

AUSTRALIAN MULTI-SCREEN REPORT

QUARTER 2
2014



TV AND OTHER VIDEO CONTENT ACROSS MULTIPLE SCREENS

This edition of the Australian Multi-Screen Report (Q2 2014) updates the take-up rates of internet-connected devices in Australian homes as well as the time Australians spend viewing broadcast television on in-home television sets, and TV and other video content on home computers.



SNAPSHOT OF TV VIEWING AND TECHNOLOGY PENETRATION IN AUSTRALIAN HOMES: Q2 2014

Across the population, Australians continue to watch, on average, a little over three hours of broadcast television each day on their in-home TV sets. This figure has been consistent over the past decade.

In the second quarter of 2014 Australians watched an average of 97 hours and 3 minutes per month (97:03) of broadcast television (both free-to-air and subscription channels) on their in-home TV sets – a rise of 26 minutes per month compared to the second quarter of 2013.

91.8 per cent of all in-home TV viewing in the quarter was live (i.e., as the program actually went to air) and 8.2 per cent was viewed in playback – that is, when viewers watch broadcast TV material they have recorded within seven days of original broadcast time using a device such as a PVR or DVR.

55 per cent of Australian homes have at least one PVR and 14 per cent have two or more. On average, Australians devoted

an average of 7 hours 58 minutes per month in the quarter to playback viewing (7:46 a year ago).

Four in five Australian homes (80 per cent) have an internet connection and that figure has been steady for the past five quarters.

During Q2 2014 Australians aged 2+ spent an average of 39 hours and 27 minutes (39:27) online on home and work computers. Their viewing of any online video on computers (including broadcast TV content as well as other video material) increased to an average of 8 hours and 8 minutes per month (6:26 a year ago).

Tablets are now in 42 per cent of homes – steady on Q1 2014 and up from up from 33 per cent in the second quarter of 2013. Across the Australian online population aged 16+ people claim to spend 1:47 per month watching any online video on a tablet¹.

71 per cent of Australians aged 16+ own a smartphone, compared to 65 per cent in Q2 2013. Across the Australian online population aged 16+, people report spending 1:56 per month watching any online video on a smartphone².

Televisions with the capability to connect to the internet (e.g., internet-capable 'smart' or 'hybrid' TVs, whether actually connected or not) are now in 27 per cent of homes, steady on Q1 2014 and up from 22 per cent a year ago.

Following the switch-off of analogue free-to air television broadcasts, since the start of calendar 2014 free-to-air TV channels have been delivered digitally to all Australian television homes. Most homes (94 per cent) can receive digital terrestrial television (DTT) on every working TV set in the home. 6 per cent have secondary televisions in the home which although unable to receive digital free-to-air channels may be used for non-broadcast purposes such as gaming, playing DVDs or as a computer monitor.



¹ Tablet viewing figures are for Q4 2013 from the ACC report.

² Smartphone viewing figures are for Q4 2013 from the ACC report.

