

AUSTRALIAN MULTI-SCREEN REPORT

QUARTER 3
2013



TV AND OTHER VIDEO CONTENT ACROSS MULTIPLE SCREENS

The latest edition of the Australian Multi-Screen Report (Q3 2013) shows Australians' viewing patterns continue to broaden with the uptake of new and different screen types.

Smaller, mobile devices create additional opportunities to consume television and other video content, complementing the time people spend watching TV in their homes.

Tablets are now present in 37 percent of households (up from 33% in Q2 2013, and 22% a year ago); 67 percent of Australians aged 16+ own a smart phone (56% a year ago); and Internet capable TVs are now in an estimated 22 percent of homes (18% in Q3 2012).

Australians watch an average 95 hours and 51 minutes (95:51) of broadcast television each month on their in-home TVs. In comparison, they spend 5:18 per month viewing video on a PC/laptop ('video' can include both broadcast TV and non-broadcast content such as YouTube), while mobile phones account for 1:20 and tablets 0:50 of such viewing.

PVRs are now in 53 percent of homes (50% in Q3 2012) and penetration has been relatively steady in recent quarters (refer Table 1). Reflecting the imminent analogue switch off, 99 percent of homes had digital terrestrial television (DTT) capability by the third quarter of 2013, with 89 percent having all working household TV sets DTT-capable.

