



nielsen

THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

FEBRUARY 2015

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STATE OF THE ONLINE LANDSCAPE

February 2015

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

The online landscape in February saw Australians spend 34 hours online over 60 sessions; with 36 billion minutes spent online and 27 billion pages viewed. Compared to January, the shorter month saw the average consumer spending 2.5 less hours browsing and 1 less session online.

In this month's edition we investigate the following categories:

- Education and Careers with a specific focus on **educational resources** and **universities**.

Also, please note the updates for this month:

- Nielsen Twitter TV Ratings
- Nielsen Mobile Ratings

If you'd like to know more about any of the insights 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 curved, overlapping lines in various colors (red, yellow, green, blue, purple) that form a spherical shape. Several colored dots (yellow, pink, red) are placed on these lines, with thin lines extending from them towards the center of the sphere.

HIGHLIGHTS

NIELSEN ONLINE RATINGS: HYBRID

AT A GLANCE: THE ONLINE LANDSCAPE

February 2015



27 billion viewed pages.



36 billion minutes spent.



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



17,790,000 people were actively surfing online.



Indicates growth or decline based on the previous month

TOP 10 BRANDS AND THEIR ENGAGEMENT

February 2015

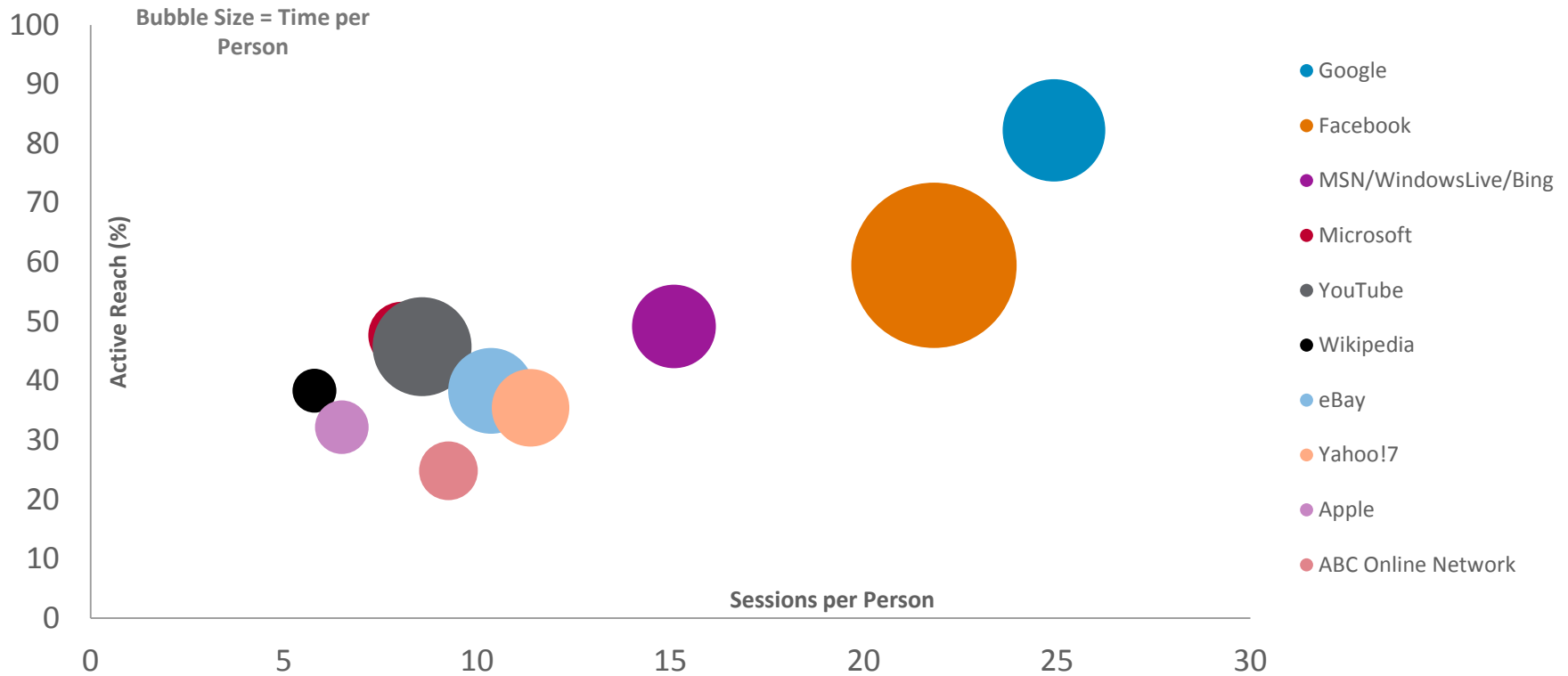
Unique Audience Rank	Brands	Unique Audience (000s)	Page Views (000s)	Active Reach (%)	Sessions Per Person	Time Per Person (hh:mm:ss)
1	Google	14,629	3,191,707	82.23	24.92	02:47:35
2	Facebook	10,581	1,813,067	59.48	21.81	07:17:22
3	MSN/WindowsLive/Bing	8,746	809,032	49.17	15.08	01:51:53
4	Microsoft	8,483	46,561	47.69	8.05	01:11:48
5	YouTube	8,138	483,146	45.75	8.57	02:36:28
6	Wikipedia	6,818	149,705	38.33	5.79	00:30:41
7	eBay	6,816	875,226	38.32	10.35	01:57:35
8	Yahoo!7	6,305	380,912	35.44	11.38	01:35:54
9	Apple	5,724	21,536	32.18	6.50	00:46:01
10	ABC Online Network	4,418	139,505	24.83	9.25	00:55:17

