

**WHY ADVERTISE ON TV?**

**100%**  
**accountable**

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**OzTAM and RegionalTAM** are the official sources of television audience measurement (TAM) in Australia.

**365 days each year** – for more than 100 channels (free-to-air and subscription) across dozens of demographic variables.

**SCA**

**oztam**  
measuring audiences



2017

**Regional TAM panel  
Increased by 50%**

**3,198 homes now on the panel**

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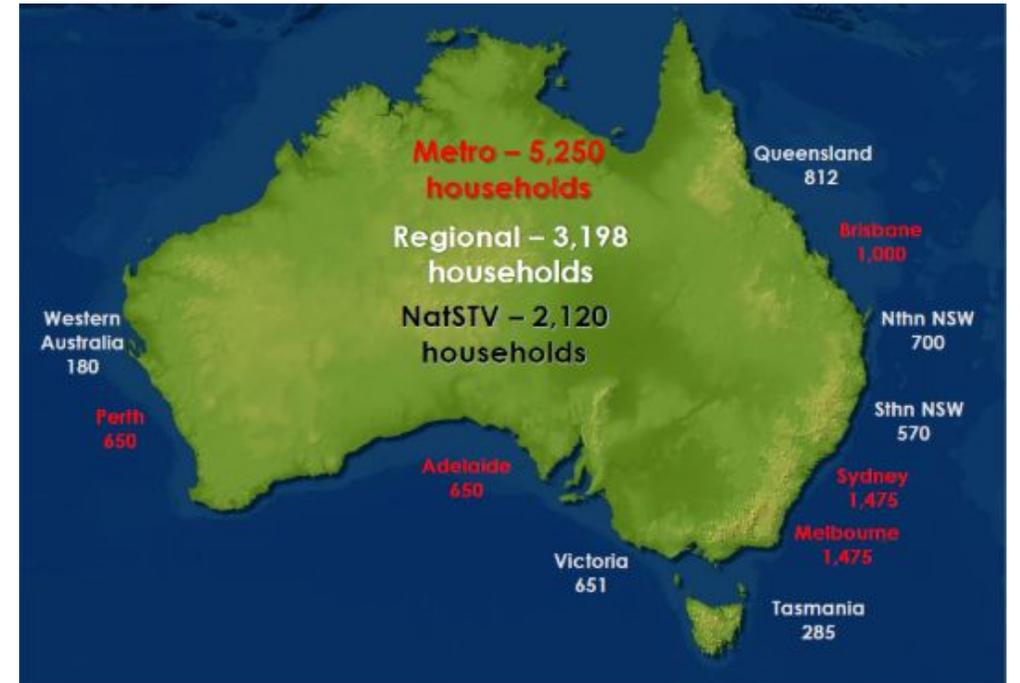
# Australia is the gold standard when it comes to TV ratings

Compared to the rest of the world, Australia has the largest FTA panel relative to their population.

This means Australia has the most robust sample when it comes to TV ratings, making Australia the gold standard around the world when it comes to TV ratings.

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Population: 25 Million  
FTA Panel: 8,448 households  
% of Population: 0.000338%

How does Australia compare to the rest of the world?

## United States of America

Population: 328 Million  
FTA Panel: 41,000 households  
% of Population: 0.000125%

## United Kingdom

Population: 67 Million  
FTA Panel: 5,266 households  
% of Population: 0.00007859%

## New Zealand

Population: 4.8 Million  
FTA Panel: 900 households  
% of Population: 0.000188%

## France

Population: 67 Million  
FTA Panel: 5,000 households  
% of Population: 0.00007462%

# Virtual Australia (VOZ) – Televisionary Measurement

Australian TV viewing patterns are changing, thanks to the explosion in content, platform and device choice. The average Australian home now has 1.8 TV sets and 6.6 screens in total, and people are using all of them to watch television throughout the day – inside and outside the home.

To capture TV viewing across all screens, OzTAM, Regional TAM and Nielsen are building VOZ, with initial VOZ data to be available in Q1 2020.

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oztam  
measuring audiences

REGIONAL  
TAM  
TELEVISION AUDIENCE  
MEASUREMENT

VOZ  
televisionary measurement

## What is VOZ?

Virtual Australia, or 'VOZ' is the foundation of Australia's new '**Total TV**' reporting standard.

VOZ brings together broadcast viewing on TV sets and connected devices (smart TVs, desktop/laptop computers, tablets and smartphones) to provide all-screen, cross-platform planning and reporting for Australia's television industry.

It will deliver step change in the way Australian television is measured and evaluated.

## What will VOZ do?

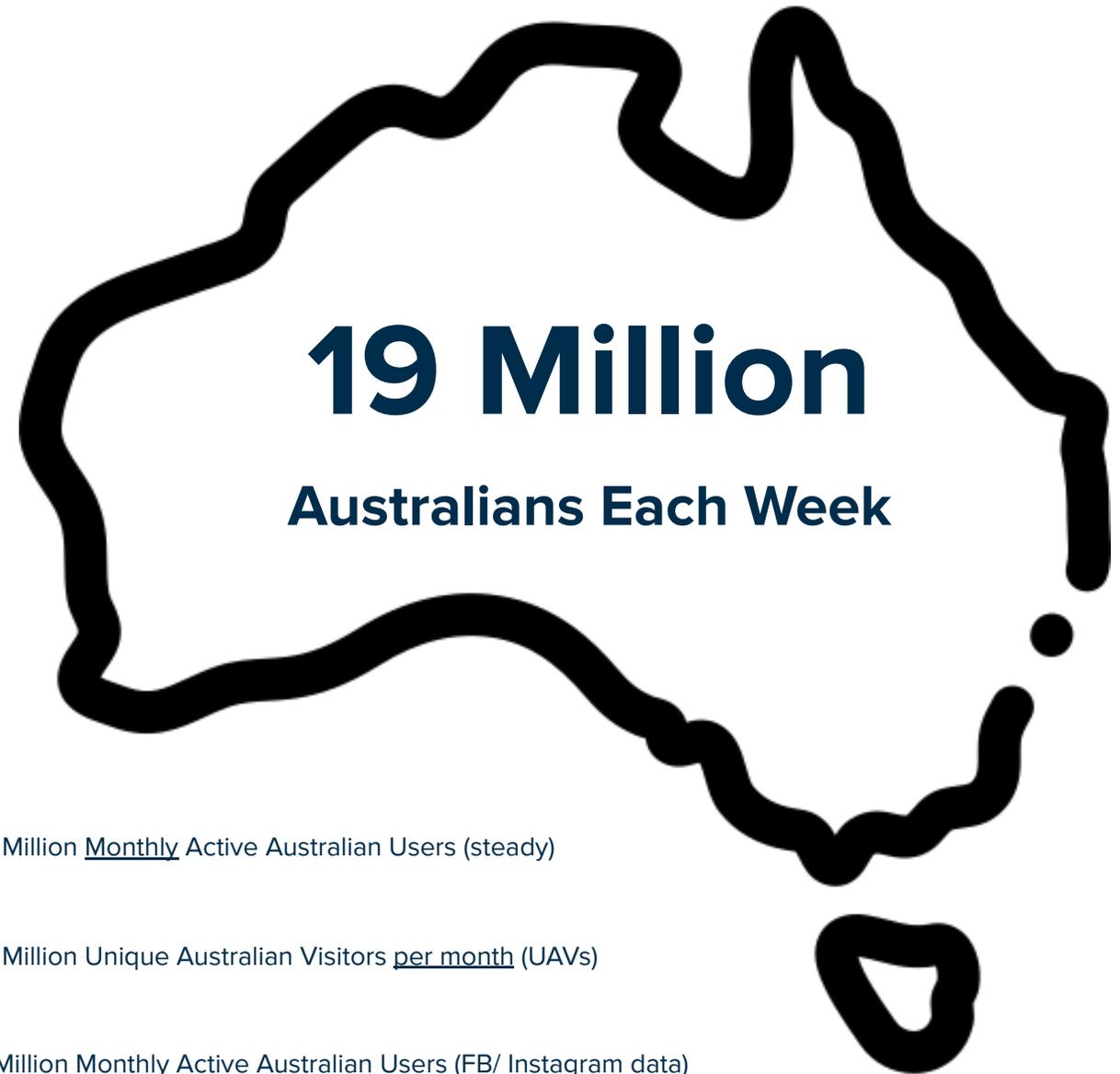
- A national view
- Total TV reporting
- Cross screen campaign planning and evaluation
- Advanced audience segmentation
- VOZ in use

