



FACT PACK

July - December 2018 Edition

THE STATE OF PLAY



OVERVIEW: JULY - DECEMBER 2018

73H 51MIN

Average Monthly Time Spent Viewing Per Person (Broadcast TV viewing on in-home TV sets)

RATINGS PANEL

Weekly Average Cume Reach %
(Broadcast TV viewing on in-home TV sets)



Monthly Average Cume Reach %
(Broadcast TV viewing on in-home TV sets)



Live/As-live %
(Broadcast TV viewing on in-home TV sets watched live or as-live)



Time shift % (Broadcast TV viewing on in-home TV sets played back after research day of broadcast)



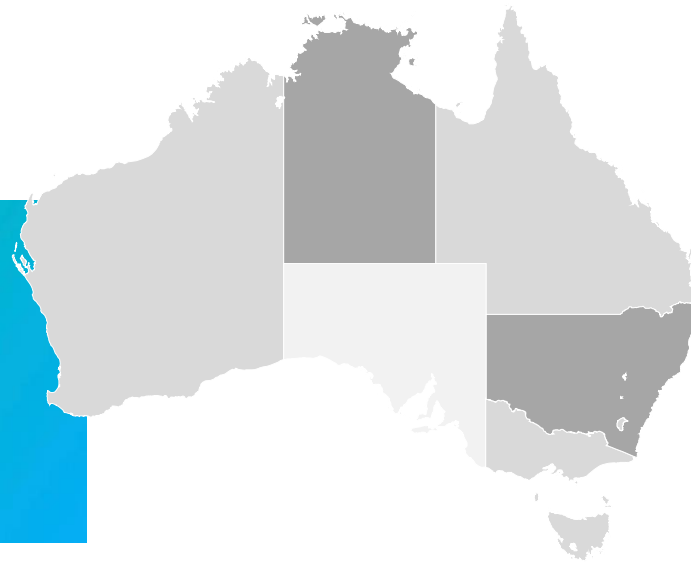
Source: OZTAM and Regional TAM databases. Total People, Average 1-minute cumulative reach for the stated period. July to December 2018. Includes live viewing and playback through the TV set at the time it is watched within 28 days. Time bands use the industry standard 26-hour clock.: 0200-2600 (2am - 2am) As-live is viewing of recorded broadcast TV content that occurs within the same research day but viewed at a later time than the original broadcast. Time shift is playback viewing after the research day of broadcast and up to 28 days from broadcast

GLOBAL COMPARISONS

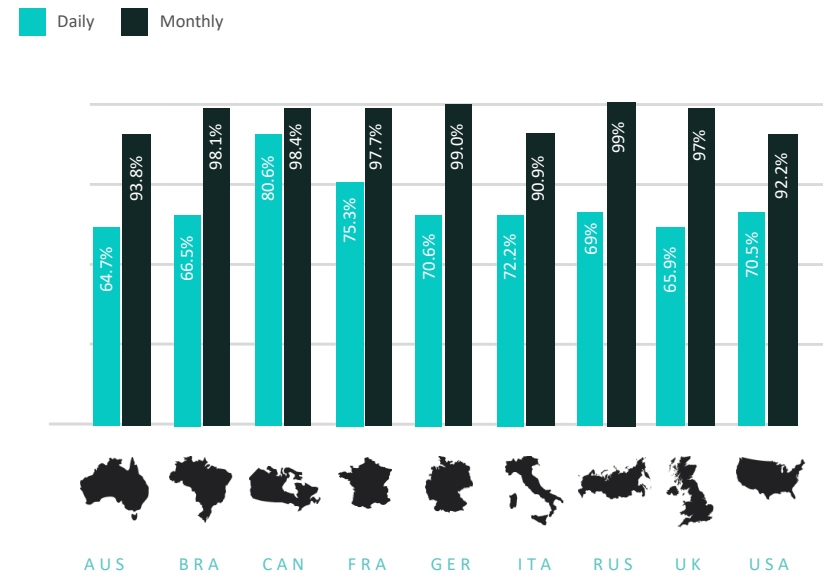
Data collated by The Global TV Group show that linear TV reaches 96.2% of individuals in key markets each month, and 70.6% each day on average.

The global forecast for 2019 is that demand for linear TV inventory will remain high and Broadcaster Video On Demand (BVOD) will continue to grow as a percentage of broadcaster total ad revenue. Australia will mimic other markets with rapid double-digit BVOD growth.

In Australia, reach across the back half of 2018 was strong, along with a corresponding demand for ad inventory from advertisers.

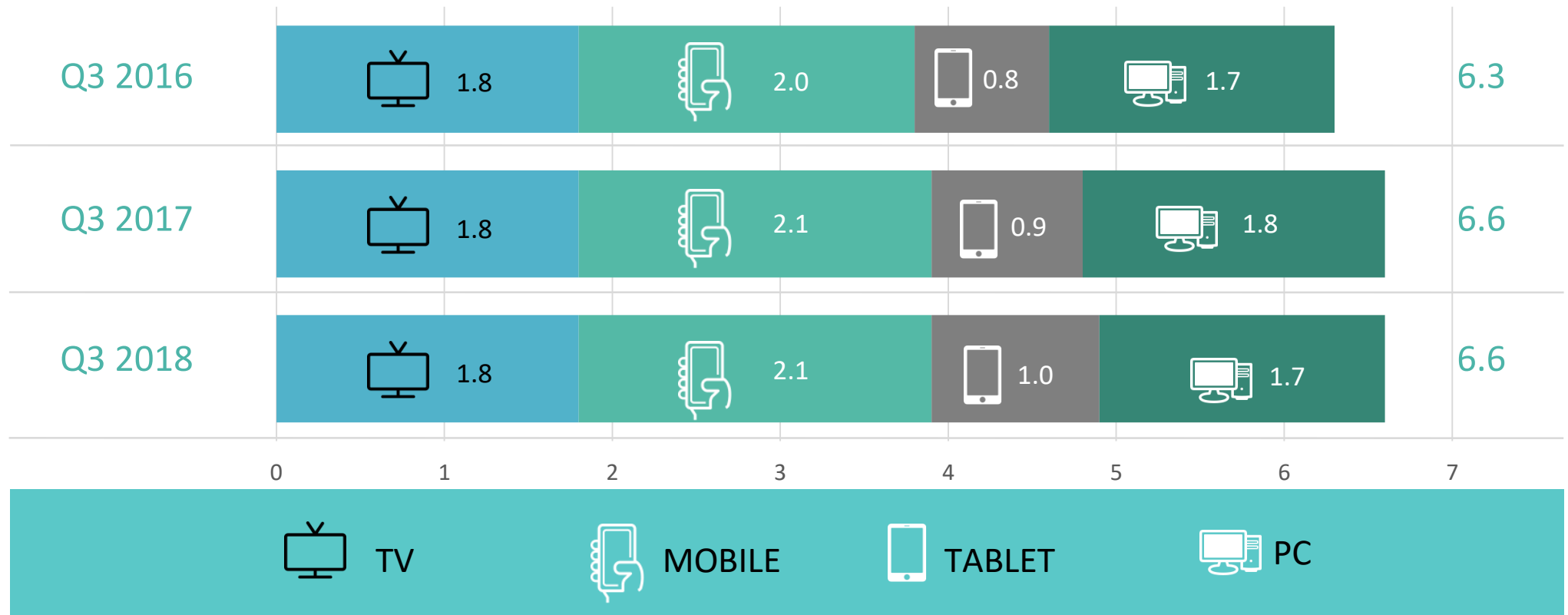


KEY MARKETS, TV DAILY AND MONTHLY REACH 2017/18



Note: Definitions of sample and reach vary by local market.

SCREENS PER HOUSEHOLD



TECHNOLOGY PENETRATION

	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018
TV HOUSEHOLDS THAT RECEIVE DTT ON EVERY WORKING TV SET	98%	98%	98%	98%	98%
TV HOUSEHOLDS THAT RECEIVE HD DTT ON EVERY WORKING TV SET	97%	97%	97%	98%	98%
PERSONAL VIDEO RECORDER (PVR): PENETRATION WITHIN TV HOUSEHOLDS	58%	58%	58%	58%	57%
2+ PVR: PENETRATION WITHIN TV HOUSEHOLDS	17%	17%	17%	17%	17%
INTERNET CONNECTION: HOUSEHOLD PENETRATION	80%	80%	82%	84%	85%
INTERNET CAPABLE TV IN THE HOME	42%	43%	44%	46%	48%
ESTIMATED INCIDENCE OF CONNECTED SMART TVs	29%	31%	31%	33%	36%
INCIDENCE OF CONNECTED TV AMONGST HHs WITH SMART TVs	68%	72%	71%	72%	74%
1+ SMARTPHONE: HOUSEHOLD PENETRATION	83%	84%	83%	84%	84%
TABLETS: HOUSEHOLD PENETRATION	50%	50%	53%	55%	58%

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

DTT, PVR estimates are based on install levels from the combined OzTAM Metro and Regional TAM panels as at last date of each period.

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. Internet connection and tablet penetration 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.

TIME SPENT: IN-HOME BROADCAST TV CONSUMPTION

MONTHLY TIME SPENT

	Q3 2017 HH:MM	Q3 2018 HH:MM
TOTAL BROADCAST TV ON IN-HOME TV SETS	80:00	73:51
WATCHING TV LIVE	71:08	65:06
WATCHING TV PLAYBACK TO 7	7:18	7:00
WATCHING TV PLAYBACK 8-28	1:34	1:44

Source: Consolidated 28 day 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.

TIME SPENT: QUARTERLY TREND

MONTHLY TIME SPENT

	Q4 2017 HH:MM	Q1 2018 HH:MM	Q2 2018 HH:MM	Q3 2018 HH:MM
TOTAL BROADCAST TV ON IN-HOME TV SETS	74:58	73:50	75:42	73:51
WATCHING TV LIVE	66:38	65:34	66:57	65:06
WATCHING TV PLAYBACK TO 7	6:37	6:39	7:03	7:00
WATCHING TV PLAYBACK 8-28	1:42	1:37	1:41	1:44

Source: Consolidated 28 day 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.

TIME SPENT BY DEMO

MONTHLY TIME SPENT (Q3 2018)

Q3 2018 HH:MM	KIDS*	TEENS**	P18-24	P25-34	P35-49	P50-64	P65+	ALL PEOPLE***
TOTAL BROADCAST TV ON IN-HOME TV SETS	40:02	21:06	25:36	39:11	70:50	114:02	150:24	73:51
WATCHING TV LIVE	34:29	18:14	22:09	33:43	61:37	100:49	135:19	65:06
WATCHING TV PLAYBACK TO 7	3:37	2:08	2:42	4:09	7:22	10:58	12:47	7:00
WATCHING TV PLAYBACK 8-28	1:56	0:44	0:45	1:17	1:50	2:14	2:16	1:44

* KIDS - 0 - 12

**TEENS - 13 -17

***ALL PEOPLE - 0+

Source: Consolidated 28 day 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.

