Australian VIDEO VIEWING REPORT

QUARTER 1 2017

Introduction

Welcome to the first issue of the Australian Video Viewing Report, which each quarter will examine the evolving ways in which people watch video, including broadcast television and other content.

Like its predecessor, The Australian Multi-Screen Report, we review device take-up and viewing on different screens, to better understand how audience behaviour is shifting with growing content and platform choices. The familiar figures for time spent watching live and time-shifted TV in the home remain, along with time spent watching video on desktops and laptops, and on tablets and smartphones.

We also retain our focus on when Australians view video and the amount of time they devote to doing so for a more complete perspective on changing viewing patterns. For instance, at home, where most viewing takes place, Australians have numerous device and platform options. This encourages the 'spreading' activity we've been documenting for several years, and is evident in the steady, gradual decline in the amount of time people spend watching live and time-shifted TV on in-home sets – particularly in the evenings, when people generally have the most available time. Meanwhile, now-ubiquitous mobile devices allow people to consume video at different times of day, including when they are outside the home. For some, this creates more time and opportunity to watch.

Despite unprecedented choice, on average across the total population, TV remains the most-watched screen, and most Australians watch some broadcast TV (free-to-air and subscription channels) each week. Across the population Australians spend on average 2 hours and 39 minutes watching live and playback TV on TV sets each day: that's just 33 fewer minutes than they did six years ago, in Q1 2011.

While we'll continue to incorporate new and better data as it becomes available – recent examples include the addition of 8-28 day time shift viewing, and OzTAM Video Player Measurement (VPM) data – we've streamlined and simplified how we present the information.

In each issue we'll focus on a specific topic, to offer insight on a particular aspect of viewing behaviour based on Regional TAM, OzTAM and Nielsen data. For Q1 2017, our spotlight is on the new Total Grocery Shoppers demographic, introduced at the start of the 2017 ratings year to reflect changing Australian household characteristics and better capture all grocery buyers in a home. The extent to which younger men contribute to household shopping may surprise you.

We hope you enjoy the Australian Video Viewing Report and find it informative. We'd welcome your feedback. Our contact details are on the back page, feel free to get in touch.

Regards

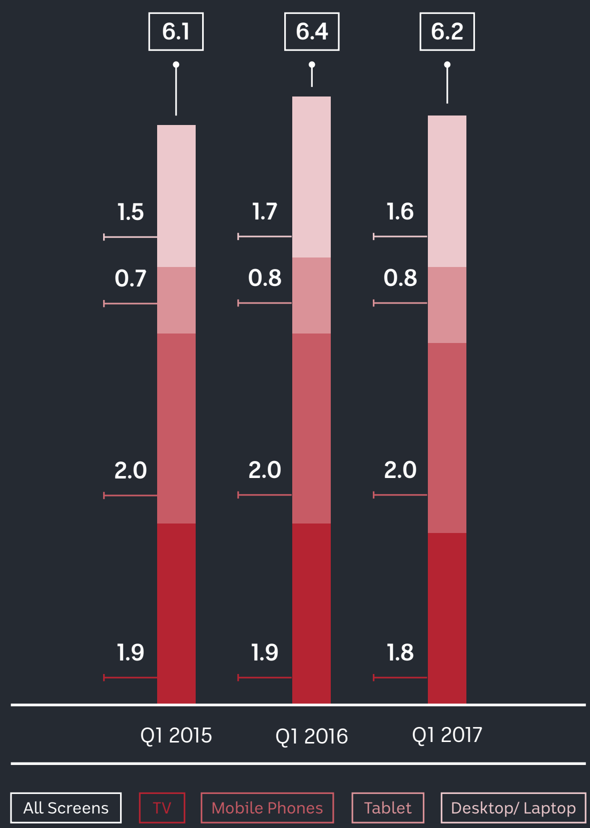
Tony Hogarth	*Doug Peiffer*	*Craig Johnson*
REGIONAL TAM CHAIR	OZTAM CEO	NIELSEN REGIONAL MD, MEDIA

Screens in Australian homes

The majority of screens in a typical Australian household are now internet capable. Portable connected devices create particular flexibility to watch video because they can travel with the consumer anywhere inside or outside the home.

While the total number of screens in homes has risen over the past two years, growth rates are slowing. Penetration levels for various technologies are also plateauing (please see Table 1 at the end of the report) and this reflects consumer tendencies to retain an older model device for secondary use when upgrading to a new one.

Australian homes had an average of 6.2 screens each in Q1 2017, down from 6.4 a year earlier but slightly higher than the average 6.1 screens recorded in Q1 2015. The number of mobile phones has been steady at 2 per household over the past three years, while the average number of TVs has fallen slightly. Desktop/laptop and tablet ownership is slightly higher than in Q1 2015 but lower than in Q1 2016.



Source: Estimates for the average number of TVs and mobile phones in homes are based on OzTAM Metro and Regional TAM Establishment Surveys. Tablet and desktop/laptop estimates are based on OzTAM Metro and Regional TAM long Establishment Surveys using hybrid estimates of incidence per home covered by full Household Information/ Household Update surveys.

Viewing patterns across devices and the day

VIEWING ON TV SETS

Broadcast TV viewing levels on in-home TV sets remain high. Each week in Q1 2017 nearly 20 million Australians watched at least some free-to-air and/or subscription TV, equating to 83.7 per cent of the population in people metered markets.

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

In prime time, when people generally have the most available time and screen options to view both TV and other video content, weekly broadcast reach on in-home TV sets is 79.4 per cent (18.9 million Australians in people metered markets).

Nearly 20 million Australians watch broadcast TV each week

BROADCAST TV VIEWING ON IN-HOME TV SETS EACH WEEK

	0200 - 2600			1800 - 2400		
	Q1 2016	Q1 2017	Q1 2017	Q1 2016	Q1 2017	Q1 2017
	% Reach	% Reach	Weekly Average Cumulative Reach	% Reach	% Reach	Weekly Average Cumulative Reach
All People	86.0	83.7	19.9m	82.2	79.4	18.9m
Kids	86.1	83.1	3.2m	76.8	72.7	2.8m
Teens	74.1	71.6	1.02m	66.8	64.6	0.9m
P18-24	69.3	65.6	1.8m	62.9	58.2	1.3m
P25-39	81.9	78.1	4m	78.4	74.0	3.8m
P40-54	91.0	89.9	4.2m	89.4	87.7	4.1m
P55-64	93.2	92.7	2.5m	92.2	91.4	2.5m
P65+	95.1	94.0	3.5m	94.6	93.4	3.4m

Average 1-minute weekly cumulative reach across the population in OzTAM and Regional TAM coverage areas.
Includes live viewing and playback through the TV set at the time it is watched within 28 days.
Time bands use the industry standard 26-hour TV clock: 0200-2600 = 2am-2am; 1800-2400 = 6pm-midnight | All People

TOTAL USE OF THE TV SET

As television sets become increasingly 'smart' and multi-functional, Australians are devoting a greater percentage of the time they use them for purposes other than watching live or playing back broadcast TV. This contributes to the 'spreading' behaviour noted in the introduction and documented over several years. The changing way Australians use their TV sets is particularly apparent in prime time, when people generally have the most available time to view.

Each month in Q1 2017, Australians in people metered markets watched an average 8 hours and 37 minutes (8:37) of **playback TV** through their TV sets within 28 days of the live broadcast. In prime time such viewing was 4:38.

