



Nine

WHERE AUSTRALIA CONNECTS

Audience Insights Tracker
As at 27 April, 2020

In Summary



Linear TV

Nine maintains its dominance as Australia's preferred demographic network for primetime, driven by trusted news and current affairs, and premium entertainment content.

Nine continues to reach new audiences across all key demos, with +1.7 reach points for P25-54 in the last month compared to previous.

Extended time spent at home is seeing increased engagement on linear TV year-on-year, with P25-54 spending 11 more minutes a week viewing primetime content on Nine.

Infomer 3838 launched as Australia's number one new drama with an average audience of 915k.

BVOD

9Now continues to be the leading CFTA BVOD platform with a year-to-date share of 50% in total minutes.

Furthermore 9Now has ranked as the leading CFTA BVOD platform for 15 out of 17 weeks (YTD) for both live and VOD minutes weekly share.

As viewers continue to turn to entertainment for an escape during the current global pandemic, family favourite *LEGO Masters S2* continues to captivate audiences taking the top two spots for live viewing last week.

Digital & Publishing

Dwell times on all Nine's digital news sites delivered double digital growth in March, a reflection of audiences turning to trusted news sites for up-to-the minute information.

As audiences look to inspiration at home *9Honey*, *Traveller* and *Good Food* are connecting with Australians, providing content to indulge their passions across health, food and travel.

Nine's Consumer Pulse survey spanning readers of the *Herald*, *The Age*, *The Australian Financial Review*, and subscribers to the 9Nation panel continues to reveal a general improvement in mood and overall consumer sentiment.

Radio

Audiences continue to turn to Nine Radio for trusted voices and platforms where they can voice their own opinions. The second GfK Radio Survey of 2020 has seen 2GB, 3AW, 4BC and 6PR post significant audience growth during the COVID-19 crisis.

Nine Radio has had 1.45M podcast downloads to date, and a 16% increase in downloads month to date.

GfK's COVID-19 radio user survey has found that 72% of respondents trust radio to give up-to-date information about COVID-19 and 64% say radio keeps them connected with the local community.

CONSUMER PULSE

powered by:

As at 27.04

The fifth instalment of Nine's Consumer Pulse sees Australians embracing a sense of optimism and desire for a better future. This week negative emotions are trending down; positive emotions are trending up. The national mood has steadied with only 3 in 10 now feeling "extremely or very concerned."

Consumers are getting on with the job, finding a groove in their new home lives armed with individual coping strategies and an openness to new media and content genres.

Macro Themes

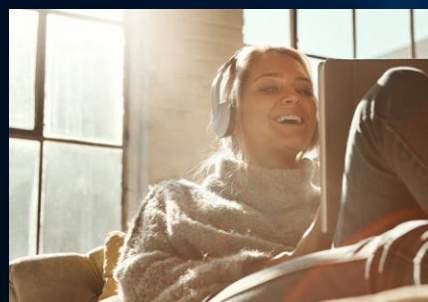


Getting on with the job

Australians are accustomed to their COVID-19 living situation, and are finding a groove, armed with individual coping strategies and a sense of self-reliance.

Brand implication

Marketers can appeal to Australian values of resilience, independence, ingenuity and resourcefulness which are finding news forms and expressions.



Expanding horizons, at home.

Australians are taking the opportunity to explore new content genres, media and technology to enhance their lives during this period and beyond.

Brand implication

It has never been more vital to explore a diverse range of content platforms to connect with consumers.

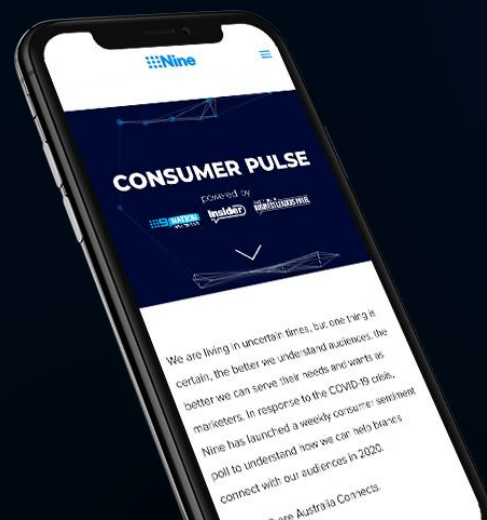


Justified spend

Australians are living more frugally, but also looking for ways to help the economy and the community.

Brand implication

Brands can highlight ways to ensure consumers' money goes further, encouraging spend with local businesses and support of key categories.



