,000	1,901	905	243
Indonesia	02:55	513,000	548	4,315	1,159
Italy	02:38	5,070,300	481	1,460,392	396,960
Netherlands	07:46	2,182,100	1,459	69,151	18,609
Norway	21:33	68,180	4,267	124,334	33,496
Sweden	18:59	234,398	3,636	113,643	30,211
Switzerland	15:04	447,452	2,836	1,548,318	415,982
Taiwan	22:47	367,000	10,970	1,243,470	324,826
Thailand	18:10	23,856	8,041	947,593	247,703
Tier 3 Total	163:22	12,892,055	41,456	6,712,797	1,790,188
Total	316:22	42,358,306	89,270	16,859,621	4,480,143

7.6.2 Media Value - Magazine and News Coverage

- » The brand exposure of Melbourne and Victoria generated from magazine and news coverage from television programmes not devoted wholly to the Australian Grand Prix returned a Gross Media Value of AU\$1.8 million and Net Media Value worth AU\$892,811.
- » Tier 1 territories returned a Gross Media Value of AU\$36,777 and Net Media Value worth AU\$18,388, 2% of the total Net Value.
- » Tier 2 territories returned a Gross Media Value of AU\$1.1 million and Net Media Value worth AU\$540,220, 61% of the total Net Value.
- » Individually, Tier 2 territory Germany delivered the highest Gross and Net Media Values, worth AU\$909,538 and AU\$454,769 respectively. This represented 51% of the total Net Value.
- » Tier 3 territories returned a Gross Media Value of AU\$668,404 and Net Media Value worth AU\$334,202, 37% of the total Net Value.

Figure 33: Coverage, Brand Exposure & Media Value from Magazine and News Coverage

Territory	Magazine and News Coverage (hh:mm)	Cumulative Audience	Brand Exposure (secs)	Gross Media Value of Brand Exposure (AU\$)	Net Media Value of Brand Exposure (AU\$)
Tier 1					
China	01:19	55,154,000	460	28,556	14,278
New Zealand	00:04	11,906	30	1,185	593
United Kingdom	00:24	1,774,100	160	7,036	3,518
USA	-	-	-	-	-
Tier 1 Total	01:48	56,940,006	650	36,777	18,388
Tier 2					
Canada	00:17	332,721	150	95,491	47,746
Germany	05:37	62,039,460	1,280	909,538	454,769
Hong Kong	00:12	70,686	110	39,331	19,666
India	00:07	561,000	30	446	223
Japan	-	-	-	-	-
Malaysia	01:19	759,771	410	10,033	5,016
Singapore	03:02	291,343	730	25,601	12,801
South Korea	-	-	-	-	-
Tier 2 Total	10:37	64,054,981	2,710	1,080,440	540,220
Tier 3					
Denmark	-	-	-	-	-
Finland	00:13	29,730	60	14,998	7,499
France	01:07	33,578,102	590	201,712	100,856
Iceland	-	-	-	-	-
Indonesia	00:21	258,396	120	945	473
Italy	01:54	59,862,902	690	389,627	194,813
Netherlands	00:06	30,108	20	5,142	2,571
Norway	00:01	13,035	30	8,066	4,033
Sweden	-	-	-	-	-
Switzerland	00:00	5,033	10	190	95
Taiwan	00:03	95,759	40	7,021	3,511
Thailand	00:46	2,219,048	380	40,702	20,351
Tier 3 Total	04:35	96,092,113	1,940	668,404	334,202
Total	17:01	217,087,100	5,300	1,785,621	892,811

