



nielsen

THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

APRIL 2014



STATE OF THE ONLINE LANDSCAPE

April 2014

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

The online landscape in April saw Australians spend close to 38 hours online over 64 sessions. Almost 40 billion minutes were spent online with 33 billion pages viewed.

In this month we look at the categories – Online Games and Computers & Consumer Electronics. Both categories had increases in device engagement; especially online games with mobile and tablet.

We also include a link to the **2014 Advertising and Audiences Report** from the U.S. which highlights key trends in media consumption, video advertising and purchasing behaviour. The U.S. advertising landscape is evolving at an unprecedented rate, influenced largely by two factors: population shifts and media fragmentation.

Please note our April 2014 data updates for streaming data and for the Yahoo!7 and Youtube homepages on pages 27 – 28.

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 points on the sphere.

HIGHLIGHTS: APRIL 2014

NIELSEN ONLINE RATINGS: HYBRID



By the end of 2015, smartphones are expected to overtake laptops as the most commonly owned connected device.



AT A GLANCE: THE ONLINE LANDSCAPE

April 2014



33 billion viewed pages.



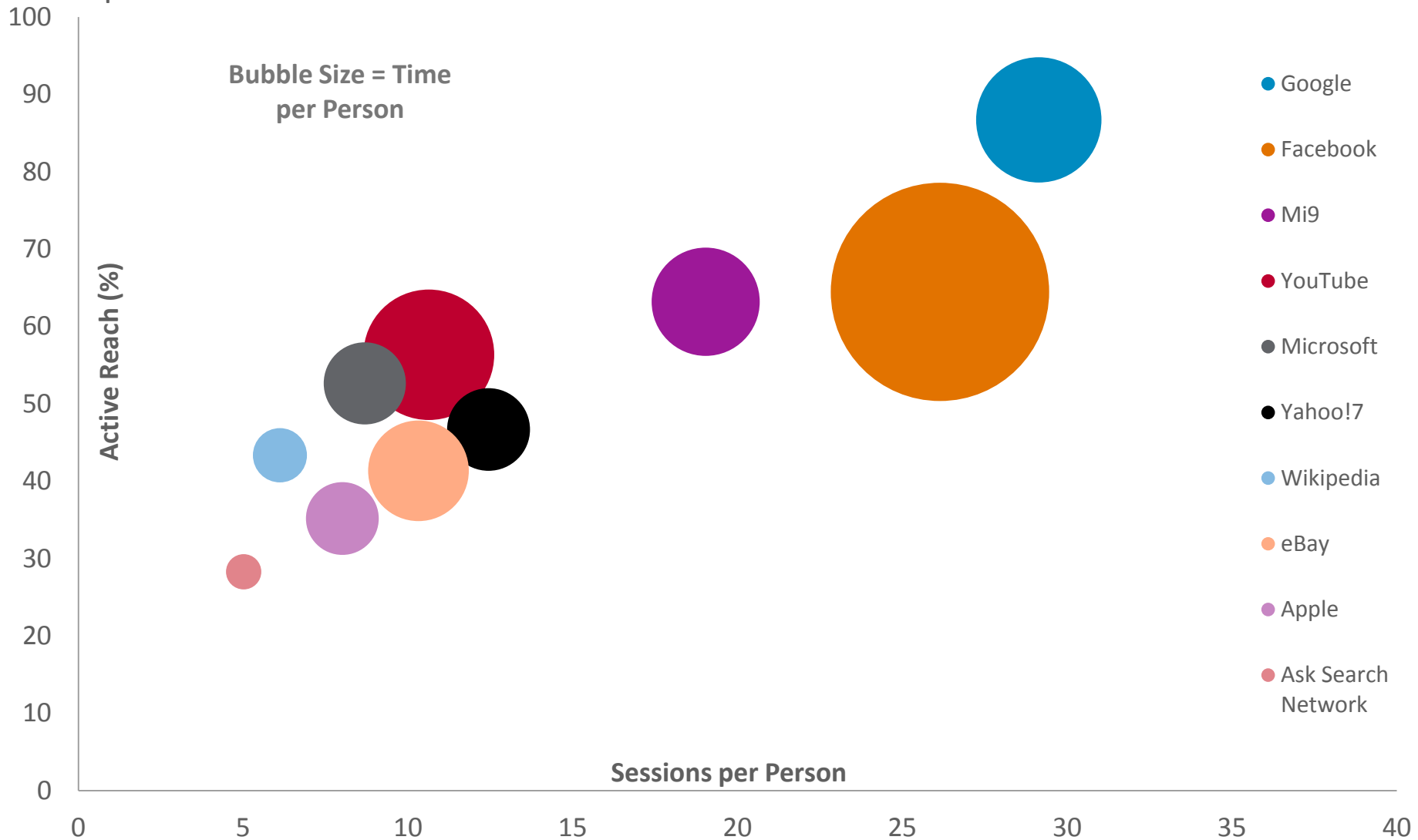
39.9 billion minutes spent.



