



DIGITAL LANDSCAPE





March 2018

OVERVIEW

20,405,000

People 2+ who were actively surfing online



	Among Adult Australians...	Ages 18+	Ages 18-24	Ages 25-34	Ages 35-49	Ages 50+
Total	Online Australians (000s)	17,352	2,303	3,668	4,807	6,573
	Profile %	85%	11%	18%	24%	32%
	Time per online Australian (hh:mm)	88:42	88:22	99:01	94:15	79:00
	Population Reach %	90%	99%	99%	97%	79%
Desktop	Online Australians (000s)	14,920	1,937	2,864	4,173	5,946
	Time per online Australian (hh:mm)	26:52	22:37	28:29	24:39	29:03
Smartphone	Online Australians (000s)	15,108	2,212	3,716	4,701	4,479
	Time per online Australian (hh:mm)	55:56	70:39	60:58	51:20	49:19
Tablet	Online Australians (000s)	8,316	257	1,257	2,476	4,326
	Time per online Australian (hh:mm)	31:35	58:52	62:32	30:03	29:26

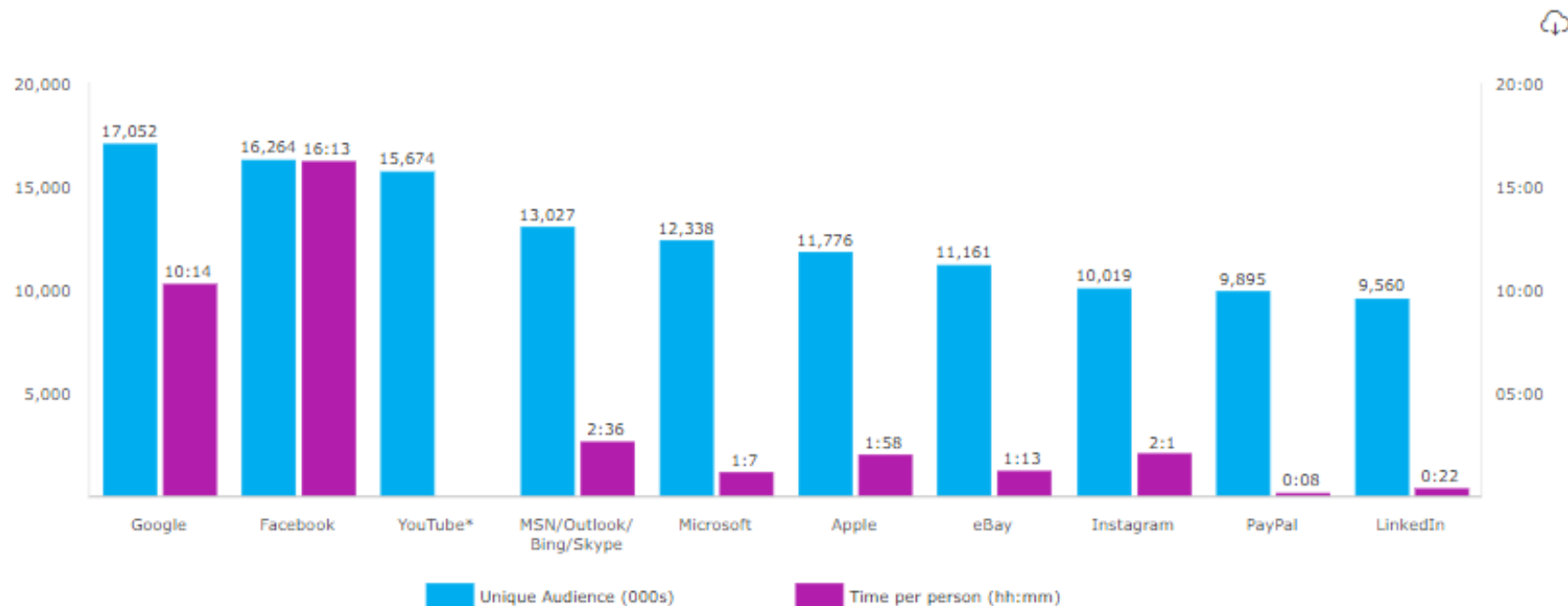
SURFING REPORT



Rank	Brands	People 2+ Unique Audience (000)	People 2+ Time per person	People 18+ Unique Audience (000)	People 18+ Time per person
	Total Audience	20,405	75:57:17	17,352	88:42:00
1	Google	19,123	9:11:33	17,052	10:14:00
2	Facebook	16,998	15:32:08	16,264	16:12:37
3	YouTube*	16,891	N/A	15,674	N/A
4	MSN/Outlook/Bing/Skype	14,074	2:25:48	13,027	2:36:19
5	Microsoft	13,131	1:03:28	12,338	1:06:38
6	Apple	12,055	1:55:44	11,776	1:58:22
7	eBay	11,381	1:12:12	11,161	1:13:16
8	Instagram	10,135	1:59:48	10,019	2:00:58
9	PayPal	10,006	0:08:23	9,895	0:08:26
10	LinkedIn	9,576	0:22:07	9,560	0:22:09

