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AUSTRALIAN ONLINE LANDSCAPE REVIEW

MAY 2013



SIGNIFICANT ENHANCEMENTS TO NIELSEN ONLINE RATINGS HYBRID DATA

Summary:

May data represents a trend break versus prior months across all metrics for Online Ratings Hybrid data , Video Census data and Market Intelligence due to :

- A change in the way we measure home use of the internet to measure individuals rather than households
- Improvements to the accuracy of time spent and page measurement
- Improved the accuracy of our state sample
- Improvements to MI to add device reporting to better measure increasingly connected consumers use of the internet across pc, tablet, mobile and other devices.

Explanation:

As a result of changing consumer behaviour, improvements in our measurement science approach and the IAB's recent independent audit of the Nielsen panel, **we have made a number of significant enhancements to the Nielsen Online Ratings Hybrid and VideoCensus data.** These changes reflect the Australian market's continued emphasis on world leading quality audience measurement.

Consumer behaviour is changing rapidly as connected consumers now have a range of different devices they use to connect to the internet. Whilst the most popular connected device remains the personal computer (PC), meaning a computer or laptop, there are now often more than one PC in each household. In order to track multiple PC use in homes and improve the overall accuracy of our household measurement of internet use, we have changed the way we measure home use of the internet to measure individuals rather than households.





SIGNIFICANT ENHANCEMENTS TO NIELSEN ONLINE RATINGS HYBRID DATA

(Continued from page 2)

This change will improve the accuracy of our Online Ratings hybrid data, as panelists who are part of the home sample, but have not used the shared household PC we have metered, have been assumed to have not used the internet in a given month. In some instances, this will not have been the case and they would simply have accessed the internet on a different PC to the shared PC. This assumption meant that we did not include those panelists when projecting the overall “active universe” or, the number of Australians using the internet, in a given month.

We have also made improvements to the accuracy of time spent and page measurement: The key rationale for improving the accuracy of these metrics was to better align with the more sophisticated site designs fuelled by technologies such as AJAX, iFrames as well as video. The accuracy improvements address the growing sophistication of web sites by leveraging a patent-pending process that relies on standard web browsers events versus HTTP traffic for crediting Page Views and Time Spent.

For Page Views, this transition to leveraging standard web browser events greatly improves our ability to identify valid Page Views. This enhancement, along with improvements in crediting time spent for long duration pages and users returning to previously loaded pages, will lead to a significant improvement in the accuracy of both Page Views and Duration.

Finally, we have also we have also improved the accuracy of our state sample by aligning the panel sample from states with changes in the Online Ratings Establishment survey.

We have also made **significant improvements to Market Intelligence (MI) measurement** to better measure increasingly connected consumers use of the internet across pc, tablet, mobile and other devices. The MI device reporting module reports on visitation to any website, not just mobile sites, and includes reporting on specific devices and operating systems. This improvement impacts all MI metrics including Average Daily UB and Sessions.

Should you have any questions regarding these changes, please contact your Nielsen Account Manager.

SUMMARY OF TREND BREAK IMPACT ON NIELSEN ONLINE RATINGS HYBRID DATA KEY METRICS

Key Metrics	Definition	Impact of changes
Unique Audience	The total number of unique people (de-duplicated) that visited a site at least once during the specified reporting period. This metric has been hybridised using tagged census data to capture access from locations outside home and work (including mobile and tablet)	<p>Varied impact on Unique Audience from:</p> <ul style="list-style-type: none"> Improvements in home sample measurement produce a more accurate home UA Improved alignment of the state sample with the establishment survey <p>Declines in audience may occur driven by people (UA) that only visits a web site page no longer counted (e.g. widgets, background calls, see decrease factors against page views below)</p>
Time Per person	The average time spent on a site per user. This metric is only measuring the tab in focus.	<p>Increase in Time Spent for:</p> <ul style="list-style-type: none"> time spent previously credited to falsely credited PVs is redistributed to the originally viewed pages Pages that are actively viewed for longer than 60 seconds Pages with dynamic/updating content which has been out of focus and returns to focus
Page Views	The total number of times a web page is requested by a user and fully downloaded. Where a site is tagged in Market Intelligence (MI), the hybridisation process adjusts the census page impressions to remove things like auto-refresh and non-standard events (e.g. photo galleries). Non-tagged sites are also adjusted by the hybridisation process.	<p>Decrease PVs by:</p> <ul style="list-style-type: none"> Removing (http) text calls falsely credited as pages More accurate removal of unrequested and out of focus pages <p>Varied impact based on allowing iframes if it is more than 50% of the page or there is a subsequent user event on the page</p>

If you would like a detailed whitepaper on these changes and their impacts on all metrics, as these can impact metrics in addition to those mentioned above, please contact your Nielsen Account Manager.

