



Australian Online Landscape Review

May 2012

State of the Online Landscape – May 2012



Snapshots of the Australian Online Consumer

In this latest release of our Australian Online Landscape Review of May 2012, we present the latest unique audience trends; including market statistics, gender demographics, the top performing major categories, brands and sectors.

Following the shorter month and seasonal holidays which impacted overall audience numbers in April, overall ratings saw a healthy 6% increase in Unique Audience numbers and a 10% increase to 27 billion minutes in overall minutes spent online. Our latest update on Nielsen Online Mobile Traffic for May, shows that Mobile Page Views over the past 13 months have increased 207% to over 240.6 million since May 2011.

We also include a Category Snapshot on The Voice Australia which has been a musical and social media phenomenon. From the social media conversations that Nielsen tracked, The Voice generated more than 250,000 mentions during its 10 week run, a phenomenal figure.

Matt Bruce – Head of Media Practice Group, Nielsen

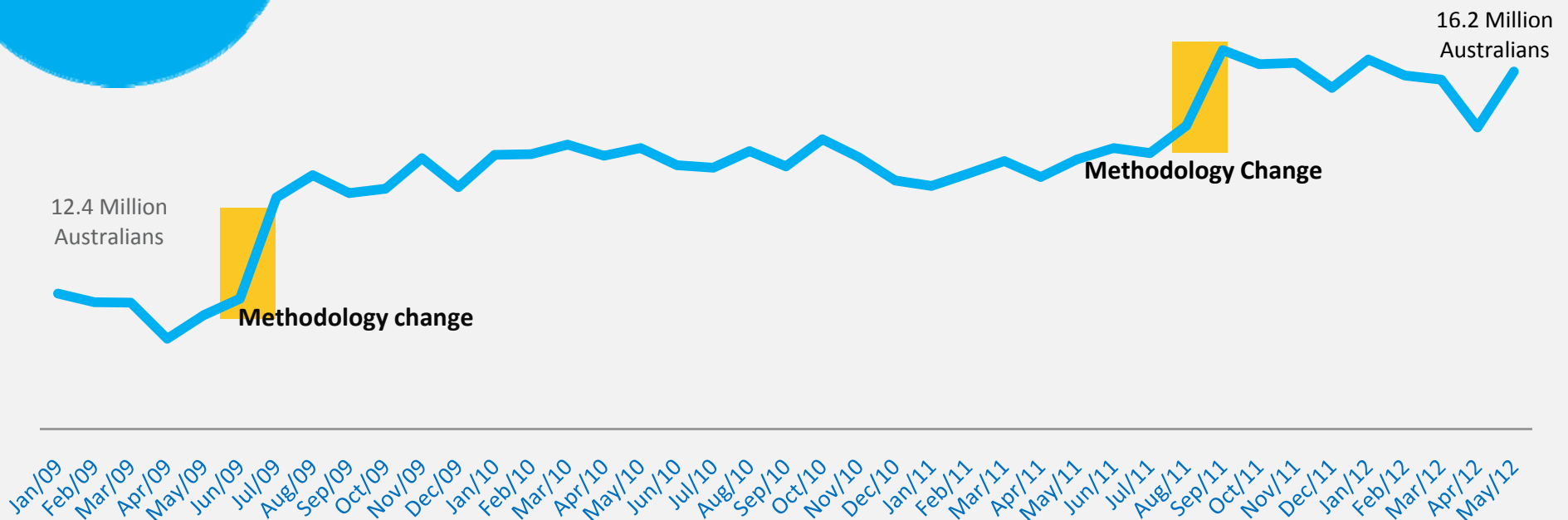


Key Online Statistics – May 2012

16.2 Million Australians Online – Up 6.4% on April

43 Billion Page Views – Up 6% on April

27 Billion Minutes Spent – Up 10% on April



Gender Breakdown – May 2012



8,218,000

Number of Online Australians



8,013,000

2,819

Average pages viewed per month

2,810

79

Number of Sessions per month

78

82:15

Average PC time per month (HH:MM)

79:03

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Demographic Breakdown – May 2012

