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THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

OCTOBER 2014



STATE OF THE ONLINE LANDSCAPE

October 2014

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

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

- Entertainment with a specific focus on **broadcast media** sites.
- Telecom / Internet Services with observation within the Multi-telecom/internet services category.

The online landscape in October saw Australians spend 38 hours online over 67 sessions. There were nearly 41 billion minutes spent online with 31 billion pages viewed. October was also a month that showed high engagement with streaming content – a 25% increase for total streams and 8% for total minutes, compared to September.

Also included are some important notifications relating to:

1. Nielsen Twitter TV Ratings.
2. Microsoft / Nine Entertainment Company Reporting Changes.
3. New Online Ratings Training Program.
4. Market Intelligence product update.

If you'd like to know more about any of the insights presented within this report, please contact your Nielsen Account Manager directly or email careau@nielsen.com.



HIGHLIGHTS

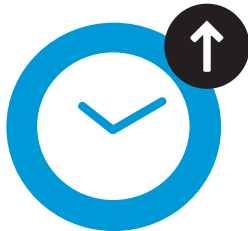
NIELSEN ONLINE RATINGS: HYBRID

AT A GLANCE: THE ONLINE LANDSCAPE

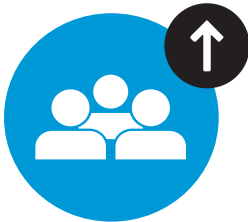
October 2014



31 billion viewed pages.



41 billion minutes spent.



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



17,584,000 people were actively surfing online.

↑ ↓ Indicates growth or decline based on the previous month

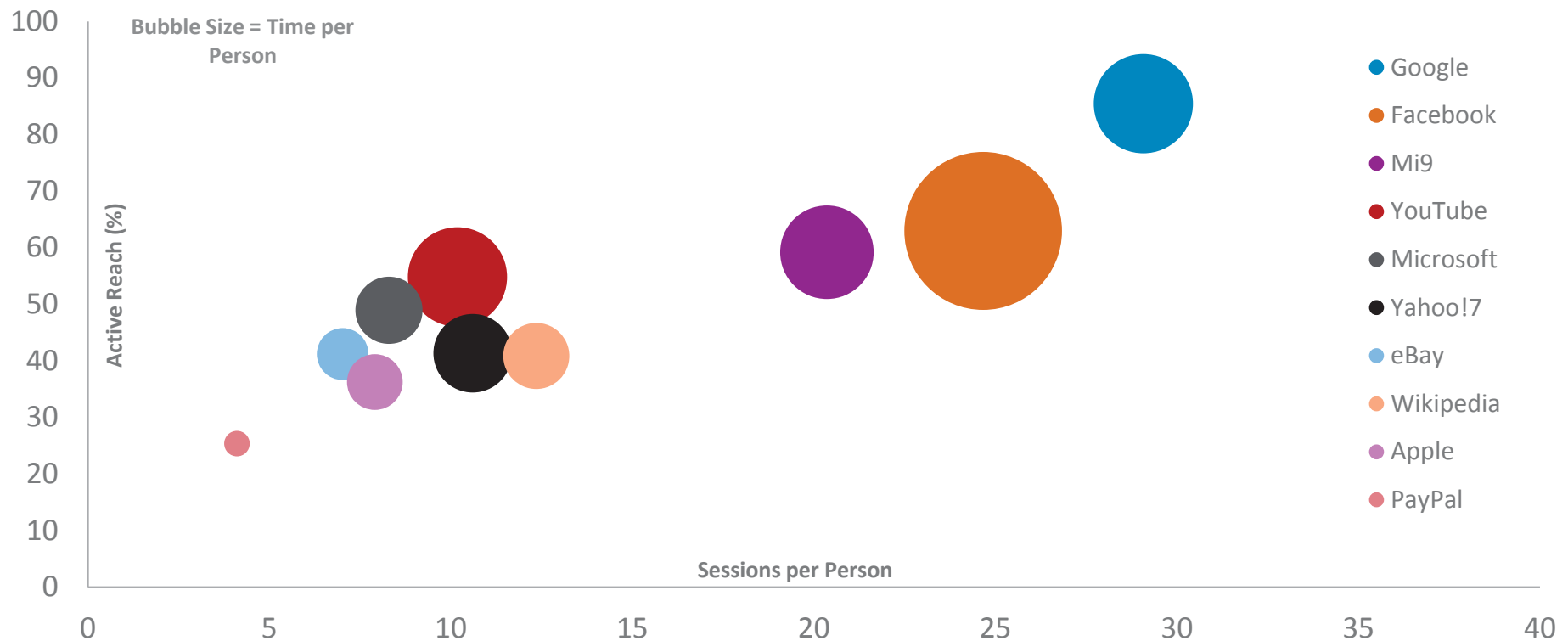
TOP 10 BRANDS AND THEIR ENGAGEMENT

October 2014

Unique Audience Rank	Brands	Unique Audience (000s)	Page Views (000s)	Active Reach (%)	Sessions Per Person	Time Per Person (hh:mm:ss)
1	Google	15,024	3,744,558	85.44	29.07	03:05:26
2	Facebook	11,070	2,016,827	62.95	24.66	07:48:45
3	Mi9	10,405	1,199,289	59.17	20.35	02:44:52
4	YouTube	9,638	773,539	54.81	10.18	03:05:53
5	Microsoft	8,600	45,588	48.91	8.29	01:24:46
6	eBay	7,269	1,006,897	41.34	10.59	01:56:10
7	Wikipedia	7,242	282,942	41.19	7.02	00:50:26
8	Yahoo!7	7,182	415,453	40.84	12.35	01:22:13
9	Apple	6,370	36,390	36.23	7.90	00:58:41
10	PayPal	4,457	104,910	25.35	4.10	00:12:22

