Australian Online Landscape Review

April 2012

State of the Online Landscape – April 2012

Snapshots of the Australian Online Consumer

In this latest release of our Australian Online Landscape Review, we present the latest unique audience trends; including market statistics, gender demographics, the top performing major categories, brands and sectors.

We also include a Category Spotlight on the Member Communities Category which has seen a 12% increase in audience over the last 12 months and in April attracted a Unique Audience of 11.9 million Australians.

The release last week of the Australian Multi-Screen report (covering Quarter 1, 2012) shows people continue to take advantage of multi-screen options to watch video - whether via conventional television sets, on desktop or laptop computers, or by using newer technologies such as smartphones and tablets.

We also review the just released Report 'Nielsen Global Online Consumers and Multi-Screen Media: Today and Tomorrow' which provides a global perspective of Online Consumers in 56 countries. The Report looks at their multi-screen media usage, device ownership and purchase intentions, Internet access points, and how they see mobile technology's role in the future…

Matt Bruce – Head of Media Practice Group, Nielsen

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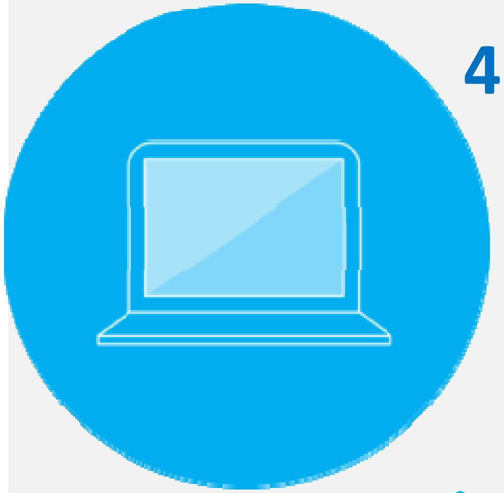
Source: Nielsen Online Ratings April 2012

