

THE MOBILE STORY

NIELSEN MOBILE RATINGS

**IAB AUSTRALIA AND NIELSEN, SMARTPHONE
AND TABLET AUDIENCE MEASUREMENT**

AUSTRALIA, SEPTEMBER PREVIEW DATA 2015

nielsen + **iab.**
..... australia

A FIRST LOOK

IAB Australia and Nielsen are delighted to share with you the third Mobile Story report, drawing insights from the official release of industry-supported smartphone and tablet ratings preview data (Mobile Ratings) for the Australian market. This report is an important milestone in this particularly complex area of measurement and it marks yet another significant step forwards in measuring the digital media landscape in Australia.

With over 15 million Australians now owning a smartphone and some 11 million owning a tablet device, it's critical that the industry has access to audience measurement data which quantifies the importance of mobile media audiences and helps to inform marketing investments.

Over the past 18 months, there has been a significant amount of work and investment by Nielsen, the IAB Australia and the digital industry to build quality panels to measure smartphone and tablet users. The panels provide data on a monthly basis that can be used by media buyers and sellers to better understand the mobile consumer and assess the opportunities available in what is now a significant media channel. This report provides a first look at these results based on the mobile panel which consists of 2,000 smartphone users and 500 tablet users aged 18+.

The release of Nielsen Mobile Ratings is the first phase of a major upgrade to the digital measurement system in Australia which includes the following key dates:

- Digital Ratings (Monthly) – early 2016
- Digital Content Ratings (Daily) – mid 2016

These future developments will also bring methodological enhancements to help provide additional granularity and detail in the dataset. This will include data on in-app activity to help the market understand the range of content being consumed within applications that aggregate content from a range of publishers.

We anticipate that publishers and agencies alike will gain considerable insights from this report and we look forward to continuing to work closely with the industry to ensure Australia remains at the forefront of digital audience measurement globally.

KEY TAKEOUTS

The mobile universe – insights into mobile sessions

- In September 2015, 12.5 million Australians 18+ accessed the internet on their smartphones and 7 million accessed via a tablet.
- Australians 18+ spend just under 35 hours per person per month on smartphones, and just under 26 hours per person per month on tablet devices, with September 2015 marking the first month where time spent on tablets exceeded PCs – albeit marginally.
- Smartphone users 18+ average 199 sessions per month which is more than 4 times than that of people using PCs.
- Australians 18+ spend around 33 hours on smartphone apps and just under 4 hours on their smartphone browsers each month.
- Although the growth in smartphone and tablet device ownership has weakened in the past 3 months, time being spent on smartphones is increasing month-on-month.

Entertain, educate or excite me – getting consumer attention on mobile

- Entertainment, search and social categories are the largest in the Australian market and rival the U.S. market in terms of active reach (%).
- Social, video/movies, gaming, messaging, music, travel, finance and news & information categories all have larger audiences on smartphone than on PC.
- Social, entertainment and gaming drive the most time spent on smartphone and tablet.
- Australians 18+ now prefer to consume news & information content on their smartphone than tablet or PC.

Keeping consumers engaged

- Australians 18+ are spending over 10 hours per month on average engaging with entertainment content on their smartphone and close to 12 hours on tablet.
- Government, banking and classifieds & auctions sub-categories in Australia have a stronger active reach (%) compared to the U.S. market.
- The video streaming category is dominated by YouTube, with Netflix leading from a VOD perspective and Yahoo7 TV (PLUS7) leading the catch-up services on mobile devices.
- For the month of September, 5.0m Australians 18+ used sports services on their smartphone and 2.3m on their tablets.
- In September 2015, 8.2m Australians 18+ listened to music or viewed music-related content on their smartphone and 3.8m on tablet.
- Over 80% of the active reach (%) on smartphones for the top four banks – Commonwealth Bank, ANZ, NAB and Westpac – is generated by their respective applications.



ABOUT NIELSEN MOBILE RATINGS

In 2014, Nielsen, with funding from IAB Australia and leading digital publishers, built the first metered mobile panel in Australia consisting of 2,000 iOS and Android smartphones and 500 iOS and Android tablets. This panel is nationally representative of Australian smartphone and tablet internet users, has individual privacy agreements in place with all panellists and passively measures the online behaviour of panellists on their mobile device through an on-device meter (Android) or proxy solution (iOS). This panel is a vital first step in providing the Australian market with key insights into mobile audiences by directly measuring the actual behaviour of Australian people 18+ on their smartphones and tablets.

Giving a complete and independent view of mobile media consumption, Nielsen Mobile Ratings enables you to:

- Understand ACTUAL audience behaviour on mobile media.
- Track performance of mobile apps and sites against competitors and over time.
- Identify the best apps and sites to reach a sizeable and/or engaged audience.

On its own, the Nielsen Mobile Ratings data is not designed to provide the market with the final mobile trading currency. It will, however, be a vital first step in understanding mobile audiences and a fundamental input into our more comprehensive digital content and advertising measurement solutions launching later this year:

1. Nielsen will use the smartphone and tablet panel data as a fusion input along with our home/work PC panel data and tagged website data to create a new service named **Digital Ratings Monthly**, launching later this year. This service will provide total audience measurement for a website or app, as well as separate audiences split out by PC, smartphone or tablet devices.
2. Nielsen uses the smartphone and panel data in conjunction with a large scale panel provider to underpin **Mobile Digital Ad Ratings**, which launched on October 1, 2015. This service provides total audience measurement for a digital campaign as well as separate audiences split out by PC, and mobile devices.

It is important that the industry appreciates that Nielsen Mobile Ratings preview data will not report on in-app content consumption. It is designed to report on audiences visiting and using an app. Any content consumed in-app is credited to the app being used and not the publisher or owner of the content. This issue is difficult to resolve when using a panel-only methodology, however daily **Digital Content Ratings**, launching in 2016, and the corresponding introduction of our Software Development Kit (SDK) will solve for this issue.

