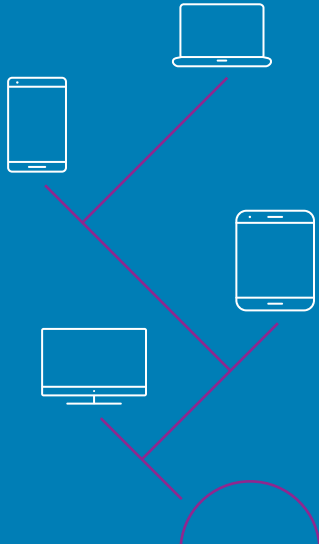


AUSTRALIAN MULTI-SCREEN REPORT

QUARTER 01 2016



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measuring audiences

REGIONAL
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TELEVISION AUDIENCE
MEASUREMENT

nielsen
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Australian viewing trends across multiple screens

In Q1 2016 the Australian Multi-Screen report continues its look at how audience behaviour is influenced by greater content and platform choice, and access to new consumer technologies. Together these changes create unprecedented opportunities to view broadcast TV and other video.

This edition also explores 'longer-tail' consumption of free-to-air and subscription television content – both through TV sets and on connected devices – and its contribution to overall viewing of broadcast television.

As is customary in Q1, this issue presents information from Nielsen's Australian Connected Consumers Report on multi-screening (the tendency to use one or more screens simultaneously while watching television) and top activities undertaken on connected devices by age group.



Ongoing trends include:

Australian homes have more screens, the majority of which are internet-capable.

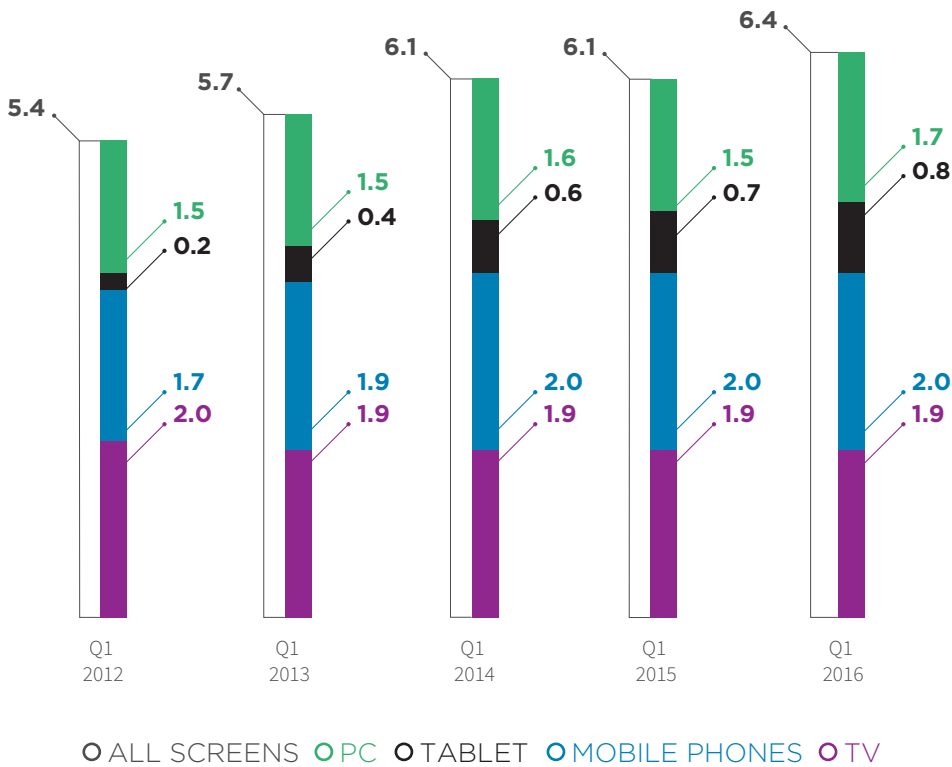
As of Q1 2016 Australian homes had an average of 6.4 screens each – up from 6.1 a year ago and 5.4 in Q1 2012.

While the TV set remains a central fixture in most households the average number of TVs has fallen slightly over the past four years, from 2 per household in Q1 2012 to 1.9 now.

Over the same period, the incidence of portable devices – particularly tablets – has grown significantly, such that on average multiple screens in Australian homes are now internet-capable.



AVERAGE NUMBER OF DEVICES PER HOME



As people often upgrade a tablet or a mobile phone and retain the older model for secondary use, the number of screens present in homes continues to grow even as penetration levels for various device types plateau.

Because any connected device can be used like a PVR to watch catch up TV, more devices create more opportunities to view –

especially as portability allows people to take TV with them wherever they go.

OzTAM's Video Player Measurement (VPM) service, which measures viewing of participating broadcasters' internet-delivered TV content, shows approximately 2.31 million connected devices access catch up TV each week.

Source: Estimates for the average number of TVs and mobile phones in homes are based on OzTAM Metro and Regional TAM Establishment Surveys. Tablet and PC estimates are based on OzTAM Metro and Regional TAM long Establishment Surveys using hybrid estimates of incidence per home covered by full Household Information/Household Update surveys.

More content choice and ways to get it mean Australians are spreading their screen activity.

TV remains by far the most-watched screen and across the overall population takes the greatest share of viewing. More than 86 per cent of Australians watch some broadcast TV (free-to-air and/or subscription channels) on in-home TV sets each week, and reach remains strong in all major age groups.

Across all screens, devices and types of video, 84.3 per cent of viewing goes to TV

content watched on in-home sets within seven days of original broadcast: on average 85 hours and 12 minutes per Australian each month.

Content and platform options continue to grow, and the TV set itself can be used for many purposes in addition to watching television. The number of hours in the day remains constant though, and the net effect of greater choice and opportunity to view is

Australians spend a little less time each day watching live TV or playing it back on their sets within seven days than they did a year ago, with weekly reach falling a couple per cent for most age groups as well.

BROADCAST TV VIEWING ON IN-HOME TV SETS

	Q1 2015 % REACH	Q1 2016 % REACH	Q1 2016 WEEKLY AVERAGE CUMULATIVE REACH
TOTAL PEOPLE	88.1	86.1	20.21m
KIDS	89.1	86.2	3.30m
TEENS	79.2	74.4	1.07m
P16-24	71.5	69.1	1.53m
P25-39	83.4	79.2	2.77m
P40-54	90.9	89.8	4.23m
P55-64	94.1	93.0	3.94m
P65+	94.9	95.3	3.38m

Average 1-minute weekly cumulative reach, OzTAM and Regional TAM. Live viewing and playback through the TV set within seven days.

Longer-tail viewing is becoming significant

Australians increasingly view TV content beyond the 7-day Consolidated ratings window.

1.6 per cent of all broadcast TV watched on in-home TV sets in any four-week period is time-shifted between eight and 28 days of the original broadcast. In prime time the proportion of 8-28 day playback rises to 2.1 per cent. VPM catch up (on

demand) viewing accounts for around 1 per cent of all broadcast content viewed each month.

Together 8-28 day time-shifted viewing on in-home TV sets, and VPM viewing on connected devices, now account for 2.5 to 3 per cent of monthly broadcast content watched.

This 'longer tail' viewing – explored further on pages 14-16 – is on top of broadcast TV watched live or played back within seven days. 8-28 day viewing does not feature in the time spent viewing figures in Tables 1-4 in the Multi-Screen Report or in the Time Spent Viewing graphic on page 10 in this issue.

Online Australians maintain a high level of multi-screening

Online Australians remain frequent multi-screener. Simultaneous screen use is stabilising among younger consumers but continues to rise among certain older segments.

76 per cent of online Australians multi-screen, with 33 per cent now accessing content on two or more devices while watching TV (i.e., triple-screening).

Nine in 10 online consumers aged 16-34 multi-screen, little changed on the previous year, and people 65+'s multi-screening is also largely stable. The 35-49 and 50-64 year-old segments both increased their multi-screen behaviour, with the bulk of growth in triple-screening.



Technology in Australian homes

As seen in the previous section penetration rates for new technologies continue to slow even as the number of devices in homes grows. This is due to the comparatively rapid adoption of technologies in the early stage of release along with people's tendency to retain an older model device when upgrading to a newer version.

81 per cent of Australians aged 14 and over own a **smartphone**, 5 percentage points higher than in Q1 2015.

49 per cent of Australian households have at least one **tablet**, unchanged on the previous two quarters and up from 47 per cent a year ago.

Internet capable televisions ('smart' or 'hybrid' TVs) – whether connected to the internet or not – are in 35 per cent of homes (30 per cent a year earlier).

Every Australian TV home can receive **digital terrestrial television** (DTT) channels. 97 per cent can do so on *each* working TV set in the home, while *every* set in 95 per cent of homes is **high definition** capable.

58 per cent of homes have a **Personal Video Recorder** (PVR) and 17 per cent have two or more (56 per cent, 15 per cent a year earlier).

81 per cent of homes have an **internet connection**; this has hovered at 80 per cent for the past three years.





TECHNOLOGY PENETRATION

Q1 2013 Q1 2014 Q1 2015 Q1 2016

84% 93% 96% 97%



TV HOUSEHOLDS THAT RECEIVE DTT ON **EVERY** WORKING TV SET

n.a n.a 93% 95%



TV HOUSEHOLDS THAT RECEIVE **HD** DTT ON **EVERY** WORKING TV SET

53% 54% 56% 58%



PERSONAL VIDEO RECORDER (PVR): PENETRATION WITHIN TV HOUSEHOLDS

13% 14% 15% 17%



2+ PVR: PENETRATION WITHIN TV HOUSEHOLDS

80% 80% 80% 81%



INTERNET CONNECTION: HOUSEHOLD PENETRATION

31% 42% 47% 49%



TABLETS: HOUSEHOLD PENETRATION

21% 27% 30% 35%



INTERNET CAPABLE TV IN HOME

61% 69% 76% 81%



SMARTPHONE: MOBILE PHONE SUBSCRIBERS*

*Source for Smartphone: Mobile Phone Subscribers: Nielsen Consumer & Media View, national population 16+ Q1 2013 and Q1 2014 and Nielsen Online Ratings Establishment Survey, national population 14+ Q1 2015 and Q1 2016.



