

nielsen

THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

JANUARY 2014



STATE OF THE ONLINE LANDSCAPE

January 2014

Welcome to the January 2014 edition of Nielsen's Online Landscape Review.

The online landscape this month experienced an increased amount of time spent online, with more than 39 hours per person across 61 sessions.

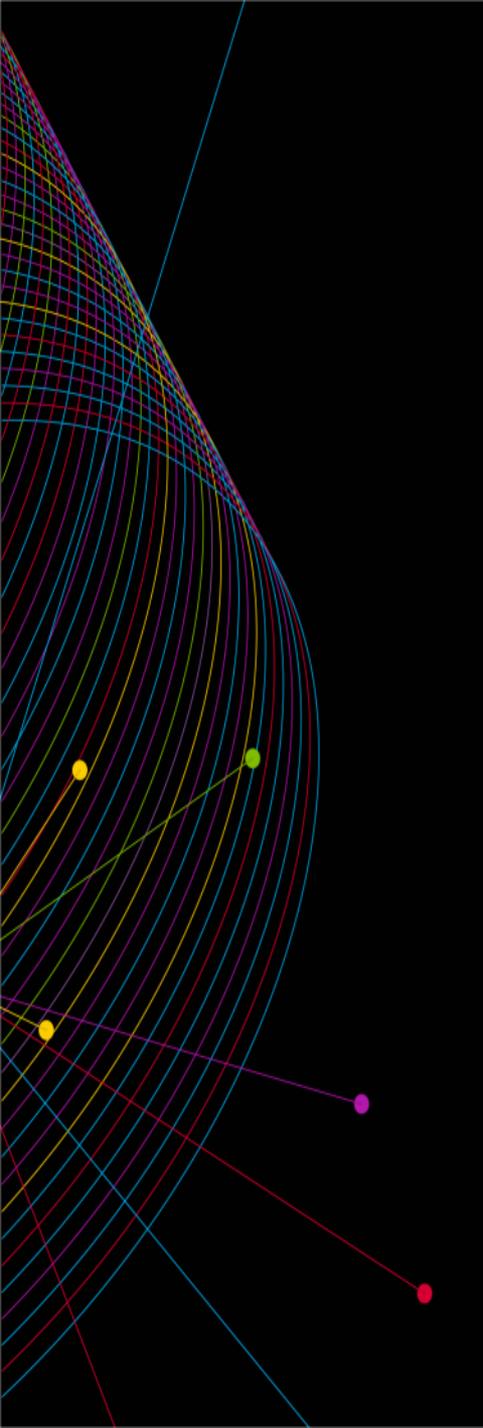
During January, mobile page impressions increased by almost 20 percent compared with December, signalling a return from the holiday period and a record-high for mobile traffic, since the current form of measurement commenced in May 2013.

Additionally this month, we investigate Travel, Education and Careers categories, all of which made substantial seasonal gains for the period.

During February, Nielsen will begin recruiting panellists for its closed pilot of a mobile and tablet device panel, and we will introduce the new Nielsen.com Australia website.

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 points on the sphere.

HIGHLIGHTS: JANUARY 2014

NIELSEN ONLINE RATINGS: HYBRID

A large, dark grey opening quotation mark.

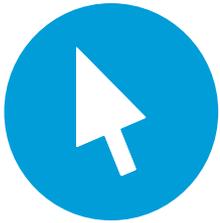
**38 PERCENT OF AUSTRALIAN
HOUSEHOLDS HAVE FOUR OR
MORE INTERNET ENABLED
DEVICES.**

A large, dark grey closing quotation mark.

AT A GLANCE: THE ONLINE LANDSCAPE

January 2014

This month saw an increase of 2.7 billion minutes spent following December of 2013 as well as an increase of three hours spent online.



29 billion viewed pages.

Nielsen Online Ratings – Hybrid, January 2014;



36.9 billion minutes spent.

Nielsen Online Ratings – Hybrid, January 2014;



39 hours spent online, across 61 sessions.

Nielsen Online Ratings – Hybrid, January 2014;



