ThinkNewsBrands FUNDAMENTALS H1, 2020





NEWS BRANDS

Key facts about print and digital news sites in Australia





What are news brands?

- The term 'news brands' refers to the newspapers and digital platforms of Australia's leading news publishers. News brands are the go-to trusted source of news content for Australians and, as a result, the professionally produced content is sourced, syndicated and repurposed across all other media platforms 24-7
- When readers interact with news brands, it's a lean-forward experience. Unlike other media channels, news brands have an actively engaged audience
- Digital news brands are proven to be particularly strong in moving prospective consumers through the purchase funnel by shifting the needle on how people feel about the brands that are advertising¹

Source: 1 Comscore ;The Halo Effect: How Advertising on Premium Publishers Drives Higher Ad Effectiveness Jul2016

2 emmaTM, 12 months to June 2020. Readership based on last four weeks. Survey conducted by Ipsos Connect, people 14+. ALSO Nielsen Digital Panel, 4 weekly periods to June 2020, people 14+ calibrated to Digital Content Ratings (DCR) June 2020 People 14+.

- News brands have the scale to drive business outcomes with more than 18.3m Australians engaging with them each month. That's 97% of the population aged $14+^2$
 - 17.7m Australians engage with digital news websites every month
 - 11.6m Australians read newspapers every month
- Printed news brands drive the daily agenda with almost two in three readers reading a newspaper before midday



Australia's leading news brands

A powerhouse news and editorial engine, news brands create timely, relevant, trusted content that feeds the most read websites, papers, sections and inserts in Australia.



ESCAPE GoodWeekend

THE VOICE OF TASMANIA BOSS stellar

goodfood BOF

The Mest Anstralian

Domain

national metro

545

regional

branded newspaper sections

newspaper Inserted magazines

digital news sites









WHO IS READING NEWS BRANDS?

Cross platform readership by demographic, platform, section and over time





News brands readership across all sites and publications

Advertiser & non-advertiser supported newspapers, d mastheads and news websites¹

Advertiser supported newspapers, digital mastheads news websites²

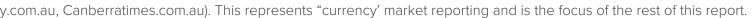
 $emma^{TM}$ newspapers and digital mastheads total³

Source: emmaTM, 12 months to June 2020. Readership based on last four weeks. Survey conducted by Ipsos Connect, people 14+. ALSO Nielsen Digital Panel, 4 weekly periods to June 2020, people 14+ calibrated to Digital Content Ratings (DCR) June 2020 People 14+.

*1 Represents *2 and *3 (below) also adding in All other News related websites that are not owned by the Australian newspaper publishers eg SBS News, DailyMail, ABC online, DailyExpress, Buzzfeed *2 Represents *3 (below) also adding in TV News websites that are owned by the newspaper publishers ie 7News, 9News, NBN News, Fox News *3 Includes only Australian publishers' news brands (newspapers, their associated websites and their news websites and their news

	Cross platform	Digital	Newspapers
digital	18.3m	17.7m	11.6m
s and	18.1m	17.1m	11.6m
	18m	16.9m	11.6m



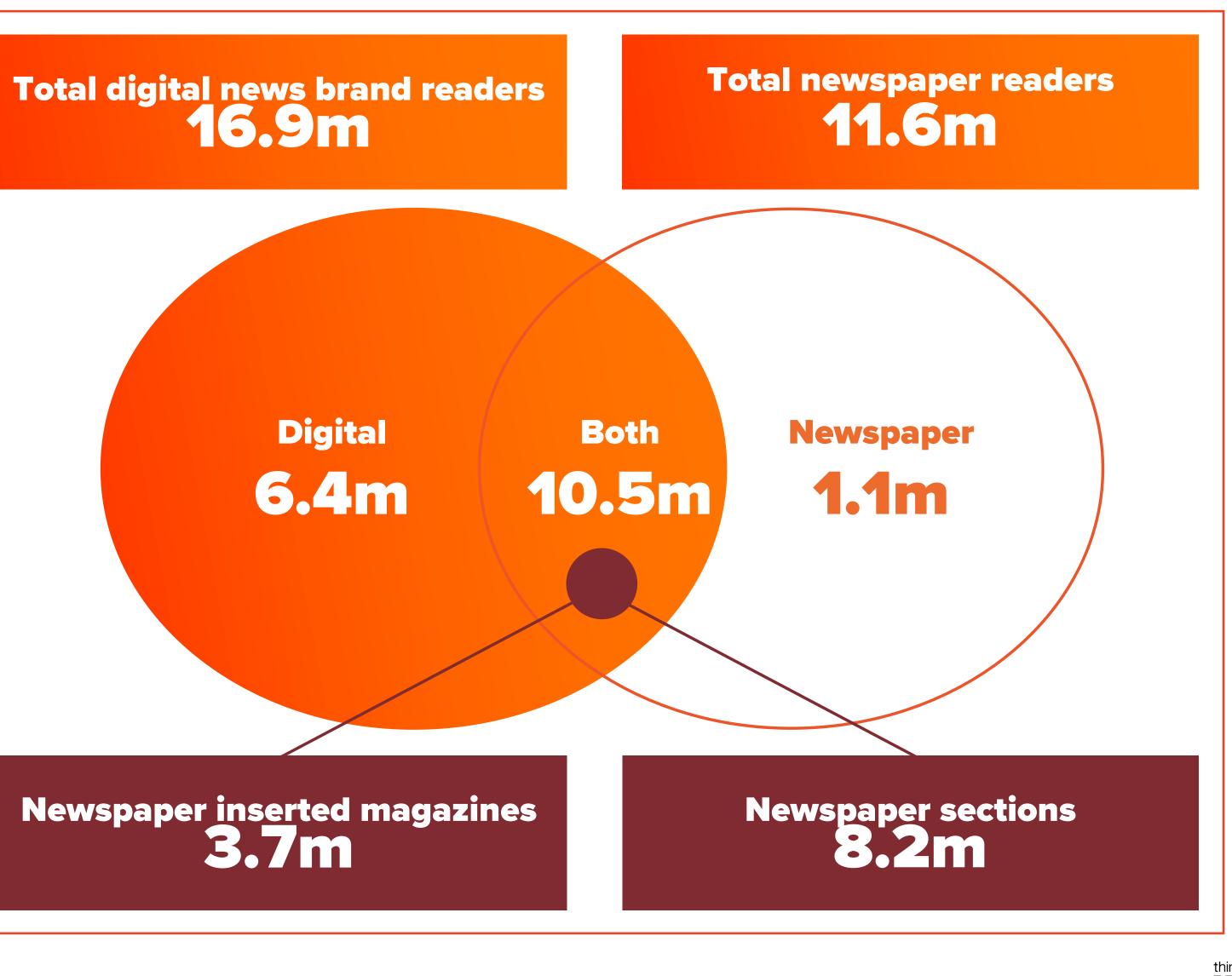








Readership by news type

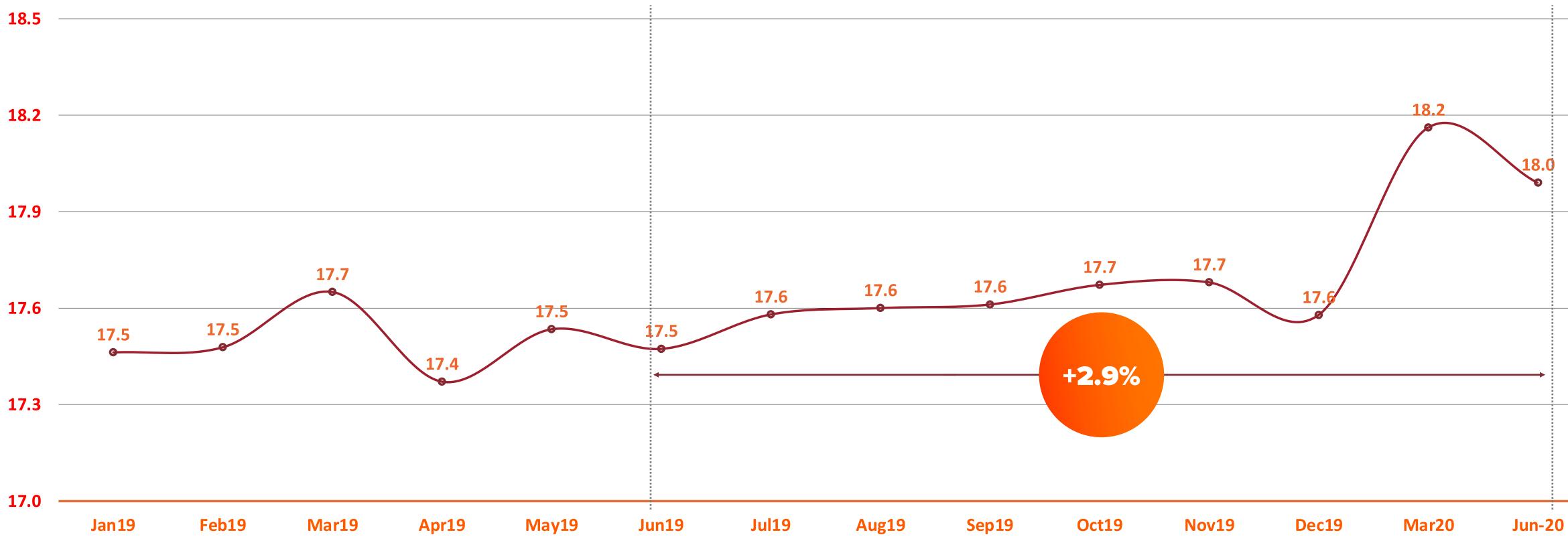






Readership over time

News brands readership (millions)

