

State of the online market - Australia

Nielsen Online Ratings



November 2011

nielsen
.....



The amount of time spent online is increasing as social networking and websites are becoming more and more interactive...

With over 20 million Australians now enjoying access to the internet, what we watch and buy, and how we consume and engage with media, is rapidly evolving.

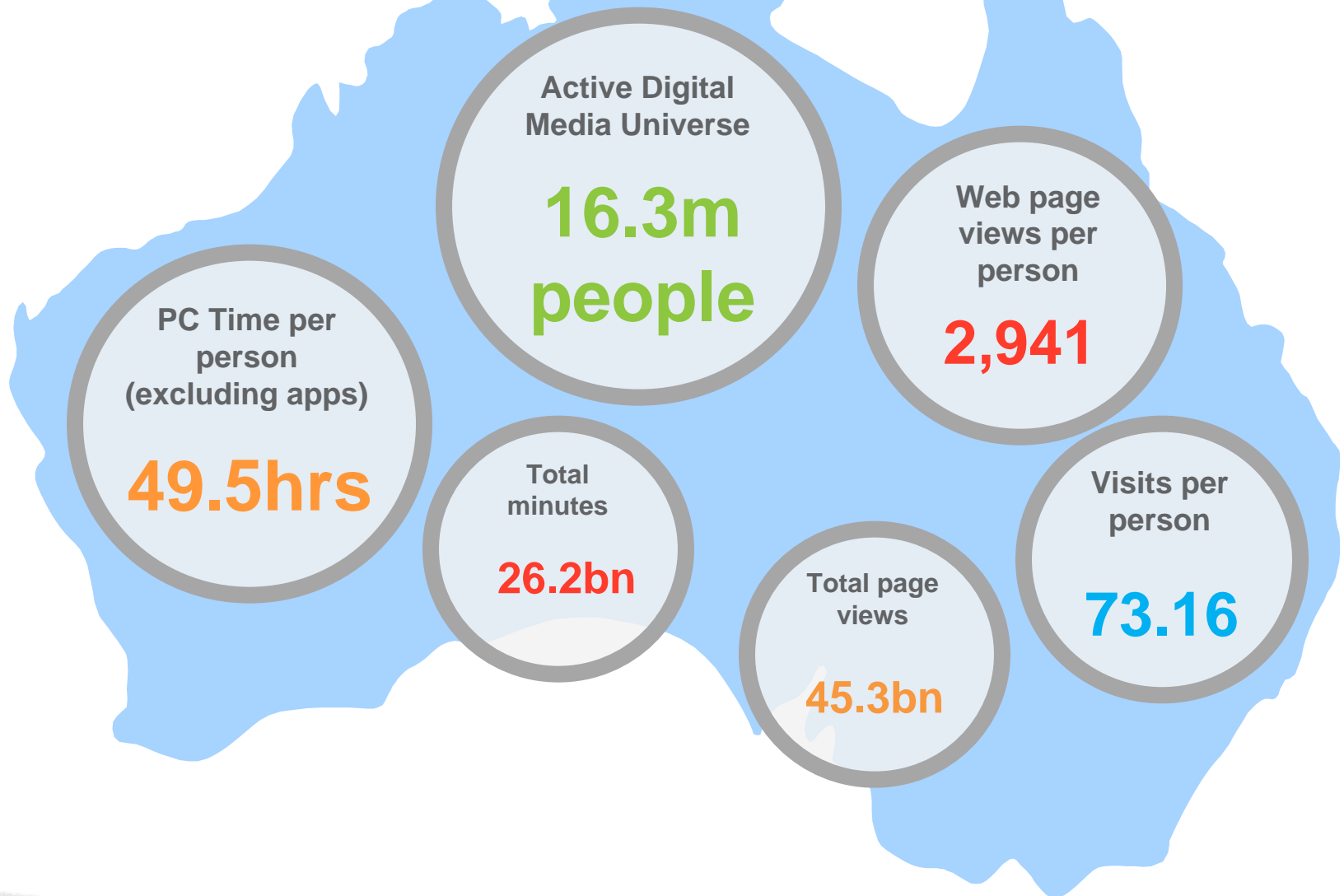
The 'anywhere anytime' nature of the internet, means that Mobile internet multimedia devices are presenting more customer touch points for presenting content and choices for communication distribution.

Nielsen Online Ratings now provides marketers with a single set of industry endorsed metrics, which quantifies how many human beings – not browsers – are visiting and interacting with websites.

Matt Bruce –Managing Director, Nielsen Audience Measurement APMEA



Australian online universe - key statistics



How many of Australia's 22.6 million people are online?



