



nielsen

THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

AUGUST 2015

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STATE OF THE ONLINE LANDSCAPE

August 2015

Welcome to the August 2015 edition of Nielsen's Online Landscape Review.

The online landscape in August saw Australians spend 35 hours online over 64 sessions; with 39 billion minutes spent online.

Ecommerce sites are seeing strong audience growth in the new financial year, with several sites experiencing their best month since August 2014, according to the latest Nielsen Online Ratings figures.

Insights:

- Rules For Engaging With The Australian Sport Fan
 - Just like we'd disown a family member who supported a rival team in the grand final, our sensitivities also mean brands need to understand who, how, when, what and why we're engaging with sport and sport related content in order to achieve real cut through.
- Jarryd Hayne's NFL Debut For San Francisco 49ers
 - With more than 13,000 Tweets being viewed over 2.7 million times by a unique audience of 193,000, sports fans around Australia jumped on Twitter to follow the real time commentary of all the big plays and key moments.

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





HIGHLIGHTS

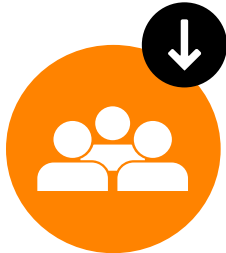
NIELSEN ONLINE RATINGS: HYBRID SURFING

AT A GLANCE: THE ONLINE LANDSCAPE

August 2015



39 billion minutes spent.



35 hours spent online, across **64 sessions** per person.



18,628,000 people were actively surfing online.



Indicates growth or decline based on the previous month

TOP 10 BRANDS AND THEIR ENGAGEMENT

August 2015

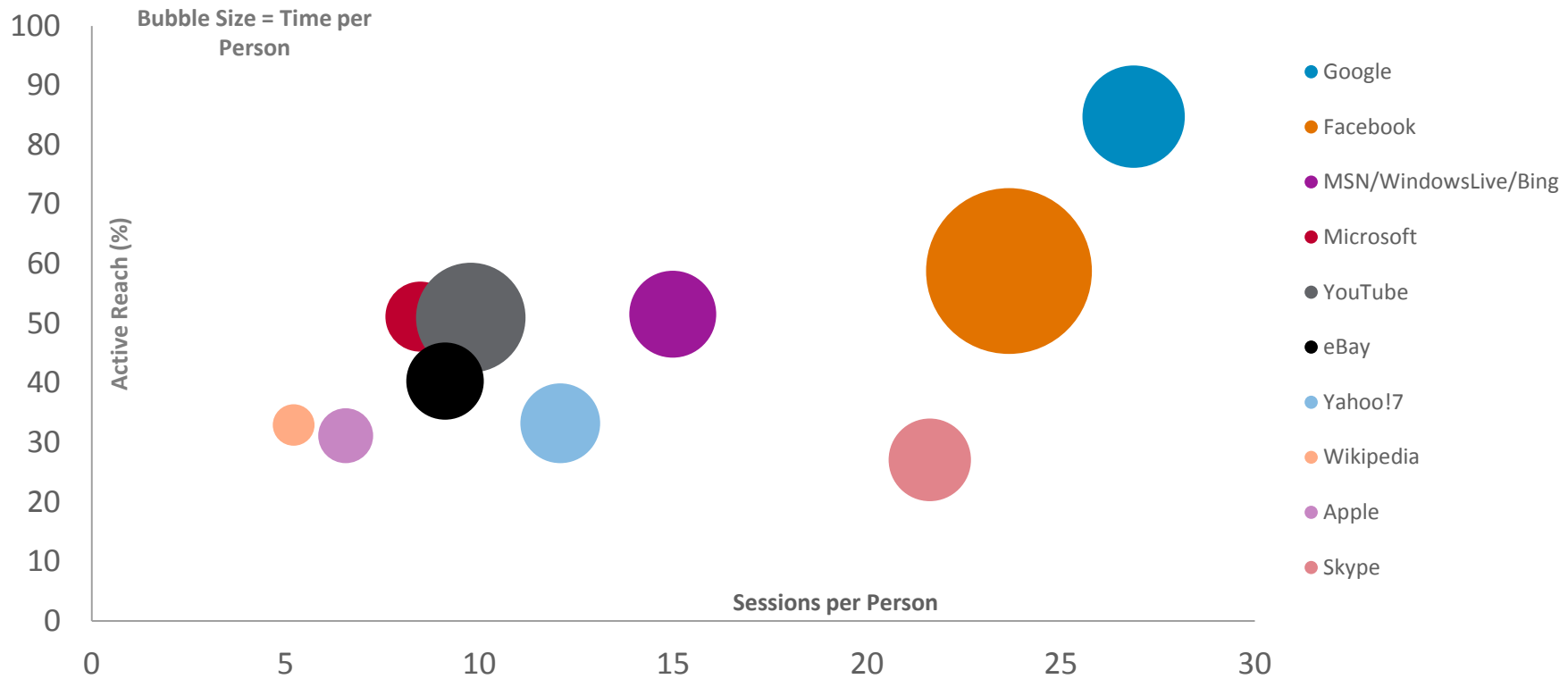
Unique Audience Rank	Brands	Unique Audience (000s)	Active Reach (%)	Sessions Per Person	Time Per Person (hh:mm:ss)
1	Google	15,789	84.76	26.87	02:40:18
2	Facebook	10,950	58.78	23.65	07:01:57
3	MSN/WindowsLive/Bing	9,598	51.52	14.98	01:55:36
4	Microsoft	9,527	51.14	8.47	01:14:50
5	YouTube	9,491	50.95	9.77	03:04:14
6	eBay	7,506	40.30	9.11	01:31:45
7	Yahoo!7	6,185	33.20	12.08	01:37:18
8	Wikipedia	6,131	32.91	5.20	00:26:36
9	Apple	5,797	31.12	6.55	00:46:03
10	Skype	5,037	27.04	21.61	01:44:31

