



nielsen

AUSTRALIAN ONLINE LANDSCAPE REVIEW

FEBRUARY 2013



STATE OF THE ONLINE LANDSCAPE – FEBRUARY 2013

Welcome to the February 2013 edition of the *Nielsen Australian Online Landscape Review*. This monthly review is a showcase of the latest unique audience trends, market statistics, gender demographics, top performing major categories, brands and sectors online.

The overall unique audience of 16.0 million online Australians was up by three per cent from January with 36 billion page views and 22 billion minutes spent online. This was despite February being a shorter month. Mobile usage for February recorded 363 million page views – a 95 per cent increase on the same time last year.

We continue to spotlight our VideoCensus service this month, providing valuable insights into the habits and demographics of Australians consuming video content online.

Also included in this edition is a snapshot of findings from our recently released *Australian Automotive Report 2012*. Research conducted for the report by Nielsen has shown that three quarters of Australian car buyers (73%) used online resources before buying a new or used car. This reminds us that the consumer in 2013 wants to be fully informed **before** they test drive a new or used vehicle. For manufacturers, this means they may need to win over potential consumers before they even leave the house. The *Australian Automotive Report 2012* is now available for purchase from your Nielsen Account Manager.

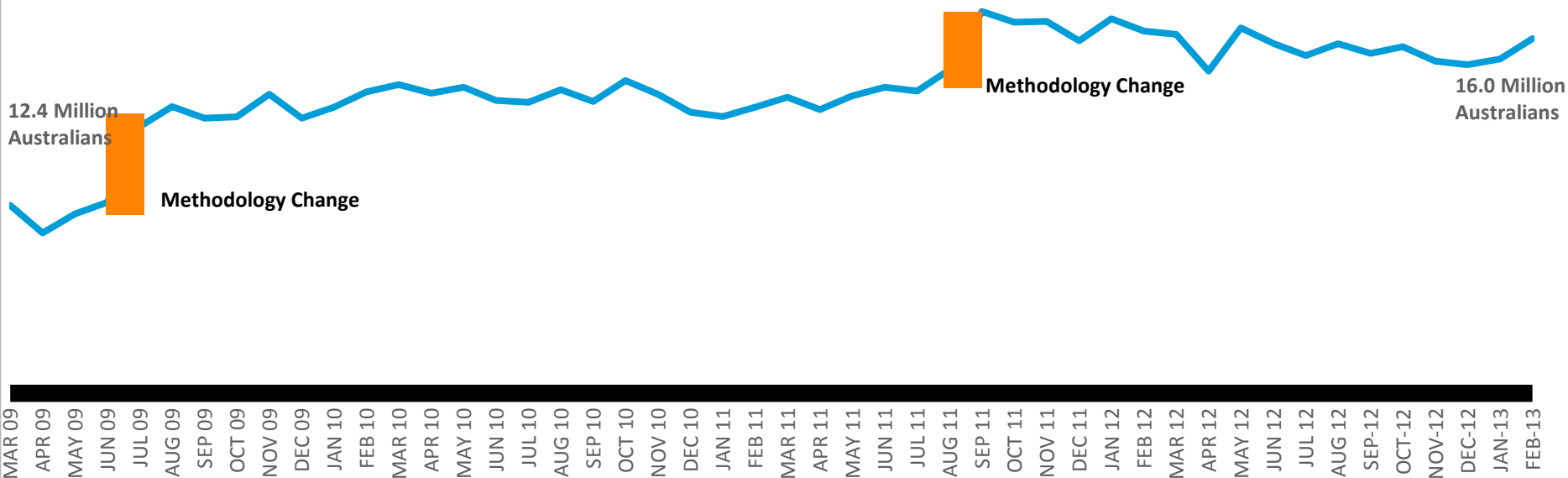
Finally, a reminder that our Consumer 360 event is growing by the week, with 22 speakers/panelists now confirmed and seats filling fast. Recent additions to the speaker list include representatives from Coles, Nestle, Pacific Magazines, Big Mobile and Nine Network. This is set to be a one-of-a-kind event and a valuable opportunity for all of our clients to attend.