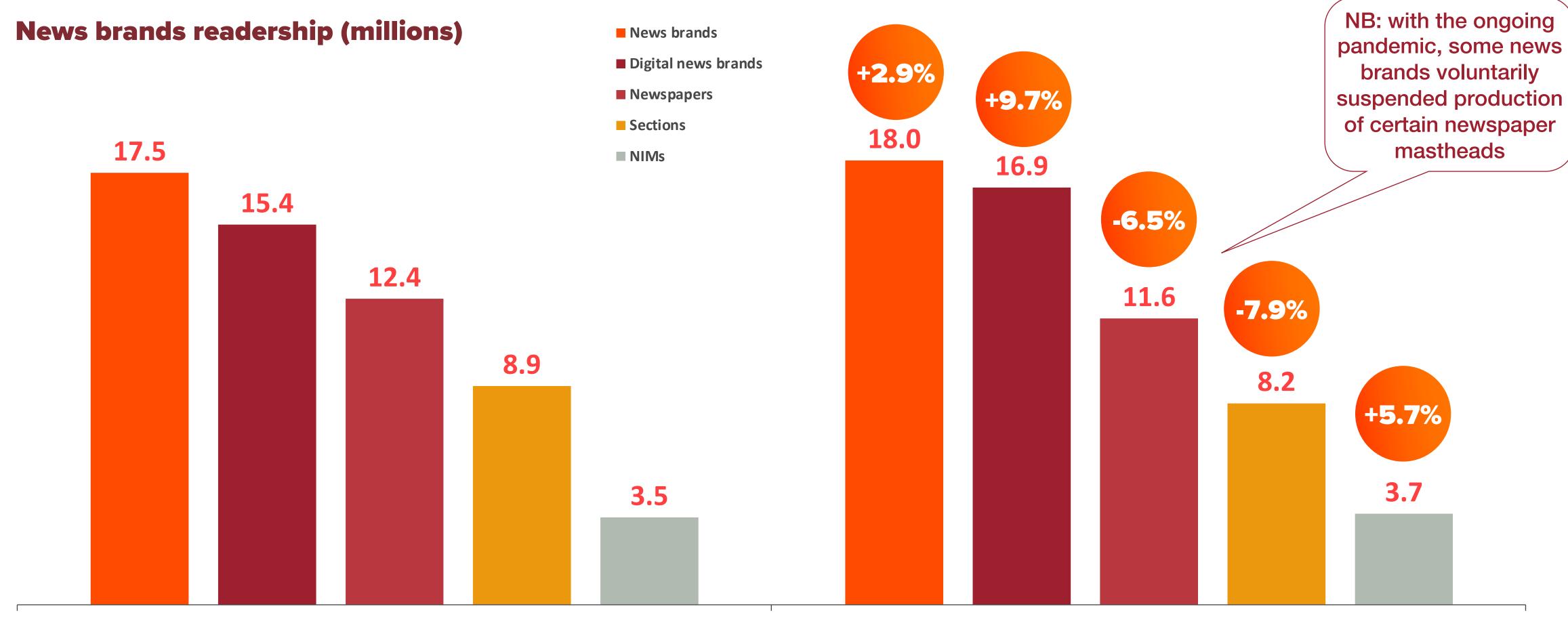


Source: emmaTM, 12 months to June 2020. Newspaper readership based on last four weeks. Survey conducted by Ipsos Connect, people 14+. ALSO Nielsen Consumer & Media View (CMV). Nielsen Digital Panel, 4 weekly periods to June 2020, people 14+ calibrated to Digital Content Ratings (DCR) Jun 2020 People 14+.





Readership news type growth/decline



Jun19

Source: emmaTM, 12 months to June 2020. Newspaper readership based on last four weeks. Survey conducted by Ipsos Connect, people 14+. ALSO Nielsen Consumer & Media View (CMV). Nielsen Digital Panel, 4 weekly periods to June 2020, people 14+ calibrated to Digital Content Ratings (DCR) Jun 2020 People 14+.

Jun20





Readership news type by age/region

Readership and reach (Jun20)	Reach % to popn 14+	Totals	Male	Female	14 to 34	35 to 54	55+	Metro markets	Regional markets
Reach to age 14+		95%	94%	95%	91%	96%	98%	95%	95%
Population 14 +	100%	18.9 m	9.3m	9.6 m	6.7 m	6.0m	6.3 m	13.3 m	5.6 m
News brands	95%	18.0 m	8.8 m	9.2 m	6.1m	5.8 m	6.2 m	12.6 m	5.4 m
Digital news brands	89%	16.9 m	8.2 m	8.7 m	5.6 m	5.5m	5.8m	11.9 m	5.0m
Newspapers	61%	11.6 m	5.8 m	5.9 m	3.0 m	3.8 m	4.9 m	7.8 m	3.9 m
Any section of the newspaper	43%	8.2 m	4.2 m	4.0 m	1.9 m	2.6 m	3.7 m	5.7 m	2.4 m
Newspaper inserted magazines (NIMs)	19%	3.7 m	1.7 m	2.0m	0.8 m	1.0m	1.9 m	2.7 m	1.0m





HOW DO AUSTRALIANS READ NEWS BRANDS?

Readership and engagement by location and demographic

Sticker mule





When, how frequent and how long?

WHEN

63% of yesterday's newspaper readers read them between 6am & 12pm*

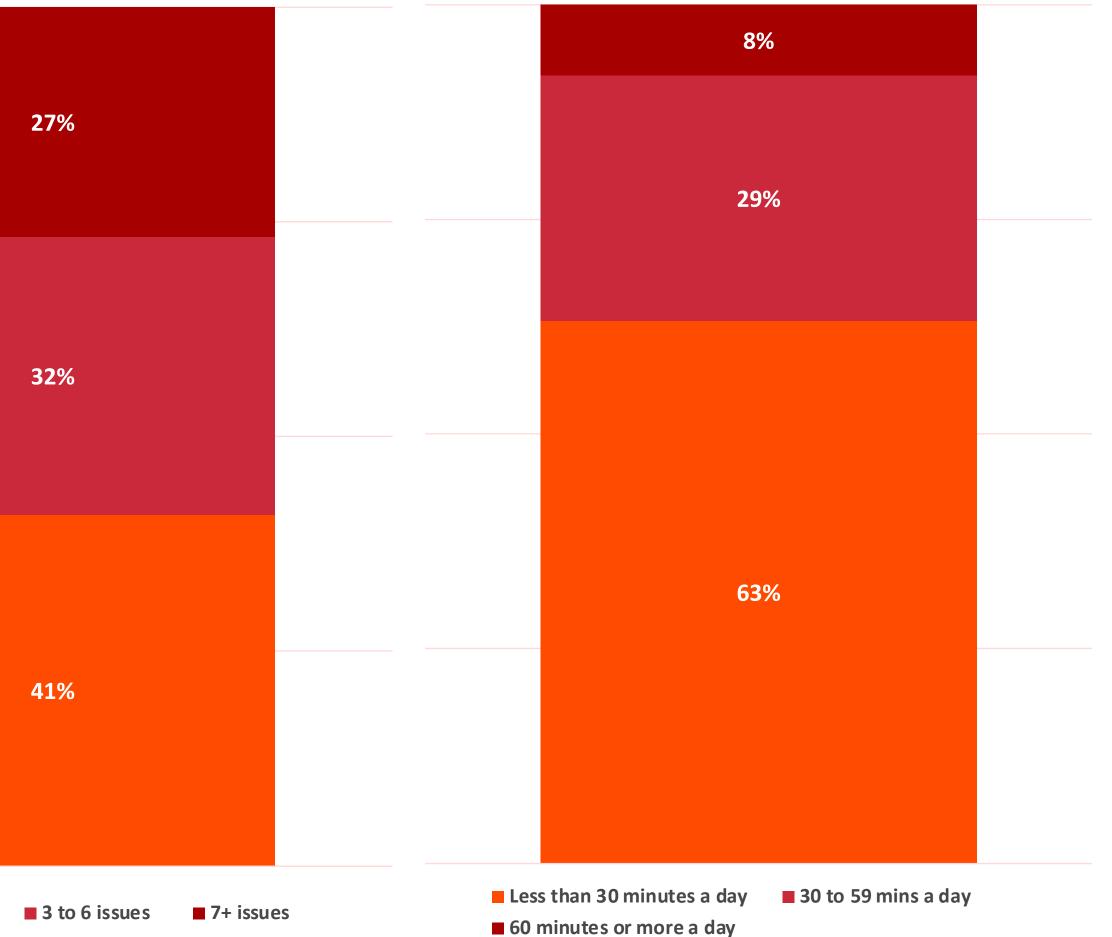
63% 31% 12% 5% ■ 6am to 12pm yesterday 1 to 2 issues 12pm to 6pm

