

DIGITAL LANDSCAPE & VIDEO VIEWING REPORT

December 2018

OVERVIEW

20,717,000

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)	17,650	2,318	3,674	3,203	3,079	2,591	2,786
	Profile %	85%	11%	18%	15%	15%	13%	13%
	Time per online Australian (hh:mm)	94:23	106:46	109:29	95:37	92:04	95:42	64:08
	Population Reach %	84%	92%	93%	90%	88%	85%	59%
	Online Australians (000s)	15,265	1,811	2,743	2,884	2,854	2,520	2,453
	Time per online Australian (hh:mm)	21:41	19:34	18:16	21:16	23:31	24:32	22:31
	Online Australians (000s)	15,376	2,261	3,737	2,687	3,047	2,271	1,373
	Time per online Australian (hh:mm)	66:41	89:39	71:53	73:08	56:21	57:42	39:56
	Online Australians (000s)	*NA	*NA	*NA	*NA	*NA	*NA	*NA
	Time per online Australian (hh:mm)	*NA	*NA	*NA	*NA	*NA	*NA	*NA

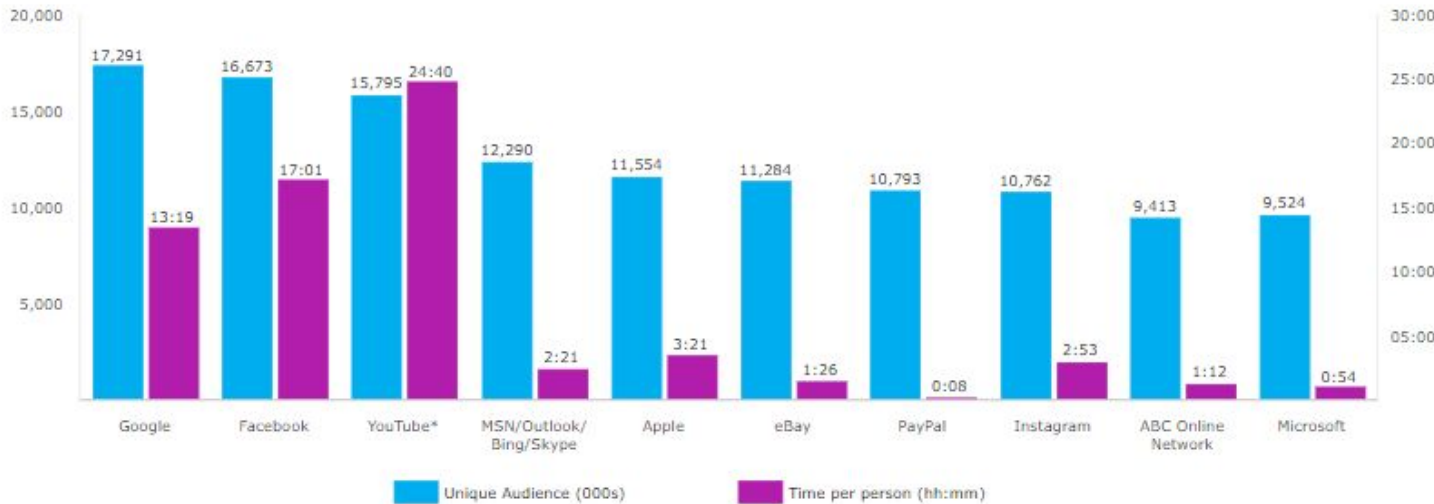
Source: NIELSEN DIGITAL PANEL (FORMERLY DIGITAL RATINGS MONTHLY) December 2018.

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	20,717	66:45:00	17,650	77:55:00
1	Google	19,320	11:57:07	17,291	13:18:41
2	Facebook	17,297	16:25:31	16,673	17:01:21
3	YouTube	16,951	23:41:19	15,795	24:39:31
4	MSN/Outlook/Bing/Skype	13,195	2:12:27	12,290	2:20:34
5	Apple	11,636	3:19:29	11,554	3:20:47
6	eBay	11,553	1:23:57	11,284	1:25:50
7	PayPal	10,921	0:07:57	10,793	0:08:01
8	Instagram	10,831	2:51:31	10,762	2:52:34
9	ABC Online Network	10,259	1:10:45	9,413	1:11:31
10	Microsoft	9,894	0:53:08	9,524	0:54:16

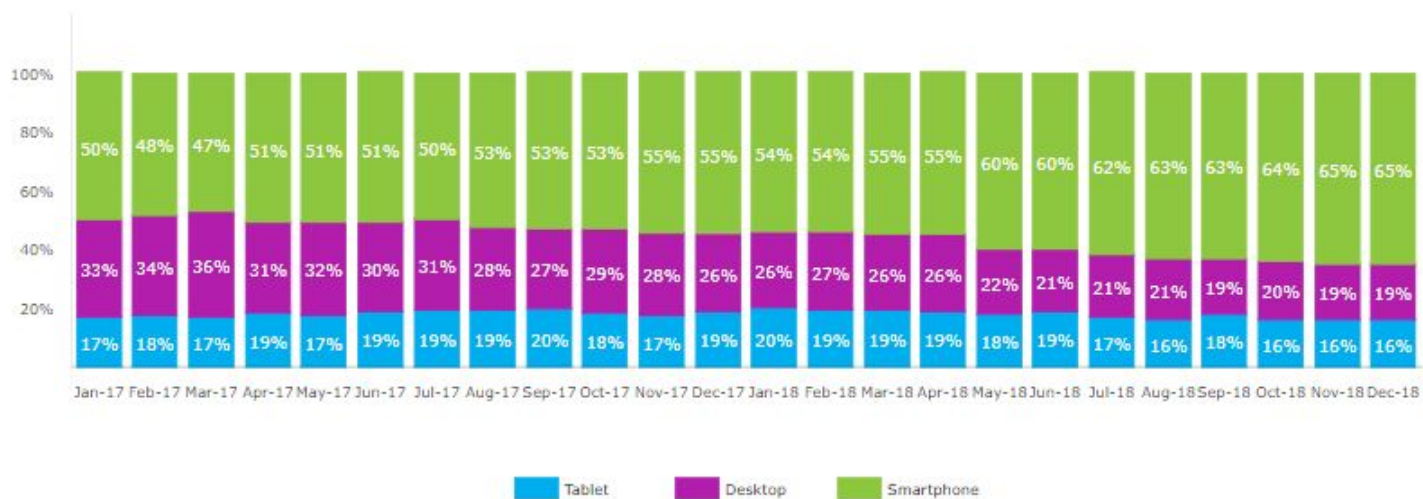
Source: Digital Content Ratings, Text, December 2018, People 2+, Monthly Total.

