

# Australian VIDEO VIEWING REPORT

QUARTER 2 2017

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measuring audiences

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MEASUREMENT

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# Introduction



Welcome to the Australian Video Viewing Report covering the second quarter of calendar 2017. Its findings confirm the ongoing trend whereby people increasingly take advantage of the nearly infinite choice in video content and means of accessing it.

Australians are voracious video consumers and new technologies, particularly portable connected devices, dramatically expand viewing opportunities. The flexibility to watch what you want, whenever you want, encourages the 'spreading' activity across various platforms and screens that our report has been documenting for several years. In the process, time spent watching live and time-shifted television is gradually declining.

Most Australians – young and old – still watch broadcast TV however. And despite claims that millennials are deserting 'the box', two thirds of 18-24 year-olds, who are traditionally among the lightest TV viewers relative to the overall population,

watched broadcast TV channels weekly in the latest quarter. On average, Australians now spend 2 hours and 41 minutes a day watching broadcast TV on in-home sets. Perhaps surprisingly given the range of options now available, that's down just 37 minutes per day over the past six years (since Q2 2011).

The increasingly fragmented media landscape has created a need for more frequent and detailed delivery of digital audience measurement across different types of content, devices and times of day. In response Nielsen, in collaboration with iab Australia, recently launched Digital Content Ratings (DCR) to better understand peoples' interaction with text, video and audio content across key digital devices with daily reporting. We are delighted to introduce DCR data in this issue of the Australian Video Viewing Report for average time spent viewing online video on desktop and laptop computers, smartphones and tablets. Please bear in mind that DCR uses a different methodology to

the Nielsen Online Ratings – Hybrid Streaming data referenced in the Q1 2017 Australian Video Viewing Report and in its predecessor, the Multi-Screen Report. For that reason, comparisons between DCR and historical NOR data should not be made.

To explore the variety of factors that influence viewing behaviour, our Spotlight in this issue looks at the population characteristics of Australia's five mainland capital cities for insight into how and why TV consumption patterns vary between these markets.

We appreciate feedback received on the inaugural issue of this report and the positive response to its simplified and streamlined format. We will continually evolve it to include the best available data and insights, and hope you'll continue to give us your thoughts on how you use the information and what you'd like to see in future. Our contact details are on the back page: please don't hesitate to get in touch.

## Regards

*Tony Hogarth*  
REGIONAL TAM CHAIR

*Doug Peiffer*  
OZTAM CEO

*Craig Johnson*  
NIELSEN REGIONAL MD, MEDIA

# Screens in Australian homes

**T**he total number of screens in Australian homes continues to rise, reaching an average 6.6 per household in Q2 2017. That compares to 6.4 per home in Q2 2016, and 6.0 a year before that. The majority of these screens are internet capable.

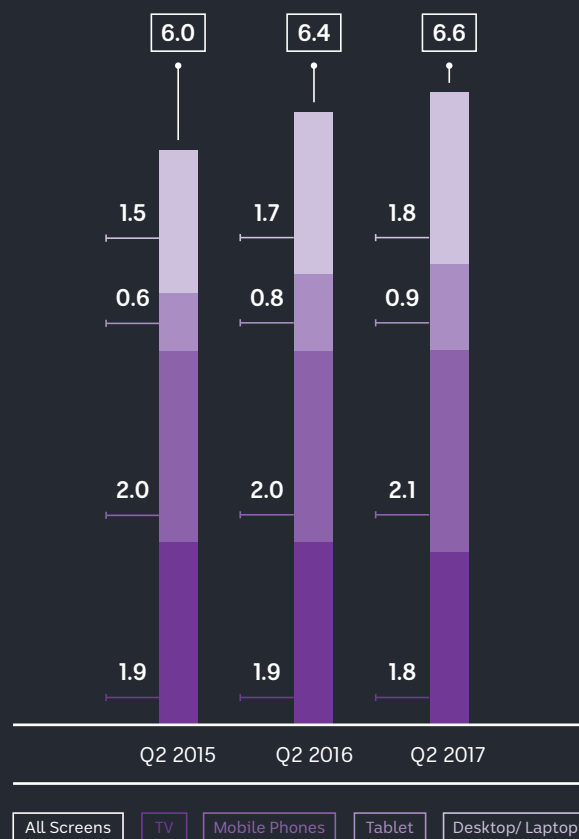
Growth rates for various devices are tapering off as are penetration levels (please see Table 1 at the end of the report) with many consumers retaining older model devices for secondary use when upgrading to new ones.

The average number of **mobile phones**, **tablets** and **desktop/laptop computers** in homes has increased slightly year-on-year: now at 2.1, 0.9 and 1.8 respectively. Over the same period there are slightly fewer household **TV sets**, now at 1.8 compared to 1.9 in Q2 2016.

Because consumers can take portable connected devices along with them wherever they go, they have many more opportunities to watch online video. As mobile screens have become commonplace, they have contributed to the gradual and steady decline in time spent watching live and time-shifted broadcast TV on in-home sets, examined in the following section.



More devices, more opportunity to view – especially as the majority of screens in homes are now internet capable.



Source: Estimates for the average number of TVs and mobile phones in homes are based on OzTAM Metro and Regional TAM Establishment Surveys. Tablet and desktop/laptop estimates are based on OzTAM Metro and Regional TAM long Establishment Surveys using hybrid estimates of incidence per home covered by full Household Information/ Household Update surveys.

# Viewing patterns across devices and the day

## BROADCAST TV VIEWING ON TV SETS

**E**ach week in Q2 2017, 20 million Australians watched **broadcast TV**

(free-to-air and subscription channels) on in-home TV sets. That equates to 84.2 per cent of the population in people metered markets.

Reach is strong among viewers of all ages. For example 66.1 per cent of 18-24 year-olds, who are relatively lighter TV viewers than the

population as a whole, watched weekly in the quarter.

In prime time, when the impact of screen and platform choice on viewing behaviour is most pronounced, TV viewing levels also remain high. Just over 19 million Australians (80.1 per cent of the population in metered markets) watched some broadcast TV on their home sets between 6pm and midnight each week in Q2 2017.



20 million Australians watch free-to-air and/or subscription TV on in-home sets each week.

## > BROADCAST TV VIEWING ON IN-HOME TV SETS EACH WEEK

	0200 - 2600			1800 - 2400		
	Q2 2016	Q2 2017	Q2 2017	Q2 2016	Q2 2017	Q2 2017
	% Reach	% Reach	Weekly Average Cumulative Reach	% Reach	% Reach	Weekly Average Cumulative Reach
All People	87.1	84.2	20.01m	83.5	80.1	19.04m
Kids	87.8	83.8	3.26m	79.0	73.5	2.86m
Teens	77.9	72.3	1.03m	71.2	65.6	0.94m
P18-24	70.9	66.1	1.48m	65.2	60.1	1.34m
P25-39	83.1	79.1	4.04m	79.7	75.3	3.84m
P40-54	92.3	90.2	4.26m	91.0	88.3	4.17m
P55-64	93.9	92.8	2.54m	93.1	91.6	2.5m
P65+	94.0	93.4	3.42m	93.2	92.6	3.4m

Source: OzTAM and Regional TAM databases with overlap homes de-duplicated. Average 1-minute weekly cumulative reach across the population in OzTAM and Regional TAM coverage areas.

