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# Channel trends and insights

September 2020

# Introduction to **September** trends and insights

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Last month, we featured channel insights and trends, but also zoomed out to focus on the **evolution of programmatic** and channel journeys in the digital landscape.

Learn about the programmatic journey [here](#).

This month, we've rounded up the **latest channel trends and insights** for September. Read on to learn what's happening across the channels from BVOD to DOOH.

# BVOD



Video has outperformed the overall market with no year change in expenditure YoY despite COVID-19, with an increase in 5% share.

The latest IAB report also showed that video expenditure share attributed to CTV increased on previous quarter to 41%, taking share from mobile which was down slightly to 24%. Desktop expenditure accounted for 35%.

**Seven West Media, 7Plus:** July reached its highest ever streaming month of all time with total market growth of 34%. *Big Brother* was 7Plus's highest ever streamed show. 3.6m+ signed in and verified user based with average 1.6m active daily users across 7Plus.

**Nine Entertainment, 9Now:** 9Now achieved CFTA minutes share of 42% YTD, with *Desperate Housewives* proving to be popular as it continues to be in the top 10 watched shows each week. *The Block* has also shown to be a crowd pleaser, being the most streamed program on 9now for the week.

**SBS, SBS on Demand:** SBS audience numbers are currently at 1.75m+ monthly active users and 8.57m registered subscribers, with week 33 being the biggest week of 2020 (121m minutes viewed). 71% of streams were SBS exclusives and 65% were premium drama. SBS recorded OzTAM VPM share of 28.5% in August.

**Network 10, 10Play:** 10Play has recorded 73.6m BVOD minutes viewed last week, +20% WoW with live streams up by 12% YoY. *The Bachelor* has recorded 27.5m BVOD minutes viewed to date, with live stream +50% YoY, followed by *The Masked Singer* with 10.6m BVOD minutes viewed to date and live stream up by 67% YoY.

**Foxtel & Kayo:** Kayo has seen a +36.9% growth YoY in July with subscriptions hitting record high in August 2020 due to AFL, NRL, Supercars, Rugby Union, Formula 1 & MotoGP Return. Foxtel & Kayo combined has an increase of +49.7% of unique audience growth YoY.

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# Video



65% of content publishers' video inventory is sold programmatically, which is +9% on the previous quarter.

With the sports season kicking off, NRL and general sport news content is driving double-digit growth WoW as consumers are engaging with the most up-to-date sport content. Travel verticals have also been seeing exponential growth as international borders remain closed and Australians are seeking destinations for local travel.

**7news** has recorded a 10.3m monthly unique audience with 153% MoM growth across Sport and 267% MoM growth across entertainment verticals.

**Traveller** sees double-digit growth WoW across users (+18%), page views (+21%) and sessions (+21%), largely driven by the latest travel news and updates.

Consumers are turning to the **culture and lifestyle sections** with **SMH Culture** seeing significant WoW growth with +38% in users, +36% in PVs and 49% in sessions.

**The Age's Lifestyle** section has also seen similar trends with +26% in users, +20% in PVs and 76% in sessions.

**9Honey** travel is the go-to destination for travel news and cabin fever relief with unique visitors (+46%), visits (+53%) and page views (+99%).

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# Audio



Podcasting has been booming with the shift of consumer behaviour during and post COVID-19 lockdown, with an increase of listeners. News content has undoubtedly been at the forefront of the listening boom with Acast reporting an extra 2.7m listens on news podcasts between February-May as the COVID-19 pandemic first peaked.

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21% of total time spent streaming in July for SCA occurred on **smart speakers**.

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**SCA** recorded 8.5m active streams (+36% YoY) with 10.1m total listening hours in July.

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**PodcastOne** Australia has seen +155% growth in listening across the COVID-19 period from March to July.

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**Catch Up Radio** has also reached 3.5m downloads this month (+80% YoY).

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**Acast** has seen five consecutive record months for podcast consumption in Australia between March and July, with July recording total local listens of 28.9m..

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**Spotify** is reaching 1/3 of the population with 9.8m active users listening every month.



# Native



As user's online news and content consumption has shot up during the pandemic, relevant content is more valuable than ever.

Consumers look at native ads 53% more frequently than in-banner ads and drive 18% more in purchase intent. Users are finding Native ads targeted content more relevant and less intrusive due to the nature of its unobstructive placement on publishers sites, fitting into the flow of its surrounding content.

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**Apple News Moments** supply has increased quite significantly with >400k moments available every day.

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Verizon has also seen a growth in retail (+56%) as more **retail and FMCG clients** (+52%) activated advanced formats and advanced creatives.

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# DOOH



Audiences are returning to public spaces despite ongoing challenges with the pandemic. Combined roadside and retail audience volumes in the regional areas have recovered to 93% of their level, having dipped as low as 57% in mid-April.

The national audience level is currently at 77% compared to last year, although this has dropped from 84% over the past month due to the impact of restrictions that are currently in place for Melbourne. From a retail perspective across all markets aside from Victoria, audiences are 91% of 2019 levels.

Vistar has partnered with the world's largest omnichannel DSPs to launch the first real-time bidding exchange for OOH advertising.

In July, **Tonic Health Media's** channels were trafficked by 16 million OOH health and wellbeing environments and 9m online health site visitors per month.

Audience foot traffic has returned to 93% of the pre-covid baseline at **VMO's** on the go locations (excluding Victoria).

**Broadsign and Verizon Media's** partnership allows buyers to better tap into consumer audiences and advertisers can easily access DOOH inventory as part of their omnichannel buys.

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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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