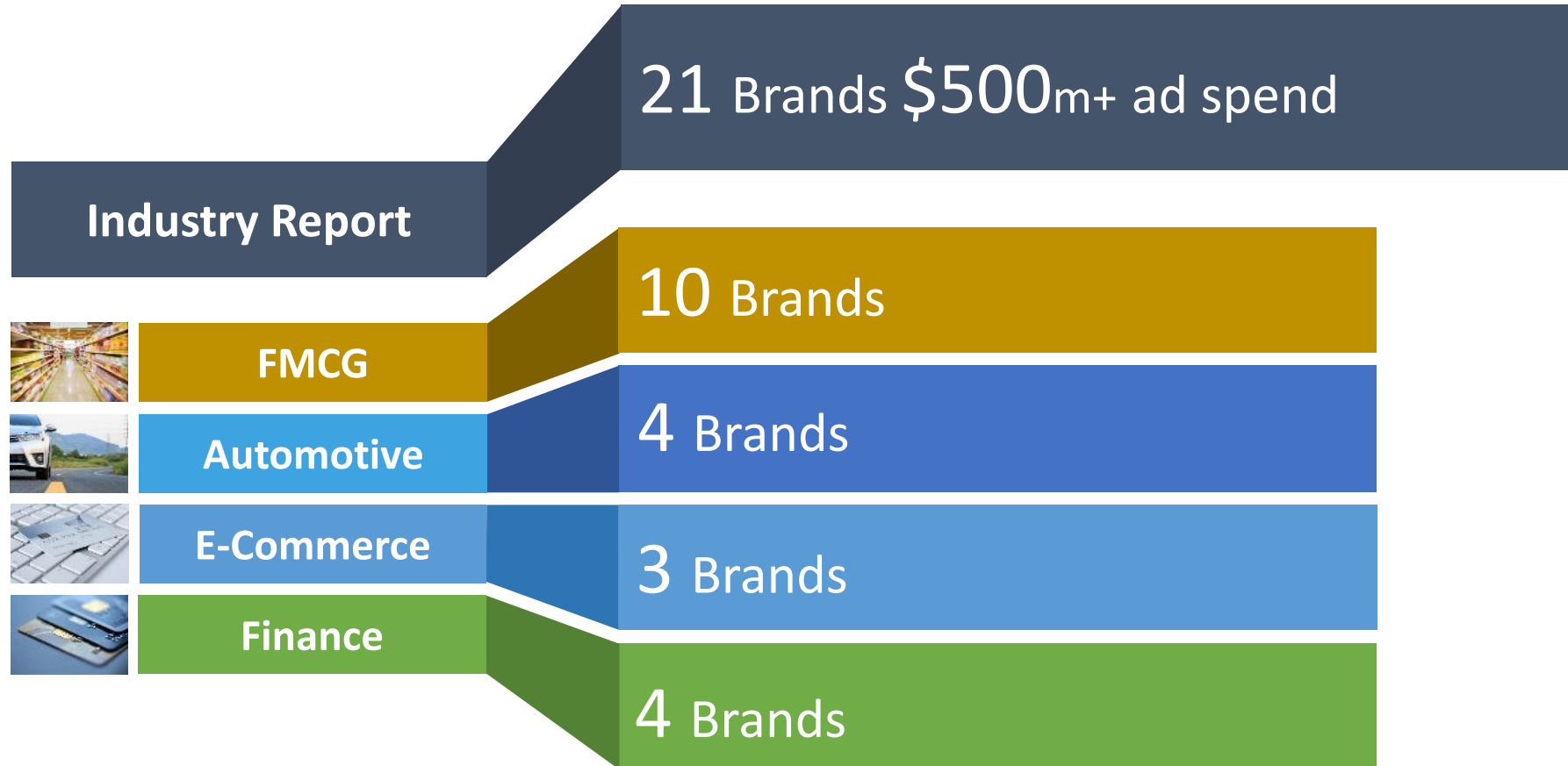




TV
DELIVERS

**“TV DRIVES
MORE REVENUE PER
\$ INVESTED THAN
