



nielsen

# THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

JUNE 2014

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# STATE OF THE ONLINE LANDSCAPE

June 2014

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

The online landscape in June saw Australians spend 38 hours online over 64 sessions. With nearly 40 billion minutes spent online with 31 billion pages viewed. For this month, there were more Australian Males active online compared their female counterparts.

Also, for June; we deep dive into the Sports and Mass Merchandiser categories. Sports had a great month for audience and device engagement while the Mass Merchandiser category saw prominent growth within the top sites and as an overall category.

Please note the updates for this month:

- Google accepts Nielsen Online Ratings tags
- Nielsen Online Brand Effect now includes viewability brand lift metric
- Latest findings from IAB/ Nielsen Mobile Audience Measurement Pilot
- Latest news about Consumer 360

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).





# HIGHLIGHTS: JUNE 2014

## NIELSEN ONLINE RATINGS: HYBRID

“

New retail' habits are emerging as digital and physical retail landscapes converge. Six in 10 online Australians now use a multi-channel approach during their path to purchase.

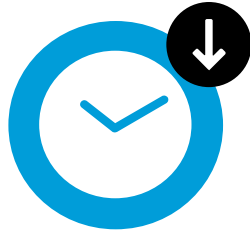
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# HYBRID SURFING: KEY METRICS AT A GLANCE

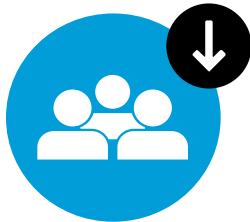
June 2014



**31 billion** viewed pages.



**40 billion** minutes spent.



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



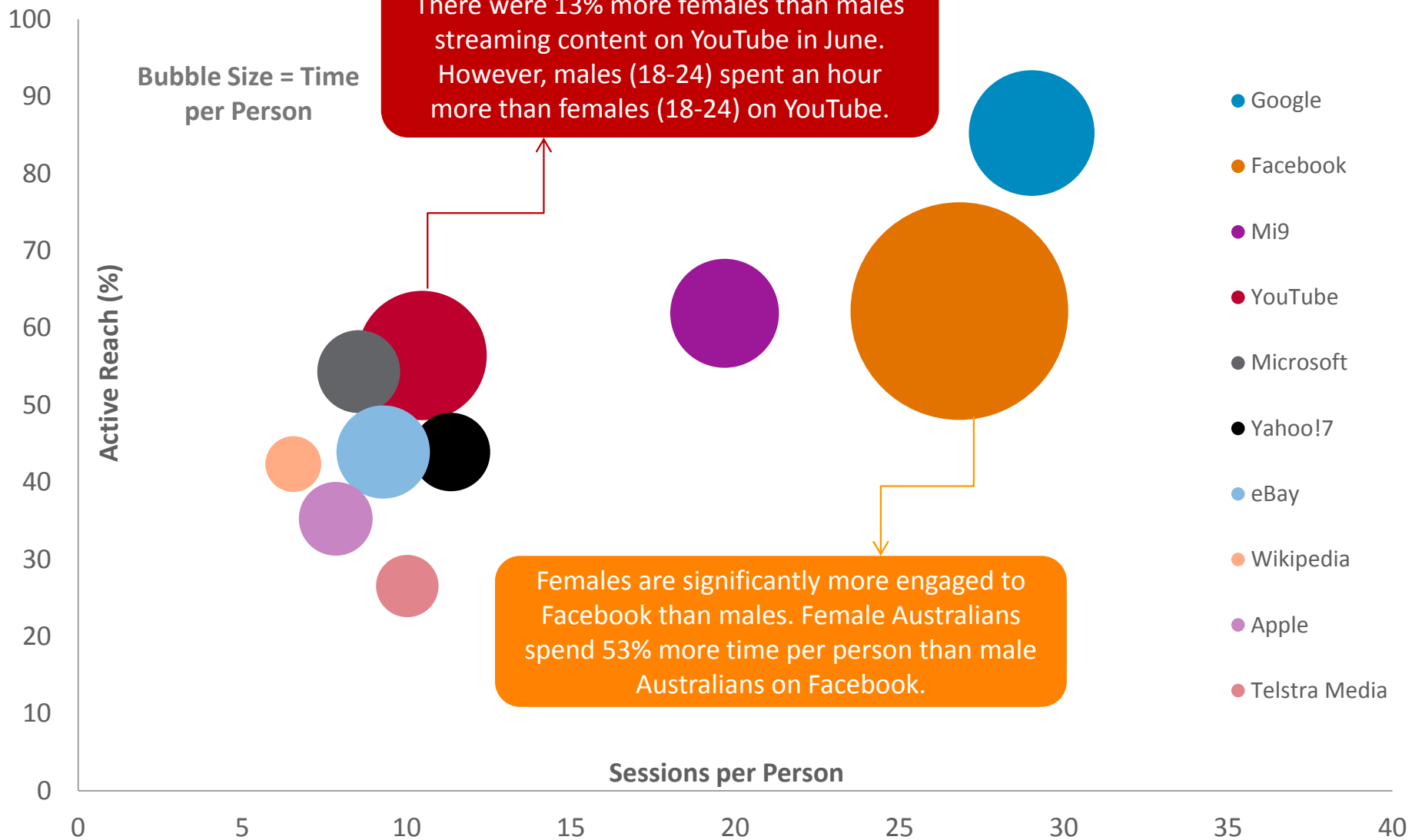
**17,337,000** people were actively surfing online.



