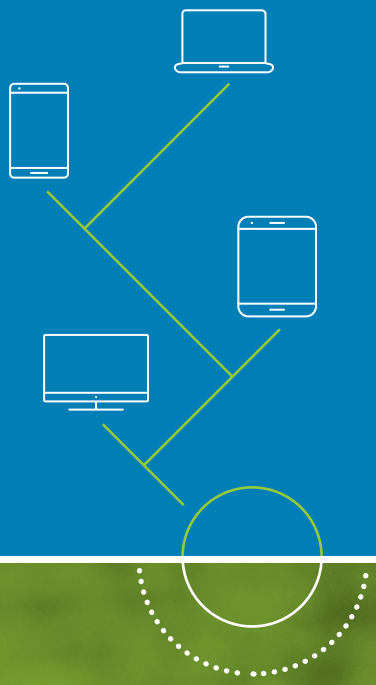
AUSTRALIAN MULTI-SCREEN REPORT



QUARTER 04 2016

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Australian viewing trends across multiple screens

Over its history, the Australian Multi-Screen Report has documented take-up of new consumer technologies and evolving viewing behaviour. Australians are voracious consumers of broadcast TV and other video, and as of the fourth quarter of 2016 had a dizzying array of options by which to do so. Many of these were in their infancy when the report was first published (in Q1 2012, covering the five quarters Q4 2010–Q4 2011).

Together, growing content, platform and screen choice have caused a gradual shift in how consumers apportion their viewing across devices and, accordingly, the time they spend with each of them. As the number of hours in the day is constant, consumers are spreading their available viewing time across multiple screens and platforms.

This fifth anniversary Multi-Screen Report issue begins by overviewing device penetration rates and viewing patterns since Q4 2010, which was the first quarter of data included.

While there is much discussion about television's place in today's screen mix, several trends are clear:

More screens

- Australian homes now have an average of 6.4 screens each, the majority of which are internet capable. More devices create more opportunities to view – not least because any connected device can also be used like a PVR to watch catch up TV or live-stream video.

A little less TV

- Even though people are spreading their viewing across multiple devices, TV remains by far the most-watched screen: across the population, viewing of broadcast TV (free-to-air and subscription channels) watched live or played back within 28 days on in-home TV sets accounts for an average 81 hours and 18 minutes (81:18) per Australian per month, or 2:39 each day.

The TV set is not just for TV any more

- Because television sets can now be used for many purposes in addition to watching TV, 'other TV screen use' is rising, particularly in the evenings: in Q4 2016 other TV screen use was just under 31 hours per Australian per month across the day, with almost half of that in prime time.

  This means 28 per cent of the time people now spend with their TV sets goes to something other than watching live TV or playing back broadcast TV channel content within 28 days – and partially explains why Australians on average now watch 31 fewer minutes of live and playback TV per day than they did in Q4 2010.

  The non-broadcast activities comprising 'other TV screen use' include gaming; viewing TV network catch up services; watching DVDs; playing back recorded broadcast material beyond 28 days; internet browsing; streaming music; watching video on platforms such as YouTube, Facebook or Vimeo; and watching over-the-top internet-delivered video services.

'Longer tail' viewing is rising

- Approximately 2.5 to 3 per cent of all broadcast TV viewing is either time-shifted between 8 and 28 days of original broadcast, or takes place on connected devices (OzTAM VPM data). This viewing is on top of OzTAM and Regional TAM Consolidated 7 viewing data.

The graphic on the following page illustrates the collective influence of new digital technologies, channel and platform choices on audience behaviour over the past six years. While viewing patterns are changing, broadcast TV watched on in-home TV sets still accounts for most video consumption.

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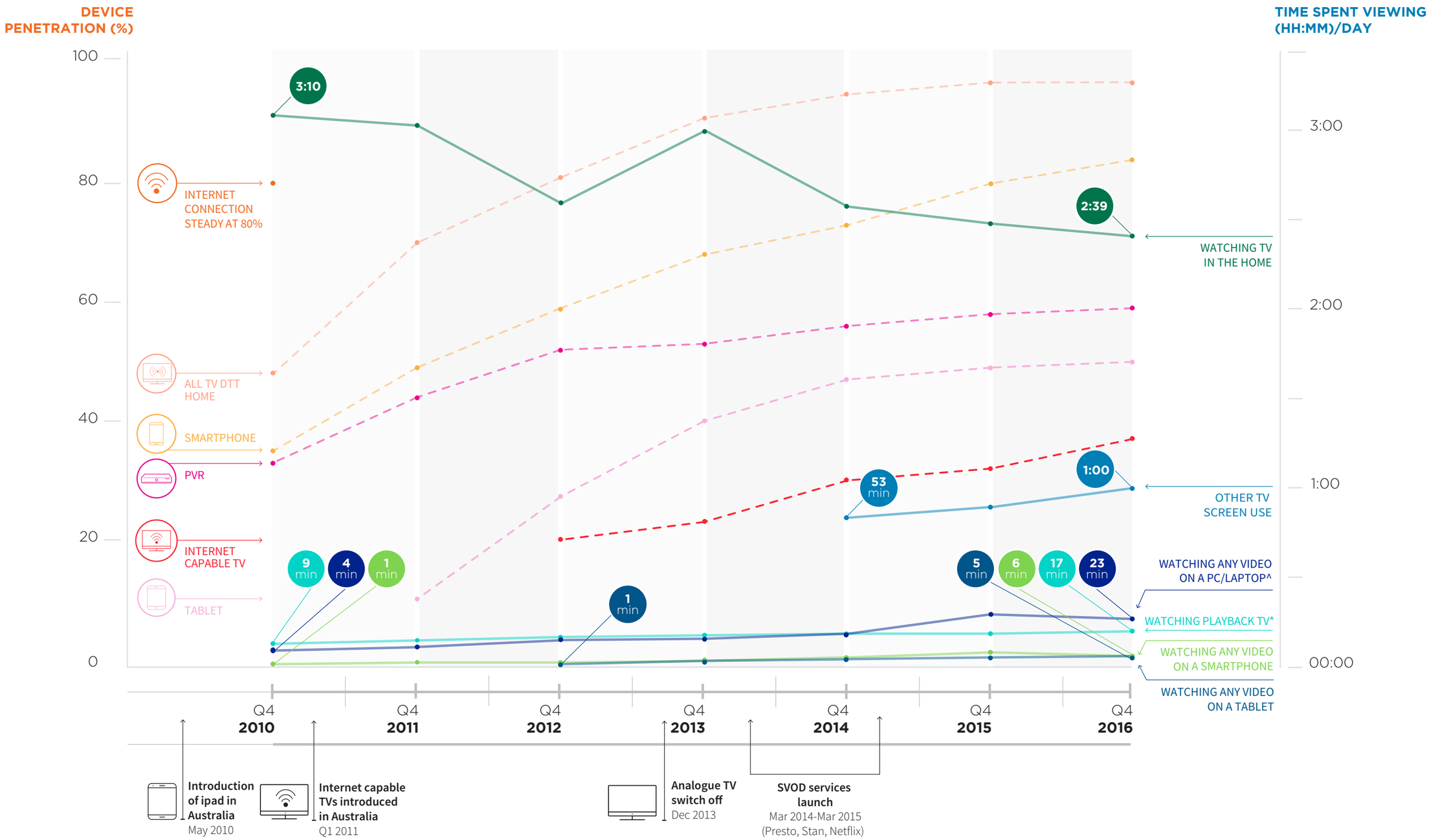
DEVICE PENETRATION AND TIME SPENT WATCHING VIDEO: 2010-2016