Includes live viewing and playback through the TV set at the time it is watched within 28 days.

Time bands use the industry standard 26-hour TV clock: 0200-2600 = 2am-2am; 1800-2400 = 6pm-midnight

## TOTAL USE OF THE TV SET

**F**or several years, the way Australians use their TVs has been changing as sets become increasingly multi-functional and 'smart'. Because people can use TVs for many purposes other than watching live or playing back broadcast television, Australians now devote 28 per cent of their time with their sets to **other TV screen use**, which includes gaming, watching TV network catch-up services, internet browsing, and accessing non-broadcast video via social media networks or SVOD services.

Other TV screen use contributes to Australians' growing tendency to spread their viewing across screens and devices. This behaviour is particularly apparent in prime time, when people generally have the most available time to view.

On an all-day basis Australians spend 31 hours and 38 minutes (31:38) per month with their TV sets doing something other than watching live or playing back broadcast TV within 28 days. In prime time the proportion is 25 per cent (14:25).

Across the day, other TV screen use rose by 1:57 a month year-on-year, from 29:41 per person in Q2 2016 to 31:38 in Q2 2017. Other TV screen use in prime time rose by 1:13.

Each month in Q2 2017, Australians in people metered markets watched an average 9:04 of **playback TV** through their TV sets within 28 days of the live broadcast. In prime time such viewing was 5 hours.

Other TV screen use and 8-28 day time-shifted viewing now account

for 15:16 per month per Australian in prime time and 33:17 per month across the day. The growth in such activity contributes to the progressive decline in live and playback to 7 TV viewing over the past few years.

Year-on-year total TV screen use was down by 6:39 on average per month across the day, and by 3:09 in prime time, driven mainly by lower live TV viewing.

On a daily basis, Australians spend 2:41 watching live and playing back recorded TV content through their TV sets. Even with dramatically increased screen and content choice in recent years, that's just 37 fewer minutes per day than in Q2 2011.



Australians watch 2 hours and 41 minutes of live and time-shifted TV on in-home TV sets every day.



## THE TV SET NOW GOES WELL BEYOND TV

TVs are now highly versatile thanks to online capabilities and devices attached to the set.

As a result, Australians now spend more than a quarter of their time with TV sets doing something other than watching live or time-shifted TV. This contributes to the gradual decline in the amount of live and playback broadcast content viewed, and is particularly apparent in prime time.



## ➤ TOTAL USE OF THE TV SET [MONTHLY AVERAGE]

	0200 - 2600		1800 - 2400	
	Q2 2016 HH:MM	Q2 2017 HH:MM	Q2 2016 HH:MM	Q2 2017 HH:MM
<b>Total TV Screen Use</b>	<b>119:42</b>	<b>113:03</b>	<b>61:09</b>	<b>58:00</b>
<b>Total Broadcast TV:</b>	<b>90:01</b>	<b>81:25</b>	<b>47:57</b>	<b>43:34</b>
Watching Live TV	80:22	72:21	42:39	38:33
Watching Playback to 7 TV	8:03	7:25	4:30	4:09
Watching Time Shift 8-28 TV	1:36	1:39	0:48	0:51
<b>Other TV Screen Use</b>	<b>29:41</b>	<b>31:38</b>	<b>13:12</b>	<b>14:25</b>

Time bands use the industry standard 26-hour TV clock: 0200-2600 = 2am-2am; 1800-2400 = 6pm-midnight | All People

**Other TV screen use** includes activities such as gaming; viewing TV network catch up services; watching DVDs; playingback recorded broadcast material beyond 28 days; internet browsing; streaming music; watching video on platforms such as YouTube, Facebook or Vimeo; and accessing over-the-top internet-delivered video services (SVOD).

## BROADCAST TV VIEWING ON CONNECTED DEVICES

**O**zTAM Video Player Measurement (VPM) data shows that, on average, Australians play 306 million minutes of broadcasters' online content weekly on connected devices. In Q2 2017 this comprised 233 million minutes of catch up (or on demand) viewing, and 73 million minutes of live-streamed material each week.

Overall VPM represents around 1-2 per cent of all broadcast TV viewed, and the amount of content watched in this way is growing (please see text opposite). And just as time-shifted viewing on TV sets can be a sizable portion of some broadcast programs' total audiences, VPM ratings can also be a significant component.

In the next section we look at online video viewing on desktop and laptop computers, and on smartphones and tablets.

**OzTAM VPM data** captures minute-by-minute viewing of participating broadcasters' online 'catch up TV' (video on demand) and live-streamed content played to connected devices such as tablets, smartphones, smart TVs, games consoles and desktops/laptops. As of Q2 2017 those broadcasters are the ABC, Seven Network, Nine Network, Network TEN, SBS and Foxtel.



### A GROWING HABIT

The amount of broadcasters' online TV content viewed continues to rise. At an average 306 million minutes weekly in Q2 2017, this is well up on an average 216 million minutes captured by OzTAM's VPM service a year earlier.

### NOT ALL OF THAT INCREASE IS ORGANIC:

up to half is due to the greater number of platforms that have implemented OzTAM's VPM integration software, allowing OzTAM to capture viewing from those video servers. There is no doubt however that Australians are watching more online TV than ever.



## ONLINE VIDEO VIEWING ON COMPUTERS, SMARTPHONES AND TABLETS

**A**ustralians aged 18+ now spend on average 20 hours and 30 minutes (20:30) per month watching online video on a desktop, laptop, smartphone or tablet. People aged 25-34 watched the most video in aggregate on connected devices (29:06) while people 65+ watched the least (4:45 per month).

25-34 year-olds are the heaviest viewers on smartphones (10:54 per month), while 18-24s watch the most on desktops/laptops (10:41). Across the adult population, people on average spend 5:45 per month watching streamed video on tablets.

**Watching video on a desktop, laptop, smartphone and tablet** includes broadcast and non-broadcast online streamed video such as YouTube, Facebook, Vimeo and news services; internet-delivered subscription video (SVOD); and TV broadcasters' free catch up and live-streamed services. It does not capture content that is downloaded and then watched later, and also excludes adult and advertising material.

## HOW MUCH VIEWING GOES TO SVOD?

Viewing of subscription video on demand (SVOD) services is captured in **other TV screen use**, and in **watching online video** on a desktop, laptop, smartphone or tablet.





# Spotlight: Australian metro market profiles

**W**hen you're home and looking to watch TV or other video, how are you doing that these days?

Perhaps you now prefer your tablet for catching up on your favourite shows? With your smart TV at the ready, are your evenings increasingly a choice between watching live-to-air TV, streaming the latest subscription video on demand (SVOD) series, playing a game with others around the world, or discovering a YouTube channel you never knew existed before?