Time spent viewing across devices

Australians have more opportunities to view video than ever before; successive editions of the Multi-Screen Report have accordingly shown how greater content and platform choice influence the time people spend using various devices.

On average Australians spent 85 hours and 12 minutes (85:12) each month in Q1 2016 watching broadcast TV (free-to-air and subscription channels) – either live or played back through their TV sets within seven days of the program first going to air (89:28 a year earlier).

91.2 per cent (or 77:44) of broadcast viewing in the quarter was **live**, with **playback** through the TV set within seven days at 7:28 (7:31 a year earlier).

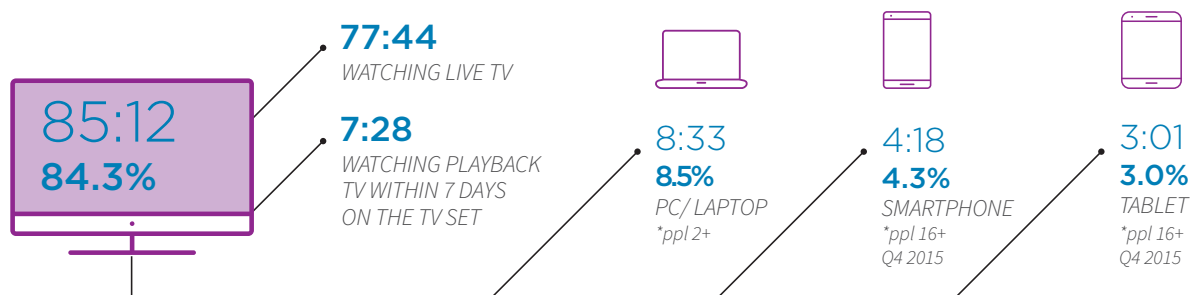
Looking across all screens and all types of video – broadcast and non-broadcast – 84.3 per cent of viewing is broadcast TV watched live or played back within seven days on in-home TV sets.





VIDEO VIEWING, AVERAGE TIME SPENT PER MONTH

TV // PC // SMARTPHONE // TABLET



Time spent watching TV is from OzTAM/Regional TAM in-home panels and *excludes 8-28 day playback* ('Consolidated 28') viewing. **Watching Video on PC/laptop** is from Nielsen Online Ratings using tagged data and metered panel data and includes all online video – broadcast and non-broadcast. **Viewing on smartphones and tablets** is claimed behaviour by online Australians aged 16+ from Nielsen's Australian Connected Consumers Report and includes all online video. Percentages have been rounded.

While people (particularly those aged 24 and under) increasingly use connected devices to watch TV and other video, broadcast TV viewed on TV sets accounts for the largest proportion of viewing time on any single device.

13.03 million Australians aged 2 and older watched any online video on a **PC or laptop** each month in Q1 2016, spending on average 8 hours and 33 minutes

(8:33) per month compared to 6:57 a year earlier doing so. This material includes streamed video (such as internet-delivered catch up TV, live streaming and subscription video services) and video such as YouTube, Vimeo and Facebook.

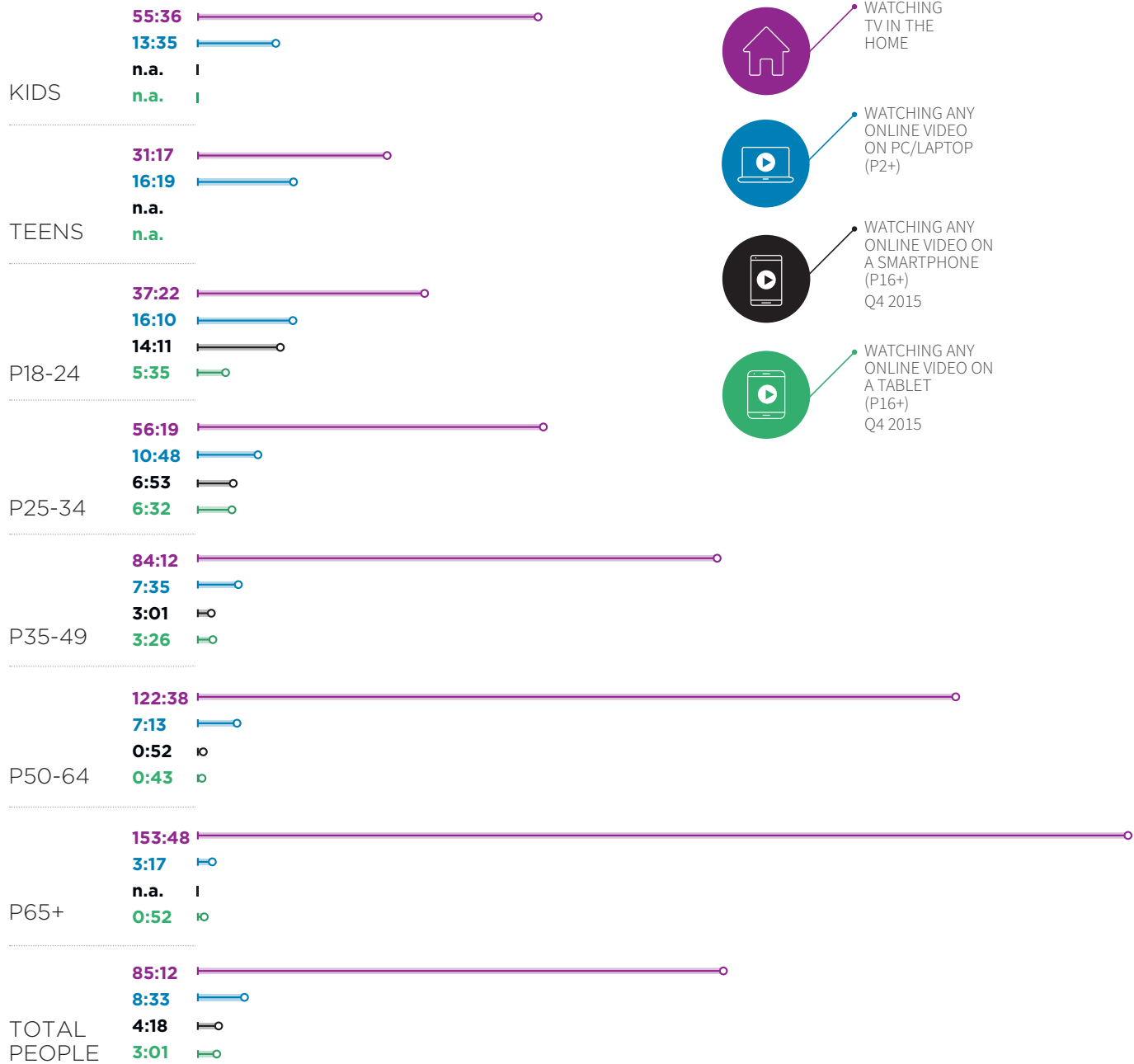
Each month in the quarter Australians aged 2+ spent an average 50:30 online on home and work computers.*

Online Australians aged 16+ claim to spend 4:18 on average each month watching any online video on a **smartphone** (Q4 2015, compared to 2:24 a year earlier). They report spending 3:01 viewing any online video on **tablets** (2:03 in Q4 2014).

* Please note Online Time Spent Per Person estimates are from February 2016 onwards, using Nielsen Digital Ratings Monthly (DRM). DRM was launched to market on 31st March 2016 and leverages the hybrid methodology and fuses together PC, smartphone and tablet panels. The data should not be compared to the previous hybrid surfing service, Nielsen Online Ratings (NOR), as a trend break for all metrics was made upon launch of DRM.

A MONTH IN THE LIFE

TV // PC // LAPTOP // SMARTPHONE // TABLET



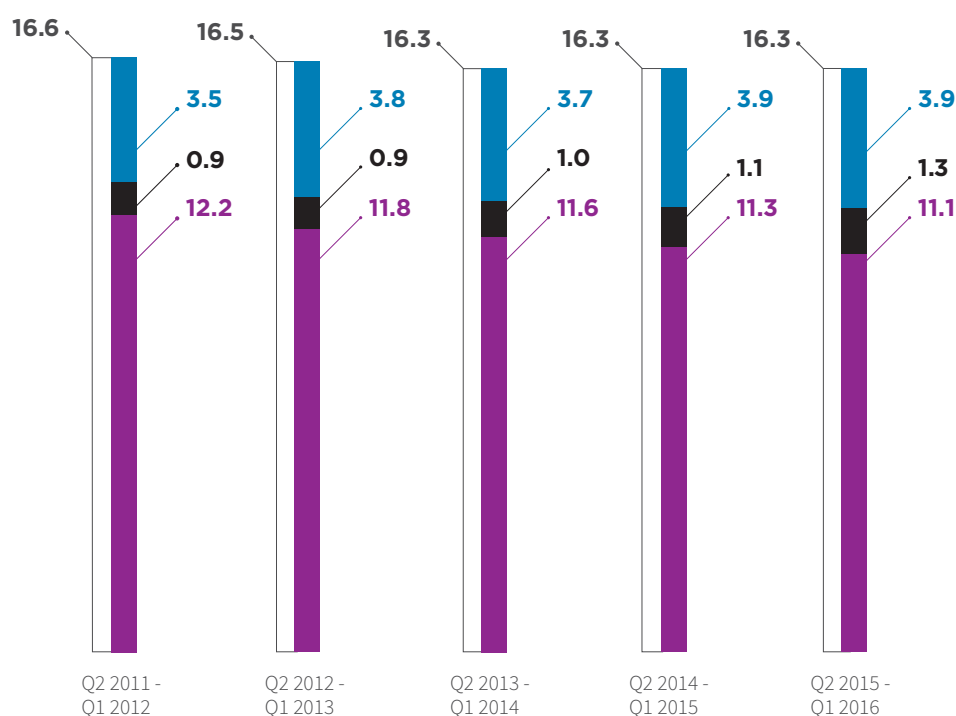


Total use of the television set

TV sets are increasingly multi-functional thanks to take-up of internet capable televisions and devices attached to the TV set. **'Other TV screen use'**, which this functionality enables, includes viewing TV network live streaming and catch up services; watching DVDs; playing back recorded broadcast material outside the 28-day Consolidated viewing window; internet browsing; streaming music; and accessing over-the-top internet-delivered video services.

