



nielsen

THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

JANUARY 2015

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STATE OF THE ONLINE LANDSCAPE

January 2015

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

The online landscape in January saw Australians spend 36 hours online over 62 sessions; with 39 billion minutes spent online with 28 billion pages viewed. Compared to December, the average consumer spent 1.5 more hours browsing and 1 extra session as the new year commenced.

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

- Travel with a specific focus on **multi-category travel**.

Also, please note the updates for this month:

- Nielsen Online Ratings – Monthly Update Report
- Online Campaign Ratings Interface
- Child's Play: Connected Aussie Kids Spend Up To Equivalent Of Three School Days Online Every Week

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.



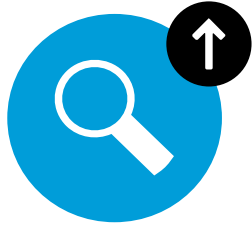
An abstract graphic on the left side of the slide. It features a portion of a sphere or dome with a grid of colorful lines (red, green, blue, yellow) curving across its surface. Several colored dots (yellow, pink, red) are placed on the grid, with thin lines extending from them towards the right, suggesting data points or connections.

HIGHLIGHTS

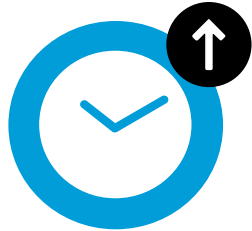
NIELSEN ONLINE RATINGS: HYBRID

AT A GLANCE: THE ONLINE LANDSCAPE

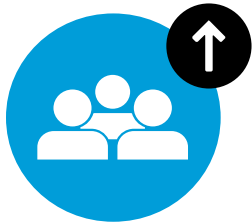
January 2015



28 billion viewed pages.



39 billion minutes spent.



36 hours spent online, across **62 sessions** per person.



18,011,000 people were actively surfing online.



Indicates growth or decline based on the previous month

TOP 10 BRANDS AND THEIR ENGAGEMENT

January 2015

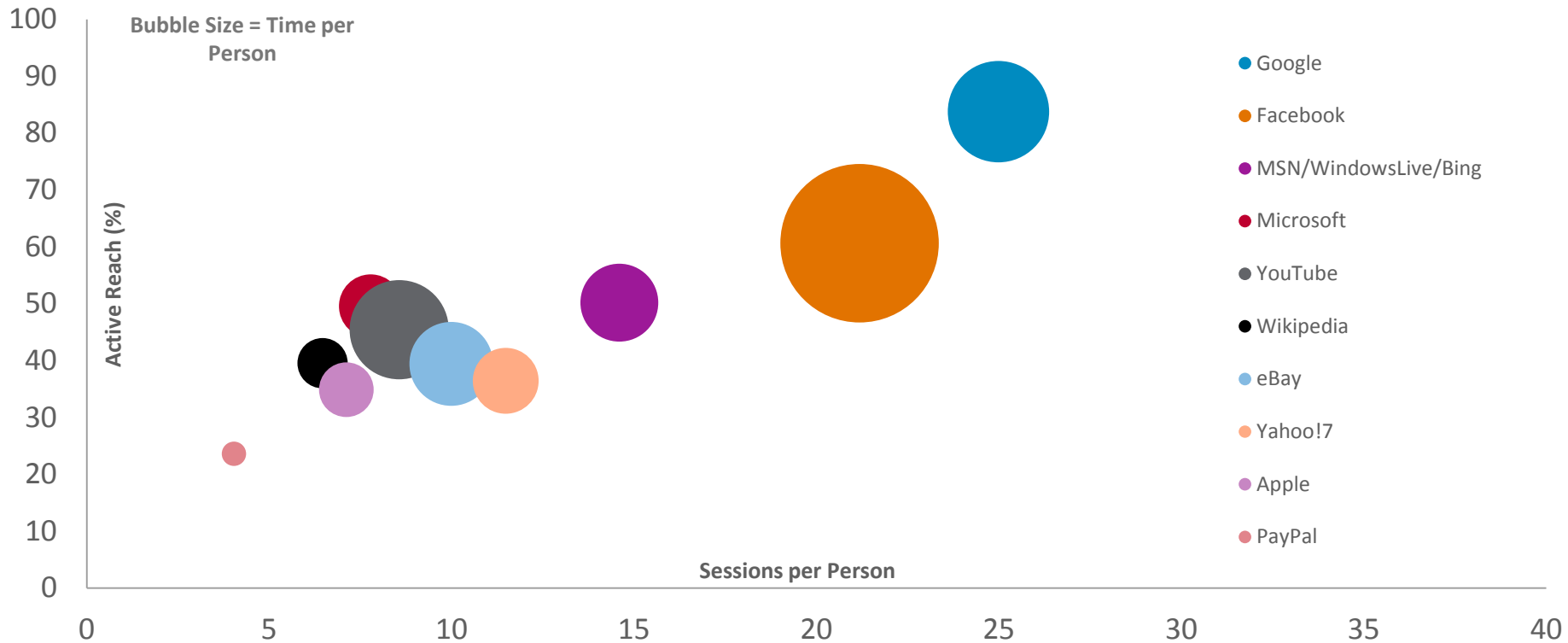
Unique Audience Rank	Brands	Unique Audience (000s)	Page Views (000s)	Active Reach (%)	Sessions Per Person	Time Per Person (hh:mm:ss)
1	Google	15,087	3,261,116	83.76	24.99	03:08:44
2	Facebook	10,917	2,058,334	60.61	21.18	07:41:57
3	MSN/WindowsLive/ Bing	9,037	840,011	50.17	14.59	01:51:31
4	Microsoft	8,921	46,667	49.53	7.78	01:14:18
5	YouTube	8,178	517,139	45.40	8.56	03:00:13
6	Wikipedia	7,122	261,513	39.54	6.46	00:46:29
7	eBay	7,098	912,527	39.41	9.99	02:08:49
8	Yahoo!7	6,560	364,180	36.42	11.48	01:19:29
9	Apple	6,278	24,283	34.86	7.11	00:55:05
10	PayPal	4,248	84,533	23.58	4.03	00:10:48

