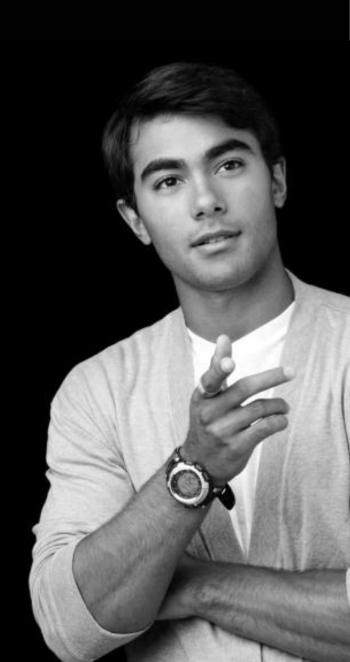# nielsen

THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

NOVEMBER + DECEMBER 2013

STATE OF THE ONLINE LANDSCAPE

November + December 2013

Welcome to the first edition of the Online Landscape Review for 2014. We hope you had an enjoyable holiday break. This edition looks at how Australians engaged with Internet properties for both November and December 2013.

We take a topline view of interaction with major ecommerce sites for the period, as well as within the real estate category .

During **December 2013,** 15.7 million Australians were active online, a reduced number partly due to the Christmas period. On average, Australians spent 36 hours per person online across 60 separate internet sessions.

As can be expected, there was a marked increase in Internet consumption amongst people aged 2 to 17, with time online increasing by more than 12%, or an additional 1 hour and 17 minutes online during the school holiday period. Video consumption for this age group appears to have driven the increase, with an additional 22% time spent watching video streams by this audience – an additional 1 hour and 8 minutes when compared to the month of November.

If you'd like to know more about content within this report, please contact your Nielsen Account Manager or email CareAU@nielsen.com.

OUR DATA: THE NIELSEN PERSPECTIVE
NOVEMBER + DECEMBER 2013

AT A GLANCE: THE ONLINE LANDSCAPE
November + December 2013

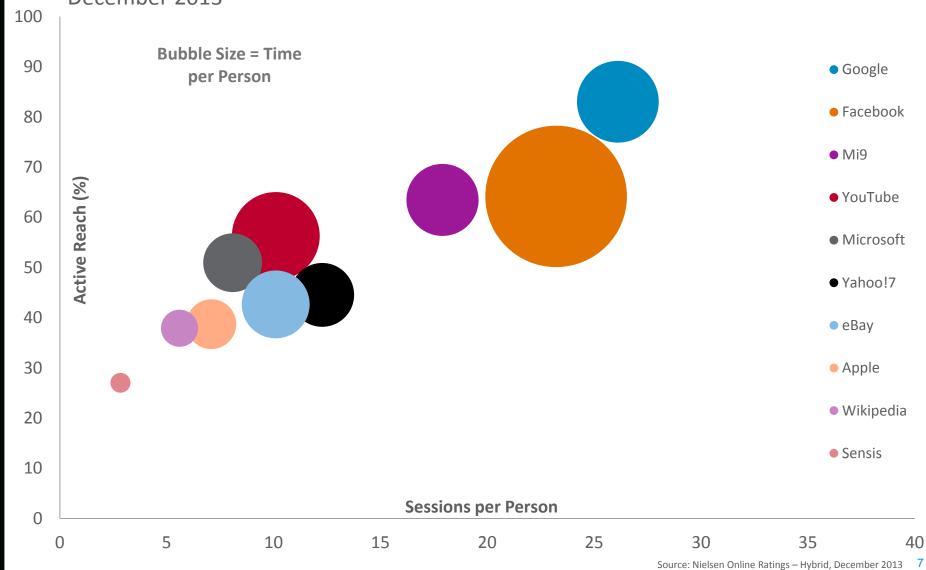| November 2013	December 2013
28.6 billion viewed pages.	**26.8** billion viewed pages.
36.3 billion minutes spent.	**34.2** billion minutes spent.
36 hours spent, across **58** sessions.	**36** hours spent, across **60** sessions.
822.5 million mobile page impressions made.	**776.7** million mobile page impressions made.