Recommendations on how to use Nielsen Mobile Ratings data:

- Unique Audience is the lead metric to be used for rankings and understanding relativity.
- Understand the size of the total smartphone or tablet market, including Unique Audience by device (smartphone/tablet).
- For category analysis, including:
 - Overall category/subcategory audience by device (smartphone/tablet).
 - Browsing vs app audience by device.
- To determine Unique Audience rankings, including:
 - Identification of the range of content consumed & number of sites/apps with significant audience size.
 - Top Parents/Brands/Apps by Unique Audience.

Due to a reliance on panel-only measurement for Nielsen Mobile Ratings, time metrics have not been included at the entity level due to high likelihood of understatement. Category level time metrics have however been included as sample size is sufficiently robust.

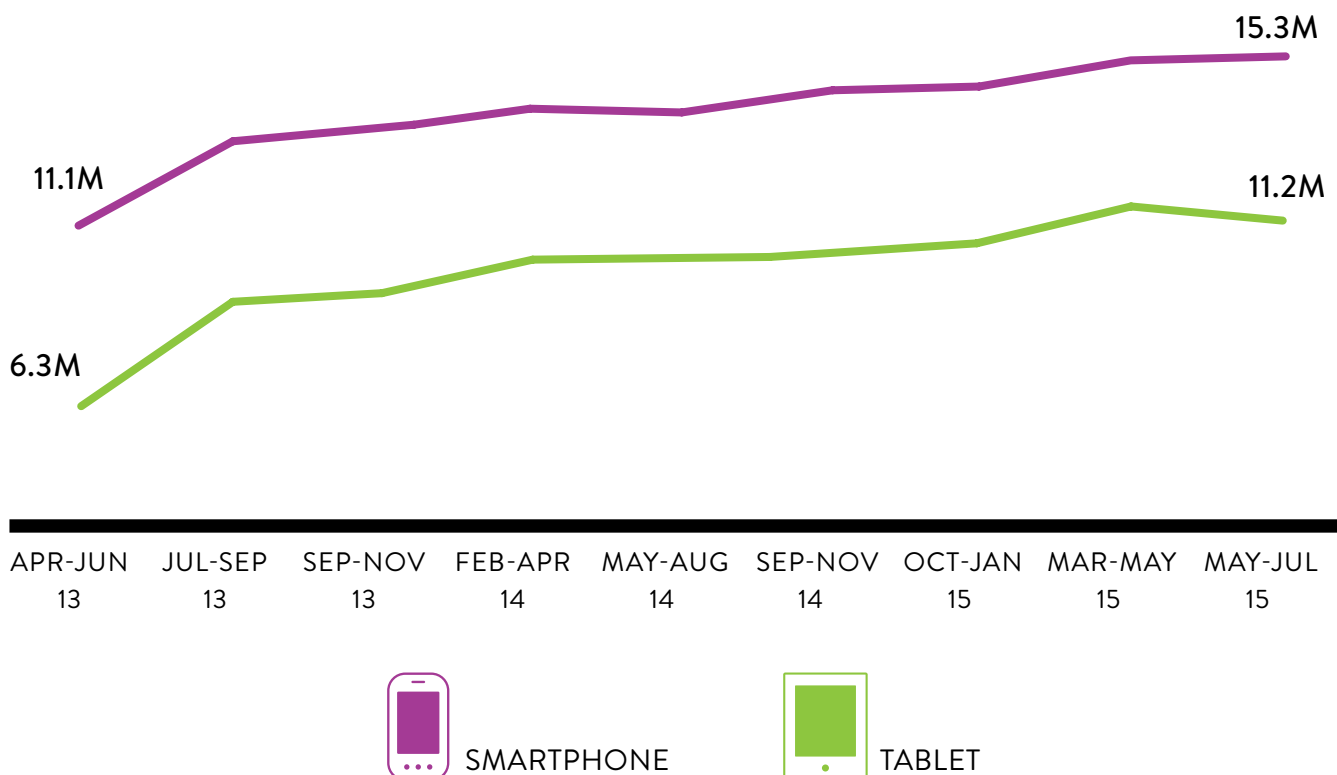
Audience metrics by device in Nielsen Mobile Ratings preview data are not summable as we are not yet accounting for cross-device duplication. This means that adding the smartphone audience to the tablet audience will not give you total mobile audience. Additionally, adding smartphone or tablet audience to PC audience (from Nielsen Online Ratings) will not give you a total cross-device audience. The capability to de-duplicate audiences across devices, as well as Operating System (iOS/Android) level data, will come with the launch of Digital Ratings Monthly in early 2016.

Finally, entities with small or insufficient sample size are noted throughout the report by an asterisk (*). These entities do not meet minimum sample size standards and may exhibit significant variability month-to-month.

GROWTH IN SMARTPHONE & TABLET DEVICE OWNERSHIP STABILISING

Over the past two years, there has been a 38% increase in people aged 14+ owning smartphones and an increase of 78% for tablet ownership. There is now a plateauing as penetration of smartphone sits at 15.3 million while in the three months ending July 2015, there was a slight decline in tablet ownership to 11.2 million.