On an all-day (24-hour) basis, **other TV screen use** rose by 54 minutes a month year-on-year, from 30:38 per person in Q1 2016 to 31:32 in Q1 2017. On the same basis, other TV screen use in prime time rose by 29 minutes. Across the day Australians spend 28 per cent of their time with the TV set doing something other than watching live or playing back broadcast TV within 28 days. In prime time the proportion is 25 per cent.

Other TV screen use and 8-28 day time-shifted viewing now account for 14:48 per month per Australian in prime time and 33:05 per month across the day. The growth in such activity contributes to the progressive decline in live and playback to 7 TV viewing over the past few years.

Year-on-year total TV screen use was down by 6:27 on average per month across the day, and by 3:29 in prime time, largely due to the decline in live TV viewing.

In prime time, Australians spend 25 per cent of their time with the TV set doing something other than watching live or playback TV within 28 days

Even with platform and content choice, Australians watch 2 hours and 39 minutes of live and playback TV on in-home TV sets each day: just 33 minutes less than they did in Q1 2011.

TOTAL USE OF THE TV SET

	0200 - 2600		1800 - 2400	
	Q1 2016 HH:MM	Q1 2017 HH:MM	Q1 2016 HH:MM	Q1 2017 HH:MM
Total TV Screen Use	117:30	111:03	58:54	55:25
Total Broadcast TV:	85:20	79:30	44:33	41:22
Watching Live TV	77:44	70:52	40:25	36:44
Watching Playback to 7 TV	7:36	7:04	4:08	3:53
Watching Time Shift 8-28 TV	1:31	1:33	0:44	0:45
Other TV Screen Use	30:38	31:32	13:34	14:03

Time bands use the industry standard 26-hour TV clock: 0200-2600 = 2am-2am; 1800-2400 = 6pm-midnight | All People

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

BROADCAST TV VIEWING ON CONNECTED DEVICES

To further explore TV viewing patterns across the day, this section illustrates the times at which Australians watch **broadcast content on connected devices**, drawing on OzTAM Video Player Measurement (VPM) data. While VPM viewing accounts for around 1 - 2 per cent of all broadcast TV viewed each week, catch up and live-streamed VPM content can represent a sizeable part of the audience for some programs – similar to the way time-shifted viewing can contribute significantly to a broadcast program's total viewership.

OzTAM VPM data captures minute-by-minute viewing of participating broadcasters' free online 'catch up TV' (video on demand) and live-streamed content played to connected devices such as tablets, smartphones, smart TVs, games consoles and desktops/laptops. As of Q1 2017 those broadcasters are the ABC, Seven Network, Nine Network, Network Ten, SBS and Foxtel.

The following charts compare viewing patterns for online-delivered TV content on connected devices (computers, tablets, smartphones and connected TV screens). These patterns of use may be familiar in your own life.

As with broadcast TV watched on TV sets, most viewing on connected devices takes place when people have the time to do so. Portability also influences viewing behaviour: mobile devices provide flexibility to catch up or live stream television content – whether at home, work, school or while commuting. As noted earlier in the report, for some people this creates more time to watch. While TV sets and desktop computers sit in a fixed location, laptops can move from work or school to home, and from room to room. Tablets and smartphones, being even smaller, not only move with the user through the day but often finish it on the bedside table.

Evenings remain a peak viewing time across all device types, but there are other points in the day when individual device use is more prominent. That includes commuting times, lunchtime, weekend daytime, and weekday afternoons once school lets out.

Across weekdays and weekends some online TV viewing patterns emerge:

- All connected devices have an evening viewing peak.
- There is more online viewing during the daytime at weekends compared to weekdays.
- On weekdays catch up (video on demand) viewing on tablets picks up in the afternoon, coinciding with the end of the school day.
- There is also a slight bump for catch up viewing on weekdays around lunchtime.
- Catch up activity peaks later in the evenings than live streaming.
- While live viewing on desktops and laptops builds through the day (as it does for other connected devices), live streaming on tablets and smartphones progressively builds to a peak later in the evening.
- There is a clear weekday morning peak on smartphones and tablets for both live and catch up viewing.
- On weekend mornings catch up on smartphones and tablets is more pronounced from early until mid-morning.

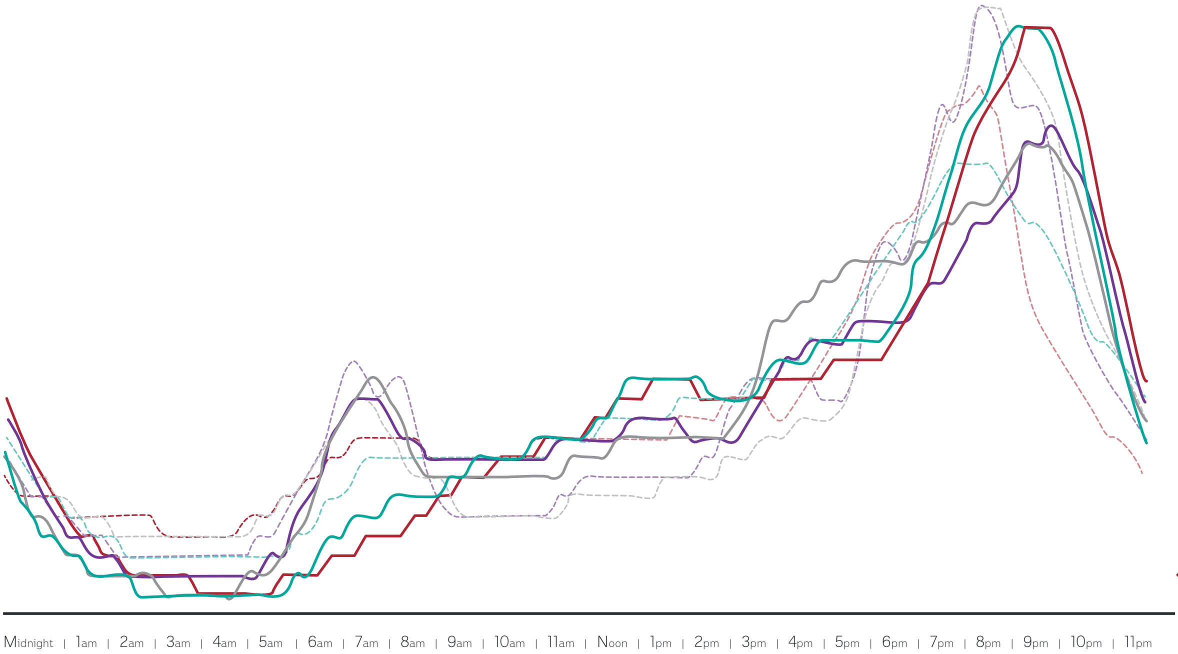
Interpreting ‘shape of day’ graphs

The weekday and weekend graphs compare patterns of viewing across weekdays and weekends (not volume) throughout March 2017 and have been rescaled to show peaks and troughs for different devices. They illustrate the percentage each quarter-hour represents of the total day’s activity for that particular device/activity.