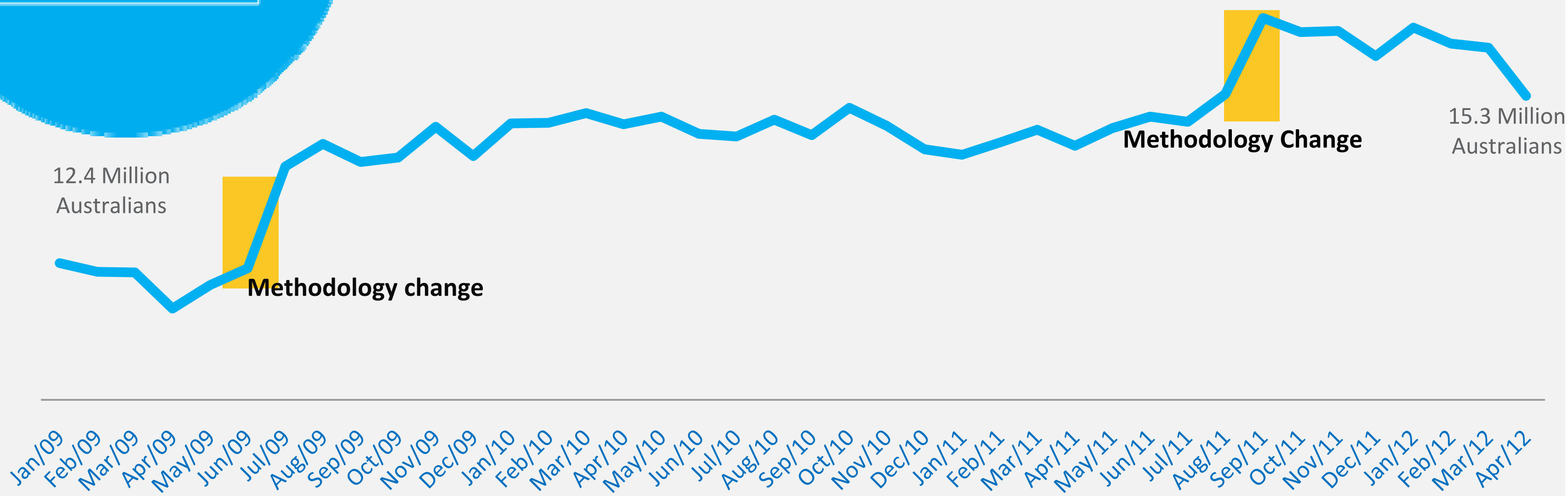
Key Online Statistics – April 2012

15.3 Million Australians Online – Down 5.1%

41 Billion Page Views – Down 2%

27 Billion Minutes Spent – Steady





An overall audience decline recorded for April due to both the Easter and School Holidays falling during this month

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Source: Nielsen Online Ratings April 2012

Gender Breakdown – April 2012

7,448,000	Number of Online Australians	7,809,000
2,996	Average pages viewed per month	2,681
81	Number of Sessions per month	76