TECHNOLOGY PENETRATION

Q2 2013 Q2 2014



TV HOUSEHOLDS THAT RECEIVE DTT ON EVERY WORKING TV SET

88% 94%



PERSONAL VIDEO RECORDER (PVR): PENETRATION WITHIN TV HOUSEHOLDS

54% 55%



2+ PVR: PENETRATION WITHIN TV HOUSEHOLDS

14% 14%



INTERNET CONNECTION: HOUSEHOLD PENETRATION

80% 80%



TABLETS: HOUSEHOLD PENETRATION

33% 42%



INTERNET CAPABLE TV IN HOME

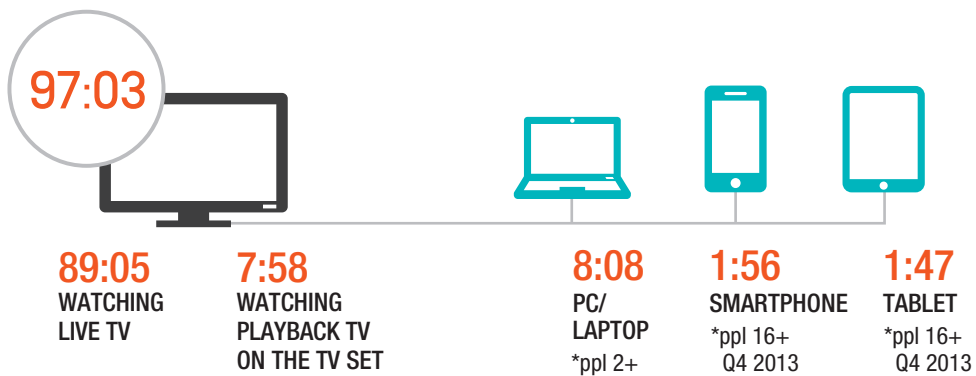
22% 27%



SMARTPHONES: PEOPLE 16+ MOBILE PHONE SUBSCRIBERS

65% 71%

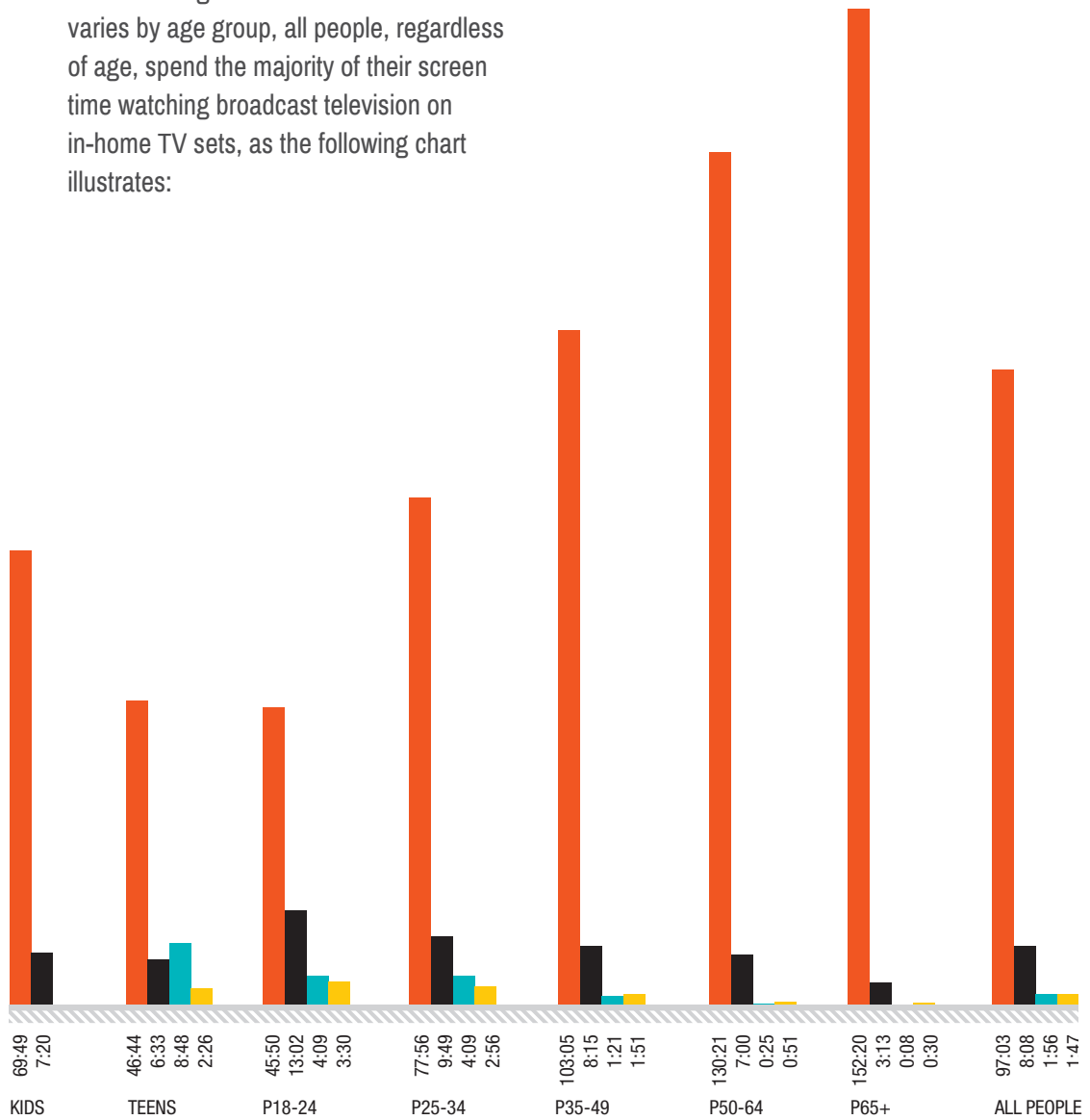
VIDEO VIEWING, AVERAGE TIME SPENT PER MONTH, TV / PC / SMARTPHONE / TABLET



MONTH IN A LIFE

TV / PC / LAPTOP / SMARTPHONE / TABLET

