

NEW DEVICES ADD TO TV VIEWING TIME: Q2 2013 MULTI-SCREEN REPORT

15 October, 2013

The latest **Australian Multi-Screen Report**, covering the second quarter of calendar 2013, shows Australians are progressively adopting new screen technologies, creating new options to view broadcast television and other video.

Broadcast TV viewing is stable; total television screen use grows

Australians continue to spend the vast majority of their screen time with the in-home TV set.

People watch an average 96 hours and 37 minutes (96:37) of **broadcast TV** per month¹. 92% of TV viewing is Live, with Playback viewing within seven days of broadcast at 7:46.

Playback viewing and Other Screen Usage (which includes using the TV for gaming, online activities, and Playback beyond seven days of broadcast) continue to rise.

This means people are spending more time overall with their TV screens, reflecting the progressive take-up of internet connected TVs, now in 22% of homes (16% in Q2 2012), and increasing variety of devices attached to the main TV set, such as games consoles, 'over-the-top' television services and PVRs (now in 54% of homes).

Similar to Live viewing patterns, the 'shape of the day' for Playback and Other Screen Usage builds steadily through the day and peaks in the evening prime time period.

99% of homes have now converted to digital terrestrial television (DTT) and 88% have converted every working TV in the home to DTT.

New in-home technologies and evolving viewing habits

An estimated 33% of homes now have **tablets**, up from 19% in Q2 2012. Across the online population aged 16+, people claim to spend an average 50 minutes per month² using tablets to watch any online video, which can include both broadcast TV and non-broadcast content.

Australians report spending an average 1:20 per month watching any online video on **smartphones**.³

Australians watch an average of 6:26 per month of any internet video via **PCs/laptops** (both television broadcast and non-broadcast content)⁴.

¹ All people. 2am-2am. Includes television watched on TV sets only and **does not include viewing that may be going to tablets**. TV viewing is seasonal: time spent rises in winter months and dips in summer.

² Q4 2012. Nielsen Australian Connected Consumers Report 2012.

³ Q4 2012. Nielsen Australian Connected Consumers Report 2012.

⁴ Nielsen VideoCensus.

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



Erica Boyd, Senior Vice President, Cross-Platform, Nielsen, SEANAP, said: “The latest Multi-Screen Report underscores Australians’ seemingly endless demand for compelling content. Not only do we watch more than three hours of ‘traditional’ TV a day – a level that hasn’t changed over the past five years – but internet-enabled TVs and mobile devices provide more opportunity to consume TV and other video content than ever before. Nielsen, OzTAM and Regional TAM will continue to track Australians’ evolving viewing habits to provide an even better picture of how Australians engage with various screens.”

Key findings as of Q2 (April-June) 2013:

- Australians watch on average 96 hours and 37 minutes (96:37) of broadcast TV on traditional television sets per month⁵.
- 92% of all TV viewing is Live, with Playback accounting for 8% (7:46 per month).
- 99% of homes have converted to digital terrestrial television (DTT), with 88% having converted every working set in the home to DTT.
- 54% of homes have PVRs (49% in Q2 2012).
- Household internet penetration is stable at 80%.
- Australians spend on average 38:41 per month online⁶.
- Internet-connected TVs are in 22% of homes (16% in Q2 2012).
- 33% of homes have tablets (19% in Q2 2012).

Across the online population aged 16+, people spend an average 50 minutes per month⁷ using tablets to watch any online video, which can include both broadcast TV and non-broadcast content.

⁵ All people figures. 2am-2am.

⁶ Nielsen Online Ratings. Ppl 2+.

- 65% of Australians aged 16+ own a smartphone (52% in Q2 2012) and spend on average 1:20 per month⁸ viewing any video on these devices (1:20 a year earlier).
- 12.06 million Australians watch some video (both television broadcast and non-broadcast content) on the internet each month: an average of 6:26 per month. Such viewing is highest among people aged 18-24 (13:01)⁹.
- 92% of *all* video viewing¹⁰ – including broadcast and non-broadcast video – is on the traditional TV set, with other devices accounting for 8%¹¹:
 - 96:37 per month on the TV set
 - 6:26 per month online via PCs/laptops
 - 1:20 per month on smartphones
 - 50 minutes per month on tablets

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Sources: Nielsen, OzTAM, Regional TAM

Further detail is provided in the report, available upon request. Please contact:

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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 and Consumer & Media View database.

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

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

⁷ Q4 2012.

⁸ Q4 2012.

⁹ Nielsen VideoCensus.

¹⁰ 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.

¹¹ TV viewing: All People, Q2 2013, 2am-2am. Other devices: Ppl 16+ smartphones/tablets, Q4 2012; Internet: Ppl 2+, Q2 2013, Nielsen Online Ratings.

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>