OTHER CHANNELS”**

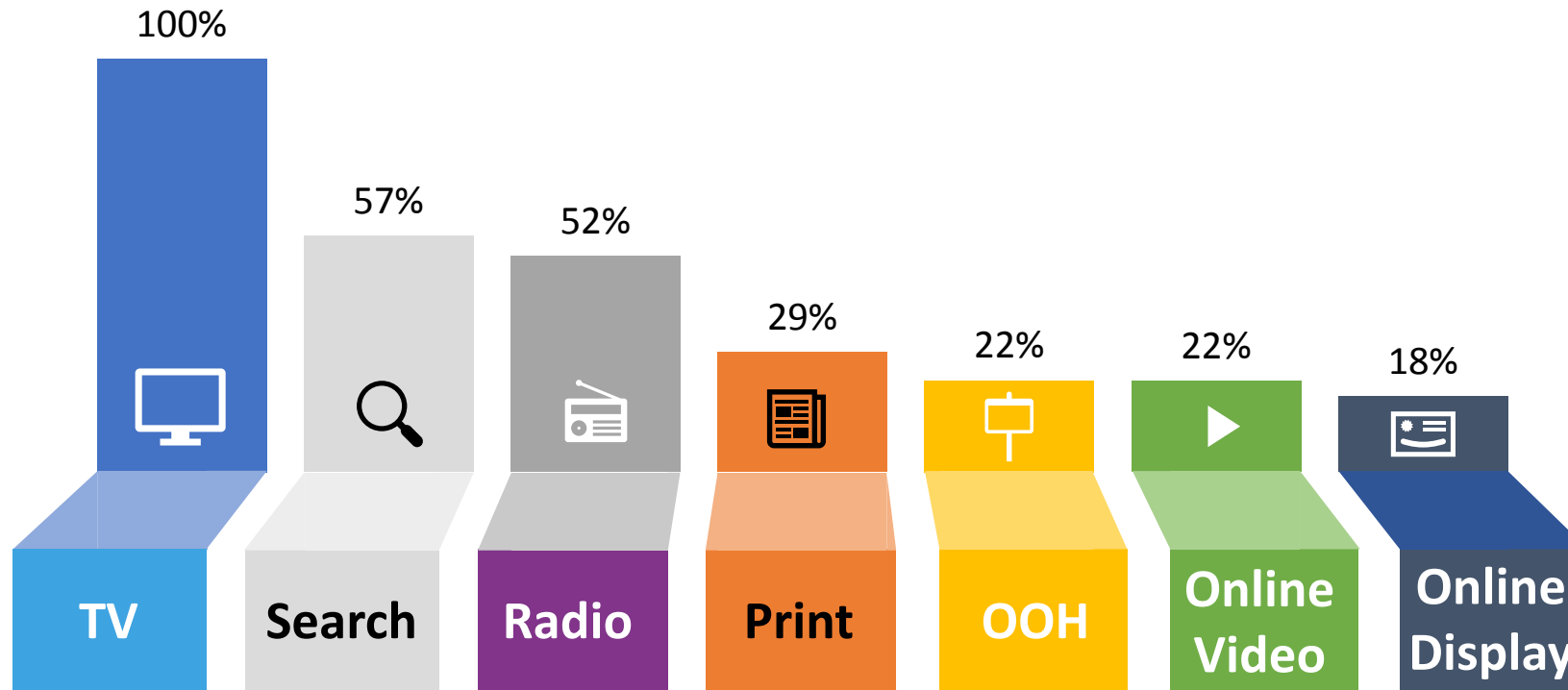
The Payback Study



Source: Payback Australia Study, Ebiquity