82:00	Average PC time per month (HH:MM)	73:05

Source: Nielsen Online Ratings April 2012

Demographic Breakdown – April 2012

2-17

% of Online Aus	10.1%
Average PV's	848
Average PC time	16:18

18-24

% of Online Aus	12.9%
Average PV's	2,231
Average PC time	48:46

25-34

% of Online Aus	17.5%
Average PV's	3,501
Average PC time	93:21

35-49

% of Online Aus	27.4%
Average PV's	3,669
Average PC time	96:45

50+

% of Online Aus	32%
Average PV's	2,545
Average PC time	83:00

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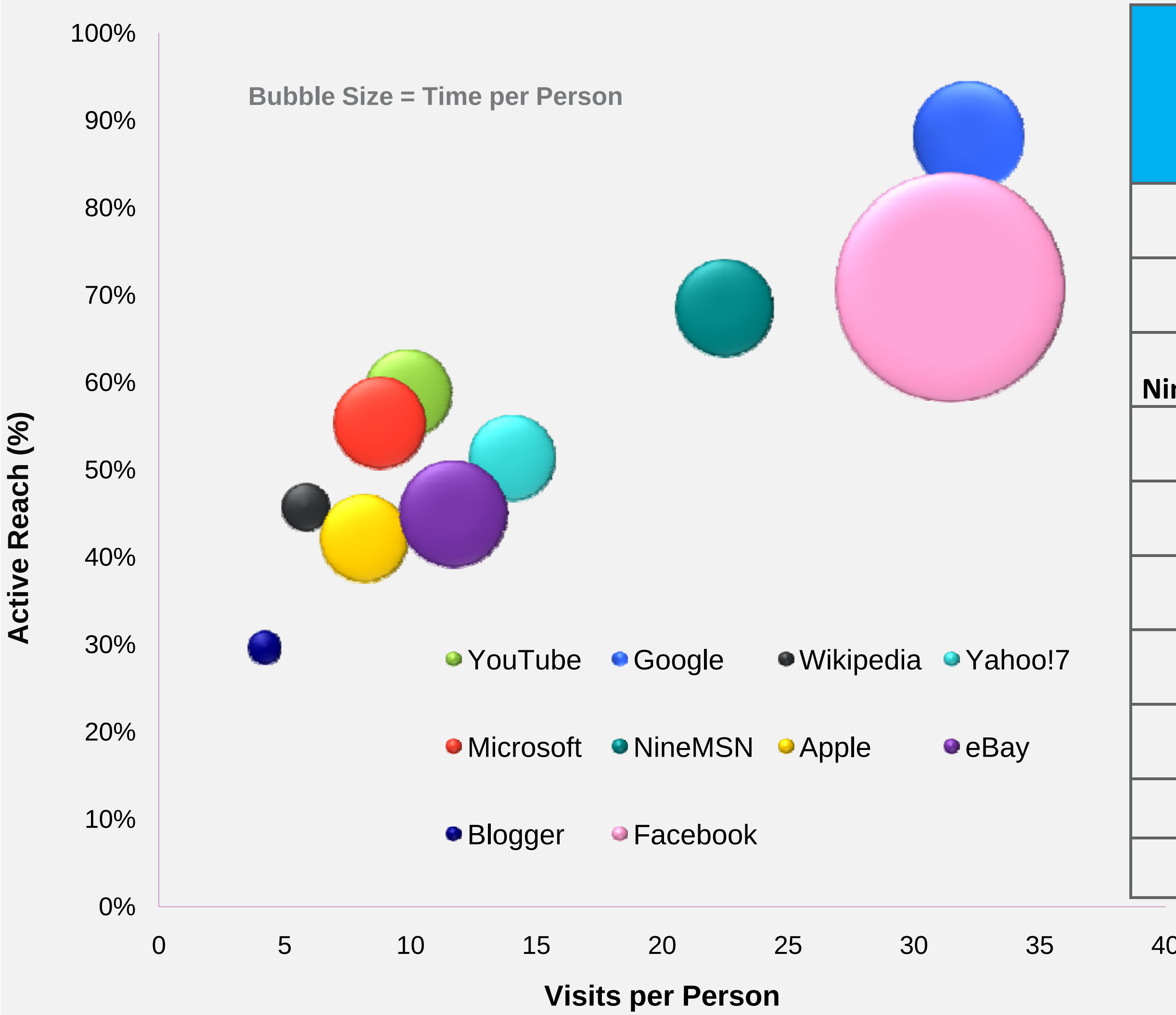
Source: Nielsen Online Ratings April 2012

