

AUSTRALIAN MULTI-SCREEN REPORT

QUARTER 1
2014



TV AND OTHER VIDEO CONTENT ACROSS MULTIPLE SCREENS

The Q1 2014 edition of the Australian Multi-Screen Report takes a closer look at evolving viewing patterns by age group and also updates the take-up rates of internet-connected devices in Australian homes.

As seen in earlier quarters, viewing of broadcast television is consistent, with Australians watching, on average, just over three hours of TV per day on in-home TV sets, even as their options for accessing TV and other video content expand dramatically. Many age groups have increased their TV viewing year-on-year, and across the population people watched an additional 37 minutes of broadcast television per month in the quarter.

While viewing patterns continue to evolve, particularly among younger people, all age groups spend the majority of their viewing time watching broadcast television on in-home sets.

This follows Australia's transition to fully digital broadcasting, the progressive take up of bigger and internet capable TV screens, and increasing number of channels available to households, both free-to-air and subscription.

In most cases, Australians are using new technologies to add to or complement their viewing of traditional TV.



NEW TECHNOLOGIES IN AUSTRALIAN HOMES

Australians continue to adopt new internet capable devices, which create additional opportunities for them to view broadcast TV and other video content.

As in previous quarters, tablets have the fastest adoption rate, now in 42 per cent of homes (up from 31 per cent in Q1 2013, and 40 per cent in Q4 2013).

69 per cent of Australians aged 16 and over own a smartphone (61 per cent in Q1 2013).

With the increasing incidence of these mobile connected devices in the home, interest in how they are influencing audience behaviour is growing. For example, in a previous Multi-Screen Report we explored the impact of a new tablet in the home. More recently, new research from Nielsen in the United States examines mobile device use, sharing and co-viewing.

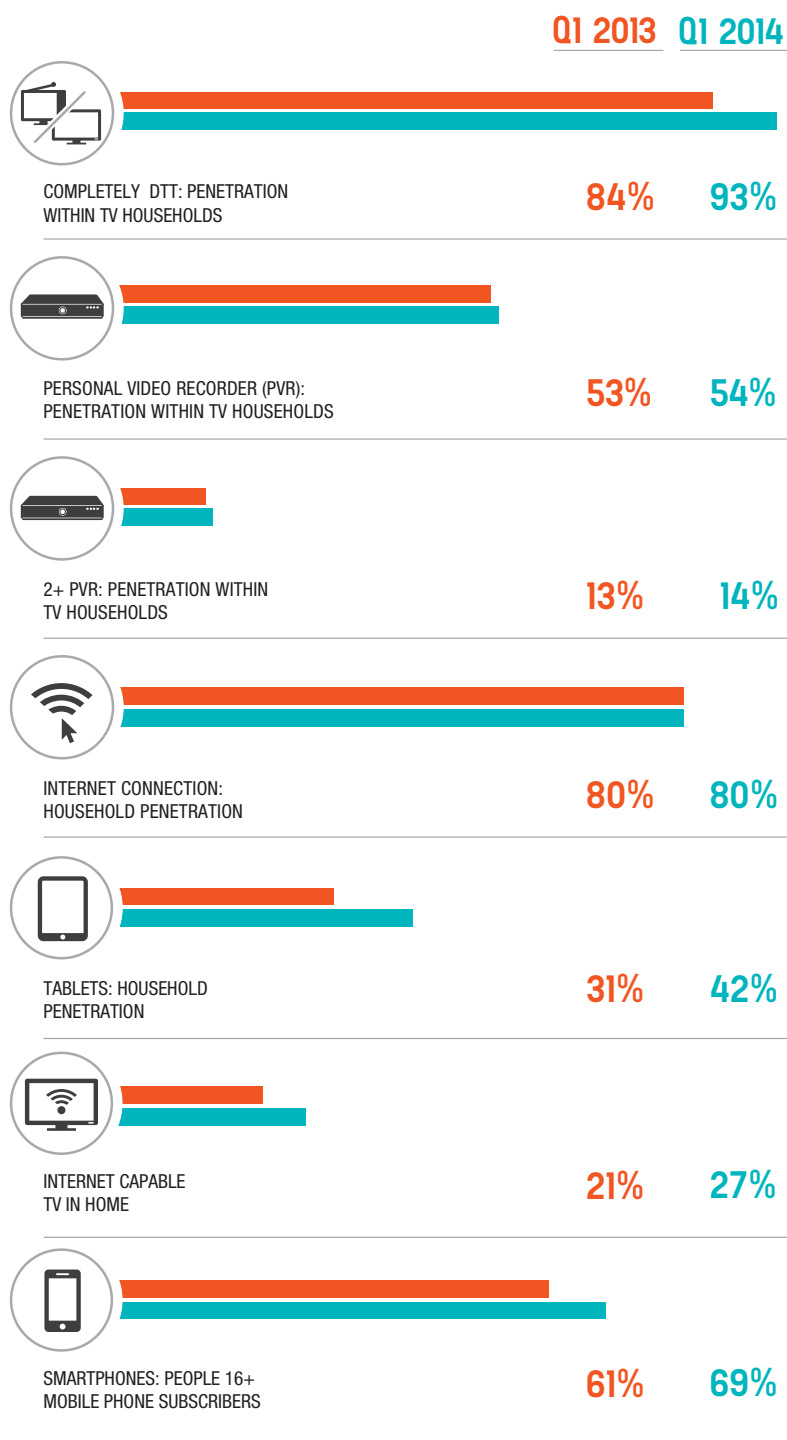
Internet capable TVs are now in 27 per cent of homes (21 per cent a year ago).

Australia's analogue terrestrial broadcast switch-off was completed at the end of 2013. So from the start of 2014, Australian television homes could access digital terrestrial broadcast (DTT) channels on at least one household TV set. By the end of Q1 2014, 93 per cent could access DTT channels on all working sets in the home.

PVR penetration is stable year-on-year at 54 per cent of homes. 14 per cent have two or more PVRs.

Four in five (80 per cent) of homes have an internet connection, consistent with the previous four quarters.

TECHNOLOGY PENETRATION



VIEWING ON TELEVISIONS AND OTHER DEVICES

The vast majority of Australians continue to watch TV at home and live.

In Q1 2014 people viewed an average 93 hours and 16 minutes (93:16) each month of broadcast television on household TV sets – up 37 minutes on the same quarter a year ago.

Age groups watching more broadcast TV year-on-year include children under 13 (an additional 3:29); 18-24s (+44 minutes); 35-49s (+57 minutes); and people aged 65 and over (+11 minutes).

92.2 per cent of all TV viewing was live-to-air ('Live'), with 7.8 per cent (7:15) 'Playback', that is, viewing of TV content that people record and watch at normal speed within seven days of original broadcast.

Most age groups increased their Playback viewing

time year-on-year, with Australians on average spending 27 minutes more each month doing so in Q1 2014 than in Q1 2013.

Australians spent 7:48 per month in the quarter viewing video online on a PC or laptop (e.g., streamed video such as internet-delivered catch up TV as well as other content)¹.

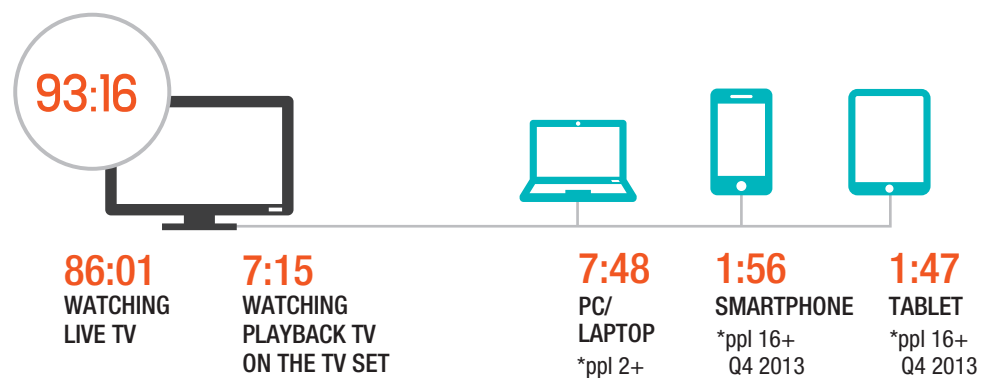
Across the Australian population aged 16 and over, people claim to spend 1:56 per month watching any online video on a mobile phone and 1:47 on tablets.²



¹ Nielsen Online Ratings – Hybrid Streaming

² Nielsen Australian Connected Consumers Report 2014. Q4 2013.

VIDEO VIEWING, AVERAGE TIME SPENT PER MONTH, TV / PC / SMARTPHONE / TABLET



SIMULTANEOUS SCREEN USE

Australians' steady take-up of online devices such as laptop computers, tablets and smartphones sees a growing number of people use these technologies to 'multi-task'.

Doing more than one thing while watching television is not new: in pre-internet times people would sometimes read magazines, newspapers or speak on a landline telephone while watching television.

Today however online devices are in many cases being used as a complementary screen by the person watching TV. Nielsen's annual Australian Connected Consumer report shows 74 per cent of online Australians aged 16+ say they ever watch TV and use the internet simultaneously – the same as a year earlier and compared to 60 per cent claiming to ever do so in 2011.

67 per cent of online Australians say they do so at least once a month, and 8 per cent report doing so less frequently.

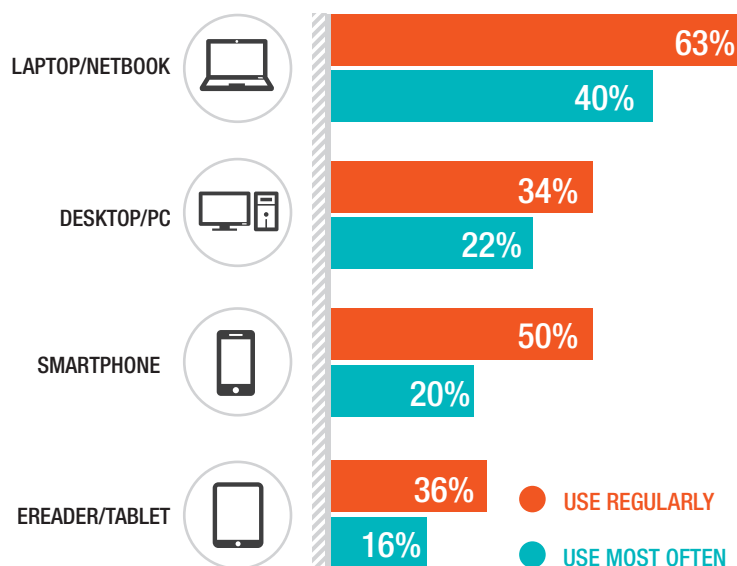
Women are slightly more inclined to multi-task than men: 76 per cent of online women aged 16+ claim to ever do so compared to 73 per cent of men.

Across the population people who multi-task say they most often use their laptop/notebook computers for this activity, followed by desktop computers, mobile phones and then tablets, reflecting relative household ownership rates of these technologies.

74%

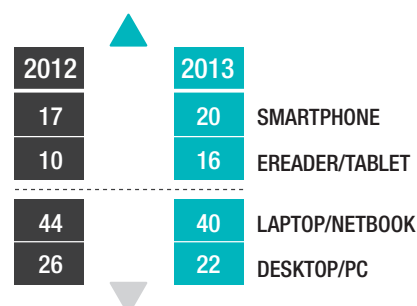
of online Australians ever simultaneously consume TV + internet

Other devices such as portable media players, games consoles, and internet-enabled TVs are used to multi-task but to a lesser extent



USE MOST OFTEN

Laptops and desktops are still dominant but mobile devices are growing in popularity



Connected devices put the world at a user's fingertips, and it's therefore not surprising that Australians primarily use their laptops/desktops and tablets for conducting searches and email. The top online activities people use their mobile phones for are getting weather or map/directional information.

The differing behaviour on computers/tablets and mobile phones is, naturally, reflective of the devices themselves: as people take mobile phones with them on the go it makes sense they are used for tasks such as getting directions, while tablets are more widely used in the home and therefore more like a traditional computer.

TOP ACTIVITY BY DEVICE

TOTAL PEOPLE

DESKTOP/LAPTOP	SMARTPHONE	TABLET
<ul style="list-style-type: none"> 1 Email 2 Conducting a search (i.e. search engine) 3 Banking/bill payment 4 Researching products/services/businesses = 5 Accessing government services/government-related information = 5 News 7 Weather = 8 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) = 8 Travel/transport information 10 Maps/directions 11 Watching online video 	<ul style="list-style-type: none"> = 1 Maps/directions = 1 Weather 3 Email 4 Conducting a search (i.e. search engine) 5 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) 6 News 7 Travel/transport information 8 Banking/bill payment 9 Researching products/services/businesses 10 Sporting news/information/results = 11 Listening to streamed/downloaded music or radio = 11 Watching online video 	<ul style="list-style-type: none"> 1 Conducting a search (i.e. search engine) 2 Email 3 News 4 Weather = 5 Researching products/services/businesses = 5 Maps/directions 7 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) 8 Watching online video = 9 Sporting news/information/results = 9 Travel/transport information

EVOLVING VIEWING PATTERNS BY AGE GROUP

This release of the Australian Multi-Screen Report explores the changing viewing patterns of people within the main age groups to provide a more holistic picture of their multi-screen use.

Examining Total TV Screen Usage across the day for each age group, as well as their viewing on other devices, provides an opportunity to reconsider some commonly held beliefs about Australians' TV habits.

For example, while people 50+ are more likely to watch TV on a television set than younger Australians, the

decline among under-24s is less dramatic than is often implied. In fact, children under 13 and 18-24s actually increased their TV viewing on television sets in Q1 2014 compared to the same period a year earlier.

And although 18-24s are the heaviest viewers of video on connected devices, their older counterparts are more technologically savvy than often given credit for.



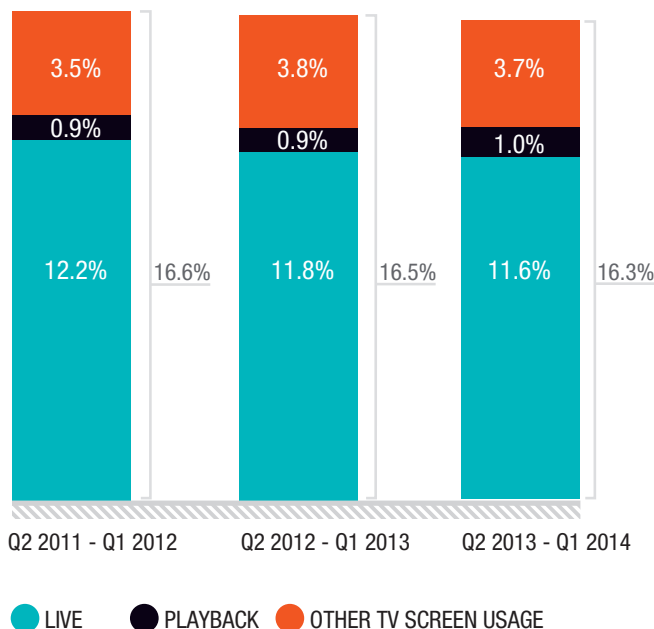
TOTAL PEOPLE

As seen in earlier editions of the Multi-Screen Report, Australians' total use of the TV set is consistent year-on-year [averaging out at 16.3 TARP across the whole day (Q2 2013 – Q1 2014)]. The way people use their TV sets is changing however as they progressively attach new devices to the TV set (e.g., games consoles, PVRs and over-the-top internet-delivered services) and also as take-up of internet capable televisions grows.

