nielsen

THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

JANUARY 2016

STATE OF THE ONLINE LANDSCAPE

January 2016

Welcome to the January 2016 edition of **Nielsen's Online Landscape Review**.

The online landscape in January saw Australians spend 32 hours online over 62 sessions with 36 billion minutes spent online.

Latest Nielsen information:

- **NIELSEN TWITTER TV RATINGS:** The 2016 Australian Open matches dominated the top 5 sports Twitter TV Ratings which was aired by the channel seven network.

- **SUPER BOWL SOCIAL TV FACTS:** Check out the insights behind the golden anniversary Super Bowl game

- **UPDATES ON YOUR DIGITAL AUDIENCE MEASUREMENT ROADMAP**: Get the latest updates on the launch of Digital Ratings (Monthly) and Digital Content Ratings

- **NIELSEN ONLINE RATINGS** – December 2015 overstatement of digital surfing volumetrics for some Fairfax Media sites

- **GROCERY, PHARMACY & CONVENIENCE GROWTH:** Get the latest Homescan™ insights for the Australian retail market

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.

Note: Link to Nielsen's Global Trust in Ad Story has been removed from original version of this report

HIGHLIGHTS
NIELSEN ONLINE RATINGS: HYBRID SURFING

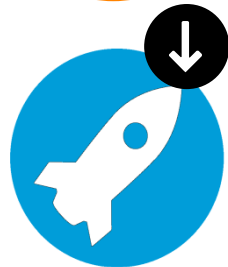# AT A GLANCE: THE ONLINE LANDSCAPE

January 2016

36 billion minutes spent.

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

18,273,000 people were actively surfing online.

Indicates growth or decline based on the previous month

Source: Nielsen Online Ratings – Hybrid, January 2016

TOP 10 BRANDS AND THEIR ENGAGEMENT

January 2016

Unique Audience Rank	Brands	Unique Audience (000s)	Active Reach (%)	Sessions Per Person	Time Per Person (hh:mm:ss)
1	Google	14,660	80.23	26.43	02:30:15
2	MSN/Outlook/Bing/Skype	11,139	60.96	19.67	02:17:20
3	Facebook	10,079	55.16	23.52	05:33:44
4	Microsoft	9,013	49.32	8.24	01:16:47
5	YouTube	8,678	47.49	9.21	03:06:24
6	eBay	7,147	39.11	10.10	01:46:52
7	Apple	5,737	31.40	7.33	00:59:03
8	Yahoo7	5,428	29.70	13.52	01:34:16
9	Wikipedia	5,369	29.38	5.46	00:28:06
10	PayPal	4,373	23.93	3.97	00:09:27