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, February 2015

TOP 10 BRANDS AND THEIR ENGAGEMENT

February 2015



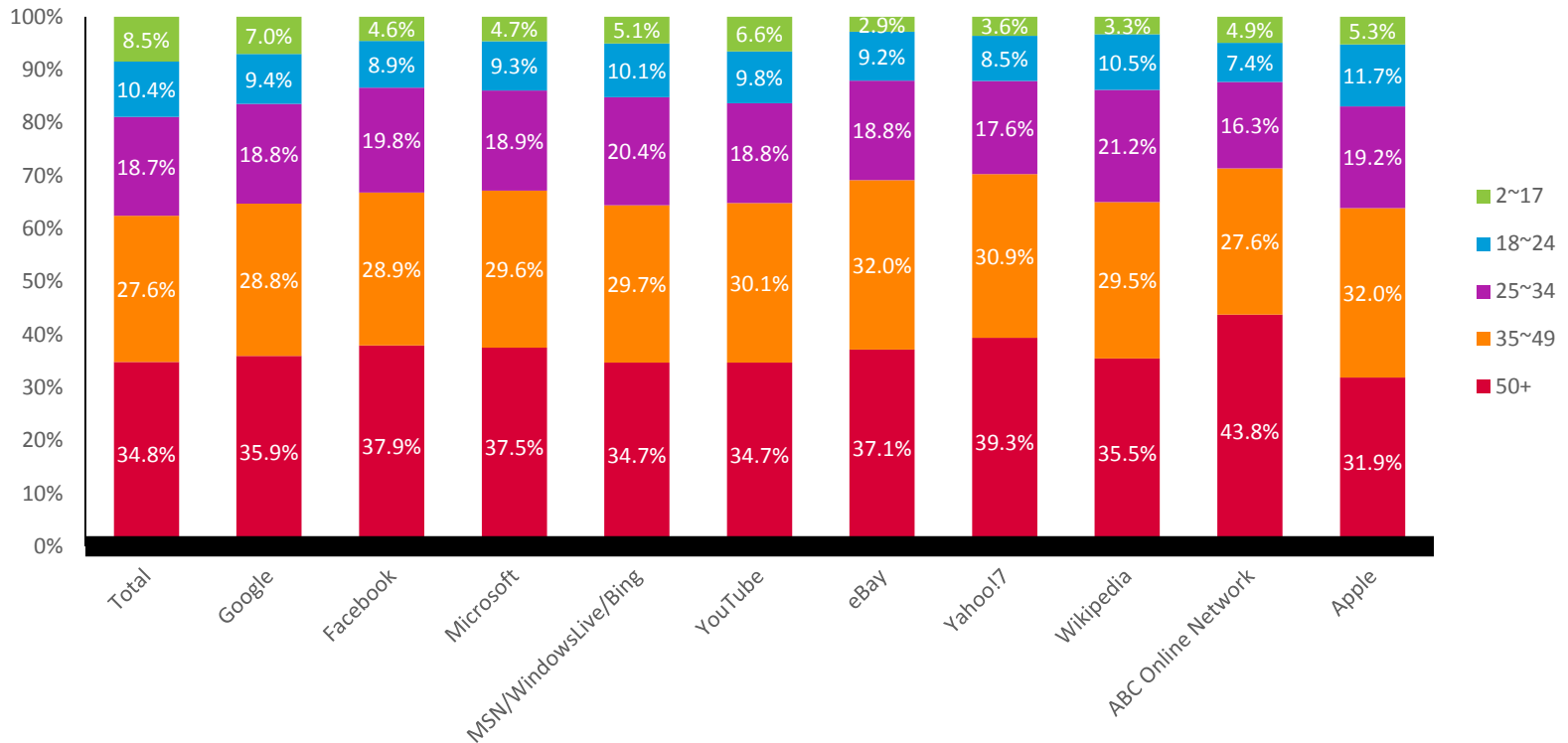
7 out of the top 10 sites reported increases in engagement this month in comparison to January.

eBay experienced the highest increase in sessions per person at 3.7%. This was followed by Microsoft at 3.5% and MSN/WindowsLive/Bing at 3.4%.

Notably, Australians spent 20.7% more time per person browsing Yahoo!7. In addition, ABC Online Network inched into 10th place over PayPal with an 8.2% boost in active reach.

