

**MAKE TOTAL TV
FIRST ON, LAST OFF
EVERY MEDIA PLAN**



**WEEK AFTER WEEK,
TOTAL TV REACHES
19+ MILLION
AUSTRALIANS**

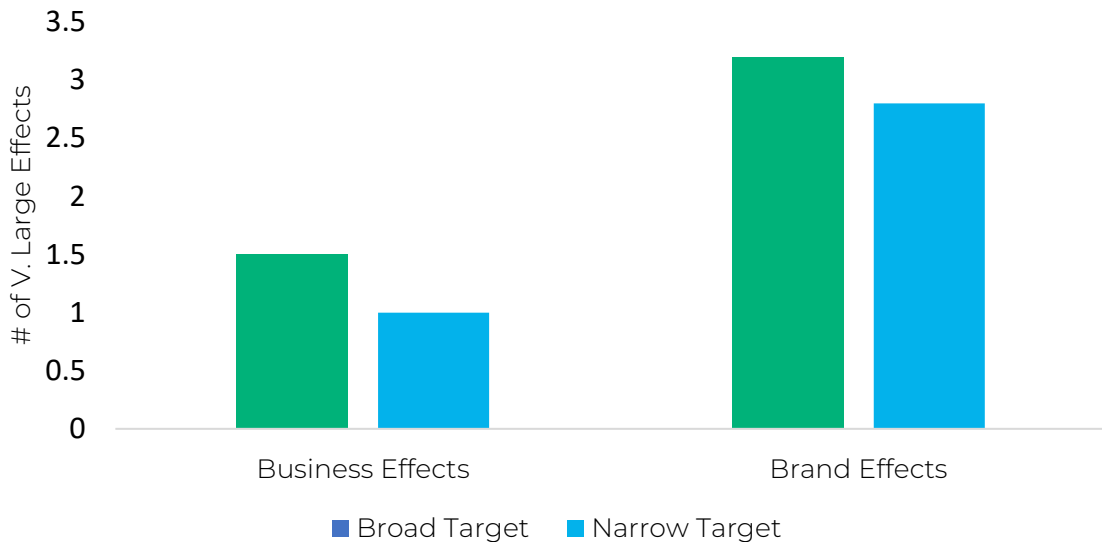


Source: VOZ 5.0 National Total TV (All Broadcast Networks + Affiliates and STV channels) Broadcast TV and BVOD (live + on demand incl co-viewing) When Watched, Cumulative Reach 1 minute (broadcast TV) 15secs (BVOD), Sunday to Saturday 02:00-02:00.

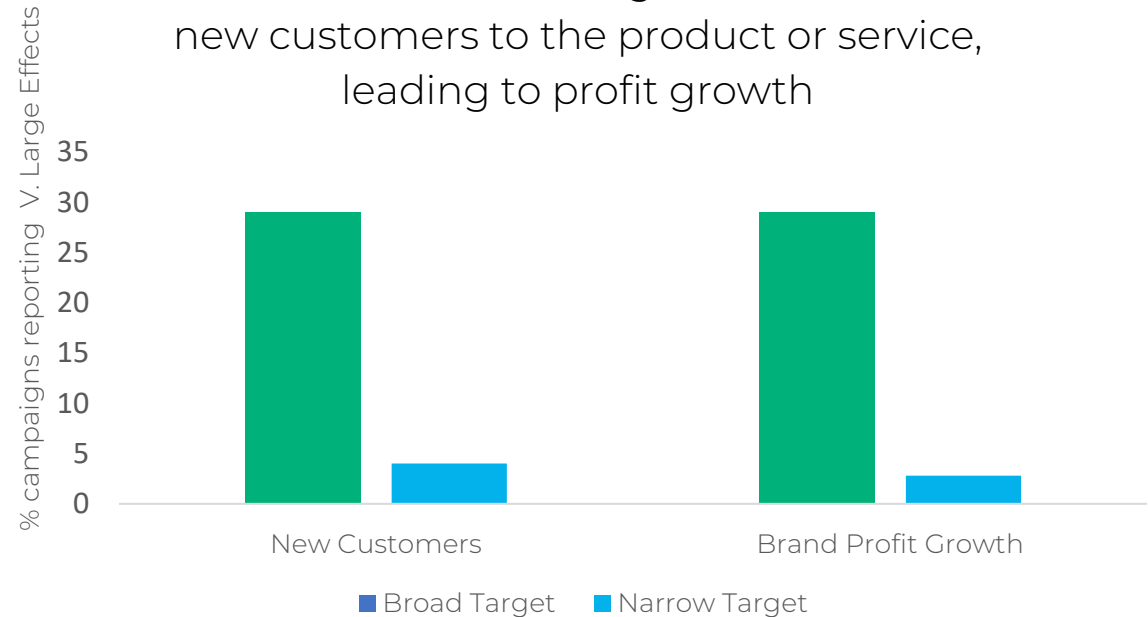
The most effective campaigns use broad reach media

While plenty of channels can reach large numbers of the Australian population, few can do it as quickly and simultaneously as TV.

Broad targeting is more effective in generating business and brand effects

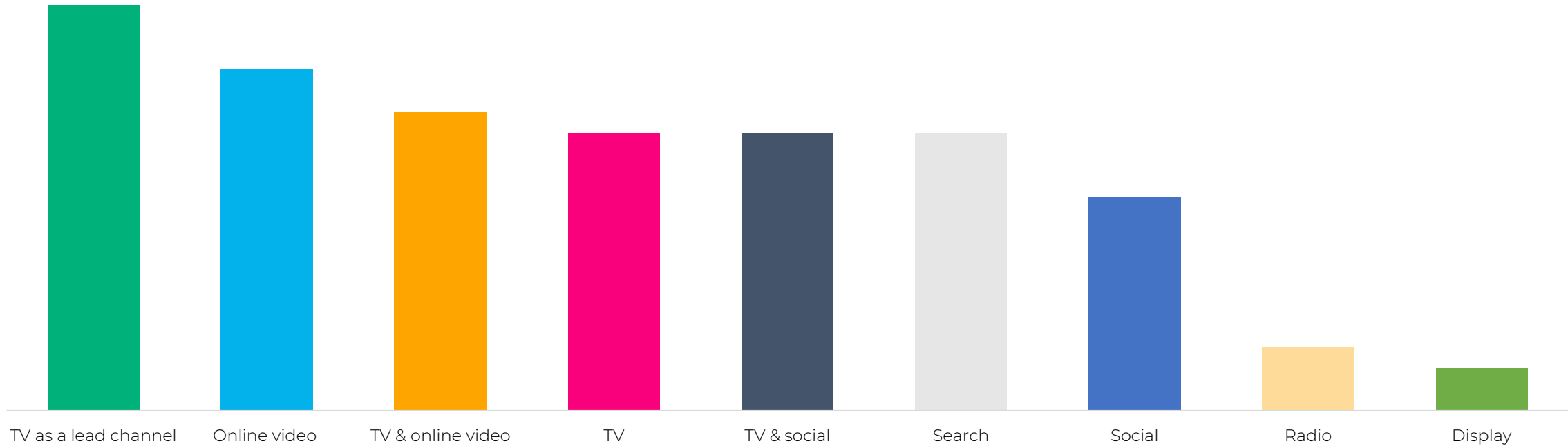


...the effect of a broad target is an increase in new customers to the product or service, leading to profit growth



■ TV is the most used media for broad reach

TV as the lead channel for generating broad reach was used 19% more in highly effective campaigns vs less effective campaigns.





TOTAL TV DOMINATES VIDEO VIEWING



Source: Kantar CrossMedia Database 179 campaigns, Total TV includes BVOD and Linear.