Top 10 Brands – April 2012

Brands	Unique Audience (000) Mar 12	Page Views (000's)	Average Time Spent (HH:MM)	Audience Change Month on Month	Rank (Feb 12)
Google	13,425	3,282,641	01:59	-5%	1
Facebook	10,795	8,494,555	08:31	-2%	2
NineMSN/MSN	10,439	1,400,994	01:33	-2%	3
YouTube	8,946	840,359	01:14	-4%	4
Microsoft	8,425	45,551	01:21	-1%	5
Yahoo!7	7,816	869,708	01:11	-3%	6
Wikipedia	6,947	164,681	00:21	-4%	7
eBay	6,846	1,577,852	01:51	-1%	8
Apple	6,409	70,239	01:14	-6%	9
Blogger	4,519	60,891	00:11	3%	10

Source: Nielsen Online Ratings April 2012

Top 10 Brands – Stickiness – April 2012



Brands	Visits Per Person	Active Reach	Time Per Person
Google	32.22	88%	1:58:35
Facebook	31.46	71%	8:31:14
NineMSN/MSN	22.47	68%	1:32:52
YouTube	9.91	59%	1:14:17
Microsoft	8.79	55%	1:20:45
Yahoo!7	14.04	51%	1:10:32
Wikipedia	5.87	46%	0:21:25
eBay	11.73	45%	1:50:59
Apple	8.18	42%	1:14:09
Blogger	4.21	30%	0:10:39

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

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Source: Nielsen Online Ratings April 2012

Top 10 Categories – April 2012

Major categories	Unique Audience (000)	Total Sessions (000)	Sessions Per Person	Total Minutes (000)	Time Per Person (hh:mm:ss)	Total Page Views (000)
Search Engines/Portals & Communities	14,222	678,270	47.69	7,600,269	8:54:25	12,726,138
Entertainment	13,031	412,008	31.62	4,722,913	6:02:25	6,162,888
Telecom/Internet Services	12,624	373,625	29.60	2,448,395	3:13:57	3,182,572
Computers & Consumer Electronics	12,277	263,340	21.45	2,139,691	2:54:17	1,033,236
News & Information	11,436	273,461	23.91	1,191,187	1:44:10	1,565,517
Multi-category Commerce	11,025	198,734	18.03	1,536,149	2:19:20	3,095,261
Finance/Insurance/Investment	10,532	173,188	16.44	780,981	1:14:09	1,675,629
Travel	10,079	102,510	10.17	570,503	0:56:36	920,180
Government & Non-Profit	9,844	106,597	10.83	468,899	0:47:38	794,877
Family & Lifestyles	9,109	99,776	10.95	696,055	1:16:25	1,335,309

