



nielsen

THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

MAY 2015



STATE OF THE ONLINE LANDSCAPE

May 2015

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

The online landscape in May saw Australians spend 39 hours online over 65 sessions; with 42 billion minutes spent online and 31 billion pages viewed.

In this month's edition we look more closely at travel sites, with a focus on airlines, hotels and hotel directories. Total audiences to the category increased in May, while the overlap between travel directory / aggregation sites and direct airline sites was high.

In the news:

- Nielsen appoints Craig Johnson as Head of Reach Solutions for the SEANAP region. Further details [here](#).

Insights:

- Measuring Devices Is No Substitute For Measuring People – The distinction between measuring consumers and devices. Read more [here](#).
- Nielsen Twitter TV Ratings for May – Logies takes top spot for non-sport and Mayweather vs Pacquiao ranks first in sport for the month.

If you'd like to know more about any of the data presented within this report, please contact your Nielsen Account Manager directly or email careau@nielsen.com.



HIGHLIGHTS

NIELSEN ONLINE RATINGS: HYBRID SURFING

AT A GLANCE: THE ONLINE LANDSCAPE

May 2015



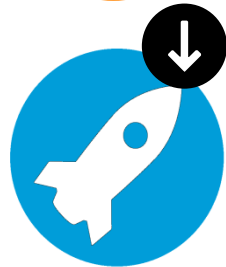
31 billion viewed pages.



42 billion minutes spent.



39 hours spent online, across **65 sessions** per person.



17,952,000 people were actively surfing online.



Indicates growth or decline based on the previous month

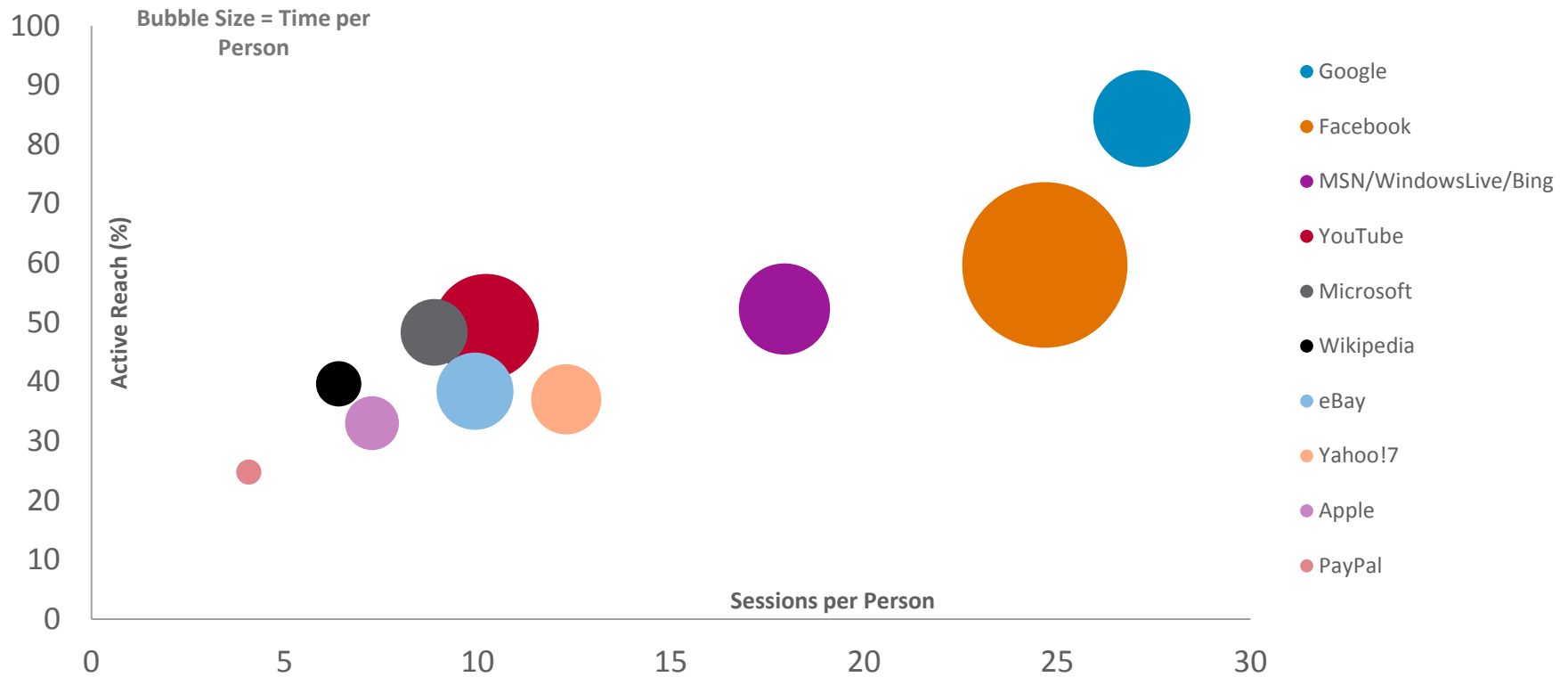
TOP 10 BRANDS AND THEIR ENGAGEMENT

May 2015

Unique Audience Rank	Brands	Unique Audience (000s)	Active Reach (%)	Sessions Per Person	Time Per Person (hh:mm:ss)
1	Google	15,145	84.37	27.18	02:56:02
2	Facebook	10,715	59.69	24.67	08:32:14
3	MSN/WindowsLive/Bing	9,385	52.28	17.94	02:35:27
4	YouTube	8,844	49.27	10.21	03:29:15
5	Microsoft	8,674	48.32	8.87	01:23:39
6	Wikipedia	7,120	39.66	6.40	00:38:32
7	eBay	6,893	38.40	9.93	01:50:53
8	Yahoo!7	6,646	37.02	12.28	01:32:02
9	Apple	5,929	33.03	7.26	00:54:16
10	PayPal	4,448	24.78	4.07	00:11:44

