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THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

FOR THE MONTH OF AUGUST 2013

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STATE OF THE ONLINE LANDSCAPE

AUGUST 2013

Welcome to the August 2013 edition of Nielsen's Online Landscape Review. This month we demonstrate how to run category reports in the Digital Content Measurement interface and explain the Parent/Brand/Channel hierarchy we use within Nielsen Online Ratings – Hybrid.

We also share some deeper insights into the Member Communities category from Nielsen Online Ratings to see which social networks online Australians are most engaged with and how this has changed over the past 12 months.

In August 2013 there were 16.7 million Australians actively online, down 3% on July 2013. Broken down, this equated to an average of 37 hours per person (an increase of 1 hour on July 2013) across 60 browser sessions.

From Market Intelligence, we again provide the latest figures around total mobile page impressions and access by different devices.

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

Source: Nielsen Online Ratings – Hybrid, August 2013; Nielsen Market Intelligence, August 2013

OUR DATA: THE NIELSEN PERSPECTIVE

Online advertising expenditure in the 6 months to 30th June 2013 exceeded FTA TV advertising revenues for the first time ($1.883B vs $1.805B)

AT A GLANCE: THE ONLINE LANDSCAPE

In the month of August 2013:

- A Unique Audience of **16.7 million** Australians online

- **30.4 billion** pages were viewed online

- **37.6 billion minutes** were spent online

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

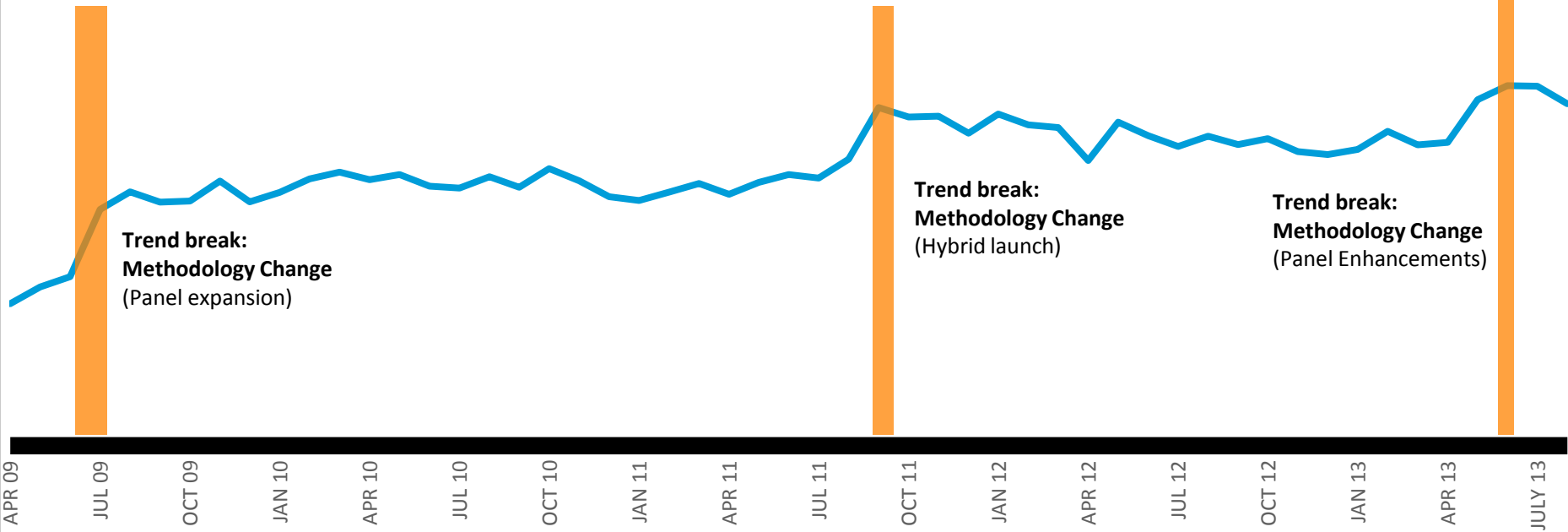- There were **815 million mobile page impressions**

THE ONLINE UNIVERSE: AUGUST 2013
NIELSEN ONLINE RATINGS: HYBRID

ONLINE AUDIENCE TREND - AUGUST 2013

April 2009 - 12.4 Million Australians

August 2013 - 16.7 million Australians

Trend break: Methodology Change (Panel expansion)

