



Fairfax Digital's
Domestic
& International
Travellers
Audience Insights

July 2014

Domestic
Travel Intenders

NIelsen
CONNECTED
CONSUMER

Fairfax Media

Media Consumption

OF FAIRFAX DIGITAL'S DOMESTIC TRAVELLERS



41% (2.9 million~)

of Fairfax Media's Digital audience intend to travel domestically within the next 6 months



43%

GENDER



57%

18-34 | 36%

35-54 | 37%

55+ | 26%

AGE



31%
HHI \$110K+



28%
CHD <18YRS IN HH

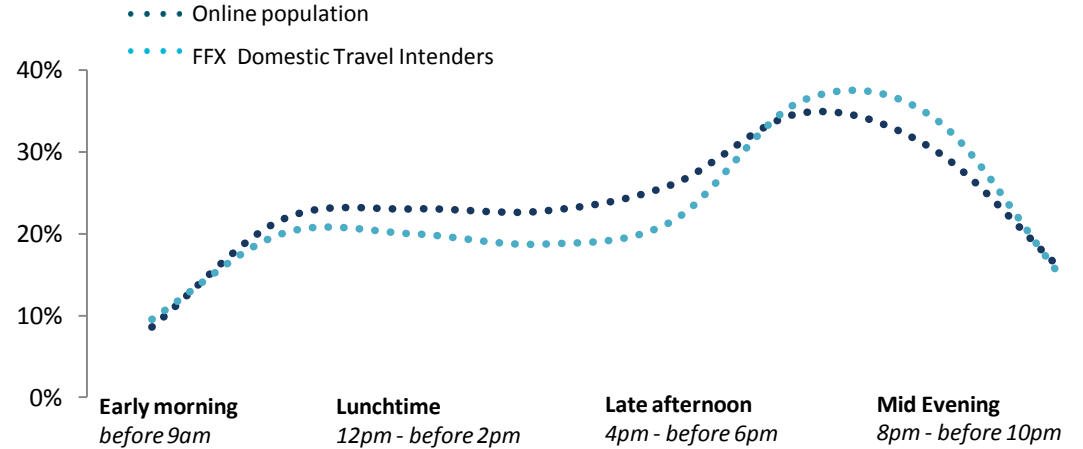
DEMO

Source: Nielsen Australian Connected Consumer Report, February 2014. Based on Australian Online Population 16yrs+, n=4,980 and Fairfax Digital Intending Domestic travel in the next 6 months, n=797. ~Nielsen, hybrid, May 14, based on Fairfax Media's Digital Sites

KEY FOR ALL CHARTS:



TIME OF DAY RESEARCH / PURCHASE OF TRAVEL ITEMS IS CONDUCTED*



1



Lounge time is
prime travel
research time

88%

accessed travel information
online in the last 12 months;
29% access at least weekly.

DEVICES USED TO ACCESS TRAVEL INFORMATION^

2



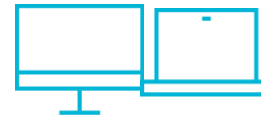
Tablet & Travel
go hand in hand

61%

accessed travel content via a
mobile device.

42%

more likely than the online
population to access information on
a tablet.



80%

82%



50%

40%



27%

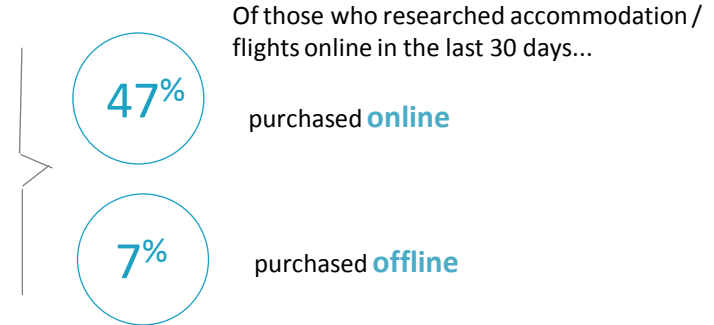
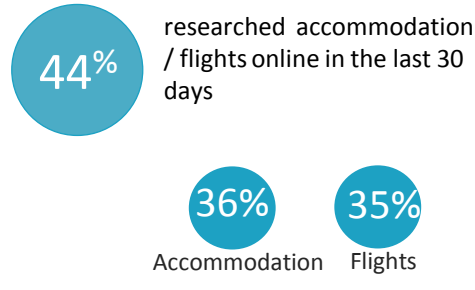
19%

