

AUSTRALIAN MULTI-SCREEN REPORT

QUARTER 4 2012



TRENDS IN VIDEO VIEWERSHIP BEYOND CONVENTIONAL TELEVISION SETS

VIDEO CONTENT ACROSS MULTIPLE SCREENS

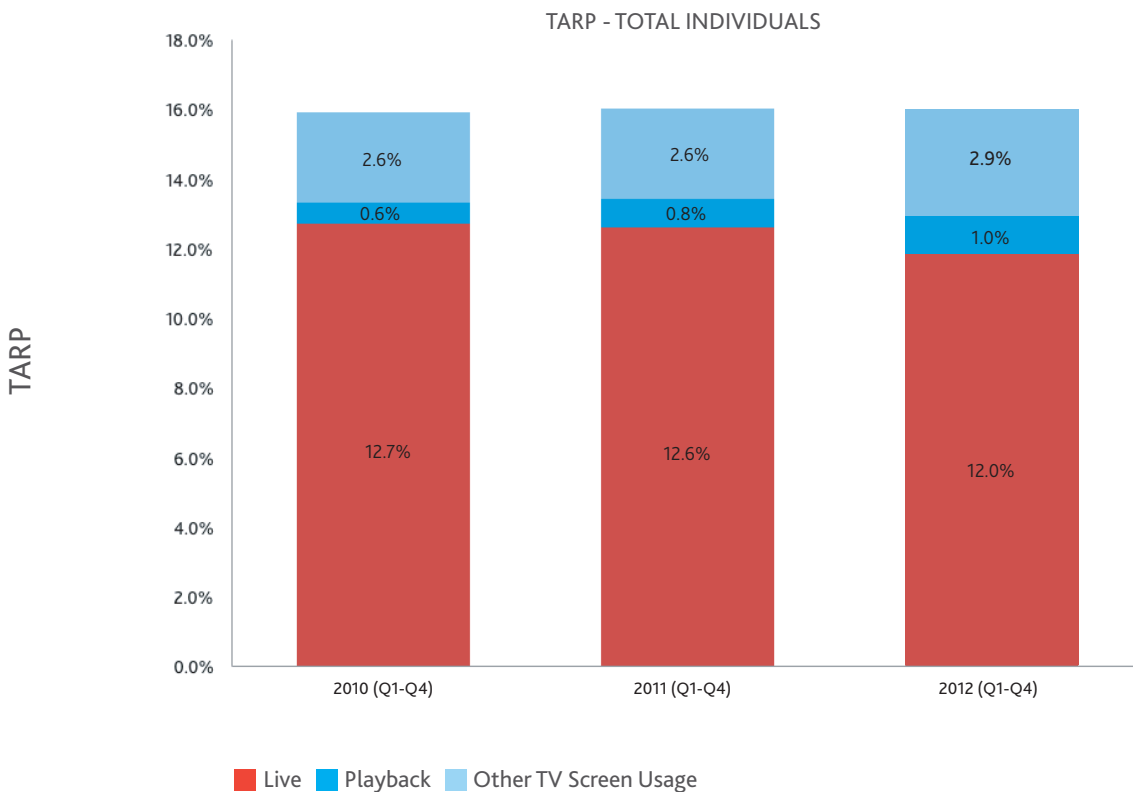
This report presents the trends and patterns of video viewership in Australian homes across televisions, computers, tablets and mobile smartphones by combining data from the OzTAM ratings panels, Regional TAM ratings panels, Nielsen Online Ratings, Nielsen Online Consumer Report, Nielsen Consumer & Media View and Nielsen VideoCensus.

In the Q4 2012 edition of the Australian Multi-Screen report, we look at a unique study on tablet usage, as well as VideoCensus – the new methodology for measuring online video engagement.

TOTAL TV SCREEN USAGE

Continuing the trend evident in the Q3 2012 Multi-Screen report, overall use of the traditional television screen as measured by TARPs (the average viewing audience for a demographic expressed as a percentage of the estimated potential audience of that demographic) is steady.