Trend break: Methodology Change (Hybrid launch)
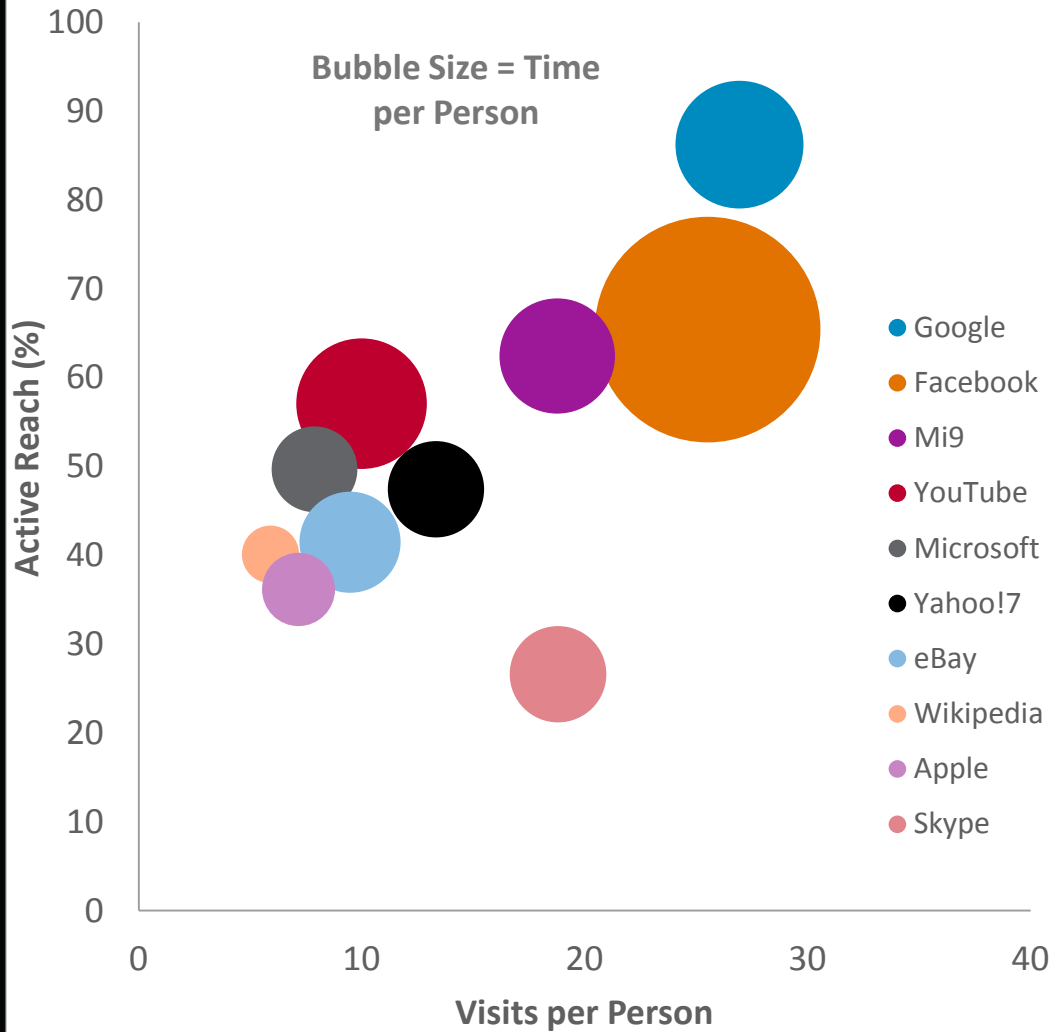
Trend break: Methodology Change (Panel Enhancements)

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 JULY 13

Source: Nielsen Online Ratings – Hybrid, August 2013

TOP 10 BRANDS BY UNIQUE AUDIENCE* – AUGUST 2013

Brands	Unique Audience (000s)	Page Views (000s)	Average Time Spent (HH:MM:SS)
Google	14,399	3,290,270	02:55:14
Facebook	10,920	3,613,360	09:05:46
Mi9	10,425	1,303,155	02:22:27
YouTube	9,528	855,748	03:02:47
Microsoft	8,294	40,113	01:18:35
Yahoo!7	7,920	513,401	01:39:40
eBay	6,923	985,317	01:49:27
Wikipedia	6,694	170,088	00:35:22
Apple	6,038	28,381	00:57:13
Skype	4,445	5,125	01:39:46

*Including Applications that access the internet

TOP 10 BRANDS BY STICKINESS – AUGUST 2013

Bubble Size = Time per Person

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

Y-axis: Active Reach (%)
X-axis: Visits per Person

Brands	Active Reach %	Visits Per Person	Time Per Person
Google	86.24	26.94	2:55:14
Facebook	65.41	25.51	9:05:46
Mi9	62.44	18.77	2:22:27
YouTube	57.07	9.99	3:02:47
Microsoft	49.68	7.88	1:18:35
Yahoo!7	47.44	13.33	1:39:40
eBay	41.47	9.47	1:49:27
Wikipedia	40.10	5.91	0:35:22
Apple	36.17	7.16	0:57:13
Skype	26.62	18.8	1:39:46