Are your friends doing much the same? How about your kids? Your parents?

As successive issues of this report and its predecessor, the Australian

Multi-Screen Report, have shown, many factors influence viewing behaviour. These include the number of TV sets and other devices in the home; access to new and mobile technologies; content and platform choice; age, gender, household size and life stage; and employment status and income levels. All of these contribute to viewing activity in individual markets and influence time spent watching TV – particularly in the evenings, when people generally have the most time and options to do so.

In this Spotlight we look at the population characteristics of Australia's five mainland capital cities for insight into how and why their TV consumption patterns differ.

## FOR CONTEXT, LET'S FIRST LOOK AT THE LANDSCAPE AS A WHOLE.

### FIVE METROPOLITAN MARKETS

- 17.07 million people live within Australia's five capital city (OzTAM) markets.
- The population has grown nearly 9 per cent since 2012, and by 1.6 per cent over the past year.
- 55 per cent of the population is under 40-years-old.
- There are 2.6 people per household, on average.
- There are 1.8 TV sets per household, on average.
- Nearly 10 per cent of all prime time viewing was time-shifted in 2017, compared to less than 4 per cent in 2010.
- More than a quarter of people's time with their TV sets now goes to something other than watching live or time-shifted broadcast TV (**'other TV screen use'** – please see pages 5-6 for more about such activity).

### ABOUT THE COMPARATIVE DATA

Insights for the **metropolitan markets** have been indexed against the five-city average.

Source: OzTAM. 2017 metro universe estimates (UEs). Five-city metro Total TV viewing: Consolidated 7 (2010-15) and Consolidated 28 (2015-16). Household income information is self-reported and collected directly from panel homes. As a result some unknown values exist for homes unable or unwilling to provide income details.



## BRISBANE

**B**risbane's age skew is level with the five-city average though it has the second highest proportion of students after Melbourne. Households tend to be smaller, containing just one to two people, but are more likely to have multiple TV sets. Total broadcast TV viewing in prime time is on par with the five-city average.

With a warm and sunny climate enticing people outside, Brisbane has the second highest level of time-shifted viewing, indexing well above the metro market average over the past six years and by nearly 9 per cent in 2017.



More sunshine and time spent outside help make Brisbane viewers the most likely of any metro market to time shift TV.



## SYDNEY

**S**ydney is Australia's largest city (ahead of Melbourne, just!) and has the greatest number of households. With some of Australia's highest income earners, Sydney has a greater proportion of homes earning more than \$90,000 than other cities (jobs keep people outside the home for a substantial part of the day; more disposable income keeps them out during leisure hours). Sydney also has the highest proportion of households with four or more people living there yet only one TV set, so people are more likely to be sharing access to the TV.

While Sydneysiders have a greater propensity to time shift they also devote more of their time with their TV sets to other TV screen use than the five-city average. That - along with a young population skew, high earning levels and fewer TV sets per household - contribute to Sydney's lower than average prime time viewing levels. Since 2010 Sydney has under-indexed the five-city average for total TV viewing in prime time, when most viewing occurs, by an average 4.8 per cent, and by 6.4 per cent in 2017.



A young population skew, high income levels, and more shared TVs contribute to Sydney's lower than average TV viewing levels.



## MELBOURNE

**G**rowing by nearly 10 per cent over the past five years, Melbourne's population is now only slightly behind Sydney's and the two cities have similar household structures. Melbourne has the highest proportion of students across the five cities, more homes with multiple TV sets (though proportionately similar to the five-city average) and the second highest propensity to view broadcast TV in prime time (behind Adelaide).

Melbourne has the highest PVR penetration yet viewers are less likely to time shift: in fact, Melburnians have the highest share of live TV viewing of any city and the lowest share of other TV screen use.



With more multiple TV set homes and lower other TV screen use, Melbourne has the highest share of **live** TV viewing in the five cities.



## ADELAIDE

**A**delaide is the smallest of the five cities and compared to the others has experienced the lowest population growth rate over the past five years. It has the oldest profile, highest proportion of single person households and the lowest income levels, reflecting its greater proportion of retirees. In line with the people aged 40+ skew, Adelaide has the highest TV viewing levels in prime time, over-indexing the five-city prime time average by 12 per cent.

Adelaide has the highest proportion of homes with three or more TV sets, and people are 14 per cent less likely to time shift their viewing than the five-city average.



With the greatest proportions of retirees and single person, multi-TV set households, Adelaide has the highest TV viewing levels in the five cities.



## PERTH

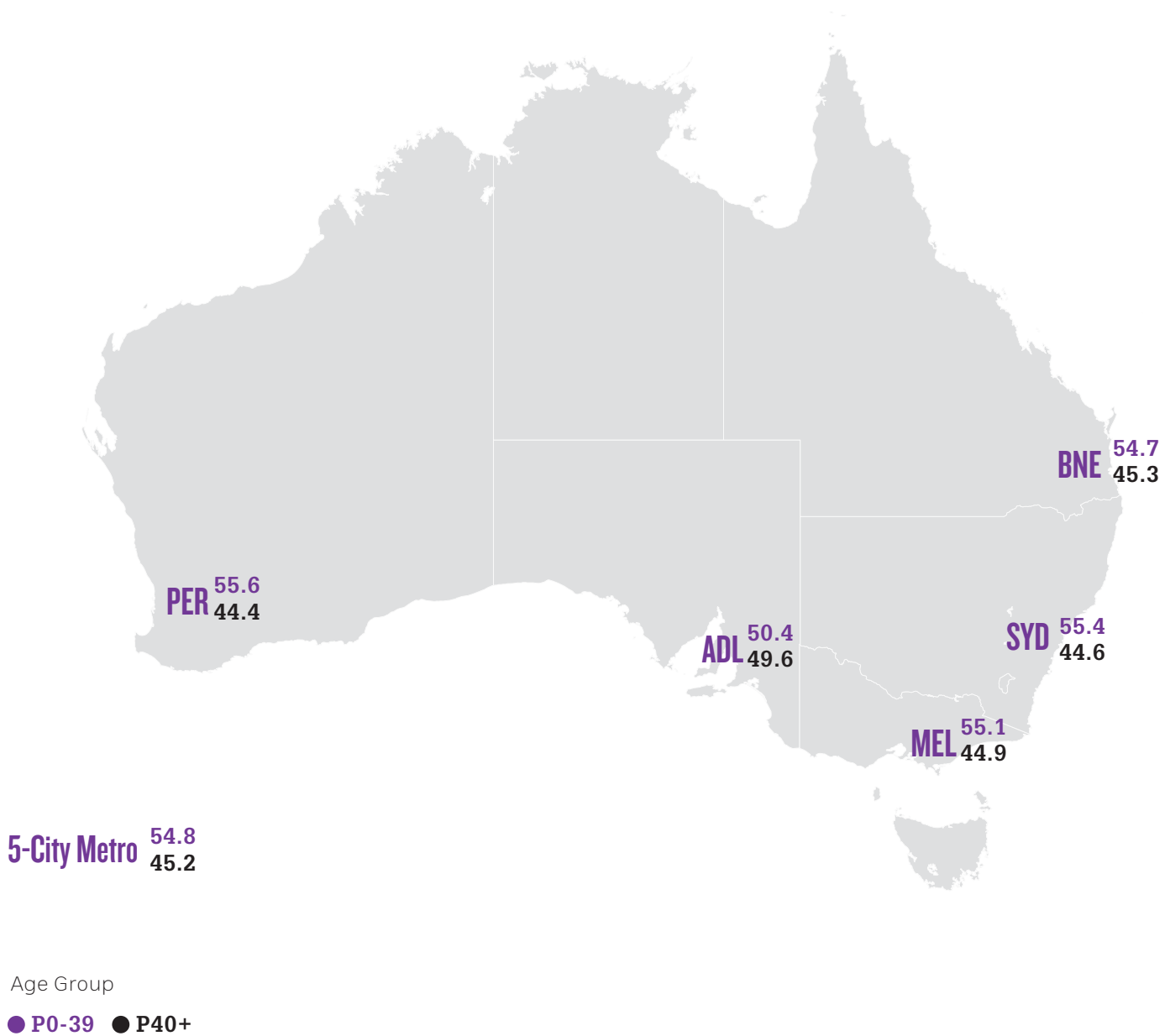
**P**erth has had the strongest metro population growth over the past five years – up 13 per cent – and has highest proportion of people under age 40. There are relatively more homes with one or two people living in them and also higher levels of multiple (two or more) TV set homes. Reflecting its younger age profile, Perth viewers watch relatively less broadcast TV in prime time than the five-city average.