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, August 2015

TOP 10 BRANDS AND THEIR ENGAGEMENT

August 2015



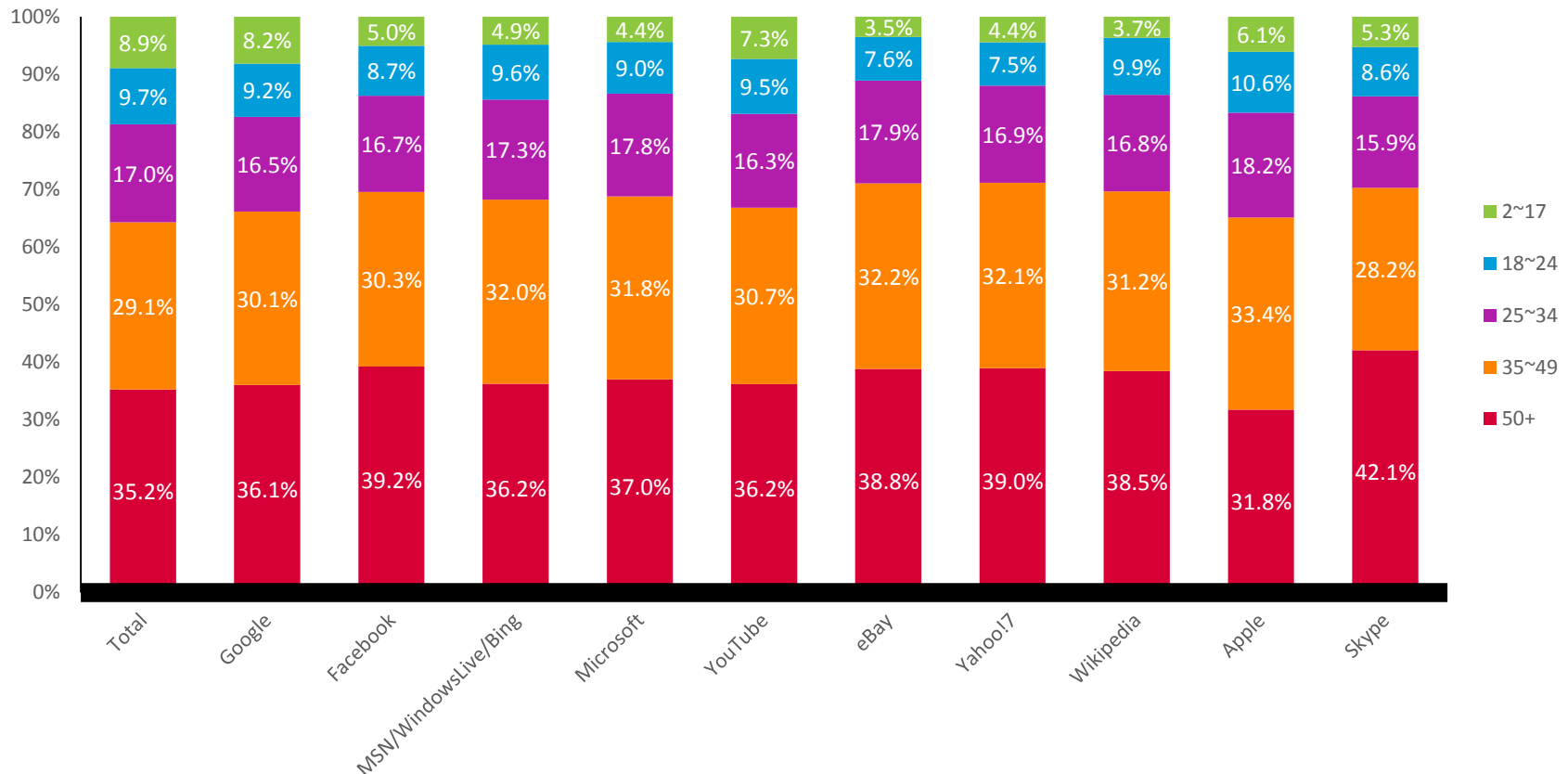
8 out of the top 10 sites experienced an increase in engagement across all key metrics during August.

Skype experienced an increase of 11% in active reach this month. This growth may be influenced by the implementation of Skype for Business in the Office suite as well as the rollout of Windows 10.

Yahoo!7 also experienced growth in their sessions per person and time per person metrics at 5.6% and 9.1% respectively.

