

TV THE HUB OF AUSTRALIANS' SCREEN ACTIVITY

- Internet-connected TVs, now in 18% of homes, add to time spent with the screen
- Viewing of broadcast TV is strong and stable: average 100 hours/month
- 93 % of all TV viewing is live; nearly 7 hours/month played back

6 December, 2012

The television set remains the hub of Australians' screen activity according to the latest **Australian Multi-Screen Report** covering the third quarter of calendar 2012.

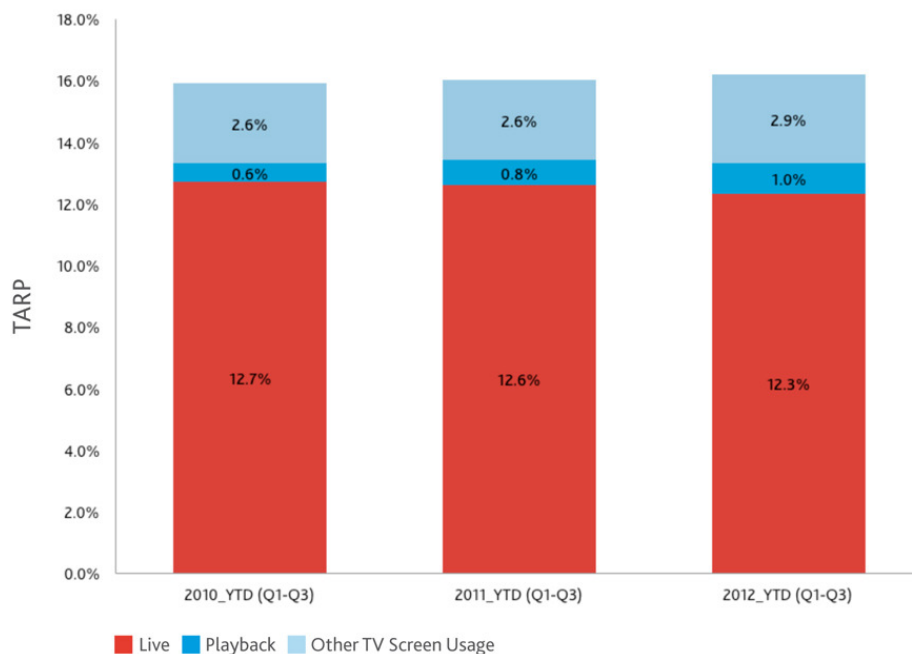
People now spend approximately 100 hours each month watching broadcast television on the traditional set, with playback viewing accounting for nearly 7 hours and internet-connected TVs, now in 18% of homes, adding to time spent with the screen.

Over the past three years, overall use of the traditional television screen has grown.

While viewing of live TV broadcasts has declined slightly, playback viewing continues to rise, keeping broadcast TV viewing as a whole steady.

Meanwhile people increasingly use their TV screen for other purposes – for example, non-broadcast activities (gaming, viewing DVDs), online browsing or playback beyond the 7-day Consolidated viewing window, as illustrated below:

TARP - TOTAL INDIVIDUALS



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

Note: A Target Audience Ratings Point, or 'TARP', is the typical audience (expressed as a percentage of a target demographic) at any one minute. For example, in 2012 to date (far right bar in the chart above) at any one minute in the day, on average, an estimated 12.3% of the overall population in OzTAM and Regional TAM markets are watching Live TV; 1% are watching Playback TV; 2.9% are using their TV screens for other purposes.

'Other screen usage' now accounts for 18.1% of total TV screen time, rising slightly in each of the past three years (up 0.3 TARPs since Q3 2011).

The top online activities conducted via internet TVs are watching online videos and accessing news (equally popular) followed by accessing weather information and sport news, information and results.¹

Key findings as of Q3 (July-September) 2012:

- 95% of all viewing is to the traditional television set², on average 99 hours and 54 minutes (99:54) per month³.
- 50% of homes have a PVR.
- 93% of all TV viewing is live, with playback accounting for 7% (6:46 per month in Q3 2012; 6:09 in Q3 2011).
- 18% of homes have at least one internet-connected TV.
- 22% of homes have at least one tablet device (19% in Q2 2012).
- Viewing video on tablets is in its infancy but growing: by Q4 2011, 5% of the total online population used tablets to watch any video (both broadcast and non-broadcast) (2% in Q4 2010).⁴
- 45% of Australians watch some video (broadcast and non-broadcast content) online via a PC or laptop each month, on average 3:54 (3:03 in Q3 2011).
- 56% of Australians aged 16+ own a smartphone and spend on average 1:20 per month viewing any video on these devices⁵.
- Tablets and smartphones are more prevalent in households with children under 18 years of age. These households are also more likely to have a PVR, internet-connected TV, games machine, laptop or desktop PC.

"We continue to see that as Australians gain access to now four key screens across TV, PC, tablet and mobile they consume more video, continuing a long term trend of Australians being some of the most enthusiastic consumers of media in the world," said **Matt Bruce, Managing Director of Nielsen's Media Group**.

Doug Peiffer, CEO, OzTAM, said: "The prevalence of new technologies – PVRs, internet-connected TVs, digital terrestrial television, smartphones and tablets – gives viewers greater choice in where, when and how much television they view. The insights provided by the Australian Multi-Screen report give the industry greater clarity on evolving TV consumption habits; it shows the hub of consumers' screen activity remains the television set, with people adding to their viewing with new devices."

¹ Nielsen Australian Online Consumer Report 2011.

² Viewing via the conventional TV includes broadcast content only; video viewing on second and third screens can include both broadcast and non-broadcast video content.

³ All people figures.

⁴ Nielsen Australian Online Consumer Report. Q4 2011.

⁵ Q4 2011.

Additional detail on take-up on new technologies and viewing patterns:

- TV viewing is robust and stable (97:15 in Q1 2012; 99:09 in Q2 2012; 99:54 in Q3 2012)⁶.
- 97% of homes can receive digital free-to-air television (DTT) (94% in Q3 2011)
- 79% have now converted every working television set in the home to DTT (65% in Q3 2011).
- 50% of homes have a PVR (42% in Q3 2011).
- Australians spend on average 48 hours per month using the internet on a PC.
- Household internet penetration is stable at 78%.
- 60% of online Australians aged 16+ use their TV screens and computer screens simultaneously (multi-task) at least some of the time. Of these multi-taskers, 36% are doing so on a daily basis.⁷

People continue to prefer to watch on the largest screen available:

- 95% of *all* video viewing – both broadcast and non-broadcast – still goes to the traditional TV set.
- The combination of the extended screens (PC and mobile phone usage) for *any* video content still accounts for just 5% of the video consumption on traditional TV sets:
 - 3 hours 54 minutes (3:54) per month on PCs (All People)
 - 1:20 per month on mobiles (people aged 16+; Q4 2011)
 - 99:54 per month on a traditional TV (All People)

-ends-

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

⁶ All people figures; TV viewing behaviour fluctuates seasonally, with viewing increasing in winter time.

⁷ Nielsen Australian Online Consumer Report 2011.

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

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>