



Australian Online Landscape Review

September 2012

State of the Online Landscape – September 2012

Snapshots of the Australian Online Consumer

In this latest release for September 2012, we present the latest unique audience trends; including market statistics, gender demographics, top performing major categories, brands and sectors. The overall unique audience of 15.7 million online Australians was down 1.4% on August (due mainly to one less day in the month) with 39 billion page views and 27 billion minutes spent online.

The escalating use of mobile usage continued in September with Mobile Page views increasing to more than 308 million, an increase of 3% from August 2012 and 196% since October 2011.

Following the November launch of our new online video measurement tool VideoCensus; we spotlight this rapidly booming online sector. With more than three-quarters of online Aussies (11.7million) watching web based video content in September, and media planners and their clients looking to maximize the efficiency of their media advertising investments, VideoCensus offers accountable insights into the reach of this engaged online market.

Included in the September findings, VideoCensus revealed that a staggering 1.49 billion streams were viewed by Australians who on average spent almost five and a half hours viewing 127 streams. Interestingly, the Gen Ys (those aged 18 to 24) were by far the most engaged with video, spending the most time viewing content (an average of 11 hours), while the over 55s made up the biggest audience segment with 3.64 million. This generation however, spent the least amount of time viewing - on average just 2 minutes and 30 seconds; and were also the lowest for average number of streams (62 during September compared to 243 for Gen Ys).

Matt Bruce – Managing Director of Media, Nielsen



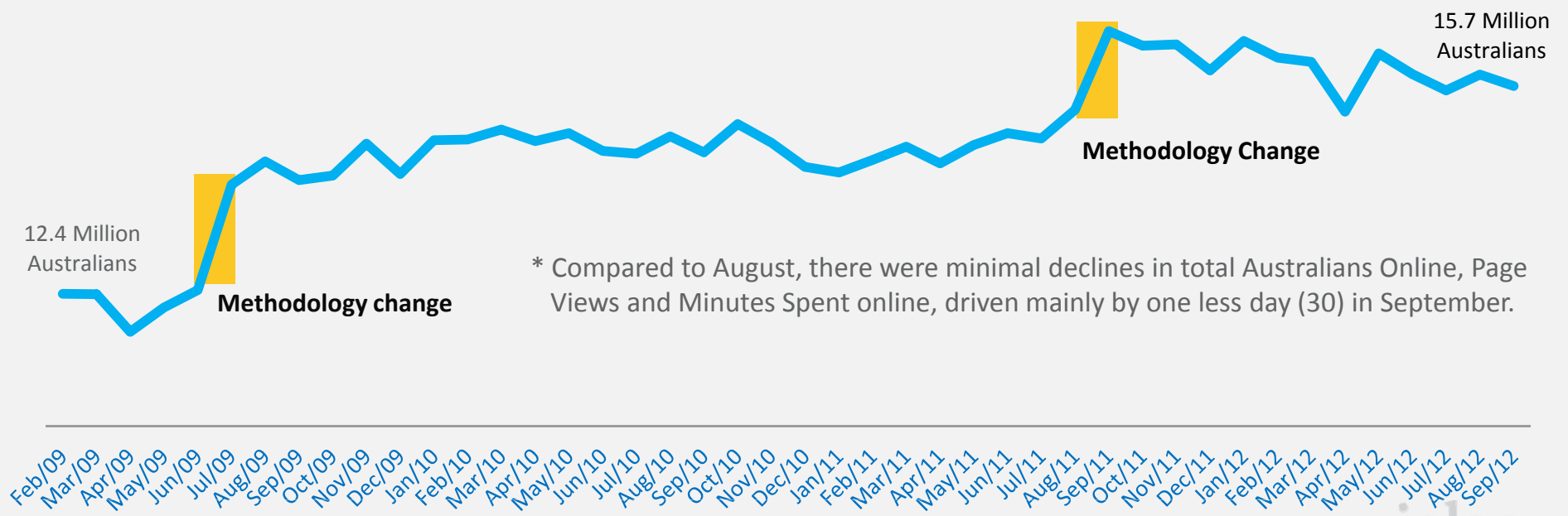
Key Online Statistics – September 2012

15.7 Million Australians Online – Down 1.4%* on August



39 Billion Page Views – Down 6%* on August

27 Billion Minutes Spent – Down 5%* on August



* Compared to August, there were minimal declines in total Australians Online, Page Views and Minutes Spent online, driven mainly by one less day (30) in September.