KEY FOR ALL CHARTS:



3  **Online travel research driving online purchase**

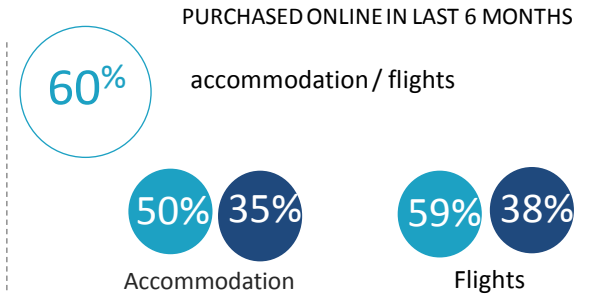
Half who have researched travel online are purchasing these items online; 7 times more likely to be converting online than offline.



4  **High propensity to purchase travel online**

No.1 Travel is the online category with the highest purchase level in the past 6 months*.

9-in-10 prefer to purchase big ticket items (i.e. airline tickets, accommodation) on a desktop / laptop device.



KEY FOR ALL CHARTS:



The Tourism Victoria 'Spotted by Locals' cross platform campaign was designed to shed light on local hidden gems found in the hometowns of a group of well known Victorians. The campaign showcased their experiences through a digital hub on The Age Traveller site offering image articles, image galleries and video content and was also supported through a print and tablet campaign.

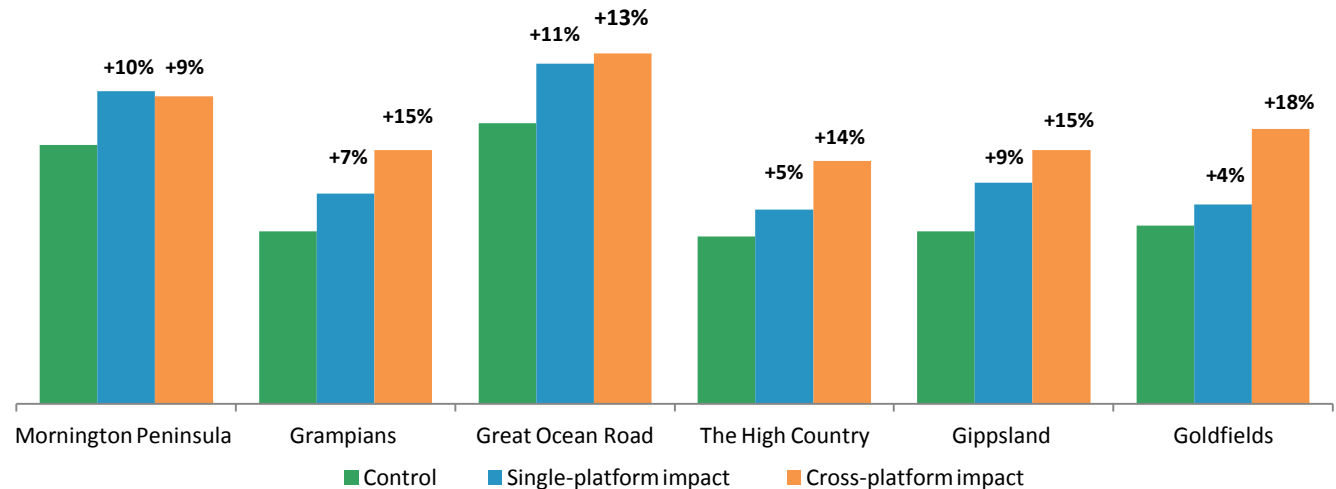
The campaign proved to be very successful;

