

Monday, 17 September 2018

Nine Network (+ Stan) will close gap on Seven Network

Nine Entertainment’s merger with Fairfax Media will bring together two of Australia’s leading media companies when completed. Combining the extensive broadcasting assets of the Nine Network with the valuable print media assets of Fairfax Media is a new combination in Australian media which is facing significant disruption with the array of choice available from digital competitors such as Netflix, Amazon, YouTube and others.

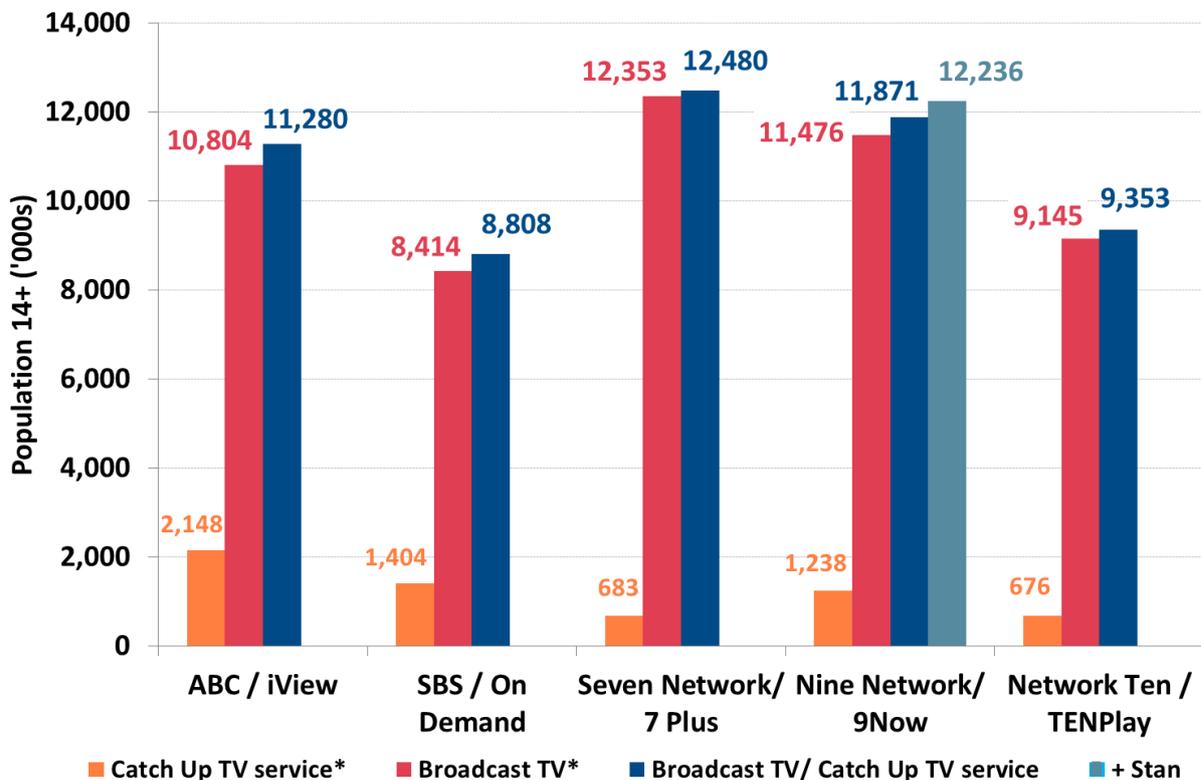
The combined Nine Entertainment-Fairfax Media will also be a stronger competitor to traditional broadcast rivals including the Seven Network and the CBS owned Network Ten as Australians are increasingly supplementing their consumption of Broadcast TV with the increasing use of ‘Catch Up’ TV services available via websites and apps.

The Seven Network is Australia’s most watched major broadcaster across different platforms with nearly 12.5 million Australians watching it in an average week. This compares to just under 11.9 million watching the Nine Network and almost 11.3 million who watch the ABC.

