

## AUSTRALIA'S FIRST EVER MULTI-SCREEN REPORT REVEALS EVOLUTION IN TELEVISION VIEWING

- **New technologies encourage viewing of video content across multiple screens**
- **Strong, positive relationship between screen size and propensity to view**
- **Viewing via traditional TV sets remains high and growing**

20 February, 2012

New technologies such as personal video recorders (PVRs), Internet-delivered video, tablets and smartphones, coupled with burgeoning up-take of digital terrestrial television (DTT), are increasingly impacting Australians' television viewing habits, according to a new report released today.

The first **Australian Multi-Screen Report** – compiled collaboratively by global information and measurement company, **Nielsen**, and Australia's official television audience measurement providers, **OzTAM** and **Regional TAM** – shows the extent to which new technologies are stimulating and enhancing viewing of broadcast content ('video') beyond conventional television sets.

The report reveals that viewing of broadcast content via traditional TV sets remains strong and is growing.

Meanwhile, smaller, more mobile and Internet-enabled devices – along with improved Internet connectivity – are creating new opportunities to view video content; although viewing via such devices remains low in comparison to conventional TV viewing, strong growth has been observed in the past year.

### Key findings as of Q4 (October-December) 2011

#### Overall TV viewing is strong and rising

- Households have greater choice and access to DTT:
  - 95% of all homes have at least one DTT-enabled TV set (up from 90% in Q1 2011)
  - 70% of homes can receive DTT on every working TV set in the home (up from 55% in Q1)
- 44% of households have access to time-shifting devices, such as PVRs (up from 37% in Q1)
- Combined, these factors give viewers greater choice and access to television content and are stimulating viewing via traditional means:
  - Average **monthly** time spent viewing television broadcast content in the home via conventional TV sets increased by 6.1% between Q4 2010 and Q4 2011 (by 6 hours and 31 minutes) to 113 hours and 38 minutes (All People figures). [NB: TV viewing behaviour of course fluctuates seasonally, with viewing increasing in winter time]
  - Average monthly time spent viewing playback (recorded) television content has increased by 4 hours and 31 minutes (60%) since Q4 2010, now at 12 hours per month in Q4 2011

- Approximately 99% of Australian households have at least one working TV set. Overall TV monthly reach (that is, where people watch at least some television during the period) has increased from 97% in Q4 2010 to 98% of Australians nationally in Q4 2011.

**There is a strong and positive relationship between screen size and propensity to view**, with people demonstrating a preference to watch content on the largest screen available.

#### **Online video viewing is rising but remains small in comparison to conventional TV**

- 77% of households are connected to the Internet (77% in Q1), providing potential access to online television video content:
  - Australians spent an average of 43 hours and 54 minutes per month using the Internet on a PC in Q4 2011 (up slightly from 43 hours and 33 minutes in Q1)
  - Australians spent an average of 3 hours and 27 minutes per month watching **any** online video (not just television broadcast content) in Q4 2011, up from 2 hours and 7 minutes in Q1 2011

#### **Smartphone take-up is increasing but video viewing on such devices remains small**

- An estimated 49% of Australians aged 14+ years own a smartphone (35% in Q1)
- Video usage on smartphones has seen strong increases but still trails traditional TV viewing by a long way:
  - Video usage on mobile phones is largely dictated by available services and associated service costs. Current estimates suggest this usage is relatively light but growing rapidly
  - Users spend an average 1 hour and 20 minutes per month watching **any** video (not just television broadcast content) on a mobile phone (35 minutes in Q1), suggesting usage of such devices to view TV video content remains small

#### **Take-up of tablets is increasing**

- An estimated 10% of metro households own at least one tablet device
- Watching **any** video content on tablets grew from just 2% of the total online population at the end of 2010 to 5% by the end of 2011

#### **People aged 18-34 are the heaviest consumers of online video and video on mobile phones**

#### **The combination of the extended screens (PC and mobile phone usage) for any video content still accounts for just 4% of the video consumption on traditional TV sets**

- 3 hours 27 minutes per month on PCs (All People)
- 1 hour 20 minutes per month on mobiles (people aged 14+)
- 113 hours 38 minutes per month on a traditional TV (All People)

"The introduction of DTT and time-shifted viewing, and the speed with which Australians are adopting new technology which delivers broadcast content anywhere, anytime has impacted the way in which traditional television content is accessed," observed Matt Bruce, head of Nielsen's media industry practice group in Australia. "The Australian Multi-Screen Report confirms that new technology and devices are adding to, rather than replacing, Australians' TV viewing, and for media owners, agencies and advertisers, these findings provide much-anticipated insights into the way media is consumed, thereby helping to understand viewing habits and more successfully reach and engage with audiences across multiple screens."

The Australian Multi-Screen Report will be released quarterly.

It highlights the trend in video viewing in Australian homes across television, computers and mobile devices by combining data from the OzTAM and Regional TAM television ratings panels with Nielsen's national NetView panel and Consumer & Media View database.

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**Sources:** OzTAM, Regional TAM, Nielsen

**A copy of the report is available upon request. Please contact:**

Margaret Fearn  
Fearnace Media  
M: 0402 259 064

Warren Gillmer  
Nielsen  
T: (02) 8873 7165

#### **About Nielsen**

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence, mobile measurement, trade shows and related properties. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands. For more information, please visit [www.nielsen.com](http://www.nielsen.com)

#### **About OzTAM**

OzTAM is Australia's official source of television audience measurement (TAM) covering the five metropolitan markets (Sydney, Melbourne, Brisbane, Adelaide and Perth) and nationally for subscription television. OzTAM ratings are the accepted metric by which Australian television is evaluated. The media industry uses OzTAM data to assist in program development, advertising planning and to gauge the performance of television programs, networks and advertising campaigns. More at: [www.oztam.com.au](http://www.oztam.com.au)

#### **About Regional TAM**

Regional TAM Pty Limited is a joint venture comprising the five free-to-air (FTA) regional commercial networks – NBN Limited, Prime Television Pty Ltd, Seven Queensland, Southern Cross Austereo, and WIN Corporation Pty Ltd. Collected and marketed by Nielsen Television Audience Measurement, Regional TAM data is the official television audience measurement (TAM) of FTA and Subscription Television viewing in the five east coast aggregated regional markets, including its 19 component sub-markets, and the Regional Western Australian market. Regional TAM television ratings information is designed to be an independent, reliable and transparent audience measurement system that provides the currency by which television is bought, sold and evaluated. The audience data is used by a range of parties such as television networks, advertisers, media buyers and programme suppliers to aid them to understand viewer behaviour, and in assessing programme or network performance. More at <http://www.regionaltam.com.au>