

# AUSTRALIAN MULTI-SCREEN REPORT

QUARTER 04 2015



**oztam**  
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# Australian viewing trends across multiple screens

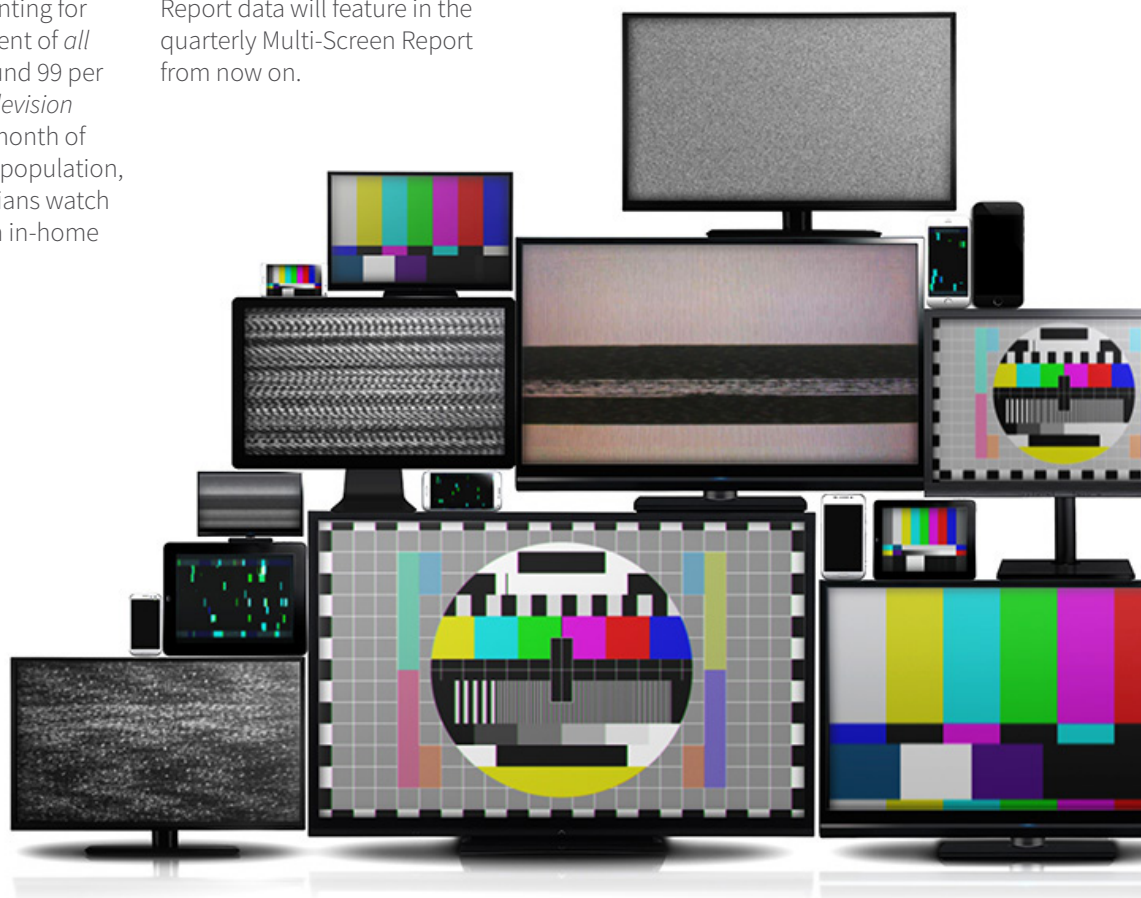
**T**he Q4 2015 Australian Multi-Screen Report provides the latest estimates of screen technologies in Australian homes and the time Australians spend viewing television and other video content on various devices.

Australians are increasingly taking advantage of connected devices to enjoy their favourite TV programs. As seen in earlier editions of the report, unprecedented content and platform choice encourages people to spread their viewing activity.

The TV set remains the primary screen however, accounting for approximately 85 per cent of *all video content*, and around 99 per cent of *all broadcast television material* viewed each month of the quarter. Across the population, 87.4 per cent of Australians watch broadcast television on in-home TV sets each week.

The Q4 2015 Multi-Screen Report includes updated self-reported estimates of the time online Australians spend viewing any video content on connected devices, courtesy of Nielsen's 2016 Australian Connected Consumers Report.

This edition also introduces a new component: OzTAM's Video Player Measurement (VPM) Report. Launched in February 2016, the VPM Report provides a daily summary of the television content Australians are playing on connected devices via broadcaster catch up services. OzTAM VPM Report data will feature in the quarterly Multi-Screen Report from now on.



# Technology in Australian homes

**C**onsumer technologies that a few years ago were novel are now common in Australian homes, with penetration rates slowing accordingly. Also, some households will upgrade to a newer model of device while retaining the older one for secondary use.

Just under half (49 per cent) of households have at least one **tablet**, unchanged on the previous quarter and up from 47 per cent a year ago.

80 per cent of Australians aged 14+ own a **smartphone**, also unchanged quarter-on-quarter though 4 percentage points higher than in Q4 2014.