TOP 10 BRANDS AND THEIR ENGAGEMENT

May 2015



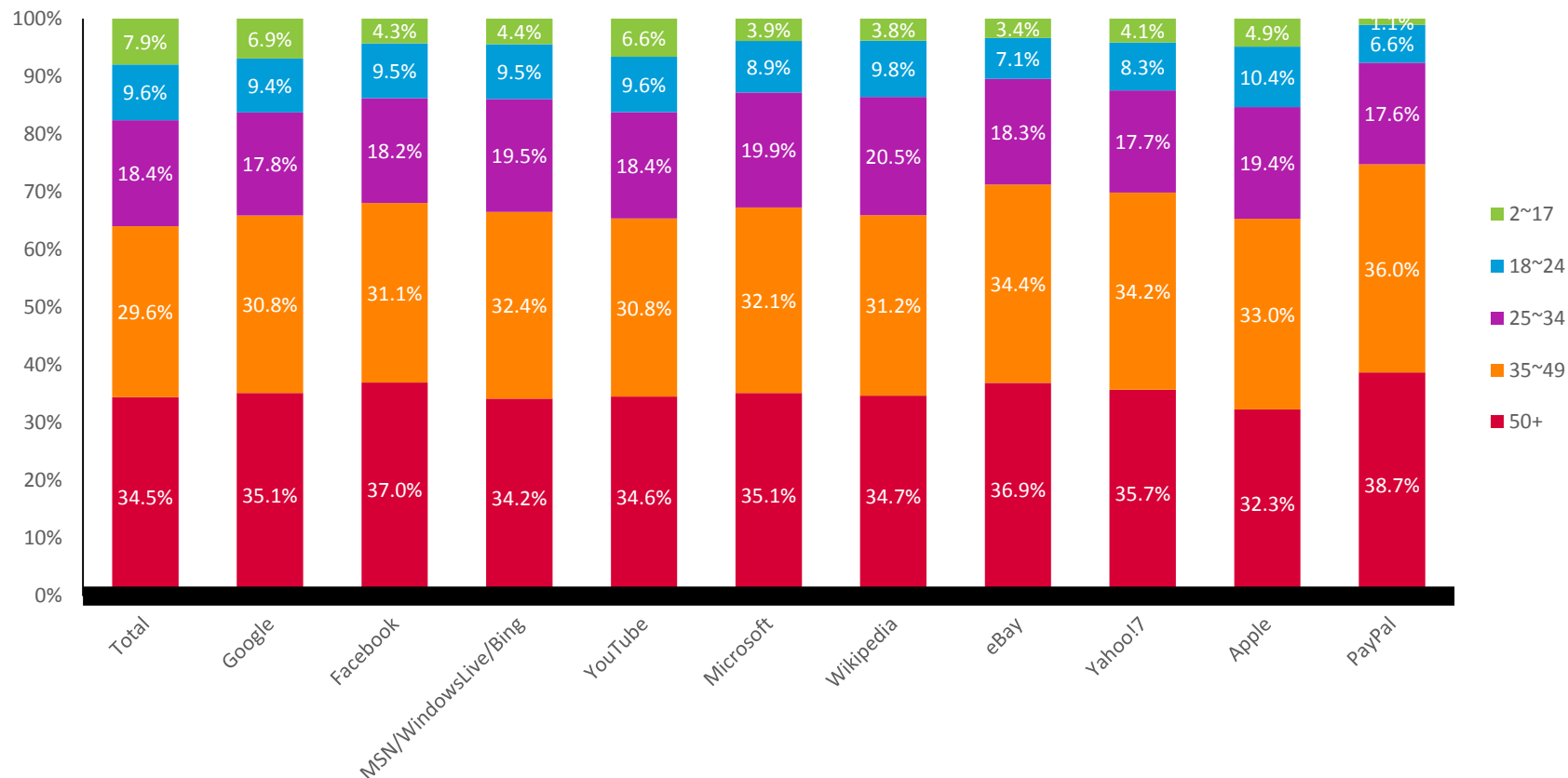
All of the top 10 brands experienced an increase in engagement across all key metrics this month in comparison to April.

PayPal edged into the top 10 with growth of 9% in sessions per person and 18% in time per person.

Other notable increases include MSN/WindowsLive/Bing with an extra 15% in time per person followed by Facebook with an additional 12% in time per person. Both of these sites gained an additional 7% in sessions per person.

