



nielsen

THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

FEBRUARY 2014



STATE OF THE ONLINE LANDSCAPE

February 2014

Welcome to the February 2014 edition of Nielsen's Online Landscape Review.

Time online consuming video content via desktops increased by 13 minutes per active user during the month, with increases in total time online surfing non-video web content as well.

Mobile page impressions dropped from January's record-high mobile traffic, and remained higher than any period since the current form of measurement began in May 2013.

This month we also take a closer look at the sports category, to understand key players and online engagement in this space.

During March, Nielsen have also published the 16th annual edition of what is now called the Australian Connected Consumers Report. The Report is a leading resource in understanding how consumers engage across various media platforms, and this year includes a deep-dive into the online retail habits of the Australian consumer.

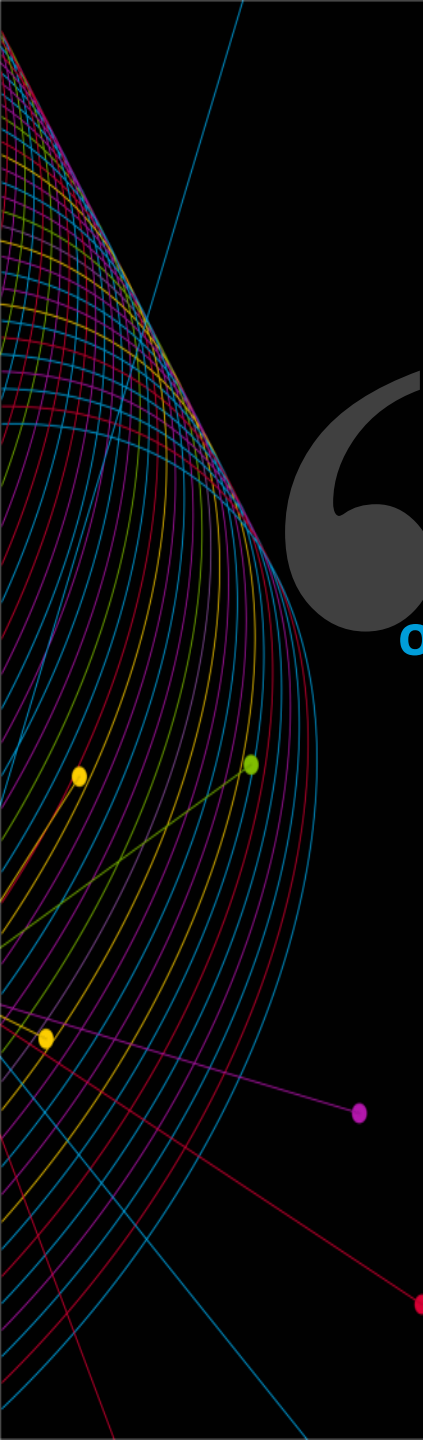
If you'd like to know more about any of the insights presented within this report, contact your Nielsen Account Manager directly or email careau@nielsen.com.



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 (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 parts of the sphere.

HIGHLIGHTS: FEBRUARY 2014

NIELSEN ONLINE RATINGS: HYBRID



Smartphones are now in the hands of seven in 10 online Australians (69%) and tablets in half of homes (47%). A range of new connected devices are emerging such as connected TVs and games consoles; but they remain niche at present.

AT A GLANCE: THE ONLINE LANDSCAPE

February 2014



27.9 billion viewed pages.



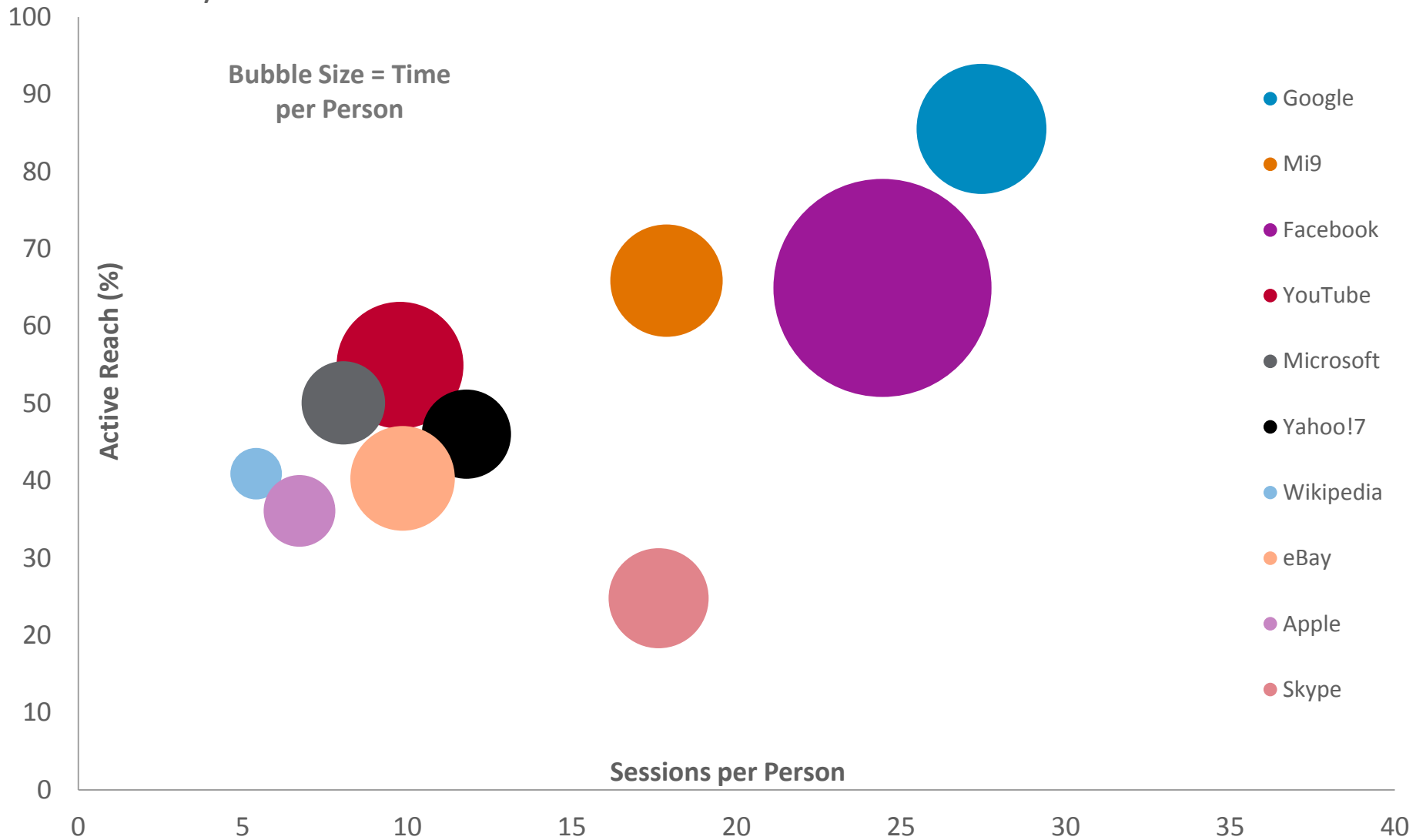
34.7 billion minutes spent.