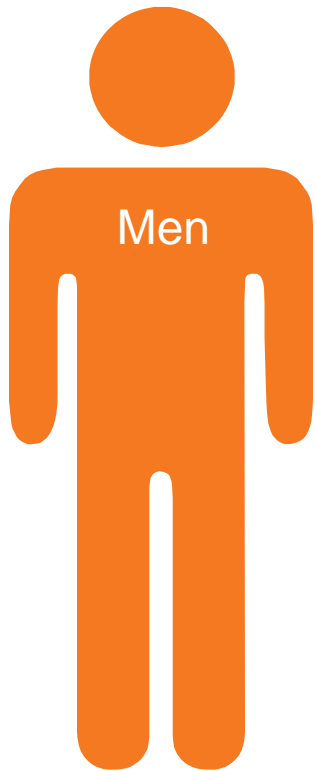
20.1m Total universe



16.4m - Active Monthly



Men and Women – online gender nuances

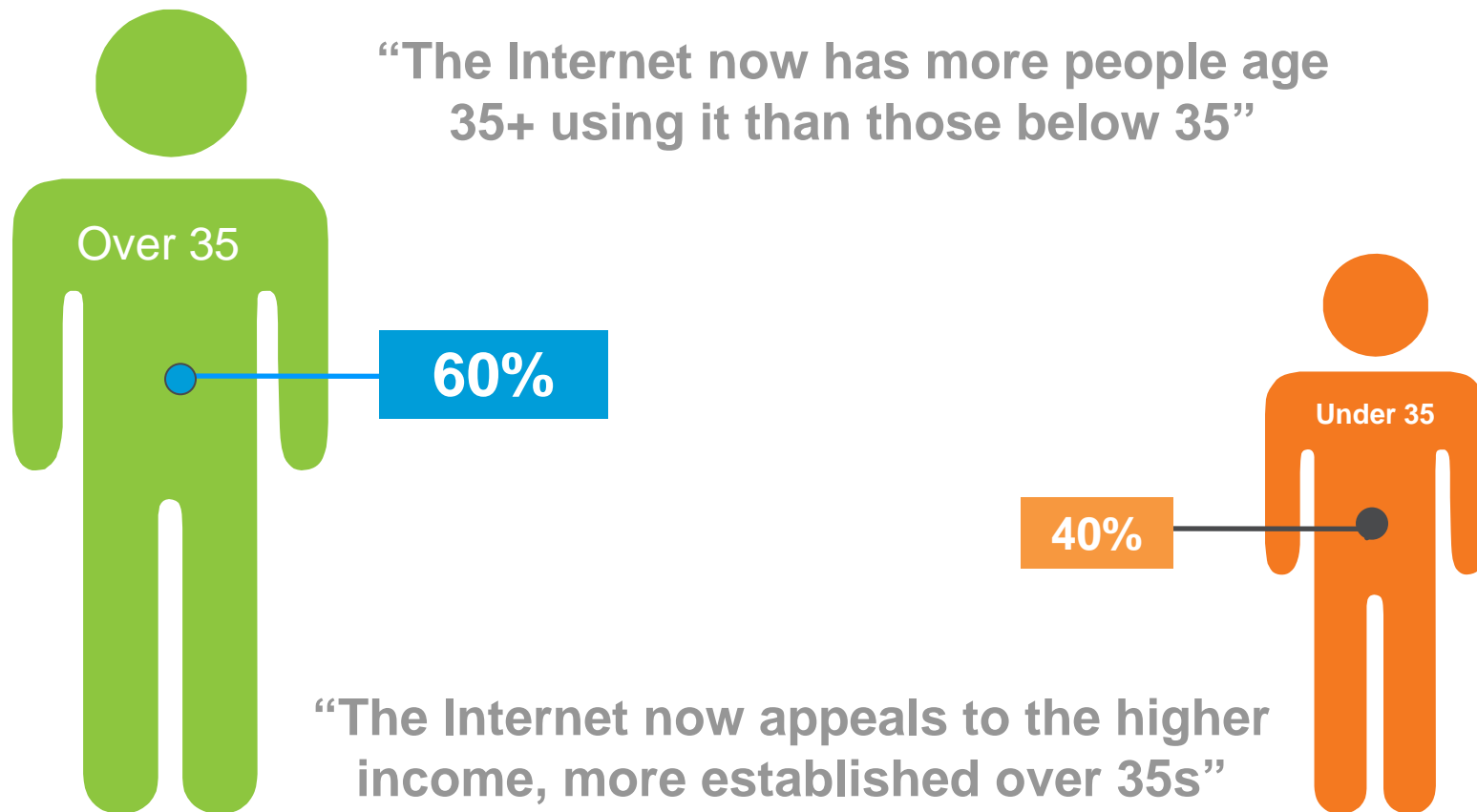


51%	% of online Australians	49%
2728	Average pages viewed per month	3164
72	# visits per month	74
71hrs	Average PC time per month	72hrs

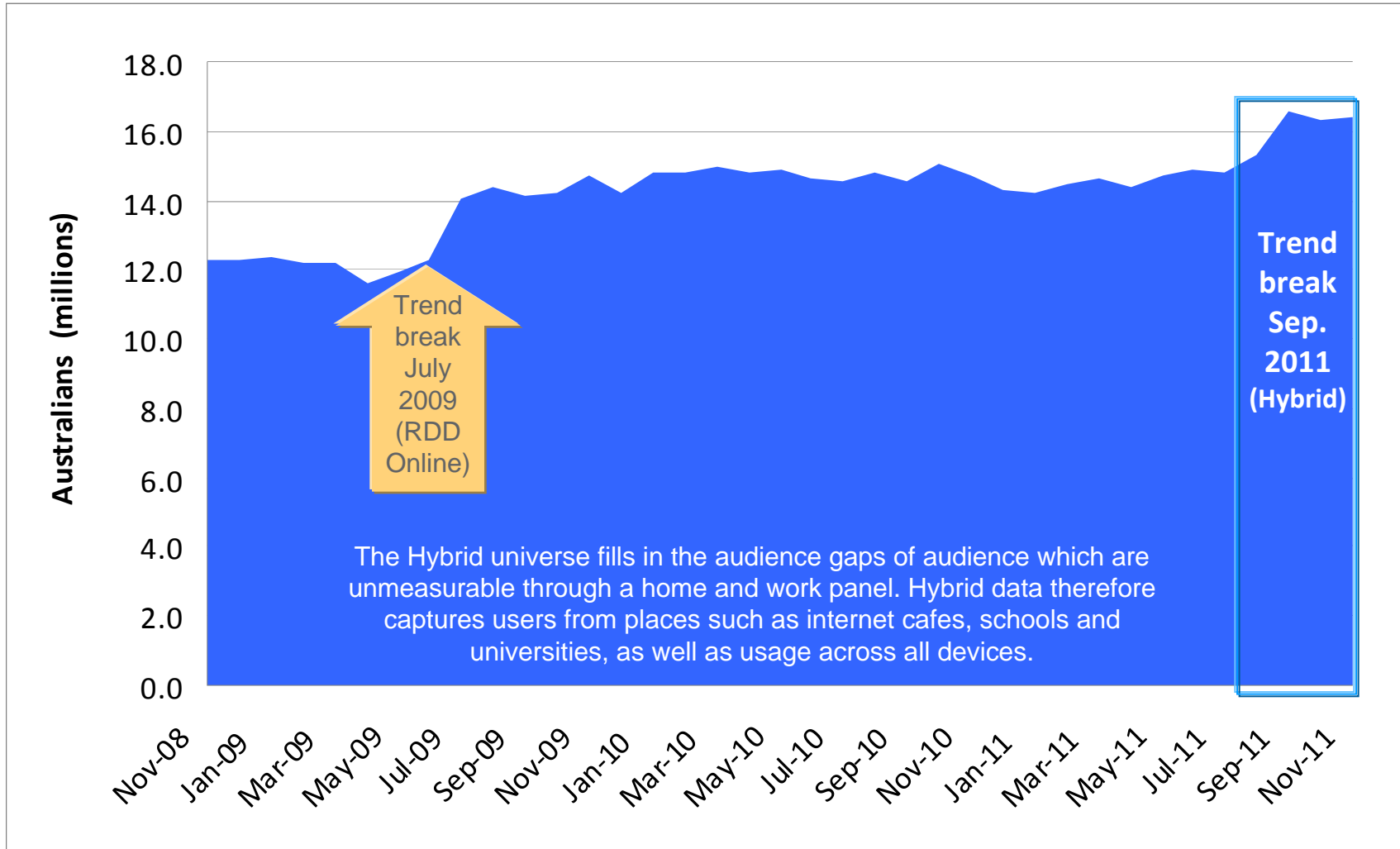


“Whilst there is a slight male skew in terms of % online, activity rates for men have dropped significantly between October and November”