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, January 2015

TOP 10 BRANDS AND THEIR ENGAGEMENT

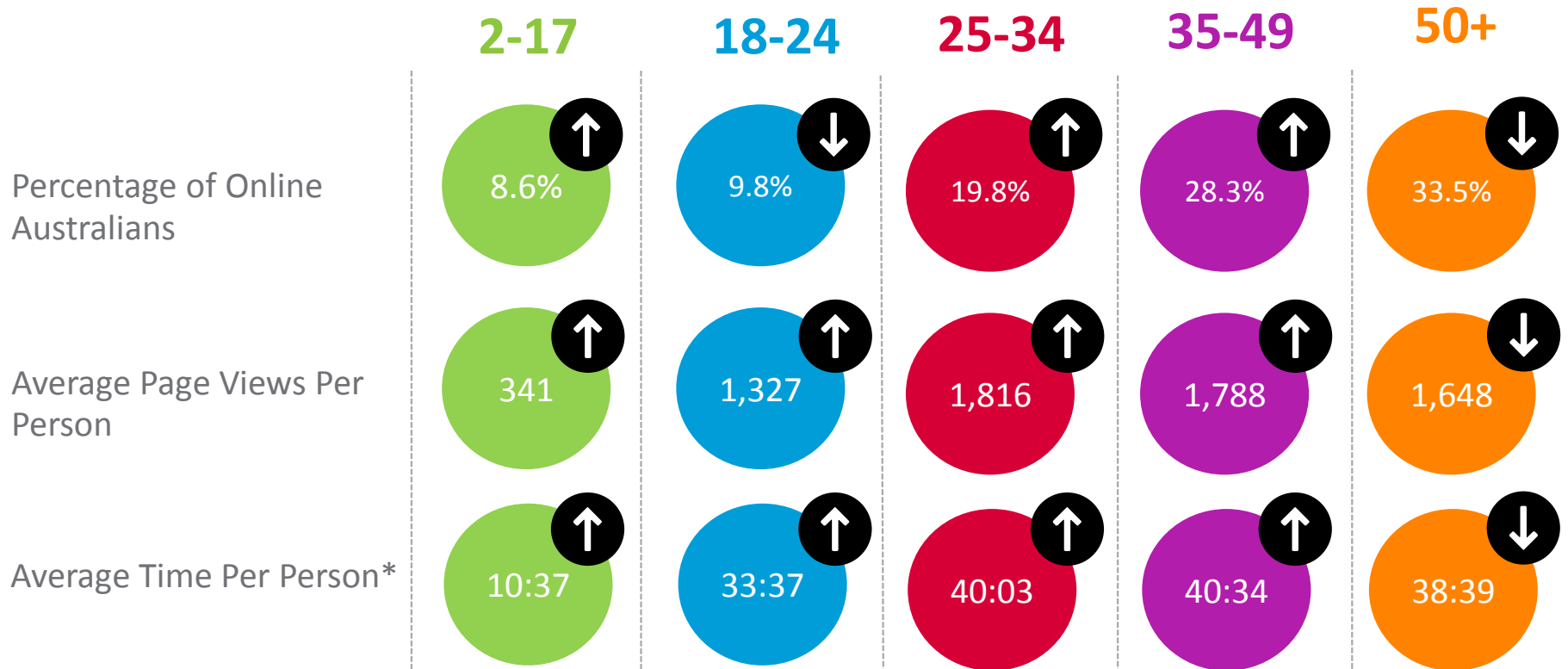
January 2015



6 of the top 10 sites experienced significant increases in engagement since December. This is exemplified by Wikipedia, eBay and YouTube with growth in time per person of 16%, 14% and 13% respectively. This spurt in browsing time correlates with the end of vacation period.

HYBRID SURFING: AGE DEMOGRAPHICS ONLINE

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



Accompanying the new year is growth in all age groups bar those 50+.

Notably, teens and young adults have displayed marked increases in time per person.

Those aged 2-17 browsed an extra 2 hours, whilst those aged 18-24 browsed an extra 4 hours on average.

↑ ↓ Indicates growth or decline based on the previous month

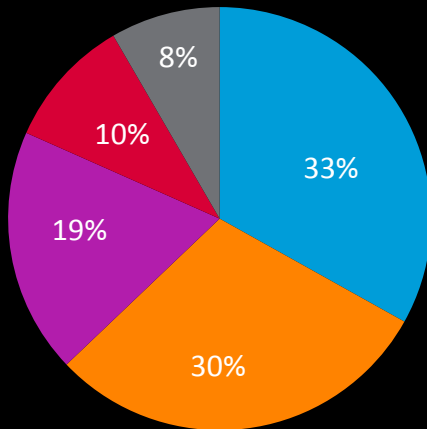
*HH:MM

GENDER BREAKDOWN – ACTIVE UNIVERSE



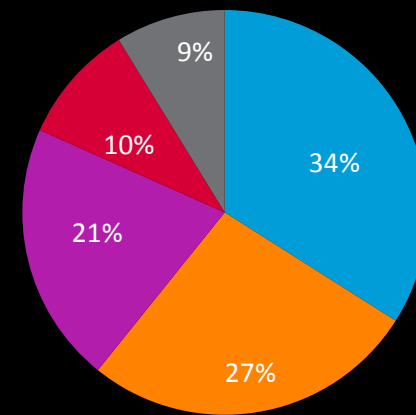
9,274,000 UA

- 50+
- 35-49
- 25-34
- 18-24
- 2-17



8,738,000 UA

- 50+
- 35-49
- 25-34
- 18-24
- 2-17



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 small, colored dots (yellow, pink, red) are placed on these lines, with thin lines extending from them towards the right, suggesting data points or connections.