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, January 2016

TOP 10 BRANDS AND THEIR ENGAGEMENT

January 2016

Bubble Size = Time per Person

Active Reach (%) vs Sessions per Person

Legend:
- Google
- MSN/Outlook/Bing/Skype
- Facebook
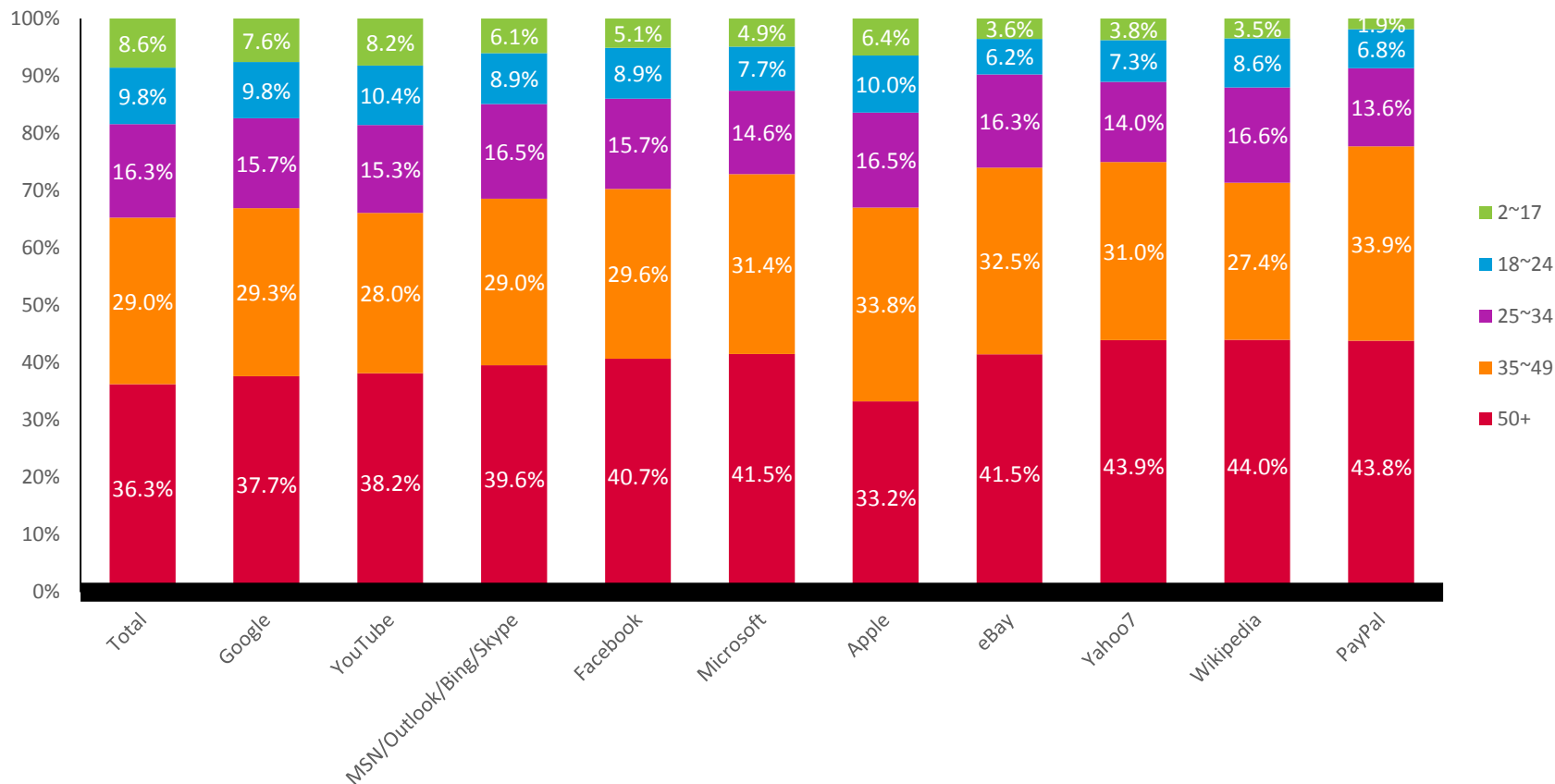- Microsoft
- YouTube
- eBay
- Apple
- Yahoo7
- Wikipedia
- PayPal
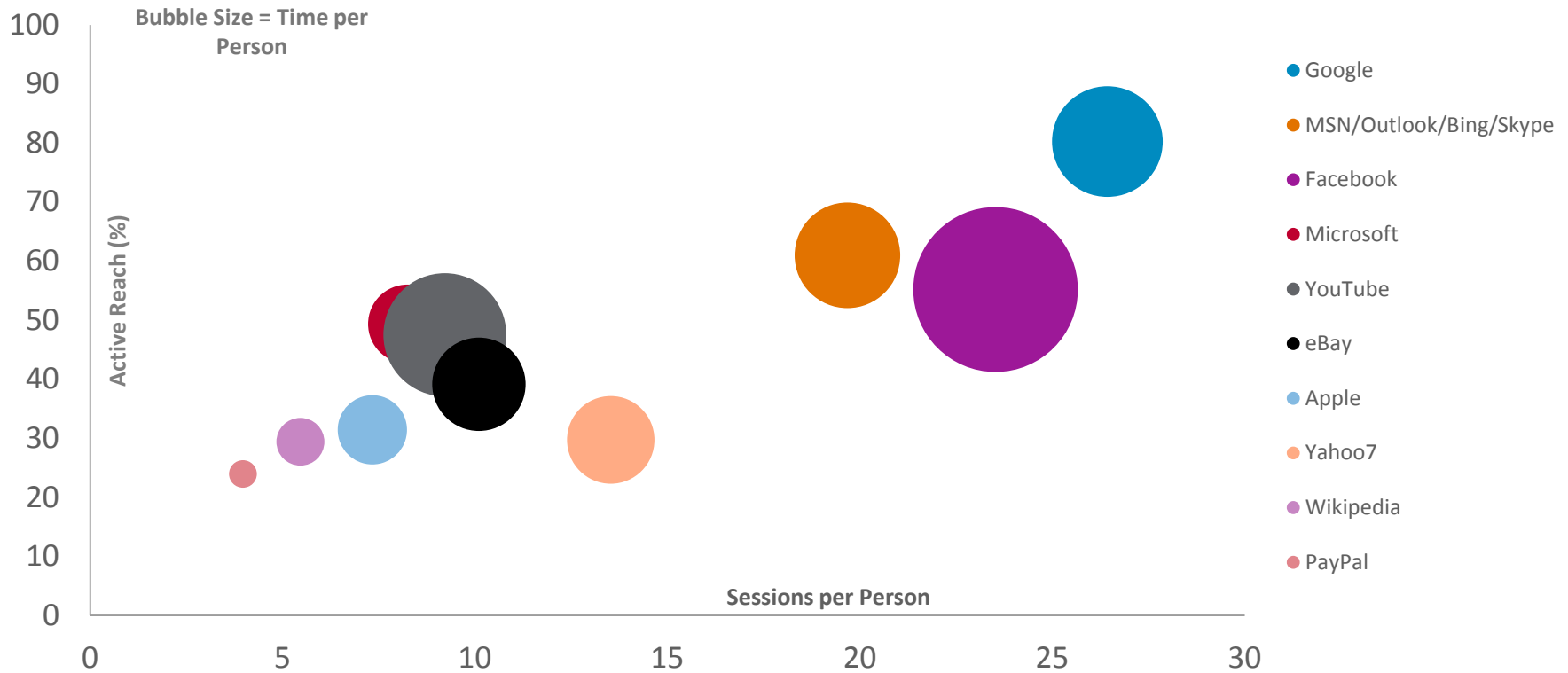
Six out of the top ten sites experienced an increase in active reach (%) month-on-month in January.
Currently ranking number one, Google experienced an increase of 6.7% in sessions per person and 12.3% in time per person. Meanwhile, Wikipedia saw the biggest growth in active reach (%) of 8.0% month-on-month in January and an increase of 9.7% in sessions per person.

