THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

JUNE 2013

STATE OF THE ONLINE LANDSCAPE
JUNE 2013

Welcome to the June 2013 edition of Nielsen's Online Landscape Review. We're making a number of improvements to the content of this review to ensure we're helping publishers, agencies and advertisers make faster, smarter decisions about the way you connect with customers.

With 17.2 million Australians accessing the internet during June 2013, spending an average of 37 hours online across 60 sessions, there's a great story to be told for the state of the online industry in Australia.

Through our Market Intelligence platform we're gaining more and more insight into the proportion of traffic to main publishers that is coming from mobile devices – for the Family & Lifestyle category in June, this figure was almost 40% of total traffic.

If you'd like to know more about anything within this report, contact your Nielsen Account Manager directly or email careau@nielsen.com

# OUR DATA: THE NIELSEN PERSPECTIVE

Did you know? Nielsen's online panels include more than 500,000 global internet users.

THE ONLINE LANDSCAPE – JUNE 2013

In this June 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.

In the month of June 2013:

- The was a unique audience of **17.2 million** Australians online

- **31 billion** pages were viewed online

- **38 billion minutes** were spent online

- The average user spent **37 hours online** spread across **60 sessions**

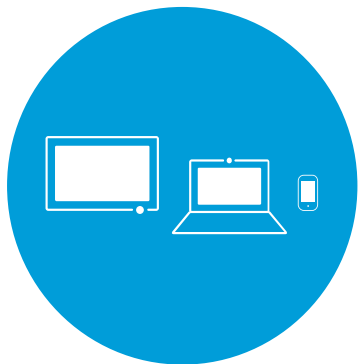- There were **791 million mobile page impressions**
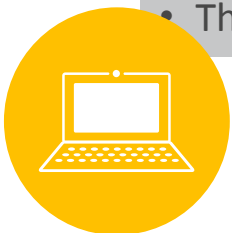
Source: Nielsen Online Ratings – Hybrid, June 2013

THE ONLINE UNIVERSE: JUNE 2013
NIELSEN ONLINE RATINGS: HYBRID

KEY ONLINE STATISTICS JUNE 2013

17.2 Million Australians online

31.0 Billion page views

38.5 Billion minutes spent

17.2 Million Australians

**Trend break:
Methodology Change**
(Panel expansion)

**12.4 Million
Australians**

**Trend break:
Methodology Change**
(Hybrid launch)

**Trend break:
Methodology Change**
(Panel Enhancements)

APR 09 | JUL 09 | OCT 09 | JAN 10 | APR 10 | JUL 10 | OCT 10 | JAN 11 | APR 11 | JUL 11 | OCT 11 | JAN 12 | APR 12 | JUL 12 | OCT 12 | JAN 13 | APR 13

Source: Nielsen Online Ratings – Hybrid, June 2013

7
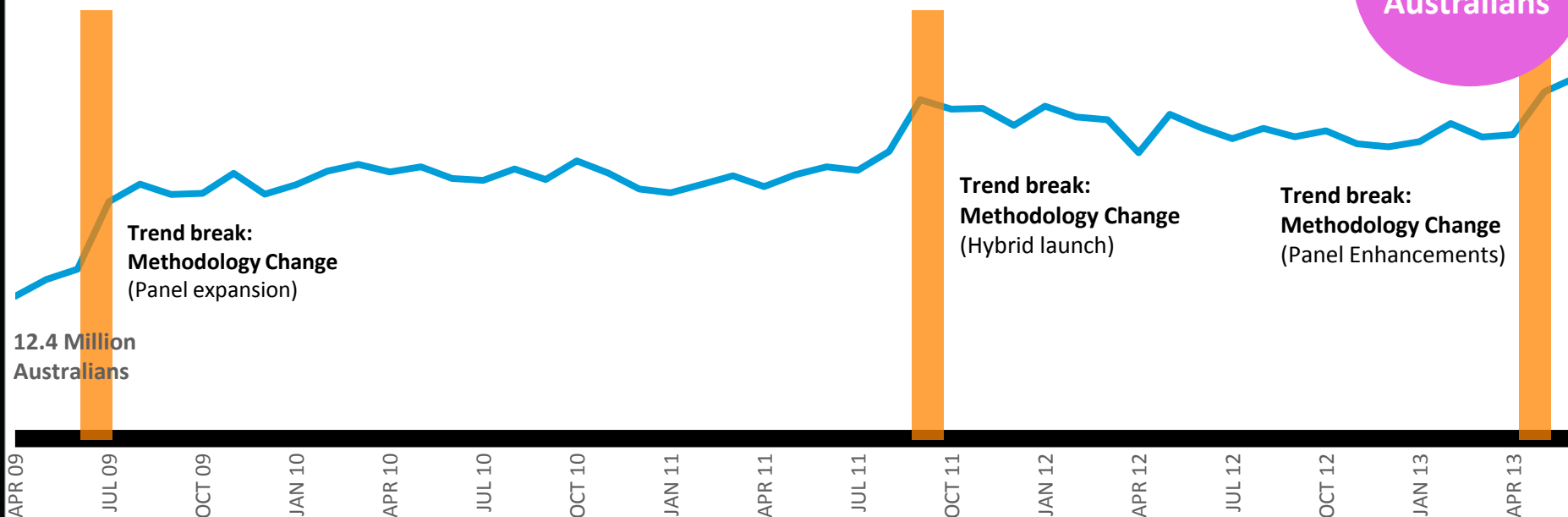
TOP 10 BRANDS BY UNIQUE AUDIENCE* – JUNE 2013

