



nielsen

THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

JUNE 2015

iab.
australia preferred
supplier



STATE OF THE ONLINE LANDSCAPE

June 2015

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

The online landscape in June saw Australians spend 37 hours online over 63 sessions; with 41 billion minutes spent online.

This month's issue looks at the shopping habits of Australian men and women by examining the classifieds and mass merchandiser categories. Analysis revealed that while home-wares and department stores had the highest skew towards females, tech stores had the highest skew towards males.

Insights:

- Nielsen Twitter TV Ratings: Sad News For The Blues! Queensland Victory On Twitter And On Field

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.



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 small, colored dots (yellow, pink, red) are scattered across the surface, with thin lines extending from them towards the right side of the frame.

HIGHLIGHTS

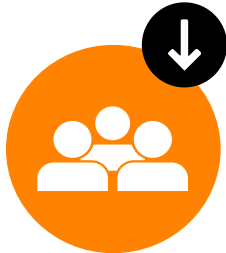
NIELSEN ONLINE RATINGS: HYBRID SURFING

AT A GLANCE: THE ONLINE LANDSCAPE

June 2015



41 billion minutes spent.



37 hours spent online, across **63 sessions** per person.



18,128,000 people were actively surfing online.

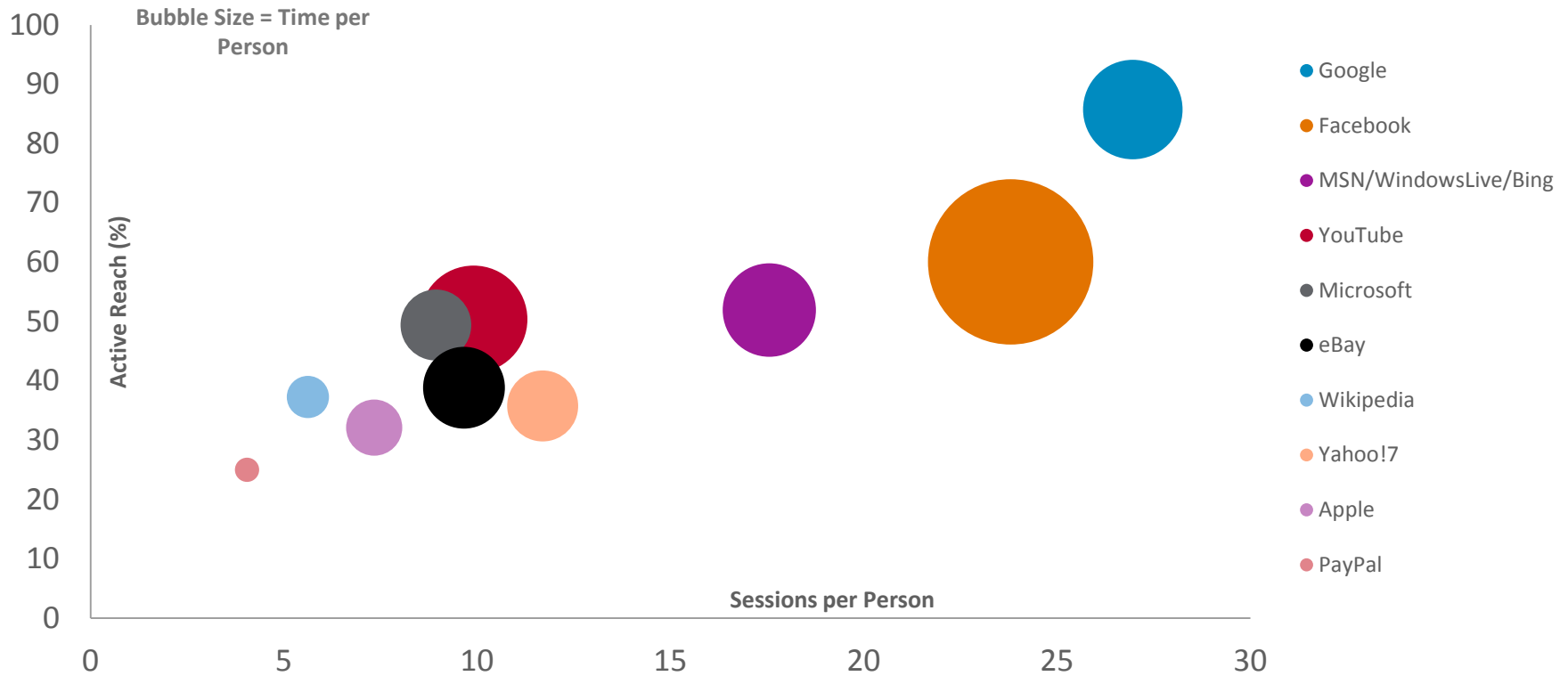
TOP 10 BRANDS AND THEIR ENGAGEMENT

June 2015

Unique Audience Rank	Brands	Unique Audience (000s)	Active Reach (%)	Sessions Per Person	Time Per Person (hh:mm:ss)
1	Google	15,538	85.71	26.95	02:52:56
2	Facebook	10,885	60.04	23.80	07:58:19
3	MSN/WindowsLive/Bing	9,410	51.91	17.55	02:32:37
4	YouTube	9,129	50.36	9.90	03:22:29
5	Microsoft	8,957	49.41	8.93	01:27:36
6	eBay	7,036	38.81	9.66	01:56:57
7	Wikipedia	6,752	37.25	5.62	00:31:10
8	Yahoo!7	6,482	35.76	11.69	01:27:52
9	Apple	5,818	32.09	7.33	00:55:12
10	PayPal	4,528	24.98	4.04	00:10:20