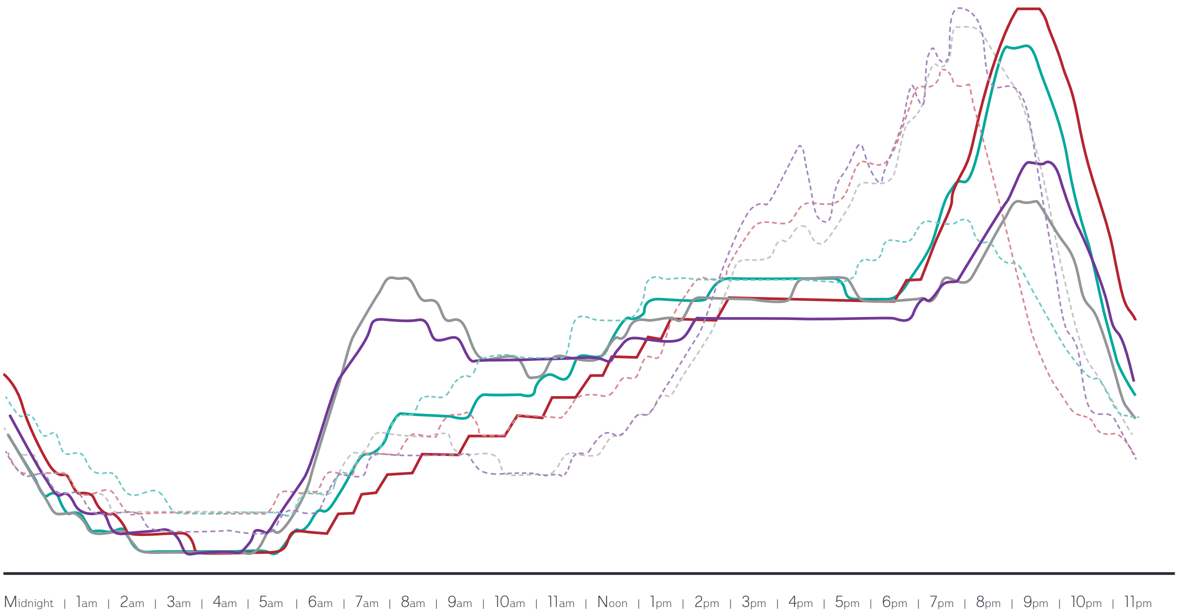
The pie charts on page 10 detail the volume of VPM viewing on various device types.

SHAPE OF DAY: VPM VIEWING PATTERNS ON CONNECTED DEVICES | MARCH 2017

WEEKDAYS



WEEKENDS



Desktop/ Laptop Live | Smartphone Live | Tablet Live | Connected TV LIve

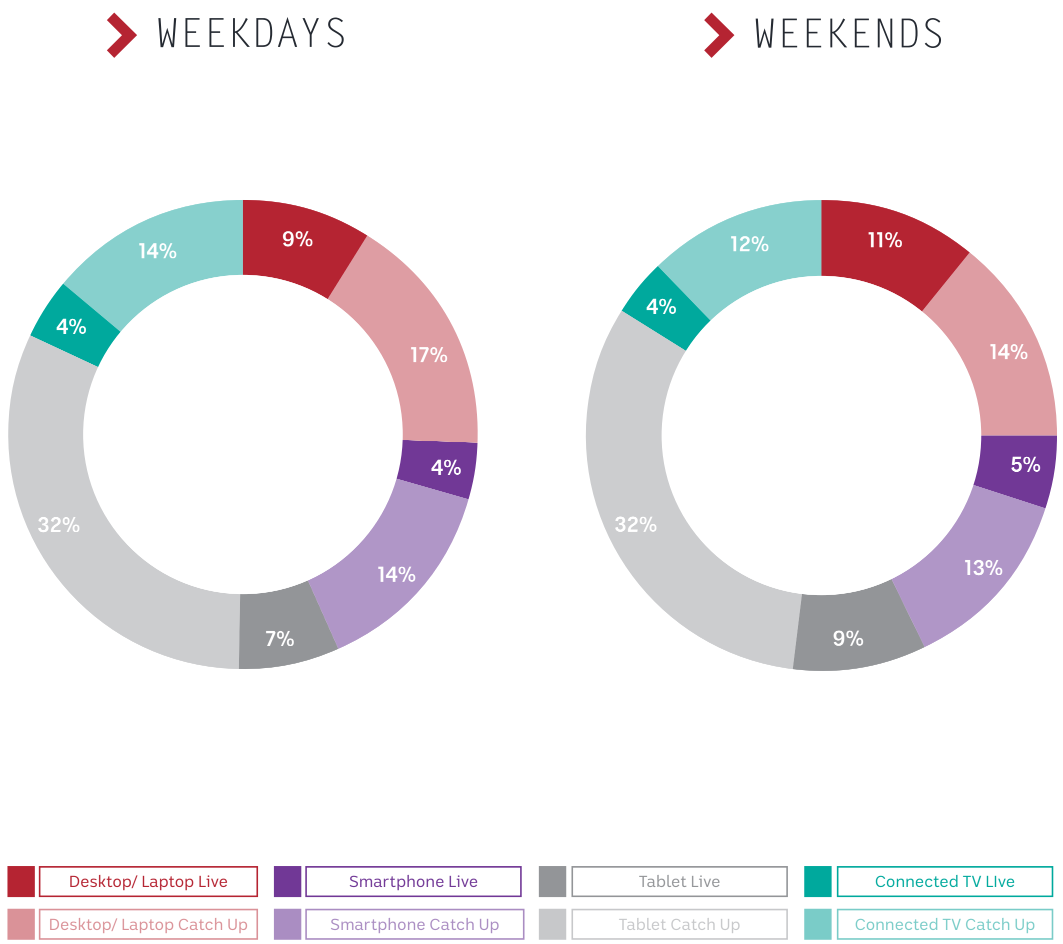
Desktop/ Laptop Catch Up | Smartphone Catch Up | Tablet Catch Up | Connected TV Catch Up

'Connected TV' relates to watching internet-delivered television content on a connected TV, not broadcast TV channels watched live or played back on the TV set.

Overall, on weekdays the majority of VPM viewing occurs on tablets (39 per cent of total minutes played), followed by desktops/laptops (26 per cent), then connected TVs and smartphones (accounting for 18 per cent each).

On weekends, 41 per cent of viewing is on tablets, 25 per cent on desktops, 18 per cent on smartphones and 16 per cent on connected TVs.

VOLUME OF VPM VIEWING | MARCH 2017



Overall, VPM viewing accounts for approximately 1-2 per cent of all broadcast TV content viewed each week

NEXT WE LOOK AT VIDEO VIEWING ON DESKTOPS AND LAPTOPS.

VIDEO VIEWING ON DESKTOPS AND LAPTOPS

Australians aged 2+ who watched **video on a desktop or laptop computer** (looking only at actual viewers) spent on average 13 hours and 4 minutes (13:04) each month in Q1 2017 doing so. Those aged 18-24 are the heaviest online video viewers, watching on average 22:04 per month on desktops/laptops, while people 65+ spend the least (6 hours).

Watching video on a desktop/laptop includes broadcast and non-broadcast video, including: YouTube, Facebook and Vimeo; internet-delivered subscription video services; and TV broadcasters' free catch up and live-streamed services.

VIEWING ON SMARTPHONES AND TABLETS

Each month, online Australians aged 18 and over say they spend 2 hours and 46 minutes (2:46) watching any kind of video on **smartphones** and 2:34 on **tablets**. Among major age groups, 18-24s claim to watch the most on smartphones (9:01 per month), while 25-34s watch the most on tablets (4:23). Figures are self-reported, Q4 2016.

