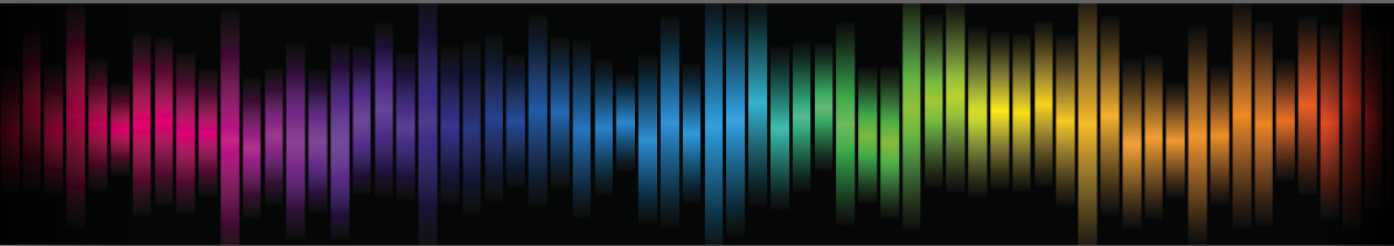




TAM Ireland  
Television Audience Measurement Ireland

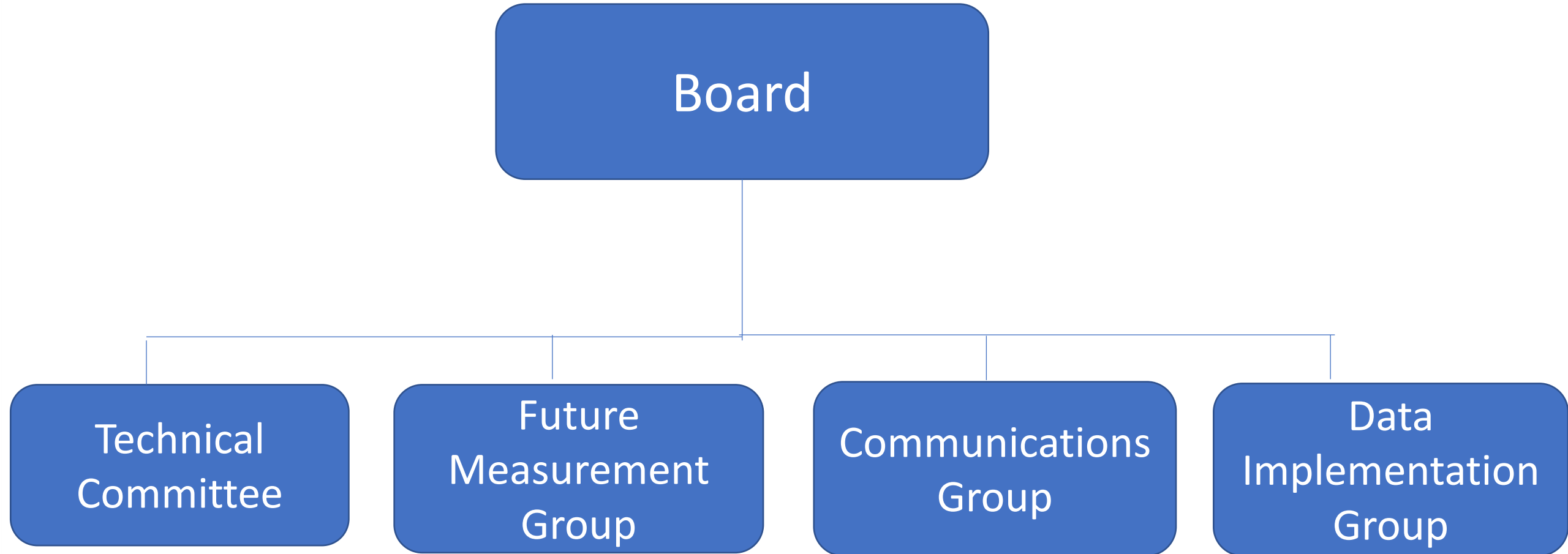


# Purpose

TAM Ireland strive, through best practice, to drive TV audience measurement forward. Our ambition is to measure all video content and provide precise viewership data on broadcast content across all platforms and we are committed to excellence vision and adaptability.



# Structure



# Agency reps

## Board

Alan Cox – Core Media

## Future Group

Frankie Carty - Core Media

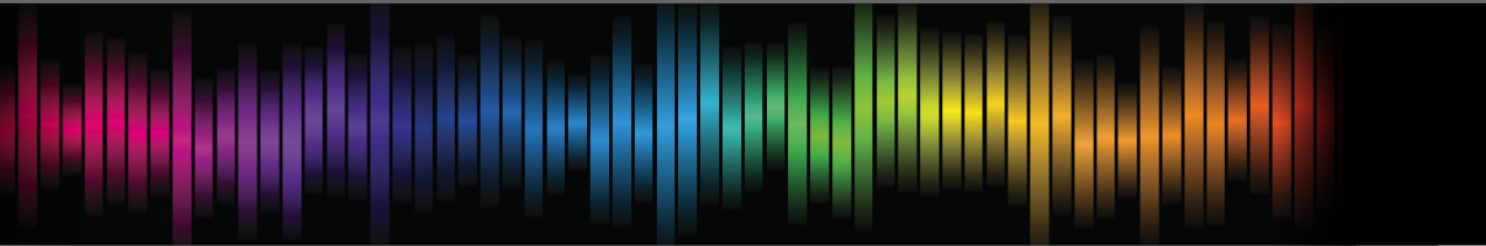
## Communications Group

Fiona Fagan - MediaBrands

## Technical Committee

Clodagh McGrath - OMD  
Neasa McDonagh - Group M  
Alan Cawley - MediaBrands  
Frankie Carty - Core Media  
Carl Flynn – Dentsu Aegis

