



nielsen

THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

FOR THE MONTH OF JULY 2013



FOREWORD

A message from Monique Perry

With Matt Bruce moving onwards and upwards to take an exciting role with Nielsen in New York, I am excited to have been appointed Head of the Media Industry Group for Nielsen Australia.

I've been with Nielsen for 17 years and was part of the team that launched Nielsen NetRatings back in 1999. I am thrilled with the opportunity to lead Nielsen's dynamic and passionate Media Industry Group and look forward to continuing to work closely with you.

Many of you would have seen PWC's recent forecast that between 2012 and 2017, online advertising revenue in Australia will grow by 57 percent, or in real terms – an additional \$1.8 billion. In fact, digital advertising revenues have already surpassed free-to-air television for the first time, eclipsing \$1.88 Billion for the 6 months to June 30.

In line with this, Nielsen continues to focus and invest in being the cornerstone for this growth, ensuring transparent and effective measures are in place for the ever-changing digital advertising industry.



Monique Perry: Head of
Media, Nielsen, Australia

(continued)

To this end, I also welcome long-time Nielsen colleague Dr Stuart Pike (pictured) to the newly created role of Executive Director, Digital Audience Measurement. Stuart is formerly Head of our Marketing Effectiveness Practice as well our joint venture with Mckinsey & Co, and holds a wealth of experience in digital - he in fact started his media career with News Interactive (now News Corp) many years ago.

Stuart will be tasked with ensuring our digital product suite continues to adapt and expand to the changing digital environment whilst making certain that our development efforts remain aligned with the needs and priorities of you, our clients.

We are truly grateful for the support and also the vigilance of the entire industry in helping us achieve this. I welcome any feedback you may have and both Stuart and I look forward to working with each of your businesses.

Best Regards,

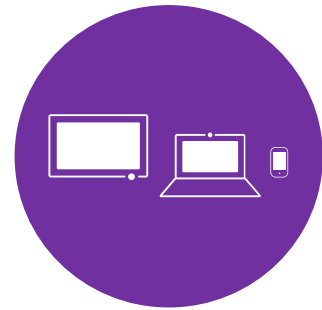
Monique Perry
Head of Media, Nielsen Australia

Dr Stuart Pike: Executive
Director, Digital Audience
Measurement, Nielsen, SEANAP



STATE OF THE ONLINE LANDSCAPE

JULY 2013



Welcome to the July 2013 edition of Nielsen's Online Landscape Review. This month we explain how to get the most out of the geo-target functionality within Nielsen Market Intelligence, explore 'custom rollups' in Nielsen Online Ratings – Hybrid and reveal key audience trends for the month.

In July 2013, the number of active online Australians continued to grow to new heights, with some 17.2 million people consuming web content. Broken down, this equated to an average of 38 hours per person across 60 browser sessions.

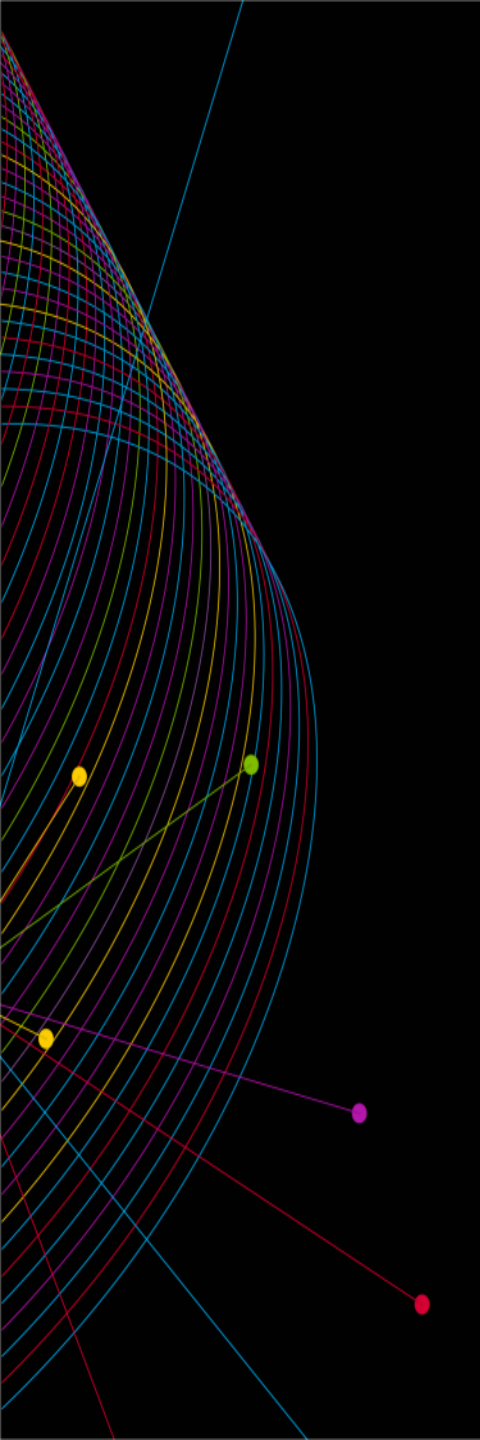
From Market Intelligence, we continue to gain insights into the proportion of traffic that is coming from mobile and tablet devices, to online publishers and networks. Approximately 1.3 billion page impressions were generated by mobile and tablet combined in July 2013 – equal to almost 25 percent of total traffic.