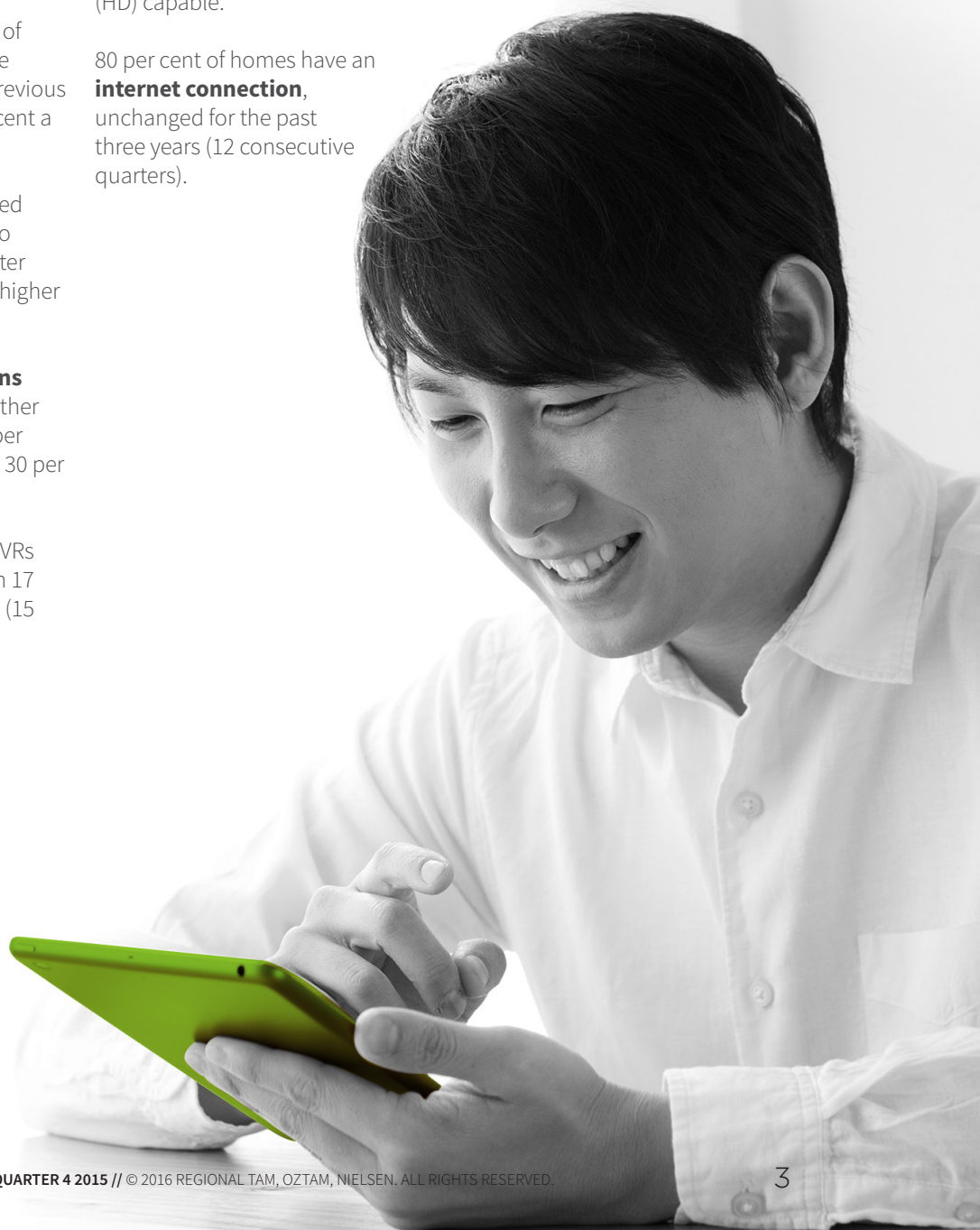
**Internet capable televisions** ('smart' or 'hybrid' TVs), whether connected or not, are in 32 per cent of homes, compared to 30 per cent a year earlier.

58 per cent of homes have PVRs (56 per cent in Q4 2014), with 17 per cent having two or more (15 per cent a year ago).

All Australian television homes receive **digital terrestrial television** (DTT) channels on at least one household TV set, with 97 per cent able to do so on every working TV set.

In 95 per cent of TV homes every working TV set is **high definition** (HD) capable.

80 per cent of homes have an **internet connection**, unchanged for the past three years (12 consecutive quarters).

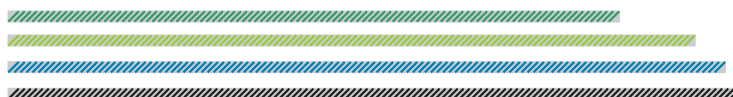




## TECHNOLOGY PENETRATION

Q4 2012 Q4 2013 Q4 2014 Q4 2015

81% 91% 95% 97%



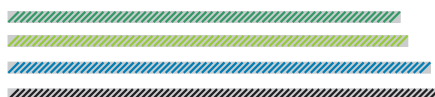
TV HOUSEHOLDS THAT RECEIVE DTT ON **EVERY** WORKING TV SET

75% 87% 92% 95%



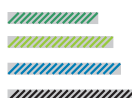
TV HOUSEHOLDS THAT RECEIVE **HD** DTT ON **EVERY** WORKING TV SET

52% 53% 56% 58%



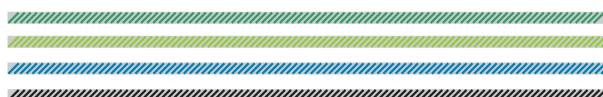
PERSONAL VIDEO RECORDER (PVR): PENETRATION WITHIN TV HOUSEHOLDS

12% 14% 15% 17%



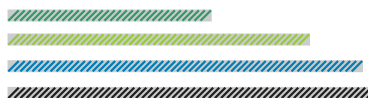
2+ PVR: PENETRATION WITHIN TV HOUSEHOLDS

79% 80% 80% 80%



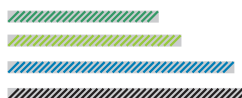
INTERNET CONNECTION: HOUSEHOLD PENETRATION

27% 40% 47% 49%



TABLETS: HOUSEHOLD PENETRATION

20% 23% 30% 32%



INTERNET CAPABLE TV IN HOME

59% 68% 76% 80%



SMARTPHONE: MOBILE PHONE SUBSCRIBERS\*

\* Source: Nielsen Consumer & Media View, national population 16+ Q4 2012 - Q4 2013 and Nielsen Online Ratings Establishment Survey, national population 14+ Q4 2014 - Q4 2015





# Time spent viewing across devices

**A**s seen in previous editions of the Multi-Screen Report, device and platform choice are greatly expanding the opportunities people have to watch video content, and influence the time they spend using various devices.

Across the population as a whole Australians spent 85 hours and 17 minutes (85:17) each month in Q4 2015

watching **broadcast television** (free-to-air and subscription channels) on in-home TV sets. While this is down from 90:27 year-on-year, broadcast reach remains strong: 87.4 per cent of Australians watched broadcast TV on in-home sets each week in Q4 2015, compared to 88.5 per cent a year earlier.

91.4 per cent, or 77:57, of broadcast TV viewed in

the quarter was **live** to air. Broadcast TV played back through the TV set within seven days of original broadcast ('**playback**') was 7:20 (7:21 a year earlier).