# TV Advertising is transparent





# TV Advertising is Accountable

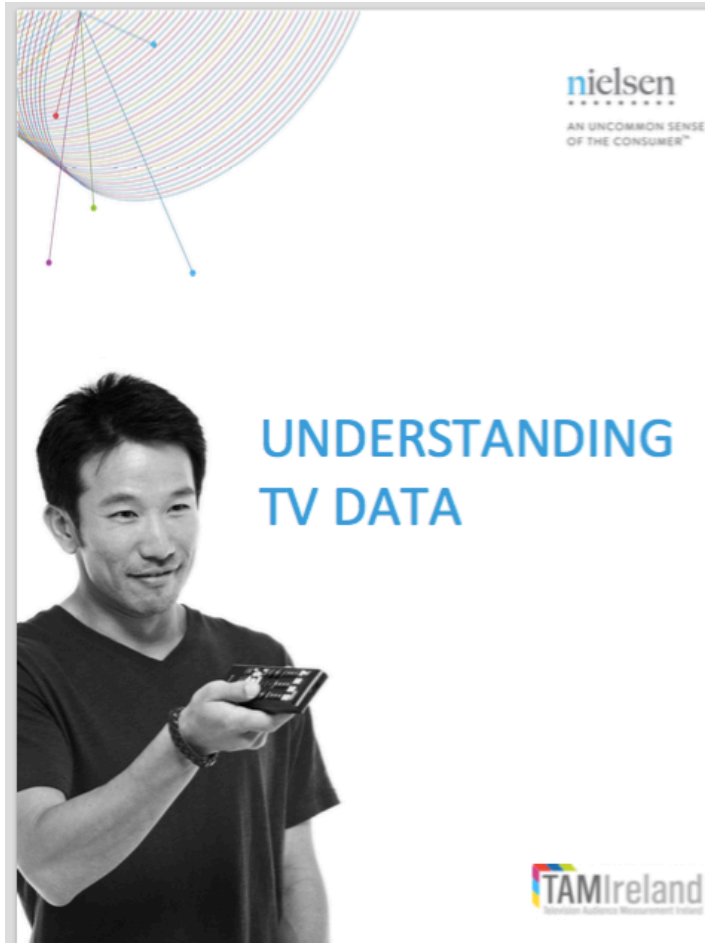


## TV Advertising is Accountable

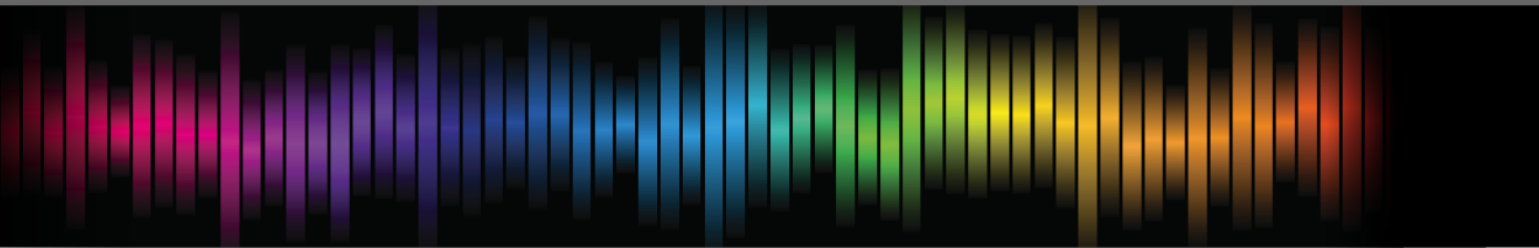
Advertisers are only charged for commercials that are viewed at normal speed



# Education Resources



Understanding TV Data  
Nielsen training





# Our Studies

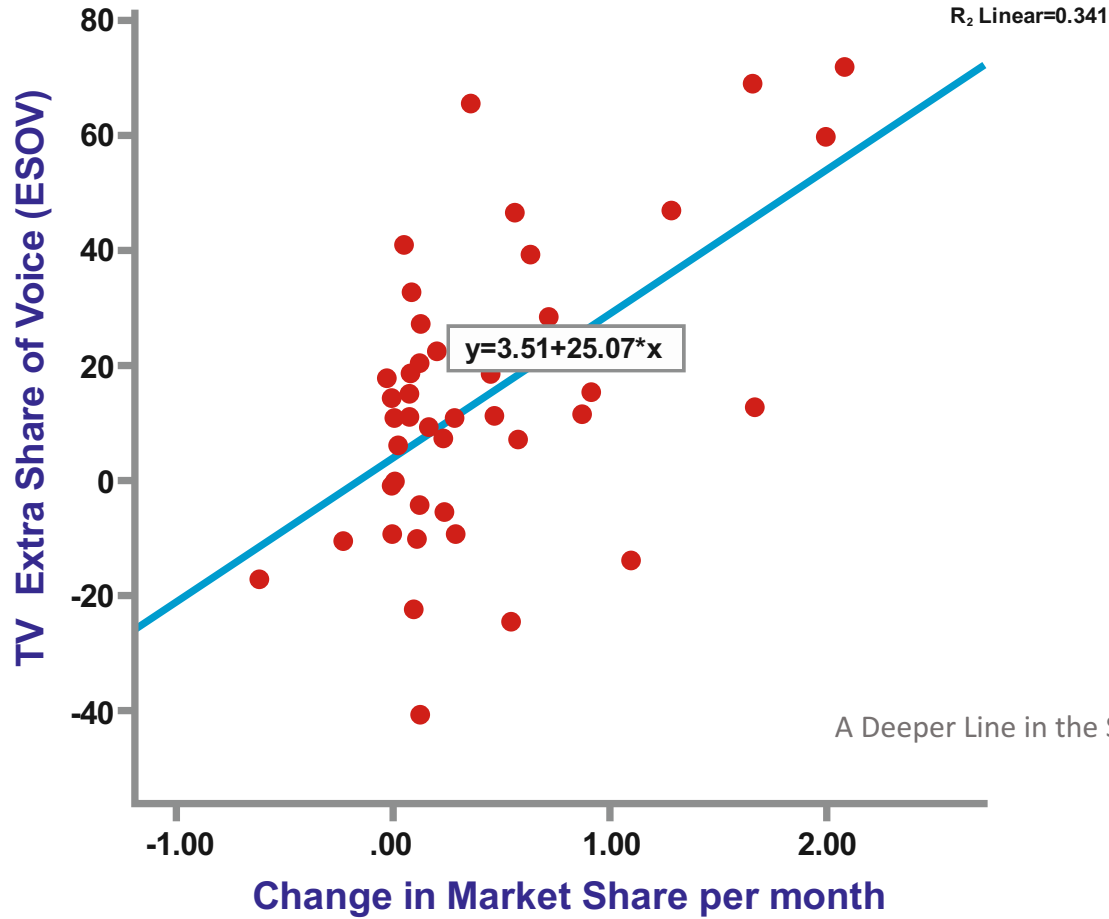
- Establishment Survey
- Lifestyle Survey
- Total Viewing Study
- Advertising Effectiveness – Meta analysis

