

AUSTRALIAN MULTI-SCREEN REPORT

QUARTER 1
2015



AUSTRALIAN VIEWING TRENDS ACROSS MULTIPLE SCREENS

The Q1 2015 edition of the Australian Multi-Screen Report updates household take-up of new technologies and the trends in how major age groups view broadcast television and other video across multiple screens.

It also presents new findings from Nielsen's Australian Connected Consumers Report 2015 about Australians' claimed use of and attitudes towards various screen types: the devices they prefer to use for different activities, and the extent to which they use more than one device simultaneously ('multi-screening').

Australians have more choice in both the range of content available to them and the means by which they can access it than ever before. The resulting interplay between screen types influences the amount of time people spend using them.

KEY TRENDS EVIDENT

Television is still dominant.

- All age groups spend the majority of their viewing time watching broadcast television on in-home TV sets: across the population and screen types 88.4 per cent of all viewing takes place on the TV set.
- In Q1 2015 the average weekly reach for Australian broadcast television – including free-to-air and subscription channels – was little changed on the same quarter in 2014 and 2013, at 88–89 per cent of the population.

- 22.158 million Australians watched at least some broadcast television each month during Q1 2015.

The way people use their television sets is changing.

- The proportion of time spent viewing live-to-air television has dropped gradually in each of the past five years, while playback viewing through the TV set continues to rise. Even so, 91.6 per cent of all broadcast TV viewed on television sets is still watched at the time of original broadcast (live-to-air).
- An increasing percentage of the time people spend with the TV now goes to activities other than watching broadcast television. This follows the take-up of 'smart' TVs – now in nearly one third of homes – along with growth in viewing of TV content between 8 and 28 days from original (live) broadcast. In Q1 2015 such viewing accounted for 1.66 per cent of all TV viewing time across the day.

Australians' use of connected mobile devices to watch video is growing but remains relatively small.

- Across the population as a whole watching video is not the primary activity Australians undertake on their mobile screens. Viewing habits are evolving however, with people under 35 in particular increasingly using internet-connected devices to watch video.

SCREEN TECHNOLOGIES IN AUSTRALIAN HOMES

Internet-capable TVs ('smart' or hybrid TVs) are now in 30 per cent of homes (27 per cent a year ago) – whether actually connected to the internet or not.

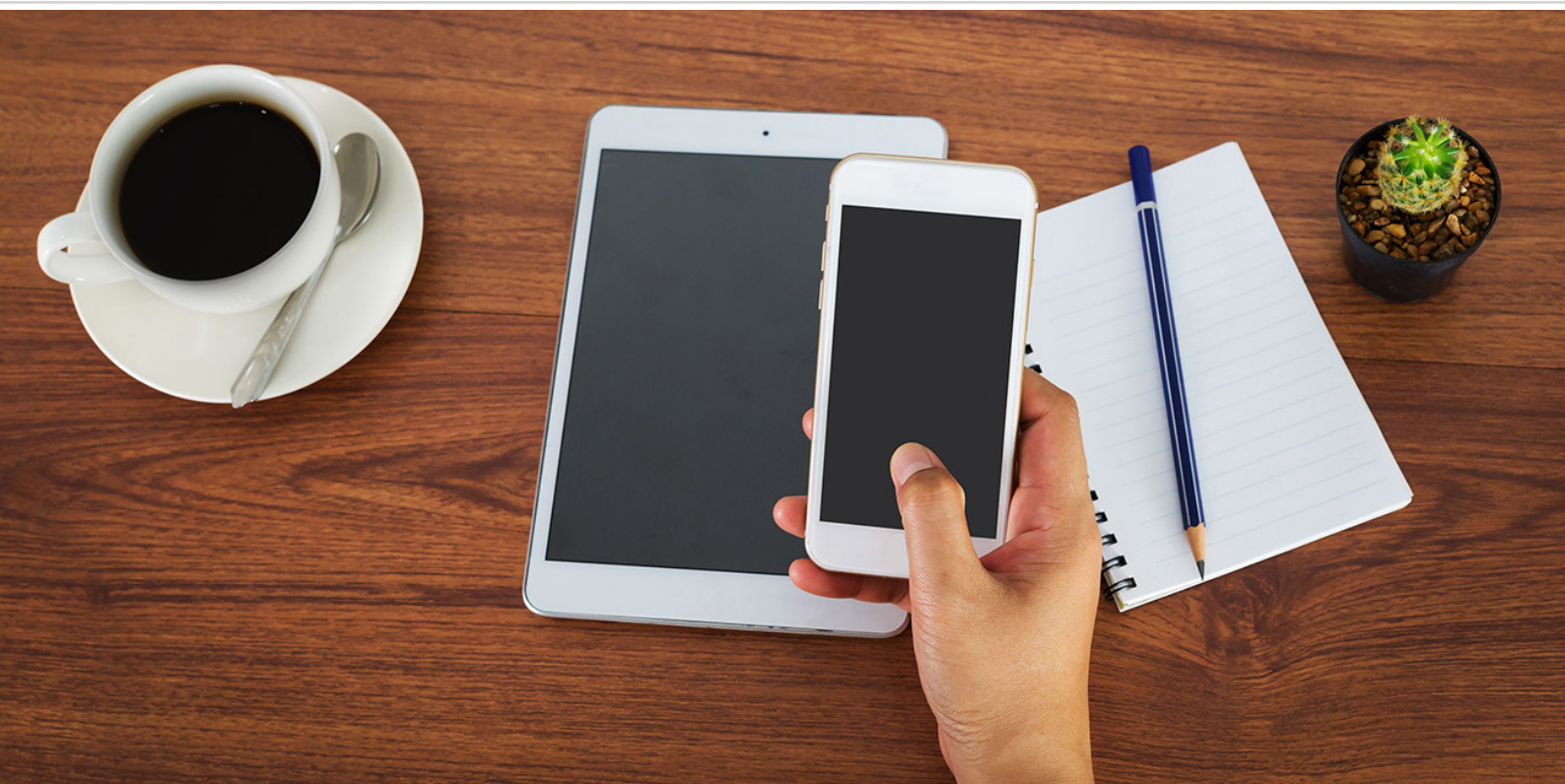
All Australian television homes can access **digital terrestrial broadcast** (DTT) channels on at least one household TV set and 96 per cent of TV homes can access DTT channels on every working household set.

PVR penetration is levelling off at 56 per cent of homes (54 per cent in Q1 2014), with 15 per cent owning two or more PVRs (14 per cent a year ago).

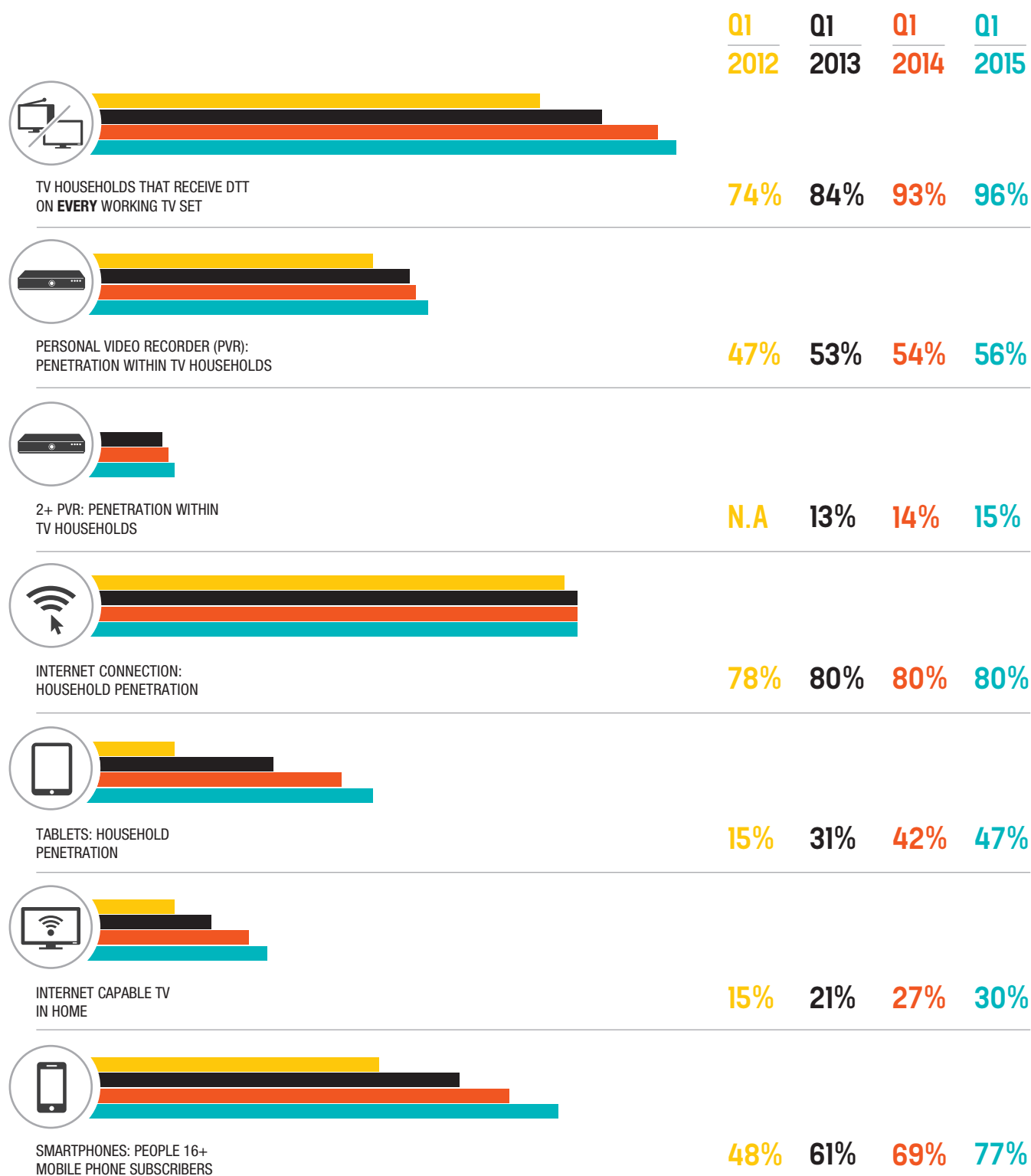
Tablets are now in an estimated 47 per cent of homes. The rate of tablet take-up continues to slow – unchanged on the final quarter of 2014, and up from 42 per cent of homes in Q1 2014.

