



nielsen

# THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

DECEMBER 2015

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# STATE OF THE ONLINE LANDSCAPE

December 2015

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

The online landscape in December saw Australians spend 30 hours online over 60 sessions with 33 billion minutes spent online.

Latest Nielsen insights:

- **NIELSEN TWITTER TV RATINGS:** Australia vs West Indies Cricket matches dominated the top 5 sports Twitter TV Ratings accompanied by the UFC 194 main card match (Aldo vs McGregor) securing the third position in December
- **PATHMATICS AND NIELSEN'S CUTTING-EDGE ALLIANCE:** Almost half of Australia's digital ad inventory is bought programmatically – higher than the U.S.
- **TUNING IN TO THE AUSTRALIAN TRAVELER:** Commercial radio listeners can be segmented into three distinctive travel groups, excluding stay at home listeners
- **OVER 40 AND SPENDING FREELY:** Analysis using new partners, Veda and Nielsen shows Australians over 40 are big spenders across a range of categories

If you'd like to know more about any of the information presented within this report, please contact your Nielsen Account Manager directly or email [careau@nielsen.com](mailto:careau@nielsen.com).





# HIGHLIGHTS

## NIELSEN ONLINE RATINGS: HYBRID SURFING

# AT A GLANCE: THE ONLINE LANDSCAPE

December 2015



**33 billion** minutes spent.



**30 hours** spent online, across **60 sessions** per person.



**18,312,000 people** were actively surfing online.



Indicates growth or decline based on the previous month

# TOP 10 BRANDS AND THEIR ENGAGEMENT

December 2015

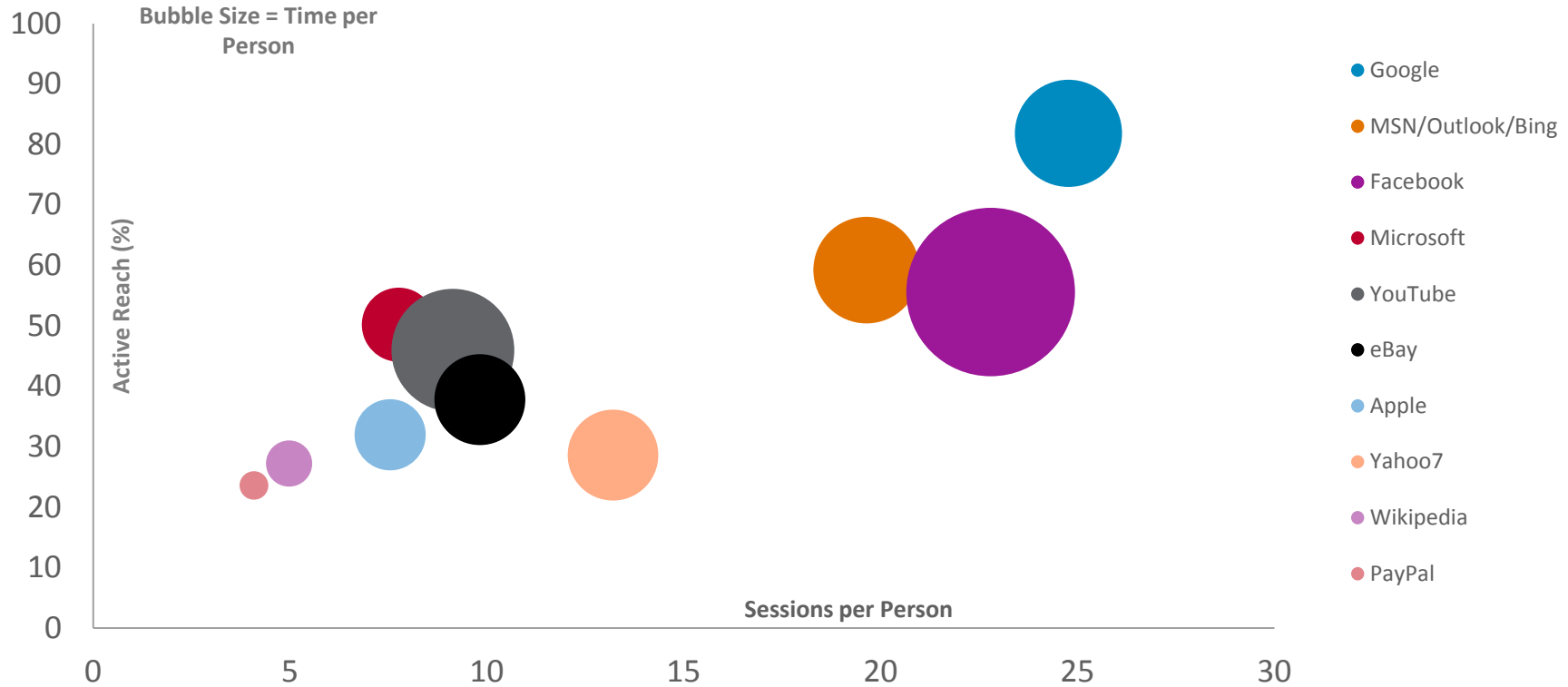
Unique Audience Rank	Brands	Unique Audience (000s)	Active Reach (%)	Sessions Per Person	Time Per Person (hh:mm:ss)
1	Google	14,985	81.84	24.77	02:13:50
2	MSN/Outlook/Bing	10,843	59.21	19.64	02:12:23
3	Facebook	10,175	55.57	22.79	05:32:03
4	Microsoft	9,187	50.17	7.76	01:03:59
5	YouTube	8,409	45.92	9.13	02:56:18
6	eBay	6,916	37.77	9.82	01:36:33
7	Apple	5,852	31.96	7.54	00:58:48
8	Yahoo7	5,236	28.59	13.20	01:36:01
9	Wikipedia	4,983	27.21	4.97	00:24:50
10	PayPal	4,317	23.57	4.08	00:09:39

