





# DIGITAL LANDSCAPE & VIDEO VIEWING REPORT

May 2018

## OVERVIEW

20,446,000

People 2+ who were actively surfing online

	Among Adult Australians...	Ages 18+	Ages 18-24	Ages 25-34	Ages 35-44	Ages 45-54	Ages 55-64	Ages 65+
Total	Online Australians (000s)	17,428	2,305	3,673	3,209	3,051	2,529	2,661
	Profile %	85%	11%	18%	16%	15%	12%	13%
	Time per online Australian (hh:mm)	86:37	87:58	103:20	94:49	93:32	78:40	52:04
	Population Reach %	81%	91%	94%	86%	91%	83%	56%
Desktop	Online Australians (000s)	14,932	1,849	2,709	2,817	2,874	2,373	2,039
	Time per online Australian (hh:mm)	26:36	25:35	31:49	24:36	27:40	27:16	21:46
Smartphone	Online Australians (000s)	14,916	2,235	3,660	3,033	2,493	2,389	1,106
	Time per online Australian (hh:mm)	56:40	71:33	64:15	56:34	53:59	41:57	39:31
Tablet	Online Australians (000s)	8,179	363	919	964	2,696	2,027	1,210
	Time per online Australian (hh:mm)	32:52	37:45	71:45	43:50	22:12	24:47	30:24

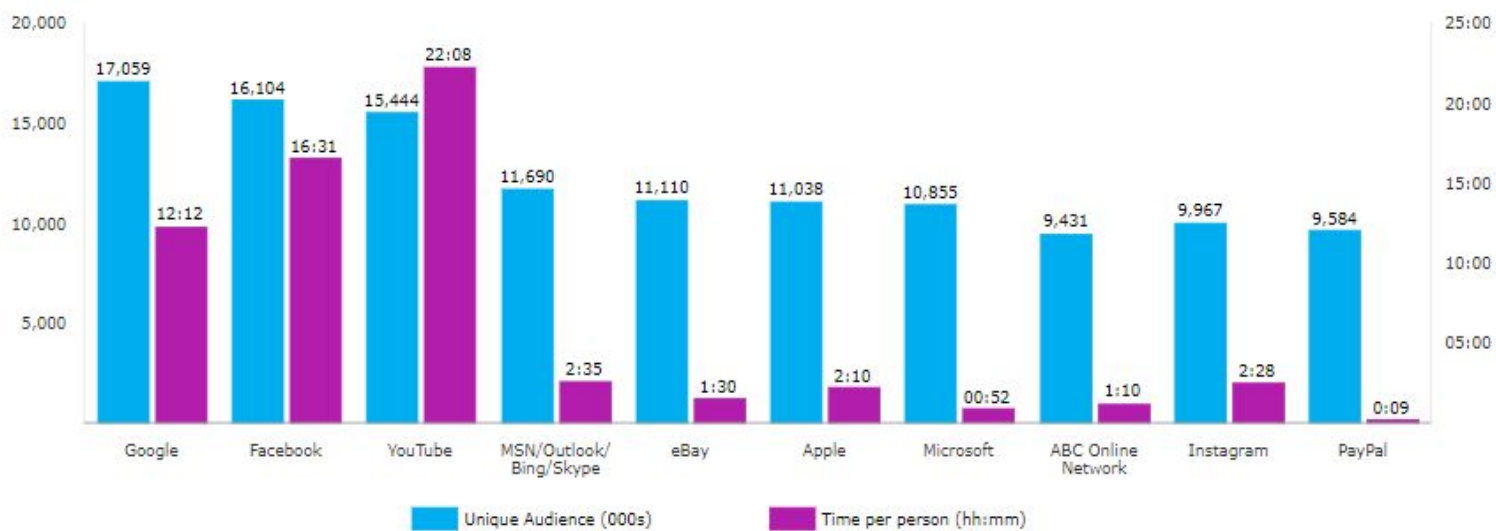
Source: NIELSEN DIGITAL PANEL (FORMERLY DIGITAL RATINGS MONTHLY) May 2018.