77 per cent of Australians aged 16 and over own a **smartphone** (69 per cent in Q1 2014).

80 per cent of homes have an **internet connection**, a level unchanged in the past nine quarters.



TECHNOLOGY PENETRATION



TIME SPENT VIEWING ON TELEVISIONS AND OTHER DEVICES

As households adopt new screens and technologies people have more choice as to what, when, where and how they watch TV and other video.

This in turn affects the time they spend with these devices.

In Q1 2015 Australians watched an average of 89 hours and 28 minutes (89:28) of **broadcast television** – free-to-air and subscription channels – on TV sets per month. This compares to 93:16 per month in Q1 2014 (down 3:48 per month year-on-year).*

81:57 (or, 91.6 per cent) of that 89:28 was viewed live, that is, at the time the broadcast went to air.

Broadcast content viewed in **playback** mode through the TV set within seven days of original broadcast rose 16 minutes per month year-on-year, to 7:31.

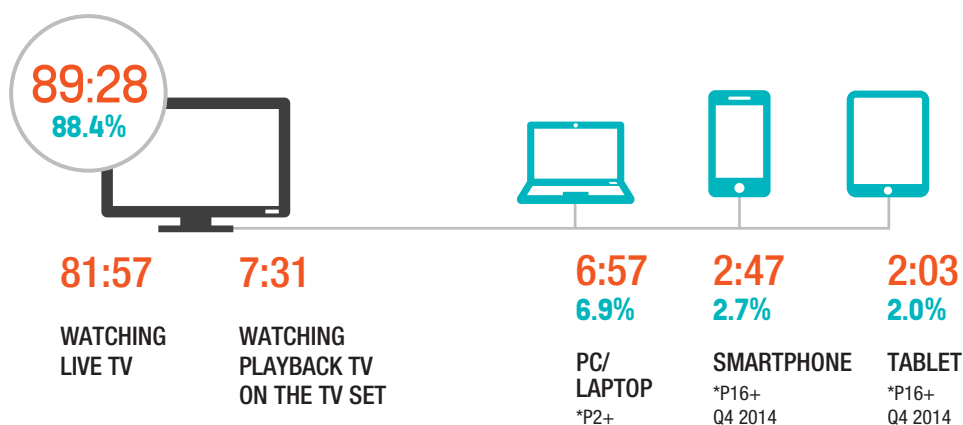
Seasonality affects television viewing, as Australians watch more in winter and less in summer and with the start of daylight saving time. Across the population the average weekly reach of broadcast television has been 88–89 per cent in the first quarter of each of the last three years.

The use of new devices to watch TV and other video content is increasing though it remains a small proportion of overall viewing time: 11.6 per cent of all video viewing – both broadcast and non-broadcast content – happens on screens other than the TV.

* When the Q4 2014 Multi-Screen Report was first published it stated TV viewing was down by 86 seconds per day year-on-year in Q4 2014. That calculation was incorrect and has been removed.



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



Australians aged 2+ spent 6 hours and 57 minutes (6:57) per month in the quarter watching online video on a **PC or laptop**, down 51 minutes on the 7:48 they spent doing so a year ago. Such material includes streamed video, e.g. internet-delivered catch-up TV, as well as other content such as YouTube.

Each month Australians spent an average of 35:51 online in the quarter on work and home computers (38:41 a year earlier).

Across the Australian online population aged 16 and above people claim to spend 2:47 per month watching any online video on a **smartphone** (Q4 2014; up from 1:56 in Q4 2013.)

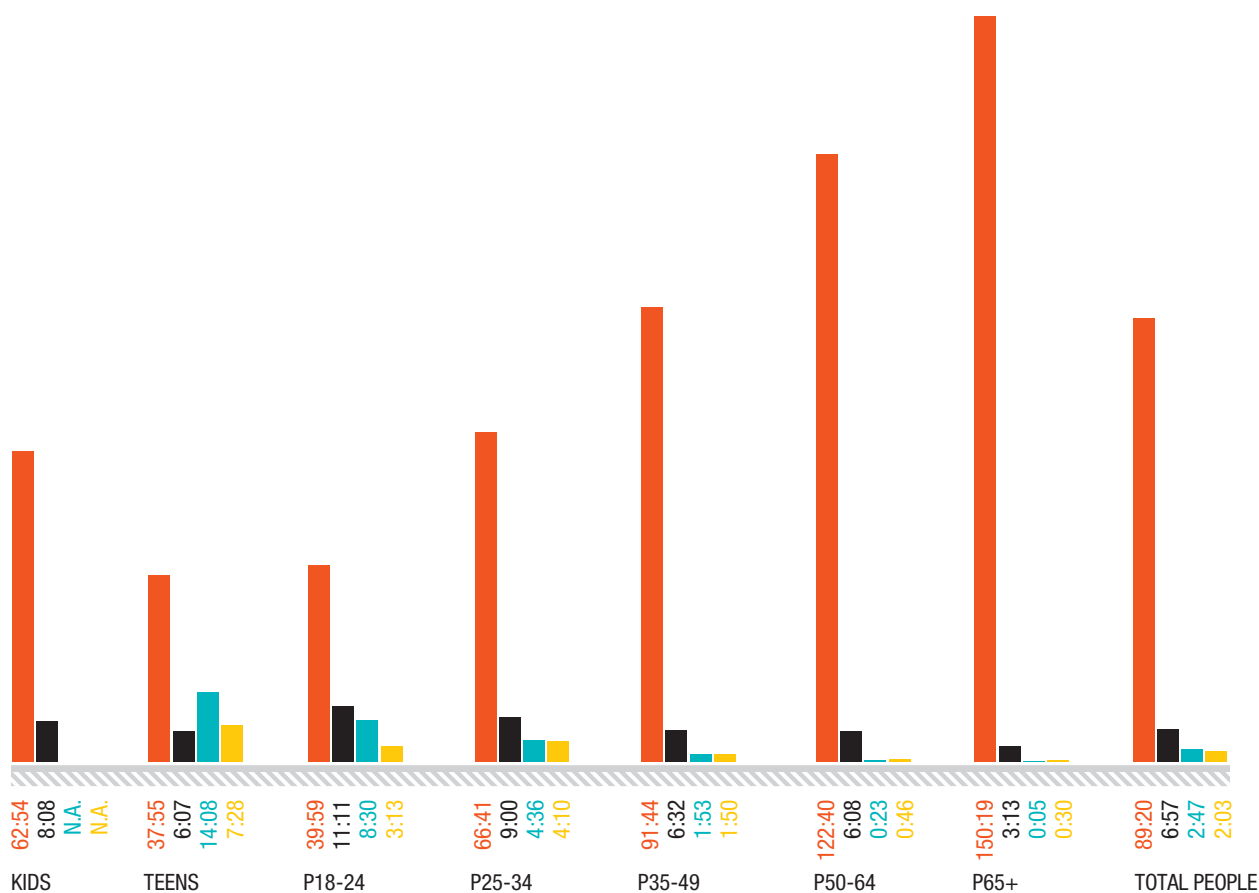
Online Australians aged 16+ report spending 2:03 watching any online video on a **tablet** each month (Q4 2014; compared to 1:47 in Q4 2013).

