



nielsen

# THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

MAY 2014



# STATE OF THE ONLINE LANDSCAPE

May 2014

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

This month we investigate the Automotive and Real Estate categories. Both categories had successful months in terms of audience and device engagement.

In the month of May we saw Australians spend on average 41 hours online over 67 sessions. This time spent online generated nearly 44 billion minutes and 35 billion pages viewed. We also saw audiences streaming more content compared to last month.

Please note that since the launch of Hybrid data in 2011 - Nielsen Online Ratings Hybrid has included the consumption of site content via mobile and tablet devices. There is currently no data from the Nielsen and IAB mobile pilot included in the Nielsen Online Ratings measurement data.

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](mailto: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: MAY 2014

## NIELSEN ONLINE RATINGS: HYBRID

“

Smartphones and tablets are helping to broaden the reach of retailers. More than one in 10 shoppers now purchase using their smartphone and the same proportion purchase via tablet (13%).

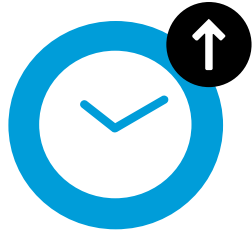
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# HYBRID SURFING : KEY METRICS AT A GLANCE

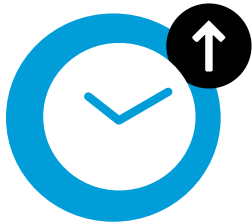
May 2014



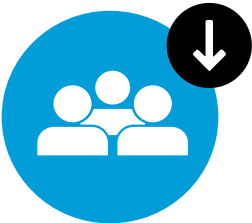
**35 billion** viewed pages.



