

State of the market report - Australia

Nielsen Online Ratings



October 2011



The internet now ingrained in the everyday life of Australian consumers...

With over 20 million Australians now enjoying access to the internet, what we watch and buy, and how we consume and engage with media, is rapidly evolving. The amount of time spent online is increasing – through social networking and websites becoming more and more interactive.

Mobile internet multimedia devices, are presenting more customer touch points for presenting content and choices for communication distribution. The ‘anywhere anytime’ nature of the internet, means that consumers can source information, entertainment and other tools, often in tandem with other media.

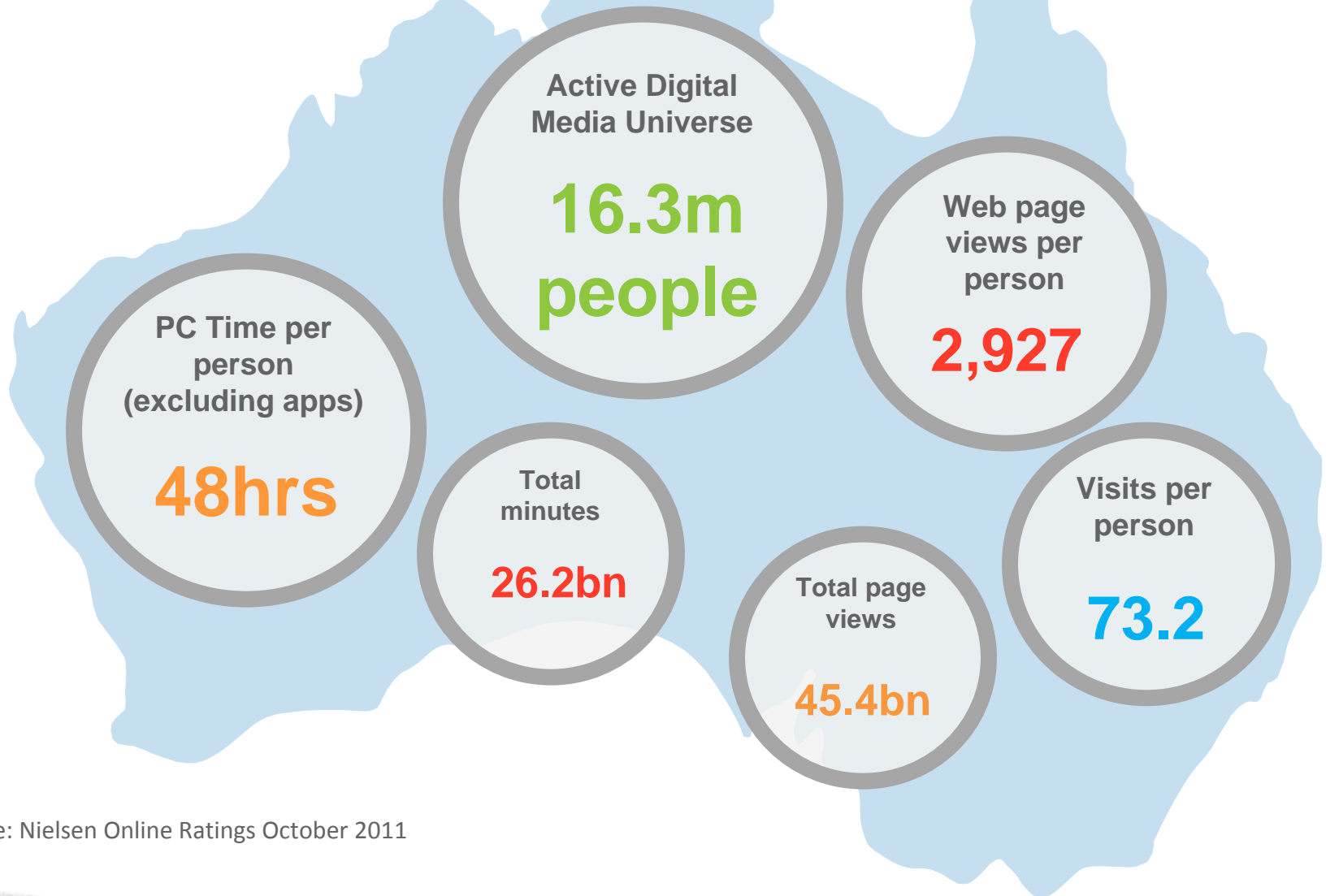
The Nielsen Online Ratings now provides the online media industry and marketers with a single set of industry endorsed metrics, which quantifies how many human beings – not browsers – are visiting and interacting with websites.

Matt Bruce –Managing Director, Nielsen Audience Measurement APMEA

The Nielsen logo is displayed within a light blue circular graphic. The word "nielsen" is written in a lowercase, serif font. Below the text, there are seven small, dark blue dots arranged in a horizontal line.

