

## **AUSSIES WATCH MORE TV YEAR-ON-YEAR, TAKE-UP OF NEW SCREENS RISES: Q1 2014 MULTI-SCREEN REPORT**

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16 July, 2014

The latest **Australian Multi-Screen Report** (Q1 2014) shows that while Australians' take-up of connected devices continues to rise they are also watching more broadcast television year-on-year.

Although people's screen habits are evolving, particularly among younger people, all major age groups spend the majority of their viewing time watching broadcast TV on in-home sets.

In most cases Australians are using new technologies to add to or complement their viewing of 'traditional' TV. The use of laptops, tablets and mobile phones for watching video is increasing but is not the primary activity undertaken on these connected devices.

### **NEW TECHNOLOGIES IN AUSTRALIAN HOMES**

As in previous quarters, **tablets** have the fastest adoption rate, now in an estimated 42 per cent of homes (up from 31 per cent in Q1 2013 and 40 per cent in Q4 2013).

69 per cent of Australians aged 16+ own a **smartphone** (61 per cent a year ago).

**Internet capable TVs** are now in 27 per cent of homes (21 per cent in Q1 2013).

**PVR** penetration is stable year-on-year at 54 per cent of homes, and 14 per cent have two or more.

Australia's transition to fully-digital television was completed in December 2013. From the start of 2014, Australian television homes could access digital terrestrial television (**DTT**) channels on at least one household TV set. By the end of Q1 2014, 93 per cent could access DTT channels on all working sets in the home.

**Household internet connection** is stable year-on-year at 80 per cent.

### **VIEWING ON TELEVISIONS AND OTHER DEVICES**

Most Australians watch TV at home and live-to-air.

In Q1 2014 people watched an average of 93 hours and 16 minutes (93:16) of **broadcast television** each month on their in-home TVs, up 37 minutes on the same quarter a year earlier.

Age groups watching more broadcast TV year-on-year include under-12s (an additional 3:29); 18-24s (+44 minutes); 35-49s (+57 minutes); and people 65+ (+11 minutes).

92.2 per cent of all TV viewing was live-to-air ('Live'), with 7.8 per cent (7:15) 'Playback', that is, viewing of TV content that people record and watch at normal speed within seven days of original broadcast.

Most age groups increased their Playback viewing time year-on-year, with Australians on average spending 27 minutes more each month doing so in Q1 2014 than a year earlier.

Australians spent 7:48 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)<sup>1</sup>.

Video viewing on smaller, connected devices continues to rise in tandem with their progressive take-up.

Across the Australian population aged 16 and over, people claim to spend 1:56 per month watching any online video on a mobile phone and 1:47 on tablets.<sup>2</sup>

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



### SIMULTANEOUS SCREEN USE

Australians' steady take-up of online devices sees a growing number of people use these technologies to '**multi-task**': watch TV and access the internet simultaneously.

While in pre-internet times people would sometimes read magazines, newspapers or speak on a landline telephone while watching television, today online devices are in many cases being used as a complementary screen by the person watching TV.

74 per cent of online Australians aged 16+ said they ever watch TV while using the internet<sup>3</sup> – the same as a year earlier and compared to 60 per cent claiming to ever do so in 2011.

<sup>1</sup> Nielsen Online Ratings – Hybrid data, May 2014.

<sup>2</sup> Nielsen Australian Connected Consumers Report 2014. Q4 2013.

<sup>3</sup> Nielsen Australian Connected Consumers Report 2014. Q4 2013.

67 per cent of online Australians say they do so at least once a month, and 8 per cent report doing so less frequently.

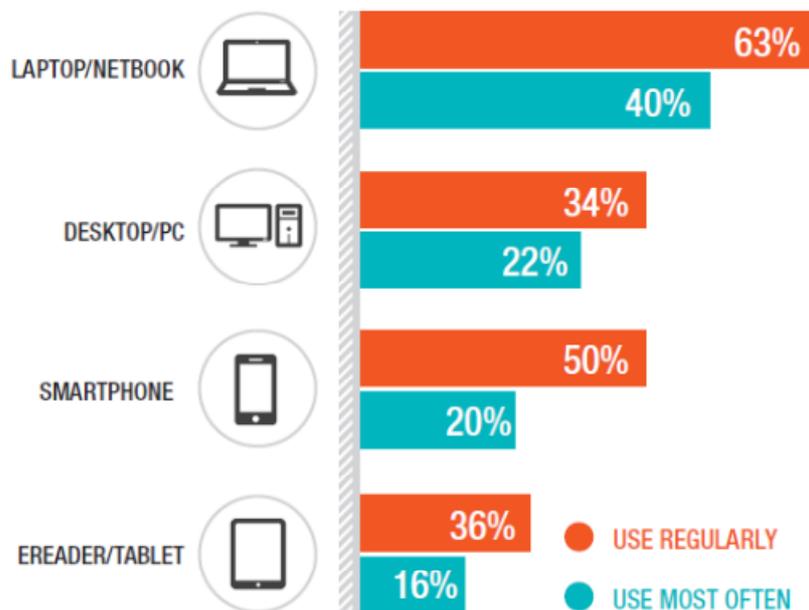
Women are slightly more inclined to multi-task than men: 76 per cent of online women aged 16+ claim to ever do so compared to 73 per cent of men.