The preferences and top activities various age groups undertake on their connected devices are explored further in 'Evolving Viewing Patterns by Age Group' later in this report.



MONTH IN A LIFE

TV / PC / LAPTOP / SMARTPHONE / TABLET



WATCHING TV
IN THE HOME



WATCHING ANY
ONLINE VIDEO ON
PC/LAPTOP (P2+)



WATCHING ANY
ONLINE VIDEO ON A
SMARTPHONE (P16+)
Q4 2014

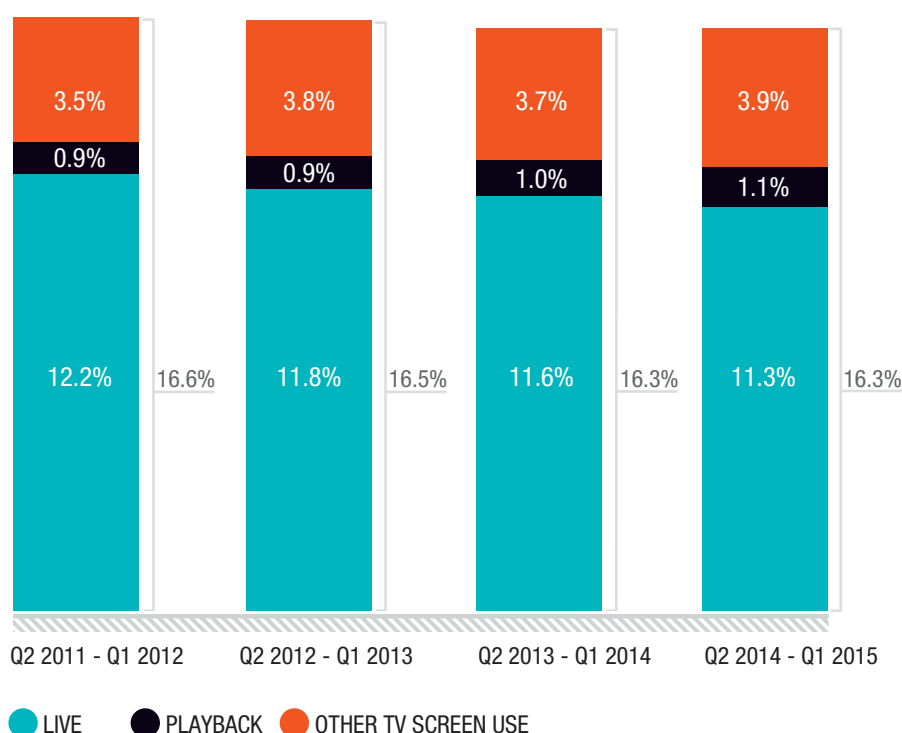


WATCHING ANY
ONLINE VIDEO
ON A TABLET (P16+)
Q4 2014

TOTAL USE OF THE TELEVISION SET

The TV set can now also be used for activities in addition to watching broadcast television – whether on its own or in conjunction with devices or services attached to it – such as games consoles, PVRs and over-the-top (OTT) internet-delivered services. This is causing the way in which Australians use their TV sets to evolve.

////// 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 Q2 2014 – Q1 2015 (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.

From Q2 2014 to Q1 2015 Australians' total use of the TV set – including live and playback TV viewing, and other screen use – averaged out at 16.3 per cent TARP across the whole day, level with the year before.

As a percentage of total broadcast viewing, live viewing declined by 0.3 per cent TARP (live is when people watch free-to-air or subscription channels at the time the broadcast actually went to air). Playback rose (when people play back broadcast material at normal speed through their television set within seven days of original broadcast) – consistent with the gradual, steady increase over the past four years.

Other screen use – when people use their TV screens for purposes other than watching live or playing back broadcast television within

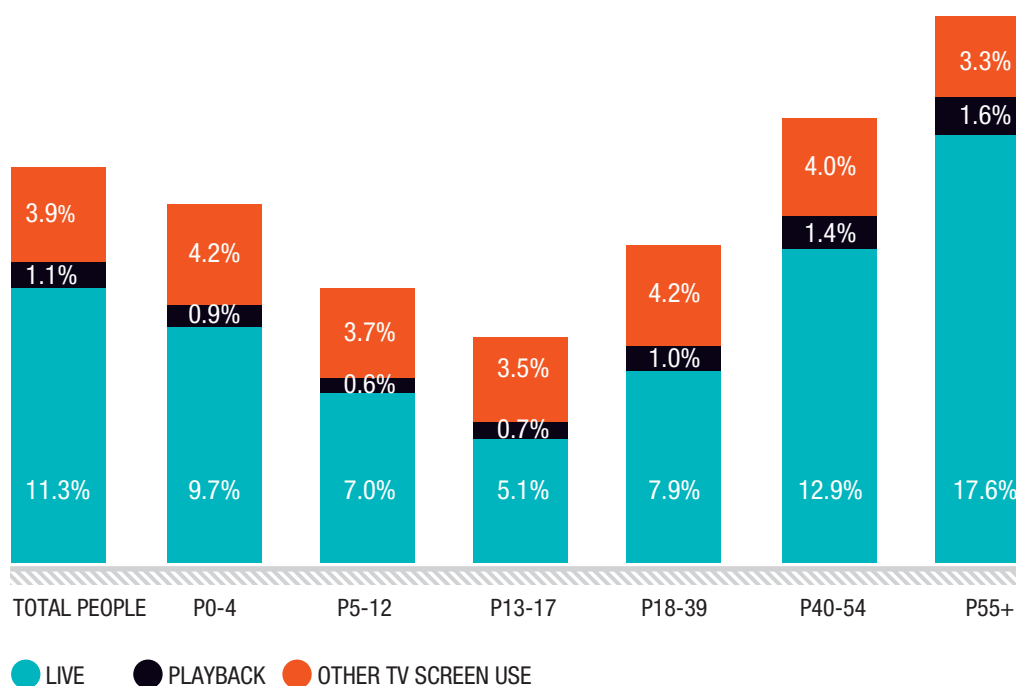
seven days – has risen incrementally, by 0.4 per cent TARP over the past four years. Examples of such activity include gaming; viewing OTT services; accessing TV network streaming services; internet browsing; watching DVDs; or playing back TV content beyond seven days from original broadcast.

Among all major age groups, teens aged 13-17 devote the greatest proportion of their time with the TV set to other screen use though still spend more than half of their TV screen time watching live TV.



TARP BY DEMOGRAPHIC

Q2 2014 - Q1 2015



A CLOSER LOOK AT OTHER SCREEN USE

Across the population other screen use rose by an average 1 hour and 48 minutes (1:48) year-on-year in Q1 2015.

screen activities – fell by an average 1:59 per month year-on-year, mainly due to a drop in live TV viewing.

The total time people spent using their TV screens – both for watching live and playback television, as well as on other



MONTHLY TIME SPENT [HH:MM]

TOTAL PEOPLE

	Q1 2013	Q1 2014	Q1 2015
Watching TV in the home	92:39	93:16	89:28
Watching Live TV	85:51	86:01	81:57
Watching Playback * TV	6:48	7:15	7:31
Total TV Screen Use	120:33	122:15	120:16
Watching Live TV	85:51	86:01	81:57
Watching Playback ^ TV	6:59	7:25	7:42
Other Screen Use	27:43	28:49	30:37

* Playback **What** Watched TV

^ Playback **When** Watched TV

Explaining What Watched and When Watched

'Total TV Screen Use' – as detailed in the monthly time spent table above – does not equal the sum of 'Watching TV in the home' and 'Total other screen use' because the playback base is different.

'Total TV screen use' = live + **playback when watched** (i.e., playback within seven days at the time it is actually viewed) + 'Total other screen use'. Watching TV in the home = live + **playback of what is watched** [i.e., viewing of broadcast content within seven days is attributed back to the time at which the program actually went to air ('Consolidated' viewing).] For example: Program X airs on Sundays at 20.30. A viewer watches this program at midday on Tuesday. In when watched, the playback activity would be at midday on Tuesday. In what watched, the playback viewing would be attributed back to 20.30 on Sunday.

PLAYBACK VIEWING BEYOND SEVEN DAYS

As shown earlier in this section, other screen use accounted for 3.9 per cent TARP in the rolling four quarters to Q1 2015. This saw people spend 30 hours and 37 minutes (30:37) per month in Q1 2015 using the TV set for activities other than watching live or playing back broadcast TV within seven days. One such activity is viewing of broadcast TV between 8 and 28 days after the original broadcast (such viewing does not appear in the playback figures within OzTAM and Regional TAM Consolidated data).

