

# REVIEW 2017



 **TAM Ireland**  
Television Audience Measurement Ireland

## WHO IS TAM IRELAND

The members of TAM Ireland are RTE, TV3, TG4, eir Sport, Sky Ireland, Channel 4, Viacom International Media Networks and the main Irish media buying agencies. We commission Nielsen TV Audience Measurement to carry out the actual measurement service.

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.



# REVIEW

## 2017

groupm

TG4



OmnicomMediaGroup



Javelin Group

HAVAS  
M E D I A

VIACOM  
INTERNATIONAL  
MEDIA NETWORKS

dentsu  
AEGIS  
network

▶ PIERCEMEDIA



core™

RTE

### Our mission is:

To provide precise viewership data and promote the power of television with a commitment to excellence, vision and adaptability.

## Welcome to our review of TV in 2017

2017 was a really progressive year in TAM Ireland as we undertook a number of new projects.

### VISTA

We delivered fully on phase 1 of VISTA by producing our A/V Data Solution 2017 and we were delighted to win the Marketing Society Research Excellence Award for Analytic Impact with this work.

Included in our A/V Data Solution is data from our annual Total Viewing Study 2017 (IPSOS MRBI) which shows Irish Adults total viewing now accounting for 3 hrs 55 min per day 83% of which is on the TV set. TV is the cornerstone of our at-home entertainment. The opportunity to view TV across multiple devices at a time of your own choosing means total viewing continues to increase.

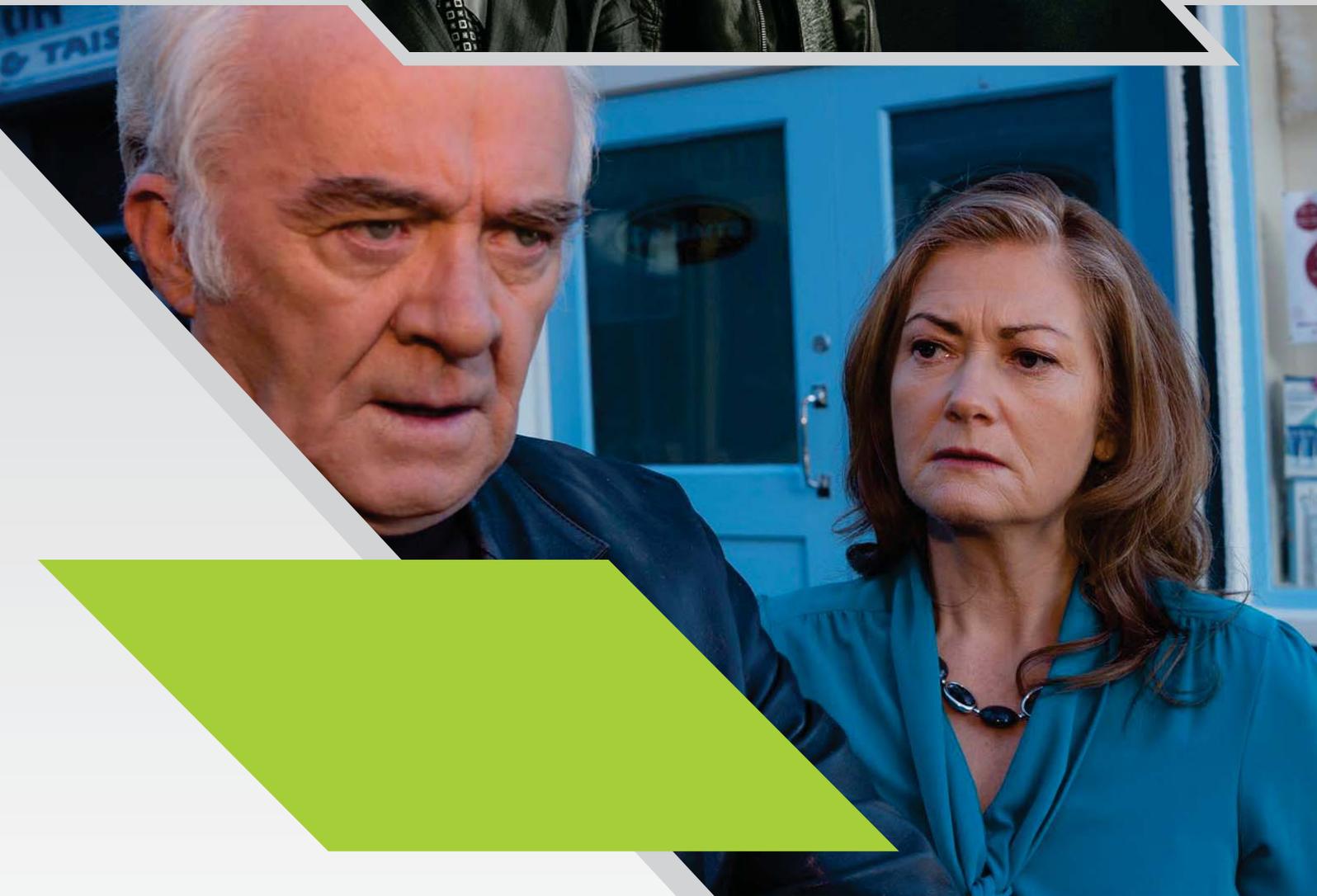
### Plannervision

We also held our first ever PlannerVision event in September where agencies nominated their rising stars on their planning teams to attend the event.

One of the highlights from Plannervision was the fantastic panel of clients featuring Damien O'Neill Head of Marketing from Allianz, John Tolan Marketing Director at Boyne Valley Group and Geoff Scully Managing Director Littlewoods Ireland, all of whom presented fantastic insights. John explained that his core objective is to reach new consumers by engaging them, saying "we advertise to cause some change in how people who don't currently use our brand, feel about it. TV does the job very well of reaching people who don't currently buy into our brand."

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He also spoke about moving from looking at creative output and how it makes a consumer THINK about a brand, to how the advert makes a consumer FEEL about a brand. "Advertising really works when it gets to the heart and not to the head."

Geoff and Damien spoke passionately about the need for media and advertising agencies to get to know the consumer that their client is trying to target explaining that "the more you know that can add to the understanding of our customer, then the better will be your decisions in terms of purchasing media on your clients behalf."

Geoff spoke about how brands are looking for a deeper personal insight into who it is they are talking to, and not just information about demographics.



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### **TAM Ireland Website**

We also launched a totally revamped website this year and you can find it in all its glory at [tamireland.ie](http://tamireland.ie). All the industry news can be found on it, complete with nickable slides, an education section as well as all the latest viewing trends.

