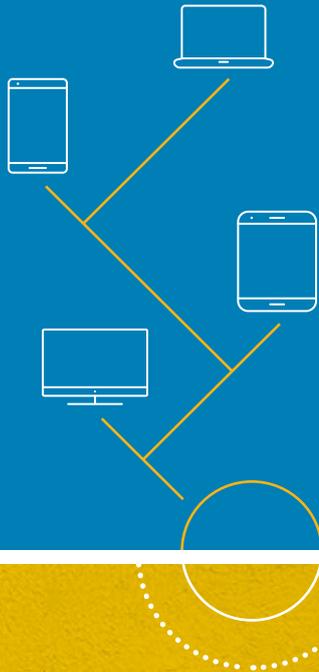


AUSTRALIAN MULTI-SCREEN REPORT

QUARTER 02 2016



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Australian viewing trends across multiple screens

Since its introduction in Q4 2011, The Australian Multi-Screen Report has tracked the impact of digital technologies, new channel and platform choices, and take-up of connected devices on audience behaviour.

Successive issues have explored broadcast TV viewing trends – recognising Australians are heavy television consumers and increasingly watch at a time, place and on a device of their choosing – along with the range of other video viewing and screen-based activities that new technologies enable.

Most households now own numerous screens, the majority internet-capable and many

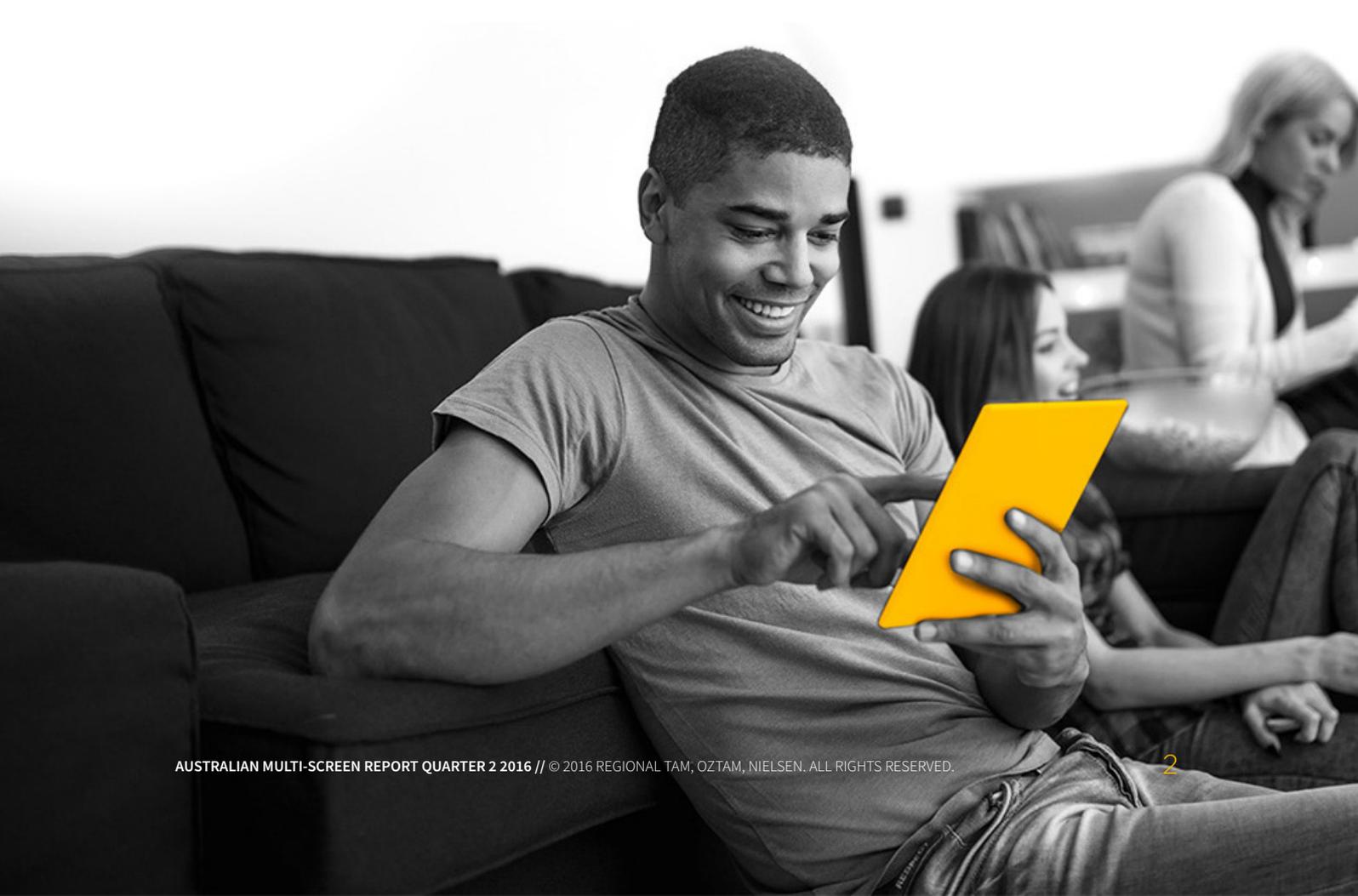
portable. This encourages people to spread their screen time across multiple options. With the number of hours in the day remaining fixed however, evolving viewing patterns reflect the collective influence of platform and device choice, rather than one activity replacing another.

This is evident in the times of day at which Australians most often use their TV sets and other connected devices to watch video content. It is particularly apparent in the evenings, when people generally have the most time and opportunity to view.

This latest issue of The Australian Multi-Screen Report (Q2 2016) examines such ‘shape of day’

activity in the section ‘Broadcast content viewed on TV sets and connected devices across the day’, drawing on OzTAM’s Video Player Measurement (VPM) Report data.

This edition also continues its look at total TV screen use: while broadcast TV viewing remains strong overall (Australians on average view approximately 90 hours each per month) an increasing proportion of time spent with the TV set goes to other activities, enabled by take-up of internet-capable TVs and devices attached to the set.



New in the Q2 2016 Australian Multi-Screen Report

Over the past five and a half years, the Multi-Screen Report has evolved as new and better audience insights become available. In the spirit of continual improvement, this issue incorporates **Consolidated 28 viewing** (broadcast TV material watched live or played back through the TV set within 28 days) for Q1 and Q2 2016. This follows the introduction of 8-28 day playback viewing in the OzTAM and Regional TAM databases from the start of the 2016 ratings year.

While the majority of playback activity happens within the first seven days of broadcast, 1.8 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 later. In prime time the proportion of 8-28 day playback is 1.7 per cent.

Playback to 7 and playback to 28 (and Consolidated 7 and Consolidated 28) data are labeled as such. Please note however that as 8-28 data are not available for prior years, any comparisons between 2016 and earlier years should make the respective playback bases

clear and highlight applicable differences (e.g., “Q2 2016 includes playback to 28; Q2 2015 includes playback to 7 only”.)

To illustrate the impact of viewing at the time it actually takes place, this issue also expands on the concept of **‘when watched’**^A TV viewing in the sections ‘Viewing across devices’ (pages 6-7); the section ‘Broadcast content viewed on TV sets and connected devices across the day’ (pages 14-19); and also updates ‘when watched’ data for Q2 in ‘Total use of the television set’ (pages 10-11)

In the daily 24 hours available, ‘when watched’ data show the times at which people actually view broadcast TV content *through the television set*. Broadcast video viewing *through connected devices* at the time it takes place is explored in the ‘shape of day’ section of this report. ‘When watched’ TV viewing data yield slightly different time spent figures than the more familiar **‘what watched’** (or time-shifted) figures, where playback viewing is attributed back to the original broadcast.

To understand the difference between ‘when watched’^A and ‘what watched’^{*}, take the example of Program X, which 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. OzTAM and Regional TAM Consolidated 7 and Consolidated 28 viewing databases use ‘what watched’, which remains the basis for time-shifted viewing figures, and features in the time spent viewing TV figures for Q1 and Q2 2016 in tables 2, 4 and 4a at the end of this report.

To make data for time spent viewing video online directly comparable with TV data, the ‘Video viewing, average time spent per month’ infographic has been updated to include both per viewer and per person figures. The active online universe remains Nielsen currency, and the tables at the end of the Multi-Screen Report feature per active user data, as noted. For more on per person/per viewer, please see Appendix on pages 27-29.

Technology in Australian homes

Over the past several quarters, the Multi-Screen Report has shown penetration rates for new technologies slow, even as the number of devices present in homes rises. This is occurring because households have comparatively rapid adoption of devices in their early stage of release, and also as many people when upgrading a device will retain the older model for secondary use.

Year-on-year, **internet-capable televisions** ('smart' or 'hybrid' TVs) have seen the fastest take-up: 36 per cent of Australian homes now have one (whether connected or not), compared to 30 per cent in Q2 2015.

81 per cent of Australians aged 14+ own a **smartphone**, up from 79 per cent in Q2 2015.

49 per cent of homes have at least one **tablet** device, which is steady on the past three quarters and 2 percentage points higher than a year earlier.

Every Australian TV home can receive **digital terrestrial television** (DTT) channels. In 97 per cent of homes every working TV set can access DTT channels, while in 96 per cent of homes every TV set is **high definition** (HD)-capable.

59 per cent of homes have a **personal video recorder** (PVR); 17 per cent have two or more.

81 per cent of homes have an **internet connection**, and this penetration level has been steady over the past three-and-a-half years.





TECHNOLOGY PENETRATION

Q2 2013 Q2 2014 Q2 2015 Q2 2016

89% 94% 96% 97%



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

n.a n.a 94% 96%



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

54% 55% 57% 59%



PERSONAL VIDEO RECORDER (PVR): PENETRATION WITHIN TV HOUSEHOLDS

14% 14% 16% 17%



2+ PVR: PENETRATION WITHIN TV HOUSEHOLDS

80% 80% 80% 81%



INTERNET CONNECTION: HOUSEHOLD PENETRATION

33% 42% 47% 49%



TABLETS: HOUSEHOLD PENETRATION

22% 27% 30% 36%



INTERNET CAPABLE TV IN HOME

65% 71% 79% 81%



SMARTPHONE: MOBILE PHONE SUBSCRIBERS*

*Source for Smartphone: Mobile Phone Subscribers: Nielsen Consumer & Media View, national population 16+ Q2 2013 and Q2 2014 and Nielsen Online Ratings Establishment Survey, national population 14+ Q2 2015 and Q2 2016

Viewing across devices

Even given extensive device, channel and platform choices, television remains the most-watched screen. Across the population as a whole, the greatest share of viewing occurs on TV sets.