Source: Nielsen Online Ratings – Hybrid, August 2013

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AGE DEMOGRAPHICS ONLINE – AUGUST 2013

2-17

Percentage of Online Aus	7.4%
Average Page Views	483
Avg Time Per Person*	11:43

18-24

Percentage of Online Aus	11.5%
Average Page Views	1,800
Avg Time Per Person*	39:41

25-34

Percentage of Online Aus	19.3%
Average Page Views	2,235
Avg Time Per Person*	43:17

35-49

Percentage of Online Aus	28%
Average Page Views	2,047
Avg Time Per Person*	42:05

50+

Percentage of Online Aus	32%
Average Page Views	1,695
Avg Time Per Person*	35:23

*HH:MM

GENDER BREAKDOWN – AUGUST 2013
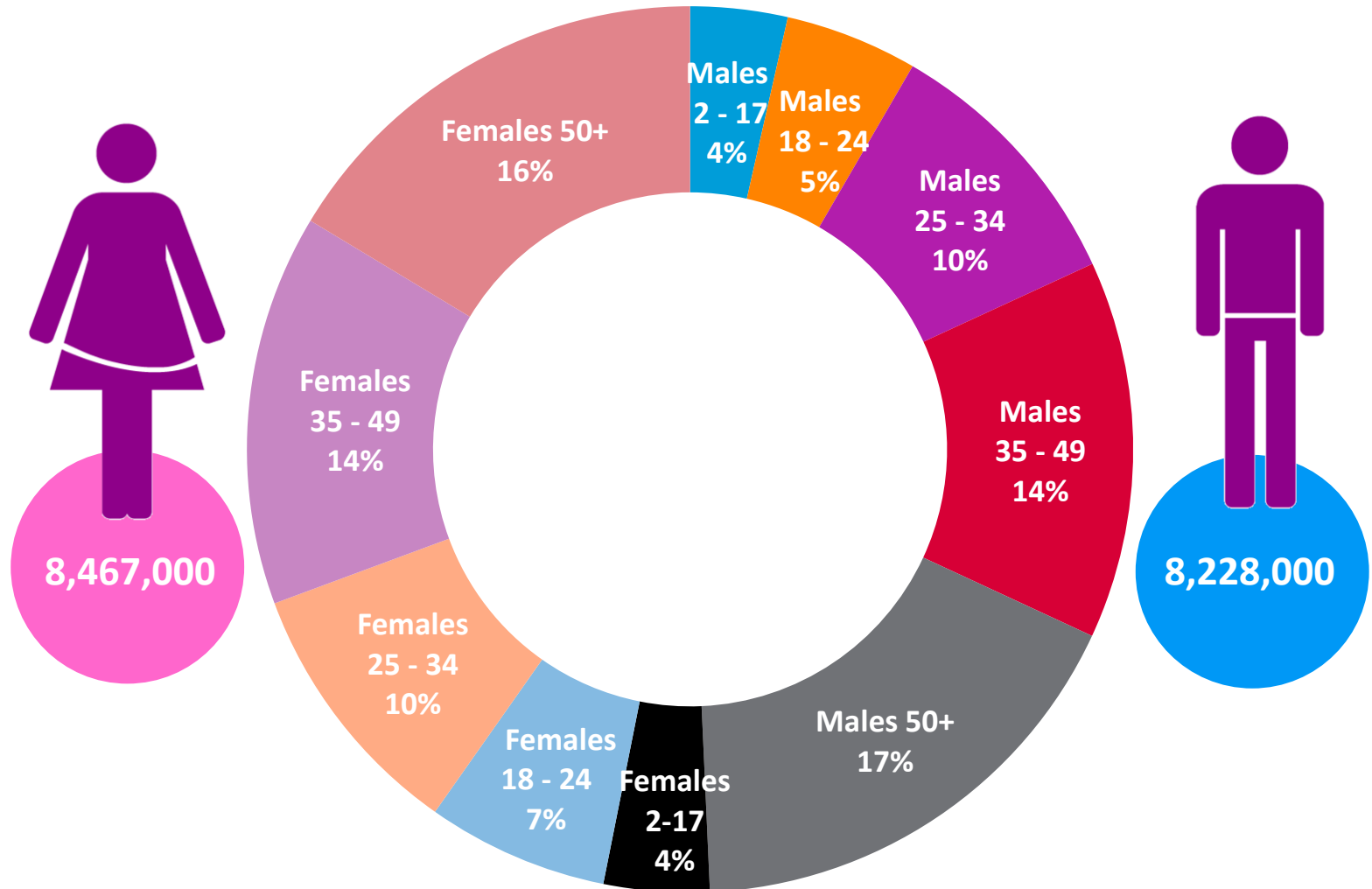
Females 50+ 16%