Q3 2011 **Q3 2012** **Q3 2013**



COMPLETELY DTT: PENETRATION WITHIN TV HOUSEHOLDS **65%** **79%** **89%**



PVR: PENETRATION WITHIN TV HOUSEHOLDS **42%** **50%** **53%**



INTERNET CONNECTION: HOUSEHOLD PENETRATION **76%** **78%** **80%**



TABLETS: HOUSEHOLD PENETRATION **N.A.** **22%** **37%**

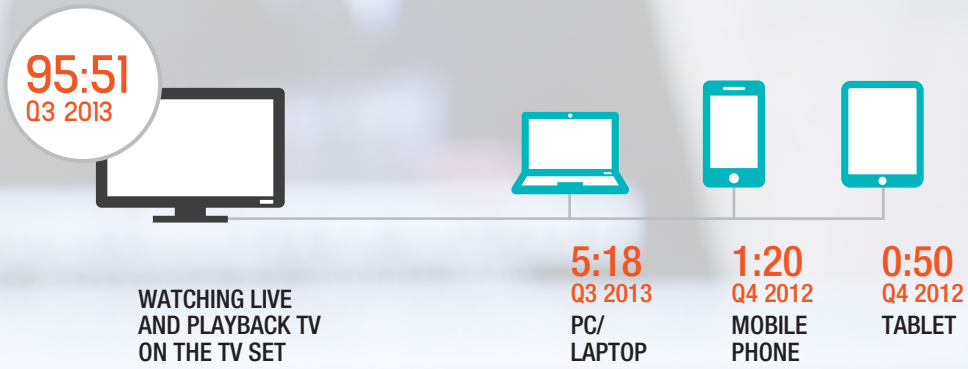


INTERNET CAPABLE TV IN HOME **N.A.** **18%** **22%**



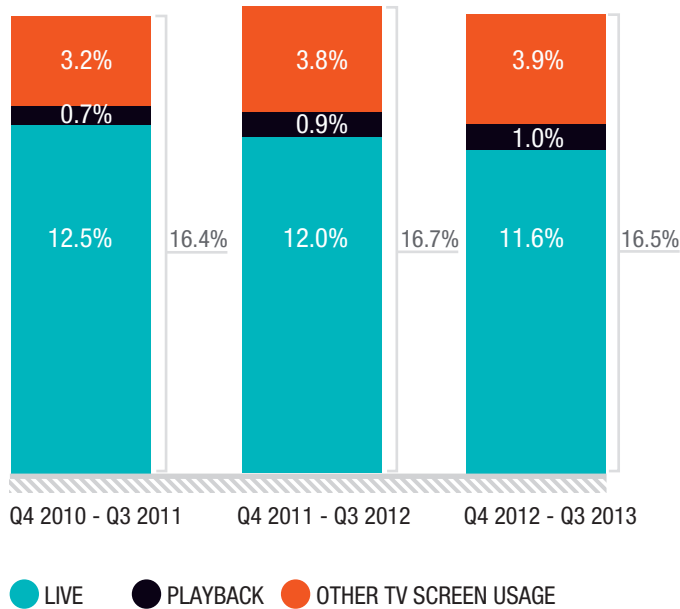
SMARTPHONES: 16+ MOBILE PHONE SUBSCRIBERS **46%** **56%** **67%**

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

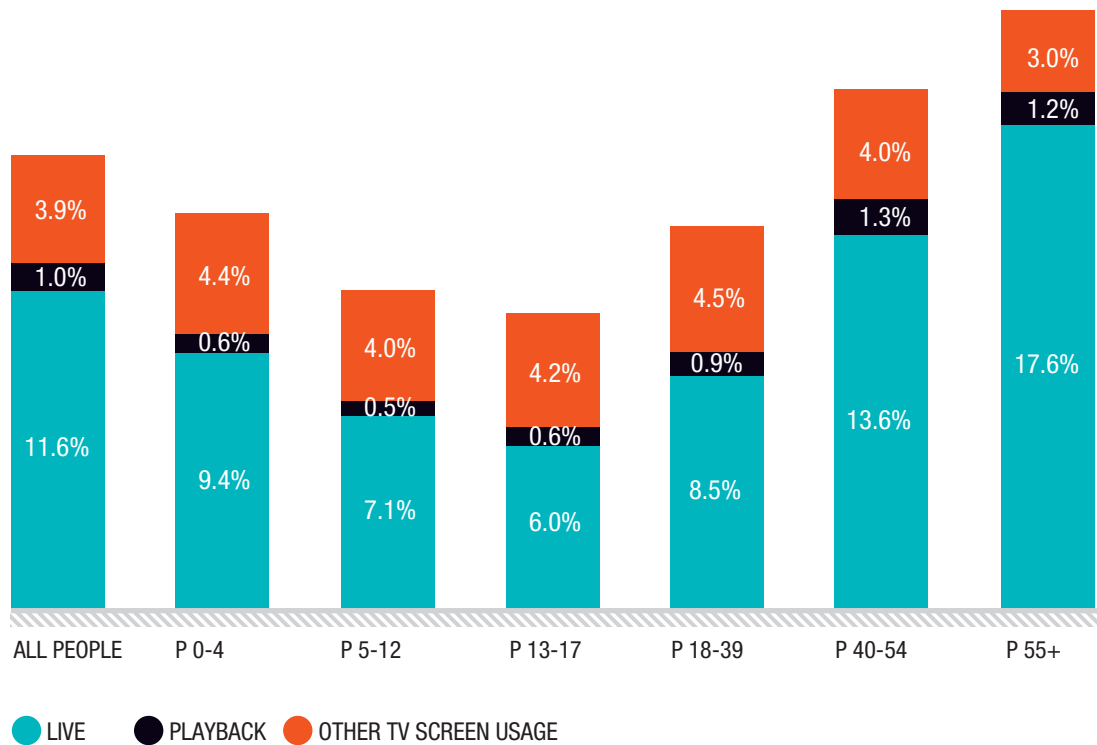



TOTAL TV SCREEN USAGE

TARP - ALL PEOPLE



TARP BY DEMOGRAPHICS - Q4 2012 TO Q3 2013





As observed in earlier editions, the Q3 2013 Multi-Screen Report shows Total Use of the television set is relatively steady year-on-year, although the way people use their sets is evolving with the progressive adoption of new technologies attached to the TV set (e.g., PVRs, games consoles, 'over-the-top services') and also as Internet capable televisions become more commonplace.

The continued increase in Playback TV viewing (within seven days of original broadcast) and Other TV Screen Usage balance the slight decline in Live Viewing.

Overall the amount of TV screen use and the way it is used varies by age. Compared to other age groups, people 13-17 devote the greatest proportion of their time with the TV set to Other Usage, however, they still spend about two thirds of their screen time watching broadcast television (Live and Playback).

SPECIAL STUDY: PLAYBACK VIEWING BEYOND SEVEN DAYS

This edition of the Multi-Screen Report presents a first insight into the level of playback TV viewing that happens beyond eight and up to 28 days from original broadcast in Australian homes.

A special study was commissioned to look at the level of additional playback viewing of broadcast content during a four-week period (weeks 9 to 12) in the 2011, 2012 and 2013 ratings calendar years.

While Time Shift viewing (Playback within seven days) accounts for just over seven of the approximately

96 hours of conventional TV Australians watch each month, viewing of recorded broadcast TV content between eight and 28 days later is minimal.

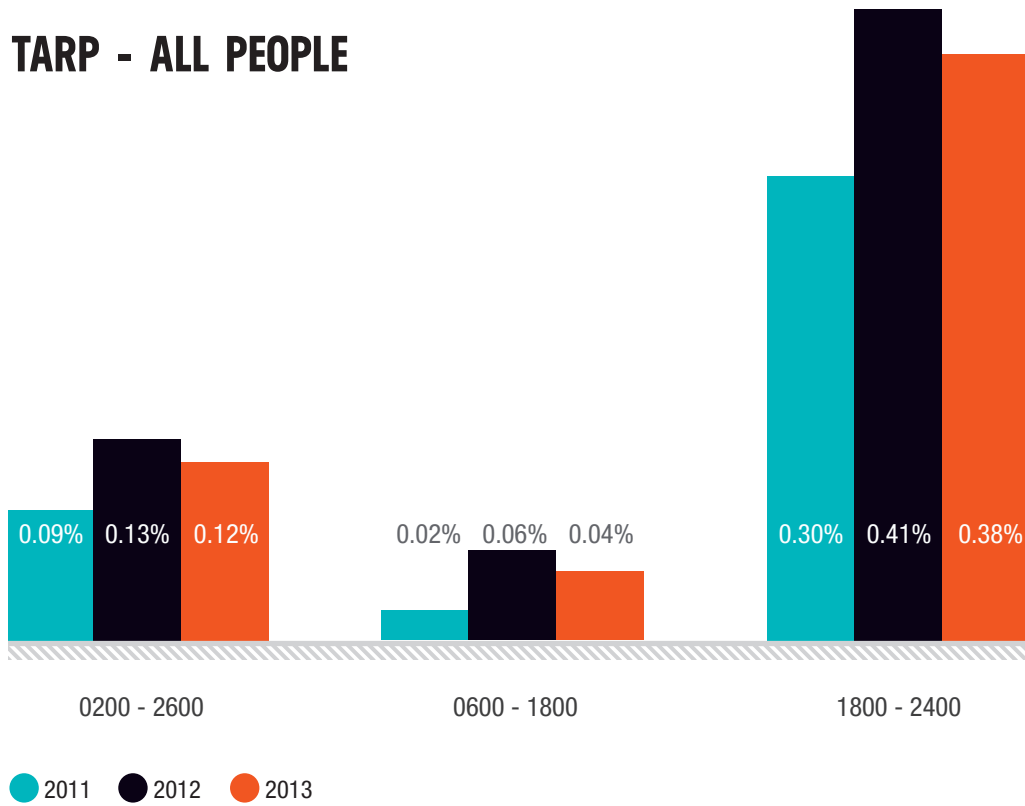
For example, in the 4-week period in 2013, broadcast TV viewing had a TARP gain of 0.12 percent from playback between eight and 28 days. (A TARP, or target audience rating point, is the typical audience in a given period expressed as a percentage of the target demographic.)

