

DID YOU KNOW?

CATCH-UP AND BEYOND: TELEVISION CONTENT ON DEMAND



MORE AUSTRALIANS NOW ACCESS INTERNET TV VIA CATCH-UP SERVICES THAN VIA UNOFFICIAL SOURCES LIKE BITTORRENT¹

WAYS TO WATCH TV ON DEMAND

SMART TVS

32% OF TV SALES IN 2012, UP FROM 20% IN 2011.²



1 IN 3 SONY SMART TVS NOW CONNECTED TO THE INTERNET.³

TABLETS & SMARTPHONES

MOBILE VIDEO ON THE RISE: TIME WATCHING VIDEO ON MOBILE PHONES: UP 129% (35 MINS PER MONTH Q1 2011, 1.3 HRS Q4 2011)⁴



25% OF TABLET OWNERS USE THE DEVICE TO WATCH TV⁵

COMPUTERS



GAME CONSOLES



BLU-RAY PLAYERS



1.1M AUSTRALIANS AGED 14+ USED CATCH-UP TV IN JUNE 2011, UP FROM 0.6M IN JUNE 2010⁶

FIRST FULL EPISODES OF TV CONTENT OFFERED ONLINE
2006 • MCLEOD'S DAUGHTERS (VIA CHANNEL NINE WEBSITE)

DEDICATED CATCH-UP TV PORTALS LAUNCHED

- 2008 • iVIEW
- 2010 • PLUS7, NINEMSN VIDEO AND TEN'S WATCH TV
- 2011 • SBS ON DEMAND

iVIEW IPAD APP
13,000
DOWNLOADS WITHIN TWO DAYS OF LAUNCH⁸

VIEWING BY ONLINE AUSTRALIANS⁷

OFFICIAL CATCH-UP TV SERVICES

24%

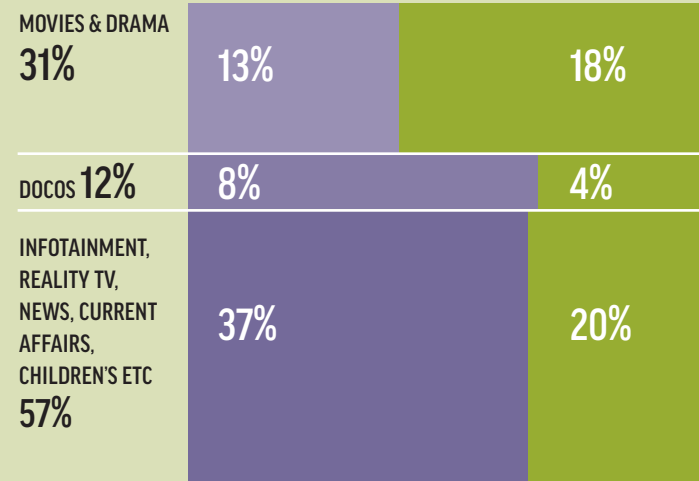
UNOFFICIAL INTERNET TV
22%

TIME-SHIFTED TV
34%

CONTENT ON CATCH-UP SERVICES IN AN AVERAGE WEEK:⁹

1,308 HOURS (49% RECENTLY BROADCAST)

● LOCAL CONTENT 58% ● FOREIGN CONTENT 42%



ADVERTISING REVENUE GROWTH, 2010 TO 2011¹⁰

ONLINE VIDEO UP 31% - \$33.4M TO \$43.7M
ONLINE UP 17% - \$2.27B TO \$2.66B

VIDEO STREAMING IS NOT CONSIDERED A BROADCASTING SERVICE UNDER THE BROADCASTING SERVICES ACT AND IS FREE FROM REGULATION STIPULATING MINIMUM LEVELS OF AUSTRALIAN CONTENT, CHILDREN'S CONTENT AND AUSTRALIAN ADVERTISING.¹¹

1. Nielsen, *The Australian Online Consumer Landscape*, March 2012.
2. GfK data in Broadcast Australia, Convergence Review submission, October 2011 & GfK, 2012, *Australia: Large screens boost value of TV market*, http://www.gfkr.com/anz/news/single_sites/009756/index.en.html.
3. Ben Holgate, 2012, 'Ten Plays Smart with IPTV Deal', *Australian Financial Review*, 23 April
4. OzTAM, *Australian Multi-screen Report*, Q4 2011.

5. PwC *Entertainment and Media Outlook*, 2011-2015.
6. Australian Communications and Media Authority, *Communications Report*, 2010-11.
7. Australians aged 16+ who have used the Internet in the last month (n=5,104); Nielsen, *The Australian Online Consumer Landscape*, March 2012.
8. Launched in December 2010; Andrew Colley, 2010, 'iPad Users Flock to ABC's iView TV Catch Up Service', *The Australian*, 7 December.

9. In February 2012. Screen Australia, *Spotlight on Catch-up TV*, June 2012.
10. PwC, 2012, *IAB Online Advertising Expenditure Report*.
11. Broadcasting Services Act 1992.