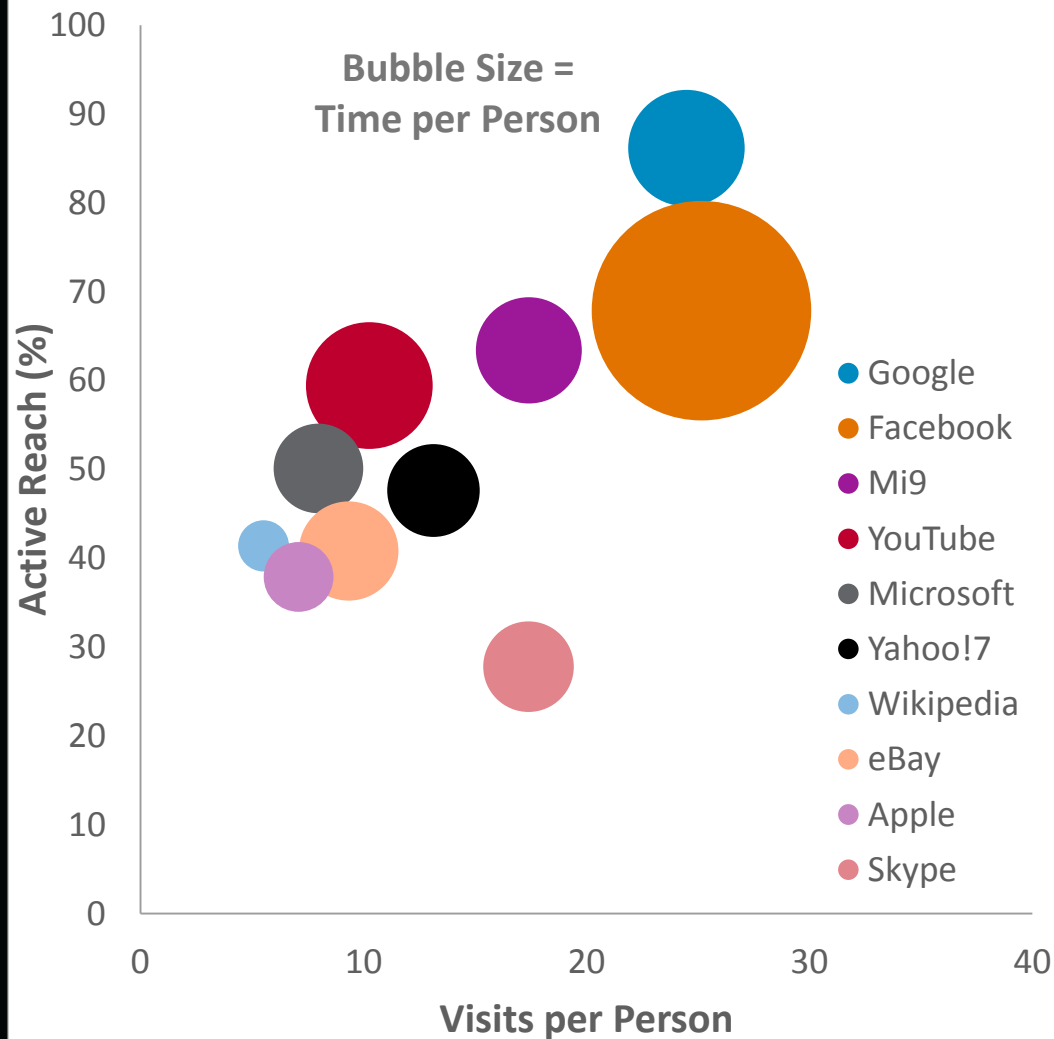| Brands	Unique Audience (000s)	Page Views (000s)	Average Time Spent (HH:MM:SS)
Google	14,784	2,958,752	02:35:33
Facebook	11,645	4,123,652	09:12:28
Mi9	10,879	1,342,309	02:08:58
YouTube	10,202	956,239	03:04:23
Microsoft	8,597	38,150	01:31:57
Yahoo!7	8,169	534,234	01:38:32
Wikipedia	7,102	153,823	00:29:51
eBay	7,003	1,061,682	01:53:36
Apple	6,503	28,657	00:56:07
Skype	4,766	4,159	01:34:14

*Including Applications that access the internet

Source: Nielsen Online Ratings – Hybrid, June 2013

TOP 10 BRANDS BY STICKINESS – JUNE 2013

Bubble Size =
Time per Person

- Google
- Facebook
- Mi9
- YouTube
- Microsoft
- Yahoo!7
- Wikipedia
- eBay
- Apple
- Skype

Brands	Active Reach %	Visits Per Person	Time Per Person
Google	86.16	24.49	2:35:33
Facebook	67.87	25.16	9:12:28
Mi9	63.40	17.42	2:08:58
YouTube	59.45	10.27	3:04:23
Microsoft	50.1	7.98	1:31:57
Yahoo!7	47.61	13.14	1:38:32
Wikipedia	41.39	5.52	0:29:51
eBay	40.81	9.34	1:53:36
Apple	37.9	7.09	0:56:07
Skype	27.78	17.41	1:34:14

Source: Nielsen Online Ratings – Hybrid, June 2013

AGE DEMOGRAPHICS ONLINE – JUNE 2013

2-17

Percentage of Online Aus	7.7%
Average Page Views	613
Avg Time Per Person (HH:MM)	12:58

18-24

Percentage of Online Aus	11.2%
Average Page Views	2,105
Avg Time Per Person (HH:MM)	46:23

25-34

Percentage of Online Aus	18.8%
Average Page Views	2,116
Avg Time Per Person (HH:MM)	41:20

35-49

Percentage of Online Aus	28.1%
Average Page Views	2,013
Avg Time Per Person (HH:MM)	41:39

50+

Percentage of Online Aus	34.1%
Average Page Views	1,639
Avg Time Per Person (HH:MM)	34:18