8.0 EXAMPLES OF BROADCAST EXPOSURE



Picture 1: Graphics - Melbourne



Picture 2: Graphics - Melbourne



Picture 3: Graphics - Melbourne



Picture 4: Graphics - Victoria



Picture 5: Local Area Scenic - Melbourne



Picture 6: Local Area Scenic



Picture 7: Local Area Scenic - Melbourne



Picture 8: Local Area Scenic



Picture 9: Overtrack Banner



Picture 10: Overtrack Banner



Picture 11: Podium Backdrop



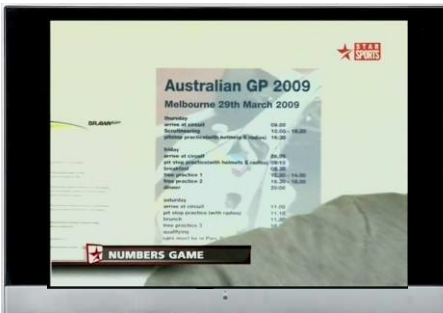
Picture 12: Podium Backdrop



Picture 13: Track Banner



Picture 14: Track Banner



Picture 15: Other



Picture 16: Other

9.0 BROADCAST AND DISTRIBUTION SUMMARY

Region & Territory	Channel	Diffusion ¹	Household Reach	Date	Start Time (hh:mm)	End Time (hh:mm)	Duration (hh:mm)	Type of Coverage	TVR (%)	Audience	Market Share (%)
Asia Pacific											
China	CCTV5	T	233,070,890	28-Mar-09	13:55	15:05	01:09	Live	0.2	2,062,000	1.6
				29-Mar-09	13:52	15:50	01:58	Live	0.2	2,360,000	2.0
							03:08			4,422,000	
Hong Kong	STAR Sports	C/S	879,045	28-Mar-09	13:50	15:30	01:40	Live	0.1	6,426	N/A
				28-Mar-09	20:55	22:25	01:30	Repeat	0.1	6,426	N/A
				29-Mar-09	05:30	07:00	01:30	Repeat	0.1	6,426	N/A
				29-Mar-09	11:30	13:00	01:30	Repeat	0.1	6,426	N/A
				29-Mar-09	13:00	13:49	00:49	Live	0.1	6,426	N/A
				29-Mar-09	13:49	15:50	02:01	Live	0.1	6,426	N/A
				29-Mar-09	15:50	16:30	00:40	Live	0.1	6,426	N/A
				29-Mar-09	21:00	21:49	00:49	Repeat	0.1	6,426	N/A
				29-Mar-09	21:49	23:49	02:00	Repeat	0.1	6,426	N/A
				29-Mar-09	23:49	00:30	00:41	Repeat	0.1	6,426	N/A
				30-Mar-09	15:00	15:43	00:43	Repeat	0.1	6,426	N/A
				30-Mar-09	15:43	17:49	02:06	Repeat	0.1	6,426	N/A
				30-Mar-09	17:49	18:30	00:41	Repeat	0.1	6,426	N/A
				30-Mar-09	23:00	00:30	01:30	Highlights	0.1	6,426	N/A
							18:10			89,964	
India	STAR Sports	C/S	34,281,000	28-Mar-09	11:19	12:56	01:37	Live	0.0	17,000	0.1
				28-Mar-09	19:00	20:28	01:28	Repeat	0.0	25,000	0.1
				29-Mar-09	09:00	10:28	01:28	Repeat	0.0	42,000	0.2