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, December 2015

# TOP 10 BRANDS AND THEIR ENGAGEMENT

December 2015

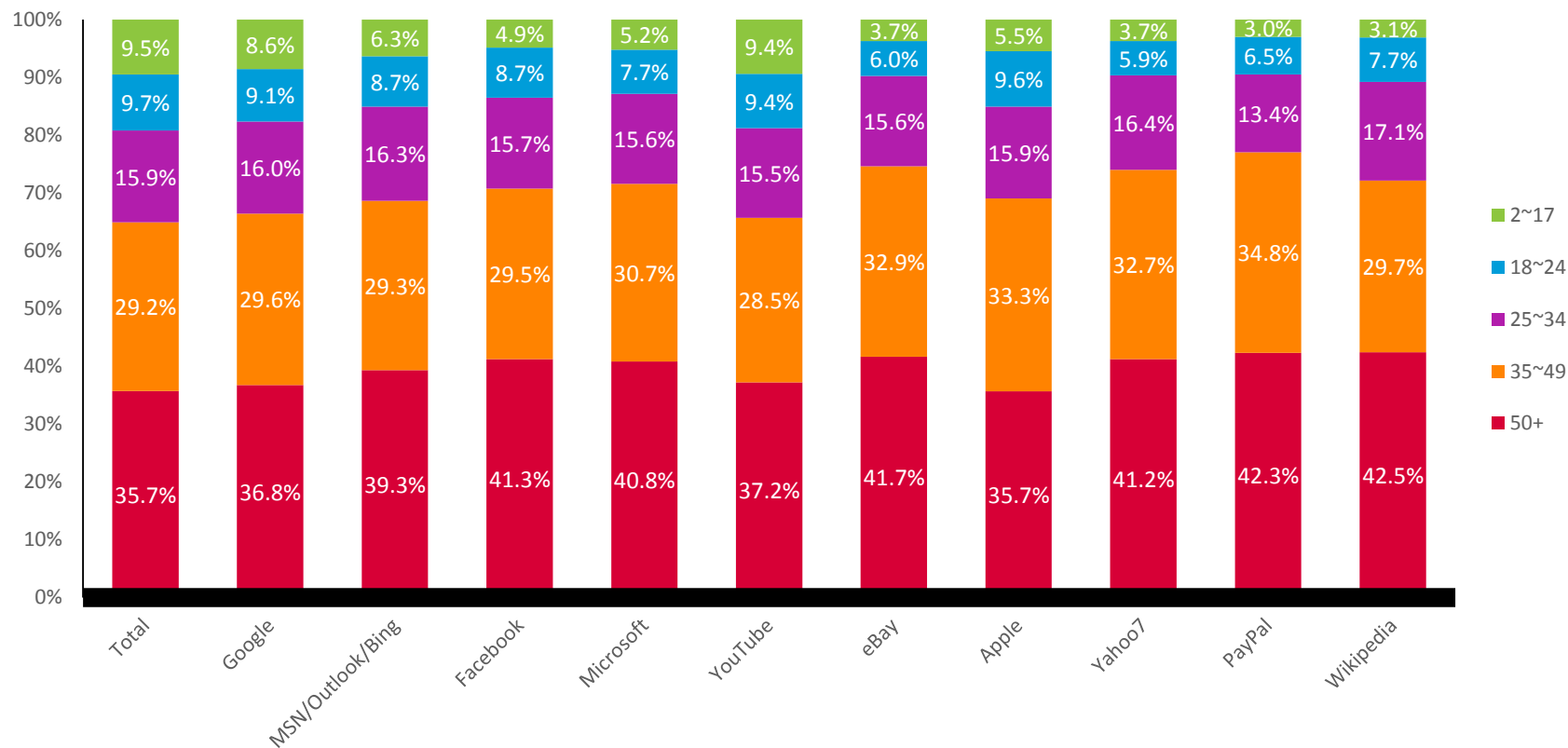


Five out of the top ten sites experienced an increase in active reach (%) month-on-month in December.

MSN/Outlook/Bing experienced an increase of 28.6% in sessions per person and 14.3% in active reach (%) – ranking second in the top 10 brands for December. Meanwhile, Apple saw growth in time per person of 3.0% and an additional 4.2% in active reach (%).

