



A new normal of viewing behaviours

In the ever-changing TV landscape, the long-term trend towards broadcast video on demand (BVOD) was already gaining traction well before COVID, and this looks set to continue.

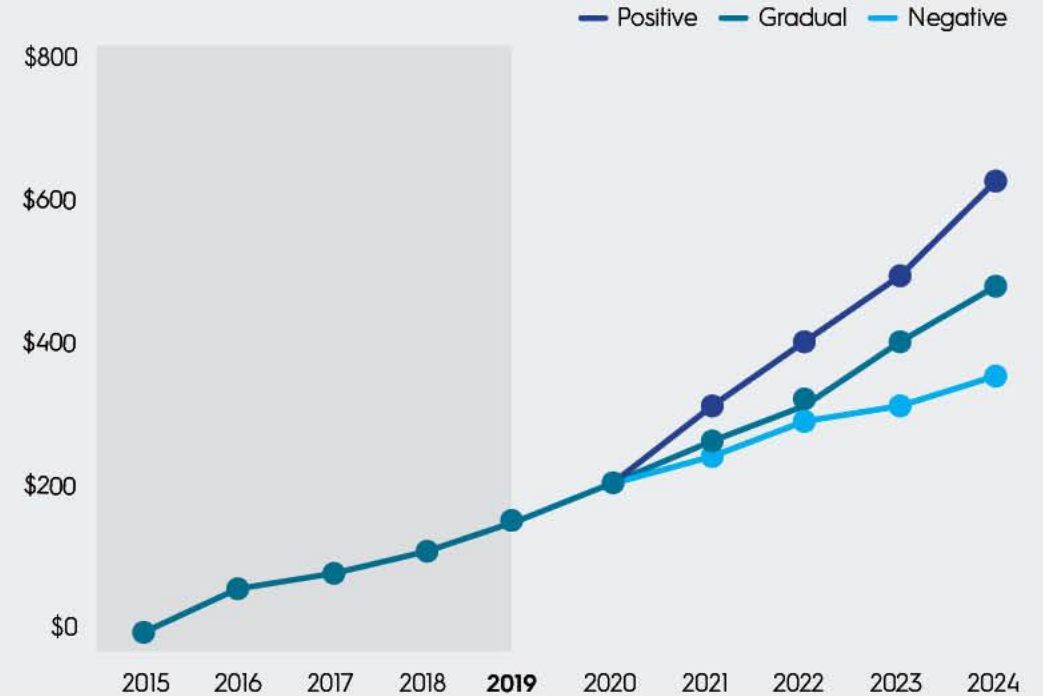
BVOD is the content and programming made available to stream on-demand by TV broadcasters. To be clear though, what we at Nine classify as VOD content – forget short-form – it is all about premium long-form video. Why? It's the main reason viewers come to the platform to watch (live or on-demand), binge on shows and discover new content.

The global pandemic has brought forward permanent shifts in viewing behaviours amongst Australians and unlocked new growth areas for streaming video.

With us spending so much time in our homes since COVID struck back in March (and even more time depending on the State lockdown status), we have seen viewing increase by 30.9 per cent across commercial FTA VOD platforms.

We know that TV + BVOD complement each other, with the combination providing incremental reach for advertisers.

Broadcast Video on Demand (BVOD) market (A\$ Millions)



CAGR 2019-2024 based on gradual recovery trajectory: **+24.87%**



Source: OzTAM VOD + Live VOD 1 Jan - 26 Nov 2020. Metric: minutes. Excludes viewing on connected TVs. Long form defined as duration more than 15min (PPL) and short form defined as less than 15min (PPL). View TV in 2020 vs 2019. OzTAM + LIVE, RMC, Entertainment & Media Outlook 2020-2024.

9Now – a streaming success

9Now has led the BVOD market in 2020 in the demographics that matter.

However, this is not new, as 9Now has dominated minute share year after year compared to the other commercial FTA BVOD services.

