

nielsen

THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

OCTOBER 2015



STATE OF THE ONLINE LANDSCAPE

October 2015

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

The online landscape in October saw Australians spend 32 hours online over 61 sessions; with 35 billion minutes spent online.

Insights:

- **Mobile Content Measurement:** Australia's First Mobile Audience Measurement Solution
- **Mobile Campaign Measurement:** The Launch of Nielsen's "Total Digital" Ad Measurement Solution
- **Pathmatics and Nielsen's Cutting-Edge Alliance:** More Sites, More Devices and More Flexibility!
- **Nielsen Twitter TV Ratings:** AFL Grand Final beats out NRL Grand Final in Twitter audience while the Bachelorette finale 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.



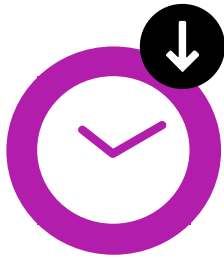
An abstract graphic on the left side of the slide. It features a series of concentric, curved lines that form a partial sphere or dome shape. The lines are colored in a gradient from purple to yellow. Several small, colored dots (yellow, pink, red) are placed on the surface of the sphere, with thin lines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

HIGHLIGHTS

NIELSEN ONLINE RATINGS: HYBRID SURFING

AT A GLANCE: THE ONLINE LANDSCAPE

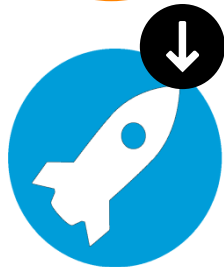
October 2015



35 billion minutes spent.



32 hours spent online, across **61 sessions** per person.



18,384,000 people were actively surfing online.



