

# DIGITAL LANDSCAPE & VIDEO VIEWING REPORT

September 2019

## OVERVIEW

21,006,000

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)	18,052	2,340	3,753	3,265	3,125	2,667	2,902
	Profile %	74%	10%	15%	13%	13%	11%	12%
	Time per online Australian (hh:mm)	132:23	142:51	146:05	162:41	137:02	105:18	92:02
	Population Reach %	92%	99%	100%	99%	97%	91%	73%
	Online Australians (000s)	15,498	2,037	3,144	2,969	2,703	2,315	2,329
	Time per online Australian (hh:mm)	25:22	21:56	23:16	26:57	30:13	24:48	24:05
	Online Australians (000s)	16,259	2,148	3,865	3,248	2,889	2,755	1,354
	Time per online Australian (hh:mm)	101:09	124:25	116:43	104:49	93:49	75:39	78:29
	Online Australians (000s)	7,369	424	1,257	1,326	1,665	1,337	1,360
	Time per online Australian (hh:mm)	49:49	81:58	40:46	50:03	49:13	50:45	47:42

Source: NIELSEN DIGITAL PANEL (FORMERLY DIGITAL RATINGS MONTHLY) September 2019.

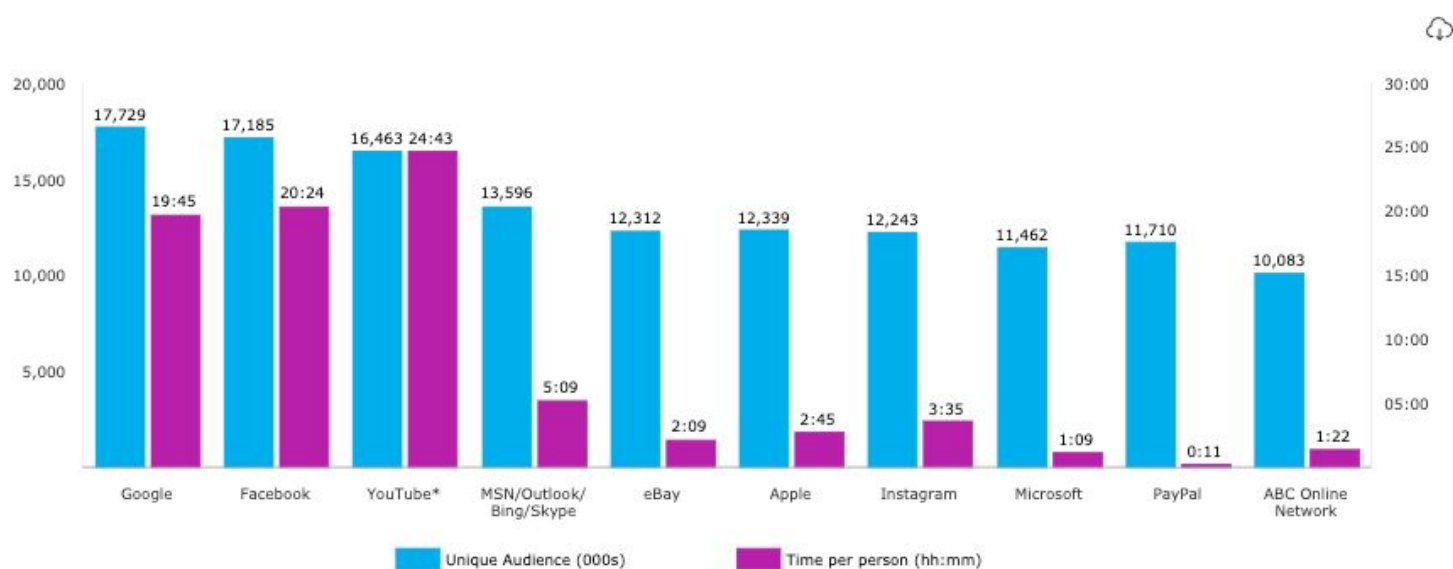
# SURFING REPORT



Rank	Brands	People 2+ Unique Audience (000)	People 2+ Time per person	People 18+ Unique Audience (000)	People 18+ Time per person