View the complete Consumer Pulse results at nineforbrands.com.au

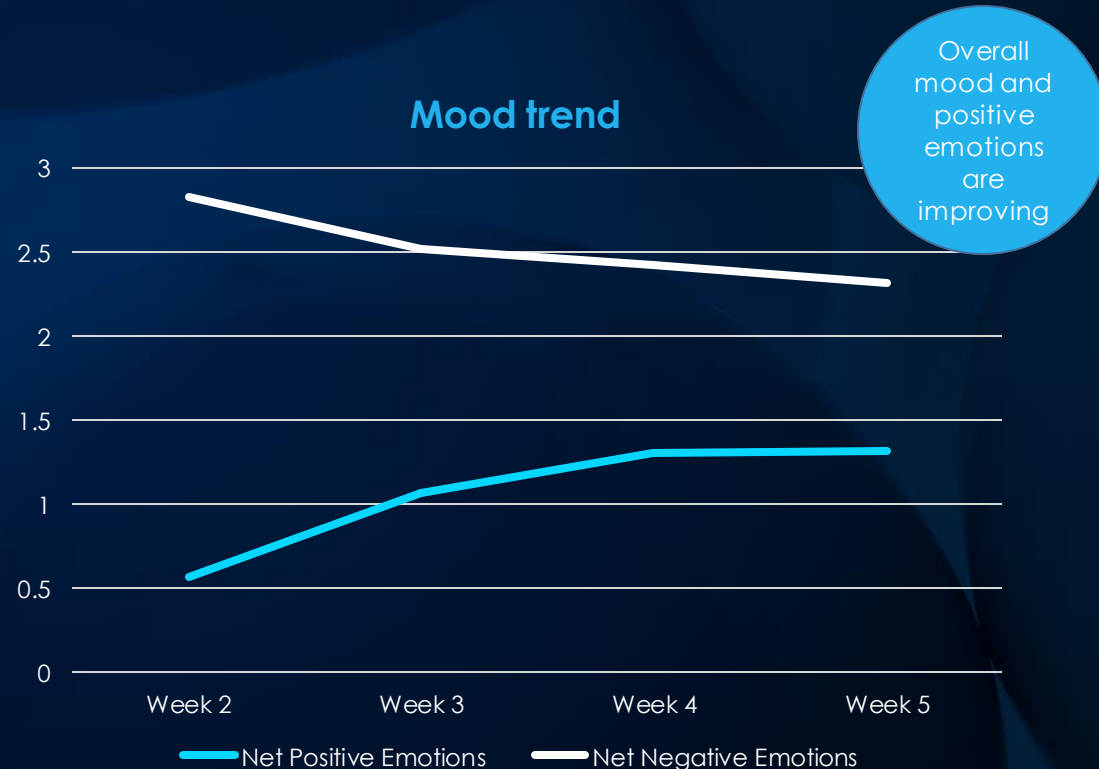
CONSUMER PULSE

As at 27.04.2020

Mood tracker

Hope is the leading emotion this week. Negative emotions are trending down, positive emotions are trending up. The national mood has steadied with only 3 in 10 now feeling 'extremely or very concerned'.

Hopeful 34%	Frustrated 29%	Optimistic 21%	Bored 20%	Stressed 19%
Isolated 33%	Unsure 26%	Safe 18%	Pessimistic 12%	Encouraged 12%
Anxious 31%	Calm 25%	Annoyed 17%	Connected 12%	Relaxed 11%
		Hesitant 13%	Fearful 11%	Overwhelmed 11%
			Confused 11%	Sceptical 10%



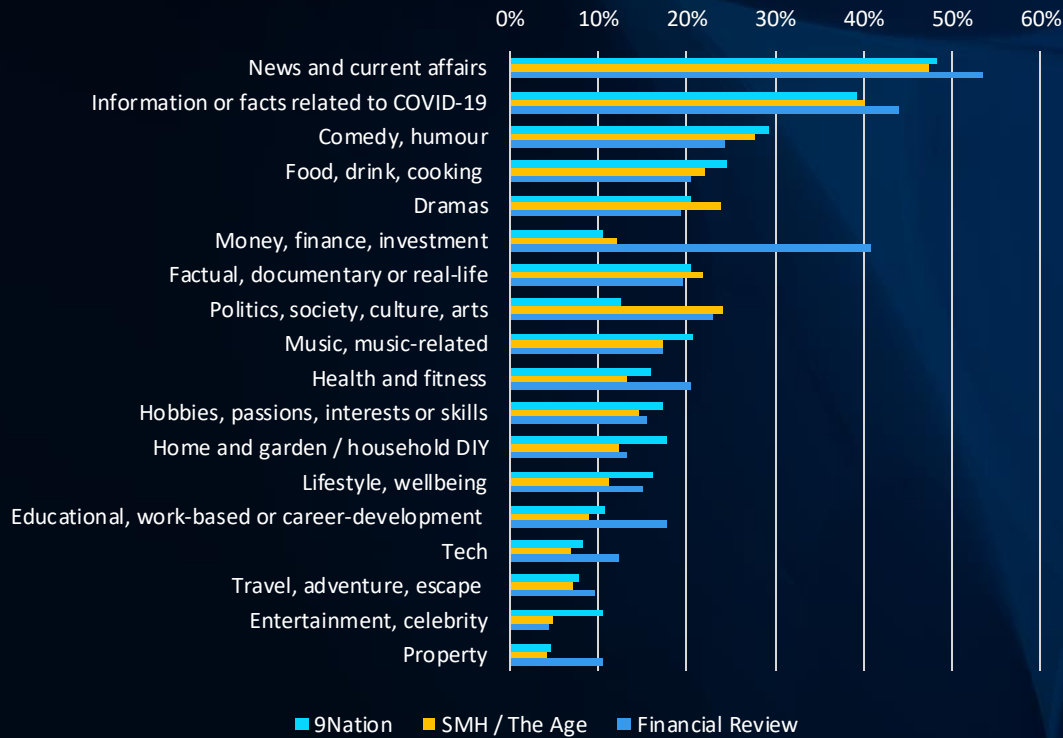
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CONSUMER PULSE

As at 27.04.2020

Exploring new content

Audiences are taking the opportunity to widen their horizons in terms of genre consumption - opening up new audiences and content opportunities for advertisers.



Impact on consumer spending

Nine audiences are consistently concerned about the economy and 59% are taking measures to save money. However some 4 in 5 are looking for ways to show support and there is openness to spend in key categories.

81% would like to do what they can to support the economy.

92% have
shopped online in
the past few
weeks.

More than 1 in 3
intend to increase
online shopping in
the next few
weeks.

online purchases include
household items (60%),
home-delivered meals
(43%) and streaming
services (21%).

DIY Projects

40% expressed interest in doing DIY projects during restrictions, with spend on hardware and gardening supplies, furniture and kitchen appliances growing accordingly

Thinking locally

Some 90% would like to support their local stores and small businesses, recognising the adverse impact of this period on SMEs.

View the complete Consumer Pulse results at nineforbrands.com.au

CONSUMER PULSE

w/c 27.04.2020

A time for trusted media

Media consumption has increased across platforms

71%
significantly
increased news
and current
affairs
consumption

63%
are watching
more TV

50%
are using more
streaming
services.

80% trust Nine's assets to bring them timely and accurate updates – whether via TV, Digital, Print or Radio

Nine News is the most trusted TV program for the latest and most accurate updates, and audiences place significantly more trust in Nine's online sites (nine.com.au, smh.com.au, theage.com.au, afr.com etc) than in social media platforms (Facebook, YouTube, Google, Twitter).

A better future

As the situation develops some diverging audience sentiments are emerging. There are those who want things to get 'back to normal', those who want to see material change as Australia moves forward.

Many are expressing a desire for more community-mindedness, a focus on the greater good and an increased sense of self-sufficiency in Australia.

"A society that is more respectful of the impact of the individuals' actions on the larger group."