TOP 10 BRANDS AND THEIR ENGAGEMENT

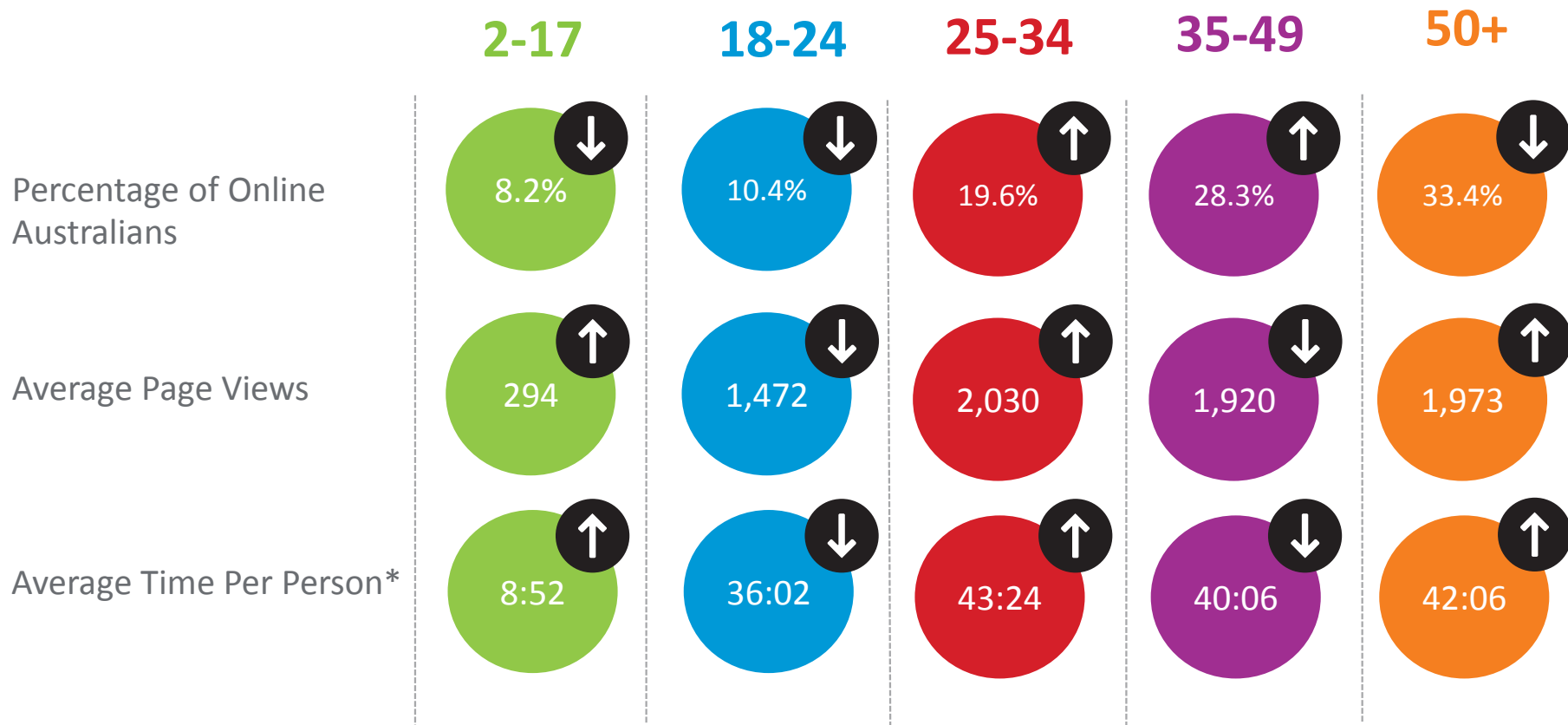
October 2014



Mi9 saw engagement with their surfing content grow among their audiences; 16% more time per person and 9% more sessions per person, compared to last month. Yahoo!7 had some significant growth in regards to engagement; +7% for time per person and +8% for sessions per person.

HYBRID SURFING: AGE DEMOGRAPHICS ONLINE

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



↑ ↓ Indicates growth or decline based on the previous month

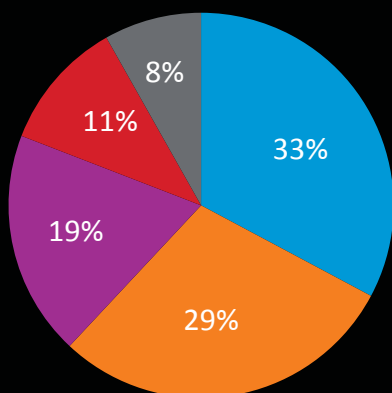
*HH:MM

GENDER BREAKDOWN – ACTIVE UNIVERSE



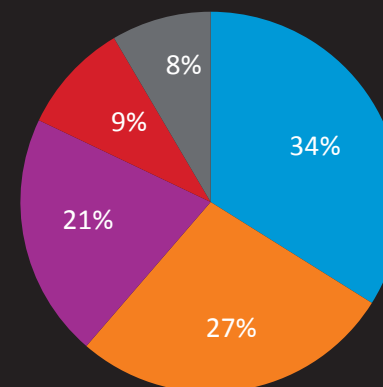
8,939,000 UA

- 50+
- 35-49
- 25-34
- 18-24
- 2-17



8,646,000 UA

- 50+
- 35-49
- 25-34
- 18-24
- 2-17



Overall, there were less online Australians surfing content this month; the 25-34, male age demographic did show an influx of unique audiences though; 10% increase in the active online population among this segment.

