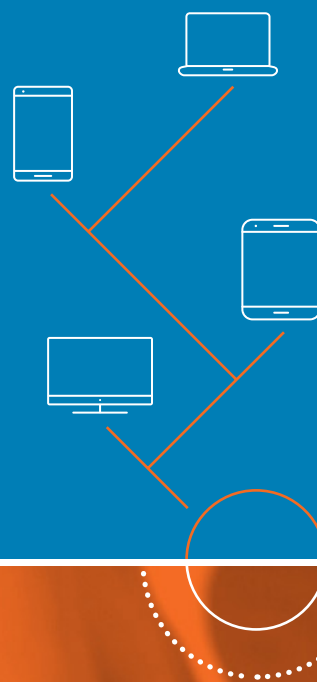


# AUSTRALIAN MULTI-SCREEN REPORT

QUARTER 03 2016



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# Australian viewing trends across multiple screens

**T**he Q3 2016 Australian Multi-Screen Report shows Australian homes have more screens, channel and platform choices – and therefore greater opportunity to watch television and other video – than ever before.

Together these changes affect the time consumers spend with various devices, as people continue to spread their viewing across seemingly infinite options within a finite number of available hours each day.

The Multi-Screen Report has documented this progressive evolution in audience behaviour each quarter for the past five years.

## Ongoing trends are clear:

### ‘Traditional’ television viewing remains dominant.

- Across the population, all screens and video types, broadcast TV content watched on in-home TV sets comprises 86.5 per cent of viewing time.
- 20.19 million Australians, or 86 per cent of the population in people metered markets, watch at least some broadcast TV (free-to-air and subscription channels) weekly: on average 90 hours and 16 minutes per Australian each month.
- The gradual decline in time spent viewing live and playback TV over the past five years follows the spreading behaviour that screen, content and platform choice enable. Even so, all age groups spend more of their video viewing time watching broadcast TV on television sets than they do on any other single device.



### The number of connected screens in households is rising while the number of TV sets has fallen slightly.

- The average Australian home now has 4.5 connected screens in addition to their TV sets, up from 3.9 four years ago. The number of TV sets is fractionally lower today however, at 1.8.
- More screens create different options to view, meaning people spend a little less time with their TV sets.




## The way Australians use their TV sets is changing, most noticeably in prime time.

- TV screens can be used for many activities in addition to watching TV, therefore the proportion of time people spend using their TV sets for other purposes is growing.
- The rise in other TV screen use is particularly evident in peak viewing hours, and it is impacting time spent viewing live and playback TV.

## 'Longer tail' viewing is growing.

- While the majority of TV material played back through the TV set happens within the first seven days, 1.7 per cent of all broadcast TV watched on in-home 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 1.6 per cent.
- OzTAM's Video Player Measurement (VPM) service shows approximately 1 per cent of all broadcast TV viewing takes place on connected devices.
- Together, 8-28 day playback on TV sets and VPM content played on connected devices account for approximately 2.5 to 3 per cent of all broadcast TV content watched. This viewing is on top of OzTAM and Regional TAM Consolidated 7 viewing data.



**Note: Time spent watching TV on in-home sets - understanding 'when watched' viewing data.**

To illustrate the impact of viewing at the time it actually takes place, viewing data in the Australian Multi-Screen Report since Q1 2016 is **'when watched'**. In the daily 24 hours available, 'when watched' data shows the times at which people actually view broadcast TV content *through their TV sets*. 'When watched' yields 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' 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. The OzTAM and Regional TAM Consolidated 7 and Consolidated 28 viewing databases (which data users access via analytical software) use 'what watched', which remains the basis for time-shifted viewing figures.

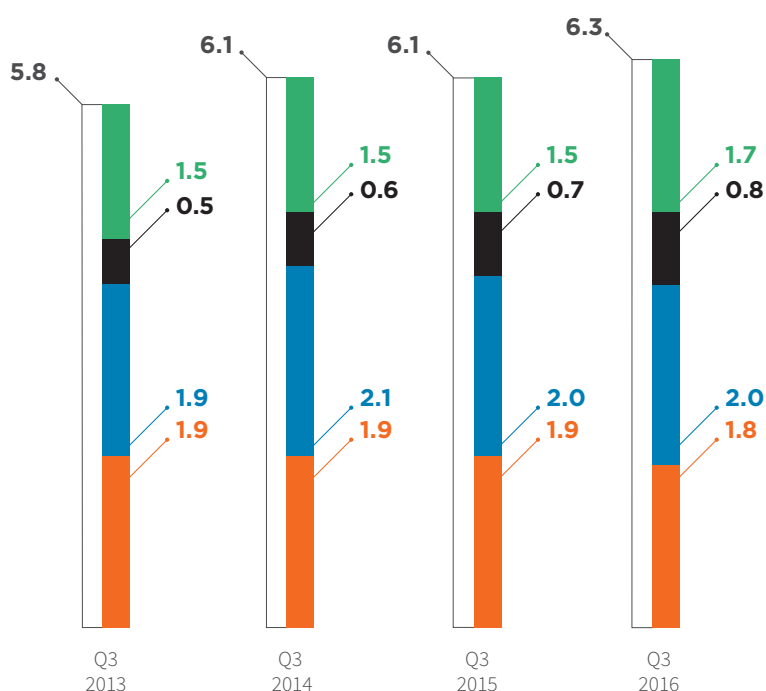
# Technology snapshot: screens in Australian homes

The steady take-up of new technologies that offer more flexibility to watch TV and other video has been apparent throughout the Australian Multi-Screen Report's history.

Australian homes had an average of 6.3 screens each in Q3 2016 – up from 6.1 a year earlier and 5.8 in Q3 2013. Although the TV set remains the most-watched

individual screen the number of TVs has fallen slightly: from 1.9 four years ago to 1.8 today. Over the same period the number of portable devices – especially tablets – has grown, such that the majority of screens in the average Australian home are now internet-capable.

## AVERAGE NUMBER OF DEVICES PER HOME



○ ALL SCREENS ○ PC ○ TABLET ○ MOBILE PHONES ○ TV

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.

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As 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 2.8 million connected devices access online catch up TV each week.

Because people often retain an older device for secondary use when upgrading to a new model, penetration levels for various device types are levelling off even as the number of screens in households grows.

**Internet-capable televisions** ('smart' or 'hybrid' TVs) have seen the fastest year-on-year take-up: 37 per cent of homes now have one (whether connected or not), up from 31 per cent a year ago. 84 per cent of Australians aged 14 and older own a **smartphone**, compared to 80 per cent a year earlier.

**Tablet** penetration has been steady at 49 per cent for the past five consecutive quarters.

All Australian TV homes can receive **digital terrestrial television** (DTT) channels, with close to 20 free-to-air and more than 100 subscription TV channels available. In 97 per cent of homes every working TV set can access DTT channels, while in 96 per cent every TV set is **high definition** (HD)-capable.

**Personal video recorders** (PVRs) are in 60 per cent of homes (57 per cent a year ago). 17 per cent have two or more.

80 per cent of homes have an **internet connection** and this has been steady over the past four years.