Total video viewing: In-home viewing on any device

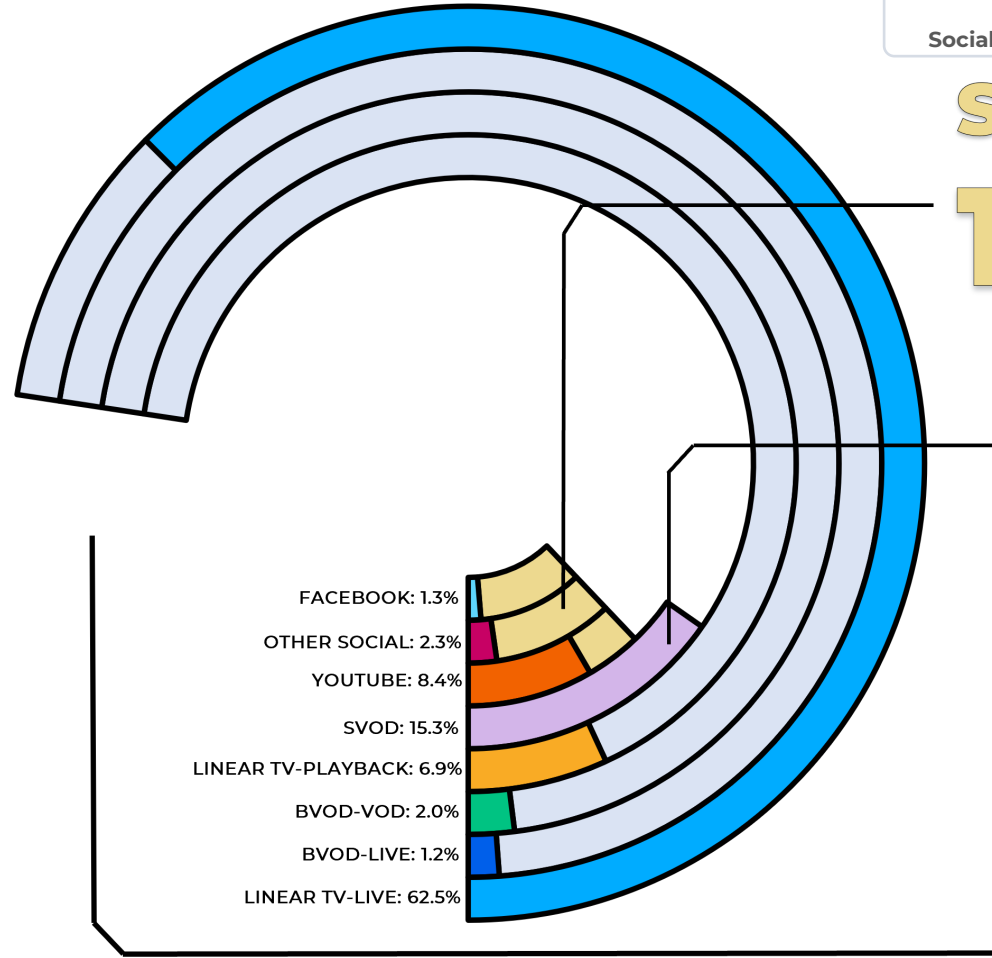
Category examples

AVOD - Vimeo; TubiTV; BitTorrent Now; Dailymotion; PLEX

BVOD - ABC iView; 7plus; 9now; 10 play; SBS On Demand; Foxtel Now

SVOD - Netflix; Stan; Disney+; Amazon Prime Video; Apple TV+; Kayo; Bing; Paramount+; Britbox; Hayu; AcornTV

Social Video - Facebook; YouTube; Instagram; TikTok; Snapchat; TwitchTV



SVOD: 15.3%
 Total TV: 72.6%
 Social Video: 12.1%

SOCIAL VIDEO

12.1%

SVOD

15.3%

TOTAL TV

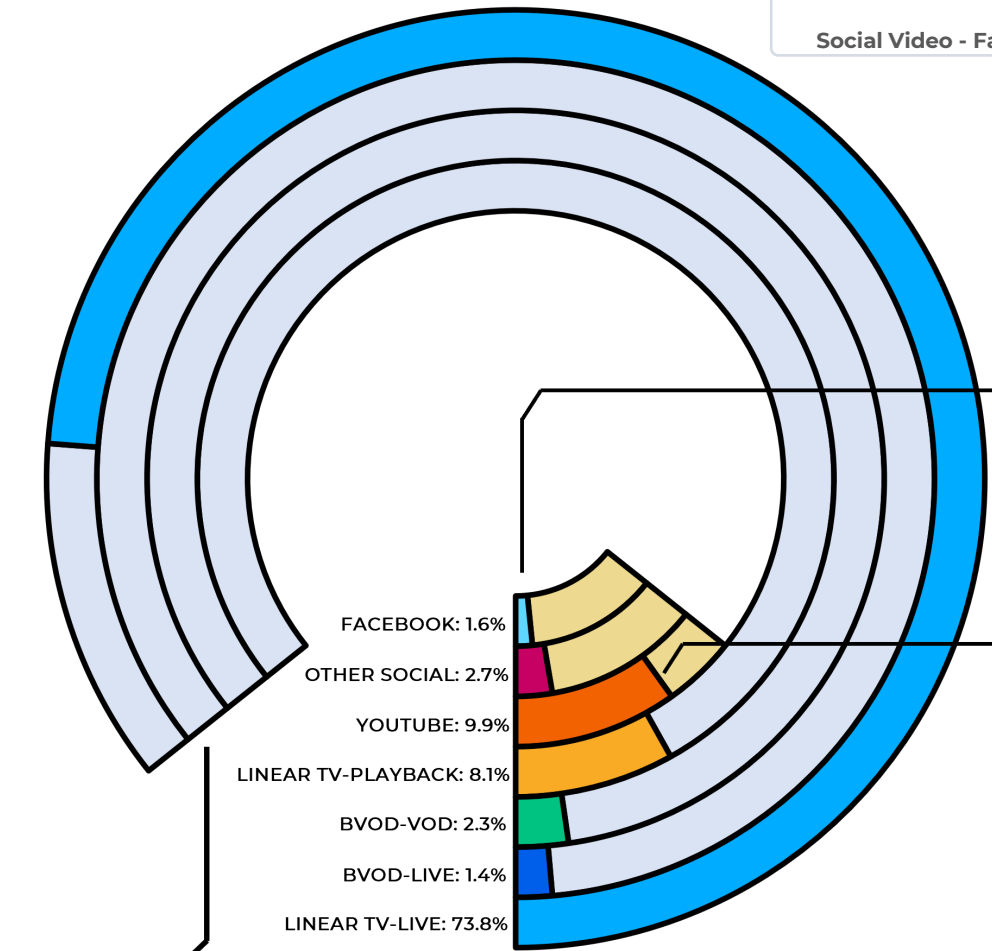
72.6%

Source: OzTAM National Streaming Meter and TAM Panels Jul-Dec 2022, weighted to National Establishment Survey estimates of TV, BVOD, SVOD and STV usage; all figures based on total people; includes all captured in-home viewing by person on TV, PC, smartphone and tablet devices; personal devices have one viewer per session; TV has as many viewers as are registered for each viewing session, regardless of video type (ie all TV set viewing, including SVOD, BVOD and Social) can include multiple viewers. AVOD is 0.1% of total viewing and not shown.

Total ad-supported video viewing: In-home viewing on any device

Category examples
 AVOD - Vimeo; TubiTV; BitTorrent Now; Dailymotion; PLEX
 BVOD - ABC iview; 7plus; 9now; 10 play; SBS On Demand; Foxtel Now
 Social Video - Facebook; YouTube; Instagram; TikTok; Snapchat; TwitchTV

Total TV: 85.7%
Social Video: 14.3%



FACEBOOK
1.6%

YOUTUBE
9.9%

TOTAL TV
85.7%

Source: OzTAM National Streaming Meter and TAM Panels Jul-Dec 2022, weighted to National Establishment Survey estimates of TV, BVOD, SVOD and STV usage; all figures based on total people; includes all captured in-home viewing by person on TV, PC, smartphone and tablet devices; personal devices have one viewer per session; TV has as many viewers as are registered for each viewing session, regardless of video type (ie all TV set viewing, including SVOD, BVOD and Social) can include multiple viewers. AVOD is 0.1% of total viewing and not shown.