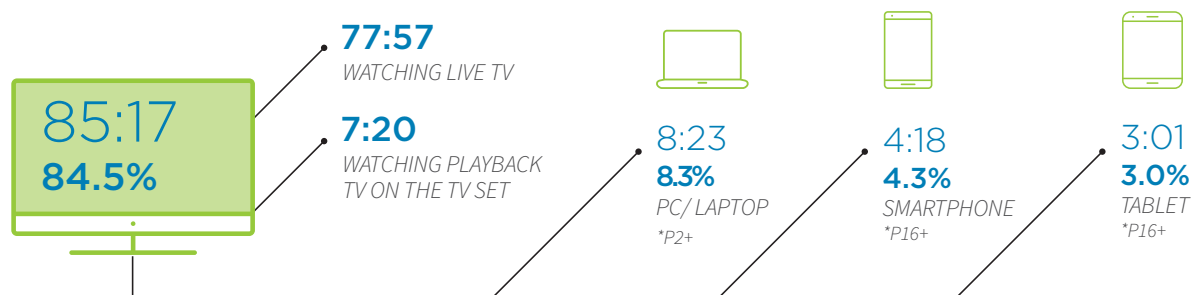
Across all screens and all types of video content – broadcast and non-broadcast – 84.5 per cent of viewing takes place on in-home TV sets.





## VIDEO VIEWING, AVERAGE TIME SPENT PER MONTH

TV // PC // SMARTPHONE // TABLET



The time Australians spend watching video content on computers, tablets and smartphones continues to rise – especially among people under 24. For all age groups however watching broadcast TV on in-home sets still accounts for the largest proportion of viewing time on any single device.

In Q4 2015 Australians aged 2+ spent 8 hours and 23 minutes (8:23) on average each month watching any online video on a **PC or laptop**, up 55 minutes on the same quarter in 2014. This material includes streamed video (such as internet-delivered catch up TV, live streaming and subscription video services) and other content such as YouTube, Vimeo and Facebook.

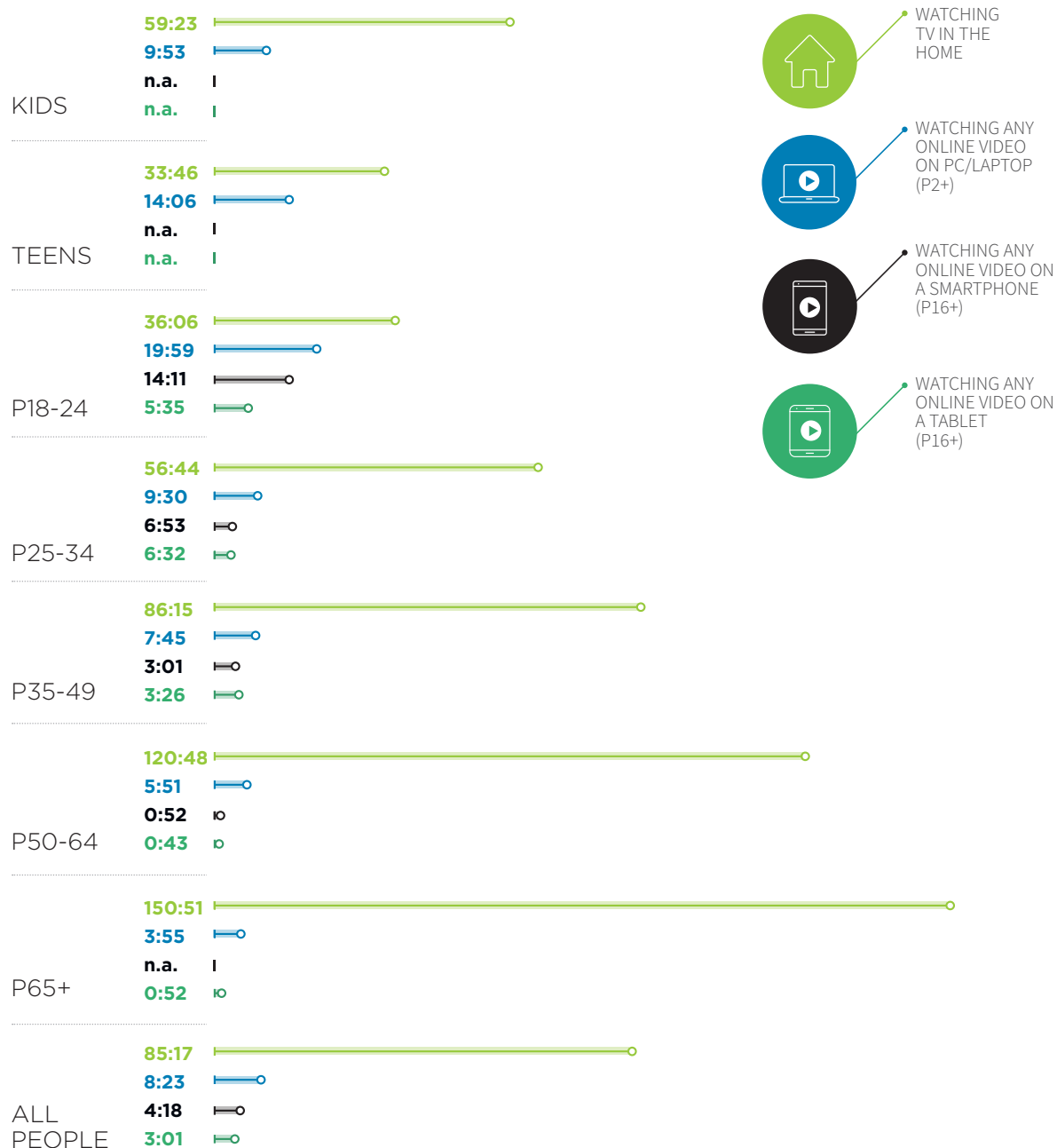
Each month in the quarter Australians aged 2+ spent an average 31:12 online on home and work computers, down 5:56 on Q4 2014 (37:08). This is in part due to people migrating to smartphones and tablets.

Online Australians aged 16+ report spending an average 4:18 each month watching any online video on a **smartphone** (2:47 a year earlier).

Online Australians aged 16+ claim to spend 3:01 each month on average watching any online video on a **tablet** (2:03 in Q4 2014).

# A MONTH IN THE LIFE

TV // PC // LAPTOP // SMARTPHONE // TABLET



Note: Due to low sample size, Teens (aged 16-17 years) and P65+ demographic figures not reported, shown as N.A.

