

NIELSEN DIGITAL LANDSCAPE REPORT

NOVEMBER 2020

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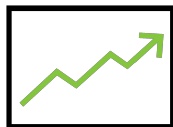
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KEY TAKEAWAYS



20 MILLION AUSTRALIAN WERE ONLINE THIS MONTH

20,995,000 Australian audiences or 92.7% of the potential Internet universe were browsing online.



TIME SPENT ONLINE HAS GROWN ON COMPUTER

Share of total time spent on computer has grown this month to 18%.



17 MILLION AUSTRALIAN WERE STREAMING THIS MONTH

17,124,382 Australian audiences or 87% of the potential Internet universe were streaming online.



AUDIENCE AND DEVICE BEHAVIOUR

TREND OF TOTAL ONLINE AUDIENCES



20.9M

Australians browsing online this month

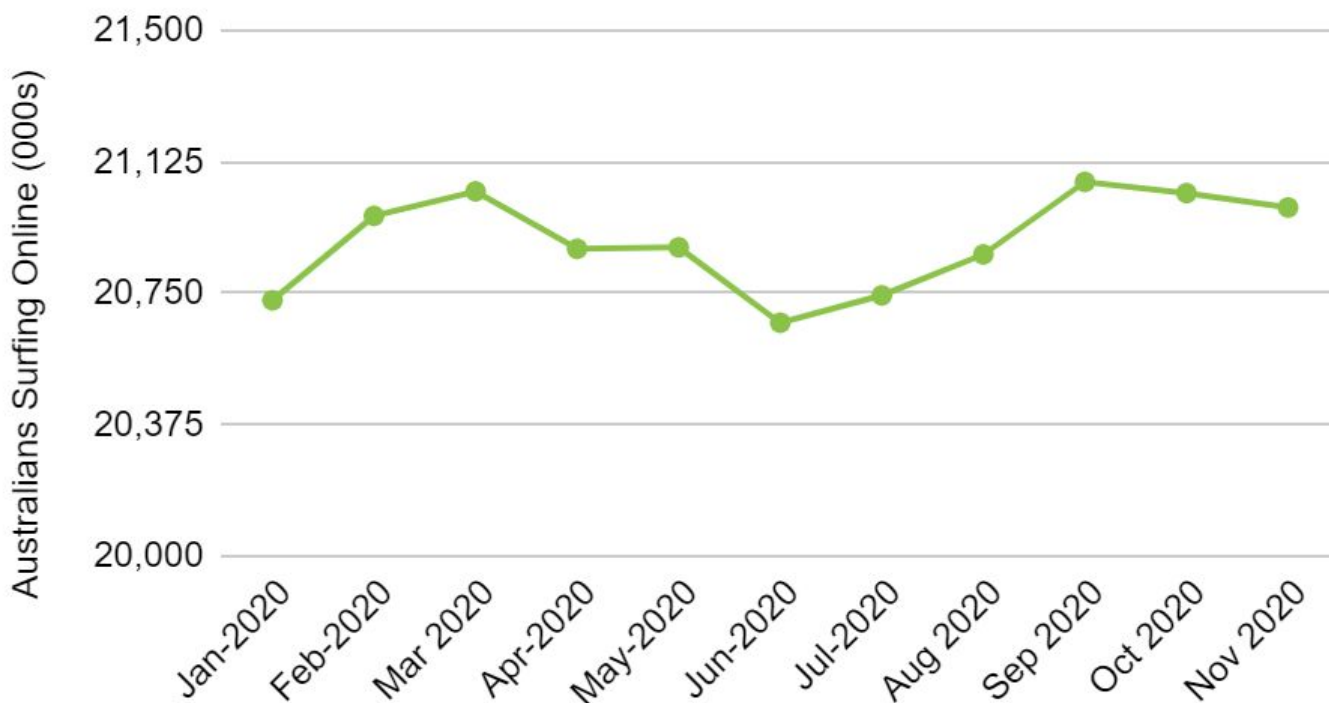
22.6M

Universe of potential online Australians

92.7%

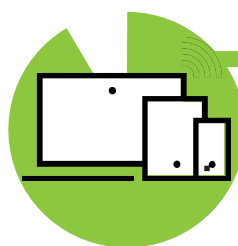
Of Australians surfing online this month

Source: Digital Content Planning, November 2020, Text, Digital (C/M), People 2+, Unique Audience, Universe, Reach %.



