



nielsen

THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

OCTOBER 2013



STATE OF THE ONLINE LANDSCAPE

October 2013

Welcome to the October 2013 edition of Nielsen's Online Landscape Review.

During October 2013 there were **16.2** million Australians active online. They spent an average of **40** hours and **19** Minutes per person (an increase of almost **3** hours on September 2013) across **63** browser sessions during the month

For sites under measure via Nielsen Market Intelligence, 44% of daily unique browsers for the period were via a mobile device or a tablet.

This month we also look at the engagement of major financial institution websites, and speaking of tablets - we examine the impact of an Apple product launch on traffic to the Consumer Electronics category in Australia.


Finally, for all Nielsen Online Ratings clients, please note that data for the month of November 2013 will be released on December 14, and will subsequently be released on the 14th of each month, a four day improvement on previous.

If you'd like to know more about any of the data presented within this report, 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 (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 center or other parts of the sphere.

HIGHLIGHTS: OCTOBER 2013

NIELSEN ONLINE RATINGS: HYBRID



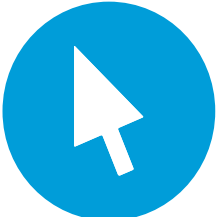
“Online advertising has continued its strong growth, exceeding \$1bn in the September 2013 quarter while recording 25% growth year on year from September 2012 and 4.6% on the prior quarter”

AT A GLANCE: THE ONLINE LANDSCAPE

October 2013



16.2 million unique Australians.



31.8 billion viewed pages.



39.2 billion minutes spent.



40 hours spent, across **63** sessions.



816.7 million mobile page impressions.



TOP 10 BRANDS RANKED BY UNIQUE AUDIENCE

October 2013

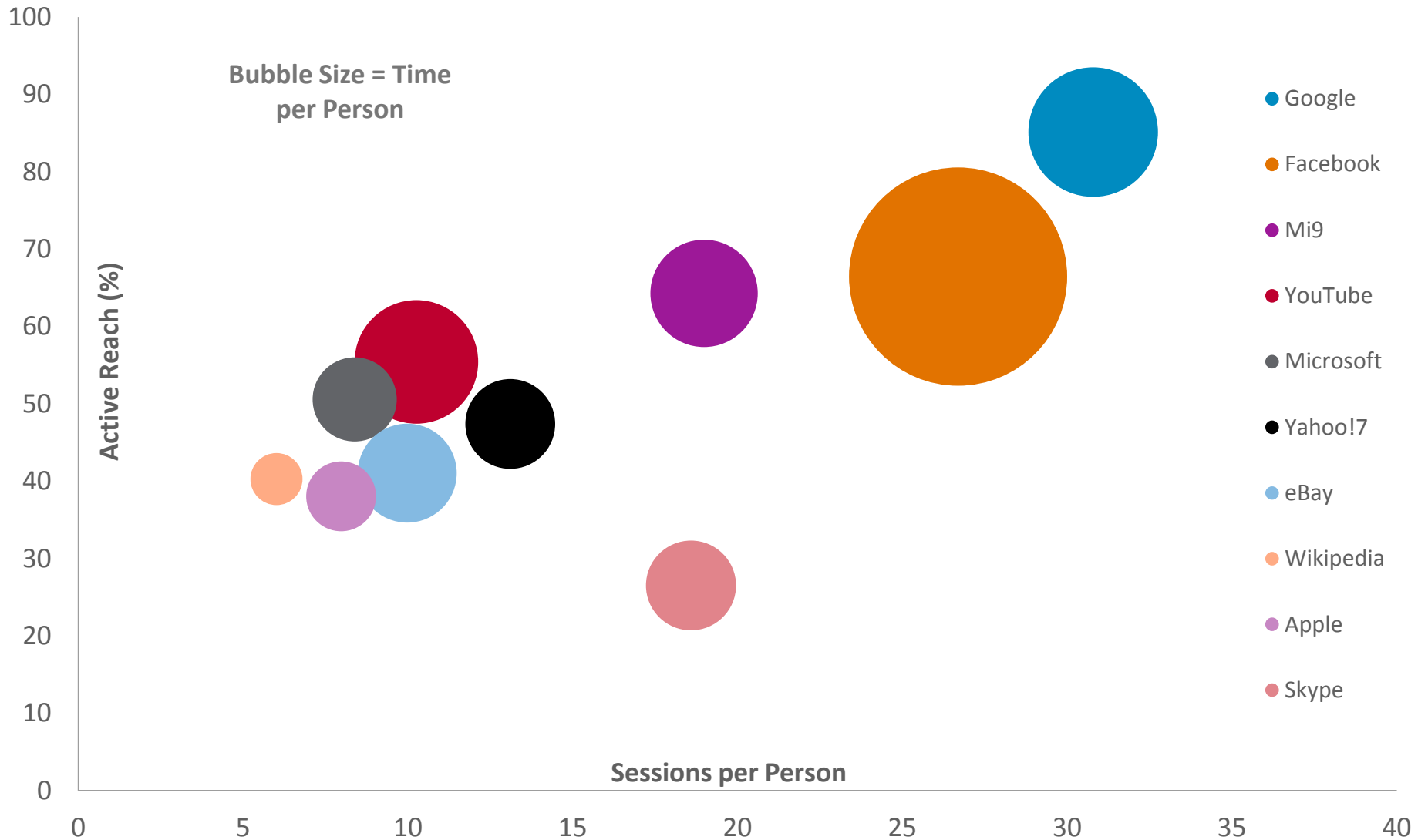
Brands	Unique Audience (000s)	Page Views (000s)	Average Time Spent (HH:MM:SS)
Google	13,812	3,821,592	03:20:08
Facebook	10,782	3,842,341	09:28:21
Mi9	10,431	1,358,524	02:17:16
YouTube	8,991	767,386	03:02:05
Microsoft	8,206	45,517	01:24:05
Yahoo!7	7,692	497,186	01:36:09
eBay	6,659	1,024,348	01:56:56
Wikipedia	6,537	148,127	00:32:10
Apple	6,173	40,366	00:58:07
Skype	4,306	5,314	01:36:27

