

AUSTRALIAN MULTI-SCREEN REPORT

TRENDS IN VIDEO VIEWERSHIP BEYOND
CONVENTIONAL TELEVISION SETS

QUARTER 1
2013



oztam
measuring audiences

REGIONAL
TAM
TELEVISION AUDIENCE
MEASUREMENT

nielsen

VIDEO CONTENT ACROSS MULTIPLE SCREENS

The latest edition of the Australian Multi-Screen Report (Q1 2013) highlights the increased prevalence of newer technology present within Australian homes. This report includes

insights into the relative use of these screens as well as the increasing tendency to utilise more than one screen simultaneously.

THE MULTIPLE SCREEN HOUSEHOLD

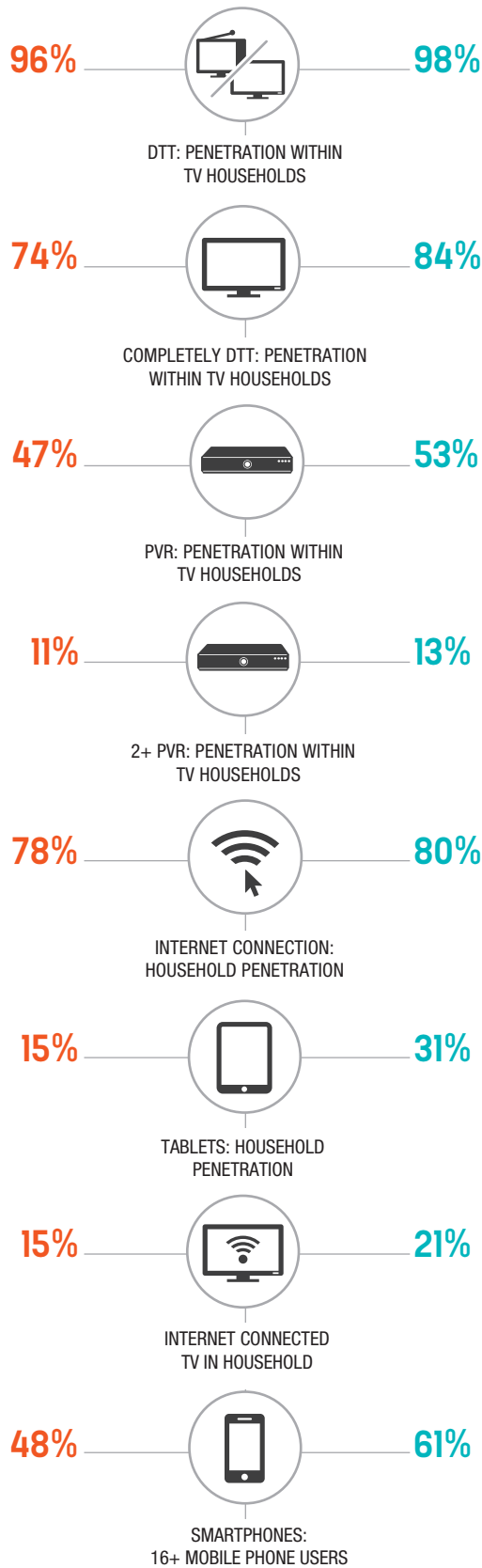
Australians of all age groups continue to spend the majority of their screen time with the in-home TV set. As new screen technologies enter the home, they are being used to complement TV viewing – whether on the sofa or, thanks to the mobility of these devices, other parts of the home. Changing viewer behaviour is evident with homes acquiring internet-enabled TV sets, people using tablets in place of desktop and laptop computers, and smartphones in more pockets than ever. Currently, 27 percent of Australian homes have each of the four screen types: TV, PC, tablet and mobile phone, up from 16 percent a year ago.

The most significant increases for technology in the home that allow for the viewing of video have been with mobile devices. Smartphone uptake has gone up by 13 percentage points (based on people 16+) since Q1 2012, while tablet penetration has more than doubled: close to a third (31%) of Australians now have a tablet in the home, with time spent watching online video on tablets for online Australians currently at 50 minutes per month (Nielsen Australian Connected Consumers Report).

TECHNOLOGY PENETRATION

Q1 2012

Q1 2013



With the national rolling analogue switch-off that commenced regionally in 2010 now in its final scheduled year, digital television penetration levels are edging ever closer to 100 percent. In addition, 84 percent of Australian homes now have *all* their TV sets capable of receiving Digital Terrestrial Television (DTT). The recent transition of the Brisbane, Adelaide and Perth metropolitan markets to digital-only continues this process, and any final potential impact to DTT penetration levels from these markets will be further reflected in the upcoming Q2 2013 results.

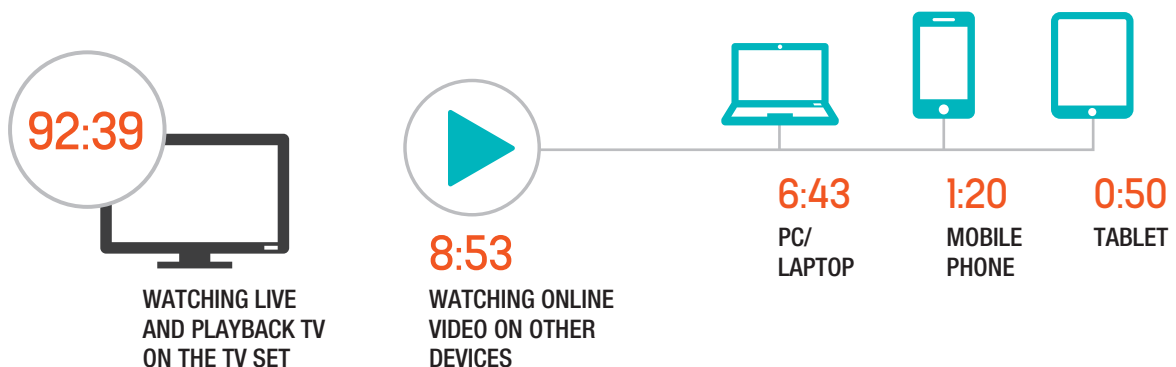
Over the last year, Australia has moved over the 50 percent mark for household PVR penetration. The steady increase in Playback viewing in the last few years as seen on the chart on page 10 "TARP – Total Individuals" (as well as the potential for Playback viewing

after 7 days within the growing 'Other screen usage' component) suggests the influence this increase in penetration is exerting i.e. giving more people the opportunity to watch television programming at the time of their choosing.