Indicates growth or decline based on the previous month

# TOP 10 BRANDS AND THEIR ENGAGEMENT

June 2014



# TOP 10 BRANDS AND THEIR ENGAGEMENT

June 2014

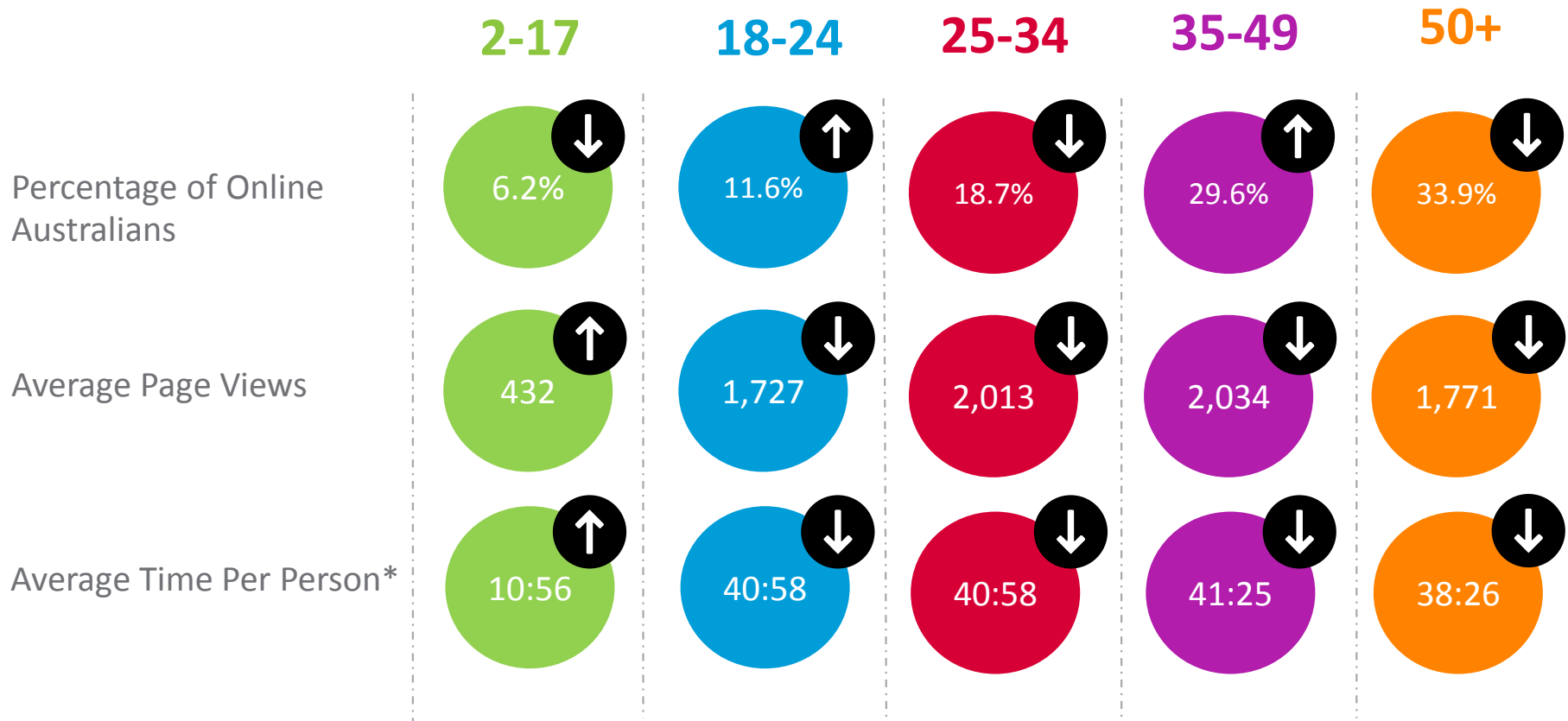
Unique Audience Rank	Brands	Unique Audience (000s)	Page Views (000s)	Active Reach (%)	Sessions Per Person	Time Per Person
1	Google	14,831	3,844,158	85.26	29.02	03:03:56
2	Facebook	10,819	2,785,738	62.20	26.82	09:11:28
3	Mi9	10,768	1,401,426	61.90	19.67	02:18:10
4	YouTube	9,818	819,304	56.44	10.47	03:14:29
5	Microsoft	9,453	52,871	54.34	8.53	01:20:06
6	Yahoo!7	7,642	368,882	43.93	11.34	01:11:48
7	eBay	7,641	940,854	43.93	9.28	01:41:29
8	Wikipedia	7,367	188,084	42.35	6.55	00:36:19
9	Apple	6,133	27,606	35.25	7.84	01:03:23
10	Telstra Media	4,619	144,473	26.55	10.02	00:45:16

