DIGITAL LANDSCAPE & VIDEO VIEWING REPORT

November 2019

OVERVIEW

21,071,000
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)	18,048	2,337	3,756	3,265	3,134	2,679	2,877
	Profile %	74%	10%	15%	13%	13%	11%	12%
	Time per online Australian (hh:mm)	126:02	101:30	137:29	166:29	138:16	111:55	84:54
	Population Reach %	92%	99%	100%	99%	97%	92%	73%
Desktop	Online Australians (000s)	15,476	2,031	3,218	2,944	2,741	2,245	2,298
	Time per online Australian (hh:mm)	26:17	19:31	24:41	30:40	29:11	26:31	25:12
Smartphone	Online Australians (000s)	16,293	2,232	3,703	3,227	2,985	2,729	1,416
	Time per online Australian (hh:mm)	91:25	77:32	104:55	107:49	89:00	76:07	75:10
Tablet	Online Australians (000s)	7,459	429	1,186	1,343	1,689	1,552	1,259
	Time per online Australian (hh:mm)	52:12	91:56	52:17	51:27	53:13	42:01	50:32

Source: NIELSEN DIGITAL PANEL (FORMERLY DIGITAL RATINGS MONTHLY) November 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	21,071	94:14:52	18,048	109:35:31
1	Google	19,648	17:56:06	17,658	19:53:32
2	Youtube	17,464	23:44:21	16,407	24:44:09
3	Facebook	17,428	20:25:36	16,987	20:56:40
4	MSN/Outlook/Bing/Skype	13,370	5:31:23	12,805	5:45:39
5	eBay	12,704	2:00:23	12,447	2:02:30
6	Apple	12,686	2:31:10	12,614	2:32:01
7	Instagram	12,428	3:51:43	12,367	3:52:40
8	PayPal	12,347	0:11:10	12,276	0:11:13
9	ABC Online Network	11,583	1:15:26	10,726	1:16:09
10	Microsoft	11,481	1:13:34	11,156	1:14:29