HIGHLIGHTS

NIELSEN ONLINE RATINGS: HYBRID STREAMING

HYBRID STREAMING KEY ONLINE STATISTICS

January 2015



3.2 billion streams watched.



5.9 billion minutes streamed.



7 hours and 15 minutes spent streaming per person.



13,472,000 people were actively streaming online.

HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

January 2015

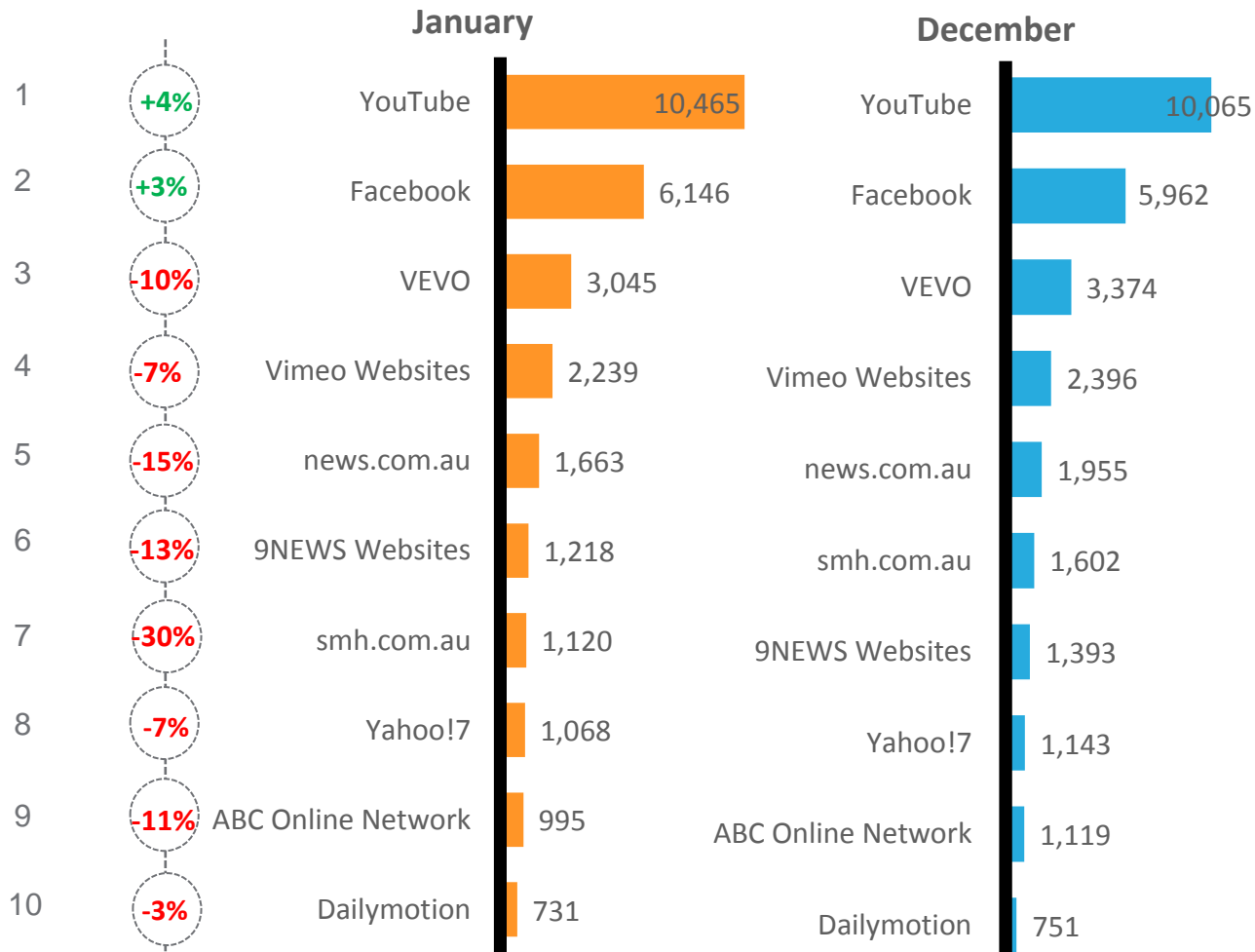
Unique Audience Rank	Brand	Unique Audience (000s)	Total Streams	Time Per Person (hh:mm:ss)
1	YouTube	10,465	1,647,909	04:51:53
2	Facebook	6,146	191,746	01:45:21
3	VEVO	3,045	98,148	00:40:47
4	Vimeo Websites	2,239	6,418	00:16:04
5	news.com.au	1,663	11,320	00:08:43
6	9NEWS Websites	1,218	13,531	00:09:41
7	smh.com.au	1,120	3,418	00:08:10
8	Yahoo!7	1,068	10,858	00:30:54
9	ABC Online Network	995	5,215	02:15:46
10	Dailymotion	731	41,016	01:34:38

