

THE MOBILE STORY

NIELSEN MOBILE RATINGS

**IAB AUSTRALIA AND NIELSEN, SMARTPHONE
AND TABLET AUDIENCE MEASUREMENT**

AUSTRALIA, JULY PREVIEW DATA 2015

nielsen + **iab.**
..... australia

A FIRST LOOK

IAB Australia and Nielsen are delighted to share with you the first Mobile Story report, drawing insights from the first official release of industry-supported smartphone and tablet ratings preview data (Mobile Ratings) for the Australian market. This report is an important milestone in this particularly complex area of measurement and it marks yet another significant step forwards in measuring the digital media landscape in Australia.

With over 15 million Australians now owning a smartphone and some 12 million owning a tablet device, it's critical that the industry has access to audience measurement data which quantifies the importance of mobile media audiences and helps to inform marketing investments.

Over the past 18 months, there has been a significant amount of work and investment by Nielsen, the IAB Australia and the digital industry to build quality panels to measure smartphone and tablet users. The panels provide data on a monthly basis that can be used by media buyers and sellers to better understand the mobile consumer and assess the opportunities available in what is now a significant media channel. This report provides a first look at these results based on the mobile panel which consists of 2,000 smartphone users and 500 tablet users aged 18+.

The release of Mobile Ratings is the first phase of a major upgrade to the digital measurement system in Australia which includes the following key dates:

- Mobile Story report (August data) – October 2015
- Mobile Story report (September data) – November 2015
- Digital Ratings (Monthly) – early 2016
- Digital Content Ratings (Daily) – mid 2016

These future developments will also bring methodological enhancements to help provide additional granularity and detail in the dataset. This will include data on in-app activity to help the market understand the range of content being consumed within applications that aggregate content from a range of publishers.

We anticipate that publishers and agencies alike will gain considerable insights from this report and we look forward to continuing to work closely with the industry to ensure Australia remains at the forefront of digital audience measurement globally.

KEY TAKEOUTS

The Mobile Universe - insights into mobile sessions

- In July 2015, 12.5 million Australians 18+ accessed the internet on their smartphone and 7.4 million on their tablet.
- Australians 18+ spend more time on smartphones than any other digital device, with just over 33 hours per person per month spent browsing or using apps.
- Australians 18+ spend just over 29 hours per month using apps on their smartphones and just over four hours browsing the web.
- Mobile devices drive shorter and more frequent sessions than on desktop/laptop PCs. Content needs to be easy to digest at a glance, and consumable on the go.
- Growth opportunities still exist for smartphone engagement in Australia, as demonstrated by the US market which sees almost 10 hours more time spent on apps and 3 hours more on web per month.

Entertain, educate or excite me – getting consumer attention on mobile

- Google and Facebook entities lead audience rankings on both smartphone and tablet across the Parent, Brand and App levels.
- Entertainment, Social and Search categories generate the largest audiences on smartphones and tablets.
- Gaming, Messaging, Music, Travel and Video/Movies categories all have larger audiences on smartphone than on desktop.
- Social, Entertainment and Gaming drive the most time spent on smartphone and tablet.
- Current Events and Global News category is dominated by the same brands that have historically been strong on desktop (news.com.au, smh.com.au). Though some brands like Yahoo7 News Websites and The Daily Telegraph hold stronger smartphone rankings relative to their desktop rank.

Keeping consumers engaged

- Australians 18+ are spending over 10 hours per month on average engaging with Entertainment content on their smartphone or tablet.
- Over four hours is spent engaging with audio / video content on smartphones each month, and just under two hours on tablet. A lot of this viewing is occurring on YouTube.
- For the month of July 2015, 4.9m Australians 18+ used sports services on their smartphone and 2.5m on their tablets.
- Australians 18+ spent 1 hour 19 minutes browsing Commerce & Shopping (Retail) content on their smartphones and 1 hour 3 minutes on their tablets.
- The health category is performing strongly on smartphones, with Fitbit and MyFitness Pal having frequent and engaged audiences.

Mobile mirrors desktop – understanding advertising categories

- The three leading classifieds categories for desktop – jobs, cars and real estate – continue to deliver strong audiences on mobile, with Seek, Carsales and realestate.com.au leading their fields.



ABOUT NIELSEN MOBILE RATINGS

In 2014, Nielsen, with funding from IAB Australia and leading digital publishers, built the first metered mobile panel in Australia consisting of 2,000 iOS and Android smartphones and 500 iOS and Android tablets. This panel is nationally representative of Australian smartphone and tablet internet users, has individual privacy agreements in place with all panellists and passively measures the online behaviour of panellists on their mobile device through an on-device meter (Android) or proxy solution (iOS).

This panel is a vital first step in providing the Australian market with key insights into mobile audiences by directly measuring the actual behaviour of Australian people 18+ on their smartphones and tablets.

Giving a complete and independent view of mobile media consumption, Nielsen Mobile Ratings enables you to:

- Understand ACTUAL audience behaviour on mobile media.
- Track performance of mobile apps and sites against competitors and over time.
- Identify the best apps and sites to reach a sizeable.

On its own, the Nielsen Mobile Ratings data is not designed to provide the market with the final mobile trading currency. It will, however, be a vital first step in understanding mobile audiences and a fundamental input into our more comprehensive digital content and advertising measurement solutions:

1. Nielsen will use the smartphone and tablet panel data as a fusion input along with our home/work PC panel data and tagged website data to create a new service named **Digital Ratings Monthly**, launching late 2015/early 2016. This service will provide total audience measurement for a website or app, as well as separate audiences split out by PC, smartphone or tablet devices.
2. Nielsen will use the smartphone and panel data in conjunction with a large scale panel provider to underpin **Mobile Digital Ad Ratings**, launching later this year. This service will provide total audience measurement for a digital campaign as well as separate audiences split out by PC, and mobile devices.

It is important that the industry appreciates that Nielsen Mobile Ratings preview data will not report on in-app content consumption. It is designed to report on audiences visiting and using an app. Any content consumed in-app is credited to the app being used and not the publisher or owner of the content. This issue is difficult to resolve when using a panel-only methodology, however daily **Digital Content Ratings**, launching in 2016, and the corresponding introduction of our Software Development Kit (SDK) will solve for this issue.