## TV Advertising Works

TV advertising works.  
Return on investment, long-term brand builder and a myriad of studies old and new that prove TV advertising is effective as a generator of profit and for growing market share.



# Extra TV Share of Voice Strongly Correlated with Share Growth\*

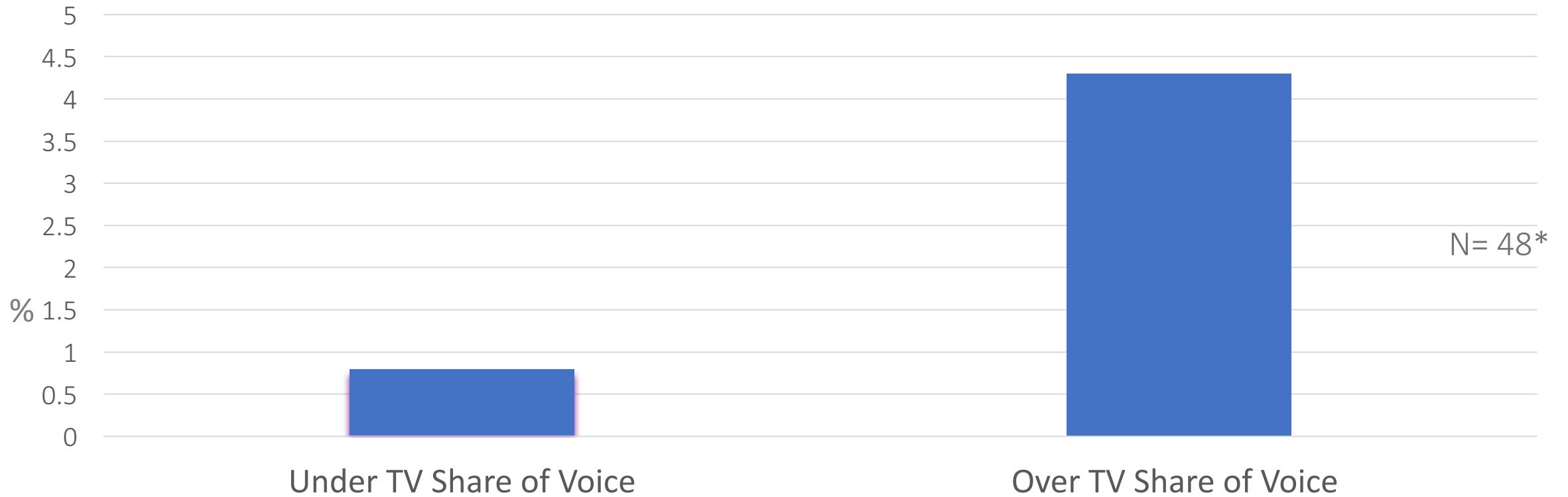


Correlation 58%  
Significance 99%

A Deeper Line in the Sand- Updated Meta- Analysis Evidence Karen Hand, 2017

N= 46\*

## Value Share Change (%)

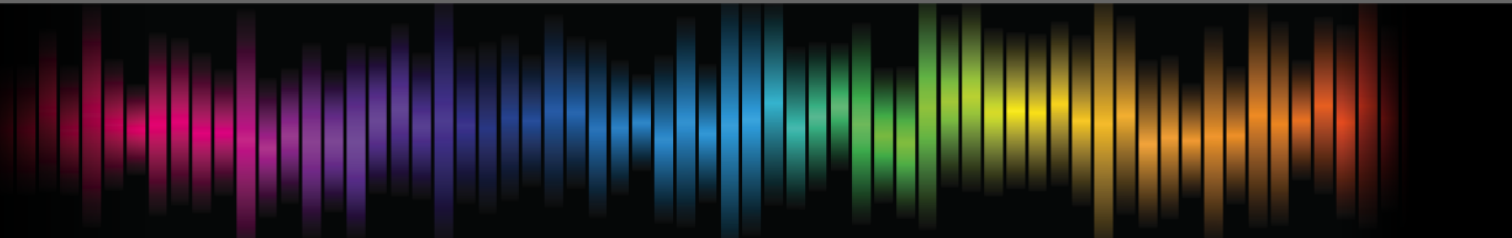
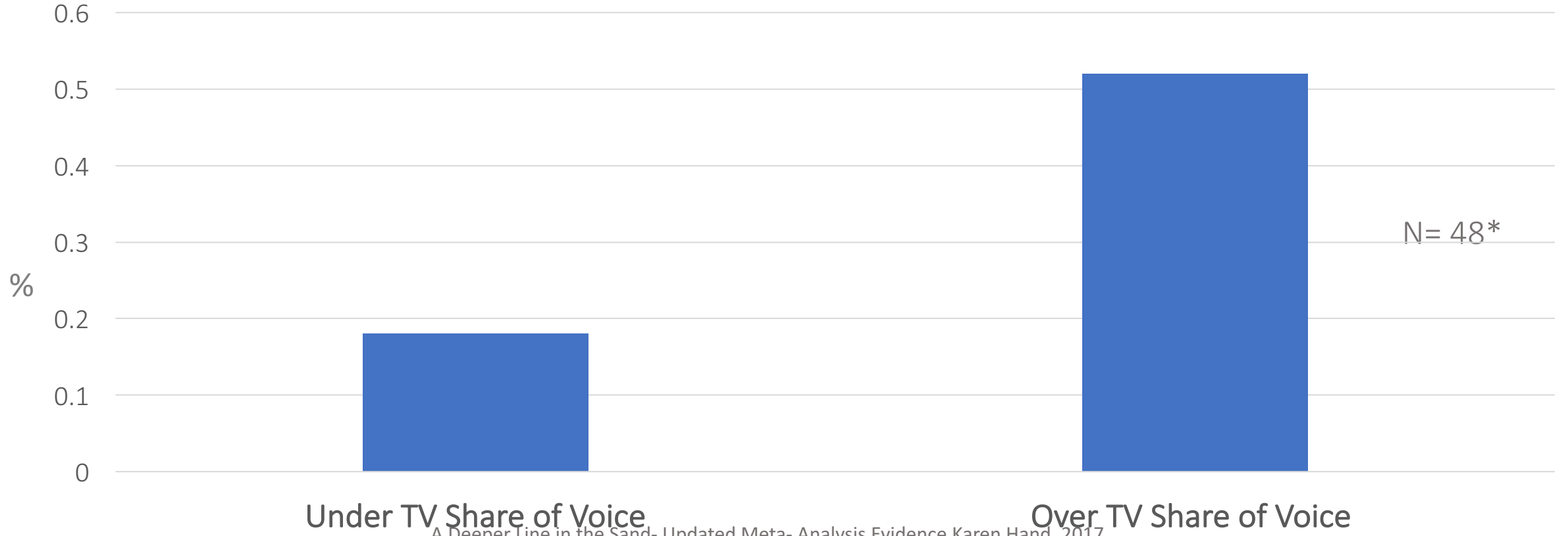