Please see explanatory notes on next page

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Notes:

For consistency with tables 1-4, time spent viewing TV and viewing video on smartphones and tablets are per person, and per viewer for PC/laptops. Restating TV, smartphone and tablet figures to be per viewer would give a higher figure for daily time spent watching TV in the home and video on tablets and smartphones. Similarly, restating PC/laptop viewing to be per person would see average daily time spent viewing online video fall. The per person/viewer differences for Q4 2016 are illustrated in the graphic 'Video viewing: average time spent per month' on page 14.

For details on the different datasets please see 'Understanding the data sources,' below.

^Watching any video on PC/Laptop. The market level total time and audience for Nielsen Online Ratings – Hybrid Streaming was understated between January 2015 and June 2016 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 so the July 2016 figure is included as a proxy for Q4 2015. There was a trend break for watching any video on a PC/Laptop in Q4 2012 and figures from this date moving forward should not be compared with historical data.

*Watching Playback TV in the home - Q4 2010-15: within 7 days; Q4 2016: within 28 days. Watching TV in Q4 2010-2015 is Consolidated 7 'what watched'; Q4 2016 is Consolidated 28 'when watched'. Please note the differing bases when comparing, as explained in the Appendix and Explanatory Notes.

The Q4 2010 TV data cited in the inaugural Multi-Screen Report (Q4 2011) was per viewer rather than per person for consistency with the online data. TV data was restated to the more generally understood and used per person TV metric from the Q1 2012 report onwards, and all TV figures in the above infographic are per person.

UNDERSTANDING THE DATA SOURCES

The Multi-Screen Report draws on Australia's best available data sources to estimate devices in homes and time spent viewing TV and other video on various screens. The data sets differ however and to fully appreciate the picture they create, it's important to understand their respective bases, methodologies and scope.

OzTAM and Regional TAM's in-home television audience measurement (TAM) panels estimate the time Australians across age groups spend viewing broadcast television (free-to-air and subscription channels) on in-home TV sets each month. From Q2 2017 these panels will comprise approximately 8,000 homes and 20,000 people that collectively represent the characteristics of the overall population. Estimates are projected to the population as a whole in OzTAM and Regional TAM markets: this provides per person average time spent viewing figures, including people who watch a lot of TV and those who watch relatively little or none.

OzTAM's Video Player Measurement (VPM) reporting service is census, rather than panel, based. This means whenever a person plays content on a connected device via a participating broadcaster's video player, OzTAM captures it – whatever those devices are and wherever they are located.

Nielsen Online Ratings - Hybrid Streaming, from which 'watching video on the internet' figures are derived, is sourced from the Nielsen Online Ratings panel. Online video is measured using both tagged and metered panel based data from home and work panels. This hybrid methodology enables the extrapolation of total market metrics. It estimates the online video activity of active users aged 2+.

Nielsen's Australian Connected Consumers Report surveys a national representative sample of approximately 5,000 online Australians aged 18+ to estimate the online behaviour of the online population aged 18 and over, and place their online behaviours in context against other media use. All ACCR figures are self-reported and include all video (broadcast TV channel and non-broadcast content).

MULTI-SCREEN REPORT DATA SOURCES: APPROACH AND SCOPE

	TAM	VPM	Hybrid Streaming	ACCR
How measured	Technology	Technology	Technology	Self-reported behaviour
Who measured	Representative sample of homes / individual people; estimates are per head across the population in OzTAM and Regional TAM coverage areas, regardless of whether people watch TV or not	All devices playing participating broadcasters' online content	Tagged data and metered panel data among active online users aged 2+	Survey of online population 18+
Scope	Broadcast TV: live + playback through TV set within seven days + time-shifted viewing between eight and 28 days	Online broadcast TV viewed on a connected device	All online video: broadcast and non-broadcast	All online video: broadcast and non-broadcast

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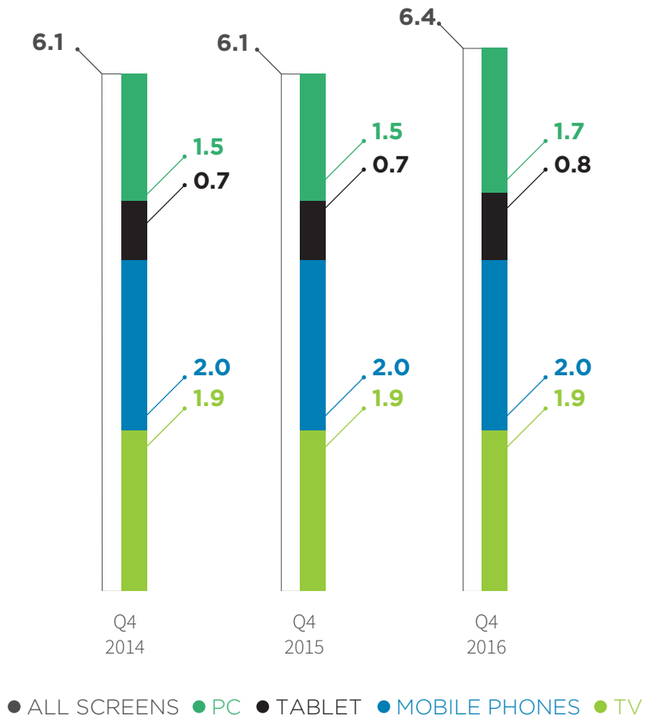
Technology snapshot: screens in Australian homes

Australian homes had an average of 6.4 screens each in Q4 2016, up from 6.1 a year earlier. The number of TV sets and mobile phones has been steady at 1.9 and 2.0, respectively, over the past three years, while the number of tablets and PCs has risen slightly.

The majority of screens in a typical Australian home are now internet capable, and portable connected devices create particular flexibility to view, as they can travel with the consumer anywhere inside or outside the home.

AVERAGE NUMBER OF DEVICES PER HOME



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.

Even though the number of devices in homes is growing, penetration levels for various technologies are plateauing. This is mainly because people will often hold onto an older model device for secondary use when upgrading to a new one.

Internet capable televisions ('smart' or 'hybrid' TVs) continue to see the fastest take up rate, growing five percentage points year-on-year to 37 per cent of homes in Q4 2016.