Indicates growth or decline based on the previous month

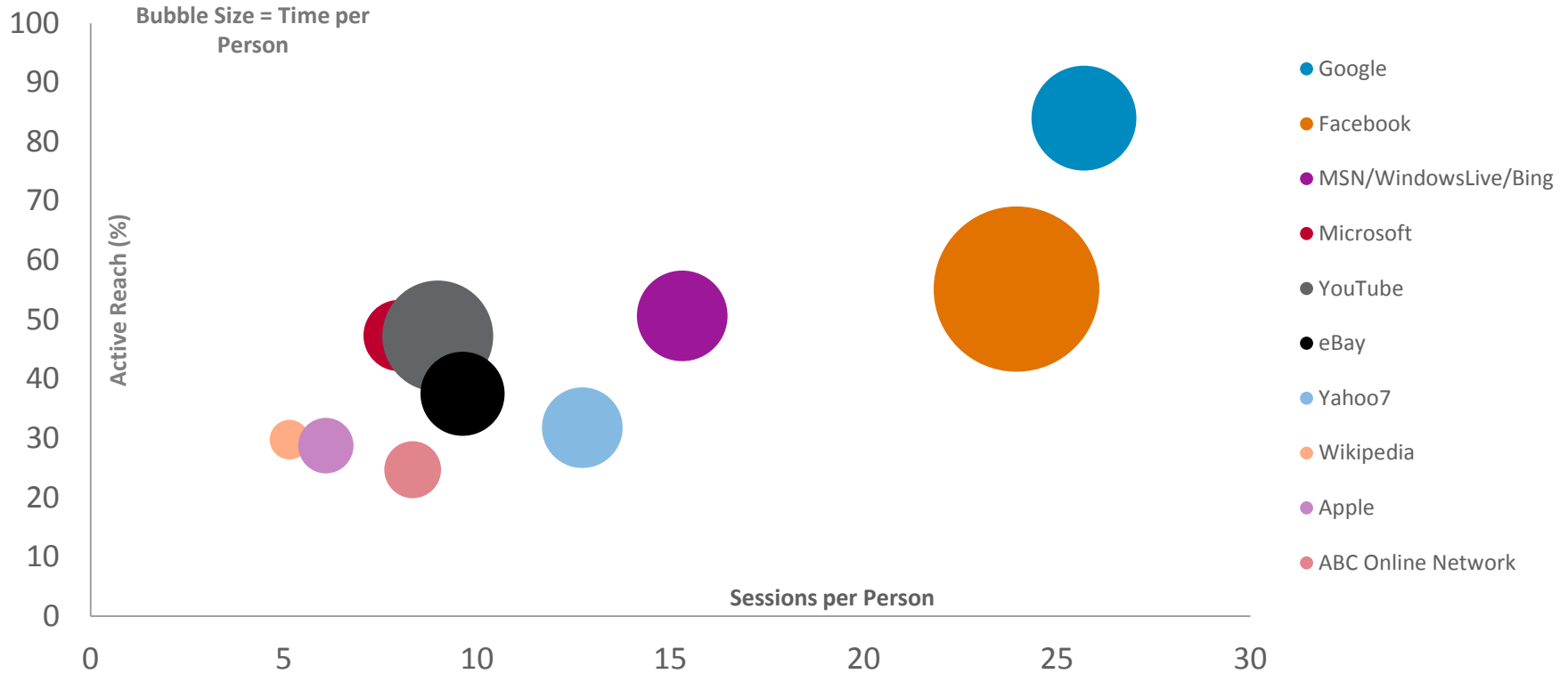
TOP 10 BRANDS AND THEIR ENGAGEMENT

October 2015

Unique Audience Rank	Brands	Unique Audience (000s)	Active Reach (%)	Sessions Per Person	Time Per Person (hh:mm:ss)
1	Google	15,437	83.97	25.69	02:35:02
2	Facebook	10,136	55.14	23.95	06:25:15
3	MSN/WindowsLive/Bing	9,305	50.62	15.30	01:55:19
4	Microsoft	8,695	47.30	7.98	01:11:35
5	YouTube	8,680	47.21	8.98	02:53:25
6	eBay	6,891	37.48	9.62	01:38:59
7	Yahoo7	5,837	31.75	12.71	01:31:49
8	Wikipedia	5,469	29.75	5.14	00:21:55
9	Apple	5,284	28.74	6.08	00:43:18
10	ABC Online Network	4,537	24.68	8.33	00:45:24

TOP 10 BRANDS AND THEIR ENGAGEMENT

October 2015

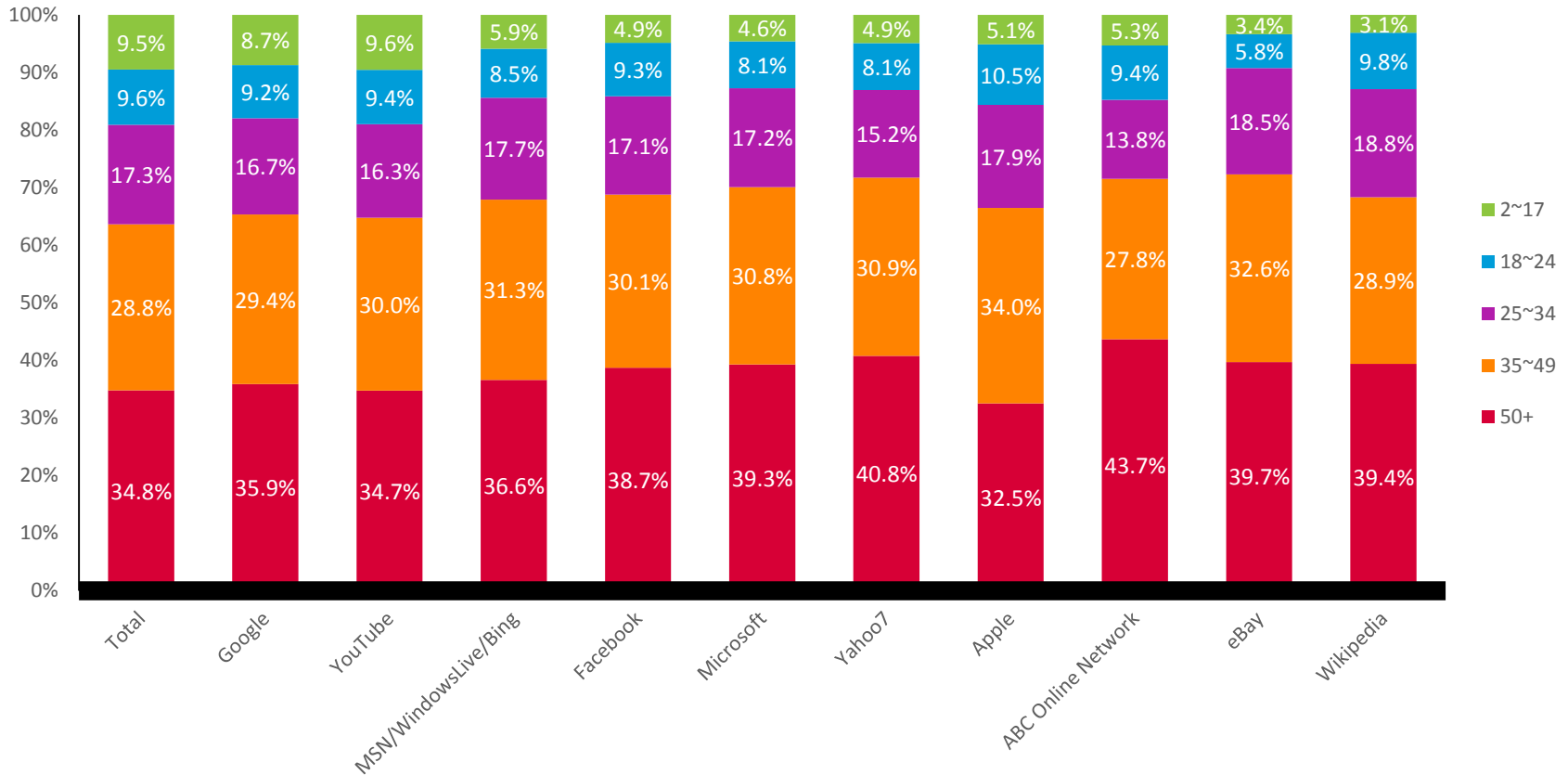


5 out of the top 10 sites experienced an increase in active reach (%) month-on-month in October.

