



nielsen

AUSTRALIAN ONLINE LANDSCAPE REVIEW

JANUARY 2013



THE ONLINE LANDSCAPE – JANUARY 2013

In this January 2013 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 15.5 million online Australians was up marginally by 0.8% on December 2012 with 39 billion page views and 23 billion minutes spent online.

The escalating use of mobile continued in January with Mobile Page Views growing to more than 410 million, an increase of 19 percent from December 2012 and 108 percent since January 2012.

Following the November launch of our new online video measurement tool VideoCensus; we again spotlight this rapidly booming online sector. With more than three-quarters of online Aussies (11.2 million) watching web based video content in January 2013, and media planners and their clients looking to maximise the efficiency of their media advertising investments, VideoCensus offers accountable insights into the reach of this engaged online market.

Also shared in this January 2013 edition of the Nielsen Online Landscape review, are snapshot of findings from the 15th edition of the annual **Australian Connected Consumers** report. This year's report revealed that more Australian homes now have access to internet via their TV than via a tablet, with 33 percent of Australian homes having an TV that can connect to the internet vs. 31 percent with a tablet computer. However, regular usage of these devices tells a very different story with only 5% of all online Australians using a connected TV to access the internet on a regular basis and 19% using a tablet regularly. The report also delves into the rise of simultaneous media, with dual screening increasing from 60 percent in 2011 to 74 percent in 2012.

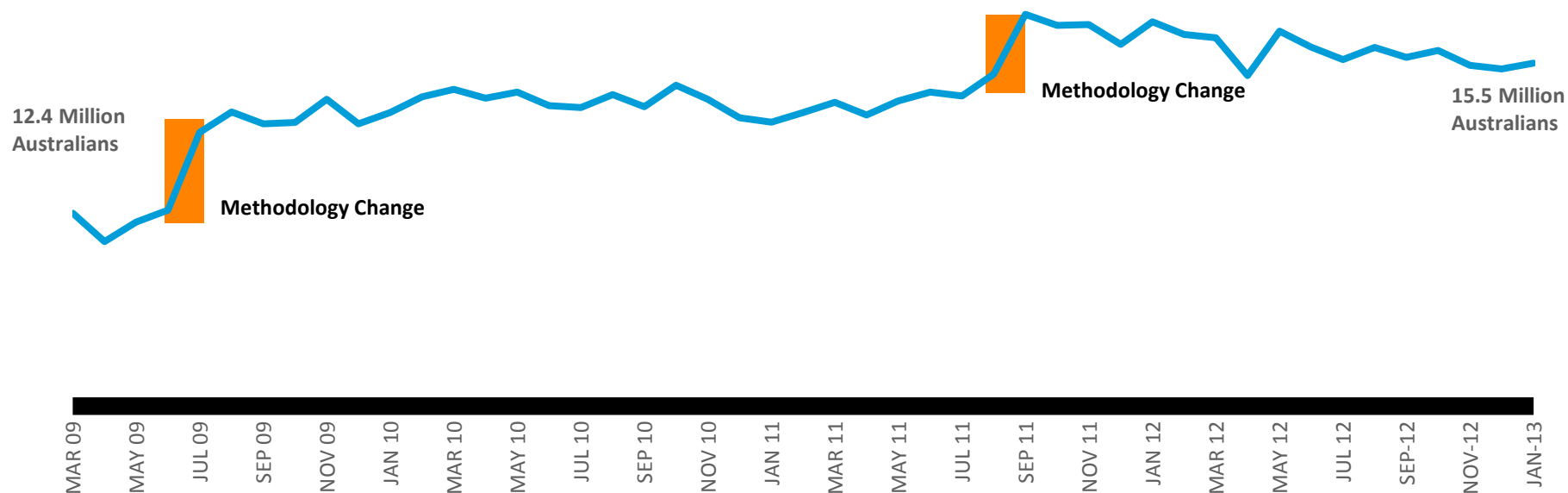
Last but not least, don't forget to check out the **Consumer 360** video and website (slide 19) for more information about this this fantastic two day event being held 1-3, May in the Blue Mountains. I hope you can join us!