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, January 2015

TOP BRANDS COMPARISON – HYBRID STREAMING

January 2015, Unique Audience (000)

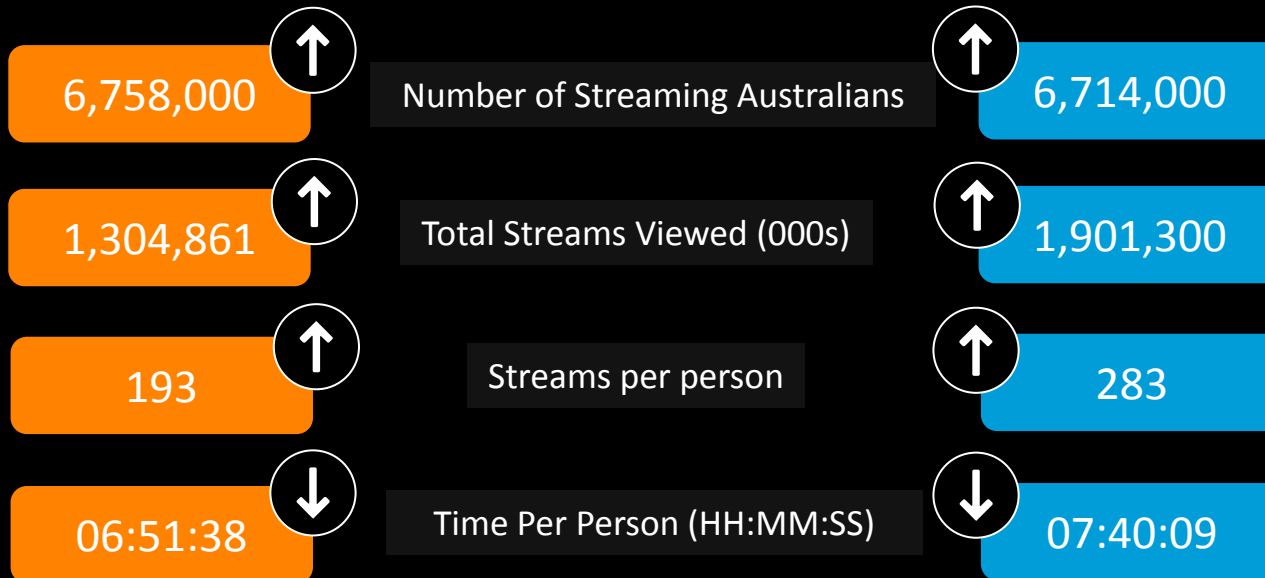


As the holiday season wound down, unique audience for the top 10 sites decreased, with notable falls experienced by news and current affairs sites.

This drop can be attributed to viewership normalising after the spike in news and current affairs in December.

While not ranking in the top 10, it is worth noting that SBS jumped in unique audience figures by 81%, pulling in 541,000 people this month.

