

AUSTRALIAN MULTI-SCREEN REPORT

TRENDS IN VIDEO VIEWERSHIP BEYOND
CONVENTIONAL TELEVISION SETS

QUARTER 2
2013



oztam
measuring audiences

REGIONAL
TAM
TELEVISION AUDIENCE
MEASUREMENT

nielsen

VIDEO CONTENT ACROSS MULTIPLE SCREENS

The latest edition of the Australian Multi-Screen Report (Q2 2013) shows continued uptake of screen types, with tablets now present in a third of homes and almost two thirds of people 16+ having a smart phone.

This is providing Australians with additional options to consume broadcast television and other video. Australians spend on average 96 hours and 37 minutes per month watching TV on a conventional set. Viewing of video on a PC/laptop is at 6 hours and 26 minutes per month, followed by mobile phones (1:20) and tablets (0:50).

As the penetration of various screens increases, so do the quality, power and functionality of these technologies.

Almost nine in ten homes now have all their working TVs capable of receiving Digital Terrestrial Television (DTT); more than one in five have internet-capable TVs; and more than half have PVRs. In addition, screen sizes continue to increase and screen resolutions are also evolving with the introduction of ultra high definition (4K) TVs.

Just over three years ago, tablet computers launched in Australia and are now available from a range of manufacturers, in a variety of sizes, capabilities and screen resolutions.

Of course, the tablet followed the introduction of touch screen smart phones by only a few years.

The latest generation smart phones have dramatically enhanced power, screen size, resolution and capabilities; larger screen size in particular is starting to blur the line between smart phone and tablet.



USING MULTIPLE SCREENS

A year ago (Q2 2012) the Australian Multi-Screen Report illustrated the reach of traditional television and online video viewing, both of which peak during the traditional evening 'prime time'.

This report provides a first look at the average 'shape of the day' for Total Television Use. The chart highlights the levels of screen activity being done throughout the day, whether this is Live viewing, Playback viewing (within seven days of broadcast) or other TV screen use activity.



