



nielsen

THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

DECEMBER 2014

iab.
australia preferred
supplier



STATE OF THE ONLINE LANDSCAPE

December 2014

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

The online landscape in December saw Australians spend 35 hours online over 62 sessions; with nearly 37 billion minutes spent online with 27 billion pages viewed. Compared to November, the average consumer spent 2 hours less browsing and 2 less sessions over Christmas period.

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

- Multi-Category Commerce with a specific focus on **Classifieds/Auctions and Mass Merchandiser** sites.

Also, please note the update for this month:

- eGeneration Report

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.



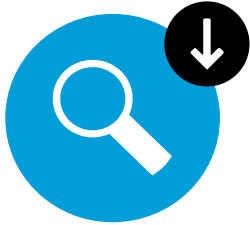
An abstract graphic on the left side of the slide. It features a series of concentric, curved lines that form a partial sphere or dome shape. The lines are colored in a spectrum of colors including red, orange, yellow, green, and blue. Several small, colored dots (yellow, pink, red) are placed on the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

HIGHLIGHTS

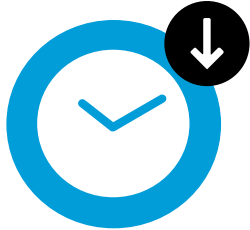
NIELSEN ONLINE RATINGS: HYBRID

AT A GLANCE: THE ONLINE LANDSCAPE

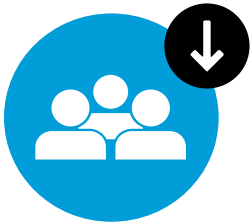
December 2014



27 billion viewed pages.



37 billion minutes spent.



35 hours spent online, across **62 sessions**.



17,641,000 people were actively surfing online.



Indicates growth or decline based on the previous month

TOP 10 BRANDS AND THEIR ENGAGEMENT

December 2014

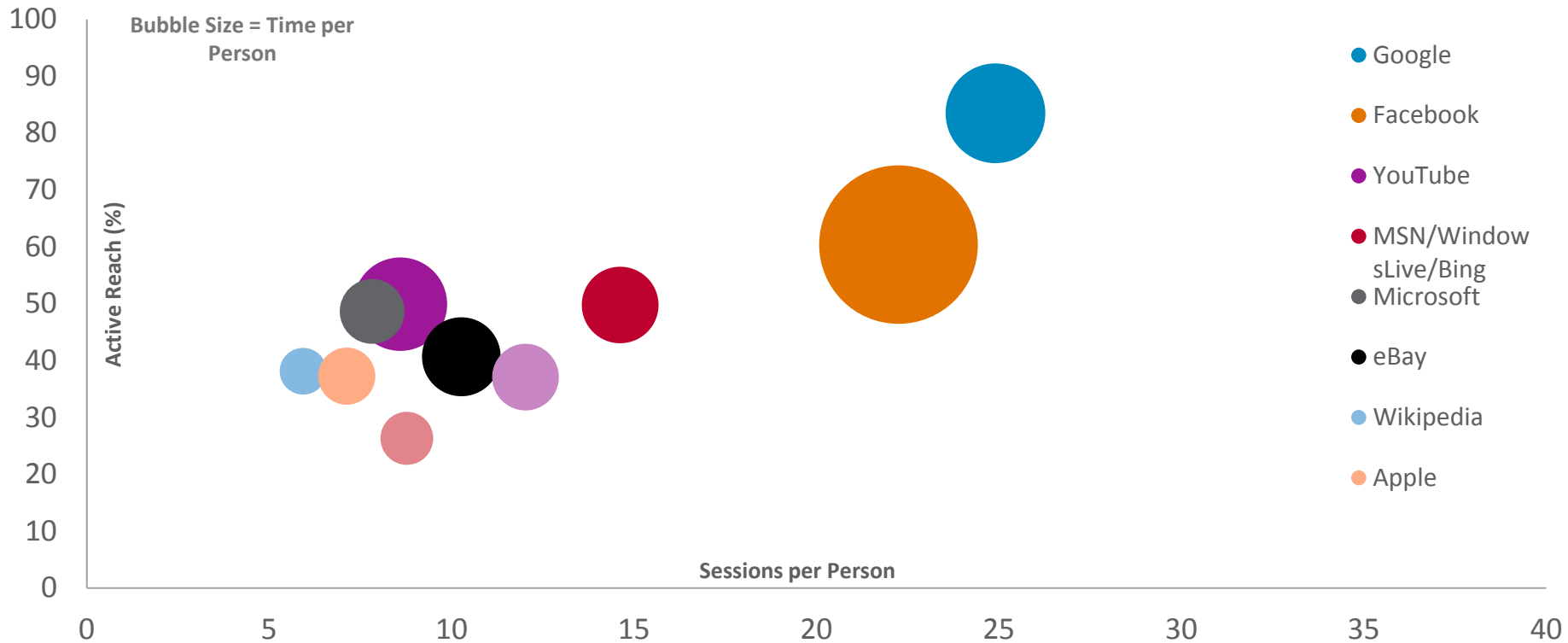
Unique Audience Rank	Brands	Unique Audience (000s)	Page Views (000s)	Active Reach (%)	Sessions Per Person	Time Per Person (hh:mm:ss)
1	Google	14,724	3,159,315	83.46	24.90	03:01:01
2	Facebook	10,654	1,962,962	60.39	22.24	07:37:59
3	YouTube	8,801	521,630	49.89	8.59	02:39:11
4	MSN/WindowsLive/ Bing	8,777	790,990	49.75	14.62	01:46:45
5	Microsoft	8,579	38,146	48.63	7.82	01:15:54
6	eBay	7,171	848,362	40.65	10.26	01:53:24
7	Wikipedia	6,723	187,977	38.11	5.93	00:40:02
8	Apple	6,572	28,560	37.25	7.12	00:59:22
9	Yahoo!7	6,540	363,234	37.07	12.02	01:20:55
10	ABC Online Network	4,643	125,848	26.32	8.77	00:51:04

