



BENCH[®]

Channel trends and insights

December 2020

Introduction to December trends and insights

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This year has been one of the most significant we've seen in terms of the impact it has had on society and our industry. That has brought with it some seismic shifts in media consumption habits, movement patterns and brand strategy,

We've spent time over the past nine months collating insights and the impact these shifts have had on media, as well as the opportunities that can be presented for brands.

Have a read of our previous content to reflect on the year that was (reach out if needed!). Read on to receive the latest updates from this month, as well as our predictions for the summer months ahead, across all digital channels from BVOD and Audio to DOOH.

BVOD



The consumption of high-quality long-form digital video on a TV screen is outpacing the rest of the ad-supported media market. This in turn is driving a significant increase in investment from advertisers. Video continues to outperform the overall general display market with a 15% growth in FY20 vs FY19, and has increased its share of the general display market to 53%. As part of this growth, publisher's video expenditure share attributed to connected TV has increased from 23% to 41% over the last 15 months.

- IAB Australia.

Seven West Media, 7plus: 7plus reached 2.30m people in Nov (-1% MOM) and 1.74m devices (+3% MOM). In November, 7plus had 35% CFTA Share. 15 of the top 25 most streamed programs were from Seven. 67% of BVOD minutes came from CTV devices.

Nine Entertainment, 9Now: 9Now lead with a 41.9% share of minutes, reaching on average 3.8m people monthly, with FTA live minutes having a share of 46%, taking out 8 of the top 10 streamed programs YTD. This is largely taken up by State of Origin and NRL Grand Final Day streams.

SBS, SBS on Demand: SBS audience numbers are currently at 1.46m+ monthly active users and 8.80m registered subscribers, with a VPM share of 28.7% in November (with 30% share on the weekends). Top shows that are driving consumption include *Fargo S4*, *Alone*, *Spooks* & *The Killing*. 64% of streams were via Connected TV as well.

Network 10, 10Play: 10Play has recorded 47m BVOD minutes viewed last week, and 3.3b minutes viewed YTD (+14% YoY). The top 3 BVOD shows last week include *The Bold & The Beautiful*, *Fast-Track*, *Neighbours* and *Have You Been Paying Attention*.

Foxtel & Kayo: Kayo hit 644k subscribers (+80% YoY), and is showing 3x Fox exclusive NRL games each Saturday from February. Kayo users have grown beyond pre-Covid levels with average audiences reaching up to 10k UA per game. Foxtel has recorded 1.2m UAs with top shows including *Wentworth*, *Raised by Wolves*, *Modern Family* & *Seinfeld*.

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Video



Video content has seen tremendous growth in 2020. This is due to a number of factors primarily driven by Covid such as the loss of a traditional commute and the increased feeling of digital connectivity.

Users have turned to video consumption across all devices for news, sports highlights, and general web browsing.

This creates an opportunity for brands to create impactful, sensitive and contextually relevant content to promote themselves, their products and their services.

We expect this to continue throughout Q1 and into the remainder of 2021.

Video inventory has been tighter than usual throughout December, creating a need to book guaranteed placements in advance.

The news, travel and entertainment verticals have seen the most video content consumption throughout December. This is likely to remain throughout the rest of summer.

YouTube is expected to see another major spike in consumption across ALL demographics throughout the upcoming holidays.

Cross-device video consumption is becoming the norm, with more and more users tuning in via the CTV.

Sports video across cricket and basketball are spiking with the new seasons launching. NRL and AFL are now behind us.

Consumption timings are changing with the traditional commute no longer part of our day-to-day lives. We now see more even daily consumption trends than in the past.

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News Corp



Audio



With the summer months upon us, the audio industry will see a tremendous spike in consumption, offering great opportunities for brands to connect with consumers in an intimate and impactful environment.

2021 will be the year of multi-device connectivity with half of all users tuning in across more than one device. Ensuring that digital campaigns run across all devices is ever more important as the space becomes more fragmented.

Approx 90% of audio listeners tune in more over summer compared to the rest of the year.

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Nearly 50% of users listen to radio across multiple platforms, both digital and traditional.

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35% of all listeners consume audio via their smartphones.

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Audience numbers since the beginning of Covid have seen all Australian states increase consumption by +50%.

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Melbourne specifically has seen growth of +70%.

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Spotify data shows that the F18-24 demographic is its biggest summer music streamers.

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Native



As consumers move away from their desks and into holiday mode, native content consumption naturally grows.

With more time to ourselves to keep up to date with the latest in global news, sports content, product reviews and general web browsing, brands that provide the opportunity to consumers to click through to consume high-quality native content will be rewarded with consumers' eyeballs.

The key is producing amazing native content to create the most impact possible.

Native content consumption is expected to skyrocket throughout the summer months.

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Retail, travel and entertainment categories are slated to be the most impactful verticals.

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Brands that are developing high-quality native content are seeing the greatest success in this space. Creating relevant, impactful and sensitive messaging is key to success.

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DOOH



From screens inside doctor's offices, grocery stores and gyms to roadside billboards and bus shelters, there are a variety of ways to reach audiences. Programmatic DOOH allows buyers to layer on data-driven audiences to increase campaign efficacy and be flexible in optimising strategy by shifting budgets to different locations, adding venue types as restrictions lift and swapping in relevant messaging based on current circumstances.

In Melbourne, audience volumes surged back to 80% of 2019 levels in just 3 weeks following the end of lockdown with 79% of Victorians surveyed looking forward to getting back into the office.

QMS Billboards: Bus shelters will be live in NZ by the end of Q1 2021.

VMO & Shopper Media have added large-format retail screens as shoppers give retailers a boost in the lead-up to Christmas.

VMO has added 260 new sites to its national VMO Active Network with more than 1000 clubs, 4000 screens and 1.35m members (Fitness First, GoodLife, Anytime Fitness, Fernwood & others).

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QMS

VMO


SHOPPER MEDIA GROUP



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For more information about programmatic trends and insights, or if you have any questions, please get in touch; we're here to help.

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