





DIGITAL LANDSCAPE & VIDEO VIEWING REPORT

August 2018

OVERVIEW

20,598,000

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)	17,528	2,316	3,673	3,204	3,073	2,571	2,691
	Profile %	85%	11%	18%	16%	15%	12%	13%
	Time per online Australian (hh:mm)	92:33	91:22	108:59	103:05	98:37	82:58	60:52
	Population Reach %	84%	93%	94%	89%	88%	83%	61%
Desktop	Online Australians (000s)	15,172	2,000	2,673	2,794	2,873	2,431	2,401
	Time per online Australian (hh:mm)	26:18	26:37	27:34	25:35	29:35	27:30	22:49
Smartphone	Online Australians (000s)	15,224	2,042	3,826	2,852	2,625	2,645	1,235
	Time per online Australian (hh:mm)	63:03	73:59	71:44	69:16	63:28	46:24	38:25
Tablet	Online Australians (000s)	*NA	*NA	*NA	*NA	*NA	*NA	*NA
	Time per online Australian (hh:mm)	*NA	*NA	*NA	*NA	*NA	*NA	*NA

*NOTE: Due to sample size limitations, demographic profiling of the tablet is Not Available

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

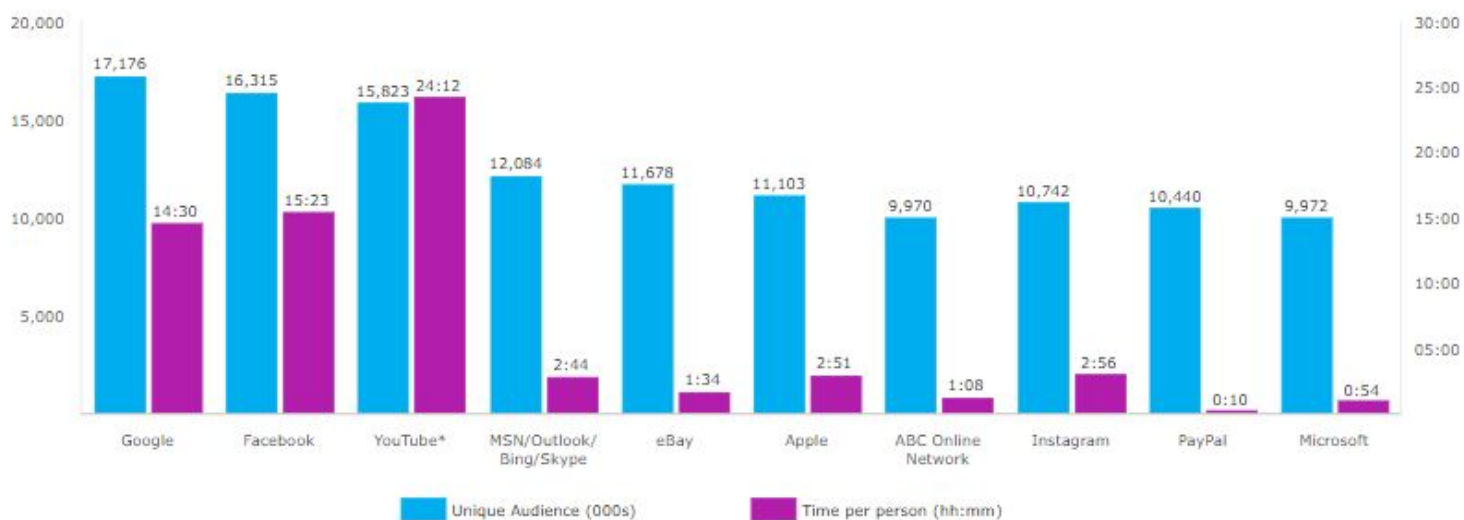
