

nielsen

THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

SEPTEMBER 2015



STATE OF THE ONLINE LANDSCAPE

September 2015

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

The online landscape in September saw Australians spend 32 hours online over 60 sessions; with 36 billion minutes spent online.

Kids, games and toys sites experienced strong growth in September with an increase of 275,000 Australians (8%) for the category.

General Updates:

- **Mobile Story:** Australia's First Mobile Audience Measurement Solution
- **Higher Learning:** Celebrating Online Native Advertising Success in the Australian School Sector.
- **Digital Brand Effect:** We now have **local norms for Australia** available upon request!
- **Nielsen Twitter TV Ratings:** NFL beats out AFL in Twitter audience while the Bachelor takes top spot in non sport.

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.



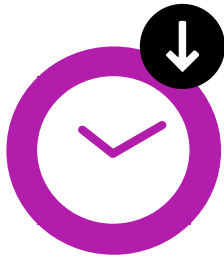
An abstract graphic on the left side of the slide. It features a sphere-like shape composed of many thin, curved lines in various colors (red, green, blue, yellow, purple). Several colored dots (yellow, pink, red) are placed on the surface of the sphere, with thin lines extending from them towards the right. The background is black.

HIGHLIGHTS

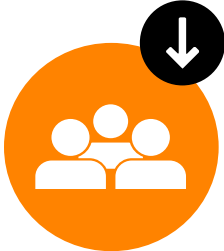
NIELSEN ONLINE RATINGS: HYBRID SURFING

AT A GLANCE: THE ONLINE LANDSCAPE

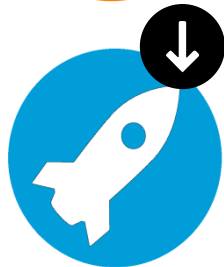
September 2015



36 billion minutes spent.



32 hours spent online, across **60 sessions** per person.



18,404,000 people were actively surfing online.



Indicates growth or decline based on the previous month

TOP 10 BRANDS AND THEIR ENGAGEMENT

September 2015

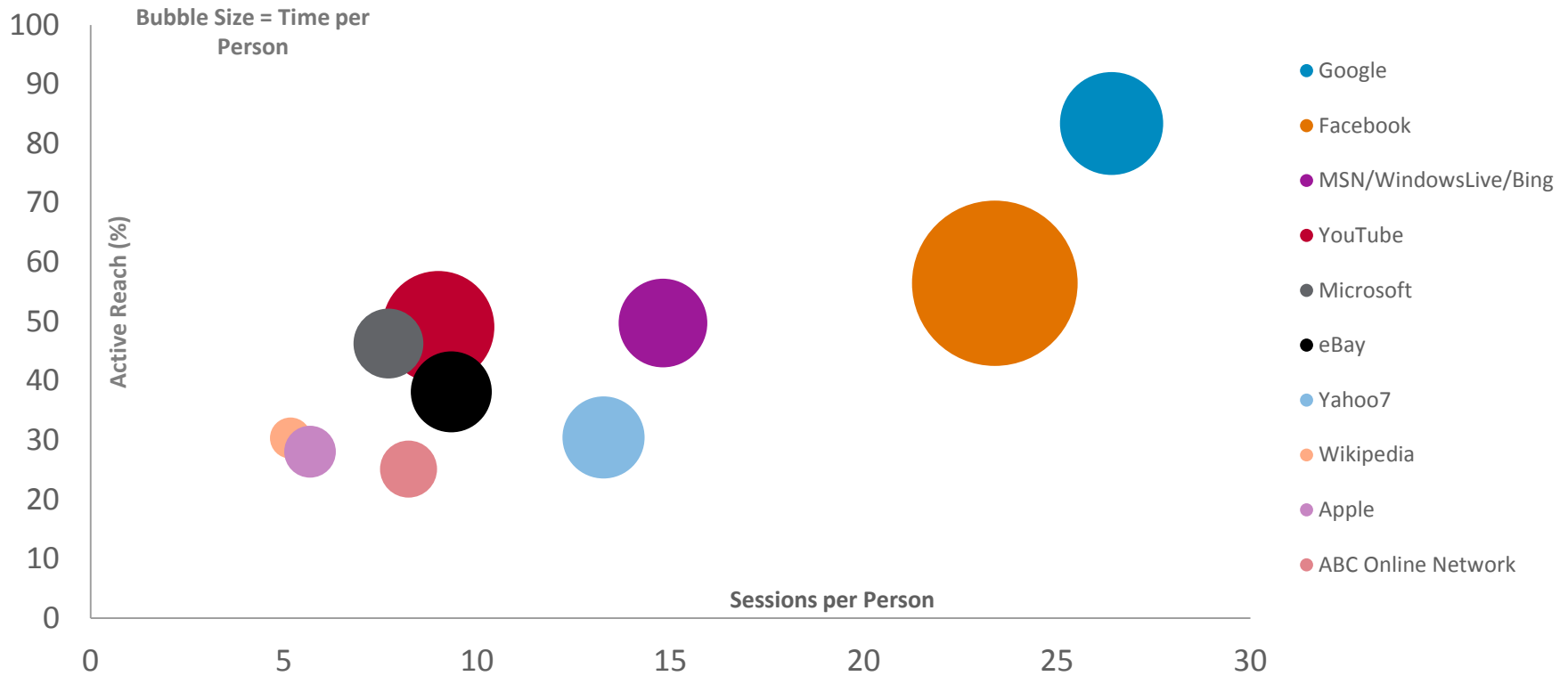
Unique Audience Rank	Brands	Unique Audience (000s)	Active Reach (%)	Sessions Per Person	Time Per Person (hh:mm:ss)
1	Google	15,344	83.37	26.41	02:35:34
2	Facebook	10,386	56.43	23.39	06:41:33
3	MSN/WindowsLive/Bing	9,151	49.72	14.80	01:55:24
4	YouTube	9,030	49.06	8.99	03:04:44
5	Microsoft	8,514	46.26	7.70	01:11:23
6	eBay	7,015	38.12	9.32	01:35:57
7	Yahoo7	5,603	30.44	13.27	01:38:50
8	Wikipedia	5,588	30.36	5.17	00:24:49
9	Apple	5,160	28.04	5.67	00:39:10
10	ABC Online Network	4,619	25.09	8.22	00:47:48