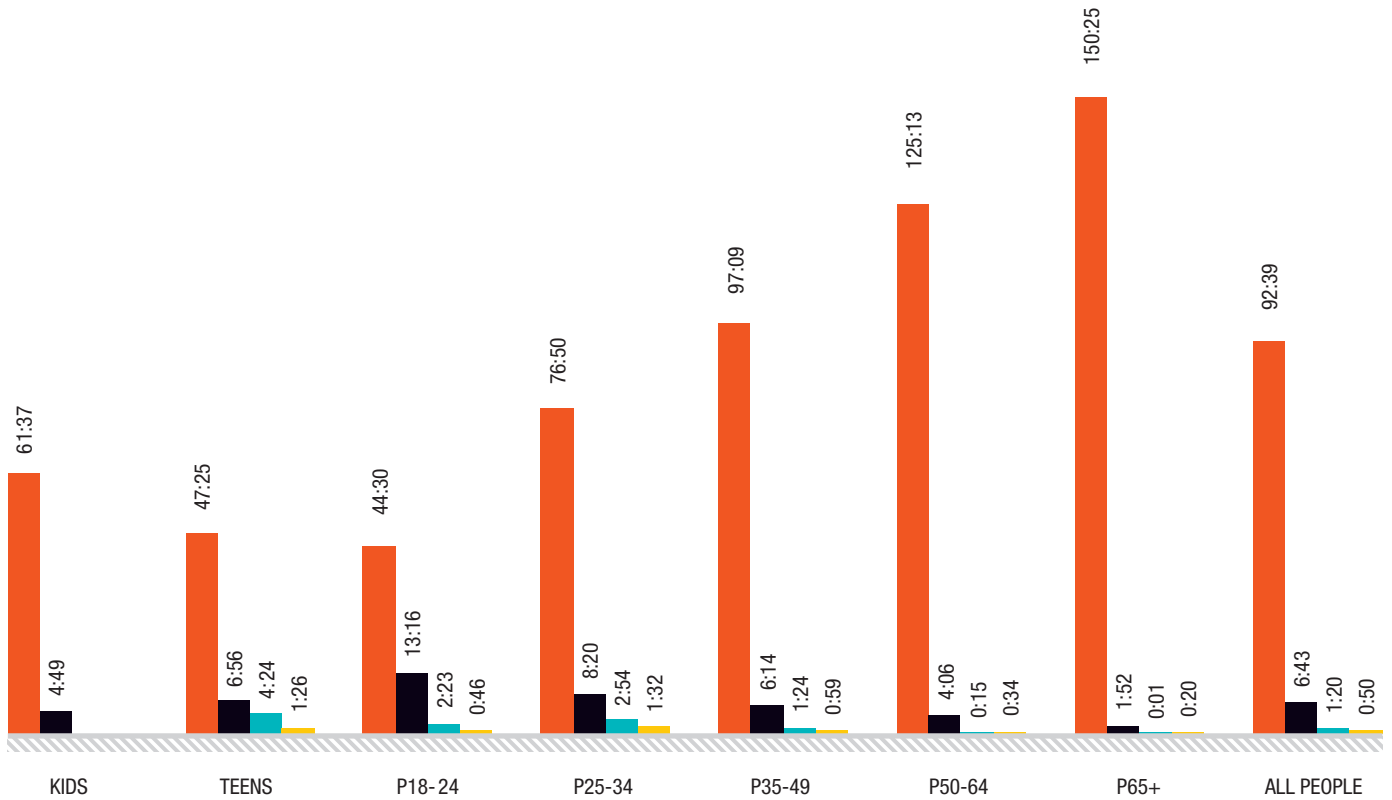
The traditional television set is still primarily used to watch Live TV, however new devices either built-in or connected to the TV set (such as game consoles or PVRs) create further opportunities to use the TV set to watch recorded television, other video, play games and access other content. This in turn can boost the overall time spent with the primary household TV screen.

Not surprisingly, the amount of time spent watching video content and other video varies greatly depending on the device.

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



MONTH IN A LIFE - TV / PC / TABLET / PHONE



WATCHING TV IN THE HOME



WATCHING ONLINE VIDEO ON PC/LAPTOP (P16+)