Females 35 - 49 14%

8,467,000

Females 25 - 34 10%

Females 18 - 24 7%

Females 2-17 4%

Males 2 - 17 4%

Males 18 - 24 5%

Males 25 - 34 10%

Males 35 - 49 14%

Males 50+ 17%

8,228,000

Source: Nielsen Online Ratings – Hybrid, August 2013

NIELSEN ONLINE RATINGS – HYBRID
CATEGORY SPOTLIGHT: MEMBER COMMUNITIES
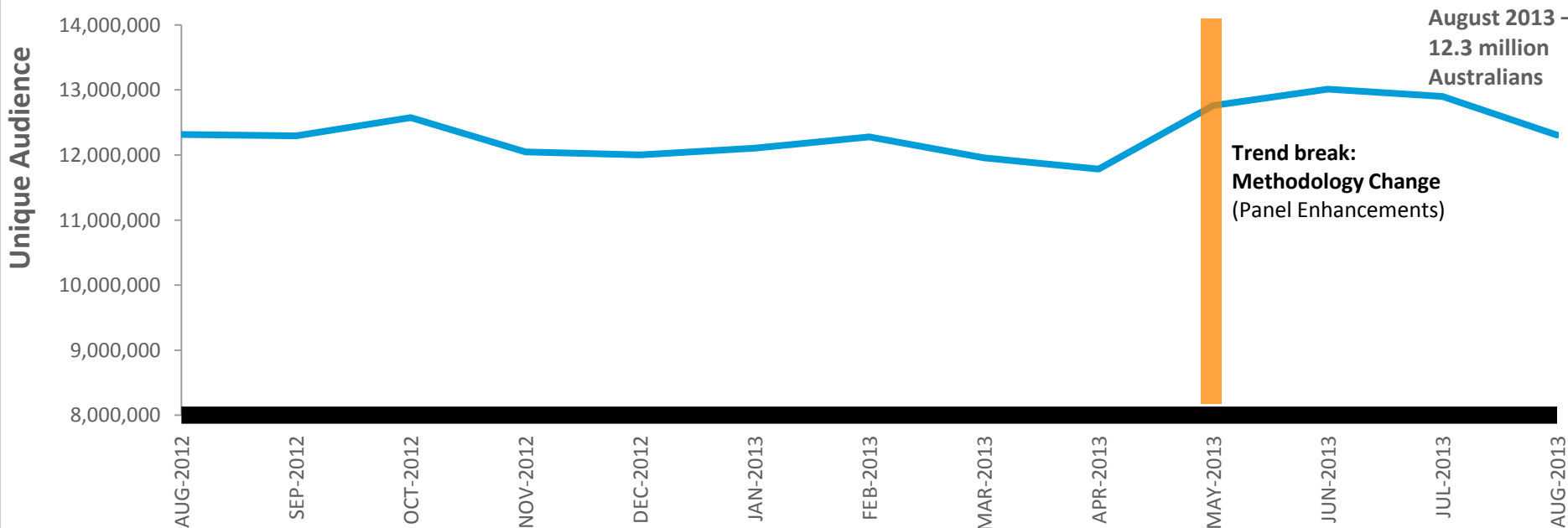
TOP 10 MEMBER COMMUNITIES BY STICKINESS – AUGUST 2013