HOW FREQUENT

HOW LONG

27% of newspaper readers Typically read 7 or more issues a week

37% of yesterday's newspaper readers read them for more than 30 minutes

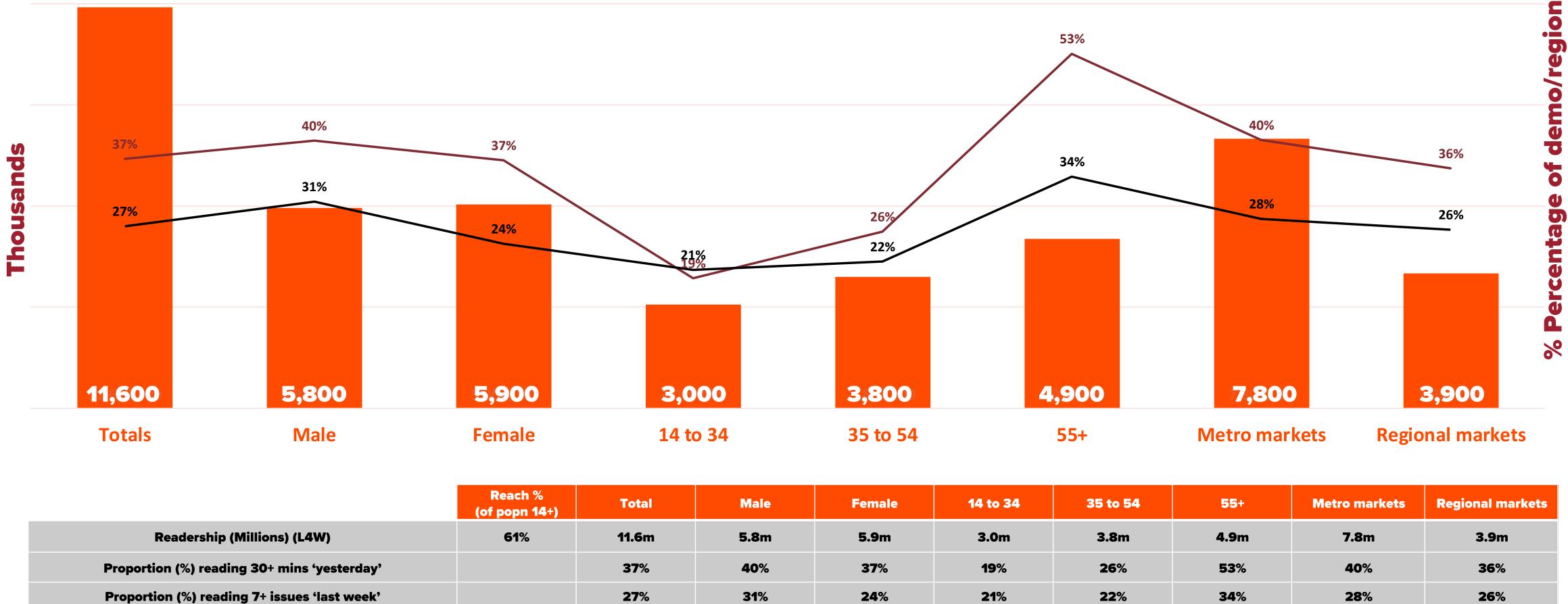






Regular readership by age/region

Total newspaper readership (000s) & percentage who read 30+ mins/7+ issues pw



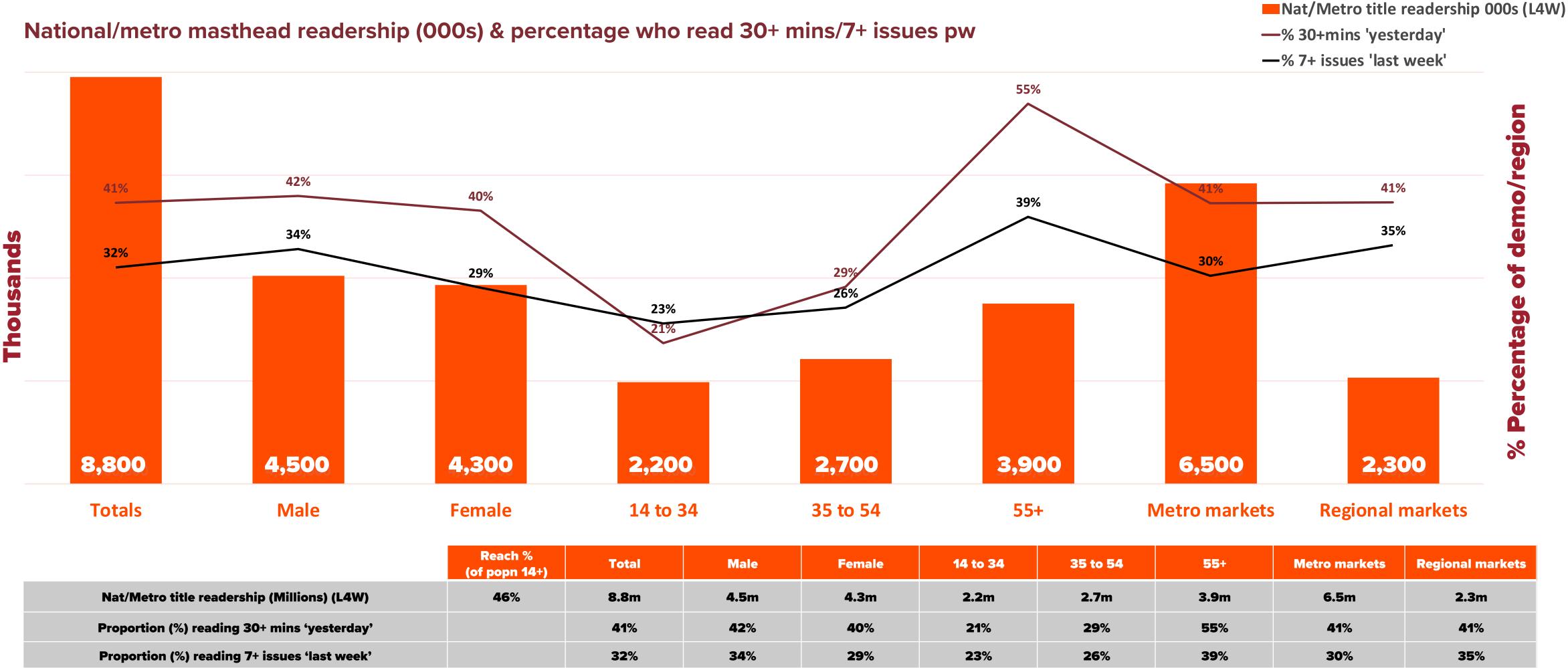
Source: emmaTM, 12 months to June 2020. Total readership based on last four weeks (June 2020). Survey conducted by IPSOS Connect, People 14+. Readership >=30mins based on time spent reading newspapers yesterday (June 2020). 7+ issues pw is per typical week (June 2020). Metro market as per OzTam definition. Regional markets are all markets outside of the defined OzTAM metro areas.