TECHNOLOGY PENETRATION

Q2 2011 Q2 2012 Q2 2013



DTT: PENETRATION WITHIN TV HOUSEHOLDS

92% 97% 99%



COMPLETELY DTT: PENETRATION WITHIN TV HOUSEHOLDS

61% 77% 88%



PVR: PENETRATION WITHIN TV HOUSEHOLDS

40% 49% 54%



INTERNET CONNECTION: HOUSEHOLD PENETRATION

77% 78% 80%



TABLETS: HOUSEHOLD PENETRATION

N.A 19% 33%



INTERNET CAPABLE TV IN HOUSEHOLD

N.A 16% 22%



SMARTPHONES: 16+ MOBILE PHONE USERS

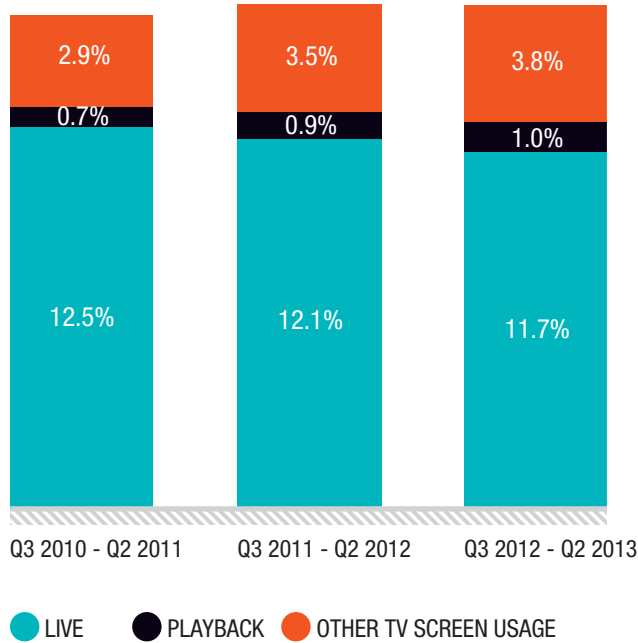
46% 52% 65%

VIDEO VIEWING, AVERAGE TIME SPENT PER MONTH, TV / PC / MOBILE PHONE / TABLET