TOP 10 BRANDS BY AGE DEMOGRAPHICS ONLINE

Unique Audience: February 2015

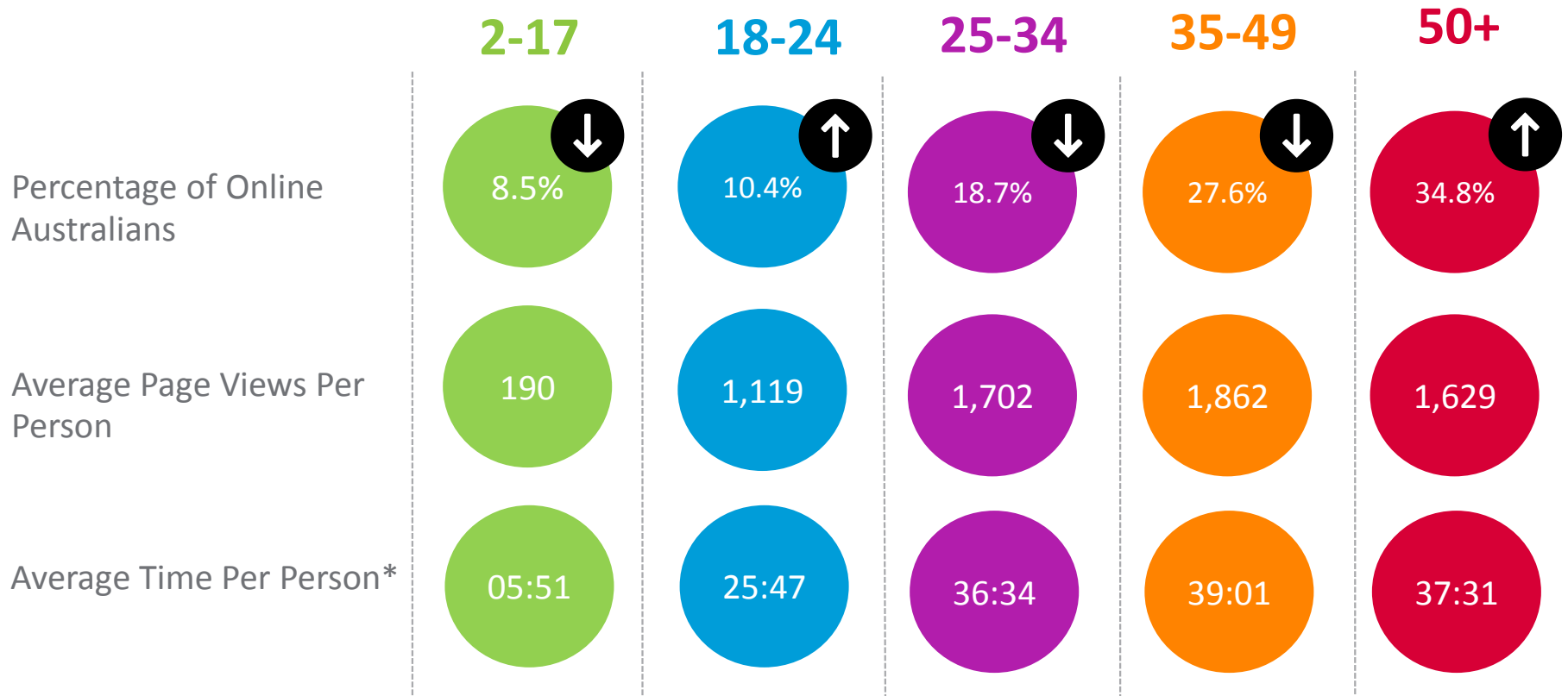


Examining the top 10 sites by their age demographic splits reveals that while Google has the highest proportion of Australians aged 2-17 and has the most even distribution across all ages, sites such as Wikipedia and Apple have a higher skew towards the middle age groups 18-24, 25-34 and 35-49. Notably, Wikipedia has the highest proportion of 25-34 year olds out of the top 10 brands.

Interestingly, eBay and Apple have the highest proportions of 35-49 year olds while audience figures for the ABC Online Network are heavily skewed towards those aged 50+.

HYBRID SURFING: AGE DEMOGRAPHICS ONLINE

The 18 million active online audience in Australia during February 2015 can be broken down as follows:



Out of all the age groups, those aged between 18-24 and those aged 50+ experienced an increase in percentage of online Australians. Those aged between 2 and 17 years old experienced significant decreases in average page views per person and average time per person. This can be attributed to students returning to school, restricting leisure browsing on the internet.

↑ ↓ Indicates growth or decline based on the previous month

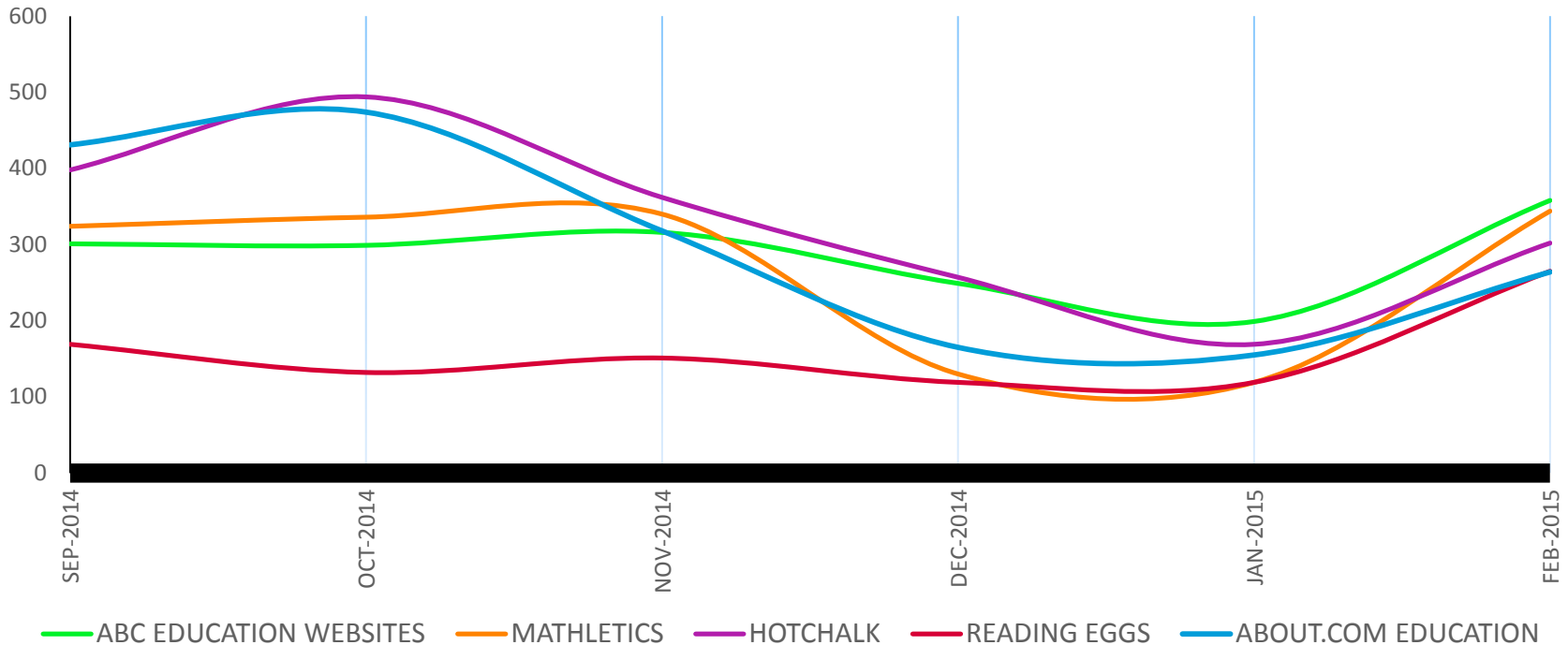
*HH:MM

An abstract graphic on the left side of the slide. It features a series of curved, overlapping lines in various colors (red, yellow, green, blue, purple) that form a spherical or hemispherical shape. Several colored dots (yellow, pink, red) are placed on these lines, with thin lines extending from them towards the right, suggesting a data visualization or a network structure.