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, September 2015

TOP 10 BRANDS AND THEIR ENGAGEMENT

September 2015



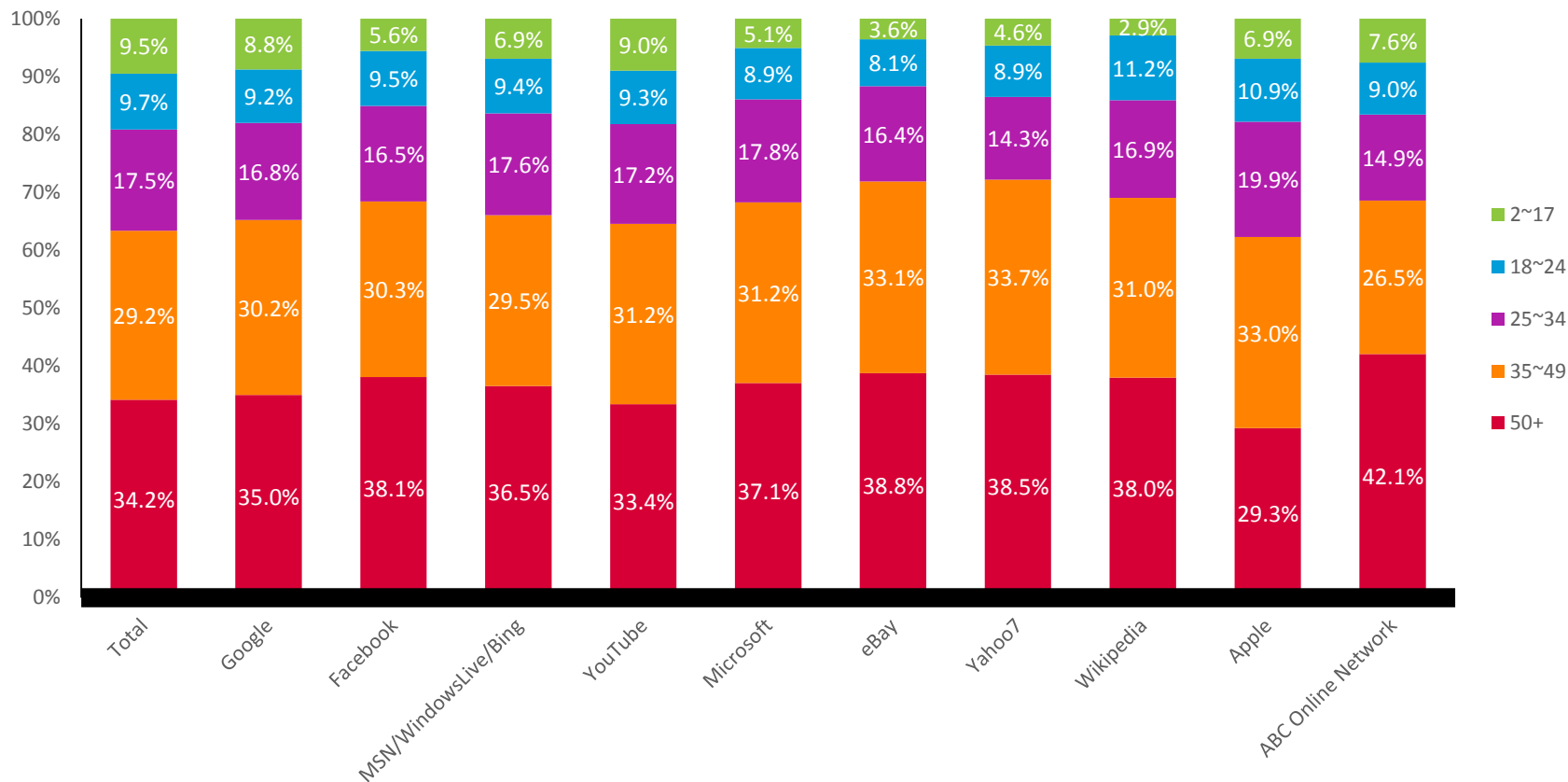
4 out of the top 10 sites experienced an increase in engagement across all key metrics during September.

Yahoo7 experienced an increase of 9.8% in sessions per person and 1.6% in time per person this month.

Meanwhile, eBay saw growth in time per person of 4.6% and an additional 2.4% in sessions per person.

