

FACT PACK

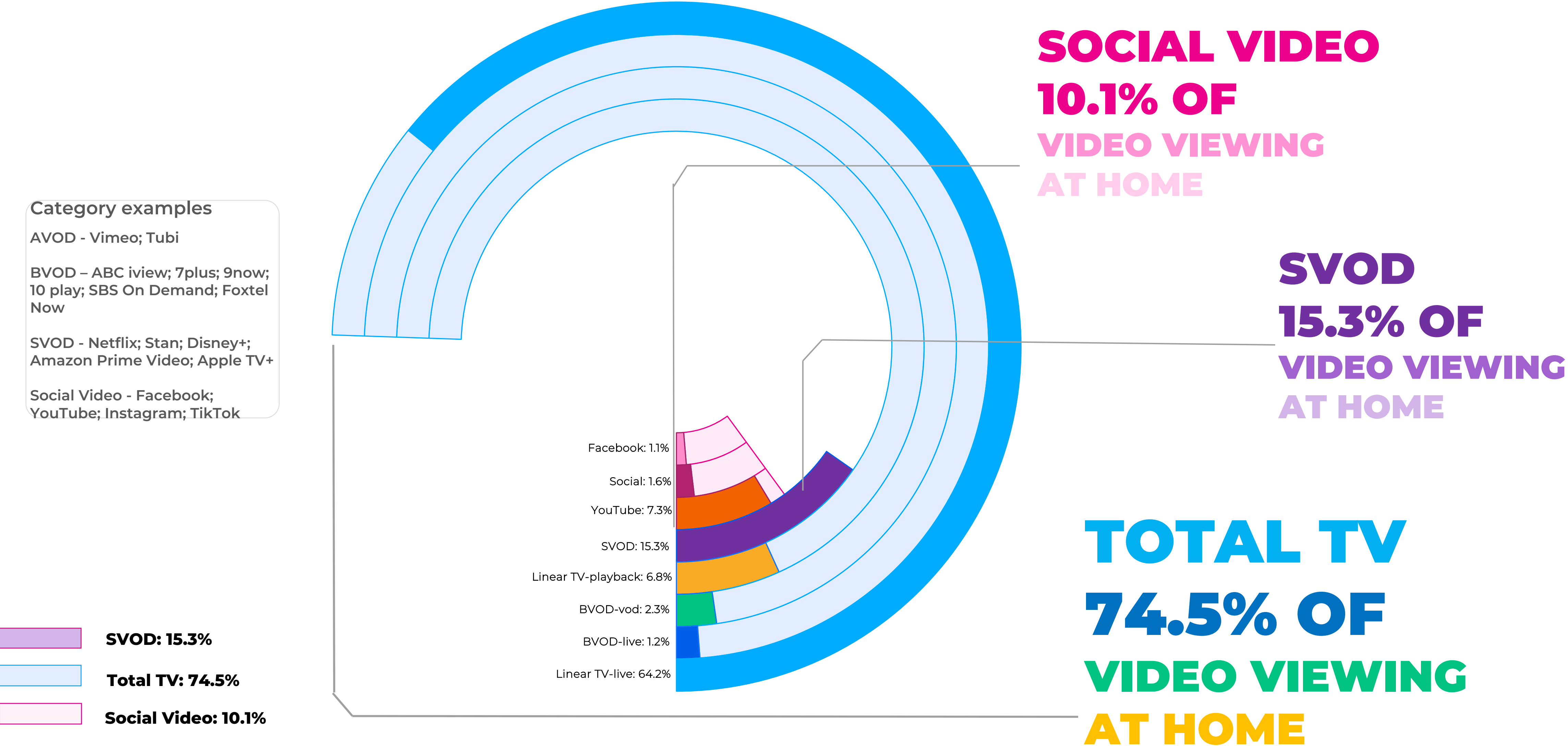
H1, 2021

think 

Penetration & usage

H1, 2021

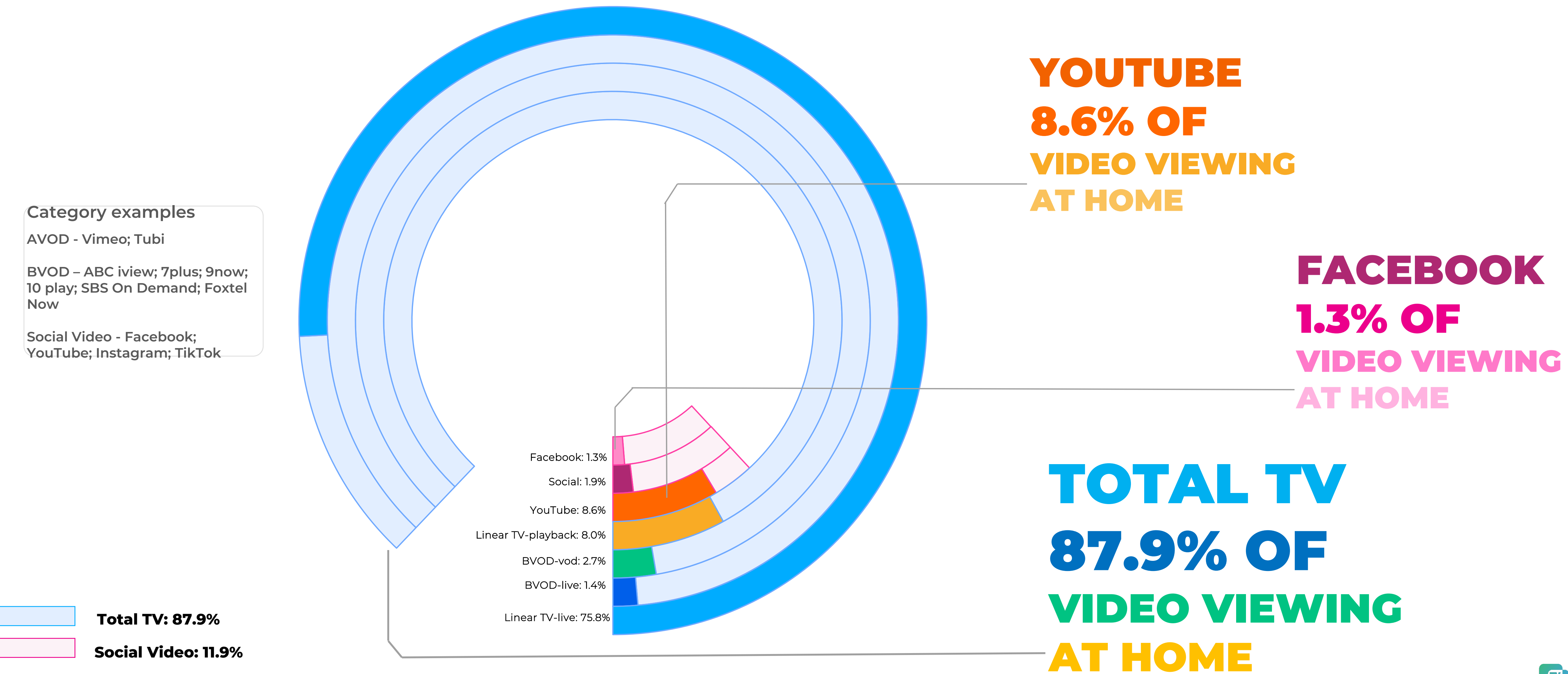
Total video viewing: In-home viewing on any device



Source: Courtesy of OzTAM. Share of video viewing in Australian homes for the month of June, 2021 (May 30 – June 26, 2021).

Note: The data represents OzTAM's best estimate of total video usage in home on any device, blending data collected from the standard TAM panel along with a national streaming meter panel. The data is not weighted to metro or national level, but is a robust representation of the complete in-home video consumption landscape. The TV portion of the viewing includes co-viewers where they are registered in the OzTAM people meter system. Other devices are assumed to have only one viewer for any viewing session. This data represents in-home usage only, and does not include extra viewing to BVOD, SVOD and social services from out-of-home venues. The data does not include any viewing to gaming, pornography or other non-broadcast video usage.

Total ad-supported video viewing: In-home viewing on any device




Source: Courtesy of OzTAM. Share of video viewing in Australian homes for the month of June, 2021 (May 30 – June 26, 2021).

Note: The data represents OzTAM's best estimate of total video usage in home on any device, blending data collected from the standard TAM panel along with a national streaming meter panel. The data is not weighted to metro or national level, but is a robust representation of the complete in-home video consumption landscape. The TV portion of the viewing includes co-viewers where they are registered in the OzTAM people meter system. Other devices are assumed to have only one viewer for any viewing session. This data represents in-home usage only, and does not include extra viewing to BVOD, SVOD and social services from out-of-home venues. The data does not include any viewing to gaming, pornography or other non-broadcast video usage.

Screen tech and penetration

		Jul-Dec '20	Jan-Jun '21
Screens per household	Average # of video capable screens per household	6.7	6.6
Screen type	Set	1.8	1.8
	PC/Laptop	1.8	1.8
	Tablet	1.0	1.0
	Mobile	2.0	2.0
	Total	6.7	6.6
Video tech penetration	High-definition TV sets	99%	99%
	PVR	50%	47%
	Internet connectivity	91%	91%
	Internet capable TV sets	62%	64%
	Connected TV sets	52%	55%
	Smart phones	94%	94%
	Tablets	60%	59%
	PC/Laptops	81%	81%

Source: OzTAM & Regional TAM Establishment Survey; . 1 Jul 2020-31 Dec 2020 & 1 Jan 2021- 30 Jun 2021. 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 Survey (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.

think

Usage

		Jul-Dec '20	Jan-Jun '21
How long?	Average monthly hours consumed per person - Linear TV	64:21	60:34
	Average monthly total hours consumed - BVOD	94,932,5506h	105,811,197h
How many?	Weekly average cumulative reach – Linear TV	72.6%	71.2%
	Monthly average cumulative reach – Linear TV	85.3%	85.1%
	Weekly average cumulative Reach – Linear TV	17.79m	17.53m
	Monthly average cumulative reach – Linear TV	20.89m	20.93m
How viewed?	Linear TV - live	88.4%	87.8%
	Linear TV - playback to 7 days	9.2%	9.6%
	Linear TV - playback 8 to 28 days	2.4%	2.6%
	Linear TV - Total	100%	100%
	BVOD - Live stream	35.3%	35.6%
	BVOD – On demand	64.7%	64.4%
	BVOD – Total	100%	100%

Source: OzTAM VPM. 1 Jul 2020-31 Dec 2020 & 1 Jan 2021- 30 Jun 2021. ; 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; 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 within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600 = 2am-2am

Time spent

		Jul-Dec '20	Jan-Jun '21
Linear TV viewing type	Average monthly hours consumed per person - Linear TV: Live	56:51	53.12
	Average monthly hours consumed per person – Linear TV: Playback to 7 days	5:54	5:47
	Average monthly hours consumed per person – Linear TV: Playback 8 to 28 days	1:34	1:34
BVOD viewing type	Average monthly hours consumed - BVOD: Live Stream	33,914,662h	34,109,084h
	Average monthly hours consumed - BVOD: On Demand	61,017,888h	61,702,060 h
BVOD viewing device	Average monthly total hours consumed - BVOD: Connected TV	63,376,705h	65,162,400h
	Average monthly total hours consumed - BVOD: PC/Laptop	12,132,744h	11,245,592h
	Average monthly total hours consumed - BVOD: Tablet	10,762,142h	10,186,141h
	Average monthly total hours consumed - BVOD: Mobile	8,660,921h	9,205,913h

Source: OzTAM VPM. 1 Jul 2020-31 Dec 2020 & 1 Jan 2021- 30 Jun 2021. ; 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 detail - Linear TV

Average per month	Total people***	Kids*	Teens**	18-24	25-34	35-49	50-64	65+
Viewing live	53:12	21:21	11:08	11:33	20:46	45:08	86:41	127:41
Playback to 7 days	5:47	2:55	1:04	1:24	2:22	5:11	9:05	13:10
Playback 8 to 28 days	1:34	1:55	0:26	0:30	0:50	1:30	2:04	2:30
Total broadcast	60:34	26:12	12:38	13:28	23:58	51:50	97:51	143:21

Source: 1 Jan 2021- 30 Jun 2021, 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

* Kids - People Aged 0-12
** Teens - People Aged 13-17
*** All People - People 0+

Reach detail - Linear TV

Average per week/month	Total people***	Kids*	Teens**	18-24	25-34	35-49	50-64	65+
Weekly reach %	71.2	67.1	47.3	44.0	48.8	55.2	86.6	92.2
Weekly reach 000s	17.53m	2.65m	0.71m	1m	2.03m	3.72m	3.75m	3.68m
Monthly reach %	85.1	85.5	72.9	67.9	73.4	88.5	93.8	96.7
Monthly 000s	20.93m	3.38m	1.09m	1.53m	2.71m	4.33m	4.06m	3.85m

Source: 1 Jan 2021- 30 Jun 2021 OzTAM and Regional TAM databases with Overlap homes de-duplicated. Jul- Dec 2020. 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 within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600 = 2am-2am; 1800-2400 = 6pm-midnight.