Across the 12 months through Q1 2014 Playback viewing continued to rise, offsetting a slight decline in Live viewing.

TARP - TOTAL INDIVIDUALS

TOTAL TV SCREEN USAGE



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 Q2 2013 – Q1 2014 (far right bar, left) an estimated 16.3 per cent of Australians were using their in-home TV screens.

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

The time people spend using their TV screens – both for watching Live and Playback television and also pursuing Other Screen activities – has risen year-on-year.

MONTHLY TIME SPENT (HH:MM)

TOTAL INDIVIDUALS

	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
Watching TV in the home³	92:39	96:37	95:51	92:39	93:16
Watching Live TV	85:51	88:51	88:41	85:52	86:01
Watching Playback * TV	6:48	7:46	7:10	6:47	7:15
Total TV Screen Usage	120:33	124:40	123:27	121:16	122:15
Watching Live TV	85:51	88:51	88:41	85:52	86:01
Watching Playback ^ TV	6:59	7:54	7:19	6:51	7:25
Other Screen Usage	27:43	27:55	27:27	28:33	28:49

* Playback **What** Watched TV

^ Playback **When** Watched TV

Explaining What Watched and When Watched

'Total TV Screen Usage' – as detailed in the Monthly Time Spent table above and used in the Shape of The Day diagrams – does not equal the sum of 'Watching TV in the home' and 'Total Other Screen Usage' because the Playback base is different. 'Total TV Screen Usage' = Live + **Playback when watched** (i.e., Playback within seven days at the time it is actually viewed) + 'Total Other Screen Usage'. Watching TV in the home = Live + **Playback of what is watched** [i.e., viewing of recorded broadcast content within seven days is attributed back to the time at which the program actually went to air (Consolidated viewing).] For example: Program X airs on Sundays at 20.30. A viewer watches this program at midday on Tuesday. In When Watched, the Playback activity would be at midday on Tuesday. In What Watched, the Playback viewing would be attributed back to 20.30 on Sunday.

³ Source: Combined OzTAM Metro and Regional TAM databases with overlap homes de-duplicated. Average time spent viewing (ATV 0200-2600). 'Watching TV' and 'Watching Playback TV' are both based on Consolidated data. Playback viewing is up to 7 days after broadcast. Please note television viewing is seasonal, with people watching more television in the winter months and with the end of daylight saving time.



As the following 'Shape of the Day' diagrams illustrate, people's television use varies across the day, building from early morning to an evening peak.

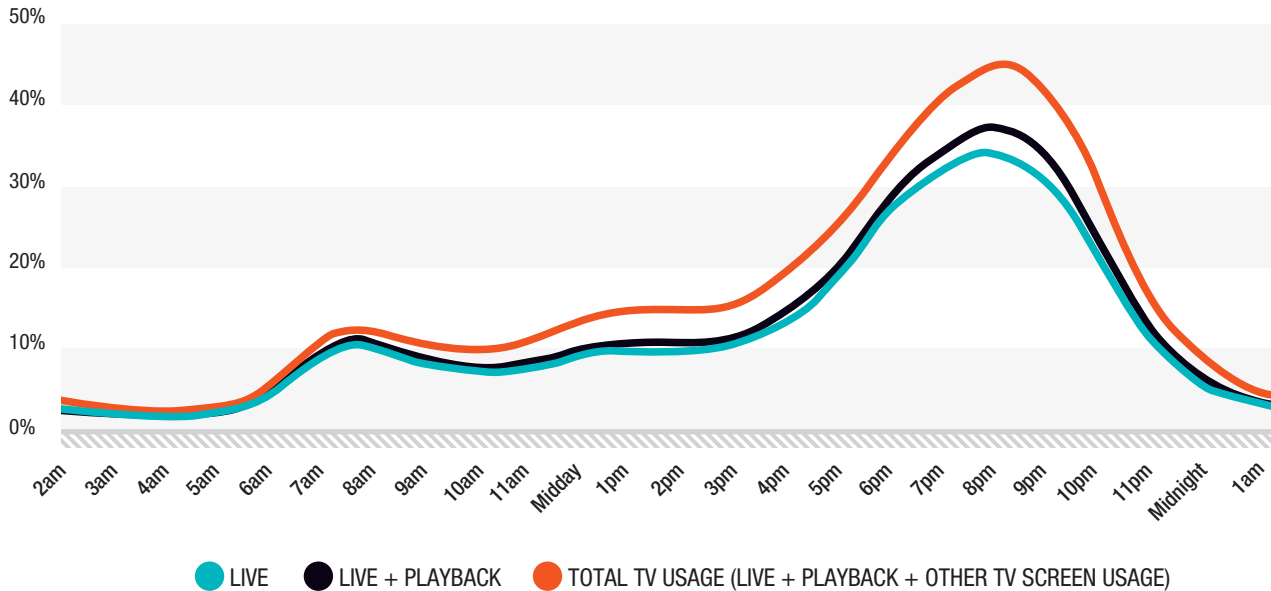
Playback viewing and Other TV Screen Usage (for example, using the TV for online browsing, gaming, watching DVDs or recorded TV content beyond seven days from original broadcast) rise steadily throughout the day to the

traditional prime time period, with Live viewing driving breakfast time to mid-morning TV use in particular.

As people are more likely to be at home on weekend afternoons than during the week, they use their televisions more at this time, with proportionally greater time devoted to Other TV Screen uses.

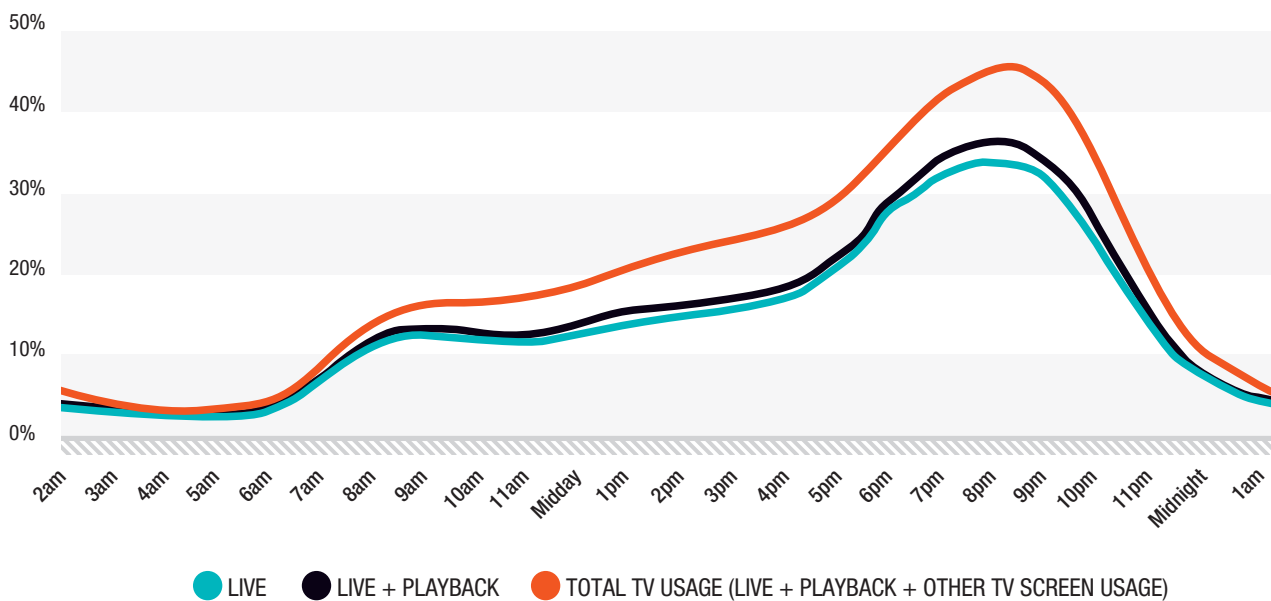
TOTAL TV SCREEN USAGE - SHAPE OF THE DAY

TOTAL INDIVIDUALS TARP - WEEKDAYS [MONDAY TO FRIDAY]



TOTAL TV SCREEN USAGE - SHAPE OF THE DAY

TOTAL INDIVIDUALS TARP - WEEKENDS [SATURDAY AND SUNDAY]



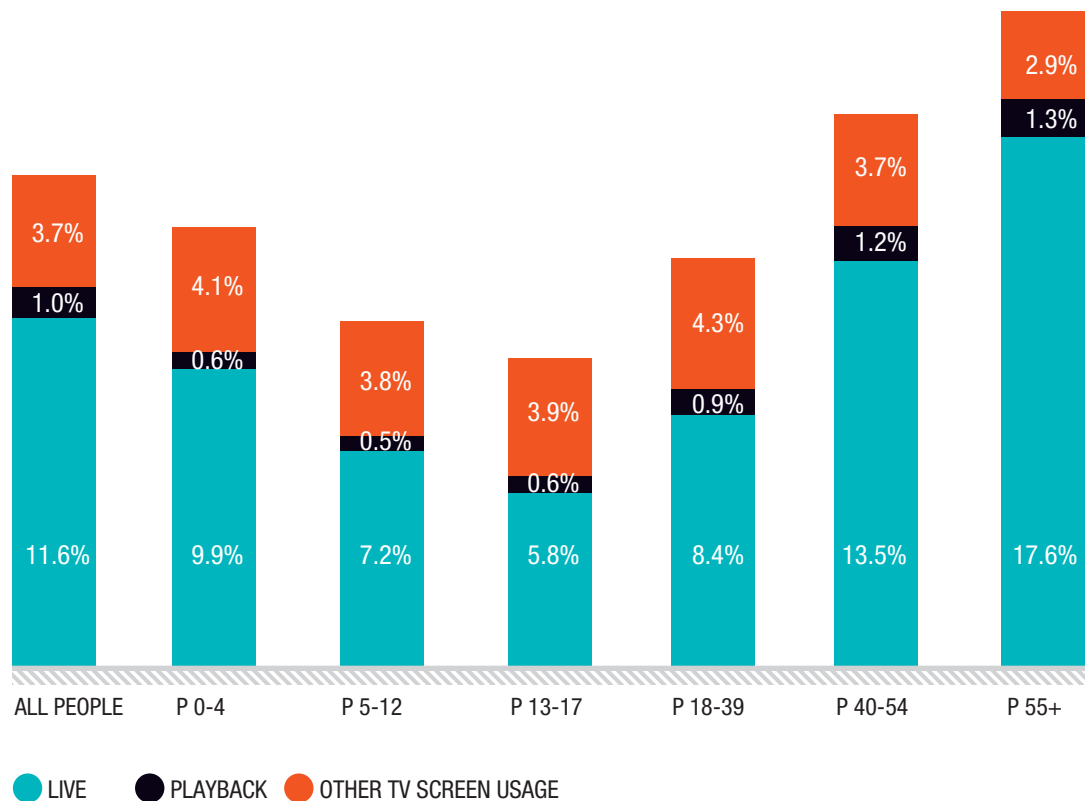
A CLOSER LOOK AT SPECIFIC AGE GROUPS

As mentioned earlier in this report, the way Australians use their TV screens is changing as new technologies attached to the television set become more prevalent in homes. What's more, different age groups use their television sets differently at different times of day.

The following sections take a closer look at Total TV Screen Usage, as well as online activities on computers, tablets and smartphones, among major age groups.

TOTAL TV SCREEN USAGE

TARP BY DEMOGRAPHICS - Q2 2013 TO Q1 2014



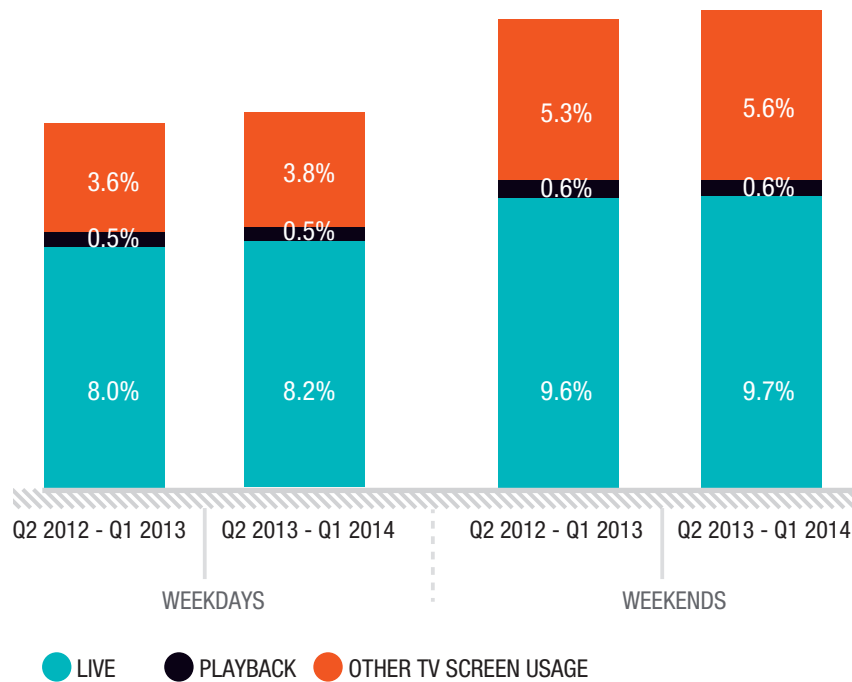
KIDS

Kids are more likely to use their TV sets for Other Uses than the population as a whole yet also spend about two thirds of their TV screen time watching Live TV – on average 65:06 per month, up 3:29 since Q1 2013 (see Tables 4 and 4a at the end of the report for detail.)

In addition to watching more Live and Playback TV year-on-year kids also increased their Other Screen Usage, significantly boosting their Total Screen Usage in the period.