That equates to a 0.93 percent share (less than 1) of all viewing in the 28-day period.

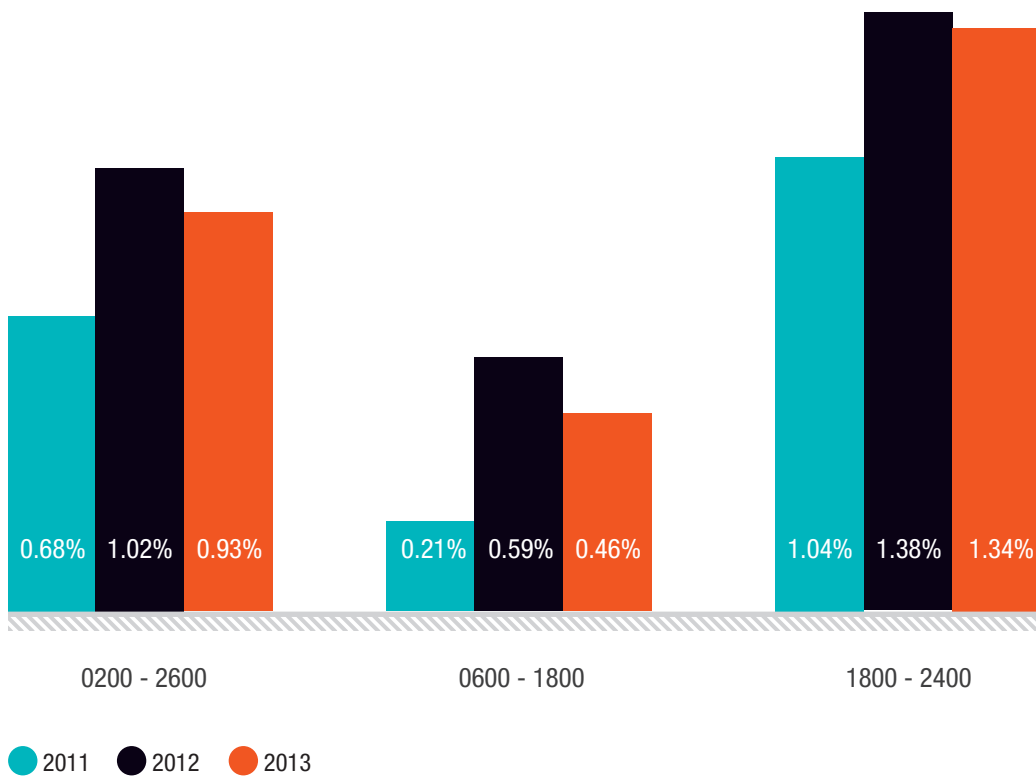


DAY 8-28 PLAYBACK VIEWING

TARP - ALL PEOPLE



SHARE % OF VIEWING ESTIMATES - ALL PEOPLE



TOTAL TV SCREEN USAGE – SHAPE OF THE DAY [SUNDAY – SATURDAY]

In Q2 2013, the Multi-Screen Report presented the 'shape of the day' for Total Television Use, highlighting the levels of screen activity Australians undertake throughout the day for Live viewing, Playback viewing (within seven days of broadcast) or Other TV screen use.

This latest report provides a closer look at Total TV Screen Usage across the day by different age groups. The following charts show how each age

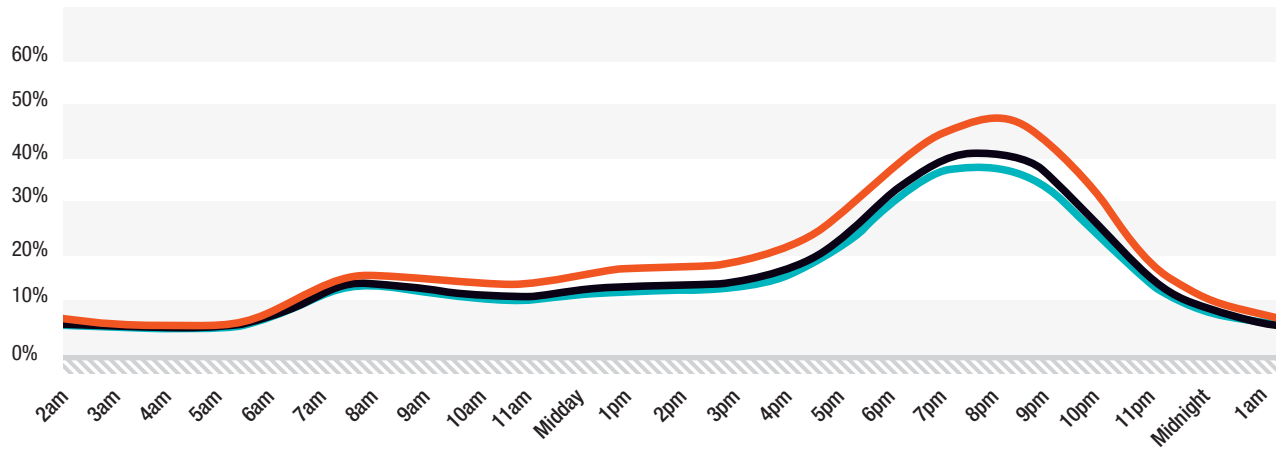
group uses the TV screen differently overall as well at different times during the day.

