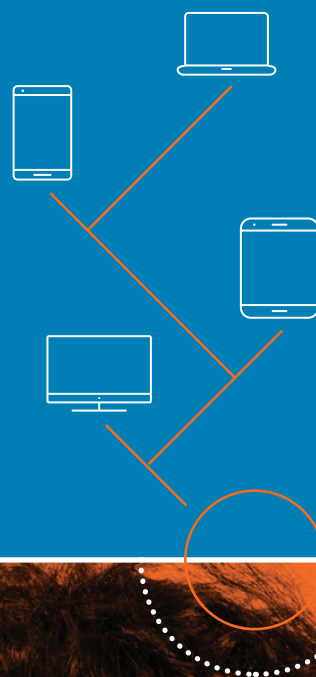


# AUSTRALIAN MULTI-SCREEN REPORT

QUARTER 03 2015



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TELEVISION AUDIENCE  
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# Australian viewing trends across multiple screens

**T**he Q3 2015 Australian Multi-Screen Report continues its examination of how viewing behaviour is changing with the take up of in-home technologies and new options to view television and other video content.

Australians remain heavy television consumers, and more choice in both platforms and

devices is leading audiences to reapportion their viewing across screens – an ongoing trend identified in earlier editions of the report.

Looking at these evolving viewing patterns in context:

## Most Australians watch broadcast television each week

**A**cross the population, in any single week of Q3 2015, 87.7 per cent of Australians viewed broadcast television (free-to-air and subscription channels) on in-home television sets. This compares to average weekly reach of 88.7 per cent during the same quarter a year earlier.

Broadcast television reach remains high among all major age groups. For example, 72.2 per cent of people aged 18-24 – a relatively light television-viewing segment – watched broadcast TV on in-home sets each week in the latest quarter.

	Q3 2014	Q3 2015
ALL PEOPLE	88.7%	87.7%
KIDS	90.2%	88.8%
TEENS	82.8%	78.9%
P18-24	73.5%	72.2%
P25-34	84.5%	82.8%
P35-49	92.1%	91.5%
P50-64	93.6%	93.5%
P65+	93.6%	93.0%

Average one-minute weekly cumulative reach. OzTAM and Regional TAM.



## Most screen time spent viewing video content is on in-home television sets and Australians are using their sets for many purposes

**C**onsistent with levels seen in earlier quarters, on average 16.3 per cent of Australians were using their TV set for any purpose at any one minute of the day in Q3 2015.

During the past five years the proportion of time Australians spend watching linear broadcast TV has declined. The majority of television is still watched live-to-air however, with 91.5 per cent of all television viewed on in-home television sets in Q3 2015 watched at the time of original broadcast.

Other TV screen use – when people use their television sets for purposes other than watching live

or playback broadcast television – has gradually risen over the past five years with take-up of technologies including internet-capable TVs; devices attached to the television such as PVRs/ DVRs and games consoles; and over-the-top streaming video and other content services.

In the rolling four quarters through Q3 2015 such other screen use eased slightly however, down by 0.1 per cent TARP to 3.8 per cent TARP now.

## Australians are using connected devices to watch TV and other video content

**A**cross the population 12.2 per cent of all video viewing takes place on screens other than the in-home TV set.

This includes broadcast content – e.g. television network catch-up and streaming sites and apps – as well as non-broadcast video such as YouTube, Vimeo and Facebook.



# Technology in Australian homes

**T**ablets are now in nearly half of all homes: 49 per cent have at least one, up from 47 per cent in Q2 2015 and 45 per cent a year ago.

80 per cent of Australians aged 14+ own a **smartphone**, four percentage points higher than in Q3 2014.

31 per cent of homes have an **internet-capable television set** ('smart' or hybrid TVs, whether connected or not). This compares to 30 per cent in the previous quarter and 29 per cent a year ago.

**PVR** penetration is unchanged quarter-on-quarter at 57 per cent (55 per cent a year ago). 16 per cent of homes now have more than one PVR.

All Australian television homes receive **digital terrestrial television** (DTT) channels on at least one household TV set, with 97 per cent able to do so on every working TV set (95 per cent a year ago).

In 95 per cent of homes every household TV set is capable of receiving **high definition** (HD) television broadcasts.

80 per cent of homes have an **internet connection**, unchanged for the past 11 quarters.