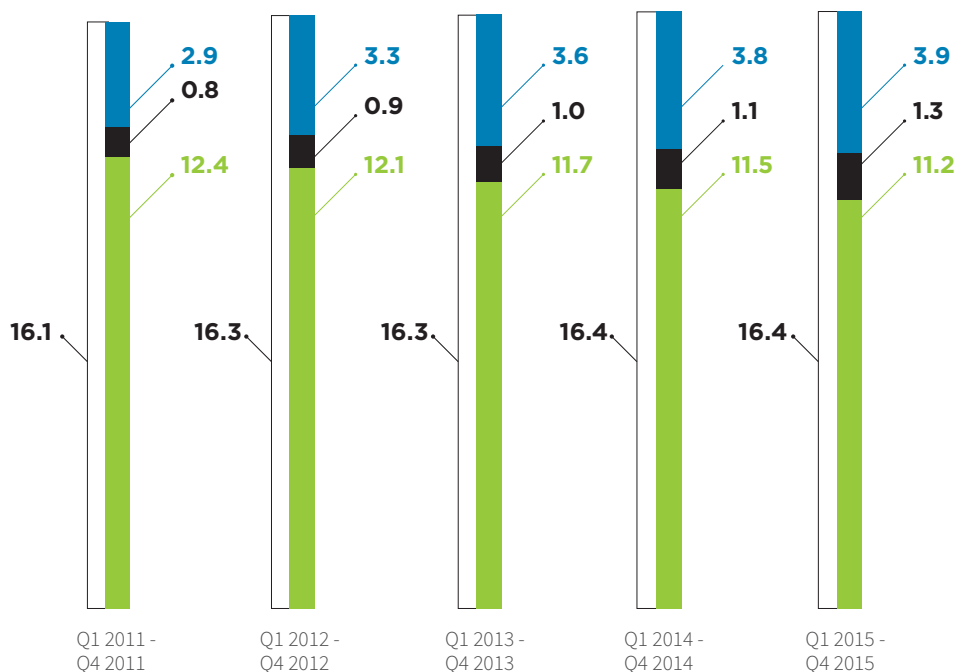


# Total use of the television set

Over the past five years Australians have increased the proportion of time they spend with their TV sets on activities other than watching live and playback television. This **'other screen use'** has risen from 2.9 per cent TARP in 2011 to 3.9 per cent TARP in the most recent four quarters. Accordingly, live + playback TARPs declined from 13.2 per cent TARP five years ago to 12.5 per cent TARP in the rolling four quarters through Q4 2015.

This shift follows take-up of internet capable televisions and devices attached to the TV set which enable a variety of activities, for example: viewing TV network streaming and video player services; watching DVDs; playing back recorded broadcast material beyond the seven-day Consolidated ratings window; internet browsing; streaming music; and accessing over-the-top internet-delivered services.

## TARP % TOTAL PEOPLE



Note: A TARP, or Target Audience Rating Point, is the typical audience at any one period in time expressed as a percentage of the total potential audience. For example, on average at any one minute in the period Q1 2015 - Q4 2015 (far right bar, left) an estimated 16.4 per cent of Australians were using their in-home TV screens.

● LIVE ● PLAYBACK ● OTHER TV SCREEN USE

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





Australians' total use of the TV set – for watching live and playback TV, and for other purposes – was steady in the rolling four quarters to December 2015 compared to the same period a year earlier.

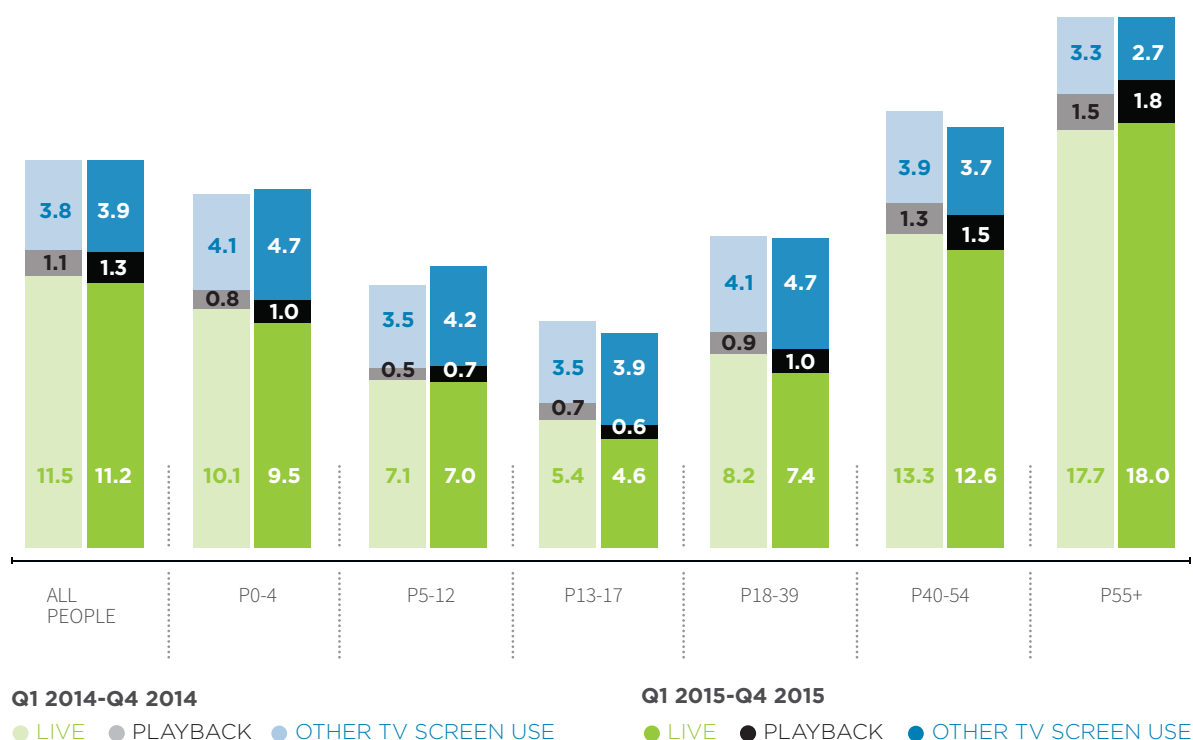
**Live** viewing declined from 11.5 to 11.2 per cent TARP during the four quarters. **Playback** (when people play broadcast material back through their TV set at normal speed within seven days of original broadcast) rose from 1.1 to 1.3 per cent TARP.