Source: Digital Content Planning, January 2020 - November 2020, Text, Digital (C/M), People 2+, Unique Audience.

HOW MANY ADULT AUSTRALIANS ARE REACHED ONLINE



92% on any digital device

Over 9 in 10 adult Australians (92%) or 18,244,000 Australian audiences can be reached online on any digital devices.



78% on computer

Nearly 4 in 5 adult Australians (78%) or 15,477,000 Australian audiences can be reached online on computer device.



87% on mobile

Nearly 9 in 10 adult Australians (87%) or 17,139,000 Australian audiences can be reached online on mobile device.

TREND OF TIME SPENT ONLINE



60.3%

of adult Australians online time is spent on Smartphone

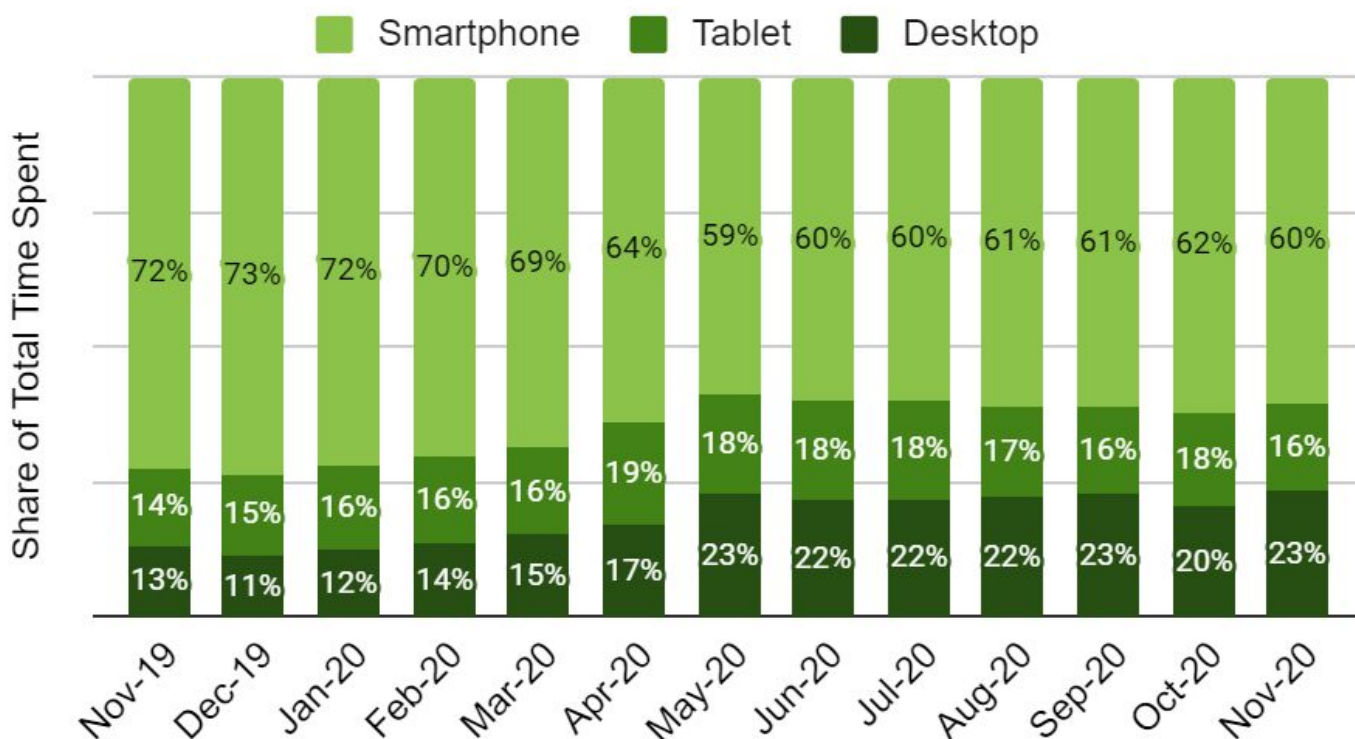
16.4%

of adult Australians online is time spent on Tablet

23.3%

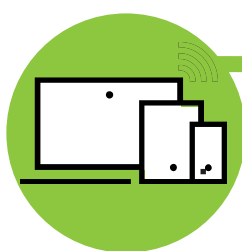
of adult Australians online is time spent on computer

Source: Nielsen Digital Content Ratings, Monthly Total, Nov 2020, Desktop, Smartphone, Tablet, P 18+, % of Total Time Spent, Text.