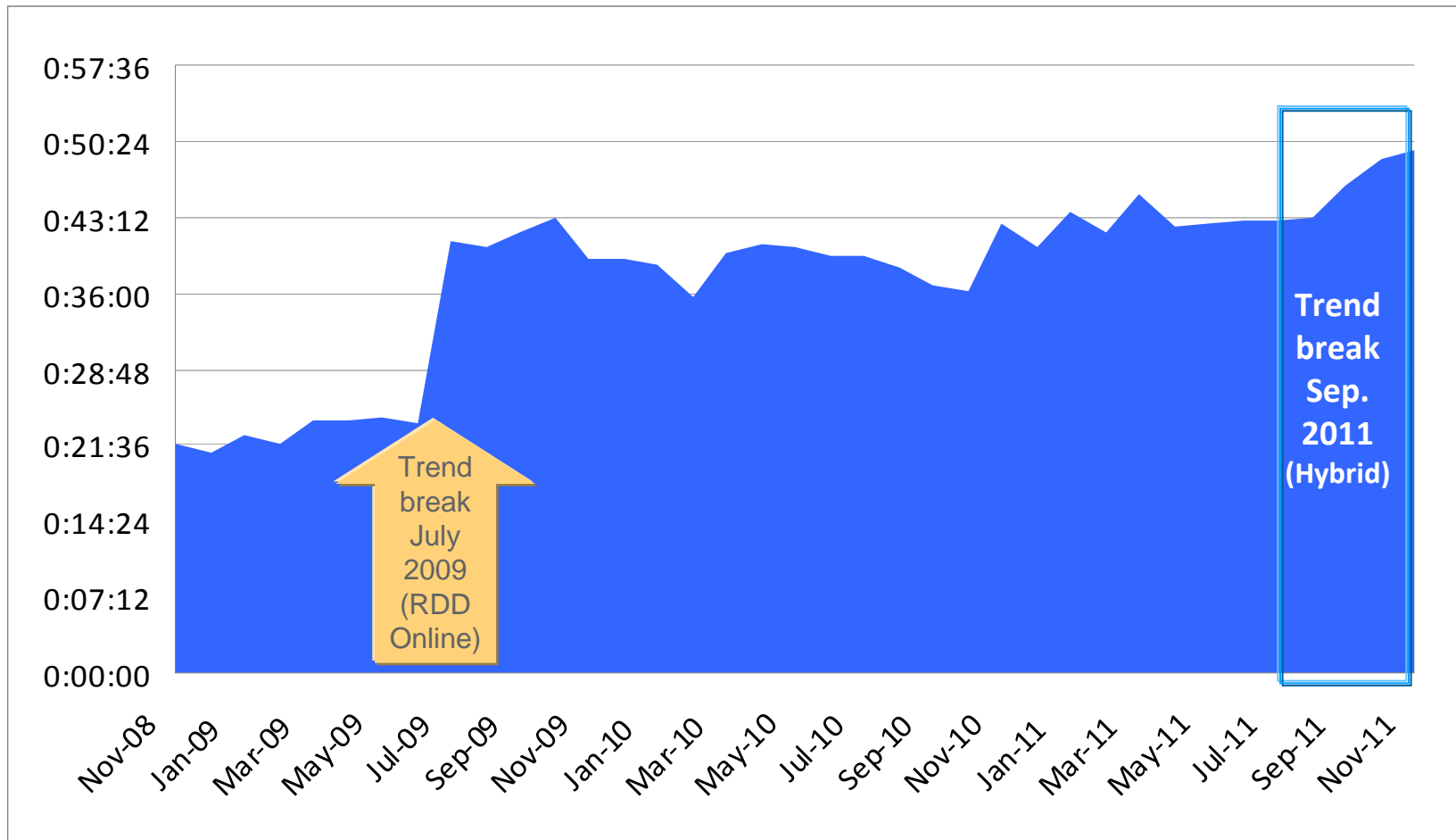
The age divide closely resembles the Australian population and leans heavily to the over 35s



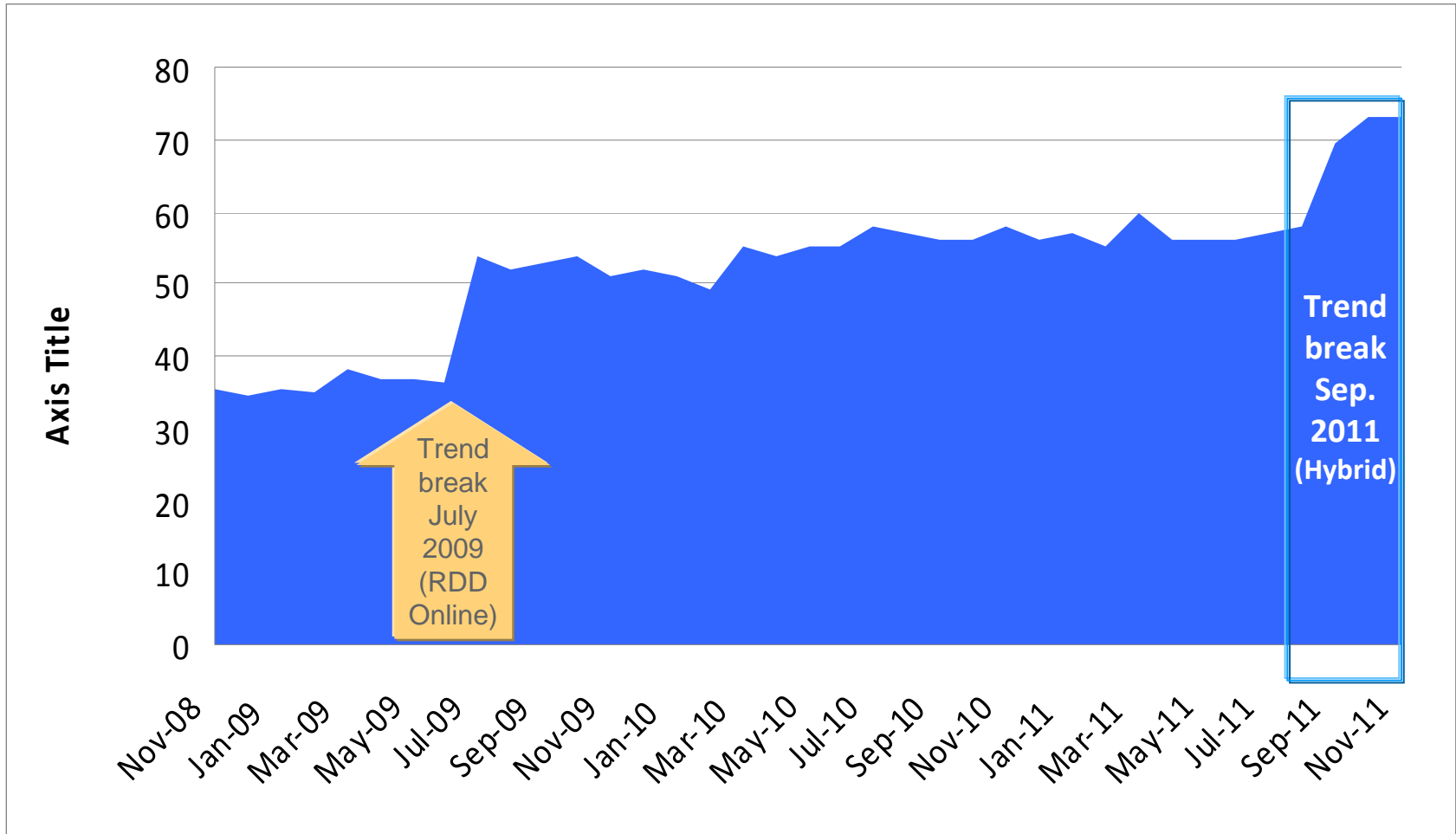
Online universe usage over time



PC time per person (excluding apps)



Visits per person



Seasonal trends - retail

“As we head in to the holiday period many retail sites have seen strong uplift in audience and activity ”

39%
Uplift in
audience



115%
Uplift in
total
sessions



71%
Uplift in
total
minutes



49%
Uplift in
total
sessions



“Based on previous years, we will expect another month on month uplift for online retail sites in December ”