**43.5 billion** minutes spent.



**41 hours** spent online, across **67 sessions**.

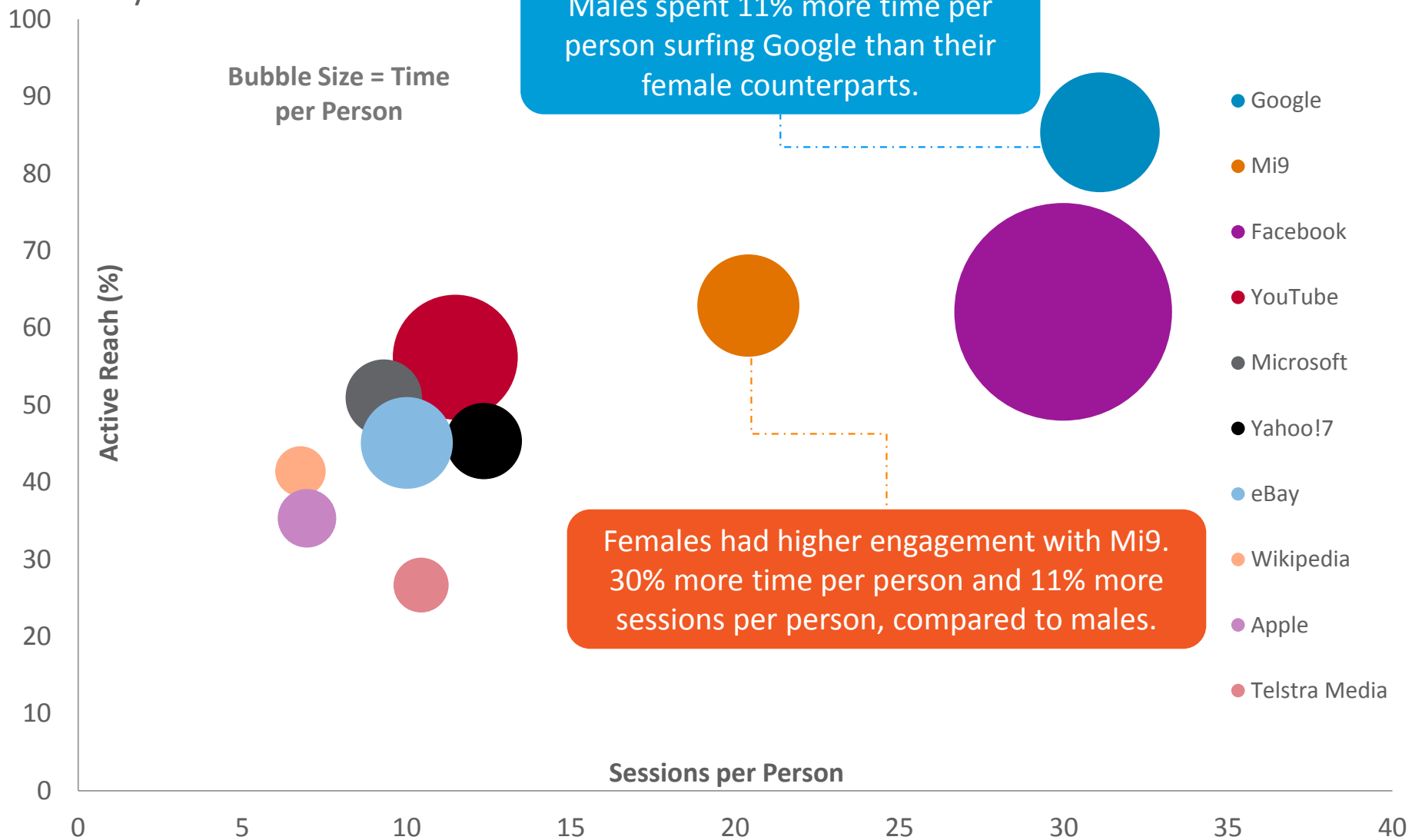


**17,337,000** people were actively surfing online.

↑ ↓ Indicates growth or decline based on the previous month

# TOP 10 BRANDS AND THEIR ENGAGEMENT

May 2014



# TOP 10 BRANDS AND THEIR ENGAGEMENT

May 2014

Unique Audience Rank	Brands	Unique Audience (000s)	Page Views (000s)	Active Reach (%)	Sessions Per Person	Time Per Person
1	Google	14,799	4,084,990	85.36	31.10	03:18:12
2	Mi9	10,906	1,538,618	62.91	20.39	02:24:16
3	Facebook	10,765	3,663,083	62.09	29.98	10:55:22
4	YouTube	9,747	889,973	56.22	11.47	03:36:11
5	Microsoft	8,837	53,744	50.97	9.30	01:20:56
6	Yahoo!7	7,860	428,477	45.34	12.34	01:20:29
7	eBay	7,820	1,081,251	45.10	10.00	01:57:02
8	Wikipedia	7,182	174,115	41.42	6.76	00:34:58
9	Apple	6,124	30,821	35.32	6.96	00:47:22
10	Telstra Media	4,625	138,291	26.68	10.44	00:41:54