Matt Bruce – Managing Director of Media, Nielsen

KEY ONLINE STATISTICS – FEBRUARY 2013



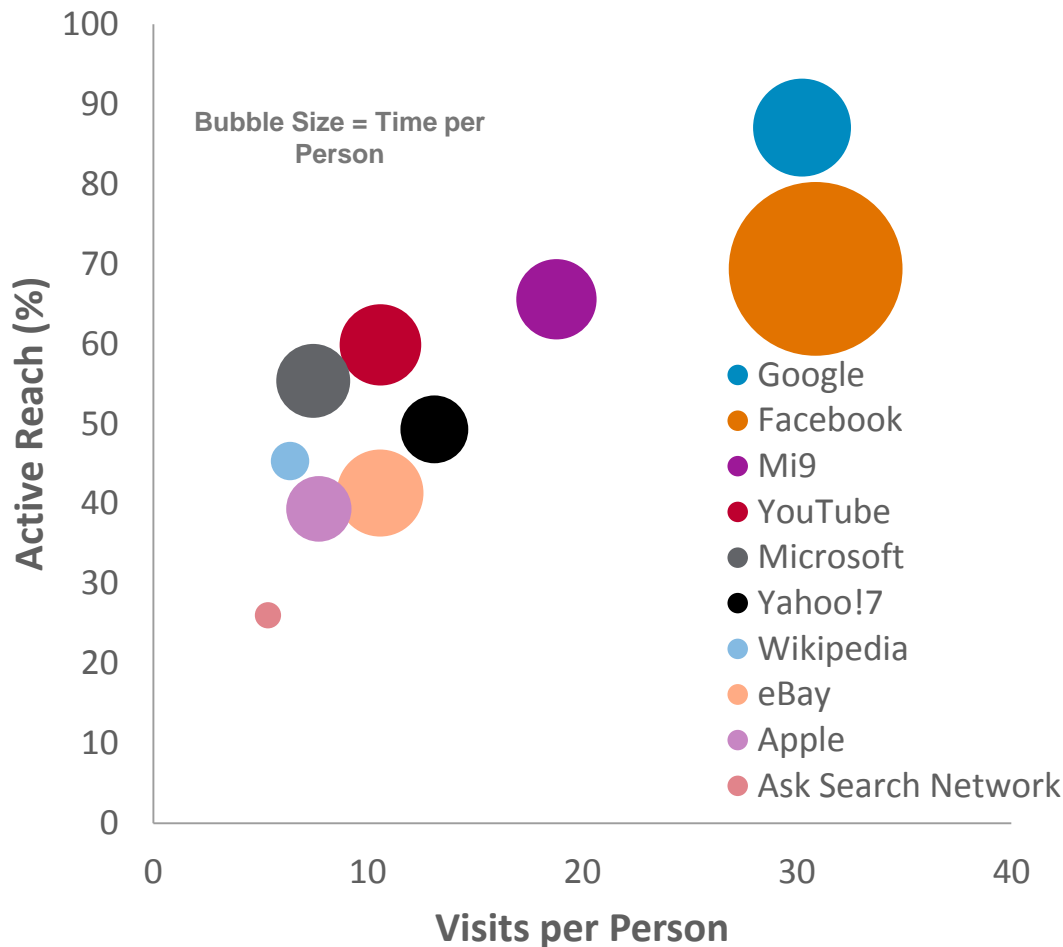
- 16.0 Million Australians online – Up 3% on January
- 36 Billion page views – Down 7% on January
- 22 Billion minutes spent – Down 6% on January



TOP 10 BRANDS – FEBRUARY 2013

Brands	Unique Audience (000's)	Page Views (000's)	Average Time Spent (HH:MM)	Audience Change Month on Month	Rank (Jan 13)
Google	13,926	3,358,421	2:04:48	4%	1
Facebook	11,096	5,654,427	6:33:31	-1%	2
Mi9	10,488	1,336,053	1:24:13	3%	3
YouTube	9,575	932,983	1:26:31	4%	4
Microsoft	8,856	39,243	1:11:06	10%	5
Yahoo!7	7,884	779,821	0:59:42	4%	6
Wikipedia	7,252	171,837	0:19:12	5%	7
eBay	6,611	1,236,470	1:38:21	2%	9
Apple	6,294	38,794	0:55:36	-3%	8
Ask Search Network	4,161	62,938	0:08:58	4%	12