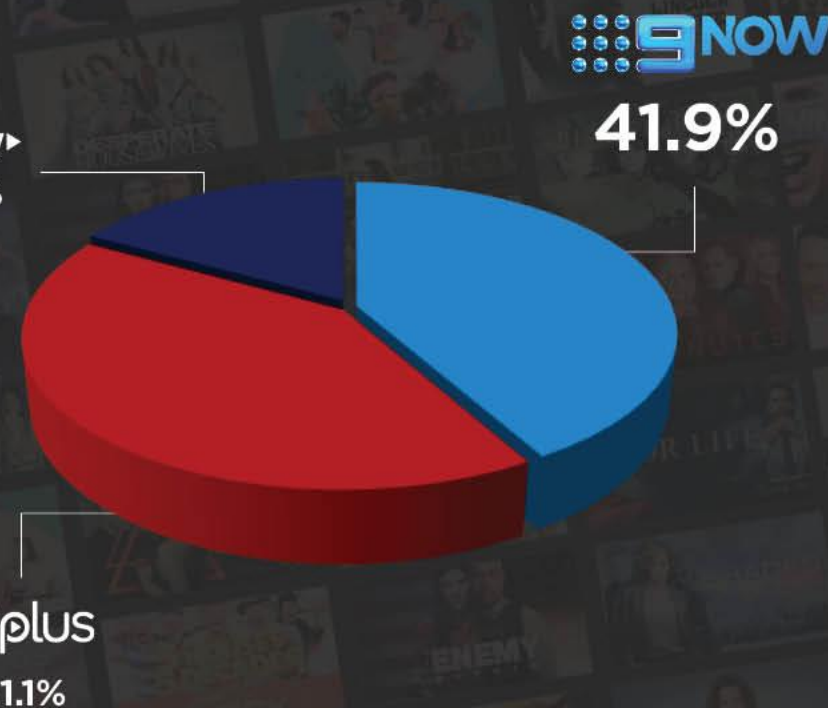
9Now is Australia's leading broadcast video on demand platform, offering a complete streaming destination for consumers around the nation to catch up on their favourite programs anywhere, anytime, on the device of their choosing.

9Now provides marketers with the best of television and the best of digital by targeting declared users at extraordinary scale.



Minute Share 2020

10 play
17.0%



VOD is a place to escape & indulge

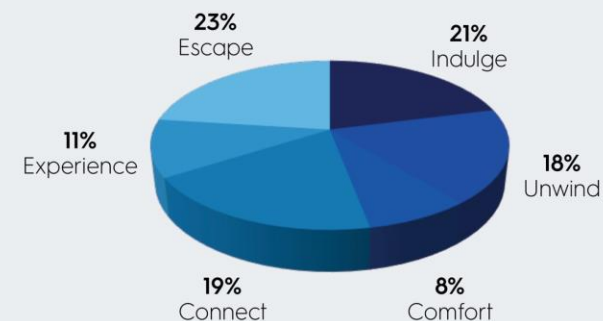
In 2020, TV and VOD have increasingly been a source of important news and information, as well as an escape in the form of popular drama and reality programs.

With VOD now playing a significant role in the viewing landscape, by allowing us to immerse ourselves in the content, it excels at fulfilling a couple of key viewing needs: Escape – the need to leave the “everyday” behind, and Indulge – in the personal favourites satisfying one’s guilty pleasures.

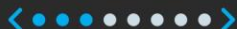
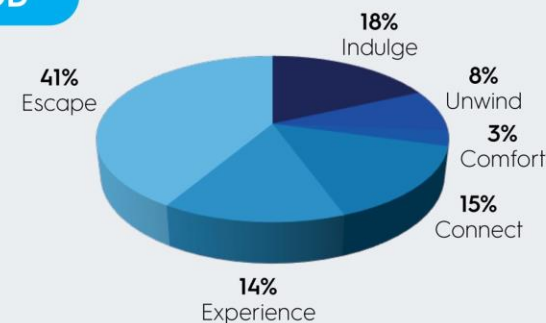
It’s probably no surprise that on 9Now reality and drama content reigns supreme, with viewers drawn to the platform to watch the big, buzzy, tentpole programs, and discovering and bingeing on others.

Married at First Sight season 8 was the number one VOD program of 2020, and the top binged series year to date include Desperate Housewives, 24, Love Island UK, Love Island USA, and The Arrangement.

Live TV



VOD



9Now is an entertainment destination in its own right

9Now has evolved from a catch-up streaming service to an established entertainment destination in its own right, with thousands of titles and just as much content as SVOD providers.