TOTAL TV SCREEN USAGE

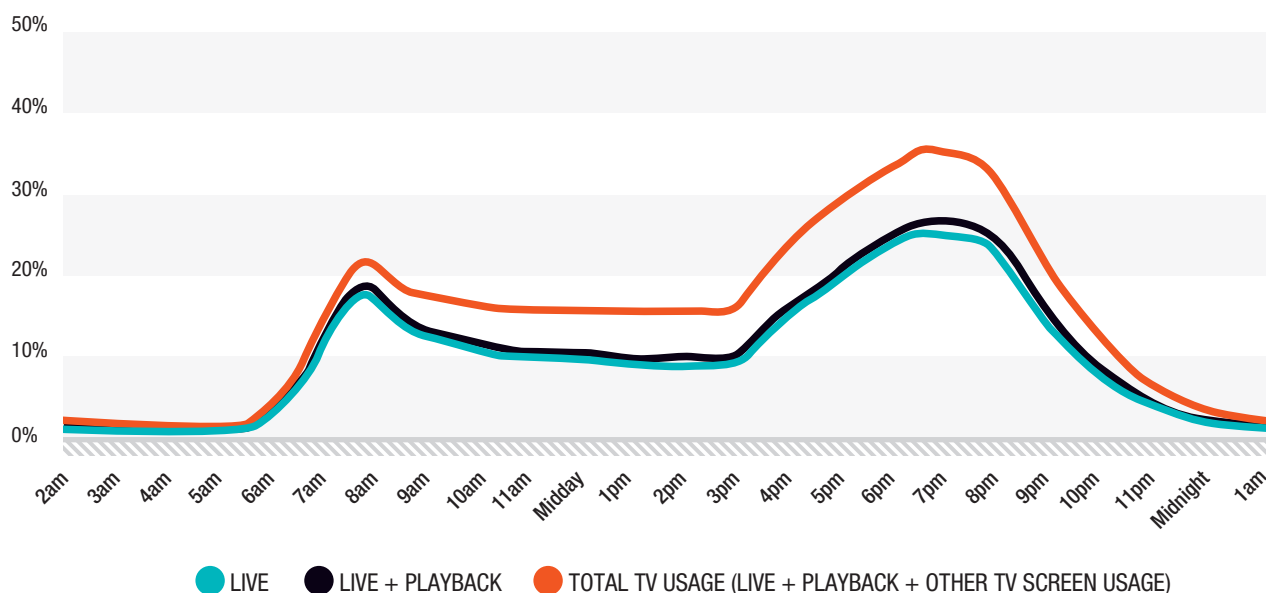
TARP PEOPLE 0-12



NOTE: Tablet/smartphone viewing data is only for ppl 16+; PC viewing for ppl 2+

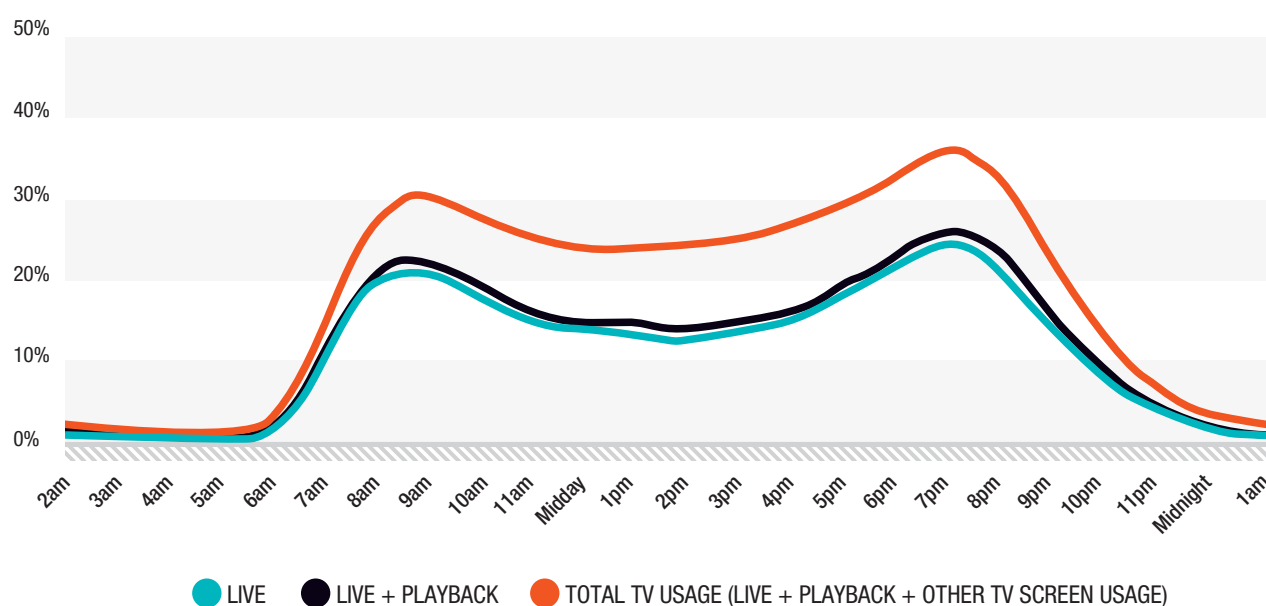
TOTAL TV SCREEN USAGE - SHAPE OF THE DAY

KIDS [0-12] TARP - WEEKDAYS [MONDAY TO FRIDAY]



TOTAL TV SCREEN USAGE - SHAPE OF THE DAY

KIDS [0-12] TARP - WEEKENDS [SATURDAY AND SUNDAY]



TEENS

Compared to other age groups, teens use their TV screens proportionately more for other uses – such as gaming, online activities on the TV, and Playback beyond the seven-day Consolidated viewing window.

Teens' Total Use of the television screen slightly fell year on year; while their Playback activity was constant, Live viewing and Other Screen Usage dipped, particularly on weekends.

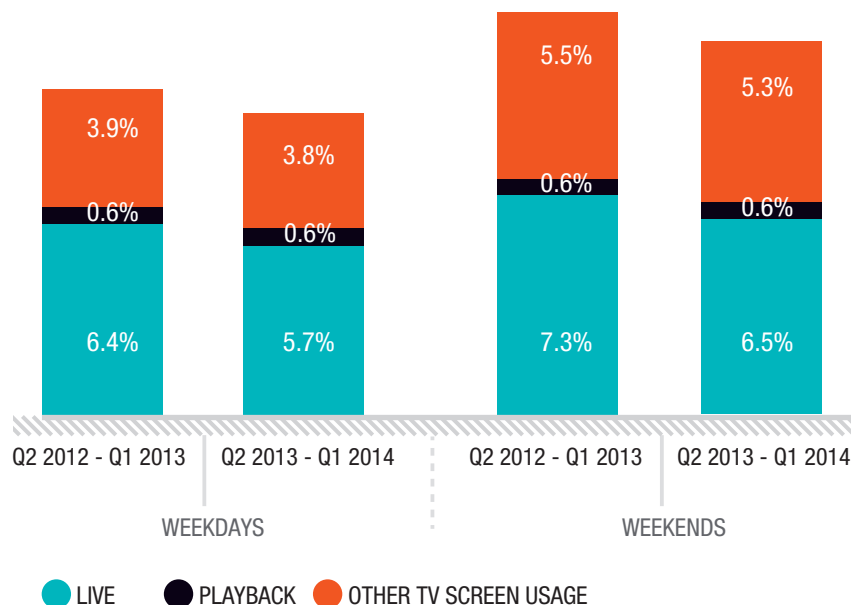
Teens however still spend the majority of their time with the TV screen watching broadcast television.

Teens' use of the TV screen for purposes other than watching Live and Playback TV is proportionally greatest in the afternoons, both on weekdays and weekends.



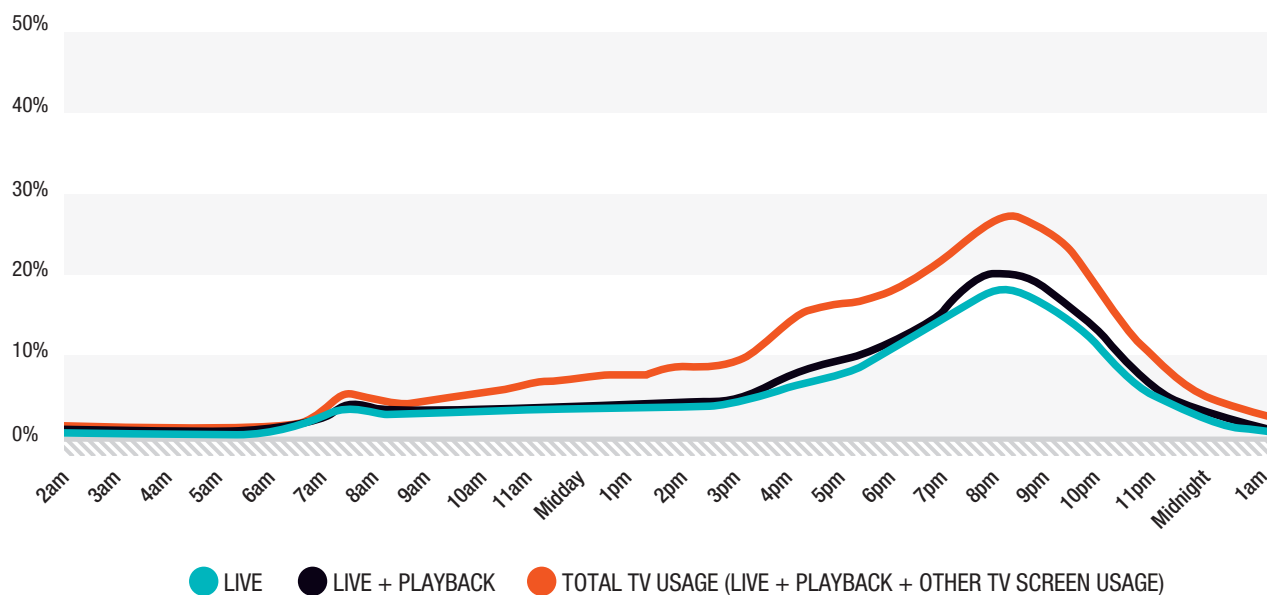
TOTAL TV SCREEN USAGE

TARP TEENS [13-17]



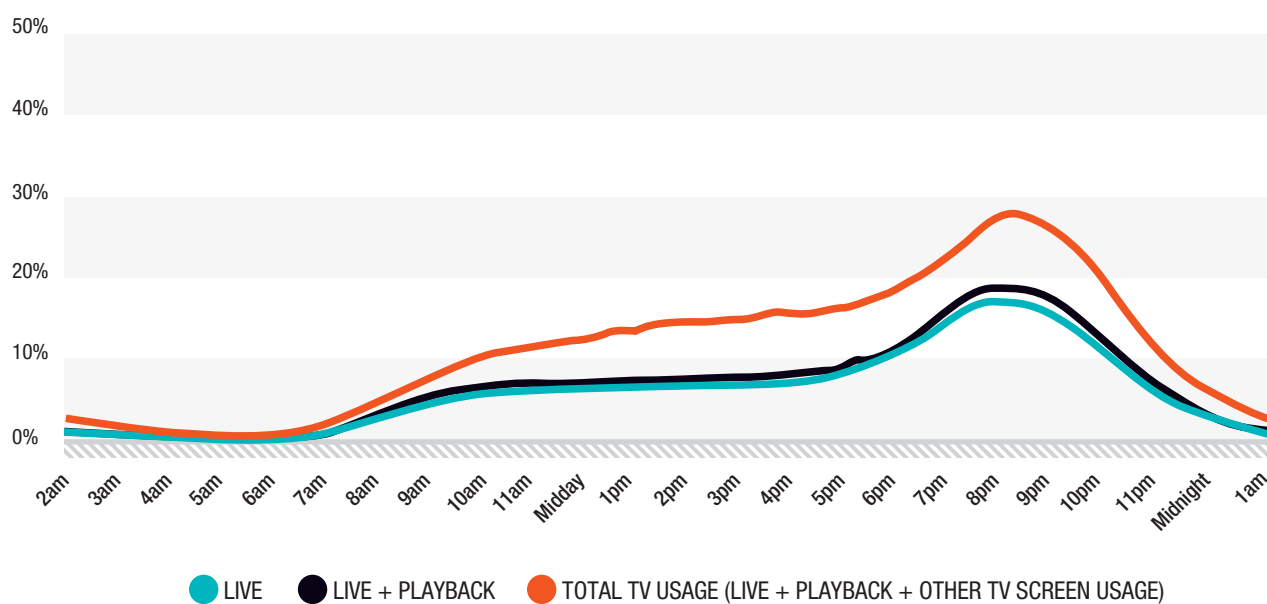
TOTAL TV SCREEN USAGE - SHAPE OF THE DAY

TEENS [13-17] TARP - WEEKDAYS [MONDAY TO FRIDAY]



TOTAL TV SCREEN USAGE - SHAPE OF THE DAY

TEENS [13-17] TARP - WEEKENDS [SATURDAY AND SUNDAY]

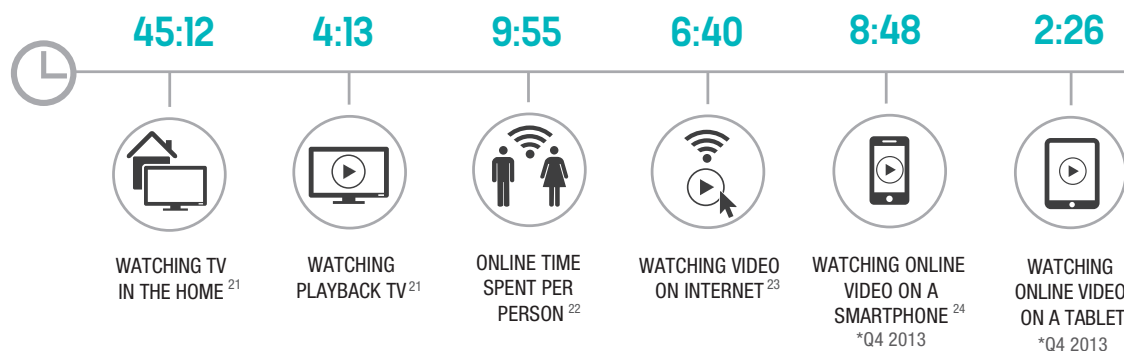


MONTH IN A LIFE

TV/ PLAYBACK/ ONLINE/ VIDEO ON INTERNET/ VIDEO ON SMARTPHONE/ VIDEO ON TABLET

TEENS

Relative to other age groups, teens report the most amount of time watching video on mobile phones, at 8:48 per month, and claim to spend 2:26 per month viewing video on tablets (Q4 2013).



Nielsen's Australian Connected Consumer report 2014 shows people aged 16-17, along with 25-34s, have the greatest tendency of all online Australians to multi-task. 89 per cent of online 16-17 year-olds report ever doing so, with 82 per cent claiming to do so at least monthly. By comparison, 87 per cent of online 18-24 year-olds, and 74 per cent across the online population as a whole, say they have ever multi-tasked.

16-17s say they most often use their mobile phones when multi-tasking, followed by laptop computers and tablets.

Conducting a search is the number one online activity they undertake on their smartphones, with accessing weather information, email, social media or directions closely behind.

16-17 year-olds say social media is the online activity they most often use tablets for, followed by email. They use laptop and desktop computers primarily for search and email.