Source: Nielsen Online Ratings April 2012

Category Spotlight – Member Communities

The Member Communities Category is mostly made up of various social media networks

Category has seen a 12% increase in audience the last 12 months

Blogger is currently ranked second in the category, reaching an audience of 4.5 million

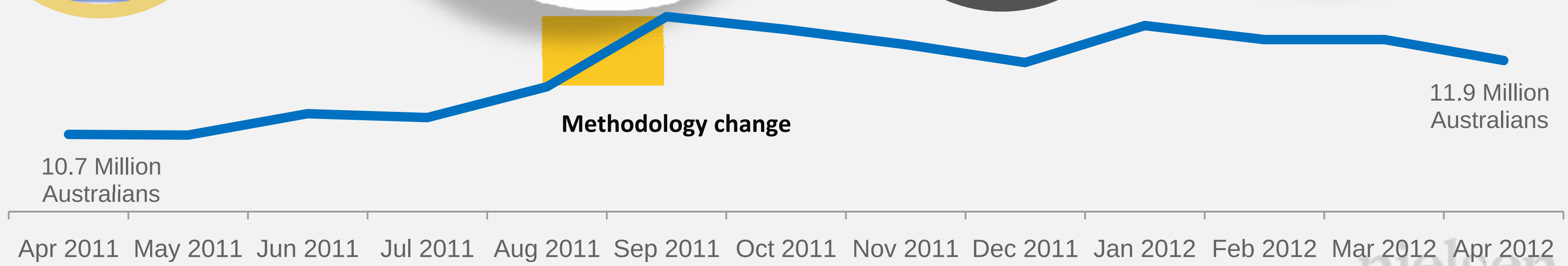
It is followed by Wordpress, Reaching 2.3 million, Twitter, Reaching 1.9 million & Linked In

Facebook leads the category, reaching 10.8 million Australians in April

They also lead the category in user engagement, with the Average visitor spending 8 hours and 31 minuets on the site a month

The Category is evenly Split on gender, and is one of the key areas to Reach audiences under 25

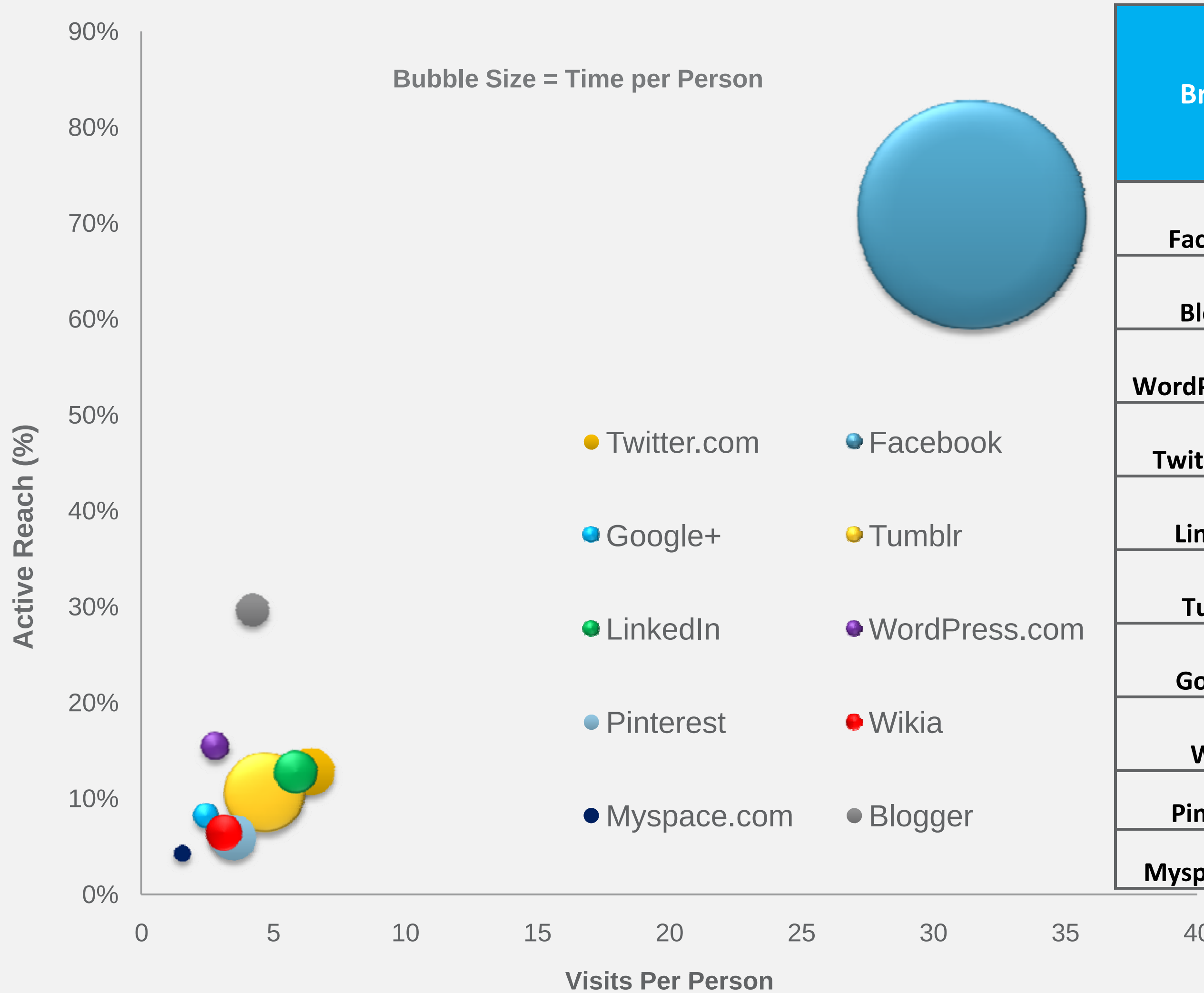
The majority of the audience has a household income above $75,000



