



nielsen

AUSTRALIAN ONLINE LANDSCAPE REVIEW

APRIL 2013



STATE OF THE ONLINE LANDSCAPE – APRIL 2013

In this April 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 consistent with March, however engagement metrics were down overall, with 36 billion page views and 23 billion minutes spent online in April, down eight percent and five percent respectively compared with March. We believe that school holidays during April may have impacted total usage.

Mobile usage increased slightly in April, reaching its second-highest level ever with mobile page views sitting at just over 406 million. This represents overall growth of 106 percent since January 2012.

Market Intelligence Device Module

The new Device Module within Nielsen's Market Intelligence, which enables reporting by device type and operating system, launched on May 1. Some preliminary findings during the first two weeks of May include the following:

- **25 percent of all sessions were generated from mobile phones**
- **Tablets accounted for nine percent of all sessions**
- **The largest share remained with computers which accounted for 65 percent of sessions**

While Mobile devices accounted for a quarter of all sessions, it only accounted for 14 percent of page impression traffic, reflecting the shorter, more functional sessions that tend to occur on a phone. The larger screens gain a higher page impression engagement at this aggregate level – computers generate 76 percent of all page impressions and tablet gain nine percent.

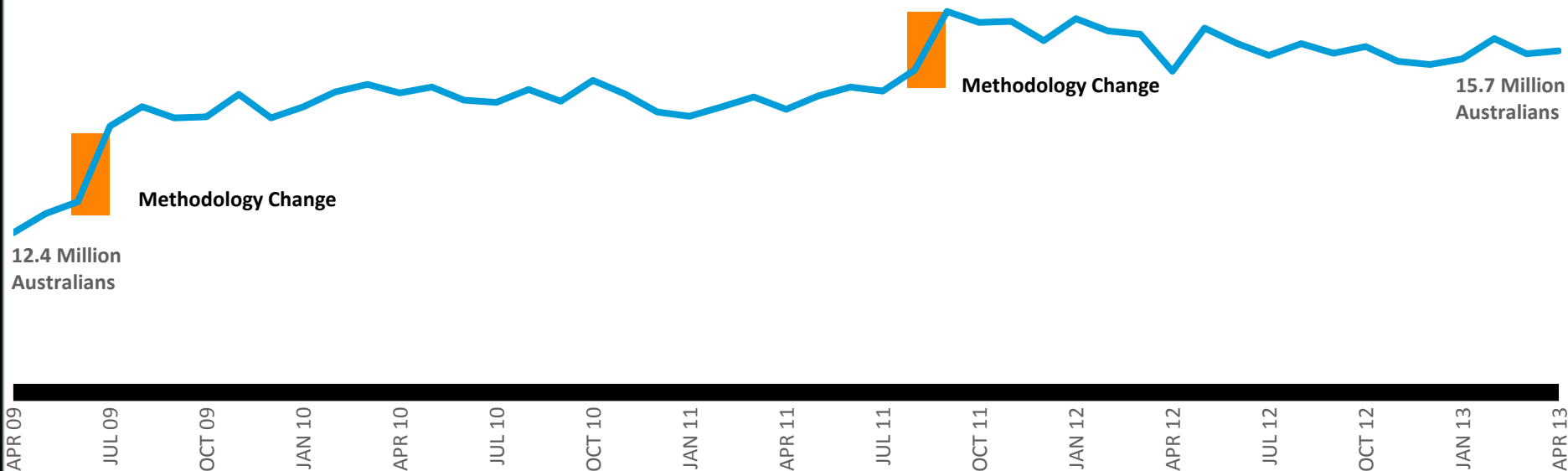
With a number of developments and improvements to Nielsen's audience measurement tools, I invite clients to attend one of Nielsen's regular training events. This is an ideal way to familiarise yourself with what's available and to ask any questions about how we measure online audiences in Australia.