84 per cent of Australians aged 14+ have a **smartphone**, up from 80 per cent a year ago. **Tablet** penetration is slightly higher than last year, with the devices now in 50 per cent of homes. Since analogue switch-off in late 2013 all Australian TV homes can receive **digital terrestrial television (DTT)** channels. In 97 per cent of homes every working set is DTT capable, and 96 per cent can access **high definition** (HD) channels on all their TVs. Viewer choices now include up to 20 digital free-to-air channels and more than 100 subscription TV channels.

59 per cent of homes have at least one **personal video recorder**; 18 per cent have two or more (both up one percentage point year-on-year).

Household **internet connection** has been steady for more than four years, now at 80 per cent.

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TECHNOLOGY PENETRATION

	Q4 2013	Q4 2014	Q4 2015	Q4 2016
TV HOUSEHOLDS THAT RECEIVE DTT ON **EVERY** WORKING TV SET	91%	95%	97%	97%
TV HOUSEHOLDS THAT RECEIVE **HD** DTT ON **EVERY** WORKING TV SET	87%	92%	95%	96%
PERSONAL VIDEO RECORDER (PVR): PENETRATION WITHIN TV HOUSEHOLDS	53%	56%	58%	59%
2+ PVR: PENETRATION WITHIN TV HOUSEHOLDS	14%	15%	17%	18%
INTERNET CONNECTION: HOUSEHOLD PENETRATION	80%	80%	80%	80%
TABLETS: HOUSEHOLD PENETRATION	40%	47%	49%	50%
INTERNET CAPABLE TV IN HOME	23%	30%	32%	37%
SMARTPHONE: MOBILE PHONE SUBSCRIBERS*	68%	76%	80%	84%

*Source for Smartphone: Mobile Phone Subscribers: Nielsen Consumer & Media View, national population 16+ Q4 2013 and Q4 2014 and Nielsen Online Ratings Establishment Survey, national population 14+ Q4 2015 and Q4 2016.
Internet connection and tablet penetration: rolling four-quarter average Q1 2016-Q4 2016, OzTAM and Regional TAM quarterly Establishment Surveys.

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Viewing across devices

The long term viewing patterns illustrated in the graphic on pages 4-5 are reinforced by the continued high levels of **broadcast TV viewing on in-home TV sets**. Each week in Q4 2016 nearly 20 million Australians watched at least some free-to-air and/or subscription TV, equating to 85.1 per cent of the population in people metered markets.

Reach remains strong among all age groups. For example two thirds of 18-24 year-olds, who are relatively light viewers compared to other age groups, watched broadcast TV channels weekly in the latest quarter.

BROADCAST TV VIEWING ON IN-HOME TV SETS EACH WEEK

	Q4 2015 CONSOLIDATED TO 7 DAYS	Q4 2016 CONSOLIDATED TO 28 DAYS	Q4 2016 CONSOLIDATED TO 28 DAYS
	% REACH	% REACH	WEEKLY AVERAGE CUMULATIVE REACH
TOTAL PEOPLE	87.4	85.1	19.98m
KIDS	88.6	85.4	3.26m
TEENS	77.3	75.7	1.08m
P18-24	70.5	66.3	1.47m
P25-39	83.6	79.3	3.99m
P40-54	92.0	90.9	4.29m
P55-64	94.2	93.7	2.51m
P65+	95.2	94.8	3.37m

Average 1-minute weekly cumulative reach across the population in OzTAM and Regional TAM coverage areas. Includes live viewing and and playback through the TV set at the time it is watched ('when watched') within 28 days (Q4 2016) and playback through the TV set within seven days (Q4 2015).

Please note the differing playback bases if making year-on-year comparisons, as explained in the Appendix and Explanatory Notes.

Taking an in-depth look at how Australians view on various screens:

- **Time spent viewing broadcast TV on in-home sets only:**

  Across the population 89.6 per cent [72 hours and 51 minutes (72:51)] of broadcast TV (free-to-air and subscription channels) is watched live-to-air each month. 8.4 per cent (6:51) is played back through the TV set within seven days, and 1.9 per cent (1:35) is time-shifted between eight and 28 days of the original broadcast.

- **Across all screens, devices and types of video among the population as a whole:**

  86.6 per cent of viewing (81:18) is broadcast TV content watched on in-home sets within 28 days of original transmission. 7.8 per cent of viewing is on PC/laptops; 2.9 per cent on smartphones; and 2.7 per cent on tablets.

  Those figures are averages across the entire population in TV metered markets, and the online universe, and include heavy, light and non-viewers (left-hand side of graphic on the following page, 'Video viewing, average time spent per month.')

- **Narrowing the focus to only those people who view TV or any kind of video on PC/laptop, smartphone or tablet:**

  The right-hand side of the following graphic looks at the average time spent viewing each month by Australians who watch TV or any kind of video, and excludes non-viewers. As the universes (population bases) are dramatically different it is not possible to apportion share of time spent viewing across devices using the viewer metric.

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

TV // PC // SMARTPHONE // TABLET

	POPULATION UNIVERSE				VIEWER UNIVERSE			
	TOTAL	LIVE	PLAYBACK TO 7	PLAYBACK TO 8-28	TOTAL	LIVE	PLAYBACK TO 7	PLAYBACK TO 8-28
OZTAM | REGIONAL TAM — WATCHING TV ON TV SET	81:18	72:51	6:51	1:35	86:27	77:31	7:15	1:41
	BASED TO 23.5 *million TAM people 0+*				BASED TO 22.2 *million people*			
NIELSEN ONLINE HYBRID STREAMING — WATCHING VIDEO ON PC/LAPTOP	7:18				12:07			
	BASED TO 23.5 *million online people 2+*				BASED TO 13.7 *million*			
AUSTRALIAN CONNECTED CONSUMER REPORT — WATCHING VIDEO ON A SMARTPHONE	2:46				17:55			
	BASED TO 16.7 *million online people 18+*				BASED TO 2.7 *million*			
AUSTRALIAN CONNECTED CONSUMER REPORT — WATCHING VIDEO ON A TABLET	2:34				17:28			
	BASED TO 16.7 *million online people 18+*				BASED TO 2.5 *million*			

The figures to the left show both the population universe (per person, across the population as a whole within OzTAM and Regional TAM coverage areas; and within the Australian online universe) and also per viewer, as noted. Please see Appendix for details.

Time spent watching TV is from OzTAM and Regional TAM in-home panels and includes live and playback viewing up to 28 days after broadcast through the TV set at the time the content is actually viewed ('when watched' TV; for details see the Appendix or Explanatory Notes).

Watching video on a PC/laptop is from Nielsen Online Ratings - Hybrid Streaming among aged people 2+ using tagged data and metered panel data and includes all online video – broadcast and non-broadcast. Streaming figures are for October-December 2016[1].