Best Regards,
Matt Bruce – Managing Director of Media, Nielsen

KEY ONLINE STATISTICS – JANUARY 2013



- 15.5 Million Australians online – Up 0.8% on December
- 39 Billion page views – Up 8% on December
- 23 Billion minutes spent – Down 9% on December



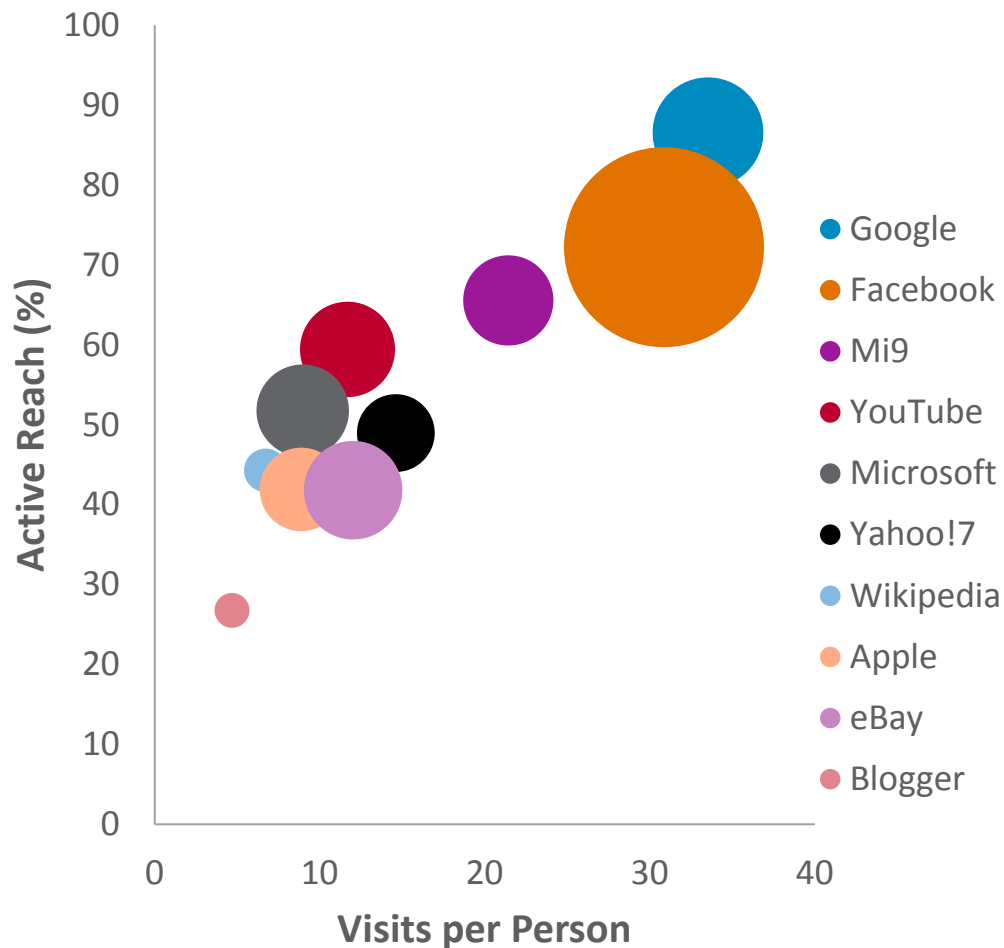
Source: Nielsen Online Ratings January 2013

TOP 10 BRANDS – JANUARY 2013

| Brands | Unique Audience (000's) Jan 2013 | Page Views (000's) | Average Time Spent (HH:MM) | Audience Change Month on Month | Rank (Dec 2012) |
|-----------|----------------------------------|--------------------|----------------------------|--------------------------------|-----------------|
| Google | 13,446 | 3,502,407 | 2:13:53 | 1% | 1 |
| Facebook | 11,220 | 6,410,776 | 7:17:23 | 1% | 2 |
| Mi9 | 10,183 | 1,376,467 | 1:29:16 | 2% | 3 |
| YouTube | 9,232 | 1,058,274 | 1:39:18 | -2% | 4 |
| Microsoft | 8,038 | 45,402 | 1:33:31 | -5% | 5 |
| Yahoo!7 | 7,607 | 844,070 | 1:05:58 | 4% | 6 |
| Wikipedia | 6,881 | 172,616 | 0:20:41 | 5% | 9 |
| Apple | 6,509 | 49,238 | 1:15:58 | -2% | 7 |
| eBay | 6,494 | 1,341,504 | 1:46:13 | -2% | 8 |
| Blogger | 4,156 | 80,492 | 0:13:17 | 8% | 12 |