Matt Bruce – Managing Director of Media, Nielsen

KEY ONLINE STATISTICS – APRIL 2013



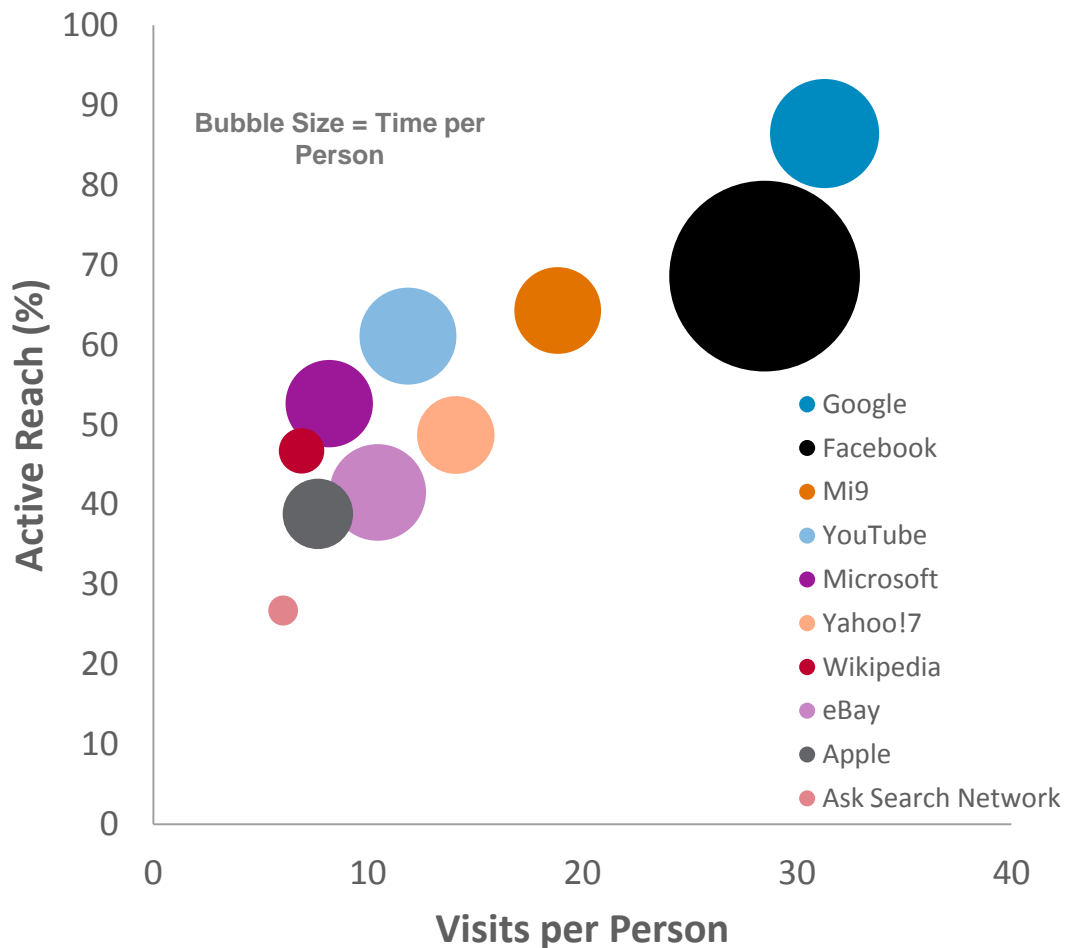
- 15.7 Million Australians online – Consistent with March
- 36.1 Billion page views – down eight percent on March
- 22.9 Billion minutes spent – down five percent on March



TOP 10 BRANDS – APRIL 2013

Brands	Unique Audience (000's)	Page Views (000's)	Average Time Spent (HH:MM:SS)	Audience Change Month on Month	Rank (Mar 13)
Google	13,578	3,374,531	2:11:45	-0.06%	1
Facebook	10,776	5,158,863	6:43:16	-0.3%	2
Mi9	10,101	1,057,242	1:23:13	-1.9%	3
YouTube	9,598	1,153,450	1:44:25	0.4%	4
Microsoft	8,273	42,991	1:24:27	-1.6%	5
Yahoo!7	7,651	817,529	1:06:37	-1.2%	6
Wikipedia	7,342	201,897	0:22:43	1.0%	7
eBay	6,522	1,198,237	1:43:10	-1.2%	8
Apple	6,105	34,847	0:54:46	-2.8%	9
Ask Search Network	4,201	68,778	0:09:59	-4.7%	10