# TECHNOLOGY PENETRATION

Q3 2013 Q3 2014 Q3 2015 Q3 2016

89% 95% 97% 97%



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

85% 92% 95% 96%



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

53% 55% 57% 60%



PERSONAL VIDEO RECORDER (PVR): PENETRATION WITHIN TV HOUSEHOLDS

14% 15% 16% 17%



2+ PVR: PENETRATION WITHIN TV HOUSEHOLDS

80% 80% 80% 80%



INTERNET CONNECTION: HOUSEHOLD PENETRATION

37% 45% 49% 49%



TABLETS: HOUSEHOLD PENETRATION

22% 29% 31% 37%



INTERNET CAPABLE TV IN HOME

68% 76% 80% 84%



SMARTPHONE: MOBILE PHONE SUBSCRIBERS\*

\*Source for Smartphone: Mobile Phone Subscribers: Nielsen Consumer & Media View, national population 16+ Q3 2013 and Q3 2014 and Nielsen Online Ratings Establishment Survey, national population 14+ Q3 2015 and Q3 2016. Internet connection and tablet penetration: rolling four-quarter average Q4 2015-Q3 2016, OzTAM and Regional TAM quarterly Establishment Surveys.

# Viewing across devices

**A**mid dramatic increases in channel, platform and device choice, television remains the single most-watched screen. The greatest share of viewing across the population as a whole, and among all age groups, occurs on TV sets.

On average 86 per cent of the population (20.19 million people) watch at least some **broadcast TV on in-home sets** (free-to-air and/or subscription channels) weekly. Reach remains strong among all age groups: 69 per cent of 18-24s, who are relatively light TV viewers compared to the population as a whole, watch weekly.



## BROADCAST TV VIEWING ON IN-HOME TV SETS EACH WEEK

	Q3 2015 CONSOLIDATED TO 7 DAYS	Q3 2016 CONSOLIDATED TO 28 DAYS	Q3 2016 CONSOLIDATED TO 28 DAYS
	% REACH	% REACH	WEEKLY AVERAGE CUMULATIVE REACH
TOTAL PEOPLE	87.6	86.0	20.19m
KIDS	88.8	87.5	3.35m
TEENS	78.4	77.1	1.1m
P16-24	72.5	69.1	1.53m
P25-39	85.0	82.0	4.13m
P40-54	92.4	91.8	4.33m
P55-64	93.6	92.8	2.48m
P65+	92.9	92.0	3.27m

Average 1-minute weekly cumulative reach across the population in OzTAM and Regional TAM coverage areas. Includes live viewing and playback through the TV set at the time it is watched ('when watched') within 28 days (Q3 2016) and playback through the TV set within seven days (Q3 2015).

Please note the differing playback bases if making year-on-year comparisons, as explained in the note on page 4, Appendix (page 26) and Explanatory Notes (page 27).





**Turning to time spent viewing broadcast TV on in-home sets only:** across the population 90.1 per cent [81 hours and 21 minutes (81:21)] is watched live-to-air each month. 8.2 per cent (7:22) is played back through the TV set within seven days, and 1.7 per cent (1:33) is played back between eight and 28 days of the original broadcast.

**Taking into account all screens, all devices and all types of video across the population:** 86.5 per cent of viewing (90:16) is TV content watched on in-home sets within 28 days of original broadcast

(left-hand side of graphic, 'Video viewing, average time spent per month'.)

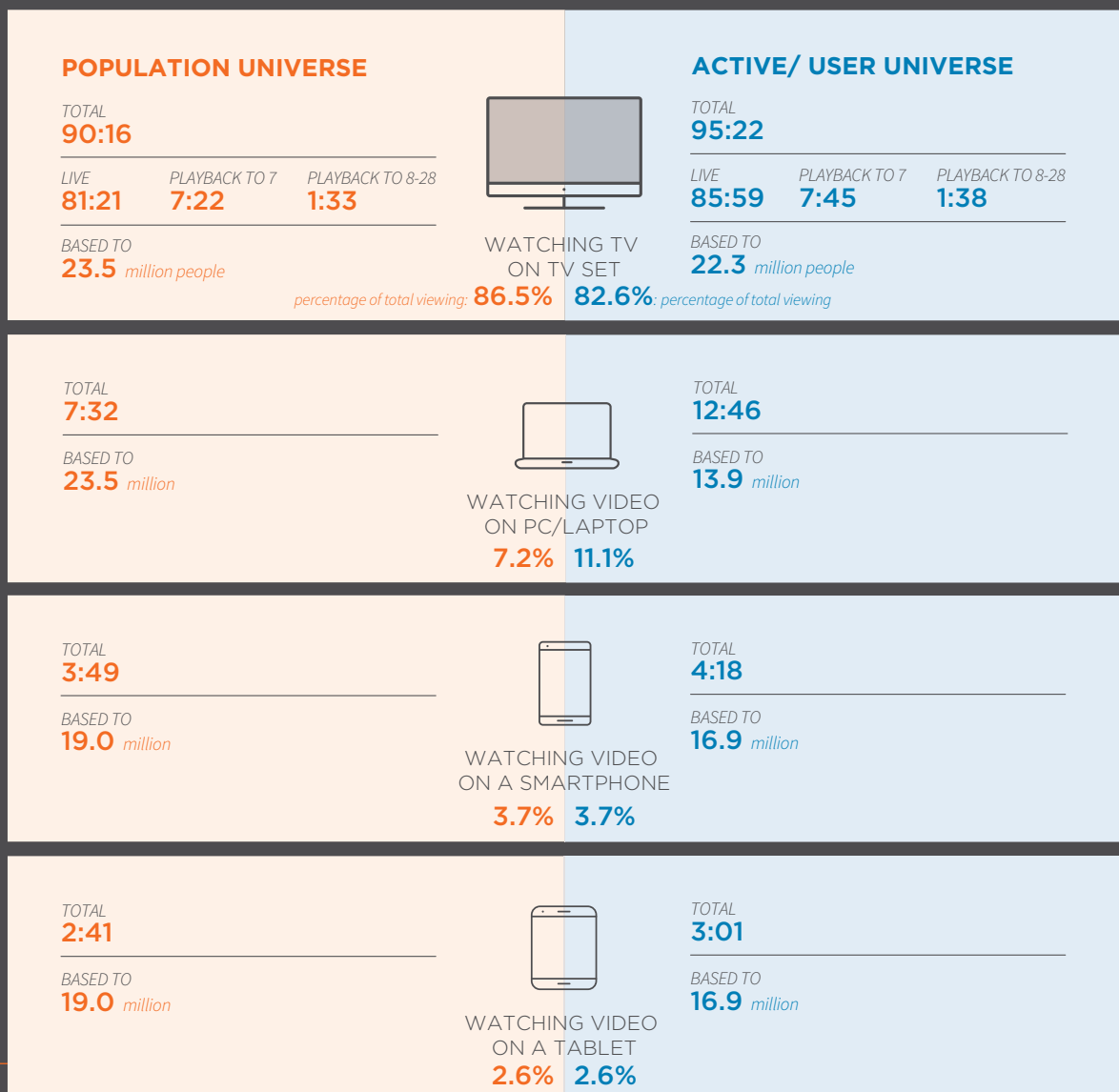
**Looking only at viewers or users in the respective TV and active online universes:** TV accounts for 82.6 per cent of viewing (right-hand side of graphic, 'Video viewing, average time spent per month'.)

These share of viewing figures are illustrated in the following graphic:



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

TV // PC // SMARTPHONE // TABLET



↓ Data explanation on next page



The figures above show both the population universe (per person, across the population as a whole within OzTAM and Regional TAM coverage areas) 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 viewed ('when watched' TV; for details see note on page 4, the Appendix or Explanatory Notes).

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-broadcast. Streaming figures are for July-September 2016<sup>1</sup>.

Viewing on smartphones and tablets is claimed behaviour by an annual survey of active online Australians aged 16+ from Nielsen's Australian Connected Consumers Report and includes all online video.

Percentages have been rounded.