TOP 10 BRANDS AND THEIR ENGAGEMENT

June 2015



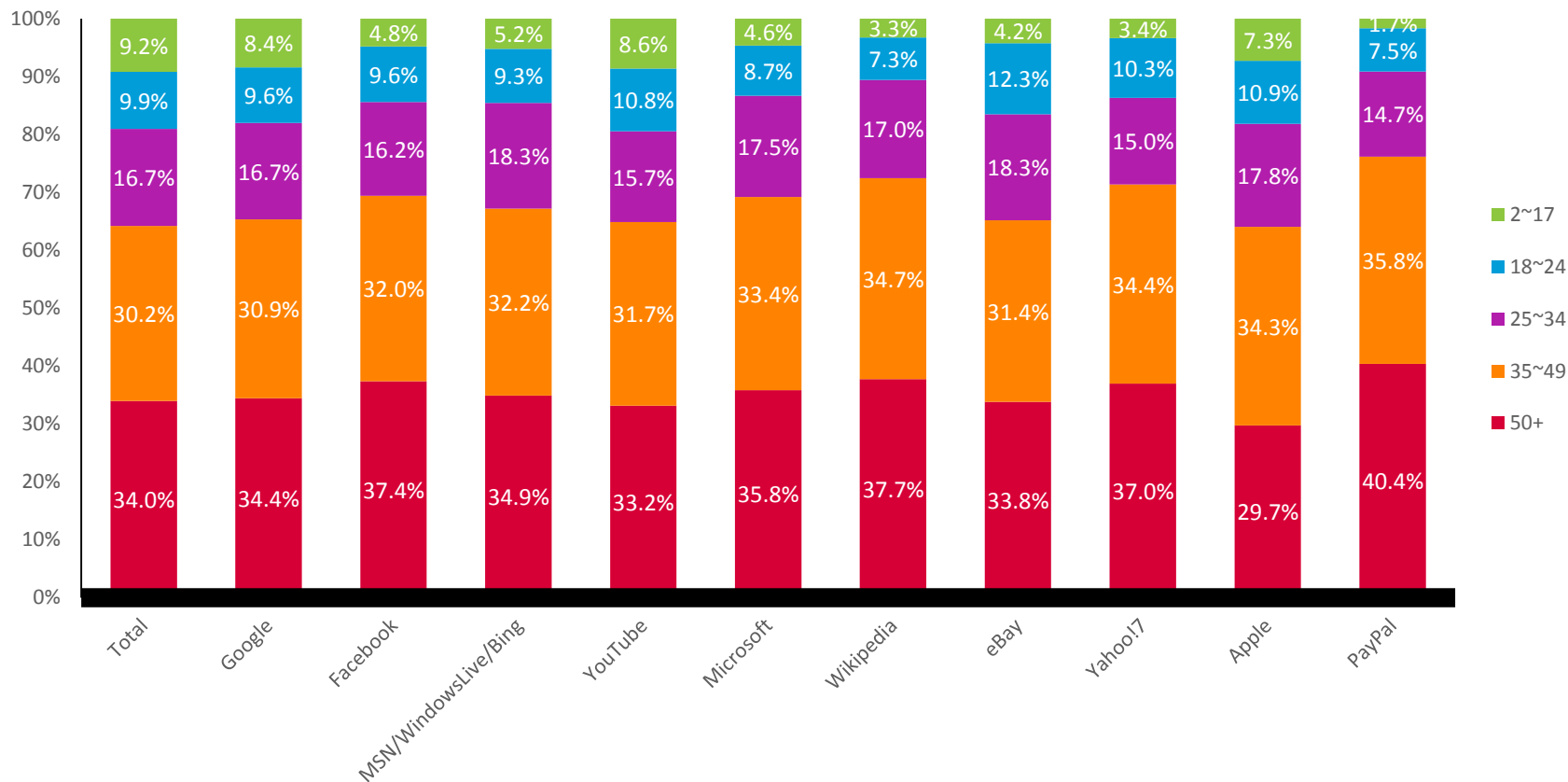
7 of the top 10 sites experienced an increase in engagement across all key metrics during June.

eBay gained one spot, climbing to sixth place, with Australians spending 5.5% more time browsing the site.

Microsoft experienced increases in all engagement metrics this month. Notably an additional 4.7% in time per person.