38 hours spent online, across **64** sessions.

TOP 10 BRANDS AND THEIR ENGAGEMENT

April 2014



TOP 10 BRANDS AND THEIR ENGAGEMENT

April 2014

UA Rank	Brands	Unique Audience (000's)	Page Views (000s)	Active Reach %	Sessions Per Person	Time Per Person
1	Google	15,131	4,093,707	86.72	29.13	02:54:23
2	Facebook	11,250	3,254,112	64.48	26.13	08:47:38
3	Mi9	11,028	1,390,397	63.21	19.03	02:09:26
4	YouTube	9,833	812,461	56.36	10.63	03:09:03
5	Microsoft	9,189	49,356	52.67	8.69	01:14:38
6	Yahoo!7	8,147	445,280	46.69	12.44	01:15:40
7	Wikipedia	7,567	177,588	43.37	6.11	00:32:29
8	eBay	7,217	1,003,099	41.36	10.32	01:52:15
9	Apple	6,140	28,959	35.19	8.01	00:58:50
10	Ask Search Network	4,937	60,682	28.29	5.01	00:13:49

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, April 2014

AGE DEMOGRAPHICS ONLINE

April 2014

2-17

Percentage of Online Aus

6.1%

Average Page Views

312

Av. Time Per Person*

08:28

18-24

Percentage of Online Aus

11.5%

Average Page Views

1,640

Av. Time Per Person*

37:03

25-34

Percentage of Online Aus

19%

Average Page Views

2,187

Av. Time Per Person*

43:27

35-49

Percentage of Online Aus

29.5%

Average Page Views

2,084

Av. Time Per Person*

41:44

50+

Percentage of Online Aus

34%

Average Page Views

1,882

Av. Time Per Person*

37:38

GENDER BREAKDOWN – ACTIVE UNIVERSE

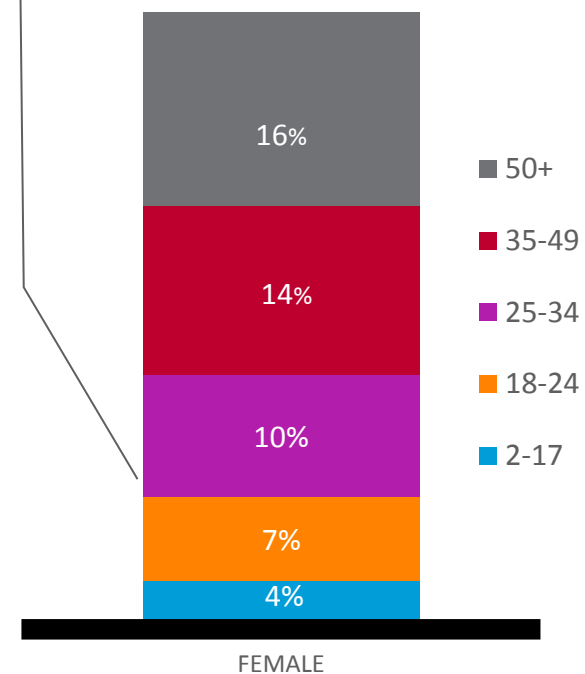
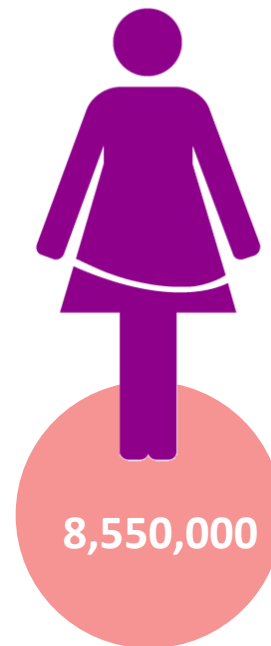
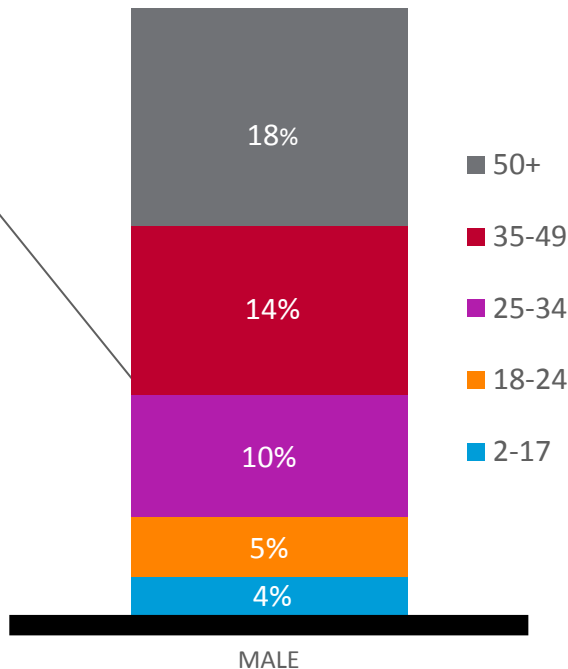
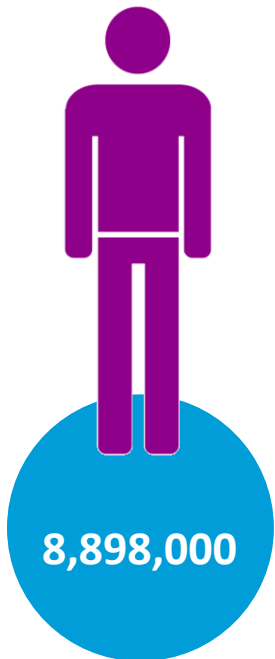
April 2014 – Age Group Highlights