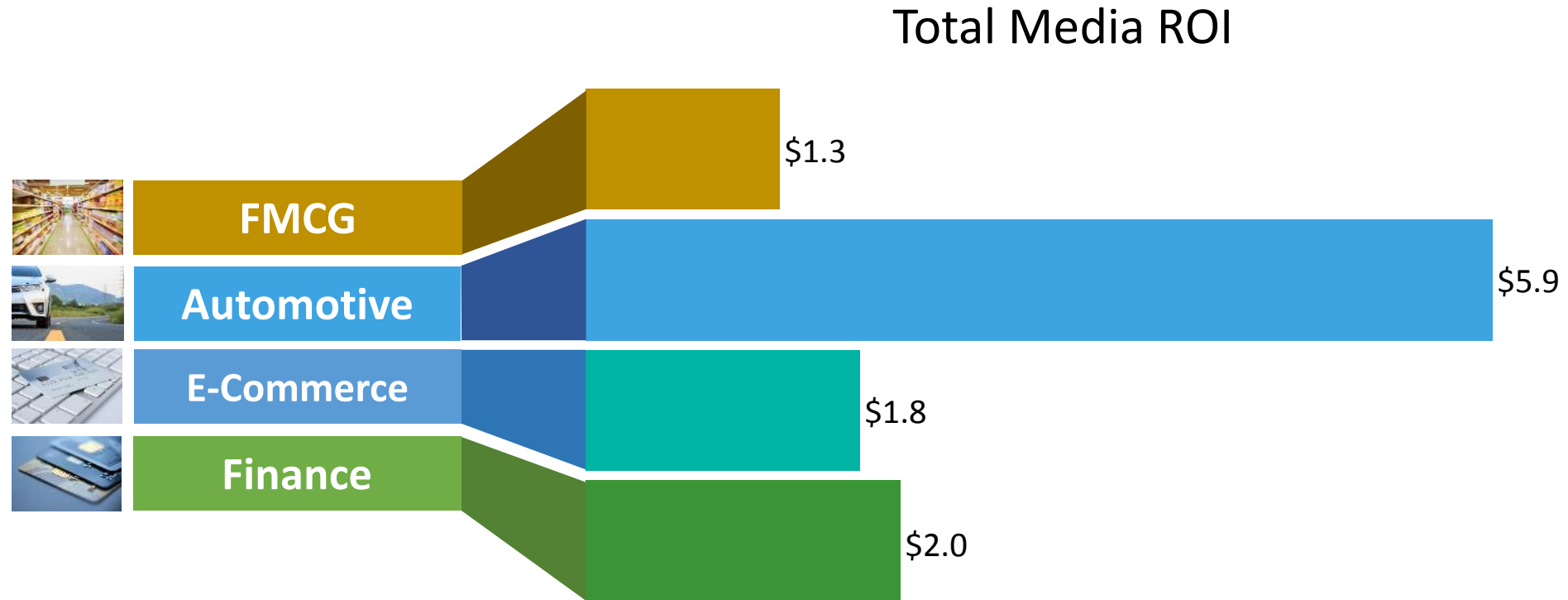
TV is the Most Efficient Channel

Overall Efficiency: Media