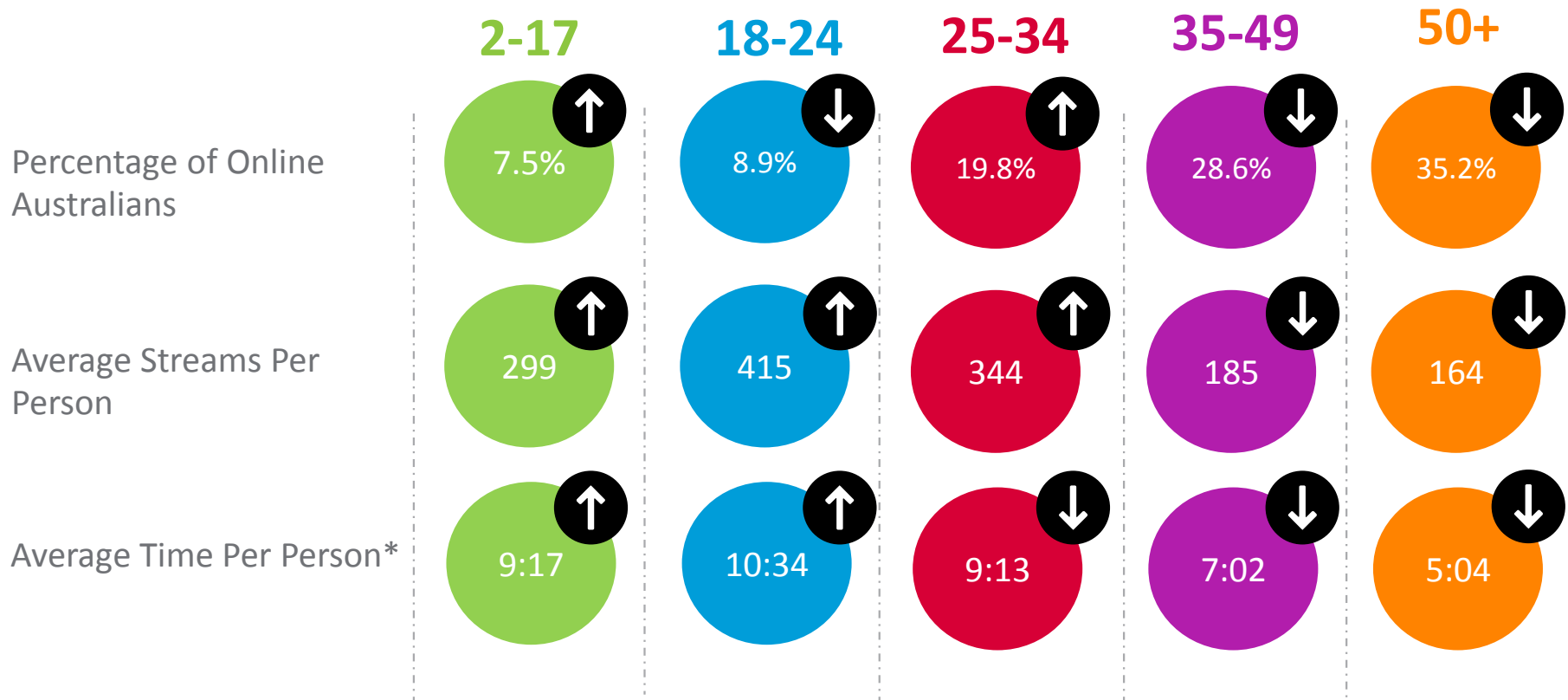
GENDER BREAKDOWN – HYBRID STREAMING



Australians streamed more video content this month compared to last month. Both genders reported increases with an additional 67 million streams for females and 118 million streams more for males. Despite growth in the amount of total streams viewed, Australians spent less time watching video content with the average male dropping 20 minutes of viewing time and the average female 50 minutes. This indicates that there may be more shorter videos being streamed.

HYBRID STREAMING: AGE DEMOGRAPHICS ONLINE

January 2015



Further illustrating the proliferation of streaming media, Australians aged 2 to 34 experienced a rise in average streams per person. Specifically, those aged 2-17 streamed 21% more than last month, with the 18-24 and 25-34 age groups both streaming 11% more.

↑ ↓ Indicates growth or decline based on the previous month

*HH:MM

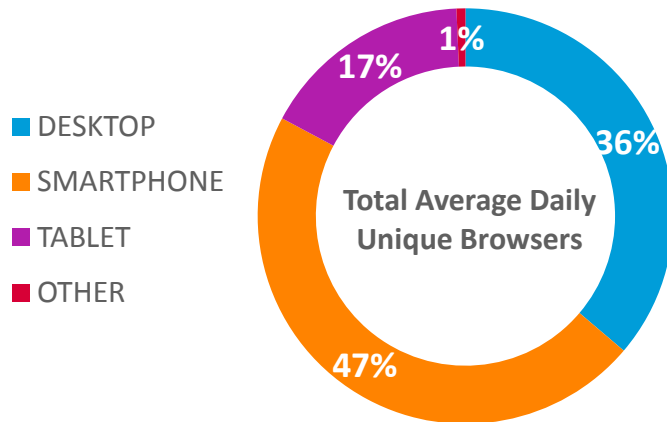
An abstract graphic on the left side of the slide. It features a series of concentric, curved lines that form a partial sphere or dome shape. The lines are colored in a gradient from purple to yellow. Several colored dots (yellow, purple, red) are placed on the surface of the sphere, with thin lines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

DEVICE HIGHLIGHTS

NIELSEN ONLINE RATINGS: MARKET
INTELLIGENCE

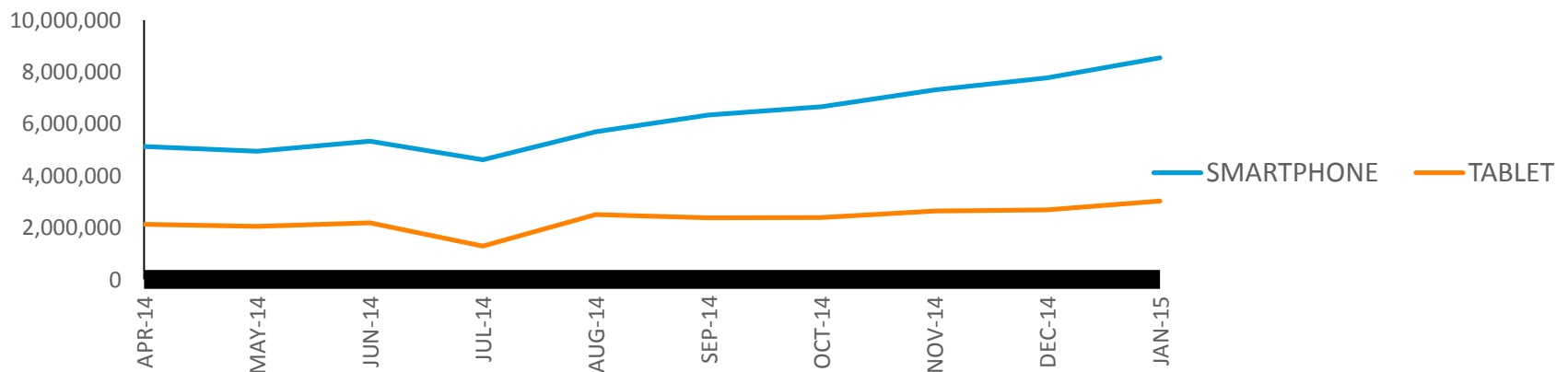
DEVICE TYPE COMPARISON (EXCLUDING APPLICATIONS)

January 2015 – Market Domain – Domestic Traffic



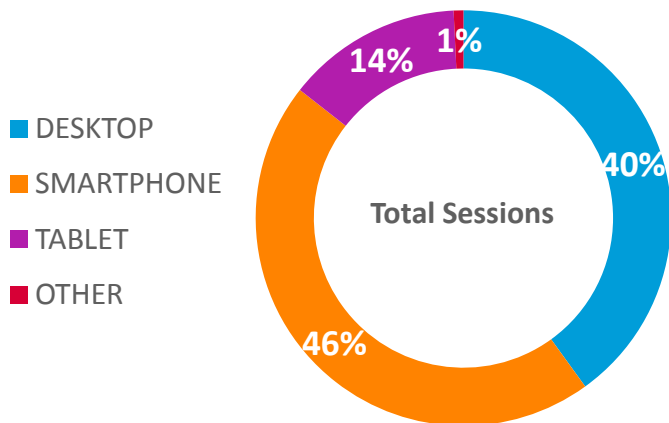
63% of total average daily unique browsers came from portable devices.

