



WHERE AUSTRALIA CONNECTS

Weekly Audience Pack
As at 19 May, 2020

Summary



Linear TV

The Nine Network continues to be the preferred primetime network for all key demographics for the calendar year-to-date, with a 39.7% commercial share among P25-54.

Engagement for the Nine Network is increasing year-on-year across all key demographics. P25-54 are spending an additional +2.78 minutes per day viewing primetime content.

The *LEGO Masters* season final captivated over 1.928million Australians, making it the highest rating episode of the season, up year-on-year for key buying demographics P25-54 and GS+CH, placing it alongside *Married at First Sight* as the most watched entertainment formats in Australia.

BVOD

9Now continues to be the leading CFTA BVOD platform with a year-to-date share of 48% in total minutes.

9Now has experienced year-on-year minutes growth for key demographics include P25-54 (+33%) and P18-39 (+34%).

As viewers continue to turn to entertainment for an escape during the current global pandemic, viewers are choosing family favourite *LEGO Masters*, local drama *Doctor Doctor* and binge-worthy international content (*Escape to the Chateau*, *Reverie* & *Survivor Winners at War*) experiencing week-on-week growth in minutes.

Digital & Publishing

This week the focus is on lifestyle content with social restrictions being lifted Australians are reconnecting with their love of travel content.

Nine's *Traveller* had double-digit week-on-week growth in users (+44%), sessions (+46%) and page views (+43%). Readers are also in travel planning mode, with week-on-week growth in *Traveller's* planning section across users (+80%), sessions (+92%) and page views (+79%).

9Honey Travel also experienced unprecedented week-on-week growth across unique visitors (+152%), visits (+171%) and page views (+70%).

Radio

Audiences continue to turn to Nine Radio for trusted voices and platforms where they can share their 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 digital radio continues to see year-on-year growth, with 4BC in Brisbane delivering +17% in live streaming week-on-week. More listeners are tuning in online each week, with 2GB in Sydney delivering +97% WoW growth for P25-54 and 6PR in Perth delivering +78% WoW growth for P25-54.

Nine Radio has had 1.001 million podcast downloads to date.

CONSUMER PULSE

powered by:



Australians want society to re-emerge the better As at 19th May 2020.

The eighth instalment of Nine’s Consumer Pulse sees consumers looking to the return to normality with a sense of hesitation and uncertainty. This challenging period has set in motion a new direction, with consumers wanting to leave old ways behind and see society re-emerging for the better.

The prospect of restrictions easing is shifting the mood this week. Positive emotions such as hope, calm and optimism are still dominant, but scepticism, hesitation, annoyance and frustration are growing. While for five consecutive weeks there has been a downward trend in those feeling “very/extremely concerned”, this week the trend has flattened.

Despite uncertainties about increased movement and social interaction outside the home, audience activities and spend within the home are following familiar patterns – people continue to experiment with digital services, enjoy quality family time, try new recipes, shop online and tackle DIY projects. Spending continues to increase week-on-week for home office supplies (*Financial Review* readers), health supplements (9Nation audience) and alcohol (*Herald/Age* readers).

Macro Themes

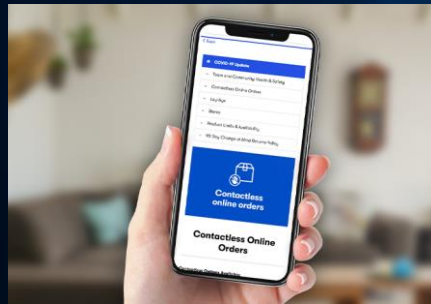


Easy does it

As restrictions begin to ease there is excitement for some, but fear of change for others. The next phase of changes bring uncertainty and ambiguity.

Brand implication

Help support a sense of calm through the transition, change at the right pace, provide a vision of better times ahead.



Transformation

Far from a return to business as usual, life and business are transforming and taking a new direction.

Brand implication

Opportunity to innovate, evolve, reinvent to offer a better customer experience via all brand touch points from service to product.



Improvement

Consumers want to leave the bad behind and keep hold of the good.

Brand implication

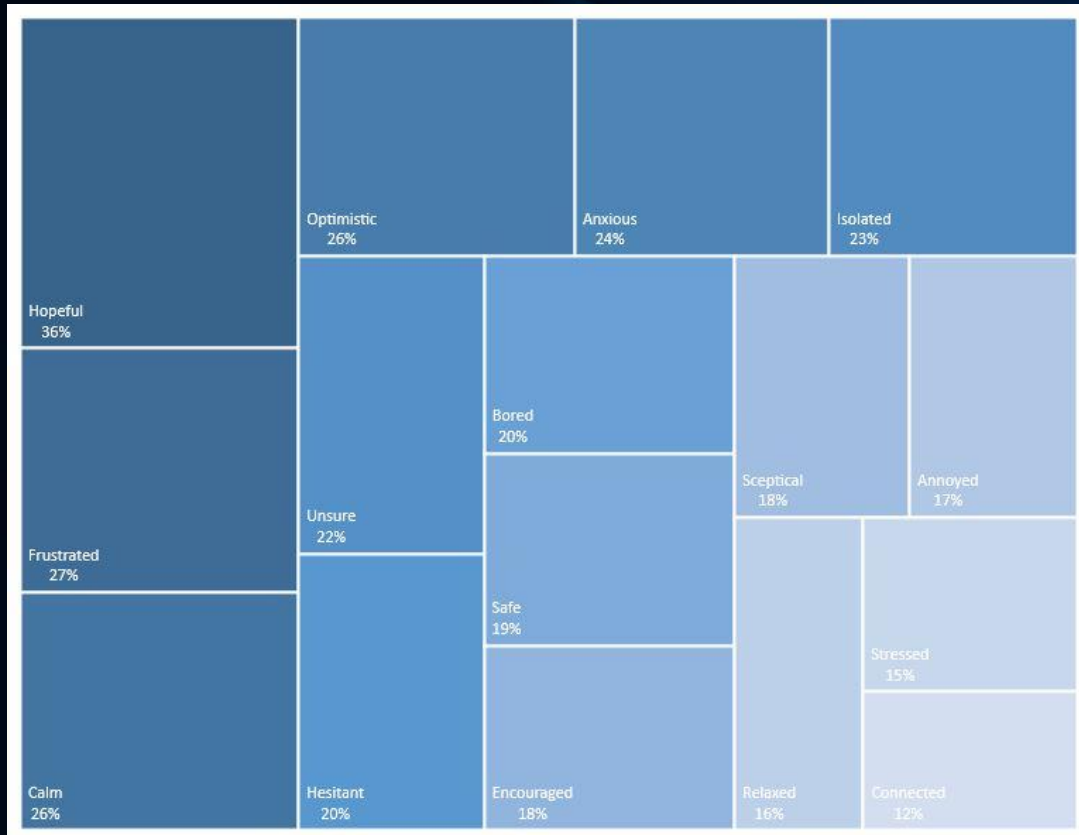
Brands have an opportunity to go on a journey of improvement with consumers, supercharging their corporate social responsibility as a vital component of business strategy.