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Australian online universe - key statistics



Source: Nielsen Online Ratings October 2011

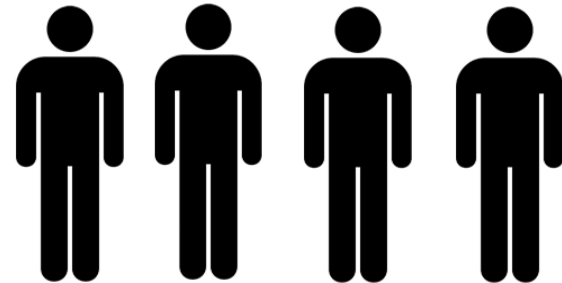
How many of Australia's 21.9 million people are online?



20.1m Active

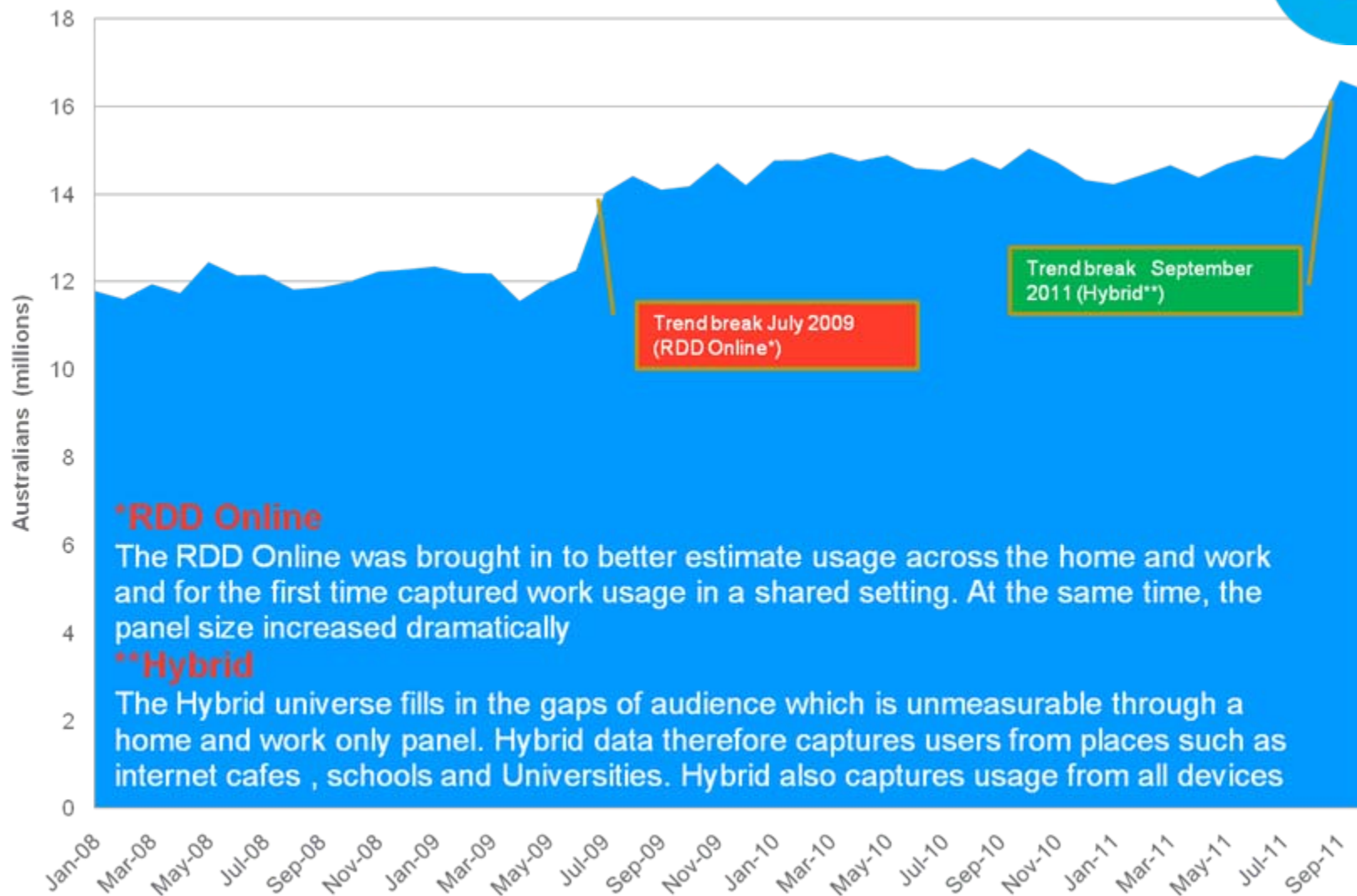


16.3m - Active Monthly



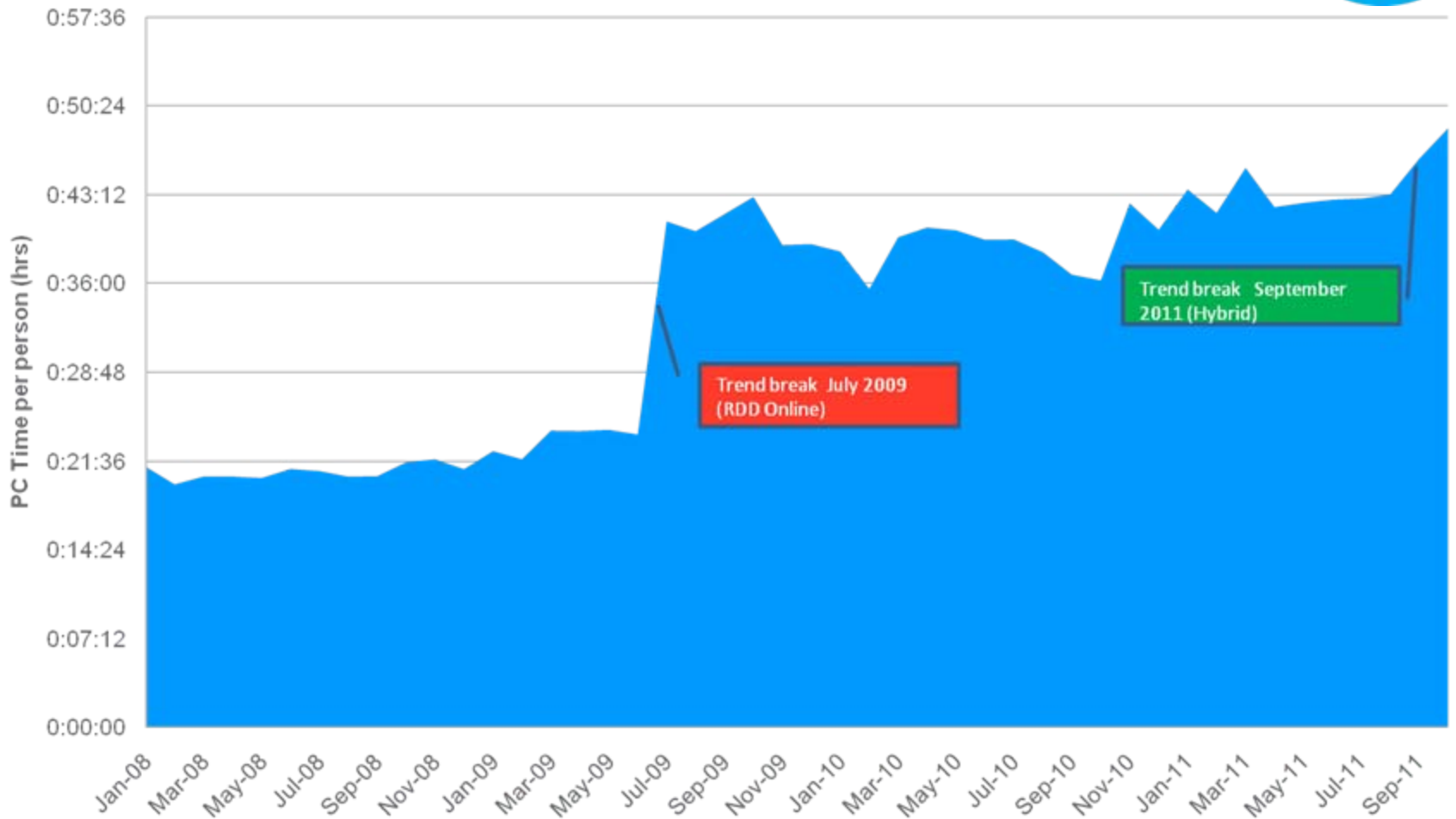
Source: Nielsen Online Ratings October 2011