TOP 10 BRANDS BY AGE

Unique Audience (Surfing): May 2015

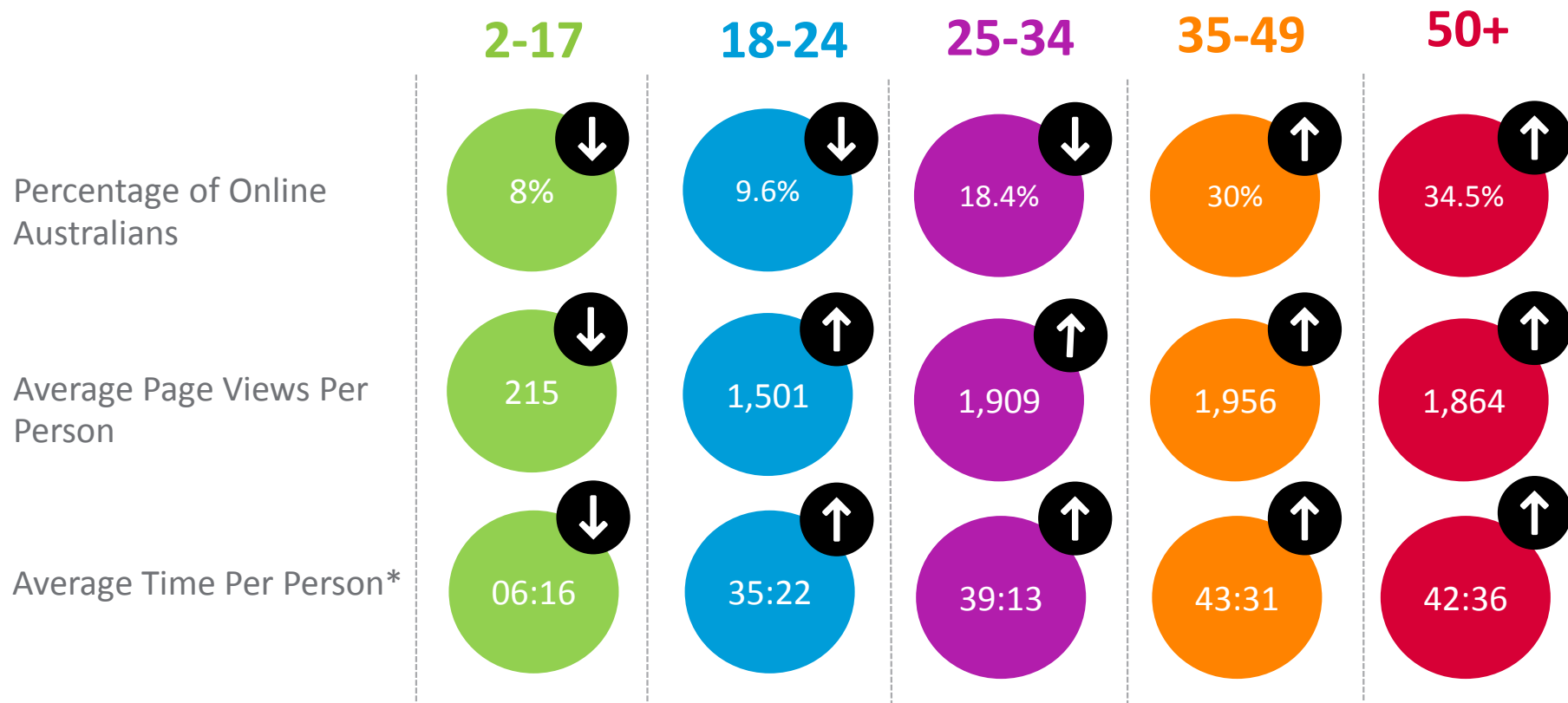


Of the top ten brands, PayPal reports the heaviest skew towards Australians aged 35+, accounting for almost three quarters of their audience.

Meanwhile, Wikipedia has the highest proportion of young adults between 18 and 34 years of age. Brands like Google and YouTube have the highest skew towards kids aged 2-17 at 6.9% and 6.6% respectively.

HYBRID SURFING: AGE DEMOGRAPHICS ONLINE

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



Those aged 25-34 reported 163,000 extra page views while those 35 and over spent over 3 extra hours surfing.