Watching online video is their fourth most common activity on computers, sixth on tablets and tenth on smartphones.

TOP 10 PC/ SMARTPHONE/ TABLET ACTIVITIES FOR TEENS

DESKTOP/LAPTOP	SMARTPHONE	TABLET
<ol style="list-style-type: none"> 1 Conducting a search (i.e. search engine) 2 Email 3 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) 4 Watching online video 5 Researching products/services/businesses = 6 Connecting with/interacting with organisations or companies via social media sites = 6 Listening to streamed/downloaded music or radio 8 Interacting with others/posting comments or reading other people's comments about TV programs (incl sport) or movies as you are watching them or those you had watched recently 9 Accessing government services/government-related information 10 Travel/transport information 	<ol style="list-style-type: none"> 1 Conducting a search (i.e. search engine) 2 Weather = 3 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) = 3 Email 5 Maps/directions = 6 Connecting with/interacting with organisations or companies via social media sites = 6 News 8 Travel/transport information 9 Listening to streamed/downloaded music or radio 10 Watching online video 	<ol style="list-style-type: none"> 1 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) 2 Email = 3 Conducting a search (i.e. search engine) = 3 Connecting with/interacting with organisations or companies via social media sites 5 Weather = 6 News = 6 Watching online video 8 Interacting with others/posting comments or reading other people's comments about TV programs (incl sport) or movies as you are watching them or those you had watched recently 9 Researching products/services/businesses 10 Listening to streamed/downloaded music or radio

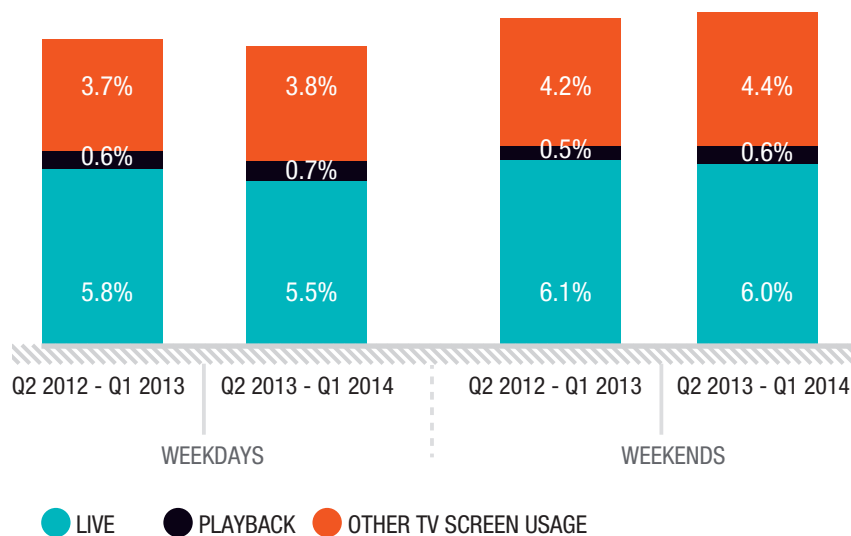
18-24s

Although 18-24s are among the lightest TV viewers they spent 44 minutes more per month watching TV in the quarter than they did a year ago (viewing on average 45:14 per month in the quarter). Across the year to Q1 2014, their Total Use of the television set was constant, with an increase in Playback viewing offsetting a slight decline in Live viewing.

While Live TV drives 18-24s' evening viewing, they spend nearly equal amounts of time watching Live TV and using the TV screen for Other purposes in the afternoons on both weekdays and weekends.

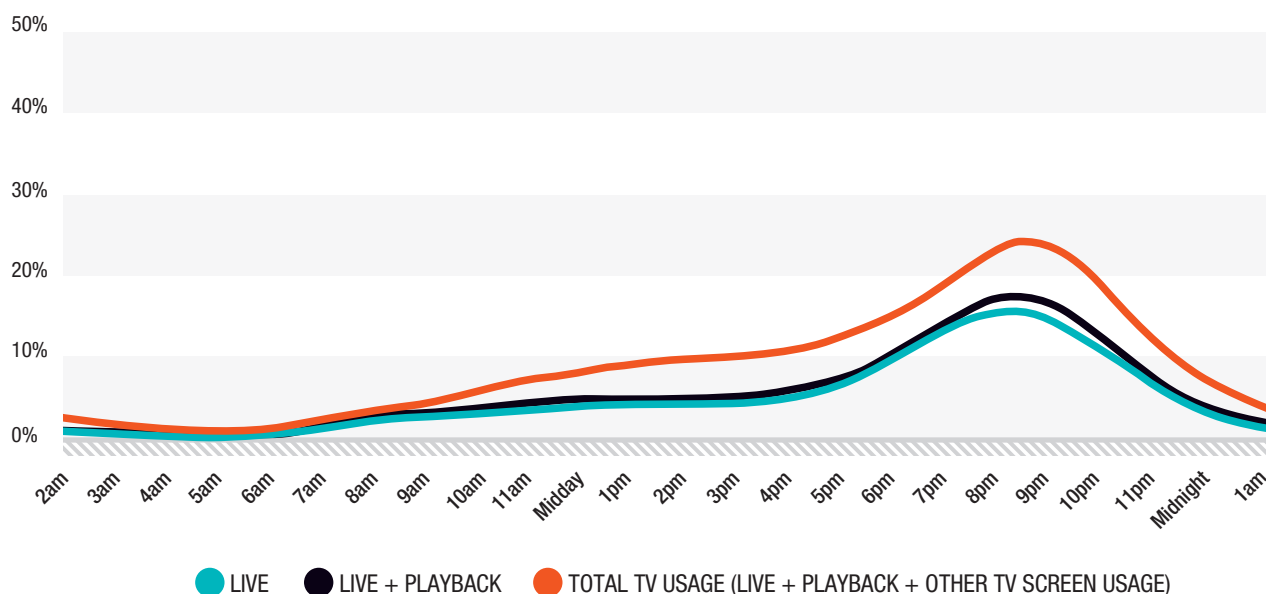
TOTAL TV SCREEN USAGE

TARP PEOPLE 18-24



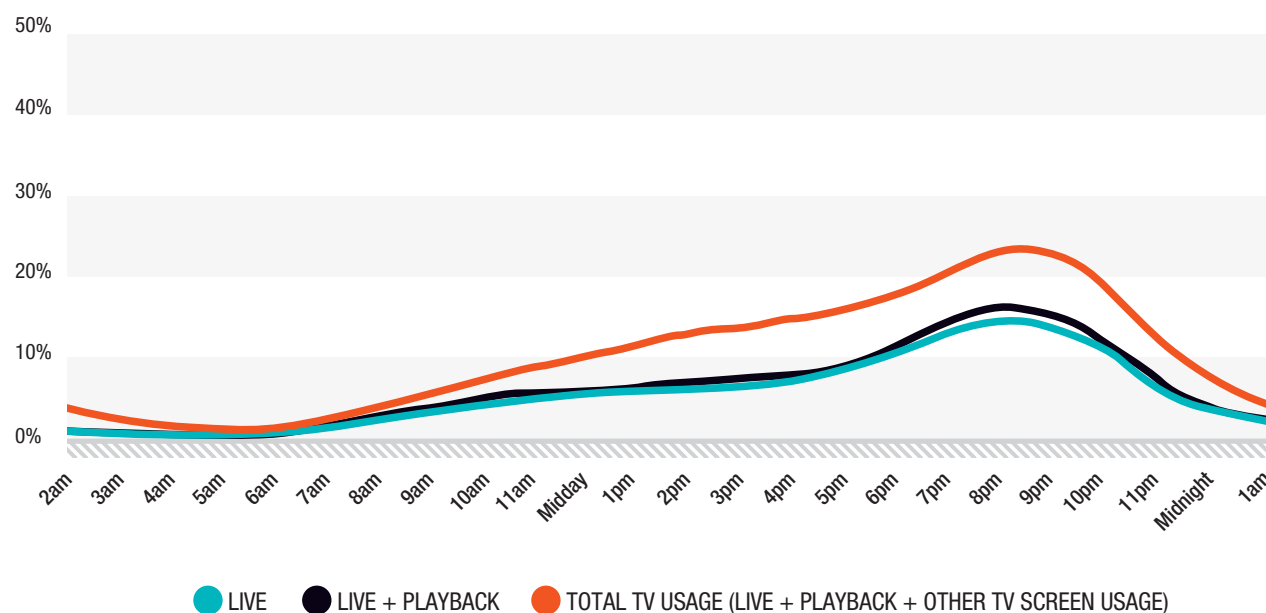
TOTAL TV SCREEN USAGE - SHAPE OF THE DAY

PEOPLE 18-24 TARP - WEEKDAYS [MONDAY TO FRIDAY]



TOTAL TV SCREEN USAGE - SHAPE OF THE DAY

PEOPLE 18-24 TARP - WEEKENDS [SATURDAY AND SUNDAY]





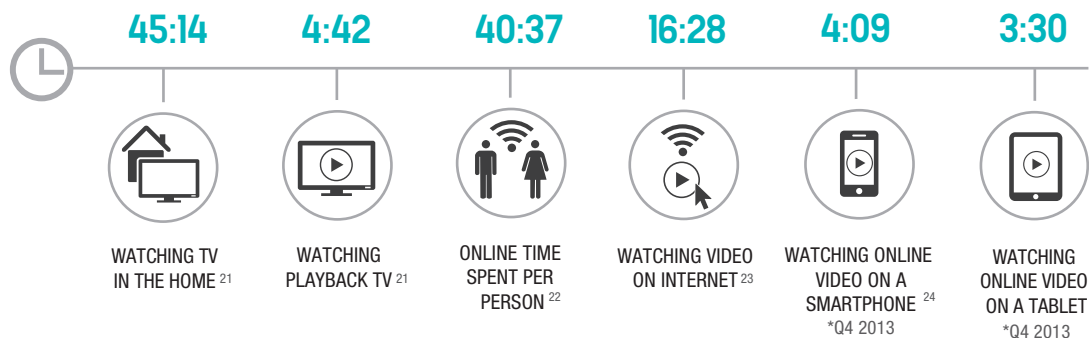
MONTH IN A LIFE

TV/ PLAYBACK/ ONLINE/ VIDEO ON INTERNET/ VIDEO ON SMARTPHONE/ VIDEO ON TABLET

18-24s

18-24s spend the most time in aggregate of any age group watching TV and other video on new devices (PC/laptops, plus their claimed viewing on tablets and mobiles): 24:07 per month across these screens compared to 45:14 watching TV on conventional sets.

This reflects both their life stage and their tendency to be early adopters of new technologies.



87 per cent of online 18-24s report ever multi-tasking, just behind younger teens and 25-34s (who report 89 per cent each).

18-24s say they use their mobile phones and laptops most often to multi-task, followed by desktops and then tablets.

Getting directions/maps and email are

their most common online activities on mobile phones; they use tablets and computers most often for search and email.

Watching online video is 18-24s' fifth most common activity on computers, fourth on tablets and eleventh on mobile phones.

TOP 10 PC/ SMARTPHONE/ TABLET ACTIVITIES FOR 18-24s

DESKTOP/LAPTOP	SMARTPHONE	TABLET
<ol style="list-style-type: none"> 1 Conducting a search (i.e. search engine) 2 Email 3 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) 4 Researching products/services/businesses 5 Watching online video 6 Banking/bill payment 7 News 8 Listening to streamed/downloaded music or radio 9 Accessing government services/government-related information 10 Connecting with/interacting with organisations or companies via social media sites 	<ol style="list-style-type: none"> 1 Maps/directions 2 Email 3 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) = 4 Conducting a search (i.e. search engine) = 4 Weather 6 Travel/transport information 7 Banking/bill payment 8 News = 9 Connecting with/interacting with organisations or companies via social media sites = 9 Interacting with others/posting comments or reading other people's comments about TV programs (incl sport) or movies as you are watching them or those you had watched recently 	<ol style="list-style-type: none"> 1 Conducting a search (i.e. search engine) 2 Email 3 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) 4 Watching online video 5 News = 6 Weather = 6 Researching products/services/businesses = 8 Banking/bill payment = 8 Travel/transport information = 8 Maps/directions = 8 Connecting with/interacting with organisations or companies via social media sites = 8 Interacting with others/posting comments or reading other people's comments about TV programs (incl sport) or movies as you are watching them or those you had watched recently

25-34s

Australians aged 25-34 spent an average of 74:21 per month watching TV in the home in Q1 2014.

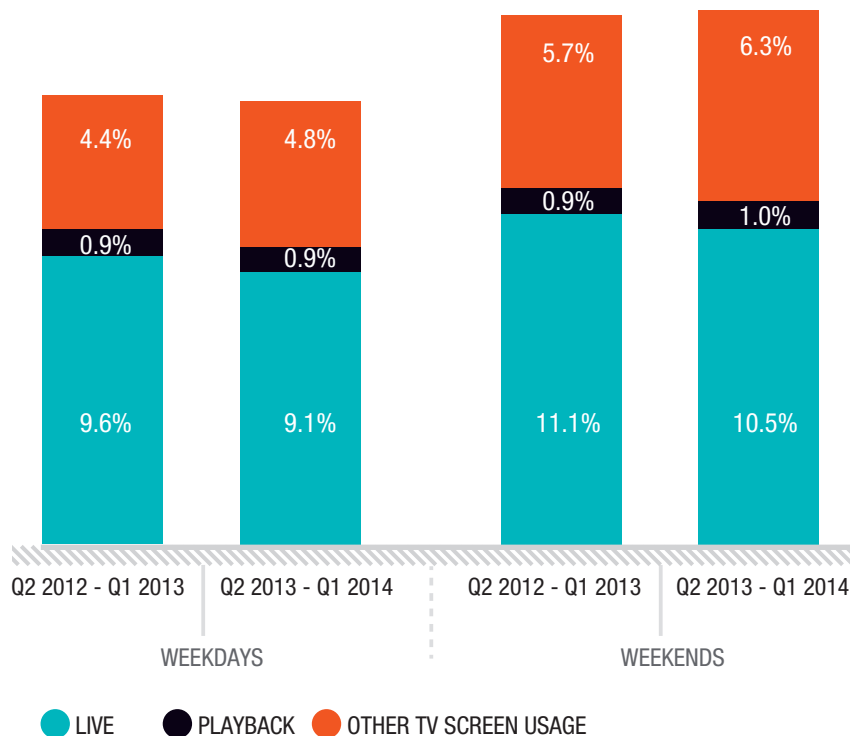
Similar to most other age groups, 25-34s increased their Playback viewing year-on-year, watching an average 6:56 per month in Q1 2014 compared to Q1 2013 (an additional 50 minutes each month; see Tables 4 and 4a at the end of the report for details).

Across the year to Q1 2014, 25-34s' Total Use of the television set was constant, with a growing amount of time spent on Other Screen Usage.

