

NIELSEN DIGITAL LANDSCAPE REPORT

December 2020

CONTENTS

Device Usage Behaviour	4
Trend of Total Online Audiences	
How Many Australians are Reached Online	
Trend of Time Spent Online	
How Much Time Australian are Spending Online	
Device Ownership in Australia	
Surfing Audience Behaviour by Age Groups	
How Audiences Use Their Mobiles - Browsing Sites and Apps	

Surfing and Streaming Behaviour	12
Top Ten Media Media Owners - All Categories	
Top Brands That Audiences Are Browsing - All Categories	
Where Are Audience Spending Their Online Time	
Streaming Audience Behaviour by Age Groups	
Top Streaming Brands with Greatest Video Consumption	

KEY TAKEAWAYS



20.9 MILLION AUSTRALIANS WERE ONLINE THIS MONTH

92.6% of adult Australians were browsing online¹



16.9 MILLION ADULT AUSTRALIANS WERE STREAMING THIS MONTH

86.8% of adult Australians were streaming online²



TIME SPENT ONLINE HAS GROWN ON SMARTPHONE

Total time spent on smartphone by adult Australians has grown to 63.7%³

1. Source: Nielsen Digital Content Planning, December 2020, Text, Digital (C/M), People 2+, Unique Audience, Universe Reach %.
 2. Source: Nielsen Digital Content Ratings, Video, December 2020, People 18+, UA, Universe Reach, Panel + Census
 3. Source: Nielsen Digital Content Ratings, Monthly Total, Dec 2020, Smartphone, P 18+, % of Total Time Spent, Text.