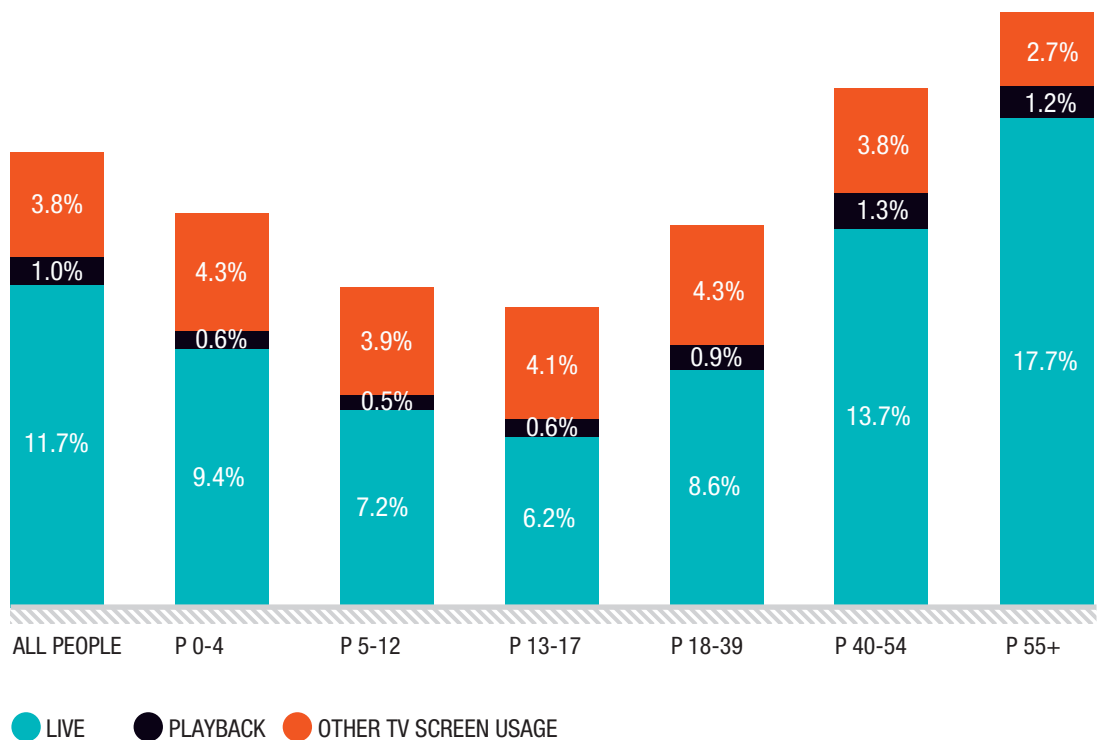


TOTAL TV SCREEN USAGE

TARP - TOTAL INDIVIDUALS

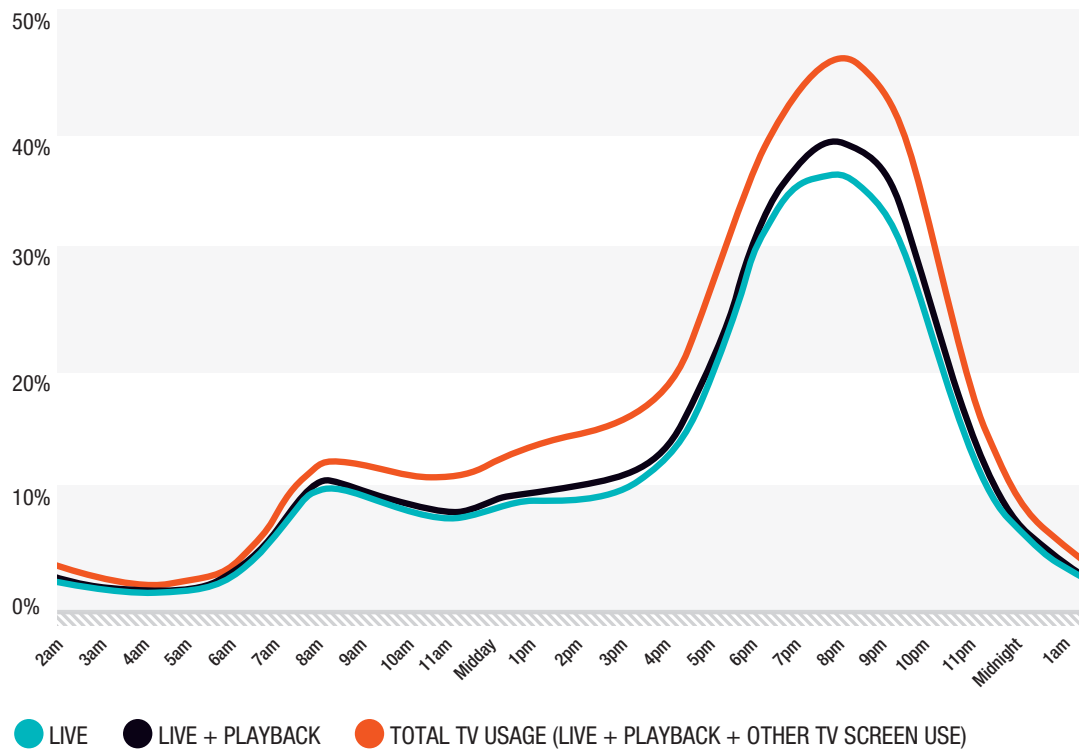


TARP BY DEMOGRAPHICS - Q3 2012 TO Q2 2013



TOTAL TV SCREEN USAGE - SHAPE OF THE DAY

TARP - ALL WEEK (SUNDAY TO SATURDAY)

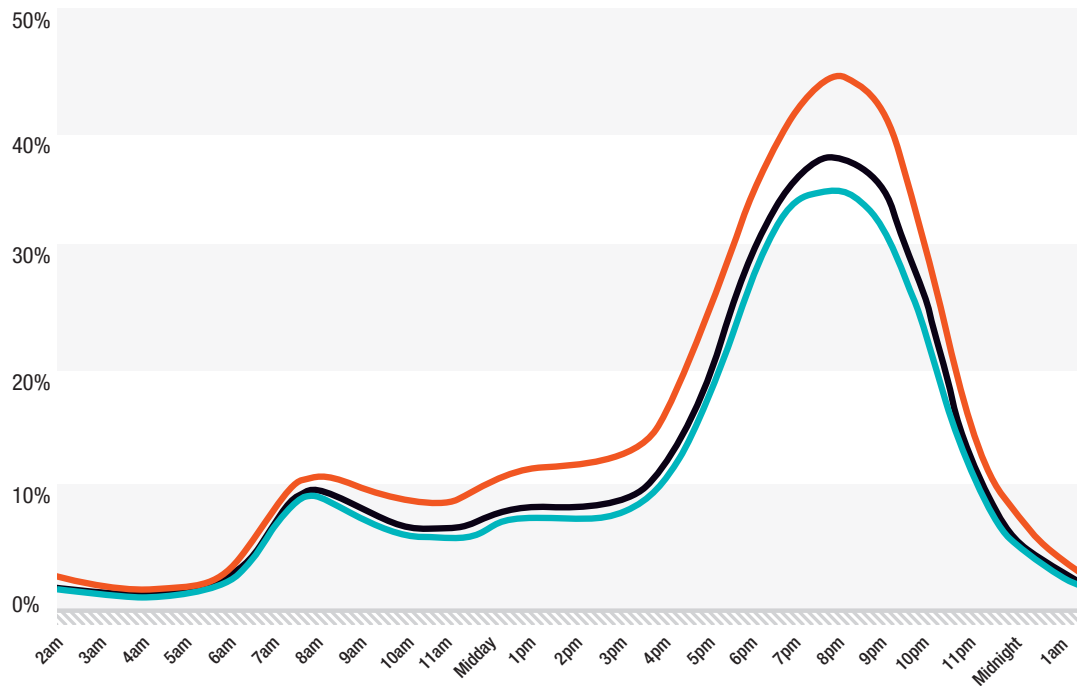


While overall Total TV Usage averages out at 16.5 TARP across the whole day, as we can see in the above chart (based on Period 7 2013) television use builds through the day to the evening peak.

