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SEPTEMBER 2012

September Quarter

SEPTEMBER QUARTER:
 OVERALL MARKET REMAINS WEAKER OVER THE QUARTERLY PERIOD

Agency Bookings by Network		Jul 09 - Sep 09	Jul 10 - Sep 10	Jul 11 - Sep 11	Jul 12 - Sep 12	\$ Change	% Change
Television	Metropolitan TV	628,670,421	747,538,732	716,180,621	675,086,746	-41,093,875	-5.7%
	Regional TV	128,224,316	154,403,854	146,785,853	145,715,402	-1,070,451	-0.7%
	Subscription TV	70,310,766	87,569,254	93,003,367	97,111,385	4,108,018	4.4%
	Other TV*	4,107,278	3,497,823	4,222,486	4,289,026	66,539	1.6%
	Total	831,312,780	993,009,663	960,192,328	922,202,559	-37,989,769	-4.0%
Newspapers	National	15,255,935	19,665,673	19,001,502	13,974,996	-5,026,505	-26.5%
	Metropolitan	205,361,407	233,215,046	220,254,317	177,065,718	-43,188,599	-19.6%
	Regional	49,069,068	59,708,963	55,825,992	44,252,590	-11,573,402	-20.7%
	Other Newspapers**	31,264,775	36,341,841	36,036,690	30,642,621	-5,394,069	-15.0%
	Total	300,951,185	348,931,523	331,118,501	265,935,926	-65,182,575	-19.7%
Digital	Display	105,858,331	145,715,321	172,727,677	192,461,359	19,733,682	11.4%
	Search	20,993,270	35,119,886	46,189,474	59,111,092	12,921,619	28.0%
	Other Digital***	5,050,431	4,584,015	5,985,256	11,794,400	5,809,144	97.1%
	Total	131,902,033	185,419,222	224,902,407	263,366,851	38,464,444	17.1%
Radio	Metropolitan Radio	77,421,645	89,520,190	87,457,973	81,689,351	-5,768,621	-6.6%
	Other Radio****	18,148,907	21,035,287	23,504,907	22,058,242	-1,446,665	-6.2%
	Regional Radio	16,275,085	20,313,992	20,249,378	19,599,136	-650,242	-3.2%
	Total	111,845,637	130,869,469	131,212,258	123,346,730	-7,865,528	-6.0%
Magazines	Consumer	91,377,108	95,907,836	84,489,596	69,206,112	-15,283,483	-18.1%
	Newspaper Mags	25,580,590	29,045,002	28,476,788	22,662,299	-5,814,489	-20.4%
	Total	116,957,698	124,952,838	112,966,384	91,868,411	-21,097,973	-18.7%
Outdoor	103,846,001	143,524,847	142,487,391	149,169,270	6,681,879	4.7%	
Cinema	6,819,199	10,671,740	11,424,468	16,807,615	5,383,147	47.1%	
Other	5,817,284	5,115,535	8,949,678	8,574,494	-375,184	-4.2%	
Grand Total	1,609,451,818	1,942,494,835	1,923,253,414	1,841,271,856	-81,981,558	-4.3%	

SMI Financial Booking Data at October 11, 2012

* Other TV includes Community TV and all production bookings

** Other Newspapers includes bookings to the Community, Street, Indigenous, Non-English speaking, Government, Senior and Production sub-types

*** Other Digital includes all Advertising, SEM and Production bookings

**** Other Radio includes all production bookings and bookings to the Other Radio sub-type (e.g. ATM, MCM Entertainment etc)