Males were more active online this month compared to March – an increase of two percent or 150,000 male Australians. The biggest age group to contribute to this growth was the 35-49 year olds, this group saw a growth of six percent.

Also, male kids (2-17) saw an incline of 4% - the Easter Break and Public holidays could've influenced this.

In April, Australian females were not as active online. There was a decrease of two percent activity overall. The 25-34 age group was the major contributor to this decline, they had a seven percent shrinkage.

While male kids (2-17) became more active online, female kids were the opposite – a 17 percent drop compared to March.



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 sphere, with thin lines extending from them towards the center of the sphere.

NIELSEN ONLINE RATINGS – HYBRID / MARKET INTELLIGENCE COMPUTERS AND CONSUMER ELECTRONICS

TOP 10 COMPUTERS & CONSUMER ELECTRONICS SITES - AUDIENCE

In the top 10 sites – it is observed that Microsoft, Windows Media Player and Apple have the highest consumer engagement within the category. The top 3 sites have consumers spending **nearly an hour** or more on the websites with around **8 sessions** per person.

Noticeably, µTorrent has robust engagement with its audience. µTorrent would rank 3rd overall in time per person and 1st in terms of sessions per person. More than **60%** of April's unique audience to µTorrent were male.

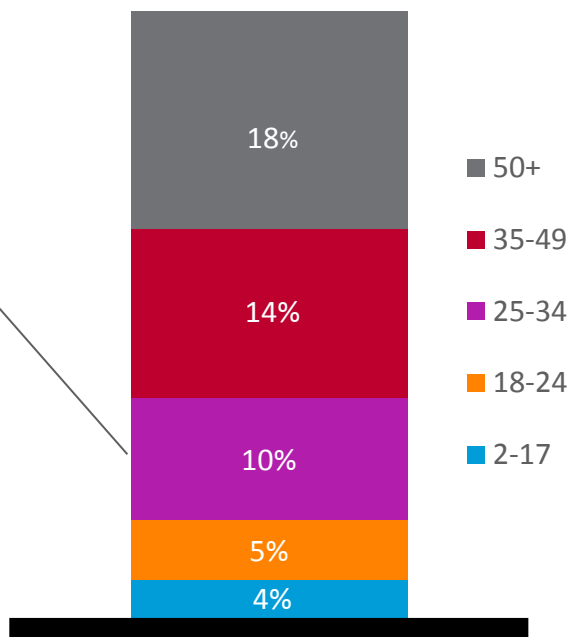
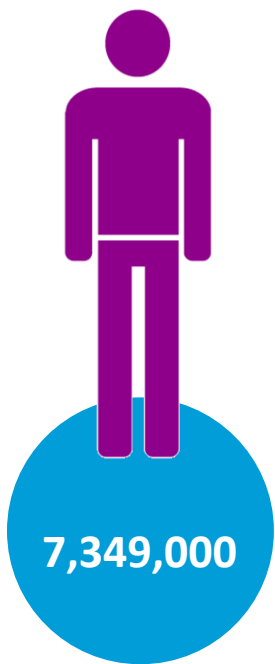
Sites	Unique Audience (000)	Time Per Person	Sessions Per Person	Page Views (000)	Active Reach (%)
	April				
Microsoft	9,189	01:14:38	8.69	49,356	52.67
Windows Media Player	6,681	01:26:14	8.11	N/A	38.29
Apple	6,140	00:58:50	8.01	28,959	35.19
Adobe	4,098	00:07:01	2.46	17,877	23.49
Dropbox	2,775	00:06:39	6.16	16,230	15.90
Apple Product Info & Support	2,581	00:08:22	2.89	20,868	14.79
Microsoft Windows	2,563	00:05:47	2.40	11,943	14.69
NetShelter Technology Media Network	2,419	00:13:44	3.70	29,802	13.87
µTorrent	2,329	01:13:05	22.61	912	13.35
Videolan	2,316	05:43:16	16.59	200	13.27