## TECHNOLOGY PENETRATION

Q3 2012 Q3 2013 Q3 2014 Q3 2015

79% 89% 95% 97%



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

73% 85% 92% 95%



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

50% 53% 55% 57%



PERSONAL VIDEO RECORDER (PVR): PENETRATION WITHIN TV HOUSEHOLDS

- 14% 15% 16%



2+ PVR: PENETRATION WITHIN TV HOUSEHOLDS

78% 80% 80% 80%



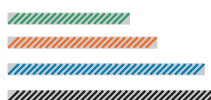
INTERNET CONNECTION: HOUSEHOLD PENETRATION

22% 37% 45% 49%



TABLETS: HOUSEHOLD PENETRATION

18% 22% 29% 31%



INTERNET CAPABLE TV IN HOME

59% 68% 76% 80%



SMARTPHONE: PEOPLE 14+ MOBILE PHONE SUBSCRIBERS





# Time spent viewing across devices

**T**rends evident in earlier editions of the Multi-Screen Report have continued in Q3 2015: the range of devices and platforms on which Australians can access broadcast and other video content gives people greater flexibility to view and therefore affects the time they spend using these devices.

Across the population, Australians spent 90 hours and 42 minutes (90:42) each month in Q3 2015 watching **broadcast television** (free-to-air and subscription channels) on in-home TV sets. This compares to 96:58 in the same quarter a year earlier.

82:57 (or 91.5 per cent) was viewed **live** to air. Broadcast TV played back through the TV set within seven days of original broadcast ('**playback**') was 7:45 (8:08 in Q3 2014).

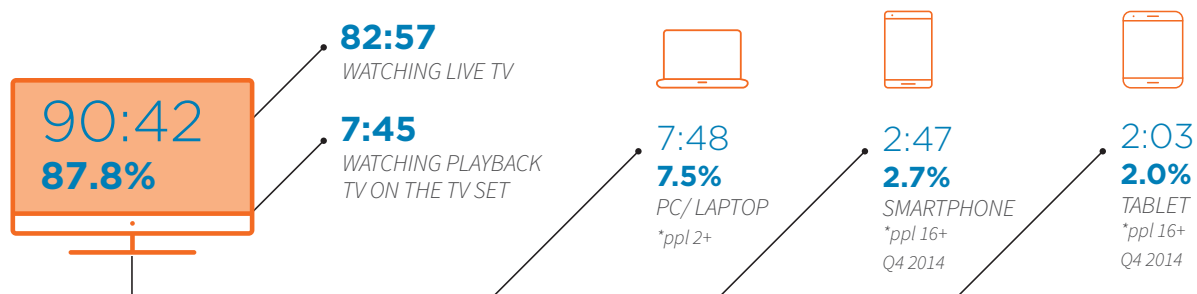
Across all screens and including all video consumption (broadcast and non-broadcast content alike) 87.8 per cent of all viewing takes place on in-home TV sets.





## VIDEO VIEWING, AVERAGE TIME SPENT PER MONTH

TV // PC // SMARTPHONE // TABLET



Younger Australians in particular increasingly use connected devices to watch any video content. However people in all age groups spend the majority of their viewing time watching broadcast TV on in-home sets.

Australians aged 2+ devoted 7 hours and 48 minutes (7:48) per month in Q3 2015 to watching any online video on a **PC or laptop**, up from 7:30 a year ago. This material includes streamed video (such as internet-delivered catch-up TV and live streaming services) and other content such as YouTube, Vimeo and Facebook.

Each month in the quarter Australians aged 2 and above spent an average 34:44 online on their home and work computers,