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, December 2014

TOP 10 BRANDS AND THEIR ENGAGEMENT

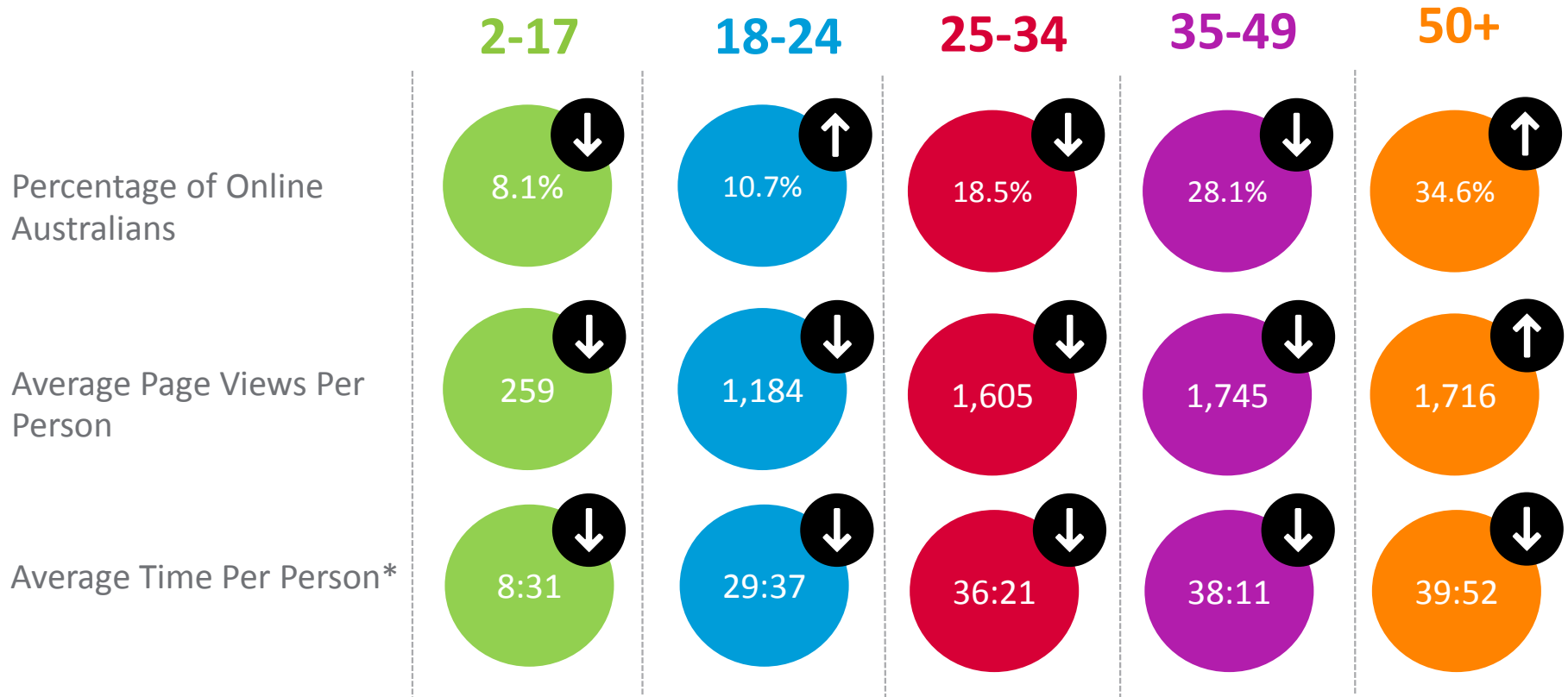
December 2014



Apple experienced an increase in engagement with their surfing content in contrast to last month, with a 5% increase in both active reach and time per person. Both Facebook and eBay also reported growth in sessions per person at 2.4% and 1.4% respectively.

HYBRID SURFING: AGE DEMOGRAPHICS ONLINE

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



Out of the two age groups that experienced growth this month, consumers in the 50+ age demographic increased their usage the most by 34.6% over this Christmas period.

↑ ↓ Indicates growth or decline based on the previous month

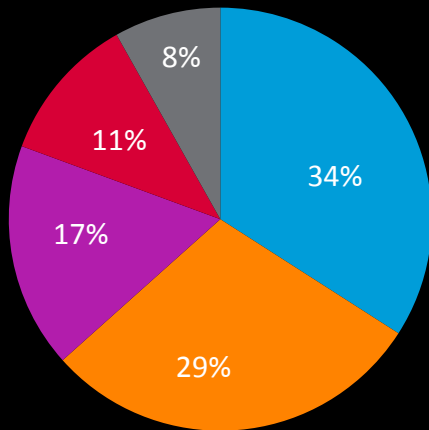
*HH:MM

GENDER BREAKDOWN – ACTIVE UNIVERSE



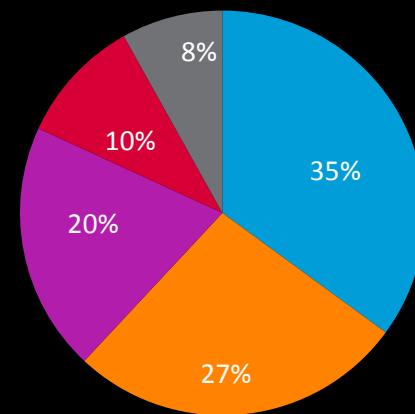
9,034,000 UA

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



8,607,000 UA

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



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 purple to yellow. Several small, colored dots (yellow, pink, red) are placed on the surface of the sphere, with thin lines extending from them towards the right side of the slide.