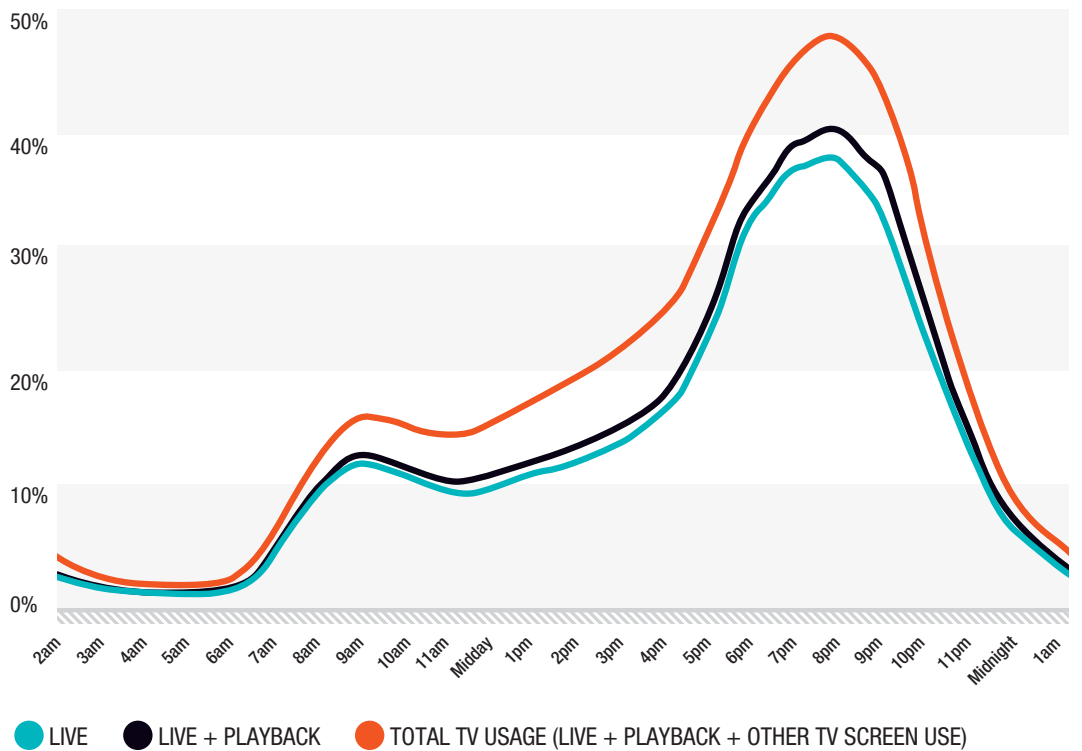
Playback viewing and Other TV screen use (e.g. using the TV for non-broadcast viewing purposes such as browsing the internet, watching DVDs, gaming, or playing back recorded broadcast content beyond the seven-day Consolidated viewing window) rises steadily through the day to the prime time period, with Live viewing driving the shape of early morning TV use in particular.



TARP - WEEKDAY



TARP - WEEKEND



Total TV Use peaks during the evening on both the weekdays and the weekend. However, weekends from mornings onwards

have a higher level of Total TV Use across the day relative to weekdays, including a larger amount of Other TV screen usage.

KEY OBSERVATIONS

TABLE 1: TECHNOLOGY PENETRATION

	Q2 2012	Q3 2012	Q4 2012	Q1 2013	Q2 2013
Digital terrestrial television (DTT): Penetration within TV households ¹	97%	97%	98%	98%	99%
Completely DTT: Penetration within TV households (Homes capable of receiving DTT on each working TV within the home)	77%	79%	81%	84%	88%
Personal video recorder (PVR): Penetration within TV households	49%	50%	52%	53%	54%
Internet Connection: Household penetration ²	78%	78%	79%	80%	80%
Tablets: Household penetration	19%	22%	27%	31%	33%
Internet Capable TV in Home	16%	18%	20%	21%	22%
Smartphones: People 16+ ³	52%	56%	59%	61%	65%

TABLE 2: MONTHLY TIME SPENT (HH:MM)

	Q2 2012	Q3 2012	Q4 2012	Q1 2013	Q2 2013
Watching TV in the home ⁴	99:09	99:54	91:05	92:39	96:37
Watching Playback TV	7:13	6:46	6:30	6:48	7:46
Using Internet on a PC ⁵	47:24	48:00	50:42	51:47	-
Online time spent per person ⁶	-	-	-	-	38:41
Watch video on PC/Laptop	3:58	3:54	-	-	-
Watch video on Internet (Video Census) ⁷	-	-	5:54	6:43	6:26
Watching online video on a mobile phone ⁸	N.A.	N.A.	1:20	N.A.	N.A.
Watching online video on a tablet	N.A.	N.A.	0:50	N.A.	N.A.

¹ Source: DTT, PVR estimates are based on install levels from the Combined OzTAM Metro and Regional TAM panels as at last date of each period.

² Source: Estimates for Internet connection, Tablet household penetration and Internet capable TV in home from combined OzTAM Metro and Regional TAM quarterly Establishment Surveys (ES). Based on landline CATI ES. Estimate for Internet Connect TV in Home refers to the capability to be internet capable, whether connected or not.

