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THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

AUGUST 2014

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STATE OF THE ONLINE LANDSCAPE

August 2014

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

In August we deep dive into the categories of:
- Education & Careers with a focus on career development sites.
- Computers & Consumer Electronics – which saw high levels of growth in traffic; this may have been influenced by the anticipation around the new product releases from Samsung, Apple, etc.

The online landscape in August saw Australians spend 37 hours online over 61 sessions; with nearly 32 billion minutes spent online with 32 billion pages viewed.

Also, please note the updates for this month:
1. How to use custom roll ups
2. Nielsen Australian eGeneration Report
3. Southeast Asia Cross Platform series

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.
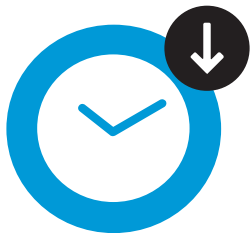
HIGHLIGHTS
NIELSEN ONLINE RATINGS: HYBRID
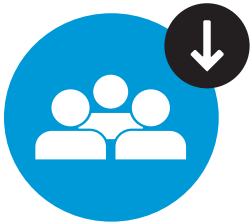
AT A GLANCE: THE ONLINE LANDSCAPE

August 2014

32 billion viewed pages.

39 billion minutes spent.

37 hours spent online, across **61 sessions**.

17,610,000 people were actively surfing online.
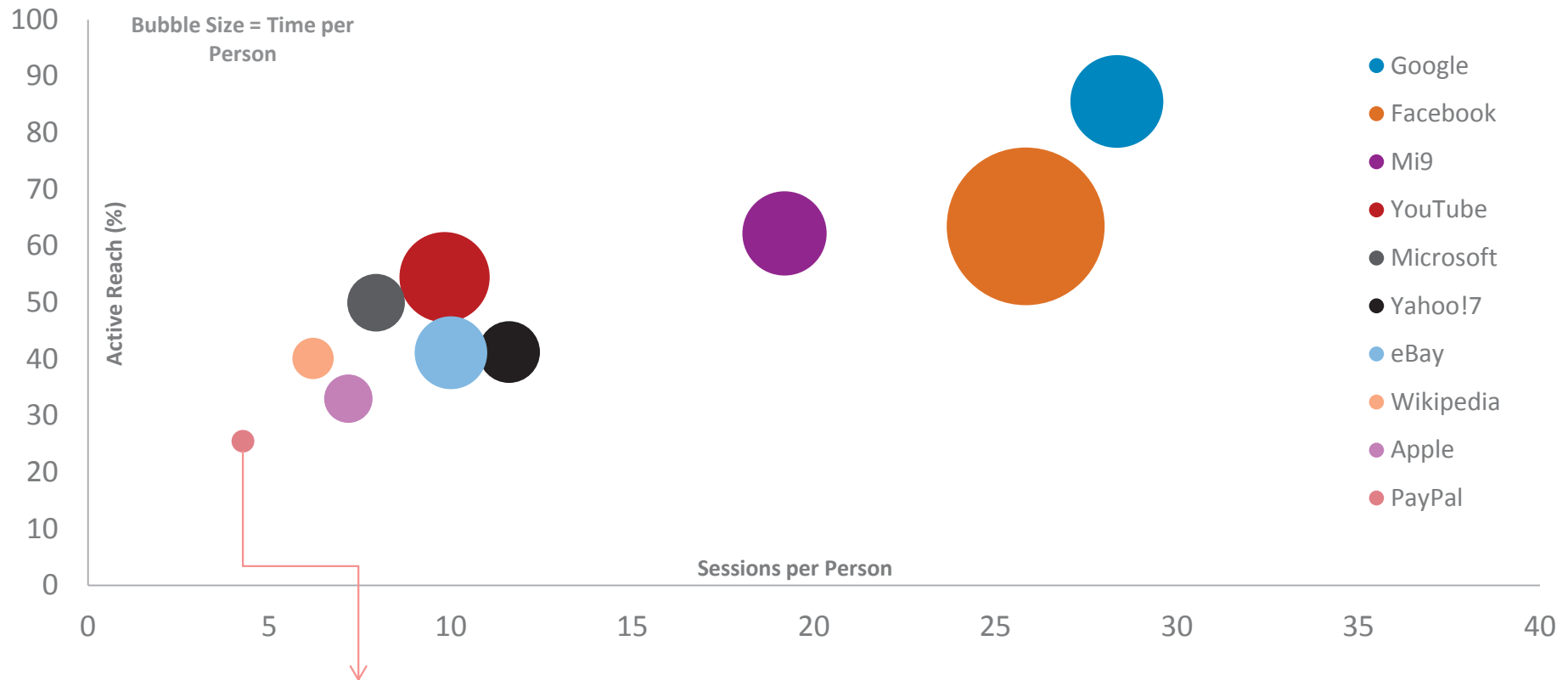
Indicates growth or decline based on the previous month