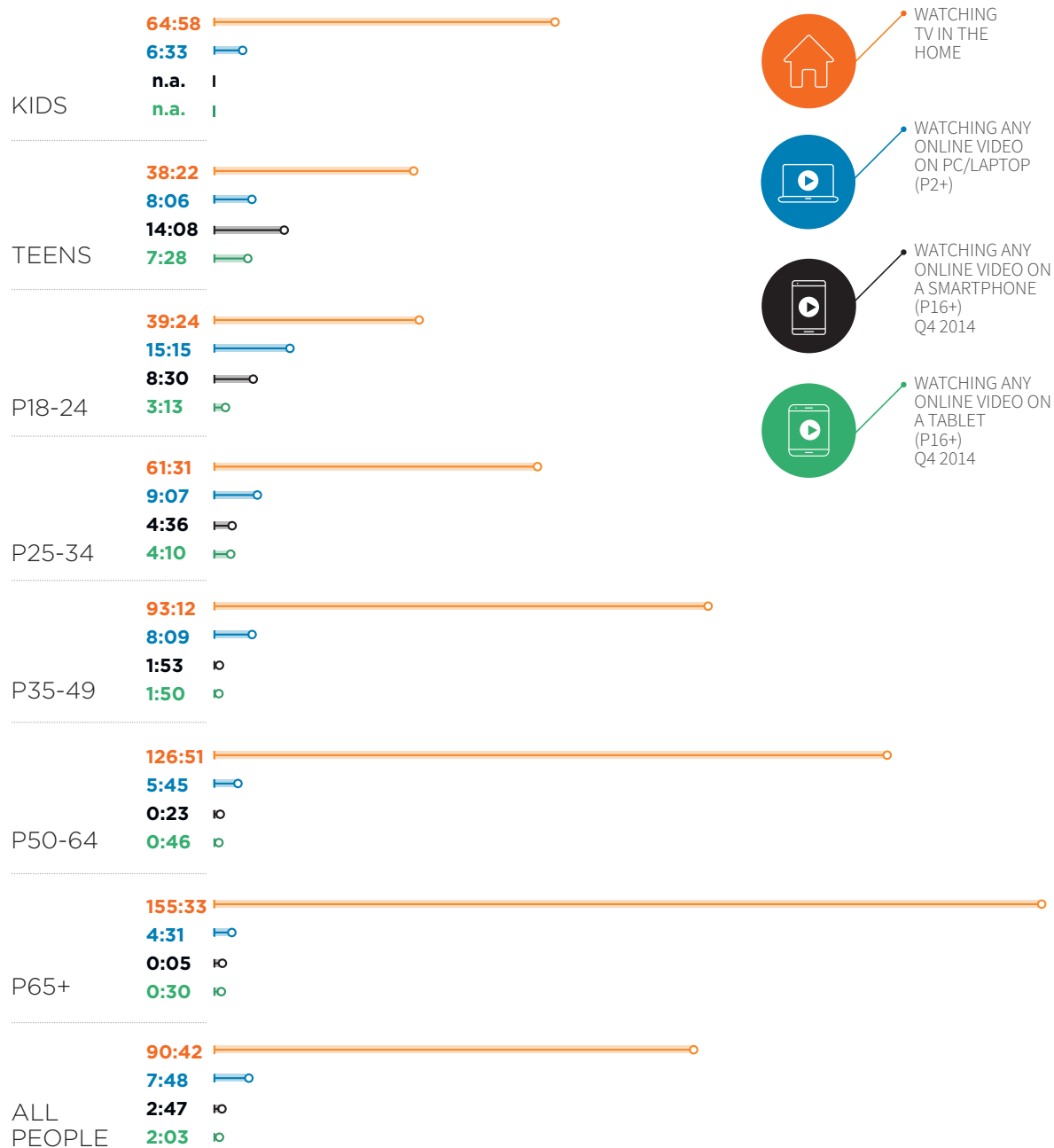
down from 37:44 in Q3 2014. This is in part driven by the migration of Australians to smartphones and tablets as places to watch video content.

Among online Australians aged 16 and over people claim to spend on average 2:47 each month watching any online video on a **smartphone** (Q4 2014).

Online Australians aged 16+ say they spend 2:03 each month watching any online video on a **tablet** (Q4 2014).

