

# AUSTRALIAN MULTI-SCREEN REPORT

QUARTER 4  
2014



# TELEVISION AND OTHER VIDEO VIEWING ACROSS MULTIPLE SCREENS

The Q4 2014 edition of the Australian Multi-Screen Report provides the latest estimates across major age groups of:

- the time Australians spend viewing broadcast television on in-home TV sets;
- people's total use of the television screen, and;
- tablet and smartphone viewing.

It also updates the estimated take-up of technology in Australian homes.

The report illustrates how Australians' use of various screens is evolving as these devices become more common and create

greater flexibility to watch broadcast TV and other video content when and where people wish.

The interplay between these screen types in turn impacts the amount of time people spend using them.

The data show that while viewing on connected mobile devices continues to grow it remains small relative to the time Australians spend watching broadcast television on in-home TV sets.





# TECHNOLOGY IN AUSTRALIAN HOMES

The fourth quarter of 2014 saw household take-up of internet-capable devices reach a new high.

**Internet-capable TVs** have the fastest adoption rate: 30 per cent of homes now have a 'smart' or 'hybrid' TV – whether actually connected to the internet or not (23 per cent a year ago).

All Australian television homes can access **digital terrestrial broadcast (DTT)** channels on at least one household TV set and 95 per cent of TV homes can access DTT channels on every working household set.

**PVR** penetration is slightly higher year-on-year at 56 per cent of homes

(53 per cent in Q4 2013), with 15 per cent owning two or more PVRs (14 per cent a year ago).

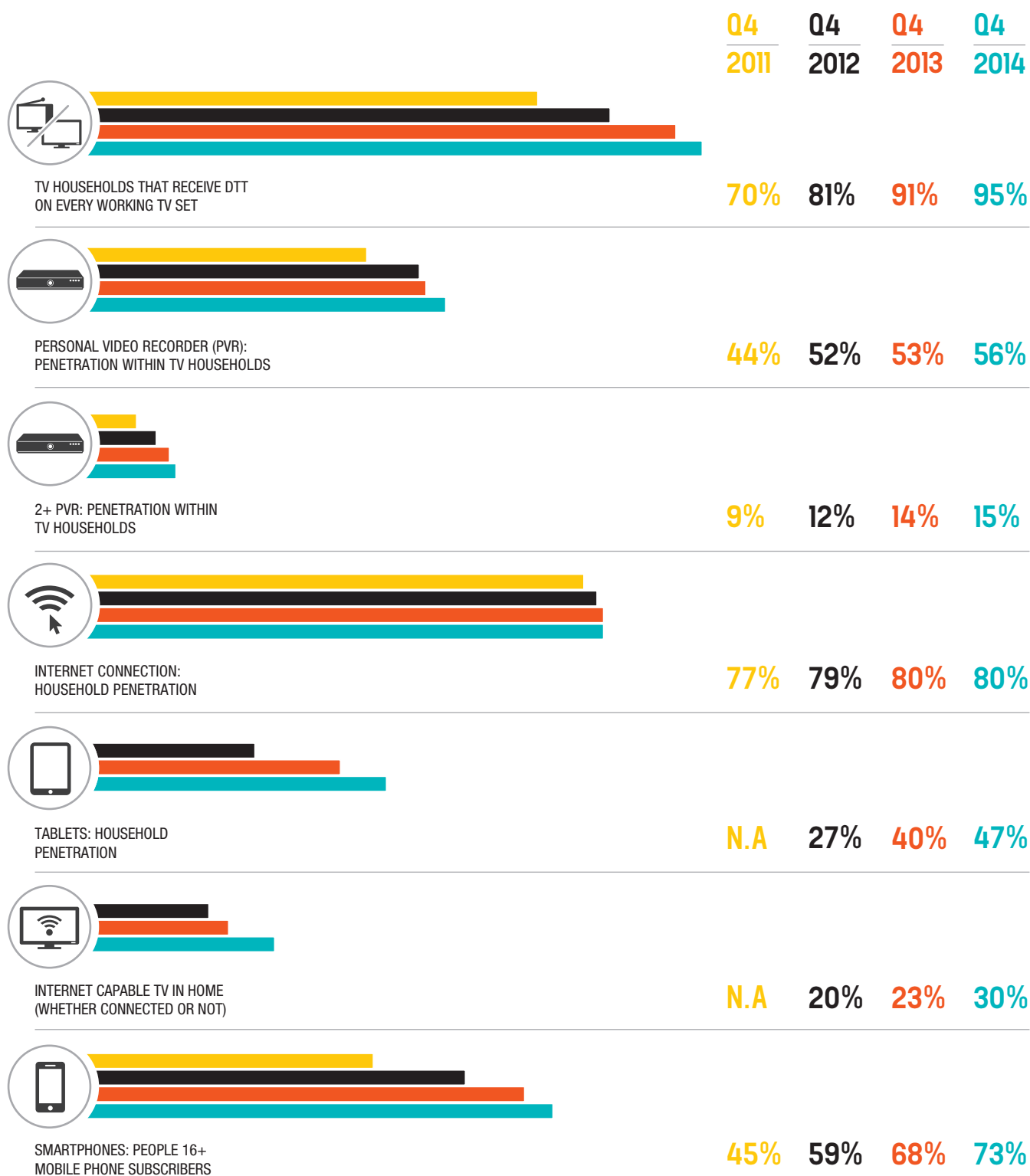
Take-up of **tablets** continues to grow although not as quickly as in previous quarters. An estimated 47 per cent of homes now have at least one tablet (40 per cent a year earlier, and 45 per cent in Q3 2014).