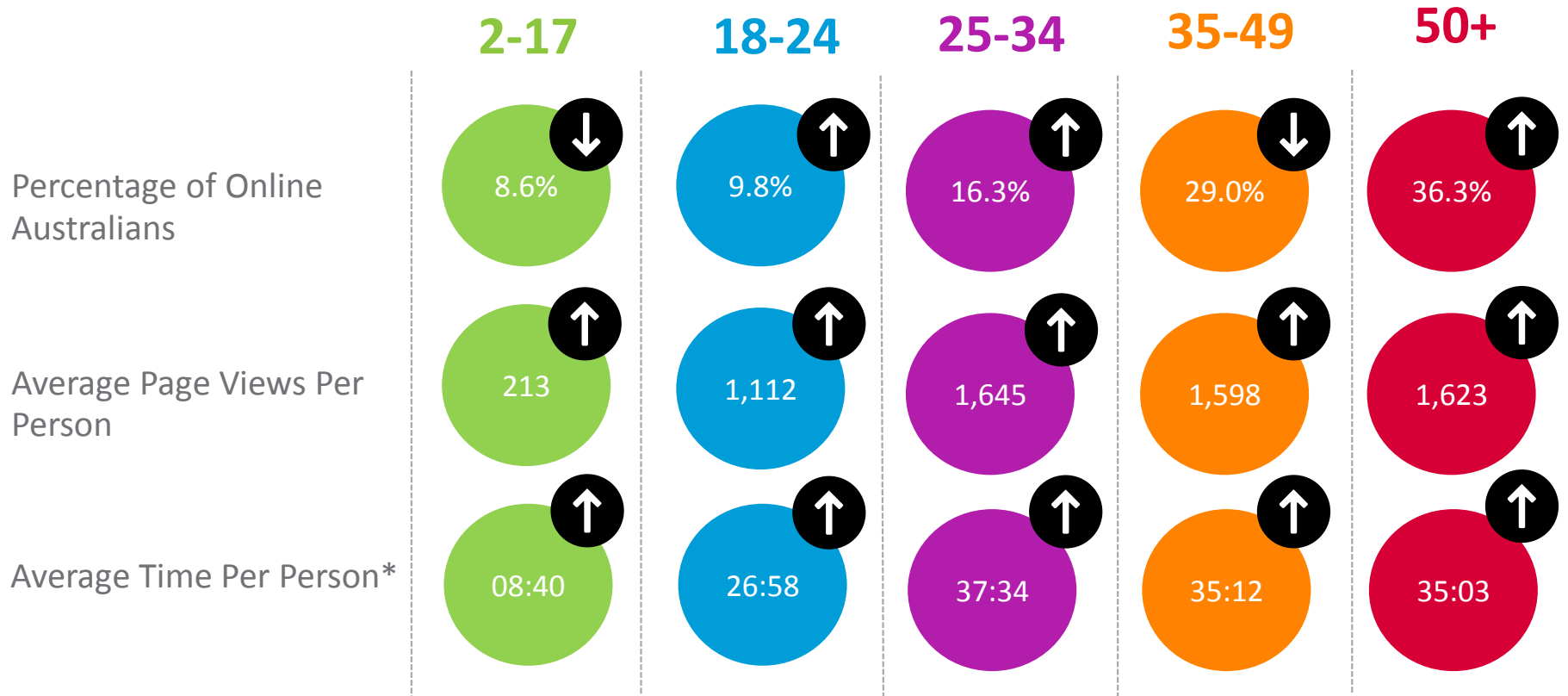Source: Nielsen Online Ratings – Hybrid, January 2016

TOP 10 BRANDS BY AGE

Unique Audience (Surfing): January 2016

	Total	Google	YouTube	MSN/Outlook/Bing/Skype	Facebook	Microsoft	Apple	eBay	Yahoo7	Wikipedia	PayPal
2~17	8.6%	7.6%	8.2%	6.1%	5.1%	4.9%	6.4%	3.6%	3.8%	3.5%	1.9%
18~24	9.8%	9.8%	10.4%	8.9%	8.9%	7.7%	10.0%	6.2%	7.3%	8.6%	6.8%
25~34	16.3%	15.7%	15.3%	16.5%	15.7%	14.6%	16.5%	16.3%	14.0%	16.6%	13.6%
35~49	29.0%	29.3%	28.0%	29.0%	29.6%	31.4%	33.8%	32.5%	31.0%	27.4%	33.9%
50+	36.3%	37.7%	38.2%	39.6%	40.7%	41.5%	33.2%	41.5%	43.9%	44.0%	43.8%

Wikipedia holds the highest skew towards those aged 50+ at 44.0% which is an 11.6% increase month-on-month in January 2016. More than 33% of PayPal and Apple's audience was aged between 35-49 – having the highest skew for this age group. YouTube continue to captivate young audiences with having the heaviest skew towards audiences aged below 25 years old.

HYBRID SURFING: DEMOGRAPHICS

The active online audience in Australia during January 2016 can be broken down as follows:

	2-17	18-24	25-34	35-49	50+
Percentage of Online Australians	8.6% ↓	9.8% ↑	16.3% ↑	29.0% ↓	36.3% ↑
Average Page Views Per Person	213 ↑	1,112 ↑	1,645 ↑	1,598 ↑	1,623 ↑
Average Time Per Person*	08:40 ↑	26:58 ↑	37:34 ↑	35:12 ↑	35:03 ↑

Three out of the five age groups experienced increases in audience this month. Time per person and the average page views per person for all Australians increased month-on-month in January 2016. The composition of unique audience shifted to Australians aged 50+.

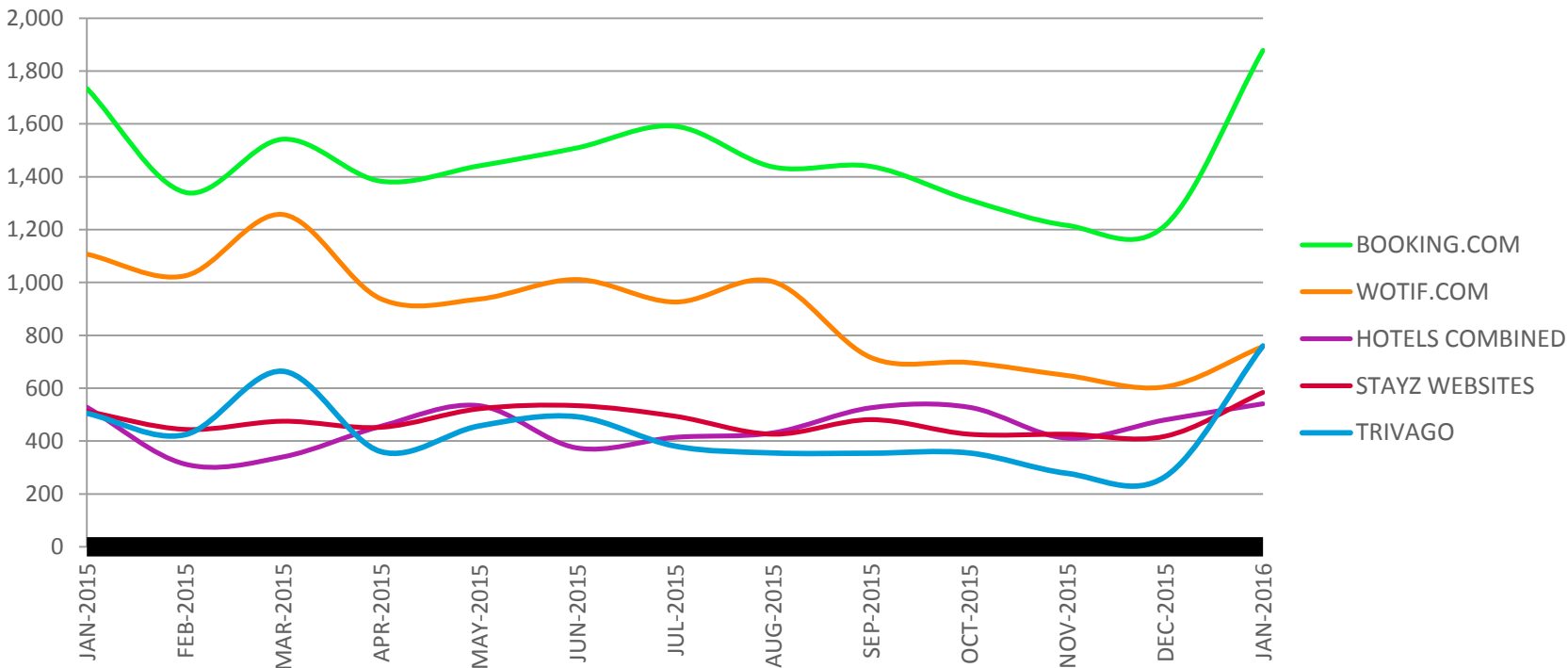↑ ↓ Indicates growth or decline based on the previous month