TOP 10 BRANDS BY AGE

Unique Audience (Surfing): June 2015

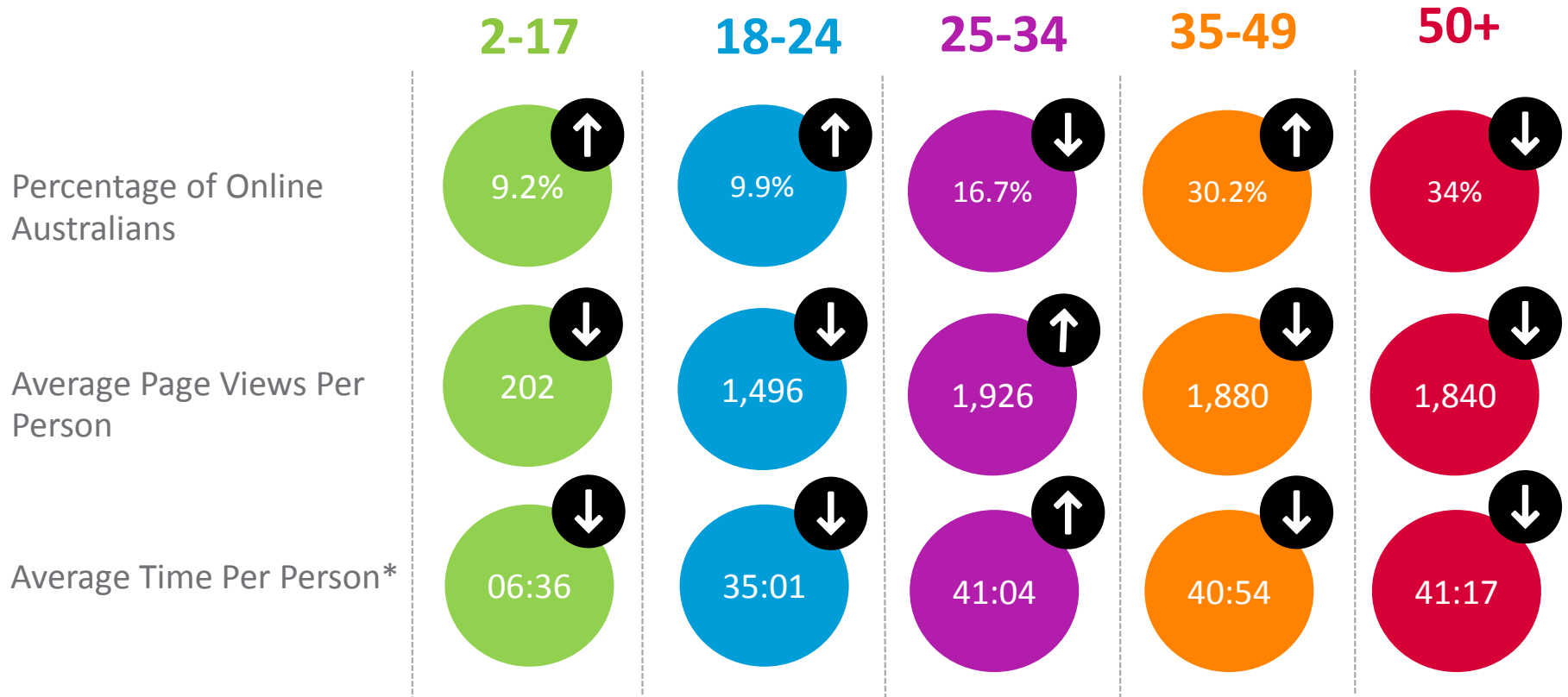


MSN/WindowsLive/Bing and eBay reported the heaviest skew towards Australians aged 25-34 at 18.3%.

eBay's audience also had the highest proportion of 18-24 year olds at 12.3%. Despite eBay having such a heavy skew towards the younger demographic, PayPal reports the heaviest skew towards older Australians with 3 in 4 members of their audience aged 35 and over.

HYBRID SURFING: DEMOGRAPHICS

The active online audience in Australia during June 2015 can be broken down as follows:



4 out of the 5 age groups experienced increases this month.
Despite a fall in unique audience, those aged 25-34 spent an additional 2 hours surfing this month.

↑ ↓ Indicates growth or decline based on the previous month

*HH:MM

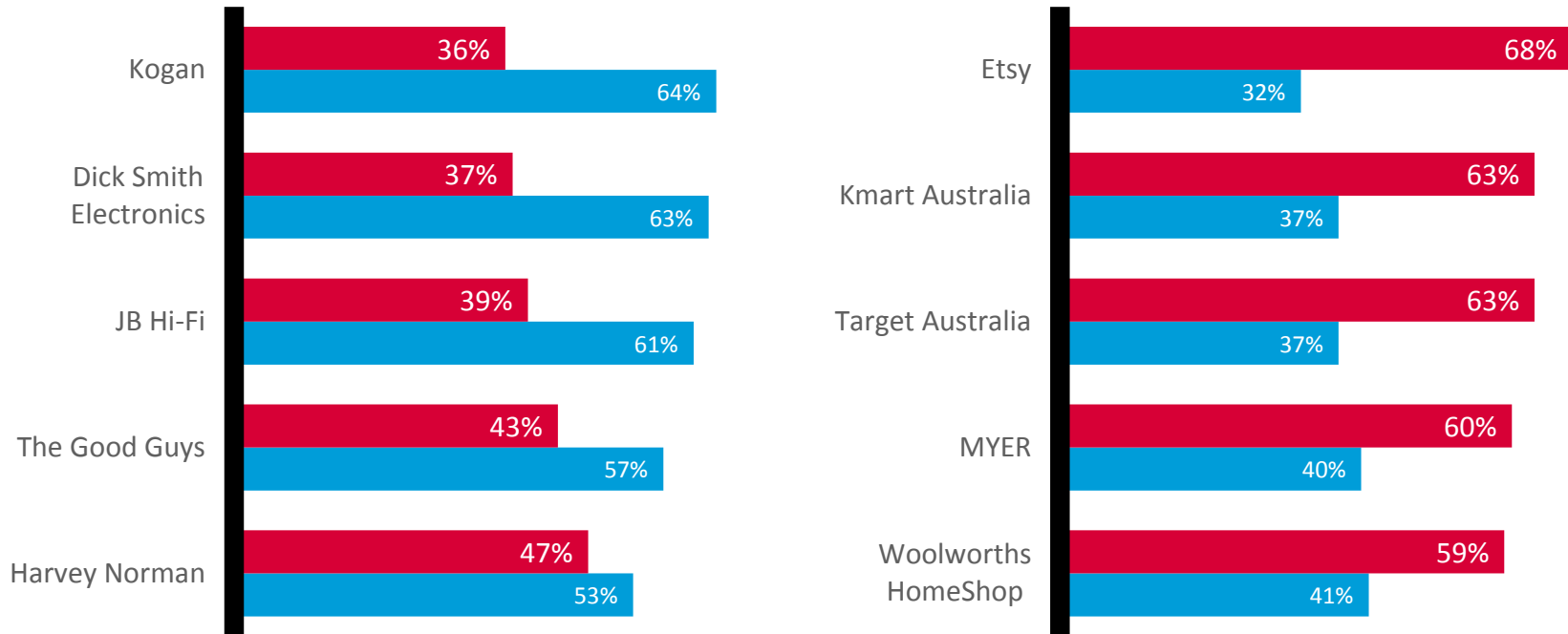
An abstract graphic on the left side of the slide. It features a series of concentric, curved lines that form a partial sphere or dome shape. The lines are colored in a gradient from purple to yellow. Several small, colored dots (yellow, pink, red) are placed on the surface of the sphere, with thin lines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