REACH: QUARTERLY TREND

MONTHLY REACH

	Q4 2017	Q1 2018	Q2 2018	Q3 2018
TOTAL BROADCAST TV ON IN-HOME TV SETS	22.14m	22.23m	22.22m	21.97m
WATCHING TV LIVE	21.82m	21.88m	21.84m	21.53m
WATCHING TV PLAYBACK TO 7	13.08m	12.93m	13.28m	13.42m
WATCHING TV PLAYBACK 8-28	10.50m	10.28m	10.67m	10.90m

Source: OZTAM and Regional TAM databases with overlap home 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 clock: 0200-2600 (2am - 2am); 1800-2400 (6pm -midnight)

REACH BY DEMO

WEEKLY REACH (Q3 2018)

	ALL PEOPLE	KIDS	TEENS	P18-24	P25-39	P40-54	P55-64	P65+
0200 - 2600								
REACH %	78.7	76.7	61.9	57.7	72.3	86.5	89.5	91.2
WEEKLY AVERAGE CUME REACH	18.86m	3.03m	0.88m	1.28m	3.78m	4.04m	2.48m	3.37m
1800 - 2400								
REACH %	73.9	65.1	55.3	51.5	67.3	84.1	87.7	90.1
WEEKLY AVERAGE CUME REACH	17.7m	2.58m	0.78m	1.15m	3.52m	3.93m	2.43m	3.33m

Source: OZTAM and Regional TAM databases with overlap home 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 clock: 0200-2600 (2am - 2am); 1800-2400 (6pm -midnight)

A man and a woman are sitting on a light-colored couch. The man is in the background, smiling, and the woman is in the foreground, also smiling and looking towards the left. They appear to be watching something together.

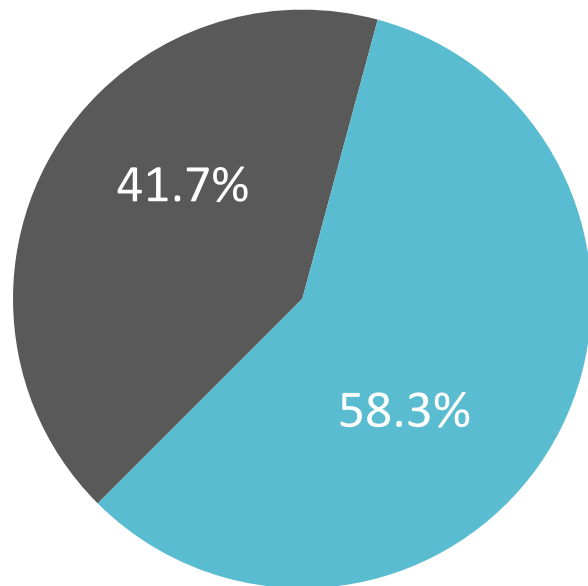
CO-VIEWING

Humans are naturally social and want to share their experiences, thoughts and feelings. An often overlooked benefit of live television viewing is that it is often a shared experience.

TV fosters emotional connections and nothing entrenches those connections better than conversations with friends or family. For the purpose of this deep-dive, co-viewing is defined as watching video content with others on linear TV.