³ Sources: Nielsen Australian Online Consumer (AOC) Report of online consumers aged 16+ (Q1 2011), The Nielsen Telstra Smartphone Index Report of mobile users aged 16+ Q2 2011 & Q3 2011 and Nielsen Consumer & Media View national population aged 16+ (Q4 2011 onwards)

⁴ Source: Combined OzTAM Metro and Regional TAM databases with overlap homes de-duplicated. Average time spent viewing (ATV 0200-2600). 'Watching TV' and 'Watching Playback TV' are both based on Consolidated data. Playback viewing is up to 7 days after broadcast. Please note television viewing is seasonal, with people watching more television in the winter months and with the end of daylight saving time

⁵ Source: Nielsen NetView (Q1-Q3 2011) and Nielsen Online Ratings (Q4 2011 onwards). Using Internet on PC excludes adult content and applications. Estimate is the average of the 3 months within the calendar quarter. Figures are National and for people 2+. Home and Work panel only. Due to a change in methodology comparisons prior to Q4 2011 cannot be made.

⁶ Source: Nielsen Online Ratings from Q2 2013 onwards. Estimate is the average of the 3 months within the calendar quarter apart from Q2 2013 which is an estimate of May-June 2013 only. Figures are National and for people 2+.

⁷ Source: Nielsen VideoCensus (Q4 2012). Using Internet on PC excludes adult content and applications. Estimate is the average of November and December 2012. Figures are National and for people 2+. Home and Work panel only. Due to a change in methodology comparisons prior to Q4 2012 cannot be made.

⁸ Mobile and tablet video source: Nielsen Australian Connected Consumers report for respondents aged 16 years and over (inclusive of total online population regardless of device ownership or video consumption). Monthly estimate based on reported weekly time spent multiplied by average number of weeks in a month (4.3). Figure relates to online video only.

TECHNOLOGY PENETRATION

TABLE 3: OVERALL USAGE (000s), MONTHLY REACH

	Q2 2012	Q3 2012	Q4 2012	Q1 2013	Q2 2013
Watching TV in the home ⁹	21,683	21,682	21,653	21,651	21,751
Watching Playback TV	9,631	9,706	9,646	9,595	10,092
Using Internet on a PC ¹⁰	13,116	12,874	14,703	14,908	-
Online time spent per person ¹¹	-	-	-	-	16,979
Watch video on PC/Laptop ¹²	9,897	9,947			
Watch video on Internet (Video Census) ¹³	-	-	11,103	11,412	12,055
Owning/using a mobile phone ¹⁴	17,442	17,445	17,365	17,477	17,530
Watching online video on mobile phone ¹⁵	N.A.	N.A.	2,369	N.A.	N.A.
Watching online video on tablet	N.A.	N.A.	1,185	N.A.	N.A.

TABLE 4: A MONTH IN THE LIFE – Q2 2013

	KIDS ¹⁶	TEENS ¹⁷	P18-24	P25-34	P35-49	P50-64	P65+	ALL PEOPLE ¹⁸
Watching TV in the home ¹⁹	66:46	49:45	47:18	81:24	103:07	128:52	151:20	96:37
Q2 2012	68:30	55:53	50:53	84:34	106:00	131:36	153:05	99:09
Watching Playback TV	4:20	4:57	4:52	7:31	9:50	10:20	8:54	7:46
Q2 2012	3:55	4:25	4:53	7:29	9:15	9:24	7:51	7:13
Online time spent per person ²⁰	6:34	14:47	23:07	43:53	43:42	40:53	25:17	38:41
Watch video on Internet ²¹	4:37	7:18	13:01	8:39	6:02	3:39	2:06	6:26
Watching online video on a mobile phone ²² (Q4 2012)	N.A.	4:24	2:23	2:54	1:24	0:15	0:01	1:20
Watching online video on a tablet (Q4 2012)	N.A.	1:26	0:46	1:32	0:59	0:34	0:20	0:50

⁹ Source: Combined OzTAM Metro and Regional TAM databases with overlap homes de-duplicated. 'Watching TV' and 'Watching Playback TV' are both based on consolidated data (0200-2600). Playback viewing is up to 7 days after broadcast.

¹⁰ Source: Nielsen NetView (Q1-Q3'11) and Nielsen Online Ratings (Q4'11 onwards) – Internet activity (using and watching) excludes adult content and application. National figures for people 2+.

¹¹ Source: Nielsen Online Ratings from Q2 2013 onwards. Estimate is the average of the 3 months within the calendar quarter apart from Q2 2013 which is an estimate of May-June 2013 only. Figures are National and for people 2+.