DEMOGRAPHIC SPOTLIGHT: SHOPPING HABITS BY GENDER

TOP 5 SITES BY GENDER SKEW

Unique Audience – Classifieds and Mass Merchandisers: June 2015

■ Female ■ Male



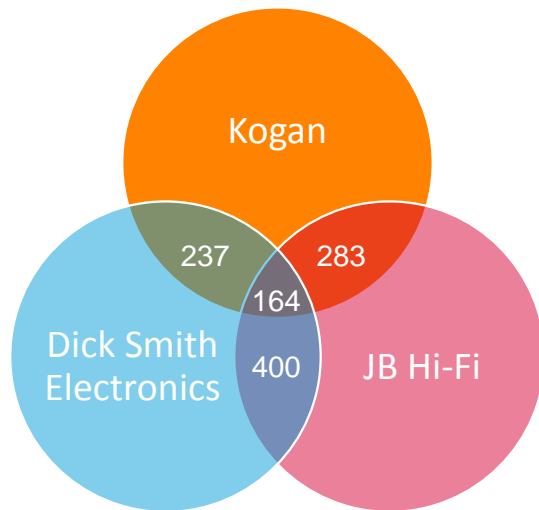
Looking at the commerce category by gender reveals that while department stores and home-wares have a high skew towards the female audience, tech sites report the highest skew towards males.

The majority of Australians visiting Kogan and Dick Smith Electronics are male at 64% and 63% respectively. Meanwhile, Etsy reports the highest skew towards women with 2 in 3 individuals browsing the site being female at 68%.

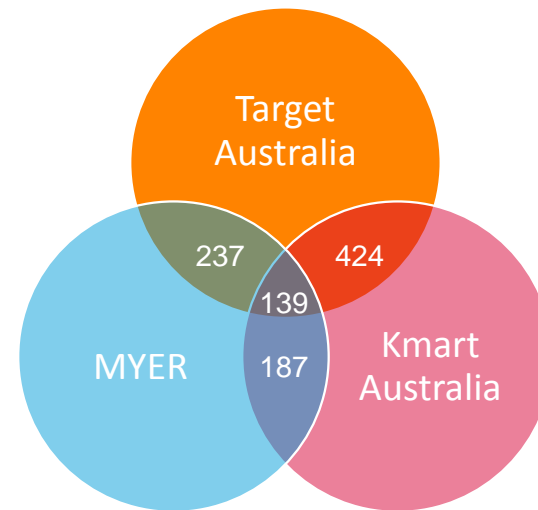
ECOMMERCE DUPLICATION BY GENDER

Unique Audience – Classifieds and Mass Merchandisers: June 2015

Male UA Duplication



Female UA Duplication



Selecting the top 3 tech ecommerce sites with the heaviest skew to males, 400,000 male Australians browse both Dick Smith and JB Hi-Fi, followed by 283,000 who browse both Kogan and JB Hi-Fi. Of the top 3 sites, 164,000 male Australians flick between all three.

On the other hand, out of the top 5 sites with the heaviest skew towards females, 3 are department store sites. 424,000 female Australians browse both Target Australia and Kmart Australia, followed by 237,000 females browsing both Target Australia and MYER. 139,000 females browse all three.

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 blue to red. Several small, colored dots (yellow, pink, red) are placed on the surface of the sphere, with thin lines extending from them towards the center of the sphere.

HIGHLIGHTS

NIELSEN ONLINE RATINGS: HYBRID STREAMING

HYBRID STREAMING KEY ONLINE STATISTICS

June 2015



3 billion streams watched.



6 billion minutes streamed.



7 hours and 42 minutes spent streaming per person.



13,653,000 people were actively streaming online.