SMARTPHONE AND TABLET OWNERSHIP



Source: IAB Australia/Nielsen Online Ratings Establishment Survey people aged 14+

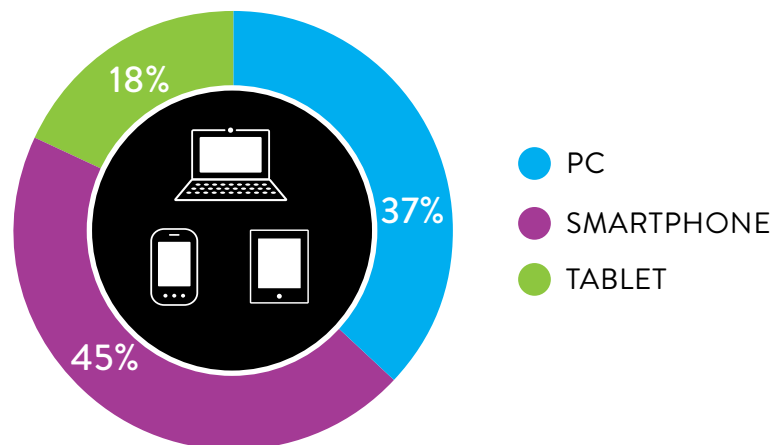
AUSTRALIANS 18+ SPEND MORE TIME ON SMARTPHONES THAN OTHER DIGITAL DEVICES

Average time per person among the active internet population 18+ spent either browsing or on applications is highest on smartphone, followed by tablets and then PCs.

	TIME PER PERSON PER MONTH
SMARTPHONE	34 hrs 50 mins
TABLET	25 hrs 59 mins
PC	25 hrs 25 mins

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+); Nielsen Online Ratings (Ppl 2+)

TOTAL TIME - MONTHLY - SEPTEMBER 2015



Source: Nielsen Mobile Ratings Preview Data (Ppl 18+); Nielsen Online Ratings (Ppl 2+)

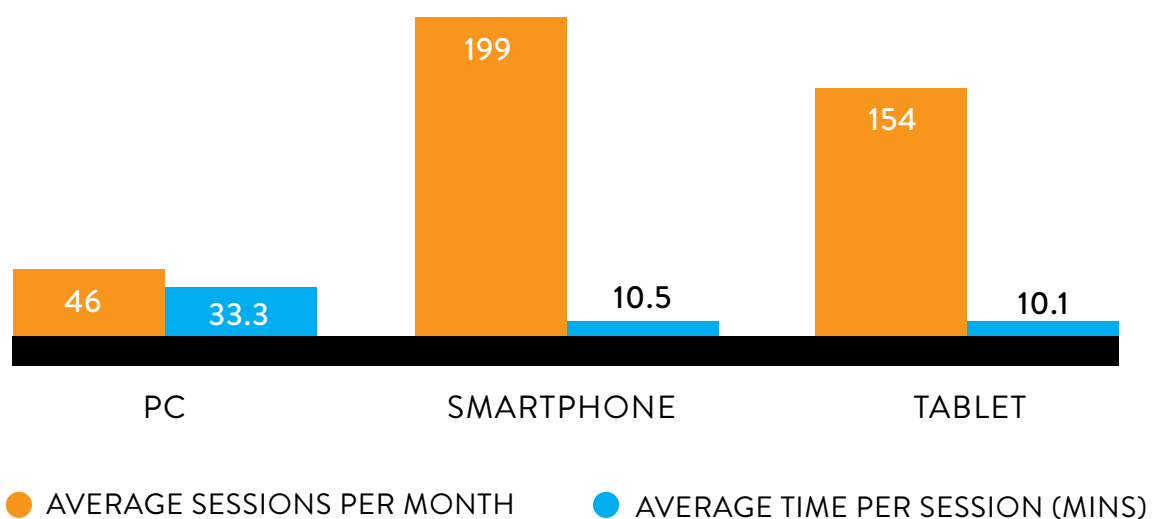
The overall digital time pool shows smartphone leading in total minutes, followed by PC and tablet.

MOBILE DEVICES DRIVE SHORTER AND MORE FREQUENT SESSIONS

People are using mobile devices in shorter and more frequent sessions than their PC. Interestingly, even though tablet content consumption differs from smartphones, the overall frequency and length of sessions is quite similar. Smartphone sessions are less than one third the length of PC sessions but more than four times as frequent.

Although smartphone and tablet sessions are considerably shorter than PC sessions – at around ten minutes per session – it is a significant amount of time, often across a range of activities, especially when considering the high frequency of sessions. It is expected that this frequency will continue to increase.



MONTHLY SESSION FREQUENCY & DURATION



Source: Nielsen Mobile Ratings Preview Data (Ppl 18+); Nielsen Online Ratings (Ppl 2+)

AUSTRALIAN SMARTPHONE ENGAGEMENT STILL HAS ROOM TO GROW

As we have seen in previous Nielsen research released in this market, Australia is seeing impressive growth in smartphone usage, although it continues to trail other leading markets in relation to time spent browsing the web or using applications. U.S. application time is around 9 hours more per month than in Australia. Time per person increased slightly from August to September for Australia and dropped slightly for the U.S. Browsing time dropped off slightly in both markets, to less than 4 hours in Australia and almost 7 hours in the U.S.

		TIME PER PERSON (HH:MM:SS)
 AUSTRALIA	APP	33:08:07
	BROWSER	3:55:40
 U.S.	APP	42:18:17
	BROWSER	6:50:31

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+); Nielsen Online Ratings (Ppl 2+)

CONTENT CATEGORY USAGE—U.S. VS AUSTRALIA

U.S. consumers are using a broader range of content and utilities, however there are a few categories where Australia saw higher reach and usage than the U.S. in September 2015:

- **GOVERNMENT** – Government services on smartphones in Australia are not currently as strong as PC however it is higher than in the U.S. Monthly reach of smartphone users for government sites is only 30% in the U.S. vs 38% in Australia. Most visited government properties for Australians 18+ include Department of Human Services, Bureau of Meteorology, ATO and a range of state-based transport services.
- **BANKING** – Australians 18+ are using banking services on their smartphones for more than Americans with an active reach of 62% vs 44% in the U.S. Applications on smartphones are the key driver of the reach difference, with apps like Commonwealth Bank's Netbank and ANZ goMoney most used in Australia.
- **CLASSIFIEDS & AUCTIONS** – Australia is the leading market for this sub-category with an active reach of 43% vs 38% in the U.S. Currently eBay and Gumtree are leading the market locally.