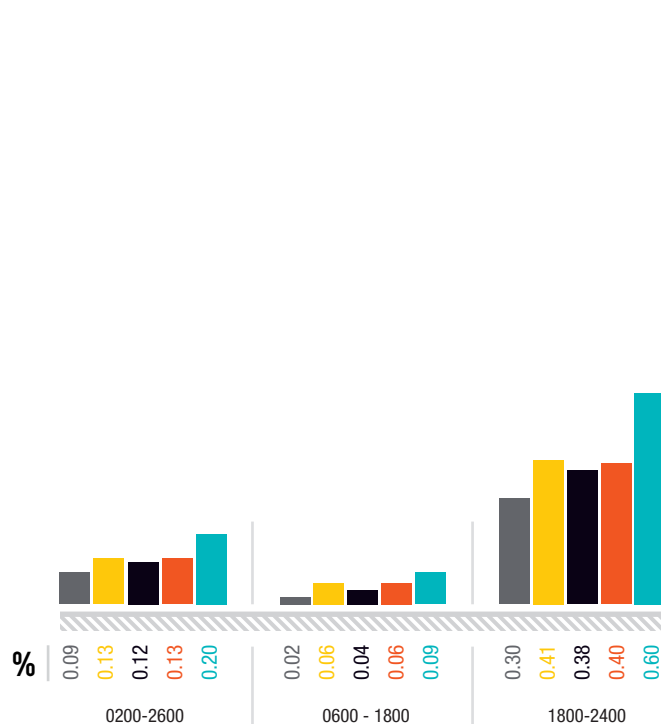
Over the past four years Australians have been spending more time engaging in this 8-28 day playback activity.

For example, in the four-week period 22 February - 21 March 2015 (P3) 8-28 day playback viewing rose by 0.07 TARP on the same period a year earlier to now account for 1.66 per cent of all TV viewing time across the day (1.06 per cent in Q1 2014).

As with live and playback (within seven days) viewing, such activity is heaviest in prime time.

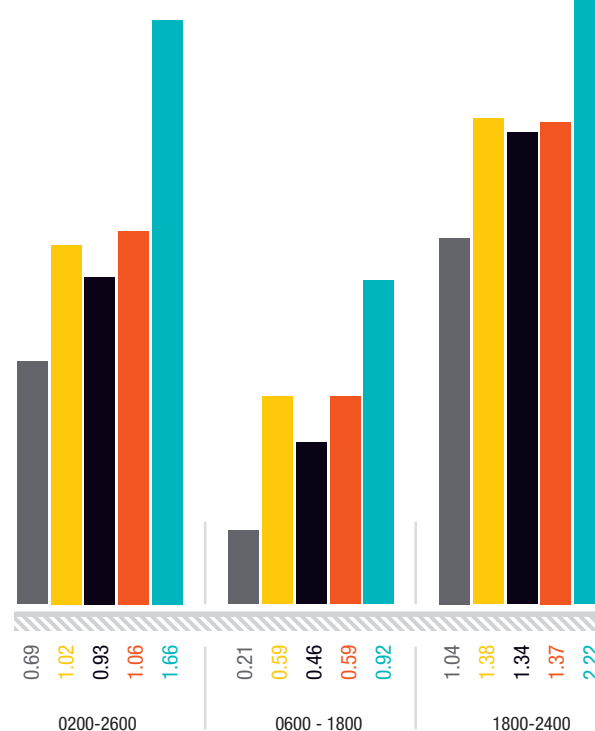
DAY 8-28 PLAYBACK VIEWING

TARP - TOTAL PEOPLE



% SHARE OF VIEWING ESTIMATES

TOTAL PEOPLE



● P3 2011 ● P3 2012 ● P3 2013 ● P3 2014 ● P3 2015

SIMULTANEOUS SCREEN USE

As more Australians have access to internet-capable devices than ever before they have greater opportunities to 'multi-screen' – that is, to use another screen while they are watching television.

Among online Australians, multi-screening is a relatively mature activity: Nielsen's annual Australian Connected Consumers report shows 75 per cent of online Australians aged 16+ say they ever watch TV and use the internet simultaneously – little changed over the past few years.

The frequency at which they multi-screen has also remained fairly stable: more than one third of multi-screenerers say they do so daily and the majority (85 per cent) report doing so at least once a week. Triple-screening on the

other hand (watching TV and using two other devices at the same time) is growing: 31 per cent of online Australians aged 16+ say they have ever triple-screened – up from 26 per cent the previous year.

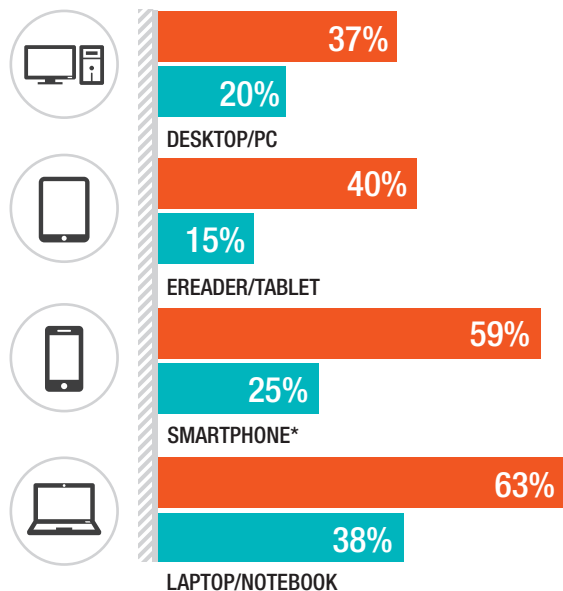
Slightly more women say they multi-screen than men (76 per cent of women compared to 73 per cent of men) and multi-screening is highest among consumers under 35 years of age, where nine in ten say they have done so.

Across the population people who multi-screen say they most often use their laptop/notebook computers for this activity, followed by smartphones*, desktop computers and then tablets. Laptops are still dominant but mobile devices are now the second most used, overtaking the desktop PC.

75%
of online Australians
16+ ever simultaneously
consume TV + internet

● USE REGULARLY
● USE MOST OFTEN

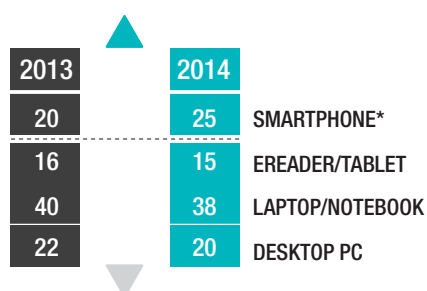
Source: Nielsen Australian Connected Consumers Report 2015



*Please note the survey question specified 'mobile' phone and therefore the results discussed in this section of the report could include some people using an internet-capable non-smartphone.

USE MOST OFTEN

Whereas laptops and desktops were dominant in the previous two years smartphones are now used most often to multi-screen.



Source: Nielsen Australian Connected Consumers Report 2015

As in previous years, the activities people most often undertake on various devices differ. The desktop or laptop computer is still where much online access occurs: top activities include email, search, banking and accessing news.

Smartphone use reflects the fact they are often used outside the home: examples include activities that facilitate travel – such as accessing maps and directions and checking weather – as well as other short, quick and frequent tasks. People also use their smartphones to check social media more often than on other devices.

Tablet activities are closer to those on desktops/laptops, as they are more widely used in the home and accordingly more like a traditional computer. However search plays a more important role on tablets, along with updating or browsing social media and watching online video.

TOP ACTIVITY BY DEVICE

TOTAL PEOPLE

DESKTOP/LAPTOP	SMARTPHONE	TABLET
<ol style="list-style-type: none"> 1 Email 2 Search 3 Banking/bill payment 4 News 5 Researching or comparing products/services/businesses = 6 Weather = 6 Maps/directions 8 Updating your social media profile or browsing others' 9 Travel/transport information 10 Watching online video 	<ol style="list-style-type: none"> 1 Maps/directions 2 Weather 3 Email 4 Search 5 Updating your social media profile or browsing others' 6 News 7 Travel/transport information 8 Banking/bill payment 9 Sporting news/information/results 10 Listening to streamed/downloaded music or radio = 11 Researching or comparing products/services/businesses = 11 Watching online video 	<ol style="list-style-type: none"> 1 Search 2 Email 3 News = 4 Weather = 4 Maps/directions = 6 Updating your social media profile or browsing others' = 6 Researching or comparing products/services/businesses = 6 Watching online video 9 Travel/transport information 10 Sporting news/information/results

Source: Nielsen Australian Connected Consumers Report 2015

EVOLVING VIEWING PATTERNS BY AGE GROUP

This edition of the Australian Multi-Screen Report continues its customary look at the changing viewing patterns of people within the main age groups to provide a more comprehensive picture of their multi-screen activities.