GENDER BREAKDOWN - AUDIENCE

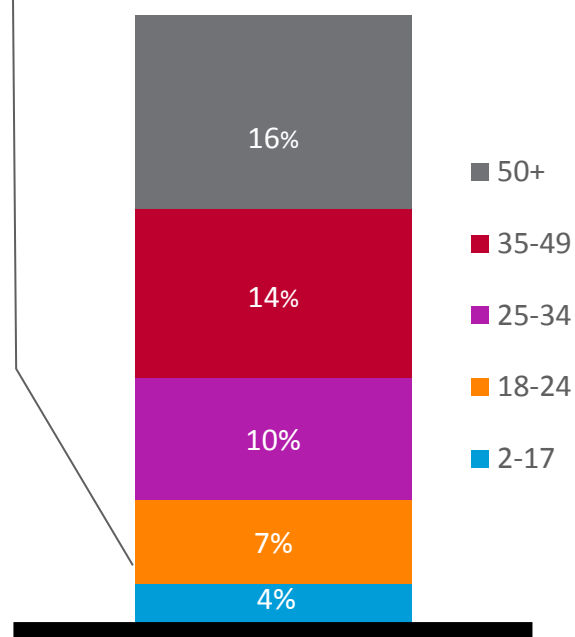
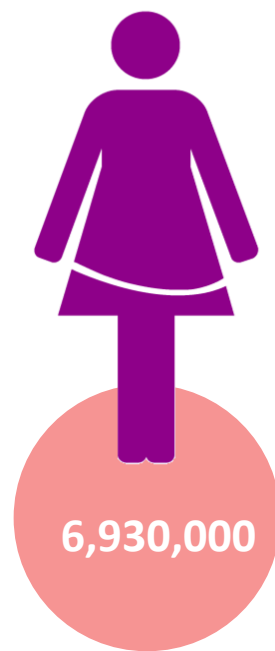
April 2014 – Age Group Highlights – **Computers & Consumer Electronics**

Males 25-34 spend an 1 hour 23 minutes more on computers and consumer electronics sites compared to their female counterparts aged 25-34.

Females 18-24 spent an additional 33 minutes compared to March on computers and consumer electronics sites.



MALE



FEMALE

TOP 15 COMPUTERS & CONSUMER ELECTRONICS SITES - TRAFFIC

Below is a snapshot of the top 15 local ad supported content sites from **Market Intelligence** shows the technology subcategories from News sites are the most dominant sources to get the latest or recent updates regarding computers and consumer electronics.

Sites	Average Daily Unique Browsers	Total Sessions	Average Sessions Duration
April			
News.com.au - Technology	120,701	4,225,606	01:19
CNET	96,334	3,165,392	02:45
Smh.com.au - Technology	79,428	2,559,185	02:24
Gizmodo	56,912	2,087,119	03:03
Lifehacker	52,978	1,836,223	02:27
The Age - Technology	37,310	1,201,445	02:19
TechRadar	17,762	567,367	04:15
ZDNet	13,201	433,583	02:41
Overclockers.com.au	12,891	634,870	05:03
PCMAG	11,945	379,366	03:14
Theguardian - Technology	10,076	317,250	02:55
TechRepublic	8,865	279,416	03:43
Herald Sun - Technology	6,168	193,680	01:35
Brisbanetimes.com.au – Technology	4,991	160,338	02:34
The Australian - Technology	3,508	109,974	01:54

DEVICE TYPE COMPARISON – MARKET INTELLIGENCE - TRAFFIC

Engagement between devices and computers and consumer electronic sites in the month of April have seen an uplift. Desktop, mobile and tablets have all had growth, month-on-month.