Source: Digital Content Ratings, Text, November 2019, People 2+, Monthly Total.*YouTube reporting is sourced from DCR Monthly Total Video
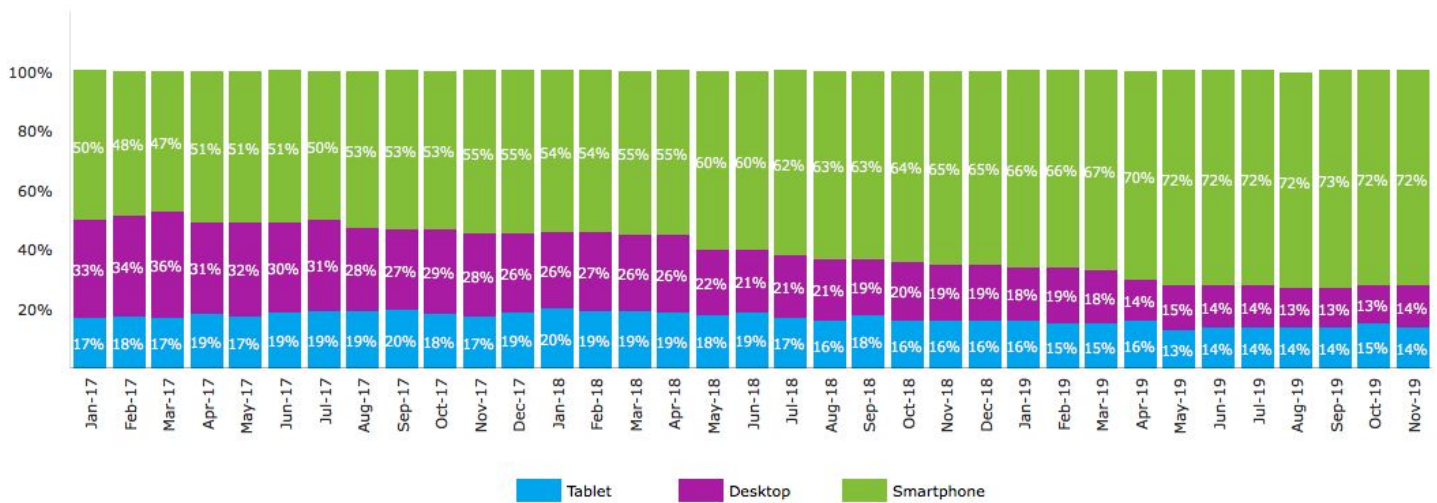
UNIQUE AUDIENCE VS DURATION
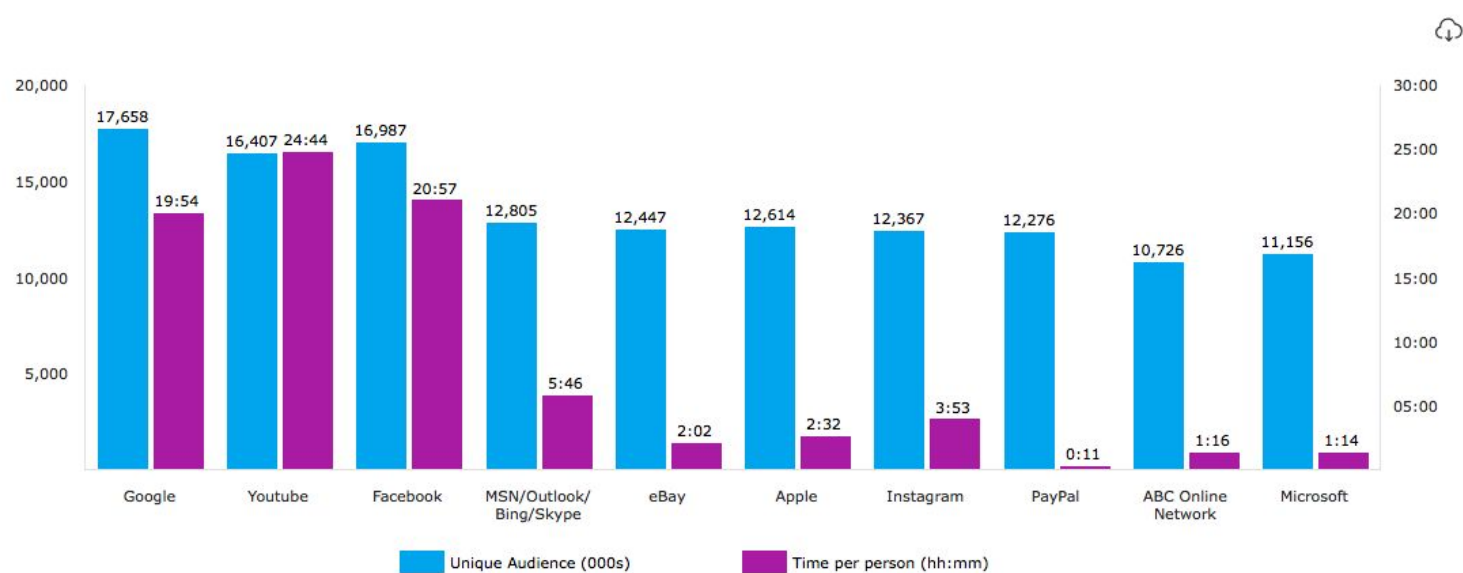
Source: Digital Content Ratings, Text, November 2019, People 2+, Monthly Total. *YouTube reporting is sourced from DCR Monthly Total Video