# TV has unbeatable scale and reach

Mass media is critical for the success of your brand and if you want mass, look no further than TV.

With 19 million Australians tuning in each week, TV's scale is unbeatable.

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15 Million Monthly Active Australian Users (steady)



15 Million Unique Australian Visitors per month (UAVs)



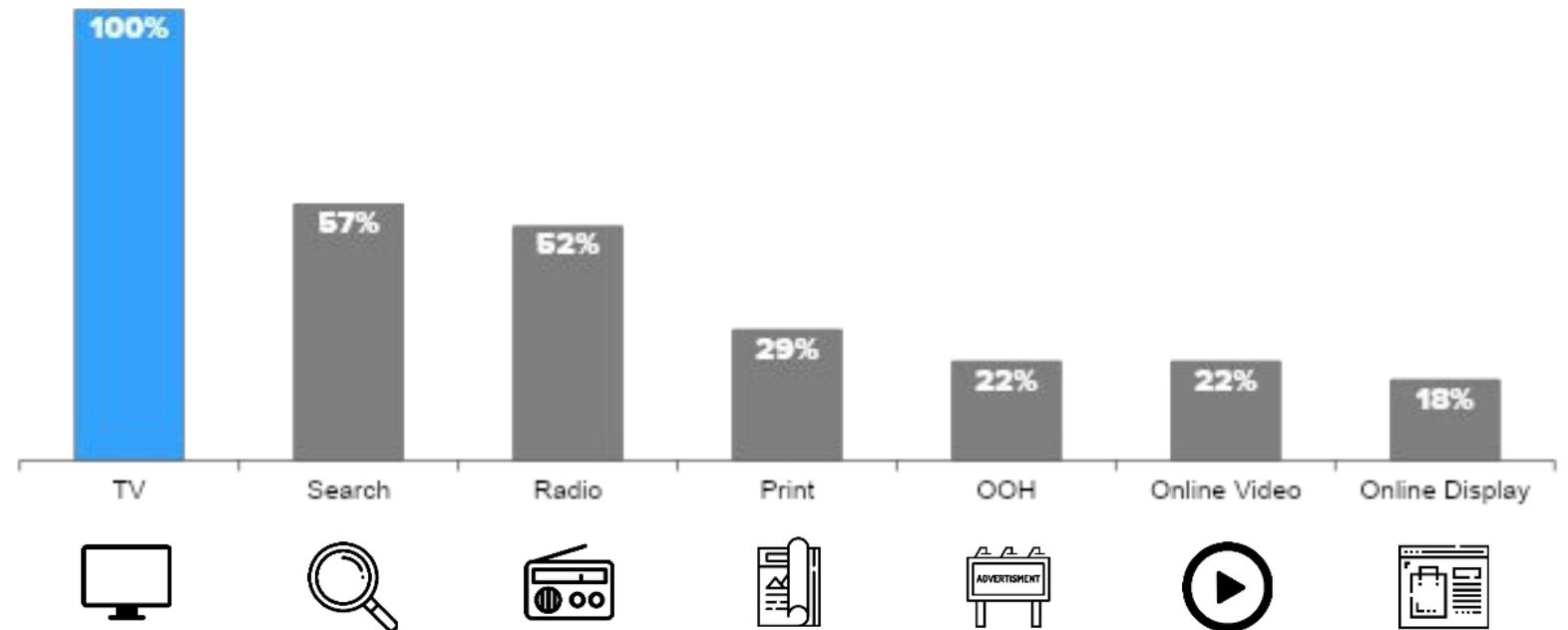
9 Million Monthly Active Australian Users (FB/ Instagram data)

# TV achieves the best ROI

Based on the industry report Payback Australia which examined 4 categories and 21 brands with a total spend of \$500m+.

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## OVERALL EFFICIENCY: MEDIA CHANNEL ROIs INDEXED TO TV

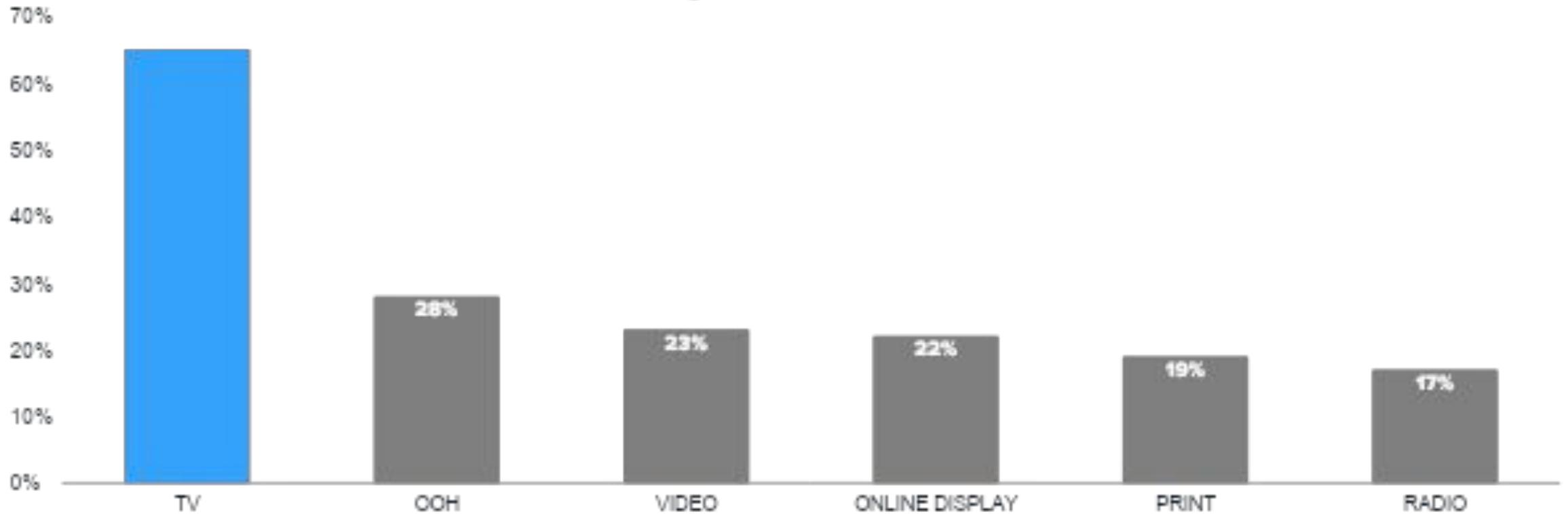


Source: Payback Australia 2017, ThinkTV

# TV impact lasts longer

TV retains approximately **65%** of its impact from the previous week. Results also suggest recall of TV ads are stronger and last longer than other media

Average Retention Rates





# Australian TV is brand safe

With the unprecedented increase in ways to consume video content these days, there is a reason why TV is still Australia's most trusted medium.

