



Australian Online Landscape Review

August 2012

State of the Online Landscape – August 2012

Snapshots of the Australian Online Consumer

In this latest release for August 2012, we present the latest unique audience trends; including market statistics, gender demographics, top performing major categories, brands and sectors. The overall unique audience numbers finished 1.7% ahead of July, with 42 billion page views and 29 billion minutes spent online.

The escalating use of mobile usage continued in August with Mobile Page views increasing to almost 300 million, an increase of 8% from July 2012 and 189% since Sep 2011

We spotlight the important Gen Y market segment of Australians 18 - 34 years of age, a 15 year group who in August represented nearly five million online consumers in August. Considered one of the most tech savvy market segments in Australia, Generation Y makes up 31% of our online population and they spend an average 86 hours online a month.

An interesting behavioural divide emerges when examining two distinct age segments of the Gen Y generation with the younger demographic, online 18-24 year olds, having much lower online engagement compared to their older cohorts across average page views, average sessions and time spent.

We also Snapshot the fast moving Multi-Category Commerce category, which is made up of the majority of online shopping sites. Covering Auction, Coupon, Mass Merchandiser and Shopping Directory sites which attract over 11 million Australians who spent an average two and a half hours on category sites and nearly 300 page views in August 2012.

Matt Bruce – Managing Director of Media, Nielsen



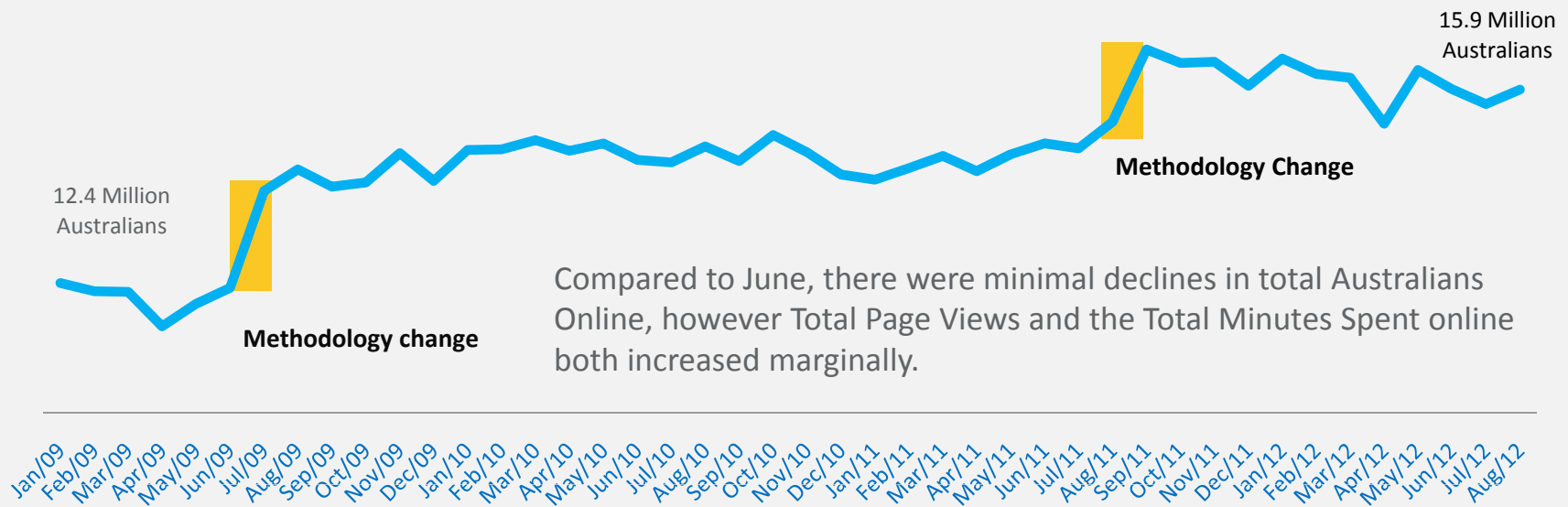
Key Online Statistics – August 2012

15.9 Million Australians Online – Up 1.7% on July



42 Billion Page Views – Steady on July

29 Billion Minutes Spent – Steady on July

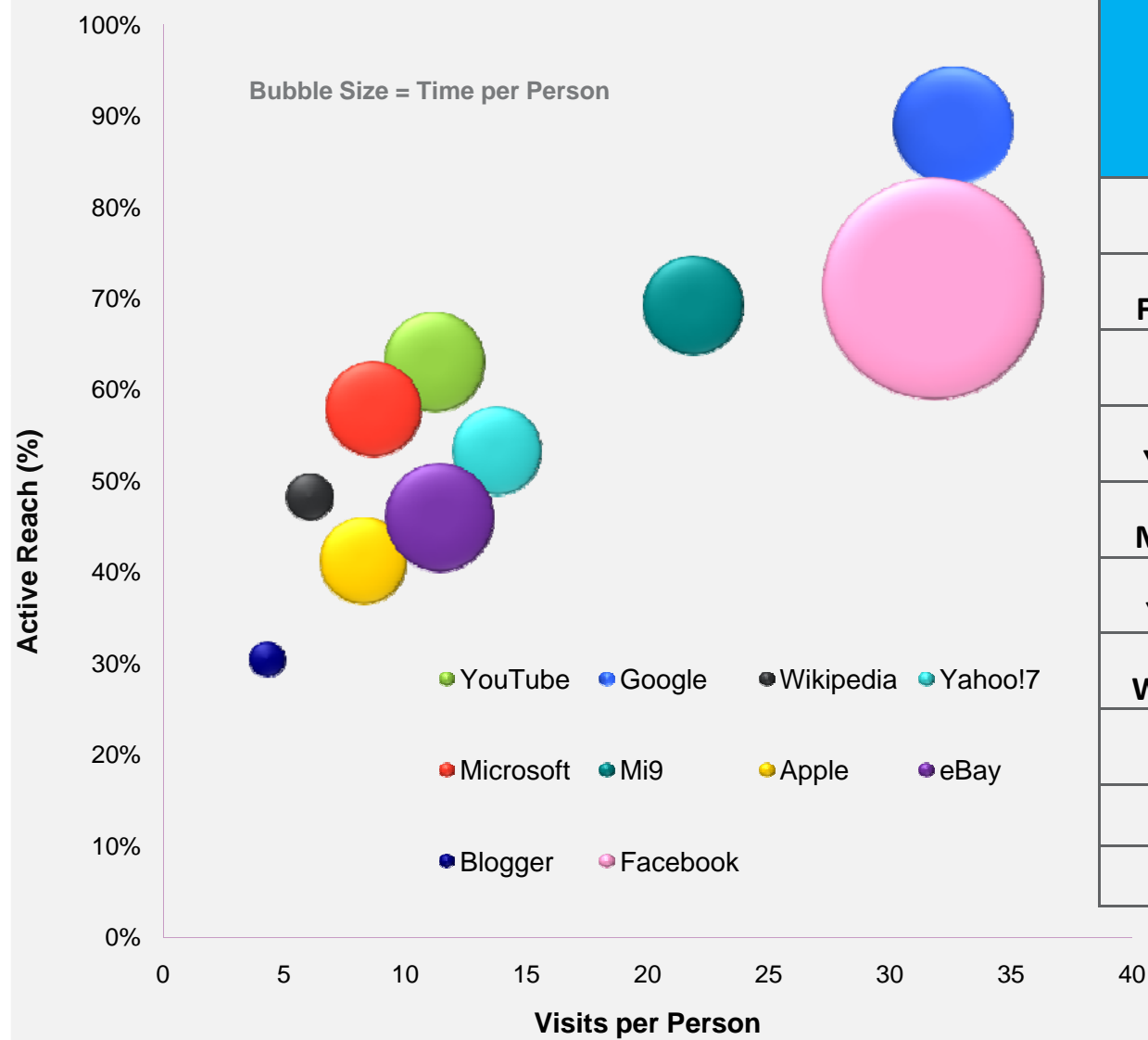


nielsen

Top 10 Brands – August 2012

Brands	Unique Audience (000) Aug 12	Page Views (000's)	Average Time Spent (HH:MM)	Audience Change Month on Month	Rank (Aug 12)
Google	14,101	3,620,936	2:10:56	4%	1
Facebook	11,273	7,225,703	7:40:46	-1%	2
NineMSN/MSN	10,981	1,503,991	1:31:51	3%	3
YouTube	9,988	1,084,147	1:34:07	1%	4
Microsoft	9,177	50,764	1:25:15	4%	5
Yahoo!7	8,449	902,484	1:13:39	1%	6
Wikipedia	7,640	182,102	0:20:30	5%	7
eBay	7,288	1,594,749	1:49:34	2%	8
Apple	6,537	63,712	1:09:58	0%	9
Blogger	4,824	72,667	0:11:44	0%	10