The combined impact of more choice yet the same number of hours in the day in which to view means Australians spend a little less time on a typical day watching broadcast TV on in-home TV sets than they did a year ago. The tendency to spread viewing is most evident among younger audiences, though all major age groups devote the largest proportion of their viewing time on any single device to broadcast TV on in-home sets.

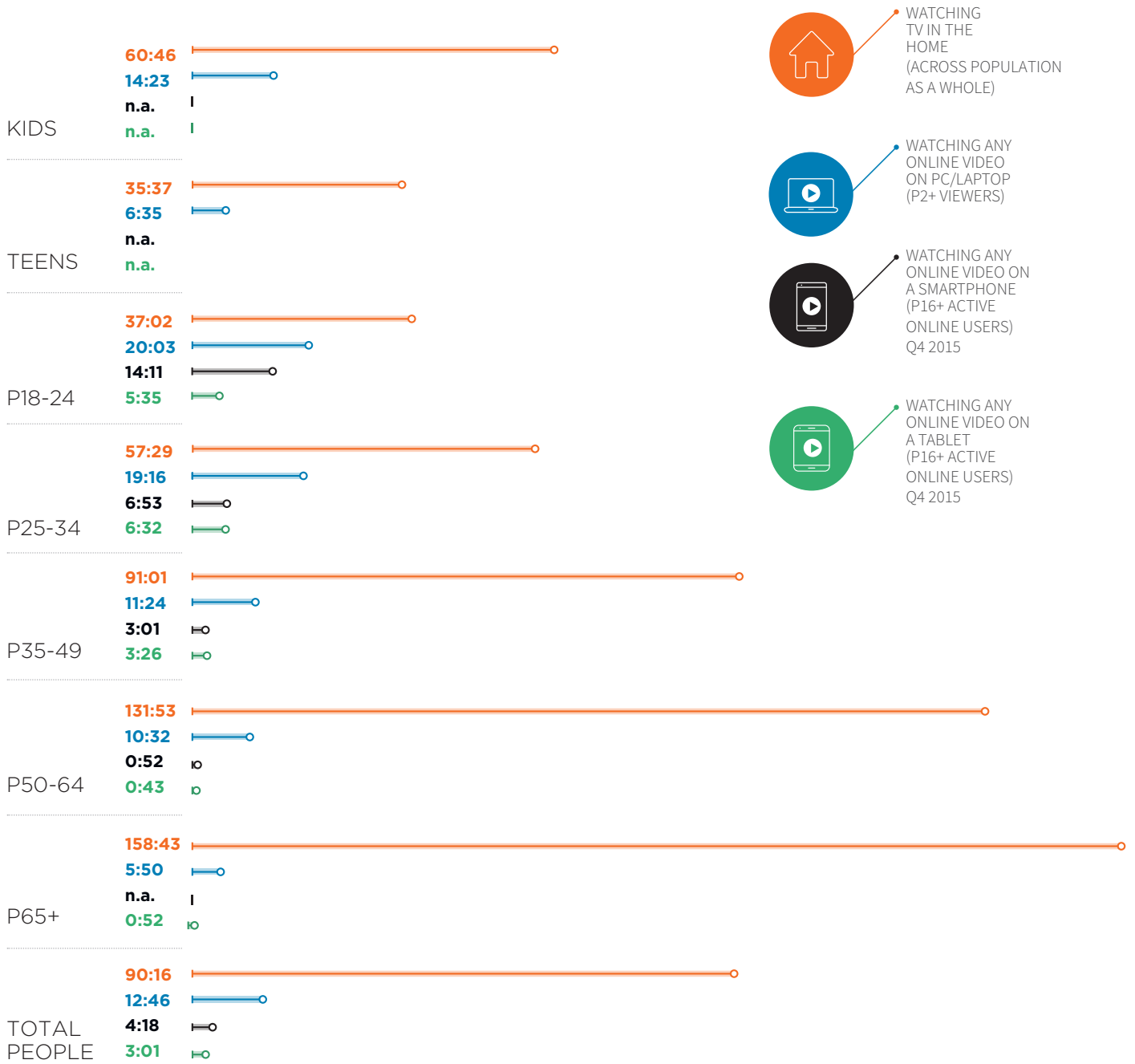
Australians aged 2+ who watched **any online video on a PC or laptop** (in other words, active users) spent 12:46 per month doing so in Q3 2016. Across the population that equates to 7:32 per person each month. This material includes streamed video (e.g., internet-delivered catch up TV, live streaming and subscription video services) and video such as YouTube, Facebook and Vimeo.

Time spent online on any device accounted for 62:28 per active user aged 2+ each month in the quarter<sup>2</sup>.

Active online Australians aged 16 and older 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).

# A MONTH IN THE LIFE (HH:MM)

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



Watching TV in the home is Consolidated 28 'when-watched' data across the population. Please see note on page 4, Appendix or Explanatory Notes for details. Time spent watching any online video on PC/smartphone/tablet is per active viewer or user.



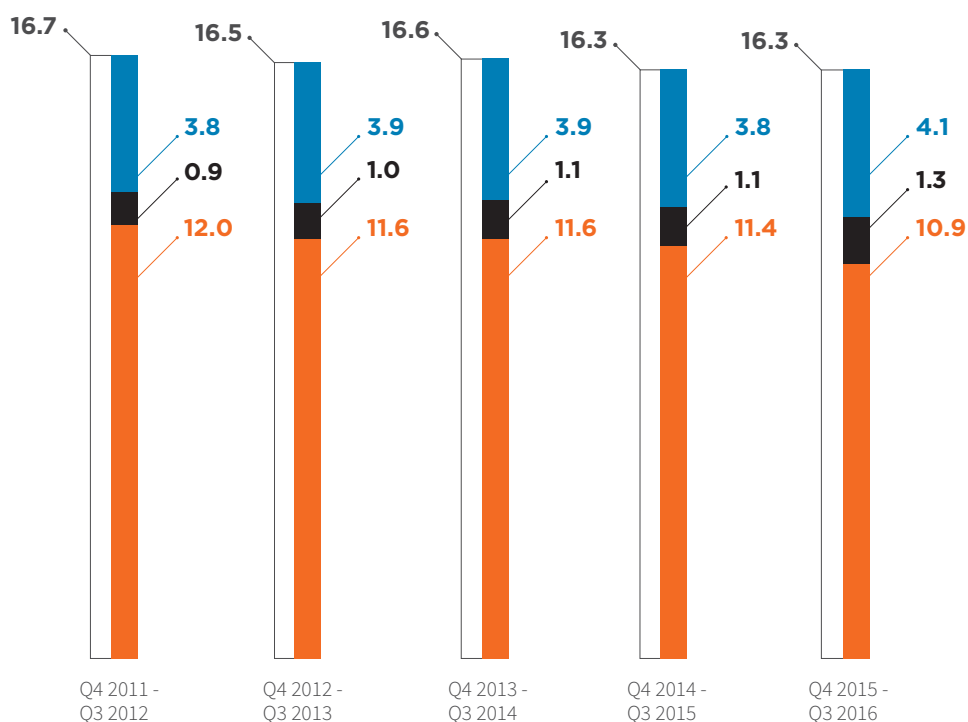
# Total use of the television set

For several years, as TV sets have become increasingly multi-functional, the way Australians use them has been changing – providing another example of how screen activity is spreading and in the process impacting the time people spend with different devices and the activities they undertake on them, too.

The shifting composition of **total TV set use** follows adoption of internet-capable sets and/or devices attached to the TV set that enable ‘**other TV screen use**’. It captures activities such as 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.

