



nielsen

# THE AUSTRALIAN ONLINE LANDSCAPE REVIEW

MARCH 2015

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# STATE OF THE ONLINE LANDSCAPE

March 2015

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

The online landscape in March saw Australians spend 37 hours online over 64 sessions; with 41 billion minutes spent online and 30 billion pages viewed.

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

- Home and lifestyle with a specific focus on **real estate**.

General updates for this month include:

- **Nielsen Twitter TV Ratings**
  - Top retweet for Game of Thrones this week - @hamishblake: SPOILER: instead of "Winter is coming" this seasons **#GoT** catch phrase is the far more positive "Hasn't this just been a LOVELY Autumn?".
- **Nielsen Neuro**
  - The \$5000 cartoon that allows businesses to evaluate if their advertisement is effective before it enters its costly production phase.

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](mailto:careau@nielsen.com).



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, yellow, green, blue, purple). Several colored dots (yellow, pink, red) are placed on the surface of the sphere, with thin lines extending from them towards the right. The background is black.

# HIGHLIGHTS

## NIELSEN ONLINE RATINGS: HYBRID

# AT A GLANCE: THE ONLINE LANDSCAPE

March 2015



**30 billion** viewed pages.



**41 billion** minutes spent.



**37 hours** spent online, across **64 sessions** per person.



**18,203,000 people** were actively surfing online.



Indicates growth or decline based on the previous month

# TOP 10 BRANDS AND THEIR ENGAGEMENT

March 2015

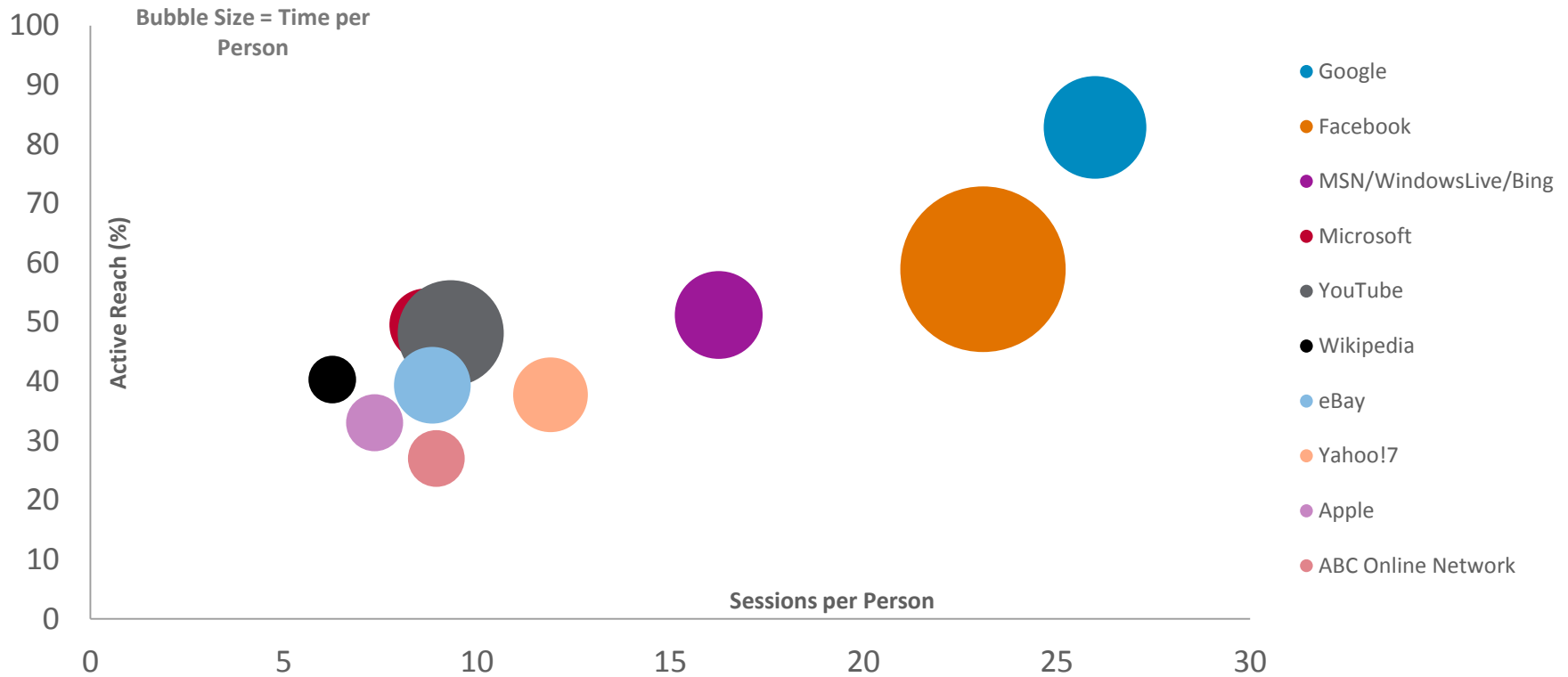
Unique Audience Rank	Brands	Unique Audience (000s)	Page Views (000s)	Active Reach (%)	Sessions Per Person	Time Per Person (hh:mm:ss)
1	Google	15,083	3,503,811	82.86	25.99	02:57:35
2	Facebook	10,730	2,095,812	58.95	23.09	07:40:06
3	MSN/WindowsLive/Bing	9,325	999,584	51.23	16.25	02:09:20
4	Microsoft	9,027	58,324	49.59	8.68	01:28:43
5	YouTube	8,769	567,356	48.17	9.32	03:09:12
6	Wikipedia	7,349	219,236	40.37	6.26	00:38:07
7	eBay	7,168	773,445	39.38	8.84	01:38:46
8	Yahoo!7	6,879	387,424	37.79	11.90	01:33:13
9	Apple	6,025	23,313	33.10	7.35	00:54:37
10	ABC Online Network	4,927	140,580	27.07	8.95	00:53:57

