



nielsen

THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

SEPTEMBER 2013



STATE OF THE ONLINE LANDSCAPE

SEPTEMBER 2013

Welcome to the September 2013 edition of Nielsen's Online Landscape Review. This month we cover enhancements to web traffic reporting in the Nielsen Online Ratings interface. We also share some deeper insights on the sports category to see which sites online Australians are most engaged with and how this has changed over the past 12 months.

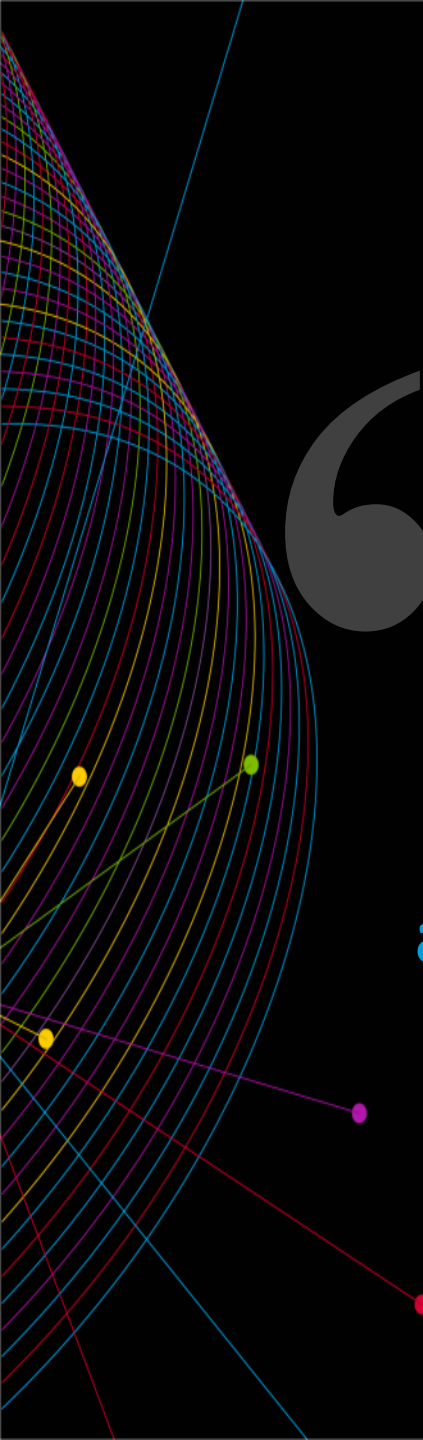
The month of September 2013 witnessed 16.4 million Australians actively online. Broken down, this equated to an average of 36 hours per person (a decrease of an hour on August 2013) across 59 browser sessions.

From Market Intelligence, we spotlight device access by day of week for the Real Estate/Apartments category. As usual, the latest figures around total mobile page impressions and access by different devices are also included.

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 series of concentric, overlapping lines in various colors (red, yellow, green, blue) that form a spherical shape. Several colored dots (yellow, green, purple, red) are placed on these lines, with thin lines extending from them towards the right, suggesting data points or connections.

OUR DATA: THE NIELSEN PERSPECTIVE



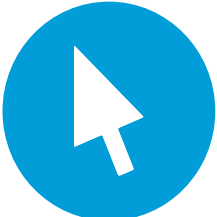
“ Total online advertising expenditure this year was \$3.6b, of which 53.8% was attributed to Search and Directories, 26.5% to General Display and the remaining 19.7% to Classifieds ”

AT A GLANCE: THE ONLINE LANDSCAPE

SEPTEMBER 2013



16.4 million Unique Australians.



29.7 million viewed pages.



35.9 million minutes spent.



36 hours spent, across **59** sessions.



788.7 million mobile page impressions made.



TOP 10 BRANDS BY UNIQUE AUDIENCE*

SEPTEMBER 2013

Brands	Unique Audience (000s)	Page Views (000s)	Average Time Spent (HH:MM:SS)
Google	14,001	3,298,712	02:53:41
Facebook	10,764	3,509,838	08:48:53
Mi9	10,269	1,257,428	02:12:26
YouTube	8,953	843,851	03:13:54
Microsoft	7,942	43,748	01:17:14
Yahoo!7	7,470	488,868	01:33:39
eBay	6,673	923,415	01:45:42
Wikipedia	6,667	150,290	00:32:56
Apple	6,312	45,586	00:46:39
ABC Online Network	4,313	125,854	00:48:11

*Including Applications that access the internet

Source: Nielsen Online Ratings – Hybrid, September 2013

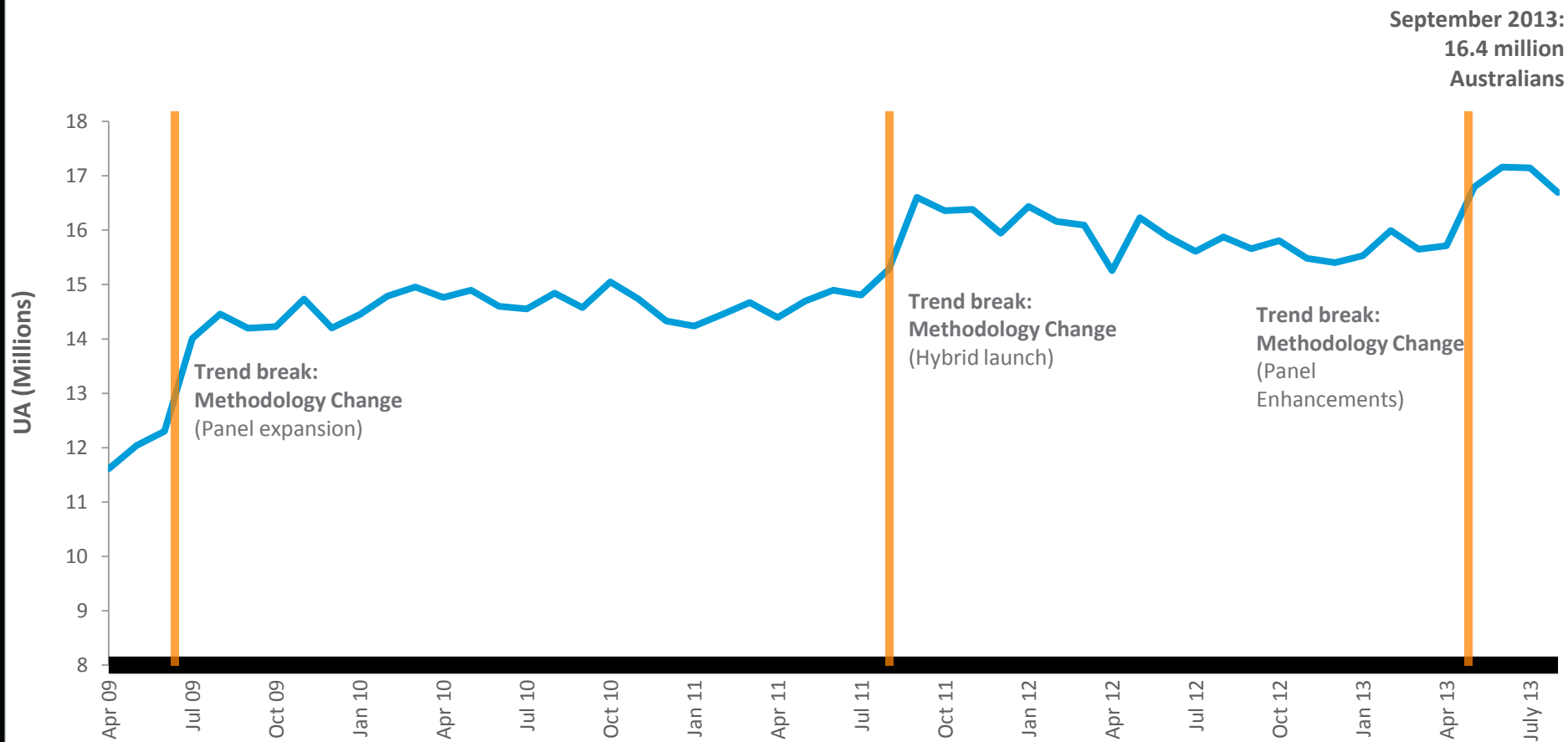
An abstract graphic on the left side of the slide. It features a sphere-like shape composed of many thin, overlapping lines in various colors (blue, green, yellow, red, purple). Several colored dots (yellow, green, purple, red) are placed on the surface of the sphere, with thin lines extending from them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