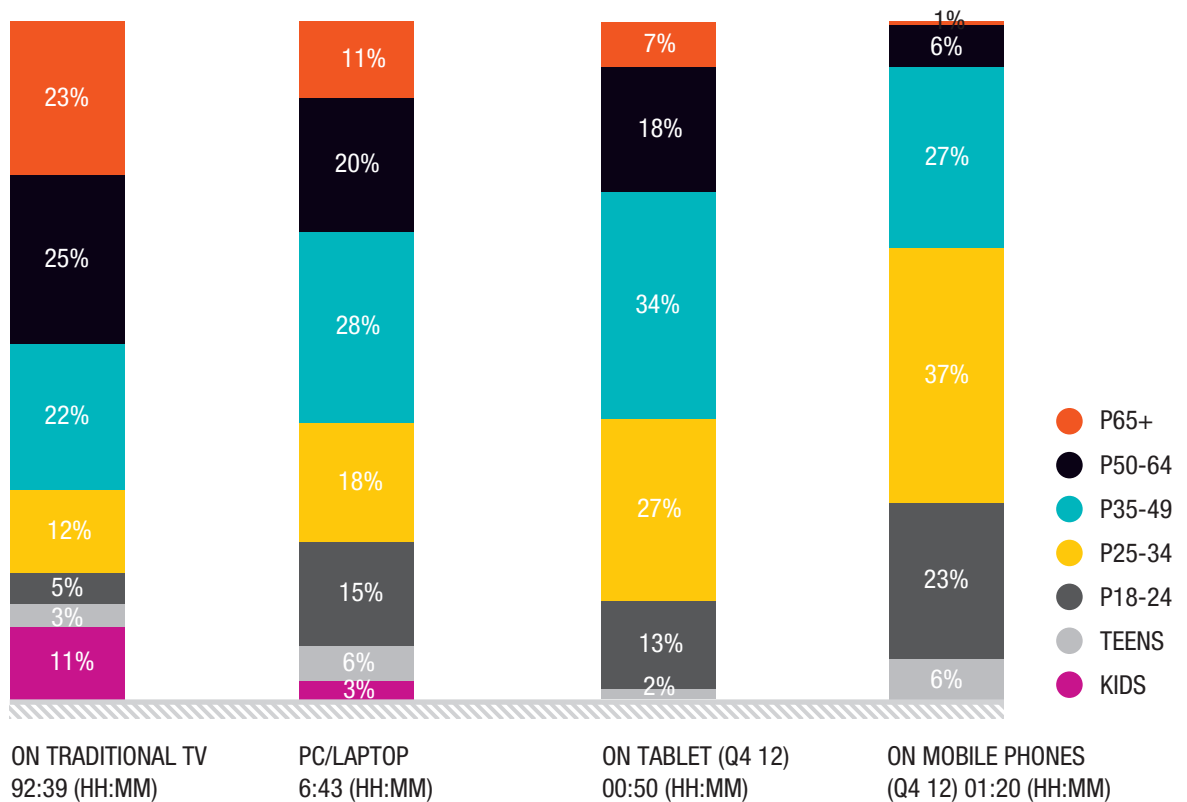
WATCHING ONLINE VIDEO ON MOBILE PHONE (Q4 12) (P16+)



WATCHING ONLINE VIDEO ON TABLET (Q4 12) (P16+)



VIDEO AUDIENCE COMPOSITION TV / PC / TABLET / PHONE



Taking a closer look at viewing on the screens other than television (PCs, tablets and mobile phones), we observe more viewing of online video on the desktop PC or laptop compared to mobile devices, with 11.4 million Australians doing so, spending an average of 6 hours and 43 minutes a month. In comparison, viewing on tablets and mobile phones are comparatively lower (2.4 million and 1.2 million respectively). However, this is as expected given the penetration of smartphones and tablets are not as widespread as the more traditional desktop PC or laptop (yet). For these newer screens, more of the population watch online video on mobiles than they do on tablets, but again this has to do

with greater penetration of smartphones than tablets in the market (a ratio of two to one).

While penetration of devices has much to do with the overall incidence of viewing across screens in the broader population, there are indications that audiences are preferring certain screens over others. For example, among the user base (i.e. of those using each device), tablet users spend more time watching online video than mobile users. This provides some indication that as penetration of tablets increases it can be expected that this screen will be a popular screen for viewing content in the future – surpassing mobile phone viewing.

SIMULTANEOUS SCREEN USE

The tendency for people to multi-task is nothing new, but compared to years past when people read physical magazines and newspapers or chatted on a landline phone while watching TV, we now see the rising use of internet-connected devices such as laptop computers, tablets and smartphones.

The steady take-up of connected devices has seen an increase in multi-tasking among Australians aged 16 and over who are online.

Nielsen's annual Australian Connected Consumers report showed that in 2012, 74 percent of online Australians aged 16 and over say they multi-task – up from about 60 per cent in 2011.

Of the 74 percent of online Australians who engage in simultaneous screen use of TV and the internet, almost a third are doing so daily (32%) and more than half are doing so almost every day or more often (54%). The vast majority of online Australians who multi-task internet and TV media do so at least once a week (79%). While more younger online Australians (under 35 years of age) engage in simultaneous screen use, those aged 25 years and above are more likely to do so very frequently (on a daily basis) than younger online Australians aged 16-24 years. Women also multi-task more frequently than men.

When multi-tasking, people use a range of devices. The incidence and regularity with which they do so reflects the relative penetration of these technologies.

Laptops and desktop computers, which have the highest household ownership rates compared to other devices, are the primary devices used for multi-tasking, although this is declining compared to a year ago.

Conversely, mobile devices such as tablets and smartphones/mobile phones have doubled in popularity as the primary device used for dual screening behaviour. Primary usage is expected to grow with further adoption of these devices in 2013.

Around the world, audience researchers are looking to better understand the impact of tablets on television viewing. The results of a special tablet study undertaken by Nielsen, OzTAM and Regional TAM in the second half of 2012 suggest that tablets are complementary, rather than substitutes, for TV screen use. The study also showed that following an initial exploratory period after the introduction of a tablet, total household TV screen use returned to normal levels, with viewing of live TV rising in some cases. Further details can be found in The Australian Multi-Screen Report Q4 2012.