73 per cent of Australians aged 16 and over own a **smartphone** (68 per cent in Q4 2013).

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



## TECHNOLOGY PENETRATION



# VIEWING ON VARIOUS SCREENS – A YEAR IN REVIEW

With the close of 2014, the Q4 Multi-Screen Report compares the most recent calendar year to earlier years.

Across 2014 Australians viewed an average of 3 hours and 6 minutes (3:06) of broadcast television *per day*, similar to levels in previous years.

This includes free-to-air and subscription channels, both **live** (that is, viewed at the time the broadcast actually went to air) and **playback** (that is, viewing of recorded content at normal speed *through the TV set* within seven days of the original broadcast using a device such as a PVR or DVR).

Age groups watching more television in 2014 compared to the previous year include children 12 and under, and adults aged 50-plus. Across the overall population viewing declined 2014 vs 2013 by an average of 31 seconds per day.

The vast majority of all TV viewing is live, with less than 10 per cent viewed in playback mode.

Reflecting the take-up of PVRs, all age groups have increased their playback viewing in each of the past four calendar years, with 13-17s' playback viewing level in the latest year-on-year period.

	CONSOLIDATED "WATCHING TV IN THE HOME" (HH:MM)			PLAYBACK "WATCHING PLAYBACK TV" (HH:MM)		
	2013 AVG MONTHLY	2014 AVG MONTHLY	YOY	2013 AVG MONTHLY	2014 AVG MONTHLY	YOY
ALL PEOPLE	94:42	94:26	-0:16	7:09	7:41	0:31
WOMEN	99:49	99:28	-0:21	8:09	8:49	0:40
MEN	89:32	89:22	-0:10	6:08	6:32	0:23
P0-12	65:41	67:01	1:19	4:03	4:28	0:24
P13-17	48:38	45:36	-3:02	4:32	4:32	0:00
P18-24	45:35	43:52	-1:42	4:30	4:38	0:07
P25-34	76:58	74:06	-2:52	6:36	6:54	0:17
P35-49	101:12	99:24	-1:47	8:48	8:51	0:03
P50-64	127:11	127:55	0:43	9:36	10:22	0:45
P65+	150:20	151:22	1:01	8:42	10:26	1:43