Live TV viewing dominates 25-34s' Total TV Screen use across the day, with Other Screen Usage peaking in prime time. Their Other Screen Usage is most pronounced on weekend afternoons.

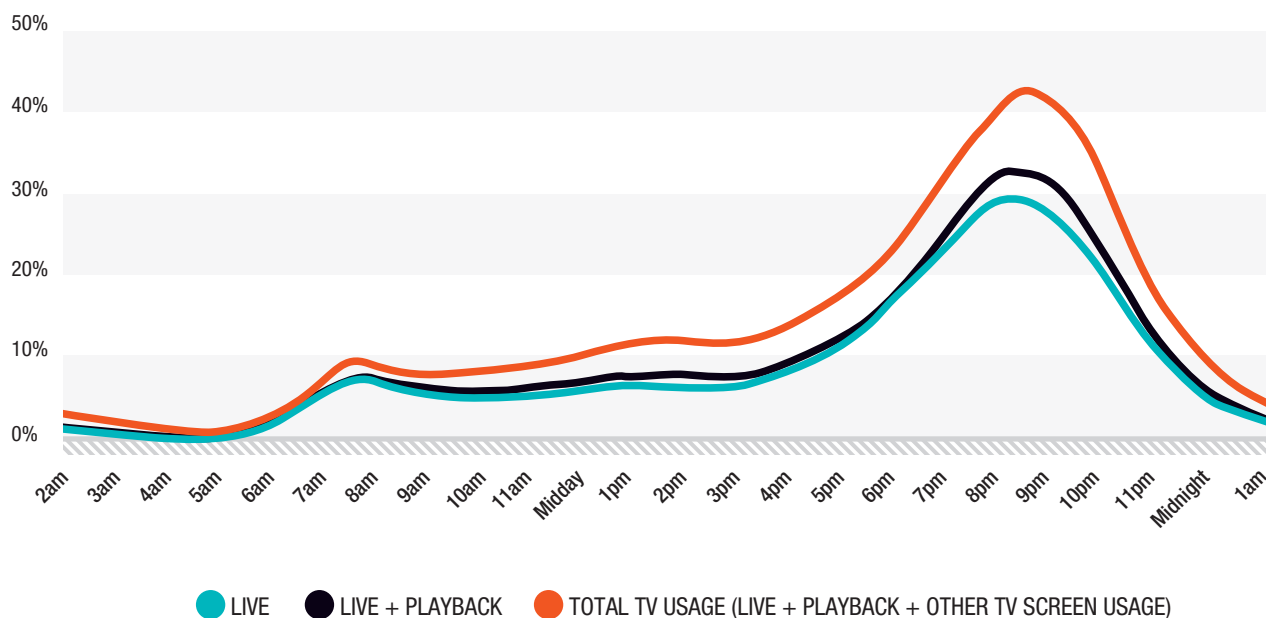
TOTAL TV SCREEN USAGE

TARP PEOPLE 25-34



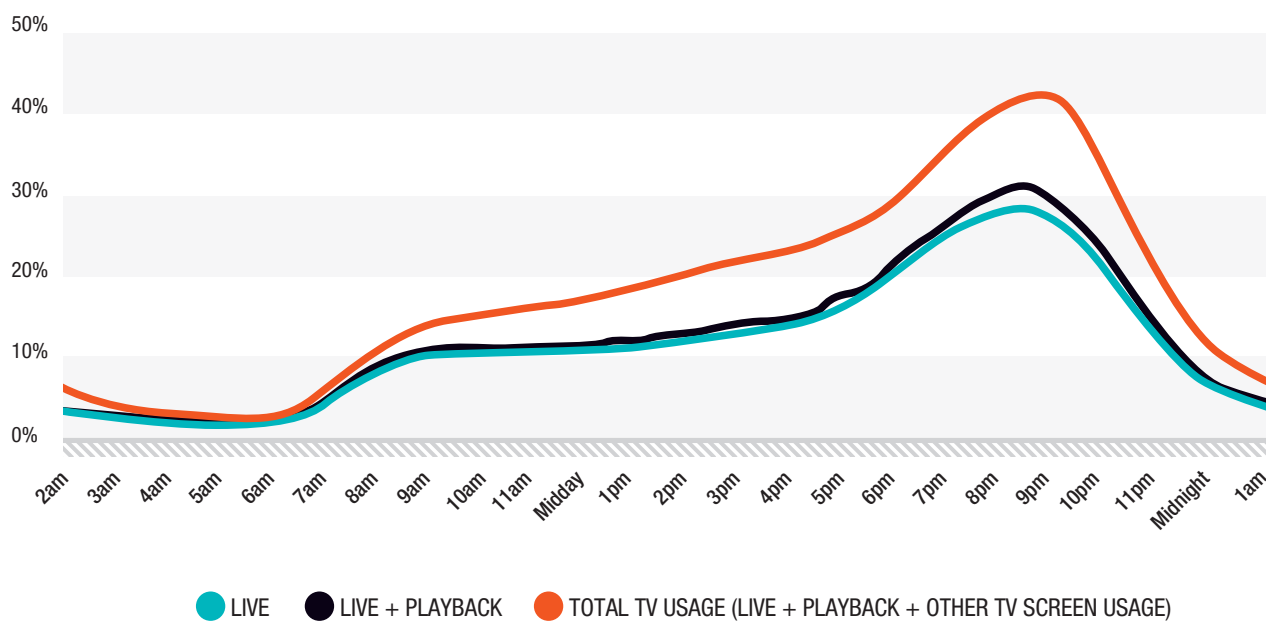
TOTAL TV SCREEN USAGE - SHAPE OF THE DAY

PEOPLE 25-34 TARP - WEEKDAYS [MONDAY TO FRIDAY]



TOTAL TV SCREEN USAGE - SHAPE OF THE DAY

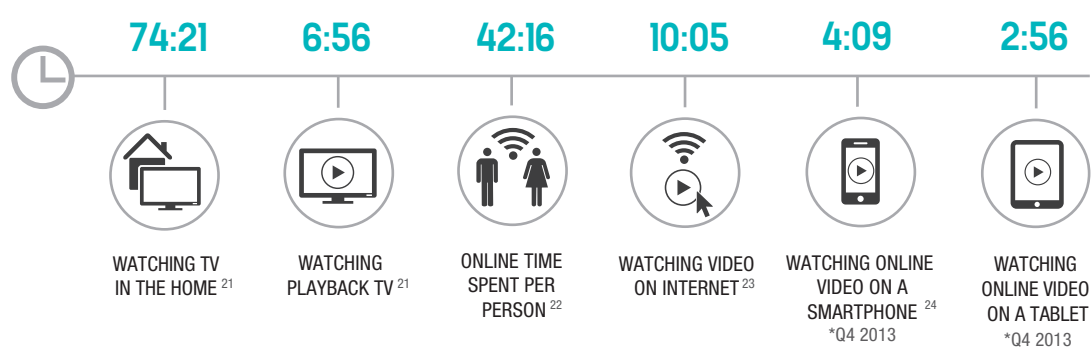
PEOPLE 25-34 TARP - WEEKENDS [SATURDAY AND SUNDAY]



MONTH IN A LIFE

TV/ PLAYBACK/ ONLINE/ VIDEO ON INTERNET/
VIDEO ON SMARTPHONE/ VIDEO ON TABLET

25-34s



As an age group 25-34 year-olds are the second-heaviest viewers of video on a PC/laptop, spending 10:05 per month doing so in Q1 2014 (16:28 for 18-24s; across the population 16+ 7:48.)

Online Australians aged 25-34 and teens are the age groups most likely to multi-task: 89 per cent of both age groups report ever doing so, slightly higher than 18-24s (87 per cent) and compared to 74 per cent across the population as a whole.

25-34s use their laptops most often for multi-tasking, followed by mobile phones, desktops and then tablets.

The top online activities for 25-34s are search and email (on computers), search, email and getting news (tablets), and checking weather, directions and email (mobile phones). While they say watching online video is their fourth most common activity on tablets, video viewing is their eighth most popular activity on desktop/laptops, and eleventh on their mobile phones.

TOP 10 PC/ SMARTPHONE/ TABLET ACTIVITIES FOR 25-34s

DESKTOP/LAPTOP	SMARTPHONE	TABLET
<ol style="list-style-type: none"> 1 Conducting a search (i.e. search engine) 2 Email 3 Banking/bill payment 4 Researching products/services/businesses 5 News 6 Accessing government services/government-related information 7 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) 8 Watching online video 9 Maps/directions 10 Weather 	<ol style="list-style-type: none"> 1 Weather = 2 Email = 2 Maps/directions 4 Conducting a search (i.e. search engine) 5 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) 6 News 7 Travel/transport information = 8 Banking/bill payment = 8 Researching products/services/businesses 10 Sporting news/information/results 	<ol style="list-style-type: none"> 1 Conducting a search (i.e. search engine) = 2 Email = 2 News 4 Watching online video 5 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) = 6 Weather = 6 Researching products/services/businesses 8 Banking/bill payment 9 Maps/directions = 10 Sporting news/information/results = 10 Travel/transport information

35-49s

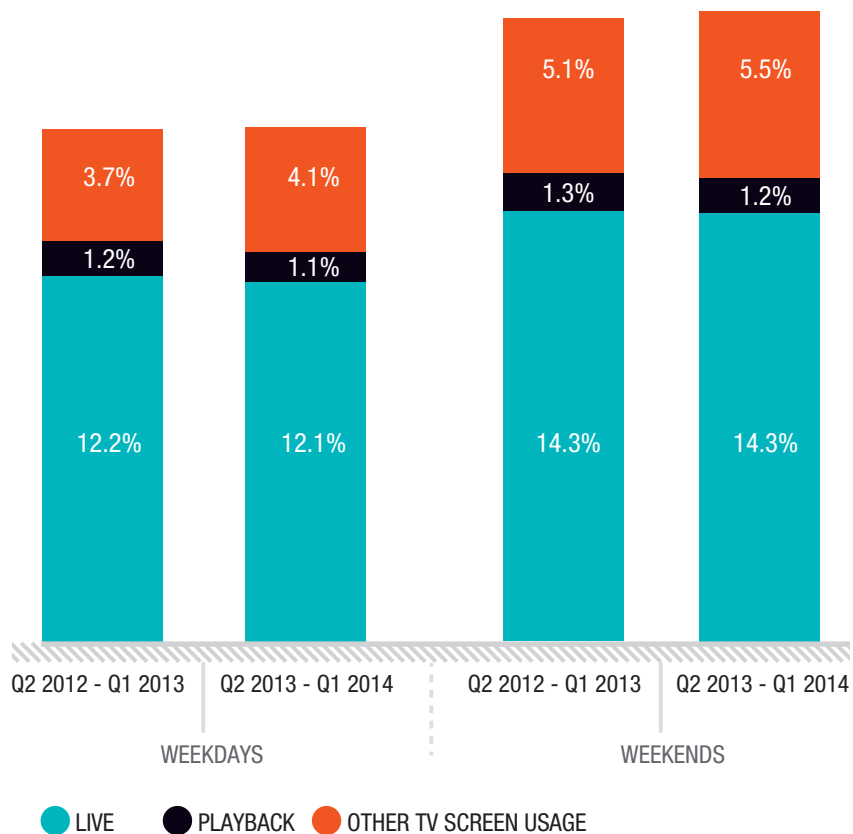
Australians aged 35-49 increased their broadcast TV viewing by 57 minutes year-on-year to 98:06 per month in Q1 2014.

Across the year to Q1 2014 their Total Use of the TV set was constant with their Other Screen Usage increasing.

Live TV viewing heavily drives 35-49s' overall use of the TV screen during the week, with proportionately more of their time with the TV set devoted to Other Screen Usage on weekend afternoons and evenings in particular.

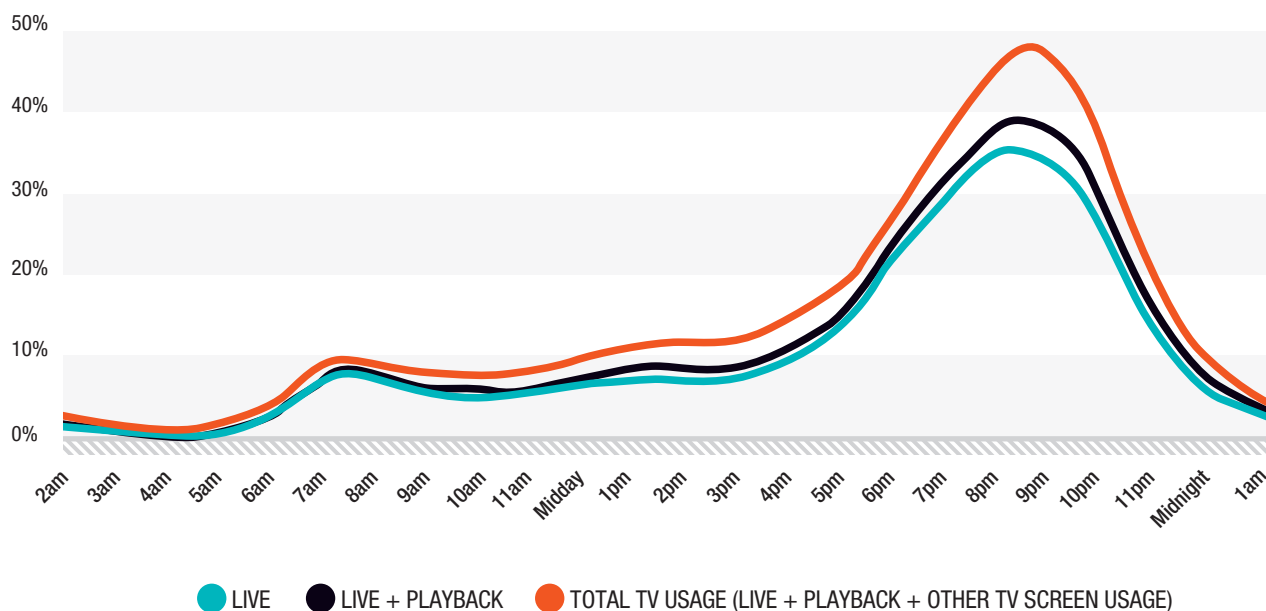
TOTAL TV SCREEN USAGE

TARP PEOPLE 35-49



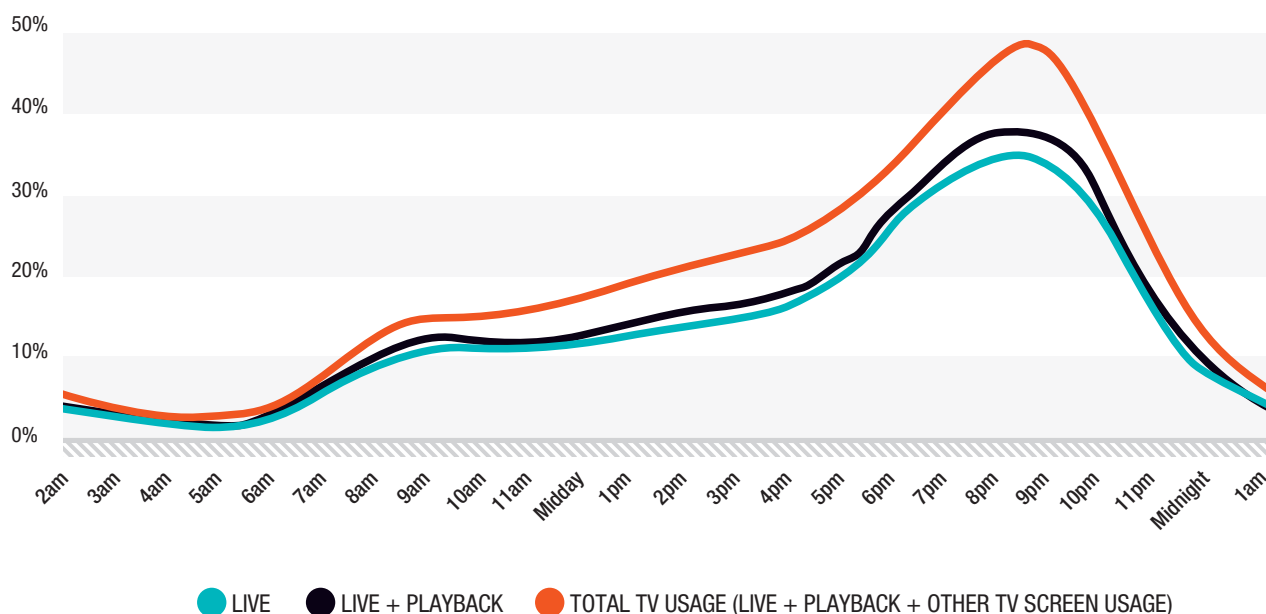
TOTAL TV SCREEN USAGE - SHAPE OF THE DAY