On average, more than 88 per cent of Australians (20.67 million people) watch at least some **broadcast TV on in-home sets** (free-to-air and/or subscription channels) each week. Reach remains strong among all major age groups: for example, 72.3 per cent of 16-24 year-olds, traditionally among the lightest TV viewers, watch weekly.

BROADCAST TV VIEWING ON IN-HOME TV SETS EACH WEEK

	Q2 2015 CONSOLIDATED TO 7 DAYS	Q2 2016 CONSOLIDATED TO 28 DAYS	Q2 2016 CONSOLIDATED TO 28 DAYS
	% REACH	% REACH	WEEKLY AVERAGE CUMULATIVE REACH
TOTAL PEOPLE	88.3	88.1	20.67m
KIDS	89.6	88.8	3.4m
TEENS	80.5	79.3	1.14m
P16-24	73.6	72.3	1.6m
P25-39	84.2	81.8	2.86m
P40-54	91.6	91.7	4.32m
P55-64	93.7	94.3	4m
P65+	93.3	94.8	3.37m

Average 1-minute **weekly** cumulative reach across the Australian population. OzTAM and Regional TAM. Includes live viewing and playback through the TV set within 28 days (Q2 2016) and playback through the TV set within seven days (Q2 2015).

Please note the differing playback bases if making year-on-year comparisons, as explained in 'New in the Q2 2016 Report', on page 3.



Isolating broadcast TV viewed on in-home sets:

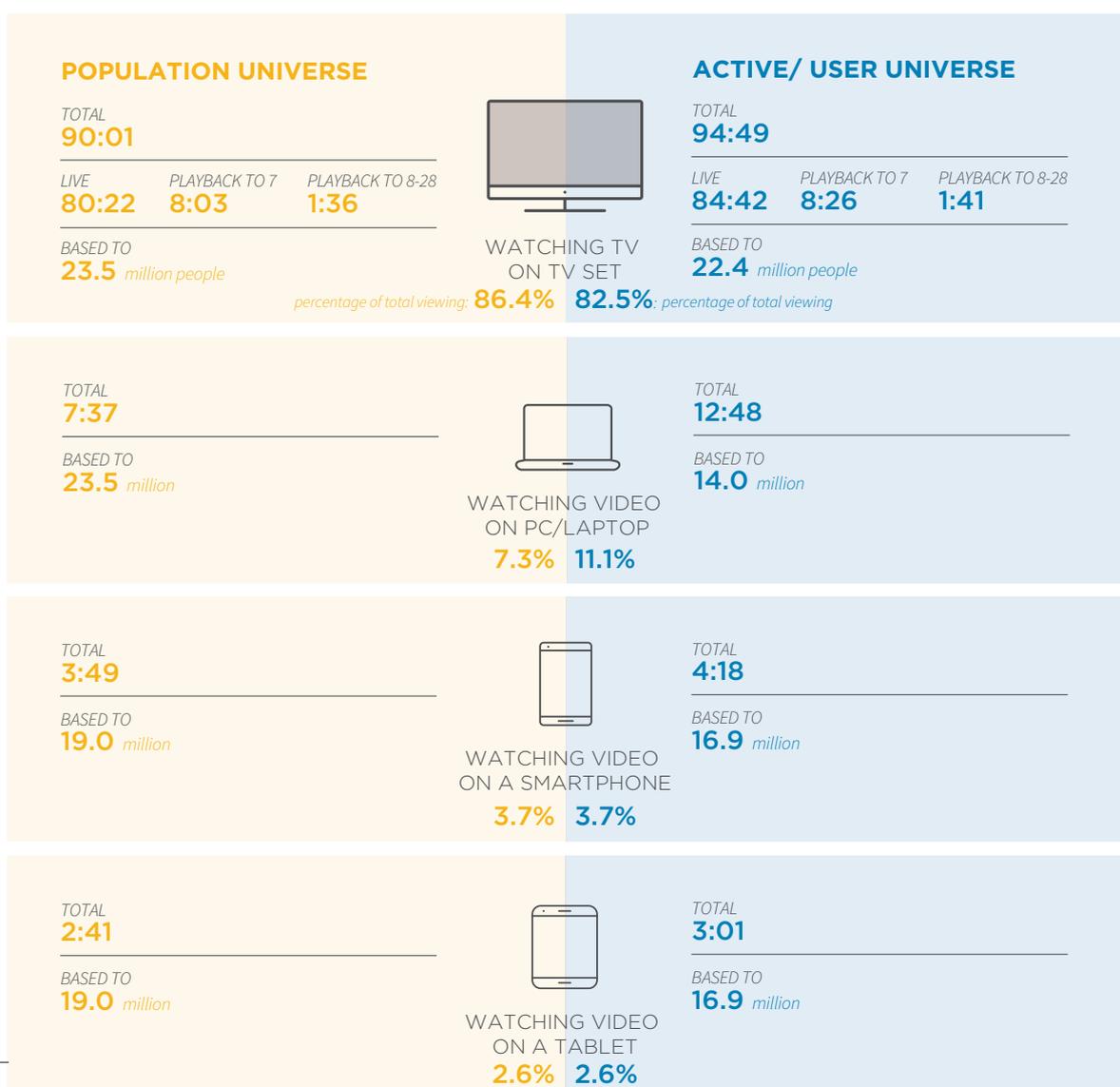
across the population as a whole 89.3 per cent [80 hours and 22 minutes (80:22)] is watched live-to-air each month[^], with 8.9 per cent (8:03) played back within seven days and 1.8 per cent (1:36) played back between eight and 28 days after the original broadcast.

Looking across all screens, devices and types of video across the population as a whole:

86.4 per cent of viewing (90:01)[^] is TV content watched on in-home sets within 28 days of original broadcast. Looking at only viewers or users in the respective TV and online active universes, TV viewing accounts for 82.5 per cent of viewing, as illustrated in the graphic, 'Video viewing, average time spent per month' below.

VIDEO VIEWING, AVERAGE TIME SPENT PER MONTH (HH:MM)

TV // PC // SMARTPHONE // TABLET



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



The figures above show both the population universe (per person, across the Australian population as a whole) and also per viewer or active user (active universes), as noted. Please see Appendix for details. **Time spent watching TV** is from OzTAM/Regional TAM in-home panels and includes playback up to 28 days after broadcast *through the TV set* at the time the content is actually watched (^‘when watched’ TV; for details see ‘New in the Q2 2016 Report’, page 3). This is why the TV figures above differ slightly from ‘watching TV in the home’ figures in tables 2, 4 and 4a at the end of this report, which use ‘what watched’ (Consolidated 28) data. **Watching video on a PC/laptop** is from Nielsen Online Ratings (NOR) using tagged data and metered panel data and includes all online video – broadcast and non-broadcast¹. Streaming figures are for July 2016. **Viewing on smartphones and tablets** is claimed behaviour by an annual survey of online Australians aged 16+ from Nielsen’s Australian Connected Consumers Report and includes all online video. Percentages have been rounded.

As the number of hours in a day is constant, the compound effect of greater choice and opportunity to view is Australians spend a little less time each day watching broadcast TV on in-home sets than they did a year earlier. Though the tendency to spread viewing is particularly evident with younger consumers, for all major age groups the largest proportion of viewing time on any single device is to broadcast TV viewed on in-home sets.

Australians aged 2 and older who watched any online video on a PC or laptop spent 12:48 per month doing so in Q2 2016. Across the population that equates to 7:37 per person each month. This material includes streamed video (e.g., internet-delivered catch up TV, live streaming and subscription video services) and video such as YouTube, Facebook and Vimeo.

Time spent online on any device accounted for 54:44 per active user aged 2+, per month in the quarter².

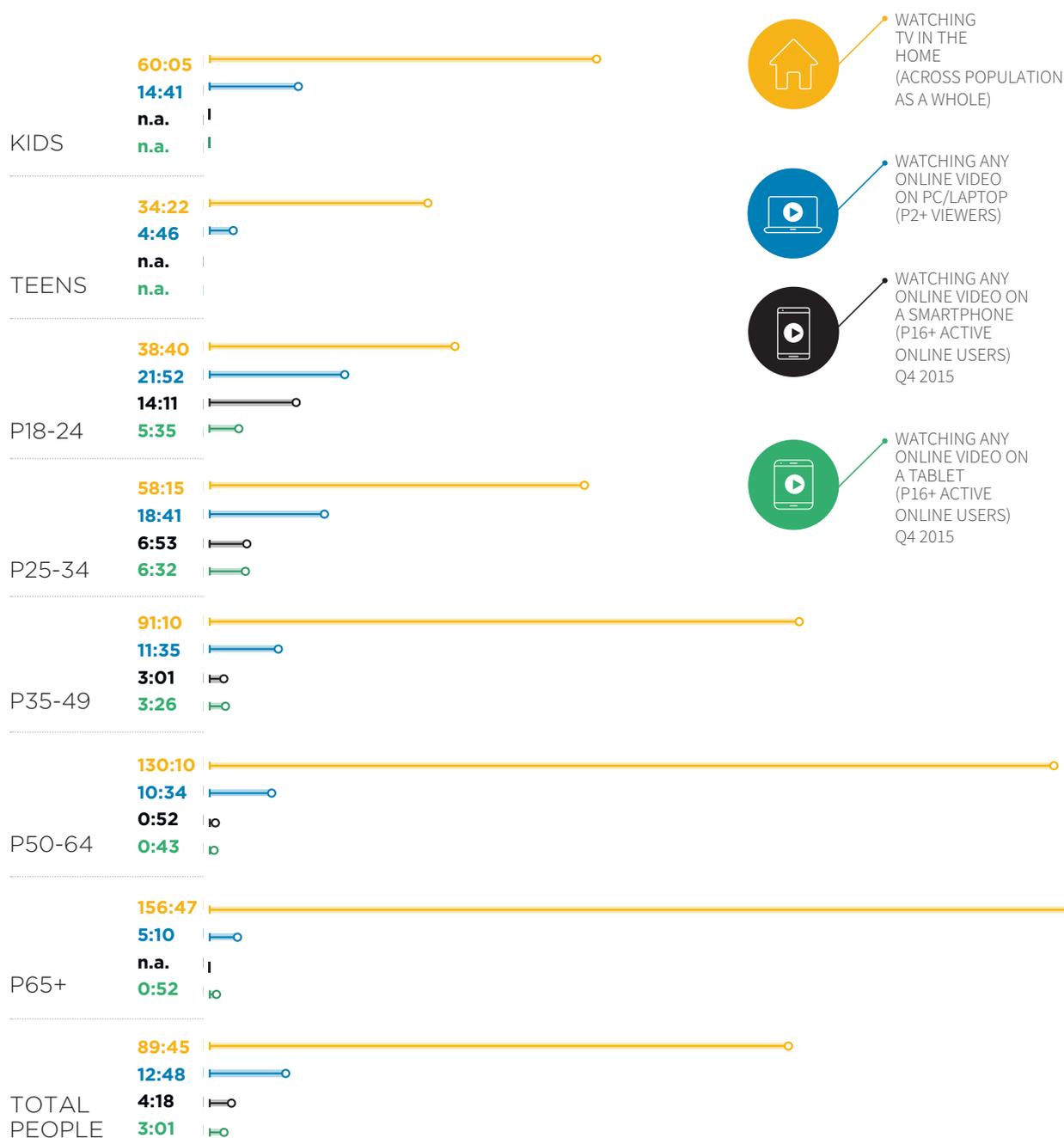
Active online Australians aged 16 and over claim to spend 4:18 on average each month watching any online video on a **smartphone** and 3:01 doing so on **tablets** (Q4 2015; 2:47 and 2:03, respectively, in Q4 2014).