Source: Nielsen Digital Content Ratings, Monthly Total, Nov 2019 - Nov 2020, Desktop, Smartphone, Tablet, P 18+, % of Total Time Spent, Text. Please note from May 2020 an improvement was applied to android crediting for our mobile panels which more precisely captures user intended behaviour versus background activity such as notifications. This has resulted in a trend break.

HOW MUCH TIME AUSTRALIANS SPEND ONLINE IN A MONTH



96hrs per person on digital device

Australian adults spend a total of 1.75 billion hours on any online digital device, which averages to 96hrs 15mins per person in a month.



28hrs per person on computer

Australian adults spend a total of 445 million hours on computer devices, which averages to 28hrs 48mins per person in a month.

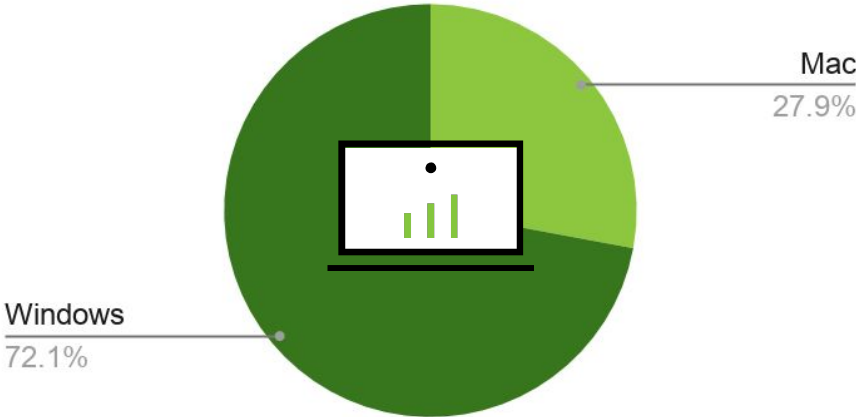


76hrs per person on mobile

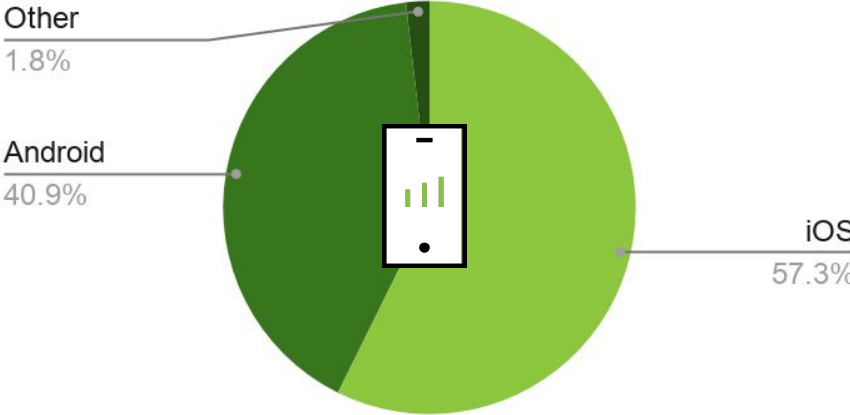
Australian adults spend a total of 1.31 billion hours on any mobile devices, which averages to 76hrs 26mins per person in a month.