A follow up of homes from this special study also suggests that tablets continue to be the primary screen to be used simultaneously with TV in these homes, followed by smartphones, supporting the findings from the 2012 Australian Connected Consumers report. The proportion of people claiming to use their iPad simultaneously while watching TV on the TV set remained steady in the study homes. On weekdays and weekends, dual screening on all devices peaks between 6pm and 9pm. Reading messages or

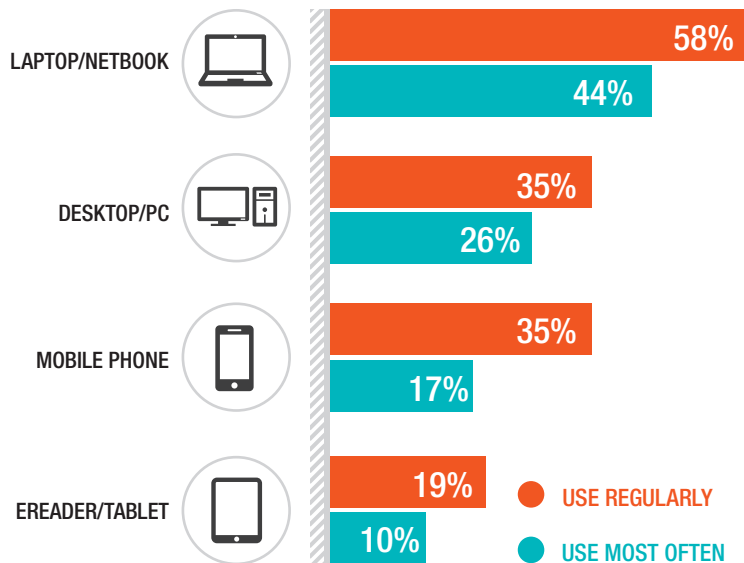
communicating with others online in general and accessing other, unrelated entertainment content remain the most popular activities by people within the study homes. There is however a noteworthy increase in the number of people reading messages or communicating with others online related to the TV program being watched from 2012. Lastly, the overwhelming majority of people in study homes continue to nominate the TV set as their primary viewing device, for both Live and Playback viewing.

MOBILE DEVICES ARE POPULAR FOR MEDIA MULTI-TASKING TV + INTERNET

74%

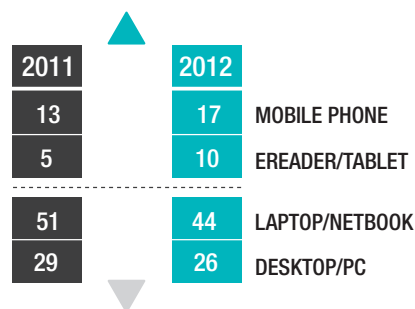
of online Australians ever simultaneously consume TV + internet

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



USE MOST OFTEN

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



Source: Nielsen Australian Connected Consumers Report

THE TELEVISION SCREEN

Total overall use of the traditional television screen remains strong, with both Playback and Other screen usage continuing to increase.

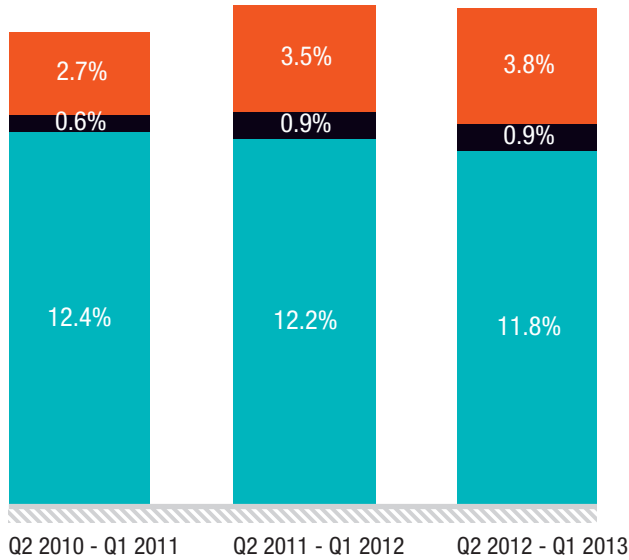
Just over nine in ten (93%) of all television viewing is Live and such viewing increases with age from 18-39 onwards. Other screen usage (which includes using the TV for gaming and online activities on the TV, as well as Playback outside the 7-day Consolidated viewing window) is more popular with those under 40, although younger audiences spend most of their screen time watching Live TV.

During Q1, 2013, Australians viewed an average of 92 hours and 39 minutes each month via the television set.