Source: Nielsen Online Ratings – Hybrid, August 2014

TOP 10 BRANDS AND THEIR ENGAGEMENT

August 2014

Unique Audience Rank	Brands	Unique Audience (000s)	Page Views (000s)	Active Reach (%)	Sessions Per Person	Time Per Person (hh:mm:ss)
1	Google	15,064	3,812,808	85.54	28.34	03:05:41
2	Facebook	11,175	2,851,294	63.46	25.83	08:55:47
3	Mi9	10,954	1,432,098	62.20	19.18	02:32:35
4	YouTube	9,591	789,968	54.47	9.82	02:55:27
5	Microsoft	8,795	44,154	49.94	7.93	01:11:47
6	Yahoo!7	7,261	403,604	41.23	11.60	01:21:55
7	eBay	7,240	970,222	41.11	10.00	01:53:46
8	Wikipedia	7,063	206,934	40.11	6.20	00:36:43
9	Apple	5,811	27,555	33.00	7.71	00:50:11
10	PayPal	4,486	105,281	25.47	4.26	00:11:03

Including web-based applications
Source: Nielsen Online Ratings – Hybrid, August 2014

TOP 10 BRANDS AND THEIR ENGAGEMENT

August 2014

Bubble Size = Time per Person

Active Reach (%)

Sessions per Person

- Google
- Facebook
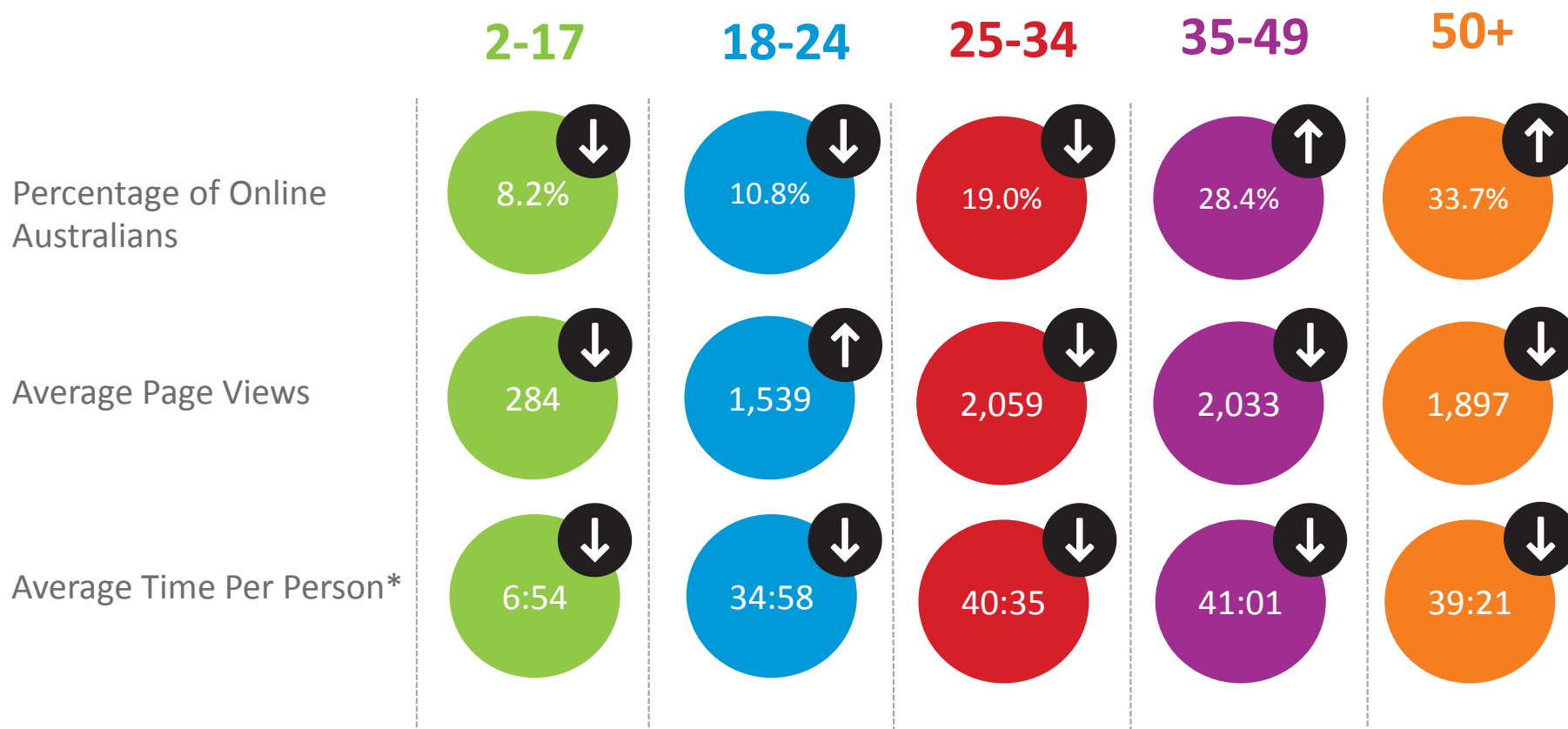- Mi9
- YouTube
- Microsoft
- Yahoo!7
- eBay
- Wikipedia
- Apple
- PayPal