2-17

% of Online Aus **7.49%**

Average PV's **1,273**

Average PC time **22:39**

18-24

% of Online Aus **12.3%**

Average PV's **2,486**

Average PC time **54:50**

25-34

% of Online Aus **18%**

Average PV's **3,728**

Average PC time **105:40**

35-49

% of Online Aus **28.5%**

Average PV's **3,218**

Average PC time **93:36**

50+

% of Online Aus **31.1%**

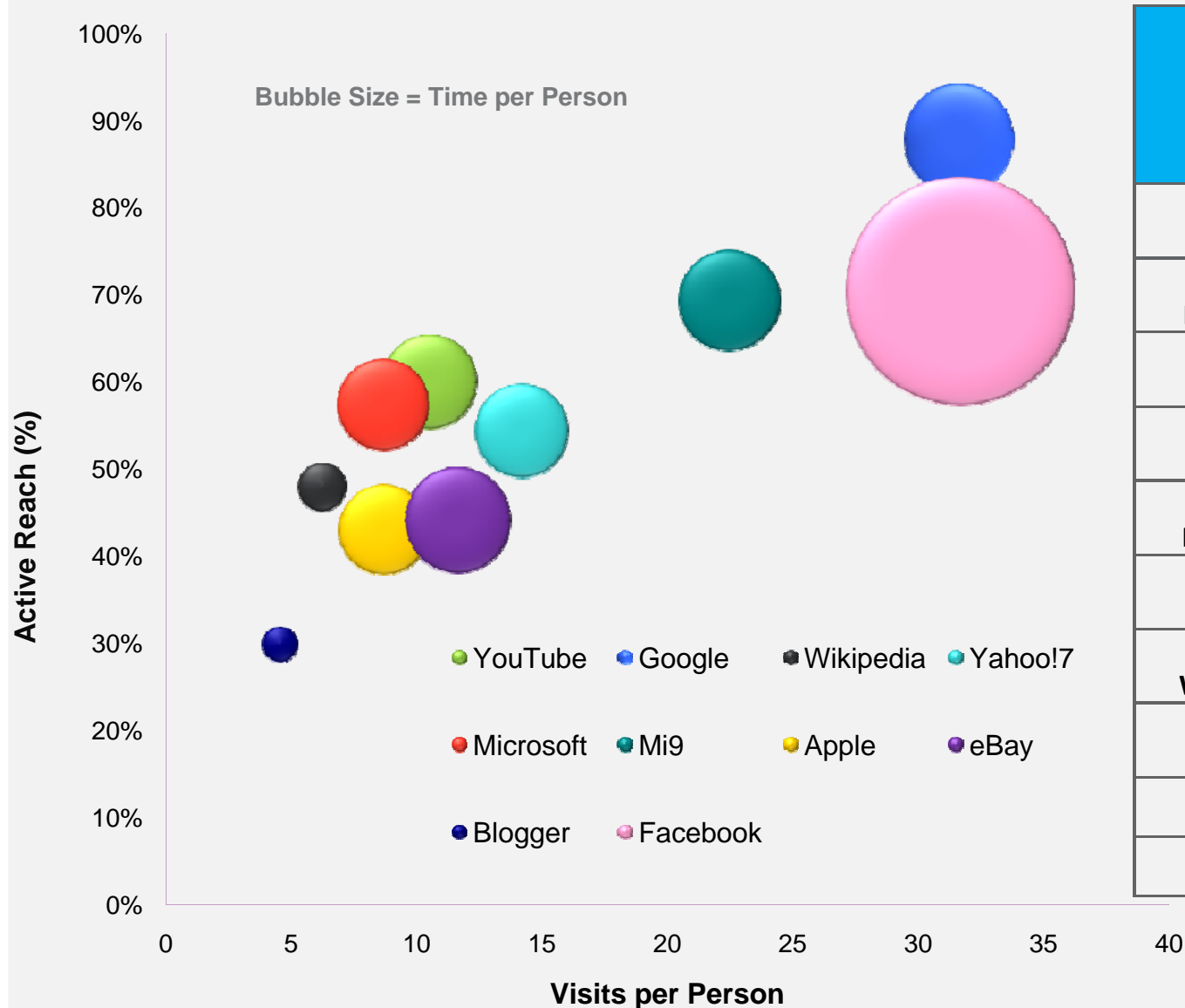
Average PV's **2,583**

Average PC time **84:03**

Top 10 Brands – May 2012

| Brands | Unique Audience (000) May 12 | Page Views (000's) | Average Time Spent (HH:MM) | Audience Change Month on Month | Rank (May 12) |
|-------------|---------------------------------|-----------------------|-------------------------------|-----------------------------------|---------------|
| Google | 14,254 | 3,314,908 | 1:54:59 | 6% | 1 |
| Facebook | 11,417 | 8,455,626 | 8:21:38 | 6% | 2 |
| NineMSN/MSN | 11,225 | 1,558,776 | 1:37:16 | 8% | 3 |
| YouTube | 9,720 | 1,014,004 | 1:25:59 | 9% | 4 |