Recommendations on how to use Nielsen Mobile Ratings Pilot data:

- Unique Audience is the lead metric to be used for rankings and understanding relativity.
- Understand the size of the total smartphone or tablet market, including Unique Audience by device (smartphone/tablet).
- For category analysis, including:
 - Overall category/subcategory audience by device (smartphone/tablet)
 - Browsing vs app audience by device
- To determine Unique Audience rankings, including:
 - Identification of the range of content consumed & number of sites/apps with significant audience size.
 - Top Parents/Brands/Apps by Unique Audience

Due to a reliance on panel-only measurement for Mobile Ratings, time metrics have not been included at the entity level due to high likelihood of understatement. Category level time metrics have however been included as sample size is sufficiently robust.

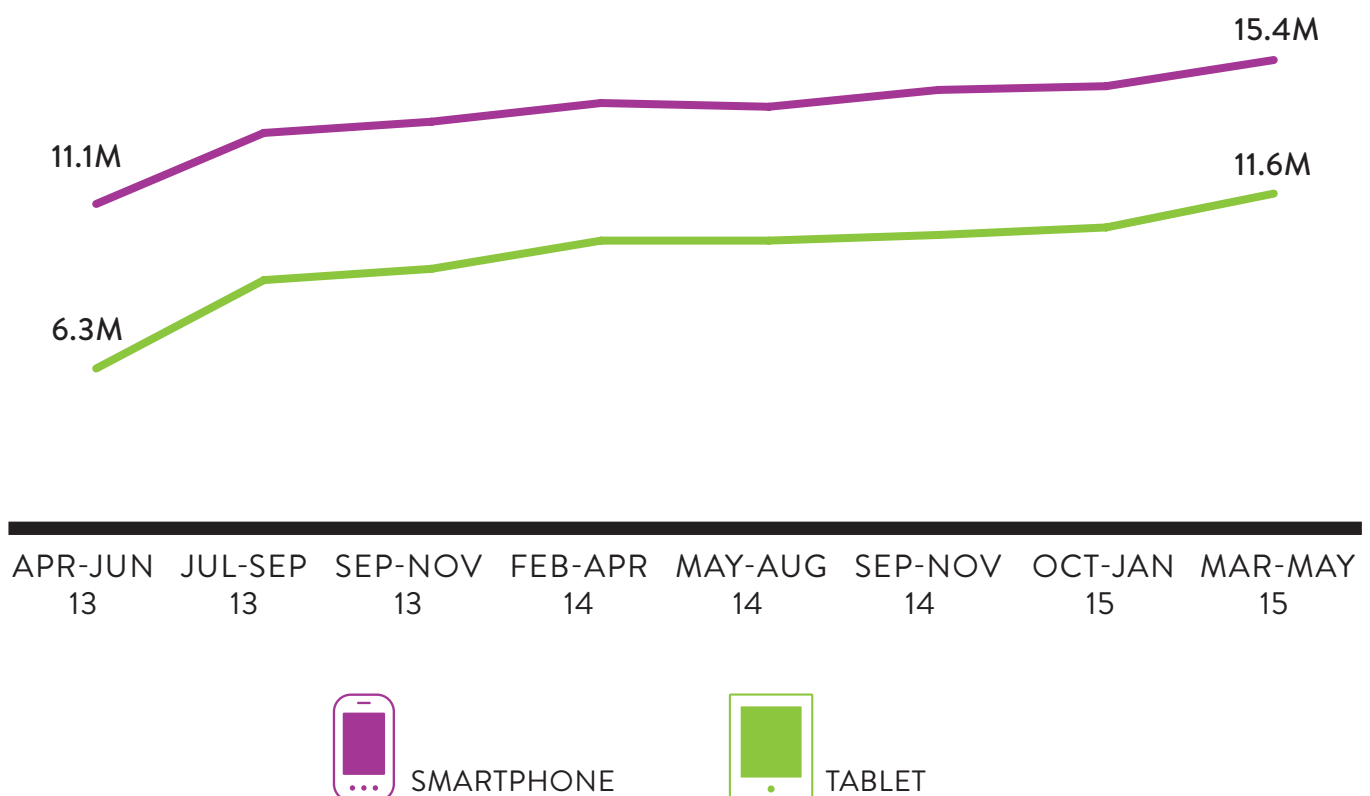
Audience metrics by device in Nielsen Mobile Ratings Pilot data are not summable as we are not yet accounting for cross-device duplication. This means that adding the smartphone audience to the tablet audience will not give you total mobile audience. Additionally, adding smartphone or tablet audience to PC audience (from Nielsen Online Ratings) will not give you a total cross-device audience. The capability to de-duplicate audiences across devices, as well as Operating System (iOS/Android) level data, will come with the launch of Digital Ratings Monthly later this year.

Finally, entities with small or insufficient sample size are noted throughout the report by an asterisk (*). These entities do not meet minimum sample size standards and may exhibit significant variability month-to-month.

SMARTPHONE OWNERSHIP CONTINUES TO RISE

There has been a 39% increase in people aged 14+ owning smartphones and an increase of 83% for tablet ownership over the last two years. Although there has been a slowdown in growth as penetration reaches high levels, growth is still occurring both in ownership and time spent across smartphones and tablets.

SMARTPHONES AND TABLET OWNERSHIP



Source: IAB Australia/Nielsen Online Ratings Establishment Survey people aged 14+

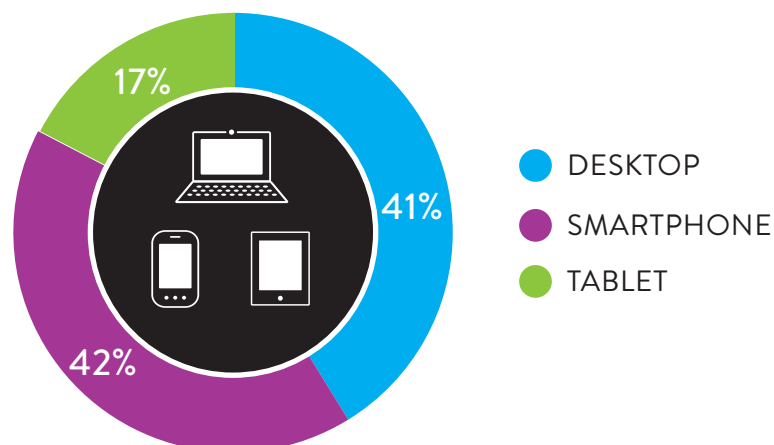
AUSTRALIANS SPEND MORE TIME ON SMARTPHONES THAN OTHER DIGITAL DEVICES

Average time per person spent either browsing or on applications for the active internet population is highest on smartphones, followed by desktop and then tablets.

