





DIGITAL LANDSCAPE & VIDEO VIEWING REPORT

September 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)	91:15	89:33	112:17	97:24	94:02	81:16	63:03
	Population Reach %	83%	95%	93%	88%	85%	84%	58%
Desktop	Online Australians (000s)	15,246	1,968	2,689	2,873	2,903	2,455	2,357
	Time per online Australian (hh:mm)	24:10	22:38	25:17	21:42	27:11	25:32	22:02
Smartphone	Online Australians (000s)	15,014	2,063	3,849	2,792	2,532	2,561	1,217
	Time per online Australian (hh:mm)	63:52	77:16	70:29	71:24	64:09	45:50	40:17
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

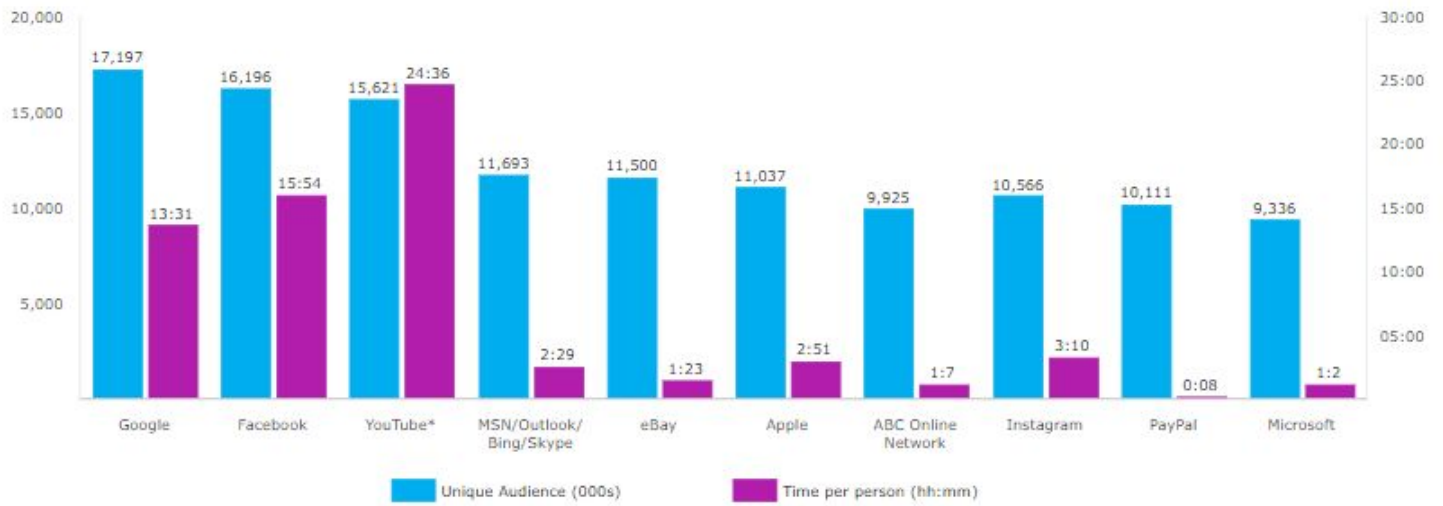
Source: NIELSEN DIGITAL PANEL (FORMERLY DIGITAL RATINGS MONTHLY) September 2018.

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	64:20:00	17,528	75:10:00
1	Google	19,337	12:04:08	17,197	13:31:20
2	Facebook	16,821	15:21:25	16,196	15:54:21
3	YouTube	16,601	23:57:06	15,621	24:35:58
4	MSN/Outlook/Bing/Skype	12,512	2:20:14	11,693	2:28:37
5	eBay	11,752	1:21:49	11,500	1:23:24
6	Apple	11,126	2:49:53	11,037	2:51:15
7	ABC Online Network	10,806	1:06:20	9,925	1:06:45
8	Instagram	10,607	3:09:38	10,566	3:10:09
9	PayPal	10,220	0:08:00	10,111	0:08:04
10	Microsoft	9,682	0:59:58	9,336	1:01:37

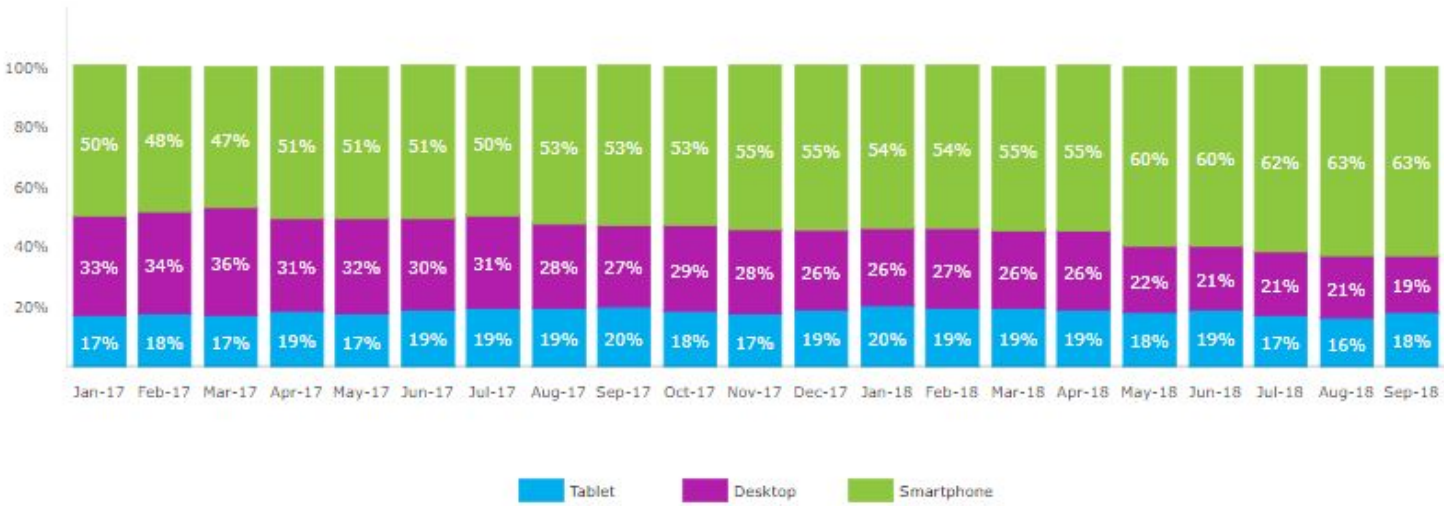
Source: Digital Content Ratings, Text, September 2018, People 2+, Monthly Total.