Viewing on smartphones and tablets is claimed behaviour by an annual survey of online Australians aged 18+ from Nielsen's Australian Connected Consumers Report 2017 and includes all online video.

The time spent per viewer tablet and smartphone figures in Q4 2016 are higher than the corresponding figures in the Q2 and Q3 2016 Multi-Screen reports because the figures have been restated to per viewer (rather than per person across the online population). Doing so reduces the reach estimate to 2.7m and 2.5m Australians aged 18+ who actually watch video on a smartphone and tablet, respectively.

This shows that the number of people who watch video on a tablet or smartphone is relatively small, but among those who do, many are heavy viewers.

Fractional minutes have been rounded.

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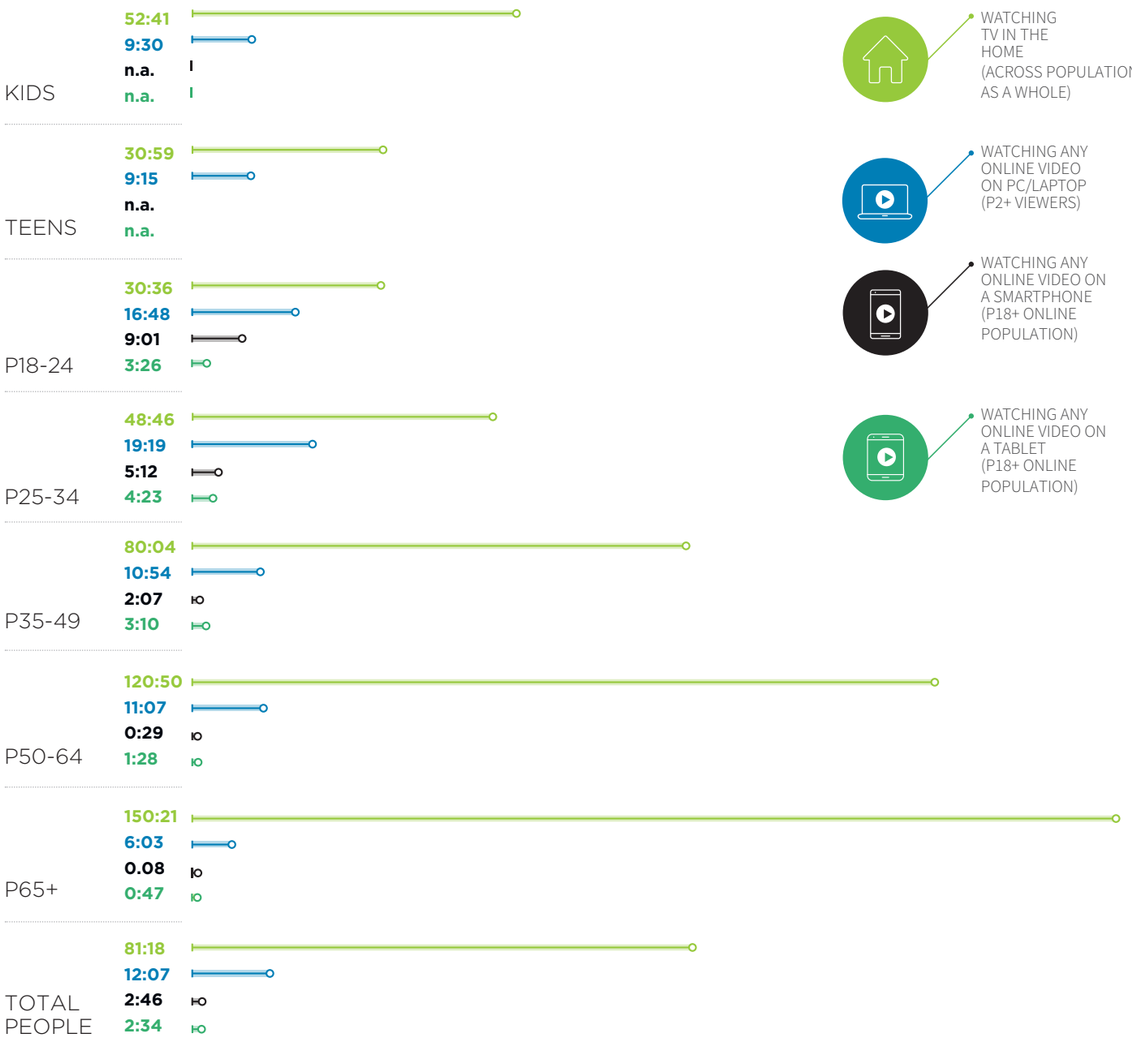
A MONTH IN THE LIFE (HH:MM)

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



Watching TV in the home is Consolidated 28 'when watched' data across the population. Please see Appendix or Explanatory Notes for details. Time spent watching any online video on a PC/Laptop is per active viewer; time spent watching online video on a smartphone or tablet is per person in the online population 18+.

As has been apparent for the past few years, the combined impact of more choice and a finite number of available viewing hours in the day is Australians are spending a little less time on a typical day watching broadcast TV on in-home TV sets than they did a year earlier. The cross-screen 'spreading' behaviour noted in the introduction is most pronounced among younger audiences.

Of Australians aged 2+ who watched any **online video on a PC or laptop** (in other words, actual viewers), they spent on average 12:07 per month doing so in Q4 2016. Across the population that equates to 7:18 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 69:15 per active user aged 2+ each month in the quarter[2]. Online Australians aged 18 or over who claim to watch any video on a smartphone or a tablet say that they spend 17:55 doing so on a smartphone and 17:28 doing so on a tablet monthly. Across the 18+ online population, that equates to 2:46 on smartphones and 2:34 on tablets each month.

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Total use of the television set

As noted in the introduction, and evident in several years of Multi-Screen Report analysis, the way Australians use their TV sets is changing as sets become increasingly multi-functional. Shifting TV use patterns provide another example of how screen activity is spreading across devices, and with that the time people spend with various screens.