¹ Note that Nielsen Online Ratings - Hybrid Streaming (NOR) Q2 2016 is based on July 2016 estimate. The market level total time and audience for NOR have been progressively understated since January 2015. This was due to the Nielsen meter not capturing all instances of tags from panellists watching YouTube videos and VEVO Parent on updated versions of browsers. This has now been corrected as of July 2016 data in Nielsen Online Ratings - Hybrid Streaming. This means the historical NOR data and figures for time spent viewing video on internet in the Q1 2015-Q1 2016 Multi-Screen Report should not be used.
At no time were there any issues or trend breaks in OzTAM or Regional TAM TV data.

² 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 (HH:MM)

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



Watching TV in the home is Consolidated 28 'what watched'* data across the Australian population, as reported in tables 2, 4 and 4a. (See 'New in the Q2 2016 Report', page 3.) This is why the TV figures in 'Month in the life' differ slightly from the infographic, 'Video viewing, average time spent per month', which uses 'when watched'^ data.



Total use of the television set

The way in which Australians use their TV sets has been changing over the past several years and continues to do so – an example of how screen activity is spreading, thereby affecting the time people spend with different devices and the activities they undertake on them, too.

The shifting composition of **total TV set use** is due to the multi-functional capabilities of modern TVs, enabled by internet-capable

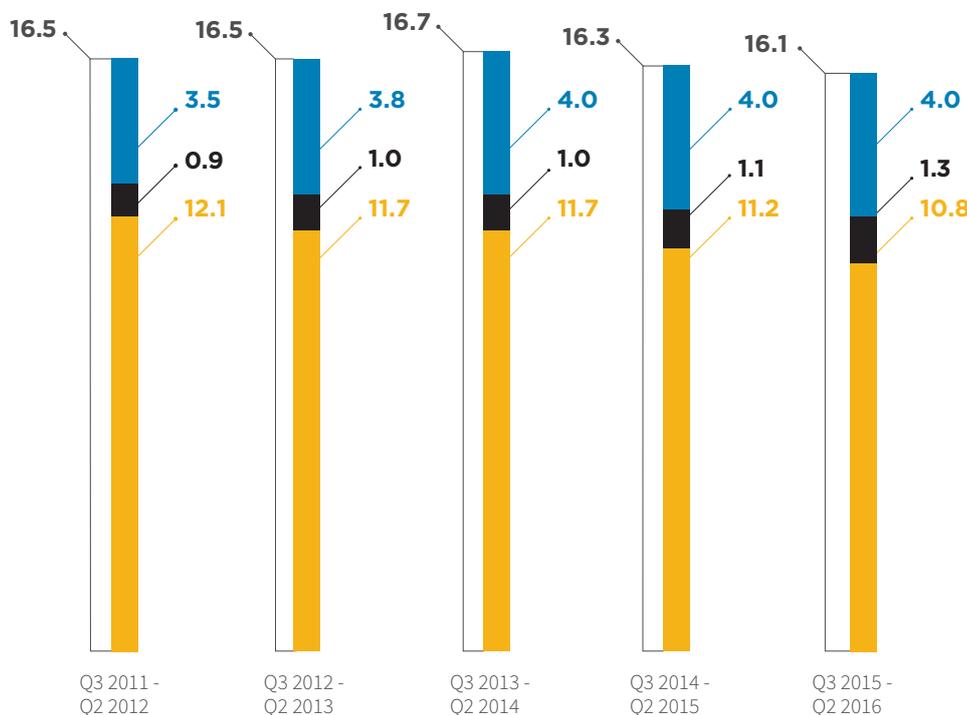
sets and/or devices attached to the TV set. **Other TV screen use** includes gaming; viewing TV network catch up services; watching DVDs; playing back recorded broadcast material beyond 28 days; internet browsing; streaming music; and accessing over-the-top internet-delivered video services.

The proportion of time Australians devote to other screen use has risen during the past five years though has stabilised over the last

three rolling four-quarter periods: from 3.5 per cent TARP in 2011/12 to 4.0 per cent now.

Live viewing through the TV set has dropped from 12.1 per cent TARP in 2011/12 to 10.8 per cent TARP currently. **Playback** viewing (within 7 days) was 0.9 per cent TARP in 2011/12 and 1.3 per cent in the latest four-quarter period (Q1 and Q2 2016 include playback up to 28 days; Q3 and Q4 2015 include 7-day playback only).

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 Q3 2015 - Q2 2016 (far right bar, left) an estimated 16.1 per cent of Australians were using their in-home TV screens.

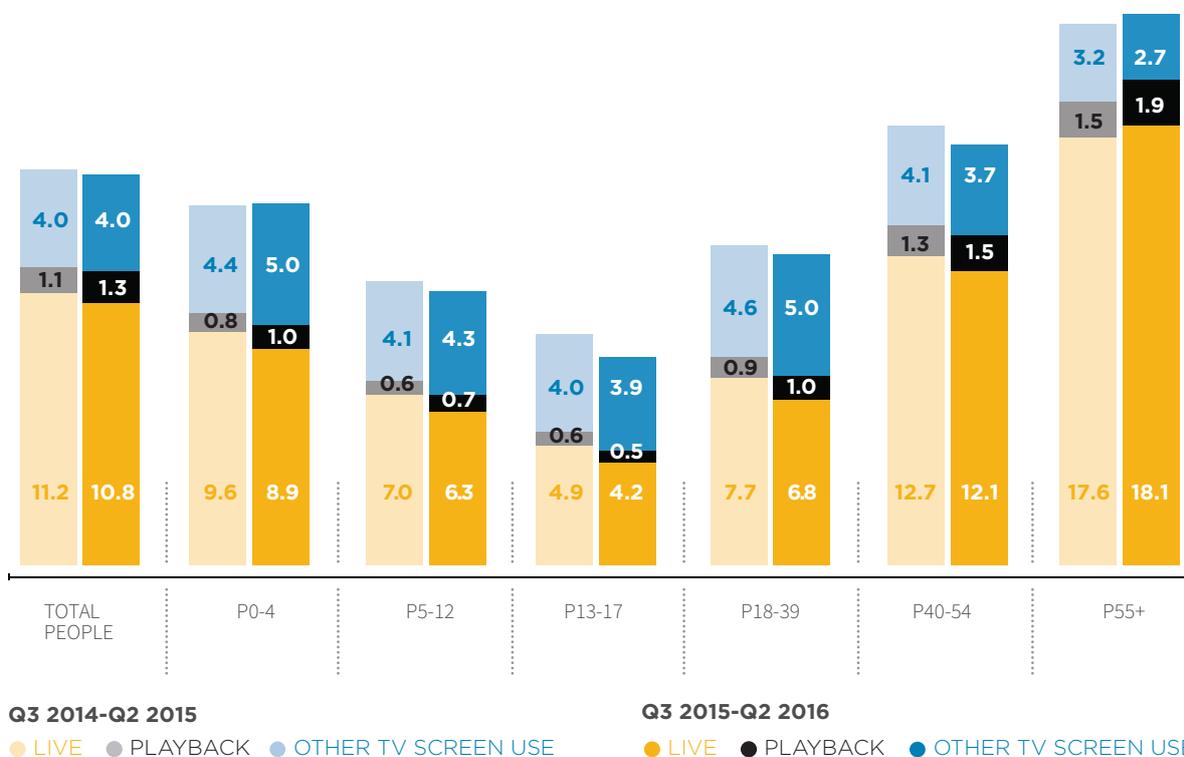
○ LIVE ○ PLAYBACK ○ OTHER TV SCREEN USE

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 seven or 28 days of original broadcast, at the time it was viewed ('when watched'). Playback up to and including Q4 2015 is to seven days, Q1 and Q2 2016 include playback 'when watched' up to 28 days.



Australians aged 55 and over watched more live and playback TV in the latest four-quarter period than they did a year earlier. While their other TV screen use fell, growth in broadcast TV viewing saw their total use of the TV set rise year-on-year. Kids aged 0-4 also increased their total TV screen use, driven by 0.6 per cent TARP growth in other TV screen use. People 5-12 and 18-39s also increased their other screen use, by 0.2 and 0.4 per cent TARP, respectively. Playback was steady or higher for all age groups except 13-17s, where it eased 0.1 per cent TARP. 13-17s devote the greatest proportion of their total TV screen time to other TV screen use: 3.9 per cent TARP in the latest period, which is however down slightly on the prior year.