Consistent with its youthful skew, Perth has the highest level of employed individuals and in terms of household income is second only to Sydney. Perth viewers are the second least likely to time shift and more likely than people in other markets to use their TV sets for purposes other than watching live or time-shifted TV.



Perth viewers are less likely to time shift and have the highest levels of other TV screen use.

## AGE GROUP COMPARISONS: 2017




OzTAM | 2017 Universe Estimates  
 People 0-39 and People 40+



## AVERAGE NUMBER OF PEOPLE PER HOUSEHOLD: 2017

HOUSEHOLD % OF MARKET INDEX AGAINST 5-CITY METRO AVERAGE

	BNE	SYD	MEL	ADL	PER
 AVG NO. OF PPL/HH	2.5	2.8	2.7	2.4	2.5
1 Person	104.7	91.9	94.1	117.4	110.5
2 PPL	106.8	94.9	96.0	108.8	102.7
3 PPL	96.0	100.2	110.1	84.5	94.8
4 PPL	88.8	109.8	102.6	87.3	99.6
5+PPL	87.9	122.7	108.6	70.3	72.4

### Interpreting the market indexes:

To demonstrate relative characteristics, individual markets are indexed against the 5-city metro average as a percentage.

For example: the incidence of single person households in Brisbane is 4.7 per cent higher than the 5-city average. Sydney's is 8.1 per cent lower than the average.

OzTAM | 2017 Universe Estimates (Households)

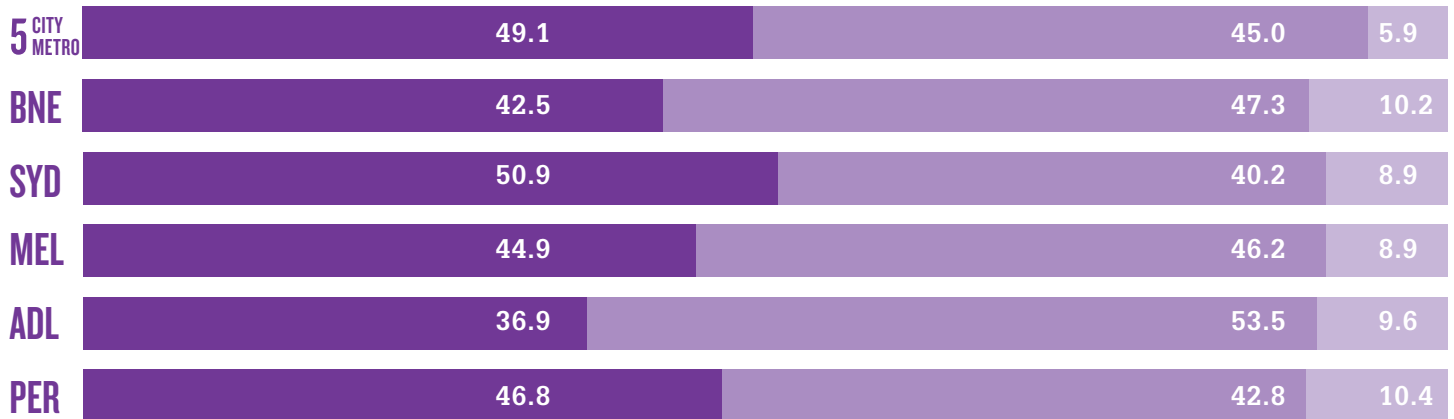
## EMPLOYMENT STATUS (PPL 16+): 2017

EMPLOYMENT STATUS % OF MARKET INDEX AGAINST 5-CITY METRO AVERAGE

	BNE	SYD	MEL	ADL	PER
Employed	101.0	100.2	98.7	94.6	105.0
Unemployed	102.7	102.5	93.5	108.5	99.5
Home Duties	92.7	117.6	88.3	98.3	98.6
Retired/Pensioner	99.5	97.0	101.5	121.5	89.0
Student	97.2	94.5	113.4	87.3	94.2

OzTAM 2017 Universe Estimates (People 16+) | Floating Universe Estimate based on Q1-2, 2017.

## PROPORTION OF HOUSEHOLDS BY HOUSEHOLD INCOME BAND: 2017



● \$90,000 and over ● Under \$90,000 ● Undisclosed

OzTAM 2017 Universe Estimates (Households)  
Floating Universe Estimate based on Q1-2, 2017.