Indicates growth or decline based on the previous month

HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

June 2015

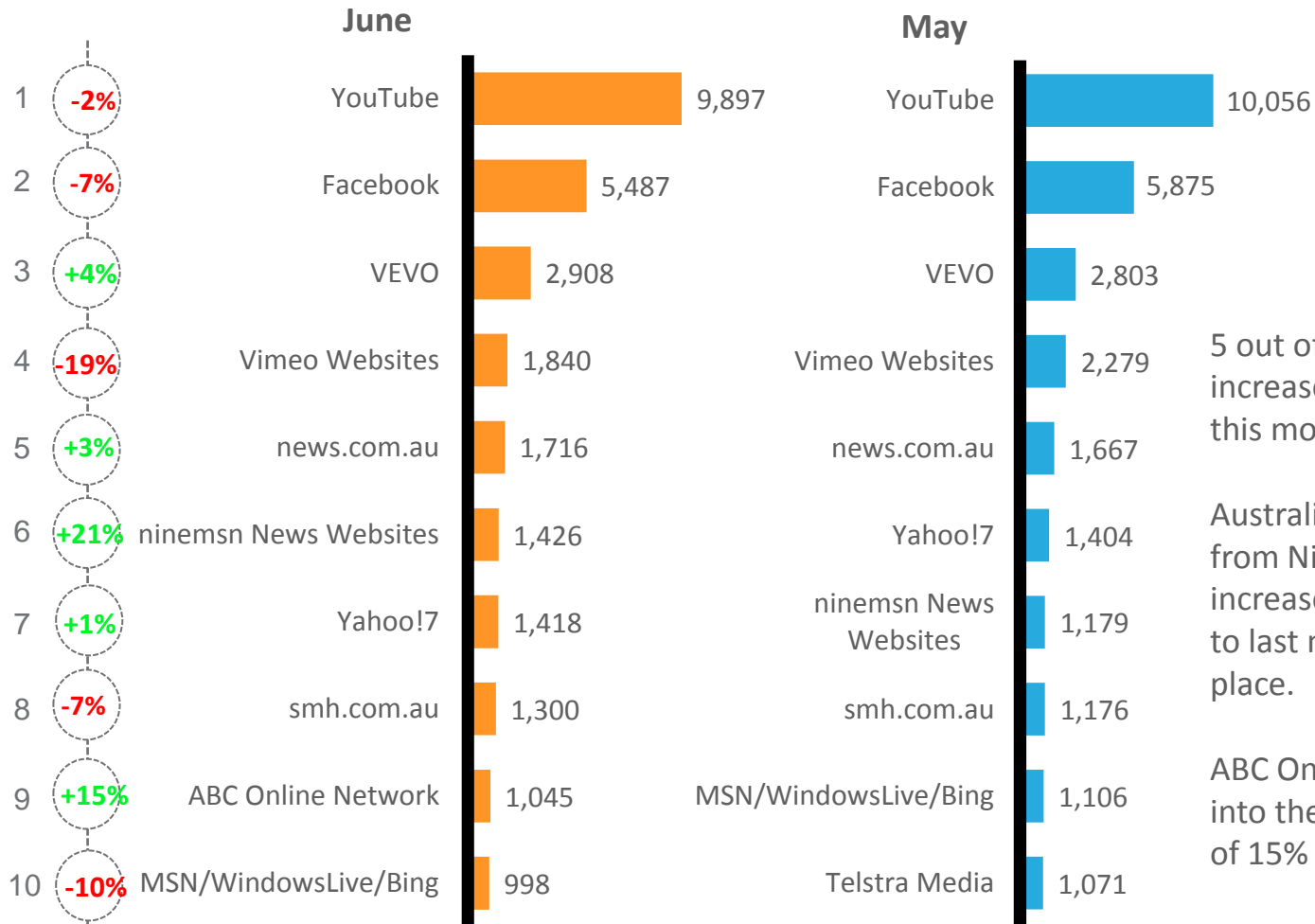
Unique Audience Rank	Brand	Unique Audience (000s)	Total Streams	Time Per Person (hh:mm:ss)
1	YouTube	9,897	1,803,059	04:46:27
2	Facebook	5,487	167,113	01:42:46
3	VEVO	2,908	117,075	00:45:08
4	Vimeo Websites	1,840	5,804	00:08:59
5	news.com.au	1,716	11,756	00:09:21
6	ninemsn News Websites	1,426	12,208	00:08:33
7	Yahoo!7	1,418	16,354	00:36:15
8	smh.com.au	1,300	3,964	00:05:57
9	ABC Online Network	1,045	4,335	01:29:16
10	MSN/WindowsLive/Bing	998	7,202	00:06:19

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, June 2015

TOP BRANDS COMPARISON – HYBRID STREAMING

June 2015, Unique Audience (000)