# TOP 10 BRANDS BY AGE

Unique Audience (Surfing): December 2015

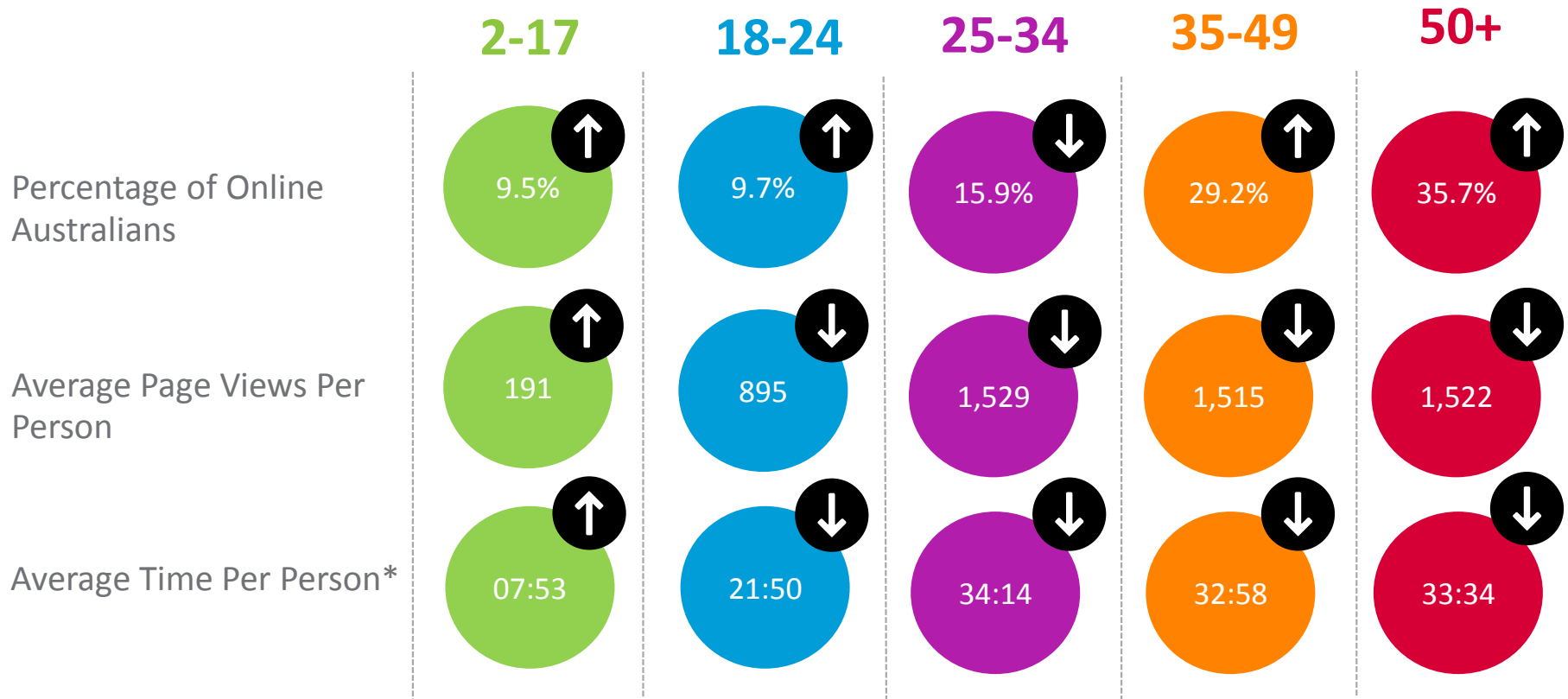


PayPal entered the top 10 in December 2015, holding the highest skew towards those aged 50+ at 42.3%. Over one third of Apple's audience was aged between 35-49 at 33.3% having the second highest skew for this age group.

YouTube and Apple captivated young audiences with Apple having the heaviest skew towards 18-24 year olds at 9.6% and YouTube having the heaviest skew towards 2-17 year olds at 9.4%.

# HYBRID SURFING: DEMOGRAPHICS

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



Four out of the five age groups experienced increases this month. Time per person for Australians aged 2-17 years old have increased by over an hour. The composition of unique audience shifted to Australians aged 50+.

