




DIGITAL LANDSCAPE & VIDEO VIEWING REPORT

November 2018

OVERVIEW

20,658,000

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+
	Online Australians (000s)	17,571	2,315	3,676	3,202	3,082	2,578	2,717
	Profile %	85%	11%	18%	16%	15%	12%	13%
	Time per online Australian (hh:mm)	94:37	104:54	109:57	95:50	100:14	56:41	64:51
	Population Reach %	84%	96%	95%	89%	87%	82%	57%
	Online Australians (000s)	15,193	1,838	2,914	2,846	2,820	2,425	2,350
	Time per online Australian (hh:mm)	24:38	22:59	22:48	22:28	28:32	27:05	23:34
	Online Australians (000s)	15,251	2,288	3,718	2,890	2,679	2,473	1,202
	Time per online Australian (hh:mm)	66:19	81:19	73:49	69:03	62:39	51:26	46:50
	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

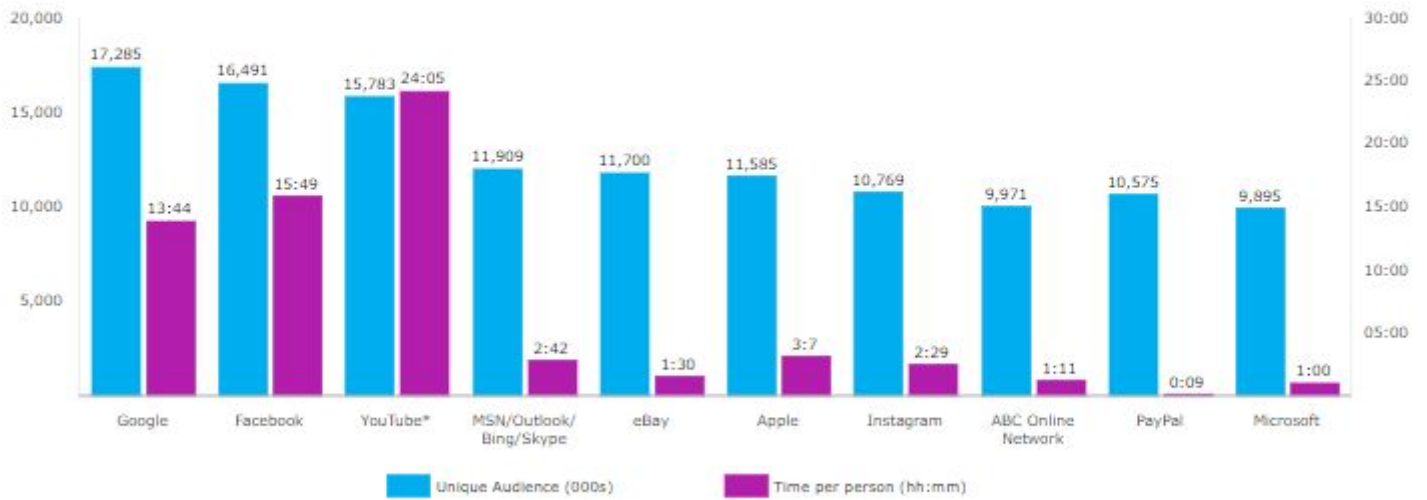
Source: NIELSEN DIGITAL PANEL (FORMERLY DIGITAL RATINGS MONTHLY) November 2018.

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	20,658	65:15:00	17,571	76:14:00
1	Google	19,505	12:13:26	17,285	13:43:44
2	Facebook	17,092	15:17:21	16,491	15:49:27
3	YouTube	16,839	23:12:07	15,783	24:05:26
4	MSN/Outlook/Bing/Skype	12,778	2:33:18	11,909	2:42:22
5	eBay	11,983	1:27:54	11,700	1:30:29
6	Apple	11,654	3:05:33	11,585	3:06:35
7	Instagram	10,846	2:28:04	10,769	2:29:04
8	ABC Online Network	10,845	1:09:33	9,971	1:10:35
9	PayPal	10,729	0:09:14	10,575	0:09:20
10	Microsoft	10,408	0:58:56	9,895	1:00:02

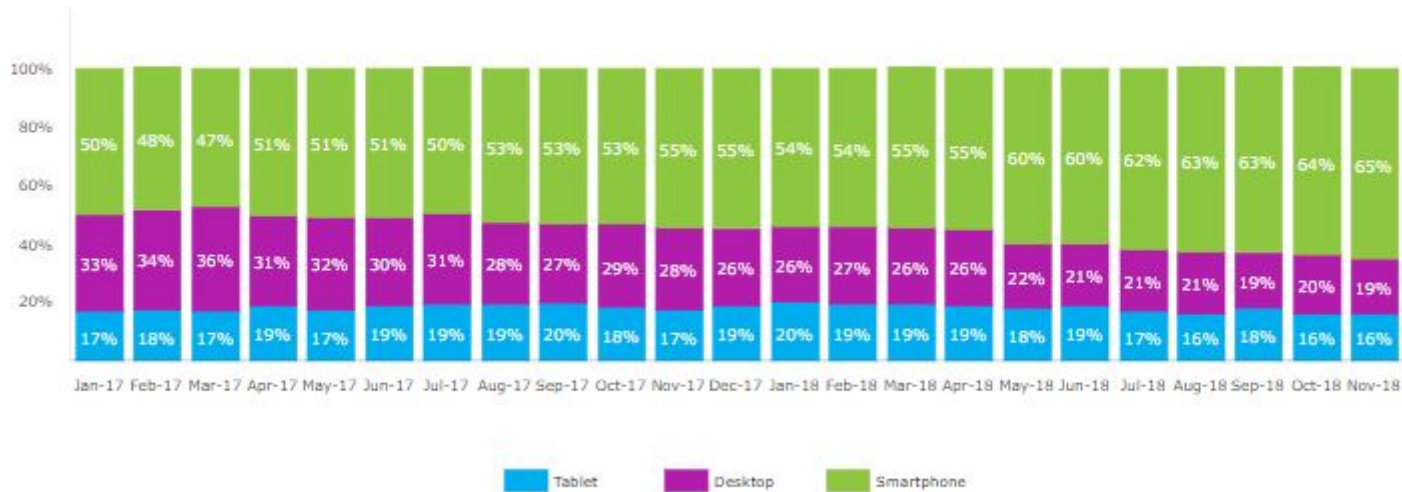
Source: Digital Content Ratings, Text, November 2018, People 2+, Monthly Total.