Top Brands Unique Audiences in November



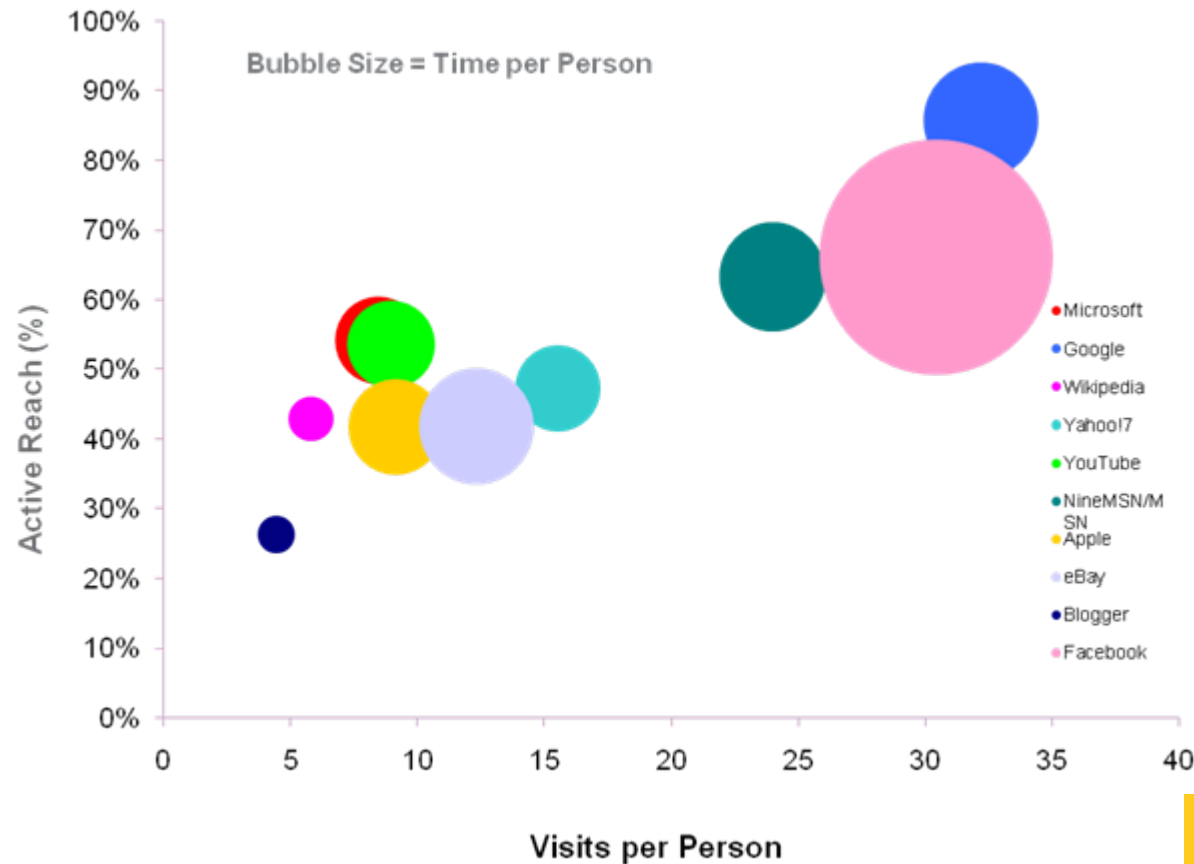
“The Top 10 brands rankings were generally stable, with the only change being Microsoft overtaking YouTube”

Brands	Rank Nov 2011	Unique Audience (000) Nov 2011	Rank Oct 2011	Unique Audience (000) Oct 2011	% Change M-on-M
Google	1	14,053	1	14,114	0%
Facebook	2	10,829	2	11,203	-3%
NineMSN/MSN	3	10,372	3	10,894	-5%
Microsoft	4	8,878	5	8,837	0%
YouTube	5	8,772	4	8,947	-2%
Yahoo!7	6	7,747	6	8,125	-5%
Wikipedia	7	7,026	7	7,193	-2%
eBay	8	6,851	8	6,980	-2%
Apple	9	6,848	9	6,879	0%
Blogger	10	4,314	10	4,550	-5%

“Seven of the top 10 Brands saw some decline due to a smaller active universe in November ”

The Top 10 Brands – stickiness*

“One in every four minutes that Australians spent on the Web in November was spent on Facebook”



Top 10 brands	Visits Per Person	Active Reach	Time Per Person
Google	32.17	86%	1:54:30
Facebook	30.43	66%	7:49:41
NineMSN/MSN	23.98	63%	1:40:01
Microsoft	8.45	54%	1:04:21
YouTube	8.96	54%	1:05:58
Yahoo!7	15.52	47%	1:04:14
Wikipedia	5.79	43%	0:17:33
eBay	12.32	42%	1:56:16
Apple	9.12	42%	1:18:03
Blogger	4.42	26%	0:12:07

*Stickiness is a custom visualization derived from reach, time and visits – not a standalone metric