Top 10 Brands – Stickiness – August 2012



Brands	Visits Per Person	Active Reach	Time Per Person
Google	32.63	89%	2:10:56
Facebook	31.81	71%	7:40:46
Mi9	21.87	69%	1:31:51
YouTube	11.21	63%	1:34:07
Microsoft	8.68	58%	1:25:15
Yahoo!7	13.78	53%	1:13:39
Wikipedia	6.04	48%	0:20:30
eBay	11.43	46%	1:49:34
Apple	8.25	41%	1:09:58
Blogger	4.33	30%	0:11:44

Age Demographic % Breakdown – August 2012

2-17

% of Online Aus **9.5%**

Average PV's **1244**

Average PC time **23:35**

18-24

% of Online Aus **12.9%**

Average PV's **2,805**

Average PC time **65:03**

25-34

% of Online Aus **18.4%**

Average PV's **3,657**

Average PC time **101:01**

35-49

% of Online Aus **28.7%**

Average PV's **2,947**

Average PC time **87:44**

50+

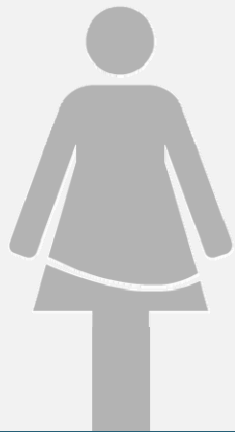
% of Online Aus **30.5%**

Average PV's **2,534**

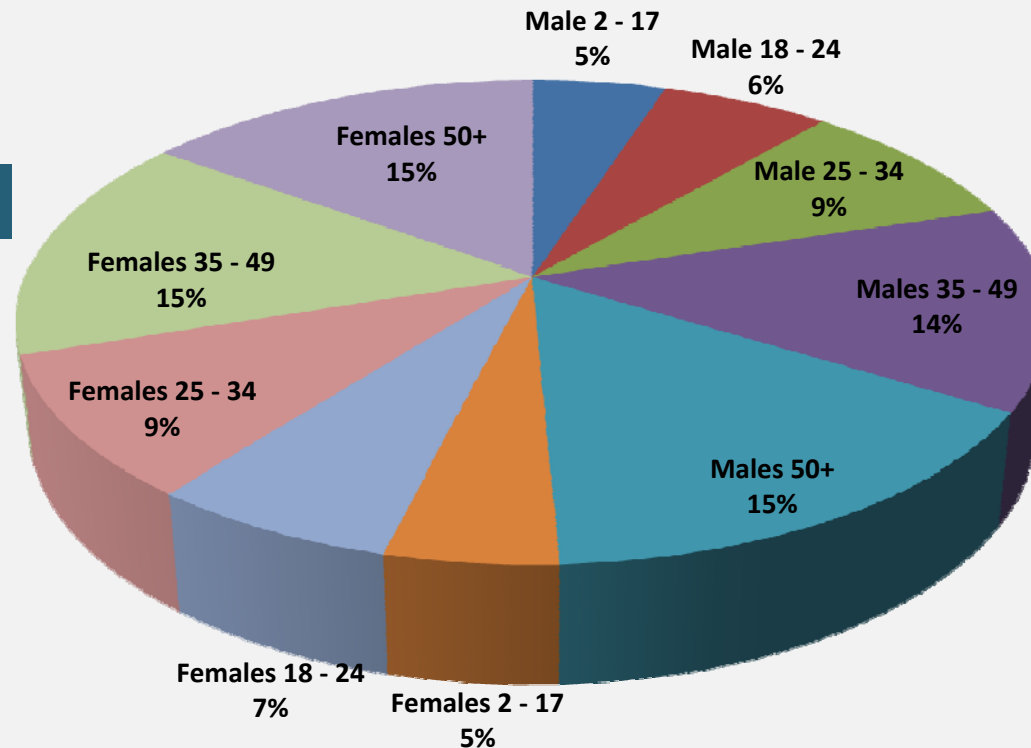
Average PC time **81:49**

Gender Breakdown – August 2012

Number of Online Australians
by age groups and gender