While viewing of television and other video varies by age group, all people, regardless of age, spend the majority of their screen time watching broadcast television on in-home TV sets, as the following chart illustrates:



WATCHING TV IN THE HOME



WATCHING ANY ONLINE VIDEO ON PC/LAPTOP (P2+)



WATCHING ANY ONLINE VIDEO ON A SMARTPHONE (P16+) Q4 2013



WATCHING ANY ONLINE VIDEO ON A TABLET (P16+) Q4 2013

TOTAL TV SCREEN USAGE

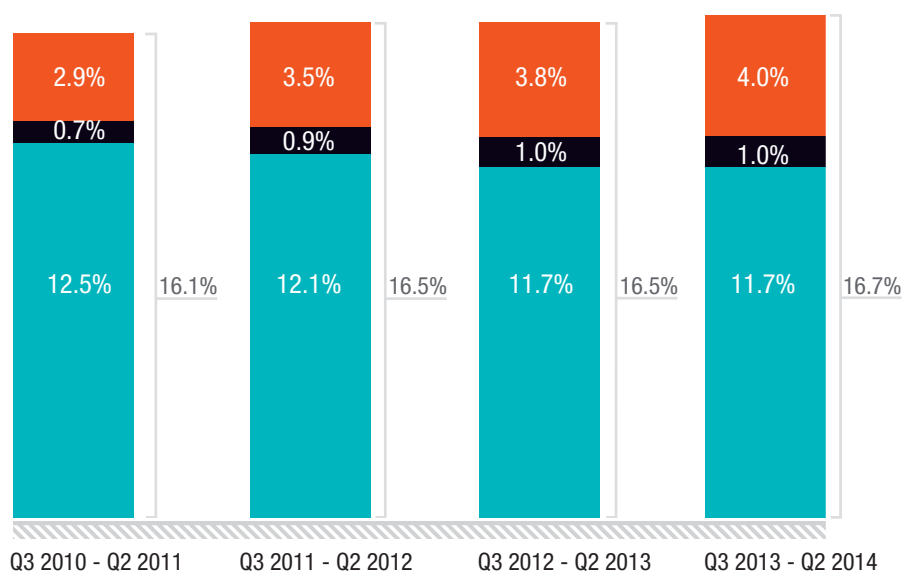
Australians' total use of the TV set has grown year-on-year, averaging out at 16.7 per cent TARP across the whole day (Q3 2013 – Q2 2014). This compares to 16.5 per cent TARP in the corresponding period a year earlier.