PEOPLE 35-49 TARP - WEEKDAYS [MONDAY TO FRIDAY]



TOTAL TV SCREEN USAGE - SHAPE OF THE DAY

PEOPLE 35-49 TARP - WEEKENDS [SATURDAY AND SUNDAY]

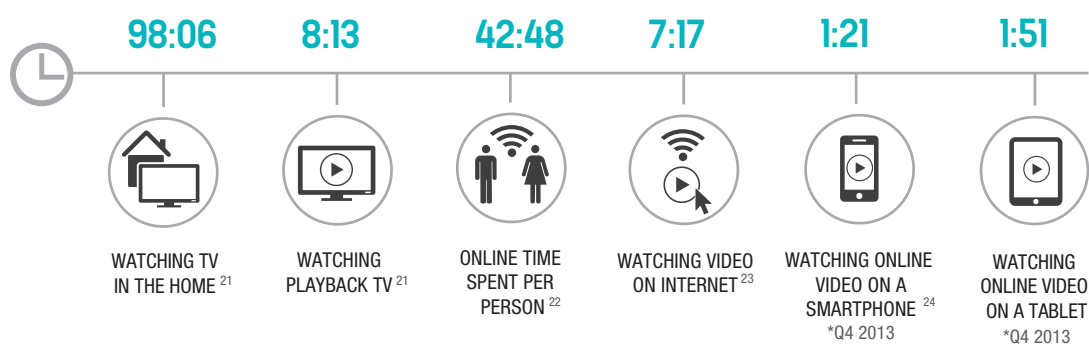


MONTH IN A LIFE

TV/ PLAYBACK/ ONLINE/ VIDEO ON INTERNET/ VIDEO ON SMARTPHONE/ VIDEO ON TABLET

35-49s

35-49s spend on average 98:06 per month watching broadcast television compared to an aggregate 10:29 watching any video on a PC/laptop, mobile phone or tablet.



81 per cent of online 35-49 year-olds say they ever multi-task, with 73 per cent claiming to do so at least once a month.

35-49s use their laptops most often to multi-task. Desktops are second, with mobile phones and tablets third.

The top online activities among 35-49s are email and search (tablets and computers), and checking weather and directions (mobile phones). Although watching online video is their seventh most-common self-reported activity on tablets, video falls outside their top ten on desktop/laptops and smartphones.

TOP 10 PC/ SMARTPHONE/ TABLET ACTIVITIES FOR 35-49s

DESKTOP/LAPTOP	SMARTPHONE	TABLET
<ul style="list-style-type: none"> 1 Email 2 Conducting a search (i.e. search engine) 3 Banking/bill payment = 4 News = 4 Researching products/services/businesses 6 Accessing government services/government-related information 7 Weather 8 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) 9 Travel/transport information 10 Maps/directions 	<ul style="list-style-type: none"> = 1 Maps/directions = 1 Weather 3 Conducting a search (i.e. search engine) 4 Email 5 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) 6 News 7 Travel/transport information = 8 Banking/bill payment = 8 Researching products/services/businesses 10 Sporting news/information/results 	<ul style="list-style-type: none"> 1 Conducting a search (i.e. search engine) = 2 Email = 2 News 4 Weather 5 Researching products/services/businesses 6 Maps/directions = 7 Watching online video = 7 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) 9 Sporting news/information/results 10 Travel/transport information

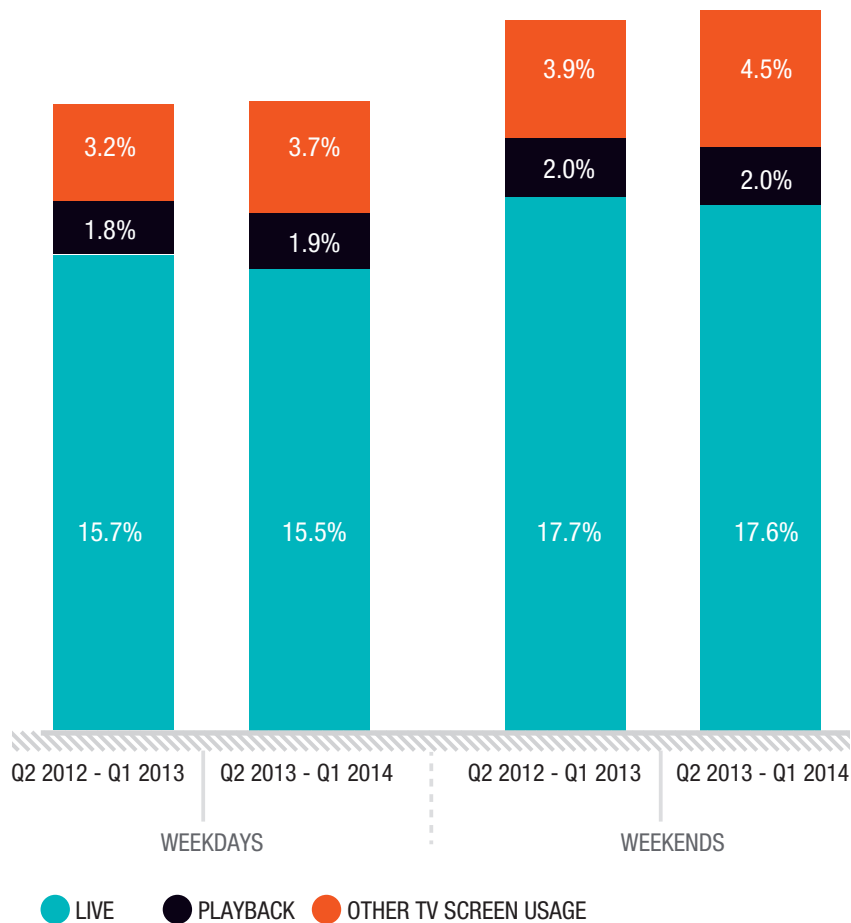
PEOPLE 50-64

Across the year to Q1 2014, 50-64s increased their Total Use of the TV set; time spent watching Live and Playback TV was steady year-on-year and their Other Screen Usage grew.

50-64s' Playback and Other Screen Usage peaks noticeably on weekday evenings, and also on weekend afternoons and prime time.

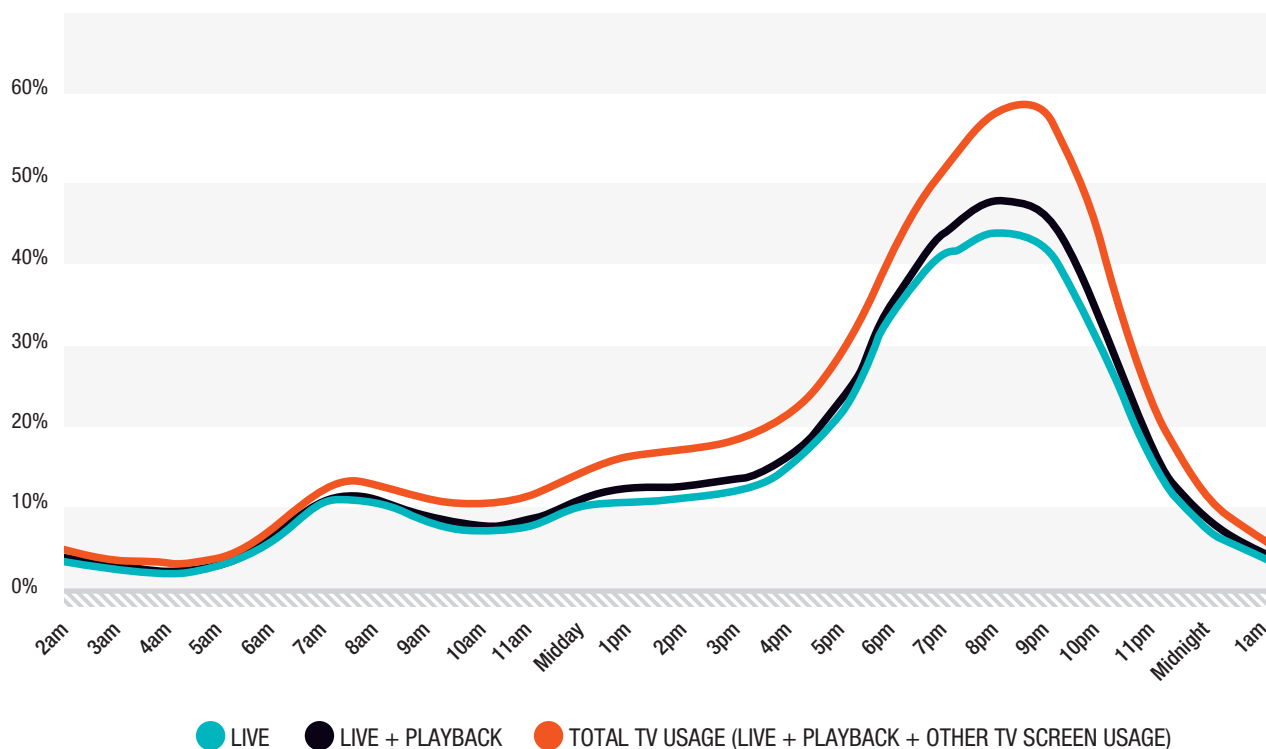
TOTAL TV SCREEN USAGE

TARP PEOPLE 50-64



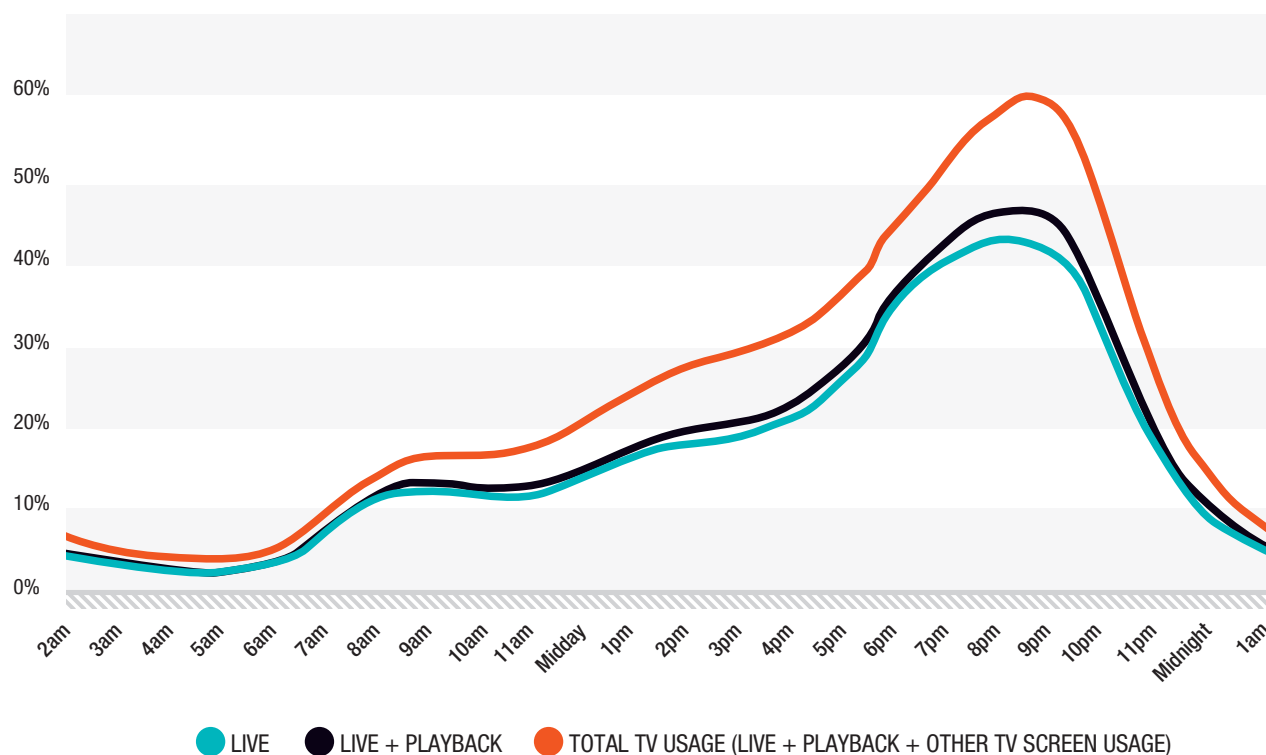
TOTAL TV SCREEN USAGE - SHAPE OF THE DAY

PEOPLE 50-64 TARP - WEEKDAYS [MONDAY TO FRIDAY]



TOTAL TV SCREEN USAGE - SHAPE OF THE DAY

PEOPLE 50-64 TARP - WEEKENDS [SATURDAY AND SUNDAY]



MONTH IN A LIFE

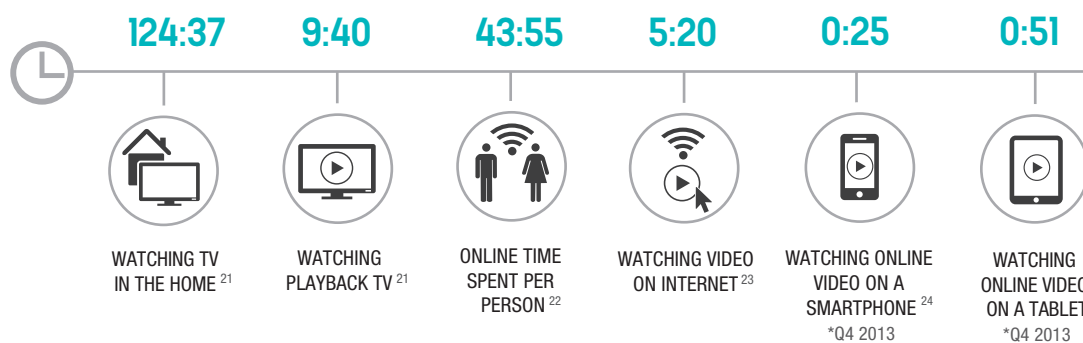
TV/ PLAYBACK/ ONLINE/ VIDEO ON INTERNET/ VIDEO ON SMARTPHONE/ VIDEO ON TABLET

50-64s

Although older people watch more traditional TV than their younger counterparts they are not left behind when it comes to new technologies.