Where is SVOD?
Viewing of subscription video on demand (SVOD) services is captured in other TV screen use, watching video on PC/laptop and watching video on smartphones and tablets.

Spotlight: Total Shoppers

Who does the supermarket shopping in your household?

If your answer was "several of us" you're not alone: the traditional weekly shop by a main grocery buyer is increasingly less typical. People now shop multiple times during the week, with those duties often shared between parents and other family members.

To reflect these changing behaviours and Australian household characteristics, OzTAM and Regional TAM introduced a new 'Total Grocery Shoppers' demographic at the start of the 2017 ratings year. It joins the longstanding 'Main Grocery Buyer' demographic, and together these variables provide a more comprehensive picture of who shops and influences grocery purchasing decisions in Australian homes.

Main Grocery Buyer (MGB) =
Person aged 18 or older who has primary household shopping responsibilities.

Alternate Shopper(s) (AS) =
Other household member(s) aged 13 and older who contribute to grocery shopping.

Total Grocery Shoppers (TGS) =
Main Grocery Buyer + Alternative Shoppers

Main Grocery Buyer cannot also be an Alternate Shopper

WHY ARE AUSTRALIAN GROCERY BUYING PATTERNS CHANGING?

- People delay marriage and having children.
- More households where both parents work and share responsibility for grocery shopping.
- Young adult children leave home at a later stage, and so help with household shopping.
- More shared households, where individuals do their own shopping.
- Busy schedules mean meals are often not planned in advance.
- Increasing interest in healthy, imaginative cooking, and emphasis on fresh produce.
- The quest for 'discovery' and finding something new in-store.
- Increasing trial of online shopping, so more household members research products and influence purchase decisions.

BY BROADENING THE DEFINITION OF HOUSEHOLD SHOPPERS, SOME INTERESTING PATTERNS EMERGE.

▪ ALTERNATE SHOPPERS SKEW YOUNG AND MALE.

Compared to Main Grocery Buyers (MGB), Alternate Shoppers (AS) are more likely to be male and significantly younger:

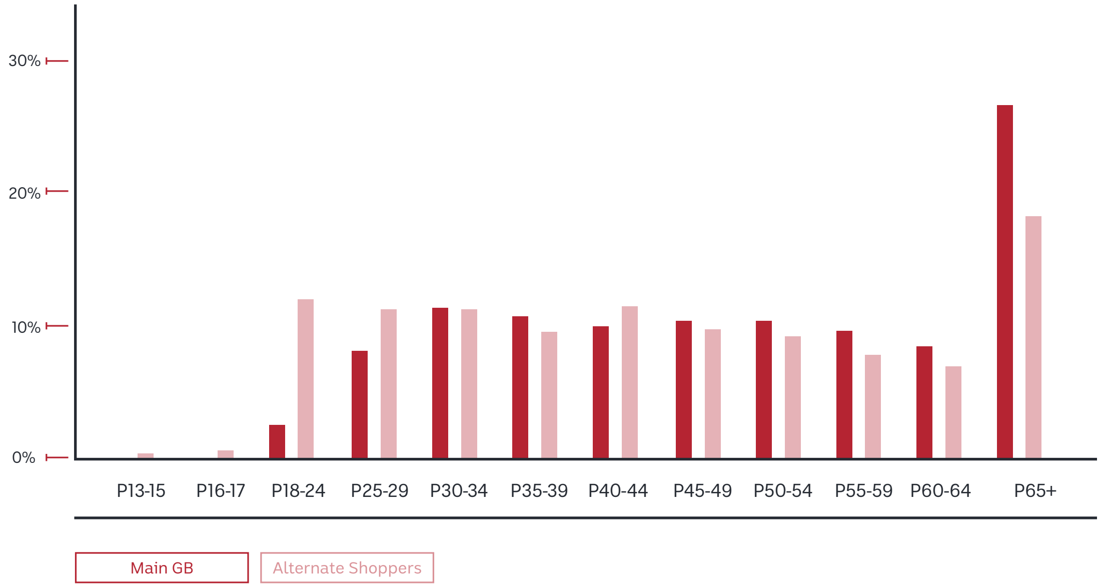
- 69 per cent of MGB are female.
- 70 per cent of AS are male.
- 40.7 per cent of AS are aged 18-39 (compared to 30.1 per cent of MGB).

PROFILE OF AUSTRALIAN GROCERY SHOPPERS

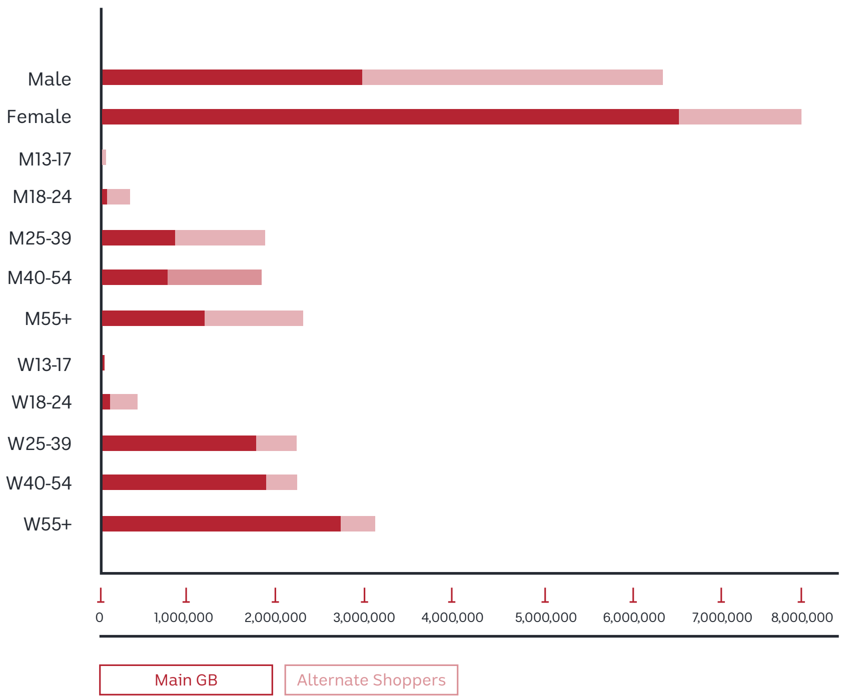
	All People	Total Grocery Shoppers	Main Grocery Buyer (18+)	Alternate Shopper (13+)
Male	49.7%	44.2%	31%	70%
Female	50.3%	55.8%	69%	30%
P0-17	22.3%	0.3%	n/a	0.8%
P18-39	30.9%	33.7%	30.1%	40.7%
P40-54	19.9%	28.3%	28.4%	28.1%
P55+	26.9%	37.7%	41.5%	30.5%

SHOPPER AGE DISTRIBUTION

There are more male AS than male MGB, and far fewer female AS. The AS profile is clustered around men aged 25+.