The trends evident in the past few years persist. For example: while people aged 50 and over watch the most TV on TV sets, the time they spend watching any video on connected devices continues to rise.

And Australians under age 25 spend more than 50 per cent of their total viewing time watching broadcast television on TV sets, even though they are the heaviest viewers of video on connected devices.

Tablet/smartphone viewing data is only for P16+; PC viewing for P2+



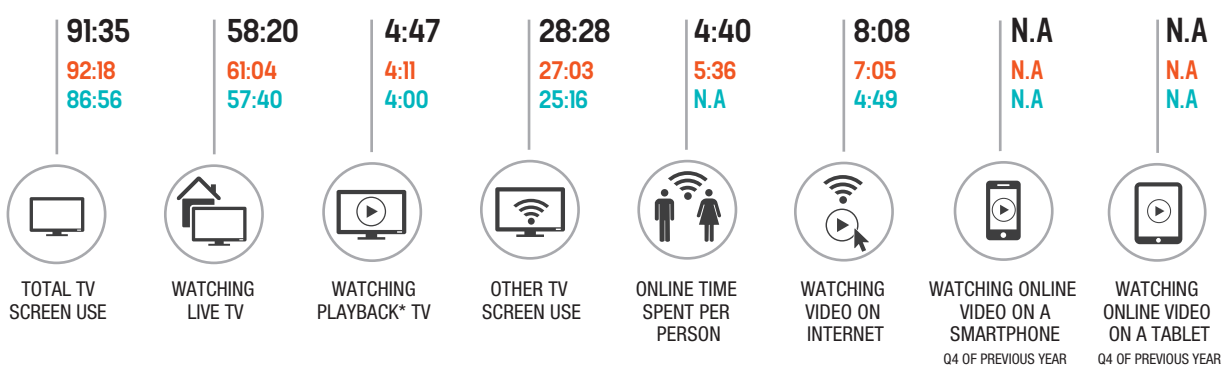
KIDS

MONTH IN A LIFE

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

Kids watch more broadcast television than teens and 18-24s, and watch more video on the internet than their 16-17 year-old counterparts, adding an additional 1:03 per month doing so year-on-year.

● Q1 2013 ● Q1 2014 ● Q1 2015



*When watched

Please see note about 'when' vs 'what' watched in playback on page 10.

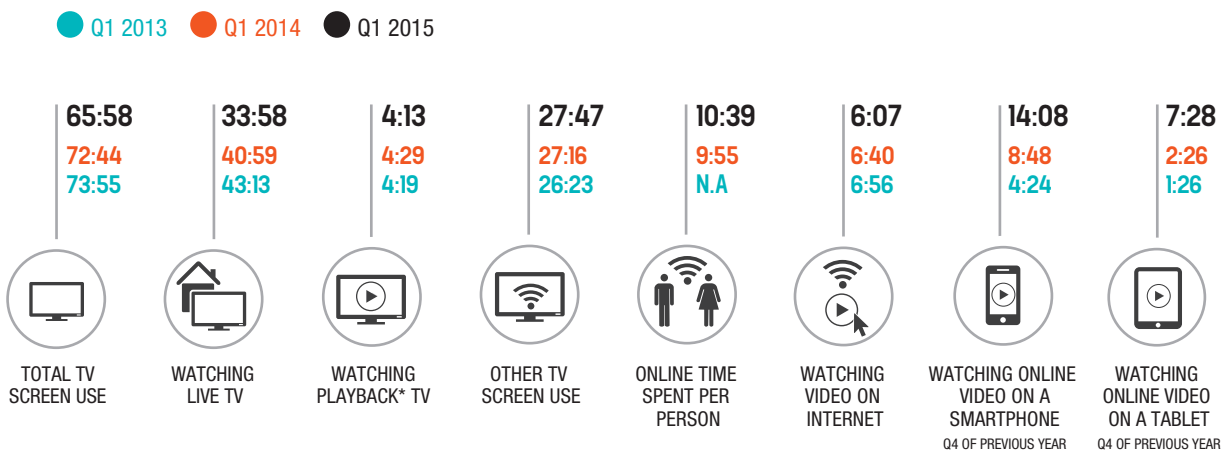


TEENS

MONTH IN A LIFE

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

Teens report spending the most amount of time in aggregate watching video on connected devices each month: the time they claim to spend doing so on smartphones rose 60 per cent year-on-year, and nearly trebled on tablets, though fell by 33 minutes on PC/laptops.



*When watched

Nielsen's Australian Connected Consumers report shows teens aged 16-17, along with 18-34s, have greatest tendency among all online Australians to multi-screen. 92 per cent of online 16-17 year-olds report ever doing so (up from 89 per cent the previous year), with 83 per cent claiming to do so at least monthly.

By comparison, 89 per cent of online 18-24 year-olds, 90 per cent of 25-34 year-olds, and 75 per cent across the online population as a whole say they have ever multi-screened.

16-17s say they most often use their smartphones when multi-screening, followed by laptop computers and desktops.



TOP ACTIVITY BY DEVICE

TEENS

DESKTOP/LAPTOP	SMARTPHONE	TABLET
<ol style="list-style-type: none"> 1 Email 2 Search 3 Watching online video 4 Listening to streamed/downloaded music or radio 5 Updating your social media profile or browsing others' = 6 Researching or comparing products/services/businesses = 6 News 8 Social TV (i.e., interacting with others/posting/reading comments about TV programs (incl sport) or movies as you are watching them/watched recently 9 Travel/transport information 10 Banking/bill payment 	<ol style="list-style-type: none"> = 1 Search = 1 Updating your social media profile or browsing others' 3 Maps/directions 4 Email 5 Listening to streamed/downloaded music or radio 6 Weather 7 Watching online video 8 Travel/transport information 9 Social TV (i.e., interacting with others/posting/reading comments about TV programs (incl sport) or movies as you are watching them/watched recently 10 News 	<ol style="list-style-type: none"> 1 Watching online video 2 Search 3 Researching or comparing products/services/businesses 4 Listening to streamed/downloaded music or radio = 5 Connecting with/interacting with organisations or companies via social media sites = 5 Weather = 5 Maps/directions = 8 News = 8 Email 10 Updating your social media profile or browsing others'

Source: Nielsen Australian Connected Consumers Report 2015



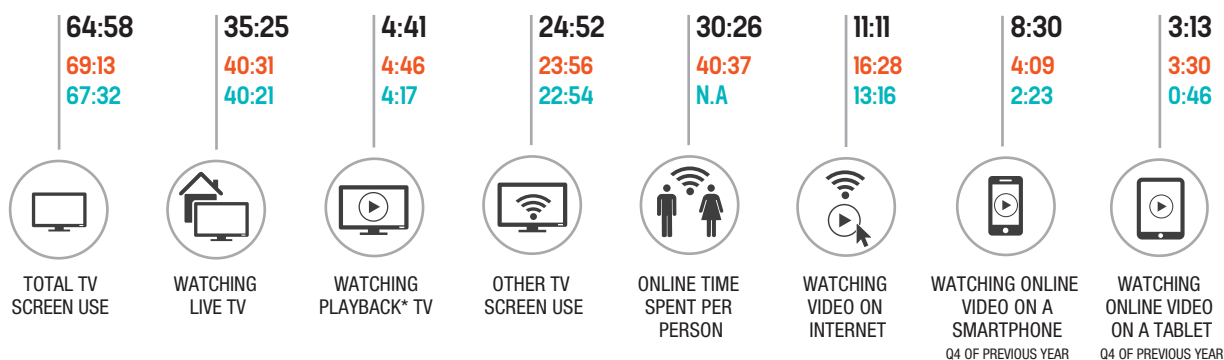
18-24s

MONTH IN A LIFE

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

The amount of time 18-24s spent watching video on smartphones doubled year-on-year but fell by 17 minutes a month on tablets (Q4 2014). While the time they spent doing so on a PC or laptop also declined year-on-year 18-24s still watch more video on a PC or laptop than other age groups.

● Q1 2013 ● Q1 2014 ● Q1 2015



89 per cent of online 18-24s report ever multi-screening (just behind younger teens at 92 per cent), with 84 per cent doing so monthly. Similar to teens, smartphones are key multi-screening devices among 18-24 year-olds however to a lesser extent than their younger counterparts. While smartphones remain the top multi-screening device used by 18-24s, laptops and desktops have become more popular.

Email and getting directions/maps are the most common online activities 18-24s claim to use their smartphones for; search is their most common activity on both tablets and computers.

Watching online video is now 18-24s' third most common activity on computers, second on tablets and eighth on smartphones.