The 5:20 per month people 50-64 spent viewing video on a PC/laptop in Q1 2014 shows Australians of all age groups are embracing new screens and the additional viewing opportunities they provide.

People 50-64 also report spending 51 minutes and 25 minutes per month viewing video on tablets and mobile phones, respectively (Q4 2013).



68 per cent of online Australians aged 50-64 say they ever multi-task, with 58 per cent claiming to do so at least once a month.

They use laptops most often to multi-task, followed by desktop computers, tablets and then mobile phones.

50-64s' most common online activities are email and search (tablets and computers), and checking weather and directions (mobile phones). Online video viewing is their tenth most common self-reported activity on tablets, and twelfth on computers and smartphones.

TOP 10 PC/ SMARTPHONE/ TABLET ACTIVITIES FOR 50-64s

DESKTOP/LAPTOP	SMARTPHONE	TABLET
<ol style="list-style-type: none"> 1 Email 2 Conducting a search (i.e. search engine) 3 Banking/bill payment 4 Accessing government services/ government-related information 5 News 6 Researching products/services/ businesses 7 Weather 8 Travel/transport information 9 Maps/directions 10 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) 	<ol style="list-style-type: none"> = 1 Weather = 1 Maps/directions = 3 Email = 3 Conducting a search (i.e. search engine) 5 News = 6 Travel/transport information = 6 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) 8 Sporting news/information/results 9 Researching products/services/ businesses 10 Banking/bill payment 	<ol style="list-style-type: none"> 1 Conducting a search (i.e. search engine) 2 Email = 3 News = 3 Weather 5 Maps/directions 6 Researching products/services/ businesses = 7 Sporting news/information/results = 7 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) 9 Travel/transport information = 10 Banking/bill payment = 10 Watching online video

PEOPLE 65+

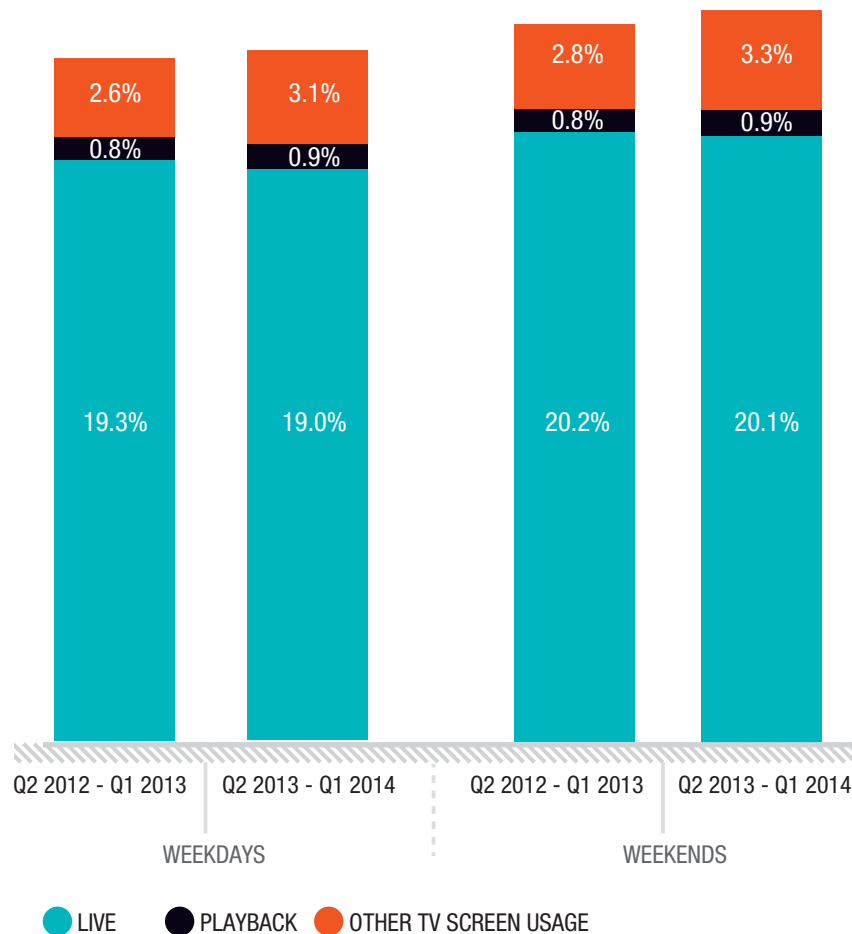
Consistent with the long-evident viewing lifecycle people over 65 are the heaviest TV viewers, spending 150:36 each month watching broadcast TV in Q1 2014, 11 minutes more per month than in the corresponding period a year earlier.

This age group increased their Playback viewing year-on-year more than others, watching an additional 1:47 per month (9:51 each month in the quarter).

Across the year to Q1 2014, people over 65's Total Use of the TV screen increased slightly, with a rise in Playback viewing offsetting a slight decline in Live viewing. Other Screen Usage among this age group increased year-on-year, demonstrating younger people are not the only ones using new technologies.

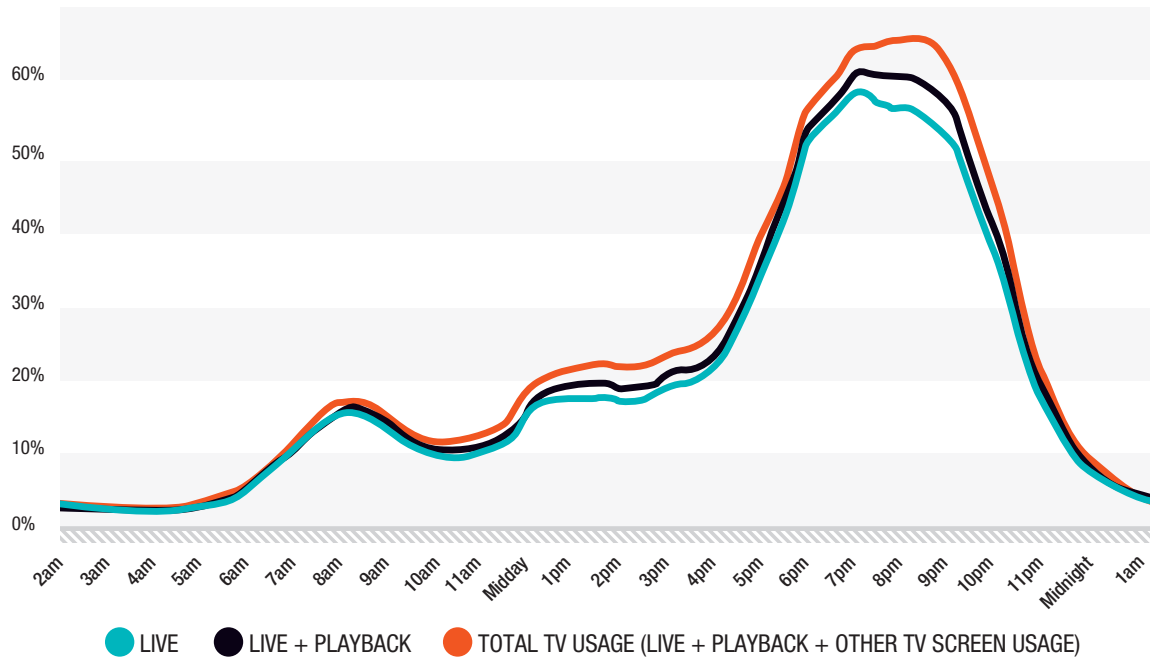
TOTAL TV SCREEN USAGE

TARP PEOPLE 65+



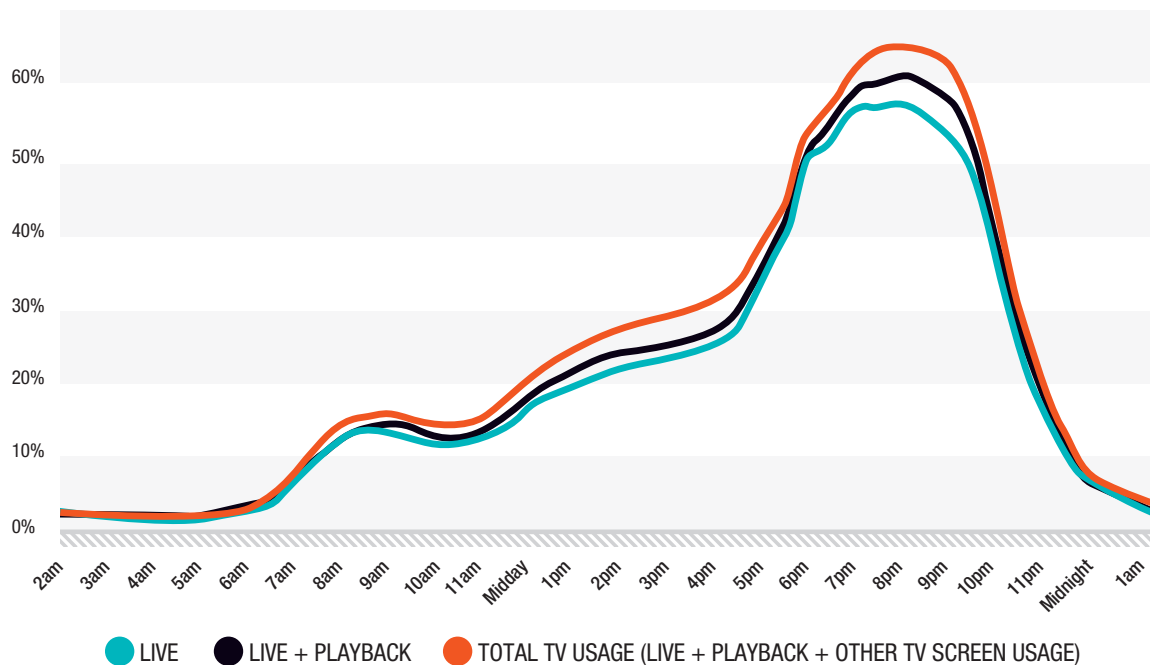
TOTAL TV SCREEN USAGE - SHAPE OF THE DAY

PEOPLE 65+ TARP - WEEKDAYS [MONDAY TO FRIDAY]



TOTAL TV SCREEN USAGE - SHAPE OF THE DAY

PEOPLE 65+ TARP - WEEKENDS [SATURDAY AND SUNDAY]



While over-65s are the least likely of all age groups to use their TV sets for purposes other than watching broadcast television, their Other Screen Usage is most pronounced

in the afternoons and evening peak. Compared to younger age groups their Total TV Screen Usage is relatively constant across the week and on weekends.

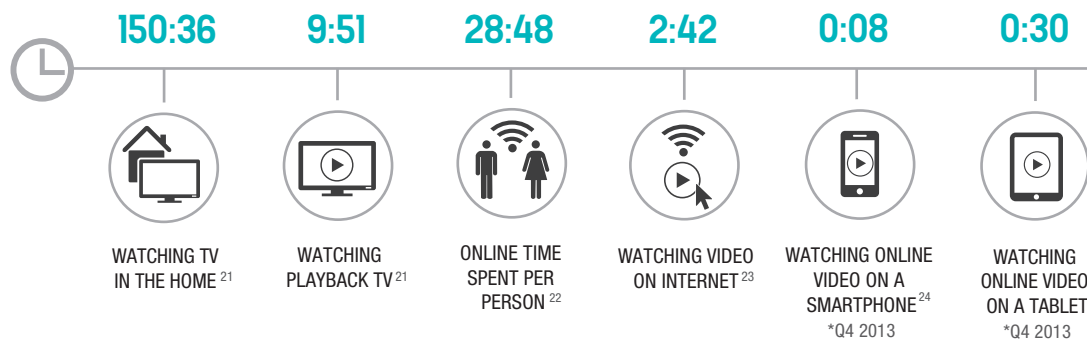


MONTH IN A LIFE

TV/ PLAYBACK/ ONLINE/ VIDEO ON INTERNET/
VIDEO ON SMARTPHONE/ VIDEO ON TABLET

65+

People 65+ are steadily embracing new screens for video viewing, particularly PCs/ laptops and tablets.



Over-65s are less likely than other age groups to multi-task: 48 per cent claim to ever do so, compared to 74 per cent of all Australians 16+. 52 per cent say they do not watch TV and access the internet at the same time.

When they do multi-task, people 65+ use laptops most often, just ahead of desktops and well ahead of tablets, with mobile phones their least commonly used device to multi-task.

Over-65s' principal online activities are email and search (laptops and tablets) and checking weather and directions/maps (smart phones).

Viewing online video is outside their top-ten most common online activities on connected devices: twelfth on computers, thirteenth on smartphones and eleventh on tablets.

TOP 10 PC/ SMARTPHONE/ TABLET ACTIVITIES FOR 65+

DESKTOP/LAPTOP	SMARTPHONE	TABLET
<ol style="list-style-type: none"> 1 Email 2 Conducting a search (i.e. search engine) 3 Accessing government services/ government-related information 4 Banking/bill payment 5 Researching products/services/ businesses = 6 Weather = 6 News 8 Travel/transport information 9 Sporting news/information/results 10 Maps/directions 	<ol style="list-style-type: none"> = 1 Weather = 1 Maps/directions 3 Email 4 Conducting a search (i.e. search engine) 5 News 6 Sporting news/information/results 7 Travel/transport information = 8 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) = 8 Researching products/services/ businesses = 8 Listening to streamed/downloaded music or radio 	<ol style="list-style-type: none"> 1 Email 2 Conducting a search (i.e. search engine) = 3 News = 3 Weather 5 Maps/directions 6 Researching products/services/ businesses = 7 Sporting news/information/results = 7 Travel/transport information 9 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter) 10 Accessing government services/ government-related information

AS VIEWING
PATTERNS EVOLVE,
IN MOST CASES
AUSTRALIANS USE
NEW TECHNOLOGIES
TO COMPLEMENT
OR ADD TO THEIR
TRADITIONAL TV
VIEWING.