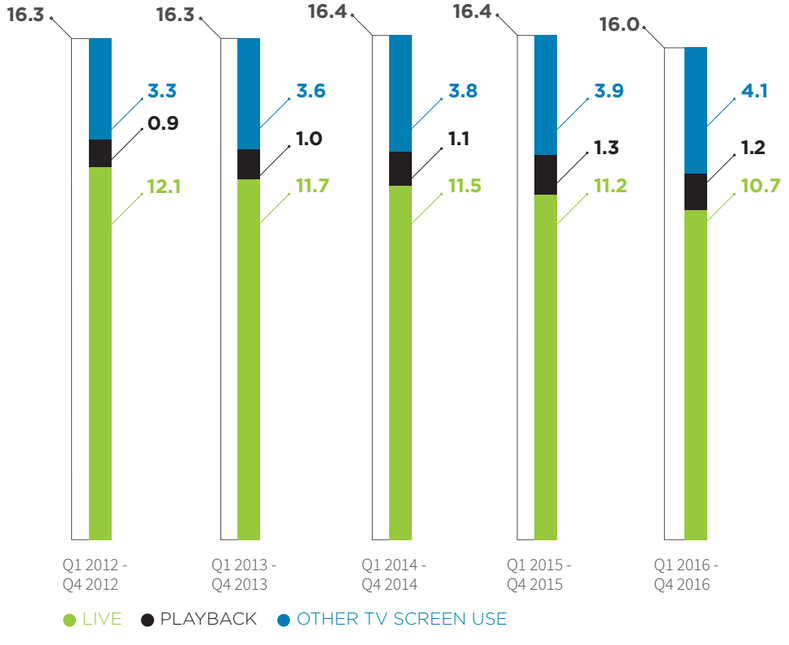
Evolving **total TV set use** stems from the adoption of internet-capable sets and/or devices attached to the TV set that enable '**other TV screen use**'. This captures activities such as gaming; viewing TV network catch up services; watching DVDs; playing back recorded broadcast material beyond 28 days; internet browsing; streaming music; watching video on platforms such as YouTube, Facebook or Vimeo; and accessing over-the-top internet-delivered video services.

Australians' total use of their TV sets fell 0.4 per cent TARP year-on-year in the latest four-quarter period. The proportion of time people devoted to other screen use rose from 3.9 per cent TARP in the rolling four-quarter period through Q4 2015 to 4.1 per cent TARP now. **Playback** of broadcast content through the TV was 0.1 per cent TARP lower at 1.2 per cent TARP. **Live** viewing through the TV set fell to 10.7 per cent TARP from 11.2 per cent TARP a year earlier. Since 2012 live viewing has dropped by 1.4 per cent TARP.

For most age groups, playback viewing in the latest four-quarter period was level or slightly lower than a year earlier; the exception was people 55+, who watched slightly more. Likewise over-55s' live viewing held steady while it fell for viewers in other demographics. People aged 55+ spent more time overall with their TV sets with the rise in their playback viewing and other screen use.

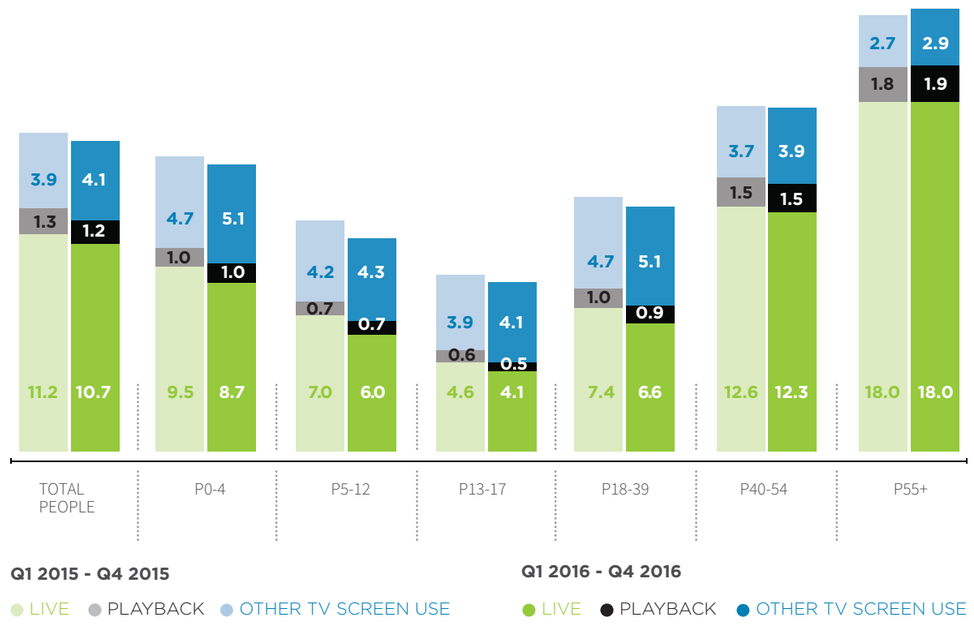
All age groups increased their other screen use year-on-year – notably kids aged 4 and under, and 18-39 year-olds. 13-17s devote the greatest proportion of their total TV screen time to other TV screen use: 4.1 per cent TARP in the latest period, equal to the share of time they spend watching live TV.

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 Q1 2016 - Q4 2016 (far right bar, left) an estimated 16.0 per cent of Australians were using their in-home TV screens.

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.

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Viewing patterns across the day

The changing way Australians use their TV sets is increasingly apparent in prime time, when people generally have the most available time to view.

The addition of 8-28 day time-shifted viewing at the time the broadcast material was actually watched saw total playback viewing (playback to 7 + time shift 8-28) across the day at 8 hours and 26 minutes (8:26) per person across the population each month in Q4 2016. In prime time, such viewing was 4:37.

On an all-day (24-hour) basis, other TV screen use rose from 28:43 per Australian each month in Q4 2015 (*including 8-28 day time-shifted viewing*) to 30:56 per month *excluding* 8-28 day time-shifted viewing in Q4 2016. On the same basis, other TV screen use in prime time rose by 1:07.

Across the day Australians spend 28 per cent of their time with the TV set doing something other than watching live or playing back broadcast TV within 28 days. In prime time the proportion is 25 per cent.

Together, other TV screen use and 8-28 day time-shifted viewing now account for 14:37 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 2:34 on average per month across the day, and by 1:22 in prime time, impacted by the decline in broadcast viewing.

TOTAL PEOPLE	0200-2600		1800-2400	
	Q4 2015	Q4 2016	Q4 2015	Q4 2016
TOTAL TV SCREEN USE	**114:48**	**112:14**	**57:05**	**55:43**
TOTAL BROADCAST TV:	**86:05**	**81:18**	**44:23**	**41:53**
Watching live TV	77:57	72:51	39:56	37:15
Watching playback to 7 TV	8:08	6:51	4:27	3:49
Watching playback 8-28 TV	n.a	1:35	n.a	0:48
OTHER TV SCREEN USE	**28:43**	**30:56**	**12:42**	**13:49**

Playback 'when watched' TV

Q4 2016 Other TV screen use excludes 8-28 day timeshift || Q4 2015 Other TV screen use includes 8-28 day timeshift.
Time bands use the industry standard 26-hour TV clock: 0200-2600 = 2am-2am; 1800-2400 = 6pm-midnight.

Update on TV content played on connected devices: OzTAM Video Player Measurement (VPM) live and catch up viewing data

Each issue of the Australian Multi-Screen Report has examined people's evolving TV viewing patterns as their options have steadily grown beyond linear broadcast schedules and the television screen itself. In response to the media industry's wish to understand how much broadcast content is being consumed on internet-enabled devices, OzTAM introduced its Video Player Measurement (VPM) Report in Q1 2016.