* Kids - People Aged 0-12
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*** All People - People 0+

thinkTV

BVOD & usage

H1, 2021

wiview



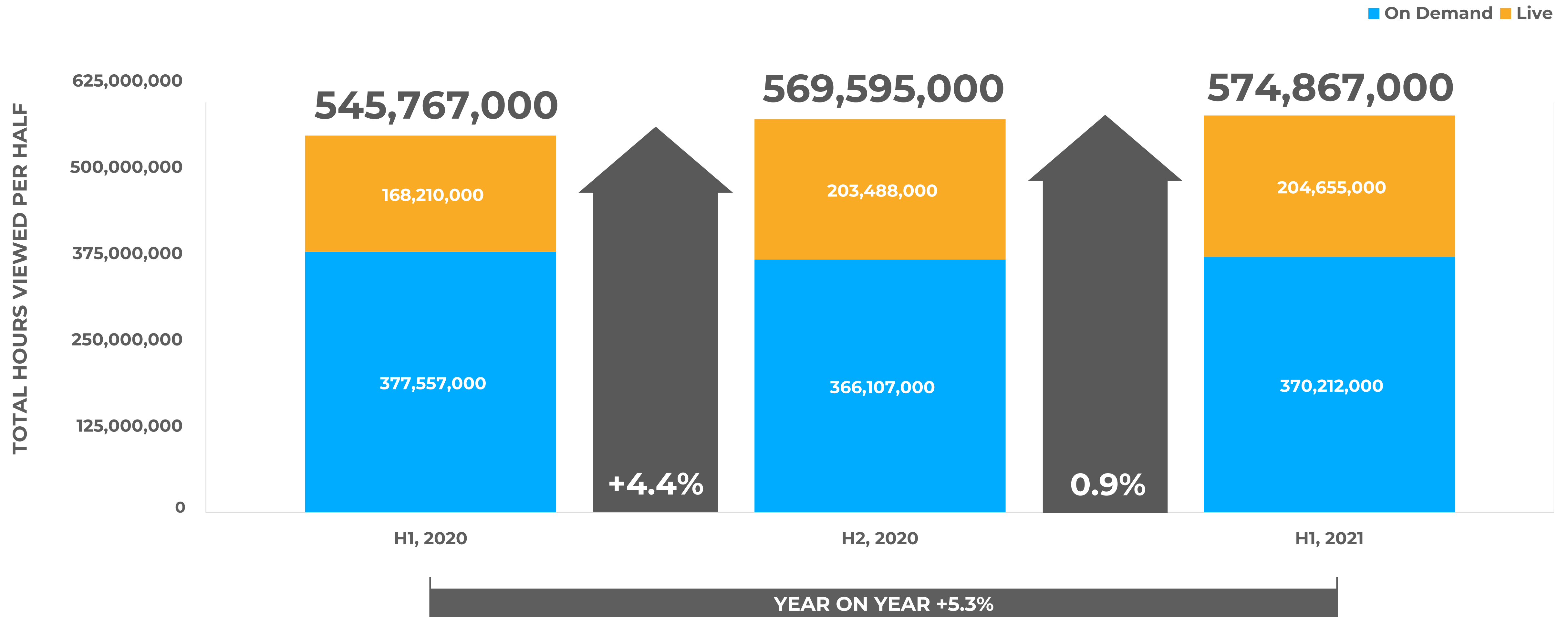
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SBS ON
DEMAND

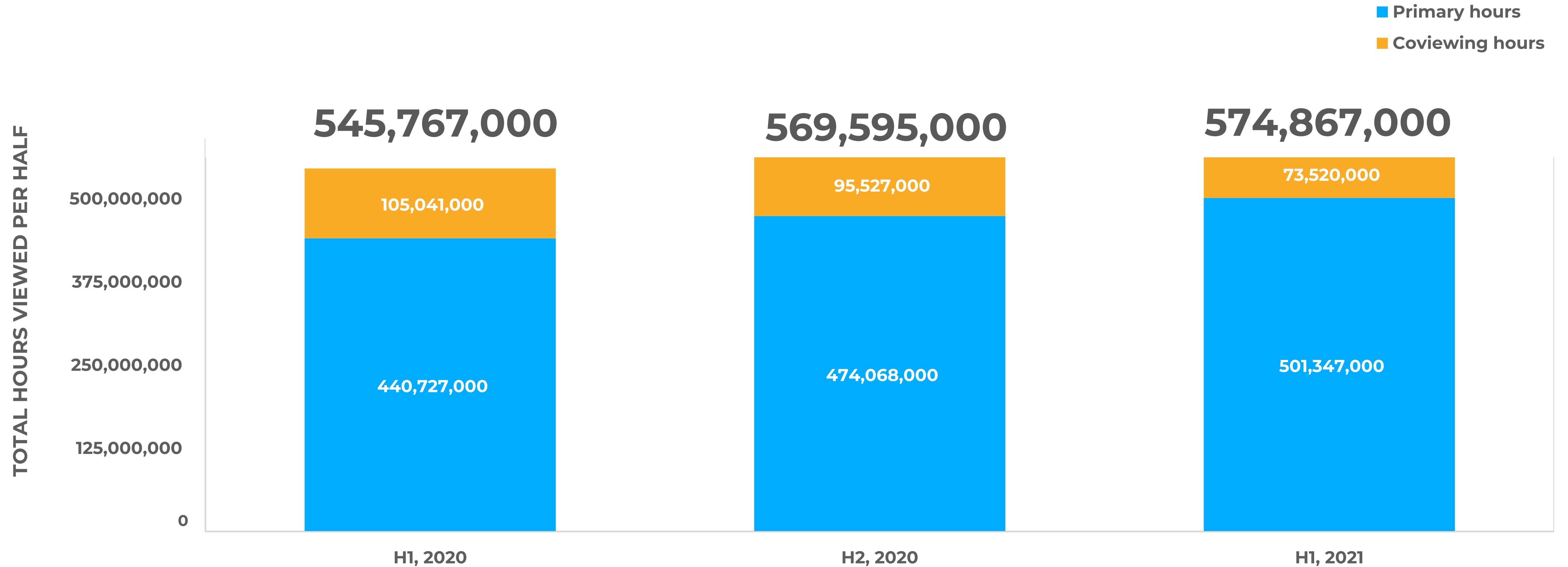


BVOD consumption



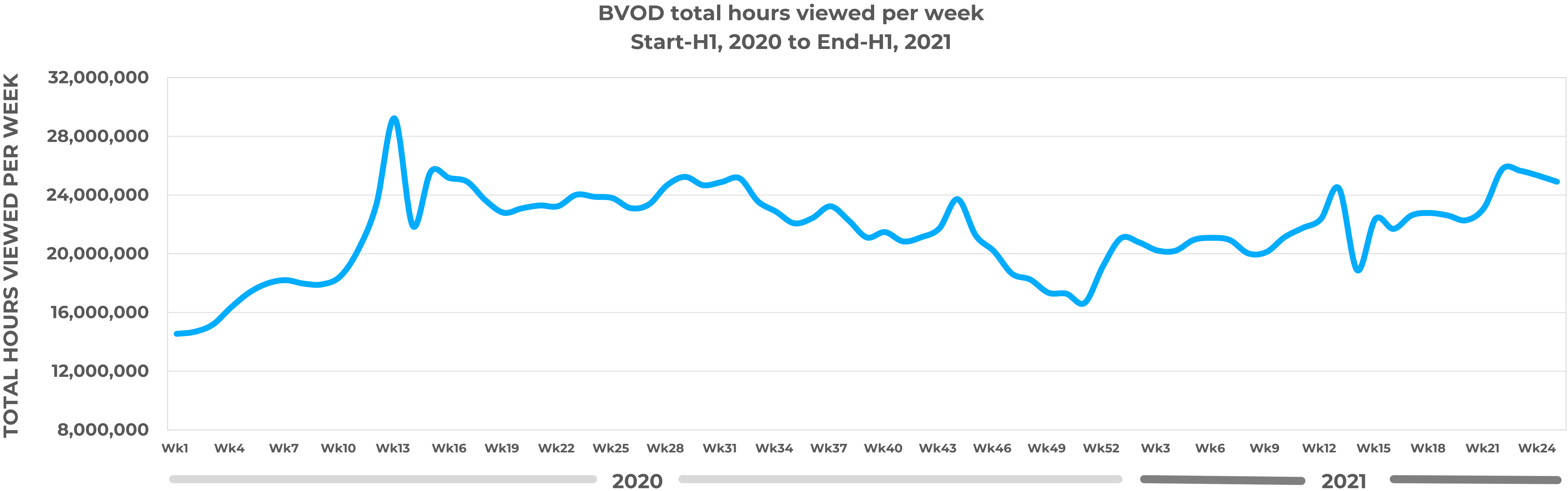
Source: OzTAM VPM. H1 2020 to H1 2021. Numbers rounded to nearest 1000. Includes co-viewing on CTV devices. (Co-viewing now captures up to 3 people watching BVOD on a connected TV set alongside the primary viewer. Previously, co-viewing data was for up to 2 co-viewers.)

BVOD consumption co-viewing



Source: OzTAM VPM. H1 2020 to H1 2021. Numbers rounded to nearest 1000. Includes co-viewing on CTV devices. . (Co-viewing now captures up to 3 people watching BVOD on a connected TV set alongside the primary viewer. Previously, co-viewing data was for up to 2 co-viewers.)

BVOD consumption trend

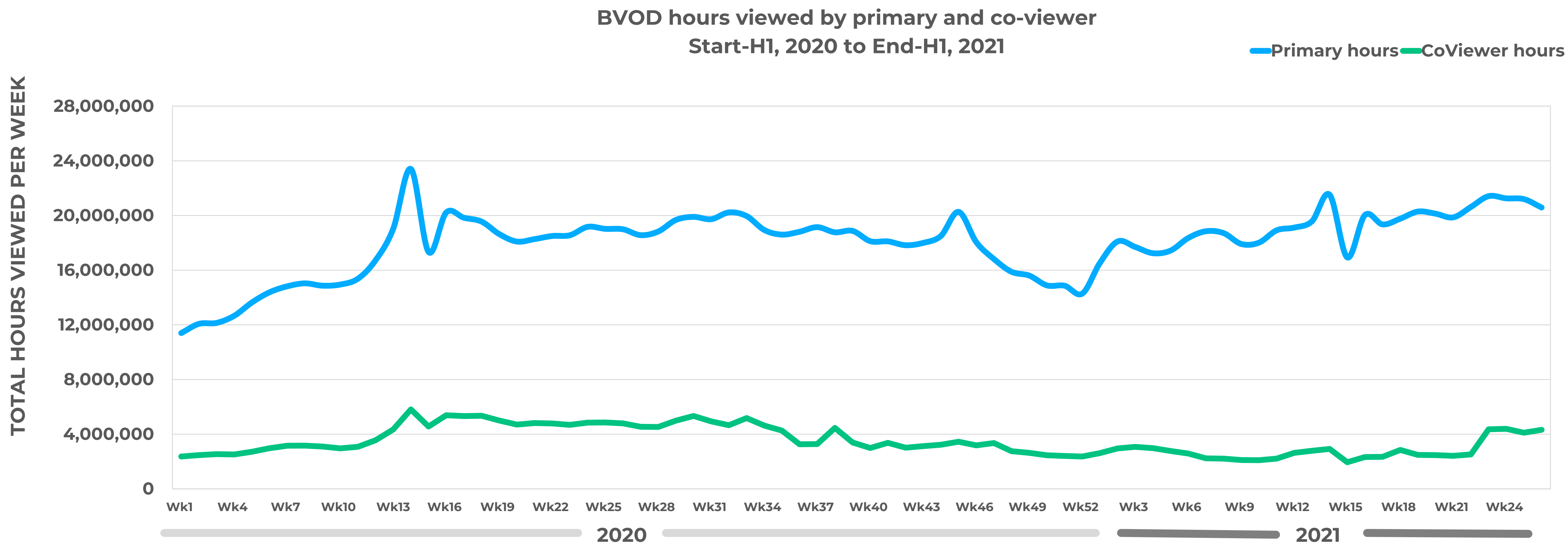


HALF 1, 2021 WEEKLY HOURS VIEWED

WEEK NO.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26
HOURS PW (MILLIONS)	19.1	21.1	20.8	20.2	20.2	20.9	21.1	20.9	20.0	20.1	21.1	21.8	22.4	24.4	18.9	22.4	21.7	22.6	22.8	22.6	22.3	23.2	25.8	25.6	25.3	24.9