UNIQUE AUDIENCE VS DURATION



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

TREND REPORT - TOTAL TIME BY DEVICE



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

STREAMING VIDEO MARKET LINE

STREAMING VIDEO MARKET LINE - SEPTEMBER 2018

Demo	Unique Audience	Population Reach (%) (ppl 18+)	Average Time Spent (HH:MM:SS)
Total 18+	15,912,604	83%	30:38:15
Total 18 - 24	2,206,227	94.8%	45:32:09
Total 25 - 34	3,447,340	92.8%	46:54:51
Total 35 - 44	2,895,850	88.4%	30:27:25
Total 45 - 54	2,721,679	84.5%	23:10:07
Total 55 - 64	2,394,429	83.5%	19:09:19
Total 65+	2,247,079	58.2%	12:33:10
Total Female 18+	8,263,215	84.2%	29:56:28
Female 18 - 24	1,068,525	93.8%	36:30:20
Female 25 - 34	1,768,483	94.9%	42:32:29
Female 35 - 44	1,468,816	89.4%	40:04:17
Female 45 - 54	1,513,423	92.1%	24:11:37
Female 55 - 64	1,289,048	87.9%	18:39:48
Female 65+	1,154,920	56.3%	11:48:35
Total Male 18+	7,649,389	80.9%	31:23:22
Male 18 - 24	1,137,702	95.7%	54:01:03
Male 25 - 34	1,678,857	90.8%	51:31:13
Male 35 - 44	1,427,034	87.4%	20:33:39
Male 45 - 54	1,208,256	76.6%	21:53:05
Male 55 - 64	1,105,381	79.0%	19:43:45
Male 65+	1,092,159	60.5%	13:20:19

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

STREAMING REPORT – MONTHLY TOTAL

Brand	Unique Audience**	Population Base	Population Reach % (Ppl 18+)
Market Total	9,210,899	19,262,100	47.8%
YouTube	7,619,579	19,262,100	39.6%
Facebook	4,486,162	19,262,100	23.3%
news.com.au*	1,759,501	19,262,100	9.1%
Daily Mail Australia*	1,559,660	19,262,100	8.1%
Buzzfeed Network*	1,520,616	19,262,100	7.9%
Vimeo Websites	1,279,664	19,262,100	6.6%
Netflix	1,077,807	19,262,100	5.6%
nine.com.au*	897,338	19,262,100	4.7%
Twitter	636,678	19,262,100	3.3%
ABC Online Network	595,633	19,262,100	3.1%
MSN/Outlook/Bing/Skype	536,837	19,262,100	2.8%
Yahoo7	434,335	19,262,100	2.3%
TenPlay*	430,673	19,262,100	2.2%
9Now*	392,952	19,262,100	2.0%
smh.com.au	318,609	19,262,100	1.7%
Oath Sites	305,347	19,262,100	1.6%
SBS (Special Broadcasting Service)*	279,161	19,262,100	1.4%
Mamamia*	271,502	19,262,100	1.4%
taste.com.au*	249,741	19,262,100	1.3%
SWM 7*	244,155	19,262,100	1.3%
Herald Sun*	234,348	19,262,100	1.2%
Telstra Media	225,472	19,262,100	1.2%
TwitchTV	219,480	19,262,100	1.1%
Amazon	188,419	19,262,100	1.0%
The Age	185,687	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, September 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*	15,912,604	19,262,100	83.0%
news.com.au	3,050,008	19,262,100	15.8%
nine.com.au	2,279,593	19,262,100	11.8%
9Now	1,221,248	19,262,100	6.3%
Daily Mail Australia	836,140	19,262,100	4.3%
TenPlay	649,962	19,262,100	3.4%
taste.com.au	495,539	19,262,100	2.6%
Mamamia	408,965	19,262,100	2.1%
Herald Sun	376,930	19,262,100	2.0%
SWM 7	372,957	19,262,100	1.9%
Whimn	367,325	19,262,100	1.9%
SBS (Special Broadcasting Service)	361,013	19,262,100	1.9%
The Daily Telegraph	324,003	19,262,100	1.7%
couriermail.com.au	317,027	19,262,100	1.6%
AdelaideNow	203,042	19,262,100	1.1%
Lost At E Minor	93,659	19,262,100	0.5%
THE AUSTRALIAN	66,921	19,262,100	0.3%
NT News	62,960	19,262,100	0.3%
Techly	53,909	19,262,100	0.3%
Gold Coast Bulletin	53,521	19,262,100	0.3%
The Cairns Post	35,997	19,262,100	0.2%
Buzzfeed Network	27,368	19,262,100	0.1%
Townsville Bulletin	23,123	19,262,100	0.1%
Geelong Advertiser.com.au	18,459	19,262,100	0.1%
Lost At E Minor.TV	8,323	19,262,100	0.0%
weekiytimesnow	7,273	19,262,100	0.0%

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, September 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 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