VIDEO AUDIENCE COMPOSITION: TRADITIONAL TV

TARP - TOTAL INDIVIDUALS

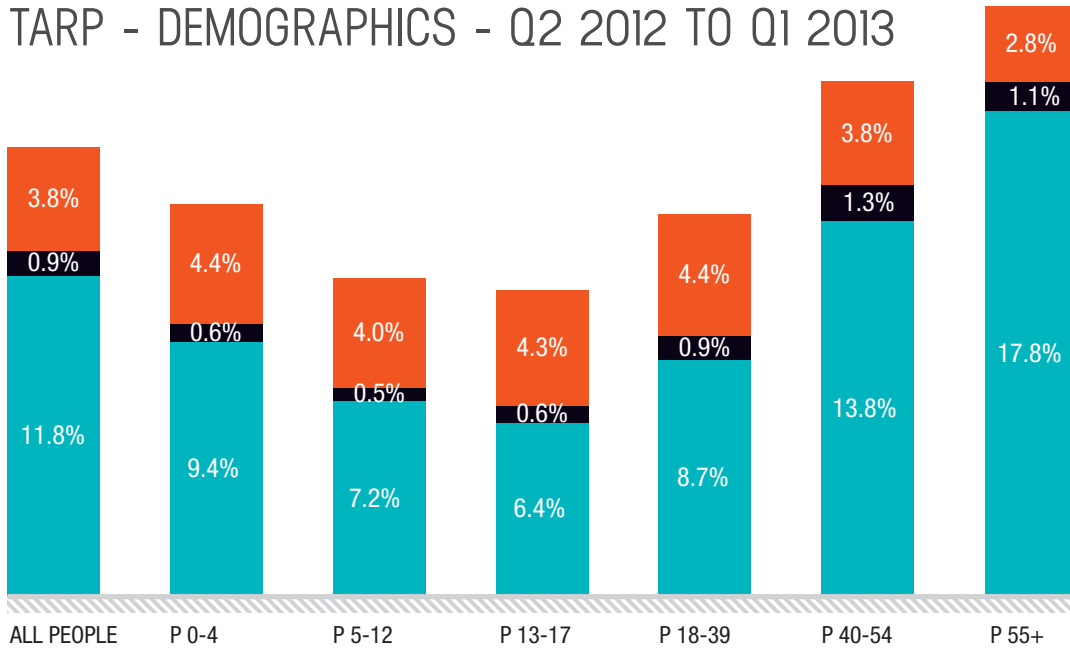


TECHNOLOGY	Q1 2013	Q1 2012
PVRs:	53%	47%
2+PVRs:	13%	11%
Smart TVs:	21%	15%

● LIVE ● PLAYBACK ● OTHER SCREEN USAGE

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

TARP - DEMOGRAPHICS - Q2 2012 TO Q1 2013



● LIVE ● PLAYBACK ● OTHER SCREEN USAGE

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

THE PC/LAPTOP SCREEN

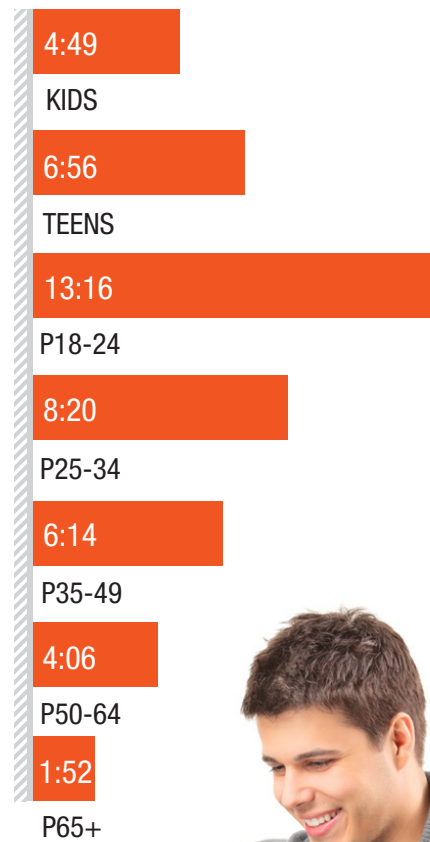
Four in five Australian homes (80%) have internet connected computers. On average, Australians spend 6 hours and 43 minutes per month watching online video on their PCs. Watching online video on PCs (desktops and laptops) decreases with age.

Nielsen's Australian Connected Consumers report states that of the online population that have ever used a PC to access the internet, 52 percent have claimed to watch online video.

TOP TEN ACTIVITIES PERFORMED ON PCS:

- 01 Email
- 02 Conducting a search (i.e. search engine)
- 03 Buying items online
- 04 Banking/bill payment
- 05 News
- 06 Weather
- 07 Maps/directions
- 08 Accessing government services/ government-related information
- 09 Researching products/services/ businesses
- 10 Travel/transport information

VIDEO AUDIENCE COMPOSITION: PC/LAPTOP



80%

AUSTRALIAN HOMES HAVE INTERNET CONNECTED COMPUTERS

Source: Nielsen Australian Connected Consumers Report

THE TABLET SCREEN

We have seen tablets enter 31 percent of homes, which is more than double the penetration from a year ago (15%).

Across the population, on average, Australians (16+) are now spending 50 minutes viewing to any online video on their tablet devices each month.

By age group, while we do observe a tendency to younger age groups, it is people in their late twenties and early thirties who are contributing the highest levels of viewing and older age groups are also using tablets to view video.

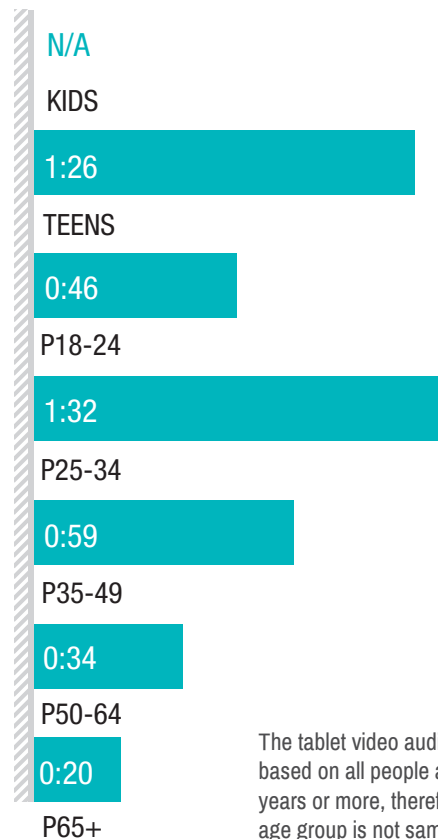
Nielsen's Australian Connected Consumers report states that almost a third (31%) of the total online population claim to have ever used a tablet to access the internet, while 19 percent do so regularly, and at this stage, only 4 percent of the online population claim to use tablets most often to access the internet.

Of the online population that have ever used a tablet to access the internet, 39 percent have claimed to watch online video on tablets, which is the tenth top activity:

TOP TEN ACTIVITIES PERFORMED ON TABLETS:

- 01 Search
- 02 Email
- 03 News
- 04 Weather
- 05 Maps/directions
- 06 Browse others' posts, photos, messages
- 07 Research products/ services
- 08 Update your social networking profile
- 09 Buy items online
- 10 Watch online video

VIDEO AUDIENCE COMPOSITION: TABLET (Q4 2012)



The tablet video audience is based on all people aged 16 years or more, therefore the 'Kids' age group is not sampled.