	TIME PER PERSON PER MONTH
SMARTPHONE	33 hrs 13 mins
DESKTOP	29 hrs 5 mins
TABLET	23 hrs 41 mins

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+); Nielsen Online Ratings (Ppl 2+)

TOTAL TIME - MONTHLY JULY 2015



Source: Nielsen Mobile Ratings Preview Data (Ppl 18+); Nielsen Online Ratings (Ppl 2+)

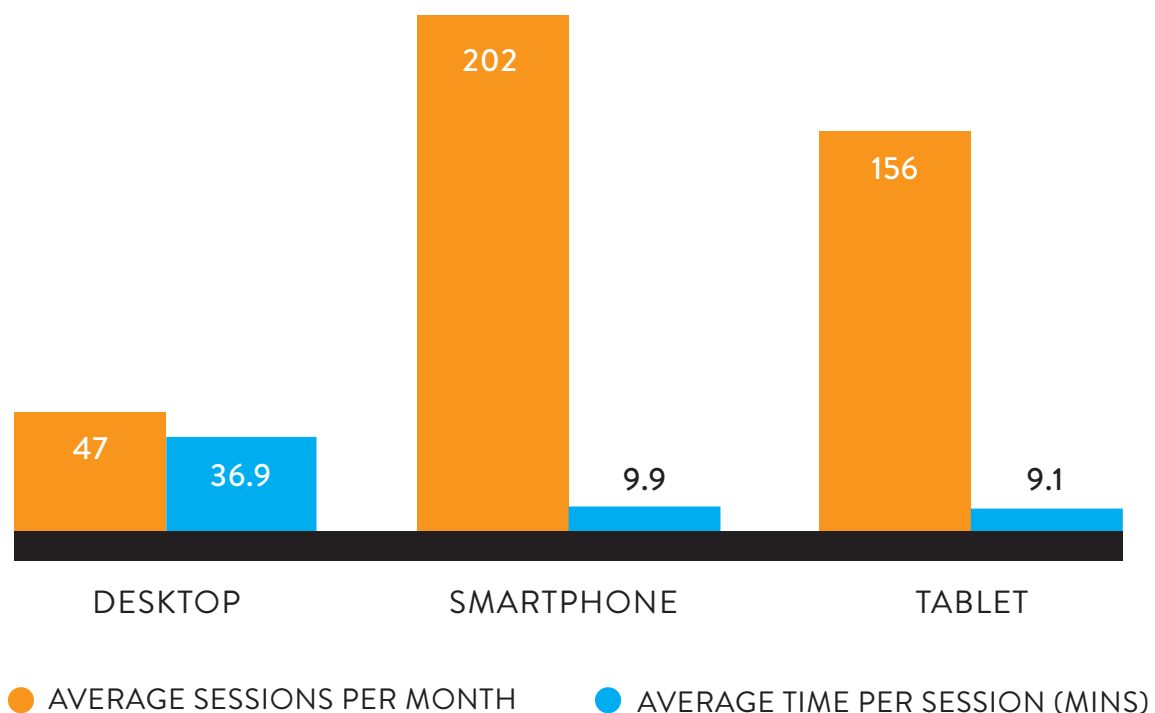
The overall digital time pool has desktop and phone total minutes almost on par, with tablets contributing 17% of digital time.

MOBILE DEVICES DRIVE SHORTER AND MORE FREQUENT SESSIONS

People are using mobile devices in shorter and more frequent sessions than their desktop. Interestingly, even though tablet content consumption differs from smartphones, the overall frequency and length of sessions is quite similar. Smartphone sessions are less than one third the length of desktop sessions but more than three times as frequent.

Although smartphone and tablet sessions are considerably shorter than desktop sessions – at over nine minutes per session – it is a significant amount of time, often across a range of activities, especially when considering the high frequency of sessions. It is expected that this frequency will continue to increase.

MOBILE DEVICES GENERATE MORE SESSIONS, WITH SHORTER DURATION





Source: Nielsen Mobile Ratings Preview Data (Ppl 18+); Nielsen Online Ratings (Ppl 2+)

AUSTRALIAN SMARTPHONE ENGAGEMENT STILL HAS ROOM TO GROW

As we have seen in previous Nielsen research released in this market, although Australia is seeing impressive growth in smartphone usage, it continues to trail other leading markets in relation to time spent browsing and using applications. U.S. application time is just over nine hours more per month than in Australia. The difference in browsing time is even more dramatic with the U.S. nearly double what we are currently witnessing in Australia.

SMARTPHONE TIME COMPARISON

		TIME PER PERSON (HH:MM:SS)
 AUSTRALIA	APP	29:02:01
	BROWSER	4:10:34
 U.S.	APP	38:15:36
	BROWSER	7:17:53

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+) (AU); Nielsen Mobile Ratings (Ppl 18+) (US)

CONTENT CATEGORY USAGE—U.S. VS AUSTRALIA

U.S. consumers are using a broader range of content and utilities, however there are a few categories where Australia is seeing higher reach and usage than the U.S.:

- **GOVERNMENT** – Government services on smartphones in Australia are not currently as strong as desktop however it is higher than in the U.S. Monthly reach of smartphone users for government sites is only 40% in the U.S. vs 44% in Australia. Most visited government properties for Australians include Department of Human Services, Bureau of Meteorology, ATO and a range of state-based transport services.
- **AUTOMOTIVE** – Australia has always been a leader in aggregating classified audiences and it is no different on smartphones. Active monthly reach for automotive sites and applications in Australia is currently 19% vs 17% in the U.S., with Australian brands being led by Carsales and followed by Gumtree and Carsguide.
- **FINANCE** – 75% of Australian smartphone users are connecting to financial services or information every month vs 57% of Americans. Australian banks have been leaders in transitioning their consumers to smartphone application usage.