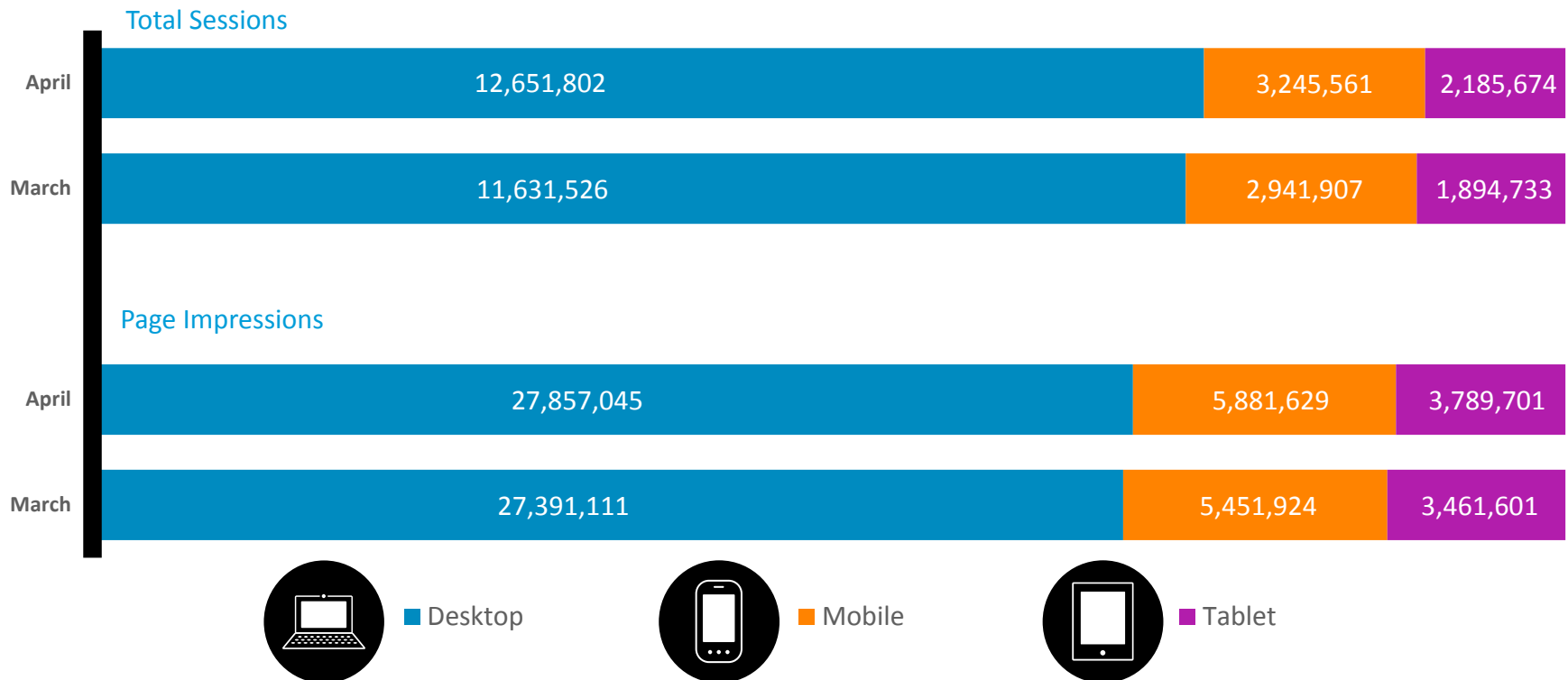
Total Sessions:

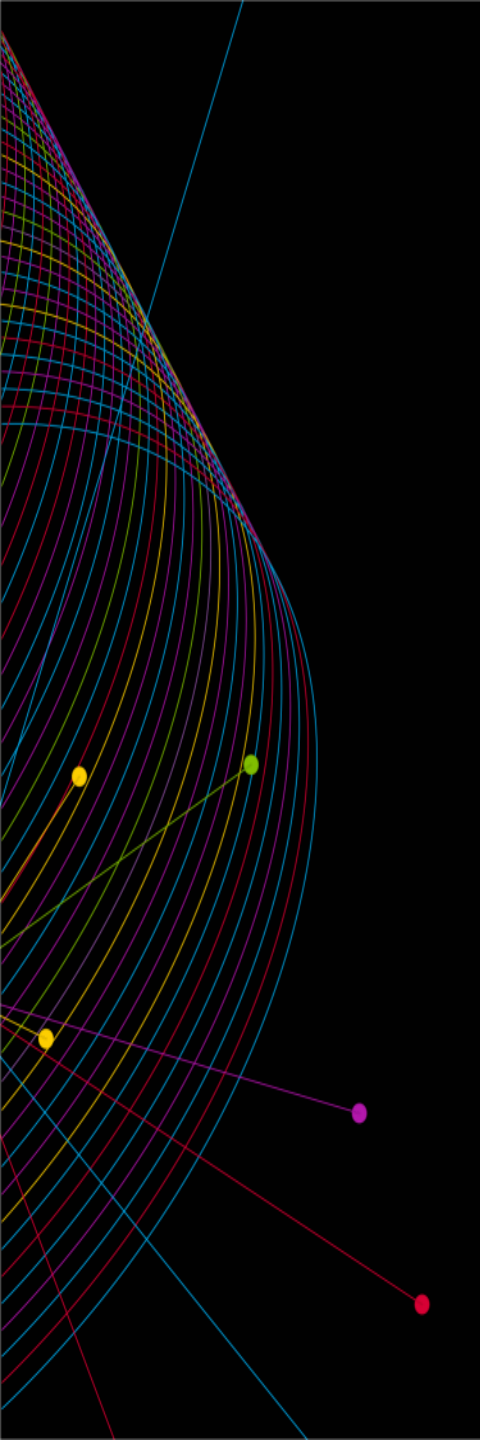
Desktop: **+9%**

Mobile: **+10%**

Tablet: **+15%**

The anticipation and release of new devices could have influenced this increase in total sessions and page impressions. Also, April was a big month for consumer electronics news and launches – Microsoft-Nokia merger, iPhone 6, Samsung Galaxy S5.



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HIGHLIGHTS: APRIL 2014

NIELSEN ONLINE RATINGS: HYBRID STREAMING

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Close to one-in-two connected Australian households own a tablet. Ownership is expected to rise to 59 percent through 2014.

