

## European Airlines confound gloomy predictions following September 11<sup>th</sup> to enjoy growth online of over 100%

Airline websites are more popular than ever in Europe, according to the latest research from Nielsen//NetRatings. Following September 11, the last quarter of 2001 saw the travel sector struggling economically, and there was speculation that the airline operations would be hit by a downturn. But the latest research revealed that the European airlines sector has more than doubled its online audience since last October, with 118% growth in 10 months.

### Nielsen//NetRatings: Growth of Online Airline Audience, Oct 2001-July 2002, at home panels

| Country        | Airlines Audience Growth | All Travel Audience Growth |
|----------------|--------------------------|----------------------------|
| France         | 230%                     | 135%                       |
| Germany        | 179%                     | 142%                       |
| Italy          | 56%                      | 139%                       |
| Sweden         | 20%                      | 27%                        |
| United Kingdom | 89%                      | 112%                       |

In France and Germany, the growth of airline sites has outstripped the growth of travel sites overall. In the case of Germany this is due to Lufthansa, which has grown rapidly in the last year to become Europe's leading online airline. In the UK, Ryanair, British Airways, and Easy Group, which includes Easyjet, experienced an increase in audience.

[Continued below]

### Nielsen//NetRatings Top 10 Airlines in Europe by Year-on-Year Growth, July 2002.

| Property                     | Year on Year Growth % | Reach % (Active) | Unique Audience | Rank | Page Views | Pages Per Person | Time Per Person | Country |
|------------------------------|-----------------------|------------------|-----------------|------|------------|------------------|-----------------|---------|
| Lufthansa                    | 442                   | 1.89             | 1,356,966       | 1    | 25,034,783 | 18               | 00:13:36        | Germany |
| British Airways              | 170                   | 0.93             | 664,434         | 2    | 10,653,790 | 16               | 00:14:22        | UK      |
| KLM                          | 137                   | 0.85             | 611,980         | 3    | 5,797,896  | 9                | 00:05:44        | Nlands  |
| Ryanair                      | 133                   | 1.36             | 974,712         | 4    | 16,916,082 | 17               | 00:11:46        | UK      |
| British Midland              | 132                   | 0.29             | 206,347         | 5    | 2,310,515  | 11               | 00:13:00        | UK      |
| Easy Group                   | 73                    | 1.01             | 724,721         | 6    | 10,042,455 | 14               | 00:13:04        | UK      |
| Air France                   | 62                    | 0.29             | 206,440         | 7    | 5,716,686  | 28               | 00:16:15        | France  |
| Go Fly                       | 56                    | 0.59             | 422,411         | 8    | 6,766,413  | 16               | 00:13:35        | UK      |
| Alitalia                     | 16                    | 0.32             | 230,240         | 9s   | 6,298,885  | 27               | 00:11:44        | Italy   |
| Scandinavian Airlines System | N/A                   | 0.17             | 120,378         | 10   | 2,378,233  | 20               | 00:17:30        | Sweden  |

Travel brands like Lastminute and Expedia have remained popular across Europe, with Lastminute being in a position to report profitability recently. However, whilst both Expedia and recent market entrant Opodo have experienced strong growth in the last 12 months, the Lastminute brand itself has not seen anything like the same levels of growth, but its recent purchase of travelselect.com, which experienced a year-on-year growth of 127% strengthens its market share.

### Nielsen//NetRatings Year-on-Year Growth of Key European Travel Brands, July 2001-July 2002, home panels

| Property         | Year-On-Year Growth | Unique Audience | Page Views | Pages Per Person | Time Per Person |
|------------------|---------------------|-----------------|------------|------------------|-----------------|
| travelselect.com | 127%                | 338,844         | 3,269,582  | 10               | 00:04:58        |
| lastminute.com   | 17%                 | 1,939,479       | 32,498,414 | 17               | 00:10:00        |
| expedia.com      | 110%                | 336,326         | 2,475,909  | 7                | 00:03:21        |
| expedia.co.uk    | 116%                | 799,216         | 11,543,091 | 14               | 00:07:54        |
| ebookers.com     | 5%                  | 426,976         | 3,689,318  | 9                | 00:05:04        |
| lastminute.de    | -20%                | 272,484         | 11,885,897 | 44               | 00:10:34        |
| expedia.de       | N/A                 | 301,643         | 2,555,646  | 8                | 00:04:11        |
| opodo.de         | N/A                 | 500,405         | 2,156,470  | 4                | 00:02:11        |
| opodo.co.uk      | N/A                 | 352,551         | 2,845,562  | 8                | 00:04:54        |
| opodo.fr         | N/A                 | 226,860         | 1,258,925  | 6                | 00:03:00        |

Tom Ewing, European Analyst at Nielsen//NetRatings says "The online airline sector has confounded most of the predictions made at the end of last year. Travel sites in general in Europe are recovering from the economic and tourism downturn, and the airline sector in particular is booming.

What's interesting is that the fastest-growing sites – Lufthansa, BA and KLM – are all the sites of well-established non-budget airlines. This again defies predictions that the online market would continue to be dominated by budget airlines: it's the full price sector that is doing best at the moment, and Lufthansa has overtaken the low-cost operators to become the European market leader. Consumers still want cheaper flights, as the success of travel portals shows, but they can get those flights now from a range of operators, not just 'budget' airlines."

Ewing believes "this shows that the established airlines are more web-savvy now, more competitive on price, as well as on reliability and customer care issues, enabling them to compete more effectively with the budget online airlines."

**Nielsen//NetRatings will be holding a European Analyst call on the online travel sector on 3<sup>rd</sup> October for clients, prospects and the press. For more information, please contact [lucy.green@eratings.com](mailto:lucy.green@eratings.com)**

**Please source all information to Nielsen//NetRatings**

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**About Nielsen//NetRatings**

Nielsen//NetRatings is the leading global provider of Internet audience research, providing up-to-date, accurate and comprehensive information and analysis to help clients understand consumer behaviour and trends online, as well as advertising effectiveness and brand preferences.

In Europe, the company has panels of consumers, which use software to continuously and unobtrusively measure their behaviour online. These panels are in the UK, France, Germany, Spain, Italy, the Netherlands and Sweden. The panel methodology collects detailed demographic data on each person, ensuring that companies can understand and target their consumers effectively and identify new target audiences.

Nielsen//NetRatings regularly reports the behaviour of Internet users across the world, using its panels in 16 countries in North America, Australia, Asia and Europe. In addition to the Nielsen//NetRatings audience measurement service, the company also provides analytical reports on international markets and trends, and has just launched the only global online advertising media planning service, WebRF. For more information, please visit [www.nielsen-netratings.com](http://www.nielsen-netratings.com)