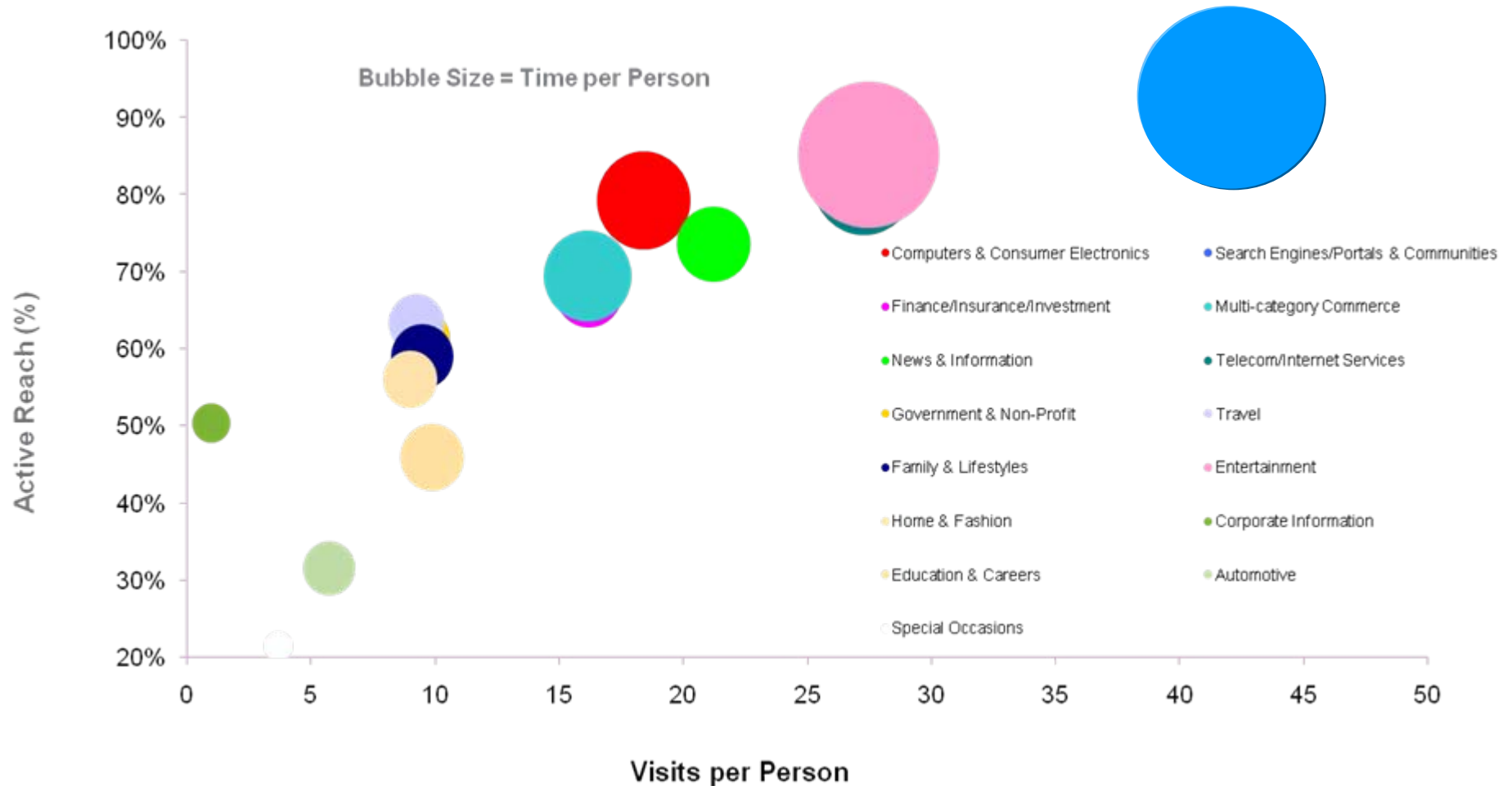
Major categories snapshot for November

Consumers spent a total 7 billion minutes in November by consumers on Search engines/Portals and Communities

Major Categories	Unique Audience (000)	Active Reach (%)	Total Sessions (000)	Sessions Per Person	Total Minutes (000)	Time Per Person (hh:mm:ss)	Total Page Views (000)
Search Engines/Portals & Communities	15,444	93.01	644,293	41.72	7,049,661	7:36:29	14,327,556
Entertainment	14,148	85.21	388,518	27.46	4,548,357	5:21:29	7,660,414
Telecom/Internet Services	13,534	81.51	369,224	27.28	2,204,635	2:42:54	2,788,682
Computers & Consumer Electronics	13,164	79.28	242,316	18.41	1,881,111	2:22:54	951,875
News & Information	12,213	73.55	259,152	21.22	1,052,001	1:26:08	1,455,901
Multi-category Commerce	11,531	69.45	186,243	16.15	1,406,327	2:01:58	3,044,195
Finance/Insurance/Investment	11,166	67.25	180,914	16.2	800,547	1:11:42	1,807,340
Travel	10,515	63.33	97,350	9.26	529,375	0:50:21	912,702
Government & Non-Profit	10,209	61.48	97,634	9.56	434,470	0:42:33	818,036
Family & Lifestyles	9,806	59.05	93,041	9.49	599,284	1:01:07	1,107,159
Home & Fashion	9,314	56.09	83,867	9	456,741	0:49:02	879,396
Corporate Information	8,360	50.35	54,825	6.56	196,705	0:23:32	392,585
Education & Careers	7,627	45.93	75,465	9.89	505,043	1:06:13	975,783
Automotive	5,224	31.46	29,965	5.74	227,819	0:43:36	466,206
Special Occasions	3,552	21.39	13,121	3.69	49,688	0:13:59	99,142

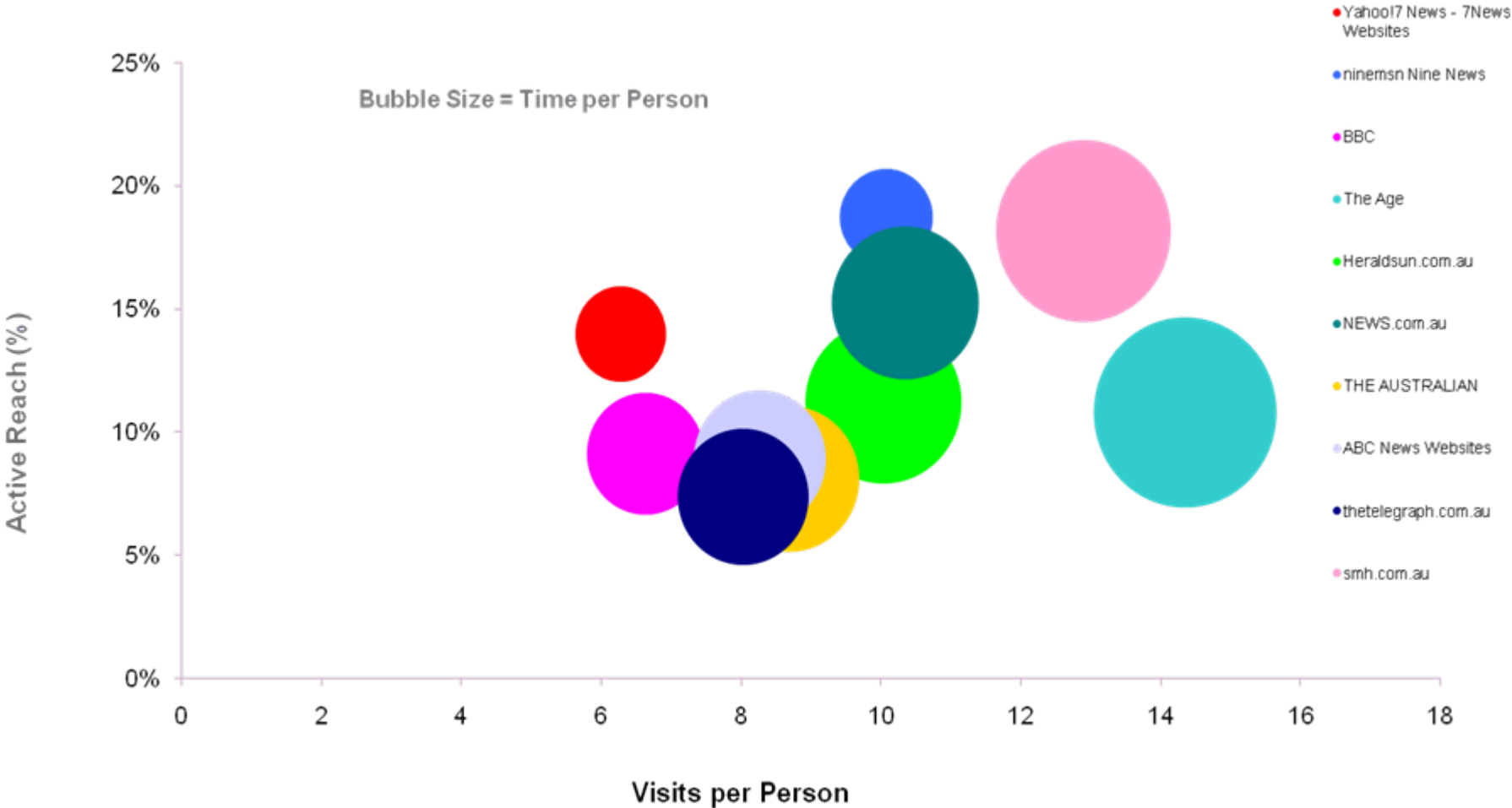
Categories – by stickiness

“Search and Social Media dominates the Australian Internet landscape”



Current Events & Global News – stickiness

“ninemsn Nine News leads the category in reach although smh.com.au has higher visits per person and time per person”