Bubble Size = Time per Person

Active Reach (%) vs **Visits per Person**

- Facebook
- Blogger
- WordPress.com
- LinkedIn
- Twitter.com
- Google+
- Tumblr
- Pinterest
- BuzzFeed
- Reddit
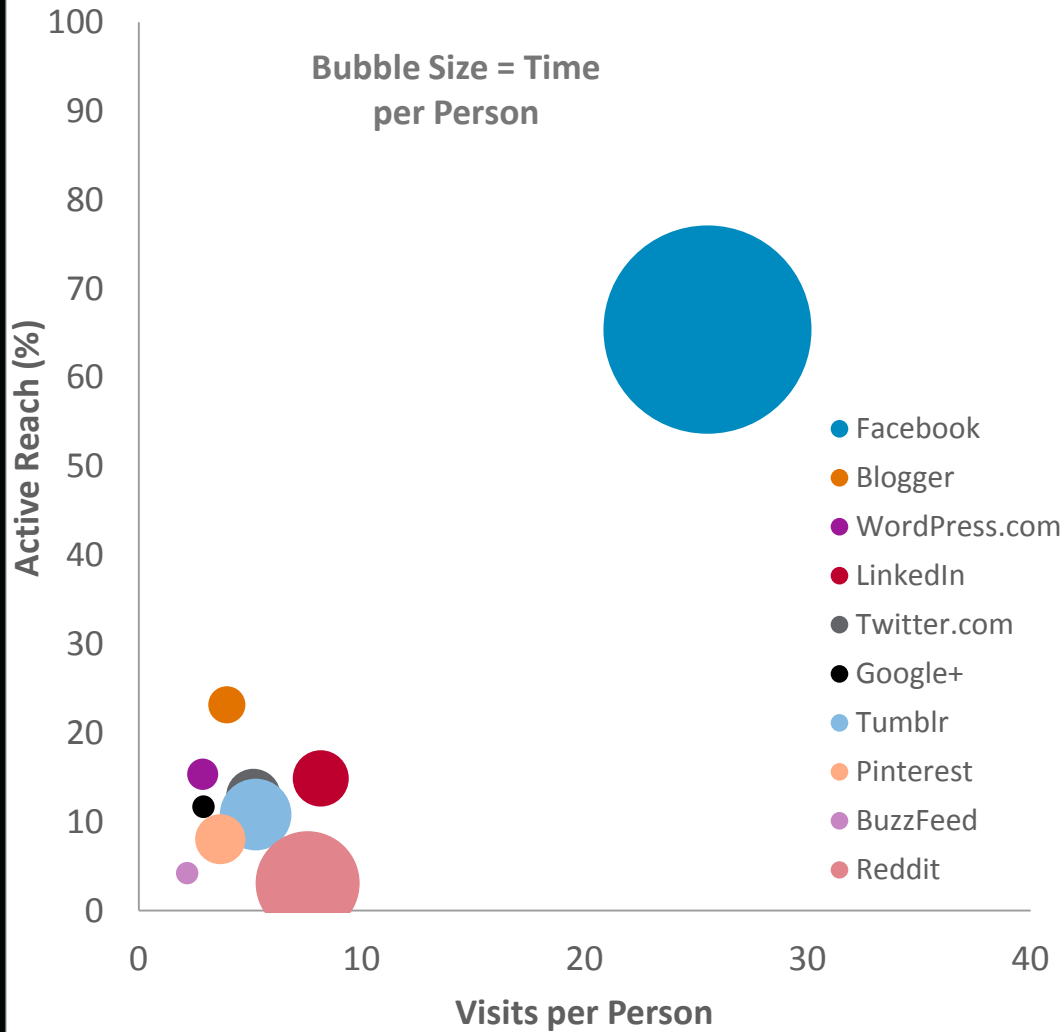
Brands	Active Reach %	Visits Per Person	Time Per Person
Facebook	65.41	25.51	09:05:46
Blogger	23.18	3.95	00:17:33
WordPress.com	15.36	2.86	00:12:13
LinkedIn	14.89	8.16	00:39:47
Twitter.com	12.90	5.14	00:37:18
Google+	11.70	2.29	00:06:29
Tumblr	10.83	5.24	01:04:55
Pinterest	8.05	3.65	00:31:41
BuzzFeed	4.23	2.17	00:06:25
Reddit	3.09	7.57	02:16:38

MEMBER COMMUNITIES: AUDIENCE TRENDS

The Member Communities category is mostly made up of social media networks and has remained relatively stable overall for the past 12 months. That said, some major changes have occurred among individual sites:

- **Facebook** is still the category leader, with a Unique Audience of 10.9 million in August 2013.
- **BuzzFeed** has seen the largest growth in audience over the past 12 months, at 53% to give a total of 706,000 placing it 7th in the category overall. This was followed by **Reddit** and **Pinterest** at 27% and 22% respectively.
- **Myspace**, a dominant site in the category 4+ years ago, continues it decline with a 178% fall in audience year-on-year to a total of 241,000 people in August 2013.
- On average, active online Australians spent a total of **9 hours** viewing Member Community sites in August 2013.

August 2013 – 12.3 million Australians

Trend break: Methodology Change (Panel Enhancements)

THE ONLINE UNIVERSE: AUGUST 2013
NIELSEN ONLINE RATINGS:
HYBRID STREAMING

> **Set-top box Video-On-Demand is available in about 60% of US TV households, up from 37% in 2008**

HYBRID STREAMING KEY ONLINE STATISTICS – AUGUST 2013

In the month of August 2013:

- **12.3 million** Australians streamed online videos

- A grand total of **1.3 billion** streams were viewed

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

- On average, Australians spent **5 hours** and **17 minutes** watching online video and viewed **110 streams**
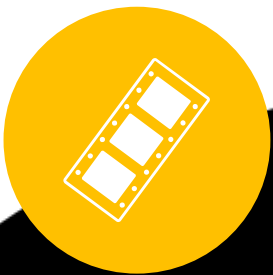
HYBRID STREAMING: TOP 10 BRANDS BY UNIQUE AUDIENCE – AUGUST 2013