*HH:MM

Source: Nielsen Online Ratings – Hybrid, January 2016

CATEGORY SPOTLIGHT: HOTELS/HOTEL DIRECTORIES

TOP 5 HOTELS / HOTEL DIRECTORY SITES

Unique Audience (000s) : January 2015 – January 2016

All top five hotels/hotel directory websites recorded double digit gains in unique audiences during January 2016 compared to December 2015. The overall hotels/hotel directories sub-category saw an increase of 25% month-on-month with Trivago – currently ranked second in the sub-category – seeing the highest gains at +187% month-on-month.

Booking.com is currently leading the hotels/hotel directories sub-category with 1.9 million unique audiences, followed by Trivago and Wotif.com with 760,000 and 758,000 unique audiences respectively.

HIGHLIGHTS
NIELSEN ONLINE RATINGS: HYBRID STREAMING

HYBRID STREAMING KEY ONLINE STATISTICS

January 2016

4.3 billion streams watched.

7 billion minutes streamed.

9 hours and **49 minutes** spent streaming per person.

12,629,000 people were actively streaming online.

Indicates growth or decline based on the previous month

Source: Nielsen Online Ratings – Hybrid, January 2016

HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

January 2016

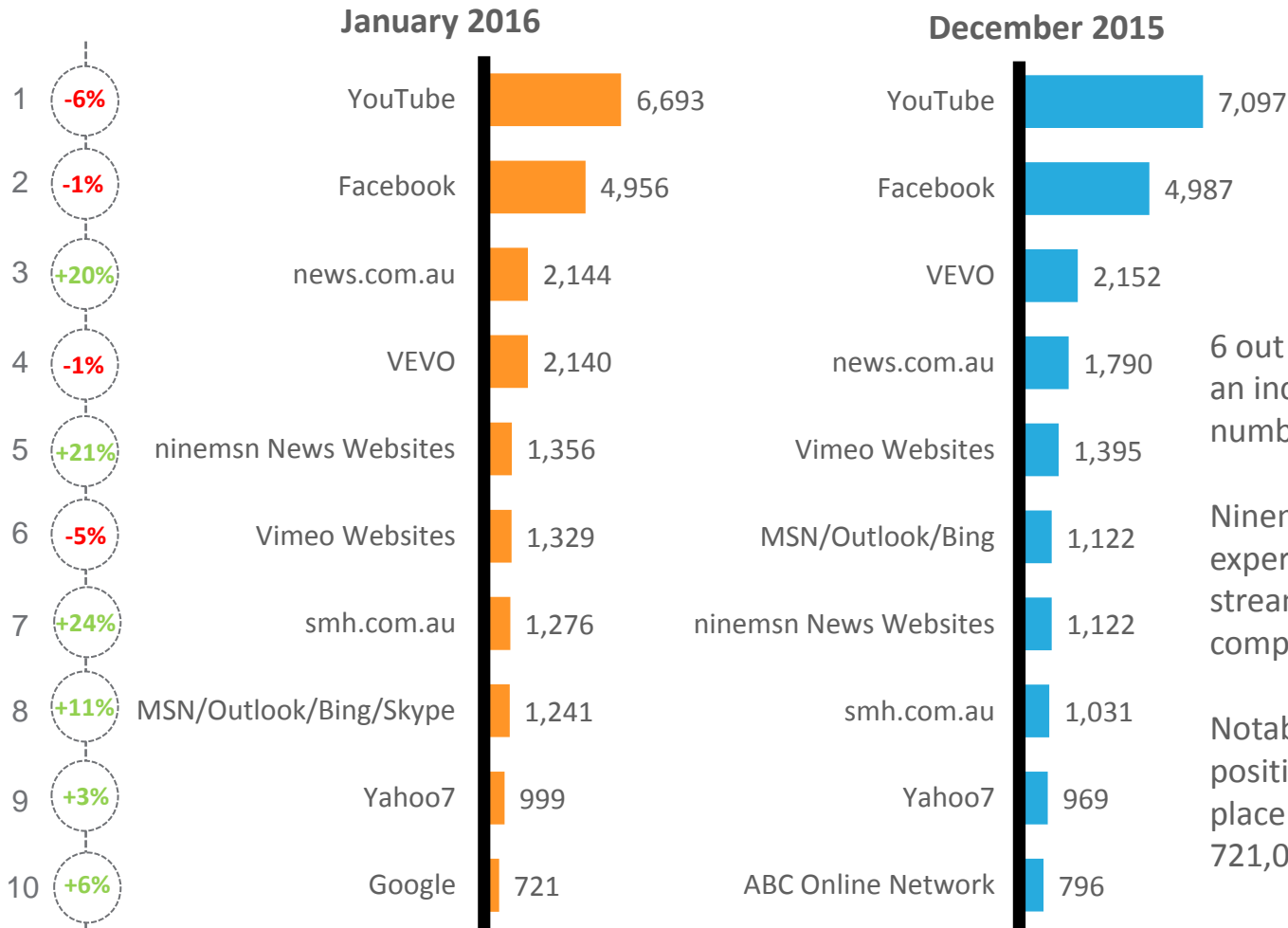| Unique Audience Rank	Brand	Unique Audience (000s)	Total Streams (000s)	Time Per Person (hh:mm:ss)
1	YouTube	6,693	2,195,056	10:38:58
2	Facebook	4,956	1,168,113	01:32:21
3	news.com.au	2,144	16,741	00:06:51
4	VEVO	2,140	163,184	01:42:52
5	ninemsn News Websites	1,356	18,262	00:12:14
6	Vimeo Websites	1,329	15,694	00:08:13
7	smh.com.au	1,276	5,705	00:05:03
8	MSN/Outlook/Bing/Skype	1,241	7,271	00:05:13
9	Yahoo7	999	12,986	00:20:56
10	Google	721	15,232	01:35:27