TOP 10 BRANDS BY AGE

Unique Audience (Surfing): September 2015



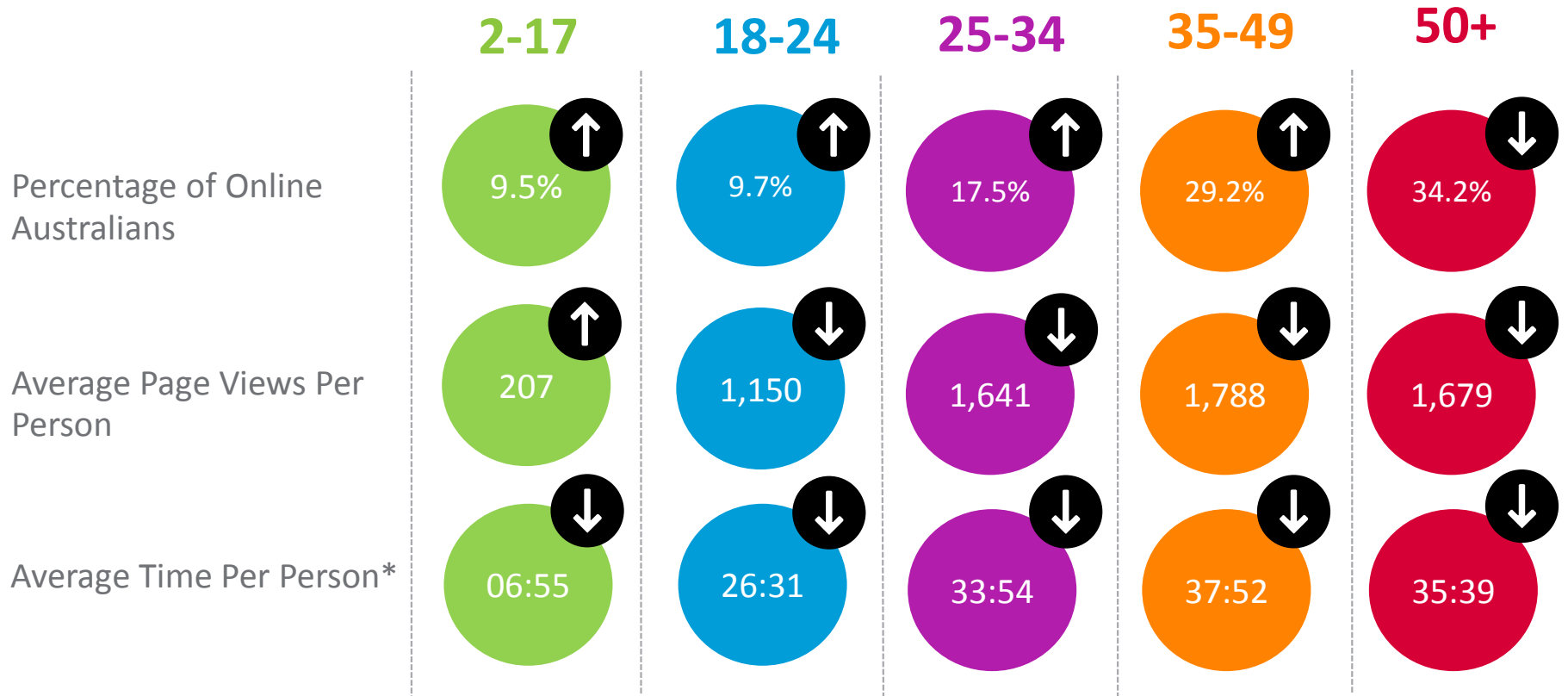
ABC Online Network slipped into the top ten this month, holding the highest skew towards those aged 50+ at 42.1%.

1 in 3 of Yahoo7 and eBay's audience was aged between 35-49 at 33.7% and 33.1% respectively. Meanwhile, Apple reported the heaviest skew towards Australians aged 25-34 at 19.9%.

Wikipedia and YouTube captivated young audiences with Wikipedia having the heaviest skew towards 18-24 year olds at 11.2% and YouTube having the heaviest skew towards 2-17 year olds at 9%.

HYBRID SURFING: DEMOGRAPHICS

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



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

The composition of unique audience shifted to younger Australians, with 2-49 year olds seeing slight boosts.

↑ ↓ Indicates growth or decline based on the previous month

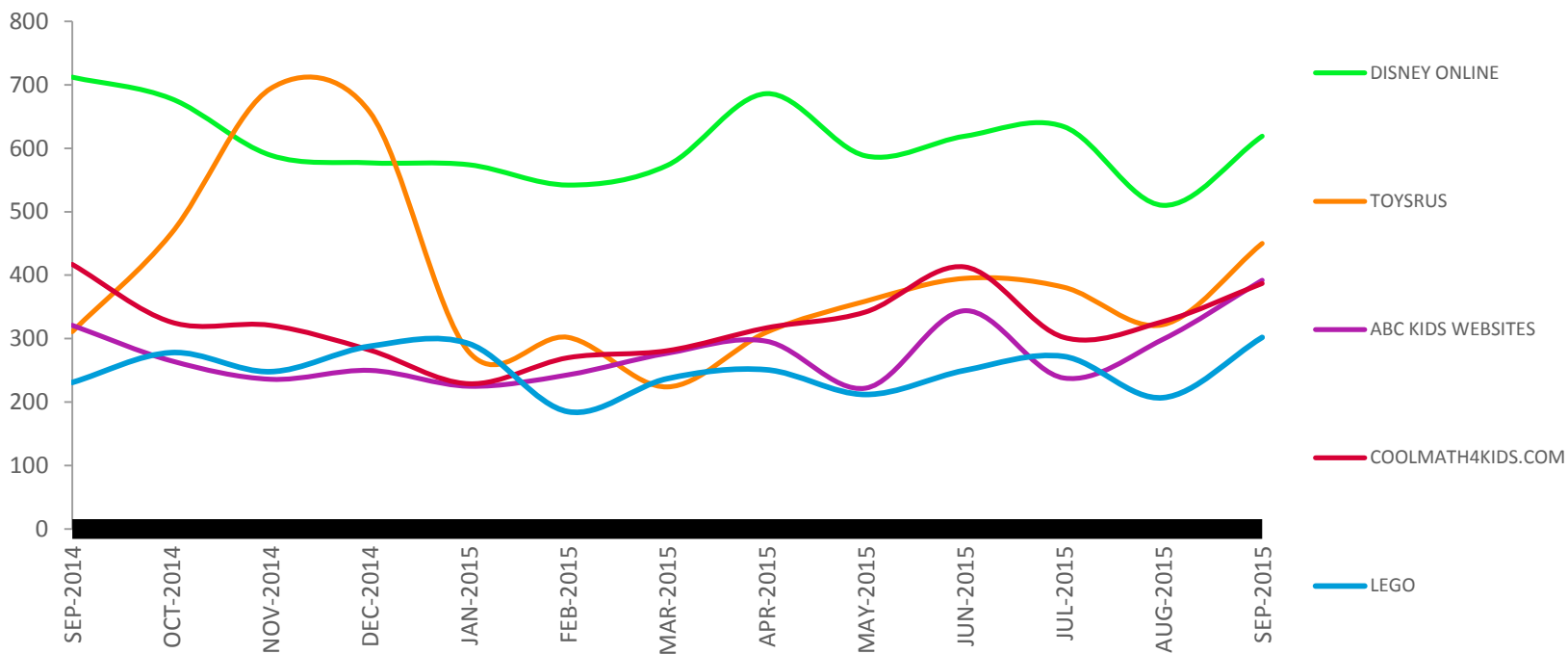
*HH:MM

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CATEGORY SPOTLIGHT: KIDS, GAMES, TOYS

SCHOOL HOLIDAYS ENCOURAGES A BOOST IN KIDS SITES

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



Kids, games and toys sites experienced strong growth in September with an increase of 275,000 Australians (8%) for the category.