TOP ACTIVITY BY DEVICE

18-24s

DESKTOP/LAPTOP	SMARTPHONE	TABLET
<ol style="list-style-type: none"> 1 Search 2 Email 3 Watching online video = 4 Updating your social media profile or browsing others' = 4 Researching or comparing products/services/businesses 6 Listening to streamed/downloaded music or radio = 7 Banking/bill payment = 7 News 9 Travel/transport information 10 Maps/directions 	<ol style="list-style-type: none"> 1 Email 2 Maps/directions 3 Updating your social media profile or browsing others' 4 Weather 5 Search 6 News 7 Travel/transport information 8 Watching online video = 9 Listening to streamed/downloaded music or radio = 9 Banking/bill payment 	<ol style="list-style-type: none"> 1 Search 2 Watching online video = 3 Email = 3 Updating your social media profile or browsing others' 5 News = 6 Researching or comparing products/services/businesses = 6 Listening to streamed/downloaded music or radio = 8 Weather = 8 Maps/directions 10 Social TV (i.e., interacting with others/posting/reading comments about TV programs (incl sport) or movies as you are watching them/watched recently)

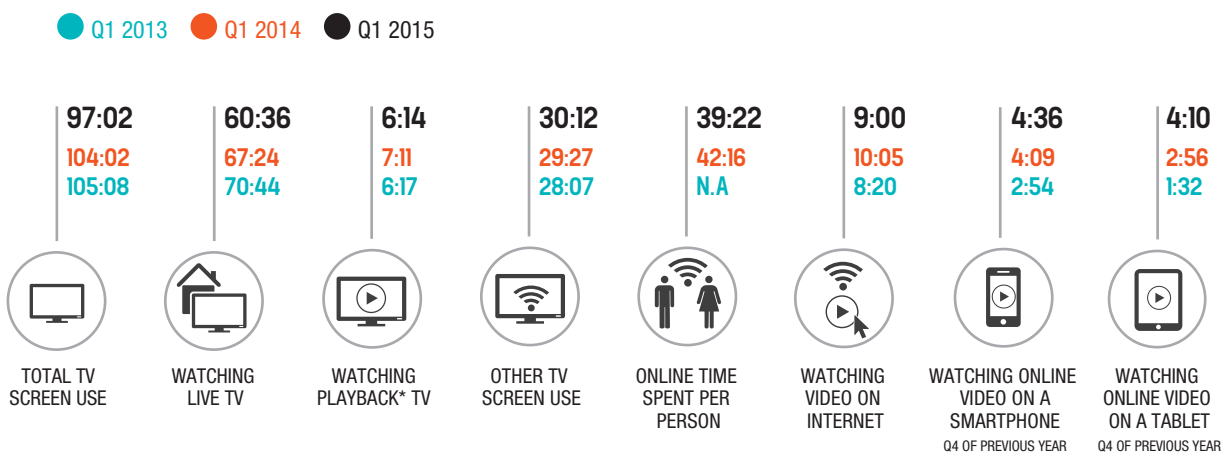
Source: Nielsen Australian Connected Consumers Report 2015

25-34s

MONTH IN A LIFE

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

25-34s spent an average of 66:36 per month watching TV in the home (live and 'what watched' playback within seven days) in Q1 2015. Year-on-year they self-reported 27 additional minutes each month watching any video on a smartphone and one hour and 14 minutes more on a tablet while the amount of time they spent watching video on a desktop or laptop declined by an hour.



*When watched

Online Australians aged 25-34 closely follow teens as the age group most likely to multi-screen: 90 per cent of 25-34s report ever doing so, slightly higher than 18-24s (89 per cent) and compared to 75 per cent across the population as a whole. 84 per cent of 25-34 year olds say they multi-screen on a monthly basis or more often.

25-34s use their smartphones most frequently for multi-screening however laptops are used almost as often. Desktops follow as the next most popular device however tablets are becoming more popular with this age group.

The top online activities for 25-34s are search and email (on computers); search, email and online video (tablets); and maps/directions, email and checking weather (smartphones). While they say watching online video is their second most common activity on tablets, video viewing is their seventh most popular activity on desktop/laptops, and tenth on their smartphones.



TOP ACTIVITY BY DEVICE

25-34s

DESKTOP/LAPTOP	SMARTPHONE	TABLET
<ol style="list-style-type: none"> 1 Search 2 Email 3 Banking/bill payment 4 News 5 Researching or comparing products/services/businesses 6 Updating your social media profile or browsing others' 7 Watching online video 8 Travel/transport information 9 Maps/directions 10 Weather 	<ol style="list-style-type: none"> = 1 Maps/directions = 1 Email 3 Weather 4 Updating your social media profile or browsing others' 5 Search 6 News 7 Banking/bill payment 8 Travel/transport information 9 Researching or comparing products/services/businesses =10 Social TV (i.e., interacting with others/posting/reading comments about TV programs (incl sport) or movies as you are watching them/watched recently =10 Watching online video 	<ol style="list-style-type: none"> 1 Search = 2 Email = 2 Watching online video 4 Updating your social media profile or browsing others' 5 News = 6 Maps/directions = 6 Researching or comparing products/services/businesses 8 Weather 9 Travel/transport information 10 Banking/bill payment

Source: Nielsen Australian Connected Consumers Report 2015



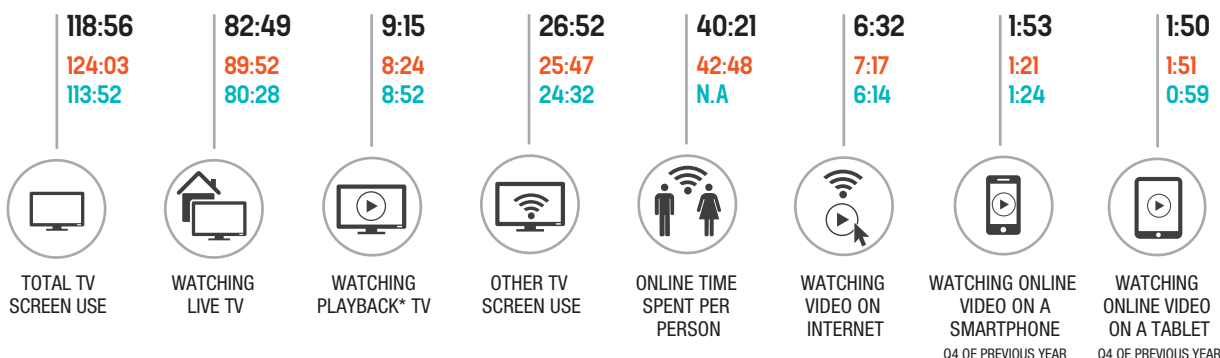
35-49s

MONTH IN A LIFE

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

35-49s watch nearly 92 hours of broadcast television each month compared to just over 10 hours, in aggregate, watching any video on a PC/laptop, smartphone or tablet. They spent 45 fewer minutes each month watching video on a PC or laptop year-on-year, but reported an additional 32 minutes each month doing so on smartphones.

● Q1 2013 ● Q1 2014 ● Q1 2015



82 per cent of online 35-49 year-olds say they ever multi-screen, with 74 per cent claiming to do so at least once a month (fairly stable compared to the previous year).

Contrary to younger age groups where smartphones are the key multi-screening device, 35-49s use their laptops most often. Smartphones come second, however desktops and tablets are almost on par as the third most-used devices.

The top online activities among 35-49s are email and search (tablets and computers), and directions and checking weather (smartphones). Watching online video is their seventh most common self-reported activity on tablets. Video falls to tenth on desktop/laptops and eleventh on smartphones.



TOP ACTIVITY BY DEVICE

35-49s

DESKTOP/LAPTOP	SMARTPHONE	TABLET
<ol style="list-style-type: none"> 1 Email 2 Search 3 Banking/bill payment 4 News 5 Researching or comparing products/services/businesses = 6 Weather = 6 Updating your social media profile or browsing others' 8 Maps/directions 9 Travel/transport information 10 Watching online video 	<ol style="list-style-type: none"> = 1 Maps/directions = 1 Weather 3 Email 4 Search 5 Updating your social media profile or browsing others' 6 News 7 Travel/transport information 8 Banking/bill payment 9 Sporting news/information/results 10 Researching or comparing products/services/businesses 11 Watching online video 	<ol style="list-style-type: none"> 1 Search 2 Email 3 News 4 Weather 5 Maps/directions 6 Researching or comparing products/services/businesses = 7 Updating your social media profile or browsing others' = 7 Watching online video = 9 Travel/transport information = 9 Banking/bill payment