Note: 1. All **Market Intelligence** metrics are affected by the addition of device reporting as described in the above slides
 2. **Video Census** reports hybrid data is also, therefore, impacted by the changes mentioned above

STATE OF THE ONLINE LANDSCAPE – MAY 2013

In this May 2013 edition of the Nielsen Australian Online Landscape Review, we share the latest insights on Australia's Connected Consumers; including market statistics, demographics, top performing major categories, brands and sectors and mobile device use.

When viewing this edition of the Online Landscape Report it is important to note that the changes described on the preceding 2 slides constitute a **trend break** and this should be kept in mind when comparing the metrics from May with Online Ratings data from previous months.

In the month of May 2013:

- There was a unique audience of **16.8 million** Australians online
- **33 billion** pages were viewed online
- **40 billion minutes** were spent online
- The average user spent **40 hours online** spread across **65 sessions**
- There were **810 million mobile page impressions**

Source: Nielsen Online Ratings, May 2013



An abstract graphic on the left side of the slide. It features a dark gray cone shape pointing towards the top left. The surface of the cone is covered with a grid of thin, curved lines in various colors including yellow, green, blue, and red. Several small dots of the same colors are scattered across the cone's surface, with thin lines extending from some of them outwards.

DIGITAL CONTENT MEASUREMENT NEW INTERFACE

DIGITAL CONTENT MEASUREMENT INTERFACE IS NOW THE SOURCE FOR ONLINE RATINGS HYBRID DATA

On June 19, the new Digital Content Measurement interface was launched replacing the NetView interface. Moving forward all Online Ratings Hybrid and VideoCensus data is accessed via this interface. If you would like to book a training session on the new interface, or more information, please contact your Nielsen Account Manager.

The screenshot displays the Nielsen Answers web interface. At the top, the Nielsen logo and 'Nielsen Answers' text are visible. Below this is a navigation bar with tabs: 'My Content', 'My Tools', 'Nielsen Online', 'Workspaces', 'Admin', and 'Evaluation'. The 'My Tools' tab is selected, and its dropdown menu is open, showing options: 'Nielsen Campaign Ratings', 'Nielsen Campaign Ratings – Verification & Viewability', 'Digital Content Measurement' (highlighted), 'Nielsen Usage Reporting', and 'Operational Dashboard'. A red circle highlights the 'My Tools' tab and its dropdown menu. To the right, a 'Selections' dialog box is open, showing configuration options: 'Country' (Australia), 'Audience' (Total), 'Measurement Period' (Oct 2012), and 'Dataset' (Surfing). The 'Dataset' dropdown is open, showing 'Surfing' (highlighted) and 'Streaming'. A red circle highlights the 'Dataset' dropdown, and a red arrow points from the text below to the 'Surfing' option.

