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Fairfax Tablet Audience Insights

October 2013



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Agenda

- Australian Tablet Industry Overview
- Fairfax Tablet Apps Audience Study
 - Reach a highly engaged audience
 - Reach a premium audience
 - Fairfax Tablet Apps Drive Inspiration from Content and Advertising
 - Fairfax Tablet Apps are part of the Cross-Platform Experience
 - Tablets are primarily used during lounge times



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Industry overview



insight one



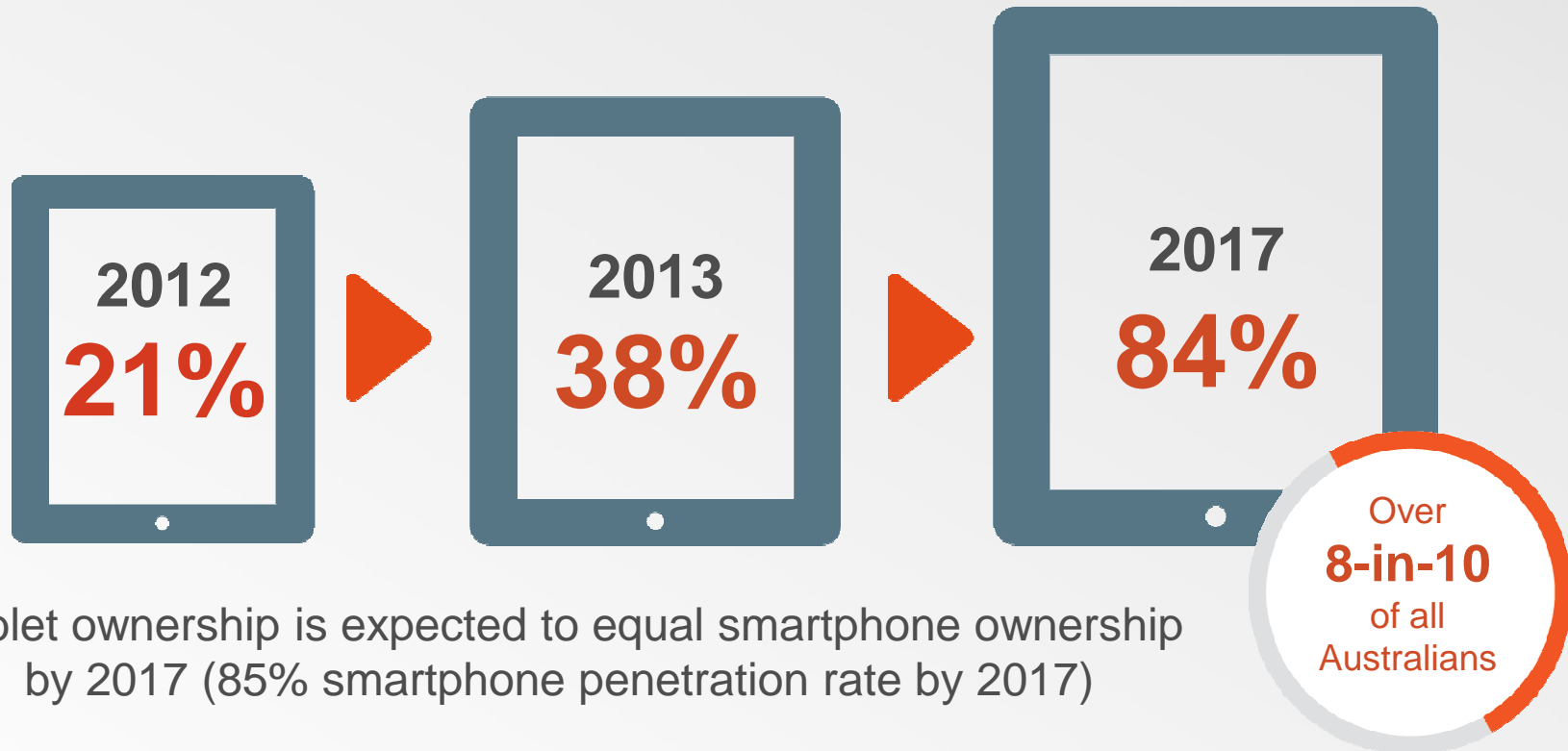
AUSTRALIAN TABLET BEHAVIOUR

On average,
Australians spend
95 MINUTES
per day on their tablet



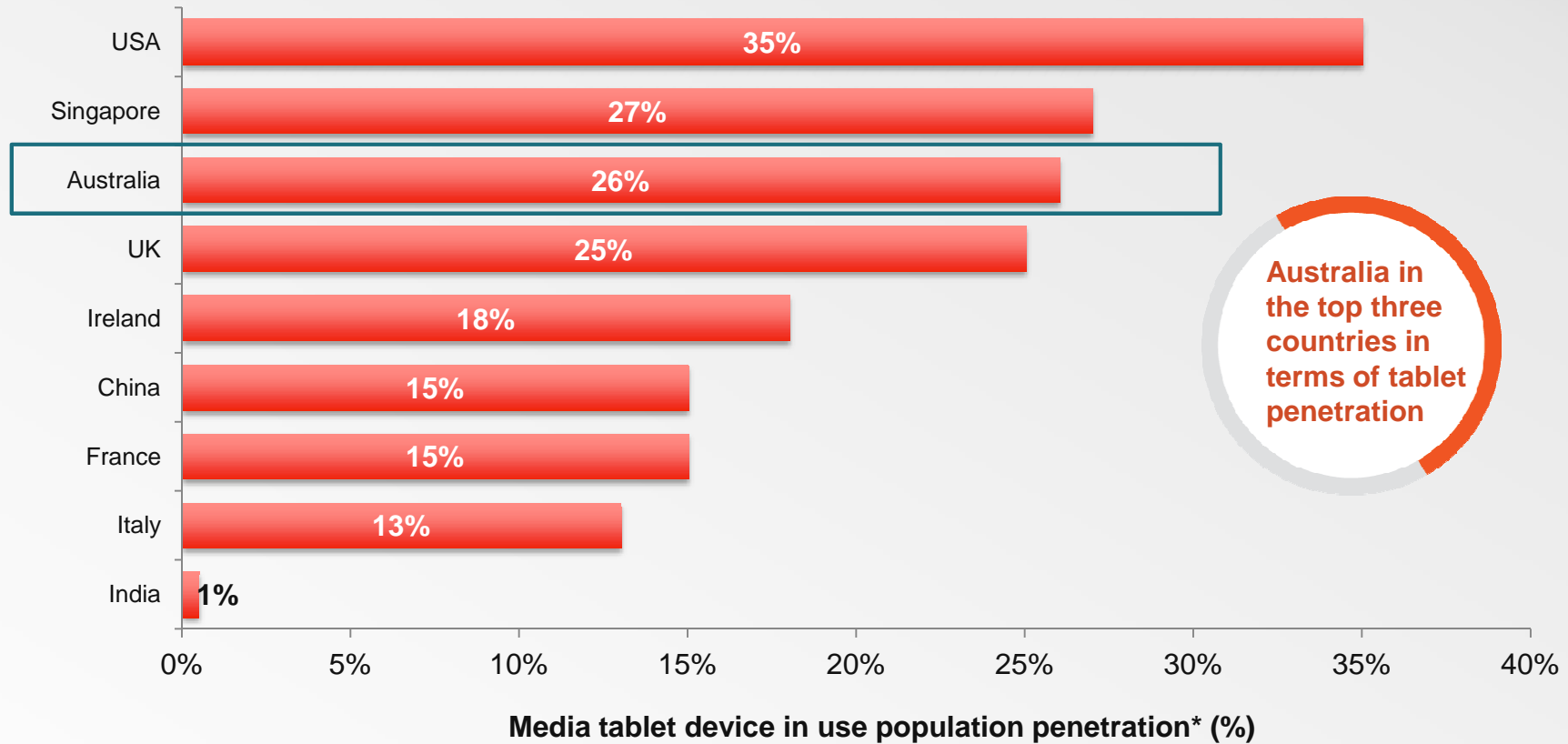
Australians expected to own a tablet device by 2017