**TOTAL TV GENERATES
THE GREATEST
BRAND
IMPACT**



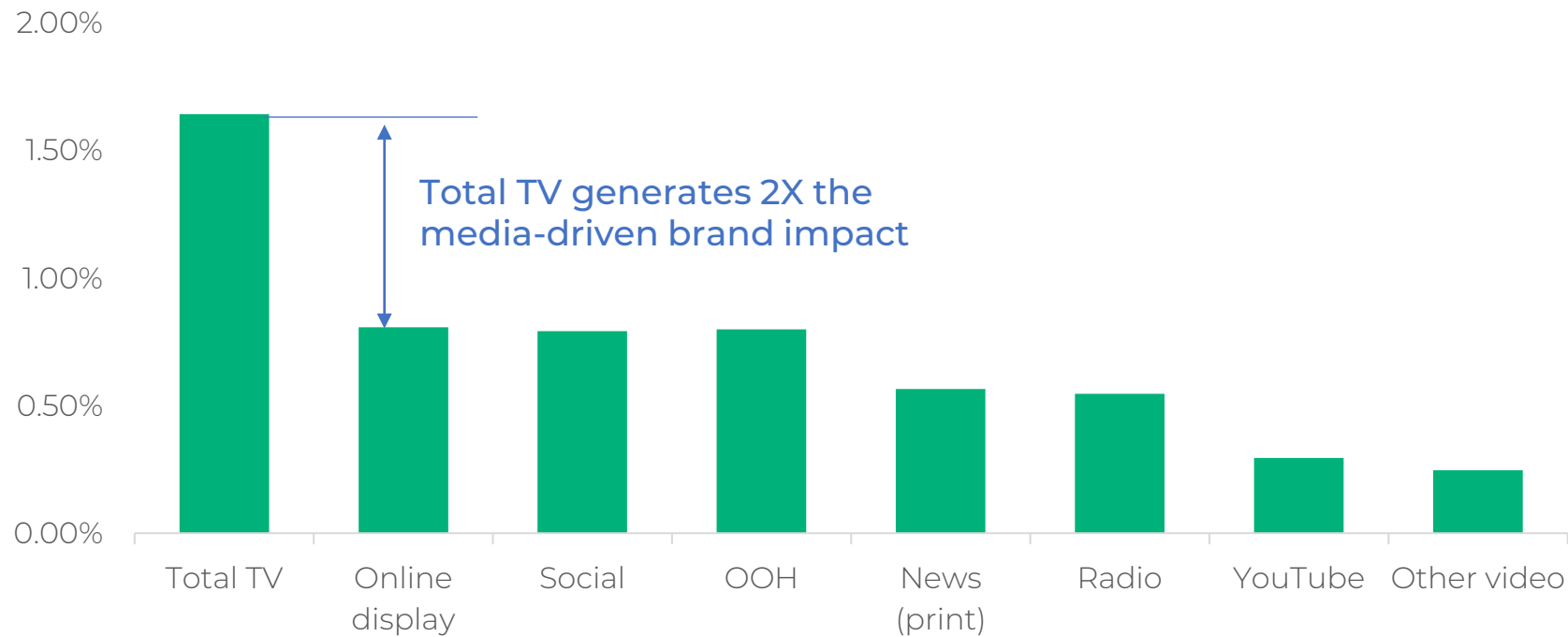
Source: Kantar CrossMedia Database 179 campaigns,
Total TV includes BVOD and Linear.



Overall media-driven brand impact

Regardless of communication objective, Total TV generates the greatest campaign brand impact.

All metrics – impact per channel

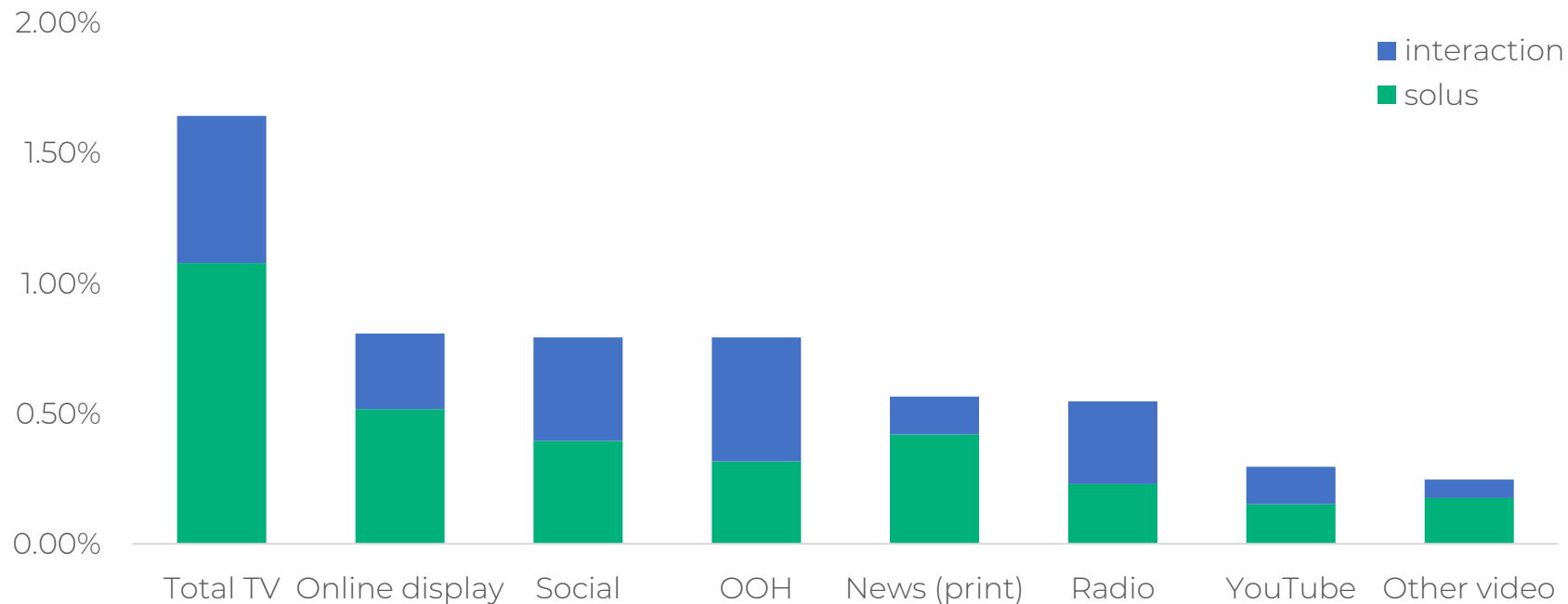


Source: Kantar CrossMedia Database 179 campaigns, Total TV includes BVOD and Linear. Other video is all video other than BVOD and YouTube.

TV delivers strong impact on its own but also sets up other media to perform

The impact each media channel has is a combination of the effect it can generate if it were to run on its own (**solus effect**) and the multiplier effect it has when it runs in combination with other media (**interaction effect**).

