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AUSTRALIAN ONLINE LANDSCAPE REVIEW

DECEMBER 2012



STATE OF THE ONLINE LANDSCAPE – DECEMBER 2012

In this December 2012 edition of the Nielsen Australian Online Landscape Review, we share the latest unique audience trends; including market statistics, gender demographics, top performing major categories, brands and sectors.

The overall unique audience of 15 million online Australians was down 1 percent on November with 38 billion page views and 25 billion minutes spent online.

Google and Facebook maintained their place as the top online brand by page, however both experienced unique audience declines in the month of December versus prior month, down one percent and two percent respectively.

Thirty one percent of the Australian Online population are from the 50+ age bracket, making this the largest online demographic and is skewed slightly higher to males (16%) versus females (15%).

The escalating use of mobile continued in December 2012 with mobile page views increasing to more than 334 million, an increase of three percent from November 2012 and an increase of 74 percent since January 2012

In December 2012, 11 million Australians streamed video content online. On average, Australians spent five hours and 53 minutes watching online video and viewed 136 streams. In terms of demographic engagement, males consumed nearly 33 percent more video streams than females.

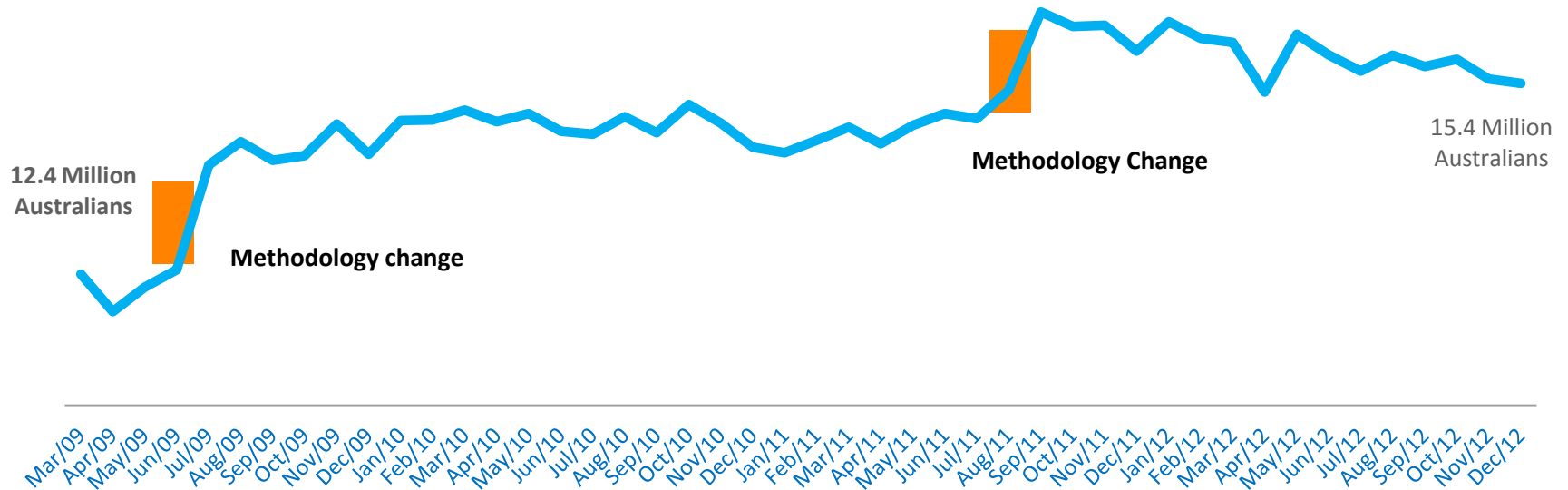
Despite a three point fall in Australian consumer confidence to 95 index points in Q4 2012, consumers signalled renewed hopes for a positive retail environment for 2013 as more than half (55%) of Australian consumers believe the next 12 months will be a good time to buy things they want and need – a significant increase of 13 percentage points from the previous quarter.

