

# AUSTRALIAN MULTI-SCREEN REPORT

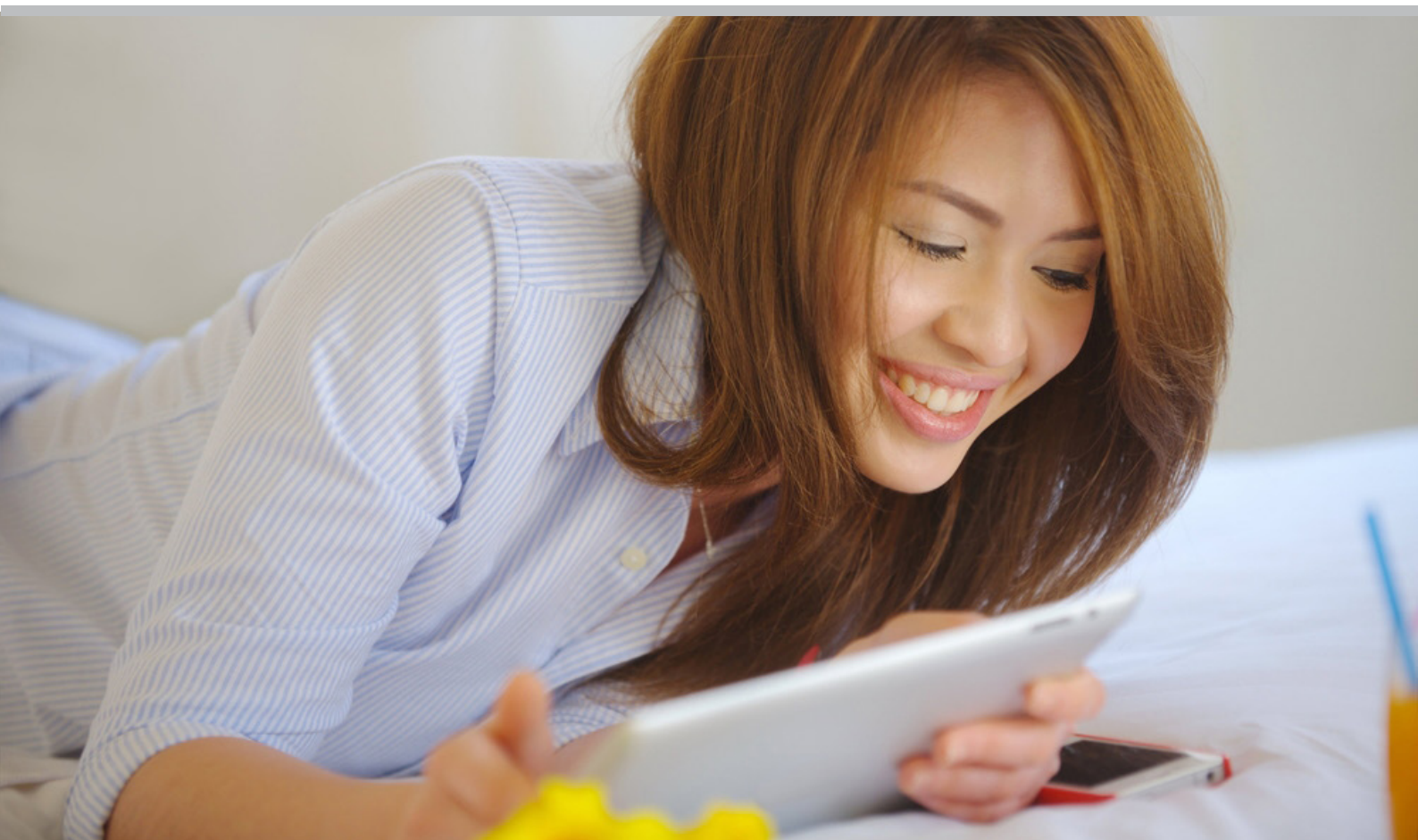
QUARTER 3  
2014



# TV AND OTHER VIDEO CONTENT ACROSS MULTIPLE SCREENS

The Q3 2014 edition of The Australian Multi-Screen Report provides the latest estimates of screen technology penetration in Australian homes as well as the time Australians spend viewing broadcast television on in-home TV sets, and TV and other video content on home computers.

The report also includes a special study on internet-connected mobile devices in the home: the presence of such devices, extent to which they are shared among household members, and the purposes for which they are used.



# TV VIEWING AND SCREEN TECHNOLOGIES IN AUSTRALIAN HOMES

In the third quarter of 2014 Australians watched on average a little over three hours of broadcast television – including free-to-air and subscription television – each day on in-home TV sets, consistent with average daily time spent viewing over much of the past decade.

Across the population, Australians viewed 96 hours and 58 minutes (96:58) of broadcast TV *every month* in the quarter, which is an increase of 1 hour and 7 minutes (1:07) per month on Q3 2013.

91.6 per cent of all in-home TV viewing in Q3 2014 was live – that is, viewed at the time the broadcast actually went to air. 8.4 per cent was watched in playback, meaning viewers recorded the material using a device such as a PVR or DVR and played it back *through their TV sets* within seven days of original broadcast time.

Both live viewing and playback viewing rose year-on-year: by 9 minutes, and 58 minutes, per month respectively.

While the increase in average monthly time spent viewing was mainly driven by children under 12 and people aged 50+, all age groups continue to spend the majority of their viewing time watching broadcast TV content on their in-home TV sets.

Broadcast TV viewing levels are supported by new technologies which give people greater flexibility and capacity to view live and recorded broadcast TV content:

- 55 per cent of homes have a recording device such as a PVR or DVR, and 15 per cent have two or more;
- Every Australian TV home can receive digital terrestrial television (DTT) broadcasts, and 95 per cent can receive DTT channels on every working household TV set, greatly expanding channel choice.

Household internet penetration has been steady for the past six quarters, at 80 per cent.

The progressive take-up of internet-capable devices – including televisions, tablets, smartphones and in-home computers – is creating further opportunities to watch broadcast TV and other video content.

Viewing on mobile devices however remains small compared to that on traditional television sets, reflecting people's preference to watch on the biggest available screen.



In Q3 2014 Australians aged 2+ spent an average 37 hours and 44 minutes (37:44) online each month on home and work computers. They devoted 7:30 to watching any online video on computers (including broadcast TV content and other video), compared to 5:18 in Q3 2013.

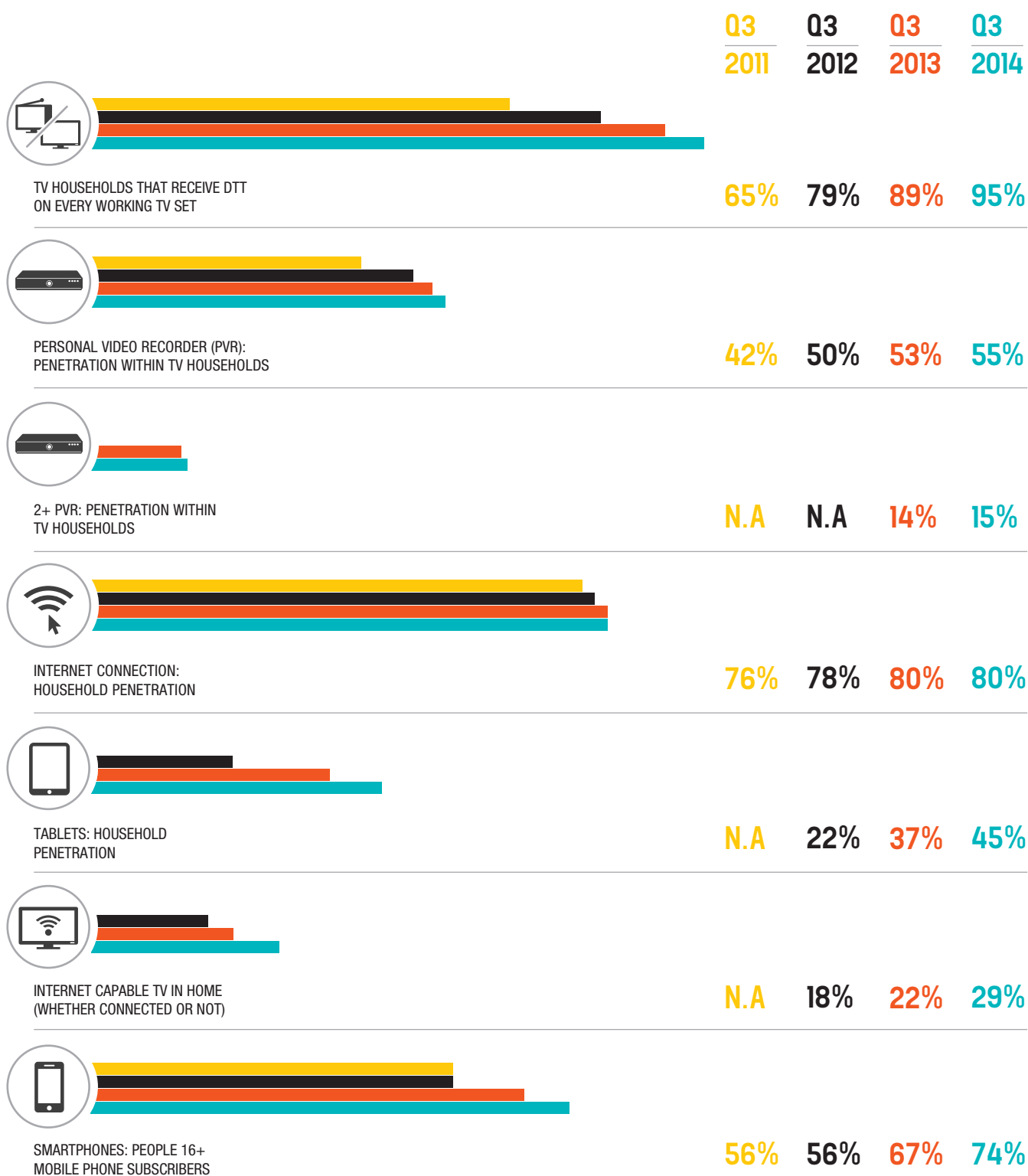
45 per cent of homes have tablet devices, up from 42 per cent in Q2 2014 and 37 per cent a year ago. Across the Australian online population aged 16+ people claim to spend 1:47 per month watching any online video on a tablet (Q4 2013).

74 per cent of Australians aged 16+ own a smartphone, compared to 67 per cent in Q3 2013. Across the Australian online population aged 16+ people report spending 1:56 per month watching any online video on a smartphone (Q4 2013).

29 per cent of homes have televisions with the capability to connect to the internet (whether actually connected or not), compared to 22 per cent a year ago.