DEVICE OWNERSHIP IN AUSTRALIA

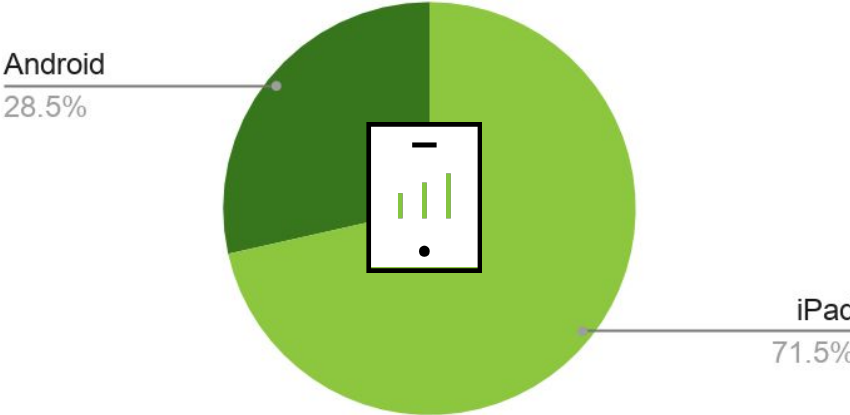
89%
of Australians
own a Computer



90%
of Australians
own a Smartphone



58%
of Australians own
a Tablet

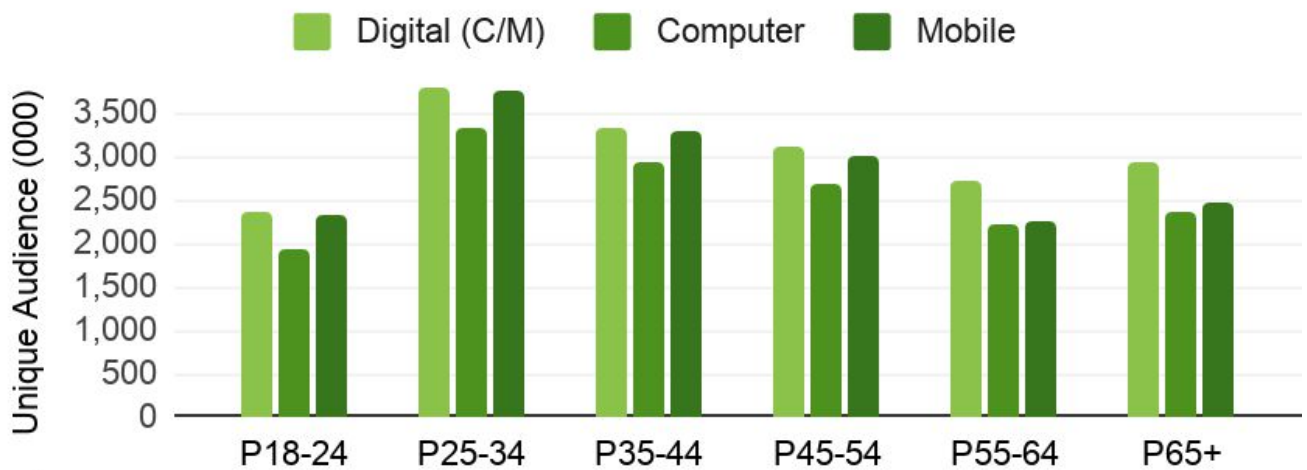


Source: IAB Australia, Enumeration Survey, September - November 2020, People 14+, Device Ownership & Trends