TOP 10 BRANDS BY AGE

Unique Audience (Surfing): August 2015



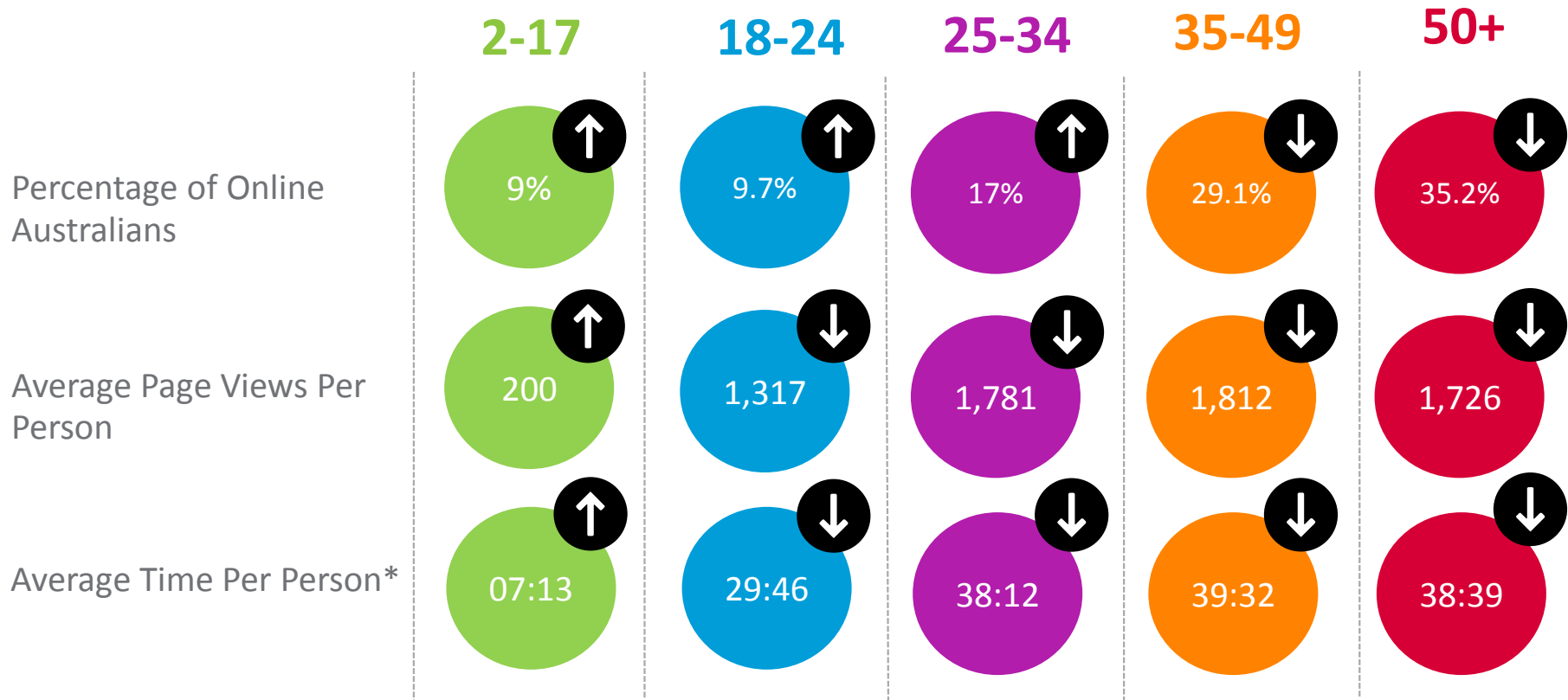
Skype held the highest skew towards those aged 50+ this month at 42.1%.

Apple audience this month held the highest proportions of those aged 18-49. Notably, 1 in 10 of their audience was aged 18-24, almost 1 in 5 of their audience was aged 25-34 and 1 in 3 Australians who surfed the Apple website were aged between 35-49.

Google and Youtube had the highest skew towards the Australians aged 2-17 years old at 8.2% and 7.4% respectively.

HYBRID SURFING: DEMOGRAPHICS

The active online audience in Australia during August 2015 can be broken down as follows:



3 out of the 5 age groups experienced increases this month.

Australians aged 2-17 were more engaged this month. Notably, they spent an extra 45 minutes per person surfing.

↑ ↓ Indicates growth or decline based on the previous month

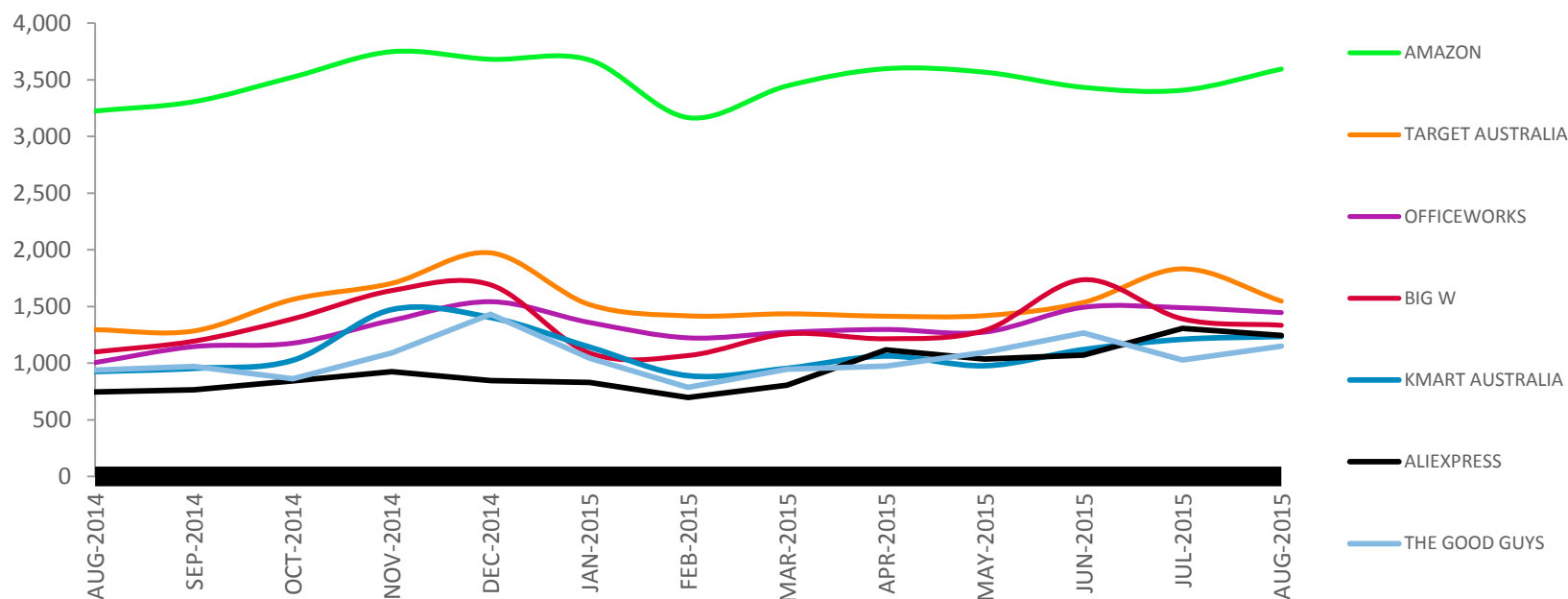
*HH:MM



CATEGORY SPOTLIGHT: E-COMMERCE

SUCCESS FOR RETAILER INVESTMENT IN ECOMMERCE

Unique Audience (000s): August 2014 – August 2015



Ecommerce sites are seeing strong audience growth in the new financial year, with several sites experiencing their best month since August 2014.