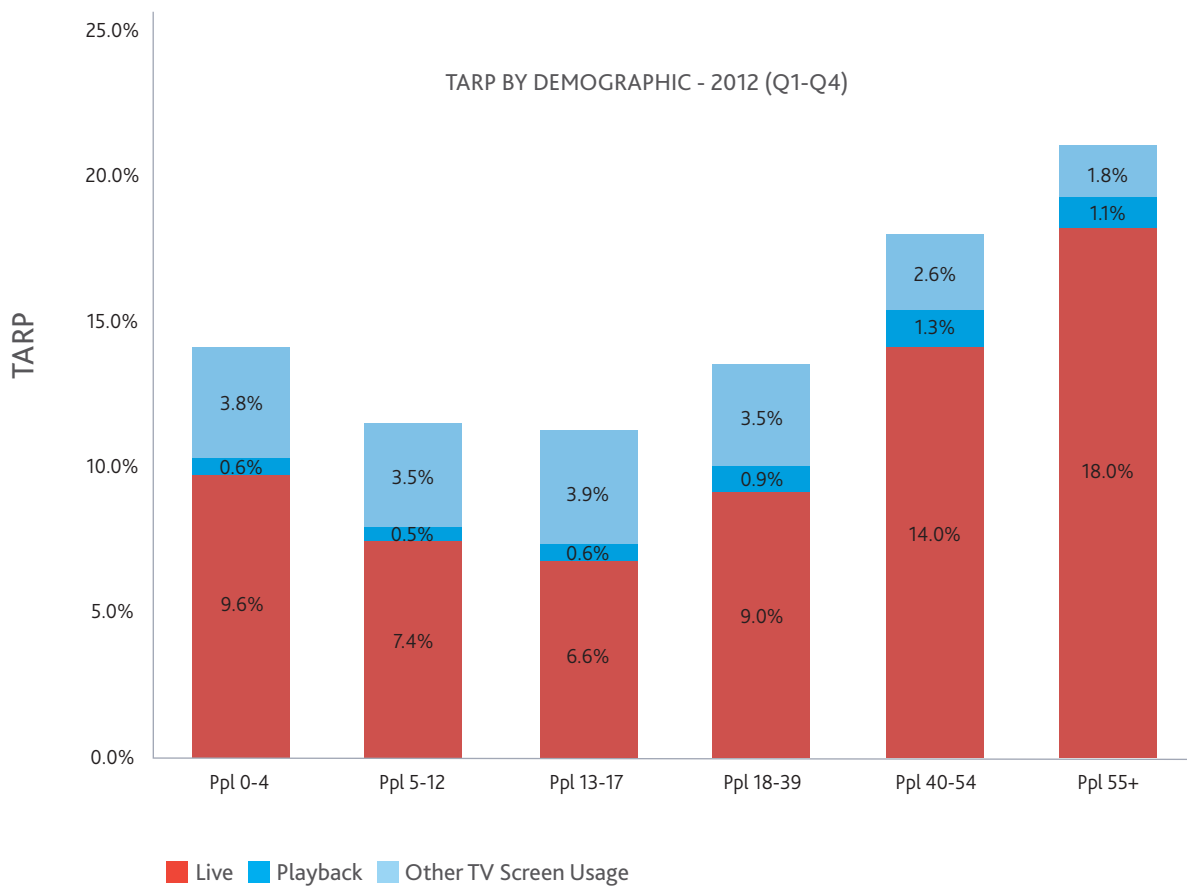
OTHER TV SCREEN USAGE



Source: OzTAM and Regional TAM databases with overlap homes de-duplicated

Home television technology has continued to evolve. With analogue television broadcasts ceasing by the end of this year, 81% of homes are now able to receive digital broadcasts on all their televisions. More than half of all homes now have PVRs and around one in five homes have TV capable of connecting to the internet.

OTHER TV SCREEN USAGE



Source: OzTAM and Regional TAM databases with overlap homes de-duplicated



VIDEOCENSUS

WHAT IS VIDEOCENSUS AND WHAT DOES IT MEAN FOR THIS REPORT?

VideoCensus is an Audience Measurement Ratings service that specifically captures audience engagement with video content. The previous quarterly releases of the multi-screen reports included online video engagement on PC/Laptop estimates calculated using a different methodology. Quarter 4 2012 figures are sourced from Nielsen VideoCensus, which will continue to be the source going forward.

VideoCensus employs a hybrid methodology (using tagged and panel data) consistent with the current IAB endorsed Nielsen Online Ratings, whereby panel data and 'tagged' video data (both digitally measured) are used for holistic reporting. Previous online video figures for PC/Laptop detailed in this report were sourced via custom analysis of the panel streaming data, whereas VideoCensus is a more accurate and complete view of engagement; specifically with video content online via panel and tagged data. Due to the difference in methodology, comparisons to previous quarters should be avoided.

Launched in November 2012, VideoCensus includes rankings of the most popular Brands for Australians streaming videos, audience size and reach, stream volumes, time spent and visits per person.

VideoCensus also offers rankings overall and by category, detailed demographic analysis of Video Brands and Channels as well as duplication analysis, trending and day-part analysis.

Analysis of the most recent Nielsen VideoCensus figures shows that the average monthly time spent by Australians in Q4 watching video on PC/Laptops is just under six hours (5 hours 54 mins) with over 11.1 million people engaging in this activity each month.

Demographic analysis shows that the video audience is equally composed of males and females, each holding 50 percent share – however males are much more engaged as evidenced by their time spent (males: 6 hours 55 mins, females: 4 hours 55 mins)¹. Likewise, younger consumers spent more time watching video on PC/Laptops than their older counterparts. Those aged under 35 years old exceed the national average of online video consumption with video viewing reaching its peak of 11 hours and 36 mins amongst 18-24 year olds – almost twice as high as the national average (5 hours and 54 mins).



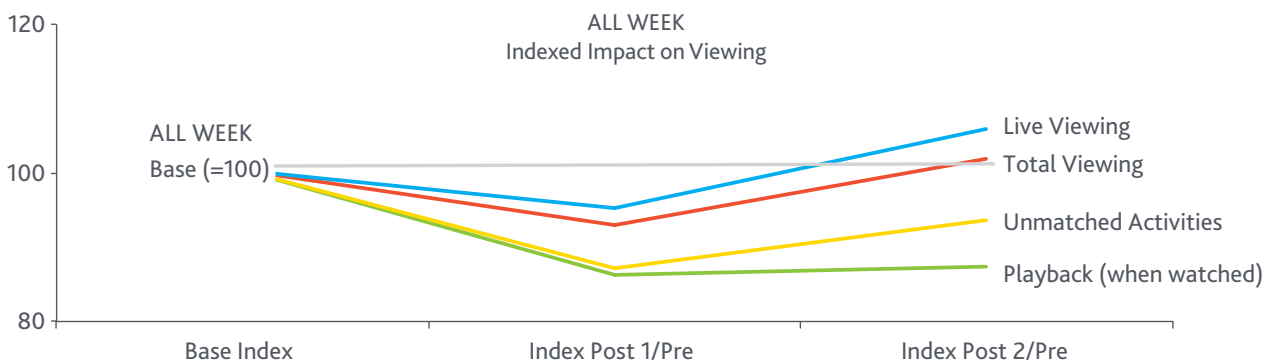
¹ Nielsen VideoCensus (Q4 2012). Using Internet on PC excludes adult content and applications. Estimate is the average of November and December 2012. Figures are National and for people 2+. Home and Work panel only.

SPECIAL STUDY: TABLET USAGE AND BEHAVIOUR WITHIN THE HOME

In Q4 2012 Nielsen, OzTAM and RegionalTAM undertook a first-of-its-kind 12 week study to further develop an understanding of the impact of tablets on claimed and actual total TV screen usage. Thirty (30) households separate to the TAM services within metropolitan and regional television markets were provided with an iPad+ tablet. Actual television use within these thirty study homes was measured pre and post introduction of the tablet via people meters and was supported by three surveys. The surveys captured claimed television and claimed tablet usage, with one deployed before the tablet was provided and then two after the introduction of the tablet, at four weekly intervals.