Source: Nielsen Online Ratings – Hybrid, June 2013

GENDER BREAKDOWN – JUNE 2013

Number and percentage of Online Australians by age, group and gender.
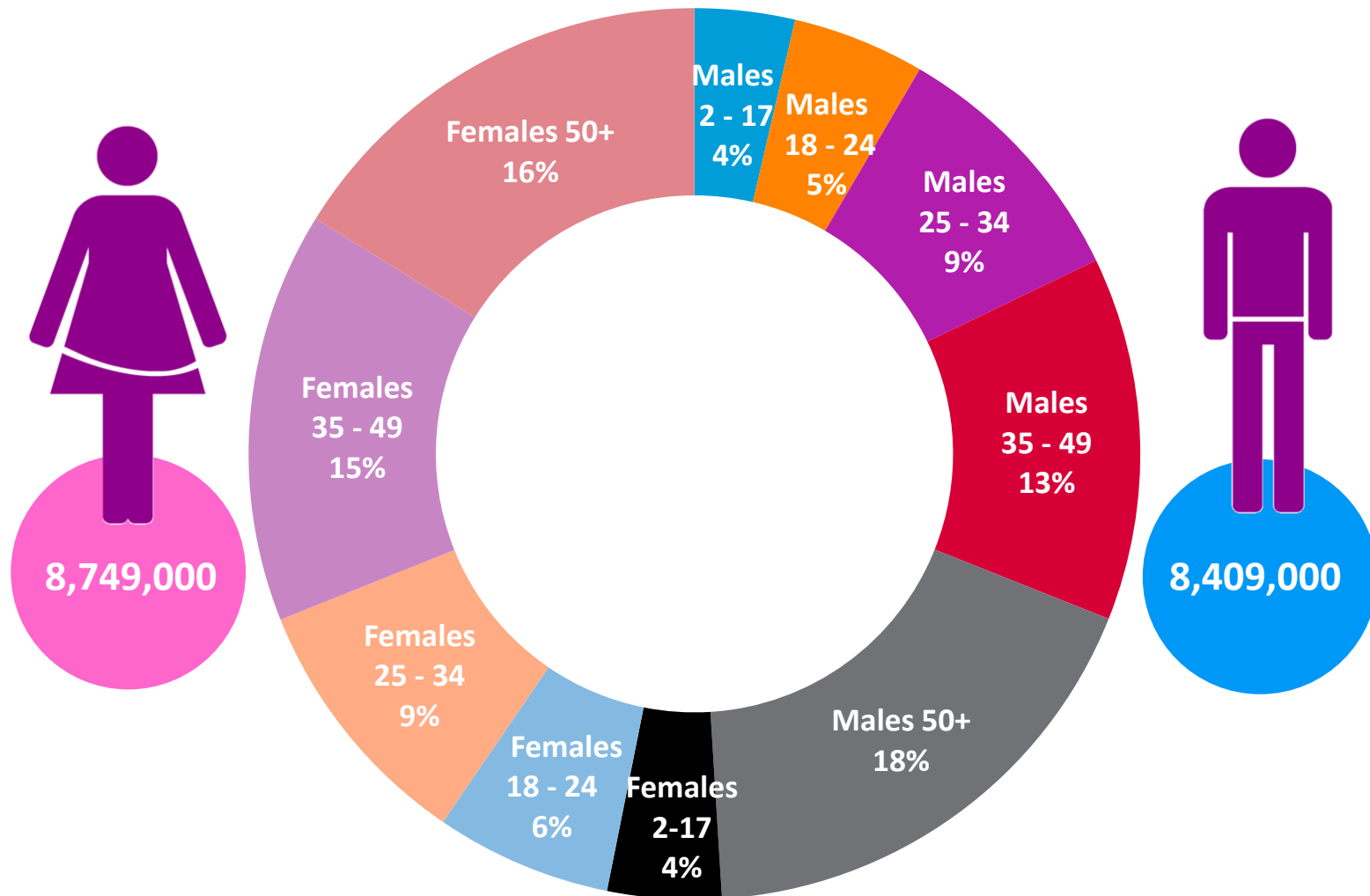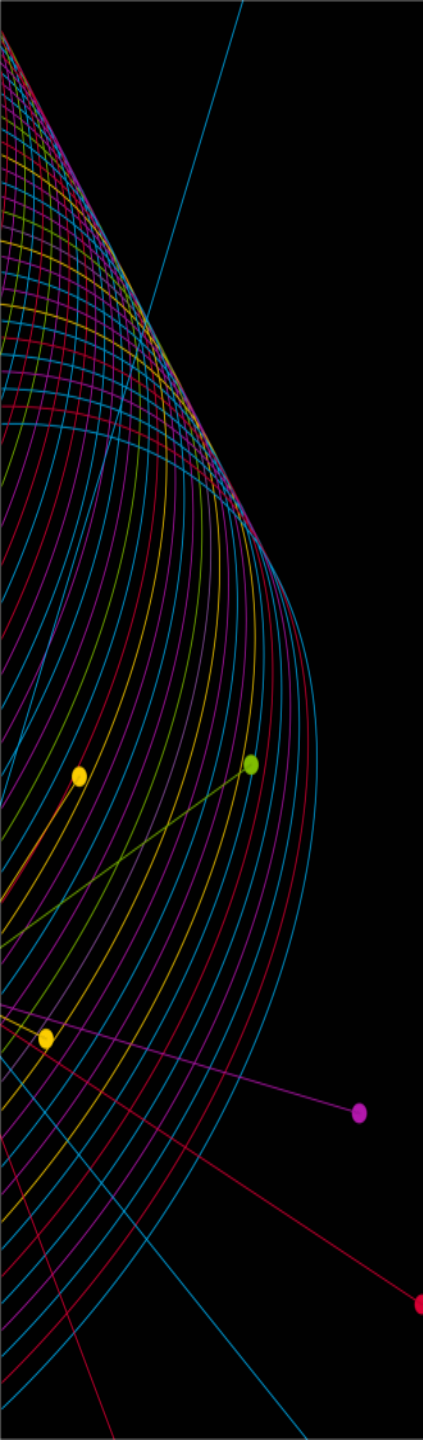
Females 50+ 16%

Females 35 - 49 15%

Females 25 - 34 9%

Females 18 - 24 6%

Females 2-17 4%

8,749,000

Males 2 - 17 4%

Males 18 - 24 5%

Males 25 - 34 9%

Males 35 - 49 13%

Males 50+ 18%

8,409,000

Source: Nielsen Online Ratings – Hybrid, June 2013

THE ONLINE UNIVERSE: JUNE 2013
NIELSEN ONLINE RATINGS:
HYBRID STREAMING (VIDEO)

"**Did you know?...The Entertainment category is the highest ranking category for Video Streaming with a unique audience of 11.5 Million during June 2013.**"