"More care for the environment and each other."

"A more compassionate, connected and more 'human' experience. Better ongoing economic security for Australia, from Australia."

"A total reset is needed across the world and hopefully this is it."

View the complete Consumer Pulse results at nineforbrands.com.au

Nine is Australia's preferred network for all key demos

2020 CALENDAR YEAR TO DATE PRIME TIME COMMERCIAL SHARE	 NETWORK	 NETWORK	 NETWORK
P25-54	40.50%	31.20%	28.30%
P16-39	40.50%	30.70%	28.80%
GS+CH	40.80%	34.80%	24.40%
TOTAL PEOPLE	40.70%	34.80%	24.50%

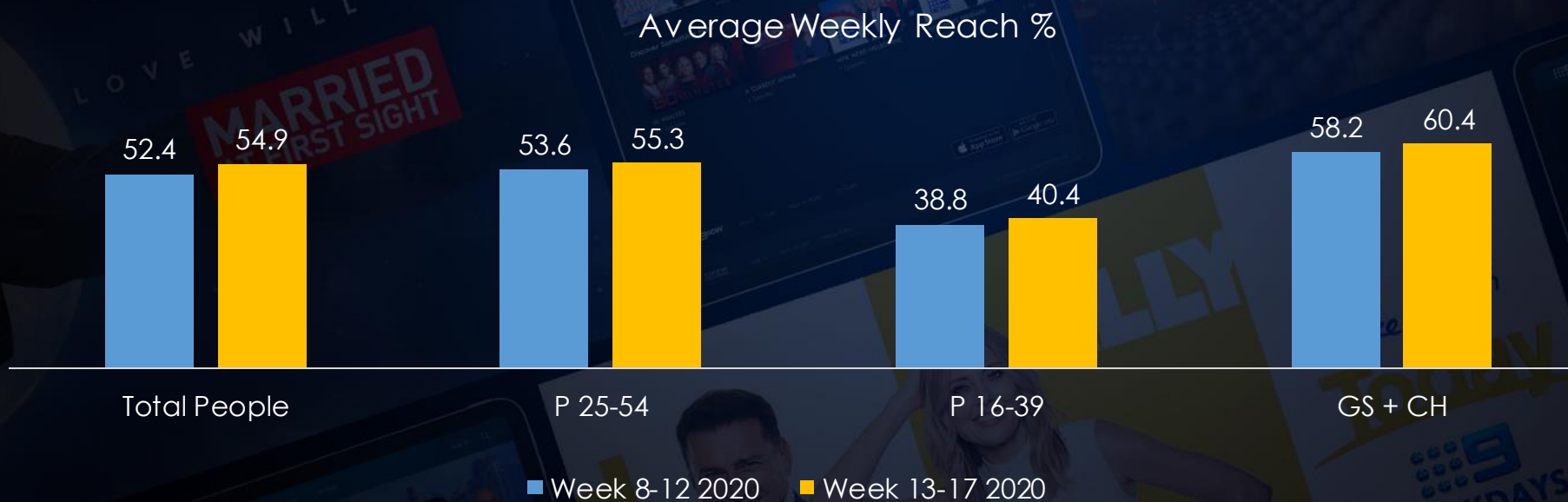
Nine is Australia's preferred Network post Easter for all key demos



POST EASTER WEEK 1 PRIMETIME COMMERCIAL SHARE			
P25-54	39.2%	30.7%	30.1%
P16-39	36.5%	30.5%	33.0%
GS+CH	41.0%	30.2%	28.7%
TOTAL PEOPLE	39.4%	34.2%	26.4%

Nine continues to reach new audiences across all key demos

Network Nine's average weekly reach has increased across 5 city metro across all key demos (Weeks 13-17 v 8-12)



+1.7 reach pts P25-54

+1.6 reach pts P16-39

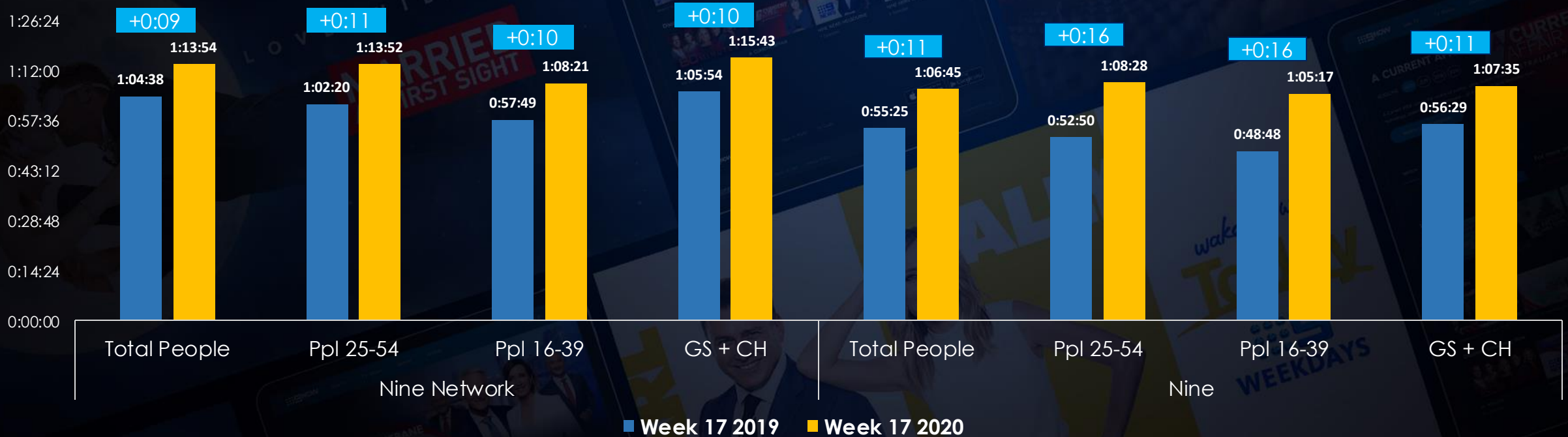
+2.2 reach pts GS+CH

+2.5 reach pts Tll people

Extended time spent at home is seeing increased engagement on linear TV across all key demos