Matt Bruce – Managing Director Media, Nielsen

KEY ONLINE STATISTICS – DECEMBER 2012



- 15 Million Australians online – Down 1% on November
- 38 Billion page views – Down 11% on November
- 25 Billion minutes spent – Down 9% on November

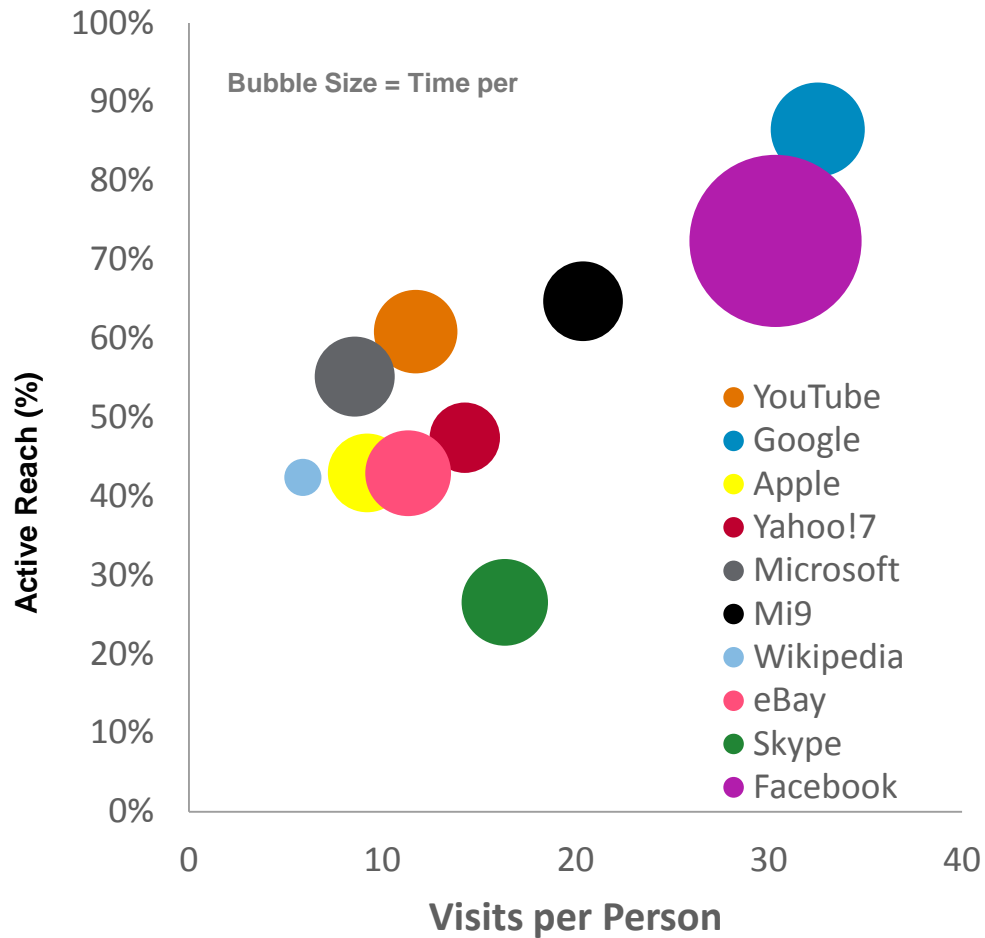


TOP 10 BRANDS – DECEMBER 2012

Brands	Unique Audience (000's) Dec 2012	Page Views (000's)	Average Time Spent (HH:MM)	Audience Change Month on Month*	Rank (Oct 2012)
Google	13,320	3,173,036	1:59:36	-2%	1
Facebook	11,146	5,908,056	6:41:43	-1%	2
Mi9	9,966	1,295,641	1:26:08	0%	3
YouTube	9,376	1,034,387	1:34:06	-2%	4
Microsoft	8,493	37,590	1:26:37	0%	5
Yahoo!7	7,303	802,510	1:06:52	1%	6
Apple	6,617	56,530	1:23:52	-4%	7
eBay	6,606	1,254,231	1:39:30	1%	8
Wikipedia	6,530	139,279	0:18:31	-5%	9
Skype	4,089	6,413	1:41:05	-6%	10

*Compared to November, there were large declines for most in total Unique Audience, driven mainly by seasonality over the holiday period

TOP 10 BRANDS BY STICKINESS – DECEMBER 2012



Brands	Visits Per Person	Active Reach	Time Per Person
Google	32.53	86%	1:59:36
Facebook	30.34	72%	6:41:43
Mi9	20.38	65%	1:26:08
YouTube	11.72	61%	1:34:06
Microsoft	8.57	55%	1:26:37
Yahoo!7	14.27	47%	1:06:52
Apple	9.22	43%	1:23:52
eBay	11.33	43%	1:39:30
Wikipedia	5.89	42%	0:18:31
Skype	16.34	27%	1:41:05