TARP % BY DEMOGRAPHIC



Playback is broadcast content played back through the TV set at normal speed within either seven or 28 days of original broadcast. Playback up to and including Q4 2015 is to seven days, Q1 and Q2 2016 includes up to 28 days.



Viewing patterns across the day

The evolution in Australians' viewing habits continues to be most noticeable in prime time.

On an all-day (24-hour) basis, other TV screen use went from 28 hours and 42 minutes (28:42) per Australian each month in Q2 2015 (*including 8-28 day playback viewing*) to 29:41 per month *excluding* 8-28 day playback viewing in Q2 2016. On the same basis, other TV screen use in prime time rose by 47 minutes[^].

This shows how time spent with the TV set for purposes other than watching live or playing back TV within 28 days continues to rise.

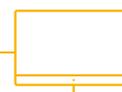
The addition of 8-28 day playback viewing *at the time the broadcast material was actually watched*

(*'when watched'*[^]) saw playback viewing across the day at 9:39 per Australian each month in the latest quarter. In prime time, such viewing was 5:18.

Together, other TV screen use and 8-28 day playback viewing now account for 14 hours per month per Australian in prime time. The growth in such activity contributes to the gradual decline seen in live and playback to 7 TV viewing over the past several years.

Year-on-year total TV screen use was down by 33 minutes on average per month across the day, and by 33 minutes in prime time, impacted by the decline in broadcast viewing.

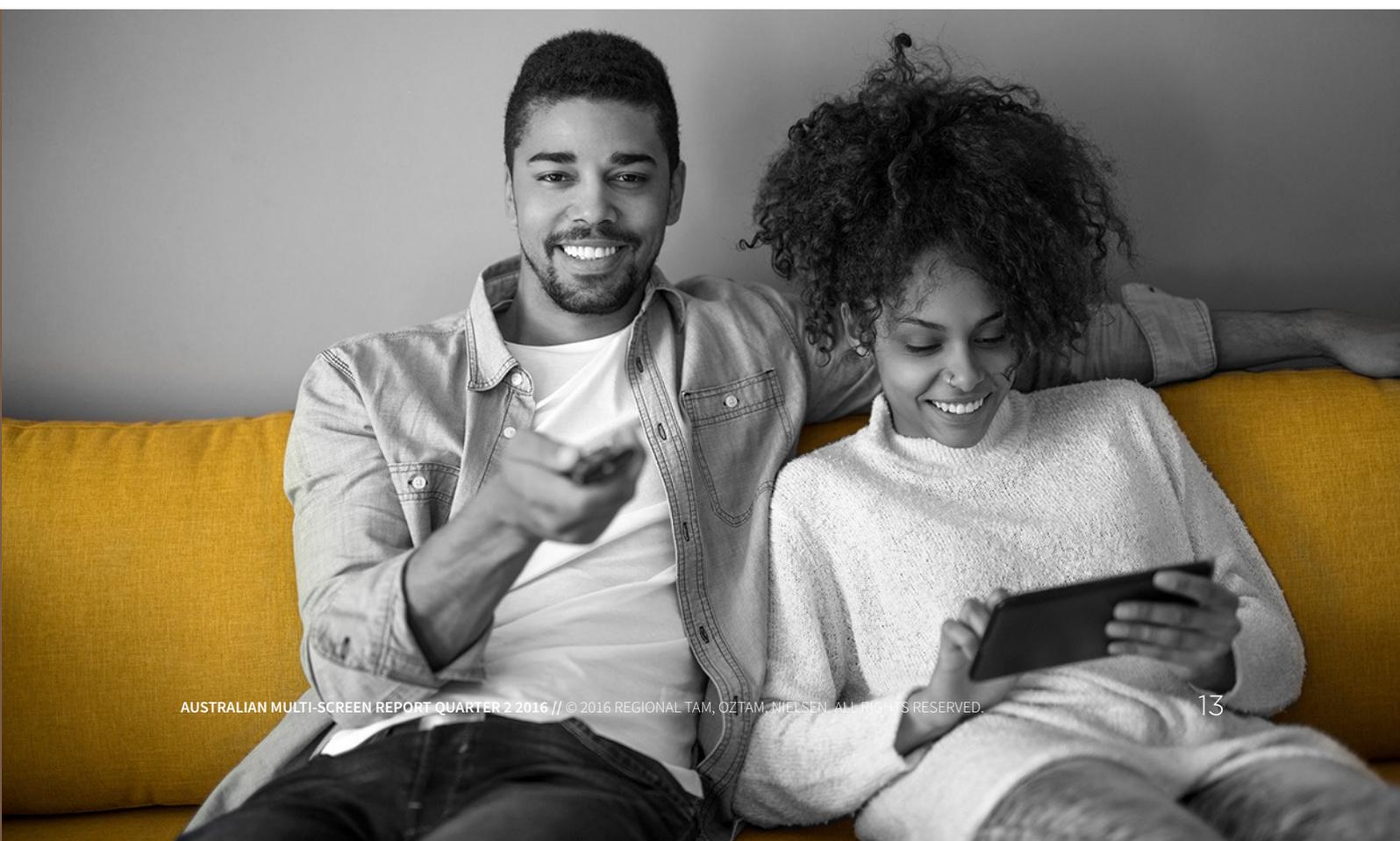




TOTAL PEOPLE				
	0200-2600		1800-2400	
	Q2 2015	Q2 2016	Q2 2015	Q2 2016
WATCHING TV IN THE HOME	90:53	89:45	49:59	48:49
Watching live TV	82:42	80:22	44:41	42:39
Watching playback to 7* TV	8:11	7:54	5:18	5:06
Watching playback 8-28* TV	n.a	1:29	n.a	1:04
	0200-2600		1800-2400	
	Q2 2015	Q2 2016	Q2 2015	Q2 2016
TOTAL TV SCREEN USE	120:15	119:42	61:42	61:09
Watching live TV	82:42	80:22	44:41	42:39
Watching playback to 7^ TV	8:51	8:03	4:36	4:30
Watching playback 8-28^ TV	n.a	1:36	n.a	0:48
Other screen use	28:42	29:41	12:25	13:12

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

Q2 2016 playback figures are to seven days and 8-28 days || Q2 2015 playback figures are to seven days.
 Q2 2016 Other TV screen use excludes 8-28 day playback || Q2 2015 Other TV screen use includes 8-28 day playback.
 For an explanation of 'when watched' vs 'what watched', please see 'New in Q2 2016' on page 3.





Broadcast content viewed on TV sets^Δ and connected devices across the day

To further explore people's TV viewing across the day, this section illustrates the times at which Australians use their TV sets and other connected devices to watch broadcast content.

It also includes Australians' use of their TV sets for other purposes: such activity was explained in the previous section, 'Total use of the TV set'.

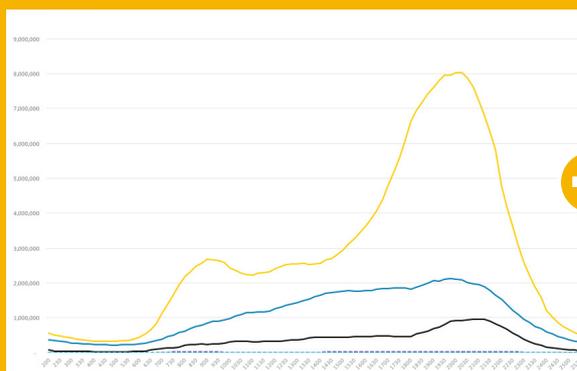
INTERPRETING 'SHAPE OF DAY' GRAPHS

The day-of-week graphs in this section compare patterns of viewing across the day (not volume), and have been rescaled to show peaks and troughs for different devices.

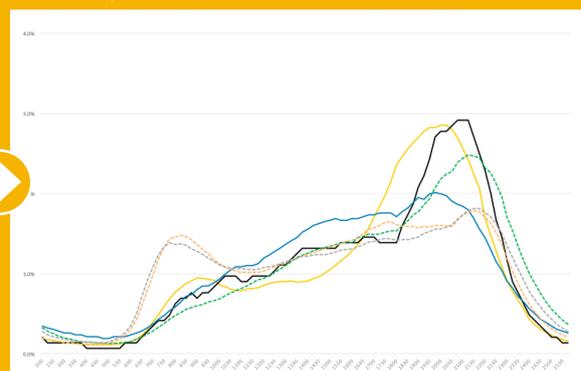
Taking Sunday for example, the graph below, left, shows viewing levels on TVs and other connected devices, as well as people's other use of their TV

sets. The corresponding graph to the right rescales each of these curves to more easily compare the highs and lows for various activities: it charts the percentage each quarter-hour represents of the total day's activity for that particular device/activity. Each day is represented by the standard television 24-hour research day (2am-2am); there are 96 quarter-hours in a 24-hour day.

SUNDAY



SUNDAY | RESCALED FOR COMPARATIVE SHAPES



● LIVE TV ● PLAYBACK TV ● OTHER TV SCREEN USE ● CATCH UP DESKTOP/LAPTOP ● CATCH UP TABLET ● CATCH UP SMARTPHONE

Sources: Live TV, playback to 28 'when watched' TV and other TV screen use: OzTAM and Regional TAM, May 1-28, 2016. Desktop/laptop, tablet and phone: OzTAM VPM May 1-28, 2016. VPM for catch-up viewing only, excludes live streaming.

^Δ Other TV use includes any activity on the TV set other than watching live or playback TV within 28 days of broadcast.



The following 'shape of day' graphs compare the peaks and troughs when people view broadcast TV material on TVs, PCs/laptops, tablets and smartphones. **Please note** the data include broadcast TV content only; other types of video content are excluded with the exception of 'other TV screen use', which among other activities captures non-broadcast video and playback beyond 28 days – as explained in 'Total use of the TV set'.

