



nielsen

MAKING THE MOST OF MOBILE

MOBILE INSIGHTS FOR ADVERTISERS, AGENCIES AND PUBLISHERS

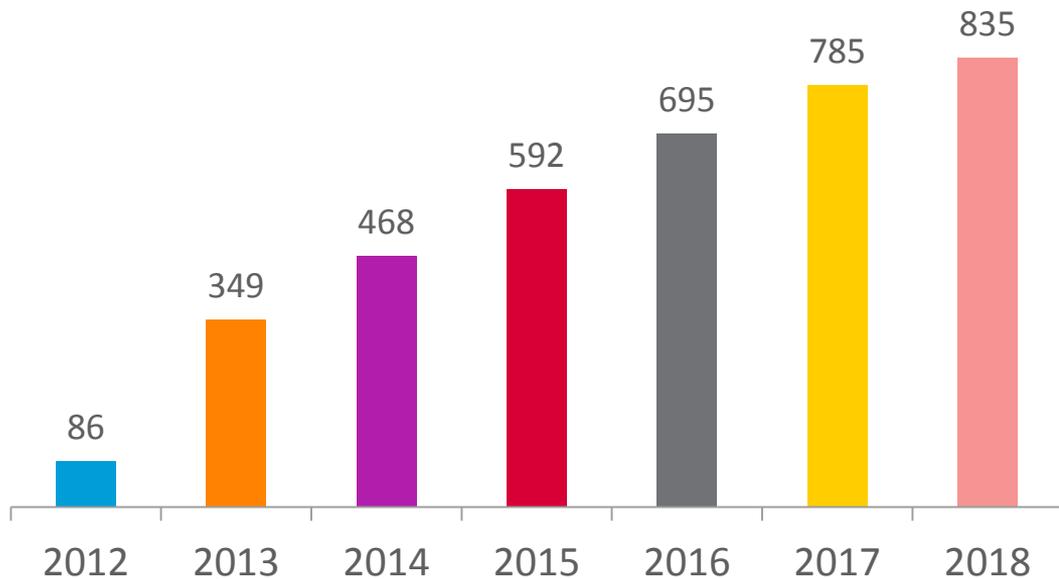


Gai LeRoy
Director of Research, IAB Australia



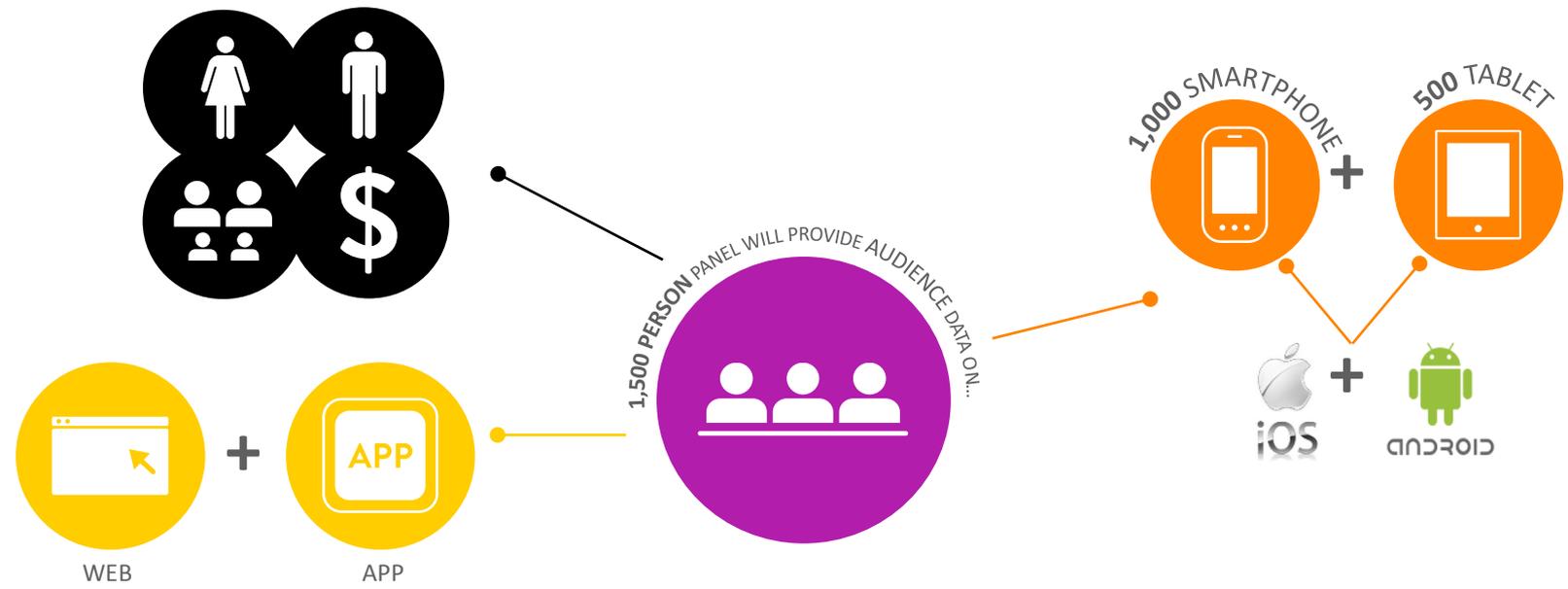
Alex Smith
Regional Product Lead – Mobile, Nielsen