| Microsoft | 9,293 | 47,200 | 1:20:41 | 10% | 5 |
| Yahoo!7 | 8,802 | 1,074,688 | 1:22:58 | 13% | 6 |
| Wikipedia | 7,775 | 200,215 | 0:21:21 | 12% | 7 |
| eBay | 7,150 | 1,527,657 | 1:45:33 | 4% | 8 |
| Apple | 6,976 | 72,397 | 1:16:14 | 9% | 9 |
| Blogger | 4,847 | 75,773 | 0:11:25 | 7% | 10 |

Top 10 Brands – Stickiness – May 2012



| Brands | Visits Per Person | Active Reach | Time Per Person |
|-----------|-------------------|--------------|-----------------|
| Google | 31.62 | 88% | 1:54:59 |
| Facebook | 31.71 | 70% | 8:21:38 |
| Mi9 | 22.48 | 69% | 1:37:16 |
| YouTube | 10.53 | 60% | 1:25:59 |
| Microsoft | 8.67 | 57% | 1:20:41 |
| Yahoo!7 | 14.21 | 54% | 1:22:58 |
| Wikipedia | 6.22 | 48% | 0:21:21 |
| eBay | 11.65 | 44% | 1:45:33 |
| Apple | 8.69 | 43% | 1:16:14 |
| Blogger | 4.54 | 30% | 0:11:25 |

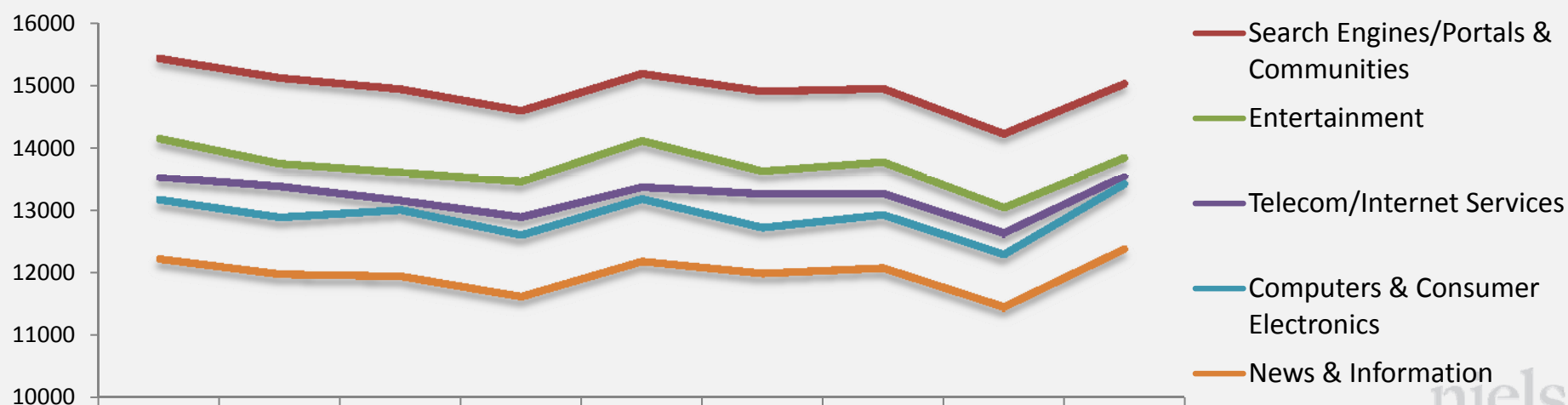
*Stickiness is a custom visualization derived from reach, time and visits – not a standalone metric