PayPal moved into the top 10 brands in August – they had a 4% increase in unique audience or a jump of 182,000 online Australians.

Source: Nielsen Online Ratings – Hybrid, August 2014

HYBRID SURFING: AGE DEMOGRAPHICS ONLINE
August 2014

	2-17	18-24	25-34	35-49	50+
Percentage of Online Australians	8.2% ↓	10.8% ↓	19.0% ↓	28.4% ↑	33.7% ↑
Average Page Views	284 ↓	1,539 ↑	2,059 ↓	2,033 ↓	1,897 ↓
Average Time Per Person*	6:54 ↓	34:58 ↓	40:35 ↓	41:01 ↓	39:21 ↓

↑ ↓ **Indicates growth or decline based on the previous month**

***HH:MM**

Source: Nielsen Online – Hybrid, August 2014

GENDER BREAKDOWN – ACTIVE UNIVERSE

8,970,000 UA

8,640,000 UA

Female pie chart:
- 50+: 33%
- 35-49: 29%
- 25-34: 19%
- 18-24: 11%
- 2-17: 8%

Male pie chart:
- 50+: 34%
- 35-49: 28%
- 25-34: 19%
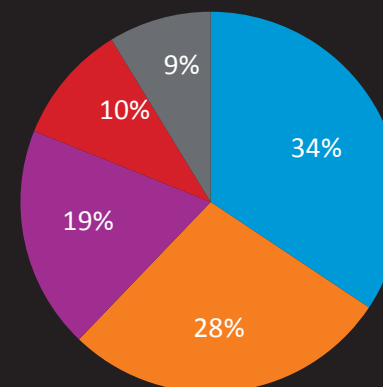- 18-24: 10%
- 2-17: 9%
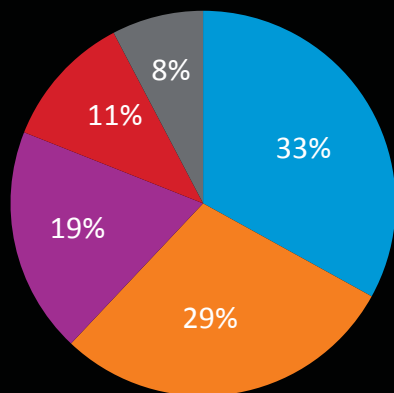
For Females – the slight increase of overall online female Australians was attributed by the 35-49 age demographic – the age group demographic had a bump of an additional 15,000 female individuals.

The increase in the active universe was contributed to the increased online activity from the 50+ age group – +3% or +79,000 male Australians aged 50+.

CATEGORY SPOTLIGHT:
EDUCATION & CAREERS

TOP 10 EDUCATION & CAREERS SITES – AUDIENCE

8.7 million Unique Audiences surfed Education & Careers sites; this category had a **49 percent reach** amongst the online Australians. Also, Online Australians were more engaged with the Education & Careers category in August. The **Time Per Person** and **Total Minutes** metrics for the total category had increases of **8 percent** and **9 percent**, respectively. Individuals were spending up to **1 hour** and **45 minutes**, **per person** – on the Education and Career category.

Looking within the Top 10 sites:
- Seek, in August lead this category in Unique Audience traffic (1,964,000) and Sessions Per Person (8.79).
- 6 out of 10 sites saw growth in Time Per Person & Sessions Per Person – career development sites such as Seek and Indeed had robust time per person growth; 16 percent and 12 percent, respectively.
- For Sessions Per Person – there was a similar story; Seek and careerone.com.au saw increases of 14 percent and 16 percent.