THE ONLINE UNIVERSE: SEPTEMBER 2013

NIELSEN ONLINE RATINGS: HYBRID

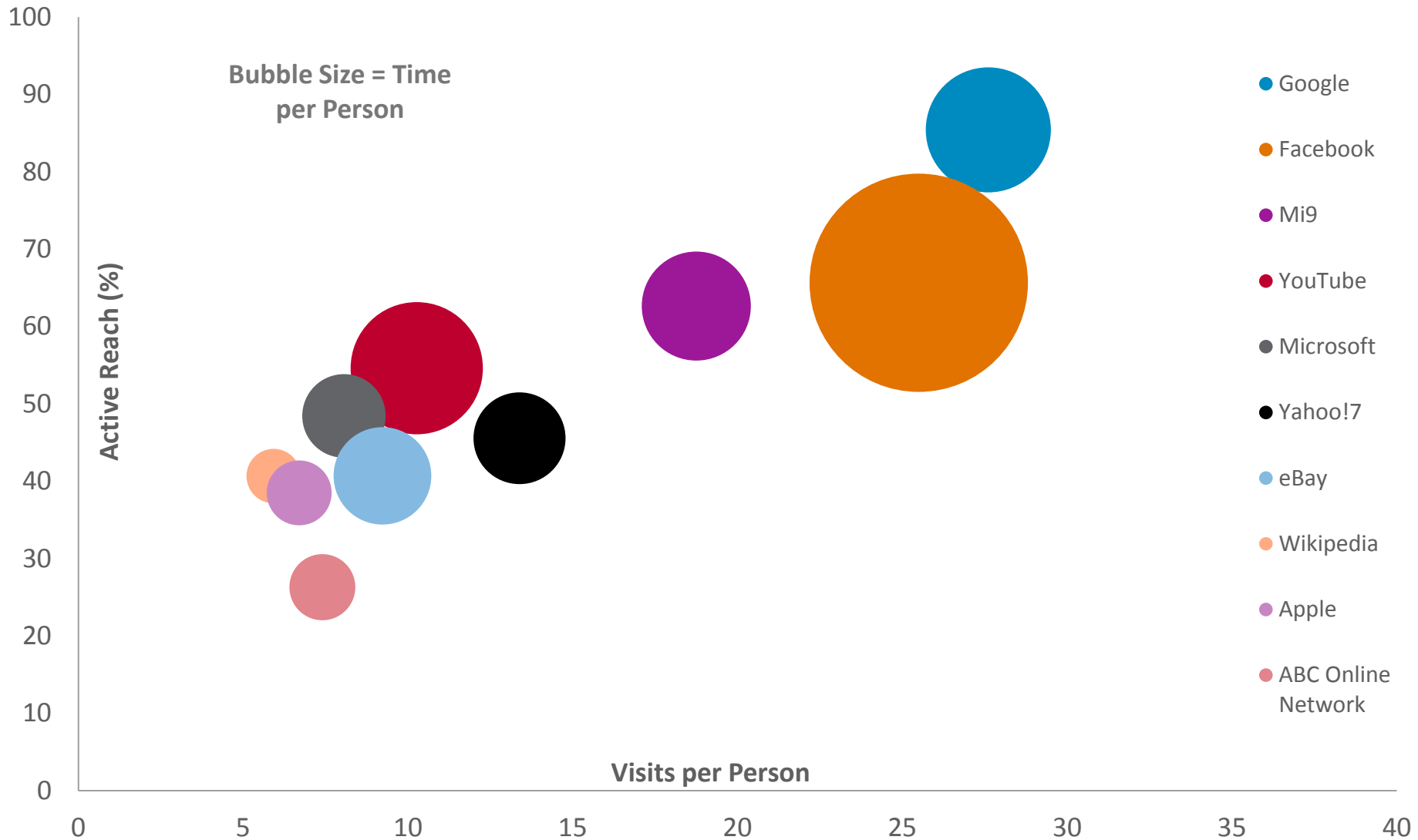
ONLINE AUDIENCE TREND

SEPTEMBER 2013



TOP 10 BRANDS BY STICKINESS

SEPTEMBER 2013



TOP 10 BRANDS AND THEIR STICKINESS

SEPTEMBER 2013

Rank	Brands	Active Reach %	Visits Per Person	Time Per Person
1	Google	85.42	27.60	02:53:41
2	Facebook	65.67	25.49	08:48:53
3	Mi9	62.65	18.74	02:12:26
4	YouTube	54.62	10.26	03:13:54
5	Microsoft	48.45	8.05	01:17:14
6	Yahoo!7	45.57	13.38	01:33:39
7	eBay	40.71	9.22	01:45:42
8	Wikipedia	40.67	5.92	00:32:56
9	Apple	38.51	6.70	00:46:39
10	ABC Online Network	26.31	7.40	00:48:11