The top 5 sites reported boosts in unique audience month on month, with LEGO experiencing a 46% increase, ToysRUs reporting a 40% increase and ABC Kids Websites growing 31%.

In addition, total sessions increased, with ToysRUs reporting an additional 363,000 sessions, marking a 61% increase and Coolmath4kids.com experiencing 50% growth.

This boost in engagement may be due to the school holiday period for the month.

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HIGHLIGHTS

NIELSEN ONLINE RATINGS: HYBRID STREAMING

HYBRID STREAMING KEY ONLINE STATISTICS

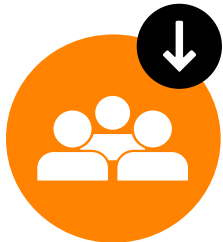
September 2015



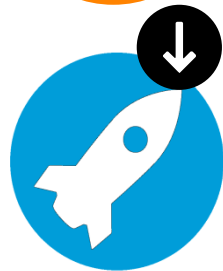
3.4 billion streams watched.



6 billion minutes streamed.



7 hours and 12 minutes spent streaming per person.



13,359,000 people were actively streaming online.



Indicates growth or decline based on the previous month

HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

September 2015

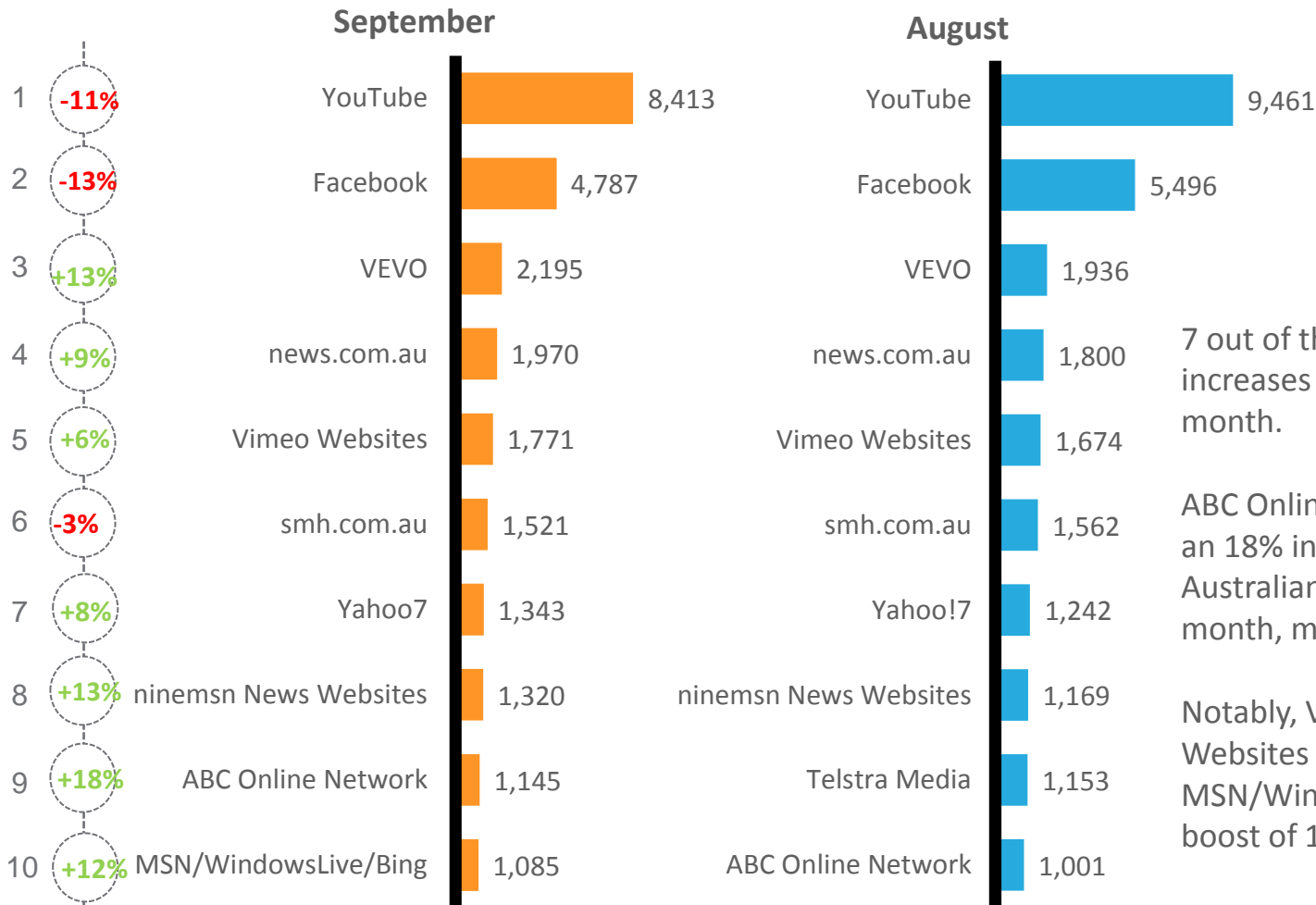
Unique Audience Rank	Brand	Unique Audience (000s)	Total Streams (000s)	Time Per Person (hh:mm:ss)
1	YouTube	8,413	1,839,061	05:28:16
2	Facebook	4,787	159,327	01:47:57
3	VEVO	2,195	134,351	01:12:55
4	news.com.au	1,970	9,501	00:04:53
5	Vimeo Websites	1,771	6,409	00:07:28
6	smh.com.au	1,521	7,325	00:06:53
7	Yahoo7	1,343	17,501	00:36:14
8	ninemsn News Websites	1,320	14,473	00:11:19
9	ABC Online Network	1,145	7,248	01:46:38
10	MSN/WindowsLive/Bing	1,085	8,662	00:08:27