\$ (m)



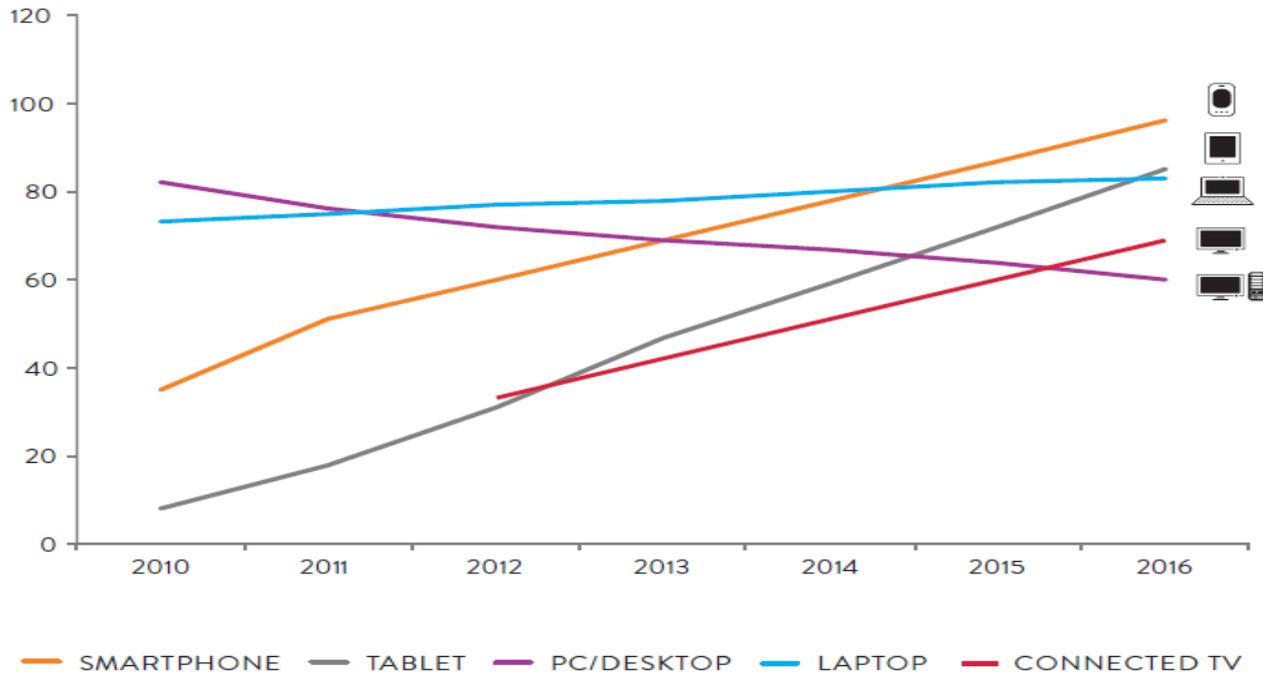
MOBILE ACCOUNTS
FOR **15%** OF TOTAL
DIGITAL AD SPEND
AND **21%** OF
DIGITAL DISPLAY
MARKET