Note: In January 2016, 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 January 2016 data**.

Including web-based applications

13

TOP BRANDS COMPARISON – HYBRID STREAMING

January 2016, Unique Audience (000s)

|		January 2016		December 2015	
1	-6%	YouTube	6,693	YouTube	7,097
2	-1%	Facebook	4,956	Facebook	4,987
3	+20%	news.com.au	2,144	VEVO	2,152
4	-1%	VEVO	2,140	news.com.au	1,790
5	+21%	ninemsn News Websites	1,356	Vimeo Websites	1,395
6	-5%	Vimeo Websites	1,329	MSN/Outlook/Bing	1,122
7	+24%	smh.com.au	1,276	ninemsn News Websites	1,122
8	+11%	MSN/Outlook/Bing/Skype	1,241	smh.com.au	1,031
9	+3%	Yahoo7	999	Yahoo7	969
10	+6%	Google	721	ABC Online Network	796

6 out of the top 10 sites reported an increase in unique audience numbers in January 2016.

Ninemsn News Websites experienced an increase of 21% in streaming Australians in comparison to last month.

Notably, Google Video has positioned themselves in 10th place with a unique audience of 721,000.

Source: Nielsen Online Ratings – Hybrid, January 2016

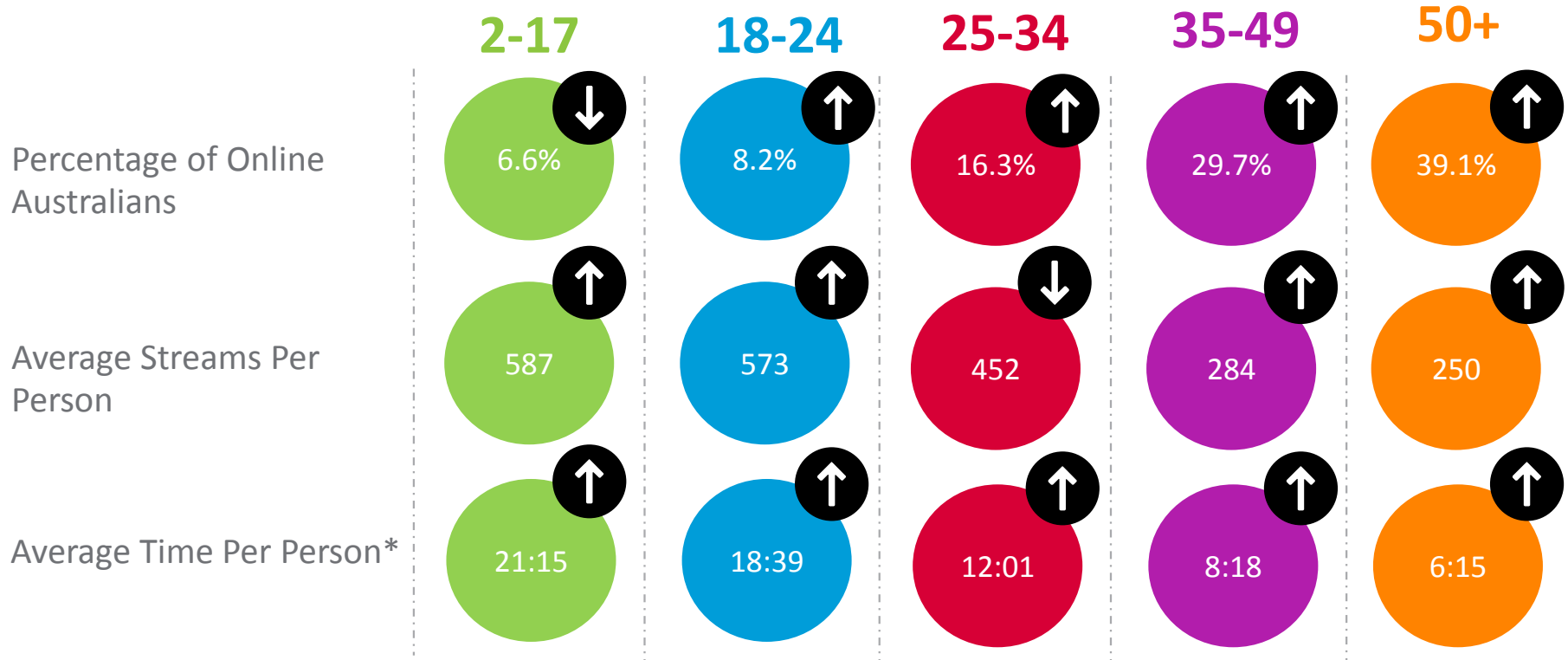# TOP 10 STREAMING BRANDS BY AGE

Unique Audience (Streaming): January 2016
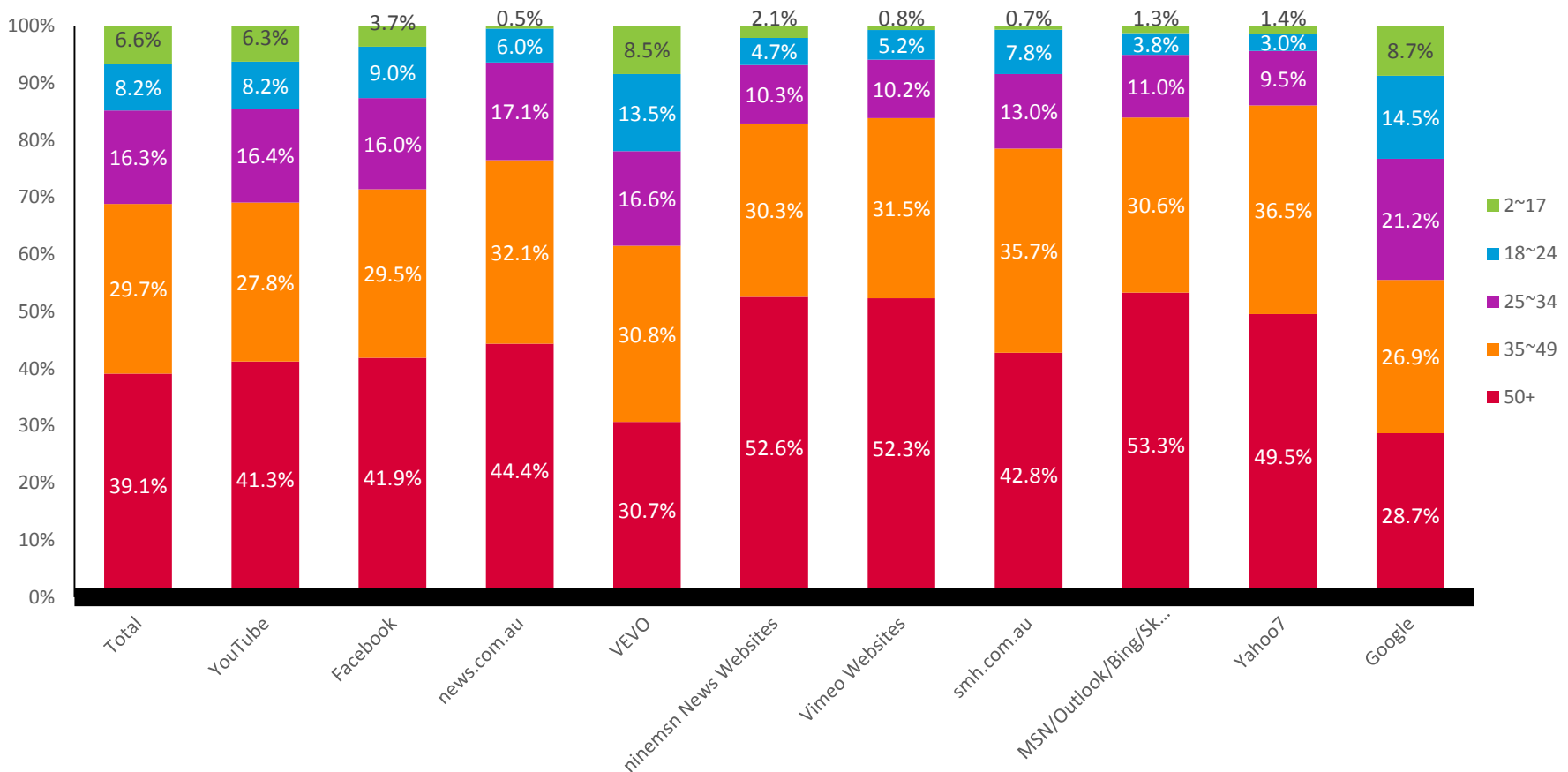