Accordingly, the way in which Australians use their TV sets is evolving. Over the past five years the proportion of time people devote to other screen use has risen from 3.5 per cent TARP in 2011/12 to 3.9 per cent in the latest rolling four-quarter period to Q1 2016.

TARP % TOTAL PEOPLE



Note: A TARP, or Target Audience Rating Point, is the typical audience at any one period in time expressed as a percentage of the total potential audience. For example, on average at any one minute in the period Q2 2015 - Q1 2016 (far right bar, left) an estimated 16.3 per cent of Australians were using their in-home TV screens.

○ LIVE ○ PLAYBACK ○ OTHER TV SCREEN USE

Source: OzTAM and Regional TAM databases with overlap homes de-duplicated. Playback is broadcast content played back through the TV set at normal speed within either 7 or 28 days of original broadcast. Playback up to and including Q4 2015 is to 7 days, Q1 2016 includes up to 28 days.



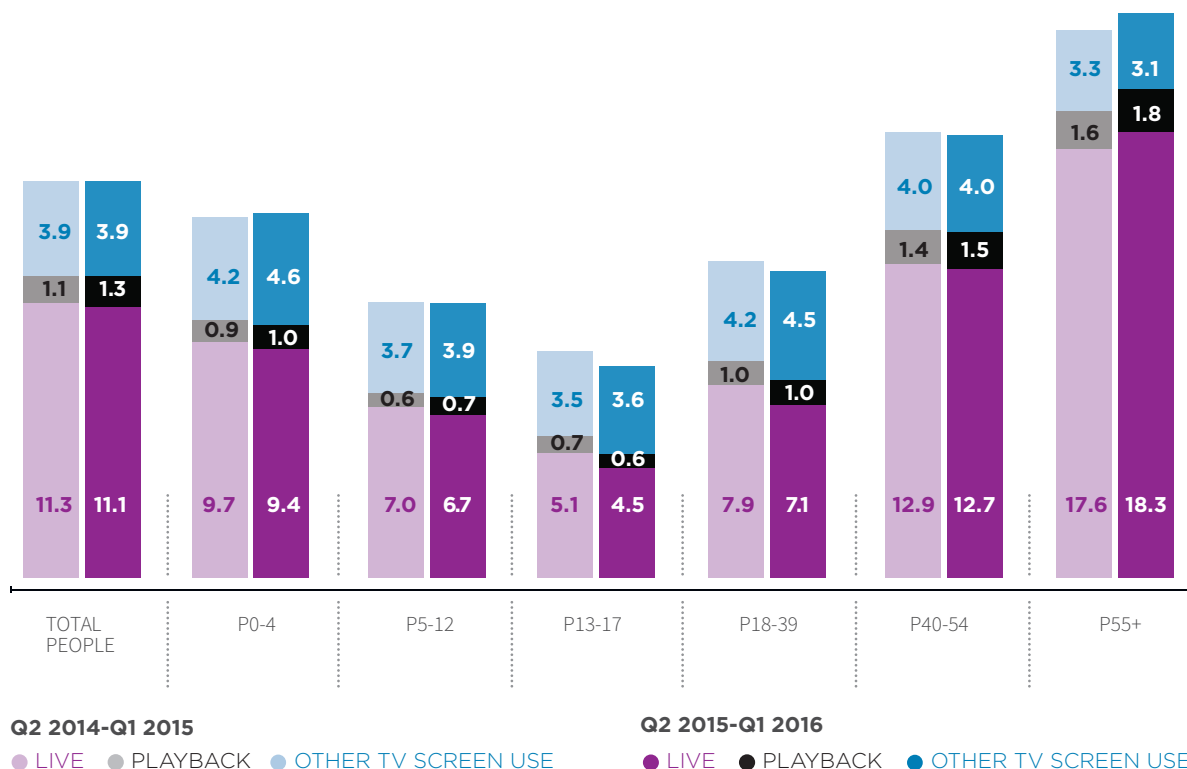
Australians' total use of the TV set was steady in the rolling four quarters to Q1 2016 compared to the same period a year ago.

Live viewing fell from 11.3 to 11.1 per cent TARP. Playback (within seven days of original broadcast up to and including Q4 2015; and in Q1 2016 up to 28 days from original broadcast) was 1.3 per cent TARP; the addition of 8-28 day playback viewing in Q1 2016 contributed to an increase in the latest rolling four quarters of .2 per cent TARP compared to the prior corresponding period.

Playback between eight and 28 days, and its contribution to overall broadcast viewing, is explored in the next section.

Australians aged 54 and younger watched slightly less live TV in the latest four-quarter period than they did a year earlier. Playback was steady or higher for all major age groups other than 13-17s, where it declined by .1 per cent TARP year-on-year. Teens also devoted a greater proportion of their TV screen time to other use than their older and younger counterparts.

TARP % BY DEMOGRAPHIC



Playback is broadcast content played back through the TV set at normal speed within either 7 or 28 days of original broadcast. Playback up to and including Q4 2015 is to 7 days, Q1 2016 includes up to 28 days.



'Longer-tail' viewing and other television screen use in Q1 2016

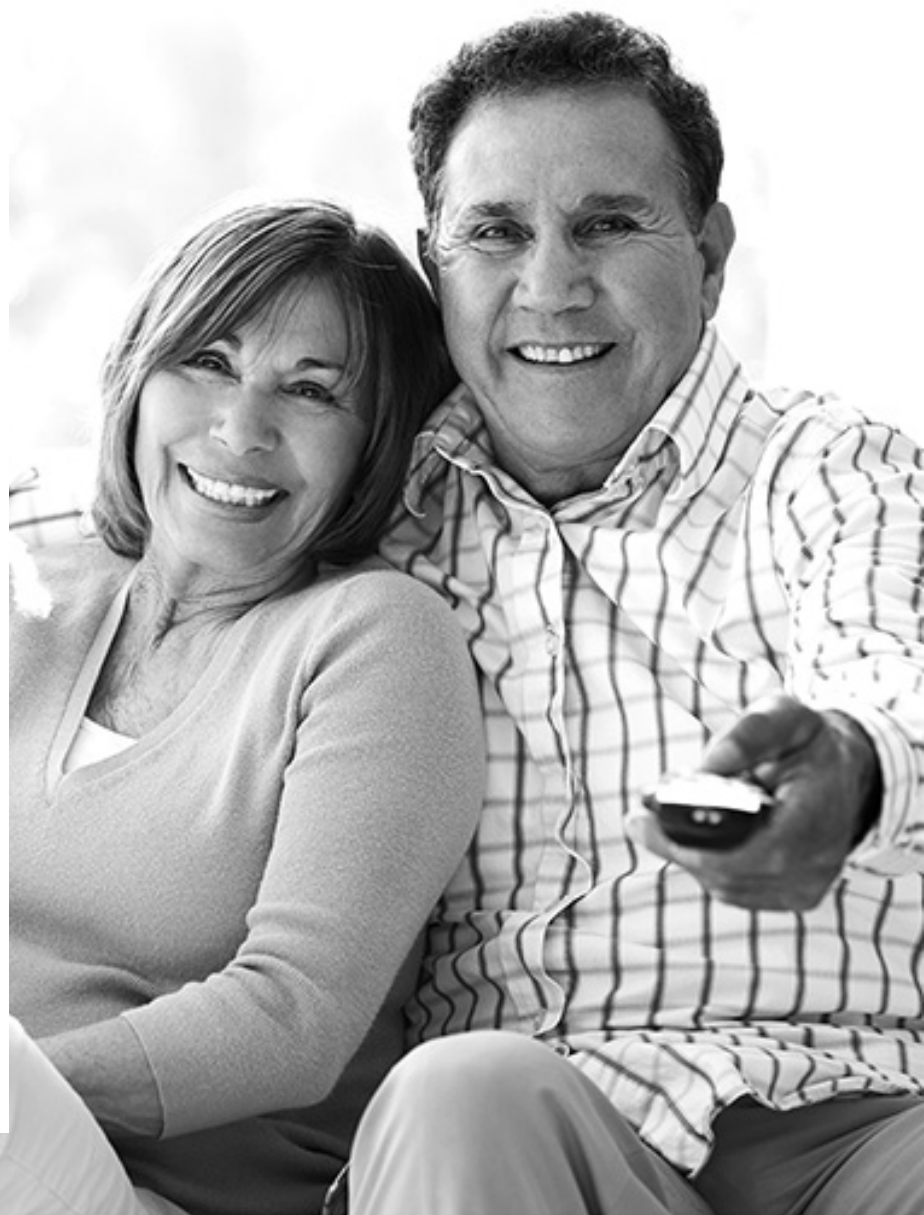
The changing nature of how Australians use their TV sets is evident across the day and, particularly, in prime time.

On an all-day basis, other TV screen use went from 30 hours and 37 minutes (30:37) per Australian each month in Q1 2015 *including* 8-28 day playback viewing to 30:38 per month *excluding* 8-28 day playback in the latest quarter; this reflects continued growth in non-broadcast viewing and other activities on the TV screen. On the same basis, in prime time other TV screen use rose by 32 minutes.

The addition of 8-28 day viewing saw playback across the day reach 9:07[^] per Australian per month. Including 8-28 day playback saw the average time spent viewing broadcast TV each month in prime time in Q1 2016 at 45:18.

Year-on-year total TV screen use fell by 2 hours and 46 minutes (2:46) on average per month across the day, and by 1:38 in prime time, reflecting the decline in broadcast viewing.

Overall, OzTAM and Regional TAM data show 1.6 per cent of broadcast viewing across the day in Q1 2016 was played back (time-shifted) through in-home TV sets between eight and 28 days of the program first going to air. In prime time, the proportion rose to 2.1 per cent.