Source: Nielsen Online Ratings December 2012

AGE DEMOGRAPHIC % BREAKDOWN – DECEMBER 2012

2-17

% of Online Aus	8.7%
Average PV's	870
Average PC time	20:28

18-24

% of Online Aus	14.9%
Average PV's	2,351
Average PC time	59:15

25-34

% of Online Aus	17.9%
Average PV's	2,995
Average PC time	82:11

35-49

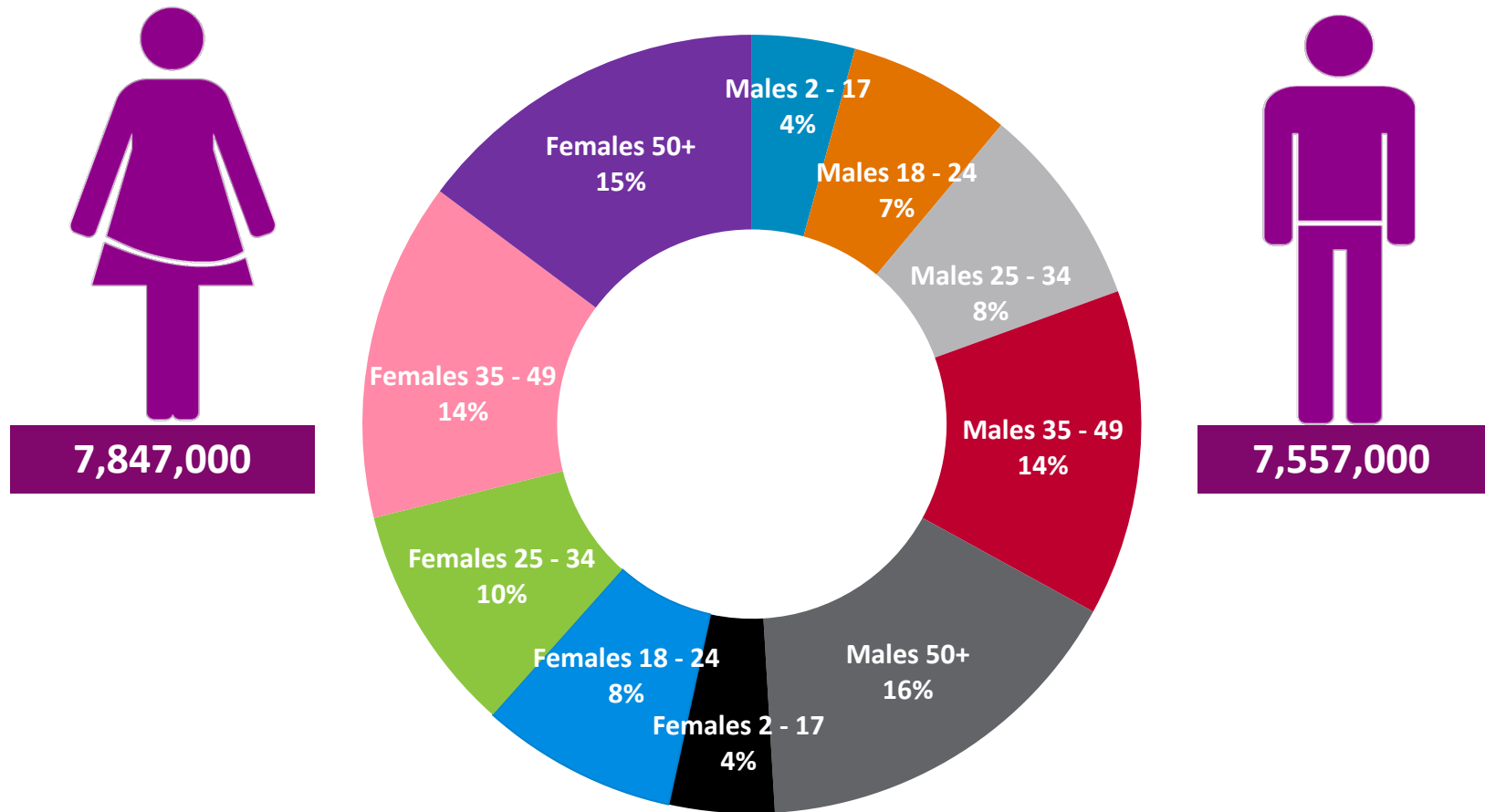
% of Online Aus	27.6%
Average PV's	2,787
Average PC time	80:32