STREAMING KEY ONLINE STATISTICS – JUNE 2013

Digital Content Measurement's Streaming dataset is Nielsen's online video measurement tool, providing the market with accurate breakdowns of how and where Australians are streaming online video content.
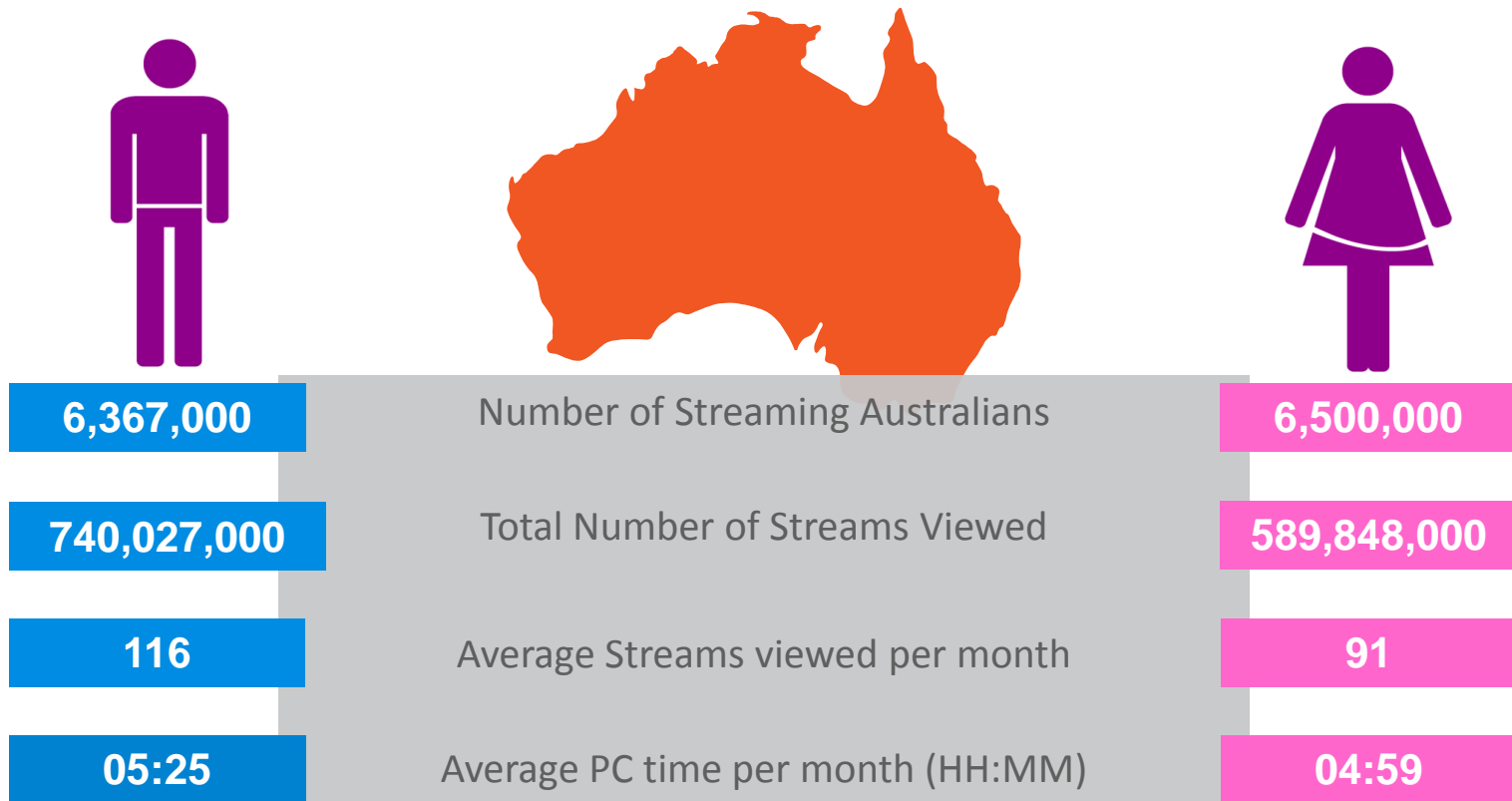
In the month of June 2013:

- **12.9 million** Australians streamed online videos

- A grand total of **1.33 billion** streams were viewed

- **4.02 billion** minutes were spent streaming content

- On average, Australians spent **5 hours** and **12 minutes** watching online video and viewed **103** streams
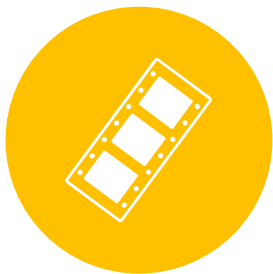
HYBRID STREAMING: TOP 10 BRANDS BY UNIQUE AUDIENCE - JUNE 2013

Brands	Unique Audience (000s)	Total Streams (000s)	Average Time Spent (HH:MM:SS)
YouTube	11,098	937,539	03:39:51
Facebook	4,127	59,102	00:27:30
VEVO	2,583	50,088	00:41:49
Mi9	2,233	30,807	00:36:00
The CollegeHumor Network	1,918	4,812	00:09:42
Yahoo!7	1,591	6,189	00:17:34
ABC Online Network	1,177	9,063	01:40:24
smh.com.au	936	4,906	0:07:50
Vube	816	2,718	00:17:18
The Age	656	3,405	00:10:40

Source: Nielsen Online Ratings – Hybrid Streaming, June 2013

HYBRID STREAMING: DEMOGRAPHIC BREAKDOWN

Male		Female
6,367,000	Number of Streaming Australians	6,500,000
740,027,000	Total Number of Streams Viewed	589,848,000
116	Average Streams viewed per month	91
05:25	Average PC time per month (HH:MM)	04:59