% of Australians that own a tablet



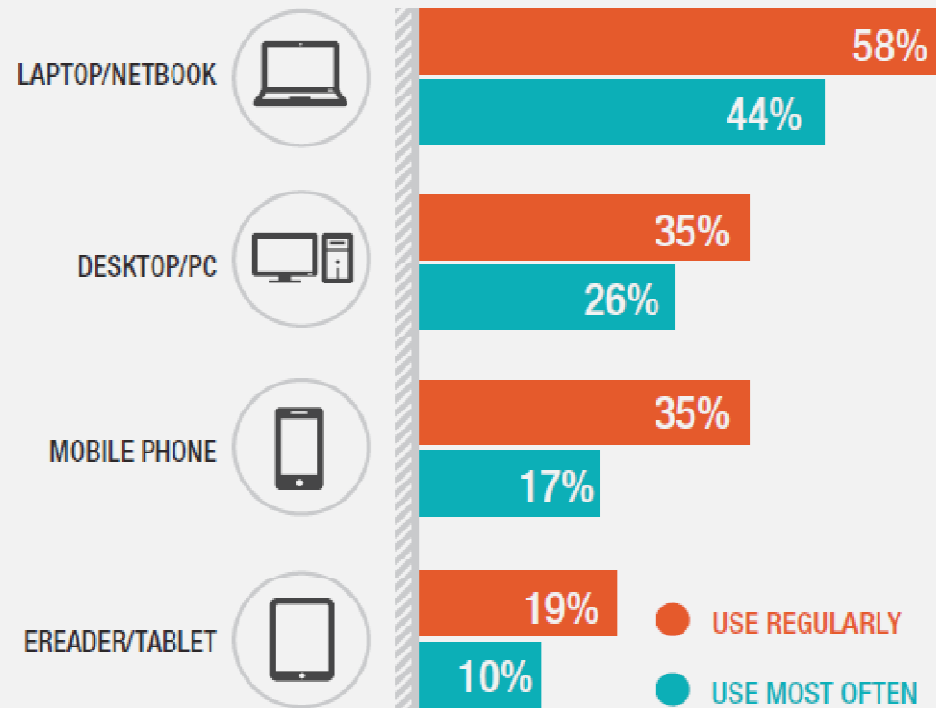
Tablet ownership is expected to equal smartphone ownership by 2017 (85% smartphone penetration rate by 2017)

Global tablet penetration rates



* Telsyte estimates of other countries are based on various source , including: Amarch Research, Eircom, eMarketer, Ericsson ConsumerLab, Millward Brown, Ofcom , Outbrain and Pew Research

Mobile devices are being partnered with the TV screen

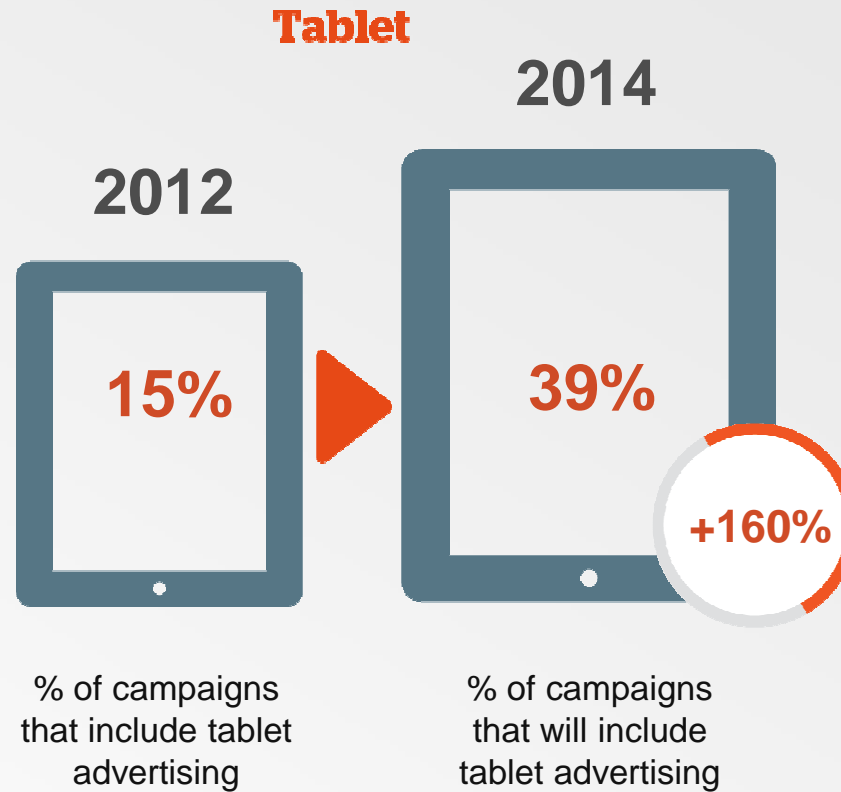


74%
of online
Australians have
simultaneously
consume TV +
internet

Use Most Often YoY Change

| 2011 | 2012 | |
|------|------|----------------|
| 13 | 17 | MOBILE PHONE |
| 5 | 10 | EREADER/TABLET |
| | | |
| 51 | 44 | LAPTOP/NETBOOK |
| 29 | 26 | DESKTOP/PC |

Australian tablet device advertising growth



Source: Australian Mobile Advertising Landscape TNS February 2013



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Tablet research

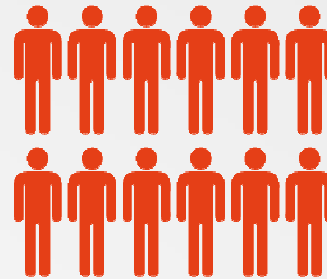


Fairfax Media Tablet Audience Study

Our aim was to explore the type and level of engagement our tablet app audience have with our tablet products and the impact that tablets and tablet usage has on their behaviour.