37 hours spent online, across **60** sessions.

TOP 10 BRANDS AND THEIR ENGAGEMENT

February 2014



TOP 10 BRANDS AND THEIR ENGAGEMENT

February 2014

| UA Rank | Brands | Unique Audience (000's) | Page Views (000s) | Active Reach % | Sessions Per Person | Time Per Person |
|---------|-----------|-------------------------|-------------------|----------------|---------------------|-----------------|
| 1 | Google | 13,290 | 3,271,524 | 85.54 | 27.44 | 02:52:08 |
| 2 | Mi9 | 10,241 | 1,239,042 | 65.91 | 17.87 | 02:08:10 |
| 3 | Facebook | 10,093 | 2,859,451 | 64.96 | 24.43 | 08:03:36 |
| 4 | YouTube | 8,537 | 576,986 | 54.95 | 9.77 | 02:43:53 |
| 5 | Microsoft | 7,781 | 46,060 | 50.08 | 8.05 | 01:10:41 |
| 6 | Yahoo!7 | 7,153 | 349,479 | 46.04 | 11.79 | 01:21:10 |
| 7 | Wikipedia | 6,357 | 125,389 | 40.92 | 5.40 | 00:26:50 |
| 8 | eBay | 6,265 | 831,402 | 40.33 | 9.85 | 01:51:24 |
| 9 | Apple | 5,612 | 32,195 | 36.12 | 6.72 | 00:52:11 |
| 10 | Skype | 3,855 | 18,657 | 24.81 | 17.63 | 01:41:44 |