	Total Audience	21,006,000	96:00:45	18,052,000	111:16:36
1	Google	19,690,376	17:50:46	17,729,326	19:44:42
2	Facebook	17,644,891	19:52:10	17,184,611	20:23:31
3	YouTube*	17,367,242	24:03:15	16,463,308	24:42:38
4	MSN/Outlook/Bing/Skype	14,429,113	4:51:58	13,596,057	5:09:06
5	eBay	12,546,142	2:07:09	12,312,232	2:09:23
6	Apple	12,444,839	2:43:19	12,339,482	2:44:41
7	Instagram	12,305,553	3:33:45	12,242,689	3:34:44
8	Microsoft	11,835,765	1:09:30	11,461,624	1:09:30
9	PayPal	11,771,409	0:10:38	11,709,921	0:10:39
10	ABC Online Network	10,936,290	1:21:05	10,083,107	1:22:04

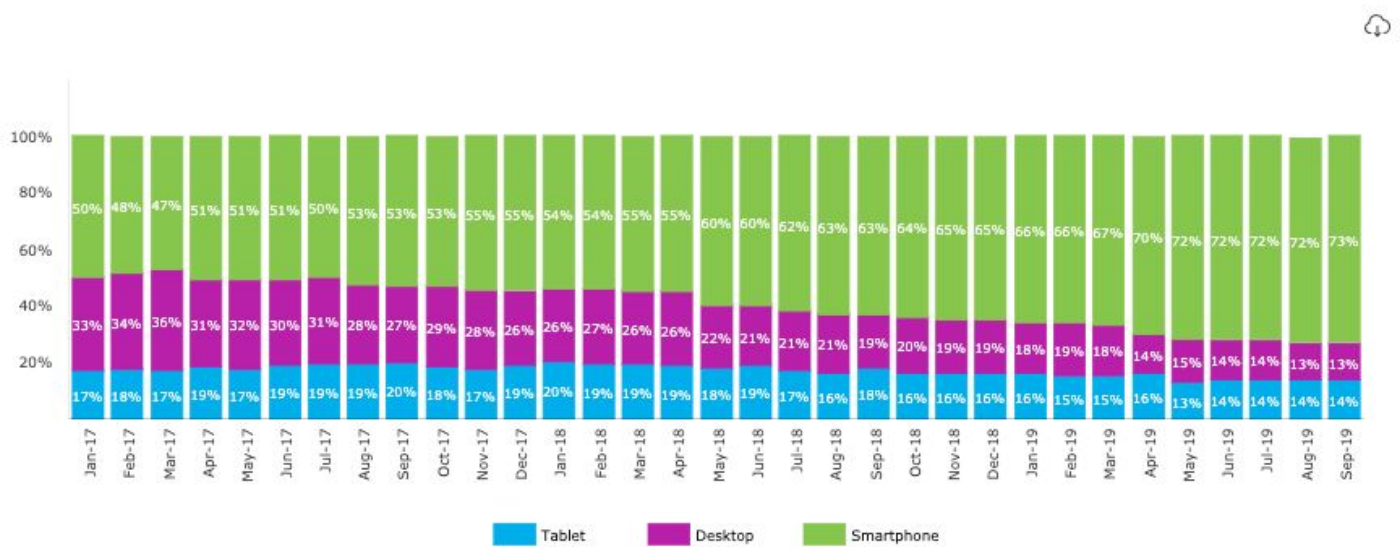
Source: Digital Content Ratings, Text, September 2019, People 2+, Monthly Total.\*YouTube reporting is sourced from DCR Monthly Total Video

## UNIQUE AUDIENCE VS DURATION



Source: Digital Content Ratings, Text, September 2019, People 2+, Monthly Total. \*YouTube reporting is sourced from DCR Monthly Total Video

## TREND REPORT - TOTAL TIME BY DEVICE



Source: Digital Content Ratings, Text, September 2019, People 2+, Monthly Total.