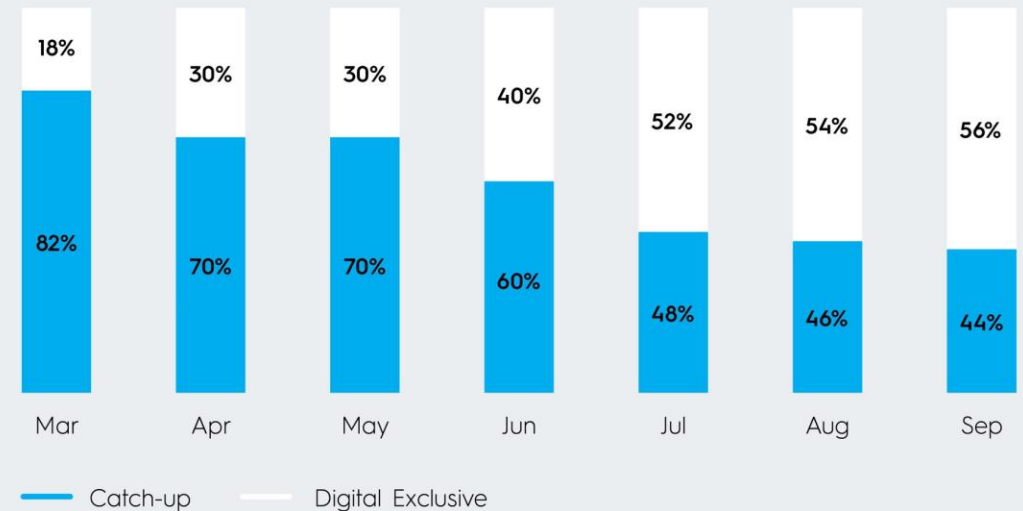
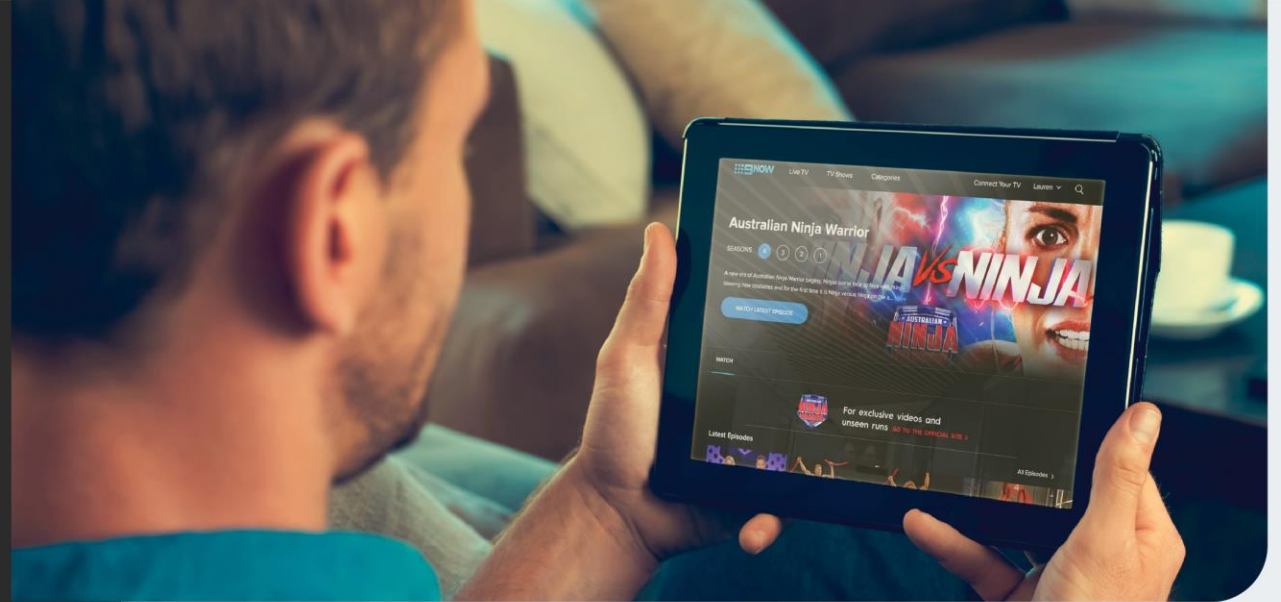
With a combination of local and international exclusives alongside library content offering the chance to binge on complete seasons of programs, it really does deliver a complete streaming experience, with a more consistent audience base.

In addition, we are using BVOD for information, not just entertainment. That's because BVOD also provides a sense of

"plugging in" and a feeling of connection to society, with a unique and growing strength in LIVE viewing including sport, news and timely current affairs content.

In fact, this year's State of Origin Game III delivered a record BVOD audience for a live event, with an all-time high total of 199,000. And LIVE stream viewing for news bulletins on 9Now has grown by 149% per cent YoY during the COVID lockdown.

When the appeal of big news events is added to the power of sport, LIVE viewing numbers by BVOD will continue to expand in 2021 and beyond.