AUDIENCE AND DEVICE BEHAVIOUR

TREND OF TOTAL ONLINE AUDIENCES



18.2M

Number of Australian adults browsing online

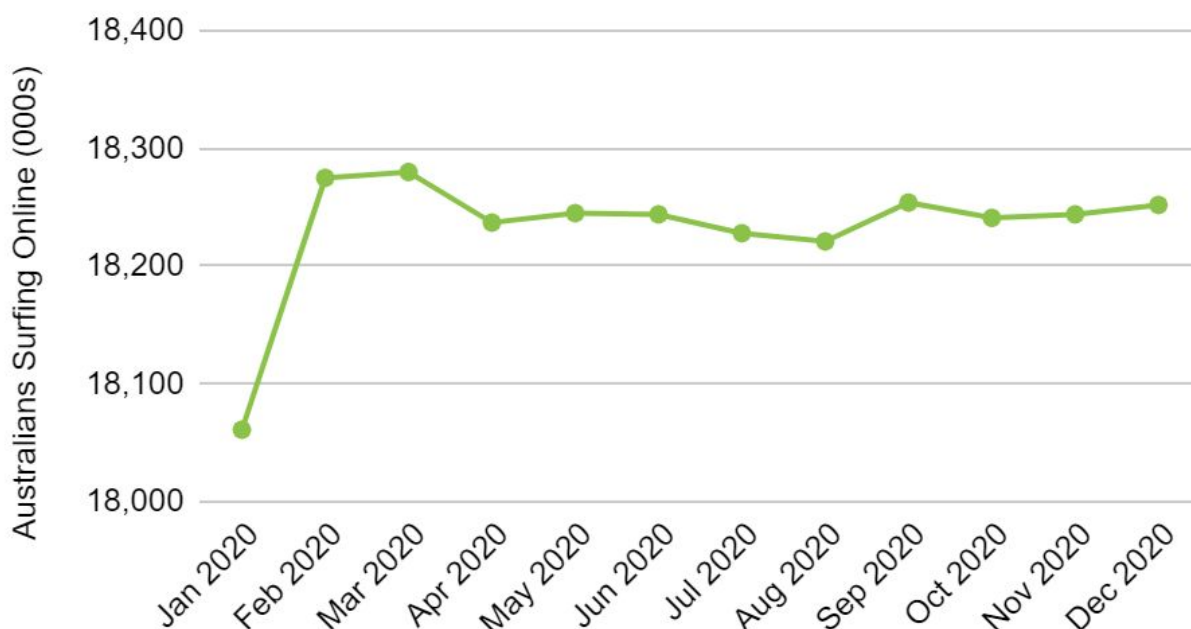
19.7M

The Universe of potential online Australians adults

92.3%

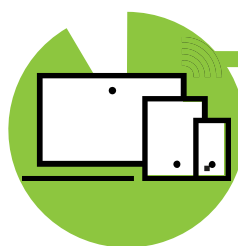
Of Australians adults browsing online

Source: Nielsen Digital Content Planning, December 2020, Text, Digital (C/M), People 18+, Unique Audience, Universe, Reach %.
 Note: Mobile data does not capture Persons 0-17



Source: Digital Content Planning, January 2020 - December 2020, Text, Digital (C/M), People 18+, Unique Audience.

HOW MANY ADULT AUSTRALIANS ARE REACHED ONLINE



92% on any digital device

Over 9 in 10 adult Australians (92%) or 18,252,000 Australian audiences can be reached online on any digital devices.¹



79% on computer

Nearly 4 in 5 adult Australians (79%) or 15,626,000 Australian audiences can be reached online on computer device.²



87% on mobile

Nearly 9 in 10 adult Australians (87%) or 17,163,000 Australian audiences can be reached online on mobile device.³

1. Source: Nielsen Digital Content Planning, December 2020, Text, Digital (C/M), P18+, Unique Audience, Universe Reach %,
2. Source: Nielsen Digital Content Planning, December 2020, Text, Computer, P18+, Unique Audience, Universe Reach %,
3. Source: Nielsen Digital Content Planning, December 2020, Text, Mobile, P18+, Unique Audience, Universe Reach %,