Australians’ total use of their TV sets was constant year-on-year in the latest four-quarter period. The proportion of time people devoted to other screen use rose from 3.8 per cent TARP in the rolling four-quarter period through Q3 2015 to 4.1 per cent TARP now. **Playback** of broadcast content through the TV reached 1.3 per cent TARP (note Q1-Q3 2016 include playback up to 28 days; Q4 2015 includes 7-day playback only). **Live** viewing through the TV set fell however to 10.9 per cent TARP from 11.4 per cent TARP a year ago. Since 2011/12 live viewing has dropped by 1.1 per cent TARP.

## 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 2015 - Q3 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 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 2016 onwards include playback 'when watched' up to 28 days.

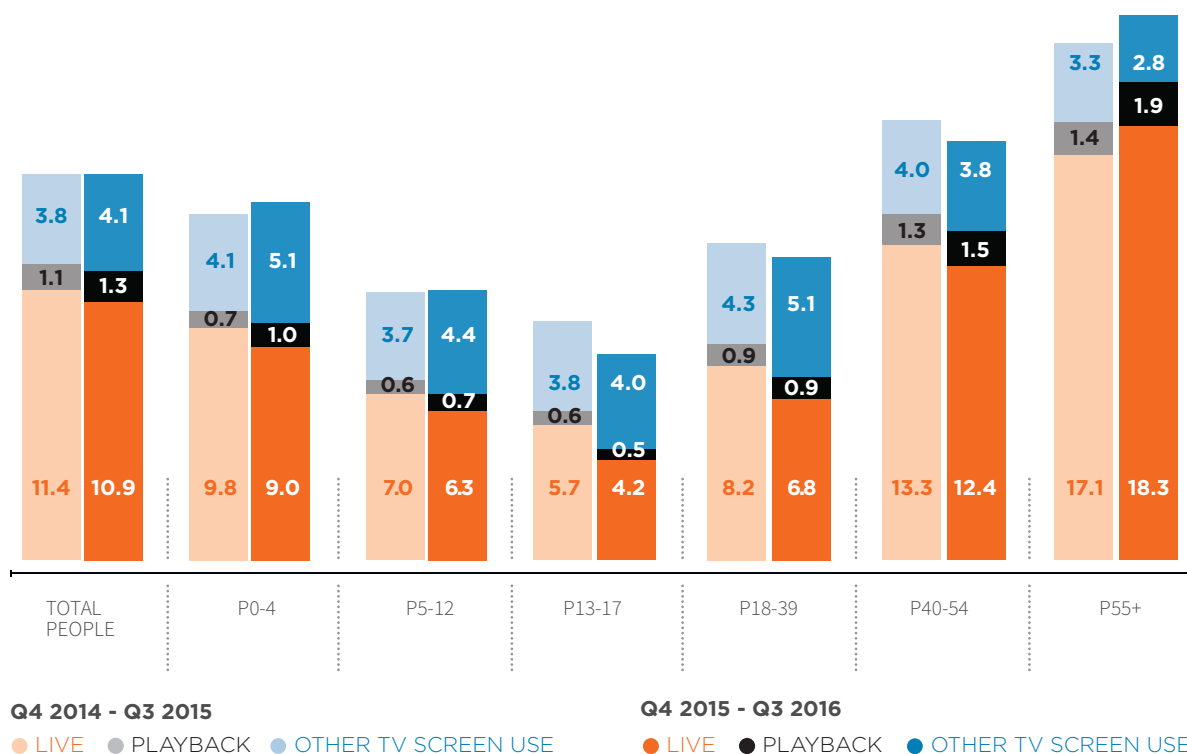


Most age groups watched more playback TV in the latest four-quarter period than they did a year earlier, reflecting the inclusion of 8-28 day viewing. As mentioned earlier in the report, as of Q3 2016, 8-28 day playback accounts for 1.7 per cent of broadcast TV viewed on in-home TV sets.

People aged 55 and older watched more live TV in the latest four-quarter period than they did a year earlier. Though their other TV screen use fell, growth in live and playback TV viewing saw their total use of the TV set increase year-on-year. Kids aged 12 and under also increased their total TV screen use, driven by 1 per cent (kids under 4) and 0.7 per cent (kids aged 5-12) TARP growth in other TV screen use.

All age groups under 40 increased their other screen use year-on-year. Playback was steady or higher for all age groups except 13-17s, where it declined by 0.1 per cent TARP. 13-17s devote the greatest proportion of their total TV screen time to other TV screen use: 4.0 per cent TARP in the latest period, which is only slightly lower than the share they devote to watching live TV.

## TARP % BY DEMOGRAPHIC



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 2016 onwards include playback 'when watched' up to 28 days.



# Viewing patterns across the day

Successive issues of the Multi-Screen Report have shown changes in viewing behaviour are most pronounced in prime time. This makes sense, as people generally have the most available time to view in the evenings.

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 8 hours and 55 minutes (8:55) per person across the population each month in the latest quarter. In prime time, such viewing was 4:55.

On an all-day (24-hour) basis, other TV screen use went from 28:50 per Australian each month in Q3 2015 (including 8-28 day playback viewing) to 29:38 per month excluding 8-28 day playback viewing in Q3 2016. On the same basis, other TV screen use

in prime time rose by 27 minutes. Across the day Australians spend 25 per cent of their time with the TV set on purposes other than watching live or playing back broadcast TV within 28 days. In prime time the proportion is 22 per cent.

Together, other TV screen use and 8-28 day playback viewing now account for 14:13 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 24 minutes on average per month across the day, and by 1:58 in prime time, impacted by the decline in broadcast viewing.

TOTAL PEOPLE				
	0200-2600		1800-2400	
	Q3 2015	Q3 2016	Q3 2015	Q3 2016
<b>TOTAL TV SCREEN USE</b>	<b>120:19</b>	<b>119:55</b>	<b>63:00</b>	<b>61:02</b>
<b>TOTAL BROADCAST TV:</b>	<b>91:29</b>	<b>90:16</b>	<b>50:01</b>	<b>47:35</b>
Watching live TV	82:57	81:21	45:19	42:39
Watching playback to 7 TV	8:31	7:22	4:41	4:08
Watching playback 8-28 TV	n.a	1:33	n.a	0:47
<b>OTHER TV SCREEN USE</b>	<b>28:50</b>	<b>29:38</b>	<b>12:59</b>	<b>13:26</b>

Playback 'when watched' TV

Q3 2016 playback figures are to seven days and 8-28 days || Q3 2015 playback figures are to seven days.  
 Q3 2016 Other TV screen use **excludes** 8-28 day playback || Q3 2015 Other TV screen use **includes** 8-28 day playback.  
 For an explanation of 'when watched' please see note on page 4, the Appendix or Explanatory Notes.