Source: Nielsen Online Ratings January 2013

TOP 10 BRANDS BY STICKINESS – JANUARY 2013



| Brands | Visits Per Person | Active Reach | Time Per Person |
|-----------|-------------------|--------------|-----------------|
| Google | 33.53 | 86.56 | 2:13:53 |
| Facebook | 30.87 | 72.23 | 7:17:23 |
| Mi9 | 21.43 | 65.55 | 1:29:16 |
| YouTube | 11.69 | 59.43 | 1:39:18 |
| Microsoft | 8.97 | 51.75 | 1:33:31 |
| Yahoo!7 | 14.62 | 48.97 | 1:05:58 |
| Wikipedia | 6.74 | 44.30 | 0:20:41 |
| Apple | 8.89 | 41.91 | 1:15:58 |
| eBay | 12.03 | 41.81 | 1:46:13 |
| Blogger | 4.70 | 26.76 | 0:13:17 |

Source: Nielsen Online Ratings January 2013

AGE DEMOGRAPHIC % BREAKDOWN – JANUARY 2013

2-17

| | |
|-----------------|-------|
| % of Online Aus | 8.9% |
| Average PV's | 712 |
| Average PC time | 19:16 |

18-24

| | |
|-----------------|-------|
| % of Online Aus | 15.6% |
| Average PV's | 2,503 |
| Average PC time | 63:43 |

25-34

| | |
|-----------------|-------|
| % of Online Aus | 17.9% |
| Average PV's | 3,258 |
| Average PC time | 89:24 |

35-49

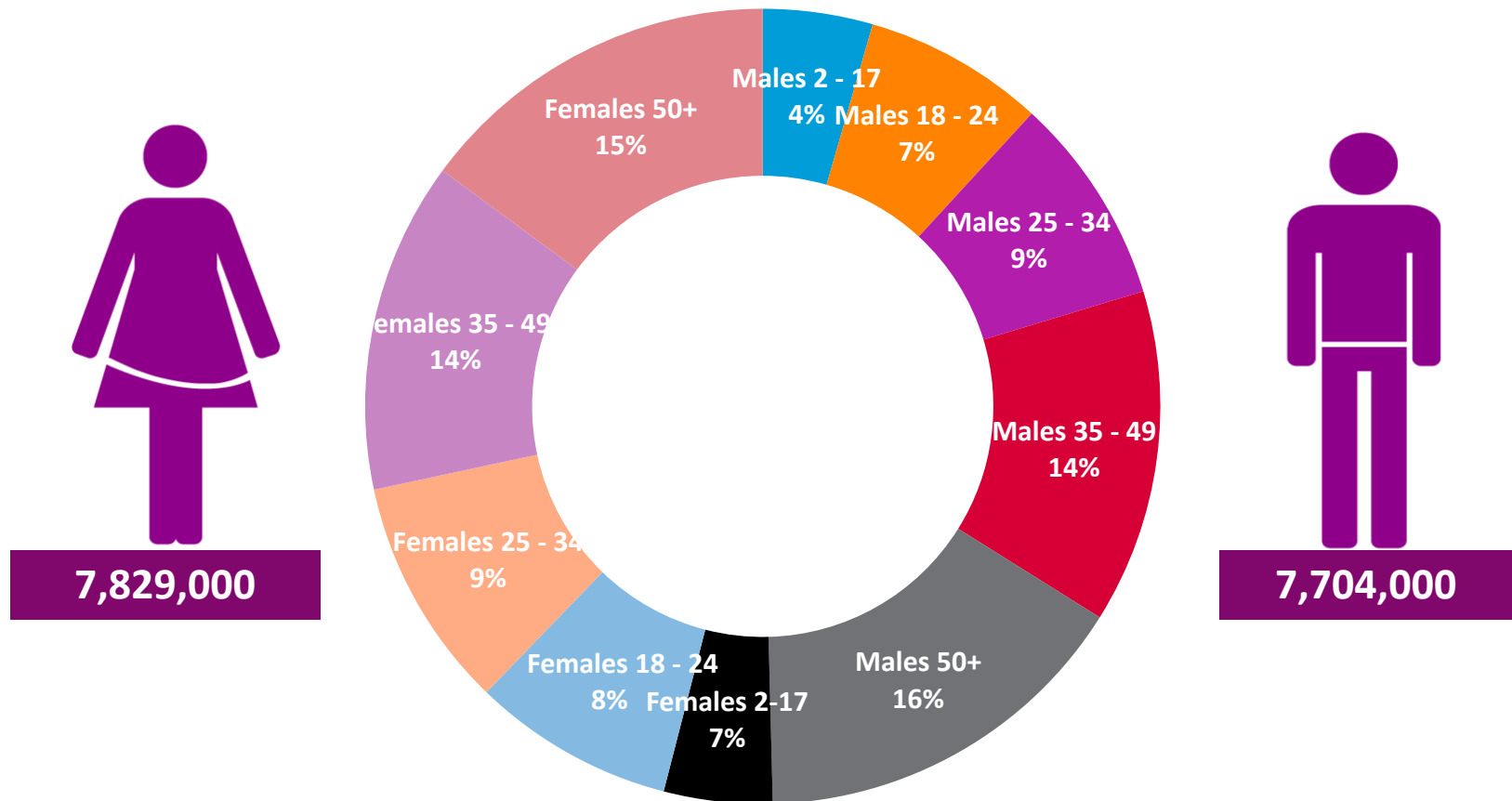
| | |
|-----------------|-------|
| % of Online Aus | 27.1% |
| Average PV's | 3,053 |
| Average PC time | 87:43 |

