



nielsen

# AUSTRALIAN ONLINE LANDSCAPE REVIEW

MARCH 2013



# STATE OF THE ONLINE LANDSCAPE – MARCH 2013

In this March 2013 edition of the Nielsen Australian Online Landscape Review, we share the latest unique audience trends; including market statistics, gender demographics and top brands.

The overall unique audience of 15.7 million online Australians was down slightly on February however engagement metrics were up overall, with 39 billion page views and 24 billion minutes spent online.

## Mobile Usage

Mobile usage increased in March due largely to the slightly longer month, returning to January levels with mobile page views sitting at just under 400 million. This represents a 10 percent change month-on-month and overall growth of 102 percent since January 2012.

## New Interface and Device Module

We are also delighted to announce that the new 'Digital Content Measurement' interface will be launched April 27 for VideoCensus (now called 'streaming') data. This will be followed with the migration of our Online Ratings (now called 'surfing') data into this new interface from June. Training will commence on the new interface shortly.

The new device module within Market Intelligence, which enables reporting by device type and operating system, will be available from May 1. For the first time there will be reporting across all sites and categories in Market Intelligence on whether consumers are accessing content by Computer, Mobile, Tablet, Console or Other devices. Additionally, you'll be able to see which operating system mobile viewers are using, whether it be iOS , Android or other platforms.

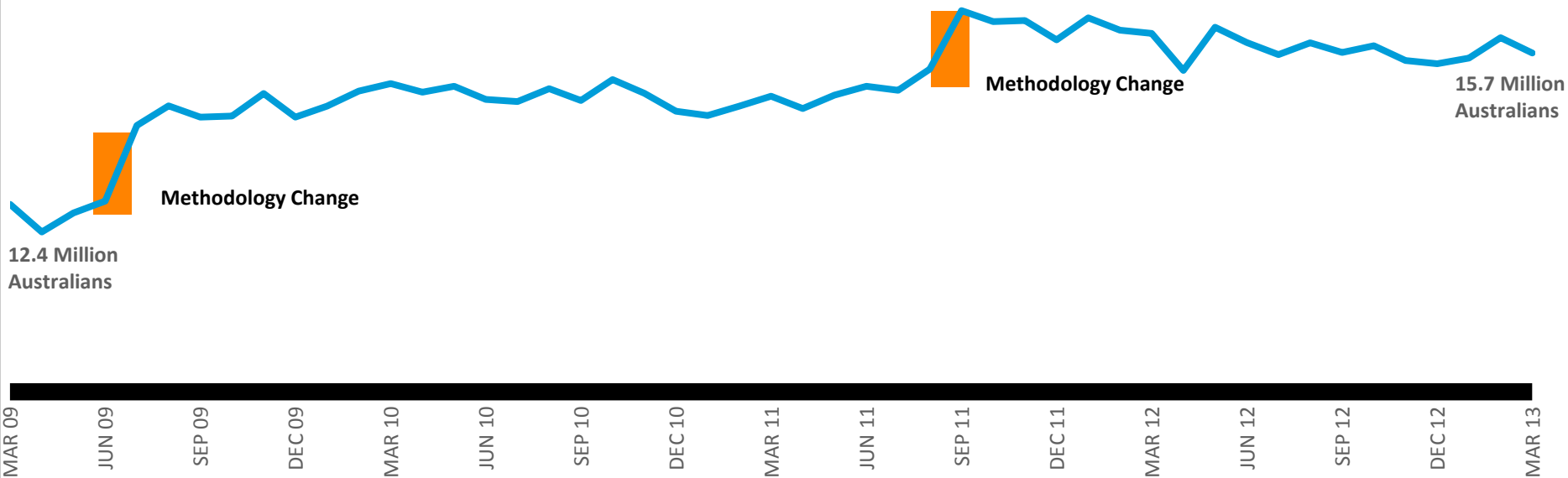
Finally, registration for our Consumer 360 event is now in its final days. We have brought together some of the smartest and most insightful business thinkers from amongst Australia's biggest advertisers, retailers and media publishers; we are delighted to invite you to join us and share, learn and inspire at this truly unique event.