HYBRID STREAMING: AGE DEMOGRAPHICS – JUNE 2013

2-17

Percentage of Online Aus	6.8%
Average Streams	95
Average Time (HH:MM)	04:56

18-24

Percentage of Online Aus	11.5%
Average Streams	230
Average Time (HH:MM)	11:35

25-34

Percentage of Online Aus	19.3%
Average Streams	116
Average Time (HH:MM)	06:35

35-49

Percentage of Online Aus	28.3%
Average Streams	97
Average Time (HH:MM)	05:01

50+

Percentage of Online Aus	34.1%
Average Streams	60
Average Time (HH:MM)	02:28
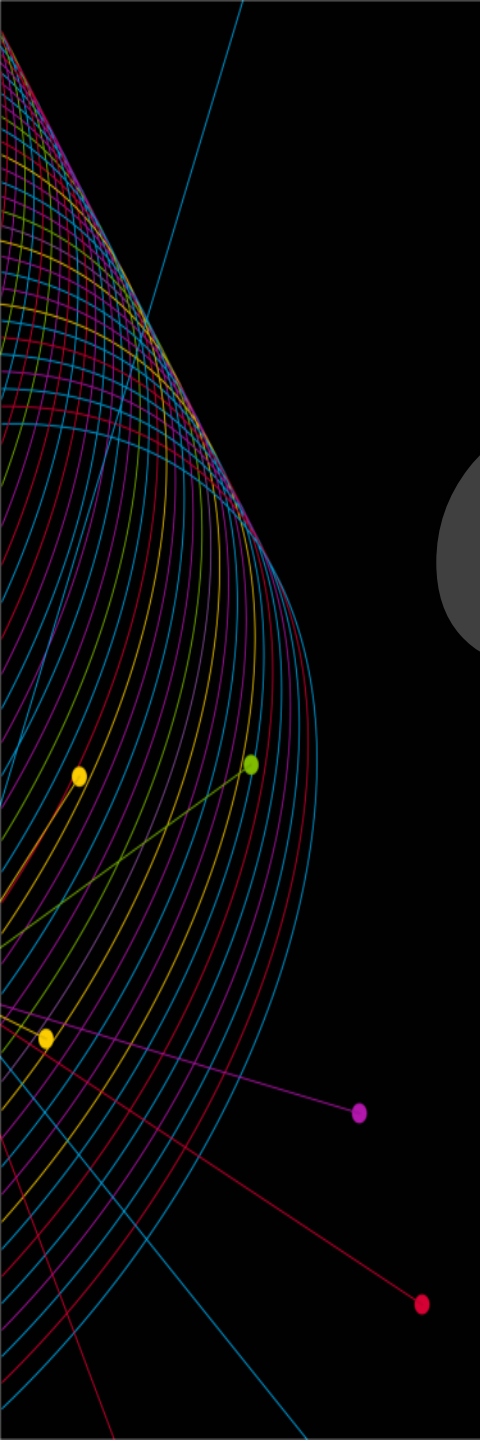
Source: Nielsen Online Ratings – Hybrid Streaming, June 2013

THE MOBILE UNIVERSE: JUNE 2013
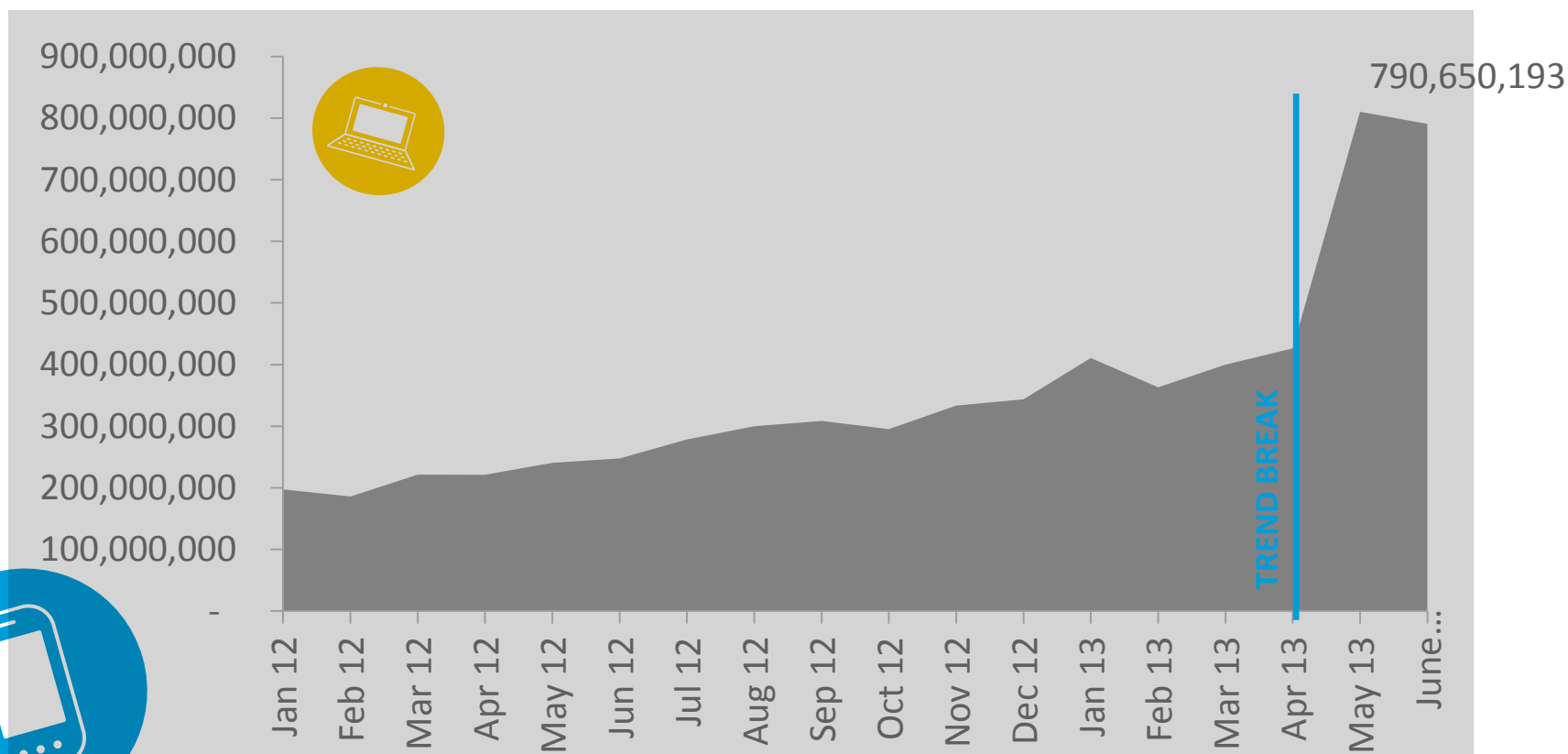NIELSEN MARKET INTELLIGENCE

"Did you know?...15% of movie-goers watch movie previews on their smartphones, up from 6% in 2010"
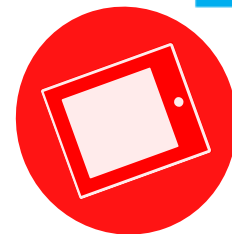
MOBILE PAGE IMPRESSIONS – JUNE 2013

June saw a slight decline in total Mobile Page Impressions, largely attributable to June being one day shorter than May. The trend break in April 2013 is a result of methodology change which allows for all tagged websites accessed on a mobile device to be counted, as opposed to just m. sites.