TREND OF TIME SPENT ONLINE



63.7%

of adult Australians online time is spent on Smartphone¹

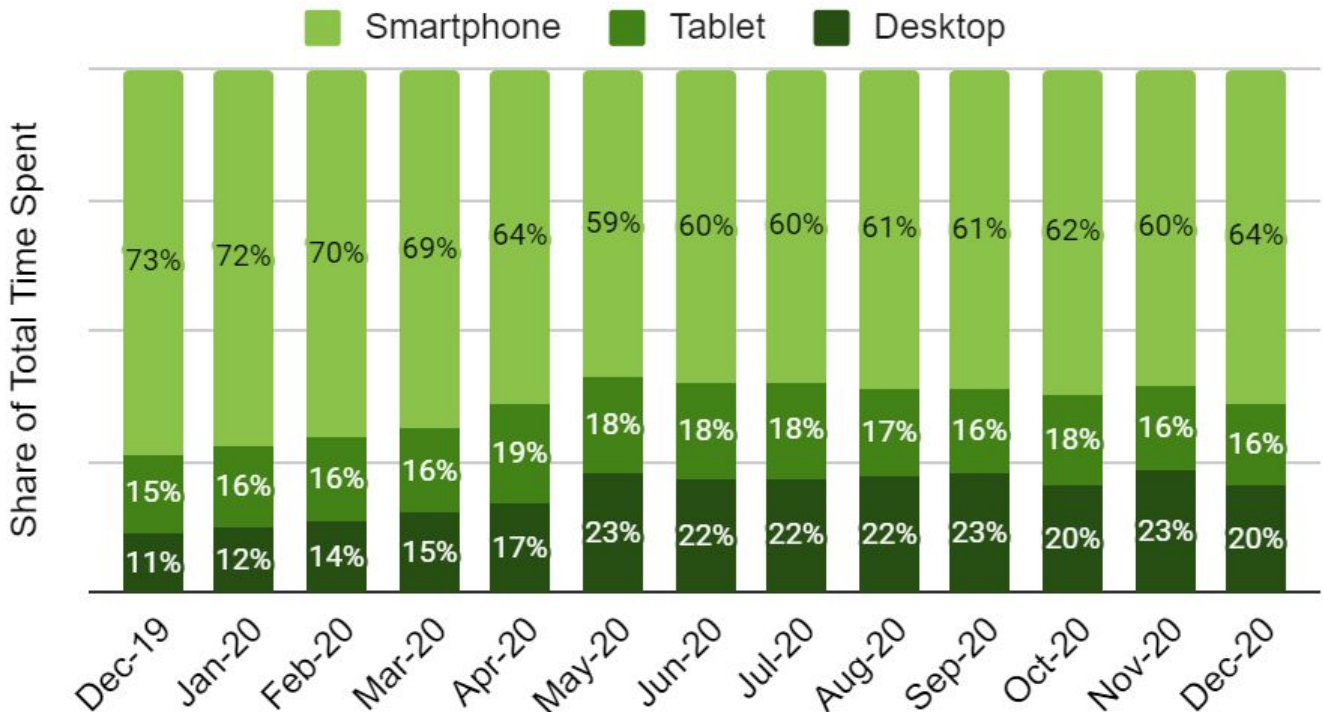
15.9%

of adult Australians online time is spent on Tablet²

20.4%

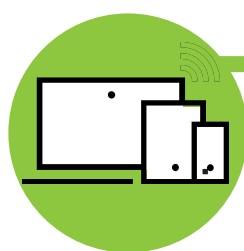
of adult Australians online time is spent on computer³

1. Source: Nielsen Digital Content Ratings, Monthly Total, Dec 2020, Smartphone, P18+, % of Total Time Spent, Text.
2. Source: Nielsen Digital Content Ratings, Monthly Total, Dec 2020, Tablet, P18+, % of Total Time Spent, Text.
3. Source: Nielsen Digital Content Ratings, Monthly Total, Dec 2020, Desktop, P18+, % of Total Time Spent, Text.



Source: Nielsen Digital Content Ratings, Monthly Total, Dec 2019 - Dec 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 ARE ADULT AUSTRALIANS SPENDING ONLINE



93hrs per person on any device

Australian adults spend a total of 1.7 billion hours on any digital device, which averages to 93hrs 43mins per person in a month.¹



24hrs per person on computer

Australian adults spend a total of 382 million hours on computer devices, which averages to 24hrs 26mins per person in a month.²



77hrs per person on mobile

Australian adults spend a total of 1.3 billion hours on any mobile devices, which averages to 77hrs 25mins per person in a month.³

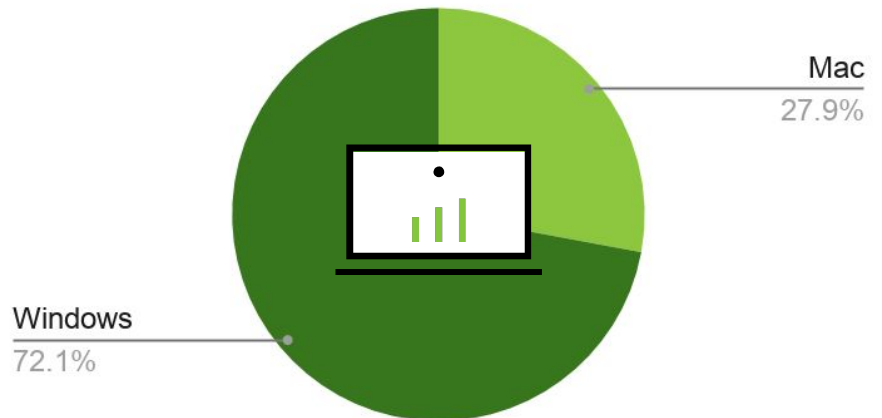
1. Source: Nielsen Digital Content Planning, December 2020, Text, Digital (C/M), P18+, Total Time Spent, Time Spent per Person (text).

2. Source: Nielsen Digital Content Planning, December 2020, Text, Computer, P18+, Total Time Spent, Time Spent per Person (text).