50+

| | |
|-----------------|-------|
| % of Online Aus | 30.6% |
| Average PV's | 2,573 |
| Average PC time | 83:40 |

GENDER BREAKDOWN – JANUARY 2013

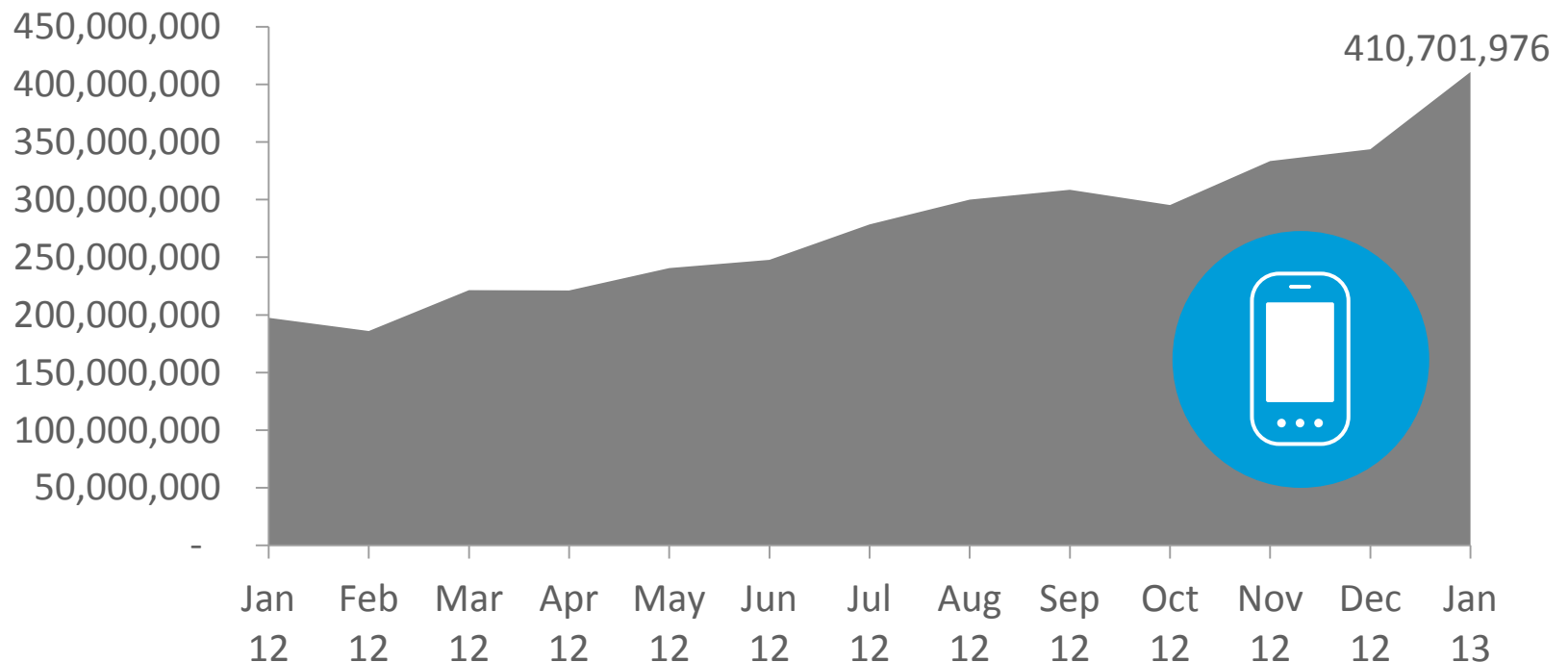
Number and percentage of Online Australians by age group and gender