↑ 59% increase since April 2014 in total average daily unique browsers from portable devices



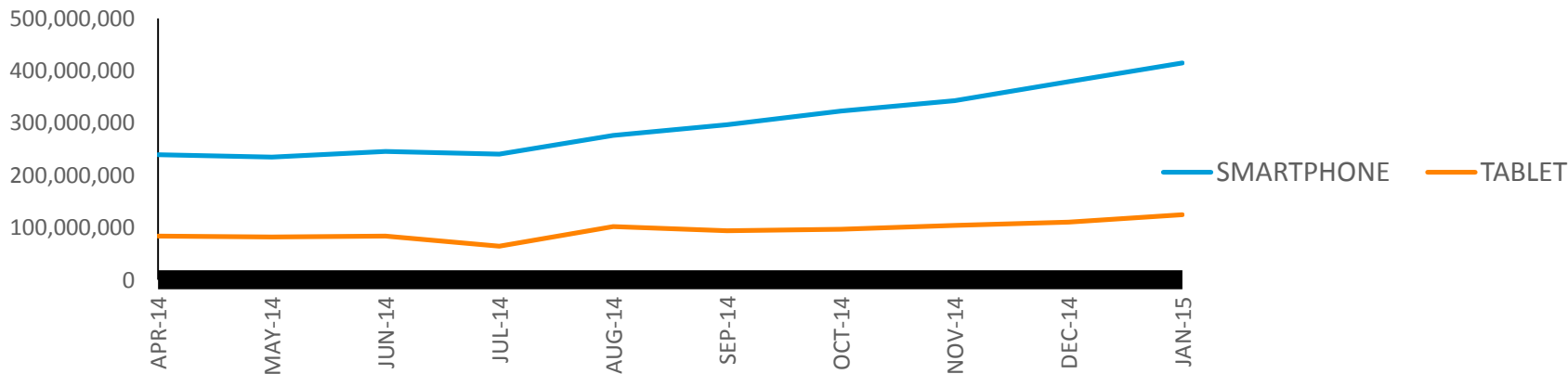
DEVICE TYPE COMPARISON (EXCLUDING APPLICATIONS)

January 2014 – Market Domain – Domestic Traffic



59% of total online sessions came from portable devices

↑ 67% increase since April 2014 in total online sessions from portable devices



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

An abstract graphic on the left side of the slide depicts a portion of a sphere or a dome. It is composed of numerous thin, curved lines in various colors (red, yellow, green, blue, purple) that create a grid-like pattern. Several colored dots (yellow, pink, red) are placed on the surface, with thin lines extending from them towards the right, suggesting a path or trajectory across the sphere's surface.

CATEGORY SPOTLIGHT: MULTI-CATEGORY TRAVEL



SNAPSHOT: MULTI-CATEGORY TRAVEL

Sites in the travel category experienced a boost in numbers following on from December. 9 out of the top 10 sites in this category reported significant growth in unique audience with 5 of these sites reporting marked increases in time per person.

Notably, Virgin Travel and Tourism and travel affiliate Priceline Network experienced growth in unique audience of 48.20% and 33.96% respectfully.

In terms of time per person, Expedia, Priceline Network and TripAdvisor reported increases of 45.22%, 26.39% and 23.05% respectfully.

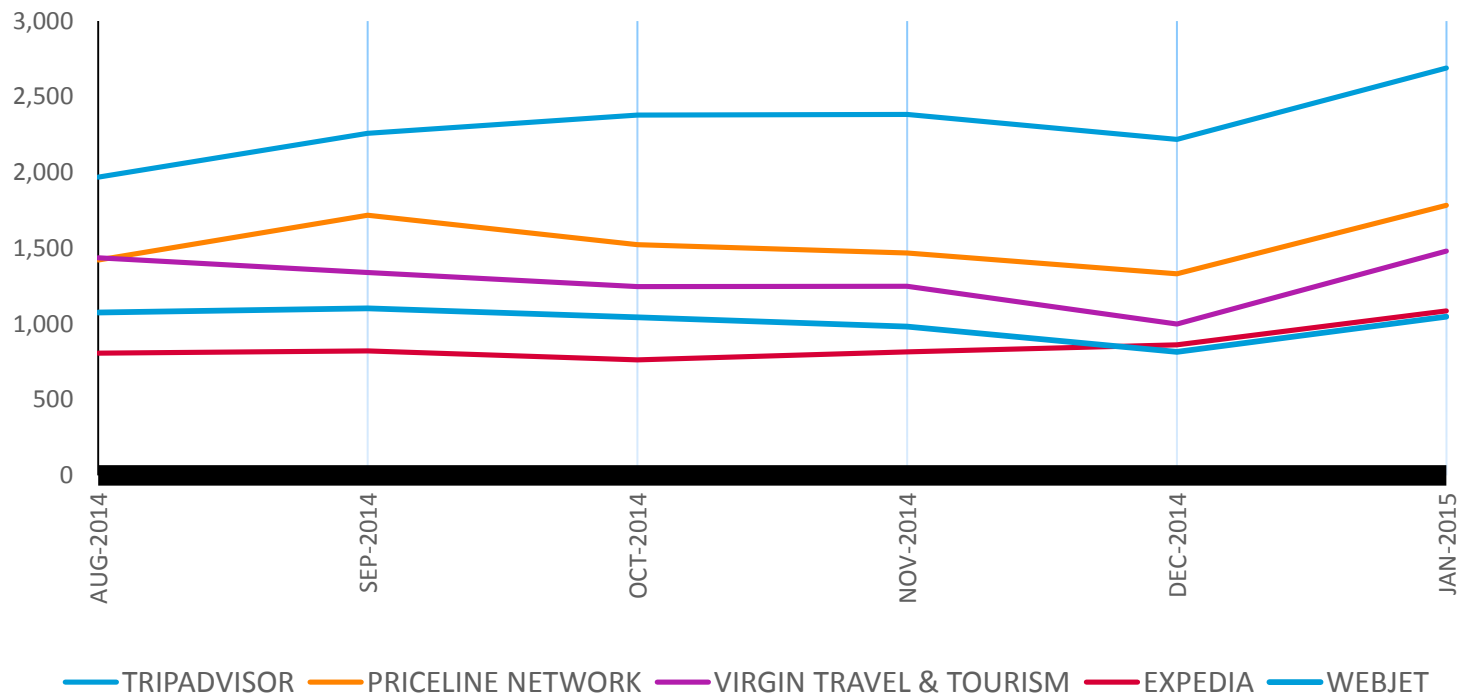
These figures indicate that during the month of January, more Australians browsed travel related sites for longer periods of time in contrast to December.