↑ ↓ Indicates growth or decline based on the previous month

\*HH:MM

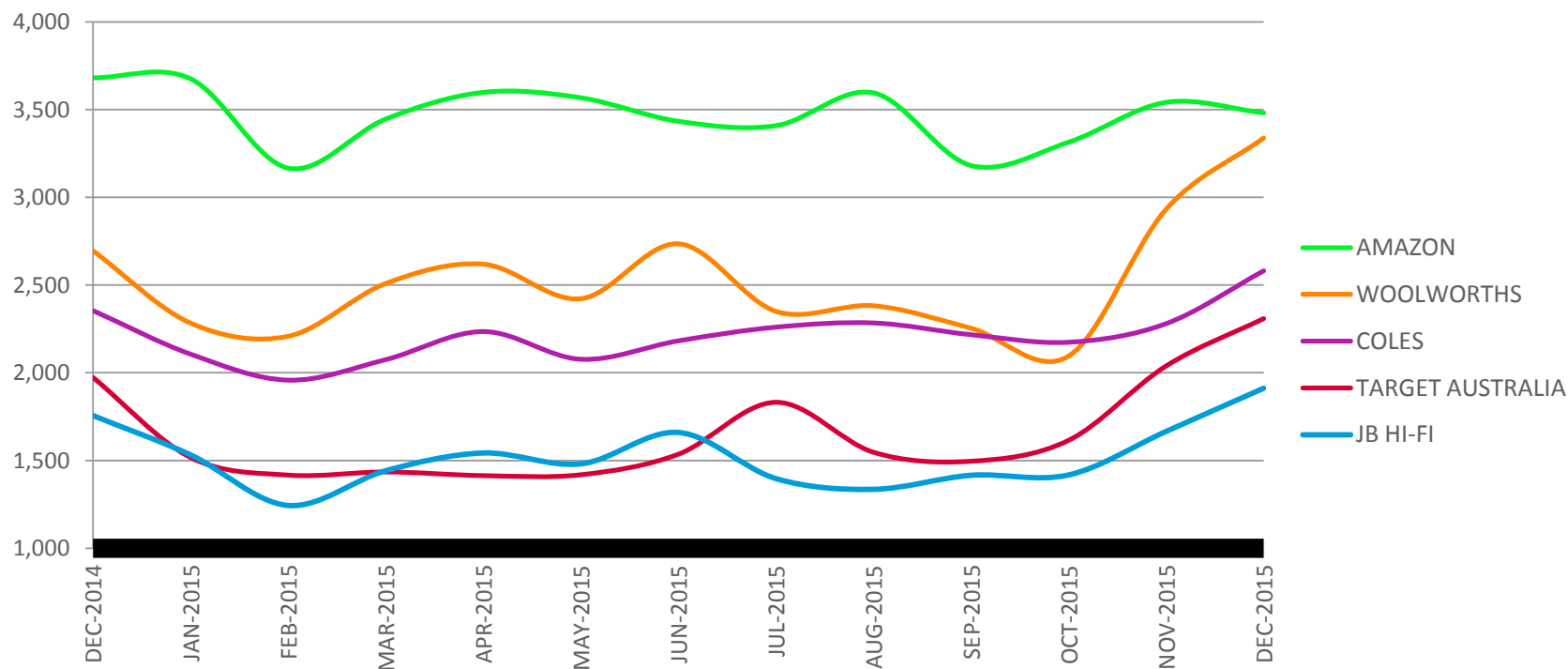




# CATEGORY SPOTLIGHT: MASS MERCHANDISER

# TOP 5 MASS MERCHANDISER SITES

Unique Audience (000) : December 2014 – December 2015



Four out the top five mass merchant retailer websites recorded double digit gains in unique visitors during December 2015 compared to November 2015.

Woolworths and Coles recorded the highest number of unique visitors to their websites for a local retailer – behind global ecommerce giant, Amazon – and recorded growth of 14% and 13% respectively. [More here](#)

# HIGHLIGHTS

## NIELSEN ONLINE RATINGS: HYBRID STREAMING

# HYBRID STREAMING KEY ONLINE STATISTICS

December 2015



**4.0 billion** streams watched.



**7 billion** minutes streamed.



**8 hours and 30 minutes** spent streaming per person.



**12,789,000** people were actively streaming online.



Indicates growth or decline based on the previous month

# HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

December 2015

Unique Audience Rank	Brand	Unique Audience (000s)	Total Streams (000s)	Time Per Person (hh:mm:ss)
1	YouTube	7,097	1,967,325	08:08:33
2	Facebook	4,987	1,046,875	01:26:23
3	VEVO	2,152	166,422	02:11:18
4	news.com.au	1,790	14,423	00:07:04
5	Vimeo Websites	1,395	16,737	00:08:18
6	MSN/Outlook/Bing	1,122	6,998	00:04:28
7	ninemsn News Websites	1,122	17,452	00:09:26
8	smh.com.au	1,031	4,828	00:05:13
9	Yahoo7	969	13,985	00:30:15
10	ABC Online Network	796	7,172	01:36:05

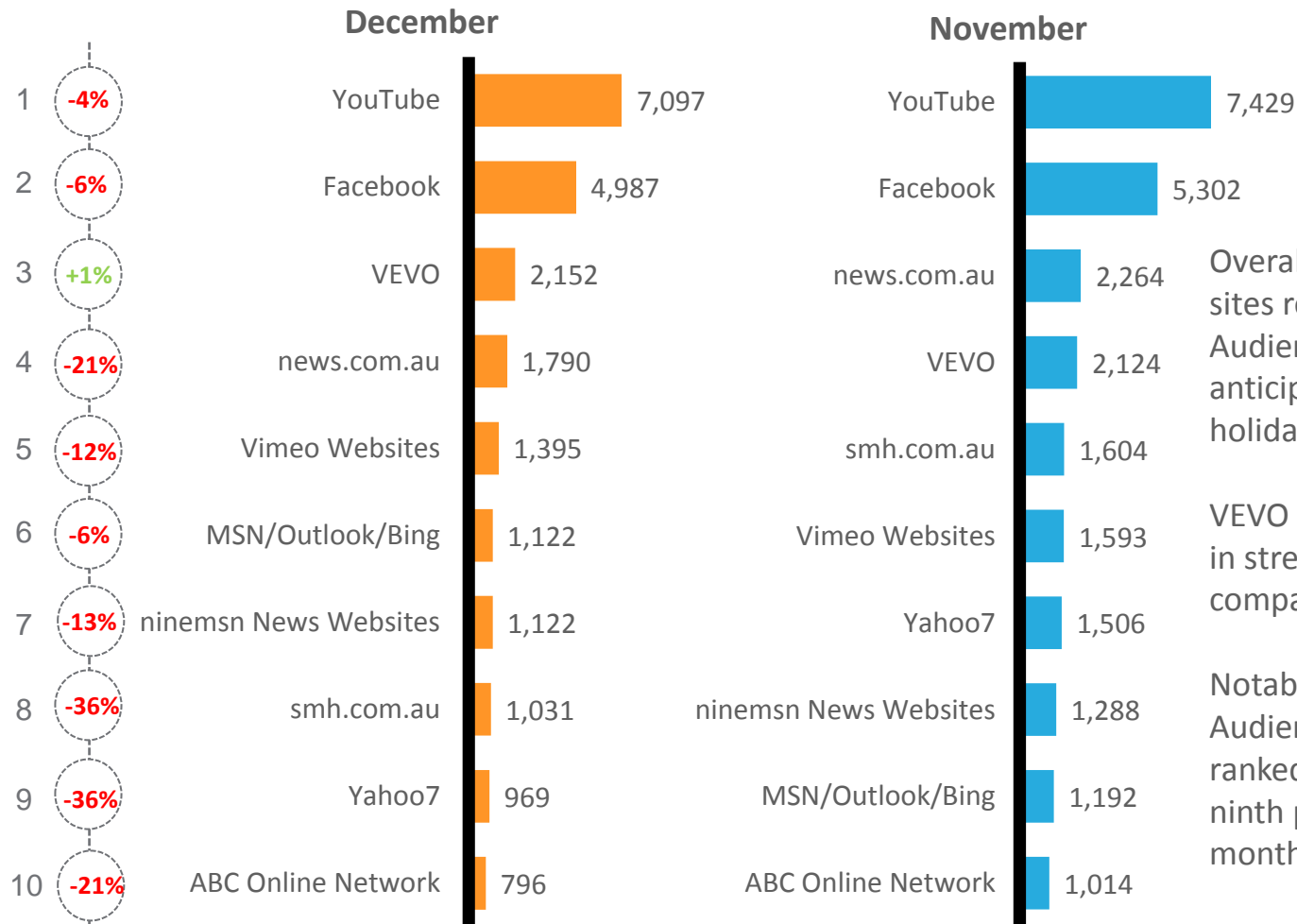
Note: In December 2015, Facebook changed the way that it serves video. Nielsen is investigating the way these streams are served to best measure them, however streams for Facebook are overstated at this time. No other metrics for Facebook are affected and this **only impacts December 2015 data**.