All metrics – impact per channel

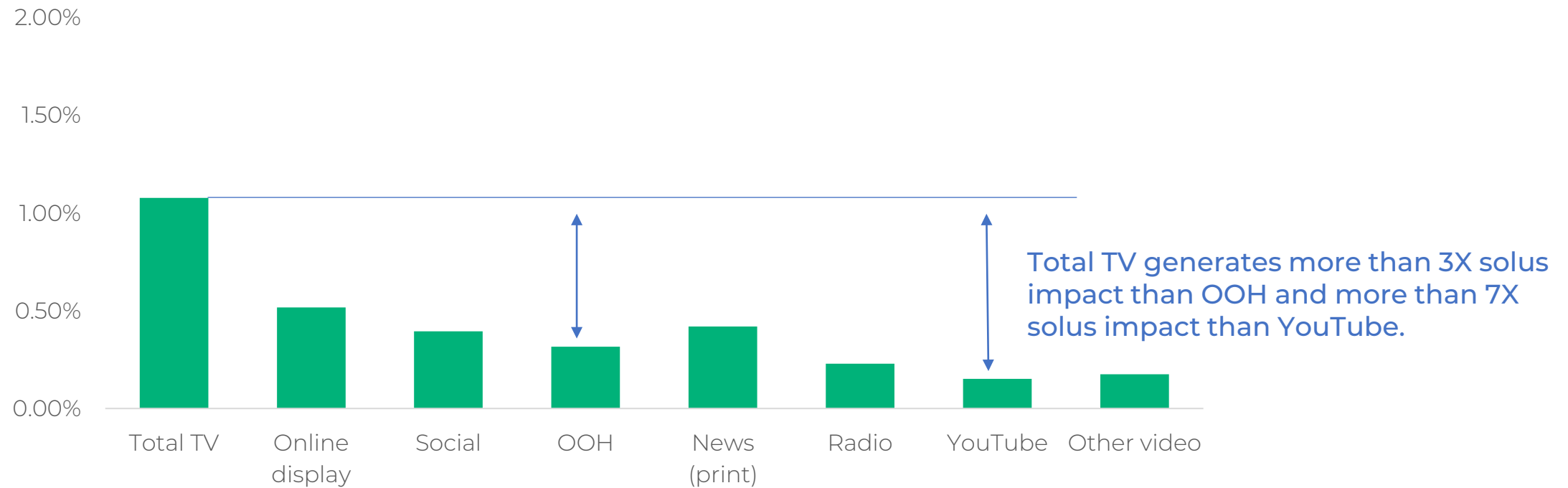


Source: Kantar CrossMedia Database 179 campaigns, Total TV includes BVOD and Linear. Other video is all video other than BVOD and YouTube.

■ The contribution of solus channel effects

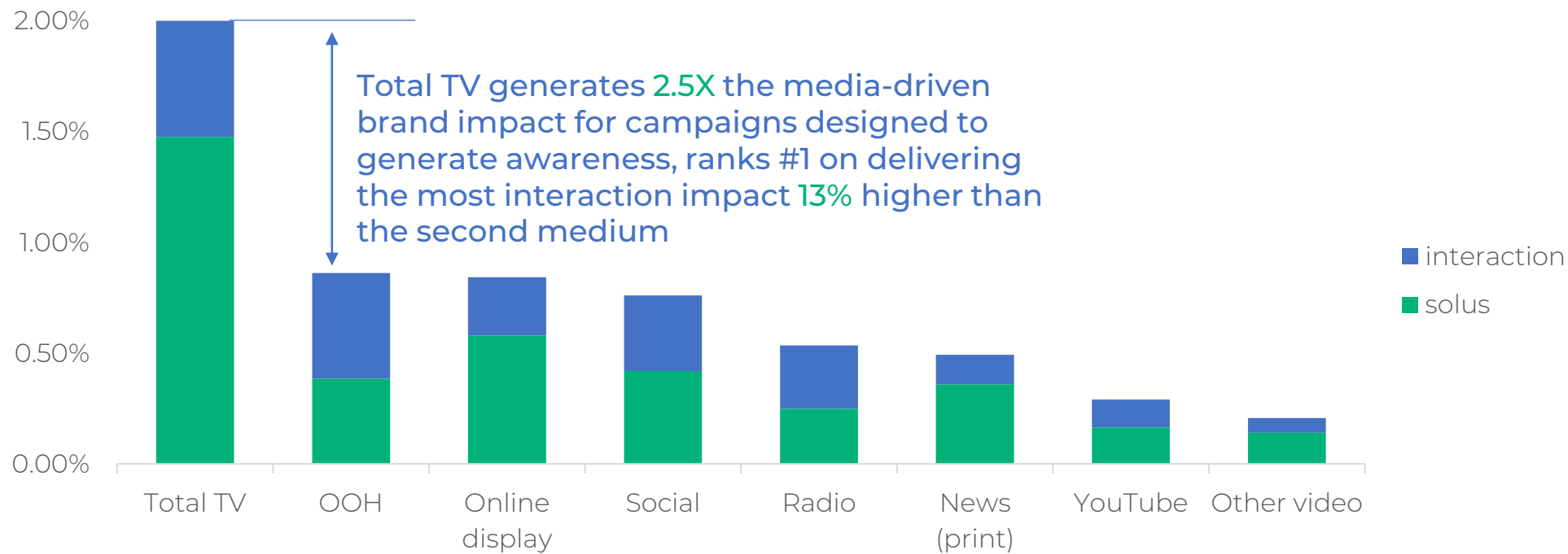
Solus impact will always do the heavy lifting in terms of overall campaign impact. The magnitude of difference in solus effects that TV generates is significantly stronger than other platforms.

All metrics – solus Impact per channel



■ Top of funnel brand awareness campaigns

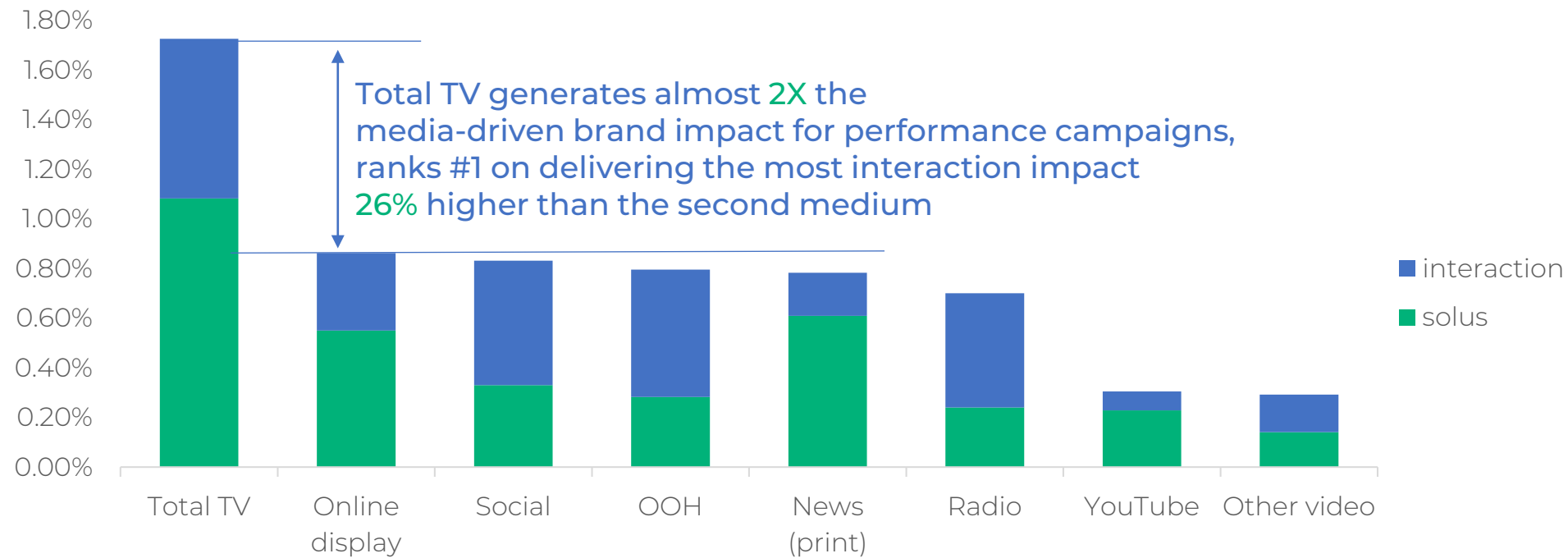
For brand building and campaigns designed to generate awareness, Total TV's impact is even greater than the next best channel, and the ratio of impact derived from solus is extreme. Awareness campaigns can often run on high-reach media without needing much campaign integration.