Sites	Unique Audience (000)	Time Per Person (hh:mm:ss)	Sessions Per Person
	August	August	August
Seek	1,964	01:01:26	8.79
careerone.com.au	900	00:11:14	3.70
Indeed	624	00:34:41	5.38
Monash University	499	01:15:24	7.37
The University of Sydney	476	00:17:30	3.18
JobSeeker	456	00:06:07	2.33
Mathletics	431	01:32:27	5.84
About.com Education	430	00:05:07	1.63
Google Scholar	386	00:14:47	3.32
The University of Melbourne	373	01:09:14	5.21

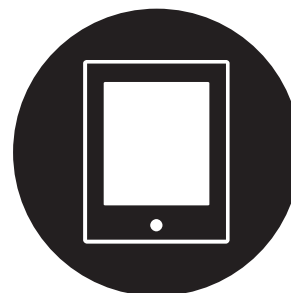Source: Nielsen Online Ratings – Hybrid, July & August 2014

EDUCATION & CAREERS – CONSUMER INSIGHTS

Through Nielsen's Consumer & Media View, we are able to deep dive into consumer insights within the **Education & Career category** and their behaviours in **accessing internet activities**. **There were 4,429,000** individuals in the past month – who accessed the Internet in order to go '**job hunting**'.

Interestingly, of those who are classified as job hunting, there preference of location to access the Internet showed that they're more inclined to job hunt while moving i.e. While commuting/on transport (16%) vs. Internet Cafes (5%).

Furthermore, from Nielsen's Market Intelligence we can see the proportion of traffic **(Average Daily Unique Browsers)** going to certain career development sites:

- Individuals visiting **Seek** via their **portable device**; a higher proportion of them accessed the site on a Mobile (27%) than compared to a Tablet (11%).

- **Careerone.com.au** – Mobile (25%) vs. Tablet (12%).

- **Jobsearch.gov.au** – Mobile (23%) vs. Tablet (9%).

- **MyCareer** – Mobile Phone (37%) vs. Tablet (9%).

Source: Consumer and Media View – 2014 S05 Online Fused

HIGHLIGHTS

NIELSEN ONLINE RATINGS: HYBRID STREAMING

HYBRID STREAMING KEY ONLINE STATISTICS

August 2014

2.8 billion streams watched.

6.2 billion minutes streamed.

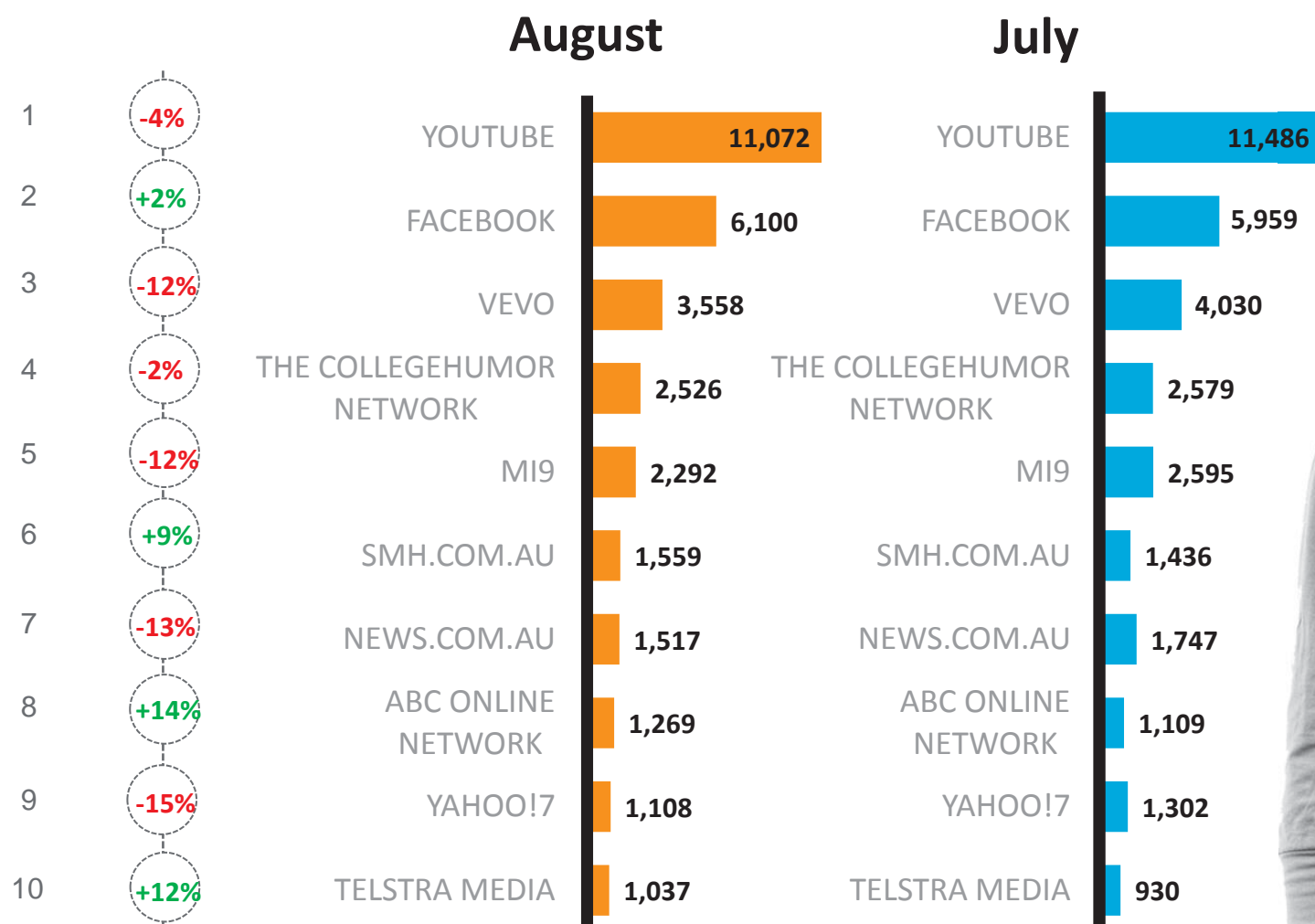**7 hours** and **47 minutes** spent streaming per person.