### **Content continues to be King**

Of course TV is driven by great content and 2017 delivered this in spades. Sport as always played a starring role this year. The weather, in particular Storm Ophelia drove record daytime audiences as people turned to news on the television to keep up with the storm's path.

We also saw the continuance of great drama, Game of Thrones on Sky, to RTE's new legal drama Striking Out. Big entertainment shows like Channel 4's Great British Bake off and TV3's I'm a Celebrity all contributed to yet another triumphant year for the Irish TV industry.

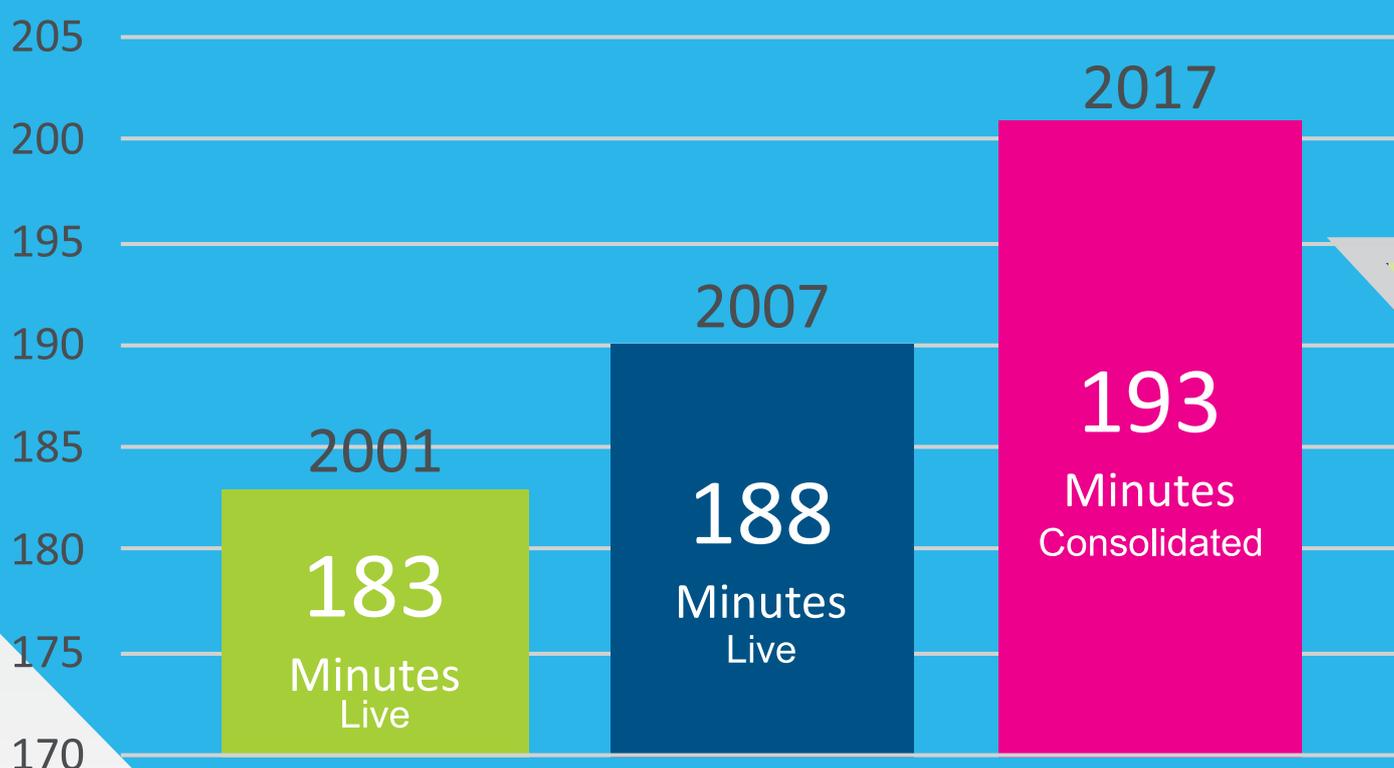
We look forward to another year of entertaining and engaging TV in 2018



## THE STATS - TV Viewing is Stable

Consolidated TV viewing accounted for 3 hours, 13 minutes a day of the average viewer's TV consumption in 2017 – 5 minutes a day more than 10 years ago.

This is a story of remarkable stability, considering the changing AV consumption habits in Ireland and the different viewing options available

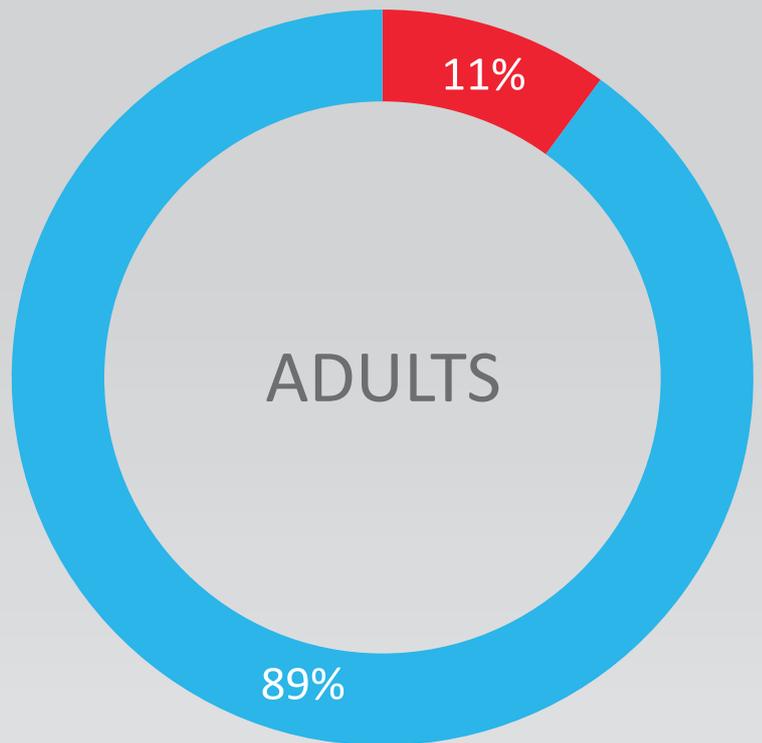


Source: TAM Ireland Ltd / Nielsen TAM / Av mins. per person, Total TV, Consolidated, National

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Live TV' (watching TV at the time of transmission), still represents the vast majority of consumption.

In 2017 the average Irish Adult in a TV home viewed 2 hours, 51 minutes of live TV on a daily basis and 21 minutes of time-shifted content on TV sets. This resilience of live TV is driven by great content that is best consumed live such as sporting, news and current affairs programmes.