HIGHLIGHTS

NIELSEN ONLINE RATINGS: HYBRID STREAMING

HYBRID STREAMING KEY ONLINE STATISTICS

December 2014



3.0 billion streams watched.



6.2 billion minutes streamed.



7 hours and 51 minutes spent streaming per person.



13,049,000 people were actively streaming online.

↑ ↓ Indicates growth or decline based on the previous month

HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

December 2014

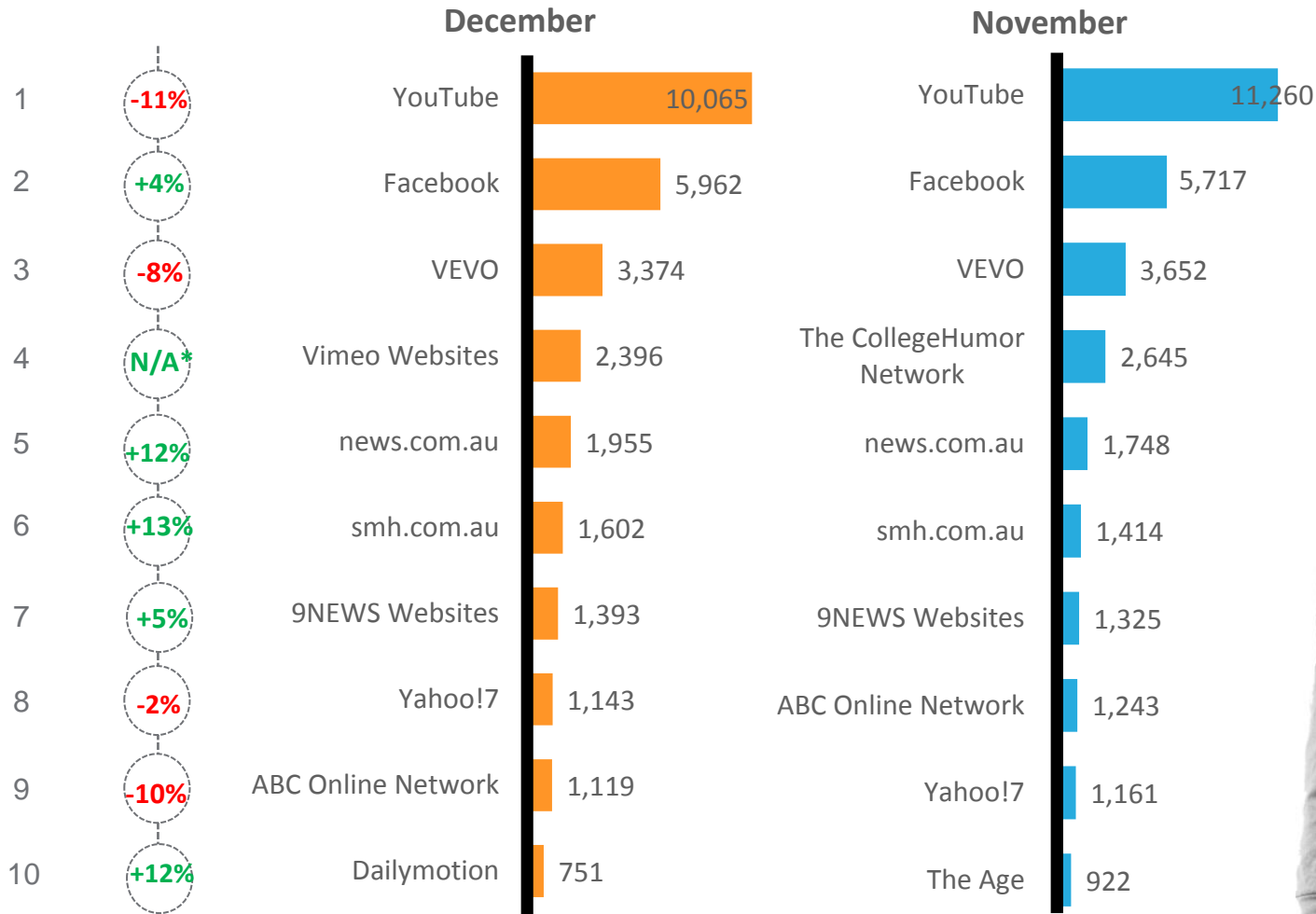
Unique Audience Rank	Brand	Unique Audience (000s)	Total Streams	Time Per Person (hh:mm:ss)
1	YouTube	10,065	1,481,249	05:03:07
2	Facebook	5,962	190,966	02:08:44
3	VEVO	3,374	102,335	00:38:49
4	Vimeo Websites	2,396	7,645	00:19:45
5	news.com.au	1,955	12,153	00:09:00
6	smh.com.au	1,602	6,392	00:07:15
7	9NEWS Websites	1,393	13,181	00:08:35
8	Yahoo!7	1,143	12,069	00:43:09
9	ABC Online Network	1,119	6,298	02:22:21
10	Dailymotion	751	32,100	00:44:43