<http://www.consumer360.com/locations/pacific/>

## KEY ONLINE STATISTICS – MARCH 2013



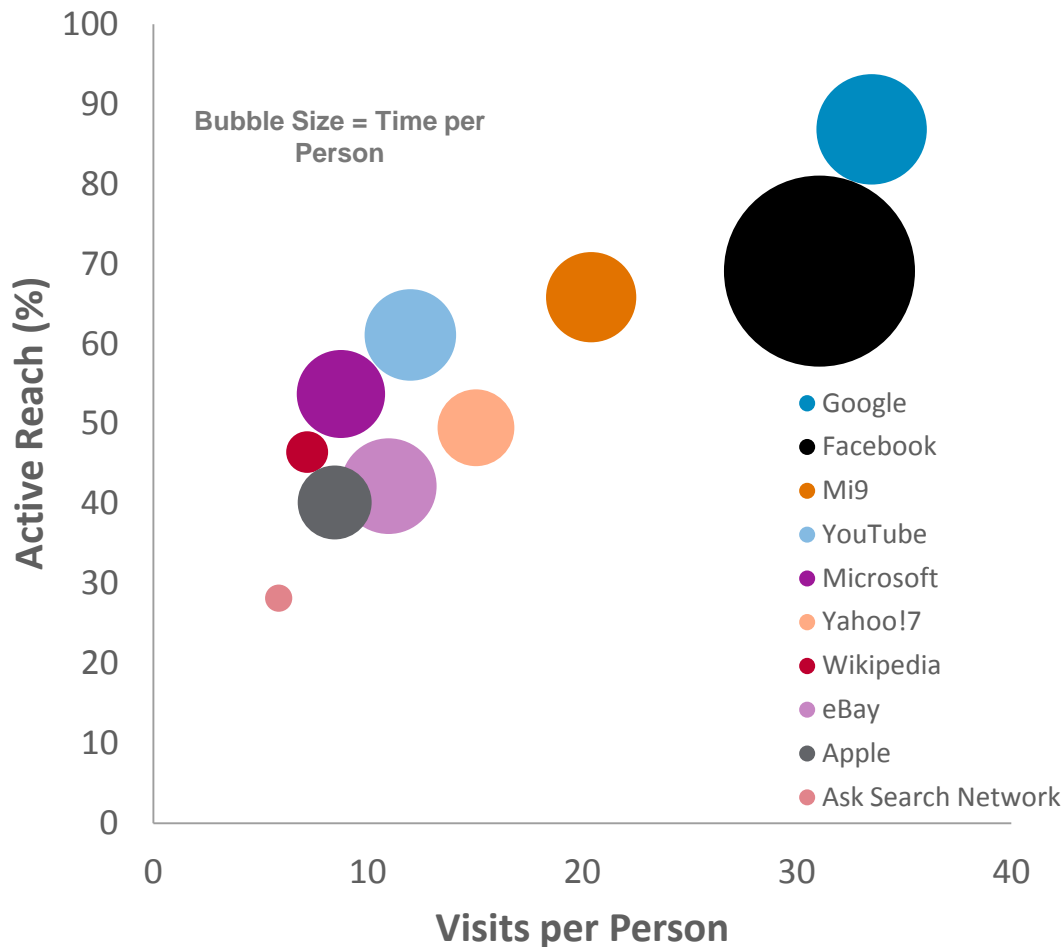
- 15.7 Million Australians online – Down 2% on February
- 39 Billion page views – Up 8% on February
- 24 Billion minutes spent – Up 9% on February



## TOP 10 BRANDS – MARCH 2013

Brands	Unique Audience (000's)	Page Views (000's)	Average Time Spent (HH:MM:SS)	Audience Change Month on Month	Rank (Feb 13)
Google	13,587	3,597,623	2:20:31	2%	1
Facebook	10,813	5,810,348	7:00:38	3%	2
Mi9	10,301	1,288,399	1:33:53	2%	3
YouTube	9,562	1,045,535	1:36:53	0.1%	4
Microsoft	8,406	45,988	1:29:47	5%	5
Yahoo!7	7,746	835,728	1:07:42	2%	6
Wikipedia	7,272	172,899	0:20:02	0.2%	7
eBay	6,602	1,333,395	1:46:23	0.1%	8
Apple	6,280	40,135	1:02:56	0.2%	9
Ask Search Network	4,406	69,343	0:08:32	6%	10