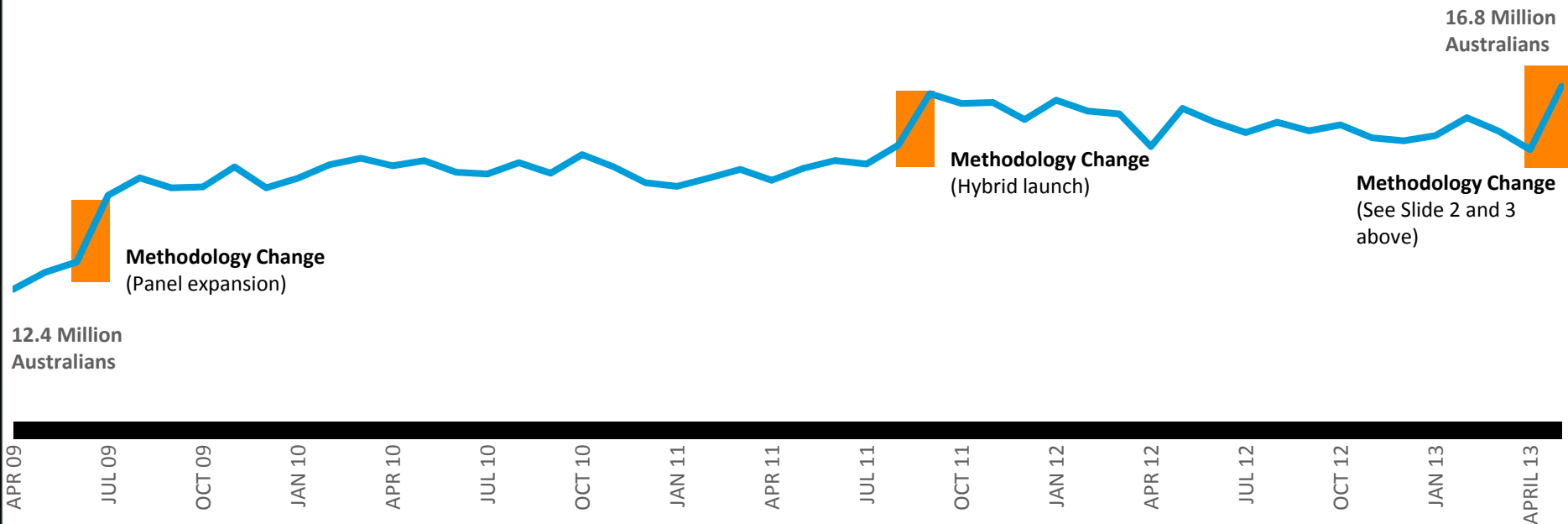
When you login and run reports, you will have the option to switch between Surfing (Hybrid) or Streaming (VideoCensus) data in the one tool

MONTHLY UPDATE

KEY ONLINE STATISTICS – MAY 2013



- 16.8 Million Australians online
- 33.0 Billion page views
- 40.3 Billion minutes spent



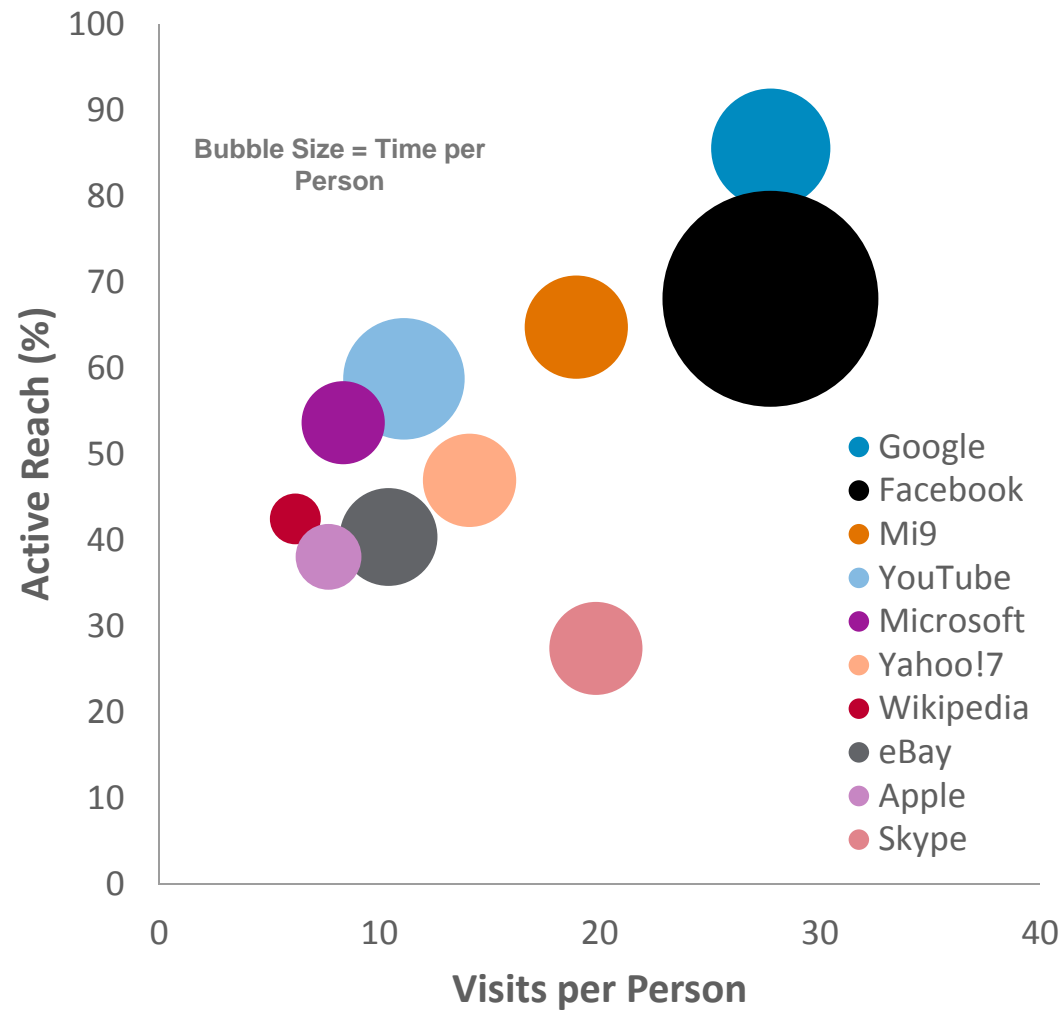
TOP 10 BRANDS BY UNIQUE AUDIENCE* – MAY 2013