TOP 10 BRANDS AND THEIR ENGAGEMENT

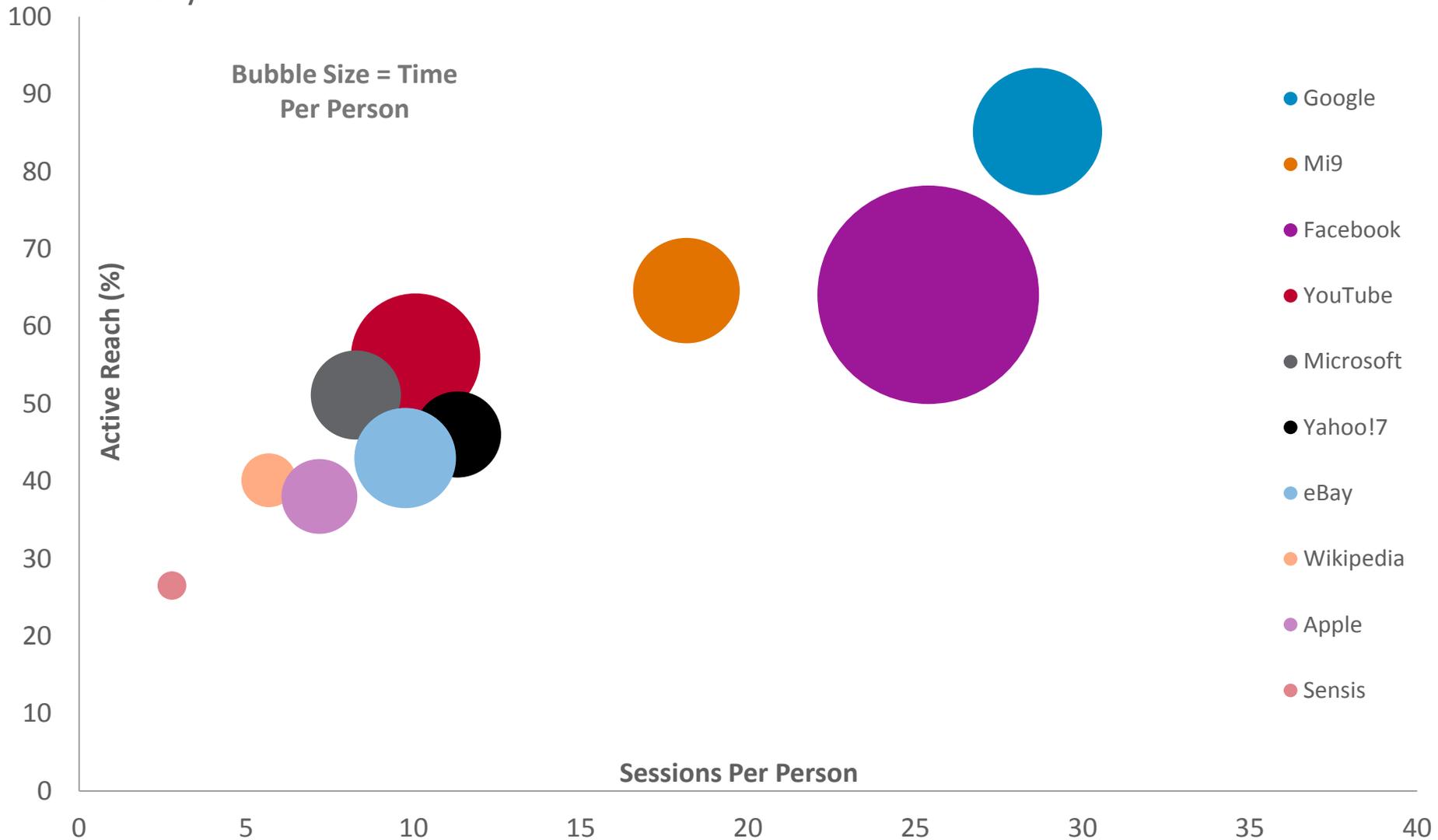
January 2014



UA Rank	Brands	Unique Audience (000's)	Page Views (000s)	Active Reach %	Sessions Per Person	Time Per Person
1	Google	13,367	3,368,646	85.20	28.65	02:58:11
2	Mi9	10,143	1,144,748	64.65	18.15	02:01:46
3	Facebook	10,056	2,959,875	64.10	25.38	08:43:16
4	YouTube	8,791	653,079	56.03	10.06	02:58:40
5	Microsoft	8,027	43,202	51.17	8.27	01:27:02
6	Yahoo!7	7,226	379,921	46.06	11.31	01:21:07
7	eBay	6,748	903,544	43.01	9.74	01:50:16
8	Wikipedia	6,299	150,758	40.15	5.67	00:31:56
9	Apple	5,973	38,007	38.07	7.19	01:01:22
10	Sensis	4,166	35,407	26.55	2.77	00:08:49