Furthermore, across all age demographics – streams per person was up. Especially, the 2-17 age bracket which had a +62% in streams per person, compared to September.



HIGHLIGHTS

NIELSEN ONLINE RATINGS: HYBRID STREAMING

HYBRID STREAMING KEY ONLINE STATISTICS

October 2014



3.0 billion streams watched.



5.7 billion minutes streamed.



7 hours and 10 minutes spent streaming per person.



13,190,000 people were actively streaming online.

↑ ↓ Indicates growth or decline based on the previous month

HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

October 2014

Unique Audience Rank	Brand	Unique Audience (000s)	Total Streams	Time Per Person (hh:mm:ss)
1	YouTube	11,100	1,543,137	04:07:42
2	Facebook	5,534	126,838	01:10:41
3	VEVO	3,567	92,576	00:47:17
4	The CollegeHumor Network	2,543	9,184	00:16:34
5	Mi9	2,285	37,925	00:42:28
6	News.com.au	1,595	10,621	00:08:25
7	Anyclip	1,593	116,608	00:17:55
8	Smh.com.au	1,350	4,990	00:05:50
9	Yahoo!7	1,313	13,358	00:44:54
10	ABC Online Network	1,179	8,522	01:59:41

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, October 2014

HYBRID STREAMING: TOP CHANNELS ON YOUTUBE

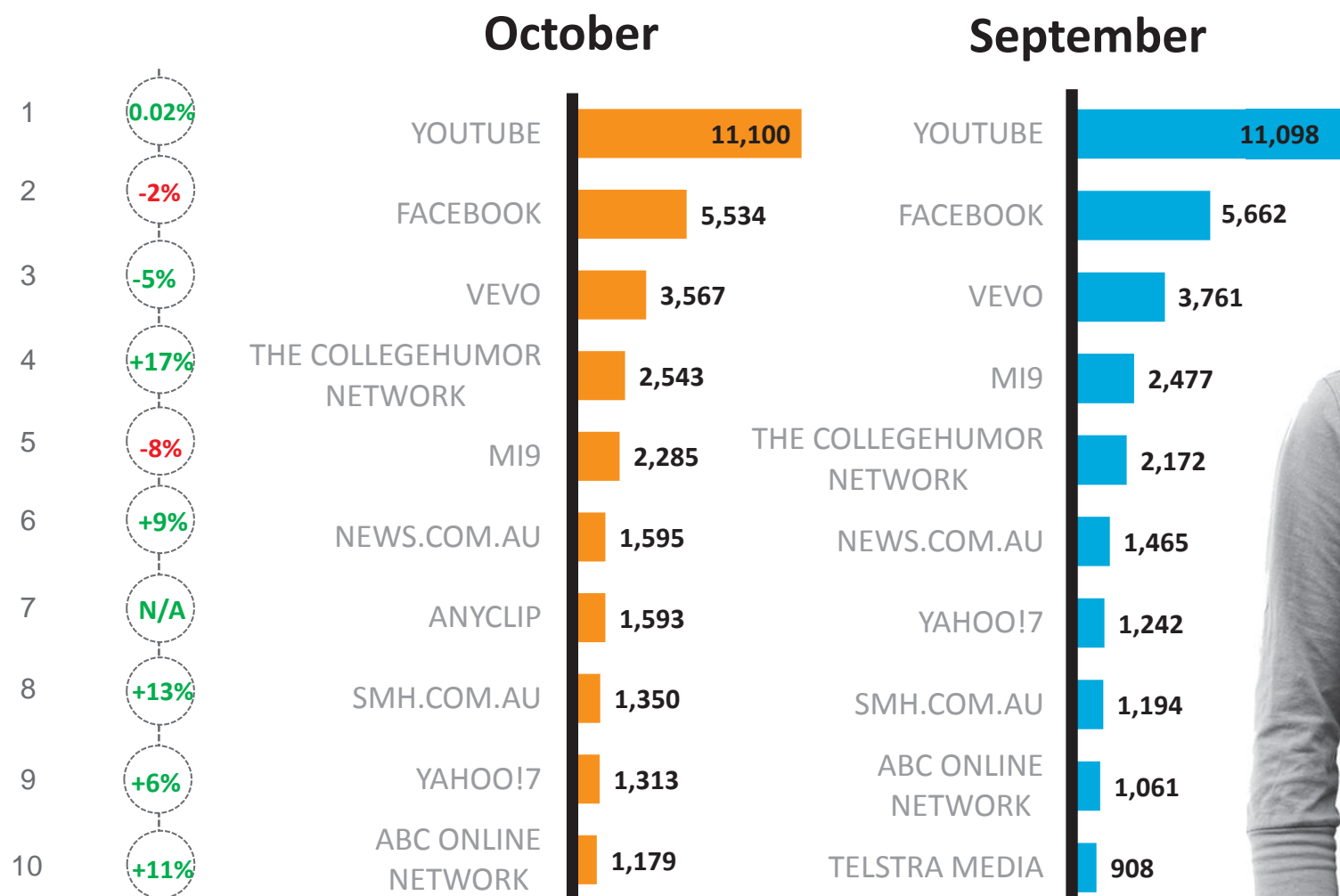
October 2014

In the month of October – there were 13 YouTube partner brands that achieved unique audiences of over 1 million.