There are a number of categories that are ripe for an increase in usage in Australia as consumers use their devices more, connect to Wi-Fi networks and data plans evolve. The following categories have considerably higher smartphone usage in the U.S. compared to Australia:




- **COMMERCE & SHOPPING** – There is more than a 10% point reach difference in commerce and shopping services with the U.S. having an active reach of 85% vs 71% in Australia, with Americans spending an hour longer per month on commerce sites and applications.

- **VIDEO/MOVIES** – 78% of Americans smartphone users access a video site or application each month compared to 70% of Australians, with Americans spending nearly double the amount of time per person as Australians.
- **CURRENT EVENTS & GLOBAL NEWS** – One of the most popular genres on desktop in Australia and this is translating well to smartphones but when reviewing habits in America there is still considerable upside for this category in the Australian market with only 41% reach versus 55% in the U.S.
- **MUSIC** – 66% of Australians are using music services on their smartphone compared to 74% in the U.S. and Americans are spending an hour and a quarter longer per month consuming music content.



AUSTRALIAN MOBILE RANKINGS

While there is substantial fragmentation in usage across all digital devices, ratings data shows there are a considerable number of brands and apps on mobile devices with large audiences that are part of an individual's content repertoire.

	DESKTOP	SMARTPHONE	TABLET
			
BRANDS OVER 500,000 MONTHLY UNIQUE AUDIENCE	271	113	60
BRANDS OVER 1 MILLION MONTHLY UNIQUE AUDIENCE	122	56	24
APPS OVER 500,000 MONTHLY UNIQUE AUDIENCE	N/A	73	24
APPS OVER 1 MILLION MONTHLY UNIQUE AUDIENCE	N/A	38	14

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+); Nielsen Online Ratings (Ppl 2+)

RANKINGS – PARENTS

Google and Facebook are the leaders in both smartphone and tablet rankings at the parent (or organisation) level with a number of other global brands being very high in the rankings including Apple, eBay and Microsoft. Local players also feature strongly with Telstra, Yahoo7, Fairfax and News ranking highly.

SMARTPHONE - TOP 25 - PARENTS (WEB & APP)	
	UNIQUE AUDIENCE (000)
Google	11,877
Facebook	11,025
Apple Computer	6,119
eBay	6,009
Telstra Corporation	5,411
Microsoft	5,216
Yahoo7	4,796
Wikimedia Foundation	4,399
Australian Federal Government	4,288
Fairfax Media	4,140
News Australia	3,888
Commonwealth Bank	3,581
Twitter	3,546
Weather Channel Interactive	3,261
Amazon	2,920
Coles Group	2,716
Rakuten	2,481
Pinterest.com	2,316
Samsung Group	2,286
Snapchat	2,244
LinkedIn	2,237
Nine Entertainment Co	2,198
Woolworths	2,190
WhatsApp	2,046
Australian Broadcasting Corporation	1,901

TABLET - TOP 25 - PARENTS (WEB & APP)	
	UNIQUE AUDIENCE (000)
Google	6,845
Facebook	6,311
Apple Computer	3,594
Microsoft	3,482
eBay	3,098
Telstra Corporation	2,856
News Australia	2,651
Australian Federal Government	2,608
Twitter	2,550
Yahoo7	2,323
Fairfax Media	2,302
Wikimedia Foundation	2,250
Pinterest.com	1,901
Nine Entertainment Co	1,763
Amazon	1,713
Coles Group	1,534
Woolworths	1,495
Australian Broadcasting Corporation	1,419
LinkedIn	1,381
InterActiveCorp	1,319
WordPress.com	1,285
Loyalty Pacific	1,149
Electronic Arts	1,059
Commonwealth Bank	1,039
Walt Disney Internet Group	927

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

RANKINGS – BRANDS

SMARTPHONE - TOP 25 - BRANDS (WEB & APP)	
	UNIQUE AUDIENCE (000)
Google	11,773
Facebook	10,944
YouTube	7,646
Apple	6,119
Yahoo7	4,403
eBay	4,394
Wikipedia	4,020
Instagram	3,681
Twitter.com	3,470
Weather Channel Network	3,261
Telstra Corporate Websites	3,209
Commonwealth Bank	3,179
MSN/WindowsLive/Bing	3,155
PayPal	2,879
Telstra Media	2,695
Gumtree	2,649
Department of Human Services	2,601
Viber	2,348
Pinterest	2,316
Samsung	2,271
Snapchat	2,244
LinkedIn	2,237
Wikimedia Foundation	2,218
WhatsApp	2,046
Skype	1,980

TABLET - TOP 25 - BRANDS (WEB & APP)	
	UNIQUE AUDIENCE (000)
Google	6,721
Facebook	6,244
YouTube	4,547
Apple	3,594
Twitter.com	2,482
eBay	2,253
Yahoo7	2,087
MSN/WindowsLive/Bing	1,989
Wikipedia	1,985
Pinterest	1,901
PayPal	1,699
Telstra Corporate Websites	1,689
Amazon	1,464
Wikimedia Foundation	1,460
Microsoft	1,456
Instagram	1,442
Telstra Media	1,426
ABC Online Network	1,419
LinkedIn	1,381
WordPress.com	1,285
Skype	1,206
FlyBuys	1,149
Department of Human Services	1,091
taste.com.au	1,090
Gumtree	1,078

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

RANKINGS – APPLICATIONS

Nine out of the 10 top applications on both smartphones and tablets are owned by Facebook, Google and Apple, with eBay taking the tenth spot on the smartphone rankings and Skype (owned by Microsoft) taking the tenth spot for tablet rankings.

SMARTPHONE - TOP 25 - APPS	
	UNIQUE AUDIENCE (000)
Facebook	9,086
Facebook Messenger	7,848
YouTube	5,504
Apple Music	5,199
Google Maps	5,048
Google Play	4,672
Google Search#	4,496
Maps(Apple)	3,691
Gmail	3,479
eBay Mobile	3,116
Instagram	3,102
Weather	3,093
CommBank	2,708
Viber	2,348
Snapchat	2,231
Google+	2,129
WhatsApp Messenger	2,036
Skype	1,892
Google Drive	1,847
Telstra 24x7	1,669
Twitter	1,659
PayPal	1,591
Dropbox	1,557
Gumtree Australia	1,478
ANZ goMoney Australia	1,415

TABLET - TOP 25 - APPS	
	UNIQUE AUDIENCE (000)
Facebook	4,477
Facebook Messenger	3,724
YouTube	2,809
Apple Music	2,719
Google Search#	1,793
Google Play	1,640
Gmail	1,442
iBooks	1,409
Google Maps	1,346
Skype	1,181
eBay Mobile	1,114
Maps(Apple)	1,100
Instagram	969
Pinterest	887
Chrome#*	825
Twitter	791
Dropbox	736
Telstra 24x7	723
ABC iview	640
Google+	605
Adobe Acrobat Reader	599
Viber*	549
Google Drive	518
PayPal	481
Weatherzone	470

#Google Search App and Chrome App audience is understated due to an iOS measurement limitation, which is currently being addressed.