AGE DEMOGRAPHICS ONLINE

SEPTEMBER 2013

2-17

Percentage of Online Aus

7.18%

Average Page Views

454

Avg Time Per Person*

11:16

18-24

Percentage of Online Aus

10.5%

Average Page Views

1,889

Avg Time Per Person*

43:20

25-34

Percentage of Online Aus

18.7%

Average Page Views

2,236

Avg Time Per Person*

42:45

35-49

Percentage of Online Aus

28.9%

Average Page Views

1,950

Avg Time Per Person*

39:15

50+

Percentage of Online Aus

34.7%

Average Page Views

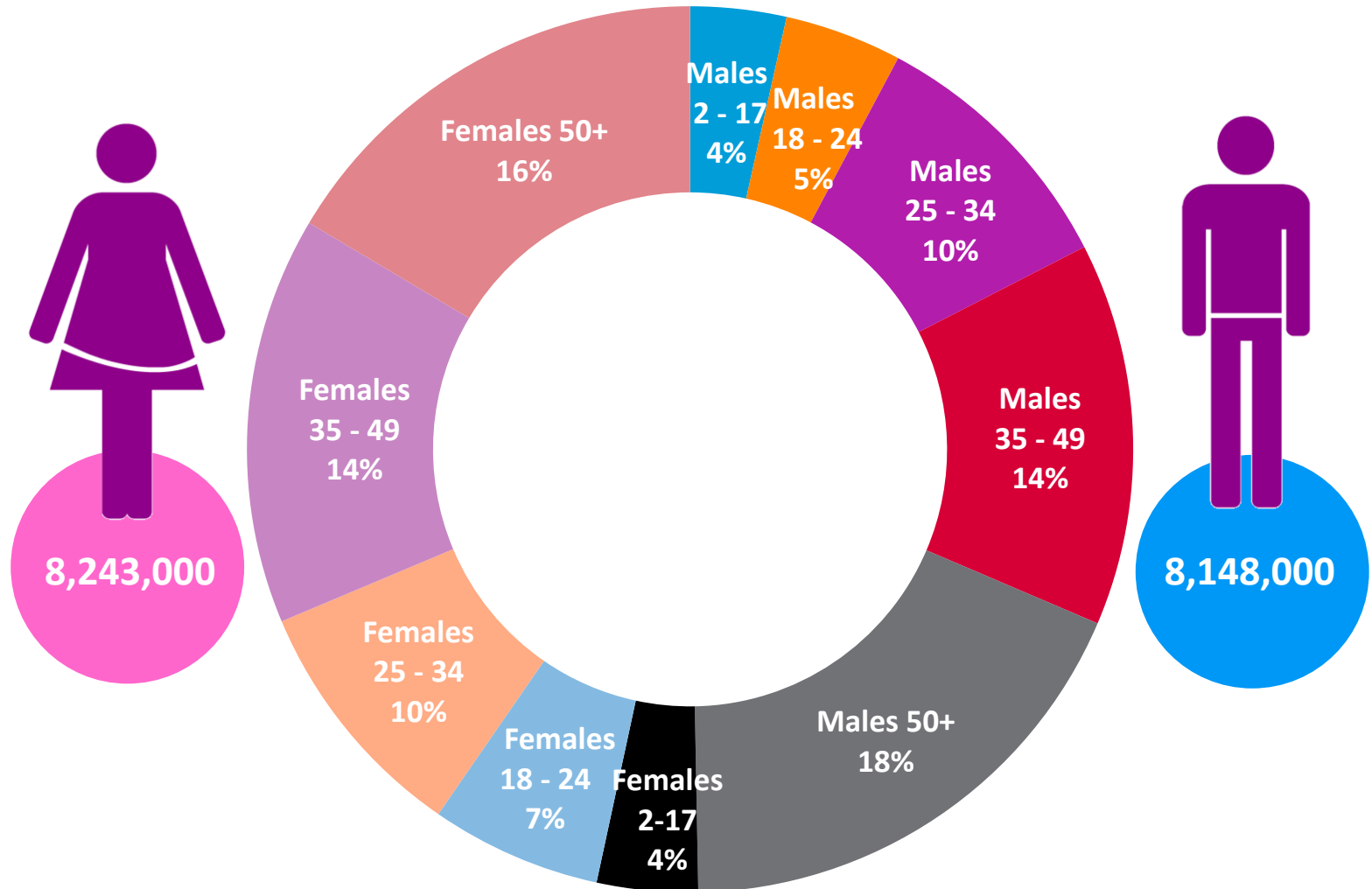
1,726

Avg Time Per Person*

33:59

GENDER BREAKDOWN

SEPTEMBER 2013



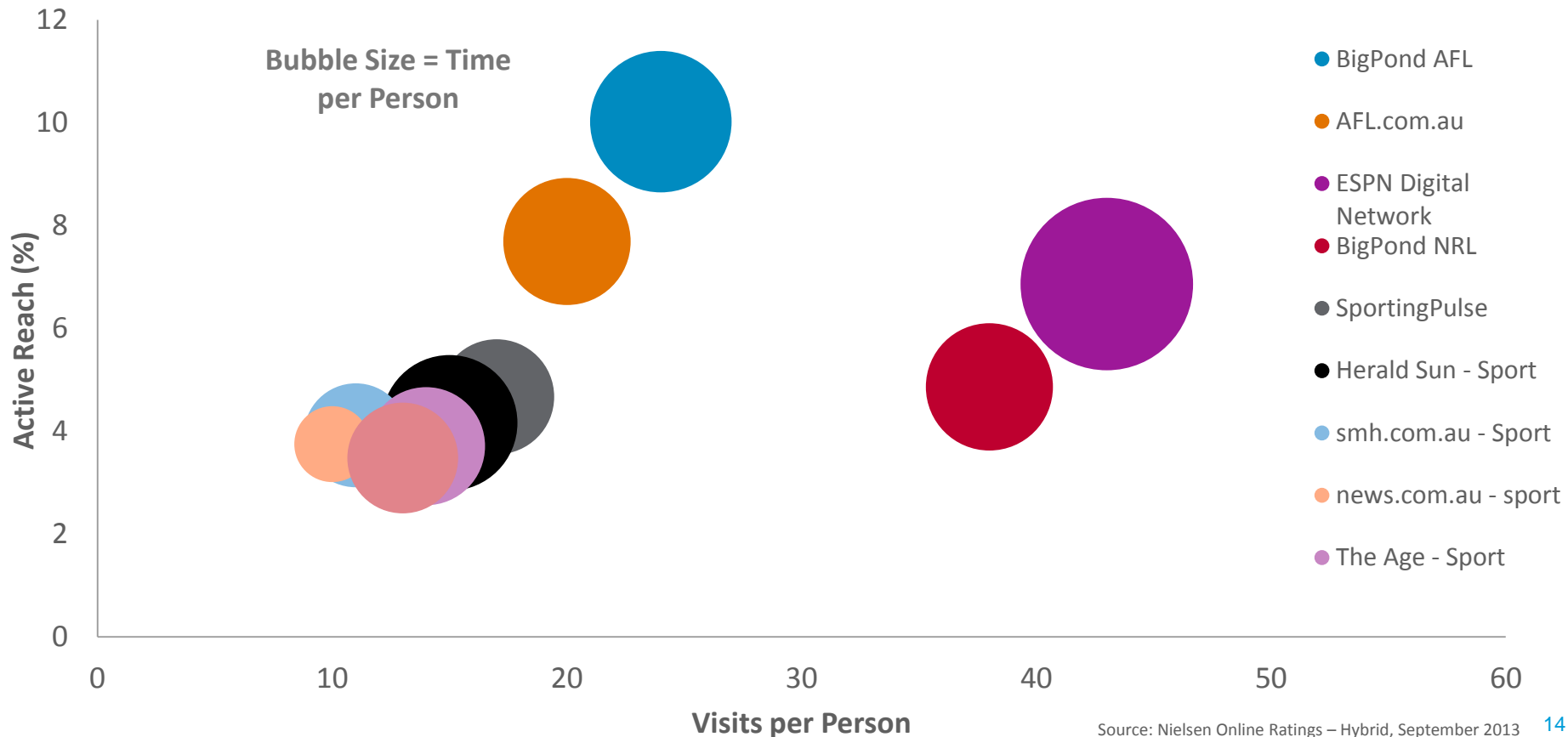
An abstract graphic on the left side of the slide. It features a sphere-like shape composed of many thin, curved lines in various colors (blue, green, yellow, red, purple). Several colored dots (yellow, green, purple, red) are placed on the sphere, with thin lines extending from them towards the center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

