



nielsen

# THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

SEPTEMBER 2014



# STATE OF THE ONLINE LANDSCAPE

September 2014

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

In this month's edition we investigate the following categories:

- Multi-category commerce with a focus on mass merchandiser sites.
- Entertainment – online games.

The online landscape in September saw Australians spend 37 hours online over 64 sessions; with nearly 39 billion minutes spent online with 30 billion pages viewed.

Also, please note the updates for this month:

1. Telstra smartphone and tablet index 2014.
2. Australian eGeneration study – confirmed and underway.
3. 2015 Australian Connected Consumers Report – yes, it's that time of year when we take pre-subscriptions and start designing the 2015 report.
4. Online Campaign Ratings.

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 dark sphere with a grid of thin, colorful lines (red, green, blue, yellow) that wrap around it. Several colored dots (yellow, green, purple, red) are placed on the sphere's surface, with thin lines connecting some of them, suggesting a network or data points.

# HIGHLIGHTS

## NIELSEN ONLINE RATINGS: HYBRID

# AT A GLANCE: THE ONLINE LANDSCAPE

September 2014



**30 billion** viewed pages.



**39 billion** minutes spent.



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



**17,653,000 people** were actively surfing online.

↑ ↓ Indicates growth or decline based on the previous month



# TOP 10 BRANDS AND THEIR ENGAGEMENT

September 2014

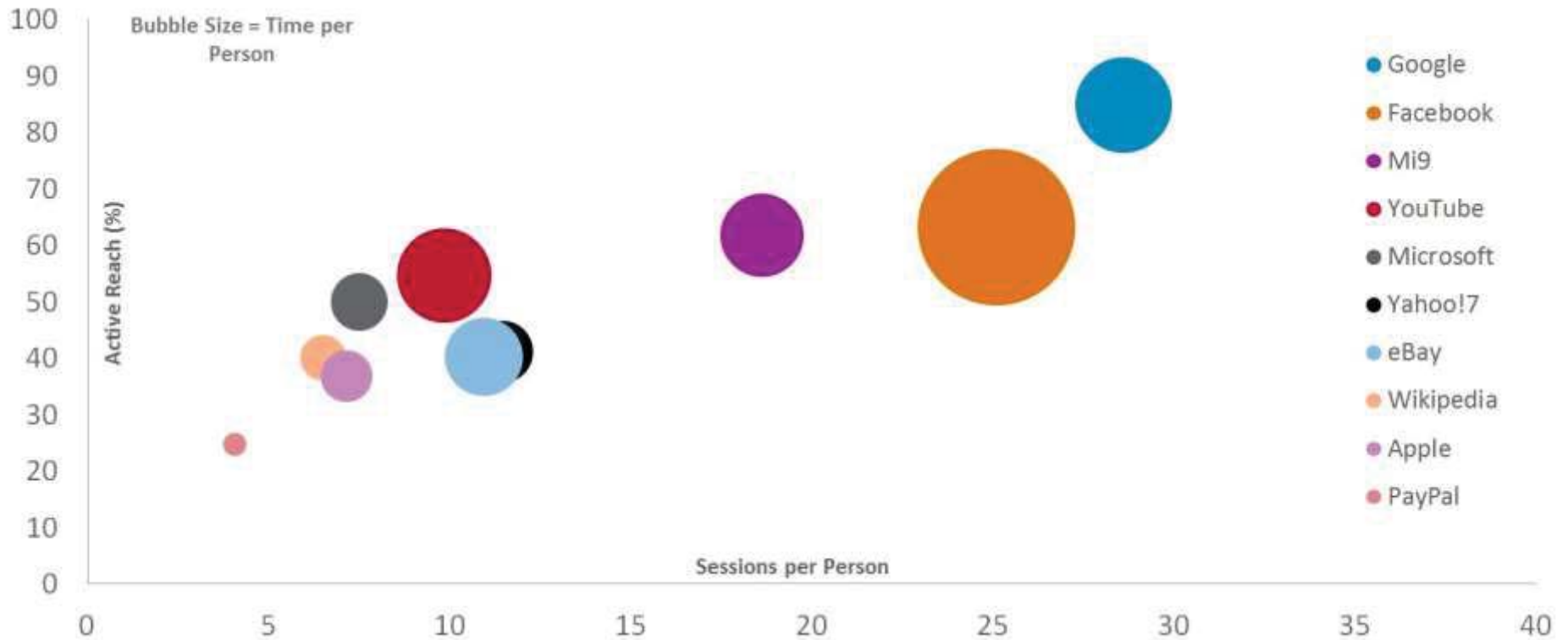
Unique Audience Rank	Brands	Unique Audience (000s)	Page Views (000s)	Active Reach (%)	Sessions Per Person	Time Per Person (hh:mm:ss)
1	Google	14,963	3,775,887	84.76	28.59	03:08:47
2	Facebook	11,149	2,483,389	63.15	25.08	08:25:34
3	Mi9	10,909	1,196,000	61.79	18.62	02:21:55
4	YouTube	9,639	823,885	54.60	9.84	03:04:16
5	Microsoft	8,810	42,492	49.91	7.49	01:07:35
6	Yahoo!7	7,257	361,937	41.11	11.46	01:17:00
7	eBay	7,081	1,007,159	40.11	10.94	02:04:50
8	Wikipedia	7,060	201,078	39.99	6.49	00:42:50
9	Apple	6,490	39,306	36.76	7.14	00:53:17
10	PayPal	4,362	92,738	24.71	4.06	00:10:44