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, September 2015

TOP BRANDS COMPARISON – HYBRID STREAMING

September 2015, Unique Audience (000s)



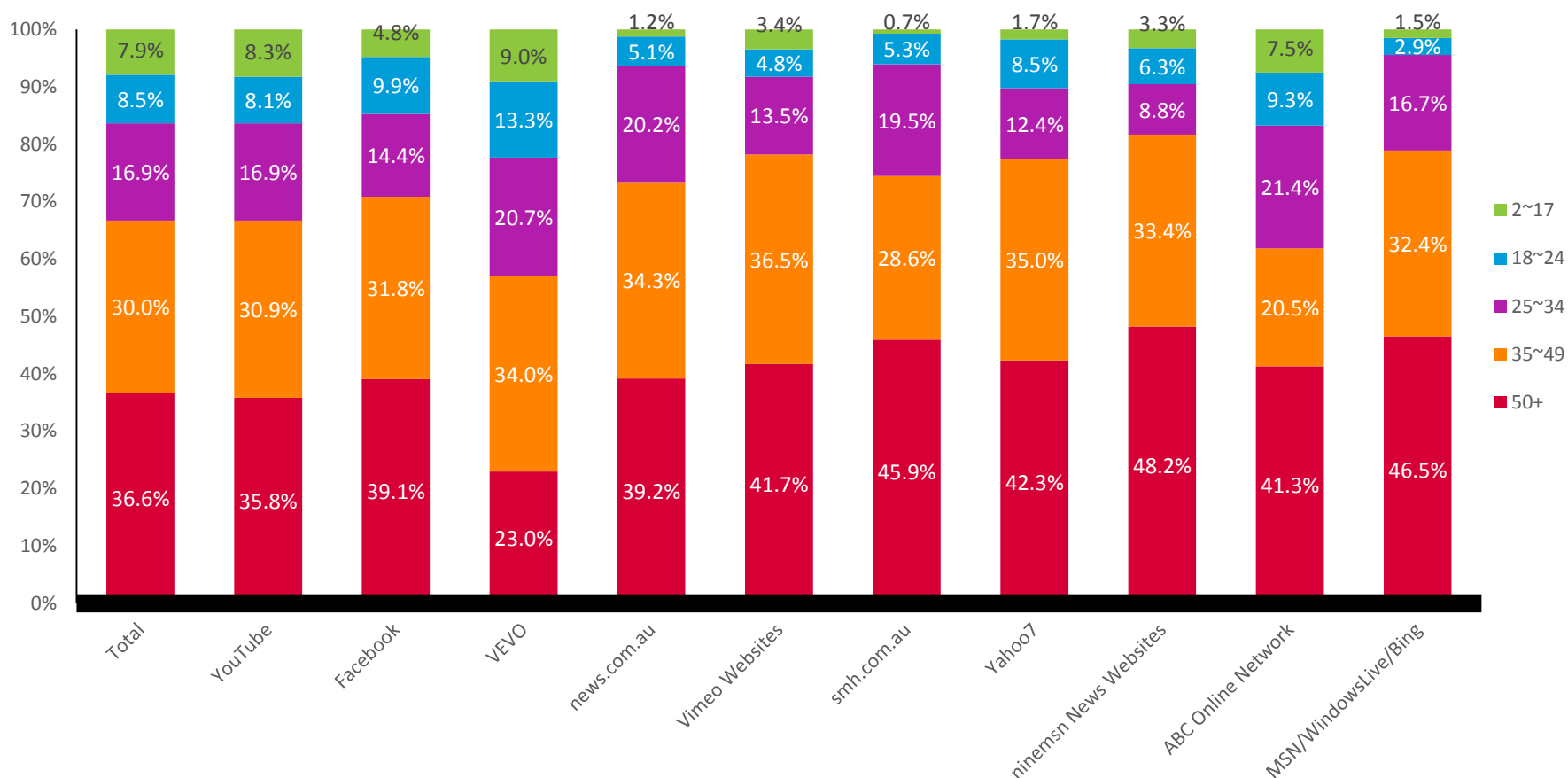
7 out of the top 10 sites reported increases in Unique Audience this month.

ABC Online Network experienced an 18% increase in streaming Australians in comparison to last month, moving to 9th place.

Notably, VEVO and ninemsn News Websites grew 13% followed by MSN/WindowsLive/Bing with a boost of 12%.

