

TV2020



FREQUENTLY ASKED QUESTIONS

How much TV do Australians watch?

Australians watch over 68 hours of TV a month.

Do young people watch TV anymore?

Yes. People under 35 watch up to 34 hours of TV a month.

How many people can I reach in a week on TV?

TV reaches almost 80% of all Australians in an average week, or just over 18m people.

Is BVOD a viable alternative to social video?

Yes. BVOD is growing at around 35% each calendar half.

What's the most common screen for watching video-on-demand?

Connected TV sets now account for almost half of all BVOD consumption.

The Commercial TV Networks now support 6 second ad formats. Do they work?

Ads of any length are more effective when viewed on TV or BVOD compared to viewing the same ad on social video. That's because whether on the TV set or on BVOD, TV ads are 100% viewable with sound on.

Some Networks are now charging per completed view.

Are BVOD ads 100% viewable?

Yes. Unlike social video, BVOD renders full screen, plays with sound on and is 100% viewable.

The Commercial TV Networks say you can now buy targeted audiences for BVOD. Is this true?

TV is everywhere and this facilitates the purchase of either broad or targeted audiences to suit objectives.

All Networks have announced major data developments. Will that help my ads be more effective?

With the launch of VOZ in 2020, you will be able to measure total TV audience reach across screens.

Do linear TV and BVOD advertising work well together?

Yes. In fact a combination of linear TV and BVOD generates twice the sales impact of TV combined with social video.

Does BVOD extend the reach of TV campaigns?

Yes. Early data from VOZ shows that for some demos BVOD delivers more than 10% incremental reach.

How much have the Commercial TV Networks invested in local production for 2020?

A record \$334m was invested locally in TV Drama alone in F19, more than 6x online streaming services. In addition 80% of Australian TV production budgets are local.