Across the population 16+, people who multi-task say they most often use their laptop/netbook computers for this activity, followed by desktop computers, mobile phones and then tablets, reflecting relative household ownership rates of these technologies.

**74%**

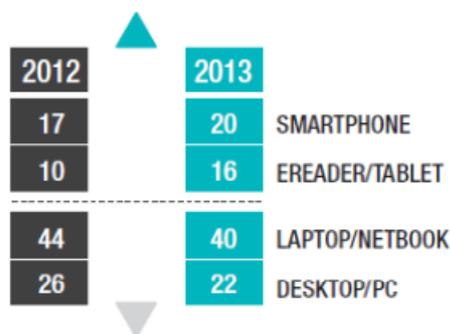
of online Australians ever simultaneously consume TV + internet

Other devices such as portable media players, games consoles, and internet-enabled TVs are used to multi-task but to a lesser extent



**USE MOST OFTEN**

Laptops and desktops are still dominant but mobile devices are growing in popularity



As connected devices put the world at a user's fingertips it's understandable Australians primarily use their laptops/desktops and tablets for conducting searches and email. The top online activities people use their mobile phones for are getting weather or map/directional information.

Differing behaviour on computers/tablets and mobile phones reflects the nature of the devices: as people take mobile phones with them on the go it makes sense they are used for tasks such as getting directions, while tablets are more widely used in the home and therefore more like a traditional computer.

**TOP ACTIVITY BY DEVICE**  
TOTAL PEOPLE

DESKTOP/LAPTOP	SMARTPHONE	TABLET
1 Email	= 1 Maps/directions	1 Conducting a search (i.e. search engine)
2 Conducting a search (i.e. search engine)	= 1 Weather	2 Email
3 Banking/bill payment	3 Email	3 News
4 Researching products/services/businesses	4 Conducting a search (i.e. search engine)	4 Weather
= 5 Accessing government services/government-related information	5 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter)	= 5 Researching products/services/businesses
= 5 News	6 News	= 5 Maps/directions
7 Weather	7 Travel/transport information	7 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter)
= 8 Updating your social media profile or browsing other people's profiles, posts, photos, messages etc. (e.g. Facebook, LinkedIn, Twitter)	8 Banking/bill payment	8 <b>Watching online video</b>
= 8 Travel/transport information	9 Researching products/services/businesses	= 9 Sporting news/information/results
10 Maps/directions	10 Sporting news/information/results	= 9 Travel/transport information
11 Watching online video	=11 Listening to streamed/downloaded music or radio	
	=11 <b>Watching online video</b>	

**EVOLVING VIEWING PATTERNS BY AGE GROUP**

The way Australians use their TV screens is changing as households increasingly adopt new technologies attached to the television set. Moreover, different age groups' use of the television set varies throughout the day and week, and their online activities on connected devices vary, too.

Points of interest include<sup>4</sup>:

**Kids**

- Overall TV use in the morning is proportionately greatest among children aged 0-12.
- Under-13s are more likely than the population as a whole to use their TV sets for Other Uses (such as gaming, online activities on the TV, and Playback beyond the 7-day Consolidated viewing window).

<sup>4</sup> TV and Total TV Screen Usage: OzTAM, Regional TAM Q1 2014. PC/Laptop, mobile phone and tablet activities: Nielsen Australian Connected Consumers Report 2014.

- Even so, kids spend two thirds of their TV screen time watching Live TV: on average 65:06 per month, up 3:29 since Q1 2013.