# TOP 10 BRANDS BY STICKINESS – MARCH 2013



Brands	Visits Per Person	Active Reach	Time Per Person
Google	33.48	86.82	2:20:31
Facebook	31.05	69.09	7:00:38
Mi9	20.41	65.82	1:33:53
YouTube	11.98	61.10	1:36:53
Microsoft	8.74	53.71	1:29:47
Yahoo!7	15.04	49.49	1:07:42
Wikipedia	7.17	46.46	0:20:02
eBay	10.96	42.18	1:46:23
Apple	8.45	40.13	1:02:56
Ask Search Network	5.84	28.15	0:08:32

# AGE DEMOGRAPHIC % BREAKDOWN – MARCH 2013

## 2-17

% of Online Aus	8.1%
Average PV's	769
Average PC time	19:19

## 18-24

% of Online Aus	15.1%
Average PV's	2,584
Average PC time	68:29

## 25-34

% of Online Aus	18%
Average PV's	3,222
Average PC time	92:40

## 35-49

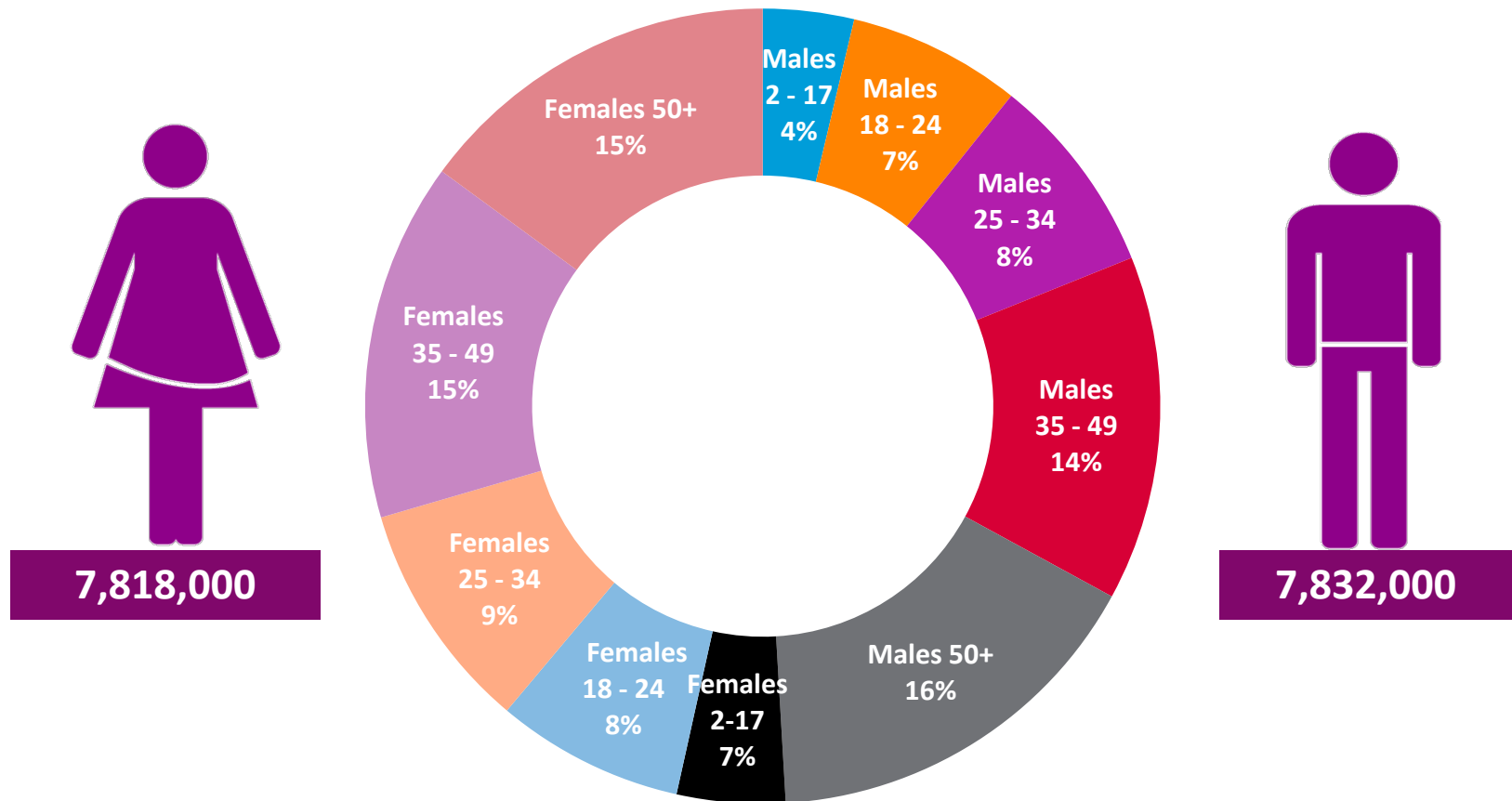
% of Online Aus	28.2%
Average PV's	2,933
Average PC time	89:38

