



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...

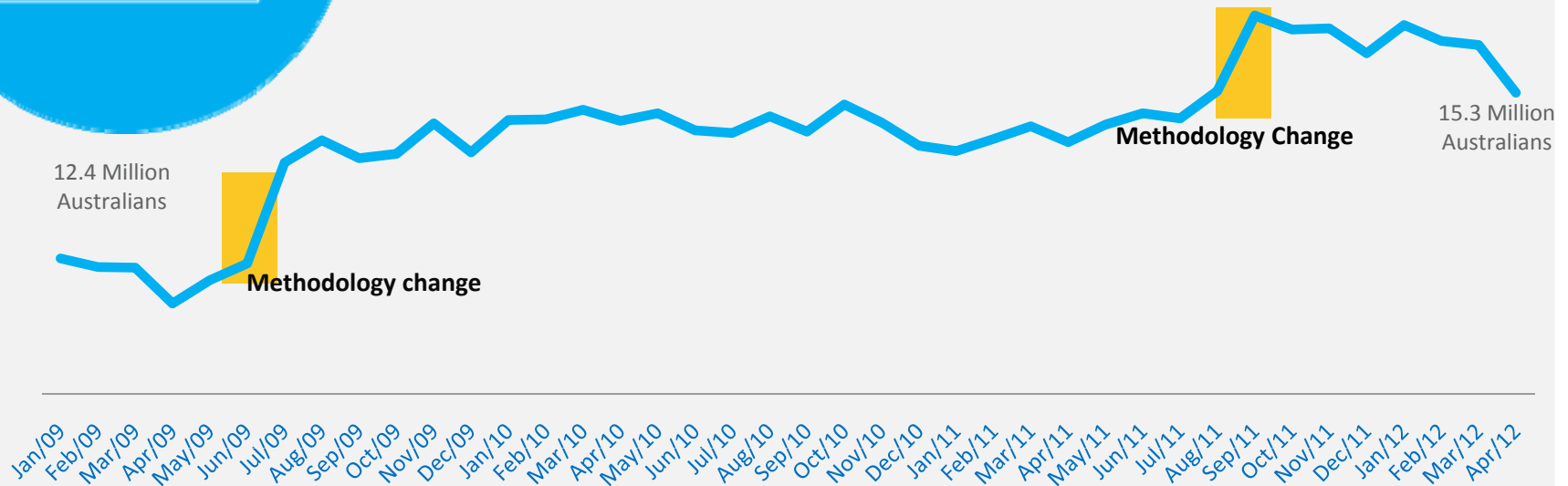
Matt Bruce – Head of Media Practice Group, Nielsen