↑ ↓ Indicates growth or decline based on the previous month

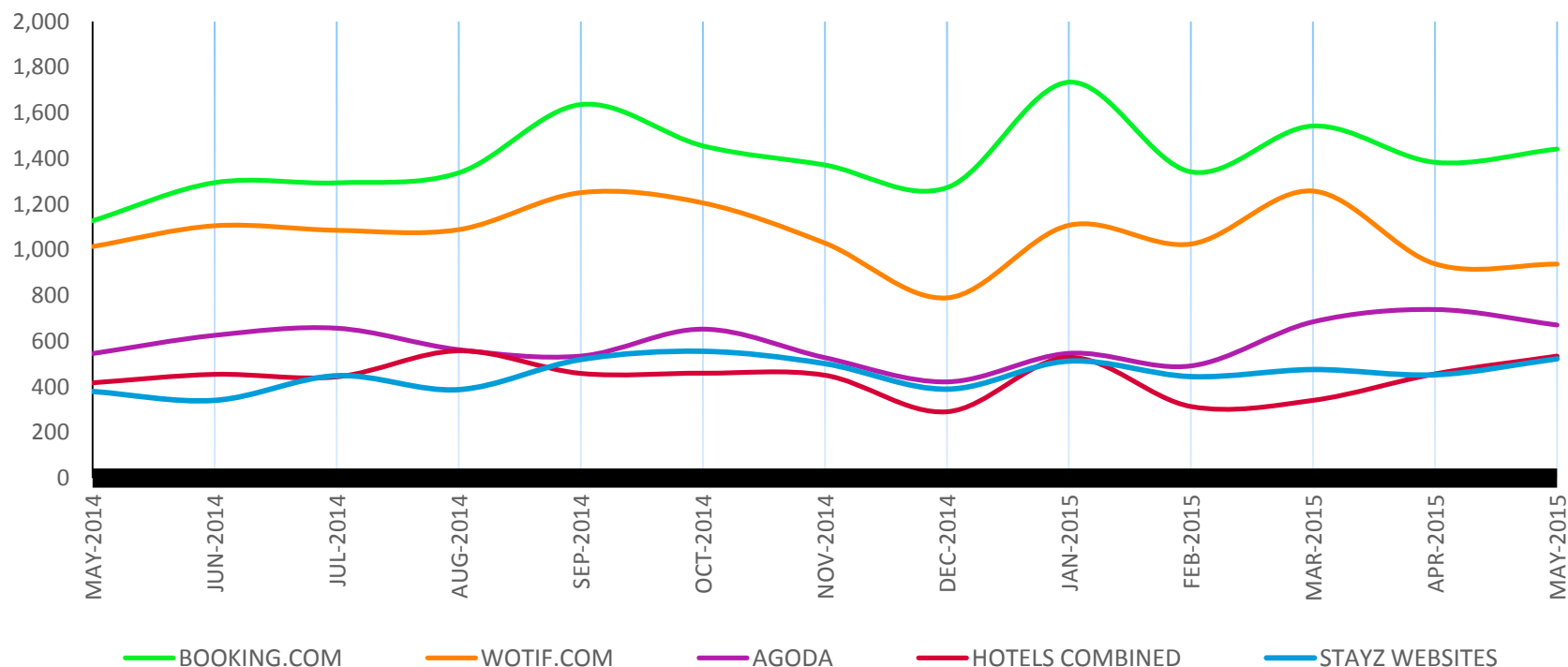
*HH:MM



CATEGORY SPOTLIGHT: HOTEL DIRECTORIES AND AIRLINES

TOP 5 HOTEL DIRECTORY SITES – YEAR ON YEAR

Unique Audience: May 2014 – May 2015



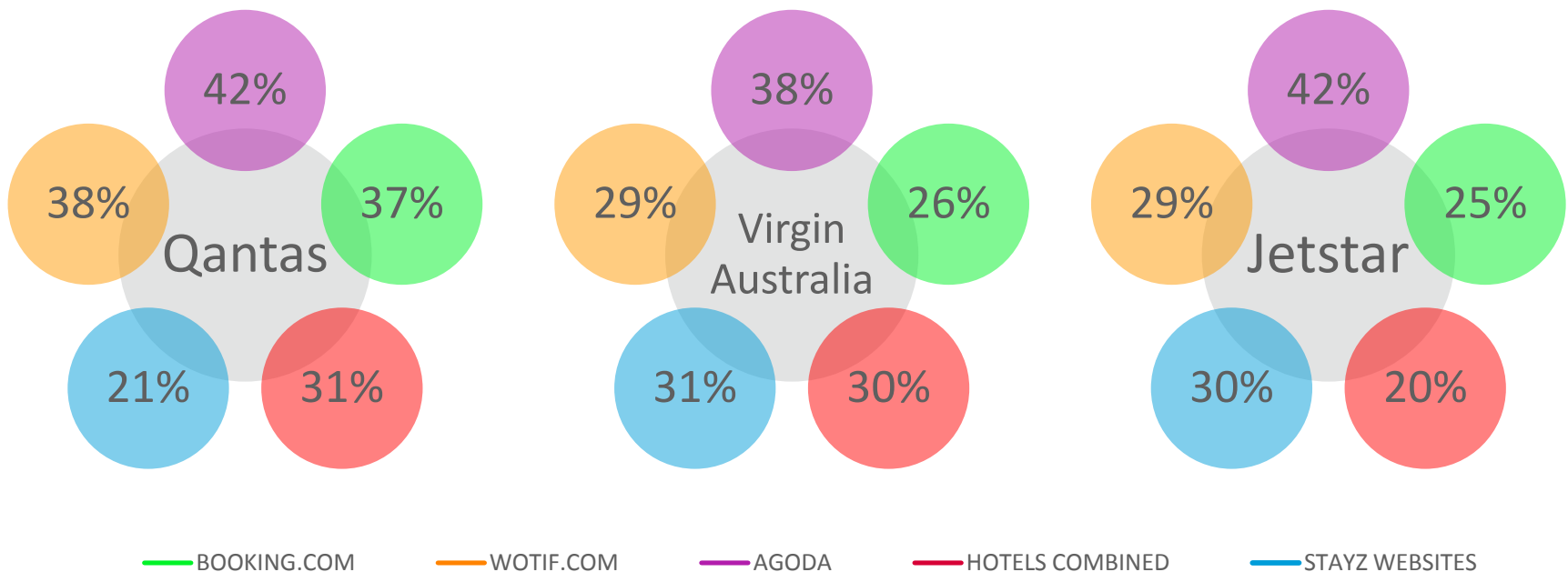
This month the hotel directories category reported an additional 158,000 people compared to April, with an extra 559,000 people year on year, representing an increase of 15% since May 2014.

During that time, Stayz Websites grew the most year on year with 38% growth in unique audience, followed by Hotels Combined and Booking.com at 28%.

Notable month on month increases include Hotels Combined and Stayz Websites with an additional 17% and 16% respectively.

AIRLINE SITES VS TRAVEL DIRECTORIES

Shared Unique Audience - Airline and Hotel Directory Sites: May 2015



Looking closer at the top 5 hotel directories sites, 42% of people who visited Agoda also visited Qantas or Jetstar, with 38% of Agoda visitors also visiting Virgin Airlines.

People who browsed Booking.com or Wotif.com also visited Qantas the most out of the three top sites in the airline category at 37% and 38% respectively.

Meanwhile, 31% of Australians who visited Stayz Websites also visited Virgin Australia.

HIGHLIGHTS

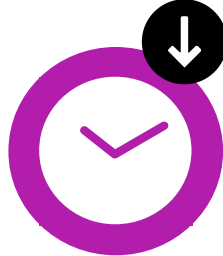
NIELSEN ONLINE RATINGS: HYBRID STREAMING

HYBRID STREAMING KEY ONLINE STATISTICS

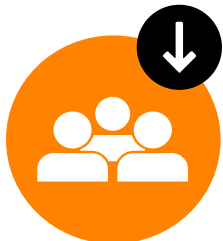
May 2015



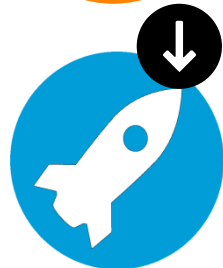
3.3 billion streams watched.



6 billion minutes streamed.



7 hours and 23 minutes spent streaming per person.



13,634,000 people were actively streaming online.