TOP 10 STREAMING BRANDS BY AGE

Unique Audience (Streaming): September 2015



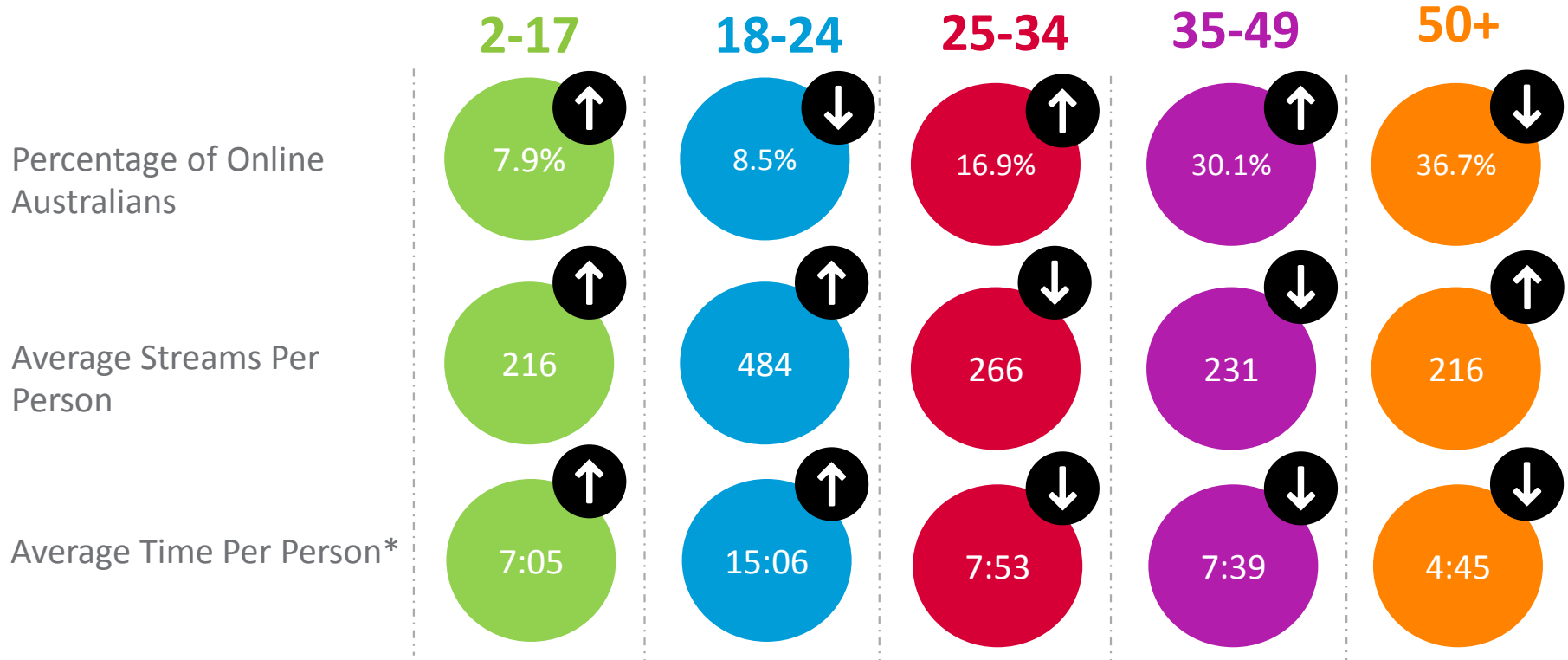
Ninemsn News Websites had the highest proportion of streaming Australians aged over 50, with almost half their audience falling into that age group.

Vimeo Websites reported the highest skew towards those aged between 35-49 years old at 36.5%.

1 in 5 Australians who stream on VEVO are below the age of 24.

HYBRID STREAMING: DEMOGRAPHICS

September 2015



All the age groups experienced increases this month.

Streams per person for the younger audiences experienced growth, with those aged 2-17 streaming an additional 49 times more and 18-24 year olds streaming 80 extra times. Meanwhile, 18-24 year olds spent almost 3 hours extra streaming.

↑ ↓ Indicates growth or decline based on the previous month

*HH:MM

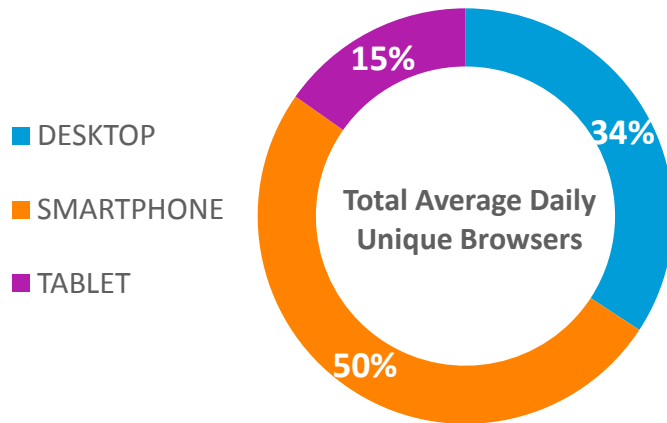
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DEVICE HIGHLIGHTS

NIELSEN ONLINE RATINGS: MARKET
INTELLIGENCE

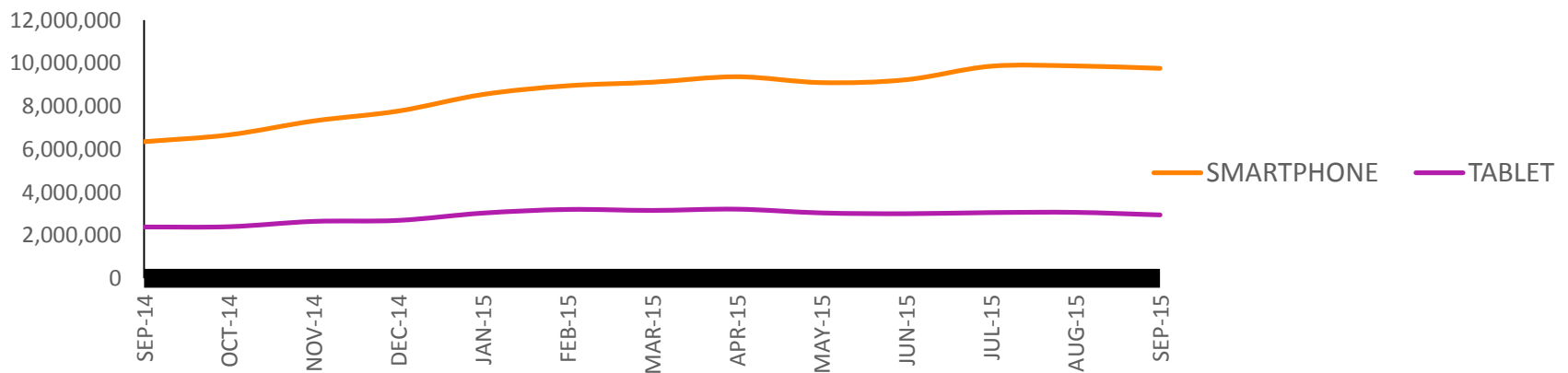
SITES ARE BROWSED MORE ON PORTABLE DEVICES

September 2015 – Market Domain – Domestic Traffic



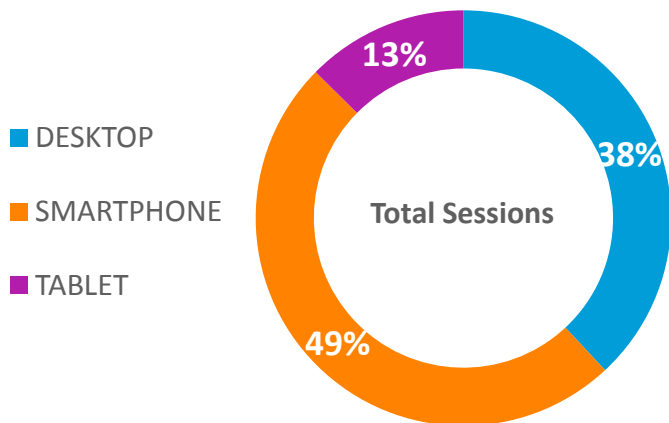
66% of total average daily unique browsers came from portable devices.