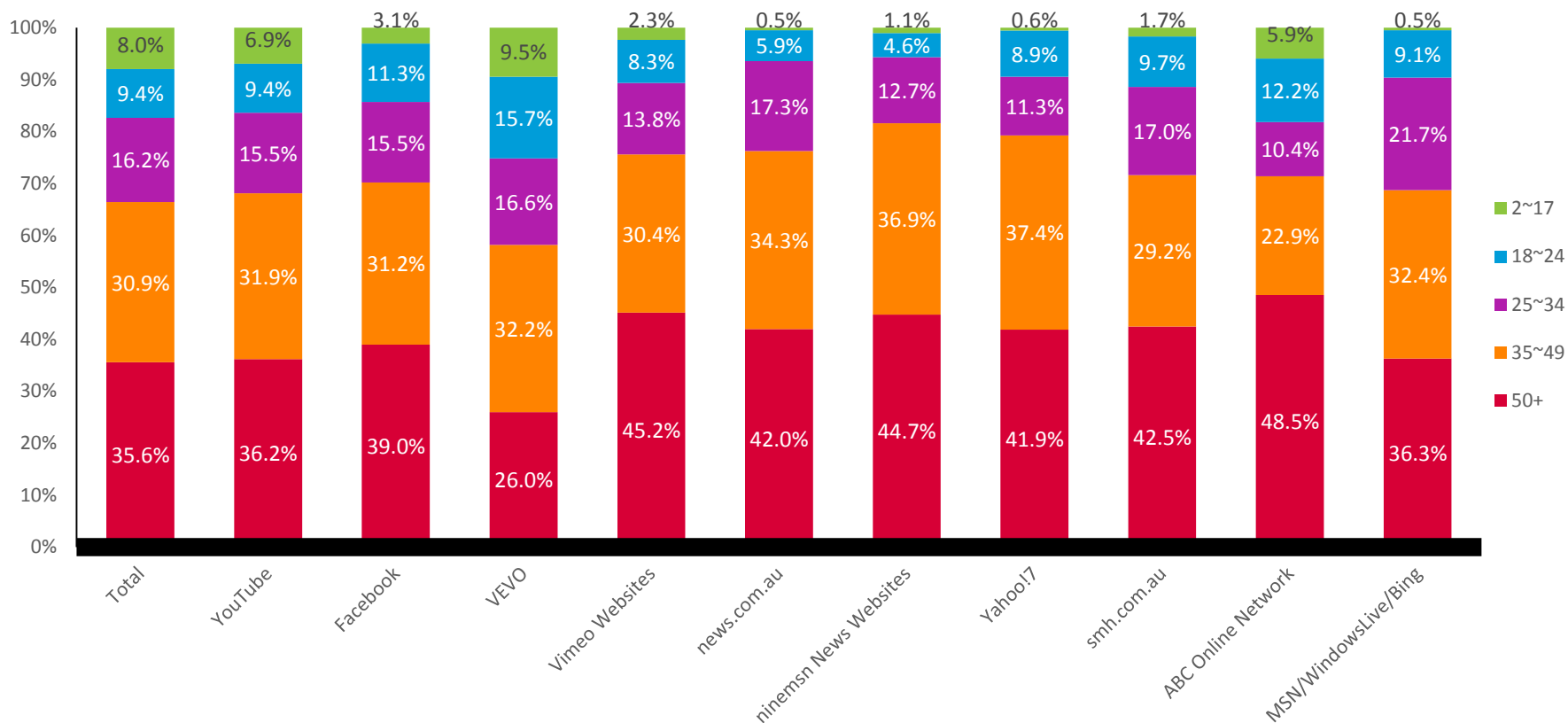
5 out of the top 10 sites reported increases in Unique Audience this month.

Australians streaming content from Ninemsn News Websites increased by 21% in comparison to last month, moving to 6th place.

ABC Online Network also edged into the top 10 with an increase of 15% in unique audience.

TOP 10 STREAMING BRANDS BY AGE

Unique Audience (Streaming): June 2015

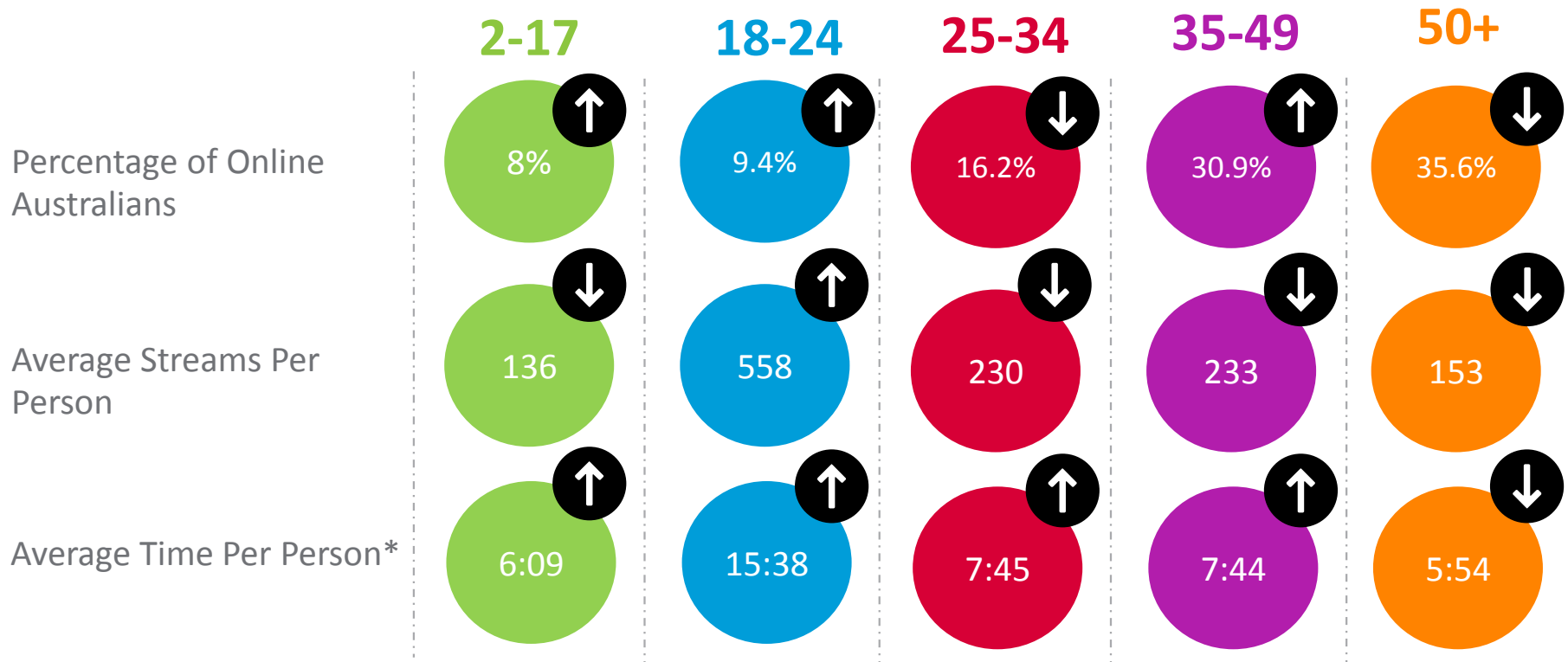


VEVO is heavily geared towards younger audiences, with the highest proportion of 2-24 year olds. In comparison, Ninemsn News Websites streaming figures indicate skews towards audiences aged 35 and over.