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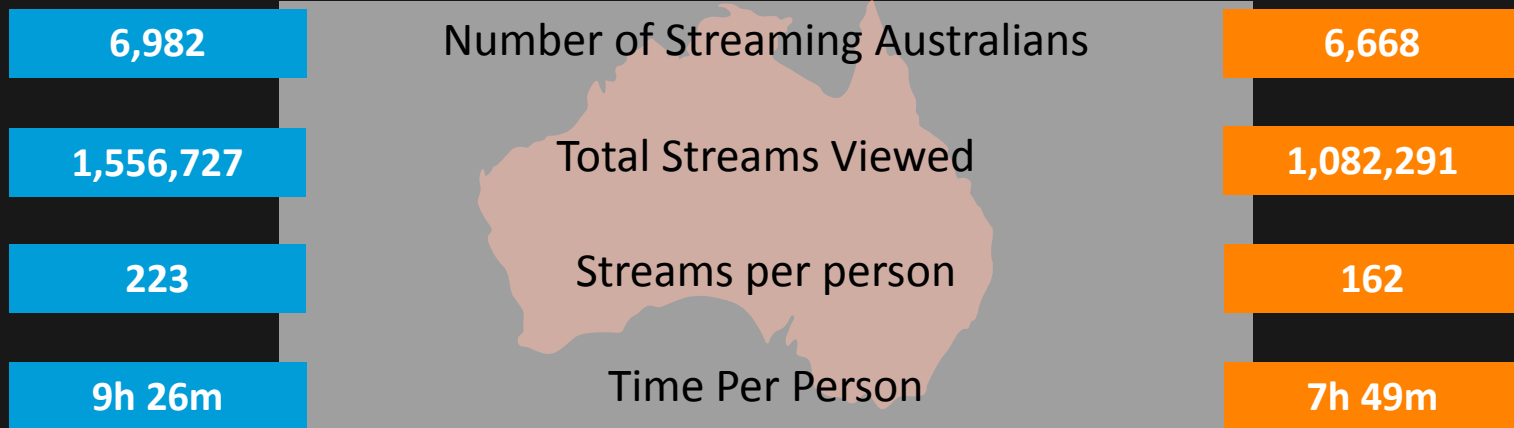
HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

April 2014

UA Rank	Brands	Unique Audience (000s)	Total Streams (000s)	Average Time Spent (HH:MM:SS)
1	YouTube	11,612	1,336,507	05:24:33
2	Facebook	6,133	136,910	01:34:00
3	VEVO	3,232	73,107	00:54:54
4	The CollegeHumor Network	2,932	9,896	00:13:30
5	Mi9	2,640	30,576	00:19:28
6	news.com.au	1,795	12,979	00:09:22
7	Yahoo!7	1,487	6,976	00:17:44
8	smh.com.au	1,258	4,316	00:05:12
9	ABC Online Network	1,197	8,839	02:31:53
10	Vube	879	4,311	00:10:10

HYBRID STREAMING: DEMOGRAPHIC BREAKDOWN

April 2014



In April, Australian males were streaming significantly more compared to last month. The biggest jumps were in **total streams viewed** and **streams per person (+36% and +34% respectively)**. Streaming for Australian females declined slightly.

HYBRID STREAMING: AGE DEMOGRAPHICS

April 2014

2-17

Percentage of Online Aus **5.3%**

Average Streams **213**

Average Time (HH:MM) **08:12**

18-24

Percentage of Online Aus **10.9%**

Average Streams **279**

Average Time (HH:MM) **13:59**

25-34

Percentage of Online Aus **19%**

Average Streams **275**

Average Time (HH:MM) **10:32**

35-49

Percentage of Online Aus **29.5%**

Average Streams **189**

Average Time (HH:MM) **08:59**

50+

Percentage of Online Aus **35.3%**

Average Streams **124**

Average Time (HH:MM) **05:46**

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DEVICE COMPARISON UPDATE: APRIL 2014