Brands	Unique Audience (000s)	Total Streams (000s)	Average Time Spent (HH:MM:SS)
YouTube	10,552	891,320	03:37:38
Facebook	3,708	58,220	00:23:54
VEVO	2,522	52,167	00:46:39
Mi9	2,303	72,911	01:04:18
The CollegeHumor Network	1,726	5,092	00:10:57
Yahoo!7	1,497	17,032	01:06:27
ABC Online Network	1,312	13,134	01:48:14
Vube	965	3,247	00:16:23
smh.com.au	962	3,838	00:06:10
news.com.au	935	3,845	00:05:38

HYBRID STREAMING: DEMOGRAPHIC BREAKDOWN

Male		Female
6,215,000	Number of Streaming Australians	6,067,000
740,604,000	Total Number of Streams Viewed	604,417,000
119	Average Streams viewed per month	100
05:14	Average PC time per month (HH:MM)	05:19

Source: Nielsen Online Ratings – Hybrid Streaming, August 2013

HYBRID STREAMING: AGE DEMOGRAPHICS – AUGUST 2013

2-17
Percentage of Online Aus	5.9%
Average Streams	116
Average Time (HH:MM)	6:04

18-24
Percentage of Online Aus	11.1%
Average Streams	199
Average Time (HH:MM)	10:47

25-34
Percentage of Online Aus	20%
Average Streams	141
Average Time (HH:MM)	6:52

35-49
Percentage of Online Aus	28.5%
Average Streams	102
Average Time (HH:MM)	5:05

50+
Percentage of Online Aus	34.5%
Average Streams	67
Average Time (HH:MM)	2:35
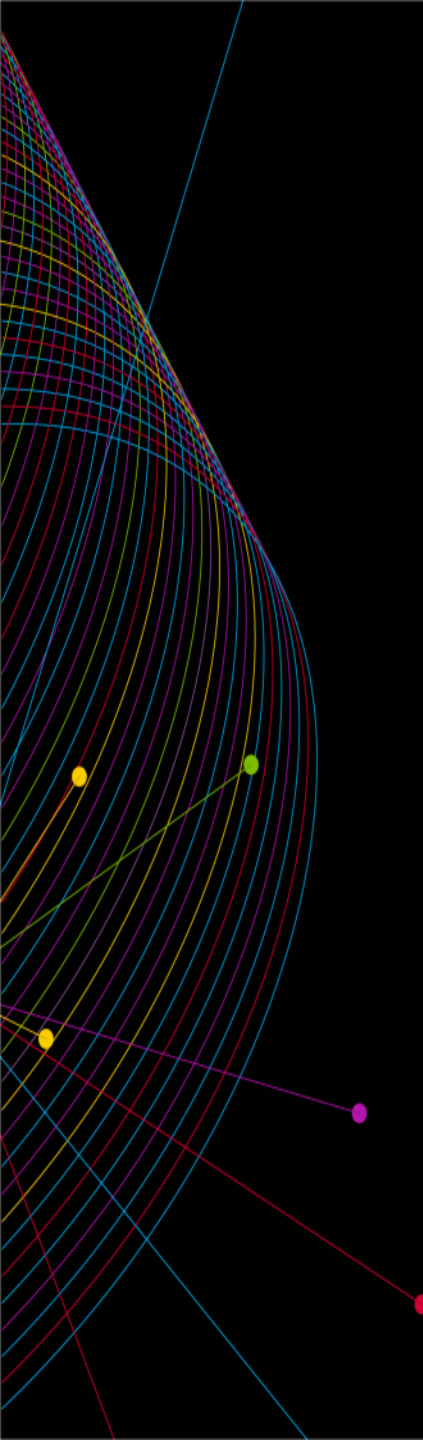
Source: Nielsen Online Ratings – Hybrid Streaming, August 2013

THE MOBILE UNIVERSE: AUGUST 2013
NIELSEN MARKET INTELLIGENCE

The mobile advertising market in Australia is the fastest growing component of the digital sector, with 190% growth over FY12 to reach $138m for FY13
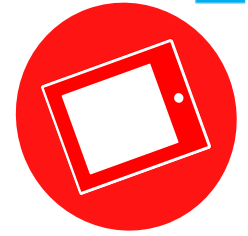
MOBILE PAGE IMPRESSIONS – AUGUST 2013

Page Impressions (y-axis)

- 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
- -

Trend Break due to Introduction of Device Reporting

814,800,396

x-axis: 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 13, July 13, Aug 13