Meanwhile, ABC Online Networks streaming audience leans towards both ends of the spectrum, with 18% of their audience under the age of 18 and 49% aged 50+.

HYBRID STREAMING: DEMOGRAPHICS

June 2015



3 out of the 5 age groups experienced growth in unique audience composition this month. Australians aged 18-24 reported an extra 47 streams per person and additional 2 hours spent per person for this month, representing the heaviest streaming age group. In addition, Australians aged 2-17 and 25-34 streamed an extra 55 minutes this month compared to last month.

↑ ↓ Indicates growth or decline based on the previous month

*HH:MM

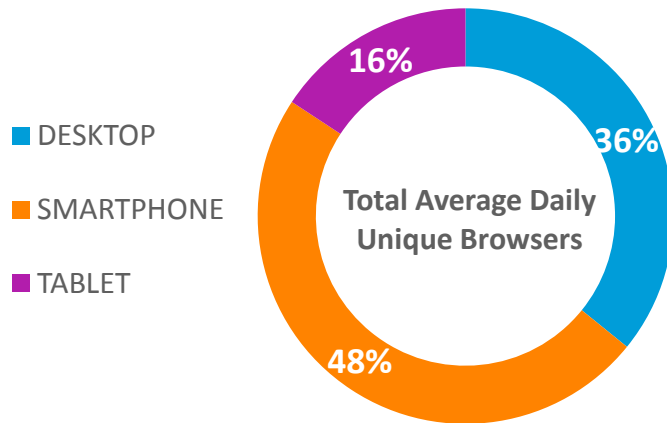
An abstract graphic on the left side of the slide. It features a series of concentric, curved lines that form a partial sphere or dome shape. The lines are colored in a spectrum of colors including red, orange, yellow, green, and blue. Several small, solid-colored dots (yellow, green, purple, red) are 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

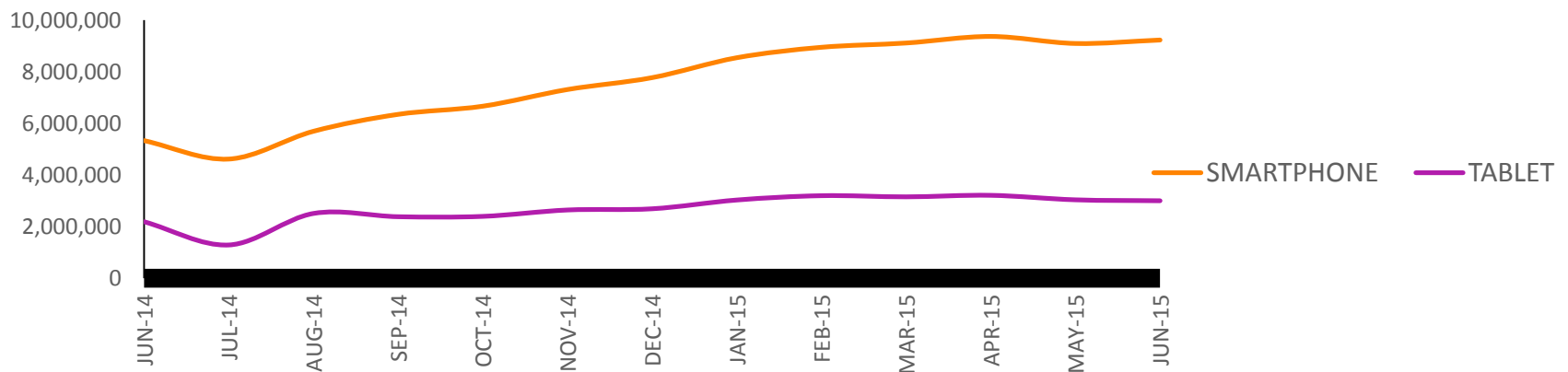
AUSTRALIANS BROWSE MORE ON PORTABLE DEVICES

June 2015 – Market Domain – Domestic Traffic



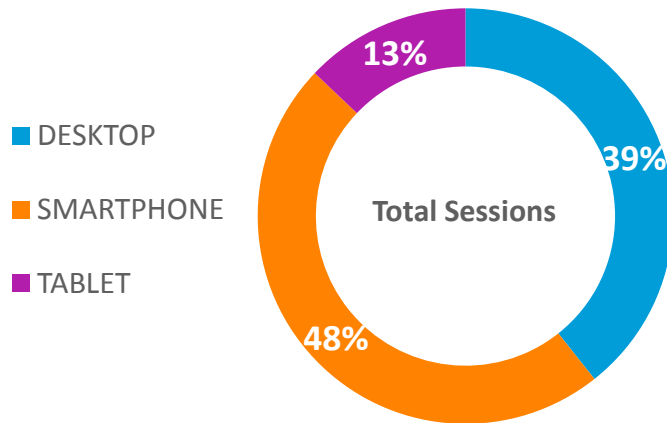
64% of total average daily unique browsers came from portable devices.