Note: Entities marked with an asterisk (*) do not meet minimum sample size standards and may exhibit significant variability month-to-month.

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

ENTERTAINMENT, SEARCH AND SOCIAL CONTENT LEADS ON MOBILE DEVICES

Although there are differences in category usage across different devices, there is very strong monthly reach across a large range of categories. And, as we have seen from U.S. data, this is likely to increase.




UNIQUE AUDIENCE NUMBERS FOR CONTENT CATEGORIES

MONTHLY AUDIENCE (MILLIONS)	DESKTOP	SMARTPHONE	TABLET
Entertainment	11.7	11.8	6.9
Search	11.3	11.3	6.6
Computers & Electronics	11.2	5.3	3.5
Portals	10.9	8.8	5.1
Telcom/Internet Services	10.5	10.7	5.5
News & Information	9.3	10.0	5.1
Social	9.2	11.6	6.6
Commerce & Shopping	9.1	8.9	4.9
Finance	9.1	9.4	4.3
Govt & Non profit	8.3	5.5	3.3
Videos/Movies	7.9	8.8	5.2
Family & Lifestyles	7.8	7.6	4.0
Home & fashion	7.7	6.8	4.2
Travel	7.5	9.6	4.2
Corporate Information	6.5	5.5	3.7
Education & Careers	6.4	4.8	2.6
Sport	5.6	4.9	2.5
Gaming	4.1	8.0	4.7
Automotive	3.6	2.4	1.5
Messaging	3.4	8.0	3.9
Music	3.0	8.2	3.9

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+); Nielsen Online Ratings (Ppl 2+)

CERTAIN CATEGORIES DRIVE STRONGER REACH ON MOBILE VERSUS DESKTOP, AND VICE VERSA

Most of the categories in the “larger reach” column are unsurprising. The “similar reach” column highlights categories that already have similar monthly reach numbers to desktop. The smaller reach column is likely to change over the next 12 months – sport in particular will increase as video viewing grows. Note that mobile in the below table refers to an average across smartphone and tablet devices.

 LARGER REACH ON MOBILE	 SIMILAR REACH ACROSS PLATFORMS	 SMALLER REACH ON MOBILE
SOCIAL	ENTERTAINMENT	GOVERNMENT
VIDEO/MOVIES	SEARCH	CORPORATE
GAMING	FINANCE	SPORT
MESSAGING	COMMERCE & SHOPPING	EDUCATION
MUSIC	LIFESTYLE	COMPUTERS/ELECTRONICS
TRAVEL	NEWS & INFO	HOME/FASHION
		AUTOMOTIVE

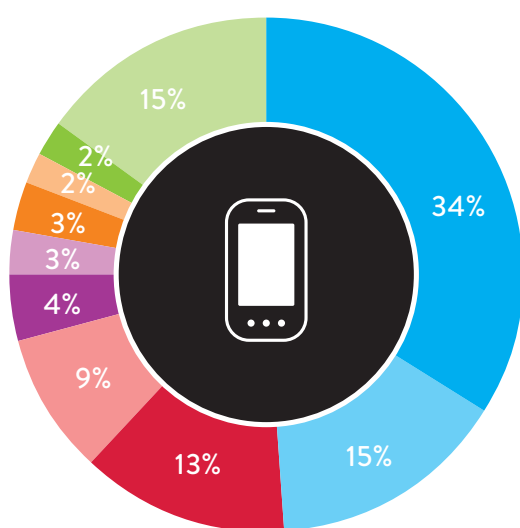
DISTRIBUTION OF TIME ACROSS CATEGORIES IS SIMILAR ON SMARTPHONE & TABLET

Similar to research previously released by Nielsen, Mobile Ratings is showing just over one third of smartphone time is spent on social and just under 30% of tablet time is on social. Entertainment and gaming follow on from social in relation to time consumption, with the fast growing area of messaging behind these categories.

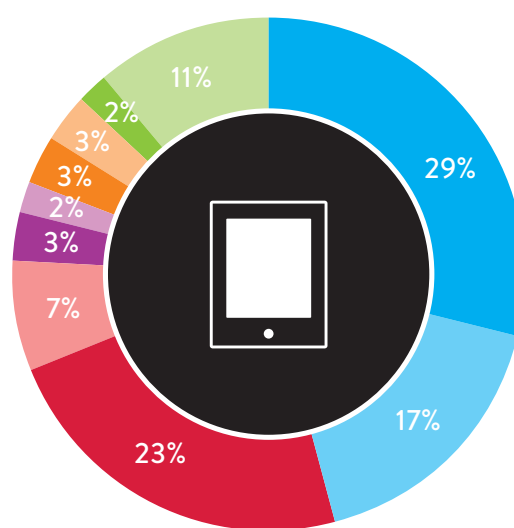
Note: Any in-app activity that may differ in purpose from the primary application is not split out currently. Please see the 'About Nielsen Online Ratings' section for more information.

DISTRIBUTION OF TIME SPENT

DISTRIBUTION OF TIME SPENT - SMARTPHONE



DISTRIBUTION OF TIME SPENT - TABLET



● SOCIAL ● ENTERTAINMENT (EXCL GAMING) ● GAMING ● MESSAGING ● PRODUCTIVITY
● NEWS & INFO ● COMMERCE ● SEARCH ● HEALTH ● OTHER

CURRENT EVENTS & GLOBAL NEWS CATEGORY

Both the smartphone and tablet rankings are dominated by the same brands that have historically been strong in desktop ratings.