Our entertainment slate in 2021 will be even bigger

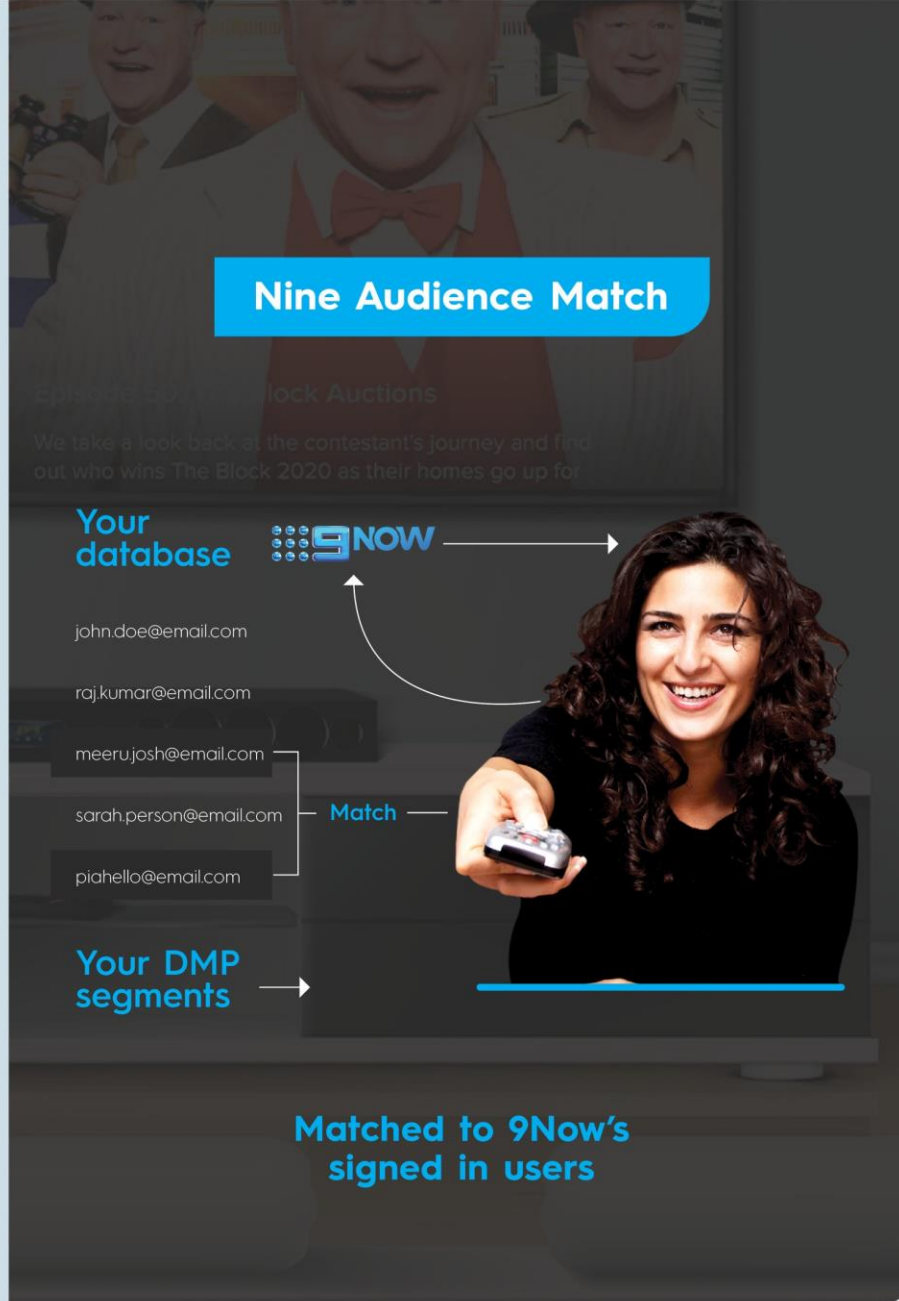
With an unrivalled programming slate scheduled for the rest of the year and into 2021 across Sport, News, Entertainment and Lifestyle, Nine has never been better positioned to help your brand grow.

In 2021, big cross-platform audiences will be delivered via ratings hits like the Australian Open (with all matches streamed live on 9Now), Married at First Sight Season 9 (Season 8 was the biggest BVOD series of the year), Love Island Australia Season 3 and Doctor Doctor Season 5. They'll be joined by first seasons of Beauty and the Geek, Amazing Grace and Parent Jury, along with The Celebrity Apprentice and the ever-consistent blockbuster, The Block.