■ Time-Shifted   ■ Live

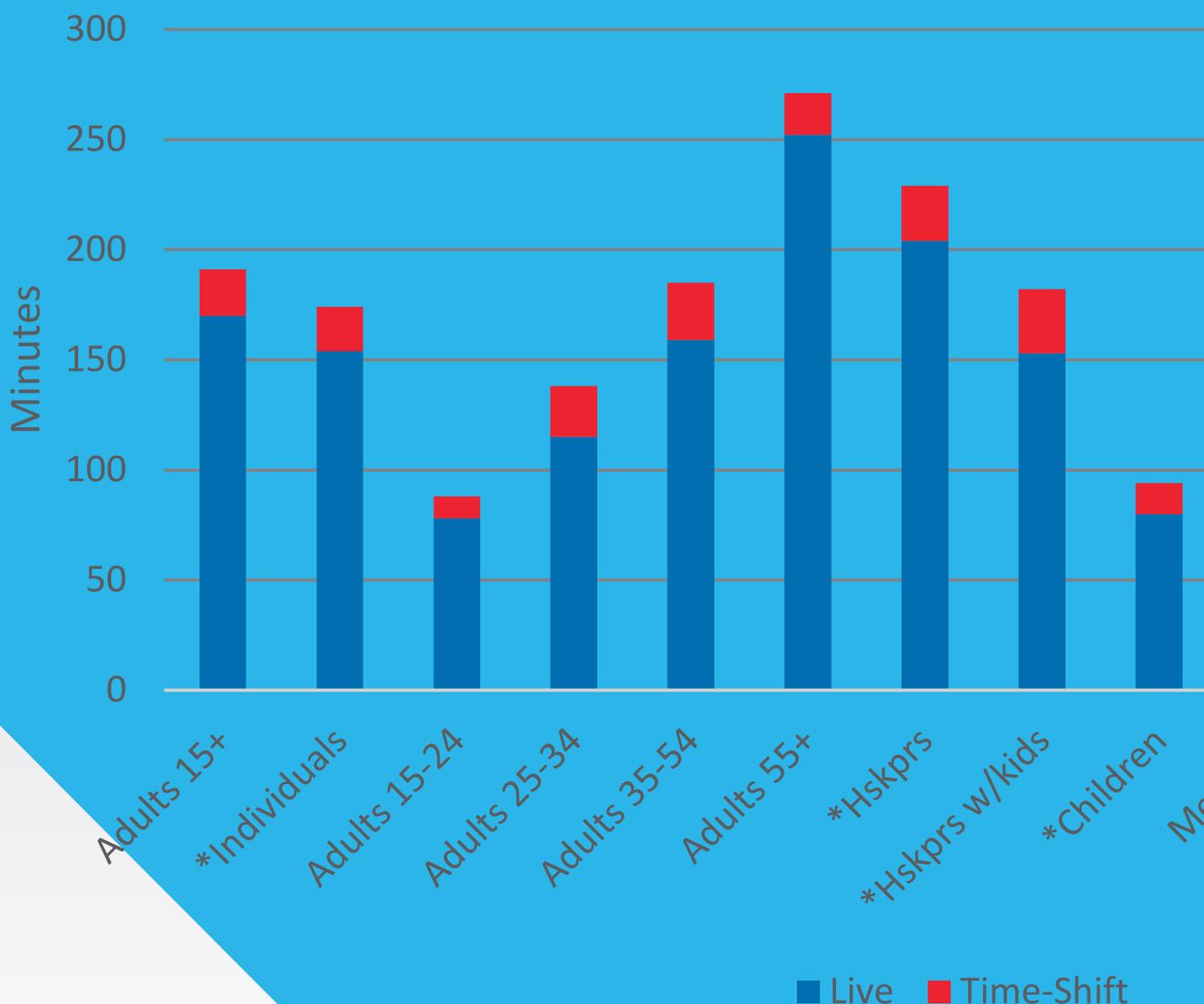
Source: TAM Ireland Ltd / Nielsen TAM / Av mins, Total TV, Consolidated, National



# THE STATS-The vast majority of viewing is to live TV

Across all key demographics the vast majority of viewing time is to live TV.

## Average Time spent viewing per day



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Figures of course vary by age; however for adults aged 15-24, watching live TV is still nearly two thirds of their daily AV consumption of 116 minutes.

Notably, these average daily 'time spent' viewing figures are based on an average of all adults in a TV household