Mobile Insights across Australia & the USA



Internet browsing via mobile is booming



MOBILE

Mobile Market Aggregate; Average Daily Unique Browsers



Source Nielsen Online Ratings (Mobile Market Intelligence – November 2011)

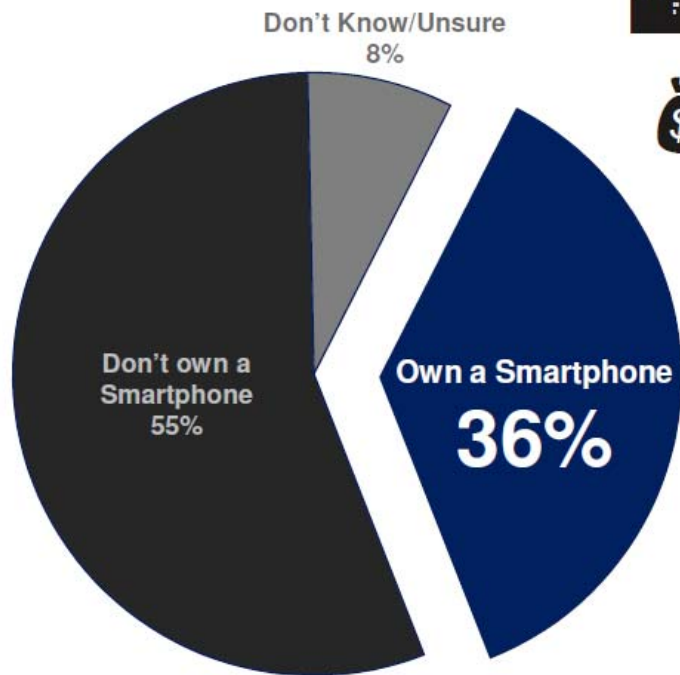
The smartphone population in Australia



MOBILE

SMARTPHONE OWNER
(BASE: MOBILE PHONE POPULATION)

Smartphone Ownership



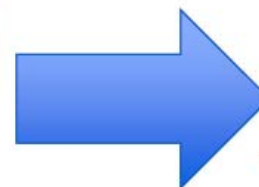
Males have a higher penetration of Smartphone ownership than females (43% vs 31%)



Higher penetration in **Metro** areas (42% vs 28% in non-metro areas)



Those with a personal income in excess of **\$95k+** have the highest penetration (59%) following by those earning \$50-95k (44%) ... those earning under \$50K personal income report the lowest ownership (29%)



+17%
Purchase Intent N12M/growth*
2011 = 54%

**based in those who intend to purchase a Smartphone N12M, who don't currently own a Smartphone*



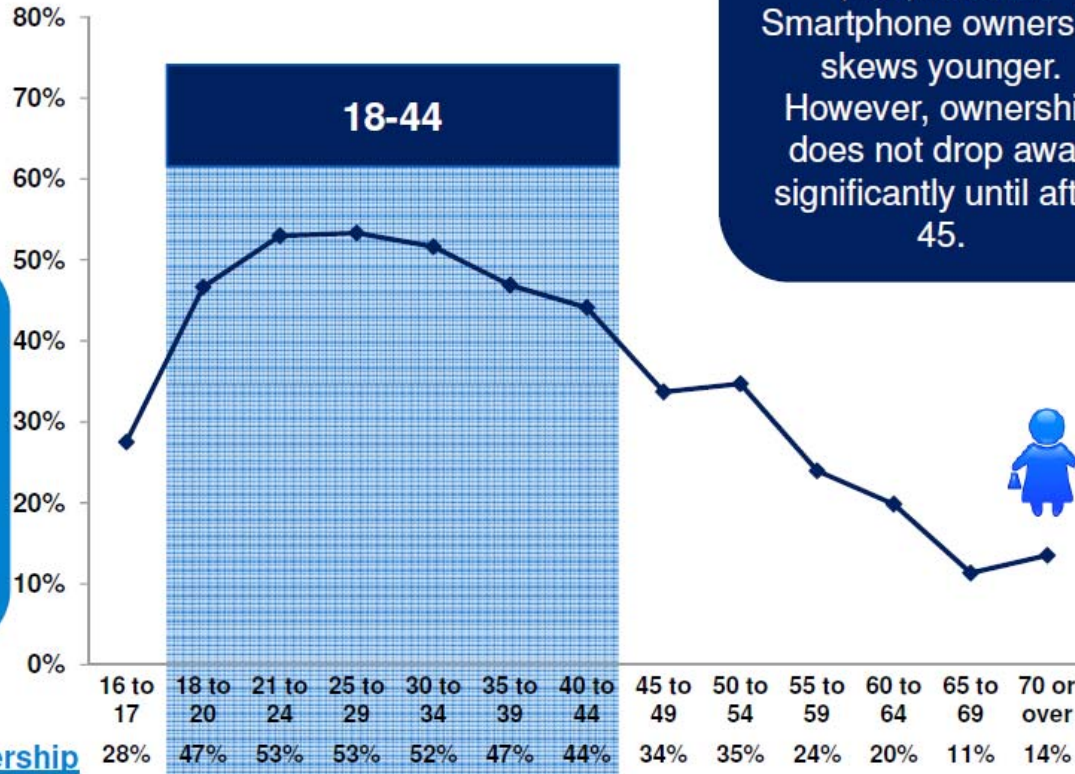
Q. Is your phone a 'smartphone'? Base: Smartphone Mobile Phone Population. Sample: 2,859.



What is the average age of a smartphone owner?

SMARTPHONE OWNERSHIP – BY AGE

Although skewing younger... it is not only a young persons' market. 1-in-5 (22%) of Smartphone users are over 50, and 41% are over 40.



The average age of a Smartphone owner (16+) is 39.... Smartphone ownership skews younger. However, ownership does not drop away significantly until after 45.