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

CONSUMER PULSE

As at 19th May 2020.

Mood map



Headline sentiments

"I'm excited at the prospect of social improvement"

"I feel lucky in a personal sense, but worried from a broader community perspective"

"I'm concerned about the unknown future, what a second wave will look like"

"I'm concerned that we'll be pushed out of restrictions before it's safe"

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

CONSUMER PULSE

As at 19th May 2020.

Mood and concern tracker

The prospect of easing restrictions is shifting the mood this week. Positive emotions such as hope, calm and optimism are still dominant, but scepticism, hesitation, annoyance and frustration are growing. While for five consecutive weeks there has been a downward trend in those feeling 'very/extremely concerned', this week the trend has flattened.

Audiences worry about a number of factors, including the prospect of a second wave of infections, inadequate testing to ensure the safety of easing restrictions, the onset of winter and increased illnesses in the community, unease with growing complacency about social distancing, distrust in government, and underlying stress of managing financial, family and work pressures at home.

"Fear of people. I want to see people/friends but find I am hesitant to do so. Been like this for about a week now."

"I'm working more from home and finding it hard to switch off. Also daycare has had to cut hours which is placing stress on my ability to work/get things done."

% Very/Extremely Concerned about the coronavirus (covid-19) situation?



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

CONSUMER PULSE

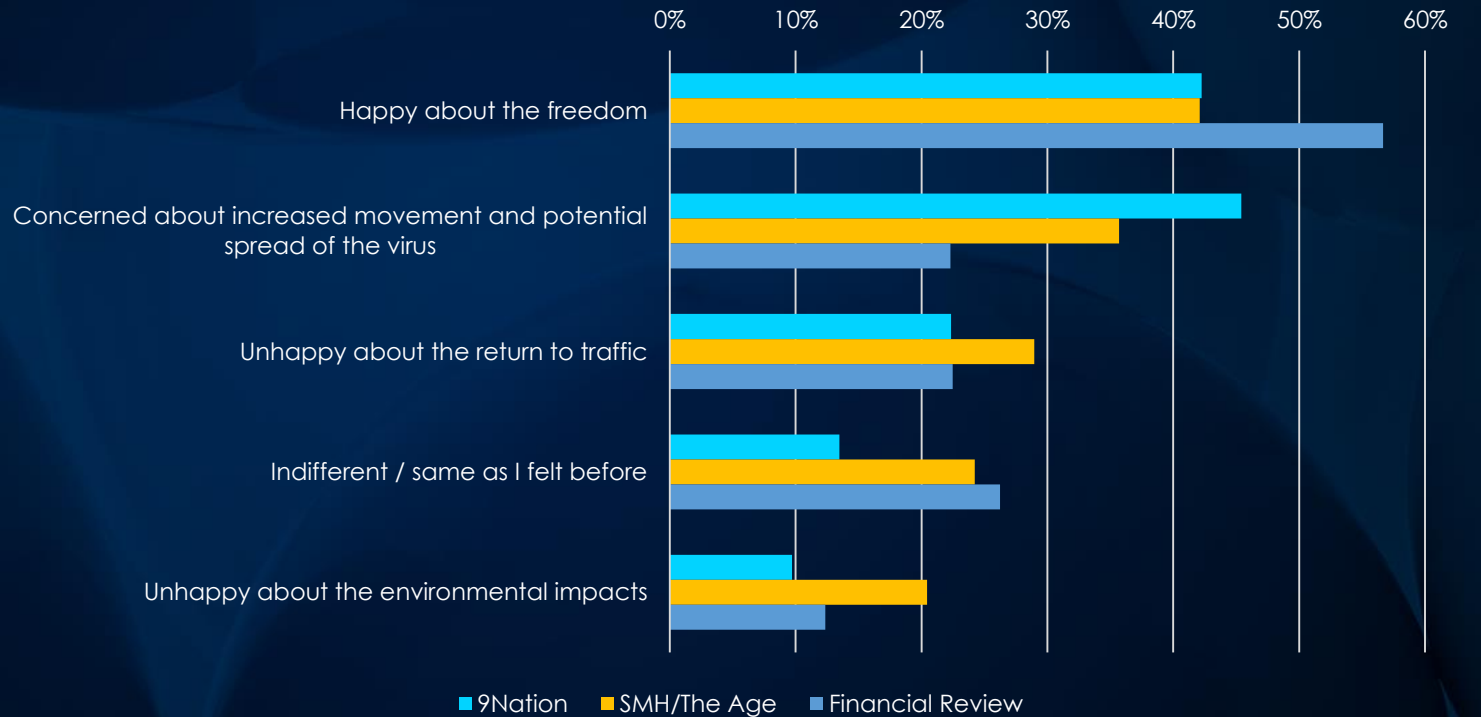
As at 19th May 2020.

The impact of driving

With easing restrictions audiences are beginning to return to the road, with mixed emotions. While many were happy about the freedom (particularly Financial Review readers), there was concern about the implications of increased movement for spread of the virus, the return to traffic and environmental impacts of cars on the road. One in four felt indifferent, or the same way they'd felt before.

"I was never especially worried about car travel as a contributing factor to covid spread, but I worry that car travel will lead to other activities that may contribute to covid spread"

Feeling about restrictions lifting



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

CONSUMER PULSE

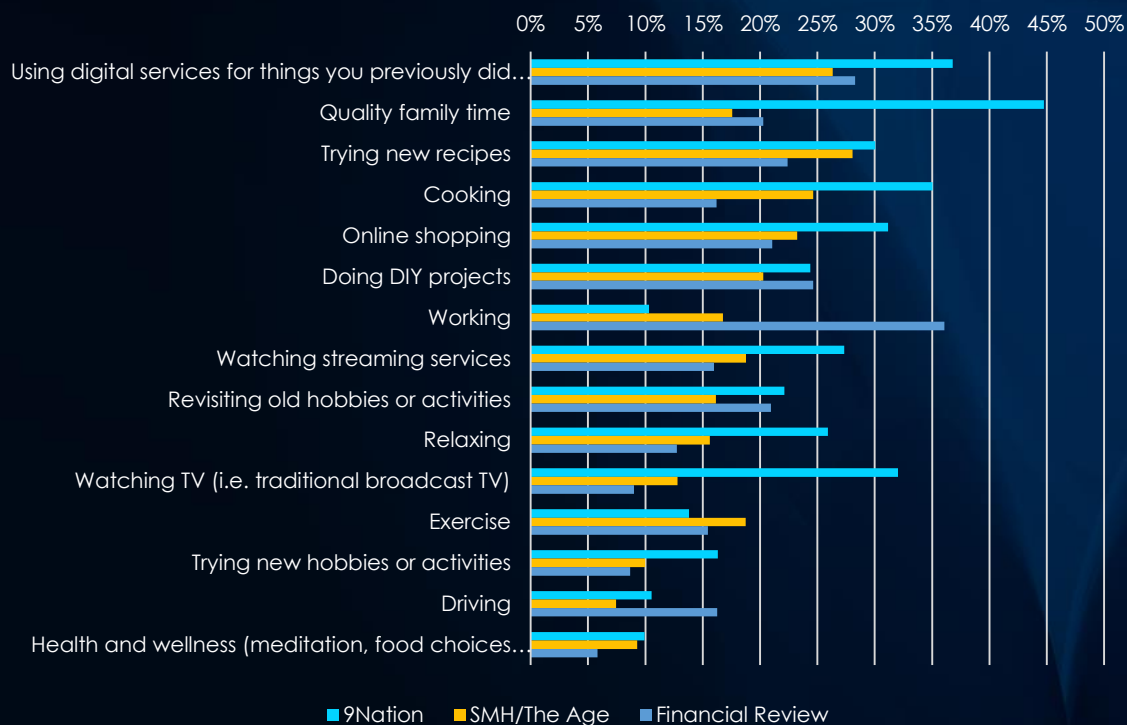
As at 19th May 2020.