\*Unique Audience

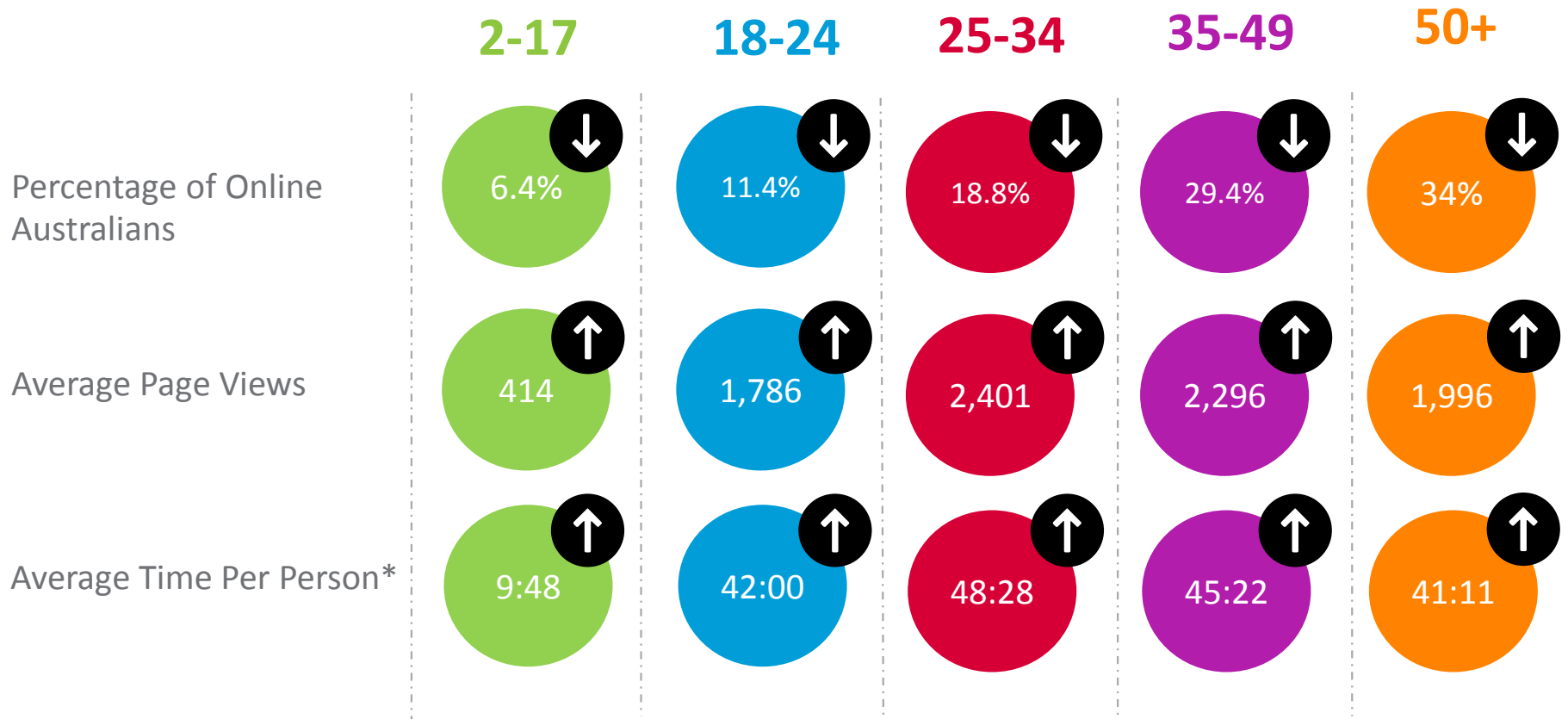
\*Total Page Views

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, May 2014

# HYBRID SURFING: AGE DEMOGRAPHICS ONLINE

May 2014



↑ ↓ Indicates growth or decline based on the previous month

\*HH:MM

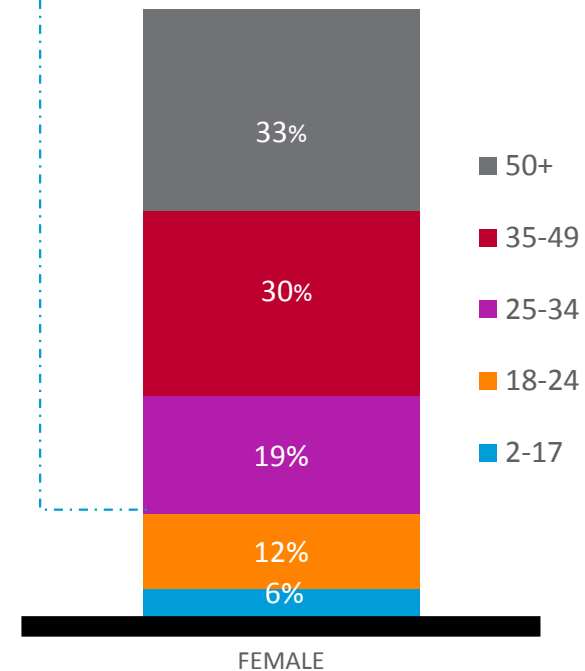
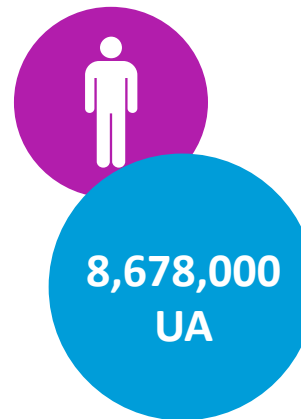
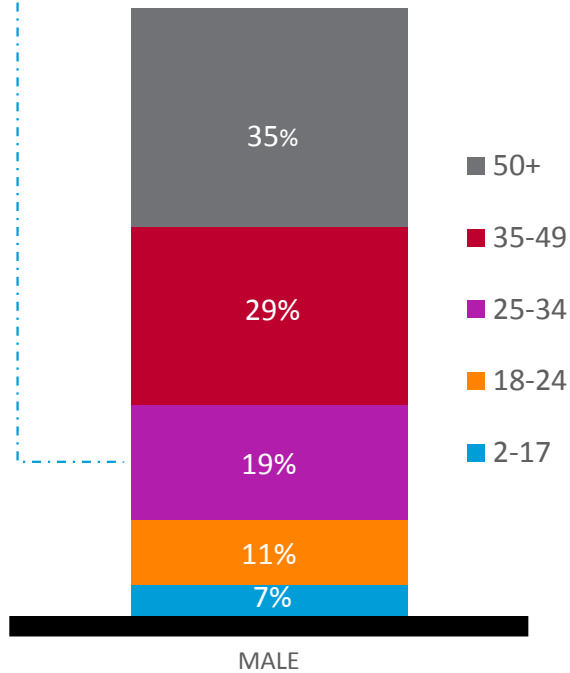
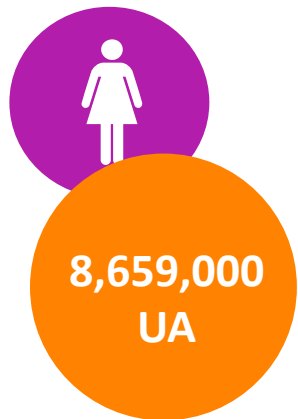