TOP 10 BRANDS BY STICKINESS – APRIL 2013



Brands	Visits Per Person	Active Reach	Time Per Person
Google	31.29	86.42	2:11:45
Facebook	28.49	68.59	6:43:16
Mi9	18.85	64.29	1:23:13
YouTube	11.87	61.09	1:44:25
Microsoft	8.20	52.65	1:24:27
Yahoo!7	14.10	48.70	1:06:37
Wikipedia	6.91	46.73	0:22:43
eBay	10.46	41.51	1:43:10
Apple	7.67	38.85	0:54:46
Ask Search Network	6.05	26.74	0:09:59

AGE DEMOGRAPHIC % BREAKDOWN – APRIL 2013

2-17

% of Online Aus	8%
Average page views	743
Average PC time (H:MM)	19:30

18-24

% of Online Aus	16.4%
Average page views	2,471
Average PC time (H:MM)	63:24

25-34

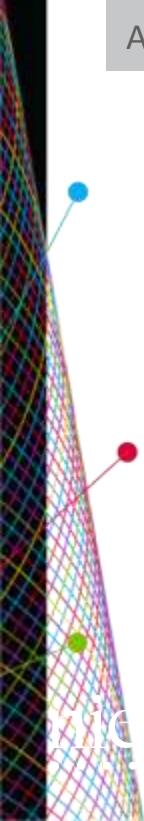
% of Online Aus	17.7%
Average Page views	2,932
Average PC time (H:MM)	89:38

35-49

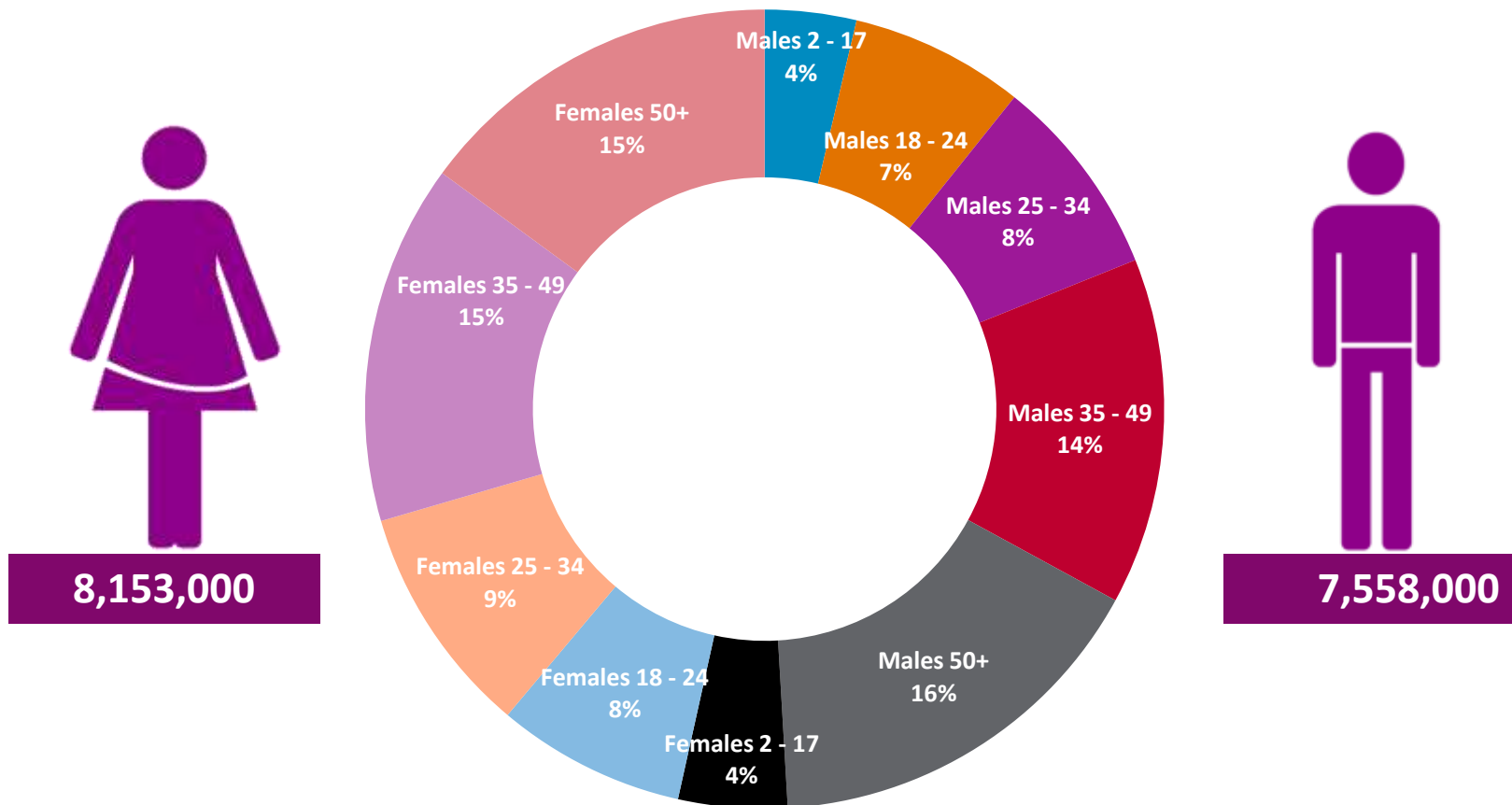
% of Online Aus	27.5%
Average PV's	2,714
Average PC time (H:MM)	86:14