Primetime time spent viewing is up YoY for Network Nine and Nine Primary across the Metro 5 City for all key demos (Week 17 2020 YoY)

Primetime Time Spent Viewing (Viewing/Viewer)



LEGO Masters launches as highest reality TV premiere of 2020 and Informer 3838 as Australia's no. 1 new drama



1.6 MILLION AVERAGE VIEWERS
1.19m metro | 410k regional
Series to date

HIGHEST REALITY TV PREMIER OF 2020

TIMESLOT FAVOURITE
All key demos

915K AVERAGE VIEWERS
644k metro | 271k regional

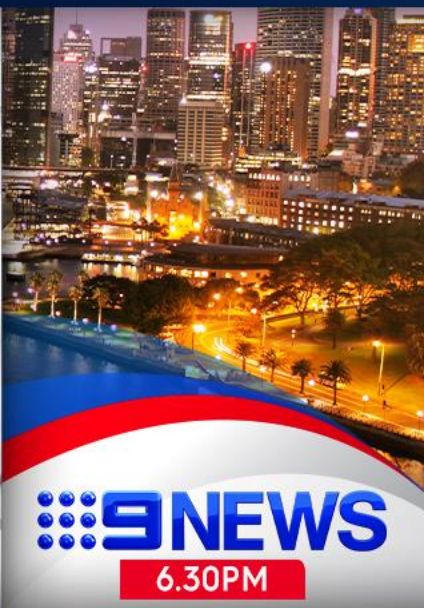
AUSTRALIA'S NO.1 NEW DRAMA

TIMESLOT FAVOURITE
All key demos

TIMESLOT COMMERCIAL SHARE	LEGO MASTERS	7	10
P25-54	47.0%	18.2%	34.8%

TIMESLOT COMMERCIAL SHARE	INFORMER 3838	7	10
P25-54	56.1%	22.4%	21.5%

Trusted news content proving to be more important than ever



WEEKLY METRO GROWTH YOY

↑ P25-54: **+24.77%**
 P16-39: **+35.10%**
 GS + CH: **17.26%**
 Total People: **+13.82%**

WEEKLY METRO GROWTH YOY

↑ P16-39: **+7.61%**
 Total People: **+0.27%**

WEEKLY METRO GROWTH YOY

↑ P25-54: **+31.94%**
 P16-39: **+40.10%**
 GS + CH: **+41.76%**
 Total People: **+27.01%**

WEEKLY METRO GROWTH YOY

↑ P25-54: **+25.54%**
 P16-39: **+42.00%**
 GS + CH: **+35.18%**
 Total People: **+22.66%**

WEEKLY METRO GROWTH YOY

↑ P25-54: **+15.53%**
 P16-39: **+42.14%**
 GS + CH: **+19.00%**
 Total People: **+13.00%**

WEEKLY METRO GROWTH YOY

↑ P25-54: **+85.98%**
 P16-39: **+157.64%**
 GS + CH: **+99.79%**
 Total People: **+24.92%**

RUSH

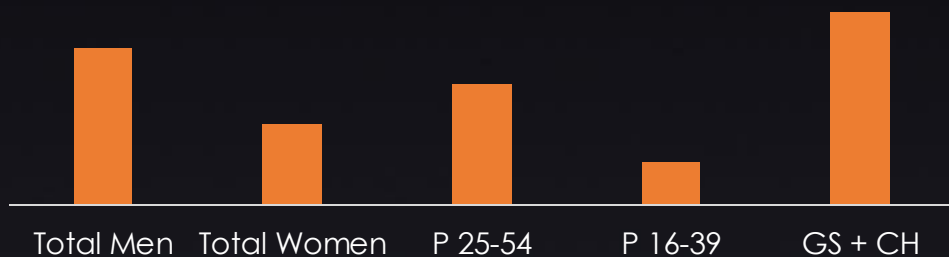
AUSTRALIA'S NEW MALE REALITY OBSESSION DRIVES AUDIENCE GROWTH

2.894 MILLION TUNE IN TO 9RUSH ACROSS FIRST THREE WEEKS

- P25-54: **17.5%** reach
- P16-39: **10.4%** reach
- Total Men: **17.4%** reach
- M25-54: **18.3%** reach
- M16-39: **10.0%** reach

FULL DAY AUDIENCE PROFILE

Week 3 of 9Rush – Sun - Sat



FULL DAY AVG. AUDIENCE GROWTH - WEEK 3 vs LAUNCH WEEK

- P25-54: **+24.3%**
- P16-39 **+31.8%**
- M25-54: **21.1%**
- Total People: **+24.7%**

TOP PROGRAMS WEEK 3



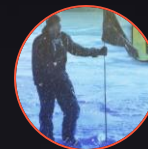
Street Outlaws: Memphis - EV

- Avg. audience: **44,659**
- P25-54: **54.9%**
- Men: **64.6%**
- Women: **35.4%**



Misfit Garage - EV

- Avg. audience: **41,513**
- P25-54: **59.9%**
- Men: **63.6%**
- Women: **36.4%**



Bering Sea Gold – EV

- Avg. audience: **42,205**
- P25-54: **53.6%**
- Men: **59.4%**
- Women: **40.6%**