Source: Nielsen Online Ratings – Hybrid, November + December 2013; Nielsen Market Intelligence, November + December 2013

TOP 10 BRANDS BY UNIQUE AUDIENCE*

November + December 2013

November 2013				December 2013			
Brands	Unique Audience (000s)	Page Views (000s)	Time Per Person (HH:MM:SS)	Brands	Unique Audience (000s)	Page Views (000s)	Time Per Person (HH:MM:SS)
Google	14,266	3,365,760	02:49:44	Google	13,005	2,716,383	02:34:29
Facebook	11,124	2,921,356	07:20:45	Facebook	10,051	2,301,159	07:43:25
Mi9	10,547	1,135,139	01:56:49	Mi9	9,940	1,014,354	02:00:05
YouTube	9,585	757,511	02:50:34	YouTube	8,816	688,273	02:58:13
Microsoft	8,937	40,734	01:02:43	Microsoft	7,980	42,480	01:19:49
Yahoo!7	7,812	460,548	01:21:30	Yahoo!7	6,977	427,038	01:34:26
eBay	6,961	899,357	01:43:36	eBay	6,681	879,588	01:46:21
Wikipedia	6,928	134,109	00:28:48	Apple	6,066	33,142	00:57:18
Apple	6,616	35,895	00:50:08	Wikipedia	5,935	139,485	00:31:48
Skype	4,249	15,280	01:45:27	Sensis	4,236	30,753	00:09:07

*Including Applications that access the internet

THE ONLINE UNIVERSE:
NOVEMBER + DECEMBER 2013
NIELSEN ONLINE RATINGS: HYBRID

TOP 10 BRANDS AND THEIR ENGAGEMENT

December 2013

Bubble Size = Time per Person

Active Reach (%)

Sessions per Person

Legend:
- Google
- Facebook
- Mi9
- YouTube
- Microsoft
- Yahoo!7
- eBay
- Apple
- Wikipedia
- Sensis

TOP 10 BRANDS AND THEIR ENGAGEMENT

December 2013

Rank	Brands	Active Reach %	Sessions Per Person	Time Per Person
1	Google	83.05	26.11	02:34:29
2	Facebook	64.18	23.22	07:43:25
3	Mi9	63.47	17.90	02:00:05
4	YouTube	56.30	10.10	02:58:13
5	Microsoft	50.96	8.08	01:19:49
6	Yahoo!7	44.55	12.27	01:34:26
7	eBay	42.66	10.10	01:46:21
8	Apple	38.74	7.09	00:57:18
9	Wikipedia	37.90	5.60	00:31:48
10	Sensis	27.05	2.83	00:09:07

AGE DEMOGRAPHICS ONLINE
November + December 2013

2-17

	Nov	Dec
% Online Aus	6.8%	7%
Av Page Views	375	391
Av Time Per Person*	10:20	11:37

18-24

	Nov	Dec
% Online Aus	12.8%	10.5%
Av Page Views	1,684	1,493
Av Time Per Person*	43:45	39:17

25-34

	Nov	Dec
% Online Aus	22.6%	19.2%
Av Page Views	2,050	1,999
Av Time Per Person*	41:24	42:22

35-49

	Nov	Dec
% Online Aus	28.7%	28.7%
Av Page Views	1,932	1,810
Av Time Per Person*	39:28	39:29

50+

	Nov	Dec
% Online Aus	34.1%	34.8%
Av Page Views	1,618	1,609
Av Time Per Person*	33:28	35:21