AGE, GENDER, INCOME DEMOGRAPHICS



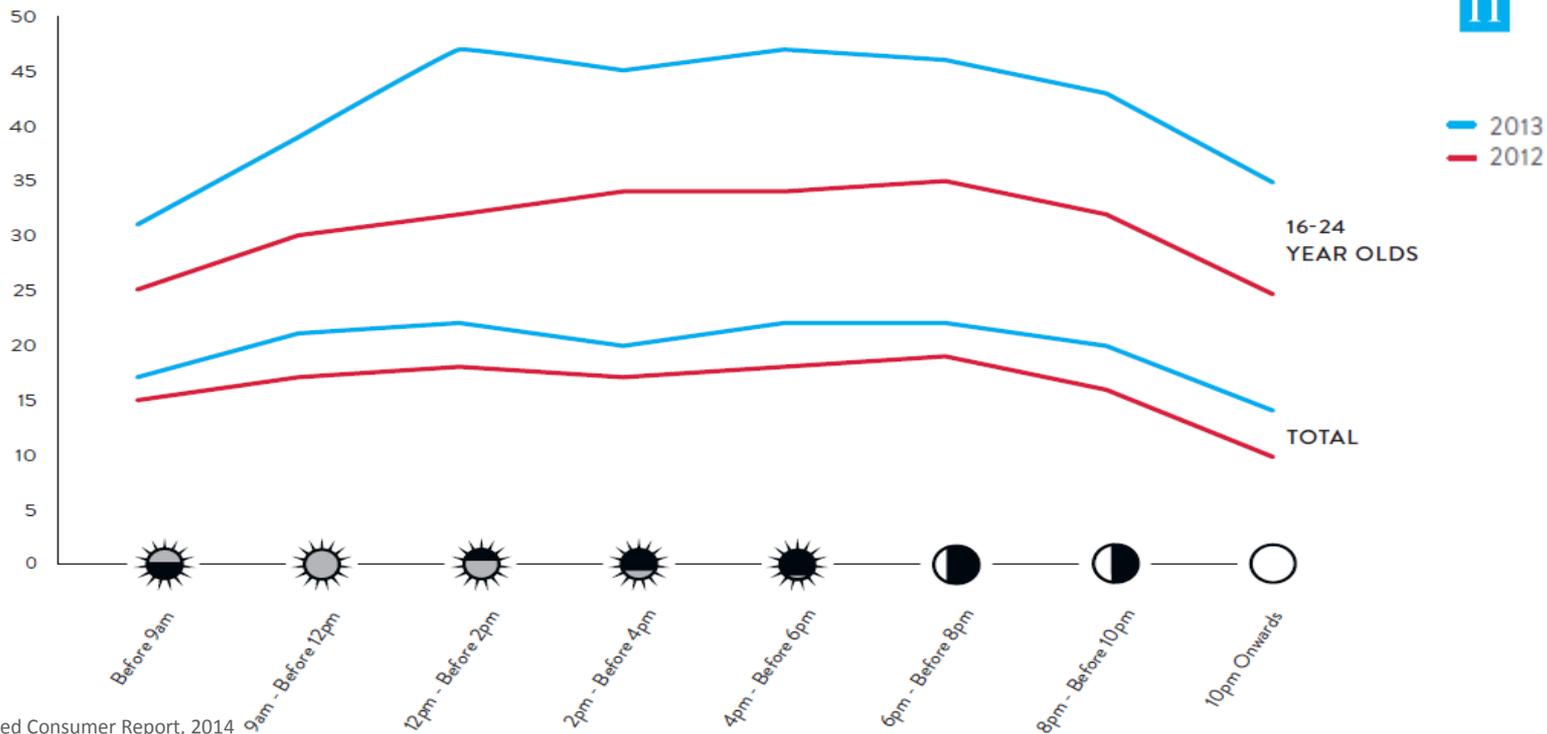
THE IAB / NIELSEN MOBILE PILOT IS THE LARGEST DIGITAL MEASUREMENT INVESTMENT BY THE INDUSTRY TO DATE