Ecommerce market leader Amazon continued to grow its audience, with a unique audience of 3.59 million throughout August compared to 3.39 million in July; an increase of 199,000 people.

Investment in ecommerce by large retailers is proving successful for many, with major retailers including Target, Office Works, Big W, Kmart, Ali Express and the Good Guys all showing growth of more than 200,000 people from the same time last year.

For more insights, click [here](#).

TOP 3 E-COMMERCE SITES

Fig. 1 - Shared Unique Audience (000s) August 2015

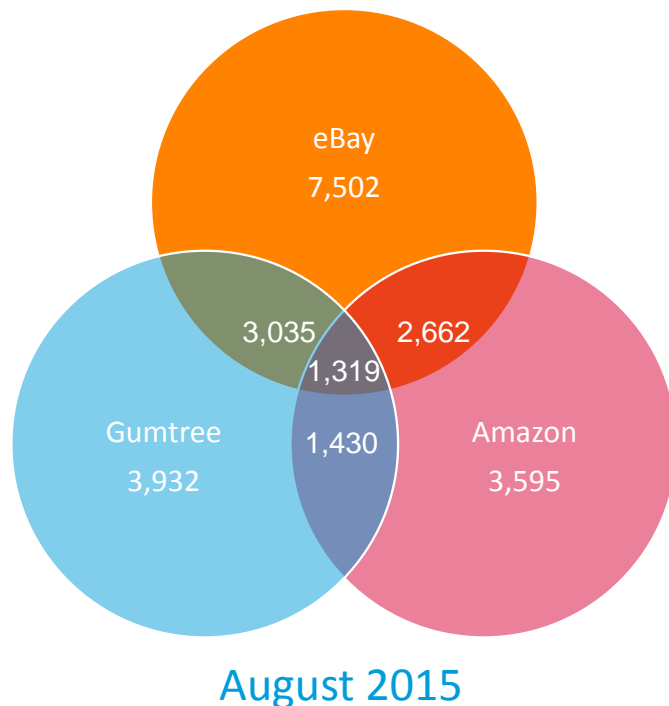
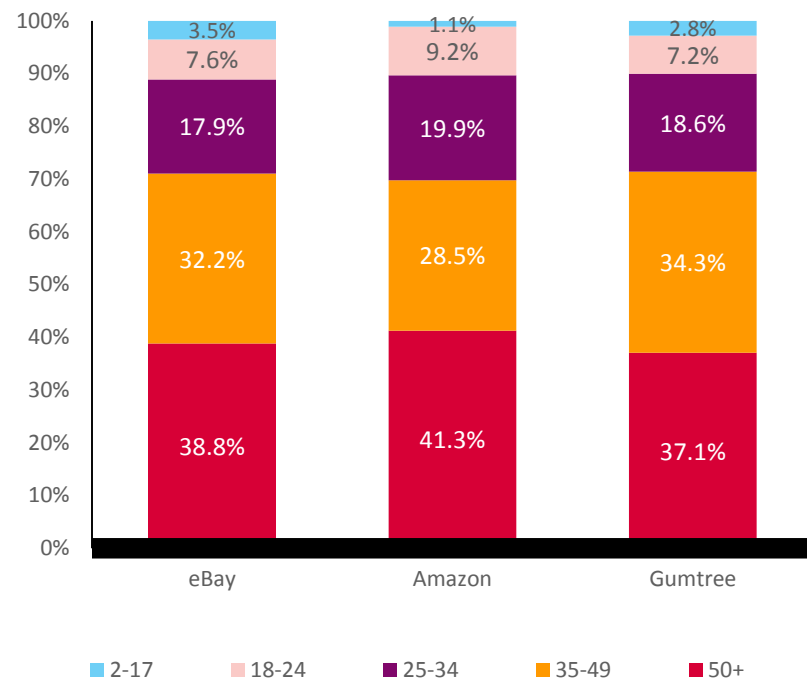


Fig. 2 - Unique Audience (000s) August 2015



Classifieds/auctions sub-category leader eBay also achieved its largest audience in 12 months, with a unique audience of 7.5 million, an increase of 531,000 people from the month prior.

77% of people who visited Gumtree also visited eBay at 3 million Australians, with shared audience between Gumtree and Amazon reaching 1.4 million people. Meanwhile, 1.3 million people browsed all three.

Amazon has the highest proportion of those aged 18-34 and 50+, while 1 in 3 Australians who browse Gumtree are aged between 35-49 years old.

HIGHLIGHTS

NIELSEN ONLINE RATINGS: HYBRID STREAMING

HYBRID STREAMING KEY ONLINE STATISTICS

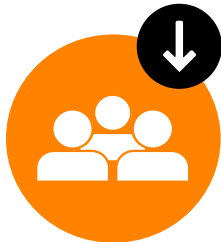
August 2015



3.3 billion streams watched.



6 billion minutes streamed.



7 hours and 18 minutes spent streaming per person.



13,706,000 people were actively streaming online.