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, March 2015

# TOP 10 BRANDS AND THEIR ENGAGEMENT

March 2015



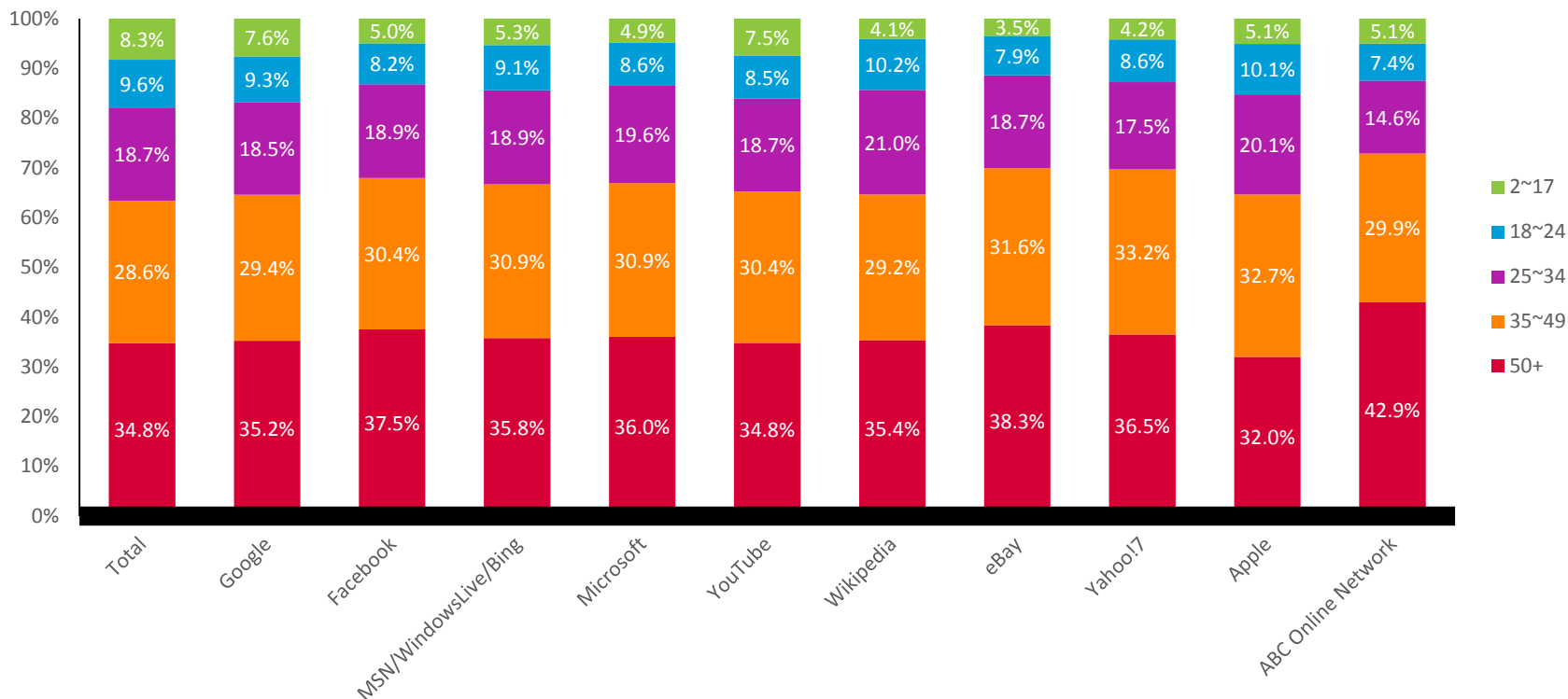
All of the top 10 sites experienced growth in engagement this month in comparison to February.

There were notable increases in time per person with Wikipedia and Microsoft experiencing increases of 24.2% and 23.6% respectively.

Interestingly, Australians spent 13.2% more sessions browsing the Apple website followed by YouTube and Wikipedia at 8.7% and 8.1% respectively.

# TOP 10 SURFING BRANDS BY AGE

Unique Audience (Surfing): March 2015

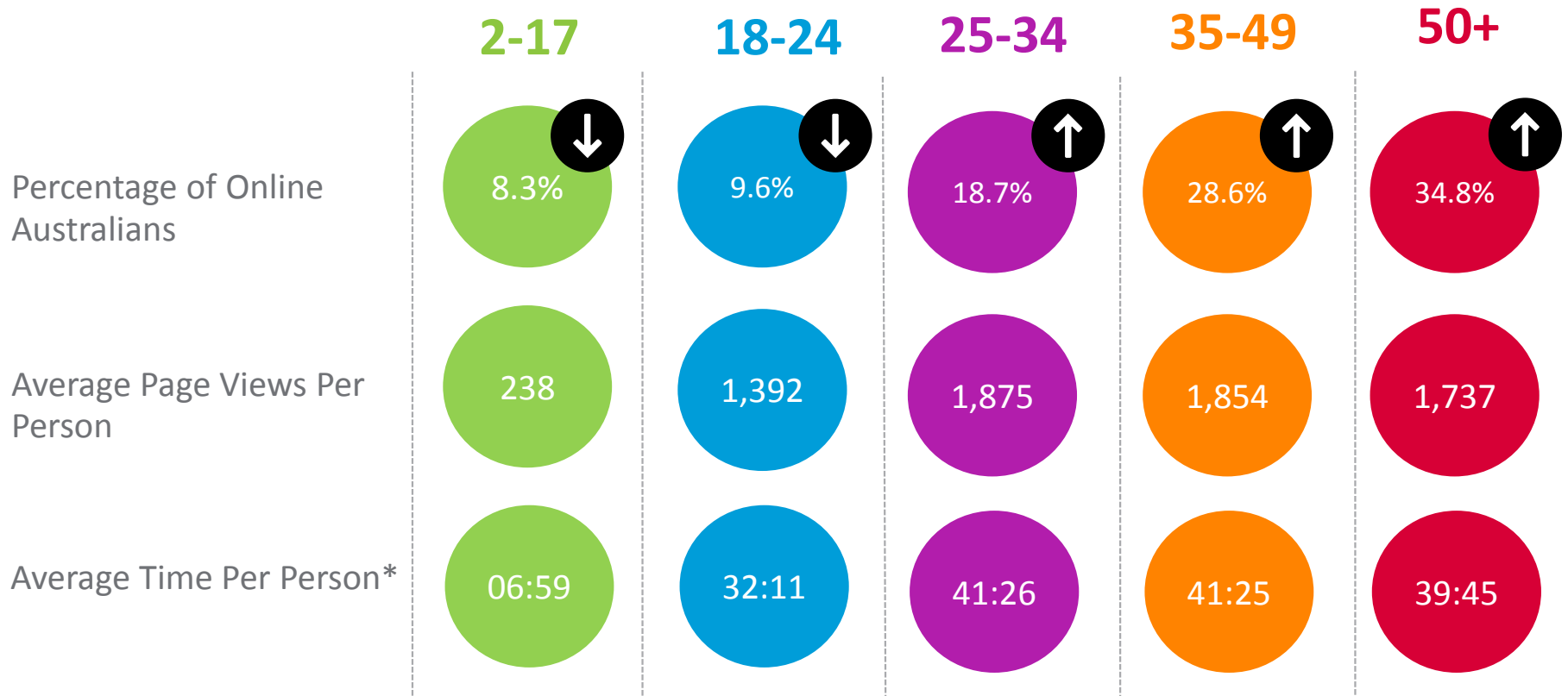


Further examination of the top ten sites by their age demographic splits reveals that ABC Online Network had the heaviest skew towards Australians aged 50+ at 42.9%. Meanwhile, Yahoo!7 had the highest proportion of 35-49 year olds at 33.2%.