CATEGORY SPOTLIGHT: EDUCATION AND CAREERS

TOP 5 EDUCATIONAL RESOURCES SITES

Unique Audience: Sep 2014 - Feb 2015

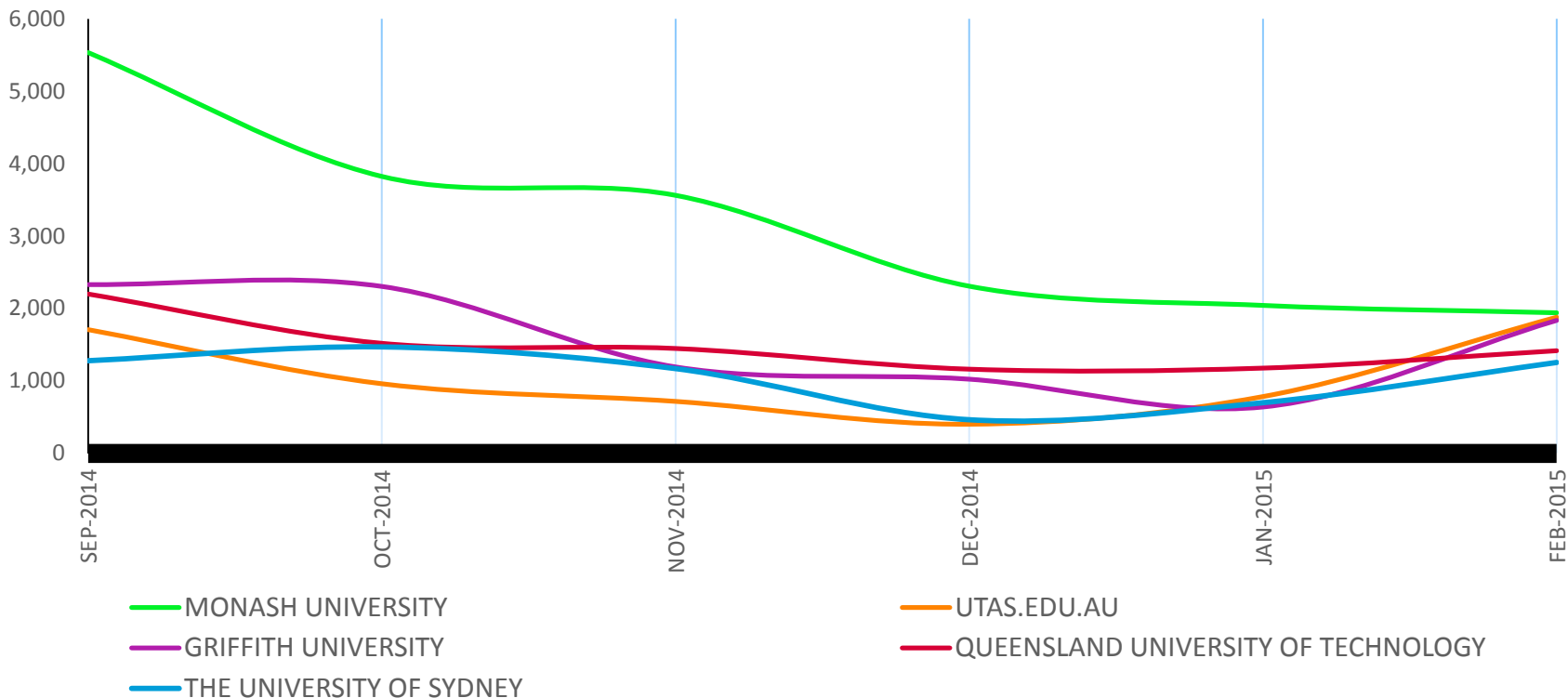


The above figure demonstrates the correlation between commencement of school term and increase in Australians browsing educational resources sites.

Rebounding from the holiday period, sites in the Educational Resources category experienced a collective spike. This is exemplified by the top 5 educational resource sites for this month. Prominent growth spurts include Mathletics with an increase in Unique Audience of 189% and Reading Eggs with an increase of 123% compared to last month.