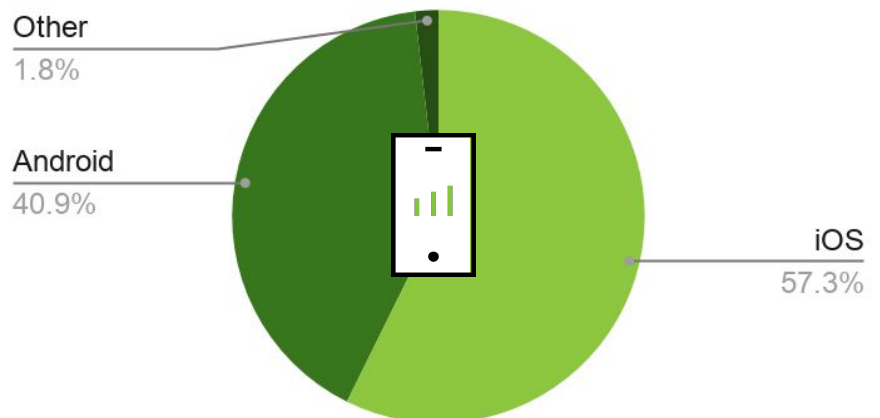
3. Source: Nielsen Digital Content Planning, December 2020, Text, Mobile, P18+, Total Time Spent, Time Spent per Person (text).