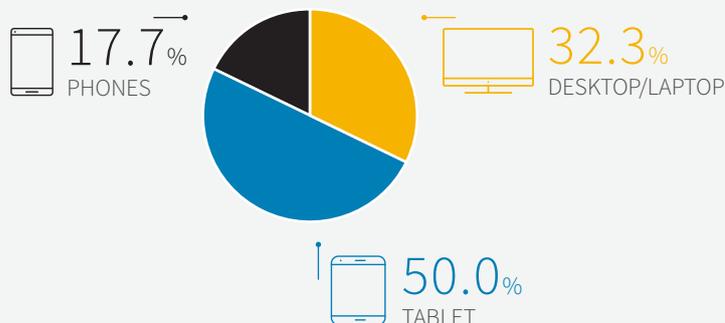
Across the days of the week and times of day, some TV viewing patterns are evident:

- In volume terms, watching live TV remains the dominant viewing activity.
- Among all devices there is an evening 'peak', reflecting the time of day at which people generally have the greatest ability to view.
- In the evenings, live viewing on TV sets begins to increase earlier and peaks earlier than playback, other TV screen use, and catch up viewing on other connected devices.
- There is also a distinctive morning peak for live TV viewing on the TV set and catch up viewing on tablets and phones.
- Live TV however has a less pronounced morning peak on weekends.
- In contrast, there is a distinctive evening peak for catch up on desktops/laptops; playback viewing on the TV set; and other TV use, following a gradual, steady build from early morning.
- On weekends this behaviour grows more quickly during the course of the day, which makes sense: on weekends people are more likely to be at home and have time to spend with non-portable screens.
- The late evening peak for viewing on portable devices indicates people may be taking their devices to bed with them before switching off for the night. The morning peak for phones and tablets also suggests these devices are being used in bed.
- On Sundays, other TV screen use is prominent during the day and the evening. It grows quickly across the morning and reaches levels close to its evening peak from about lunchtime.





Overall, the majority of VPM catch up viewing occurs on tablets, followed by desktop/laptops and then smartphones.

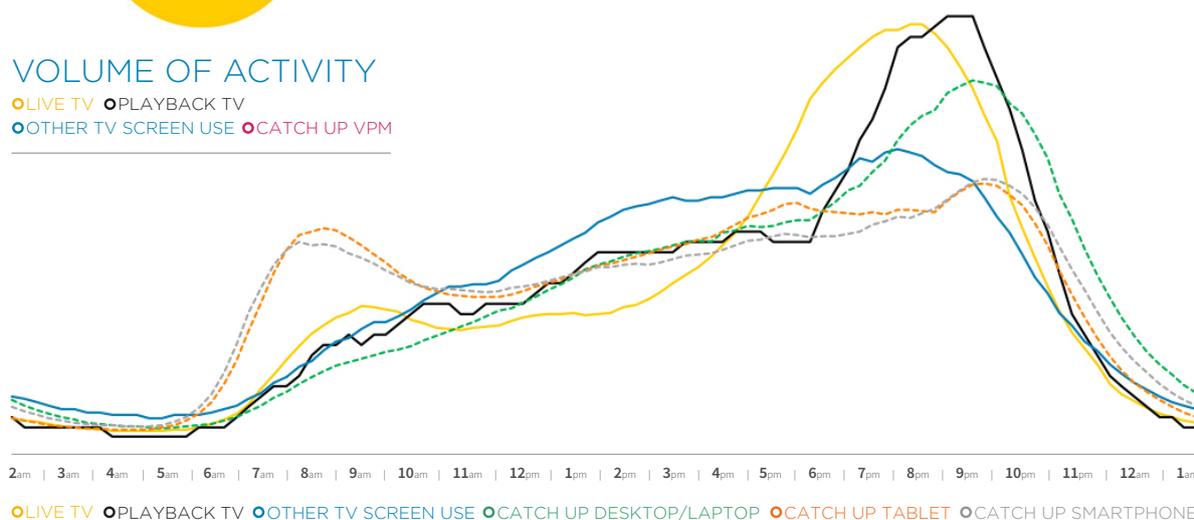


The graphs that follow illustrate activity rather than volume: please remember that live viewing accounts for the vast majority of actual time spent viewing. As discussed in the previous section however, viewing on connected devices, along with other TV screen use, has contributed to a decline in the time people spend viewing live and playback TV on TV sets – particularly in the evenings.

SUNDAY | SHAPE OF DAY (RESCALED)



VOLUME OF ACTIVITY
 ● LIVE TV ● PLAYBACK TV
 ● OTHER TV SCREEN USE ● CATCH UP VPM

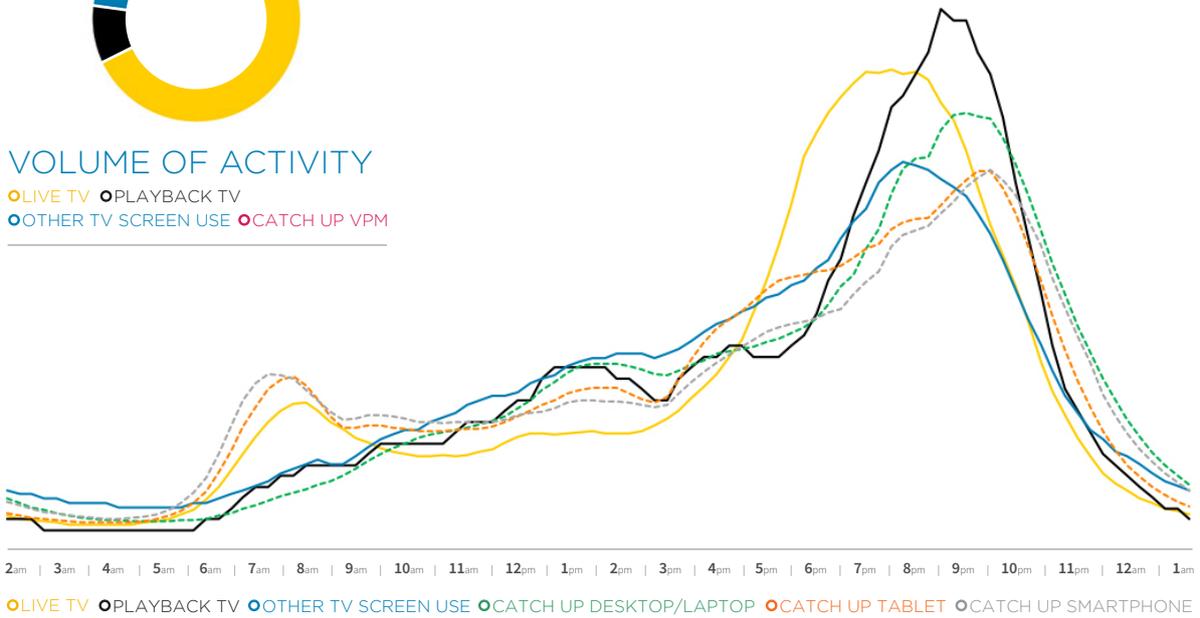




VOLUME OF ACTIVITY

● LIVE TV
 ● PLAYBACK TV
● OTHER TV SCREEN USE
 ● CATCH UP VPM

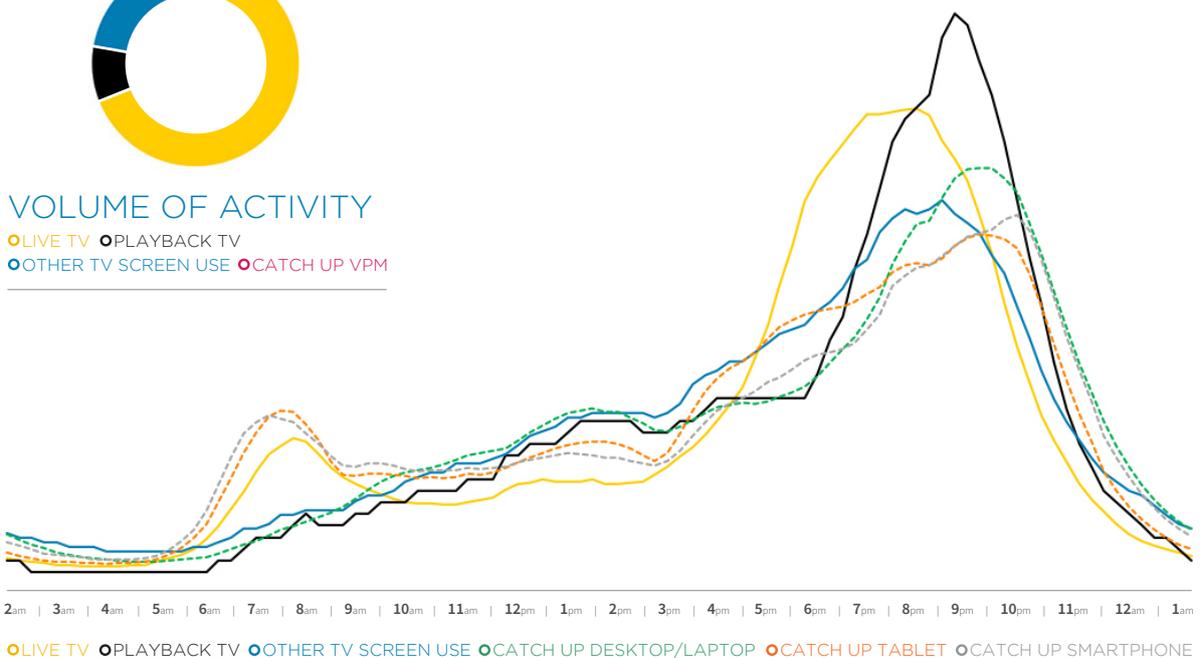
MONDAY | SHAPE OF DAY (RESCALED)



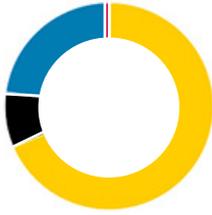
VOLUME OF ACTIVITY

● LIVE TV
 ● PLAYBACK TV
● OTHER TV SCREEN USE
 ● CATCH UP VPM

TUESDAY | SHAPE OF DAY (RESCALED)