Online universe usage over time



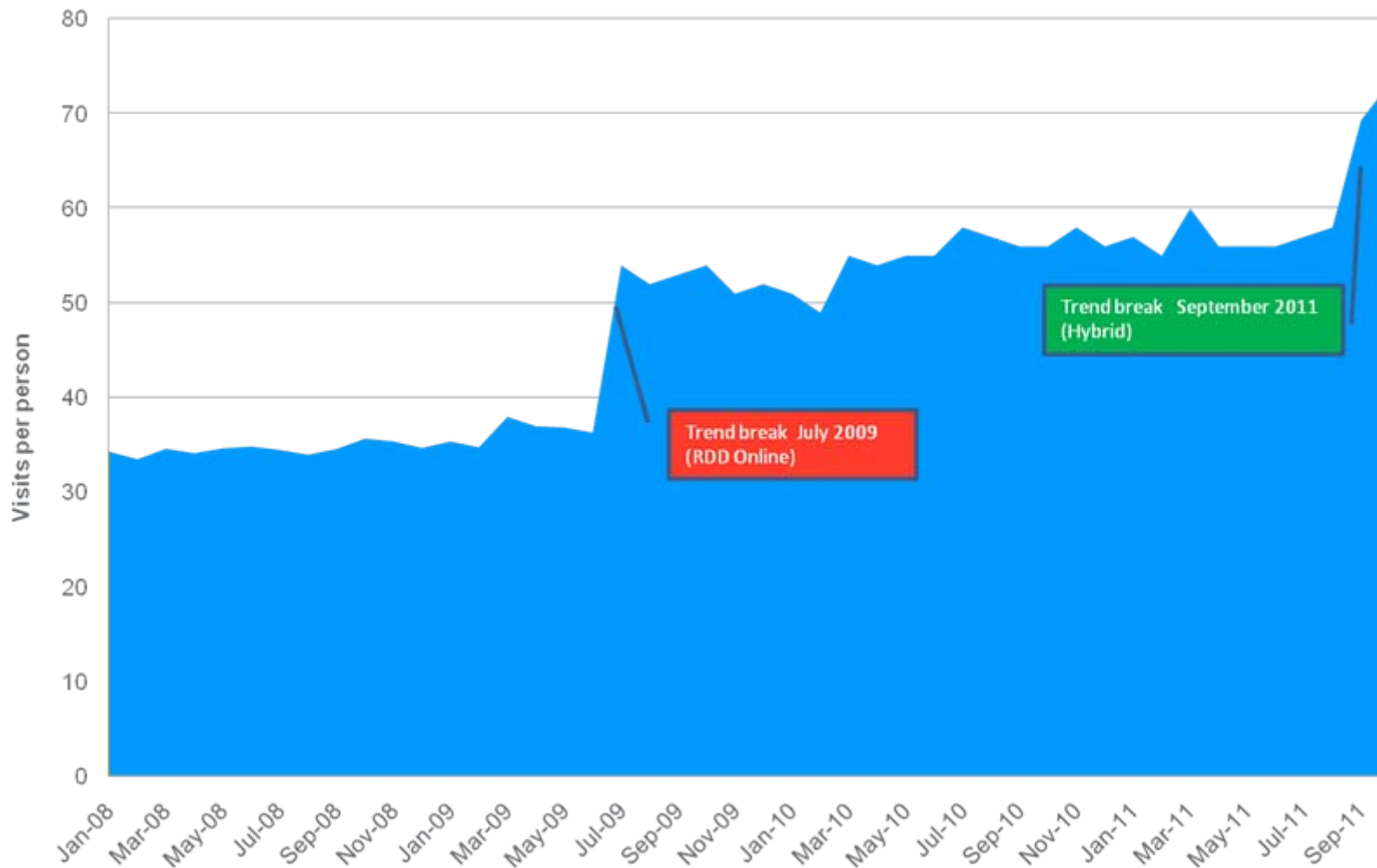
Source: Nielsen Online Ratings October 2011

PC time per person (excluding apps)



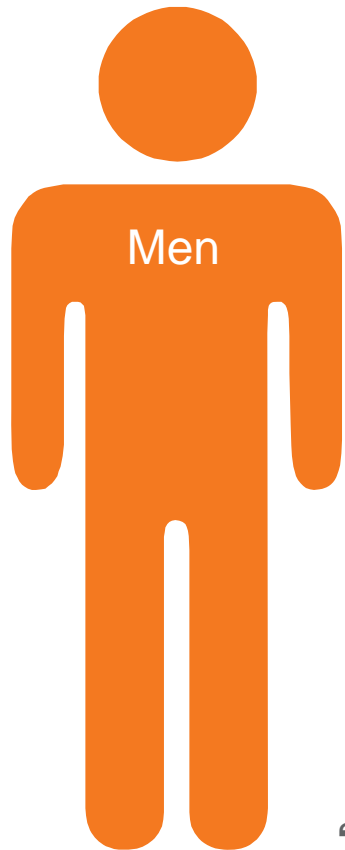
Source: Nielsen Online Ratings October 2011

Visits per person



Source: Nielsen Online Ratings October 2011

Men and Women – online gender nuances



50%	% of online Australians	50%
2836	Average pages viewed per month	3017
74	# visits per month	72
74hrs	Average PC time per month	69hrs

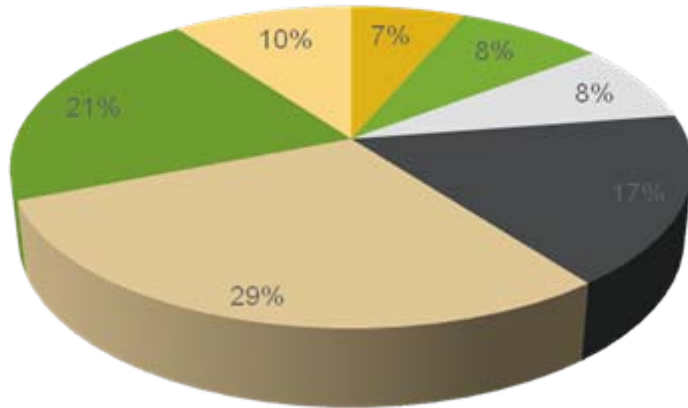


“Whilst men spend significantly longer online per month, women have higher activity rates”