Smartphone Ownership

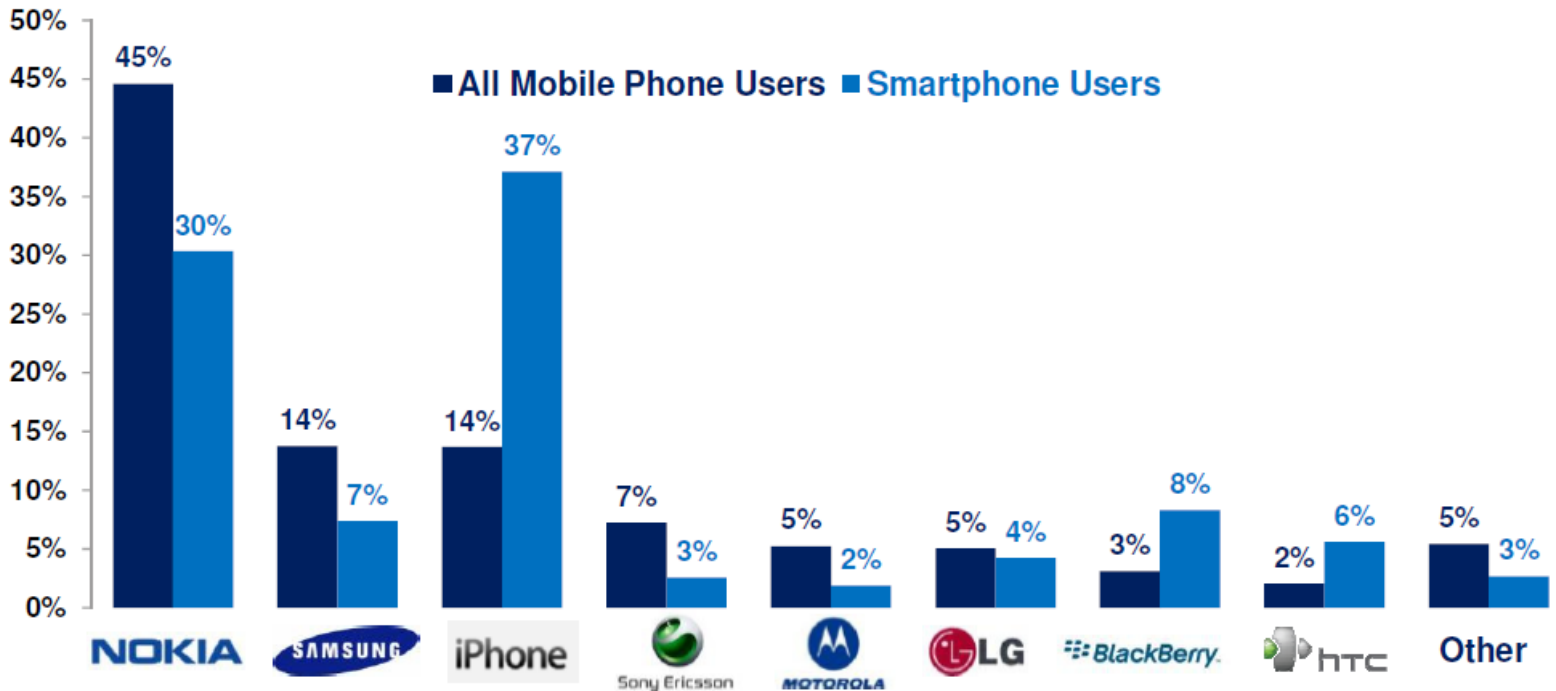


Is your phone a 'smartphone'?
 Base: Mobile Phone Users. Sample: 16 to 17=40; 18 to 20=75; 21 to 24=185; 25 to 29=302; 30 to 34=368; 35 to 39=322; 40 to 44=315; 45 to 49=264; 50 to 54=219; 55 to 59=263; 60 to 64=242; 65 to 69=150; 70 or over=111.



Brand owned - most recently acquired Mobile Phone

Nokia dominates the mobile phone market as a whole more than triple the share of nearest competitors, Apple and Samsung.
 However, Apple dominates the *Smartphone* market, with 37% share.



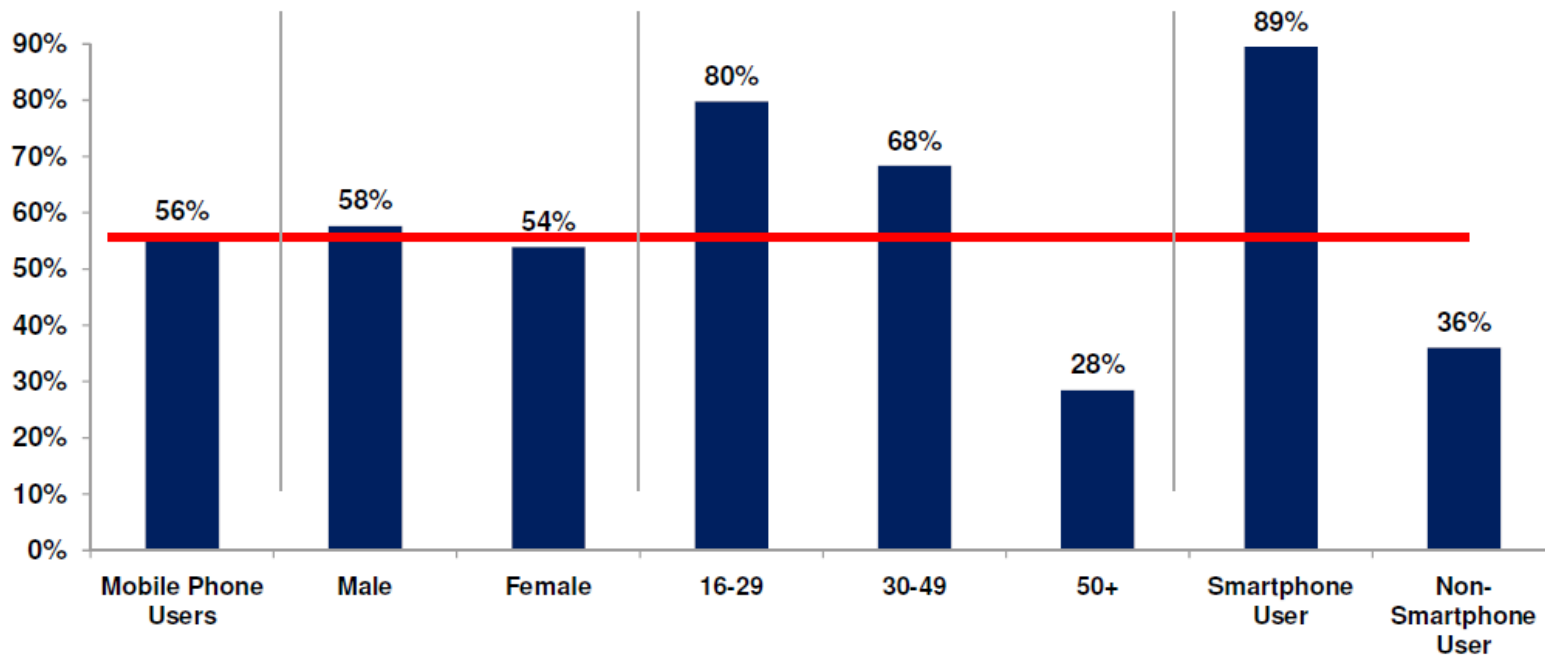
Q. Which brand or make is it? Base: Mobile Phone Users.
 Sample: Total Sample=2,859; Smartphone Users=1,094..