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

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+

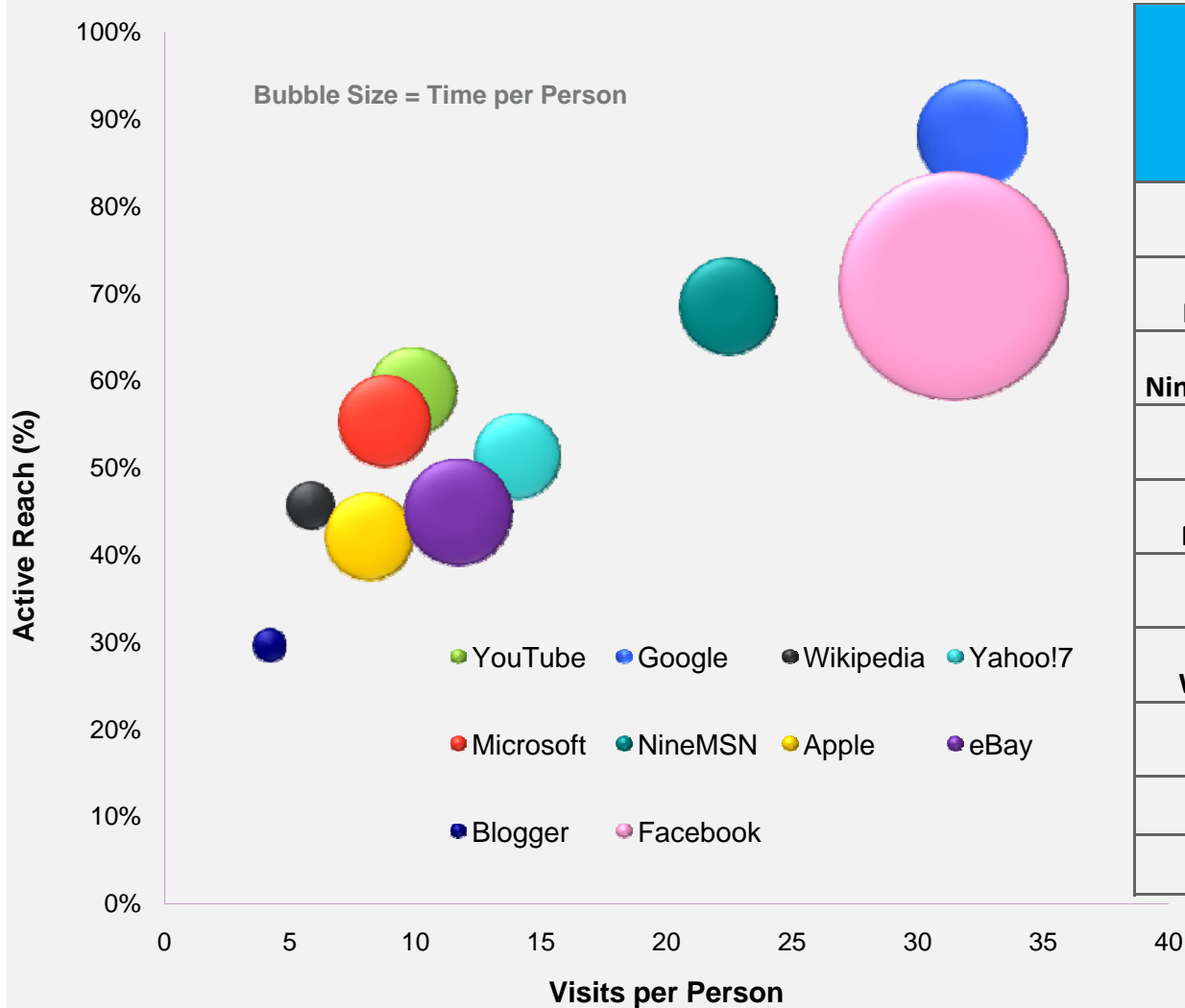
% of Online Aus **32%**
Average PV's **2,545**
Average PC time **83:00**

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



Top 10 Brands – Stickiness – April 2012



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

Top 10 Categories – April 2012

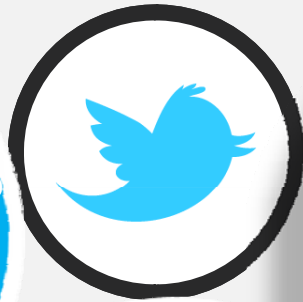
Major categories	Unique Audience (000)	Total Sessions (000)	Sessions Per Person	Total Minutes (000)	Time Per Person (hh:mm:ss)	Total Page Views (000)
Search Engines/Portals & Communities	14,222	678,270	47.69	7,600,269	8:54:25	12,726,138
Entertainment	13,031	412,008	31.62	4,722,913	6:02:25	6,162,888
Telecom/Internet 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



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



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

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 minutes on the site a month