	0200-2600		1800-2400	
	Q1 2015	Q1 2016	Q1 2015	Q1 2016
WATCHING TV IN THE HOME	89:28	86:36	47:30	46:09
Watching live TV	81:57	77:44	42:46	40:25
Watching playback* to 7 TV	7:31	7:28	4:44	4:44
Watching playback* to 28 TV	n.a.	8:52	n.a.	5:43
	Q1 2015	Q1 2016	Q1 2015	Q1 2016
TOTAL TV SCREEN USE	120:16	117:30	60:32	58:54
Watching live TV	81:57	77:44	42:46	40:25
Watching playback^ to 7 TV	7:42	n.a.	4:43	n.a.
Watching playback^ to 28 TV	n.a.	9:07	n.a.	4:53
Other screen use (inclusive of 8-28 Playback^ viewing)	30:37	n.a.	13:02	n.a.
Other screen use (exclusive of 8-28 Playback^ viewing)	n.a.	30:38	n.a.	13:34

* Playback 'what watched' TV || ^ Playback 'when watched' TV

Q1 2016 playback figures are to 28 days || Q1 2015 playback figures are to 7 days.

Q1 2016 Other screen use excludes 8-28 day playback || Q1 2015 Other screen use includes 8-28 day playback.

EXPLAINING WHAT WATCHED AND WHEN WATCHED

'Total TV Screen Use' – as detailed in the monthly time spent table above – does not equal the sum of 'Watching TV in the home' and 'Other screen use' because the playback base is different. 'Total TV screen use' = live + playback when watched (i.e., playback within seven or 28 days at the time it is actually viewed) + 'Other screen use'. Watching TV in the home = live + playback of what is watched [i.e., viewing of broadcast content within seven or 28 days is attributed back to the time at which the program actually went to air ('Consolidated' viewing).] For example: Program X airs on Sundays at 20.30. A viewer watches this program at midday on Tuesday. In when watched, the playback activity would be at midday on Tuesday. In what watched, the playback viewing would be attributed back to 20.30 on Sunday.



As noted earlier in this report, every connected device is a PVR. Not only does this allow people to catch up on their favourite TV programs wherever they have an internet connection, it also means they can spread out the time period in which they view.

Approximately 1 per cent of all broadcast TV content in the quarter was internet-delivered catch up viewing on connected devices, as captured by OzTAM's Video Player Measurement (VPM) service.

While most playback and VPM viewing happens within a few days of the related broadcast, 8-28 day viewing can be a substantial portion of the total audience to some individual program episodes.

Together, 8-28 day time-shifted viewing on TV sets and VPM viewing on connected devices comprised 2.5 to 3 per cent of all broadcast TV consumed in an average four-week period during Q1 2016.

As is customary in the Q1 edition of the Multi-Screen Report, the next sections explore Australians' use of one or more devices simultaneously while watching television, the devices they use most often for particular activities, and the top activities they undertake on various devices.





Simultaneous screen use

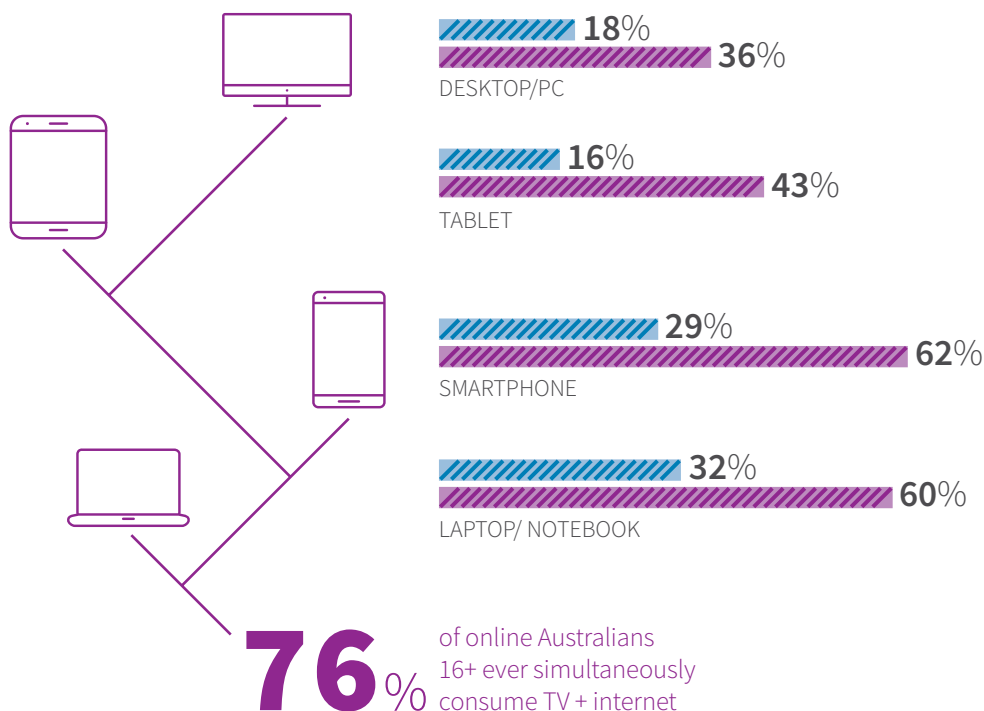
Multi-screening (using a connected device at any time while watching television) is a relatively standard practice among online Australians. Nielsen's annual Australian Connected Consumers Report shows that 76 per cent of online Australians aged 16 and older ever watch TV and use the internet simultaneously – a similar figure to the past few years. Frequency of multi-screening has been slowly increasing, with 37 per cent of multi-screenerers now doing so every day and 87 per cent doing so at least once a week.

Triple-screening (watching TV and using two other devices at the same time) has also been growing at a steady pace, from 31 per cent in 2014 to 33 per cent in 2015.

Females still multi-screen to a greater extent than males (78 per cent vs 75 per cent) although the gap seen in previous years is closing. Multi-screening is highest among consumers under 35 years of age, where nine in 10 say they do so.

While online Australians have consistently used laptops most

often for multi-screening in the last four years, the preference gap to mobile phones has declined significantly: from 27 per cent in 2012 to a small gap of 3 per cent in 2015. Over the same period desktops have also declined in multi-screening use (by 8 percentage points to 18 per cent now), while tablets appear to have stabilised at around 16 per cent for the past three years.



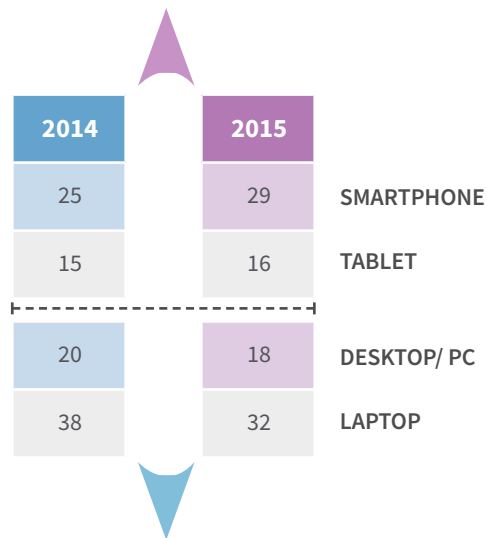
○ Use most often ○ Use regularly

*Please note the survey question specified 'mobile' phone and therefore the results discussed in this section of the report could include some people using an internet-capable non-smartphone.



Use most often

Similar to previous years, popular activities across devices vary greatly. Computers are still where many of the various online activities occur, with the most common including email, search and banking. Activities on smartphones and tablets are increasing, with the most popular online activities on smartphones continuing to be related to travel, such as accessing maps and directions, checking the weather, and other small frequent tasks. Key activities on tablets include tasks similar to those that are popular on computers, with search, email and news the most common. Social media is a more prominent activity on both smartphones and tablets, while online video is more popular on computers and tablets due to larger screen sizes.



Source: Nielsen Australian Connected Consumers Report 2016



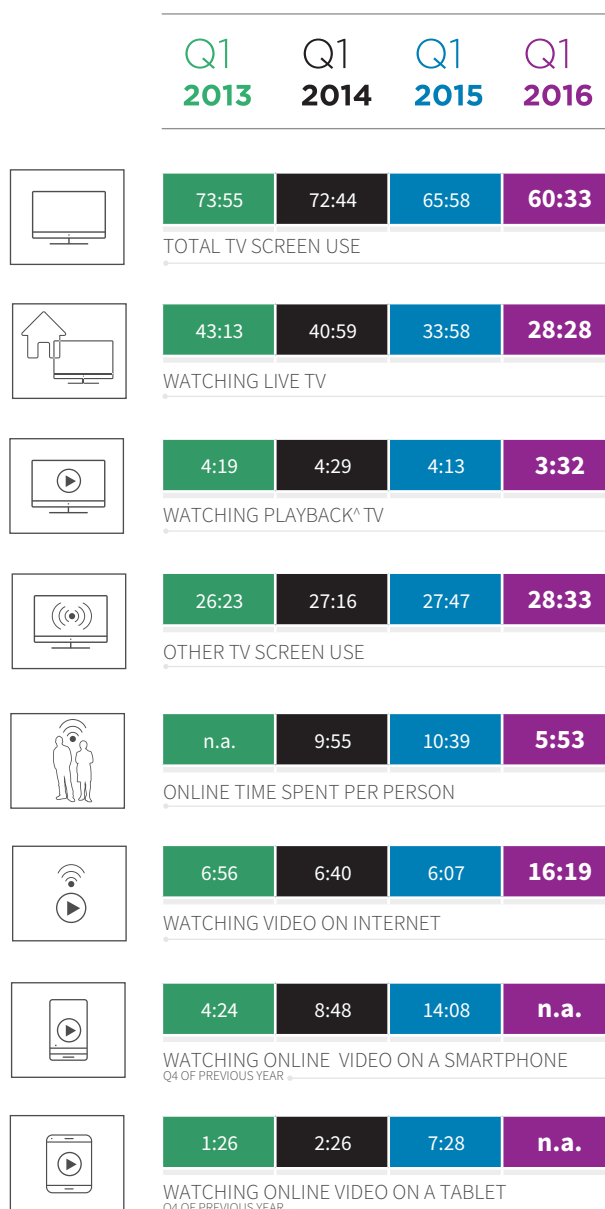
TOTAL PEOPLE

DESKTOP/LAPTOP	SMARTPHONE	TABLET
1 Email	=1 Maps/directions	1 Search
2 Search	=1 Weather	2 Email
3 Banking/bill payment	3 Email	3 News
4 News	4 Search	4 Weather
5 Researching or comparing products/services/businesses	5 Updating your social media profile or browsing others'	=5 Updating your social media profile or browsing others'
=6 Weather	6 News	=5 Maps/directions
=6 Maps/directions	7 Travel/transport information	=5 Researching or comparing products/services/businesses
8 Updating your social media profile or browsing others'	8 Banking/bill payment	8 Watching online video
9 Travel/transport information	9 Listening to streamed/downloaded music or radio	=9 Travel/transport information
=10 Watching online video	=10 Sporting news/information/results	=9 Banking/bill Payment
=10 Sporting news/information/results	=10 Researching or comparing products/services/businesses	



TEENS

Over the past four years teens have steadily spent a greater proportion of time with their TV sets on purposes other than watching live or playback TV, and by Q1 2016 just under half of their total TV screen use was on other screen activity. They also increased the amount of time they spend watching video on the internet by more than 10 hours per month year-on-year, to 16 hours and 19 minutes (16:19) in Q1 2016.