50+

% of Online Aus	30.5%
Average PV's	2,292
Average PC time (H:MM)	79:49

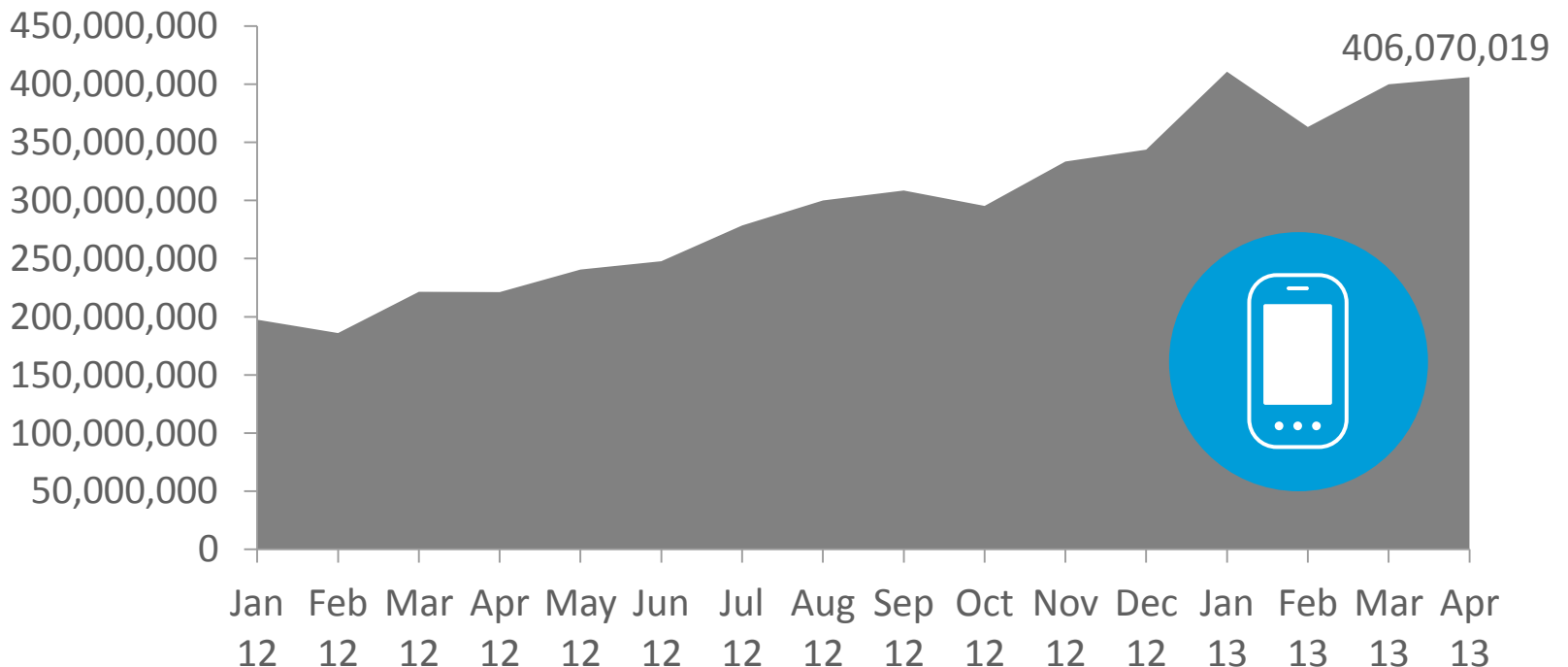


GENDER BREAKDOWN – APRIL 2013



MOBILE PAGE VIEWS – APRIL 2013

Mobile page views increased by two percent from March 2013 and has increased 106 percent since January 2012