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



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, purple, red) are placed on the surface of the sphere, with thin lines extending from them towards the right. The background is black.

OUR INSIGHTS: THE NIELSEN PERSPECTIVE



“Did you know? 7.3 million
Australians use Facebook on
mobile everyday.”

AT A GLANCE: THE ONLINE LANDSCAPE

During the month of July 2013:

- A unique audience of **17.2 million** Australians online
- **31.8 billion** pages were viewed online
- **40 billion minutes** were spent online
- The average user spent **38 hours online** spread across **60 sessions**
- There were **808 million mobile page impressions**



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 (blue, green, yellow, red, purple). Several colored dots (yellow, green, purple, red) are placed on the surface of the sphere, with thin lines extending from them towards the center or other points on the sphere.

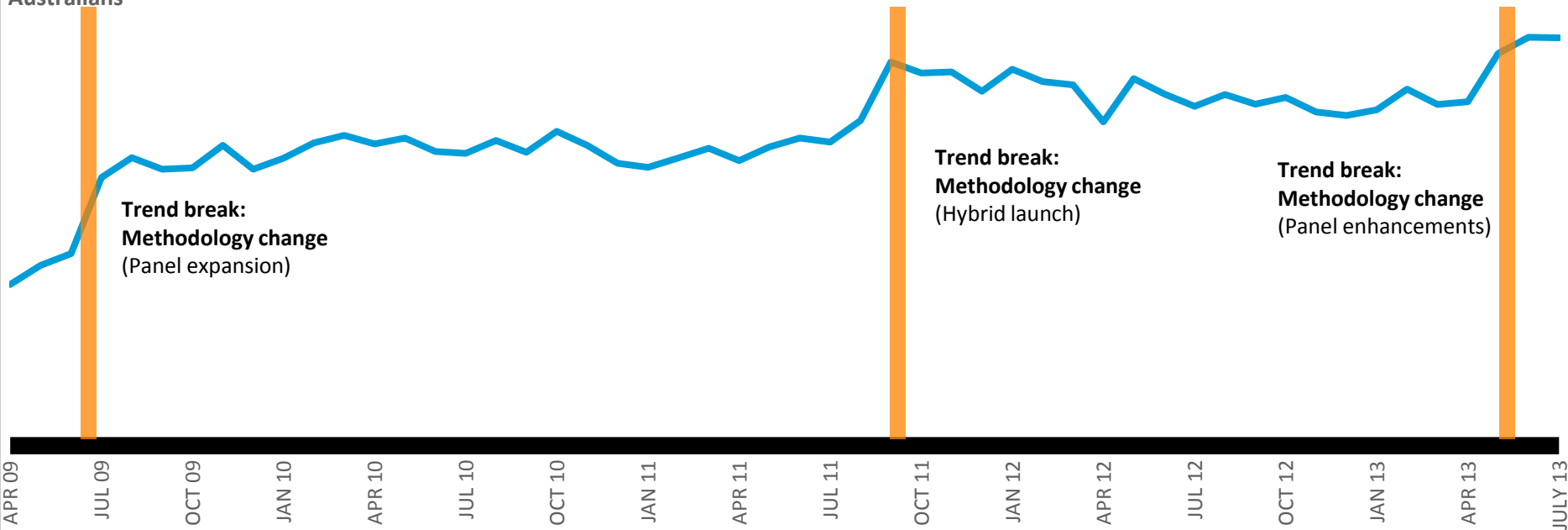
THE ONLINE UNIVERSE: JULY 2013

NIELSEN ONLINE RATINGS: HYBRID