**Other TV screen use**, as described above, rose by 0.1 per cent TARP year-on-year to 3.9 per cent TARP.

People under age 40 increased their other screen use compared to the corresponding four quarters a year ago. Those 40+ devoted a slightly lower percentage of their total time with the TV set to such activity.

Compared to other age groups 13-17s spent the greatest proportion of their TV screen time on other use, though live and playback viewing together accounted for more than half of their total.

## TARP % BY DEMOGRAPHIC



# Other television screen use in Q4 2015

Australians increased their other television screen use by 1:34 per month, on average, in Q4 2015 compared to Q4 2014. Total TV screen use fell by 3:12 per month year-on-year, reflecting the decline in broadcast viewing evident in the rolling four quarters through Q4 2015.



	Q4 2014	Q4 2015
<b>WATCHING TV IN THE HOME</b>	<b>90:27</b>	<b>85:17</b>
Watching live TV	83:06	77:57
Watching playback* TV	7:21	7:20

	Q4 2014	Q4 2015
<b>TOTAL TV SCREEN USE</b>	<b>118:00</b>	<b>114:48</b>
Watching live TV	83:06	77:57
Watching playback^ TV	7:45	8:08
Other screen use	27:09	28:43

\* Playback 'what watched' TV || ^ Playback 'when watched' TV

## EXPLAINING WHAT WATCHED AND WHEN WATCHED

'Total TV Screen Use' – as detailed in the monthly time spent table above – does not equal the sum of 'Watching TV in the home' and 'Other screen use' because the playback base is different. 'Total TV screen use' = live + playback when watched (i.e., playback within seven days at the time it is actually viewed) + 'Other screen use'. Watching TV in the home = live + playback of what is watched [i.e., viewing of broadcast content within seven days is attributed back to the time at which the program actually went to air ('Consolidated' viewing).] For example: Program X airs on Sundays at 20.30. A viewer watches this program at midday on Tuesday. In when watched, the playback activity would be at midday on Tuesday. In what watched, the playback viewing would be attributed back to 20.30 on Sunday.



# Introducing OzTAM Video Player Measurement (VPM)

Since its debut four years ago the Australian Multi-Screen Report has examined people's evolving viewing patterns as their options steadily grew beyond linear broadcast schedules and the television screen itself. The media industry has accordingly been seeking to understand how much TV content is now consumed via internet-enabled devices.

In response, OzTAM has introduced its Video Player Measurement (VPM) Report, which provides Australia's first official measure of **viewing of internet-delivered TV content** on devices such as tablets, smartphones, smart TVs,

desktop and laptop computers, and games consoles. The VPM Report captures 'census' level (i.e. all video player activity) data on the devices playing catch up video from participating broadcasters' online services. At launch stage those broadcasters include the metropolitan commercial free-to-air and the national public and subscription television networks.

In Q4 2015 Australians played, on average, 112 million minutes per week of participating broadcasters' content. While this means that VPM content represents about 1 per cent of all broadcast TV viewing in the period, certain online program content can

see relatively higher audience increases. This is similar to the way some broadcast programs attract a sizeable proportion of their total audience from playback (time-shifted) viewing.

This topic will be explored further in the Q1 2016 Australian Multi-Screen Report.



## VIDEO PLAYER MEASUREMENT



OzTAM only detects content played from a broadcaster's online video service and at no point monitors anything other than when a device is accessing a broadcaster's app or browser-based video service. OzTAM is not able to identify the user of the device.



# Understanding the difference:

## TAM, VPM, Nielsen Online Ratings (Hybrid Streaming) and Australian Connected Consumers Report (ACCR) data

**T**he Multi-Screen Report draws on OzTAM and Regional TAM's in-home television audience measurement (TAM) panels to estimate the time Australians across age groups spend viewing broadcast television (free-to-air and subscription channels) on in-home TV sets each month. These panels comprise 5,600 homes, and in excess of 13,000 people, that collectively represent the characteristics of the overall population.

OzTAM's VPM service is 'census', rather than panel, based. This means whenever a person plays content on

a connected device using a broadcaster's video player, OzTAM captures it – whatever those devices are and wherever they are located.

Hybrid streaming, from which 'watching video on the internet' figures are derived, is sourced from the Nielsen Online Ratings panel. Online video is measured using both tagged and metered panel based data from home and work panels. This hybrid methodology enables the extrapolation of total market metrics.

Nielsen's Australian Connected Consumers Report surveys

a national representative sample of approximately 5,000 online Australians aged 16+ and quantifies how Australians behave online, and places their online behaviours in context against other media use – including all video (broadcast and non-broadcast). All ACCR figures are self-reported.

	TAM	VPM	Hybrid Streaming	ACCR
<b>How measured</b>	Technology	Technology	Technology	Claimed behaviour
<b>Who measured</b>	Representative sample of homes / individual people	All devices playing participating broadcasters' online content	Tagged data and metered panel data	Survey of online Australians 16+
<b>Scope</b>	Broadcast TV: live + playback through TV set within seven days	Online broadcast TV viewed on a connected device	All online video: broadcast and non-broadcast	All online video: broadcast and non-broadcast



## KEY OBSERVATIONS

TABLE 01 <b>TECHNOLOGY PENETRATION</b>	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015
<b>COMPLETELY DTT:</b> Penetration within TV households (Homes capable of receiving DTT on <b>each</b> working TV within the home)	95%	96%	96%	97%	97%
<b>HD TV:</b> Penetration within TV households (Homes capable of receiving HD DTT on <b>each</b> working TV within the home)	92%	93%	94%	95%	95%
<b>PERSONAL VIDEO RECORDER (PVR):</b> Penetration within TV households	56%	56%	57%	57%	58%
<b>2+PVR:</b> Penetration within TV households	15%	15%	16%	16%	17%
<b>INTERNET CONNECTION:</b> Household penetration <sup>1</sup>	80%	80%	80%	80%	80%
<b>TABLETS:</b> Household penetration	47%	47%	47%	49%	49%
<b>INTERNET CAPABLE TV IN HOME</b> (Whether connected or not)	30%	30%	30%	31%	32%
<b>SMARTPHONES:</b> People 14+ <sup>2</sup>	76%	76%	79%	80%	80%