TOP 10 BRANDS AND THEIR ENGAGEMENT

January 2014



AGE DEMOGRAPHICS ONLINE

January 2014

2-17

Percentage of Online Aus

6.9%

Average Page Views

373

Av. Time Per Person*

10:02

18-24

Percentage of Online Aus

10.5%

Average Page Views

1,703

Av. Time Per Person*

41:18

25-34

Percentage of Online Aus

19.9%

Average Page Views

2,281

Av. Time Per Person*

44:37

35-49

Percentage of Online Aus

28.5%

Average Page Views

1,972

Av. Time Per Person*

42:38

50+

Percentage of Online Aus

34.2%

Average Page Views

1,844

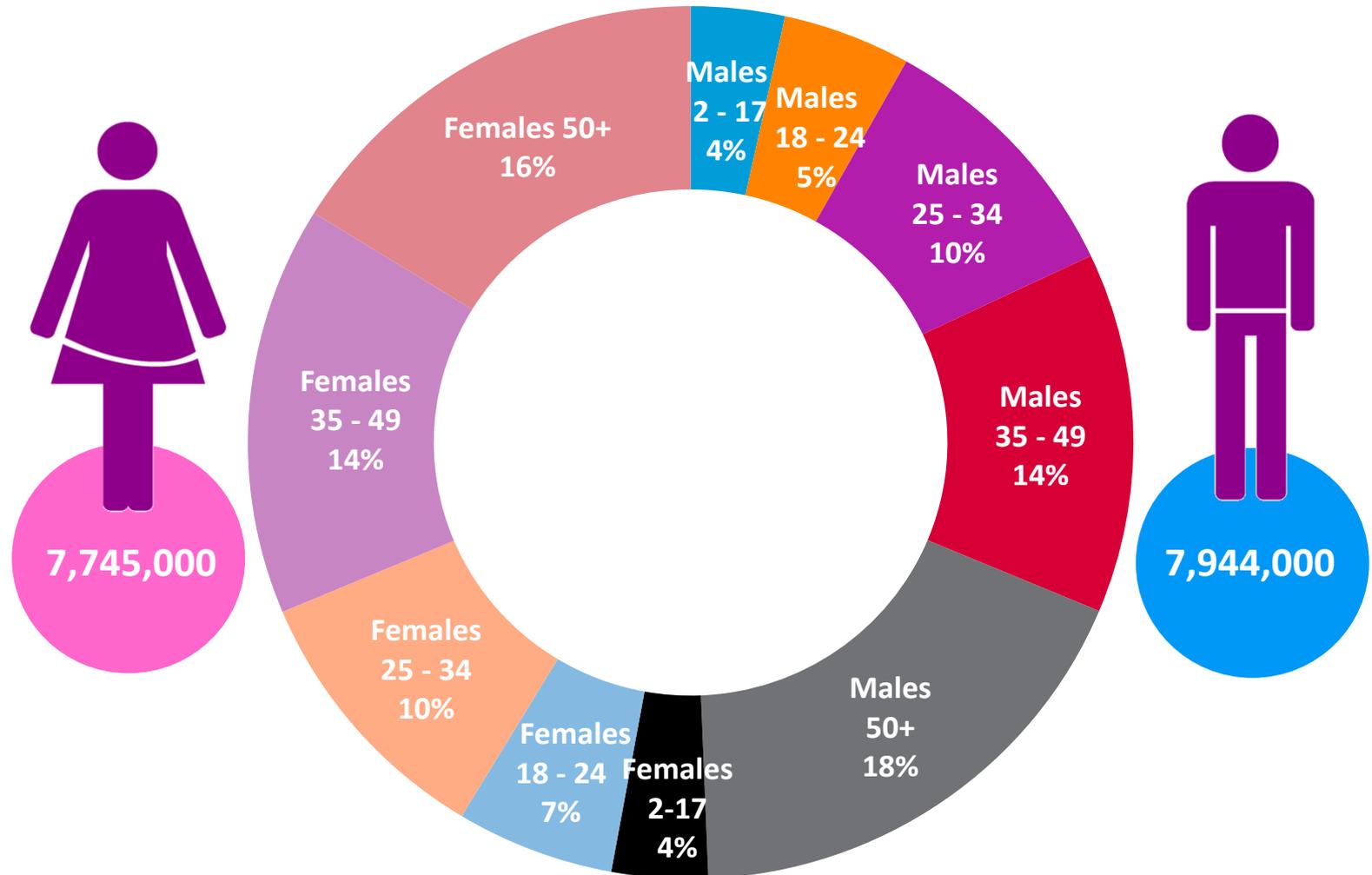
Av. Time Per Person*

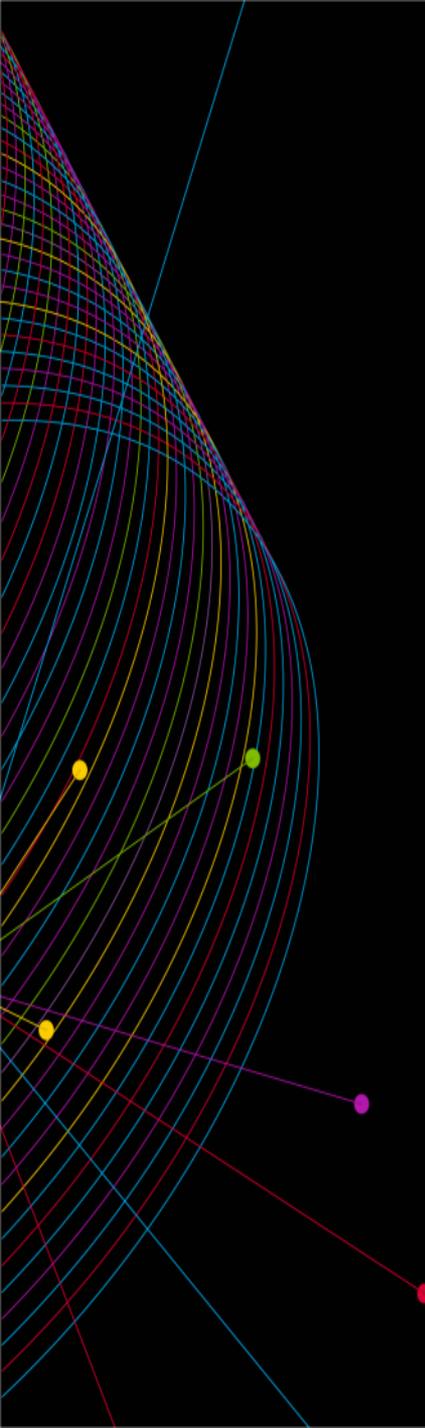
38:26



GENDER BREAKDOWN

January 2014





NIELSEN ONLINE RATINGS – HYBRID TRAVEL CATEGORY

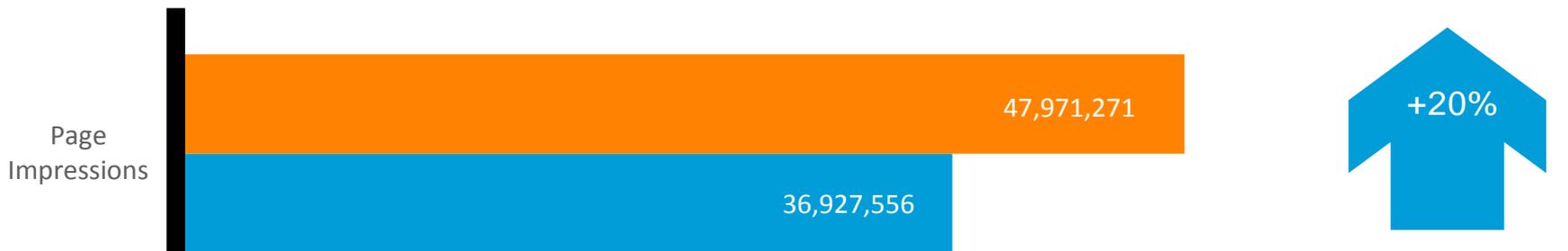
TOP 10 TRAVEL SITES BY UNIQUE AUDIENCE

Travel sites for the month of January have seen a positive increase in traffic or unique audiences. Apart from Google Maps who is leading the category – Webjet, Priceline Network (not affiliated with Priceline Pharmacy), Booking.com have over performed by a great margin; **34%**, **58%** and **60%** increases in unique audience. Jetstar returned to a normative level following a Christmas peak in traffic and audience.

Brands	Unique Audience (000)		Variance Change	Time Per Person	
	December	January		%	December
Google Maps	4,508	5,359	19%	00:19:11	00:19:42
TripAdvisor	1,695	2,192	29%	00:16:24	00:21:08
Qantas	1,925	2,120	10%	00:25:51	00:23:12
Priceline Network	1,038	1,644	58%	00:15:30	00:17:09
Booking.com	990	1,584	60%	00:15:31	00:17:10
Virgin Travel & Tourism	1,022	1,297	27%	00:15:52	00:16:53
Virgin Australia	999	1,239	24%	00:15:45	00:16:43
Jetstar	1,260	1,228	-3%	00:21:37	00:20:60
Wotif.com	1,065	1,224	15%	00:16:34	00:16:19
Webjet	857	1,149	34%	00:18:59	00:18:57

INCREASED ENGAGEMENT IN TRAVEL

- During December to January – the Travel category has had significant increases in Page Impressions and Time Per Person. There was a **20 percent** increase in Page Impressions and a near **nine minute** increase in Time Per Person.
- These increases in metrics may be due to consumers coming back from their holiday periods and wanting to travel again, or consumers entering the new year with plans to travel in the future.

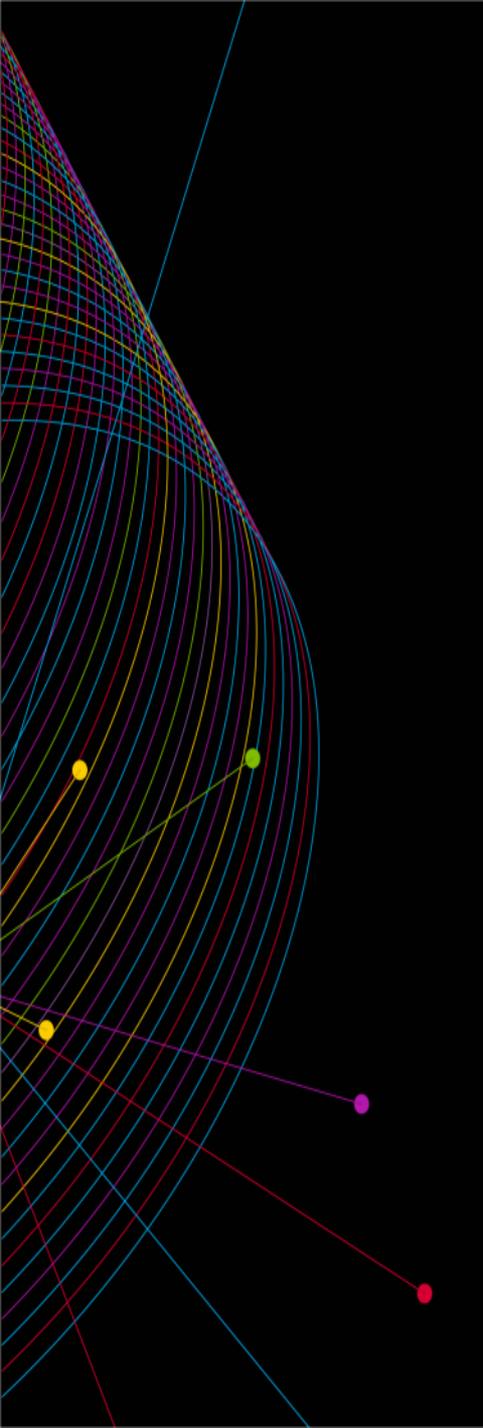


Source: Nielsen Market Intelligence January 2014



Source: Nielsen Online Ratings – Hybrid, January 2014

DEVICE TYPES: ALL

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 points on the sphere.

HIGHLIGHTS: JANUARY 2014

NIELSEN ONLINE RATINGS: HYBRID STREAMING

“

IN THE US, INTERNET ADVERTISING REVENUES FOR Q3 2013, CLIMBED TO A LANDMARK HIGH OF NEARLY \$10.7 BILLION, MARKING A 15 PERCENT YEAR-OVER-YEAR GROWTH.