ONLINE AUDIENCE TREND - JULY 2013

April 2009-
12.4 million
Australians

July 2013-
17.2 million
Australians



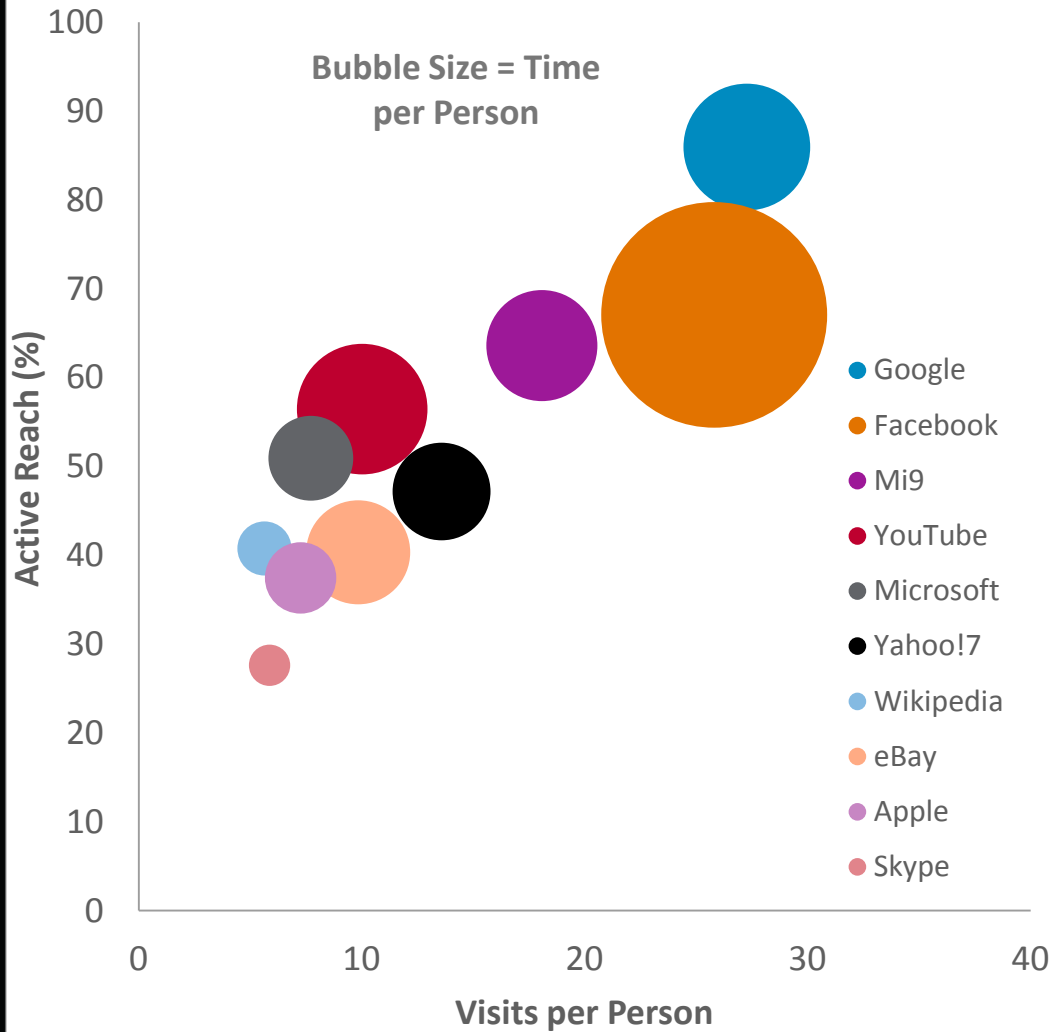
TOP 10 BRANDS BY UNIQUE AUDIENCE* – JULY 2013

Brands	Unique Audience (000s)	Page Views (000s)	Average Time Spent (HH:MM:SS)
Google	14,738	3,397,084	03:00:52
Facebook	11,500	3,906,139	09:33:45
Mi9	10,906	1,362,290	02:18:41
YouTube	9,682	877,632	03:12:28
Microsoft	8,733	45,307	01:20:49
Yahoo!7	8,092	536,627	01:47:19
Wikipedia	6,991	158,020	00:32:50
eBay	6,915	1,075,813	02:01:31
Apple	6,421	34,588	00:57:15
Ask Search Network	4,737	74,312	00:19:16

*Including Applications that access the internet

Source: Nielsen Online Ratings – Hybrid, July 2013

TOP 10 BRANDS BY STICKINESS – JULY 2013



Brands	Active Reach %	Visits Per Person	Time Per Person
Google	85.96	27.27	03:00:52
Facebook	67.07	25.81	09:33:45
Mi9	63.61	18.08	02:18:41
YouTube	56.47	10.02	03:12:28
Microsoft	50.93	7.72	01:20:49
Yahoo!7	47.20	13.58	01:47:19
Wikipedia	40.77	5.63	00:32:50
eBay	40.33	9.84	02:01:31
Apple	37.45	7.26	00:57:15
Skype	27.63	5.86	00:19:16