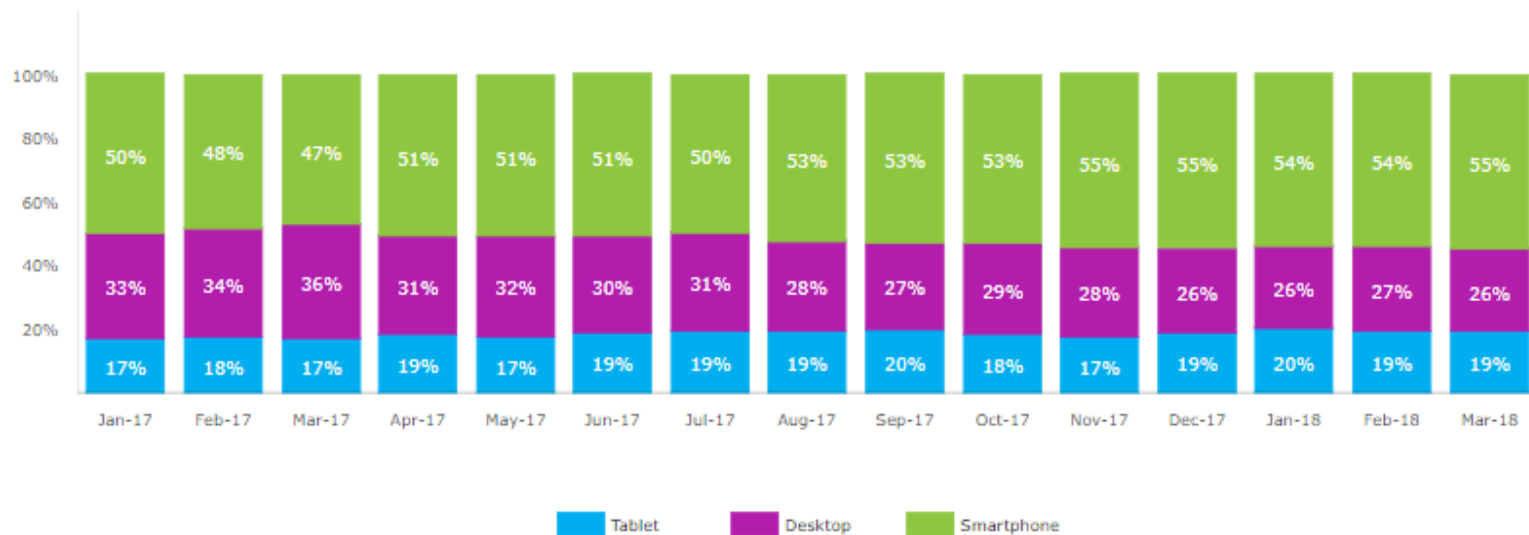
Source: Digital Ratings (Monthly) March 2018. *YouTube duration reporting is sourced from the IAB Video Report (March 2018)

UNIQUE AUDIENCE VS DURATION



Source: Digital Ratings (Monthly) March 2018 People 18+ only. *YouTube duration reporting is sourced from the IAB Video Report (March 2018)