## KEY OBSERVATIONS

TABLE 01 <b>TECHNOLOGY PENETRATION</b>	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016
Completely DTT: Penetration within TV households <sup>3</sup> (Homes capable of receiving DTT on <b>each</b> working TV within the home)	97%	97%	97%	97%	97%
HD TV: Penetration within TV households (Homes capable of receiving <b>HD DTT</b> on <b>each</b> working TV within the home)	95%	95%	95%	96%	96%
Personal video recorder (PVR): Penetration within TV households	57%	58%	58%	59%	60%
2+ PVR: Penetration within TV households	16%	17%	17%	17%	17%
Internet connection: Household penetration <sup>4</sup>	80%	80%	81%	81%	80%
Tablets: Household penetration	49%	49%	49%	49%	49%
Internet capable TV in home (whether connected or not)	31%	32%	35%	36%	37%
Smartphones: People 14+ <sup>5</sup>	80%	80%	81%	81%	84%

TABLE 02 <b>MONTHLY TIME SPENT (HH:MM)</b>	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016
Watching broadcast TV in the home per person across the population <sup>6</sup> :	90:42	85:17			
			86:51	90:01	90:16
Watching Live TV	82:57	77:57	77:44	80:22	81:21
Watching Playback to 7 TV <i>(what watched)</i>	7:45	7:20			
<i>(when watched)</i>			7:36	8:03	7:22
Watching Playback 8-28 TV	n.a	n.a			
<i>(when watched)</i>			1:31	1:36	1:33
Online time spent per active user <sup>7</sup>	34:44	31:12			
			50:30	54:44	
					62:28
Watching video on internet per viewer <sup>8</sup>				12:48	12:46
Watching online video on a smartphone per active online user <sup>9</sup> Q4 2015	n.a.	4:18	n.a.	n.a.	n.a.
Watching online video on a tablet per active online user <sup>9</sup> Q4 2015	n.a.	3:01	n.a.	n.a.	n.a.





TABLE 03

<b>OVERALL USE (000S), MONTHLY REACH</b>	<b>Q3 2015</b>	<b>Q4 2015</b>	<b>Q1 2016</b>	<b>Q2 2016</b>	<b>Q3 2016</b>
Watching broadcast TV in the home per person across the population <sup>6</sup> :	22,175	22,154			
			22,367	22,396	22,341
Watching Live TV	22,120	22,081	22,215	22,264	22,204
Watching Playback to 7 TV	12,103	12,343			
<i>(what watched)</i>					
<i>(when watched)</i>			12,629	12,556	12,642
Watching Playback 8-28 TV	n.a.	n.a.			
<i>(when watched)</i>			9,208	9,079	9,169
Online unique audience <sup>7</sup>	18,392	18,409			
			19,567	19,720	19,799
Watching video on internet per viewer <sup>8</sup>				13,970	13,850
Owning/using a smartphone <sup>9</sup>	15,639	15,647	16,183	16,261	16,720
Watching online video on a smartphone per active online user <sup>9</sup> Q4 2015	n.a.	4,065	n.a.	n.a.	n.a.
Watching online video on a tablet per active online user <sup>9</sup> Q4 2015	n.a.	2,710	n.a.	n.a.	n.a.

TABLE 04

<b>A MONTH IN THE LIFE - Q3 2016</b>	<b>KIDS<sup>10</sup></b>	<b>TEENS<sup>11</sup></b>	<b>P18-24</b>	<b>P25-34</b>	<b>P35-49</b>	<b>P50-64</b>	<b>P65+</b>	<b>TOTAL PEOPLE</b>
Watching broadcast TV in the home per person across the population <sup>6</sup> (Consolidated to 28 days in Q3 2016)	60:46	35:37	37:02	57:29	91:01	131:53	158:43	90:16
Q3 2015 (Consolidated to 7 days)	64:58	38:22	39:24	61:31	93:12	126:51	155:33	90:42
Watching Live TV	54:42	31:49	32:52	50:59	80:54	119:48	144:40	81:21
Q3 2015	60:02	34:59	35:10	55:35	84:11	116:18	143:57	82:57
Watching Playback to 7 TV <i>(when watched)</i>	4:29	3:04	3:26	5:12	8:24	10:08	12:04	7:22
<i>(what watched)</i> Q3 2015	4:56	3:23	4:14	5:56	9:01	10:33	11:36	7:45
Watching Playback 8-28 TV <i>(when watched)</i>	1:33	0:43	0:44	1:16	1:43	1:56	1:58	1:33
Online time spent per active user <sup>7</sup>	3:21	4:05	68:33	81:04	83:03	81:47	34:08	62:28
Watching video on internet per viewer <sup>8</sup>	14:23	6:35	20:03	19:16	11:24	10:32	5:50	12:46
Watching online video on a smartphone per active online user <sup>9</sup> 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 <sup>9</sup> Q4 2015	n.a.	n.a.	5:35	6:32	3:26	0:43	0:52	3:01



TABLE 4A A MONTH IN THE LIFE - BY QUARTER

<b>KIDS<sup>10</sup></b>	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016
Watching broadcast TV in the home per person across the population <sup>6</sup> :	64:58	59:23			
			57:14	60:18	60:46
Watching Live TV	60:02	54:48	51:15	54:12	54:42
Watching Playback TV to 7 <i>(what watched)</i>	4:56	4:35			
<i>(when watched)</i>			4:28	4:36	4:29
Watching Playback TV 8-28	n.a	n.a			
<i>(when watched)</i>			1:30	1:29	1:33
Online time spent per active user <sup>7</sup>	5:12	4:47			
			3:41	3:21	
					3:11
Watching video on internet per viewer <sup>8</sup>				14:41	14:23

<b>TEENS<sup>11</sup></b>	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016
Watching broadcast TV in the home per person across the population <sup>6</sup> :	38:22	33:46			
			32:00	34:31	35:37
Watching Live TV	34:59	30:43	28:28	30:36	31:49
Watching Playback TV to 7 <i>(what watched)</i>	3:23	3:03			
<i>(when watched)</i>			2:54	3:12	3:04
Watching Playback TV 8-28	n.a	n.a			
<i>(when watched)</i>			0:38	0:43	0:43
Online time spent per active user <sup>7</sup>	8:29	8:45			
			5:53	4:53	
					4:05
Watching video on internet per viewer <sup>8</sup>				4:46	6:35



TABLE 4A A MONTH IN THE LIFE - BY QUARTER

<b>P18 - 24</b>	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016
Watching broadcast TV in the home per person across the population <sup>6</sup> :	39:24	36:06			
			38:12	38:50	37:02
Watching Live TV	35:10	32:22	33:41	33:40	32:52
Watching Playback TV to 7 <i>(what watched)</i>	4:14	3:44			
<i>(when watched)</i>			3:47	4:12	3:26
Watching Playback TV 8-28	n.a	n.a			
<i>(when watched)</i>			0:43	0:57	0:44
Online time spent per person per active user <sup>7</sup>	29:55	25:41			
			52:10	60:27	
					68:33
Watching video on internet per viewer <sup>8</sup>				21:52	20:03
Watching online video on a smartphone per active online user <sup>9</sup> Q4 2015	n.a.	14:11	n.a.	n.a.	n.a.
Watching online video on a tablet per active online user <sup>9</sup> Q4 2015	n.a.	5:35	n.a.	n.a.	n.a.

<b>P25 - 34</b>	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016
Watching broadcast TV in the home per person across the population <sup>6</sup> :	61:31	56:44			
			57:40	58:29	57:29
Watching Live TV	55:35	51:08	50:38	51:08	50:59
Watching Playback TV to 7 <i>(what watched)</i>	5:56	5:36			
<i>(when watched)</i>			5:47	6:00	5:12
Watching Playback TV 8-28	n.a	n.a			
<i>(when watched)</i>			1:14	1:20	1:16
Online time spent per person per active user <sup>7</sup>	37:24	35:16			
			71:09	70:45	
					81:04
Watching video on internet per viewer <sup>8</sup>				18:41	19:16
Watching online video on a smartphone per active online user <sup>9</sup> Q4 2015	n.a.	6:53	n.a.	n.a.	n.a.
Watching online video on a tablet per active online user <sup>9</sup> Q4 2015	n.a.	6:32	n.a.	n.a.	n.a.