Source: Nielsen Online Ratings January 2013

MOBILE PAGE VIEWS – JANUARY 2013

Mobile Page views increased by 19% from December 2012 and has increased 108% since January 2012



Source: Nielsen Online Traffic (Mobile Market Intelligence – January 2013)



SPOTLIGHT ON NIELSEN VIDEO CENSUS

VIDEOCENSUS – JANUARY 2013

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 January 2013:

- **11.2 million** Australians streamed online videos
- A grand total of **1.86 billion** streams were viewed
- **4.5 billion** minutes were spent streaming content
- On average, Australian's spent **6 hours** and **45 minutes** watching online video and viewed **165** streams



Source: Nielsen VideoCensus January 2013

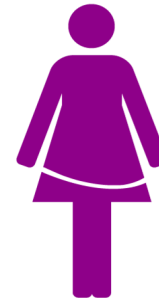
VIDEO CENSUS TOP 10 BRANDS – JANUARY 2013

| Brands | Unique Audience (000's) Jan 2013 | Total Streams (000's) | Average Time Spent (HH:MM) | Audience Change Month on Month | Rank (Dec 2012) |
|--------------------------|-------------------------------------|-----------------------|-------------------------------|-----------------------------------|-----------------|
| YouTube | 9,735 | 1,196,066 | 05:27:43 | 0.12% | 1 |
| Facebook | 3,670 | 25,333 | 00:18:35 | 55% | 3 |
| VEVO | 2,376 | 41,450 | 00:33:54 | -4% | 2 |
| Mi9 | 2,005 | 22,352 | 00:16:42 | 3% | 4 |
| The CollegeHumor Network | 1,634 | 5,360 | 00:11:53 | -8% | 5 |
| Yahoo! | 1,205 | 6,394 | 00:15:39 | 10% | 7 |
| ABC Online Network | 1,173 | 15,426 | 02:08:56 | 6% | 6 |
| smh.com.au | 983 | 5,229 | 00:05:26 | 12% | 8 |
| news.com.au | 718 | 2,658 | 00:05:29 | 80% | 13 |
| Dailymotion | 666 | 14,722 | 01:28:44 | 8% | 9 |

Source: Nielsen VideoCensus January 2013

VIDEO CENSUS: DEMOGRAPHIC BREAKDOWN

In terms of the total number of video streaming Australians last month, the genders are fairly evenly split with females accounting for slightly more streaming Australians. In engagement terms **males and females viewed an almost equal amount of streams**, a large change on December 2012 where males were viewing 33% more streams. This parity in stream views is attributable to seasonality and behavioural factors prevalent in the month of December.



| | | |
|-------------|-----------------------------------|-------------|
| 5,536,000 | Number of Streaming Australians | 5,669,000 |
| 929,119,000 | Total Number of Streams Viewed | 924,798,000 |
| 168 | Average Streams viewed per month | 163 |
| 07:42 | Average PC time per month (HH:MM) | 05:50 |

Source: Nielsen VideoCensus January 2013

VIDEO CENSUS AGE DEMOGRAPHIC % BREAKDOWN – JANUARY 2013

2-17

| | |
|-----------------|------|
| % of Online Aus | 7.5% |
| Average Streams | 146 |
| Average Time | 7:17 |

18-24

| | |
|-----------------|-------|
| % of Online Aus | 15.2% |
| Average Streams | 409 |
| Average Time | 12:17 |

25-34

| | |
|-----------------|-------|
| % of Online Aus | 18.5% |
| Average Streams | 207 |
| Average Time | 8:25 |

35-49

| | |
|-----------------|-------|
| % of Online Aus | 27.1% |
| Average Streams | 123 |
| Average Time | 6:23 |