MSN/Outlook/Bing/Skype has held the highest proportion of streaming Australians aged over 50, with over half of their audience falling into that age group. Google Video unique audiences had the highest proportion of under 25 year old Australians in the top 10

HYBRID STREAMING: DEMOGRAPHICS
January 2016

	2-17	18-24	25-34	35-49	50+
Percentage of Online Australians	6.6% ↓	8.2% ↑	16.3% ↑	29.7% ↑	39.1% ↑
Average Streams Per Person	587 ↑	573 ↑	452 ↓	284 ↑	250 ↑
Average Time Per Person*	21:15 ↑	18:39 ↑	12:01 ↑	8:18 ↑	6:15 ↑

All age groups experienced increases in time per person this month.
Streams per person also increased for all age groups except for Australians aged between 25 to 34.
The 2-17 age group saw the highest gains in average time per person month-on-month increasing by almost 5 hours.

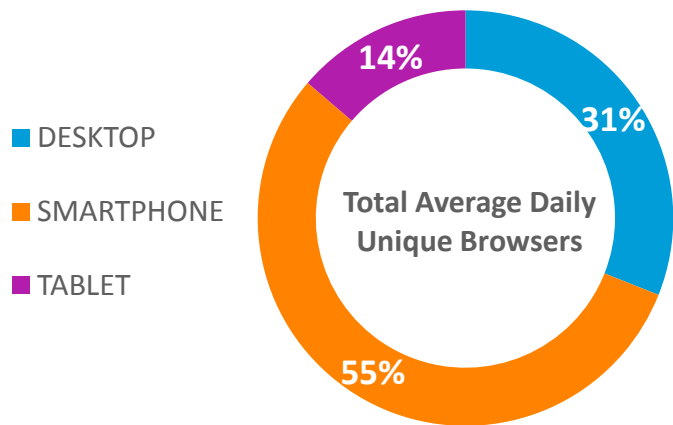↑ ↓ Indicates growth or decline based on the previous month

*HH:MM

DEVICE HIGHLIGHTS

NIELSEN ONLINE RATINGS: MARKET INTELLIGENCE

SITES ARE BROWSED MORE ON PORTABLE DEVICES

January 2016 – Market Domain – Domestic Traffic

DESKTOP
SMARTPHONE
TABLET

Total Average Daily Unique Browsers

14%
31%
55%

69% of total average daily unique browsers came from portable devices.