Calendar Year-to-Date

CALENDAR YEAR-TO-DATE:
DIGITAL DELIVERS THE STRONGEST CALENDAR YEAR GAINS

Agency Bookings by Network		Jan 09 - Sep 09	Jan 10 - Sep 10	Jan 11 - Sep 11	Jan 12 - Sep 12	\$ Change	% Change
Television	Metropolitan TV	1,684,125,824	2,001,540,205	1,969,266,582	1,891,037,365	-78,229,217	-4.0%
	Regional TV	349,446,555	415,003,929	411,859,464	421,718,970	9,859,506	2.4%
	Subscription TV	189,785,446	230,049,633	248,516,505	279,469,717	30,953,213	12.5%
	Other TV*	9,311,344	13,716,097	11,799,046	13,371,359	1,572,313	13.3%
	Total	2,232,669,168	2,660,309,863	2,641,441,597	2,605,597,411	-35,844,185	-1.4%
Newspapers	National	43,232,953	56,485,787	50,651,871	40,829,348	-9,822,523	-19.4%
	Metropolitan	620,885,408	688,025,153	637,929,513	550,796,060	-87,133,453	-13.7%
	Regional	152,065,219	173,538,910	162,200,135	146,837,007	-15,363,128	-9.5%
	Other Newspapers**	93,650,984	103,410,791	107,656,227	96,391,697	-11,264,530	-10.5%
	Total	909,834,564	1,021,460,641	958,437,745	834,854,111	-123,583,634	-12.9%
Digital	Display	302,173,499	414,747,405	479,421,141	558,360,774	78,939,633	16.5%
	Search	59,528,112	95,339,674	133,117,545	174,844,517	41,726,972	31.3%
	Other Digital***	15,670,022	13,566,727	14,134,814	25,799,712	11,664,898	82.5%
	Total	377,371,633	523,653,806	626,673,500	759,005,003	132,331,502	21.1%
Radio	Metropolitan Radio	241,252,938	257,146,532	257,135,928	251,605,332	-5,530,596	-2.2%
	Other Radio****	56,882,642	63,053,820	66,844,490	68,291,363	1,446,873	2.2%
	Regional Radio	55,459,283	61,840,770	61,644,890	66,916,607	5,271,717	8.6%
	Total	353,594,863	382,041,122	385,625,308	386,813,301	1,187,994	0.3%
Magazines	Consumer	252,894,687	258,116,456	243,006,352	205,654,491	-37,351,860	-15.4%
	Newspaper Mags	78,725,599	85,537,483	73,602,524	65,635,643	-7,966,881	-10.8%
	Total	331,620,286	343,653,940	316,608,876	271,290,134	-45,318,741	-14.3%
Outdoor	324,419,055	413,511,011	441,569,633	456,853,235	15,283,602	3.5%	
Cinema	26,846,098	34,325,149	34,249,919	40,824,812	6,574,893	19.2%	
Other	14,317,340	16,472,802	21,515,343	27,153,536	5,638,193	26.2%	
Grand Total	4,570,673,007	5,395,428,333	5,426,121,920	5,382,391,544	-43,730,376	-0.8%	

SMI Financial Booking Data at October 11, 2012

* Other TV includes Community TV and all production bookings

** Other Newspapers includes bookings to the Community, Street, Indigenous, Non-English speaking, Government, Senior and Production sub-types

*** Other Digital includes all Advertising, SEM and Production bookings

**** Other Radio includes all production bookings and bookings to the Other Radio sub-type (e.g. ATN, MCM Entertainment etc)

Major Digital Publishers: September 2012

SEPTEMBER 2012*:

FAIRFAX, YAHOO!7 AND TELSTRA REPORT DOUBLE DIGIT GROWTH

Agency Booking by Network						
	Sep 2009	Sep 2010	Sep 2011	Sep 2012	\$ Change	% Change
Fairfax Digital	4,875,935	6,296,461	7,395,872	8,200,387	804,515	10.9%
Mi9**	6,860,192	9,084,602	8,162,382	8,181,353	18,971	0.2%
Yahoo!7	2,721,971	5,141,881	5,058,755	6,054,857	996,102	19.7%
News Digital	4,304,044	5,511,183	5,315,236	5,239,047	-76,189	-1.4%
Telstra	2,692,202	2,617,645	2,035,577	2,481,034	445,457	21.9%
Grand Total	21,454,343	28,651,772	27,967,823	30,156,679	2,188,856	7.8%

SMI Financial Booking Data at October 11, 2012
 *Excludes Search and SEM Bookings
 **Includes Microsoft Media bookings

Major Digital Publishers: September Quarter

THREE MONTH AVERAGE:

AGENCIES GROW MAJOR PUBLISHER BOOKINGS ON AVERAGE BY 4.1%

Agency Booking by Network						
	Jul 09 - Sep 09	Jul 10 - Sep 10	Jul 11 - Sep 11	Jul 12 - Sep 12	\$ Change	% Change
Mi9**	4,956,483	6,160,359	7,218,328	7,578,989	360,662	4.8%
Fairfax Digital	3,958,751	5,200,078	5,381,388	5,421,213	39,826	0.7%
Yahoo!7	6,792,529	8,733,847	8,023,166	8,290,432	267,265	3.2%
News Digital	2,711,438	4,896,412	5,409,668	5,591,323	181,654	3.2%
Telstra	2,614,818	2,494,366	1,873,667	2,208,136	334,470	15.1%
Grand Total	21,034,018	27,485,062	27,906,217	29,090,093	1,183,876	4.1%