**Note:** Watching TV in the home includes live + playback viewing within seven days of original broadcast.

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

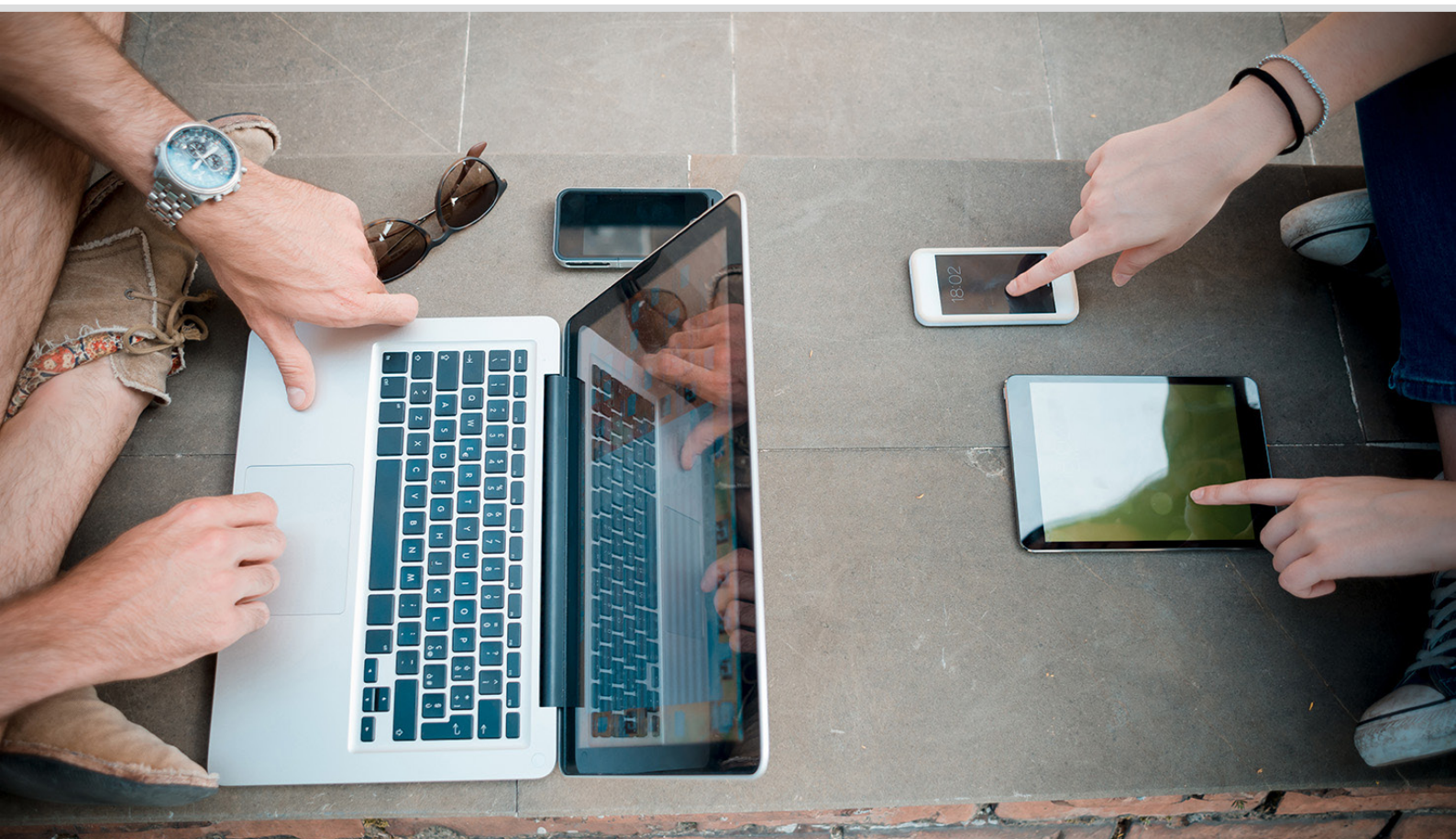
**Looking at Q4 2014 specifically:** Australians watched an average 90 hours and 27 minutes (90:27) of broadcast TV (free-to-air and subscription channels) *each month* in the quarter. That compares to 92:39 in Q4 2013.\*

Seasonality has long been a factor in television viewing levels: people watch more television in winter and less in summer and with the start of daylight saving time.

91.9 per cent of TV viewing in the quarter was live (83:06) and 8.1 per cent (7:21) was watched

in playback. Compared to Q4 2013 playback increased by 34 minutes, with all major age groups aside from 18-24s watching more TV in playback mode.