Brands	Unique Audience (000s)	Page Views (000s)	Average Time Spent (HH:MM:SS)
Google	14,376	3,312,566	03:00:46
Facebook	11,435	4,569,341	09:51:24
Mi9	10,882	1,431,726	02:15:19
YouTube	9,871	936,010	03:07:04
Microsoft	9,014	44,558	01:27:42
Yahoo!7	7,889	601,878	01:50:10
Wikipedia	7,136	176,418	00:32:40
eBay	6,782	1,080,318	02:01:09
Apple	6,395	29,677	00:54:57
Skype	4,606	4,451	01:49:53

*Including Applications

Source: Nielsen Online Ratings May 2013

TOP 10 BRANDS BY STICKINESS – MAY 2013



Brands	Visits Per Person	Active Reach %	Time Per Person
Google	27.77	85.58	03:00:46
Facebook	27.75	68.07	09:51:24
Mi9	18.94	64.78	02:15:19
YouTube	11.11	58.76	03:07:04
Microsoft	8.35	53.66	01:27:42
Yahoo!7	14.09	46.96	01:50:10
Wikipedia	6.18	42.48	00:32:40
eBay	10.41	40.37	02:01:09
Apple	7.68	38.07	00:54:57
Skype	19.82	27.42	01:49:53

AGE DEMOGRAPHIC % BREAKDOWN – MAY 2013

2-17

% of Online Aus	8.0%
Average PV's	459
Time per person	10:19*
*(HH:MM)	

18-24

% of Online Aus	11.2%
Average PV's	2,299
Time per person	47:51*
*(HH:MM)	

25-34

% of Online Aus	18.3%
Average PV's	2,430
Time per person	46:33*
*(HH:MM)	