The Nine Entertainment-Fairfax Media merger would also bring Subscription Video On Demand (SVOD) service Stan under the control of the new entity. Stan was launched as a 50:50 joint venture between Nine and Fairfax three years ago.

Stan is watched by over 2 million Australians in an average four weeks – [see a detailed release on Pay TV/SVOD viewership here](#). The inclusion of a fully owned Stan as part of the Nine Network will boost the combined viewership of Nine Entertainment platforms to over 12.2 million – within reach of market leader the Seven Network.

Australians watching FTA TV Networks/Catch Up TV Services – 12 months to June 2018



Source: Roy Morgan Single Source, July 2017 – June 2018, n=50,035 Australians aged 14+. *Catch Up TV = Visitation to Catch Up TV website or Use of a Catch Up TV app in an average 7 days, *Broadcast TV = Viewing of FTA Network in an average 7 days. Broadcast TV/Catch Up TV service = Any of the above.

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Catch Up TV viewership led by ABC iView, SBS On Demand and 9Now

Viewership of 'Catch Up' TV is still only a fraction of traditional TV viewership but these services continue to grow in popularity as their usage becomes more widespread in the community.

ABC iView is the most popular Catch Up TV service for any of the five major broadcasters. It is watched by over 2.1 million Australians in an average week – a viewing audience more than 50% higher than any of the four other broadcasters Catch Up TV services. The viewing audience of ABC iView is equivalent to 20% of ABC's broadcast TV audience which is clearly the highest rate of the five major broadcasters.

SBS On Demand is the most popular Catch Up TV service among the four leading commercial broadcasters watched by over 1.4 million Australians in an average week. It is closely followed by 9Now watched by over 1.2 million Australians.

Michele Levine, CEO Roy Morgan, says Nine Entertainment's merger with Fairfax Media brings together two of Australia's leading media companies with strengths in broadcast television as well as valuable print media assets around Australia:

"The merger between Nine Entertainment and Fairfax Media will continue the evolution of Australia's media landscape combining one of Australia's leading broadcasters with a leading print media company.

"The merger also brings SVOD service Stan under the same roof after launching as a 50:50 joint venture between Nine and Fairfax over three years ago. A recent [Roy Morgan analysis of Pay TV/SVOD services](#) showed viewership of Stan now exceeds 2 million Australians in an average month performing strongly alongside key rivals including market leader Netflix, and Pay TV providers such as Foxtel and Fetch.

"The combination of the Nine Network and Stan is now watched by over 12.2 million Australians in an average week across all platforms including traditional TV as well as Catch Up. This audience reach would put the combined entity within striking distance of the Seven Network's viewership of nearly 12.5 million Australians.

"Although some have expressed concerns about the potential lessening of competition this merger may bring, the proliferation of competing Pay TV and SVOD services such as Netflix, Amazon Prime, YouTube Premium, Fetch and others, suggests competition in the viewing space is intensifying rather than reducing.

"To learn more about the consumers who flock to new technological innovations led by early adopters and closely followed by the professional technology mainstream and younger digital natives don't hesitate to contact Roy Morgan for further information."

[Click here](#) to view profiles of users of Pay TV services including Foxtel, Netflix, Stan, YouTube Premium, Fetch, Amazon Prime Video and others.

Contact Roy Morgan to learn more about Roy Morgan's Pay TV and Subscription Video on Demand research or [Technology Adoption Segments](#).

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Related research findings

Browse our Online Store for an extensive range of profiles on Foxtel, Netflix, Stan, YouTube Premium, Fetch, Amazon Prime Video and others.

Compiled with data from Roy Morgan's Single Source survey (the largest of its kind in the world, with 50,000 respondents p.a), these ready-made profiles provide a broad understanding of the target.

About Roy Morgan

Roy Morgan is the largest independent Australian research company, with offices in each state of Australia, as well as in the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan has over 75 years' experience in collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
50,000	±0.4	±0.4	±0.3	±0.2

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