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, September 2014

# TOP 10 BRANDS AND THEIR ENGAGEMENT

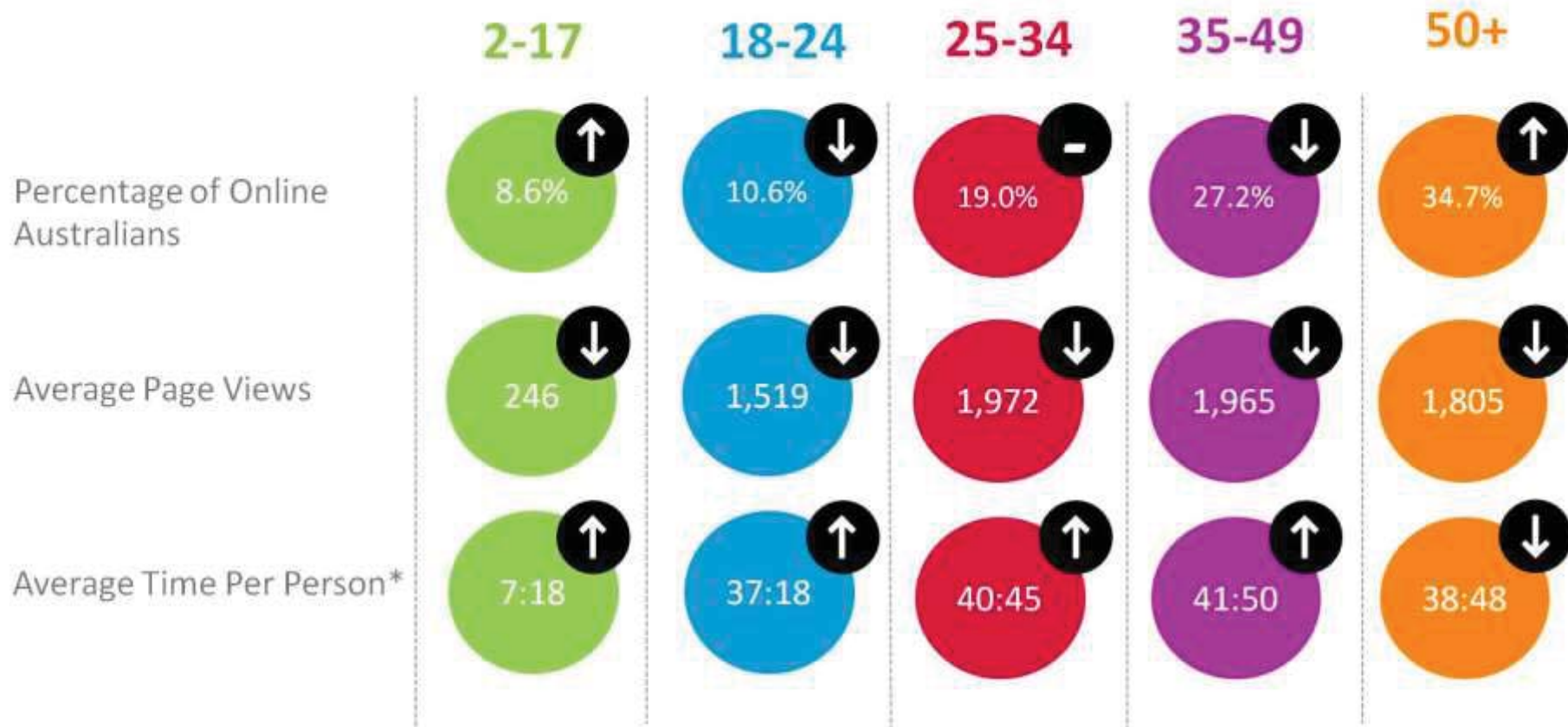
September 2014



Apple and eBay both had double digit growth – Apple saw a 12% increase in Unique Audience while eBay had a 10% jump in Time Per Person, compared to August. The anticipation of the new product releases by Apple contributed to this burst in audience traffic.

## HYBRID SURFING: AGE DEMOGRAPHICS ONLINE

The 17.6 million active online audience in Australia during September 2014 can be broken down as follows:



↑ ↓ Indicates growth or decline based on the previous month

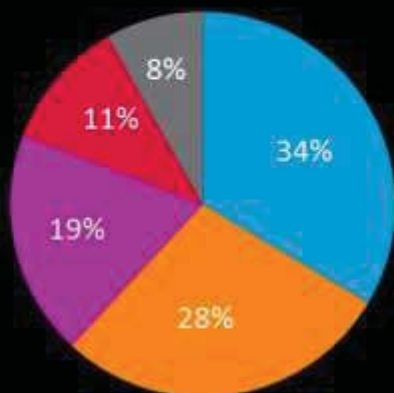
\*HH:MM



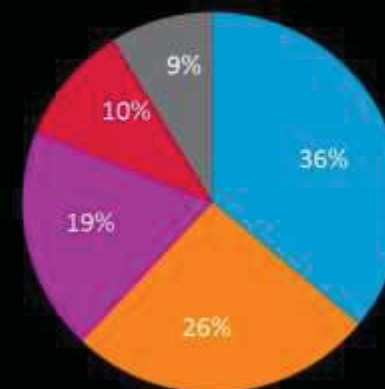
## GENDER BREAKDOWN – ACTIVE UNIVERSE



9,099,000 UA



8,554,000 UA



There was an uplift in the number of 2-17 year olds who were online during September:

- The increase was greatest among young females aged 2-17 (Unique Audience was up 8% compared to August).
- And while there was a slight decline in the number of males online at an overall level during September, among young males (2-17) there was a slight increase in audience; +2%.