Microsoft experienced an increase of 3.6% in sessions per person and 2.2% in active reach (%) – ranking fourth in the top 10 brands for October. Meanwhile, Apple saw growth in time per person of 10.6% and an additional 7.2% in sessions per person.

TOP 10 BRANDS BY AGE

Unique Audience (Surfing): October 2015

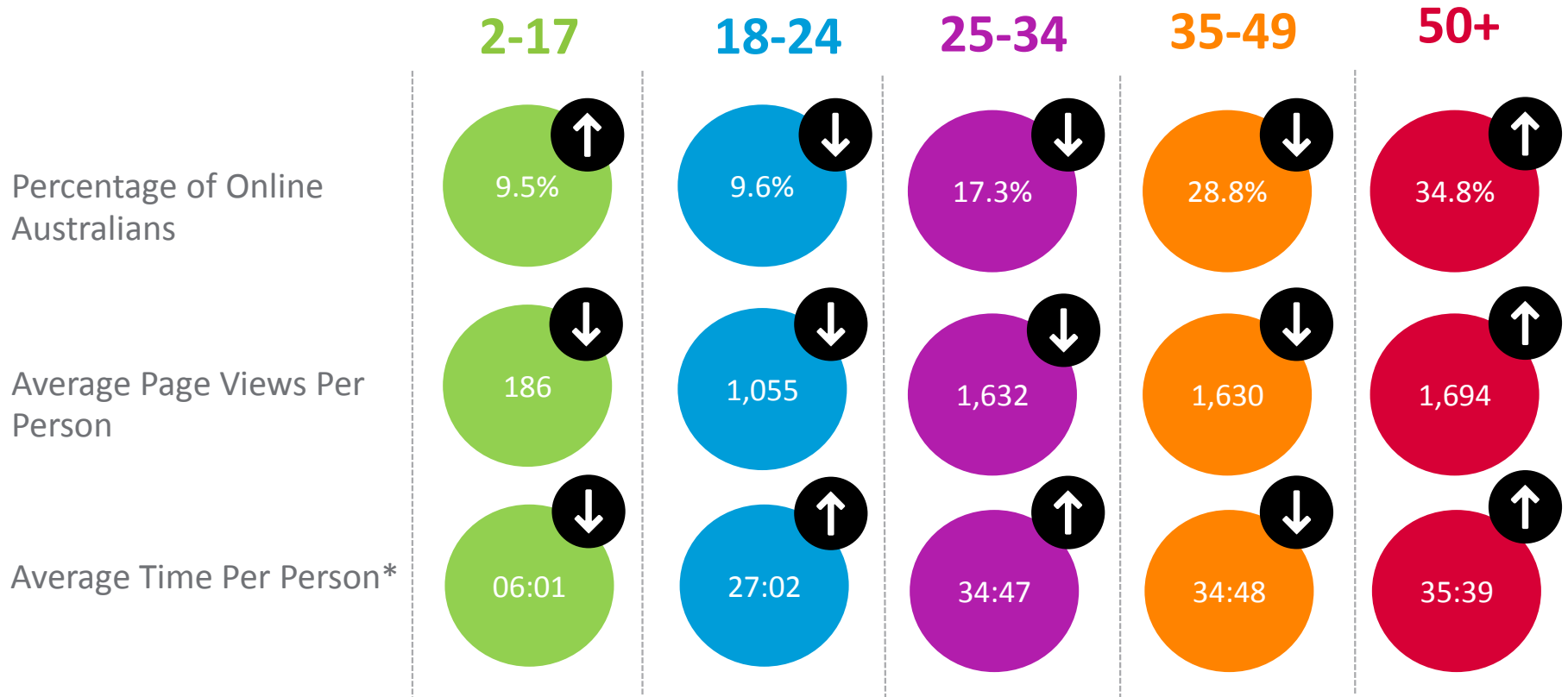


ABC Online Network continues to see growth in unique audiences, holding the highest skew towards those aged 50+ at 43.7%. Over one third of Apple's audience was aged between 35-49 at 34.0% having the highest skew for this age group.

YouTube and Apple captivated young audiences with Apple having the heaviest skew towards 18-24 year olds at 10.5% and YouTube having the heaviest skew towards 2-17 year olds at 9.6%.

HYBRID SURFING: DEMOGRAPHICS

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



2 out of the 5 age groups experienced increases this month. Time per person for Australians aged 25-34 years old have increased by almost an hour. The composition of unique audience shifted to Australians aged 50+.

↑ ↓ Indicates growth or decline based on the previous month

*HH:MM

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HIGHLIGHTS

NIELSEN ONLINE RATINGS: HYBRID STREAMING

HYBRID STREAMING KEY ONLINE STATISTICS

October 2015



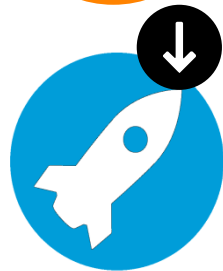
3.3 billion streams watched.



7 billion minutes streamed.



8 hours and 27 minutes spent streaming per person.



12,984,000 people were actively streaming online.

HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

October 2015

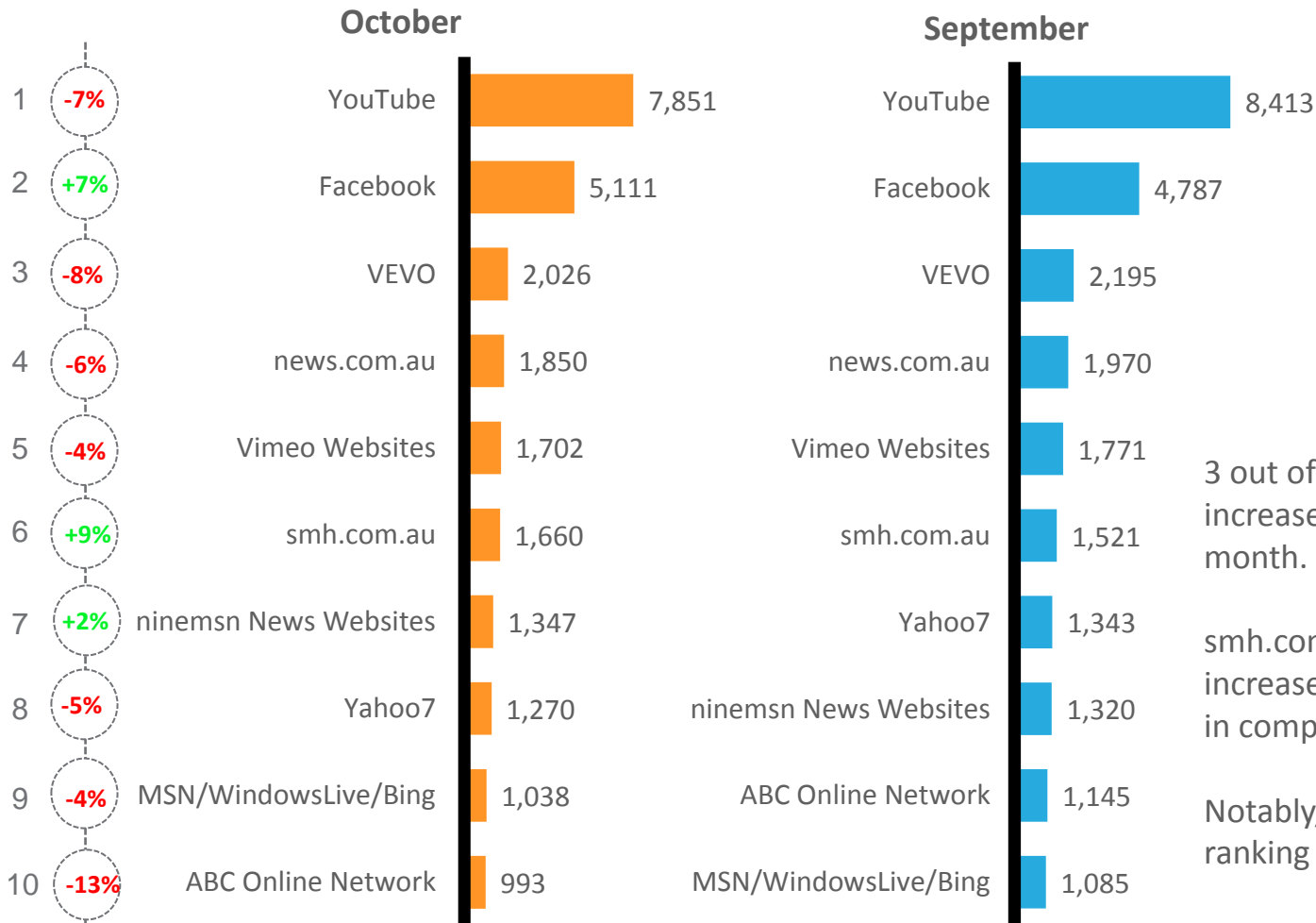
Unique Audience Rank	Brand	Unique Audience (000s)	Total Streams (000s)	Time Per Person (hh:mm:ss)
1	YouTube	7,851	1,916,152	07:06:40
2	Facebook	5,111	179,338	01:42:51
3	VEVO	2,026	154,512	01:47:51
4	news.com.au	1,850	16,026	00:08:37
5	Vimeo Websites	1,702	5,861	00:08:44
6	smh.com.au	1,660	7,167	00:05:28
7	ninemsn News Websites	1,347	13,343	00:09:31
8	Yahoo7	1,270	18,694	00:35:48
9	MSN/WindowsLive/Bing	1,038	6,820	00:05:25
10	ABC Online Network	993	5,394	01:52:42

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, October 2015

TOP BRANDS COMPARISON – HYBRID STREAMING

October 2015, Unique Audience (000s)