There are a number of categories that are ripe for an increase in usage in Australia as consumers use their devices more, connect to better quality internet and data plans evolve. The following categories have considerably higher smartphone usage in the U.S. compared to Australia:

- **COMMERCE & SHOPPING** – There is just under 15% reach difference in commerce and shopping services with the U.S. having an active reach of 83% vs 69% in Australia, with Americans spending an hour and half longer per month on commerce sites and applications.
- **VIDEO/MOVIES** – 78% of Americans smartphone users accessed a video site or application in September 2015 compared to 68% of Australians, with Americans spending nearly double the amount of time per person as Australians.

- **CURRENT EVENTS & GLOBAL NEWS** – One of the most popular genres on PCs in Australia and this is translating well to smartphones but when reviewing habits in America there is still considerable upside for this category in the Australian market with only 42% reach versus 54% in the U.S.
- **MASS MERCHANDISER** – 61% of U.S. smartphone users 18+ are actively using online mass merchandiser websites and apps compared to only 41% of Australian smartphone users for the same. Amazon is the leading entity driving this sub-category in both markets with Coles and Woolworths as runners up in Australia.



AUSTRALIAN MOBILE RANKINGS

While there is substantial fragmentation in usage across all digital devices, ratings data shows there are a considerable number of brands and apps on mobile devices with large audiences that are part of an individual's content repertoire.

	PC	SMARTPHONE	TABLET
BRANDS OVER 500,000 MONTHLY UNIQUE AUDIENCE	248	123	56
BRANDS OVER 1,000,000 MONTHLY UNIQUE AUDIENCE	112	56	23
APPLICATIONS OVER 500,000 MONTHLY UNIQUE AUDIENCE	N/A	75	27
APPLICATIONS OVER 1,000,000 MONTHLY UNIQUE AUDIENCE	N/A	40	13

RANKINGS – PARENTS

At a parent (or organisation) level - Google and Facebook continue to dominate on both smartphone and tablet devices in Australia. Local entities such as Telstra, Yahoo7, Fairfax Media and News Australia remain in the top 15 rankings on both smartphone and tablet devices.

SMARTPHONE - TOP 25 - PARENTS (WEB & APP)	
	UNIQUE AUDIENCE (000)
Google	11,696
Facebook	10,877
Apple Computer	6,188
eBay	5,937
Telstra Corporation	5,209
Yahoo7	4,889
Microsoft	4,801
Fairfax Media	4,356
Wikimedia Foundation	3,908
Australian Federal Government	3,818
News Australia	3,780
Twitter	3,529
Commonwealth Bank	3,348
The Weather Channel Interactive	3,324
Amazon	2,956
LinkedIn	2,651
Coles Group	2,603
Rakuten	2,484
Samsung Group	2,286
Pinterest.com	2,284
Nine Entertainment Co	2,256
WhatsApp	2,228
Vodafone	2,107
Woolworths	2,084
Snapchat	1,981

TABLET - TOP 25 - PARENTS (WEB & APP)	
	UNIQUE AUDIENCE (000)
Google	6,479
Facebook	5,895
Apple Computer	3,635
eBay	3,333
Microsoft	2,955
Twitter	2,362
Telstra Corporation	2,317
News Australia	2,315
Yahoo7	2,223
Australian Federal Government	2,074
Fairfax Media	2,060
Wikimedia Foundation	1,906
Pinterest.com	1,833
Amazon	1,734
LinkedIn	1,634
Nine Entertainment Co	1,594
Coles Group	1,485
Australian Broadcasting Corporation	1,325
Woolworths	1,156
Loyalty Pacific	1,113
Adobe	1,105
WordPress.com	1,094
Commonwealth Bank	1,045
InterActiveCorp	1,035
Electronic Arts	862

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

RANKINGS – BRANDS

SMARTPHONE - TOP 25 - BRANDS (WEB & APP)	
	UNIQUE AUDIENCE (000)
Google	11,587
Facebook	10,818
YouTube	7,725
Apple	6,170
Yahoo7	4,468
eBay	4,385
Instagram	3,721
Wikipedia	3,556
Twitter.com	3,444
Weather Channel Network	3,324
Commonwealth Bank	2,932
Telstra Media	2,862
PayPal	2,841
Telstra Corporate Websites	2,784
LinkedIn	2,651
MSN/WindowsLive/Bing	2,648
Gumtree	2,482
Viber	2,383
Samsung	2,286
Pinterest	2,284
WhatsApp	2,228
Department of Human Services	2,116
Vodafone	2,107
Snapchat	1,981
ABC Online Network	1,975

TABLET - TOP 25 - BRANDS (WEB & APP)	
	UNIQUE AUDIENCE (000)
Google	6,408
Facebook	5,886
YouTube	4,366
Apple	3,635
eBay	2,350
Twitter.com	2,311
Yahoo7	2,018
Pinterest	1,833
Wikipedia	1,831
PayPal	1,701
MSN/WindowsLive/Bing	1,650
LinkedIn	1,634
Microsoft	1,410
Amazon	1,336
ABC Online Network	1,325
Telstra Media	1,316
Skype	1,274
Telstra Corporate Websites	1,243
Instagram	1,232
FlyBuys	1,113
Adobe	1,105
WordPress.com	1,094
Wikimedia Foundation	1,069
Gumtree	981
taste.com.au	905

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

RANKINGS – APPLICATIONS

Nine out of the top ten applications on both smartphones and tablets are owned by Facebook, Google and Apple, with eBay taking the ninth spot on both smartphone and tablet rankings and Skype (owned by Microsoft) taking the tenth spot for tablet rankings.