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

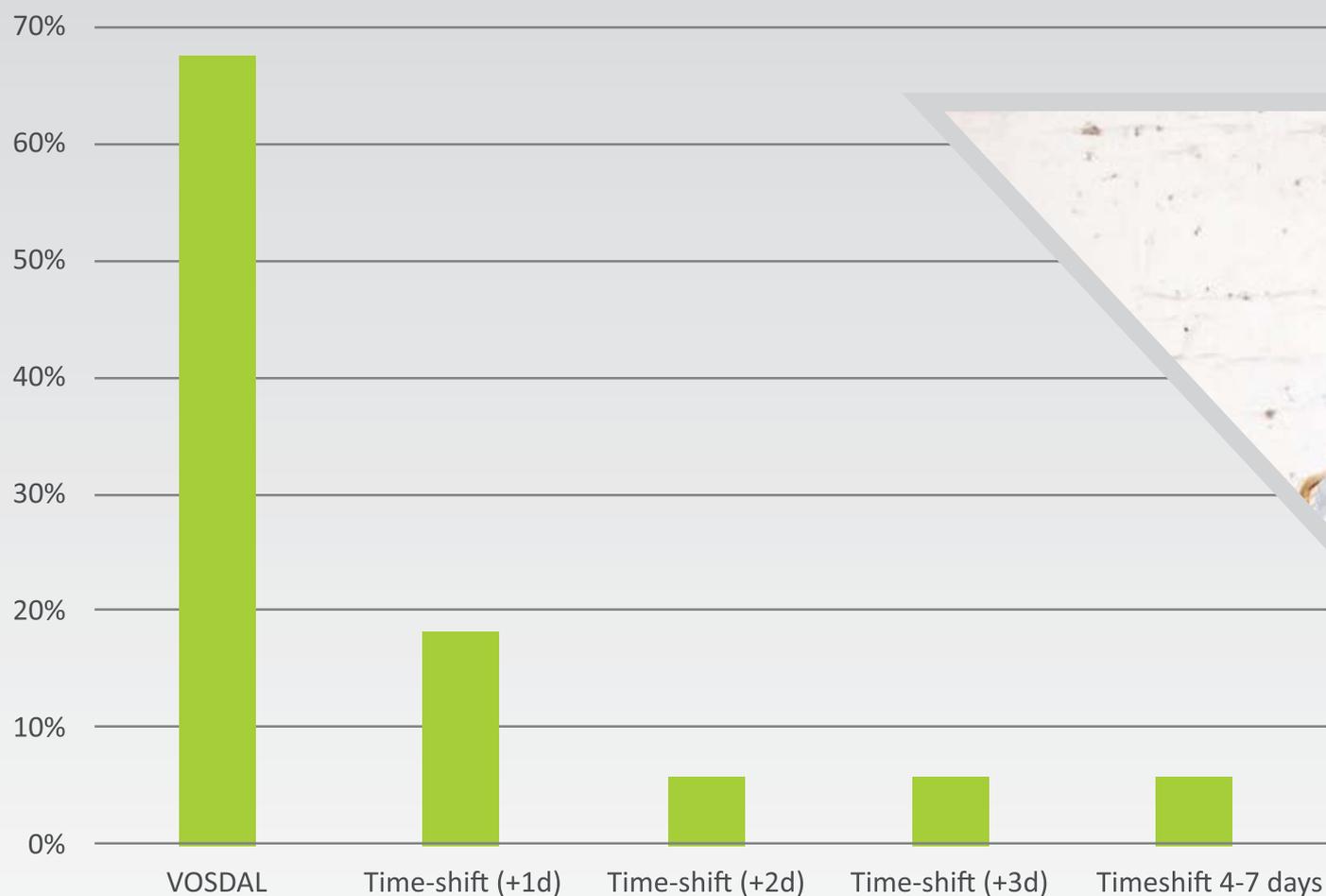


# THE STATS - People playback promptly-almost 90% within 2 days

When people do record TV they tend to watch it very quickly.

This shows their desire to stay close to the live schedules. The rise of social media may have an influence on this as the risk of online spoilers makes watching live TV even more important.

Playback of time-shift viewing



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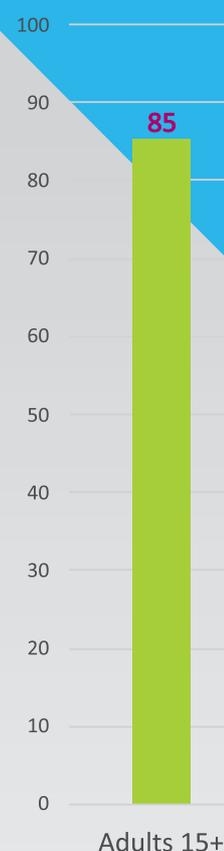


Source: TAM Ireland/Nielsen

## THE STATS: TV has high daily, weekly and monthly reach

TV is the most popular medium for all age groups. This immense popularity means that no other form of advertising can build scale as quickly and powerfully.

It is TV's unique ability to deliver huge audience figures in a short space of time that is part of the reason it is the most effective type of advertising around as it has been proven time and again that while it is good to have earned and owned media, for top-line growth brands must invest in paid-for, mass reach.



While the focus of TAM Ireland is to measure TV viewing, it is interesting to see how TV's reach compares with other media in Ireland. TGI looks at all media, and while it is a different research methodology, the weekly reach of TV compared to other media is detailed in the figures opposite.

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## Average Weekly Reach %



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

## Weekly Reach

Newspapers:	68.8%	Radio:	74.7%
Internet:	87.6%	Outdoor:	63%
Cinema (monthly reach):	18.5%	Television:	99.3%

Source: Kantar TGI ROI 2018

## TOP CATEGORIES & ADVERTISERS

A number of categories greatly increased their presence on TV in 2017. Below are the categories that have shown the most growth-these sectors (particularly mortgages and travel agents) giving a real reflection of what is going in in the wider economic environment.

### Top 10 Growth Categories 2017



TRAVEL AGENTS
MORTGAGES & RELATED PRODUCTS
MEDICATION
BUSINESS TELECOMS & ONLINE SERVICES
VEHICLES
ENTERTAINMENT & LEISURE
ALCOHOLIC DRINKS
ENTERTAINMENT - MUSEUM & ARTS
UTILITIES RESIDENTIAL
HOUSEHOLD TELECOM, TV & ONLINE SERVICES

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### Top 10 Advertisers Categories on TV in 2017

HOUSEHOLD TELECOM, TV & ONLINE SERV
HOUSEHOLD
VEHICLES
INSURANCE
RETAIL GENERAL
ENTERTAINMENT & LEISURE
ALCOHOLIC DRINKS
CONFECTIONERY & SNACKS
CLEANING, POLISHING & DYEING
MEDICATION

### Top 10 advertisers 2017

PROCTER & GAMBLE IRE
SKY
RECKITT BENCKISER
EIR
VODAFONE IRELAND
DIAGEO
VIRGIN MEDIA
LOREAL
UNILEVER
LIDL IRELAND GMBH

## TOP PROGRAMMES

The highest rating show of 2017 was The Late Late Toy Show and the 2nd highest was the All Ireland Football Final.

Interestingly the weather drove record daytime audiences as people tuned into the News to keep up with Storm Ophelia's path. As a result the One O'Clock RTE News came in at number 15.

Sport was another big winner this year accounting for 11 of the top 20 programmes of the year. Home produced programmes continued to dominate the top of the ratings chart across all channels..



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	Description	000's	Share %
1	The Late Late Toy Show	1,345.7	70.22
2	The Sunday Game Live (All-Ireland Senior Football Final) Dublin v Mayo	1,141.2	79.88
3	European Qualifiers: Play-Off for FIFA World Cup (second leg) - Republic of Ireland v Denmark	1,038.6	57.55
4	The Sunday Game Live (All-Ireland Senior Hurling Final) Galway v Waterford	916.5	72.85
5	World Cup Qualifier 2018 - Live - Wales v Republic of Ireland	866.1	49.05
6	RTE News: Nine O'clock	845.7	47.00
7	RBS 6 Nations - Live Play - Ireland v France	826.4	62.40
8	RBS 6 Nations - Live Play - Wales v Ireland	818.3	48.26
9	RBS 6 Nations - Live Play - Ireland v England	753.2	58.36
10	Mrs Brown's Boys CSI: Mammy	753.2	46.61
11	Mrs Brown's Boys: Mammy's Mummy	731.7	41.17
12	The Sunday Game Live (All-Ireland Senior Football Semi-Final) Kerry v Mayo	729.6	61.06
13	RTE News: Six One	717.4	45.60
14	Room To Improve	702.5	46.59
15	RTE News: One O'clock	698.0	59.72
16	The Late Late Show	690.4	50.31
17	Dancing With The Stars	663.9	43.35
18	The Sunday Game Live (All-Ireland Senior Football Semi-Final) Dublin v Tyrone	663.4	59.27
19	World Cup Qualifier 2018 - Live - Republic of Ireland v Serbia	661.8	41.78
20	RBS 6 Nations - Live Play - Scotland v Ireland	650.2	61.35

## We have more choice on our TV set than ever before

Alongside the increased choice is the fact that our viewing experience is better than ever before due to vastly increased screen sizes and HD reception.