DEVICE OWNERSHIP IN AUSTRALIA

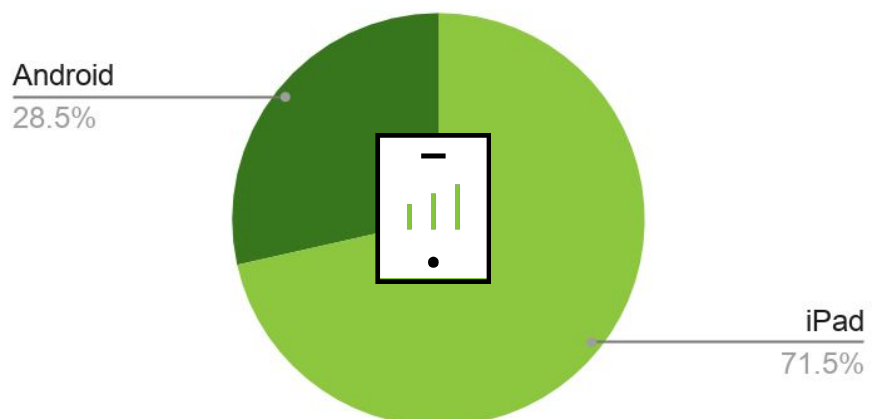
89%
of Australians
own a Computer



90%
of Australians
own a Smartphone

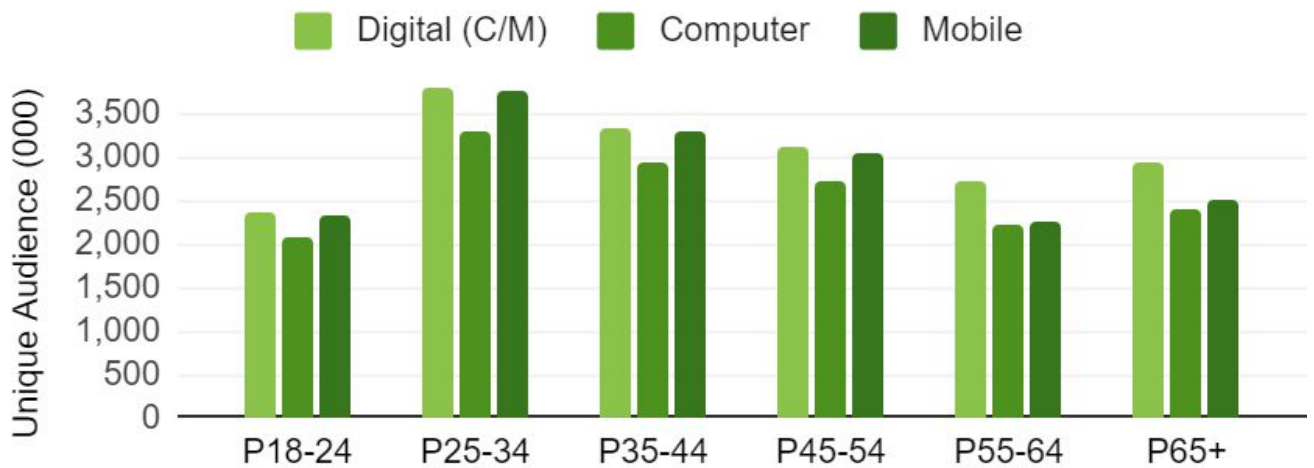


58%
of Australians own
a Tablet



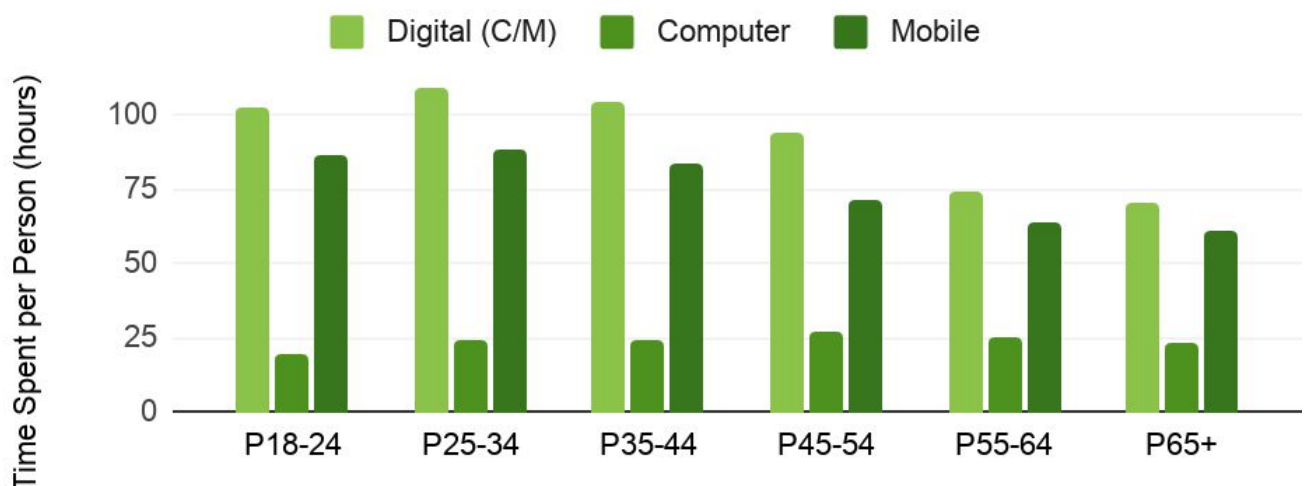
SURFING ADULT AUDIENCE BEHAVIOUR BY AGE GROUPS

UNIQUE AUDIENCE



Source: Digital Content Planning, Dec 2020, Text, Computer, Mobile, P18-24, P25,34, P35-44, P45-54, P54-65, P65+, Unique Audience.