Source: Kantar CrossMedia Database 179 campaigns, Total TV includes BVOD and Linear. Other video is all video other than BVOD and YouTube.

Bottom of funnel conversion campaigns

For brand conversion and performance campaigns designed to promote features and benefits, the best performing media differ to those that drive awareness. The one constant however, is Total TV which again generates the strongest impact, this time for brand conversion.

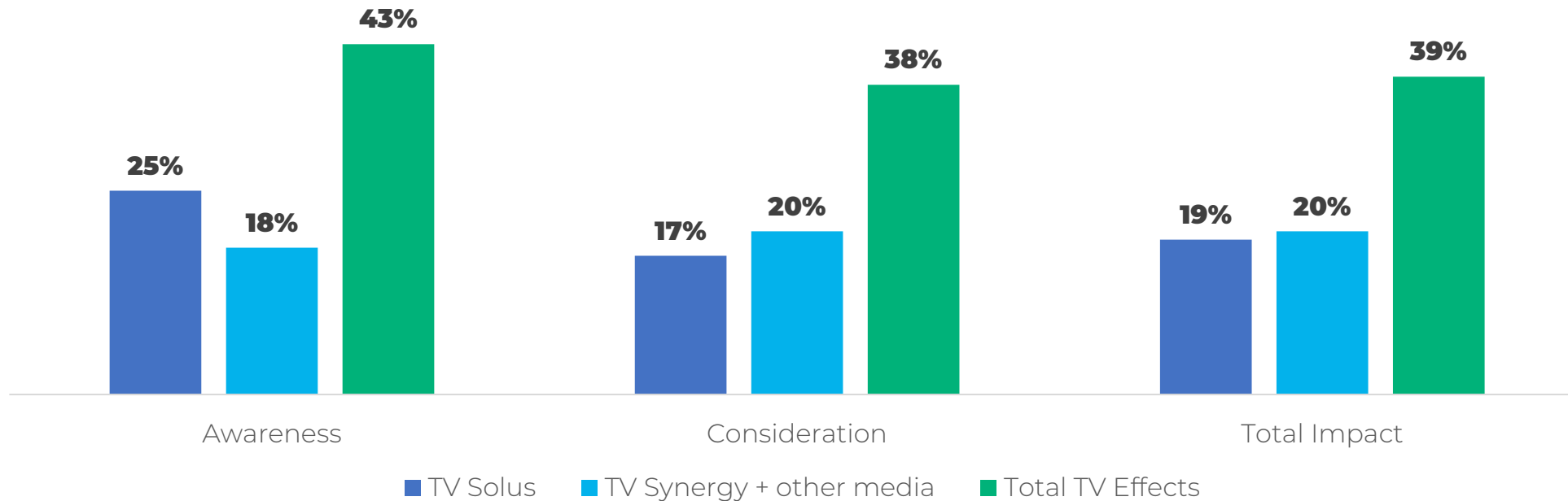


■ Across both solus and interaction effects, without TV in the mix we risk losing on average 39% of all brand impact

Choosing Total TV in your media mix will accentuate the impact you can derive at both the top and bottom of the funnel activities. Choosing other media instead of TV will result in a loss of campaign impact.

Share of Impact

- % of impact that TV is delivering on its own
- % of impact that TV is delivering in combination with other media
- Total impact of TV (solus + synergy)



NOTHING DELIVERS MORE
EYEBALLS ON
A PLATTER
THAN TOTAL TV



Source: Grab your audience by the eyeballs: The attention habits of consumers.



Viewing opportunity x attention paid x reach = platform effectiveness

Not all video is created equal with attention-based reach differing dramatically by platform. Research lab MediaScience studied eye tracking, biometric and galvanic skin responses of audiences when they consumed BVOD, YouTube and Facebook, proving when ads are in front of a viewer, the attention level is much higher for BVOD.

Facebook

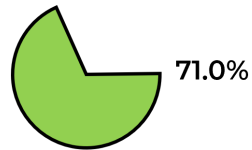
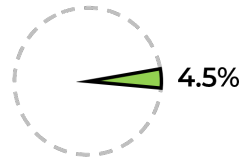
In-feed video fully viewed and exposed video in feed



16.6m

YouTube

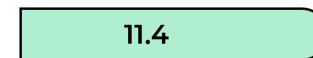
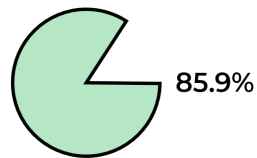
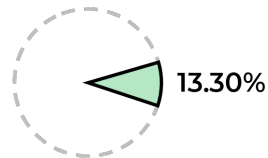
Unskippable pre-roll, skippable pre-roll and mid-roll in longer content