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, June 2014

# HYBRID SURFING: AGE DEMOGRAPHICS ONLINE

June 2014



↑ ↓ Indicates growth or decline based on the previous month

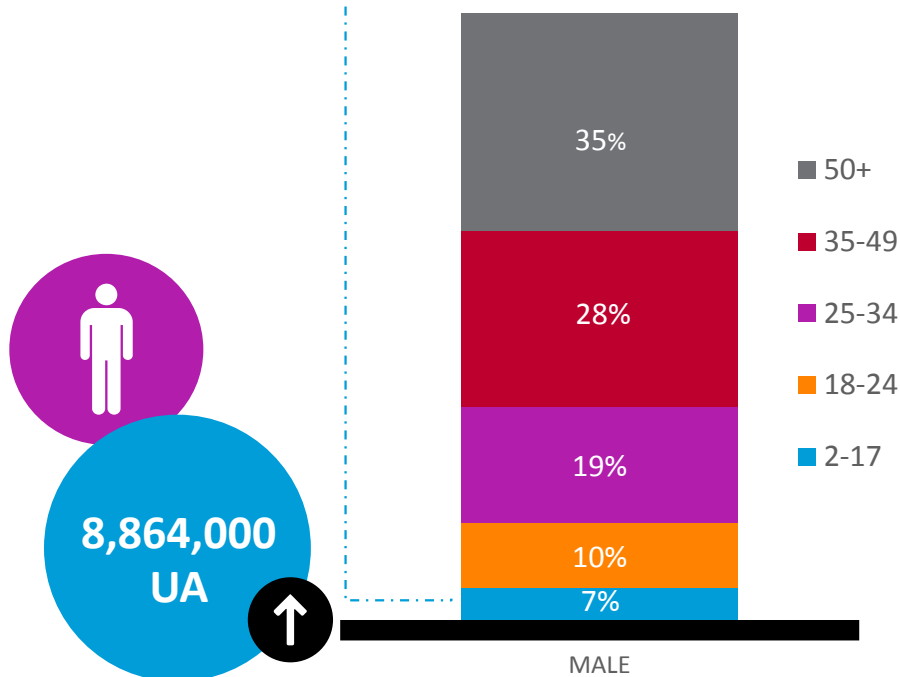
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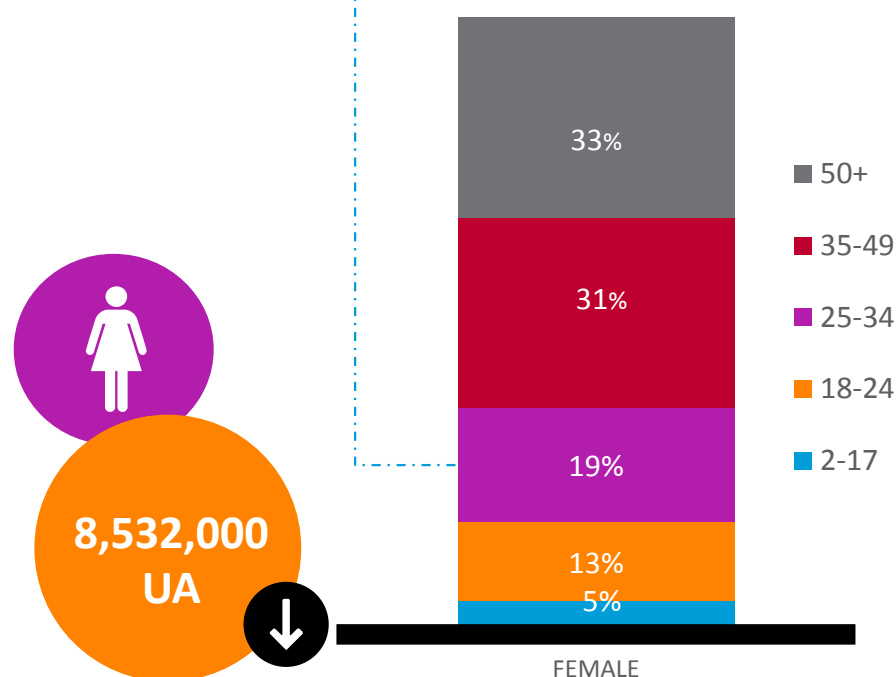
# GENDER BREAKDOWN – ACTIVE UNIVERSE

June 2014 – Age Group Highlights

Overall, there were more Australian males being active online this month – a 2% increase or a total increase of 205,000 male individuals. The age group of 2-17 saw the biggest growth - +6%, compared to last month.



Female Australians were less active online, compared to last month. The drops came from the 2-17 and 25-34 age group – 13% and 4% decreases, respectively.