A Deeper Line in the Sand- Updated Meta- Analysis Evidence Karen Hand, 2017

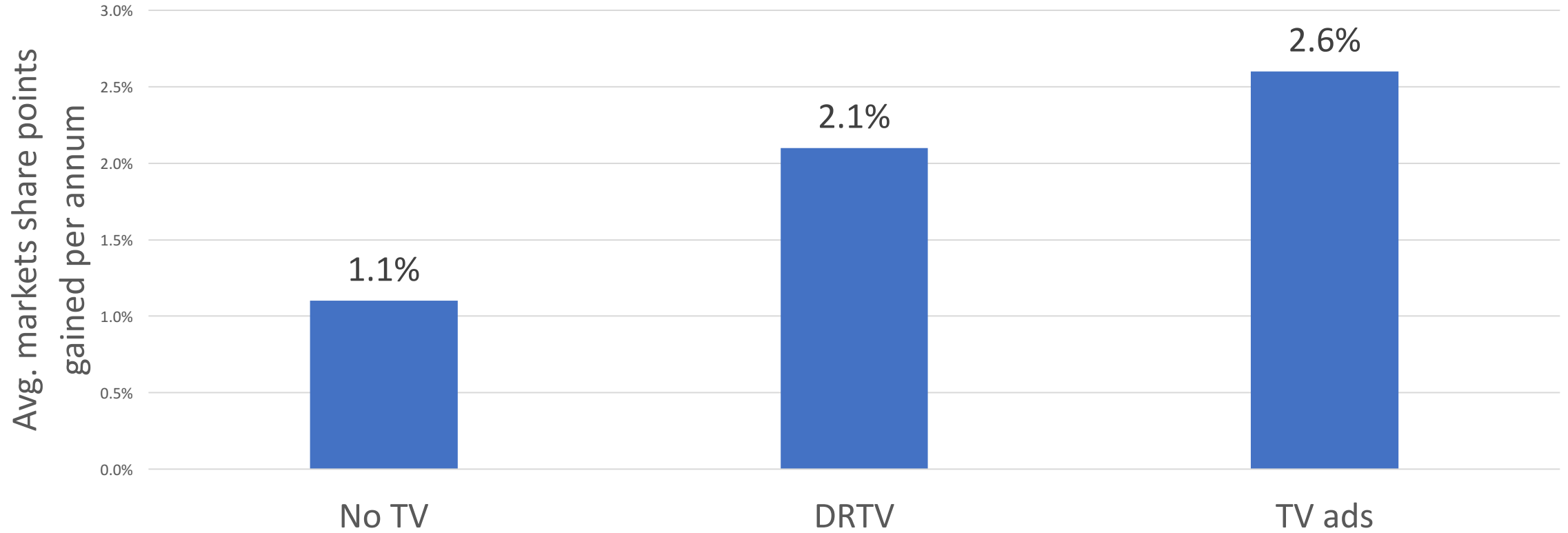


# Relative Over-Investment in TV linked to Value Share/Month Growth

## Value Share per Month Change (%)



## TV is best for market share growth



Source: Binet & Field 2016

Base: 2012-16 cases

## TV Advertising is Trusted

TV is the most trusted medium for advertising (Thinkbox Ipsos & Future Foundation)



## TV Advertising has Heart

TV Advertising has Heart – in terms of emotional engagement with consumers, no other medium matches TV.