TABLE 02 <b>MONTHLY TIME SPENT</b> (HH:MM)	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015
Watching TV in the home <sup>3</sup>	90:27	89:28	90:53	90:42	85:17
Watching Playback TV	7:21	7:31	8:11	7:45	7:20
Online time spent per person <sup>4</sup>	37:08	35:51	37:31	34:44	31:12
Watch video on Internet <sup>5</sup>	7:28	6:57	7:32	7:48	8:23
Watching online video on a smartphone <sup>6</sup>	2:47	N.A.	N.A.	N.A.	4:18
Watching online video on a tablet <sup>6</sup>	2:03	N.A.	N.A.	N.A.	3:01

<sup>1</sup>Source: Estimates for internet connection, tablet household penetration and Internet capable TV in home from combined OzTAM Metro and Regional TAM quarterly Establishment Surveys (ES). Based on mobile and landline CATI ES. Estimate for internet capable TV in home refers to the capability to be internet connected, whether connected or not.

<sup>2</sup>Source: Nielsen Online Ratings Establishment Survey, national population 14+, Q4 2014 – Q4 2015

<sup>3</sup>Source: Combined OzTAM Metro and Regional TAM databases with overlap homes de-duplicated. Average time spent viewing (ATV 0200-2600). 'Watching TV' and 'Watching Playback TV' are both based on Consolidated data. Playback viewing is up to 7 days after broadcast. Includes free-to-air and subscription television viewing.

<sup>4</sup>Source: Nielsen Online Ratings – Hybrid Surfing. Estimate is the average of the 3 months within the calendar quarter. Figures include all online activities inclusive of PC applications such as iTunes, Skype etc.

<sup>5</sup>Source: Nielsen Online Ratings – Hybrid Streaming. Figures are national and for People 2+. Home and Work panel only. Due to a change in methodology comparisons prior to Q4 2012 cannot be made.

<sup>6</sup>Smartphone and tablet video source: Nielsen Australian Connected Consumer report for respondents aged 16 years and over (inclusive of total online population regardless of device ownership or video consumption). Monthly estimate based on reported weekly time spent multiplied by average number of weeks in a month. Figure relates to online video only.





TABLE 03

OVERALL USE (000S), MONTHLY REACH	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015
Watching TV in the home <sup>7</sup>	21,813	22,158	22,193	22,175	22,154
Watching Playback TV	11,469	11,769	12,226	12,103	12,343
Online unique audience <sup>8</sup>	17,704	18,001	18,117	18,392	18,409
Watch video on Internet <sup>9</sup>	13,288	13,343	13,711	13,352	13,017
Owning/using a smartphone <sup>10</sup>	14,546	14,662	15,406	15,639	15,647
Watching online video on smartphone <sup>11</sup>	3,470	N.A.	N.A.	N.A.	4,065
Watching online video on tablet <sup>11</sup>	2,479	N.A.	N.A.	N.A.	2,710

TABLE 04

A MONTH IN THE LIFE - Q4 2015	KIDS <sup>12</sup>	TEENS <sup>13</sup>	P18-24	P25-34	P35-49	P50-64	P65+	ALL PEOPLE
Watching TV in the home <sup>7</sup> Q4 2014	59:23 63:58	33:46 43:07	36:06 40:02	56:44 68:21	86:15 93:53	120:48 124:59	150:51 148:03	85:17 90:27
Watching Playback TV Q4 2014	4:35 4:34	3:03 4:34	3:44 4:12	5:36 6:08	8:46 8:43	9:44 9:41	11:18 10:10	7:20 7:21
Online time spent per person <sup>8</sup>	4:47	8:45	25:41	35:16	34:27	38:01	27:46	31:12
Watch video on Internet <sup>9</sup>	9:53	14:06	19:59	9:30	7:45	5:51	3:55	8:23
Watching online video on a smartphone <sup>14</sup>	N.A.	N.A.	14:11	6:53	3:01	0:52	N.A.	4:18
Watching online video on tablet <sup>14</sup>	N.A.	N.A.	5:35	6:32	3:26	0:43	0:52	3:01

<sup>7</sup> Source: Combined OzTAM Metro and Regional TAM databases with overlap homes de-duplicated. 'Watching TV' and 'Watching Playback TV' are both based on consolidated data (0200-2600). Playback viewing is up to 7 days after broadcast.

<sup>8</sup> Source: Nielsen Online Ratings – Hybrid Surfing. Estimate is the average of the 3 months within the calendar quarter. Figure includes all online activities inclusive of PC applications such as iTunes, Skype etc.

<sup>9</sup> Source: Nielsen Online Ratings – Hybrid Streaming. Figures are national and for People 2+. Home and Work panel only. Due to a change in methodology comparisons prior to Q4 2012 cannot be made.

<sup>10</sup> Nielsen Online Ratings Establishment Survey, national population 14+, Q4 2014 – Q4 2015.

<sup>11</sup> Nielsen Australian Connected Consumers report from 2015-2016 (March 2016 edition) - national figures produced annually citing 24% of the online population aged 16+ for mobile video and 16% for tablet video. Audience figure calculated using national online active audience of 16,939,000 from Nielsen Online Ratings (December 2015).

<sup>12</sup> Combined Metro OzTAM and Regional TAM data defines 'Kids' aged 0-12 and Nielsen Netview aged 2-11.

<sup>13</sup> Combined Metro OzTAM and Regional TAM data defines 'Teens' aged 13-17, Nielsen Netview aged 12-17 and Nielsen ACC aged 16-17.

<sup>14</sup> Smartphone and tablet video source: Nielsen Australian Connected Consumers Report March 2016. Online 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. Figure relates to online video only. Note: Due to low sample size, Teens demographic (aged 16-17 years) and people 65+ figures not reported, shown as N.A.