13,214,000 people were actively streaming online.

⬆⬇ **Indicates growth or decline based on the previous month**

TOP BRANDS COMPARISON - STREAMING

August 2014

Rank	Change	Brand	August	Brand	July
1	-4%	YOUTUBE	11,072	YOUTUBE	11,486
2	+2%	FACEBOOK	6,100	FACEBOOK	5,959
3	-12%	VEVO	3,558	VEVO	4,030
4	-2%	THE COLLEGEHUMOR NETWORK	2,526	THE COLLEGEHUMOR NETWORK	2,579
5	-12%	MI9	2,292	MI9	2,595
6	+9%	SMH.COM.AU	1,559	SMH.COM.AU	1,436
7	-13%	NEWS.COM.AU	1,517	NEWS.COM.AU	1,747
8	+14%	ABC ONLINE NETWORK	1,269	ABC ONLINE NETWORK	1,109
9	-15%	YAHOO!7	1,108	YAHOO!7	1,302
10	+12%	TELSTRA MEDIA	1,037	TELSTRA MEDIA	930

HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

August 2014

Unique Audience Rank	Brand	Unique Audience (000s)	Total Streams	Time Per Person (hh:mm:ss)
1	YouTube	11,072	1,477,821	04:38:03
2	Facebook	6,100	167,084	01:31:36
3	VEVO	3,558	98,860	01:08:33
4	The CollegeHumor Network	2,526	8,692	00:14:07
5	Mi9	2,292	31,443	00:20:27
6	smh.com.au	1,559	4,887	00:05:31
7	news.com.au	1,517	10,199	00:10:10
8	ABC Online Network	1,269	8,990	02:35:18
9	Yahoo!7	1,108	10,996	00:45:57
10	Telstra Media	1,037	8,480	00:35:39

Including web-based applications

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GENDER BREAKDOWN – HYBRID STREAMING