An overall audience decline recorded for April was due to both the Easter and School Holidays falling during this month

Source: Nielsen Online Ratings April 2012

Member Communities – Stickiness – April 2012

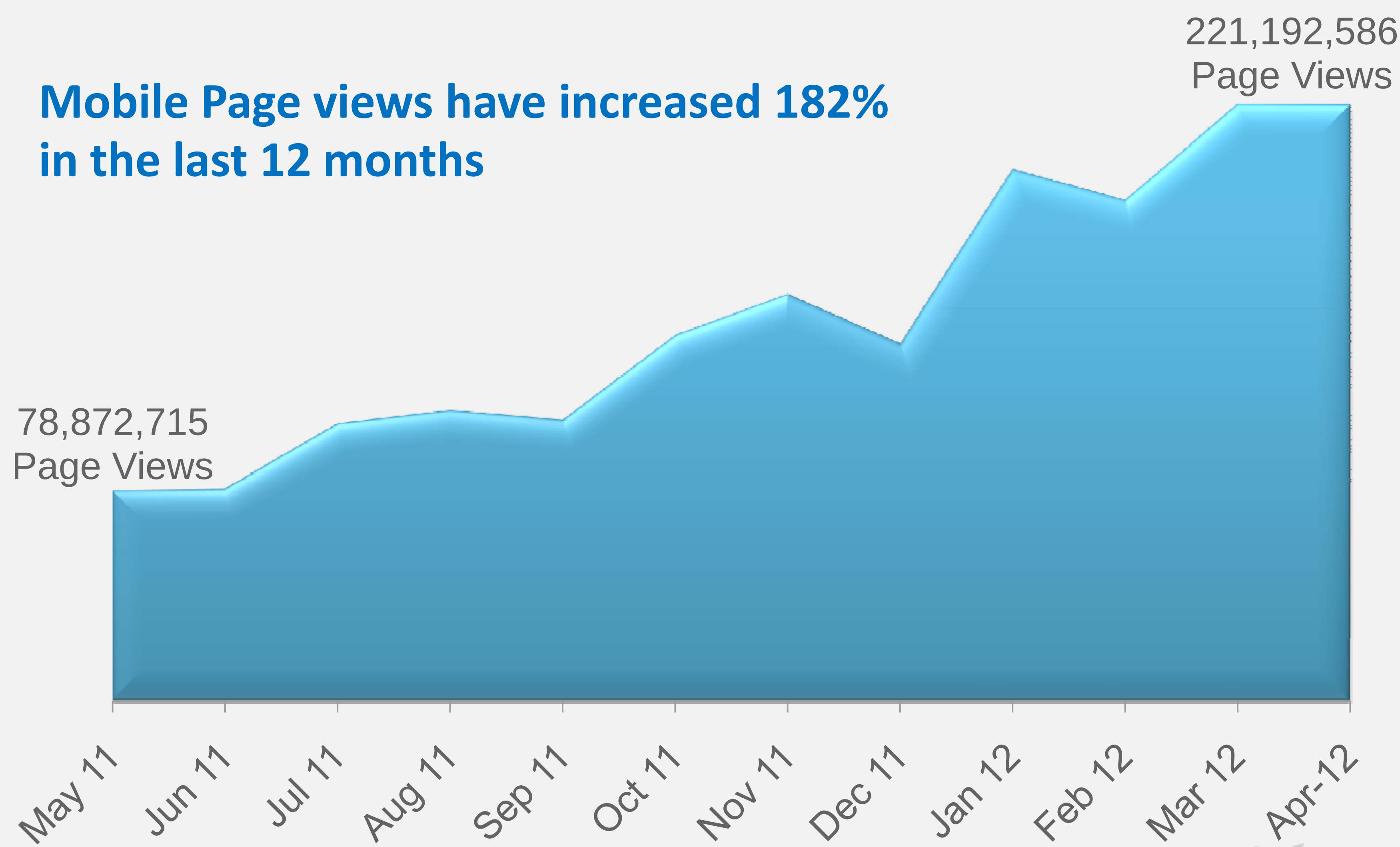


Brands	Visits Per Person	Active Reach	Time Per Person
Facebook	31.46	71%	8:31:14
Blogger	4.21	30%	0:10:39
WordPress.com	2.78	15%	0:07:31
Twitter.com	6.41	13%	0:21:11
LinkedIn	5.85	13%	0:17:31
Tumblr	4.67	11%	1:01:51
Google+	2.46	8%	0:06:09
Wikia	3.13	6%	0:12:06
Pinterest	3.47	6%	0:20:14
Myspace.com	1.52	4%	0:02:46

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

Source: Nielsen Online Ratings April 2012

Mobile Page Views – April 2012



Source: Nielsen Online Traffic (Mobile Market Intelligence – April 2012)

Australian Multi-Screen Report - Q1 2012

trends in video viewership beyond conventional television sets

The release of the Australian Multi-Screen report (covering Quarter 1, 2012) shows people continue to take advantage of multiple- screen options to watch video - whether via conventional television sets, on desktop or laptop computers, or by using newer technologies such as smartphones and tablets.

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Australian Multi-Screen Report - Q1 2012