## TECHNOLOGY PENETRATION



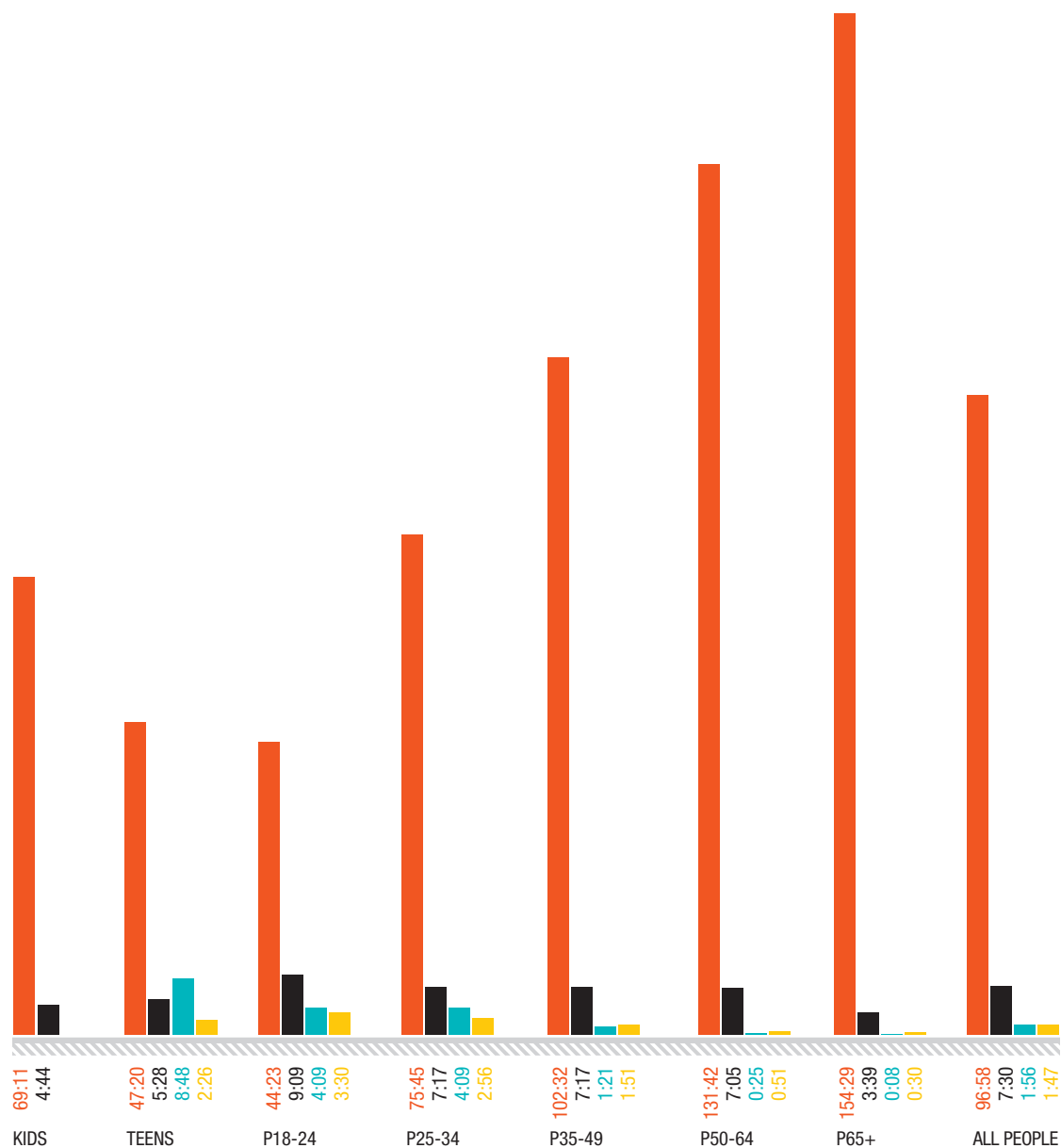
## VIDEO VIEWING, AVERAGE TIME SPENT PER MONTH, TV / PC / SMARTPHONE / TABLET





## 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 2013



WATCHING ANY  
ONLINE VIDEO  
ON A TABLET (P16+)  
Q4 2013

## TOTAL TV SCREEN USAGE

Australians' total use of the TV set has risen slightly year-on-year, averaging out at 16.6 per cent TARP across the whole day (Q4 2013 – Q3 2014).

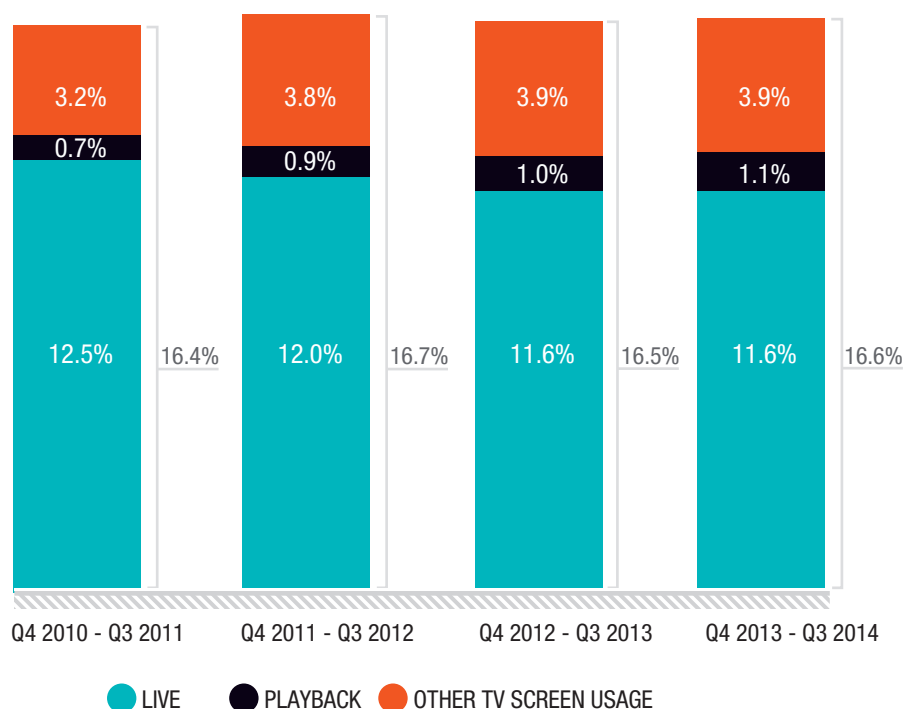
Live viewing has been steady over the past year, with playback rising slightly.

Other screen use is steady – that is, when people use their TV screens for purposes other than watching live or playback broadcast television. Examples include gaming, viewing over-the-top (OTT) internet-delivered services, internet browsing, or watching playback material they have recorded beyond seven days from original broadcast.

Over the past four years people have increased the amount of time they spend using their TV screens for non-broadcast purposes ('other screen use'). This reflects take-up of a range of devices that can be attached to TV sets, including games consoles, PVRs and OTT services, as well as the increasing penetration of TVs with the capability to connect with the internet: now in an estimated 29 per cent of homes.

As seen in the Q2 2014 edition of the Multi-Screen Report, such secondary TV screen use has not caused live or playback viewing to decline in the last two years. Rather, people are spending more time with their TV sets overall, and using their TVs for a growing variety of purposes.

## TARP - TOTAL INDIVIDUALS



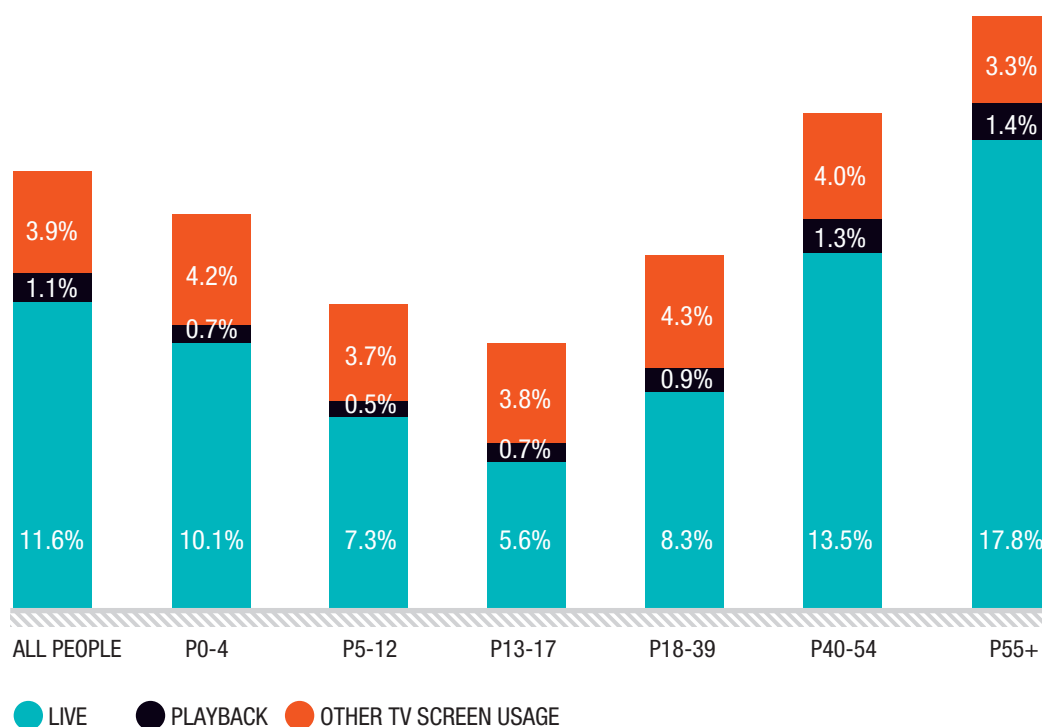
**Note:** A TARP, or Target Audience Rating Point, is the typical audience at any one period in time expressed as a percentage of the total potential audience. For example, on average at any one minute in the period Q4 2013 – Q3 2014 (far right bar, left) an estimated 16.6 per cent of Australians were using their in-home TV screens.

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





## TARP BY DEMOGRAPHIC Q4 2013 TO Q3 2014



# SPECIAL STUDY

## HOMES WITH INTERNET-CONNECTED MOBILE DEVICES

To understand how internet-connected mobile device users (tablet and smartphone users in particular) use and share those devices with other household members, a quantitative online research study was conducted in September, 2014.

1,800 people aged 14+ living in households with one or more internet-connected mobile devices were asked:

- What device(s) they have access to;
- Which device(s) they use;
- What activities they use the device(s) for;
- Which device(s) they share with other household members;
- Whether they use the device(s) for viewing video - either alone or with others.

Study participants were nationally representative by state, age and gender and live in homes with at least once internet-connected mobile device.

**Note:** This study focused on users of internet-connected mobile devices, rather than owners. To participate in the study, people had to have access to one or more internet-connected mobile devices (tablet, smartphone, iPod touch or Kindle/e-reader) within the home. This means, for example, that study participants without access to a tablet would have access to at least one other internet-connected device.

Survey questions and sample sizes appear below the relevant charts and tables throughout. All results are based on people aged 14+ in these homes unless otherwise specified.

# INTERNET-CONNECTED MOBILE DEVICE PENETRATION

Smartphones are the most common internet-connected mobile devices in study participants' homes: 91 per cent have one or more. Tablets are present in 60 per cent of participants' homes, with iPods and Kindle/e-readers in 22 per cent and 20 per cent, respectively.