*HH:MM

NIELSEN ONLINE RATINGS – HYBRID
CATEGORY SPOTLIGHT: REAL ESTATE/APARTMENTS AND ONLINE RETAIL
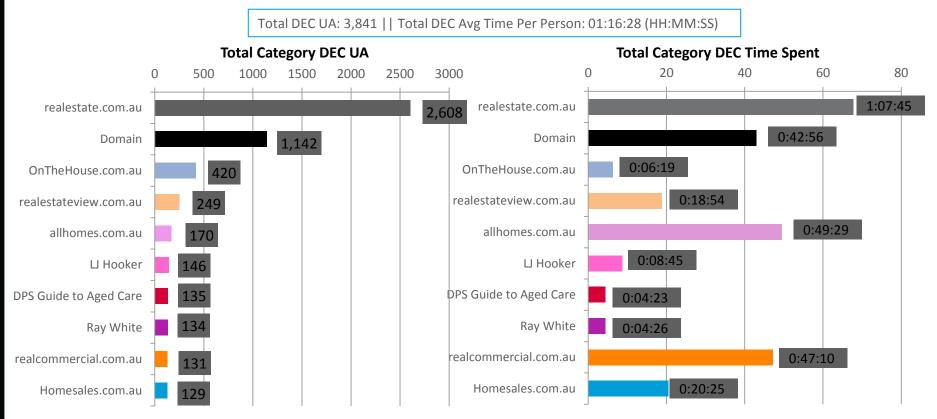
REAL ESTATE/ APARTMENTS

DECEMBER 2013

With the exception of the two major players in the real estate category (Domain and Realestate.com.au), time per person and audience do not correlate.
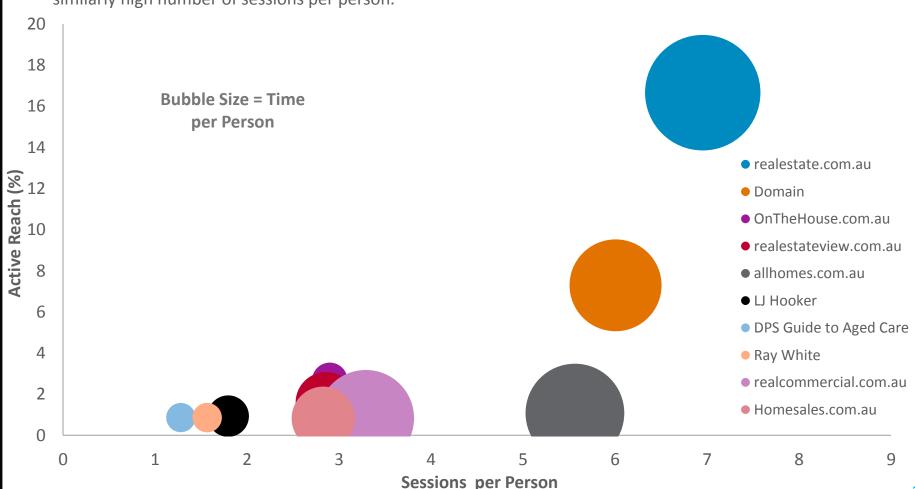
AllHomes.com.au and Realcommercial.com.au, although targeting niche audiences, also garner significant time per person, at 49 minutes and 47 minutes respectively over the month.

Total DEC UA: 3,841 || Total DEC Avg Time Per Person: 01:16:28 (HH:MM:SS)

Total Category DEC UA

Site	UA
realestate.com.au	2,608
Domain	1,142
OnTheHouse.com.au	420
realestateview.com.au	249
allhomes.com.au	170
LJ Hooker	146
DPS Guide to Aged Care	135
Ray White	134
realcommercial.com.au	131
Homesales.com.au	129

Total Category DEC Time Spent

Site	Time
realestate.com.au	1:07:45
Domain	0:42:56
OnTheHouse.com.au	0:06:19
realestateview.com.au	0:18:54
allhomes.com.au	0:49:29
LJ Hooker	0:08:45
DPS Guide to Aged Care	0:04:23
Ray White	0:04:26
realcommercial.com.au	0:47:10
Homesales.com.au	0:20:25

Source: Nielsen Online Ratings – Hybrid, November + December 2013

REAL ESTATE/APARTMENT SITES AND THEIR ENGAGEMENT

December 2013

The below illustrates the top 10 real estate/apartment category sites. Realestate.com.au and Domain continue average more than 6 sessions per person for the month. Allhomes.com.au – a mostly Canberra based site, has a similarly high number of sessions per person.
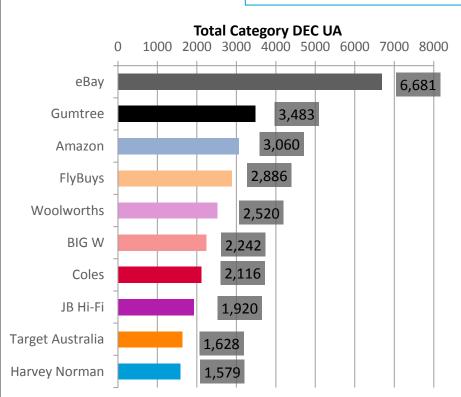
Bubble Size = Time per Person