790,650,193

900,000,000	
800,000,000	
700,000,000	
600,000,000	
500,000,000	
400,000,000	
300,000,000	
200,000,000	
100,000,000	
-	

Jan 12 Feb 12 Mar 12 Apr 12 May 12 Jun 12 Jul 12 Aug 12 Sep 12 Oct 12 Nov 12 Dec 12 Jan 13 Feb 13 Mar 13 Apr 13 May 13 June…

TREND BREAK

Source: Nielsen Market Intelligence June 2013

DEVICE TYPE COMPARISON
TOTAL AVERAGE DAILY UNIQUE BROWSERS JUNE 2013

11% **1%**

27%

61%

- ■ Computer
- ■ Mobile
- ■ Tablet
- ■ Other*
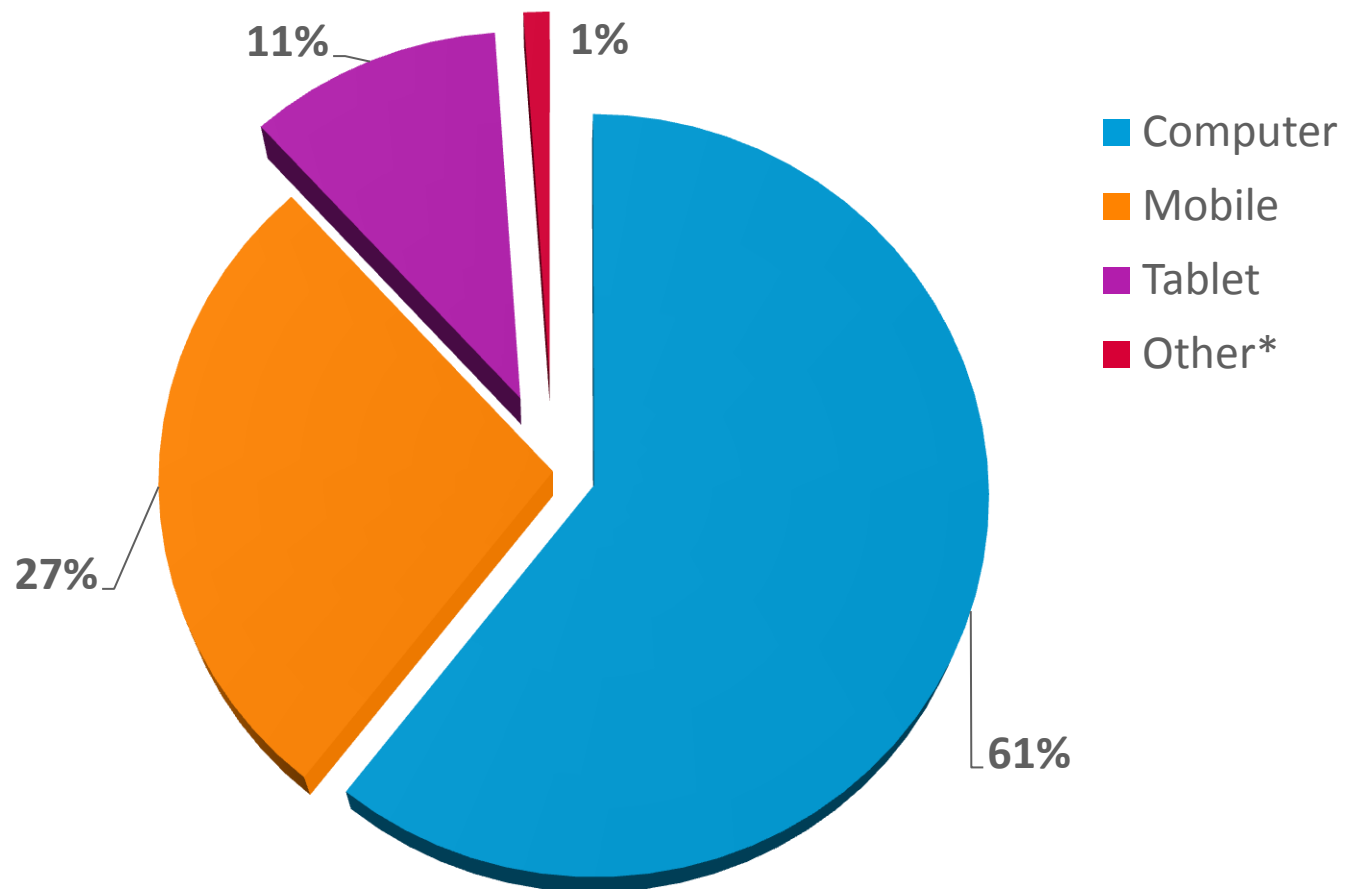
* Other is a sum of Console, Others and Unclassified devices

Source: Nielsen Online Ratings - Market Intelligence June 2013
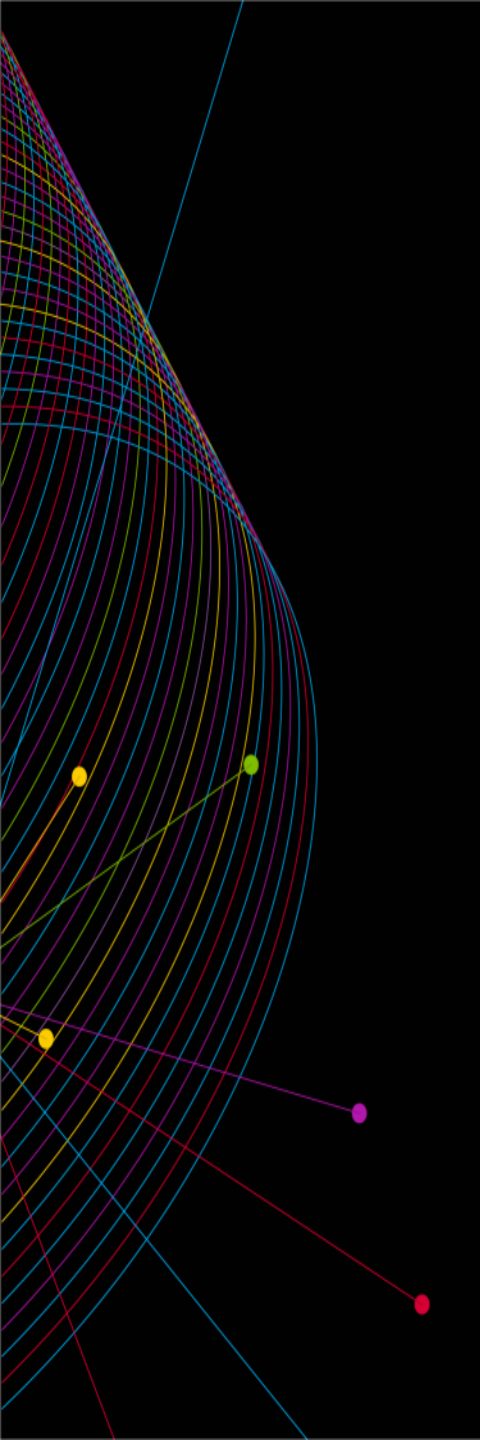
DEVICE REPORTING
INTERESTING TRENDS