SMARTPHONE - TOP 25 - APPS (WEB & APP)		TABLET - TOP 25 - APPS (WEB & APP)	
	UNIQUE AUDIENCE (000)		UNIQUE AUDIENCE (000)
Facebook	8,867	Facebook	4,355
Facebook Messenger	7,980	Facebook Messenger	3,301
Apple Music	5,155	Apple Music	2,714
Google Maps	5,105	Google Search#	2,024
Google Search#	4,759	YouTube (downloadable)	1,680
Google Play	4,736	Google Play	1,581
Gmail - email from Google	3,735	Gmail - email from Google	1,544
Maps(Apple)	3,614	Google Maps	1,478
eBay Mobile	3,191	eBay Mobile	1,248
YouTube	3,185	Skype	1,236
Weather	3,135	Maps(Apple)	1,206
Instagram	3,103	iBooks	1,136
CommBank	2,555	YouTube	1,042
Viber	2,383	Instagram	889
WhatsApp Messenger	2,225	Twitter	836
YouTube (downloadable)	2,119	Pinterest	834
Snapchat	1,969	Chrome#*	749
Google Drive - free online storage from Google	1,895	Dropbox	680
Skype	1,812	Google Drive	672
Telstra 24x7	1,788	PayPal	619
Google+	1,779	CommBank	598
Dropbox	1,723	Spotify Music	591
Twitter	1,670	Telstra 24x7	566
PayPal	1,668	Netflix	557
ANZ goMoney Australia	1,522	Adobe Acrobat Reader	556

#Google Search App and Chrome App audience is understated due to an iOS measurement limitation, which is currently being addressed.

Note: Entities marked with an asterisk (*) do not meet minimum sample size standards and may exhibit significant variability month-to-month.

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

ENTERTAINMENT, SEARCH AND SOCIAL CONTENT LEAD ON MOBILE DEVICES

Although there are differences in category usage across different devices, there are very strong monthly audiences and reach across a large range of categories. As we have seen from U.S. data, this is likely to increase.




MONTHLY AUDIENCE (MILLIONS)	PC	SMARTPHONE	TABLET
Entertainment	11.6	11.9	6.7
Search	11.0	11.1	6.1
Computers & Electronics	10.5	5.6	3.7
Portals	10.8	8.2	4.5
Telcom/Internet Services	10.5	6.9	4.0
News & Information	9.3	10.1	4.9
Social	8.9	11.6	6.2
Commerce & Shopping	8.9	8.7	5.0
Finance	8.7	9.2	4.0
Govt & Non profit	7.8	5.1	2.8
Videos/Movies	7.5	8.6	4.8
Family & Lifestyles	7.6	7.5	3.6
Home & fashion	7.8	6.6	3.9
Travel	7.5	9.5	4.6
Corporate Information	6.3	5.4	3.2
Education & Careers	5.9	4.7	2.3
Sport	4.9	4.9	2.3
Gaming	4.2	7.5	4.5
Automotive	3.2	2.0	1.3
Messaging	3.3	8.1	3.6
Music	2.7	8.2	3.8

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+); Nielsen Online Ratings (Ppl 2+)

CERTAIN CATEGORIES DRIVE STRONGER REACH ON MOBILE VERSUS PC, AND VICE VERSA

The News & Information category in the “larger reach” column continues to see growth on mobile devices. Interestingly, Australians 18+ now prefer to consume their news and information content on their smartphones on top of any other digital device. We can expect to see most of the categories specified in the “larger reach” column continue to see usage growth on mobile devices.

The “similar reach” column highlights categories that already have similar monthly reach numbers to PC. The “smaller reach” column is likely to change over the next 12 months. Note that mobile in the below table refers to an average across smartphone and tablet devices.

 LARGER REACH ON MOBILE	 SIMILAR REACH ACROSS PLATFORMS	 SMALLER REACH ON MOBILE
ENTERTAINMENT	AUTOMOTIVE	COMPUTERS/ELECTRONICS
VIDEO/MOVIES	COMMERCE	GOVERNMENT
GAMING	CORPORATE	TELECOM/INTERNET
MESSAGING	EDUCATION	PORTALS
MUSIC	LIFESTYLE	
TRAVEL	FINANCE	
SOCIAL	HOME/FASHION	
NEWS & INFO	SPORT	

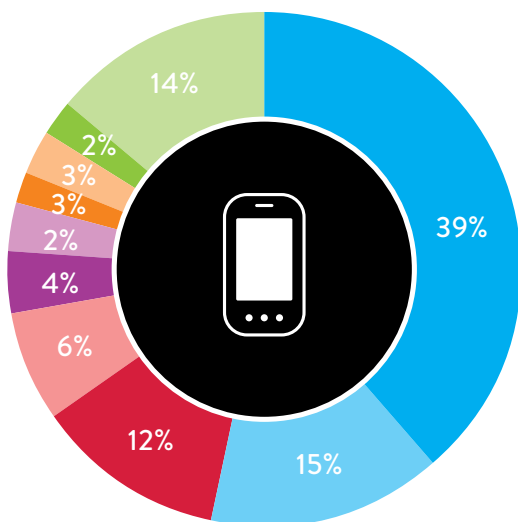
DISTRIBUTION OF TIME ACROSS CATEGORIES IS SIMILAR ON SMARTPHONE & TABLET

Similar to research previously released by Nielsen, Nielsen Mobile Ratings is showing close to 40% of smartphone time is spent on social and just over a quarter of the total tablet time is on social. Entertainment and gaming follow on from social in relation to time consumption, with the fast growing area of messaging behind these categories.