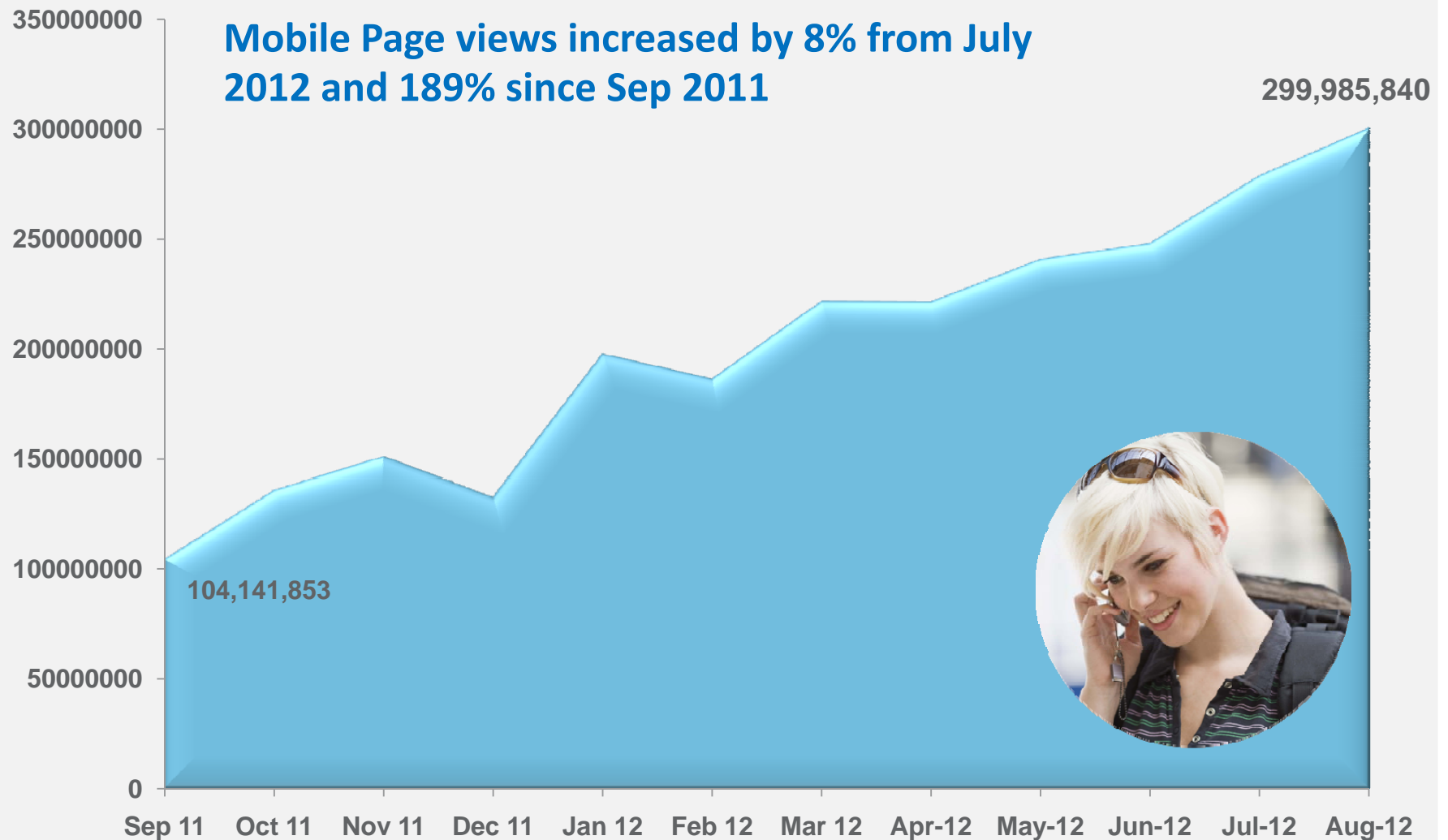


8,046,000



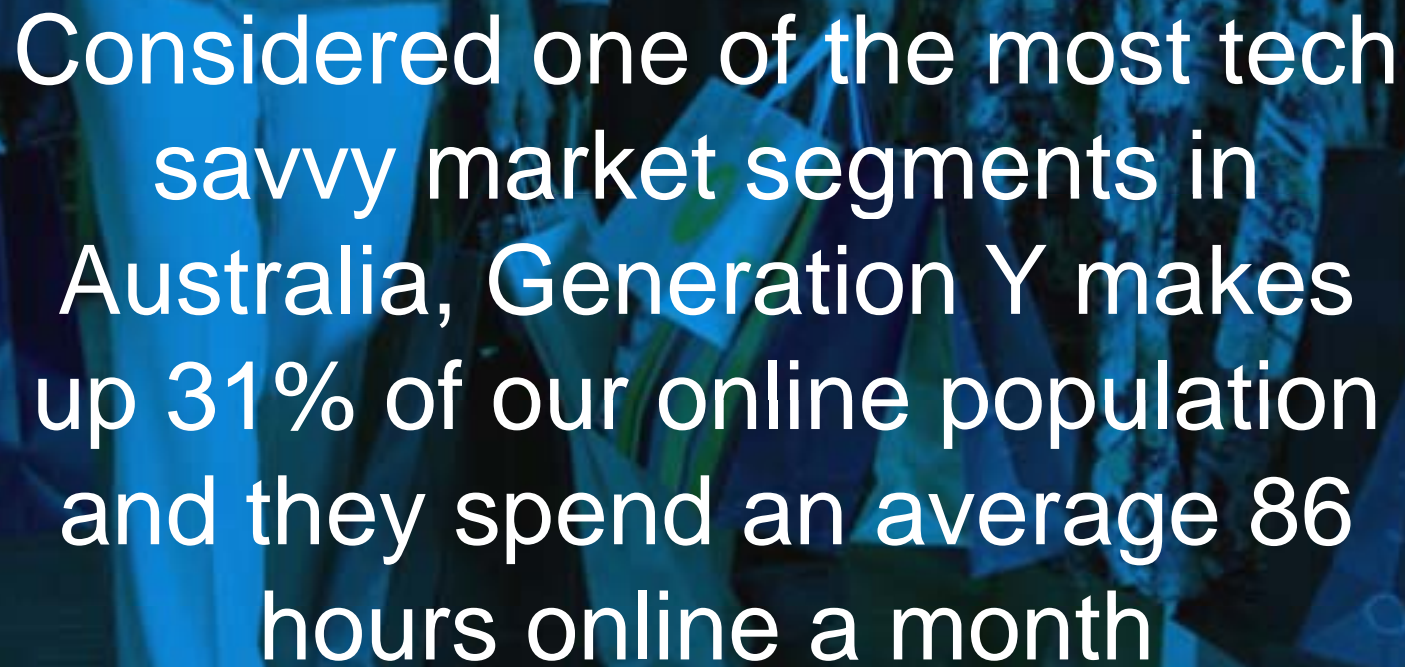
7,830,000

Mobile Page Views Australia – August 2012



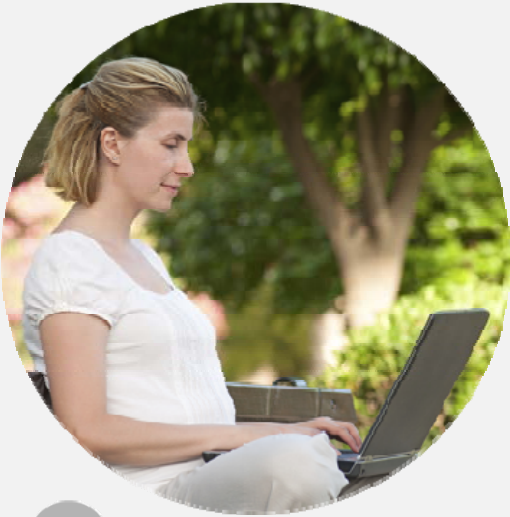
Spotlight – Australia's Online Gen Y's

Australians aged 18 to 34 years

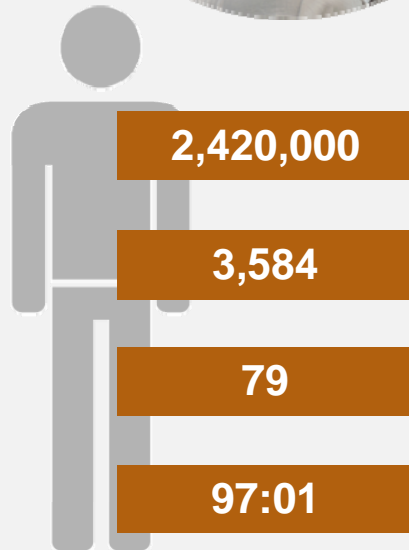


Considered one of the most tech savvy market segments in Australia, Generation Y makes up 31% of our online population and they spend an average 86 hours online a month

Spotlight – Australia's Online Gen Y's



Generation Y consumers are viewed as one of the more tech savvy segments in Australia, with nearly 5 million going online in the month of August, making up 31% of the online population.

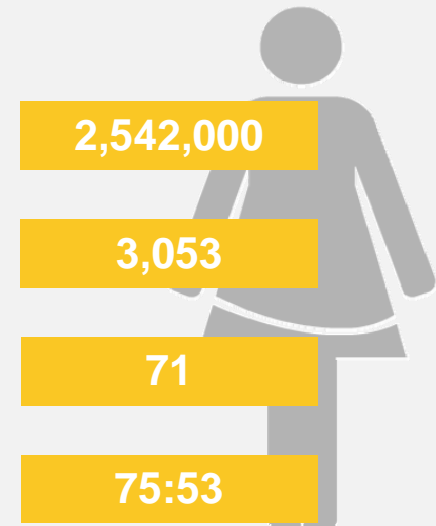


Number of Online Gen Ys

Average pages viewed per month

Number of Sessions per month

Average PC time per month (HH:MM)



Spotlight – Australia's Online Gen Y's

Online Engagement within the 18-34 year olds generation