Indicates growth or decline based on the previous month

HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

August 2015

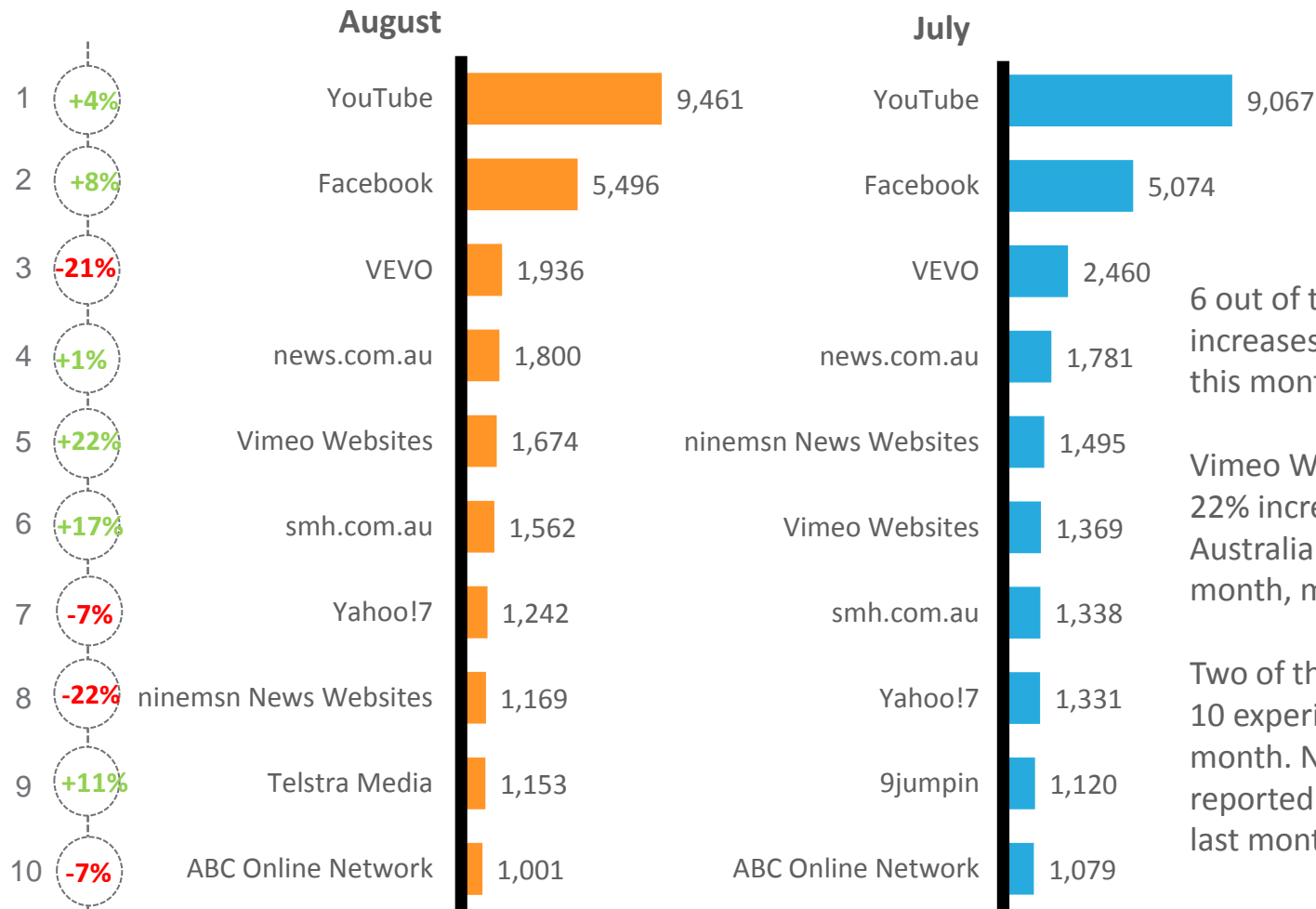
Unique Audience Rank	Brand	Unique Audience (000s)	Total Streams (000s)	Time Per Person (hh:mm:ss)
1	YouTube	9,461	1,881,721	05:06:06
2	Facebook	5,496	183,610	01:38:55
3	VEVO	1,936	56,698	00:34:25
4	news.com.au	1,800	11,561	00:05:33
5	Vimeo Websites	1,674	6,270	00:12:40
6	smh.com.au	1,562	5,455	00:04:13
7	Yahoo!7	1,242	15,603	00:37:26
8	ninemsn News Websites	1,169	12,436	00:08:22
9	Telstra Media	1,153	8,853	00:34:08
10	ABC Online Network	1,001	8,949	02:02:24

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, August 2015

TOP BRANDS COMPARISON – HYBRID STREAMING

August 2015, Unique Audience (000s)



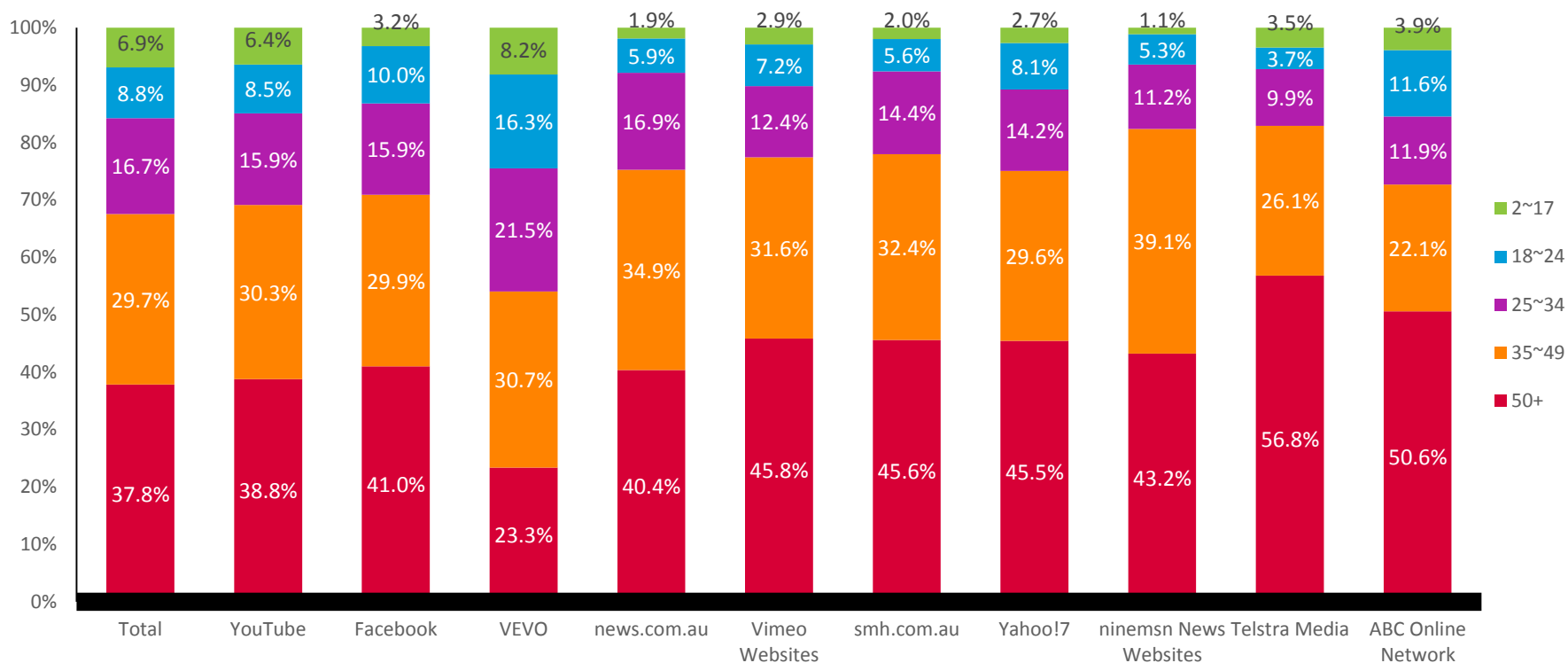
6 out of the top 10 sites reported increases in Unique Audience this month.