MOBILE DEVICE OWNERSHIP WILL OVERTAKE COMPUTERS BY 2016





% ACCESSING
INTERNET VIA
MOBILE PHONE



Source: Nielsen Australian Connected Consumer Report, 2014

MOBILE PHONES HAVE THE MOST STEADY USE
THROUGHOUT THE DAY

MOBILE DEVICES GENERATE SIGNIFICANT ENGAGEMENT

TOTAL SCREEN TIME:

TV 57%
MOBILE 22%
DESKTOP 21%

TOTAL DIGITAL SCREEN TIME:

DESKTOP 48.2%
SMARTPHONE 32.4%
TABLET 19.4%

TIME PER MONTH

93 HOURS
WATCHING
BROADCAST TV



95%

38 HOURS
USING THE
INTERNET ON A
COMPUTER



83%

29 HOURS
USING
INTERNET /
APPS ON A
SMARTPHONE



73%

24 HOURS
USING
INTERNET /
APPS ON A
TABLET



53%

MARKET PENETRATION

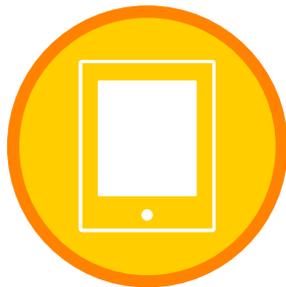
APPS GENERATE THE HIGHEST ENGAGEMENT – PARTICULARLY ON SMARTPHONES



[04:07]



[25:46]



[04:42]



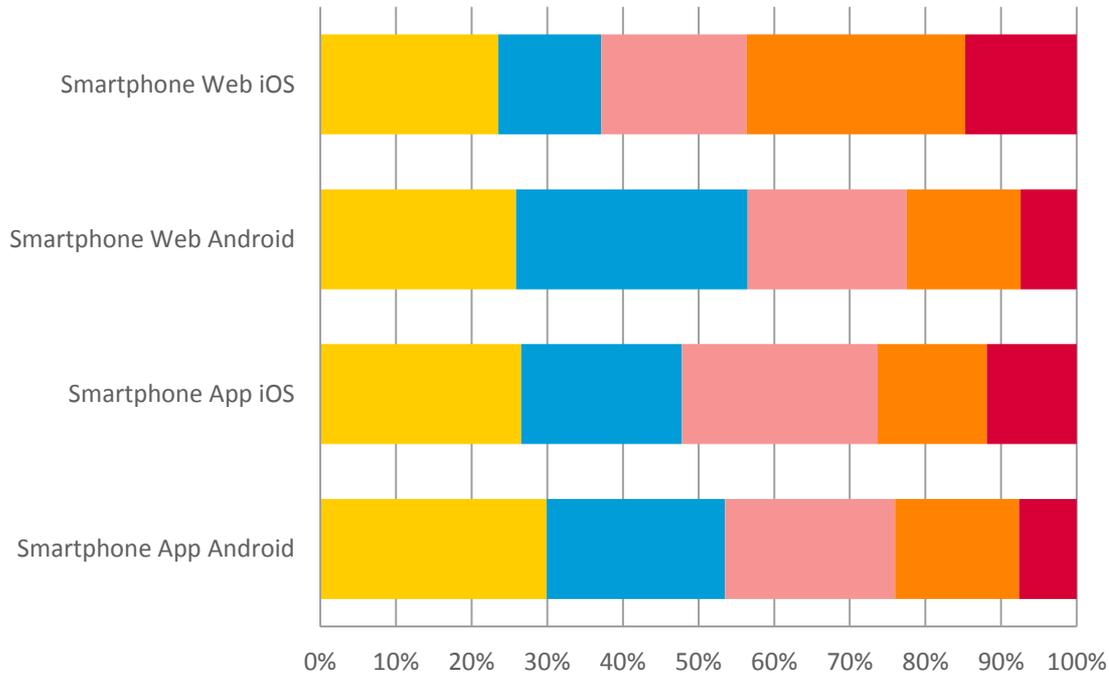
[20:30]