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, December 2014 ¹¹

TOP BRANDS COMPARISON – HYBRID STREAMING

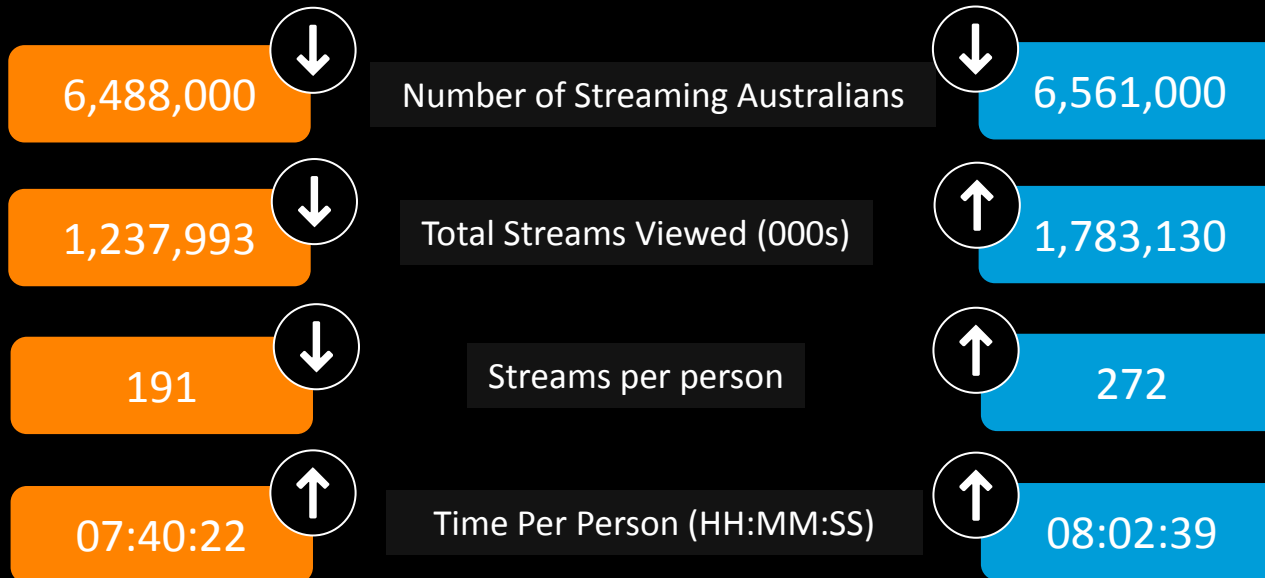
December 2014, Unique Audience (000)



Despite seasonal audience declines, news video sites have reported increases – news.com.au and smh.com.au experiencing increases of 12% and 13% respectively. *Vimeo Websites is a new channel and has no November data.