AGE DEMOGRAPHICS ONLINE – JULY 2013

2-17

Percentage of Online Aus

7.4%

Average Page Views

501

Avg Time Per Person*

13:10

18-24

Percentage of Online Aus

11.3%

Average Page Views

1,890

Avg Time Per Person*

43:10

25-34

Percentage of Online Aus

19.2%

Average Page Views

2,197

Avg Time Per Person*

45:50

35-49

Percentage of Online Aus

28.6%

Average Page Views

2,101

Avg Time Per Person*

43:21

50+

Percentage of Online Aus

33.6%

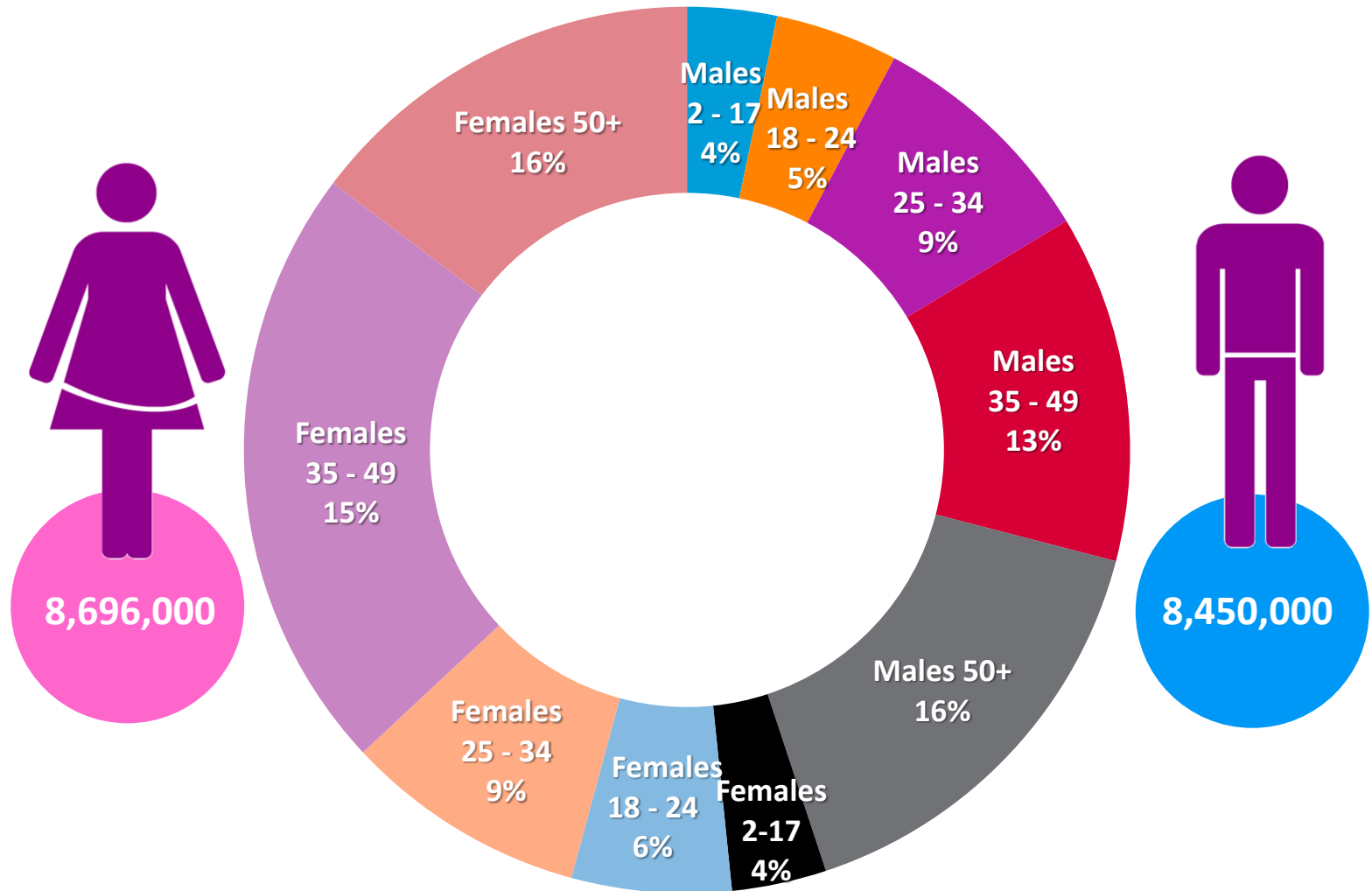
Average Page Views

1,739

Avg Time Per Person*

38:36

GENDER BREAKDOWN – JULY 2013



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, green, purple, red) are placed on the sphere, with thin lines extending from them towards the center of the sphere.

THE ONLINE UNIVERSE: JULY 2013

NIELSEN ONLINE RATINGS: HYBRID STREAMING

“

Online advertising revenues
increased 14.6% during the 12
months ended 30 June 2013

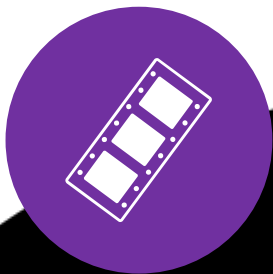
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HYBRID STREAMING KEY ONLINE STATISTICS – JULY 2013

Nielsen Online Ratings – Hybrid Streaming, 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 July 2013:

- **12.5 million** Australians streamed online videos
- A grand total of **1.36 billion** streams were viewed
- **4 billion** minutes were spent streaming content
- On average, Australians spent **5 hours and 20 minutes** watching online video and viewed **108** streams



HYBRID STREAMING: TOP 10 BRANDS BY UNIQUE AUDIENCE - JULY 2013

Brands	Unique Audience (000s)	Total Streams (000s)	Average Time Spent (HH:MM:SS)
YouTube	10,726	910,348	03:37:08
Facebook	3,960	57,962	00:24:59
VEVO	2,627	55,515	00:44:03
Mi9	2,293	57,488	00:44:08
The CollegeHumor Network	1,781	5,428	00:09:52
Yahoo!7	1,745	13,907	00:53:05
ABC Online Network	1,159	10,704	02:00:42
smh.com.au	1,135	4,655	00:05:36
Vube	1,125	3,784	00:17:04
News.com.au	1,045	5,599	00:07:29