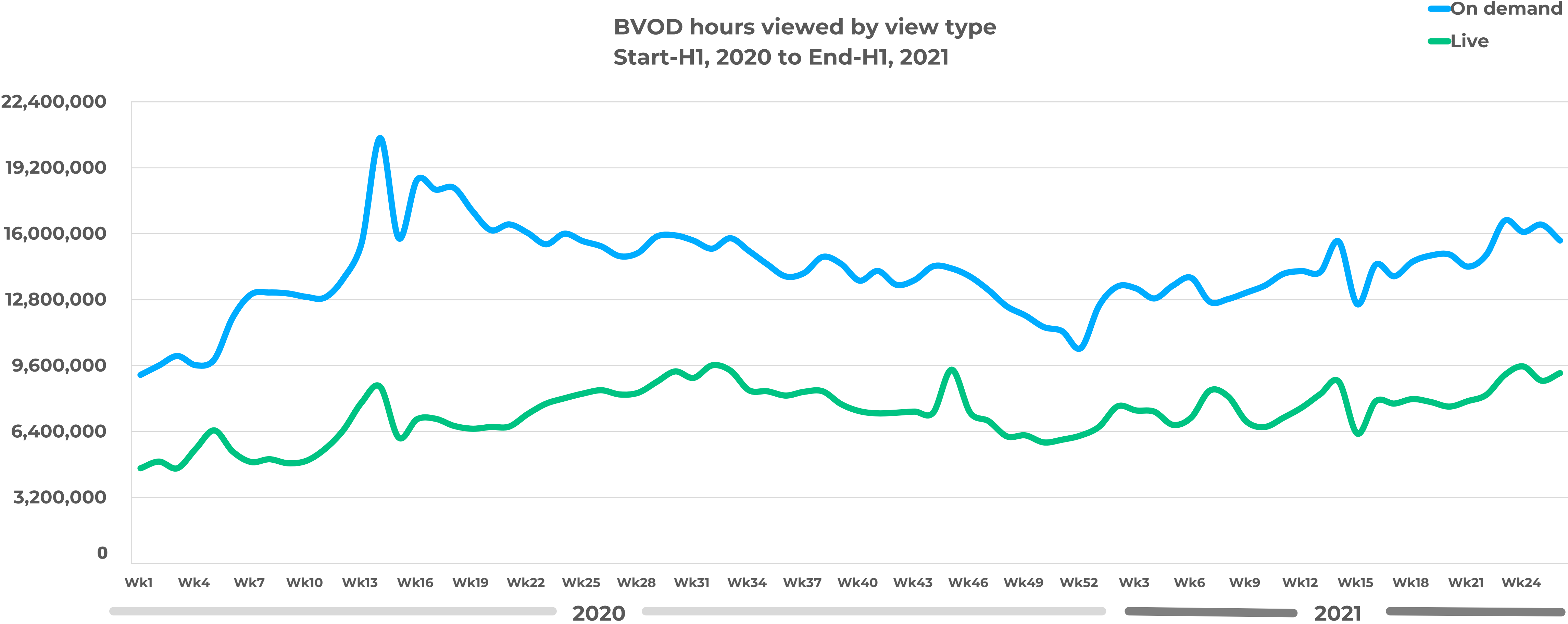
Source: OzTAM VPM. H1 2020 to H1 2021. Rounded to millions . Includes co-viewing on CTV devices

BVOD consumption co-viewing trend



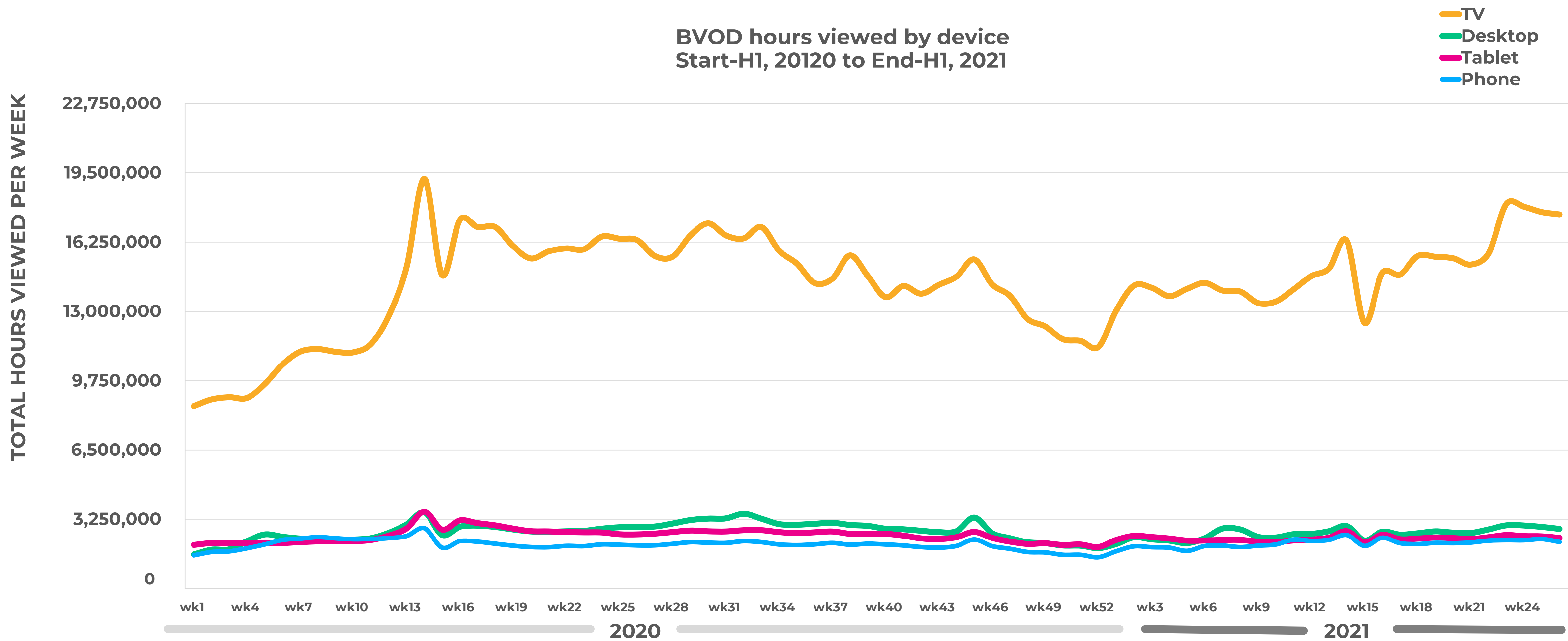
Source: OzTAM VPM. H1 2020 to H1 2021. Includes co-viewing on CTV devices. . (Co-viewing now captures up to 3 people watching BVOD on a connected TV set alongside the primary viewer. Previously, co-viewing data was for up to 2 co-viewers.)

BVOD consumption by view type



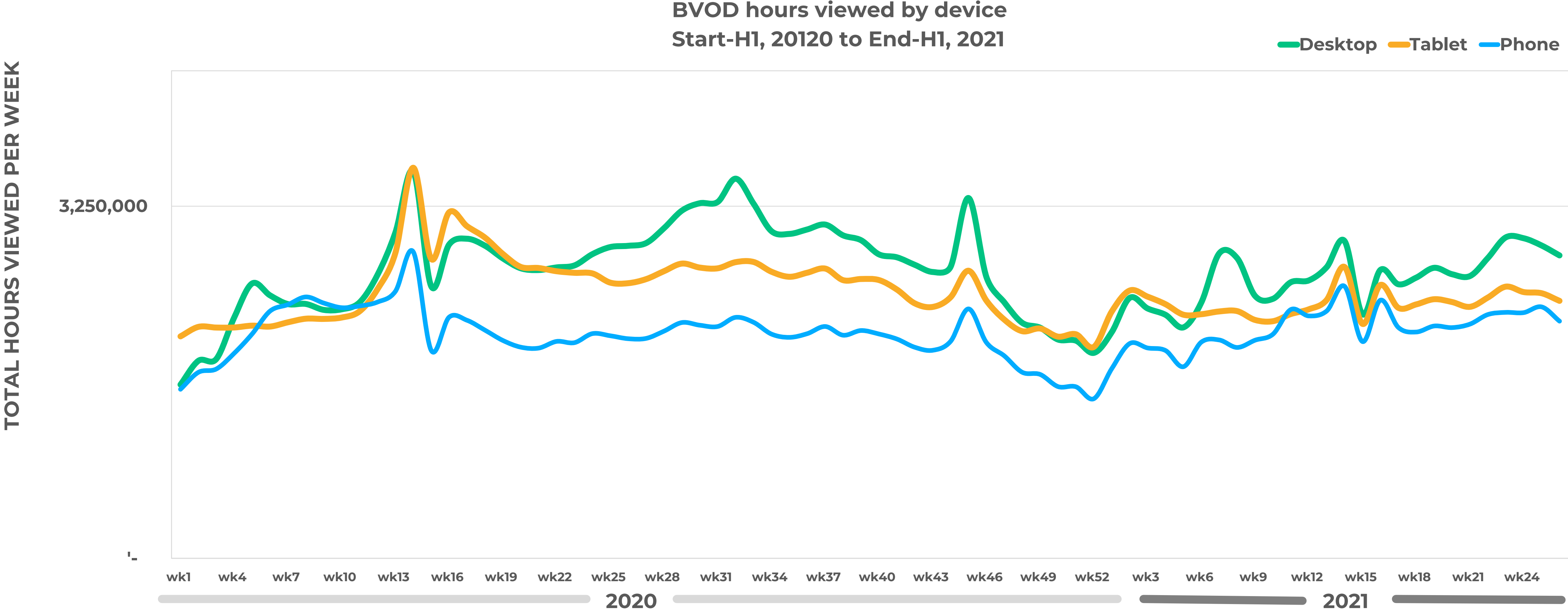
Source: OzTAM VPM. H1 2020 to H1 2021. Includes co-viewing on CTV devices

BVOD consumption by device type



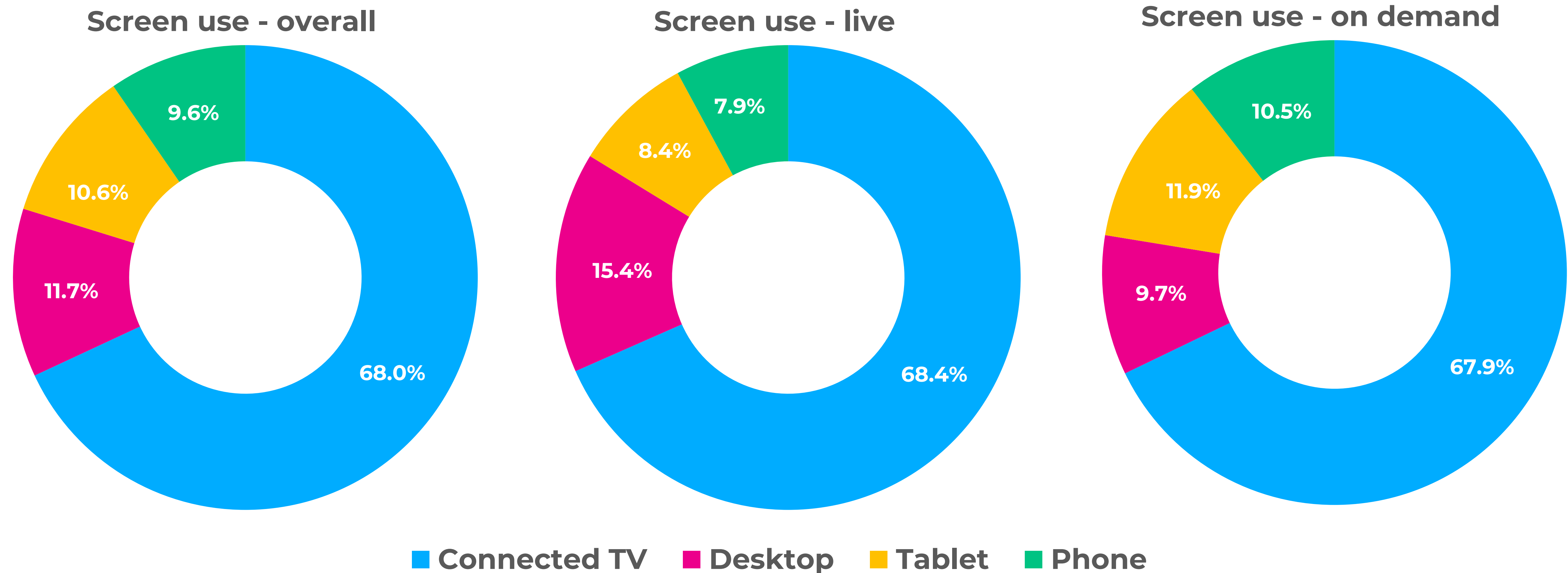
Source: OzTAM VPM. H1 2020 to H1 2021. Includes co-viewing on CTV devices