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, February 2014

AGE DEMOGRAPHICS ONLINE

February 2014

2-17

Percentage of Online Aus

6.9%

Average Page Views

373

Av. Time Per Person*

10:02

18-24

Percentage of Online Aus

10.5%

Average Page Views

1,703

Av. Time Per Person*

41:18

25-34

Percentage of Online Aus

19.9%

Average Page Views

2,281

Av. Time Per Person*

44:37

35-49

Percentage of Online Aus

28.5%

Average Page Views

1,972

Av. Time Per Person*

42:38

50+

Percentage of Online Aus

34.2%

Average Page Views

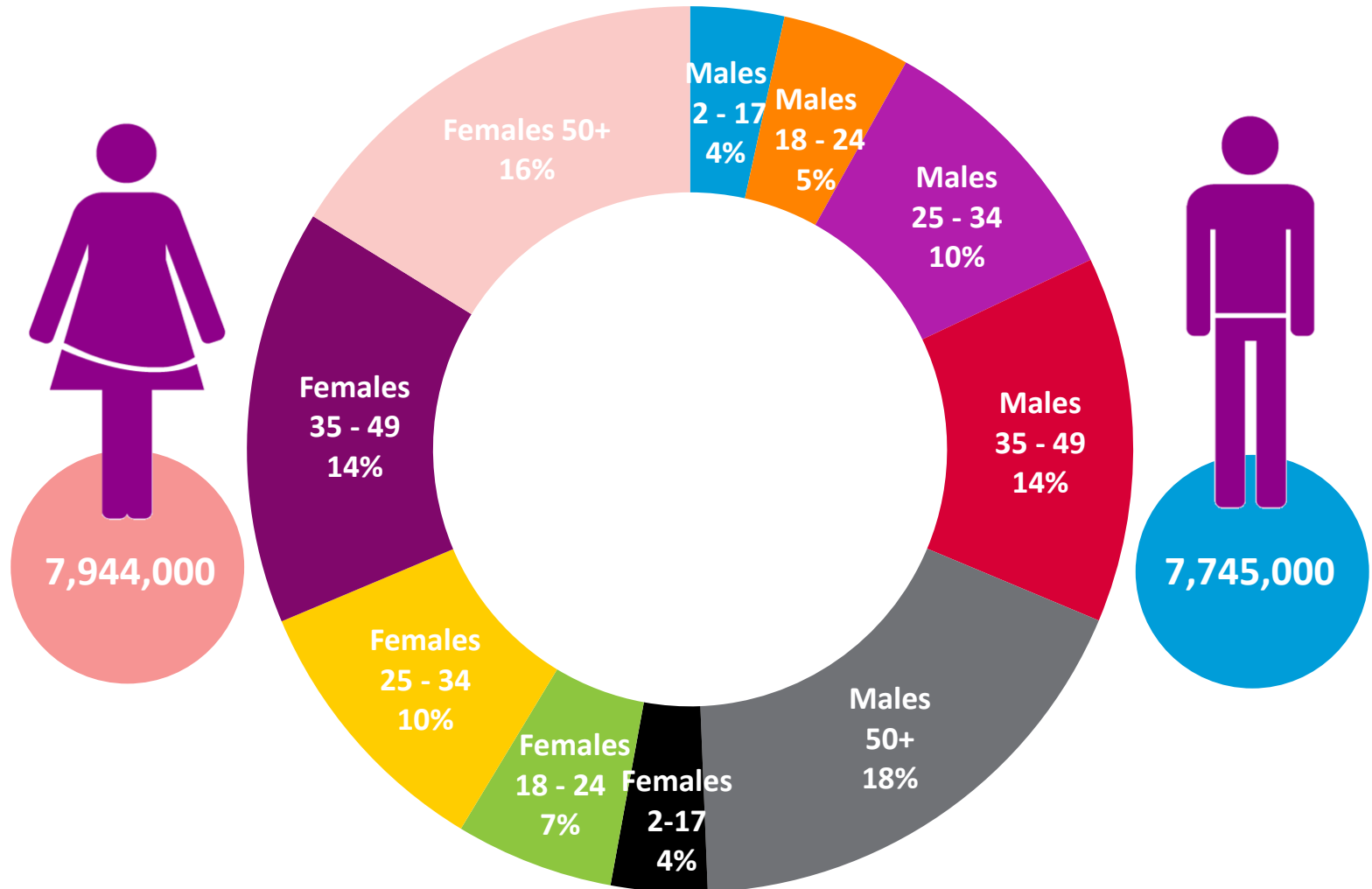
1,844

Av. Time Per Person*

38:26

GENDER BREAKDOWN

February 2014



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

NIELSEN ONLINE RATINGS – HYBRID ENTERTAINMENT - SPORTS

TOP 10 SPORT SITES AND THEIR STICKINESS - MALE

February 2014

ESPN Digital Network and ESPNcricinfo lead the top 10 in terms of time per person. Both have consumers who stay on their sites for substantial periods of time i.e. **1 hour and 39 minutes**. Noticeably, Herald Sun – sport has the greatest time per person metric compared to the other news subcategories – news.com.au – sport and smh.com.au –sport. Also, with the Winter Olympics occurring during February, Tenplay.com.au (see page 24) noticeably recorded a 28% increase in audience and a 300% gain in time per person on site.

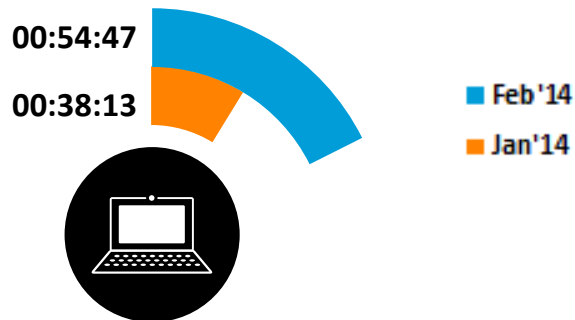
| UA Rank | Sites | Active Reach (%) | Sessions Per Person | Time Per Person |
|---------|--------------------------------|------------------|---------------------|-----------------|
| 1 | ESPN Digital Network | 8.92 | 12.72 | 01:39:01 |
| 2 | Telstra Media AFL | 8.08 | 9.23 | 00:38:20 |
| 3 | News.com.au – sport | 6.70 | 8.86 | 00:29:09 |
| 4 | Smh.com.au – sport | 5.83 | 8.26 | 00:23:10 |
| 5 | FOX SPORTS | 5.25 | 8.11 | 00:32:19 |
| 6 | Cricket Australia | 4.64 | 6.70 | 00:46:11 |
| 7 | ESPNcricinfo | 4.29 | 14.27 | 01:38:57 |
| 8 | SportingPulse | 4.03 | 3.43 | 00:13:03 |
| 9 | FOXSports.com on MSN (Network) | 4.01 | 2.45 | 00:09:22 |
| 10 | Herald Sun- Sport | 3.93 | 6.04 | 00:53:35 |

* Please note that Wide World of Sports is included in its own 'custom rollup', and achieved an active reach of 6.89%, with 7.5 sessions per person over 23 minutes per person.

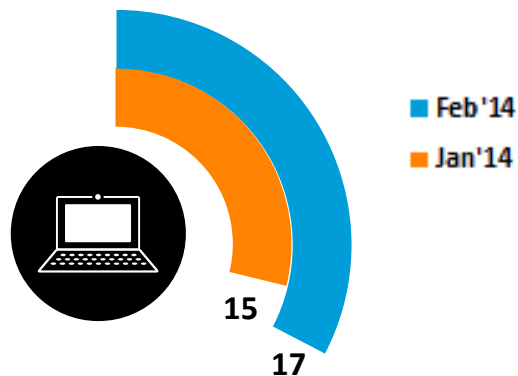
ENTERTAINMENT - SPORTS

Streaming for the month of February had a noticeable uplift in time per person (**43%**) and a **13%** increase in streams per person. Surfing saw an increase of **5%** for sessions per person and a minor decrease in time per person, this inverse relationship could be a result from consumers who frequently access their unique browser of choice to check their team's scores or results.