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

NIELSEN DIGITAL CONTENT MEASUREMENT - VIDEO STREAMING

VIDEO STREAMING – APRIL 2013

In the month of April 2013:

- **11.6 million** Australians streamed online videos
- A total of **1.85 billion** streams were viewed
- **5.13 billion** minutes were spent streaming content
- On average, Australians spent **7 hours** and **22 minutes** watching online video and viewed **160** streams



VIDEO STREAMING TOP 10 – APRIL 2013

Dailymotion - Europe's largest video sharing website - has grown its Australian audience 29 percent since February, driven by a jump in users aged 16-24. The site, with a 70 percent male audience, is behind only Youtube and ABC Online for average time per spent at almost 1 hour 12 minutes.

Brands	Unique Audience (000s)	Total Streams (000s)	Average Time Spent (HH:MM:SS)	Audience Change Month on Month	Rank (Mar 2013)
YouTube	10,224	1,498,759	06:03:27	2.1%	1
VEVO	2,534	45,518	00:35:30	2%	3
Facebook*	2,300	24,465	00:21:41	-57%	2
Mi9	2,207	28,644	00:33:56	-4.7%	4
The CollegeHumor Network	1,795	5,035	00:08:17	31.9%	5
Yahoo!7	1,629	8,563	00:20:37	33.5%	6
ABC Online Network	1,587	13,859	01:23:44	2.82%	7
news.com.au	1,188	7,280	00:08:08	3.3%	8
Dailymotion	972	14,397	01:11:49	8.3%	10
smh.com.au	929	5,134	00:08:24	18.2%	9

* There is a decline in reported *Audience* and *Stream* metrics for Facebook in **April 2013** compared to historical trends. This is due to Facebook moving an increased volume of video activity behind secure domains. Nielsen enhancements during May 2013 will allow for this moving forward, and no further impact to metrics is expected to be experienced.

VIDEO STREAMING: GENDER BREAKDOWN

Although the data shows that there are more females online than males, **males continue to view more streams (23%) than females**, and in fact for the period also increased average stream views month-on-month.



5,721,000	Number of Streaming Australians	5,871,000
1,008,358,000	Total Number of Streams Viewed	772,135,000
189	Average Streams viewed per month	132
08:10	Average PC time per month (HH:MM)	06:35

VIDEO STREAMING: AGE BREAKDOWN – APRIL 2013

2-17

% of Online Aus	6.6%
Average Streams	160
Average Time (H:MM)	7:58

18-24

% of Online Aus	15.9%
Average Streams	283
Average Time (H:MM)	12:36

25-34

% of Online Aus	17.9%
Average Streams	201
Average Time (H:MM)	10:10

35-49

% of Online Aus	28.4%
Average Streams	138
Average Time (H:MM)	6:55

50+

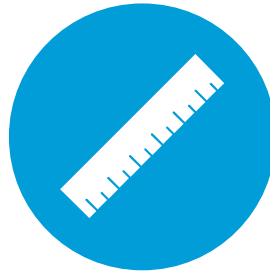
% of Online Aus	31.2%
Average Streams	93
Average PC Time (H:MM)	3:21

An abstract graphic on the left side of the slide. It features a sphere-like shape composed of many thin, curved 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 blue/black.