During
August/September
2013

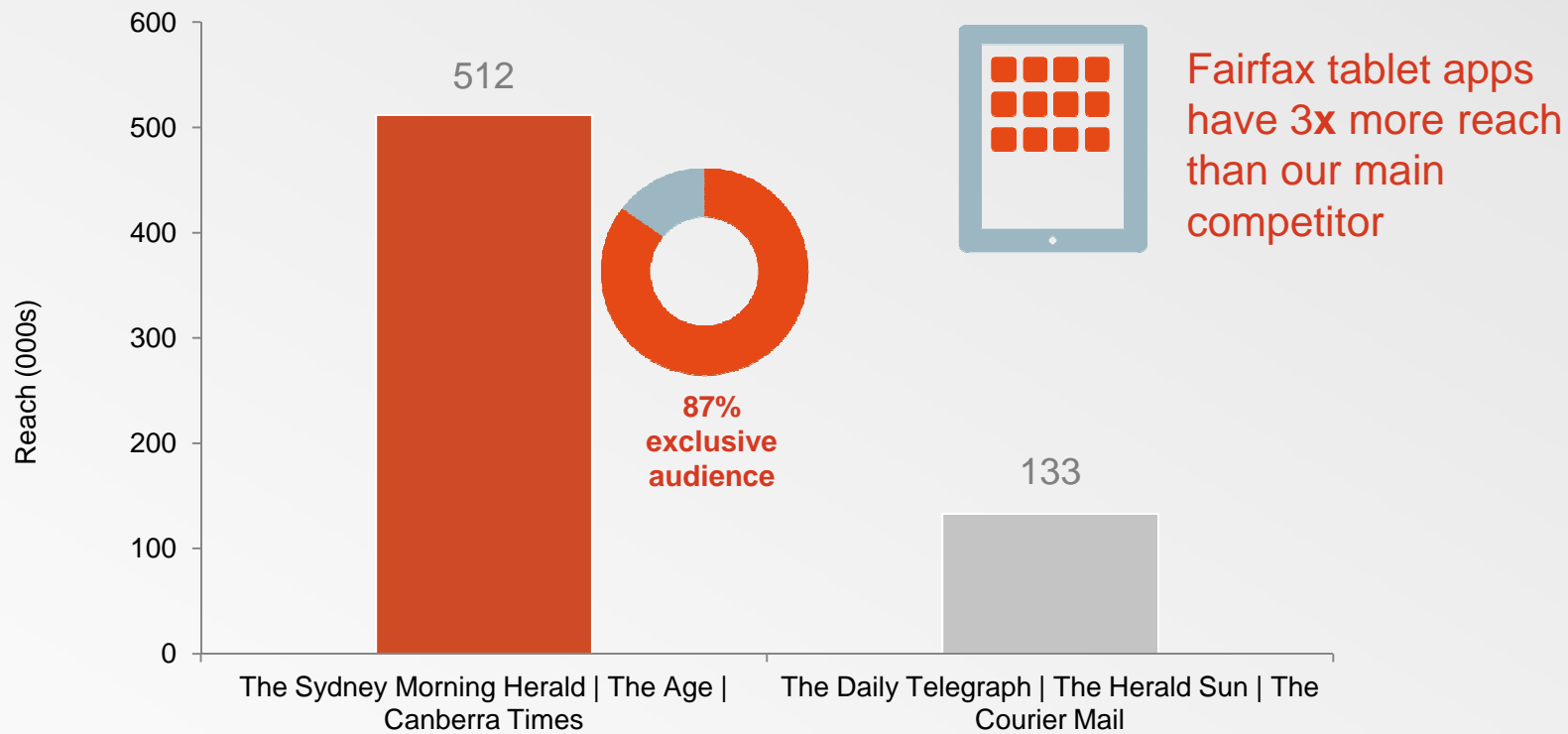


Over 15,100
respondents
completed the
survey



Incentivised by
the chance to win
iPad minis

#1 Australian News Tablet App Publisher



Source: emmaTM, conducted by Ipsos MediaCT, people 14+ for the 12 months ending Jun 2013, Nielsen Online Ratings, Jun 2013, people 14+ only. Based on Tablet-App (L4W).