Legend:
- realestate.com.au
- Domain
- OnTheHouse.com.au
- realestateview.com.au
- allhomes.com.au
- LJ Hooker
- DPS Guide to Aged Care
- Ray White
- realcommercial.com.au
- Homesales.com.au

Y-axis: **Active Reach (%)** (0 to 20)
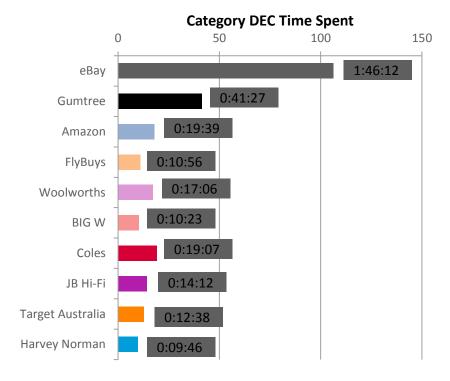
X-axis: **Sessions per Person** (0 to 9)

MULTI-CATEGORY COMMERCE

DECEMBER 2013

With Christmas shopping traditionally peaking in December, consumers spent almost 3 hours in total per person on commerce sites. eBay as usual led the way with 1hour 46 minutes per person during the month, with Gumtree, Coles, Woolworths and Amazon all receiving 17 minutes or more per person from unique audiences of greater than 2 million people.

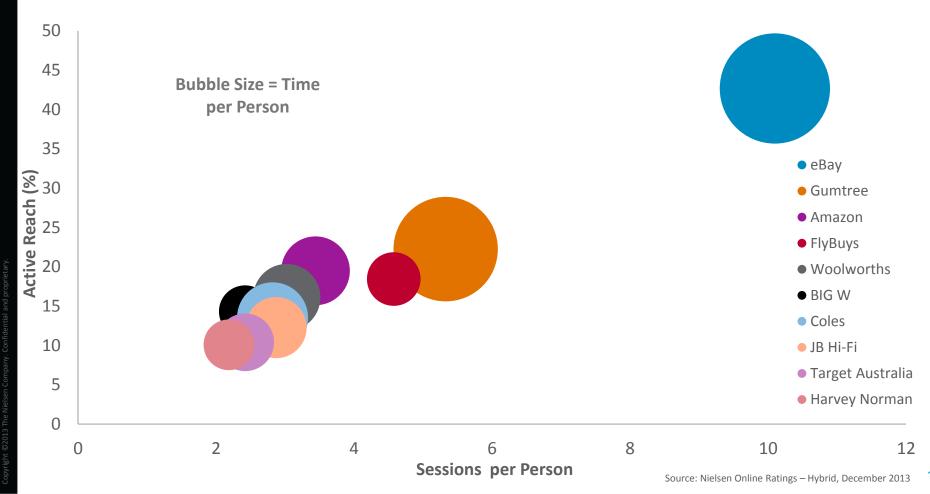Total DEC UA: 11,166 ||Total DEC Time Per Person: 02:55:36 (HH:MM:SS)

Total Category DEC UA

eBay	6,681
Gumtree	3,483
Amazon	3,060
FlyBuys	2,886
Woolworths	2,520
BIG W	2,242
Coles	2,116
JB Hi-Fi	1,920
Target Australia	1,628
Harvey Norman	1,579

Category DEC Time Spent

eBay	1:46:12
Gumtree	0:41:27
Amazon	0:19:39
FlyBuys	0:10:56
Woolworths	0:17:06
BIG W	0:10:23
Coles	0:19:07
JB Hi-Fi	0:14:12
Target Australia	0:12:38
Harvey Norman	0:09:46

Source: Nielsen Online Ratings – Hybrid, November + December 2013

MULTI-CATEGORY COMMERCE SITES AND THEIR ENGAGEMENT
December 2013

Multi-category Commerce sites saw a greater engagement per site in the month of December as compared to November, likely due to the Christmas season. eBay continued to stand out in terms of sessions per person and total audience reach.