## 50+

% of Online Aus	30.7%
Average PV's	2,538
Average PC time	83:42

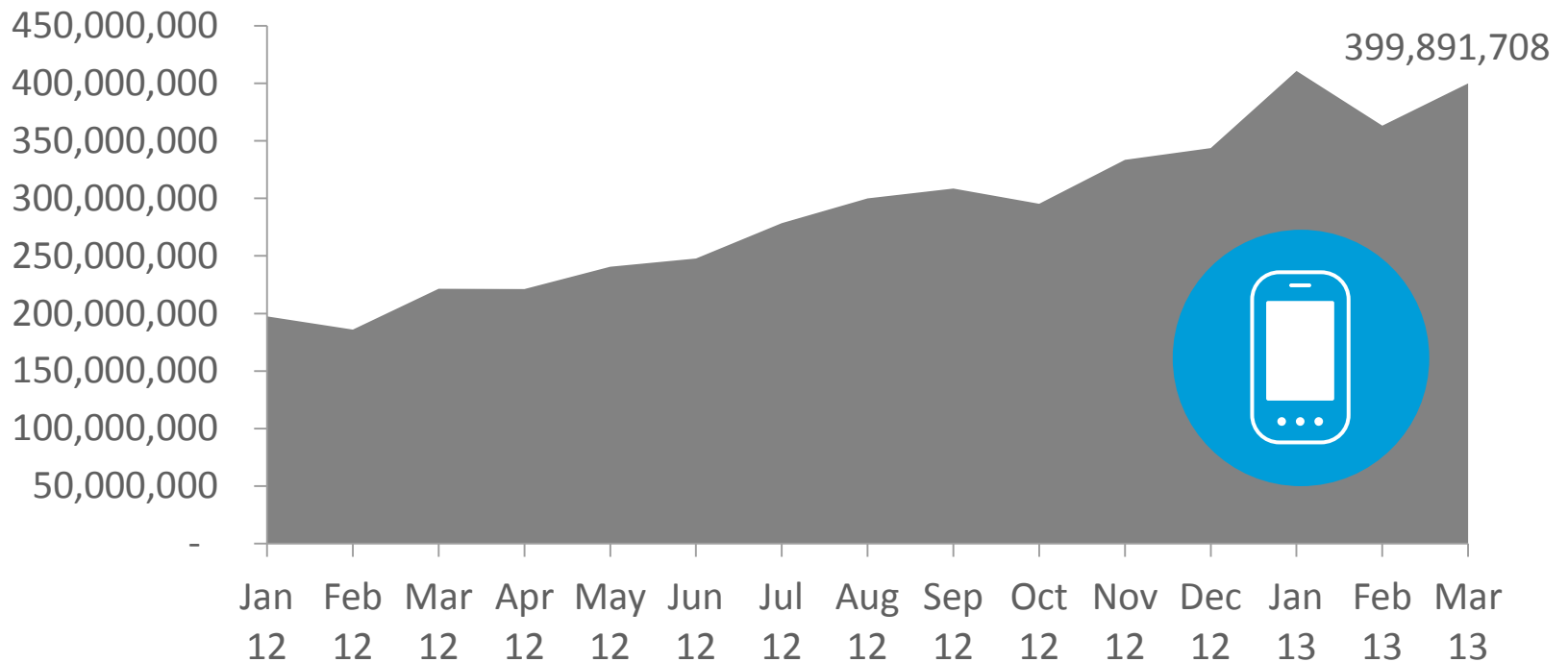
# GENDER BREAKDOWN – MARCH 2013

Number and percentage of online Australians by age group and gender

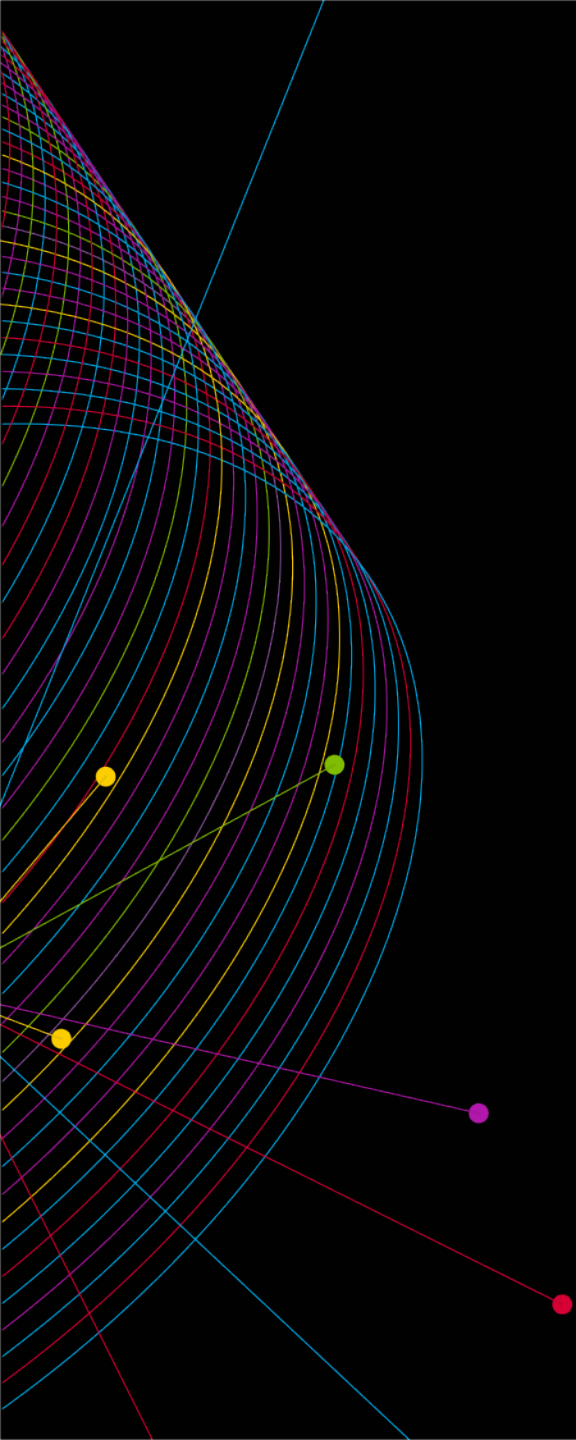


## MOBILE PAGE VIEWS – MARCH 2013

Mobile Page views increased by 10% from February 2013 and has increased 102.5% since January 2012







# NIELSEN VIDEOCENSUS

## VIDEOCENSUS – MARCH 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 March 2013:

- **11.5 million** Australians streamed online videos
- A grand total of **1.77 billion** streams were viewed
- **5.02 billion** minutes were spent streaming content
- On average, Australians spent **7 hours** and **17 minutes** watching online video and viewed **154** streams