Readership 000's (L4W) -% 30+ mins 'yesterday' -% 7+ issues 'last week'

Male	Female	14 to 34	35 to 54	55+	Metro markets	Regional markets
5.8m	5.9m	3.0m	3.8m	4.9 m	7.8m	3.9 m
40%	37%	19 %	26%	53%	40%	36%
31%	24%	21%	22%	34%	28%	26%



Regular readership: national/metro titles by age/region

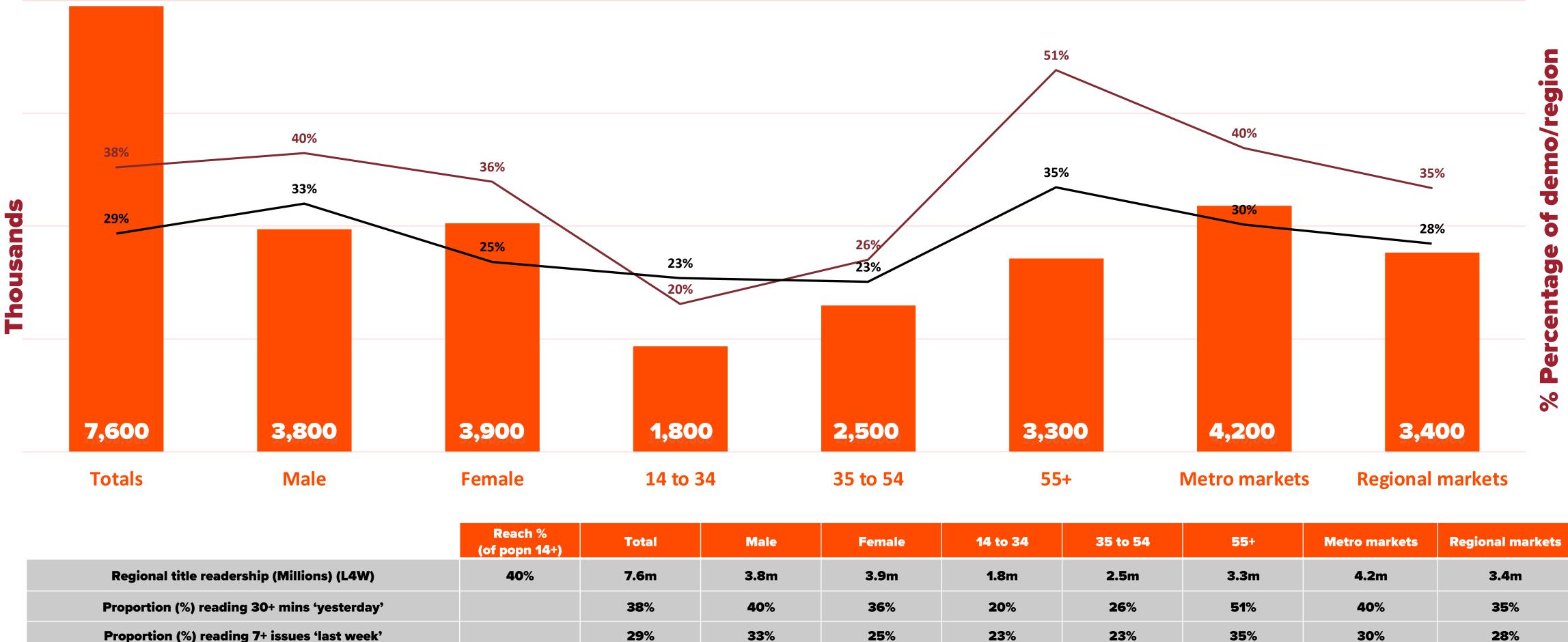


Source: emmaTM, 12 months to June 2020. Total readership based on last four weeks (June 2020). Survey conducted by IPSOS Connect, People 14+. Readership >= 30 mins based on time spent reading newspapers yesterday (June 2020). 7+ issues pw is per typical week (June 2020). Metro TV market as per OzTam definition. Regional markets are all markets outside of the defined OzTAM metro areas. Nat/Metro newspapers are The Australian, Financial Review, The Saturday Paper, Daily Telegraph, Sydney Morning Herald, Herald Sun, The Age, The Adelaide Advertiser, Courier-Mail and West Australian/Sunday Times – that includes their Mon-Fri editions & their Weekend editions. All other papers are classified as Regional.

Male	Female	14 to 34	35 to 54	55+	Metro markets	Regional markets
4.5m	4.3m	2.2m	2.7 m	3.9 m	6.5m	2.3 m
42%	40%	21%	29%	55%	41 %	41%
34%	29%	23%	26%	39%	30%	35%

Regular readership: regional titles by age/region

Regional masthead readership (000s) & percentage who read 30+ mins/7+ issues pw



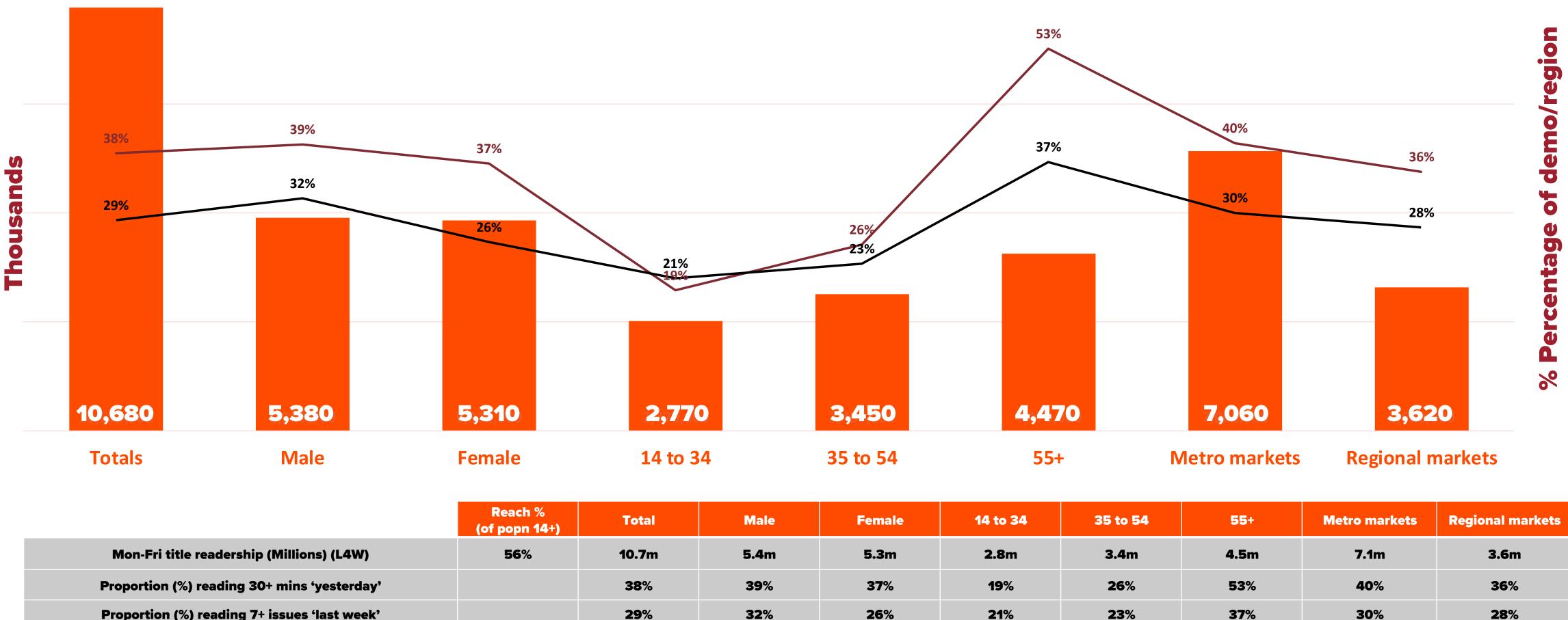
Source: emmaTM, 12 months to June 2020. Total readership based on last four weeks (June 2020). Survey conducted by IPSOS Connect, People 14+. Readership >=30mins based on time spent reading newspapers yesterday (June 2020). 7+ issues pw is per typical week (June 2020). Metro TV market as per OzTam definition. Regional markets are all markets outside of the defined OzTAM metro areas. Nat/Metro newspapers are The Australian, Financial Review, The Saturday Paper, Daily Telegraph, Sydney Morning Herald, Herald Sun, The Age, The Adelaide Advertiser, Courier-Mail and West Australian/Sunday Times – that includes their Mon-Fri editions & their Weekend editions. All other papers are classified as Regional.