## HOUSEHOLD TV SETS AND PVR PENETRATION BY MARKET: 2017

MARKET PENETRATION % INDEX AGAINST 5-CITY METRO AVERAGE

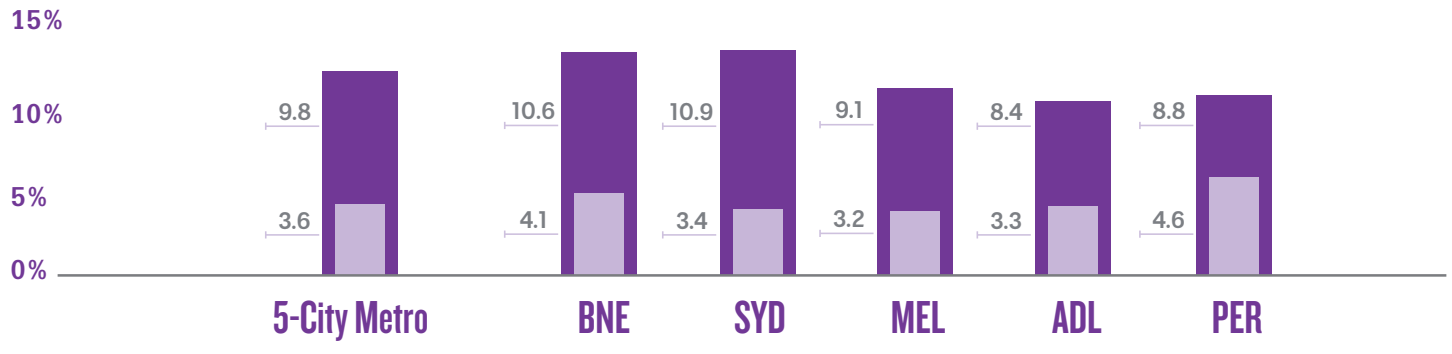


● 1 TV Set ● 2 TV Sets ● 3+ TV Sets ● 1+ PVR

OzTAM 2017 Universe Estimates (Households)  
HH with PVR - Floating Universe Estimate based on Q1-2, 2017.

5-City Metro  
HH Penetration % =  
1 TV SET **43.6%**  
2 TV SETS **33.0%**  
3+ TV SETS **23.4%**  
1+ PVR **60.9%**

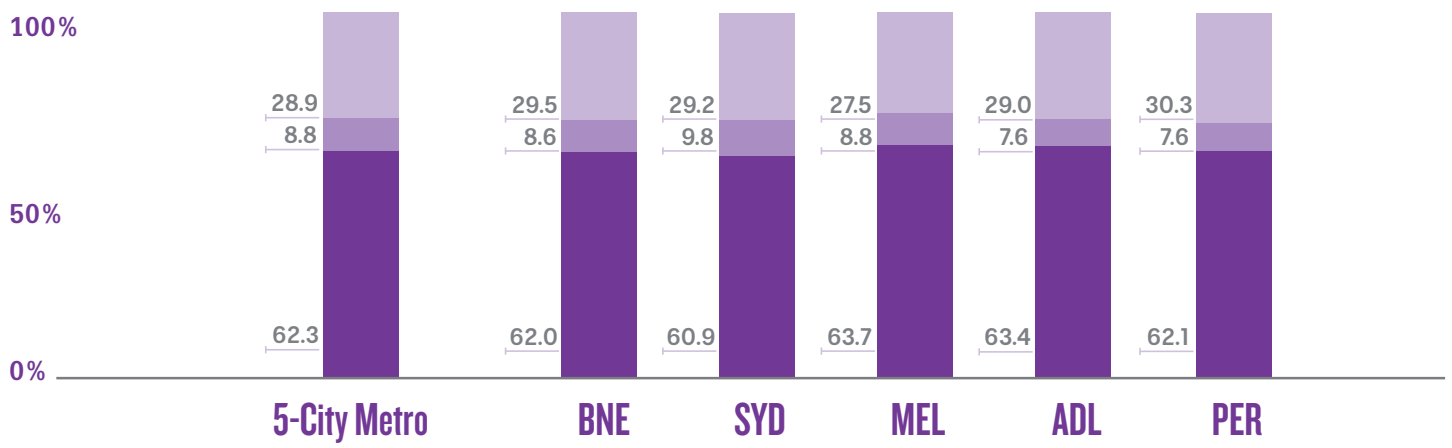
## TIME-SHIFTED VIEWING BY MARKET: 2010 VS 2017



● 2017 ● 2010

OzTAM Surveys 1-6 YoY (excluding Easter) | 2010 Time Shift to 7. 2017 Time Shift to 28  
 2010 Consolidated 7. 2017 Consolidated 28 | Total Individuals | Total TV | Sun-Sat 1800-2400 | TARP %

## TOTAL TV SCREEN USE ACROSS THE DAY

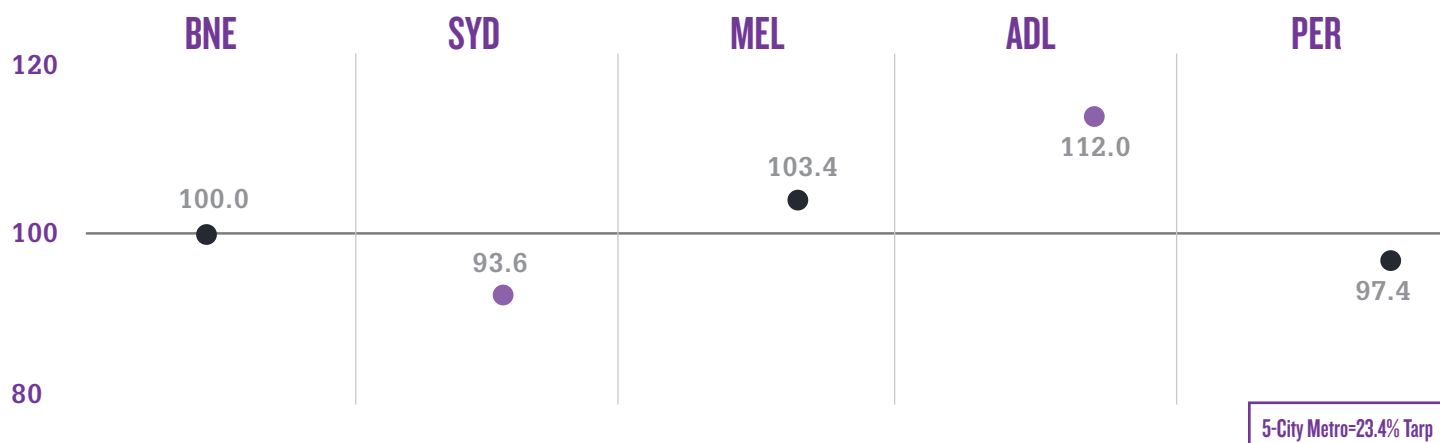


● Live ● Playback ● Other TV screen use

Source OzTAM Total Use Activity | Consolidated 28 viewing | 01/01/2017 - 17/06/2017 | Sun-Sat 0200-2600 | Share %