Analysis of average daily minutes (ATV) of total TV screen usage for all individuals in the tablet households and a corresponding control group of households was conducted over three consecutive four-week periods (one pre and two post the introduction of the tablets). The analysis was broken down into Total Viewing, Live Viewing, Playback^ and Unmatched Activities#. Across the four weeks, the results showed that post an initial exploratory period, total TV screen usage behaviour in tablet households returned to normal and in some cases resulted in slightly higher indexed levels of viewing intensity. Playback^ and Unmatched Activities# were slightly slower to recover, but there were no long term effects on total TV screen usage.

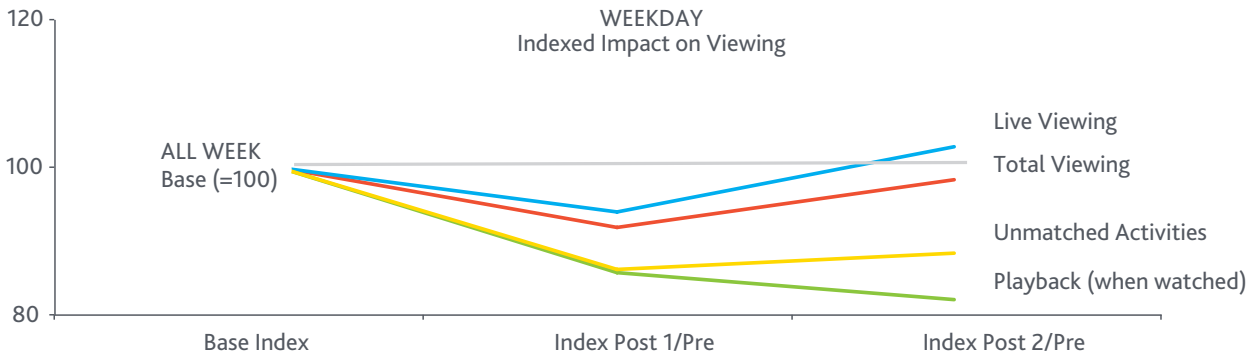
IMPACT OF TABLET ON TOTAL TV SCREEN USE



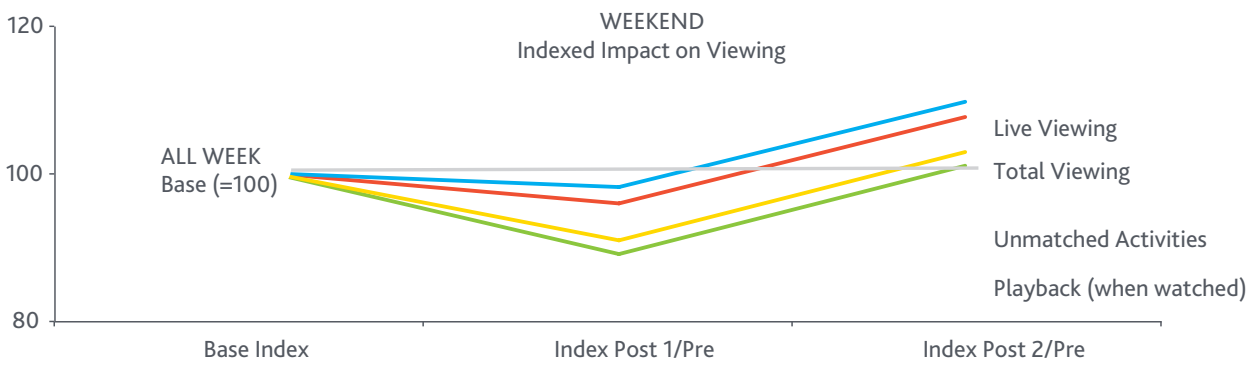
Source: OzTAM and Regional TAM Tablet Study homes

Live Viewing is the least affected and remains the strongest total TV usage segment post the introduction of the tablets on weekdays and weekends. There is some evidence of possible displacement of other Unmatched Activities# and Playback^ on weekdays compared to weekends. Both activities show strong recovery with slightly higher indexed levels of viewing intensity on weekends across all segments relative to the control group of households.