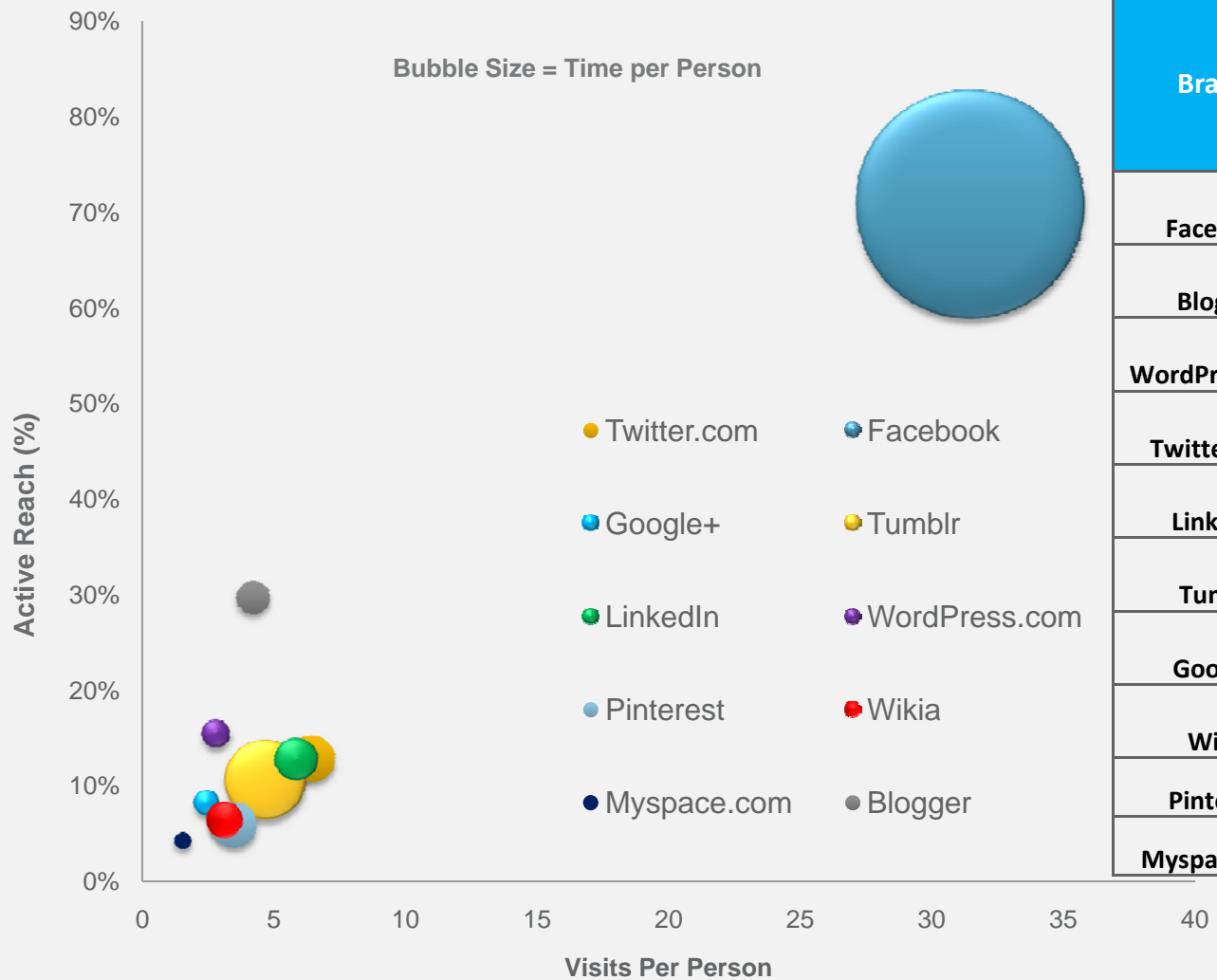
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An overall audience decline recorded for April was due to both the Easter and School Holidays falling during this month