Looking at the younger age groups, Wikipedia had the heaviest skew towards Australians aged 25-34 at 21%, whilst Apple had the highest proportion of their audience skewed towards those aged 18-24 at 10.1%.

# HYBRID SURFING: AGE DEMOGRAPHICS ONLINE

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



3 out of the 5 age groups experienced growth in the percentage of online Australians this month, with those aged 25-34 experiencing the largest boost of 5.3% to 24% this month. Due to the shift from the shorter February month to the normalized March day count, average page views per person and average time per person underwent increases.

↑ ↓ Indicates growth or decline based on the previous month

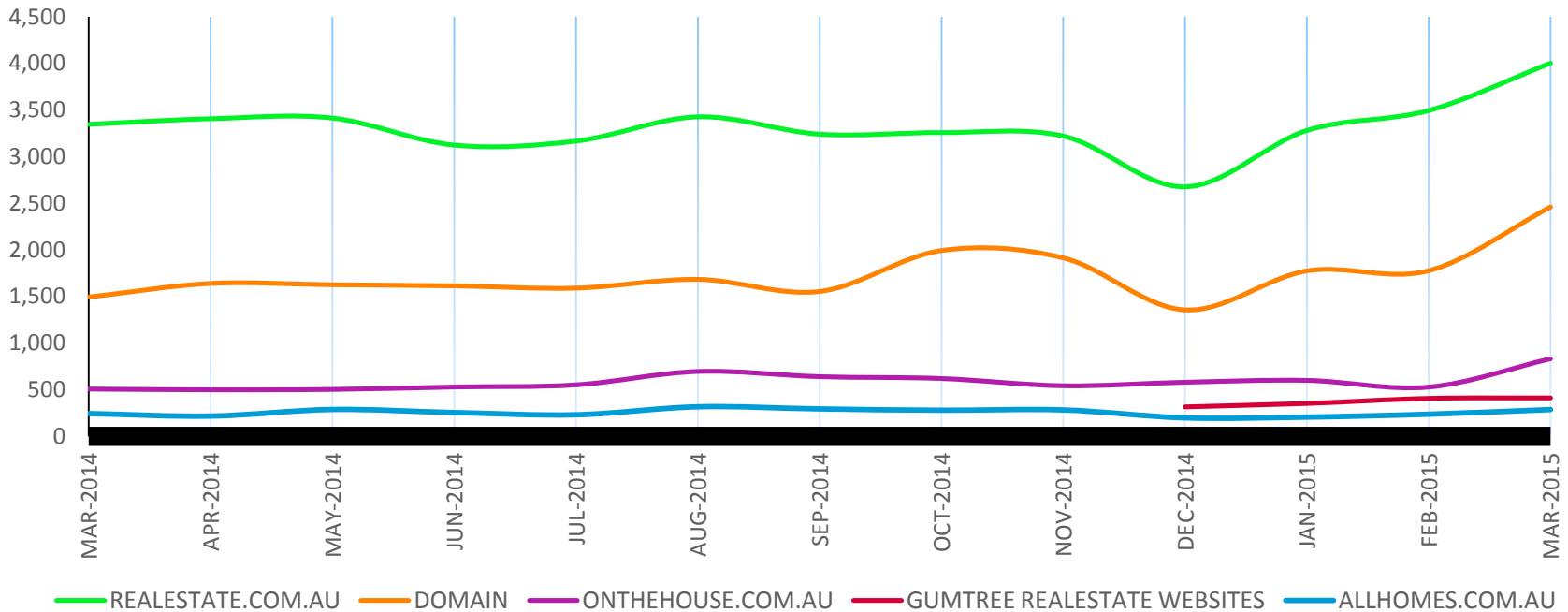
\*HH:MM

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, pink, red) are placed on the surface of the sphere, with thin lines extending from them towards the right, suggesting a focus or spotlight effect.

# CATEGORY SPOTLIGHT: REAL ESTATE

# TOP 5 REAL ESTATE SITES

Unique Audience: March 2014 – March 2015



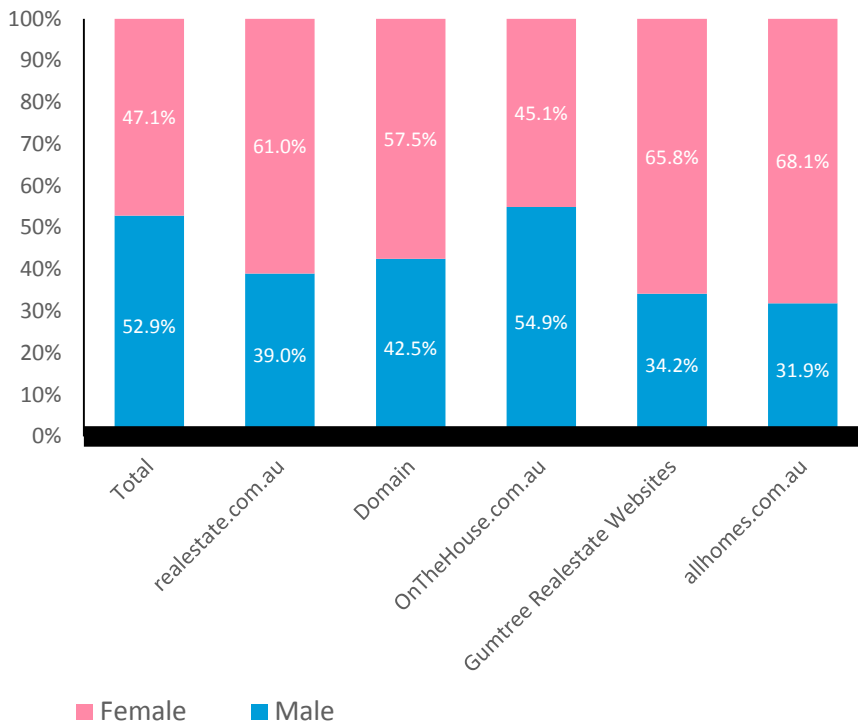
Real estate sites have experienced a category growth record in March 2015. With category growth of 25% and over a million additional people viewing these sites since March 2014, the spike points to a mounting interest in the real estate sector for Australians.

Both realestate.com.au and Domain set all-time unique audience highs this month.