SPECIAL STUDY: TABLET USAGE AND BEHAVIOUR WITHIN THE HOME



Source: OzTAM and Regional TAM Tablet Study homes

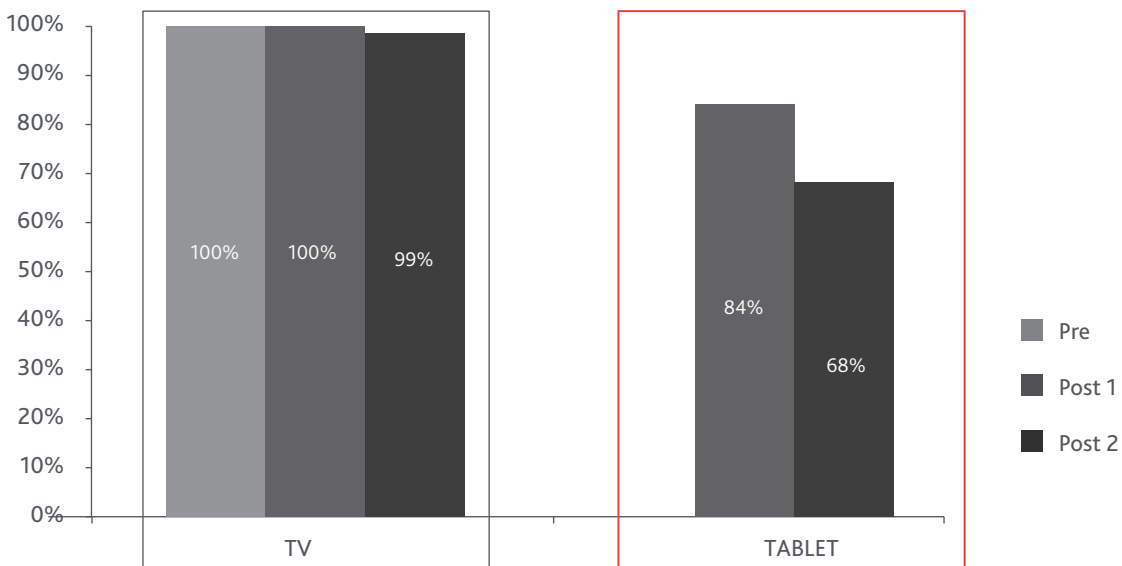


Source: OzTAM and Regional TAM Tablet Study homes

Claimed total TV screen usage supported the patterns in actual behavior, with total TV set usage remaining steady pre and post the introduction of tablets in households. Over time, tablet usage is concentrated, particularly in households with children, with fewer household members claiming to use the device.

TV SET AND TABLET USAGE

CLAIMED TV SET AND TABLET USAGE



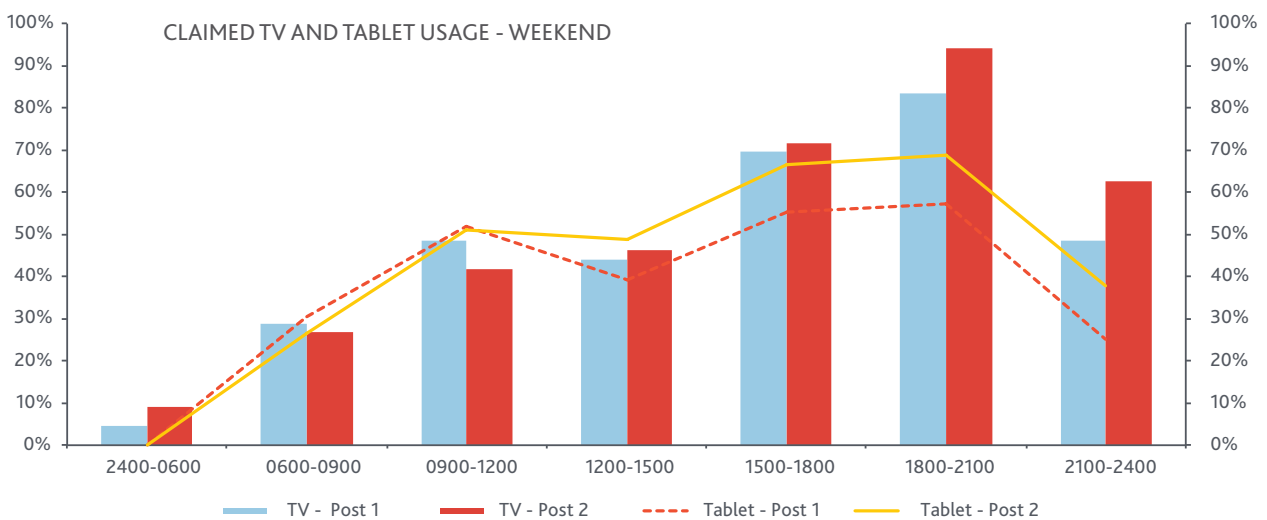
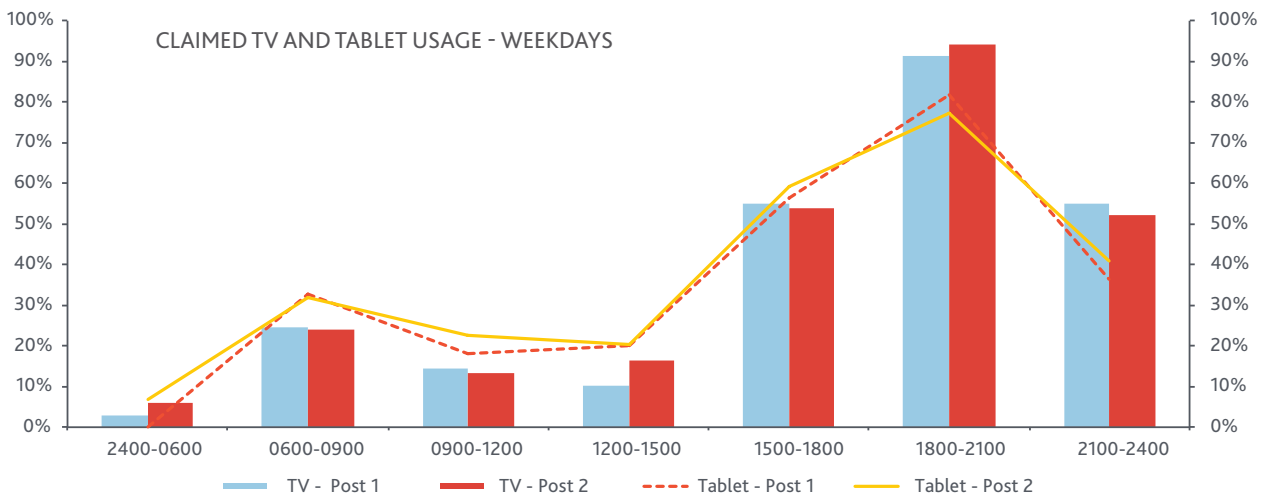
SPECIAL STUDY: TABLET USAGE AND BEHAVIOUR WITHIN THE HOME

The results highlight how tablets are complementary to TV, rather than substituting TV. On weekdays and weekends tablet usage tends to closely mirror TV across the day.

COMPUTER DEVICES AND TABLET USAGE

For other computing devices, the people in the study gave reasons such as portability, convenience and ease of use for transferring some activities such as web surfing and emailing from laptops, netbooks, desktop computers and smartphones.