TOP 5 UNIVERSITY SITES BY ENGAGEMENT

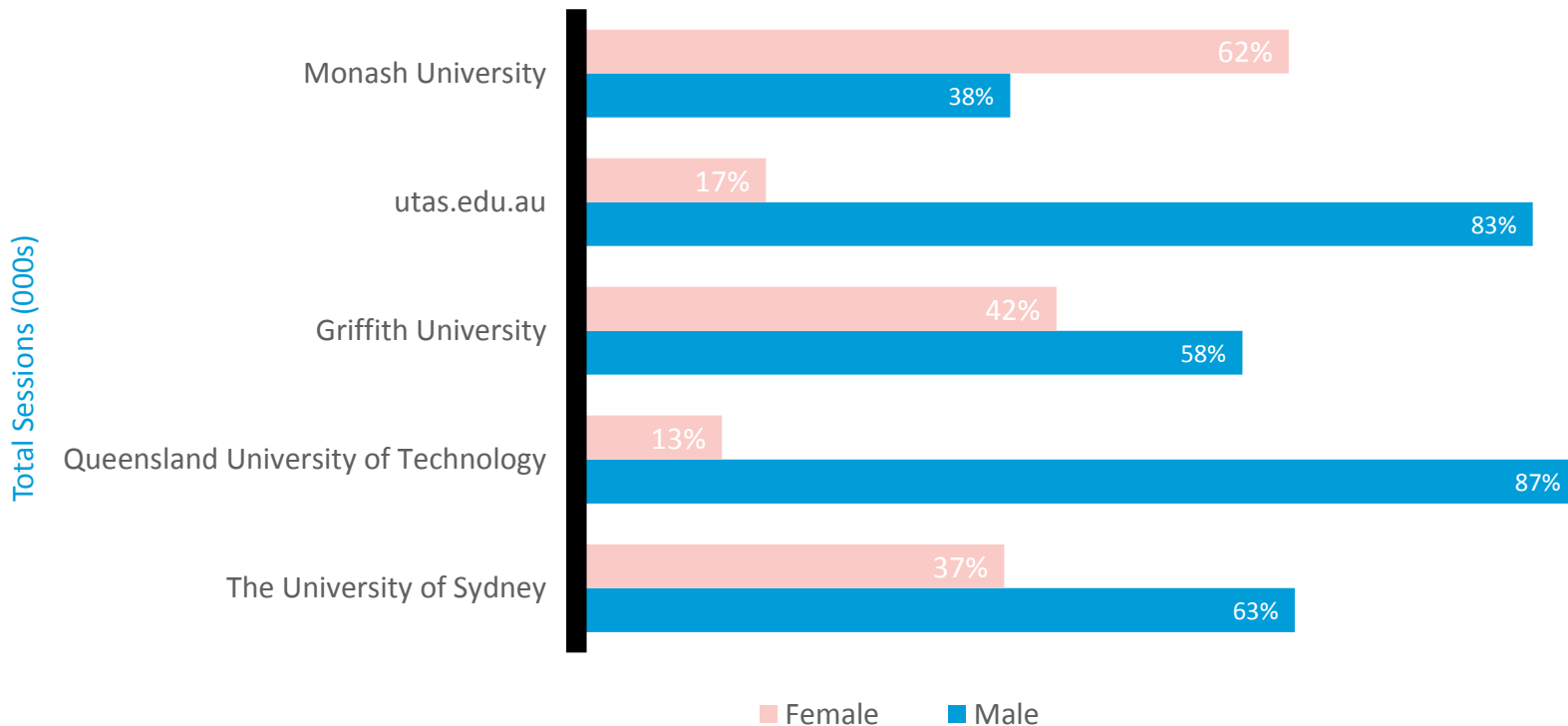
Total Sessions: Sep 2014 - Feb 2015



From the above figure, there was an inflexion point experienced by all 5 sites between October and November, indicating examination period. Following the slump during the holidays, 4 out of the 5 sites experienced a sharp increase as students started returning to university.

Apart from the Monash University site, Griffith University experienced the highest boost in total sessions with a 187% increase since January, followed by utas.edu.au with a 140% increase.

TOP 5 UNIVERSITY SITES BY GENDER



The above figure illustrates engagement for the top 5 university sites ranked by total sessions, split by gender. This month, 4 out of the 5 sites experienced higher engagement from Australian males compared to females. Notably, Queensland University of Technology reported the heaviest skew towards males with male engagement eclipsing female engagement by 74%. This was followed by utas.edu.au with a 66% margin. It is worth noting that Queensland University of Technology and utas.edu.au have popular online courses.

Of the top 5, Monash is the only university with a higher skew towards females, with female engagement overtaking male engagement by a margin of 24%.

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, yellow, green, blue, purple). Several colored dots (yellow, pink, 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.

HIGHLIGHTS

NIELSEN ONLINE RATINGS: HYBRID STREAMING

HYBRID STREAMING KEY ONLINE STATISTICS

February 2015



2.9 billion streams watched.



4.9 billion minutes streamed.



6 hours and 20 minutes spent streaming per person.



12,989,000 people were actively streaming online.