TV HAS BROAD REACH AND ENGAGING CONTENT

**TV REACHES
18.4m**

Australians per week

**WEEKLY
REACH
77.4%**

**WEEKLY
HOURS
15:50**

**Monthly Reach
90.4%**

**Monthly Hours
68:14**

**Kids
34:20**

**Teens
17:41**

**18-24
20:27**

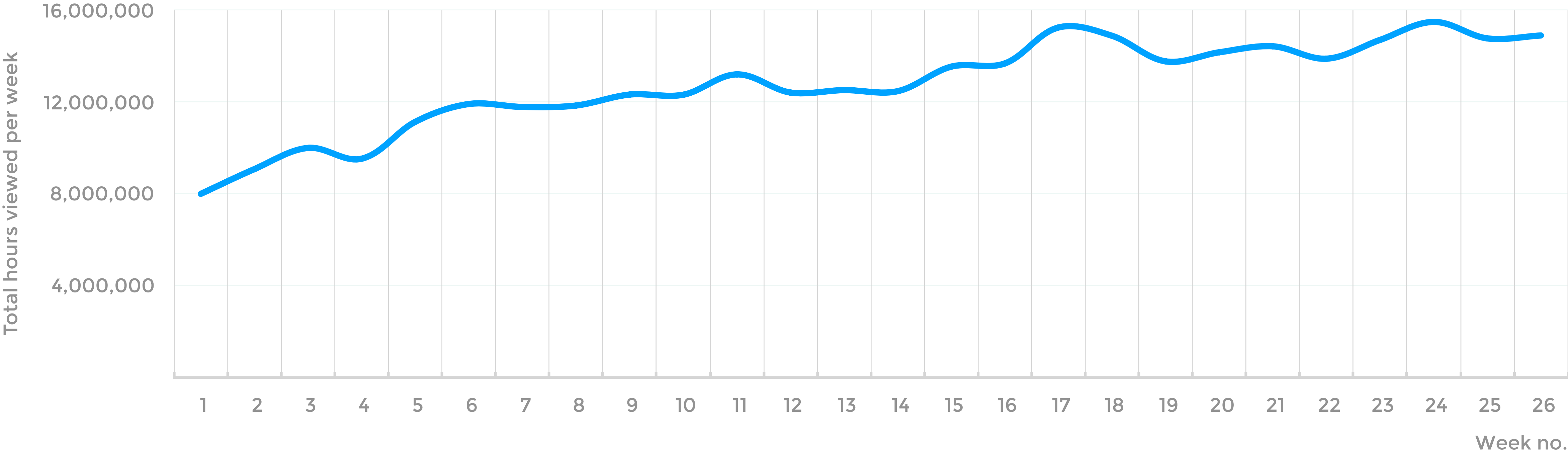
**25-34
34:08**

**35-49
64:53**

Source: BVOD- OzTAM VPM. 1Jul 2018 00h00- 31 Dec 23h59 & 1 Jan 2019 00h00- 30 Jun 23h59; Consolidated 28 day combined OzTAM Metro and Regional TAM databases with Overlap homes de-duplicated. TIME SPENT-Average time spent viewing [ATV 0200-2600 (2am- 2am)] across the population in TV homes within metered markets. Includes free-to-air and subscription television viewing. Fractional minutes have been rounded; REACH Average 1-minute weekly cumulative reach across the population in OzTAM and Regional TAM coverage areas. Includes live viewing and playback through the TV set within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600 = 2am-2am; PRODUCTION COSTS- Screen Australia Drama Report, 18/19.