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, December 2015

# TOP BRANDS COMPARISON – HYBRID STREAMING

December 2015, Unique Audience (000s)



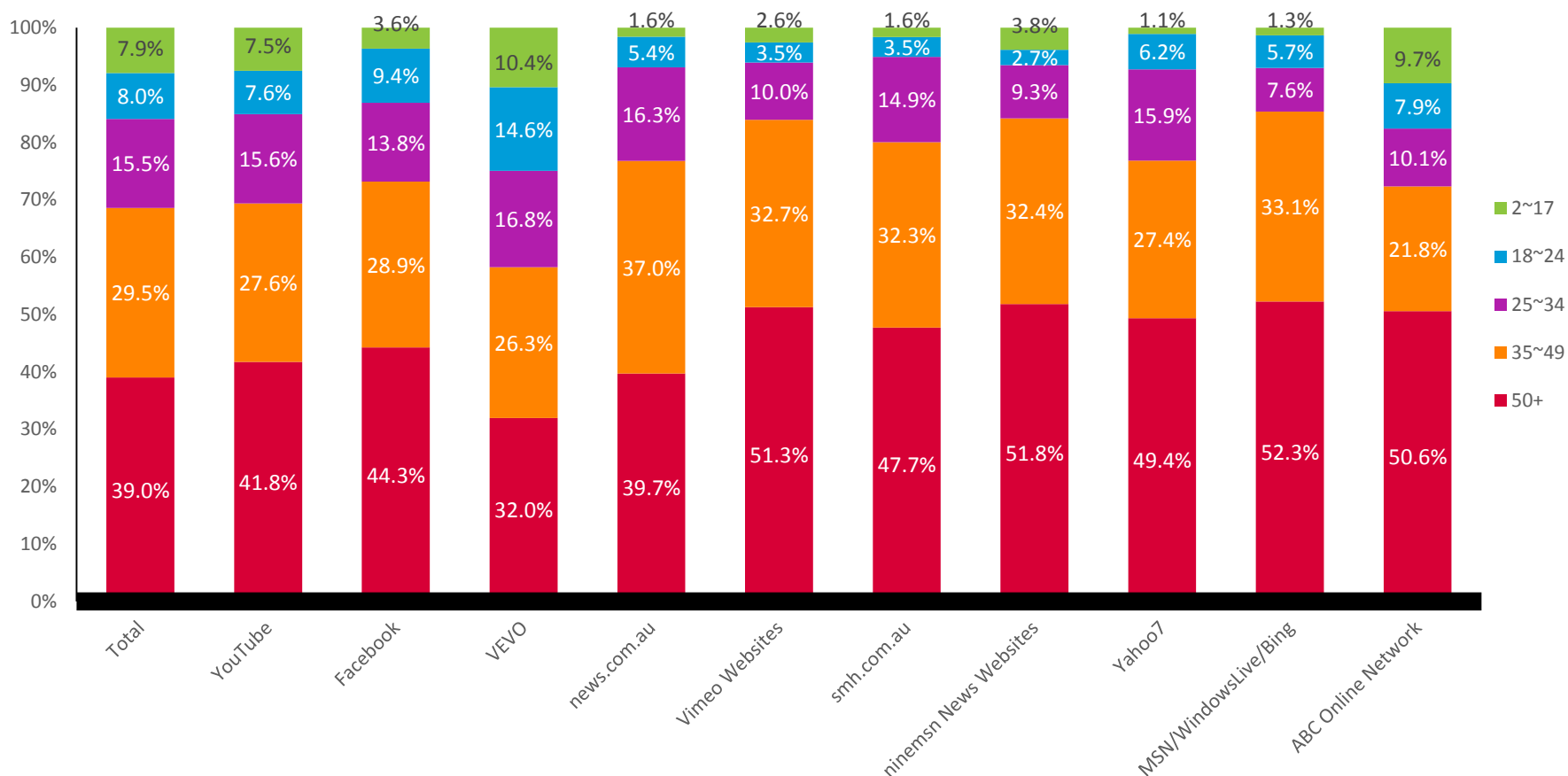
Overall, majority of the top 10 sites reported a dip in Unique Audience this month, as anticipated during the December holiday period.