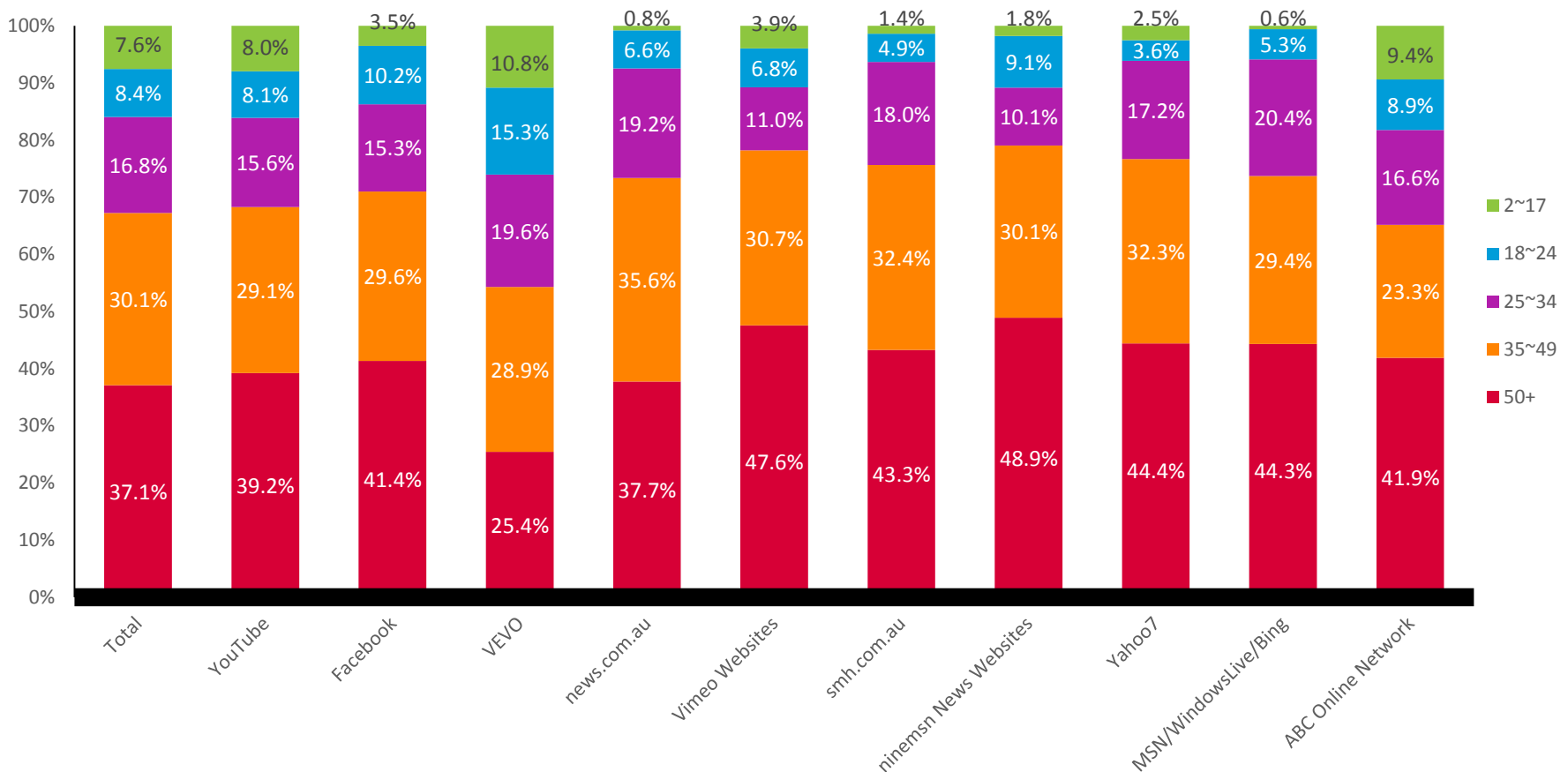
3 out of the top 10 sites reported increases in Unique Audience this month.

smh.com.au experienced a 9% increase in streaming Australians in comparison to last month.

Notably, Facebook grew by 7%, ranking strong on second position.