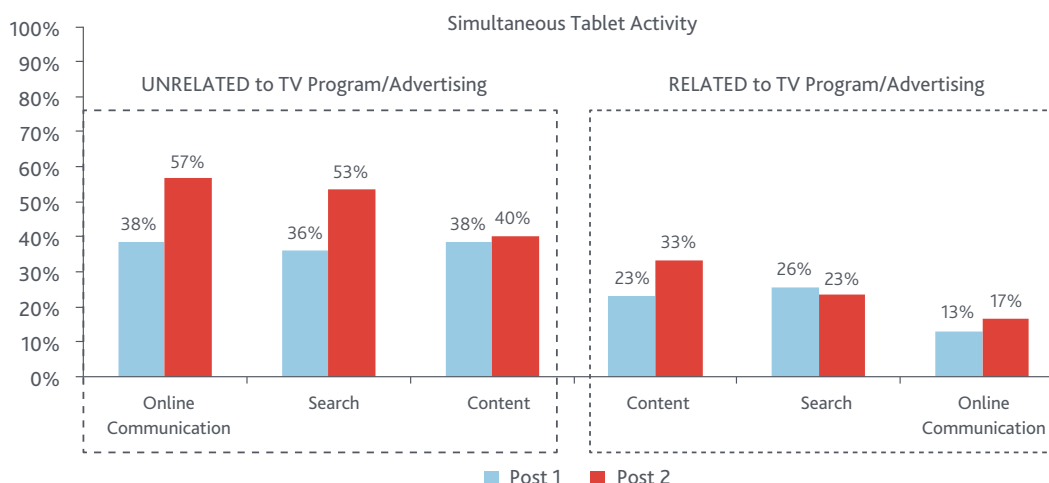
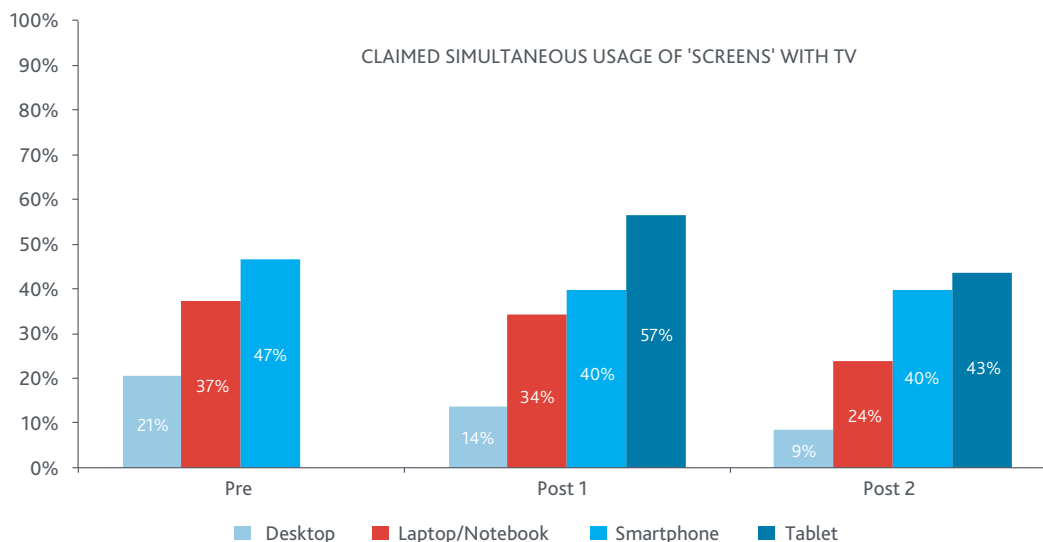
TV AND TABLET OPPORTUNITY TO USE



The study also investigated popularity of screens for simultaneous usage with TV. Among the households who were given tablets, tablets were the most likely 'screen' to be used simultaneously with TV (above Desktops and Laptops/Notebooks and Smartphones) and were predominantly used for activities *unrelated* to the TV program or TV advertising being watched, i.e. reading messages or communicating with others in general (57%), searching/browsing products and services (53%) and accessing other entertainment content (40%).

SPECIAL STUDY: TABLET USAGE AND BEHAVIOUR WITHIN THE HOME

SIMULTANEOUS TV AND TABLET USAGE



Based on initial observations, the incidence of watching television programs broadcast on free-to-air or pay TV networks on the tablet is very small with only 2 percent of individuals in tablet households claiming to ever do so. Viewing of 'other' video on the tablet is significantly higher in comparison at 27 percent. Accessing the Internet and playing games are the two most prominent activities with 73 percent and 59 percent of tablet users claiming to do so respectively.

While people may have access to multiple screens for watching TV programs, the television set continues to remain the preferred and primary device. One-hundred percent (100%) of people in the tablet study households continued to express that television was their preferred TV program viewing 'screen' both pre and post the introduction of the tablet and other 'screens' available to them. Screen size, picture and sound quality, ability to sit back and relax and watch with other household members were key reasons given. Other 'screens', including the tablet were used on occasion when and if a program was missed on TV, primarily for reasons of convenience and portability.

*iPad 2 16GB Wi-Fi and 3G

^Playback – when watched

#Unmatched Activities (predominantly includes gaming / viewing non-broadcast video, or broadcast content beyond the 7 day consolidated viewing window. Also includes mute (no audio) and data cast channels

KEY OBSERVATIONS

TABLE 1: TECHNOLOGY PENETRATION

| | Q4 2011 | Q1 2012 | Q2 2012 | Q3 2012 | Q4 2012 |
|--|---------|---------|---------|---------|---------|
| Digital terrestrial television (DTT): Penetration within TV households ² | 95% | 96% | 97% | 97% | 98% |
| Completely DTT: Penetration within TV households (Homes capable of receiving DTT on each working TV within the home) | 70% | 74% | 77% | 79% | 81% |
| Personal video recorder (PVR): Penetration within TV households | 44% | 47% | 49% | 50% | 52% |
| Internet Connection: Household penetration ³ | 77% | 78% | 78% | 78% | 79% |
| Tablets: Household penetration | N.A. | 15% | 19% | 22% | 27% |
| Internet Connected TV in Home | N.A. | 15% | 16% | 18% | 20% |
| Smartphones: People 16+ ⁴ | 45% | 48% | 52% | 56% | 59% |