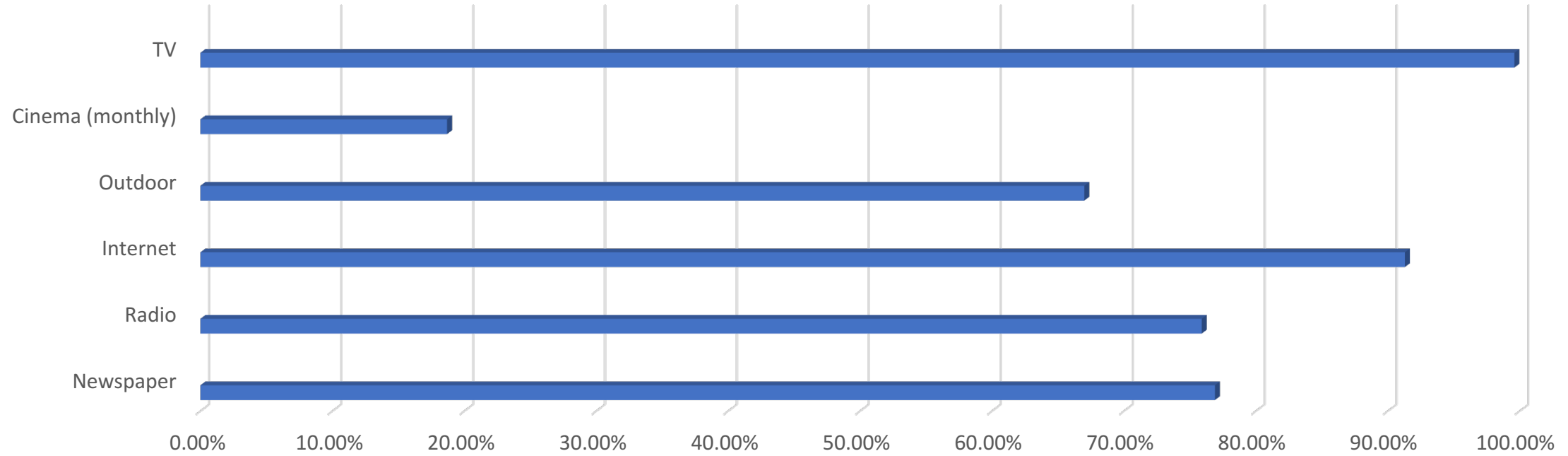




## TV Advertising Has unrivalled reach



## TV reaches more people each week than any other medium



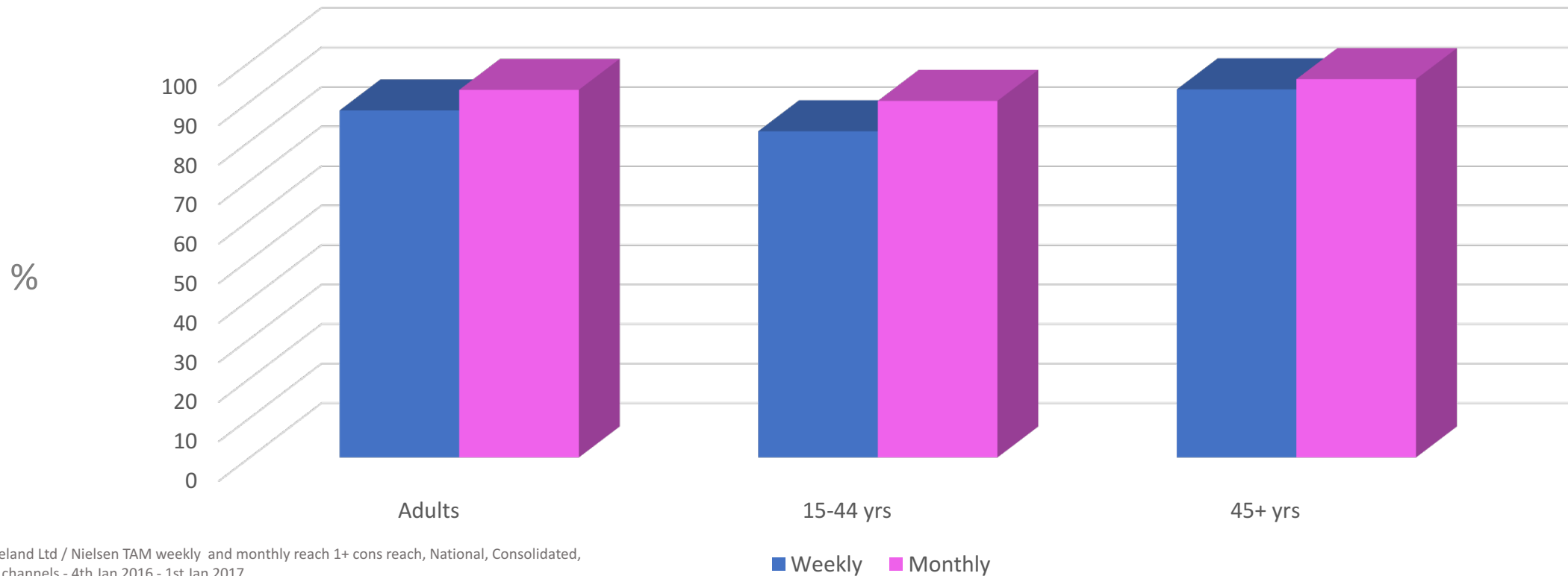
Source: Kantar Media ROI TGI

## TV Advertising Works



## Commercial TV delivers mass markets

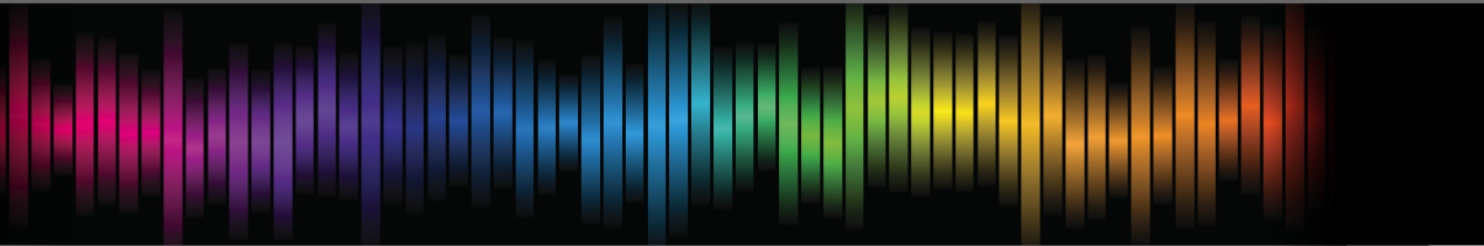