TOP 10 BRANDS BY STICKINESS – FEBRUARY 2013



Brands	Visits Per Person	Active Reach	Time Per Person
Google	30.24	87.07	2:04:48
Facebook	27.79	69.38	6:33:31
Mi9	18.79	65.58	1:24:13
YouTube	10.59	59.87	1:26:31
Microsoft	7.46	55.37	1:11:06
Yahoo!7	13.10	49.30	0:59:42
Wikipedia	6.38	45.34	0:19:12
eBay	10.57	41.34	1:38:21
Apple	7.71	39.35	0:55:36
Ask Search Network	5.35	26.02	0:08:58

AGE DEMOGRAPHIC % BREAKDOWN – FEBRUARY 2013

2-17

% of Online Aus	8.1%
Average PV's	608
Average PC time	15:49

18-24

% of Online Aus	14.7%
Average PV's	2,424
Average PC time	59:15

25-34

% of Online Aus	17.5%
Average PV's	2,990
Average PC time	87:26

35-49

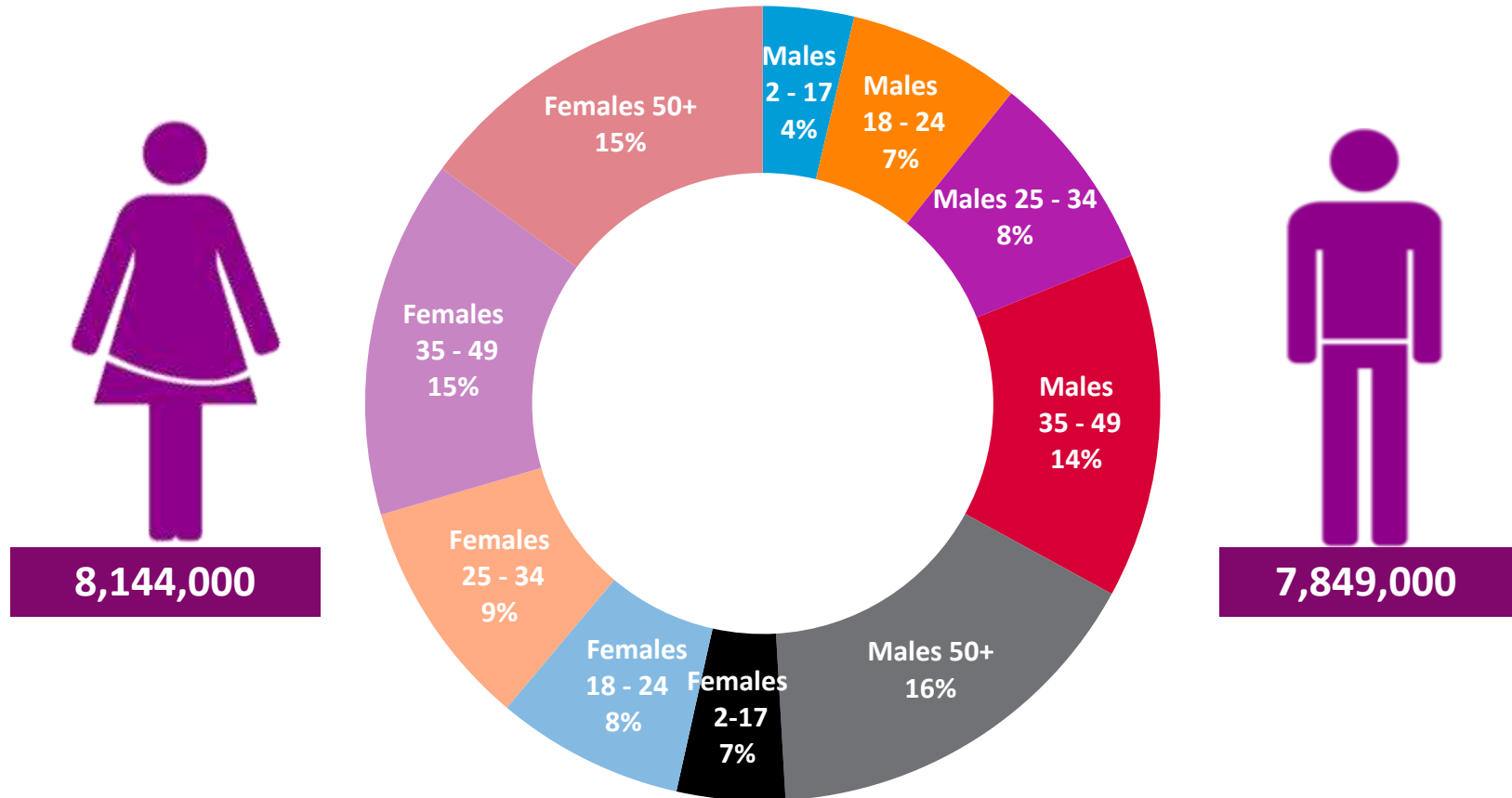
% of Online Aus	28.6%
Average PV's	2,634
Average PC time	82:26