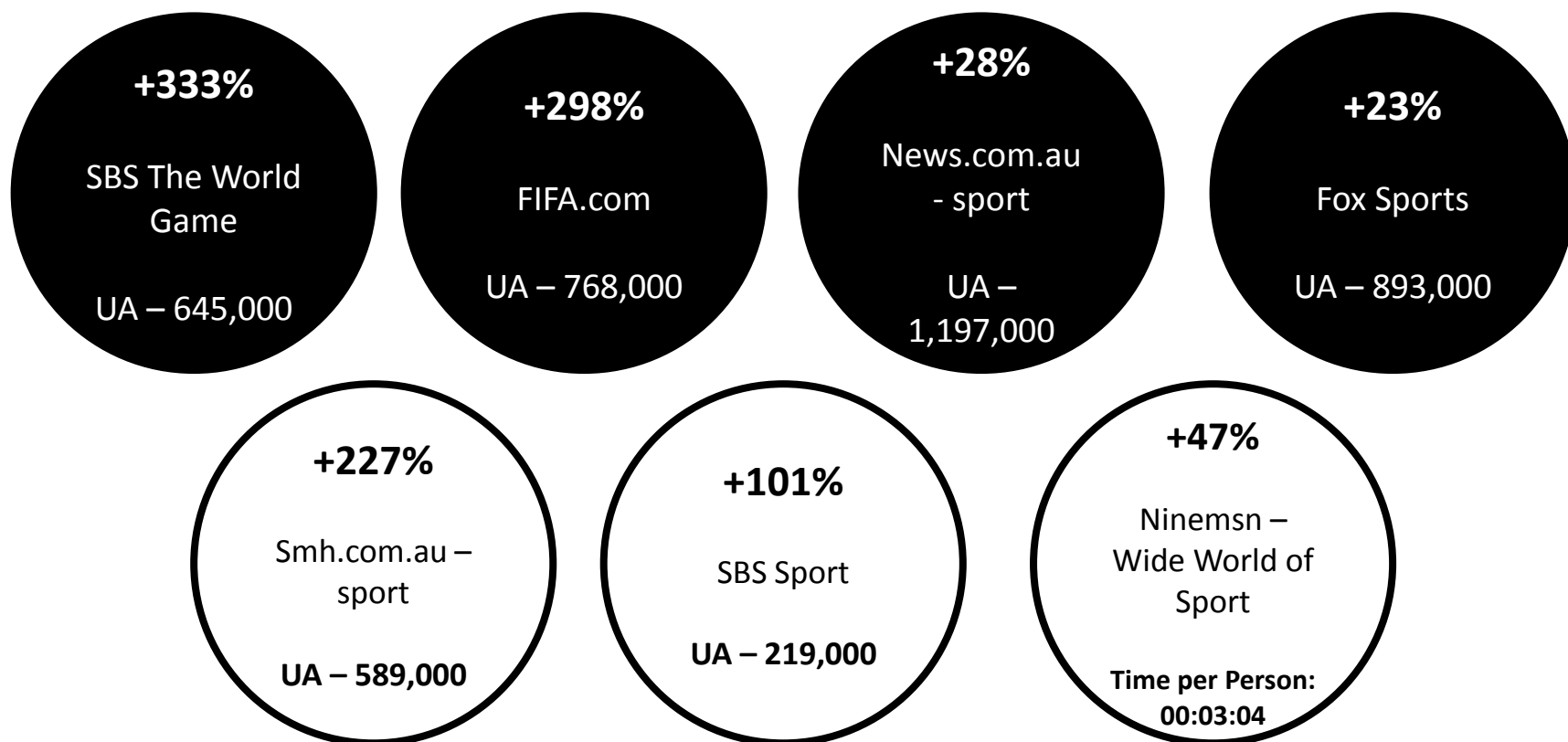
# NIELSEN ONLINE RATINGS – HYBRID / MARKET INTELLIGENCE SPORTS



## SPORTS – HIGHLIGHTS - AUDIENCE

Sports websites had impressive growth (month vs. month) in terms of audience traffic; highlights include:

- **SBS The World Game** increased surfing unique audience by **333 percent** followed by **FIFA.com** up **298 percent**. **News.com.au-sport** and **Fox Sports** grew **28 percent** and **23 percent** respectively.
- For streaming, **smh.com.au-sport** increased unique audience by **227 percent** and **SBS Sport** had growth of **101 percent**. **Ninemsn-wide world of sport** also had very strong growth with a **47 percent** increase in engagement (time per person) with site content.