Top 10 Categories – May 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 | 15,034 | 712,243 | 47.38 | 8,063,119 | 8:56:19 | 13,043,469 |
| Entertainment | 13,838 | 447,095 | 32.31 | 5,431,921 | 6:32:32 | 6,773,877 |
| Telecom/Internet Services | 13,551 | 414,867 | 30.62 | 2,743,175 | 3:22:26 | 3,420,087 |
| Computers & Consumer Electronics | 13,420 | 293,143 | 21.84 | 2,434,612 | 3:01:25 | 1,081,809 |
| News & Information | 12,374 | 301,694 | 24.38 | 1,345,264 | 1:48:43 | 1,763,831 |
| Multi-category Commerce | 11,987 | 217,334 | 18.13 | 1,595,623 | 2:13:07 | 3,049,601 |
| Finance/Insurance/Investment | 11,582 | 192,187 | 16.59 | 892,769 | 1:17:05 | 1,853,329 |
| Travel | 10,938 | 109,639 | 10.02 | 597,390 | 0:54:37 | 974,897 |
| Government & Non-Profit | 10,697 | 118,634 | 11.09 | 570,298 | 0:53:19 | 987,669 |
| Home & Fashion | 10,136 | 102,965 | 10.16 | 568,952 | 0:56:08 | 1,024,394 |

Top 5 Categories Trends – September 2011 to May 2012

| Major categories | Sep 2011 | Oct 2011 | Nov 2011 | Dec 2011 | Jan 2012 | Feb 2012 | Mar 2012 | Apr 2012 | May 2012 |
|--------------------------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| Search Engines/Portals & Communities | 15,444 | 15,128 | 14,945 | 14,596 | 15,198 | 14,910 | 14,955 | 14,222 | 15,034 |
| Entertainment | 14,148 | 13,741 | 13,598 | 13,459 | 14,111 | 13,619 | 13,769 | 13,031 | 13,838 |
| Telecom/Internet Services | 13,534 | 13,380 | 13,150 | 12,880 | 13,368 | 13,260 | 13,265 | 12,624 | 13,551 |
| Computers & Consumer Electronics | 13,164 | 12,877 | 12,996 | 12,590 | 13,173 | 12,710 | 12,918 | 12,277 | 13,420 |
| News & Information | 12,213 | 11,966 | 11,933 | 11,604 | 12,173 | 11,978 | 12,066 | 11,436 | 12,374 |