63% increase since June 2014 in total average daily unique browsers from portable devices



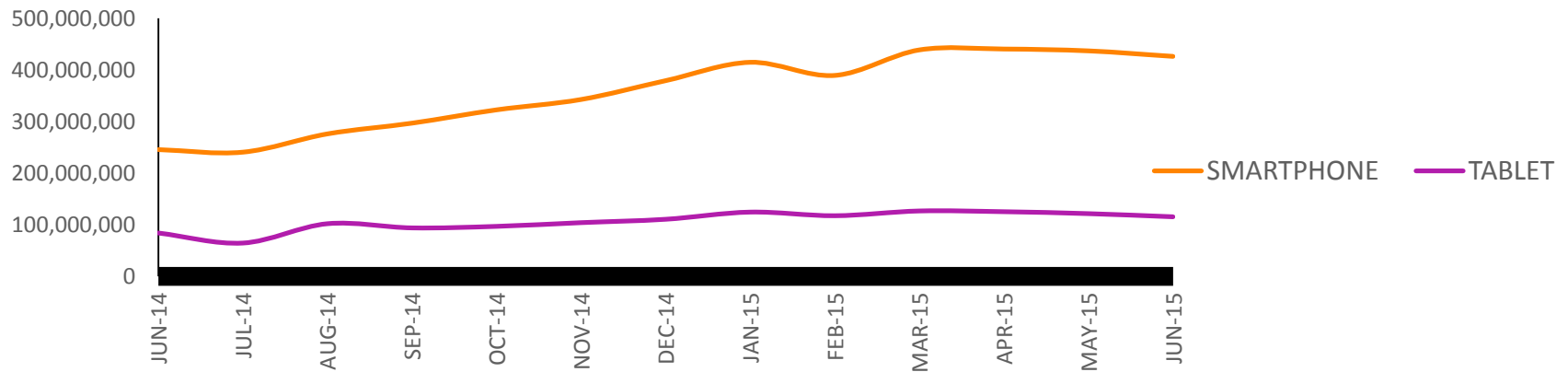
SESSIONS ON PORTABLE DEVICES HAS GROWN 76% IN A YEAR

June 2015 – Market Domain – Domestic Traffic



61% of total online sessions came from portable devices

64% increase since June 2014 in total online sessions from portable devices



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 blue to red. 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 data points or connections.

GENERAL UPDATES FOR THIS MONTH:

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 (red, green, blue, yellow). Several colored dots (yellow, purple, red) are placed on the surface of the sphere, with thin lines extending from them towards the center or outwards.

NIELSEN TWITTER TV RATINGS

SAD NEWS FOR THE BLUES! QUEENSLAND VICTORY ON TWITTER AND ON FIELD

STATE OF ORIGIN 2015

NIELSEN TWITTER TV RATINGS (AUSTRALIA)

					
	UNIQUE AUTHORS	TWEETS	IMPRESSIONS	UNIQUE AUDIENCE	
GAME 1 27 May	NINE	17.2K	49.7K	5.2M	220.3K
GAME 2 17 June	NINE	19.8K	60.4K	6.4M	220.2K
GAME 3 8 July	NINE	22.3K	69.9K	6.7M	227.9K

The 2015 State of Origin will go down as one of the most enthralling series so far with sports fans around Australia jumping on Twitter to share the biggest moments.

With 180,000 Tweets being viewed over 18 million times, fans took to second screens to celebrate tries, comment on calls, key moments and crunching tackles as the banter unfolded in real-time.

Read more [here!](#)

NIelsen TWITTER TV RATINGS

Nielsen Twitter TV Ratings - June, 2015
Monthly Top Five - Non Sport



Rank	Network	Program	Date	Unique Audience	Impressions	Unique Authors	Tweets
1	SHOWCASE	Game of Thrones (finale)	15/06/15	119.7K	437.7K	7.9K	15.0K
2	ABC	The Killing Season (Part 2)	16/06/15	98.5K	2.4M	4.2K	16.8K
3	ABC	The Killing Season (Part 1)	09/06/15	94.7K	2.3M	4.5K	17.5K
4	ABC	Q&A (Alan Tudge, Tanya Plibersek)	29/06/15	94.6K	4.9M	9.9K	59.3K
5	ABC	The Killing Season (Part 3)	23/06/15	88.5K	2.7M	4.9K	20.7K

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. Non-sport includes live/new episodes only.

NIELSEN TWITTER TV RATINGS

Nielsen Twitter TV Ratings - June, 2015
Monthly Top Five - Sport



Rank	Network	Program	Date	Unique Audience	Impressions	Unique Authors	Tweets
1	NINE	State of Origin Game 2 NSW v QLD	17/06/15	220.2K	6.4M	19.8K	60.4K
2	ESPN	NBA Finals Warriors Cavaliers v	17/06/15	133.9K	996.9K	5.8K	14.8K
3	SBS	FIFA Women's World Cup Quarter Final Australia v Japan	28/06/15	128.1K	1.2M	3.8K	9.8K
4	SBS	FIFA Women's World Cup USA v Australia	09/06/15	123.5K	1.1M	3.7K	9.5K
5	SBS	FIFA Women's World Cup Australia v Sweden	17/06/15	122.6K	1.1M	3.0K	7.5K

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.



nielsen
.....

AN UNCOMMON SENSE
OF THE CONSUMER™

CONTACT

careau@nielsen.com

www.nielsen.com/au/

(02) 8873 7000