BVOD consumption by device type (excl. tv)



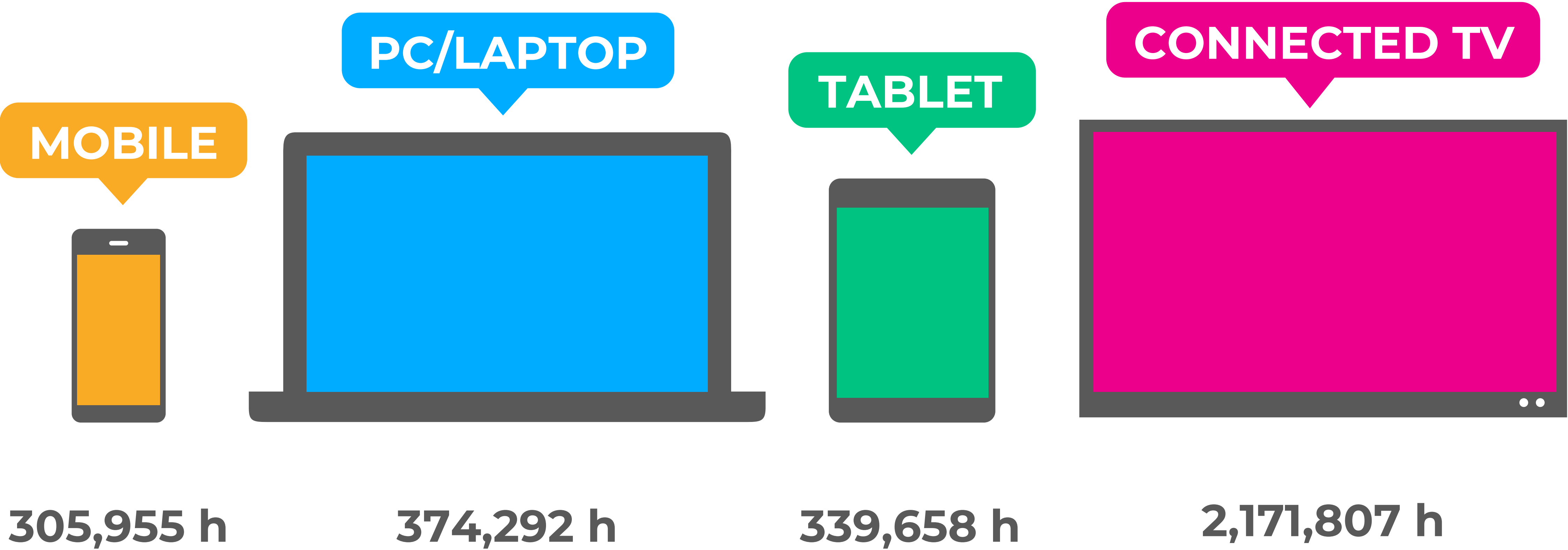
Source: OzTAM VPM. H1 2020 to H1 2021. Includes co-viewing on CTV devices

BVOD average total daily hours per device



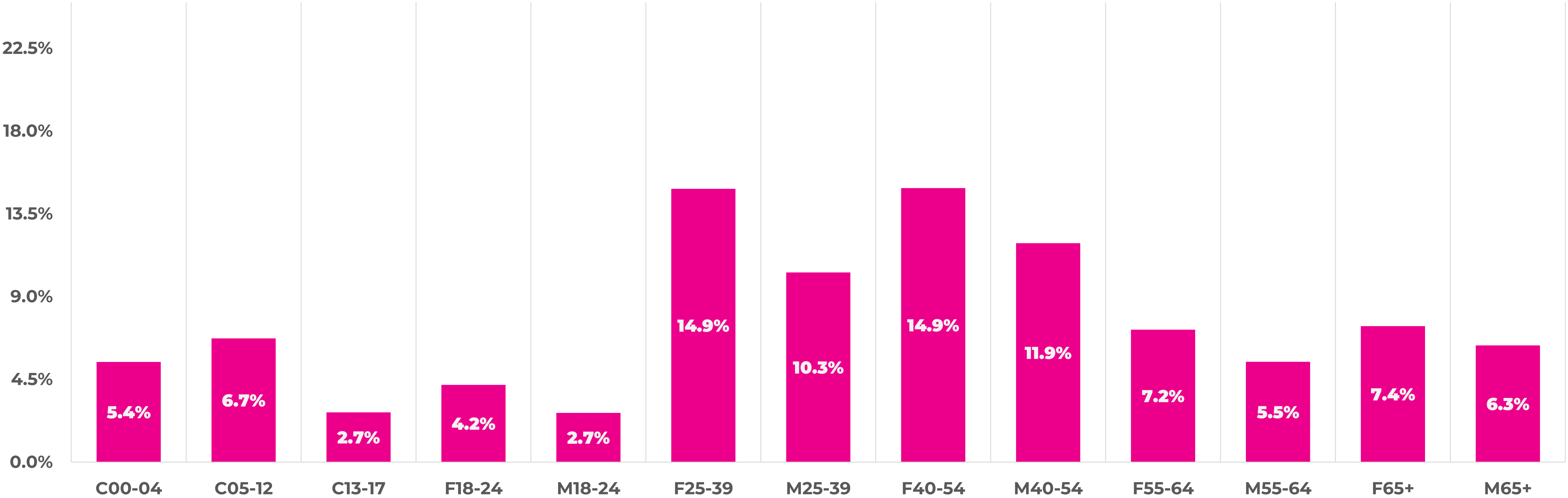
Source: OzTAM VPM. 27 Dec 2020 00h00 – 3 Jul 2021 23h30. Includes co-viewing on CTV devices

BVOD average total daily hours per device



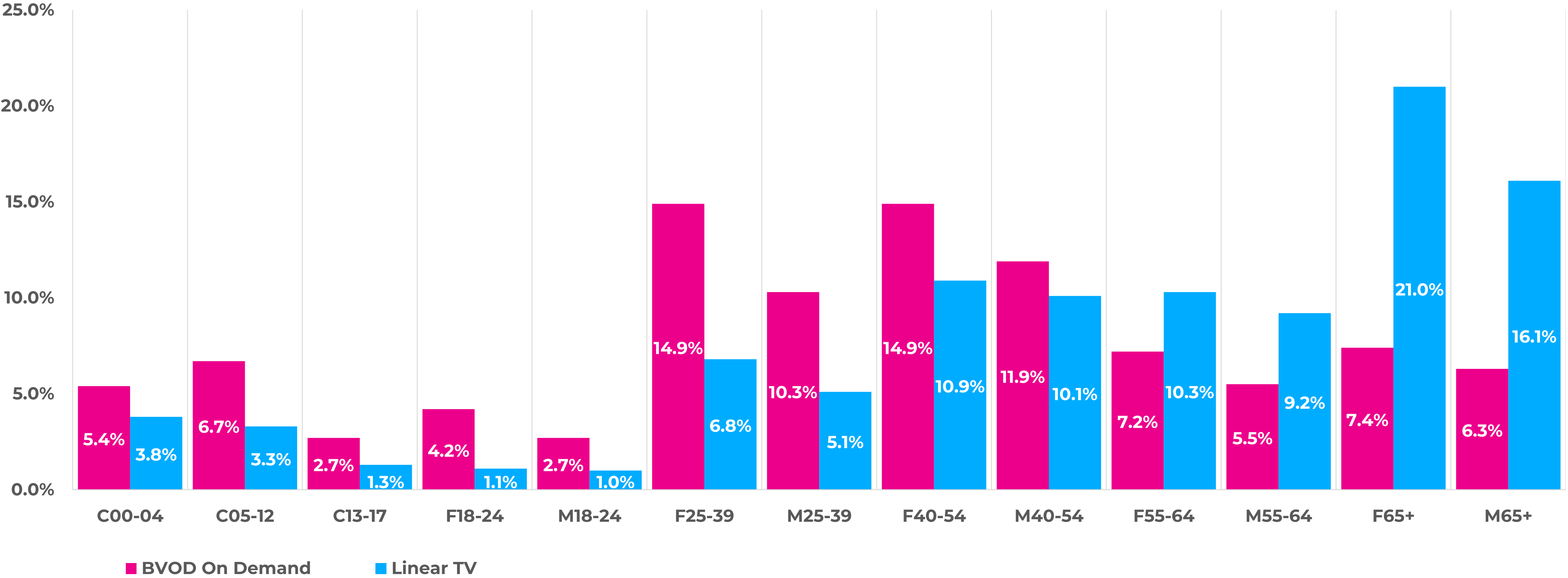
Source: OzTAM VPM. 27 Dec 2020 00h00 – 3 Jul 2021 23h30. Includes co-viewing on CTV devices

Demographic profiles: BVOD viewing



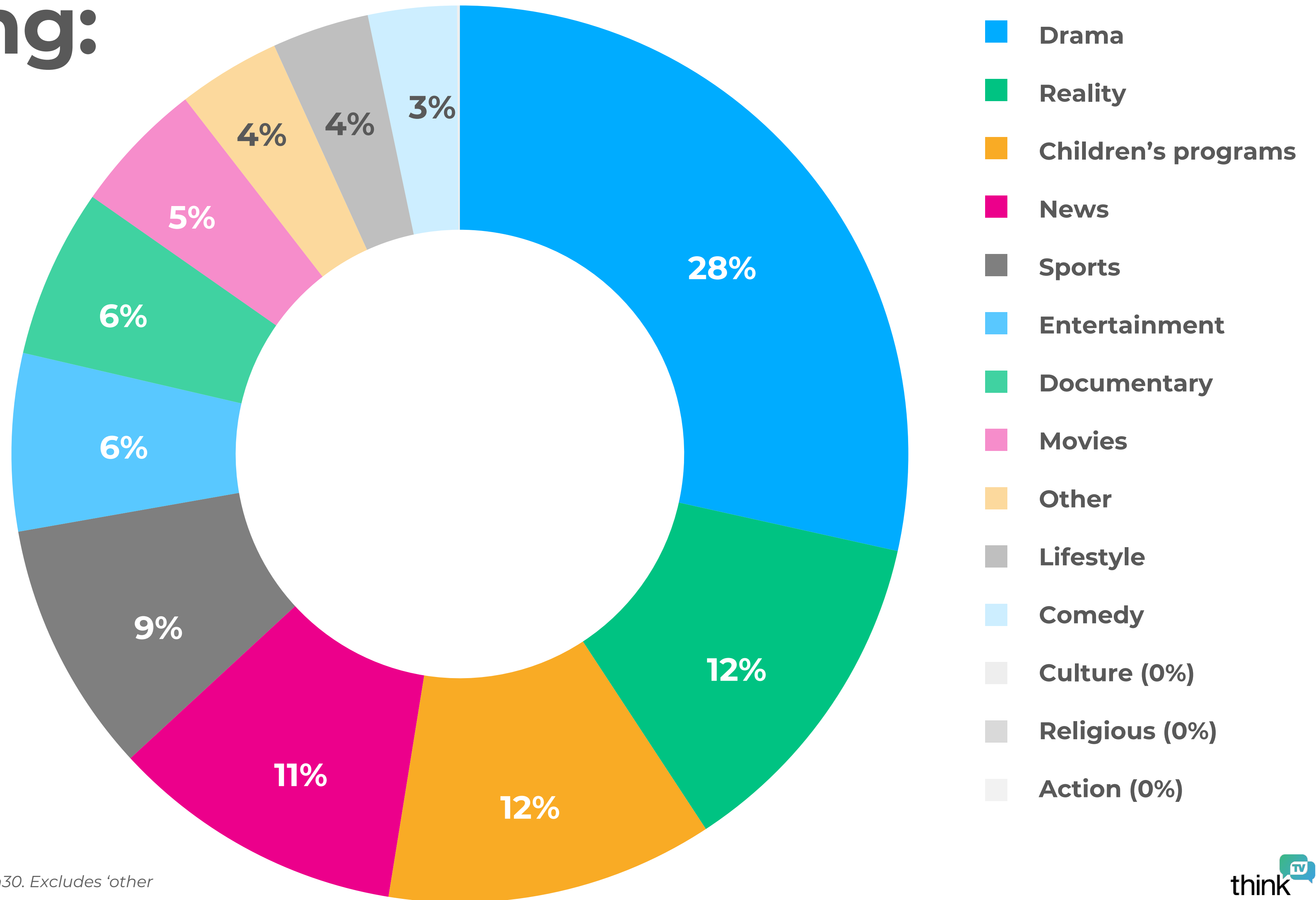
Source: OzTAM VPM 27Dec 2020 00h00 – 3 Jul 2021 23h30. Includes co-viewing on CTV devices