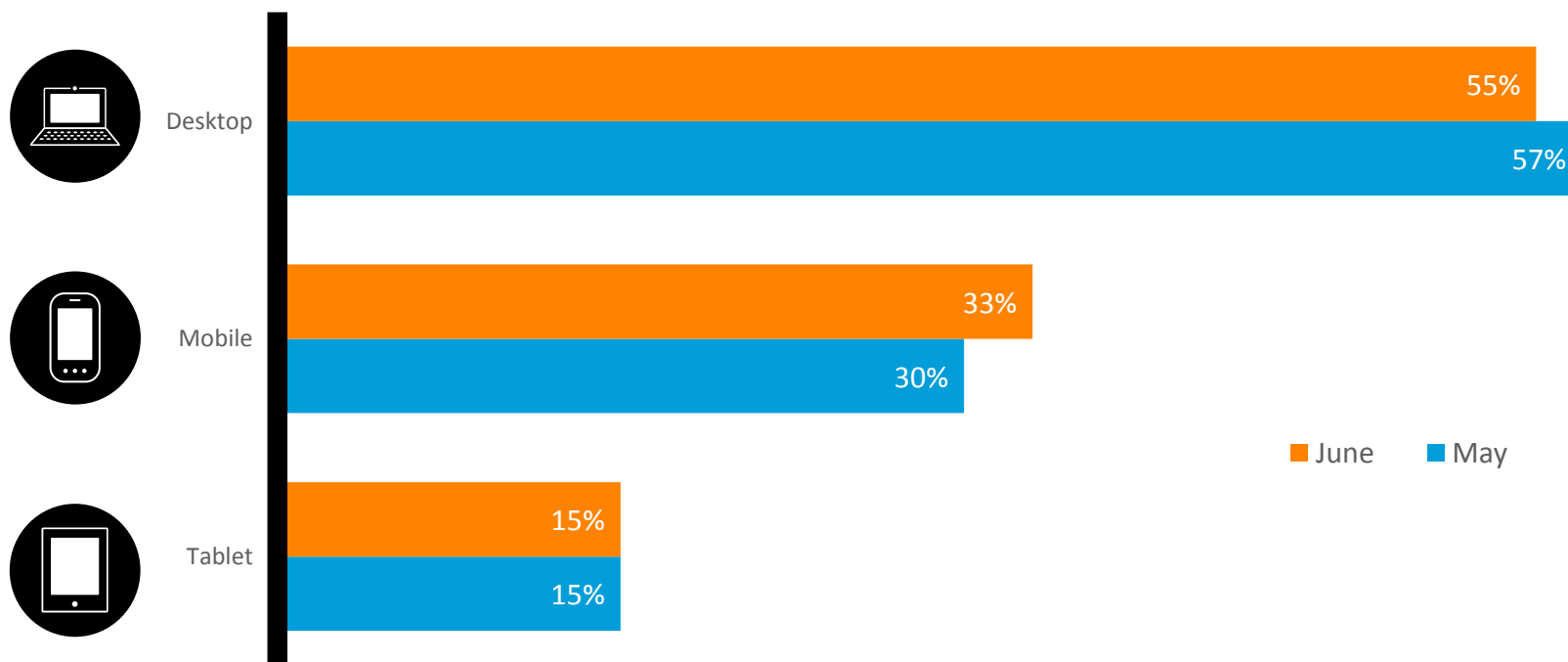




# SPORTS – DEVICE ENGAGEMENT - TRAFFIC

Device engagement within the sports category during June was quite robust; the growth was driven by major events such as the State of Origin, The World Cup and Wimbledon.

**33 percent** of **total online sessions traffic** for the sports category **came from smartphones** – this is a 3 percent increase from last month or a near **5.2 million** increase in online total sessions. **Tablet** also saw a notable **growth of 800,000 total sessions** within the sports category. Together, **48 percent** of total online sessions traffic was from a portable device.



Metrics: Total Sessions (%)

Source: Nielsen Market Intelligence, May & June 2014



# HIGHLIGHTS: JUNE 2014

## NIELSEN ONLINE RATINGS: HYBRID STREAMING

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More than eight in 10 online Australians have purchased in-store after seeing relevant online content.

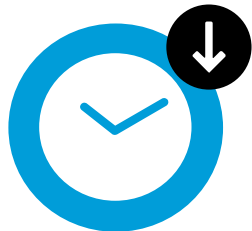
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# HYBRID STREAMING KEY ONLINE STATISTICS

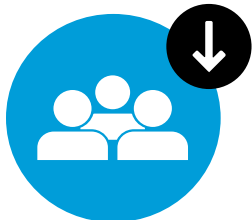
June 2014



**2.9 billion** streams watched.



**6.2 billion** minutes streamed.



**7 hours and 33 minutes** spent streaming per person.



**13,579,000** people were actively streaming online.



Indicates growth or decline based on the previous month

# HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

June 2014

Unique Audience Rank	Brands	Unique Audience (000s)	Total Streams	Time Per Person
1	YouTube	11,560	1,416,443	04:22:00
2	Facebook	5,600	137,519	01:16:33
3	VEVO	3,553	78,471	00:48:22
4	The CollegeHumor Network	2,962	9,415	00:14:20
5	Mi9	2,678	33,378	00:19:04
6	news.com.au	1,685	10,737	00:08:30
7	smh.com.au	1,386	4,846	00:06:15
8	ABC Online Network	1,283	10,301	02:47:48
9	Yahoo!7	1,276	12,206	00:50:57
10	Dailymotion	1,129	20,860	00:39:05