# HIGHLIGHTS

## NIELSEN ONLINE RATINGS: HYBRID STREAMING

# HYBRID STREAMING KEY ONLINE STATISTICS

September 2014



**2.4 billion** streams watched.



**5.3 billion** minutes streamed.



**6 hours and 44 minutes** spent streaming per person.



**13,332,000** people were actively streaming online.

↑ ↓ Indicates growth or decline based on the previous month

# HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

September 2014

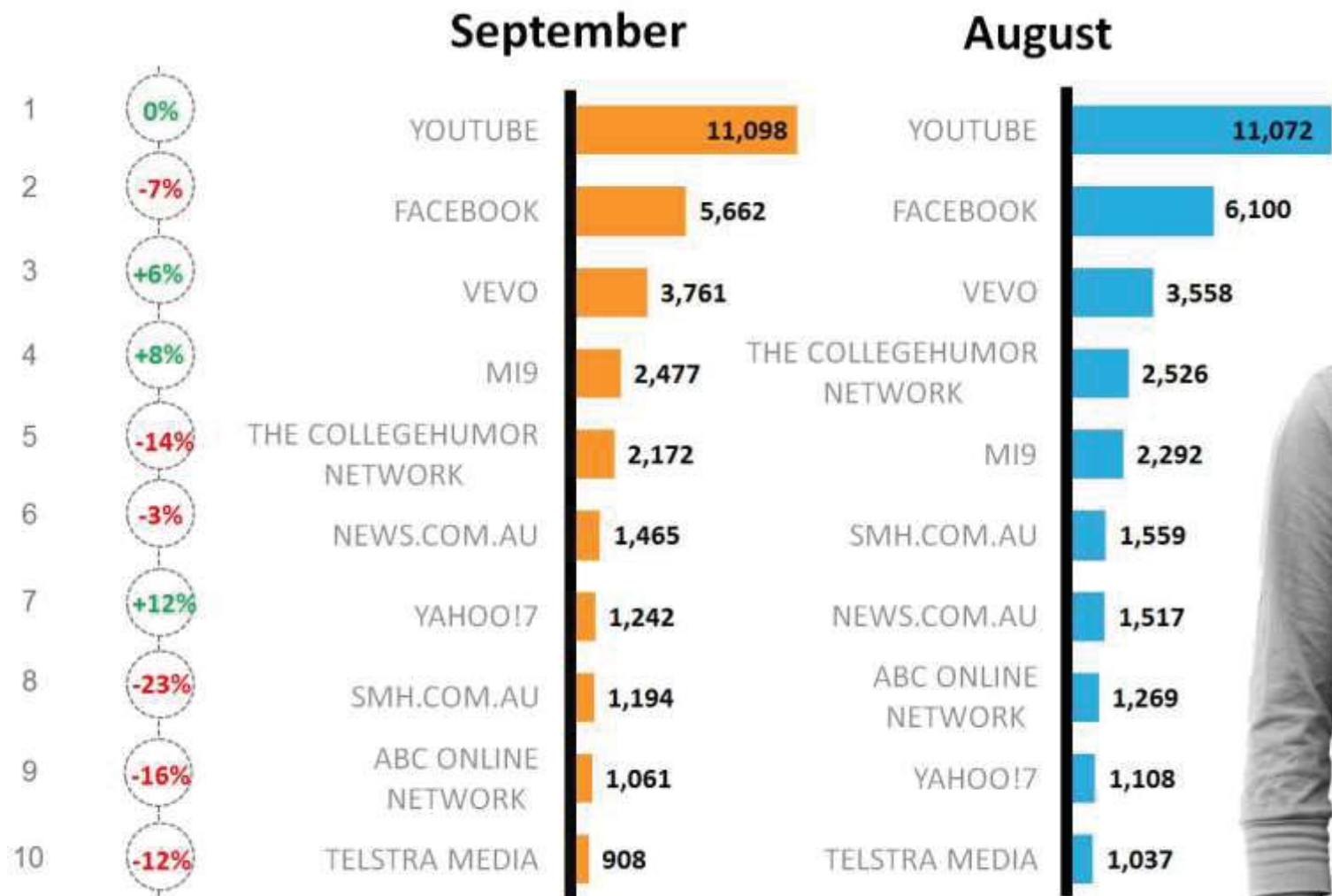
Unique Audience Rank	Brand	Unique Audience (000s)	Total Streams	Time Per Person (hh:mm:ss)
1	YouTube	11,098	1,402,350	03:50:21
2	Facebook	5,662	124,445	01:14:37
3	VEVO	3,761	87,989	00:46:44
4	Mi9	2,477	35,063	00:27:12
5	The CollegeHumor Network	2,172	7,820	00:11:54
6	News.com.au	1,465	9,366	00:08:56
7	Yahoo!7	1,242	13,194	00:53:27
8	Smh.com.au	1,194	4,543	00:06:05
9	ABC Online Network	1,061	10,317	02:53:57
10	Telstra Media	908	5,894	00:25:41

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, September 2014<sup>11</sup>

# TOP BRANDS COMPARISON – HYBRID STREAMING

September 2014, Unique Audience (000)





## GENDER BREAKDOWN – HYBRID STREAMING



6,787,000



Number of Streaming Australians

6,535,000



953,839



Total Streams Viewed (000s)

1,475,918



141



Streams per person

226



06:16:04



Time Per Person (HH:MM:SS)

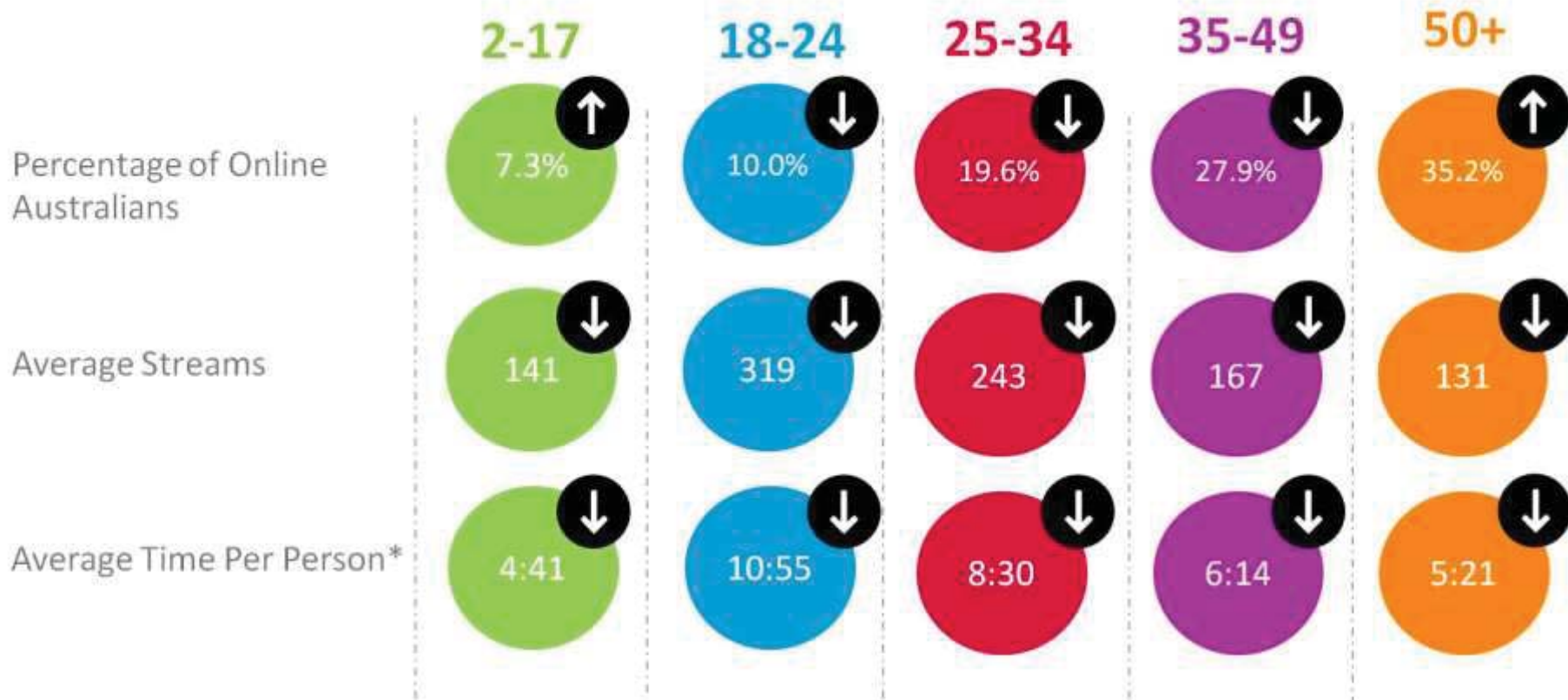
07:11:56



September saw a slight increase in the number of female Australians streaming content (UA grew 2% compared to August). However, among the overall online population – the total streams viewed declined by 13%. The holiday period may have affected this decrease.