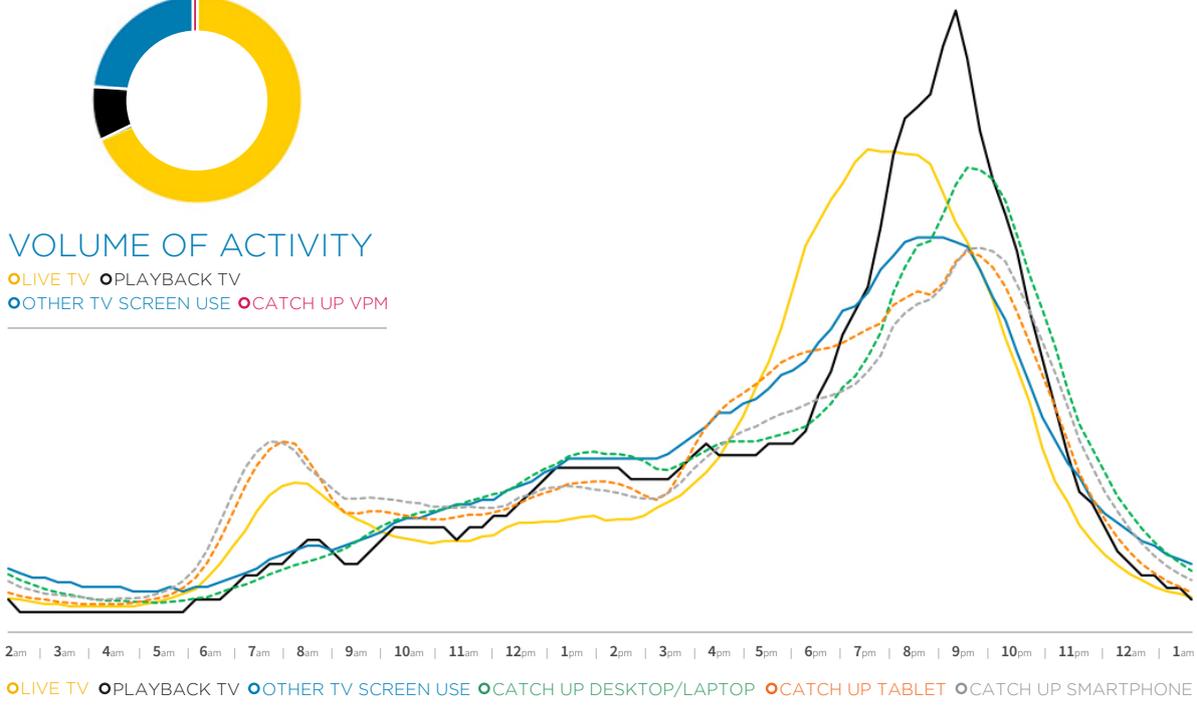


WEDNESDAY | SHAPE OF DAY (RESCALED)



VOLUME OF ACTIVITY

● LIVE TV
 ● PLAYBACK TV
 ● OTHER TV SCREEN USE
 ● CATCH UP VPM

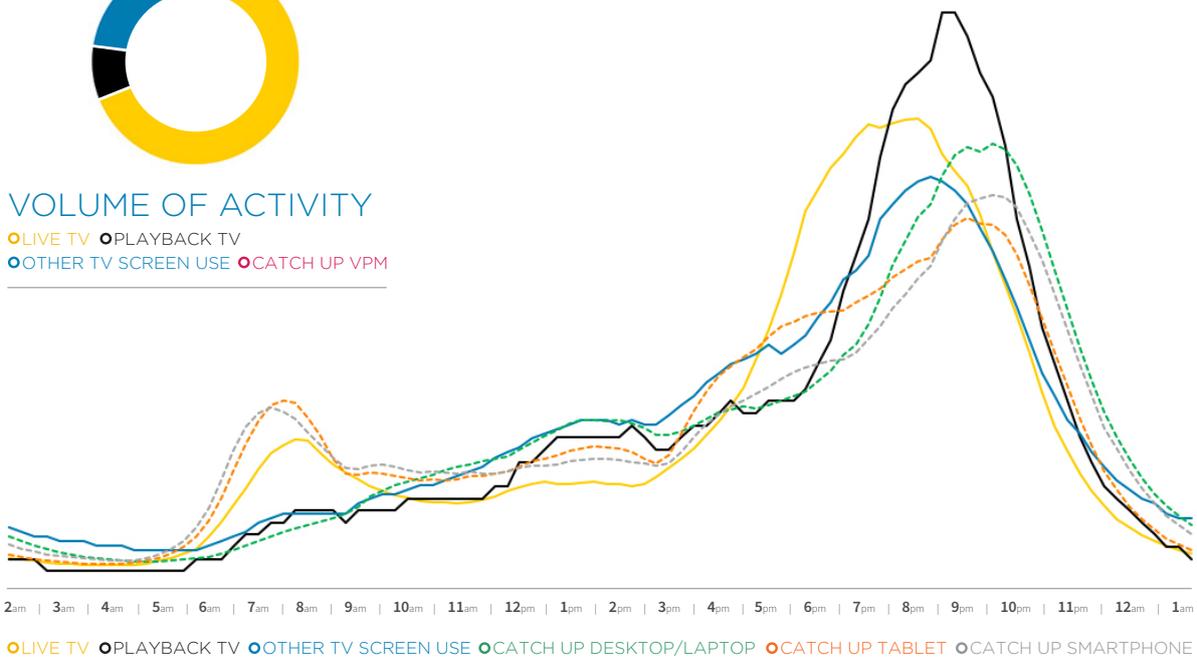


THURSDAY | SHAPE OF DAY (RESCALED)

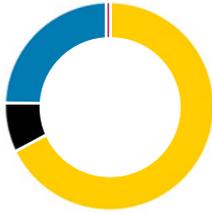


VOLUME OF ACTIVITY

● LIVE TV
 ● PLAYBACK TV
 ● OTHER TV SCREEN USE
 ● CATCH UP VPM

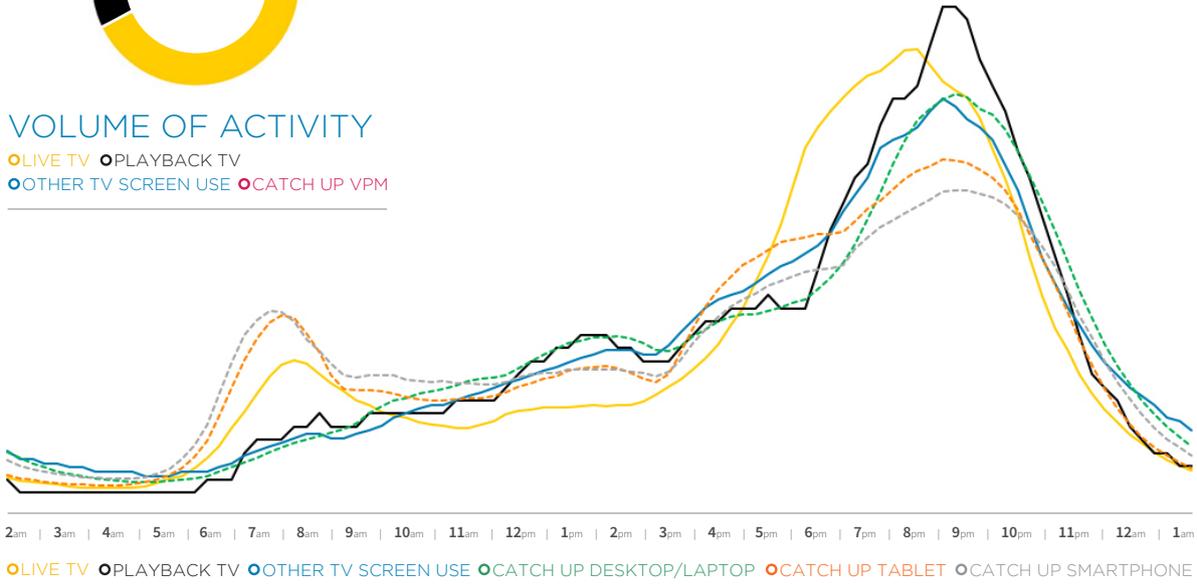


FRIDAY | SHAPE OF DAY (RESCALED)

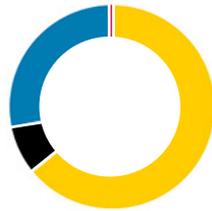


VOLUME OF ACTIVITY

● LIVE TV
 ● PLAYBACK TV
 ● OTHER TV SCREEN USE
 ● CATCH UP VPM

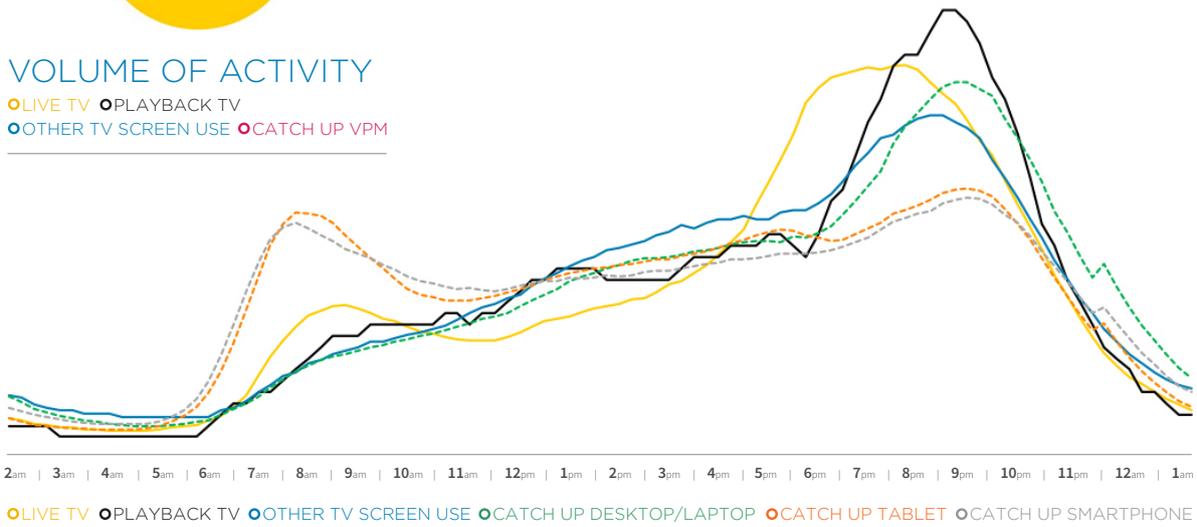


SATURDAY | SHAPE OF DAY (RESCALED)