Sites	Unique Audience (000)	UA % change from December	Time Per Person (hh:mm:ss)	TPP % change from December	Sessions Per Person
TripAdvisor	2,689	+21.29%	00:20:49	+23.05%	3.07
Priceline Network	1,783	+33.96%	00:20:02	+26.39%	2.48
Virgin Travel & Tourism	1,479	+48.20%	00:13:02	+1.69%	2.57
Expedia	1,085	+25.87%	00:16:42	+45.22%	2.38
Webjet	1,047	+28.47%	00:18:59	+12.44%	2.46
news.com.au - Travel	1,002	-11.48%	00:07:33	-21.76%	5.79
Flight Centre	768	+21.52%	00:08:47	-14.45%	1.99
Traveller	710	+23.05%	00:08:07	-6.53%	3.28
Travel Ad Network	461	+0.22%	00:06:38	-32.77%	1.84
Orbitz Worldwide Network	404	+33.33%	00:08:24	-6.84%	1.88

Note: The data is representative of surfing only.

TREND: MULTI-CATEGORY TRAVEL

Unique Audience: August 2014 – January 2015



After a seasonal Christmas decline, the travel category reached its highest audience levels since August last year.

TripAdvisor increased significantly, with a boost of 37% month on month, followed closely by Expedia, with growth of 35% as Australians quickly resumed the search for their next holiday.

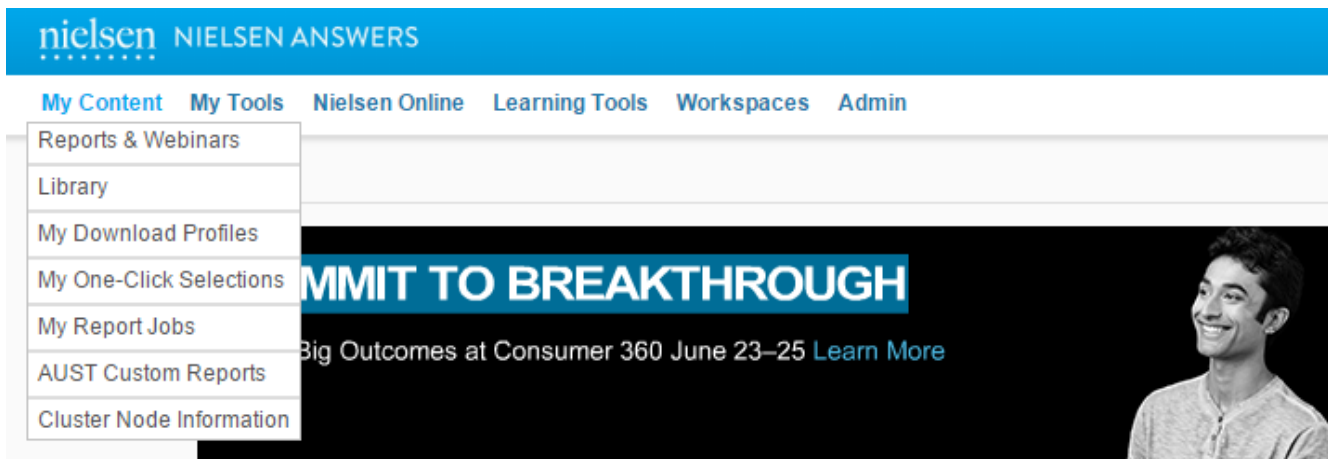
Note: The data is representative of surfing only.

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

GENERAL UPDATES FOR THIS MONTH:

NIELSEN ONLINE RATINGS – MONTHLY CLASSIFICATION UPDATE (FOR CLIENTS)

The **Nielsen Online Ratings – Update** report is a monthly report which provides the IAB and clients an outline of changes made to entities listed in Online Ratings each month.



The report will be available in the Nielsen Answers portal under *AUST Custom Reports > Nielsen Online Ratings – Updates* on the 6th of each month.