insight two



FAIRFAX TABLET APPS REACH
A HIGHLY ENGAGED AUDIENCE

83% ACCESS

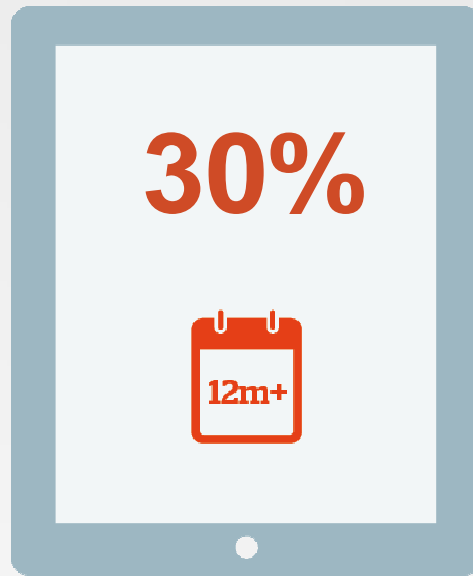
one of our **apps daily**
- it's become a daily habit,
like their morning coffee!



Fairfax tablet apps attract a loyal audience



40% have had their tablet app **since it was first released**



30% have had their tablet app for a **year to 18 months**



15% have had their tablet app for between **6 months to a year**

Source; Fairfax Media Tablet Survey, September 2013 (n=15,137)

Q. How long have you had The Age, Sydney Morning Herald or Canberra Times tablet app?

The Fairfax tablet app audience share content

82%



Have shared a news article with family / friends / work colleagues via email (compared to 57% of the Fairfax online audience)

38%



Have shared videos, photo galleries or recipes from Fairfax tablet apps via Facebook, Twitter or another social platform (37% have shared news articles)

23%



Have commented on a news article within a Fairfax tablet app

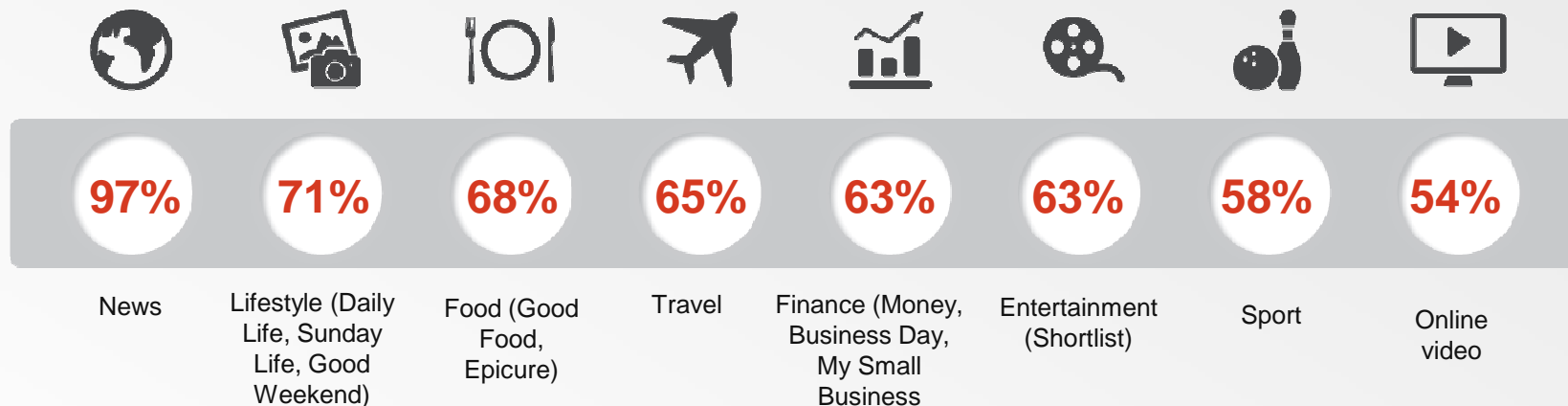
Source; Fairfax Media Tablet Survey, September 2013 (n=15,137) and Fairfax Media Social Survey May 2013 (n=2,475)
Q. Have you ever done any of the below in The Age, Sydney Morning Herald or Canberra Time tablet app? And Q. When do you visit / use The Age, Sydney Morning Herald or Canberra Times tablet apps?