Source: Nielsen Online Ratings October 2011

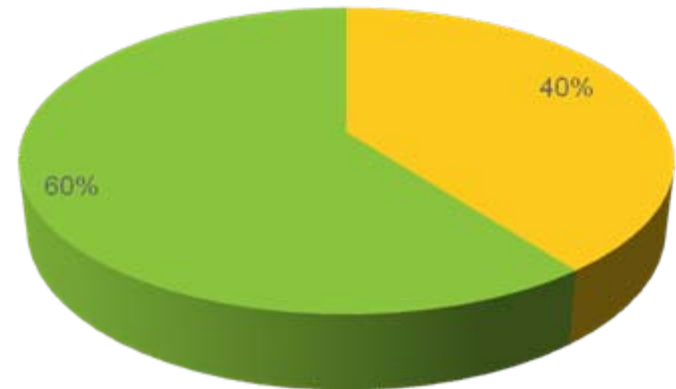
As the Web has become ubiquitous, it is now shedding its younger skew

■ 2 - 11 ■ 12 - 17 ■ 18 - 24 ■ 25 - 34 ■ 35 - 49 ■ 50 - 64 ■ 65+



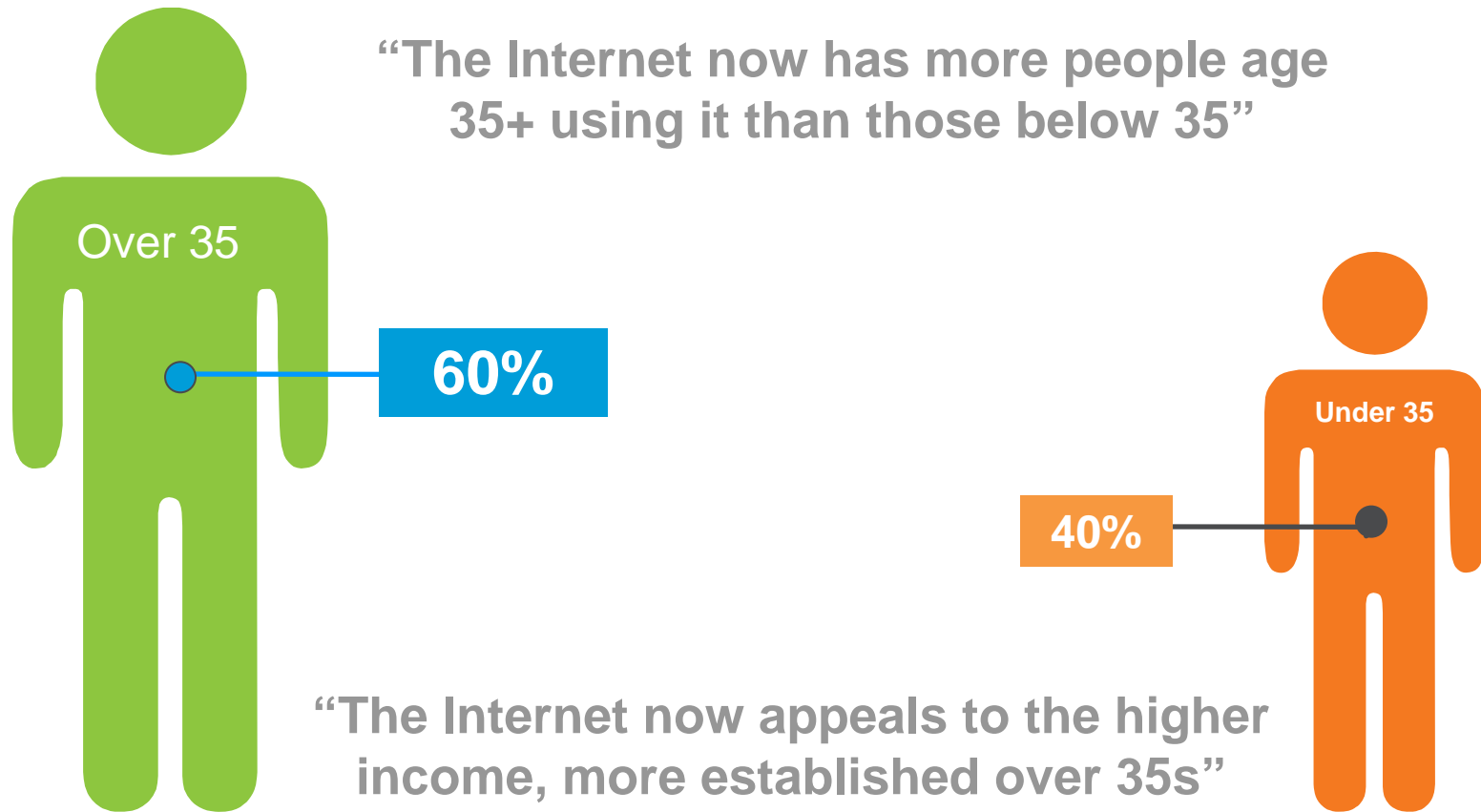
“The Web now reaches more people over the age of 35 than under”