# MONTH IN THE LIFE

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





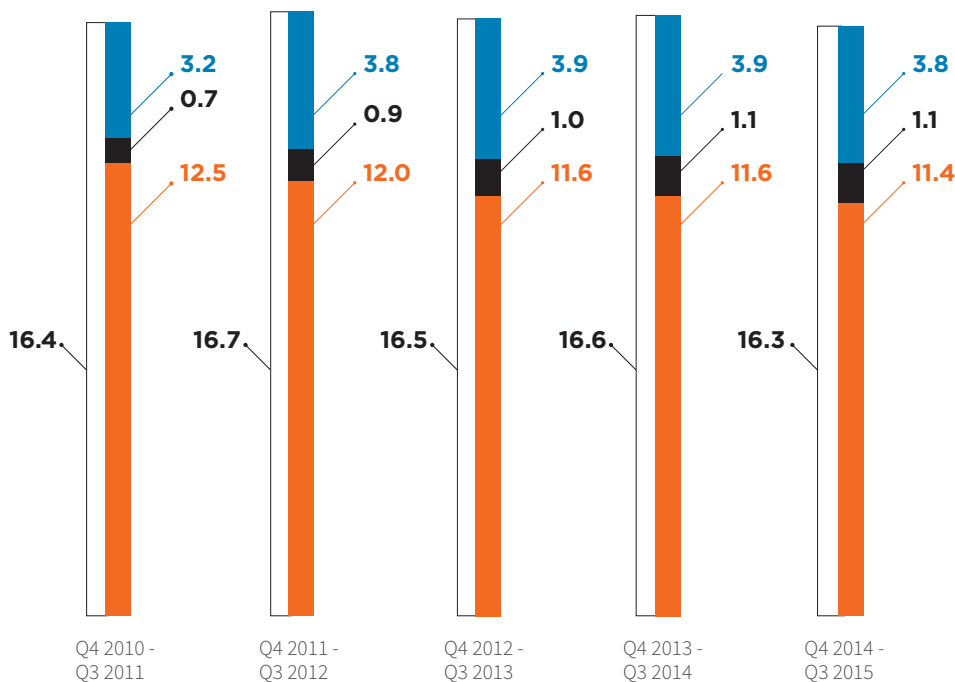


# Total use of the television set

**V**iewing of TV network streaming and video player services is one of many activities that connected or smart TVs can be used for. Others – whether via the internet or enabled by devices attached to the television set – include watching DVDs; playing back recorded broadcast material beyond the 7-day Consolidated ratings window; gaming; internet browsing; streaming music; and accessing over-the-top internet-delivered services.

Such functionality has seen Australians over the past five years increase the proportion of time they spend with their TV sets for purposes in addition to watching ‘conventional’ television: from 3.2 per cent TARP in 2010-11 to 3.8 per cent TARP in the latest four-quarter period.

## 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 Q4 2014 - Q3 2015 (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.



In the rolling four quarters to September 2015 Australians' total use of the television set – for watching live, playback and other purposes – averaged out at 16.3 TARP across the day. This is down from 16.6 per cent TARP a year earlier.

**Live** viewing declined 0.2 per cent TARP on the prior comparable period to 11.4 per cent TARP.

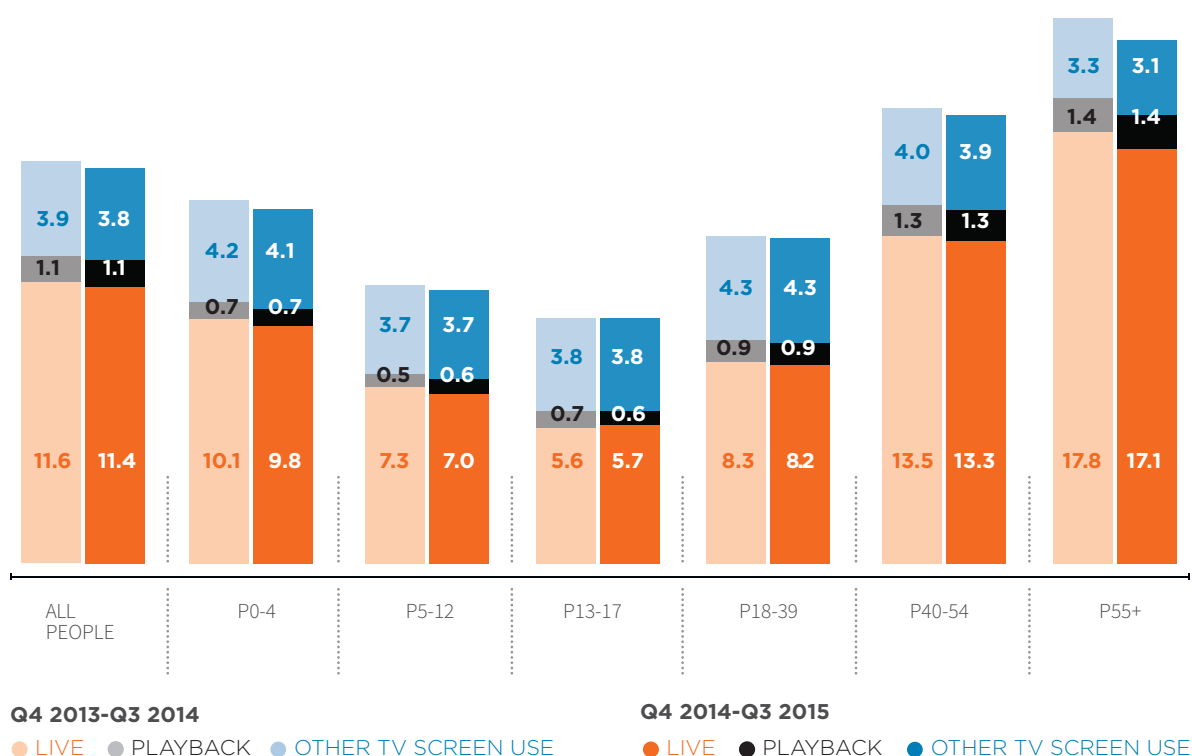
**Playback** (when people play broadcast material back through their TV set at normal speed within seven days of original broadcast) was steady at 1.1 per cent TARP.