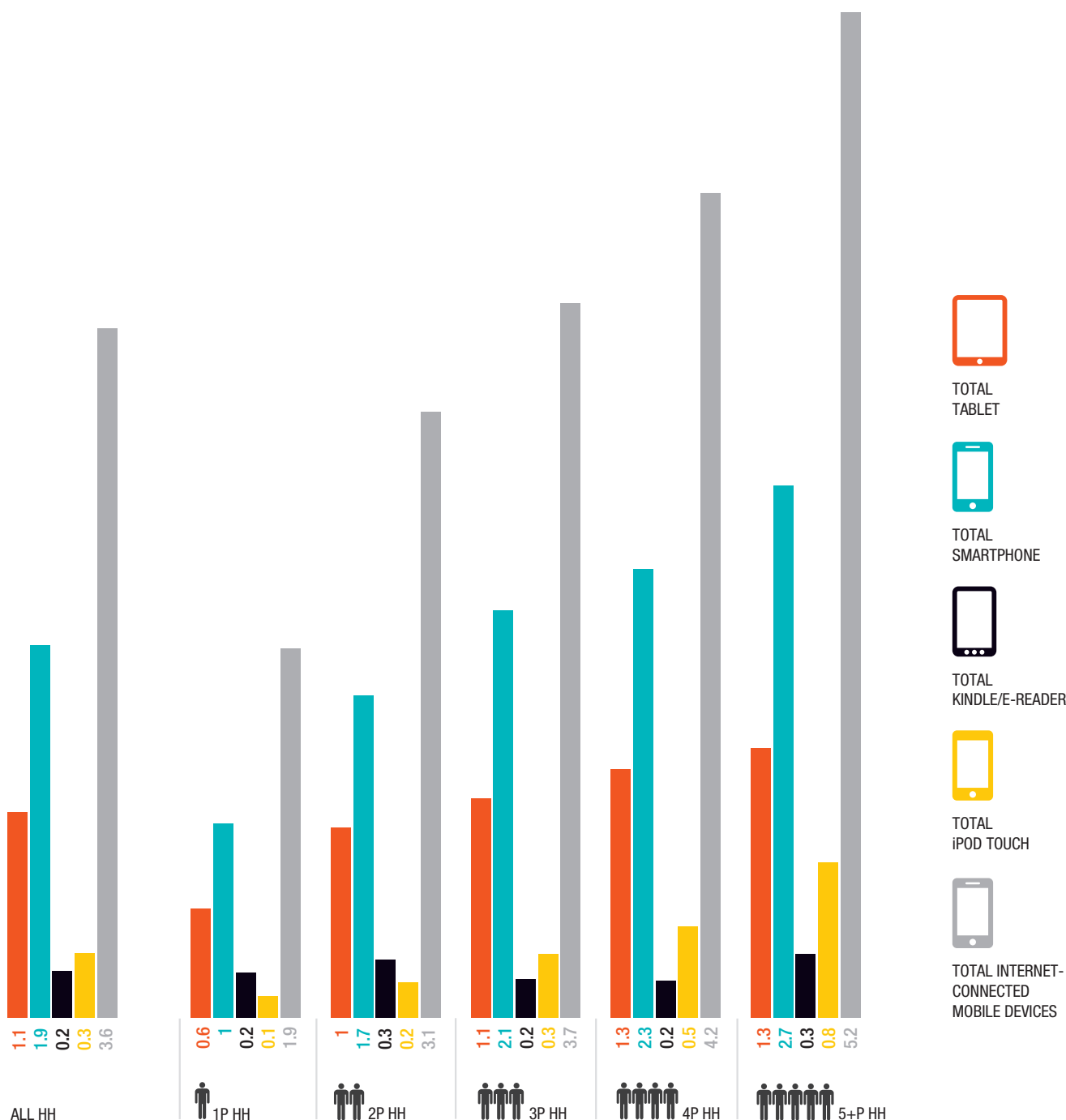
## INTERNET-CONNECTED MOBILE DEVICE PENETRATION



Q Do you or does anyone in your home have any of the following devices? N=1800 P14+

The average number of internet-connected mobile devices in the home directly correlates with the number of people in the home and household composition. That is, larger households, and those with children and teens, are more likely to have a greater number of internet-connected mobile devices.

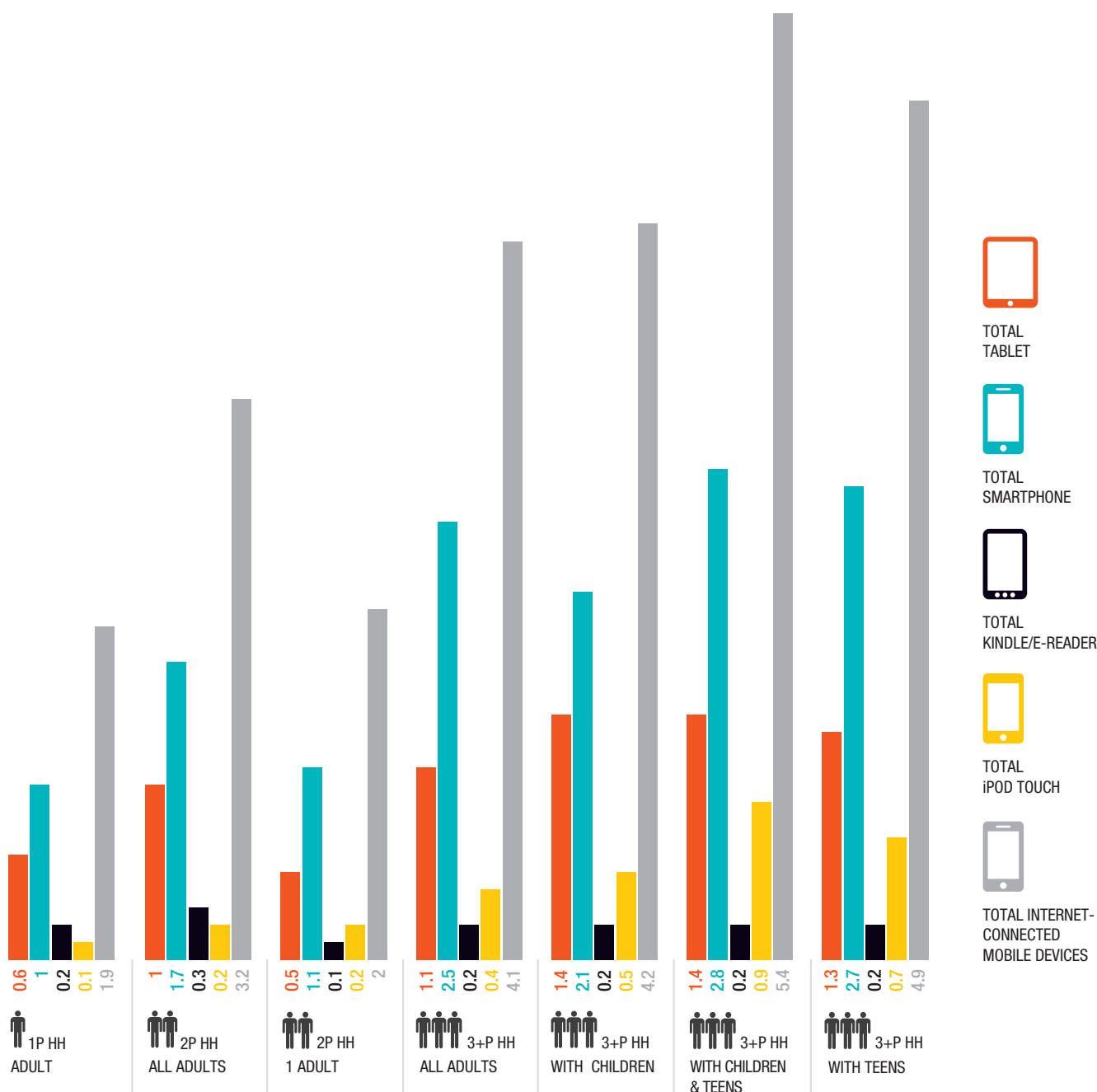
## AVERAGE NUMBER OF INTERNET-CONNECTED MOBILE DEVICES BY HOUSEHOLD SIZE



Q Do you or does anyone in your home have any of the following devices? N=1800 P14+



## AVERAGE NUMBER OF DEVICES BY HOUSEHOLD COMPOSITION – ALL ADULTS, ADULTS WITH CHILDREN AND TEENS



Q Do you or does anyone in your home have any of the following devices? N=1800 P14+ (Adults = P18+, Children = P0-13, Teens = P14-17)

# TABLET AND SMARTPHONE SHARING

The extent to which people share their internet-connected mobile devices with other household members varies by household size, household composition and age group.

Across all study participants, tablets are more likely to be shared than smartphones.

People in larger households are more likely to share tablets and smartphones with other household members. Accordingly people living in households with children and teens are considerably more likely to share their devices than are those in households comprised of people aged 18+ only (i.e. where no children or teens reside).

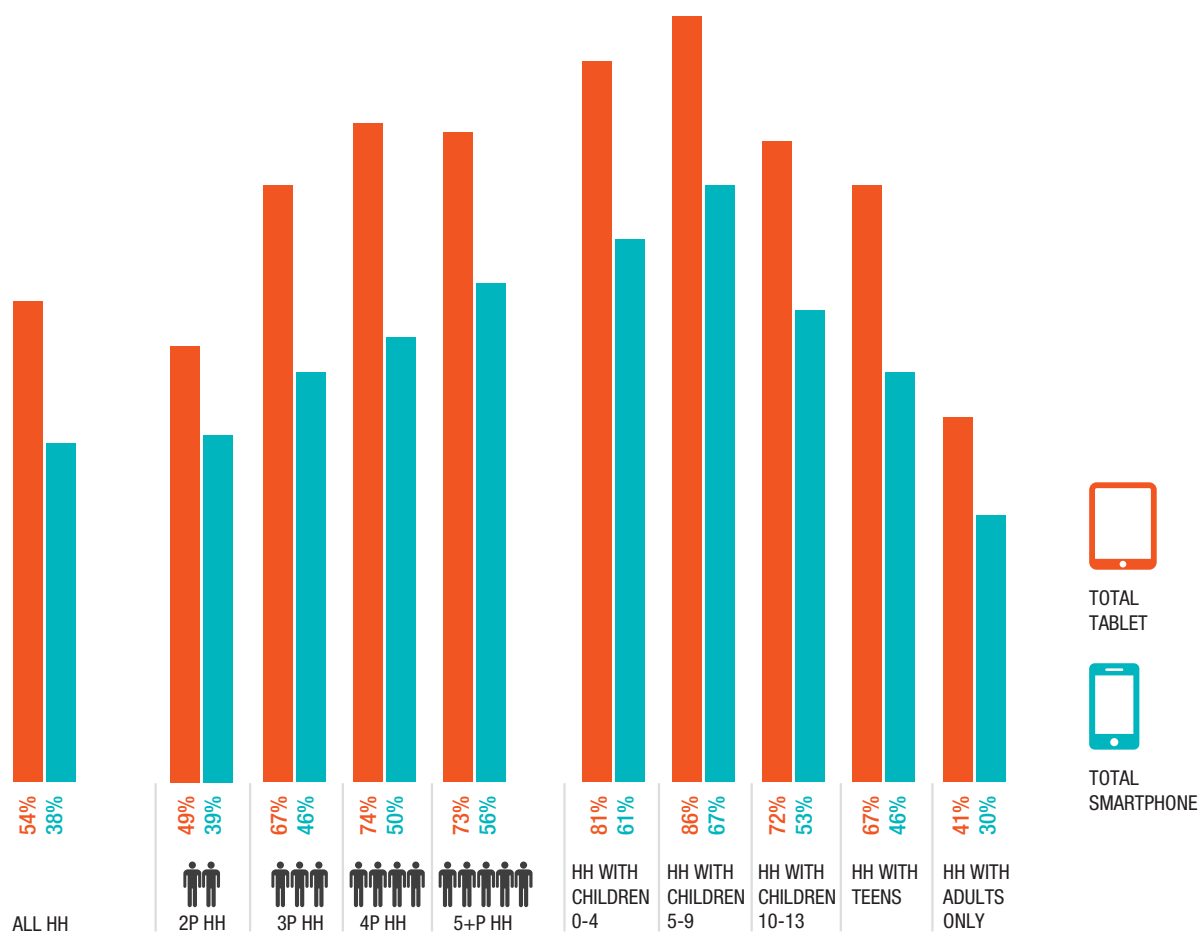
Overall, 54 per cent of study participants share tablets with other household members. This increases to approximately 75 per cent of people in households with four or more people and up to 86 per cent of people in households with children. The same overall patterns hold across household size and composition for smartphone sharing, albeit at lower levels.

Similarly, people aged 25-44 are most likely to share their tablet and/or smartphone with other members of their household, given the higher likelihood of a child or teen living in a home with at least one person aged 25-44.



**Note:** Study participants were asked which internet-connected mobile devices they use and which device of each type (e.g. tablet, smartphone, etc.) they use most frequently; they did not necessarily need to own the device. The device they used most frequently was then classified and referred to as the individual's device, i.e. 'their' device.