PLUS MANY MORE BIG INTEGRATION
MOMENTS ON  **Nine**

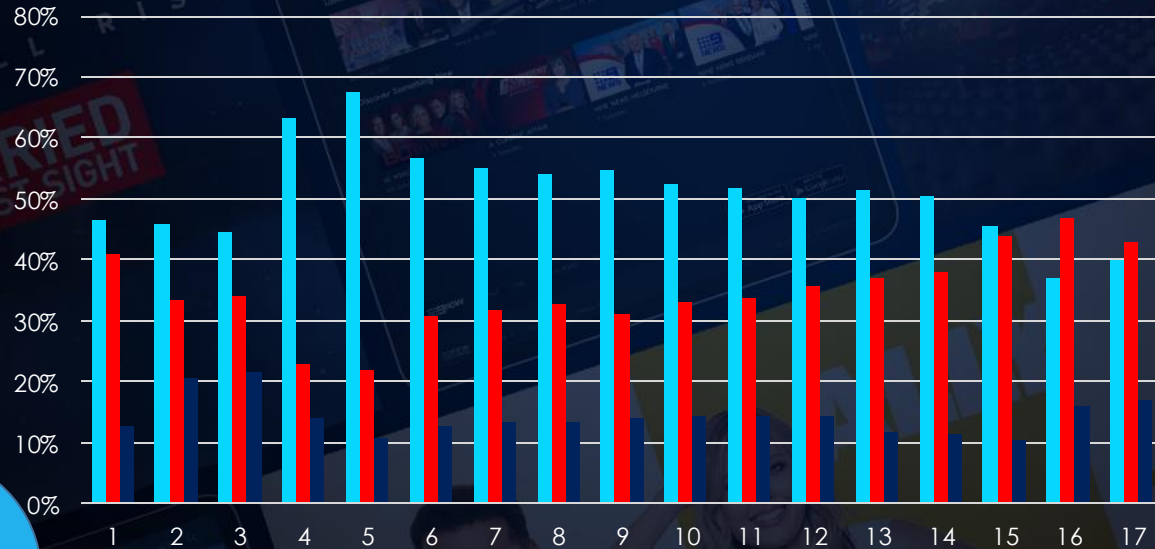


The leading CFTA BVOD platform

With 50% CFTA share of minutes YTD.

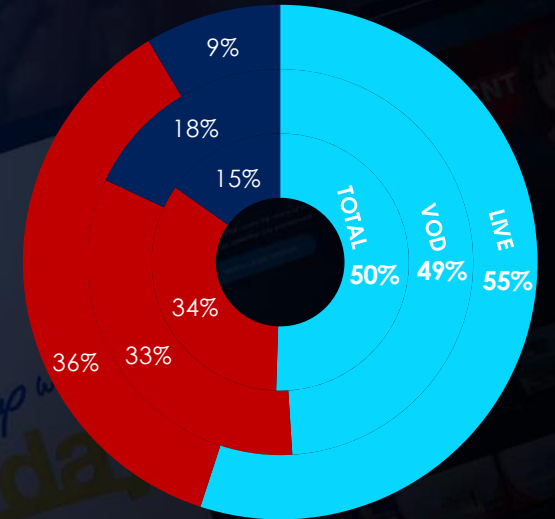


CFTA weekly share total minutes



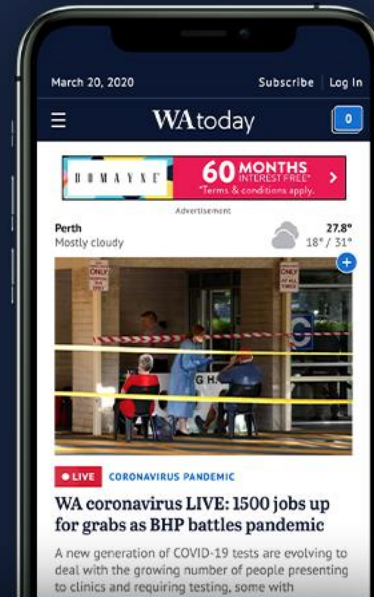
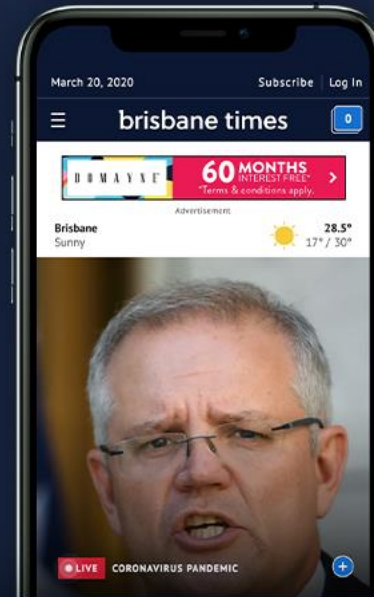
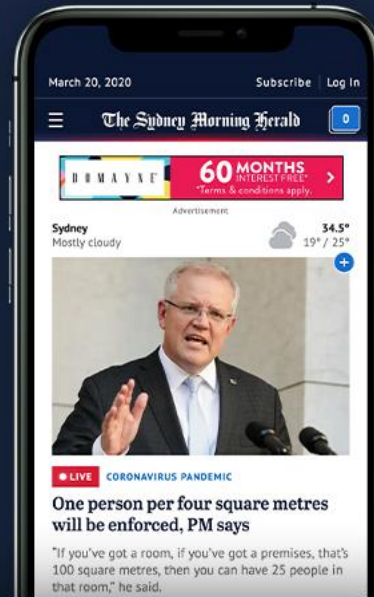
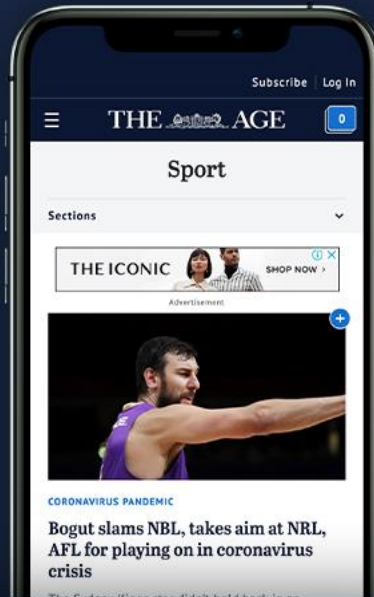
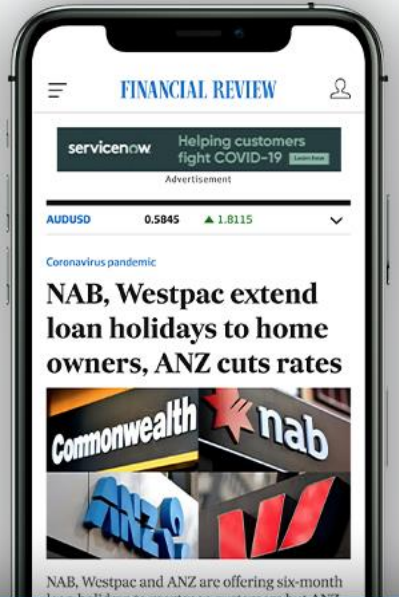
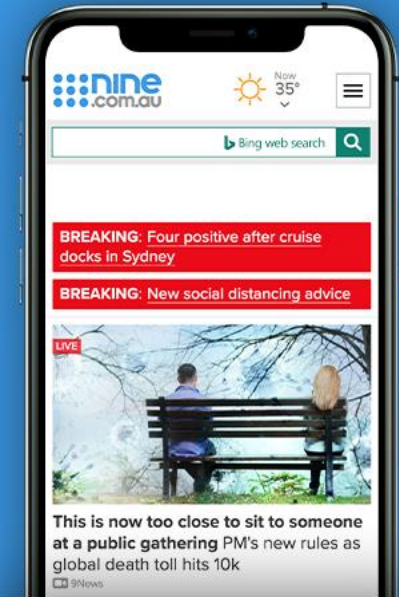
9Now wins 15 of 17 weeks YTD

Minutes share YTD



An unrivalled network of news content, with growing audiences.