Indicates growth or decline based on the previous month

HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

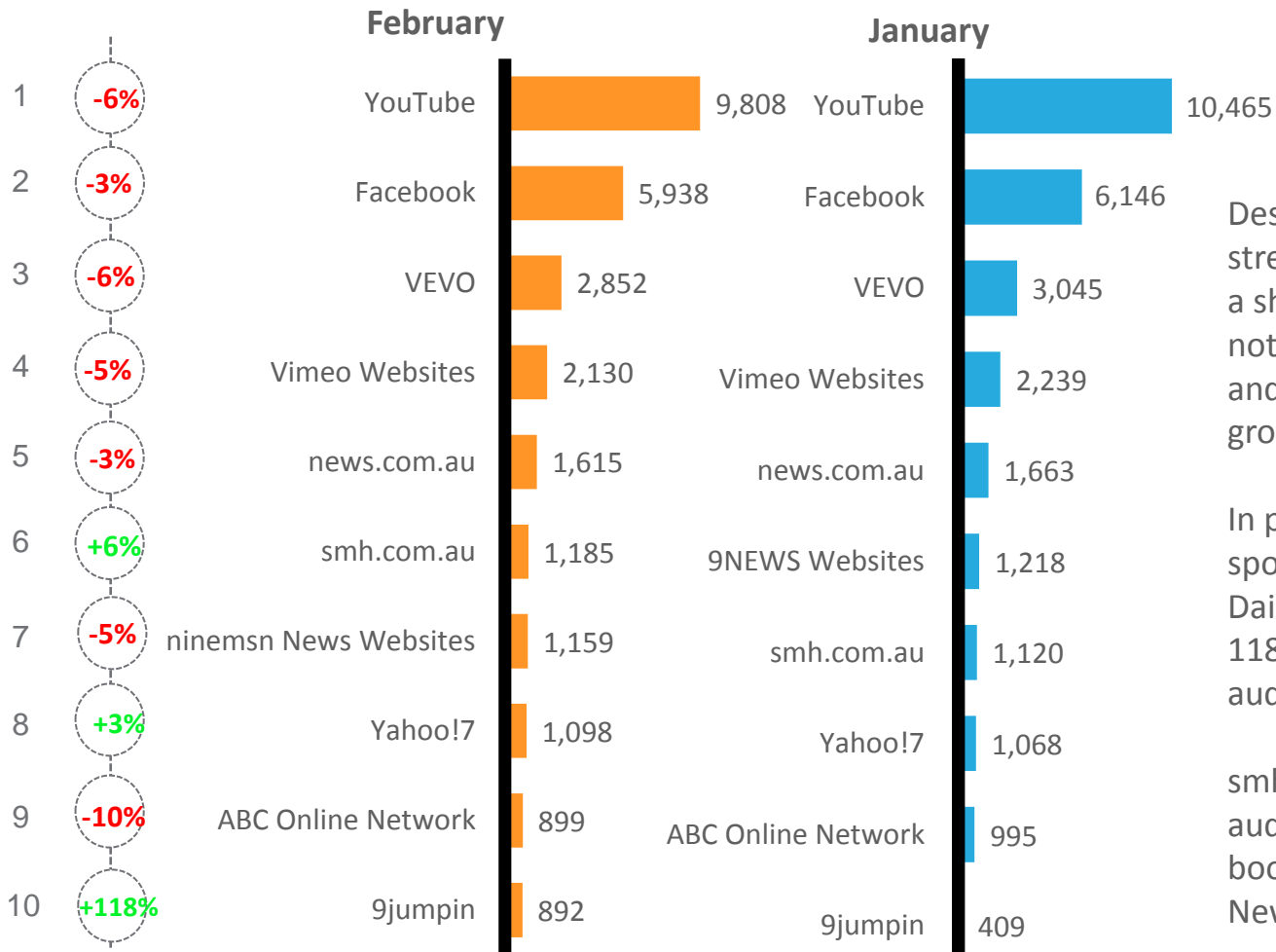
February 2015

Unique Audience Rank	Brand	Unique Audience (000s)	Total Streams	Time Per Person (hh:mm:ss)
1	YouTube	9,808	1,427,421	04:04:06
2	Facebook	5,938	176,034	01:31:53
3	VEVO	2,852	103,416	00:50:32
4	Vimeo Websites	2,130	6,902	00:16:10
5	news.com.au	1,615	13,008	00:09:46
6	smh.com.au	1,185	4,380	00:09:27
7	ninemsn News Websites	1,159	11,670	00:08:14
8	Yahoo!7	1,098	12,294	00:57:45
9	ABC Online Network	899	6,157	02:18:10
10	9jumpin	892	5,763	00:34:49

Including web-based applications

TOP BRANDS COMPARISON – HYBRID STREAMING

February 2015, Unique Audience (000)



Despite the general fall in hybrid streaming due to February being a shorter month, it is worth noting that Yahoo!7, smh.com.au and 9jumpin experienced growth.

In particular, 9jumpin climbed 14 spots since January, overtaking Dailymotion for 10th place with a 118% increase in unique audience.

smh.com.au also rose in terms of audience growth with a 6% boost, placing it above ninemsn News Websites.

GENDER BREAKDOWN – HYBRID STREAMING



6,446,000

Number of Streaming Australians

6,542,000

1,300,770

Total Streams Viewed (000s)

1,676,293

202

Streams per person

256

06:13:02

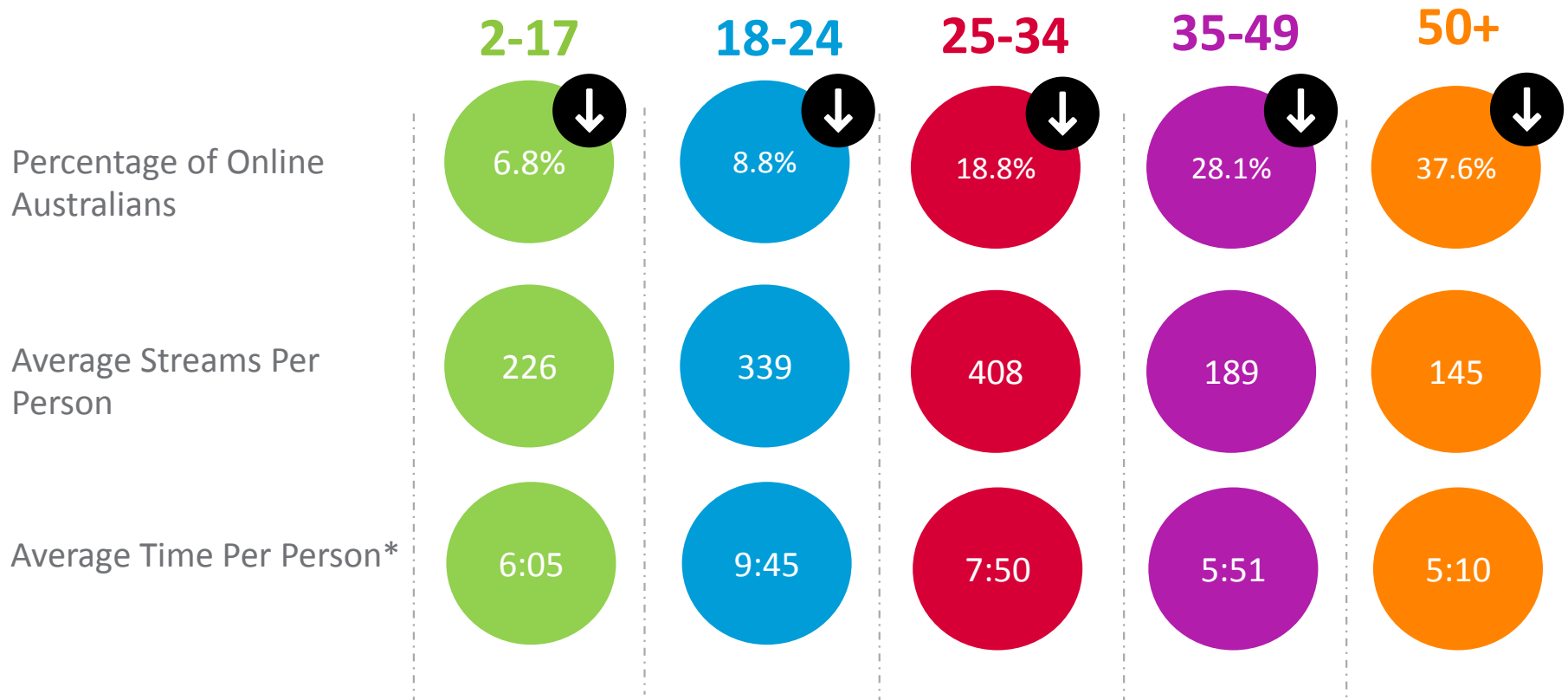
Time Per Person (HH:MM:SS)

06:27:05

Corresponding with the general trend of decreased online activity reported for the month of February, the number of streaming Australians fell. Despite this, female Australians experienced an increase in streams per person, climbing 5%.