A variety of tablet content consumed on tablets



Types of genres our audience consumes on Fairfax tablet apps



Source; Fairfax Media Tablet Survey, September 2013 (n=15,137)

Q. How do you consume the following types of content on The Age, Sydney Morning Herald or Canberra Times?

insight three



FAIRFAX TABLET APPS
REACH A PREMIUM AUDIENCE

The Fairfax tablet app audience is
59% MORE LIKELY
than the total population
to earn **\$100,000+**



Source: emma™ conducted by Ipsos MediaCT, people 14+ for the 12 months ending June 2013, Nielsen Online Ratings June 2013, people 14+ only.
Tablet App and Web/Mobile refer to The Age /SMH net last 4 weeks. Online Population includes users of the internet in the last 4 weeks.

Fairfax tablet apps attract educated, high income earners

| | Fairfax Tablet Apps | Online Pop |
|---------------|---------------------|------------|
| GENDER | | |
| MALE | 59% | 50% |
| FEMALE | 41% | 50% |

| INCOME | | |
|---------------|-----|----|
| \$100K+ | 15% | 6% |

| EDUCATION | | |
|------------------|-----|-----|
| Degree | 44% | 21% |

| OCCUPATION | | |
|-------------------|-----|-----|
| Mgr./Prof. | 46% | 23% |

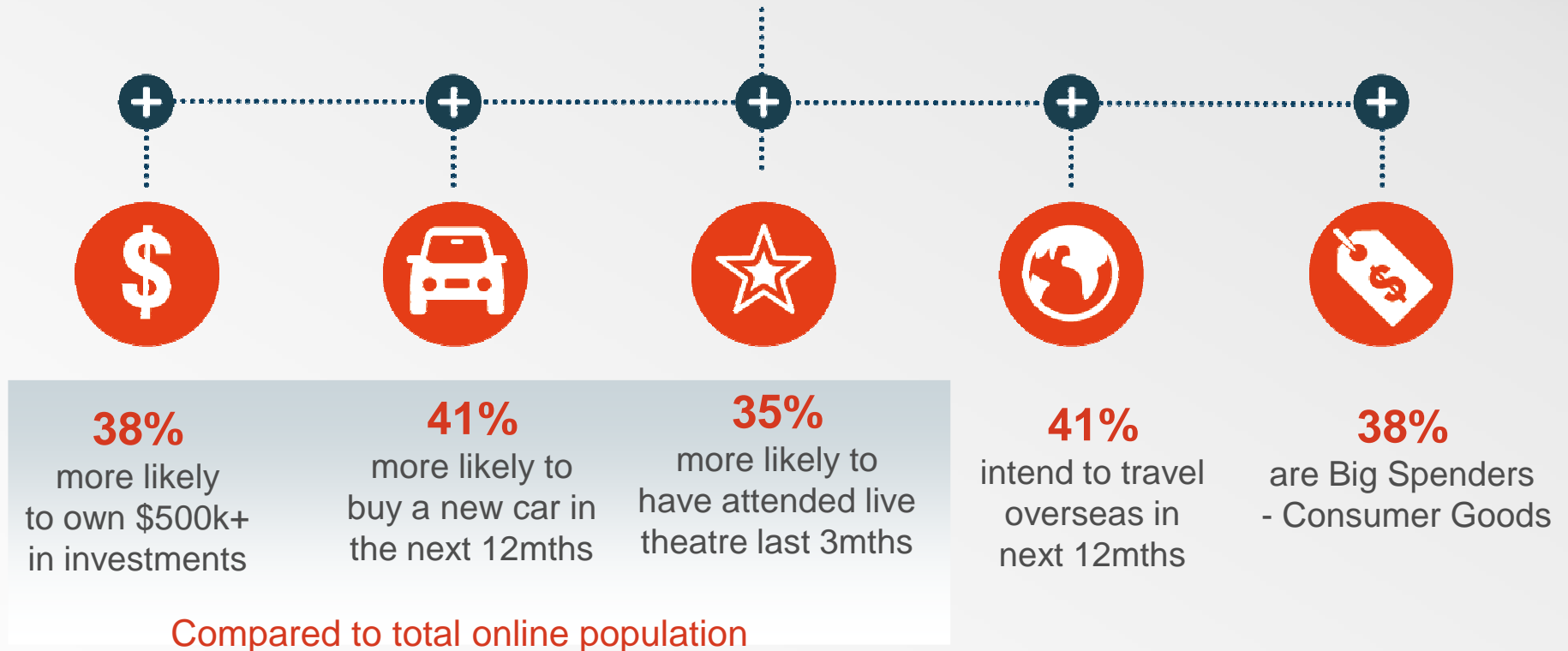
| | Fairfax Tablet Apps | Online Pop |
|------------|---------------------|------------|
| AGE | | |
| 18 – 34 | 27% | 30% |
| 35 - 54 | 43% | 35% |
| 55+ | 25% | 28% |