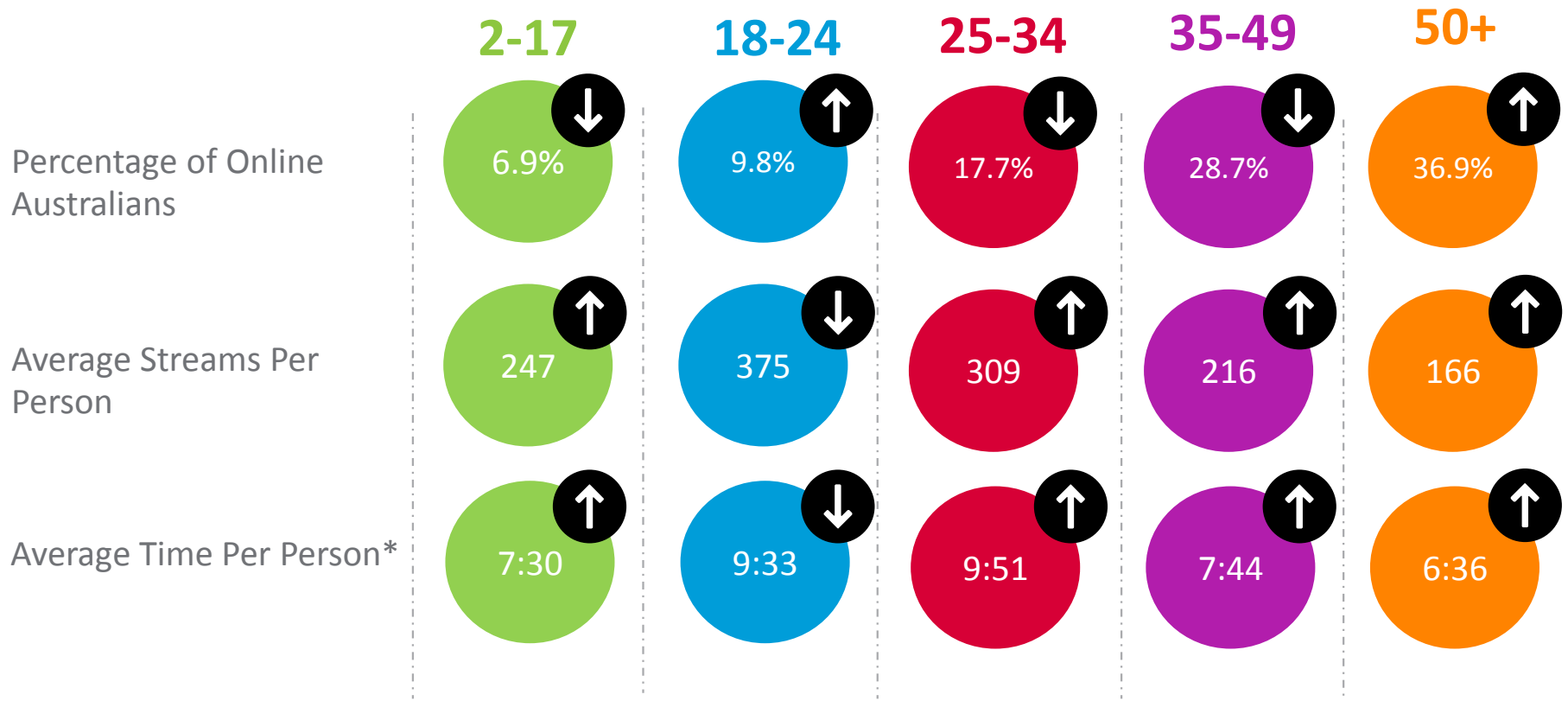
GENDER BREAKDOWN – HYBRID STREAMING



Australian males were streaming more video content this month, with an additional 76 million streams, at an extra 26 streams per person. Conversely, fewer female Australians were streaming this month, underpinned by declines in total streams and streams per person. The sole incline reported was an additional minute per person compared to November.

HYBRID STREAMING: AGE DEMOGRAPHICS ONLINE

December 2014



↑ ↓ Indicates growth or decline based on the previous month

*HH:MM

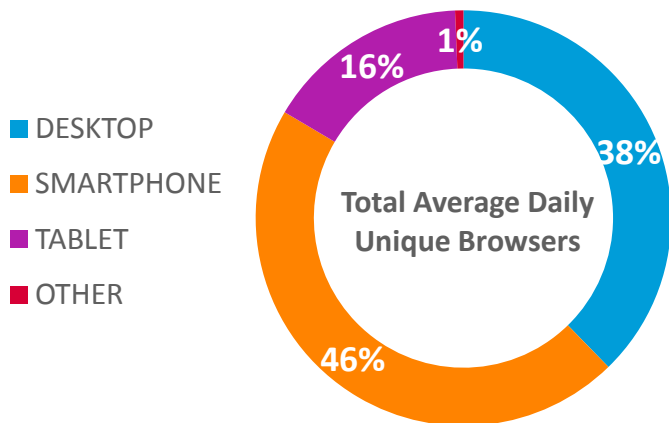
An abstract graphic on the left side of the slide. It features a series of concentric, curved lines that form a partial sphere or dome shape. The lines are colored in a gradient from purple to yellow. Several small, colored dots (yellow, purple, red) are scattered across the surface, with thin lines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

DEVICE HIGHLIGHTS

NIELSEN ONLINE RATINGS: MARKET
INTELLIGENCE

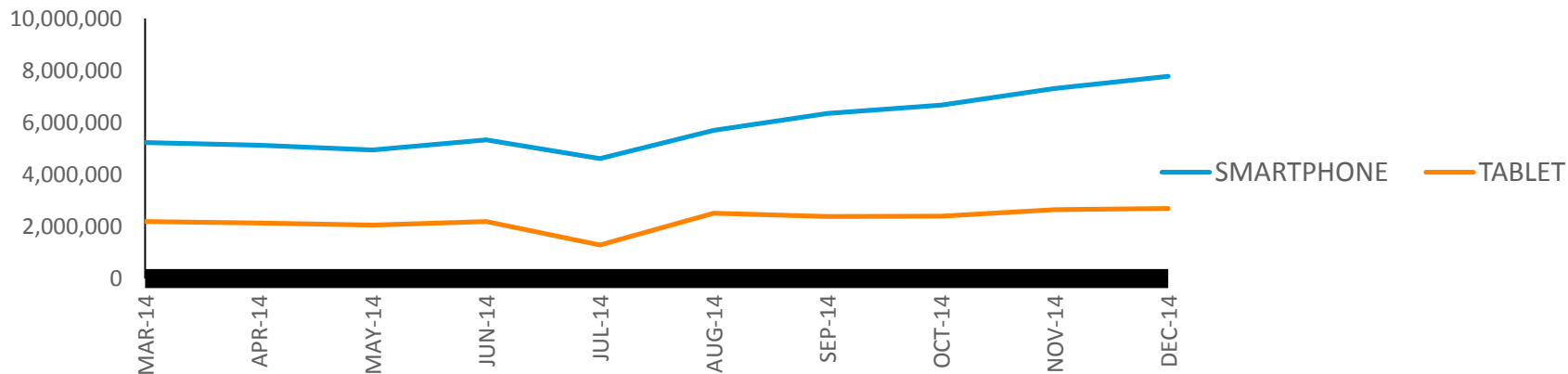
DEVICE TYPE COMPARISON (EXCLUDING APPLICATIONS)

December 2014 – Market Domain – Domestic Traffic



62% of Total Average Daily Unique Browsers came from portable devices.