16% increase since January 2015 in total average daily unique browsers from portable devices
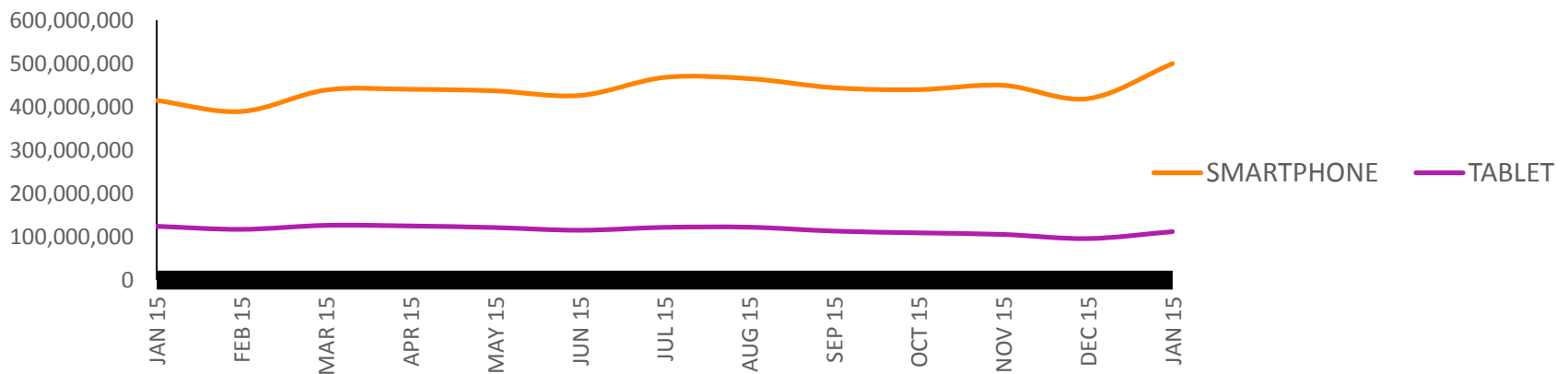

SMARTPHONE   TABLET

12,000,000
10,000,000
8,000,000
6,000,000
4,000,000
2,000,000
0

JAN 15 | FEB 15 | MAR 15 | APR 15 | MAY 15 | JUN 15 | JUL 15 | AUG 15 | SEP 15 | OCT 15 | NOV 15 | DEC 15 | JAN-16

Source: Nielsen Online Ratings - Market Intelligence January 2016
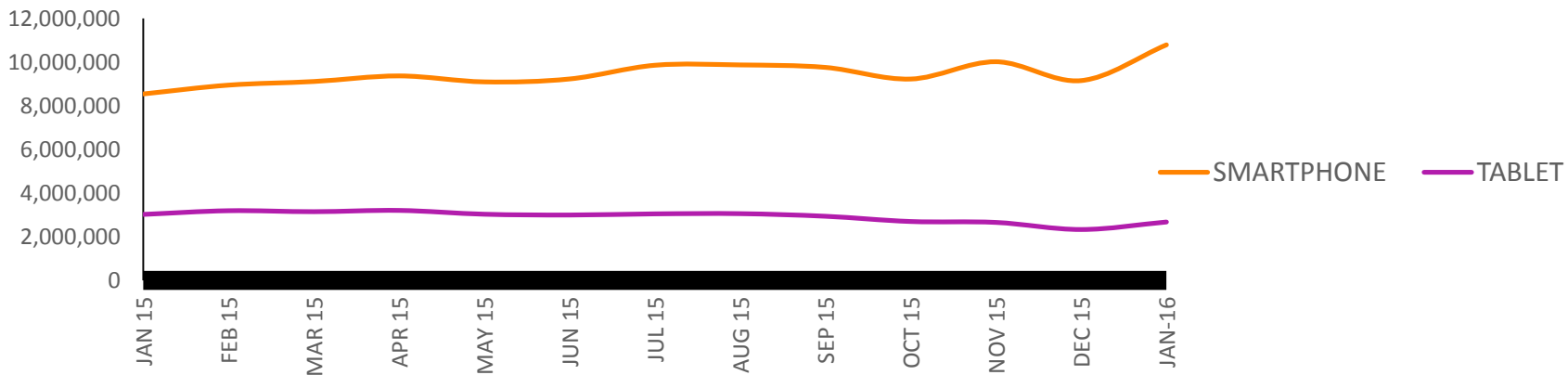
SESSIONS ON PORTABLE DEVICES HAS GROWN 13% IN A YEAR

January 2016 – Market Domain – Domestic Traffic

- DESKTOP
- SMARTPHONE
- TABLET

Total Sessions

12%
36%
52%
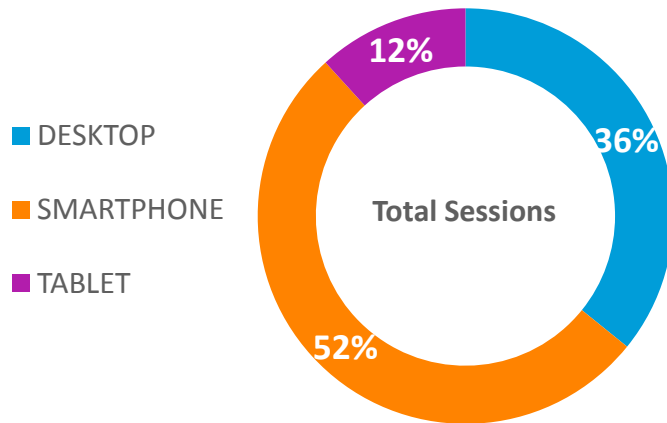
64% of total online sessions came from portable devices

13% increase since January 2015 in total online sessions from portable devices

SMARTPHONE — TABLET

600,000,000
500,000,000
400,000,000
300,000,000
200,000,000
100,000,000
0

JAN 15 · FEB 15 · MAR 15 · APR 15 · MAY 15 · JUN 15 · JUL 15 · AUG 15 · SEP 15 · OCT 15 · NOV 15 · DEC 15 · JAN 15

Source: Nielsen Online Ratings - Market Intelligence January 2016

LATEST NIELSEN INSIGHTS...