Time per Person in [HH:MM]



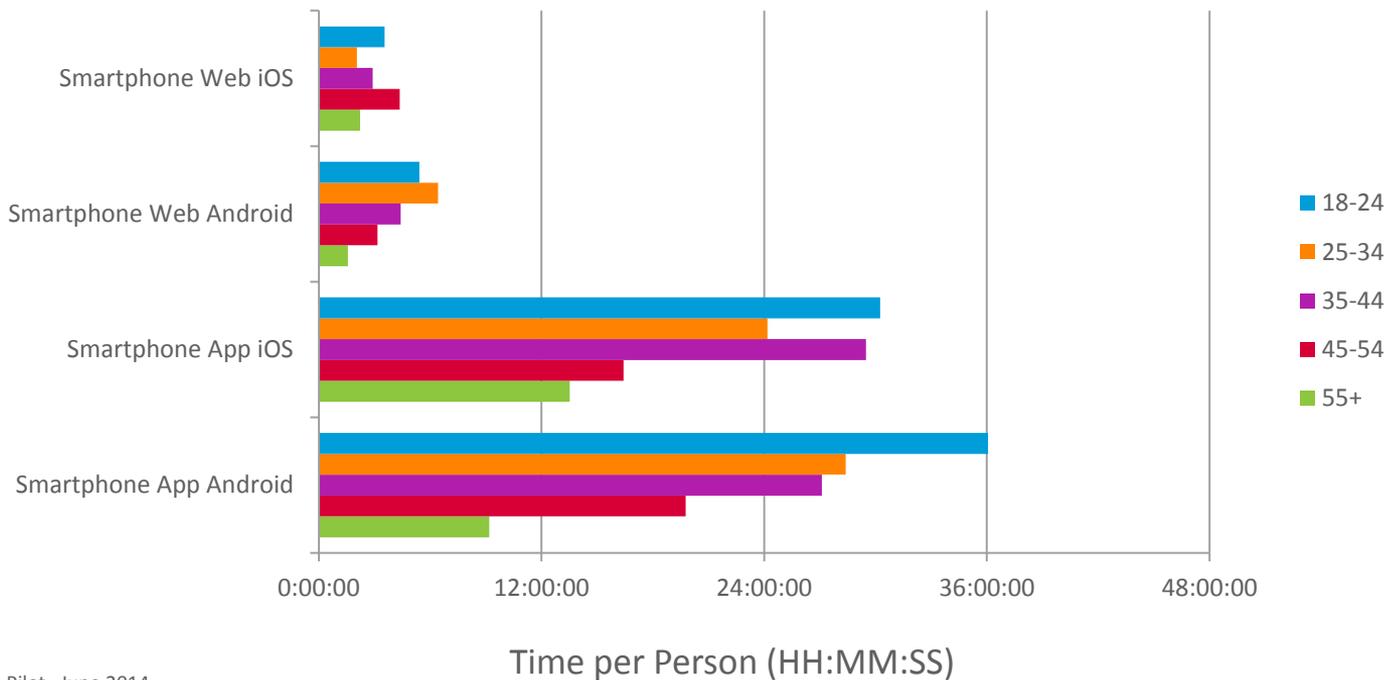
Total Time by Age

■ 18-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55+



TOTAL TIME SPENT BY
AGE IS SIMILAR
ACROSS BOTH
ANDROID AND iOS

YOUNGER AGE GROUPS SPEND THE MOST TIME PER PERSON, PARTICULARLY ON APPS



SOCIAL