VEVO experienced a 1% increase in streaming Australians in comparison to last month.

Notably, despite a dip in Unique Audience - MSN/Outlook/Bing ranked sixth in December from ninth position in the previous month.

# TOP 10 STREAMING BRANDS BY AGE

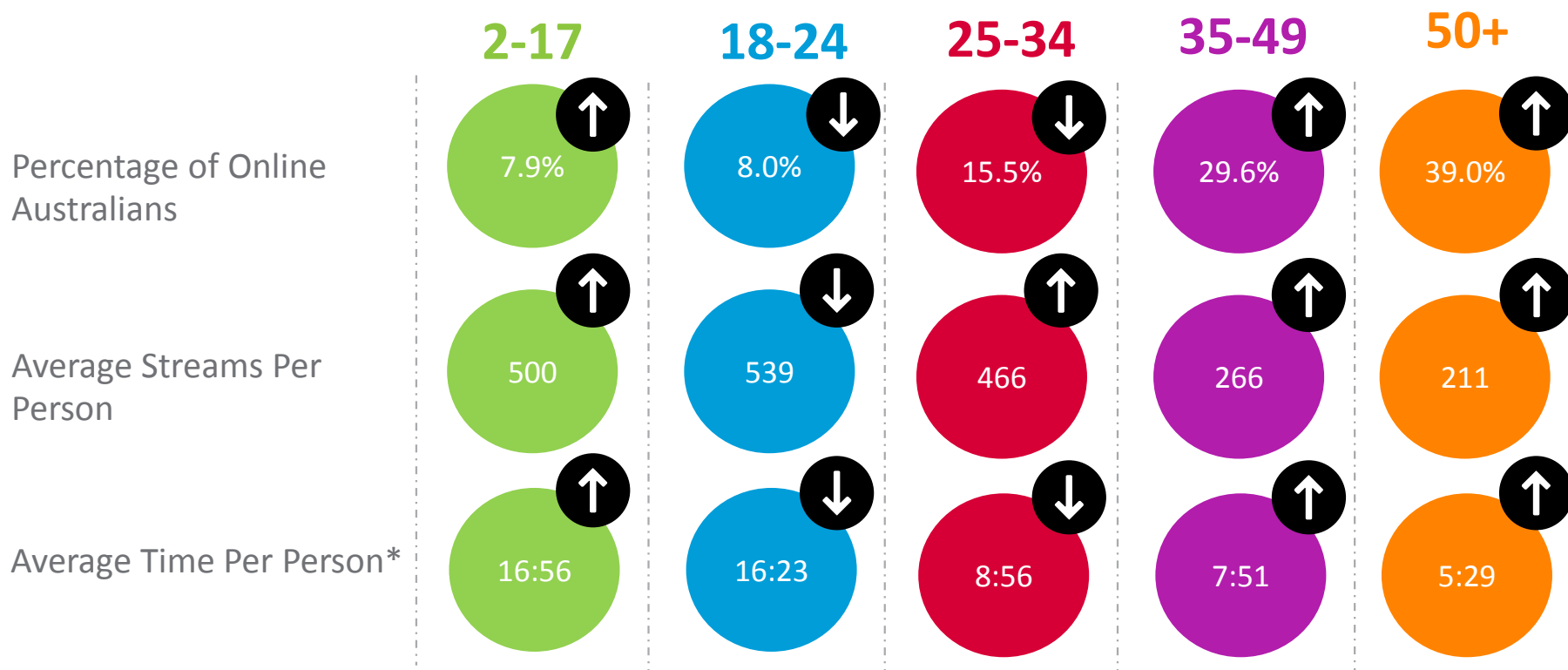
Unique Audience (Streaming): December 2015



Ninensn News Websites continues to have the highest proportion of streaming Australians aged over 50, with almost half their audience falling into that age group. VEVO reported the highest skew towards those aged between 18-24 years old at 14.6%. Three in four Australians who stream on Yahoo7 are above the age of 35.

# HYBRID STREAMING: DEMOGRAPHICS

December 2015



Age groups 2-17 and 35+ experienced increases in time per person this month.

Streams per person for the age group 2-17 experienced growth with an additional 140 streams per person, and an increase of 6 hours average time per person.