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, October 2013

TOP 10 BRANDS AND THEIR ENGAGEMENT

October 2013



AGE DEMOGRAPHICS ONLINE

October 2013

2-17

Percentage of Online Aus

6.8%

Average Page Views

433

Av. Time Per Person*

11:42

18-24

Percentage of Online Aus

10.8%

Average Page Views

1,907

Av. Time Per Person*

44:55

25-34

Percentage of Online Aus

19.5%

Average Page Views

2,373

Av. Time Per Person*

45:51

35-49

Percentage of Online Aus

28.5%

Average Page Views

2,170

Av. Time Per Person*

44:12

50+

Percentage of Online Aus

34.4%

Average Page Views

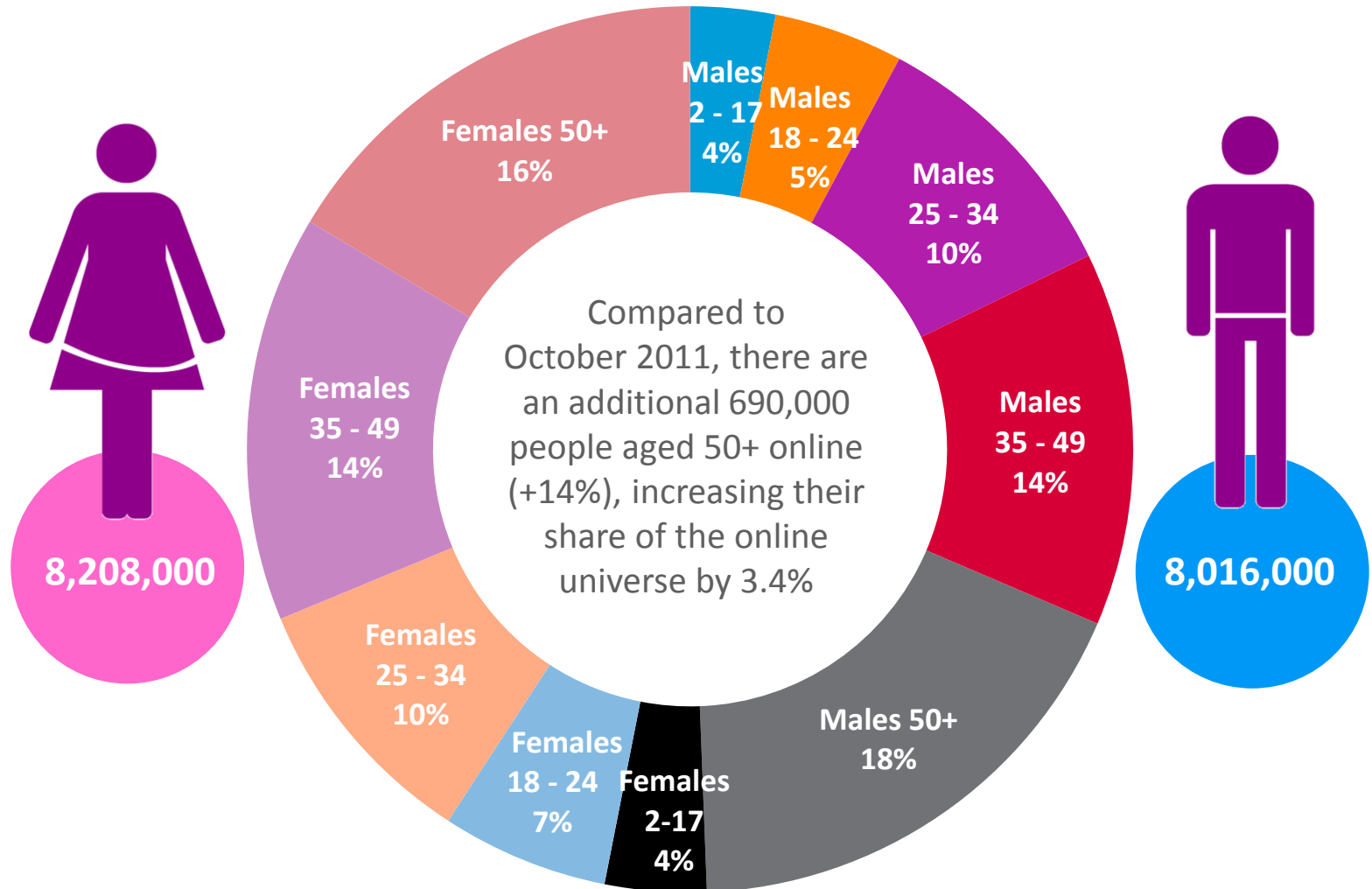
1,861

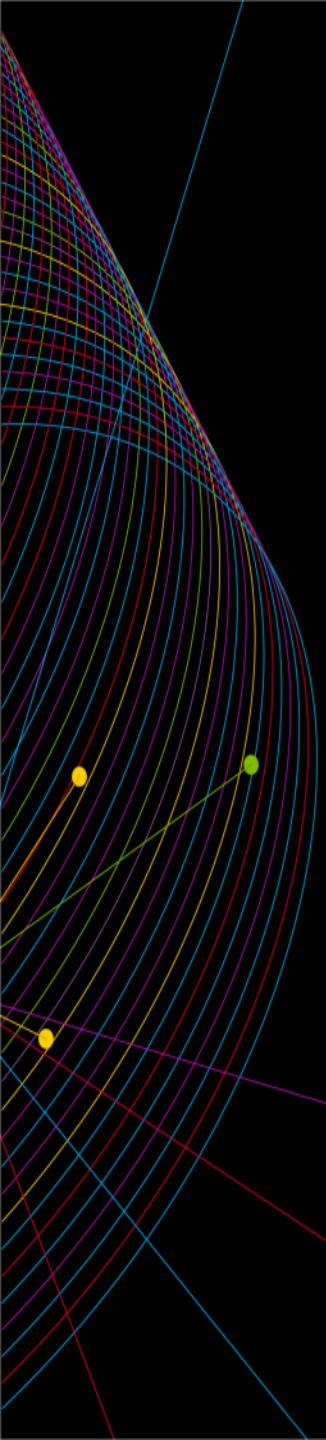
Av. Time Per Person*

38:09

GENDER BREAKDOWN

October 2013





NIELSEN ONLINE RATINGS – HYBRID CATEGORY ENGAGEMENT

TOP 10 NEWS SITES AND THEIR ENGAGEMENT

October 2013



UA Rank	Brands	Unique Audience (000's)	Active Reach %	Sessions Per Person	Time Per Person
1	news.com.au	2,947	18.16	12.08	01:35:25
2	smh.com.au	2,867	17.67	13.32	01:48:22
3	ninemsn News Websites	2,593	15.98	11.48	00:39:25
4	Yahoo!7 News Websites	2,254	13.89	6.24	00:21:10
5	ABC News Websites	2,066	12.74	9.14	00:41:11
6	The Age	1,551	9.56	14.17	01:26:19
7	Herald Sun	1,499	9.24	8.73	00:45:34
8	BBC	1,216	7.50	6.84	00:42:34
9	The Guardian	1,190	7.34	5.01	00:34:51
10	The Telegraph	1,185	7.30	7.26	00:36:57