# GENDER BREAKDOWN – ACTIVE UNIVERSE

May 2014 – Age Group Highlights

Males were less active this month – a 3% drop. The 25-34 age group saw the biggest decline in active users – 7% decrease.

In May, Australian females were more active online; nearly 2% more active Australian females. This increase was hugely contributed by the females who are aged between 25-49.



Source: Nielsen Online Ratings – Hybrid, April 2014

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# NIELSEN ONLINE RATINGS – HYBRID / MARKET INTELLIGENCE AUTOMOTIVE



# TOP 10 AUTOMOTIVE SITES – SNAPSHOT - AUDIENCE

Automotive sites had a successful month in terms of audience engagement.

Month-on-month comparisons:

- 7 out of the top 10 sites had growth in **Unique Audience**
- 6 out of the top 10 sites had stronger audience engagement this month i.e. increases in **Sessions Per Person – Drive.com.au** and **rac.com.au** had the highest increases; **18%** and **46%**, respectively.
- 6 out of the top 10 sites were spending more **Time Per Person** – major jumps for **Carsales.com.au**, **Drive.com.au**, **CarAdvice** and **rac.com.au**– **22%**, **61%**, **87%** and **109%**, respectively.

Sites	Unique Audience (000s)		Variance Change	Time Per Person*	Sessions Per Person
	April	May	Percentage (%)	May	May
Carsales.com.au	1,235	1,295	5%	01:46:50	6.76
Drive.com.au	949	740	-22%	00:10:39	3.22
carsGuide.com.au	467	489	5%	00:18:52	3.36
CarAdvice	242	263	9%	00:28:01	3.22
The Red Book	149	186	25%	00:15:19	2.98
AutoGuide.com Network	103	180	75%	00:04:37	1.49
Rac.com.au	198	172	-13%	00:16:05	2.04
eBay Motors	112	121	8%	00:02:59	2.54
The Motor Report	75	119	59%	00:04:08	1.67
CarPoint.com.au	143	114	-20%	00:47:41	3.28

\*HH:MM:SS

Source: Nielsen Online Ratings – Hybrid, April & May 2014



# DEVICE TYPE COMPARISON – TOTAL SESSIONS - TRAFFIC

Market Intelligence supports the traffic growth within the Automotive category.

- Looking at the Top 10 Sites in terms of total sessions, May saw a **5% growth** compared to last month.