# SURFING REPORT

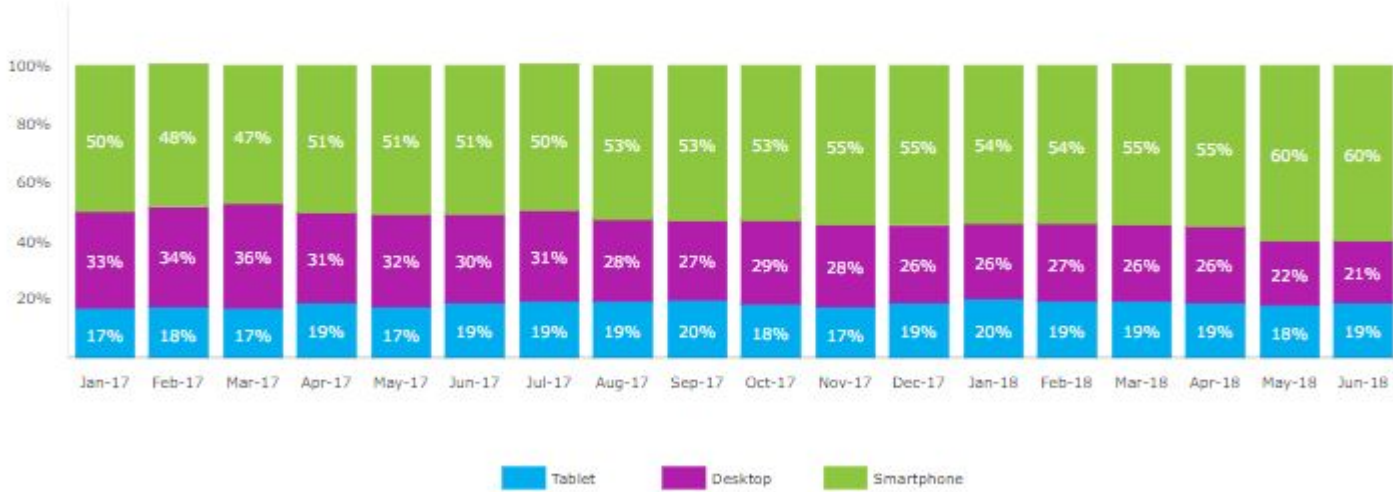
Rank	Brands	People 2+ Unique Audience (000)	People 2+ Time per person	People 18+ Unique Audience (000)	People 18+ Time per person
	Total Audience	20,446	59:08:00	17,428	63:51:00
1	Google	19,107	10:49:00	17,059	12:12:00
2	Facebook	16,824	15:50:00	16,104	16:31:00
3	YouTube	16,317	22:34:14	15,444	22:08:09
4	MSN/Outlook/Bing/Skype	12,471	2:27:00	11,690	2:35:00
5	eBay	11,433	1:28:00	11,110	1:30:00
6	Apple	11,236	2:08:00	11,038	2:10:00
7	Microsoft	11,137	0:05:53	10,855	52:22:00
8	ABC Online Network	10,323	1:12:20	9,431	1:10:11
9	Instagram	10,085	2:25:00	9,967	2:28:00
10	PayPal	9,704	0:09:20	9,584	0:09:23

Source: Digital Content Ratings, Text, May 2018, People 2+, Monthly Total.

# UNIQUE AUDIENCE VS DURATION



# TREND REPORT - TOTAL TIME BY DEVICE



Source: Digital Content Ratings, Text, June 2018, People 2+, Monthly Total. \*YouTube duration reporting is sourced from DCR Monthly Total.

# STREAMING VIDEO MARKET LINE

## STREAMING VIDEO MARKET LINE - MAY 2018

Demo	Unique Audience	Population Reach (%) (ppl 18+)	Average Time Spent (HH:MM:SS)
Total 18+	15,874,038	82%	27:05:03
Total 18 - 24	2,113,231	90.8%	39:07:39
Total 25 - 34	3,495,978	94.2%	40:35:51
Total 35 - 44	2,819,017	86.0%	27:01:29
Total 45 - 54	2,926,749	90.9%	22:00:14
Total 55 - 64	2,376,975	82.9%	16:54:29
Total 65+	2,142,088	55.5%	11:27:37
Total Female 18+	8,197,814	83.6%	23:49:04
Female 18 - 24	1,028,691	90.3%	21:24:39
Female 25 - 34	1,792,624	96.2%	33:27:03
Female 35 - 44	1,486,932	90.5%	30:45:12
Female 45 - 54	1,541,307	93.8%	19:46:26
Female 55 - 64	1,251,384	85.3%	19:45:36
Female 65+	1,096,876	53.5%	11:14:31
Total Male 18+	7,676,224	81.2%	30:34:21
Male 18 - 24	1,084,540	91.2%	39:07:39
Male 25 - 34	1,703,354	92.1%	40:35:51
Male 35 - 44	1,332,085	81.5%	27:01:29
Male 45 - 54	1,385,442	87.9%	22:00:14
Male 55 - 64	1,125,591	80.5%	16:54:29
Male 65+	1,045,212	57.9%	11:27:37