50+

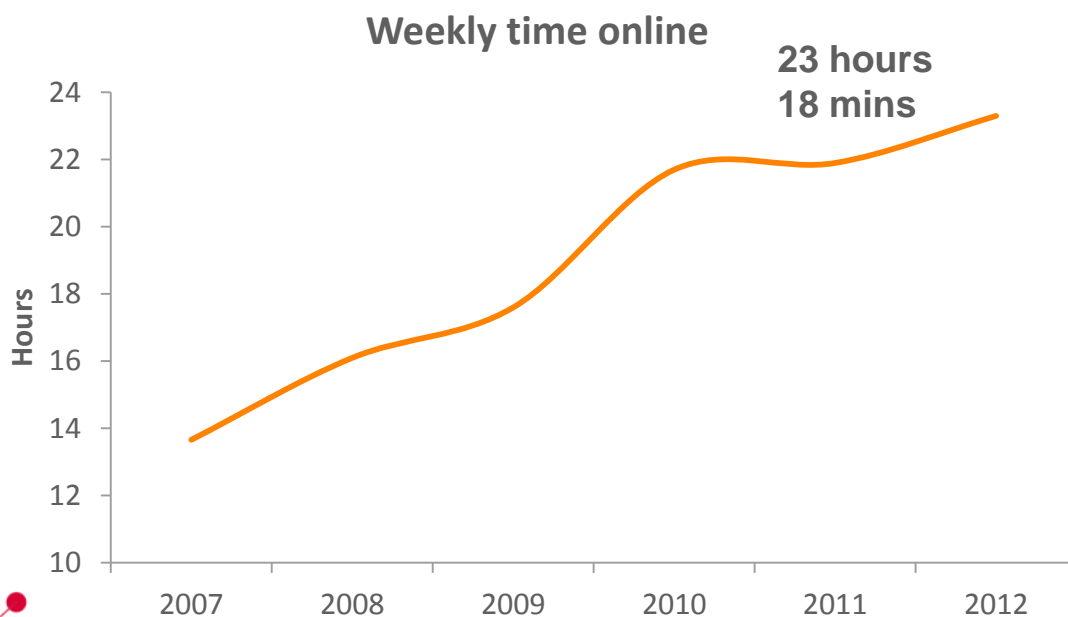
| | |
|-----------------|-------|
| % of Online Aus | 31.7% |
| Average Streams | 65 |
| Average PC Time | 3:18 |

Source: Nielsen VideoCensus January 2013



THE AUSTRALIAN CONNECTED CONSUMERS REPORT

WHEN LOOKING AT THE UNIVERSE OF ONLINE AUSTRALIANS WE SEE THEY SPEND NEARLY 24 HRS ONLINE EACH WEEK FROM MANY DEVICES



Broadcast TV

14:54 hrs

Time shifted TV

8:30 hrs



Radio

8:30 hrs



Printed newspaper

2:48 hrs

77%

Laptop

65%

72%

Desktop

68%

60%

Smartphone

38%



% of Australian ownership of each connected device
% of all online Australians using device to access the internet on a regular basis

44%

Games
console

7%

33%

Connected
TV
(Aggregated)

5%

31%

Tablet

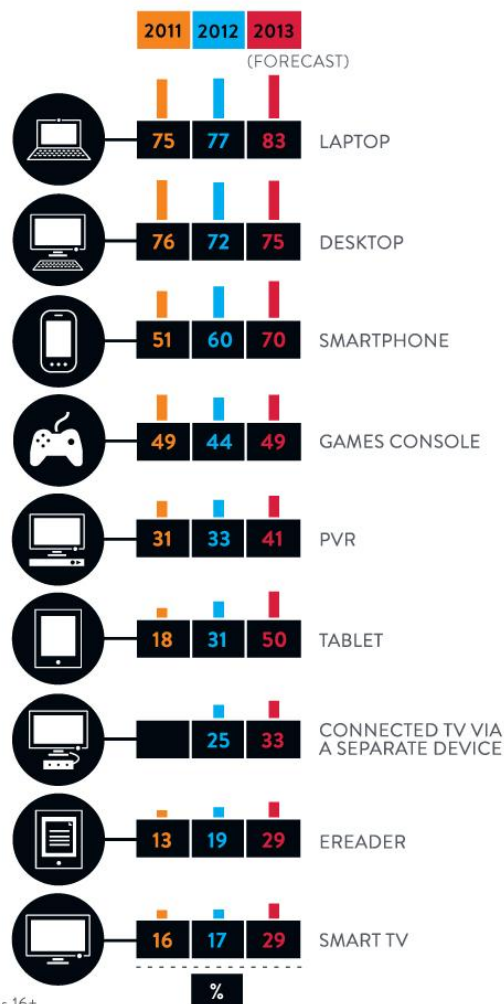
19%



MORE CONNECTED DEVICES AT OUR DISPOSAL

More Australian homes now have access to internet via their TV than via a tablet, with 33 percent of Australian homes having an TV that can connect to the internet vs. 31 percent with a tablet computer.