Source: Nielsen Online Ratings April 2012

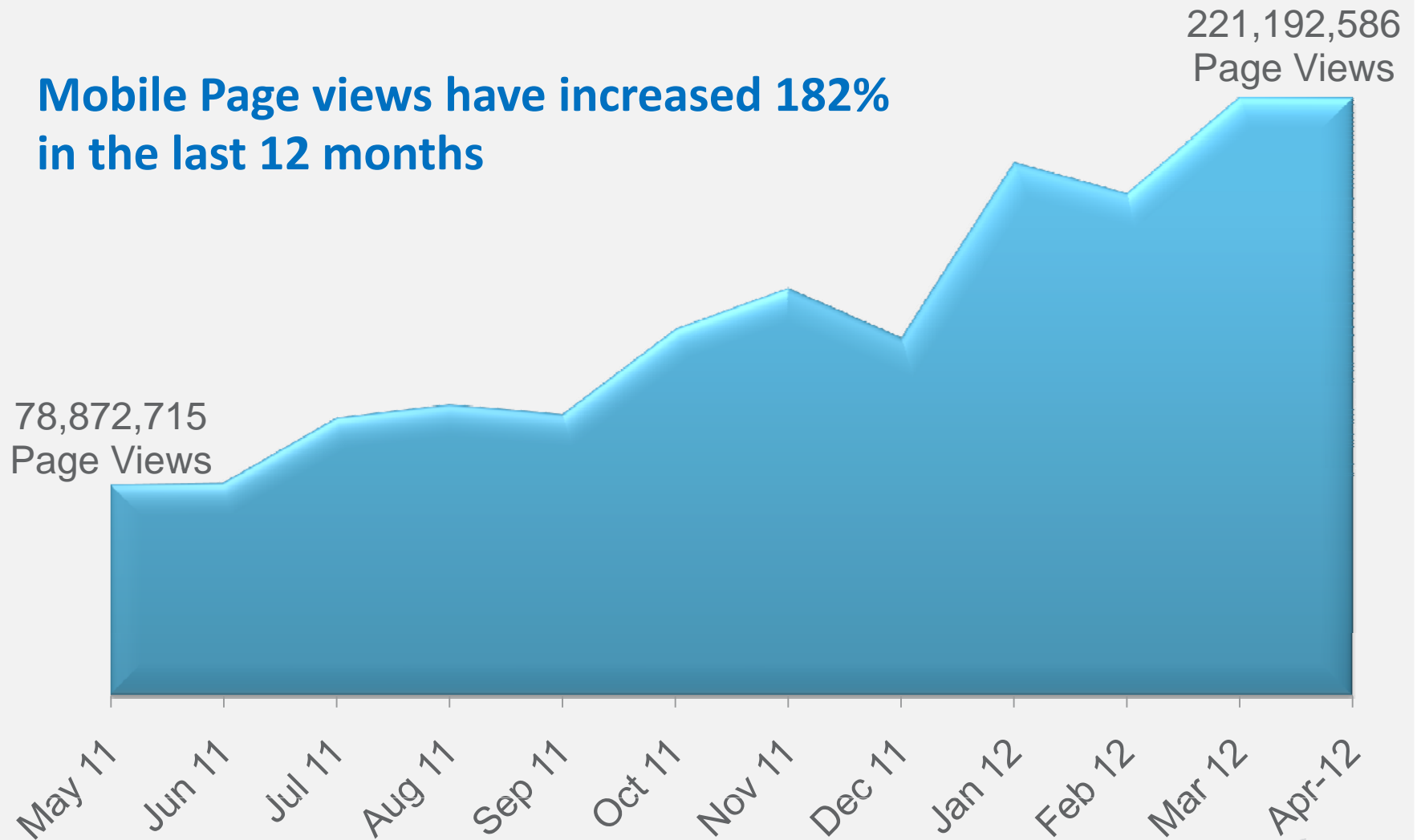
Member Communities – Stickiness – April 2012



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

Mobile Page Views – April 2012

**Mobile Page views have increased 182%
in the last 12 months**



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.