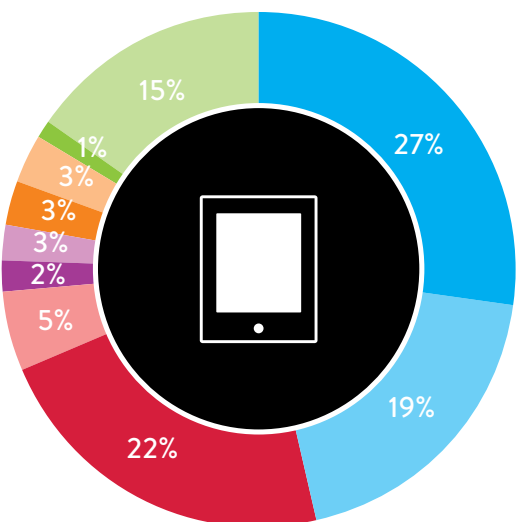
Note: Any in-app activity that may differ in purpose from the primary application is not split out currently. Please see the 'About Nielsen Mobile Ratings' section for more information.

DISTRIBUTION OF TIME SPENT

DISTRIBUTION OF TIME SPENT - SMARTPHONE



DISTRIBUTION OF TIME SPENT - TABLET



- SOCIAL
- ENTERTAINMENT (EX GAMING)
- GAMING
- MESSAGING
- PRODUCTIVITY
- NEWS & INFO
- COMMERCE
- SEARCH
- HEALTH
- OTHER

CURRENT EVENTS & GLOBAL NEWS CATEGORY

Both the smartphone and tablet rankings are dominated by the same brands that have historically been strong in PC ratings. For the month of September news.com.au topped the rankings on smartphone and tablet.

SMARTPHONE - TOP 10 - CURRENT EVENTS & GLOBAL NEWS ENTITIES (INCL APPS)

	UNIQUE AUDIENCE (000)
news.com.au	1,526
smh.com.au	1,306
ABC News Websites	1,083
Daily Mail Australia	859
The Guardian	749
ninemsn News Websites	734
Yahoo!7 News Websites	719
The Age	699
Herald Sun	603
The Daily Telegraph	595

TABLET - TOP 10 - CURRENT EVENTS & GLOBAL NEWS ENTITIES (INCL APPS)

	UNIQUE AUDIENCE (000)
news.com.au	833
smh.com.au	777
Yahoo!7 News Websites	514
Daily Mail Australia	490
ninemsn News Websites	418
ABC News Websites	401
BBC*	336
Herald Sun*	324
The Guardian*	317
The Daily Telegraph*	316

Note: Entities marked with an asterisk (*) do not meet minimum sample size standards and may exhibit significant variability month-to-month.

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

ENTERTAINMENT CATEGORY

The entertainment category includes a wide range of content, much of which drives very high duration. In September, people spent over 10 hours with entertainment-related content on smartphones and close to 12 hours on tablets.

Compared to PC, the entertainment category has a significantly stronger active reach on smartphones – 95% vs 81%. Three sub-categories on smartphone (and tablet) are the key drivers of both time and reach for entertainment content – Video/Movies, Music and Gaming.

SMARTPHONE - ENTERTAINMENT - TOP SUB CATEGORIES		
	UNIQUE AUDIENCE (000)	TIME PER PERSON (HH:MM:SS)
Entertainment - Total	11,877	10:24:54
Video/Movies	8,580	01:08:52
Music	8,193	04:54:33
Gaming	7,502	07:11:06
Multi-category Entertainment	5,847	00:35:05
Sports	4,853	01:18:14
Broadcast Media	3,544	00:30:32
Books/Magazines/Comics	2,940	00:55:02

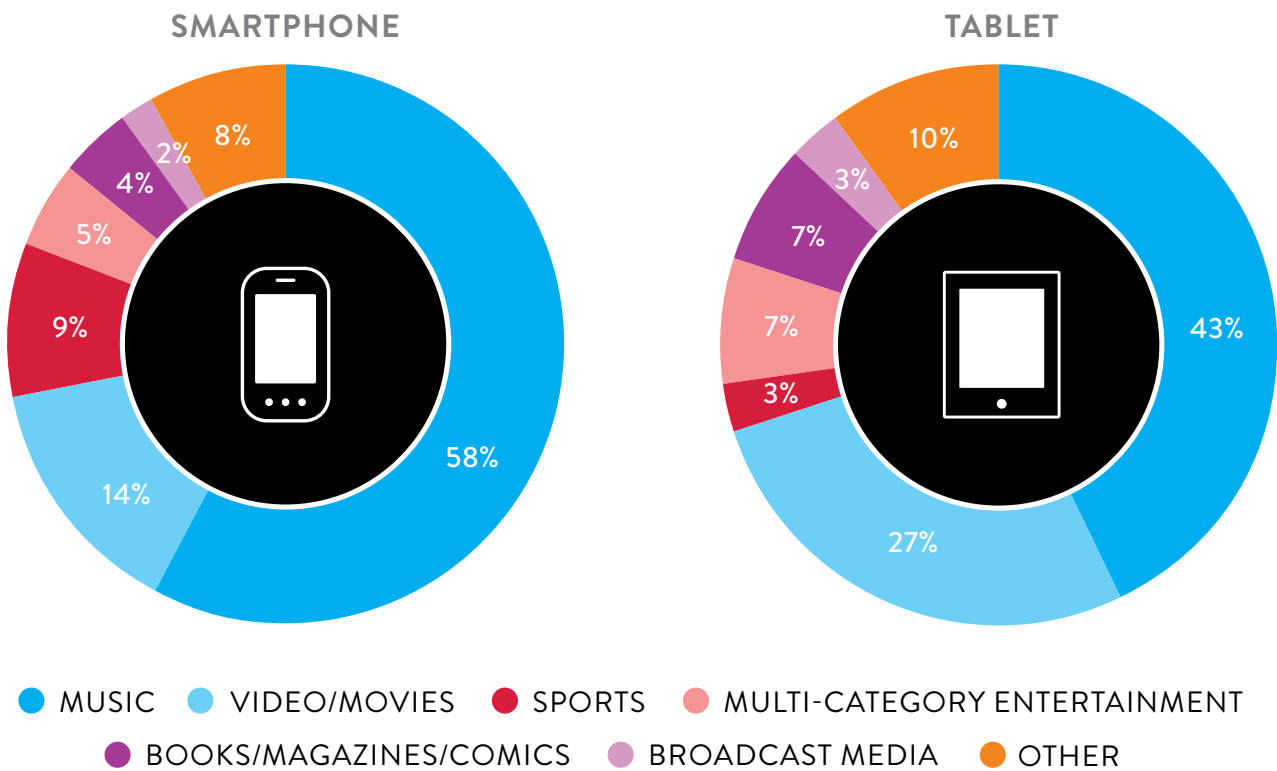
TABLET - ENTERTAINMENT - TOP SUB CATEGORIES		
	UNIQUE AUDIENCE (000)	TIME PER PERSON (HH:MM:SS)
Entertainment - Total	6,739	11:42:44
Video/Movies	4,771	02:02:32
Gaming	4,532	09:22:51
Music	3,799	04:08:00
Multi-category Entertainment	3,424	00:42:17
Broadcast Media	2,734	00:25:21
Sports	2,292	00:33:20
Books/Magazines/Comics	2,331	01:30:04