STREAMING

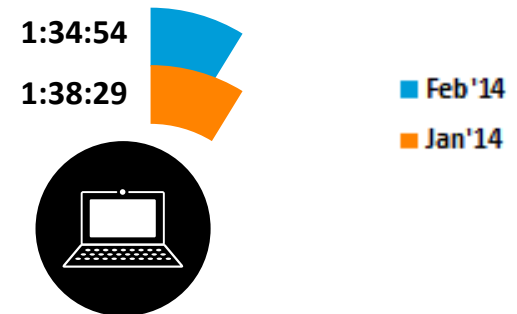


Metric: Time Per Person (hh:mm:ss)

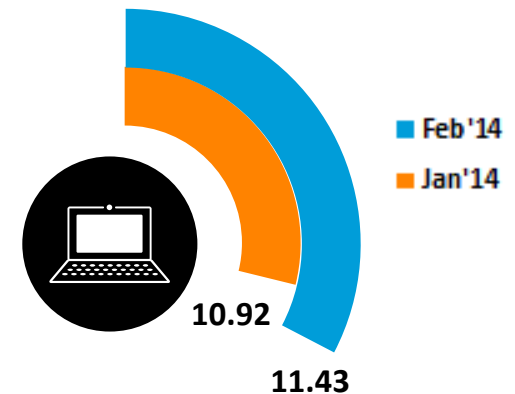


Metric: Streams Per Person

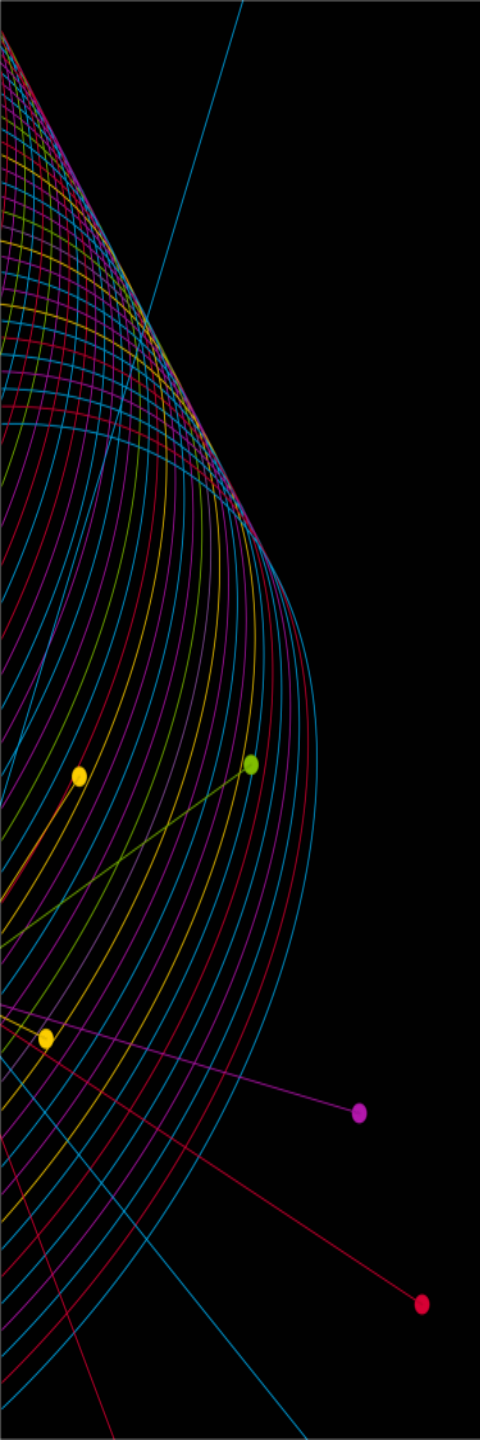
SURFING



Metric: Time Per Person (hh:mm:ss)



Metric: Sessions Per Person

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HIGHLIGHTS: FEBRUARY 2014

NIELSEN ONLINE RATINGS: HYBRID STREAMING

A large, light gray opening quotation mark on the left side of the slide.

Internet-sourced TV content has grown in adoption; one in two online Australians now watch internet TV.

A large, light gray closing quotation mark on the right side of the slide.

HYBRID STREAMING KEY ONLINE STATISTICS

February 2014



1.7 billion streams.



5.4 billion minutes.



7 hours and 42 mins spent per active user.

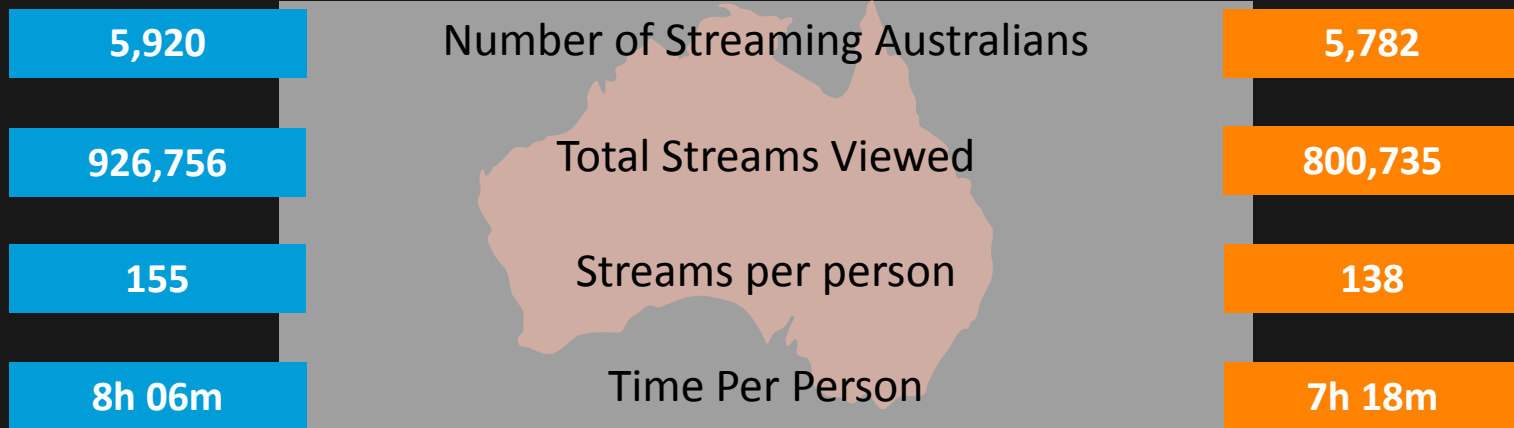
HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