Activities and consumer spending

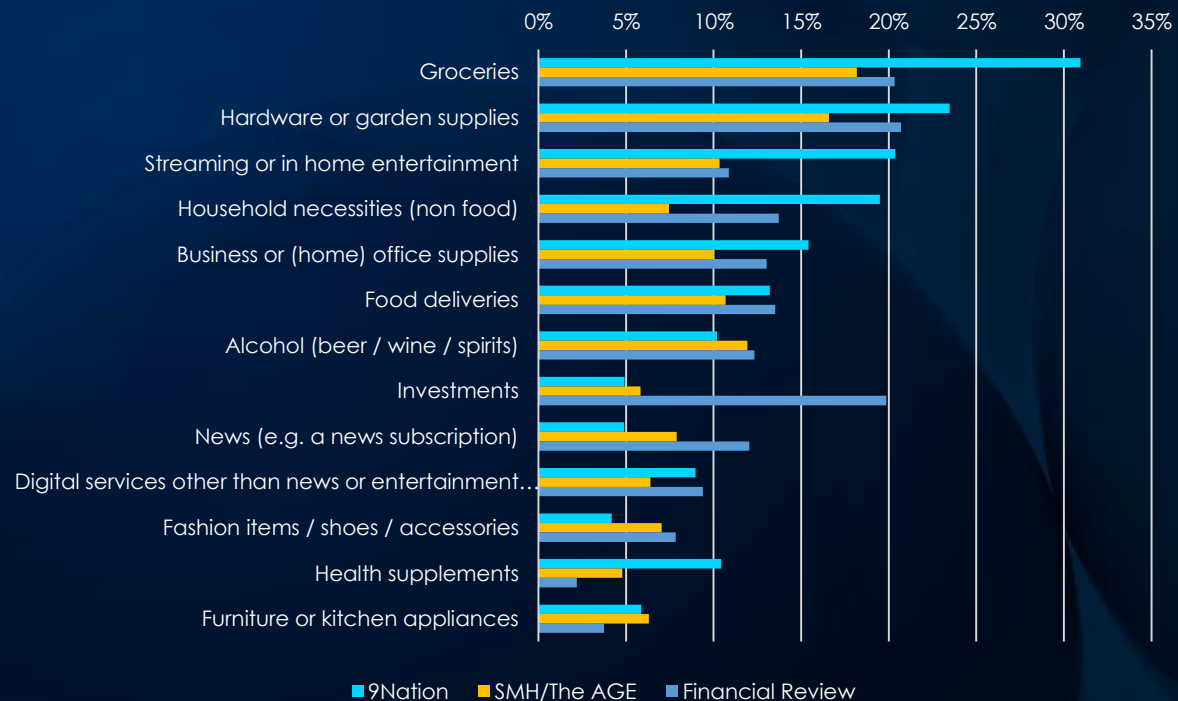
Despite uncertainties about increased movement and social interactions outside the home, audience activities and spend within the home are following familiar patterns – they continue to experiment with digital services, enjoy quality family time, try new recipes, shop online and tackle DIY projects. Accordingly, spend has held or increased week-on-week on groceries and household necessities, streaming, news and other digital services, hardware and garden supplies, alcohol and health supplements.

Compared to other groups, 9Nation audiences continue to increase their use of streaming services and television, *Herald* and *The Age* readers are exercising more, *Financial Review* readers are working and driving more.

% who are doing activities 'more than since week'






% who spent more per category compared to last week



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

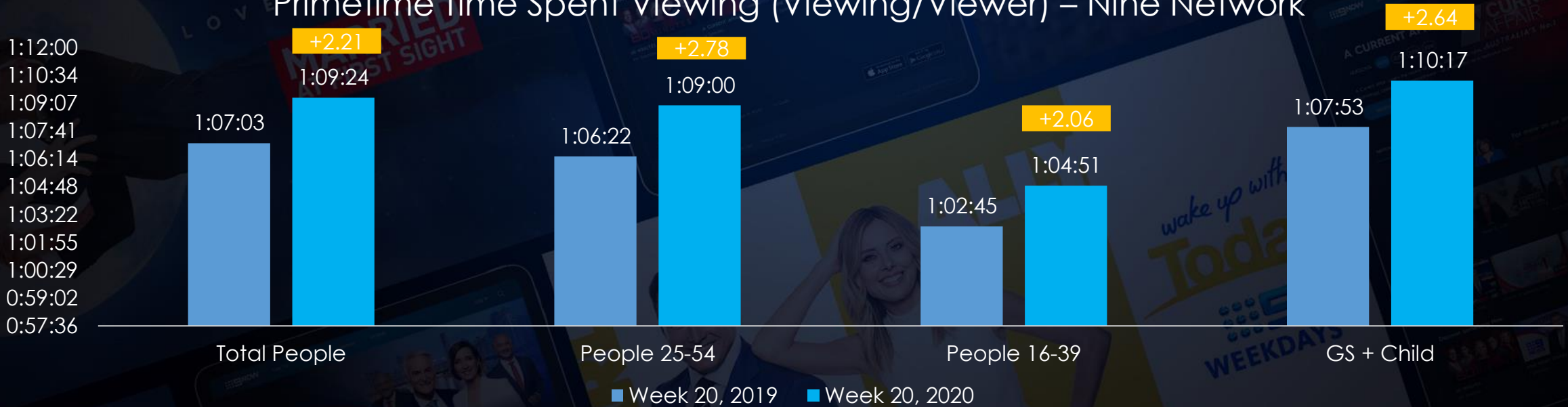
Nine is Australia's preferred network for all key demos

2020 CALENDAR YEAR TO DATE PRIME TIME COMMERCIAL SHARE	 NETWORK	 NETWORK	 NETWORK
P25-54	39.7%	31.2%	29.1%
P16-39	39.5%	30.5%	30.0%
GS+CH	40.8%	31.7%	27.5%

Engagement on linear TV is increasing across all key demos

Primetime time spent viewing is up YoY for the Nine Network across the 5 city metro for all key demos (Week 20, 2020 v Week 20, 2019)