HYBRID STREAMING: DEMOGRAPHIC BREAKDOWN



6,347,000

Number of streaming Australians

6,174,000

784,854,000

Total number of streams viewed

570,743,000

124

Average streams viewed per month

92

05:43

Average PC time per month (HH:MM)

04:55

HYBRID STREAMING: AGE DEMOGRAPHICS – JULY 2013

2-17

Percentage of Online Aus

6.5%

Average Streams

95

Average Time (HH:MM)

05:11

18-24

Percentage of Online Aus

11.3%

Average Streams

191

Average Time (HH:MM)

10:15

25-34

Percentage of Online Aus

18.9%

Average Streams

148

Average Time (HH:MM)

07:39

35-49

Percentage of Online Aus

28.6%

Average Streams

106

Average Time (HH:MM)

04:54

50+

Percentage of Online Aus

34.6%

Average Streams

63

Average Time (HH:MM)

02:49



HOME AND FASHION: A CLOSER LOOK

Within the Home and Fashion Category, the Food & Cooking Sub Category is the most popular.

Interestingly, Food & Cooking also shares 58% of its audience with Apparel/Beauty sites, indicating significant overlap.

Unsurprisingly, the average time per person within Real Estate and Apartments is significantly higher, with 4.7 million people spending an hour and a half onsite during July.

Interestingly the Food and Cooking Subcategory, although getting the highest number of Unique Audience members, receives the second lowest number of page views per person.

Name	Unique Audience (000)	Page Views Per Person	Time Per Person (hh:mm:ss)
Food & Cooking	5,826	25	00:25:58
Apparel/Beauty	5,569	51	00:40:01
Real Estate/Apartments	4,706	91	01:31:18
Home & Garden	4,555	27	00:22:34
Multi-category Home & Fashion	1,935	16	00:11:44



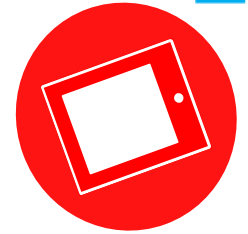
An abstract graphic on the left side of the slide. It features a series of concentric, overlapping lines in various colors (red, green, blue, yellow) that form a partial globe or sphere. Several colored dots (yellow, green, purple, red) are placed on the lines, with thin lines extending from them towards the center of the globe.