THE SHOPPER UNIVERSE

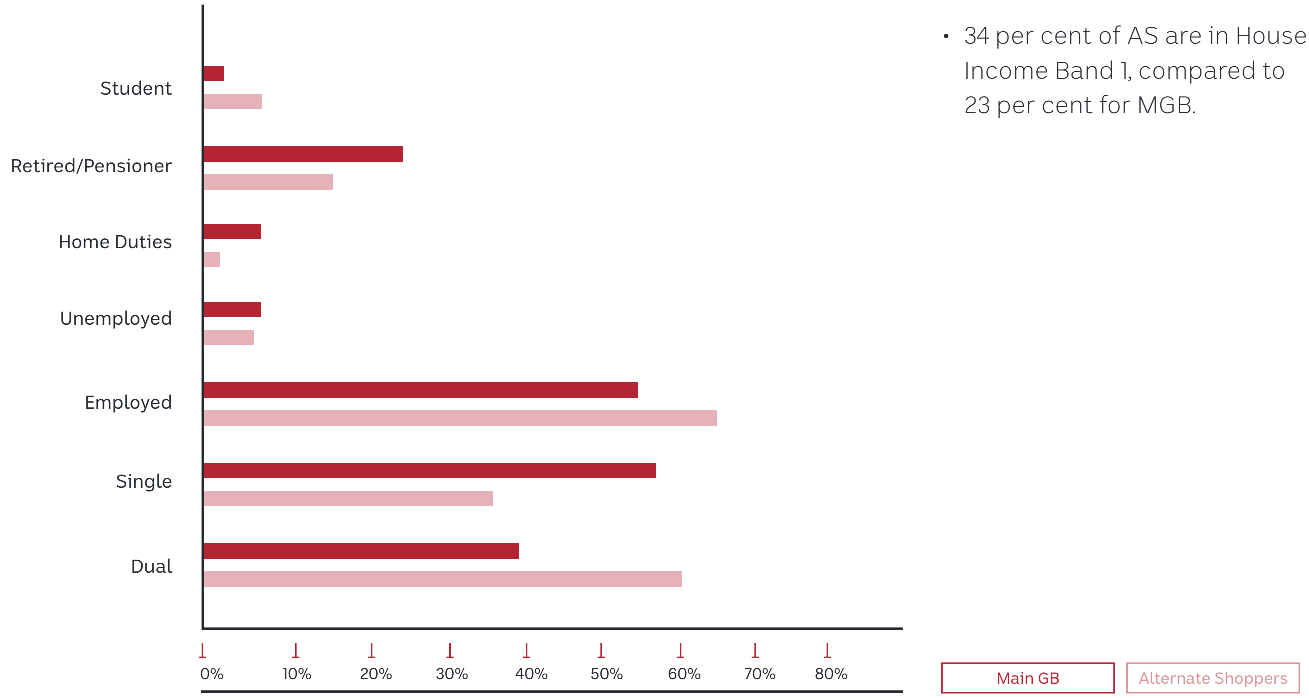


▪ ALTERNATE SHOPPERS ARE MORE LIKELY TO BE WORKING AND RELATIVELY AFFLUENT.

Compared to MGB, AS are more likely to be employed and live in higher income households:

- 67 per cent of AS are employed, compared to 57 per cent of MGB.
- 62 per cent of AS live in dual income households, while 59 per cent of MGB have single incomes.
- 8 per cent of AS, and just 3 per cent of MGB, are students.

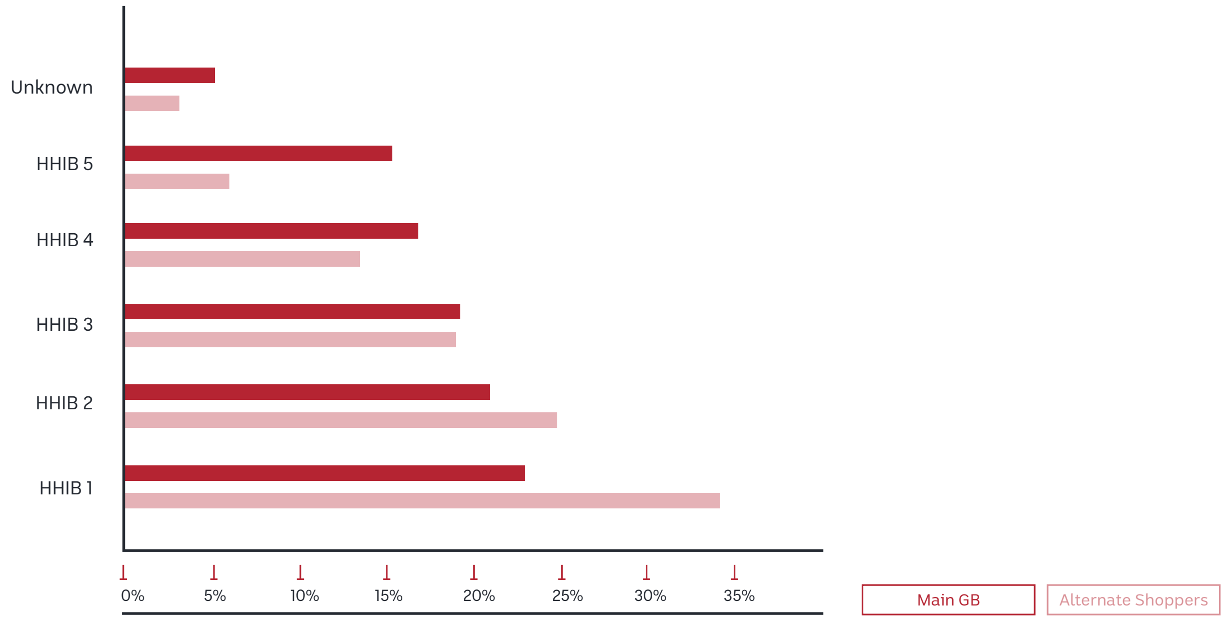
SHOPPER WORK STATUS



With a significantly higher proportion of workers, it's not surprising the AS profile skews to higher income bands:

- 34 per cent of AS are in Household Income Band 1, compared to 23 per cent for MGB.

SHOPPER HOUSEHOLD INCOME BAND



▪ WHILE ALTERNATE SHOPPERS EXPAND, AND THEREFORE ADD AUDIENCE TO, THE TOTAL SHOPPER PROFILE, THEY ARE RELATIVELY LIGHT TV VIEWERS COMPARED WITH MAIN GROCERY BUYERS.

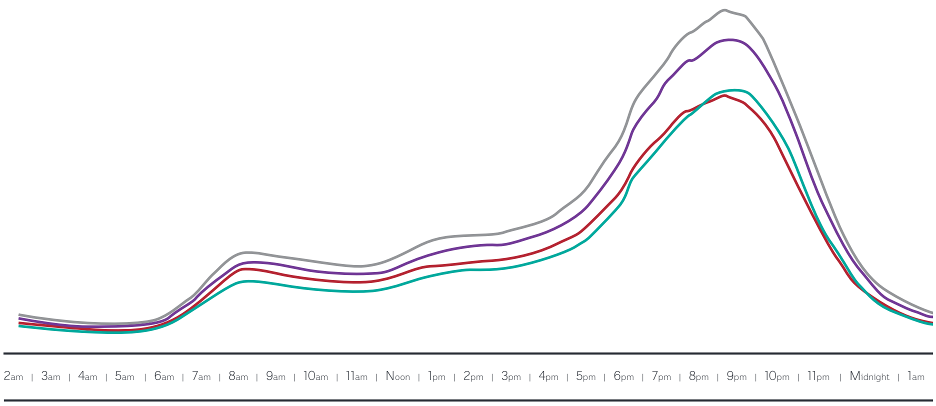
- MGB watch more TV than the general population: 31.5 per cent TARP vs 23.0 per cent TARP.
- At 23.6 per cent TARP, AS viewing levels are lower than their MGB counterparts, reflecting the young male AS skew.
- Reach and average time spent viewing are also relatively lower for AS than MGB and more in line with the general population.