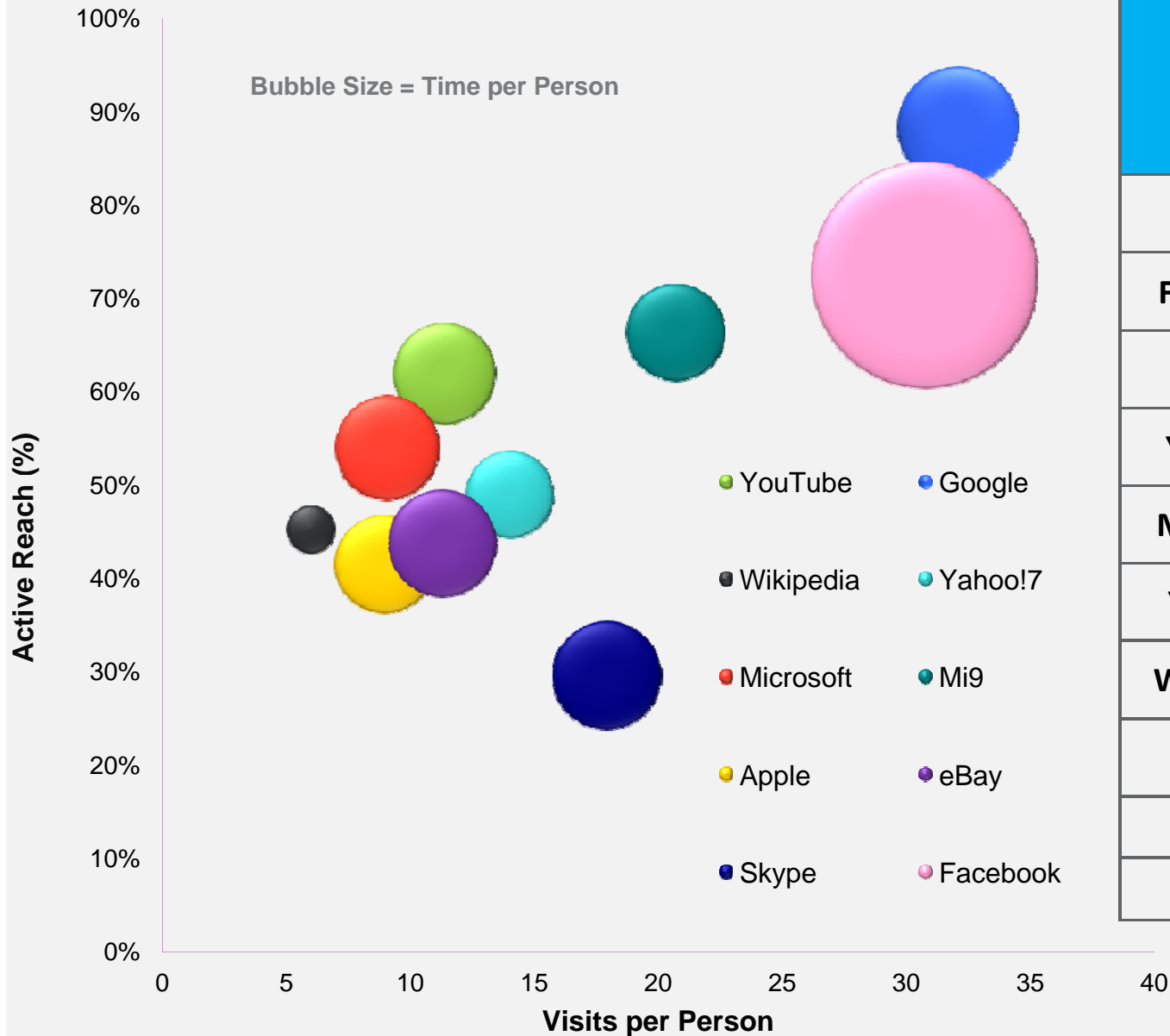
Top 10 Brands – September 2012

| Brands | Unique Audience (000's) Sep 2012 | Page Views (000's) | Average Time Spent (HH:MM) | Audience Change Month on Month* | Rank (Sep 2012) |
|------------------|----------------------------------|--------------------|----------------------------|---------------------------------|-----------------|
| Google | 13,832 | 3,423,613 | 2:04:44 | -2% | 1 |
| Facebook | 11,342 | 6,860,290 | 7:27:22 | 1% | 2 |
| Mi9 | 10,371 | 1,290,436 | 1:23:11 | -6% | 3 |
| YouTube | 9,684 | 1,079,152 | 1:30:25 | -3% | 4 |
| Microsoft | 8,440 | 44,272 | 1:33:07 | -8% | 5 |
| Yahoo!7 | 7,650 | 845,485 | 1:05:18 | -9% | 6 |
| Wikipedia | 7,074 | 164,191 | 0:20:03 | -7% | 7 |
| eBay | 6,839 | 1,438,940 | 1:41:22 | -6% | 8 |
| Apple | 6,479 | 73,471 | 1:25:51 | -1% | 9 |
| Skype | 4,616 | 7,153 | 1:42:05 | 7% | 10 |

*Compared to August, there were minimal declines for most in total Unique Audience, driven mainly by one less day (30) in September.



Top 10 Brands by Stickiness – September 2012



| Brands | Visits Per Person | Active Reach | Time Per Person |
|------------------|-------------------|--------------|-----------------|
| Google | 32.08 | 88% | 2:04:44 |
| Facebook | 30.78 | 72% | 7:27:22 |
| Mi9 | 20.72 | 66% | 1:23:11 |
| YouTube | 11.36 | 62% | 1:30:25 |
| Microsoft | 9.06 | 54% | 1:33:07 |
| Yahoo!7 | 14.02 | 49% | 1:05:18 |
| Wikipedia | 6.01 | 45% | 0:20:03 |
| eBay | 11.29 | 44% | 1:41:22 |
| Apple | 8.98 | 41% | 1:25:51 |
| Skype | 17.94 | 29% | 1:42:05 |