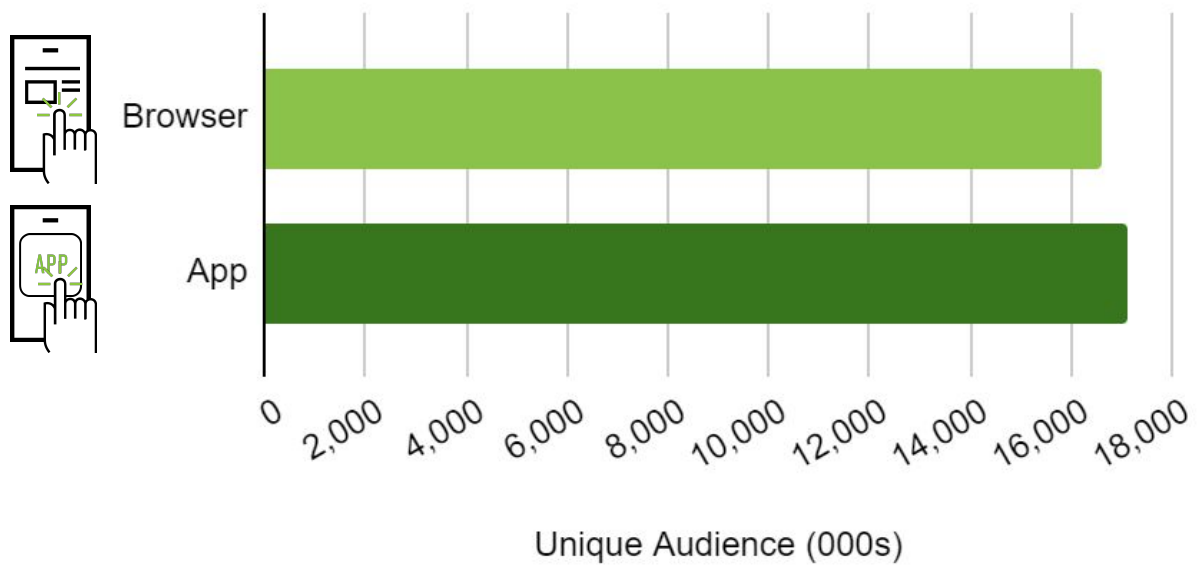
TIME SPENT PER PERSON



Source: Digital Content Planning, Dec 2020, Text, Computer, Mobile, P18-24, P25,34, P35-44, P45-54, P54-65, P65+, Time Spent per Person (text).

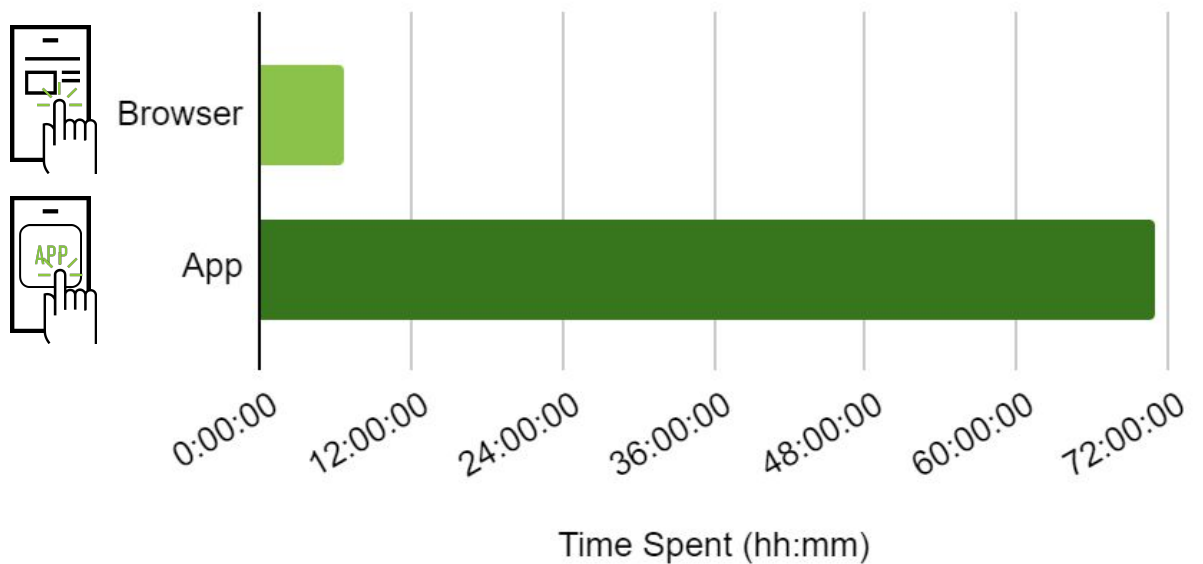
HOW ADULT AUDIENCES USE THEIR MOBILES? BROWSING SITES OR APPS

AUDIENCES USING MOBILE



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

TIME SPENT PER PERSON ON MOBILE



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



SURFING AND STREAMING BEHAVIOUR

WHERE ARE ADULT AUDIENCES SPENDING THEIR ONLINE TIME?