## PROPENSITY TO VIEW BROADCAST TV: 2017

TARP INDEXED AGAINST 5-CITY METRO AVERAGE

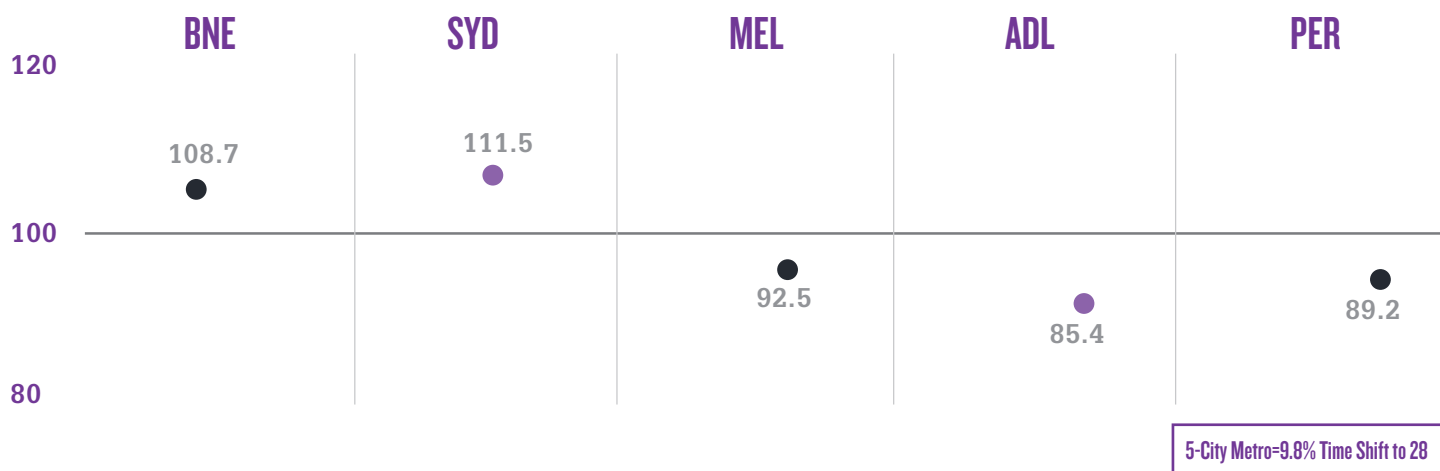


Source OzTAM Weeks 7-34 (excluding Easter) 2017  
Consolidated 28 | Total Individuals | Total TV  
Sun-Sat 1800-2400 | TARP %

**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 between 6pm and midnight in Q1 and Q2 2017, an estimated 23.4 per cent of people in the five-city metro markets were watching broadcast TV.

## PROPENSITY TO TIME SHIFT: 2017

TIME SHIFT AS A % OF CONSOLIDATED 28 INDEXED AGAINST 5-CITY METRO AVERAGE



Source OzTAM Weeks 7-34 (excluding Easter) 2017  
Consolidated 28 | Total Individuals | Total TV  
Sun-Sat 1800-2400 | TARP %



# Key observations

## 1

Technology Penetration	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017
TV households that receive digital terrestrial television (DTT) on every working TV set <sup>1</sup>	97%	97%	97%	97%	98%
TV households that receive high definition (HD) DTT on every working TV set	96%	96%	96%	96%	97%
Personal video recorder (PVR): Penetration within TV households <sup>1</sup>	59%	60%	59%	59%	59%
2+ PVR: Penetration within TV households	17%	17%	18%	17%	17%
Internet connection: Household penetration <sup>2</sup>	81%	80%	80%	79%	80%
Internet capable ('smart') TV in the home <sup>2</sup>	36%	37%	37%	38%	41%
Connected TVs within smart TV homes	64%	66%	66%	69%	69%
Estimated presence of connected smart TVs across all homes	23%	24%	24%	26%	28%
1+ Smartphone: Household penetration <sup>2</sup>	81%	81%	81%	81%	82%
Tablets: Household penetration <sup>2</sup>	49%	49%	50%	49%	50%

## 2

Monthly Time Spent (hh:mm)	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017
Watching broadcast TV in the home within 28 days (per person) <sup>3</sup>	90:02	90:16	81:18	79:30	81:25
Watching Live TV	80:22	81:21	72:51	70:52	72:21
Watching Playback to 7 TV	8:03	7:22	6:51	7:04	7:25
Watching Time Shift 8-28 TV	1:36	1:33	1:35	1:33	1:39
Watching online video on desktop, laptop, smartphone or tablet (ppl 18+) <sup>4</sup>	n.a	n.a	n.a	n.a	20:30
Watching online video on desktop/laptop	n.a	n.a	n.a	n.a	7:01
Watching online video on smartphone	n.a	n.a	n.a	n.a	7:44
Watching online video on tablet	n.a	n.a	n.a	n.a	5:45

Watching broadcast TV is an average per person in TV homes, whether or not they watch TV (or how much) in OzTAM and Regional TAM coverage areas.

Watching online video on a desktop, laptop, smartphone or tablet is an average per person among Australians aged 18 and over, whether or not they watch online video or how much.

## 3

Overall Use (000s), Monthly Reach	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017
Watching broadcast TV in the home within 28 days <sup>3</sup>	22,396	22,341	22,244	22,338	22,303
Watching Live TV	22,264	22,204	22,057	22,118	22,051
Watching Playback to 7 TV	12,556	12,642	12,652	12,620	13,012
Watching Time Shift 8-28 TV	9,079	9,169	9,615	9,498	9,887
Watching online video on desktop, laptop, smartphone or tablet (ppl 18+) <sup>4</sup>	n.a	n.a	n.a	n.a	15,476
Watching online video on desktop/laptop	n.a	n.a	n.a	n.a	10,491
Watching online video on a smartphone/ tablet	n.a	n.a	n.a	n.a	12,541

## 4

A Month In The Life   Q2 2017	Kids <sup>5</sup>	Teens <sup>6</sup>	P18-24	P25-34	P35-49	P50-64	P65+	All People
Watching broadcast TV in the home within 28 days (per person) <sup>3</sup>	48:57	27:11	30:12	47:09	80:37	123:05	153:40	81:25
Watching Live TV	43:23	23:48	26:30	41:16	70:37	109:26	138:48	72:21
Watching Playback to 7 TV	4:02	2:38	2:56	4:34	8:15	11:23	12:37	7:25
Watching Time Shift 8-28 TV	1:31	0:43	0:45	1:18	1:44	2:15	2:14	1:39
Watching online video on desktop, laptop, smartphone or tablet (ppl 18+) <sup>4</sup>	n.a.	n.a.	24:59	29:07	26:04	18:25	4:45	20:30
Watching online video on desktop/laptop	n.a.	n.a.	10:41	10:07	8:07	5:34	2:06	7:01
Watching online video on smartphone	n.a.	n.a.	8:12	10:54	10:18	7:23	1:31	7:44
Watching online video on tablet	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	5:45

## Notes:

Fractional minutes have been rounded.

It is not possible to subtract desktop/laptop and smartphone viewing from total online video viewing to derive a figure for viewing on tablets by demographic, as the small sample size makes the demographic figures for tablets statistically unreliable.