TABLE 04A A MONTH IN THE LIFE - BY QUARTER

KIDS <sup>12</sup>	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015
Watching TV in the home <sup>7</sup>	63:58	62:58	64:25	64:58	59:23
Watching Playback TV	4:34	4:38	4:58	4:56	4:35
Online time spent per person <sup>8</sup>	4:52	4:40	5:42	5:12	4:47
Watch video on Internet <sup>9</sup>	5:47	8:08	7:54	6:33	9:53

TEENS <sup>13</sup>	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015
Watching TV in the home <sup>7</sup>	43:07	37:55	38:31	38:22	33:46
Watching Playback TV	4:34	3:57	3:51	3:23	3:03
Online time spent per person <sup>8</sup>	12:51	10:39	7:57	8:29	8:45
Watch video on Internet <sup>9</sup>	7:02	6:07	3:39	8:06	14:06
Watching online video on smartphone <sup>14</sup>	14:08	N.A.	N.A.	N.A.	N.A.
Watching online video on tablet <sup>14</sup>	7:28	N.A.	N.A.	N.A.	N.A.

P18-24	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015
Watching TV in the home <sup>7</sup>	40:02	40:03	41:34	39:24	36:06
Watching Playback TV	4:12	4:37	4:52	4:14	3:44
Online time spent per person <sup>8</sup>	34:14	30:26	35:08	29:55	25:41
Watch video on Internet <sup>9</sup>	10:56	11:11	14:58	15:15	19:59
Watching online video on smartphone <sup>14</sup>	8:30	N.A.	N.A.	N.A.	14:11
Watching online video on tablet <sup>14</sup>	3:13	N.A.	N.A.	N.A.	5:35

P25-34	Q4 2014	Q1 2014	Q2 2015	Q3 2015	Q4 2015
Watching TV in the home <sup>7</sup>	68:21	66:36	65:52	61:31	56:44
Watching Playback TV	6:08	5:59	6:43	5:56	5:36
Online time spent per person <sup>8</sup>	41:07	39:22	39:30	37:24	35:16
Watch video on Internet <sup>9</sup>	9:41	9:00	7:37	9:07	9:30
Watching online video on smartphone <sup>14</sup>	4:36	N.A.	N.A.	N.A.	6:53
Watching online video on tablet <sup>14</sup>	4:10	N.A.	N.A.	N.A.	6:32



TABLE 04A A MONTH IN THE LIFE - BY QUARTER

<b>P35-49</b>	<b>Q4 2014</b>	<b>Q1 2015</b>	<b>Q2 2015</b>	<b>Q3 2015</b>	<b>Q4 2015</b>
Watching TV in the home <sup>7</sup>	93:53	91:53	92:54	93:12	86:15
Watching Playback TV	8:43	9:04	9:42	9:01	8:46
Online time spent per person <sup>8</sup>	39:28	40:21	41:37	39:40	34:27
Watch video on Internet <sup>9</sup>	6:39	6:32	7:34	8:09	7:45
Watching online video on smartphone <sup>14</sup>	1:53	N.A.	N.A.	N.A.	3:01
Watching online video on tablet <sup>14</sup>	1:50	N.A.	N.A.	N.A.	3:26

<b>P50-64</b>	<b>Q4 2014</b>	<b>Q1 2015</b>	<b>Q2 2015</b>	<b>Q3 2015</b>	<b>Q4 2015</b>
Watching TV in the home <sup>7</sup>	124:59	122:55	126:13	126:51	120:48
Watching Playback TV	9:41	9:52	10:49	10:33	9:44
Online time spent per person <sup>8</sup>	45:47	44:08	46:59	42:29	38:01
Watch video on Internet <sup>9</sup>	7:21	6:08	7:06	5:45	5:51
Watching online video on smartphone <sup>14</sup>	0:23	N.A.	N.A.	N.A.	0:52
Watching online video on tablet <sup>14</sup>	0:46	N.A.	N.A.	N.A.	0:43

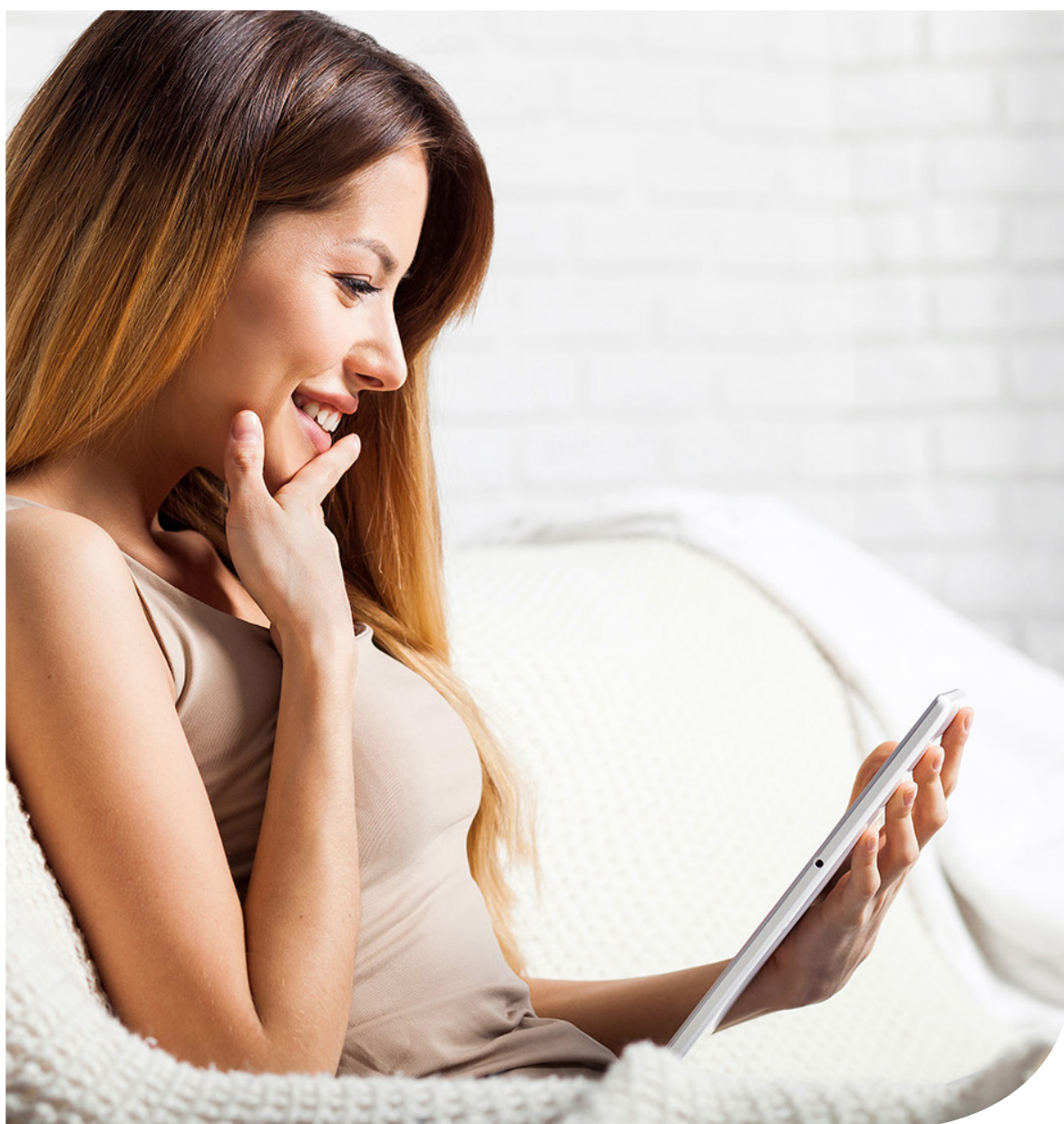
<b>P65+</b>	<b>Q4 2014</b>	<b>Q1 2015</b>	<b>Q2 2015</b>	<b>Q3 2015</b>	<b>Q4 2015</b>
Watching TV in the home <sup>7</sup>	148:03	150:33	152:36	155:33	150:51
Watching Playback TV	10:10	10:33	11:53	11:36	11:18
Online time spent per person <sup>8</sup>	30:22	27:05	28:43	28:35	27:46
Watch video on Internet <sup>9</sup>	3:54	3:13	3:35	4:31	3:55
Watching online video on smartphone <sup>14</sup>	0:05	N.A.	N.A.	N.A.	N.A.
Watching online video on tablet <sup>14</sup>	0:30	N.A.	N.A.	N.A.	0:52