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## 2017

2007

2012

2017



No. of TAM  
Ireland  
reported  
Channels

20

36

53



% of homes  
with TV  
Recorder  
/ PVR

5%

45%

60%



% of homes  
with  
access to  
broadband

49%

69%

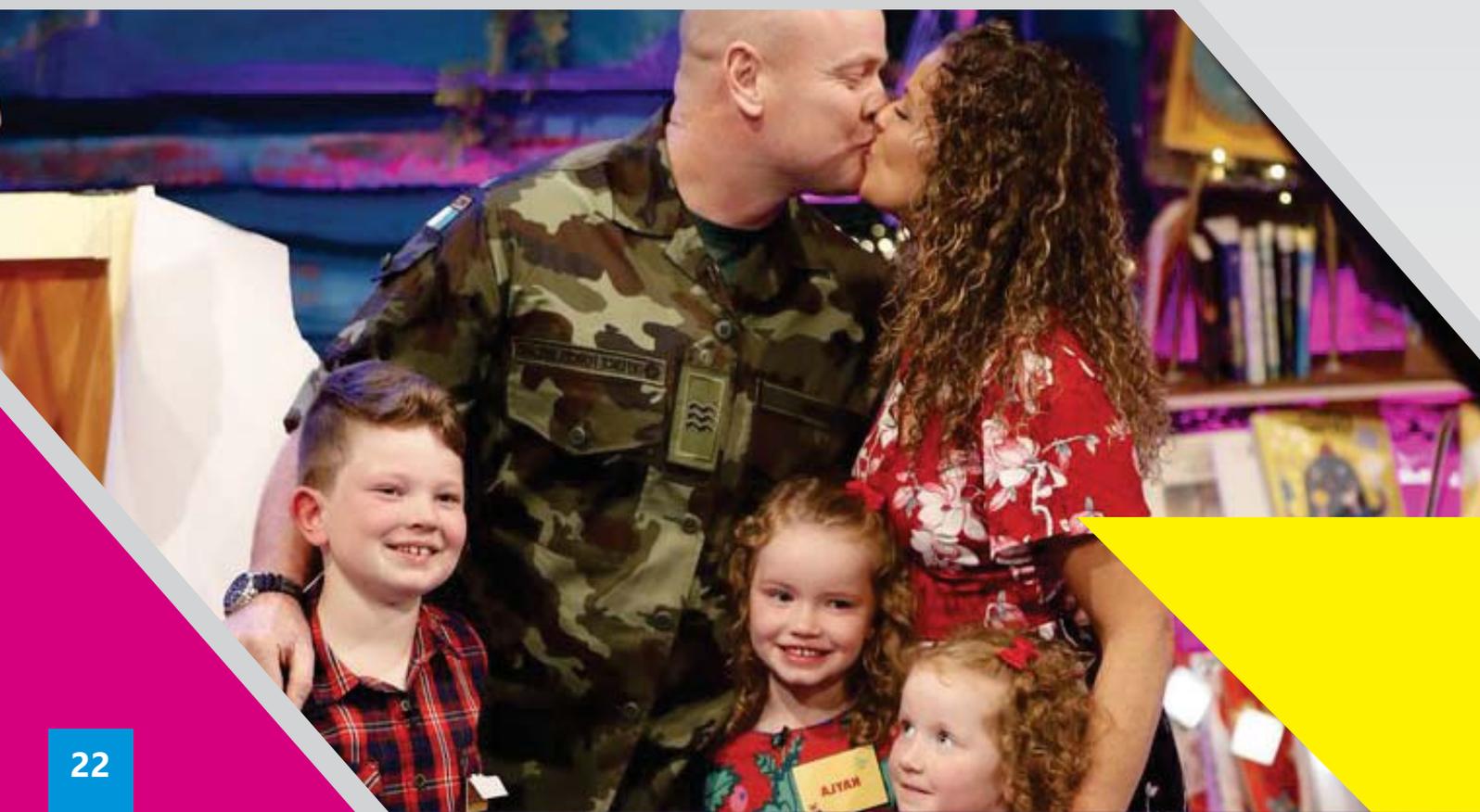
82%



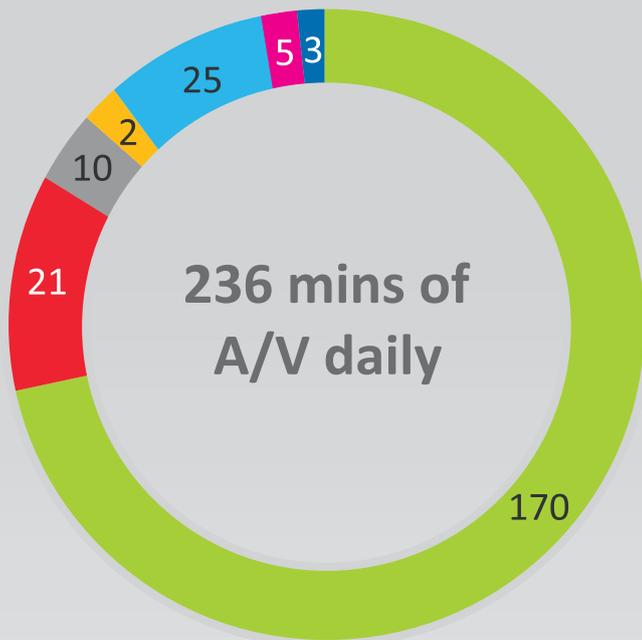
## TOTAL AV VIEWING

As the Irish public have embraced new ways to watch TV, their viewing has split across different times, places and devices however TV still dominates the new video world. Up to now industry standard measurement (viewing within 7 days of broadcast on a TV set) has not been able to keep pace with the changes in TV viewing.

However, the TAM AV Data Solution Tool launched this year gives us data on how much time we spend with different forms of video. It shows us that despite the proliferation of new video choices, live TV still accounts for 72% of the video day for an Adult aged 15+.



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- Live TV
- Recorded TV
- Broadcast Players
- Pay per view (Movies & Sports)
- Short Form Video
- Stand-alone online video service
- Other (includes DVD)

- 2017 – Format by minutes across all devices
- Adults 15+
- Base: All respondents 15+ (Time weighted)
- Fieldwork period: Jan/Feb 2017

Source: A/V Data Solution data – all adults, TV households, all day.