## 4A

A Month In The Life By Quarter   <b>KIDS<sup>5</sup></b>	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017
Watching broadcast TV in the home within 28 days <sup>3</sup>	60:18	60:46	52:41	48:08	48:57
Watching Live TV	54:12	54:42	47:13	42:36	43:23
Watching Playback to 7 TV	4:36	4:29	3:55	3:52	4:02
Watching Time Shift 8-28 TV	1:29	1:33	1:31	1:39	1:31

## 4A

A Month In The Life By Quarter   <b>TEENS<sup>6</sup></b>	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017
Watching broadcast TV in the home within 28 days <sup>3</sup>	34:31	35:37	30:59	27:26	27:11
Watching Live TV	30:36	31:49	27:27	24:26	23:48
Watching Playback to 7 TV	3:12	3:04	2:47	2:21	2:38
Watching Time Shift 8-28 TV	0:43	0:43	0:44	0:39	0:43

## 4A

A Month In The Life By Quarter   <b>P18-24</b>	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017
Watching broadcast TV in the home within 28 days <sup>3</sup>	38:50	37:02	30:36	29:39	30:12
Watching Live TV	33:40	32:52	27:03	25:56	26:30
Watching Playback to 7 TV	4:12	3:26	2:54	3:01	2:56
Watching Time Shift 8-28 TV	0:57	0:44	0:38	0:41	0:45
Watching online video on desktop, laptop, smartphone or tablet <sup>4</sup>	n.a	n.a	n.a	n.a	24:59
Watching online video on desktop/laptop	n.a	n.a	n.a	n.a	10:41
Watching online video on smartphone	n.a	n.a	n.a	n.a	8:12
Watching online video on tablet	n.a	n.a	n.a	n.a	n.a

## 4A

A Month In The Life By Quarter   P25-34	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017
Watching broadcast TV in the home within 28 days <sup>3</sup>	58:29	57:29	48:46	46:01	47:09
Watching Live TV	51:08	50:59	42:57	40:34	41:16
Watching Playback to 7 TV	6:00	5:12	4:31	4:16	4:34
Watching Time Shift 8-28 TV	1:20	1:16	1:17	1:09	1:18
Watching online video on desktop, laptop, smartphone or tablet <sup>4</sup>	n.a	n.a	n.a	n.a	29:07
Watching online video on desktop/laptop	n.a	n.a	n.a	n.a	10:07
Watching online video on smartphone	n.a	n.a	n.a	n.a	10:54
Watching online video on tablet	n.a	n.a	n.a	n.a	n.a

## 4A

A Month In The Life By Quarter   P35-49	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017
Watching broadcast TV in the home within 28 days <sup>3</sup>	91:24	91:01	80:04	78:36	80:37
Watching Live TV	80:13	80:54	70:33	68:52	70:37
Watching Playback to 7 TV	9:22	8:24	7:43	8:06	8:15
Watching Time Shift 8-28 TV	1:48	1:43	1:47	1:36	1:44
Watching online video on desktop, laptop, smartphone or tablet <sup>4</sup>	n.a	n.a	n.a	n.a	26:04
Watching online video on desktop/laptop	n.a	n.a	n.a	n.a	8:07
Watching online video on smartphone	n.a	n.a	n.a	n.a	10:18
Watching online video on tablet	n.a	n.a	n.a	n.a	n.a

## 4A

A Month In The Life By Quarter   P50-64	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017
Watching broadcast TV in the home within 28 days <sup>3</sup>	130:28	131:53	120:50	118:32	123:05
Watching Live TV	117:35	119:48	109:12	106:23	109:26
Watching Playback to 7 TV	10:57	10:08	9:34	10:11	11:23
Watching Time Shift 8-28 TV	1:55	1:56	2:02	1:57	2:15
Watching online video on desktop, laptop, smartphone or tablet <sup>4</sup>	n.a	n.a	n.a	n.a	18:25
Watching online video on desktop/laptop	n.a	n.a	n.a	n.a	5:34
Watching online video on smartphone	n.a	n.a	n.a	n.a	7:23
Watching online video on tablet	n.a	n.a	n.a	n.a	n.a



## 4A

A Month In The Life By Quarter   <b>P65+</b>	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017
Watching broadcast TV in the home within 28 days <sup>3</sup>	157:07	158:43	150:21	151:11	153:40
Watching Live TV	142:13	144:40	136:14	136:31	138:48
Watching Playback to 7 TV	12:49	12:04	12:00	12:29	12:37
Watching Time Shift 8-28 TV	2:04	1:58	2:07	2:10	2:14
Watching online video on desktop, laptop, smartphone or tablet <sup>4</sup>	n.a	n.a	n.a	n.a	4:45
Watching online video on desktop/laptop	n.a	n.a	n.a	n.a	2:06
Watching online video on smartphone	n.a	n.a	n.a	n.a	1:31
Watching online video on tablet	n.a	n.a	n.a	n.a	n.a

## 4A

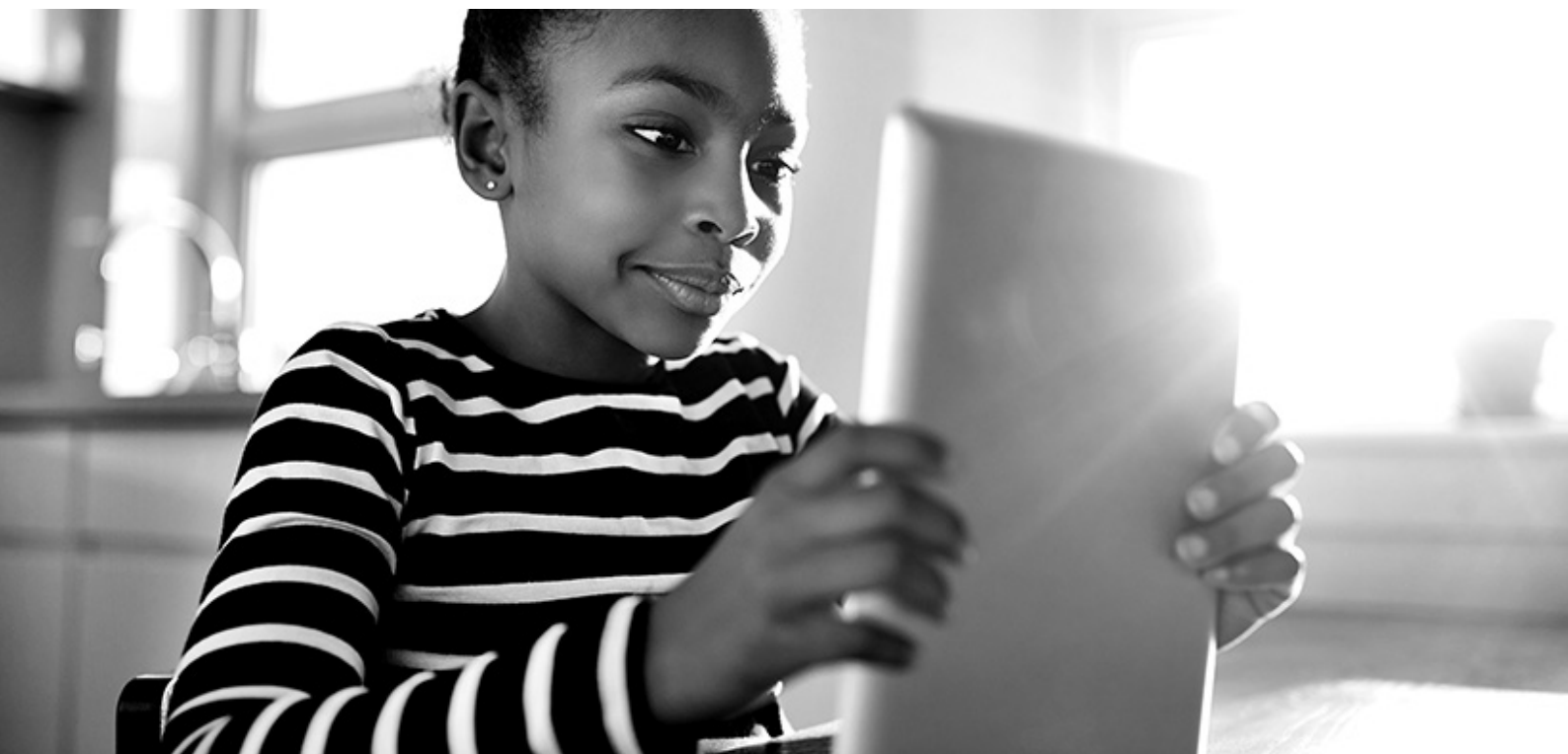
A Month In The Life By Quarter   <b>ALL PEOPLE</b>	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017
Watching broadcast TV in the home within 28 days <sup>3</sup>	90:02	90:16	81:18	79:30	81:25
Watching Live TV	80:22	81:21	72:51	70:52	72:21
Watching Playback to 7 TV	8:03	7:22	6:51	7:04	7:25
Watching Time Shift 8-28 TV	1:36	1:33	1:35	1:33	1:39
Watching online video on desktop, laptop, smartphone or tablet (ppl 18+) <sup>4</sup>	n.a	n.a	n.a	n.a	20:30
Watching online video on desktop/laptop	n.a	n.a	n.a	n.a	7:01
Watching online video on smartphone	n.a	n.a	n.a	n.a	7:44
Watching online video on tablet	n.a	n.a	n.a	n.a	5:45