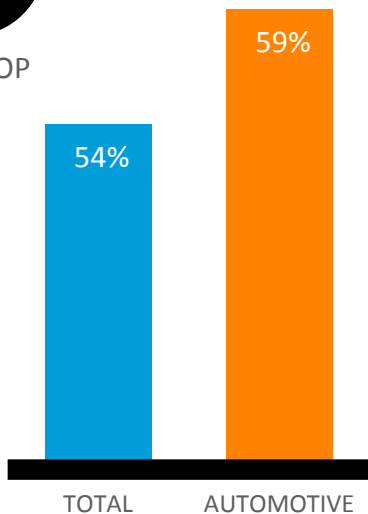
**Forty-five percent** of total online sessions traffic for the automotive category was from a portable device – specifically, **smartphone (30%)** and **tablet (15%)**.

Given the market aggregate (total) for Tablet engagement is 12% we see this automotive category with a higher than average engagement via tablet devices.



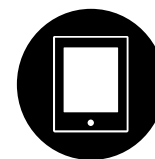
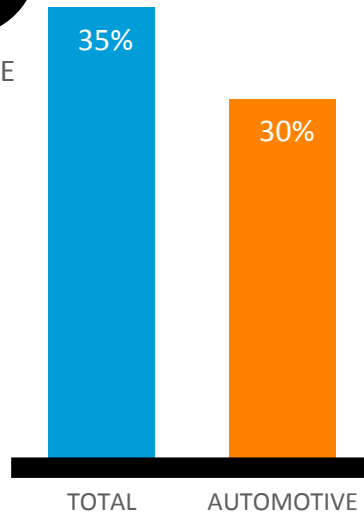
DESKTOP

■ TOTAL ■ AUTOMOTIVE



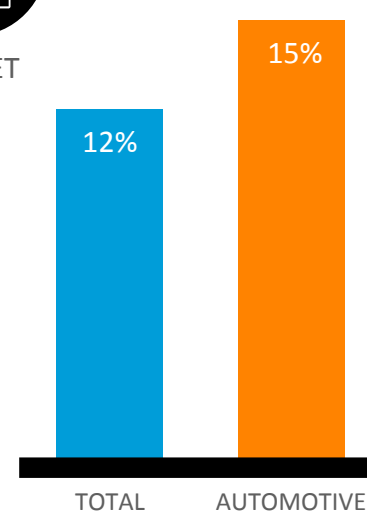
MOBILE

■ TOTAL ■ AUTOMOTIVE



TABLET

■ TOTAL ■ AUTOMOTIVE



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# HIGHLIGHTS: MAY 2014

## NIELSEN ONLINE RATINGS: HYBRID STREAMING

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In metro homes, tablet ownership went from 34 to 49 percent. (Comparing 2012 versus 2013)

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# HYBRID STREAMING KEY ONLINE STATISTICS

May 2014



**3.3 billion** streams watched.



**6.5 billion** minutes streamed.



**8 hours and 12 minutes** spent streaming per person.



**13,318,000** people were actively streaming online.  
-2% compared to last month.

# HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

May 2014

Unique Audience Rank	Brands	Unique Audience (000's)	Total Streams	Time Per Person
1	YouTube	11,334	1,494,451	05:07:55
2	Facebook	5,436	112,372	01:03:14
3	VEVO	3,725	82,445	00:50:21
4	The CollegeHumor Network	2,821	10,273	00:15:31
5	Mi9	2,732	32,862	00:19:29
6	news.com.au	1,832	12,687	00:08:10
7	Yahoo!7	1,513	12,931	00:46:39
8	ABC Online Network	1,348	9,379	02:09:14
9	smh.com.au	1,339	4,691	00:07:17
10	Vube	902	5,532	00:08:57