TREND REPORT - TOTAL TIME BY DEVICE



Source: Digital Ratings (Monthly) - People 18+ - Jan-17 - Mar-18

STREAMING VIDEO MARKET LINE

Demo	Unique Audience	Population Reach (%) (ppl 18+)	Average Time Spent (HH:MM:SS)
Total 18+	15,905,832	84%	23:16:25
Total 18 - 24	2,127,196	93.00%	31:07:32
Total 25 - 34	3,413,354	94.30%	32:17:59
Total 35 - 44	3,034,105	92.40%	23:37:13
Total 45 - 54	2,888,067	90.80%	21:34:20
Total 55 - 64	2,314,720	82.20%	15:24:40
Total 65+	2,128,390	56.50%	11:18:58
Total Female 18+	8,163,194	84.90%	21:16:17
Female 18 - 24	1,068,705	95.90%	18:53:35
Female 25 - 34	1,716,577	95.10%	27:18:02
Female 35 - 44	1,519,067	92.00%	24:07:30
Female 45 - 54	1,530,683	95.10%	22:48:29
Female 55 - 64	1,250,576	87.20%	15:36:27
Female 65+	1,077,586	53.70%	14:23:36
Total Male 18+	7,742,638	83.00%	25:23:05
Male 18 - 24	1,058,491	90.20%	43:28:34
Male 25 - 34	1,696,777	93.50%	37:21:26
Male 35 - 44	1,515,038	92.80%	23:06:52
Male 45 - 54	1,357,384	86.40%	20:10:42
Male 55 - 64	1,064,144	77.00%	15:10:50
Male 65+	1,050,804	59.70%	8:09:39

Source: Digital Content Ratings – February 2018

METHODOLOGY - DIGITAL RATINGS MONTHLY

Digital Ratings (Monthly) is an audience-centric cross-device measurement solution for smartphones, tablets and PCs and is the first measurement of its kind in Australia. It leverages Nielsen's home and work panels, fused with our smartphone and tablet panels, giving an independent, cross-device view of digital media consumption.

Digital Ratings (Monthly) enables you to:

- Understand ACTUAL cross-device audience behaviour on computers, smartphones and tablets for websites and apps.
- View accurate and consistently measured volume metrics (time, sessions, page views) for all web browsing across PC, smartphone and tablet.
- Measure audience size and reach on mobile applications for the first time.

Digital Ratings (Monthly) is only measuring 'static' content across websites & applications. Video content measurement is not a function of Digital Ratings (Monthly). The Digital Ratings (Monthly) methodology is confidently and reliably able to account for on-platform measurement of audiences. On-platform refers to a publisher's owned platform assets, like their websites and their apps. This applies across all measured devices (PC, smartphone & tablet), both for browser and app.

On mobile devices only, Digital Ratings (Monthly) does not measure in-app content. When a publisher's content is consumed within a third-party app (key examples include Facebook, Twitter, Instagram) it is attributed to the third-party app as we are unable to identify the content being consumed in the app environment and assign it back to the publisher. For publisher content viewed using content delivery/aggregation platforms like Google AMP, Apple News, Facebook Instant Articles, again, audiences are only attributed to the third-party, not the publisher. Nielsen's solution for audience attribution of off-platform and in-app measurement is available in Digital Content Ratings. Within this solution, clients can implement Nielsen's Software Development Kit (SDK) on their content and receive direct measurement and attribution of their content consumed via these platforms.



METHODOLOGY: *Market Level Video Duration*



1. ESTIMATE SHARE RATIO

Average the PC v Mobile duration share for entities with both devices under measurement



2. APPLY SHARE RATIO

Apply the share ratio to the unadjusted video mobile minutes at the AU market level



3. CALCULATE

Add the PC video duration with the adjusted Mobile video duration to achieve total video minutes



4. REPORT

Market level insights delivered at a monthly frequency

WHY

Video consumption in Australia is prevalent across both PC's and mobile screens. When reporting video duration at the Australian market level the measurement solution is required to account for activity across all these screens to ensure an accurate representation of the total Australian video streaming landscape.

A key factor in calculating market level video duration is the deployment of the Nielsen SDK which is necessary for mobile coverage. Currently in Australia we have an environment with partial, but growing, SDK coverage. This means we have measurement across PC, but limited measurement across mobile.

The details below explain the methodology for calculating the total video duration for mobile at the market level. This calculation does not apply at the entity (Brand, Sub-Brand, Asset) level.

HOW IT WORKS

The market level video duration methodology uses an extrapolation model to account for the portion of unknown mobile video duration. The model is designed to be periodically updated when new entities have deployed the SDK, thus continually improving the accuracy of market level metrics (particularly for mobile devices).

The model has 4 main steps:

1. To account for the unknown mobile duration we estimate the share of video between mobile and computer. This is done by analysing data for those publishers that have mobile and PC measurement coverage to calculate a common share ratio.
2. Once a ratio has been estimated it is then applied to the unadjusted mobile total minutes for video giving a more accurate measure of mobile duration for the Australian video market.
3. Total video minutes is calculated by adding computer minutes and adjusted mobile minutes
4. Apply the updated Total Video Minutes to the Monthly Video Data file