Unique Audience Rank	Channel	Unique Audience (000s)	Streams Per Person	Time Per Person (hh:mm:ss)
1	Disney/Maker Studios	3,063	42	02:19:49
2	Warner Music	2,631	11	00:13:34
3	Fullscreen	2,319	34	01:11:42
4	SonyBMG	2,186	7	00:10:01
5	UMG	2,000	5	00:05:21
6	Machinima	1,785	36	00:50:14
7	ZEFR	1,522	8	00:07:53
8	Rightster	1,521	10	00:10:56
9	FremanetleMedia	1,428	12	00:44:53
10	The Orchard	1,371	9	00:13:40
11	BroadbandTV	1,314	28	00:30:13
12	QuizGroup	1,207	17	00:30:46
13	Defy Media	1,168	15	00:20:49

TOP BRANDS COMPARISON – HYBRID STREAMING

October 2014, Unique Audience (000)



GENDER BREAKDOWN – HYBRID STREAMING



6,474,000



Number of Streaming Australians



6,716,000

1,221,478



Total Streams Viewed (000s)



1,740,145

189



Streams per person



259

07:13:26



Time Per Person (HH:MM:SS)

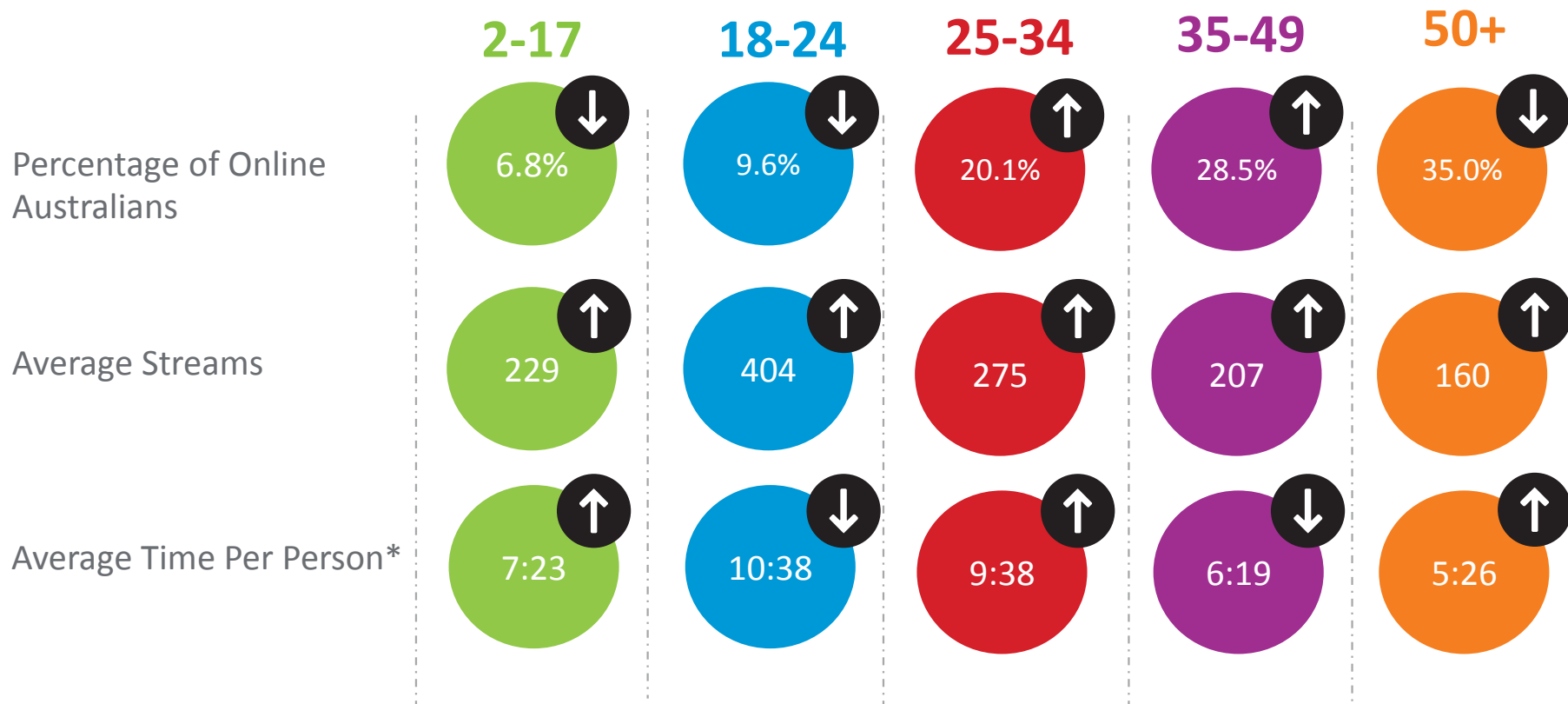


07:06:40

An additional 181,000 male Australians were streaming this month, this gender demographic also had 18% more total streams viewed; with an extra 33 streams per person. Meanwhile, there were fewer female Australians streaming, overall. However; their engagement with streaming content was on an incline – 35% more streams per person, compared to September.