Ranking within the Current Event & Global News Sub-Category

Source: Nielsen Online Ratings – Hybrid, October 2013

TOP 10 AUTOMOTIVE INFORMATION SITES AND THEIR ENGAGEMENT

October 2013



UA Rank	Sites	Unique Audience (000's)	Sessions Per Person	Time Per Person (HH:MM:SS)
1	carsales.com.au	1,148	7.20	01:37:18
2	Drive.com.au	714	3.46	00:11:11
3	carsGuide.com.au	513	3.45	00:21:45
4	CarAdvice	198	3.26	00:22:18
5	eBay Motors	188	2.13	00:04:18
6	BigPond Tradingpost.com.au Automotive	188	2.84	00:16:49
7	rac.com.au	174	2.12	00:09:03
8	CarPoint.com.au	146	3.78	00:39:31
9	bikesales.com.au	145	3.67	01:12:13
10	The Red Book	136	3.45	00:22:03

Ranking within the Automotive Information Sub-Category

Source: Nielsen Online Ratings – Hybrid, October 2013

TOP 10 FINANCE BRANDS AND THEIR ENGAGEMENT

October 2013



UA Rank	Sites	Unique Audience (000's)	Sessions Per Person	Time Per Person
1	PayPal	3,961	4.19	00:11:46
2	Commonwealth Bank	3,274	9.12	00:40:43
3	ANZ	2,007	8.24	00:47:35
4	National Australia Bank	1,969	8.91	01:07:56
5	Westpac Banking	1,892	9.63	00:56:25
6	St.George	905	6.18	00:35:17
7	Suncorp Metway	851	4.77	00:23:04
8	BankWest	627	6.63	00:37:20
9	American Express	620	4.04	00:20:45
10	ING Direct	610	5.55	00:27:51

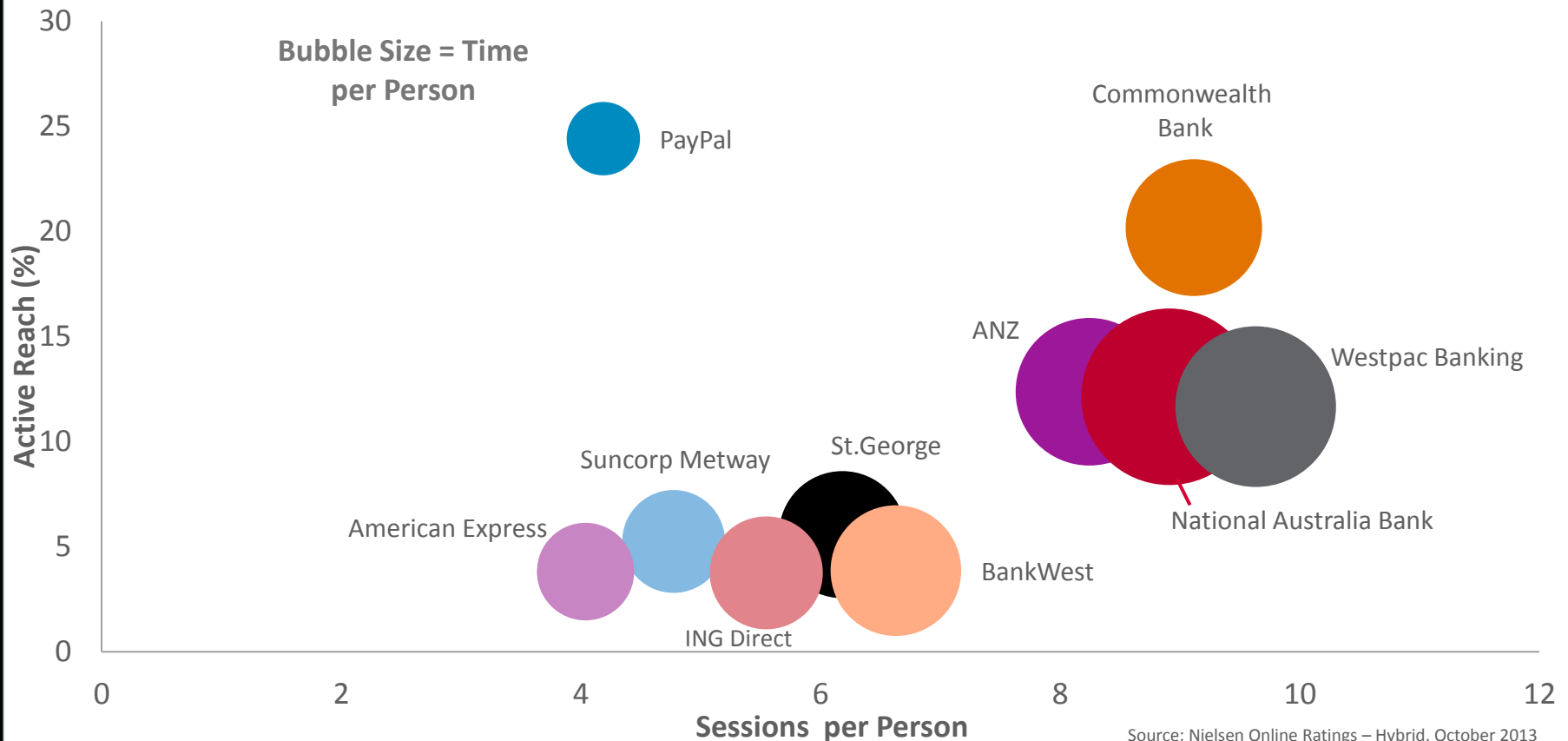
Ranking of Brands within the Finance/Insurance/Investment Category