Thanks to high-quality professionally curated content, audiences and advertisers alike trust TV.

## So what is it that separates TV from the other platforms?

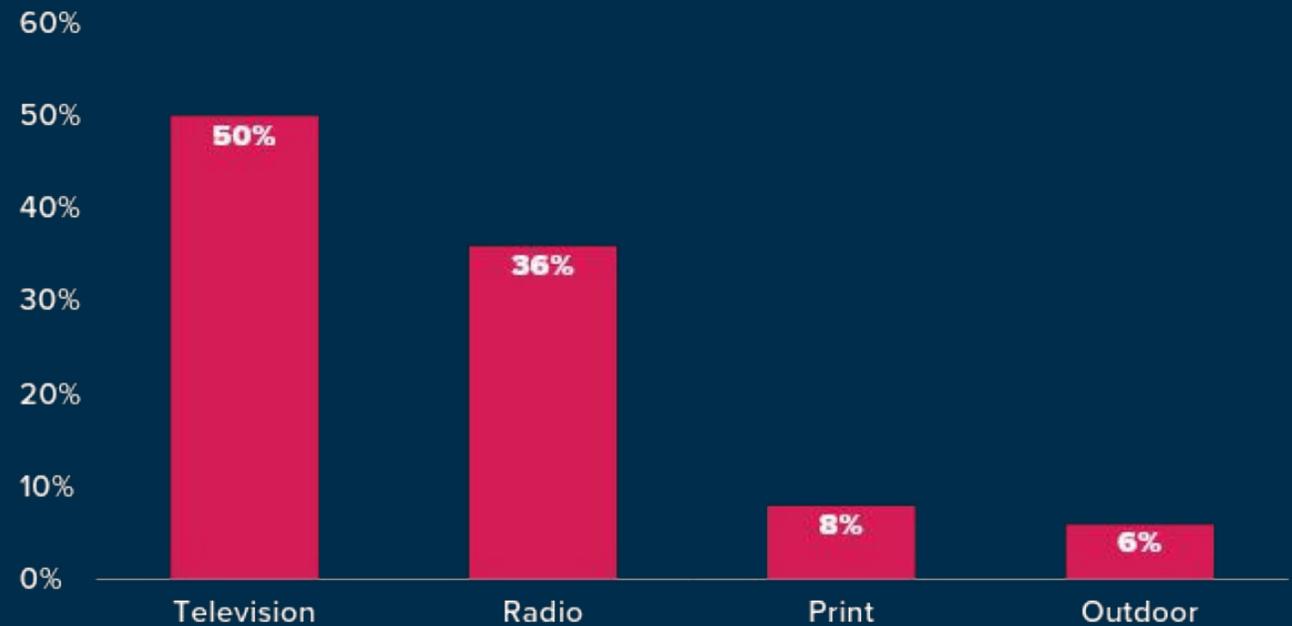
In a nutshell, TV uses human judgment supported by technology and not the other way around – creating a safe, monitored and managed environment. This means you can trust that your brand will always be in the right context.

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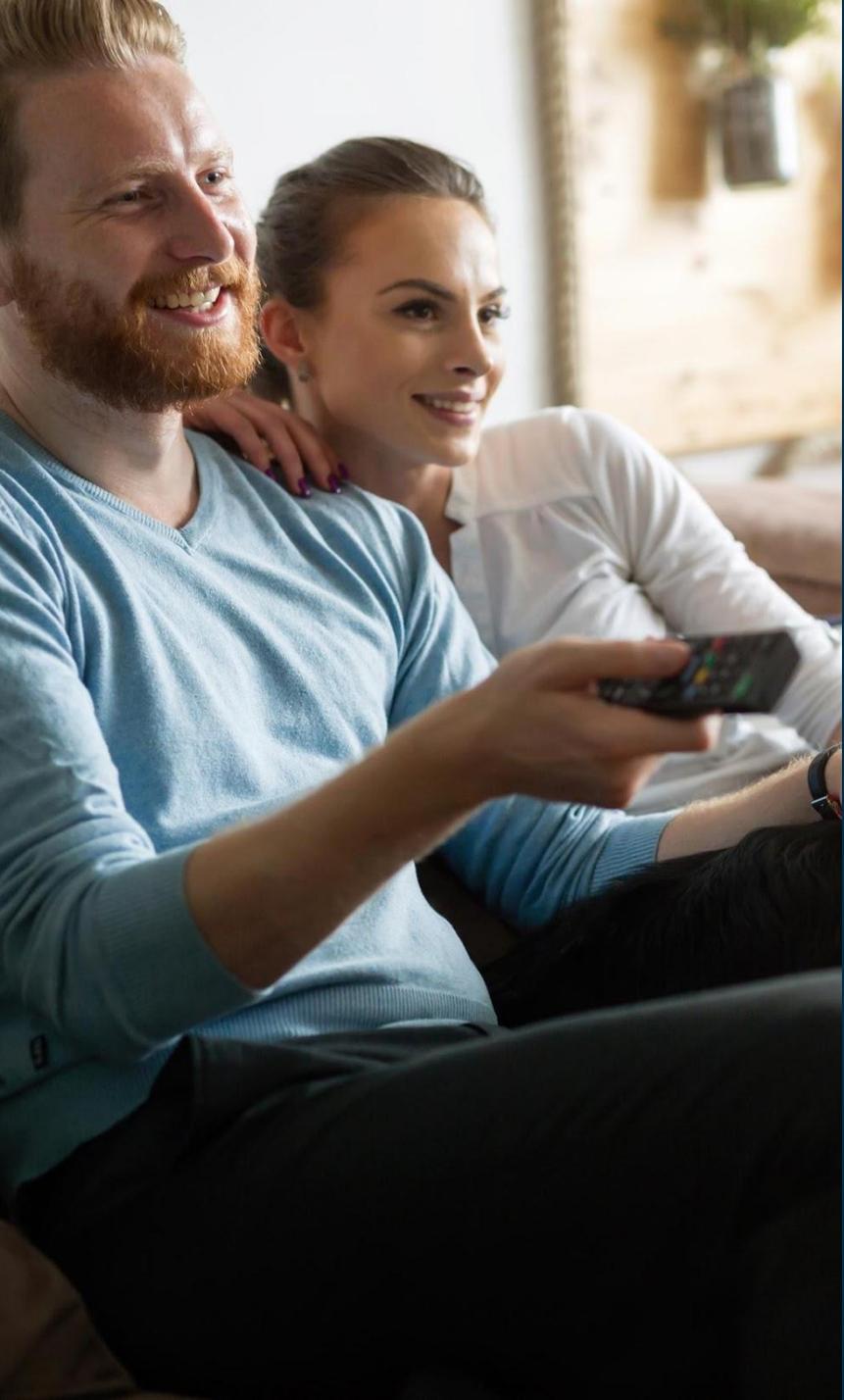


# TV Drives Branded Search

Television advertising has shown to prompt people to search for a brand name. As a result, TV can increase brand awareness, branded search and decrease reliance on paid search.