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)



The charts below depict the distribution of time within the entertainment category (excluding gaming) which shows the dominance of streaming-heavy categories, both video and audio. Tablet in particular is strong for video content – almost double the amount of time is spent viewing video or video-related content compared to smartphone.

DISTRIBUTION OF TIME - ENTERTAINMENT CATEGORY (EXCL GAMING)



ENTERTAINMENT -VIDEO STREAMING

Video streaming services are spread across two entertainment subcategories –video/movies and broadcast media. The tables below show metrics for entities from both these categories.

Specific entities generating healthy audiences and reach include Google-owned YouTube, the overall leader for video, driven by their user generated short-form content. VOD content is led by Netflix, a relatively new entrant into the Australian market and catch up services are led by Yahoo7 TV.

SMARTPHONE – TOP 5 ENTITIES – VIDEO/ MOVIES & BROADCAST MEDIA (INCL APPS)	
	UNIQUE AUDIENCE (000)
YouTube	7,725
Netflix	804
Yahoo7 TV	707
Vimeo Websites	697
TenPlay	417

TABLET – TOP 5 ENTITIES – VIDEO/ MOVIES & BROADCAST MEDIA (INCL APPS)	
	UNIQUE AUDIENCE (000)
YouTube	4,366
Yahoo7 TV*	695
Netflix	610
ABC iView	515
Vimeo Websites*	476

Note: Entities marked with an asterisk (*) do not meet minimum sample size standards and may exhibit significant variability month-to-month.
Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

ENTERTAINMENT – MUSIC

Music is the second largest driver of active reach and unique audience within the entertainment category (after Video/Movies). In September, 8.2 million Australians 18+ listened to music or viewed music-related content on their smartphone and 3.8 million did the same on tablets. Apple Music, Shazam and Spotify are the leaders on smartphones with SoundCloud ranking strongly in third place for tablet devices.

SMARTPHONE – TOP 5 ENTITIES – MUSIC (INCL APPS)	
	UNIQUE AUDIENCE (000)
Apple Music	5,155
Shazam	1,456
Spotify	1,132
Google Play Music	894
SoundCloud	595

TABLET – TOP 5 ENTITIES – MUSIC (INCL APPS)	
	UNIQUE AUDIENCE (000)
Apple Music	2,714
Spotify	672
SoundCloud*	341
Pandora.com*	290
Google Play Music*	158

Note: Entities marked with an asterisk (*) do not meet minimum sample size standards and may exhibit significant variability month-to-month.

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

ENTERTAINMENT -SPORT

Telstra Media AFL continues to lead the sports category on both smartphone and tablet devices in Australia. For the month of September, 5.0m Australians 18+ viewed sport content on their smartphone spending 1 hour and 20 minutes on average and 2.3m used tablet devices spending 33 minutes.

SMARTPHONE - TOP 5 ENTITIES – SPORT (INCL APPS)	
	UNIQUE AUDIENCE (000)
Telstra Media AFL	1,425
ESPN Digital Network	960
Telstra Media NRL	909
FOX SPORTS	485
news.com.au - sport	354

TABLET - TOP 5 ENTITIES – SPORT (INCL APPS)	
	UNIQUE AUDIENCE (000)
Telstra Media AFL	688
ESPN Digital Network*	384
Telstra Media NRL*	333
FOX SPORTS*	309
news.com.au - sport*	216

Note: Entities marked with an asterisk (*) do not meet minimum sample size standards and may exhibit significant variability month-to-month.

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

FINANCE - BANKING

In September 2015, nearly 8 million Australians 18+ used their smartphone for their banking needs and 3 million Australians 18+ did the same on tablet devices.

Commonwealth Bank is the leader in this category on both smartphone and tablet devices, followed by ANZ. Over 80% of the active reach (%) on smartphones for the top four banks – Commonwealth Bank, ANZ, NAB and Westpac – is generated by their respective applications.