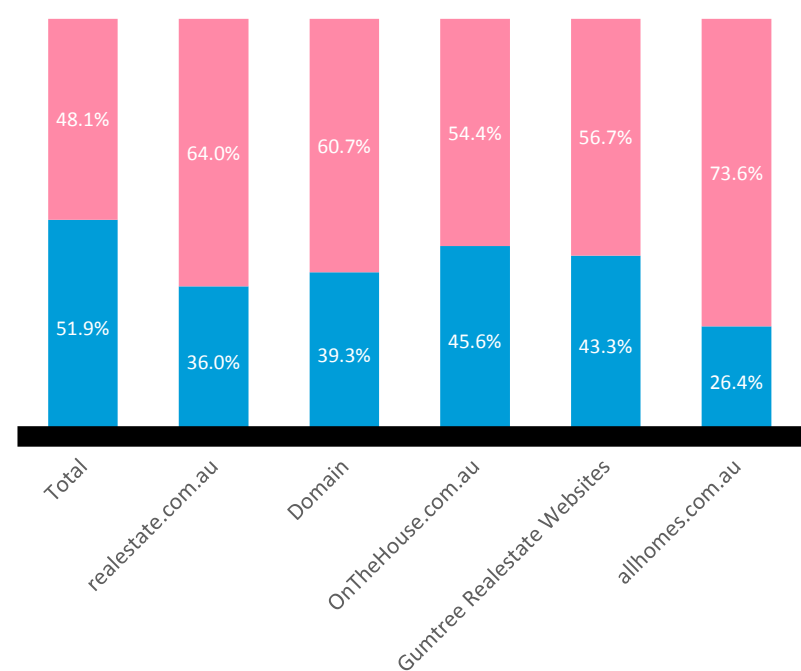
realestate.com.au reached a unique audience of over 4 million people for the first time ever on the back of a 15 percent increase from February. Total unique audience for the period was 4,003,000, with an increase of 656,000 when compared with March 2014. Likewise, Domain experienced an all-time high of 2,460,000 in March, a 38 percent increase in audience since February and an additional 966,000 people when compared to March 2014. OnTheHouse.com.au also saw a large audience increase of 58 percent from 528,000 to 832,000.

# TOP 5 REAL ESTATE/APARTMENTS SITES BY GENDER

Sessions Per Person: March 2015



Time Per Person: March 2015



Breaking down the real estate category by gender reveals that while allhomes.com.au has a heavy skew towards females in terms of sessions per person at 68.1%, OnTheHouse.com.au reported a heavy skew towards males, who account for 54.9% of their total sessions per person.

The trend illustrated by sessions per person is further reflected when examining time per person. However, the data indicates that while females browsing Gumtree Real estate Websites log more sessions, males possibly spend more time per session. While Australian males did not log as many sessions on Gumtree Real estate websites as females, their time spent per person reveals a more even split at 56.7% for females and 43.3% for males.

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 yellow, green, cyan, blue, purple, and red. 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 center or other parts of the sphere.

# HIGHLIGHTS

## NIELSEN ONLINE RATINGS: HYBRID STREAMING

# HYBRID STREAMING KEY ONLINE STATISTICS

March 2015



**3.3 billion** streams watched.



**5.9 billion** minutes streamed.



**7 hours and 14 minutes** spent streaming per person.



**13,567,000** people were actively streaming online.



Indicates growth or decline based on the previous month

# HYBRID STREAMING: TOP 10 BRANDS BY AUDIENCE

March 2015

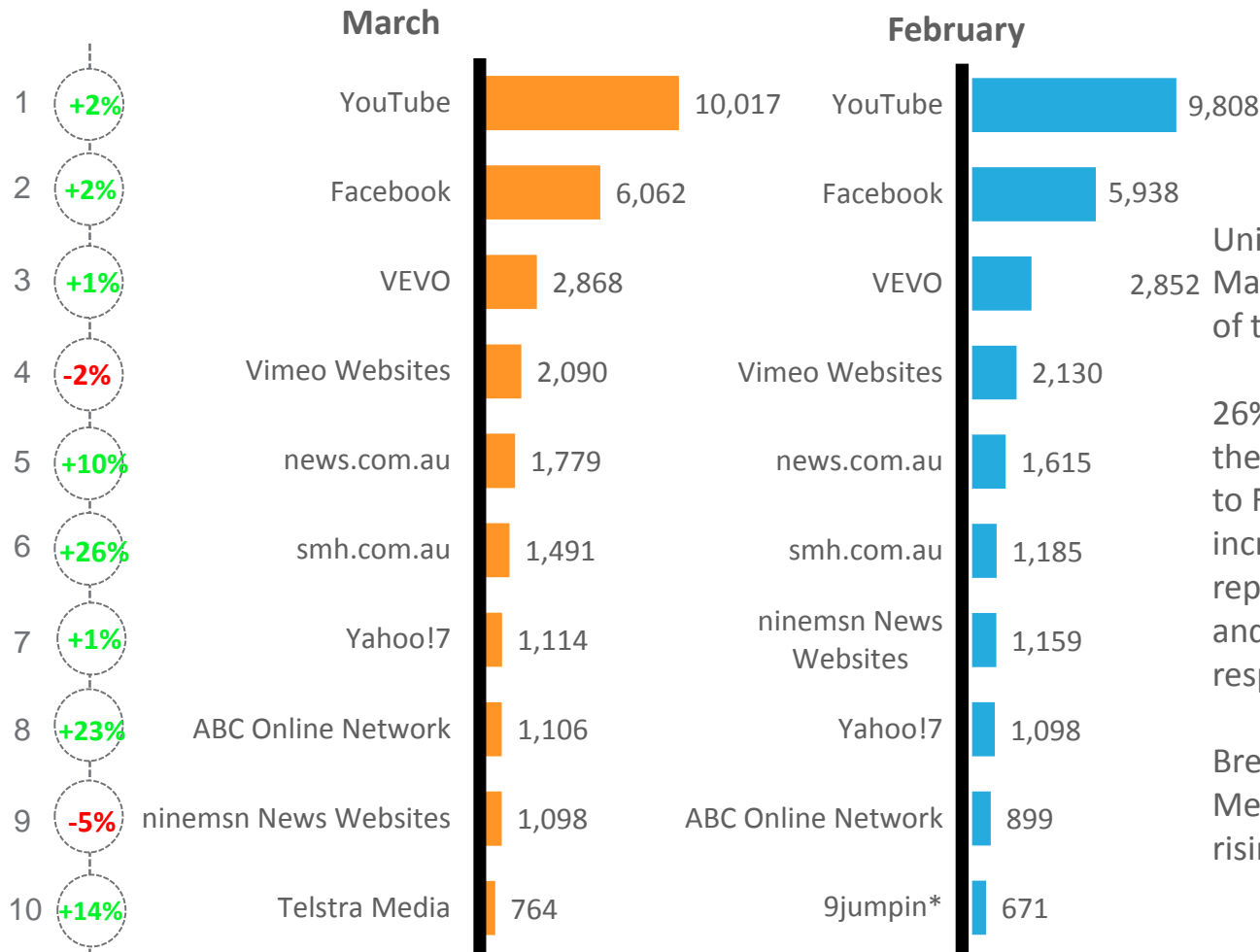
Unique Audience Rank	Brand	Unique Audience (000s)	Total Streams	Time Per Person (hh:mm:ss)
1	YouTube	10,017	1,654,590	04:52:09
2	Facebook	6,062	173,217	01:23:52
3	VEVO	2,868	118,277	00:41:34
4	Vimeo Websites	2,090	6,954	00:14:14
5	news.com.au	1,779	15,391	00:09:42
6	smh.com.au	1,491	4,389	00:06:46
7	Yahoo!7	1,114	13,262	01:03:20
8	ABC Online Network	1,106	8,287	02:20:12
9	ninemsn News Websites	1,098	12,424	00:09:19
10	Telstra Media	764	5,641	00:39:52

Including web-based applications

Source: Nielsen Online Ratings – Hybrid, March 2015

# TOP BRANDS COMPARISON – HYBRID STREAMING

March 2015, Unique Audience (000)



Unique audience for the month of March reported increases for 8 out of the top 10 brands.