TOTAL TV VIEWING: 1800-2400

	All People	Total Grocery Shoppers	Main Grocery Buyer (18+)	Alternate Shopper (13+)
Audience	5,465,000	4,060,000	2,931,000	1,129,000
TARP	23%	28.8%	31.5%	23.6%
Average Daily Reach % [1 min]	52.7%	61.3%	65.3%	53.7%
Average Time Spent Viewing/Day (per viewer)	2:37	2:49	2:53	2:38
Average Age of Viewer	51	56	57	53
Median Age of Viewer	54	56	57	54
% of Overall Audience Watching TV	100%	76.1%	55%	21.2%

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 between 6pm and midnight in Q1 2017, an estimated 23 per cent of Australians were watching broadcast TV.

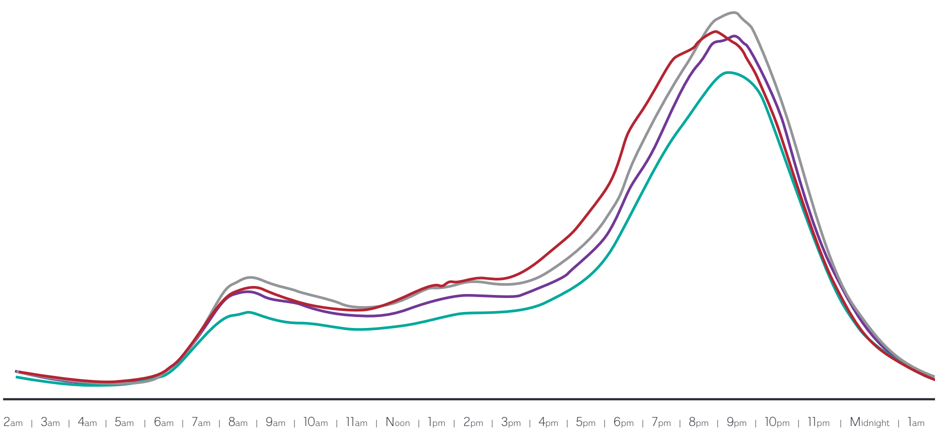
SHAPE OF DAY: DAILY TV VIEWING PATTERNS



▪ ALTERNATE SHOPPERS' VIEWING PATTERNS ARE SIMILAR TO MAIN GROCERY BUYERS'.

- The 'shape of the day' of TV viewing patterns for MGB, AS, and the overall population are similar, though MGB viewing levels are higher.
- AS viewing levels are slightly lower than those of the general population in the daytime, and a little higher after 8pm.

DAILY VIEWING PATTERNS ('SHAPE OF DAY'): CO-VIEWING WITH CHILDREN



INTRODUCING CHILDREN TO THE ANALYSIS:

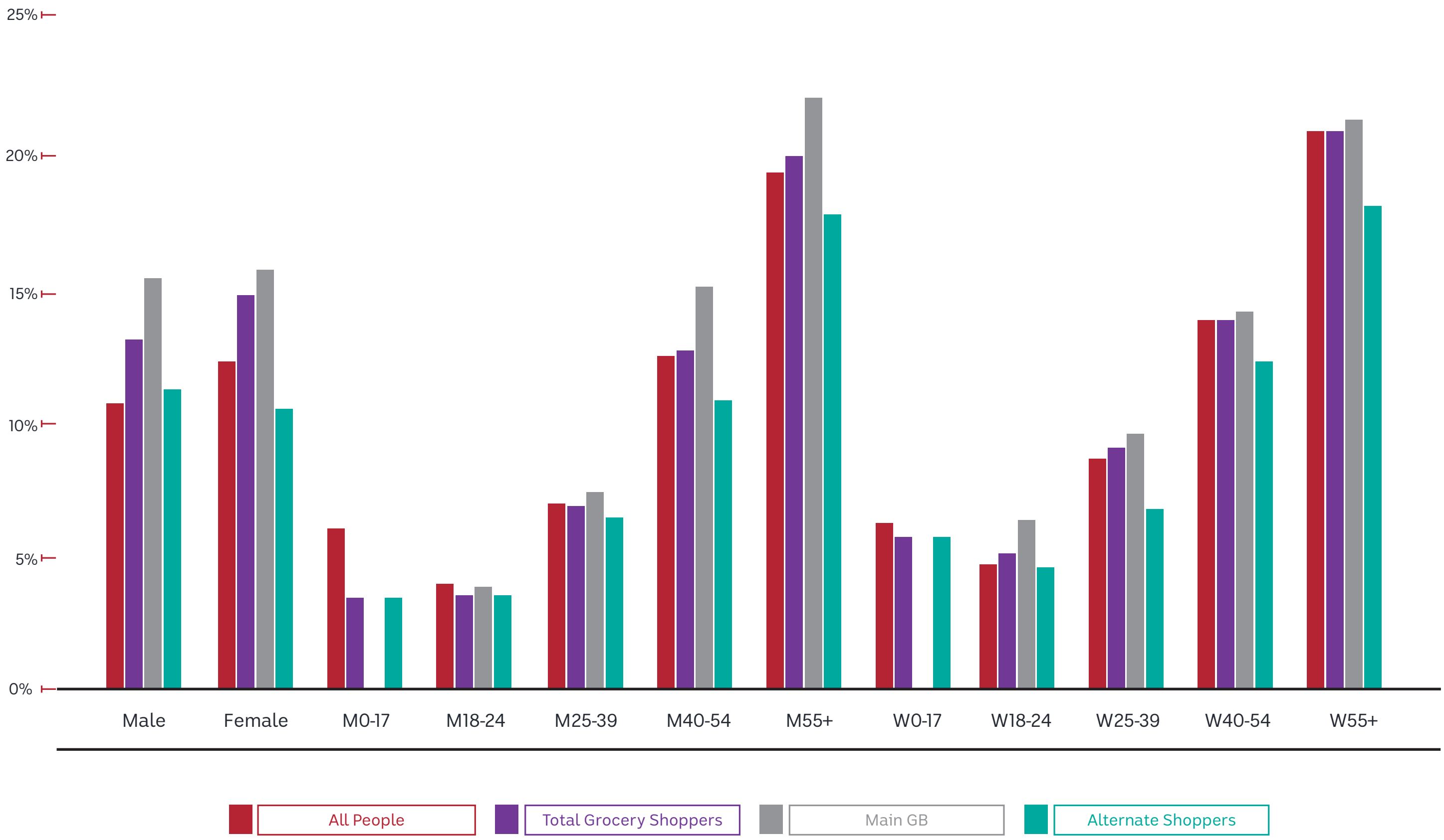
- MGB co-viewing with a child levels overtake the general population just after 7:30pm.
- Total Grocery Shoppers (TGS) + child viewing levels overtake the general population at around 8:30pm.
- AS + child have the lowest viewing levels, given the AS male skew.

All People | Total Grocery Shoppers | Main GB | Alternate Shoppers

Consistent with the pattern across the population, older MGB and AS shoppers watch more TV than their younger counterparts do.

Male and female AS tend to watch about the same amount of TV: 10.8 per cent TARP and 10.1 per cent TARP across the day, respectively.