Mobile Internet usage in Australia

More than half of the Mobile Phone Population have used Mobile Internet

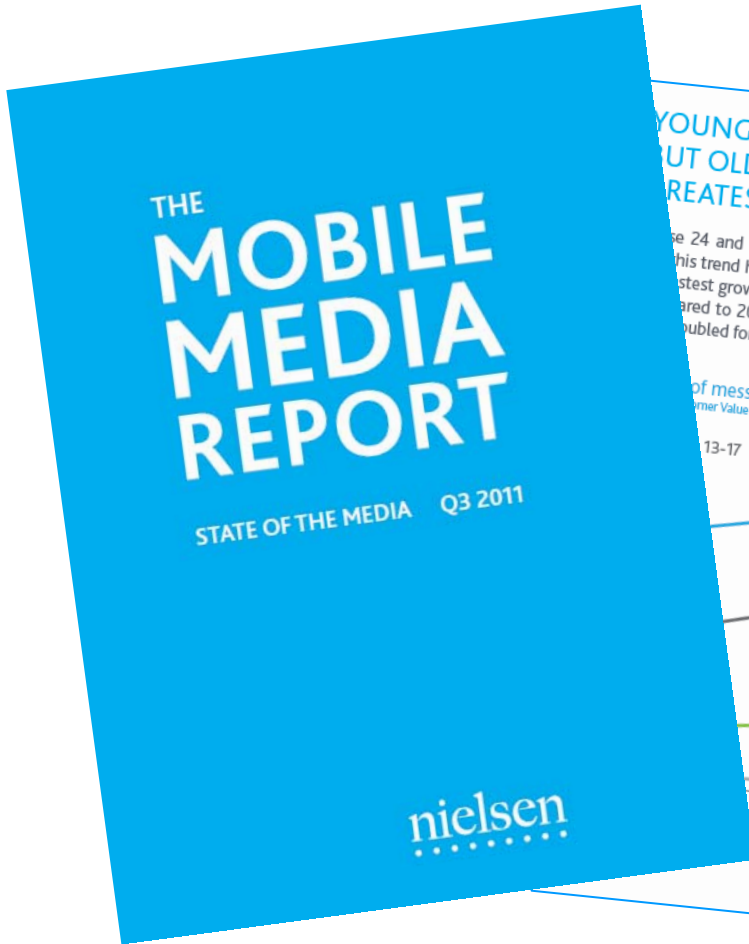
Ever Used Mobile Internet



Q. Have you EVER accessed the Internet on your mobile phone in any way, whether via accessing a site through an Internet browser or via an application that automatically connects you to the Internet? (This includes any activity that requires you to access the internet - such as email) Base: Mobile Phone Users. Sample: Total Sample=2859; Male=1415; Female=1444; 16-29=602; 30-49=1269; 50+=985; Smartphone User=1094; Non-Smartphone User=1534;

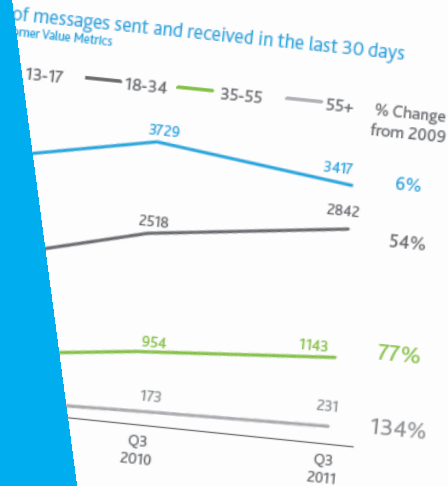


The Nielsen Mobile Media report - USA

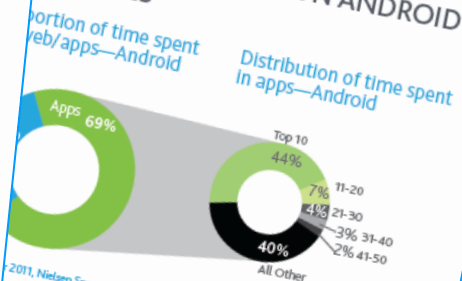


YOUNGER GROUPS MESSAGE THE MOST, BUT OLDER SEGMENTS SHOW THE GREATEST GROWTH

Those 24 and under send and receive the greatest volume of messages, and this trend has remained consistent over time. However, older folks are the fastest growing segment and have shown consistent growth overtime. Compared to 2009, the number of messages sent and received has more than doubled for those 55+.



TOP 50 APPS ACCOUNT FOR THE MAJORITY OF TIME SPENT ON ANDROID SMARTPHONES



2011, Nielsen Smartphone Analytics, Device Metering Data

The 69 percent of the time spent on applications, users spend 53 percent acting within those in the top 50.

The top 50 apps are always changing



App developers shouldn't be discouraged, the top 50 apps are always changing. In fact, 1/5th were new to the top 50 list in September.

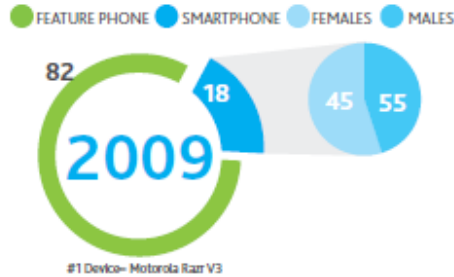
Insights into the US Mobile Media Market

Focused primarily on the US market, with a snapshot of mobile trends around the world

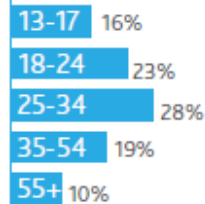
SMARTPHONE OWNERSHIP HAS MORE THAN DOUBLED IN TWO YEARS

Two years ago, only 18 percent of mobile subscribers had smartphones and these smartphone audiences were more likely to be male.

Smartphone penetration 2009
Q3 2009, U.S. Mobile Insights, National



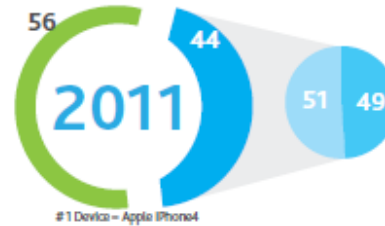
PENETRATION BY AGE



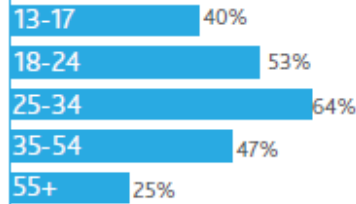
Those 25-34 and 18-24 have always been the leading age groups in smartphone penetration

Today, nearly half of mobile subscribers in the U.S. own a smartphone device and 51 percent of them are female.

Smartphone penetration 2011
Aug - Oct, 2011, U.S. Mobile Insights, National



PENETRATION BY AGE

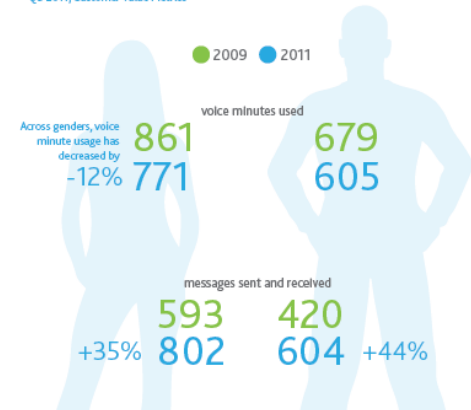


AS DEVICE CAPABILITIES EVOLVE, SO DO THE WAYS IN WHICH PEOPLE INTERACT THROUGH THEIR PHONES

According to Nielsen's quarterly panel of more than 65,000 post-paid mobile phone subscribers, 81 percent of today's mobile phone users have sent or received messages in the last 30 days. In 2009, that figure was 75 percent. Actual usage data is gathered from post-paid mobile phone subscribers and represent a monthly average of voice minutes used or messages sent and received.

Women are heavier mobile phone users than men when it comes to voice usage and messages, and this has remained consistent overtime.

Voice minute and message usage by gender
Q3 2011, Customer Value Metrics



Download your copy of this detailed Nielsen Mobile Media Report at:

<http://nielsen.com/us/en/insights/reports-downloads/2011/state-of-the-media--mobile-media-report-q3-2011.html>

Media Enquiries

For further details, please contact:

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The Nielsen logo is contained within a white circular shape. It features the word "nielsen" in a lowercase, blue, sans-serif font. Below the text, there are seven small, dark grey dots arranged in a horizontal line.

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