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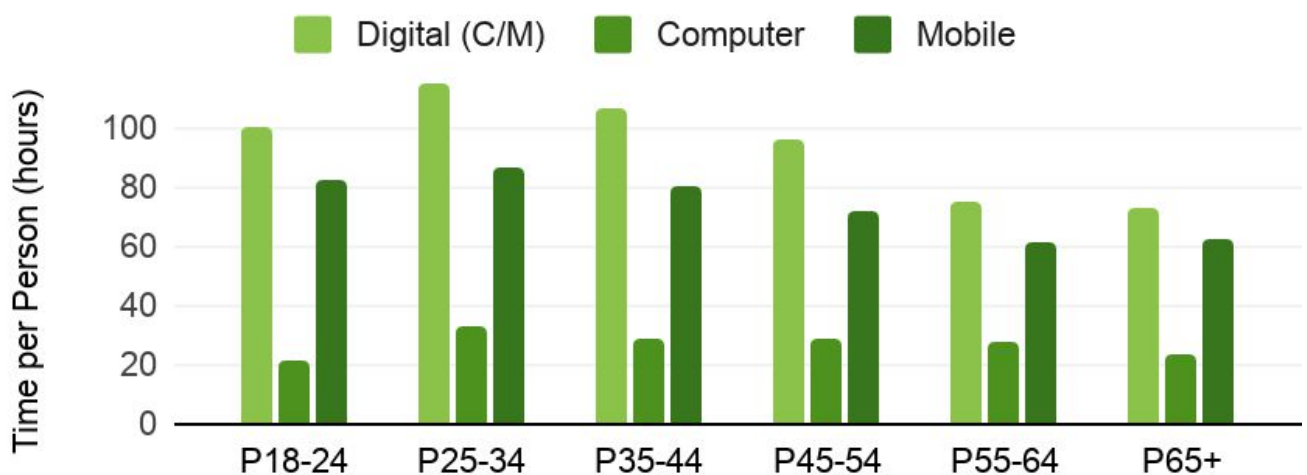
SURFING AUDIENCE BEHAVIOUR BY AGE GROUPS

UNIQUE AUDIENCE



Source: Digital Content Planning, Nov 2020, Text, Computer, Mobile, Various Demo, Unique Audience.

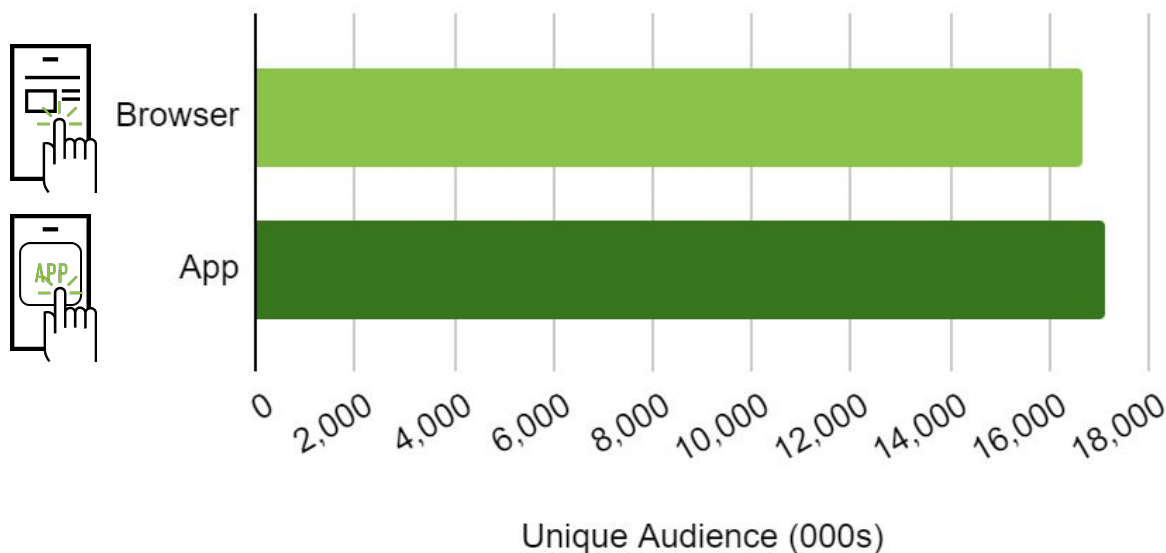
TIME SPENT PER PERSON



Source: Digital Content Planning, Nov 2020, Text, Computer, Mobile, Various Demo, Time Spent per Person (text).