Bubble Size = Time per Person

Legend:
- eBay
- Gumtree
- Amazon
- FlyBuys
- Woolworths
- BIG W
- Coles
- JB Hi-Fi
- Target Australia
- Harvey Norman

X-axis: Sessions per Person (0 – 12)
Y-axis: Active Reach (%) (0 – 50)

TOP 10 MULTI-CATEGORY COMMERCE BRANDS AND THEIR ENGAGEMENT

December 2013
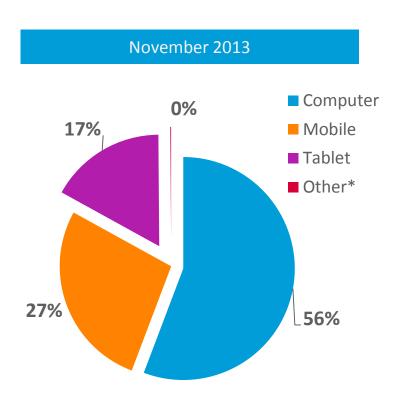
Rank by UA	UA	Sites	Active Reach %	Sessions Per Person	Time Per Person
1	6,681	eBay	42.66	10.10	01:46:12
2	3,483	Gumtree	22.24	5.33	00:41:27
3	3,060	Amazon	19.49	3.44	00:17:57
4	2,886	FlyBuys	18.43	4.58	00:10:56
5	2,520	Woolworths	16.09	3.03	00:17:06
6	2,242	BIG W	14.32	2.42	00:10:23
7	2,116	Coles	13.51	2.82	00:19:07
8	1,920	JB Hi-Fi	12.26	2.87	00:14:12
9	1,628	Target Australia	10.39	2.42	00:12:38
10	1,579	Harvey Norman	10.08	2.19	00:09:46
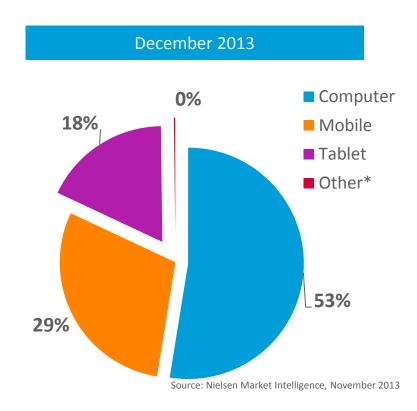
MULTI-CATEGORY COMMERCE BY DEVICE
November + December 2013

During the November/December period Multi-Category Commerce sites experienced a 3% drop in daily unique browsers from PCs and laptops, replaced by growth in mobile and tablet access. With Christmas shopping underway during December, traffic shift to tablet devices was contrary to public expectations of significant tablet traffic growth during Christmas shopping.

November 2013

■ Computer	
■ Mobile	
■ Tablet	
■ Other*	

- 0%
- 17%
- 27%
- 56%

December 2013

■ Computer	
■ Mobile	
■ Tablet	
■ Other*	

- 0%
- 18%
- 29%
- 53%

Source: Nielsen Market Intelligence, November 2013

TOP 10 TRADITIONAL "BRICKS AND MORTAR" ONLINE RETAIL SITE

Bricks and Mortar retailers have increased their share of time spent in online retail stores and this has resulted in an uplift in traffic. Many traditional retailers are benefitting from this shift into the online space as consumers are becoming more engaged throughout the purchasing process. Myer had a noticeable increase in time per person over the November to December period, despite issues with site stability during the period.