Male	Female	14 to 34	35 to 54	55+	Metro markets	Regional markets
3.8m	3.9m	1.8m	2.5m	3.3m	4.2 m	3.4 m
40%	36%	20%	26%	51%	40%	35%
33%	25%	23%	23%	35%	30%	28%

Regular readership: Mon-Fri titles by age/region

Mon-Fri masthead readership (000s) & % who read 30+ mins/7+ issues pw



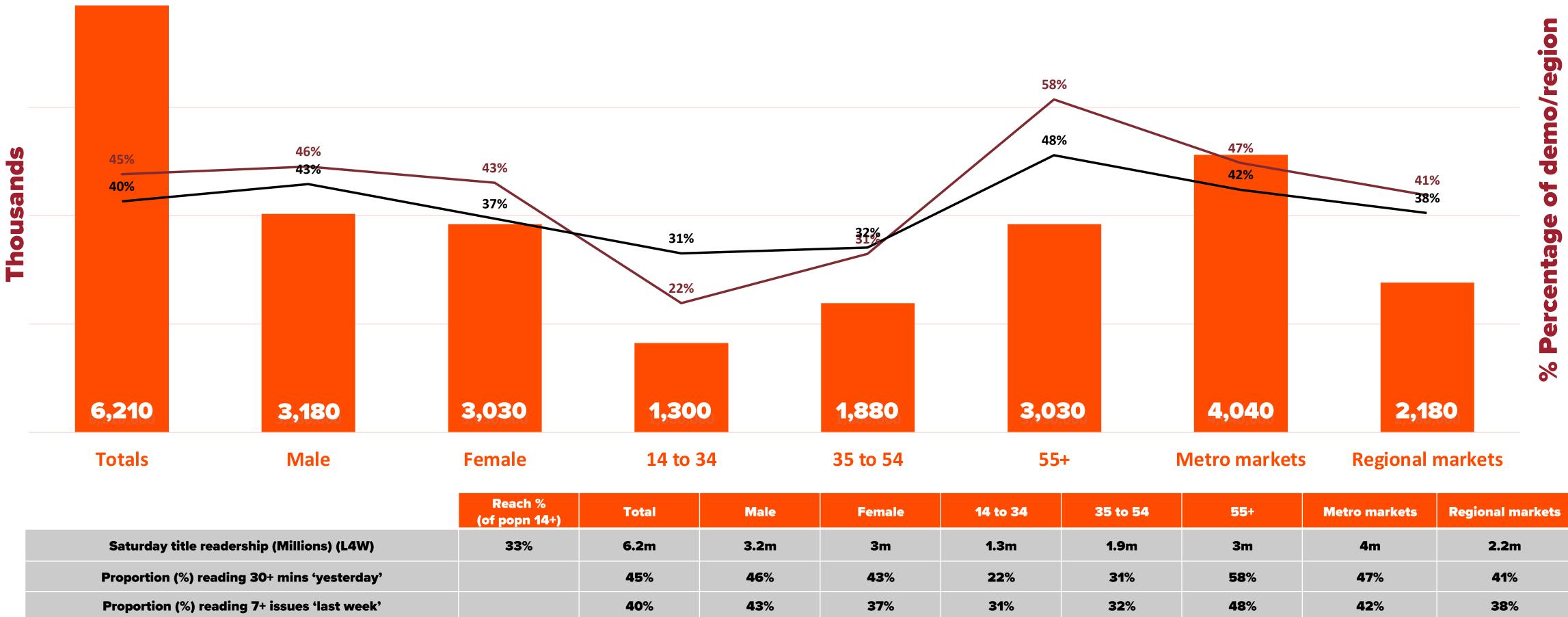
Source: emmaTM, 12 months to June 2020. Total readership based on last four weeks (June 2020). Survey conducted by IPSOS Connect, People 14+. Readership >=30mins based on time spent reading newspapers yesterday (June 2020). 7+ issues pw is per typical week (June 2020). Metro TV market as per OzTam definition. Regional markets are all markets outside of the defined OzTAM metro areas.



Male	Female	14 to 34	35 to 54	55+	Metro markets	Regional markets
5.4m	5.3m	2.8m	3.4m	4.5 m	7.1 m	3.6m
39%	37%	19%	26%	53%	40%	36%
32%	26%	21%	23%	37%	30%	28%

Regular readership: Saturday titles by age/region

Saturday masthead readership (000s) & % who read 30+ mins/7+ issues pw



Source: emmaTM, 12 months to June 2020. Total readership based on last four weeks (June 2020). Survey conducted by IPSOS Connect, People 14+. Readership >=30mins based on time spent reading newspapers yesterday (June 2020). 7+ issues pw is per typical week (June 2020). Metro TV market as per OzTam definition. Regional markets are all markets outside of the defined OzTAM metro areas.





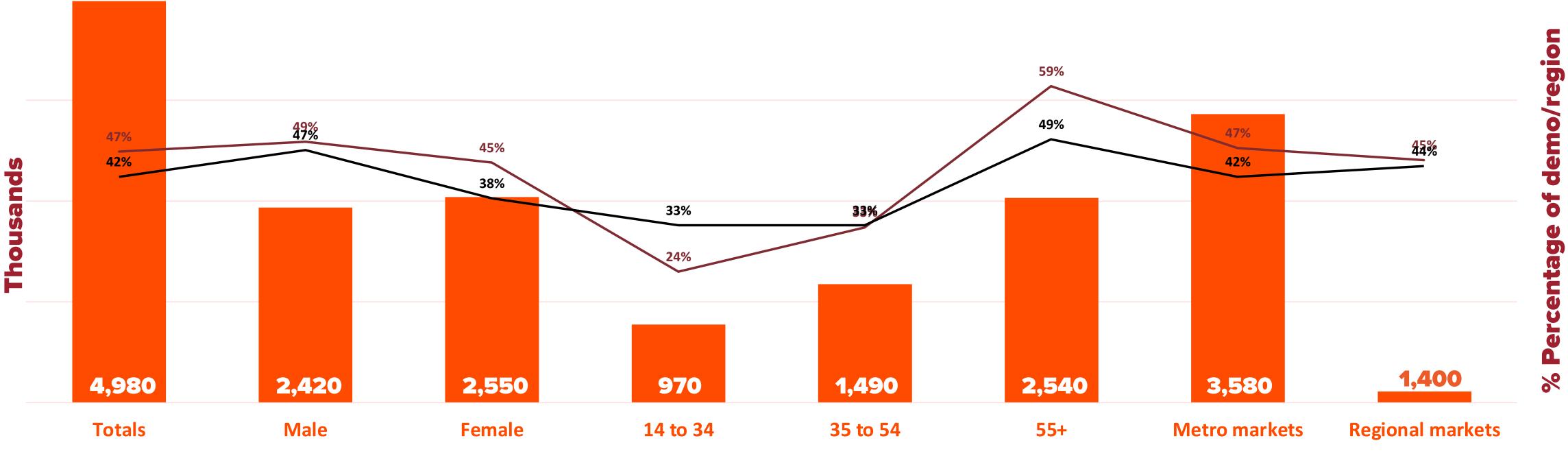
-% 30+mins 'yesterday'

-% 7+ issues 'last week'

Male	Female	14 to 34	35 to 54	55+	Metro markets	Regional markets
3.2m	3m	1.3m	1.9m	Зm	4m	2.2m
46%	43%	22%	31%	58%	47 %	41%
43%	37%	31%	32%	48%	42%	38%