50+

% of Online Aus	30.9%
Average PV's	2,345
Average PC time	76:43

GENDER BREAKDOWN – DECEMBER 2012

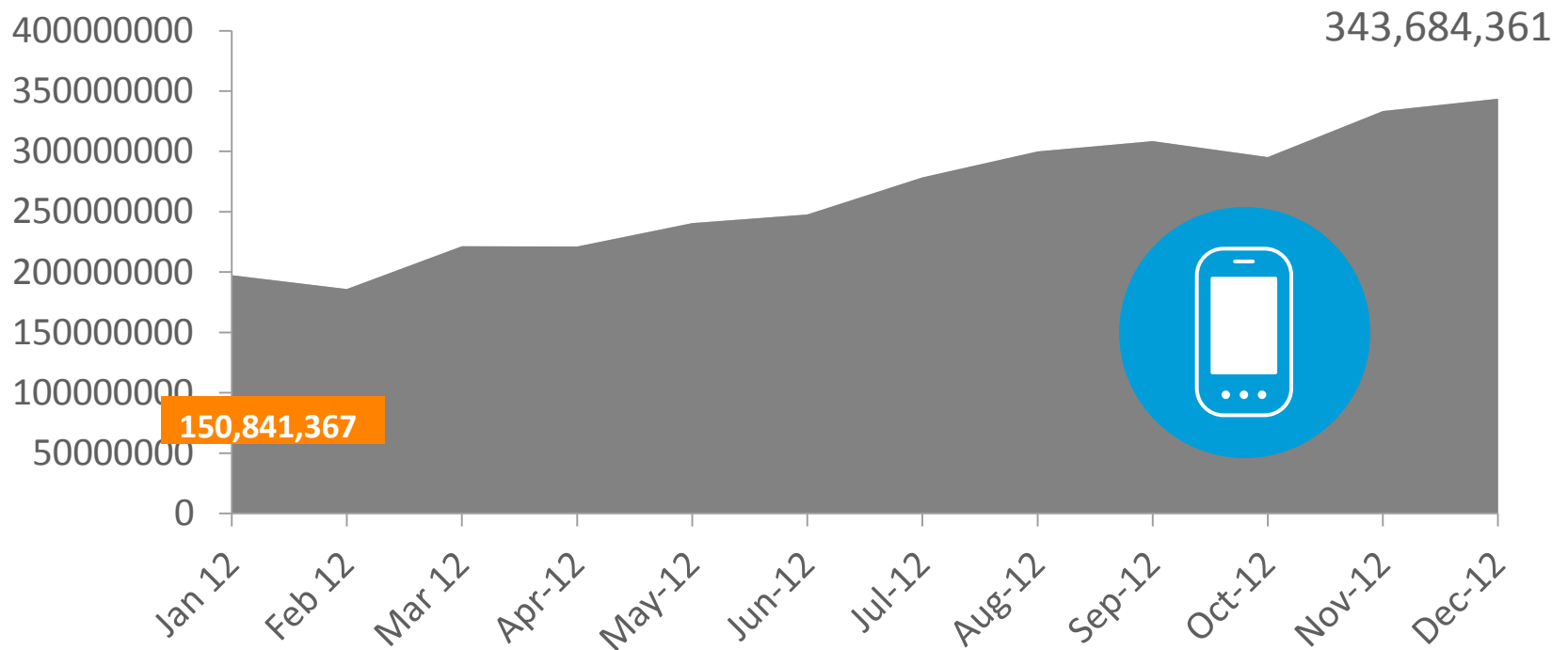
Number and percentage of online Australians by age group and gender



Source: Nielsen Online Ratings December 2012

MOBILE PAGE VIEWS – DECEMBER 2012

Mobile page views Increased by three percent from November 2012 and has increased 74 percent since January 2012



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

An abstract graphic on the left side of the slide. It features a series of concentric, curved lines that form a partial sphere or dome shape. The lines are colored in a gradient from purple to yellow. Several colored dots (yellow, purple, red) are placed on the surface of the sphere, with thin lines extending from them towards the right side of the frame.