Brands	Unique Audience (000s)			Time Per Person (HH:MM:SS)		
	November	December	Actual Variance	November	December	Actual Variance
Woolworths	2,381	2,520	139	0:17:05	0:17:06	0:00:01
BIG W	1,903	2,242	339	0:09:36	0:10:23	0:00:47
JB Hi-Fi	1,790	2,116	326	0:11:04	0:19:07	0:08:03
Coles	1,708	1,920	212	0:17:36	0:14:12	-0:03:24
Target Australia	1,494	1,628	134	0:12:58	0:12:38	-0:00:20
Harvey Norman	1,389	1,579	190	0:06:54	0:09:46	0:02:52
Woolworths HomeShop	1,224	1,473	249	0:22:03	0:20:39	-0:01:24
Officeworks	1,215	1,280	65	0:10:31	0:07:00	-0:03:31
Myer	1,098	1,183	85	0:09:53	0:14:28	0:04:35
Kmart Australia	1,039	1,182	143	0:06:44	0:10:32	0:03:48

HYBRID STREAMING KEY ONLINE STATISTICS

November + December 2013

November 2013	December 2013
12.6 million Unique Australians.	**11.6** million Unique Australians.
1.7 billion streams.	**1.4** billion streams.
4.7 billion minutes.	**4.6** billion minutes.
6 hours and **15** mins spent per active user.	**6** hours and **15** mins spent per active user.

HYBRID STREAMING: TOP 10 BRANDS BY UNIQUE AUDIENCE

November + December 2013

November 2013				December 2013			
Brands	Unique Audience (000s)	Total Streams (000s)	Average Time Spent (HH:MM:SS)	Brands	Unique Audience (000s)	Total Streams (000s)	Average Time Spent (HH:MM:SS)
YouTube	10,873	982,915	03:53:26	YouTube	10,107	906,312	04:21:29
Google	5,541	186,857	01:55:08	Facebook	3,629	56,405	00:24:33
Facebook	3,917	66,996	00:25:01	VEVO	2,357	57,788	01:00:29
VEVO	2,665	63,214	00:56:03	Mi9	2,053	60,214	00:31:18
Mi9	2,064	57,641	00:28:27	The CollegeHumor Network	1,662	5,358	00:11:35
The CollegeHumor Network	2,063	5,472	00:08:52	news.com.au	1,370	10,938	00:08:10
news.com.au	1,461	10,819	00:07:17	Yahoo!7	1,150	5,100	00:16:14
Yahoo!7	1,390	7,346	00:22:11	Vube	987	2,820	00:12:11
ABC Online Network	1,335	13,002	01:48:03	ABC Online Network	926	10,071	01:57:01
smh.com.au	1,075	4,640	00:06:42	smh.com.au	803	3,531	00:05:55

Source: Nielsen Online Ratings – Hybrid Streaming, November + December 2013

HYBRID STREAMING: DEMOGRAPHIC BREAKDOWN

November + December 2013
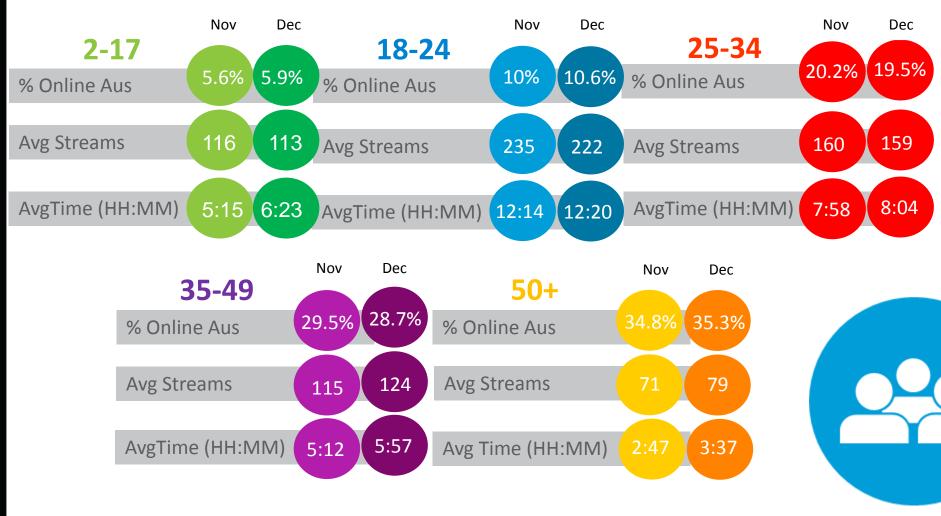
Nov	Dec		Nov	Dec
6,441	5,897	Number of Streaming Australians	6,117	5,729
858,527	811,435	Total Streams Viewed	660,745	636,232
133	138	Streams per person	108	111
5h 58m	6h 51m	Time Per Person	5h 17m	5h 37m

Overall there was a drop in Streaming Australians across both genders, more significantly Males. Interestingly there was a boost in the number of Streams per Person slightly, as well as an increase in Time Per Person spent streaming, highlighting more recreational engagement with online video content over the holiday period.