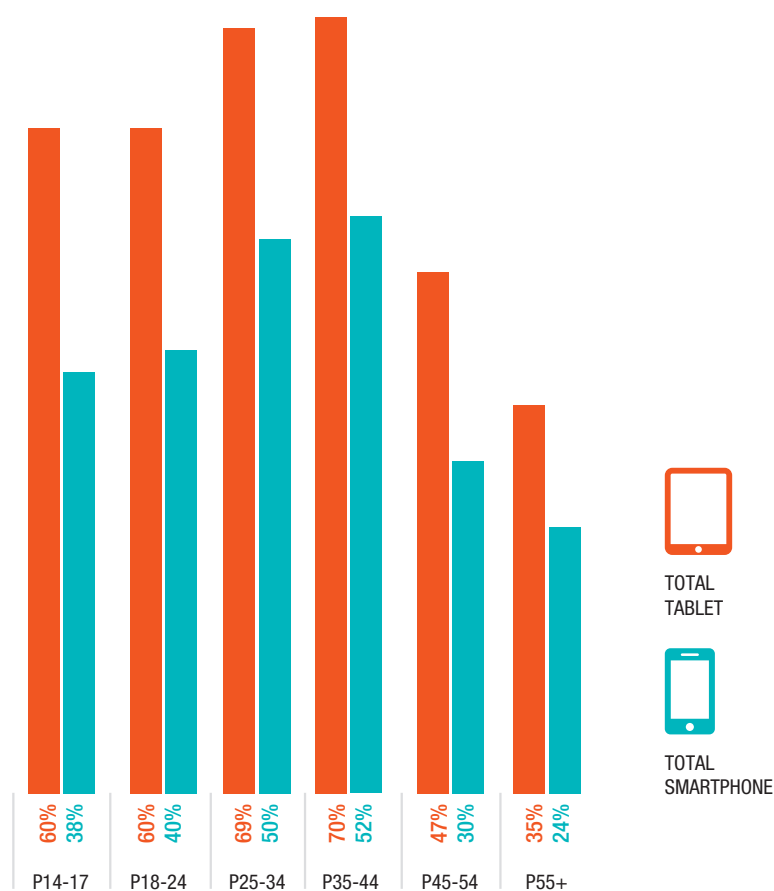
## TABLET AND SMARTPHONE SHARING BY HOUSEHOLD SIZE AND COMPOSITION



**Q** You will now be asked some questions about the tablet you use most frequently. It will be referred to as “your tablet”, even though you may not own it. Who else in your household uses your tablet? N = 881 tablet users aged 14+

**Q** You will now be asked some questions about the smartphone you use most frequently. It will be referred to as “your smartphone”, even though you may not own it. Who else in your household uses your smartphone? N = 1485 smartphone users aged 14+

## TABLET AND SMARTPHONE SHARING BY AGE GROUP



**Q** You will now be asked some questions about the tablet you use most frequently. It will be referred to as “your tablet”, even though you may not own it. Who else in your household uses your tablet? N = 881 tablet users aged 14+

**Q** You will now be asked some questions about the smartphone you use most frequently. It will be referred to as “your smartphone”, even though you may not own it. Who else in your household uses your smartphone? N = 1485 smartphone users aged 14+



The following two sections look at the tendency for people of different age groups to share their devices with other household members, taking into account the presence of other people and their respective ages.

## TABLETS

As stated previously, 25-44 year olds are the most likely to share their tablet with other household members. Conversely, people aged 55 and over are least likely to share their tablet (35 per cent).

People aged 14-17, 18-24 and 35-44 share their tablet with the greatest number of people in the home: on average with 1.6, 1.4 and 1.5 people respectively. They are also more likely to live in households with a greater number of people.



## PROPORTION OF TABLET USERS WHO SHARE AND AVERAGE NUMBER OF HOUSEHOLD MEMBERS WITH WHOM THEY SHARE

	AGE GROUP OF TABLET USER						
	14+	14-17	18-24	25-34	35-44	45-54	55+
Proportion of tablet users who share*	54%	60%	60%	69%	70%	47%	35%
Average number of people with whom tablet users share^	1.3	1.6	1.4	1.2	1.5	1.3	1.1
Average number of people in tablet users' household^	3.1	4.1	3.6	2.9	3.4	2.9	2.1

**Q** You will now be asked some questions about the tablet you use most frequently. It will be referred to as "your tablet", even though you may not own it. Who else in your household uses your tablet? \*N=881 tablet users aged 14+ ^ N=474 tablet users aged 14+ who share with others (i.e. excludes tablet users in 1 person households and tablet users in 2P+ households who do not share their tablet)

## UNDERSTANDING THE HOUSEHOLD COMPOSITION OF PEOPLE WHO SHARE TABLETS

Sharing tendencies vary by age group and are dictated by life stage as well as the number and ages of other household members.

The following two tables break down the age groups with whom tablet sharers live and provide an index of sharing tendencies, taking household composition into account.

A figure greater than 100 in the second table (Index: tablet sharers and tendency to share with other household members) indicates a higher tendency to share. The higher the figure the greater the tendency to do so (the converse holds for figures less than 100).

## AGE GROUPS WITH WHOM TABLET SHARERS LIVE

		AGE GROUP OF TABLET SHARER						
		14+	14-17	18-24	25-34	35-44	45-54	55+
AGE GROUP OF OTHER PEOPLE LIVING IN THE HOUSEHOLD	0-13	16%	17%	7%	24%	33%	13%	2%
	14-17	8%	12%	11%	4%	8%	14%	2%
	18-24	11%	13%	23%	7%	4%	17%	6%
	25-34	13%	3%	13%	42%	9%	6%	6%
	35-44	13%	17%	8%	9%	31%	8%	5%
	45-54	16%	29%	26%	5%	7%	28%	8%
	55+	22%	8%	11%	8%	6%	14%	70%

Overall, tablet users over the age of 14 who share their tablet with other household members are most likely to do so with people aged 25-44 and children 0-13.

Tablet users aged over 35 are more likely to share with children aged 0-13 than users under 35.

Tablet users over 25 are consistently more likely to share with people of a similar age, with users

aged 25-34 the most likely to share with other household members within the same age group.

Tablet users aged 25-34 and 45-54 are the most likely to share with teens 14-17, while users over the age of 55 are the most likely to share with 18-24 year-olds and other household members over the age 55.

## INDEX: TABLET SHARERS AND TENDENCY TO SHARE WITH OTHER HOUSEHOLD MEMBERS

		AGE GROUP OF TABLET SHARER						
		14+	14-17	18-24	25-34	35-44	45-54	55+
AGE GROUP WITH WHOM TABLET USERS SHARE	0+	100	100	100	100	100	100	100
	0-13	118	97	56	90	110	110	108 <sup>△</sup>
	14-17	93	96	87	121	79	124	49 <sup>△</sup>
	18-24	74	102	80	65	76	78	118
	25-34	129	55	124	123	118	21	34
	35-44	124	107	138	113	108	115	56
	45-54	91	109	116	48	19	111	53
	55+	80	90	94	74	18	96	116

<sup>△</sup> Note: these are small cells - i.e., there are relatively few people aged 0-17 living in homes with people 55+

# SMARTPHONES

Smartphone users aged 14+ are less likely to share their smartphones (38 per cent) than tablets (54 per cent) with other household members, bearing in mind that smartphone penetration is higher in study participants' homes than tablets. Across the various age groups, 14-24 year-olds share with the greatest number of household members.

Similar to tablets, people aged 25-44 are most likely to share their smartphone with other household members.





## PROPORTION OF SMARTPHONE USERS WHO SHARE AND AVERAGE NUMBER OF HOUSEHOLD MEMBERS WITH WHOM THEY SHARE

	AGE GROUP OF SMARTPHONE USER						
	14+	14-17	18-24	25-34	35-44	45-54	55+
Proportion of smartphone users who share*	38%	38%	40%	50%	52%	30%	24%
Average number of people with whom smartphone users share^	1.3	1.6	1.5	1.2	1.3	1.4	1.1
Average number of people in smartphone users' household^	3.0	4.1	3.5	2.8	3.3	2.7	2.1

**Q** You will now be asked some questions about the smartphone you use most frequently. It will be referred to as “your smartphone”, even though you may not own it. Who else in your household uses your smartphone? N = 1485 smartphone users aged 14+ \*N=1485 smartphone users aged 14+ ^ N=565 smartphone users aged 14+ who share with others (i.e. excludes smartphone users in 1 person households and smartphone users in 2P+ households who do not share their smartphone)

## UNDERSTANDING THE HOUSEHOLD COMPOSITION OF PEOPLE WHO SHARE SMARTPHONES

The following two tables break down the age groups with whom smartphone sharers live and provide an index of sharing tendencies, taking household composition into account.

A figure greater than 100 in the second table (Index: smartphone sharers and tendency

to share with other household members) indicates a higher tendency to share. The higher the figure the greater the tendency to do so (the converse holds for figures less than 100).

## AGE GROUPS WITH WHOM SMARTPHONE SHARERS LIVE

		AGE GROUP OF SMARTPHONE SHARER						
		14+	14-17	18-24	25-34	35-44	45-54	55+
AGE GROUP OF OTHER PEOPLE LIVING IN THE HOUSEHOLD	0-13	16%	17%	7%	24%	33%	13%	2%
	14-17	8%	12%	11%	4%	8%	14%	2%
	18-24	11%	13%	23%	7%	4%	17%	6%
	25-34	13%	3%	13%	42%	9%	6%	6%
	35-44	13%	17%	8%	9%	31%	8%	5%
	45-54	16%	29%	26%	5%	7%	28%	8%
	55+	22%	8%	11%	8%	6%	14%	70%

Overall, smartphone users over the age of 14 who share their smartphone with other household members are most likely to do so with people aged 25-44 (similar to sharing patterns for tablets) and 18-24.

14-17 year-olds are most likely to share with 18-24 year-olds, whereas 18-24s are most

likely to share with 25-34 year olds. 25-34 year olds are most likely to share with other household members within their own age group. Across all age groups smartphone users are least likely to share with children 0-13 and in addition, in the case of those aged under 55, with people over 55.

## INDEX: SMARTPHONE SHARERS AND TENDENCY TO SHARE WITH OTHER HOUSEHOLD MEMBERS

		AGE GROUP OF SMARTPHONE SHARER						
		14+	14-17	18-24	25-34	35-44	45-54	55+
AGE GROUP WITH WHOM SMARTPHONE USERS SHARE	0+	100	100	100	100	100	100	100
	0-13	57	40	59	44	51	66	0 <sup>Δ</sup>
	14-17	98	89	95	112	120	85	48 <sup>Δ</sup>
	18-24	115	135	101	103	146	131	132
	25-34	172	102	164	141	170	118	66
	35-44	132	130	99	124	125	115	128
	45-54	93	120	99	51	114	113	39
	55+	72	63	68	66	76	69	110

<sup>Δ</sup> Note: these are small cells - i.e., there are relatively few people aged 0-17 living in homes with people 55+

# ACTIVITIES UNDERTAKEN ON TABLETS AND SMARTPHONES

The following charts illustrate the most common activities people say they have undertaken on their tablets and smartphones, whether via websites or apps, over the course of a month.

While usage varies by device, the top activities among people aged 14+ are similar across tablets and smartphones: email; accessing search engines; social networking; getting news and information; accessing maps or navigation information; and video/entertainment.

Accessing TV networks' catch-up TV websites and apps is more common on tablets than on smartphones, across both websites and apps. Over the course of a month, 20 per cent of tablet users aged 14+ claim to have visited a catch-up TV website and 15 per cent have used a catch-up TV app. In comparison, the proportion of smartphone users visiting catch-up TV via TV networks' websites and apps drops to 8 per cent and 5 per cent, respectively.