THE MOBILE UNIVERSE: JULY 2013

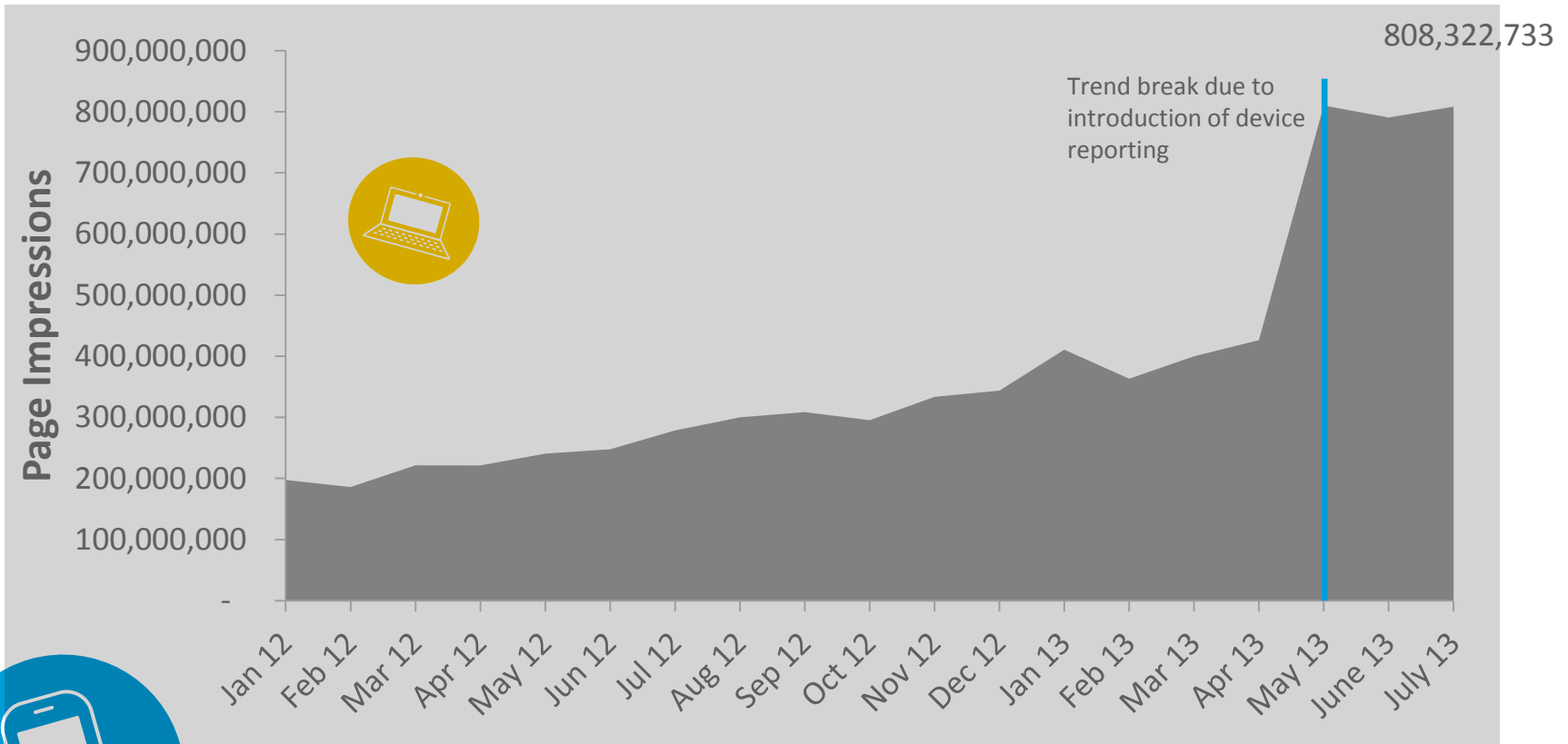
NIELSEN MARKET INTELLIGENCE



“ In the US, 70% of smartphone shoppers use a store locator to plan their shopping trip. Once they arrive at the store, 37% stay organised using lists while shopping on their phones ”