**Other TV screen use**, as described above, eased by 0.1 per cent TARP year-on-year to 3.8 per cent TARP.

Other screen use among people between the ages of 5 and 39 was steady in the latest four-quarter period. Under-5s, and those aged 40 and older, devoted a slightly lower percentage of their total time with the TV to such activity compared to the previous year.

Australians across all age groups spend the majority of their TV screen time viewing broadcast television, whether live or played back within seven days.

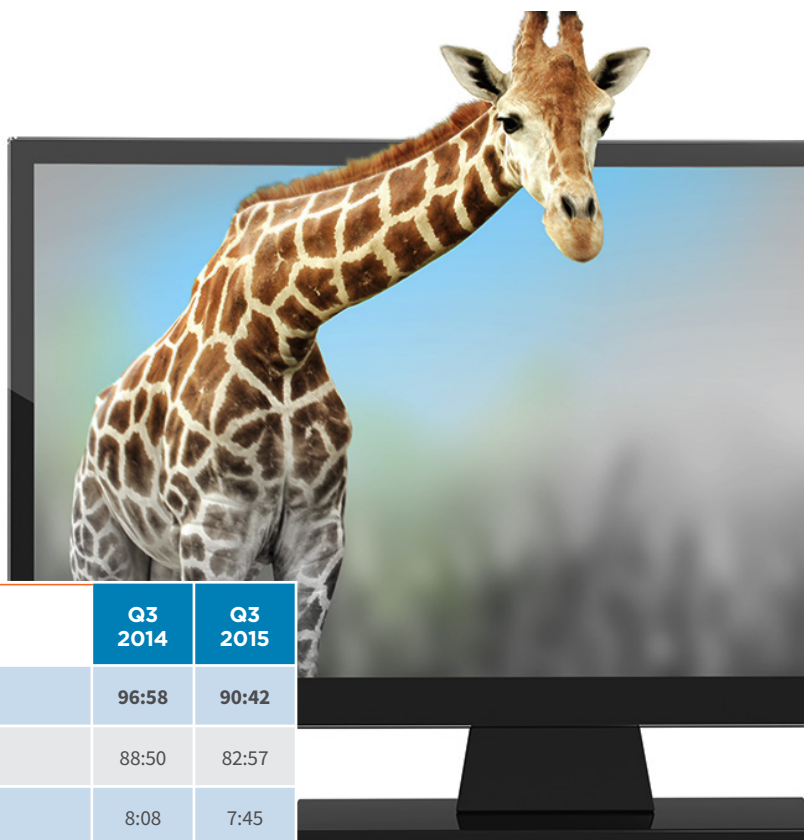
## TARP % BY DEMOGRAPHIC





# Other television screen use in Q3 2015

In Q3 2015 Australians on average spent an additional 2 hours and 18 minutes (2:18) per month on other television screen use compared to the same quarter a year earlier. The decline in broadcast viewing – evident in the rolling four quarters through Q3 2015 and discussed above – saw total TV screen use drop by 3:24 per month year-on-year.



	Q3 2014	Q3 2015
<b>WATCHING TV IN THE HOME</b>	<b>96:58</b>	<b>90:42</b>
Watching live TV	88:50	82:57
Watching playback* TV	8:08	7:45

	Q3 2014	Q3 2015
<b>TOTAL TV SCREEN USE</b>	<b>123:43</b>	<b>120:19</b>
Watching live TV	88:50	82:57
Watching playback^ TV	8:20	8:31
Other screen use	26:32	28:50

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

## 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 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 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.





## KEY OBSERVATIONS

TABLE 01 <b>TECHNOLOGY PENETRATION</b>	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015
<b>COMPLETELY DTT:</b> Penetration within TV households (Homes capable of receiving DTT on <b>each</b> working TV within the home)	95%	95%	96%	96%	97%
<b>HD TV:</b> Penetration within TV households (Homes capable of receiving HD DTT on <b>each</b> working TV within the home)	92%	92%	93%	94%	95%
<b>PERSONAL VIDEO RECORDER (PVR):</b> Penetration within TV households	55%	56%	56%	57%	57%
<b>2+PVR:</b> Penetration within TV households	15%	15%	15%	16%	16%
<b>INTERNET CONNECTION:</b> Household penetration <sup>1</sup>	80%	80%	80%	80%	80%
<b>TABLETS:</b> Household penetration	45%	47%	47%	47%	49%
<b>INTERNET CAPABLE TV IN HOME</b> (Whether connected or not)	29%	30%	30%	30%	31%
<b>SMARTPHONES:</b> People 14+ <sup>2</sup>	76%	76%	76%	79%	80%

TABLE 02 <b>MONTHLY TIME SPENT</b> (HH:MM)	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015
Watching TV in the home <sup>3</sup>	96:58	90:27	89:28	90:53	90:42
Watching Playback TV	8:08	7:21	7:31	8:11	7:45
Online time spent per person <sup>4</sup>	37:44	37:08	35:51	37:31	34:44
Watch video on Internet <sup>5</sup>	7:30	7:28	6:57	7:32	7:48
Watching online video on a smartphone <sup>6</sup> (Q4 2014)	N.A.	2:47	N.A.	N.A.	N.A.
Watching online video on a tablet <sup>6</sup> (Q4 2014)	N.A.	2:03	N.A.	N.A.	N.A.