An interesting behavioural divide emerges when examining the two distinct age segments of the Gen Y generation (see tables below).

The younger demographic, online 18-24 year olds, have much lower online engagement compared to their older cohorts across average page views, average sessions and time spent.

This is driven by two factors, younger people are much heavier users of portable devices such as Mobiles and Tablets rather than traditional PCs. Also the older segment are more likely to be working in an office environment and have a reliance on the internet/email for business activities.

Gen Y's 18-24 Year Olds

Unique Audience	2,044,00
Average Page Views per Person	2,805
Average Session per Person	54.81
Average Time per Person	65:03

Gen Y's 25-34 Year Olds

Unique Audience	2,917,000
Average Page Views per Person	3,657
Average Session per Person	88.79
Average Time per Person	101:01

Spotlight – Australia's Online Gen Y

Top 10 Brands

Gen Y's top 10 Website Brands by UA

Rank	Top Brands	Unique Audience [000's]	Unique Audience Composition (%)
1	Google	4,439	31.48
2	Facebook	3,845	34.11
3	Mi9	3,694	33.65
4	YouTube	3,438	34.43
5	Microsoft	2,985	32.53
6	Yahoo!7	2,822	33.40
7	Wikipedia	2,607	34.12
8	eBay	2,449	33.61
9	Apple	2,310	35.33
10	Blogger	1,896	39.30

Gen Y's top 10 Brands By UA Composition

Rank	Top Brands	Unique Audience [000's]	Unique Audience Composition (%)
1	9GAG	252	81.04
2	Macquarie University	113	79.54
3	sidereel	122	74.84
4	Imgur	316	74.10
5	Quora	113	70.27
6	Outlook.com	259	70.07
7	Kickstarter	153	68.13
8	Quickmeme	113	66.86
9	overclockers.com.au	161	66.62
10	Springshare	96	66.41

Spotlight – Australia's Online Gen Y

Mobiles Internet Usage

Gen Y are among the biggest users of Mobile Internet in Australia, making up 44% of users in the past seven days. They are also 41% more likely to have used Mobile Internet than the rest of the online population



- **56%** of Gen Y's used Mobile Internet in the past 7 days
- **71%** of Gen Y's currently own a Smart Phone

How do Gen Y using Mobile Internet?