				29-Mar-09	10:29	13:18	02:49	Live	0.0	61,000	0.3
				29-Mar-09	13:20	14:00	00:40	Live	0.0	37,000	0.1
				29-Mar-09	16:30	17:12	00:42	Repeat	0.0	14,000	0.1
				29-Mar-09	17:13	19:17	02:04	Repeat	0.0	29,000	0.1
				29-Mar-09	19:19	19:58	00:39	Repeat	0.0	26,000	0.1
				30-Mar-09	12:00	12:42	00:42	Repeat	0.0	13,000	0.1
				30-Mar-09	12:43	14:47	02:04	Repeat	0.0	17,000	0.1
				30-Mar-09	14:48	15:28	00:40	Repeat	0.0	5,000	0.0
				30-Mar-09	19:30	20:55	01:25	Highlights	0.0	26,000	0.1
				31-Mar-09	14:30	15:55	01:25	Highlights	0.0	13,000	0.1
				2-Apr-09	04:00	05:25	01:25	Highlights	0.0	1,000	0.2
3-Apr-09	10:30	11:55	01:25	Highlights	0.0	8,000	0.1				
							20:33			334,000	
Indonesia	GTV	T	25,033,920	28-Mar-09	13:00	14:06	01:06	Live	0.4	183,000	3.0
				29-Mar-09	13:01	14:50	01:49	Live	0.7	330,000	6.0
							02:55			513,000	
Japan	Fuji TV	T	51,454,483	28-Mar-09	15:50	16:40	00:50	Delayed	1.3	1,299,636	8.0
				29-Mar-09	16:00	17:45	01:45	Delayed	1.8	1,799,496	8.4
							02:35			3,099,132	
Malaysia	NTV7	T	4,175,780	28-Mar-09	13:54	15:03	01:09	Live	0.8	146,000	4.0
				29-Mar-09	13:49	16:01	02:11	Live	1.2	235,000	6.0
							03:21			381,000	
Malaysia	STAR Sports	C/S	1,855,406	28-Mar-09	13:50	15:30	01:40	Live	0.1	24,000	1.0
				28-Mar-09	20:55	22:25	01:30	Repeat	0.1	16,000	0.0
				29-Mar-09	05:30	07:00	01:30	Repeat	0.0	0	0.0
				29-Mar-09	11:30	13:00	01:30	Repeat	0.1	12,000	0.0
				29-Mar-09	13:00	13:49	00:49	Live	0.1	17,000	0.0
				29-Mar-09	13:49	15:50	02:01	Live	0.6	107,000	3.0
				29-Mar-09	15:50	16:30	00:40	Live	0.2	30,000	1.0
				29-Mar-09	21:00	21:49	00:49	Repeat	0.1	11,000	0.0
				29-Mar-09	21:49	23:49	02:00	Repeat	0.1	27,000	0.0
				29-Mar-09	23:49	00:30	00:41	Repeat	0.1	27,000	1.0
				30-Mar-09	15:00	15:43	00:43	Repeat	0.0	0	0.0
				30-Mar-09	15:43	17:49	02:06	Repeat	0.0	1,000	0.0
				30-Mar-09	17:49	18:30	00:41	Repeat	0.0	0	0.0
				30-Mar-09	23:00	00:30	01:30	Highlights	0.1	12,000	0.0
							18:10			284,000	