50+

% of Online Aus	31.1%
Average PV's	2,220
Average PC time	75:28

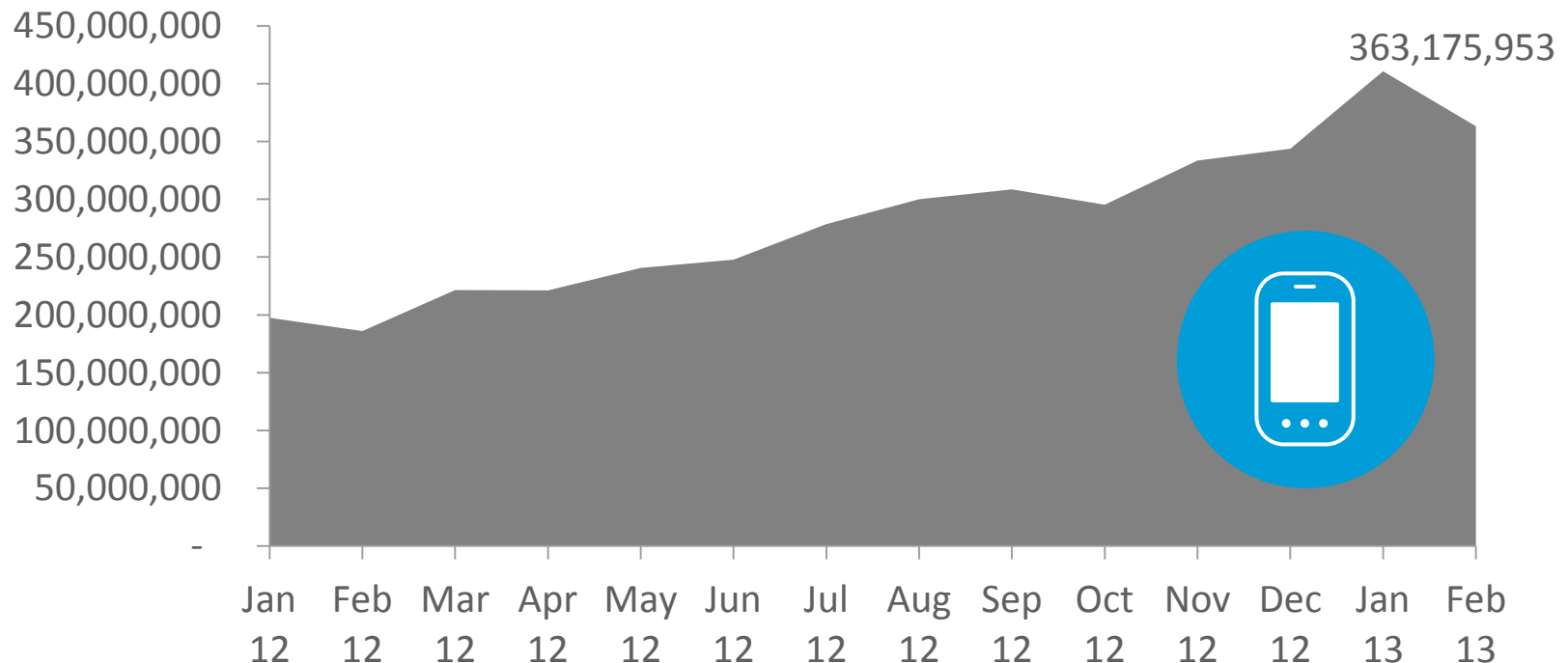
GENDER BREAKDOWN – FEBRUARY 2013

Number and percentage of online Australians by age group and gender



MOBILE PAGE VIEWS – FEBRUARY 2013

Mobile page views decreased by 12% from January 2013 (due to February being a shorter month) and has increased 95% since January 2012