[^]When watched. Q1 2016 playback figures are to 28 days, previous years are to 7 days.
All figures are hh:mm per month.

PEOPLE 18-24

Nine in 10 online Australians aged 18-24 ever multi-screen, with smartphones being by far the most popular device (used most often) followed by laptops/notebooks, then desktop PCs.

Email is the most common online activity on smartphones and in the top three for computers and tablets. Search is the most common activity for both tablets and computers, the same as the previous year.

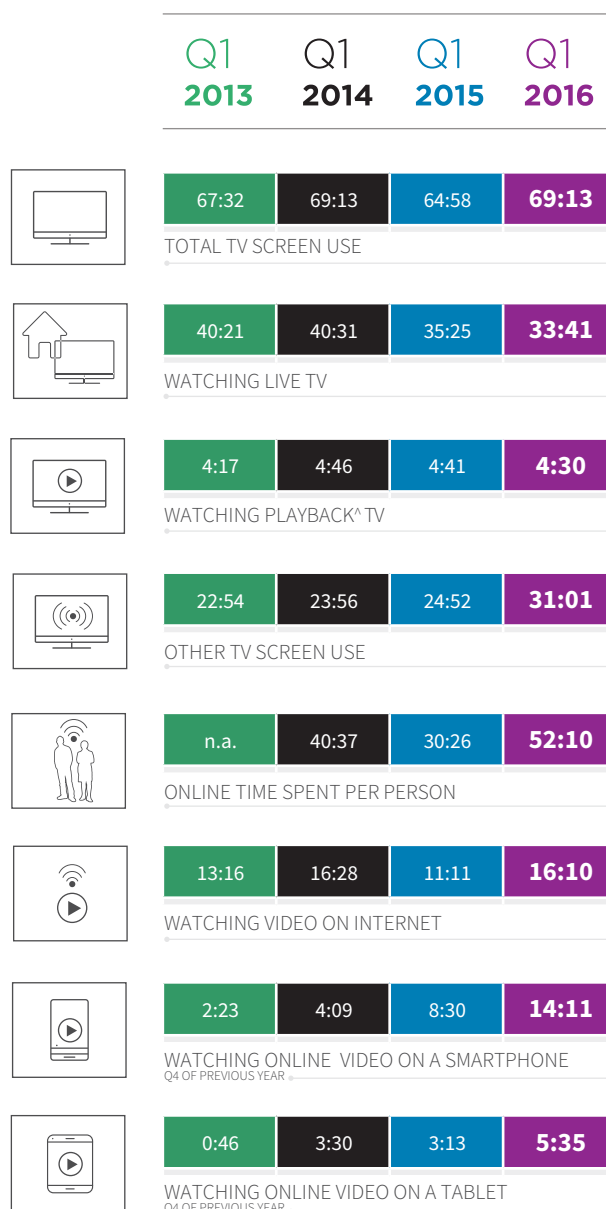
Watching online video remains the third most common activity on computers and second most common on tablets. However, for smartphone this drops from eighth to tenth compared to the previous year.



DESKTOP/LAPTOP	SMARTPHONE	TABLET
1 Search	1 Email	1 Search
2 Email	2 Maps/directions	2 Watching online video
3 Watching online video	3 Weather	3 Email
4 Banking/bill payment	4 Updating your social media profile or browsing others'	4 Updating your social media profile or browsing others'
=5 Researching or comparing products/services/businesses	5 Search	5 News
=5 Updating your social media profile or browsing others'	=6 Travel/transport information	6 Researching or comparing products/services/businesses
7 News	=6 Banking/bill payment	=7 Social TV (i.e., interacting with others/posting/reading comments about TV programs (incl sport) or movies as you are watching them/watched recently)
8 Listening to streamed/downloaded music or radio	8 Listening to streamed/downloaded music or radio	=7 Listening to streamed/downloaded music or radio
9 Travel/transport information	9 News	=7 Sporting news/information/results
10 Maps/directions	10 Watching online video	10 Banking/bill payment

PEOPLE 18-24

18-24s are spending a progressively larger proportion of their time with the TV set on other TV screen use, taking their total use of the TV set 4 hours and 15 minutes (4:15) higher per month year-on-year. They watch significantly more online video – particularly on PCs/laptops and smartphones – than they did a year earlier: in aggregate 35:56 per month.



[^]When watched. Q1 2016 playback figures are to 28 days, previous years are to 7 days.
All figures are hh:mm per month.

PEOPLE 25-34

Online Australians aged 25-34 are as likely to multi-screen as those aged 18-24, with nine in 10 saying they ever do so, higher than the 76 per cent average reported across the online Australian population aged 16+.

The 25-34 year-old age group uses smartphones most often for multi-screening, with almost half doing so. Laptops are the next most used device, although compared to phones this is falling.

For 25-34s search and email remain the top online activities, with search being the number one activity on computers and tablets, and email being in the top two on all three devices. Watching online video is the third most common activity on tablets (although down from second most common

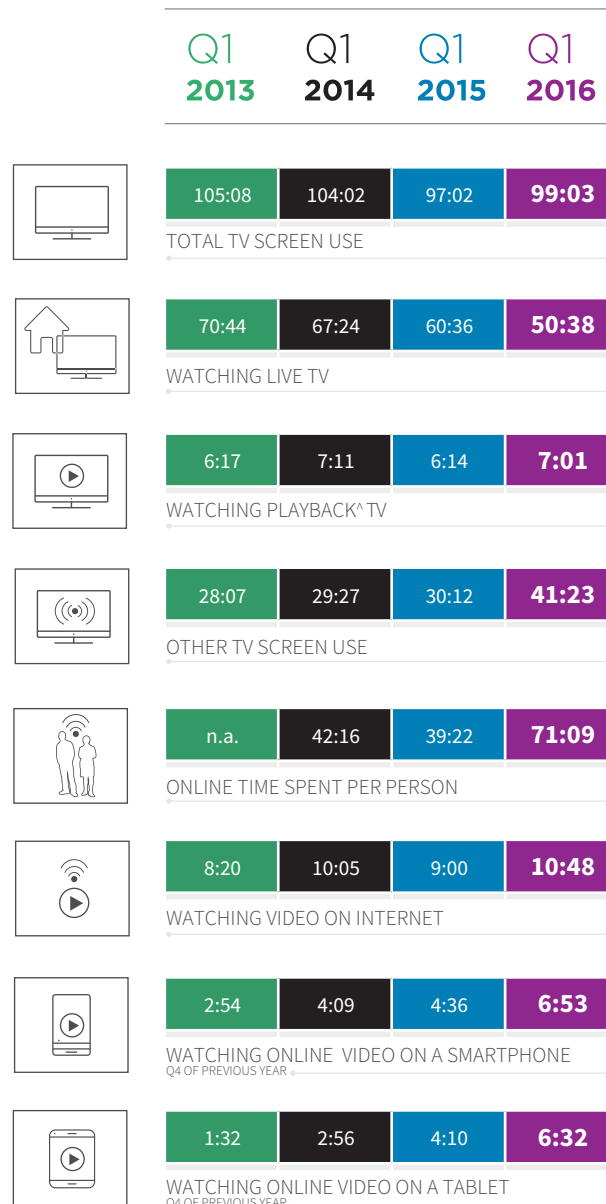
activity on tablets last year) and remains relatively low on both computers and smartphones (equal sixth and tenth place, respectively).



DESKTOP/LAPTOP	SMARTPHONE	TABLET
1 Search	1 Email	1 Search
2 Email	=2 Weather	2 Email
3 Banking/bill payment	=2 Maps/directions	3 Watching online video
4 Researching or comparing products/services/businesses	4 Search	4 Updating your social media profile or browsing others'
5 News	5 Updating your social media profile or browsing others'	5 News
=6 Watching online video	6 News	6 Researching or comparing products/services/businesses
=6 Updating your social media profile or browsing others'	7 Banking/bill payment	=7 Weather
8 Travel/transportation information	8 Travel/transport information	=7 Banking/bill payment
9 Weather	9 Researching or comparing products/services/businesses	9 Maps/directions
10 Maps/directions	10 Watching online video	10 Travel/transport information

PEOPLE 25-34

25-34 year-olds' other TV screen use jumped 11 hours and 11 minutes (11:11) per month year-on-year, the greatest absolute increase of any adult age group. They also spent more time watching video on a PC/laptop, smartphone or tablet than a year earlier, though less so than that reported by 18-24s.



[^]When watched. Q1 2016 playback figures are to 28 days, previous years are to 7 days.
All figures are hh:mm per month.

PEOPLE 35-49

While multi-screening is less frequent among people aged 35-49 than younger demographics, it is still common. 85 per cent of online 35-49 year-olds ever do so, a 3 per cent increase over the previous year.

In contrast to their younger counterparts, 35-49s use laptops most often for multi-screening. Smartphones are second, with tablets overtaking desktops as the third most used device.