Vimeo Websites experienced a 22% increase in streaming Australians in comparison to last month, moving to 5th place.

Two of the news sites in the top 10 experienced increases this month. Notably, smh.com.au reported a boost of 17% from last month.

TOP 10 STREAMING BRANDS BY AGE

Unique Audience (Streaming): August 2015

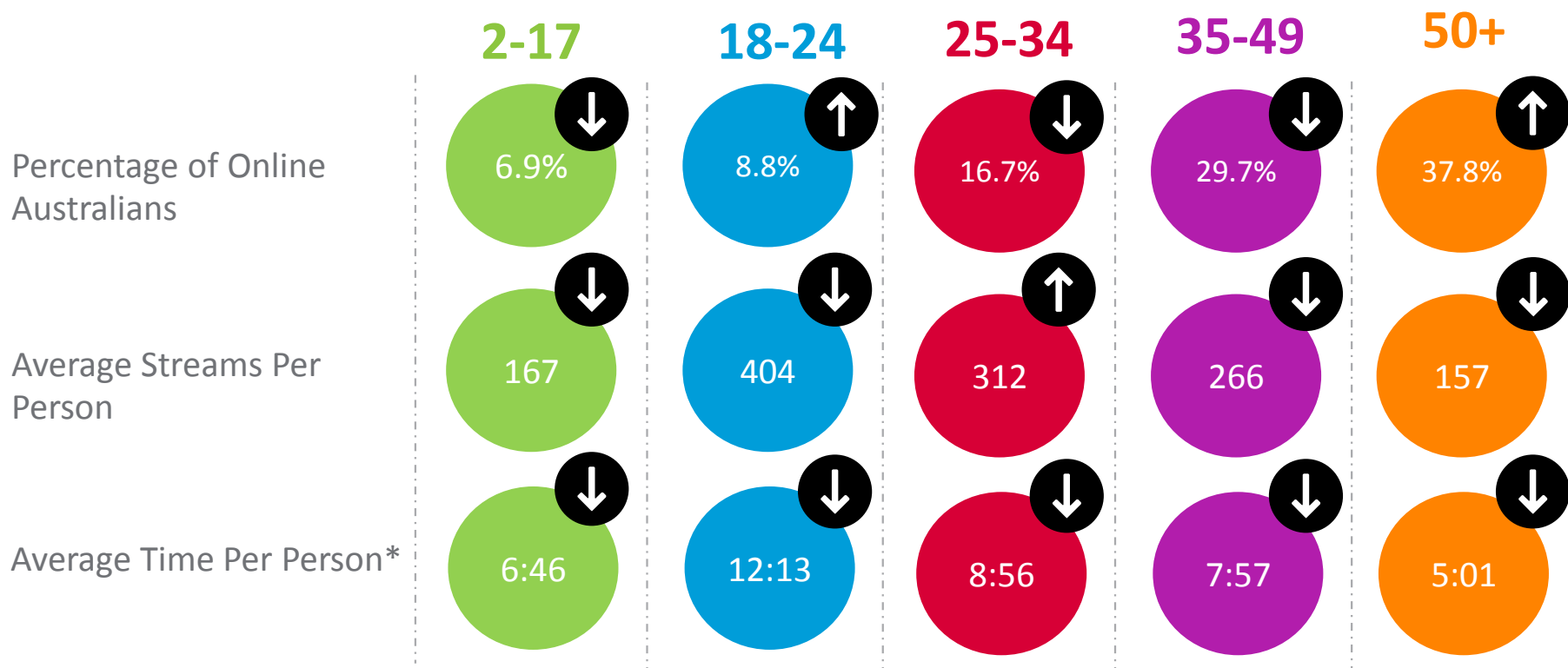


Telstra Media had the highest skew towards those aged 50+ this month, with over half of their audience sitting in that age group.

ninemsn News Websites had the highest skew towards those aged 35-49 at 39.1%. Meanwhile, VEVO retained its heavy skew towards the younger demographic, with almost half their audience (46%) below the age of 34.

HYBRID STREAMING: DEMOGRAPHICS

August 2015



3 out of the 5 age groups experienced increases this month.
 The unique audience composition of 18-24 and 50+ year olds increased to 8.8% and 37.8% respectively.
 In addition, those aged 25-34 increased to 312 streams per person this month.