## VIDEOCENSUS TOP 10 BRANDS – MARCH 2013

Brands	Unique Audience (000s)	Total Streams (000s)	Average Time Spent (HH:MM:SS)	Audience Change Month on Month	Rank (Jan 2013)
YouTube	10,009	1,363,511	05:48:45	0.36%	1
Facebook	4,024	35,720	00:19:59	-7.26%	2
VEVO	2,485	43,659	00:38:55	8.74%	3
MSN/Windows Live/Bing	2,316	29,512	00:34:43	12.24%	4
The CollegeHumor Network	1,316	3,070	00:08:22	-27.52%	5
Yahoo!	1,220	5,779	0:12:24	7.3%	7
ABC Online Network	1,190	12,024	01:53:46	2.82%	6
news.com.au	1,250	6,478	00:07:47	13.15%	8
smh.com.au	858	4,265	00:08:00	0.12%	9
Dailymotion	818	16,220	01:35:23	18.2%	10

## VIDEOCENSUS: GENDER BREAKDOWN

In terms of the total number of video streaming Australians last month, there were 375,000 more males than females. In engagement terms **males viewed significantly more streams (37%) than females** – an increase of approx. 20% on February 2013. Females also experienced slight growth in stream views month-on-month.



5,928,000	Number of Streaming Australians	5,553,000
1,019,811,000	Total Number of Streams Viewed	745,936,000
172	Average Streams viewed per month	134
07:32	Average PC time per month (HH:MM)	07:01

# VIDEOCENSUS AGE DEMOGRAPHIC % BREAKDOWN – MARCH 2013

## 2-17

% of Online Aus	7%
Average Streams	136
Average Time	5:57

## 18-24

% of Online Aus	15%
Average Streams	309
Average Time	14:55

## 25-34

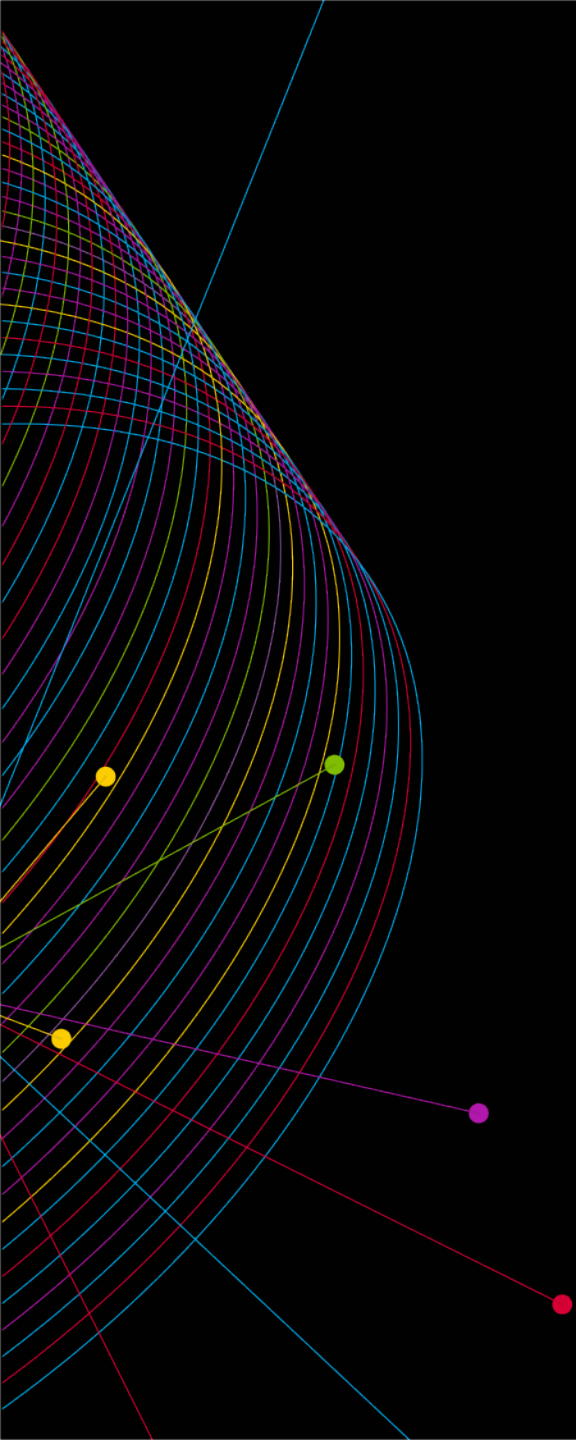
% of Online Aus	18%
Average Streams	187
Average Time	8:29

## 35-49

% of Online Aus	29%
Average Streams	139
Average Time	6:48

## 50+

% of Online Aus	31%
Average Streams	77
Average PC Time	3:38



# NEW USER INTERFACE

# NIELSEN ANNOUNCES ENHANCED USER INTERFACE

Digital Content Measurement is the newly developed user interface served on Nielsen's MediaView platform – which will integrate Nielsen's online audience measurement services.