For example, overall TV use in the morning is greatest amongst young children (0-12), while Other TV Screen usage during the day by teenagers is large compared to All People and is also a major part of teens' overall TV use during the day.

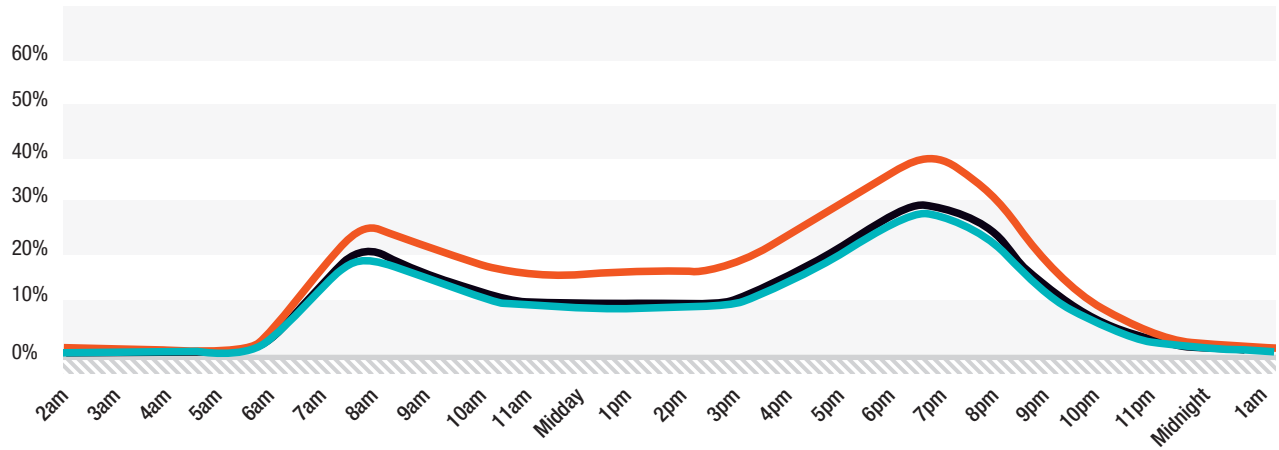


TARP - ALL WEEK (SUNDAY-SATURDAY) PLAYBACK UP TO 7 DAYS

ALL PEOPLE