# HYBRID STREAMING: AGE DEMOGRAPHICS ONLINE

September 2014



↑ ↓ Indicates growth or decline based on the previous month

\*HH:MM

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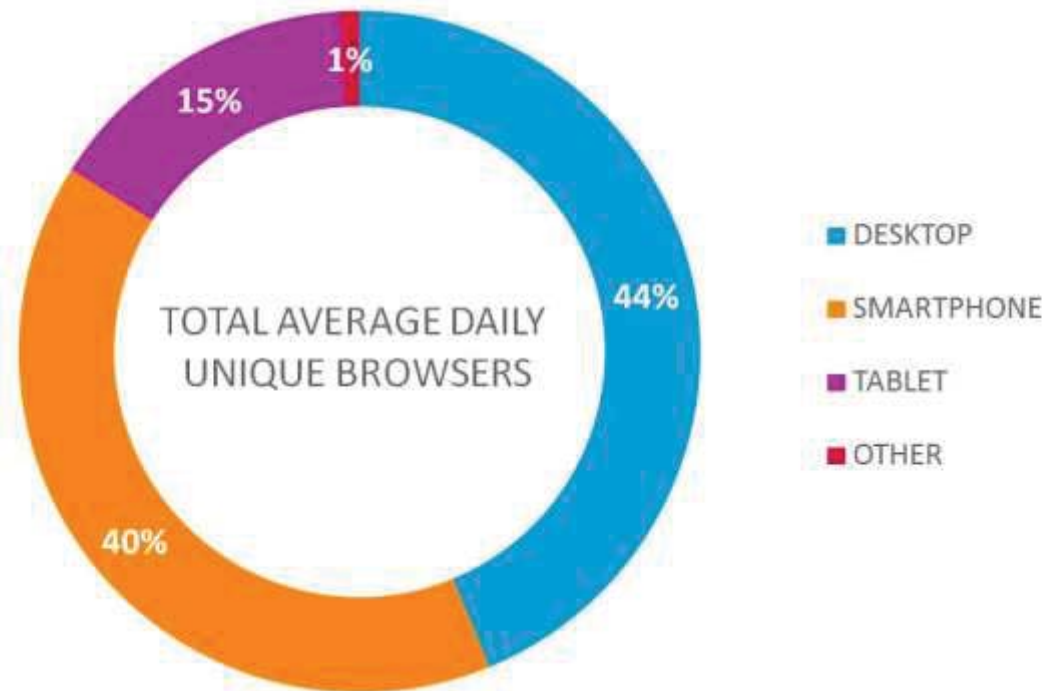
# DEVICE HIGHLIGHTS

NIELSEN ONLINE RATINGS: MARKET  
INTELLIGENCE

## DEVICE TYPE COMPARISON (EXCLUDING APPLICATIONS)

September 2014 – Market Domain – Domestic Traffic

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



Smartphone saw growth of 2% as a proportionate percentage of total Average Daily Unique Browsers; while desktop/laptop declined slightly (- 1%).





# DEVICE HIGHLIGHTS

## ESTABLISHMENT SURVEY RESULTS

# ESTABLISHMENT SURVEY

OCTOBER 2014



The Nielsen Establishment Survey helps form the basis for how Nielsen construct and measure online media consumption in Australia.

The Establishment Survey provides a quarterly perspective on the shifts in the Australian consumer's media behaviour. However, this survey will also offer snap shots into topics such as mobile phone ownership, frequency of internet access via smart phones, feature phones, tablets and desktops.

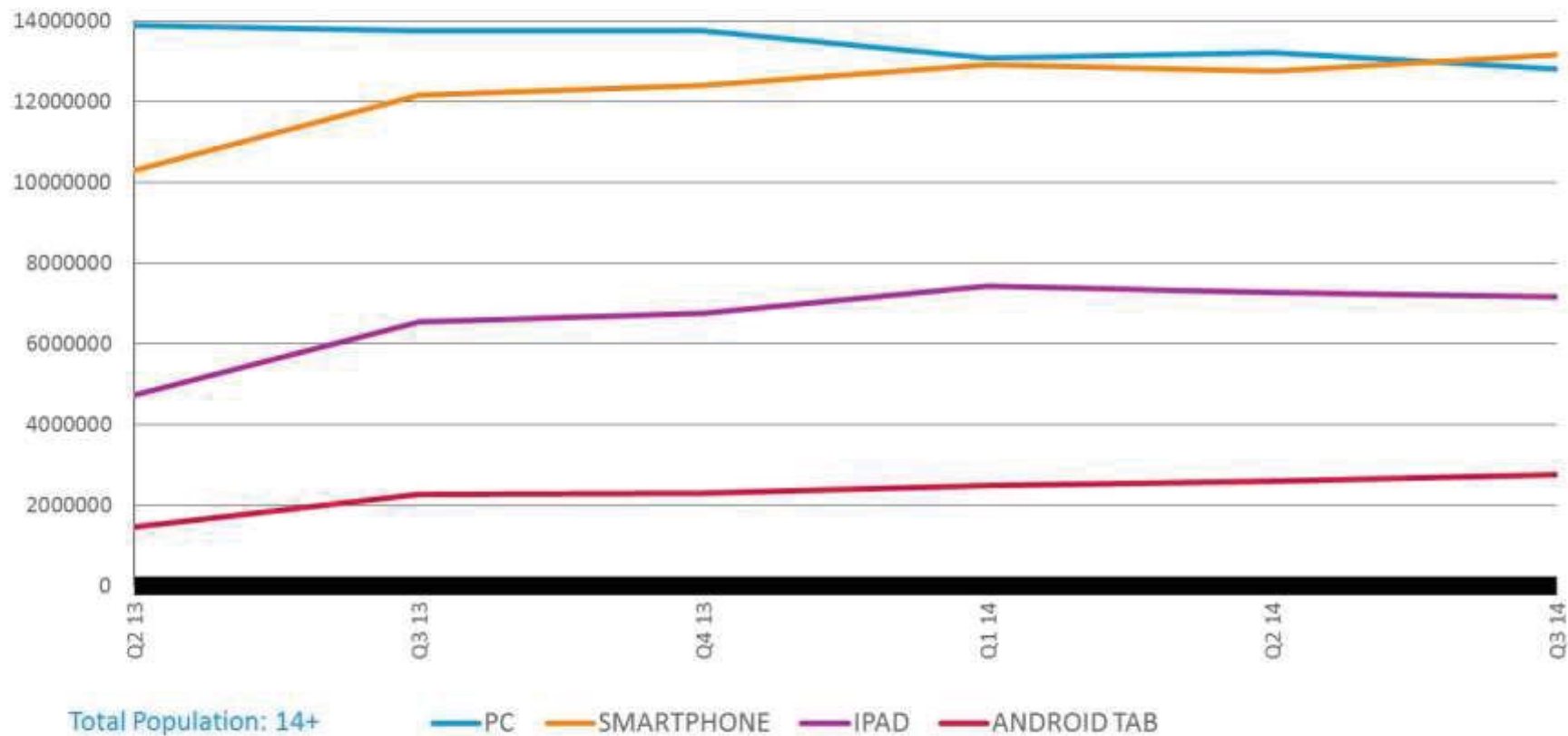
**Feature Phone** – Devices with no touchscreen or QWERTY keypad that operate without an advanced operating system.