Indicates growth or decline based on the previous month

HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

May 2015

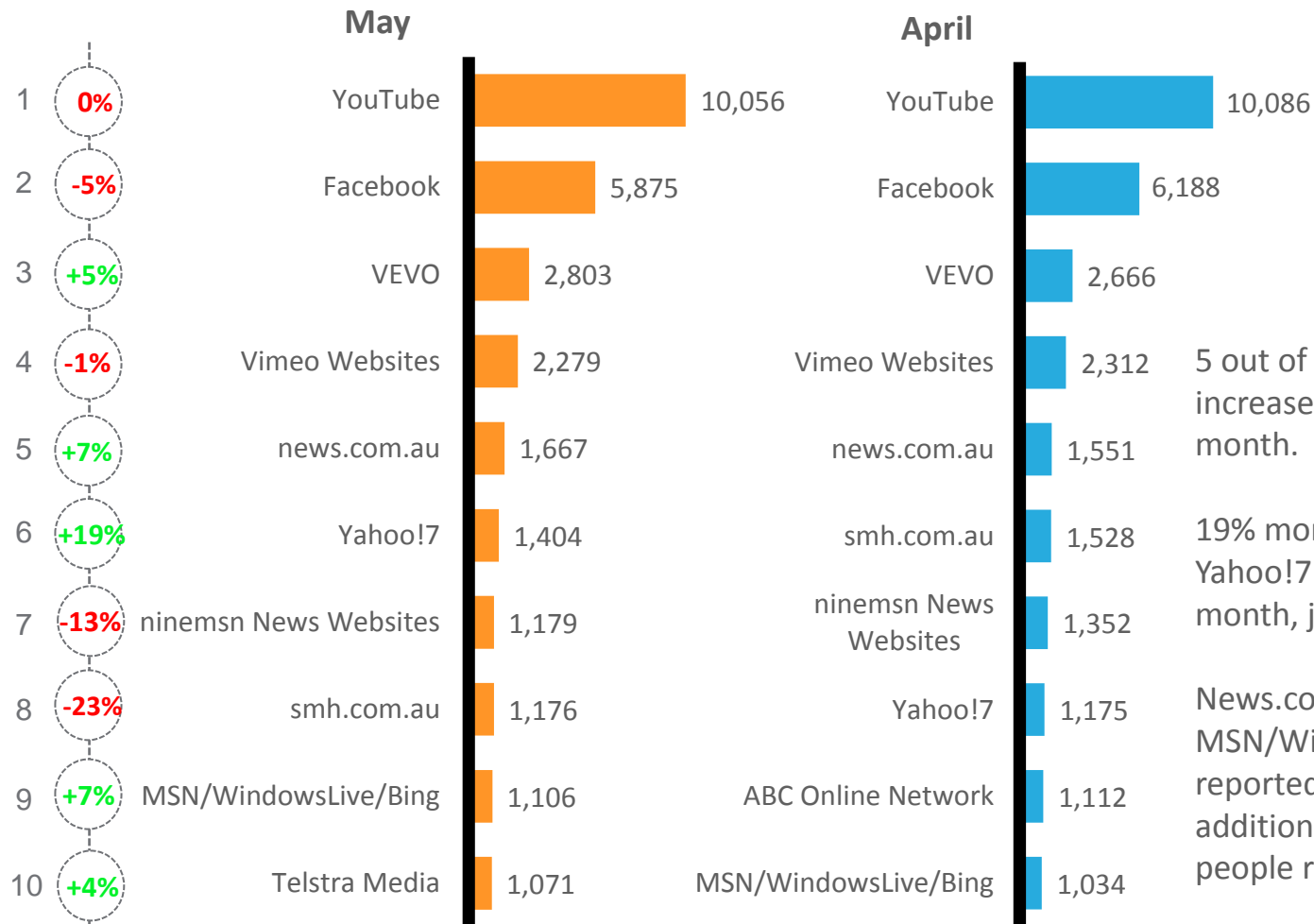
Unique Audience Rank	Brand	Unique Audience (000s)	Total Streams	Time Per Person (hh:mm:ss)
1	YouTube	10,056	1,812,305	04:03:57
2	Facebook	5,875	201,982	01:49:50
3	VEVO	2,803	123,662	00:40:21
4	Vimeo Websites	2,279	8,423	00:11:48
5	news.com.au	1,667	11,645	00:10:09
6	Yahoo!7	1,404	14,992	00:36:23
7	ninemsn News Websites	1,179	11,402	00:10:19
8	smh.com.au	1,176	3,548	00:05:18
9	MSN/WindowsLive/Bing	1,106	7,120	00:08:04
10	Telstra Media	1,071	7,780	00:36:06

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, May 2015

TOP BRANDS COMPARISON – HYBRID STREAMING

May 2015, Unique Audience (000)



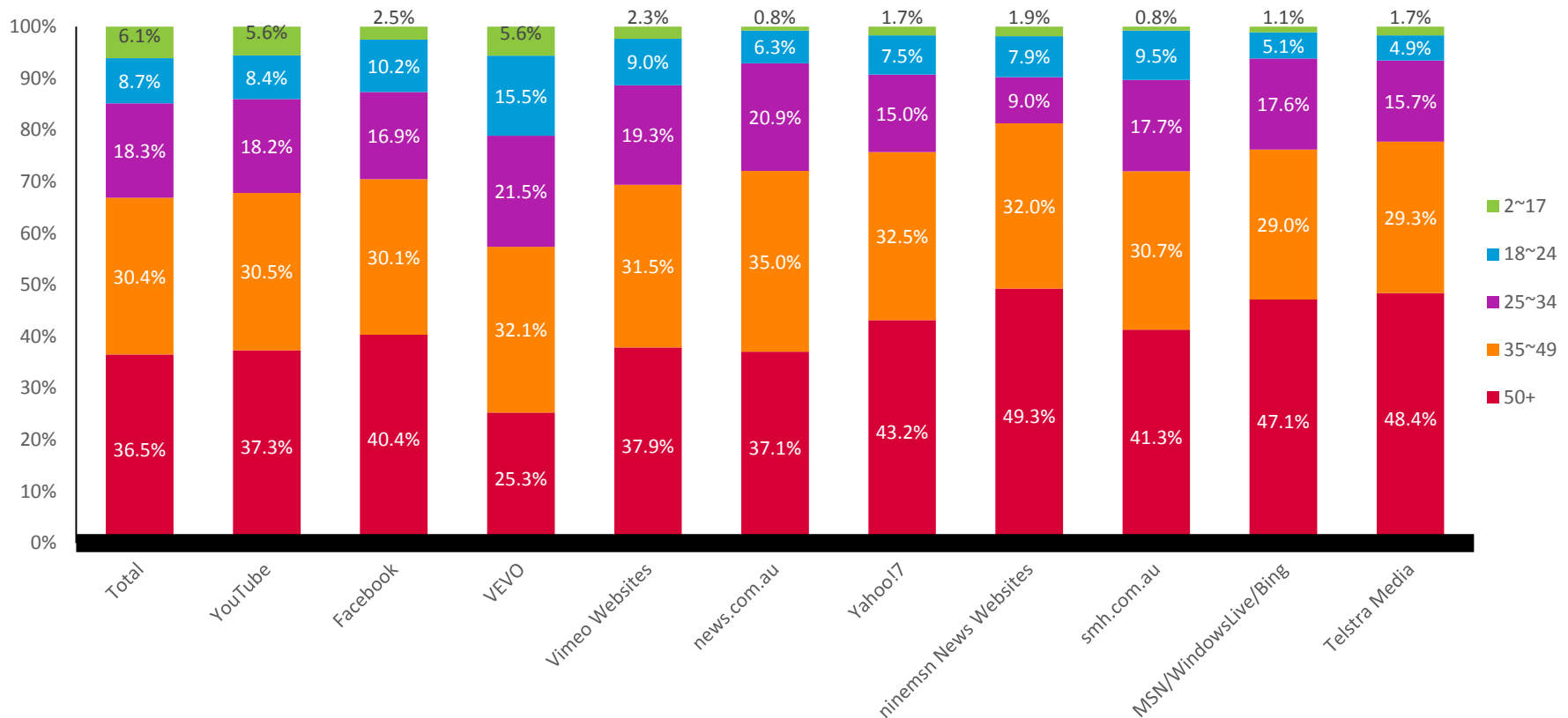
5 out of the top 10 sites reported increases in Unique Audience this month.