Age Demographic % Breakdown – September 2012

2-17

% of Online Aus **9.5%**
Average PV's **1,192**
Average PC time **22:00**

18-24

% of Online Aus **14.2%**
Average PV's **2,517**
Average PC time **61:02**

25-34

% of Online Aus **18.3%**
Average PV's **3,323**
Average PC time **93:39**

35-49

% of Online Aus **27.6%**
Average PV's **2,842**
Average PC time **85:23**

50+

% of Online Aus **30.4%**
Average PV's **2,493**
Average PC time **81:59**

Gender Breakdown – September 2012

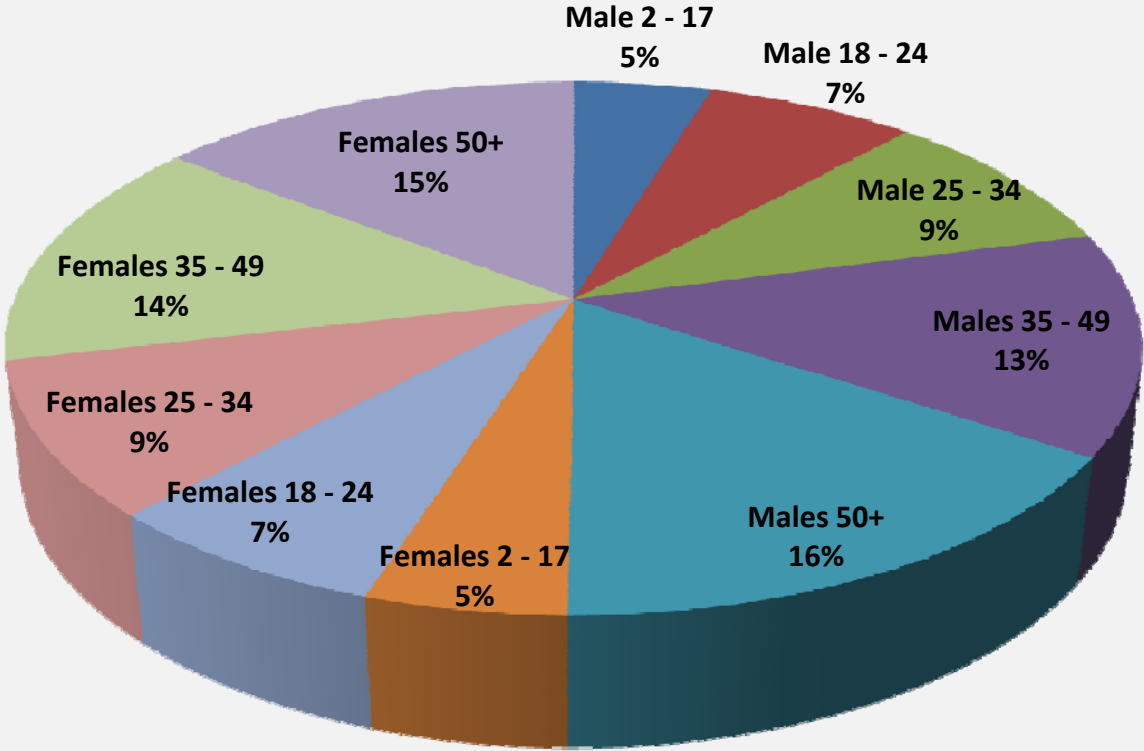
Number and percentage of Online Australians by age group and gender