NIELSEN ONLINE RATINGS – HYBRID CATEGORY SPOTLIGHT: SPORT INFORMATION

TOP 10 SPORTS SITES BY STICKINESS

SEPTEMBER 2013

The below chart illustrates how audience stickiness across the top 10 sites of the Sports Category can be affected during grand final season. Although many of the sport sites in the category share similar stickiness, AFL and NRL sites in September experienced high levels of stickiness, largely attributable to grand final games taking place. Interestingly, there is quite a contrast between AFL and NRL audiences, with AFL experiencing high active reach, but a lower frequency of visitation and NRL experiencing a low active reach but relatively high visitation per person.



TOP 10 SPORTS SITES AND THEIR STICKINESS - MALE

SEPTEMBER 2013

Sites	Active Reach %	Visits Per Person	Time Per Person
BigPond AFL	10.02	24	00:36:19
AFL.com.au	7.69	20	00:29:23
ESPN Digital Network	6.86	43	00:54:06
SportingPulse	4.86	38	00:29:23
BigPond NRL	4.67	17	00:24:00
Herald Sun - Sport	4.16	15	00:33:30
smh.com.au - Sport	3.92	11	00:19:38
Yahoo!7 Sports Websites	3.75	10	00:10:27
news.com.au - sport	3.71	14	00:25:16
The Age - Sport	3.48	13	00:22:16

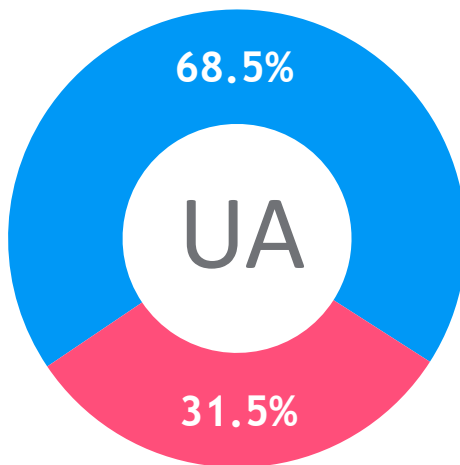
SPORT SITE SPOTLIGHT – ESPN DIGITAL NETWORK

SEPTEMBER 2013

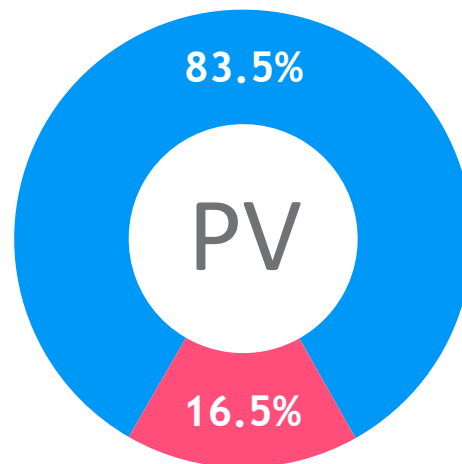
While 68.5% of the ESPN Digital Network Audience is male – they consume 83.5% of all the Page Views on the site.

It is important to understand that for a female to contribute to the audience split they only have to go to the site once in a month and consume one page. However, you may find males are the main consumers of content on the site.

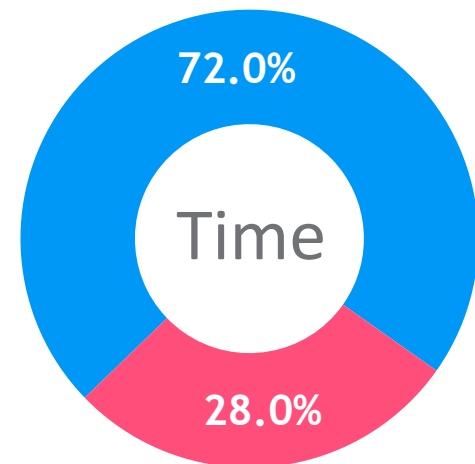
Always check both the demographic by Audience as well as by Page Views and Time spent for a complete picture.



■ Male ■ Female



■ Male ■ Female



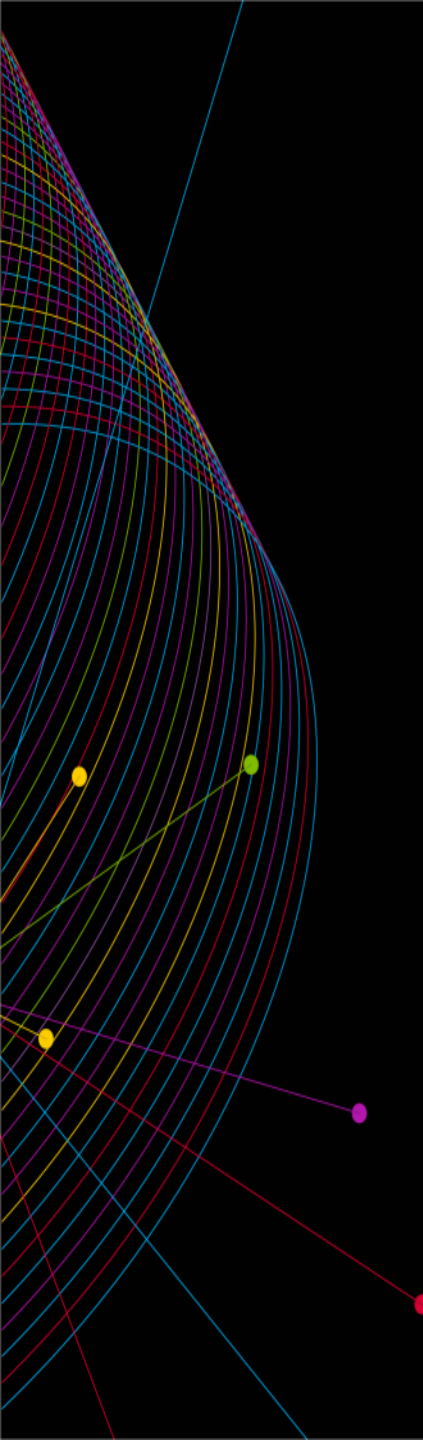
■ Male ■ Female

UA – Unique Audience | Time – Time Per Person | PV – Page Views

An abstract graphic on the left side of the slide, featuring a grid of colorful lines (red, green, blue, yellow) that form a curved, globe-like shape. Several colored dots (yellow, green, purple, red) are placed on the grid, with thin lines extending from them across the page.