NIELSEN MARKET INTELLIGENCE

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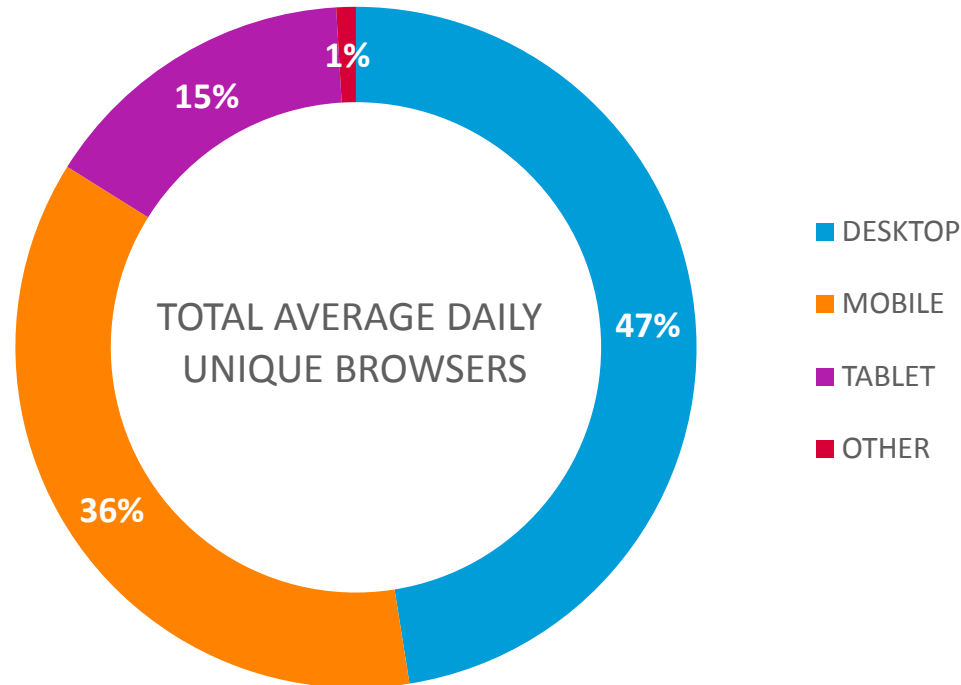
Tablets will overtake the PC by the end of 2017 as one of the most common devices for overall online access.

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DEVICE TYPE COMPARISON (EXCLUDING APPLICATIONS)

April 2014 – Market Domain – Domestic Traffic

53% of total average daily unique browsers are not from desktop



Desktop declined in average daily unique browser usage (-2%) while Mobile gained (+1%) compared to March.

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NIELSEN ONLINE RATINGS – HYBRID / MARKET INTELLIGENCE ENTERTAINMENT – ONLINE GAMES

GROWTH IN THE TOP 10 ONLINE GAMES SITES - AUDIENCE

In this month of April, the online games category saw substantial gains in traffic compared to last month; there was a **six percent** growth in the overall category.

Eighty percent of the Top 10 online games sites had upsurges in unique audience . EA – Electronic Arts Online (+44%), EBgames.com.au (+20%) & GameNutt (+76%) had the greatest gains month-on-month.

Sites	Unique Audience (000)			Time Per Person	Sessions Per Person
	March	April	Growth (%)	April	April
Steam	1,265	1,326	5	01:33:38	19.73
King.com	1,127	1,072	-5	05:01:08	15.89
GameSpot Network	653	748	15	00:21:56	4.56
IGN Gaming Websites	536	639	19	00:32:11	7.25
EA - Electronic Arts Online	382	549	44	07:24:34	11.43
Origin	N/A	491	N/A	00:17:02	10.86
Zynga	455	489	7	10:29:43	23.62
EBGames.com.au	377	452	20	00:10:36	2.10
GameNutt	225	397	76	00:10:02	2.39
Blizzard Entertainment	337	369	9	06:15:24	10.04

Note: The online gaming sites are a representative group of local gaming sites

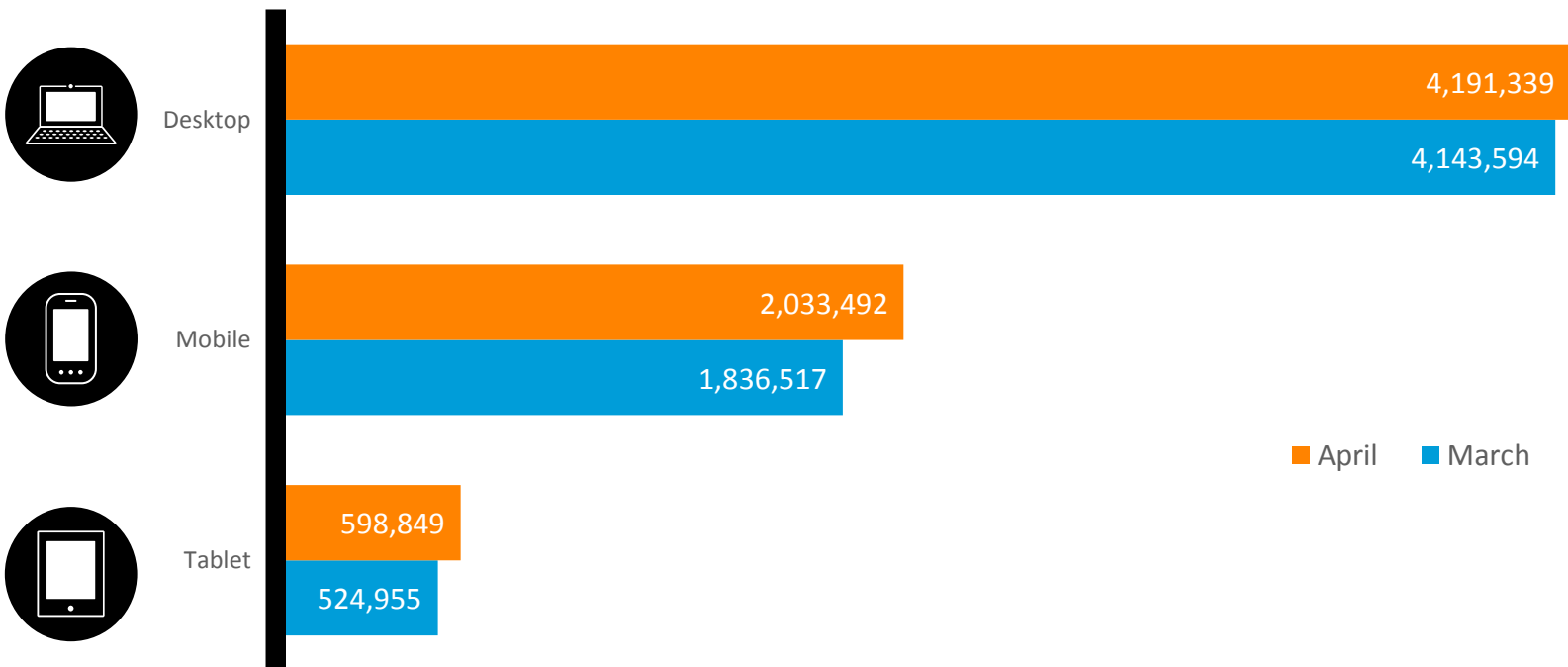
Source: Nielsen Online Ratings – Hybrid, April 2014