Source: Nielsen Australian Connected Consumers Report 2015

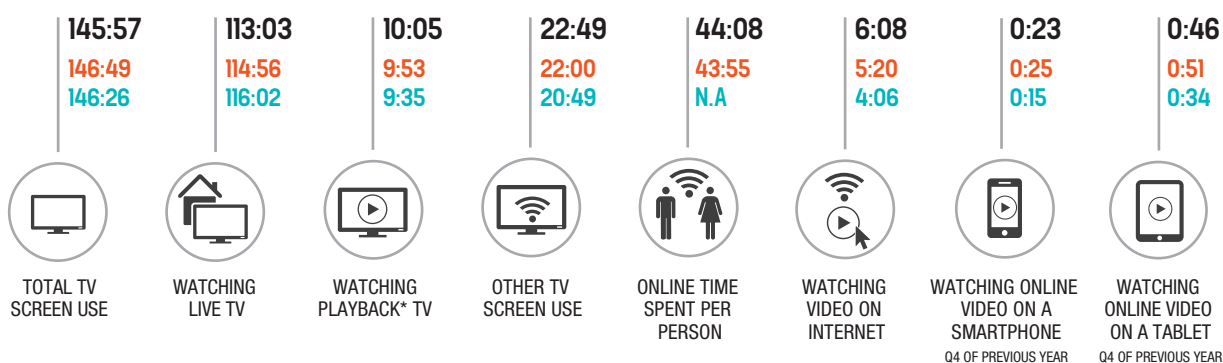
50-64s

MONTH IN A LIFE

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

Older consumers have always watched more television than younger audiences, but Australians aged 50-64 increased the time they spent watching any video on connected devices by an aggregate 41 minutes year-on-year, with all the growth going to desktops/laptops. The time they spent viewing on tablets and smartphones fell by a few minutes compared to Q4 2014.

● Q1 2013 ● Q1 2014 ● Q1 2015



*When watched

65 per cent of online Australians aged 50-64 say they ever multi-screen (a slight decline compared to the previous year at 68 per cent). 57 per cent claim to do so at least once a month (stable year-on-year).

Devices used for multi-screening shift in popularity with older populations. Laptops are the key multi-screening device among this age group, with many citing them as the device they use most often, followed by the desktop, tablet and then the smartphone – in contrast with younger consumers for whom smartphones are key.

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



TOP ACTIVITY BY DEVICE

50-64s

DESKTOP/LAPTOP	SMARTPHONE	TABLET
<ol style="list-style-type: none"> 1 Email 2 Search 3 Banking/bill payment 4 News 5 Weather 6 Maps/directions 7 Researching or comparing products/services/businesses 8 Travel/transport information 9 Updating your social media profile or browsing others' 10 Sporting news/information/results 11 Watching online video 	<ol style="list-style-type: none"> = 1 Maps/directions = 1 Weather 3 Email 4 Search 5 News 6 Travel/transport information 7 Updating your social media profile or browsing others' 8 Sporting news/information/results 9 Banking/bill payment 10 Listening to streamed/downloaded music or radio 11 Researching or comparing products/services/businesses 12 Watching online video 	<ol style="list-style-type: none"> 1 Search 2 Email = 3 News = 3 Weather 5 Maps/directions 6 Travel/transport information Researching or comparing products/services/businesses = 7 Updating your social media profile or browsing others' = 7 Sporting news/information/results = 9 Banking/bill payment = 9 Watching online video

Source: Nielsen Australian Connected Consumers Report 2015



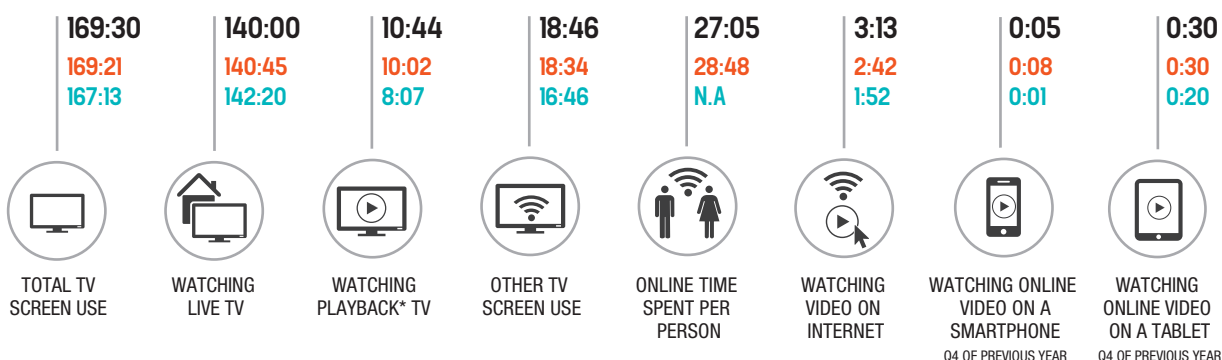
65+

MONTH IN A LIFE

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

In Q1 2015 the viewing behaviour of people aged 65 and over changed little year-on-year aside from the time they spent viewing any video on PCs or laptops, which grew by 31 minutes per month.

● Q1 2013 ● Q1 2014 ● Q1 2015



*When watched

Over-65s are less likely than other age groups to multi-screen: 49 per cent claim to ever do so, compared to 75 per cent of all online Australians 16+. When they do multi-screen they use traditional computing devices such as the laptop and desktop most often, followed by the tablet, then smartphone.

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

Viewing online video is their eleventh most common self-reported activity on both tablets and computers, and twelfth on smartphones.



TOP ACTIVITY BY DEVICE

65+

DESKTOP/LAPTOP	SMARTPHONE	TABLET
1 Email	= 1 Weather	1 Email
2 Search	= 1 Maps/directions	2 Weather
3 Banking/bill payment	= 3 Email	3 Search
4 Weather	= 4 Search	= 4 Maps/directions
5 News	= 4 News	= 4 News
6 Maps/directions	= 6 Travel/transport information	6 Travel/transport information
7 Travel/transport information	= 6 Sporting news/information/results	7 Updating your social media profile or browsing others'
8 Researching or comparing products/services/businesses	8 Updating your social media profile or browsing others'	= 8 Sporting news/information/results
9 Updating your social media profile or browsing others'	9 Banking/bill payment	= 8 Researching or comparing products/services/businesses
10 Sporting news/information/results	= 10 Researching or comparing products/services/businesses	10 Banking/bill payment
= 11 Listening to streamed/downloaded music or radio	= 10 Listening to streamed/downloaded music or radio	11 Watching online video
= 11 Watching online video	12 Watching online video	

Source: Nielsen Australian Connected Consumers Report 2015



NEW SCREENS AND
TECHNOLOGIES GIVE
AUSTRALIANS MORE
VIEWING CHOICE AND
INFLUENCE THE TIME
THEY SPEND WITH
VARIOUS DEVICES.

KEY OBSERVATIONS

TABLE 1: TECHNOLOGY PENETRATION

	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015
Completely DTT: Penetration within TV households (Homes capable of receiving DTT on each working TV within the home)	93%	94%	95%	95%	96%
Personal video recorder (PVR): Penetration within TV households	54%	55%	55%	56%	56%
2+PVR: Penetration within TV households	14%	14%	15%	15%	15%
Internet Connection: Household penetration ¹	80%	80%	80%	80%	80%
Tablets: Household penetration	42%	42%	45%	47%	47%
Internet Capable TV in home (Whether connected or not)	27%	27%	29%	30%	30%
Smartphones: People 16+ ²	69%	71%	74%	73%	77%

TABLE 2: MONTHLY TIME SPENT (HH:MM)

	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015
Watching TV in the home ³	93:16	97:03	96:58	90:27	89:28
Watching Playback TV	7:15	7:58	8:08	7:21	7:31
Online time spent per person ⁴	38:41	39:27	37:44	37:08	35:51
Watch video on Internet ⁵	7:48	8:08	7:30	7:28	6:57
Watching online video on a smartphone ⁶ (Q4 2014)	N.A.	N.A.	N.A.	2:47	N.A.
Watching online video on a tablet ⁶ (Q4 2014)	N.A.	N.A.	N.A.	2:03	N.A.

¹ Source: Estimates for internet connection, tablet household penetration and Internet capable TV in home from combined OzTAM Metro and Regional TAM quarterly Establishment Surveys (ES). Based on mobile and landline CATI ES. Estimate for internet capable TV in home refers to the capability to be internet connected, whether connected or not.

² Source: Nielsen Consumer & Media View national population aged 16+. Note that a methodology change from Q2 2014 onwards and a change in how smartphone ownership was asked from Q1 2015 onwards caused trend breaks in the data. Data from Q2-Q4 2014 is based on the online population to account for a transition to the new methodology and new line of questioning for smartphone ownership.

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. Includes free-to-air and subscription television viewing. Please note television viewing is seasonal, with people watching more television in the winter months and with the end of daylight saving time.

⁴ Source: Nielsen Online Ratings – Hybrid Surfing. Estimate is the average of the 3 months within the calendar quarter. Figures include all online activities inclusive of PC applications such as iTunes, Skype etc.

⁵ 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.

⁶ Smartphone 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. Figure relates to online video only.