60% penetration of smartphones and 31% of homes have a tablet

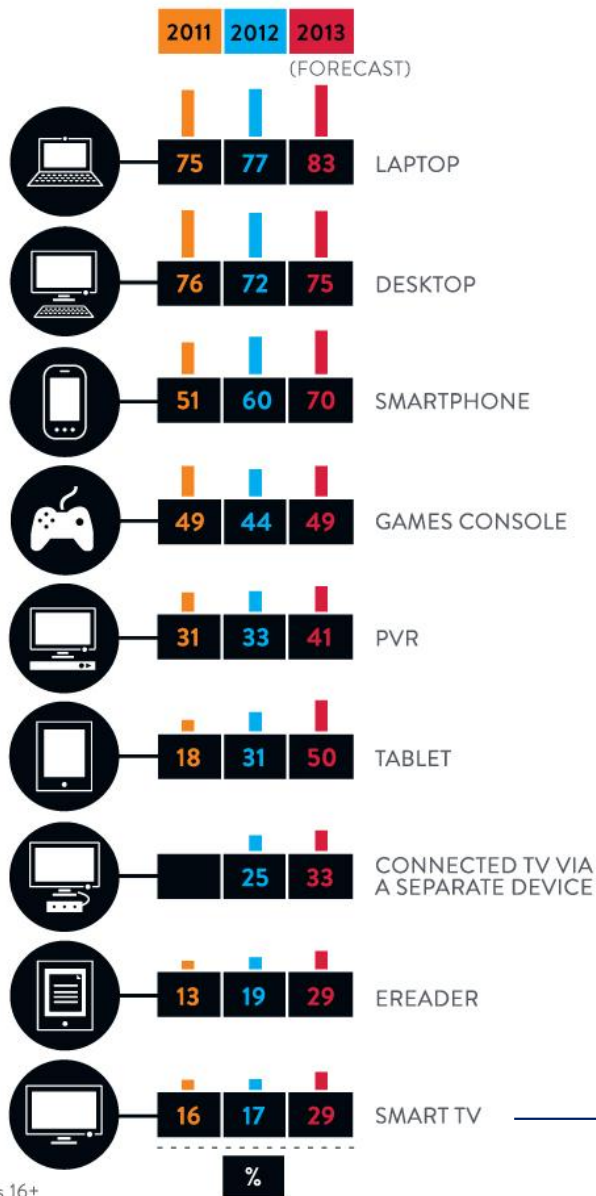


• All figures relate to household ownership with the exception of Smartphone which relates to personal ownership.

• 'Smart TV' 2010 and 2011 relates to 'Internet connected TV/Smart TV'.

BASE: All online Australians 16+

HOWEVER, CONNECTED TV SCREENS ARE UNDERUTILISED



• All figures relate to household ownership with the exception of Smartphone which relates to personal ownership.

• 'Smart TV' 2010 and 2011 relates to 'Internet connected TV/Smart TV'.