SMARTPHONE - TOP 5 - BANKING ENTITIES (INCL APPS)	
	UNIQUE AUDIENCE (000)
Commonwealth Bank	2,932
ANZ	1,806
National Australia Bank	1,481
Westpac Banking	1,330
ING Direct	721

TABLET - TOP 5 - BANKING ENTITIES (INCL APPS)	
	UNIQUE AUDIENCE (000)
Commonwealth Bank	799
ANZ	699
Westpac Banking	575
National Australia Bank	564
ING Direct*	258

Note: Entities marked with an asterisk (*) have a do not meet minimum sample size standards and may exhibit significant variability month-to-month.

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

AUTOMOTIVE INFORMATION, CAREER DEVELOPMENT & REAL ESTATE

Australia has historically been a global leader both in advertising revenue and PC usage for the three leading classifieds sub-categories – automotive, careers and real estate – with strong local players leading the market.

In September, 1.2 million Australians 18+ used their smartphone to seek automotive information online. 661,000 did the same on tablets. Carsales.com.au leads the category on both smartphones and tablets. This is followed by Gumtree Automotive Websites on smartphone and carsGuide.com.au on tablets.

SMARTPHONE - TOP 5 - AUTOMOTIVE INFORMATION ENTITIES (INCL APPS)	
	UNIQUE AUDIENCE (000)
carsales.com.au	595
Gumtree Automotive Websites	256
carsGuide.com.au*	147
Drive.com.au*	108
Carsalesnetwork.com.au*	100

TABLET - TOP 5 - AUTOMOTIVE INFORMATION ENTITIES (INCL APPS)	
	UNIQUE AUDIENCE (000)
carsales.com.au*	196
carsGuide.com.au*	84
Gumtree Automotive Websites*	60
CarAdvice*	52
Carsalesnetwork.com.au*	42

Note: Entities marked with an asterisk (*) do not meet minimum sample size standards and may exhibit significant variability month-to-month.

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

Seek continues to lead the career category, followed by Indeed on both smartphone and tablet devices.

SMARTPHONE - TOP 5 - CAREER ENTITIES (INCL APPS)	
	UNIQUE AUDIENCE (000)
Seek	1,484
Seek Jobs	996
Indeed	608
careerone.com.au	395
careerone - Jobs*	240

TABLET - TOP 5 - CAREER ENTITIES (INCL APPS)	
	UNIQUE AUDIENCE (000)
Seek	463
Seek Jobs*	395
Indeed*	343
careerone.com.au*	161
careerone - Jobs*	131

The Real Estate/Apartments category is dominated by two entities. Realestate.com.au is the category leader, followed by Domain. Historically these entities have been strong on mobile devices as well as on PC ratings.

SMARTPHONE - TOP 5 - REAL ESTATE ENTITIES (INCL APPS)	
	UNIQUE AUDIENCE (000)
realestate.com.au	1,553
Domain	1,134
realestate.co.nz*	249
OnTheHouse.com.au*	152
Gumtree Realestate Websites*	138

TABLET - TOP 5 - REAL ESTATE ENTITIES (INCL APPS)	
	UNIQUE AUDIENCE (000)
realestate.com.au	728
Domain	523
OnTheHouse.com.au*	134
realestate.co.nz*	132
LJ Hooker*	56

Note: Entities marked with an asterisk (*) do not meet minimum sample size standards and may exhibit significant variability month-to-month.

Source: Nielsen Mobile Ratings Preview Data (Ppl 18+)

ABOUT IAB AUSTRALIA

The Interactive Advertising Bureau (IAB) Limited is the peak trade association for online advertising in Australia and was incorporated in July 2010. As one of over 40 IAB offices globally, and with a rapidly growing membership, IAB Australia's principal objective is to support and enable the media and marketing industry to ensure that they thrive in the digital economy.

The role of the IAB is to work with its members and the broader advertising and marketing industry to assist marketers to identify how best to employ online as part of their marketing strategy, to better target and engage their customers and build their brands.

By addressing the core pillars of growth of the online advertising industry - simplified and standard online audience measurement, research, and online operational standards and guidelines, and regulatory affairs, IAB Australia leverages the skills, experience and commitment of its members to advocate the benefits of online advertising by acting as an authoritative and objective source for all online advertising issues whilst promoting industry-wide best practice.

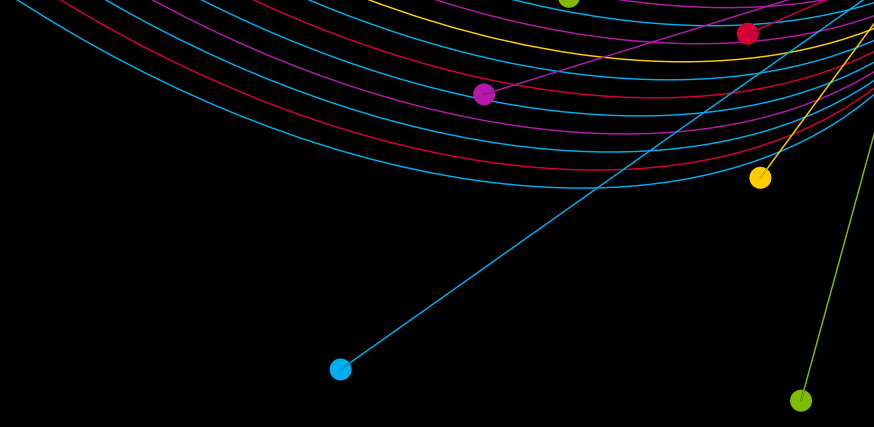
IAB Australia is a registered not-for-profit organisation; membership fees and revenue generated is invested back into the IAB's membership benefits such as resources, events, reporting, and industry representation.

ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers watch and buy. Nielsen's Watch segment provides media and advertising clients with Total Audience measurement services for all devices on which content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen also provides its clients with analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries, covering more than 90% of the world's population.

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