NIELSEN MARKET INTELLIGENCE UPDATE - DEVICE + MOBILE MODULE

MARKET INTELLIGENCE DEVICE MODULE

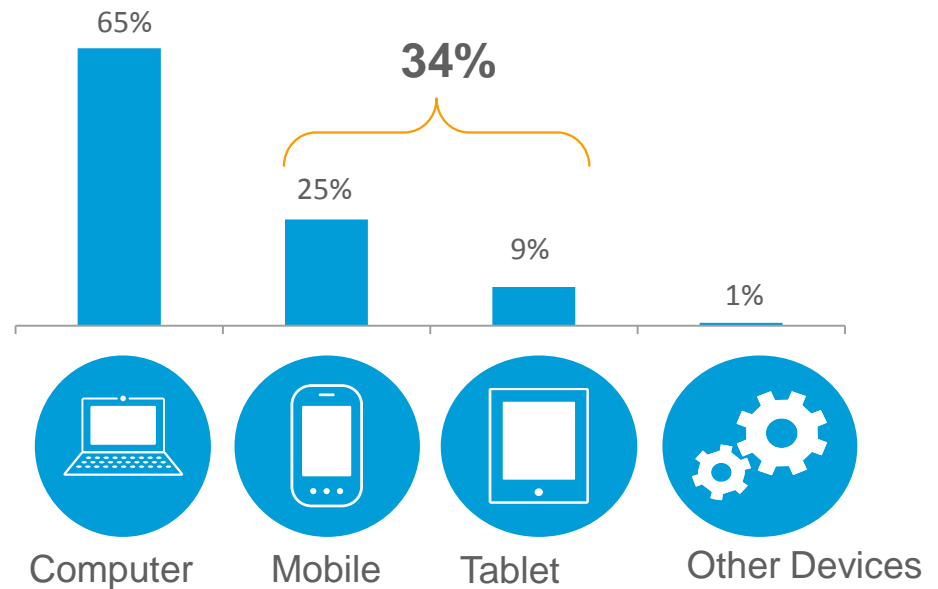
Nielsen's new device module provides daily device level information across all sites and categories in Nielsen's Market Intelligence and measures content access by computer, mobile, tablet and console as well which operating system, and specific device.



With the Device Module being live in Market Intelligence since May 1, we are able to share some preliminary findings in device usage and visitation for the first two weeks of May on the following pages. We will explore device habits in more detail in next month's Landscape Report.