### Teens

- While teens (ppl 13-17) use their TV screens proportionately more than the population as a whole for Other Uses, they still spend the majority of their time with the TV screen watching Live and Playback TV.
- 16-17 year-olds report the most amount of time watching video on mobile phones, at 8:48 per month (Q4 2013).
- People 16-17 (along with 25-34s) have the greatest tendency of all online Australians to multi-task: 89 per cent of online 16-17 year-olds report ever doing so (74 per cent across the total online population); 82 per cent of teens claim to multi-task at least monthly.
- Social media is the online activity 16-17s most often use tablets for, followed by email. They use laptop and desktop computers primarily for search and email.
- Watching online video is 16-17 year-olds' fourth most common activity on computers, sixth on tablets and tenth on smartphones.

### 18-24s

- 18-24s spend the most time in aggregate of any age group watching TV and other video on connected devices – 24:07 per month across PC/laptops, plus their claimed viewing on tablets and mobiles, compared to 45:14 watching TV on conventional sets.
- Although 18-24s are among the lightest TV viewers they spent 44 minutes more per month watching TV in Q1 2014 than they did a year earlier.
- While Live TV drives 18-24s' evening viewing, they spend nearly equal amounts of time watching Live TV and using the TV screen for Other purposes in the afternoons on both weekdays and weekends.
- 87 per cent of online 18-24s say they ever multi-task, just behind teens and 25-34s.
- Getting directions/maps and email are 18-24s' most common online activities on mobile phones; they use tablets and computers most often for search and email.
- Watching online video is 18-24s' fifth most common activity on computers, fourth on tablets and eleventh on smartphones.

### 25-34s

- 25-34s (like most age groups) increased their Playback viewing year-on-year, watching an average 6:56 per month in the quarter (+50 minutes each month).
- As an age group 25-34 year-olds are the second-heaviest viewers of video on a PC/laptop, spending 10:05 per month doing so in Q1 2014.

- Online Australians aged 25-34 (along with teens) are the age group most likely to multi-task: 89 per cent report ever doing so (74 per cent across online Australians 16+.)
- 25-34s use their laptops most often for multi-tasking, followed by mobile phones, desktops and then tablets.
- 25-34s' top online activities are search and email (on computers), search, email and getting news (tablets), and checking weather, directions and email (mobile phones).
- 25-34s say watching online video is their fourth most common activity on tablets, eighth most popular activity on desktop/laptops, and eleventh on their smartphones.

### **35-49s**

- 35-49s increased their broadcast TV viewing by 57 minutes year-on-year to 98:06 per month in Q1 2014.
- 81 per cent of online 35-49 year-olds say they ever multi-task, with 73 per cent claiming to do so at least once a month.
- 35-49s use their laptops most often to multi-task, desktops second, and mobile phones and tablets third.
- The top online activities among 35-49s are email and search (tablets and computers), and checking weather and directions (mobile phones).
- Watching online video is 35-49s' seventh most-common self-reported activity on tablets, though video viewing falls outside their top ten on desktop/laptops and smartphones.

### **50-64s**

- 50-64s watched an average 124:37 per month of broadcast television in Q1 2014, including an additional 30 minutes each month of Playback (now 9:40/month).
- People 50-64 spent 5:20 per month viewing video on a PC/laptop in the quarter.
- 50-64s report spending 51 minutes and 25 minutes per month viewing video on tablets and mobile phones, respectively.
- 68 per cent of online Australians aged 50-64 say they ever multi-task; 58 per cent claim to do so at least once a month.
- 50-64s use laptops most often to multi-task, followed by desktop computers, tablets and then mobile phones.
- 50-64s' most common online activities are email and search (tablets and computers), and checking weather and directions (mobile phones).
- Online video viewing is their tenth most common self-reported activity on tablets, and twelfth on computers and smartphones.

## People 65+

- People over 65 are the heaviest TV viewers, spending 150:36 each month watching broadcast TV in Q1 2014 (+11 minutes year-on-year).
- People 65+ increased their Playback viewing year-on-year more than other age groups (+1:47 per month to 9:51 each month in the quarter).
- While over-65s are the least likely of all age groups to use their TV sets for purposes other than watching broadcast television, their Other Screen Usage is most pronounced in the afternoons and evening peak.
- Over-65s are less likely than other age groups to multi-task: 48 per cent claim to ever do so (vs 74 per cent of all Australians 16+.) 52 per cent of people 65+ say they do not watch TV and access the internet at the same time.
- When they do multi-task, people 65+ use laptops most often, just ahead of desktops and well ahead of tablets, with mobile phones their least commonly used device to multi-task.
- Over-65s' principal online activities are email and search (laptops and tablets) and checking weather and directions/maps (smart phones).
- Viewing online video is outside over-65s' top-ten most common online activities on connected devices: twelfth on computers, thirteenth on smartphones and eleventh on tablets.