SURFING REPORT

Rank	Brands	People 2+ Unique Audience (000)	People 2+ Time per person	People 18+ Unique Audience (000)	People 18+ Time per person
	Total Audience	20,598	65:00:00	17,528	76:00:00
1	Google	19,481	12:50:55	17,176	14:30:26
2	Facebook	16,952	14:51:11	16,315	15:23:05
3	YouTube*	16,882	23:27:22	15,823	24:12:11
4	MSN/Outlook/Bing/Skype	13,068	2:32:34	12,084	2:43:45
5	eBay	12,111	1:31:10	11,678	1:34:06
6	Apple	11,280	2:48:45	11,103	2:51:22
7	ABC Online Network	10,807	1:07:23	9,970	1:08:07
8	Instagram	10,799	2:55:29	10,742	2:56:19
9	PayPal	10,587	0:09:56	10,440	0:10:02
10	Microsoft	10,277	0:53:58	9,972	0:54:18

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

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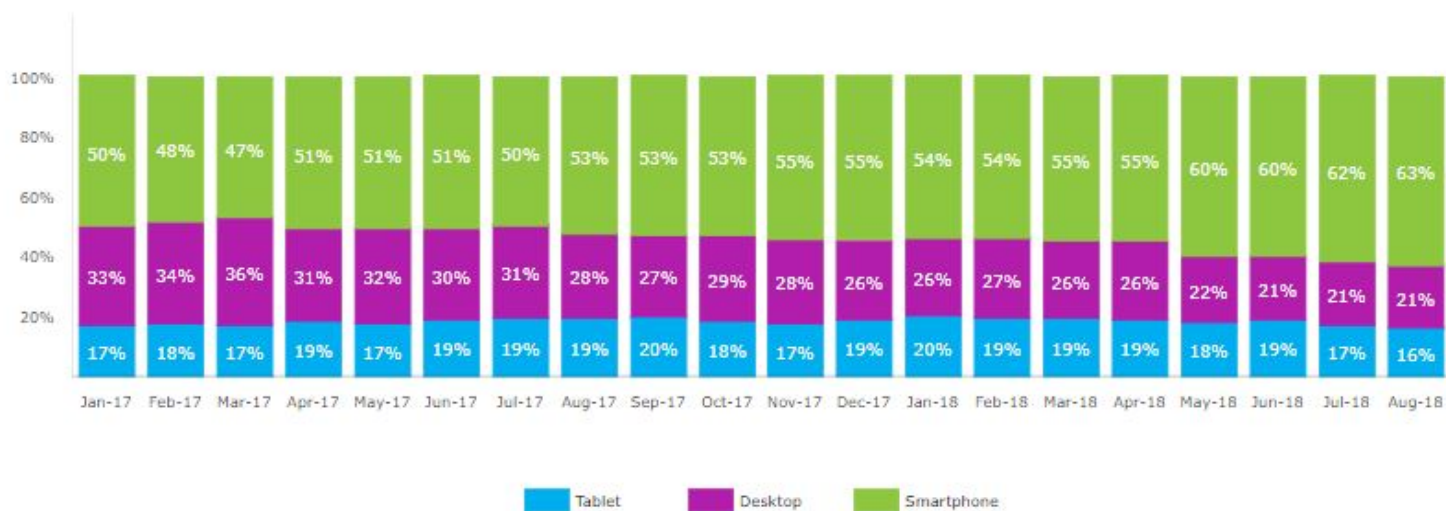
UNIQUE AUDIENCE VS DURATION



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

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TREND REPORT - TOTAL TIME BY DEVICE