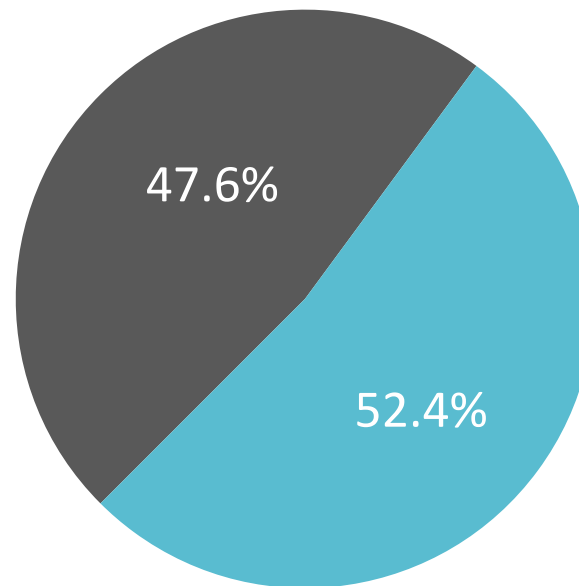
PROPORTION OF VIEWING : CO-VIEWING VS SOLUS VIEWING

ALL DAY



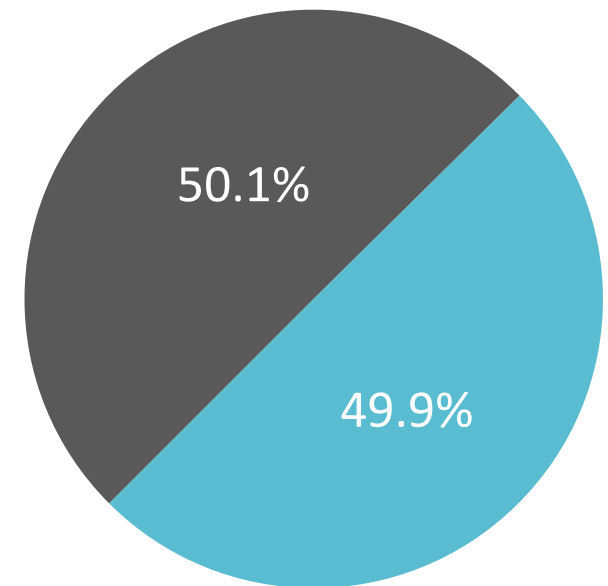
 CO-VIEWING  SOLUS VIEWING


1800-2400



 CO-VIEWING  SOLUS VIEWING

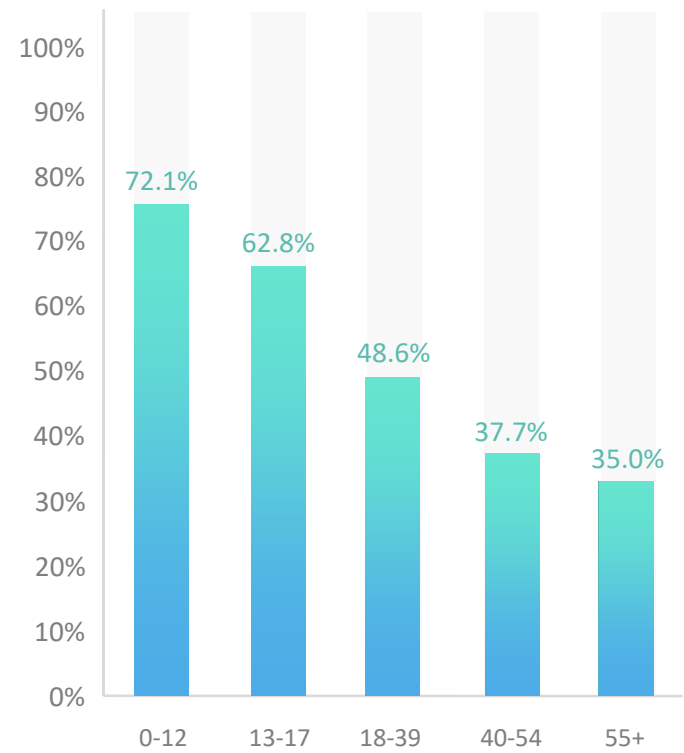
1930-2100



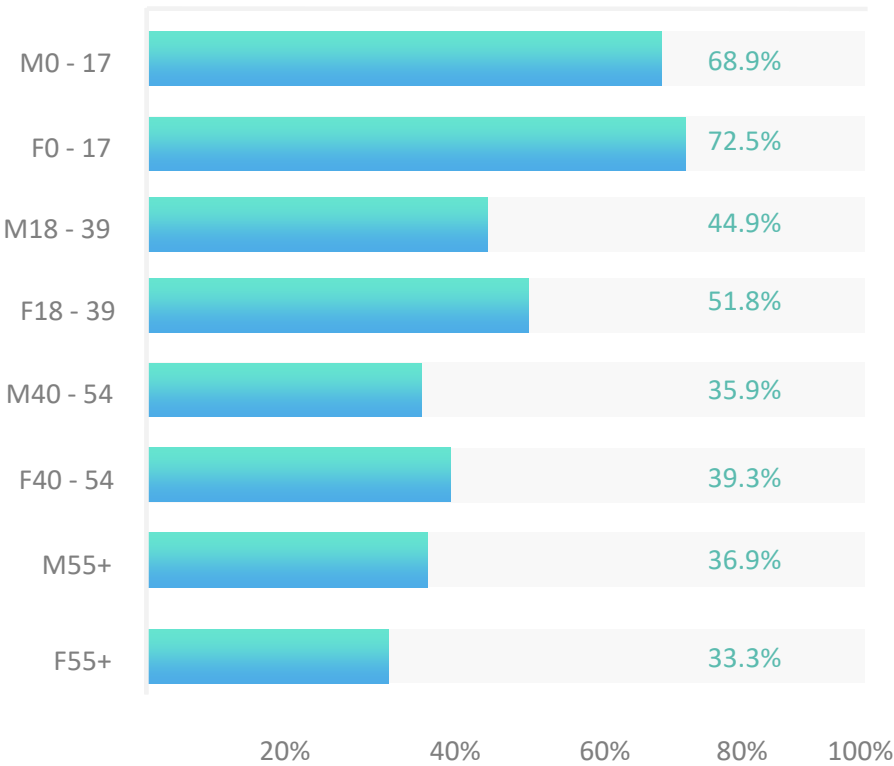
 CO-VIEWING  SOLUS VIEWING

CO-VIEWING BY AGE AND GENDER

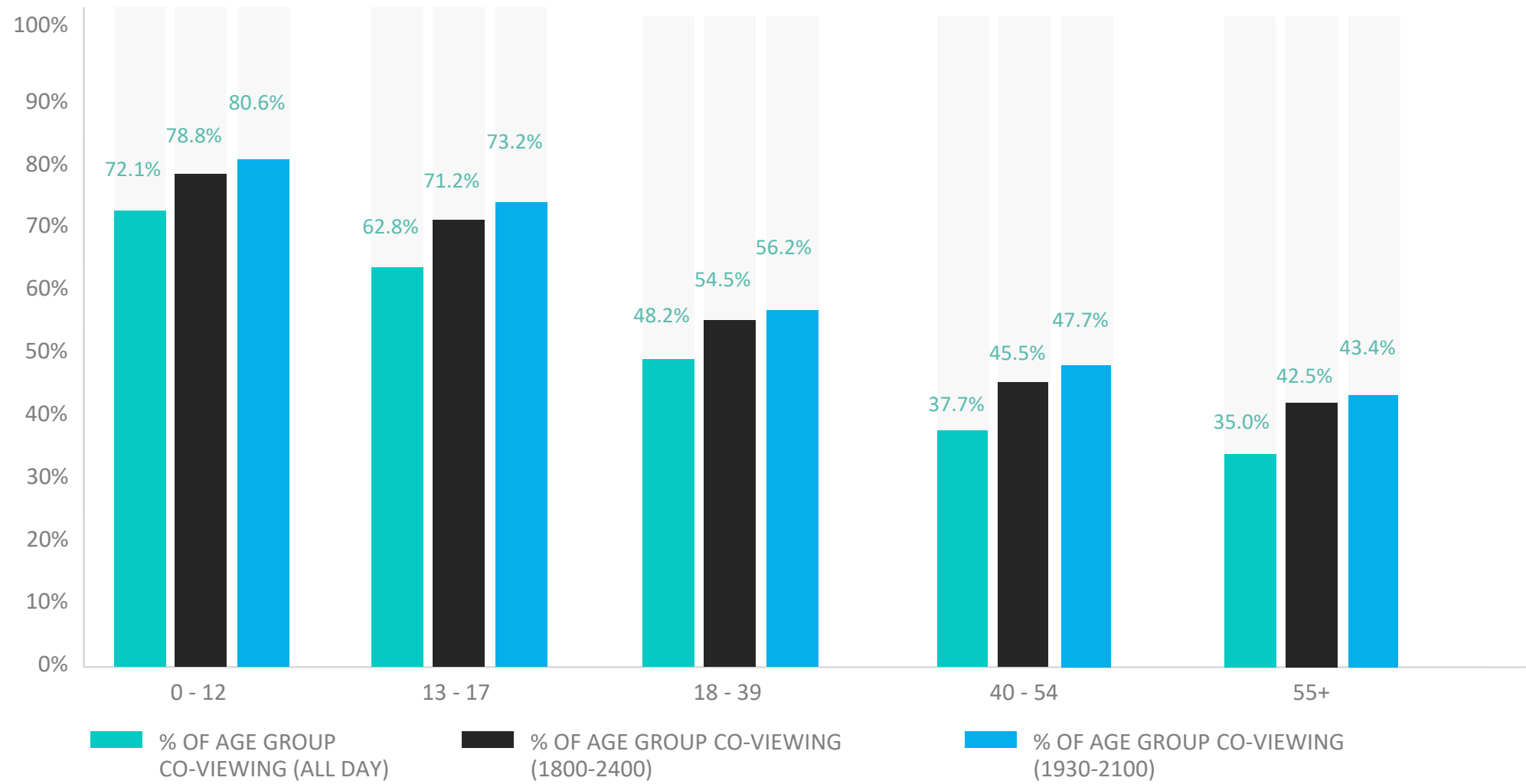
% OF AGE GROUP WHO CO-VIEW



% OF AGE GROUP WHO CO-VIEW

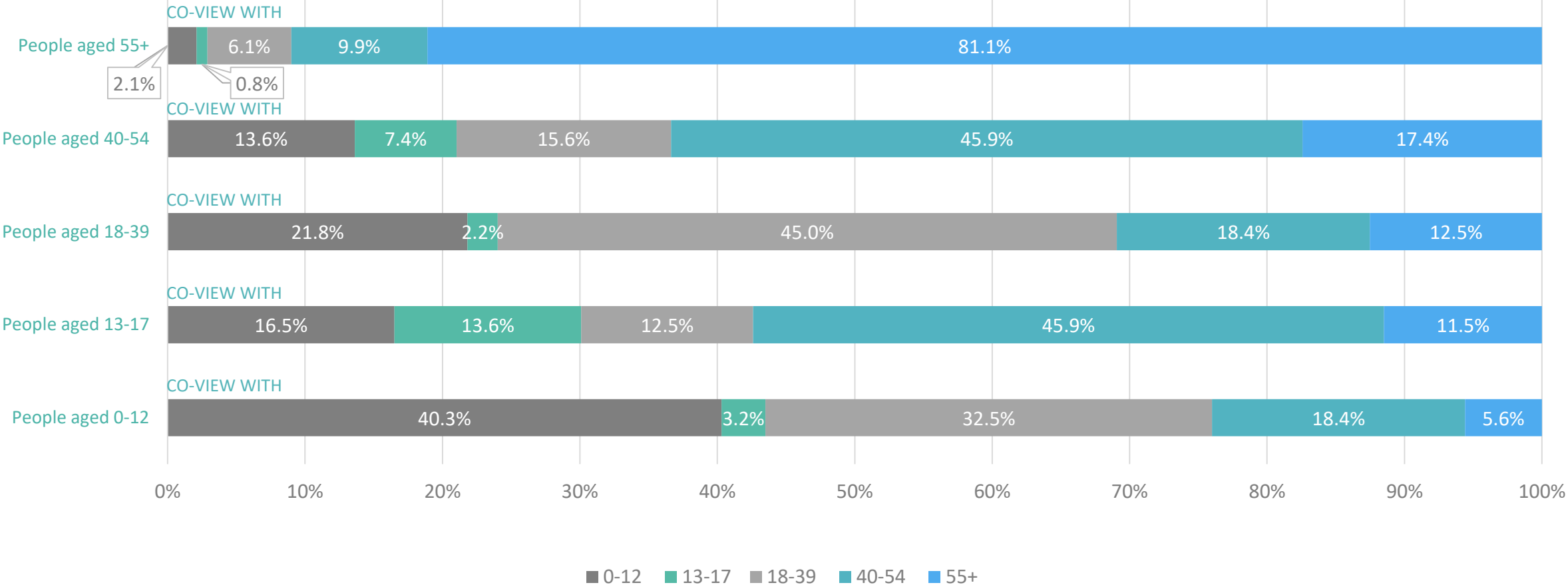


CO-VIEWING BY TIME BAND



Source: OzTAM METSTV 0200-2600 | Co-viewing % of listed time band. | All Day 0200-2600, 1800-2400, 1930-2100 | 1 Jan - 5 Dec 2018

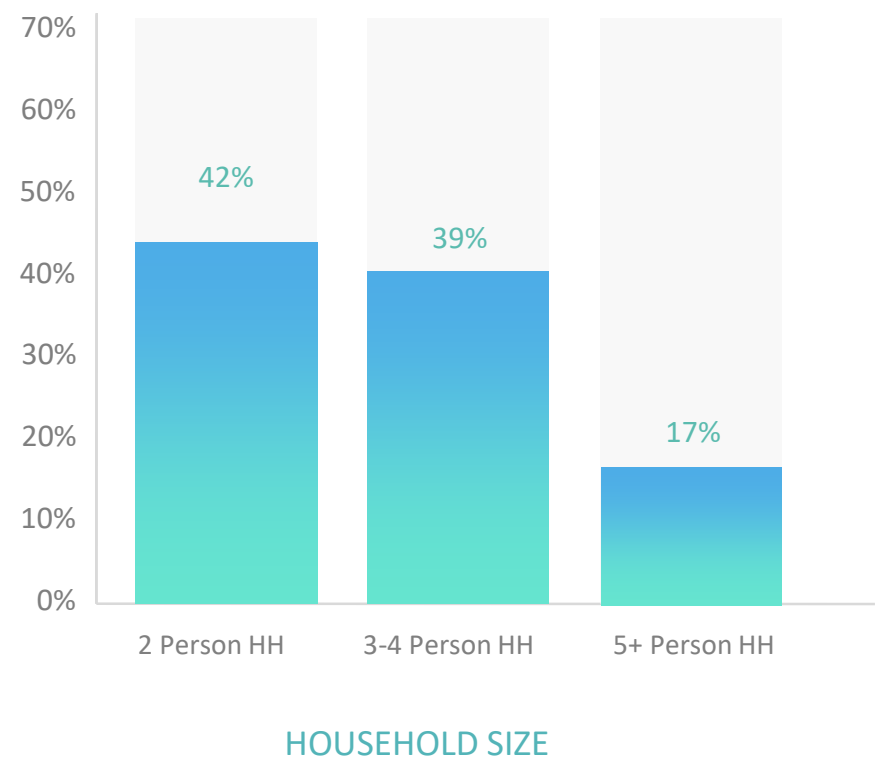
WHO DO PEOPLE CO-VIEW WITH?



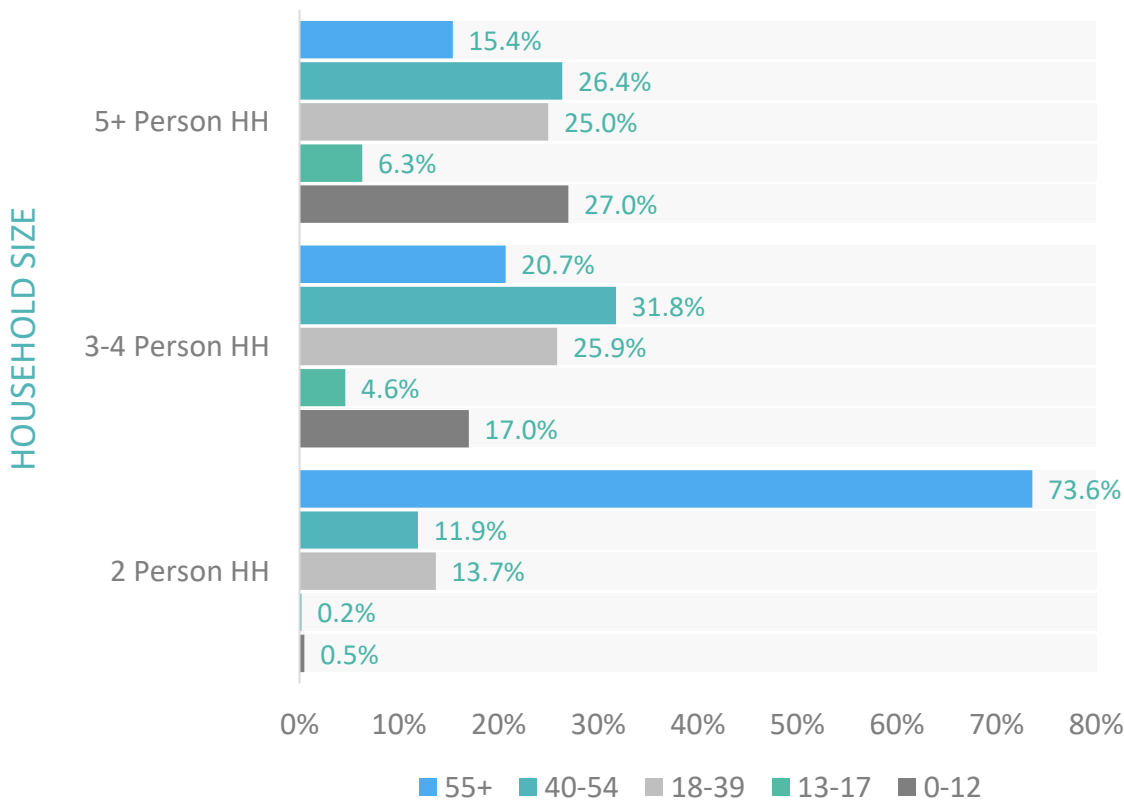
Source: OzTAM METSTV 0200–26h00 Co-viewing % of listed demographic universe 1 Jan-5 Dec 18

CO-VIEWING HOUSEHOLD PROFILE

HOUSEHOLD PROFILE OF CO-VIEWERS *



CO-VIEWING PROFILE BY SIZE OF HOUSEHOLD



Source: OzTAM METSTV 0200-2600 Co-viewing % of listed demographic universe 1 Jan-5 Dec 18
* Guest co-viewing in 1 person Household excluded from chart.



0-12

CHILDRENS
PROGRAM



+55

NEWS, DRAMA,
DOCUMENTARIES



What is being
co-viewed?



13-17

SPORT,
REALITY,
MOVIES



40-54

REALITY,
COMEDIES,
MOVIES



<40

CHILDRENS
PROGRAMS;
REALITY

CO-VIEWING AND SOCIALISATION

Whether it's talking to your family while viewing, or sharing reactions on your socials, the very nature of advertising in and around socialised content ensures ad dollars work harder and longer.



Twitter



Instagram



Facebook

Ad-supported TV content fosters emotional connections that lead to social engagement, and across 2018, 46.6% of people who tweeted about a brand, were also tweeting about TV programs.

TWITTER USERS WHO ARE TV 'SUPERFANS'

SOCIAL PLATFORM

72% say a social platform, like Twitter, plays a role in their TV viewing.