”

HYBRID STREAMING (VIDEO) KEY ONLINE STATISTICS

January 2014

This month saw an increase in the number of Total streams, following a low point in December of 2013. January also saw an increase in Total Minutes and a increase of 1 Hour and 14mins per active user, a significant increase on the previous month.



1.7 billion streams.



5.2 billion minutes.



7 hours and 29 mins spent per active user.



HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

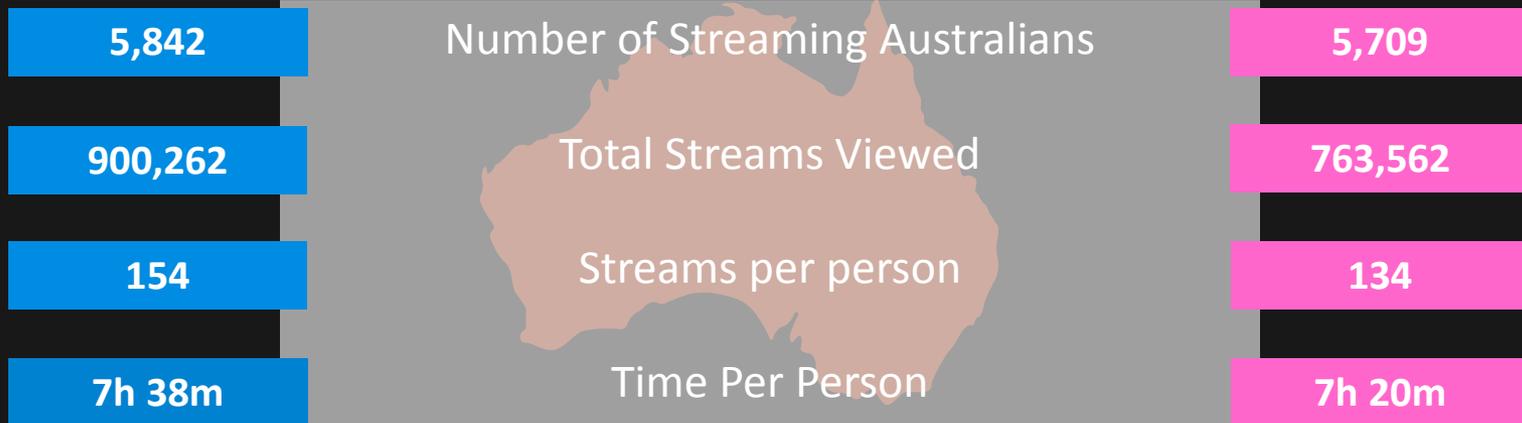
January 2014

While Youtube and Facebook traditionally dominate audience to video streams, it's worth noting that ABC Online Network ranks second in terms of time spent, indicating a highly engaged audience for video content.

UA Rank	Brands	Unique Audience (000s)	Total Streams (000s)	Average Time Spent (HH:MM:SS)
1	YouTube	10,054	1,102,904	05:22:57
2	Facebook	4,087	90,380	00:38:42
3	VEVO	2,359	60,841	01:05:18
4	The CollegeHumor Network	2,215	7,749	00:14:39
5	Mi9	1,891	65,151	00:35:06
6	news.com.au	1,530	14,944	00:09:48
7	Yahoo!7	1,308	6,154	00:16:56
8	ABC Online Network	883	7,092	02:24:50
9	Vube	863	3,739	00:14:38
10	smh.com.au	808	3,525	00:09:43

HYBRID STREAMING: DEMOGRAPHIC BREAKDOWN

January 2014



During the month of January, males produced 18% more streams than females. However, compared to December – there were increases in total streams viewed, streams per person and a near additional 2 hours for time per person.

HYBRID STREAMING: AGE DEMOGRAPHICS

January 2014

2-17

Percentage of Online Aus **5.7%**

Average Streams **154**

Average Time (HH:MM) **8:04**

18-24

Percentage of Online Aus **10.5%**

Average Streams **260**

Average Time (HH:MM) **15:48**

25-34

Percentage of Online Aus **20.4%**

Average Streams **175**

Average Time (HH:MM) **9:45**

35-49

Percentage of Online Aus **28%**

Average Streams **144**

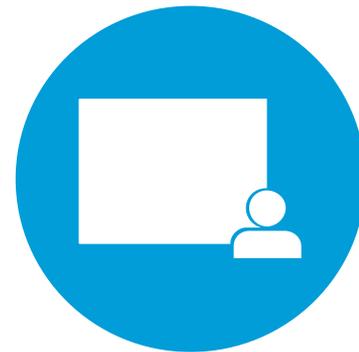
Average Time (HH:MM) **7:12**

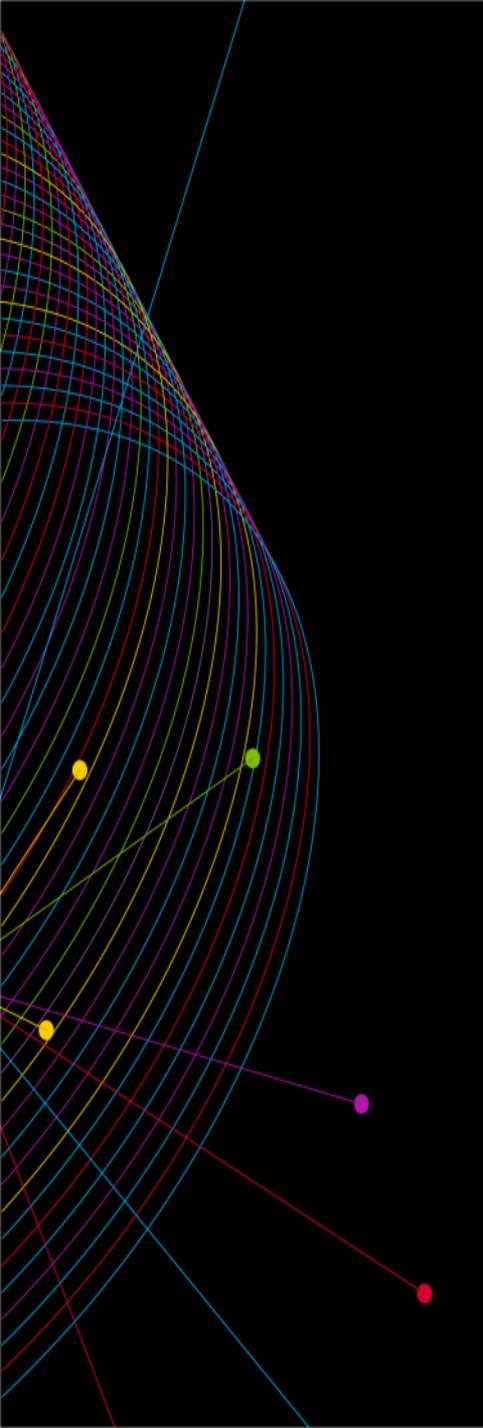
50+

Percentage of Online Aus **35.3%**

Average Streams **91**

Average Time (HH:MM) **3:50**



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 points on the sphere.