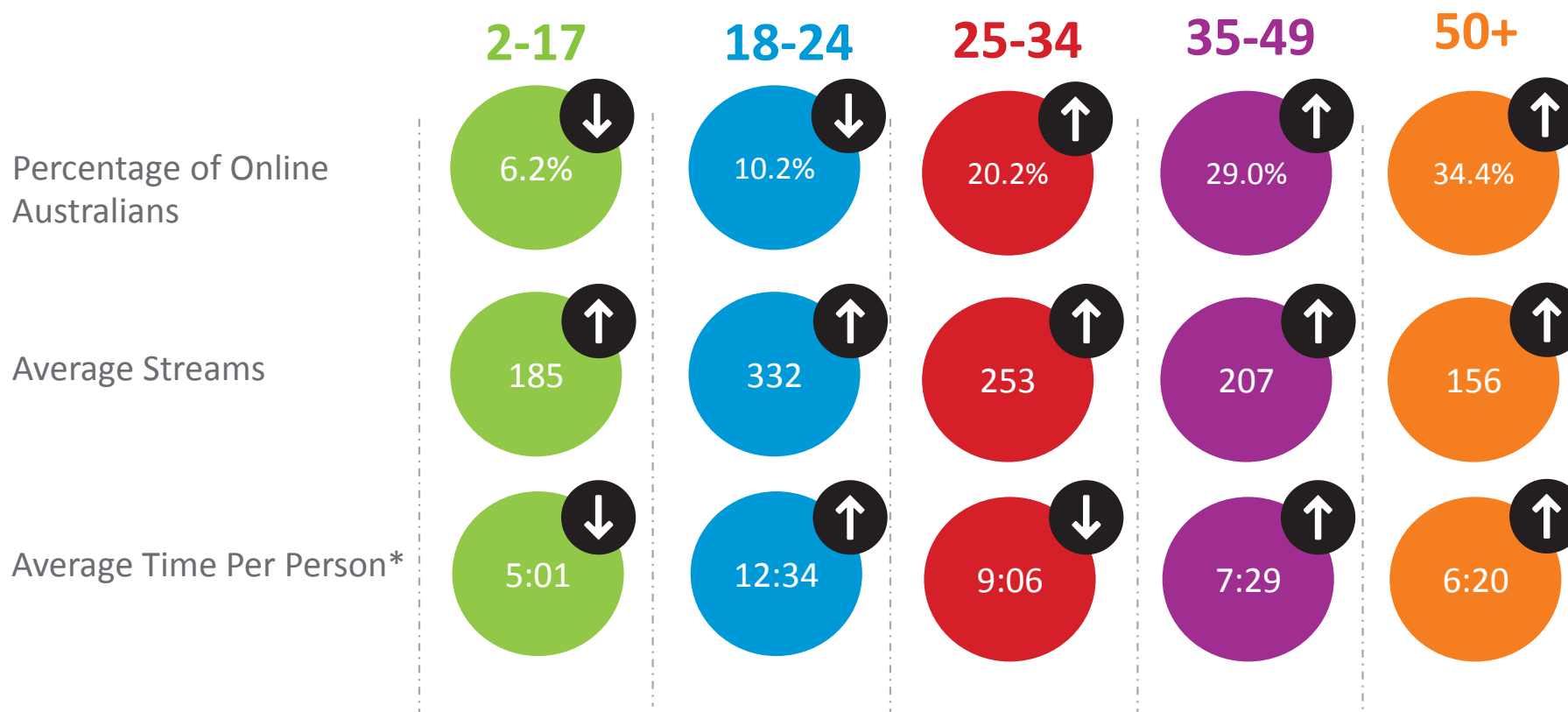|	Number of Streaming Australians	
6,679,000 ↓		↓ 6,534,000
1,091,653 ↓	Total Streams Viewed (000s)	↑ 1,687,777
163 ↓	Streams per person	↑ 258
7:00:33 ↓	Time Per Person (HH:MM:SS)	↑ 8:34:19

As an overall – Australians were streaming less in August. However – looking into the specifics; the frequency of streaming grew for males. Male Australians had double digit growth for Total Streams and Streams Per Person; 13% and 10%, respectively.

HYBRID STREAMING: AGE DEMOGRAPHICS ONLINE

August 2014

	2-17	18-24	25-34	35-49	50+
Percentage of Online Australians	6.2% ↓	10.2% ↓	20.2% ↑	29.0% ↑	34.4% ↑
Average Streams	185 ↑	332 ↑	253 ↑	207 ↑	156 ↑
Average Time Per Person*	5:01 ↓	12:34 ↑	9:06 ↓	7:29 ↑	6:20 ↑

↑ ↓ **Indicates growth or decline based on the previous month**

*HH:MM

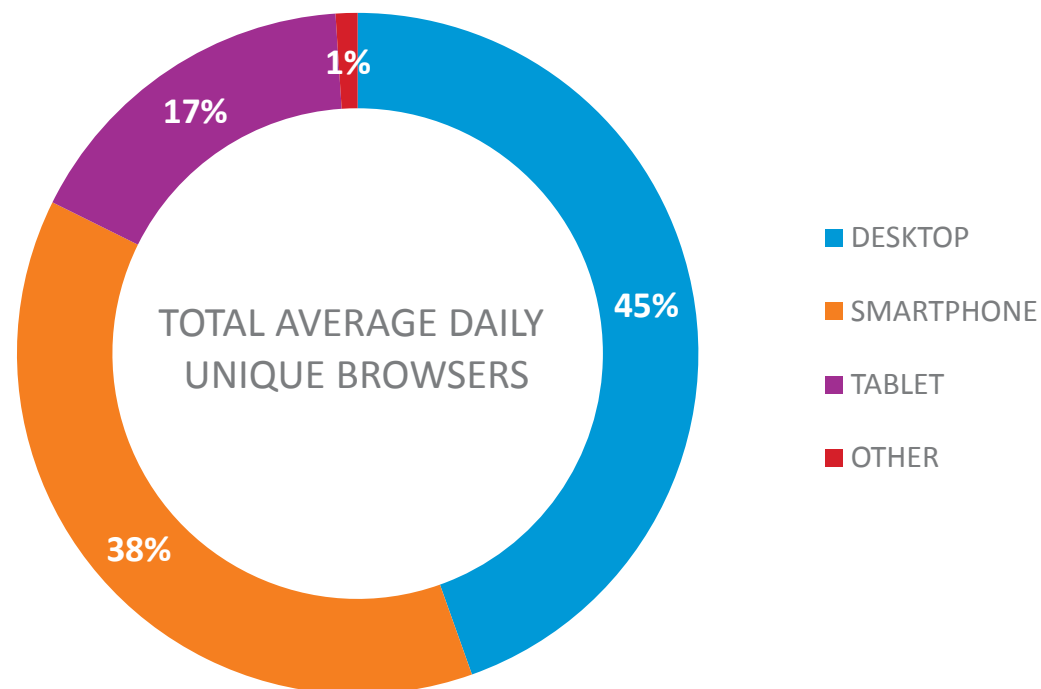Source: Nielsen Online – Hybrid, August 2014