### Average Weekly and Monthly Reach



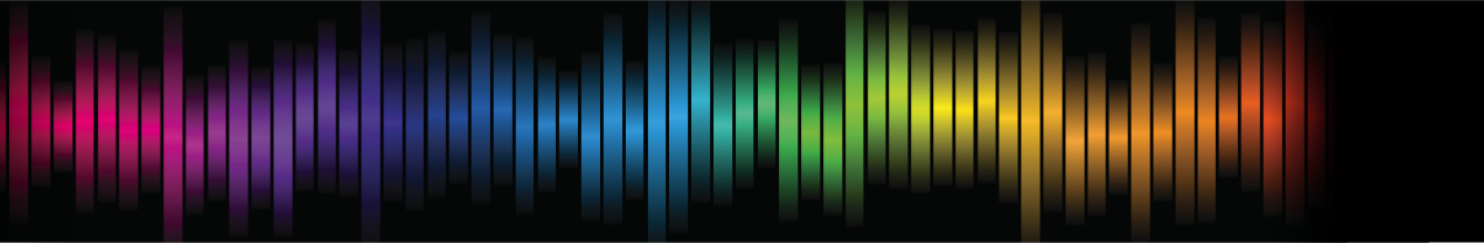
Source: TAM Ireland Ltd / Nielsen TAM weekly and monthly reach 1+ cons reach, National, Consolidated, all commercial channels - 4th Jan 2016 - 1st Jan 2017



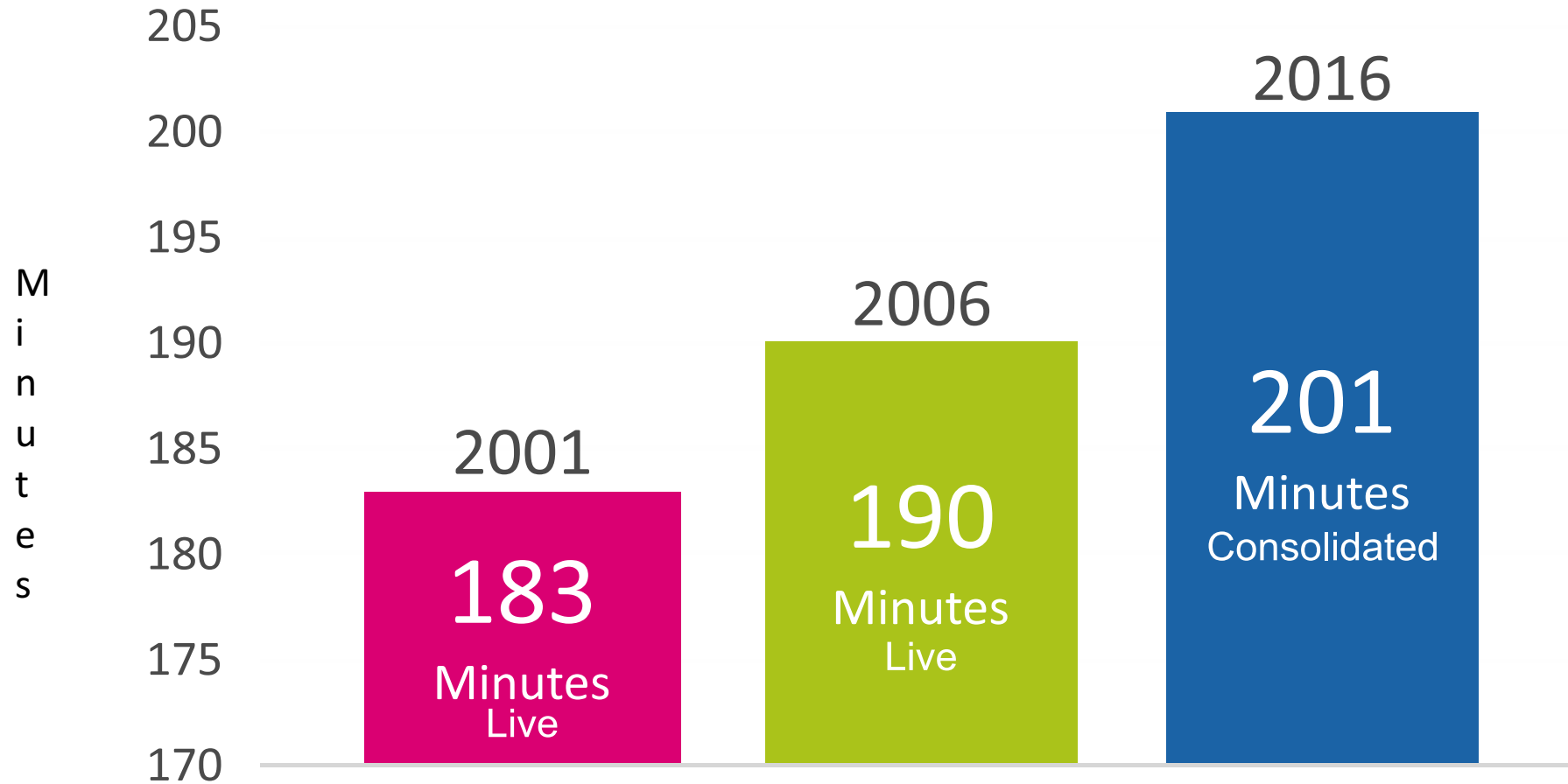
The average  
TV campaign  
gets  
16.38 million  
views