February 2014

| UA Rank | Brands | Unique Audience (000s) | Total Streams (000s) | Average Time Spent (HH:MM:SS) |
|---------|--------------------------|------------------------|----------------------|-------------------------------|
| 1 | YouTube | 9,838 | 1,105,254 | 05:43:03 |
| 2 | Facebook | 4,292 | 82,614 | 00:42:54 |
| 3 | VEVO | 2,165 | 65,727 | 01:20:10 |
| 4 | Mi9 | 2,157 | 67,365 | 00:53:06 |
| 5 | The CollegeHumor Network | 2,000 | 7,067 | 00:15:05 |
| 6 | news.com.au | 1,605 | 15,062 | 00:09:57 |
| 7 | Yahoo!7 | 1,455 | 8,118 | 00:28:22 |
| 8 | smh.com.au | 976 | 3,873 | 00:04:54 |
| 9 | ABC Online Network | 972 | 7,447 | 02:19:42 |
| 10 | Dailymotion | 633 | 25,409 | 01:29:11 |

HYBRID STREAMING: DEMOGRAPHIC BREAKDOWN

February 2014



February saw increases in total streams viewed by both males and females as compared to January; males increased by **3%** and females by **5%**. Also, males had a noteworthy lift in time per person by **28 minutes** versus January.

HYBRID STREAMING: AGE DEMOGRAPHICS

February 2014

2-17

Percentage of Online Aus 5.4%

Average Streams 124

Average Time (HH:MM) 6:21

18-24

Percentage of Online Aus 10.4%

Average Streams 252

Average Time (HH:MM) 17:06

25-34

Percentage of Online Aus 20.2%

Average Streams 175

Average Time (HH:MM) 10:26

35-49

Percentage of Online Aus 28.3%

Average Streams 148

Average Time (HH:MM) 7:04

50+

Percentage of Online Aus 35.8%

Average Streams 103

Average Time (HH:MM) 4:10

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 connected to the grid by thin lines, suggesting data points or connections.

MOBILE UPDATE: FEBRUARY 2014

NIELSEN MARKET INTELLIGENCE

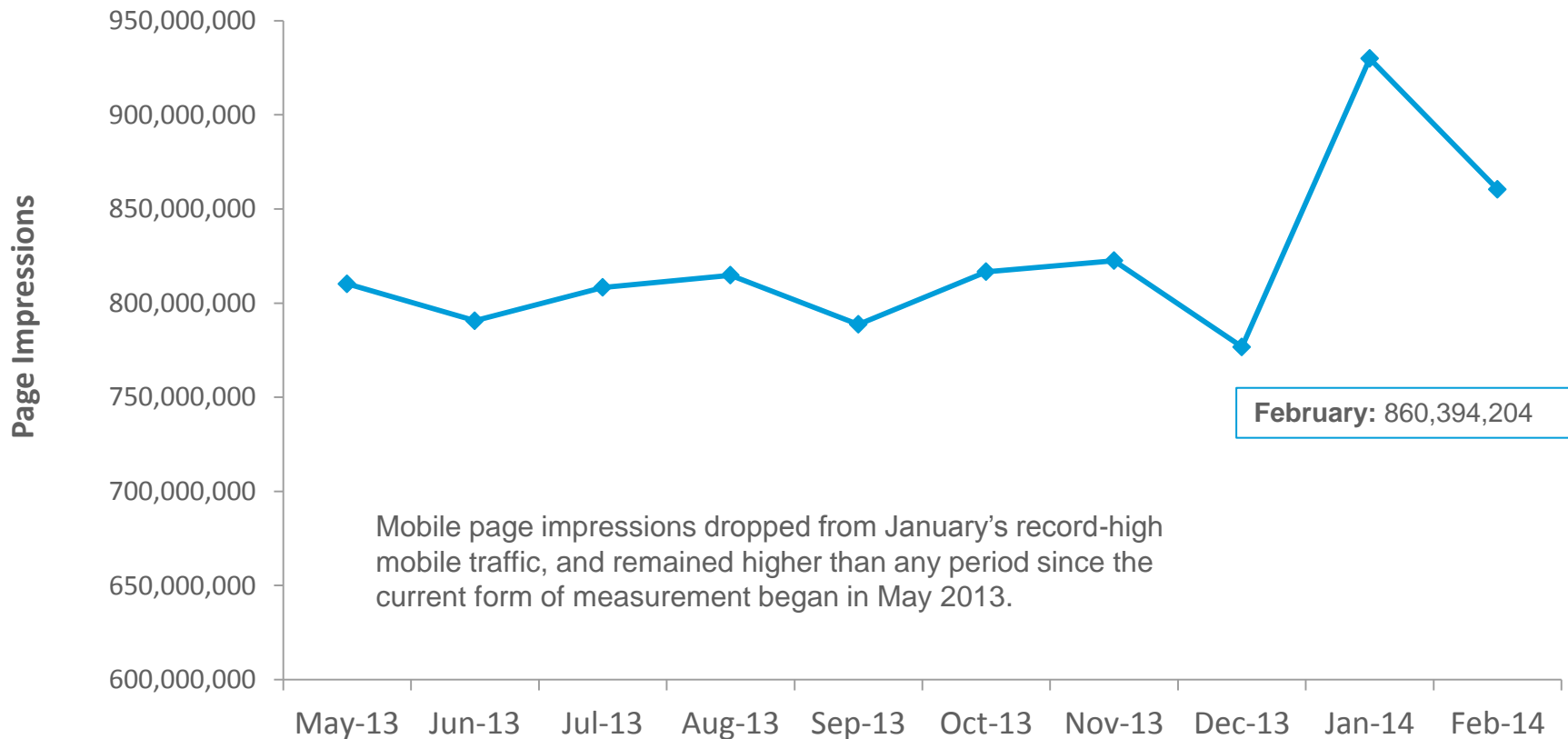


“Internet-delivered news content has already been adopted by close to 9 in 10 consumers, and access is shifting to more convenient devices.”