Source: Nielsen Online Ratings – Hybrid, October 2013

ENGAGEMENT OF FINANCE BRANDS

The below chart illustrates key Finance/Insurance/Investment sites and their engagement. Below we can differentiate between a major e-commerce payment facilitator, “the big four” banking institutions and other financial institutions.

While PayPal has the highest Active Reach and Unique Audience within the category for the period, it has a much lower number of sessions per person. This is reflective of ecommerce purchasing frequency comparative to the regularity of general banking online.



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

HIGHLIGHTS: OCTOBER 2013

NIELSEN ONLINE RATINGS: HYBRID STREAMING



“For the first half of 2013, Australian video advertising experienced revenue growth of 52% on the previous year, second only to the UK market which recorded 85% growth.”

HYBRID STREAMING KEY ONLINE STATISTICS

October 2013

This month showed a similar streaming Audience to last month, however an increase in streams, minutes and time per active user.



12.1 million unique Audience.



1.5 billion streams.



4.2 billion minutes.



5 hours and 44 mins spent per active user.



HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE*

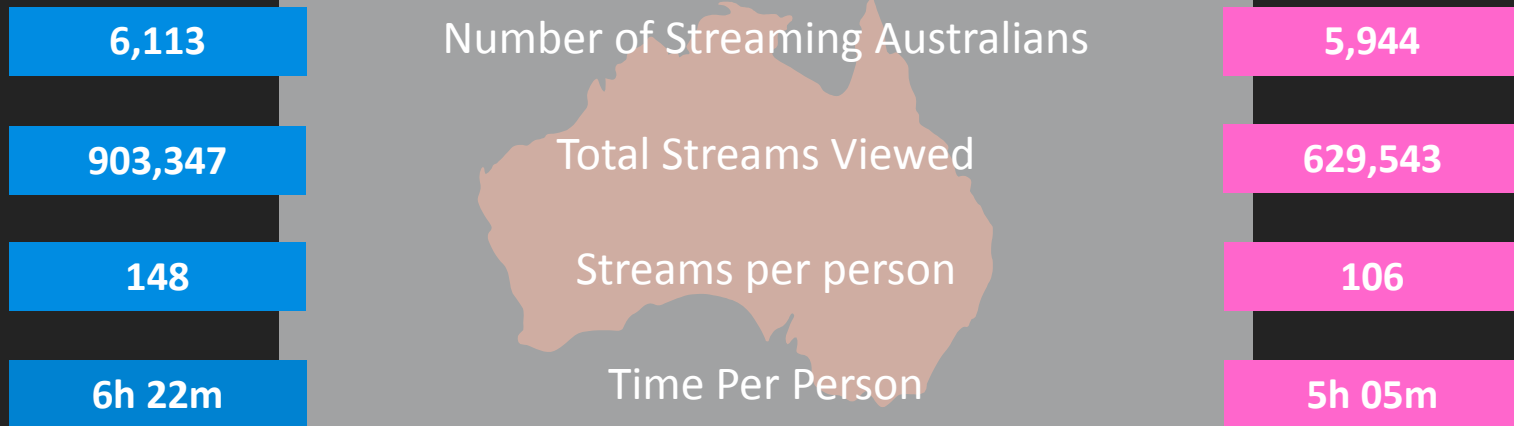
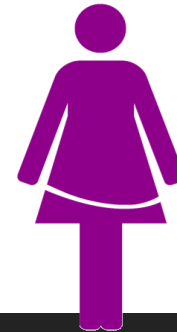
October 2013

Brands	Unique Audience (000s)	Total Streams (000s)	Average Time Spent (HH:MM:SS)
YouTube	10,281	975,087	03:48:19
Facebook	3,853	83,296	00:30:27
VEVO	2,300	57,979	00:59:24
Mi9	2,296	75,749	01:00:46
The CollegeHumor Network	1,593	5,000	00:11:44
Yahoo!7	1,586	9,159	00:22:59
ABC Online Network	1,265	14,869	02:01:00
smh.com.au	1,035	5,106	00:09:49
Google	920	16,498	03:04:55
Dailymotion	667	42,033	01:53:42

* News Corp Australia transitioned to a new video player resulting in incorrect tagging data for the month. Nielsen and News agreed to withhold the data for the period to ensure accuracy and consistency of reporting to market.