# Key to data sources

	<b>OzTAM and Regional TAM:</b> Broadcast TV on in-home TV sets	<b>OzTAM VPM:</b> Online TV on connected devices	<b>Nielsen Digital Content Ratings (DCR):</b> Online video on computers, smartphones and tablets
<b>How measured</b>	Electronic people meters attached to every TV set in representative panels of homes.	Software Development Kit (SDK) plus embedded media IDs in broadcasters' video player library content.	Software Development Kit (SDK) tag for volume; third-party datasets calibrated to panels for audience.
<b>Who measured</b>	Viewing by individuals in panel homes extrapolated to estimates per person across the population in OzTAM and Regional TAM coverage areas, regardless of whether people watch TV or not.	All devices playing participating broadcasters' online content.	Australians 18+ who have streamed video online, extrapolated to estimates per person across the Australian national population 18+, irrespective of whether they streamed or not.
<b>Captures</b>	Broadcast TV: live + playback through TV set within seven days + time-shifted viewing between eight and 28 days.	Census level online broadcast TV viewed on a connected device.	Any online streamed video viewed on desktop, laptop, smartphone and tablet. Excludes adult and advertising material and downloaded content.

# Footnotes

1. DTT, PVR estimates are based on install levels from the combined OzTAM Metro and Regional TAM panels as at last date of each period.
2. Estimates for internet connection, smartphone in home, tablet household penetration and internet capable TV in home are from combined OzTAM Metro and Regional TAM quarterly Establishment Surveys (ES). Based on mobile and landline CATI ES. Internet connection and tablet penetration are based on rolling four-quarter averages to stabilise month-to-month trends. Estimate for internet capable TV in home refers to the capability to be internet connected, whether connected or not. Smartphone estimates are percentage of homes with at least one smartphone.
3. Consolidated 28 combined OzTAM Metro and Regional TAM databases with overlap homes de-duplicated. Average time spent viewing [ATV 0200-2600 (2am- 2am)] across the population in TV homes within metered markets. Includes free-to-air and subscription television viewing. Fractional minutes have been rounded.
4. Nielsen Digital Content Ratings (DCR) are for people 18+ among the total Australian population. Data for Q2 2017 is for the months of May and June only due to data availability in the quarter. Online video refers to streaming video and excludes downloaded content as well as adult and advertising content. Demographic breakdowns for tablet device viewing are not available due to limited sample size. Note that differences in methodology between DCR and Nielsen Online Ratings (NOR) Hybrid Streaming data (which was used historically in the Australian Video Viewing Report and its predecessor, the Multi-Screen Report) mean comparisons with figures in earlier reports cannot be made.
5. Combined OzTAM Metro and Regional TAM data defines 'Kids' aged 0-12.
6. Combined OzTAM Metro and Regional TAM data defines 'Teens' aged 13-17.



# Explanatory notes

- ‘Other TV screen use’ is TV screen use that excludes live and playback viewing of broadcast television within 28 days of the original broadcast time. Such activity can include gaming; viewing TV network catch up services; watching DVDs; playing back recorded broadcast material beyond 28 days; internet browsing; streaming music; watching video on platforms such as YouTube, Facebook or Vimeo; and watching over-the-top internet delivered video (SVOD) services.
- Time bands cited use the standard 26-hour TV clock. 0200-2600 is 2am-2am; 1800-2400 is 6pm-midnight.
- Average time spent viewing (ATV) is calculated as daily average time (0200-2600) in TV homes within OzTAM and Regional TAM coverage areas across all days in the calendar quarter multiplied by the number of days in the quarter divided by three (3). Fractional minutes have been rounded.
- Monthly reach for TV is based on the average of the calendar month cumulative 1-minute reach audience (0200-2600) within the quarter.
- Watching online video on desktop, laptop, smartphone or tablet is from Nielsen Digital Content Ratings (DCR) for May-June 2017 and measures online video activity of people 18+ within the total Australian population. Online video viewing is measured using metered panel-based data from PC and mobile panels, as well as tagged data from Nielsen’s Software Development Kit (SDK) where implemented. Video content is defined as a user-requested stream that is in-view on the device with both audio and video detected and viewed for at least 1 second. Figures include broadcast (e.g. TV network catch-up and live-streamed services) and non-broadcast content (e.g. YouTube, Facebook, subscription video on demand, or SVOD, services) viewed on desktops, laptops, smartphones and tablets and excludes online video content viewed on connected TVs. Video viewership refers to streaming video and excludes downloaded content as well as adult and advertising content.
- OzTAM’s VPM Report captures minute-by-minute viewing of participating broadcasters’ online ‘catch up TV’ and live-streamed content played to connected devices such as tablets, smartphones, smart TVs, games consoles and desktops/laptops.

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