TABLE 2: MONTHLY TIME SPENT (HH:MM)

| | Q4 2011 | Q1 2012 | Q2 2012 | Q3 2012 | Q4 2012 |
|--|---------|---------|---------|---------|---------|
| Watching TV in the home ⁵ | 94:24 | 97:15 | 99:09 | 99:54 | 91:05 |
| Watching Playback TV | 5:58 | 6:33 | 7:13 | 6:46 | 6:30 |
| Using Internet on a PC ⁶ | 43:54 | 44:06 | 47:24 | 48:00 | 50:42 |
| Watch video on PC/Laptop | 3:27 | 3:15 | 3:58 | 3:54 | - |
| Watch video on PC/Laptop (Video Census) ⁷ | - | - | - | - | 5:54 |
| Watching video on a mobile phone ⁸ | 1:20 | N.A. | N.A. | N.A. | N.A. |

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

| | Q4 2011 | Q1 2012 | Q2 2012 | Q3 2012 | Q4 2012 |
|---|---------|---------|---------|---------|---------|
| Watching TV in the home ⁹ | 21,433 | 21,682 | 21,683 | 21,682 | 21,653 |
| Watching Playback TV | 9,021 | 9,357 | 9,631 | 9,706 | 9,646 |
| Using Internet on a PC ¹⁰ | 13,692 | 13,480 | 13,116 | 12,874 | 14,703 |
| Watch video on PC/Laptop | 9,892 | 10,015 | 9,897 | 9,947 | - |
| Watch video on PC/Laptop (Video Census) ¹¹ | - | - | - | - | 11,103 |
| Owning/using a mobile phone ¹² | 17,431 | 17,351 | 17,442 | 17,445 | 17,365 |
| Streaming video on mobile phone ¹³ | 1,991 | N.A. | N.A. | N.A. | N.A. |

² 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.

³ Source: Estimates for Internet connection and Tablet household penetration from combined OzTAM Metro and Regional TAM quarterly Establishment Surveys (ES).

⁴ Sources: Nielsen Australian Online Consumer (AOC) Report of online consumers aged 16+ (Q1 2011), The Nielsen Telstra Smartphone Index Report of mobile users aged 16+ Q2 2011 and Q3 2011 and Nielsen Consumer & Media View national population aged 16+ (Q4 2011 onwards)

⁵ 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. Please note television viewing is seasonal, with people watching more television in the winter months and with the end of daylight saving time

⁶ Source: Nielsen NetView (Q1-Q3 2011) and Nielsen Online Ratings (Q4 2011 onwards). Using Internet on PC excludes adult content and applications. Estimate is the average of the 3 months within the calendar quarter. Figures are National and for people 2+. Home and Work panel only. Due to a change in methodology comparisons prior to Q4 2011 cannot be made.

⁷ Source: Nielsen VideoCensus (Q4 2012). Using Internet on PC excludes adult content and applications. Estimate is the average of November and December 2012. 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.

⁸ Smartphone usage source: Nielsen Australian Online Consumer (AOC) Report for respondents aged 16 years and over. Estimate based on reported weekly time spent by average number of weeks in a month (4.3). National figure only produced annually. Q1 figure from 2010-2011 AOC Report (February 2011 edition). Q4 figure from 2011-2012 AOC Report (February 2012 edition).

⁹ 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).

¹⁰ Source: Nielsen NetView (Q1-Q3 2011) and Nielsen Online Ratings (Q4 2011 onwards) – Internet activity (using and watching) excludes adult content and application. National figures for people 2+.

¹¹ Source: Nielsen VideoCensus (Q4 2012). Using Internet on PC excludes adult content and applications. Estimate is the average of November and December 2012. 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.

¹² Mobile phone ownership and usage sourced from Nielsen Consumer & Media View (people aged 14+).

¹³ Nielsen Australian Online Consumer (AOC) Report – audience profile is based users aged 16+ in Australia. National figures only produced annually. Figure from 2010-11 AOC Report (February 2012 edition). National population estimate for people aged 16+ is 18,336,000. National estimate of the online active audience aged 16+ from Nielsen Online Ratings (December 2011) is 14,223,000.

TABLE 4: A MONTH IN THE LIFE – Q4 2012

| | KIDS ¹⁴ | TEENS ¹⁵ | P18-24 | P25-34 | P35-49 | P50-64 | P65+ | ALL PEOPLE ¹⁶ |
|---|--------------------|---------------------|--------|--------|--------|--------|--------|--------------------------|
| Watching TV in the home ¹⁷ | 62:55 | 51:14 | 44:08 | 73:31 | 97:19 | 121:22 | 146:36 | 91:05 |
| Q4 2011 | 65:58 | 53:02 | 49:05 | 79:28 | 99:23 | 124:54 | 149:23 | 94:24 |
| Watching Playback TV | 3:55 | 4:22 | 3:59 | 5:59 | 8:21 | 8:22 | 7:42 | 6:30 |
| Q4 2011 | 3:20 | 3:59 | 4:34 | 5:53 | 7:28 | 7:46 | 6:29 | 5:58 |
| Using the Internet on a PC ¹⁸ | 8:35 | 19:08 | 41:17 | 61:55 | 59:23 | 59:01 | 35:50 | 50:42 |
| Q4 2011 | 7:47 | 14:31 | 28:54 | 62:39 | 54:25 | 50:53 | 31:36 | 43:54 |
| Watch video on Internet ¹⁹ | 4:52 | 6:40 | 11:36 | 8:19 | 5:01 | 3:21 | 1:48 | 5:54 |
| Watching video on a mobile phone ²⁰ (Q4 2011) | N.A. | 1:29 | 2:54 | 2:55 | 0:57 | 0:18 | 0:00 | 1:20 |