CURRENT EVENTS & GLOBAL NEWS

17.1M Adult Australians consumed news content, spending on average about **2:23:22 hours per person**.¹



SPORTS

12.4M Adult Australians consumed sport content, spending on average about **1:15:32 hours per person**.²



HOME & GARDEN

12.5M Adult Australians consumed home content, spending on average about **27:06 minutes per person**.³



FAMILY & LIFESTYLE

10.16M Adults Australians consumed lifestyle content, spending on average about **08:31 minutes per person**.⁴



REAL ESTATE

14.0M Adult Australians consumed real estate content, spending on average about **45:07 minutes per person**.⁵



AUTOMOTIVE

11.5M Adult Australians consumed auto content, spending on average about **28:46 minutes per person**.⁶

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

TOP TEN MEDIA OWNERS - ALL CATEGORIES

Parent Level Entity Name	Unique Audience (000s)
Google	18,045
Facebook	17,540
Microsoft	16,347
News Corp Australia	16,039
Nine Entertainment Co	15,119
eBay	14,709
Australian Federal Government	14,669
Woolworths	13,698
Australian Broadcasting Corporation	12,818
Coles Group	12,757

Source: Nielsen Digital Content Planning, December 2020, People 18+, Digital (C/M), Text, All Parents, Unique Audience

TOP BRANDS ADULT AUDIENCES ARE BROWSING - ALL CATEGORIES

Brand Level Entity Name	Unique Audience	Avg Time Spent (hh:mm:ss)
Google	↑ 17,982,793	↓ 8:50:12
Facebook	↑ 17,379,925	↓ 17:01:15
MSN/Outlook/Bing/Skype	↔ 13,542,492	↓ 2:50:42
Instagram	↔ 13,432,572	↑ 3:44:18
eBay	↑ 12,990,767	↓ 1:11:40
ABC Online Network	↓ 12,801,240	↓ 1:08:12
Microsoft	↔ 12,566,143	↓ 1:30:11
Apple	↔ 12,193,951	↓ 2:10:08
PayPal	↑ 12,109,433	↓ 0:07:51
Woolworths	↑ 12,078,003	↑ 0:35:03

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

↑↓ Indicates UA MoM growth or decline greater than 0.5% | ↔ Indicates UA MoM growth or decline of less than 0.5%.

Source: Digital Content Ratings, Monthly Total, Text, December 2020, People 18+, Unique Audience, Avg Time Spent.