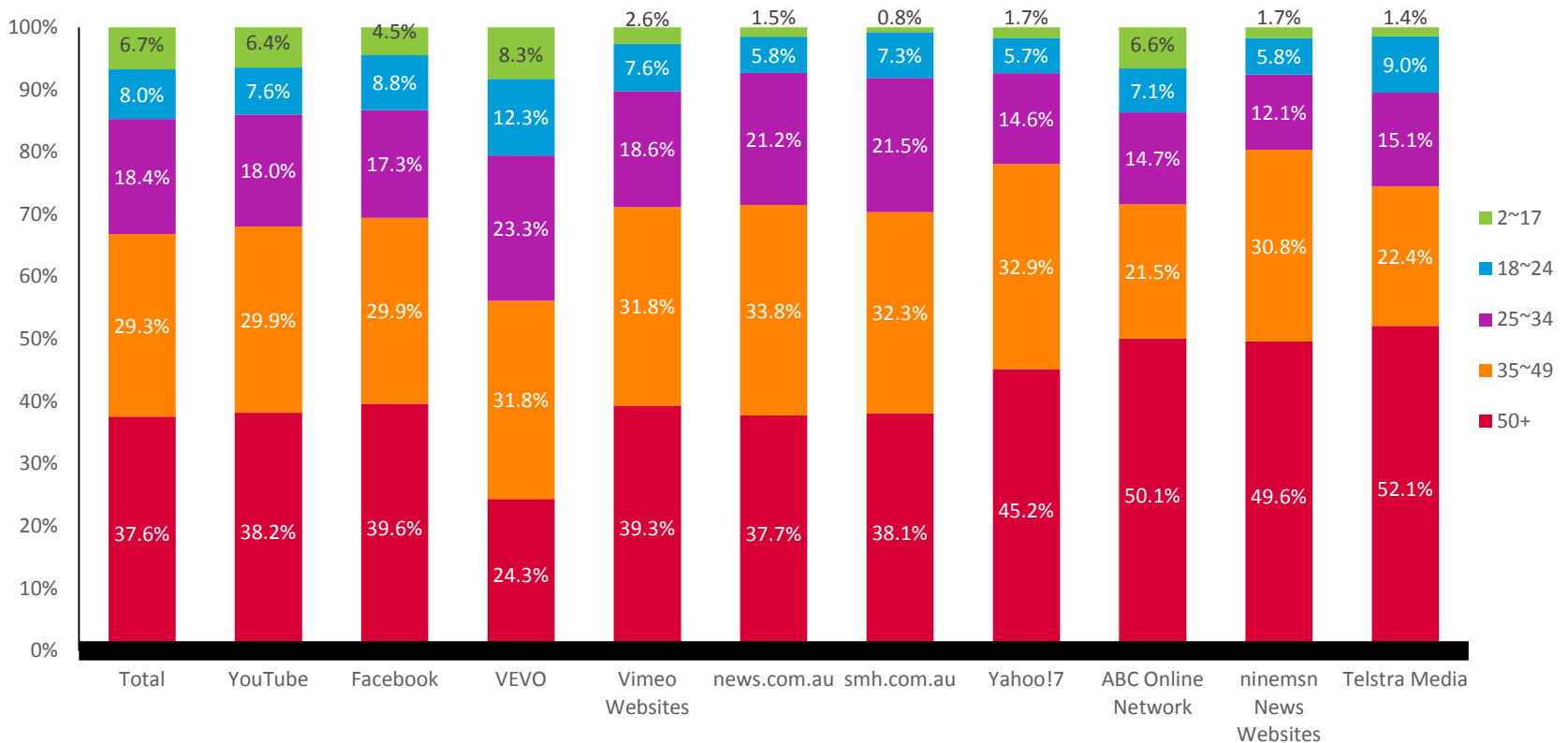
26% more Australians streamed on the smh.com.au site in comparison to February. Other significant increases for news sites were reported for ABC Online Network and news.com.au at 23% and 14% respectively.

Breaking into the top 10 is Telstra Media, with an increase of 14%, rising 3 spots from last month.