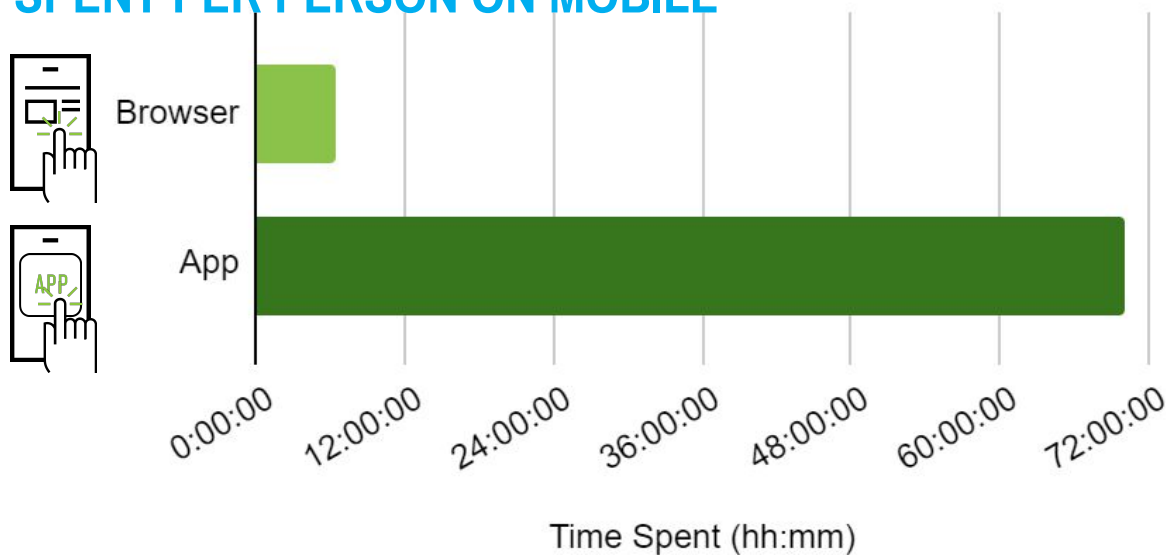
HOW AUDIENCE USE THEIR MOBILES? BROWSING SITES OR APPS

AUDIENCES USING MOBILE



Source: Digital Content Planning, November 2020, P18+, Mobile, Brower, App, Unique Audience.

TIME SPENT PER PERSON ON MOBILE



Source: Digital Content Planning, November 2020, P18+ Mobile, Brower, App, Time Spent per Person.



SURFING AND STREAMING BEHAVIOUR

WHERE ARE AUDIENCES SPENDING THEIR ONLINE TIME?



CURRENT EVENTS & GLOBAL NEWS

17.2M Adult Australians consumed news content, spending on average about **2:43:54 hours per person**.¹



SPORTS

14.7M Adult Australians consumed sport content, spending on average about **1:17:35 hours per person**.²



HOME & GARDEN

12.5M Adult Australians consumed home content, spending on average about **25:53 minutes per person**.³



FAMILY & LIFESTYLE

10.06M Adults Australians consumed lifestyle content, spending on average about **08:31 minutes per person**.⁴



REAL ESTATE

14.7M Adult Australians consumed real estate content, spending on average **49:23 minutes per person**.⁵



AUTOMOTIVE

11.3M Adult Australians consumed auto content, spending on average about **27:46 minutes per person**.⁶

1. Source: Digital Content Planning, November 2020, Text, Digital (C/M), Person 18+, Current Events & Global News subcategory, UA, Time Spent per Person.
2. Source: Digital Content Planning, November 2020, Text, Digital (C/M), Person 18+, Sports subcategory, UA, Time Spent per Person.
3. Source: Digital Content Planning, November 2020, Text, Digital (C/M), Person 18+, Home & Garden subcategory, UA, Time Spent per Person.
4. Source: Digital Content Planning, November 2020, Text, Digital (C/M), Person 18+, Multi-category Family & Lifestyles subcategory, UA, Time spent per Person.
5. Source: Digital Content Planning, November 2020, Text, Digital (C/M), Person 18+, Real Estate/Apartments subcategory, UA, Times Spent per Person.
6. Source: Digital Content Planning, November 2020, Text, Digital (C/M), Person 18+, Automotive Category, UA, Times Spent per Person.