Source: Nielsen Market Intelligence August 2013

DEVICE TYPE COMPARISON
TOTAL AVERAGE DAILY UNIQUE BROWSERS AUGUST 2013

11%

1%

28%

60%

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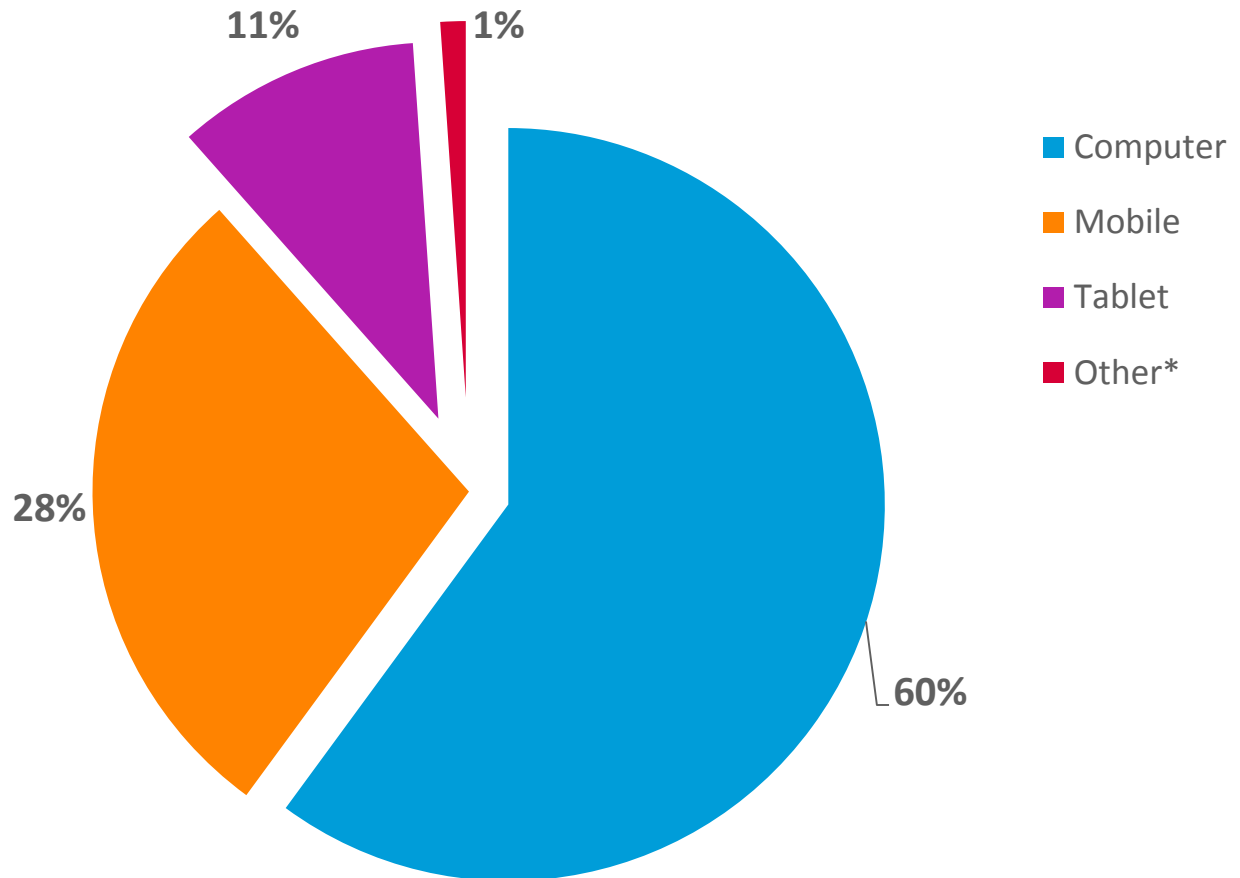
* Other is a sum of Console, Others and Unclassified devices