↑ ↓ Indicates growth or decline based on the previous month

*HH:MM

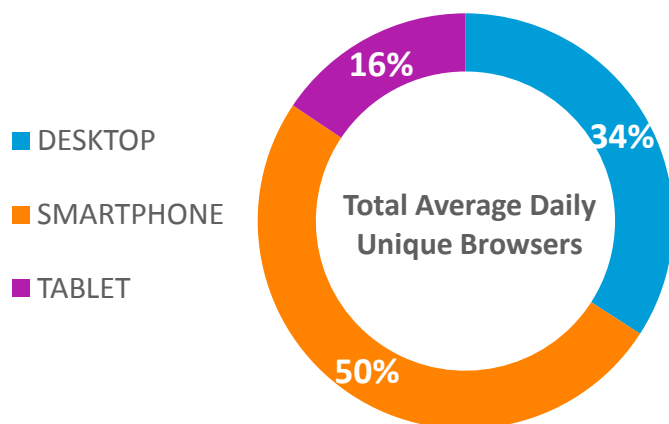


DEVICE HIGHLIGHTS

NIELSEN ONLINE RATINGS: MARKET INTELLIGENCE

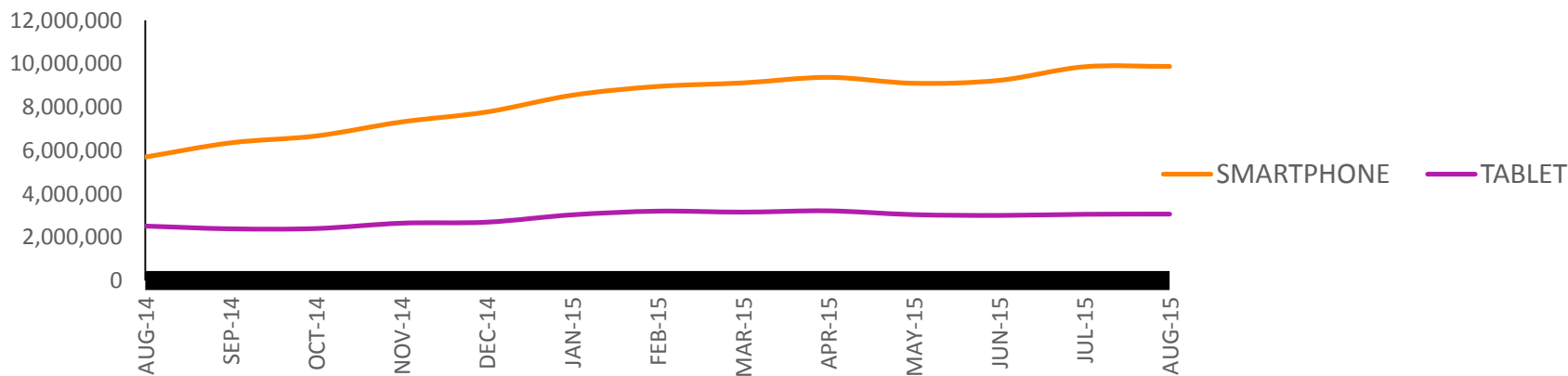
SITES ARE BROWSED MORE ON PORTABLE DEVICES

August 2015 – Market Domain – Domestic Traffic



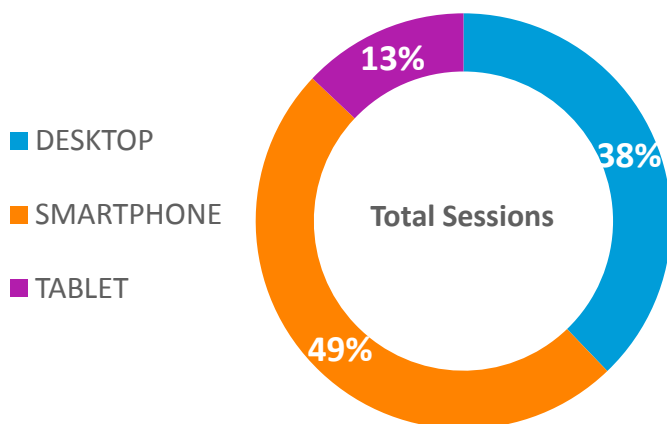
66% of total average daily unique browsers came from portable devices.

58% increase since August 2014 in total average daily unique browsers from portable devices



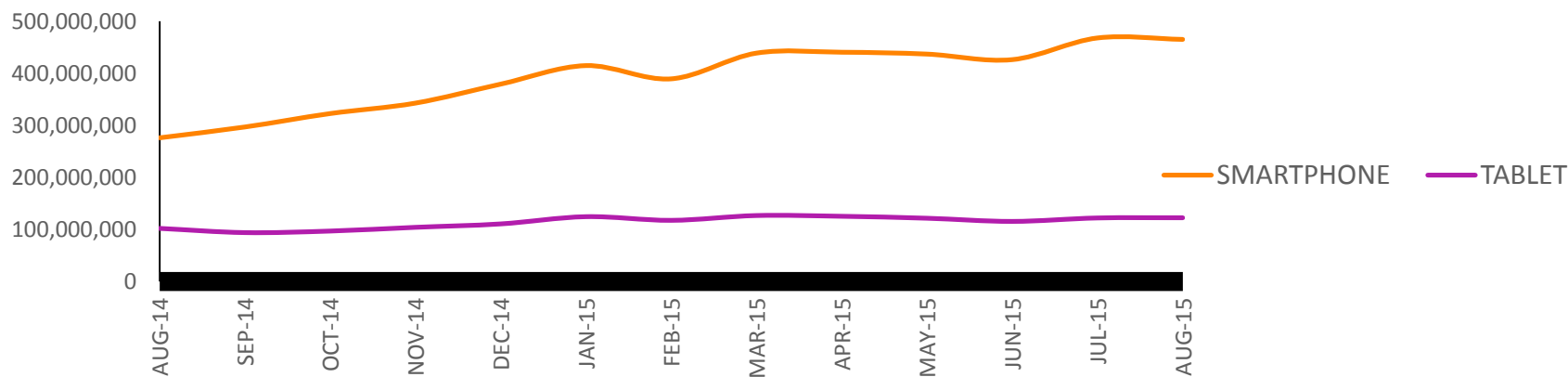
SESSIONS ON PORTABLE DEVICES HAS GROWN 55% IN A YEAR

August 2015 – Market Domain – Domestic Traffic



62% of total online sessions came from portable devices

55% increase since August 2014 in total online sessions from portable devices





GENERAL UPDATES FOR THIS MONTH:



RULES FOR ENGAGING WITH THE AUSTRALIAN SPORT FAN

COMPANIES THAT SUPPORT AND INVEST IN SPORT ARE GOOD!