UNIQUE AUDIENCE VS DURATION



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

STREAMING VIDEO MARKET LINE

STREAMING VIDEO MARKET LINE - DECEMBER 2018

Demo	Unique Audience	Population Reach (%) (ppl 18+)	Average Time Spent (HH:MM:SS)
Total 18+	16,108,862	84%	31:08:29
Total 18 - 24	2,151,074	92.4%	49:05:46
Total 25 - 34	3,469,599	93.4%	38:55:26
Total 35 - 44	2,940,029	89.7%	38:31:35
Total 45 - 54	2,832,621	87.9%	24:40:31
Total 55 - 64	2,441,631	85.2%	18:50:40
Total 65+	2,273,908	58.9%	13:59:32
Total Female 18+	8,042,109	82.0%	29:42:24
Female 18 - 24	1,074,863	94.3%	49:17:42
Female 25 - 34	1,756,111	94.2%	33:21:19
Female 35 - 44	1,556,589	94.8%	31:59:23
Female 45 - 54	1,413,463	86.0%	28:19:20
Female 55 - 64	1,249,656	85.2%	19:54:57
Female 65+	991,427	48.3%	12:44:14
Total Male 18+	8,066,753	85.3%	32:34:18
Male 18 - 24	1,076,211	90.5%	48:53:50
Male 25 - 34	1,713,488	92.7%	44:37:53
Male 35 - 44	1,383,440	84.7%	45:52:52
Male 45 - 54	1,419,158	90.0%	21:02:34
Male 55 - 64	1,191,975	85.2%	17:43:17
Male 65+	1,282,481	71.0%	14:57:45

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

STREAMING REPORT – MONTHLY TOTAL

Brand	Unique Audience**	Population Base	Population Reach % (Ppl 18+)
Market Total	9,242,025	19,262,100	48.0%
YouTube	7,907,984	19,262,100	41.1%
Facebook	4,388,987	19,262,100	22.8%
Daily Mail Australia*	1,875,914	19,262,100	9.7%
news.com.au*	1,476,406	19,262,100	7.7%
Buzzfeed Network*	1,350,483	19,262,100	7.0%
Vimeo Websites	1,348,957	19,262,100	7.0%
Netflix	1,125,459	19,262,100	5.8%
nine.com.au*	761,574	19,262,100	4.0%
Business Insider*	588,770	19,262,100	3.1%
Vice Media Network*	549,704	19,262,100	2.9%
Twitter	530,443	19,262,100	2.8%
smh.com.au	468,168	19,262,100	2.4%
MSN/Outlook/Bing/Skype	433,951	19,262,100	2.3%
Yahoo!	374,572	19,262,100	1.9%
ABC Online Network	356,647	19,262,100	1.9%
taste.com.au*	349,331	19,262,100	1.8%
Dailymotion	290,823	19,262,100	1.5%
SBS (Special Broadcasting Service)*	265,074	19,262,100	1.4%
The Age	260,758	19,262,100	1.4%
9Now*	213,685	19,262,100	1.1%
SWM 7*	207,220	19,262,100	1.1%
Whimn*	207,209	19,262,100	1.1%
IMDb - Internet Movie Database	199,358	19,262,100	1.0%
Amazon	197,337	19,262,100	1.0%
Bunnings Trade	185,240	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, December 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*	16,108,862	19,262,100	84.0%
news.com.au	2,397,926	19,262,100	12.4%
nine.com.au	2,186,695	19,262,100	11.4%
Daily Mail Australia	778,844	19,262,100	4.0%
9Now	706,629	19,262,100	3.7%
taste.com.au	596,151	19,262,100	3.1%
Whimn	395,728	19,262,100	2.1%
SBS (Special Broadcasting Service)	355,797	19,262,100	1.8%
SWM 7	328,667	19,262,100	1.7%
The Roar	316,301	19,262,100	1.6%
couriermail.com.au	268,230	19,262,100	1.4%
The Daily Telegraph	264,929	19,262,100	1.4%
Network 10	231,699	19,262,100	1.2%
AdelaideNow	214,930	19,262,100	1.1%
Gold Coast Bulletin	64,258	19,262,100	0.3%
NT News	63,529	19,262,100	0.3%
THE AUSTRALIAN	62,451	19,262,100	0.3%
The Cairns Post	53,031	19,262,100	0.3%
Townsville Bulletin	50,233	19,262,100	0.3%
weekklytimesnow	49,904	19,262,100	0.3%
themercury.com.au	43,582	19,262,100	0.2%
Lost At E Minor	26,239	19,262,100	0.1%
Delicious.	22,370	19,262,100	0.1%
Buzzfeed Network	21,833	19,262,100	0.1%
Geelong Advertiser.com.au	17,995	19,262,100	0.1%
Techly	16,231	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, December 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