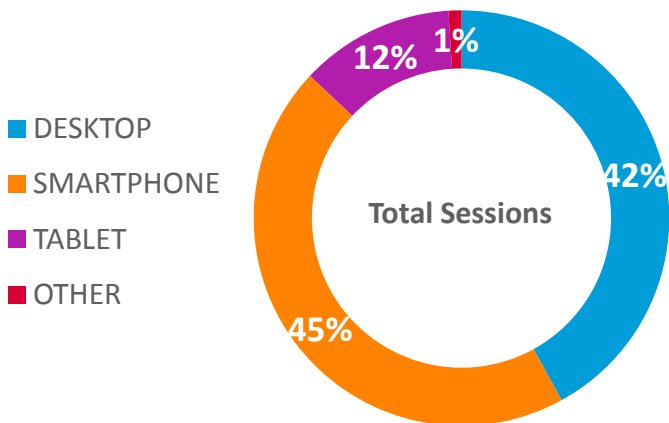
41% increase since March 2014 in total online sessions from portable devices



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

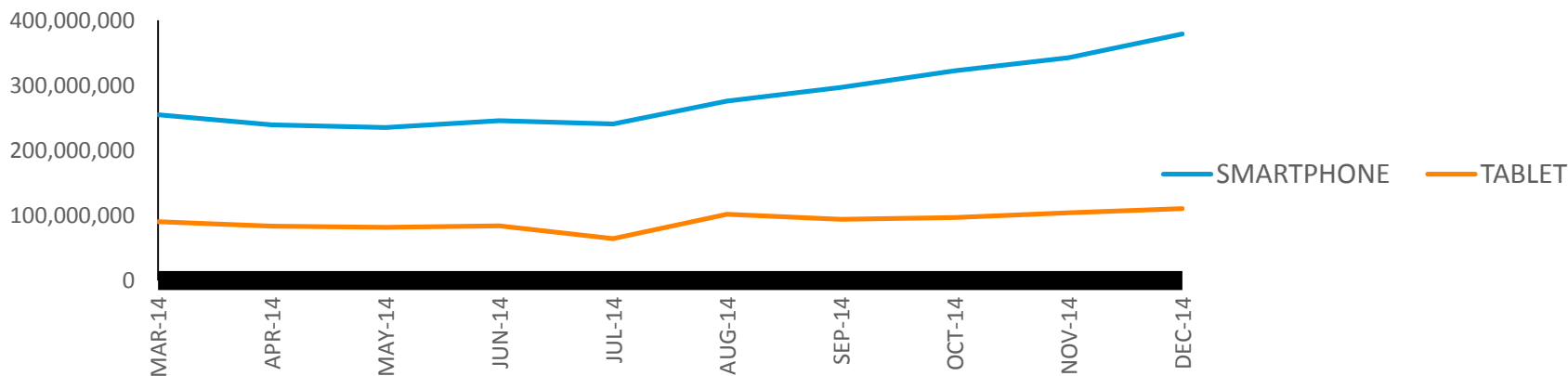
DEVICE TYPE COMPARISON (EXCLUDING APPLICATIONS)

December 2014 – Market Domain – Domestic Traffic



60% of Total online sessions came from portable devices

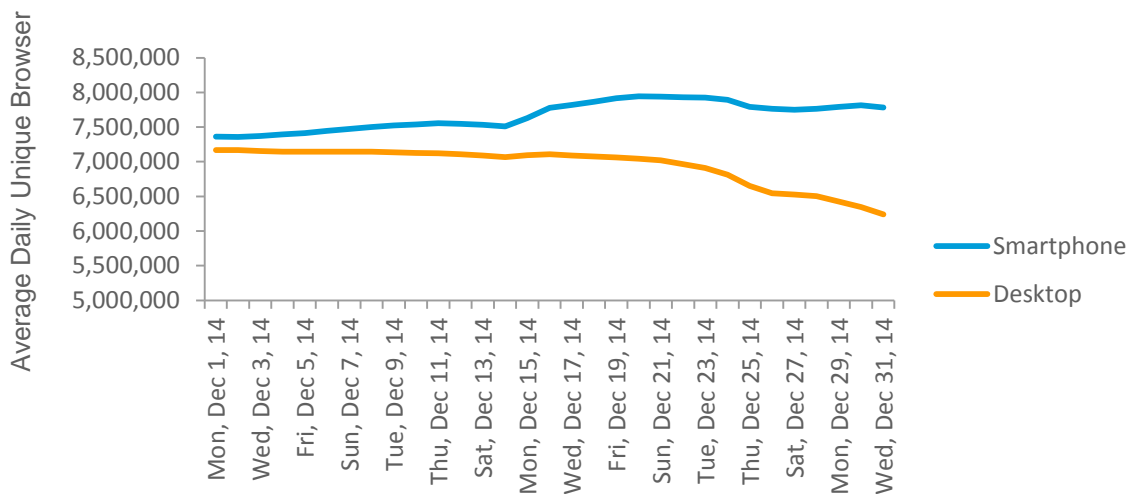
42% increase since March 2014 in total online sessions from portable devices



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

DEVICE TYPE COMPARISON (EXCLUDING APPLICATIONS)

December 2014 – Market Domain – Domestic Traffic

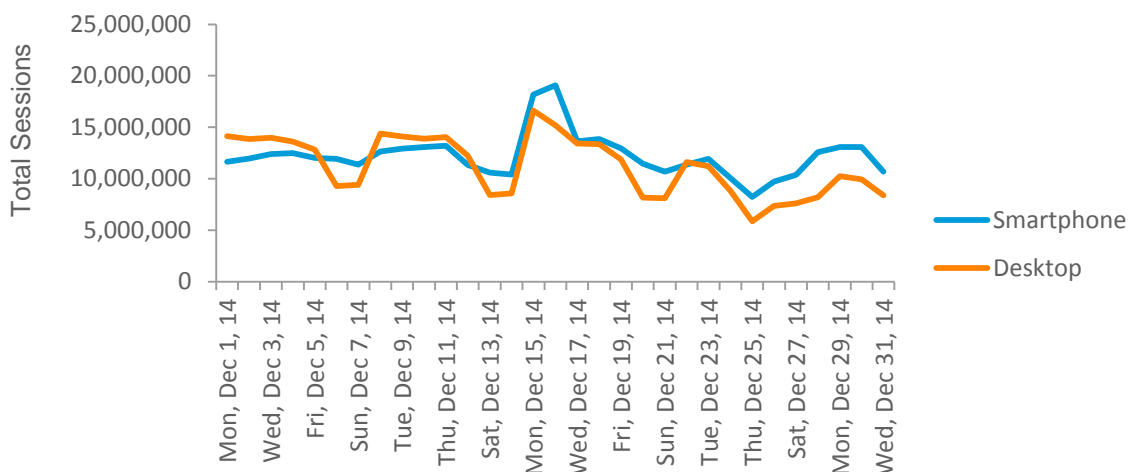


Daily traffic data for December shows a gradual drop-off of desktop usage from mid-month, and mobile usage increases as the holiday period approaches.