Primetime Time Spent Viewing (Viewing/Viewer) – Nine Network



1.928 Million Australians captivated by LEGO Masters season final



HIGHEST RATING EPISODE OF SERIES
1.928 MILLION AVERAGE VIEWERS
 1.462M METRO | 466K REGIONAL

NO.1 PROGRAM
 IN METRO MARKETS

FAMILY FAVOURITE
 CO-VIEWING UP YOY
 2019: 68.2% VS 2020: 69.9%

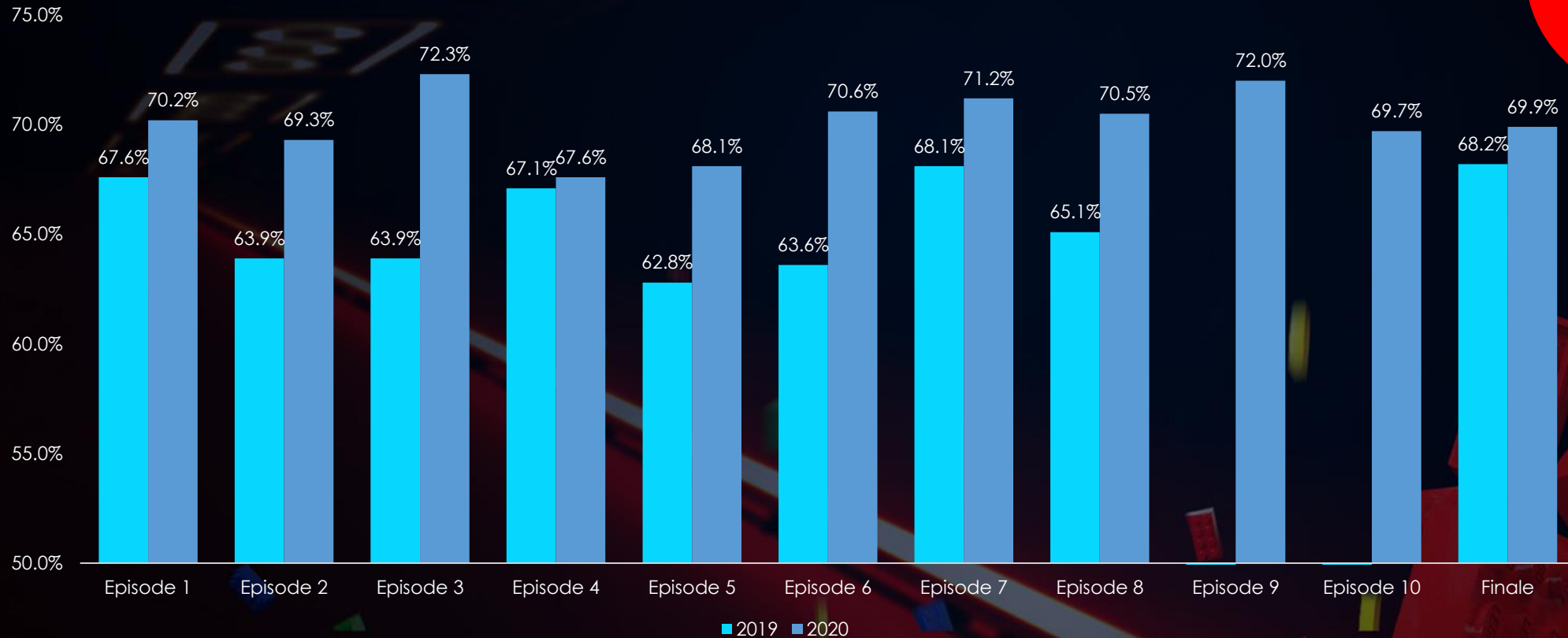
YEAR ON YEAR GROWTH
 25-54 +2.65%
 GS+CH +2.99%

Dynamic timeslot share <small>18 May 2020, 5 City Metro</small>	LEGO Masters		
P25-54	49.0%	16.3%	34.7%
P16-39	49.3%	11.7%	39.0%
GS+CH	50.8%	18.7%	30.5%

LEGO Masters connects with more families

Every episode of LEGO Masters season 2 has delivered year-on-year growth in co-viewing profile.

No. 1
co-viewed
series for
2020



Source: OzTAM Metro Total TV, Nine, Lego Masters 2019 v Lego Masters 2020, Audience Co-Viewing %, LIVE. Number one: OzTAM Metro Total TV, Nine, Lego Masters 2019 v Lego Masters 2020, Episodes 1-11, Audience Co-Viewing %, LIVE.

Trusted news content continues to be In-demand more than ever before



METRO GROWTH YOY

↑ P25-54: **+19.11%**
P16-39: **+23.27%**
GS + CH: **+12.76%**

METRO GROWTH YOY

↑ P25-54: **+25.28%**
P16-39: **+55.71%**
GS + CH: **+9.10%**

METRO GROWTH YOY

↑ P25-54: **+11.55%**
P16-39: **+16.25%**
GS + CH: **+18.48%**

METRO GROWTH AMONG YOUNGER VIEWERS

↑ 16-39: **+3.17%**

WEEKLY METRO GROWTH YOY

↑ P25-54: **+10.90%**
GS + CH: **+17.09%**

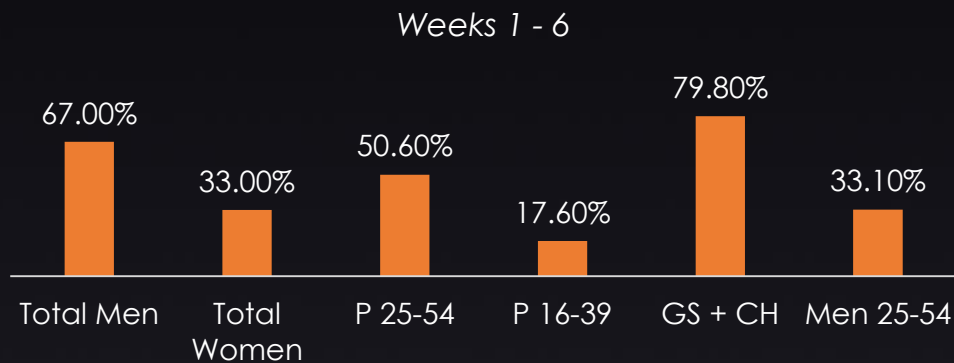


Australia's new male reality obsession drives audience growth

3.82 MILLION TUNE IN TO 9RUSH ACROSS FIRST SIX WEEKS

- P25-54: **23.18%** reach
- P16-39: **14.61%** reach
- Total Men: **22.27%** reach
- M25-54: **23.34%** reach
- M16-39: **13.18%** reach

FULL DAY AUDIENCE PROFILE



FULL DAY AVG. AUDIENCE GROWTH - WEEK 6 vs LAUNCH WEEK

- P25-54: **+33.50%**
- P16-39 **+42.80%**
- M25-54: **36.10%**

TOP PROGRAMS WEEK 6

Street Outlaws– EV

- Avg. audience: **55,643**
- P25-54: **54.1%**
- Men: **57.4%**
- Women: **42.6%**