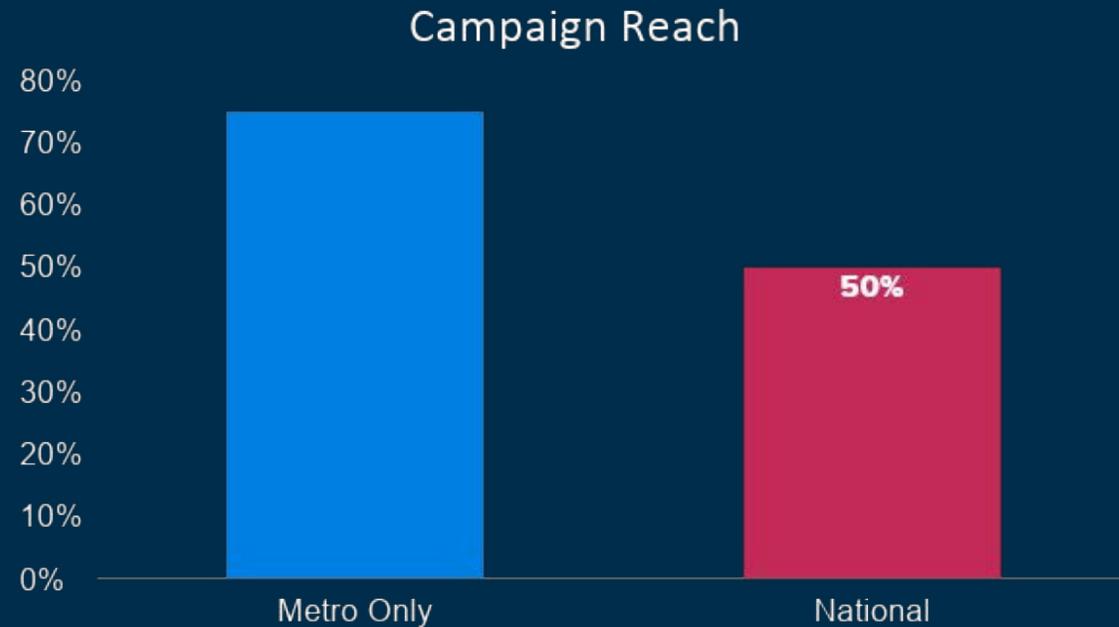


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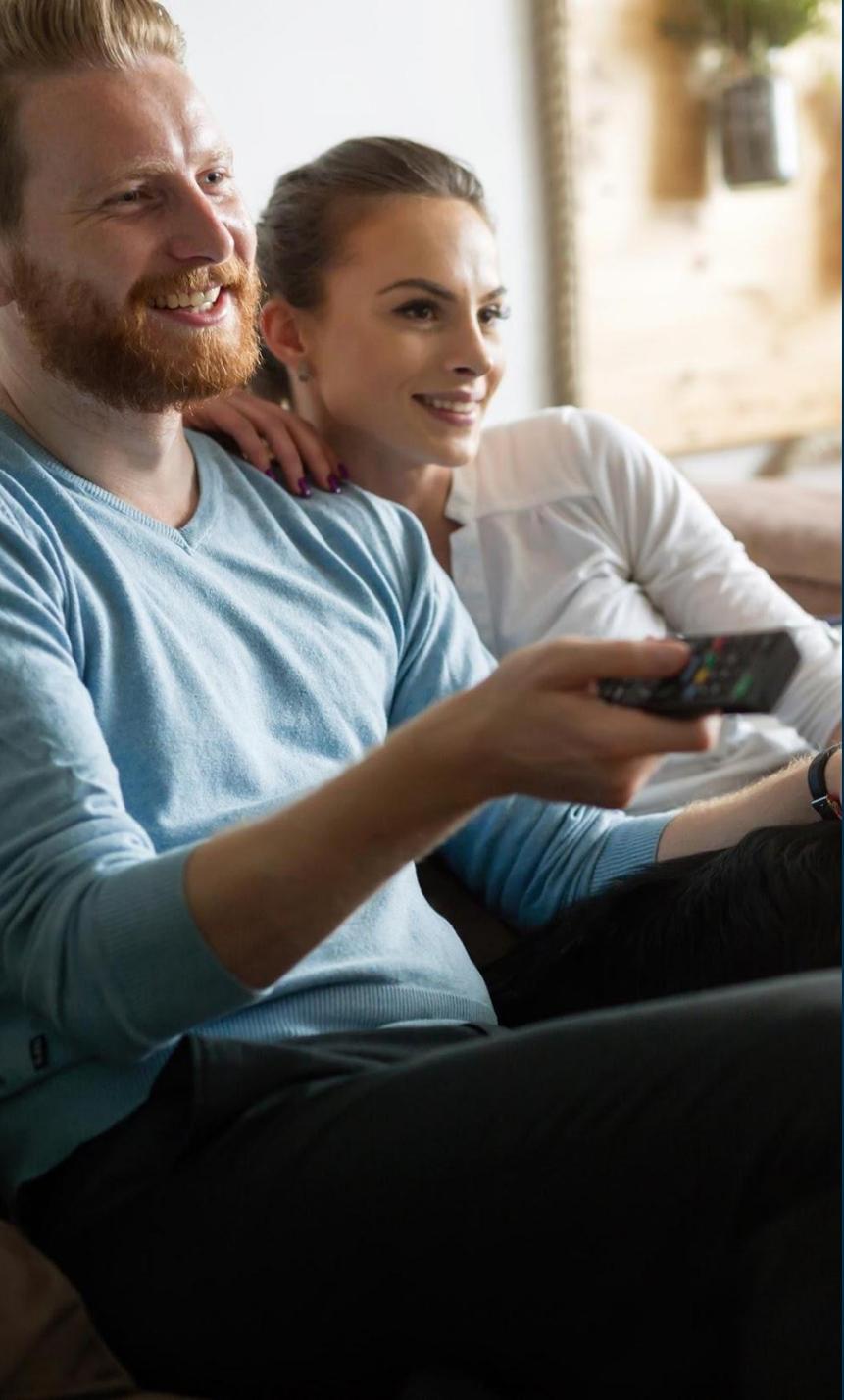


# How many Australians are you really reaching?

A metro only TV campaign with a 70% reach goal only reaches 50% of the national audience.