¹² Source: Nielsen Online Ratings from Q2 2013 onwards. Estimate is the average of the 3 months within the calendar quarter apart from Q2 2013 which is an estimate of May-June 2013 only. Figures are National and for people 2+.

¹³ Source: Nielsen VideoCensus (Q4 2012). Using Internet on PC excludes adult content and applications. Estimate is the average of November and December 2012. Figures are National and for people 2+. Home and Work panel only. Due to a change in methodology comparisons prior to Q4 2012 cannot be made.

¹⁴ Mobile phone ownership and usage sourced from Nielsen Consumer & Media View (people aged 14+).

¹⁵ Source: Nielsen Australian Connected Consumers report from 2012-2013 (February 2013 edition) - national figures produced annually citing 16% of the online population aged 16+ for mobile video and 8% for tablet video. Audience figure calculated using national online active audience of 14,808,513 from Nielsen Online Ratings (January 2013).

¹⁶ Combined Metro OzTAM and Regional TAM data defines 'Kids' aged 0-12 and Nielsen Netview aged 2-11.

¹⁷ Combined Metro OzTAM and Regional TAM data defines 'Teens' aged 13-17, Nielsen Netview aged 12-17 and Nielsen AOC aged 16-17.

¹⁸ Mobile phone population based on people aged 16+.

¹⁹ Source: Combined OzTAM Metro and Regional TAM databases with overlap homes de-duplicated. 'Watching TV' and 'Watching Playback TV' are both based on consolidated data (0200-2600). Playback viewing is up to 7 days after broadcast.

²⁰ Source: Nielsen Online Ratings from Q2 2013 onwards. Estimate is the average of the 3 months within the calendar quarter apart from Q2 2013 which is an estimate of May-June 2013 only. Figures are National and for people 2+.

²¹ Source: Nielsen VideoCensus (Q4 2012). Using Internet on PC excludes adult content and applications. Estimate is the average of November and December 2012. Figures are National and for people 2+. Home and Work panel only. Due to a change in methodology comparisons prior to Q4 2012 cannot be made.

²² Mobile video source: Nielsen Australian Connected Consumers report for respondents aged 16 years and over. Monthly estimate based on reported weekly time spent multiplied by average number of weeks in a month (4.3).

TABLE 4A: A MONTH IN THE LIFE – BY QUARTER

KIDS	Q2 2012	Q3 2012	Q4 2012	Q1 2013	Q2 2013
Watching TV in the home ¹⁹	68:30	70:10	62:55	61:37	66:46
Watching Playback TV	3:55	4:06	3:55	3:56	4:20
Using the Internet on a PC ¹⁰	7:34	8:12	8:35	9:27	-
Online time spent per person ²⁰	-	-	-	-	6:34
Watching video on PC/Laptop	2:10	2:19	-	-	-
Watching video on Internet (VideoCensus) ²¹	-	-	4:52	4:49	4:37
Watching online video on a mobile phone (Q4 2012) ²²	N.A.	N.A.	N.A.	N.A.	N.A.
Watching online video on a tablet (Q4 2012)	N.A.	N.A.	N.A.	N.A.	N.A.

TEENS	Q2 2012	Q3 2012	Q4 2012	Q1 2013	Q2 2013
Watching TV in the home ¹⁹	55:53	58:21	51:14	47:25	49:45
Watching Playback TV	4:25	4:15	4:22	4:11	4:57
Using the Internet on a PC ¹⁰	13:57	16:42	19:08	15:15	-
Online time spent per person ²⁰	-	-	-	-	14:47
Watching video on PC/Laptop	3:19	3:12	-	-	-
Watching video on Internet (VideoCensus) ²¹	-	-	6:40	6:56	7:18
Watching online video on a mobile phone (Q4 2012) ²²	1:29	1:29	4:24	N.A.	N.A.
Watching online video on a tablet (Q4 2012)	N.A.	N.A.	1:26	N.A.	N.A.

P18-24	Q2 2012	Q3 2012	Q4 2012	Q1 2013	Q2 2013
Watching TV in the home ¹⁹	50:53	49:55	44:08	44:30	47:18
Watching Playback TV	4:53	4:22	3:59	4:09	4:52
Using the Internet on a PC ¹⁰	35:45	38:34	41:17	45:41	-
Online time spent per person ²⁰	-	-	-	-	23:07
Watching video on PC/Laptop	6:25	6:05	-	-	-
Watching video on Internet (VideoCensus) ²¹	-	-	11:36	13:16	13:01
Watching online video on a mobile phone (Q4 2012) ²²	2:54	2:54	2:23	N.A.	N.A.
Watching online video on a tablet (Q4 2012)	N.A.	N.A.	0:46	N.A.	N.A.