MOBILE UPDATE: JANUARY 2014

NIELSEN MARKET INTELLIGENCE

A large, grey, stylized opening quotation mark.

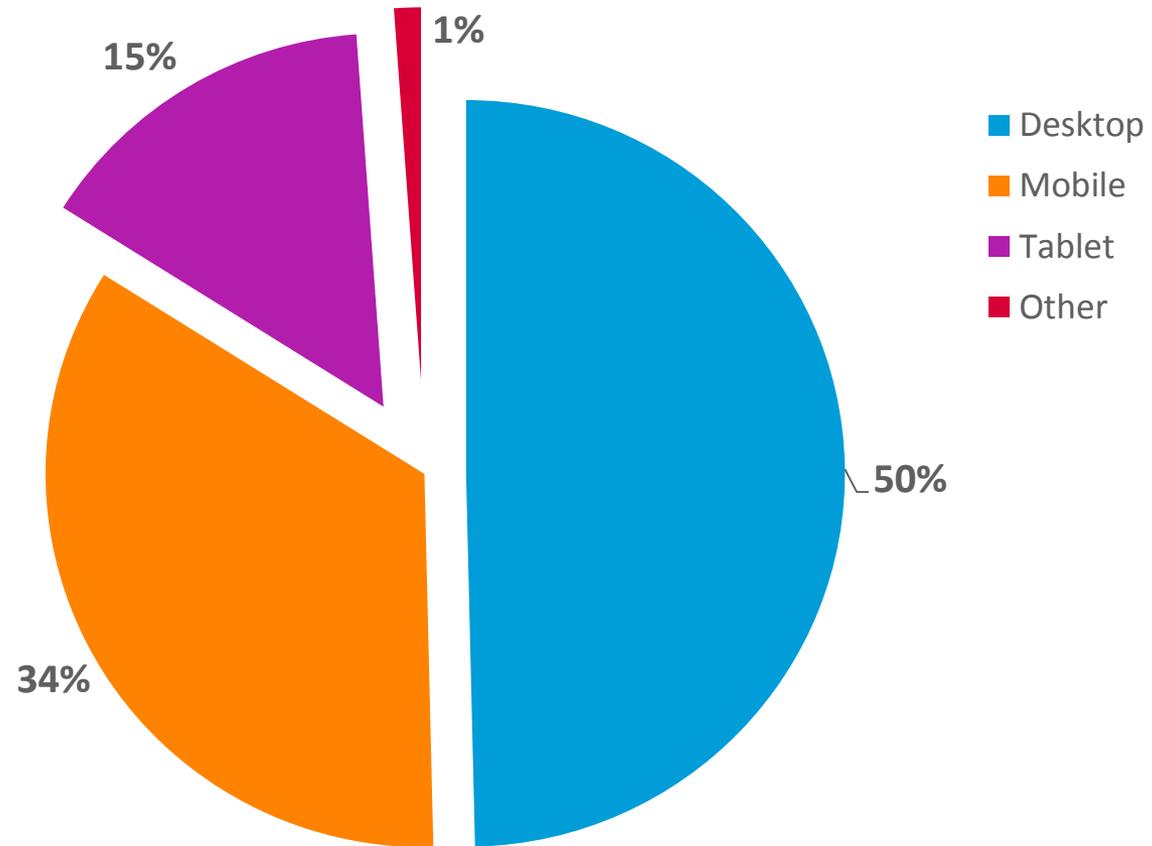
AUSTRALIANS ARE SPENDING ALMOST A DAY PER WEEK ONLINE, AND, MORE THAN A THIRD OF ONLINE AUSTRALIANS OWN CONNECTED DEVICES THAT DIDN'T EXIST 10 YEARS AGO.

A large, grey, stylized closing quotation mark.

DEVICE TYPE COMPARISON

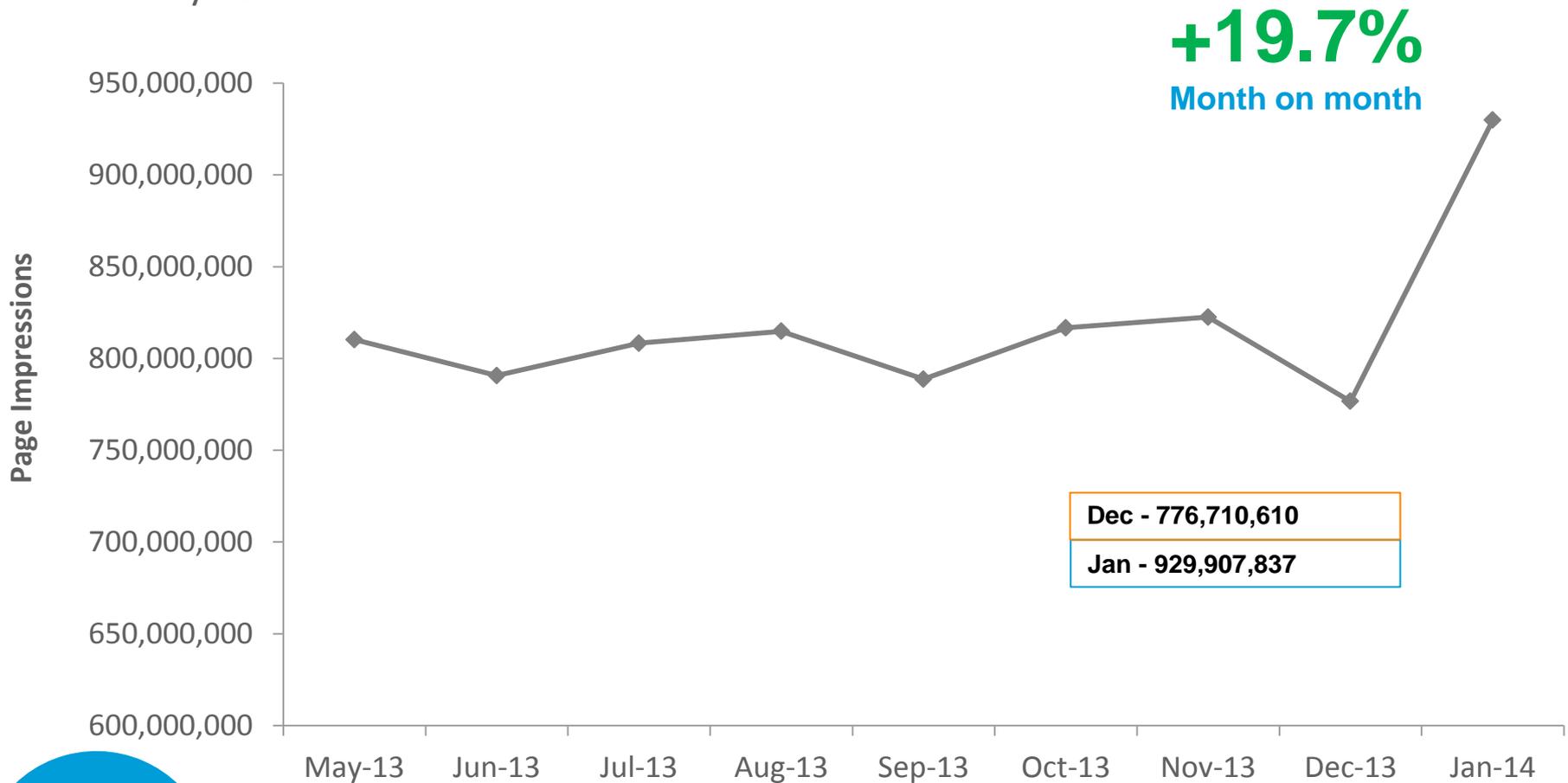
TOTAL AVERAGE DAILY UNIQUE BROWSERS: JANUARY 2014