Live and playback viewing have been steady for the past two years (at 11.7 per cent TARP and 1.0 per cent TARP, respectively), with other screen use rising – that is, when people use their TV screens for purposes such as gaming, viewing over-the-top (OTT) internet-delivered services, internet browsing, or watching playback material they have recorded beyond seven days from original broadcast.

The growth in total TV screen use reflects the progressive take-up of new devices attached to the TV set (e.g., games consoles, PVRs and OTT services) as well as the take-up of TVs with the capability to connect to the internet: now in an estimated 27 per cent of homes compared to 22 per cent in Q2 2013.

Interestingly such secondary TV screen usage has not come at the expense of live or playback viewing in the past year. Rather, more people are in front of the TV set, and increasing their use of it – reinforcing the big screen's position as the household main screen.

TARP - TOTAL INDIVIDUALS



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 Q3 2013 – Q2 2014 (far right bar, left) an estimated 16.7 per cent of Australians were using their in-home TV screens.

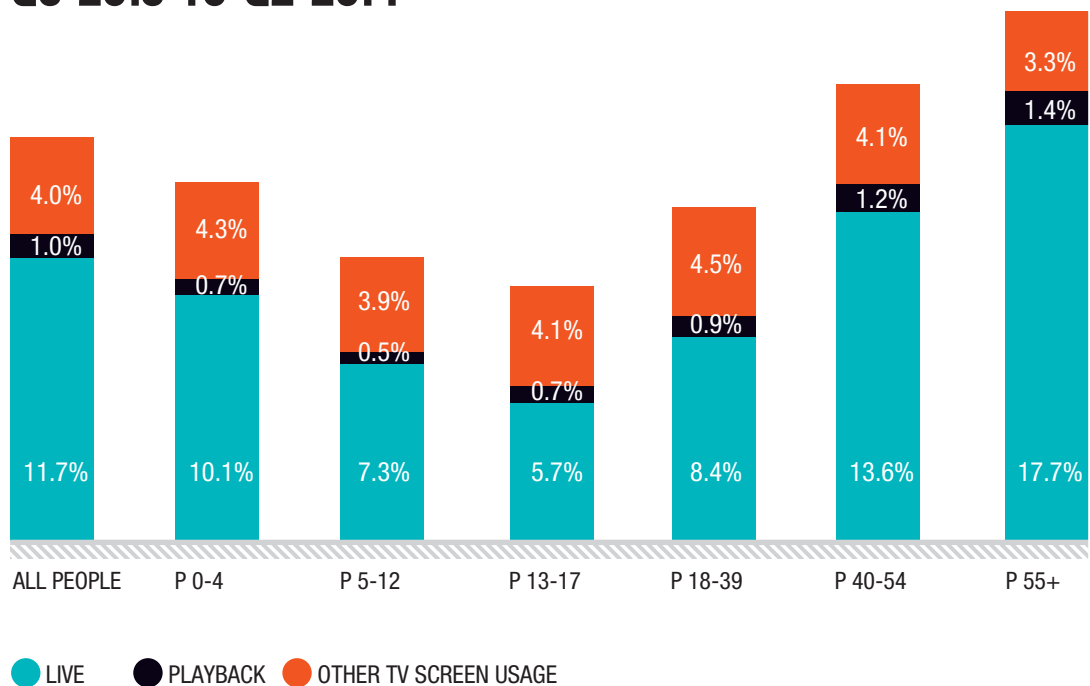
● LIVE ● PLAYBACK ● OTHER TV SCREEN USAGE

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



While use of the TV screen varies by age, all main age groups spend the majority of their time with the in-home TV set watching live broadcast television. This behaviour is consistent with that depicted in the 'month in a life' video viewing graphic on page 7.