KEY OBSERVATIONS

TABLE 1: TECHNOLOGY PENETRATION

	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
Completely DTT: Penetration within TV households (Homes capable of receiving DTT on each working TV within the home)	84%	88%	89%	91%	93%
Personal video recorder (PVR): Penetration within TV households	53%	54%	53%	53%	54%
2+PVR: Penetration within TV households	13%	14%	14%	14%	14%
Internet Connection: Household penetration ⁴	80%	80%	80%	80%	80%
Tablets: Household penetration	31%	33%	37%	40%	42%
Internet Capable TV in home	21%	22%	22%	23%	27%
Smartphones: People 16+ ⁵	61%	65%	67%	68%	69%

TABLE 2: MONTHLY TIME SPENT (HH:MM)

	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
Watching TV in the home ⁶	92:39	96:37	95:51	92:39	93:16
Watching Playback TV	6:48	7:46	7:10	6:47	7:15
Using Internet on a PC ⁷	51:47	-			
Online time spent per person ⁸	-	38:41	38:45	37:39	38:41
Watch video on PC/Laptop	-	-			
Watch video on Internet ⁹	6:43	6:26	5:18	5:52	7:48
Watching online video on a mobile phone ¹⁰	N.A.	N.A.	N.A.	1:56	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	1:47	N.A.

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 landline CATI ES prior to Q1 2014. Q1 2014 onwards, based on mobile and landline CATI ES. Estimate for internet capable TV in home refers to the capability to be internet connected, whether connected or not.

⁵ Sources: Nielsen Consumer & Media View national population aged 16+ (Q4 2013 onwards).

⁶ Source: Combined OzTAM Metro and Regional TAM databases with overlap homes de-duplicated. Average time spent viewing (ATV 0200-2600). 'Watching TV' and 'Watching Playback TV' are both based on Consolidated data. Playback viewing is up to 7 days after broadcast. Please note television viewing is seasonal, with people watching more television in the winter months and with the end of daylight saving time.

⁷ Source: Nielsen Online Ratings. 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.

⁸ Source: Nielsen Online Ratings – Hybrid Surfing from Q2 2013 onwards. Estimate is the average of the 3 months within the calendar quarter apart from Q2 2013 which is an estimate of May-June 2013 only. Figures are national and for People 2+. Figures include all online activities inclusive of PC applications such as iTunes, Skype etc.

⁹ Source: Nielsen Online Ratings – Hybrid Streaming (formerly VideoCensus) from Q3 2013 onwards. 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. Figures for Q4 2012 are the average of November and December 2012.

¹⁰ Mobile and tablet video source: Nielsen Australian Connected Consumer report for respondents aged 16 years and over (inclusive of total online population regardless of device ownership or video consumption). Monthly estimate based on reported weekly time spent multiplied by average number of weeks in a month (4.3). Figure relates to online video only.

TABLE 3: OVERALL USAGE [000s], MONTHLY REACH

	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
Watching TV in the home ¹¹	21,651	21,751	21,735	21,750	21,859
Watching Playback TV	9,595	10,092	9,712	9,745	10,946
Using Internet on a PC ¹²	14,908	-			
Online unique audience ¹³	-	16,979	16,744	16,193	16,235
Watch video on Internet ¹⁴	11,412	12,055	12,313	12,080	12,323
Owning/using a mobile phone ¹⁵	17,477	17,530	17,504	17,303	17,394
Watching online video on mobile phone ¹⁶	N.A.	N.A.	N.A.	2,824	N.A.
Watching online video on tablet ¹⁷	N.A.	N.A.	N.A.	2,209	N.A.

TABLE 4: A MONTH IN THE LIFE – Q1 2014

	KIDS ¹⁸	TEENS ¹⁹	P18-24	P25-34	P35-49	P50-64	P65+	ALL PEOPLE ²⁰
Watching TV in the home ²¹	65:06	45:12	45:14	74:21	98:06	124:37	150:36	93:16
Q1 2013	61:37	47:25	44:30	76:50	97:09	125:13	150:25	92:39
Watching Playback TV	4:02	4:13	4:42	6:56	8:13	9:40	9:51	7:15
Q1 2013	3:56	4:11	4:09	6:06	8:41	9:10	8:04	6:48
Online time spent per person ²²	5:36	9:55	40:37	42:16	42:48	43:55	28:48	38:41
Watch video on Internet ²³	7:05	6:40	16:28	10:05	7:17	5:20	2:42	7:48
Watching online video on a mobile phone ²⁴	N.A.	8:48	4:09	4:09	1:21	0:25	0:08	1:56
Q4 2013	N.A.							
Watching online video on tablet	N.A.	2:26	3:30	2:56	1:51	0:51	0:30	1:47
Q4 2013	N.A.							

¹¹ Source: Combined OzTAM Metro and Regional TAM databases with overlap homes de-duplicated. 'Watching TV' and 'Watching Playback TV' are both based on consolidated data (0200-2600). Playback viewing is up to 7 days after broadcast.

¹² Source: Nielsen Online Ratings. Using Internet connected 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 change in methodology, comparisons prior to Q42011 cannot be made.

¹³ Source: Nielsen Online Ratings – Hybrid Surfing from Q2 2013 onwards. Estimate is the average of the 3 months within the calendar quarter apart from Q2 2013 which is an estimate of May-June 2013 only. Figures are national and for People 2+. Figure includes all online activities inclusive of PC applications such as iTunes, Skype etc.

¹⁴ Source: Nielsen Online Ratings – Hybrid Streaming. Figures are national and for People 2+. Home and Work panel only. Due to a change in methodology comparisons prior to Q4 2012 cannot be made. Figures for Q4 2012 are the average of November and December 2012.

¹⁵ Mobile phone ownership and usage sourced from Nielsen Consumer & Media View (people aged 14+).

¹⁶ Source: Nielsen Australian Connected Consumers report from 2013-2014 (February 2014 edition) - national figures produced annually citing 18% of the online population aged 16+ for mobile video and 14% for tablet video. Audience figure calculated using national online active audience of 15,689,000 from Nielsen Online Ratings (January 2014).

¹⁷ Source: Nielsen Australian Connected Consumers report from 2013-2014 (February 2014 edition) - national figures produced annually citing 18% of the online population aged 16+ for mobile video and 14% for tablet video. Audience figure calculated using national online active audience of 15,689,000 from Nielsen Online Ratings (January 2014).

¹⁸ Combined Metro OzTAM and Regional TAM data defines 'Kids' aged 0-12 and Nielsen Netview aged 2-11.

¹⁹ Combined Metro OzTAM and Regional TAM data defines 'Teens' aged 13-17, Nielsen Netview aged 12-17 and Nielsen AOC aged 16-17.

²⁰ Mobile phone population based on people aged 16+.

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). Playback viewing is up to 7 days after broadcast.

²² Source: Nielsen Online Ratings – Hybrid Surfing from Q2 2013 onwards. Estimate is the average of the 3 months within the calendar quarter apart from Q2 2013 which is an estimate of May-June 2013 only. Figures are national and for people 2+. Figure includes all online activities inclusive of PC applications such as iTunes, Skype etc.

²³ Source: Nielsen VideoCensus. Figures for Q4 2012 are an average for November – December 2012. Nielsen Online Ratings – Hybrid Streaming (formerly VideoCensus) from Q3 2013 onwards. 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.

²⁴ Mobile and tablet video source: Nielsen Australian Connected Consumers report for respondents aged 16 years and over (inclusive of total online population regardless of device ownership or video consumption). Monthly estimate based on reported weekly time spent multiplied by average number of weeks in a month (4.3). Figure relates to online video only.

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

KIDS	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
Watching TV in the home ²¹	61:37	66:46	67:20	66:18	65:06
Watching Playback TV	3:56	4:20	4:11	3:42	4:02
Using the Internet on a PC ⁷	9:27				
Online time spent per person ²²		6:34	7:38	8:04	5:36
Watching video on Internet ²³	4:49	4:37	3:55	5:35	7:05
Watching online video on a mobile phone ²⁴	N.A.	N.A.	N.A.	N.A.	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	N.A.	N.A.

TEENS	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
Watching TV in the home ²¹	47:25	49:45	49:17	47:33	45:12
Watching Playback TV	4:11	4:57	4:26	4:30	4:13
Using the Internet on a PC ⁷	15:15	-	-	-	-
Online time spent per person ²²	-	14:47	14:41	13:01	9:55
Watching video on Internet ²³	6:56	7:18	6:33	6:27	6:40
Watching online video on a mobile phone ²⁴	N.A.	N.A.	N.A.	8:48	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	2:26	N.A.

P18-24	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
Watching TV in the home ²¹	44:30	47:18	46:37	43:24	45:14
Watching Playback TV	4:09	4:52	4:36	4:22	4:42
Using the Internet on a PC ⁷	45:41	-	-	-	-
Online time spent per person ²²	-	23:07	42:04	42:29	40:37
Watching video on Internet ²³	13:16	13:01	10:50	12:23	16:28
Watching online video on a mobile phone ²⁴	N.A.	N.A.	N.A.	4:09	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	3:30	N.A.

P25-34	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
Watching TV in the home ²¹	76:50	81:24	77:28	71:20	74:21
Watching Playback TV	6:06	7:31	6:41	6:03	6:56
Using the Internet on a PC ⁷	62:02	-	-	-	-
Online time spent per person ²²	-	43:53	43:57	43:12	42:16
Watching video on Internet ²³	8:20	8:39	7:26	7:55	10:05
Watching online video on a mobile phone ²⁴	N.A.	N.A.	N.A.	4:09	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	2:56	N.A.

P35-49	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
Watching TV in the home ²¹	97:09	103:07	104:26	98:56	98:06
Watching Playback TV	8:41	9:50	8:46	7:51	8:13
Using the Internet on a PC ⁷	59:47	-	-	-	-
Online time spent per person ²²	-	43:42	41:33	40:43	42:48
Watching video on Internet ²³	6:14	6:02	4:53	5:28	7:17
Watching online video on a mobile phone ²⁴	N.A.	N.A.	N.A.	1:21	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	1:51	N.A.

P50-64	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
Watching TV in the home ²¹	125:13	128:52	127:56	125:19	124:37
Watching Playback TV	9:10	10:20	9:34	9:13	9:40
Using the Internet on a PC ⁷	60:14	-	-	-	-
Online time spent per person ²²	-	40:53	41:17	40:27	43:55
Watching video on Internet ²³	4:06	3:39	3:09	3:23	5:20
Watching online video on a mobile phone ²⁴	N.A.	N.A.	N.A.	0:25	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	0:51	N.A.

P65+	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
Watching TV in the home ²¹	150:25	151:20	149:15	148:42	150:36
Watching Playback TV	8:04	8:54	8:41	9:04	9:51
Using the Internet on a PC ⁷	36:44	-	-	-	-
Online time spent per person ²²	-	25:17	26:36	26:59	28:48
Watching video on Internet ²³	1:52	2:06	1:58	2:29	2:42
Watching online video on a mobile phone ²⁴	N.A.	N.A.	N.A.	0:08	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	0:30	N.A.

ALL PEOPLE	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
Watching TV in the home ²¹	92:39	96:37	95:51	92:39	93:16
Watching Playback TV	6:48	7:46	7:10	6:47	7:15
Using the Internet on a PC ⁷	51:47	-	-	-	-
Online time spent per person ²²	-	38:41	38:45	37:39	38:41
Watching video on Internet ²³	6:43	6:26	5:18	5:52	7:48
Watching online video on a mobile phone ²⁴	N.A.	N.A.	N.A.	1:56	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	1:47	N.A.

TABLE 5: VIDEO AUDIENCE COMPOSITION (BY AGE AND GENDER) – Q1 2014

	KIDS	TEENS	P18-24	P25-34	P35-49	P50-64	P65+	FEMALES	MALES
On Traditional TV ²⁵	11%	3%	5%	12%	21%	24%	23%	53%	47%
Q1 2013	11%	3%	5%	12%	22%	25%	23%	53%	47%
On Internet ²⁶	2%	4%	11%	20%	29%	24%	12%	50%	50%

²⁵ 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).

²⁶ Source: Nielsen Online Ratings – Hybrid Streaming (formerly VideoCensus) from Q3 2013 onwards. 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. Figures for Q4 2012 are the average of November and December 2012.

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 playing back recorded TV content outside of the seven-day consolidation window.
- Please note 'Total TV Usage' does not equal the sum of 'Watching TV in the home' and 'Total Other Screen Usage' because the Playback base is different: 'Total TV Usage' = Live + Playback_When Watched (i.e. viewing of recorded broadcast content within 7 days of original broadcast at the time it is actually viewed) + 'Total Other Screen Usage'. 'Watching TV in the home' = Live + Playback_What Watched (viewing within 7 days of original broadcast attributed back to the time that program went to air: in other words, Consolidated viewing).
- Average time spent viewing (ATV) is calculated as the daily average time (0200-2600) within the universe across all days in the calendar quarter multiplied by the factor of numbers of days in the quarter divided by three (3).
- Monthly reach for TV is based on the

average of the calendar month cumulative reach audience (0200-2600) within the quarter.

- Video content is defined as a stream where both audio and video are detected. Video viewership excludes adult and advertising content, as well as downloaded content.
- Wherever possible, geographic and demographic data have been matched for like comparisons.
- Nielsen Australian Connected Consumer report 2014 (ACC) based on online national population aged 16+.
- Mobile phone ownership and usage sourced from Nielsen Consumer & Media View (people 14+).
- PVR Penetration within TV households in Table 1 is based on install levels from the Combined OzTAM Metro and Regional TAM panels as at the last date of each period.
- TAM data defines 'Kids' as panel members aged 0-12, 'Teens' aged 13-17 and 'Male' / 'Female' as total individuals aged 0+.
- Nielsen Netview defines 'Kids' as panel members aged 2-11, 'Teens' aged 12-17 and 'Male' / 'Female' as individuals aged 2+.
- Nielsen Australian Connected Consumer report defines 'Teens' as respondents aged 16-17 and 'Male' / 'Female' respondents aged 16+.
- Nielsen has implemented page crediting improvements in the measurement of web pages and time spent across all online activities, driving a trend break for May 2013 data onwards for time spent online. As part of these improvements, the previous metric of 'PC time spent' has been retired and replaced with the new metric of 'online time spent'. Online time spent is inclusive of all online activities including PC applications (e.g. iTunes, Skype, etc).
- March 2014 constituted a trend break for all key audience metrics from Nielsen Online Ratings - Hybrid. Nielsen, guided by its collaboration with IAB Australia's Measurement Council, transitioned to a new data processing platform and implemented a tightening of panel rules for online audience measurement. These new rules resulted in the removal of 'inactive' panelists and this has reset and stabilised the online universe metric which is so critical to how we ensure accurate measurement of Australian internet consumption.



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