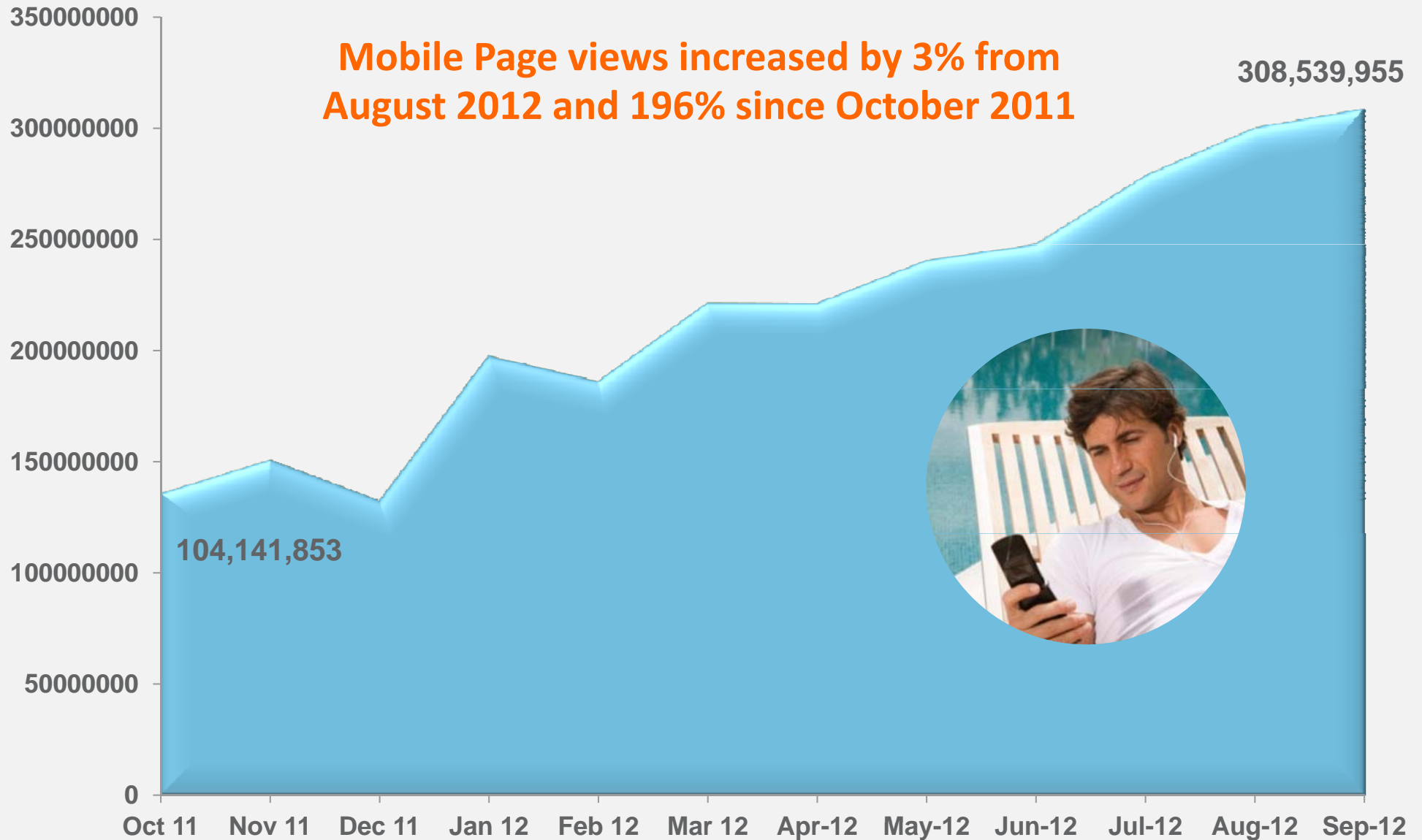
8,046,000



7,830,000

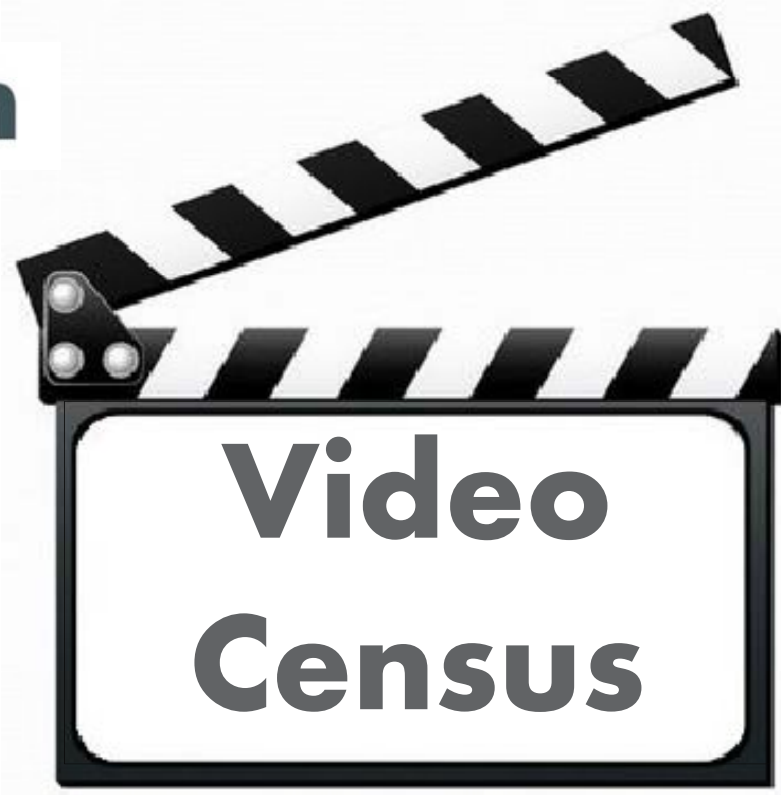


Mobile Page Views Australia – September 2012



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

Spotlight – Video Census



.....Online video streaming is booming in Australia

Spotlight – Video Census

Video Census is Nielsen's online video measurement tool, providing the market with accurate breakdowns of how and where Australians are streaming online content.