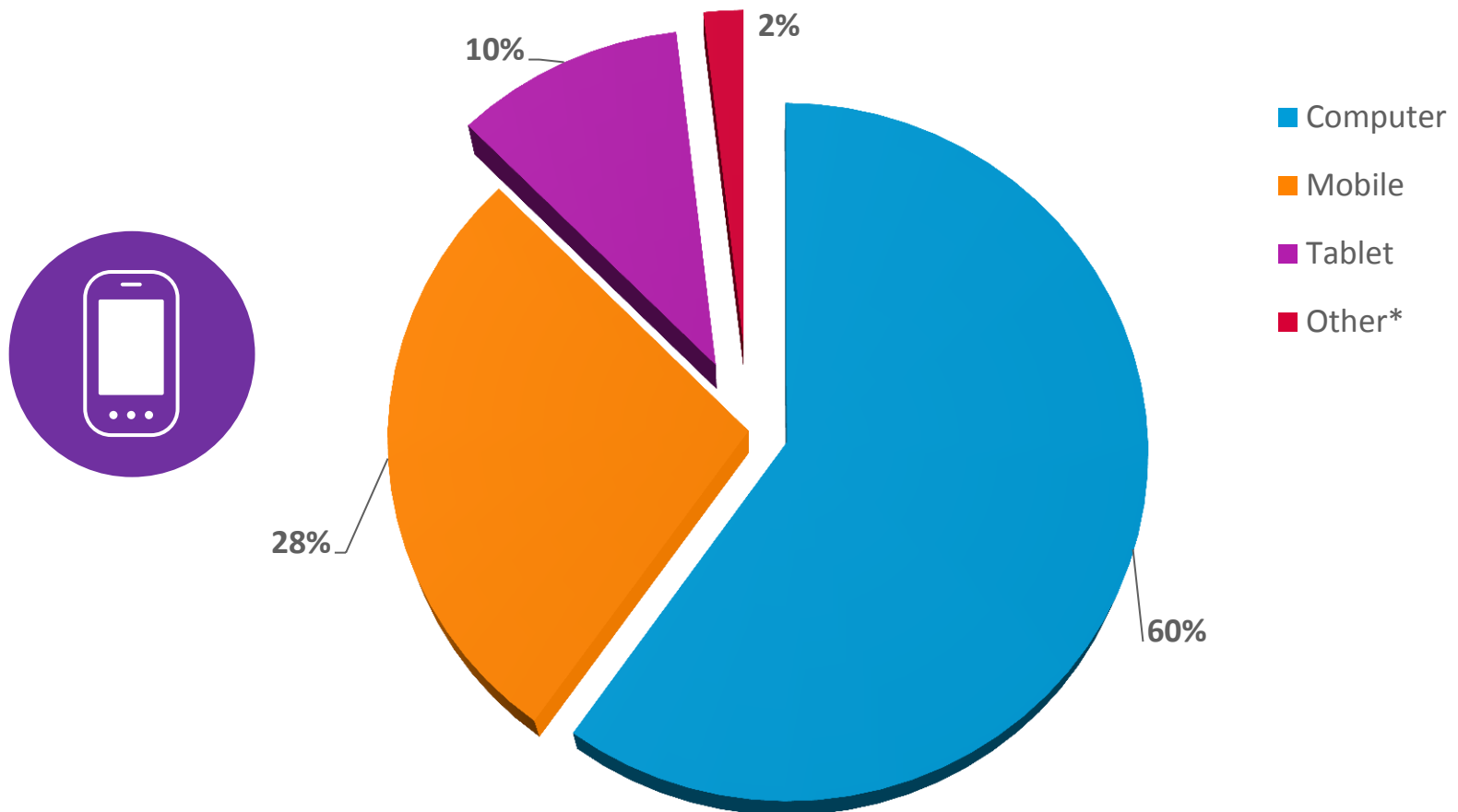


MOBILE PAGE IMPRESSIONS – JULY 2013



DEVICE TYPE COMPARISON

TOTAL AVERAGE DAILY UNIQUE BROWSERS JULY 2013

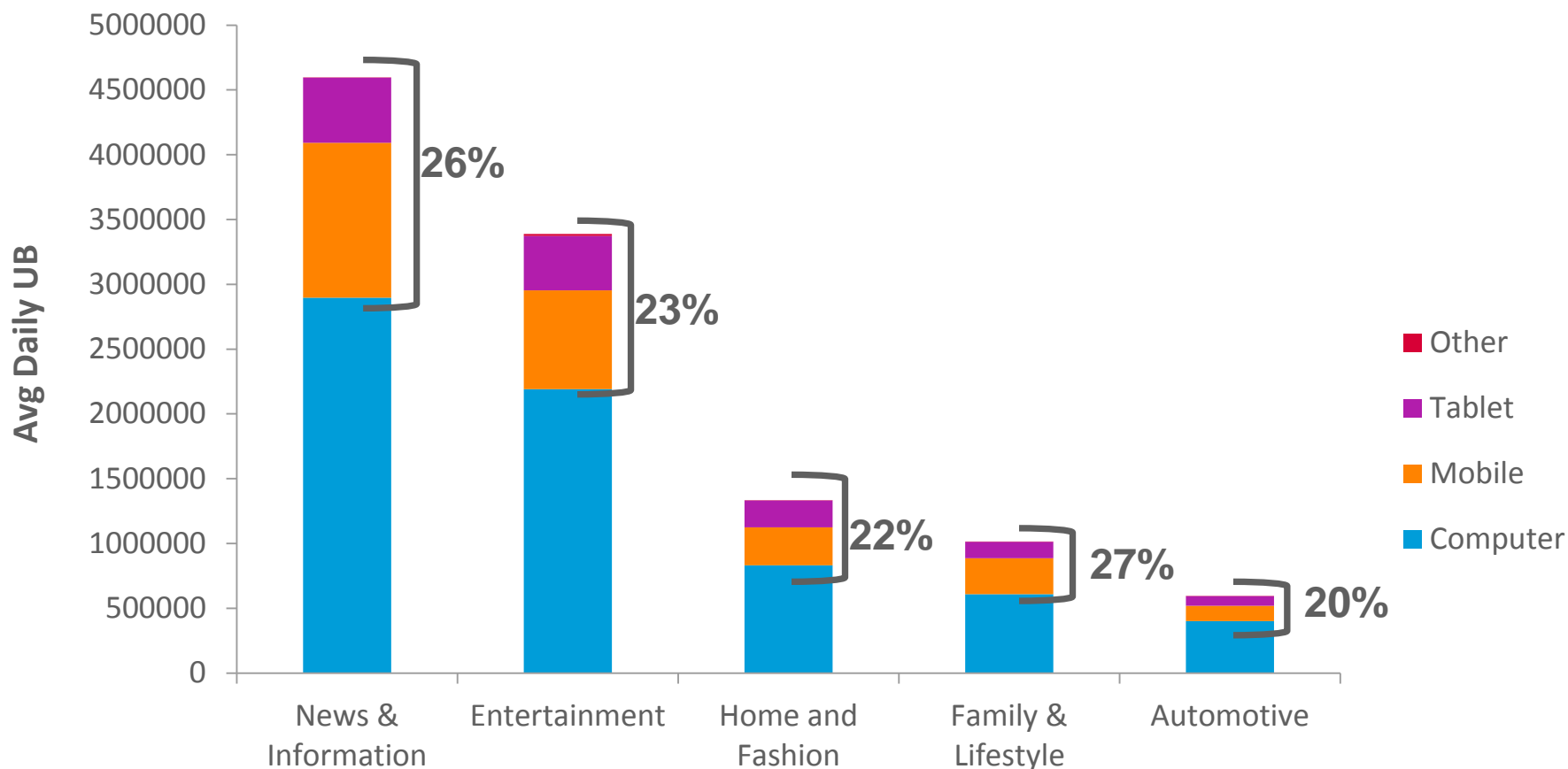


* Other is a sum of Console, Others and Unclassified devices

DEVICE REPORTING

TRENDS

A top line device type report, by category, indicates that 'Family and Lifestyle' has the highest mobile + tablet percentage of access, with 27 percent of traffic coming from either a tablet or a mobile device.



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HINTS AND TIPS FOR USING NIELSEN

HINTS AND TIPS FOR ACTIONABLE INSIGHTS



We understand that finding the right data to create insights which address your business issues can be challenging. Getting the most value out of the insights available in Nielsen Online Ratings is extremely important to us.