19% more Australians streamed Yahoo!7 in comparison to last month, jumping two spots to 6th.

News.com.au and MSN/WindowsLive/Bing both reported increases of 7% with an additional 166,000 and 72,000 people respectively.

TOP 10 STREAMING BRANDS BY AGE

Unique Audience (Streaming): May 2015

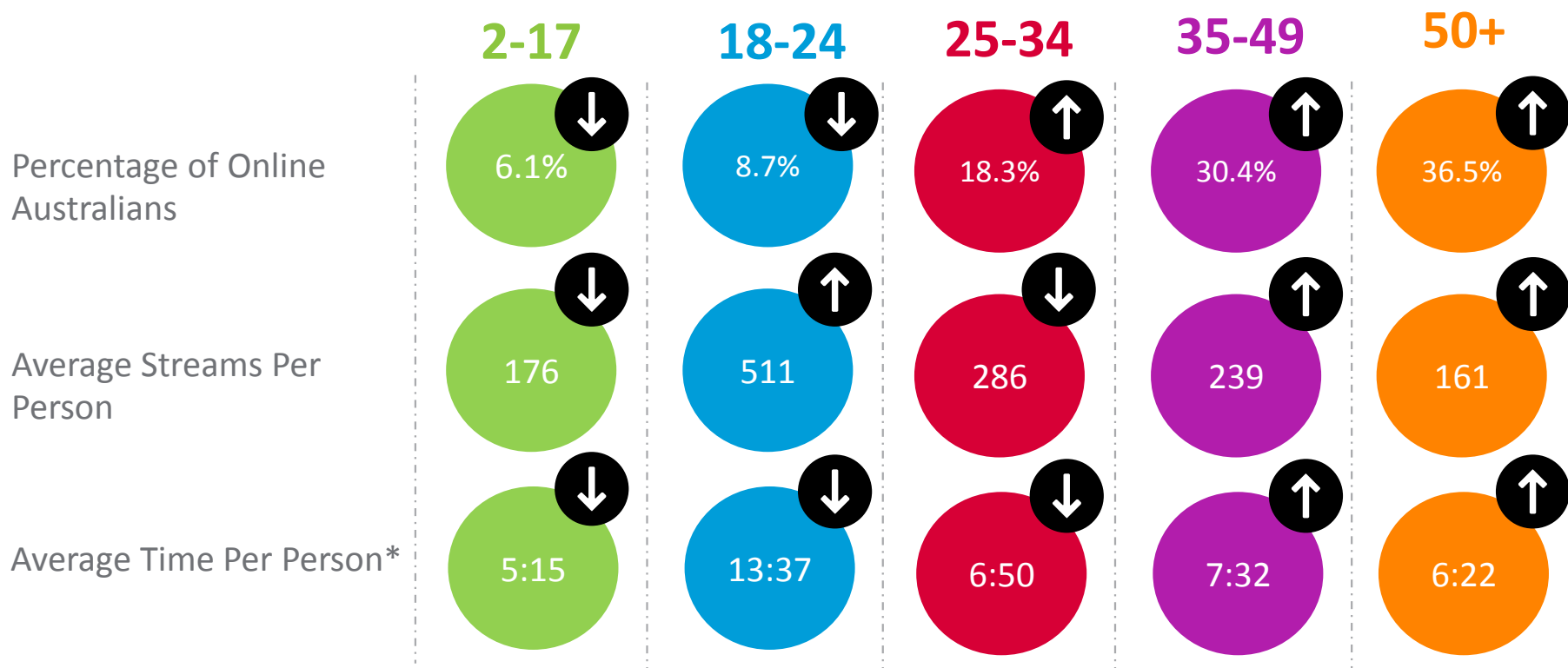


The top ten streaming brands split by age reveals that ninemsn News Websites has the largest skew towards Australians aged 50+ at 49.3%, followed by Telstra Media at 48.4%.

Meanwhile, news.com.au reports the heaviest skew towards 35-49 year olds at 35% with VEVO retaining its high proportion of the younger audience between 2-34.

HYBRID STREAMING: AGE DEMOGRAPHICS ONLINE

May 2015



4 out of the 5 age groups experienced growth in unique audience composition this month with notable growth spurts in the older age groups. Australians aged 35-49 reported an extra 36 streams per person this month, reaching 239 streams per person. In addition, Australians aged 50+ streamed an extra 40 minutes this month compared to last month.