Street Outlaws: Memphis -EV

- Avg. audience: **47,384**
- P25-54: **60.2%**
- Men: **54.8%**
- Women: **45.2%**

Alaskan Bush People

- Avg. audience: **49,985**
- P25-54: **52.0%**
- Men: **54.1%**
- Women: **45.9%**



The Voice returns like you've never seen it on Sunday May 24



**47%
OF AUSSIES
REACHED
IN 2019**

**NO.1 ENTERTAINMENT
SHOW EVERY NIGHT
ON-AIR IN 2019**

**AUDIENCE
GROWTH YOY**
P25-54: +5.4%
P16-39: +1.4%
GS+CH: +4.4%

**NO.1 IN ITS TIMESLOT
EVERY NIGHT ON-AIR**
IN 2019 FOR
P25-54, GS+CH

**COMM SHARE
GROWTH YOY**
P25-54: +4.2 pts
P16-39: +5.9 pts
GS+CH: +5.7 pts



**+67.7%
STREAMS YOY
IN 2019**

**Over
1.8 Million
viewers per
episode in
2019**

Watch a sneak peek here



**OVERNIGHT
1.32M**

**TIMESHIFT
91K**

**ENCORE
243K**

**LIVE
VPM
16K**

**VOD
VPM
92K**

☐☐☐Nine

A new world of entertainment starts May 24



STILL TO COME IN 2020

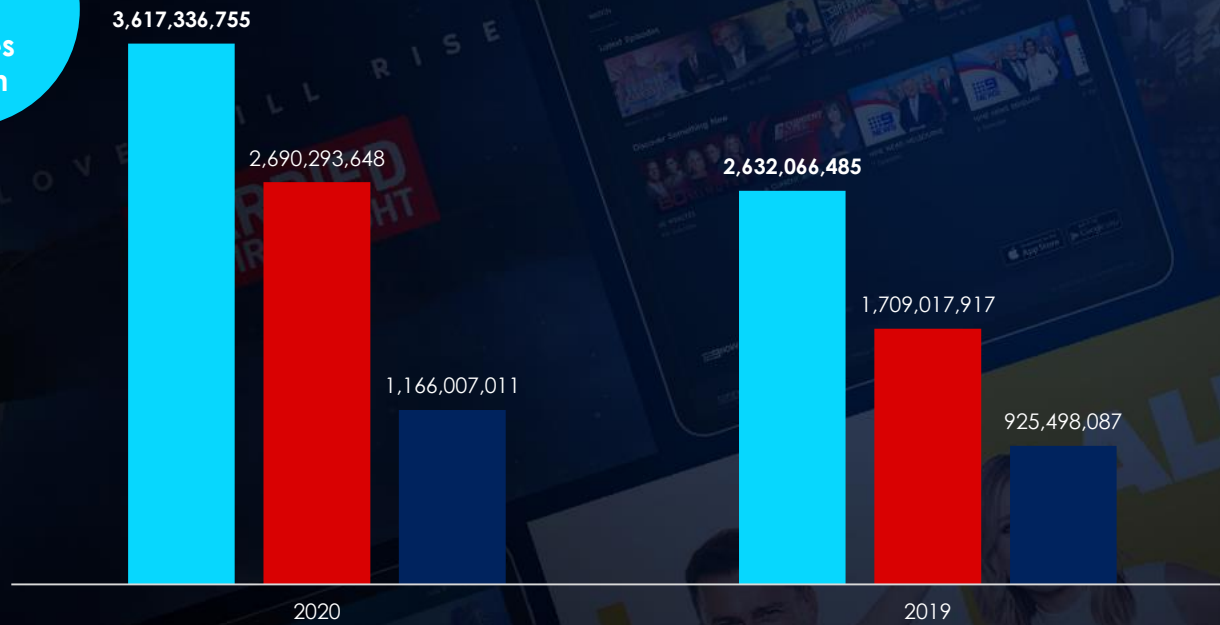
	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
18.00							
18.15							
18.30							
18.45							
19.00							
19.15							
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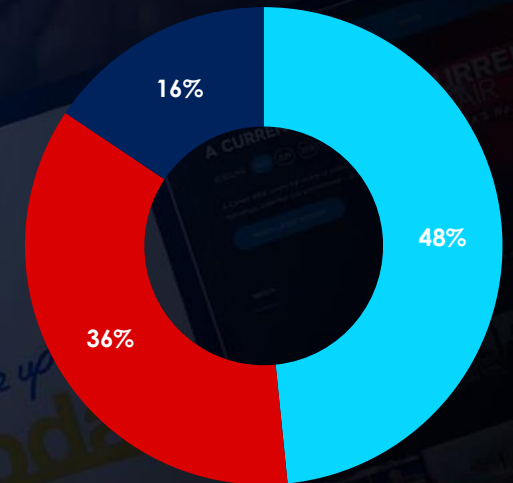
The leading commercial free to air BVOD platform with Year-on-year growth in content consumption

+37%
year on
year
minutes
growth

Growth of Minutes



CFTA share of Minutes YTD



9NOW — 7plus — 9play

Year-on-year growth in minutes for key demographics

+25%
year on
year
minutes
growth

People 18-39

1,700,074,432



2020

1,362,364,001



2019

People 25-54

2,386,145,878



2020

+34%
year on
year
minutes
growth

1,781,675,725

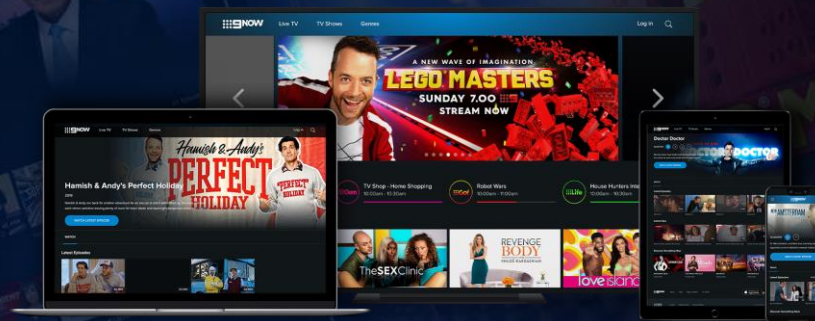


2019

The go-to destination for premium local content and binge-worthy international drama and entertainment

Australians are choosing 9Now to relax, escape from reality and be entertained.

From keeping up-to-date with locally produced premium content *LEGO Masters* and *Doctor Doctor*, to discovering binge-worthy international drama and entertainment such as *Emergence*, *Escape to the Chateau*, *Reverie* and *Survivor Winners at War*, 9Now is the complete streaming experience.



9Now Australia's leading CFTA platform YTD.