# STREAMING VIDEO MARKET LINE

## STREAMING VIDEO MARKET LINE - SEPTEMBER 2019



Demo	Unique Audience	Population Reach (%) (ppl 18+)	Average Time Spent (HH:MM:SS)
Total 18+	16,607,010	85%	28:11:19
Total 18 - 24	2,252,362	95.7%	51:36:59
Total 25 - 34	3,619,761	96.2%	33:59:20
Total 35 - 44	3,076,056	92.9%	31:39:16
Total 45 - 54	2,877,590	88.9%	24:58:21
Total 55 - 64	2,466,723	84.6%	12:06:03
Total 65+	2,314,518	58.4%	11:03:52
Total Female 18+	8,457,624	85.0%	20:16:49
Female 18 - 24	1,083,173	94.2%	28:45:50
Female 25 - 34	1,817,903	96.1%	30:59:19
Female 35 - 44	1,544,587	93.0%	27:33:05
Female 45 - 54	1,496,062	90.6%	21:58:23
Female 55 - 64	1,239,543	83.1%	13:23:54
Female 65+	1,266,358	60.2%	9:41:37
Total Male 18+	8,149,386	85.0%	35:53:12
Male 18 - 24	1,147,303	95.3%	75:25:31
Male 25 - 34	1,793,538	95.9%	43:07:20
Male 35 - 44	1,513,832	91.7%	35:38:45
Male 45 - 54	1,404,292	88.6%	32:52:32
Male 55 - 64	1,134,007	79.7%	13:38:46
Male 65+	1,156,414	62.3%	11:13:12

Source: Digital Content Ratings, Video, September 2019, People 18+, Monthly Total

# STREAMING REPORT – MONTHLY TOTAL

Brand	Unique Audience**	Population Base	Population Reach % (Ppl 18+)
Market Total	9,160,184	19,538,610	46.9%
YouTube	8,207,109	19,538,610	42.0%
Facebook	3,788,294	19,538,610	19.4%
news.com.au*	1,541,159	19,538,610	7.9%
Vimeo Websites	980,335	19,538,610	5.0%
Daily Mail Australia*	874,495	19,538,610	4.5%
SWM 7*	868,955	19,538,610	4.4%
Netflix	839,435	19,538,610	4.3%
nine.com.au*	773,311	19,538,610	4.0%
Twitter	604,144	19,538,610	3.1%
ABC Online Network	576,152	19,538,610	2.9%
Yahoo!	531,717	19,538,610	2.7%
9Now*	439,397	19,538,610	2.2%
Network 10*	357,755	19,538,610	1.8%
SBS (Special Broadcasting Service)*	279,074	19,538,610	1.4%
taste.com.au*	278,206	19,538,610	1.4%
smh.com.au	264,821	19,538,610	1.4%
Whimn*	232,990	19,538,610	1.2%
IMDb - Internet Movie Database	220,099	19,538,610	1.1%
Dailymotion	217,508	19,538,610	1.1%
Triple M Network*	215,761	19,538,610	1.1%
MSN/Outlook/Bing/Skype	204,674	19,538,610	1.0%
Vice Media Network*	204,586	19,538,610	1.0%
Amazon	180,476	19,538,610	0.9%
Foxtel	159,921	19,538,610	0.8%
Pedestrian Group Network*	158,126	19,538,610	0.8%

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 2019, 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 *	16,607,010	19,538,610	85.0%
SWM 7	2,723,516	19,538,610	13.9%
news.com.au	2,488,328	19,538,610	12.7%
nine.com.au	2,466,522	19,538,610	12.6%
9Now	1,326,861	19,538,610	6.8%
Daily Mail Australia	955,145	19,538,610	4.9%
Network 10	779,663	19,538,610	4.0%
perthnow	499,522	19,538,610	2.6%
The Roar	459,304	19,538,610	2.4%
The Daily Telegraph	386,095	19,538,610	2.0%
SBS (Special Broadcasting Service)	379,627	19,538,610	1.9%
taste.com.au	366,809	19,538,610	1.9%
Whimn	318,839	19,538,610	1.6%
Herald Sun	311,313	19,538,610	1.6%
couriermail.com.au	306,073	19,538,610	1.6%
AdelaideNow	276,296	19,538,610	1.4%
The West Australian	247,162	19,538,610	1.3%
Triple M Network	85,725	19,538,610	0.4%
Vice Media Network	82,427	19,538,610	0.4%
THE AUSTRALIAN	67,047	19,538,610	0.3%
NT News	66,813	19,538,610	0.3%
Gold Coast Bulletin	66,396	19,538,610	0.3%
weeklytimesnow	47,245	19,538,610	0.2%
Hit Network	43,720	19,538,610	0.2%
Geelong Advertiser.com.au	37,264	19,538,610	0.2%
The Cairns Post	37,105	19,538,610	0.2%

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 2019, 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