Source: Nielsen Australian Connected Consumers Report

THE SMARTPHONE SCREEN

Three in five of Australians (61%) use a smartphone, up from 48 percent one year ago.

The use of smartphones for viewing online video is relatively strong in the younger age groups, with the amount of viewing much lower for people 35 years and older.

Nielsen's Australian Connected Consumers report states that more than four in five (81%) smartphone users have ever accessed the internet via their device, while 59 percent do so regularly. It is also the device used most often to access the internet by 10 percent of smartphone users. Just over a third (34%) of people who have ever accessed the internet using a smartphone, have viewed video online.

Overall ownership of mobile phones (regardless of smartphone or otherwise) is at 95 percent (Australians 16+).

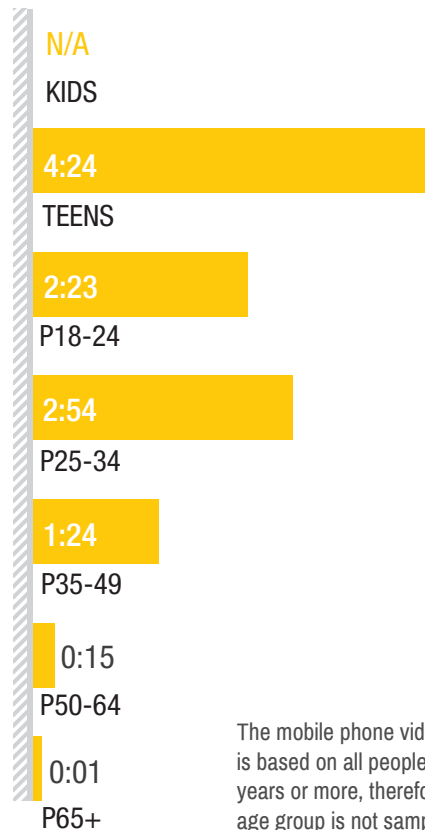
In terms of the online population, 57 percent have ever accessed the internet by mobile phone, 38 percent do so regularly and cite that the mobile phone is the device used most often to access the internet.



TOP TEN ACTIVITIES PERFORMED ON SMARTPHONES:

- 01 Maps/directions/weather
- 02 Email
- 03 Search
- 04 Browse others' posts, photos, messages
- 05 News
- 06 Update your social networking profile
- 07 Travel/transport information
- 08 Banking/bill paying
- 09 Sporting news/info/results
- 10 Watch online video

VIDEO AUDIENCE COMPOSITION: MOBILE (Q4 2012)



The mobile phone video audience is based on all people aged 16 years or more, therefore the 'Kids' age group is not sampled.

Source: Nielsen Australian Connected Consumers Report

KEY OBSERVATIONS

TABLE 1: TECHNOLOGY PENETRATION

	Q1 2012	Q2 2012	Q3 2012	Q4 2012	Q1 2013
Digital terrestrial television (DTT): Penetration within TV households ¹	96%	97%	97%	98%	98%
Completely DTT: Penetration within TV households (Homes capable of receiving DTT on each working TV within the home)	74%	77%	79%	81%	84%
Personal video recorder (PVR): Penetration within TV households	47%	49%	50%	52%	53%
Internet Connection: Household penetration ²	78%	78%	78%	79%	80%
Tablets: Household penetration	15%	19%	22%	27%	31%
Internet Connected TV in Household	15%	16%	18%	20%	21%
Smartphones: People 16+ ³	48%	52%	56%	59%	61%

TABLE 2: MONTHLY TIME SPENT (HH:MM)

	Q1 2012	Q2 2012	Q3 2012	Q4 2012	Q1 2013
Watching TV in the home ⁴	97:15	99:09	99:54	91:05	92:39
Watching Playback TV	6:33	7:13	6:46	6:30	6:48
Using Internet on a PC ⁵	44:06	47:24	48:00	50:42	51:47
Watch video on PC/Laptop	3:15	3:58	3:54	-	-
Watch video on Internet (Video Census) ⁶	-	-	-	5:54	6:43
Watching video on a mobile phone ⁷	N.A.	N.A.	N.A.	1:20	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	0:50	N.A.

¹Source: DTT, PVR estimates are based on install levels from the Combined OzTAM Metro and Regional TAM panels as at last date of each period

²Source: Estimates for Internet connection, Tablet household penetration and Internet connected TV in home from combined OzTAM Metro and Regional TAM quarterly Establishment Surveys (ES). Based on landline CATI ES. Estimate for Internet Connect TV in Home refers to the capability to be internet connected, whether connected or not.

³Source: Nielsen Australian Online Consumer (AOC) Report of online consumers aged 16+ (Q1 2011), The Nielsen Telstra Smartphone Index Report of mobile users aged 16+ Q2 2011 & Q3 2011 and Nielsen Consumer & Media View national population aged 16+ (Q4 2011 onwards)

⁴Source: 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. Please note television viewing is seasonal, with people watching more television in the winter months and with the end of daylight saving time

⁵Source: Nielsen NetView (Q1-Q3 2011) and Nielsen Online Ratings (Q4 2011 onwards). Using Internet on PC excludes adult content and applications. Estimate is the average of the 3 months within the calendar quarter. Figures are National and for people 2+. Home and Work panel only. Due to a change in methodology comparisons prior to Q4 2011 cannot be made.

⁶Source: Nielsen VideoCensus (Q4 2012). Using Internet on PC excludes adult content and applications. Estimate is the average of November and December 2012. 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.