Top content last week

Series Name	Minutes
Lego Masters Season 2	1,553,973
Doctor Doctor Season 4	5,319,767
Survivor Winners at War	4,120,807
New Amsterdam Season 2	3,354,828
Emergence Season 1	2,103,561
Manifest Season 2	1,956,419
Love Island UK Season 6	1,751,553
Lego Masters Season 1	1,651,629
Manifest Season 1	1,541,017
Chicago Med Season 4	1,511,156

Binge-worthy content WoW growth

Series Name	Minutes Growth WoW
Escape to the Chateau Season 6	86%
Emergence Season 1	70%
Survivor Winners at War	68%
Mysteries of the Missing Season 1	55%
Reverie Season 1	30%
Killer Couples Season 8	22%
Very Cavallari Season 1	22%
Flip it Like Disick Season 1	18%
Hamish & Andy's Perfect Holiday	16%
Royal Pains Season 3	14%

Australians turn to trusted news

Metro Mastheads' unique audience



The Sydney Morning Herald

+65.7% MoM
(UA – 11.193M)

+35.5% YoY
(UA – 11.193M)

THE AGE

+51.1% MoM
(UA – 5.414M)

+38% YoY
(UA – 5.414M)

FINANCIAL REVIEW

+107.5% MoM
(UA – 3.542M)

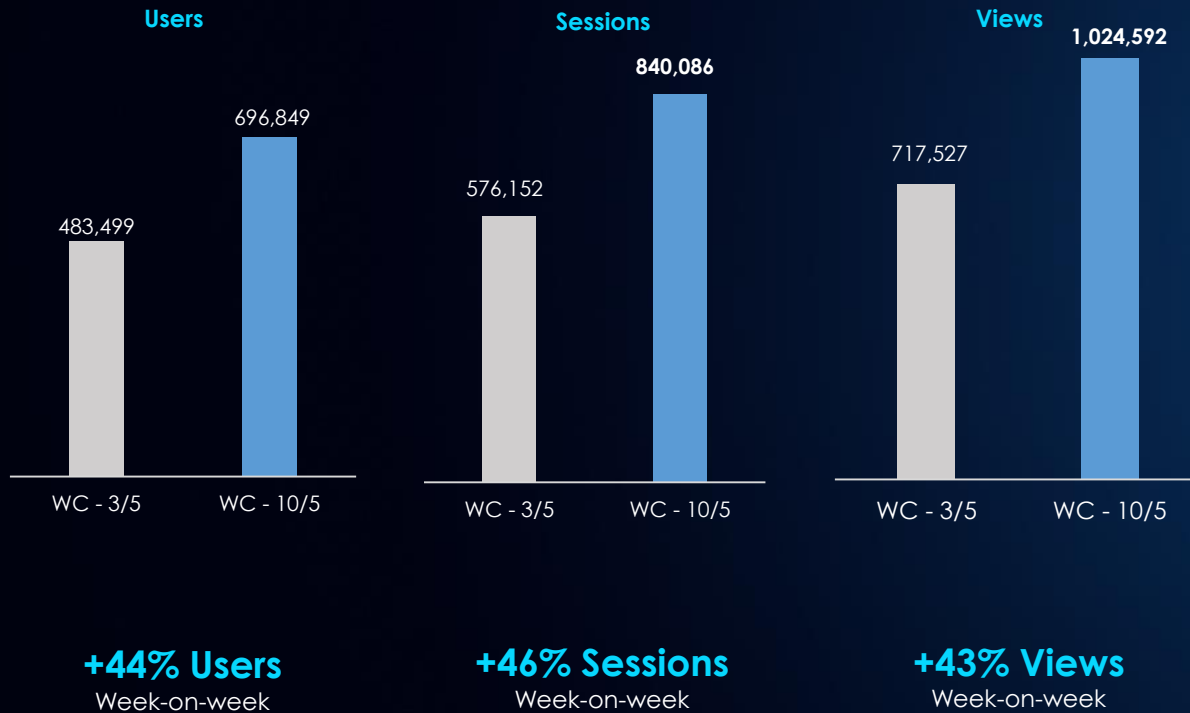
+88.8% YoY
(UA – 3.542M)

The Sydney Morning Herald — ● THE AGE — ● FINANCIAL REVIEW — ●

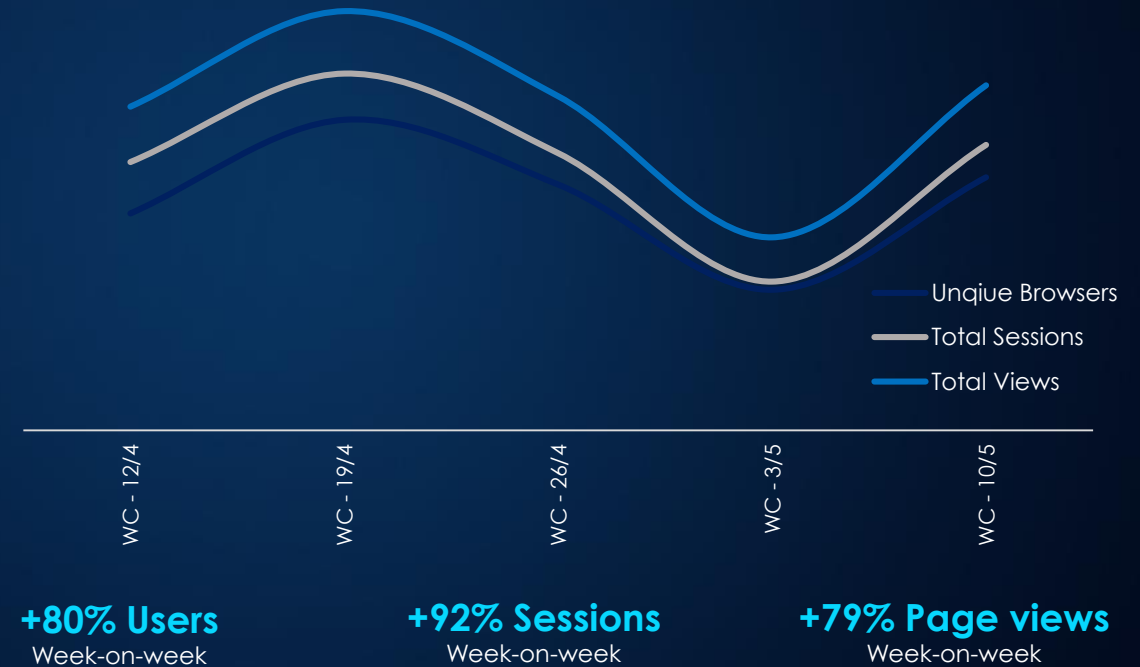
Traveller continues to inspire Australia's love of travel

As social restrictions are being lifted Australians are reconnecting with their love of travel. Nine's *Traveller* has had week-on-week growth in users (+44%), sessions (+46%) and page views (+43%). Readers are also in travel planning mode, with week-on-week growth in *Traveller's* planning section across users (+80%), sessions (+92%) and page views (+79%).