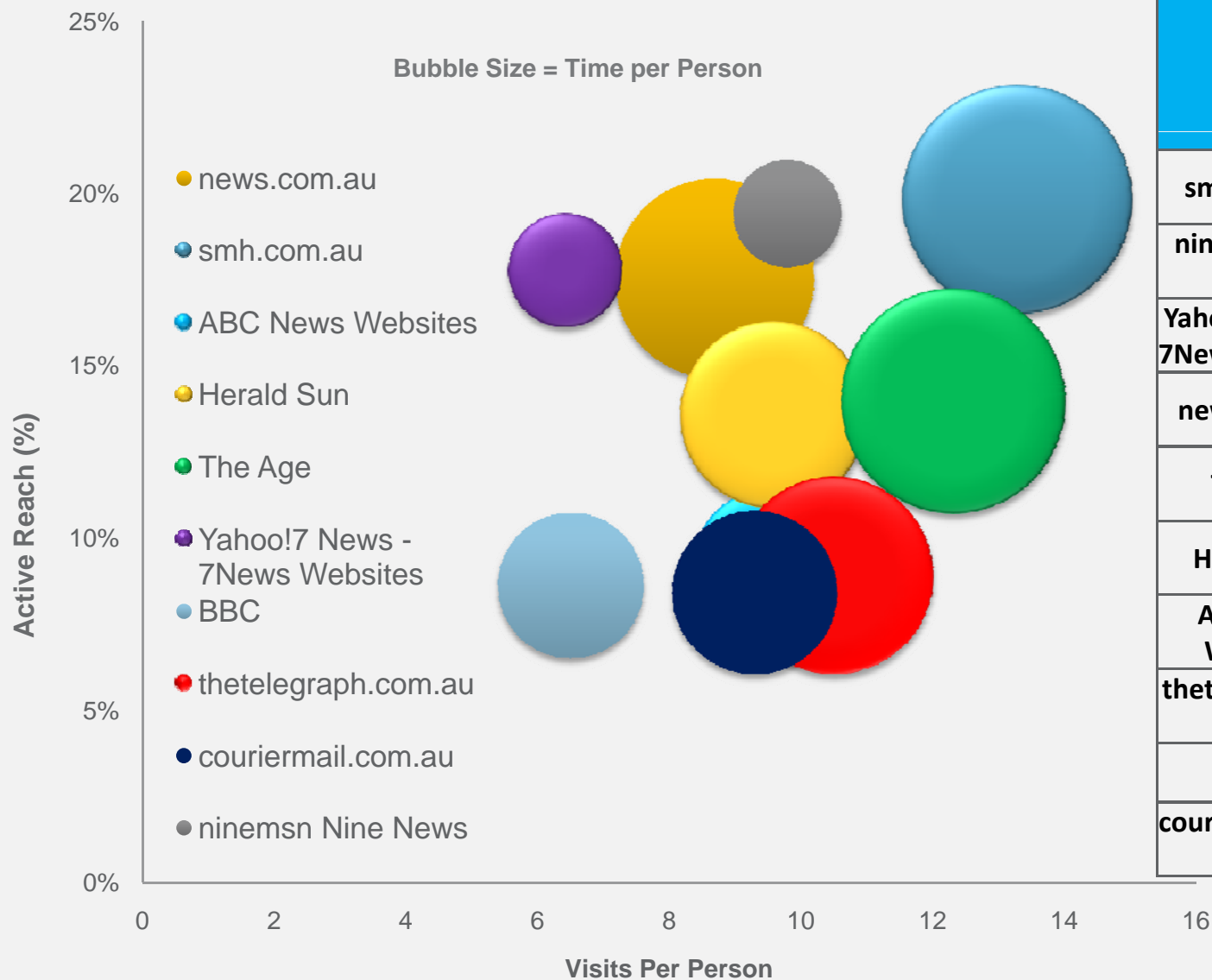


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Source: Nielsen Online Ratings May 2012

News & Information – Stickiness – May 2012



| Brands | Visits Per Person | Active Reach | Time Per Person |
|-------------------------------|-------------------|--------------|-----------------|
| smh.com.au | 13.29 | 20% | 0:48:06 |
| ninemsn Nine News | 9.78 | 19% | 0:10:39 |
| Yahoo!7 News - 7News Websites | 6.42 | 18% | 0:11:51 |
| news.com.au | 8.68 | 18% | 0:36:22 |
| The Age | 12.32 | 14% | 0:45:59 |
| Herald Sun | 9.59 | 14% | 0:31:44 |
| ABC News Websites | 9.54 | 9% | 0:21:58 |
| thetelegraph.com.au | 10.5 | 9% | 0:36:10 |
| BBC | 6.5 | 9% | 0:19:34 |
| couriermail.com.au | 9.29 | 8% | 0:24:58 |