<sup>1</sup>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. Commencing Q3 2015, ES-based estimates are based on a national footprint as an extension of the previous coverage from combined Metro & Regional TAM survey areas.

<sup>2</sup>Source: Nielsen Online Ratings Establishment Survey, national population 14+, Q3 2014 – Q3 2015

<sup>3</sup>Source: Combined OzTAM Metro and Regional TAM databases with overlap homes de-duplicated. Average time spent viewing (ATV 0200-2600). 'Watching TV' and 'Watching Playback TV' are both based on Consolidated data. Playback viewing is up to 7 days after broadcast. Includes free-to-air and subscription television viewing.

<sup>4</sup>Source: Nielsen Online Ratings – 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.

<sup>5</sup>Source: Nielsen Online Ratings – Hybrid Streaming. Figures are national and for People 2+. Home and Work panel only. Due to a change in methodology comparisons prior to Q4 2012 cannot be made.

<sup>6</sup>Smartphone and tablet video source: Nielsen Australian Connected Consumer report for respondents aged 16 years and over (inclusive of total online population regardless of device ownership or video consumption). Monthly estimate based on reported weekly time spent multiplied by average number of weeks in a month. Figure relates to online video only.



TABLE 03

OVERALL USE (000S), MONTHLY REACH	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015
Watching TV in the home <sup>7</sup>	21,789	21,813	22,158	22,193	22,175
Watching Playback TV	11,352	11,469	11,769	12,226	12,103
Online unique audience <sup>8</sup>	17,585	17,704	18,001	18,117	18,392
Watch video on Internet <sup>9</sup>	13,377	13,288	13,343	13,711	13,352
Owning/using a smartphone <sup>10</sup>	14,662	14,546	14,662	15,406	15,639
Watching online video on smartphone <sup>11</sup> (Q4 2014)	N.A.	3,470	N.A.	N.A.	N.A.
Watching online video on tablet <sup>11</sup> (Q4 2014)	N.A.	2,479	N.A.	N.A.	N.A.

TABLE 04

A MONTH IN THE LIFE - Q3 2015	KIDS <sup>12</sup>	TEENS <sup>13</sup>	P18-24	P25-34	P35-49	P50-64	P65+	ALL PEOPLE
Watching TV in the home <sup>7</sup> Q3 2014	64:58 69:11	38:22 47:20	39:24 44:23	61:31 75:45	93:12 102:32	126:51 131:42	155:33 154:29	90:42 96:58
Watching Playback TV Q3 2014	4:56 4:48	3:23 4:40	4:14 4:44	5:56 7:14	9:01 9:24	10:33 11:05	11:36 11:01	7:45 8:08
Online time spent per person <sup>8</sup>	5:12	8:29	29:55	37:24	39:40	42:29	28:35	34:44
Watch video on Internet <sup>9</sup>	6:33	8:06	15:15	9:07	8:09	5:45	4:31	7:48
Watching online video on a smartphone <sup>14</sup> (Q4 2014)	N.A.	14:08	8:30	4:36	1:53	0:23	0:05	2:47
Watching online video on tablet <sup>14</sup> (Q4 2014)	N.A.	7:28	3:13	4:10	1:50	0:46	0:30	2:03

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

<sup>8</sup> Source: Nielsen Online Ratings – Hybrid Surfing. Estimate is the average of the 3 months within the calendar quarter. Figure includes all online activities inclusive of PC applications such as iTunes, Skype etc.

<sup>9</sup> Source: Nielsen Online Ratings – Hybrid Streaming. Figures are national and for People 2+. Home and Work panel only. Due to a change in methodology comparisons prior to Q4 2012 cannot be made.

<sup>10</sup> Source: Nielsen Online Ratings Establishment Survey, national population 14+, Q3 2014 – Q3 2015

<sup>11</sup> Nielsen Australian Connected Consumers report - national figures produced annually citing 21% of the online population aged 16+ for smartphone video and 15% for tablet video in 2014. Audience figure calculated using national online active audience of 16,524,000 from Nielsen Online Ratings (December 2014).