THE ONLINE UNIVERSE: SEPTEMBER 2013

NIELSEN ONLINE RATINGS: HYBRID STREAMING



The most popular inventory sources for online video are direct from a publisher (77%); from an ad network (64%) and from an agency trading desk (56%)

HYBRID STREAMING KEY ONLINE STATISTICS

SEPTEMBER 2013

This month showed a drop in overall the Unique Audience figures, but an increase of 1million streams.



12.1 million Unique Australians.



1.4 billion streams.



3.9 billion minutes.



5 hours and 20 mins spent per person



HYBRID STREAMING: TOP 10 BRANDS BY UNIQUE AUDIENCE

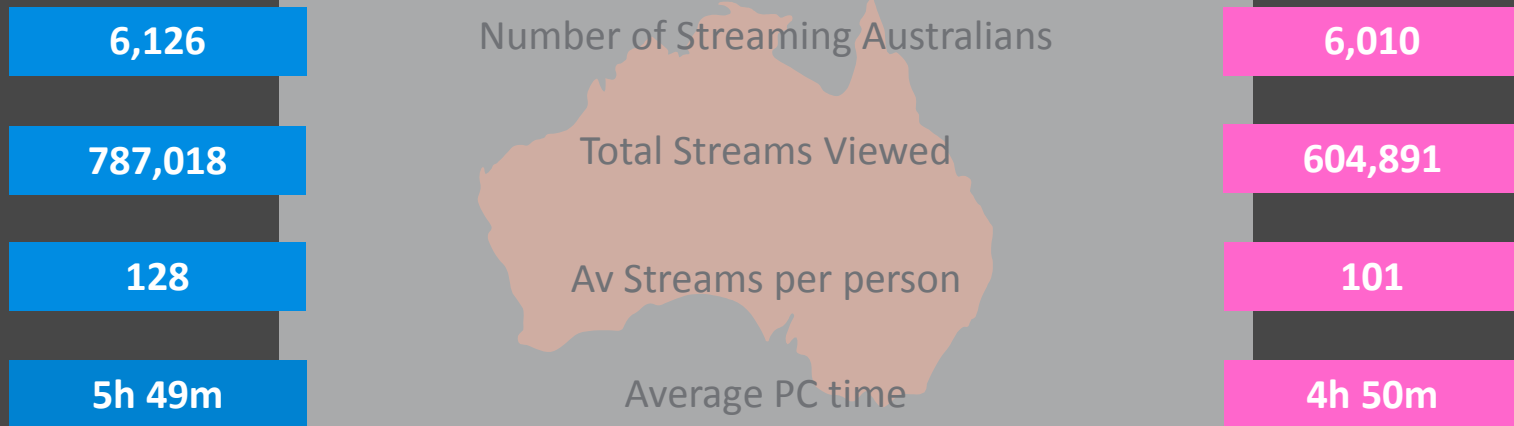
SEPTEMBER 2013

Brands	Unique Audience (000s)	Total Streams (000s)	Average Time Spent (HH:MM:SS)
YouTube	10,324	897,458	03:44:48
Facebook	3,619	63,725	00:25:45
Mi9	2,382	76,666	00:56:00
VEVO	2,381	54,451	00:47:33
The CollegeHumor Network	1,561	4,455	00:10:22
Yahoo!7	1,415	12,897	00:45:30
ABC Online Network	1,227	16,305	02:12:07
smh.com.au	1,126	4,198	00:08:53
news.com.au	1,044	4,998	00:10:14
Vube	767	2,948	00:14:50



HYBRID STREAMING: DEMOGRAPHIC BREAKDOWN

SEPTEMBER 2013



During the month of September, Men consumed 30.1% more streams and were engaged for almost an hour longer than Women with regard to video content online.

HYBRID STREAMING: AGE DEMOGRAPHICS

SEPTEMBER 2013

2-17

Percentage of Online Aus 5.9%

Average Streams 128

Average Time (HH:MM) 5:45

18-24

Percentage of Online Aus 10.3%

Average Streams 225

Average Time (HH:MM) 11:29

25-34

Percentage of Online Aus 19%

Average Streams 162

Average Time (HH:MM) 7:46

35-49

Percentage of Online Aus 29%

Average Streams 94

Average Time (HH:MM) 4:41

50+

Percentage of Online Aus 35.7%

Average Streams 73

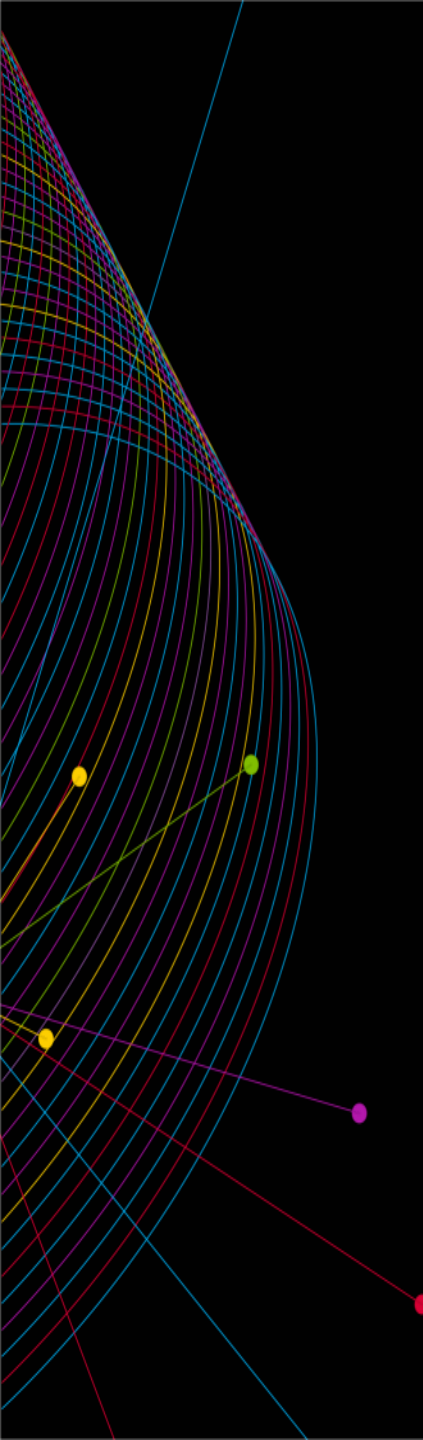
Average Time (HH:MM) 2:44



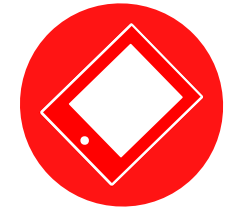
An abstract graphic on the left side of the slide. It features a curved, grid-like structure resembling a globe or a data visualization. The grid lines are in various colors (blue, green, yellow, red, purple). Several colored dots (yellow, green, purple, red) are placed at various points on the grid, with thin lines extending from them towards the right.