TOP 10 STREAMING BRANDS BY AGE

Unique Audience (Streaming): October 2015

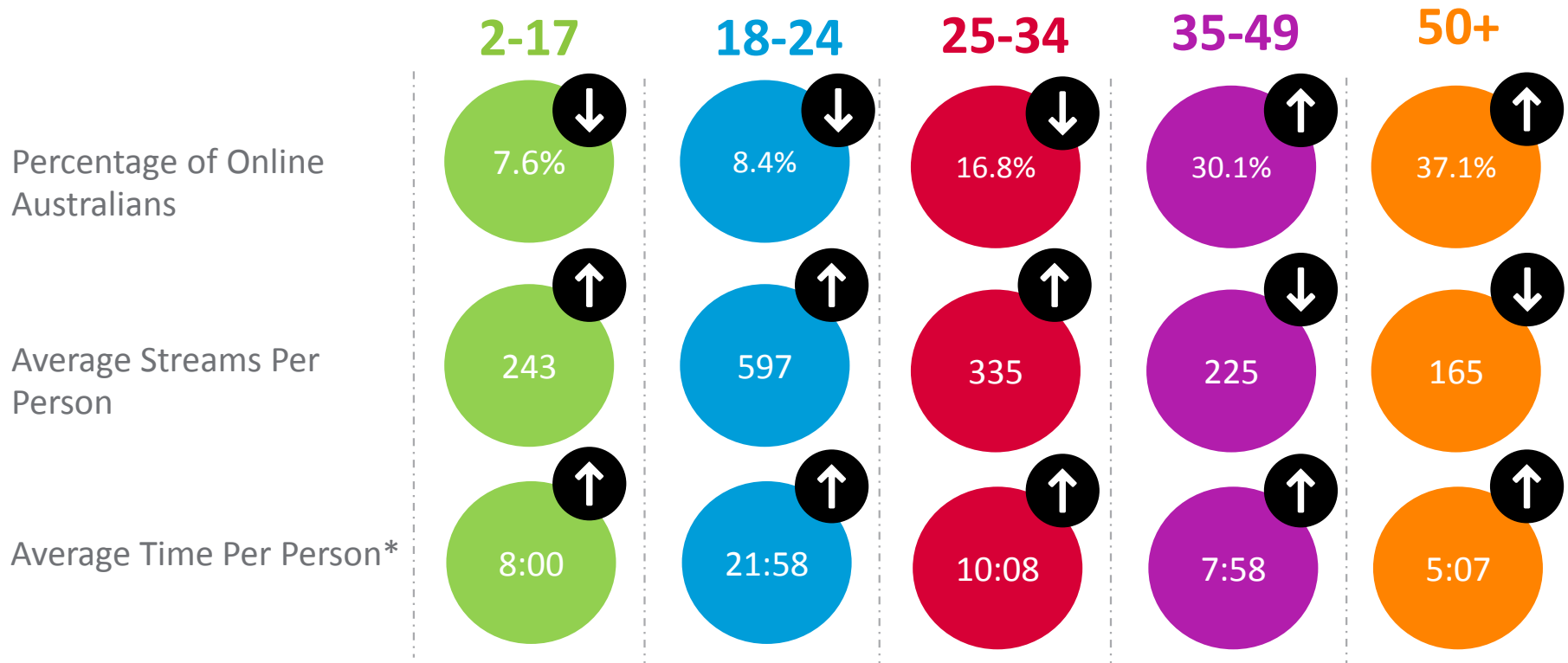


Ninensn News Websites continues to have the highest proportion of streaming Australians aged over 50, with almost half their audience falling into that age group. VEVO reported the highest skew towards those aged between 18-24 years old at 15.3%.

3 in 4 Australians who stream on Yahoo7 are above the age of 35.

HYBRID STREAMING: DEMOGRAPHICS

October 2015



All the age groups experienced increases in time per person this month.

Streams per person for the younger audiences experienced growth, with those aged 18-24 streaming an additional 7 hours and the 25-34 year olds spending an extra 2 hours this month.

↑ ↓ Indicates growth or decline based on the previous month

*HH:MM

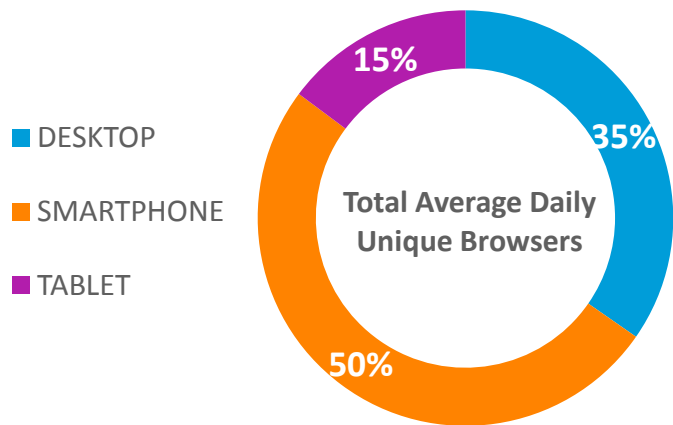
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DEVICE HIGHLIGHTS