HYBRID STREAMING: AGE DEMOGRAPHICS ONLINE

October 2014



↑ ↓ Indicates growth or decline based on the previous month

*HH:MM

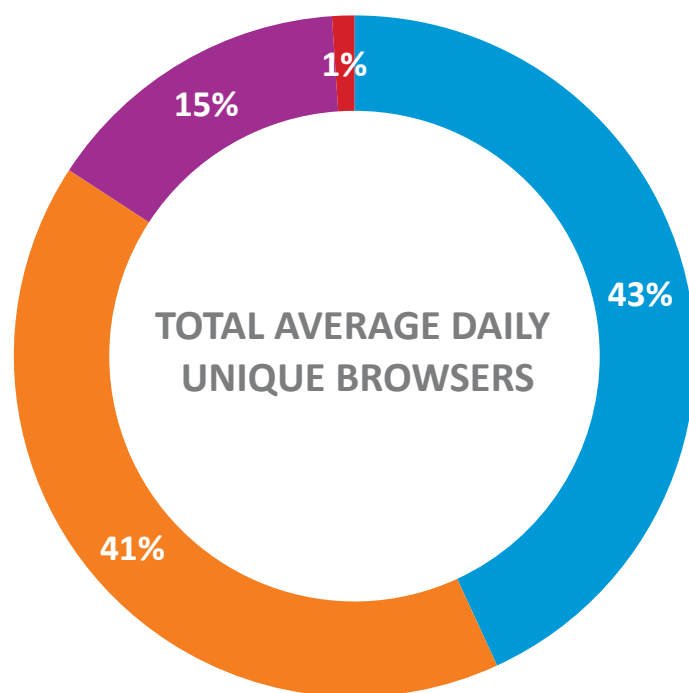


DEVICE HIGHLIGHTS

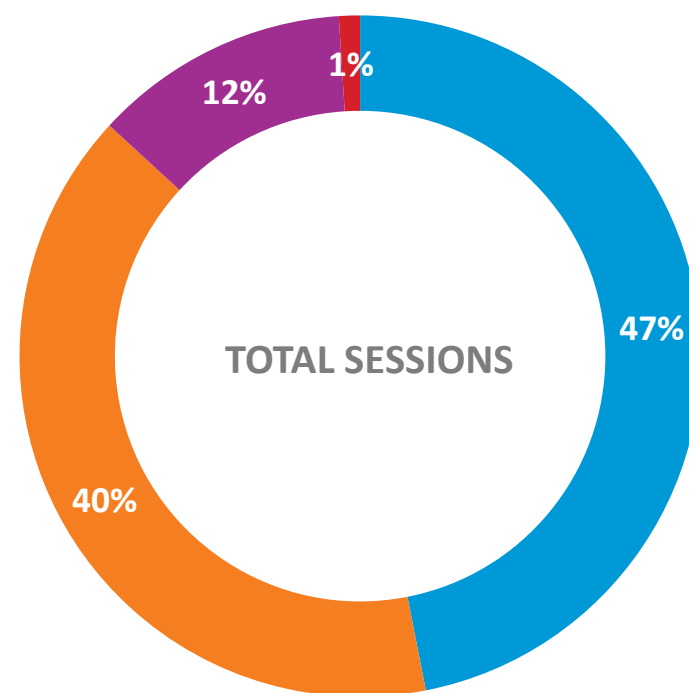
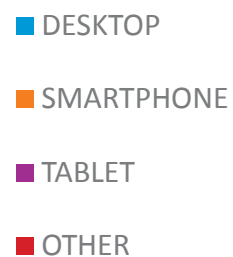
NIELSEN ONLINE RATINGS: MARKET INTELLIGENCE

DEVICE TYPE COMPARISON (EXCLUDING APPLICATIONS)