IN ADDITION TO LINEAR TV AUSTRALIANS ARE WATCHING MORE AND MORE BVOD

BVOD Total hours viewed per week H1, 2019

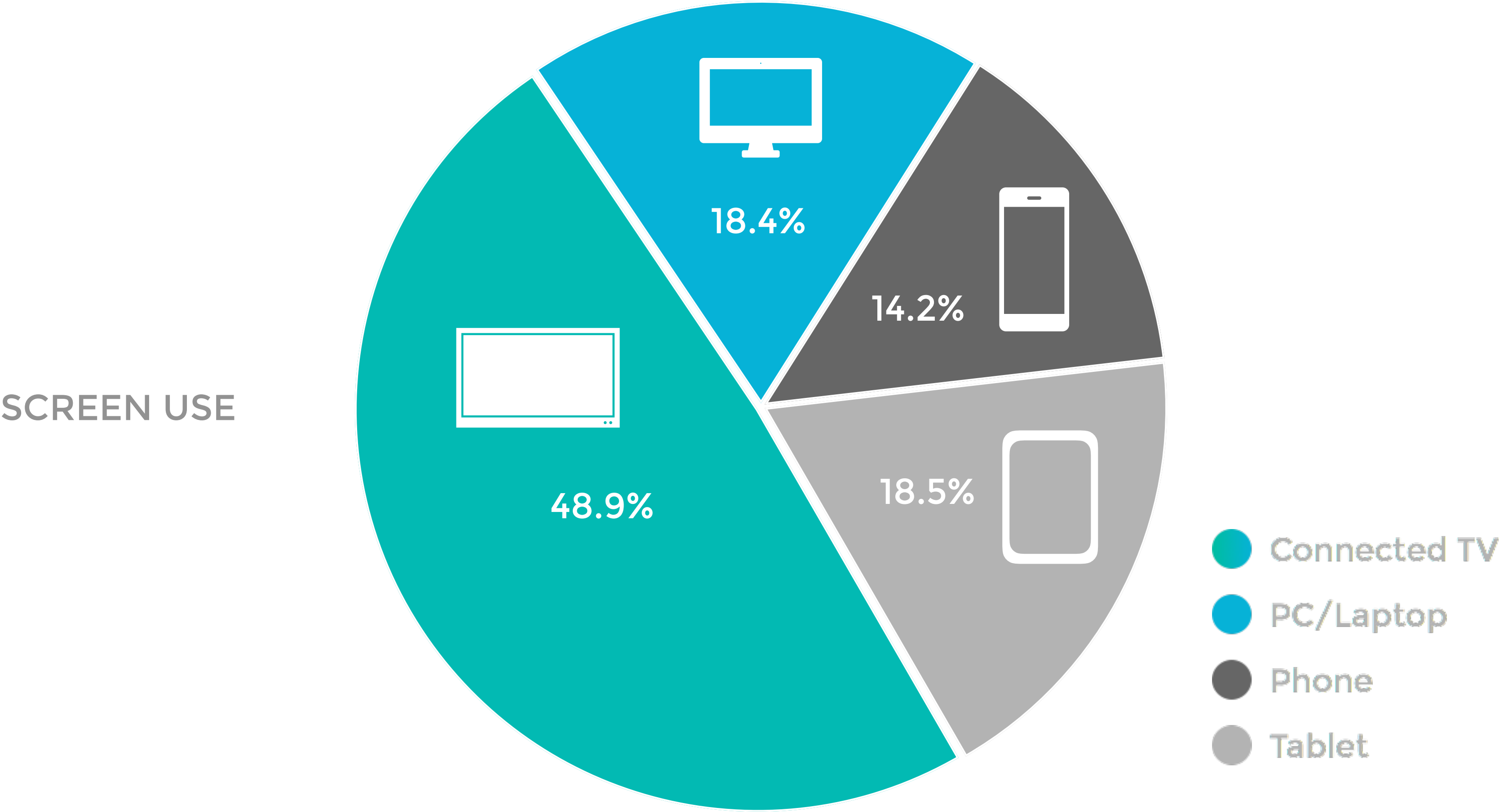


	Wk 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26
Hours pw (millions)	8.0	9.1	10.0	9.5	11.1	11.9	11.8	11.8	12.3	12.3	13.2	12.4	12.5	12.5	13.5	13.7	15.2	14.9	13.8	14.2	14.4	13.9	14.7	15.5	14.8	14.9

Source: BVOD- OzTAM VPM. 1Jul 2018 00h00- 31 Dec 23h59 & 1 Jan 2019 00h00- 30 Jun 23h59; Consolidated 28 day combined OzTAM Metro and Regional TAM databases with Overlap homes de-duplicated. TIME SPENT-Average time spent viewing [ATV 0200-2600 (2am- 2am)] across the population in TV homes within metered markets. Includes free-to-air and subscription television viewing. Fractional minutes have been rounded; REACH Average 1-minute weekly cumulative reach across the population in OzTAM and Regional TAM coverage areas. Includes live viewing and playback through the TV set within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600 = 2am-2am; PRODUCTION COSTS- Screen Australia Drama Report, 18/19.

thinkTV

BVOD IS PREDOMINANTLY WATCHED ON CONNECTED TV SETS






Source: BVOD- OzTAM VPM. 1Jul 2018 00h00- 31 Dec 23h59 & 1 Jan 2019 00h00- 30 Jun 23h59; Consolidated 28 day combined OzTAM Metro and Regional TAM databases with Overlap homes de-duplicated. TIME SPENT-Average time spent viewing [ATV 0200-2600 (2am- 2am)] across the population in TV homes within metered markets. Includes free-to-air and subscription television viewing. Fractional minutes have been rounded; REAHCH Average 1-minute weekly cumulative reach across the population in OzTAM and Regional TAM coverage areas. Includes live viewing and playback through the TV set within 28 days. Time bands use the industry standard 26-hour TV clock: 0200-2600 = 2am-2am; PRODUCTION COSTS- Screen Australia Drama Report, 18/19.

TV, ON ANY SCREEN, IS SUPERIOR TO SOCIAL VIDEO FOR ATTENTION, VIEWABILITY AND SALES IMPACT.

	ATTENTION	VIEWABILITY	SALES IMPACT
TELEVISION	63	100	161
FACEBOOK	54	58	121
YOUTUBE	44	82	137

Source: The Benchmark Series, Video Advertising on Mobile, ThinkTV, 2018

EXTENDING THE REACH OF TV WITH BVOD GENERATES TWICE THE SALES IMPACT OF TV COMBINED WITH SOCIAL VIDEO

FIRST VIEW	SECOND VIEW	CROSS PLATFORM STAS	SALES IMPACT
	BVOD on mobile	172	-
	Facebook on mobile	135	TV + BVOD is 2X higher than TV + Facebook
	YouTube on mobile	130	TV + BVOD is 2.4X higher than TV + YouTube