14.9m

BVOD

Pre-roll and mid-roll on roll-form content



17.5m

Viewing opportunity

Attention

Effective attention

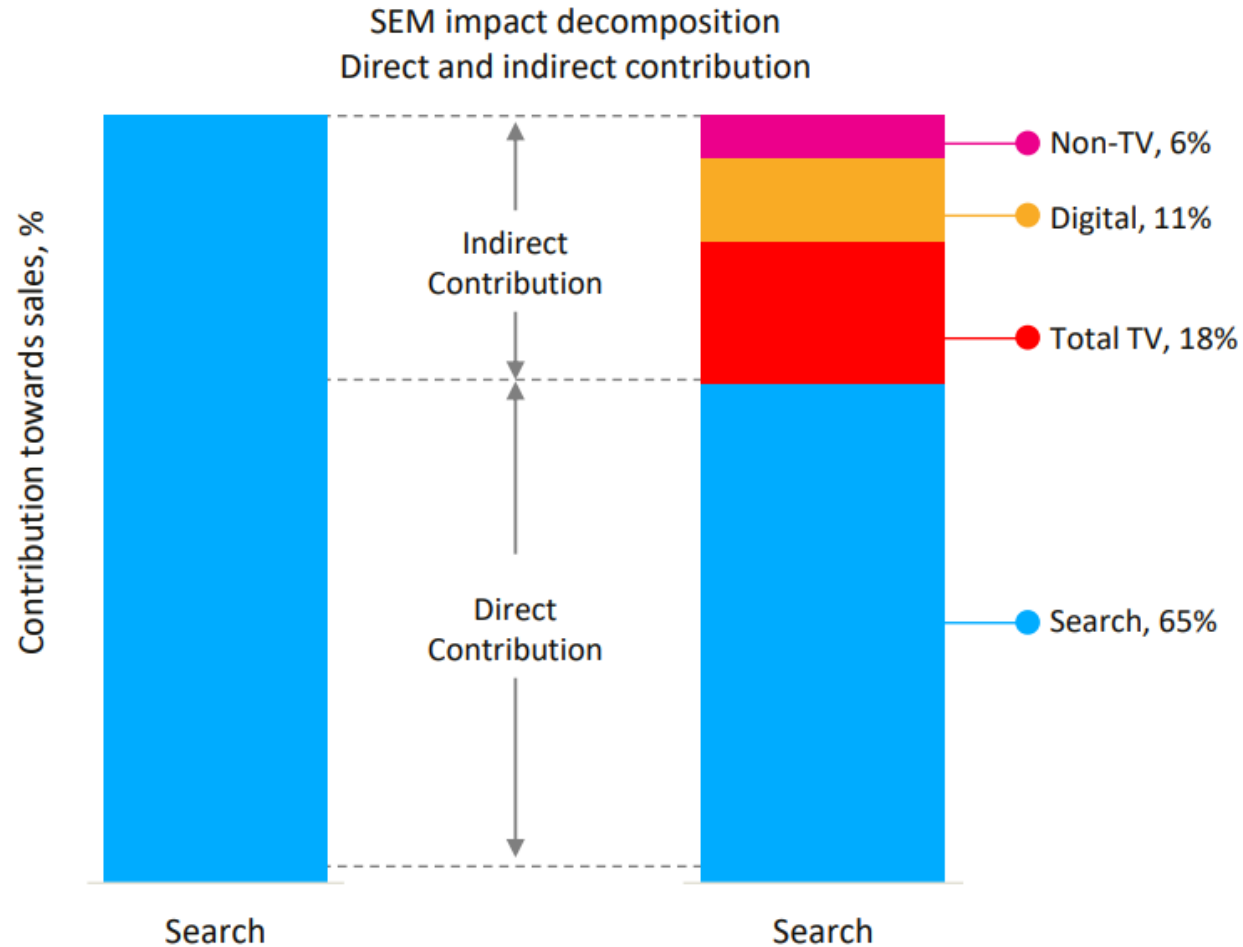
Reach



TURBO CHARGE SEARCH WITH TOTAL TV



■ Total TV is the number 1 driver of search

Total TV is fundamental to the sales demand derived from search contributing 18% towards the sales impact.



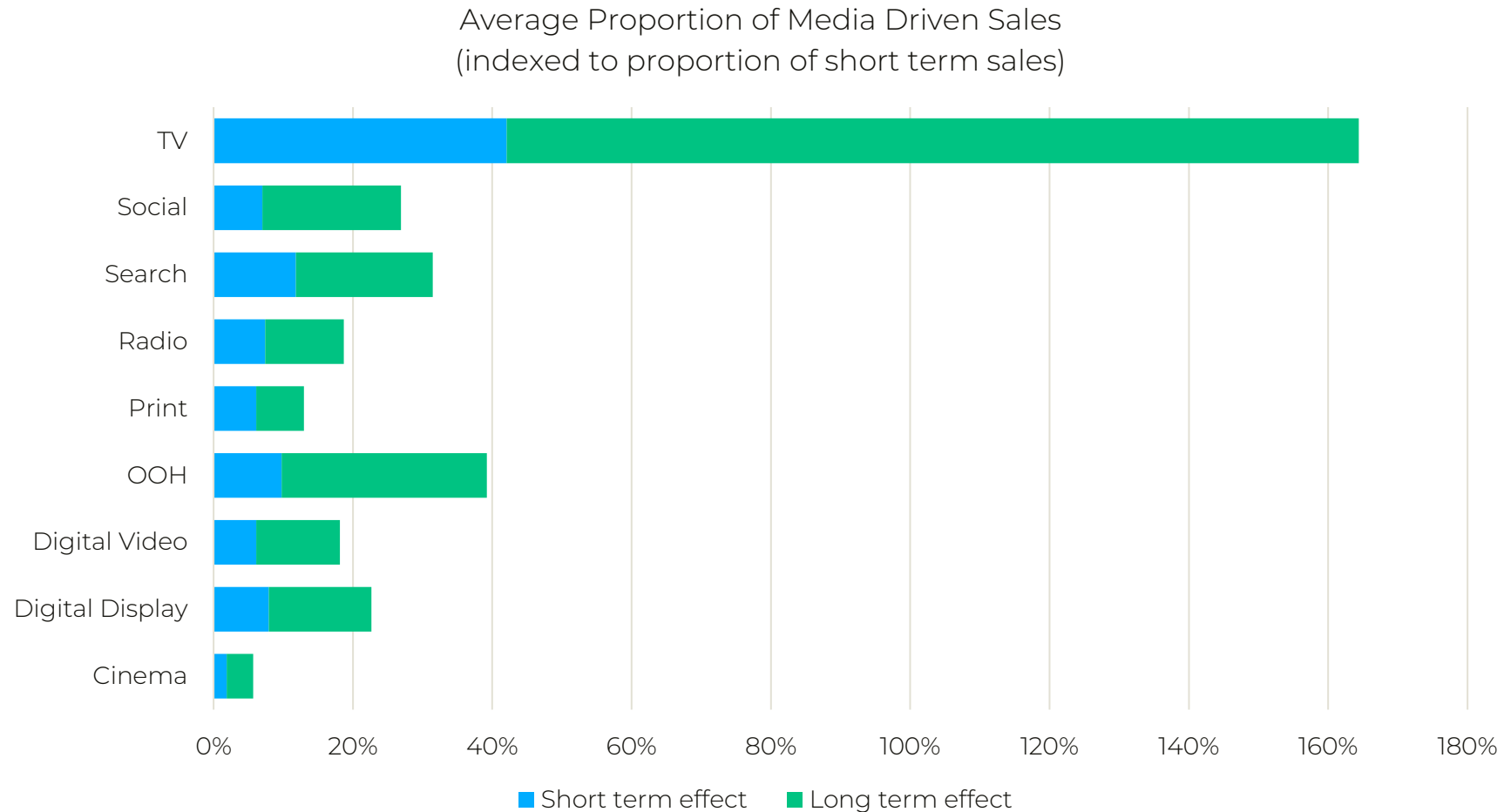


TV DRIVES
SHORT-TERM
PERFORMANCE
AND HAS THE
STRONGEST ROI
OVER THE LONG-TERM



Media channels vary in their ability to drive sales volume in the short and long term

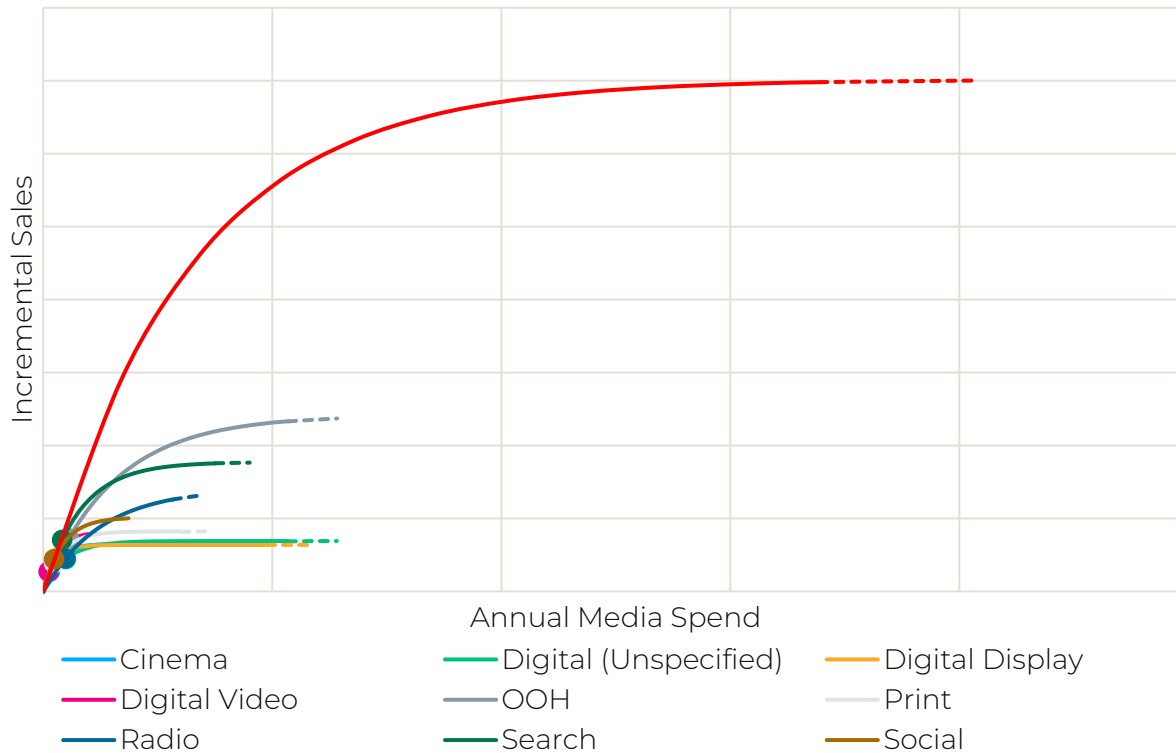
TV's ability to drive results for top (demand generation) and bottom (conversion) of the funnel far exceeds other platforms.