# VISTA



Video Integration Strategy for a Total Audience



# REVIEW

## 2017

### An Update

The TAM Future Group continues with their project to deliver cross platform measurement for the industry. In 2016 TAM Ireland launched their VISTA strategy (Video Integration Strategy for a Total Audience). A plan to measure all viewing to all formats across all devices. This is a long-term project that will take several years to develop. Launched in 2017, Phase 1 of VISTA (the A/V Data Solution) provides an interim solution to the TV advertising industry. This award winning planning aid gives users an understanding of the total A/V market and gives context and perspective to each element within it. This helps improve both media planning and campaign effectiveness for broadcasters, and advertising agencies and their clients.

With the VISTA strategy broadcasters, agencies and all TAM Ireland customers can be confident that TAM is building on the strength of the panel, while also embracing new A/V data sources. Being able to identify and measure an audiences' video media consumption, through cross media audience measurement is a significant breakthrough for the industry.



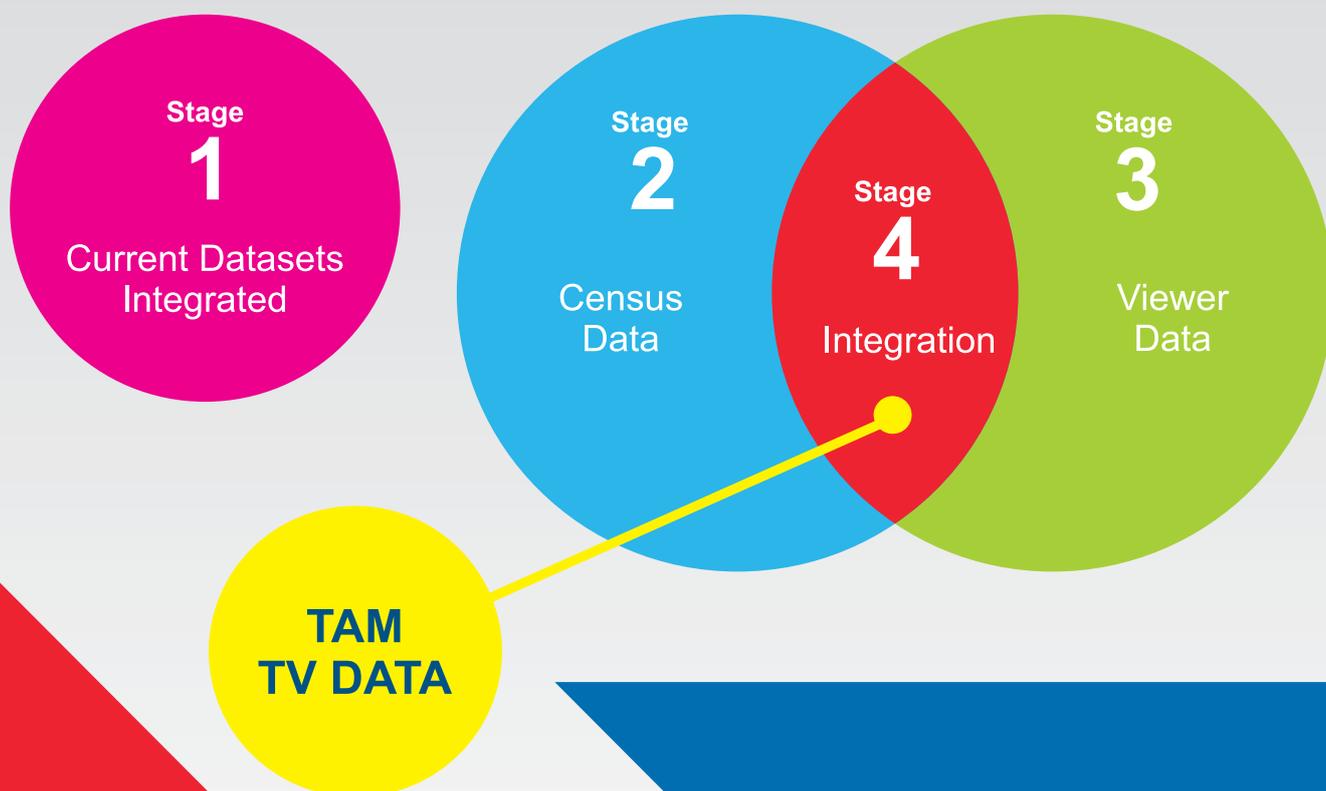
## The VISTA Project

# VISTA



Video Integration Strategy for a Total Audience

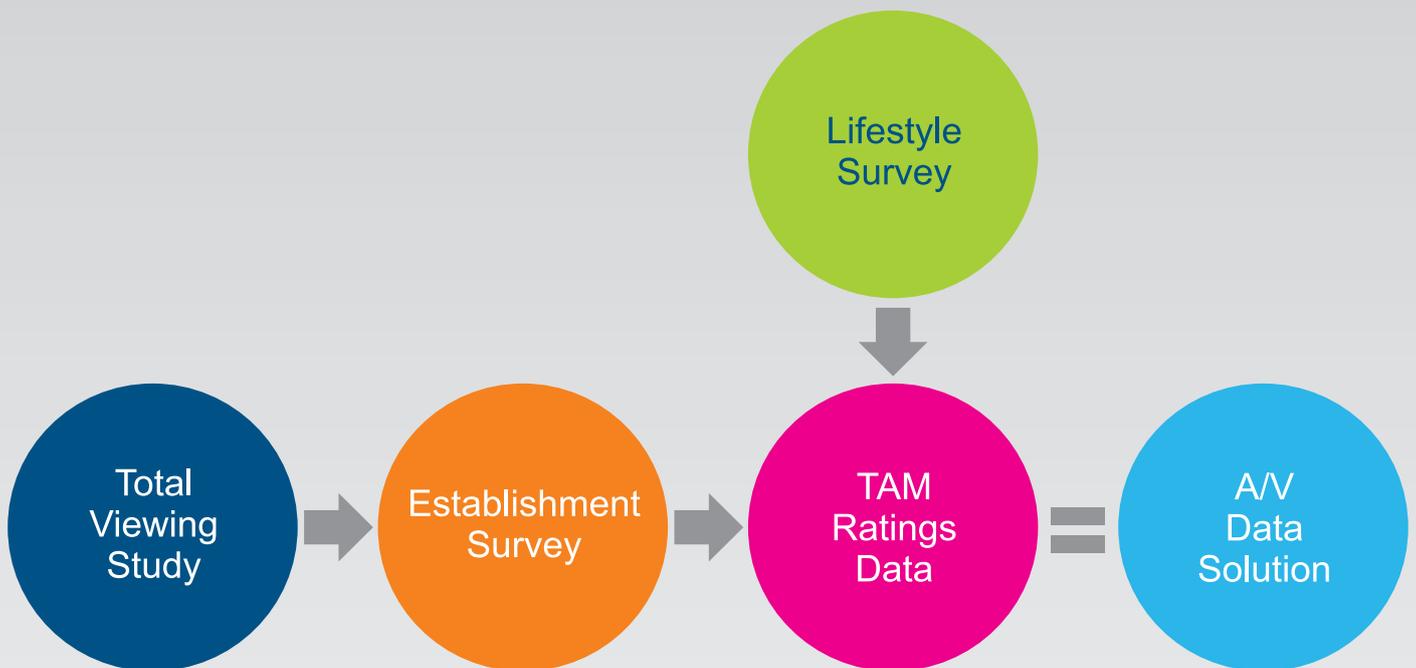
We launched our VISTA strategy (Video Integration Strategy for a Total Audience) towards the end of 2016. This is a 4 stage project which can be summarized as follows.