VOLUME OF ACTIVITY

● LIVE TV
 ● PLAYBACK TV
 ● OTHER TV SCREEN USE
 ● CATCH UP VPM





KEY OBSERVATIONS

TABLE 01 TECHNOLOGY PENETRATION	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016
Completely DTT: Penetration within TV households ¹ (Homes capable of receiving DTT on each working TV within the home)	96%	97%	97%	97%	97%
HD TV: Penetration within TV households (Homes capable of receiving HD DTT on each working TV within the home)	94%	95%	95%	95%	96%
Personal video recorder (PVR): Penetration within TV households	57%	57%	58%	58%	59%
2+ PVR: Penetration within TV households	16%	16%	17%	17%	17%
Internet connection: Household penetration ²	80%	80%	80%	81%	81%
Tablets: Household penetration	47%	49%	49%	49%	49%
Internet capable TV in home (whether connected or not)	30%	31%	32%	35%	36%
Smartphones: People 14+ ³	79%	80%	80%	81%	81%

TABLE 02 MONTHLY TIME SPENT (HH:MM)	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016
Watching TV in the home ⁴ :					
Live viewing + Playback within 7 days	90:53	90:42	85:17	85:12	88:15
Live viewing + Playback within 28 days				86:36	89:45
Watching Playback TV within 7 days	8:11	7:45	7:20	7:28	7:54
Watching Playback TV within 28 days				8:51	9:23
Online time spent per active user ⁵	37:31	34:44	31:12		
				50:30	54:44
Watching video on internet per viewer ⁶					12:48
Watching online video on a smartphone per active online user ⁷ Q4 2015	n.a.	n.a.	4:18	n.a.	n.a.
Watching online video on a tablet per active online user ⁷ Q4 2015	n.a.	n.a.	3:01	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 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 based on Consolidated 7 or Consolidated 28 data, as noted. Playback is TV content played back through an in-home TV set up to 7 days (or 28 days, as noted) after the original broadcast. Consolidated 28 data were introduced in January 2016 and are not available for previous years. Therefore any comparisons between 2016 and earlier years should note the respective playback bases and highlight the differences if applicable. 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. Figures are per active user. DRM for tablet and smartphones is P18+ only.

⁶ Source: Nielsen Online Ratings (NOR) - Hybrid Streaming. Figures are national and per viewer, people 2+. NOR Q2 2016 is based on July 2016 estimate. The market level total time and audience for NOR have been progressively understated since January 2015. This was due to the Nielsen meter not capturing all instances of tags from panellists watching YouTube videos and VEVO Parent on updated versions of browsers. This has now been corrected as of July 2016 data in Nielsen Online Ratings - Hybrid Streaming. This means the historical NOR data and figures for time spent viewing video on internet in the Q1 2015-Q1 2016 Multi-Screen Report should not be used; this is also why watching video on internet per viewer figures do not appear in tables 2, 3, 4 and 4a for Q2 2015 - Q1 2016. At no time were there any issues or trend breaks in OzTAM or Regional TAM TV data.

⁷ Smartphone and tablet video viewing source: Nielsen Australian Connected Consumers Report 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 self-reported weekly time spent multiplied by average number of weeks in a month. Figure relates to online video only.



TABLE 03

OVERALL USE (000S), MONTHLY REACH	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016
Watching TV in the home ⁸ :					
Live viewing + Playback within 7 days	22,193	22,175	22,154	22,323	22,382
Live viewing + Playback within 28 days				22,373	22,432
Watching Playback TV within 7 days	12,226	12,103	12,343	12,339	12,543
Watching Playback TV within 28 days				13,013	13,238
Online unique audience ⁹	18,117	18,392	18,409		
				19,567	19,720
Watching video on internet per viewer ¹⁰					
					13,970
Owning/using a smartphone ¹¹	15,406	15,639	15,647	16,183	16,261
Watching online video on a smartphone per active online user ¹² Q4 2015	n.a.	n.a.	4,065	n.a.	n.a.
Watching online video on a tablet per active online user ¹² Q4 2015	n.a.	n.a.	2,710	n.a.	n.a.

⁸ 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 based on Consolidated 7 or Consolidated 28 data, as noted. Playback is TV content played back through an in-home TV set up to 7 days (or 28 days, as noted) after the original broadcast. Consolidated 28 data were introduced in January 2016 and are not available for previous years. Therefore any comparisons between 2016 and earlier years should note the respective playback bases and highlight the differences if applicable. Includes free-to-air and subscription television viewing.

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. DRM for tablet and smartphones is P18+ only.

¹⁰ Source: Nielsen Online Ratings (NOR) - Hybrid Streaming. Figures are national and per viewer, people 2+. NOR Q2 2016 is based on July 2016 estimate. The market level total time and audience for NOR have been progressively understated since January 2015. This was due to the Nielsen meter not capturing all instances of tags from panellists watching YouTube videos and VEVO Parent on updated versions of browsers. This has now been corrected as of July 2016 data in Nielsen Online Ratings - Hybrid Streaming. This means the historical NOR data and figures for time spent viewing video on internet in the Q1 2015-Q1 2016 Multi-Screen Report should not be used; this is also why watching video on internet per viewer figures do not appear in tables 2, 3, 4 and 4a for Q2 2015 - Q1 2016. At no time were there any issues or trend breaks in OzTAM or Regional TAM TV data.

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).





TABLE 04

A MONTH IN THE LIFE - Q2 2016	KIDS¹³	TEENS¹⁴	P18-24	P25-34	P35-49	P50-64	P65+	TOTAL PEOPLE
Watching TV in the home ⁸ (Consolidated to 28 days in Q2 2016)	60:05	34:22	38:40	58:15	91:10	130:10	156:47	89:45
Q2 2015 (Consolidated to 7 days)	64:25	38:31	41:34	65:52	92:54	126:13	152:36	90:53
Watching Playback TV (within 28 days)	5:53	3:46	5:00	7:07	10:57	12:34	14:33	9:23
Q2 2015 (within 7 days)	4:58	3:51	4:52	6:43	9:42	10:49	11:53	8:11
Online time spent per active user ⁹	3:21	4:53	60:27	70:45	71:56	70:49	31:32	54:44
Watching video on internet per viewer ¹⁰	14:41	4:46	21:52	18:41	11:35	10:34	5:10	12:48
Watching online video on a smartphone per active online user ¹² Q4 2015	n.a.	n.a.	14:11	6:53	3:01	0:52	n.a.	4:18
Watching online video on a tablet per active online user ¹² Q4 2015	n.a.	n.a.	5:35	6:32	3:26	0:43	0:52	3:01

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.





TABLE 4A A MONTH IN THE LIFE - BY QUARTER

KIDS¹³	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016
Watching TV in the home ⁸ :					
Live viewing + Playback within 7 days	64:25	64:58	59:23	55:36	58:42
Live viewing + Playback within 28 days				56:55	60:05
Watching Playback TV within 7 days	4:58	4:56	4:35	4:21	4:29
Watching Playback TV within 28 days				5:40	5:53
Online time spent per active user ⁹	5:42	5:12	4:47		
				3:41	3:21
Watching video on internet per viewer ¹⁰					14:41

TEENS¹⁴	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016
Watching TV in the home ⁸ :					
Live viewing + Playback within 7 days	38:31	38:22	33:46	31:17	33:43
Live viewing + Playback within 28 days				31:50	34:22
Watching Playback TV within 7 days	3:51	3:23	3:03	2:49	3:07
Watching Playback TV within 28 days				3:22	3:46
Online time spent per active user ⁹	7:57	8:29	8:45		
				5:53	4:53
Watching video on internet per viewer ¹⁰					4:46

P18 - 24	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016
Watching TV in the home ⁸ :					
Live viewing + Playback within 7 days	41:34	39:24	36:06	37:22	37:47
Live viewing + Playback within 28 days				38:02	38:40
Watching Playback TV within 7 days	4:52	4:14	3:44	3:41	4:07
Watching Playback TV within 28 days				4:21	5:00
Online time spent per active user ⁹	35:08	29:55	25:41		
				52:10	60:27
Watching video on internet per viewer ¹⁰					21:52
Watching online video on a smartphone per active online user ¹² Q4 2015	n.a.	n.a.	14:11	n.a.	n.a.
Watching online video on a tablet per active online user ¹² Q4 2015	n.a.	n.a.	5:35	n.a.	n.a.



TABLE 4A A MONTH IN THE LIFE - BY QUARTER

P25 - 34	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016
Watching TV in the home ⁸ :					
Live viewing + Playback within 7 days	65:52	61:31	56:44	56:19	57:01
Live viewing + Playback within 28 days				57:27	58:15
Watching Playback TV within 7 days	6:43	5:56	5:36	5:40	5:53
Watching Playback TV within 28 days				6:48	7:07
Online time spent per active user ⁹	39:30	37:24	35:16		
				71:09	70:45
Watching video on internet per viewer ¹⁰					18:41
Watching online video on a smartphone per active online user ¹² Q4 2015	n.a.	n.a.	6:53	n.a.	n.a.
Watching online video on a tablet per active online user ¹² Q4 2015	n.a.	n.a.	6:32	n.a.	n.a.

P35 - 49	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016
Watching TV in the home ⁸ :					
Live viewing + Playback within 7 days	92:54	93:12	86:15	84:12	89:27
Live viewing + Playback within 28 days				85:43	91:10
Watching Playback TV within 7 days	9:42	9:01	8:46	8:37	9:13
Watching Playback TV within 28 days				10:08	10:57
Online time spent per active user ⁹	41:37	39:40	34:27		
				65:46	71:56
Watching video on internet per viewer ¹⁰					11:35
Watching online video on a smartphone per active online user ¹² Q4 2015	n.a.	n.a.	3:01	n.a.	n.a.
Watching online video on a tablet per active online user ¹² Q4 2015	n.a.	n.a.	3:26	n.a.	n.a.