TABLE 4A A MONTH IN THE LIFE - BY QUARTER

<b>P35 - 49</b>	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016
Watching broadcast TV in the home per person across the population <sup>6</sup> :	93:12	86:15			
			85:59	91:24	91:01
Watching Live TV	84:11	77:25	75:34	80:13	80:54
Watching Playback TV to 7 <i>(what watched)</i>	9:01	8:46			
<i>(when watched)</i>			8:46	9:22	8:24
Watching Playback TV 8-28	n.a	n.a			
<i>(when watched)</i>			1:38	1:48	1:43
Online time spent per person per active user <sup>7</sup>	39:40	34:27			
			65:46	71:56	
					83:03
Watching video on internet per viewer <sup>8</sup>				11:35	11:24
Watching online video on a smartphone per active online user <sup>9</sup> Q4 2015	n.a.	3:01	n.a.	n.a.	n.a.
Watching online video on a tablet per active online user <sup>9</sup> Q4 2015	n.a.	3:26	n.a.	n.a.	n.a.

<b>P50 - 64</b>	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016
Watching broadcast TV in the home per person across the population <sup>6</sup> :	126:51	120:48			
			124:38	130:28	131:53
Watching Live TV	116:18	111:04	112:16	117:35	119:48
Watching Playback TV to 7 <i>(what watched)</i>	10:33	9:44			
<i>(when watched)</i>			10:31	10:57	10:08
Watching Playback TV 8-28	n.a.	n.a.			
<i>(when watched)</i>			1:50	1:55	1:56
Online time spent per person per active user <sup>7</sup>	42:29	38:01			
			63:39	70:49	
					81:47
Watching video on internet per viewer <sup>8</sup>				10:34	10:32
Watching online video on a smartphone per active online user <sup>9</sup> Q4 2015	n.a.	0:52	n.a.	n.a.	n.a.
Watching online video on a tablet per active online user <sup>9</sup> Q4 2015	n.a.	0:43	n.a.	n.a.	n.a.



TABLE 4A A MONTH IN THE LIFE - BY QUARTER

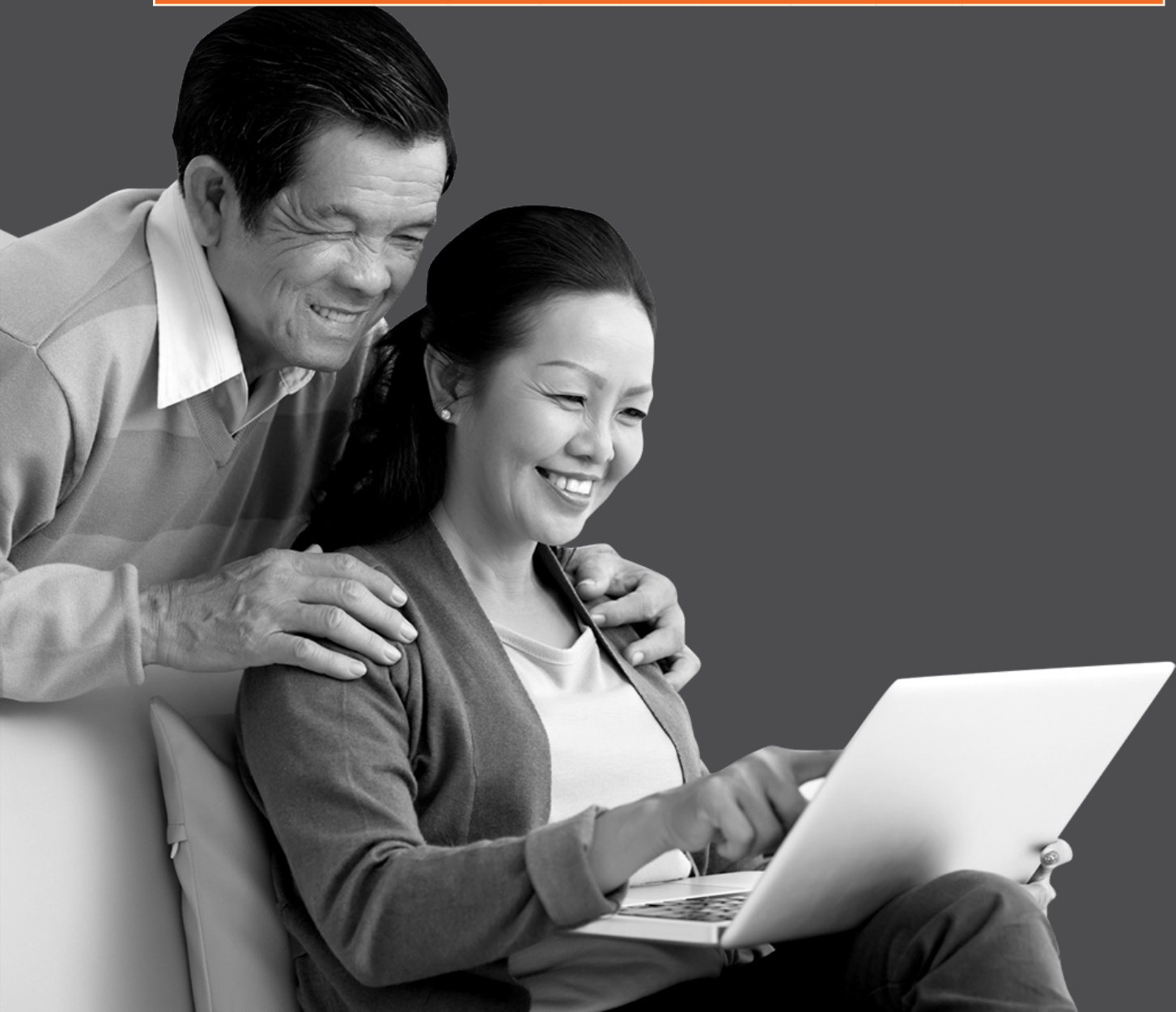
<b>P65+</b>	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016
Watching broadcast TV in the home per person across the population <sup>6</sup> :	155:33	150:51			
			156:04	157:07	158:43
Watching Live TV	143:57	139:33	141:58	142:13	144:40
Watching Playback TV to 7 <i>(what watched)</i>	11:36	11:18			
<i>(when watched)</i>			11:59	12:49	12:04
Watching Playback TV 8-28	n.a	n.a			
<i>(when watched)</i>			2:06	2:04	1:58
Online time spent per person per active user <sup>7</sup>	28:35	27:46			
			29:34	31:32	
					34:08
Watching video on internet per viewer <sup>8</sup>				5:10	5:50
Watching online video on a smartphone per active online user <sup>9</sup> Q4 2015	n.a.	n.a.	n.a.	n.a.	n.a.
Watching online video on a tablet per active online user <sup>9</sup> Q4 2015	n.a.	0:52	n.a.	n.a.	n.a.

<b>TOTAL PEOPLE</b>	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016
Watching broadcast TV in the home per person across the population <sup>6</sup> :	90:42	85:17			
			86:51	90:01	90:16
Watching Live TV	82:57	77:57	77:44	80:22	81:21
Watching Playback TV to 7 <i>(what watched)</i>	7:45	7:20			
<i>(when watched)</i>			7:36	8:03	7:22
Watching Playback TV 8-28	n.a	n.a			
<i>(when watched)</i>			1:31	1:36	1:33
Online time spent per person per active user <sup>7</sup>	34:44	31:12			
			50:30	54:44	
					62:28
Watching video on internet per viewer <sup>8</sup>				12:48	12:46
Watching online video on a smartphone per active online user <sup>9</sup> Q4 2015	n.a.	4:18	n.a.	n.a.	n.a.
Watching online video on a tablet per active online user <sup>9</sup> Q4 2015	n.a.	3:01	n.a.	n.a.	n.a.