Channel ROIs Indexed to TV



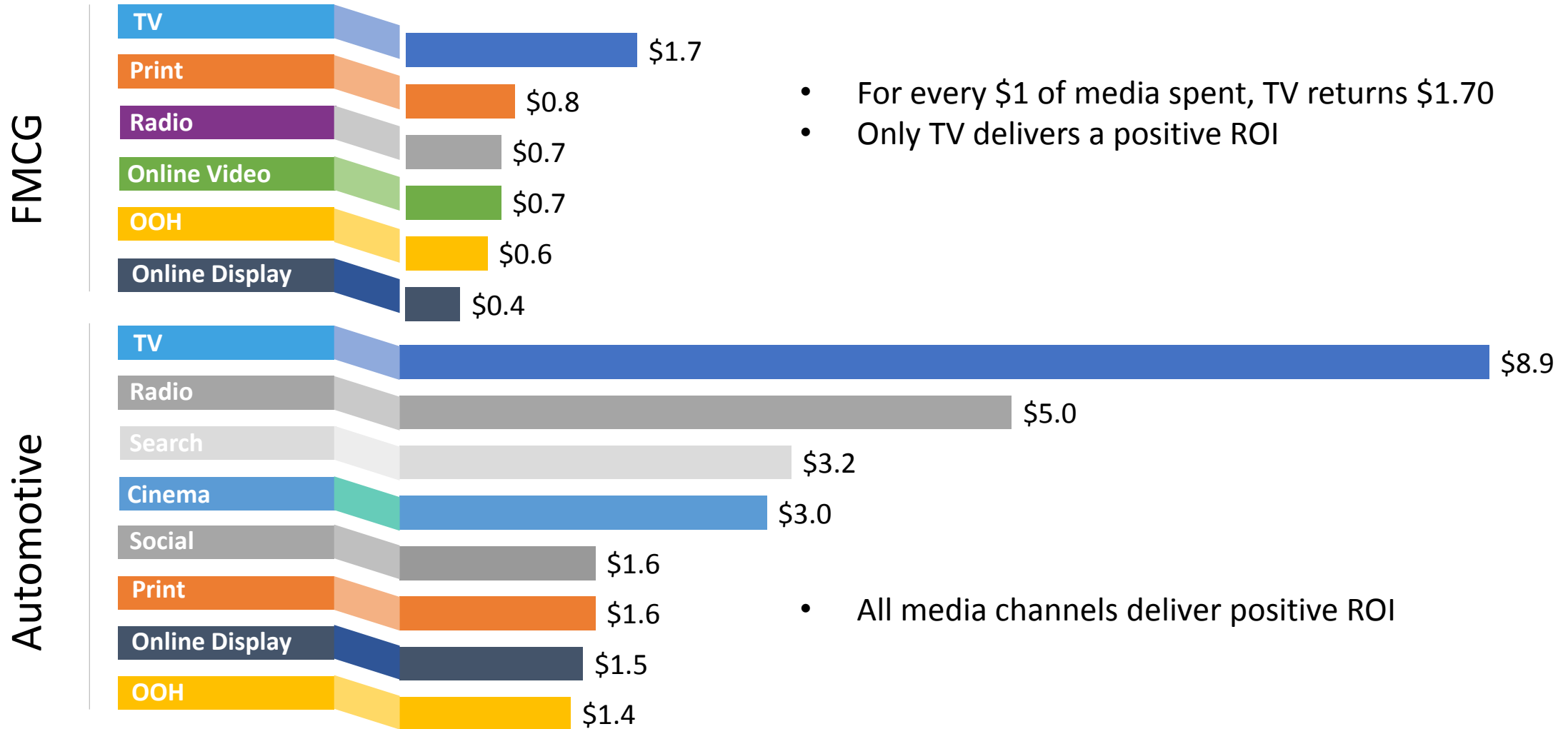
Source: Payback Australia Study, Ebiquity