TARP BY DEMOGRAPHIC Q3 2013 TO Q2 2014



KEY OBSERVATIONS

TABLE 1: TECHNOLOGY PENETRATION

| | Q2 2013 | Q3 2013 | Q4 2013 | Q1 2014 | Q2 2014 |
|--|---------|---------|---------|---------|---------|
| Completely DTT: Penetration within TV households (Homes capable of receiving DTT on each working TV within the home) | 88% | 89% | 91% | 93% | 94% |
| Personal video recorder (PVR): Penetration within TV households | 54% | 53% | 53% | 54% | 55% |
| 2+PVR: Penetration within TV households | 14% | 14% | 14% | 14% | 14% |
| Internet Connection: Household penetration ³ | 80% | 80% | 80% | 80% | 80% |
| Tablets: Household penetration | 33% | 37% | 40% | 42% | 42% |
| Internet Capable TV in home | 22% | 22% | 23% | 27% | 27% |
| Smartphones: People 16+ ⁴ | 65% | 67% | 68% | 69% | 71% |

TABLE 2: MONTHLY TIME SPENT (HH:MM)

| | Q2 2013 | Q3 2013 | Q4 2013 | Q1 2014 | Q2 2014 |
|--|---------|---------|---------|---------|---------|
| Watching TV in the home ⁵ | 96:37 | 95:51 | 92:39 | 93:16 | 97:03 |
| Watching Playback TV | 7:46 | 7:10 | 6:47 | 7:15 | 7:58 |
| Online time spent per person ⁶ | 38:41 | 38:45 | 37:39 | 38:41 | 39:27 |
| Watch video on Internet ⁷ | 6:26 | 5:18 | 5:52 | 7:48 | 8:08 |
| Watching online video on a smartphone ⁸ | N.A. | N.A. | 1:56 | N.A. | N.A. |
| Watching online video on a tablet ⁸ | N.A. | N.A. | 1:47 | N.A. | N.A. |

³ 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 landline CATI ES prior to Q1 2014. Q1 2014 onwards, 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.

⁴ Source: Nielsen Consumer & Media View national population aged 16+ (Q4 2013 onwards).

⁵ 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. Please note television viewing is seasonal, with people watching more television in the winter months and with the end of daylight saving time.

⁶ Source: Nielsen Online Ratings – Hybrid Surfing from Q2 2013 onwards. Estimate is the average of the 3 months within the calendar quarter apart from Q2 2013 which is an estimate of May-June 2013 only. Figures are national and for People 2+-. Figures include all online activities inclusive of PC applications such as iTunes, Skype etc.

⁷ Source: Nielsen Online Ratings – Hybrid Streaming (formerly VideoCensus) from Q3 2013 onwards. 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.

⁸ 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 (4.3). Figure relates to online video only.

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

| | Q2 2013 | Q3 2013 | Q4 2013 | Q1 2014 | Q2 2014 |
|---|------------|------------|------------|------------|------------|
| Watching TV in the home ⁹ | 21,751 | 21,735 | 21,750 | 21,859 | 21,920 |
| Watching Playback TV | 10,092 | 9,712 | 9,745 | 10,946 | 11,210 |
| Online unique audience ¹⁰ | 16,979 | 16,744 | 16,193 | 16,235 | 17,394 |
| Watch video on Internet ¹¹ | 12,055 | 12,313 | 12,080 | 12,323 | 13,516 |
| Owning/using a mobile phone ¹² | 17,530 | 17,504 | 17,303 | 17,394 | 17,409 |
| Watching online video on smartphone ¹³ | N.A. | N.A. | 2,824 | N.A. | N.A. |
| Watching online video on tablet ¹³ | N.A. | N.A. | 2,209 | N.A. | N.A. |