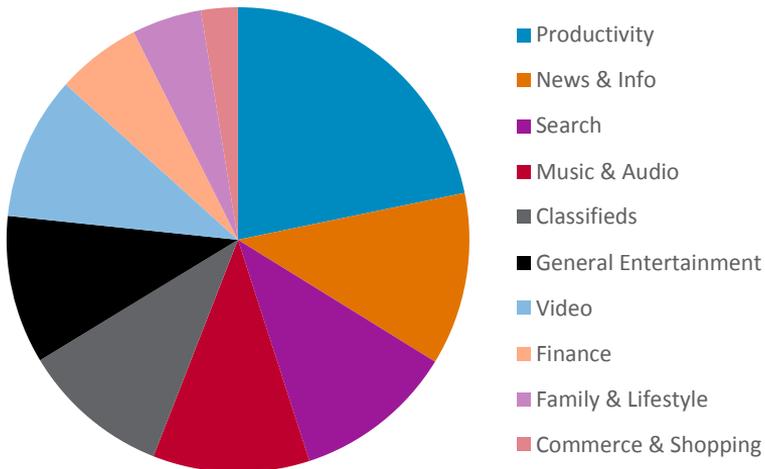


+

GAMING

75% of
Total Time

And this is the other 25%...



SOCIAL & GAMING
ARE DOMINANT
GENRES FOR
SMARTPHONE APPS

SOCIAL

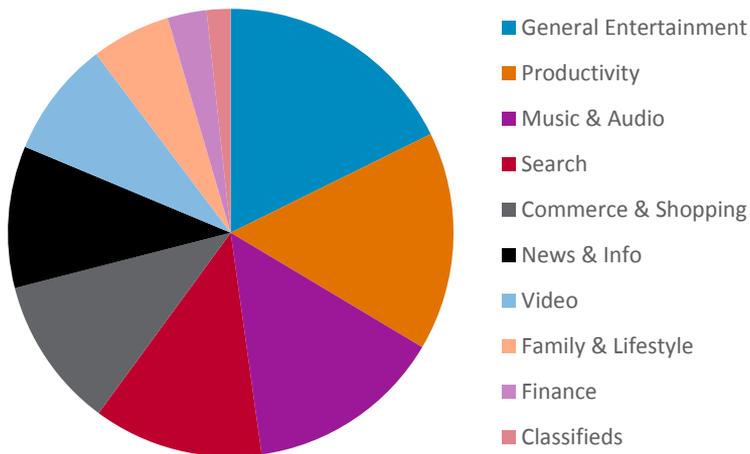


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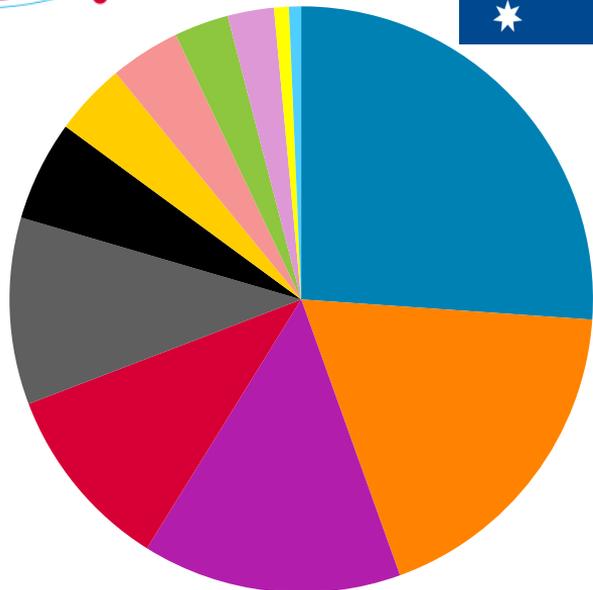
GAMING