**Smart Phone** – Devices with touchscreens and an advanced OS. Smartphones facilitate online access as well as a range of functions superior to a standard mobile phone. These may include email access, web browsing, having a 'qwerty' keyboard or touch screen, the ability to open documents and download and use applications or software. (Source - Connected Consumers Report)



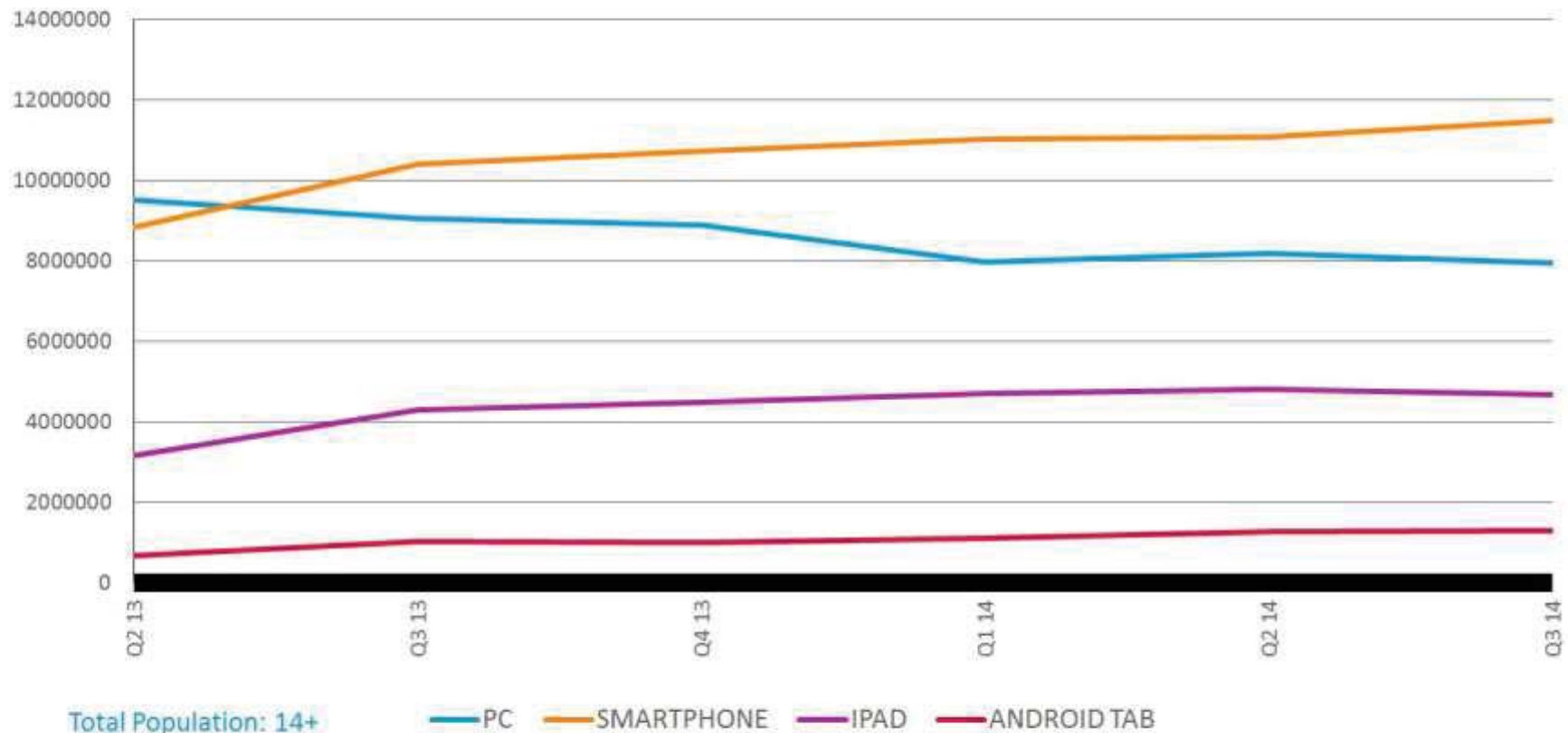
## PEOPLE: ACCESSING THE INTERNET VIA DEVICES (MONTHLY)

More than 13 million Australians aged 14 years and over access the internet via a smartphone at some time in a month, up 1 million from this time last year. Almost 13 million still access via a Windows PC at some time in a month.



## PEOPLE: ACCESSING THE INTERNET VIA DEVICES (DAILY)

Almost 11.5m Australians aged 14 years and over access the internet via their smartphone every day, up from around 10.5m at same time last year. Conversely the number of Australians accessing the internet via a Windows PC every day has dropped by about 1 million from this time last year.





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# CATEGORY SPOTLIGHT: MASS MERCHANDISER



## TOP 10 MASS MERCHANDISER SITES – AUDIENCE

**9.4 million** Australians visited the Mass Merchandiser category. Australians were highly engaged with this retailer based online content, this is evident through the time spent with the category; as it increased by almost **3 minutes per person** this month, compared to August.