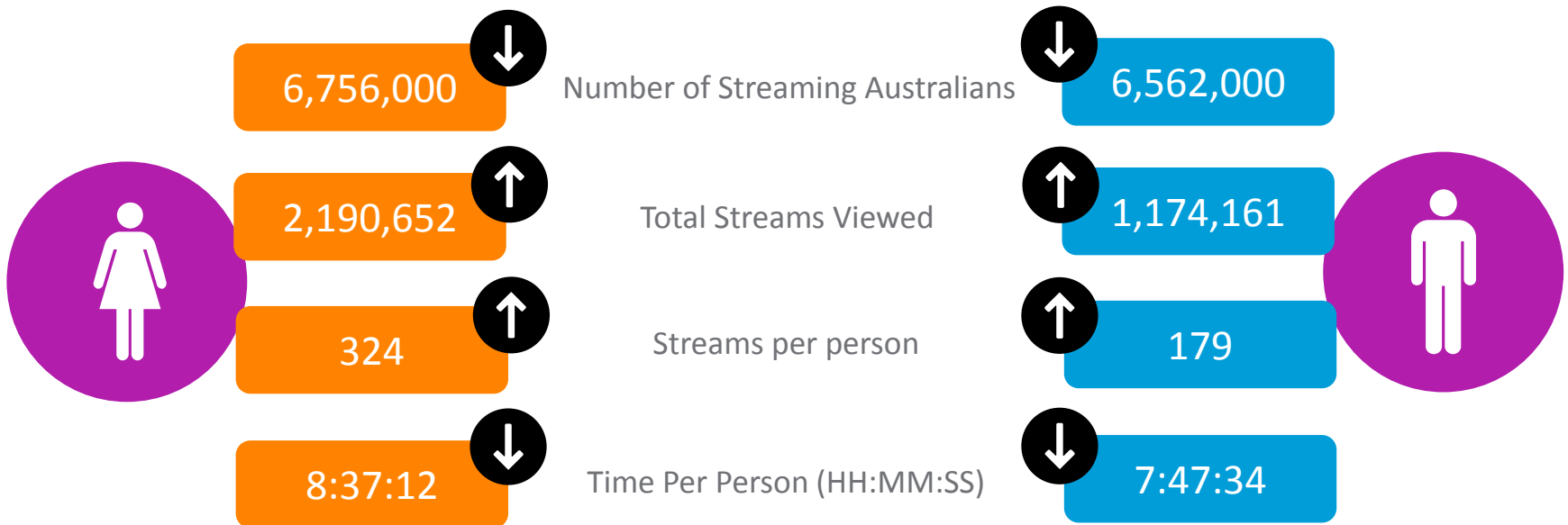
Including web-based applications

Source: Nielsen Online Ratings – Hybrid, May 2014



# HYBRID STREAMING: DEMOGRAPHIC BREAKDOWN

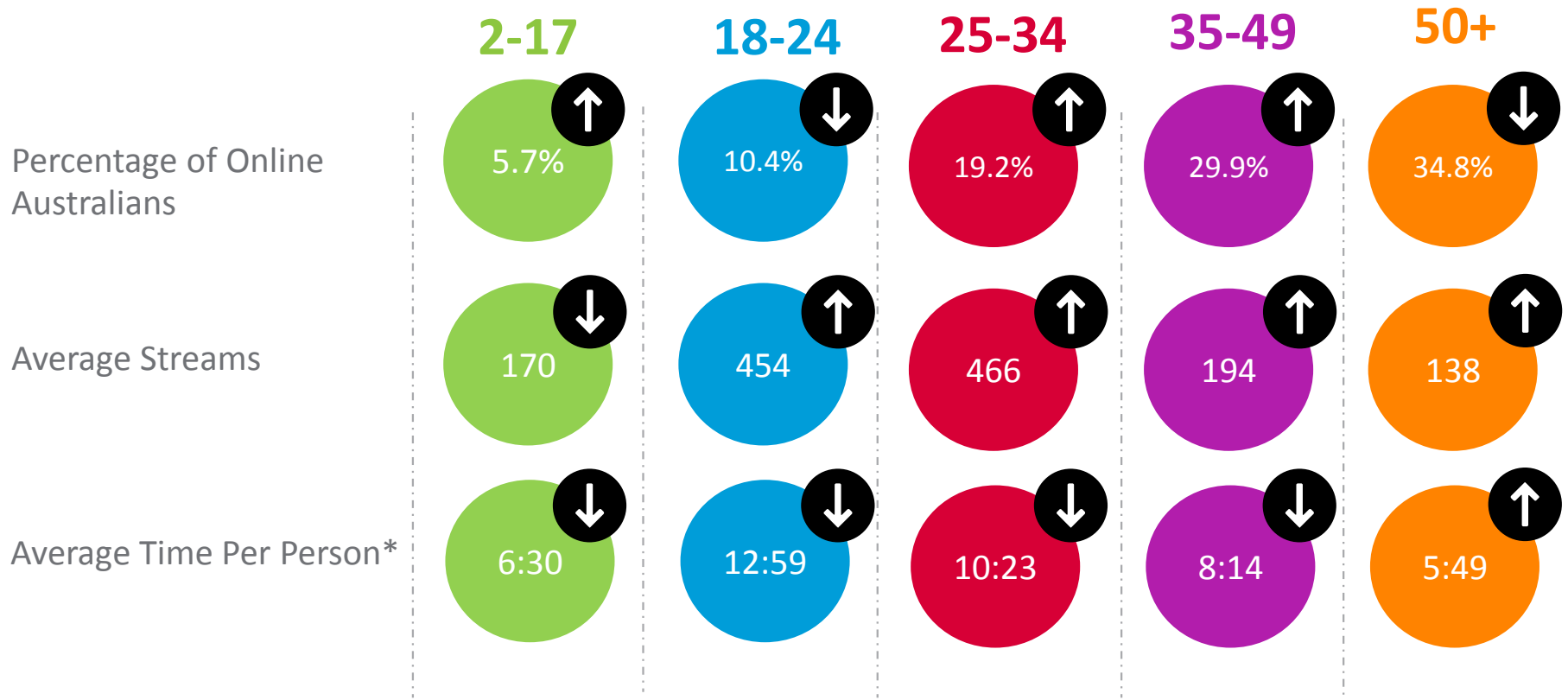
May 2014



May was a huge month for streaming for both female and male Australians. **Streams per person** (Male plus Female) had a huge jump – **31% increase**.