DEVICE HIGHLIGHTS

NIELSEN ONLINE RATINGS: MARKET INTELLIGENCE

DEVICE TYPE COMPARISON (EXCLUDING APPLICATIONS)

August 2014 – Market Domain – Domestic
Traffic

56% of Total
Average Daily Unique
Browsers came from
portable devices.

TOTAL AVERAGE DAILY
UNIQUE BROWSERS

1%

17%

45%

38%

- DESKTOP
- SMARTPHONE
- TABLET
- OTHER

Mobile and Tablet saw increases of 1% and 2% in total average daily unique browsers. August had a month of higher domestic traffic coming from portable devices, compared to July.

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

CATEGORY SPOTLIGHT:
COMPUTERS & CONSUMER
ELECTRONICS

COMPUTERS & CONSUMER ELECTRONICS OVERVIEW - AUDIENCE

In August, the Computers & Consumer Electronics category brought in 14.3 million online Australians or 3 out of 4 Australians surfed computers and consumer electronics related content.

Compared to July, there was an additional 183,000 individuals browsing this content – 57,000 more females and a significant lift in male audiences; +125,000.
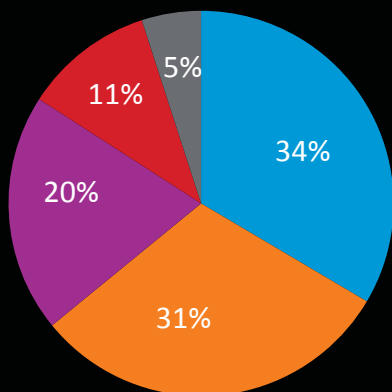
Sites	Unique Audience (000)	Time Per Person	Sessions Per Person	Page Views (000)	Active Reach (%)
	August				
Microsoft	8,795	01:11:47	7.93	44,154	49.94
Windows Media Player	6,357	01:23:40	7.39	N/A	36.10
Apple	5,811	00:50:11	7.71	27,555	33.00
Adobe	3,436	00:06:51	2.45	12,785	19.51
Dropbox	3,395	00:06:48	9.59	18,474	19.28
Apple Product Info & Support	2,376	00:07:51	2.64	18,798	13.49
Videolan	2,357	04:17:53	14.21	389	13.39
µTorrent	2,253	01:03:41	21.05	384	12.79
Whirlpool.net.au	2,249	00:16:29	4.00	54,369	12.77
Microsoft Windows	2,118	00:05:04	2.13	7,855	12.03

Source: Nielsen Online Ratings – Hybrid, August 2014

GENDER BREAKDOWN – COMPUTERS & CONSUMER ELECTRONICS

7,182,000 UA

7,127,000 UA

Female pie chart legend:
- 50+
- 35-49
- 25-34
- 18-24
- 2-17

Female pie chart values: 34%, 31%, 20%, 11%, 5%

Male pie chart legend:
- 50+
- 35-49
- 25-34
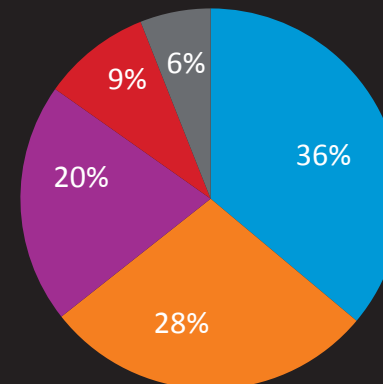- 18-24
- 2-17

Male pie chart values: 36%, 28%, 20%, 9%, 6%

18-24 year olds (Females and Males) were relatively equal in terms of Sessions Per Person – but there were 19% more Female Australians surfing content. Also, **18-24 year old females** were spending **15% more time per person** than male Australians in the same age bracket.