Source: emma™ conducted by Ipsos MediaCT, people 14+ for the 12 months ending June 2013, Nielsen Online Ratings June 2013, people 14+ only. Tablet App, Computer Web, Mobile refer to The Age /SMH net last 4 weeks. Online Population includes users of the internet in the last 4 weeks.



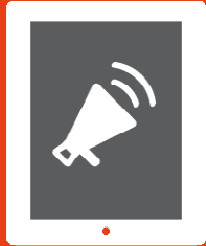
Fairfax tablet apps reach an audience of big spenders

508,000 Australians have accessed The Age or Sydney Morning Herald tablet apps in the last 4 weeks



Source: emma™ conducted by Ipsos MediaCT, people 14+ for the 12 months ending June 2013, Nielsen Online Ratings June 2013, people 14+ only. Indexes based on Online population (used internet last 4 weeks).

insight four



FAIRFAX TABLET APPS DRIVE INSPIRATION
FROM THEIR CONTENT AND ADVERTISING

49%

have **visited the website** of the
brand / product they saw advertised
in a tablet advertisement



Tablets play a role in keeping our audience inspired

Content that our audience consume on Fairfax tablet apps when they want to...

| | | | | |
|---|--------------------------------|--------|---------------|---|
|  | to be inspired | food | travel | lifestyle (Daily Life, Sunday Life, Good Weekend) |
|  | to be informed | news | finance | entertainment online video |
|  | to learn something new | food | | lifestyle (Daily Life, Sunday Life, Good Weekend) |
|  | to search for something | food | entertainment | |
|  | to research a purchase | travel | | |

Source; Fairfax Media Tablet Survey, September 2013 (n=15,137)

Q. You've indicated that you browse the following types of content on our tablet apps. Could you tell us why or what frame of mind you are generally in when you browse? Please select as many reasons as are applicable for each content category (e.g. I browse food content on The Age / SMH tablet app to search for something and to learn something new etc).



Tablets are actively engaged in the path to purchase



93%

Researched products



71%

Compared products



68%

Purchased a product



66%

Viewed a catalogue



39%

Researched product advertised on TV



33%

Clicked on advertisement in app / website

Source; Fairfax Media Tablet Survey, September 2013 (n=15,137)

Q. Have you used your tablet to do any of the following in the last 4 weeks?

Fairfax tablet app advertising drives cut-through



49%

of our tablet app audience **recalled** seeing the Subaru full page advertisement in the last 4 weeks

Source; Fairfax Media Tablet Survey, September 2013 (n=15,137)

Q. Looking at the advertisement below, do you recall seeing this ad in The Age, Sydney Morning or Canberra Times tablet apps in the last 4 weeks?



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Tablet advertising drives a brand response

49%

**Of Fairfax Media's
tablet app audience
visited the website of
the brand / product
they saw advertised**



42%

Found out
more about
a product



33%

Learnt something
new about
a product



18%

Purchased
the product
advertised



17%

Wanted to
purchase the
product advertised



16%

Requested more
information about
the product

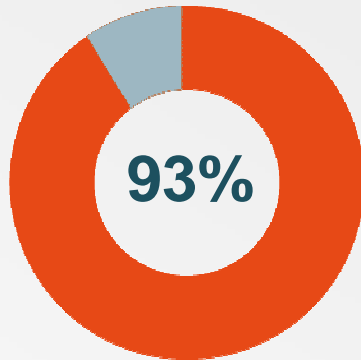


10%

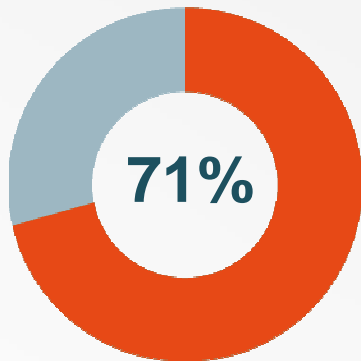
Positively changed
perception about
a brand

Source; Fairfax Media Tablet Survey, September 2013 (n=15,137)
Q. After viewing advertising in a tablet app, have you done any of the following?