↑ ↓ Indicates growth or decline based on the previous month

\*HH:MM



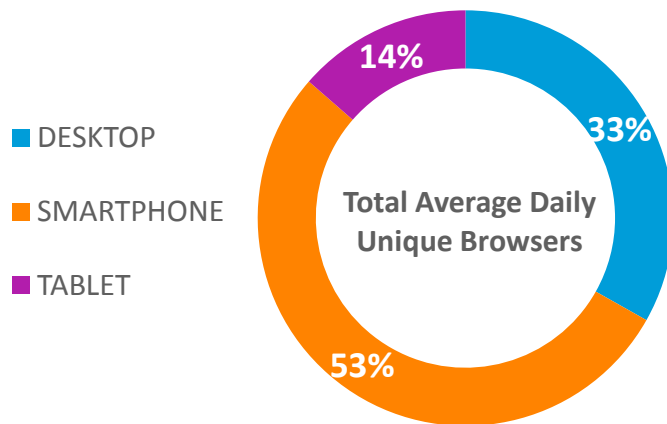


# DEVICE HIGHLIGHTS

## NIELSEN ONLINE RATINGS: MARKET INTELLIGENCE

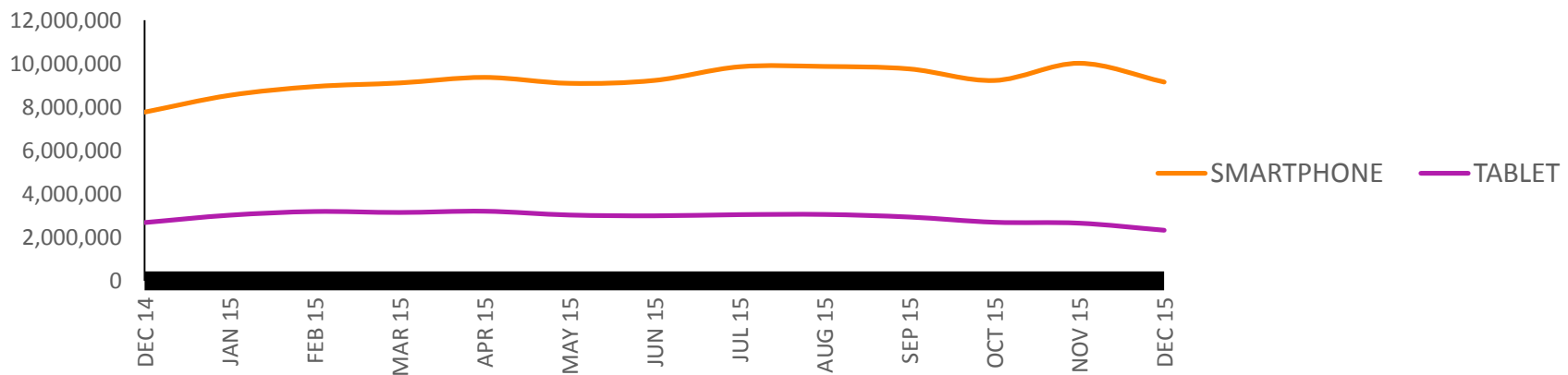
# SITES ARE BROWSED MORE ON PORTABLE DEVICES

December 2015 – Market Domain – Domestic Traffic



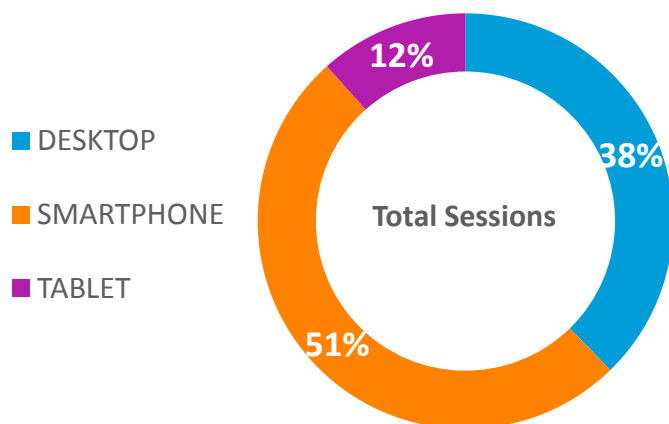
**67%** of total average daily unique browsers came from portable devices.