Demographic profiles: BVOD and Linear TV



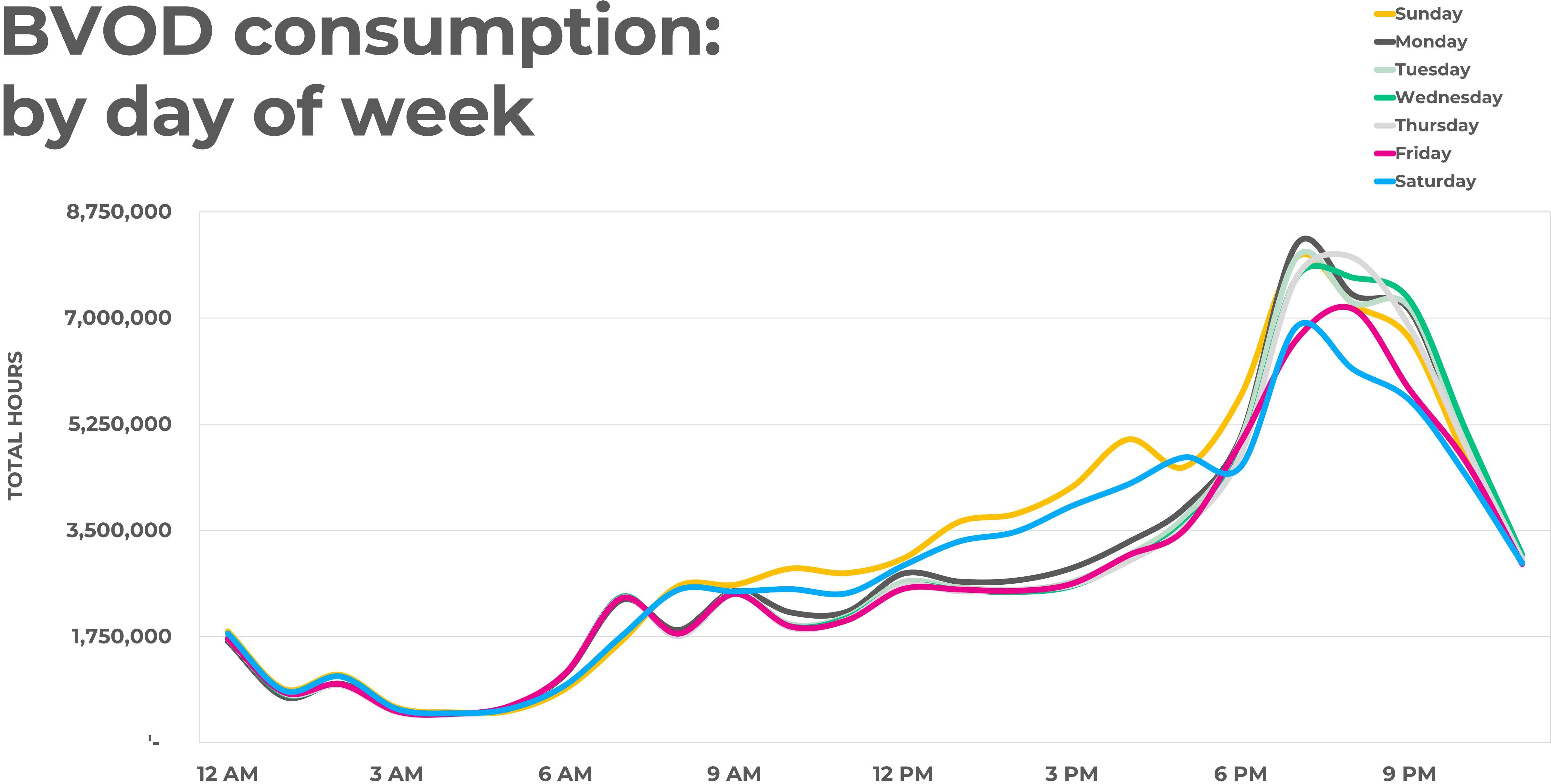
Source: OzTAM VPM 27Dec 2020 00h00 – 3 Jul 2021 23h30. OzTAM 5CM C28. 1 Jan 2021- 30 Jun 2021 . Includes co-viewing on CTV devices

Share of BVOD viewing: by genre



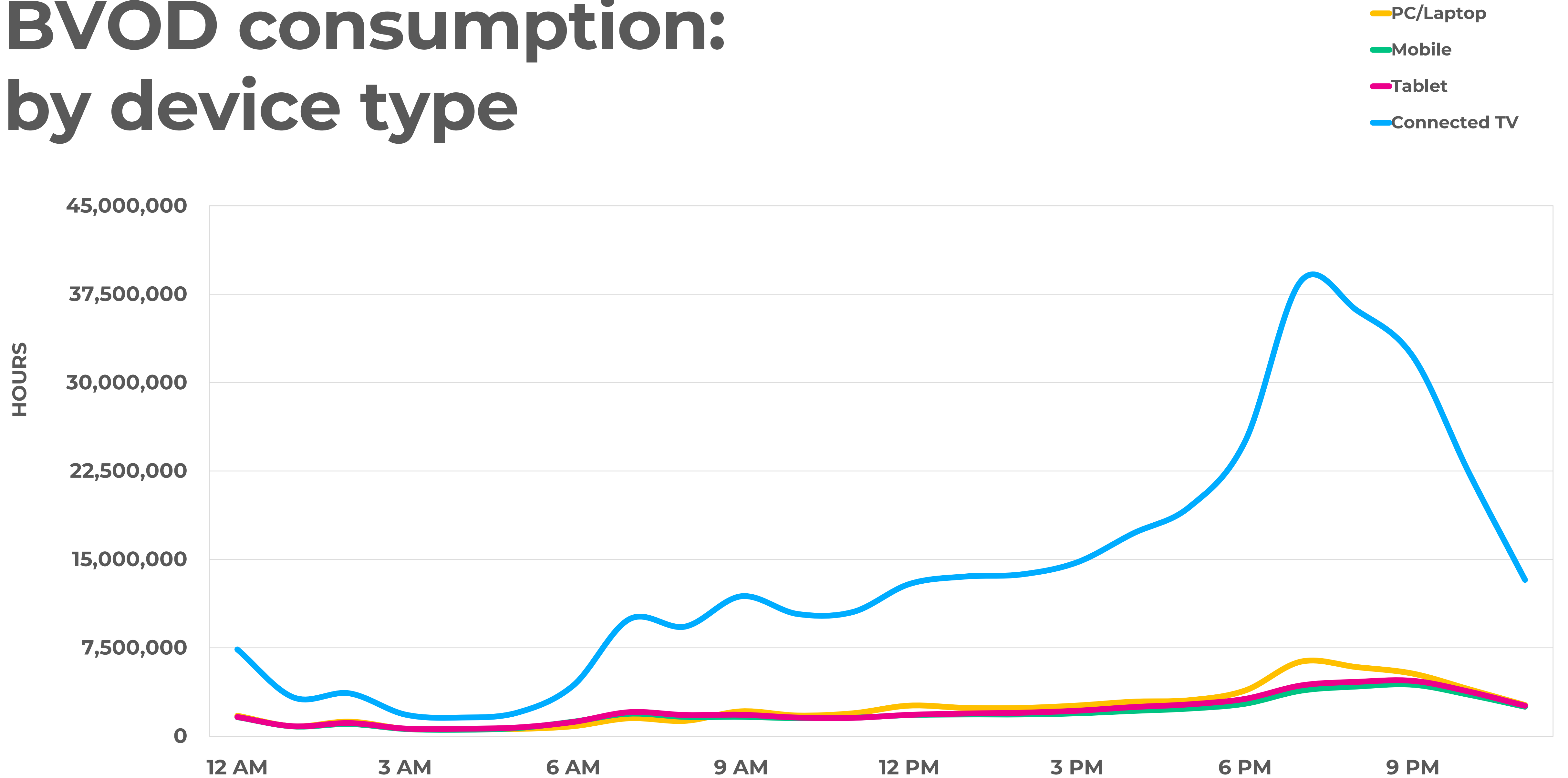
Source: OzTAM VPM VOD Viewing. 27 Dec 2021 00h00 – 30 Jun 2021 23h30. Excludes 'other program' and 'non-specified' genres.

BVOD consumption: by day of week



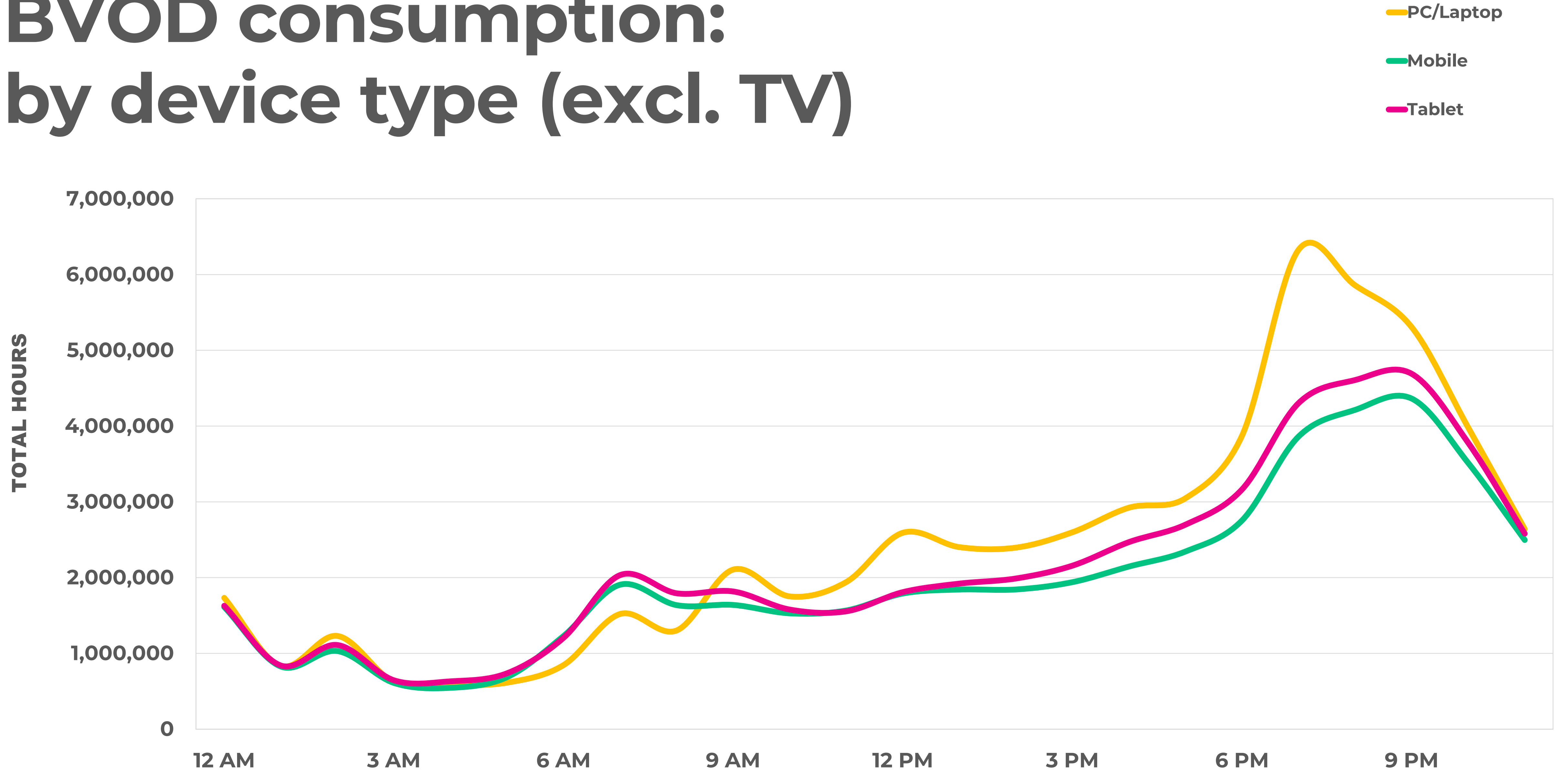
Source: OzTAM VPM. 27Dec 2020 00h00 – 3 Jul 2021 23h30. Includes co-viewing on CTV devices

BVOD consumption: by device type



Source: OzTAM VPM. 27Dec 2020 00h00 – 3 Jul 2021 23h30. Includes co-viewing on CTV devices

BVOD consumption: by device type (excl. TV)



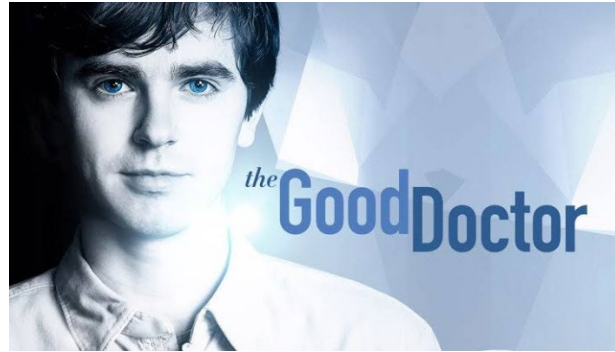
Source: OzTAM VPM. 27Dec 2020 00h00 – 3 Jul 2021 23h30. Includes co-viewing on CTV devices

Top performing BVOD programs and episodes



Top episodes	BVOD	Top episodes	BVOD	Top episodes	BVOD	Top episodes	BVOD	Top episodes	BVOD
MAFS S8E4	488,000	OPRAH (Megan & Harry)	363,000	BBRO S2E1	190,000	Friends: The Reunion	136,000	The Handmaid's Tale S4 Pigs	711,000
MAFS S8E12	456,000	MCHEF S13E1	138,000	BBRO S2E2	189,000	Mare of Easttown Ms Ladyhawk	130,000	The Handmaid's Tale S4 The Crossing	689,000
MAFS S8E1	452,000	MCHEF S13E3	129,000	BBRO S2E3	188,000	Mare of Easttown Fathers	118,000	The Handmaid's Tale S4 Nightshade	678,000

MORE TOP PERFORMERS:



Source: OzTAM VPM. 27 Dec 2020 00h00 – 30 Jun 2021 23h30 Programs are not ranked and are provided to illustrate some of the per-episode volumes being achieved in the half-yearly period.