HYBRID STREAMING: DEMOGRAPHIC BREAKDOWN

October 2013



Overall this month the number of males streaming video content decreased, however 300,000 more streams were recorded resulting in an additional hour of time per person. The number of females streaming video content decreased slightly, but still recorded a slight increase in number of streams, Streams Per Person and Time Per Person.

HYBRID STREAMING: AGE DEMOGRAPHICS

October 2013

2-17

Percentage of Online Aus **5.5%**

Average Streams **135**

Average Time (HH:MM) **6:43**

18-24

Percentage of Online Aus **11%**

Average Streams **231**

Average Time (HH:MM) **12:36**

25-34

Percentage of Online Aus **20.4%**

Average Streams **183**

Average Time (HH:MM) **7:41**

35-49

Percentage of Online Aus **28.7%**

Average Streams **115**

Average Time (HH:MM) **5:15**

50+

Percentage of Online Aus **34.9%**

Average Streams **71**

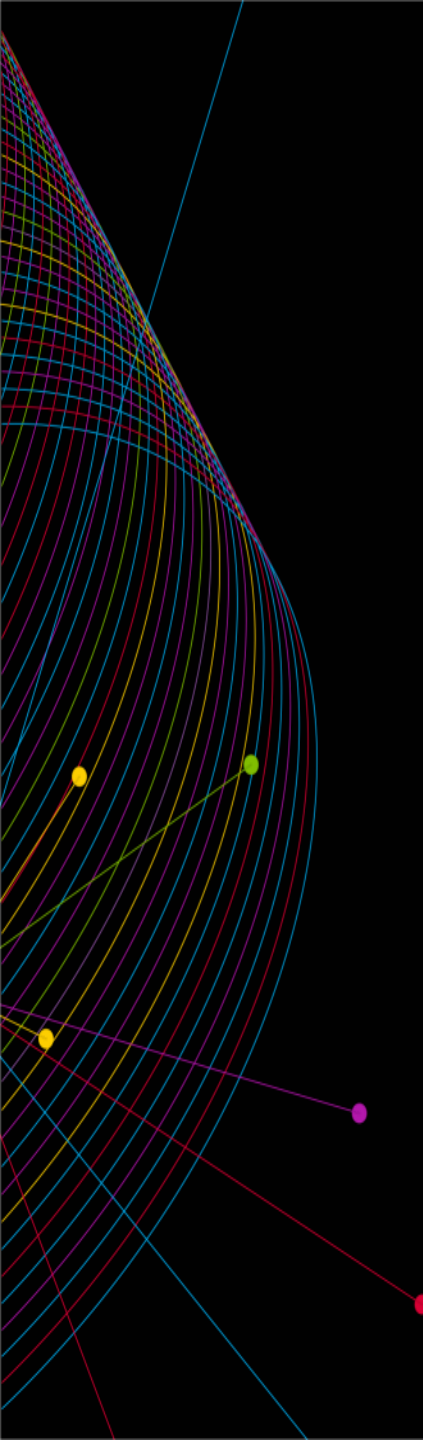
Average Time (HH:MM) **2:45**



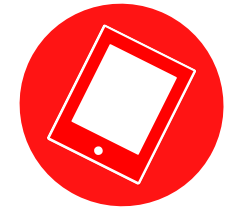
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MOBILE UPDATE: OCTOBER 2013