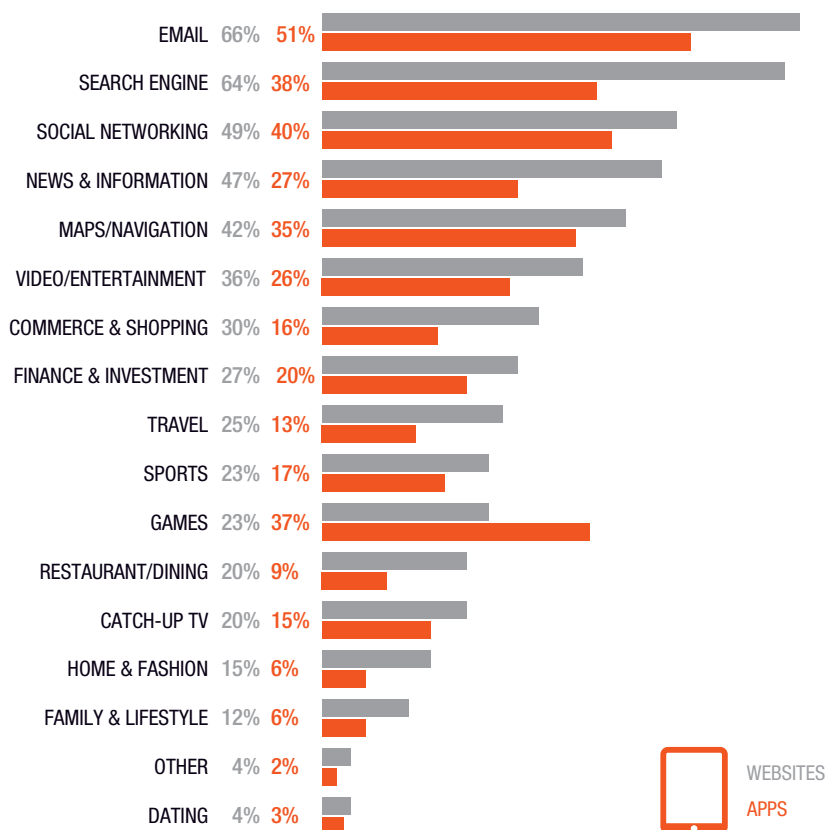


## TABLET USERS' WEBSITE AND APP USE

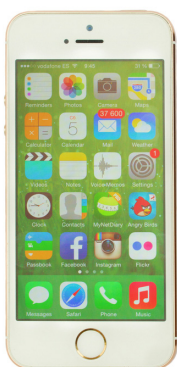


Q Please indicate if in the past month you have visited any of these types of websites using an internet browser on your tablet. N = 881 tablet users aged 14+

Q In the past month, have you used any of these types of apps on your tablet? N = 881 tablet users aged 14+

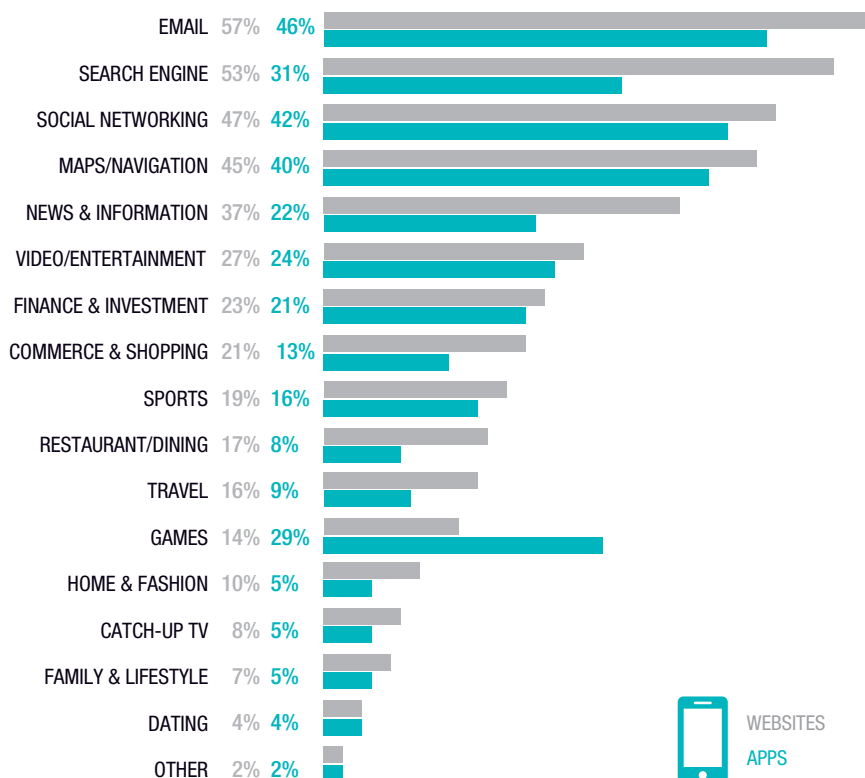


## SMARTPHONE USERS' WEBSITE AND APP USE



Q Please indicate if in the past month you have visited any of these types of websites using an internet browser on your smartphone. N=1485 smartphone users 14+

Q In the past month, have you used any of these types of apps on your smartphone? N=1485 smartphone users 14+





## CATCH-UP TV WEBSITE AND APP USE BY DEMOGRAPHIC

Overall, people aged 14-24 are most likely to visit catch-up TV websites, while people aged 45-54 are most likely to use catch-up TV apps on a tablet. Across all age groups, smartphones are less likely to be used than tablets to watch catch-up TV. Those that do are most likely to be aged between 14-17 and 25-44.

CATCH-UP TV WEBSITE & APP USE		14+	14-17	18-24	25-34	35-44	45-54	55+
TABLET	WEBSITE	20%	26%	24%	20%	20%	20%	18%
	APP	15%	16%	17%	15%	13%	19%	13%
SMARTPHONE	WEBSITE	8%	13%	7%	11%	10%	6%	4%
	APP	5%	8%	4%	9%	8%	4%	2%

Q Please indicate if in the past month you have visited any of these types of websites using an Internet browser on your tablet.

N = 881 tablet users aged 14+

Q In the past month, have you used any of these types of apps on your tablet? N = 881 tablet users aged 14+

Q Please indicate if in the past month you have visited any of these types of websites using an Internet browser on your smartphone.

N=1485 smartphone users 14+

Q In the past month, have you used any of these types of apps on your smartphone? N=1485 smartphone users 14+

## VIDEO VIEWING ON TABLETS AND SMARTPHONES

Taking a closer look at study participants' viewing of any video content, they are more likely to use tablets than smartphones for this purpose. 14-34 year-olds are the most frequent video viewers on both tablets and smartphones, with people over age 35 being significantly less likely to say they have ever watched any video content on either device – particularly so on smartphones.

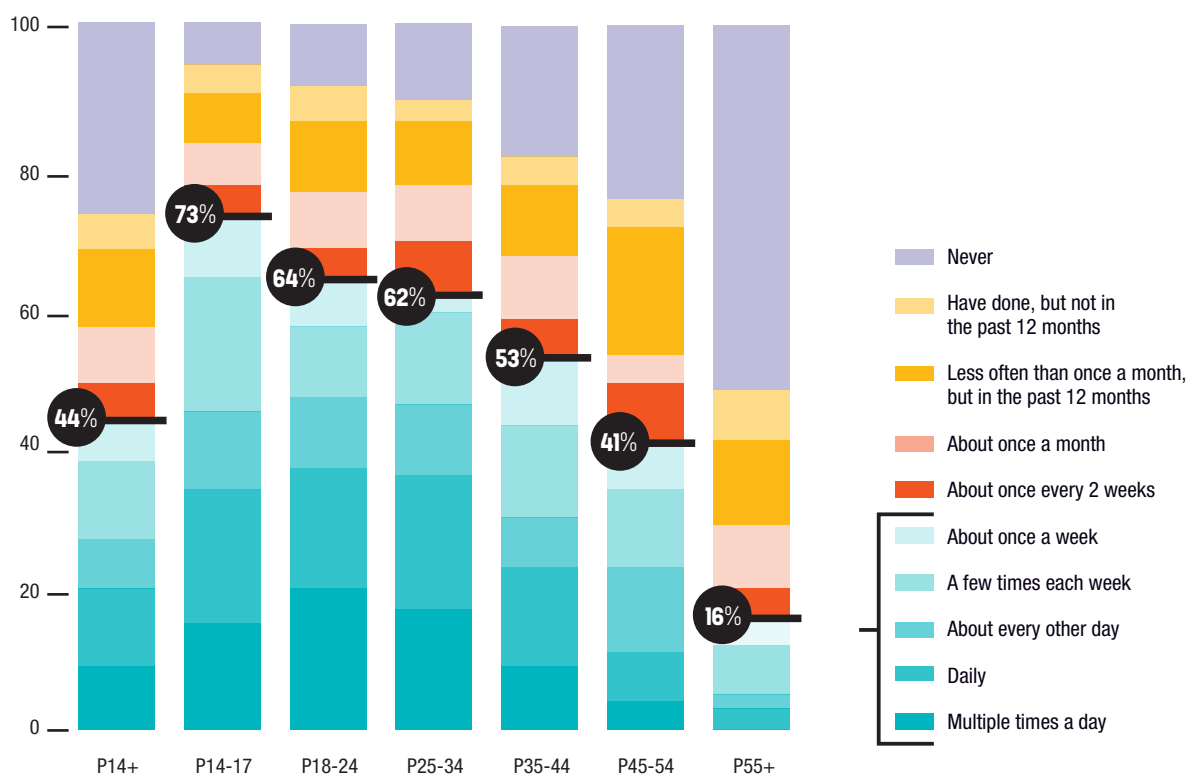
# TABLETS

Of people who use their tablets to view any video content, 14-17s do so most frequently: 73 per cent use their tablet to watch video at least once each week, followed by 18-24s and 25-34s.

People over age 55 are least likely to have ever viewed video content on their tablet.



## FREQUENCY OF VIDEO VIEWING ON TABLETS



Q How often do you watch videos on your tablet? Please think about professionally produced content broadcast on TV networks as well as user produced videos. This might include drama, reality shows, news, sports, movies etc. across websites and apps. N=881 tablet users 14+

## FREQUENCY OF VIDEO VIEWING ON TABLETS (SUMMARY)

VIDEO VIEWING ON TABLETS	14+	14-17	18-24	25-34	35-44	45-54	55+
At least once a day	20%	34%	37%	36%	23%	11%	3%
Less often than daily, but at least once a week	24%	39%	27%	26%	30%	30%	13%
Less often than once a week, but at least once a month	13%	10%	12%	15%	14%	12%	13%
Less often than once a month, but in the past 12 months	11%	7%	10%	9%	10%	18%	12%
Have done so but not in the past 12 month	5%	4%	5%	3%	4%	4%	7%
Never	27%	6%	11%	10%	20%	26%	53%

Note: due to whole number rounding, not all percentages add up to 100 per cent.