Region & Territory	Channel	Diffusion ¹	Household Reach	Date	Start Time (hh:mm)	End Time (hh:mm)	Duration (hh:mm)	Type of Coverage	TVR (%)	Audience	Market Share (%)			
New Zealand	SKY Sport 1	C/S	752,405	29-Mar-09	18:03	18:48	00:45	Repeat	0.6	22,200	1.8			
				29-Mar-09	18:55	21:03	02:08	Live	1.7	67,200	4.3			
				30-Mar-09	22:30	23:55	01:24	Highlights	0.0	500	0.1			
											04:18		89,900	
	SKY Sport 2	C/S	752,405	27-Mar-09	14:30	16:05	01:35	Live	0.1	3,200	1.0			
				27-Mar-09	18:25	20:05	01:40	Live	0.0	1,500	0.1			
				28-Mar-09	15:55	17:05	01:10	Live	0.4	15,400	3.0			
				30-Mar-09	18:31	19:56	01:24	Highlights	0.1	5,900	0.4			
											05:50		26,000	
	SKY Sport 3	C/S	752,405	28-Mar-09	18:55	20:08	01:13	Live	0.1	3,969	N/A			
				30-Mar-09	21:30	23:00	01:30	Highlights	0.1	3,969	N/A			
											02:43		7,938	
	Singapore	STAR Sports	C/S	297,447	28-Mar-09	13:50	15:30	01:40	Live	0.1	3,991	N/A		
					28-Mar-09	20:55	22:25	01:30	Repeat	0.1	3,991	N/A		
29-Mar-09					05:30	07:00	01:30	Repeat	0.1	3,991	N/A			
29-Mar-09					11:30	13:00	01:30	Repeat	0.1	3,991	N/A			
29-Mar-09					13:00	13:49	00:49	Live	0.1	3,991	N/A			
29-Mar-09					13:49	15:50	02:01	Live	0.1	3,991	N/A			
29-Mar-09					15:50	16:30	00:40	Live	0.1	3,991	N/A			
29-Mar-09					21:00	21:49	00:49	Repeat	0.1	3,991	N/A			
29-Mar-09					21:49	23:49	02:00	Repeat	0.1	3,991	N/A			
29-Mar-09					23:49	00:30	00:41	Repeat	0.1	3,991	N/A			
30-Mar-09					15:00	15:43	00:43	Repeat	0.1	3,991	N/A			
30-Mar-09					15:43	17:49	02:06	Repeat	0.1	3,991	N/A			
30-Mar-09					17:49	18:30	00:41	Repeat	0.1	3,991	N/A			
30-Mar-09					23:00	00:30	01:30	Highlights	0.1	3,991	N/A			
							18:10		55,874					
South Korea	MBC ESPN	C/S	13,000,000	29-Mar-09	17:03	18:55	01:52	Delayed	0.0	13,900	0.2			
				31-Mar-09	02:00	03:48	01:48	Repeat	0.0	6,600	0.8			
				1-Apr-09	10:09	10:56	00:47	Highlights	0.1	15,100	0.5			
				3-Apr-09	03:09	03:56	00:47	Highlights	0.1	14,700	2.6			
											05:15		50,300	
Taiwan	STAR Sports	C/S	6,035,000	28-Mar-09	13:56	15:04	01:07	Live	0.2	39,000	1.0			