TOP TEN MEDIA OWNERS - ALL CATEGORIES

Media Owner	Unique Audience (000s)
Google	19,998
Facebook	18,026
Microsoft	17,407
News Corp Australia	16,610
Nine Entertainment Co	15,676
eBay	14,758
Australian Federal Government	14,739
Australian Broadcasting Corporation	13,590
Woolworths	13,418
Amazon	12,466

Source: Nielsen Digital Content Planning, November 2020, People 2+, Digital (C/M), Text, All Parents, Unique Audience

TOP BRANDS THAT AUDIENCES ARE BROWSING - ALL CATEGORIES

Brand Level Entity Name	Unique Audience	Avg Time Spent (hh:mm:ss)
Google	↓ 19,823,292	↑ 8:25:06
Facebook	↓ 17,818,611	↓ 17:13:08
MSN/Outlook/Bing/Skype	↑ 14,353,932	↓ 2:57:47
ABC Online Network*	↑ 13,587,192	↑ 1:17:59
Instagram	↓ 13,569,238	↓ 3:06:28
Microsoft	↑ 13,162,225	↓ 1:52:28
realestate.com.au*	↑ 13,090,549	↓ 0:42:13
eBay	↑ 12,778,060	↑ 1:19:58
Apple	↑ 12,279,940	↓ 2:10:41
PayPal	↑ 12,203,389	↓ 0:08:02

*Brands marked with an asterisk represent metrics from tagged methodology.

↑↓ Indicates UA MoM growth or decline greater than 1% | ⇨ Indicates UA MoM growth or decline of less than 1%.

Source: Digital Content Ratings, Monthly Total, Text, November 2020, People 2+, Unique Audience, Avg Time Spent.

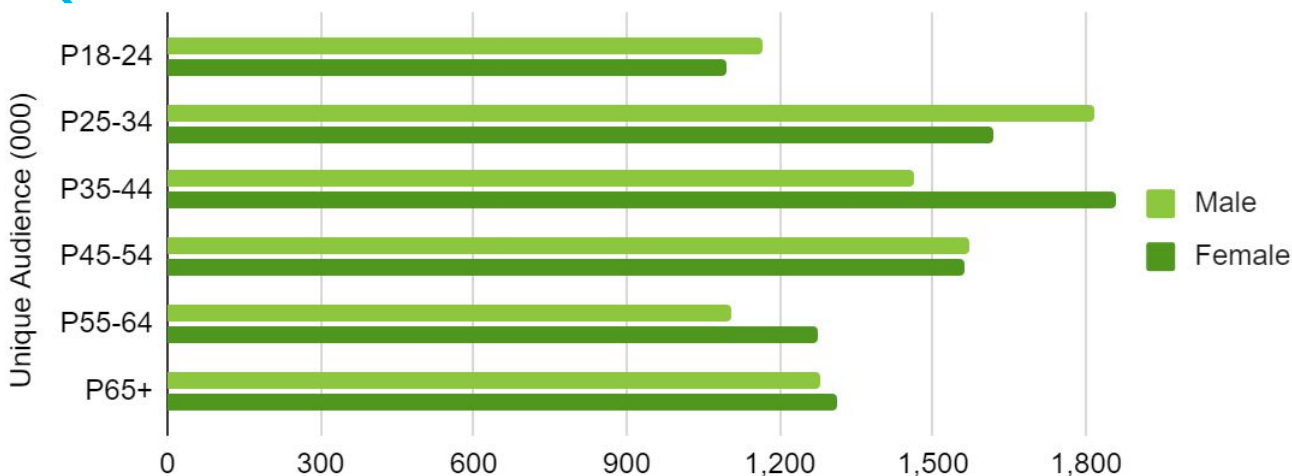
STREAMING AUDIENCE BEHAVIOUR BY AGE GROUPS

POPULATION BASE | 19,774,230

17,124,382 or 87% of adult Australians were streaming online.