MOM audience growth March 2020.



FINANCIAL REVIEW

THE AGE

The Sydney Morning Herald

brisbane times

WA today



March Vs Feb 2020
 Average daily UA +39%
 Time spent +54%
 Page Views +38%

March Vs Feb 2020
 Average daily UA +104%
 Time spent +80%
 Page Views +95%

March Vs Feb 2020
 Average daily UA +45%
 Time spent +53%
 Page Views +58%

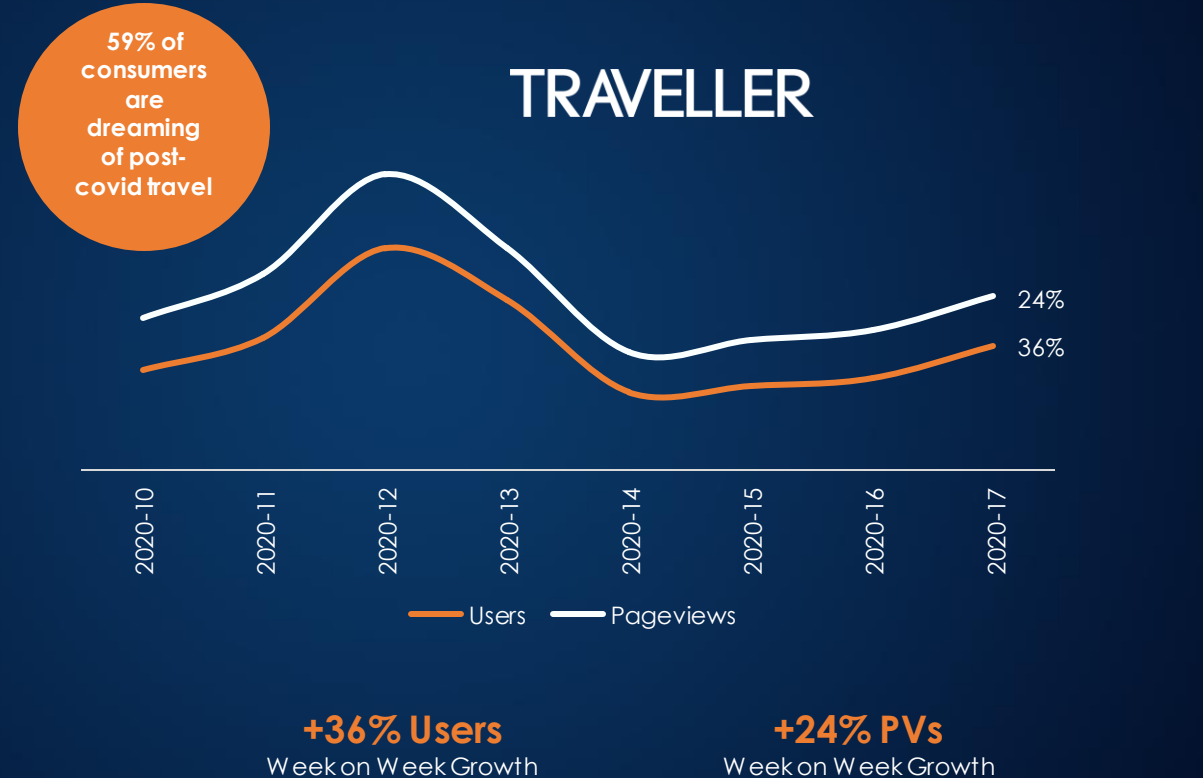
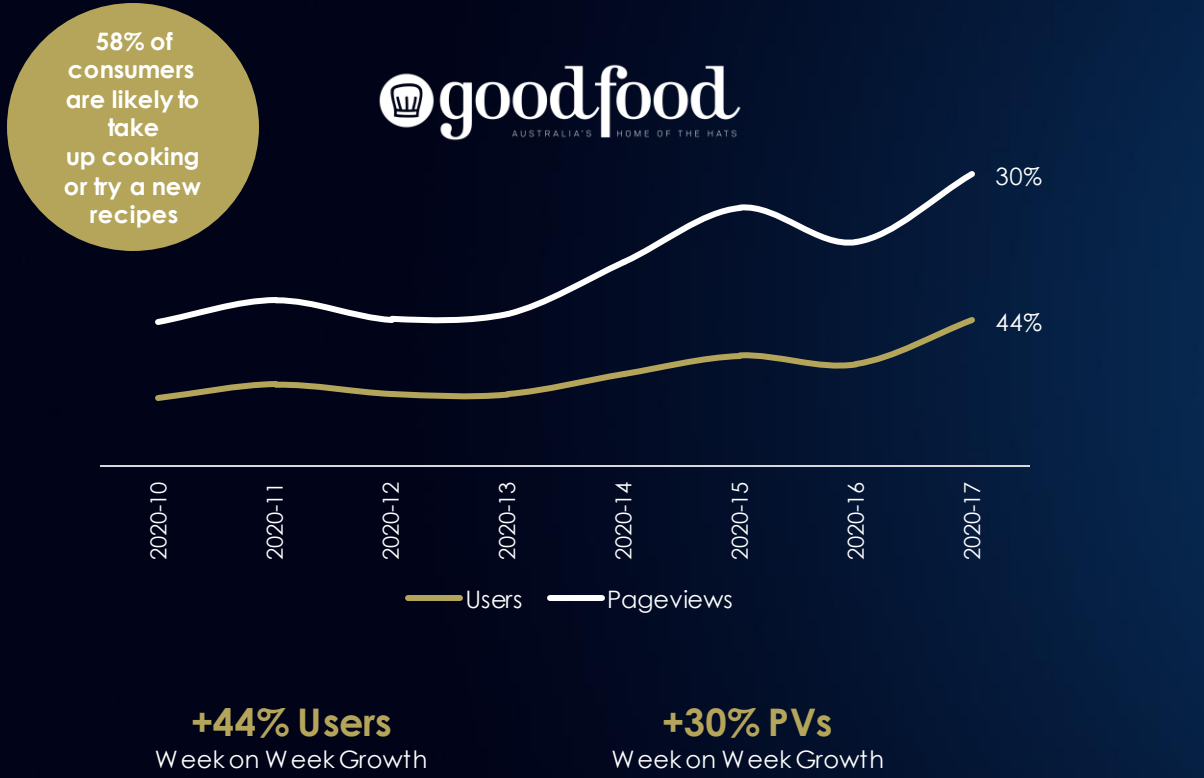
March Vs Feb 2020
 Average daily UA +71%
 Time spent +61%
 Page Views +61%