Regular readership: Sunday titles by age/region

Sunday masthead readership (000s) & % who read 30+ mins/7+ issues pw

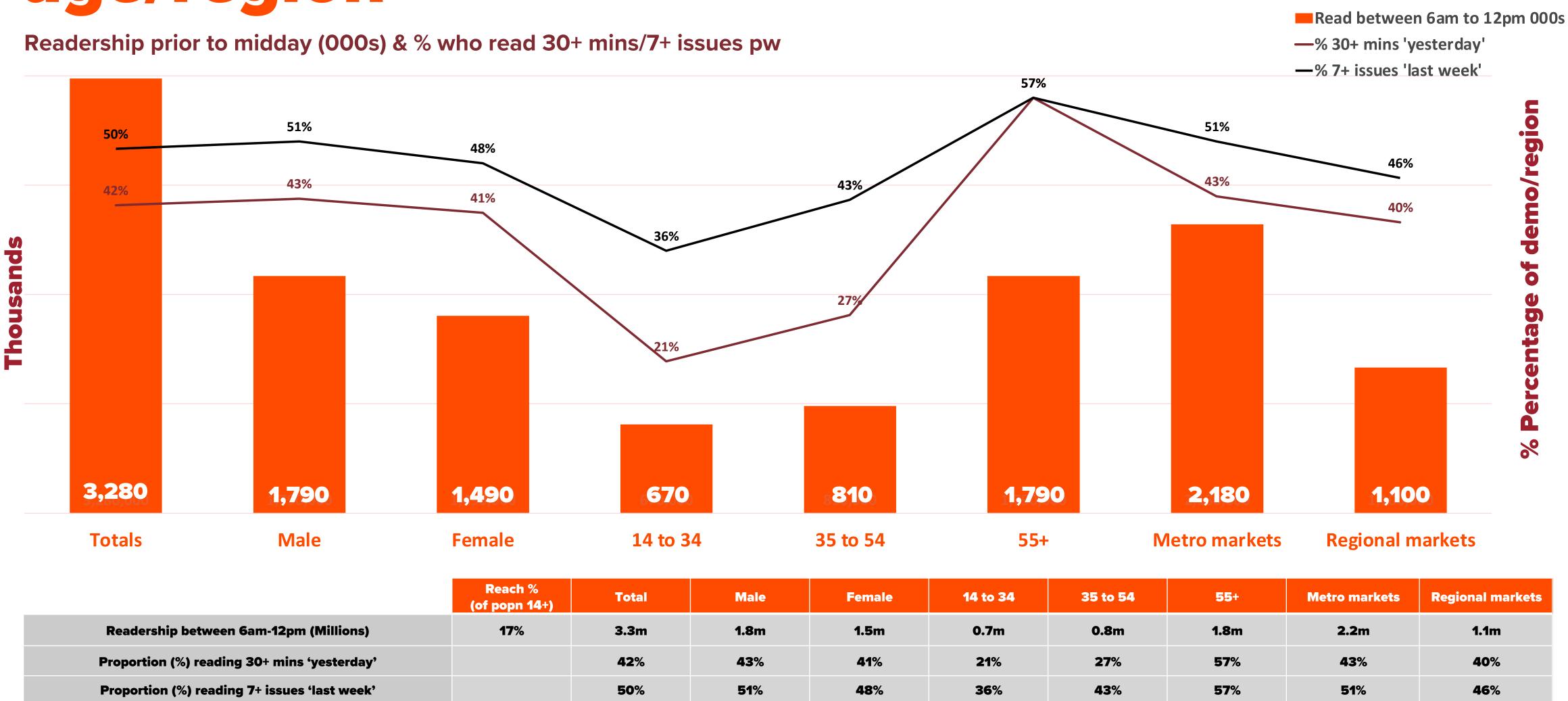


	Reach % (of popn 14+)	Total	Male	Female	14 to 34	35 to 54	55+	Metro markets	Regional markets
Sunday title readership (Millions) (L4W)	26%	5m	2.4 m	2.6 m	1 m	1.5m	2.5m	3.6m	1.4 m
Proportion (%) reading 30+ mins 'yesterday'		47 %	49%	45%	24%	33%	59%	47%	45%
Proportion (%) reading 7+ issues 'last week'		42%	47%	38%	33%	33%	49%	42%	44%

Source: emmaTM, 12 months to June 2020. Total readership based on last four weeks (June 2020). Survey conducted by IPSOS Connect, People 14+. Readership >=30mins based on time spent reading newspapers yesterday (June 2020). 7+ issues pw is per typical week (June 2020). Metro TV market as per OzTam definition. Regional markets are all markets outside of the defined OzTAM metro areas.



Regular readership: prior to midday by age/region



Source: emmaTM, 12 months to June 2020. Total readership based on last four weeks (June 2020). Survey conducted by IPSOS Connect, People 14+. Read newspapers 6am to 12pm represents those who did so yesterday. Readership >=30mins based on time spent reading newspapers yesterday (June 2020). 7+ issues pw is per typical week (June 2020). Metro TV market as per OzTam definition. Regional markets are all markets outside of the defined OzTAM metro areas

Male	Female	14 to 34	35 to 54	55+	Metro markets	Regional markets
1.8m	1.5m	0.7 m	0.8m	1.8 m	2.2m	1.1m
43%	41%	21%	27%	57%	43%	40%
51%	48%	36%	43%	57%	51%	46%

WHAT SECTIONS ARE AUSTRALIANS READING?

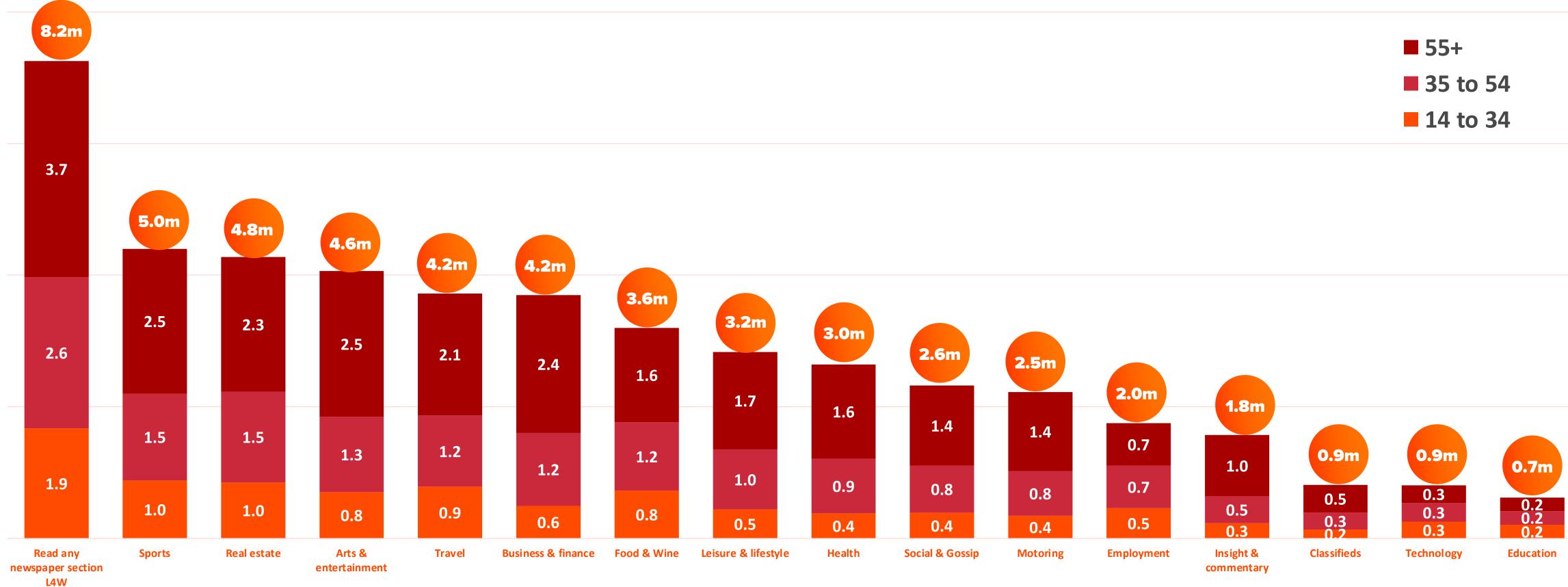
Newspaper sections – readership and reach by demographic





Readership by section type

Read a newspaper section L4W (millions)









Section readership by age/region

Monthly Reach (m)	Reach % to popn 14+	Total	Male	Female	14-34	35-54	55+	Metro markets	Regional markets
Popn 14 +	100%	18.9 m	9.3 m	9.6 m	6.7 m	6.0m	6.3m	13.3 m	5.6 m
Read any Section L4W	43 %	8.2 m	4.2 m	4.0 m	1.9 m	2.6 m	3.7 m	5.7 m	2.4 m
Sports	26 %	5.0m	3.1 m	1.9 m	1.0m	1.5 m	2.5 m	3.5 m	1.5 m
Real estate	25%	4.8 m	2.4 m	2.4 m	1.0 m	1.5 m	2.3 m	3.4 m	1.4 m
Arts & Entertainment	24%	4.6 m	2.1 m	2.4 m	0.8 m	1.3m	2.5 m	3.2 m	1.3 m
Travel	22%	4.2 m	2.5 m	1.7 m	0.9m	1.2 m	2.1 m	3.1 m	1.1m
Business & Finance	22%	4.2 m	1.9 m	2.2 m	0.6m	1.2 m	2.4 m	3.1 m	1.1m
Food & Wine	19 %	3.6 m	1.6 m	2.0 m	0.8m	1.2 m	1.6 m	2.6 m	1.0 m









DGTAL NEWS BRANDS

Digital news brands readership and engagement by demographic





Digital news brands: tech penetration

	Jul-Dec 19	Jan-Jun 20
Screens per household	6.6	6.7
Smart TV	1.8	1.8
PC/Laptop	1.7	1.8
Tablet	1.0	1.0
Mobiles	2.0	2.1
Device penetration		
Smart TV	42%	48%
PC/Laptop	80%	81%
Tablet	60%	60%
Mobiles	87%	94%
Device purchase intention		
Smart TV	7%	7%
PC/Laptop	27%	26%
Tablet	3%	2%
Mobiles	34%	33%