<sup>12</sup> Combined Metro OzTAM and Regional TAM data defines 'Kids' aged 0-12 and Nielsen Netview aged 2-11.

<sup>13</sup> Combined Metro OzTAM and Regional TAM data defines 'Teens' aged 13-17, Nielsen Netview aged 12-17 and Nielsen ACC aged 16-17.

<sup>14</sup> Smartphone and tablet video source: Nielsen Australian Connected Consumer report for respondents aged 16 years and over (inclusive of total online population regardless of device ownership or video consumption). Monthly estimate based on reported weekly time spent multiplied by average number of weeks in a month. Figure relates to online video only.



TABLE 04A A MONTH IN THE LIFE - BY QUARTER

KIDS <sup>12</sup>	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015
Watching TV in the home <sup>7</sup>	69:11	63:58	62:58	64:25	64:58
Watching Playback TV	4:48	4:34	4:38	4:58	4:56
Online time spent per person <sup>8</sup>	4:56	4:52	4:40	5:42	5:12
Watch video on Internet <sup>9</sup>	4:44	5:47	8:08	7:54	6:33

TEENS <sup>13</sup>	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015
Watching TV in the home <sup>7</sup>	47:20	43:07	37:55	38:31	38:22
Watching Playback TV	4:40	4:34	3:57	3:51	3:23
Online time spent per person <sup>8</sup>	9:58	12:51	10:39	7:57	8:29
Watch video on Internet <sup>9</sup>	5:28	7:02	6:07	3:39	8:06
Watching online video on smartphone <sup>14</sup> (Q4 2014)	N.A.	14:08	N.A.	N.A.	N.A.
Watching online video on tablet <sup>14</sup> (Q4 2014)	N.A.	7:28	N.A.	N.A.	N.A.

P18-24	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015
Watching TV in the home <sup>7</sup>	44:23	40:02	40:03	41:34	39:24
Watching Playback TV	4:44	4:12	4:37	4:52	4:14
Online time spent per person <sup>8</sup>	36:23	34:14	30:26	35:08	29:55
Watch video on Internet <sup>9</sup>	9:09	10:56	11:11	14:58	15:15
Watching online video on smartphone <sup>14</sup> (Q4 2014)	N.A.	8:30	N.A.	N.A.	N.A.
Watching online video on tablet <sup>14</sup> (Q4 2014)	N.A.	3:13	N.A.	N.A.	N.A.

P25-34	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015
Watching TV in the home <sup>7</sup>	75:45	68:21	66:36	65:52	61:31
Watching Playback TV	7:14	6:08	5:59	6:43	5:56
Online time spent per person <sup>8</sup>	41:09	41:07	39:22	39:30	37:24
Watch video on Internet <sup>9</sup>	7:17	9:41	9:00	7:37	9:07
Watching online video on smartphone <sup>14</sup> (Q4 2014)	N.A.	4:36	N.A.	N.A.	N.A.
Watching online video on tablet <sup>14</sup> (Q4 2014)	N.A.	4:10	N.A.	N.A.	N.A.





TABLE 04A A MONTH IN THE LIFE - BY QUARTER

<b>P35-49</b>	<b>Q3 2014</b>	<b>Q4 2014</b>	<b>Q1 2015</b>	<b>Q2 2015</b>	<b>Q3 2015</b>
Watching TV in the home <sup>7</sup>	102:32	93:53	91:53	92:54	93:12
Watching Playback TV	9:24	8:43	9:04	9:42	9:01
Online time spent per person <sup>8</sup>	42:22	39:28	40:21	41:37	39:40
Watch video on Internet <sup>9</sup>	7:17	6:39	6:32	7:34	8:09
Watching online video on smartphone <sup>14</sup> (Q4 2014)	N.A.	1:53	N.A.	N.A.	N.A.
Watching online video on tablet <sup>14</sup> (Q4 2014)	N.A.	1:50	N.A.	N.A.	N.A.

<b>P50-64</b>	<b>Q3 2014</b>	<b>Q4 2014</b>	<b>Q1 2015</b>	<b>Q2 2015</b>	<b>Q3 2015</b>
Watching TV in the home <sup>7</sup>	131:42	124:59	122:55	126:13	126:51
Watching Playback TV	11:05	9:41	9:52	10:49	10:33
Online time spent per person <sup>8</sup>	45:21	45:47	44:08	46:59	42:29
Watch video on Internet <sup>9</sup>	7:05	7:21	6:08	7:06	5:45
Watching online video on smartphone <sup>14</sup> (Q4 2014)	N.A.	0:23	N.A.	N.A.	N.A.
Watching online video on tablet <sup>14</sup> (Q4 2014)	N.A.	0:46	N.A.	N.A.	N.A.