45% increase since September 2014 in total average daily unique browsers from portable devices



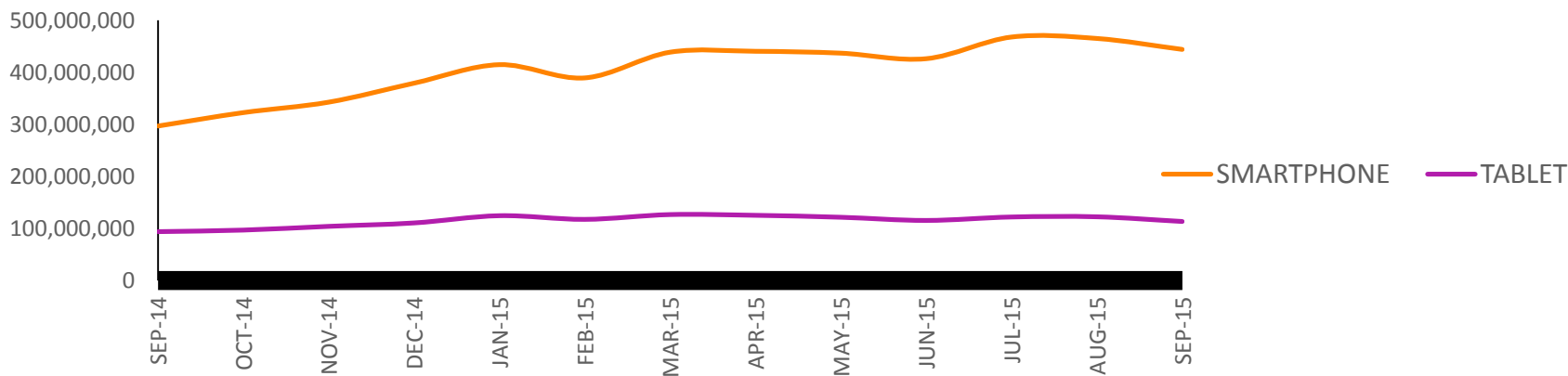
SESSIONS ON PORTABLE DEVICES HAS GROWN 55% IN A YEAR

September 2015 – Market Domain – Domestic Traffic



62% of total online sessions came from portable devices

43% increase since September 2014 in total online sessions from portable devices



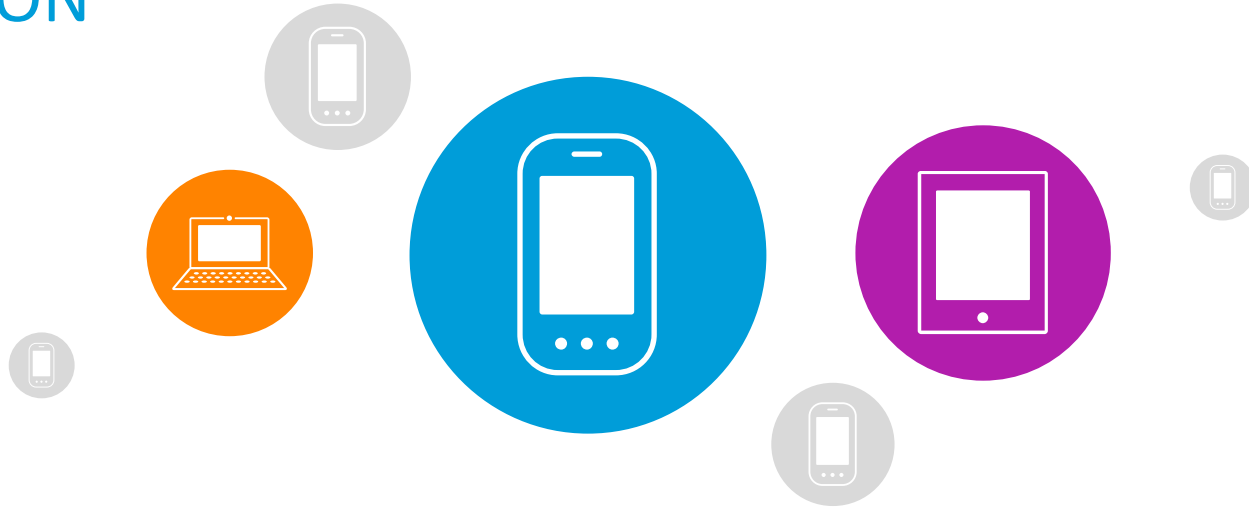
An abstract graphic on the left side of the slide. It features a series of concentric, curved lines that form a partial sphere or dome shape. The lines are colored in a gradient from blue to red. Several colored dots (yellow, green, purple, red) are placed on the surface of the sphere, with thin lines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

GENERAL UPDATES FOR THIS MONTH:

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THE MOBILE STORY

AUSTRALIA'S FIRST MOBILE AUDIENCE MEASUREMENT SOLUTION



It's the most rapidly emerging and exciting way consumers are accessing website and advertising content. We know that there are 12.5 million Australians actively accessing the internet using their smartphones and 7.4 million actively accessing the internet using their tablets in a month.