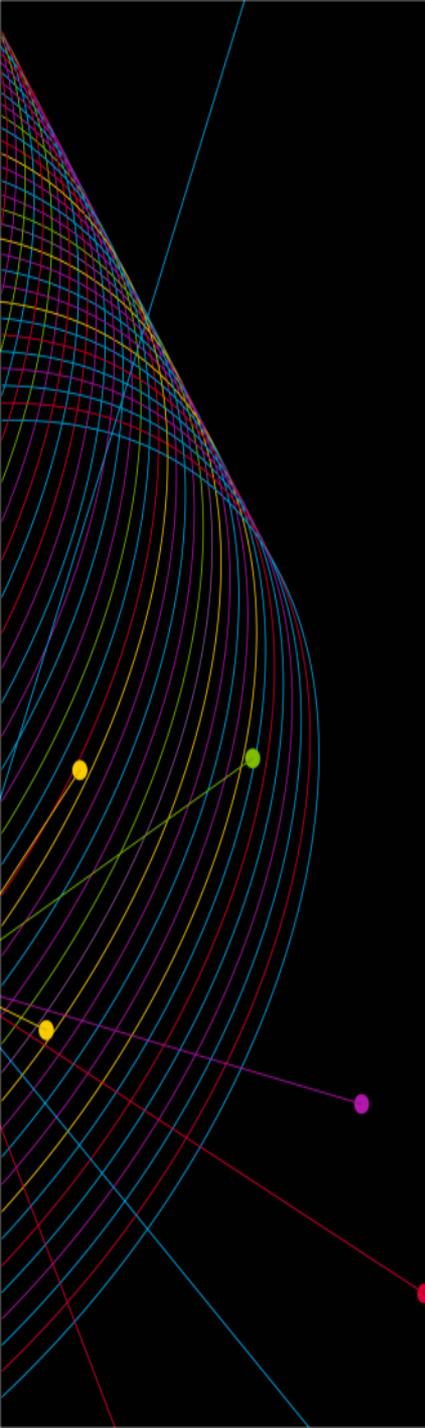
With **50 percent** of all measured daily Unique Browsers coming from mobile devices, this is an all-time high since mobile device measurement began in May 2013.



MOBILE PAGE IMPRESSIONS ALSO AT AN ALL-TIME HIGH

January 2014



An abstract graphic on the left side of the slide features a dense, overlapping pattern of thin, curved lines in various colors (blue, green, yellow, red, purple) that form a large, curved shape resembling a stylized 'n' or a series of concentric arcs. Several lines extend from this shape towards the center of the slide, ending in small colored dots (yellow, green, purple, red) that correspond to the colors of the lines.

HYBRID + MARKET INTELLIGENCE

CATEGORY SPOTLIGHT: EDUCATION AND CAREERS

TOP 10 EDUCATION AND CAREERS CATEGORY SITES

January 2014

UA Rank	Brands	Unique Audience (000's)	Page Views (000s)	Active Reach %	Sessions Per Person	Time Per Person
1	Seek	1,974	152,765	12.58	9.09	01:06:10
2	careerone.com.au	867	11,957	5.52	2.96	00:09:29
3	Indeed	577	11,676	3.68	4.37	00:14:04
4	MyCareer	381	5,198	2.43	3.31	00:13:05
5	Open Universities Australia	341	4,616	2.17	2.01	00:10:04
6	nga.net	323	5,801	2.06	2.63	00:13:07
7	Monash University	295	35,418	1.88	7.70	01:09:21
8	The University of Sydney	286	5,770	1.82	2.88	00:13:29
9	Griffith University	268	57,249	1.71	7.97	02:00:30
10	Jobrapido	236	2,681	1.51	3.89	00:06:39

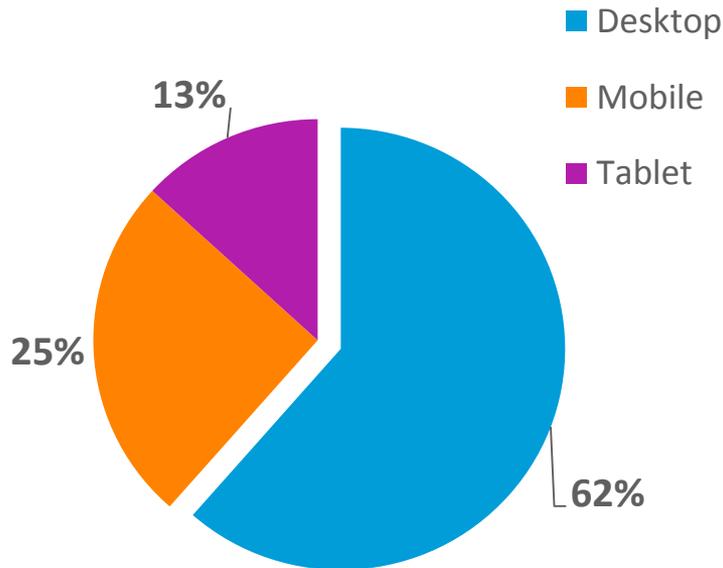
Note: LinkedIn, although notable, is categorised within the 'member communities' sub-category within Nielsen Online Ratings. LinkedIn's Unique Audience for January 2014 was 2,555,000 people.

EDUCATION AND CAREERS BY DEVICE

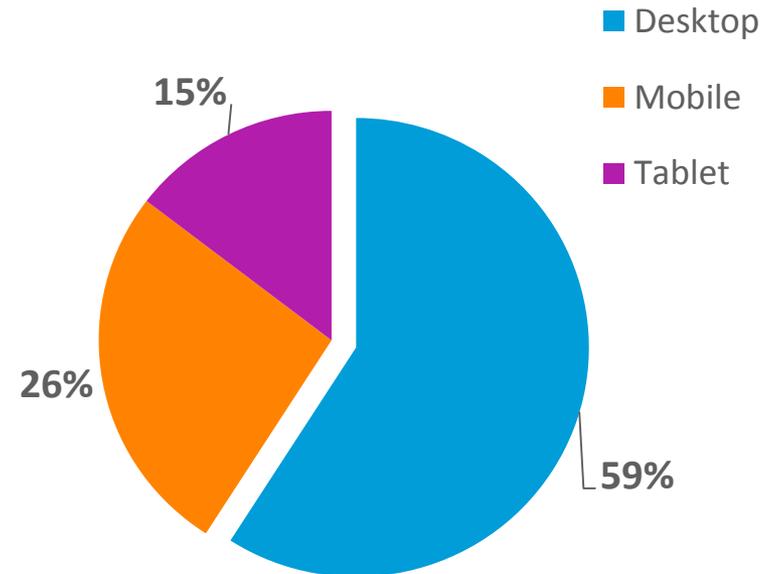
JANUARY 2014

During the December to January period, there was a three percent decline in Unique Browsers for Education and Careers sites coming from Desktops. This decline was replaced by the growth in mobile and tablet devices. The slight shift in traffic could be due to the natural changing consumer preferences in regards to unique browsers i.e. using desktops less while utilising mobiles / tablets more frequently.