REPORT HIGHLIGHTS

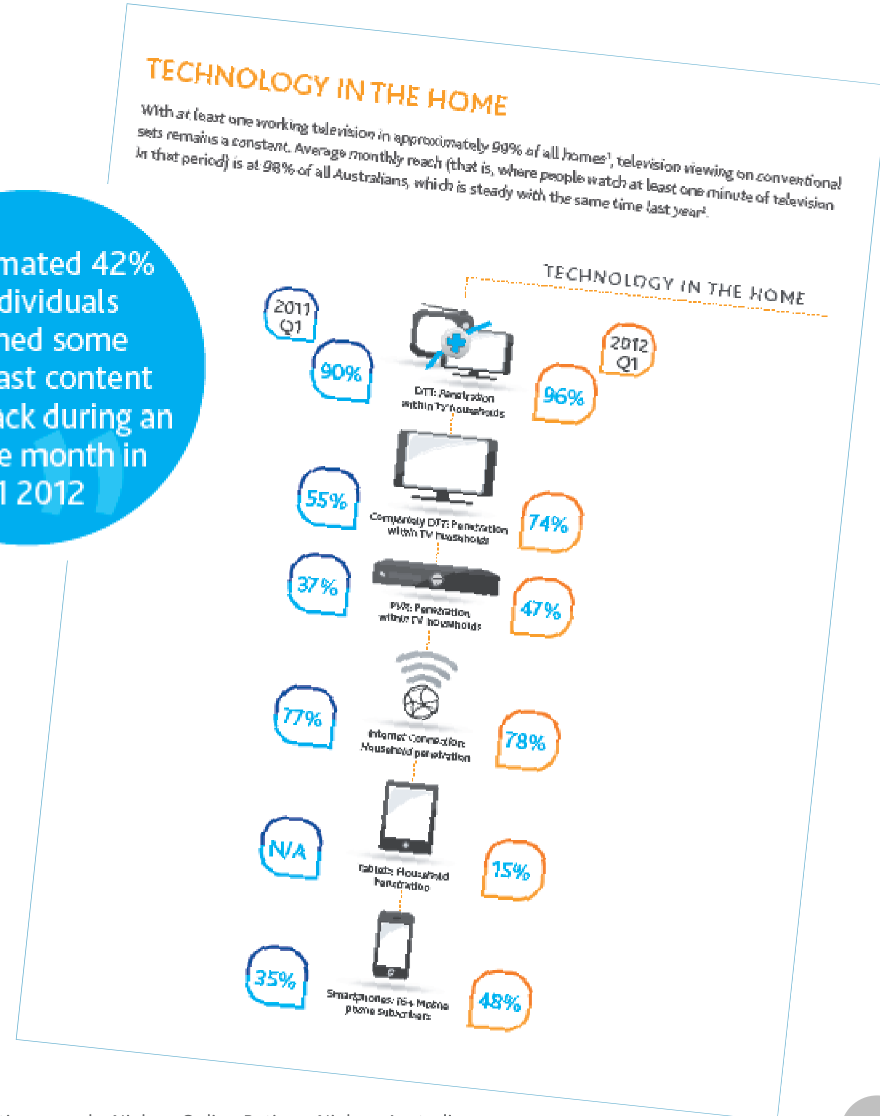
The percentage of Australian television homes capable of receiving digital terrestrial television (DTT) continues to grow ever closer to 100% as the 2013 deadline for analogue switch-off approaches.

The number of homes that have completely converted to DTT on all television sets was 74% in Q1 2012. This is an average increase of almost 5 percentage points per quarter since Q1 last year.

Over the past 12 months, the percentage of homes with personal video recorders (PVRs) has grown from 37% to 47%, with their functionality and convenience making them increasingly desirable.

Access to digital television and personal video recorders for free to air broadcasts and subscription television services continues to drive traditional video viewing.