35-49

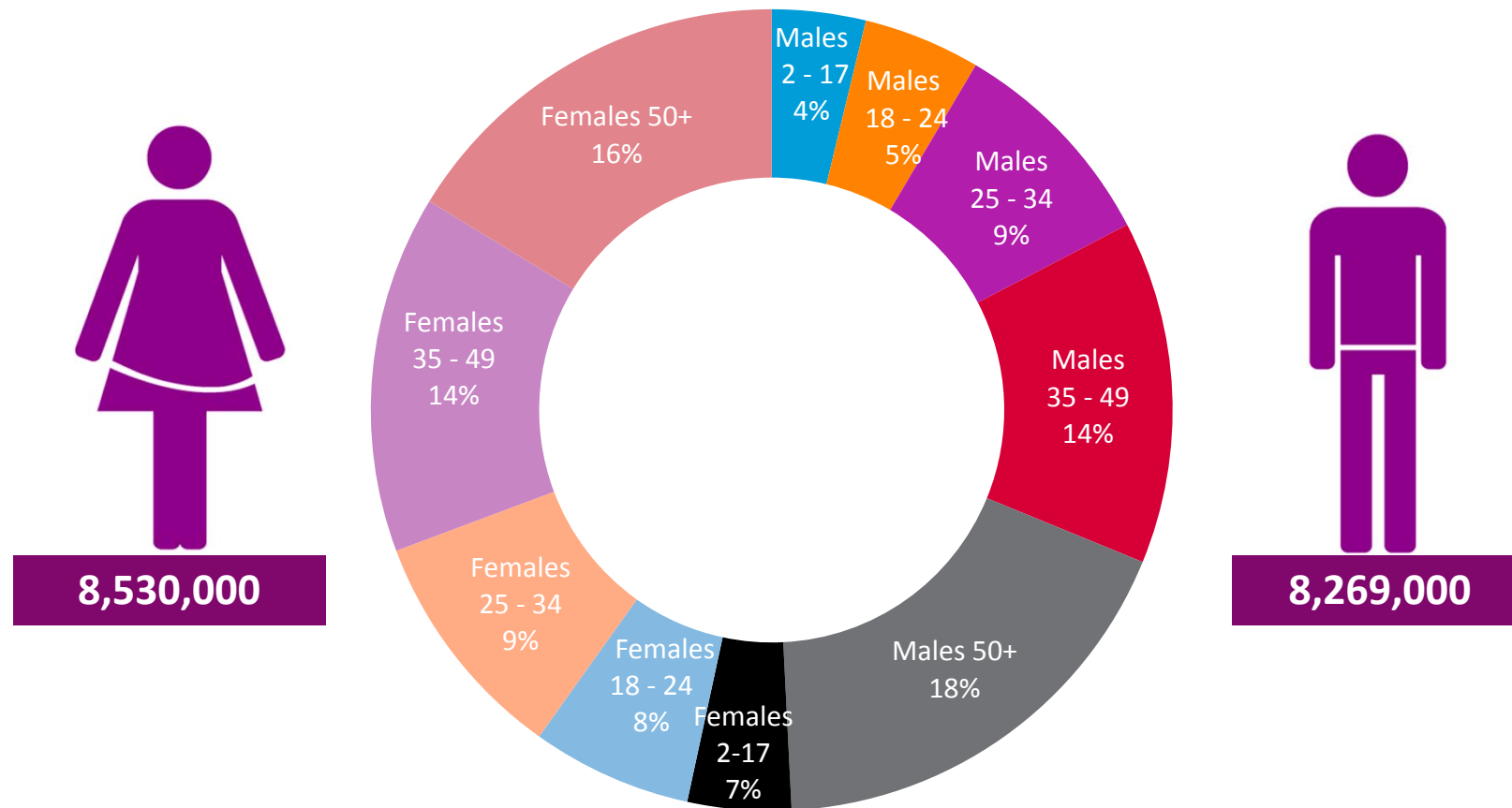
% of Online Aus	28.3%
Average PV's	2,163
Time per person	45:48*
*(HH:MM)	

50+

% of Online Aus	34.3%
Average PV's	1,804
Time per person	36:06*
*(HH:MM)	