HYBRID STREAMING: AGE DEMOGRAPHICS ONLINE

February 2015



Australians included in the 25-34 and the 35-49 age group experienced increases in average streams per person this month, with those aged 25-34 reporting the highest increase at 19% followed by 35-39 year olds at 2%.

↑ ↓ Indicates growth or decline based on the previous month

*HH:MM

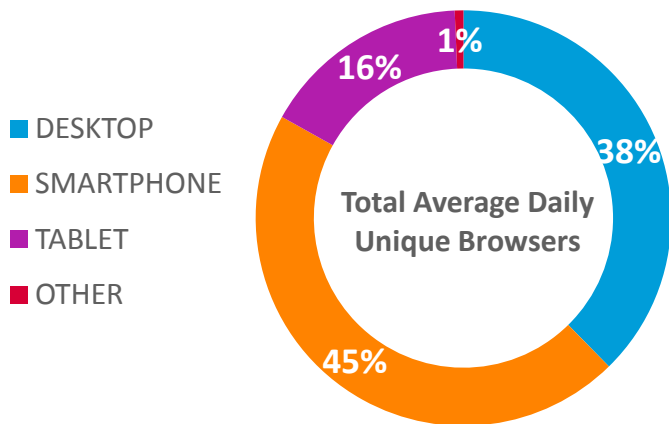
An abstract graphic on the left side of the slide. It features a series of concentric, curved lines that form a partial sphere or dome shape. The lines are colored in a gradient from purple to yellow. Several small, colored dots (yellow, pink, red) are scattered across the surface, with thin lines extending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

DEVICE HIGHLIGHTS

NIELSEN ONLINE RATINGS: MARKET INTELLIGENCE

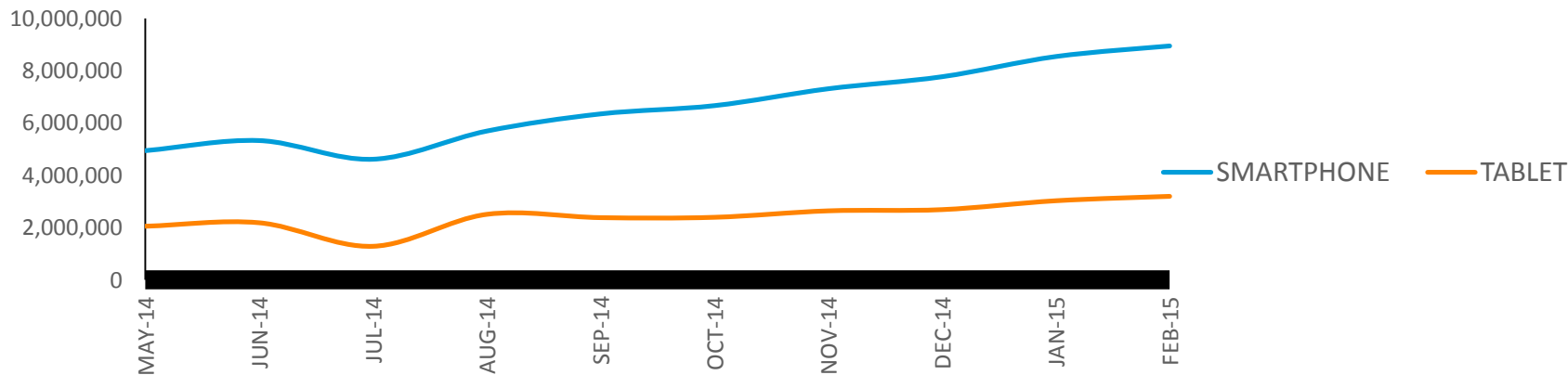
DEVICE TYPE COMPARISON (EXCLUDING APPLICATIONS)

February 2015 – Market Domain – Domestic Traffic



62% of total average daily unique browsers came from portable devices.

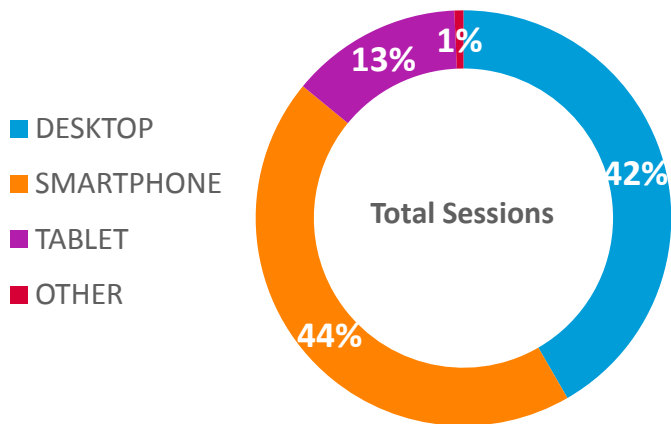
↑ 74% increase since May 2014 in total average daily unique browsers from portable devices