October 2014 – Market Domain – Domestic Traffic



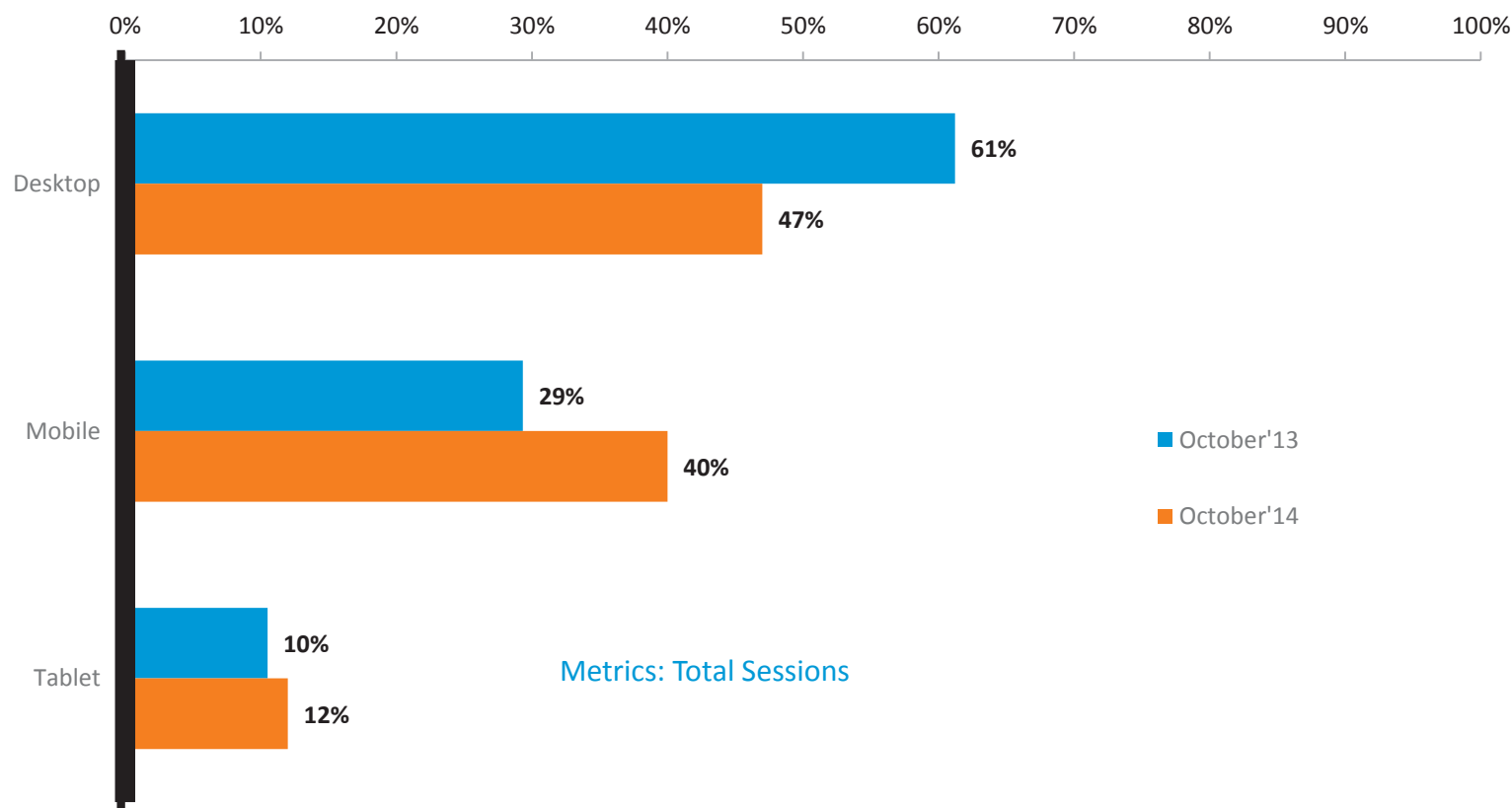
57% of Total
Average Daily Unique
Browsers came from
portable devices.



53% of Total
online sessions came
from portable devices.

DEVICE TYPE COMPARISON (EXCLUDING APPLICATIONS)

October 2014 vs. 2013 – Market Domain – Domestic Traffic - **Total Sessions**



Comparing yearly, total online sessions via the difference devices – there has been a +38% growth in total online sessions from mobiles / smartphones; tablet has also grown by 20%.



CATEGORY SPOTLIGHT: BROADCAST MEDIA



TOP 10 BROADCAST MEDIA SITES – AUDIENCE

Broadcast Media at a **category level** saw significant growth; in terms of **Unique Audience**. Nearly **7.4 million** online Australians **surf**ed this content or a **6%** increase from last month. Sessions Per Person (7.85) also slightly gained – **+2%**.

Diving into the top 10 sites (month-on-month comparisons):

- **6 out of the top 10** sites had growth in **Unique Audience** – **ABC TV Websites** and **TenPlay** stood out; with growth of **13%** and **32%**, respectively.
- **4 of 10** sites saw **double digit** increases in engagement (**Time Per Person**) – **SBS**, **Ninemsn Jump-in**, **ABC Radio Websites** and **BBC Worldwide**; **14%**, **24%**, **13%** and **20%**, respectively.

Sites	Unique Audience (000)	Time Per Person (hh:mm:ss)	Sessions Per Person
	October	October	October
ABC Online Network	4,318	00:48:00	8.71
Yahoo!7 TV	1,471	00:28:14	4.99
ABC TV Websites	1,466	00:29:34	3.94
SBS (Special Broadcasting Service)	1,396	00:19:49	4.55
Ninemsn Jump-in	1,286	00:31:55	4.17
ABC Radio Websites	1,131	00:13:38	3.56
TenPlay	1,054	00:29:04	3.26
Foxtel	925	00:16:57	3.74
BBC Worldwide	718	00:06:37	1.68
NBC Universal Websites	692	00:32:15	3.67

Note: The data is representative of surfing only.