↑ ↓ Indicates growth or decline based on the previous month

*HH:MM

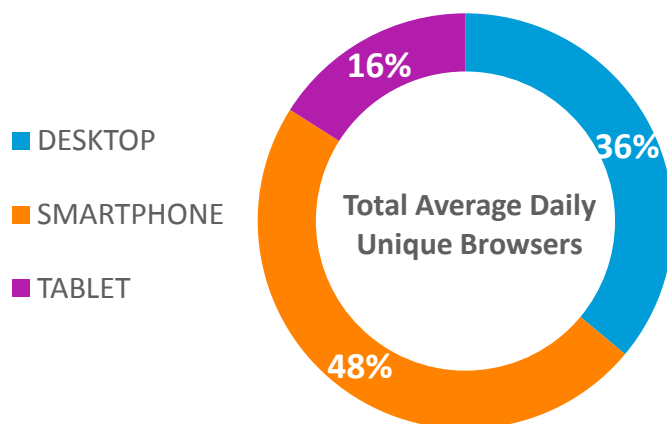


DEVICE HIGHLIGHTS

NIELSEN ONLINE RATINGS: MARKET INTELLIGENCE

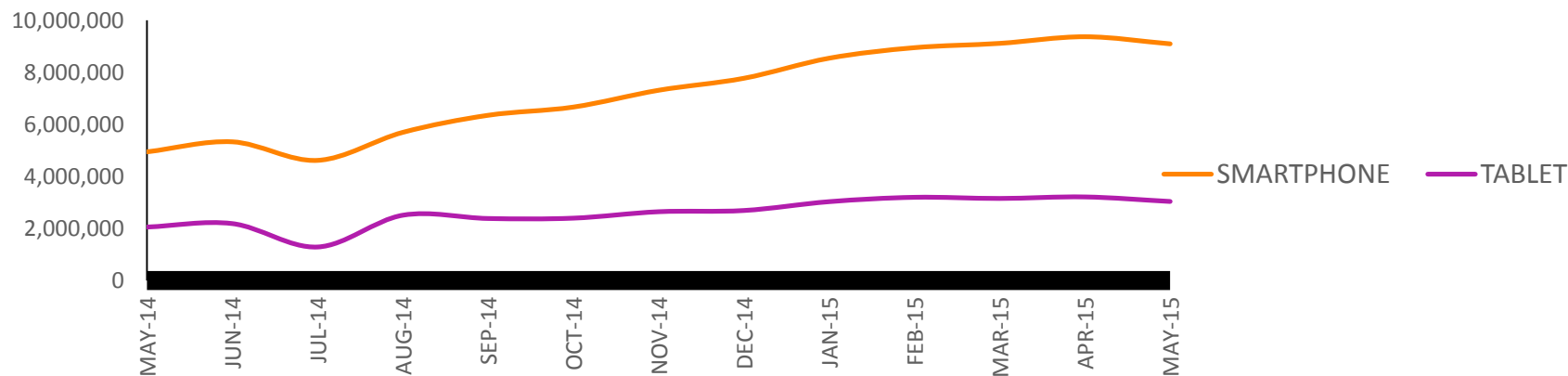
AUSTRALIANS BROWSE MORE ON PORTABLE DEVICES

May 2015 – Market Domain – Domestic Traffic



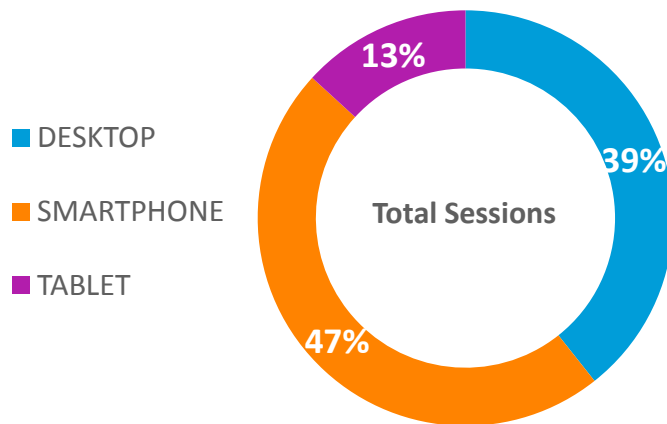
64% of total average daily unique browsers came from portable devices.

↑ 73% increase since May 2014 in total average daily unique browsers from portable devices



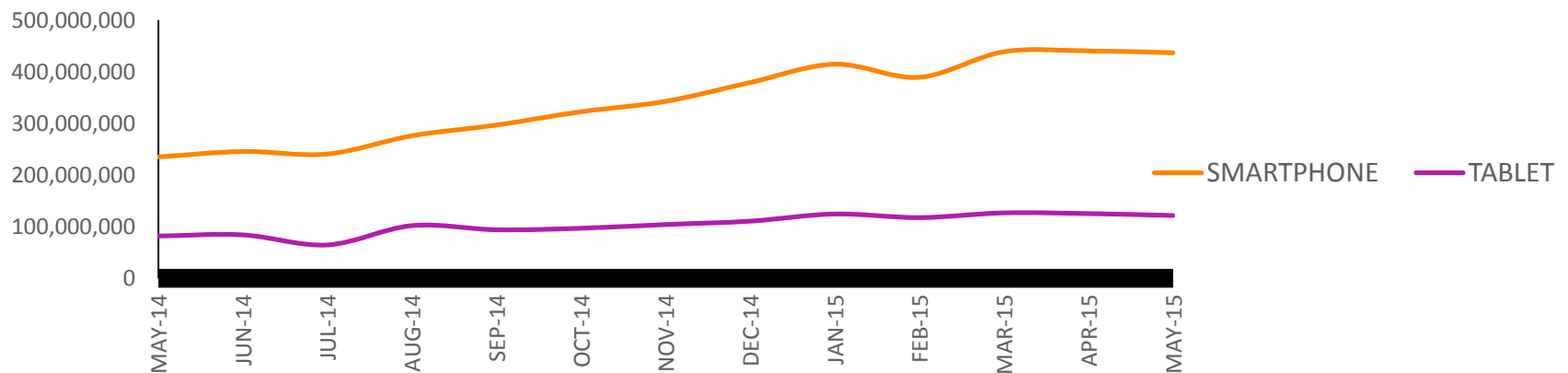
SESSIONS ON PORTABLE DEVICES HAS GROWN 76% IN A YEAR

May 2015 – Market Domain – Domestic Traffic



61% of total online sessions came from portable devices

↑ 76% increase since May 2014 in total online sessions from portable devices





GENERAL UPDATES FOR THIS MONTH:



CRAIG JOHNSON TO HEAD UP SEANAP REACH SOLUTIONS PORTFOLIO

NIELSEN APPOINTS CRAIG JOHNSON AS HEAD OF MEDIA FOR SOUTH-EAST ASIA AND PACIFIC



With Paul Fisher departing earlier this year, we are thrilled to welcome **Craig Johnson** as head of Nielsen's Media portfolio across Southeast Asia, North Asia and Pacific.

Craig is charged with overseeing product leadership our television audience measurement (TAM), radio audience measurement (RAM), Consumer & Media View (CMV) and advertising measurement (AIS) solutions with immediate effect.