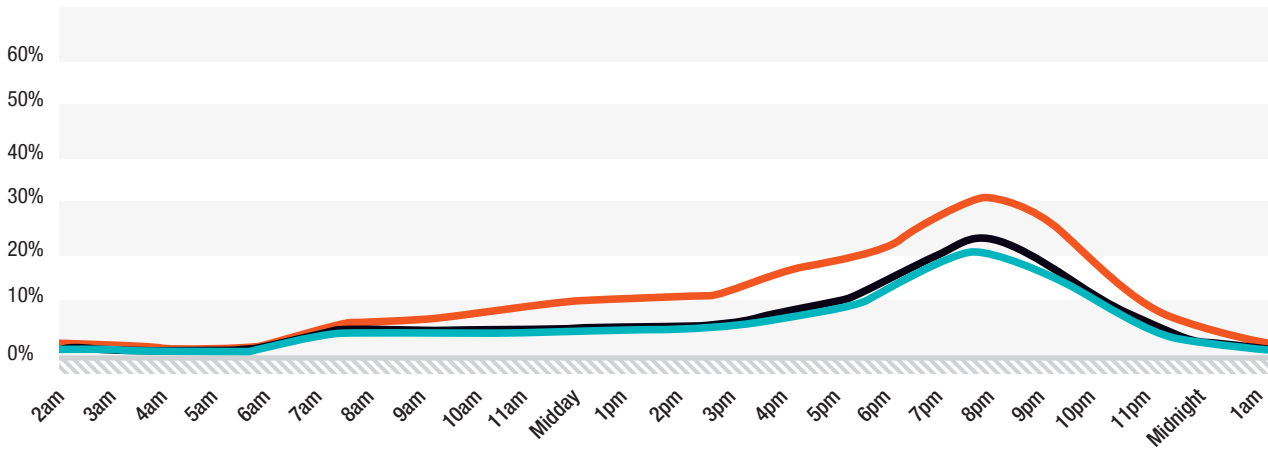


P0-12

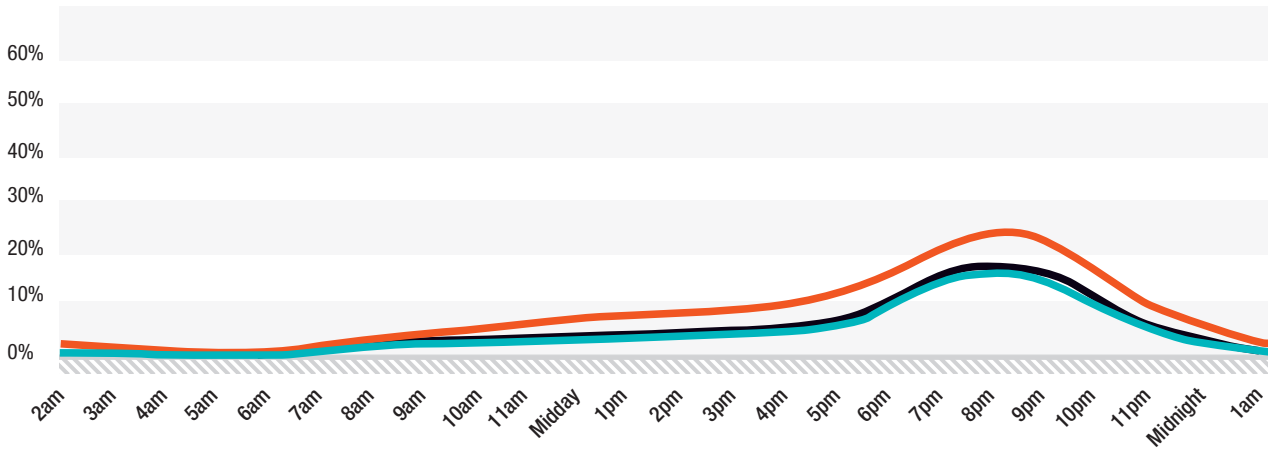


● LIVE
 ● LIVE + PLAYBACK
 ● TOTAL TV USAGE (LIVE + PLAYBACK + OTHER TV SCREEN USAGE)

P13-17

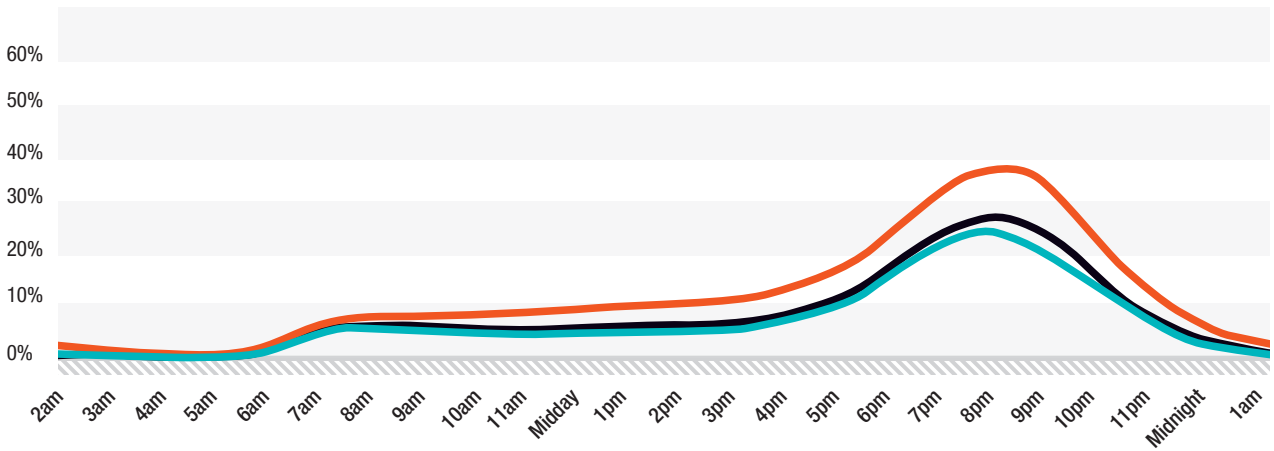


P18-24

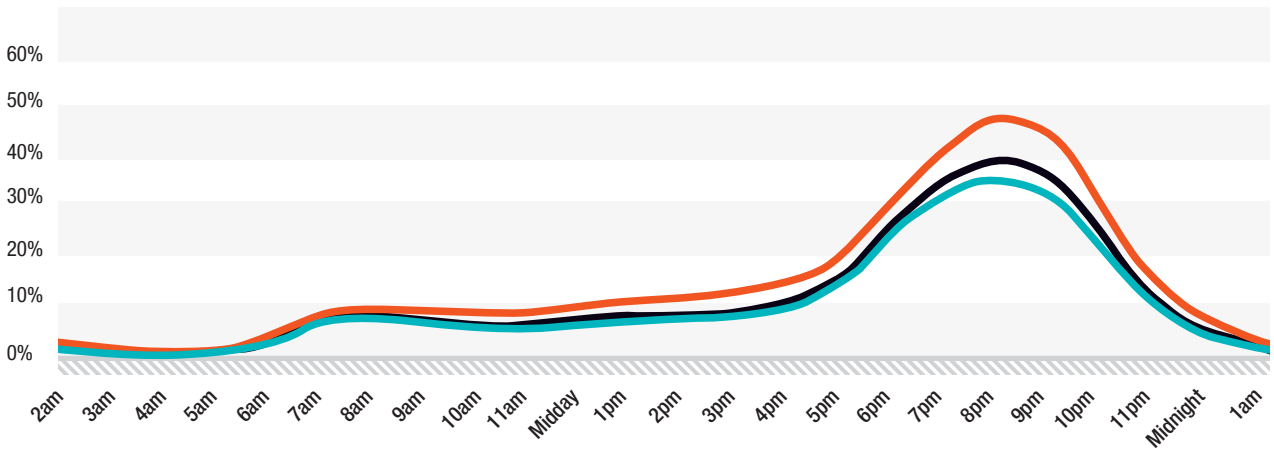


● LIVE
 ● LIVE + PLAYBACK
 ● TOTAL TV USAGE (LIVE + PLAYBACK + OTHER TV SCREEN USAGE)