**10%** increase since December 2014 in total average daily unique browsers from portable devices



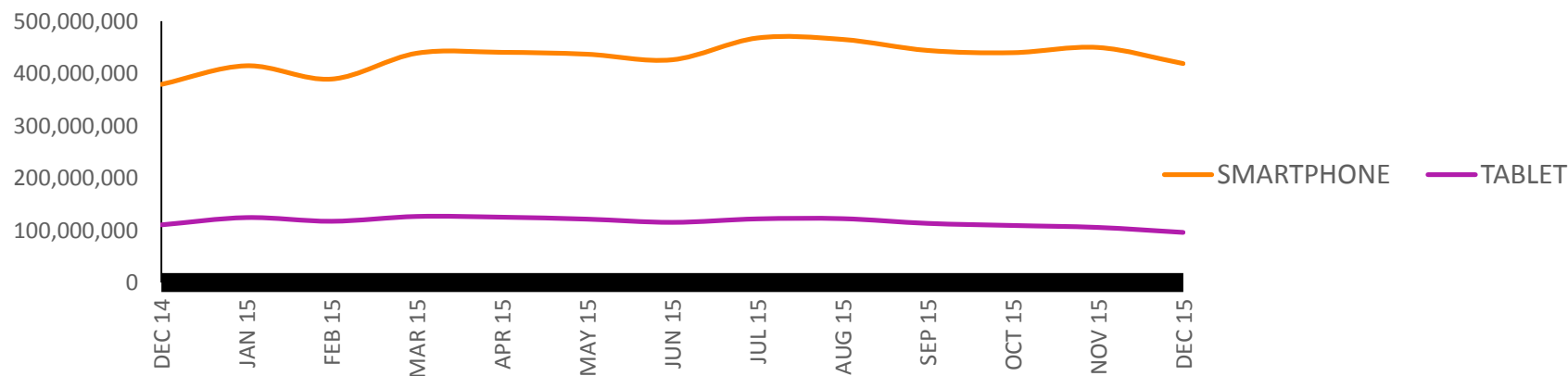
# SESSIONS ON PORTABLE DEVICES HAS GROWN 5% IN A YEAR

December 2015 – Market Domain – Domestic Traffic



**62%** of total online sessions came from portable devices

**5%** increase since December 2014 in total online sessions from portable devices



# LATEST NIELSEN INSIGHTS...

# NIELSEN TWITTER TV RATINGS

Nielsen Twitter TV Ratings - December, 2015

Monthly Top Five - Sport



Rank	Network	Program	Date	Unique Audience	Impressions
1	NINE	Second Test Australia v West Indies Day 1	26/12/15	158.7K	1.9M
2	NINE	Second Test Australia v West Indies Day 2	27/12/15	137.6K	1.5M
3	MAINEVENT	UFC 194 Main Card Aldo v McGregor	13/12/15	126.2K	842.6K
4	NINE	First Test Australia v West Indies Day 1	10/12/15	124.8K	1.5M
5	NINE	First Test Australia v West Indies Day 3	12/12/15	121.0K	1.3M

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.

# ALMOST HALF OF AUSTRALIA'S DIGITAL AD INVENTORY IS BOUGHT PROGRAMMATICALLY – HIGHER THAN THE U.S.

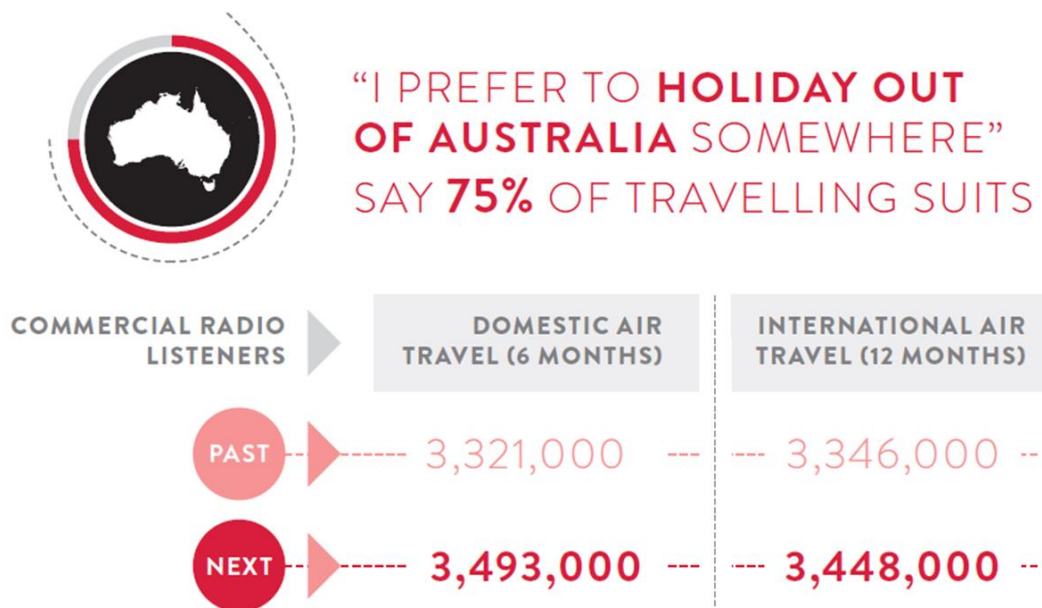
Australian advertisers are buying 45% of digital advertising inventory through programmatic services, according to new data from Pathmatics and Nielsen. Pathmatics and Nielsen launched a new alliance last week, delivering device-level insights into Australia's digital ad market.

	AU PUBLISHER DIRECT	U.S. PUBLISHER DIRECT	AU PRO-GRAMMATIC	U.S. PRO-GRAMMATIC	AU AD NETWORK	U.S. AD NETWORK
DESKTOP	33%	40%	46%	35%	21%	25%
MOBILE	34%	41%	40%	33%	27%	26%
TABLET	31%	37%	48%	39%	20%	23%
VIDEO	51%	72%	32%	15%	17%	13%

[READ FULL STORY HERE](#)

# TUNING IN TO THE AUSTRALIAN TRAVELER

Commercial radio listeners can be segmented into three distinctive travel groups, excluding stay at home listeners. From “Travelling Suits” on business, to “OS Adventurers” and “Local Leisure Seekers” exploring the world and Australia, radio audiences are varied and their preferences diverse.



[READ FULL STORY HERE](#)

# OVER 40 AND SPENDING FREELY

Nielsen recently announced an exciting partnership with leading provider of financial data and analytics, Veda, to provide the industry with better targeting tools for marketing campaigns. Some of our first integrated Veda metrics are out, and there are some compelling insights.

Analysis using both Veda and Nielsen information shows the big prizes for the marketing dollar. Australians over 40 are big spenders across a range of categories:

- 43% say their next car is going to be 'new'
- 49% say they are going to undertake home renovations in the next 12 months
- 24% spent over \$150 inside a shopping centre in the past week
- 41% say quality is more important than price when they're buying groceries/FMCG goods
- 46% are planning on travelling domestically or internationally in the next 6-12 months.

With almost 60% of the total Australian population aged 40+, they're a huge prize for advertisers and marketers that can't be ignored.

[READ FULL STORY HERE](#)





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AN UNCOMMON SENSE  
OF THE CONSUMER™

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