\*9Jumpln has been masked this month due to tagging technicalities

# TOP 10 STREAMING BRANDS BY AGE

Unique Audience (Streaming): March 2015

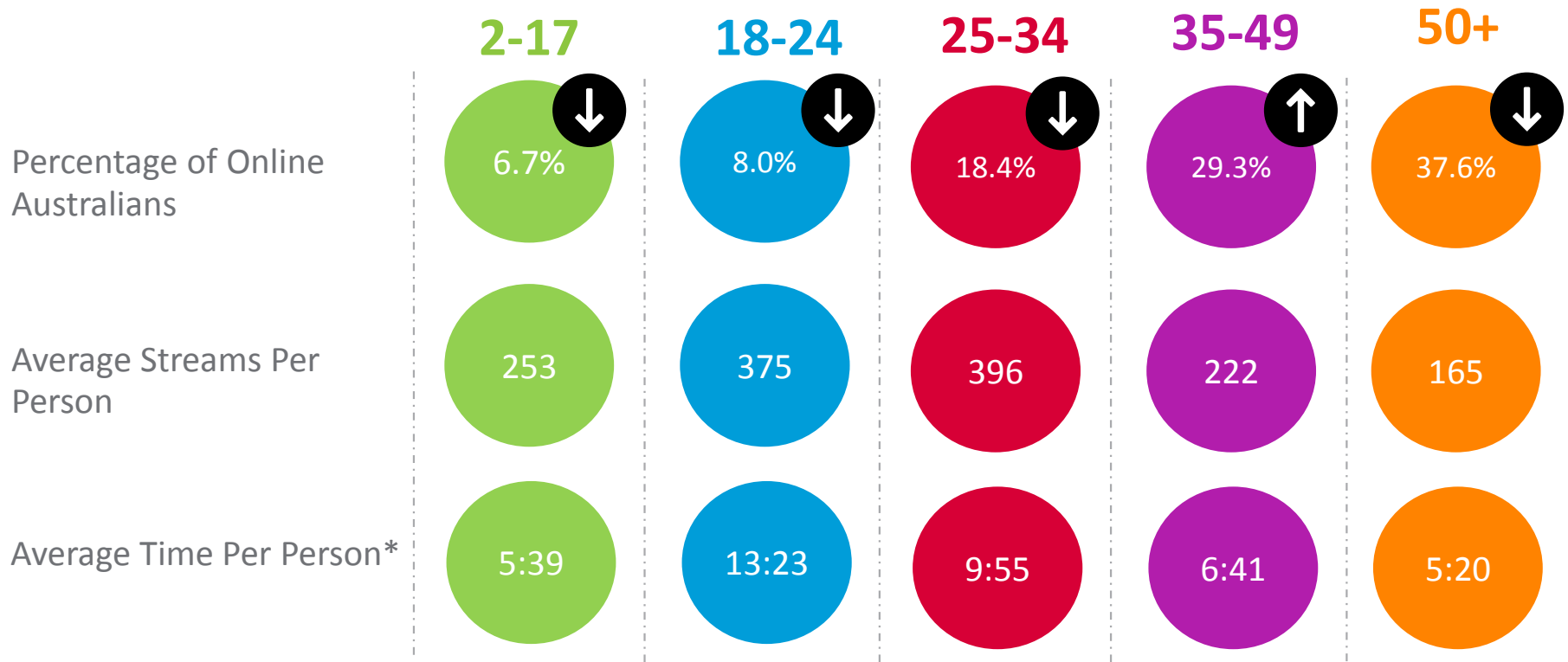


Delving deeper into the top 10 brands for streaming reveals that VEVO has the highest proportion of Australians falling within the 2-34 age groups.

Conversely, Telstra Media reported that over half of their streaming audience was aged 50+ for March at 52.1%, followed closely by ABC Online Network at 50.1% and ninemsn News Websites at 49.6%.

# HYBRID STREAMING: AGE DEMOGRAPHICS ONLINE

March 2015



Despite a fall across 4 of the 5 age groups this month in terms of unique audience composition, average streams per person and average time per person experienced growth. Notable increases were observed for those aged 18-24 with a 37% increase and those aged 25-34 with a 27% increase in average time per person. Meanwhile, those aged 35-49 and 50+ experienced growth in average streams per person at 17% and 14% respectively.

↑ ↓ Indicates growth or decline based on the previous month

\*HH:MM

# GENDER BREAKDOWN – HYBRID STREAMING



6,736,000

Number of Streaming Australians

6,831,000

1,410,613

Total Streams Viewed (000s)

1,939,382

209

Streams per person

284

07:18:43

Time Per Person (HH:MM:SS)

07:10:54

Both genders reported increases in all variables this month. Australian males increased the most in terms of number of streams with a 16% boost, compared to the 8% increase reported for females. On the other hand, Australian females experienced significant growth in time per person at an 18% increase, compared to males at 11%.

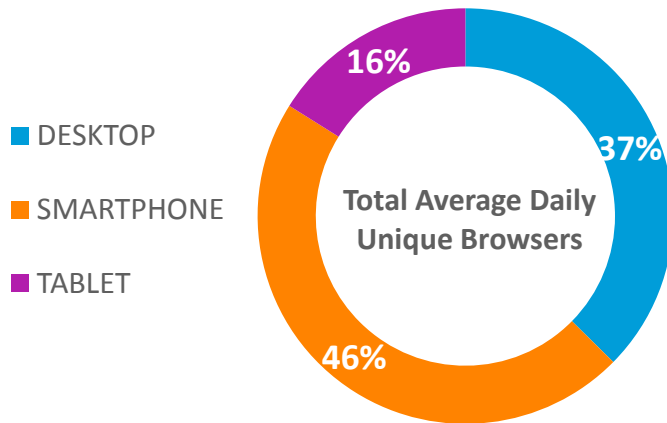
An abstract graphic on the left side of the slide. It features a sphere-like shape composed of many thin, curved lines in various colors (red, yellow, green, blue, purple). Several colored dots (yellow, pink, red) are placed on the surface of the sphere, with thin lines extending from them towards the right. The background is black.

# DEVICE HIGHLIGHTS

NIELSEN ONLINE RATINGS: MARKET  
INTELLIGENCE

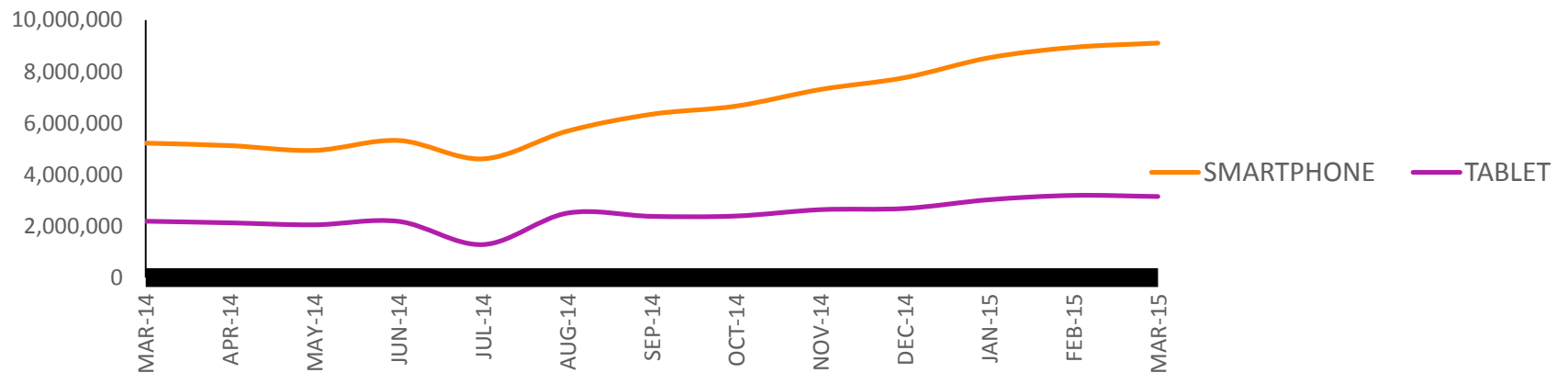
# DEVICE TYPE COMPARISON (EXCLUDING APPLICATIONS)

March 2015 – Market Domain – Domestic Traffic



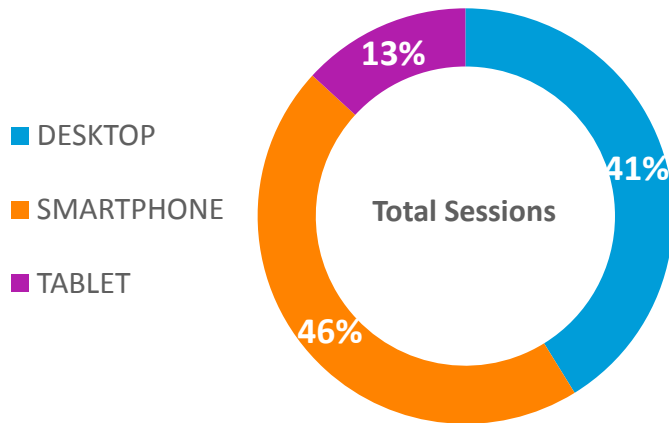
**62%** of total average daily unique browsers came from portable devices.