<b>ALL PEOPLE</b>	<b>Q1 2014</b>	<b>Q1 2015</b>	<b>Q2 2015</b>	<b>Q3 2015</b>	<b>Q4 2015</b>
Watching TV in the home <sup>7</sup>	90:27	89:28	90:53	90:42	85:17
Watching Playback TV	7:21	7:31	8:11	7:45	7:20
Online time spent per person <sup>8</sup>	37:08	35:51	37:31	34:44	31:12
Watch video on Internet <sup>9</sup>	7:28	6:57	7:32	7:48	8:23
Watching online video on smartphone <sup>14</sup>	2:47	N.A.	N.A.	N.A.	4:18
Watching online video on tablet <sup>14</sup>	2:03	N.A.	N.A.	N.A.	3:01



TABLE 05 VIDEO AUDIENCE COMPOSITION (BY AGE AND GENDER)

Q4 2015	KIDS	TEENS	P18-24	P25-34	P35-49	P50-64	P65+	FEMALES	MALES
On Traditional TV <sup>7</sup> Q4 2014	11% 12%	2% 3%	4% 4%	10% 11%	20% 21%	26% 25%	26% 24%	53% 53%	47% 47%
On Internet <sup>9</sup> Q4 2014	4% 3%	4% 4%	8% 10%	16% 19%	30% 29%	25% 23%	13% 12%	52% 49%	48% 51%



# Explanatory Notes

- Panel install incidence rates for DTT and PVR are based on combined OzTAM Metro and Regional TAM panels as at last date of each period (Q1=end of P4, Q2=end of P7, Q3=end of P10, Q4=end of P13).
- Quarterly Establishment Survey waves are conducted within standard calendar quarters.
- National Establishment Survey (ES) estimates are based on combined OzTAM Metro and Regional TAM quarterly waves. Quarterly ES waves are conducted within standard calendar quarters.
- Playback mode is defined as television broadcast content recorded and viewed (played back) at normal speed through the TV set within seven days of the original broadcast time.
- Other Screen Use is TV screen use that excludes live and playback viewing of broadcast television within seven days of the original broadcast time. It can include non-broadcast activities such as gaming, online activity on the TV screen and playing back recorded TV content outside of the seven-day consolidation window.
- Please note 'Total TV screen use' does not equal the sum of 'Watching TV in the home' and 'Total other screen use' because the playback base is different. 'Total TV screen use' = live + **playback when watched** (i.e., playback within seven days at the time it is actually viewed) + 'Total other screen use'. Watching TV in the home = live + **playback of what is watched** (viewing of broadcast content within seven days is attributed back to the time at which the program actually went to air: in other words Consolidated viewing).
- 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 Connected Consumers Report March 2016 (ACC) based on online national population aged 16+.
- Smartphone ownership and usage sourced from Nielsen Online Ratings Establishment Survey (people 14+)
- PVR penetration within TV households in Table 1 is based on install levels from the Combined OzTAM Metro and Regional TAM panels as at the last date of each period.
- TAM data defines 'Kids' as panel members aged 0-12, 'Teens' aged 13-17 and 'Male' / 'Female' as total individuals aged 0+.
- Nielsen Netview defines 'Kids' as panel members aged 2-11, 'Teens' aged 12-17 and 'Male' / 'Female' as individuals aged 2+.
- Nielsen Australian Connected Consumers report defines 'Teens' as respondents aged 16-17 and 'Male' / 'Female' respondents aged 16+.
- OzTAM's VPM Report captures minute-by-minute viewing of participating broadcasters' online 'catch up TV' content played to connected devices such as tablets, smartphones, smart TVs, games consoles and PCs/laptops.
- Nielsen has implemented page crediting improvements in the measurement of web pages and time spent across all online activities, driving a trend break for May 2013 data onwards for time spent online. As part of these improvements, the previous metric of 'PC time spent' has been retired and replaced with the new metric of 'online time spent'. Online time spent is inclusive of all online activities including PC applications (e.g. iTunes, Skype, etc).
- March 2014 constituted a trend break for all key audience metrics from Nielsen Online Ratings - Hybrid. Nielsen, guided by its collaboration with IAB Australia's Measurement Council, transitioned to a new data processing platform and implemented a tightening of panel rules for online audience measurement. These new rules resulted in the removal of 'inactive' panelists and this has reset and stabilised the online universe metric which is so critical to how we ensure accurate measurement of Australian internet consumption.





# For more information



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