The excel report comprises of four spreadsheets:

- Parent Brand Channel Updates : includes changes/additions to parent/brand/channel names and definitions.
- Categorisation Updates : includes changes in categorisation or new brands/channels added to a category.
- Custom Roll-up Updates : includes changes/additions to custom roll-ups
- Notices : includes notices of any significant issues or changes

ONLINE CAMPAIGN RATINGS INTERFACE

On January 26, Nielsen released a refreshed interface for Online Campaign Ratings that features new functionalities and visualizations to make the user experience more intuitive and insightful. The previous Online Campaign Ratings interface will be retired on March 31, 2015.



New features include:

- A homepage dashboard displaying an overview of all campaigns, including status alerts on specific campaigns
- Dynamic charts and graphs in addition to exportable tables of campaign data (CSV or Excel formats)
- Enhanced search capabilities to easily find campaigns by ID or name
- Scheduled email reports with the new Report Builder
- Self-serve campaign setup!

ONLINE CAMPAIGN RATINGS INTERFACE

Campaign List
Ralph Lauren Midnight Romance X

SEARCH

Ralph Lauren Midnight Romance - (4/15/2014)

Active Demo Reporting Ready Pending

Export Edit Campaign

CAMPAIGN OVERVIEW

Mobile

Computer

This Split: 28,466,415

REPORT SELECTIONS

Parent Campaign ID:	Planned Run Dates: 5/21/2013 - 9/28/2014	Target Demo: 2+	Impressions to Date: 15,873,278
REPORT SELECTIONS	Split Data Dates: 4/15/2014 - 5/29/2014	Primary Country: US	Products: NOCR_IAS

FILTERS

Split ID: som343 (4/15/2014)	Start Date: 04/15/2013	End Date: 05/29/2014	Device/Platform: [X] Total Digital
Geography:	Media Plan: Homepage Takeover, ROI	Demo Type: Age & Gender	Demographics: 2+, M13-17, M18-20, M21

Apply Reset

Overview
Audience Profile
Device / Platform
Site / Placement
Trends
Geography
Viewability
Notifications

On-Target Performance

Campaign Audience Profile

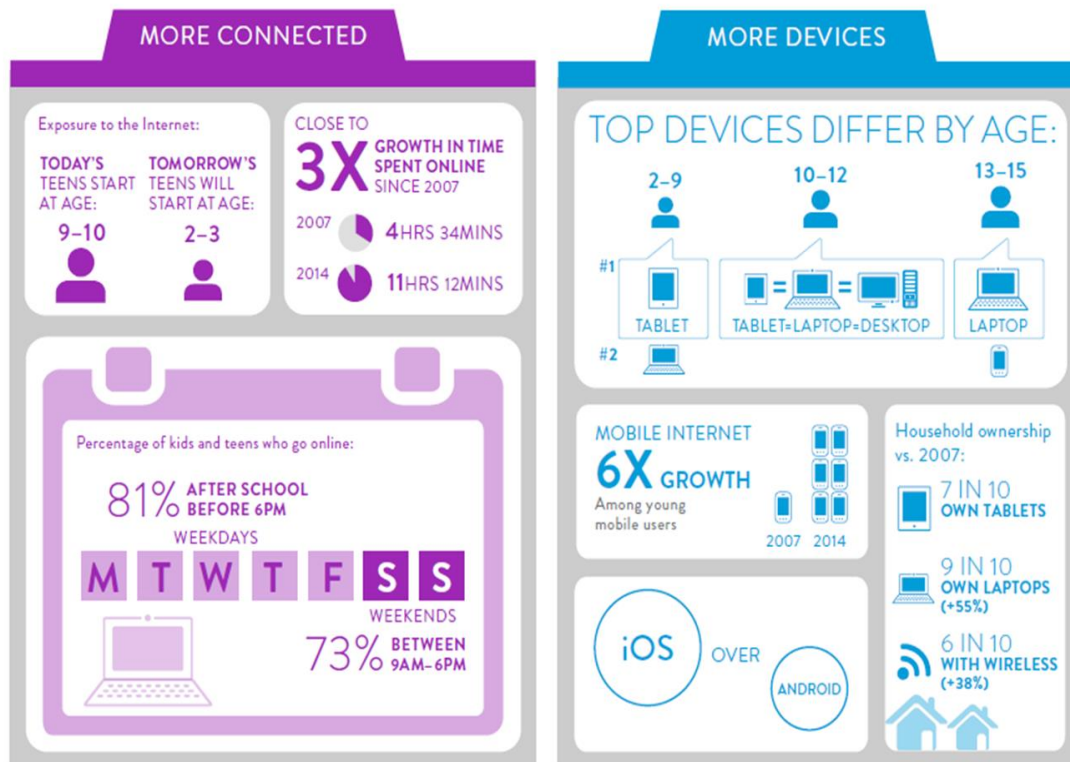
REPORTING

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24

CHILD'S PLAY: CONNECTED AUSSIE KIDS SPEND UP TO EQUIVALENT OF THREE SCHOOL DAYS ONLINE EVERY WEEK

MEET TODAY'S CONNECTED KIDS AND TEENS



The time Australian kids and teens spend online has increased exponentially over the past seven years.

Connected youths aged 2-15 years are spending an average of 11.5 hours with the Internet each week, increasing three-fold since 2007.

And the older they become, the more time they spend online.

To read the rest of the article, click [here](#).

To learn more about the Australian E-Generation Report, click [here](#).

Source: Nielsen Australian eGeneration Report December 2014 – Connected Kids and Teens' Evolving Patterns of Media Consumption
Note: Report is based on Online Australians 2-15 years (however comparisons to 2007 are for the age group 6-14 years)

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AN UNCOMMON SENSE
OF THE CONSUMER™

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