March Vs Feb 2020
 Average daily UA +37%
 Time spent +62%
 Page Views +57%

March Vs Feb 2020
 Average daily UA +109%
 Time spent +182%
 Page Views +153%

Lifestyle content to indulge food passions and inspire travel dreaming

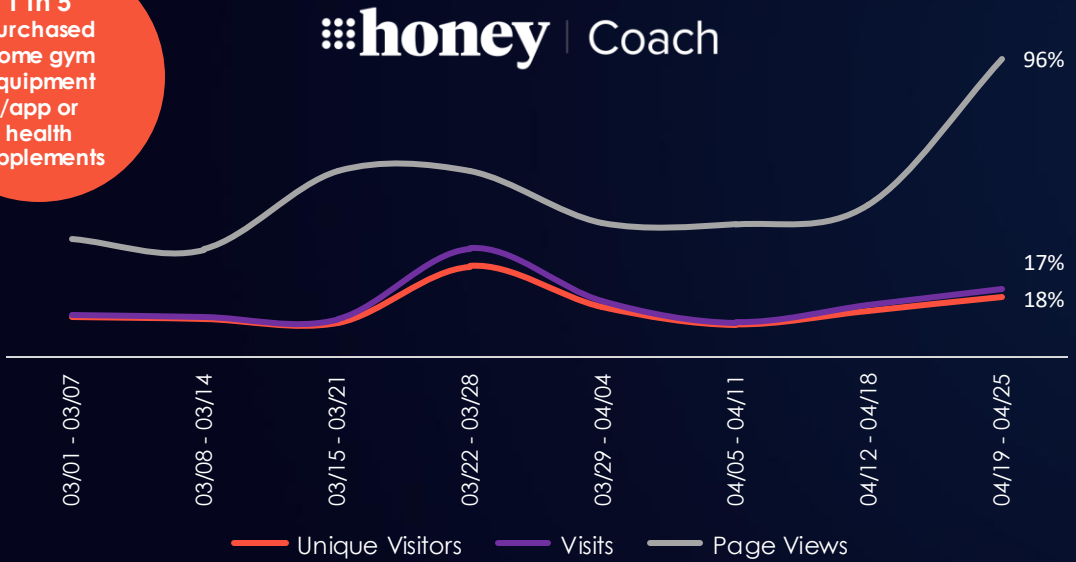
As Australians look to escape heavier news content, they are indulging their passion for food and dreaming of their next travel adventure with growth week-on-week across both platforms.



9Honey is connecting and inspiring during a time of uncertainty

9Honey is connecting with millions of Australians with content to inspire and motivate, with isolation-fitness driving double-digit growth across 9Honey Coach.

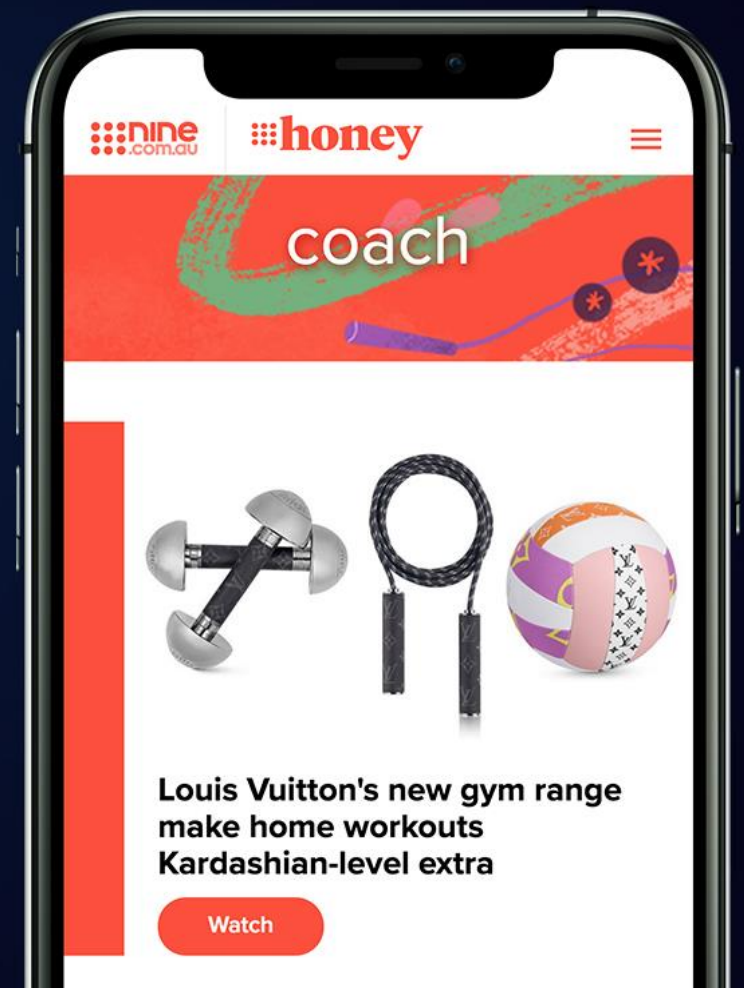
1 in 5 Purchased home gym equipment /app or health supplements



+27% UVs
Week on Week Growth

+31% Visits
Week on Week Growth

+96% PVs
Week on Week Growth



Source: Adobe Analytics, 9Honey Network, 01/03/20 - 25/04/20. Source: 9Nation & Insider - Consumers during COVID 19 Wave 1

Audiences still seeking trusted independent journalism

Online engagement

Live coverage blog is still dominating the top 10 most-read - accounting for a quarter of all PVs in Mar-Apr.