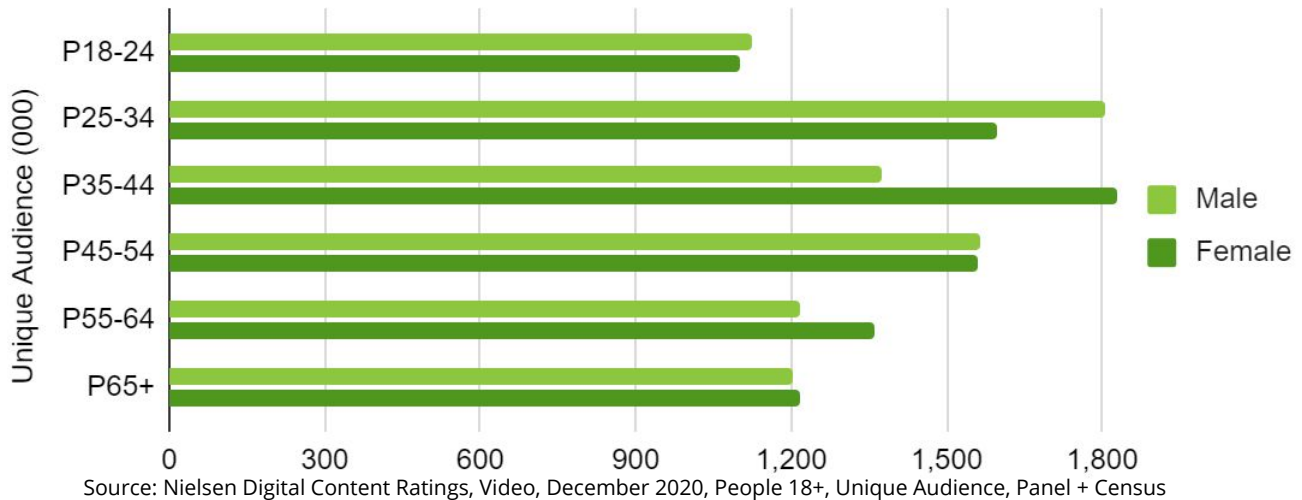
STREAMING ADULT AUDIENCE BEHAVIOUR BY AGE GROUPS

POPULATION BASE | 19,538,610

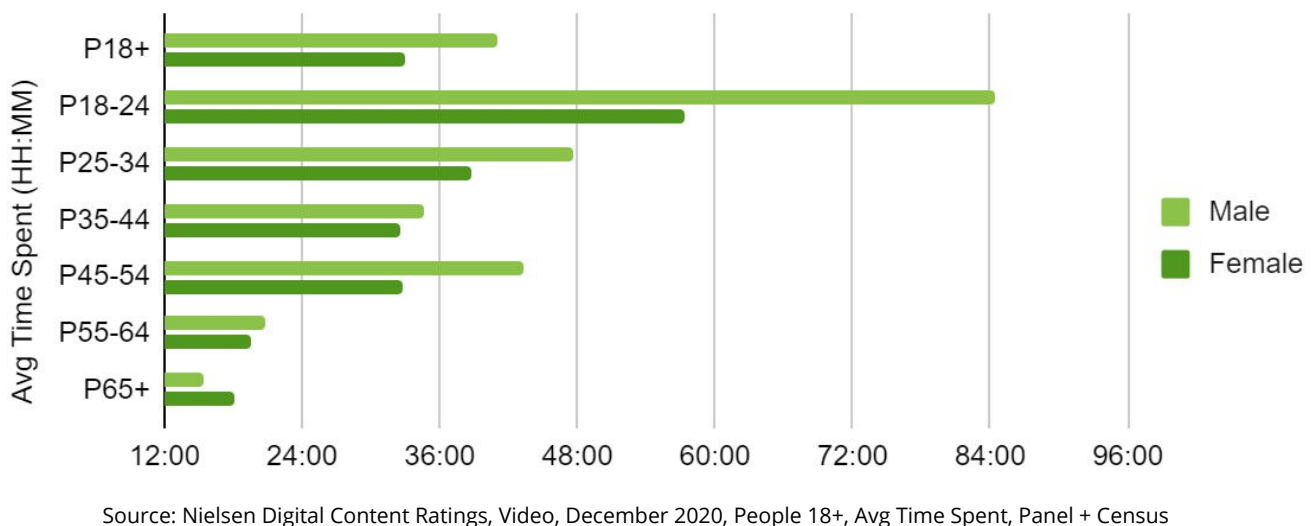
16,951,773 or 86.8% of adult Australians were streaming online.

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

UNIQUE AUDIENCE



TIME SPENT PER PERSON



TOP STREAMING BRANDS WITH GREATEST VIDEO CONSUMPTION

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

Brand Level Entity Name	Total Time Spent (hours)
YouTube	↑ 458,843,636
SWM 7	↓ 2,910,545
9Now	↓ 2,861,116
Network 10	↓ 438,074
nine.com.au	↓ 388,230
news.com.au	↓ 387,724
Daily Mail Australia	↑ 355,923
taste.com.au	↑ 37,514
perthnow	↑ 22,679
Herald Sun	↓ 11,696

↑↓ Indicates UA MoM growth or decline greater than 1% | ⇄ Indicates UA MoM growth or decline of less than 1%.
 Source: Nielsen Digital Content Ratings, Monthly Tagged, Video, 2 secs Qualifier, Total Ad Supported, December 2020, People 2+, Digital (C/M), Total Time Spent (minutes).