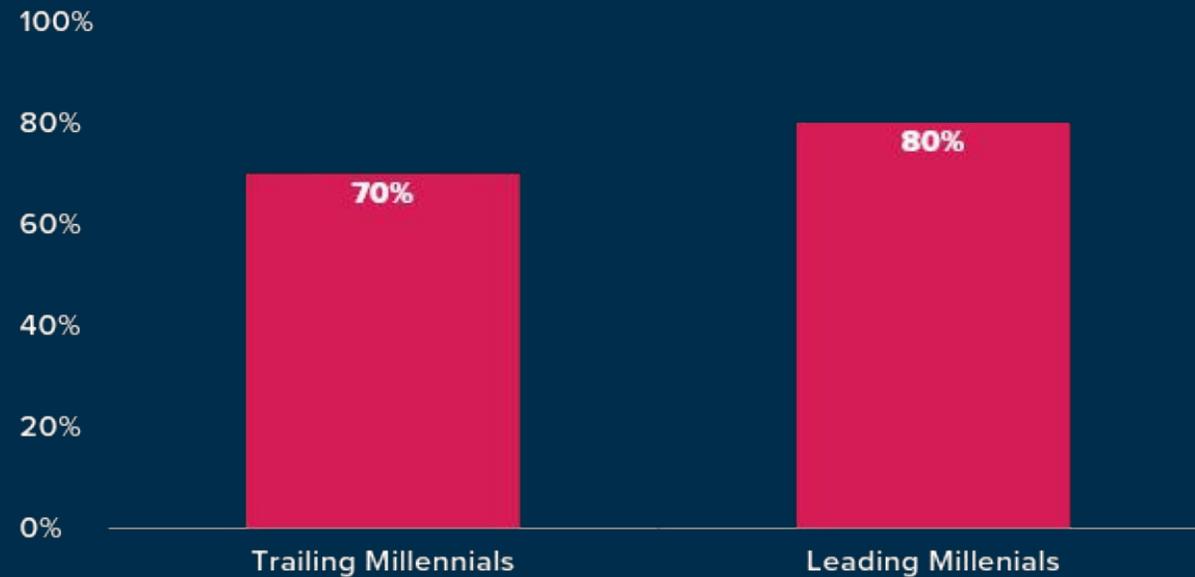


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# TV reaches millennials

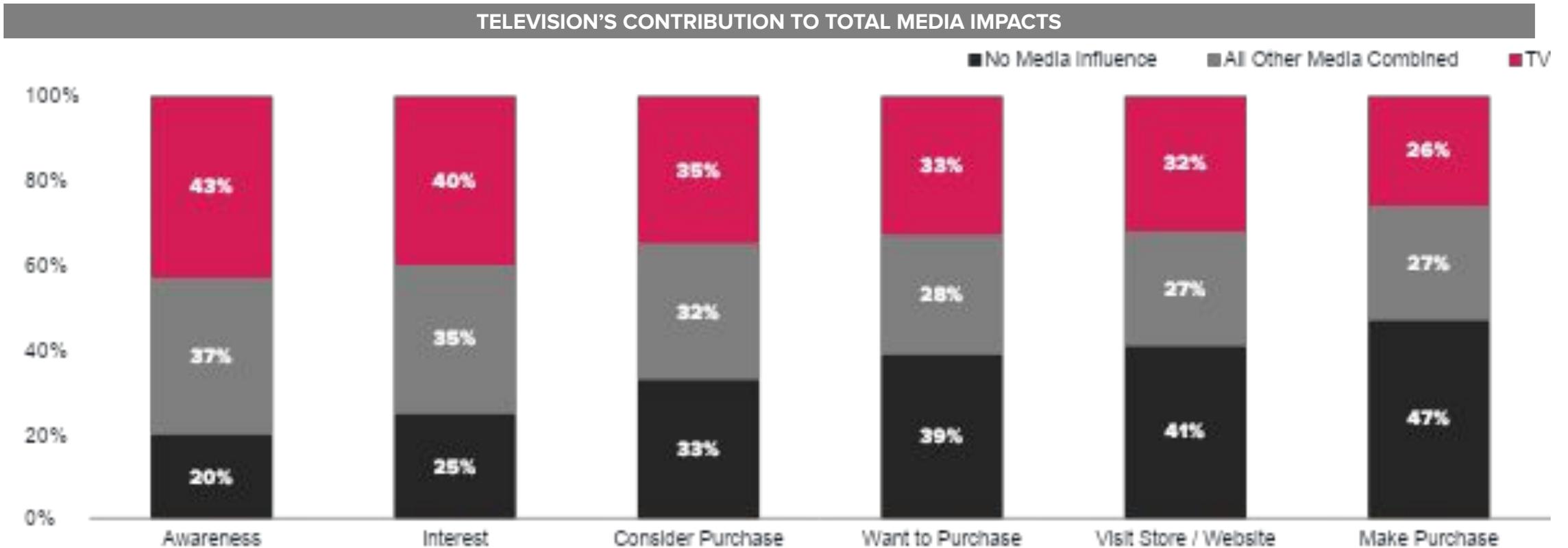
Television also reaches millennials – something other traditional mediums struggle to do. In Australia, nearly 3 in 4 Trailing Millennials and 4 in 5 Leading Millennials have watched free-to-air TV in the past 7 days.



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Source: Nielsen Clear Decisions, Survey 5 2019. National. Trailing Millennials P14-29, Leading Millennials P30-34. Summary Media: Any Free to Air TV P7D.

# TV INFLUENCES ALL STAGES ALONG THE PATH TO PURCHASE



In a study conducted by the social research centre Yankelovich, TV was found to influence all six stages of the consumer purchase path – from awareness right through to a consumer’s decision to purchase goods or services. Not only is it present right through all of these stages, but it is also the only single media to have the greatest influence on decisions made along the path, making it an invaluable medium to advertise with.