**Nielsen's Senior Vice President, Cross Platform Audience Measurement, Erica Boyd** said: "With increasing media touch points, we are all consuming more content now than ever before: more TV, more video, more audio and more text. While video is not a primary activity conducted on mobile screens today, these additional media devices present large opportunities for programmers and advertisers to increase engagement with viewers through multi-screen strategies and ultimately better understand engagement levels of TV viewers across media touch points.

"The task-ahead is for broadcasters and brands to work together to engage eye balls with compelling content that keeps viewers attached to the main screen when it matters. In addition, opportunities exist for those who develop smart cross-platform strategies and executions that use the second and third screens to enhance and complement the main screen, extending advertising reach and resonance and engagement across multi-screening audiences," said Boyd.

**OzTAM CEO Doug Peiffer** said: "The latest Multi-Screen Report provides an opportunity to reconsider some stereotypes about Australians' TV habits. For example, while people 50+ watch the most TV the drop off in younger audiences is often over-stated, and kids and 18-24s have actually increased their TV viewing on TV sets year-on-year. Though 18-24s are the heaviest viewers of video on connected devices, two-thirds of their viewing is still to broadcast TV. And the time over-50s spend watching online video each month on computers, tablets and mobiles shows Australians of all age groups are embracing the additional viewing opportunities new screens provide."

## SUMMARY OF KEY FINDINGS: Q1 (JANUARY – MARCH) 2014:

- Australians watch on average 93 hours and 16 minutes (93:16) of broadcast TV on traditional television sets per month<sup>5</sup> - up 37 minutes per month year-on-year.
- 92.2% of all broadcast TV viewing is Live, with Playback of broadcast content that viewers record and watch within seven days accounting for 7.8% (7:15 per month).
- 93% of Australian television homes can access digital terrestrial television (DTT) channels on every working household TV set.
- 54% of homes have PVRs; 14% have two or more (53%; 13% in Q1 2013).
- Household internet penetration is stable at 80%.
- Australians spend on average 38:41 per month online<sup>6</sup>.
- Internet capable TVs are in 27% of homes (21% in Q1 2013).
- 42% of homes have tablets (31% in Q1 2013).

Across the online population aged 16+, people claim to spend an average 1:47 per month<sup>7</sup> using tablets to watch *any* online video, which can include both broadcast TV and non-broadcast content.

- 69% of Australians aged 16+ own a smartphone (61% in Q1 2013) and self-report an average 1:56 per month<sup>8</sup> viewing any video on these devices (1:20 a year earlier).
- 12.323 million Australians watch some video (both television broadcast and non-broadcast content) on the Internet each month: an average of 7:48 per month. Such viewing is highest among people aged 18-24 (16:28)<sup>9</sup>.
- 89% of *all* video viewing<sup>10</sup> – across all screens, and including broadcast and non-broadcast video – is on the traditional TV set<sup>11</sup>:
  - 93:16 per month on the TV set (89%)
  - 7:48 per month online via PCs/laptops (7.4%)
  - 1:56 per month on smartphones (1.8%)
  - 1:47 per month on tablets (1.7%)

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

**Further detail is provided in the report, available upon request.**

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<sup>5</sup> All people figures. 2am-2am.

<sup>6</sup> Nielsen Online Ratings. Ppl 2+.

<sup>7</sup> Nielsen Australian Connected Consumers Report 2014.

<sup>8</sup> Nielsen Australian Connected Consumers Report 2014.

<sup>9</sup> Nielsen Online Ratings – Hybrid Streaming (formerly VideoCensus) ppl 2+. Please note March 2014 constituted a trend break for all key audience metrics from Nielsen Online Ratings – Hybrid, with the removal of 'inactive' panellists.

<sup>10</sup> Time spent viewing via the conventional TV includes **broadcast content only**; video viewing on PC, tablets and smartphones ('other devices') can include both broadcast and non-broadcast video.

<sup>11</sup> TV viewing: All People, Q1 2014, 2am-2am. Other devices: Ppl 16+ smartphones/tablets, Q4 2013; Internet: Ppl 2+, Q1 2014, Nielsen Online Ratings.

### **About The Australian Multi-Screen Report**

The Australian Multi-Screen Report, released quarterly, is the first and only national research into trends in video viewing in Australian homes across television, computers and mobile devices. It combines data from the three best available research sources: the OzTAM and Regional TAM television ratings panels and Nielsen's national NetView panel, Consumer & Media View database and Australian Connected Consumers Report.

### **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 and mobile measurement. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands. For more information, 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 program suppliers to aid them to understand viewer behaviour, and in assessing program or network performance. More at <http://www.regionaltam.com.au>