Notably, there is a jump for the entire market on December 15, largely attributed to coverage of the Sydney siege.

This is also reflected in the spike in total sessions, observable in both smartphone and desktop.

While average daily unique browsers for mobile rose, total sessions fell, showing that Australians were browsing more on their mobiles, for fewer sessions.



MOBILE PHONES DELIVER CHRISTMAS CHEER TO SMART SHOPPERS



Did you or someone you know use a mobile phone this Christmas to take photos of gift ideas or research an item? Most likely. **More than two-thirds, (67%) of Aussie smartphone owners used their mobile device for shopping related activities this festive season.**

During December 2014, almost half (44%) of all Australians with connected mobiles used their phone to search online for gift ideas in the lead up to Christmas.

Click [here](#) to learn more about Australian smartphone shoppers!

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 purple to yellow. Several colored dots (yellow, pink, red) are placed on the surface of the sphere, with thin lines extending from them towards the center of the sphere.

CATEGORY SPOTLIGHT: MASS MERCHANDISER & CLASSIFIEDS/AUCTIONS



TOP 10 MASS MERCHANDISER AND CLASSIFIEDS SITES

Within the **mass merchandiser** and **classifieds** categories, unique audience figures fell by 1% and 5% respectively. On average, Australians spent **8 minutes per session** browsing **mass merchandisers** and **11.6 minutes** on **classifieds/auctions**.

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

- **6** out of the **top 10 sites** have experienced growth in **unique audience**.
- **3** out of the **top 10** experienced **double digit increases** in terms of **sessions per person**, with **8** growing overall.

Sites	Unique Audience (000)	UA % change from November	Time Per Person (hh:mm:ss)	Sessions Per Person	SPP % change from November
eBay	7,171	-2.83%	01:53:24	10.26	+1.40%
Amazon	3,681	-1.79%	00:21:47	3.86	+3.71%
Gumtree	3,579	-6.55%	01:34:30	8.98	-16.19%
Woolworths	2,695	-0.92%	00:22:14	3.30	+7.40%
Coles	2,354	+13.12%	00:21:14	2.87	-4.90%
Target Australia	1,973	+15.79%	00:13:38	2.46	+6.20%
Woolworths HomeShop	1,814	+1.00%	00:26:26	3.26	+6.37%
JB Hi-Fi	1,756	+1.74%	00:15:15	3.10	+25.59%
Harvey Norman	1,751	+14.30%	00:10:33	2.15	+11.06%
BIG W	1,691	+3.11%	00:08:29	2.19	+16.66%

Note: The data is representative of surfing only.

An abstract graphic on the left side of the slide. It features a series of curved, overlapping lines in various colors (blue, green, yellow, red) that form a partial view of a sphere or a complex geometric shape. Several small, colored dots (yellow, green, purple, red) are scattered across the lines, with thin lines extending from them towards the right, suggesting a network or data points.

GENERAL UPDATES FOR THIS MONTH:

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 (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 side of the frame.