The VPM Report provides Australia's first official measure of viewing of internet-delivered TV content on devices such as tablets, smartphones, smart TVs, desktop and laptop computers and games consoles. The VPM Report captures 'census' level (i.e., all video player activity) data on the devices playing video from participating broadcasters' online services. As of Q4 2016, those broadcasters include the metropolitan commercial free-to-air and the national public and subscription television networks.

OzTAM launched the service with rolling daily reports of catch up viewing – initially for the previous seven days, expanding to 28 days in Q2 2016 – and in February 2017 further broadened the report to include live-streaming (that is, internet-delivered live streams of broadcast channels' live-to-air transmissions).

In Q4 2016, Australians played, on average, 223 million minutes of broadcasters' content each week. This comprised 176 million minutes of catch up (or on demand) viewing, and 47 million minutes of live-streamed material. Catch up peaked during October with a weekly average total of 205 million minutes, while live streaming peaked during November with a weekly average total of 58 million minutes.

Overall, viewing of online broadcast content – including catch up and live streaming – currently accounts for approximately 1–2 per cent all broadcast content viewed each week. However this can represent a sizeable portion of a program episode's total audience, similar to the way some broadcast programs see significant audience increases from time-shifted viewing.

There are some differences in how people view live and catch up online TV. The most-streamed live programs tend to be sport and news, given the 'perishable' nature of the content. Catch up is more about watching at a time and manner of the viewer's choosing: drama and entertainment are usually the most watched online catch up programs. Both are important in understanding how people engage with TV content, and the opportunity to live stream or catch up keeps audiences close to their favourite programs.

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KEY OBSERVATIONS

TABLE 01 **TECHNOLOGY PENETRATION**	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
Completely DTT: Penetration within TV households [3] (Homes capable of receiving DTT on **each** working TV within the home)	97%	97%	97%	97%	97%
HD TV: Penetration within TV households (Homes capable of receiving **HD DTT** on **each** working TV within the home)	95%	95%	96%	96%	96%
Personal video recorder (PVR): Penetration within TV households	58%	58%	59%	60%	59%
2+ PVR: Penetration within TV households	17%	17%	17%	17%	18%
Internet connection: Household penetration [4]	80%	81%	81%	80%	80%
Tablets: Household penetration	49%	49%	49%	49%	50%
Internet capable TV in home (whether connected or not)	32%	35%	36%	37%	37%
Smartphones: People 14+ [5]	80%	81%	81%	84%	84%

TABLE 02 **MONTHLY TIME SPENT** (HH:MM)	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
Watching broadcast TV in the home per person across the population[6]:	85:17				
		86:51	90:02	90:16	81:18
Watching Live TV	77:57	77:44	80:22	81:21	72:51
Watching Playback to 7 TV *(what watched)*	7:20				
(when watched)		7:36	8:03	7:22	6:51
Watching Time Shift 8-28 TV	n.a				
(when watched)		1:31	1:36	1:33	1:35
Online time spent per active user [7]	31:12				
		50:30	54:44		
				62:28	69:15
Watching video on internet per viewer [8]			12:48	12:46	12:07
Watching online video on a smartphone per person across online population [9] (2016: ppl 18+; 2015: ppl 16+)	4:18	n.a.	n.a.	n.a.	2:46
Watching online video on a tablet per person across online population [9] (2016: ppl 18+: 2015; ppl 16+)	3:01	n.a.	n.a.	n.a.	2:34

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TABLE 03

OVERALL USE (000S), MONTHLY REACH	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
Watching broadcast TV in the home per person across the population[6]:	22,154				
		22,367	22,396	22,341	22,244
Watching Live TV	22,081	22,215	22,264	22,204	22,057
Watching Playback to 7 TV	12,343				
		12,629	12,556	12,642	12,652
Watching Time Shift 8-28 TV	n.a				
		9,208	9,079	9,169	9,615
Online unique audience [7]	18,409				
		19,567	19,720	19,799	19,788
Watching video on internet per viewer [8]			13,970	13,850	13,742
Owning/using a smartphone [5]	15,647	16,183	16,261	16,720	16,621
Watching online video on a smartphone per person across online population [9] (2016: ppl 18+; 2015: ppl 16+)	4,065	n.a.	n.a.	n.a.	2,668
Watching online video on a tablet per person across online population [9] (2016: ppl 18+: 2015; ppl 16+)	2,710	n.a.	n.a.	n.a.	2,502

TABLE 04

A MONTH IN THE LIFE - Q4 2016	KIDS[10]	TEENS[11]	P18-24	P25-34	P35-49	P50-64	P65+	TOTAL PEOPLE
Watching broadcast TV in the home per person across the population[6] (Consolidated to 28 days in Q4 2016)	52:41	30:59	30:36	48:46	80:04	120:50	150:21	81:18
Q4 2015 (Consolidated to 7 days)	*59:23*	*33:46*	*36:06*	*56:44*	*86:15*	*120:48*	*150:51*	*85:17*
Watching Live TV	47:13	27:27	27:03	42:57	70:33	109:12	136:14	72:51
Q4 2015	*54:48*	*30:43*	*32:22*	*51:08*	*77:29*	*111:04*	*139:33*	*77:57*
Watching Playback to 7 TV *(when watched)*	3:55	2:47	2:54	4:31	7:43	9:34	12:00	6:51
(what watched) Q4 2015	*4:.35*	*3:03*	*3:44*	*5:36*	*8:46*	*9:44*	*11:18*	*7:20*
Watching Time Shift 8-28 TV	1:31	0:44	0:38	1:17	1:47	2:02	2:07	1:35
Online time spent per active user [7]	3:18	3:53	72:01	82:51	95:24	93:06	42:06	69:15
Watching video on internet per viewer [8]	9:30	9:15	16:48	19:19	10:54	11:07	6:03	12:07
Watching online video on a smartphone per person across online population [9] (2016: ppl 18+; 2015: ppl 16+)	n.a.	n.a.	9:01	5:12	2:07	0:29	0:08	2:46
Watching online video on a tablet per person across online population [9] (2016: ppl 18+: 2015; ppl 16+)	n.a.	n.a.	3:26	4:23	3:10	1:28	0:47	2:34

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

KIDS[10]		Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
Watching broadcast TV in the home per person across the population[6]:		59:23				
			57:14	60:18	60:46	52:41
Watching Live TV		54:48	51:15	54:12	54:42	47:13
Watching Playback to 7 TV	*(what watched)*	4:35				
	(when watched)		4:28	4:36	4:29	3:55
Watching Time Shift 8-28 TV		n.a				
	(when watched)		1:30	1:29	1:33	1:31
Online time spent per active user[7]		4:47				
			3:41	3:21		
					3:11	3:18
Watching video on internet per viewer[8]				14:41	14:23	9:30