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 insights more actionable.

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

For all other questions regarding Nielsen's Media Industry Group, contact your account manager directly, or email: careau@nielsen.com



NIELSEN MARKET INTELLIGENCE – GEO TARGETING

The objective of the Geo Target module is to provide users of Market Intelligence with ranking data for each asset (brand, publisher, site, category) by location.

Users are able to review and compare asset performance with visibility across location of browsers to gain a more accurate picture of traffic. A common example of this would be users reporting on the browser location for a particular asset and being able to clearly identify the high and low density areas of activity.

The metrics that can be used to rank assets within the Geo Target module are:

- Unique Browsers
- Unique Browsers Change
- Page Impressions
- User Sessions
- Unique Browser Frequency
- User Session Duration
- Page Duration



Market Domain: Australia - Domestic Traffic

Ranking Trend History **Geo target** Duplication Demographics Adv demographics Ext Duplication Device

Generate Report don't collapse

1 Select report period :
 Daily
 Weekly
 Monthly

2 Including date:
 From: 01/08/13

3 Select report type :
 By Brand
 By Publisher
 By Category
 By Category Sites
 All Sites

4 Select brand: [input] x expand view | select all | clear

Market Aggregate
 111 Hits [MCN]
 12th Street Universal [MCN]
 1688.com.au [Spots & Space]
 2CH 1170
 2GB 873AM
 2KY [ignite]
 2threads [Inception Digital]
 2UE

5 Select data : website

6 Select geo filter : By State

7 Select geo location : Please select a geo location

Data available up to 20/08/13

Generate Latest Report >> Generate Report >>

NIELSEN MARKET INTELLIGENCE – GEO TARGETING

SiteCensus

Market Intelligence

Ranking Trend History **Geo target** Duplication Demographics Adv demographics Ext Duplication Device

The Geo Target module is located in the tab banner at the top of the Market Intelligence reporting screen (see image above).



5 Select data : website

6 Select geo filter :

7 Select geo location :

Once the Geo Target module is active, a user can then select a geo filter and geo location (see left image). Note that as this module sits within the Market Domain – Australia Domestic Traffic, geo location analysis is limited to Australia, broken down by state, only.

Traffic location is determined by the IP address received by our servers, which is then matched against an IP address database.

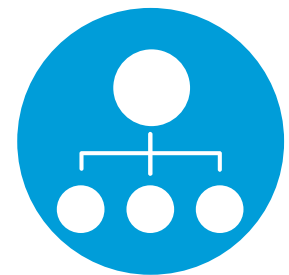
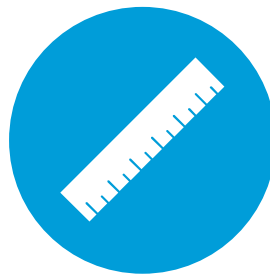
NIELSEN ONLINE RATINGS – CUSTOM ROLLUPS

A Custom Rollup allows clients to create a consolidation of any domain or URL for the purpose of non-syndicated reporting. This is most useful for online ad networks and publishers who wish to package their online properties together in a way that is more reflective of commercial reality, as they can not fit into the default Parent/Brand/Channel hierarchy.

Custom Rollups are not allocated to a category as by their nature, they can contain any mix of sites across multiple categories.

Clients may use the data contained within the Custom Rollup to illustrate their unique business models or partnering relationships. However, client public use of this data must clearly state that this is non-standard aggregation and that relative rankings within a category of sites may be affected by the custom nature of this aggregation.

All Custom Rollup enquiries and requests can be directed to your Nielsen Account Manager. Nielsen makes no claim as to the correctness of the custom aggregations but does certify the measurement traffic data as accurate.



NIELSEN ONLINE RATINGS – CUSTOM ROLLUPS

Custom Rollups are only available for Hybrid Surfing data and can be used in Ranking and Web Traffic Reports, as well as all Standard Reports with the exception of Reach and Frequency reporting. They can be added at the Entities selection step of both Quick and Standard Reports (respective screenshots below).


Report Layout

- Ranking
- Active Universe
- Average Usage
- Referral/Destination/Top Pages
- WebTraffic

Selections

Country:

Audience:

Measurement Period: 

Dataset:

Entities - Ranking

Entities:

- Include Applications
- Only Ad Supported
- Only Non Adult
- Only Census Enabled

Entities:


Browse Search

Available Items

- All Parents
- All Brands
- All Channels
- All Categories
- All Subcategories
- All Applications
- All Custom Rollups

Add to Selected

Entities

Items 1 to 100 of 327 

Name	Level	Unique Audience	Association
Telstra	Custom Property		
News Corp. Online	Custom Property		
AD - News Australia Netwo	Custom Property		
MSN	Custom Property		

Add to Selected



nielsen
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AN UNCOMMON SENSE
OF THE CONSUMER™

CONTACT

careau@nielsen.com

www.nielsen.com/au/

(02) 8873 7000