SHARE

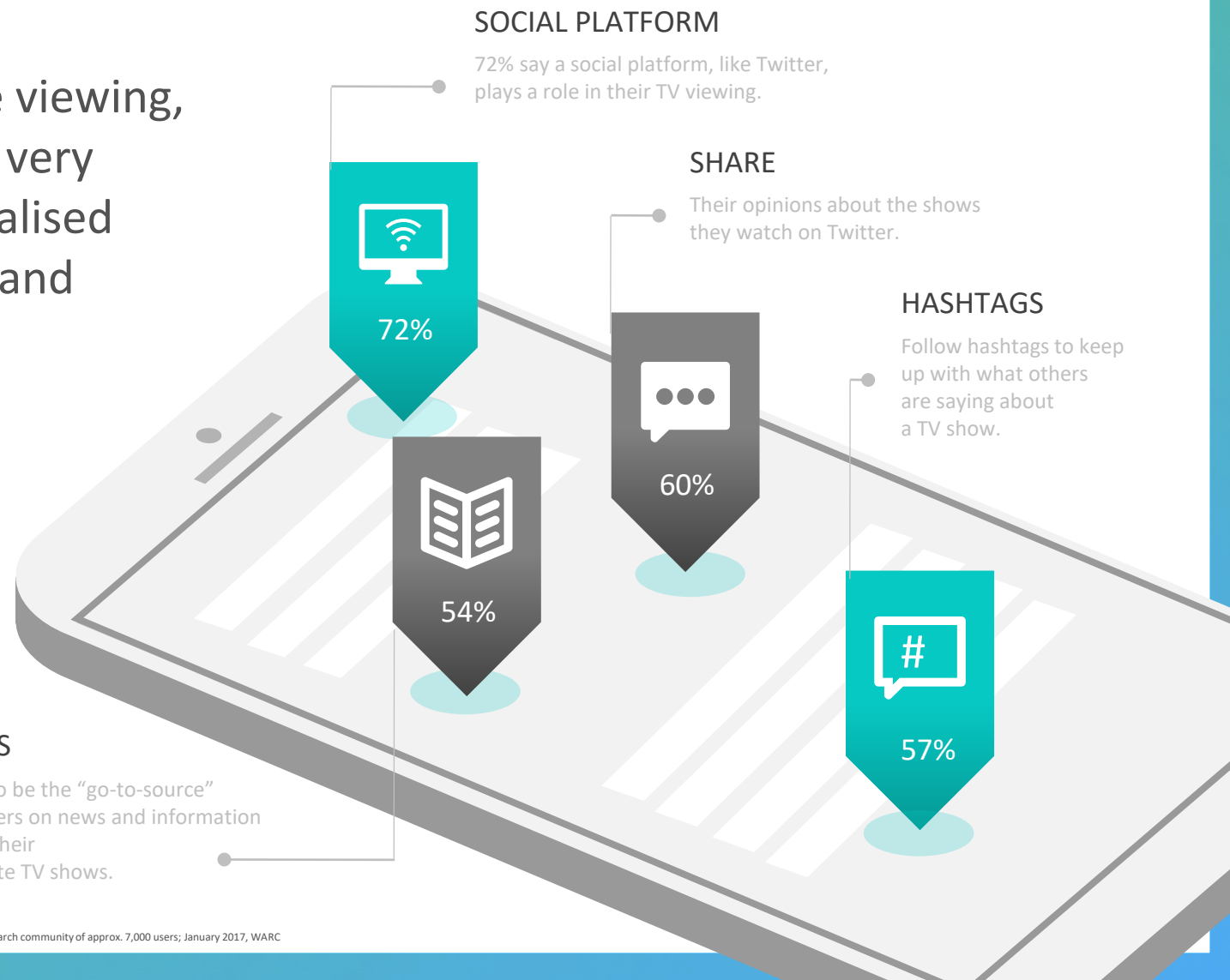
Their opinions about the shows they watch on Twitter.

HASHTAGS

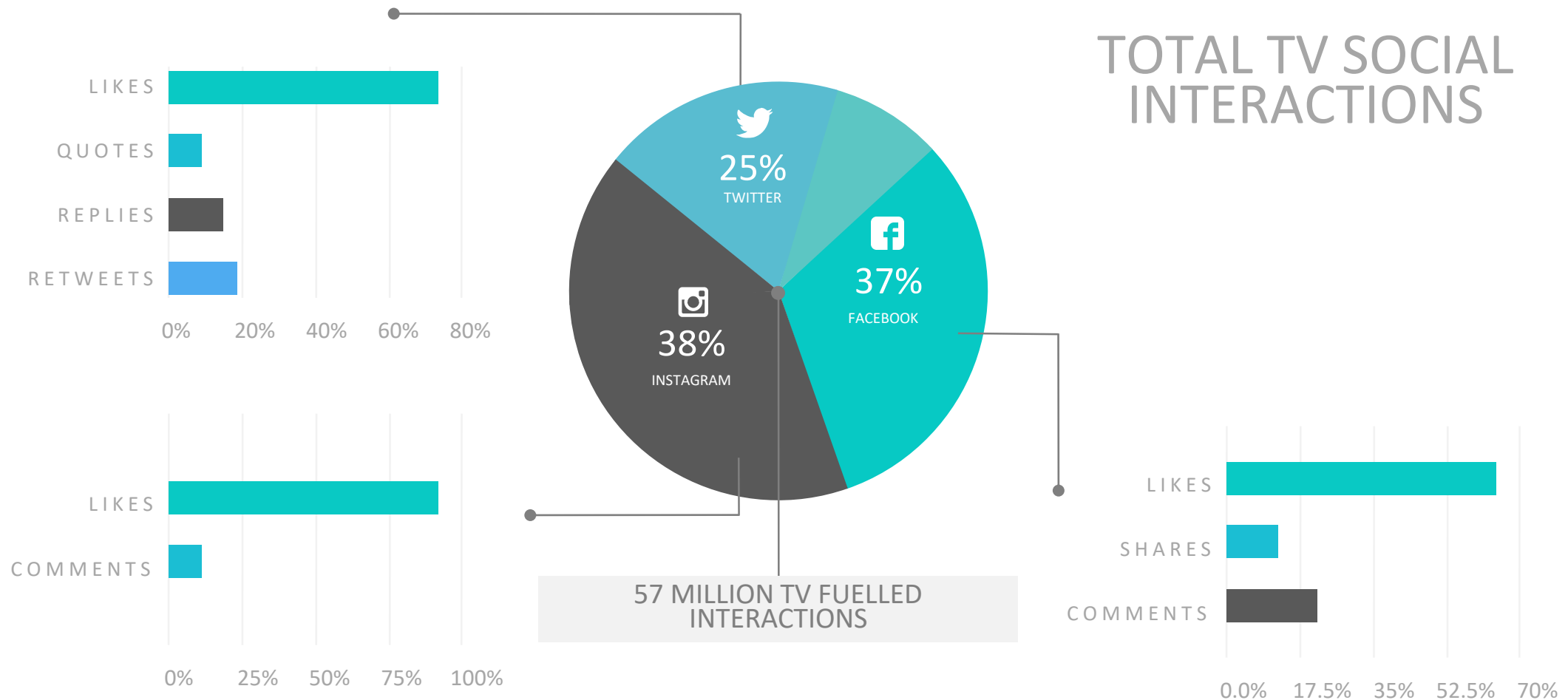
Follow hashtags to keep up with what others are saying about a TV show.

NEWS

Want to be the "go-to-source" for others on news and information about their favourite TV shows.



SOCIAL TV IN 2018



SOCIALISED CONTENT JUL-DEC 2018

TOP TEN PROGRAMS

Rank	Network	Episode	Date	Total Interactions
1	SEVEN	GF: West Coast v Collingwood	29/09/2018	1,333,305
2	7MATE	2018 AFL Brownlow Medal	24/09/2018	827,241
3	7MATE	PF#1 Richmond v Collingwood	21/09/2018	504,866
4	NINE	NRL Grand Final - Melbourne Storm v Sydney Roosters	30/09/2018	504,104
5	FOXFOOTY	PF#1 Richmond v Collingwood	21/09/2018	477,891
6	7MATE	PF#2 West Coast v Melbourne	22/09/2018	448,856
7	FOXCRICKET	AUS v IND 3rd Test Day 5	30/12/2018	432,112
8	7MATE	Qual Final: West Coast V Collingwood	08/09/2018	426,699
9	FOXFOOTY	PF#2 West Coast v Melbourne	22/09/2018	421,392
10	FOXCRICKET	AUS v IND 2nd Test Day 3	16/12/2018	419,184

SOCIALISED CONTENT JUL-DEC 2018

NON-SPORT TOP TEN

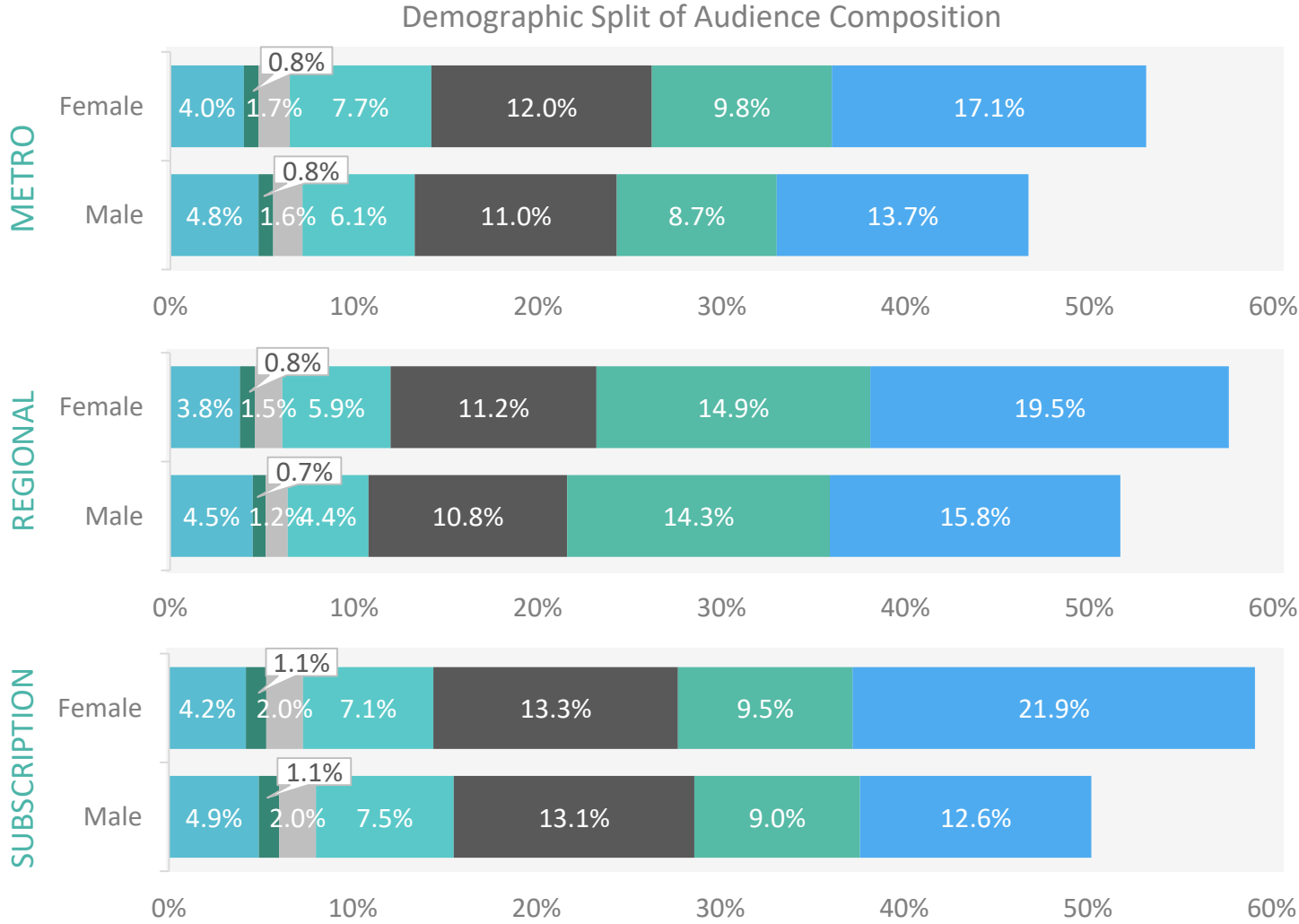
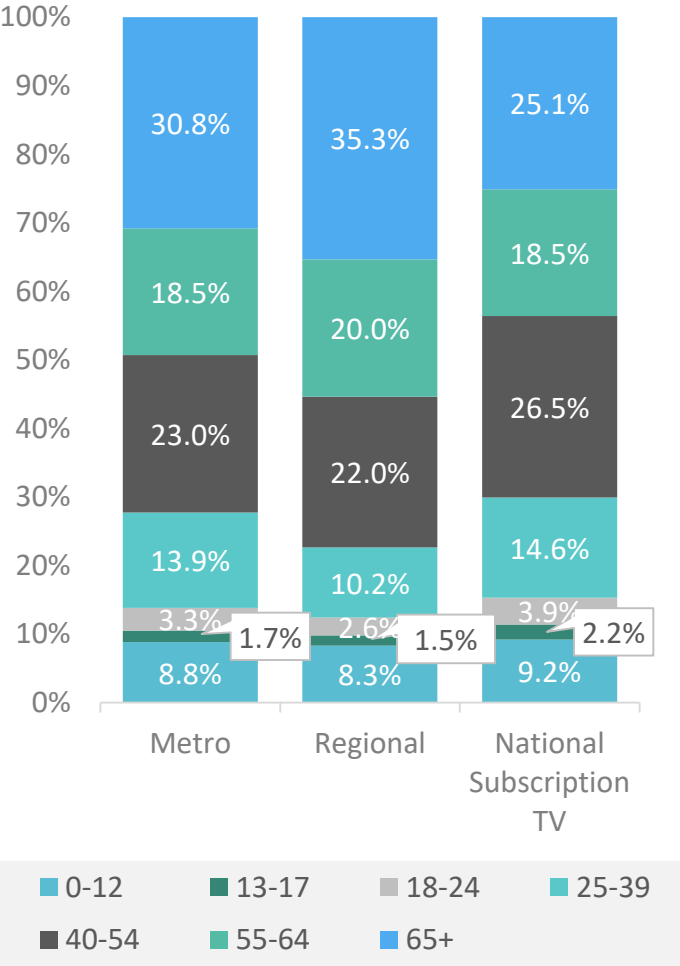
Rank	Network	Episode	Date	Total Interactions
85	10	The Bachelor Australia	04/10/2018	142,483
116	10	The Bachelor Australia	05/09/2018	120,265
120	10	The Bachelorette Australia	15/11/2018	117,532
121	NINE	The Block- Auction	28/10/2018	117,449
131	10	The Bachelor Australia	06/09/2018	108,469
157	NINE	2018 ARIA Awards	28/11/2018	98,028
170	NINE	60th Annual TV Week Logie Awards	01/07/2018	92,160
236	NINE	The Block- Terrace Reveal	07/10/2018	69,402
240	10	The Bachelor Australia	15/08/2018	68,902
254	10	Australian Survivor	09/10/2018	65,108