				29-Mar-09	07:00	08:00	01:00	Repeat	0.0	4,000	0.0			
				29-Mar-09	12:00	12:59	00:59	Repeat	0.1	16,000	0.0			
				29-Mar-09	12:59	13:43	00:43	Live	0.2	41,000	1.0			
				29-Mar-09	13:43	15:50	02:07	Live	0.3	71,000	2.0			
				29-Mar-09	15:50	16:30	00:39	Live	0.2	34,000	1.0			
				30-Mar-09	00:04	00:47	00:43	Repeat	0.1	18,000	1.0			
				30-Mar-09	00:47	01:59	01:12	Repeat	0.1	25,000	2.0			
				30-Mar-09	02:00	02:54	00:54	Repeat	0.1	21,000	3.0			
				30-Mar-09	02:54	03:33	00:38	Repeat	0.0	5,000	1.0			
				30-Mar-09	21:00	21:43	00:43	Repeat	0.0	2,000	0.0			
				30-Mar-09	21:43	23:49	02:06	Repeat	0.1	13,000	0.0			
				30-Mar-09	23:49	00:30	00:40	Repeat	0.0	6,000	0.0			
				31-Mar-09	23:00	23:45	00:44	Repeat	0.1	12,000	0.0			
				31-Mar-09	23:45	01:51	02:06	Repeat	0.1	12,000	1.0			
				1-Apr-09	01:51	01:59	00:08	Repeat	0.0	10,000	1.0			
				1-Apr-09	02:00	02:30	00:30	Repeat	0.0	4,000	1.0			
				2-Apr-09	19:30	21:00	01:29	Highlights	0.0	6,000	0.0			
				3-Apr-09	02:00	03:30	01:30	Highlights	0.0	1,000	0.0			
				3-Apr-09	10:48	12:09	01:20	Highlights	0.1	13,000	1.0			
4-Apr-09	00:00	01:30	01:29	Highlights	0.1	14,000	1.0							
							22:47		367,000					
Thailand	STAR Sports	C/S	473,332	28-Mar-09	13:50	15:30	01:40	Live	0.1	1,704	N/A			
				28-Mar-09	20:55	22:25	01:30	Repeat	0.1	1,704	N/A			
				29-Mar-09	05:30	07:00	01:30	Repeat	0.1	1,704	N/A			
				29-Mar-09	11:30	13:00	01:30	Repeat	0.1	1,704	N/A			
				29-Mar-09	13:00	13:49	00:49	Live	0.1	1,704	N/A			
				29-Mar-09	13:49	15:50	02:01	Live	0.1	1,704	N/A			
				29-Mar-09	15:50	16:30	00:40	Live	0.1	1,704	N/A			
				29-Mar-09	21:00	21:49	00:49	Repeat	0.1	1,704	N/A			
				29-Mar-09	21:49	23:49	02:00	Repeat	0.1	1,704	N/A			
				29-Mar-09	23:49	00:30	00:41	Repeat	0.1	1,704	N/A			
				30-Mar-09	15:00	15:43	00:43	Repeat	0.1	1,704	N/A			
				30-Mar-09	15:43	17:49	02:06	Repeat	0.1	1,704	N/A			
				30-Mar-09	17:49	18:30	00:41	Repeat	0.1	1,704	N/A			
				30-Mar-09	23:00	00:30	01:30	Highlights	0.1	1,704	N/A			
											18:10		23,856	