- **59%** use it to browse the web
- **49%** use it to send & receive emails
- **33%** make video calls

And Gen Y are responsible for:

- **60%** of all streaming music
- **69%** of video downloads / viewing
- **51%** of all game downloads

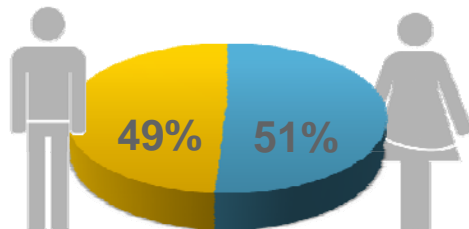
Apple is Gen Y's handset of choice with 34% of owning an iPhone. Followed by Nokia with 22% then Samsung with 14%

Category Spotlight

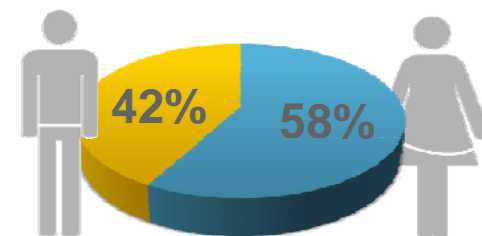
Multi-Category Commerce

The Multi-Category Commerce category is made up of the majority of online shopping sites across a variety of categories. The category, which covers Auction, Coupon, Mass Merchandiser and Shopping Directory sites, reaches over 11 million Australians, with the average consumer spending nearly 2 and a half hours on category sites and nearly 300 page views in August 2012.

**Gender Split By
Unique Audience**

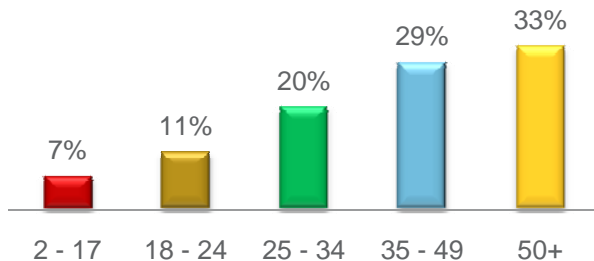


**Gender Split By
Page Views**

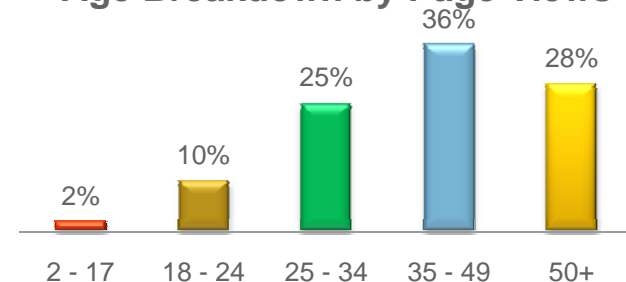


Although Gender split is almost even, Women dominate overall Page Views. Also dominant are the over 35s who make up nearly two thirds of all Page Views

Age Breakdown by Unique Audience



Age Breakdown by Page Views



Source: Nielsen Online Ratings August 2012

Category Spotlight

Multi-Category Commerce – Top 10 Brands

Brands	Unique Audience (000) August 12	Page Views (000's)	Average Time Spent (HH:MM)	Total Session	Sub-Category
eBay	7,288	1,594,749	1:49:34	798,493	Classifieds/Auctions
Gumtree	3,605	199,710	0:31:43	114,325	Classifieds/Auctions
Amazon	3,433	81,710	0:15:26	52,992	Mass Merchandiser
Woolworths	2,734	45,555	0:08:57	24,475	Mass Merchandiser
FlyBuys	2,524	22,393	0:03:56	9,911	Coupons/Rewards
JB Hi-Fi	1,673	29,690	0:09:02	15,097	Mass Merchandiser
Groupon Australia	1,608	11,878	0:05:48	9,338	Coupons/Rewards
Catch of the Day	1,512	39,137	0:18:45	28,348	Coupons/Rewards
BIG W	1,510	17,527	0:06:40	10,053	Mass Merchandiser
Myshopping.com.au	1,506	6,679	0:02:08	3,213	Shopping Directories & Guides

Source: Nielsen Online Ratings August 2012

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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, sans-serif font, with the "ni" in blue and the "elsen" in grey. Below the word is a horizontal line of seven dots. The logo is partially enclosed by a white circular shape that overlaps the blue background and the green hill.

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