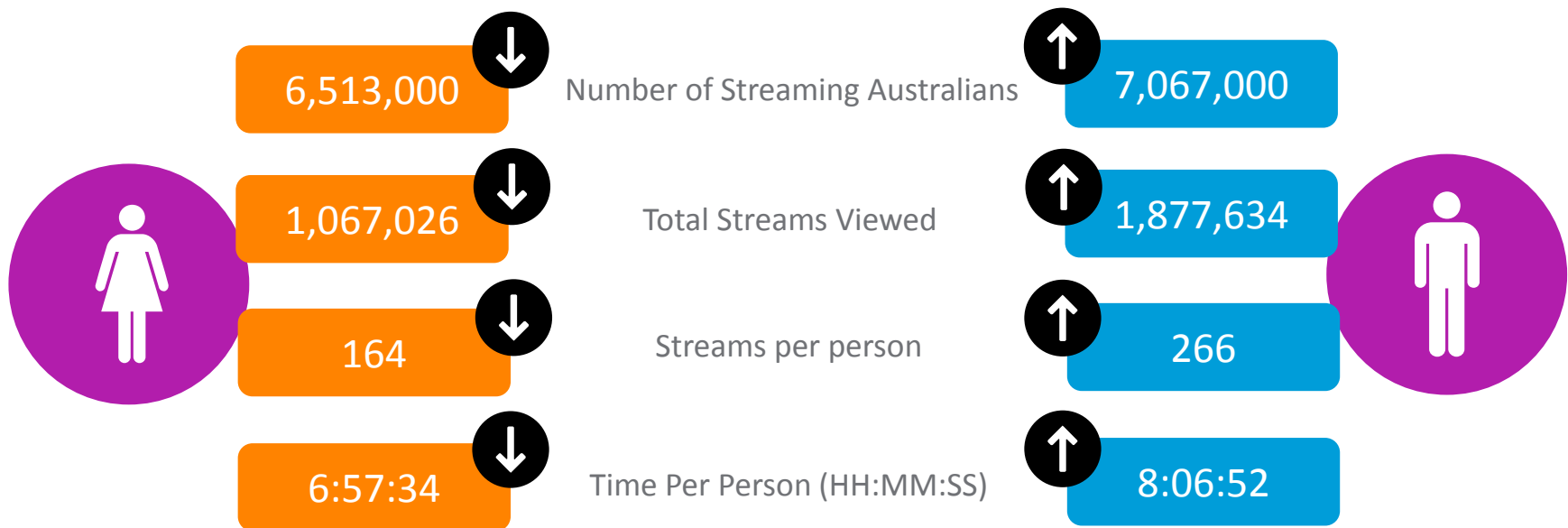
Including web-based applications

Source: Nielsen Online Ratings – Hybrid Streaming, June 2014



# HYBRID STREAMING: DEMOGRAPHIC BREAKDOWN

June 2014



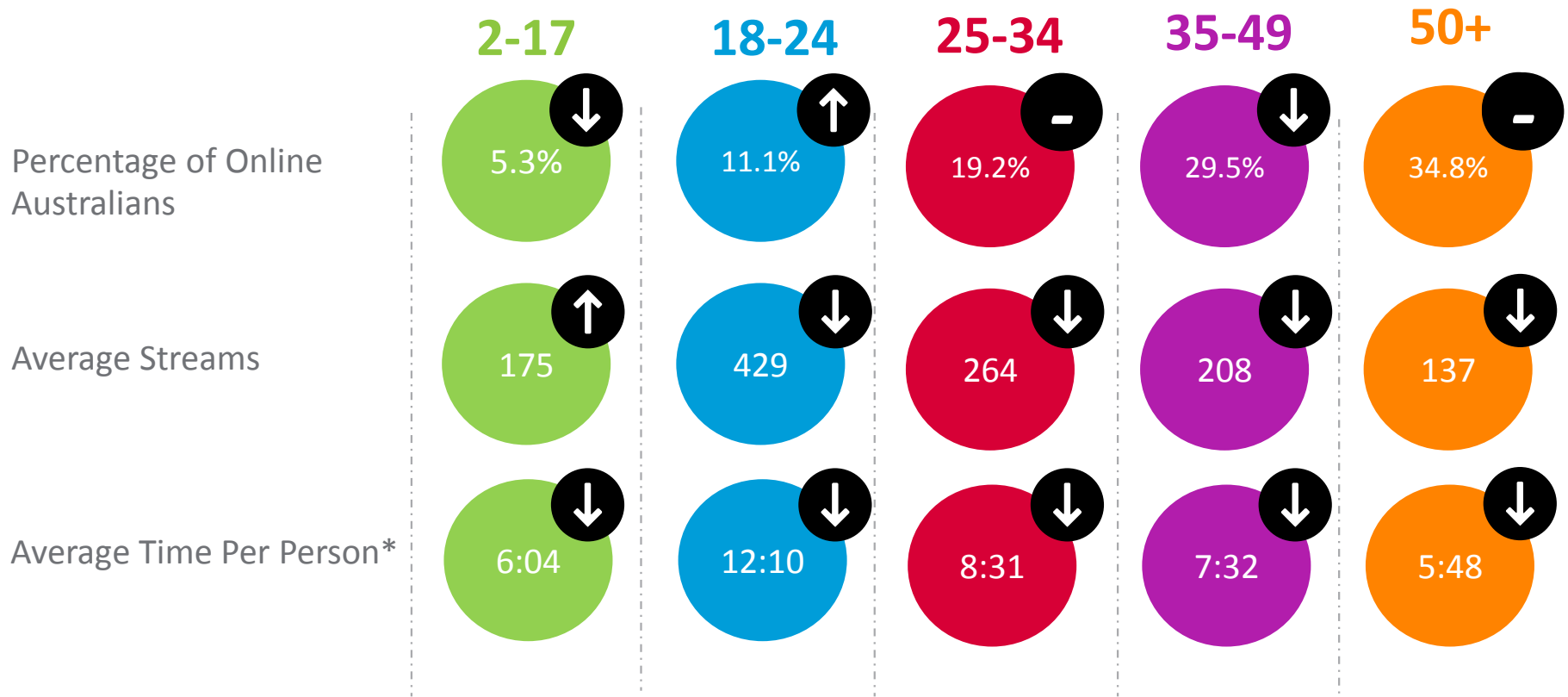
Males were leading the total streams viewed for this month – a jump of 60%, compared to May. Females streamed immensely less – (-19%) less, June vs. May.