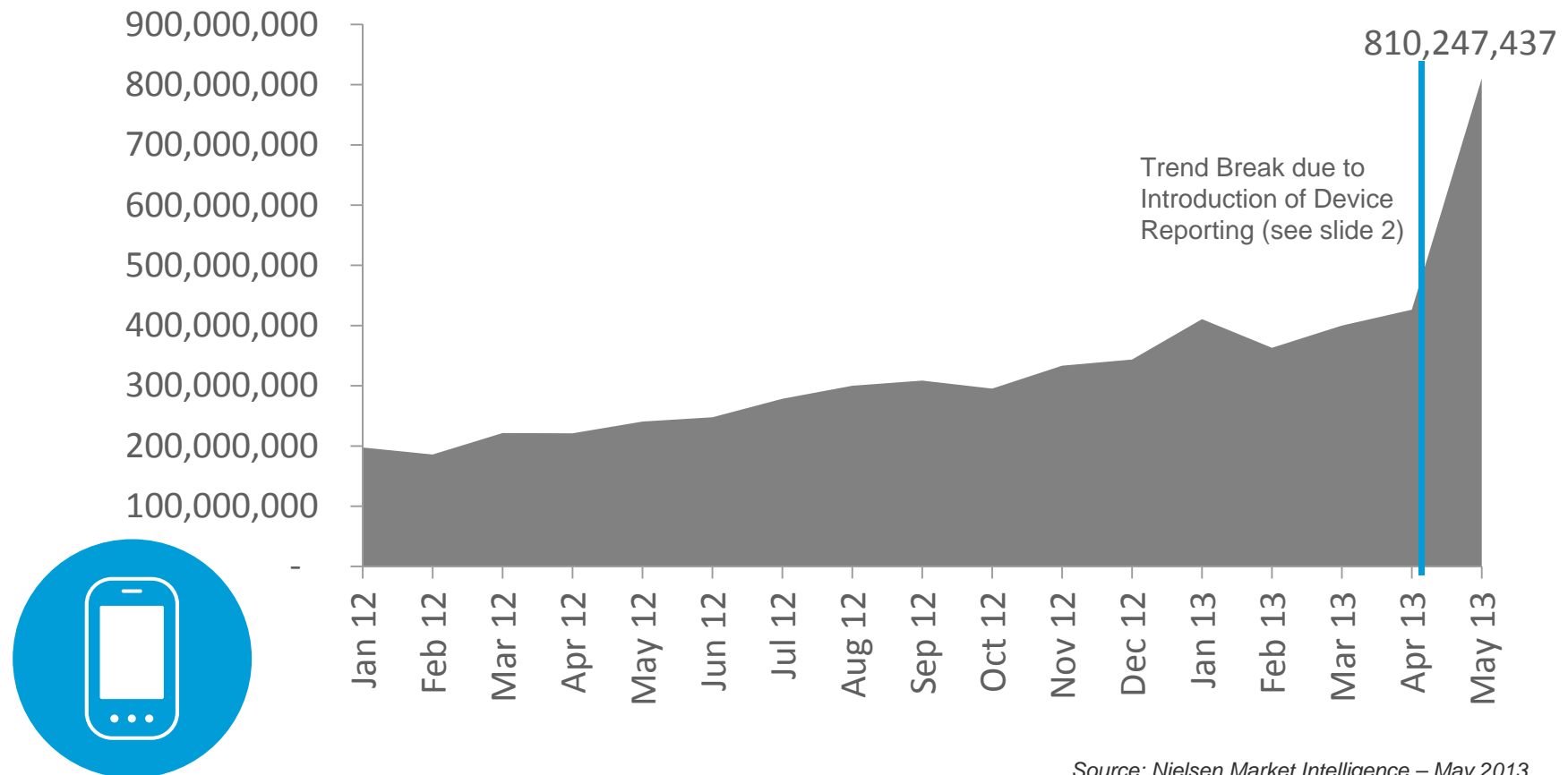
GENDER BREAKDOWN – MAY 2013

Number and percentage of Online Australians by age group and gender



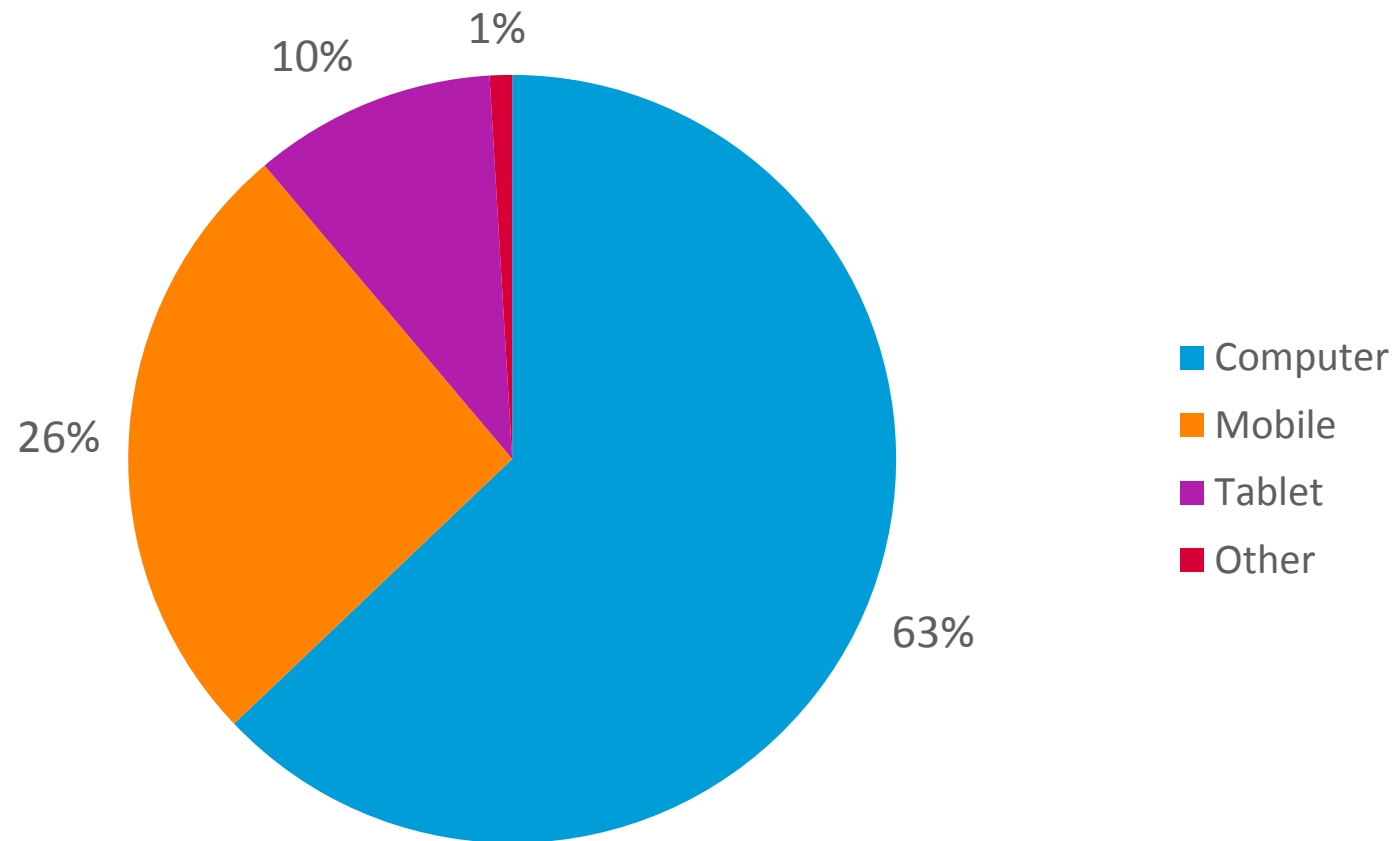
MOBILE PAGE VIEWS – MAY 2013

After the first full month of device reporting in Market Intelligence, Mobile Page impressions were more than 810M. The trend break is a result of methodology change which allows for all tagged websites accessed on a mobile device being counted, as opposed to just m. sites.



DEVICE TYPE COMPARISON – TOTAL AVG DAILY UB MAY 2013

Our first full month's data for mobile device type shows 36% of all traffic for the period being driven from a mobile or tablet device.



NIELSEN VIDEOCENSUS

VIDEOCENSUS – MAY 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 May 2013:

- **12.5 million** Australians streamed online videos
- A grand total of **1.75 billion** streams were viewed
- **5.12 billion** minutes were spent streaming content
- On average, Australians spent **6 hours** and **49 minutes** watching online video and viewed **140** streams



VIDEO CENSUS TOP 10 BRANDS – MAY 2013

Brands	Unique Audience (000s)	Total Streams (000s)	Average Time Spent (HH:MM:SS)
YouTube	10,765	1,322,157	05:23:00
Facebook	4,165	45,834	00:24:33
Mi9	2,362	33,638	00:38:27
VEVO	2,305	50,923	00:42:07