P25-34	Q2 2012	Q3 2012	Q4 2012	Q1 2013	Q2 2013
Watching TV in the home ¹⁹	84:34	84:25	73:31	76:50	81:24
Watching Playback TV	7:29	6:41	5:59	6:06	7:31
Using the Internet on a PC ¹⁰	60:47	61:18	61:55	62:02	-
Online time spent per person ²⁰	-	-	-	-	43:53
Watching video on PC/Laptop	5:08	5:10	-	-	-
Watching video on Internet (VideoCensus) ²¹	-	-	8:19	8:20	8:39
Watching online video on a mobile phone (Q4 2012) ²²	2:55	2:55	2:54	N.A.	N.A.
Watching online video on a tablet (Q4 2012)	N.A.	N.A.	1:32	N.A.	N.A.

P35-49	Q2 2012	Q3 2012	Q4 2012	Q1 2013	Q2 2013
Watching TV in the home ¹⁹	106:00	107:23	97:19	97:09	103:07
Watching Playback TV	9:15	8:25	8:21	8:41	9:50
Using the Internet on a PC ¹⁰	57:34	56:22	59:23	59:47	-
Online time spent per person ²⁰	-	-	-	-	43:42
Watching video on PC/Laptop	3:59	3:50	-	-	-
Watching video on Internet (VideoCensus) ²¹	-	-	5:01	6:14	6:02
Watching online video on a mobile phone (Q4 2012) ²²	0:57	0:57	1:24	N.A.	N.A.
Watching online video on a tablet (Q4 2012)	N.A.	N.A.	0:59	N.A.	N.A.

P50-64	Q2 2012	Q3 2012	Q4 2012	Q1 2013	Q2 2013
Watching TV in the home ¹⁹	131:36	132:37	121:22	125:13	128:52
Watching Playback TV	9:24	8:44	8:22	9:10	10:20
Using the Internet on a PC ¹⁰	54:34	54:43	59:01	60:14	-
Online time spent per person ²⁰	-	-	-	-	40:53
Watching video on PC/Laptop	3:19	3:06	-	-	-
Watching video on Internet (VideoCensus) ²¹	-	-	3:21	4:06	3:39
Watching online video on a mobile phone (Q4 2012) ²²	0:18	0:18	0:15	N.A.	N.A.
Watching online video on a tablet (Q4 2012)	N.A.	N.A.	0:34	N.A.	N.A.

P65+	Q2 2012	Q3 2012	Q4 2012	Q1 2013	Q2 2013
Watching TV in the home ¹⁹	153:05	152:47	146:36	150:25	151:20
Watching Playback TV	7:51	7:51	7:42	8:04	8:54
Using the Internet on a PC ¹⁰	32:40	33:42	35:50	36:44	-
Online time spent per person ²⁰	-	-	-	-	25:17
Watching video on PC/Laptop	1:33	1:44	-	-	-
Watching video on Internet (VideoCensus) ²¹	-	-	1:48	1:52	2:06
Watching online video on a mobile phone (Q4 2012) ²²	0:00	0:00	0:01	N.A.	N.A.
Watching online video on a tablet (Q4 2012)	N.A.	N.A.	0:20	N.A.	N.A.

ALL PEOPLE	Q2 2012	Q3 2012	Q4 2012	Q1 2013	Q2 2013
Watching TV in the home ¹⁹	99:09	99:54	91:05	92:39	96:37
Watching Playback TV	7:13	6:46	6:30	6:48	7:46
Using the Internet on a PC ¹⁰	47:24	48:00	50:42	51:47	-
Online time spent per person ²⁰	-	-	-	-	38:41
Watching video on PC/Laptop	3:58	3:55	-	-	-
Watching video on Internet (VideoCensus) ²¹	-	-	5:54	6:43	6:26
Watching online video on a mobile phone (Q4 2012) ²²	1:20	1:20	1:20	N.A.	N.A.
Watching online video on a tablet (Q4 2012)	N.A.	N.A.	0:50	N.A.	N.A.