Indicates growth or decline based on the previous month

# HYBRID STREAMING: AGE DEMOGRAPHICS ONLINE

June 2014



↑ ↓ Indicates growth or decline based on the previous month

\*HH:MM



# DEVICE COMPARISON UPDATE: JUNE 2014

## NIELSEN MARKET INTELLIGENCE

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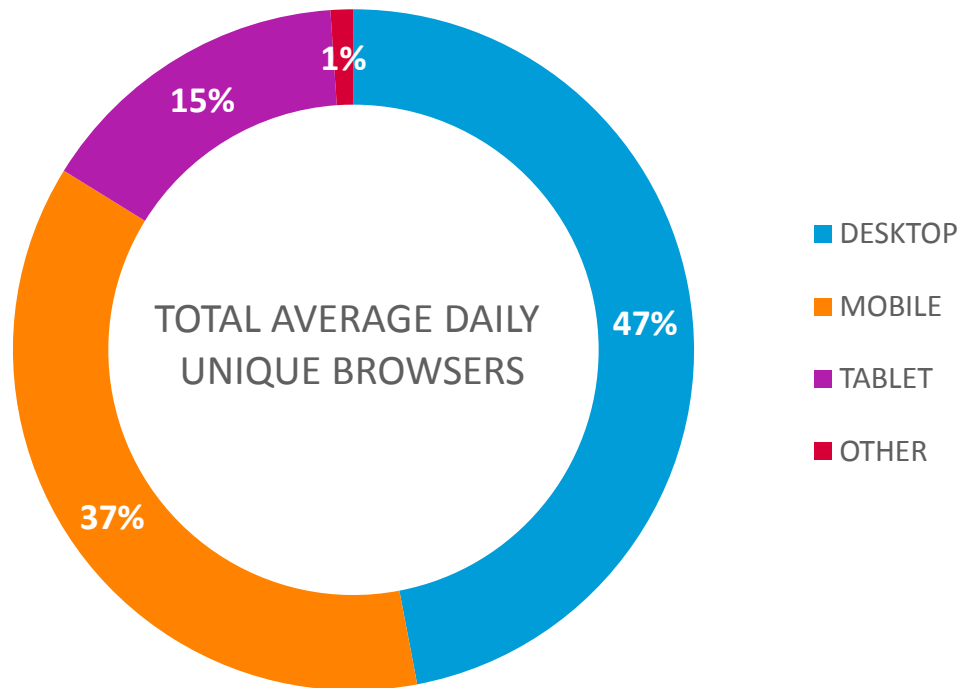
Use of a mobile device such as a smartphone or tablet in-store for research prior to purchase has been adopted by four in 10 online Australians; nine percent on a regular basis.

”

# DEVICE TYPE COMPARISON (EXCLUDING APPLICATIONS)

June 2014 – Market Domain – Domestic Traffic

**53%** of total average daily unique browsers are not from desktop. An increase of **2%** on the previous month.



Desktop slightly decreased (-2%) in average daily unique browser usage.



# NIELSEN ONLINE RATINGS – HYBRID / MARKET INTELLIGENCE MASS MERCHANDISER



## TOP 10 MASS MERCHANDISER SITES – AUDIENCE

Mass Merchandiser sites had noticeable growth within the top 10 sites and as a category as a whole – nearly **9.8 million** or **3 for every 5 online** Australians visited mass merchandiser sites this month.