NIELSEN ONLINE RATINGS: MARKET INTELLIGENCE

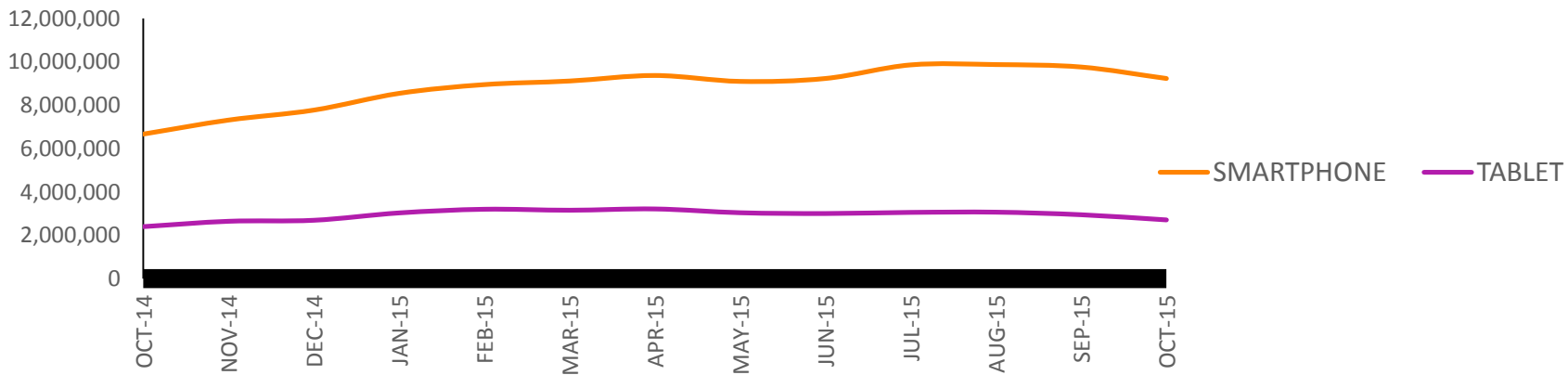
SITES ARE BROWSED MORE ON PORTABLE DEVICES

October 2015 – Market Domain – Domestic Traffic



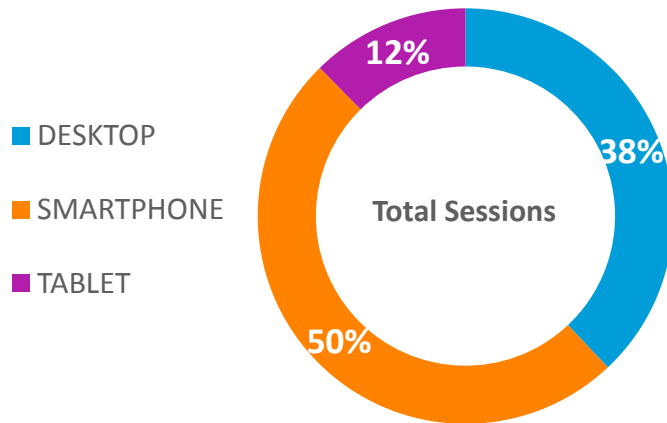
65% of total average daily unique browsers came from portable devices.

32% increase since October 2014 in total average daily unique browsers from portable devices