Males aged 35-49 spend **95%** more **Time Per Person** and **50%** more **Sessions Per Person** compared to their female counterparts; surfing Computers & Consumer Electronics content.

TOP 15 COMPUTERS & CONSUMER ELECTRONICS SITES - TRAFFIC

Snapshot of the top 15 local ad supported content sites from **Market Intelligence.** In terms of **Average Daily Unique Browsers**; all 15 sites saw high levels of growth. Especially the technology subdomains of News Sites – such as **News.com.au – Technology, The Guardian – Technology, The Age – Technology** which had very notable increases of **133 percent, 126 percent, and 111 percent**, respectively.

The anticipation of the new product releases/updates from Samsung and Apple probably played a major influence on these increases of traffic towards computers and consumer electronic content.

Sites	Average Daily Unique Browsers	Total Sessions	Page Impressions
	August		
News.com.au - Technology	137,063	5,004,006	6,993,294
CNET	93,749	3,157,518	6,752,941
Smh.com.au – Technology	65,352	2,168,168	2,667,203
Gizmodo	64,255	2,458,243	5,726,997
Lifehacker	56,197	2,006,661	3,671,484
The Age – Technology	31,450	1,045,064	1,289,880
TechRadar	21,574	712,575	1,436,373
ZDNet	13,501	457,936	681,608
The Guardian – Technology	12,063	392,592	487,801
Overclockers.com.au	11,963	614,068	4,287,325
TechRepublic	9,262	304,166	427,353
PCMag	5,725	185,366	430,851
Herald Sun - Technology	5,486	178,089	210,203
Brisbanetimes.com.au – Technology	5,171	173,593	214,859
The Canberra Times - Technology	3,668	122,507	149,938

Source: Nielsen Market Intelligence , July & August 2014

PRODUCT UPDATES FOR THIS MONTH:

NIELSEN – USING CUSTOM ROLL UPS

Custom rollups are used by publishers for two reasons:

1. To combine multiple sites and sections across any category to create a de-duplicated number. This is often required for Ad Network reporting or for publisher sales teams to aggregate content in the way they sell it.

Example: MCN
MCN wanted to regularly report on a de-duplicated figure for all their entertainment sites. This custom rollup is called MCN-Entertainment. MCN have also made custom rollups for their lifestyle sites, music and youth sites as well as their news sites. This makes it quicker and easier for MCN to run reports each month.

2. A site may not fit into Nielsen's categorisation or hierarchy rules so a Custom Rollup is required to appropriately report the site.

Example: The West Australian
The West Australian is a sub-domain of the Yahoo!7 News site. This limits their ability to be an individual brand or channel listed in the News & Information category amongst their competitors. A custom rollup was created by The West Australian to accurately show their site's metrics to the market.

Things to remember when using Custom Rollups:
Categorisation: Custom rollups do not automatically appear when running category reports. You need to run them separately out of the search functionality.

State-based data: Custom rollups do appear in Nielsen's state-based reports located at the bottom of the Nielsen Answers homepage after you login.

URL Report: Custom rollups have a report showing all the URLS which contribute to each. This is also located at the bottom of the Nielsen Answers homepage.

If you ever have any questions about your custom rollups or those of a competitor, please reach out to your Nielsen representative.

IT'S CHILD'S PLAY! TODAY'S CONNECTED KIDS AND TEENS

Australian eGeneration Report

Australian households with kids and teens have the highest number of connected devices in the home.

Three-in-five (60%) households with primary school age children own a tablet, and half have an internet connected TV in the home.

With penetration growing every year, digital platforms are increasingly becoming an ideal way to talk to and reach Australians kids and teens. How marketers and brands connect, educate and engage this consumer now, is vital for their future.

Want to know more? Reach out to your Nielsen account manager if you are interested in more information about how you can be involved with this report.

There is also a **special discounted rate for clients** subscribing to the report in **September**!

SOUTH ASIA CROSS PLATFORM SERIES

JUST PUBLISHED: SOUTH ASIA CROSS PLATFORM SERIES

FOR MORE INFORMATION CONTACT YOUR LOCAL NIELSEN REPRESENTATIVE OR NANCY JAFFE DIRECTOR, SOUTHEAST ASIA CROSS-PLATFORM AUDIENCE MEASUREMENT NANCY.JAFFE@NIELSEN.COM

Prime time is now 24 hours. As device penetration grows and content reaches the Southeast Asian consumer in numerous ways, agencies, broadcasters and marketers face a dilemma: **how do I take advantage of new ways to reach my audience?**

Singapore

Malaysia

Vietnam

Thailand

Indonesia

Philippines

India

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AN UNCOMMON SENSE OF THE CONSUMER™

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