Overall Return by Category



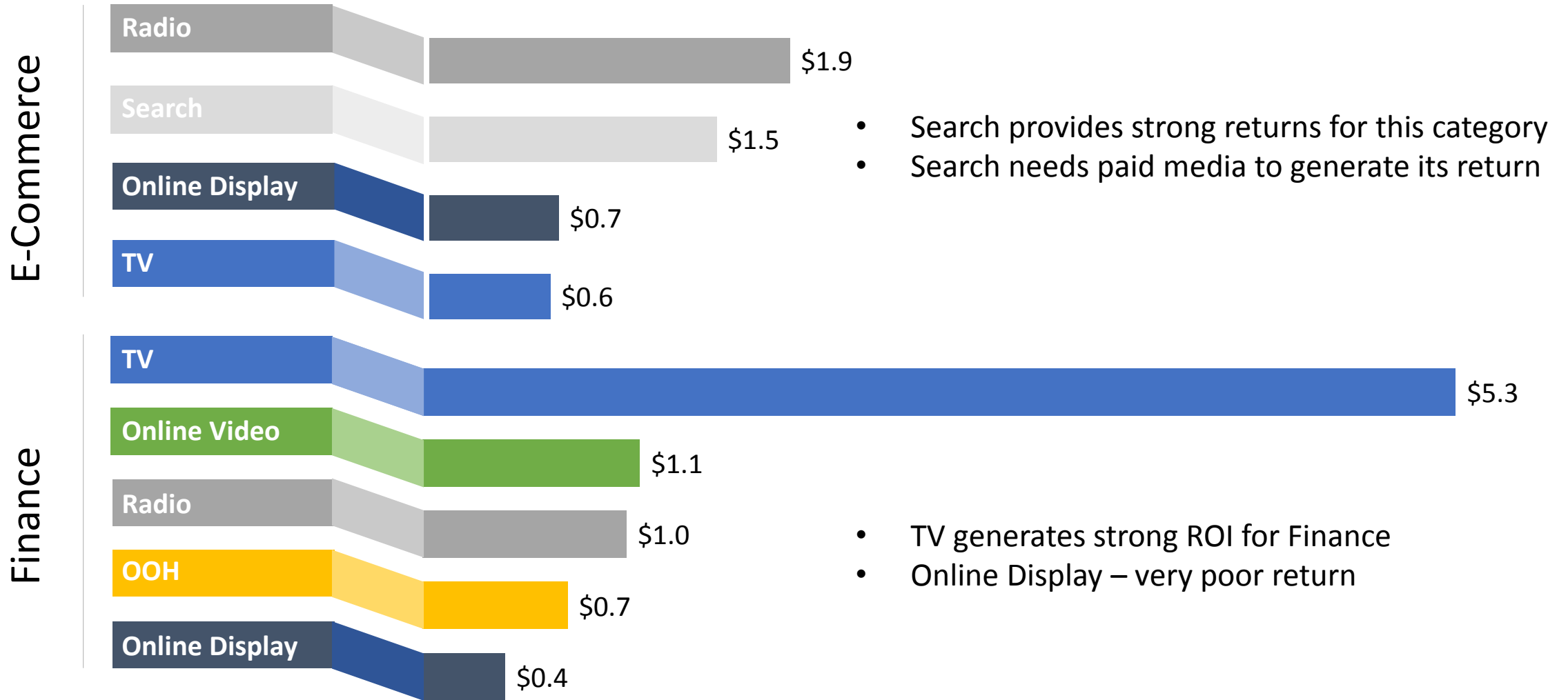
Source: Payback Australia Study, Ebiquity

ROI's Amounts Differ but Order is Consistent



Source: Payback Australia Study, Ebiquty

E-Commerce Unique Finance Similar to Auto



Source: Payback Australia Study, Ebiqity

The Evidence is In

Advertising investment pays back with TV the most efficient

- Payback Australia was conducted on 21 brands, whose media investment represents approximately 1/3rd of the \$15bn spent annually in the Australian Market
- Regardless of category, on average, every \$1 invested in TV advertising, returns more than \$1 in revenue with Automotive being the standout

FMCG: TV is a crucial sales lever

Automotive: All advertising delivers positive ROI

- TV generated almost \$9 in revenue for every \$1 invested

E-Commerce: Search is crucial

- Radio was the most efficient media platform for E-Commerce
- Search also provides a positive return (\$1.50 for every \$1 spent)
 - Paid Media helps drive search (90% from TV)

Finance: TV anchors ROI

- online display provides a poor return in this category, however online video generates positive ROI