SMARTPHONE - TOP 10 - CURRENT EVENTS & GLOBAL NEWS BRANDS (INCL APPS)

	UNIQUE AUDIENCE (000)
news.com.au	1,315
smh.com.au	1,209
ABC News Websites	1,128
Daily Mail Australia	858
Yahoo7 News Websites	745
ninemsn News Websites	737
The Guardian	689
The Daily Telegraph	603
Herald Sun	583
The Age	561

TABLET - TOP 10 - CURRENT EVENTS & GLOBAL NEWS BRANDS (INCL APPS)

	UNIQUE AUDIENCE (000)
news.com.au	815
smh.com.au	697
The Daily Telegraph*	499
ABC News Websites	488
BBC*	480
ninemsn News Websites*	469
Herald Sun*	466
Daily Mail Australia	461
Yahoo7 News Websites*	375
The Guardian*	305

Note: Entities marked with an asterisk (*) do not meet minimum sample size standards and may exhibit significant variability month-to-month.

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

ENTERTAINMENT CATEGORY

The entertainment category includes a wide range of content, much of which drives very high durations. People are spending over 10 hours per month on average on both smartphones and tablets. This compares to just under 13 hours on social for smartphone users and eight hours on social for tablet users.

SMARTPHONE - ENTERTAINMENT - TOP SUB CATEGORIES		
	UNIQUE AUDIENCE (000)	TIME PER PERSON (HH:MM:SS)
Entertainment - Total	11,794	10:14:36
Video/Movies	8,808	01:10:53
Music	8,196	03:58:39
Gaming	7,994	07:08:06
Multi-category Entertainment	6,144	00:44:07
Sports	4,926	01:01:36
Broadcast Media	3,632	00:28:49
Books/Magazines/Comics	3,089	00:53:40

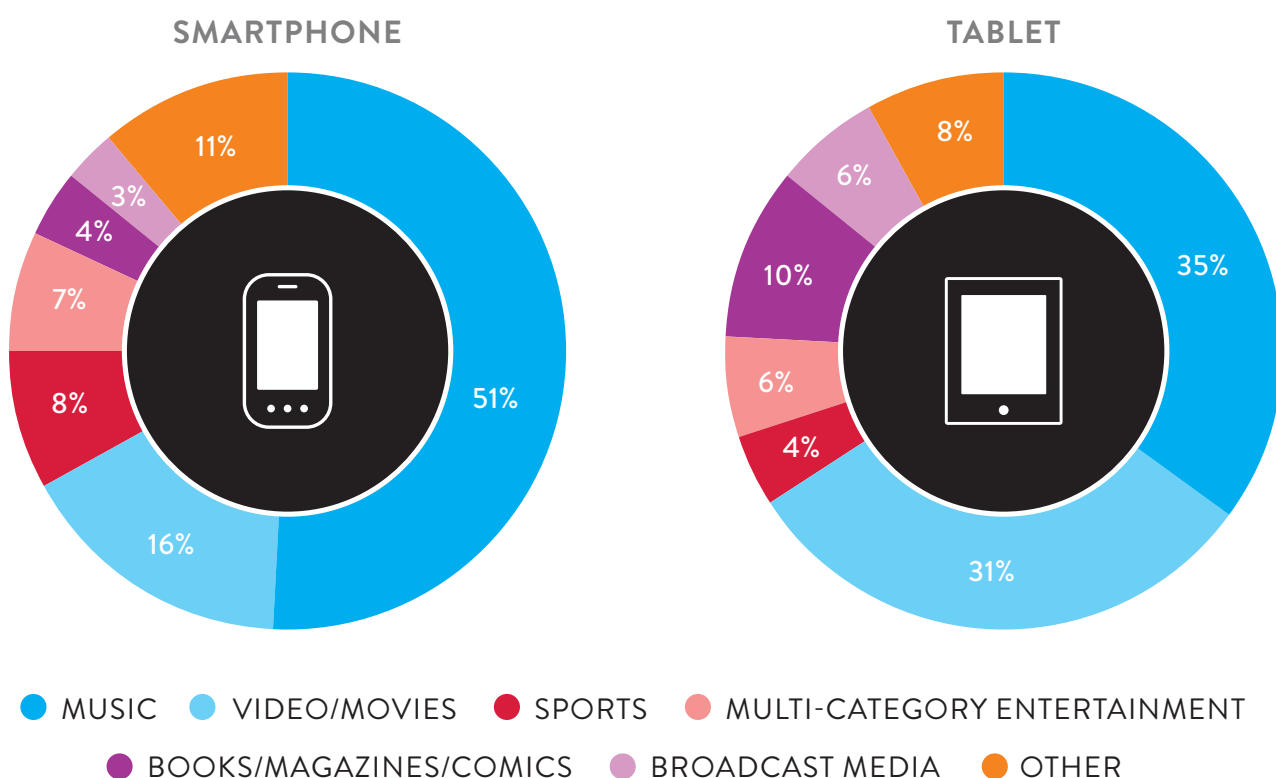
TABLET - ENTERTAINMENT - TOP SUB CATEGORIES		
	UNIQUE AUDIENCE (000)	TIME PER PERSON (HH:MM:SS)
Entertainment - Total	6,887	10:40:44
Video/Movies	5,220	01:52:57
Gaming	4,702	08:49:15
Music	3,853	02:53:53
Multi-category Entertainment	3,374	00:37:48
Broadcast Media	2,930	00:40:05
Sports	2,512	00:32:08
Books/Magazines/Comics	2,471	01:16:11

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)



The charts below show the distribution of time within the entertainment category (excluding gaming) which shows the dominance of streaming heavy categories, both video and audio. The music category experienced a dramatic increase in time metrics for July compared to previous beta data primarily due to the launch of Apple Music and their corresponding three month free trial. Tablet in particular is strong for video content.

DISTRIBUTION OF TIME - ENTERTAINMENT CATEGORY (EXCL GAMING)



ENTERTAINMENT -VIDEO & AUDIO STREAMING

Video and audio streaming services are mostly spread across three entertainment subcategories – video/movies, broadcast media and music. The first table below reviews metrics for those three categories and shows an impressive audience of 10.7m. The second table reviews the hotly contested video-on-demand sector (both SVOD and AVOD) with aggregate data on the leading applications in this space (excluding YouTube). Although smartphones and tablets are often not the primary device used for these services, there are strong audiences on both.