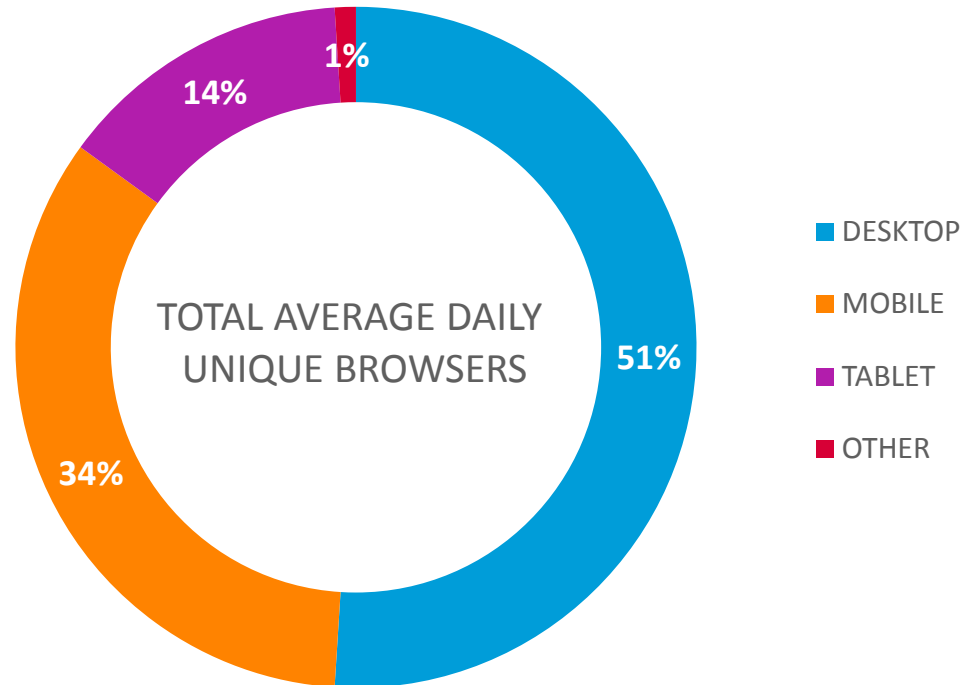
MOBILE PAGE IMPRESSIONS

February 2014



DEVICE TYPE COMPARISON

February 2014 – Market Domain – Domestic Traffic



Desktop has slightly increased in average daily unique browser usage (**1%**) while the other categories have remained steady.

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 parts of the sphere.

NIELSEN ONLINE RATINGS – HYBRID / MI ENTERTAINMENT – BROADCAST MEDIA

TOP 10 BROADCAST MEDIA SITES BY UNIQUE AUDIENCE

Broad Media sites for the month of February have seen a positive increase in traffic or unique audiences. More than half of the top 10 sites saw a significant uplift in traffic. Yahoo!7 TV has the highest traffic to its site of the commercial TV players with a **35%** change as compared to last month. Noticeably, SBS, ABC TV Websites, Ninemsn's Jump-In and Ten Play had robust growth – **16%**, **18%**, **61%** and **28%** respectively. ABC Online Network leads the top 10 in unique audience and time per person; nearly more than double the time spent online compared to the other sites. A total of 6.05 million people visited the broadcast media category during the period.