This enhanced user interface will provide one single platform for surfing and streaming data, with improved usability and enhanced customisation capabilities.

The new interface will replace the current VideoCensus interface upon launch on April 27 and become the new interface for Nielsen Online Ratings from June 2013.

As of April 27, when you log on to VideoCensus, you will automatically see the enhanced interface hosting your VideoCensus (streaming) data.

**Note: Training sessions on the new interface will commence in April, with sessions/dates to be distributed to clients w/c 29<sup>th</sup> April.**

**Contact your Nielsen Account Manager or call 02 8873 7000 for more information or if you would like to request earlier training.**

# NEW INTERFACE (VIDEOCENSUS)

The main enhancement is with the Report Builder screen, where all steps to complete the construction of a report are viewable on the one screen

The screenshot displays the 'Report Builder' interface for 'Standard Metrics\_NewReport'. The interface is organized into several panels:

- Product Navigator:** A dropdown menu currently set to 'Digital Content Measurement'.
- Report Navigator:** A list of report types including 'Quick Reports' and 'Standard Reports' (which is highlighted).
- Saved Templates:** A section with a 'Folders' icon and a list containing 'Default Folder' and 'Deleted Specs'.
- Report Name:** A text field containing 'Standard Metrics\_NewReport' with a gear icon for settings.
- Buttons:** 'Set Default', 'Save Template', and 'Submit' buttons are located in the top right of the main area.
- Report Layout:** A panel with radio button options: 'Standard Metrics' (selected), 'Duplication', 'Audience Profile', 'Trend', 'Daypart', and 'Reach/Frequency'.
- Targets:** A panel with an 'All Demographics' checkbox.
- Selections:** A panel with dropdown menus for 'Country' (Australia), 'Audience' (Total), 'Measurement Period' (Mar 2013), and 'Dataset' (Streaming). A calendar icon is next to the 'Measurement Period' dropdown.
- Metrics:** A panel with a 'Unique Audience (000)' label.
- Entitles - Standard Metrics:** A panel with a star icon and an 'Enable Hierarchy Reporting' checkbox.

The top navigation bar includes 'Report Manager', 'Report Builder' (active), 'Report Viewer', 'User Preferences', and 'Help'.