SPOTLIGHT ON NIELSEN VIDEOCENSUS

NIELSEN VIDEOCENSUS – DECEMBER 2012

VideoCensus 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 December 2012:

- **11 million** Australians streamed online videos
- A grand total of **1.49 Billion** streams were viewed
- **3.9 Billion** minutes were spent streaming content
- On average, Australians spent **5 hours** and **53 minutes** watching online video and viewed **136** streams



Source: Nielsen VideoCensus December 2012

VIDEOCENSUS – DECEMBER 2012

TOP 10 BRANDS

Brands	Unique Audience (000's) Dec 2012	Total Streams (000's)	Average Time Spent (HH:MM)	Audience Change Month on Month*	Rank (Dec2012)
YouTube	9,723	1,158,974	04:48:41	1%	1
VEVO	2,468	44,943	00:38:45	12%	2
Facebook	2,362	13,700	00:16:14	20%	3
Mi9	1,940	23,988	00:22:09	-17%	4
The CollegeHumor Network	1,777	6,337	00:09:26	-6%	5
ABC Online Network	1,112	13,133	01:58:15	-15%	6
Yahoo!7	1,098	5,733	00:10:26	7%	7
smh.com.au	880	4,341	00:05:57	-4%	8
Dailymotion	618	22,370	01:36:57	1%	9
Apple	529	2,088	00:20:52	198%	10

Source: Nielsen VideoCensus December 2012

VIDEOCENSUS: DEMOGRAPHIC BREAKDOWN

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



5,462,000	Number of Streaming Australians	5,565,000
930,880,000	Total Number of Streams Viewed	563,961,000
170	Average Streams viewed per month	110
07:00	Average PC time per month (HH:MM)	04:47

Source: Nielsen VideoCensus December 2012

VIDEOCENSUS AGE DEMOGRAPHIC % BREAKDOWN – DECEMBER 2012

2-17

% of Online Aus	7.8%
Average Streams	166
Average Time	7:16

18-24

% of Online Aus	14.2%
Average Streams	246
Average Time	11:32

25-34

% of Online Aus	18.3%
Average Streams	186
Average Time	7:48

35-49

% of Online Aus	27.9%
Average Streams	119
Average Time	5:02

50+

% of Online Aus	31.8%
Average Streams	65
Average PC Time	2:39

Source: Nielsen VideoCensus December 2012

An abstract graphic on the left side of the page depicts a portion of a sphere or a dome. It is composed of numerous thin, curved lines in various colors (red, yellow, green, blue, purple) that form a grid-like pattern. Several small, solid-colored dots (yellow, green, purple, red) are scattered across the surface, with thin lines extending from them towards the right, suggesting data points or connections.

SPOTLIGHT ON CONSUMER CONFIDENCE

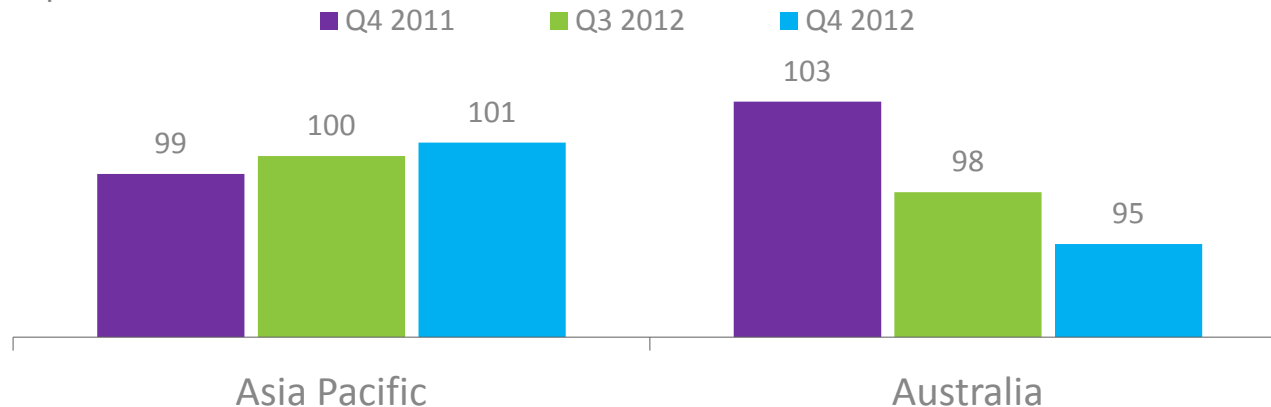
AUSTRALIANS GEAR UP FOR RETAIL SPENDING IN 2013

Australian consumers are starting the New Year with renewed retail optimism, despite an overall three-point fall in consumer confidence in Q4 2012.