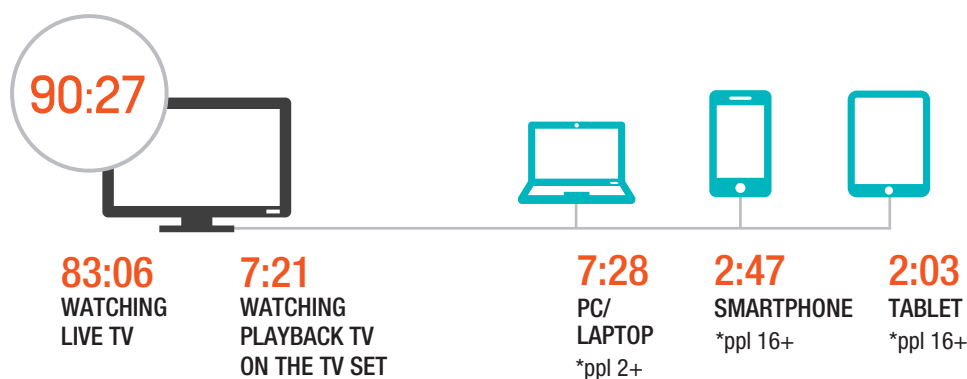
Television remains the primary household screen, as people gravitate to the biggest and best available display. Across all devices, and including broadcast and non-broadcast content, 88 per cent of all video viewing takes place on TV sets.



\* When first published this report stated 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 7 hours and 28 minutes (7:28) per month in the quarter viewing video online on a PC or laptop (e.g., streamed video such as internet-delivered catch up TV as well as other content such as YouTube), up from 5:52 in Q4 2013. In total they spent 37:08 online each month on work and home computers, 31 minutes less in the same quarter a year ago (37:39).

Across the Australian online population aged 16 and above people claim to spend 2:03 watching any online video on a tablet each month, up from 1:47 per month in Q4 2013.

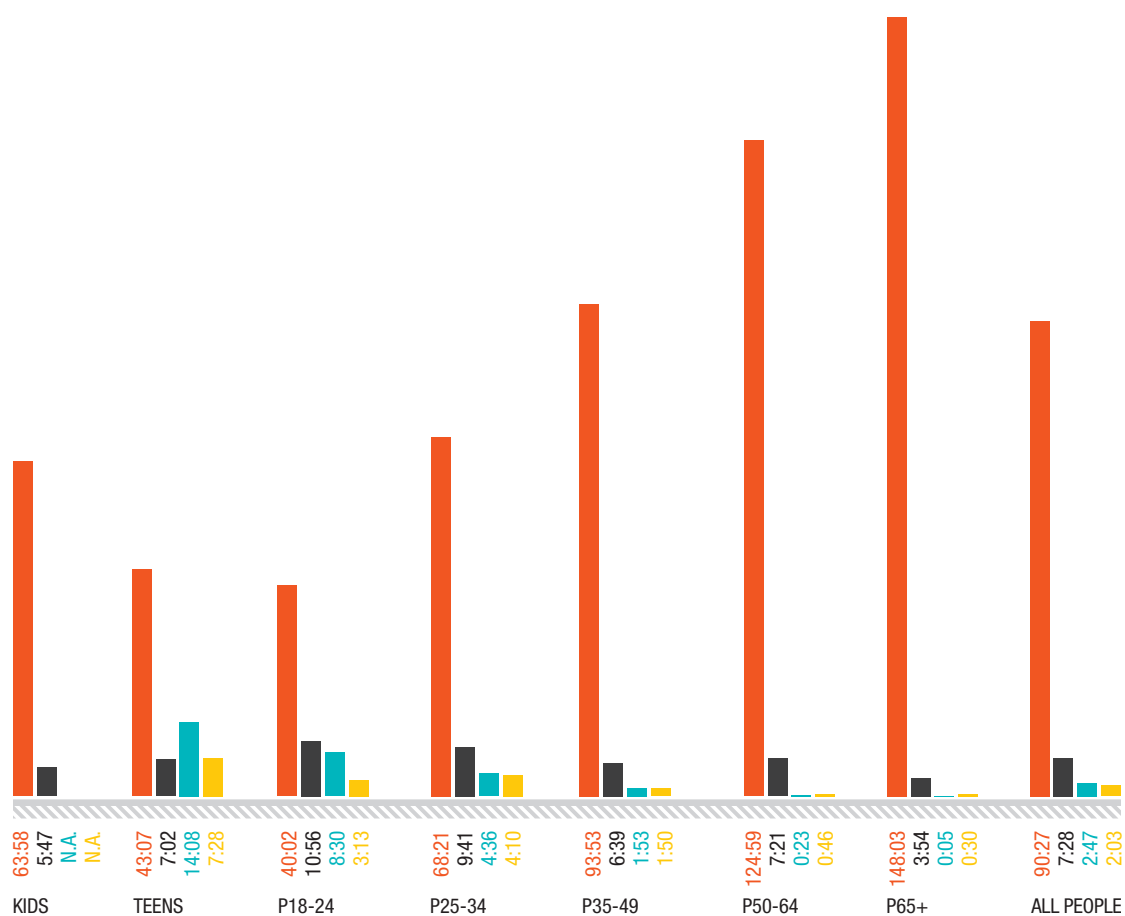
Australians aged 16+ reported spending 2:47 watching any online video on a smartphone in the quarter, compared to 1:56 a year earlier.