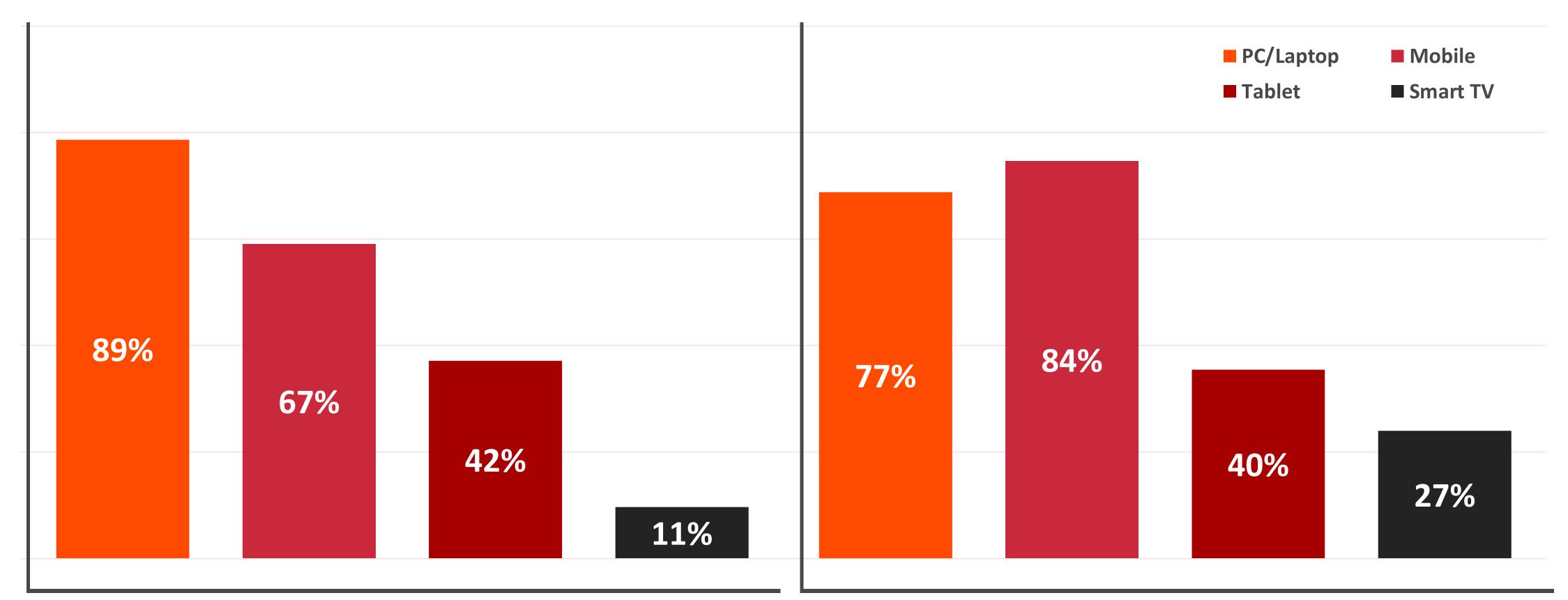
Source: OzTAM & Regional TAM Establishment Survey; DTT, PVR estimates are based on install levels from the combined OzTAM Metro and Regional TAM panels as at last date of each period; Estimates for internet connection, tablet household penetration and internet capable TV in home from combined OzTAM Metro and Regional TAM quarterly Establishment Survey (ES). Based on mobile and landline CATI ES. Internet connection and tablet penetration based on rolling four-quarter averages to stabilise month-to-month trends. Estimate for internet capable TV in home refers to the capability to be internet connected, whether connected or not.. Purchase Intent N12M: Nielsen CMV 12 months to Dec19 & Jun20. Mobile purchase intention is "will consider"





Digital news brands: devices used

Devices used to access the internet – Penetration of pop aged 14+ (%)



Jun-16

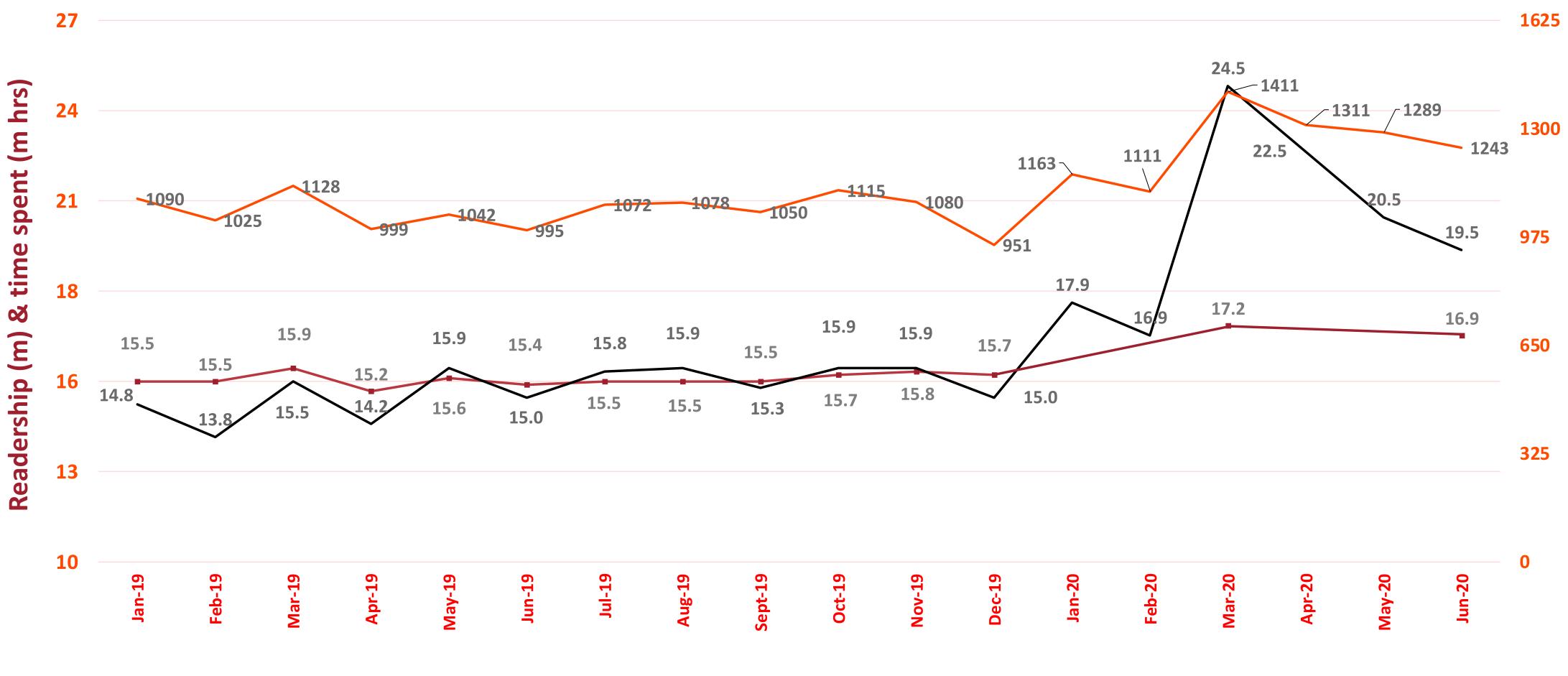
Jun-20





Digital news brands: readership, page views and time spent

Digital news brands - Readership, page views and time spent



Source: Readership is Nielsen Consumer & Media View (CMV). Nielsen Digital Panel, 4 weekly periods to June 2020, people 14+ calibrated to Digital Content Ratings (DCR) Jun 2020 People 14+. Page views & Time spent are from Nielsen Digital Content Ratings, Monthly Total, January 2020 - June 2020, P2+, Digital C/M, Text. This is a basket of core digital brands that have both newspapers and news websites, but also including news.com.au, brisbanetimes.com.au & WAtoday.com.au (See Appendix)

* Note that DCR is Aged 13+ (ie Time spent & Page views) whereas emma CMV digital brand readership is aged 14+ (above)



Page views (m)



Digital news brands: readership, page views and time spent by demographic

Monthly readership (m) and time spent	Total*	Male*	Female*	14-34 *	35-54	55+
Reach	91%	91%	91%	87%	93%	92%
Population 14 +	18.9 m	9.3 m	9.6 m	6.7 m	6.0m	6.3m
Digital news brands	17.2m	8.5 m	8.7 m	5.8m	5.6m	5.8m
Page views	1243m	680m	526m	284m	531m	324m
Time spent (hours)	19.5 m	12.3 m	7.1m	2.7m	8.7 m	8.1m

Source: Readership is Nielsen Consumer & Media View (CMV). Nielsen Digital Panel, 4 weekly periods to June 2020, people 14+ calibrated to Digital Content Ratings (DCR) Jun 2020 People 14+. Page views & Time spent are from Nielsen Digital Content Ratings, Monthly Total, January 2020 - June 2020, P2+, Digital C/M, Text. This is a basket of core digital brands that have both newspapers and news websites, but also including news.com.au, brisbanetimes.com.au & WAtoday.com.au (See Appendix)

* Note that DCR is Aged 13+ (ie Time spent & Page views) whereas emma CMV digital brand readership is aged 14+ (above)