December 2013



January 2014

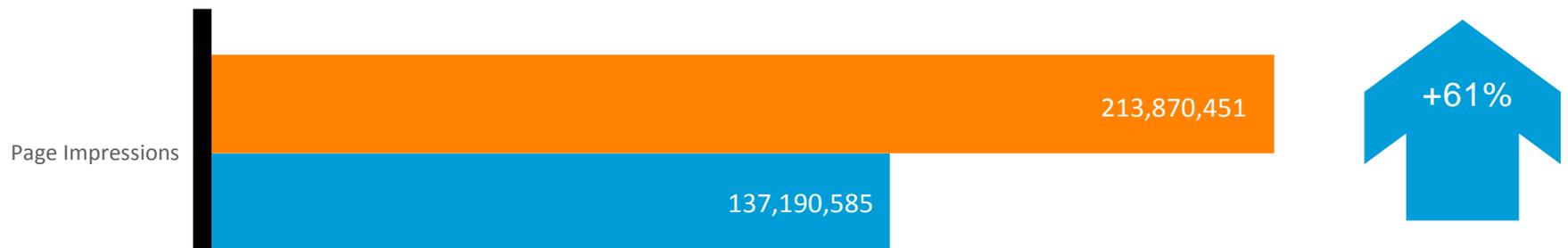


Source: Nielsen Market Intelligence, December 2013 January 2014

INCREASED ENGAGEMENT IN EDUCATION AND CAREERS

JANUARY 2014

- During December to January – the Education and Careers category has had major increases in Page Impressions yet only a slight increase in Time Per Person. There was a **61 percent** increase in Page Impressions and a **20 minute** increase in Time Per Person. Interestingly, showing us viewers were rapidly searching more pages for a slightly longer time period.
- This may be due to consumers entering the new year seeking different opportunities within their working and education environment such as new job prospects, graduation position openings or individuals applying for further educational qualifications.

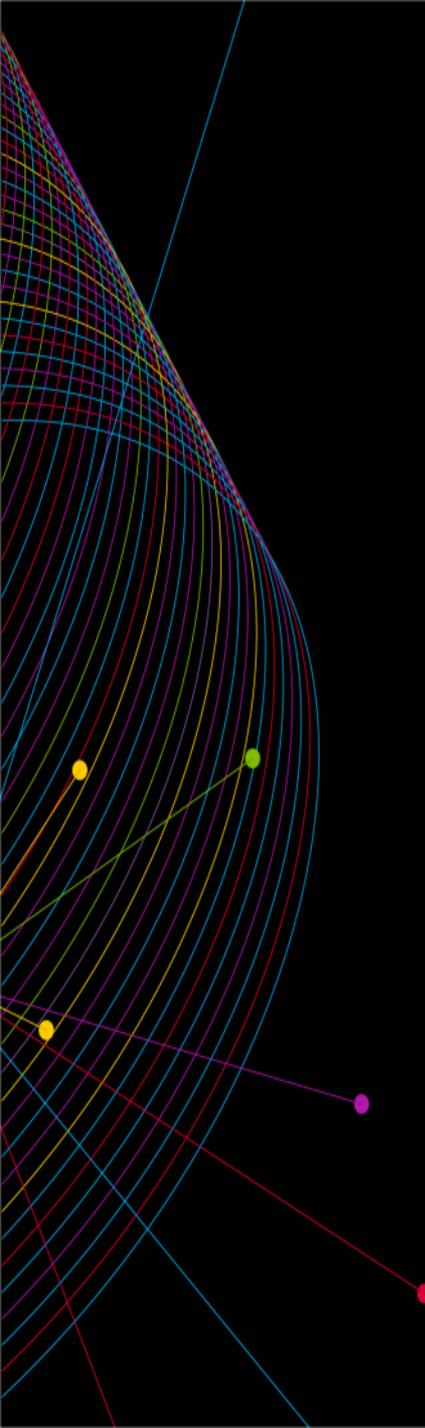


Source: Nielsen Market Intelligence January 2014



Source: Nielsen Online Ratings – Hybrid, January 2014

DEVICE TYPES: ALL

An abstract graphic on the left side of the slide. It features a series of curved, overlapping lines in various colors (red, green, blue, yellow) that form a partial view of a sphere or a complex, curved surface. Several small, colored dots (yellow, green, purple, red) are scattered across the surface, with thin lines extending from them towards the center of the sphere.

MOBILE AUDIENCE MEASUREMENT PILOT

MOBILE AUDIENCE MEASUREMENT PILOT IN 2014

In partnership with selected members of IAB Australia, Nielsen have commenced recruitment for an audience measurement panel of mobile and tablet users. The panel will begin to better inform the industry participants of the nuances of mobile audiences. For further information, contact your Nielsen account manager directly. A brief timeline of activity for the pilot is included on page 29 of this report..

CMO
MARKETING | TECHNOLOGY | LEADERSHIP

Blogs » Online principles

For Australian Open 2014, is changing the game. Put your

The path to mobile audience measurement

Gai Le Roy | 13 December, 2013 09:38 | Comments | Share this post |

A couple of weeks ago the IAB announced an industry research initiative in partnership with Nielsen to monitor mobile media usage by creating a panel of smartphone and tablet users.

The response to this announcement from the industry has been fabulous. It would not surprise anyone that the industry wants more information on consumer's usage of mobile, but what did surprise us was the range of organisations interested in this data and their enthusiasm for the project.

Now I would be a wealthy woman if I had a bitcoin for every time

AdNews GRAMA

TALENT AWARD GREAT AUSTRALIAN TALENT NOW IN A ROLE OUTSIDE AU

home news jobs campaigns rankings opinion blogs directories awards adn

home » news

IAB, Nielsen and publishers build mobile currency panel, set sights on convergence

03 Dec 2013
Brendan Coyne

The IAB, Nielsen and seven major Australian publishers are combining to build a mobile measurement panel. The ultimate aim is to build a

MUMBRELLA
everything under Australia's media, marketing & entertainment umbrella

Meet the **MARKETERS** Hitting the road

News Mumbo Opinion Events Freelance Jobs Directory

OPINION | FEATURES

Inside the Trojan Horse

shaper

Last year DDB launched its problem solving hub Shaper claiming it would be

IAB launch mobile audience measurement pilot

The IAB has launched a pilot program through Nielsen offering better measurement of the online and mobile market.