As tablets and smartphones become more common, interest in their impact on audience behaviour continues to grow. To provide insight, the Q3 2014 edition of the Multi-Screen Report presented a special study of 1,800 people aged 14+ living in households in which they had access to one or more internet-connected mobile devices. While the main focus was on device sharing among household members, the study also explored how people watch video on mobile screens. Although users increasingly view video on smartphones and tablets, they primarily use these devices for other purposes. As seen in previous editions of the Multi-Screen Report, younger audiences watch more video on connected mobile devices than older age groups do.



## 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+)



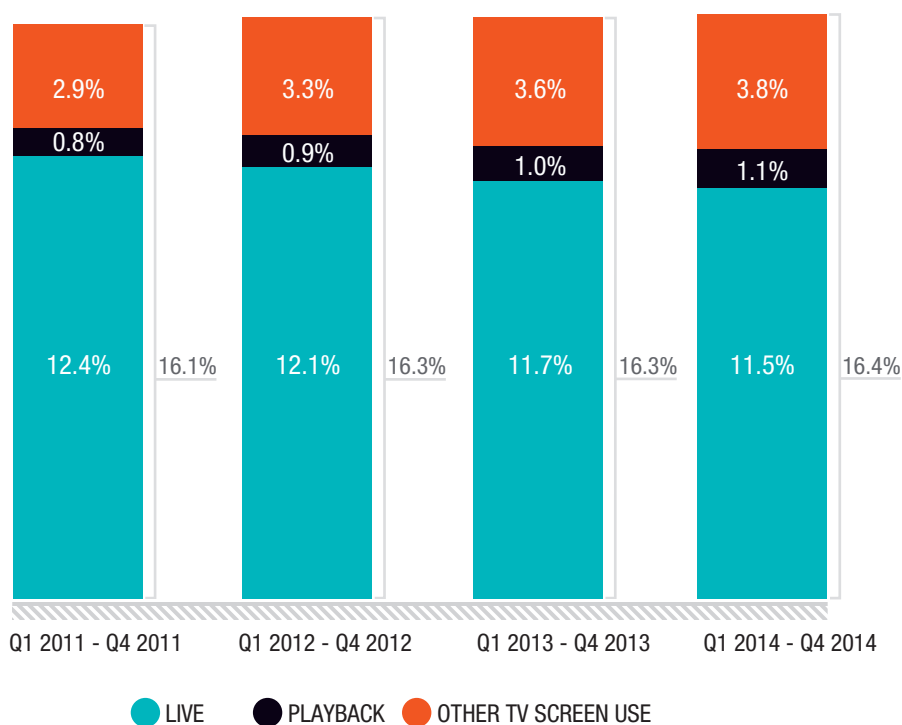
WATCHING ANY  
ONLINE VIDEO  
ON A TABLET (P16+)



# TOTAL USE OF THE TELEVISION SCREEN

Turning to use of the television screen itself, during the past four years Australians have been spending more time with their TV sets overall. This is because 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 attached to it, such as games consoles, PVRs and over-the-top (OTT) internet-delivered services.

## 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 Q1 2014 – Q4 2014 (far right bar, left) an estimated 16.4 per cent of Australians were using their in-home TV screens.

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

In calendar 2014, Australians' total use of the TV set – including live and playback TV viewing, and other screen use – averaged out at 16.4 per cent TARP across the whole day, up modestly on the year before.