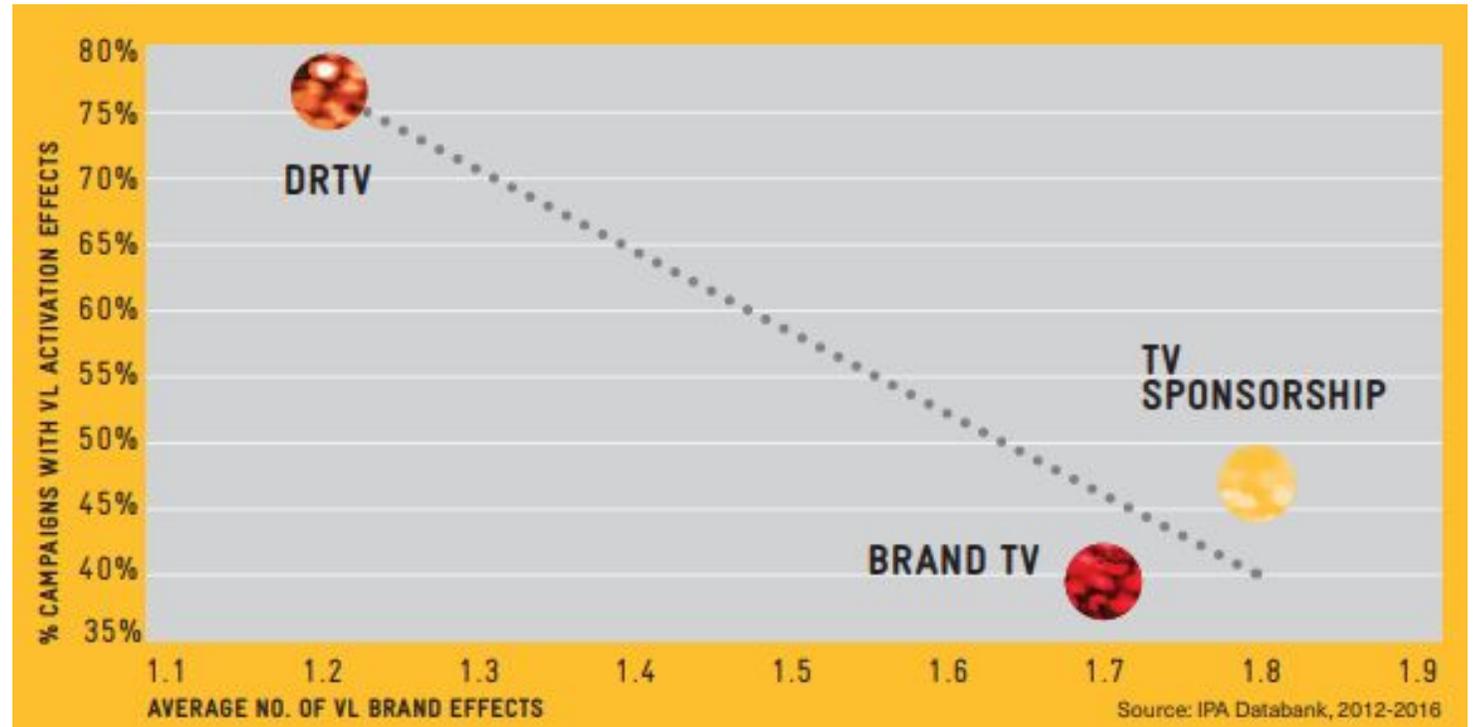


# TV can deliver both short and long-term success

According to Peter Field and Les Binet, short-term efforts need to be balanced with long-term brand building activities and few mediums can deliver on both like TV can.

Short-term, nearly 80% of Direct Response TV (DRTV) campaigns had very large activation effects, however, aren't the best for building brands in the long-term.

Long-term, brand TV campaigns had an average of 1.7 very large brand effects, making these campaigns and TV sponsorships much more effective at building brand equity.



Y-axis: % campaigns with **VERY LARGE** activation effects  
X-axis: Average number of **VERY LARGE** brand effects

DRTV: Direct Response Television

Source: [1] Media In Focus: Marketing Effectiveness In The Digital Era. Les Binet & Peter Field. June 2017. Page 47. [2] ThinkTV. Short & Long term success.

# TV can tell a story like few mediums can

TV has premium quality content, which provides high levels of viewer **engagement** and **attention** as well as level of receptivity and viewing time to allow for engaging, compelling storytelling.

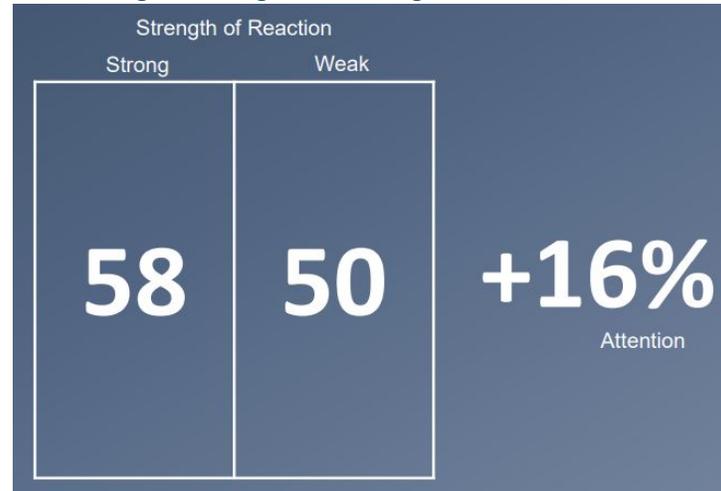
According to Professor Karen Nelson-Field's research in The Benchmark Series, ads which evoke strong emotional reactions gain more attention and ads that gain more attention generate **greater sales impacts**.



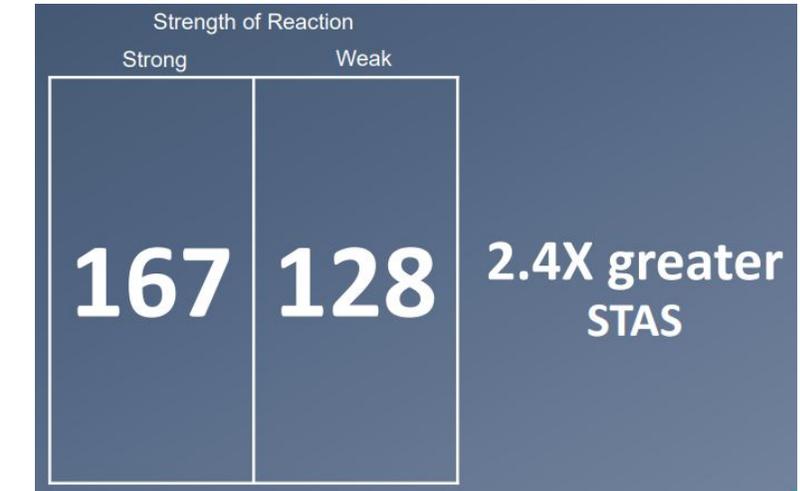
Emotion-Reaction Grid

Strong Reaction		Weak Reaction	
Positive Emotional Response	Negative Emotional Response	Positive Emotional Response	Negative Emotional Response
Hilarity	Disgust	Amusement	Discomfort
Inspiration	Sadness	Calmness	Boredom
Astonishment	Shock	Surprise	Irritation
Exhilaration	Anger	Happiness	Frustration

Ads that get strong reactions get more attention



Ads that get more attention generate greater sales impact



Source: ThinkTV. The Benchmark Series: Emotions and Advertising.

# TV is talked about

Through TV's ability to story tell, emotional connections can be made and subsequently leveraged to generate buzz and action.

In an example from 2016, Waleed Aly used the platform and Ten's premium content The Project to talk about the 'Milk Crisis' affecting dairy farmers.

Waleed delivered an emotionally compelling story about how dairy farmers can't compete with home-branded milk prices in major supermarkets.

As a result he urged viewers to support our dairy farmers buy buying brand-named milk and cheese.

What followed was an influx of social media activity in support of Waleed's initiative.

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## Waleed Aly wants you to buy Australian dairy in 'the greatest call to arms I have ever made'