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

	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015
Watching TV in the home ⁷	21,859	21,920	21,789	21,813	22,158
Watching Playback TV	10,946	11,210	11,352	11,469	11,769
Online unique audience ⁸	16,235	17,394	17,585	17,704	18,001
Watch video on Internet ⁹	12,323	13,516	13,377	13,288	13,343
Owning/using a smartphone ¹⁰	13,171	13,171	12,062	12,132	14,629
Watching online video on smartphone ¹¹ (Q4 2014)	N.A.	N.A.	N.A.	3,470	N.A.
Watching online video on tablet ¹¹ (Q4 2014)	N.A.	N.A.	N.A.	2,479	N.A.

TABLE 4: A MONTH IN THE LIFE – Q1 2015

	KIDS ¹²	TEENS ¹³	P18-24	P25-34	P35-49	P50-64	P65+	TOTAL PEOPLE
Watching TV in the home ⁷	62:58	37:55	40:03	66:36	91:53	122:55	150:33	89:28
Q1 2014	65:06	45:12	45:14	74:21	98:06	124:37	150:36	93:16
Watching Playback TV	4:38	3:57	4:37	5:59	9:04	9:52	10:33	7:31
Q1 2014	4:02	4:13	4:42	6:56	8:13	9:40	9:51	7:15
Online time spent per person ⁸	4:40	10:39	30:26	39:22	40:21	44:08	27:05	35:51
Watch video on Internet ⁹	8:08	6:07	11:11	9:00	6:32	6:08	3:13	6:57
Watching online video on a smartphone ¹⁴ Q4 2014	N.A.	14:08	8:30	4:36	1:53	0:23	0:05	2:47
Watching online video on tablet ¹⁴ Q4 2014	N.A.	7:28	3:13	4:10	1:50	0:46	0:30	2:03

⁷ 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.

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

⁹ 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.

¹⁰ Source: Nielsen Consumer & Media View national population aged 16+. Note that a methodology change from Q2 2014 onwards and a change in how smartphone ownership was asked from Q1 2015 onwards caused trend breaks in the data. Data from Q2-Q4 2014 is based on the online population to account for a transition to the new methodology and new line of questioning for smartphone ownership.

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

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

¹³ Combined Metro OzTAM and Regional TAM data defines 'Teens' aged 13-17, Nielsen Netview aged 12-17 and Nielsen Nielsen Australian Connected Consumers Report aged 16-17.

¹⁴ Smartphone 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. Figure relates to online video only.

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

KIDS¹²	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015
Watching TV in the home ⁷	65:06	69:49	69:11	63:58	62:58
Watching Playback TV	4:02	4:27	4:48	4:34	4:38
Online time spent per person ⁸	5:36	7:27	4:56	4:52	4:40
Watching video on Internet ⁹	7:05	7:20	4:44	5:47	8:08
TEENS¹³	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015
Watching TV in the home ⁷	45:12	46:44	47:20	43:07	37:55
Watching Playback TV	4:13	4:40	4:40	4:34	3:57
Online time spent per person ⁸	9:55	11:27	9:58	12:51	10:39
Watching video on Internet ⁹	6:40	6:33	5:28	7:02	6:07
Watching online video on a smartphone ¹⁴ Q4 2014	N.A.	N.A.	N.A.	14:08	N.A.
Watching online video on a tablet ¹⁴ Q4 2014	N.A.	N.A.	N.A.	7:28	N.A.
P18-24	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015
Watching TV in the home ⁷	45:14	45:50	44:23	40:02	40:03
Watching Playback TV	4:42	4:55	4:44	4:12	4:37
Online time spent per person ⁸	40:37	40:00	36:23	34:14	30:26
Watching video on Internet ⁹	16:28	13:02	9:09	10:56	11:11
Watching online video on a smartphone ¹⁴ Q4 2014	N.A.	N.A.	N.A.	8:30	N.A.
Watching online video on a tablet ¹⁴ Q4 2014	N.A.	N.A.	N.A.	3:13	N.A.
P25-34	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015
Watching TV in the home ⁷	74:21	77:56	75:45	68:21	66:36
Watching Playback TV	6:56	7:17	7:14	6:08	5:59
Online time spent per person ⁸	42:16	44:18	41:09	41:07	39:22
Watching video on Internet ⁹	10:05	9:49	7:17	9:41	9:00
Watching online video on a smartphone ¹⁴ Q4 2014	N.A.	N.A.	N.A.	4:36	N.A.
Watching online video on a tablet ¹⁴ Q4 2014	N.A.	N.A.	N.A.	4:10	N.A.

P35-49		Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015
Watching TV in the home ⁷		98:06	103:05	102:32	93:53	91:53
Watching Playback TV		8:13	9:06	9:24	8:43	9:04
Online time spent per person ⁸		42:48	42:50	42:22	39:28	40:21
Watching video on Internet ⁹		7:17	8:15	7:17	6:39	6:32
Watching online video on a smartphone ¹⁴	Q4 2014	N.A.	N.A.	N.A.	1:53	N.A.
Watching online video on a tablet ¹⁴	Q4 2014	N.A.	N.A.	N.A.	1:50	N.A.

P50-64		Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015
Watching TV in the home ⁷		124:37	130:21	131:42	124:59	122:55
Watching Playback TV		9:40	10:59	11:05	9:41	9:52
Online time spent per person ⁸		43:55	43:57	45:21	45:47	44:08
Watching video on Internet ⁹		5:20	7:00	7:05	7:21	6:08
Watching online video on a smartphone ¹⁴	Q4 2014	N.A.	N.A.	N.A.	0:23	N.A.
Watching online video on a tablet ¹⁴	Q4 2014	N.A.	N.A.	N.A.	0:46	N.A.

P65+		Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015
Watching TV in the home ⁷		150:36	152:20	154:29	148:03	150:33
Watching Playback TV		9:51	10:42	11:10	10:10	10:33
Online time spent per person ⁸		28:48	28:26	45:21	30:22	27:05
Watching video on Internet ⁹		2:42	3:13	3:39	3:54	3:13
Watching online video on a smartphone ¹⁴	Q4 2014	N.A.	N.A.	N.A.	0:05	N.A.
Watching online video on a tablet ¹⁴	Q4 2014	N.A.	N.A.	N.A.	0:30	N.A.

TOTAL PEOPLE		Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015
Watching TV in the home ⁷		93:16	97:03	96:58	90:27	89:28
Watching Playback TV		7:15	7:58	8:08	7:21	7:31
Online time spent per person ⁸		38:41	39:27	37:44	37:08	35:51
Watching video on Internet ⁹		7:48	8:08	7:30	7:28	6:57
Watching online video on a smartphone ¹⁴	Q4 2014	N.A.	N.A.	N.A.	2:47	N.A.
Watching online video on a tablet ¹⁴	Q4 2014	N.A.	N.A.	N.A.	2:03	N.A.

TABLE 5: VIDEO AUDIENCE COMPOSITION (BY AGE AND GENDER) – Q1 2015

	KIDS	TEENS	P18-24	P25-34	P35-49	P50-64	P65+	FEMALES	MALES
On Traditional TV ⁷	12%	3%	4%	11%	21%	25%	25%	53%	47%
Q1 2014	12%	3%	5%	12%	21%	24%	23%	53%	47%
On Internet ⁹	4%	4%	10%	19%	28%	23%	11%	51%	49%
Q1 2014	3%	4%	10%	19%	29%	23%	12%	49%	51%

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 played back through the TV set within seven days of the original broadcast time.
- Other Screen Use is TV screen use that excludes live and playback viewing of broadcast television within seven days of the original broadcast time. It can include non-broadcast activities such as gaming, online activity on the TV screen and playing back TV content outside of the seven-day consolidation window.
- Please note 'Total TV screen use' does not equal the sum of 'Watching TV in the home' and 'Total other screen use' because the playback base is different. 'Total TV screen use' = live + **playback when watched** (i.e., playback within seven days at the time it is actually viewed) + 'Total other screen use'. Watching TV in the home = live + **playback of what is watched** (viewing of broadcast content within seven days is attributed back to the time at which the program actually went to air: in other words Consolidated viewing).
- Average time spent viewing (ATV) is calculated as the daily average time (0200-2600) within the universe across all days in the calendar quarter multiplied by the factor of numbers of days in the quarter divided by three (3).
- Monthly reach for TV is based on the average of the calendar month cumulative reach audience (0200-2600) within the quarter.
- Video content is defined as a stream where both audio and video are detected. Video viewership excludes adult and advertising content, as well as downloaded content.
- Wherever possible, geographic and demographic data have been matched for like comparisons.
- Nielsen Australian Connected Consumers report 2015 (ACC) based on online national population aged 16+.

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





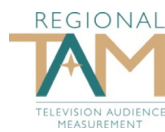
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