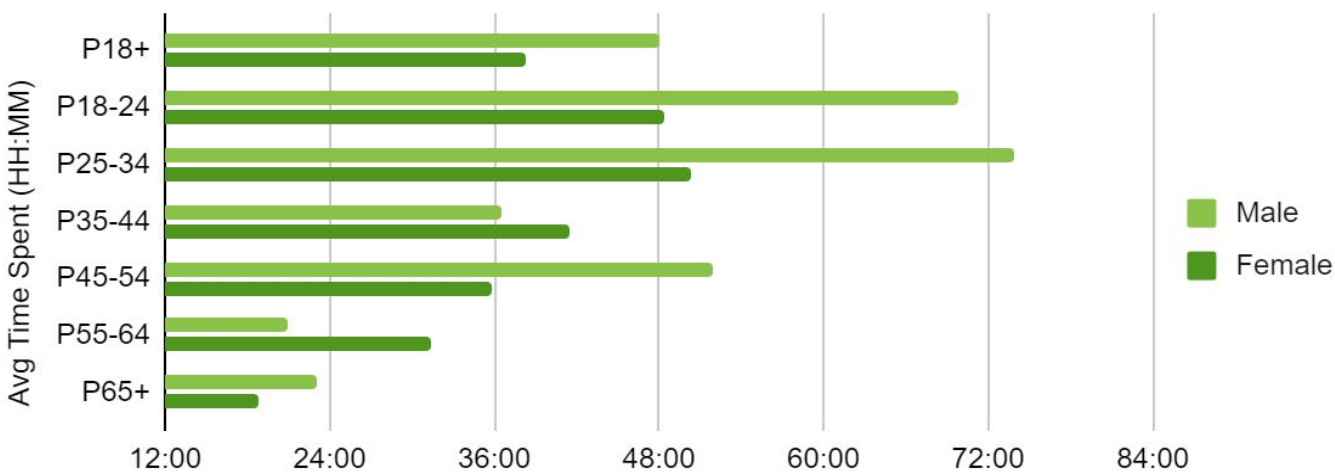
Source: Nielsen Digital Content Ratings, Video, November 2020, People 18+, Universe, UA, Universe Reach, Panel + Census

UNIQUE AUDIENCE



Source: Nielsen Digital Content Ratings, Video, November 2020, People 18+, Unique Audience, Panel + Census

TIME SPENT PER PERSON



Source: Nielsen Digital Content Ratings, Video, November 2020, People 18+, Avg Time Spent, Panel + Census

TOP STREAMING BRANDS WITH GREATEST VIDEO CONSUMPTION

Chart displays the top IAB Endorsed brands tagged with the Nielsen SDK and 2 secs qualifier, ranked by total time spent.

Name	Total Time Spent (hours)
YouTube	↓ 447,409,050
9Now	↓ 3,918,434
SWM 7	↑ 3,644,452
Network 10	↓ 701,891
nine.com.au	↓ 477,485
news.com.au	↑ 423,294
Daily Mail Australia	↓ 245,171
taste.com.au	↓ 22,249
perthnow	↓ 20,071
Herald Sun	↓ 14,217

↑↓ Indicates UA MoM growth or decline greater than 1% | ⇨ Indicates UA MoM growth or decline of less than 1%.

* Youtube data: Nielsen Digital Content Ratings, Monthly Tagged, Video, 2 secs Qualifier, Total Ad Supported, November 2020, People 2+, Digital (C/M), Total Time Spent (minutes).

Source: Nielsen Digital Content Ratings, Monthly Tagged, Video, 2 secs Qualifier, Ad Supported (Video), November 2020, People 18+, Digital (C/M), Total Time Spent (minutes).