Region & Territory	Channel	Diffusion ¹	Household Reach	Date	Start Time (hh:mm)	End Time (hh:mm)	Duration (hh:mm)	Type of Coverage	TVR (%)	Audience	Market Share (%)			
Europe														
Denmark	TV2 Sport	C/S	2,618,000	27-Mar-09	23:01	00:28	01:27	Delayed	0.2	10,100	0.8			
				28-Mar-09	16:40	17:31	00:51	Delayed	0.4	22,500	2.6			
				29-Mar-09	13:00	14:53	01:53	Delayed	0.6	29,800	5.5			
										04:12				62,400
				27-Mar-09	02:29	04:03	01:34	Live	0.0	200	0.3			
				28-Mar-09	03:59	05:03	01:03	Live	0.0	0	0.1			
	TV3 Plus	C/S	2,618,000	28-Mar-09	06:59	08:21	01:21	Live	0.2	12,400	3.6			
				29-Mar-09	01:55	03:53	01:58	Highlights	0.0	865	1.1			
				29-Mar-09	04:03	04:55	00:51	Highlights	0.1	3,100	2.5			
				29-Mar-09	05:05	05:54	00:48	Highlights	0.0	1,400	1.2			
				29-Mar-09	06:03	06:55	00:51	Highlights	0.1	2,700	2.6			
				29-Mar-09	07:01	10:26	03:25	Live	0.8	44,000	11.2			
29-Mar-09				10:30	13:54	03:23	Repeat	0.4	22,300	4.5				
							15:18				86,965			
Finland	MTV3	DT	2,265,000	28-Mar-09	10:49	11:49	01:00	Repeat	4.0	201,600	28.0			
				29-Mar-09	00:38	01:08	00:30	Highlights	1.0	50,400	12.0			
				29-Mar-09	12:29	13:28	00:59	Highlights	7.0	352,800	31.0			
				30-Mar-09	00:28	01:59	01:31	Repeat	1.0	50,400	14.0			
										04:00				655,200
				27-Mar-09	03:25	05:05	01:40	Live	0.1	4,955	N/A			
MTV3 Max	C/S	430,000	27-Mar-09	05:05	06:45	01:40	Repeat	0.1	4,955	N/A				
			27-Mar-09	07:25	09:05	01:40	Live	0.1	4,955	N/A				
			27-Mar-09	10:35	12:15	01:40	Repeat	0.1	4,955	N/A				
			28-Mar-09	04:55	06:05	01:10	Live	0.1	4,955	N/A				
			28-Mar-09	06:20	07:30	01:10	Repeat	0.1	4,955	N/A				
			28-Mar-09	07:50	09:25	01:35	Live	0.1	4,955	N/A				
			28-Mar-09	09:55	11:30	01:35	Repeat	0.1	4,955	N/A				
			29-Mar-09	08:30	08:50	00:20	Live	0.1	4,955	N/A				
			29-Mar-09	08:50	11:10	02:20	Live	0.1	4,955	N/A				
			29-Mar-09	14:30	17:00	02:30	Repeat	0.1	4,955	N/A				
									17:20				54,505	
			France	TF1	T	25,130,000	28-Mar-09	06:55	08:05	01:09	Live	0.5	282,500	8.9
							29-Mar-09	07:46	07:55	00:09	Live	1.3	756,500	37.9
							29-Mar-09	07:56	09:48	01:52	Live	3.6	2,072,700	46.0
										03:10				3,111,700
Germany	DSF	T	33,100,540	27-Mar-09	06:00	07:47	01:41	Live	0.2	137,064	4.4			
				27-Mar-09	13:58	15:06	01:07	Highlights	0.3	205,480	1.7			
				28-Mar-09	17:02	18:08	01:06	Highlights	0.5	351,364	2.2			
				28-Mar-09	20:27	21:33	01:06	Highlights	0.2	167,557	0.5			
				29-Mar-09	18:00	19:04	01:03	Highlights	0.2	174,481	0.8			
				29-Mar-09	20:29	21:33	01:03	Highlights	0.1	105,989	0.3			
							07:08				1,141,933			
	RTL	T	34,535,130	28-Mar-09	05:59	06:32	00:33	Highlights	0.7	480,365	21.2			
				28-Mar-09	06:36	08:09	01:26	Live	1.5	1,049,280	26.9			
				28-Mar-09	10:44	12:20	01:26	Repeat	1.3	971,883	13.2			
29-Mar-09				06:45	09:39	02:28	Live	3.5	2,499,346	41.4				
29-Mar-09				09:41	10:23	00:41	Highlights	3.2	2,325,669	26.3				
29-Mar-09	13:45	15:44	01:39	Repeat	2.5	1,769,028	12.6							
						08:15				9,095,570				
Iceland	Stöð 2 Sport	DT	20,971	27-Mar-09	20:39	21:07	00:27	Highlights	0.3	1,000	0.7			
				28-Mar-09	03:05	04:11	01:05	Live	0.0	0	3.0			
				28-Mar-09	05:45	07:21	01:36	Live	0.2	0	51.1			
				28-Mar-09	12:12	13:48	01:36	Repeat	1.4	3,000	22.9			
				29-Mar-09	05:30	08:02	02:32	Live	1.5	4,000	82.1			
				29-Mar-09	11:54	14:02	02:08	Repeat	2.9	7,000	17.3			
						09:26				15,000				
Italy	Rai Uno	T	23,105,033	29-Mar-09	07:55	09:39	01:44	Live	7.0	3,977,700	51.9			
							01:44				3,977,700			
	Rai Due	T	23,105,033	29-Mar-09	17:03	17:58	00:54	Highlights	1.9	1,092,600	7.0			
						00:54				1,092,600				