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

| KIDS | Q4 2011 | Q1 2012 | Q2 2012 | Q3 2012 | Q4 2012 |
|--|---------|---------|---------|---------|---------|
| Watching TV in the home ¹⁷ | 65:58 | 64:54 | 68:30 | 70:10 | 62:55 |
| Watching Playback TV | 3:20 | 3:29 | 3:55 | 4:06 | 3:55 |
| Using the Internet on a PC ¹⁸ | 7:47 | 7:30 | 7:34 | 8:12 | 8:35 |
| Watching video on PC/Laptop | 1:39 | 1:53 | 2:10 | 2:19 | - |
| Watching video on Internet (Video Census) ¹⁹ | - | - | - | - | 4:52 |
| Watching video on a mobile phone ²⁰ (Q4 2011) | N.A. | N.A. | N.A. | N.A. | N.A. |

| TEENS | Q4 2011 | Q1 2012 | Q2 2012 | Q3 2012 | Q4 2012 |
|--|---------|---------|---------|---------|---------|
| Watching TV in the home ¹⁷ | 53:02 | 51:59 | 55:53 | 58:21 | 51:14 |
| Watching Playback TV | 3:59 | 3:56 | 4:25 | 4:15 | 4:22 |
| Using the Internet on a PC ¹⁸ | 14:31 | 13:39 | 13:57 | 16:42 | 19:08 |
| Watching video on PC/Laptop | 2:53 | 2:29 | 3:19 | 3:12 | - |
| Watching video on Internet (Video Census) ¹⁹ | - | - | - | - | 6:40 |
| Watching video on a mobile phone ²⁰ (Q4 2011) | 1:29 | 1:29 | 1:29 | 1:29 | 1:29 |

| P18-24 | Q4 2011 | Q1 2012 | Q2 2012 | Q3 2012 | Q4 2012 |
|--|---------|---------|---------|---------|---------|
| Watching TV in the home ¹⁷ | 49:05 | 51:54 | 50:53 | 49:55 | 44:08 |
| Watching Playback TV ²⁰ | 4:34 | 5:04 | 4:53 | 4:22 | 3:59 |
| Using the Internet on a PC ¹⁸ | 28:54 | 29:02 | 35:45 | 38:34 | 41:17 |
| Watching video on PC/Laptop | 5:00 | 3:57 | 6:25 | 6:05 | - |
| Watching video on Internet (Video Census) ¹⁹ | - | - | - | - | 11:36 |
| Watching video on a mobile phone ²⁰ (Q4 2011) | 2:54 | 2:54 | 2:54 | 2:54 | 2:54 |

¹⁴ Combined Metro OzTAM and Regional TAM data defines 'Kids' aged 0-12 and Nielsen Netview aged 2-11.

¹⁵ Combined Metro OzTAM and Regional TAM data defines 'Teens' aged 13-17, Nielsen Netview aged 12-17 and Nielsen AOC aged 16-17.

¹⁶ Mobile phone population based on people aged 16+.

¹⁷ 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).

¹⁸ Source: Nielsen NetView (Q1-Q3 2011) and Nielsen Online Ratings (Q4 2011 onwards). Using Internet on PC excludes adult content and applications. Estimate is the average of the 3 months within the calendar quarter. Figures are National and for people 2+. Home and Work panel only. Due to a change in methodology comparisons prior to Q4 2011 cannot be made.

¹⁹ Source: Nielsen VideoCensus (Q4 2012). Using Internet on PC excludes adult content and applications. Estimate is the average of November and December 2012. 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.

²⁰ Nielsen Australian Online Consumer (AOC) Report – audience profile is based on all mobile phone users aged 16+ in Australia. National figures only produced annually. Q1-Q3 2011 figures from 2010-2011 AOC Report (February 2011 edition). Q4 2011 figures onwards from 2011-2012 AOC Report (February 2012 edition).

| P25-34 | Q4 2011 | Q1 2012 | Q2 2012 | Q3 2012 | Q4 2012 |
|--|---------|---------|---------|---------|---------|
| Watching TV in the home ¹⁷ | 79:28 | 81:49 | 84:34 | 84:25 | 73:31 |
| Watching Playback TV | 5:53 | 6:28 | 7:29 | 6:41 | 5:59 |
| Using the Internet on a PC ¹⁸ | 62:39 | 61:00 | 60:47 | 61:18 | 61:55 |
| Watching video on PC/Laptop | 5:12 | 4:48 | 5:08 | 5:10 | - |
| Watching video on Internet (Video Census) ¹⁹ | - | - | - | - | 8:19 |
| Watching video on a mobile phone ²⁰ (Q4 2011) | 2:55 | 2:55 | 2:55 | 2:55 | 2:55 |

| P35-49 | Q4 2011 | Q1 2012 | Q2 2012 | Q3 2012 | Q4 2012 |
|--|---------|---------|---------|---------|---------|
| Watching TV in the home ¹⁷ | 99:23 | 102:28 | 106:00 | 107:23 | 97:19 |
| Watching Playback TV | 7:28 | 8:21 | 9:15 | 8:25 | 8:21 |
| Using the Internet on a PC ¹⁸ | 54:25 | 55:00 | 57:34 | 56:22 | 59:23 |
| Watching video on PC/Laptop | 3:23 | 3:31 | 3:59 | 3:50 | - |
| Watching video on Internet (Video Census) ¹⁹ | - | - | - | - | 5:01 |
| Watching video on a mobile phone ²⁰ (Q4 2011) | 0:57 | 0:57 | 0:57 | 0:57 | 0:57 |