TOTAL TV VIEWING: TARPS (0200-2600)



Note: The above TARP chart shows the typical audience at any one minute throughout the day (2am-2am), expressed as a percentage of the total potential audience, for all people watching TV as well as the Shopper demographics, broken down by gender and major age groups. For example, at any point in the day in Q1 2017, an estimated 10.8 per cent of male AS were watching TV.

AS and TGS TARPs for the youngest audience bands are 13-17, as these demographics include people aged 13 and older. MGB are aged 18 and over.

Data source: Includes live viewing and playback through the TV set at the time it is watched within 28 days. Combined OzTAM Metro and Regional TAM databases with overlap homes de-duplicated. Universe estimates: Total TV, 1 January – 31 March, 2017. Alternate Shopper defined as Main Grocery Buyer 'no' and Shopper 'yes'.

Key observations

1

Technology Penetration	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017
TV households that receive digital terrestrial television (DTT) on every working TV set[1]	97%	97%	97%	97%	97%
TV households that receive high definition (HD) DTT on every working TV set	95%	96%	96%	96%	96%
Personal video recorder (PVR): Penetration within TV households[1]	58%	59%	60%	59%	59%
2+ PVR: Penetration within TV households	17%	17%	17%	18%	17%
Internet connection: Household penetration[2]	81%	81%	80%	80%	79%
Internet capable ('smart') TV in the home[2]	35%	36%	37%	37%	38%
Connected TVs within smart TV homes	64%	64%	66%	66%	69%
Estimated presence of connected smart TVs across all homes	22%	23%	24%	24%	26%
1+ Smartphone: Household penetration[2]	81%	81%	81%	81%	81%
Tablets: Household penetration[2]	49%	49%	49%	50%	49%

2

Monthly Time Spent (hh:mm)	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017
Watching broadcast TV in the home within 28 days (per person)[3]	86:51	90:02	90:16	81:18	79:30
Watching Live TV	77:44	80:22	81:21	72:51	70:52
Watching Playback to 7 TV	7:36	8:03	7:22	6:51	7:04
Watching Time Shift 8-28 TV	1:31	1:36	1:33	1:35	1:33
Watching video on desktop/laptop (per viewer)[5]	N.A	12:48	12:46	12:07	13:04

Watching broadcast TV is an average per person, whether or not they watch TV (or how much), in OzTAM and Regional TAM coverage areas.

Watching video on desktop/laptop is an average per viewer among online Australians aged 2 and above. It excludes people who don't watch any online video on computers.

3

Overall Use (000s), Monthly Reach	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017
Watching broadcast TV in the home within 28 days (per person) [3]	22,367	22,396	22,341	22,244	22,338
Watching Live TV	22,215	22,264	22,204	22,057	22,118
Watching Playback to 7 TV	12,629	12,556	12,642	12,652	12,620
Watching Time Shift 8-28 TV	9,208	9,079	9,169	9,615	9,498
Watching video on desktop/laptop (per viewer) [4]	N.A.	13,970	13,850	13,742	13,894

4

A Month In The Life - Q1 2017	Kids[5]	Teens[6]	P18-24	P25-34	P35-49	P50-64	P65+	All People
Watching broadcast TV in the home within 28 days (per person) [3]	48:08	27:26	29:39	46:01	78:36	118:32	151:11	79:30
Watching Live TV	42:36	24:26	25:56	40:34	68:52	106:23	136:31	70:52
Watching Playback to 7 TV	3:52	2:21	3:01	4:16	8:06	10:11	12:29	7:04
Watching Time Shift 8-28 TV	1:39	0:39	0:41	1:09	1:36	1:57	2:10	1:33
Watching video on desktop/laptop (per viewer) [4]	11:53	8:39	22:04	20:04	12:07	10:30	6:00	13:04

4A

A Month In The Life By Quarter I **KIDS**[5]	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017
Watching broadcast TV in the home within 28 days (per person) [3]	57:14	60:18	60:46	52:41	48:08
Watching Live TV	51:15	54:12	54:42	47:13	42:36
Watching Playback to 7 TV	4:28	4:36	4:29	3:55	3:52
Watching Time Shift 8-28 TV	1:30	1:29	1:33	1:31	1:39
Watching video on desktop/laptop (per viewer) [4]	N.A.	14:41	14:22	9:30	11:53

4A

A Month In The Life By Quarter | **TEENS**[6]	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017
Watching broadcast TV in the home within 28 days (per person)[3]	32:00	34:31	35:37	30:59	27:26
Watching Live TV	28:28	30:36	31:49	27:27	24:26
Watching Playback to 7 TV	2:54	3:12	3:04	2:47	2:21
Watching Time Shift 8-28 TV	0:38	0:43	0:43	0:44	0:39
Watching video on desktop/laptop (per viewer)[4]	N.A.	4:46	6:35	9:15	8:39

4A

A Month In The Life By Quarter | **P18-24**	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017
Watching broadcast TV in the home within 28 days (per person)[3]	38:12	38:50	37:02	30:36	29:39
Watching Live TV	33:41	33:40	32:52	27:03	25:56
Watching Playback to 7 TV	3:47	4:12	3:26	2:54	3:01
Watching Time Shift 8-28 TV	0:43	0:57	0:44	0:38	0:41
Watching video on desktop/laptop (per viewer)[4]	N.A.	21:52	20:02	16:48	22:04

4A

A Month In The Life By Quarter | **P25-34**	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017
Watching broadcast TV in the home within 28 days (per person)[3]	57:40	58:29	57:29	48:46	46:01
Watching Live TV	50:38	51:08	50:59	42:57	40:34
Watching Playback to 7 TV	5:47	6:00	5:12	4:31	4:16
Watching Time Shift 8-28 TV	1:14	1:20	1:16	1:17	1:09
Watching video on desktop/laptop (per viewer)[4]	N.A.	18:41	19:15	19:19	20:04

4A

A Month In The Life By Quarter | **P35-49**	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017
Watching broadcast TV in the home within 28 days (per person) [3]	85:59	91:24	91:01	80:04	78:36
Watching Live TV	75:34	80:13	80:54	70:33	68:52
Watching Playback to 7 TV	8:46	9:22	8:24	7:43	8:06
Watching Time Shift 8-28 TV	1:38	1:48	1:43	1:47	1:36
Watching video on desktop/laptop (per viewer) [4]	N.A.	11:35	11:24	10:54	12:07

4A

A Month In The Life By Quarter | **P50-64**	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017
Watching broadcast TV in the home within 28 days (per person) [3]	124:38	130:28	131:53	120:50	118:32
Watching Live TV	112:16	117:35	119:48	109:12	106:23
Watching Playback to 7 TV	10:31	10:57	10:08	9:34	10:11
Watching Time Shift 8-28 TV	1:50	1:55	1:56	2:02	1:57
Watching video on desktop/laptop (per viewer) [4]	N.A.	10:34	10:32	11:07	10:30

4A

A Month In The Life By Quarter | **P65+**	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017
Watching broadcast TV in the home within 28 days (per person) [3]	156:04	157:07	158:43	150:21	151:11
Watching Live TV	141:58	142:13	144:40	136:14	136:31
Watching Playback to 7 TV	11:59	12:49	12:04	12:00	12:29
Watching Time Shift 8-28 TV	2:06	2:04	1:58	2:07	2:10
Watching video on desktop/laptop (per viewer) [4]	N.A.	5:10	5:49	6:03	6:00