A top line device type report, by category, indicates that the Family and Lifestyle has the highest mobile + tablet percentage of access, with 40% of traffic coming from either a tablet or a mobile device.
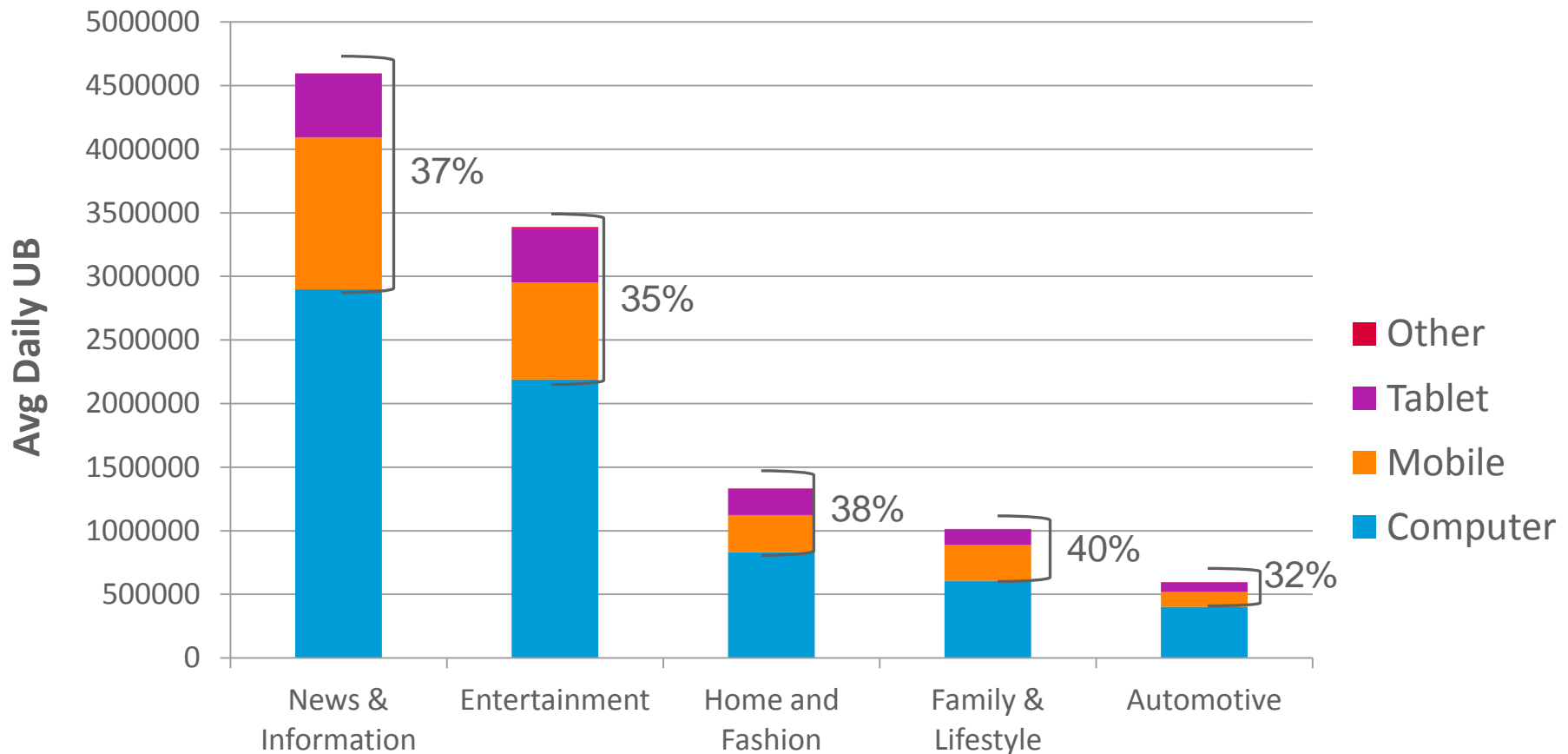
HINTS AND TIPS FOR USING NIELSEN DATA

Did you know? Smartphone penetration in the United States is now 60% of total population.

HINTS AND TIPS FOR ACTIONABLE INSIGHTS

Finding the right data to address your business issues can be tricky, 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 Cross-Platform Training Manager directly: Ann-Maree.Nolan@nielsen.com

For any Media related questions and enquiries, contact your account manager directly, or email: careau@nielsen.com

THE NIELSEN ONLINE PRODUCT MIX

Due to the ever changing nature of the Online Environment, Nielsen is constantly updating its products and services to meet the needs of publishers and advertisers alike.

The current state of our Nielsen Online Ratings suite of Products and Services include:

Nielsen Online Ratings

Nielsen Online Ratings – Hybrid and Hybrid Streaming

Within the Nielsen Online Ratings platform, 'Digital Content Measurement' is the interface to the **Industry Standard** for Surfing (Hybrid) and Video Streaming (Hybrid Streaming) data.

Market Intelligence

Market Intelligence demonstrates key traffic based metrics such as Sessions, Page Impressions, UB counts, available even by device or geo location. The key point of difference is that Market Intelligence measures device traffic while Nielsen Online Ratings (Hybrid) applies panel based methodologies to measure actual people who are accessing online content.

REACH AND FREQUENCY REPORTING

Reach and Frequency reporting is available as a Standard Report via Digital Content Measurement. It is fully configurable to Nielsen Online Ratings – Hybrid Surfing and Streaming data. Any ad-supported site can be included in the report as well as all demographic targets, however Nielsen recommends limiting the demographic target to a basic combination of no more than two target points (e.g. Males, 18-34).