TEENS[11]		Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
Watching broadcast TV in the home per person across the population[6]:		33:46				
			32:00	34:31	35:37	30:59
Watching Live TV		30:43	28:28	30:36	31:49	27:27
Watching Playback to 7 TV	*(what watched)*	3:03				
	(when watched)		2:54	3:12	3:04	2:47
Watching Time Shift 8-28 TV		n.a				
	(when watched)		0:38	0:43	0:43	0:44
Online time spent per active user[7]		8:45				
			5:53	4:53		
					4:05	3:53
Watching video on internet per viewer[8]				4:46	6:35	9:15

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

P18 - 24		Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
Watching broadcast TV in the home per person across the population[6]:		36:06				
			38:12	38:50	37:02	30:36
Watching Live TV		32:22	33:41	33:40	32:52	27:03
Watching Playback to 7 TV	*(what watched)*	3:44				
	(when watched)		3:47	4:12	3:26	2:54
Watching Time Shift 8-28 TV		n.a				
	(when watched)		0:43	0:57	0:44	0:38
Online time spent per active user[7]		25:41				
			52:10	60:27		
					68:33	72:01
Watching video on internet per viewer[8]				21:52	20:03	16:48
Watching online video on a smartphone per person across online population[9] (2016: ppl 18+; 2015: ppl 16+)		14:11	n.a.	n.a.	n.a.	9:01
Watching online video on a tablet per person across online population[9] (2016: ppl 18+: 2015; ppl 16+)		5:35	n.a.	n.a.	n.a.	3:26

P25 - 34		Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
Watching broadcast TV in the home per person across the population[6]:		56:44				
			57:40	58:29	57:29	48:46
Watching Live TV		51:08	50:38	51:08	50:59	42:57
Watching Playback to 7 TV	*(what watched)*	5:36				
	(when watched)		5:47	6:00	5:12	4:31
Watching Time Shift 8-28 TV		n.a				
	(when watched)		1:14	1:20	1:16	1:17
Online time spent per active user[7]		35:16				
			71:09	70:45		
					81:04	82:51
Watching video on internet per viewer[8]				18:41	19:16	19:19
Watching online video on a smartphone per person across online population[9] (2016: ppl 18+; 2015: ppl 16+)		6:53	n.a.	n.a.	n.a.	5:12
Watching online video on a tablet per person across online population[9] (2016: ppl 18+: 2015; ppl 16+)		6:32	n.a.	n.a.	n.a.	4:23

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

P35 - 49	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
Watching broadcast TV in the home per person across the population[6]:	86:15				
		85:59	91:24	91:01	80:04
Watching Live TV	77:25	75:34	80:13	80:54	70:33
Watching Playback to 7 TV *(what watched)*	8:46				
(when watched)		8:46	9:22	8:24	7:43
Watching Time Shift 8-28 TV	n.a				
(when watched)		1:38	1:48	1:43	1:47
Online time spent per active user[7]	34:27				
		65:46	71:56		
				83:03	95:24
Watching video on internet per viewer[8]			11:35	11:24	10:54
Watching online video on a smartphone per person across online population[9] (2016: ppl 18+; 2015: ppl 16+)	3:01	n.a.	n.a.	n.a.	2:07
Watching online video on a tablet per person across online population[9] (2016: ppl 18+: 2015; ppl 16+)	3:26	n.a.	n.a.	n.a.	3:10

P50 - 64	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
Watching broadcast TV in the home per person across the population[6]:	120:48				
		124:38	130:28	131:53	120:50
Watching Live TV	111:04	112:16	117:35	119:48	109:12
Watching Playback to 7 TV *(what watched)*	9:44				
(when watched)		10:31	10:57	10:08	9:34
Watching Time Shift 8-28 TV	n.a.				
(when watched)		1:50	1:55	1:56	2:02
Online time spent per active user[7]	38:01				
		63:39	70:49		
				81:47	93:06
Watching video on internet per viewer[8]			10:34	10:32	11:07
Watching online video on a smartphone per person across online population[9] (2016: ppl 18+; 2015: ppl 16+)	0:52	n.a.	n.a.	n.a.	0:29
Watching online video on a tablet per person across online population[9] (2016: ppl 18+: 2015; ppl 16+)	0:43	n.a.	n.a.	n.a.	1:28

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

P65+	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
Watching broadcast TV in the home per person across the population[6]:	150:51				
		156:04	157:07	158:43	150:21
Watching Live TV	139:33	141:58	142:13	144:40	136:14
Watching Playback to 7 TV *(what watched)*	11:18				
(when watched)		11:59	12:49	12:04	12:00
Watching Time Shift 8-28 TV	n.a				
(when watched)		2:06	2:04	1:58	2:07
Online time spent per active user[7]	27:46				
		29:34	31:32		
				34:08	42:06
Watching video on internet per viewer[8]			5:10	5:50	6:03
Watching online video on a smartphone per person across online population[9] (2016: ppl 18+; 2015: ppl 16+)	n.a.	n.a.	n.a.	n.a.	0:08
Watching online video on a tablet per person across online population[9] (2016: ppl 18+: 2015; ppl 16+)	0:52	n.a.	n.a.	n.a.	0:47

TOTAL PEOPLE	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
Watching broadcast TV in the home per person across the population[6]:	85:17				
		86:51	90:02	90:16	81:18
Watching Live TV	77:57	77:44	80:22	81:21	72:51
Watching Playback to 7 TV *(what watched)*	7:20				
(when watched)		7:36	8:03	7:22	6:51
Watching Time Shift 8-28 TV	n.a				
(when watched)		1:31	1:36	1:33	1:35
Online time spent per active user[7]	31:12				
		50:30	54:44		
				62:28	69:15
Watching video on internet per viewer[8]			12:48	12:46	12:07
Watching online video on a smartphone per person across online population[9] (2016: ppl 18+; 2015: ppl 16+)	4:18	n.a.	n.a.	n.a.	2:46
Watching online video on a tablet per person across online population[9] (2016: ppl 18+: 2015; ppl 16+)	3:01	n.a.	n.a.	n.a.	2:34

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TABLE 05 **VIDEO AUDIENCE COMPOSITION (BY AGE AND GENDER)**

Q4 2016	KIDS	TEENS	P18-24	P25-34	P35-49	P50-64	P65+	FEMALES	MALES
On broadcast TV[6] (Consolidated to 28 days in Q4 2016)	11%	2%	4%	9%	20%	27%	28%	53%	47%
Q4 2015 (Consolidated to 7 days)	*11%*	*2%*	*4%*	*10%*	*20%*	*26%*	*26%*	*53%*	*47%*
On internet[8]	4%	3%	10%	16%	29%	25%	13%	48%	52%
Q4 2015	*4%*	*4%*	*8%*	*16%*	*30%*	*25%*	*13%*	*52%*	*48%*
On smartphone[9]	n.a	n.a	25%	35%	28%	9%	3%	47%	53%
Q4 2015	*n.a*	*n.a*	*32%*	*34%*	*26%*	*7%*	*1%*	*46%*	*54%*
On tablet[9]	n.a	n.a	11%	27%	34%	17%	10%	50%	50%
Q4 2015	*n.a*	*n.a*	*18%*	*26%*	*31%*	*18%*	*7%*	*47%*	*53%*