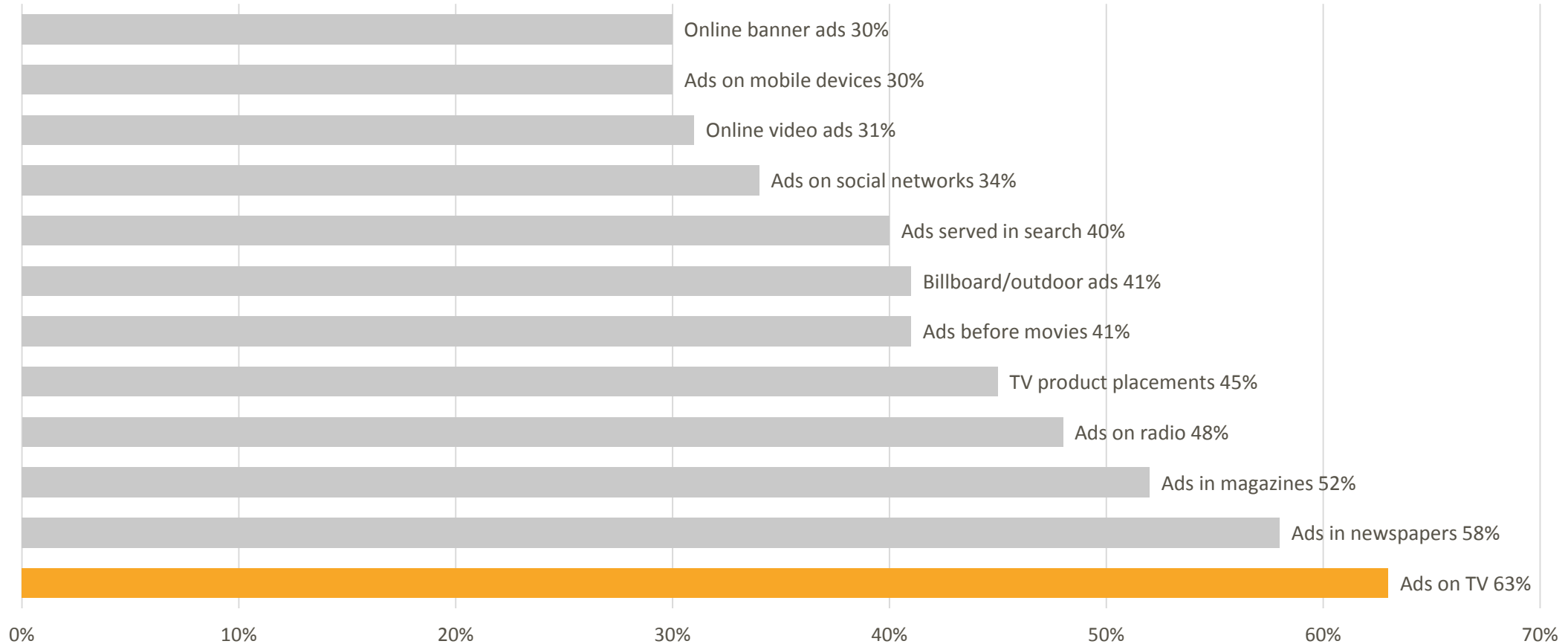
**“AUSTRALIANS
RATE TV AS THE
NO.1 INFLUENCER
ON PURCHASING
DECISIONS”**

Source: 2016 Deloitte Consumer Report - To what degree do the following influence your buying decisions? 55% of respondents perceive television ads to have a high or medium influence on buying decisions. Based on paid media.