Fairfax tablet apps play a key role in purchase decisions










Researched products



Compared products

Tablets are very useful for:

-  Searching for real estate **65%**
-  Movie listings **64%**
-  Planning holiday **63%**
-  Researching new car **57%**
-  Searching for job **48%**
-  Fashion / jewellery browsing **47%**
-  Luxury fashion / jewellery **45%**

Source; Fairfax Media Tablet Survey, September 2013 (n=15,137) Q. You've indicated that you browse the following types of content on our tablet apps. Could you tell us why or what frame of mind you are generally in when you browse? Please select as many reasons as are applicable for each content category (e.g. I browse food content on The Age / SMH tablet app to search for something and to learn something new etc).

insight five



FAIRFAX TABLET APPS ARE PART
OF CROSS-PLATFORM EXPERIENCE

64%

say that Fairfax tablet apps are a
natural extension of their news reading
experience on Fairfax newspapers
and websites

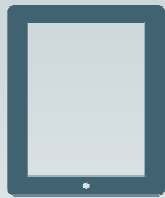


Source: Fairfax Media Tablet Survey, September 2013 (n=15,137)

Q. How do you consume the following types of content on The Age, Sydney Morning Herald or Canberra Times?

Platforms our tablet audience turn to when consuming Fairfax content

Tablet behaviour most closely mimics the newspaper reading experience



Source; Fairfax Media Tablet Survey, September 2013 (n=15,137)

Q. How do you consume the following types of content on The Age, Sydney Morning Herald or Canberra Times?

insight six



TABLETS ARE PRIMARILY USED
DURING LOUNGE & LEISURE TIMES

91%

say that they turn to their tablets when relaxing at home in the evenings & on the weekend when they have free time to leisurely browse



Source; Fairfax Media Tablet Survey, September 2013 (n=15,137)

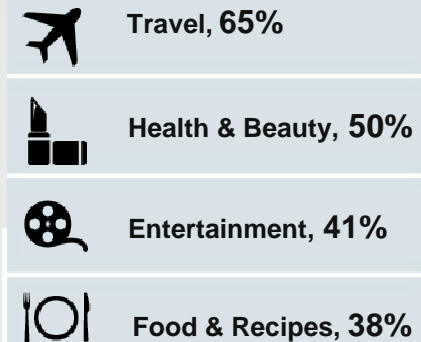
Q. Which device do you turn to when ... Relaxing at home in the evenings; Relaxing on the weekend and have some free time to leisurely browse?

Tablets are still mainly a device for personal use



Source; Fairfax Media Tablet Survey, September 2013 (n=15,137)
Q. Where do you use your tablet?

Tablet plays an important weekend role



M

T

W

T

F

S

S



News & weather most likely to be consumed every day of week (89%)



Social Networking sites (i.e. Facebook, Twitter etc), 88% access every day of the week



Sports content accessed every day of the week (74%) but 1-in-5 only watch on weekends



Business & Finance content accessed every day of the week (62%) but 30% access only on weekdays



Online video, 53% watch every day of the week

Source; Fairfax Media Tablet Survey, September 2013 (n=15,137)

Q. On what days of the week and times of day are you most likely to access the following content on your tablet?

Tablets are relied on during leisure times

When first
wake up,
67%

When
commuting,
24%

Check news
updates during
the day,
49%

Relaxing on
weekend
with time to
browse,
90%

Browsing
online while
watching
TV, **85%**

Relaxing at
home in the
evenings,
91%

Last thing
before going
to bed,
49%



Summary

- Australian's are highly engaged with tablets - an average, Australians spend 95 minutes per day on their tablet
- Fairfax tablet apps reach a highly engaged audience - 83% access one of our apps daily - it's become a daily habit, like their morning coffee!
- Fairfax tablet apps reach a premium audience - the Fairfax tablet app audience is 59% more likely than the total population to earn \$100,000+
- Fairfax tablet apps drive inspiration from their content and advertising - 49% have visited the website of the brand / product they saw advertised in a tablet advertisement
- Fairfax tablet apps are an integral part of the cross-platform experience - 64% say that Fairfax tablet apps are a natural extension of their news reading experience on Fairfax newspapers and websites
- Tablets are primarily used during the evening and weekend lounge times - 91% say that they turn to their tablets when relaxing at home in the evenings & on the weekend when they have free time to leisurely browse



Thank you