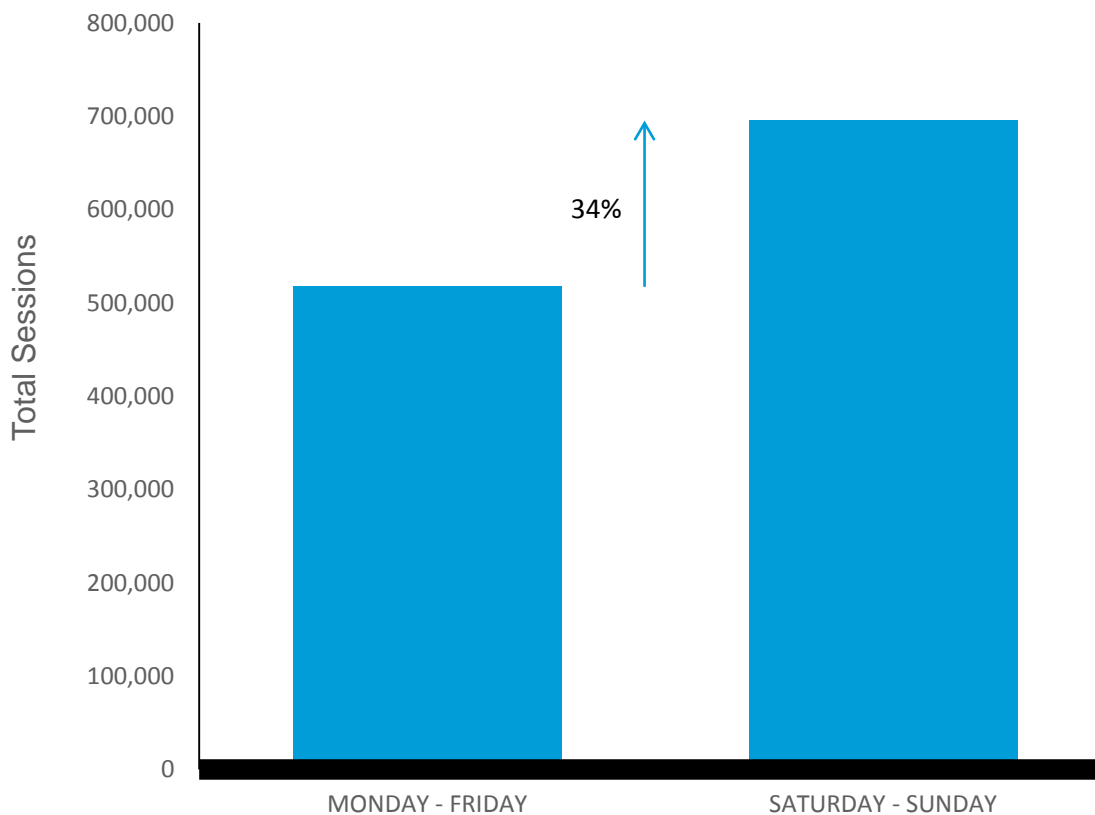
MOBILE AND TABLET
DEVICES ACCOUNT
FOR 34 PERCENT OF
ALL SESSIONS

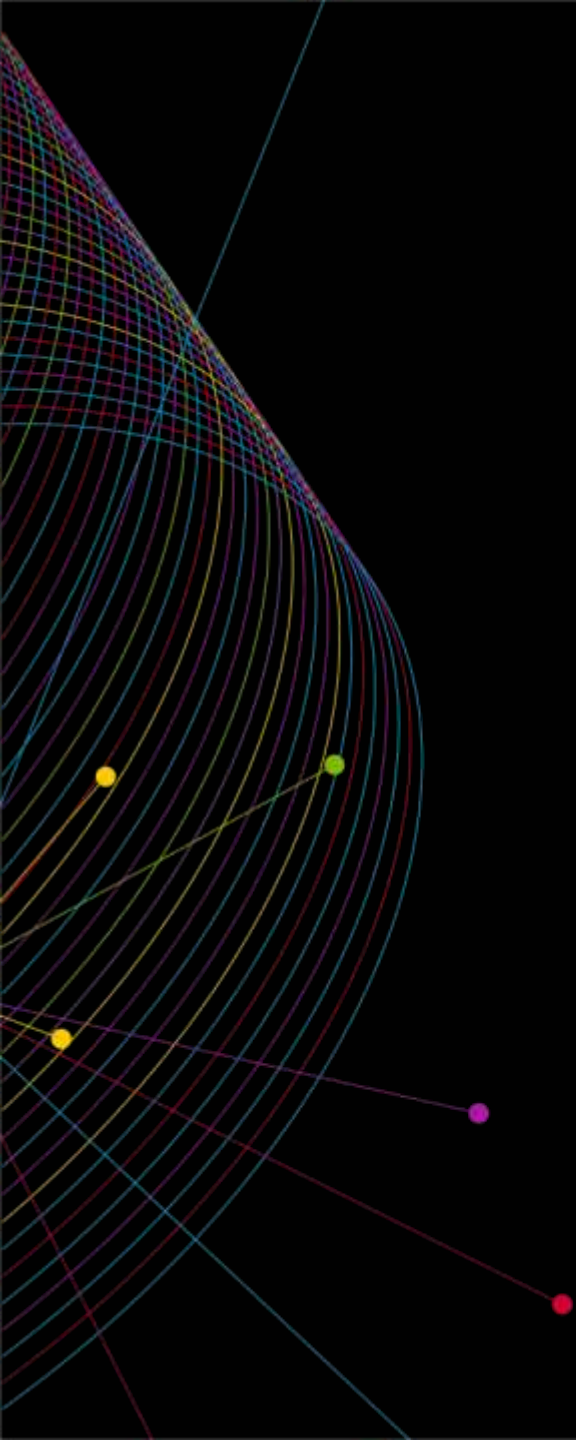
Device usage – Australian Domestic Market Aggregate Total
Sessions May 1-15, 2013



ENTERTAINMENT CATEGORY SNAPSHOT

Within the Entertainment category, sessions from mobile and tablet devices increased by 34 percent on weekends over the period 1-15 May.





NIELSEN TRAINING

TRAINING

Nielsen run regular scheduled and customised training sessions with clients to ensure they're getting the most impactful and actionable insights out of the data available to them.

To register your interest in attending or scheduling a training session, contact your Account Manager or email our Training Team directly for more information:

Ann-Maree Nolan

Senior Cross Platform Audience Measurement Trainer

Ann-maree.nolan@nielsen.com



An abstract graphic on the left side of the slide. It features a series of concentric, overlapping lines that form a spherical 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 sphere, with thin lines connecting some of them, suggesting a network or data points.

CONTACT NIELSEN

www.nielsen.com/au/
(02) 8873 7000