Month-on-month comparisons:

- 5 of the top 10 sites had growth in **Unique Audience**.
- In terms of **growth in Unique Audience – Officeworks** lead this ;+14%.
- **JB Hi-Fi** also saw significant growth in audience of **130,000** – up **10 percent** on last month.
- 7 of the top 10 sites saw an increase in time spent metrics – **Amazon** and **Target Australia** the most notable – with **22%** and **20%** increases in **Time Per Person**.

Sites	Unique Audience (000)	Time Per Person (hh:mm:ss)	Time Per Person (hh:mm:ss)	Time Per Person Growth	Sessions Per Person
	September	August	September	(%)	September
Amazon	3,307	00:19:46	00:24:10	22	3.54
Woolworths	2,474	00:18:29	00:19:32	6	3.08
Coles	2,120	00:21:04	00:17:27	-17	3.24
Woolworths HomeShop	1,447	00:22:58	00:26:22	15	2.43
JB Hi-Fi	1,427	00:10:00	00:11:56	19	2.09
Target Australia	1,284	00:10:08	00:12:09	20	3.07
Harvey Norman	1,258	00:08:21	00:07:00	-16	2.50
Big W	1,194	00:07:06	00:06:12	-13	2.03
Officeworks	1,146	00:11:10	00:12:03	8	1.83
Myer	1,054	00:14:42	00:14:24	-1	2.10



## MASS MERCHANDISER – GENDER SNAPSHOT - AUDIENCE

Females are **leading** in terms of time spent and audience visiting the Mass Merchandiser category; there was a boost of **96,000 females** this month - furthermore, this demographic saw a **5% increase in Time Per Person**.

Using **Nielsen's Consumer & Media View**, we can add **supplementary insights** about the device behaviours of the **female audience** within the **top brands** of the Mass Merchandiser category:

- **eBay** has a higher skew towards Females who use a tablet *most often* to access the internet – **Tablet (48.6%) vs. Mobile (47.8%) vs. PC/Desktop (41.7%)**.
- Female users of **Gumtree** are also slightly more likely to use a tablet *most often* for online access: **Tablet (29.9%), Mobile (28.2%) and Laptop (28.5%)** had similar proportions).
- Interestingly, the female audience visited the **Coles** website more-so on their **Mobile Phones (16.4%)** compared to a **PC/Desktop (15.5%)**.



Unique Audience (000)	Active Reach	Time Per Person (hh:mm:ss)	Sessions Per Person
September	%	September	September
4,455	52.08	00:49:55	7.61



Unique Audience (000)	Active Reach	Time Per Person (hh:mm:ss)	Sessions Per Person
September	%	September	September
4,961	54.52	01:14:12	7.38



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# CATEGORY SPOTLIGHT: ONLINE GAMES





## TOP 10 ONLINE GAMES SITES– AUDIENCE

Online games at a **total category** had substantial growth across audience, time spent and traffic measures; this growth may have been influenced by the school holidays during September - **+6% Unique Audience, +6% Sessions Per Person** and **+3% Time Per Person**.

Month-on-month comparisons:

- **6** of the top **10** sites had growth in **Unique Audience** – **GameNutt** benefitted the greatest from this holiday period; a huge boost of **157%** growth in UA. **GameSpot Network** also saw a great increase of **+32%**.
- **Time Per Person** saw substantial growth; **8** of the **10** top sites; **7** of which had double digit increases:  
**EA – Electronic Arts Online - +52%, Origin - +47%, Steam - +22%.**

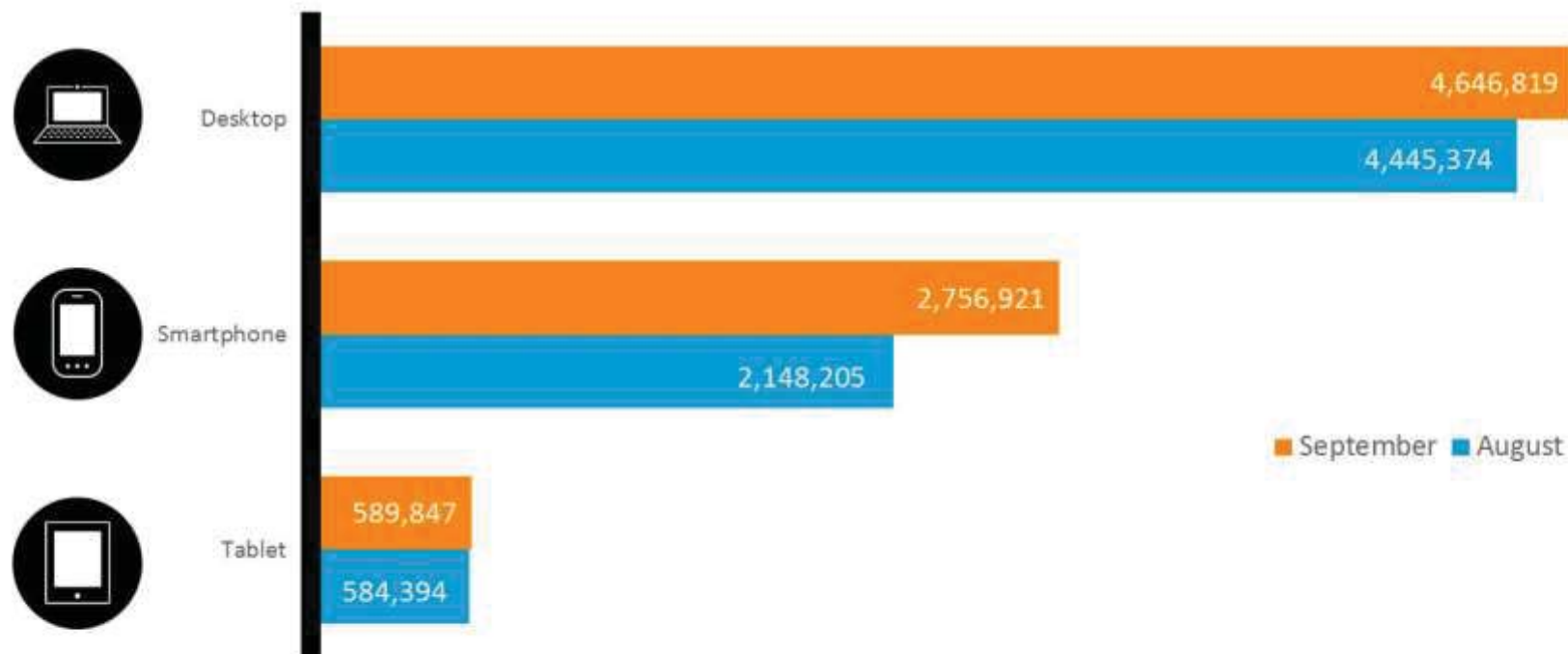
Sites	Unique Audience (000)	Time Per Person (hh:mm:ss)	Time Per Person (hh:mm:ss)	Time Per Person Growth	Sessions Per Person
	September	August	September	(%)	September
Steam	1,310	01:20:22	01:38:02	22	19.46
King.com	923	03:57:06	04:06:07	4	14.16
GameSpot Network	895	00:24:13	00:25:34	6	4.21
EA – Electronic Arts Online	619	02:01:45	03:05:40	52	8.41
Origin	594	00:17:09	00:25:17	47	12.43
IGN Gaming Websites	552	00:23:15	00:33:22	44	6.57
EBGames.com.au	436	00:11:46	00:13:00	10	2.83
Zynga	415	06:26:28	06:17:52	-2	18.78
GameNutt	408	00:08:56	00:24:34	175	4.11
GameFAQs	390	00:34:58	00:33:22	-5	4.74