NIELSEN MARKET INTELLIGENCE

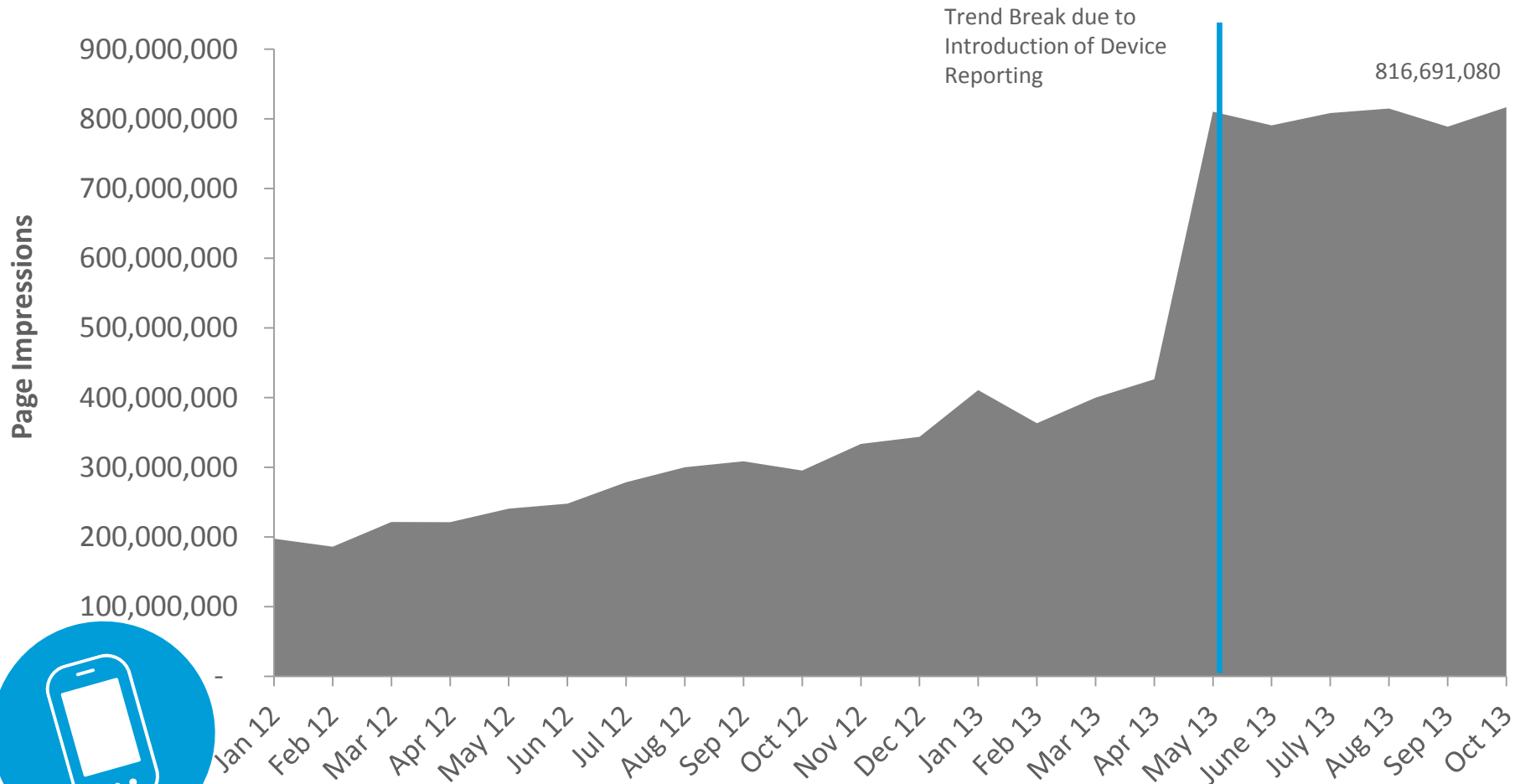


“ Click through rates on mobile banner ads can see an uplift of between 40-50% if the user is within a 2 mile radius of the business in question. ”



MOBILE PAGE IMPRESSIONS

October 2013

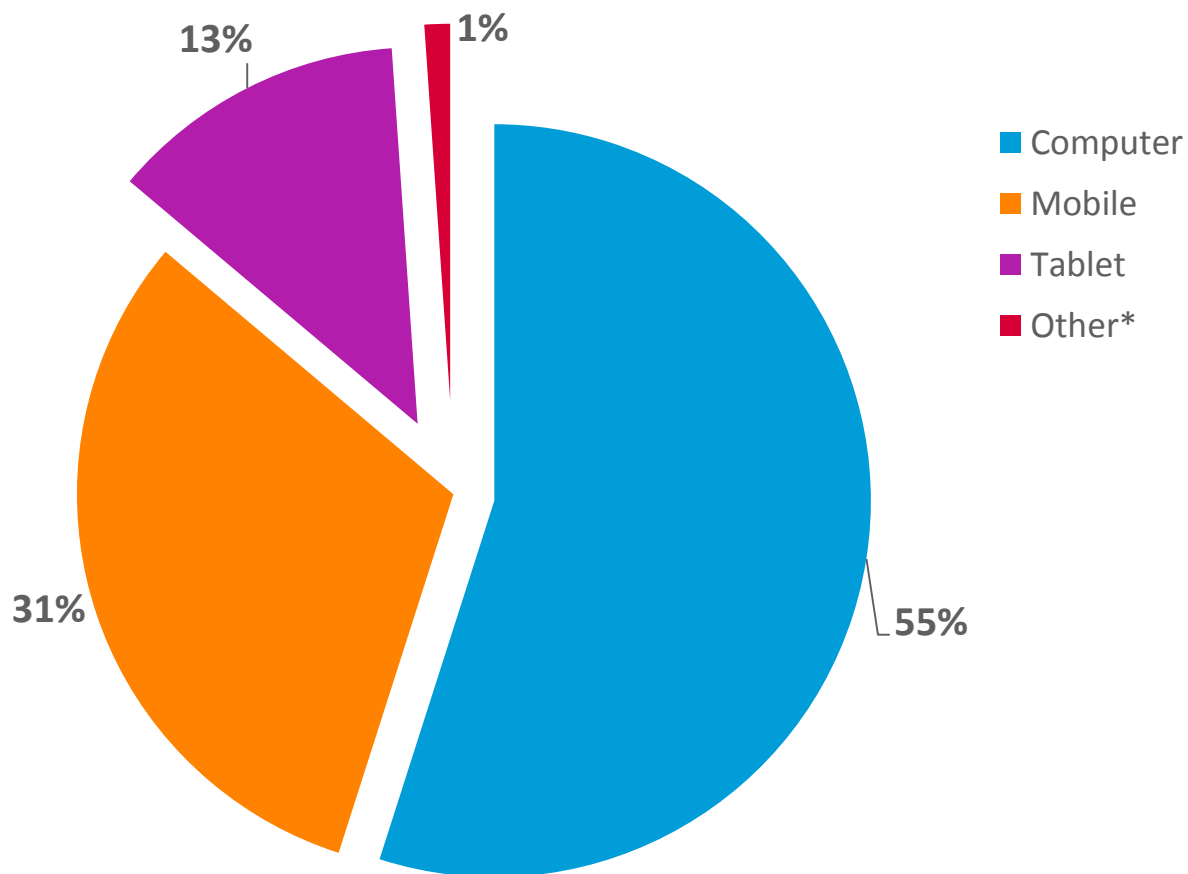


DEVICE TYPE COMPARISON

TOTAL AVERAGE DAILY UNIQUE BROWSERS

October 2013

44% of Average Daily Unique Browsers came from a mobile or tablet device, a 3% increase from September.



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

An abstract graphic on the left side of the slide. It features a series of concentric, overlapping lines that form a spherical shape. The lines are colored in a spectrum including blue, green, yellow, orange, and red. Several small, colored dots (yellow, green, purple, red) are placed at various points along these lines, with thin lines extending from them towards the center of the sphere.