■ Below 35 ■ Above 35



Source: Nielsen Online Ratings October 2011

The age divide closely resembles the Australian population and leans heavily to the over 35s



Source: Nielsen Online Ratings October 2011

Top Brands Unique Audiences in October



“No change to the top 10 brands Unique audience rankings, which were generally stable”

Top 10 Brands	Rank (Oct 11)	Unique Audience (000) Oct 11	Rank (Sept 11)	Unique Audience (000) Sep 11	% Change M-on-M
Google	1	14114	1	14384	-2%
Facebook	2	11203	2	11482	-2%
NineMSN/MSN	3	10894	3	11123	-2%
YouTube	4	8947	4	9067	-1%
Microsoft	5	8837	5	8586	3%
Yahoo!7	6	8125	6	8583	-5%
Wikipedia	7	7193	7	7224	0%
eBay	8	6980	8	6826	2%
Apple	9	6879	9	6552	5%
Blogger	10	4550	10	4348	5%

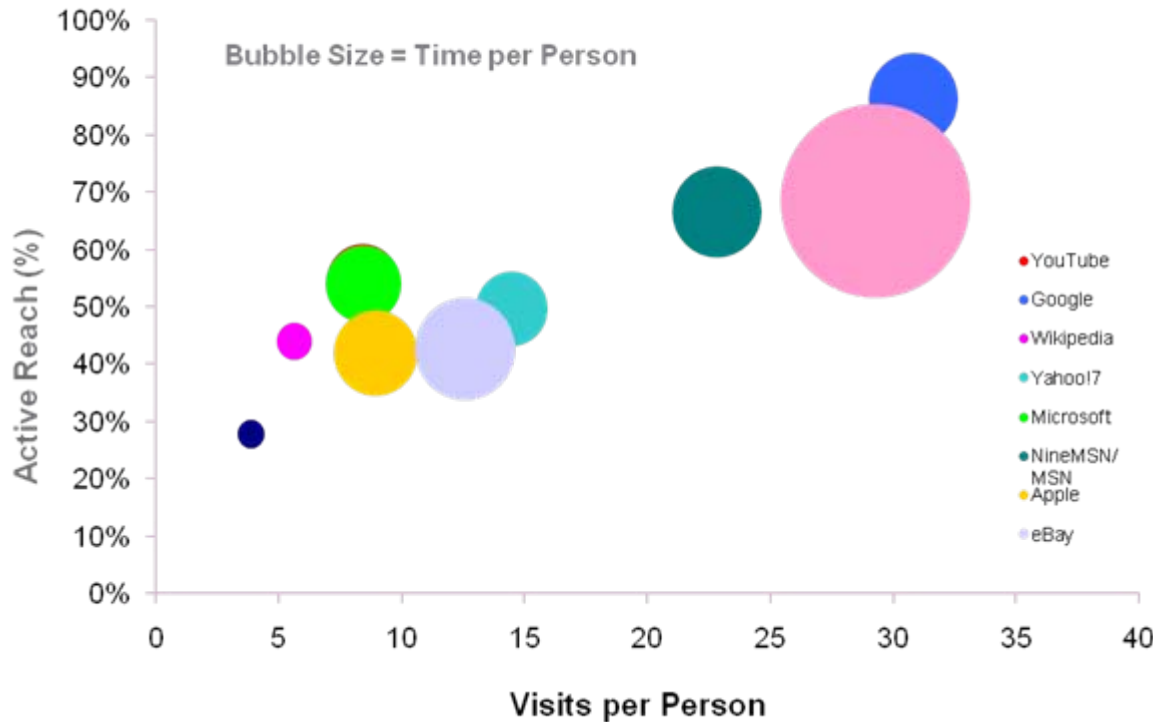
“Five of the six top brands saw a mild decline due to a month on month active universe decrease”

Source: Nielsen Online Ratings October 2011

Top 10 Brands – stickiness*



“One in every four minutes that Australians spent on the Web in October was spent on Facebook”



Top 10 brands	Visits Per Person	Active Reach	Time Per Person
Google	30.85	86%	1:43:49
Facebook	29.3	68%	7:31:58
NineMSN/MSN	22.86	67%	1:42:16
YouTube	8.43	55%	1:04:38
Microsoft	8.48	54%	1:11:54
Yahoo!7	14.52	50%	1:06:23
Wikipedia	5.66	44%	0:16:45
eBay	12.61	43%	2:08:12
Apple	8.95	42%	1:28:56
Blogger	3.88	28%	0:09:26

Source: Nielsen Online Ratings October 2011

*Stickiness is a custom visualization derived from reach, time and visits – not a standalone metric