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36% FEEL MORE POSITIVE ABOUT COMPANIES THAT INVEST IN AUSTRALIAN SPORT



34% FEEL PROUD WHEN COMPANIES HAVE A RELATIONSHIP THAT SUPPORTS AUSTRALIAN SPORT

• Base: 18,404,000 Australians 18+ | Source: Sports + CMV recontact study, July 2015

For more sport insights, click [here](#).



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**IN THE FIRST HALF OF THE
YEAR, 5.7 MILLION
TWEETS ABOUT SPORT TV**

(48% of all TV related tweets)

- Source: Nielsen Twitter TV Ratings, August 2015

For more sport insights, click [here](#).

Sport. It's the lifeblood of Australian culture; we watch it, we play it, we talk about it, and we love companies that support Australian sport.



SEGMENTATION IS KEY

86% of us say we're interested in sport, so the fan base is big, but our drivers for engagement differ wildly. Deep segmentation into demographics, locality, preferred teams, attitudes to sport and levels of fandom will offer more insight and information than just audience figures provide.



BUILD ONLINE

Online engagement among Australians is skyrocketing, and sport content is one of the major growth verticals. According the Australia Connected Consumer Report, 58% of consumers said sport is their favourite TV genre that they read articles, reviews and looked at photos about online – higher than any other genre.



GET SOCIAL

In the first half of the year, 11.9 Million tweets were posted about TV. Of those 5.7 Million Tweets were about Sport on TV – accounting for just under half (48%) all TV related tweets (just below the U.S. at 50%). Most tweets per minute for a sporting event this year was the Asia Cup Final: Aus vs South Korea. Peaking at 3,233 tweets per minute at 22.29pm.

For more sport insights, click [here](#).



NIELSEN TWITTER TV RATINGS: JARRYD HAYNE



NFL 49ERS vs. VIKINGS

NIELSEN TWITTER TV RATINGS (AUSTRALIA)



SF vs. MIN
15/09/2015



ESPN



UNIQUE
AUTHORS

5.9K



TWEETS

13.3K



IMPRESSIONS

2.7M



UNIQUE
AUDIENCE

193.3K

@ TOP RETWEET

@JarrydHayne_1

"Great to get the win tonight. Can't thank enough people for helping & encouraging me through this..."

Jarryd Hayne's highly anticipated 49ers debut on 'Monday Night Football' was the number one program on Nielsen Twitter TV Ratings during the day of play.

With more than 13,000 Tweets being viewed over 2.7 million times by a unique audience of 193,000, sports fans around Australia jumped on Twitter to follow the real time commentary of all the big plays and key moments.

For more Twitter insights, click [here](#).



NIELSEN TWITTER TV RATINGS: MONTHLY TOP 5

NIELSEN TWITTER TV RATINGS

Nielsen Twitter TV Ratings - August, 2015

Monthly Top Five - Sport



Rank	Network	Program	Date	Unique Audience	Impressions
1	GEM	The Ashes: Fourth Test Day 1 Australia v England	06/08/15	182.1K	4.4M
2	*SEVEN, FOXFOOTY	AFL Sydney v Adelaide	01/08/15	152.3K	1.6M
3	*FOXSPORTS4, TEN	Netball World Cup Final Australia v New Zealand	16/08/15	151.2K	1.1M
4	FOXSPORTS3	USPGA Championship Final Round	17/08/15	142.2K	1.5M
5	GEM	The Ashes: Fourth Test Day 3 Australia v England	08/08/15	142.8K	1.6M

Source: Nielsen Australia. Rankings based on Unique Audience. Unique Authors and Tweets are a measure of relevant Australian Twitter activity from three hours before through three hours after broadcast, local time. Reach metrics (Unique Audience and Impressions) measure the audience of relevant Tweets ascribed to a program from when the Tweets are sent until the end of the broadcast day at 5am. For simulcast events the metrics reflect the highest Unique Audience across all airing networks and is denoted with an asterisk.

NIELSEN TWITTER TV RATINGS

Nielsen Twitter TV Ratings - August, 2015

Monthly Top Five - Non Sport



Rank	Network	Program	Date	Unique Audience	Impressions
1	MTV	2015 MTV Video Music Awards	31/08/15	157.4K	1.6M
2	NINE	The Voice (Grand Finale)	30/08/15	90.2K	1.2M
3	TEN	The Bachelor Australia	12/08/15	81.2K	1.2M
4	TEN	The Bachelor Australia	13/08/15	80.8K	939.6K
5	TEN	The Bachelor Australia	05/08/15	79.3K	1.3M

Source: Nielsen Australia. Rankings based on Unique Audience. Unique Authors and Tweets are a measure of relevant Australian Twitter activity from three hours before through three hours after broadcast, local time. Reach metrics (Unique Audience and Impressions) measure the audience of relevant Tweets ascribed to a program from when the Tweets are sent until the end of the broadcast day at 5am. Non-sport includes live/new episodes only.

An abstract graphic in the bottom-left corner of the slide. It features a series of concentric, overlapping arcs in various colors (blue, red, green, yellow, purple) that form a stylized representation of a globe or a network. Several small, colored dots (blue, red, green, yellow, purple) are scattered across the arcs, with thin lines extending from them towards the right side of the slide.

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AN UNCOMMON SENSE
OF THE CONSUMER™

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