Linear TV

H1, 2021

Who is watching linear TV?

H1, 2021 UPDATE

Who watches metro linear TV?

Universe Estimate (000s): 17,858.5

METRO LINEAR TV H1 2021 (0200-2600)	Total Ppl***	Kids*& Teens**	Ppl 16-39	Ppl 25-54	GBCH	Shopper with child****	Men	Women
Audience	1,403,000	118,000	203,000	461,000	137,000	220,000	643,000	760,000
TARP	7.9%	3.0%	3.2%	6.1%	7.1%	6.7%	7.3%	8.5%
Avg daily reach % 1min	52.6%	41.3%	32.8%	48.7%	56.3%	53.5%	50.7%	54.4%
Average time viewed (Univ)/day	1:53	0:43	0:46	1:27	1:42	1:36	1:45	2:01
Average age	54	6	31	43	45	46	53	55
Profile	100.0%	8.4%	14.5%	32.9%	9.9%	15.9%	45.9%	54.1%

* Kids - People Aged 0-12
** Teens - People Aged 13-17
*** All People - People 0+
**** Shopper with Child – Shopper 18+ with Children



Who watches regional linear TV?

Universe Estimate (000s): 7,963.9

REGIONAL LINEAR TV H1 2021 (0200-2600)	Total Ppl***	Kids*& Teens**	Ppl 16-39	Ppl 25-54	GBCH	Shopper with child****	Men	Women
Audience	753,000	56,000	79,000	206,000	60,000	88,000	351,000	402,000
TARP	9.5%	3.2%	3.4%	7.0%	7.0%	6.6%	8.9%	10.0%
Avg daily reach % 1min	55.2%	39.0%	31.8%	50.2%	52.7%	50.4%	53.7%	56.7%
Average time viewed (Univ)/day	2:16	0:45	0:49	1:41	1:41	1:35	2:08	2:24
Average age	57	7	31	44	45	46	56	57
Profile	100.0%	7.5%	10.4%	27.4%	8.1%	11.9%	46.6%	53.4%

* Kids - People Aged 0-12
** Teens - People Aged 13-17
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Who watches subscription linear TV?

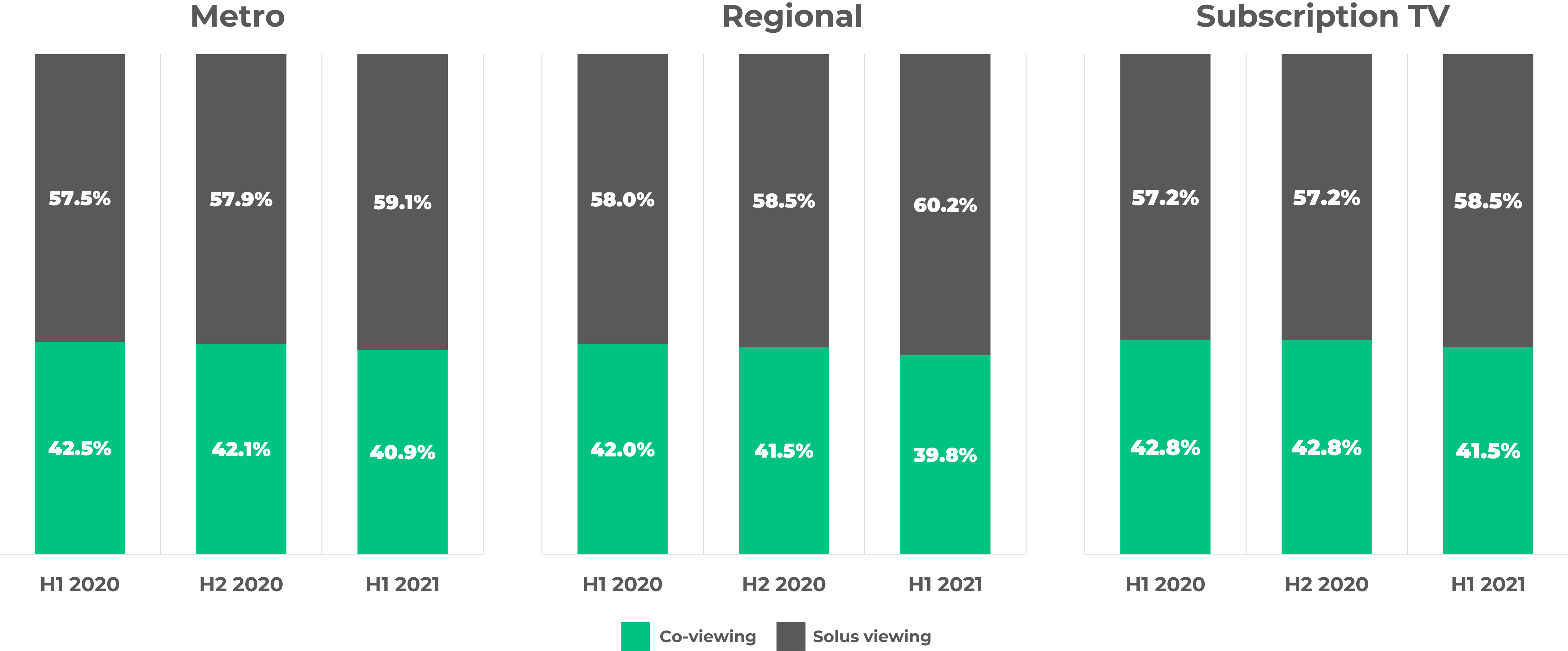
Universe Estimate (000s): 6,693.0

SUBSCRIPTION LINEAR TV H1 2021 (0200-2600)	Total Ppl***	Kids*& Teens**	Ppl 16-39	Ppl 25-54	GBCH	Shopper with child****	Men	Women
Audience	736,000	63,000	94,000	241,000	80,000	128,000	356,000	380,000
TARP	11.0%	4.2%	5.1%	9.6%	10.9%	10.3%	10.7%	11.3%
Avg daily reach % 1min	64.0%	48.2%	42.9%	64.0%	68.7%	65.9%	62.7%	65.1%
Average time viewed (Univ)/day	2:39	1:00	1:13	2:18	2:36	2:29	2:35	2:42
Average age	54	7	31	44	47	48	54	55
Profile	100.0%	8.6%	12.7%	32.7%	11.0%	17.6%	48.4%	51.6%

* Kids - People Aged 0-12
** Teens - People Aged 13-17
*** All People - People 0+
**** Shopper with Child – Shopper 18+ with Children

Source: OzTAM National STV Viewing to Total TV, 0200-2600, Consolidated 28 data, 1 Jan 2021- 30 Jun 2021, All numbers are based on the proportion of the Pay TV Universe. Universe Estimate 1 Jan 2021.

Co-viewing linear TV



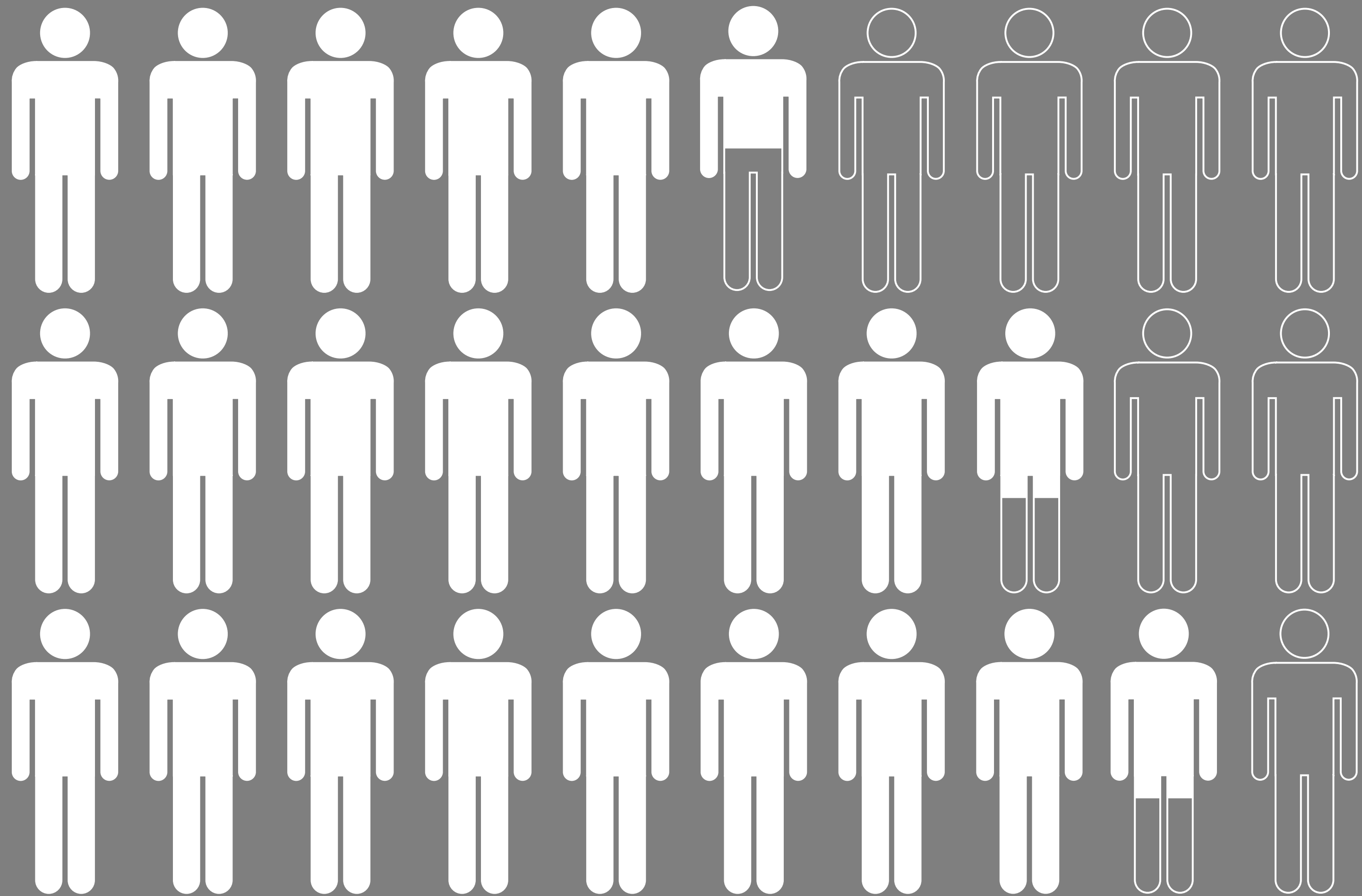
Source: OZTAM Metro and Subscription TV and Regional TAM Regional FTA+WA databases. Live viewing. Total TV. Co-viewing and Solus Viewing 1 Jan 2020- 30 Jun 2021

How many people are watching linear TV?