TRAVELLER



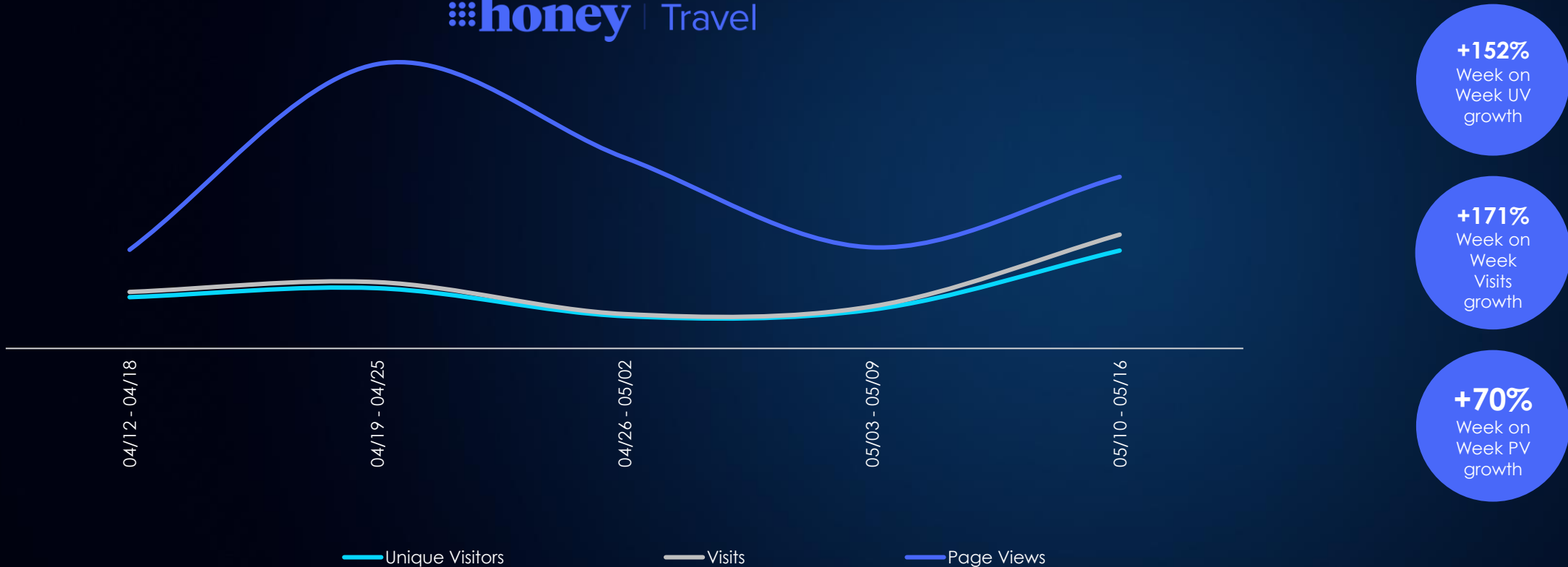
TRAVELLER Planning section



Australians are planning their next adventure with 9Honey Travel

Travel content is also in-demand across 9Honey with 9Honey Travel experiencing unprecedented week-on-week growth across unique visitors (+152%), visits (+171%) and page views (+70%).

honey | Travel



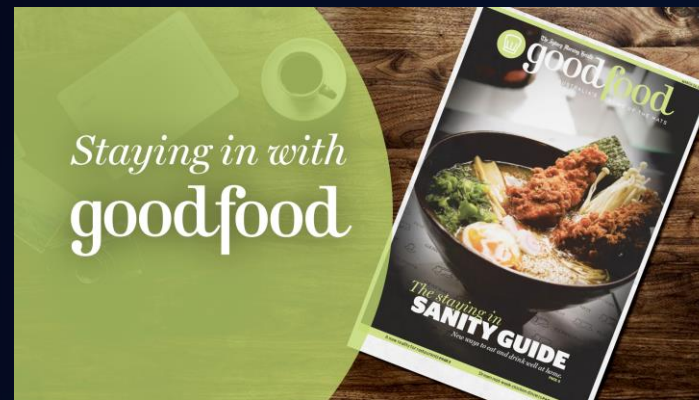
+152%
Week on Week UV growth

+171%
Week on Week Visits growth

+70%
Week on Week PV growth

The best lifestyle content is still to come

The best lifestyle content is still to come, and your brand can engage readers through stories which inspire, inform and educate.



BIG IDEAS

FOR NEW WORLD LIVING

Nine's new world living content partnerships allow brands to engage with consumers while at home.



Health Today

Health Today is an essential guide to help consumers navigate through their wellbeing concerns, whether it's physical health, mental health, nutrition or financial. Coming to life across Nine's TV, publishing, radio and digital assets, Health Today will bring together experts and unite household brands like *Sunday Life*, *TODAY*, *9Honey* and *Good Food* to start a home health revolution right across Australia.



Getting Together Today

As the pandemic continues to change the way we live, the way we connect with our friends, families, colleagues and community changes with it. But just because we can't physically be together doesn't mean we can't get together and stay connected with the help of technology. Join Nine as we engage the depth and breadth of the Nine ecosystem with **Getting Together Today**, exploring the latest in technology, the meaning of connection, and the state of the nation in a world of isolation.



The New Active

For many Australians exercise plays a crucial role in their everyday lifestyle, and the struggle to maintain it at present is real. The question on everybody's lips is how can I maintain my physical and mental health indoors? What defines **The New Active**? From TV, publishing and radio to digital, we set out to motivate and guide Australians with the best in health and wellbeing.



Brighten Up

Brighten Up the lives of Australians and join the at-home beauty revolution. Inspire and inform consumers with at-home, self-care beauty solutions from Australia's best beauty influencers, and harness the power of immerse ad creative and high impact publishing stunts – all while aligning with the best lifestyle brands Australians know and love.

More Australians turn to Nine Radio

The number one network amongst 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.

Audiences continue to turn to trusted voices and platforms where they can share their own opinions



Digital



Live Streaming
+11% WoW



Users
+48% WoW
PPL 25-54 +97% WoW

Digital



Live Streaming
+12% WoW



Users
+15% WoW
PPL 25-54 +18% WoW

Digital



Live Streaming
+17% WoW



Users
+11% WoW
PPL 25-54 +10% WoW

Digital



Live Streaming
+3% WoW



Users
+76% WoW
PPL 25-54 +78% WoW

Podcast



Downloads to date
1.001M

Experience the power of news talk



Close to
2 Million
weekly listeners*

85%
of our audiences act
upon advertising***

Almost
2x
more engagement
than FM radio**

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

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"



Nine Radio podcasts engaging audiences anywhere, anytime



Ben Fordham
+33% increase



Ross & John
+52% increase



Alan Jones
+91% increase



Brooke Corte
+11% increase

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% |

☐☐☐Nine



Ben Fordham Live
Sydney's Best Breakfast
Starts June 1

2GB
873AM

The power of **breakfast on 2GB**



226th

Consecutive Survey win



**No. 1
P10+**

Average Audience



**No. 1
P10+**

Time Spent Listening



**No. 1
P40+**

Cume, Average Audience, TSL and Share

1 Commercial Share



476K
CUME



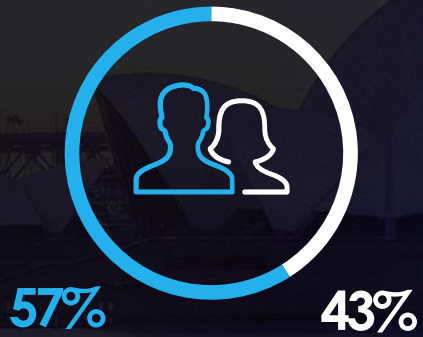
166K
AVE AUD



6:05
TSL

Who is the Ben Fordham listener?