- 1) Exposure to multiple campaign elements drove higher visitation intention, with some regions experiencing quadruple growth
- 2) Cross-platform exposure was over twice as effective at driving campaign recall (single media campaign recall was 17% compared to a cross-platform campaign recall of 42%)



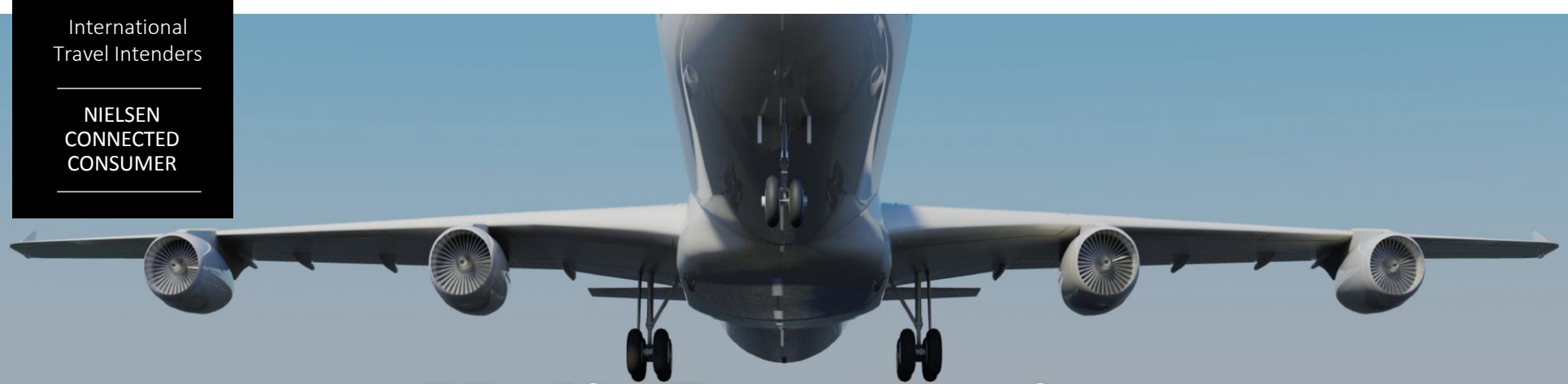
5

Cross platform
campaign
exposure
significantly
increases recall
for travel
advertisers



International
Travel Intenders

NIelsen
CONNECTED
CONSUMER



Media Consumption

OF FAIRFAX DIGITAL'S INTERNATIONAL TRAVELLERS

Fairfax Media



37% (2.6million~)

of Fairfax's Digital audience intend to travel overseas within the next 6 months



46%

GENDER



54%

18-34 | 37%

35-54 | 34%

55+ | 27%

AGE



34%
HHI \$110K+



26%
CHD <18YRS IN HH

DEMO

Source: Nielsen Australian Connected Consumer Report, February 2014. Based on Australian Online Population 16 yrs+, n=4,980 and Fairfax Digital International Travel Intenders (intend to travel overseas within the next 6 months), n=730. ~Nielsen, hybrid, May 14, based on Fairfax Media's Digital Sites

KEY FOR ALL CHARTS:

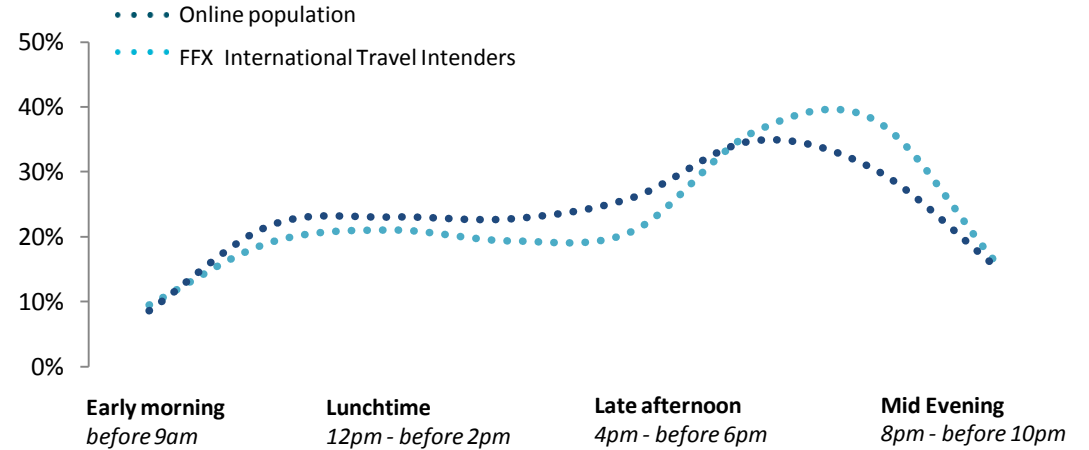


FFX
International
Travel
Intenders



Online
Population

TIME OF DAY RESEARCH / PURCHASE OF TRAVEL ITEMS IS CONDUCTED*



1



Travel
exploration
dominates
couch time

60%

access travel information online at least monthly, 1-in-3 access at least weekly.

82%

of the time spent watching TV is done so while accessing the internet.

2



Mobile devices
at forefront for
accessing travel
content

63%

accessed travel content via a mobile device.

37%

more likely to access travel content on a tablet than online population.

DEVICES USED TO ACCESS TRAVEL INFORMATION^



78%

82%



50%

40%



26%

19%

KEY FOR ALL CHARTS:



FFX
International
Travel
Intenders



Online
Population

3



Travel
inspiration is
driven by
online videos

Half

of those researching travel
consume online videos at least
monthly relating to the product
categories they're thinking of
purchasing.

15%

more likely to watch online video at
least monthly for researching travel
than online population.

FREQUENCY OF WATCHING VIDEOS TO RESEARCH TRAVEL*



At least Monthly

Within last 12 months

4



Online travel
research
driving online
purchase

Half

of those who have
researched travel items
online are purchasing
online.

43%

researched
accommodation / flights
online in the last 30 days

Of those who researched accommodation / flights
online in the last 30 days...

50%

purchased **online**

7%

purchased **offline**

KEY FOR ALL CHARTS:



FFX
International
Travel Intenders



Online
Population



5

**High
propensity to
purchase travel
online**

No.1

Travel is the online category with the highest purchase level in the past 6 months*.

9-in-10

prefer to purchase big ticket items (i.e. airline tickets, accommodation) on a desktop / laptop device.

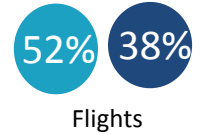
\$2,069

Amount spent on flights / accommodation online in last 30 days

60%

PURCHASED ONLINE IN LAST 6 MONTHS

accommodation / flights



6



High impact ad
executions
help shift
brand metrics

Expedia partnered with Fairfax Media to increase awareness of Expedia and promote it as the travel site that is a one-stop-shop for all things travel. This was executed through a high impact full page video executions on the masthead homepages and integration into the Traveller site through a chameleon creative execution.

The campaign proved to be very successful;

- 1) Strong upward lifts across aided brand awareness, online advertising recall, brand favourability and brand consideration.
- 2) Outperformed norms in terms of brand consideration, with the uplift for consideration being in the top 20% of online travel campaigns when compared to global benchmark norms for this category.



Overall campaign effect	Total Sample	Total Sample (Masthead HP / Article Buyout)	Target Audience (Masthead HP / Article Buyout)
Aided Brand Awareness	+4% pts	+6% pts	+5% pts
Brand Favourability	+2% pts	+7% pts	+6% pts
Brand Consideration	+6% pts	+10% pts	+13% pts

For more information please
contact your Fairfax Media
sales representative