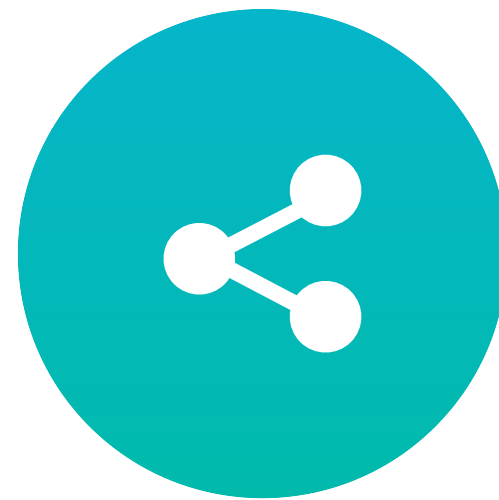
Source: The Benchmark Series, Cross-Platform Effects, ThinkTV, 2019

IN 2020 VOZ WILL BRING CROSS SCREEN TV PLANNING AND REPORTING



Advertisers and media agencies

Can create and post-evaluate media plans encompassing TV inventory across all broadcast TV inventory across all broadcast channels and devices and manage cross-screen campaigns - including de-duplicated, cross-device audience reach goals right up to a national level. VOZ has been built to allow the industry to agree a common set of advanced targets (audience segments) to support planning and post-analysis beyond standard age/sex demographics in future.



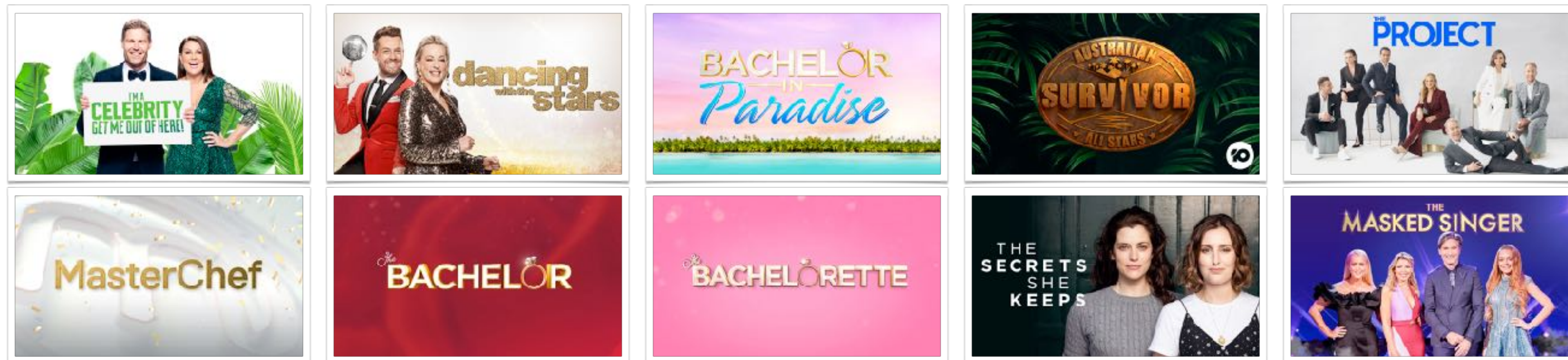
TV networks

Can get a complete picture of the audience consuming their content over time and across screens, determine BVOD incremental reach, and optimise their offer across all channels, markets, platforms and devices.



The media industry

Gains and objective, independent, transparent and standard metric by which to evaluate the performance of TV content across all screens and platforms, and is consistent with the established TAM and VPM currencies.