TABLE 05 VIDEO AUDIENCE COMPOSITION (BY AGE AND GENDER)

Q3 2016	KIDS <sup>10</sup>	TEENS <sup>11</sup>	P18-24	P25-34	P35-49	P50-64	P65+	FEMALES	MALES
On broadcast TV <sup>6</sup> (Consolidated to 28 days in Q3 2016)	11%	2%	4%	9%	20%	26%	27%	53%	47%
Q3 2015 (Consolidated to 7 days)	12%	3%	4%	10%	21%	25%	25%	53%	47%
On internet <sup>8</sup>	4%	3%	10%	18%	29%	24%	13%	47%	53%
Q3 2015	4%	5%	10%	17%	29%	23%	12%	50%	50%



## FOOTNOTES

1 The market level total time and audience for Nielsen Online Ratings – Hybrid Streaming were progressively understated between January 2015 and June 2016. This was due to the Nielsen meter not capturing all instances of tags from panellists watching YouTube and Vevo videos on updated versions of browsers. This was corrected as of July 2016 data. As a result, historical comparisons should not be used.

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

2 Nielsen Digital Ratings Monthly (DRM). As of August 2016 DRM data, a recent metering and crediting enhancement now enables improved reporting of mobile use on Android devices. This involves removing a legacy crediting rule globally that capped use at 30 minutes. This legacy crediting rule was designed to prevent attributing a gap in measurement as a long duration event. Also known as the "30 minute cap" rule, this limits the amount of use reported for extensive periods of mobile activity. Nielsen has now aligned the duration crediting rules for Android to that of iOS. As a result, all duration related metrics across both web and app have shown an increase from August 2016. This has no impact on Hybrid Streaming data. 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.

3 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.

4 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. Internet connection and tablet penetration based on rolling four-quarter averages to stabilise month-to-month trends. Estimate for internet capable TV in home refers to the capability to be internet connected, whether connected or not.

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

6 Source: Combined OzTAM Metro and Regional TAM databases with overlap homes de-duplicated. Average time spent viewing (ATV 0200-2600) across the population within metered markets, within metered markets. Includes free-to-air and subscription television viewing. Playback 'when watched' TV for Q1-Q3 2016; playback 'what watched' in Q4 2015. 'When watched' illustrates the impact of viewing at the time it actually takes place; for details please see Appendix or note on page 4. '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 seven days (or 28 days, as noted) after the original broadcast. Consolidated 28 data was introduced in January 2016 and is 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.

7 Source: Nielsen Online Ratings up to and including Q4 2015 – Hybrid Surfing. Estimate is the average of the three 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. Q1 2016 data is for February-March 2016 only. Figures are per active user. DRM for tablet and smartphones is P18+ only. As of August 2016 DRM data, a recent metering and crediting enhancement now enables improved reporting of mobile use on Android devices. This involves removing a legacy crediting rule globally that capped use at 30 minutes. This legacy crediting rule was designed to prevent attributing a gap in measurement as a long duration event. Also known as the "30 minute cap" rule, this limits the amount of use reported for extensive periods of mobile activity. Nielsen has now aligned the duration crediting rules for Android to that of iOS. As a result, all duration related metrics across both web and app have shown an increase from August 2016. This has no impact on Hybrid Streaming data. 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.

8 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 were progressively understated between January 2015 and June 2016. This was due to the Nielsen meter not capturing all instances of tags from panelists watching YouTube videos and VEVO videos on updated versions of browsers. This was corrected as of July 2016 data in Nielsen Online Ratings - Hybrid Streaming. As a result 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 Q3 2015 - Q1 2016. At no time in this period were there any issues or trend breaks in OzTAM or Regional TAM TV data.

9 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). 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). Monthly estimate based on self-reported weekly time spent multiplied by average number of weeks in a month. Figure relates to online video only.

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

11 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.

## APPENDIX

In the spirit of continual improvement and efforts to incorporate the best available data and insights from OzTAM, Regional TAM and Nielsen, the Q3 2016 issue of the Australian Multi-Screen Report retains and builds on a number of enhancements introduced in Q2 2016 and earlier quarters.

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
<b>Consolidated 28 viewing data</b>	Q1 – Q3 2016	Broadcast TV material watched live or played back <i>through the TV set</i> within 28 days.	Illustrates growth in 'longer-tail' viewing through TV sets.	<ul style="list-style-type: none"> <li>Broadcast TV viewing on in-home TV sets (p. 8)</li> <li>Video viewing, average time spent per month (p. 9-10)</li> <li>A month in the life (p. 12)</li> <li>Total use of the TV set (p. 13-15)</li> <li>Tables 2, 4, 4a, 5</li> </ul>
<b>'When watched' viewing data</b>	Q1 2016 onwards	Reports playback within 28 days viewing through TV sets <i>at the time it actually occurs</i> .	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"> <li>All references to watching TV in the home, unless noted otherwise as 'what watched'.</li> </ul>
<b>'Per person' online data and 'per viewer' TV data</b>	Q2 & Q3 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 rather than per active user, and appear alongside the active universe data.</p> <p>Average time spent viewing TV in the Multi-Screen Report has always been projected to the entire population within OzTAM and Regional TAM markets ('the population'). Since Q2 2016 time spent viewing TV figures have been recalculated to include per viewer figures. These two estimates appear alongside one another in the graphic, 'Video viewing, average time spent per month.' Tables 1-5 in the report continue to use 'per population' TV viewing data.</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 Nielsen Online Ratings (NOR) 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"> <li>Video viewing, average time spent per month (p. 10)</li> </ul>



Element	Time period	Specifics	Rationale	Appears in
<b>Nielsen Online Ratings (NOR) - Hybrid Streaming data: correction</b>	Q1 2015 - Q2 2016	Corrects progressive understatement of market level total time and audience for NOR from January 2015 - June 2016.	<p>From January 2015 – June 2016 the Nielsen meter did not capture all instances of tags from panellists watching YouTube and VEVO videos on updated versions of browsers. This was corrected as of July 2016 data in Nielsen Online Ratings - Hybrid Streaming.</p> <p>In addition, Facebook changed the way that it serves video in December 2015. Nielsen is investigating the way these streams are served to best measure them, however streams for Facebook within NOR are overstated at this time. No other metrics for Facebook are affected and this impacts December 2015 to current data.</p>	<ul style="list-style-type: none"> <li>• Video viewing, average time spent per month (p. 10)</li> <li>• A month in the life (p. 12)</li> <li>• Tables 2, 4, 4a, 5</li> </ul>