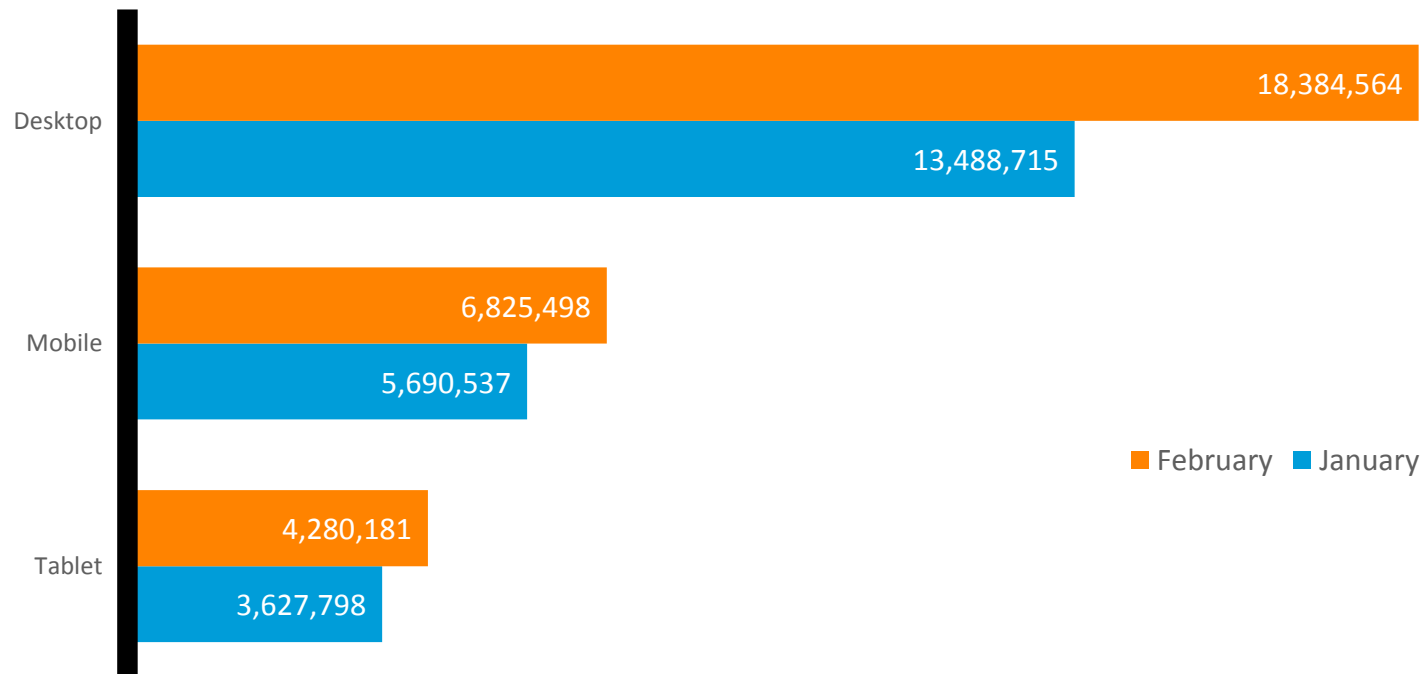
| Sites | Unique Audience (000) | | Variance Change | Time Per Person | |
|------------------------------------|-----------------------|----------|-----------------|-----------------|----------|
| | January | February | % | January | February |
| ABC Online Network | 3,212 | 3,335 | 4% | 00:54:47 | 00:53:23 |
| Yahoo!7 TV | 1,263 | 1,710 | 35% | 00:19:06 | 00:32:19 |
| SBS (Special Broadcasting Service) | 907 | 1,052 | 16% | 00:23:47 | 00:18:36 |
| ABC TV Websites | 887 | 1,048 | 18% | 00:20:49 | 00:26:57 |
| ABC Radio Websites | 1087 | 989 | -9% | 00:29:06 | 00:15:60 |
| ninemsn Jump-in | 577 | 928 | 61% | 00:15:03 | 00:26:58 |
| TenPlay | 618 | 791 | 28% | 00:08:06 | 00:24:30 |
| CBS Entertainment Websites | 656 | 607 | -7% | 00:06:34 | 00:08:10 |
| FOXTEL | 697 | 600 | -14% | 00:20:00 | 00:17:33 |
| BBC Worldwide | 631 | 569 | -10% | 00:12:46 | 00:05:33 |

BROADCAST MEDIA BY DEVICE

February 2014 – Dataset: Surfing – Category Sites

During the January to February period, all three devices saw an increase in total sessions. More consumers are using the web to access free to air TV websites. This increase in total sessions in all three device categories can be seen as increased engagement within the broadcast media category and their sites.

Desktop, Mobile and Tablet growth was – **36%**, **20%** and **18%**.



Metrics: Total Sessions



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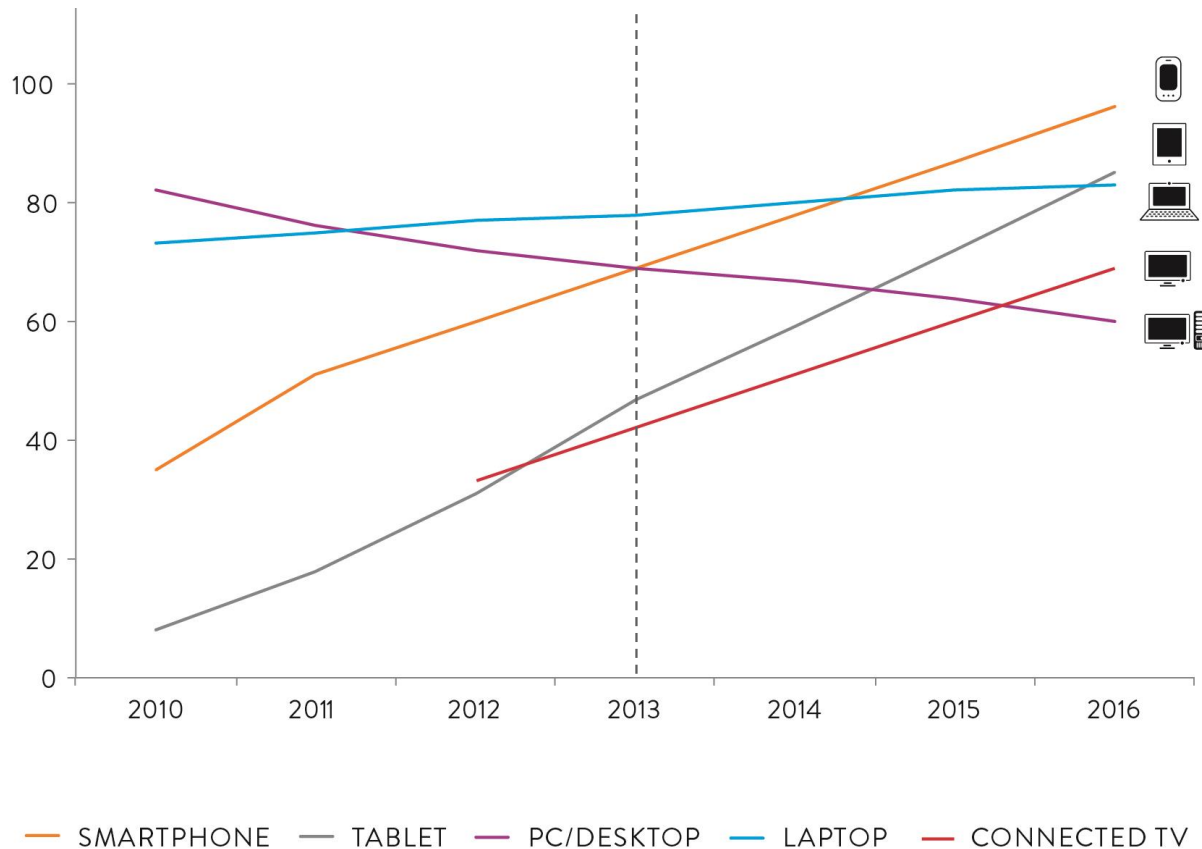
AUSTRALIAN CONNECTED CONSUMERS

