

Tuesday, 24 May 2016

TV today: free and paid, linear and on demand

95.4% of Australians watch TV—but exactly what ‘watching TV’ even means has been changing fast, Roy Morgan Research shows.

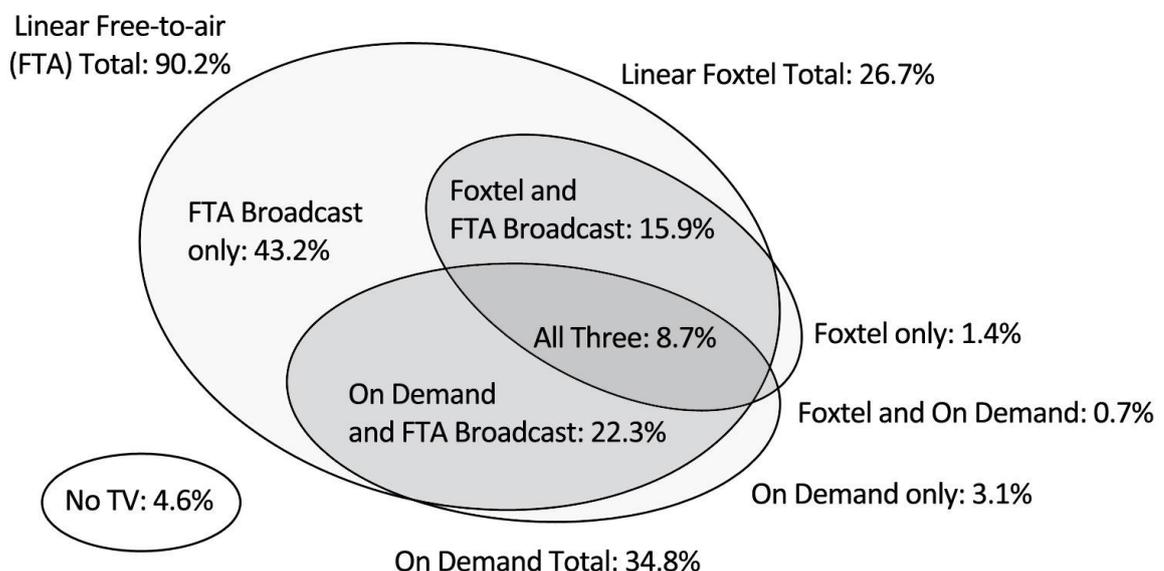
Nine in 10 Australians 14+ (90.2%) watched any ‘Linear’ free-to-air (FTA) television during an average week in the first four months of 2016: they turned a TV on and watched the broadcast from network Seven, Nine, Ten, ABC, SBS or an affiliate or secondary channel (that thing we could all once just call ‘watching TV’ without further explanation).

But over a third of Australians now watch TV ‘On Demand’ in an average four weeks (34.8%). This includes either free or paid ‘non-linear’ viewing, from the networks’ catch-up TV services to Subscription Video on Demand (SVOD), including Foxtel’s offerings. Finally, over a quarter of us watch ‘linear’ Foxtel from a set top box in an average four weeks (26.7%).

Of course, many Australians now watch TV in multiple ways. The below Venn diagram shows how many of us are watching in one, two or all three ways:

- 43.2% of Australians watch *only* traditional Linear FTA broadcasts, with no Foxtel and no On Demand. In 2016, most Linear FTA viewers now *also* watch Foxtel and/or On Demand.
- 22.3% watch Linear FTA and On Demand; 15.9% watch Linear FTA and Foxtel; and only 0.7% watch Foxtel and On Demand but no Linear FTA broadcasts.
- 3.1% watch *only* On Demand TV; and 1.4% watch *only* Foxtel.
- 8.7% of Australians now watch all three forms of TV.
- The remaining 4.6% watch no television.

Watch Any TV: 95.4%



Tim Martin, General Manager – Media, Roy Morgan Research, says:

“Since early 2015 we have been measuring with greater detail than ever before the incremental audience reach, overlap and exclusive watching of On Demand and streaming audiences.

“Now, for the first time in the Australian market Roy Morgan is able to compare and contrast the size and reach of each of FTA terrestrial television and On Demand TV including Netflix, Stan, Presto, Foxtel Go, Foxtel Play.

“This provides some really interesting insights which will be useful for broadcasters and cross platform media owners as the media landscape continues to fragment. One such insight is more people collectively watch any form of On Demand than watch Foxtel through the Set Top Box.

“Roy Morgan recently announced enhancements to its system of media measurement. The new data will transform how publishers, advertisers and media agencies understand and measure online behaviour. Underpinning the data is ‘gold standard’ research, using a probabilistic sample recruited face-to-face – simply the only way to produce results that can be reliably projected to the total population. This research is supplemented by machine based online data collected via software, as well as data collected from digital pixels placed on websites.

“This approach now captures online media visitation across all platforms, operating systems and devices to generate the most accurate and comprehensive view of online behaviour in Australia.”

To learn more about Roy Morgan’s media data call (+61) (3) 9224 5309 or email askroymorgan@roymorgan.com

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About Roy Morgan Research

Roy Morgan Research is the largest independent Australian research company, with offices throughout Australia, as well as in Indonesia, the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan Research has over 70 years’ experience in collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
5,000	±1.4	±1.2	±0.8	±0.6
7,500	±1.1	±1.0	±0.7	±0.5
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3

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50,000	±0.4	±0.4	±0.3	±0.2
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