## TV Advertising Works

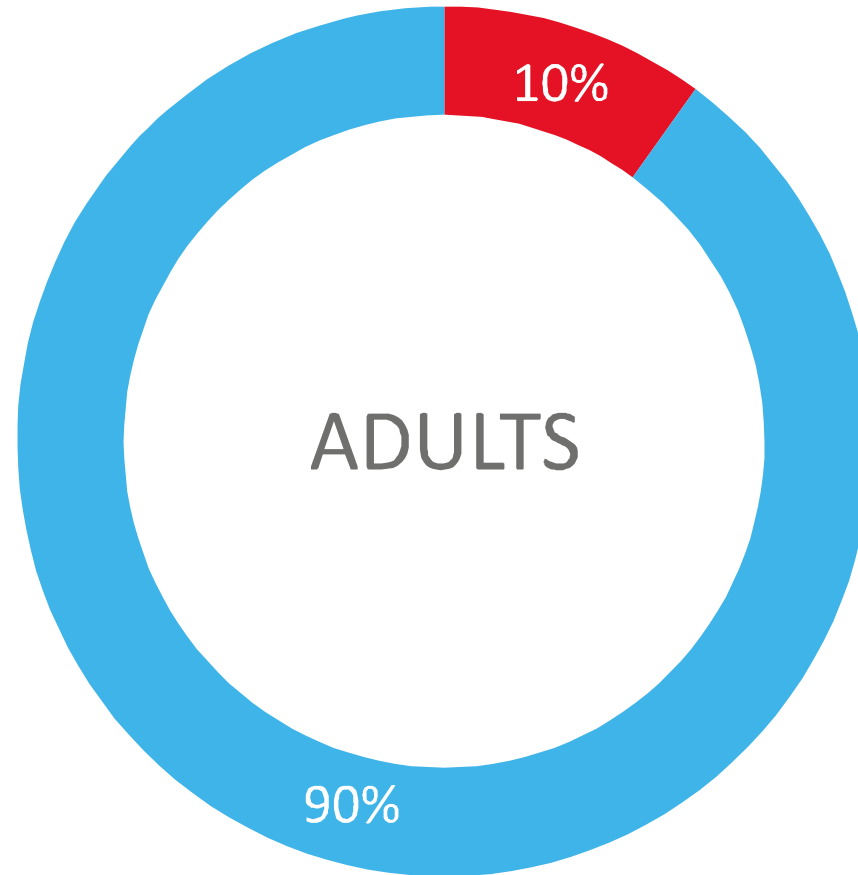


## TV Viewing is up 11 minutes in a decade



Source: TAM Ireland Ltd / Nielsen TAM / Av mins. per person, Total TV, Consolidated, National

The vast majority of viewing is to Live TV



Average Time Spent Viewing 2016

■ Time-Shifted ■ Live

Source: TAM Ireland Ltd / Nielsen TAM / Av mins, Total TV, Consolidated, National



**It Works**

**It's Transparent**

**It's Accountable**

**TV is the Most Trusted Medium**

**TV Delivers Cover and Cost Efficiency**

**Time Spent Viewing**

**TV has heart**

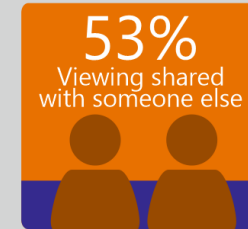
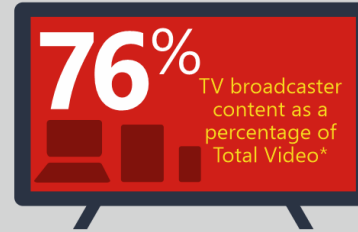
# Website

- **Nickable Slides**
- Monthly/Quarterly/Annual TV overviews
- ES updates – Who Owns What
- Ad hoc studies – Adland v Tvland, Social Media study,
- Total Viewing study
- Data Integration

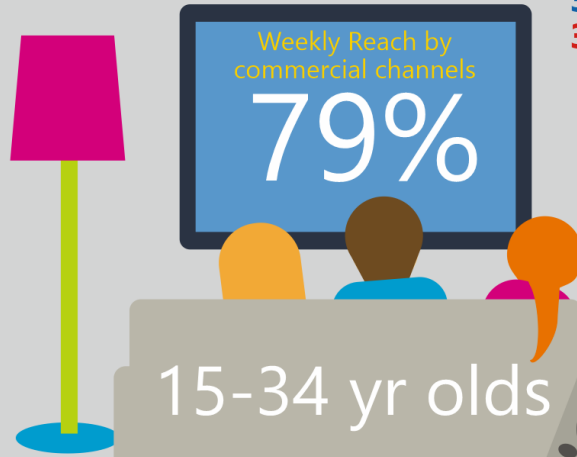
# 15 - 34 Year Olds

Total TV consumption per day

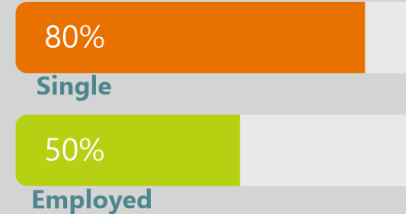
2 hours  
10 mins



45% claim to enjoy the ads as much as the programmes  
30% consider themselves TV Addicts  
30% enjoy the ads and talk about them afterwards



TV Universe  
1,015,000

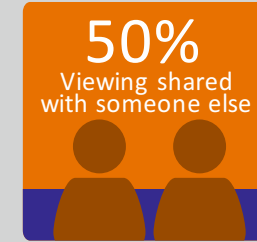
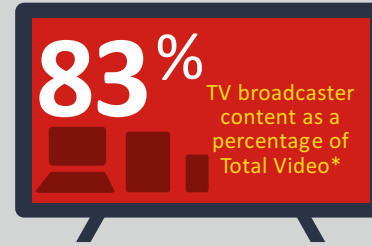


\* Source: IPSOS MRBI - Total Viewing Study 2016  
Source: TAM Ireland/Nielsen (Nat consolidated, all day, all week, avg mins p.p., weekly reach; Lifestyle/ES)