⁷Mobile 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. Watching video on a mobile phone Q4 2011 - 1:20

TABLE 3: OVERALL USAGE (000S), MONTHLY REACH

	Q1 2012	Q2 2012	Q3 2012	Q4 2012	Q1 2013
Watching TV in the home ⁸	21,682	21,683	21,682	21,653	21,651
Watching Playback TV	9,357	9,631	9,706	9,646	9,595
Using Internet on a PC ⁹	13,480	13,116	12,874	14,703	14,908
Watch video on PC/Laptop	10,015	9,897	9,947	-	-
Watch video on Internet (Video Census) ¹⁰	-	-	-	11,103	11,412
Owning/using a mobile phone ¹¹	17,351	17,442	17,445	17,365	17,477
Watching online video on mobile phone ¹²	1,991	N.A.	N.A.	N.A.	2,369
Watching online video on tablet	N.A.	N.A.	N.A.	N.A.	1,185

TABLE 4: A MONTH IN THE LIFE – Q1 2013

	KIDS ¹³	TEENS ¹⁴	P18-24	P25-34	P35-49	P50-64	P65+	ALL PEOPLE ¹⁵
Watching TV in the home ¹⁶	61:37	47:25	44:30	76:50	97:09	125:13	150:25	92:39
Q1 2012	64:54	51:59	51:54	81:49	102:28	129:32	155:41	97:15
Watching Playback TV	3:56	4:11	4:09	6:06	8:41	9:10	8:04	6:48
Q1 2012	3:29	3:56	5:04	6:28	8:21	8:37	7:11	6:33
Using the Internet on a PC ¹⁷	9:27	15:15	45:41	62:02	59:47	60:14	36:44	51:47
Q1 2012	7:30	13:39	29:02	61:00	55:00	53:22	32:04	44:06
Watch video on Internet ¹⁸	4:49	6:56	13:16	8:20	6:14	4:06	1:52	6:43
Watching online video on a mobile phone ¹⁹ (Q4 2012)	N.A.	4:24	2:23	2:54	1:24	0:15	0:01	1:20
Watching online video on a tablet (Q4 2012)	N.A.	1:26	0:46	1:32	0:59	0:34	0:20	0:50

⁸Source: 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).

⁹Source: Nielsen NetView (Q1-Q3'11) and Nielsen Online Ratings (Q4'11 onwards) – Internet activity (using and watching) excludes adult content and application. National figures for people 2+.

¹⁰Source: Nielsen VideoCensus (Q4 2012). Using Internet on PC excludes adult content and applications. Estimate is the average of November and December 2012. 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.

¹¹Mobile phone ownership and usage sourced from Nielsen Consumer & Media View (people aged 14+).

¹²Source: Nielsen Australian Connected Consumers report from 2012-2013 (February 2013 edition) - national figures produced annually citing 16% of the online population aged 16+ for mobile video and 8% for tablet video. Audience figure calculated using national online active audience of 14,808,513 from Nielsen Online Ratings (January 2013).

¹³Combined Metro OzTAM and Regional TAM data defines 'Kids' aged 0-12 and Nielsen Netview aged 2-11.

¹⁴Combined Metro OzTAM and Regional TAM data defines 'Teens' aged 13-17, Nielsen Netview aged 12-17 and Nielsen AOC aged 16-17.

¹⁵Mobile phone population based on people aged 16+.

¹⁶Source: 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).

¹⁷Source: Nielsen NetView (Q1-Q3 2011) and Nielsen Online Ratings (Q4 2011 onwards). Using Internet on PC excludes adult content and applications. Estimate is the average of the 3 months within the calendar quarter. Figures are National and for people 2+. Home and Work panel only. Due to a change in methodology comparisons prior to Q4 2011 cannot be made.

¹⁸Source: Nielsen VideoCensus (Q4 2012). Using Internet on PC excludes adult content and applications. Estimate is the average of November and December 2012. 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.

¹⁹Mobile video source: Nielsen Australian Connected Consumers report for respondents aged 16 years and over. Monthly estimate based on reported weekly time spent multiplied by average number of weeks in a month (4.3).

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

KIDS	Q1 2012	Q2 2012	Q3 2012	Q4 2012	Q1 2013
Watching TV in the home ¹⁶	64:54	68:30	70:10	62:55	61:37
Watching Playback TV	3:29	3:55	4:06	3:55	3:56
Using the Internet on a PC ¹⁷	7:30	7:34	8:12	8:35	9:27
Watching video on PC/Laptop	1:53	2:10	2:19	-	-
Watching video on Internet (VideoCensus) ¹⁸	-	-	-	4:52	4:49
Watching online video on a mobile phone ¹⁹	N.A.	N.A.	N.A.	N.A.	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	N.A.	N.A.

TEENS	Q1 2012	Q2 2012	Q3 2012	Q4 2012	Q1 2013
Watching TV in the home ¹⁶	51:59	55:53	58:21	51:14	47:25
Watching Playback TV	3:56	4:25	4:15	4:22	4:11
Using the Internet on a PC ¹⁷	13:39	13:57	16:42	19:08	15:15
Watching video on PC/Laptop	2:29	3:19	3:12	-	-
Watching video on Internet (VideoCensus) ¹⁸	-	-	-	6:40	6:56
Watching online video on a mobile phone ¹⁹	1:29	1:29	1:29	4:24	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	1:26	N.A.

P18-24	Q1 2012	Q2 2012	Q3 2012	Q4 2012	Q1 2013
Watching TV in the home ¹⁶	51:54	50:53	49:55	44:08	44:30
Watching Playback TV	5:04	4:53	4:22	3:59	4:09
Using the Internet on a PC ¹⁷	29:02	35:45	38:34	41:17	45:41
Watching video on PC/Laptop	3:57	6:25	6:05	-	-
Watching video on Internet (Video Census) ¹⁸	-	-	-	11:36	13:16
Watching online video on a mobile phone ¹⁹	2:54	2:54	2:54	2:23	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	0:46	N.A.