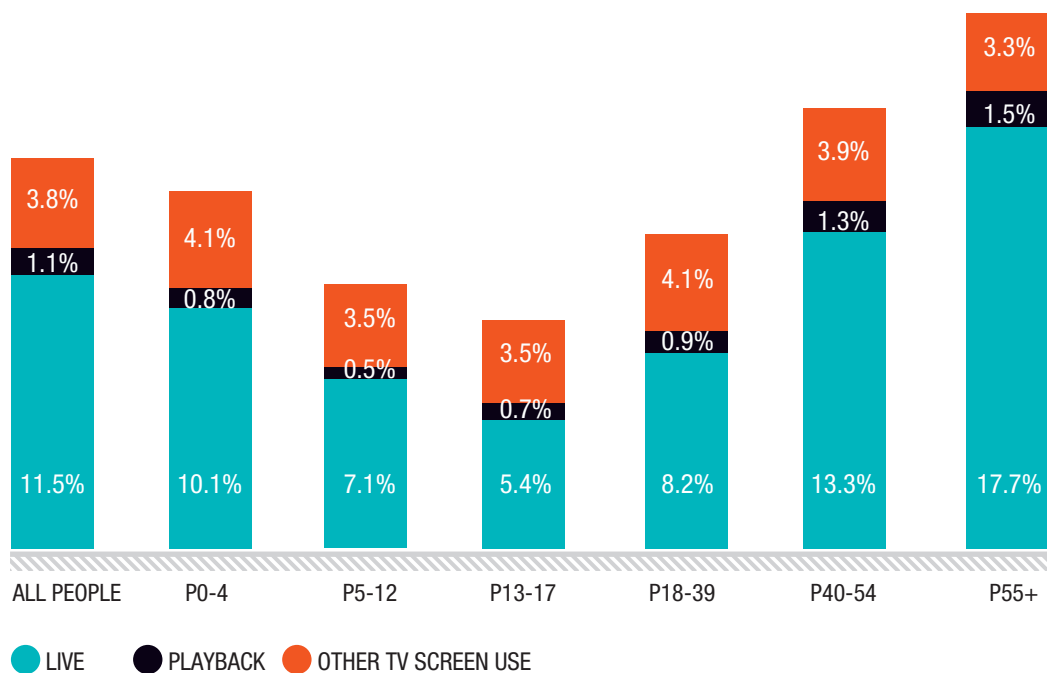
Broadcast TV viewing was stable year-on-year. As a percentage of total broadcast viewing, live viewing declined slightly ('live' is when people watch free-to-air or subscription channels at the time broadcast actually went to air).

Meanwhile playback (when people playback broadcast material they have recorded using a PVR or DVR at normal speed *through their television set* within seven days of original broadcast) rose slightly – continuing the gradual, steady increase in playback viewing

seen in each of the past four years.

Other screen use – that is, when people use their TV screens for purposes other than watching live or playing back broadcast television – has risen incrementally each year, or by 0.9 per cent TARP over the past four years. Examples of such activity include gaming; viewing OTT services; accessing network catch-up TV (streaming) services; internet browsing; watching DVDs; or playing back recorded TV content beyond seven days from original broadcast.

## TARP BY DEMOGRAPHIC Q1 2014 TO Q4 2014



## KEY OBSERVATIONS

**TABLE 1: TECHNOLOGY PENETRATION**

	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014
Completely DTT: Penetration within TV households (Homes capable of receiving DTT on each working TV within the home)	91%	93%	94%	95%	95%
Personal video recorder (PVR): Penetration within TV households	53%	54%	55%	55%	56%
2+PVR: Penetration within TV households	14%	14%	14%	15%	15%
Internet Connection: Household penetration <sup>1</sup>	80%	80%	80%	80%	80%
Tablets: Household penetration	40%	42%	42%	45%	47%
Internet Capable TV in home (Whether connected or not)	23%	27%	27%	29%	30%
Smartphones: People 16+ <sup>2</sup>	68%	69%	71%	74%	73%

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

	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014
Watching TV in the home <sup>3</sup>	92:39	93:16	97:03	96:58	90:27
Watching Playback TV	6:47	7:15	7:58	8:08	7:21
Online time spent per person <sup>4</sup>	37:39	38:41	39:27	37:44	37:08
Watch video on Internet <sup>5</sup>	5:52	7:48	8:08	7:30	7:28
Watching online video on a smartphone <sup>6</sup>	1:56	N.A.	N.A.	N.A.	2:47
Watching online video on a tablet <sup>6</sup>	1:47	N.A.	N.A.	N.A.	2:03