**↑ 65%** increase since March 2014 in total average daily unique browsers from portable devices



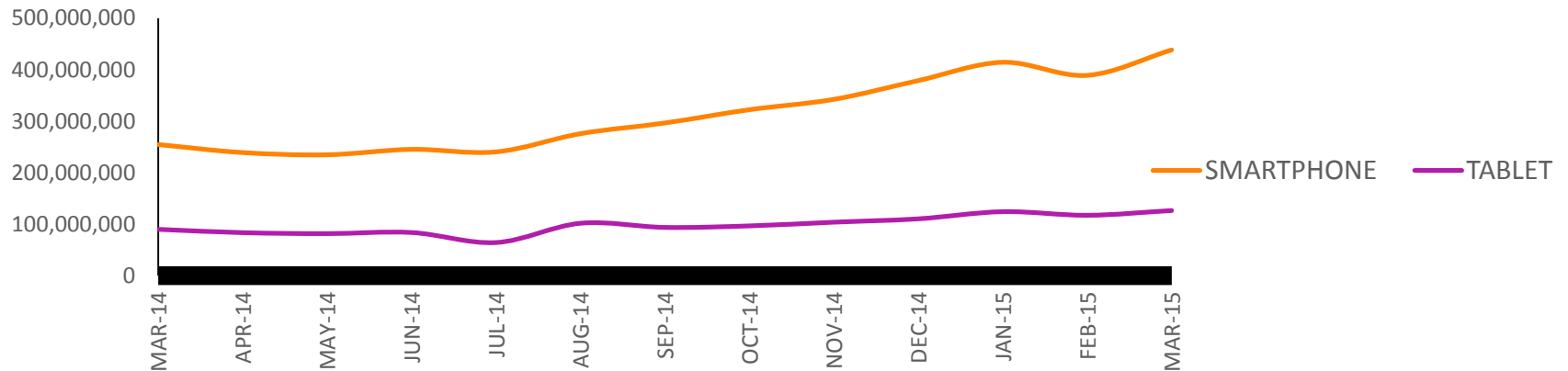
# DEVICE TYPE COMPARISON (EXCLUDING APPLICATIONS)

March 2015 – Market Domain – Domestic Traffic



**59%** of total online sessions came from portable devices

**↑ 64%** increase since March 2014 in total online sessions from portable devices



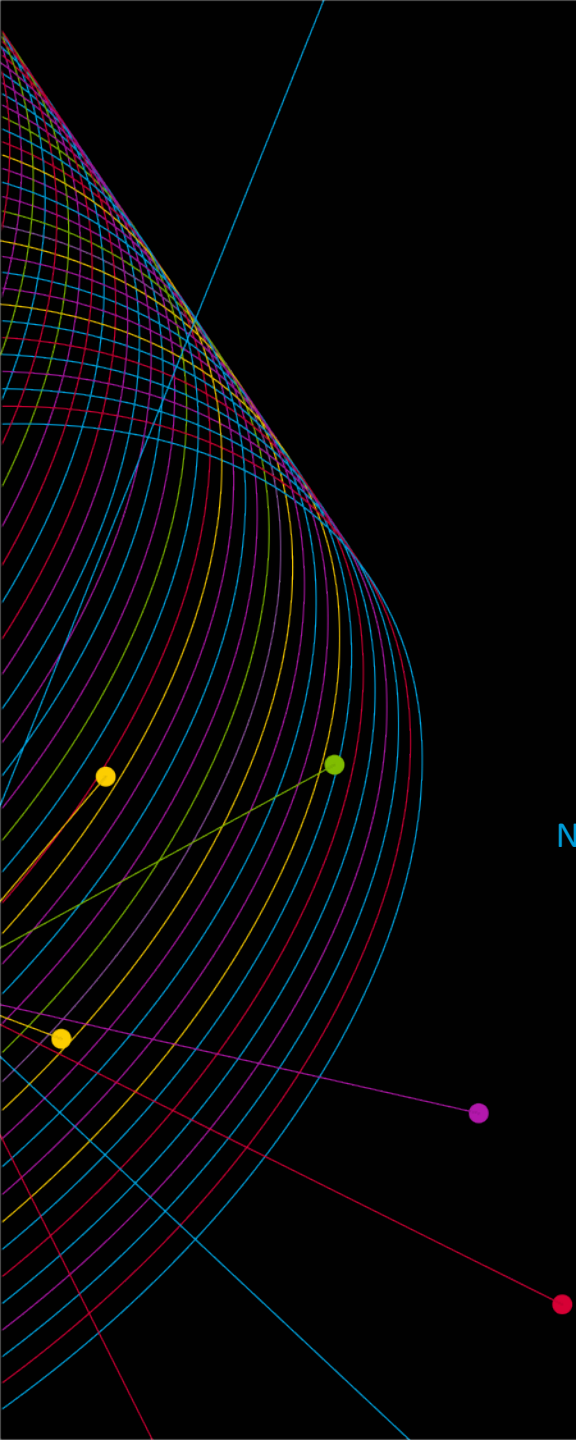
An abstract graphic on the left side of the slide. It features a series of thin, curved lines in various colors (blue, green, yellow, red) that form a partial view of a sphere or a dome. Several colored dots (yellow, green, purple, red) are placed on these lines, with thin lines extending from them towards the right, suggesting data points or connections.

# GENERAL UPDATES FOR THIS MONTH:

# HIGHLIGHTS

## NIELSEN TV TWITTER RATINGS

NIELSEN TWITTER TV RATINGS MEASURES THE REACH OF TV-RELATED CONVERSATION ON TWITTER USING OUR EXCLUSIVE ACCESS TO TWITTER'S FIREHOSE.