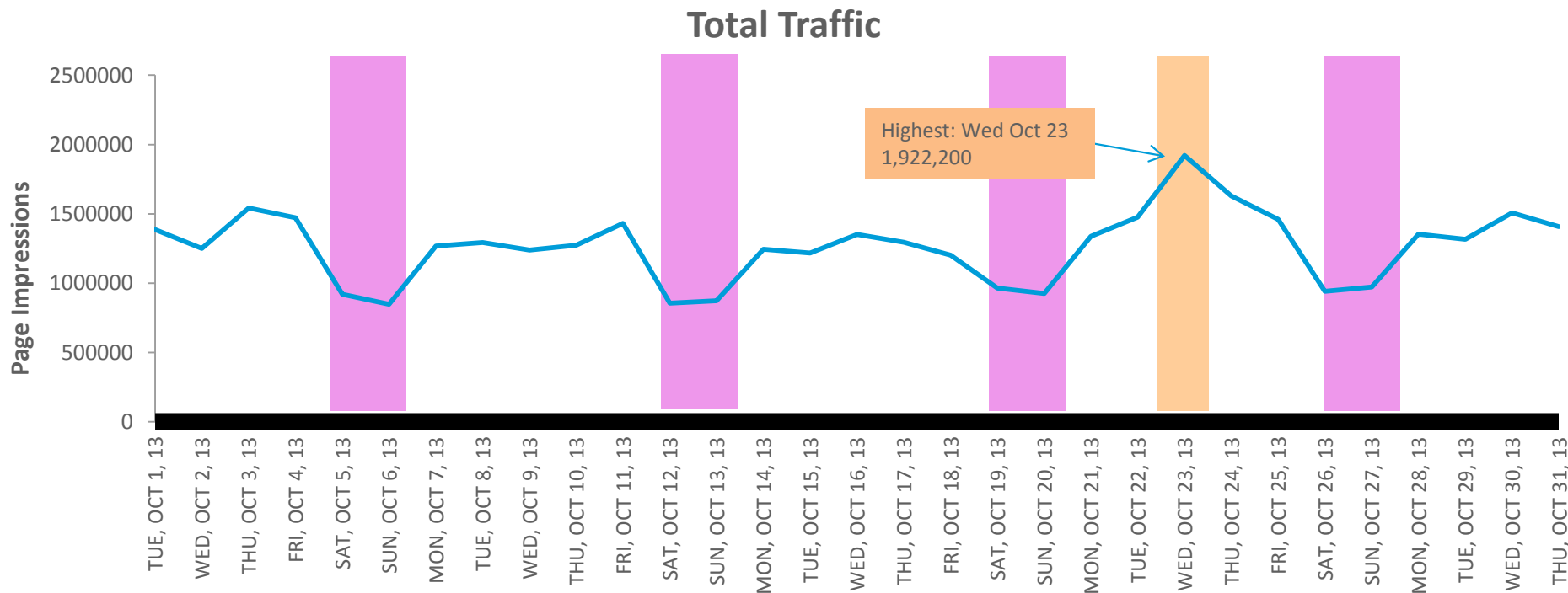
MARKET INTELLIGENCE

CATEGORY SPOTLIGHT: CONSUMER ELECTRONICS

CONSUMER ELECTRONICS – THE IMPACT OF A NEW IPAD

October 2013

When looking at Consumer Electronics sites for the period, it is notable that Page Impressions consistently decline on weekends, indicating reduced browse and search behaviour on those sites. On Wednesday October 23rd, to coincide with the launch of the new iPad, traffic to the category peaked at almost 2 million page impressions on one day – a lift of more than 25% from the prior week. (Indicated in Orange).



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HINTS AND TIPS FOR USING NIELSEN DATA

HINTS AND TIPS FOR ACTIONABLE INSIGHTS



Finding the right data to address your business issues can be tricky, and there is a large amount of data within Nielsen Online Ratings that is of value.

Each month, we'll provide within this section some hints and tips for how to use the data, and what you see within the interface. We'll address frequently asked questions to help make the data more actionable.

If you'd like to request a training session at any time, speak with your Nielsen Account Manager or contact our support team on: careau@nielsen.com



NIELSEN ONLINE RATINGS – AUDIENCE PROFILE REPORT

October 2013

Audience profile reporting allows cross-demographic comparisons against entities, including categories and sub-categories. Users are able to cross compare and discover insights into audience at a site level as well as within their field of interest, with customisable metrics with a wide ranging list of demographics that pan over two pages, with comparable demographics such as Age, Sex, Income and Occupancy etc.

The screenshot displays the Nielsen Online Ratings Audience Profile Report interface. The interface is divided into several sections:

- Product Navigator:** Shows "Digital Content Measurement" selected.
- Report Navigator:** Shows "Quick Reports" selected (highlighted with a blue circle '2').
- Saved Templates:** Shows "Folders" with "Default Folder" and "Deleted Specs".
- Report Name:** "Audience Profile_NewReport" (highlighted with a blue circle '1').
- Report Layout:** Shows "Audience Profile" selected (highlighted with an orange circle '3').
- Selections:** Shows "Country: Australia", "Audience: Total", "Measurement Period: Aug 2013", and "Dataset: Surfing".
- Entities - Audience Profile:** Shows "Inc. Applications" checked (highlighted with a red circle '4').

NIELSEN ONLINE RATINGS – AUDIENCE PROFILE REPORT

October 2013

Below is the output for an Audience profile report for two randomly chosen brands (titles indicated by the purple and red indicators). We are able to cross compare these brands UA (additional metrics are also available to be chosen, grey) against the demographic categories (blue) and the targets themselves (orange).