Gender



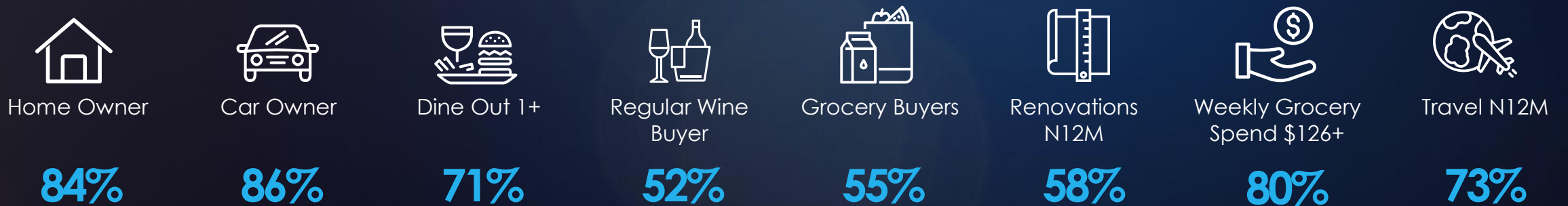
HH Income



Audience Demo %



Audience Profile



☐☐☐Nine



Breakfast with
Neil Breen
Starts June 1

4BC1116
NEWS TALK

The power of breakfast on 4BC

Mon-Fri 4.30am-8.00am

1 Commercial Share



99K
CUME



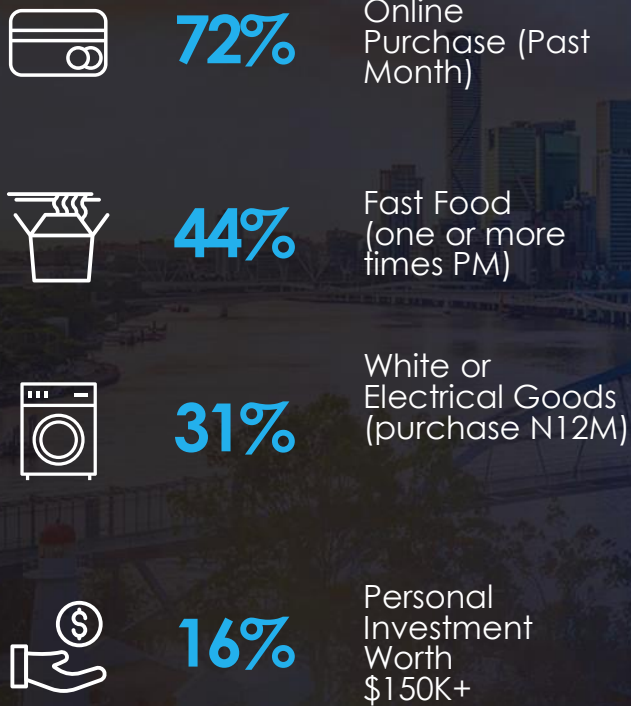
31K
AVE AUD



5:34
TSL

Who is the 4BC breakfast listener?

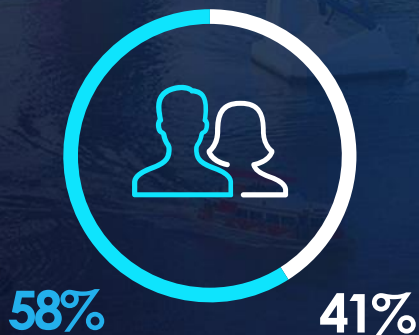
Buyer Graphics



HH Income



Gender



Occupation



More than one in two (65%)
Are heavy radio listeners
20+ hours each week



THE BEST MUSIC & MORE OF IT

2UE954
SYDNEY

4BH882
BRISBANE

Magic1278
MELBOURNE

6GTDAB+
PERTH

Reaches 156,000 listeners weekly

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.

THE POWER OF MEN 45-55

HIGH INCOME EARNERS &
HIGH RADIO LISTENERS



3.8X

Personal income
+\$200K



54%

Listen to radio
for 1+ hours a
day

INFLUENCE A RANGE OF
MAJOR HOUSEHOLD PURCHASES



93%

Primary Decision
Makers



1.5X

More likely to influence
the purchase of cars,
boats, electronics
& home improvements

SPEND A LOT OF
TIME IN THE CAR



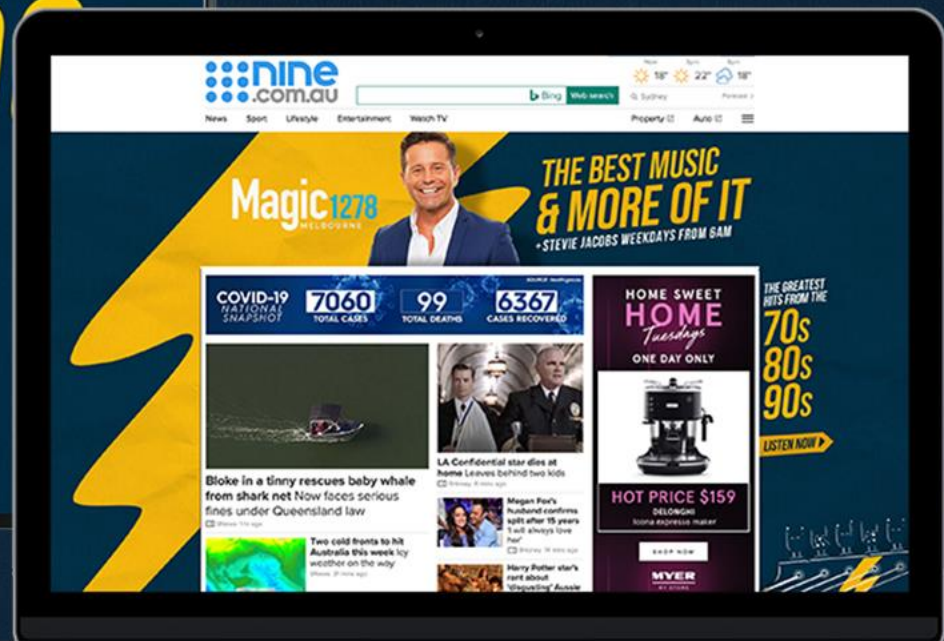
73%

Use their car to
commute to work



HEAVY

Weekend car
users across all
day-parts



 **Nine**