Region & Territory	Channel	Diffusion ¹	Household Reach	Date	Start Time (hh:mm)	End Time (hh:mm)	Duration (hh:mm)	Type of Coverage	TVR (%)	Audience	Market Share (%)														
Netherlands	RTL7	C/S	6,975,270	28-Mar-09	06:55	08:05	01:10	Live	0.5	75,800	10.7														
				28-Mar-09	14:39	15:48	01:09	Repeat	0.9	148,500	12.6														
				29-Mar-09	07:01	07:46	00:45	Live	0.8	126,300	44.4														
				29-Mar-09	07:54	09:31	01:37	Live	2.3	363,200	30.2														
				29-Mar-09	09:51	09:58	00:07	Live	1.6	244,300	15.7														
				29-Mar-09	13:02	13:48	00:46	Repeat	1.9	301,200	16.4														
				29-Mar-09	13:54	15:35	01:41	Repeat	2.5	397,200	22.0														
				29-Mar-09	15:51	15:58	00:07	Repeat	1.3	202,900	10.8														
				29-Mar-09	19:59	20:23	00:24	Highlights	2.1	322,700	5.1														
											07:46			2,182,100											
Norway	SportN	C/S	135,191	29-Mar-09	20:30	22:30	02:00	Repeat	0.1	4,345	N/A														
				30-Mar-09	22:15	00:15	02:00	Repeat	0.1	4,345	N/A														
				3-Apr-09	20:00	22:00	02:00	Repeat	0.1	4,345	N/A														
											06:00			13,035											
				Viasat 4	DT	1,018,500	29-Mar-09	17:00	17:56	00:43	Highlights	0.5	20,385	3.1											
																						00:43			20,385
															Viasat Motor	C/S	135,191	27-Mar-09	02:30	04:00	01:30	Live	0.1	4,345	N/A
																		27-Mar-09	06:30	08:00	01:30	Live	0.1	4,345	N/A
																		28-Mar-09	04:00	05:00	01:00	Live	0.1	4,345	N/A
																		28-Mar-09	06:55	08:15	01:20	Live	0.1	4,345	N/A
29-Mar-09	07:45	10:00	03:00															Live	0.1	4,345	N/A				
																		08:20			21,725				
Viasat Sport	C/S	135,191	29-Mar-09															07:45	10:00	02:15	Live	0.1	4,345	N/A	
			29-Mar-09															13:30	15:45	02:15	Repeat	0.1	4,345	N/A	
			30-Mar-09	14:30	16:30	02:00	Repeat	0.1	4,345	N/A															
										06:30			13,035												
			Sweden	TV6 SE	DT	3,782,310	28-Mar-09	06:55	08:04	01:09	Live	0.4	34,500	7.1											
							29-Mar-09	16:57	17:57	01:00	Delayed	1.3	111,500	7.7											
														02:09			146,000								
							Viasat Motor	C/S	298,361	27-Mar-09	02:30	04:00	01:30	Live	0.1	8,840	N/A								
										27-Mar-09	20:30	22:00	01:30	Repeat	0.1	8,840	N/A								
										27-Mar-09	06:30	08:00	01:30	Live	0.1	8,840	N/A								
27-Mar-09	22:00	23:30								01:30	Repeat	0.1	8,840	N/A											
28-Mar-09	04:00	05:00								01:00	Live	0.1	8,840	N/A											
28-Mar-09	18:30	19:30								01:00	Repeat	0.1	8,840	N/A											
28-Mar-09	06:55	08:15								01:20	Live	0.1	8,840	N/A											
28-Mar-09	20:30	22:00	01:30	Repeat	0.1	8,840				N/A															
29-Mar-09	07:30	10:30	03:00	Live	0.1	8,840				N/A															
29-Mar-09	15:00	18:00	03:00	Repeat	0.1	8,840				N/A															
							16:50			88,398															
Switzerland	SF zwei	DT	2,199,893	28-Mar-09	06:50	08:07	01:11	Live	0.7	32,896	19.8														
				28-Mar-09	16:10	17:09	00:59	Repeat	1.3	66,400	9.1														
				29-Mar-09	07:48	09:48	01:58	Live	3.4	172,538	42.4														
				29-Mar-09	12:14	13:58	01:44	Repeat	1.6	83,068	14.1														
											05:52			354,903											
				RSI LA 2	DT	141,164	28-Mar-09	16:00	17:08	01:08	Delayed	2.2	6,700	13.6											
							28-Mar-09	23:27	00:35	01:08	Repeat	1.6	4,900	8.6											
							29-Mar-09	07:50	09:48	01:56	Live	3.6	11,070	42.1											
							29-Mar-09	17:27	19:23	01:56	Repeat	2.1	6,500	7.0											
														06:09			29,170								
TSR1	DT	711,402	28-Mar-09				06:54	08:03	01:05	Live	0.9	15,008	27.9												
			29-Mar-09				07:49	09:47	01:56	Live	3.0	48,372	42.7												
										03:02			63,380												
			United Kingdom				BBC1	T	25,485,000	28-Mar-09	05:00	07:16	02:16	Live	1.7	975,000	43.6								
										28-Mar-09	13:00	14:15	01:14	Repeat	4.5	2,533,000	27.0								
				29-Mar-09	06:00	09:00				03:00	Live	3.8	2,133,000	59.7											
				29-Mar-09	13:01	15:01				02:00	Repeat	5.1	2,874,000	30.3											
											08:31			8,515,000											
				BBC3	DT	22,650,000				29-Mar-09	19:00	20:00	01:00	Highlights	0.1	52,210	N/A								
																									01:00
BBCi	DT	22,650,000																27-Mar-09	01:25	03:05	01:40	Live	0.1	52,210	N/A
																		27-Mar-08	05:25	07:05	01:40	Live	0.1	52,210	N/A
																		28-Mar-08	02:55	04:05	01:10	Live	0.1	52,210	N/A
																		04:30			156,630				
			Europe Total				127,987,672											148:55			30,949,542				