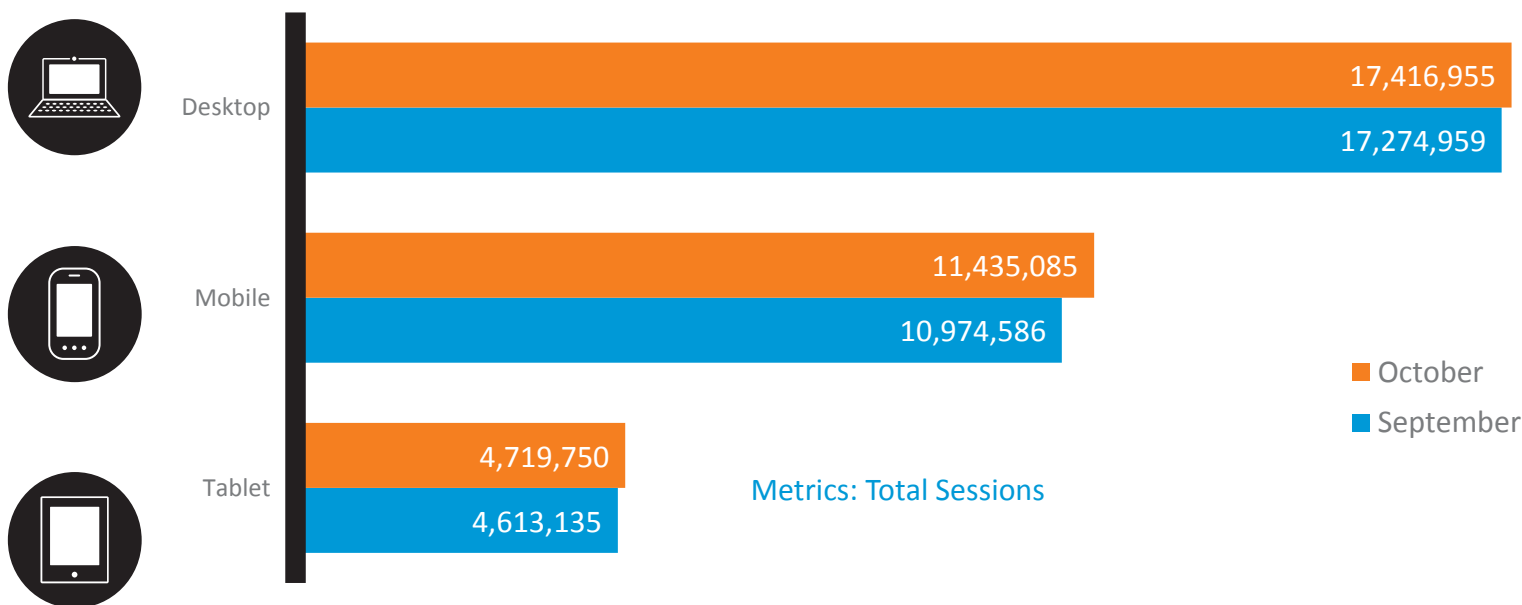
Source: Nielsen Online Ratings – Hybrid Surfing, September & October 2014



BROADCAST MEDIA BY DEVICE - TRAFFIC

October 2014 – Dataset: Surfing – Category

Comparing the **different device traffic** going to the broadcast media category – **mobile** saw the highest growth in **total sessions**; compared to desktop and tablet. Month-on-month, there were an additional **460,000 total sessions** for mobile – tablet and computer had similar levels of increases; both around the 140,000 mark.





CATEGORY SPOTLIGHT: TELECOM / INTERNET SERVICES



TOP 10 TELECOM/INTERNET SERVICES SITES – AUDIENCE

6.3 million online Australians browsed the ‘Multi-category Telecom/Internet Services’ **sub-category** in October; or the equivalent of 1 for every 3 online Australians. There was significant growth in unique audiences – an incremental boost of **8%**; with engagement also up - **Total minutes (+12%)**, **Time Per Person (+4%)** and **Total Sessions (+10%)**.

Furthermore, looking within the top 10 sites (comparing month-on-month) – **7** of the **top 10** sites saw growth in unique audience; notably **Optus, iiNet, Vodafone** and **TPG** had increases of **+24%, +28%, +14% and +39%**, respectively. Also, **5** of **top 10** sites saw **sessions per person** grow – with **Vodafone (+12%)** and **Primus (+53%)** experiencing double digit growth.

Sites	Unique Audience (000)	Unique Audience (000)	Unique Audience Growth	Sessions Per Person	Time Per Person (hh:mm:ss)
	September	October	%	October	October
Telstra Corporate Websites	2,940	3,055	4	4.17	00:30:10
Optus	1,245	1,539	24	4.40	00:24:18
iiNet	719	920	28	6.90	00:50:45
Vodafone	751	859	14	3.72	00:15:03
TPG	352	490	39	3.45	00:15:03
Dodo	299	371	24	4.40	00:26:48
Internode	271	355	31	4.11	00:23:49
Primus	289	261	-10	6.40	00:32:54
eXeTeL	129	116	-10	7.44	00:23:55
Westnet	141	100	-29	10.38	00:58:17



TELECOM/INTERNET SERVICES – AUDIENCE BREAKDOWN

- **Female Australians** are experiencing the sharpest spike in engagement growth rates. Notably, female respondents aged **12-24** have increased time spent **browsing the telecom/internet services category content** by **59%**.
- On the other hand, **male Australians** in the age bracket of **21-24** experienced growth rates of **31%**. These jumps in growth may have been influenced by the **school/public holidays** that occurred within the month of October.
- Interestingly, **both older male and female Australians** between the age demographics of **50 to 64** saw **growth rates of 38% and 22%**.
- In addition – observing the differences between the household incomes, **the \$75,000 - \$99,999** segment had the largest increase in **time per person (+16%)**, compared to September.