P50 - 64	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016
Watching TV in the home ⁸ :					
Live viewing + Playback within 7 days	126:13	126:51	120:48	122:38	128:21
Live viewing + Playback within 28 days				124:20	130:10
Watching Playback TV within 7 days	10:49	10:33	9:44	10:22	10:46
Watching Playback TV within 28 days				12:03	12:34
Online time spent per active user ⁹	46:59	42:29	38:01		
				63:39	70:49
Watching video on internet per viewer ¹⁰					10:34
Watching online video on a smartphone per active online user ¹² Q4 2015	n.a.	n.a.	0:52	n.a.	n.a.
Watching online video on a tablet per active online user ¹² Q4 2015	n.a.	n.a.	0:43	n.a.	n.a.



TABLE 4A A MONTH IN THE LIFE - BY QUARTER

P65+	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016
Watching TV in the home ⁸ :					
Live viewing + Playback within 7 days	152:36	155:33	150:51	153:48	154:53
Live viewing + Playback within 28 days				155:49	156:47
Watching Playback TV within 7 days	11:53	11:36	11:18	11:50	12:40
Watching Playback TV within 28 days				13:50	14:33
Online time spent per active user ⁹	28:43	28:35	27:46		
				29:34	31:32
Watching video on internet per viewer ¹⁰					5:10
Watching online video on a smartphone per active online user ¹² Q4 2015	n.a.	n.a.	n.a.	n.a.	n.a.
Watching online video on a tablet per active online user ¹² Q4 2015	n.a.	n.a.	0:52	n.a.	n.a.

TOTAL PEOPLE	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016
Watching TV in the home ⁸ :					
Live viewing + Playback within 7 days	90:53	90:42	85:17	85:12	88:15
Live viewing + Playback within 28 days				86:36	89:45
Watching Playback TV within 7 days	8:11	7:45	7:20	7:28	7:54
Watching Playback TV within 28 days				8:51	9:23
Online time spent per active user ⁹	37:31	34:44	31:12		
				50:30	54:44
Watching video on internet per viewer ¹⁰					12:48
Watching online video on a smartphone per active online user ¹² Q4 2015	n.a.	n.a.	4:18	n.a.	n.a.
Watching online video on a tablet per active online user ¹² Q4 2015	n.a.	n.a.	3:01	n.a.	n.a.



TABLE 05 VIDEO AUDIENCE COMPOSITION (BY AGE AND GENDER)

Q2 2016	KIDS	TEENS	P18-24	P25-34	P35-49	P50-64	P65+	FEMALES	MALES
On in-home TV ⁸ (Consolidated to 28 days in Q2 2016)	11%	2%	4%	10%	20%	26%	26%	53%	47%
Q2 2015 (Consolidated to 7 days)	12%	3%	4%	11%	21%	25%	25%	53%	47%
On internet ¹⁰	4%	2%	10%	19%	28%	24%	13%	46%	54%

APPENDIX

In the spirit of continual improvement and efforts to incorporate the best available data and insights from OzTAM, Regional TAM and Nielsen, the Q2 2016 issue of the Australian Multi-Screen Report contains a number of enhancements.

These are summarised as follows. The second table provides guidance on making comparisons with earlier quarters, referencing respective elements of the report.

ENHANCEMENTS AND AMENDMENTS

Element	Time period	Specifics	Rationale	Appears in
Consolidated 28 viewing data	Q1 & Q2 2016	Broadcast TV material watched live or played back through the TV set within 28 days.	Illustrates growth in 'longer-tail' viewing through TV sets.	<ul style="list-style-type: none"> Broadcast TV viewing on in-home TV sets (p. 6) Video viewing, average time spent per month (p. 7) A month in the life (p. 9) Total use of the TV set (p. 10-11) Tables 2, 4, 4a, 5
'When watched' viewing data	Q1 2015	Reports playback within 28 days viewing through TV sets at the time it actually occurs.	Provides another perspective on time-shifting behaviour, and complements 'what watched' (Consolidated 28) data, in which playback is attributed back to the time of the original broadcast.	<ul style="list-style-type: none"> Video viewing, average time spent per month (p. 7) Total use of the TV set (p. 10-11) Shape of day graphs (p. 14-19)
'Per person' online data and 'per viewer' TV data	Q2 2016	Makes time spent online and time spent viewing video online directly comparable with TV data by putting the entire online and TV universes side by side.	<p>Online numbers are restated to per person as well as per active user, and appear alongside one another.</p> <p>Average time spent viewing TV in the Multi-Screen Report has always been per head of the Australian population. For Q2 2016 recalculated time spent viewing TV figures for OzTAM and Regional TAM markets only (their respective universes) also appear alongside the entire population per head estimates.</p> <p>Nielsen's PC/laptop online video viewing data have always been per viewer; Australian Connected Consumers Report claimed figures have always been per active online user.</p> <p>Note the active online universe remains Digital Ratings (Monthly) currency, and the tables at the end of the Multi-Screen Report are per active user, as noted.</p>	<ul style="list-style-type: none"> Video viewing, average time spent per month (p. 7)

Element	Time period	Specifics	Rationale	Appears in
Nielsen Online Ratings (NOR) - Hybrid Streaming data: correction	Q1 2015 - Q2 2016	Corrects progressive understatement of market level total time and audience for NOR since January 2015.	<p>The market level total time and audience for Nielsen Online Ratings - Hybrid Streaming has been progressively understated since January 2015. This was due to the Nielsen meter not capturing all instances of tags from panellists watching YouTube videos and VEVO Parent on updated versions of browsers. This has now been corrected as of July 2016 data in Nielsen Online Ratings - Hybrid Streaming.</p> <p>This means the historical NOR data and figures for time spent viewing video on internet in the Q1 2015 – Q1 2016 Multi-Screen Report should not be used.</p> <p>At no time were there any issues or trend breaks in OzTAM or Regional TAM TV data.</p>	<ul style="list-style-type: none"> • Video viewing, average time spent per month (p. 7) • A month in the life (p. 9) • Tables 2, 4, 4a
'Shape of day' analysis	Q2 2016	Explores people's TV viewing across the day on TV sets and connected devices, as well as other use of the TV set.	<p>Compares highs and lows across the day and each day of the week for live and playback TV; other TV screen use; and catch-up TV viewing on desktop/laptops, tablets and smartphones.</p> <p>Please note the graphs compare patterns of viewing across the day, not volume.</p>	<ul style="list-style-type: none"> • Pages 14-19

GUIDELINES FOR COMPARING Q2 2016 DATA WITH EARLIER PERIODS

Element	Time period	OK to compare Q2 2016 with earlier periods?	Reason why/not and (if applicable) an example	Appears in
Consolidated 28 viewing data	Q1 & Q2 2016	Yes, so long as the respective playback bases are made clear and applicable differences are highlighted.	Consolidated 28 data were not available in the OzTAM and Regional TAM databases before Q1 2016. Example: "Q2 2016 includes playback to 28; Q2 2015 includes playback to 7 only."	<ul style="list-style-type: none"> Broadcast TV viewing on in-home TV sets (p. 6) Video viewing, average time spent per month (p. 7) A month in the life (p. 9) Total use of the TV set (p. 10-11) Tables 2, 4, 4a, 5
'When watched' viewing data	Since Q1 2015, appear in total TV screen use only. Q2 2016 also in average time spent viewing per month.	Yes, provided 'when watched' is compared to 'when watched', and 'what watched' to 'what watched'.	'When watched' and 'what watched' data yield slightly different time spent viewing figures because the playback bases are different. To understand why: Program X airs on Sunday 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 (OzTAM and Regional TAM Consolidated 7 and Consolidated 28 viewing).	<ul style="list-style-type: none"> Video viewing, average time spent per month (p. 7) Total use of the TV set (p. 10-11) Shape of day graphs (p. 14-19)
'Per person' online data and 'per viewer' TV data	Q2 2016	No.	Online numbers in previous quarters were per active user, rather than the population as a whole, and have been restated in Q2 2016 to per person. Average time spent viewing TV in the Multi-Screen Report has always been per head of the Australian population. For Q2 2016 recalculated time spent viewing TV figures for OzTAM and Regional TAM markets only (their respective universes) also appear alongside the entire population per head estimates.	<ul style="list-style-type: none"> Video viewing, average time spent per month (p. 7)
Nielsen Online Ratings (NOR) - Hybrid Streaming data: correction	Q1 2015 - Q2 2016	No.	The market level total time and audience for Nielsen Online Ratings - Hybrid Streaming has been progressively understated since January 2015. This was due to the Nielsen meter not capturing all instances of tags from panellists watching YouTube videos and VEVO Parent on updated versions of browsers. This has now been corrected as of July 2016 data in Nielsen Online Ratings - Hybrid Streaming. This means the historical NOR data and figures for time spent viewing video on internet in the Q1 2015 – Q1 2016 Multi-Screen Report should not be used. At no time were there any issues or trend breaks in OzTAM or Regional TAM TV data.	<ul style="list-style-type: none"> Video viewing, average time spent per month (p. 7) A month in the life (p. 9) Tables 2, 4, 4a

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 broadcast television content played back at normal speed through the TV set within either seven or 28 days of the original broadcast, as noted.
- 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 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). The 'Video viewing, average time spent per month' by devices graphic (on page 7) uses 'when watched' data.
- Average time spent viewing (ATV) TV 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 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 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

Explanatory Notes

of 'online time spent'. Online time spent is inclusive of all online activities including PC applications (e.g. iTunes, Skype, etc).

- March 2014 constituted a trend break for all key audience metrics from Nielsen Online Ratings - Hybrid. Nielsen, guided by its collaboration with IAB Australia's Measurement Council, transitioned to a new data processing platform and implemented a tightening of panel rules for online audience measurement. These new rules resulted in the removal of 'inactive' panelists and this has reset and stabilised the online universe metric.
- The market level total time and audience for Nielsen Online Ratings (NOR) - Hybrid Streaming have been progressively understated since January 2015. This was

due to the Nielsen meter not capturing all instances of tags from panellists watching YouTube videos and VEVO Parent on updated versions of browsers. This has now been corrected as of July 2016 data in Nielsen Online Ratings - Hybrid Streaming. This means the historical NOR data and figures for time spent viewing video on internet in the Q1 2015 - Q2 2016 Multi-Screen Report should not be used.

At no time were there any issues or trend breaks in OzTAM or Regional TAM TV data.





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