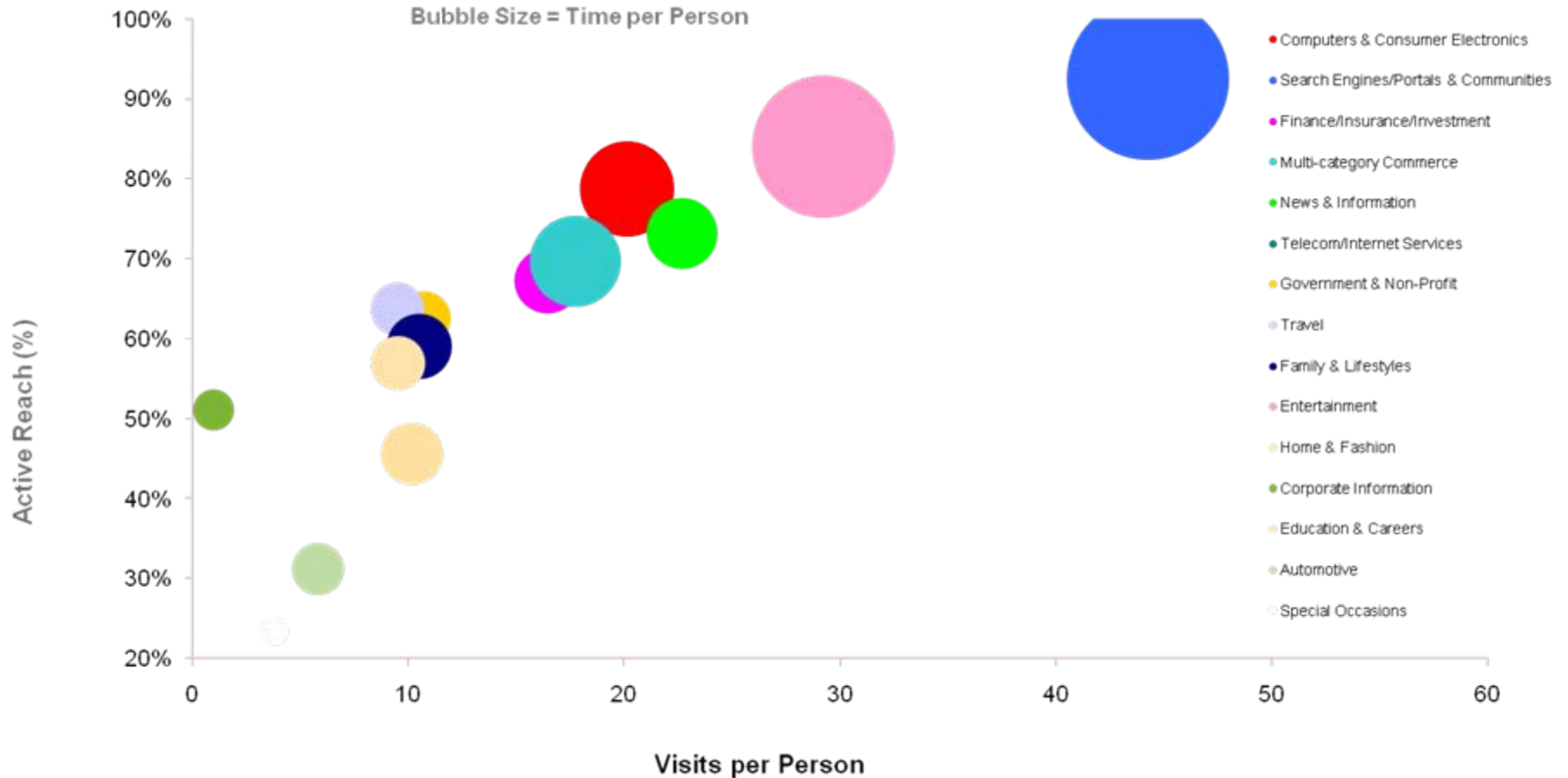
Major categories snapshot

Name	Unique Audience (000)	Active Reach (%)	Total Sessions (000)	Sessions Per Person	Total Minutes (000)	Time Per Person (hh:mm:ss)	Total Page Views (000)
Search Engines/Portals & Communities	15128	92.47	669601	44.26	7026847	7:44:30	14097599
Entertainment	13741	84	401512	29.22	4903815	5:56:52	7886561
Telecom/Internet Services	13380	81.79	387298	28.95	2369046	2:57:03	2848236
Computers & Consumer Electronics	12877	78.71	259355	20.14	2030907	2:37:43	1051367
News & Information	11966	73.14	271483	22.69	1078428	1:30:08	1461421
Multi-category Commerce	11401	69.69	202104	17.73	1670160	2:26:30	3533797
Finance/Insurance/Investment	10995	67.21	181101	16.47	846669	1:17:00	1944714
Travel	10418	63.68	99197	9.52	529350	0:50:49	901818
Government & Non-Profit	10233	62.55	109960	10.75	504314	0:49:17	899653
Family & Lifestyles	9656	59.03	101354	10.5	740349	1:16:40	1424333
Home & Fashion	9317	56.95	89008	9.55	488053	0:52:23	937536
Corporate Information	8352	51.05	57136	6.84	251133	0:30:04	447636
Education & Careers	7458	45.59	75933	10.18	497071	1:06:39	920438
Automotive	5112	31.25	29723	5.81	244073	0:47:45	551955
Special Occasions	3823	23.37	14569	3.81	51646	0:13:31	106837