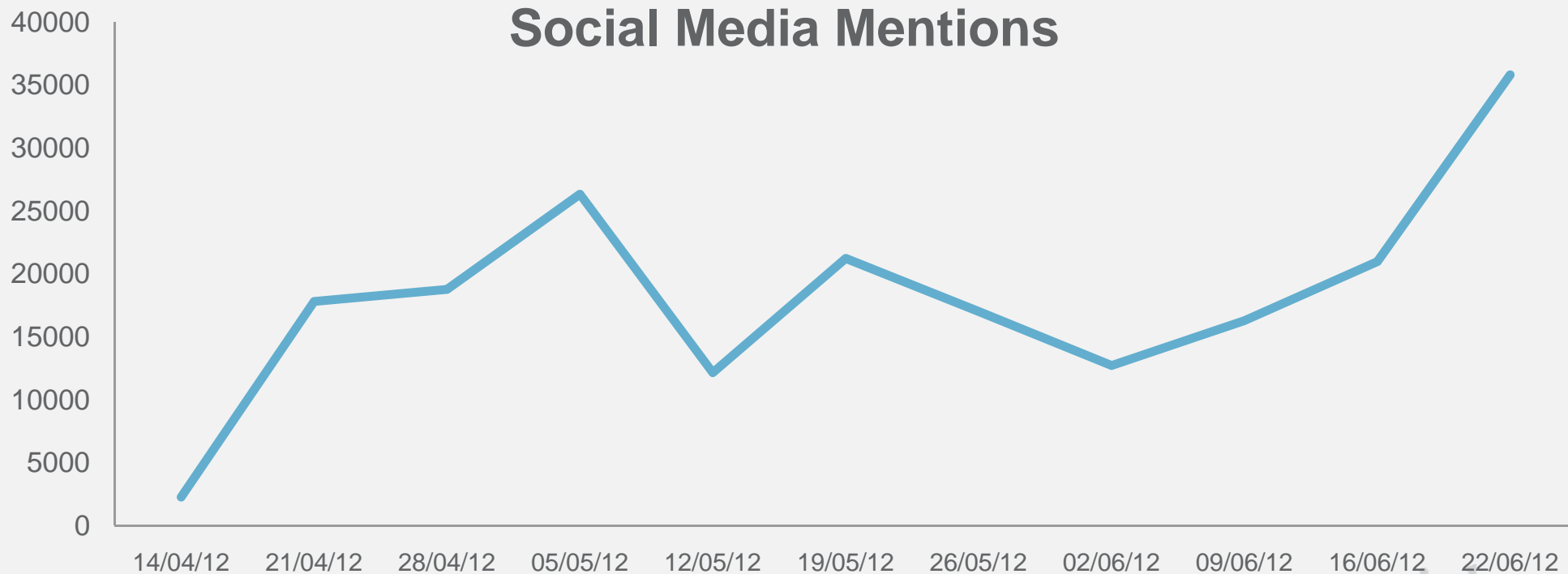
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Social Media Spotlight – The Voice



The Voice attracted a huge social media response during its 10 week run. Across the social media conversations tracked by Nielsen's My Buzz Metric solution, there were more than 250,000 comments relating to The Voice, building steadily across the show's run and peaking with the finale.

Social Media Mentions




Social Media Spotlight – The Voice



The Voice saw a diverse mixture of conversations around the judges, the contestants and the show generally with 21% of mentions being positive, 7% negative and 72% being neutral.

Positive

 **Chad Lazaro** @chadlaz 18 Jun
"She's the voice of a generation" - STFU SEAL. #TheVoiceAU
Expand

 **Bekka** @honeybunch1012
@delta_goodrem i think your so inspiring :) you make me smile :) :) your just absolutely incredible xxx :)

 **Dion Kingi** @dion_kingi 18 Jun
@TheVoiceAU Gr8 song by @JoelMadden & @Sarah_DeBono!
Expand

Negative

 **Erin Hendry** @ErinTheMusical 20 Jun
UGH shutup Seal. I'm tired of your ranting on @TheVoiceAU and @TheEllenShow
Expand