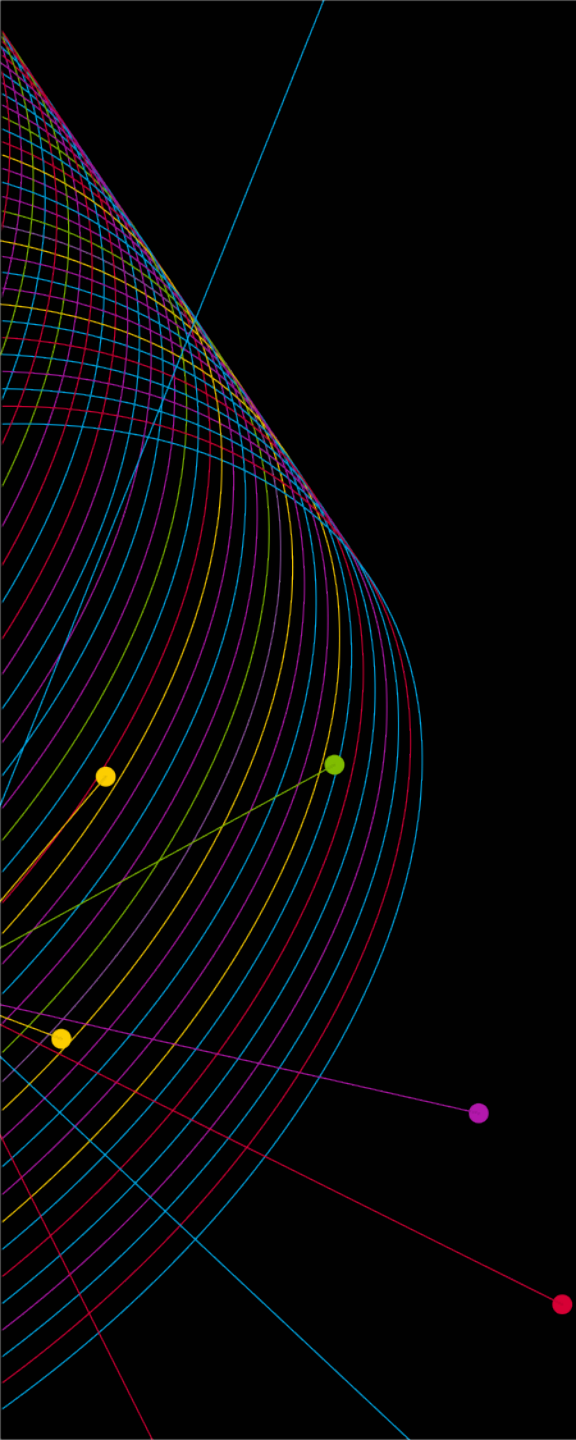
More than half of Australians believe the next 12 months will be a good time to buy the things they want and need – a significant increase of 13 percentage points from the previous quarter.

This encouraging rise in optimism is from Nielsen's latest *Global Survey of Consumer Confidence and Spending Intentions* report, which measures consumer confidence, major concerns and spending intentions among more than 29,000 Internet consumers in 58 countries.

To find out Australians' outlook on jobs and finances, attitudes to savings and spending, and, more importantly, if they will be advocating your brands and growing your categories, click [here](#) to download the complete report.



Source: Nielsen Global Survey of Consumer Confidence and Spending Intentions, Q4 2012



NIELSEN REPORTS

NIELSEN REPORTS:

The Australian Automotive Report: A study of Australian's behaviour when researching and buying cars - Now available!



The Australian Automotive Report:

- Among the new car buyer segment, Toyota, followed by Mazda and Holden are the most prevalent brands purchased/being considered
- For the used car buyer segment, Toyota, followed by Holden and Ford are the most popular brands purchased/being considered
- Women are more likely to be purchasing a car valued up to \$29,999 (53%) while men are more inclined to be spending from \$40,000 to as much as \$60,000 or even more on a car (44%)
- A considerable six in ten (61%) of all Australian used car buyers now access the internet via a mobile phone and more than half of new car buyers do so (53%).



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AN UNCOMMON SENSE
OF THE CONSUMER™

If you have any queries regarding this report, contact Jackie Helliker
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