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Report Manager | Report Builder | **Report Viewer** | User Preferences | Help

Audience Profile_NewReport

Measurement Period: Oct 2013 Audience: Total Country: Australia Dataset: Surfing [Edit Specification](#)

Entities:
Targets:

Items 1 to 100 of 145. Page 1 of 2 Go to Page:

Category	Target	Unique Audience (000)	Comp Index by Page Views	Comp Index by Unique Audience	Page Views Composition (%)	Unique Audience Composition (%)	Unique Audience (000)	Comp Index by Page Views	Comp Index by Unique Audience	Page Views Composition (%)	Unique Audience Composition (%)
ALL	Total	10,782	100	100	100.00	100.00	13,812	100	100	100.00	100.00
GENDER	Male	5,239	80	98	40.70	48.59	6,832	103	100	52.65	49.4
	Female	5,543	121	102	59.30	51.41	6,980	97	100	47.35	50.5
PERSONS AGE	2-11	148	90	53	0.28	1.38	309	86	86	0.27	2.2
	2-15	286	100	61	0.67	2.65	550	106	91	0.71	3.9
	2-17	497	126	68	1.90	4.61	860	104	92	1.56	6.2
	6-11	121	103	53	0.27	1.12	264	92	91	0.25	1.9
	12-17	348	136	77	1.62	3.23	551	108	95	1.29	3.9
	12-24	1,550	140	96	16.39	14.38	2,030	106	98	12.42	14.70

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[Edit Specification](#) [Export](#)

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 center or outwards.

SITE CENSUS RETIREMENT

REMINDER: NIELSEN TO RETIRE SITECENSUS

October 2013

Nielsen continues to evolve its product portfolio and invest and focus on enhancing our digital measurement solutions to give you the best insights on the changing connected consumer.

To allow us to deliver this, we need to strongly align our focus on our areas of strength and retire any products that are not core to this business focus. We announced and communicated with clients back in February and March of this year that we would be retiring our web analytics product, Nielsen SiteCensus. With the impending retirement at the end of this year, please see key termination dates below:

- We will stop collecting and processing data for this product on January 1, 2014
- The last available dataset will be for the month of December 2013
- Access to the SiteCensus interface will continue for an additional two weeks to run any final reports – all access to the user interface will be closed from January 14, 2014 and there will be no extension to this service. We encourage you to run any historic reports you may require in the future, prior to the termination dates above and store them offline

We are proud of the intricate role SiteCensus has played in this market during the growth of many Australian online businesses over the last 15 years or more. However, we acknowledge that the value to our clients is not in this style of product going forward.

Please do not hesitate to contact your Nielsen Account Manager if you have any additional queries on this or contact careau@nielsen.com.

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NIELSEN'S 2014 AUSTRALIAN CONNECTED CONSUMERS REPORT

KEEP PACE WITH YOUR CONSUMERS' DIGITAL HABITS

NIELSEN'S 2014 AUSTRALIAN CONNECTED CONSUMERS REPORT

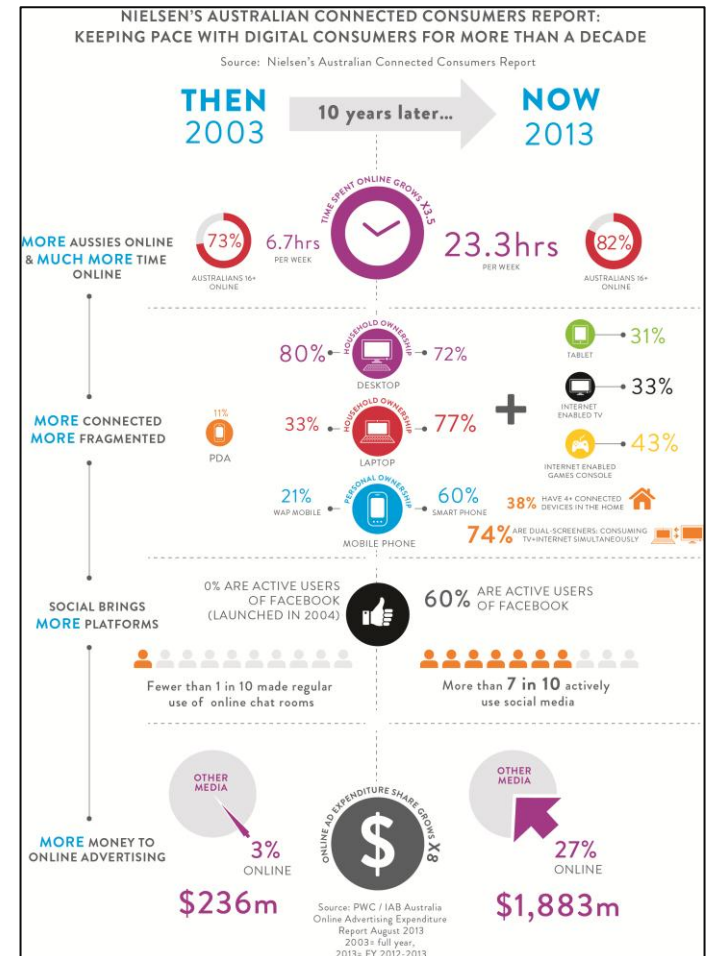
Technology, online conversations and new devices have all interrupted our old ways of finding consumers. More than ever we need a clear view of what is happening today and the implications for the coming years. That's where **Nielsen's Australian Connected Consumers Report** comes in.

Now in its 16th year we've been capturing and interpreting these trends for clients unlike anyone else. Companies large and small rely on us to help them understand the new digital landscape and help them finesse their strategies for today's connected consumer.

SPECIAL EARLY BIRD PRICING

Order before 20 December and you'll enjoy our special early-bird price – saving \$2,000. Keen to get your own customised input to the research design? Order your report before November 1st 2013 and get involved in the design of unique questions before we go to field.

For more information on the report and how you can take advantage of the early bird pricing, contact your Nielsen representative or email gabrielle.edmonds@nielsen.com



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AN UNCOMMON SENSE
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