<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**

	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014
Watching TV in the home <sup>7</sup>	21,750	21,859	21,920	21,789	21,813
Watching Playback TV	9,745	10,946	11,210	11,352	11,469
Online unique audience <sup>8</sup>	16,193	16,235	17,394	17,585	17,704
Watch video on Internet <sup>9</sup>	12,080	12,323	13,516	13,377	13,288
Owning/using a smartphone <sup>10</sup>	12,605	13,171	12,005	12,062	12,132
Watching online video on smartphone <sup>11</sup>	2,824	N.A	N.A	N.A	3,470
Watching online video on tablet <sup>11</sup>	2,209	N.A	N.A	N.A	2,479

**TABLE 4: A MONTH IN THE LIFE – Q4 2014**

	KIDS <sup>12</sup>	TEENS <sup>13</sup>	P18-24	P25-34	P35-49	P50-64	P65+	ALL PEOPLE
Watching TV in the home <sup>7</sup>	63:58	43:07	40:02	68:21	93:53	124:59	148:03	90:27
Q4 2013	66:18	47:33	43:24	71:20	98:56	125:19	148:42	92:39
Watching Playback TV	4:34	4:34	4:12	6:08	8:43	9:41	10:10	7:21
Q4 2013	3:42	4:30	4:22	6:03	7:51	9:13	9:04	6:47
Online time spent per person <sup>8</sup>	4:52	12:51	34:14	41:07	39:28	45:47	30:22	37:08
Watch video on Internet <sup>9</sup>	5:47	7:02	10:56	9:41	6:39	7:21	3:54	7:28
Watching online video on a smartphone <sup>14</sup>	N.A.	14:08	8:30	4:36	1:53	0:23	0:05	2:47
Watching online video on tablet <sup>14</sup>	N.A.	7:28	3:13	4:10	1:50	0:46	0:30	2:03

<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> Smartphone ownership and usage sourced from Nielsen Consumer & Media View (people aged 16+).

<sup>11</sup> Nielsen Australian Connected Consumers report - national figures produced annually citing 21% of the online population aged 16+ for mobile 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).

<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 ACC aged 16-17.

<sup>14</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 <sup>12</sup>	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014
Watching TV in the home <sup>7</sup>	66:18	65:06	69:49	69:11	63:58
Watching Playback TV	3:42	4:02	4:27	4:48	4:34
Online time spent per person <sup>8</sup>	8:04	5:36	7:27	4:56	4:52
Watching video on Internet <sup>9</sup>	5:35	7:05	7:20	4:44	5:47
Watching online video on a smartphone <sup>14</sup>	N.A.	N.A.	N.A.	N.A.	N.A.
Watching online video on a tablet <sup>14</sup>	N.A.	N.A.	N.A.	N.A.	N.A.

TEENS <sup>13</sup>	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014
Watching TV in the home <sup>7</sup>	47:33	45:12	46:44	47:20	43:07
Watching Playback TV	4:30	4:13	4:40	4:40	4:34
Online time spent per person <sup>8</sup>	13:01	9:55	11:27	9:58	12:51
Watching video on Internet <sup>9</sup>	6:27	6:40	6:33	5:28	7:02
Watching online video on a smartphone <sup>14</sup>	8:48	N.A.	N.A.	N.A.	14:08
Watching online video on a tablet <sup>14</sup>	2:26	N.A.	N.A.	N.A.	7:28

P18-24	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014
Watching TV in the home <sup>7</sup>	43:24	45:14	45:50	44:23	40:02
Watching Playback TV	4:22	4:42	4:55	4:44	4:12
Online time spent per person <sup>8</sup>	42:29	40:37	40:00	36:23	34:14
Watching video on Internet <sup>9</sup>	12:23	16:28	13:02	9:09	10:56
Watching online video on a smartphone <sup>14</sup>	4:09	N.A.	N.A.	N.A.	8:30
Watching online video on a tablet <sup>14</sup>	3:30	N.A.	N.A.	N.A.	3:13