TABLE 4: A MONTH IN THE LIFE – Q2 2014

| | KIDS ¹⁴ | TEENS ¹⁵ | P18-24 | P25-34 | P35-49 | P50-64 | P65+ | ALL PEOPLE ¹⁷ | |
|--|--------------------|---------------------|--------|--------|--------|--------|--------|-----------------------------|------|
| Watching TV in the home ¹⁶ | 69:49 | 46:44 | 45:50 | 77:56 | 103:05 | 130:21 | 152:20 | 97:03 | |
| Q2 2013 | 66:46 | 49:45 | 47:18 | 81:24 | 103:07 | 128:52 | 151:20 | 96:37 | |
| Watching Playback TV | 4:27 | 4:40 | 4:55 | 7:17 | 9:06 | 10:59 | 10:42 | 7:58 | |
| Q2 2013 | 4:20 | 4:57 | 4:52 | 7:31 | 9:50 | 10:20 | 8:54 | 7:46 | |
| Online time spent per person ¹⁷ | 7:27 | 11:27 | 40:00 | 44:18 | 42:50 | 43:57 | 28:26 | 39:27 | |
| Watch video on Internet ¹⁸ | 7:20 | 6:33 | 13:02 | 9:49 | 8:15 | 7:00 | 3:13 | 8:08 | |
| Watching online video on a smartphone ¹⁹ | Q4 2013 | N.A. | 8:48 | 4:09 | 4:09 | 1:21 | 0:25 | 0:08 | 1:56 |
| Watching online video on tablet ¹⁹ | Q4 2013 | N.A. | 2:26 | 3:30 | 2:56 | 1:51 | 0:51 | 0:30 | 1:47 |

⁹ 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.

¹⁰ Source: Nielsen Online Ratings – Hybrid Surfing from Q2 2013 onwards. Estimate is the average of the 3 months within the calendar quarter apart from Q2 2013 which is an estimate of May-June 2013 only. Figures are national and for People 2+. Figure includes all online activities inclusive of PC applications such as iTunes, Skype etc.

¹¹ 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.

¹² Mobile phone ownership and usage sourced from Nielsen Consumer & Media View (people aged 14+).

¹³ Smartphone and tablet video source: Nielsen Australian Connected Consumers report from 2013-2014 (February 2014 edition) - national figures produced annually citing 16% of the online population aged 16+ for smartphone video and 8% for tablet video. Audience figure calculated using national online active audience of 14,808,513 from Nielsen Online Ratings (January 2014).

¹⁴ Combined Metro OzTAM and Regional TAM data defines 'Kids' aged 0-12 and Nielsen Netview aged 2-11.

¹⁵ Combined Metro OzTAM and Regional TAM data defines 'Teens' aged 13-17, Nielsen Netview aged 12-17 and Nielsen AOC aged 16-17.

¹⁶ 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.

¹⁷ Source: Nielsen Online Ratings – Hybrid Surfing from Q2 2013 onwards. Estimate is the average of the 3 months within the calendar quarter apart from Q2 2013 which is an estimate of May-June 2013 only. Figures are national and for people 2+. Figure includes all online activities inclusive of PC applications such as iTunes, Skype etc.

¹⁸ Source: Nielsen Online Ratings – Hybrid Streaming (formerly VideoCensus) from Q3 2013 onwards. 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.

¹⁹ Smartphone 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.

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

| KIDS | Q2 2013 | Q3 2013 | Q4 2013 | Q1 2014 | Q2 2014 |
|---|--------------------|--------------------|--------------------|--------------------|--------------------|
| Watching TV in the home ¹⁶ | 66:46 | 67:20 | 66:18 | 65:06 | 69:49 |
| Watching Playback TV | 4:20 | 4:11 | 3:42 | 4:02 | 4:27 |
| Online time spent per person ¹⁷ | 6:34 | 7:38 | 8:04 | 5:36 | 7:27 |
| Watching video on Internet ¹⁸ | 4:37 | 3:55 | 5:35 | 7:05 | 7:20 |
| Watching online video on a smartphone ¹⁹ | N.A. | N.A. | N.A. | N.A. | N.A. |
| Watching online video on a tablet ¹⁹ | N.A. | N.A. | N.A. | N.A. | N.A. |