IN-HOME LINEAR TV: WHO IS WATCHING?

Jul - Dec 2018



WHO WATCHES LINEAR TV?



Source: OZTAM and Regional TAM Viewing to Total TV 0200-2600, Consolidated 28 data, Jul to December 2018.

WHO WATCHES METRO LINEAR TV?

METRO TV H2 2018 (0200-2600)	Total Ppl	Kids & Teens	Ppl 16-39	Ppl 25-54	GBCH	Shopper with Child	Men	Women
Audience	1,570,000	164,000	280,000	578,000	168,000	270,000	734,000	836,000
TARP %	9.1	4.3	4.6	7.9	9.1	8.2	8.6	9.6
Av Daily Reach % 1min	59.4%	48.8%	42.6%	57.6%	64.1%	60.4%	57.8%	61%
Average Time Viewed (Univ)/Day	2:11	1:01	1:06	1:53	2:11	1:58	2:04	2:18
Average Age	51	7	30	42	44	44	50	52
Profile	100.0%	10.5%	17.9%	36.8%	10.9%	17.5%	46.8%	53.2%

WHO WATCHES REGIONAL LINEAR TV?

REGIONAL TV H2 2018 (0200-2600)	Total Ppl	Kids & Teens	Ppl 16-39	Ppl 25-54	GBCH	Shopper with Child	Men	Women
Audience	843,000	83,000	113,000	271,000	83,000	124,000	396,000	446,000
TARP %	10.8	4.7	5	9.2	9.3	8.5	10.2	11.3
Av Daily Reach % 1min	62%	48.3%	42.4%	60.1%	61.4%	58.4%	60.3%	63.7%
Average Time Viewed (Univ)/Day	02:35	01:08	01:11	02:13	02:14	02:02	02:27	02:43
Average Age	53	7	30	43	44	44	53	54
Profile	100.0%	9.8%	13.4%	32.2%	10.0%	15.0%	47.0%	53.0%

Source: Regional TAM Regional FTA+WA Combined Agg Markets Viewing to Total TV, 0200-2600, Consolidated 28 data, July to December 2018

WHO WATCHES SUBSCRIPTION LINEAR TV?

SUBSCRIPTION TV H2 2018 (0200-2600)	Total Ppl	Kids & Teens	Ppl 16-39	Ppl 25-54	GBCH	Shopper with Child	Men	Women
Audience	918,000	108,000	159,000	349,000	115,000	179,000	449,000	469,000
TARP %	11.8	5.6	7	11.4	12.4	11.2	11.5	12.1
Av Daily Reach % 1min	69.7%	57.2%	55.1%	71.8%	75.3%	71.4%	68.8%	70.5%
Average Time Viewed (Univ)/Day	2:50	1:21	1:40	2:43	2:58	2:42	2:46	2:54
Average Age	50	7	30	43	44	44	49	50
Profile	100.0%	11.8%	17.3%	38.0%	12.8%	19.9%	48.9%	51.1%

IN-HOME LINEAR TV: HOW MANY?

Jul - Dec 2018



HOW MANY AUSTRALIANS VIEW LINEAR TV?

METRO



10.25 million Australians in a day
59.4% of the metro population.



13.80 million Australians in a week
80% of the metro population.



15.78 million Australians in a month
91.5% of the metro population.

HOW MANY AUSTRALIANS VIEW LINEAR TV?

REGIONAL



4.84 million Australians in a day
62% of the regional population.



6.35 million Australians in a week
81.3% of the regional population.



7.19 million Australians in a month
92% of the regional population.

HOW MANY AUSTRALIANS VIEW LINEAR TV?

NATIONAL SUBSCRIPTION



5.44 million Australians in a day
69.7% of the Subscription TV universe.



6.80 million Australians in a week
87.4% of the Subscription TV universe.



7.45 million Australians in a month
95.7% of the Subscription TV universe.

HOW MANY AUSTRALIANS DOES LINEAR TV REACH WEEKLY?

AVERAGE WEEKLY CUME REACH 000S

000s	Total Ppl	Kids & Teens	Ppl 16-39	Ppl 25-54	GBCH	Shopper with Child	Men	Women
Metro	13,802	2,906	4,179	5,865	1,596	2,755	6,732	7,069
Regional	6,350	1,299	1,544	2,406	755	1,207	3,097	3,253
National Subscription TV	6,786	1,584	1,787	2,741	872	1,445	3,373	3,413

AVERAGE WEEKLY CUME REACH %

%	Total Ppl	Kids & Teens	Ppl 16-39	Ppl 25-54	GBCH	Shopper with Child	Men	Women
Metro	80.0%	75.4%	68.7%	79.7%	86.1%	83.7%	78.9%	81.2%
Regional	81.3%	73.6%	67.9%	82.0%	84.8%	82.8%	80.0%	82.5%
National Subscription TV	87.4%	81.9%	78.6%	89.2%	93.5%	91.0%	86.4%	87.9%

IN-HOME LINEAR TV: HOW LONG?

Jul - Dec 2018



HOW LONG DO AUSTRALIANS SPEND WITH TV EACH DAY?

TOTAL TV VIEWING - JULY TO DECEMBER 2018 (HH:MM)

	Total Ppl	Kids & Teens	Ppl 16-39	Ppl 25-54	GBCH	Shopper with Child	Men	Women
Metro	02:11	01:01	01:06	01:53	02:11	01:58	02:04	02:18
Regional	02:35	01:08	01:11	02:13	02:14	02:14	02:02	02:27
National Subscription TV	02:50	01:20	01:40	02:43	02:57	02:41	02:45	02:54

Source: OZTAM Metro and Subscription TV and Regional TAM Regional FTA+WA databases. Average time spent viewing [ATV 0200-2600 (2am -2am)] across the population in TV homes within metered markets.

IN-HOME LINEAR TV: WHEN?

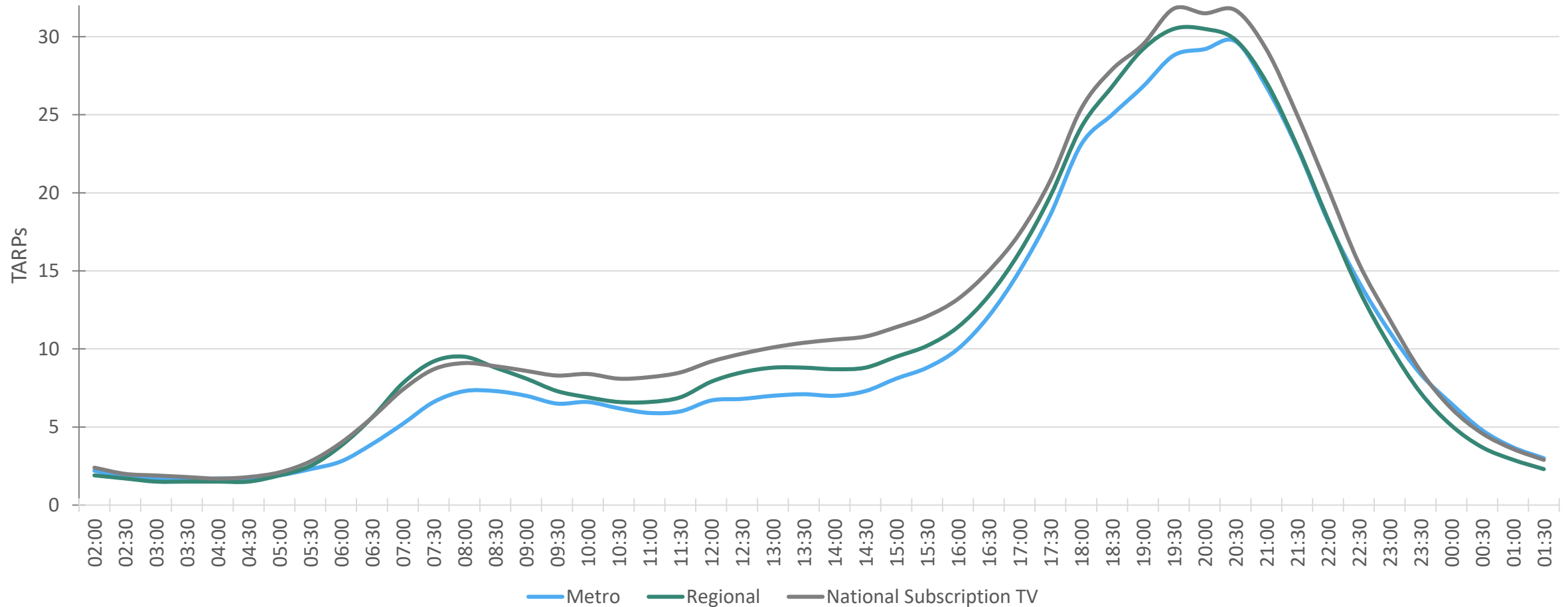
Jul - Dec 2018



WHEN DO WE EXPERIENCE LINEAR TV AT HOME?