Q How often do you watch videos on your tablet? Please think about professionally produced content broadcast on TV networks as well as user produced videos. This might include drama, reality shows, news, sports, movies etc. across websites and apps. N=881 tablet users 14+

### Note:

- At least once a day: includes multiple times a day and daily
- Less often than daily, but at least once a week: includes about every other day, a few times each week and about once a week
- Less often than once a week, but at least once a month: includes about once every two weeks and about once a month

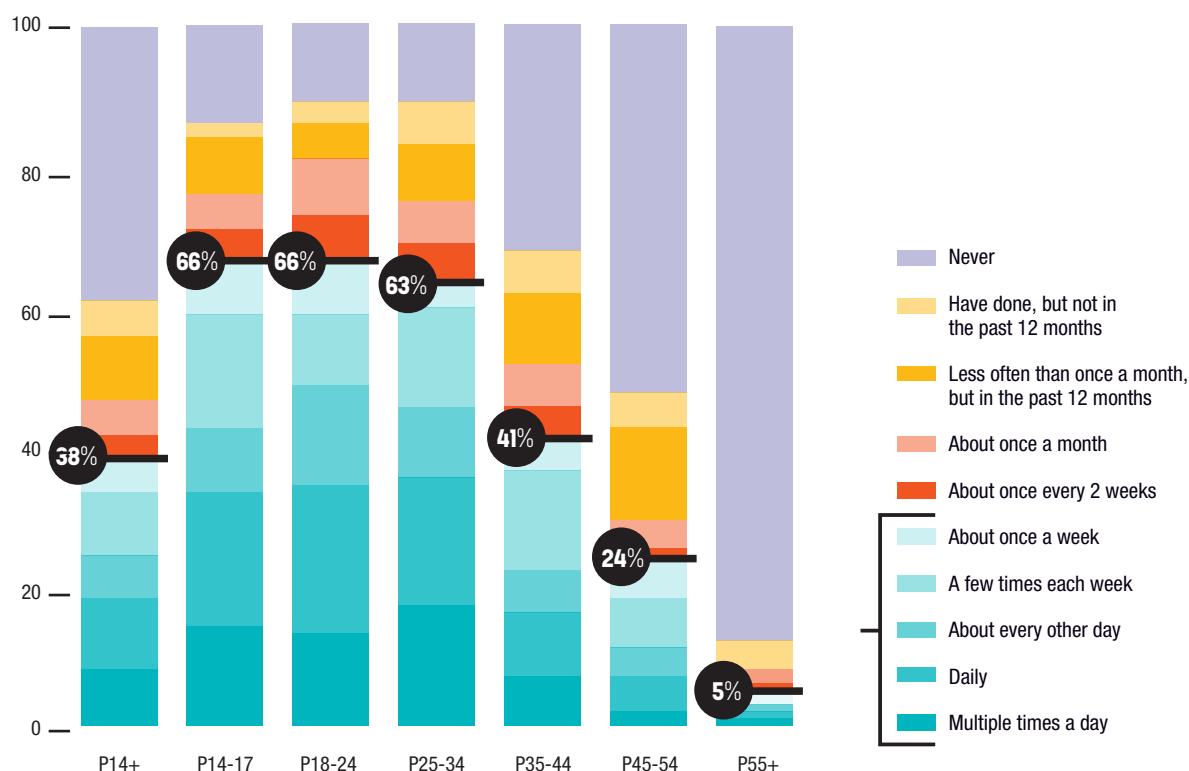
# SMARTPHONES

Similar to tablets, 14-17 year-olds and 18-24 year-olds view video on smartphones most often: 66 per cent say they watch in this way at least once a week, closely followed by 25-34 year-olds.

There is a significant and progressively increasing drop in the proportion of people over age 35 who say they ever watch video content on their smartphone.



## FREQUENCY OF VIDEO VIEWING ON SMARTPHONES



Q How often do you watch videos on your smartphone? Please think about professionally produced content broadcast on TV networks as well as user produced videos. This might include drama, reality shows, news, sports, movies etc. across websites and apps. N=1485 smartphone users 14+

## FREQUENCY OF VIDEO VIEWING ON SMARTPHONES (SUMMARY)

VIDEO VIEWING ON SMARTPHONES	14+	14-17	18-24	25-34	35-44	45-54	55+
At least once a day	18%	33%	34%	35%	16%	7%	1%
Less often than daily, but at least once a week	20%	33%	32%	28%	25%	17%	4%
Less often than once a week, but at least once a month	8%	9%	14%	11%	10%	5%	3%
Less often than once a month, but in the past 12 months	9%	8%	5%	8%	10%	13%	10%
Have done so but not in the past 12 month	5%	2%	3%	6%	6%	5%	4%
Never	40%	16%	11%	11%	32%	52%	78%

Note: due to whole number rounding, not all percentages add up to 100 per cent.

Q How often do you watch videos on your smartphone? Please think about professionally produced content broadcast on TV networks as well as user produced videos. This might include drama, reality shows, news, sports, movies etc. across websites and apps. N=1485 smartphone users 14+

### Note:

- At least once a day: includes multiple times a day and daily
- Less often than daily, but at least once a week: includes about every other day, a few times each week and about once a week
- Less often than once a week, but at least once a month: includes about once every two weeks and about once a month

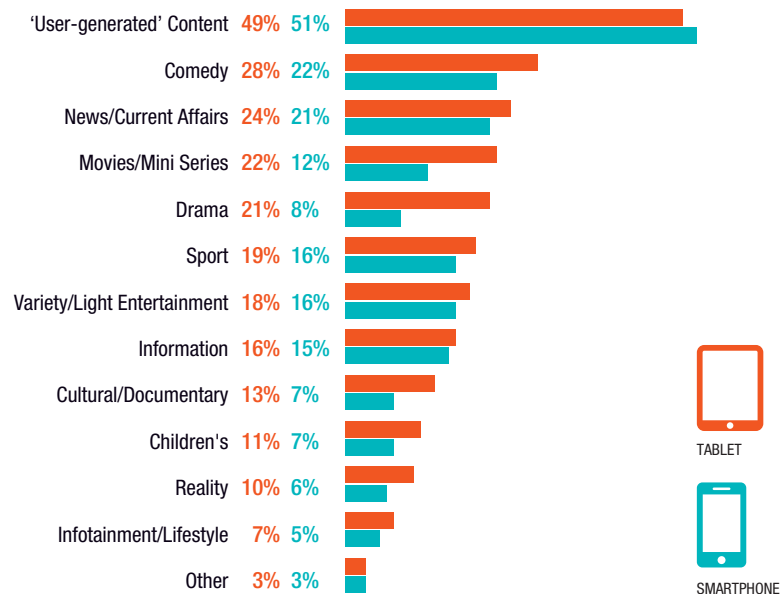


# VIDEO GENRES

User-generated content is the most popular type of video viewed on tablets and smartphones.

As noted in the previous section, people are more likely to use tablets than smartphones to watch video, and particularly for certain genres, such as movies/mini-series, drama, cultural/documentary, children's and reality content.

## VIDEO GENRES VIEWED ON TABLETS AND SMARTPHONES



Q What sorts of videos do you watch on your tablet? N= 642 tablet users 14+ who have ever watched video on their tablet

Q What sorts of videos do you watch on your smartphone? N= 893 smartphone users 14+ who have ever watched video on their smartphone

The following tables compare the TV genres that study participants watch overall with the video genres tablet and smartphone users watch on their respective devices.

Aside from user-generated content, the type of video tablet and smartphone users view on these devices reflects the genres that are viewed on the TV set overall. The incidence of viewing video across all genres on a tablet is significantly lower than TV, with smartphone video viewing lower still.

## GENRES WATCHED ON A TABLET

TABLET USERS: GENRES WATCHED	TV SET	TABLET
News/Current Affairs	75%	24%
Movies/Mini Series	67%	22%
Comedy	61%	28%
Drama	60%	21%
Sport	51%	19%
Cultural/Documentary	51%	13%
Variety/Light Entertainment	50%	18%
Reality	34%	10%
Information	30%	16%
Infotainment / Lifestyle	27%	7%
Children's	21%	11%

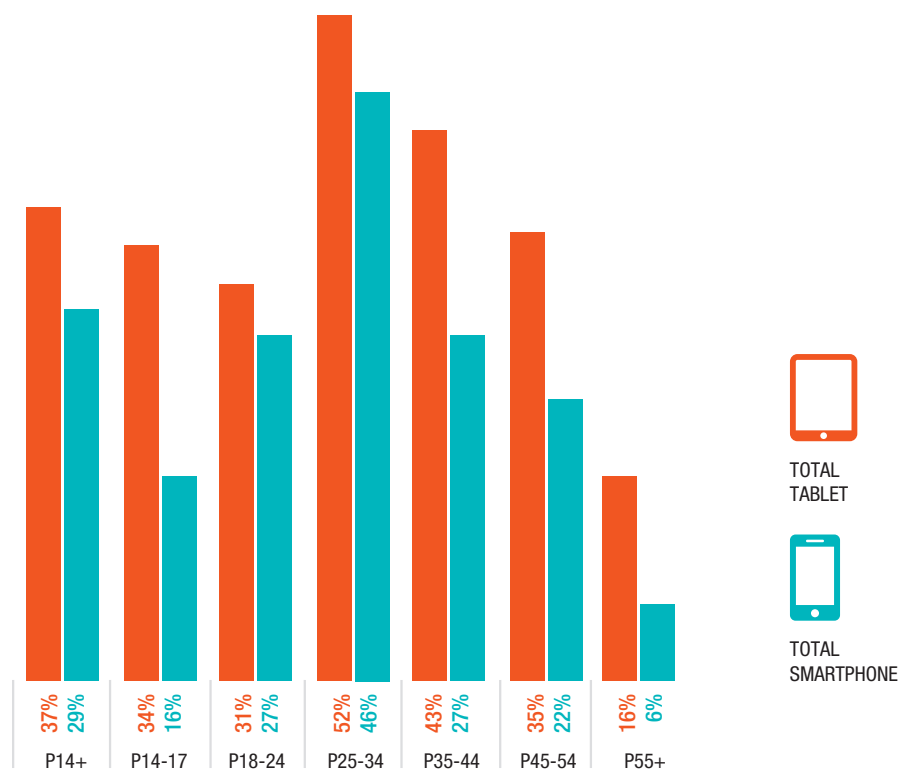
## GENRES WATCHED ON A SMARTPHONE

SMARTPHONE USERS: GENRES WATCHED	TV SET	SMARTPHONE
News/Current Affairs	73%	21%
Movies/Mini Series	65%	12%
Comedy	62%	22%
Drama	59%	8%
Variety/Light Entertainment	50%	16%
Sport	49%	16%
Cultural/Documentary	49%	7%
Reality	35%	6%
Information	26%	15%
Infotainment / Lifestyle	26%	5%
Children's	20%	7%

- Q What sorts of videos do you watch on your tablet? N= 642 tablet users 14+ who have ever watched video on their tablet  
 Q What sorts of videos do you watch on your smartphone? N= 893 smartphone users 14+ who have ever watched video on their smartphone  
 Q What types of TV content do you watch on your TV set/s? N=1800 P14+

## VIDEO VIEWED ON TABLETS AND SMARTPHONES WITH OTHER HOUSEHOLD MEMBERS

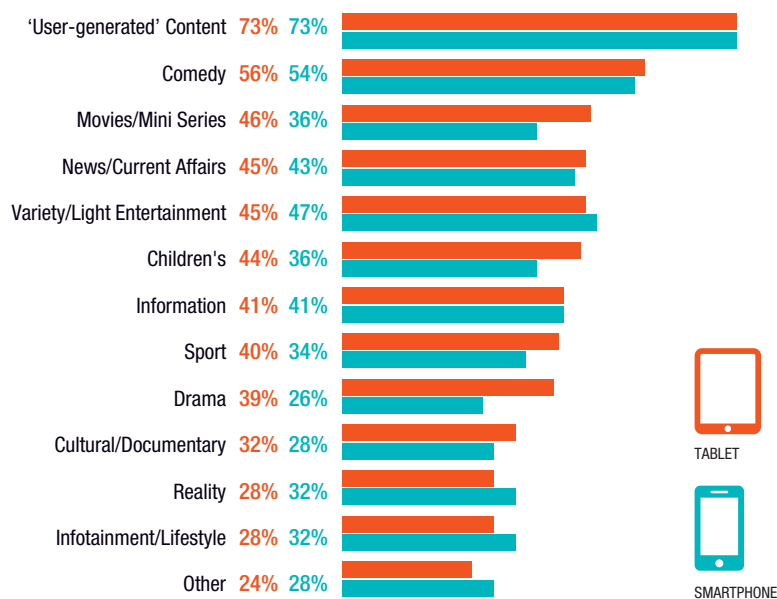
Shared video viewing on both tablets and smartphones (that is, people who view any video content together with another household member using the same device) is relatively low overall, with people aged 25-44 the most likely to do so across both devices. Those who view video content with others are more likely to do so on tablets than smartphones.