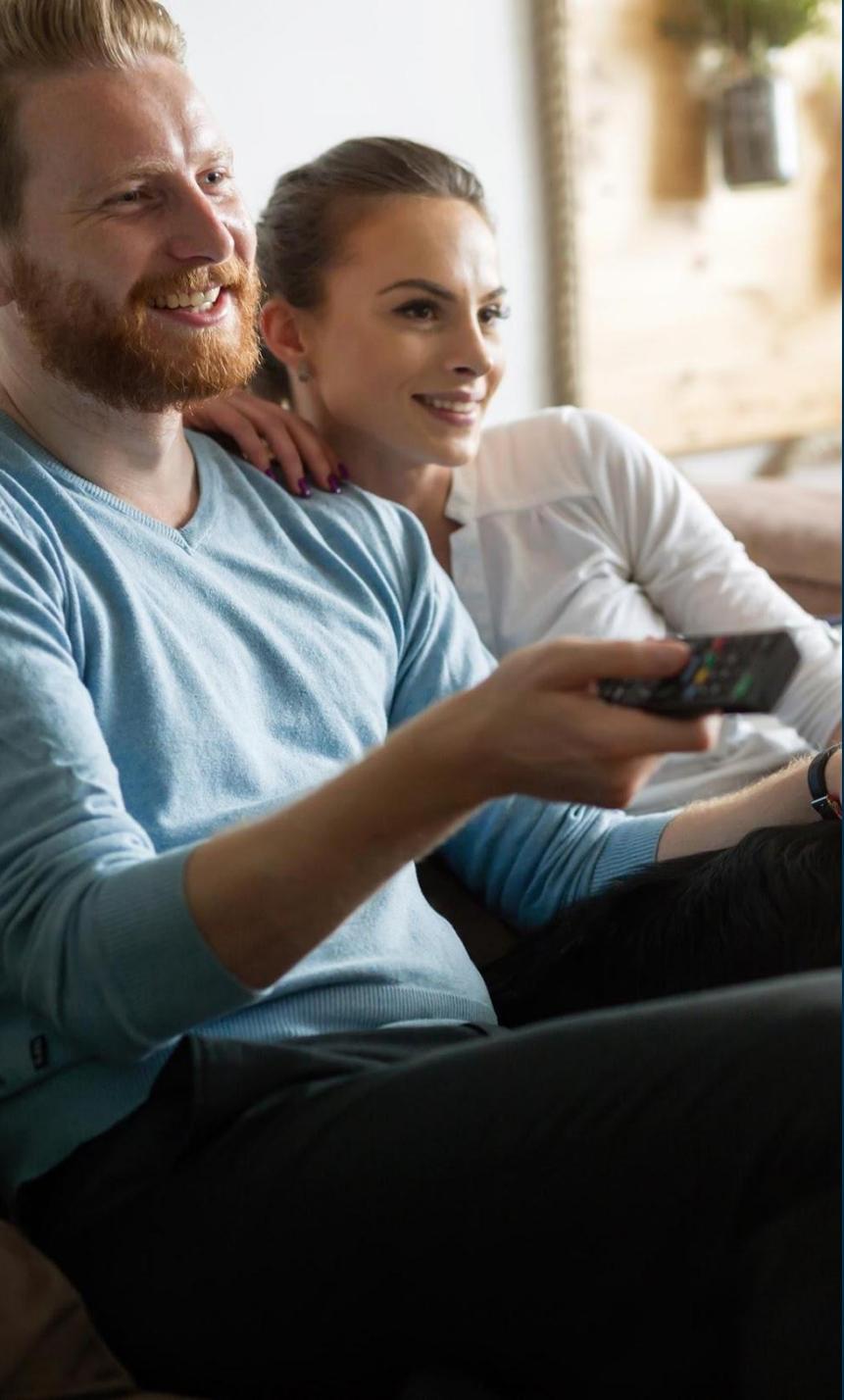


Waleed Aly has made a plea for shoppers to stump up a few cents more for Australian-made brand-name cheese and milk to help save farmers from financial ruin. Courtesy The Project, 6.30pm weekdays on Ten.

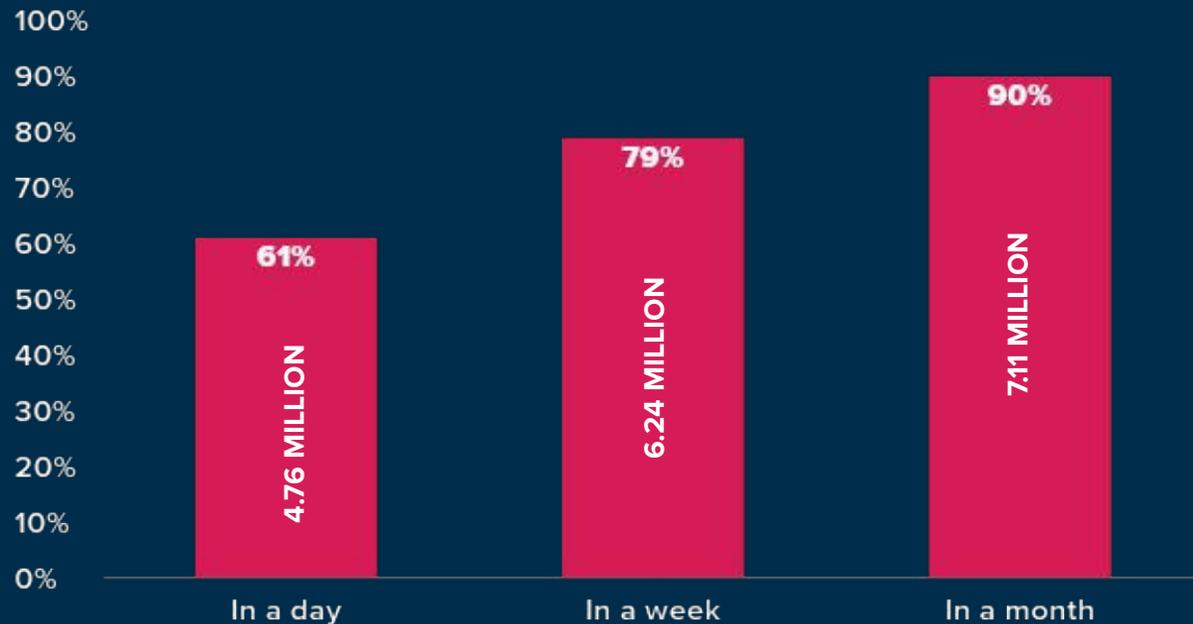
Source:

<https://www.smh.com.au/entertainment/waleed-aly-wants-you-to-buy-australian-dairy-in-the-greatest-call-to-arms-i-have-ever-made-20160517-cv9hh4.html>

**WHY ADVERTISE ON REGIONAL TV?**



# What proportion of regional Australians does TV reach?



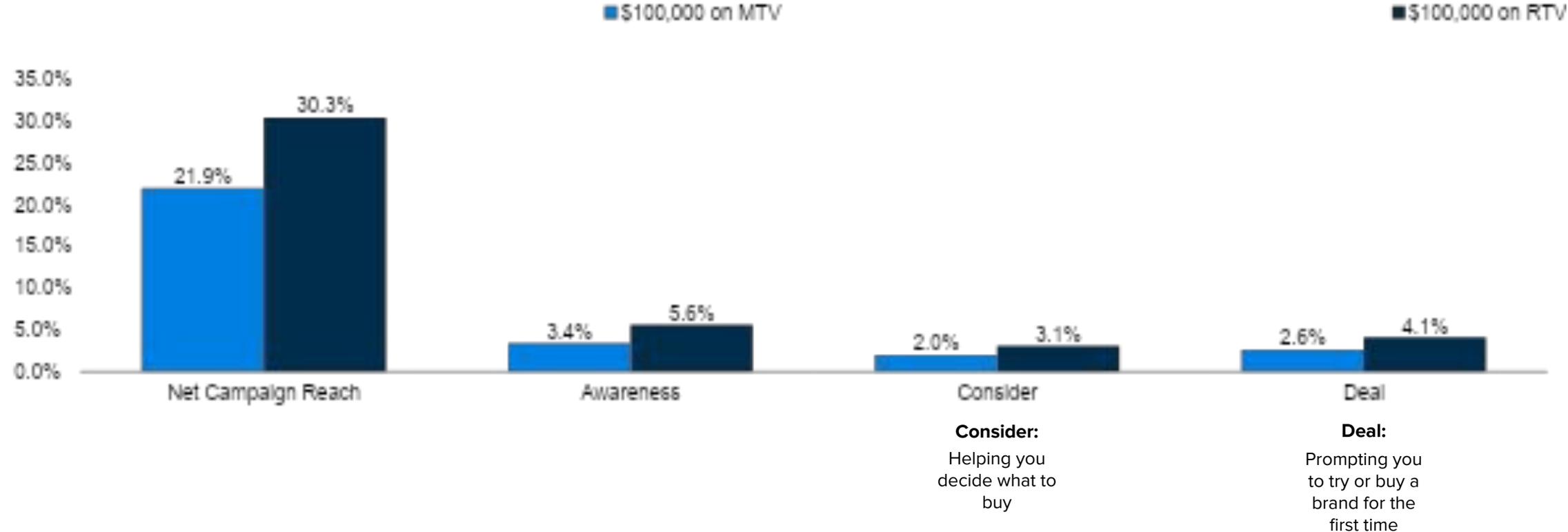
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Source: RegTAM Regional Agg, Mkts, Total Ppl, 1 minute reach Total TV, 1 Jan to 30 Jun 2019 includes live viewing and playback through the TV set at the time it is watched within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600.