EVOLVING PATTERNS OF MEDIA CONSUMPTION
IN THE DIGITAL AGE



FEBRUARY 2014 | 16TH EDITION

THE CONNECTED SCREEN LANDSCAPE 2010-2016



The landscape of 2010 – 2016 shows that there will be evolutionary changes in terms of how consumers will use their devices in the present and the forecasted future. Desktop continues to decline while tablets and mobile are predicted to increase to above 80% household and personal ownership penetration respectively by 2016.

TODAY'S CONNECTED DEVICES AND SCREENS

SMARTPHONE

The connected device in the most hands by 2016

TABLET

Steep growth to meet laptop ownership by end of 2016

DESKTOP

Once dominant but fading in utility as mobility and portability become key

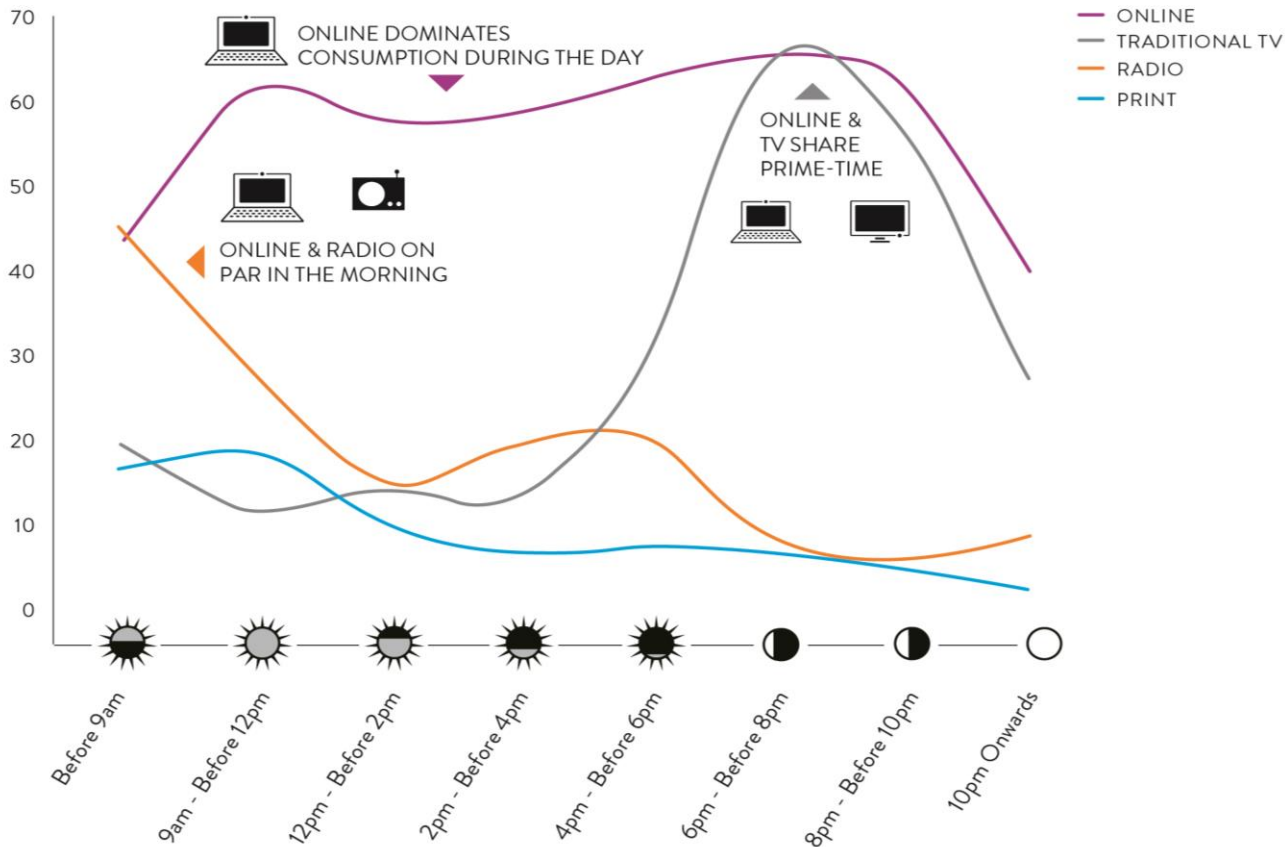
LAPTOP

Still a popular portable screen but sharing the space with the tablets

CONNECTED TV

Another connected screen but consumers slow to utilise its full functionality

THE MEDIA DAY 2013



The typical day's worth of media consumption in 2013 reflected behaviours of modern consumers. Online is the dominant medium of consumption, beginning from the early morning til the very end of night. Online & TV share prime-time also extends the longevity of consumption and further demonstrates Australians' propensity for using multiple forms of media at the same time.

REPORT NOW AVAILABLE

Contact us for further information



The Australian Connected Consumers Report (formerly known as The Australian Online Consumer Report) has been published since 1997 and is now in its 16th annual edition.

The 2014 report analyses the responses of 4,980 online Australians aged 16 years and above, and looks closely at a complex range of new media behaviours, including an expanded look at the online retail habits of the Australian digital consumer.

Some highlights from the report are included on the following pages.

For more information, visit the Nielsen Australia website or email careau@nielsen.com



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AN UNCOMMON SENSE
OF THE CONSUMER™

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