# HYBRID STREAMING: AGE DEMOGRAPHICS ONLINE

May 2014



↑ ↓ Indicates growth or decline based on the previous month

\*HH:MM

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 right.

# DEVICE COMPARISON UPDATE: MAY 2014

## NIELSEN MARKET INTELLIGENCE



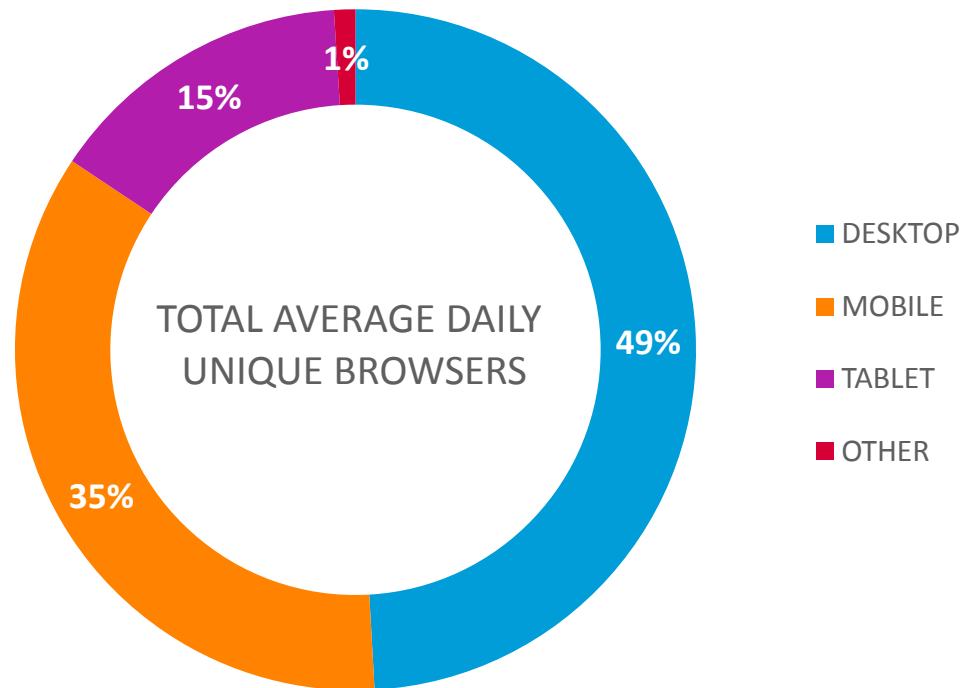
Smartphone ownership has almost doubled since 2010, now exceeding two thirds of connected consumers.