H1, 2021 UPDATE

METRO VIEWING BASE

Universe Estimate (000s): 17,858.5



9.35 million
Australians in a day
52.6% of the metro
population

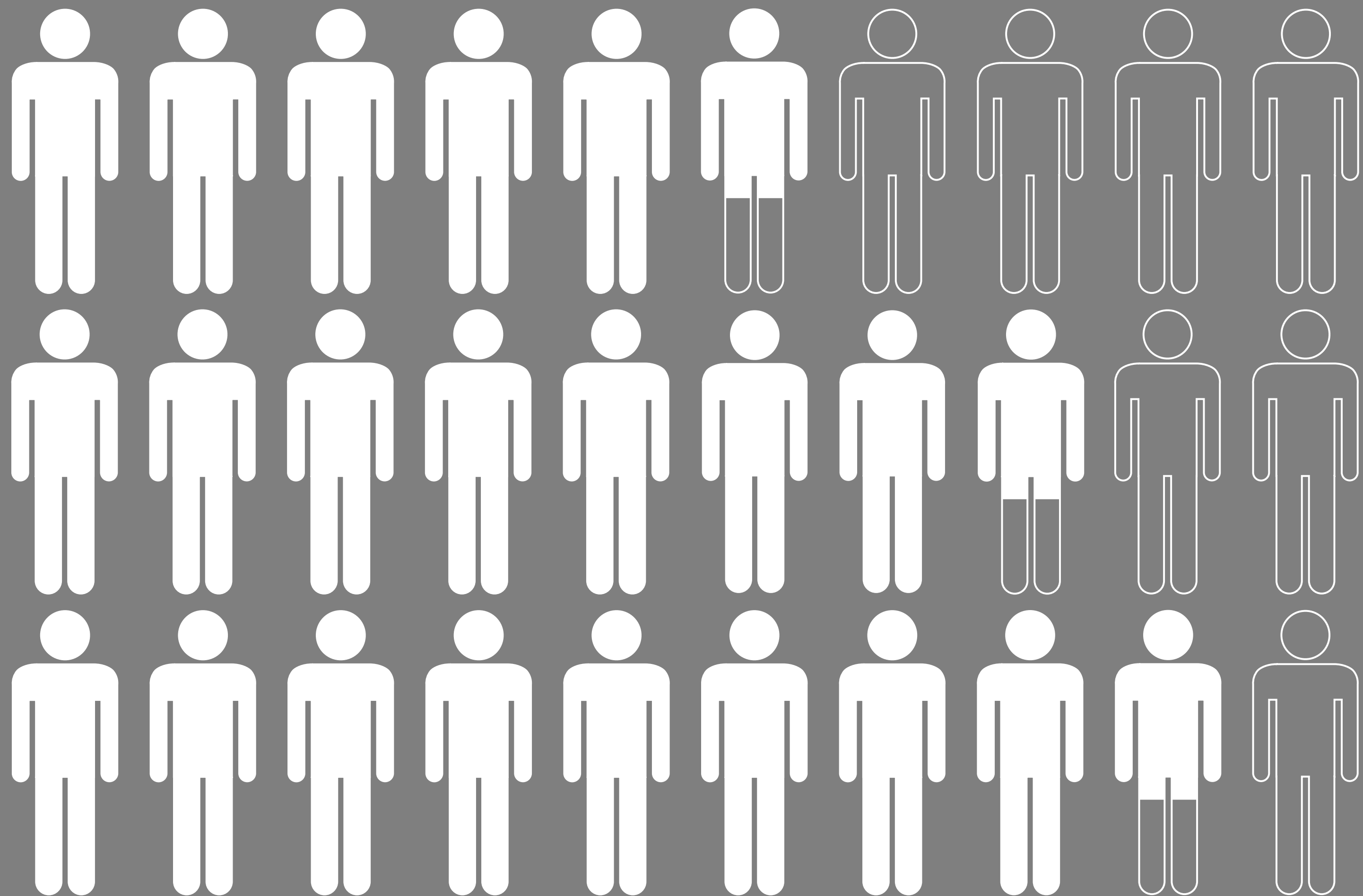
13.00 million
Australians in a week
73.1% of the metro
population

15.14 million Australians
in a month
85.1% of the metro
population

Source: OzTAM Metro, Total Ppl, 1 minute reach Total TV, Daily and Monthly Averages-0200-2600 1 Jan 2021- 30 Jun 2021. Weekly average 27 Dec 2020- 3 Jul 2021. Includes live viewing and play back 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.

REGIONAL VIEWING BASE

Universe Estimate (000s): 7,963.9



4.40 million
Australians in a day
55.2% of the regional
population

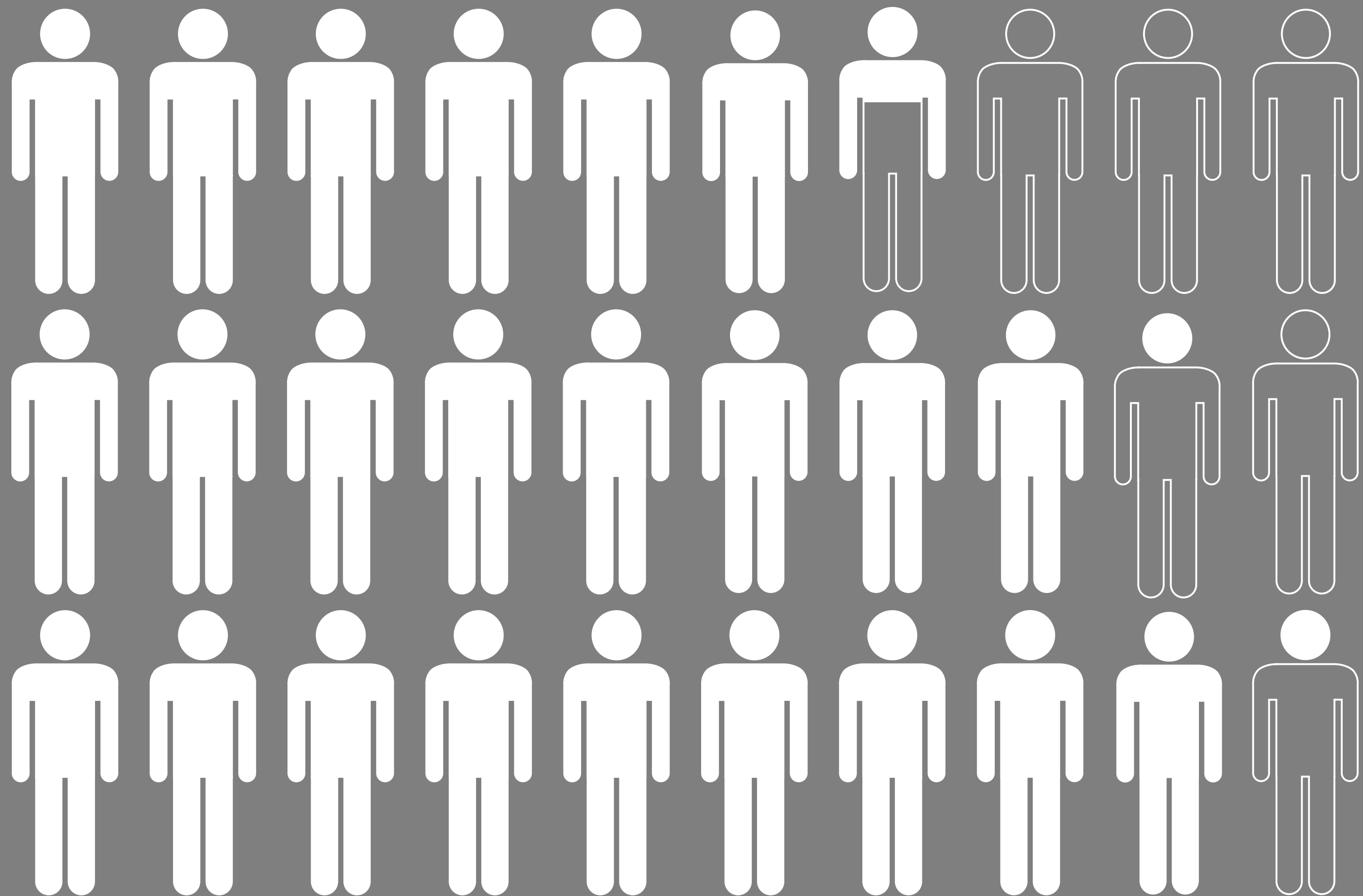
5.93 million
Australians in a week
74.5% of the regional
population

6.84 million Australians
in a month
85.9% of the regional
population

Source: Regional Tam FTA+WA, Total Ppl, 1 minute reach Total TV, Daily and Monthly Averages-0200-2600 1Jan 2021- 30 Jun 2021. Weekly average 27 Dec 2020- 3 Jul 2021. Includes live viewing and play back 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.

SUBSCRIPTION VIEWING BASE

Universe Estimate (000s): 6,693.0



4.28 million
Australians in a day
64.0% of the subscription
population

5.45 million
Australians in a week
81.5% of the subscription
population

6.06 million
Australians in a month
90.6% of the subscription
population

Source: OZTAM Subscription TV panel, Total Ppl, 1 minute reach Total TV, Daily and Monthly Averages-0200-2600 1 Jan 2021- 30 Jun 2021. Weekly average 27 Dec 2020- 3 Jul 2021. Includes live viewing and play back 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. The National Subscription numbers are based on the proportion of the Subscription TV Universe. Universe Estimate 1 Jul 2020.

Weekly cume reach

Average weekly cume reach 000s

000s	Universe estimate	Total ppl***	Kids*&Teens**	Ppl 16-39	Ppl 25-54	GBCH	Shopper with child****	Men	Women
Metro	17,858.5	13,005,000	2,586,000	3,665,000	5,415,000	1,529,000	2,547,000	6,302,000	6,703,000
Regional	7,963.9	5,929,000	1,136,000	1,279,000	2,131,000	655,000	995,000	2,871,000	3,058,000
National subscription TV	6,693.0	5,450,000	1,077,000	1,247,000	2,075,000	640,000	1,053,000	2,667,000	2,783,000

Average weekly cume reach %

%	Universe estimate	Total ppl***	Kids*&Teens**	Ppl 16-39	Ppl 25-54	GBCH	Shopper with child****	Men	Women
Metro	17,858.5	73.1%	66.2%	57.8%	71.6%	79.7%	77.4%	71.6%	74.6%
Regional	7,963.9	74.5%	63.7%	55.4%	72.8%	76.2%	74.7%	72.8%	76.1%
National subscription TV	6,693.0	81.5%	71.2%	67.3%	82.9%	87.3%	85.2%	80.4%	82.5%

* Kids - People Aged 0-12
** Teens - People Aged 13-17
*** All People - People 0+
**** Shopper with Child – Shopper 18+ with Children

Source: Average Weekly Reach for Total TV, All Day, 1-minute reach in OzTAM Metro, National STV and Regional TAM Regional FTA+WA coverage areas. Consolidated 28 data. 27 Dec 2020- 3 Jul 2021. The National Subscription numbers are based on the proportion of the STV Universe. Universe Estimate 1 Jan 2021.

How long do people watch linear TV?

H1, 2021 UPDATE

How long do people watch?

TOTAL TV VIEWING – JANUARY TO JUNE 2021 (HH:MM)

Average daily viewing	Total ppl***	Kids*&Teens**	Ppl 16-39	Ppl 25-54	GBCH	Shopper with child****	Men	Women
Metro	1:54	0:44	0:46	1:28	1:42	1:37	1:45	2:02
Regional	2:16	0:45	0:49	1:41	1:41	1:35	2:08	2:24
National Subscription TV	2:39	1:00	1:13	2:18	2:36	2:29	2:35	2:42