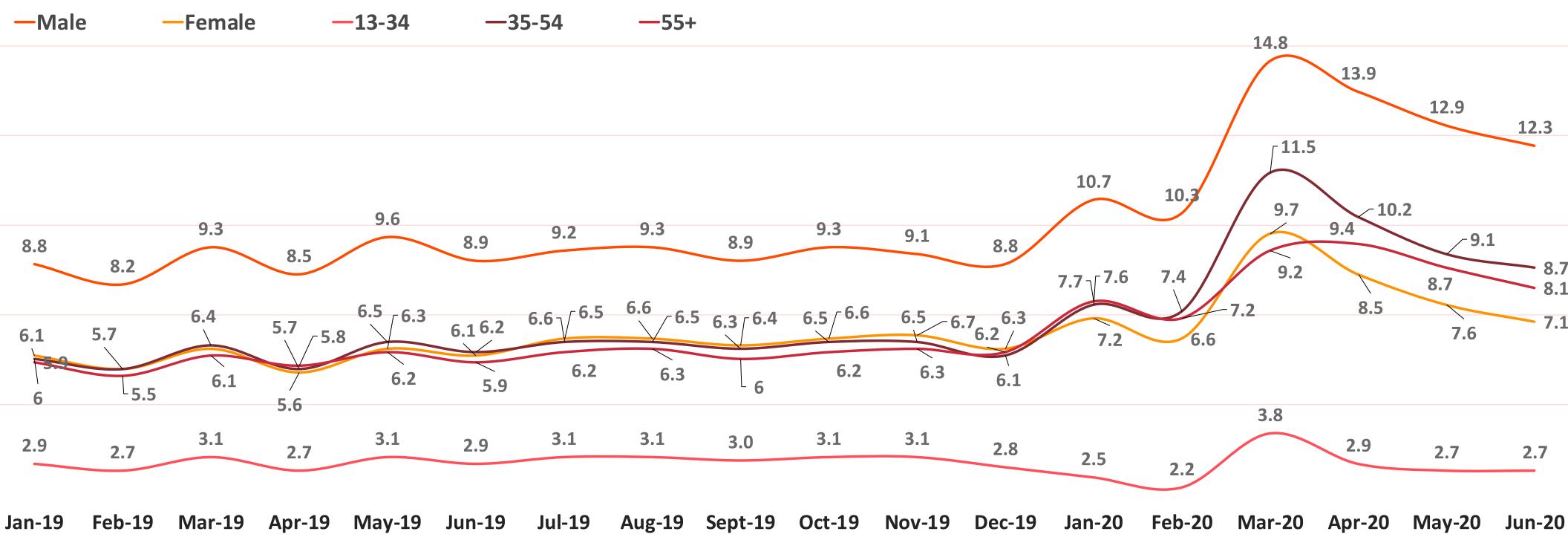


Digital news brands: time spent by demographic

17.9 -Male -Female -13-34 -35-54 15.3 12.6 9.6 10.0 9.3 9.3 9.2 8.9 8.8 8.2 **6.16.2 6.6** √ **6.5 6.6** ∧ / 6.5 6.3 7.3 6.4 5.7 **∕ 5.8** 5.7 6.1 6.2 6.2 6.1 5.9 5.5 4.7 5.6 3.1 3.1 3.1 2.9 2.9 2.7 2.7 2.0

Time Spent (Million Hours)

Time spent reading digital news brand sites by month by demographic (million hours)







REFERENCES.







Newspaper brands

Adelaide Advertiser	Fairfield City Champion
Albany Advertiser	Farm Weekly
Auburn Review	Financial Review
Augusta - Margaret River Mail	Flinders News
Augusta Margaret River Times	Fremantle Gazette
Bairnsdale Advertiser	Fremantle Herald
Ballina Shire Advocate	Fremantle/Cockburn Gazette
Bankstown-Canterbury Torch	Geelong Advertiser
Barossa & Light Herald	Geraldton Guardian
Bendigo Advertiser	Gippsland Times and Maffra Spectator
Blue Mountains Gazette	Great Lakes Advocate
Brimbank & North West Star Weekly	Hawkesbury Courier
Brisbane News	Hawkesbury Gazette
Broome Advertiser	Herald Sun
Bunbury Herald	Highlands Post
Bunbury Mail	Hunter Valley News
Busselton Dunsborough Times	Illawarra Mercury
Busselton-Dunsborough Mail	Jimboomba Times
Byron Shire News	Joondalup Times
Cairns Post	Kalgoorlie Miner
Cairns Weekend Post	Kiama Independent
Camden Haven Courier	Kingborough Chronicle
Campbelltown Macarthur/Wollondilly/Camden-Narellan Advertiser	Latrobe Valley Express
Canberra Chronicle	Lismore Echo
Canning Gazette	Liverpool City Champion
Central Western Daily	Maitland & Lower Hunter Star
Centralian Advocate	Mandurah Mail
Chronicle	Manning Great Lakes Extra
Coastal Times	Maribrynong & Hobsons Bay Star Weekly
Cockburn Gazette	Melton & Moorabool Star Weekly
Courier-Mail	Melville Gazette
Daily Examiner	Mercury
Daily Liberal And Macquarie Advocate	Mercury on Saturday
Daily Telegraph	Mid-coast Observer
Domain Review Bayside & Port Phillip	Midland Express
Domain Review Ivanhoe & Valley	Midstate Observer
Domain Review Melbourne Times	Midwest Times Incorporating Northern Guardian
Domain Review Moonee Valley	Mildura Weekly
Domain Review Stonnington & Boroondara	Mosman Daily
Dubbo Mailbox Shopper	My Weekly Preview
East Gippsland News	Newcastle Herald
Eastern Reporter	NewsMail
Echo	Noosa News
Echo News	North Queensland Register
Express	North Shore Times

NB Orange highlighted represent National & Metro brands (excl TAS, ACT * NT)

In some instances both the M-F versions and the Sat/Sun versions are displayed as if they are separate brands. The list may also include some brands that have recently ceased in Print – some of which continue in a digital only format. List does not include news.com.au, BrisbaneTimes .com.au or WAtoday.com.au

North West Telegraph	The Age
Northern Argus	The Area News
Northern Daily Leader	The Armidale Express Extra
Northern Star	The Australian
Northern Star Weekly	The Baw Baw Shire and West Gippsland Trader
Northern Territory News	The Bellingen Shire Courier-Sun
Observer	The Border Mail
Perth Voice	The Burdekin Advocate
Pilbara News	The Canberra Times
Port Lincoln Times	The Coffs Coast Advocate
Port Macquarie News	The Courier
Port Stephens Examiner	The Daily Advertiser
Post Group	The Examiner
Redland City Bulletin	The Extra
Riverine Herald	The Land
Saturday Advertiser	The Leader
Shepparton News	The Maitland Mercury
Sound Telegraph	The North Central Review
South Gippsland Sentinel-Times	The Saturday Paper
South Western Times	The Senior
Southern Gazette	The Standard
St George & Sutherland Shire Leader	The Star
Stirling Times	The Tablelander
Stock & Land	The Times
Stock Journal	The Weekend Star
Sunbury & Macedon Ranges Star Weekly	The Weekly Advertiser
Sunday Age	The Weekly Times
Sunday Canberra Times	Townsville Bulletin
Sunday Examiner	Tweed Daily News
Sunday Herald Sun	Tweed Daily News: Community Edition
Sunday Mail	Wangaratta Chronicle
Sunday Tasmanian	Wanneroo Times
Sunday Telegraph	Warragul & Drouin Gazette
Sunday Territorian	Weekend Australian
Sunday Times	Weekend Bulletin
Sun-Herald	Weekend Gold Coast Bulletin
Sunraysia Daily	Wentworth Courier
Sunraysia Life	West Australian
Surf Coast Times	West Australian Saturday
Sydney Morning Herald	Western Advocate
Tamworth Times	Western Suburbs Weekly
The Advertiser	Western Weekender
The Advertiser incorporating the Lake Times	Whyalla News
The Adviser	Wimmera Mail-Times
The Advocate	





Digital brands: basket for reporting of time spent reading and page views (DCR)

Adelaidenow	
The Age	
The Australian	
Australian Community Media Network	
The Australian Financial Review	
The Brisbane Times	
Cairns Post	
Chronicle	
Community News	
Courier Mail	
Daily Mercury	

Daily Telegraph	Property
Domain Media Group	Queensland Times
Escape	Realcommercial
Fraser Coast Chronicle	Sunshine Coast Daily
Gold Coast Bulletin	The Sydney Morning Herald
Herald Sun	Townsville Bulletin
Mercury	WAtoday
News	Weeklytimesnow
Newsmail	West Australian
Northern Star	
NT News	





.