# DEVICE TYPE COMPARISON (EXCLUDING APPLICATIONS)

May 2014 – Market Domain – Domestic Traffic

**51%** of total average daily unique browsers are not from desktop



Desktop slightly increased (+2%) in average daily unique browser usage.

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 surface of the sphere, with thin lines extending from them towards the center or other points on the sphere.

# NIELSEN ONLINE RATINGS – HYBRID / MARKET INTELLIGENCE REAL ESTATE / APARTMENTS



# TOP 10 REAL ESTATE/APARTMENT SITES - AUDIENCE

The Real Estate / Apartment category at a total level had stronger audience engagement this month, compared to April.

- 4,742,000 Australians visited Real Estate / Apartment sites in May.
- Audiences were spending up to **8 minutes or 10% more Time Per Person** on Real Estate / Apartment sites.
- Audiences were returning to a site more frequently as well, **Sessions Per Person increased by 6%**.

Sites	Unique Audience		Variance Change	Time Per Person	Sessions Per Person
	April	May	Percentage (%)	May	May
Realestate.com.au	3,407	3,414	0.2%	01:17:18	8.33
Domain	1,640	1,626	-1%	00:38:29	7.14
OnTheHouse.com.au	499	503	1%	00:07:41	3.33
Realestateview.com.au	378	430	14%	00:11:44	2.68
Allhomes.com.au	217	288	33%	00:31:50	4.56
Realcommercial.com.au	195	213	9%	00:28:01	3.50
Ray White	125	171	37%	00:11:21	3.39
Homesales.com.au	188	163	-13%	00:12:34	2.90
Property.com.au	122	128	5%	00:06:42	2.17
LJ Hooker	221	124	-44%	00:06:05	2.02



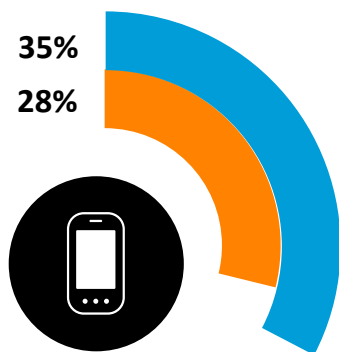
# INCREASED FREQUENCY TO REAL ESTATE SITES

## TRAFFIC – MARKET INTELLIGENCE

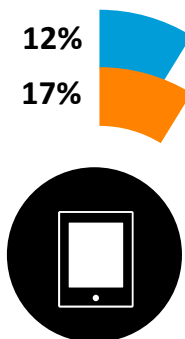
Real Estate / Apartment Sites had a huge month in terms of device engagement and traffic.

- Mobile and Tablet had the highest growth in Total Sessions – **both +11%**.
- Desktop was close behind - **+10%**.

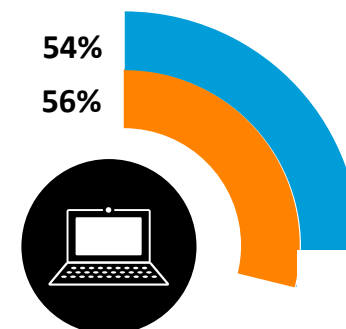
**Forty-five percent** of total online sessions traffic for the real estate / apartment category was from **mobile (28%)** and **tablet (17%)** devices. Tablet, in particular had higher than average engagement – **5%** more engagement within the category compared to the total.



Metric: Total Sessions (000)



Metric: Total Sessions (000)



Metric: Total Sessions (000)





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

# UPDATES FOR THIS MONTH

# NIelsen HYBRID DATA

## NOTE:

Nielsen Online Ratings Hybrid data has included consumption of site content via mobile and tablet devices since Hybrid launched in 2011. There is currently no data from the Nielsen and IAB mobile pilot included in the Nielsen Online Ratings measurement data.

The IAB Pilot will give us three very important enhancements in the future:

- Audiences, demographics and individual engagement for **Applications on mobile and tablets** – currently **not** included in Online Ratings.
- The ability to break out audience metrics, demographics and individual engagement with mobile and tablet devices
- The ability to hybridise with using an expanded panel – desktop home and work as well as mobile and tablet. Enabling the inclusion of behavioural data for mobile and tablet devices to enhance the Hybrid model.

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