55% of
Total Time

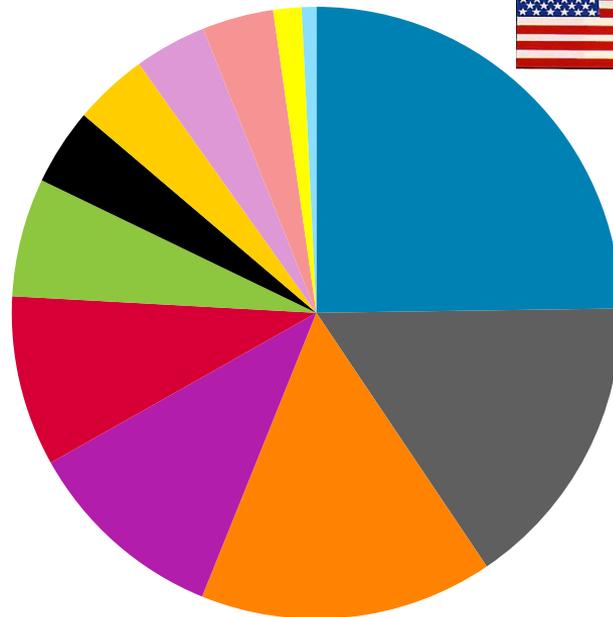
And this is the other 45%...



SOCIAL & GAMING
ARE DOMINANT
GENRES FOR
SMARTPHONE /
TABLET APPS



- Social Networking
- Search (Channel level)
- News & Info
- Commerce & Shopping
- General Entertainment
- Classifieds
- Productivity
- Finance
- Family & Lifestyle
- Video
- Gaming
- Music & Audio



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Source: IAB / Nielsen Mobile Pilot, June 2014; Nielsen Mobile NetView USA, June 2014

SMARTPHONE WEB USAGE IS MORE FRAGMENTED AND EXPLORATORY BEYOND SOCIAL

TOP 10 SMARTPHONE APPS BY ACTIVE REACH

Rank	App AU	Rank	App US
1	 Facebook	1	 Facebook
2	 Google Search	2	 Google Search
3	 Google Play	3	 Google Play
4	 Google Maps	4	 Google Maps
5	 Gmail	5	 Gmail
6	 Facebook Messenger	6	 YouTube
7	 YouTube	7	 Google+
8	 eBay Mobile	8	 Facebook Messenger
9	 Music (iTunes Radio/iCloud)	9	 Instagram
10	 Google+	10	 Music (iTunes Radio/iCloud)

TOP 10 SMARTPHONE WEB BY ACTIVE REACH

BRAND AU	BRAND US
Google	Google
Facebook	Facebook
Yahoo	Yahoo
MSN/WindowsLive/Bing	Amazon
Twitter.com	Twitter.com
Wikipedia	Wikipedia
Amazon	YouTube
YouTube	MSN/WindowsLive/Bing
eBay	AOL Media Network
Telstra Media	eBay

TOP 10 TABLET APPS BY ACTIVE REACH

Rank	App US (iPad Only)
1	 Facebook
2	 Music (iTunes Radio/iCloud)
3	 YouTube
4	 Maps(Apple)
5	 Chrome
6	 Twitter
7	 Pinterest
8	 Netflix
9	 Google Search
10	 Kindle



nielsen

AN UNCOMMON SENSE
OF THE CONSUMER™