Australian Multi-Screen Report - Q1 2012

REPORT HIGHLIGHTS

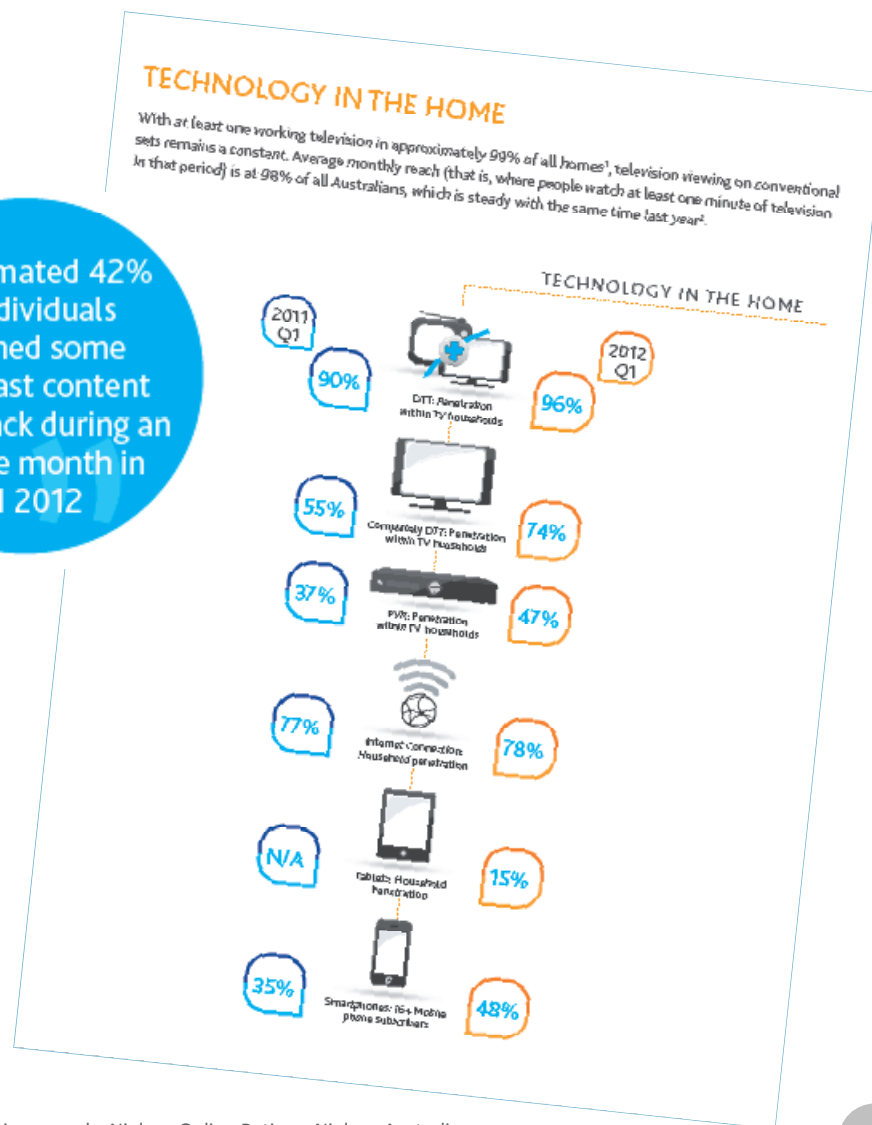
The percentage of Australian television homes capable of receiving digital terrestrial television (DTT) continues to grow ever closer to 100% as the 2013 deadline for analogue switch-off approaches.

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'

WATCHING VIDEO ON THE BEST SCREEN

The vast majority of viewing continues to be via the traditional television screen. Clearly the dominant way to watch is on the biggest available screen with 96% of average time spent viewing sourced from the traditional television set.

VIEWING ALLOCATION (monthly average time spent)

- 96% Watching TV in the home
- 3% Average time spent watching any online video on a PC/Laptop
- 1% Average time spent watching any online video on a mobile phone

The viewing of video across all screens continues to grow. TV viewing is up 1% year-on-year, and the viewing of any video via PCs is up 50%, year-on-year, to 3 hours 15 minutes per month on average.

CHART 2: AVERAGE TIME SPENT PER MONTH (HH:MM)

Age Group	Q1 2011 (HH:MM)	Q1 2012 (HH:MM)
P18-24	96:03	4:57
P25-34	43:33	2:07
P35-49	97:15	6:33
P50-64	43:04	3:15

There is no further update available on online video consumption via mobile phones. In the previous report (Q4 2011) this was estimated to be an average of 7 hour and 20 minutes per month, more than double the earlier estimate in Q1 2011.

VIDEO AUDIENCE PROFILE

Millions of all age groups are increasing their use of playback television viewing, which is up year on year (Key Observations, Table 4). While the proportion of total average time spent viewing playback TV is up for people aged 18 to 24 years (5 hours out of nearly 52 hours, or 10%), people aged 65+ also view 5% television in playback.

While 96% of all video viewing is via the television set, the use of screens differs by age groups. For example, 80% of viewing by people aged 18 to 24 years is on a traditional television set. Their other viewing is shared between online video on their computer (7%) and online video content via their mobile phone (5%).

There has been a relatively large increase in overall online video viewing via PCs/laptops, with some shifts in viewing profiles. This time last year teens led the way at 2:48 hours spent viewing video online per month (compared to 2:29), whereas this quarter, people aged 25-34 are viewing the most online video per month (4:48 hours). This is more than double their average time spent viewing during Q1 2011.