REACH AND FREQUENCY REPORTING

In a Reach and Frequency Report there are 4 customisable metrics:

1. **Cost Per Thousand Impressions (CPM)** – the cost of 1000 advertising impressions on a webpage. Value defaults to $5 but can be replaced.
2. **Desired Cost** – how much is allocated to spend on advertising inventory per site.
3. **Desired Total Impressions** - desired total exposure of an ad to all visitors to the site.
4. **Desired Target Impressions** – desired total exposure of an ad to only those site visitors within the ad's intended target audience

| Report Manager | Report Builder | Report Viewer | | | | | | | | | | User Preferences | Help |

ReachFrequency_NewReport [X]

Measurement Period: Jun 2013   Audience: Total   Country: Australia   [Edit Specification]
Entities: VEVO, MCM Media, MTV Music Group
Targets: Persons - Gender [Male]; Age [18-34]

Items 1 to 3 of 3. Page 1 of 1   Go to Page: 1

Enter text here   All

Name	Level	1	Cost Per Thousand Impressions (CPM)	Desired Cost (000)	Desired Total Impressions (000)	Desired Target Impressions (000)	Unique Audience (000)	Total Minutes (000)	Total Page Views (000)	Target Audience (000)	Target Minutes (000)	Target Page Views (000)	% o
VEVO	B		5			100	2,178	35,138	16,341	483	9,832	3,927	
MCM Media	B		5			25	321	5,863	3,147	36	578	535	
MTV Music Group	B		5			30	256	3,547	2,735	48	466	376	
the Market			0	0	0	0	17,159	38,484,454	30,994,443	2,439	6,602,704	5,062,579	1 6

REACH AND FREQUENCY REPORTING

The report is best thought of as a 'lite' planning tool for agencies and interested publishers. There is no frequency capping , rather it is designed to get an understanding of how sites, both individually and in combination, can contribute to reach, frequency, impression or cost goals for a campaign. The report is broken down into analysis by Impressions, Total Reach/Frequency/GRP, Target Reach/Frequency/TRP and Cost.

| Report Manager | Report Builder | **Report Viewer** | | | | | | | User Preferences | Help |

| ReachFrequency_NewReport [x] | ReachFrequency_NewReport [x] |

Measurement Period: Jun 2013   **Audience:** Total   **Country:** Australia   [Edit Specification] [Edit Campaign]

Entities: VEVO, MCM Media, MTV Music Group

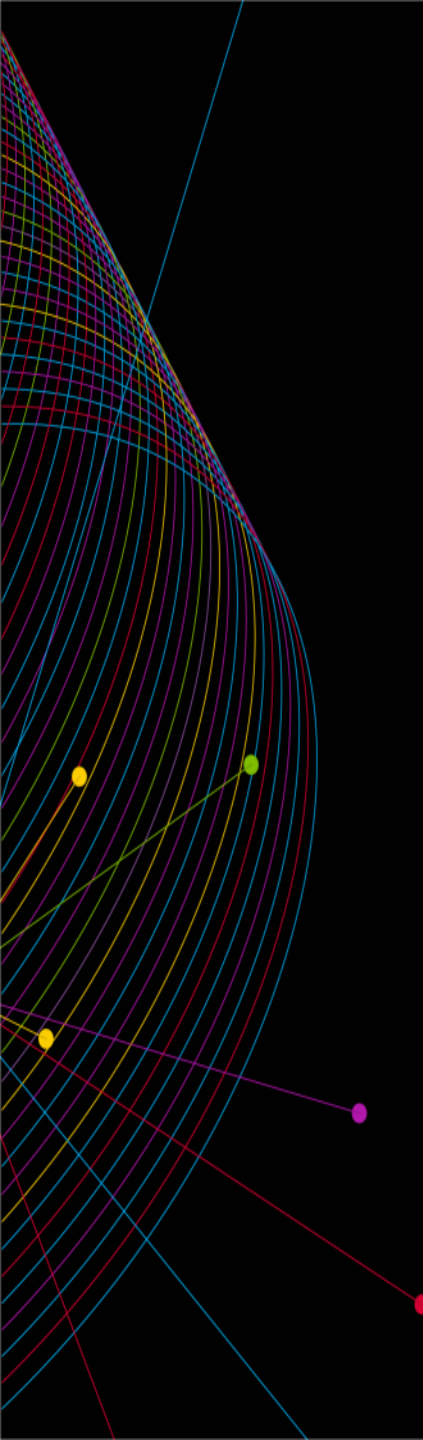**Targets:** Persons - Gender [Male]; Age [18-34]

Items 1 to 3 of 3. Page 1 of 1   ◄◄ ◄ ► ►►   Go to Page: [1 ▼]

Enter text here   [All ▼]

| Name	Level	Impressions					Total R/F/GRP				
		Total (000)	Target (000)	% in Target	% of Campaign	% of Site	Audience Reached (000)	% of 2+ Universe	Frequency	GRPs	Audience Reached (000)
VEVO	B	416	100	24	65	2.55	289	1.68	1.44	2.42	69
MCM Media	B	147	25	17	16	4.67	60	0.35	2.43	0.86	8
MTV Music Group	B	218	30	14	19	7.98	61	0.36	3.57	1.27	9
Sum/Average		781	155	22	100	3.52	436	2.54	1.79	4.55	90 3.6

THE E-GENERATION REPORT
HOW KIDS AND TEENS ARE USING THE INTERNET

NIELSEN AUSTRALIAN E-GENERATION REPORT

The Nielsen Australian e-Generation Report aims to get you closer to understanding behaviours, attitudes and evolving patterns of kids and teens' media consumption and device usage.

E-Generation is a comprehensive study of the way Australian kids and teens use and consider media content, its role in their lives, and their rapid rate of adoption of connected devices such as tablets, mobile phones, media players, games consoles and PCs/laptops.
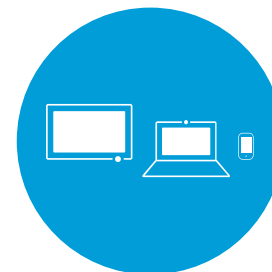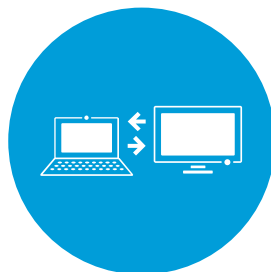
We are currently registering expressions of interest including sponsorship prior to commissioning this report. Reach out to your Nielsen Account Manager for more information or email careau@nielsen.com .

nielsen

AN UNCOMMON SENSE
OF THE CONSUMER™

CONTACT

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