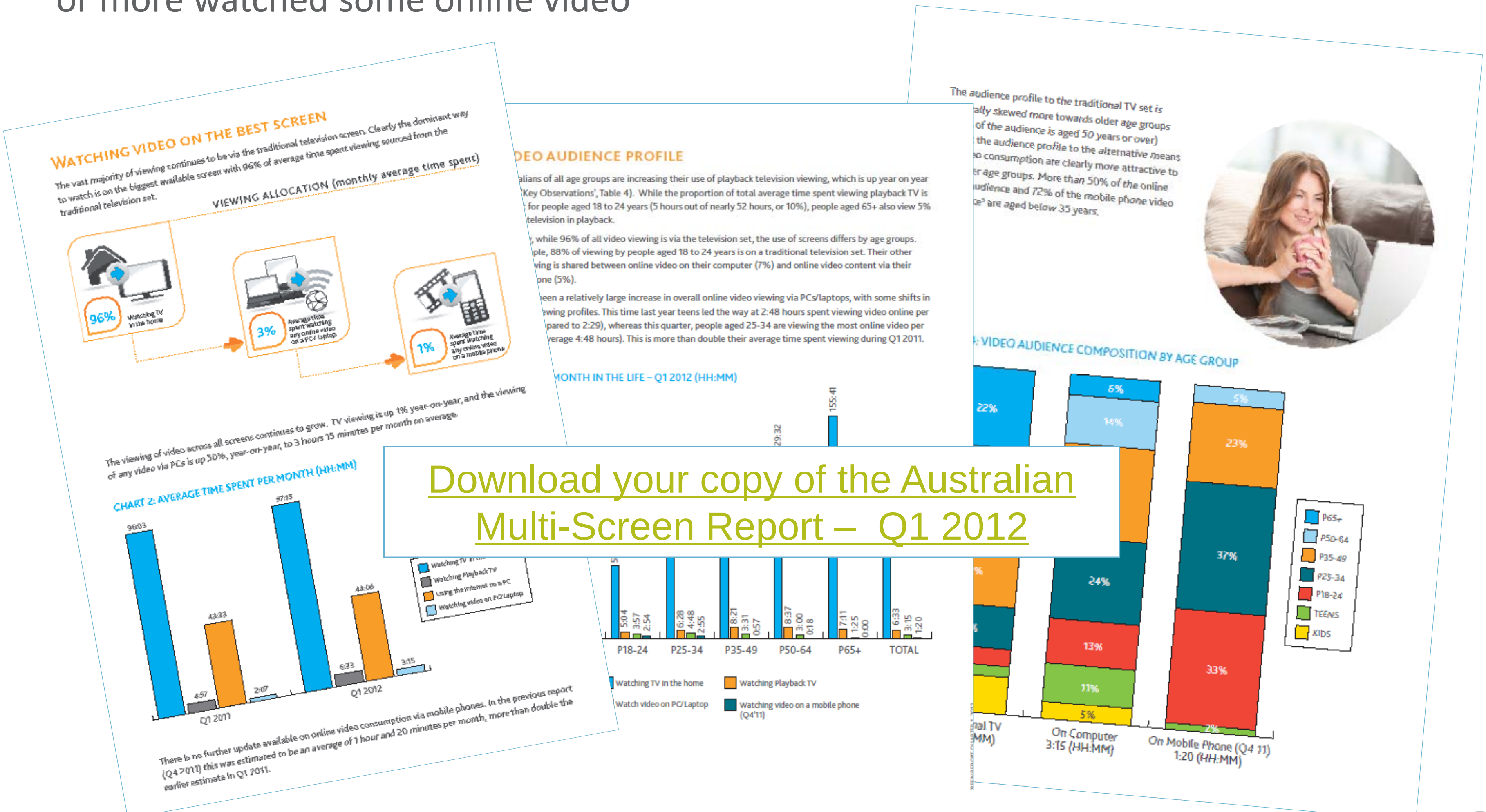
An estimated 42% of individuals watched some broadcast content in playback during an average month in Q1 2012



This report combines data from the OzTAM and Regional TAM television ratings panels, Nielsen Online Ratings, Nielsen Australian Online Consumer Report and Nielsen Consumer & Media View database to provide the national multi-screen estimates.

Australian Multi-Screen Report - Q1 2012

'approximately 45% of individuals aged 2 years or more watched some online video'



[Download your copy of the Australian Multi-Screen Report – Q1 2012]

A Nielsen Global Perspective of Online Consumers and Multi-Screen Media: Today and Tomorrow

To understand how consumers around the world are responding to this fragmented media environment, Nielsen surveyed more than 28,000 Internet respondents in 56 countries online consumers on their multi-screen media usage, device ownership and purchase intentions, Internet access points, and how they see mobile technology's role in the future…

Get your copy of the Nielsen Global Perspective on Online Consumers Today and Tomorrow...

While the in-home TV and computer are still the most popular devices to watch video content, usage and growth in online and mobile technologies is making a sustained impact. Three-quarters (74%) of global respondents report watching video via the Internet (on any device), up four points since 2010, and over half of global online consumers (56%) say they watch video on a mobile phone at least once a month and 28 percent at least once a day.

For more information and to download the report

Media enquiries, please contact:
warren.gillmer@nielsen.com