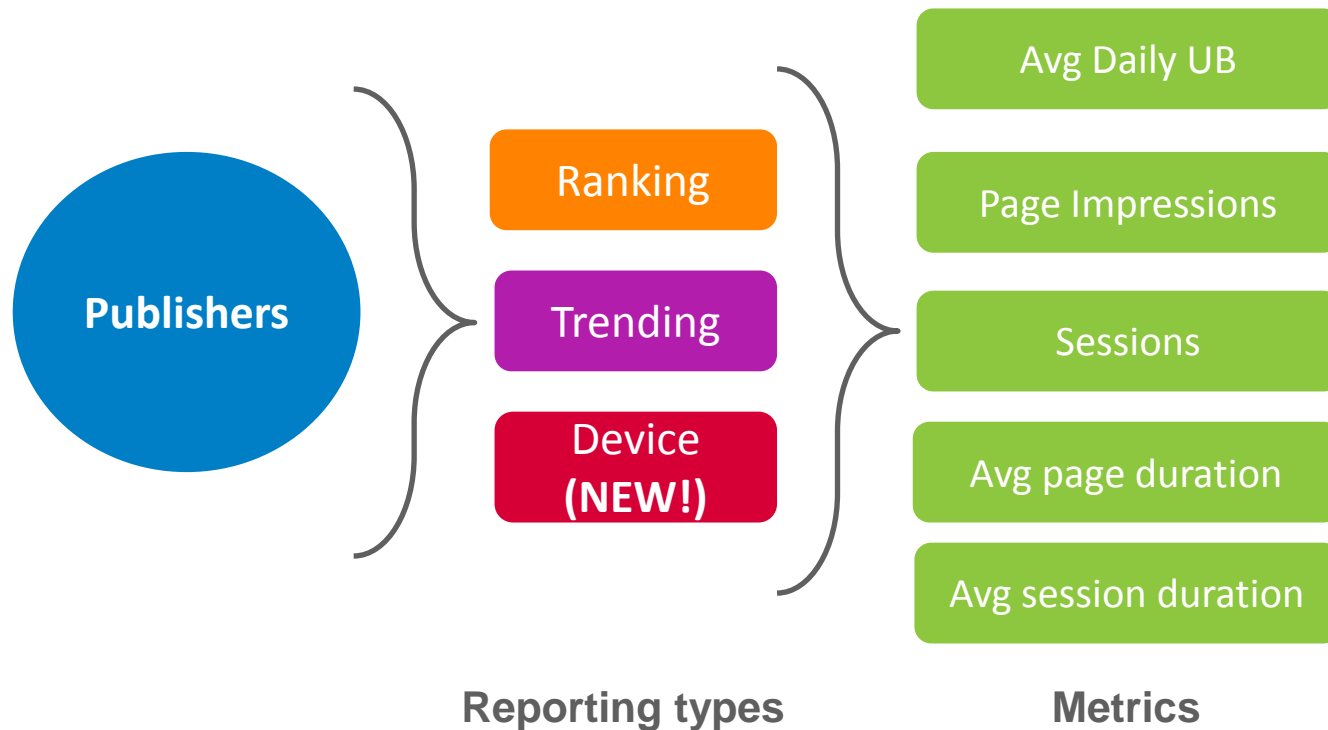


An abstract graphic on the left side of the slide. It features a series of concentric, curved lines that form a partial sphere or dome shape. The lines are colored in a gradient from cyan to magenta. Several colored dots (yellow, pink, red) are placed on the surface of the sphere, with thin lines extending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

# MARKET INTELLIGENCE UPDATE DEVICE + MOBILE MODULE

# INTRODUCING THE MARKET INTELLIGENCE DEVICE MODULE

From May 1, you'll be able to understand traffic behaviours across multiple device types, with the launch of the **Device Module** within Market Intelligence. We'll be in touch to provide demonstrations and training soon.



**From May 1**

# PRACTICAL USES OF THE DEVICE MODULE



Understand visitor sessions to a site by device type and trend this over time.



Rank sites by impression inventory on mobile or tablet devices.



Understand the nuances of competing audiences by operating system - is it iOS or android for your competition? Tablet or mobile?



Understand category differences for device access - is entertainment content consumed more on tablets than news or sport content?



# WHERE TO FIND THE DEVICE MODULE

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The screenshot displays the Nielsen SiteCensus Market Intelligence interface. The 'Device' tab is highlighted with a red circle and labeled 'NEW TAB'. Below the navigation bar, the 'Generate Report' section is visible, containing several steps for report configuration:

- 1. Select report period : Daily, Weekly, Monthly
- 2. Including date: From: 01/10/10
- 3. Select report type : By Brand, By Publisher, By Category, By Category Sites, All Sites
- 4. Select brand (Up to): Market Aggregate, 247girl.co.nz, 3news.co.nz, aa.co.nz, aainsurance.co.n, aalife.co.nz, aamaps.co.nz, aasmadwatch.co
- 5. Select data : Website, streaming
- 6. Select device report type : Select Report Type
- 7. Select device type : Select Device Type

Annotations highlight new features:

- New report options:**
  - Device Operating System
  - Device Type
  - Device Type Vs Operating System
- Select device type:**
  - Computer
  - Mobile
  - Tablet
  - Console
  - Other
  - Unclassified

The 'Select device report type' and 'Select device type' dropdowns are circled in red and labeled 'NEW FILTERS'.

We're excited to join you at Consumer 360 in the Blue Mountains next week. For the latest update of speakers and attendees, click to view the video below.



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