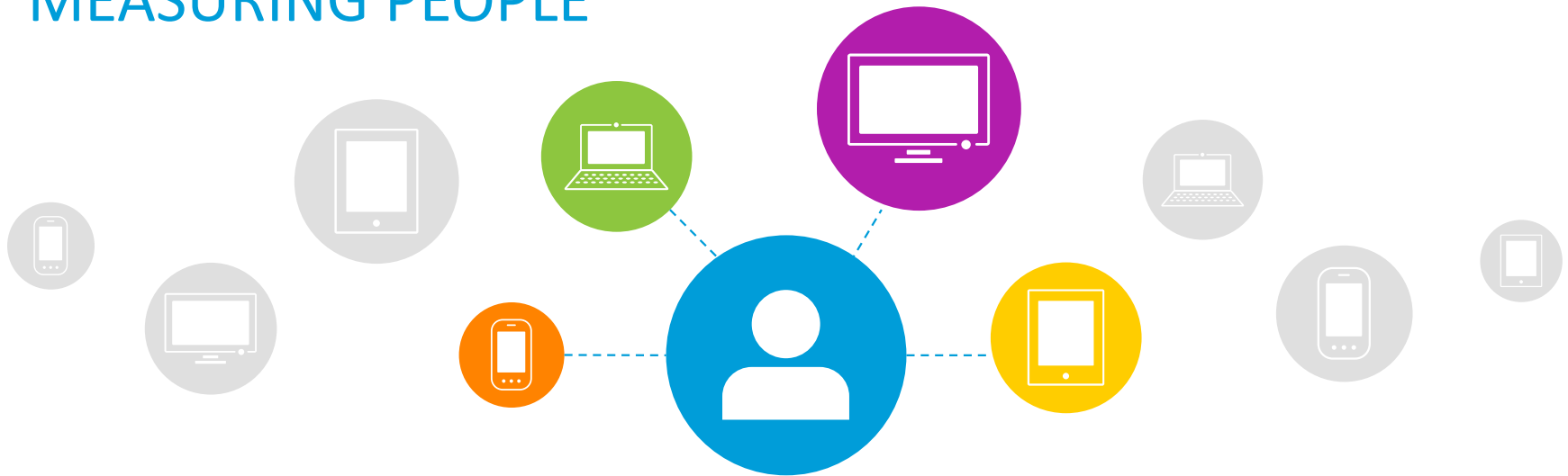
Craig is a true media industry veteran. Prior to joining Nielsen in 2006, he spent a number of years working for one of Australia's national broadcast media owners. During his time with Nielsen he has worked with a broad cross-section of clients around the world including television and radio broadcasters, media agencies, brands and industry bodies.

To read more about this appointment, click [here](#).



MEASURING DEVICES IS NO SUBSTITUTE FOR MEASURING PEOPLE

MEASURING DEVICES IS NO SUBSTITUTE FOR MEASURING PEOPLE



The most elusive and valuable of all media measurement is an independent, reliable understanding of the people who consumed a piece of content – whether it be video, audio or text.

There are a host of amazing analytics technologies and platforms that help publishers, media planners and advertisers measure the number of devices that view their content.

However, the ability to provide an accurate view of how many actual people those viewing and readership metrics represent – is rare.

To learn more, click [here](#).

NIELSEN TWITTER TV RATINGS

NIELSEN TWITTER TV RATINGS

Nielsen Twitter TV Ratings - May, 2015

Monthly Top Five - Non Sport



Australia

Rank	Network	Program	Date	Unique Audience	Impressions	Unique Authors	Tweets
1	NINE	57th Annual TV Week Logie Awards	03/05/15	231.3K	6.7M	11.8K	37.6K
2	SBSONE	Eurovision Song Contest Final 2015	24/05/15	152.6K	4.2M	9.7K	67.3K
3	SBSONE	Struggle Street	06/05/15	98.6K	1.4M	3.1K	7.9K
4	TEN	The Project	04/05/15	87.6K	253K	1.8K	2.8K
5	SEVEN	My Kitchen Rules	04/05/15	86.9K	1.5M	3.8K	12.2K

Source: Nielsen Australia. Rankings based on Unique Audience. Unique Authors and Tweets are a measure of relevant Australian Twitter activity from three hours before through three hours after broadcast, local time. Reach metrics (Unique Audience and Impressions) measure the audience of relevant Tweets ascribed to a program from when the Tweets are sent until the end of the broadcast day at 5am. Non-sport includes live/new episodes only.

NIELSEN TWITTER TV RATINGS

Nielsen Twitter TV Ratings - May, 2015

Monthly Top Five - Sport



Australia

Rank	Network	Program	Date	Unique Audience	Impressions	Unique Authors	Tweets
1	MAIN EVENT	Mayweather vs Pacquiao	03/05/15	271.2K	4.4M	24.1K	65.2K
2	NINE	State of Origin	27/05/15	220.3K	5.2M	17.2K	49.7K
3	*SBSONE, FOXSPORTS4	A-League Grand Final Melbourne Victory v Sydney FC	17/05/15	179.8K	2.6M	7.4K	21.3K
4	*SEVEN, FOXFOOTY	AFL Sydney v Carlton	29/05/15	103.9K	1.7M	5.7K	13.5K
5	NINE	Rugby League Trans Tasman Test Australia v New Zealand	03/05/15	102.6K	1M	3.0K	8.7K

Source: Nielsen Australia. Rankings based on Unique Audience. Unique Authors and Tweets are a measure of relevant Australian Twitter activity from three hours before through three hours after broadcast, local time. Reach metrics (Unique Audience and Impressions) measure the audience of relevant Tweets ascribed to a program from when the Tweets are sent until the end of the broadcast day at 5am. For simulcast events the metrics reflect the highest Unique Audience across all airing networks and is denoted with an asterisk.



DID YOU KNOW?

GET TO KNOW YOUR CONSUMER!

We're changing quicker than you might think. Australians are **more multicultural** and **more digital**. Do you know your consumer?

Today, **1 in 9** Australians identify as non-European. This will grow to **1 in 7** by 2025.

Asian-Australians represent less than **1 in 12** Australians.

Nearly **1 in 3** Australians don't have a landline in their home anymore.

More than **2/3** of Australians are shopping online - and it's growing!

Source: Nielsen Consumer & Media View

An abstract graphic in the bottom-left corner of the slide. It features a series of concentric, overlapping arcs in various colors (blue, red, green, yellow, purple) that form a stylized representation of a globe or a network. Several small, colored dots (blue, red, green, yellow, purple) are placed at various points along these arcs, with thin lines extending from them towards the right side of the slide.

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AN UNCOMMON SENSE
OF THE CONSUMER™

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