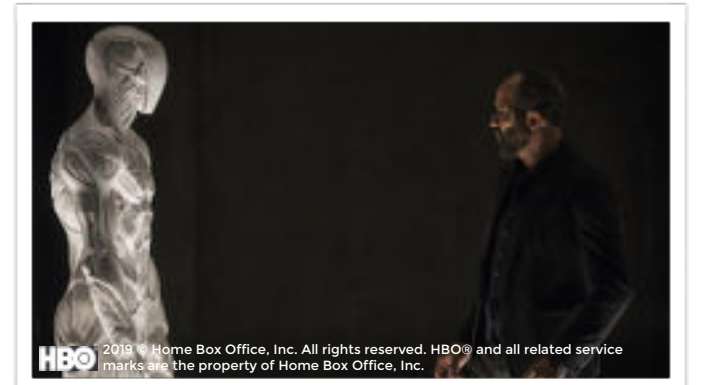
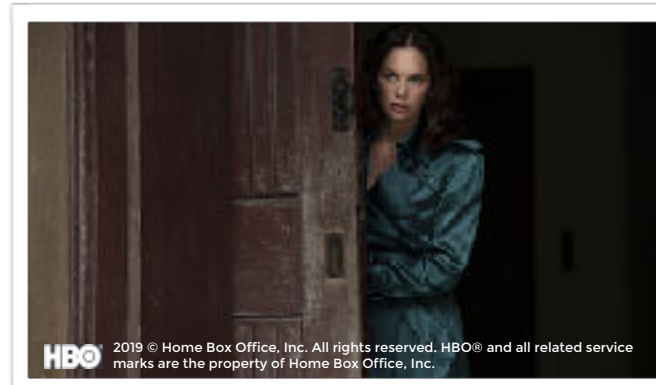
Innovative advertising solutions

10 opens up dynamic trading opportunities:

- Buy10: Simplifies ad planning and trading across 10's assets and allows precision targeting, inventory optimisation and automated tracking, ultimately delivering advertisers more cost-effective campaigns.
- Buy10 YOU: A self serve buying platform for SME advertisers.
- 10 is also launching real-time commercial availability on-demand to remove the friction of manual ad-planning.
- Data partnerships with Quantum, EyeOta and Greater Data will extend 10's targeting capabilities with a focus on purchase behaviour, life-stage triggers and in-market signals.

Innovating user experience

10's You.i.TV partnership will optimise the user experience for 10Play across all video streaming platforms as well as unlocking powerful new ad formats to include passive, interactive or non-intrusive formats.



Innovative advertising solutions

Foxtel Media brings a suite of new advertising innovations:

- Q Break: Linear 6 second advertisements
- M Break: Reduced linear ad loads
- Ad-pods: 30-second pre-rolls across Foxtel digital assets with no mid rolls across all Foxtel digital assets.
- A unified Digital Experience across Foxtel Digital platform.
- Targeted Video on Demand advertising: New targeting options based on de-identified, privacy compliant subscriber data for VOD platforms.
- IP Ad insertion: Upgraded live streaming to enable to insertion of digital advertising.

Innovating user experience

The New Foxtel Experience provides customers with iQ3 and iQ4 set top boxes bringing together the best of TV and BVOD.

Foxtel will provide Netflix via iQ4 and ABC iView through iQ3 and 1Q4.



Innovative advertising solutions

Nine will unify its data assets:

- Creating Australia's largest addressable marketplace with more than 11 million IDs.
- Providing marketers with the ability to target at scale within a premium, brand-safe environment.
- 9Tribes customer segmentation allows advertisers to target 54 unique audiences across all of Nine's verticals and properties.
- Data partnerships with Quantum, Equifax Marketing Services and Red Planet will provide expanded targeting capabilities.
- Nine Powered will provide a new Advertising Effectiveness offering to provide econometric modelling and real-time audience response measurement through partnerships with Adgile Media and TVSquared, as well as brand health tracking.

Innovating user experience

Nine brands such as Domain, CarAdvice, GoodFood, Traveller, Good Weekend and Sunday Life will be super-charged across platforms.



Innovative advertising solutions

- Tokyo 2020 will be the biggest digital event in Australian history – equivalent to a grand final every day for 17 days straight.
- 7Plus will be the online Olympic hub with a forecast of 5 million Australian's to engage with the platform across Tokyo 2020.
- CODE 7 is Seven's easy, one-place-to-buy solution, providing guaranteed audience delivery for broadcast (metro and regional) and digital and removing make-goods.
- 7CAP is an Australia's first Contextual Ad Placement service. Partnership with Amazon Web Services enables AI and machine learning to identify objects, environments and mood states as context for brand integration to maximise impact, cut-through and ROI.

Innovating user experience

Seven's investment in creating world class streaming experience for Tokyo 2020 will create benefits for years to come.

- Enhanced content discovery, personalisation, ad formats and member benefits
- First ever multilingual Olympics offering.



For more information contact us
contact@thinktv.com.au