METRO, REGIONAL & NATIONAL SUBSCRIPTION

SHAPE OF THE DAY TARP, TOTAL PPL



Source: OzTAM Metro & National STV and Regional TAM Regional FTA+WA Total TV. TARP, 0200-2600. July to December 2018 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

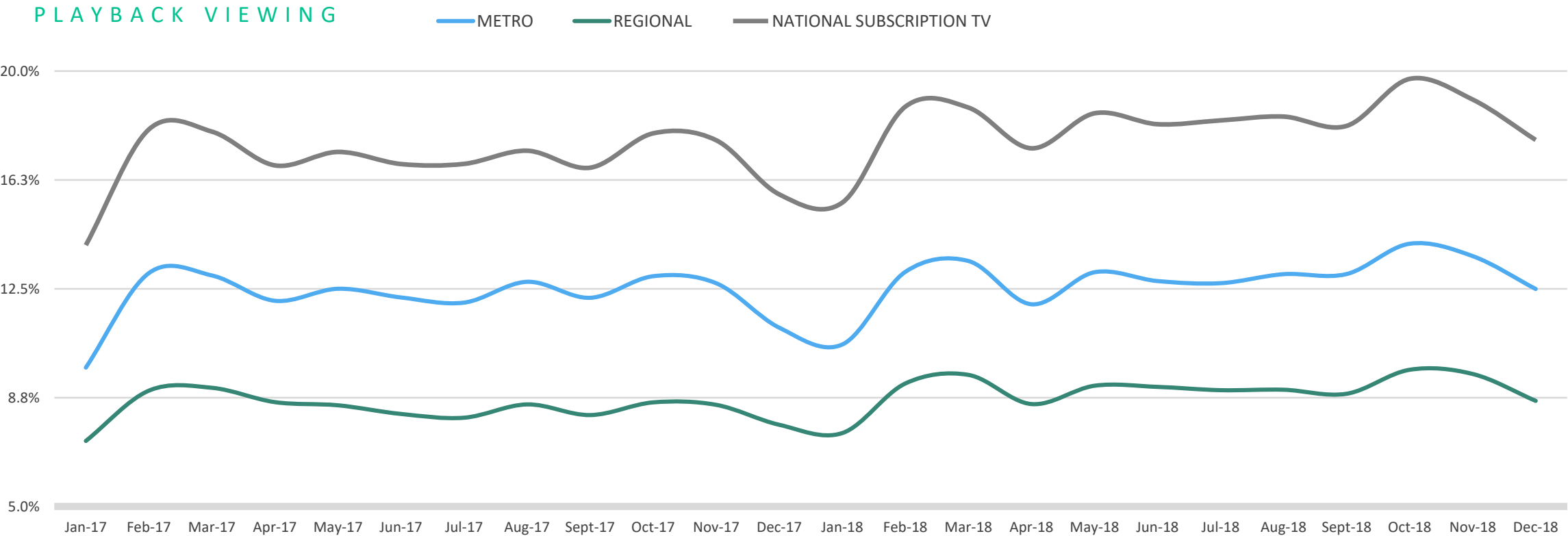
IN HOME LINEAR TV: PLAYBACK

Jul - Dec 2018



PLAYBACK VIEWING TREND

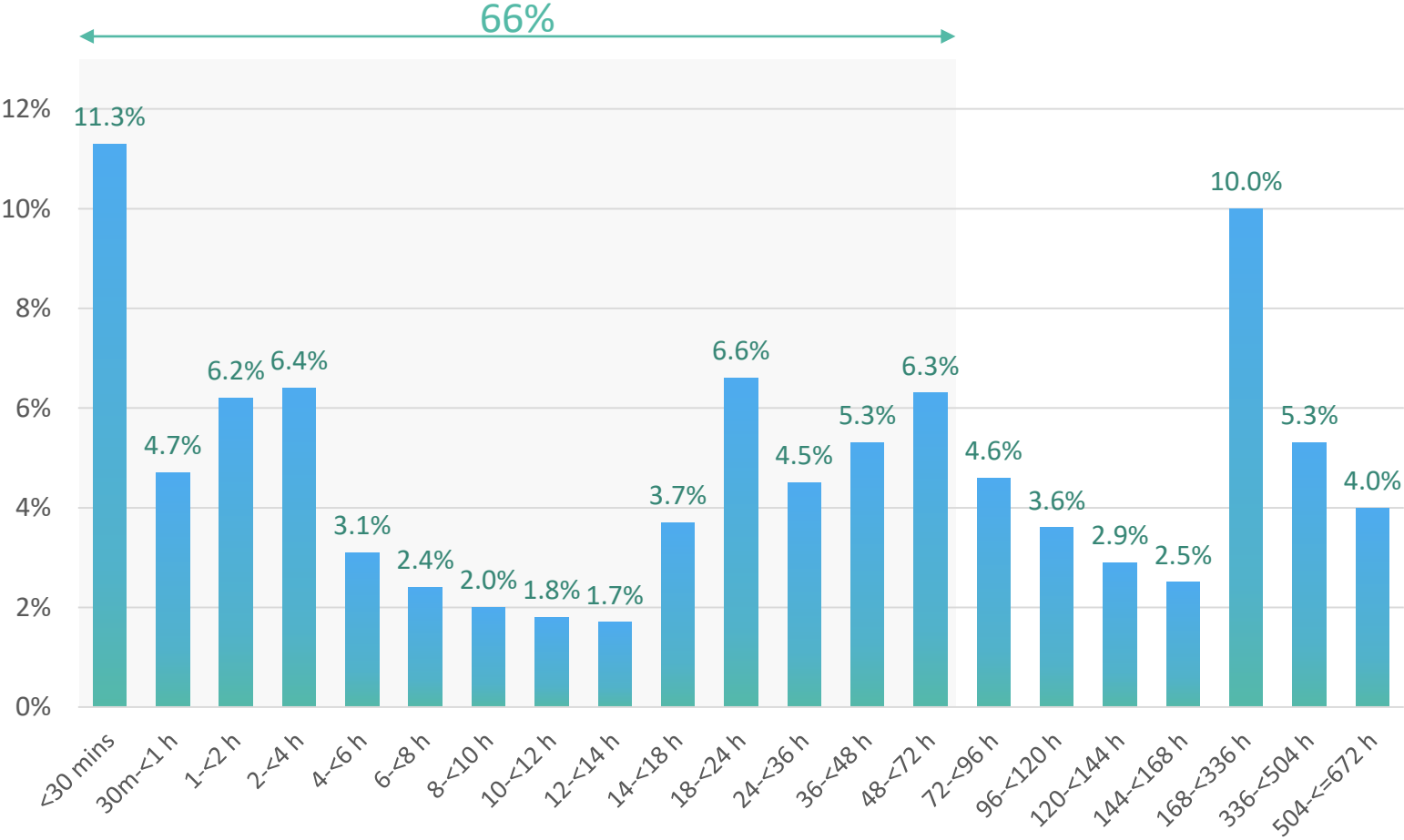
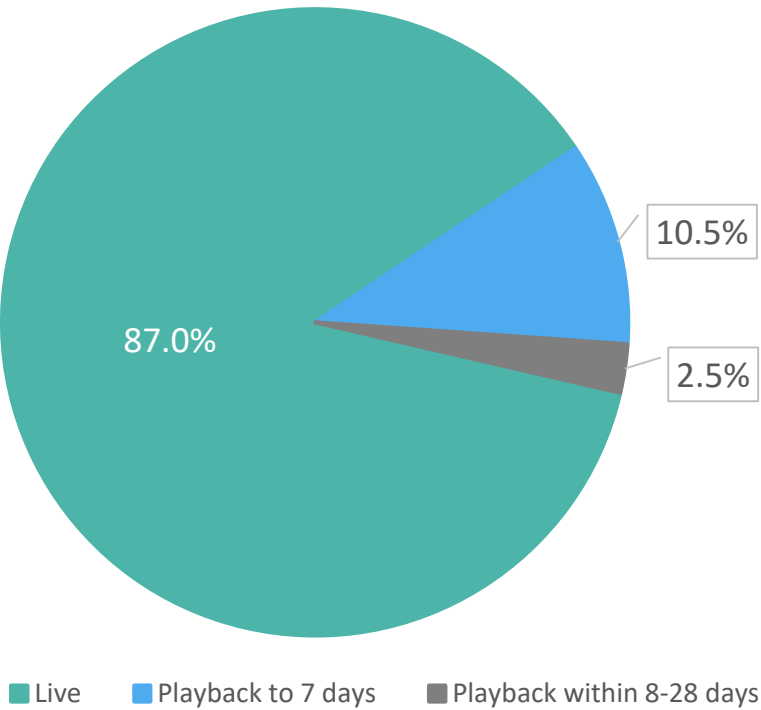
Playback as a proportion of overall viewing has grown since its introduction in 2010, but growth has slowed since the introduction of Broadcast On-Demand Services. The peaks at the start of each year are driven by competing ‘must see’ TV.



Source: OzTAM Metro, and National STV and Regional TAM Regional FTA+WA for % of playback to 28 days , Total TV. (28 day playback only available from 2016)