# Regional TV gives your brand more bang for its buck!

\$100,000 on Regional TV will likely provide your brand with a higher campaign reach, awareness, consideration and deal compared to the same spend on Metro TV.

## NATIONAL: MTV vs RTV



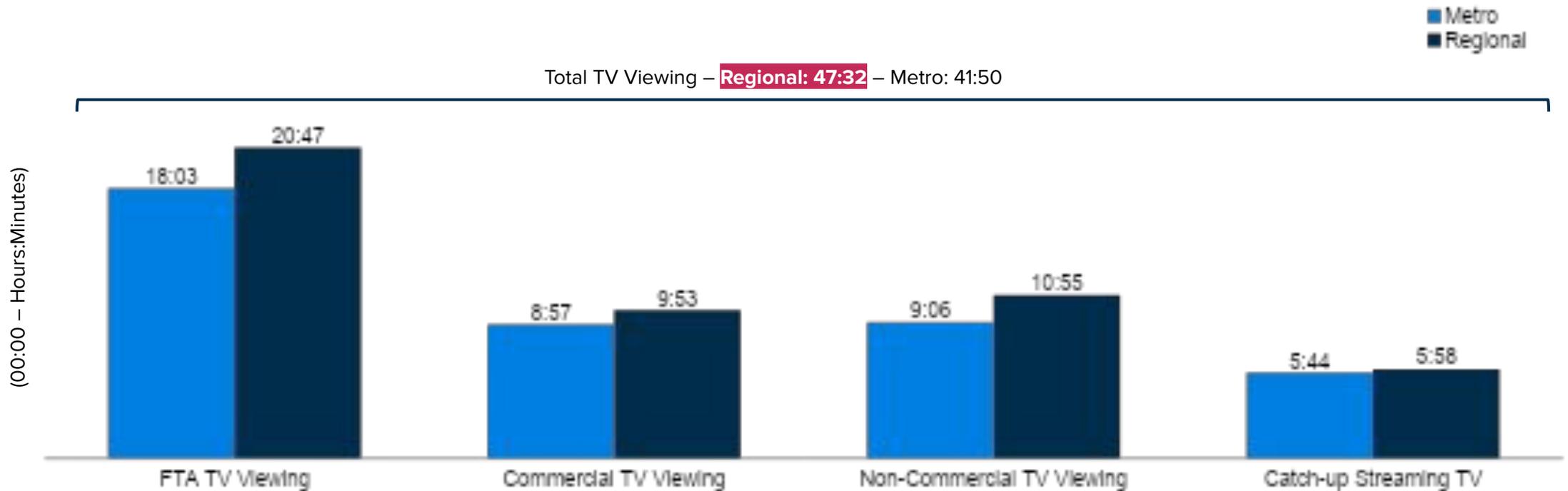
Source: Commspoint. Channels: TV Advertising. National. All People. MTV vs RTV. For more detail on Commspoint report please contact SCA Research.

# Boomtown watches more TV than their metro counterparts

## NATIONAL: MEDIA TIME SPENT (AVERAGE)

Metro v Regional

Boomtown residents spend on average 47 hours and 32 minutes watching TV a week. That's 5 hours and 42 minutes more per week than their metro counterparts!



# Regional TV offers a greater share of voice

## TV Advertising Spends FY-2019 to Date

Metro TV: ~\$1,008,677,000  
Regional TV: ~\$278,120,000

Budget: \$1,000,000

SOV Metro TV: 0.10%  
SOV Regional TV: **0.36%**

Source: [1] Nielsen Advviews. Expenditure by Media. All Categories. National. FY-2019 to date (7 Jul – 2 Nov). MTV & RTV. [2] Media In Focus: Marketing Effectiveness In The Digital Era. Les Binet & Peter Field. June 2017.

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**“Research showed that brands with a high share of voice relative to their size tended to grow, while those with low SOV tended to shrink.”**

Source: Binet and Field 2013

*And we know high share of voice relative to size tends to grow your brand...*





# Adding regional to a metro campaign increases reach for less

By allocating 25% of your metro campaign investment into Boomtown, total audience delivered will increase by +18% and CPM reduce by -18%

## METRO ONLY CAMPAIGN

\$1,000,000 = 33.3m impacts

## METRO & REGIONAL CAMPAIGN

\$750,000 metro = 25m impacts

\$250,000 regional = 14.3m impacts

Total audience = 39m **+18% more**

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# Regional TV adds incremental reach

Regional audiences add extra reach to a sponsorship for only 10%+ more investment



Metro TV reach	11,180,000
Boomtown TV reach	3,220,000
Total reach	14,400,000
Incremental national reach	<b>+22.4%</b>

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# **CASE STUDIES**

# REGIONAL TV CASE STUDY

## PRIVATE HEALTH INSURANCE | REGIONAL (4AGG MARKETS + TAS) TV SPOTS



### AWARENESS

Among respondents 55+, first to mind unprompted awareness increased by 18% when comparing those exposed to the campaign (30.9%) versus those not exposed (26.1%) to the campaign



### CONSIDERATION

Respondents 55+ were 108% more likely to consider signing up to the brand when comparing those exposed to the campaign (27%) versus those not exposed (13%) to the campaign



### BRAND STATEMENTS

There were increases up to 500% in association of the advertised brand statements when comparing those exposed to the campaign versus those not exposed to the campaign



### AD RECALL

50% of respondents 55+ recall at least one element of the campaign.

**+12% of respondents 55+ took some form of action as a result of seeing the campaign.**

# REGIONAL TV CASE STUDY

## ALCOHOL RETAILER | REGIONAL (4AGG MARKETS + TAS) TV SPOTS

\*Note: This brand is a market leader which already had strong awareness, consideration and perception going into the campaign.



### AWARENESS

Among respondents 25-54, first to mind unprompted awareness increased by 29% when comparing those exposed to the campaign (43.3%) versus those not exposed (33.7%) to the campaign



### CONSIDERATION

Respondents 25-54 were 10% more likely to consider purchasing from the brand when comparing those exposed to the campaign (75%) versus those not exposed (68%) to the campaign



### BRAND STATEMENTS

There was an average increase of 5% in association of the advertised brand statements when comparing those exposed to the campaign versus those not exposed to the campaign



### AD RECALL

50% of respondents 55+ recall at least one element of the campaign.

**Plus, 54% of respondents 25-54 took some form of action as a result of seeing the campaign.**