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Earlier this year we delivered on Stage 1 of the VISTA project which resulted in an Interim Planning Aid for the industry. This was a data fusion project undertaken by Nielsen's Data Science team and saw the fusion of TAM Data with the Establishment Survey and the Total Viewing study to deliver the TAM Ireland A/V Data Solution.



## Outcome & Learnings

The outcome of this project is a planning aid for the media agencies and broadcasters to provide a better understanding of the total A/V market and the relevance of each element within it.

The output is a pivot table and graphs detailing total viewing across all devices and formats

It includes the following:

- **Average daily minutes**
- **Daily, weekly & monthly net reach x format and device**
- **Daily, weekly & monthly Incremental reach x format and device**
- **In-home and out-of-home viewing**
- **All TV households and All households**
- **16 trading demographics**



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The data included in the final output is as follows:

<b>Total Broadcast Content</b>	
Live TV	As per Nielsen/TAM data
Recorded TV	As per Nielsen/TAM data
Broadcast Players (BVOD)	Catch up, on demand
Pay Per View	Movies and Sport
<b>Non Broadcaster Content</b>	
Short Form Video	YouTube, Facebook, Vimeo etc.
Stand Alone online video service (SVOD)	Netflix, Apple TV, Amazon Prime etc.
Other (incl DVD)	All other streaming, illegal down loads etc

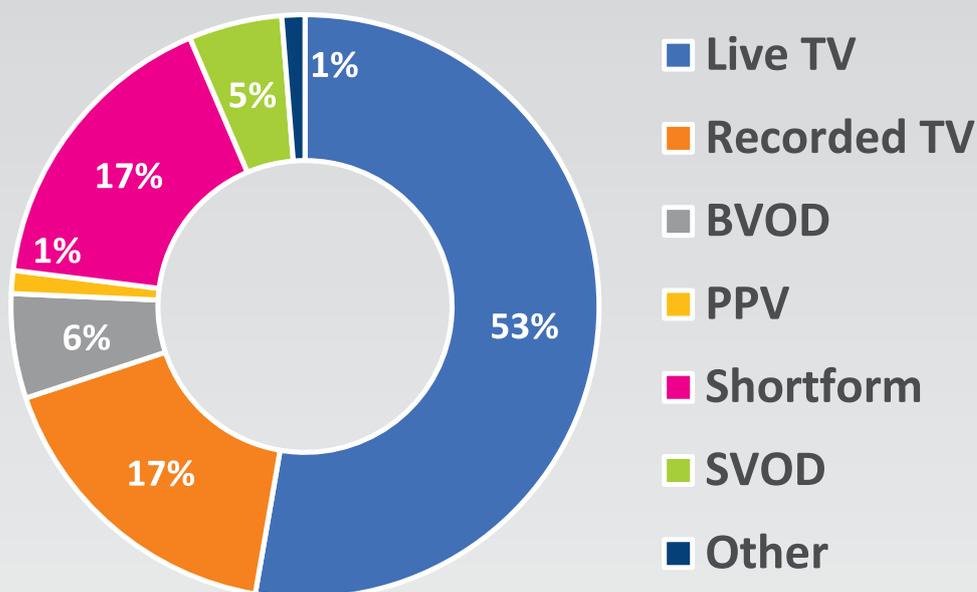


## 25-44 Years - All Households

Here is a sample of the type of findings available from the A/V Data Solution

### Share of minutes (daily)

77% of video viewing is to broadcaster content

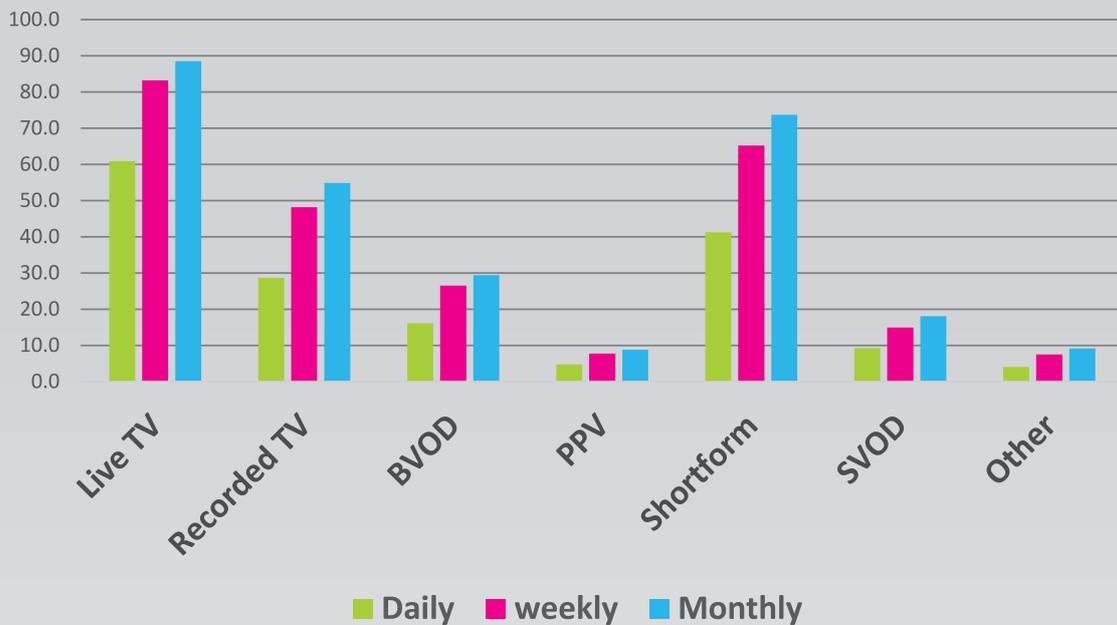


This chart shows the % of minutes in a day that are apportioned to that format for 25-44 year olds. % is used so that people can use it throughout the year – e.g. an estimate of Live TV on TV set mins for December using TAM data – use the % of mins in the tables to then calculate the minute data for all other formats/ devices during that period.