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

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STREAMING VIDEO MARKET LINE

STREAMING VIDEO MARKET LINE - AUGUST 2018

Demo	Unique Audience	Population Reach (%) (ppl 18+)	Average Time Spent (HH:MM:SS)
Total 18+	16,105,545	84%	28:53:16
Total 18 - 24	2,154,314	92.5%	40:33:29
Total 25 - 34	3,487,094	93.9%	38:10:11
Total 35 - 44	2,921,038	89.2%	37:42:14
Total 45 - 54	2,820,627	87.6%	23:52:41
Total 55 - 64	2,370,453	82.7%	15:29:51
Total 65+	2,352,019	61.0%	12:59:27
Total Female 18+	8,290,664	84.5%	26:10:04
Female 18 - 24	1,058,723	92.9%	29:06:12
Female 25 - 34	1,749,951	93.9%	34:32:51
Female 35 - 44	1,458,962	88.8%	36:43:47
Female 45 - 54	1,530,762	93.1%	22:35:04
Female 55 - 64	1,276,269	87.0%	16:11:44
Female 65+	1,215,997	59.3%	13:51:26
Total Male 18+	7,814,881	82.7%	31:46:24
Male 18 - 24	2,154,314	92.5%	40:33:29
Male 25 - 34	3,487,094	93.9%	38:10:11
Male 35 - 44	2,921,038	89.2%	37:42:14
Male 45 - 54	2,820,627	87.6%	23:52:41
Male 55 - 64	2,370,453	82.7%	15:29:51
Male 65+	2,352,019	61.0%	12:59:27

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

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STREAMING REPORT – MONTHLY TOTAL

Brand	Unique Audience**	Population Base	Population Reach % (Ppl 18+)
Market Total	9,505,005	19,262,100	49.3%
YouTube	7,879,451	19,262,100	40.9%
Facebook	4,539,138	19,262,100	23.6%
news.com.au*	1,848,387	19,262,100	9.6%
Buzzfeed Network*	1,514,218	19,262,100	7.9%
Vimeo Websites	1,446,149	19,262,100	7.5%
Daily Mail Australia*	1,440,127	19,262,100	7.5%
Netflix	1,123,308	19,262,100	5.8%
nine.com.au*	900,868	19,262,100	4.7%
ABC Online Network	678,221	19,262,100	3.5%
Twitter	656,074	19,262,100	3.4%
MSN/Outlook/Bing/Skype	628,734	19,262,100	3.3%
Yahoo7	471,648	19,262,100	2.4%
TenPlay*	457,917	19,262,100	2.4%
Mamamia*	405,356	19,262,100	2.1%
9Now*	404,089	19,262,100	2.1%
SBS (Special Broadcasting Service)*	310,386	19,262,100	1.6%
Vice Media Network*	307,571	19,262,100	1.6%
taste.com.au*	299,049	19,262,100	1.6%
Telstra Media	243,560	19,262,100	1.3%
Herald Sun*	226,368	19,262,100	1.2%
The Daily Telegraph*	206,460	19,262,100	1.1%
SWM 7*	206,397	19,262,100	1.1%
CNET	181,317	19,262,100	0.9%
TwitchTV	177,365	19,262,100	0.9%
Whimn*	176,198	19,262,100	0.9%

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, August 2018, 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

Brand	Unique Audience**	Population Base	Population Reach % (Ppl 18+)
Market Total*	16,105,545	19,262,100	0.8%
news.com.au	3,041,790	19,262,100	15.8%
nine.com.au	2,045,281	19,262,100	10.6%
9Now	1,169,310	19,262,100	6.1%
Daily Mail Australia	750,932	19,262,100	3.9%
TenPlay	721,000	19,262,100	3.7%
taste.com.au	553,139	19,262,100	2.9%
Mamamia	428,070	19,262,100	2.2%
SBS (Special Broadcasting Service)	393,970	19,262,100	2.0%
Whimn	367,987	19,262,100	1.9%
The Daily Telegraph	354,445	19,262,100	1.8%
Herald Sun	346,049	19,262,100	1.8%
SWM 7	335,832	19,262,100	1.7%
couriermail.com.au	282,805	19,262,100	1.5%
AdelaideNow	261,934	19,262,100	1.4%
Vice Media Network	137,971	19,262,100	0.7%
NT News	58,191	19,262,100	0.3%
THE AUSTRALIAN	55,202	19,262,100	0.3%
Gold Coast Bulletin	51,937	19,262,100	0.3%
Lost At E Minor	38,389	19,262,100	0.2%
Techly	34,107	19,262,100	0.2%
themercury.com.au	31,113	19,262,100	0.2%
The Cairns Post	29,935	19,262,100	0.2%
Townsville Bulletin	21,275	19,262,100	0.1%
Buzzfeed Network	21,242	19,262,100	0.1%
Geelong Advertiser.com.au	19,669	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, August 2018, 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 unknow 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