| TEENS | Q2 2013 | Q3 2013 | Q4 2013 | Q1 2014 | Q2 2014 |
|---|--------------------|--------------------|--------------------|--------------------|--------------------|
| Watching TV in the home ¹⁶ | 49:45 | 49:17 | 47:33 | 45:12 | 46:44 |
| Watching Playback TV | 4:57 | 4:26 | 4:30 | 4:13 | 4:40 |
| Online time spent per person ¹⁷ | 14:47 | 14:41 | 13:01 | 9:55 | 11:27 |
| Watching video on Internet ¹⁸ | 7:18 | 6:33 | 6:27 | 6:40 | 6:33 |
| Watching online video on a smartphone ¹⁹ (Q4 2013) | N.A. | N.A. | 8:48 | N.A. | N.A. |
| Watching online video on a tablet ¹⁹ (Q4 2013) | N.A. | N.A. | 2:26 | N.A. | N.A. |

| P18-24 | Q2 2013 | Q3 2013 | Q4 2013 | Q1 2014 | Q2 2014 |
|---|--------------------|--------------------|--------------------|--------------------|--------------------|
| Watching TV in the home ¹⁶ | 47:18 | 46:37 | 43:24 | 45:14 | 45:50 |
| Watching Playback TV | 4:52 | 4:36 | 4:22 | 4:42 | 4:55 |
| Online time spent per person ¹⁷ | 23:07 | 42:04 | 42:29 | 40:37 | 40:00 |
| Watching video on Internet ¹⁸ | 13:01 | 10:50 | 12:23 | 16:28 | 13:02 |
| Watching online video on a smartphone ¹⁹ (Q4 2013) | N.A. | N.A. | 4:09 | N.A. | N.A. |
| Watching online video on a tablet ¹⁹ (Q4 2013) | N.A. | N.A. | 3:30 | N.A. | N.A. |

| P25-34 | Q2 2013 | Q3 2013 | Q4 2013 | Q1 2014 | Q2 2014 |
|---|--------------------|--------------------|--------------------|--------------------|--------------------|
| Watching TV in the home ¹⁶ | 81:24 | 77:28 | 71:20 | 74:21 | 77:56 |
| Watching Playback TV | 7:31 | 6:41 | 6:03 | 6:56 | 7:17 |
| Online time spent per person ¹⁷ | 43:53 | 43:57 | 43:12 | 42:16 | 44:18 |
| Watching video on Internet ¹⁸ | 8:39 | 7:26 | 7:55 | 10:05 | 9:49 |
| Watching online video on a smartphone ¹⁹ (Q4 2013) | N.A. | N.A. | 4:09 | N.A. | N.A. |
| Watching online video on a tablet ¹⁹ (Q4 2013) | N.A. | N.A. | 2:56 | N.A. | N.A. |

| P35-49 | Q2 2013 | Q3 2013 | Q4 2013 | Q1 2014 | Q2 2014 |
|---|--------------------|--------------------|--------------------|--------------------|--------------------|
| Watching TV in the home ¹⁶ | 103:07 | 104:26 | 98:56 | 98:06 | 103:05 |
| Watching Playback TV | 9:50 | 8:46 | 7:51 | 8:13 | 9:06 |
| Online time spent per person ¹⁷ | 43:42 | 41:33 | 40:43 | 42:48 | 42:50 |
| Watching video on Internet ¹⁸ | 6:02 | 4:53 | 5:28 | 7:17 | 8:15 |
| Watching online video on a smartphone ¹⁹ (Q4 2013) | N.A. | N.A. | 1:21 | N.A. | N.A. |
| Watching online video on a tablet ¹⁹ (Q4 2013) | N.A. | N.A. | 1:51 | N.A. | N.A. |