The CollegeHumor Network	1,619	5,089	00:11:00
Yahoo!7	1,480	7,044	00:18:22
ABC Online Network	1,473	14,672	01:45:02
news.com.au	1,150	7,957	0:08:53
Vube	1,150	3,364	00:12:02
smh.com.au	1,008	5,145	00:06:46

VIDEO CENSUS: DEMOGRAPHIC BREAKDOWN

The genders are fairly evenly split amongst the total number of Australians streaming video in May, with females accounting for slightly less streaming Australians. In engagement terms **males viewed 37% more streams than females** and had higher time spent viewing video.



6,279,000

Number of Streaming Australians

6,238,000

1,010,452,000

Total Number of Streams Viewed

738,859,000

161

Average Streams viewed per month

118

07:23

Average PC time per month (HH:MM)

06:14

VIDEO CENSUS AGE DEMOGRAPHIC % BREAKDOWN – MAY 2013

2-17

% of Online Aus	6.6%
Average Streams	114
Average Time	06:16

18-24

% of Online Aus	10.8%
Average Streams	320
Average Time	15:08

25-34

% of Online Aus	18.5%
Average Streams	187
Average Time	09:30

35-49

% of Online Aus	28.7%
Average Streams	123
Average Time	06:14

50+

% of Online Aus	35.4%
Average Streams	78
Average Time	3:27

HINTS AND TIPS

HINTS AND TIPS FOR ACTIONABLE INSIGHTS

Finding the right data to address your business issues can be complex, and there is a large amount of data within Nielsen Online Ratings that is of value.