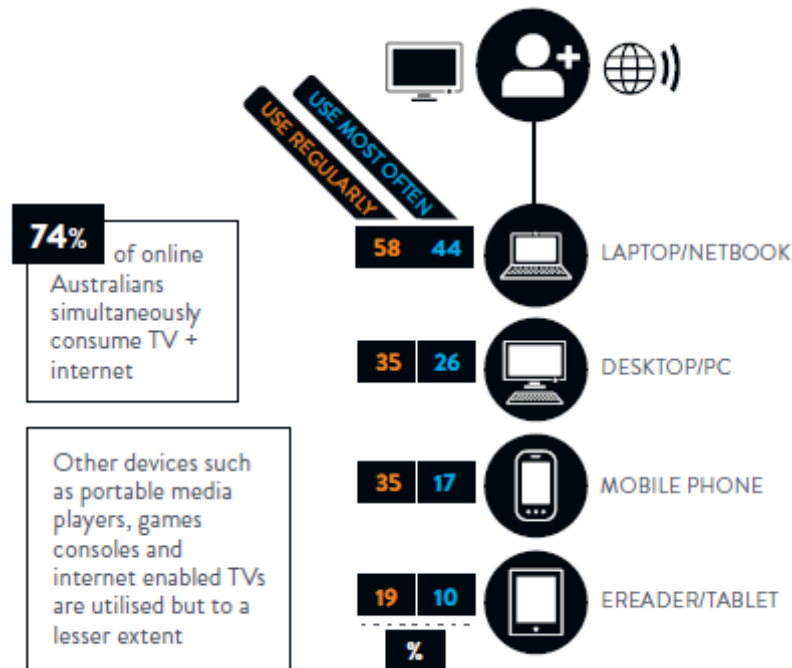


Less than half of households with internet available TV have accessed online content.

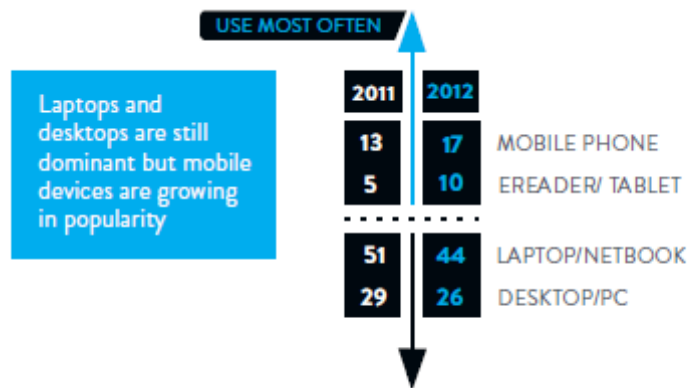
Key barriers:

- Lack of interest
- Lack of know-how
- User experience/connection speed
- Available content/apps not of interest

MOBILE DEVICES ARE POPULAR FOR MEDIA-MULTITASKING TV + INTERNET

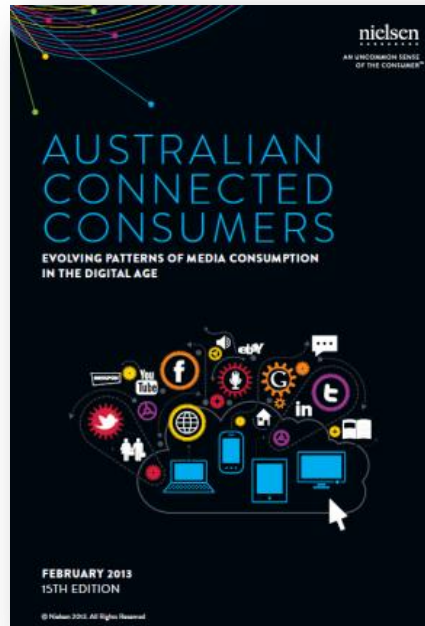


Dual screening increased from 60 percent in 2011 to 74 percent in 2012.



AUSTRALIAN CONNECTED CONSUMERS

The industry's annual thought-leading report of today and tomorrow's digital consumer



A must have guide for marketers to today and tomorrow's digitally savvy Australian consumers:



CONSUMER 360, MAY 1 – 3, 2013

CONSUMER 360

Nielsen's prestigious Consumer 360 Conference is hitting Pacific shores for the very first time. The conference will be held on May 1-3, 2013 at the beautifully refurbished, panoramic Fairmont Resort in the Blue Mountains.

We are uniquely placed to bring the brightest and most insightful uncommon thinkers together from Australia's biggest advertisers, retailers and media houses; and we are delighted to invite you join us to share, learn and inspire at this truly unique event.

Up to 20 highly-respected speakers and panelists have confirmed their place on the programme agenda; these industry trailblazers will share their Uncommon Thinking and bring to life ideas that illuminate consumer behaviour.

We also recently announced that Australian R&B-and-pop sensation Jessica Mauboy and her seven-piece band will be treating delegates to an exclusive performance at the gala dinner on the second evening of the conference.

Speakers, agenda and registrations
(Only 70 seats left!)

www.consumer360.com/pacific



nielsen

AN UNCOMMON SENSE
OF THE CONSUMER™

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