AROUND TWO IN EVERY THREE PEOPLE PLAYBACK THEIR RECORDED PROGRAM WITHIN 72 HOURS OF BROADCAST

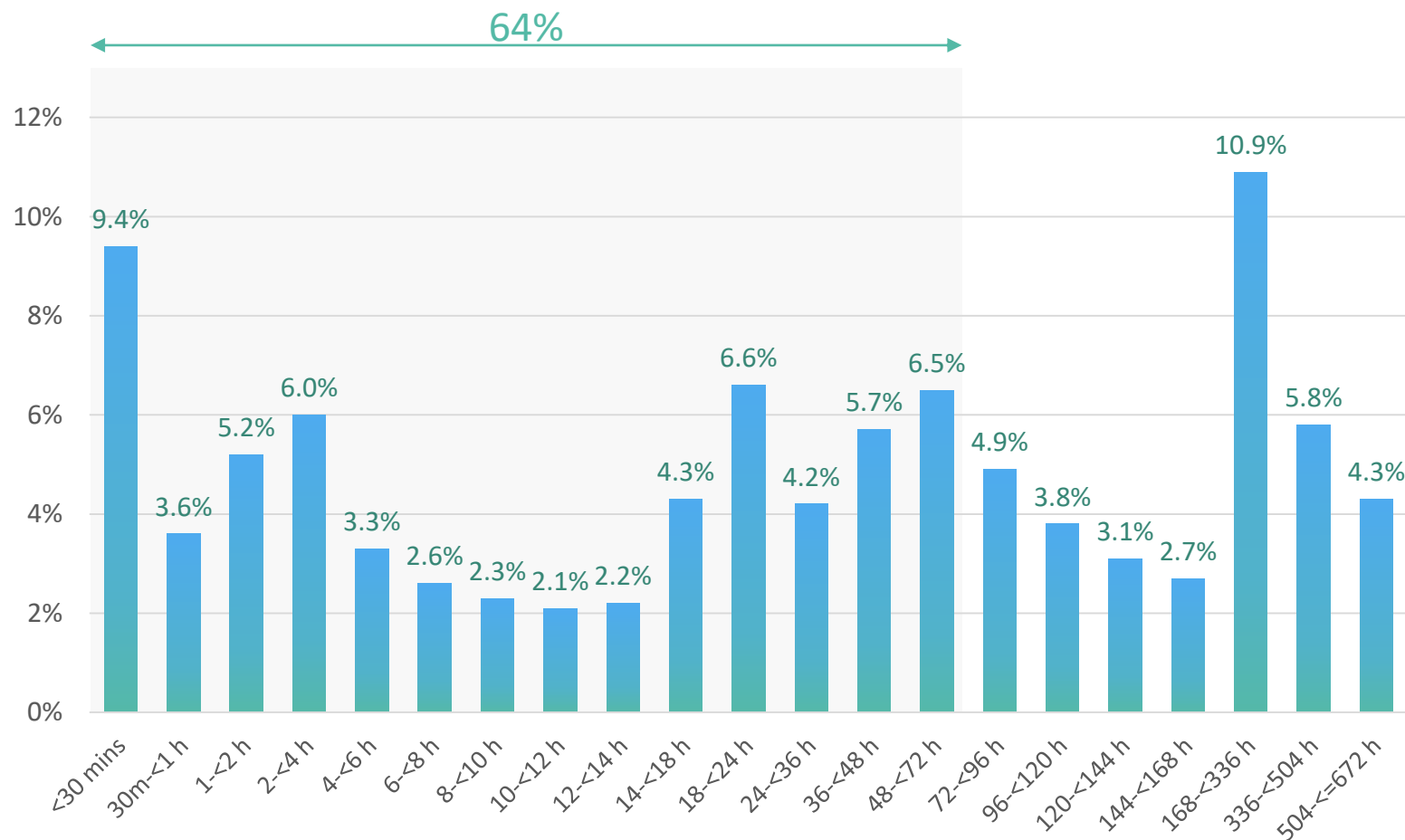
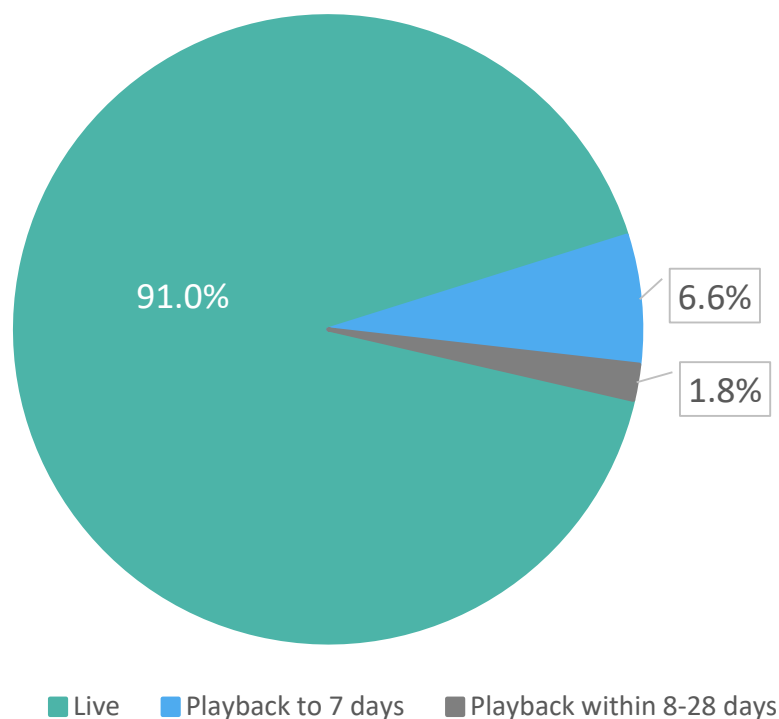
METRO



Source: OzTAM Metro Total TV. 0200-2600. July to December 2018. % of Playback viewing Includes live /as 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

AROUND TWO IN EVERY THREE PEOPLE PLAYBACK THEIR RECORDED PROGRAM WITHIN 72 HOURS OF BROADCAST

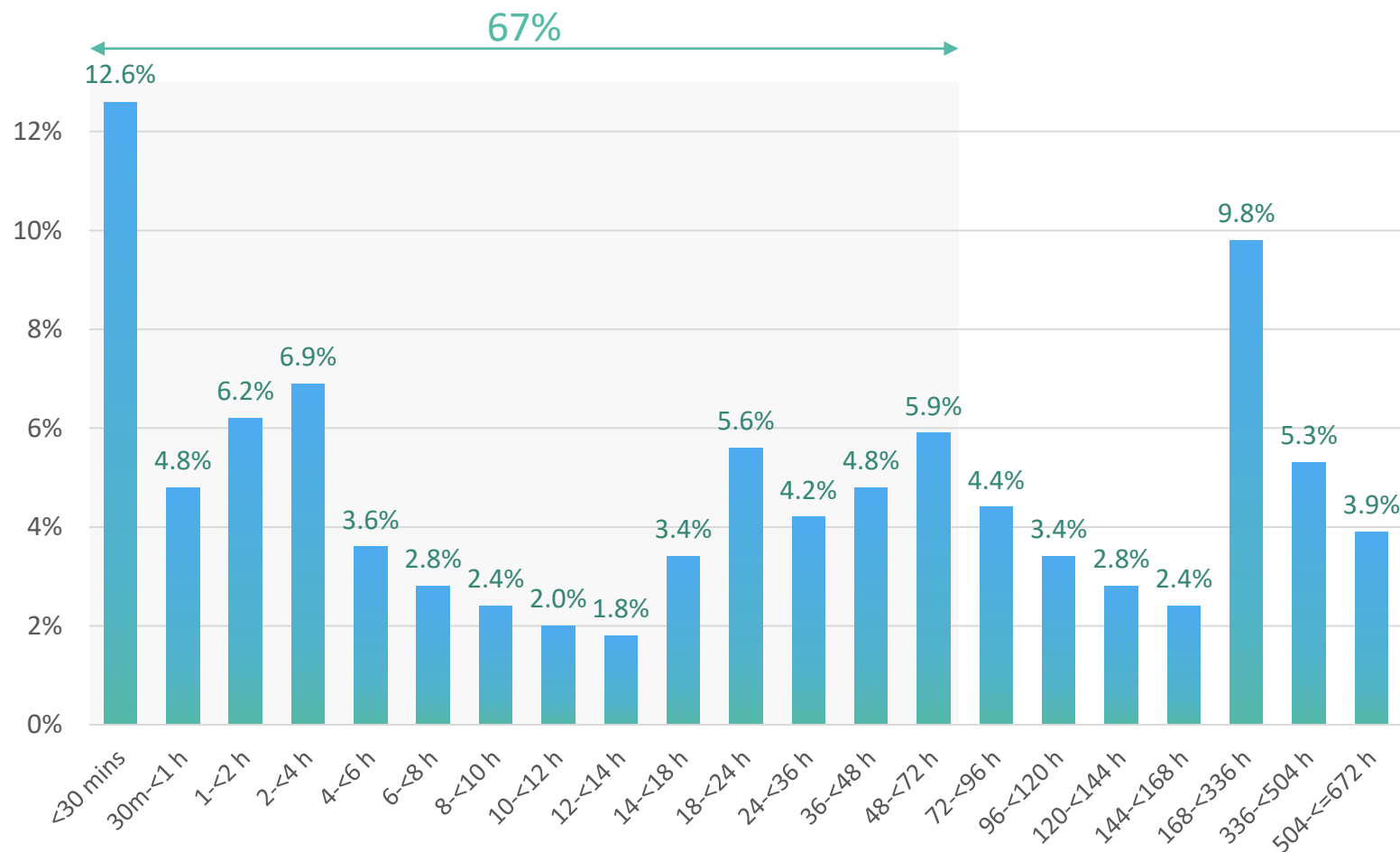
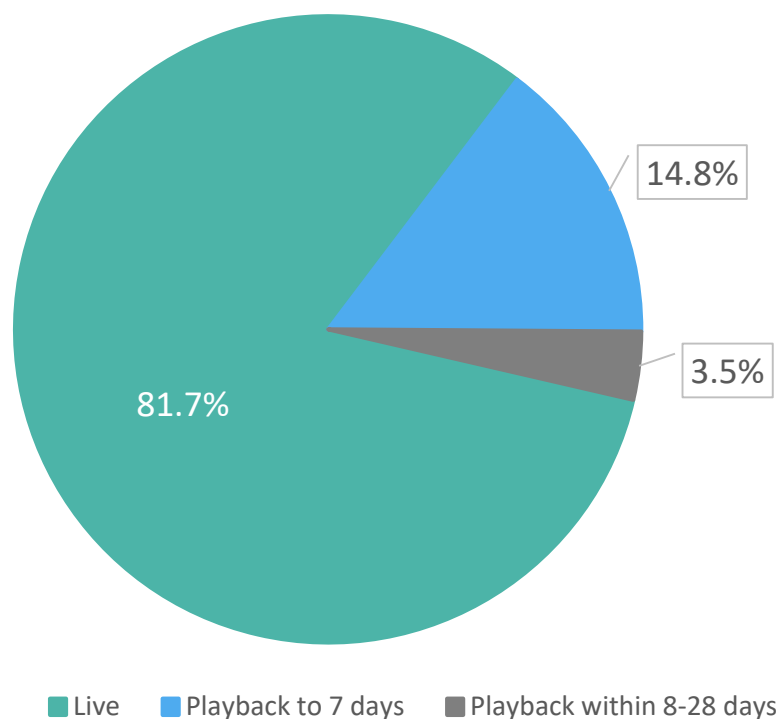
REGIONAL



Source: Regional TAM Regional FTA+WA Total TV. 0200-2600. July to December 2018. % of Playback viewing Includes live /as 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

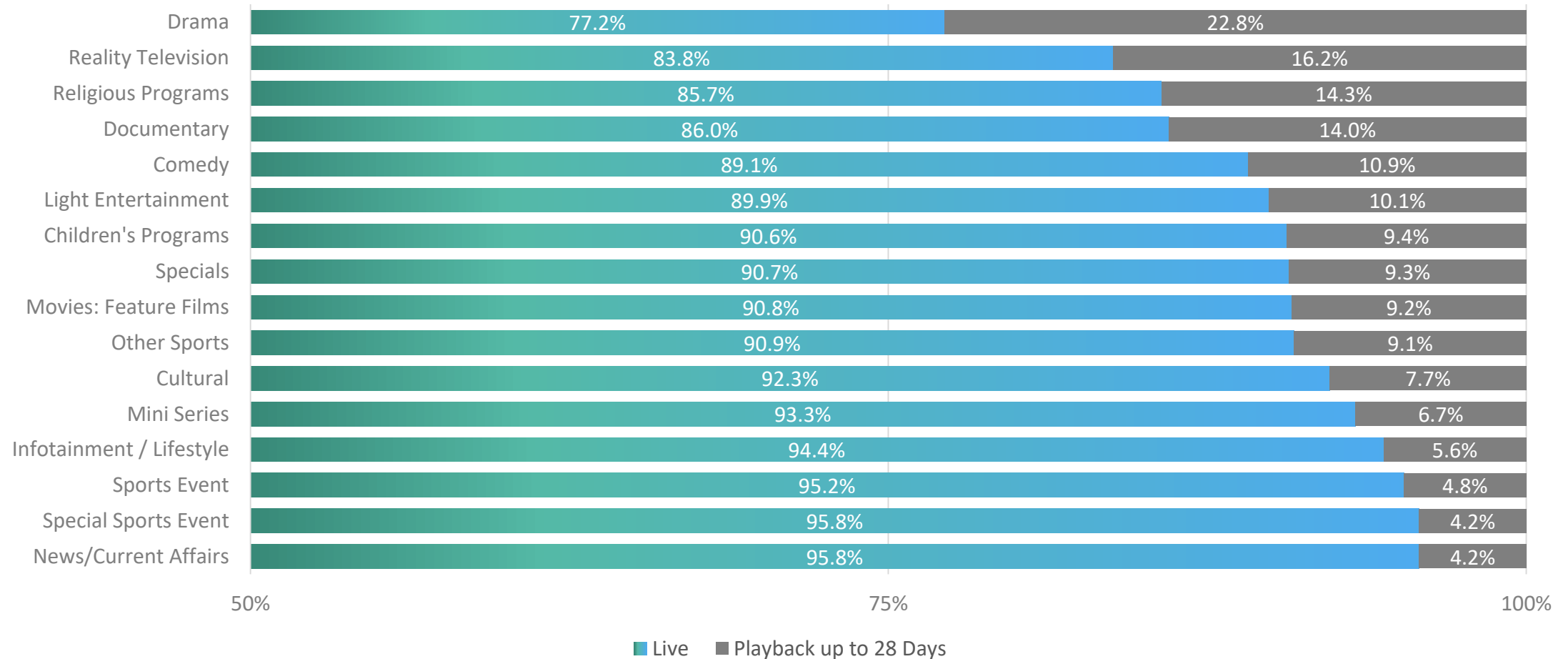
AROUND TWO IN EVERY THREE PEOPLE PLAYBACK THEIR RECORDED PROGRAM WITHIN 72 HOURS OF BROADCAST