Unique Audience (000)	Time Per Person (hh:mm:ss)	Sessions Per Person
October	October	October
3,326	00:48:37	6.44



Unique Audience (000)	Time Per Person (hh:mm:ss)	Sessions Per Person
October	October	October
2,932	00:28:55	5.90

GENERAL UPDATES FOR THIS MONTH:

AN UNCOMMON SENSE OF THE CONSUMER™



ACCR & EGENERATION REPORT

EGENERATION REPORT & ACCR

Our eGeneration survey of 2-15 year olds and their parents has now been conducted and we are busy analysing the data and developing the report. Ask your account manager today if you want to hear some of the early, top-line findings!

Some early indicators:

- Tablets are popular connected devices for Aussie kids and teens: for regular online access, tablets are only just behind laptops.
- Apps by far the most prevalent method for kids and teens to access online content on their mobile phone.
- Online video is not only an opportunity among Australian adults: Streaming video is the third most popular online activity for kids and teens; behind only using the internet for homework and gaming.

The **Nielsen Australian eGeneration Report will be published by 31st December, 2014**

Also, the **17th annual edition of the Australian Connected Consumers report** is now open for pre-subscription. Get the **early bird rate** by **signing on before the end of the year**, and ask your account manager about the range of new developments planned for the 2015 report.



AN UNCOMMON SENSE OF THE CONSUMER™







NIELSEN TWITTER TV RATINGS



TOP 5 TWITTER TV PROGRAMS

OCTOBER 2014

NIELSEN TWITTER TV RATINGS (AUSTRALIA)

	NETWORK	DATE	PROGRAM	 UNIQUE AUDIENCE	 IMPRESSIONS	 TWEETS	 UNIQUE AUTHORS
1	9	05-10-14	NRL GRAND FINAL	228.8K	8.4M	75.0K	22.4K
2	7	12-10-14	V8'S - BATHURST 1000	179.1K	3.4M	37.9K	8.2K
3	9	12-10-14	THE BLOCK GLASSHOUSE - FINALE	141.6K	4.2M	24.8K	9.2K
4	10	02-10-14	THE BACHELOR AUSTRALIA - FINALE	132.5K	4.1M	18.5K	6.3K
5	7	20-10-14	X FACTOR - FINALE	112.5K	1.4M	24.9K	8.7K

For the first time in Australia, the audience reach of **Twitter conversations** about **TV** and **engagement levels** can be **measured** following today's launch of **Nielsen Twitter TV Ratings**.

Developed by Nielsen, a leading provider of insights into what people watch and buy, through an exclusive multi-year agreement with Twitter, this new measure will enable networks, agencies and advertisers to **understand how audiences are reacting to TV shows** and the reach of these conversations taking place on Twitter.

For more information about Nielsen Twitter TV Ratings, please visit:
<http://www.nielsen.com/au/en/solutions/measurement/social-tv.html>



MICROSOFT / NINE ENTERTAINMENT COMPANY REPORTING CHANGES

MICROSOFT / NEC REPORTING CHANGES

With the recent decision of Microsoft and Nine Entertainment Company (NEC) to split their joint reporting structure, please note the following changes to their representation in the Online Ratings interface.

- Due to the complexity of separating the Nine Entertainment Company entities and domains from the Microsoft parent and the creation of an entirely new structure for Nine Entertainment Company, October data will retain the current reporting structure under Microsoft parent.
- From November data release, Microsoft and Nine Entertainment Company will report to market as two separate parent structures.
- Please note Nine Entertainment Company will continue to represent both products in market from a sales perspective.
- **MSN Australia's new structure** and audience data across all verticals can be accessed in the following **Custom Roll-Ups for October Data**:

CR - MSN News, CR - MSN Homepage (Masked due to inaccurate data), CR - MSN Sport, CR - MSN Finance, CR - MSN Weather, CR - MSN Entertainment (includes Music, Movies, TV and Entertainment channels) CR - MSN Music, CR - MSN Movies, CR - MSN TV, CR - MSN Money, CR - MSN Lifestyle, CR - MSN Health & Fitness, CR - MSN Food, CR - MSN Travel, CR - MSN Autos, CR - MSN Video

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ONLINE RATINGS TRAINING PROGRAM

MASTER CLASS – DIGITAL AUDIENCE MEASUREMENT

Enrol in our new online ratings training program now!

- Developed in consultation with the Interactive Advertising Bureau (IAB) Australia and representatives of the Media Federation of Australia (MFA)
- Three self paced, online delivered learning modules
- Key learnings:
 - ✓ An understanding of the methodology
 - ✓ Gain deeper consumer insights
 - ✓ Learn how to apply those insights in the planning, buying and selling of online advertising.

Representatives of these companies are amongst the many who have already completed the program



To receive the training links please notify careau.com.au or your Nielsen Account Manager

MARKET INTELLIGENCE – PRODUCT UPDATE

MARKET INTELLIGENCE – PRODUCT UPDATE

October 2014

Product Update;

Facebook has rolled out an update to its mobile app in November which by default opens any links that are clicked on within its own browser.

This change will result in an artificial increase in reported mobile Unique Browsers in Market Intelligence from November onwards.

This increase will vary by site depending on how often links from a given site are shared on Facebook.

If you have any questions please contact your Account Manager or email careau@nielsen.com.



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