The top online activities among 35-49s remain the same as last year: email and search are most popular on tablets and computers, and directions and checking weather most common on phones. Watching online video on tablets jumps to equal fourth place (from seventh in the

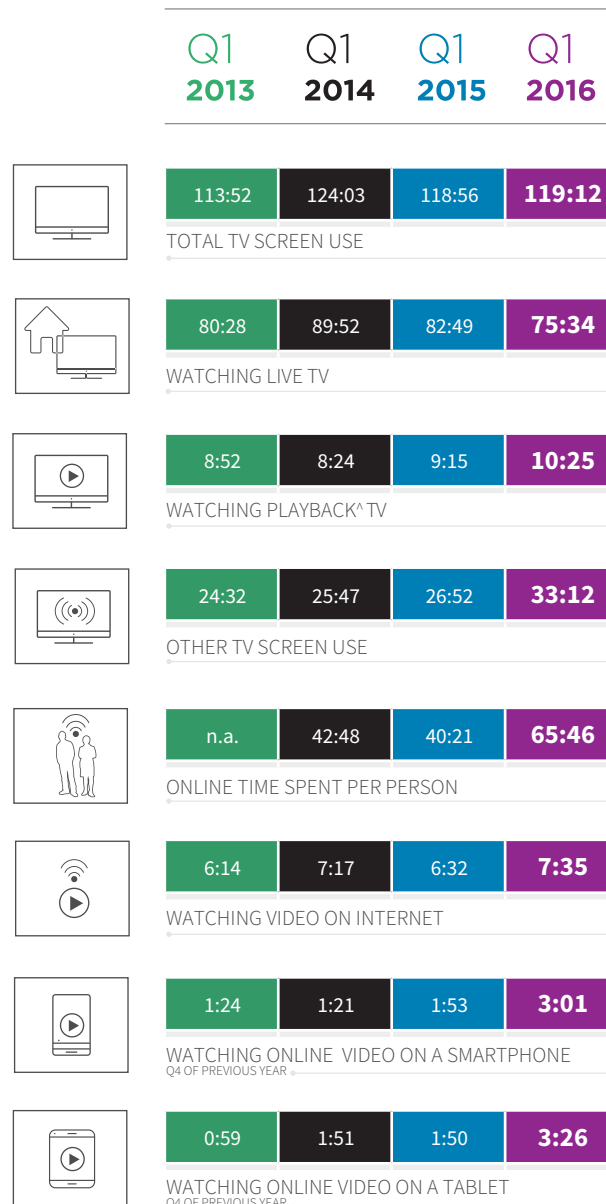
previous year) but remains tenth for computers and outside the top 10 for smartphones.



DESKTOP/LAPTOP		SMARTPHONE		TABLET	
1	Email	1	Maps/directions	1	Search
2	Conducting a search	2	Weather	=2	Email
3	Bank/bill payment	3	Email	=2	News
4	News	4	Search	=4	Weather
5	Researching or comparing products/services/businesses	5	Updating your social media profile or browsing others'	=4	Researching or comparing products/services/businesses
6	Weather	6	News	=4	Watching online video
=7	Maps/directions	7	Travel/transport information	7	Maps/direction
=7	Updating your social media profile or browsing others'	8	Banking/bill payment	8	Updating your social media profile or browsing others'
9	Travel/transport information	=9	Sporting news/information/results	=9	Banking/bill payment
10	Watching online video	=9	Listening to streamed/downloaded music or radio	=9	Travel/transportation information

PEOPLE 35-49

35-49s spent just under 86 hours each month in Q1 2016 watching live or playback TV. They watched 7 hours and 15 minutes (7:15) less live TV, though the amount of time they spent watching playback TV and on other TV screen use grew, taking their total TV screen use 16 minutes per month higher year-on-year. They spent more time watching video on a PC/laptop, smartphone or tablet than a year earlier, though their increase was less than that recorded by their younger counterparts.



[^]When watched. Q1 2016 playback figures are to 28 days, previous years are to 7 days.
All figures are hh:mm per month.

PEOPLE 50-64

70 per cent of online Australians aged 50-64 say they multi-screen. This is an increase of 5 per cent over the previous year. The device this age group uses most often is the laptop/notebook, followed by desktop PCs and then tablets. Contrary to younger demographics, 50-64s use smartphones least often to multi-screen.

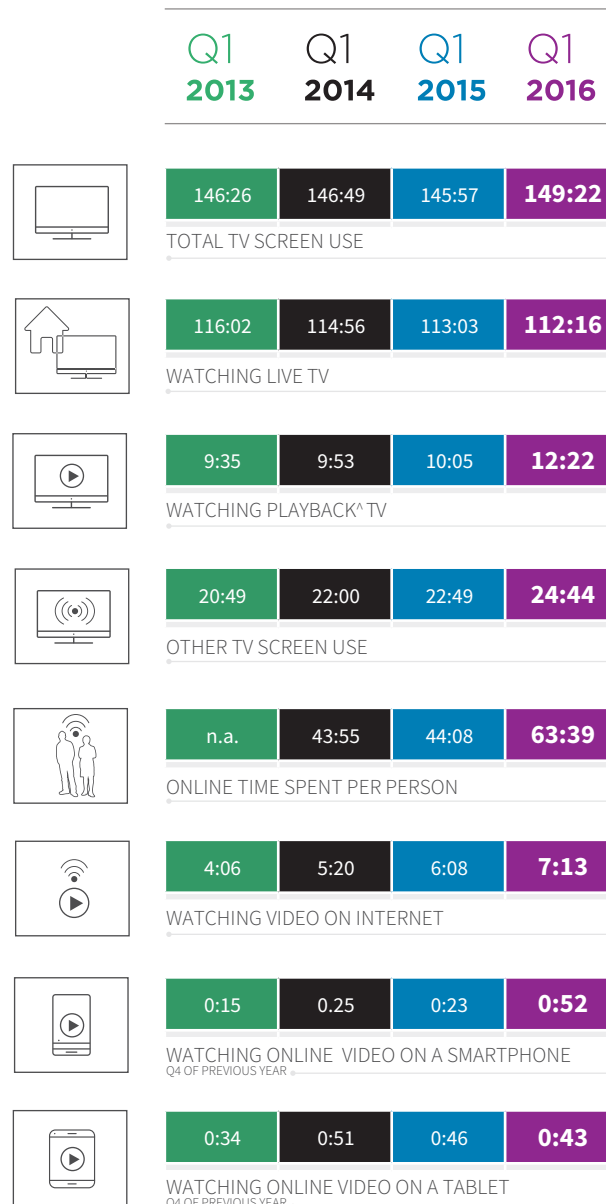
The 50-64 age group's most common online activities are email and search on computers and tablets, with directions and checking the weather most popular activities on smartphones. Online video viewing is outside the top 10 activities for all three devices.



DESKTOP/LAPTOP		SMARTPHONE		TABLET	
1	Email	=1	Maps/directions	=1	Email
2	Search	=1	Weather	=1	Search
3	Banking/bill payment	=3	Email	3	Weather
4	News	=3	Search	4	News
5	Weather	=5	News	5	Maps/directions
6	Researching or comparing products/services/businesses	=5	Travel/transport information	=6	Updating your social media profile or browsing others'
7	Maps/directions	7	Updating your social media profile or browsing others'	=6	Travel/transport information
8	Travel/transport information	=8	Banking/bill payment	8	Researching or comparing products/services/businesses
9	Updating your social media profile or browsing others'	=8	Sporting news/information/results	9	Banking/bill payment
10	Sporting news/information/results	10	Listening to streamed/downloaded music or radio	10	Sporting news/information/results

PEOPLE 50-64

As is the case among people aged 18-49, 50-64 year-olds spent more time with their TV sets in Q1 2016 than they did a year earlier (3 hours and 25 minutes more each month). The 47 fewer minutes per month they devoted to watching live TV was more than offset by an additional 2:17 per month on playback.



[^]When watched. Q1 2016 playback figures are to 28 days, previous years are to 7 days.
All figures are hh:mm per month.

PEOPLE 65+

Online Australians aged 65+ are less likely than other age groups to multi-screen: fewer than half report doing so (49 per cent), unchanged on the previous year. This is well below the 76 per cent across all online Australians 16+. Laptops are the device they use most often for multi-screening, followed by desktop PCs. Tablets are also commonly used, just below desktop PCs. Fewer than one in 10 online Australians 65+ say they use their smartphone most often to multi-screen.

Email and conducting a search are in the top two most common online activities for people 65+ on computers and tablets. Checking the weather is also a popular activity on all three devices (first on smartphones, second on tablets and fourth on computers).

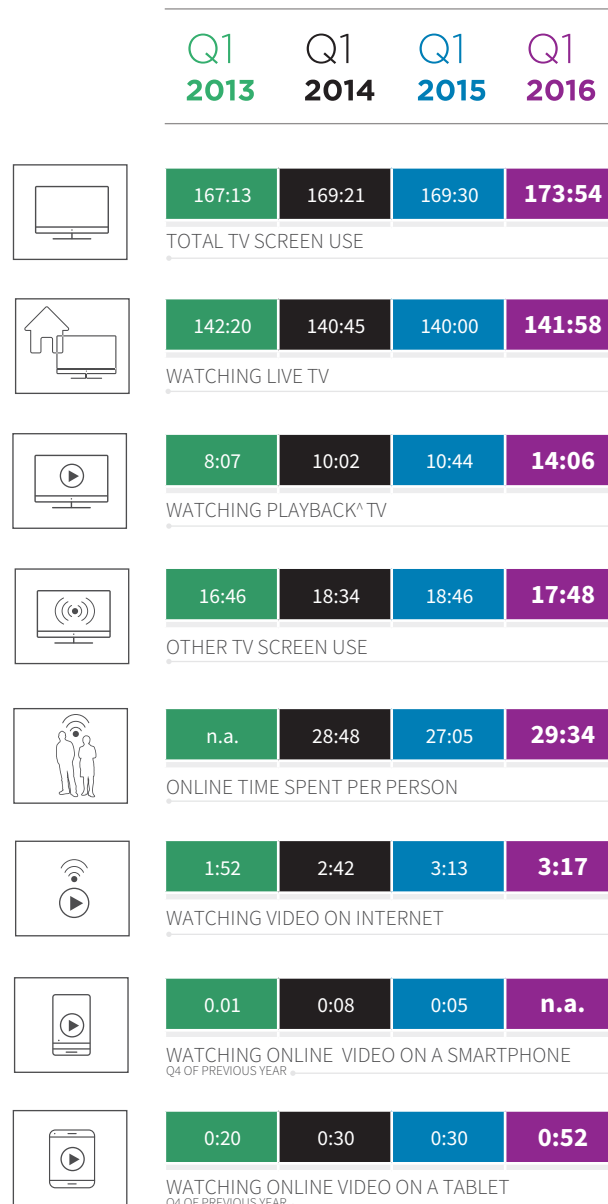
Watching online video is outside the top ten most common online activities for this age group.