An abstract graphic on the left side of the slide. It features a sphere-like shape composed of many thin, overlapping lines in various colors (red, green, blue, yellow). Several colored dots (yellow, pink, red) are placed on the surface of the sphere, with thin lines extending from them towards the right. The background is dark black.

SPOTLIGHT ON NIELSEN VIDEOCENSUS

VIDEOCENSUS – FEBRUARY 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 February 2013:

- **11.6 million** Australians streamed online videos
- A grand total of **1.59 billion** streams were viewed
- **4.3 billion** minutes were spent streaming content
- On average, Australians spent **6 hours** and **10 minutes** watching online video and viewed **137** streams



VIDEOCENSUS TOP 10 BRANDS – FEBRUARY 2013

Brands	Unique Audience (000s)	Total Streams (000s)	Average Time Spent (HH:MM)	Audience Change Month on Month	Rank (Jan 2013)
YouTube	9,973	1,128,563	04:52:45	2.5%	1
Facebook	4,339	39,693	00:22:21	18.2%	2
VEVO	2,286	38,386	00:37:00	-3.8%	3
MSN/Windows Live/Bing	2,064	26,421	00:26:29	2.9%	4
The CollegeHumor Network	1,878	5,561	00:09:56	15.0%	5
ABC Online Network	1,158	12,659	01:53:10	-1.3%	7
Yahoo!	1,139	5,675	00:13:04	-5.5%	6
news.com.au	1,017	6,427	00:07:31	41.6%	9
smh.com.au	857	4,320	00:05:45	-12.8%	8
Dailymotion	692	14,172	01:23:19	3.9%	10

VIDEOCENSUS: 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 viewed 15% more streams than females** - a swing back in favour to males, who in January 2013, were viewing an almost equal amount of streams as females.



5,727,000	Number of Streaming Australians	5,823,000
847,555,000	Total Number of Streams Viewed	738,993,000
148	Average Streams viewed per month	127
06:39	Average PC time per month (HH:MM)	05:42

VIDEOCENSUS AGE DEMOGRAPHIC % BREAKDOWN – FEBRUARY 2013

2-17

% of Online Aus	6.6%
Average Streams	117
Average Time	5:37

18-24

% of Online Aus	13.8%
Average Streams	263
Average Time	12:37

25-34

% of Online Aus	18.4%
Average Streams	214
Average Time	8:08

35-49

% of Online Aus	29.1%
Average Streams	112
Average Time	5:33

50+

% of Online Aus	32.0%
Average Streams	67
Average PC Time	2:56

An abstract graphic on the left side of the page features a series of overlapping, curved lines in various colors (red, green, blue, yellow) that create a sense of depth and movement, resembling a stylized globe or a complex data visualization. Several colored dots (yellow, green, purple, red) are placed at various points along these lines, with thin lines extending from them towards the right.