4A

A Month In The Life By Quarter | **ALL PEOPLE**	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017
Watching broadcast TV in the home within 28 days (per person)[3]	86:51	90:02	90:16	81:18	79:30
Watching Live TV	77:44	80:22	81:21	72:51	70:52
Watching Playback to 7 TV	7:36	8:03	7:22	6:51	7:04
Watching Time Shift 8-28 TV	1:31	1:36	1:33	1:35	1:33
Watching video on desktop/laptop (per viewer)[4]	N.A.	12:48	12:46	12:07	13:04

5

A Month In The Life Q4 2016	P18-24	P25-34	P35-49	P50-64	P65+	All People
VIDEO VIEWING ON TABLET AND SMARTPHONE:						
Smartphone[7]	9:01	5:12	2:07	0:29	0:08	2:46
Tablet[7]	3:26	4:23	3:10	1:28	0:47	2:34

Watching video on tablet and smartphone is an average per person among online Australians aged 18 and above. Self-reported by survey respondents 18+ in the Australian Connected Consumers Report 2017.

Key to data sources

	OzTAM and Regional TAM: Broadcast TV on in-home TV sets	**OzTAM VPM:** Online TV on connected devices	**Nielsen Online Ratings – Hybrid Streaming:** Video on desktops/laptops	**Australian Connected Consumers Report:** Video on smartphones/ tablets
How measured	Technology	Technology	Technology	Self-reported behaviour
Who measured	Representative sample of homes / individual people; estimates are per head across the population in OzTAM and Regional TAM coverage areas, regardless of whether people watch TV or not	All devices playing participating broadcasters' online content	Tagged data and metered panel data among active online users aged 2+	Survey of online population 18+
Captures	Broadcast TV: live + playback through TV set within seven days + time-shifted viewing between eight and 28 days	Online broadcast TV viewed on a connected device	Broadcast and non-broadcast online video viewed on a desktop or laptop computer	Broadcast and non-broadcast online video viewed on a smartphone or tablet

Footnotes

1. DTT, PVR estimates are based on install levels from the combined OzTAM Metro and Regional TAM panels as at last date of each period.
2. Estimates for internet connection, smartphone in home, tablet household penetration and internet capable TV in home are from combined OzTAM Metro and Regional TAM quarterly Establishment Surveys (ES). Based on mobile and landline CATI ES. Internet connection and tablet penetration are based on rolling four-quarter averages to stabilise month-to-month trends. Estimate for internet capable TV in home refers to the capability to be internet connected, whether connected or not. Smartphone estimates are percentage of homes with at least one smartphone.
3. Consolidated 28 combined OzTAM Metro and Regional TAM databases with overlap homes de-duplicated. Average time spent viewing [ATV 0200-2600 (2am-2am)] across the population within metered markets. Includes free-to-air and subscription television viewing. Fractional minutes have been rounded.
4. Nielsen Online Ratings (NOR) – Hybrid Streaming. Figures are national and per viewer, people 2+. NOR Q2 2016 is based on July 2016 estimate. The market level total time and audience for NOR were progressively understated between January 2015 and June 2016. This was due to the Nielsen meter not capturing all instances of tags from panelists watching YouTube videos and VEVO videos on updated versions of browsers. This was corrected as of July 2016 data in Nielsen Online Ratings - Hybrid Streaming. As a result the historical NOR data and figures for time spent viewing video on internet in the Q1 2015-Q1 2016 Multi-Screen Report should not be used; this is also why watching video on internet per viewer figures do not appear in tables 2, 3, 4 and 4a for Q1 2016. At no time in this period were there any issues or trend breaks in OzTAM or Regional TAM TV data.
5. Combined Metro OzTAM and Regional TAM data defines 'Kids' aged 0-12 and Nielsen Online Ratings - Hybrid Streaming aged 2-11.
6. Combined Metro OzTAM and Regional TAM data defines 'Teens' aged 13-17 and Nielsen Online Ratings - Hybrid Streaming as aged 12-17.
7. Smartphone and tablet video viewing is from Nielsen Australian Connected Consumers Report 2016-2017 (March 2017 edition) - respondents aged 18 years and over (inclusive of total online population regardless of video consumption). National figures produced annually citing 16% of the online population aged 18+ for mobile video audience and 15% for tablet video audience. Online universe figure representative of online audience of 16,681,000 is from Digital Ratings (Monthly) (December 2016). Monthly estimate is based on self-reported weekly time spent multiplied by average number of weeks in a month (4.348). Figure relates to streaming TV, movie and other video content. Due to adjustments in methodology applied to the 2016 Nielsen Australian Connected Consumers Report, the average hours metric across all devices has undergone a trend break. Therefore historical comparisons of this metric in previous Australian Multi-Screen Report editions should not be made.

Explanatory notes

- Estimates for the average number of TVs and mobiles in homes are based on OzTAM Metro and Regional TAM Establishment Surveys. Tablet and desktop/ laptop estimates are based on OzTAM Metro and Regional TAM long Establishment Surveys using hybrid estimates of incidence per home covered by full Household Information/ Household Update surveys.
- Panel install incidence rates for DTT and PVR are based on combined OzTAM Metro and Regional TAM panels as at last date of each period (Q1=end of P4, Q2=end of P7, Q3=end of P10, Q4=end of P13).
- National Establishment Survey (ES) estimates are based on combined OzTAM Metro and Regional TAM quarterly waves. Quarterly Establishment Survey waves are conducted within standard calendar quarters.
- 'Other TV screen use' is TV screen use that excludes live and playback viewing of broadcast television within 28 days of the original broadcast time. Such activity can include gaming; viewing TV network catch up services; watching DVDs; playing back recorded broadcast material beyond 28 days; internet browsing; streaming music; watching video on platforms such as YouTube, Facebook or Vimeo; and watching over-the-top internet delivered video (SVOD) services.
- Time bands cited use the standard 26-hour TV clock. 0200- 2600 is 2am-2am; 1800-2400 is 6pm-midnight.
- Average time spent viewing (ATV) is calculated as the daily average time (0200-2600) within the OzTAM and Regional TAM coverage area universe across all days in the calendar quarter multiplied by the number of days in the quarter divided by three (3). Fractional minutes have been rounded.
- Monthly reach for TV is based on the average of the calendar month cumulative 1-minute reach audience (0200-2600) within the quarter.
- Watching video on a desktop/ laptop is from Nielsen Online Ratings - Hybrid Streaming for Q1 2017 and sourced from the Nielsen Online Ratings Panel, which measures online video activity of active online users aged 2+. Online video viewing is measured using both tagged and metered panel-based data from home and work panels. Video content is defined as a stream where both audio and video are detected and includes broadcast and non-broadcast content. Video viewership excludes adult and advertising content, and downloaded content.
- Nielsen Australian Connected Consumers Report March 2017 based on online national population aged 18+. Historical comparisons of this metric in previous Multi-Screen Report editions should not be made.
- 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 Nielsen Online Ratings - Hybrid Streaming defines 'Kids' as panel members aged 2-11 and 'Teens' aged 12-17.
- OzTAM's VPM Report captures minute-by-minute viewing of participating broadcasters' online 'catch up TV' and live streamed content played to connected devices such as tablets, smartphones, smart TVs, games consoles and desktops/ laptops.

For more information

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