P25-34	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014
Watching TV in the home <sup>7</sup>	71:20	74:21	77:56	75:45	68:21
Watching Playback TV	6:03	6:56	7:17	7:14	6:08
Online time spent per person <sup>8</sup>	43:12	42:16	44:18	41:09	41:07
Watching video on Internet <sup>9</sup>	7:55	10:05	9:49	7:17	9:41
Watching online video on a smartphone <sup>14</sup>	4:09	N.A.	N.A.	N.A.	4:36
Watching online video on a tablet <sup>14</sup>	2:56	N.A.	N.A.	N.A.	4:10

<b>P35-49</b>	<b>Q4 2013</b>	<b>Q1 2014</b>	<b>Q2 2014</b>	<b>Q3 2014</b>	<b>Q4 2014</b>
Watching TV in the home <sup>7</sup>	98:56	98:06	103:05	102:32	93:53
Watching Playback TV	7:51	8:13	9:06	9:24	8:43
Online time spent per person <sup>8</sup>	40:43	42:48	42:50	42:22	39:28
Watching video on Internet <sup>9</sup>	5:28	7:17	8:15	7:17	6:39
Watching online video on a smartphone <sup>14</sup>	1:21	N.A.	N.A.	N.A.	1:53
Watching online video on a tablet <sup>14</sup>	1:51	N.A.	N.A.	N.A.	1:50

<b>P50-64</b>	<b>Q4 2013</b>	<b>Q1 2014</b>	<b>Q2 2014</b>	<b>Q3 2014</b>	<b>Q4 2014</b>
Watching TV in the home <sup>7</sup>	125:19	124:37	130:21	131:42	124:59
Watching Playback TV	9:13	9:40	10:59	11:05	9:41
Online time spent per person <sup>8</sup>	40:27	43:55	43:57	45:21	45:47
Watching video on Internet <sup>9</sup>	3:23	5:20	7:00	7:05	7:21
Watching online video on a smartphone <sup>14</sup>	0:25	N.A.	N.A.	N.A.	0:23
Watching online video on a tablet <sup>14</sup>	0:51	N.A.	N.A.	N.A.	0:46

<b>P65+</b>	<b>Q4 2013</b>	<b>Q1 2014</b>	<b>Q2 2014</b>	<b>Q3 2014</b>	<b>Q4 2014</b>
Watching TV in the home <sup>7</sup>	148:42	150:36	152:20	154:29	148:03
Watching Playback TV	9:04	9:51	10:42	11:10	10:10
Online time spent per person <sup>8</sup>	26:59	28:48	28:26	45:21	30:22
Watching video on Internet <sup>9</sup>	2:29	2:42	3:13	3:39	3:54
Watching online video on a smartphone <sup>14</sup>	0:08	N.A.	N.A.	N.A.	0:05
Watching online video on a tablet <sup>14</sup>	0:30	N.A.	N.A.	N.A.	0:30

<b>ALL PEOPLE</b>	<b>Q4 2013</b>	<b>Q1 2014</b>	<b>Q2 2014</b>	<b>Q3 2014</b>	<b>Q4 2014</b>
Watching TV in the home <sup>7</sup>	92:39	93:16	97:03	96:58	90:27
Watching Playback TV	6:47	7:15	7:58	8:08	7:21
Online time spent per person <sup>8</sup>	37:39	38:41	39:27	37:44	37:08
Watching video on Internet <sup>9</sup>	5:52	7:48	8:08	7:30	7:28
Watching online video on a smartphone <sup>14</sup>	1:56	N.A.	N.A.	N.A.	2:47
Watching online video on a tablet <sup>14</sup>	1:47	N.A.	N.A.	N.A.	2:03

**TABLE 5: VIDEO AUDIENCE COMPOSITION (BY AGE AND GENDER) – Q4 2014**

	KIDS	TEENS	P18-24	P25-34	P35-49	P50-64	P65+	FEMALES	MALES
On Traditional TV <sup>7</sup>	12%	3%	5%	11%	21%	25%	24%	53%	47%
Q4 2013	12%	3%	5%	11%	22%	25%	22%	53%	47%
On Internet <sup>9</sup>	3%	4%	10%	19%	29%	23%	12%	49%	51%
Q4 2013	2%	4%	10%	20%	29%	23%	13%	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 recorded and viewed (played back) 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 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.
- Smartphone and tablet viewing figures sourced from Nielsen Australian Connected Consumer report 2015 (ACC) based on online national population aged 16+. [Click here for details.](#)
- 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.





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



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