THE AUSTRALIAN AUTOMOTIVE REPORT 2012

AUSTRALIAN AUTOMOTIVE REPORT 2012

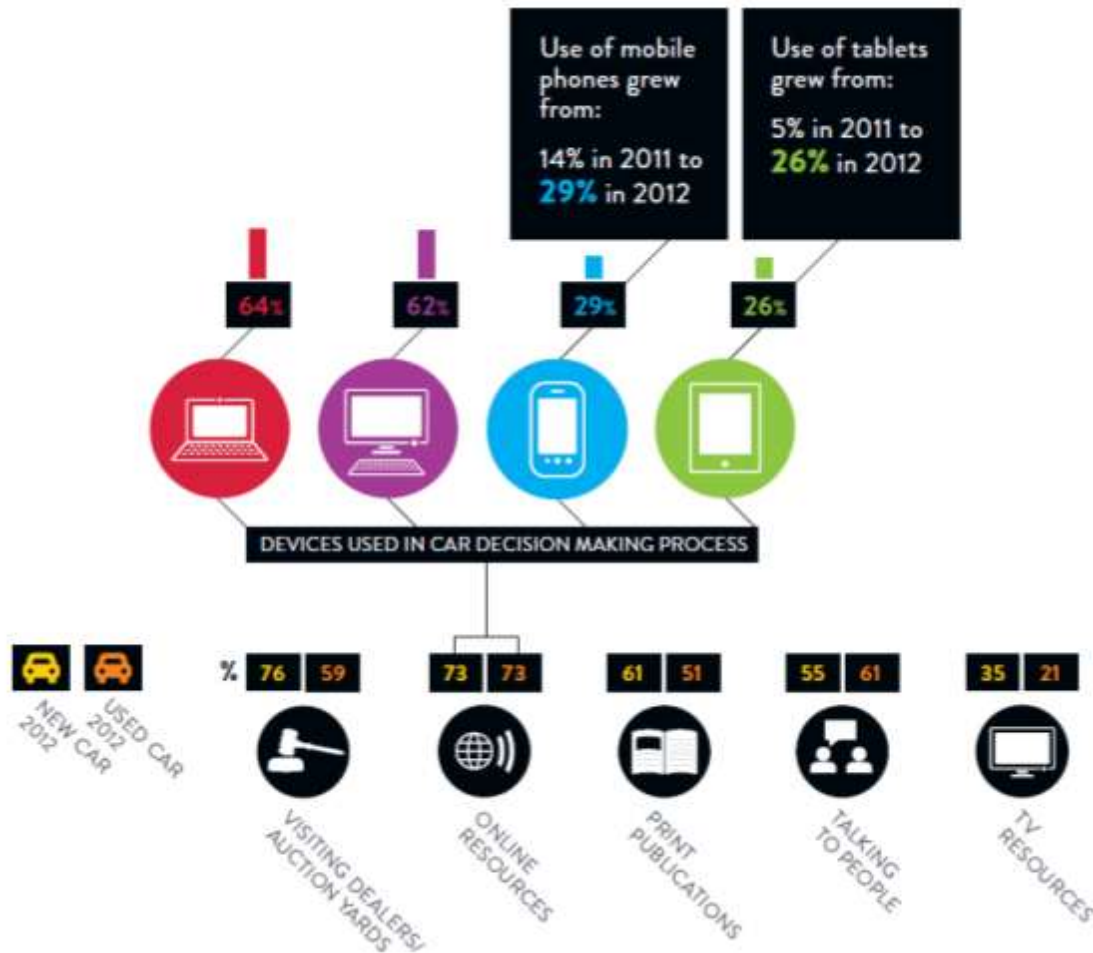
Nielsen's recently released Australian Automotive Report provides in-depth insights on consumers' interaction with information resources through each stage of the decision making process. It tracks how consumers change their sources of information as they get closer to a decision.

This year's report highlighted the following:

- **Almost 3 in 4 car buyers (73%) use online resources when searching for a car.**
- **Close to 1 in 3 (29%) used their mobile phone**
- **1 in 4 used social media.**



CAR SHOPPING IS DONE ONLINE



73% of people searching for a car in 2012 did so online.

They were less likely to visit a dealership in person when looking for a used car, with only 59% of people doing so.

The use of **mobile phones** in the car decision making process more than doubled to **29%**, while **tablet use** increased **five-fold** to **26%**.

An abstract graphic on the left side of the page. It features a series of concentric, overlapping lines that form a cone-like shape. The lines are colored in a spectrum of colors including red, orange, yellow, green, and blue. Several small, colored dots (yellow, green, pink, red) are scattered across the lines, with thin lines connecting some of them.

CONSUMER 360

MAY 1-3, 2013



JOIN US FOR THE FIRST CONSUMER 360 EVENT IN THE PACIFIC

FAIRMONT RESORT, BLUE MOUNTAINS • 1-3 MAY, 2013

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.

Join us as we listen to the brightest and most insightful advertisers, retailers and media houses share their approach to gaining an uncommon insight of their consumers' behaviour.

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:



MYER



consumer360.com/pacific