## GUIDELINES FOR COMPARING Q3 2016 DATA WITH EARLIER PERIODS

Element	Time period	OK to compare Q3 2016 with earlier periods?	Reason why/not and (if applicable) an example	Appears in
<b>Consolidated 28 viewing data</b>	Q1 – Q3 2016	Yes, so long as the respective playback bases are made clear and applicable differences are highlighted.	Consolidated 28 data was not available in the OzTAM and Regional TAM databases before Q1 2016. Example: “Q3 2016 includes playback to 28; Q3 2015 includes playback to 7 only.”	<ul style="list-style-type: none"> <li>Broadcast TV viewing on in-home TV sets (p. 8)</li> <li>Video viewing, average time spent per month (p. 9-10)</li> <li>A month in the life (p. 12)</li> <li>Total use of the TV set (p. 13-15)</li> <li>Tables 2, 4, 4a, 5</li> </ul>
<b>‘When watched’ viewing data</b>	<p>Q1 2015 - Q1 2016, appear in total TV screen use only.</p> <p>Q2 2016 also in average time spent viewing/ month.</p> <p>From Q3 2016, ‘when watched’ data is used throughout the report.</p>	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 7 and Consolidated 28 viewing databases).	<ul style="list-style-type: none"> <li>While ‘when watched’ appears throughout the Q3 2016 ‘time spent watching TV in the home’ figures, earlier reports used a combination of ‘when watched’ and ‘what watched’ data. Please take care to compare like with like.</li> </ul>
<b>‘Per person’ online data and ‘per viewer’ TV data</b>	Q2 & Q3 2016	No.	<p>Online numbers in previous quarters were per active user, rather than the population as a whole, and have also been restated in Q2 2016 to per person.</p> <p>Average time spent viewing TV in the Multi-Screen Report has always been projected to the entire population within OzTAM and Regional TAM markets (‘the population’). Since Q2 2016 time spent viewing TV figures have been recalculated to include per viewer figures. These two estimates appear alongside one another in the graphic, ‘Video viewing, average time spent per month.’ Tables 1-5 in the report continue to use ‘per population’ TV viewing data.</p>	<ul style="list-style-type: none"> <li>Video viewing, average time spent per month (p. 9-10)</li> </ul>
<b>Nielsen Online Ratings (NOR) - Hybrid Streaming data: correction</b>	Q1 2015 - Q2 2016	No.	<p>Errors in the Nielsen data from January 2015 – June 2016 (described above) mean historical NOR data cannot be used.</p> <p>Because the NOR error distorted the proportions in earlier edition “Average time spent viewing video per month” graphics, historical proportions were incorrect and may not be referenced.</p> <p><b>At no time in this period were there any errors or trend breaks in OzTAM or Regional TAM TV data.</b></p>	<ul style="list-style-type: none"> <li>Video viewing, average time spent per month (p. 9-10)</li> <li>A month in the life (p. 12)</li> <li>Tables 2, 4, 4a, 5</li> </ul>

# 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 2-4, 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, at the time it is actually viewed ('when watched' TV) for Q1-Q3 2016 and 'what watched' 'what watched' (or, OzTAM and Regional TAM and Regional TAM time shift viewing figures in the Consolidated viewing database, which remain the data that clients access via analytical software) for Q3-Q4 2015.
- 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 activities such as gaming, viewing TV network streaming services, online activity on the TV screen, watching DVDs and playing back TV content beyond 28 days from original broadcast.
- Average time spent viewing (ATV) is calculated as the daily average time (0200-2600) within the OzTAM and Regional TAM coverage area 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 1-minute 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 is not available.
- Smartphone ownership and use 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 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).
- As of August 2016 Nielsen Digital Ratings Monthly (DRM) data, a recent metering and crediting enhancement now enables improved reporting of mobile usage on Android devices. This involves removing a legacy crediting rule globally

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# Explanatory Notes

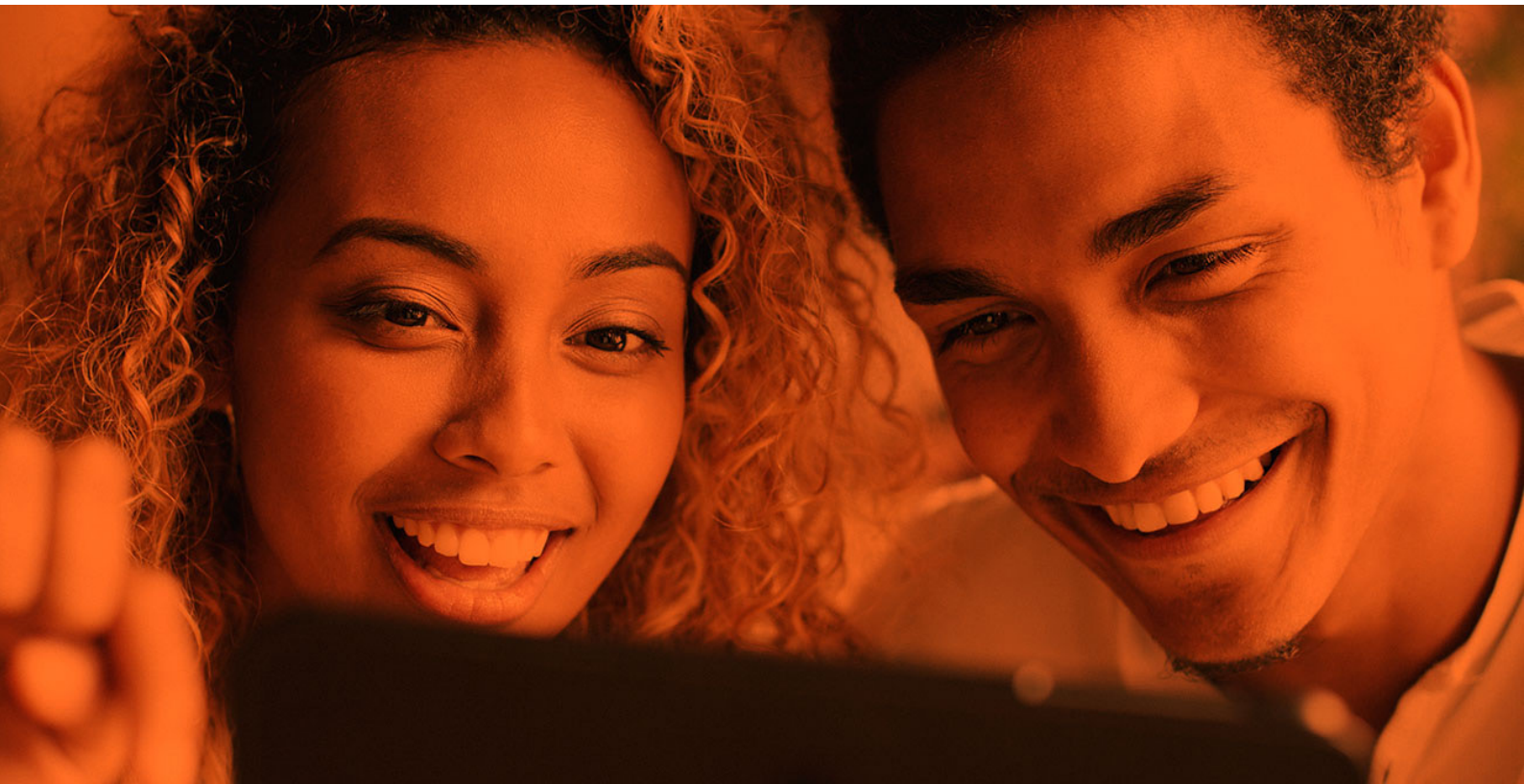
that capped use at 30 minutes. This legacy crediting rule was designed to prevent attributing a gap in measurement as a long duration event. Also known as the "30 minute cap" rule, this limits the amount of use reported for extensive periods of mobile activity. Nielsen has now aligned the duration crediting rules for Android to that of iOS. As a result, all duration related metrics across both web and app have shown an increase from August 2016. This has no impact on Hybrid Streaming data. 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.

- 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.

- The market level total time and audience for Nielsen Online Ratings – Hybrid Streaming was understated between January 2015 and June 2016. This was due to the Nielsen meter not capturing all instances of tags from panelists watching YouTube and Vevo videos on updated versions of browsers. This was corrected as of July 2016 data. As a result, historical comparisons should not be used. At no time in this period were there any issues or trend breaks in OzTAM or Regional TAM TV data.





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

### **TONY HOGARTH**

Regional TAM Chairperson  
tony.hogarth@prime7.com.au

## NIELSEN

### **CRAIG JOHNSON**

Managing Director, Media, Nielsen  
cr.johnson@nielsen.com



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