Source: Nielsen Online Ratings - Market Intelligence August 2013

HINTS AND TIPS FOR USING NIELSEN DATA

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

NIELSEN ONLINE RATINGS – CATEGORY REPORTING

Category reporting allows competitive ranking of sites within a particular content category or genre. This permits comparison of similar sites and their effectiveness at reaching audience of a particular size or demographic (if a target is applied). Below and on the following page, we have included screenshots to demonstrate how to build a category report.
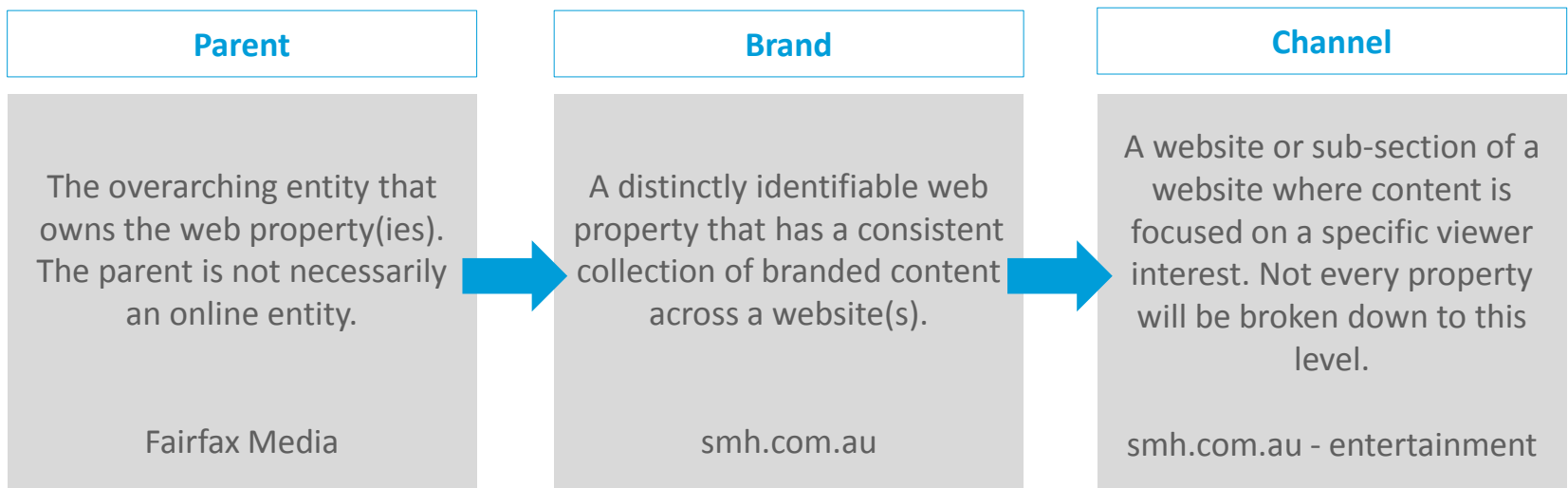
NIELSEN ONLINE RATINGS – HYBRID: REPORTING HIERARCHY

The Parent/Brand/Channel structure used in Nielsen Online Ratings (NOR) provides:

• Buyers of online advertising insights into their purchasing options by focusing on the available audience within a specific demographic target and/or content segments (categories).

• Sellers of online advertising an "apples to apples" comparison of their content-specific opportunity vs. competitive opportunities for audiences of similar viewer interest.

• Insights into an online entity's breadth of site ownership and content.

Requests to amend or add entities to this structure are reviewed and decided by our classification team in accordance with our detailed guidelines.

| Parent	Brand	Channel
The overarching entity that owns the web property(ies). The parent is not necessarily an online entity.	A distinctly identifiable web property that has a consistent collection of branded content across a website(s).	A website or sub-section of a website where content is focused on a specific viewer interest. Not every property will be broken down to this level.
Fairfax Media	smh.com.au	smh.com.au - entertainment

ONLINE CAMPAIGN RATINGS UPDATE

OCR PRODUCT NEWS

Joint OCR + Online Brand Effect (OBE) tags have arrived

Clients can now download joint OCR + OBE tags from the OBE interface (for those unfamiliar with OBE, you can read more here). This greatly simplifies the campaign tagging process and allows efficient dual measurement of campaigns for OCR and OBE.
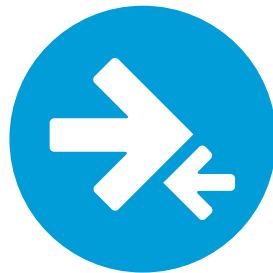
OCR Reporting API is now open for business

We are now able to switch on the reporting API functionality for eligible clients that want data fed directly into their internal dashboards. For eligibility criteria, contact your Nielsen Account Manager.

Contact your Nielsen Account Manager to find out more

SHOP NIELSEN

SHOP NIELSEN: UNCOMMON INSIGHT IS NOW AVAILABLE ONLINE.

As we continue to focus on delivering insights and information that get you closer to the consumer, we are thrilled to introduce a new digital client experience, Shop Nielsen, providing you with anywhere, anytime access to Nielsen insights, combined with the convenience of online purchasing capabilities.

As a valued client, you're invited to take an exclusive sneak preview of this new online offering from Nielsen, where you can download the latest consumer trends and habits hailing from here in Australia and delivered via Nielsen's network in over 100 countries around the world. To explore our extensive range of thought leadership and consumer insights, visit http://www.shopnielsen.com/reports.

We trust you find Shop Nielsen a useful source for actionable insights to help drive the growth and success of your business.

If you have any queries related to Shop Nielsen, please don't hesitate to contact your Nielsen Account Manager or email pacificadmin@nielsen.com.

INTRODUCING APPLICATION MARKET INTELLIGENCE

"**83% of online Australians who have ever accessed the internet via a mobile phone have at some point downloaded a mobile app, still on an upward trend (78% in 2011)**"

APPLICATION MARKET INTELLIGENCE 'STARTER PACK' NOW AVAILABLE

A comprehensive document detailing:

- Purpose of tagging mobile/tablet apps
- Reportable App MI metrics

- Tag implementation guidelines

All app publishers should start preparing to tag their applications without delay!

Contact your Nielsen Account Manager for a copy of the starter pack or for further information.

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OF THE CONSUMER™

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