Source: Digital Content Ratings, Video, May 2018, People 18+, Monthly Total

# STREAMING REPORT – MONTHLY TOTAL

## STREAMING REPORT

Brand	Unique Audience**	Population Base	Population Reach % (Ppl 18+)
Market Total	9,225,697	19,262,100	48.7%
YouTube	7,683,589	19,262,100	39.9%
Facebook	4,298,893	19,262,100	22.3%
news.com.au*	1,687,233	19,262,100	8.8%
BuzzFeed*	1,658,187	19,262,100	8.6%
Business Insider*	1,518,939	19,262,100	7.9%
Vimeo Websites	1,448,633	19,262,100	7.5%
Netflix	827,296	19,262,100	4.3%
nine.com.au	780,417	19,262,100	4.1%
ABC Online Network	686,519	19,262,100	3.6%
9Now*	645,671	19,262,100	3.4%
Twitter	611,069	19,262,100	3.2%
MSN/Outlook/Bing/Skype	582,576	19,262,100	3.0%
Daily Mail Australia*	512,408	19,262,100	2.7%
SBS (Special Broadcasting Service)*	474,149	19,262,100	2.5%
taste.com.au*	321,084	19,262,100	1.7%
Openload	314,321	19,262,100	1.6%
Vice Media Network*	307,392	19,262,100	1.6%
smh.com.au	276,038	19,262,100	1.4%
TenPlay*	254,973	19,262,100	1.3%
Google	220,806	19,262,100	1.1%
TwitchTV	217,557	19,262,100	1.1%
SWM 7	208,614	19,262,100	1.1%
Time Inc. Network	197,628	19,262,100	1.0%
Herald Sun*	195,527	19,262,100	1.0%
Telstra Media	188,944	19,262,100	1.0%

NOTE: For consistency in ranking, this report only contains video data for computer devices measured via panel. Video consumed on mobile devices is currently unable to be measured via panel and is hence excluded from these rankings.

Source: Digital Content Ratings, Video, May2018, People 18+, Panel, Computer ONLY

\*Brands marked with an asterisk represent metrics from tagged methodology.

\*\*The Unique Audience figure is non-ad supported content.

# STREAMING REPORT – MONTHLY TAGGED

## STREAMING REPORT

Brand	Unique Audience**	Population Base	Population Reach % (Ppl 18+)
Market Total*	15,988,581	19,262,100	83.0%
news.com.au	3,018,526	19,262,100	15.7%
9Now	1,506,371	19,262,100	7.8%
Daily Mail Australia	961,931	19,262,100	5.0%
SBS (Special Broadcasting Service)	580,947	19,262,100	3.0%
taste.com.au	510,190	19,262,100	2.6%
TenPlay	427,791	19,262,100	2.2%
The Roar	375,279	19,262,100	1.9%
Herald Sun*	305,438	19,262,100	1.6%
The Daily Telegraph	298,678	19,262,100	1.6%
Whimn	275,290	19,262,100	1.4%
Mamamia	271,864	19,262,100	1.4%
couriermail.com.au	261,467	19,262,100	1.4%
AdelaideNow	218,792	19,262,100	1.1%
Cricket Network	103,579	19,262,100	0.5%
NT News	96,802	19,262,100	0.5%
Lost At E Minor.TV	61,147	19,262,100	0.3%
Gold Coast Bulletin	51,294	19,262,100	0.3%
THE AUSTRALIAN	48,260	19,262,100	0.3%
The Cairns Post	34,977	19,262,100	0.2%
Townsville Bulletin	30,992	19,262,100	0.2%
themercury.com.au	25,869	19,262,100	0.1%
Geelong Advertiser.com.au	23,529	19,262,100	0.1%
BuzzFeed	22,856	19,262,100	0.1%
Techly	15,518	19,262,100	0.1%
Lost At E Minor	14,944	19,262,100	0.1%

NOTE: Due to sample size limitations, demographic profiling of the tablet video market line is not included

NOTE: For consistency, market line metrics are based on people 18+ due to an inability to measure people under 18 via panel on mobile devices.

Source: Digital Content Ratings, Video, May2018, People 18+, Panel + Census, Digital (C/M)

\*Unique Audience data at the total market level IS deduplicated, however at device level data is NOT duplicated e.g. sum of tablet + smartphone + PC will not equal total.

Excludes any secondary crediting content

\*\*The Unique Audience figure is ad-supported content.



## METHODOLOGY - NIELSEN DIGITAL PANEL (FORMERLY DIGITAL RATINGS MONTHLY)

Nielsen Digital Panel 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.

Nielsen Digital Panel 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.

Nielsen Digital Panel is only measuring 'static' content across websites & applications. Video content measurement is not a function of Nielsen Digital Panel (NDP). NDP 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, Nielsen Digital Panel 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 - DIGITAL CONTENT RATINGS

## DIGITAL CONTENT RATINGS



### 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