//// P25-34

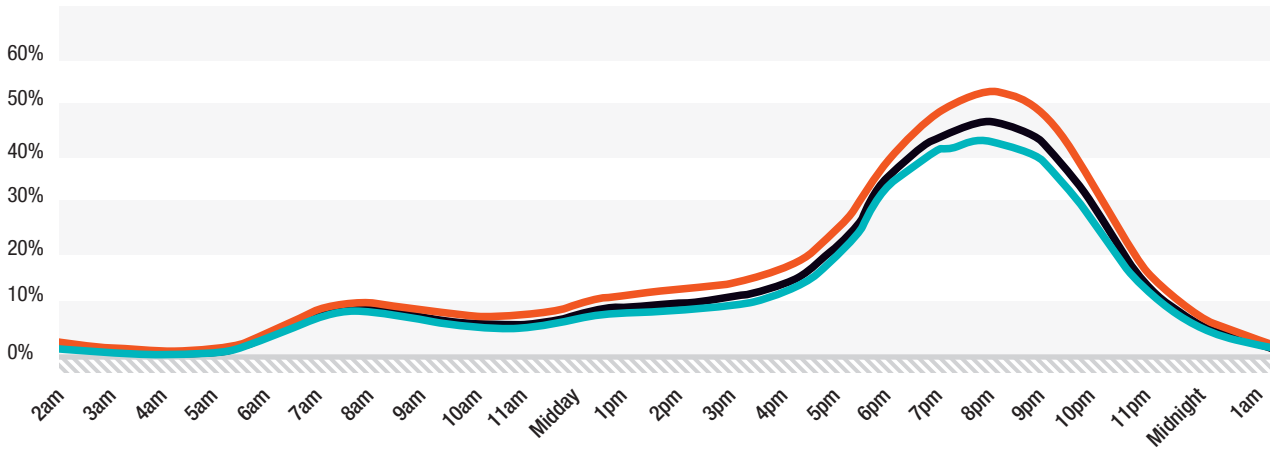


//// P35-49

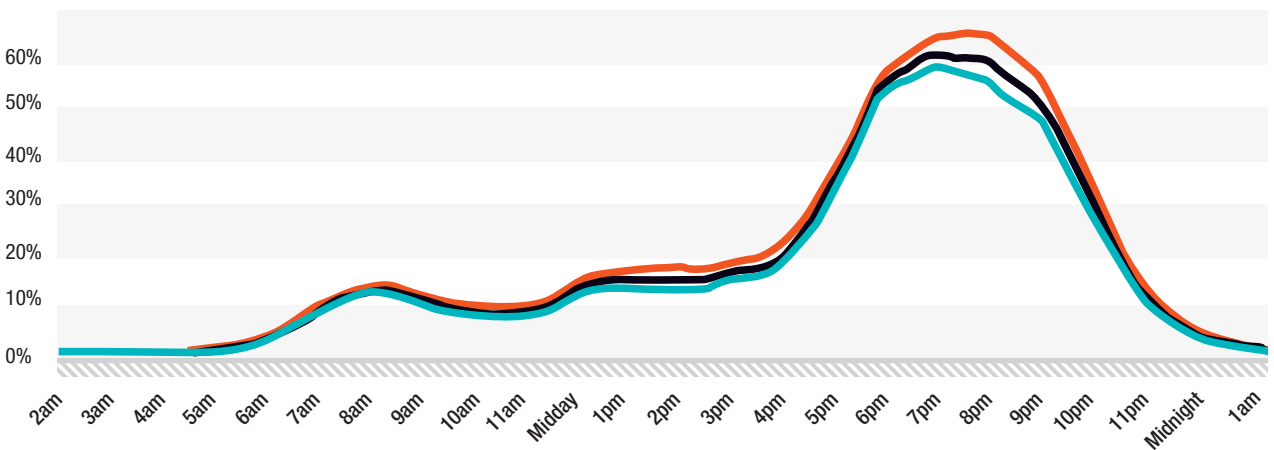


● LIVE
 ● LIVE + PLAYBACK
 ● TOTAL TV USAGE (LIVE + PLAYBACK + OTHER TV SCREEN USAGE)

/// P50-64



/// P65+



● LIVE
 ● LIVE + PLAYBACK
 ● TOTAL TV USAGE (LIVE + PLAYBACK + OTHER TV SCREEN USAGE)

KEY OBSERVATIONS

TABLE 1: TECHNOLOGY PENETRATION

	Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013
Completely DTT: Penetration within TV households (Homes capable of receiving DTT on each working TV within the home)	79%	81%	84%	88%	89%
Personal video recorder (PVR): Penetration within TV households	50%	52%	53%	54%	53%
Internet Connection: Household penetration ¹	78%	79%	80%	80%	80%
Tablets: Household penetration	22%	27%	31%	33%	37%
Internet Capable TV in Home	18%	20%	21%	22%	22%
Smartphones: People 16+ ²	56%	59%	61%	65%	67%