- Q Do you watch videos together with other members of your household on your tablet? N=571 tablet users 14+ who have ever watched video on their tablet and who live with at least one other household member
- Q Do you watch videos together with other members of your household on your smartphone?? N= 788 smartphone users 14+ who have ever watched video on their smartphone and who live with at least one other household member

## VIDEO GENRES VIEWED ON TABLETS AND SMARTPHONES WITH OTHER HOUSEHOLD MEMBERS

When sharing video viewing, user-generated content followed by comedy, movies/mini-series, news/current affairs, variety/light entertainment and children's are the most popular genres. Children's programming ranks significantly higher on shared viewing occasions compared to solo viewing.



Q Who do you watch those videos with? N=209 tablet users 14+ who live with at least one other household member and have ever watched video on their tablet with another household member

Q Who do you watch those videos with? N=226 smartphone users 14+ who live with at least one other household member and have ever watched video on their smartphone with another household member

# SIMULTANEOUS TABLET AND SMARTPHONE USE WITH TV

This study also aimed to understand the level of simultaneous device use with TV. Overall, tablets are more likely to be used to access the internet or apps while users watch TV than smartphones. 86 per cent of tablet users aged 14 and over report having ever done so in the last 12 months compared to 77 per cent of smartphone users.

The frequency with which tablet and smartphone users simultaneously use their devices with TV also varies by age group: 14-17 year-olds and 25-34 year-olds use their tablets and smartphones while watching TV most frequently.

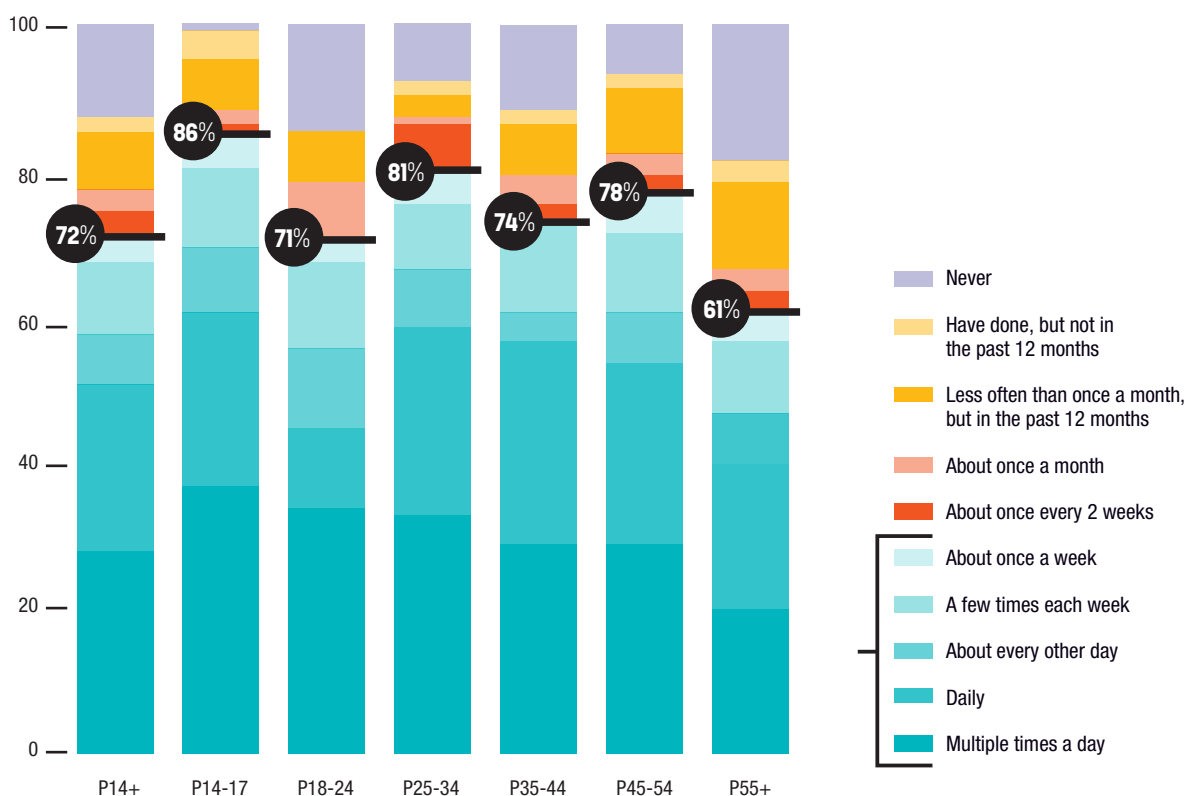
## SIMULTANEOUS TV AND TABLET USE

Of people who use their tablets to access websites and apps at the same time as they watch TV, 14-17 year-olds do so most frequently. People 55 and over are the least likely to do so.





## FREQUENCY OF SIMULTANEOUS TV AND TABLET USE



Q How often would you say you use your tablet for accessing the internet, using apps or social media (i.e. excluding making or receiving phone calls or texting) while watching television on your TV set? N = 881 tablet users aged14+

## FREQUENCY OF SIMULTANEOUS TV AND TABLET USE (SUMMARY)

SIMULTANEOUS TV AND TABLET USE	14+	14-17	18-24	25-34	35-44	45-54	55+
At least once a day	51%	61%	45%	59%	57%	54%	40%
Less often than daily, but at least once a week	21%	25%	26%	22%	17%	24%	21%
Less often than once a week, but at least once a month	6%	3%	12%	7%	6%	5%	6%
Less often than once a month, but in the past 12 months	8%	7%	7%	3%	7%	9%	12%
Have done so but not in the past 12 month	2%	4%	0%	2%	2%	2%	3%
Never	11%	1%	9%	8%	11%	8%	18%

Note: due to whole number rounding, not all percentages add up to 100 per cent.

Q How often would you say you use your tablet for accessing the internet, using apps or social media (i.e. excluding making or receiving phone calls or texting) while watching television on your TV set? N = 881 tablet users aged14+

### Note:

- At least once a day: includes multiple times a day and daily
- Less often than daily, but at least once a week: includes about every other day, a few times each week and about once a week
- Less often than once a week, but at least once a month: includes about once every two weeks and about once a month

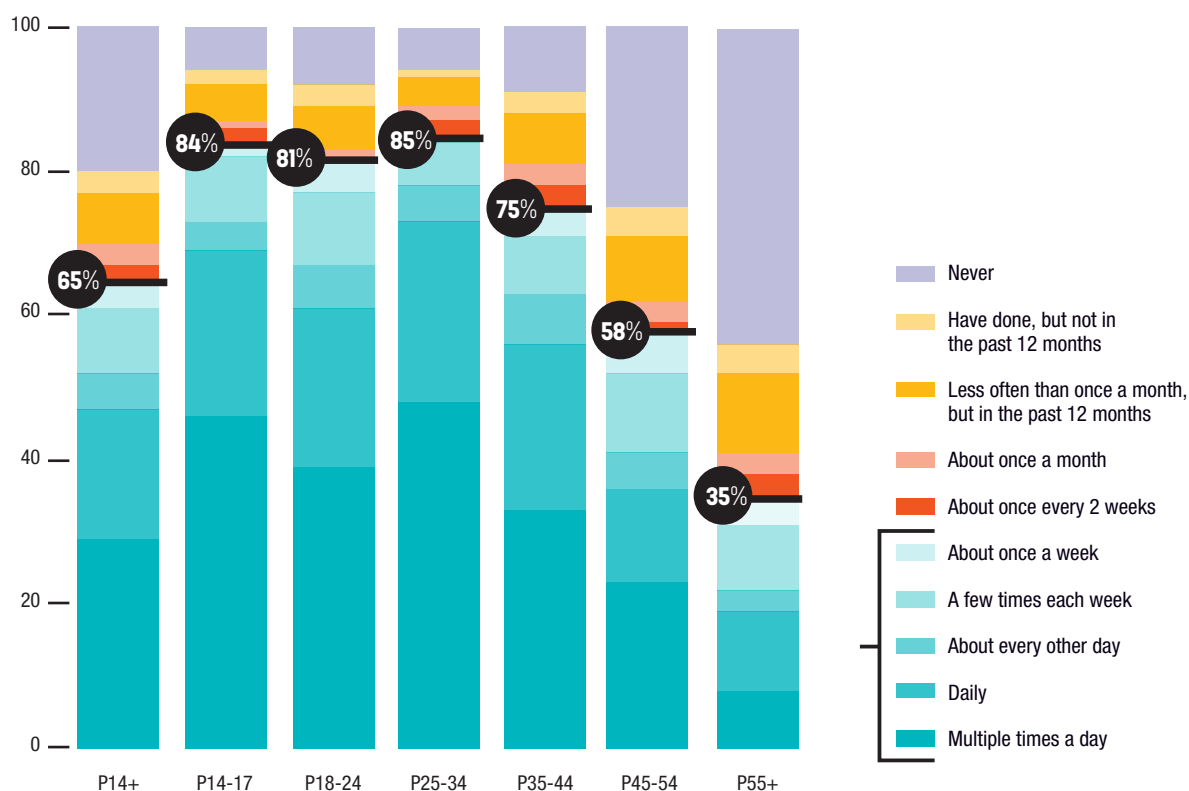
# SIMULTANEOUS TV AND SMARTPHONE USE

People aged 14-34 use their smartphones to access websites and apps while watching television more frequently than other age groups: more than 80 per cent do so at least once a week.

Smartphone users aged 55+ are significantly less likely than other age groups to have ever used their smartphone while watching TV (43 per cent say they have never done so).



## FREQUENCY OF SIMULTANEOUS TV AND SMARTPHONE USE



Q How often would you say you use your smartphone for accessing the internet, using apps or social media while watching television on your TV set (excluding making or receiving phone calls or texting)? N=1485 smartphone users 14+

## FREQUENCY OF SIMULTANEOUS TV AND SMARTPHONE USE (SUMMARY)

SIMULTANEOUS TV AND SMARTPHONE USE	14+	14-17	18-24	25-34	35-44	45-54	55+
At least once a day	47%	69%	61%	73%	56%	36%	19%
Less often than daily, but at least once a week	18%	15%	20%	12%	19%	22%	16%
Less often than once a week, but at least once a month	5%	3%	2%	4%	6%	4%	6%
Less often than once a month, but in the past 12 months	7%	5%	6%	4%	7%	9%	11%
Have done so but not in the past 12 month	3%	2%	3%	1%	3%	4%	4%
Never	20%	7%	8%	5%	9%	25%	43%

Note: due to whole number rounding, not all percentages add up to 100 per cent.

Q How often would you say you use your smartphone for accessing the internet, using apps or social media while watching television on your TV set (excluding making or receiving phone calls or texting)? N=1485 smartphone users 14+

### Note:

- At least once a day: includes multiple times a day and daily
- Less often than daily, but at least once a week: includes about every other day, a few times each week and about once a week
- Less often than once a week, but at least once a month: includes about once every two weeks and about once a month

# CONCLUSION

The findings from this study are consistent with research presented in earlier editions of the Australian Multi-Screen Report. While audiences increasingly watch video content on mobile screens, such viewing is not the primary activity people use their internet-connected mobile devices for. Moreover younger people are more likely to view any video on tablets and smartphones than older age groups.