NIELSEN TWITTER TV RATINGS

Nielsen Twitter TV Ratings - January, 2016
Monthly Top Five - Sport

Rank	Network	Program	Date	Unique Audience	Impressions	Tweets
1	SEVEN	2016 Australian Open Day 2	19/01/16	209.6K	2.8M	20.1K
2	SEVEN	2016 Australian Open Day 4	21/01/16	204.6K	2.6M	23.5K
3	SEVEN	2016 Australian Open Day 1	18/01/16	195.5K	2.0M	15.4K
4	SEVEN	2016 Australian Open Day 3	20/01/16	185.7K	1.5M	14.4K
5	SEVEN	2016 Australian Open Day 5	22/01/16	183.7K	2.1M	21.6K

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. Sport includes live/new episodes only. For simulcast events, the metrics reflect the highest Unique Audience across all airing networks, denoted with an asterisk.

SUPER BOWL SOCIAL TV FACTS

The golden anniversary Super Bowl game, in which the Peyton Manning-led Broncos defeated the Panthers 24 to 10, generated more than 64 thousand Tweets which were viewed over 3.3 million times by a unique audience of 239 thousand. Making it the most social sports event so far this year. The most-Tweeted minute during the TV event was during the Pepsi Halftime Show at 12:43 PM Australian Eastern Standard Time.

TOP RETWEET BY @TAYLORSWIFT13
"COLDPLAY, MARK RONSON, BRUNO MARS, BEYONCÉ, DANCE BATTLE, FIX YOU MONTAGE, JOYOUS FINALE, OH MY GOD IT WAS SO GOOD I FEEL LIKE I DREAMED IT"

		UNIQUE AUTHORS	TWEETS	IMPRESSIONS	UNIQUE AUDIENCE
DEN vs CAR 8/02/2016	7MATE, ESPN	21.1K	64.1K	3.3M	239.4K

READ FULL STORY HERE

DIGITAL AUDIENCE MEASUREMENT UPDATE

COMING SOON! IAB Australia and Nielsen will shortly be delivering stage two of the digital audience measurement roadmap – Digital Ratings (Monthly). This will for the first time provide the Australian market with visibility of total, unduplicated audiences across digital devices for both web browsers and apps.

Late in 2016, stage three, the launch of Digital Content Ratings (DCR) will mark the industry-first view of <u>daily</u> audiences across digital devices (computer, smartphone and tablet).

DCR utilises the Nielsen Software Development Kit (SDK), Nielsen panels and large 3rd party data to provide <u>vastly increased scale</u> of measurement that allows for <u>more granular reporting</u> of digital audiences.
In order to reap the full benefits that DCR will bring, we encourage you to speak to your Nielsen Account Manager today regarding SDK implementation for daily measurement.

More details here: http://digitalmeasurement.nielsen.com/
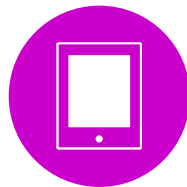
NIELSEN DIGITAL ONLINE RATINGS – DECEMBER 2015 OVERSTATEMENT OF DIGITAL SURFING VOLUMETRICS FOR SOME FAIRFAX MEDIA SITES

Please note the following recent changes to the grouping of Fairfax Media sites within Nielsen Digital Content Measurement (Digital Surfing) AU.

Due to a tagging anomaly, volumetrics (*page views/duration*) for SMH, The Age, Brisbane Times, WA Today and Canberra Times were overstated in December 2015 data.
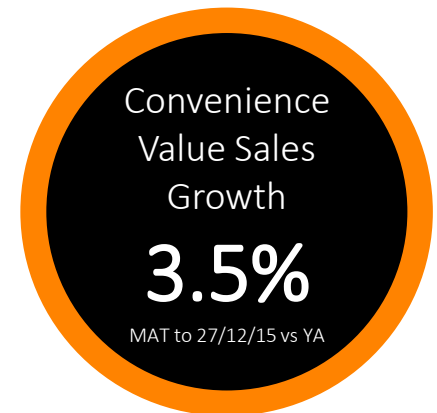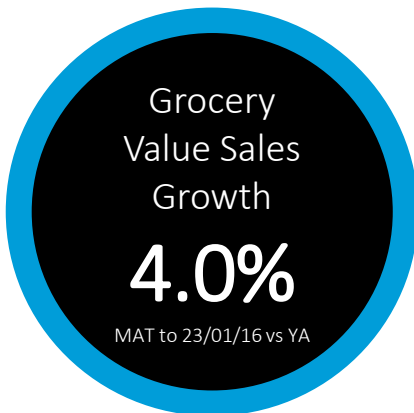
Ranking of News publishers based on the volumetrics (session, time, page views) per person, would be also be impacted. Based on analysis from Measurement Science #1 rankings for these metrics would be assigned to news.com.au for December 2015.

A change has been implemented and volumetrics will be reported correctly with January 2016 data forward.

Please contact your Nielsen representative with any questions regarding this message.

DID YOU KNOW? GROCERY, PHARMACY & CONVENIENCE RECORDED SOLID GROWTH

In the 12 months leading up to January 2016, the dollar value of three key verticals within retail have seen increases year-on-year. The Australian pharmacy market has seen double digital gains year-on-year followed by the grocery and convenience markets, both showing positive uplifts in day-to-day retail consumption.

Grocery
Value Sales
Growth

4.0%

MAT to 23/01/16 vs YA

Pharmacy
Value Sales
Growth

11.5%

MAT to 23/01/16 vs YA

Convenience
Value Sales
Growth

3.5%

MAT to 27/12/15 vs YA

MAT – Moving Annual Total (Rolling 52 Weeks)

YA – Year Ago (Previous 52 Weeks)

Source: Nielsen Homescan™

nielsen

AN UNCOMMON SENSE
OF THE CONSUMER™

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