| P50-64 | Q4 2011 | Q1 2012 | Q2 2012 | Q3 2012 | Q4 2012 |
|--|---------|---------|---------|---------|---------|
| Watching TV in the home ¹⁷ | 124:54 | 129:32 | 131:36 | 132:37 | 121:22 |
| Watching Playback TV | 7:46 | 8:37 | 9:24 | 8:44 | 8:22 |
| Using the Internet on a PC ¹⁸ | 50:53 | 53:22 | 54:34 | 54:43 | 59:01 |
| Watching video on PC/Laptop | 3:07 | 3:00 | 3:19 | 3:06 | - |
| Watching video on Internet (Video Census) ¹⁹ | - | - | - | - | 3:21 |
| Watching video on a mobile phone ²⁰ (Q4 2011) | 0:18 | 0:18 | 0:18 | 0:18 | 0:18 |

| P65+ | Q4 2011 | Q1 2012 | Q2 2012 | Q3 2012 | Q4 2012 |
|--|---------|---------|---------|---------|---------|
| Watching TV in the home ¹⁷ | 149:23 | 155:41 | 153:05 | 152:47 | 146:36 |
| Watching Playback TV | 6:29 | 7:11 | 7:51 | 7:51 | 7:42 |
| Using the Internet on a PC ¹⁸ | 31:36 | 32:04 | 32:40 | 33:42 | 35:50 |
| Watching video on PC/Laptop | 1:51 | 1:25 | 1:33 | 1:44 | - |
| Watching video on Internet (VideoCensus) ¹⁹ | - | - | - | - | 1:48 |
| Watching video on a mobile phone ²⁰ (Q4 2011) | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 |

| ALL PEOPLE | Q4 2011 | Q1 2012 | Q2 2012 | Q3 2012 | Q4 2012 |
|--|---------|---------|---------|---------|---------|
| Watching TV in the home ¹⁷ | 94:24 | 97:15 | 99:09 | 99:54 | 91:05 |
| Watching Playback TV | 5:58 | 6:33 | 7:13 | 6:46 | 6:30 |
| Using the Internet on a PC ¹⁸ | 43:54 | 44:06 | 47:24 | 48:00 | 50:42 |
| Watching video on PC/Laptop | 3:27 | 3:15 | 3:58 | 3:55 | - |
| Watching video on Internet (VideoCensus) ¹⁹ | - | - | - | - | 5:54 |
| Watching video on a mobile phone ²⁰ (Q4 2011) | 1:20 | 1:20 | 1:20 | 1:20 | 1:20 |

TABLE 5: VIDEO AUDIENCE COMPOSITION (BY AGE AND GENDER) – Q4 2012

| | KIDS | TEENS | P18-24 | P25-34 | P35-49 | P50-64 | P65+ | Fe- males | Males |
|--|------|-------|--------|--------|--------|--------|------|--------------|-------|
| On Traditional TV ²¹ | 11% | 4% | 5% | 12% | 22% | 24% | 22% | 53% | 47% |
| Q4 2011 | 11% | 4% | 5% | 12% | 22% | 24% | 21% | 53% | 47% |
| On Internet (VideoCensus) ²² | 2% | 5% | 14% | 19% | 28% | 20% | 12% | 50% | 50% |
| On Mobile Phones ²³ (Q4 2011) | N.A. | 2% | 33% | 37% | 23% | 5% | 0% | 38% | 62% |



²¹ 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).

²² Source: Nielsen VideoCensus (Q4 2012). Using Internet on PC excludes adult content and applications. Estimate is the average of November and December 2012. 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.

²³ Nielsen Australian Online Consumer (AOC) Report – audience profile is based on all mobile phone users aged 16+ in Australia. National figures only produced annually. Q1-Q3 2011 figures from 2010-2011 AOC Report (February 2011 edition). Q4 2011 figures onwards from 2011-2012 AOC Report (February 2012 edition).

EXPLANATORY NOTES

- Panel install incidence rates for DTT and PVR are based on combined OzTAM Metro and Regional TAM panels as at last date of each period (Q1=end of P4, Q2=end of P7, Q3=end of P10, Q4=end of P13).
- Quarterly Establishment Survey waves are conducted within standard calendar quarters.
- National Establishment Survey (ES) estimates are based on combined OzTAM Metro and Regional TAM quarterly waves. Quarterly ES waves are conducted within standard calendar quarters.
- Playback mode is defined as television broadcast content recorded and viewed (played back) within seven days of the original broadcast time.
- Other screen usage is TV screen usage that excludes live and playback viewing of broadcast television within seven days of the original broadcast time. It can include non-broadcast activities such as gaming, online activity on the TV screen and playback viewing outside of the 7 day consolidation window.
- Average time spent viewing (ATV) is calculated as the daily average time (0200-2600) within the universe across all days in the calendar quarter multiplied by the factor of numbers of days in the quarter divided by three (3).
- Monthly reach for TV is based on the average of the calendar month cumulative reach audience (0200-2600) within the quarter.
- Video content is defined as a stream where both audio and video are detected. Video viewership excludes adult and advertising content, as well as downloaded content.
- Wherever possible, geographic and demographic data have been matched for like comparisons.
- Nielsen Australian Online Consumer (AOC) report based on online national population aged 16+ and Nielsen Telstra Smartphone Index report based on mobile national population aged 16+.
- Mobile phone ownership and usage sourced from Nielsen Consumer & Media View (people 14+)
- PVR All Households penetration in 'Profiling Tablet and Smart Phone Households' table is based on Combined OzTAM Metro and Regional TAM quarterly Establishment Survey (Q3, 2012). PVR Penetration within TV households in Table 1 is based on install levels from the Combined OzTAM Metro and Regional TAM panels as at the last date of each period.
- TAM data defines 'Kids' as panel members aged 0-12, 'Teens' aged 13-17 and 'Male' / 'Female' as total individuals aged 0+
- Nielsen Netview defines 'Kids' as panel members aged 2-11, 'Teens' aged 12-17 and 'Male' / 'Female' as individuals aged 2+
- Nielsen Australian Online Consumer report defines 'Teens' as respondents aged 16-17 and 'Male' / 'Female' respondents aged 16+

FOR MORE INFORMATION

Should you require more information about any content in this report, please refer to the list below.



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