This study reflects the behaviour of 1800 people aged 14+ in households with access to one or more internet-connected mobile devices; the results should not be extrapolated to represent all homes. OzTAM and Regional TAM Establishment Surveys show 20 per cent of Australian homes do not have internet connections, and tablets are present in fewer than half of all homes (45 per cent). Nielsen estimates 74 per cent of Australians aged 16+ own a smartphone.



## KEY OBSERVATIONS

**TABLE 1: TECHNOLOGY PENETRATION**

	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014
Completely DTT: Penetration within TV households (Homes capable of receiving DTT on each working TV within the home)	89%	91%	93%	94%	95%
Personal video recorder (PVR): Penetration within TV households	53%	53%	54%	55%	55%
2+PVR: Penetration within TV households	14%	14%	14%	14%	15%
Internet Connection: Household penetration <sup>1</sup>	80%	80%	80%	80%	80%
Tablets: Household penetration	37%	40%	42%	42%	45%
Internet Capable TV in home (Whether connected or not)	22%	23%	27%	27%	29%
Smartphones: People 16+ <sup>2</sup>	67%	68%	69%	71%	74%

**TABLE 2: MONTHLY TIME SPENT (HH:MM)**

	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014
Watching TV in the home <sup>3</sup>	95:51	92:39	93:16	97:03	96:58
Watching Playback TV	7:10	6:47	7:15	7:58	8:08
Online time spent per person <sup>4</sup>	38:45	37:39	38:41	39:27	37:44
Watch video on Internet <sup>5</sup>	5:18	5:52	7:48	8:08	7:30
Watching online video on a smartphone <sup>6</sup>	N.A.	1:56	N.A.	N.A.	N.A.
Watching online video on a tablet <sup>6</sup>	N.A.	1:47	N.A.	N.A.	N.A.

<sup>1</sup> 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.

<sup>2</sup> Source: Nielsen Consumer & Media View national population aged 16+ (Q4 2013 onwards).

<sup>3</sup> 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.

<sup>4</sup> Source: Nielsen Online Ratings – Hybrid Surfing from Q2 2013 onwards. 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.

<sup>5</sup> 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.

<sup>6</sup> Smartphone 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**

	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014
Watching TV in the home <sup>7</sup>	21,735	21,750	21,859	21,920	21,789
Watching Playback TV	9,712	9,745	10,946	11,210	11,352
Online unique audience <sup>8</sup>	16,744	16,193	16,235	17,394	17,585
Watch video on Internet <sup>9</sup>	12,313	12,080	12,323	13,516	13,377
Owning/using a mobile phone <sup>10</sup>	17,504	17,303	17,394	17,409	17,739
Watching online video on smartphone <sup>11</sup>	N.A.	2,824	N.A.	N.A.	N.A.
Watching online video on tablet <sup>11</sup>	N.A.	2,209	N.A.	N.A.	N.A.

**TABLE 4: A MONTH IN THE LIFE – Q3 2014**

	KIDS <sup>12</sup>	TEENS <sup>13</sup>	P18-24	P25-34	P35-49	P50-64	P65+	ALL PEOPLE <sup>15</sup>
Watching TV in the home <sup>14</sup>	69:11	47:20	44:23	75:45	102:32	131:42	154:29	96:58
Q3 2013	67:20	49:17	46:37	77:28	104:26	127:56	149:15	95:51
Watching Playback TV	4:48	4:40	4:44	7:14	9:24	11:05	11:01	8:08
Q3 2013	4:11	4:26	4:36	6:41	8:46	9:34	8:41	7:10
Online time spent per person <sup>15</sup>	4:56	9:58	36:23	41:09	42:22	45:21	45:21	37:44
Watch video on Internet <sup>16</sup>	4:44	5:28	9:09	7:17	7:17	7:05	3:39	7:30
Watching online video on a smartphone <sup>17</sup>	N.A.	8:48	4:09	4:09	1:21	0:25	0:08	1:56
Q4 2013	N.A.	8:48	4:09	4:09	1:21	0:25	0:08	1:56
Watching online video on tablet <sup>17</sup>	N.A.	2:26	3:30	2:56	1:51	0:51	0:30	1:47
Q4 2013	N.A.	2:26	3:30	2:56	1:51	0:51	0:30	1:47

<sup>7</sup> 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.

<sup>8</sup> Source: Nielsen Online Ratings – Hybrid Surfing from Q2 2013 onwards. 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.

<sup>9</sup> 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.

<sup>10</sup> Mobile phone ownership and usage sourced from Nielsen Consumer & Media View (people aged 14+).

<sup>11</sup> Smartphone and tablet video source: Nielsen Australian Connected Consumers report from 2013-2014 (February 2014 edition) - national figures produced annually citing 16% of the online population aged 16+ for smartphone video and 8% for tablet video. Audience figure calculated using national online active audience of 14,808,513 from Nielsen Online Ratings (January 2014).

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

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

<sup>14</sup> 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.

<sup>15</sup> Source: Nielsen Online Ratings – Hybrid Surfing from Q2 2013 onwards. 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.

<sup>16</sup> 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.

<sup>17</sup> 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 (4.3). Figure relates to online video only.

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

KIDS	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014
Watching TV in the home <sup>14</sup>	67:20	66:18	65:06	69:49	69:11
Watching Playback TV	4:11	3:42	4:02	4:27	4:48
Online time spent per person <sup>15</sup>	7:38	8:04	5:36	7:27	4:56
Watching video on Internet <sup>16</sup>	3:55	5:35	7:05	7:20	4:44
Watching online video on a smartphone <sup>17</sup> (Q4 2013)	N.A.	N.A.	N.A.	N.A.	N.A.
Watching online video on a tablet <sup>17</sup> (Q4 2013)	N.A.	N.A.	N.A.	N.A.	N.A.

TEENS	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014
Watching TV in the home <sup>14</sup>	49:17	47:33	45:12	46:44	47:20
Watching Playback TV	4:26	4:30	4:13	4:40	4:40
Online time spent per person <sup>15</sup>	14:41	13:01	9:55	11:27	9:58
Watching video on Internet <sup>16</sup>	6:33	6:27	6:40	6:33	5:28
Watching online video on a smartphone <sup>17</sup> (Q4 2013)	N.A.	8:48	N.A.	N.A.	N.A.
Watching online video on a tablet <sup>17</sup> (Q4 2013)	N.A.	2:26	N.A.	N.A.	N.A.

P18-24	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014
Watching TV in the home <sup>14</sup>	46:37	43:24	45:14	45:50	44:23
Watching Playback TV	4:36	4:22	4:42	4:55	4:44
Online time spent per person <sup>15</sup>	42:04	42:29	40:37	40:00	36:23
Watching video on Internet <sup>16</sup>	10:50	12:23	16:28	13:02	9:09
Watching online video on a smartphone <sup>17</sup> (Q4 2013)	N.A.	4:09	N.A.	N.A.	N.A.
Watching online video on a tablet <sup>17</sup> (Q4 2013)	N.A.	3:30	N.A.	N.A.	N.A.

P25-34	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014
Watching TV in the home <sup>14</sup>	77:28	71:20	74:21	77:56	75:45
Watching Playback TV	6:41	6:03	6:56	7:17	7:14
Online time spent per person <sup>15</sup>	43:57	43:12	42:16	44:18	41:09
Watching video on Internet <sup>16</sup>	7:26	7:55	10:05	9:49	7:17
Watching online video on a smartphone <sup>17</sup> (Q4 2013)	N.A.	4:09	N.A.	N.A.	N.A.
Watching online video on a tablet <sup>17</sup> (Q4 2013)	N.A.	2:56	N.A.	N.A.	N.A.

P35-49	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014
Watching TV in the home <sup>14</sup>	104:26	98:56	98:06	103:05	102:32
Watching Playback TV	8:46	7:51	8:13	9:06	9:24
Online time spent per person <sup>15</sup>	41:33	40:43	42:48	42:50	42:22
Watching video on Internet <sup>16</sup>	4:53	5:28	7:17	8:15	7:17
Watching online video on a smartphone <sup>17</sup> (Q4 2013)	N.A.	1:21	N.A.	N.A.	N.A.
Watching online video on a tablet <sup>17</sup> (Q4 2013)	N.A.	1:51	N.A.	N.A.	N.A.

P50-64	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014
Watching TV in the home <sup>14</sup>	127:56	125:19	124:37	130:21	131:42
Watching Playback TV	9:34	9:13	9:40	10:59	11:05
Online time spent per person <sup>15</sup>	41:17	40:27	43:55	43:57	45:21
Watching video on Internet <sup>16</sup>	3:09	3:23	5:20	7:00	7:05
Watching online video on a smartphone <sup>17</sup> (Q4 2013)	N.A.	0:25	N.A.	N.A.	N.A.
Watching online video on a tablet <sup>17</sup> (Q4 2013)	N.A.	0:51	N.A.	N.A.	N.A.

P65+	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014
Watching TV in the home <sup>14</sup>	149:15	148:42	150:36	152:20	154:29
Watching Playback TV	8:41	9:04	9:51	10:42	11:10
Online time spent per person <sup>15</sup>	26:36	26:59	28:48	28:26	45:21
Watching video on Internet <sup>16</sup>	1:58	2:29	2:42	3:13	3:39
Watching online video on a smartphone <sup>17</sup> (Q4 2013)	N.A.	0:08	N.A.	N.A.	N.A.
Watching online video on a tablet <sup>17</sup> (Q4 2013)	N.A.	0:30	N.A.	N.A.	N.A.

ALL PEOPLE	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014
Watching TV in the home <sup>14</sup>	95:51	92:39	93:16	97:03	96:58
Watching Playback TV	7:10	6:47	7:15	7:58	8:08
Online time spent per person <sup>15</sup>	38:45	37:39	38:41	39:27	37:44
Watching video on Internet <sup>16</sup>	5:18	5:52	7:48	8:08	7:30
Watching online video on a mobile phone <sup>17</sup> (Q4 2013)	N.A.	1:56	N.A.	N.A.	N.A.
Watching online video on a tablet <sup>17</sup> (Q4 2013)	N.A.	1:47	N.A.	N.A.	N.A.

**TABLE 5: VIDEO AUDIENCE COMPOSITION [BY AGE AND GENDER] – Q3 2014**

	KIDS	TEENS	P18-24	P25-34	P35-49	P50-64	P65+	FEMALES	MALES
On Traditional TV <sup>18</sup>	12%	3%	5%	11%	22%	25%	23%	53%	47%
Q3 2013	11%	3%	5%	12%	23%	24%	22%	53%	47%
On Internet <sup>19</sup>	2%	3%	11%	19%	30%	24%	12%	49%	51%

<sup>18</sup> 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).

<sup>19</sup> 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.

## 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) through the TV set 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.
- 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+.
- Smartphone 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.





## FOR MORE INFORMATION

Should you require more information about any content in this report, please refer to:



**DOUG PEIFFER**

Chief Executive Officer, OzTAM

[doug.peiffer@oztam.com.au](mailto:doug.peiffer@oztam.com.au)

**or MARGARET FEARN**

Principal, Fearnace Media

[margaret@fearnacemedia.com](mailto:margaret@fearnacemedia.com)

---



**DEBORAH WRIGHT**

Chairperson, Regional TAM

[dwright@nbn tv.com.au](mailto:dwright@nbn tv.com.au)

---



**ERICA BOYD**

Senior Vice President

Cross Platform Audience Measurement

SEANAP, Nielsen

[erica.boyd@nielsen.com](mailto:erica.boyd@nielsen.com)

---

This report and all data within it is Copyright © Regional TAM, OzTAM, Nielsen, 2014. All rights reserved.

The document as-a-whole may be shared and redistributed freely, and users are welcome to quote from it with appropriate sourcing: Australian Multi-Screen Report Q3, 2014.

Please contact one of the people listed above for permission to re-use contents of the report in any other manner, including reproduction of tables, graphics or sections within it.