THE MOBILE UNIVERSE: SEPTEMBER 2013

NIELSEN MARKET INTELLIGENCE

A decorative graphic on the left side of the slide, featuring a sphere with a grid of lines in various colors (red, green, blue, yellow). Several colored dots (yellow, pink, red) are placed on the grid, with thin lines extending from them towards the center of the slide.

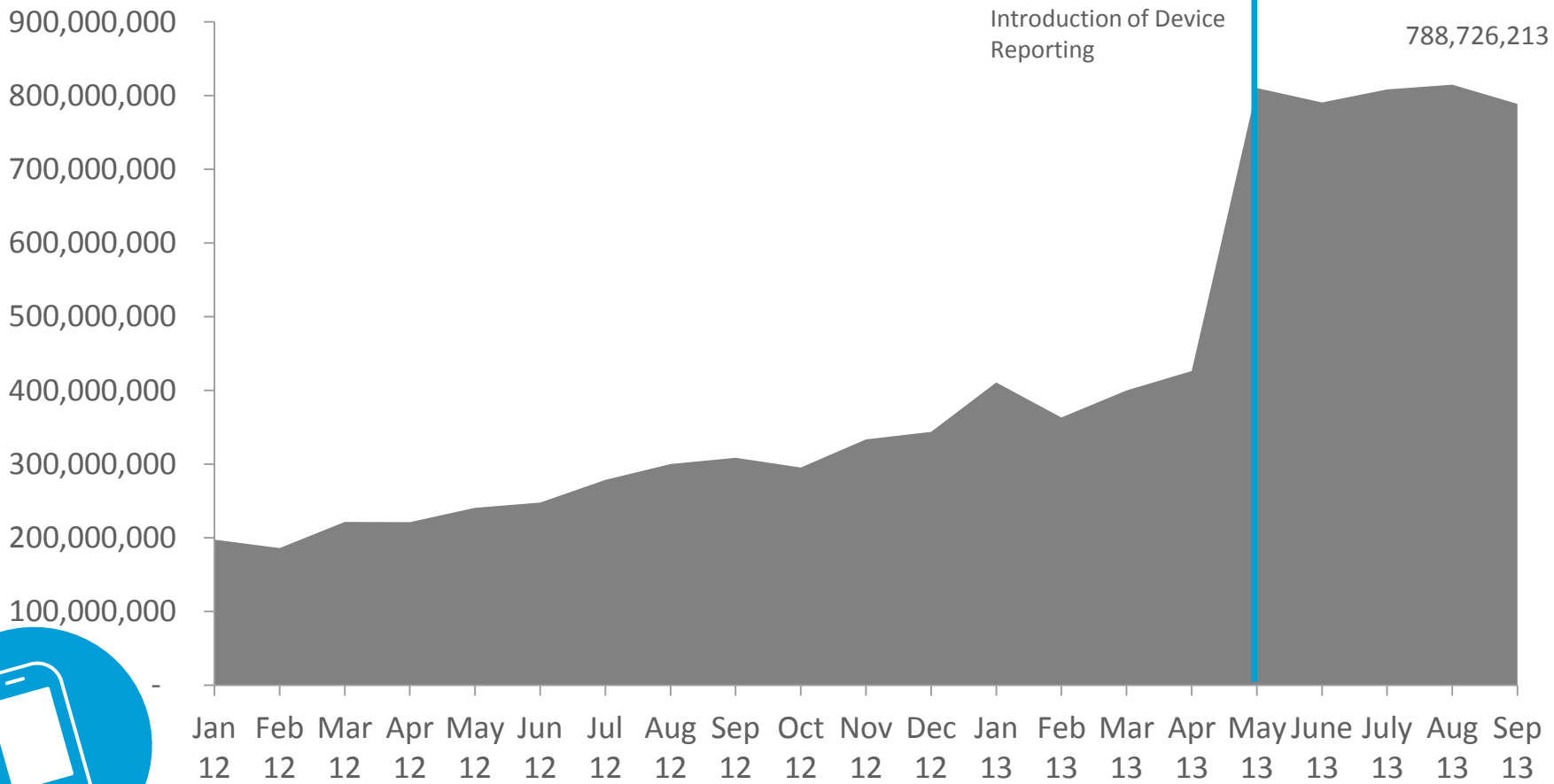
“Consumers who are watching mobile video in the majority of Asia-Pacific markets are doing so more than 10 times per week on average”