## ONLINE GAMES – DEVICE TRAFFIC

Based on Nielsen Online Ratings - Hybrid, there were 7 million Australians visiting the online games category during September; in addition, Nielsen Market Intelligence reveals a **15%** increase in average daily unique browsers for the month of September - to roughly **190,000**.

There was similarly robust growth in terms of total sessions on online gaming sites via a smartphone. In September, **35% of total online sessions** for the online games category came from smartphones; a **5%** increase from last month. Tablet remained at **8%** of online sessions; while desktop/laptop declined to **59%** down from **63%**.



Metrics: Total Sessions

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

Source: Nielsen Online Ratings - Hybrid, September 2014

Source: Nielsen Market Intelligence, August and September 2014

An abstract graphic on the left side of the slide. It features a curved, grid-like structure resembling a portion of a sphere or a dome. The grid is composed of thin, intersecting lines in various colors including red, green, blue, and yellow. Several colored dots (yellow, green, purple, red) are placed at various points on the grid, with thin lines extending from them towards the right, suggesting data points or connections.

## GENERAL UPDATES FOR THIS MONTH:

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# NIELSEN ONLINE CAMPAIGN RATINGS



# NIELSEN ONLINE CAMPAIGN RATINGS

THE AUSTRALIAN STORY SO FAR...



4

AVERAGE NUMBER OF  
PUBLISHERS PER CAMPAIGN



10m

AVERAGE NUMBER OF  
IMPRESSIONS PER CAMPAIGN



1.8m

AVERAGE UNIQUE  
AUDIENCE PER CAMPAIGN

## PRODUCT UPDATES

- OCR APIs are available now (*both tagging and reporting*)
- Benchmarks for Q3 2014 to be released in November
- New OCR UI coming soon with additional functionality
- Video Viewability is currently being trialed for release in 2015



200+

UNIQUE PUBLISHER SITES  
MEASURED BY OCR

AN UNCOMMON SENSE OF THE CONSUMER™



# AUSTRALIAN CONNECTED CONSUMERS REPORT, 2015

## NIELSEN'S 2015, AUSTRALIAN CONNECTED CONSUMER REPORT

**HOW DID AUSTRALIANS' CROSS-PLATFORM CONTENT CONSUMPTION CHANGE THROUGH 2014?**

**DID SMARTPHONE OWNERSHIP REACH THE FORECAST 78% AND ARE TABLETS NOW IN CLOSE TO 6 IN 10 HOMES?**

We're in the process of designing the 2015 Australian Connected Consumers Report – the 17<sup>th</sup> annual edition.

Keep an eye out for our **pre-subscription** offer and your chance to get involved in questionnaire design and input into the report outcomes.

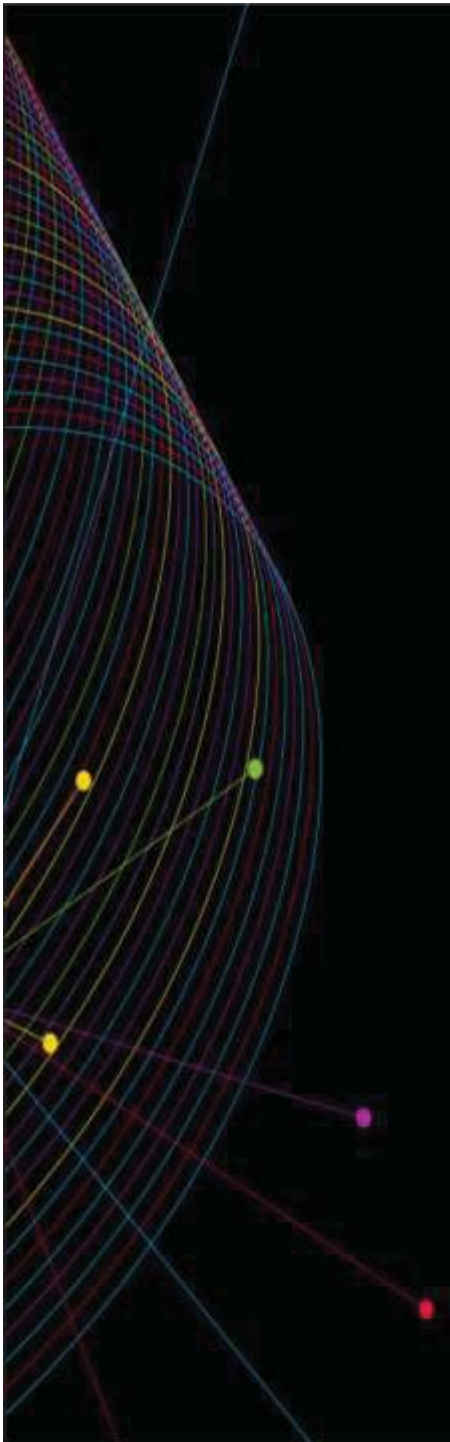
**COMING SOON!**



AN UNCOMMON SENSE OF THE CONSUMER™



# NIELSEN AUSTRALIAN EGENERATION REPORT





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

## Nielsen 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.

The **Nielsen Australian eGeneration Report will be published by 31<sup>st</sup> December, 2014**