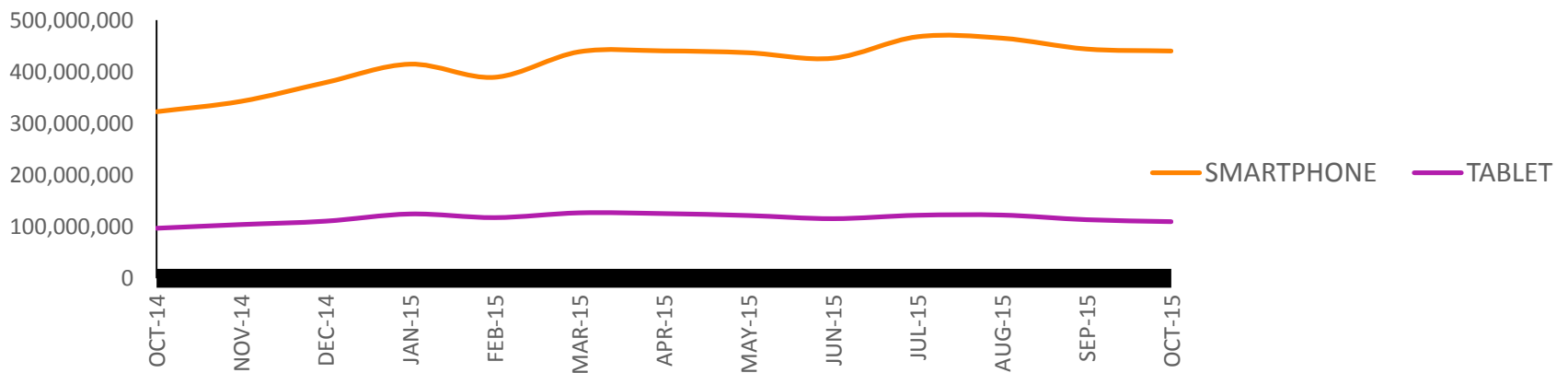
SESSIONS ON PORTABLE DEVICES HAS GROWN 31% IN A YEAR

October 2015 – Market Domain – Domestic Traffic



62% of total online sessions came from portable devices

31% increase since October 2014 in total online sessions from portable devices



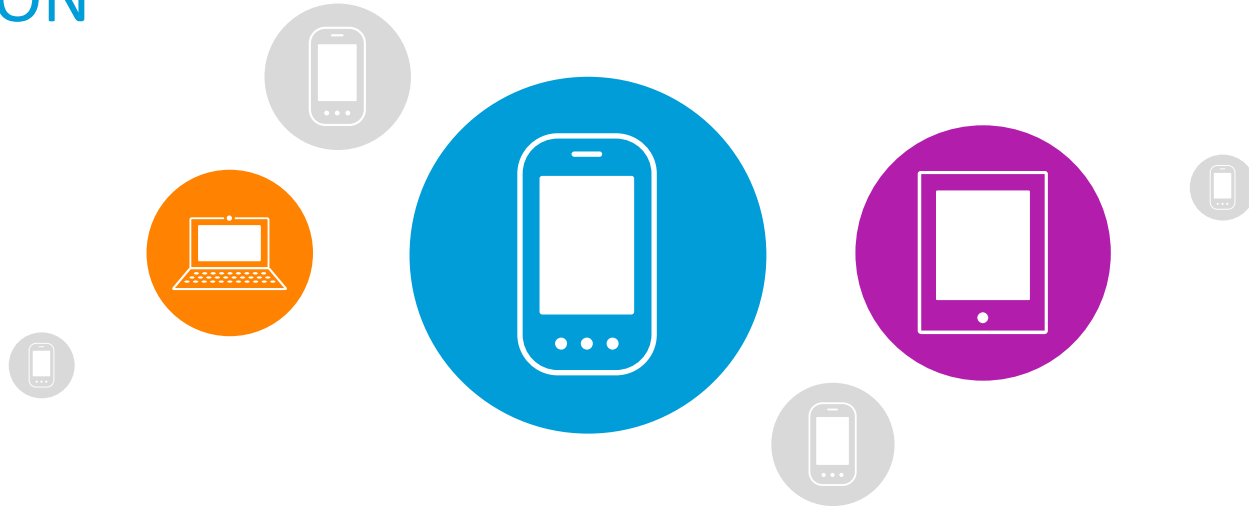
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GENERAL UPDATES FOR THIS MONTH:

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MOBILE CONTENT MEASUREMENT

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 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](#).

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MOBILE CAMPAIGN MEASUREMENT

MOBILE AD MEASUREMENT IS HERE!

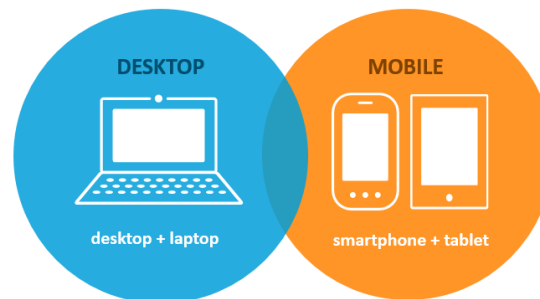
Nielsen's Mobile Digital Ad Ratings (formerly OCR), enables Australian advertisers for the first time to have access to mobile digital campaign measurement. This expansion of mobile ad measurement in Australia, including mobile video and display, gives the industry "Total Digital" ad measurement and unlocks the ability to understand a campaign's total unduplicated audience across all devices as well as separately by computer and mobile.

From the campaigns we've measured in AU since we launched Mobile Digital Ad Ratings on October 1st:

- 2 in every 3 campaigns measured with Digital Ad Ratings since October 1st have included a mobile component
- More than 125 million impressions have been measure since October 1st
- TubeMogul are certified with Nielsen Digital Ad Ratings for in-app ad measurement in Australia

Fore more details, click [here](#).

MOBILE DIGITAL AD RATINGS



YOUR ENTIRE DIGITAL AUDIENCE

Total unduplicated audience + the audience on each platform

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, purple) that form a partial view of a sphere or a complex, curved surface. Several small, colored dots (yellow, green, purple, red) are placed on the surface, with thin lines extending from them towards the center of the sphere.

**MORE SITES, MORE DEVICES AND MORE
FLEXIBILITY!**

NIELSEN AND PATHMATICS TO ENABLE ADVERTISER-LEVEL DATA ACROSS MULTIPLE DIGITAL DEVICES



Pathmatics and Nielsen have announced a cutting-edge alliance that sees Nielsen provide Australian marketers with detailed advertiser-level impression data and ad creatives from multiple digital devices. This new, rich set of data is a crucial first step to developing digital ad spend data by advertiser, by device and by day.

[READ MORE ABOUT THIS ANNOUNCEMENT HERE](#)

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NIELSEN TWITTER TV RATINGS: MONTHLY TOP 5

NIELSEN TWITTER TV RATINGS

Nielsen Twitter TV Ratings - October, 2015
 Monthly Top Five - Sport



Rank	Network	Program	Date	Unique Audience	Impressions
1	SEVEN	AFL Grand Final Hawthorn v West Coast	03/10/15	251.1K	8.9M
2	NINE	NRL Grand Final Broncos v Cowboys	04/10/15	224.9K	7.9M
3	*TEN, FOXSPORTS5	V8 Supercars Bathurst 1000 Day 3	11/10/15	162.9K	2.4M
4	*GEM, FOXSPORTS2	Rugby World Cup 2015 Australia v England	04/10/15	141.6K	1.4M
5	*FOXSPORTS5, TEN	V8 Supercars Bathurst 1000 Day 1	09/10/15	122.0K	840.6K

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 - October, 2015
 Monthly Top Five - Non Sport



Rank	Network	Program	Date	Unique Audience	Impressions
1	TEN	The Bachelorette Australia (Finale)	22/10/15	141.5K	4.5M
2	TEN	The Bachelorette Australia	21/10/15	89.8K	1.7M
3	ABC	Four Corners (Michael Lawler)	19/10/15	82.0K	1.7M
4	NINE	The Verdict (Premiere)	08/10/15	74.9K	793.0K
5	TEN	The Bachelorette Australia	15/10/15	72.7K	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. Non-sport includes live/new episodes only.



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AN UNCOMMON SENSE
OF THE CONSUMER™

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