MOBILE PAGE IMPRESSIONS

SEPTEMBER 2013

Page Impressions

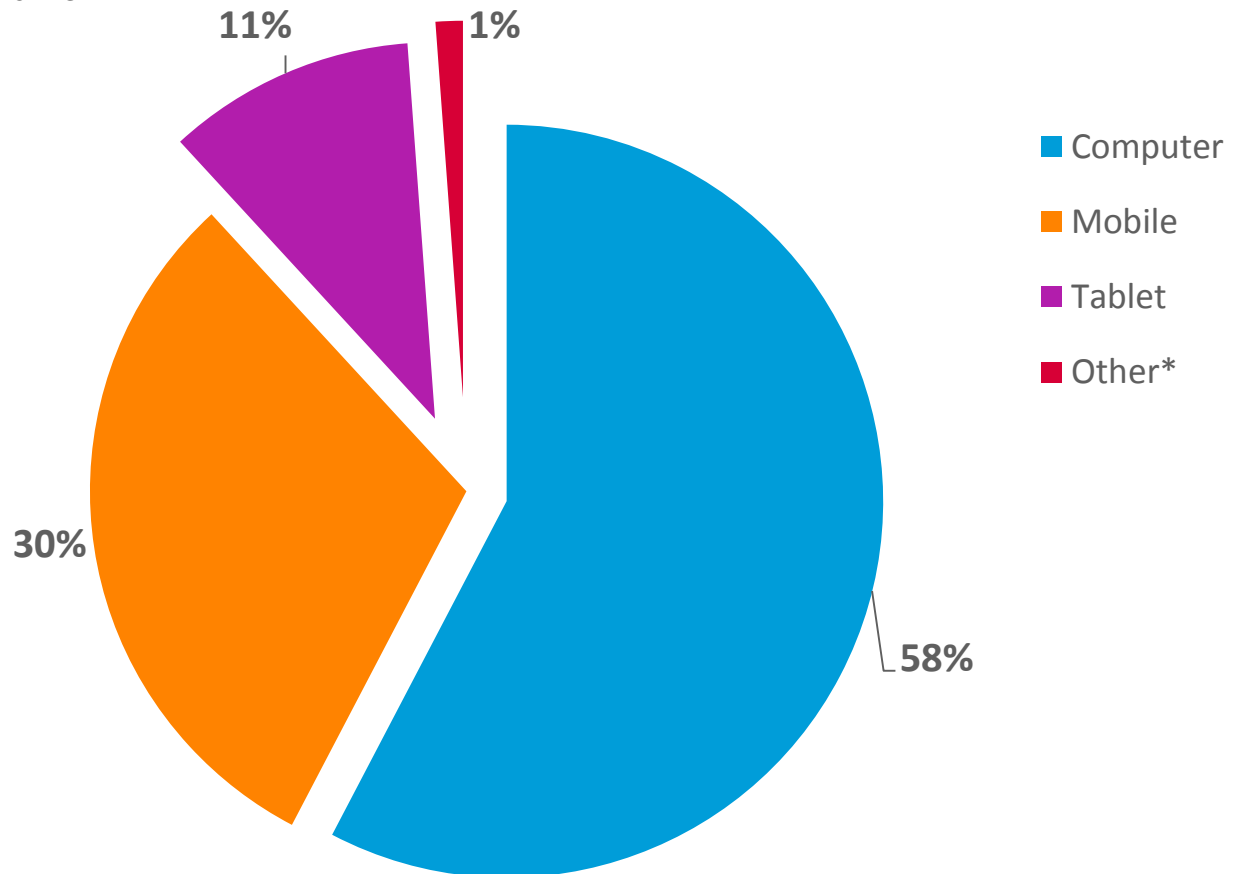


DEVICE TYPE COMPARISON

TOTAL AVERAGE DAILY UNIQUE BROWSERS

SEPTEMBER 2013

41% of Average Daily Unique Browsers came from a mobile or tablet device, a gain of 2% on last month. With the computer count down 2% on last month's average, it indicates a trend of Mobile and Tablet consuming Computer traffic.



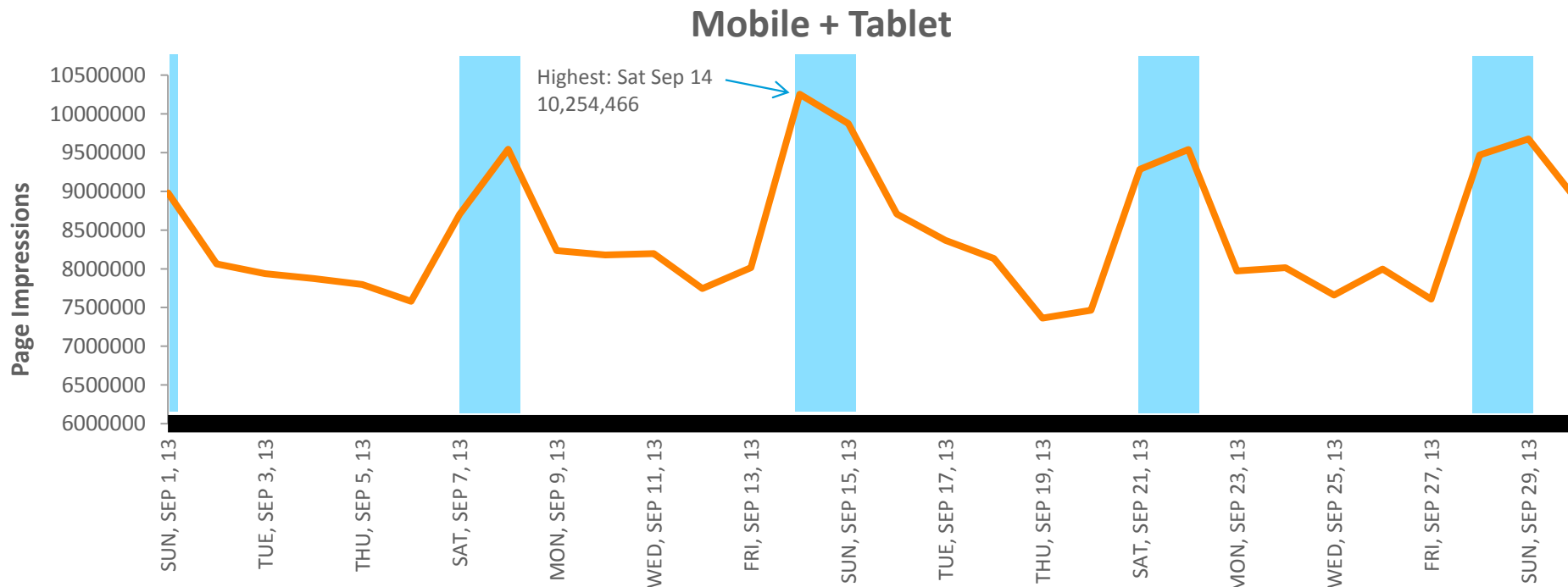
* Other is a sum of Console, Others and Unclassified devices

REAL ESTATE CATEGORY SPOTLIGHT

SEPTEMBER 2013

Looking at the Real Estate Category a Daily Page Impression analysis indicates certain peaks in fluctuations around weekend time periods (indicated in blue) over the month of September for Mobile and Tablet Page Impressions. Reinforcing the popularity of Mobiles and tablets as a source of entertainment and Information during leisure time.

On a whole, Mobile and Tablet traffic Page Impressions within the category sits at its highest point since the introduction of Device Reporting in Market Intelligence (May). This September figure tops the total average Page Impressions for the category by 9%.



An abstract graphic on the left side of the slide. It features a curved surface, possibly a sphere or a portion of one, covered in a grid of thin, multi-colored lines (red, green, blue, yellow). Several colored dots (yellow, green, purple, red) are scattered across the surface, with thin lines extending from them towards the right, suggesting data points or connections.

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

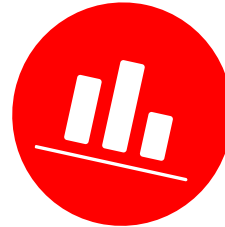


NIELSEN ONLINE RATINGS - WEB TRAFFIC REPORTING UPDATE

Web Traffic report for Custom Rollups is now available



Previously Web Traffic reporting in Nielsen Online Ratings was only available for Parents, Brands, Channels, Domains and Sub-Domains. Custom Rollups (referred to as “Custom Property” within the interface) can now also be selected.



This enhancement will allow Custom Rollups to be split down to a list of ranked URLs with Audience Traffic (%) data presented. This provides greater transparency into the composition of sites and audience within Custom Rollups.