DEVICE TYPE COMPARISON – MARKET INTELLIGENCE - TRAFFIC

During the March to April period, all three devices (Desktop/Mobile/Tablet) had positive growth in total sessions. Interestingly, Mobile and Tablet's growth in total sessions more than doubles the growth of page impressions:

- Mobile had **11 percent** growth in total sessions and **four percent** growth in page impressions.
- Tablet had **14 percent** growth in total sessions and **six percent** growth in page impressions.
- While Desktop had a slight increase in total sessions (**+1%**) and a minor decrease in page impressions (**-4%**).

Note: online gaming sites measured are a representative group of local gaming sites.



Metrics: Total Sessions

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

UPDATES FOR THIS MONTH

NIelsen HYBRID STREAMING DATA

1. This month, hybrid streaming data was released but we identified it had not rendered correctly in the interface. We removed the April streaming data from the interface swiftly and our operations team worked overnight to correct the issue. We then re-released the data to the Nielsen interface the morning of the 15th. We apologise for the inconvenience this delay may have caused.
2. This month there was an issue identified with the Ninemsn streaming figures. While Nielsen worked with MI9 to explain the error – it was in no part caused by Mi9. The outcome was that there was an error in time and stream metrics that unintentionally double counted up to the brand. This error has now been fixed and is reflected in the latest months figures (31 million), which are now correct. Nielsen regret this error and have implemented additional process improvements to ensure this is not repeated.
3. This issue relating to Ninemsn video streaming data is unrelated to issues experienced in June 2013 for News Corp Australia. In that circumstance, data inconsistencies were due to technological challenges with the implementation of Nielsen tagging on new technology deployed by News Corp Australia.

NIELSEN UPDATE: YOUTUBE + YAHOO!7 HOMEPAGES – APRIL 2014

- During the quality checks of April 2014 data, we identified large decreases in global traffic for Yahoo! Homepage and YouTube Homepage. We determined both these decreases were related to a transition to HTTPS which was not reflected in their 'Homepage' Channels' processed results (but included in their 'Brand' data). Further investigation confirmed that our MarketView classification tool requires 'https://' within the URL pattern for the 'exact match' required with Homepage patterns.
- For April 2014, these channels will be masked globally. Beginning with May 2014 data, the results for Yahoo! Homepage and YouTube Homepage (including HTTPS data) will be inclusive of HTTP and HTTPS results.

Audience metrics for the brands of Youtube and Yahoo!7 are not affected by the masking of the homepages for this month.

ADVERTISING AND AUDIENCES: U.S. STATE OF THE MEDIA

MEDIA AND ENTERTAINMENT - US

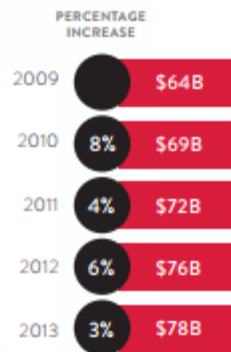
The advertising landscape is evolving at an unprecedented rate, influenced largely by two factors: population shifts and media fragmentation.

To understand how they're engaging with audiences and to maximize ad effectiveness, advertisers need to optimize and measure audience delivery, brand lift and sales impact with common metrics across screens.

To read more, please visit:

<http://www.nielsen.com/us/en/reports/2014/advertising-and-audiences-state-of-the-media.html>

TELEVISION AD SPEND, 2009-2013



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