<b>P65+</b>	<b>Q3 2014</b>	<b>Q4 2014</b>	<b>Q1 2015</b>	<b>Q2 2015</b>	<b>Q3 2015</b>
Watching TV in the home <sup>7</sup>	154:29	148:03	150:33	152:36	155:33
Watching Playback TV	11:01	10:10	10:33	11:53	11:36
Online time spent per person <sup>8</sup>	45:21	30:22	27:05	28:43	28:35
Watch video on Internet <sup>9</sup>	3:39	3:54	3:13	3:35	4:31
Watching online video on smartphone <sup>14</sup> (Q4 2014)	N.A.	0:05	N.A.	N.A.	N.A.
Watching online video on tablet <sup>14</sup> (Q4 2014)	N.A.	0:30	N.A.	N.A.	N.A.

<b>ALL PEOPLE</b>	<b>Q3 2014</b>	<b>Q4 2014</b>	<b>Q1 2015</b>	<b>Q2 2015</b>	<b>Q3 2015</b>
Watching TV in the home <sup>7</sup>	96:58	90:27	89:28	90:53	90:42
Watching Playback TV	8:08	7:21	7:31	8:11	7:45
Online time spent per person <sup>8</sup>	37:44	37:08	35:51	37:31	34:44
Watch video on Internet <sup>9</sup>	7:30	7:28	6:57	7:32	7:48
Watching online video on smartphone <sup>14</sup> (Q4 2014)	N.A.	2:47	N.A.	N.A.	N.A.
Watching online video on tablet <sup>14</sup> (Q4 2014)	N.A.	2:03	N.A.	N.A.	N.A.



TABLE 05 VIDEO AUDIENCE COMPOSITION (BY AGE AND GENDER)

Q3 2015	KIDS	TEENS	P18-24	P25-34	P35-49	P50-64	P65+	FEMALES	MALES
On Traditional TV <sup>7</sup> Q3 2014	12% 12%	3% 3%	4% 4%	10% 11%	21% 22%	25% 25%	25% 23%	53% 53%	47% 47%
On Internet <sup>9</sup> Q3 2014	4% 3%	5% 4%	10% 10%	17% 20%	29% 28%	23% 23%	12% 11%	50% 51%	50% 49%



# Explanatory Notes

- Panel install incidence rates for DTT and PVR are based on combined OzTAM Metro and Regional TAM panels as at last date of each period (Q1=end of P4, Q2=end of P7, Q3=end of P10, Q4=end of P13).
- Quarterly Establishment Survey waves are conducted within standard calendar quarters.
- National Establishment Survey (ES) estimates are based on combined OzTAM Metro and Regional TAM quarterly waves. Quarterly ES waves are conducted within standard calendar quarters.
- Playback mode is defined as television broadcast content recorded and viewed (played back) within seven days of the original broadcast time.
- Other Screen Use is TV screen use that excludes live and playback viewing of broadcast television within seven days of the original broadcast time. It can include non-broadcast activities such as gaming, online activity on the TV screen and playing back recorded TV content outside of the seven-day consolidation window.
- 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 seven 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 seven days is attributed back to the time at which the program actually went to air: in other words Consolidated viewing).
- Average time spent viewing (ATV) is calculated as the daily average time (0200-2600) within the universe across all days in the calendar quarter multiplied by the factor of numbers of days in the quarter divided by three (3).
- Monthly reach for TV is based on the average of the calendar month cumulative reach audience (0200-2600) within the quarter.
- Video content is defined as a stream where both audio and video are detected. Video viewership excludes adult and advertising content, as well as downloaded content.
- Wherever possible, geographic and demographic data have been matched for like comparisons.
- Nielsen Australian Connected Consumers report 2015 (ACC) based on online national population aged 16+.
- 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 defines 'Kids' as panel members aged 0-12, 'Teens' aged 13-17 and 'Male' / 'Female' as total individuals aged 0+.
- Nielsen Netview defines 'Kids' as panel members aged 2-11, 'Teens' aged 12-17 and 'Male' / 'Female' as individuals aged 2+.
- Nielsen Australian Connected Consumers report defines 'Teens' as respondents aged 16-17 and 'Male' / 'Female' respondents aged 16+.
- Nielsen has implemented page crediting improvements in the measurement of web pages and time spent across all online activities, driving a trend break for May 2013 data onwards for time spent online. As part of these improvements, the previous metric of 'PC time spent' has been retired and 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).
- 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 which is so critical to how we ensure accurate measurement of Australian internet consumption.





## For more information



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