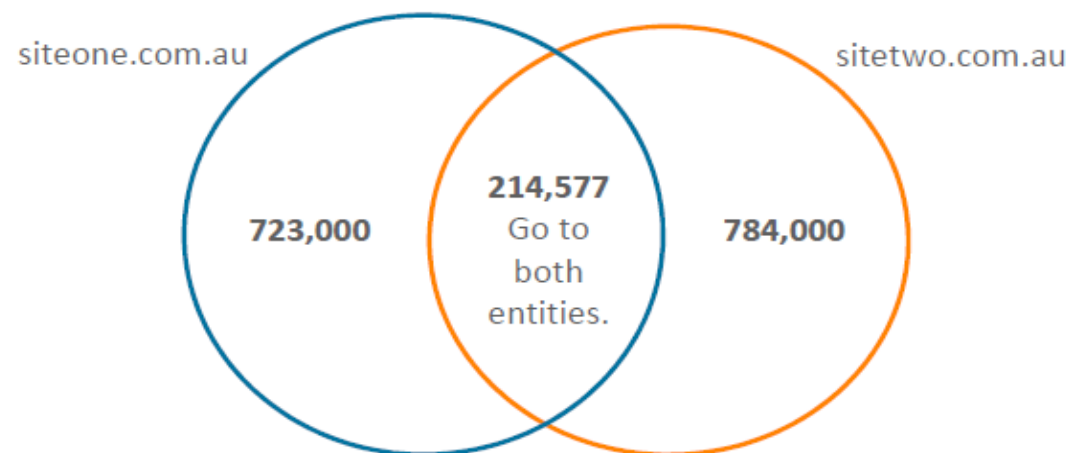
Each month, we'll provide within this section some hints and tips for how to use the data, and what you see within the interface. We'll address frequently asked questions to help make the data more actionable.

If you'd like to request a training session at any time, speak with your Nielsen Account Manager or contact our Training Manager directly: Ann-Maree.Nolan@nielsen.com



DUPLICATION – OVERLAP AUDIENCE

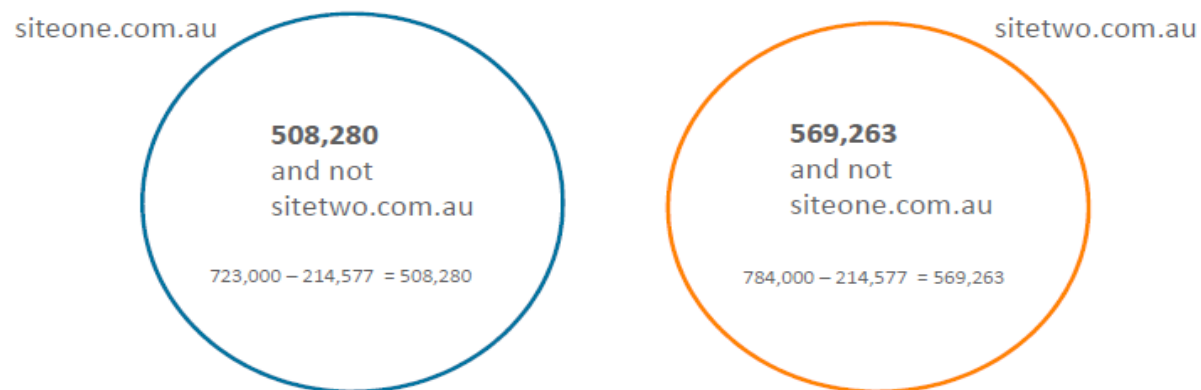
Within the digital content measurement interface, there is the ability to view both the incremental audience and the duplicated audience between two selected sites. The duplication – overlap audience report shows the unique audience that visited both selected sites within a given period.



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Duplication - Overlap Audience (000)			
Name	Unique Audience (000)	siteone.com.au	sitetwo.com.au
siteone.com.au	723		214,577
sitetwo.com.au	784	214,577	
the Market	13,957		
Common Audience	215		
Unduplicated Audience	1,292		

DUPLICATION – INCREMENTAL AUDIENCE

The duplication (incremental audience) report shows the unique, **unduplicated** audience for two selected sites for the period. Within this report, there is no overlapping audience between site 1 and site 2.



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Duplication - Incremental Audience (000's)			
Name	Unique Audience (000)	siteone.com.au	sitetwo.com.au
siteone.com.au	723		508,280
sitetwo.com.au	784	569,263	
the Market	13,857		
Common Audience	215		
Unduplicated Audience	1,292		



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