NATIONAL SUBSCRIPTION



PLAYBACK CAN INCREASE IN-HOME LINEAR AUDIENCES BY UP TO 22%

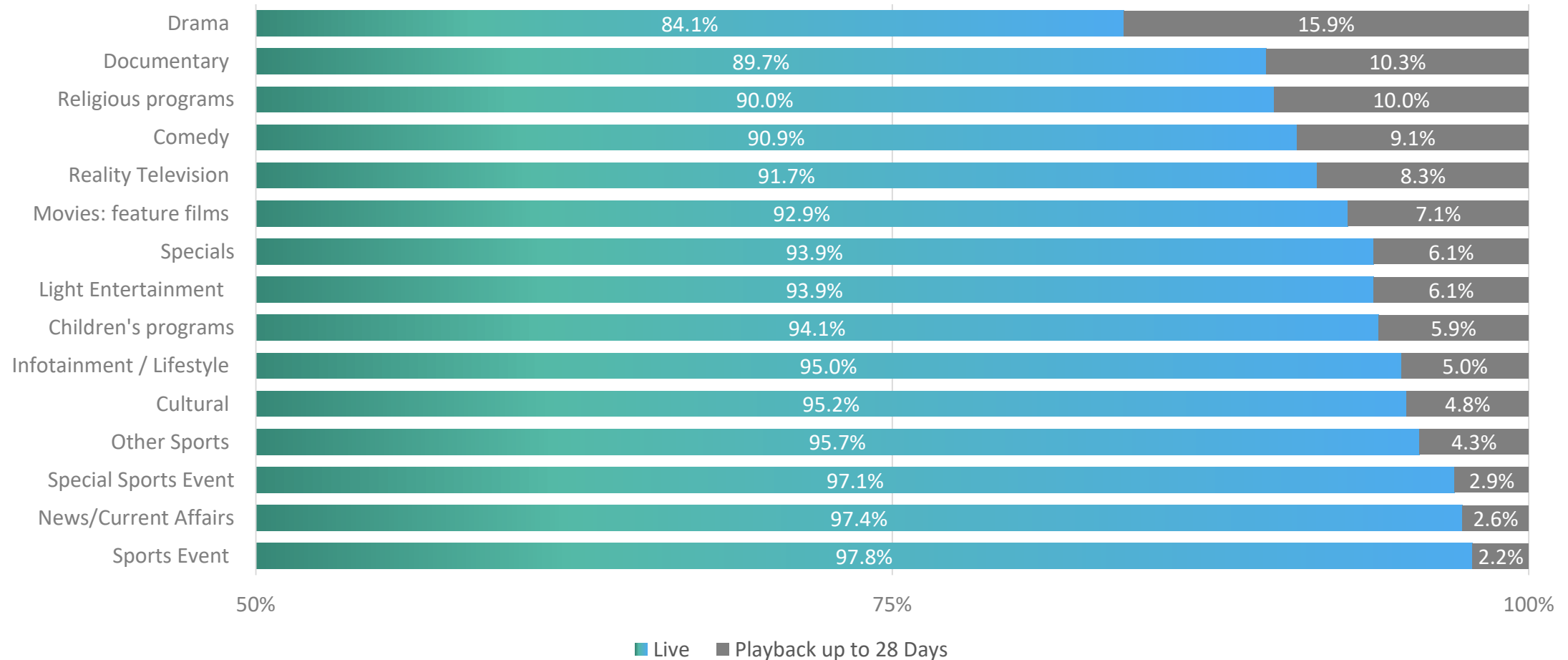
M E T R O



Source: OZTAM Metro, Total TV. 0200-2600. July to December 2018 – FTA Networks only
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

PLAYBACK CAN INCREASE IN-HOME LINEAR AUDIENCES BY UP TO 16%

REGIONAL

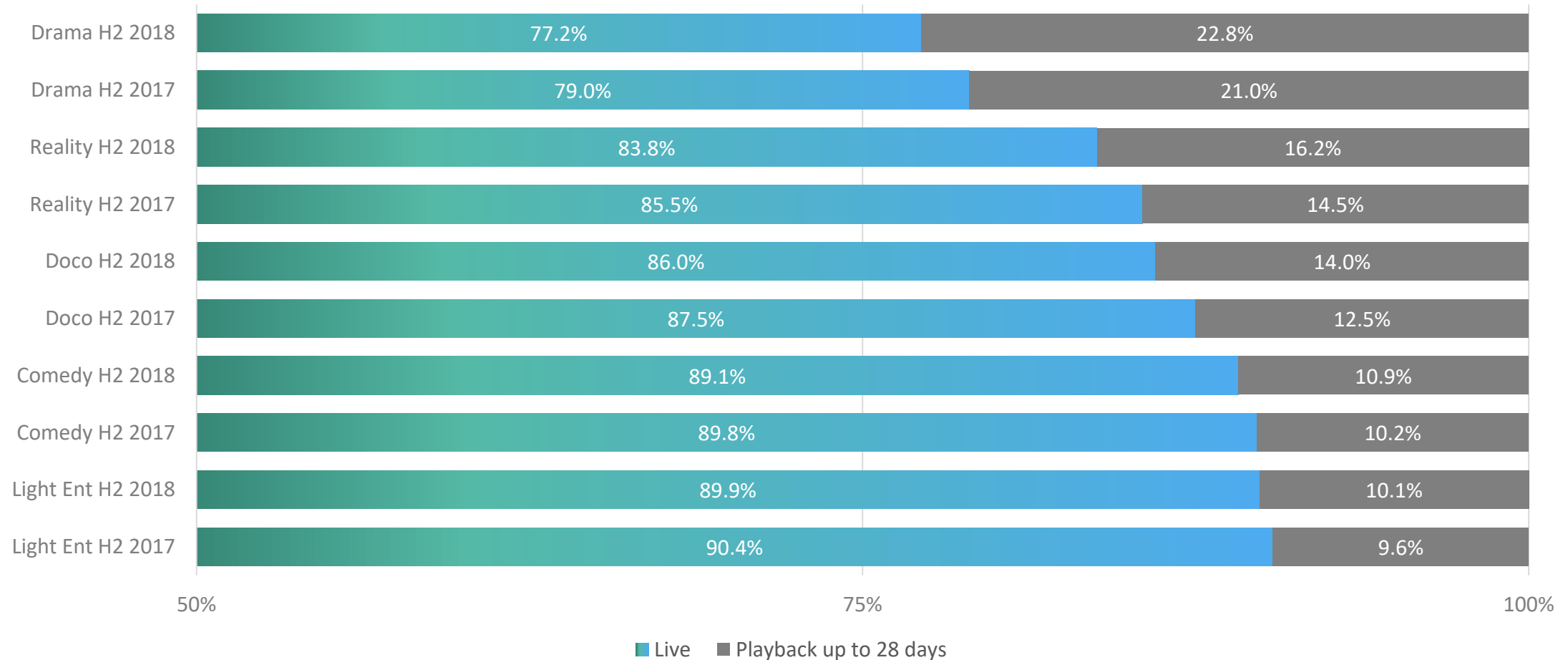


Source: Regional TAM Regional FTA+WA, Total TV. 0200-2600. July to December 2018

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

PLAYBACK AMONGST THE MOST RECORDED GENRES HAS INCREASED PERIOD ON PERIOD

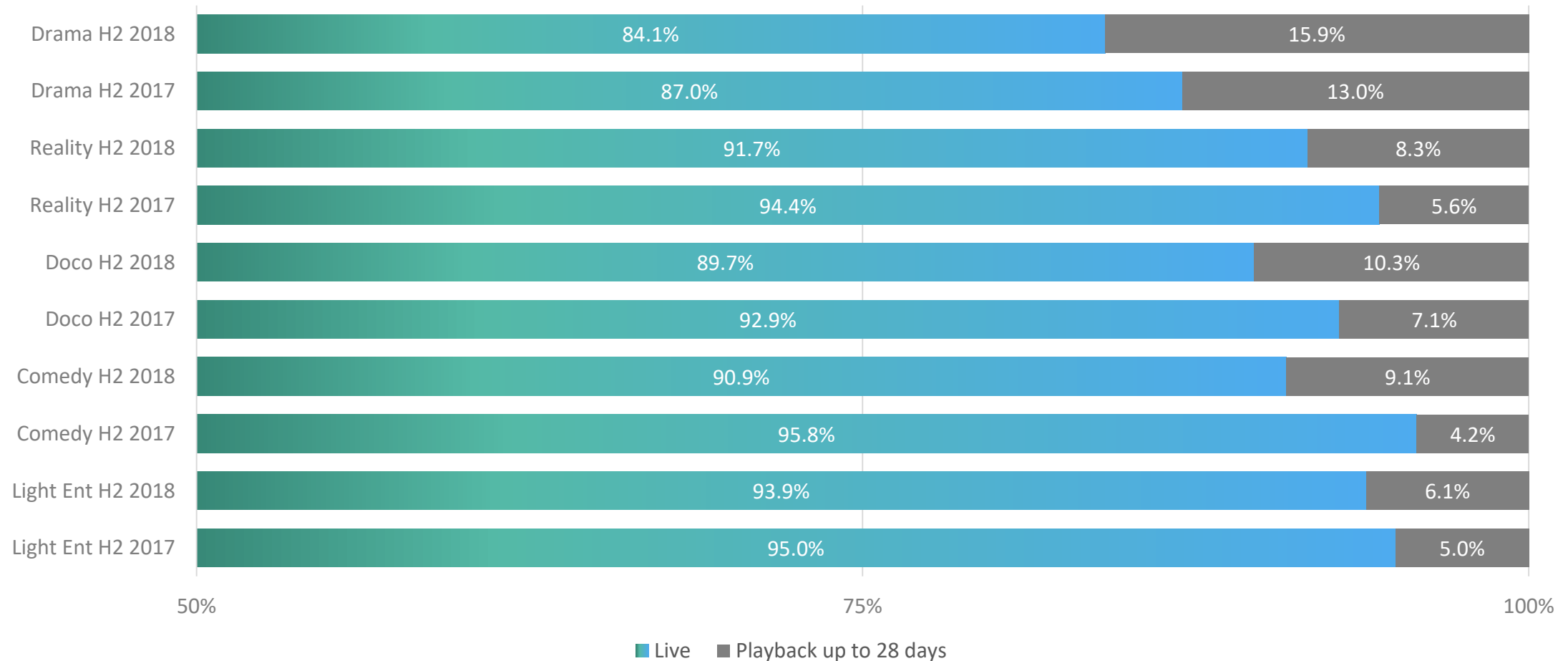
METRO



Source: OZTAM Metro, Total TV. 0200-2600. July to December 2018 – FTA Networks only
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

PLAYBACK AMONGST THE MOST RECORDED GENRES HAS INCREASED PERIOD ON PERIOD

REGIONAL



Source: Regional TAM Regional FTA+WA, Total TV. 0200-2600. July to December 2018

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



For more information contact us
contact@thinktv.com.au