In the month of September 2012:

- **11.7 million** Australians streamed online videos
- A staggering **1.49 Billion** streams were viewed
- **3.8 Billion** minutes spent streaming Content
- On average, Australian's spent **5 hours** and **28 minutes** watching online video and viewed **127** streams.

Source: Nielsen VideoCensus September 2012

Spotlight – Video Census

Demographic Breakdown

In terms of the total number of video streaming Australians last month, the genders are fairly evenly split. However, in engagement terms **males consumed nearly 33% more video streams** than females. Apart from special interests, **sports video streaming** would be a significant driver of this gender skew.



5,987,000

931,498,000

156

06:19

Number of Streaming Australians

Total Number of Streams Viewed

Average Streams viewed per month

Average PC time per month (HH:MM)



5,691,000

557,063,000

98

04:24

Spotlight – Australia's Online Generation Breakdown

Gen Y's
18-24 Year Olds

| | |
|------------------------------------|------------------|
| Unique Audience | 1,494,000 |
| Total Stream's | 363,458,000 |
| Average Stream's per Person | 243 |
| Average Time per Person | 11:00 |

Gen Y's
25-34 Year Olds

| | |
|------------------------------------|------------------|
| Unique Audience | 2,252,000 |
| Total Stream's | 379,388,000 |
| Average Stream's per Person | 168,00 |
| Average Time per Person | 07:19 |

Gen X's
35-49 Year Olds

| | |
|------------------------------------|------------------|
| Unique Audience | 3,264,000 |
| Total Stream's | 359,843,000 |
| Average Stream's per Person | 110 |
| Average Time per Person | 04:52 |

Baby Boomers
55+ Year Olds

| | |
|------------------------------------|------------------|
| Unique Audience | 3,649,000 |
| Total Stream's | 227,173,000 |
| Average Stream's per Person | 62 |
| Average Time per Person | 02:30 |

Spotlight – Video Census

How are streams measured?

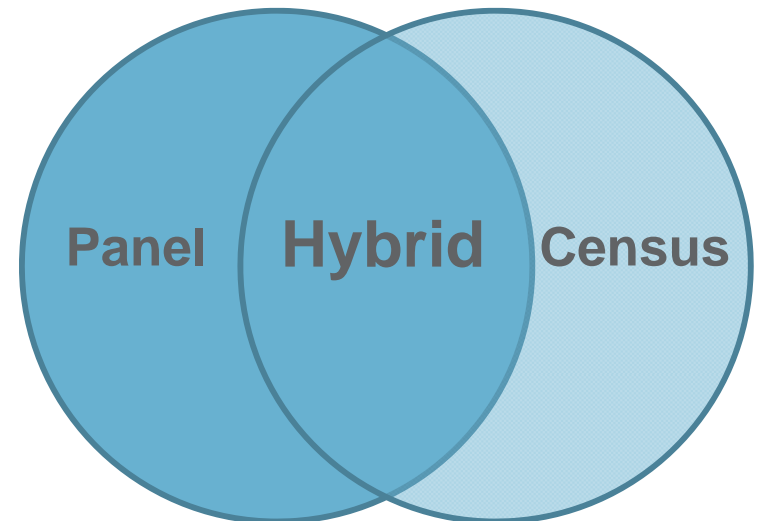
Nielsen VideoCensus is the first syndicated audience measurement product to combine passive and active measurement:

1. Passive Measurement

- Collect and credit streaming video activity using panel-based stream URL observations
- Does not require site participation

2. Active Measurement: Tagging

- Collect and credit streaming video activity using panel-based tag URL observations
- Collect census stream counts & granular detail on consumption by observing video player-based communication with Nielsen
- Requires site participation



Source: Nielsen VideoCensus September 2012

Media Enquiries please contact:
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The Nielsen logo is contained within a white circle that is partially obscured by a green wavy shape at the bottom of the slide. The word "nielsen" is written in a lowercase, serif font, with the "n" in blue and the rest in grey. Below the word are seven small grey dots.

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