TABLE 5: VIDEO AUDIENCE COMPOSITION (BY AGE AND GENDER) – Q2 2013

	KIDS	TEENS	P18-24	P25-34	P35-49	P50-64	P65+	FEMALES	MALES
On Traditional TV ²³	11%	3%	5%	12%	22%	24%	22%	53%	47%
Q2 2012	11%	4%	5%	13%	22%	24%	21%	53%	47%
On Internet (VideoCensus) ²⁴	2%	4%	13%	19%	29%	21%	13%	50%	50%
On Mobile Phones ²⁵ (Q4 2012)	N.A.	6%	23%	37%	27%	6%	1%	42%	58%
On Tablet (Q4 2012)	N.A.	2%	13%	27%	34%	18%	7%	46%	54%

²³ Source: Combined OzTAM Metro and Regional TAM databases with overlap homes de-duplicated. 'Watching TV' and 'Watching Playback TV' are both based on consolidated data (0200-2600).

²⁴ Source: Nielsen VideoCensus (Q4 2012). Using Internet on PC excludes adult content and applications. Estimate is the average of November and December 2012. Figures are National and for people 2+. Home and Work panel only. Due to a change in methodology comparisons prior to Q4 2012 cannot be made.

²⁵ Nielsen Australian Online Consumer (AOC) Report – audience profile is based on all mobile phone users aged 16+ in Australia. National figures only produced annually. Q1-Q3 2011 figures from 2010-2011 AOC Report (February 2011 edition). Q4 2011 figures onwards from 2011-2012 AOC Report (February 2012 edition).

EXPLANATORY NOTES

- Panel install incidence rates for DTT and PVR are based on combined OzTAM Metro and Regional TAM panels as at last date of each period (Q1=end of P4, Q2=end of P7, Q3=end of P10, Q4=end of P13).
- Quarterly Establishment Survey waves are conducted within standard calendar quarters.
- National Establishment Survey (ES) estimates are based on combined OzTAM Metro and Regional TAM quarterly waves. Quarterly ES waves are conducted within standard calendar quarters.
- Playback mode is defined as television broadcast content recorded and viewed (played back) within seven days of the original broadcast time.
- Other screen usage is TV screen usage that excludes live and playback viewing of broadcast television within seven days of the original broadcast time. It can include non-broadcast activities such as gaming, online activity on the TV screen and playback viewing outside of the seven-day consolidation window.
- Average time spent viewing (ATV) is calculated as the daily average time (0200-2600) within the universe across all days in the calendar quarter multiplied by the factor of numbers of days in the quarter divided by three (3).
- Monthly reach for TV is based on the average of the calendar month cumulative reach audience (0200-2600) within the quarter.
- Video content is defined as a stream where both audio and video are detected. Video viewership excludes adult and advertising content, as well as downloaded content.
- Wherever possible, geographic and demographic data have been matched

- for like comparisons.
- Nielsen Australian Connected Consumer report (ACC) based on online national population aged 16+.
 - Mobile phone ownership and usage sourced from Nielsen Consumer & Media View (people 14+)
 - PVR Penetration within TV households in Table 1 is based on install levels from the Combined OzTAM Metro and Regional TAM panels as at the last date of each period.
 - TAM data defines 'Kids' as panel members aged 0-12, 'Teens' aged 13-17 and 'Male' / 'Female' as total individuals aged 0+
 - Nielsen Netview defines 'Kids' as panel members aged 2-11, 'Teens' aged 12-17 and 'Male' / 'Female' as individuals aged 2+
 - Nielsen Australian Connected Consumer report defines 'Teens' as respondents aged 16-17 and 'Male' / 'Female' respondents aged 16+
 - Nielsen has implemented page crediting improvements in the measurement of web pages and time spent across all online activities, driving a trend break for May 2013 data onwards for time spent online. As part of these improvements, the previous metric of 'PC time spent' has been retired and the new metric of 'online time spent' will be used going forward. Online time spent is inclusive of all online activities including PC applications (e.g. iTunes, Skype etc).

FOR MORE INFORMATION

Should you require more information about any content in this report, please refer to the list below.



DOUG PEIFFER

Chief Executive Officer, OzTAM

doug.peiffer@oztam.com.au

or **MARGARET FEARN**

Principal, Fearnace Media

margaret@fearnacemedia.com



DEBORAH WRIGHT

Chairperson, Regional TAM

dwright@nbn tv.com.au



ERICA BOYD

Senior Vice President
Cross Platform Audience Measurement
SEANAP, Nielsen

erica.boyd@nielsen.com