The announcement:

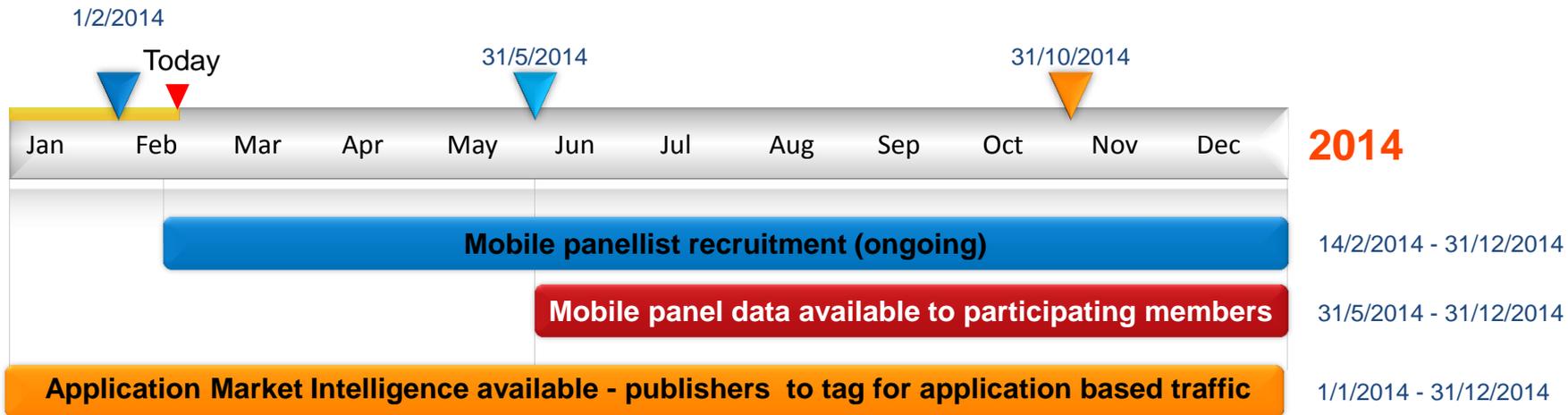
“ IAB Australia has taken another significant step to drive the growth of the online and mobile market, announcing that it has joined forces with seven key publishers to invest in and launch a Mobile Audience Panel Measurement Pilot. The Pilot, which has been jointly funded and will be delivered by Nielsen, will publish its first top line market data

TIMELINE FOR MOBILE PANEL AUDIENCE PILOT

Mobile panel pilot establishment

First Mobile panel data available to IAB Australia participating members

IAB preferred supplier for Audience Measurement announced - commencement January 1 2015

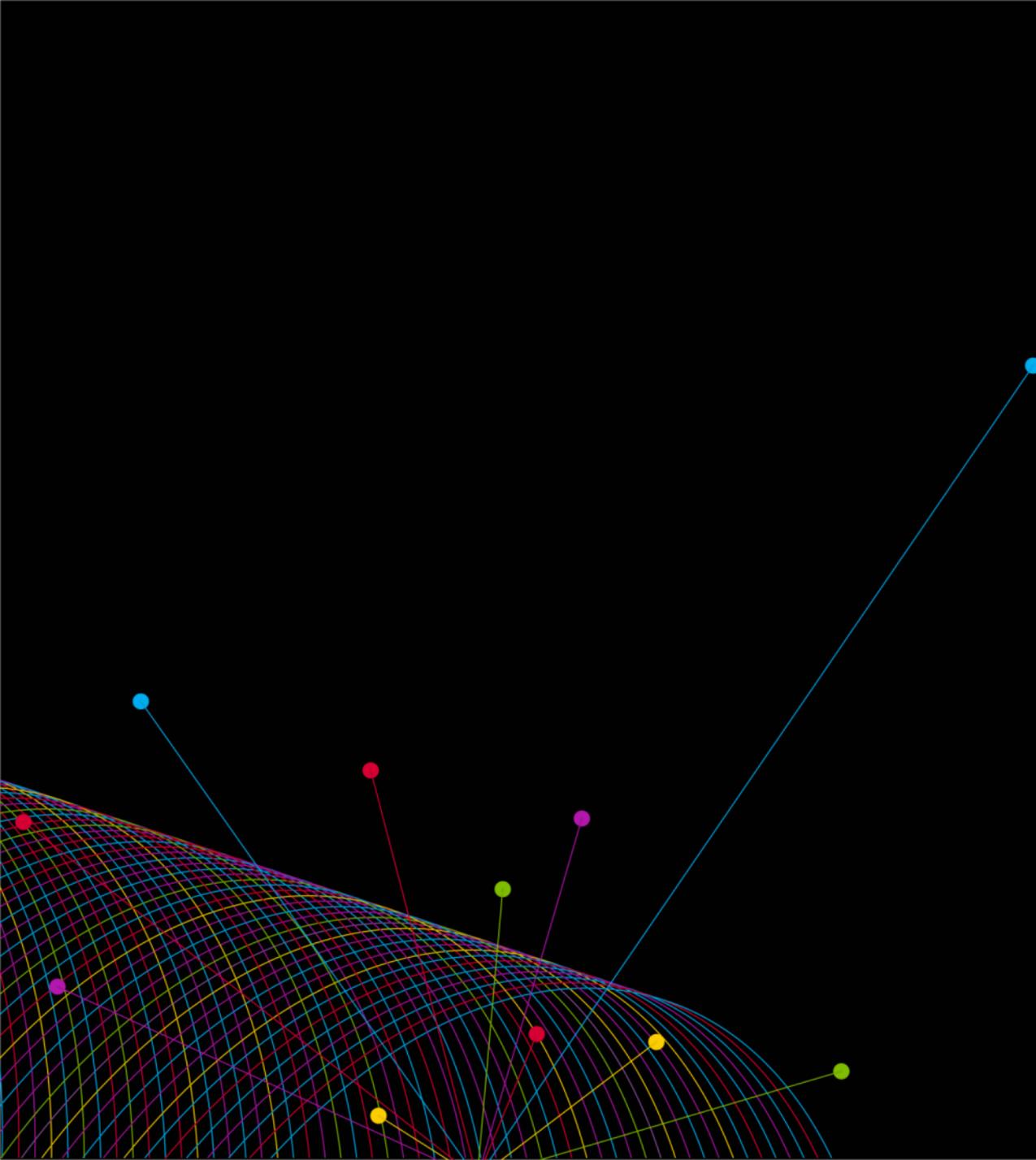


2013 ONLINE ADVERTISING EXPENDITURE

Report to be released Monday 24 February by PWC and IAB Australia



- On Monday February 24, PWC and IAB Australia will release an updated edition of the Online Advertising Expenditure Report, covering the entire Calendar Year for 2013.
- This report by PWC is a valuable asset for all players in digital advertising and is often eagerly anticipated.
- For more information, visit iabastralia.com.au



nielsen
.....

AN UNCOMMON SENSE
OF THE CONSUMER™

**For further
information:**

careau@nielsen.com
www.nielsen.com/au/
(02) 8873 7000