SMI Financial Booking Data at October 11, 2012
 *Excludes Search and SEM Bookings
 **Includes Microsoft Media bookings

Major Digital Publishers: Calendar Year-to-Date

CALENDAR YEAR-TO-DATE:

MAJOR PUBLISHERS NEAR DOUBLE DIGIT CALENDAR YEAR GAINS

Agency Booking by Network						
	Jan 09 - Sep 09	Jan 10 - Sep 10	Jan 11 - Sep 11	Jan 12 - Sep 12	\$ Change	% Change
Mi9**	62,389,907	71,412,961	72,398,127	72,667,057	268,930	0.4%
Fairfax Digital	45,373,337	53,548,480	57,753,182	66,018,567	8,265,385	14.3%
Yahoo!7	24,533,125	40,799,097	43,829,626	52,364,656	8,535,029	19.5%
News Digital	32,482,637	46,883,369	44,825,498	47,133,092	2,307,594	5.1%
Telstra	21,787,410	22,303,878	17,353,266	20,695,034	3,341,767	19.3%
Grand Total	186,566,416	234,947,786	236,159,699	258,878,405	22,718,706	9.6%

SMI Financial Booking Data at October 11, 2012
 *Excludes Search and SEM Bookings
 **Includes Microsoft Media bookings

The Top 20 Digital Networks: Calendar Year-to-Date

CALENDAR YEAR-TO-DATE:

GOOGLE CONTINUES AS THE DIGITAL MEDIA'S FASTEST GROWING BUSINESS

Agency Booking by Network						
	Jan 09 - Sep 09	Jan 10 - Sep 10	Jan 11 - Sep 11	Jan 12 - Sep 12	\$ Change	% Change
Google	58,264,777	95,557,971	140,655,979	193,280,019	52,624,040	37.4%
Independent	36,999,426	44,559,331	52,085,760	79,966,325	27,880,565	53.5%
Mi9	62,389,907	71,412,961	72,398,127	72,655,317	257,190	0.4%
Fairfax Digital	45,373,337	53,548,480	57,753,182	66,018,567	8,265,385	14.3%
Yahoo!7	29,672,158	46,237,511	49,952,405	58,934,178	8,981,773	18.0%
News Digital	32,494,063	46,889,241	44,825,498	47,133,092	2,307,594	5.1%
Car Sales	6,475,275	15,911,659	24,288,248	33,494,699	9,206,452	37.9%
Demand Side Platforms			3,422,912	25,881,371	22,458,459	656.1%
Adconion	19,073,427	26,397,961	29,112,556	24,539,063	-4,573,494	-15.7%
Facebook	2,690,002	10,274,378	19,754,071	23,781,799	4,027,728	20.4%
Telstra Advertising Network	21,939,680	22,504,496	17,605,739	20,821,174	3,215,434	18.3%
Realestate.com.au	10,278,040	13,559,751	15,687,217	20,806,374	5,119,158	32.6%
SheSpot	2,407,861	5,673,420	9,963,691	9,048,737	-914,954	-9.2%
Tribal Fusion	1,017,622	2,313,404	4,338,552	7,332,008	2,993,457	69.0%
Ad2One	3,864,136	6,552,366	6,972,642	6,424,833	-547,809	-7.9%
MCN Online	4,792,006	6,374,333	5,534,172	6,212,665	678,493	12.3%
Ten Network	2,803,025	5,975,921	10,076,865	6,208,338	-3,868,527	-38.4%
The Video Network		110,928	4,949,653	5,310,882	361,228	7.3%
MCM Entertainment	1,410,488	1,811,734	2,854,877	5,257,062	2,402,185	84.1%
Digital Perf Group	5,838,695	5,601,793	5,426,740	4,345,854	-1,080,886	-19.9%
The Top 20 Total:	347,783,924	481,267,639	577,658,886	717,452,358	139,793,472	19.5%
Grand Total	377,371,633	523,653,806	626,673,500	759,005,003	132,331,502	21.1%

SMI Financial Booking Data at October 11, 2012