**NIELSEN EGENERATION REPORT IS
NOW PUBLISHED AND
AUSTRALIAN CONNECTED
CONSUMERS REPORT 2015
IS IN PROGRESS RIGHT NOW!**

THE AUSTRALIAN EGENERATION REPORT

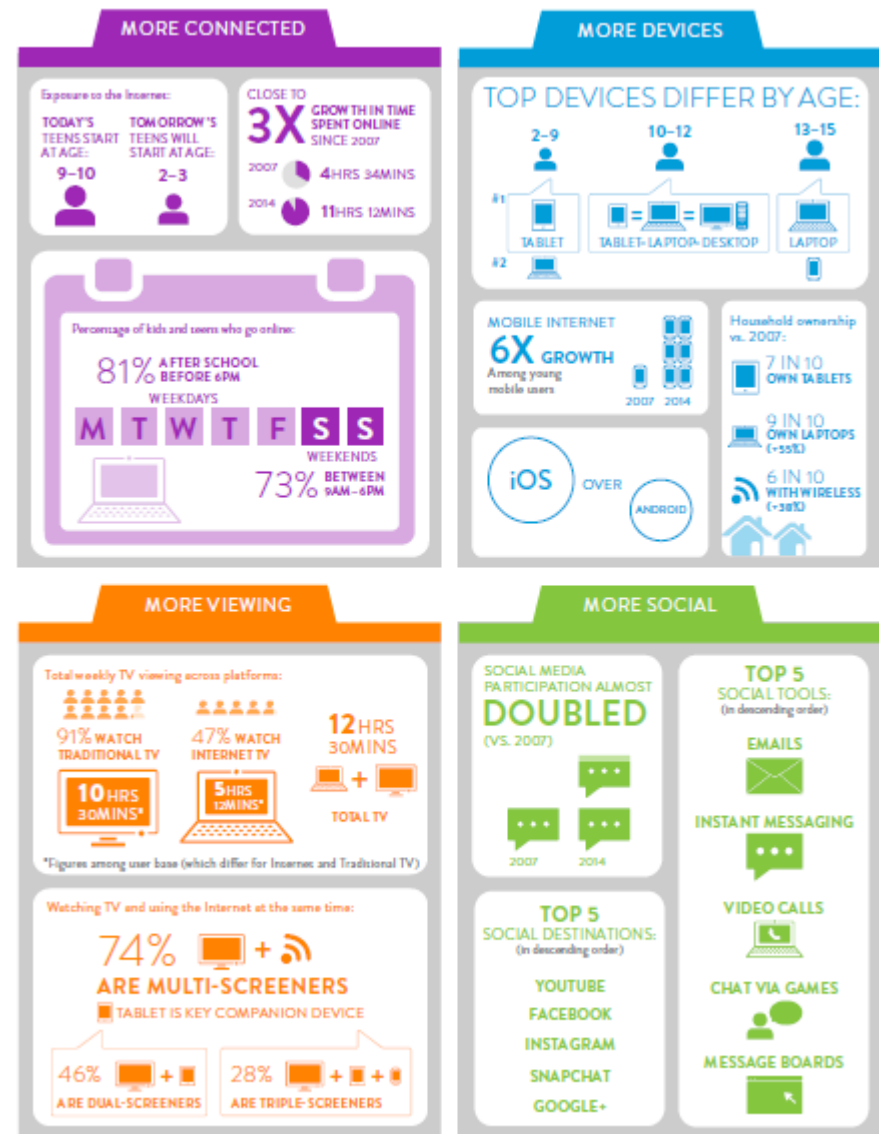
The Nielsen eGeneration report is a study of 2-15 year olds and their parents which was published in December 2014.

Ask your account manager if you would like a copy of this infographic for ready use in your own communications and presentations.

The detailed table of contents of the eGeneration report is also available if you'd like to understand all of the metrics covered in this study and how this insight can help your business.

Please reach out to your Nielsen Account Manager or contact Lillian.Zrim@nielsen.com for detail.

MEET TODAY'S CONNECTED KIDS AND TEENS



Source: Nielsen Australian eGeneration Report December 2014 - Connected Kids and Teens' Evolving Patterns of Media Consumption
 Note: Report is based on Online Australians 2-15 years (however comparisons to 2007 are for the age group 6-14 years)

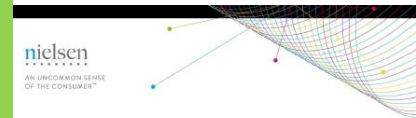
AUSTRALIAN CONNECTED CONSUMERS 2015

The fieldwork for Nielsen's annual *Australian Connected Consumers* study was conducted in December. Our researchers are now busy analysing and fusing the data to Consumer and Media View, ready for delivery to subscribers in March.

THE 2015 AUSTRALIAN CONNECTED CONSUMERS REPORT WILL PROVIDE INSIGHT INTO:

- The shift toward online sources of video – how brands can take advantage of this consumer trend
- Technology uptake and the resulting impact on consumer media and purchase behaviour
- Digitisation of the retail environment, retail strategy and loyalty. What is the impact on shopper behaviour and what are the opportunities?
- The 'multi-consumer': multiple devices, multiple screens, multiple channels, multiple platforms and media multi-tasking. What behaviours, roles and preferences are emerging?
- Evolving media consumption – we continue to track consumers' shift to digital sources of video, audio and text content. Where is consumption going and what opportunities does this offer your business?

Pre-subscription is still open, so if you've not yet signed up to receive the report, please contact your Nielsen Account Manager or email marie.jeanclaude@nielsen.com.



CRACKING THE CONNECTED CONSUMER CODE!

AUSTRALIAN CONNECTED CONSUMERS REPORT, 2015

EARLY BIRD OFFER ON NOW: SAVE \$2,000

TODAY'S CONSUMERS HAVE ACCESS TO MORE CHANNELS. MORE DEVICES. MORE CHOICES.
Your consumers now live in a world where their mobile and information devices are available on-demand and at their fingertips. They are increasingly gravitating toward content convenience and a plethora of connected screens, devices and platforms is affording them more choice than ever before.

The Nielsen Australian Connected Consumers Report 2015 is a one-of-a-kind industry tool to guide your business' marketing and media strategy in alignment with today's connected consumers.

Now in its 17th year, the report is invaluable to a diverse range of companies and brands – from media owners to advertisers alike – who use its insights to understand how to reach and talk to their audience at the right time and on the right platform.

CONNECT WITH YOUR MOST IMPORTANT CONSUMERS.
For the first time, the report is merged with Nielsen CMV (Consumer & Media View – our national survey of consumer identity, media and purchase behaviour), allowing you to define and optimize on specific buyer segments.

The fused database supports media and strategy planning, customer segmentation and market sizing analyses specific to your industry.

NEW DELIVERY OPTIONS.
A brand new set of delivery options have been designed to facilitate deep-dive analysis and customized workshops covering topics or audience segments of specific value to your business. See options overleaf.

SPECIAL EARLY BIRD PRICING.
Order in 2014 and enjoy our special early bird price – a saving of \$2,000!

ORDER EARLY AND TAKE PART IN QUESTIONNAIRE DESIGN.
Order your report before 10 November 2014 and get involved in the design of unique questions before we go to field.





nielsen
.....

AN UNCOMMON SENSE
OF THE CONSUMER™

CONTACT

careau@nielsen.com

www.nielsen.com/au/

(02) 8873 7000