TREND REPORT - TOTAL TIME BY DEVICE

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

STREAMING VIDEO MARKET LINE - NOVEMBER 2019

Demo	Unique Audience	Population Reach (%) (ppl 18+)	Average Time Spent (HH:MM:SS)
Total 18+	16,809,232	86%	35:10:52
Total 18 - 24	2,199,409	93.4%	62:05:31
Total 25 - 34	3,591,953	95.5%	46:02:52
Total 35 - 44	3,129,278	94.5%	35:54:40
Total 45 - 54	2,970,938	91.8%	32:01:23
Total 55 - 64	2,605,351	89.4%	18:42:36
Total 65+	2,312,303	58.4%	14:19:58
Total Female 18+	8,556,961	86.0%	29:56:18
Female 18 - 24	1,111,290	96.6%	47:36:02
Female 25 - 34	1,817,541	96.1%	42:18:20
Female 35 - 44	1,586,043	95.5%	30:05:02
Female 45 - 54	1,543,461	93.5%	26:38:13
Female 55 - 64	1,351,118	90.6%	17:33:29
Female 65+	1,147,508	54.5%	12:03:42
Total Male 18+	8,252,271	86.1%	40:37:03
Male 18 - 24	1,088,119	90.4%	76:53:30
Male 25 - 34	1,774,412	94.9%	49:52:51
Male 35 - 44	1,543,235	93.5%	41:53:59
Male 45 - 54	1,427,477	90.1%	37:50:49
Male 55 - 64	1,254,233	88.1%	19:57:04
Male 65+	1,164,795	62.7%	16:34:13

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

STREAMING REPORT – MONTHLY TOTAL

Brand	Unique Audience**	Population Base	Population Reach % (Ppl 18+)
Market Total	10,750,193	19,538,610	55.0%
YouTube	8,298,714	19,538,610	42.5%
Facebook	6,324,151	19,538,610	32.4%
news.com.au*	2,200,971	19,538,610	11.3%
Netflix	1,570,974	19,538,610	8.0%
Daily Mail Australia*	1,401,027	19,538,610	7.2%
ABC Online Network	1,187,663	19,538,610	6.1%
Twitter	828,078	19,538,610	4.2%
SBS (Special Broadcasting Service)*	818,709	19,538,610	4.2%
Reddit.com	816,158	19,538,610	4.2%
Yahoo!	797,916	19,538,610	4.1%
nine.com.au*	786,328	19,538,610	4.0%
Pinterest	715,520	19,538,610	3.7%
Vimeo Websites	695,748	19,538,610	3.6%
SWM 7*	637,940	19,538,610	3.3%
Instagram	592,143	19,538,610	3.0%
9Now*	569,578	19,538,610	2.9%
smh.com.au	490,812	19,538,610	2.5%
MSN/Outlook/Bing/Skype	458,994	19,538,610	2.3%
Stan Stan.com.au	411,483	19,538,610	2.1%
Amazon	393,900	19,538,610	2.0%
taste.com.au*	391,274	19,538,610	2.0%
Forbes.com	377,376	19,538,610	1.9%
Tom's	361,425	19,538,610	1.8%
Network 10*	360,360	19,538,610	1.8%
Whimn*	357,884	19,538,610	1.8%

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, November 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*	16,809,232	19,538,610	86.0%
news.com.au	3,349,663	19,538,610	17.1%
SWM 7	3,154,979	19,538,610	16.1%
nine.com.au	2,488,268	19,538,610	12.7%
9Now	1,423,881	19,538,610	7.3%
Network 10	923,301	19,538,610	4.7%
Whimn	540,917	19,538,610	2.8%
taste.com.au	477,083	19,538,610	2.4%
couriermail.com.au	461,829	19,538,610	2.4%
perthnow	435,060	19,538,610	2.2%
The Daily Telegraph	374,735	19,538,610	1.9%
Herald Sun	373,825	19,538,610	1.9%
The Roar	371,251	19,538,610	1.9%
SBS (Special Broadcasting Service)	341,195	19,538,610	1.7%
AdelaideNow	287,051	19,538,610	1.5%
The West Australian	182,498	19,538,610	0.9%
THE AUSTRALIAN	101,395	19,538,610	0.5%
Triple M Network	89,968	19,538,610	0.5%
Gold Coast Bulletin	86,088	19,538,610	0.4%
NT News	82,879	19,538,610	0.4%
Hit Network	64,916	19,538,610	0.3%
themercury.com.au	55,569	19,538,610	0.3%
Delicious.	42,114	19,538,610	0.2%
Geelong Advertiser.com.au	38,743	19,538,610	0.2%
Townsville Bulletin	34,130	19,538,610	0.2%
weeklytimesnow	25,215	19,538,610	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 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-patform 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