AUDIO & VIDEO CONTENT - OVERALL		
	MONTHLY UNIQUE AUDIENCE	AVERAGE TIME SPENT
Smartphone	10.7m	4hr 16 mins
Tablet	5.1m	1hr 53 mins

VIDEO ON DEMAND APPLICATIONS (EXCL YOUTUBE)		
	MONTHLY UNIQUE AUDIENCE	AVERAGE TIME SPENT
Smartphone	1.3m	42 mins
Tablet	1.6m	1hr 23 mins

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

ENTERTAINMENT -SPORT

Being seasonal, the sport category will see major fluctuations each month. However for the month of July, 4.9m Australians used sports services on their smartphone spending just over an hour on average and 2.5m on their tablets spending 32 minutes on average.

Telstra's AFL and ESPN held the largest smartphone sports audiences in July, with AFL holding the lead in tablet ratings as well, though with a smaller margin.

SMARTPHONE - TOP BRANDS (INCL APPS) - SPORT	
	UNIQUE AUDIENCE (000)
Telstra Media AFL	1,423
ESPN Digital Network	1,138
Telstra Media NRL	815
FOX SPORTS	532
News.com.au - Sport	464

TABLET - TOP BRANDS (INCL APPS) - SPORT	
	UNIQUE AUDIENCE (000)
Telstra Media AFL	690
ESPN Digital Network	624
FOX SPORTS*	509
Telstra Media NRL*	366
The Daily Telegraph - Sport*	301

Note: Entities marked with an asterisk (*) do not meet minimum sample size standards and may exhibit significant variability month-to-month.

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

COMMERCE & SHOPPING

Nine million Australians are using commerce or shopping sites each month on their smartphone and five million are doing so on their tablet. There is a broad range of types of activity – from auctions, retail purchases, browsing and loyalty programs. Both smartphone and tablet rankings are led by eBay and Gumtree with eBay having very high engagement through their time per person metrics. People are spent 1 hour 19 minutes on commerce sites during July on their smartphones and 1 hour 3 minutes on their tablets. Apart from eBay and Amazon, local corporations feature very heavily in the rankings.

SMARTPHONE - TOP 10 - COMMERCE & SHOPPING BRANDS (INCL APPS)

	UNIQUE AUDIENCE (000)
eBay	4,394
Gumtree	2,649
FlyBuys	1,851
Amazon	1,770
Coles	1,585
Woolworths	1,333
Target Australia	802
Catch of the Day	749
JB Hi-Fi	702
BIG W	656

TABLET - TOP 10 - COMMERCE & SHOPPING BRANDS (INCL APPS)

	UNIQUE AUDIENCE (000)
eBay	2,253
Amazon	1,464
FlyBuys	1,149
Gumtree	1,078
Woolworths	769
Coles	724
JB Hi-Fi	636
Shopping.com Network*	617
Target Australia*	603
Harvey Norman*	563

Note: Entities marked with an asterisk (*) have a do not meet minimum sample size standards and may exhibit significant variability month-to-month.

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

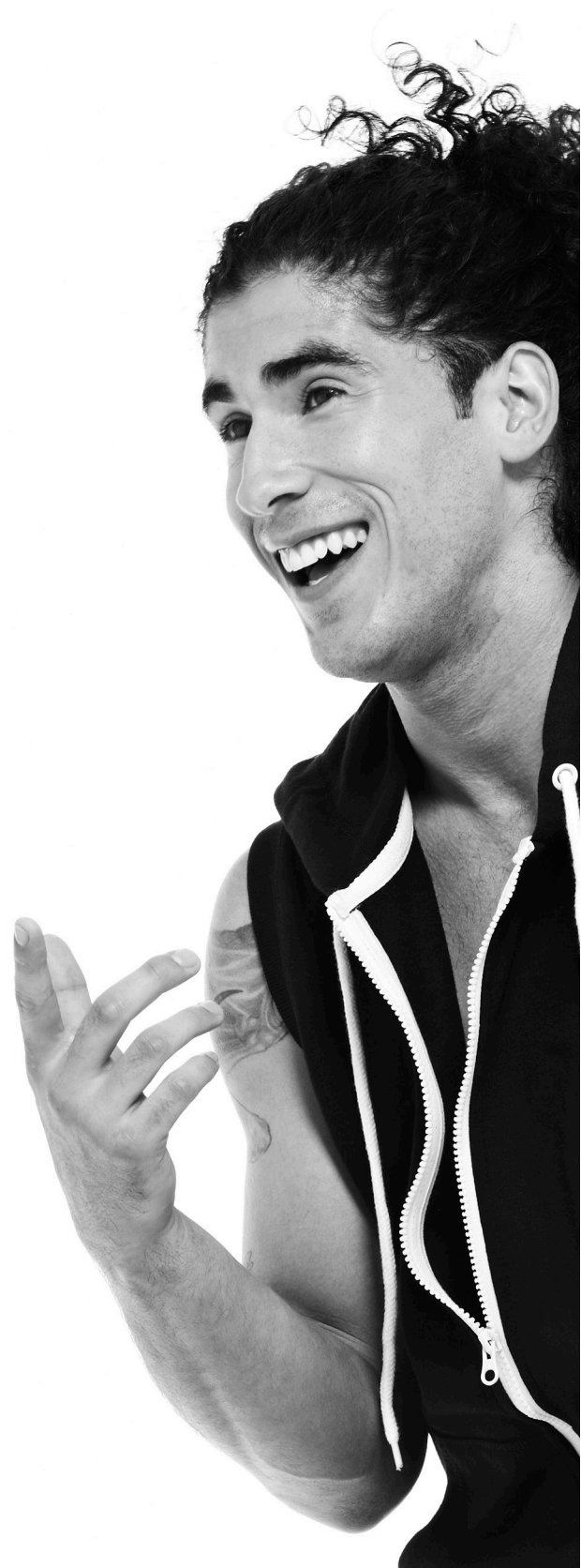
HEALTH, FITNESS & NUTRITION

The health category is performing very strongly on mobile devices, smartphones in particular, as consumers tap into both health information and tools. The 5.3m Australians aged 18+ who used health related content or tools on their smartphone during July spent over three times as long on these services as people using similar services on desktops. Applications such of those offered by Fitbit, MyFitness Pal and RunKeeper have frequent and engaged audiences.

