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Channel trends and insights

August 2020

Introduction to August trends and insights

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Last month we focused on broadcast video on demand (BVOD) and its specific growth and value as a channel. We also explored why it's a great time to invest in BVOD programmatically.

This month, we zoom out to focus on the **evolution of programmatic** and channel journeys in the digital landscape. Learn about the programmatic journey [here](#). And as always, we've rounded up the **latest channel trends and insights** for August. Read on for more.

BVOD



Buying BVOD programmatically is fast becoming the preferred access point with approx 50% of inventory being bought and sold programmatically.

We are seeing a huge amount of scale in the BVOD space with more than 300 million hours viewed in Australia across BVOD platforms, and we are expecting viewership to continue to grow. Over recent months, the consumption of streaming video and the supply of video inventory has surged.

CTV remains the highest viewing device at 55% followed by Mobile/Tablet at 30% and Desktop at 15%.

Seven West Media, 7Plus: 7Plus has seen strong YoY growth with 65% of total minutes on 7Plus consumed on CTV, which drives incremental reach due to co-viewing experience. *Farmer Wants a Wife* is currently Seven's biggest launch YTD, and is +17% higher than the *Big Brother* launch with 83k VPM for the first episode.

Nine Entertainment, 9Now: 9Now achieved CFTA minutes share of 45% YTD, with 4.6b minutes of content streamed, up 32% from the same time last year. Live streaming of the NRL continues to grow with an average VPM of 14,000, up 94% YoY.

SBS, SBS on Demand: SBS audience numbers are currently at 1.75m+ monthly active users with 70% of the streams exclusive to SBS. 65% of streams are via CTV.

Network 10, 10Play: 10Play is up 126% on their YTD average so far, with the continuing success of *Bachelor in Paradise*, which has recorded 15.3m minutes viewed. Consumption is expected to stay strong with *The Masked Singer* and *The Bachelor* airing in mid-August.

Foxtel & Kayo: With AFL and NRL season back on, Kayo has recorded huge audience growth with average audience per game up +238% for AFL and +308% for NRL. Foxtel and Kayo are also having strong YoY growth and this is driven by their exclusive rights to the Cricket and new content coming from the US to the platform year round.

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Video



Buying online video (both instream and outstream) programmatically has been preferred for some time now.

Consumers are engaging with media to stay informed with the latest national and international news and current affairs. Consumers are also turning to culture and lifestyle sections, and these verticals are seeing huge growth in users, page views and session times.

The H2 sporting calendar is fuelling projections of continued growth in the back half of 2020 with the coming back of AFL, NRL, Cricket, Rugby Union, Golf, Motorsport and Football.

9news sees WoW increases across all key metrics with 5.3m unique visitors, +3% on last week. Visits and Page Views also saw an increase of 6% and 7% respectively.

9Honey are seeing significant growth WoW with Unique Visitors and Visits increasing 26% and 17%.

AFR's Technology section sees double-digit growth WoW across users (+15%), Page Views (+22%) and sessions (+10%), largely driven by content around workplace technology and technology reviews.

As news breaks, people turn to **SMH** and **The Age** to stay informed on the latest updates, with WoW growth of +2% across both publications.

SBS news and current affairs programs have significant average audience % change of 37%.

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News Corp



Audio



Programmatic audio buying is scaling up in the Australian market, which is evident in the growth that most publishers are seeing. More and more transactions across catch-up, live streaming and podcasting are pushing the channel towards its tipping point.

We are continuing to see huge YoY growth across live radio streaming and catch-up radio podcasts as consumers settle into the new normal and tune to audio for entertainment and current affairs.

There has been steady growth across Entertainment, Lifestyle, Health and News categories as consumers balance their needs to stay informed and entertained.

The growing popularity of Business and Finance content has been fuelled as Australians face new economic challenges and opportunities during this period.

Smart Speakers represent 20% of total SCA Live Radio Streaming and mobile listening is also up over 48% YoY.

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SCA's audience tallied up 9.7m Total Listening Hours in June across **Live Radio Stream**, with average sessions on Mobile around 40mins, Desktop 1.5hrs and Smart Speakers over 2hrs 20min.

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Podcast listening has increased significantly when compared to pre COVID-19 data (Jan-March vs March-June), demonstrating strong growth and surging popularity of podcasts.

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SoundCloud experienced yet another huge month with a listener increase of +15% YoY.

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With the **NRL** season restart we are seeing an increase of fans tuning into NRL games via the live radio stream with 105k total live streams (+40% YoY) and 54k total listening hours (+46% YoY).

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Native



Buying native via a DSP or via a native network's platform has been the preferred method of buying for quite some time now. Native is quite a mature channel when it comes to its RTB, which is evident by the sheer volume of RTB transactions and brands that leverage the channel and tech behind it.

Consumption times are shifting as more consumers are confined to their homes and local suburbs due to the latest state and territory restrictions. There are also spikes during late evening suggesting consumers are staying up later to consume media.

Since COVID began, advertising spend has increased in several thriving verticals including home & lifestyle, business and finance, e-commerce and health & fitness, but has decreased in others, including education and travel.

Dynamic Product Ads across Verizon's AU native marketplace have seen an increase in engagement, CPC efficiency and substantially decreased CPA across retail advertisers.

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Page views for articles about **health insurance** are up across the Taboola network with 234k page views focused on this topic, an +800% increase in traffic.

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Research shows that native ads are **higher in view time** than traditional display banners, with +20% increase in brand trust and +16% in purchase intent.

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DOOH



DOOH is on a very interesting programmatic journey as the last piece of the programmatic puzzle. The industry has some truly amazing capabilities in this space that buyers and brands are testing and beginning to scale.

The Australian OOH audience has been restored to 81% of its pre-COVID size nationally at the start of July, ahead of international markets such as the UK.

However, we are still seeing fluctuations and changing behaviours in the Australian OOH audience with audiences returning at various speeds, subject to state laws and restrictions. There is no better time for advertisers to fully embrace programmatic OOH as brands will be able to have the flexibility to update, adjust and optimise their campaigns in real time as required or dictated by the changes in the market.

Consistently high visitation to **GPs and Pharmacies** due to COVID-19 concerns suggests that OOH spaces in the health space will continue to be a robust environment.

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QMS DYNAMiQ is able to predict potential growth stories such as the increased audience in Queensland as the state experiences an **influx of holiday makers in July** (The Gold Coast experienced a 19% uplift on the first day of school holidays).

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Vistar has partnered up with Foursquare to ensure buyers are always making targeting decisions that **reflect the most current landscape** based on the most up-to-date real-world changes.

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We are seeing a strong resurgence of **foot traffic** in all markets and venue types (outside of Victoria) as restrictions lift.

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Vistar is now live with VMO Active Network (gyms), QMS Canberra airport billboards, Big Outdoor billboards in QLD & Tonic Health pharmacies.

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VISTAR MEDIA

QMS

VMO


SHOPPER
MEDIA GROUP



adline
Media Network

tonic
HEALTH MEDIA





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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