Region & Territory	Channel	Diffusion ¹	Household Reach	Date	Start Time (hh:mm)	End Time (hh:mm)	Duration (hh:mm)	Type of Coverage	TVR (%)	Audience	Market Share (%)
North America											
Canada	RDS	C/S	2,800,000	28-Mar-09	03:52	05:30	01:38	Live	0.4	29,000	16.0
				28-Mar-09	07:00	08:30	01:30	Repeat	1.1	70,000	7.4
				29-Mar-09	04:00	06:09	02:09	Live	0.7	43,000	31.6
				29-Mar-09	08:00	10:00	02:00	Repeat	3.3	216,000	15.6
										07:17	
	TSN	C/S	8,100,000	28-Mar-09	01:55	03:03	01:08	Live	0.3	85,200	4.1
				28-Mar-09	09:26	10:30	01:04	Repeat	0.2	59,100	1.3
				29-Mar-09	01:55	04:07	02:12	Live	0.3	105,700	5.9
				29-Mar-09	08:00	10:00	02:00	Repeat	0.4	124,800	2.9
										06:24	
USA	Speed	C/S	73,330,000	28-Mar-09	02:00	03:30	01:30	Live	0.1	195,000	0.7
				29-Mar-09	01:00	01:30	00:30	Live	0.0	108,000	0.3
				29-Mar-09	01:30	04:09	02:39	Live	0.1	166,000	0.6
				29-Mar-09	16:00	16:30	00:30	Repeat	0.1	176,000	0.3
				29-Mar-09	16:30	19:00	02:30	Repeat	0.1	287,000	0.5
										07:39	
North America Total			84,230,000				21:20			1,664,800	
Grand Total			581,670,974				316:22			42,358,306	

¹ C/S = Cable/Satellite; DT = Digital Terrestrial; T = Terrestrial

587357954586485
587410362014587
103620145874123
874103620145874
874123014702056
702305698587410
854321098765453
620145874014702
874103620145874
874123014702056
702305698587410
654321098765453
620145874014702
874103620145874
874123014702056
702305698587410
654321098765453
620145874014702
587410362014587
123014702305698
62376459012345
98735725458675
87410362014587
103620145874123
874103620145874
874123014702056

10.0 REPORT AUTHORS

For further information regarding this report, please contact:

Iain Barnett

Managing Director

3 Burlington Lane

London, W4 2TH

Tel: +44 (0) 20 8233 5324

Email: ibarnett@comperioworld.com