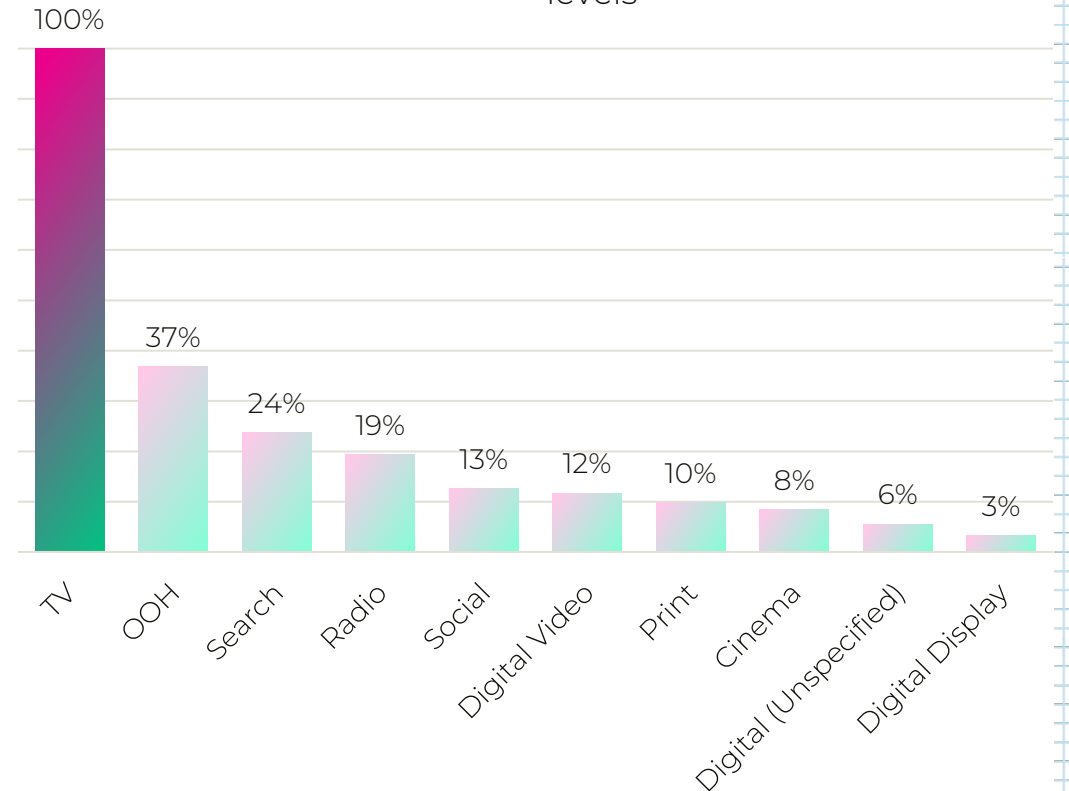
■ The rate of diminishing returns impacts the potential sales growth

The rate of return for TV diminishes more slowly than any other channel. As a result, you can invest more in TV and generate nearly 3x the growth opportunity from incremental sales compared to the next best channel (OOH).