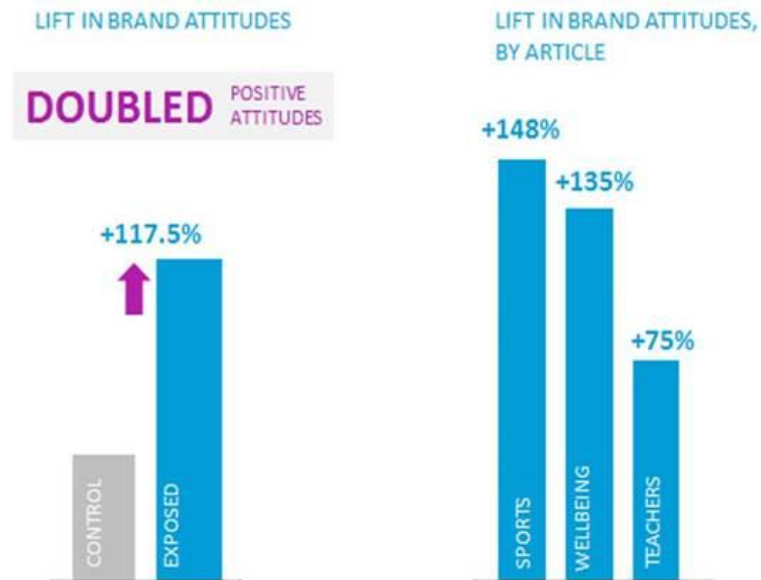
Now, with the first look of mobile audience measurement data in Australia, we know Australians 18+ spend more time on smartphones than any other digital device, with just over 33 hours per person, per month spent browsing or using apps.

To read the report, click [here](#).



**HIGHER LEARNING: CELEBRATING ONLINE
NATIVE ADVERTISING SUCCESS IN THE
AUSTRALIAN SCHOOL SECTOR**

NATIVE CONTENT: DO ONLINE AUDIENCES ACTUALLY NOTICE?



Online advertising is a common tool that schools use to attract students and highlight their role within the community. However, to best engage consumers, some education players have found that online display advertising alone is not enough because simply reaching eyeballs isn't always driving the desired reaction.

Building brand equity, proving value and trust are just as important.

Using the Nielsen Digital Brand Effect dashboard, Fairfax Media measured and monitored – in real-time – the success of the online native content in driving a positive lift in attitude towards the Melbourne-based independent school.

To see the insights, click [here](#).

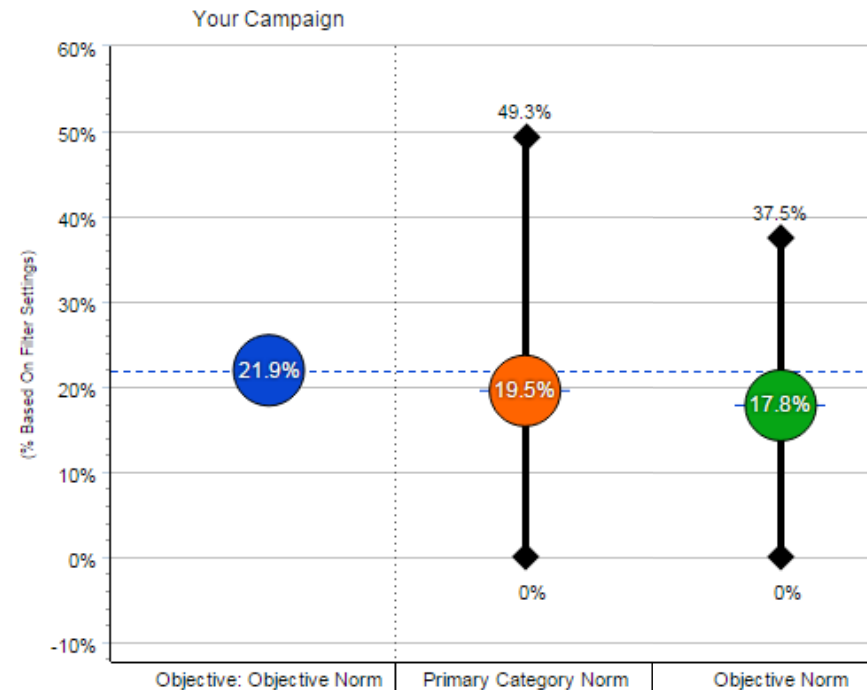
COMPARE YOUR CAMPAIGN'S BRAND LIFT AGAINST GLOBAL NORMS

My campaign achieved drove x% brand lift... but what does that mean?? Is that number good or bad?

- **Don't measure brand lift in a vacuum!** Having run thousands of Digital Brand Effect studies globally, we have a comprehensive **database that allows you to see how your campaign stacks up**
- **Benchmark your campaign's performance** against global category norms and against other campaigns with the same marketing objective
- We now have **local norms available for Australia** available upon request

ILLUSTRATIVE DATA ONLY

Norms Comparison ⁺



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NIELSEN TWITTER TV RATINGS: MONTHLY TOP 5

NIELSEN TWITTER TV RATINGS

Nielsen Twitter TV Ratings - September, 2015

Monthly Top Five - Sport



Rank	Network	Program	Date	Unique Audience	Impressions
1	ESPN	NFL 49ers v Vikings	15/09/15	193.3K	2.7M
2	*FOXFOOTY, SEVEN	AFL Brownlow Awards	28/09/15	189.4K	7.1M
3	*SEVEN, FOXFOOTY	AFL Fremantle v Hawthorn	25/09/15	130.9K	3.1M
4	*SEVEN, FOXFOOTY	AFL Sydney v North Melbourne	19/09/15	129.2K	2.0M
5	*SEVEN, FOXFOOTY	AFL Fremantle v Sydney	12/09/15	128.7K	1.7M

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 - September, 2015

Monthly Top Five - Non Sport



Rank	Network	Program	Date	Unique Audience	Impressions
1	TEN	The Bachelor Australia (Finale)	17/09/15	162.8K	7.0M
2	ABC	Q&A (Joan Baez, John Hewson, Terri Butler)	14/09/15	147.1K	2.2M
3	FOX8	67th Annual Primetime Emmy Awards	21/09/15	135.4K	865.9K
4	TEN	The Bachelorette Australia (Premiere)	23/09/15	123.3K	3.3M
5	TEN	The Bachelorette Australia	24/09/15	109.2K	2.4M

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.



nielsen
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AN UNCOMMON SENSE
OF THE CONSUMER™

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