TABLE 2: MONTHLY TIME SPENT (HH:MM)

	Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013
Watching TV in the home ³	99:54	91:05	92:39	96:37	95:51
Watching Playback TV	6:46	6:30	6:48	7:46	7:10
Using Internet on a PC ⁴	48:00	50:42	51:47	-	-
Online time spent per person ⁵	-	-	-	38:41	38:45
Watch video on PC/Laptop	3:54	-	-	-	-
Watch video on Internet ⁶	-	5:54	6:43	6:26	5:18
Watching online video on a mobile phone ⁷	N.A.	1:20	N.A.	N.A.	N.A.
Watching online video on a tablet	N.A.	0:50	N.A.	N.A.	N.A.

¹Source: 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 capable TV in Home refers to the capability to be internet connected, whether connected or not.

²Sources: Nielsen Consumer & Media View national population aged 16+ (Q4 onwards).

³Source: 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.

⁴Source: Nielsen Online Ratings. 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.

⁵Source: Nielsen Online Ratings – Hybrid Surfing 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+. Figures include all online activities inclusive of PC applications such as iTunes, Skype etc.

⁶Source: Nielsen Online Ratings – Hybrid Streaming (formerly VideoCensus) from Q32013 onwards. 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. Figures for Q4 2012 are the average of November and December 2012.

⁷Mobile 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.

⁸Source: 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.

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

	Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013
Watching TV in the home ⁸	21,682	21,653	21,651	21,751	21,735
Watching Playback TV	9,706	9,646	9,595	10,092	9,712
Using Internet on a PC ⁹	12,874	14,703	14,908	-	
Online time spent per person ¹⁰	-	-	-	16,979	16,744
Watch video on PC/Laptop ¹¹	9,947				
Watch video on Internet ¹²	-	11,103	11,412	12,055	12,313
Owning/using a mobile phone ¹³	17,445	17,365	17,477	17,530	17,504
Watching online video on mobile phone ¹⁴	N.A.	2,369	N.A.	N.A.	N.A.
Watching online video on tablet ¹⁵	N.A.	1,185	N.A.	N.A.	N.A.

TABLE 4: A MONTH IN THE LIFE – Q3 2013

	KIDS ¹⁶	TEENS ¹⁷	P18-24	P25-34	P35-49	P50-64	P65+	ALL PEOPLE ¹⁸
Watching TV in the home ¹⁹	67:20	49:17	46:37	77:28	104:26	127:56	149:15	95:51
Q3 2012	70:10	58:21	49:55	84:25	107:23	132:37	152:47	99:54
Watching Playback TV	4:11	4:26	4:36	6:41	8:46	9:34	8:41	7:10
Q3 2012	4:06	4:15	4:22	6:41	8:25	8:44	7:51	6:46
Online time spent per person ²⁰	7:38	14:41	42:04	43:57	41:33	41:17	26:36	38:45
Watch video on Internet ²¹	3:55	6:33	10:50	7:26	4:53	3:09	1:58	5:18
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 tablet (Q4 2012)	N.A.	1:26	0:46	1:32	0:59	0:34	0:20	0:50

⁸Source: Nielsen Online Ratings. Using Internet connected 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 change in methodology, comparisons prior to Q4 2011 cannot be made.

⁹Source: Nielsen Online Ratings – Hybrid Surfing 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+. Figure includes all online activities inclusive of PC applications such as iTunes, Skype etc.

¹¹Source: 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+.

¹²Source: Nielsen Online Ratings – Hybrid Streaming. 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. Figures for Q4 2012 are the average of November and December 2012.

¹³Mobile phone ownership and usage sourced from Nielsen Consumer & Media View (people aged 14+).

¹⁴Source: 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).

¹⁵Mobile 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.

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

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

¹⁸Mobile phone population based on people aged 16+.

¹⁹Source: 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.

²⁰Source: Nielsen Online Ratings – Hybrid Surfing 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+. Figure includes all online activities inclusive of PC applications such as iTunes, Skype etc.

²¹Source: Nielsen VideoCensus. Figures for Q4 2012 are an average for November – December 2012. Nielsen Online Ratings – Hybrid Streaming (formerly VideoCensus) from Q3 2013 onwards. 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.

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

KIDS	Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013
Watching TV in the home ¹⁹	70:10	62:55	61:37	66:46	67:20
Watching Playback TV	4:06	3:55	3:56	4:20	4:11
Using the Internet on a PC ¹⁰	8:12	8:35	9:27		
Online time spent per person ²⁰				6:34	7:38
Watching video on PC/Laptop	2:19				
Watching video on Internet ²¹		4:52	4:49	4:37	3:55
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	Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013
Watching TV in the home ¹⁹	58:21	51:14	47:25	49:45	49:17
Watching Playback TV	4:15	4:22	4:11	4:57	4:26
Using the Internet on a PC ¹⁰	16:42	19:08	15:15	-	-
Online time spent per person ²⁰	-	-	-	14:47	14:41
Watching video on PC/Laptop	3:12	-	-	-	-
Watching video on Internet ²¹	-	6:40	6:56	7:18	6:33
Watching online video on a mobile phone (Q4 2012) ²²	1:29	4:24	N.A.	N.A.	N.A.
Watching online video on a tablet (Q4 2012)	N.A.	1:26	N.A.	N.A.	N.A.