DESKTOP/LAPTOP		SMARTPHONE		TABLET	
1	Email	1	Weather	1	Email
2	Search	2	Maps/directions	=2	Weather
3	Banking/bill payment	3	Email	=2	Search
4	Weather	=4	News	=4	News
5	News	=4	Search	=4	Maps/directions
6	Maps/directions	=6	Travel/transport information	6	Travel/transport information
7	Researching or comparing products/services/businesses	=6	Sporting news/information/results	=7	Updating your social media profile or browsing others'
8	Travel/transport information	=8	Banking/bill payment	=7	Researching or comparing products/services/businesses
9	Updating your social media profile or browsing others'	=8	Updating your social media profile or browsing others'	=9	Sporting news/information/results
10	Sporting news/information/results	10	Listening to streamed/downloaded music or radio	=9	Banking/bill payment

PEOPLE 65+

Australians aged 65+ spent more time watching live and playback TV in Q1 2016 than they did a year earlier (1:58 and 3:22 more per month, respectively). Though they were the only major age group to spend less time on other TV screen use, the rise in their live and playback viewing took their total use of the TV set 4:24 higher year-on-year.



[^]When watched. Q1 2016 playback figures are to 28 days, previous years are to 7 days.
All figures are hh:mm per month.



KEY OBSERVATIONS

TABLE 01 TECHNOLOGY PENETRATION	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016
Completely DTT: Penetration within TV households ¹ (Homes capable of receiving DTT on each working TV within the home)	96%	96%	97%	97%	97%
HD TV: Penetration within TV households (Homes capable of receiving HD DTT on each working TV within the home)	93%	94%	95%	95%	95%
Personal video recorder (PVR): Penetration within TV households	56%	57%	57%	58%	58%
2+ PVR: Penetration within TV households	15%	16%	16%	17%	17%
Internet Connection: Household penetration ²	80%	80%	80%	80%	81%
Tablets: Household penetration	47%	47%	49%	49%	49%
Internet capable TV in Home (Whether connected or not)	30%	30%	31%	32%	35%
Smartphones: People 14+ ³	76%	79%	80%	80%	81%

TABLE 02 MONTHLY TIME SPENT (HH:MM)	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016
Watching TV in the home ⁴	89:28	90:53	90:42	85:17	85:12
Watching Playback TV within 7 days	7:31	8:11	7:45	7:20	7:28
Online time spent per person ⁵	35:51	37:31	34:44	31:12	
					50:30
Watch video on Internet ⁶	6:57	7:32	7:48	8:23	8:33
Watching online video on a smartphone ⁷ Q4 2015	n.a.	n.a.	n.a.	4:18	n.a.
Watching online video on a tablet Q4 2015	n.a.	n.a.	n.a.	3:01	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 mobile and landline CATI ES. Estimate for internet capable TV in home refers to the capability to be internet connected, whether connected or not.

³ Source: Nielsen Online Ratings Establishment Survey, national population 14+.

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 7 data. Playback viewing is up to 7 days after broadcast. Includes free-to-air and subscription television viewing.

⁵ Source: Nielsen Online Ratings up to and including Q4 2015 - Hybrid Surfing. Estimate is the average of the 3 months within the calendar quarter. Figures include all online activities inclusive of PC applications such as iTunes, Skype etc. Digital Ratings Monthly (DRM) was launched to market on 31st March 2016 and leverages the hybrid methodology and fuses together PC, smartphone and tablet panels. The data should not be compared to the previous hybrid surfing service, Nielsen Online Ratings (NOR), as a trend break for all metrics was made upon launch of DRM. Q1 2016 data is for February-March 2016 only.

⁶ Source: Nielsen Online Ratings - Hybrid Streaming. Figures are national and for People 2+. Home and Work panel only.

⁷ Smartphone and tablet video source: Nielsen Australian Connected Consumers 2015-2016 (March 2016 edition) - 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. Figure relates to online video only.



TABLE O3

OVERALL USAGE (000S), MONTHLY REACH	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016
Watching TV in the home ⁸	22,158	22,193	22,175	22,154	22,323
Watching Playback TV within 7 days	11,769	12,226	12,103	12,343	12,339
Online unique audience ⁹	18,001	18,117	18,392	18,409	19,567
Watch video on Internet ¹⁰	13,343	13,711	13,352	13,017	13,030
Owning/using a smartphone ¹¹	14,662	15,406	15,639	15,647	16,183
Watching online video on smartphone ¹² Q4 2015	n.a.	n.a.	n.a.	4,065	n.a.
Watching online video on tablet Q4 2015	n.a.	n.a.	n.a.	2,710	n.a.

TABLE O4

A MONTH IN THE LIFE - Q1 2016	KIDS ¹³	TEENS ¹⁴	P18-24	P25-34	P35-49	P50-64	P65+	TOTAL PEOPLE
Watching TV in the home ⁸	55:36	31:17	37:22	56:19	84:12	122:38	153:48	85:12
Q1 2015	62:58	37:55	40:03	66:36	91:53	122:55	150:33	89:28
Watching Playback TV within 7 days	4:21	2:49	3:41	5:40	8:37	10:22	11:50	7:28
Q1 2015	4:38	3:57	4:37	5:59	9:04	9:52	10:33	7:31
Online time spent per person ⁹	3:41	5:53	52:10	71:09	65:46	63:39	29:34	50:30
Watch video on Internet ¹⁰	13:35	16:19	16:10	10:48	7:35	7:13	3:17	8:33
Watching online video on a smartphone ¹⁵ Q4 2015	n.a.	n.a.	14:11	6:53	3:01	0:52	n.a.	4:18
Watching online video on a tablet Q4 2015	n.a.	n.a.	5:35	6:32	3:26	0:43	0:52	3:01

⁸ Source: Combined OzTAM Metro and Regional TAM databases with overlap homes de-duplicated. 'Watching TV' and 'Watching Playback TV' are both based on Consolidated 7 data (0200-2600). Playback viewing is up to 7 days after broadcast.

⁹ Source: Nielsen Online Ratings up to and including Q4 2015 - Hybrid Surfing. Estimate is the average of the 3 months within the calendar quarter. Figures include all online activities inclusive of PC applications such as iTunes, Skype etc. Digital Ratings Monthly (DRM) was launched to market on 31st March 2016 and leverages the hybrid methodology and fuses together PC, smartphone and tablet panels. The data should not be compared to the previous hybrid surfing service, Nielsen Online Ratings (NOR), as a trend break for all metrics was made upon launch of DRM. Q1 2016 data is for February-March 2016 only.

¹⁰ Source: Nielsen Online Ratings - Hybrid Streaming. Figures are national and for People 2+. Home and Work panel only.

¹¹ Nielsen Online Ratings Establishment Survey, national population 14+.

¹² Nielsen Australian Connected Consumers report from 2015-2016 (March 2016 edition) - national figures produced annually citing 24% of the online population aged 16+ for mobile video and 16% for tablet video. Audience figure calculated using national online active audience of 16,939,000 from Nielsen Online Ratings (December 2015).

¹³ Combined Metro OzTAM and Regional TAM data defines 'Kids' aged 0-12 and Nielsen Digital Ratings Monthly (DRM) aged 2-11.

¹⁴ Combined Metro OzTAM and Regional TAM data defines 'Teens' aged 13-17, Nielsen Digital Ratings Monthly (DRM) aged 12-17 and Nielsen ACC aged 16-17.

¹⁵ Smartphone and tablet video source: Nielsen Australian Connected Consumers 2015-2016 (March 2016 edition). Online 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. Figure relates to online video only. Note: Due to low sample size, Teens demographic (aged 16-17 years) figures not reported, shown as N.A.



TABLE 4A A MONTH IN THE LIFE - BY QUARTER

KIDS¹²	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016
Watching TV in the home ⁸	62:58	64:25	64:58	59:23	55:36
Watching Playback TV within 7 days	4:38	4:58	4:56	4:35	4:21
Online time spent per person ⁹	4:40	5:42	5:12	4:47	
					3:41
Watching video on Internet ¹⁰	8:08	7:54	6:33	9:53	13:35

TEENS¹³	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016
Watching TV in the home ⁸	37:55	38:31	38:22	33:46	31:17
Watching Playback TV within 7 days	3:57	3:51	3:23	3:03	2:49
Online time spent per person ⁹	10:39	7:57	8:29	8:45	
					5:53
Watching video on Internet ¹⁰	6:07	3:39	8:06	14:06	16:19

P18 - 24	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016
Watching TV in the home ⁸	40:03	41:34	39:24	36:06	37:22
Watching Playback TV within 7 days	4:37	4:52	4:14	3:44	3:41
Online time spent per person ⁹	30:26	35:08	29:55	25:41	
					52:10
Watching video on Internet ¹⁰	11:11	14:58	15:15	19:59	16:10
Watching online video on a smartphone ¹⁵ Q4 2015	n.a.	n.a.	n.a.	14:11	n.a.
Watching online video on a tablet ¹⁵ Q4 2015	n.a.	n.a.	n.a.	5:35	n.a.

P25 - 34	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016
Watching TV in the home ⁸	66:36	65:52	61:31	56:44	56:19
Watching Playback TV within 7 days	5:59	6:43	5:56	5:36	5:40
Online time spent per person ⁹	39:22	39:30	37:24	35:16	
					71:09
Watching video on Internet ¹⁰	9:00	7:37	9:07	9:30	10:48
Watching online video on a smartphone ¹⁵ Q4 2015	n.a.	n.a.	n.a.	6:53	n.a.
Watching online video on a tablet ¹⁵ Q4 2015	n.a.	n.a.	n.a.	6:32	n.a.