TV IS THE ULTIMATE RESPONSE MEDIUM

Response to advertising platforms – sometimes or always take action

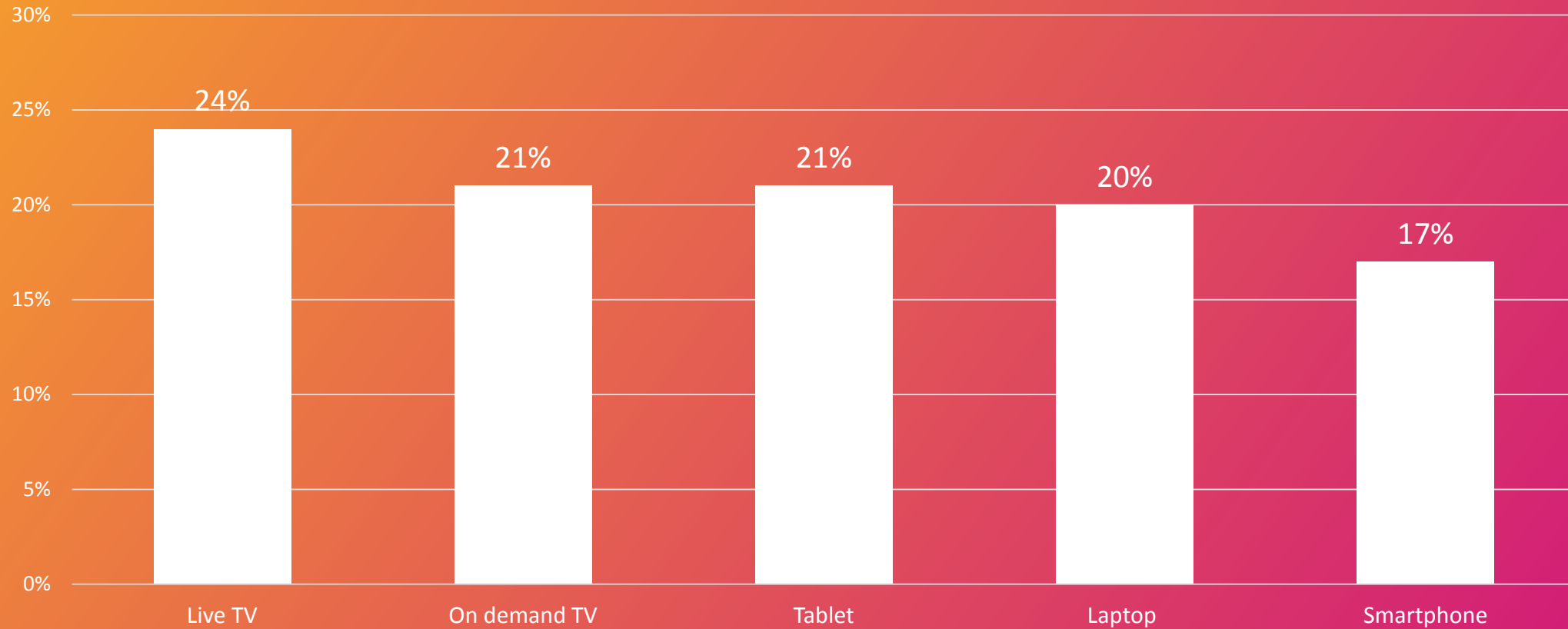


Source: Nielsen Global Trust in Advertising Survey Q1 2015.



ADS ON TV COMMAND MORE ATTENTION

% favourable device



Source Millward Brown's Ad Reaction study – Australia 2015 - Q: Thinking about all the kinds of ads you see in this place, how would you characterize your attitude towards the following formats of advertising?

TV IS SAFE, MEASURABLE & RELIABLE

TV advertising plays full screen, is 100% viewable, 100% of the time with viewing figures 100% accountable.