| P50-64 | Q2 2013 | Q3 2013 | Q4 2013 | Q1 2014 | Q2 2014 |
|---|--------------------|--------------------|--------------------|--------------------|--------------------|
| Watching TV in the home ¹⁶ | 128:52 | 127:56 | 125:19 | 124:37 | 130:21 |
| Watching Playback TV | 10:20 | 9:34 | 9:13 | 9:40 | 10:59 |
| Online time spent per person ¹⁷ | 40:53 | 41:17 | 40:27 | 43:55 | 43:57 |
| Watching video on Internet ¹⁸ | 3:39 | 3:09 | 3:23 | 5:20 | 7:00 |
| Watching online video on a smartphone ¹⁹ (Q4 2013) | N.A. | N.A. | 0:25 | N.A. | N.A. |
| Watching online video on a tablet ¹⁹ (Q4 2013) | N.A. | N.A. | 0:51 | N.A. | N.A. |

| P65+ | Q2 2013 | Q3 2013 | Q4 2013 | Q1 2014 | Q2 2014 |
|---|--------------------|--------------------|--------------------|--------------------|--------------------|
| Watching TV in the home ¹⁶ | 151:20 | 149:15 | 148:42 | 150:36 | 152:20 |
| Watching Playback TV | 8:54 | 8:41 | 9:04 | 9:51 | 10:42 |
| Online time spent per person ¹⁷ | 25:17 | 26:36 | 26:59 | 28:48 | 28:26 |
| Watching video on Internet ¹⁸ | 2:06 | 1:58 | 2:29 | 2:42 | 3:13 |
| Watching online video on a smartphone ¹⁹ (Q4 2013) | N.A. | N.A. | 0:08 | N.A. | N.A. |
| Watching online video on a tablet ¹⁹ (Q4 2013) | N.A. | N.A. | 0:30 | N.A. | N.A. |

| ALL PEOPLE | Q2 2013 | Q3 2013 | Q4 2013 | Q1 2014 | Q2 2014 |
|---|--------------------|--------------------|--------------------|--------------------|--------------------|
| Watching TV in the home ¹⁶ | 96:37 | 95:51 | 92:39 | 93:16 | 97:03 |
| Watching Playback TV | 7:46 | 7:10 | 6:47 | 7:15 | 7:58 |
| Online time spent per person ¹⁷ | 38:41 | 38:45 | 37:39 | 38:41 | 39:27 |
| Watching video on Internet ¹⁸ | 6:26 | 5:18 | 5:52 | 7:48 | 8:08 |
| Watching online video on a mobile phone ¹⁹ (Q4 2013) | N.A. | N.A. | 1:56 | N.A. | N.A. |
| Watching online video on a tablet ¹⁹ (Q4 2013) | N.A. | N.A. | 1:47 | N.A. | N.A. |

TABLE 5: VIDEO AUDIENCE COMPOSITION (BY AGE AND GENDER) – Q2 2014

| | KIDS | TEENS | P18-24 | P25-34 | P35-49 | P50-64 | P65+ | FEMALES | MALES |
|---------------------------------|------|-------|--------|--------|--------|--------|------|---------|-------|
| On Traditional TV ²⁰ | 12% | 3% | 5% | 12% | 22% | 24% | 23% | 53% | 47% |
| Q2 2013 | 11% | 3% | 5% | 12% | 22% | 24% | 22% | 53% | 47% |
| On Internet ²¹ | 2% | 3% | 11% | 19% | 30% | 24% | 12% | 49% | 51% |

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 Online Ratings - Hybrid Streaming (formerly VideoCensus), from Q3 2013 onwards. 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.

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.
- 'Broadcast television' includes free-to-air and subscription television viewing.
- 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 playing back recorded TV content outside of the seven-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 Connected Consumer

report 2014 (ACC) based on online national population aged 16+.

- Mobile phone ownership and usage sourced from Nielsen Consumer & Media View (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 Consumer report defines 'Teens' as respondents aged 16-17 and 'Male' / 'Female' respondents aged 16+.
- 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

Should you require more information about any content in this report, please refer to:



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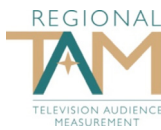
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