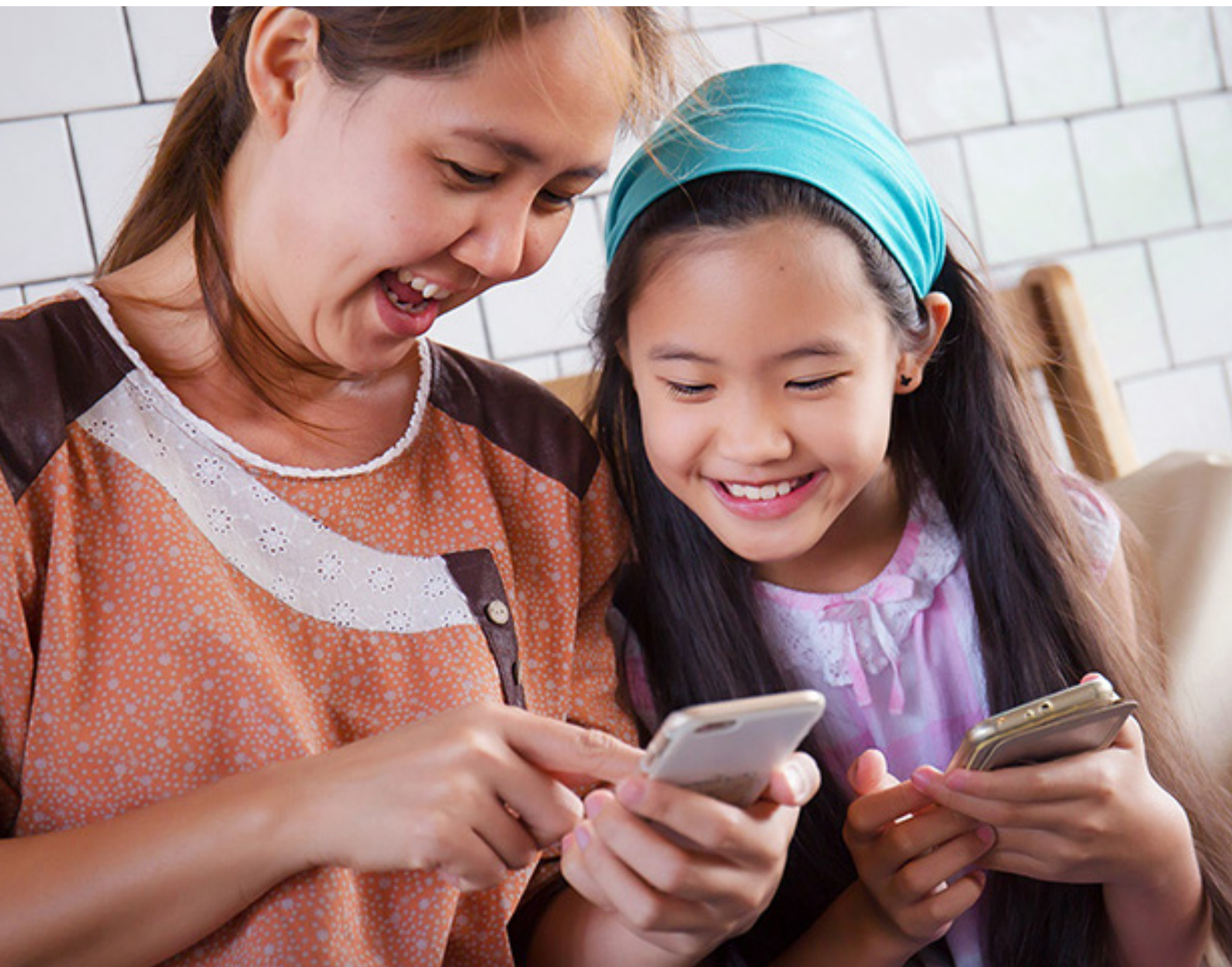
TABLE 4A A MONTH IN THE LIFE - BY QUARTER

P35 - 49	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016
Watching TV in the home ⁸	91:53	92:54	93:12	86:15	84:12
Watching Playback TV within 7 days	9:04	9:42	9:01	8:46	8:37
Online time spent per person ⁹	40:21	41:37	39:40	34:27	
					65:46
Watching video on Internet ¹⁰	6:32	7:34	8:09	7:45	7:35
Watching online video on a smartphone ¹⁵ Q4 2015	n.a.	n.a.	n.a.	3:01	n.a.
Watching online video on a tablet ¹⁵ Q4 2015	n.a.	n.a.	n.a.	3:26	n.a.
P50 - 64	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016
Watching TV in the home ⁸	122:55	126:13	126:51	120:48	122:38
Watching Playback TV within 7 days	9:52	10:49	10:33	9:44	10:22
Online time spent per person ⁹	44:08	46:59	42:29	38:01	
					63:39
Watching video on Internet ¹⁰	6:08	7:06	5:45	5:51	7:13
Watching online video on a smartphone ¹⁵ Q4 2015	n.a.	n.a.	n.a.	0:52	n.a.
Watching online video on a tablet ¹⁵ Q4 2015	n.a.	n.a.	n.a.	0:43	n.a.
P65+	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016
Watching TV in the home ⁸	150:33	152:36	155:33	150:51	153:48
Watching Playback TV within 7 days	10:33	11:53	11:36	11:18	11:50
Online time spent per person ⁹	27:05	28:43	28:35	27:46	
					29:34
Watching video on Internet ¹⁰	3:13	3:35	4:31	3:55	3:17
Watching online video on a smartphone ¹⁵ Q4 2015	n.a.	n.a.	n.a.	n.a.	n.a.
Watching online video on a tablet ¹⁵ Q4 2015	n.a.	n.a.	n.a.	0:52	n.a.
TOTAL PEOPLE	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016
Watching TV in the home ⁸	89:28	90:53	90:42	85:17	85:12
Watching Playback TV within 7 days	7:31	8:11	7:45	7:20	7:28
Online time spent per person ⁹	35:51	37:31	34:44	31:12	
					50:30
Watching video on Internet ¹⁰	6:57	7:32	7:48	8:23	8:33
Watching online video on a smartphone ¹⁵ Q4 2015	n.a.	n.a.	n.a.	4:18	n.a.
Watching online video on a tablet ¹⁵ Q4 2015	n.a.	n.a.	n.a.	3:01	n.a.



TABLE 05 VIDEO AUDIENCE COMPOSITION (BY AGE AND GENDER)

Q1 2016	KIDS	TEENS	P18-24	P25-34	P35-49	P50-64	P65+	FEMALES	MALES
On Traditional TV ⁸	11%	2%	4%	10%	20%	26%	27%	53%	47%
Q1 2015	12%	3%	4%	11%	21%	25%	25%	53%	47%
On Internet ¹⁰	3%	3%	8%	17%	29%	25%	14%	49%	51%
Q1 2015	4%	4%	10%	19%	28%	23%	11%	51%	49%



Explanatory Notes

- Estimates for the average number of TVs and mobiles in homes are based on OzTAM Metro and Regional TAM Establishment Surveys. Tablet and PC estimates are based on OzTAM Metro and Regional TAM long Establishment Surveys using hybrid estimates of incidence per home covered by full Household Information/ Household Update surveys.
- 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 in Tables 1-4, and report copy referencing those figures, is defined as television broadcast content recorded and viewed (played back) within seven days of the original broadcast time. Where used, playback to 28 days (or, 'Consolidated 28') data is noted as such.
- Other Screen Use is TV screen use that excludes live and playback viewing of broadcast television within 28 days of the original broadcast time. It can include non-broadcast activities such as gaming, online activity on the TV screen, watching DVDs and playing back recorded TV content beyond 28 days from original broadcast.
- Please note 'Total TV screen use' does not equal the sum of 'Watching TV in the home' and 'Total other screen use' because the playback base is different. 'Total TV screen use' = live + playback when watched (i.e., playback within 28 days at the time it is actually viewed) + 'Total other screen use'. Watching TV in the home = live + playback of what is watched (viewing of broadcast content within 28 days is attributed back to the time at which the program actually went to air: in other words Consolidated 28 viewing).
- Average time spent viewing (ATV) is calculated as the daily



Explanatory Notes

- 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 Consumers Report March 2016 (ACC) based on online national population aged 16+. Due to small sample size self-reported time spent viewing any video on a smartphone or tablet, and top activities by device, for teens are not available.
 - Smartphone ownership and usage sourced from Nielsen Online Ratings Establishment Survey (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 define '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 Consumers report defines 'Teens' as respondents aged 16-17 and 'Male' / 'Female' respondents aged 16+.
 - OzTAM's VPM Report captures minute-by-minute viewing of participating broadcasters' online 'catch up TV' content played to connected devices such as tablets, smartphones, smart TVs, games consoles and PCs/laptops. While OzTAM's VPM reporting service captures live streaming, VPM figures referenced in the Multi-Screen Report are for catch up viewing only.
 - 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 replaced with the new metric of 'online time spent'. Online time spent is inclusive of all online activities including PC applications (e.g. iTunes, Skype, etc).
 - February 2016 marks a trend break as a result of a change over to the new IAB Australia endorsed total digital audience currency, Nielsen Digital Ratings (Monthly). This new currency replaces the previous currency, Nielsen Online Ratings – Hybrid Surfing, moving forward. Nielsen Online Ratings – Hybrid Surfing remains data of record up to and including January 2016. Nielsen Online Ratings – Hybrid Streaming continues as the source of data for video streaming measurement and complements Nielsen Digital Ratings (Monthly) as currency.





For more information



OZTAM

DOUG PEIFFER

Chief Executive Officer, OzTAM
doug.peiffer@oztam.com.au

MARGARET FEARN

Principal, Fearnace Media
margaret@fearnacemedia.com

REGIONAL TAM

DEBORAH WRIGHT

Chairperson, Regional TAM
dwright@nbnbtv.com.au

NIELSEN

CRAIG JOHNSON

Head of Reach Solutions
SEANAP, Nielsen
cr.johnson@nielsen.com



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