# GAME OF THRONES CONQUERS SOCIAL TV

Season 5 premiere *'The Wars to Come'* aired 13<sup>th</sup> April 2015



With **over half a million impressions**, the Season 5 premiere of #GoT was one of the **most social non-sport programs** since the launch of NTTR in October 2014



Tweets related to the program were seen by a **unique audience of 161,500**



**Most popular character trends** for the premiere were Jon Snow, Tyrion, Lannister, Daenerys and Cersei



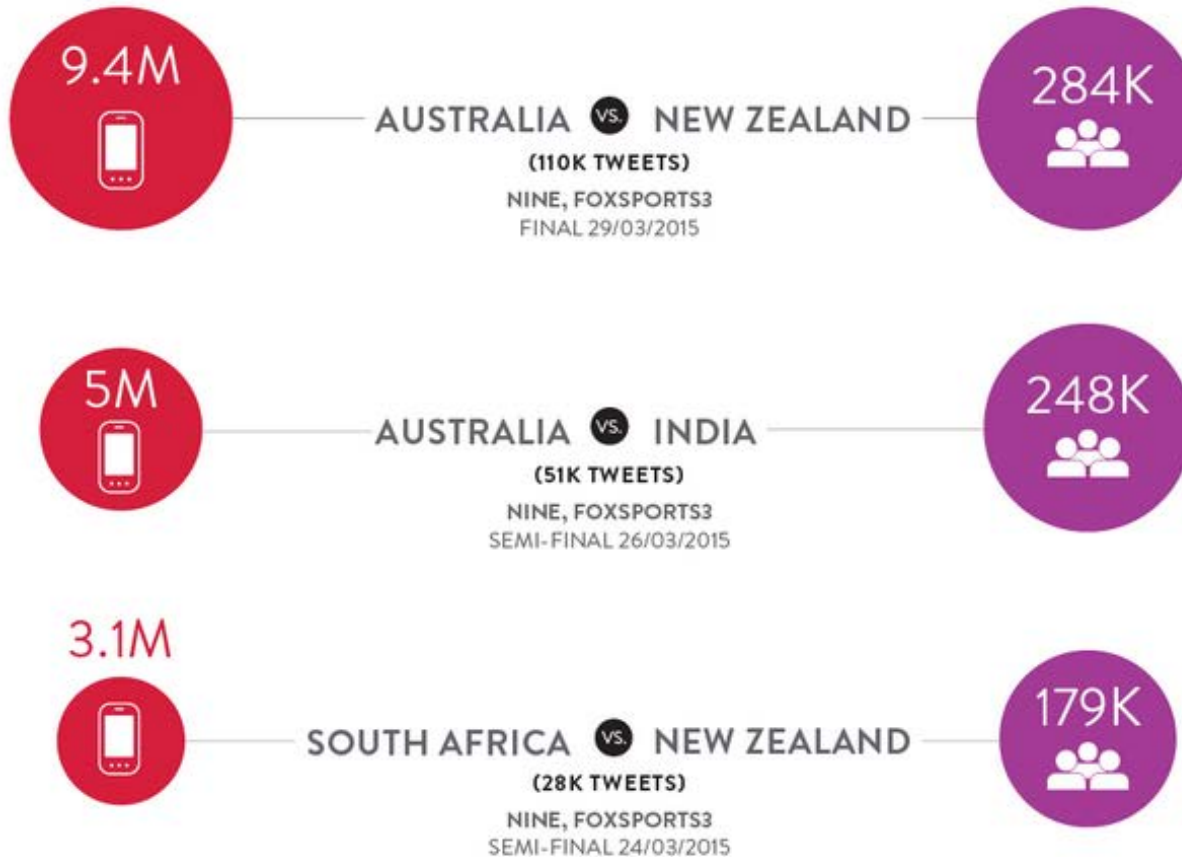
**39%** of tweets were sent using an **iPhone**

# ICC CRICKET WORLD CUP HIGHLIGHTS

## The biggest moments of the 2015 Cricket World Cup

IMPRESSIONS

AUDIENCE



Legend: 110K tweets were seen 9.4 million times (impressions) by a unique audience of 284K.

# ICC CRICKET WORLD CUP HIGHLIGHTS

## # TOP HASHTAG

	HASHTAG	TWEETS
1	#cwc15	197,000
2	#ausvind	75,500
3	#ausvnz	58,300

## 🕒 TOP TWEETS PER MINUTE

1,400

TWEETS AT  
9:07PM 29/03/2015



## 👥 TOP TEAM

	TEAM	MENTIONS
1	AUSTRALIA @CricketAus	47,100
2	NEW ZEALAND @BLACKCAPS	16,200
3	ENGLAND @ECB_cricket	5,600

## 🏃 TOP PLAYER

	PLAYER ACCOUNT	MENTIONS
1	MICHAEL CLARKE @MClarke23	10,400
2	STEVE SMITH @stevesmith49	6,600
3	DAVID WARNER @davidwarner31	4,600

# ICC CRICKET WORLD CUP HIGHLIGHTS

## World Cup Pool Matches 2015



### TOP POOL MATCHES BY AUDIENCE (14/02/2015 – 15/03/2015)

DATE	CHANNEL	MATCH	AUDIENCE	IMPRESSIONS	TWEETS
14/02/2015	NINE, FOXSPORTS3	ENGLAND vs. AUSTRALIA	229K	4.5M	37K
28/02/2015	NINE, FOXSPORTS3	AUSTRALIA vs. NEW ZEALAND	200K	3.4M	37K
14/02/2015	FOXSPORTS1	SRI LANKA vs. NEW ZEALAND	193K	2.2M	14K
8/03/2015	NINE, FOXSPORTS3	SRI LANKA vs. AUSTRALIA	168K	2.4M	20K

Source: Nielsen Twitter TV Ratings: 14/02/15 – 29/03/15. Nielsen Twitter TV Ratings captures relevant Australian Tweets from three hours before, during, and three hours after an event's initial broadcast. Unique Audience of relevant Tweets ascribed to an episode is measured from when Tweets are sent until the end of the broadcast day at 5am. Metrics include activity and reach across 100+ Free to Air and Subscription TV Channels.

An abstract graphic on the left side of the slide, resembling a brain or a neural network. It consists of a dense grid of thin, curved lines in various colors (blue, green, yellow, red, purple) that form a curved, bowl-like shape. Several lines extend from the grid to small colored dots (yellow, purple, red) scattered to the right of the main structure.

# NIELSEN NEURO: IN THE NEWS

# NIELSEN NEURO: IN THE NEWS:

## MAKING BETTER ADVERTISING

### The Sydney Morning Herald

*“... the animation, the \$5000 cartoon, worked particularly well because clients could see if their advertisement was effective before it entered its costly production phase”*

*“... being able to measure the level of engagement, moment by moment, during an advertisement enabled advertisers to make subtle changes to increase a commercial's effectiveness”*

### Full article

<http://www.smh.com.au/business/media-and-marketing/nielsen-neuro-pacifics-5000-cartoon-saves-advertisers-millions-20150402-1mcwzr.html>



*... it tells marketers when we are engaged with an ad, and when we switch off.*

### Full news item

<https://au.news.yahoo.com/nsw/video/watch/27057490/marketers-reading-minds/>



nielsen  
.....

AN UNCOMMON SENSE  
OF THE CONSUMER™

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