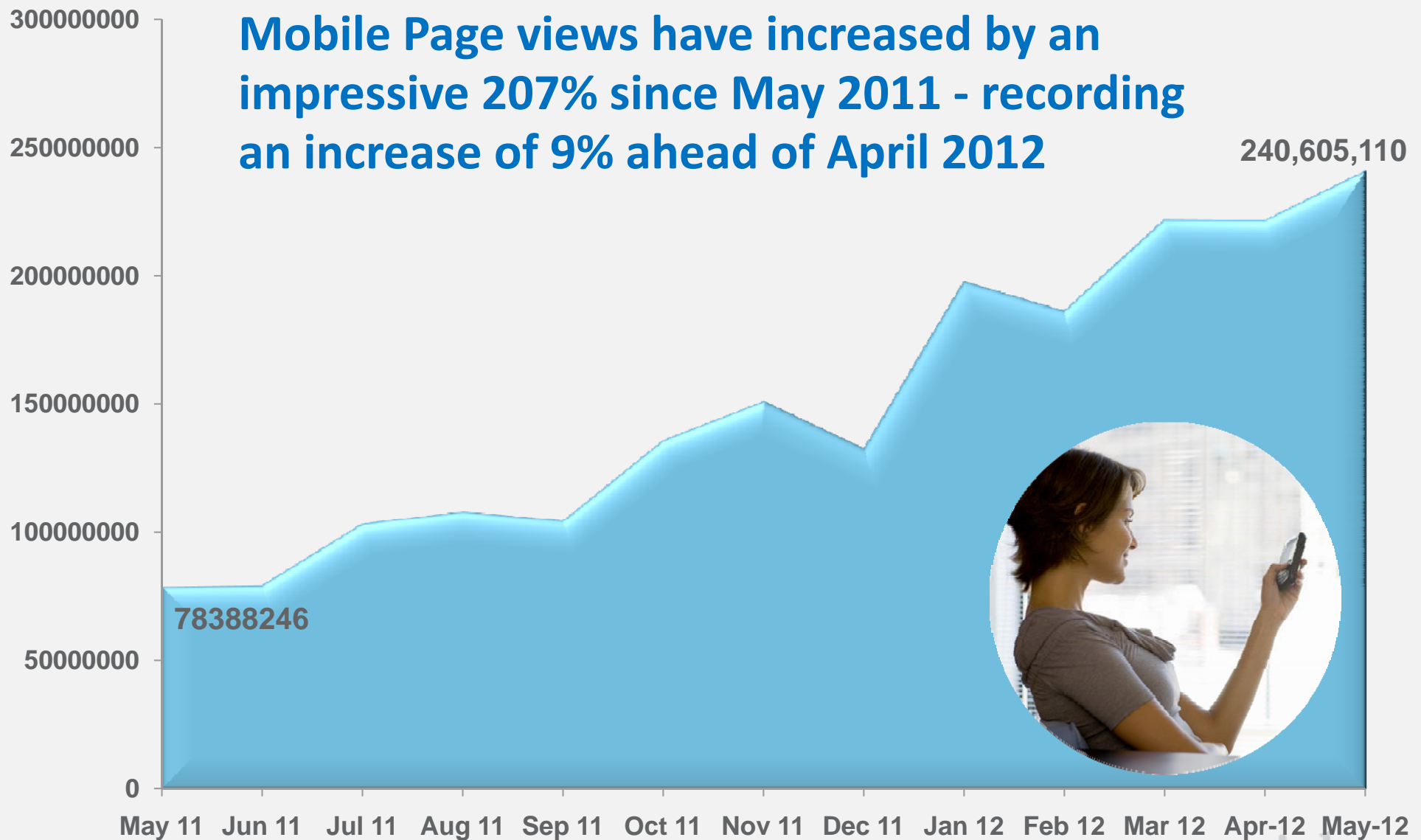
 **Gail Contreras** @GailLovesNiall 23 Jun
i hate joel madden ... hes such a creep and only picks girls .. HES NOT EVEN HOTT #ThevoiceAU
Expand

Badonavich of WA Sigh. Delta is slowly becoming like the next Lara Bingle. We are all sick of seeing & hearing about her & she will do anything for more media attention.
Posted at 2:38 PM June 19, 2012
Comment 31 of 45

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Mobile Page Views – May 2012

Mobile Page views have increased by an impressive 207% since May 2011 - recording an increase of 9% ahead of April 2012



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The Nielsen logo is located in the bottom right corner of the slide. It consists of the word "nielsen" in a lowercase, sans-serif font, with the "n" in blue and the rest in grey. Below the word are seven small grey dots. The logo is partially enclosed by a white circle that sits on a green wavy line representing a horizon.

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