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

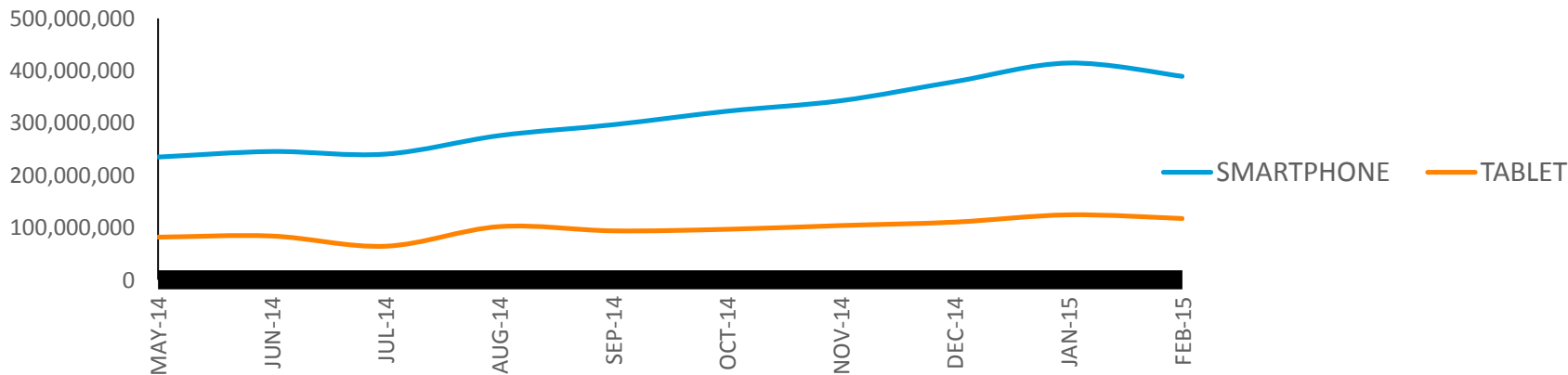
DEVICE TYPE COMPARISON (EXCLUDING APPLICATIONS)

February 2014 – Market Domain – Domestic Traffic



58% of total online sessions came from portable devices

↑ 60% increase since May 2014 in total online sessions from portable devices



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

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GENERAL UPDATES FOR THIS MONTH:

NIELSEN TWITTER TV RATINGS – FEBRUARY 2015



More than 1.4 million TV related Tweets
were viewed over 117 million times
across the month of February.

Just over 1 in every 2 TV related tweets for this month were about series programs such as reality, drama, & current affairs.

Sport was the next largest genre with 38% of all TV related tweets, followed by Special Events such as the Academy Awards and Grammy's.

iPhone was the number 1 second screen device with 40% of all TV related tweets being sent using the Twitter for iPhone app.

NIELSEN TWITTER TV RATINGS – FEBRUARY 2015

Monthly Top 5

Non-Sport

Rank	Network	Program	Unique Audience	Impressions	Unique Authors	Tweets
1	NINE	87th Annual Academy Awards	240.8K	3.8M	16.9K	58.4K
2	FOX8	57th Annual Grammy Awards	207.1K	1.8M	12.8K	44.7K
3	TEN	I'm A Celebrity Get Me Out Of Here!	152.8K	2.6M	7.2K	16.8K
4	TEN	I'm A Celebrity Get Me Out Of Here!	96.6K	682.5K	3.0K	6.1K
5	ABC	Q&A	94.0K	3.8M	8.5K	39.4K

Sport

Rank	Network	Program	Unique Audience	Impressions	Unique Authors	Tweets
1	SEVEN, ESPN	NFL Super Bowl	255.7K	3.3M	22.9K	65.2K
2	NINE, FOX SPORTS	ICC Cricket World Cup AU v ENG	228.8K	4.5M	12.5K	36.6K
3	SEVEN	2015 Australian Open Tennis	214.9K	4.0M	18.0K	47.1K
4	NINE, FOX SPORTS	ICC Cricket World Cup AUS v NZ	199.7K	3.4M	11.9K	37.3K
5	FOX SPORTS	ICC World Cup SRI v NZ	193.1K	2.2M	6.2K	14.0K

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COMING SOON: NIELSEN MOBILE RATINGS



COMING SOON: SMARTPHONE/ TABLET METRICS

Nielsen Mobile Ratings
will launch on **April 17***

Australia's first look at web
browsing and application usage
from smartphones and tablets

*pending approval by IAB
Australia's Measurement
Council



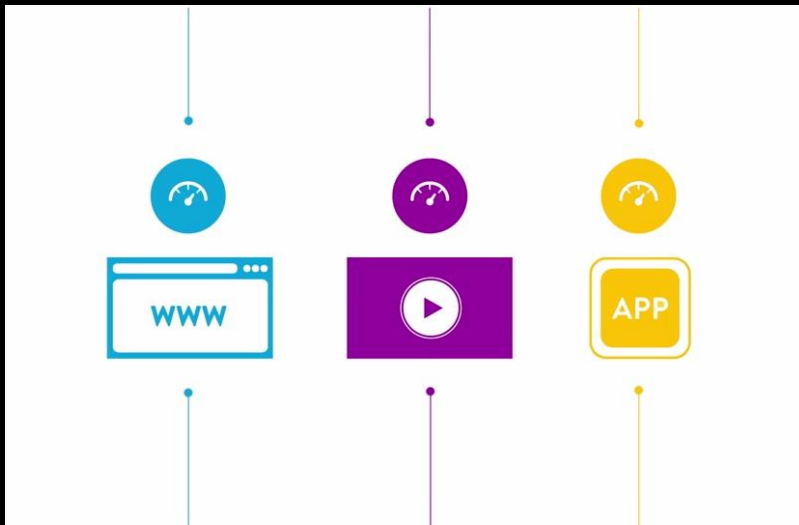
COMING SOON: FUSED DESKTOP / MOBILE METRICS

Digital Ratings (Monthly)
will launch in **October 2015***

Australia's first look at digital audiences with desktop/laptop, smartphone and tablet consumers itemised and de-duplicated.

*pending approval by IAB
Australia's Measurement
Council

WANT TO KNOW MORE?



Click on the video at left to learn more about the future of **Australia's** digital audience measurement.



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