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 in the Multi-Screen Report for the time period January 2015 – June 2016 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 (2am-2am)] across the population within metered markets. Includes free-to-air and subscription television viewing. Playback 'when watched' TV for Q1-Q4 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. 'Watching TV', and 'Watching Playback TV' are based on Consolidated 7 or Consolidated 28 data, as noted. Playback is broadcast TV channel 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 Q4 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 2016-2017 (March 2017 edition) - respondents aged 18 years and over (inclusive of total online population regardless of video consumption). Figures for Q4 2015 were for respondents aged 16+. National figures produced annually citing 16% of the online population aged 18+ for mobile video audience and 15% for tablet video audience. Online universe figure representative of online audience of 16,681,000 from Digital Ratings (Monthly) (December 2016). Monthly estimate based on self-reported weekly time spent multiplied by average number of weeks in a month (4.348). Figure relates to streaming TV, movie and other video content. Due to adjustments in methodology applied to the 2016 Nielsen Australian Connected Consumers Report, the average hours metric across all devices has undergone a trend break. Therefore historical comparisons of this metric in previous report editions should not be made.

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 and Nielsen Digital Ratings Monthly (DRM) as aged 12-17.

APPENDIX

In the spirit of continual improvement and efforts to incorporate the best available data and insights from OzTAM, Regional TAM and Nielsen, the Q4 2016 issue of the Australian Multi-Screen Report retains and builds on a number of enhancements introduced in Q2 2016.

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

ENHANCEMENTS AND AMENDMENTS

Element	Time period	Specifics	Rationale	Appears in
Consolidated 28 viewing data	Q1 – Q4 2016	Broadcast TV material watched live or played back *through the TV set* within 28 days.	Illustrates growth in 'longer-tail' viewing through TV sets.	• Broadcast TV viewing on in-home TV sets (p. 12) • Video viewing, average time spent per month (p. 14) • A month in the life (p. 16) • Total use of the TV set (p. 18-19) • Tables 2, 4, 4a, 5
'When watched' viewing data	Q1 2016 onwards	Reports playback within 28 days viewing through TV sets *at the time it actually occurs*.	Provides another perspective on time-shifting behaviour, and complements 'what watched' (Consolidated 28) data, in which playback is attributed back to the time of the original broadcast.	• All references to watching TV in the home, unless noted otherwise as 'what watched'.
'Per person' PC/ Laptop data and 'per viewer' TV data	Q2 – Q4 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.	PC/Laptop numbers are restated to per person rather than per active user, and appear alongside the active universe data. Since Q1 2011 average time spent viewing TV in the Multi-Screen Report has 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. Nielsen's PC/laptop online video viewing data have always been per viewer; Australian Connected Consumers report claimed figures have always been across the online population. 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.	• Video viewing, average time spent per month (p. 16)
Nielsen Online Ratings (NOR) - Hybrid Streaming data: correction	Q1 2015 - Q2 2016	Corrects progressive understatement of market level total time and audience for NOR from January 2015 - June 2016.	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. 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.	• Video viewing, average time spent per month (p. 14) • A month in the life (p. 16) • Tables 2, 4, 4a, 5

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GUIDELINES FOR COMPARING Q4 2016 DATA WITH EARLIER PERIODS

Element	Time period	OK to compare Q4 2016 with earlier periods?	Reason why/not and (if applicable) an example	Appears in
Consolidated 28 viewing data	Q1 – Q4 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: "Q4 2016 includes playback to 28; Q4 2015 includes playback to 7 only."	• Broadcast TV viewing on in-home TV sets (p. 12) • Video viewing, average time spent per month (p. 14) • A month in the life (p. 16) • Total use of the TV set (p. 18-19) • Tables 2, 4, 4a, 5
'When watched' viewing data	Q1 2015 – Q1 2016, appear in total TV screen use only. Q2 2016 also in average time spent viewing/ month. From Q3 2016, 'when watched' data is used throughout the report.	Yes, provided 'when watched' is compared to 'when watched', and 'what watched' to 'what watched'.	'When watched' and 'what watched' data yield slightly different time spent viewing figures because the playback bases are different. To understand why: Program X airs on Sunday at 20.30. A viewer watches this program at midday on Tuesday. In 'when watched' the playback activity would be at midday on Tuesday. In 'what watched' the playback viewing would be attributed back to 20.30 on Sunday (OzTAM and Regional TAM Consolidated 7 and Consolidated 28 viewing databases).	While 'when watched' appears throughout the Q4 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.
'Per person' PC/Laptop data and 'per viewer' TV data	Q2 – Q4 2016	No.	PC/Laptop numbers in Q1 2016 and earlier quarters were per active user, rather than the population as a whole, and have been restated since Q2 2016 to per person. In the Q4 2016 report, for the first time per viewer smartphone and tablet video viewing figures have also been included, and appear alongside the online population data. Average time spent viewing TV in the Multi-Screen Report has consistently 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.	• Video viewing, average time spent per month (p. 14)
Nielsen Online Ratings (NOR) - Hybrid Streaming data: correction	Q1 2015 – Q2 2016	No.	Errors in the Nielsen data from January 2015- June 2016 mean historical NOR data from that period cannot be used. 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. **At no time in this period were there any errors or trend breaks in OzTAM or Regional TAM TV data.**	• Video viewing, average time spent per month (p. 14) • A month in the life (p. 16) • Tables 2, 4, 4a, 5

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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- Q4 2016 and '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 Q4 2015.
- The Q1-Q3 2016 Multi-Screen Report tables carried the label 'Playback 8-28'. This has now been amended to 'Time Shift 8-28' for consistency with labels in the OzTAM and Regional TAM databases, given the technical term 'Playback' includes As-Live viewing.
- Other Screen Use is TV screen use that excludes live and playback viewing of broadcast television within 28 days of the original broadcast time. Such activity can include gaming; viewing TV network catch up services; watching DVDs; playing back recorded broadcast material beyond 28 days; internet browsing; streaming music; watching video on platforms such as YouTube, Facebook or Vimeo; and watching over-the-top internet-delivered video (SVOD) services.
- Time bands cited use the standard 26-hour TV clock. 0200-2600 is 2am-2am; 1800-2400 is 6pm-midnight.
- 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 2017 (ACC) based on online national population aged 18+.
- 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 'Male' / 'Female' respondents aged 18+.
- OzTAM's VPM Report captures minute-by-minute viewing of participating broadcasters' online 'catch up TV' and live-streamed content played to connected devices such as tablets, smartphones, smart TVs, games consoles and PCs/ laptops.
- 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

Explanatory Notes

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.

- 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 in the Multi-Screen Report during the period January 2015 – June 2016 should not be used. At no time in this period were there any issues or trend breaks in OzTAM or Regional TAM TV data.

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