Average Short-term Revenue Curves

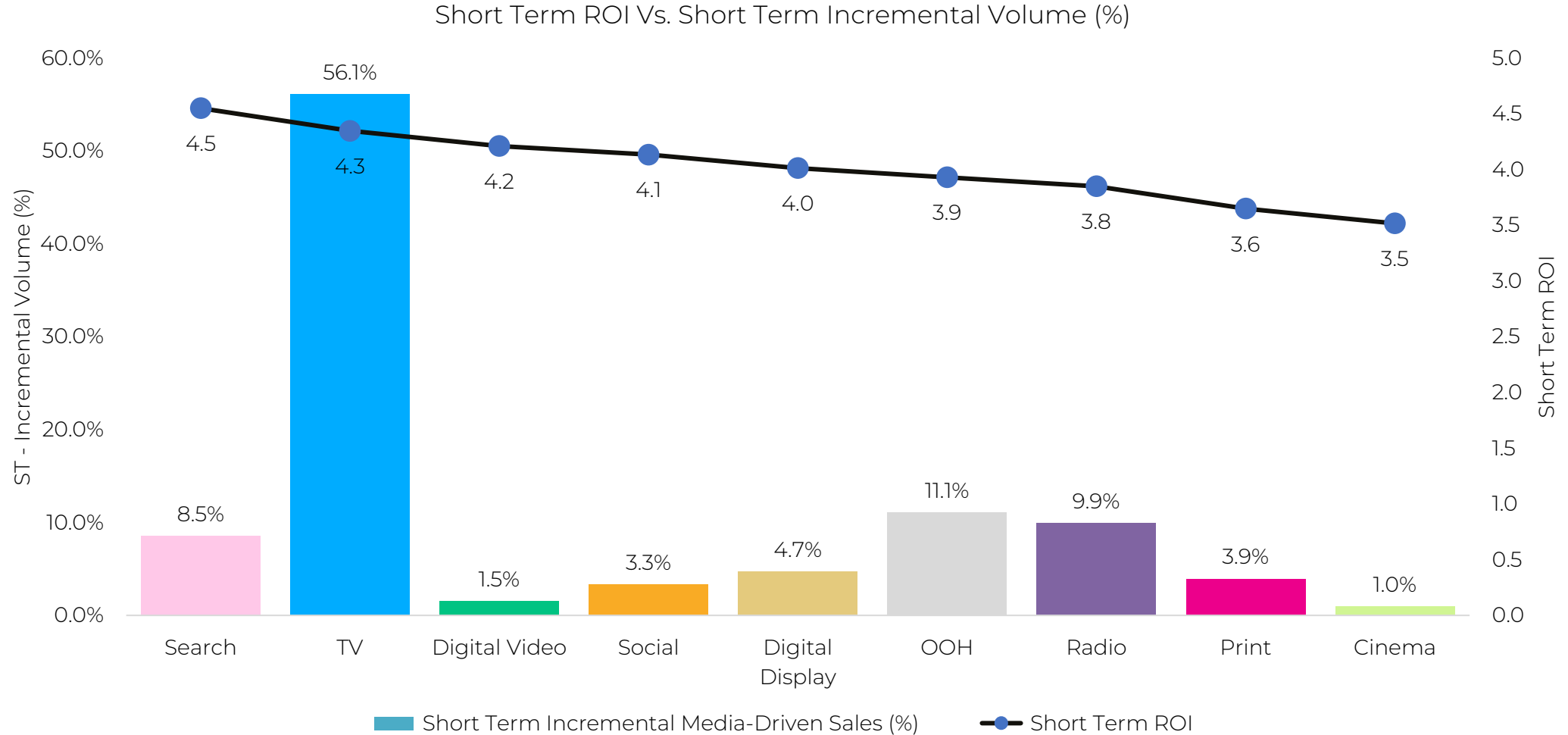


Indexed growth opportunity above current spend levels



Measuring success means measuring growth

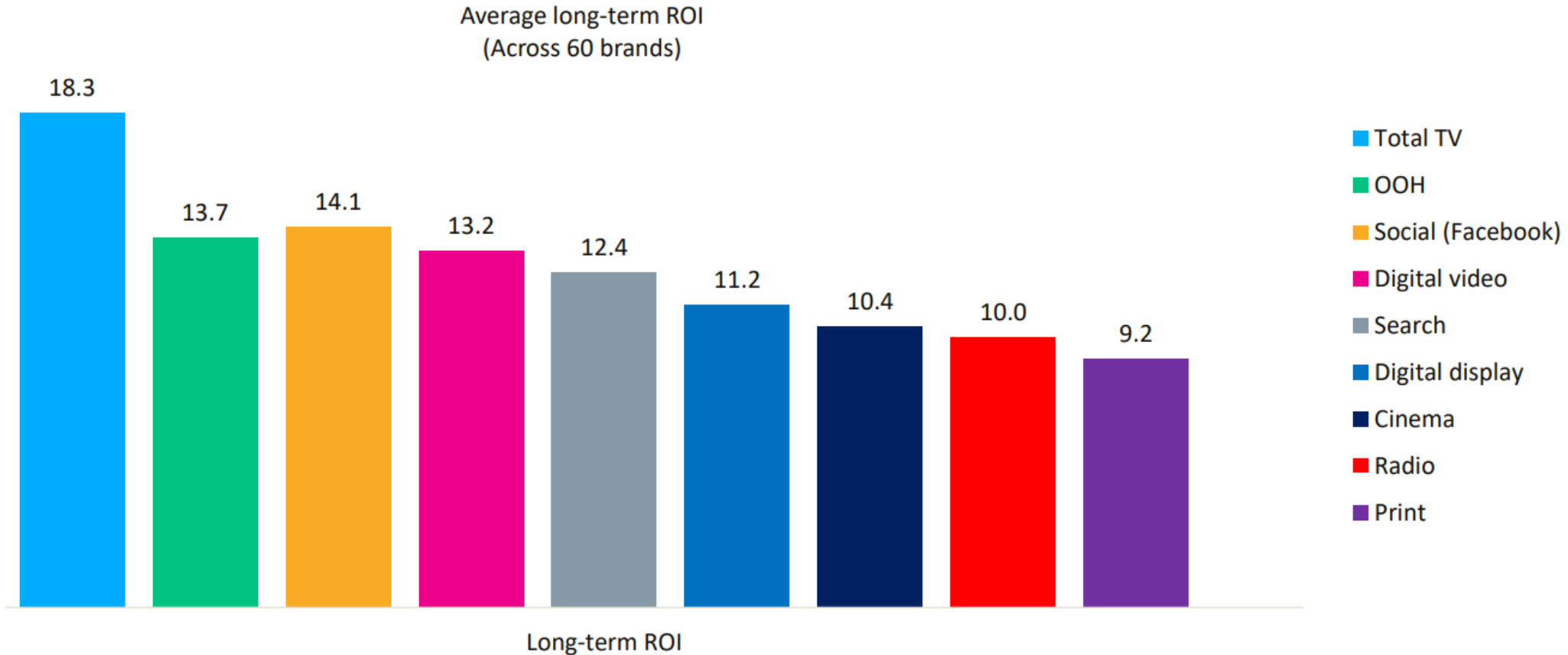
A strong ROI may not generate the strongest sales growth.



Source: Beyond ROI. Optimising the media mix for maximum business growth, The Payback Series: Edition 5, WPP/GroupM/Gain Theory.

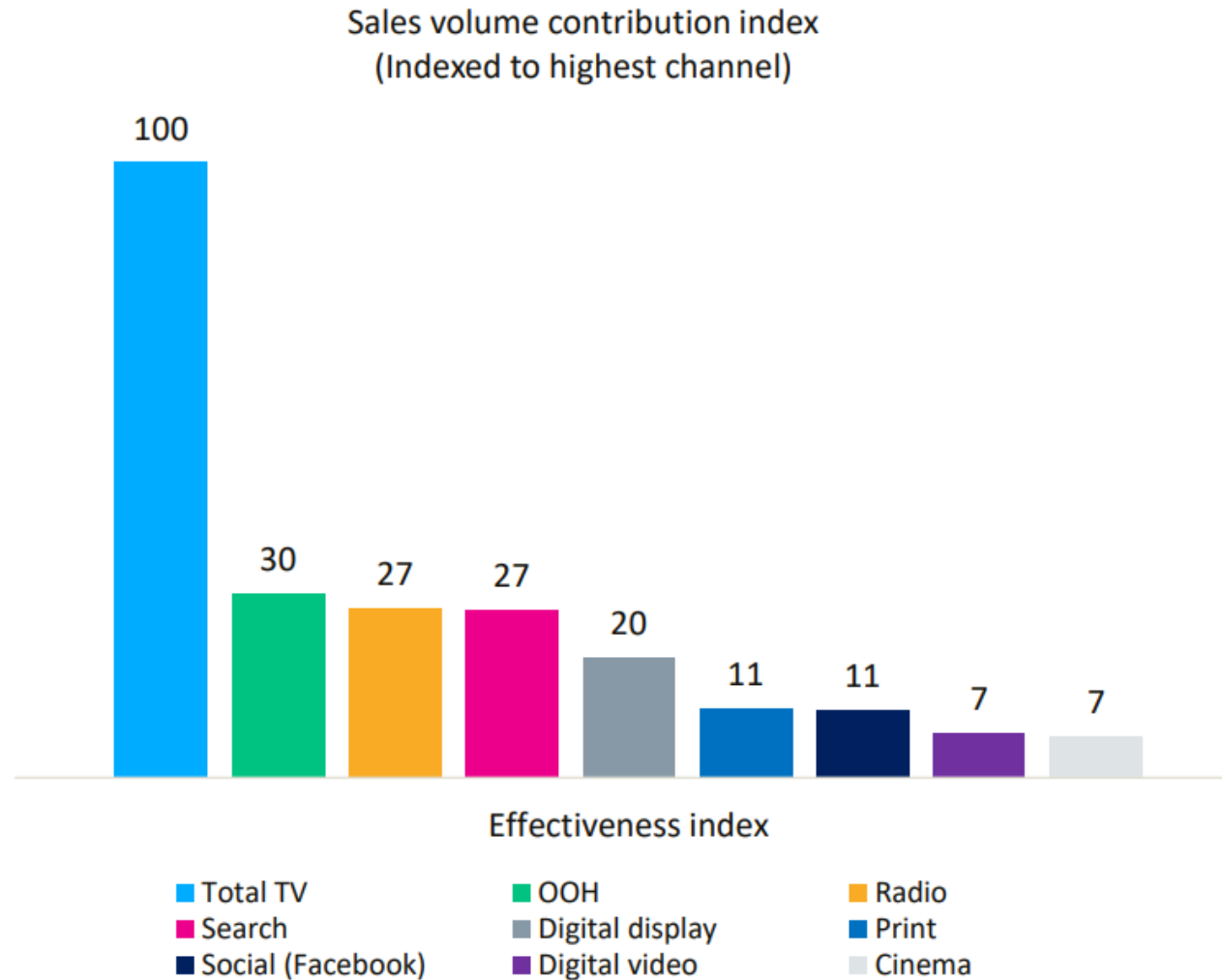
Invest \$1 in Total TV and get \$18.30 back, that's \$4.20 more than the next best channel

Total TV has been shown to generate effective sales returns while delivering long term outcomes.



■ Total TV drives 3x more sales volume than any other medium

Not only does Total TV deliver great ROI in the short and long-term, but Total TV also drives 3x greater sales volume than any other medium.



**Maintaining or upweighting TV
in the media mix drives better
brand and business outcomes.**

Keen to know more?

Download ThinkTV's reports.