TV has been independently measured and audited for over 16 years

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

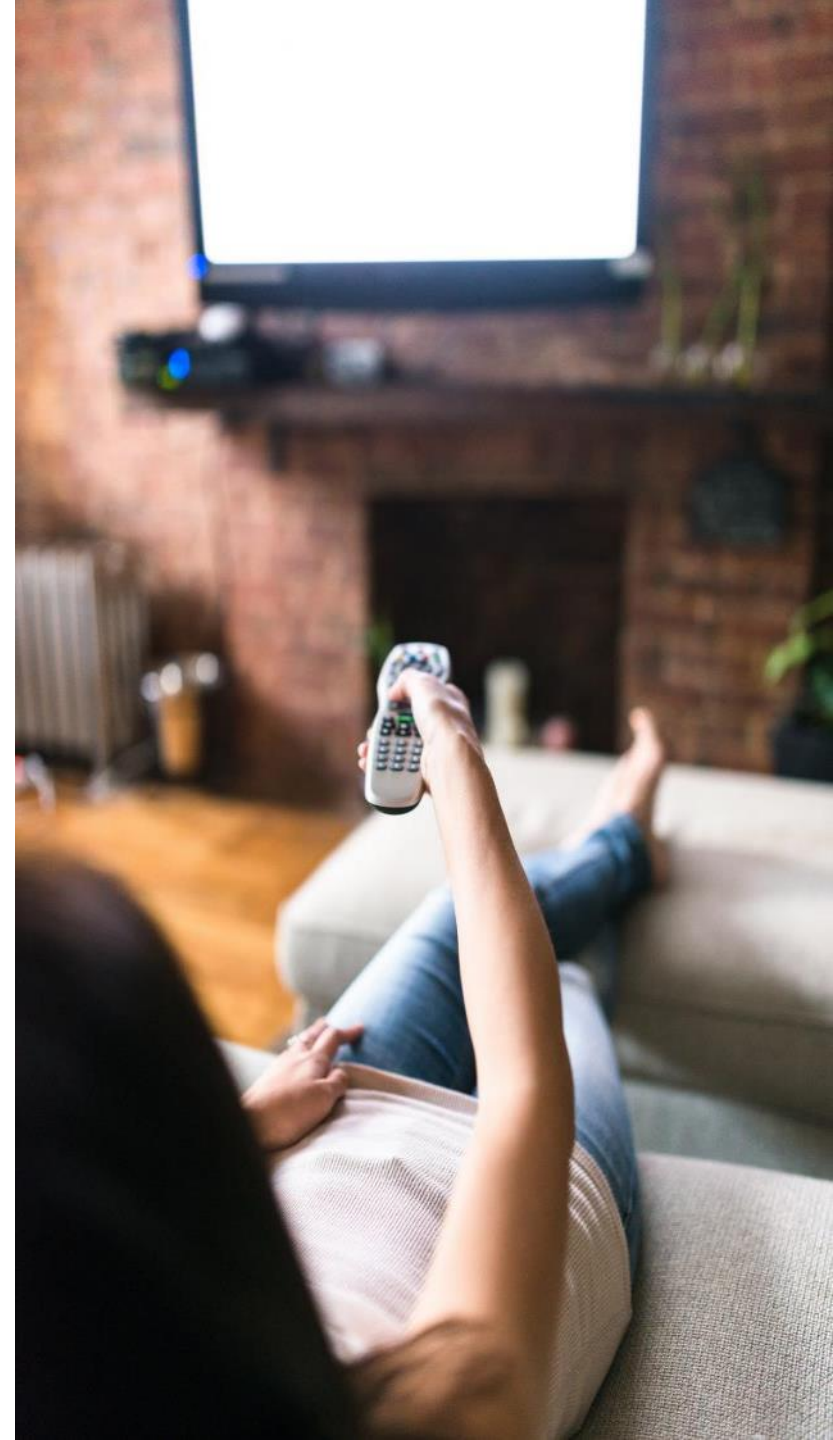
OzTAM and RegionalTAM in-home TV audience panels provide minute-by-minute viewing data – 24 hours per day, seven days a week, 365 days each year – for more than 100 channels (free-to-air and subscription) across dozens of demographic variables.

In addition to broadcast TV ratings, OzTAM measures online catch-up TV and live streaming on devices.

OzTAM's services comply with the quality service requirements of: AS ISO 20252 (Market Opinion and Social Research) and AS ISO 9001 (Quality Management Systems).

OzTAM and RegionalTAM are constantly reviewed for compliance and suitability, ensuring that they continue to provide a world-class television audience measurement service.

All programming content meet broadcast guidelines set by ACMA and are enforceable by law



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