This report will help you:

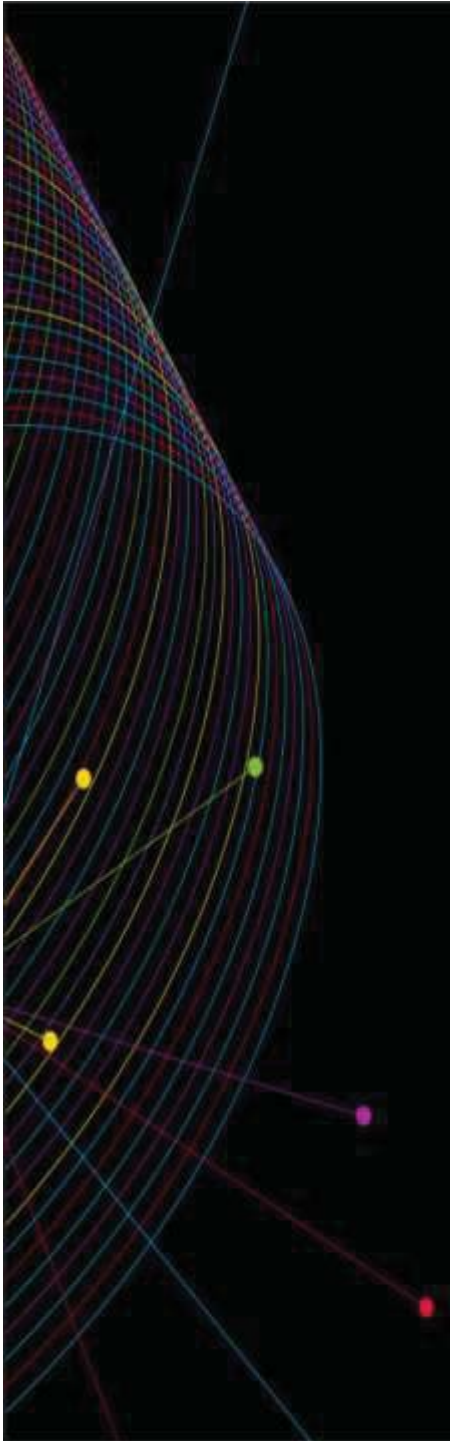
- Understand interactions with social media, entertainment content and apps.
- Gain insight into how 2-15 year olds are connecting and consuming content across portable devices (tablet, mobile), games consoles, media players and PCs/laptops.
- **See opportunities to start a journey with these consumers and your brand now... and into the 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.

AN UNCOMMON SENSE OF THE CONSUMER™



# NIELSEN/TELSTRA SMARTPHONE & TABLET INDEX 2014



# NIELSEN/TELSTRA WHITEPAPER: CROSS-PLATFORM CONSUMERS

## MEDIA MULTI-TASKING AND MULTI-SCREENING IN TODAY'S MOBILE LANDSCAPE

Among all mobile Australians 16+, two in three are multi-screener – that is, they use more than one screen (TV, smartphone, tablet, laptop or desktop) at the same time (67%). When segmenting multi-screener into how many screens they have used at the same time there are more that have used three or more screens than those that only use two.

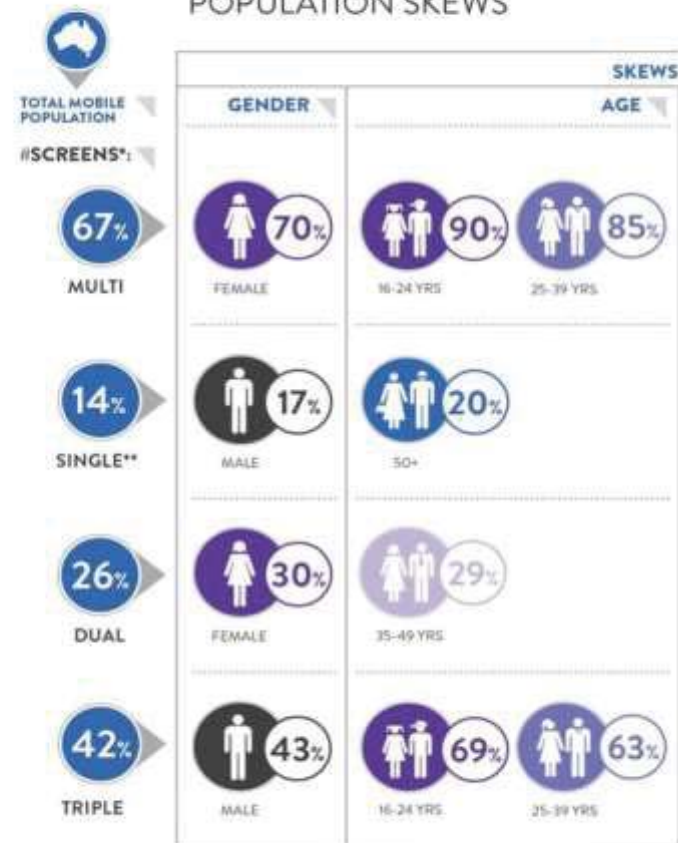


**Want to know more?** Read more about multi-screening and media-multi-tasking in today's mobile landscape via the Nielsen / Telstra whitepaper on Cross-Platform Consumers – with insights taken from the annual *Telstra Smartphone & Tablet Index*

Click here to download the **whitepaper**  
<http://www.telstra.com.au/aboutus/download/document/nielsen-telstra-cross-platform-consumers-whitepaper-2014.pdf>

For more information about the whitepaper or the *Telstra Smartphone & Tablet Index* report please contact: [Steve.Carey@team.telstra.com](mailto:Steve.Carey@team.telstra.com)

### MULTI-SCREENING: POPULATION SKEWS



\*SCREENS: SMARTPHONE, TABLET, TV, LAPTOP OR DESKTOP. MULTI - MORE THAN ONE, SINGLE - ONLY USES ONE SCREEN, DUAL - USES NO MORE THAN TWO SCREENS AT A TIME, TRIPLE - USES THREE OR MORE SCREENS AT A TIME.

\*\*SINGLE SCREEN DATA INCLUDES THOSE THAT OWN A SMARTPHONE OR A TABLET WHO INDICATED THEY DO NOT USE THEIR DEVICES WITH ANY OTHER MEDIA OR ACTIVITY.

BASE: TOTAL AUSTRALIAN MOBILE POPULATION AGED 16+ n=2,000.





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## CONTACT

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