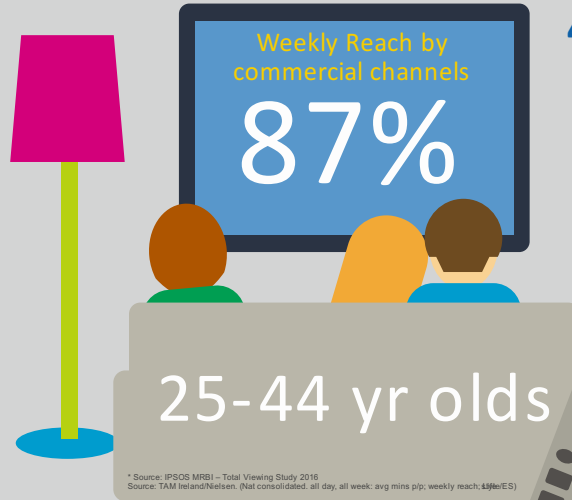
# The Grown Ups

Total TV consumption per day

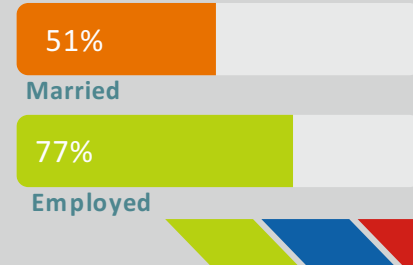
**2 hours 45 mins**



**33%** claim to be TV addicts  
**43%** enjoy the ads as much as the programmes



TV Universe  
**1,223,000**

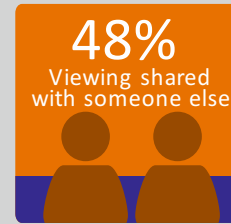
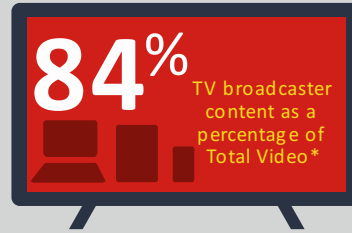


\* Source: IPSOS MRBI - Total Viewing Study 2016  
Source: TAM Ireland/Nielsen. (Nat consolidated, all day, all week: avg mins p/p; weekly reach: 45/46/ES)

# The Mamas & Papas

Total TV consumption per day

**3 hours**  
**13 mins**

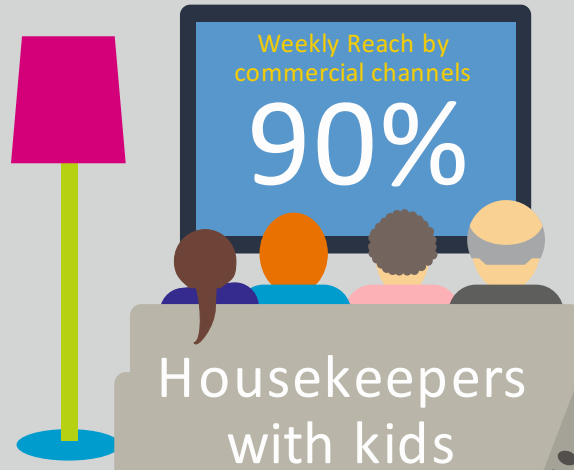


**28%**  
like to be in charge of the remote control

**30%**  
enjoy the ads and talk about them afterwards

**35%**  
consider themselves TV addicts

TV Universe **532,000**



Average Age **39.5**

Average no. of Kids **1.9**



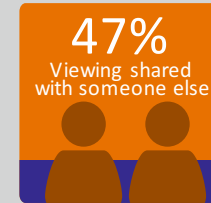
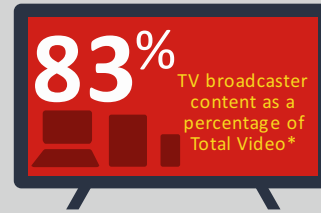
\* Source: IPSOS MRBI - Total Viewing Study 2016  
Source: TAM Ireland/Nielsen. (Nat consolidated, all day, all week; avg mins p/p; weekly reach; 49yo/ES)



# The Earners

Total TV consumption per day

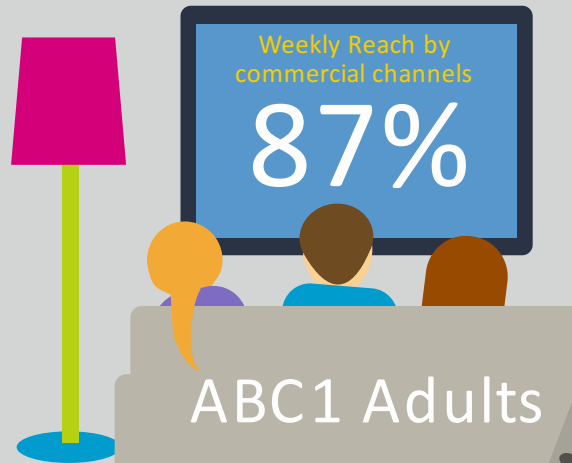
**2 hours 35 mins**



**41%** consider themselves to be TV addicts

**36%** claim to enjoy the ads as much as the programmes

**31%** claim to enjoy the ads and talk about them afterwards



TV Universe **1,370,000**



Average Age **42.7**



\* Source: IPSOS MRBI - Total Viewing Study 2016  
Source: TAM Ireland/Nielsen. (Nat consolidated: all day, all week: avg mins p/p; weekly reach: 49/16/ES)

# VISTA

## Video Integration Strategy for a Total Audience

### The Background

The Future Group was formed about 4 years ago – made up of researchers from all of the broadcasters plus representatives from an ad agency and digital agency. They were tasked with understanding and keeping abreast of measurement initiatives and developments around the world.

Technology as we know is developing at a rapid pace but the measurement of the consumption of that technology naturally lags behind its growth and is complex.

TAM Ireland have commissioned a Total Viewing Study on 4 occasions since 2012. This trends all viewing of all formats across all devices. This is showing increasing levels of viewing outside of the TV set which we are not currently equipped to measure

The focus of the Future Group is to deliver cross platform measurement: the following pages outline the strategy adopted for delivering this.

Source Thinkbox

# Website

- Access to all Thinkbox downloads
- Latest News
- Monthly Top 10 programmes x channel
- Universe Updates
- Explanatory Videos

A 4 STAGE APPROACH TO  
MEASURING VIEWING ACROSS  
ALL DEVICES AND FORMATS