P18-24	Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013
Watching TV in the home ¹⁹	49:55	44:08	44:30	47:18	46:37
Watching Playback TV	4:22	3:59	4:09	4:52	4:36
Using the Internet on a PC ¹⁰	38:34	41:17	45:41	-	-
Online time spent per person ²⁰	-	-	-	23:07	42:04
Watching video on PC/Laptop	6:05	-	-	-	-
Watching video on Internet ²¹	-	11:36	13:16	13:01	10:50
Watching online video on a mobile phone (Q4 2012) ²²	2:54	2:23	N.A.	N.A.	N.A.
Watching online video on a tablet (Q4 2012)	N.A.	0:46	N.A.	N.A.	N.A.

P25-34	Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013
Watching TV in the home ¹⁹	84:25	73:31	76:50	81:24	77:28
Watching Playback TV	6:41	5:59	6:06	7:31	6:41
Using the Internet on a PC ¹⁰	61:18	61:55	62:02	-	-
Online time spent per person ²⁰	-	-	-	43:53	43:57
Watching video on PC/Laptop	5:10	-	-	-	-
Watching video on Internet ²¹	-	8:19	8:20	8:39	7:26
Watching online video on a mobile phone (Q4 2012) ²²	2:55	2:54	N.A.	N.A.	N.A.
Watching online video on a tablet (Q4 2012)	N.A.	1:32	N.A.	N.A.	N.A.

P35-49	Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013
Watching TV in the home ¹⁹	107:23	97:19	97:09	103:07	104:26
Watching Playback TV	8:25	8:21	8:41	9:50	8:46
Using the Internet on a PC ¹⁰	56:22	59:23	59:47	-	-
Online time spent per person ²⁰	-	-	-	43:42	41:33
Watching video on PC/Laptop	3:50	-	-	-	-
Watching video on Internet ²¹	-	5:01	6:14	6:02	4:53
Watching online video on a mobile phone (Q4 2012) ²²	0:57	1:24	N.A.	N.A.	N.A.
Watching online video on a tablet (Q4 2012)	N.A.	0:59	N.A.	N.A.	N.A.

P50-64	Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013
Watching TV in the home ¹⁹	132:37	121:22	125:13	128:52	127:56
Watching Playback TV	8:44	8:22	9:10	10:20	9:34
Using the Internet on a PC ¹⁰	54:43	59:01	60:14	-	-
Online time spent per person ²⁰	-	-	-	40:53	41:17
Watching video on PC/Laptop	3:06	-	-	-	-
Watching video on Internet ²¹	-	3:21	4:06	3:39	3:09
Watching online video on a mobile phone (Q4 2012) ²²	0:18	0:15	N.A.	N.A.	N.A.
Watching online video on a tablet (Q4 2012)	N.A.	0:34	N.A.	N.A.	N.A.

P65+	Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013
Watching TV in the home ¹⁹	152:47	146:36	150:25	151:20	149:15
Watching Playback TV	7:51	7:42	8:04	8:54	8:41
Using the Internet on a PC ¹⁰	33:42	35:50	36:44	-	-
Online time spent per person ²⁰	-	-	-	25:17	26:36
Watching video on PC/Laptop	1:44	-	-	-	-
Watching video on Internet ²¹	-	1:48	1:52	2:06	1:58
Watching online video on a mobile phone (Q4 2012) ²²	0:00	0:01	N.A.	N.A.	N.A.
Watching online video on a tablet (Q4 2012)	N.A.	0:20	N.A.	N.A.	N.A.

ALL PEOPLE	Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013
Watching TV in the home ¹⁹	99:54	91:05	92:39	96:37	95:51
Watching Playback TV	6:46	6:30	6:48	7:46	7:10
Using the Internet on a PC ¹⁰	48:00	50:42	51:47	-	-
Online time spent per person ²⁰	-	-	-	38:41	38:45
Watching video on PC/Laptop	3:55	-	-	-	-
Watching video on Internet ²¹	-	5:54	6:43	6:26	5:18
Watching online video on a mobile phone (Q4 2012) ²²	1:20	1:20	N.A.	N.A.	N.A.
Watching online video on a tablet (Q4 2012)	N.A.	0:50	N.A.	N.A.	N.A.

TABLE 5: VIDEO AUDIENCE COMPOSITION (BY AGE AND GENDER) – Q3 2013

	KIDS	TEENS	P18-24	P25-34	P35-49	P50-64	P65+	FEMALES	MALES
On Traditional TV ²³	11%	3%	5%	12%	23%	24%	22%	53%	47%
Q3 2012	11%	4%	5%	12%	22%	24%	21%	53%	47%
On Internet ²⁴	2%	4%	11%	19%	29%	22%	13%	49%	51%
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%

²²Mobile 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.

²³Source: 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).

²⁴Source: Nielsen VideoCensus. Figures for Q4 2012 are an average of November - December 2012. Nielsen Online Ratings - Hybrid Streaming (formerly VideoCensus), from Q3 2013 onwards. 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.

²⁵Nielsen 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 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 16+)
 - PVR All Households penetration in 'Profiling Tablet and Smartphone Households' table is based on Combined OzTAM Metro and Regional TAM quarterly Establishment Survey (Q3, 2012). 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)





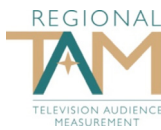
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