NIELSEN ONLINE RATINGS – WEB TRAFFIC REPORTING

SEPTEMBER 2013

Web traffic reports are available under Quick Reports in the Report Navigator menu. They provide ranked Audience Traffic Percentages for a selected property/domain. The report shows what URLs contributing to a property/domain are receiving the greatest proportion of audience traffic . This report only works on one entity at a time.

The screenshot shows the Nielsen Online Report Builder interface. The interface is divided into several sections:

- Product Navigator:** Shows "Digital Content Measurement" selected.
- Report Navigator:** Shows "Quick Reports" selected under "Standard Reports".
- Saved Templates:** Shows "Default Folder" and "Deleted Specs" under "Folders".
- Report Name:** Shows "WebTraffic_NewReport".
- Report Layout:** Shows "WebTraffic" selected under "Report Layout".
- Selections:** Shows "Country: Australia", "Audience: Total", "Measurement Period: Sep 2013", and "Dataset: Surfing".
- Entities - WebTraffic:** Shows "Select from search: Search" and "Go" buttons, and a table with "Name" and "Level" columns.

Numbered callouts (1-5) highlight key features:

1. Report Builder tab
2. Quick Reports in Report Navigator
3. WebTraffic report type selected
4. Selections dropdowns (Country: Australia, Audience: Total, Measurement Period: Sep 2013, Dataset: Surfing)
5. Search field in the Entities section

NIELSEN ONLINE RATINGS – WEB TRAFFIC REPORTING

SEPTEMBER 2013

The output of a web traffic report is shown below. The Audience Traffic (%) is not an unduplicated figure (i.e. overlap in audience across multiple URLs is not accounted for) so will sum to greater than 100%.

Report Manager Report Builder Report Viewer User Preferences Help

WebTraffic_NewReport

Measurement Period: Sep 2013 Audience: Total Country: Australia Dataset: Surfing [Edit Specification](#)

Entities
Targets:

Items 1 to 86 of 86. Page 1 of 1 Go to Page: 1

Rank	Audience Traffic (%)	URL/Internet Applications
1	11.68	au.ibtimes.com
2	11.16	www.telegraph.co.uk/news
3	7.70	healthengine.com.au
4	7.11	www.womo.com.au
5	6.12	www.sydneyairport.com.au
6	5.89	fb1.farm2.zynga.com
7	5.53	wwf-fb.zyngawithfriends.com
8	5.32	www.ibtimes.com
9	4.62	www.independent.co.uk/news
10	4.35	www.telegraph.co.uk/culture

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[Edit Specification](#) [Export](#) [Save Layout](#)

NIELSEN ONLINE RATINGS – CUSTOM ROLLUP, STATE AND 3 MONTH AVERAGE REPORTS

SEPTEMBER 2013

Subscribers of Nielsen Online Ratings also have access to Custom Rollup, State and 3 Month Average Usage custom reports. The reports are available from the “My Content” tab under AUST Custom Reports at the Nielsen Answers homepage screen and are in a downloadable Excel format. The Nielsen Online Ratings Custom Rollup list is a brand new report which gives a complete breakdown of custom rollups.

These reports are released on the 25th of the month as for the Custom Rollups list, which is available on the 15th. Currently August 2013 reports are available.

1 My Content Nielsen Online

2

Report Title	Date	Time
Nielsen Online Ratings Custom Rollups List - September 2013	14/10/13	21:30
Nielsen Online Landscape Review August 2013	01/10/13	01:25
3-Month-Average for August 2013 Hybrid data	30/09/13	17:23
State and Region for August 2013 Hybrid data	30/09/13	17:21

Download View All

My Tools

- Digital Content Measurement
- NetView
- Nielsen Campaign Ratings
- Operational Dashboard

SIGN UP FOR INTERNAL PORTAL NOTIFICATIONS

nielsennow connections

NIELSEN ONLINE RATINGS – STATE + 3 MONTH REPORTS

State and Region Report
Hybrid Data
Aug-13

Unique Audience Map	Parent by region	Channel by region
Unique Audience by region	Application by region	Custom rollup by region
Category by region	Brand by region	

The State and Region report is an interactive Excel workbook (left) that provides data on relative audience across states/regions (i.e. metro or non-metro). As this is more granular analysis, sample limitations do exist outside the major states.

The 3 Month Average report (below) is an Excel spreadsheet that contains an averaged 3 month trend for Parents, Brands, Channels, Web Apps and Categories. This report is particularly useful for sites that experience significant seasonality or fluctuation month-on-month as it smooths out variability in non-core audiences.

3 month average Unique Audience report

APPS	Inc. Apps	↓↑
LOCATION	Total	↓↑
GRP	Channel	↓↑

*Trend Break

Average of AUDIENCE	Column Labels	↓↑	1-Jun-13	1-Jul-13	1-Aug-13	3 Month Average
Row Labels		↓↑				



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LET US HELP YOU 24/7 - POWERFUL INSIGHTS NOW ONLINE

We are proud of both the depth and breadth of work that our clients ask us to undertake. As we focus on supporting our clients' businesses, we frequently develop keynote reports. Some focus on global landscapes, some on local issue – all aim to help you get a clearer picture of your consumers and your opportunities for growth. All of these report are now available to you and your team 24/7.

Follow the link below and you'll access over 20 reports we have released in the last year. We've organised them so you can download our free reports straight away. Our benchmark syndicated reports are also available for purchase with an easy, secure facility to pay and download on the spot.

[Click here now!](#)

We hope this fresh initiative adds value to your business. If you have any queries please don't hesitate to contact your Nielsen Account Manager or email pacificadmin@nielsen.com.



An abstract graphic on the left side of the page. It features a series of curved, overlapping lines in various colors (blue, green, yellow, red, purple) that form a partial globe or sphere. Several small, colored dots (yellow, green, purple, red) are placed on these lines, with thin lines extending from them across the page, suggesting data points or connections.

NIELSEN'S 2014 AUSTRALIAN CONNECTED CONSUMERS REPORT

KEEP PACE WITH YOUR CONSUMERS' DIGITAL HABITS

NIELSEN'S 2014 AUSTRALIAN CONNECTED CONSUMERS REPORT

Technology, online conversations and new devices have all interrupted our old ways of finding consumers. More than ever we need a clear view of what is happening today and the implications for the coming years. That's where **Nielsen's Australian Connected Consumers Report** comes in.

Now in its 16th year we've been capturing and interpreting these trends for clients unlike anyone else. Companies large and small rely on us to help them understand the new digital landscape and help them finesse their strategies for today's connected consumer.

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Order before 20 December and you'll enjoy our special early-bird price – saving \$2000. Keen to get your own customised input to the research design? Order your report before November 1st 2013 and get involved in the design of unique questions before we go to field.

For more information on the report and how you can take advantage of the early bird pricing, contact your Nielsen representative or email gabrielle.edmonds@nielsen.com





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OF THE CONSUMER™

CONTACT

careau@nielsen.com

www.nielsen.com/au/

(02) 8873 7000