Digital subscriptions

Acquisition of new digital subscribers to *The Herald*, *The Age* and *Financial Review* remains well above usual benchmark levels.

On *The Herald* and *The Age*, we've seen a significant increase in uptake of our Premium Digital package, as consumers look to engage with the digital version of Today's Paper, as well as build on longstanding newspaper habits like crosswords.

Retail sales

Overall, circulation and retail sales have been impacted by the reduction in retail operations, however Supermarkets are performing stronger than other channels.

Print subscriptions

We also continue to see elevated acquisition of digital + home delivery subscribers, particularly Weekend packages and 7-day.



Engagement across all channels.

From positive stories in the Good News Group to exclusive COVID-19 newsletters driving engagement above industry standards, readers are engaged across all platforms.

Independent news driving reader and subscriber engagement

Readers and subscribers engaging directly via article comments across the Herald and The Age.



Subscriber engagement w/c 19th April 2020.

	Page views	Article page views	Homepage landers	Sessions
April WOW	+3.2%	+3.1%	+2.7%	+2.7%

The Sydney Morning Herald

THE AGE

WAtoday

brisbane times

More Australians turn to Nine Radio

The number one network among audience 40+

The second GfK Radio Survey of 2020 saw 2GB, 3AW, 4BC and 6PR post significant audience growth as audiences turned to talk radio during the COVID-19 crisis.



Sydney's #1 Station

2GB remains – #1 (AM and FM) across Breakfast, Mornings, Afternoons, Drive, Evenings, Overnights and Weekends – recording its 127th consecutive survey win with an audience share of 14.8% up 1.6 points.



Melbourne's #1 Station

3AW 693 lifts its audience while retaining its #1 position as Melbourne's most listened to radio station (AM and FM) with an audience share of 13.9% up 0.6 points.



Growth in Brisbane

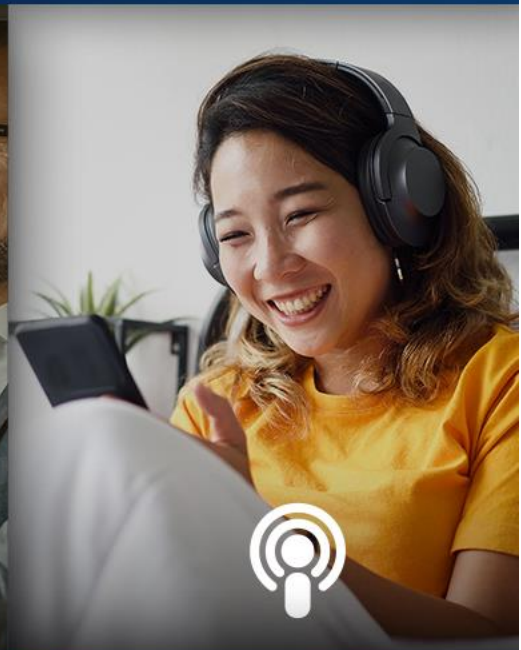
News Talk 4BC 1116 has seen a solid lift and achieved an audience share of 7.6% up 0.9 among all people 10+.



Growth in Perth

6PR 882 Perth – lifts across all timeslots with big increases for Breakfast and Mornings. Overall the station delivered a strong survey 2 audience share of 7.5% up 1.2 points.

📺Nine Audiences continue to turn to trusted voices and platforms where they can voice their own opinions



Digital

 Users
662K

Digital

 Users
1.713M

Digital

 Users
80K

Digital

 Users
161K

Podcast

 Nine Radio Podcasts
+16%

 Downloads to Date
1.45M

Experience the power of news talk



Close to
2 million
weekly listeners*

Almost
2x
more engagement
than FM radio**

85%
of our audiences act
upon advertising***

Data proposition
underpinned by Nine's
12 million
declared sign ups

38%
less likely to change
radio stations
when they hear an
ad on our network****

2GB
873AM

3AW 693
NEWS TALK

4BC 1116
NEWS TALK

6PR 882
NEWS TALK

1395
FIVE aa
TALKING ADELAIDE

2UE 954
SYDNEY

4BH 882
BRISBANE

Magic 1278
MELBOURNE

6GT DAB+
PERTH

Why Radio in uncertain times?

Nearly 1.4 million more Australians in the five capital cities are listening to radio at home

During the Monday-Friday work week, time spent listening in mornings and afternoons (9am-4pm) has **increased by more than 1 hour**

61% of radio listening is in the home while Australians isolate, up from 43% pre-lockdown

Radio is a source of comfort and connectivity

72% agree

"I trust radio to give up-to-date information about COVID-19"

64% agree

"Radio keeps me connected with the local community"

62% agree

"Radio makes me feel less alone"

11% of Australians are listening to more Podcasts during the COVID-19 pandemic

Top 5 Podcast Categories



- | | |
|--------------------------|------------|
| 1. News & Politics | 32% |
| 2. Comedy | 31% |
| 3. TV & Movies | 26% |
| 4. Arts, Culture & Music | 23% |
| 5. Sports | 21% |



THE BEST MUSIC & MORE OF IT

2UE954
SYDNEY

4BH882
BRISBANE

Magic1278
MELBOURNE

6GTDAB+
PERTH

Engage Men 45-55 with Australia's newest easy listening stations

Did you know that Men 45-55 years old are 3.8 times more likely to have a personal income of over \$200K, are highly influential when it comes to household purchases and spend more than one hour a day listening to the radio? Yet despite this, there has been a gap in the market when it comes to giving them a station dedicated to their generation.

One of Australia's favourite radio personalities, Stevie Jacobs, returns to lead Nine Radio's new music stations and to give our audiences the best music and more of it, from the 70's, 80's, 90's and 00's.



Nine