UNIQUE AUDIENCE VS DURATION



Source: Digital Content Ratings, Text, November 2018, People 18+, Monthly Total. *YouTube duration reporting is sourced from DCR Monthly Total

TREND REPORT - TOTAL TIME BY DEVICE



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

STREAMING VIDEO MARKET LINE

STREAMING VIDEO MARKET LINE - NOVEMBER 2018

Demo	Unique Audience	Population Reach (%) (ppl 18+)	Average Time Spent (HH:MM:SS)
Total 18+	16,090,460	84%	29:36:01
Total 18 - 24	2,246,278	96.5%	49:17:38
Total 25 - 34	3,527,953	95.0%	46:07:14
Total 35 - 44	2,931,915	89.5%	27:16:59
Total 45 - 54	2,810,327	87.3%	21:45:11
Total 55 - 64	2,364,346	82.5%	15:18:05
Total 65+	2,209,641	57.3%	11:33:30
Total Female 18+	8,205,316	83.6%	26:54:08
Female 18 - 24	1,091,250	95.7%	35:00:21
Female 25 - 34	1,782,939	95.6%	40:28:11
Female 35 - 44	1,509,019	91.9%	28:56:04
Female 45 - 54	1,474,519	89.7%	25:33:37
Female 55 - 64	1,231,823	84.0%	13:00:50
Female 65+	1,115,766	54.4%	11:39:14
Total Male 18+	7,885,144	83.4%	32:24:28
Male 18 - 24	1,155,028	97.2%	62:47:35
Male 25 - 34	1,745,014	94.4%	51:53:39
Male 35 - 44	1,422,896	87.1%	25:31:55
Male 45 - 54	1,335,808	84.7%	17:33:01
Male 55 - 64	1,132,523	81.0%	17:47:22
Male 65+	1,093,875	60.6%	11:27:39

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

STREAMING REPORT – MONTHLY TOTAL

Brand	Unique Audience**	Population Base	Population Reach % (Ppl 18+)
Market Total	9,255,634	19,262,100	48.1%
YouTube	7,644,551	19,262,100	39.7%
Facebook	4,338,373	19,262,100	22.5%
Daily Mail Australia*	2,078,674	19,262,100	10.8%
news.com.au*	1,731,110	19,262,100	9.0%
Vimeo Websites	1,499,758	19,262,100	7.8%
Buzzfeed Network*	1,370,890	19,262,100	7.1%
Netflix	1,189,025	19,262,100	6.2%
nine.com.au*	920,159	19,262,100	4.8%
Twitter	712,442	19,262,100	3.7%
Business Insider*	610,416	19,262,100	3.2%
MSN/Outlook/Bing/Skype	550,927	19,262,100	2.9%
Vice Media Network*	548,067	19,262,100	2.8%
smh.com.au	513,452	19,262,100	2.7%
ABC Online Network	473,341	19,262,100	2.5%
Yahoo7	399,906	19,262,100	2.1%
SWM 7+	354,115	19,262,100	1.8%
Herald Sun*	309,267	19,262,100	1.6%
The Age	297,527	19,262,100	1.5%
taste.com.au*	278,174	19,262,100	1.4%
9Now*	270,956	19,262,100	1.4%
SBS (Special Broadcasting Service)*	254,260	19,262,100	1.3%
Bunnings Trade	199,281	19,262,100	1.0%
TwitchTV	182,904	19,262,100	0.9%
CNET	182,520	19,262,100	0.9%
Amazon	175,724	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, November 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*	16,090,460	19,262,100	84.0%
news.com.au	2,626,880	19,262,100	13.6%
nine.com.au	2,281,727	19,262,100	11.8%
9Now	799,233	19,262,100	4.1%
Daily Mail Australia	782,888	19,262,100	4.1%
SWM 7	533,603	19,262,100	2.8%
The Roar	441,588	19,262,100	2.3%
Herald Sun	430,171	19,262,100	2.2%
TenPlay	426,904	19,262,100	2.2%
taste.com.au	420,981	19,262,100	2.2%
SBS (Special Broadcasting Service)	333,223	19,262,100	1.7%
Whimn	288,376	19,262,100	1.5%
The Daily Telegraph	282,587	19,262,100	1.5%
couriermail.com.au	275,749	19,262,100	1.4%
AdelaideNow	224,543	19,262,100	1.2%
Vice Media Network	80,935	19,262,100	0.4%
THE AUSTRALIAN	72,596	19,262,100	0.4%
Gold Coast Bulletin	68,862	19,262,100	0.4%
NT News	63,608	19,262,100	0.3%
The Cairns Post	48,859	19,262,100	0.3%
Lost At E Minor	44,539	19,262,100	0.2%
themercury.com.au	42,062	19,262,100	0.2%
Townsville Bulletin	41,158	19,262,100	0.2%
weekiytimesnow	31,997	19,262,100	0.2%
Geelong Advertiser.com.au	22,681	19,262,100	0.1%
Techly	15,678	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, November 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