SMARTPHONE - TOP 10 - HEALTH, FITNESS & NUTRITION BRANDS (INCL APPS)

	UNIQUE AUDIENCE (000)
WebMD HEALTH NETWORK	1,066
Fitbit	754
S Health	603
Calorie Counter & Diet Tracker by MyFitnessPal	495
Everyday Health Network	474
Healthline	346
Chemist Warehouse	339
MedicineNet.com	304
Livestrong.com	294
Drugs	283

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)



AUTOMOTIVE INFORMATION, CAREER DEVELOPMENT & REAL ESTATE

In Australia, 1.6 million people are using their smartphones to seek automotive information online, while 799,000 people use their tablet devices. Carsales.com.au is leading the category significantly on smartphone, but also on tablet devices. This is closely followed by Gumtree Automotive Websites on smartphones and carsGuide.com.au on tablet devices.

Australia has historically been a global leader both in advertising revenue and desktop usage for the three leading classifieds categories - cars, jobs and real estate with strong local players leading the market. This tradition continues on smartphones with Australia leading Americans in terms of reach for all three categories.

SMARTPHONE - TOP 5 - AUTOMOTIVE INFORMATION ENTITIES	
	UNIQUE AUDIENCE (000)
carsales.com.au	721
Gumtree Automotive Websites	378
carsGuide.com.au*	240
Carsalesnetwork.com.au*	213
GoAuto*	119

TABLET - TOP 5 - AUTOMOTIVE INFORMATION ENTITIES	
	UNIQUE AUDIENCE (000)
carsales.com.au*	298
carsGuide.com.au*	177
Gumtree Automotive Websites*	112
Carsalesnetwork.com.au*	106
Drive.com.au*	81

Note: Entities marked with an asterisk (*) do not meet minimum sample size standards and may exhibit significant variability month-to-month.

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

Seek and Indeed continue to lead the Career category not only on smartphone and tablet devices but also for desktop in Australia.

SMARTPHONE - TOP 5 - CAREER ENTITIES	
	UNIQUE AUDIENCE (000)
Seek	1,377
Seek Jobs	941
Indeed	662
careerone.com.au	349
careerone - Jobs	208

TABLET - TOP 5 - CAREER ENTITIES	
	UNIQUE AUDIENCE (000)
Seek*	395
Seek Jobs*	336
Indeed*	275
careerone.com.au*	168
careerone - Jobs*	122

The Real Estate/Apartments category is dominated by two entities. Realestate.com.au is the category leader, followed by Domain. Historically these entities have been strong in mobile devices as well as on desktop ratings. OnTheHouse.com.au has been ranked as the 3rd preferred entity by tablet and desktop users - while allhomes.com.au is preferred by smartphone users.

SMARTPHONE - TOP 5 - REAL ESTATE/APARTMENTS ENTITIES	
	UNIQUE AUDIENCE (000)
realestate.com.au	1,522
Domain	1,075
allhomes.com.au*	124
Gumtree Real estate Websites*	119
Flatmates.com.au*	112

TABLET - TOP 5 - REAL ESTATE/APARTMENTS ENTITIES	
	UNIQUE AUDIENCE (000)
realestate.com.au	907
Domain	577
OnTheHouse.com.au*	161
allhomes.com.au*	78
Gumtree Real estate Websites*	77

Note: Entities marked with an asterisk (*) do not meet minimum sample size standards and may exhibit significant variability month-to-month.
Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

ABOUT IAB AUSTRALIA

The Interactive Advertising Bureau (IAB) Limited is the peak trade association for online advertising in Australia and was incorporated in July 2010. As one of over 40 IAB offices globally, and with a rapidly growing membership, IAB Australia's principal objective is to support and enable the media and marketing industry to ensure that they thrive in the digital economy.

The role of the IAB is to work with its members and the broader advertising and marketing industry to assist marketers to identify how best to employ online as part of their marketing strategy, to better target and engage their customers and build their brands.

By addressing the core pillars of growth of the online advertising industry - simplified and standard online audience measurement, research, and online operational standards and guidelines, and regulatory affairs, IAB Australia leverages the skills, experience and commitment of its members to advocate the benefits of online advertising by acting as an authoritative and objective source for all online advertising issues whilst promoting industry-wide best practice.

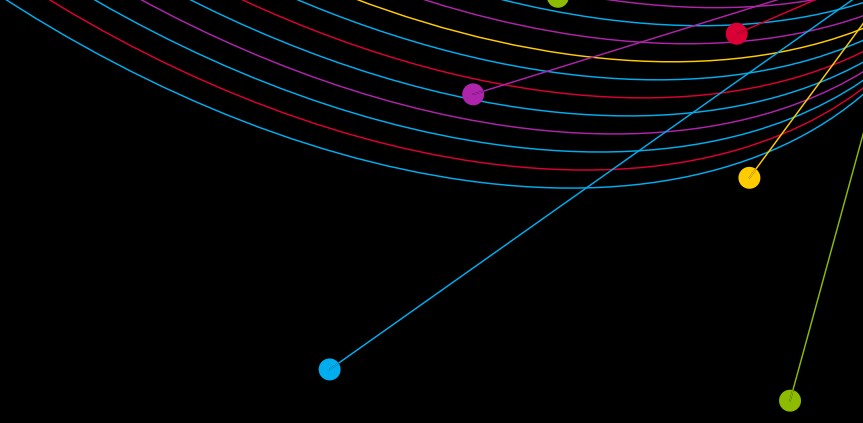
IAB Australia is a registered not-for-profit organisation; membership fees and revenue generated is invested back into the IAB's membership benefits such as resources, events, reporting, and industry representation.

ABOUT NIELSEN

Nielsen N.V. (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers Watch and Buy. Nielsen's Watch segment provides media and advertising clients with Total Audience measurement services across all devices where content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen provides its clients with both world-class measurement as well as analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries that cover more than 90 percent of the world's population.

For more information, visit www.nielsen.com.

Copyright © 2015 The Nielsen Company. All rights reserved. Nielsen and the Nielsen logo are trademarks or registered trademarks of CZT/ACN Trademarks, L.L.C. Other product and service names are trademarks or registered trademarks of their respective companies.15/9120



nielsen
.....

AN UNCOMMON SENSE
OF THE CONSUMER™