P25-34	Q1 2012	Q2 2012	Q3 2012	Q4 2012	Q1 2013
Watching TV in the home ¹⁶	81:49	84:34	84:25	73:31	76:50
Watching Playback TV	6:28	7:29	6:41	5:59	6:06
Using the Internet on a PC ¹⁷	61:00	60:47	61:18	61:55	62:02
Watching video on PC/Laptop	4:48	5:08	5:10	-	-
Watching video on Internet (Video Census) ¹⁸	-	-	-	8:19	8:20
Watching online video on a mobile phone ¹⁹	2:55	2:55	2:55	2:54	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	1:32	N.A.

P35-49	Q1 2012	Q2 2012	Q3 2012	Q4 2012	Q1 2013
Watching TV in the home ¹⁶	102:28	106:00	107:23	97:19	97:09
Watching Playback TV	8:21	9:15	8:25	8:21	8:41
Using the Internet on a PC ¹⁷	55:00	57:34	56:22	59:23	59:47
Watching video on PC/Laptop	3:31	3:59	3:50	-	-
Watching video on Internet (Video Census) ¹⁸	-	-	-	5:01	6:14
Watching online video on a mobile phone ¹⁹	0:57	0:57	0:57	1:24	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	0:59	N.A.

P50-64	Q1 2012	Q2 2012	Q3 2012	Q4 2012	Q1 2013
Watching TV in the home ¹⁶	129:32	131:36	132:37	121:22	125:13
Watching Playback TV	8:37	9:24	8:44	8:22	9:10
Using the Internet on a PC ¹⁷	53:22	54:34	54:43	59:01	60:14
Watching video on PC/Laptop	3:00	3:19	3:06	-	-
Watching video on Internet (Video Census) ¹⁸	-	-	-	3:21	4:06
Watching online video on a mobile phone ¹⁹	0:18	0:18	0:18	0:15	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	0:34	N.A.

P65+	Q1 2012	Q2 2012	Q3 2012	Q4 2012	Q1 2013
Watching TV in the home ¹⁶	155:41	153:05	152:47	146:36	150:25
Watching Playback TV	7:11	7:51	7:51	7:42	8:04
Using the Internet on a PC ¹⁷	32:04	32:40	33:42	35:50	36:44
Watching video on PC/Laptop	1:25	1:33	1:44	-	-
Watching video on Internet (VideoCensus) ¹⁸	-	-	-	1:48	1:52
Watching online video on a mobile phone ¹⁹	0:00	0:00	0:00	0:01	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	0:20	N.A.

ALL PEOPLE	Q1 2012	Q2 2012	Q3 2012	Q4 2012	Q1 2013
Watching TV in the home ¹⁶	97:15	99:09	99:54	91:05	92:39
Watching Playback TV	6:33	7:13	6:46	6:30	6:48
Using the Internet on a PC ¹⁷	44:06	47:24	48:00	50:42	51:47
Watching video on PC/Laptop	3:15	3:58	3:55	-	-
Watching video on Internet (VideoCensus) ¹⁸	-	-	-	5:54	6:43
Watching online video on a mobile phone ¹⁹	1:20	1:20	1:20	1:20	N.A.
Watching online video on a tablet	N.A.	N.A.	N.A.	0:50	N.A.

TABLE 5: VIDEO AUDIENCE COMPOSITION (BY AGE AND GENDER) – Q1 2013

	KIDS	TEENS	P18-24	P25-34	P35-49	P50-64	P65+	FEMALES	MALES
On Traditional TV ²⁰	11%	3%	5%	12%	22%	25%	23%	53%	47%
Q1 2012	11%	3%	5%	12%	22%	24%	22%	53%	47%
On Internet (VideoCensus) ²¹	3%	6%	15%	18%	28%	20%	11%	51%	49%
On Mobile Phones ²² (Q4 2012)	N.A.	6%	23%	37%	27%	6%	1%	42%	58%
On Tablet (Q4 2012)	N.A.	2%	13%	27%	34%	18%	7%	46%	54%

²⁰ 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).

²¹ Source: Nielsen VideoCensus (Q4 2012). Using Internet on PC excludes adult content and applications. Estimate is the average of November and December 2012. 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.

²² Nielsen Australian Online Consumer (AOC) Report – audience profile is based on all mobile phone users aged 16+ in Australia. National figures only produced annually. Q1-Q3 2011 figures from 2010-2011 AOC Report (February 2011 edition). Q4 2011 figures onwards from 2011-2012 AOC Report (February 2012 edition).

EXPLANATORY NOTES

- Panel install incidence rates for DTT and PVRs 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 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 playback viewing outside of the 7 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 Online Consumer (AOC) report based on online national population aged 16+ and Nielsen Telstra Smartphone Index report based on mobile national population aged 16+.
- Mobile phone ownership and usage sourced from Nielsen Consumer & Media View (people 14+)
- PVR All Households penetration in 'Profiling Tablet and Smartphone Households' table is based on Combined OzTAM Metro and Regional TAM quarterly Establishment Survey (Q3, 2012). 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 Online Consumer report defines 'Teens' as respondents aged 16-17 and 'Male' / 'Female' respondents aged 16+

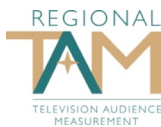
FOR MORE INFORMATION

Should you require more information about any content in this report, please refer to the list below.



DOUG PEIFFER
Chief Executive Officer, OzTAM
doug.peiffer@oztam.com.au

or **MARGARET FEARN**
Principal, Fearnace Media
margaret@fearnacemedia.com



DEBORAH WRIGHT
Chairperson, Regional TAM
dwright@nbntv.com.au



MATT BRUCE
Head of Media Practice Group,
Nielsen
matt.bruce@nielsen.com

JACKIE HELLIKER
Communications Manager,
Nielsen
jackie.helliker@nielsen.com