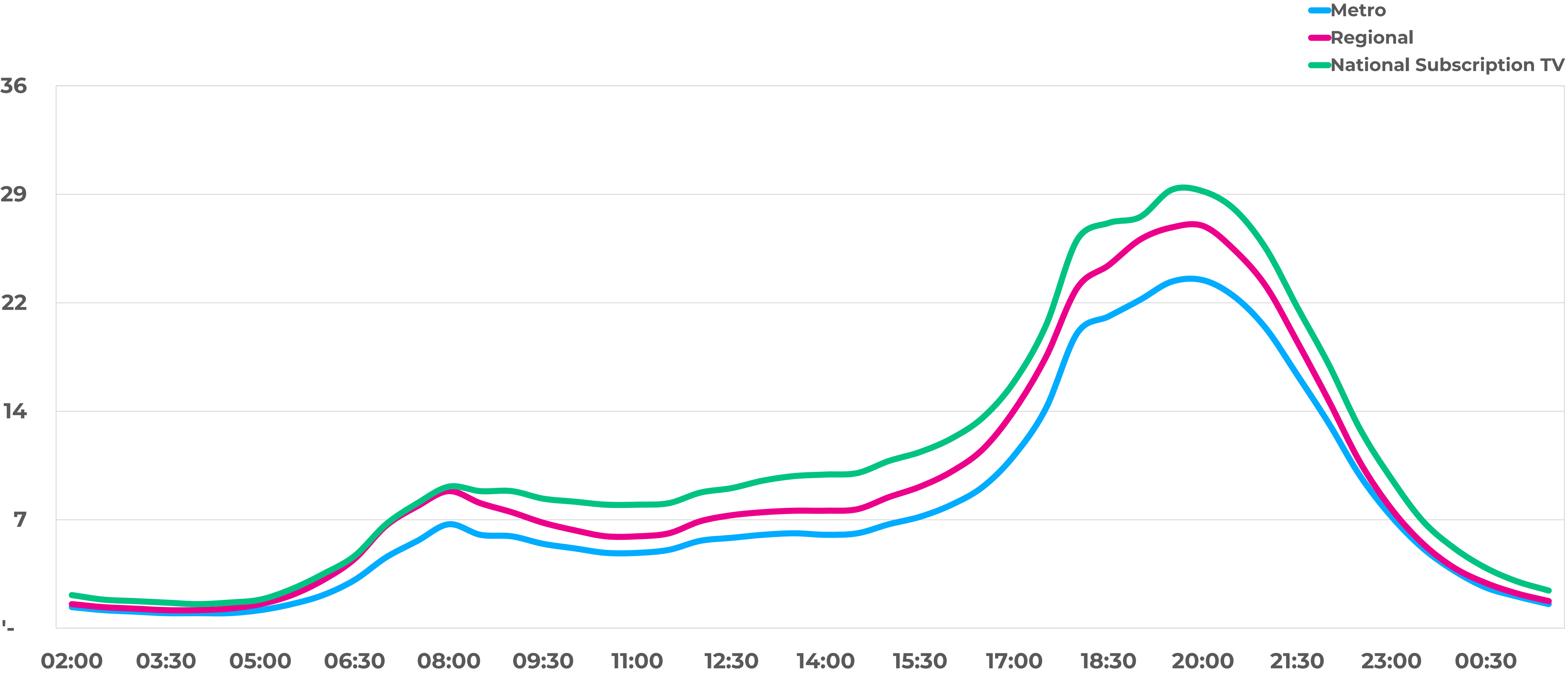
* Kids - People Aged 0-12
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Source: OZTAM Metro and Subscription TV and Regional TAM Regional FTA+WA databases.
Average time spent viewing [ATV 0200-2600 (2am -2am)] across the population in TV homes within metered markets. 1 Jan 2021- 30 Jun 2021

When do people watch linear TV?

H1, 2021 UPDATE

When do we watch?

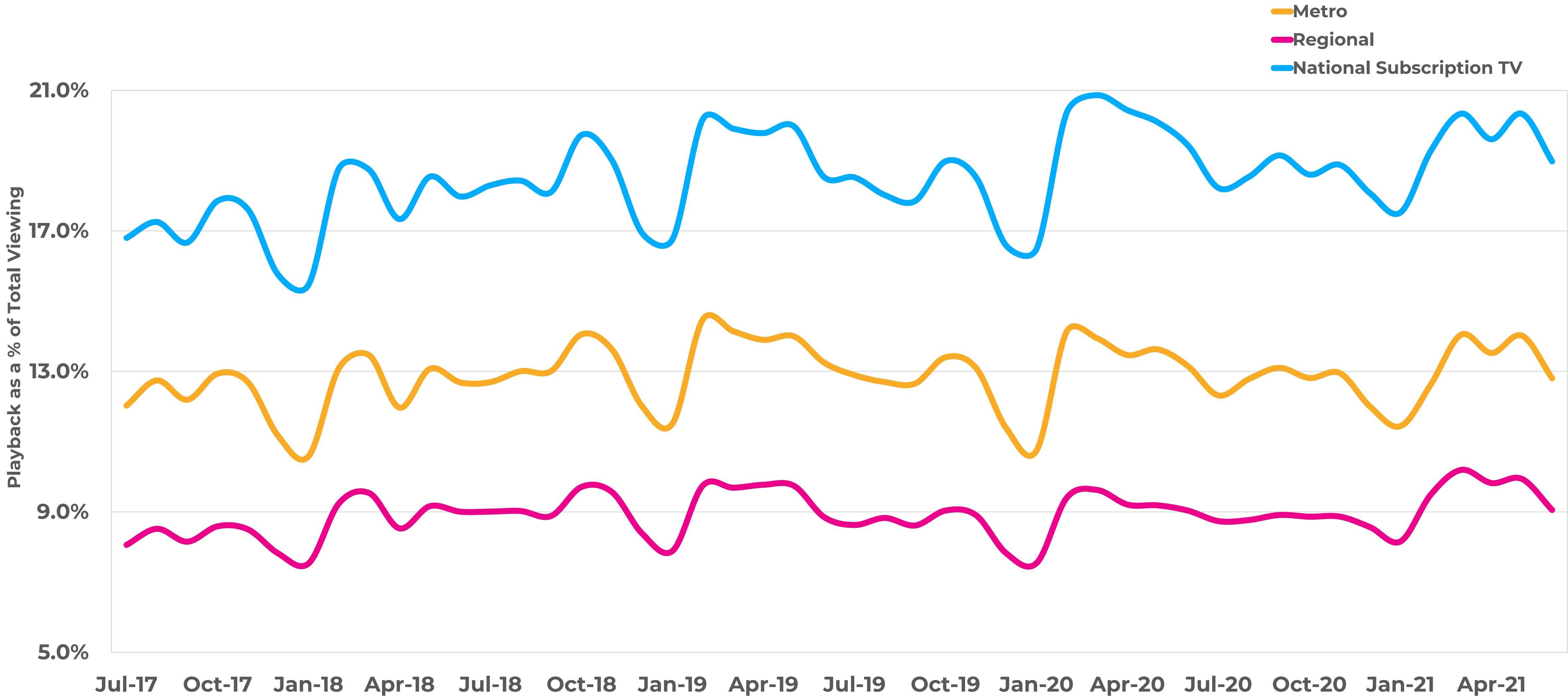


Universe estimates (000s) Metro: 17,858.5 Regional: 7,963.9 Subscription TV: 6,693.0

When do people play back linear TV?

H1, 2021 UPDATE

Play back trend

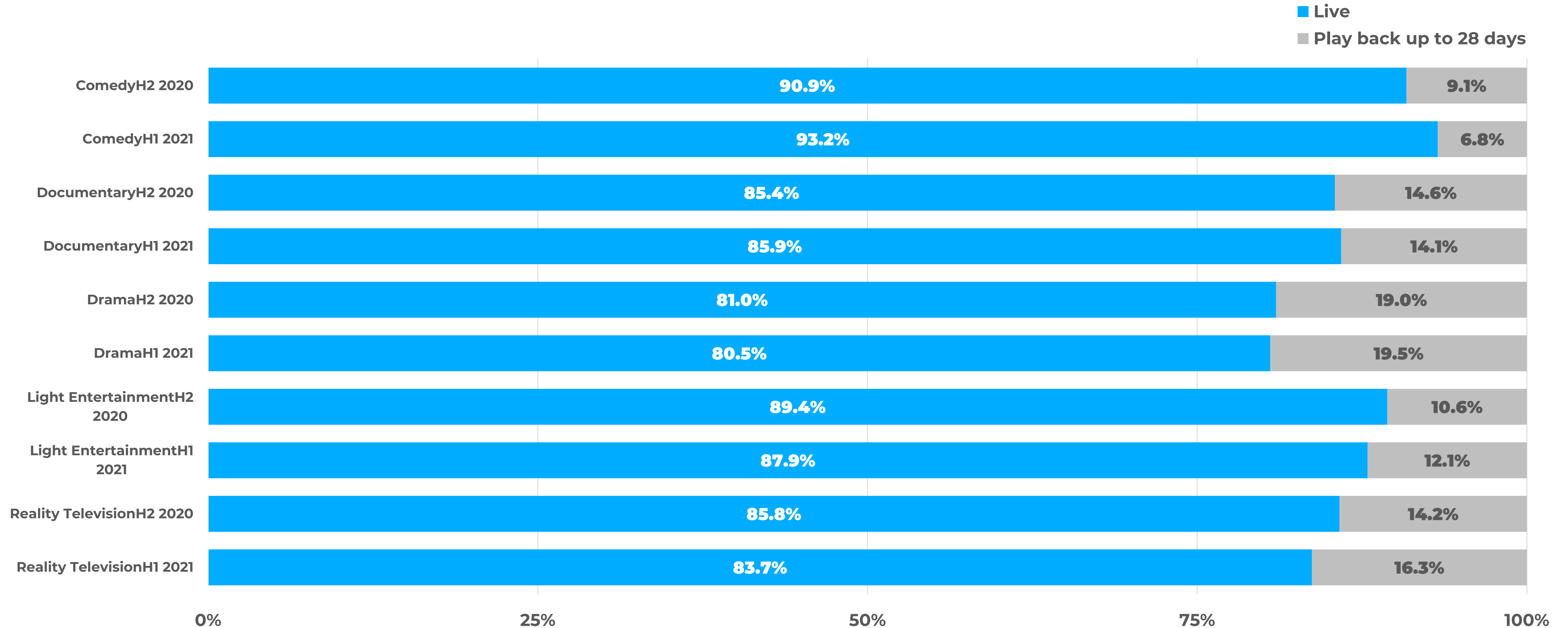


Universe estimates (000s) Metro: 17,858.5 Regional: 7,963.9 Subscription TV: 6,693.0



Source: OzTAM Metro, and National STV and Regional TAM Regional FTA+WA for % of playback to 28 days, Total TV. Jul 2017 – Jul 2021

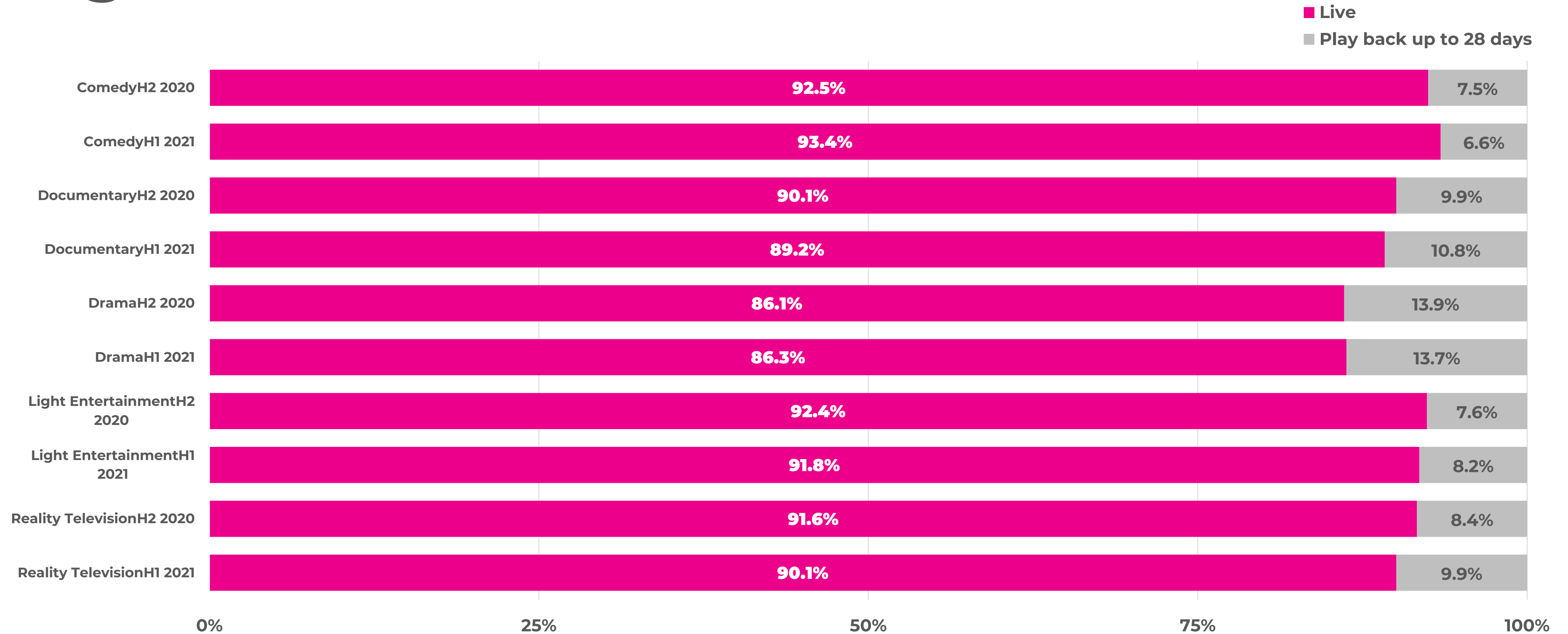
Play back by genre: metro



Source: OZTAM Metro, Total TV. 0200-2600. 1 Jul 2020- 30 Jun 2021 – 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.

Play back by genre:

regional



Source: Regional TAM Regional FTA+WA, Total TV. 0200-2600. 1 Jul 2020- 30 Jun 2021. 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.



FACT PACK
H1, 2021