Source: Nielsen Online Ratings October 2011

Categories – Visits per person by stickiness

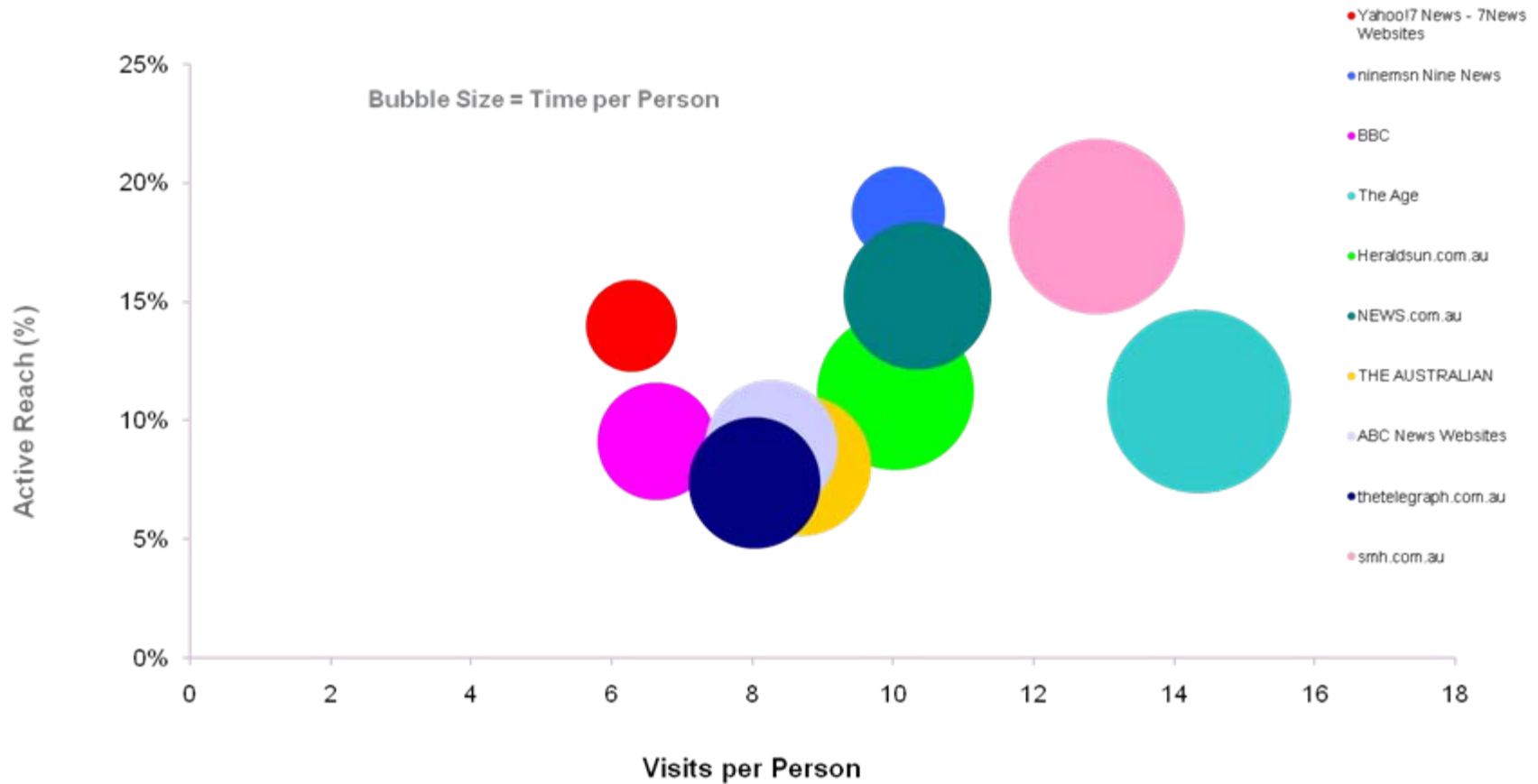
“Search and social media dominates the Internet landscape in Australia”



Source: Nielsen Online Ratings October 2011

Current Events & Global News – stickiness

“ninemsn Nine News leads the category in reach although smh.com.au has higher visits per person and time per person”



Source: Nielsen Online Ratings October 2011

Thank you

For further details, please contact your
Nielsen representative

The Nielsen logo is contained within a white circular shape. It features the word "nielsen" in a lowercase, sans-serif font. The letters "n", "i", and "e" are in a dark blue color, while the letters "l", "s", "e", and "n" are in a dark grey color. Below the word "nielsen" is a horizontal line of seven small, dark grey dots.

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