MONTH IN THE LIFE - Q1 2012 (HH:MM)

Age Group	Month in the Life (HH:MM)
P18-24	50:4
P25-34	35:7
P35-49	2:54
P50-64	6:28
P65+	4:48
TOTAL	2:55

- Watching TV in the home
- Watching Playback TV
- Watching video on PC/Laptop
- Watching video on a mobile phone (Q4'11)

The audience profile to the traditional TV set is still heavily skewed more towards older age groups (the audience is aged 50 years or over) while the audience profile to the alternative means of video consumption are clearly more attractive to younger age groups. More than 50% of the online video audience and 72% of the mobile phone video audience are aged below 35 years.

VIDEO AUDIENCE COMPOSITION BY AGE GROUP

Screen Type	Age Group	Percentage
Traditional TV (9MM)	P65+	22%
	P50-64	6%
	P25-49	14%
	P18-24	5%
	KIDS	53%
On Computer (3:15 (HH:MM))	P65+	2%
	P50-64	24%
	P25-49	13%
	P18-24	11%
	KIDS	5%
On Mobile Phone (Q4 '11) (1:20 (HH:MM))	P65+	2%
	P50-64	37%
	P25-49	23%
	P18-24	33%
	KIDS	2%

Australian Multi-Screen Report - Q1 2012 - Released May 2012

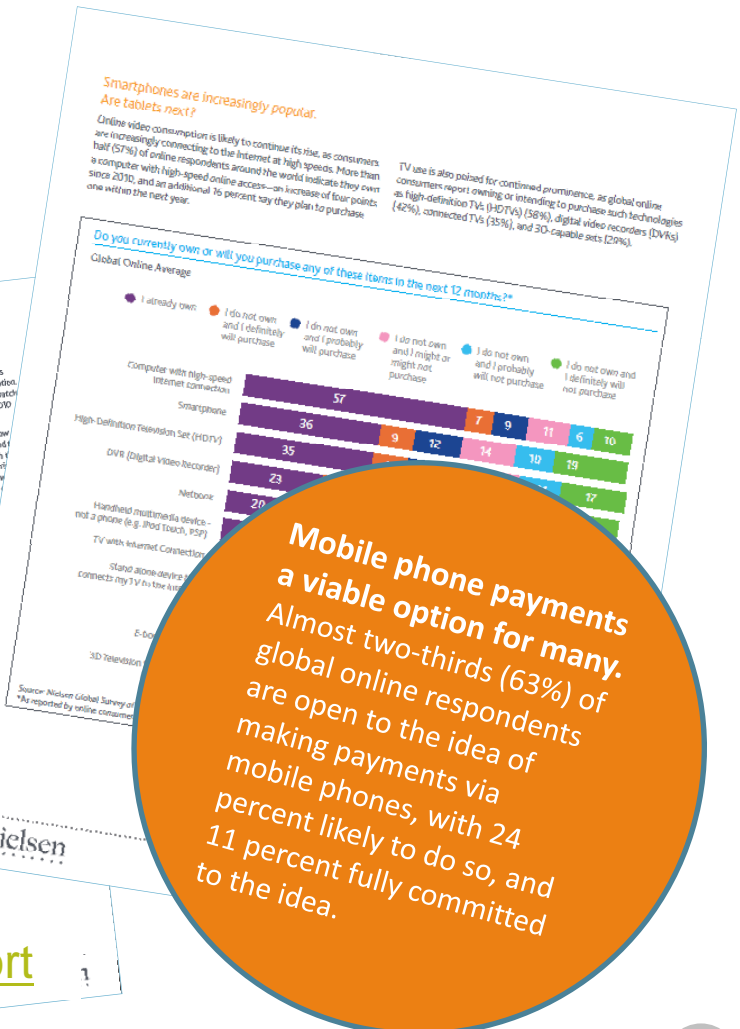
A Nielsen Global Perspective of Online Consumers and Multi-Screen Media: Today and Tomorrow

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.



Mobile phone payments a viable option for many. Almost two-thirds (63%) of global online respondents are open to the idea of making payments via mobile phones, with 24 percent likely to do so, and 11 percent fully committed to the idea.

For more information and to download the report

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The Nielsen logo is positioned in the bottom right corner of the slide. It consists of the word "nielsen" in a lowercase, blue, serif font, with a horizontal line of seven dots underneath it. The logo is contained within a white circular shape that appears to be rising from a green, wavy horizon line at the bottom of the slide.

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