HYBRID STREAMING: AGE DEMOGRAPHICS
November + December 2013
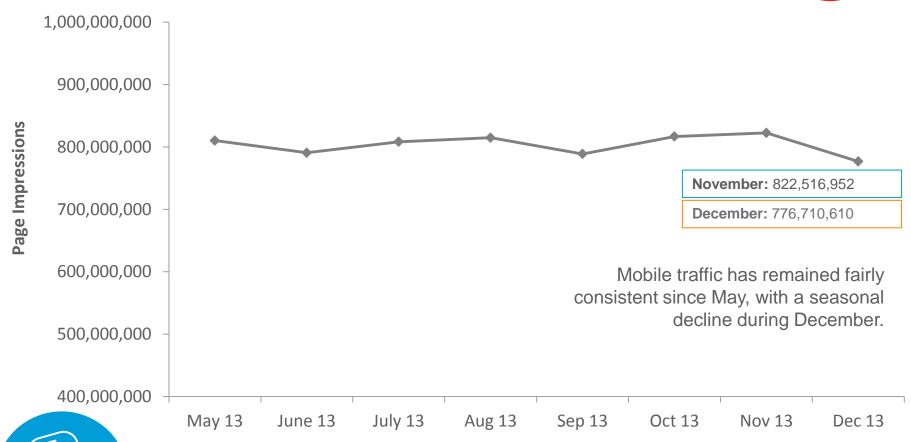
2-17

	Nov	Dec
% Online Aus	5.6%	5.9%
Avg Streams	116	113
AvgTime (HH:MM)	5:15	6:23

18-24

	Nov	Dec
% Online Aus	10%	10.6%
Avg Streams	235	222
AvgTime (HH:MM)	12:14	12:20

25-34

	Nov	Dec
% Online Aus	20.2%	19.5%
Avg Streams	160	159
AvgTime (HH:MM)	7:58	8:04

35-49

	Nov	Dec
% Online Aus	29.5%	28.7%
Avg Streams	115	124
AvgTime (HH:MM)	5:12	5:57

50+

	Nov	Dec
% Online Aus	34.8%	35.3%
Avg Streams	71	79
Avg Time (HH:MM)	2:47	3:37

MOBILE PAGE IMPRESSIONS

November + December 2013

November: 822,516,952

December: 776,710,610

Mobile traffic has remained fairly consistent since May, with a seasonal decline during December.

Page Impressions

1,000,000,000

900,000,000

800,000,000

700,000,000

600,000,000

500,000,000

400,000,000

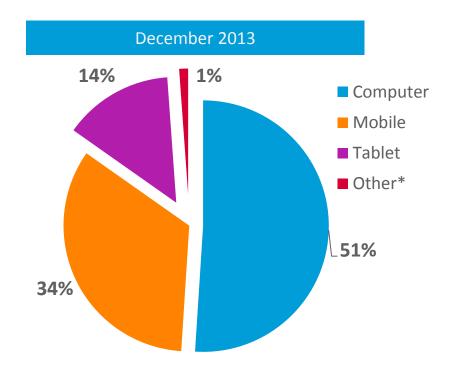May 13   June 13   July 13   Aug 13   Sep 13   Oct 13   Nov 13   Dec 13

DEVICE TYPE COMPARISON
TOTAL AVERAGE DAILY UNIQUE BROWSERS

December 2013

Unlike previous months, there were minor variations in internet consumption from Mobile devices between November and December. The December data is shown below, with 48% of all Daily unique browsers coming from mobile and/or tablet devices during the month.

December 2013

- 14%
- 1%
- 51%
- 34%

Legend:
- Computer
- Mobile
- Tablet
- Other*

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

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