# REVIEW

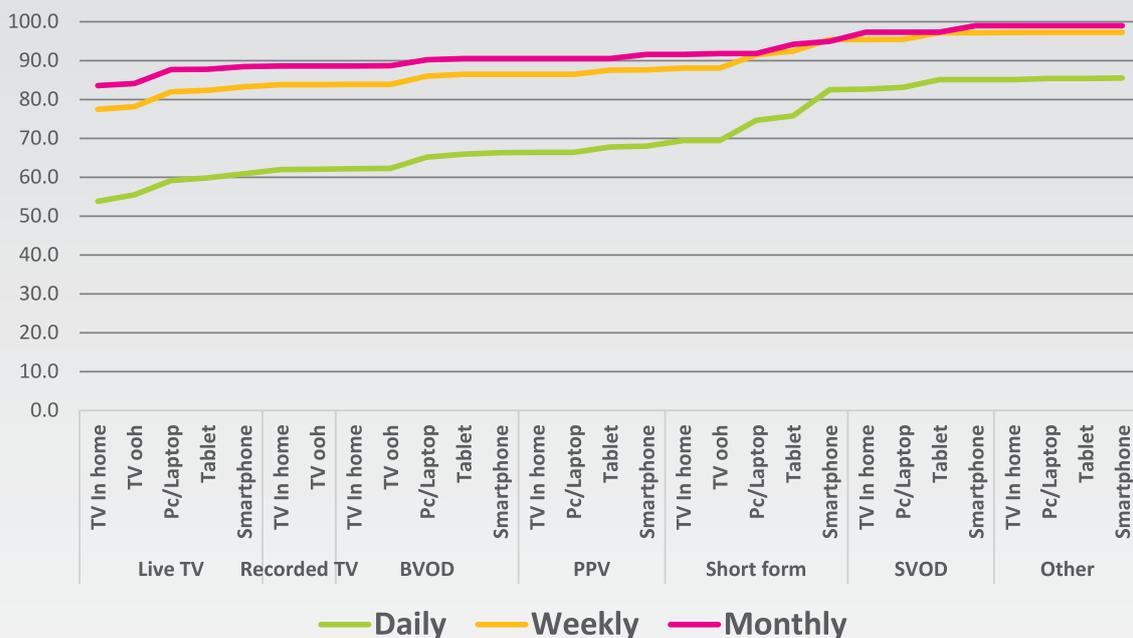
## 2017

### Net Reach



This chart shows the reach of each individual format for all 25-44 year olds in Ireland.

### Incremental Reach Build



The above chart shows the additional reach each format/device contributes to the total reach based on the order of the build.

## Key TV Moments

RTÉ ONE



A glittering array of stars strutted their stuff in the first season of Dancing with the Stars". Kerry footballer Aidan O'Mahony was crowned the winner. The Sunday night extravaganza drew an average weekly audience of 584,000.

# REVIEW

## 2017

RTÉ ONE



The Late Late Toy Show was watched by 1,607,900 people. It was the biggest TV programme of the year. This year's show was lauded on social media with "#LateLateToyShow trending number one worldwide on Twitter" on Friday night.

## Key TV Moments

RTÉ TWO



Dublin's nail-biting win over Mayo in the All Ireland Senior Football final drew an average audience of 1,137,500 to RTÉ2's live coverage of the game. 80.65% of all those watching TV at the time were tuned-in.

# REVIEW

## 2017

RTÉ TWO



Ireland's famous win in Cardiff in the FIFA World Cup Qualifier gave us hope of making it to the World Cup in Russia. 861,200 watched RTÉ2's live coverage of the game

## Key TV Moments

3



I'm a Celebrity had its best ever season launch on 19th November on TV3, delivering on average 546,000 viewers. Overall reach on the night was 930,000. This series delivered a very strong skewing 15-44 audience, with on average 53% of all Adults within this demo.

# REVIEW

## 2017

# 3



Gogglebox delivered its highest ever viewing performance on the 22nd November. The hugely talked about Season 3 finale with special guests Will Ferrell and Mark Wahlberg delivered on average 301,100 viewers. The episode was extremely popular with the elusive 15-24 cohort delivering on average 32% share.

## Key TV Moments

3



Storm Ophelia day on Monday 16th October was a record breaking day for News on TV3. Both the 12.30 and 5.30 pm News bulletins had their best ever performances, with the 5.30 delivering on average 354,000 viewers. On the day over 1.1 million viewers tuned in to News bulletins and our extended Storm coverage across TV3 & be3.

# REVIEW

## 2017



The fifteenth series of Geordie Shore began airing at the end of August and was the biggest show on MTV in 2017. The show has been renewed and filming is already underway for a sixteenth season.

## Key TV Moments

sky ATLANTIC



2017 has been a phenomenal year for showcasing world class television on Sky Atlantic. Brand new content such as Big Little Lies, Riviera & Tin Star enthralled viewers and were among the most talked about TV shows this year

# REVIEW

## 2017

sky ATLANTIC



The season finale of Game of Thrones delivered a consolidated audience of 130,000, twice the size of S6 finale and making it the biggest Game Of Thrones audience yet.

## Key TV Moments

sky SPORTS



Sky Sports continued its exclusive coverage of GAA Football and Hurling with 20 live GAA fixtures (including 14 exclusive) throughout the season. Down v Monaghan on July 26th delivered the largest GAA Football audience for Sky Sports since acquiring coverage rights back in 2014.

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## 2017



The Premier League returned on Sky Sports including exclusive 3pm Kick Off Premier League games . A Super Sunday of football on December 10th featured both the Liverpool & Manchester derbies. Over 280,000 viewers tuned in to the back to back coverage live on Sky Sports.

## Key TV Moments



Bake Off Launched on Channel 4 in August and was a huge hit with Irish Viewers, reaching over 900,000 of them across the series

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## 2017



Channel 4 had a dedicated week of Celebrity Specials supporting Stand Up To Cancer in the Autumn. Shows featured included favourites First Dates, Gogglebox, Crystal Maze & Celebrity Hunted

## Key TV Moments



## WOMEN'S RUGBY WORLD CUP 2017

IRELAND 2017



In 2017 eir Sport broadcast every single game of the Women's Rugby World Cup, including all the Ireland games, which demonstrated eir Sport's commitment to delivering excellent and broad ranging content.

# REVIEW

## 2017

TG4



TG4 set a record in 2017 with the highest-ever viewing figure for a Ladies' final on the station since it first started to broadcast the games back in 2001. An average of 303,800 people watched the live broadcast of the Senior GAA Football Final between Dublin and Mayo, The match reached 563,000 viewers in total and took a 40% share of viewing among Individuals.