Month-on-month comparisons:

- 16 of the top 20 sites had growth in **Unique Audience**.
- **Kmart Australia** had the highest growth in audience of **282,000** – up **29 percent** on last month.
- While out of the top 10, **David Jones** posted an audience growth of **232,000** or **39 percent** to deliver an audience of **828,000** in June.
- **5** of the top 10 sites had audiences spending more time per person on their sites – notably **Coles** and **Big W** where audiences spent **22** and **25 percent** respectively; more time on their sites.

Sites	Unique Audience (000)		Variance Change	Time Per Person (hh:mm:ss)	Sessions Per Person
	May	June	%	June	June
Amazon	3,356	3,384	0.83	00:20:11	3.54
Woolworths	2,403	2,502	4.12	00:18:29	3.08
Coles	2,522	2,254	-10.63	00:22:41	3.24
JB Hi-Fi	1,757	1,826	3.93	00:09:54	2.43
Big W	1,575	1,675	6.35	00:09:48	2.09
Woolworths HomeShop	1,369	1,565	14.32	00:22:22	3.07
Target Australia	1,457	1,521	4.39	00:12:09	2.50
Harvey Norman	1,500	1,465	-2.33	00:07:38	2.03
Kmart Australia	959	1,241	29.41	00:05:33	1.83
Officeworks	1,285	1,233	-4.05	00:41:54	2.10



# MASS MERCHANDISER – GENDER SNAPSHOT - AUDIENCE

A quick snapshot of the gender breakdown within the Mass Merchandiser category.

- **Female Australians** are **leading** in terms of **engagement** on these mass merchandiser shopping sites. They spend **35 percent** more time per person than their Male counterparts.
- Mass Merchandiser sites have gained **male audience traction** – there are **9 percent** more Male Australians going to this category compared to last month.
- **Target Australia** and **Woolworths** HomeShop were sites that saw significant growth in **Australian male audiences** – they had increases of **10 and 13 percent**, respectively; compared to last month.



Unique Audience (000)		Growth	Time Per Person (hh:mm:ss)	Sessions Per Person
May	June	%	June	June
4,471	4,863	9.00	00:47:11	7.32



Unique Audience (000)	Active Reach	Time Per Person (hh:mm:ss)	Sessions Per Person
June	%	June	June
4,891	57.33	01:03:44	7.70



# UPDATES FOR THIS MONTH

# GOOGLE TAG ACCEPTANCE



Beginning **July 1 2014**, Google will accept OCR tags on ads running in select regions.

Areas of Google	Countries	Platform
YouTube	US, Canada, Australia	Desktop
Google Display Network (GDN) – <i>display only ad network</i>	US, Canada, Australia	Desktop
AdX - <i>Google's ad exchange</i>	US, CA, AU, IT, DE, FR, UK, BR	Desktop

- Placements must start on or after July 1, 2014
- Timing for additional countries for YouTube and GDN is TBD
- YouTube TrueView is included
- Doubleclick integration still slated for end of 2014
- Initially desktop only; mobile acceptance TBD

# MOBILE AUDIENCE MEASUREMENT PILOT

TAKING THE FIRST STEPS TO UNDERSTAND MOBILE AUDIENCES IN AUSTRALIA...

**MORE** MONEY TO  
MOBILE  
ADVERTISING

**50%** OF AVERAGE  
DAILY UBS

IN JANUARY 2014, MOBILE + TABLET DEVICES GENERATED...

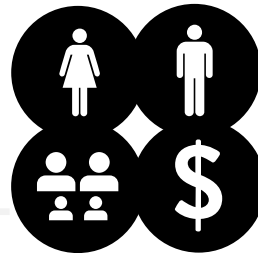


**28%** OF PAGE  
IMPRESSIONS

Source: Nielsen Market  
Intelligence, January 2014

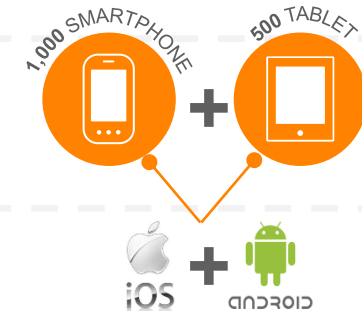
CONSUMPTION VIA  
MOBILE DEVICES IS  
AT A **TIPPING  
POINT**

AGE, GENDER, INCOME  
DEMOGRAPHICS

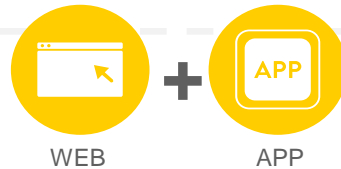


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1,500 PERSON PANEL WILL PROVIDE AUDIENCE DATA ON...



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AUSTRALIA WILL  
PROVIDE UNIQUE  
AUDIENCE INSIGHTS

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This event connects our biggest advertisers, retailers and media houses to share, learn, inspire, engage and create positive outcomes. Over three big days, Consumer 360 Pacific addresses everything from building your audience and improving your products, to boosting sales and maintaining your loyal consumers. After all, we know that results are everything to your business.

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## CONTACT

[careau@nielsen.com](mailto:careau@nielsen.com)

[www.nielsen.com/au/](http://www.nielsen.com/au/)

(02) 8873 7000