In 2021, the exclusive content lineup for 9Now will also include Love Island UK Season 7, For Life Season 2 and Almost Family, alongside the hit shows Law & Order, Chicago Med, House and SMASH, to name a few. Add to this complete seasons of Keeping up with the Kardashians, The Real Housewives of Beverly Hills and Vanderpump Rules, and there is simply nowhere else you can get such depth and volume of premium content across all screens, reaching audiences at scale in the demographics you need.



Create personalised experiences on the big screen at home



The businesses that will lead in the years to come are those who can navigate new and existing platforms by bringing together data sets across multiple platforms to form an in-depth view of their customers.

We are now at a point where the power of television and the precision of digital can work together to create new ways for brands to connect and engage with audiences at scale.

Nine's new Audience Match product powered by Adobe enables you to match your customer data to our 13 million signed-in users, in a premium alternative to the walled gardens, at scale and across broadcast video on demand.

Just as you can target your own customers across Google properties through Customer Match and across Facebook through Facebook Custom Audiences, Nine's Audience Match will work in exactly the same way, but with 30-second non-skippable ads within broadcast-quality content.

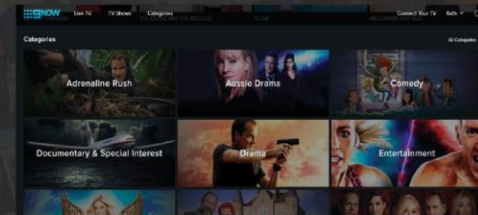
We know who every viewer is, so you can communicate with your known customers, not anonymous devices. Audience Match will help you to seamlessly bring together the power of premium content and people-based data, creating personalised customer experiences in living rooms around Australia

Creative ad solutions to partner with the hottest free-content slate

How, where and when we watch our favourite TV content continues to evolve as technology enhances our viewing experience.

And when it comes to the advertising experience it's a trade-off. The high view-through rate on BVOD reflects the value exchange with viewers: they are happy to watch the ads as they get great free content in return.

9Now provides a suite of advanced advertising solutions spanning interactivity, personalisation, audience, genre and interest group targeting.



I'm in the mood for..

Category Sponsorship

Great for:
Brand Awareness



Premium Slate Ad

Short Intro Ad

Great for:
Brand Affinity



(Sponsored) Content Rail

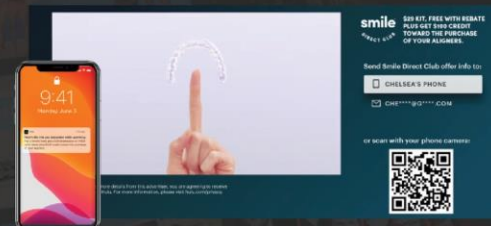
Curated Content Experience

Great for: Aligning
Brand Personality



Pause "Intermission" Ad

Coming in H1 2021



Shoppable Engagement Ad

Coming in H1 2021

9Now is well placed to win in the battle for attention

The battle for attention in the living room has never been as fierce. Even though we can watch TV anywhere and anytime, the preferred device is still the big screen at home.

And this holds true when it comes to the way we watch BVOD, where the big screen eclipses mobile, tablet, laptop and desktop viewing.

Australians have adapted to the new norms of life, combined with an explosion of choice. 9Now is no longer a catch-up service, it's fully fledged streaming that allows you to unlock a world of free entertainment, stream exclusive new shows, complete seasons of all

your favourites, and watch every one of Nine's TV channels live.

We expect the long-term viewing trends and behaviour for BVOD to accelerate as more viewers tune into quality, broadcaster-driven content on the device of their choosing. 9Now continues to set new viewing benchmarks, with increasingly personalised experiences through Adobe Match and creative ad solutions to enhance the viewing experience.

9Now will continue to be the most effective, accountable and measurable BVOD platform to deliver you real business outcomes.



Source: OzTAM Live + VOD VPM, Metric: Minutes, 1 Jan - 28 Nov 2020, 9Now. Includes viewing on connected devices - TV (65%), Desktop (14%), Phone (13%), Tablet (7%).

MARRIED AT FIRST SIGHT

Reality

Australia's most controversial social experiment returns. After being matched by three relationship experts, strangers looking for love meet their partners for the first time at the altar in the quest to find true happiness.

▶ WATCH LATEST

Season 8 Clips

2 Clips

Season 7

Season 6

Season 5

Season 4



Season 8
The MAFS experiment is back in 2021.



Married At First Sight
Married At First Sight returns
1 MIN





Your World of Free Entertainment



YOUR PARTNER IN BUSINESS