



Review 2019

WELCOME

What is TAM Ireland

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 in vision and adaptability.

The members of TAM Ireland are RTÉ, Virgin Media, TG4, Eir Sport, Sky Ireland, Channel 4, Viacom and the main Irish media buying agencies. We commission Nielsen to carry out the actual measurement service.

Our mission is:

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

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CONTENTS

1. Introduction
2. The Year in Numbers
3. Research
4. Must see charts
5. Cream of the Crop: 2019 TAMI Award Winners
6. Top TV Moments in 2019
7. Thoughts
 - TV Transformed
 - The Global Media Charter
 - Cotard Delusion: A live TV Health Check
8. How we can help?

SECTION 1: WELCOME

Welcome to the TAM Review of TV for 2019.

In 2019, quality TV content was enjoyed by hundreds of thousands of people in Ireland every day. It was powered by new technologies to make TV available anywhere, any time, on any screen to the Irish viewing public. Our Annual Review aims to help you understand how TV evolved over the last year. We have plenty of data here to share with you-all the TV facts and figures that you need to know.

If you want some clever opinions alongside your cold hard facts and stats, we have some great insight pieces from Fiona McCann and Jenny Legge along with the World Federation of Advertisers charter.

In 2019 TAM Ireland continued to work with Nielsen to provide TV viewership data and to support the TV advertising industry



Industry Development:

Our Industry committees worked hard this year. The Panel Operations Group oversee the trading currency and ensure the Gold Standard measurement is maintained and continues to be reliable and transparent. The BVOD committee put in a lot of work, the fruits of which we hope to provide the industry with later this year

Activities:

2019 was a very busy year for us with Industry events - from running our TAM TV Training, to hosting Ireland's first TV Planning Awards, having a long lunch with Rory Sutherland and the very successful Plannervision which is on again this January.



In November 2019 we launched TAM Ireland's first ever TV advertising campaign which was designed to remind advertisers of the continuing power and effectiveness of TV by focusing on television's ability to create long-term memories. The ad paid affectionate tribute to some of the greatest and most effective Irish and international TV commercials.

2020 will see just as much if not more activity. Kicking off with Plannervision on January 28th, followed by The TAMIs Planning Awards in March. Our hugely popular TV Training (in association with IAPI), will run throughout the year with 4 sessions planned, the first of which takes place in February. There will also be a Showcase event of our TAMI Award winners in September and the TAM Long Lunch will be back again in October!

Research:

In 2019 TAM joined forces with Thinkbox and B&A to bring you our fascinating study: Our Video World: The Needs That Drive Us. Details of which can be found later in this document and online

Before I finish I'd like to thank the Broadcasters who kept TV in Ireland at the top of its game in 2019 with amazing content and also to all the advertisers who invested in TV during the year. There is no doubt that TV in Ireland has a powerful story to tell and TAM Ireland is proud to be able to tell it. We look forward to another exciting year in 2020.

Jill McGrath



SECTION 2: THE YEAR IN NUMBERS

We all know that the way in which we watch TV continued to change in 2019. With the emergence of on-demand services, from broadcaster apps to the variety of subscription VOD services in the market, consumers have access to high-quality content wherever and whenever. TV is now everywhere.

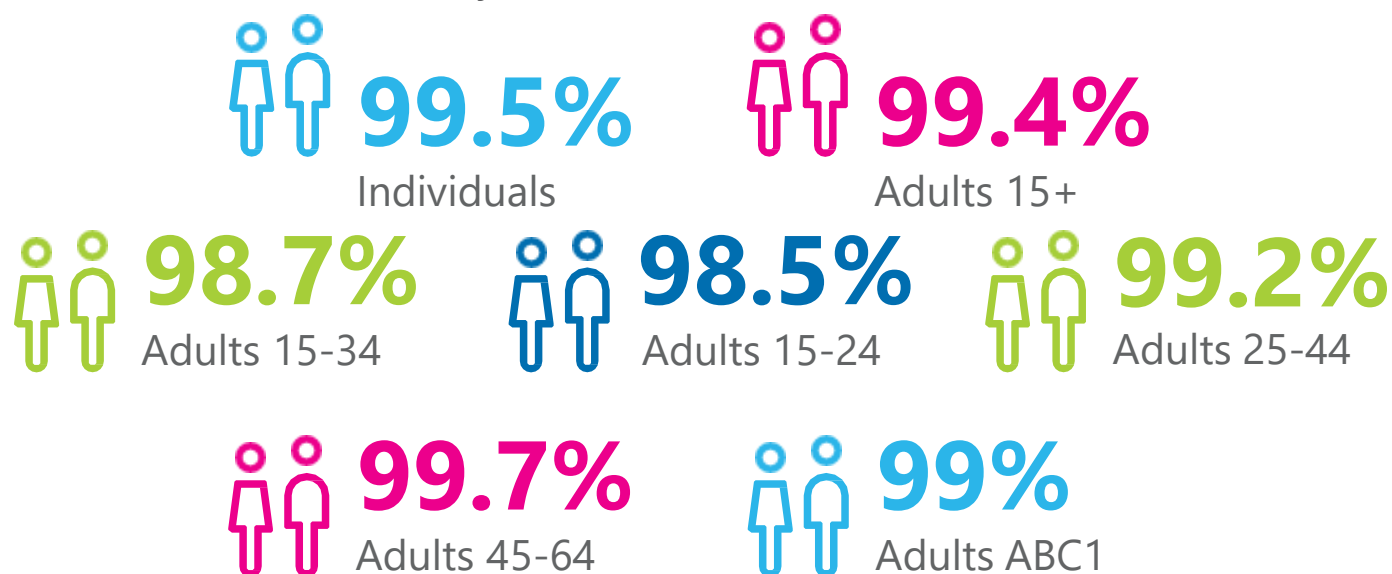
The shape of our TV viewing has changed with a redistribution of viewing from 100% linear to a blend of linear and on demand. At TAM Ireland, we are working towards delivering consistent comparable data across all devices and formats.





1) TV Continued to Offer Unbeatable Scale and Reach in 2019

TV continued to reach large numbers of all key audiences: Across the year TV reached.



TAM Ireland/Nielsen TAM, Consolidated, 1st January - 31st December 2019, National, Individuals 4+, All Day, Total TV, Reach 1+ Consecutive

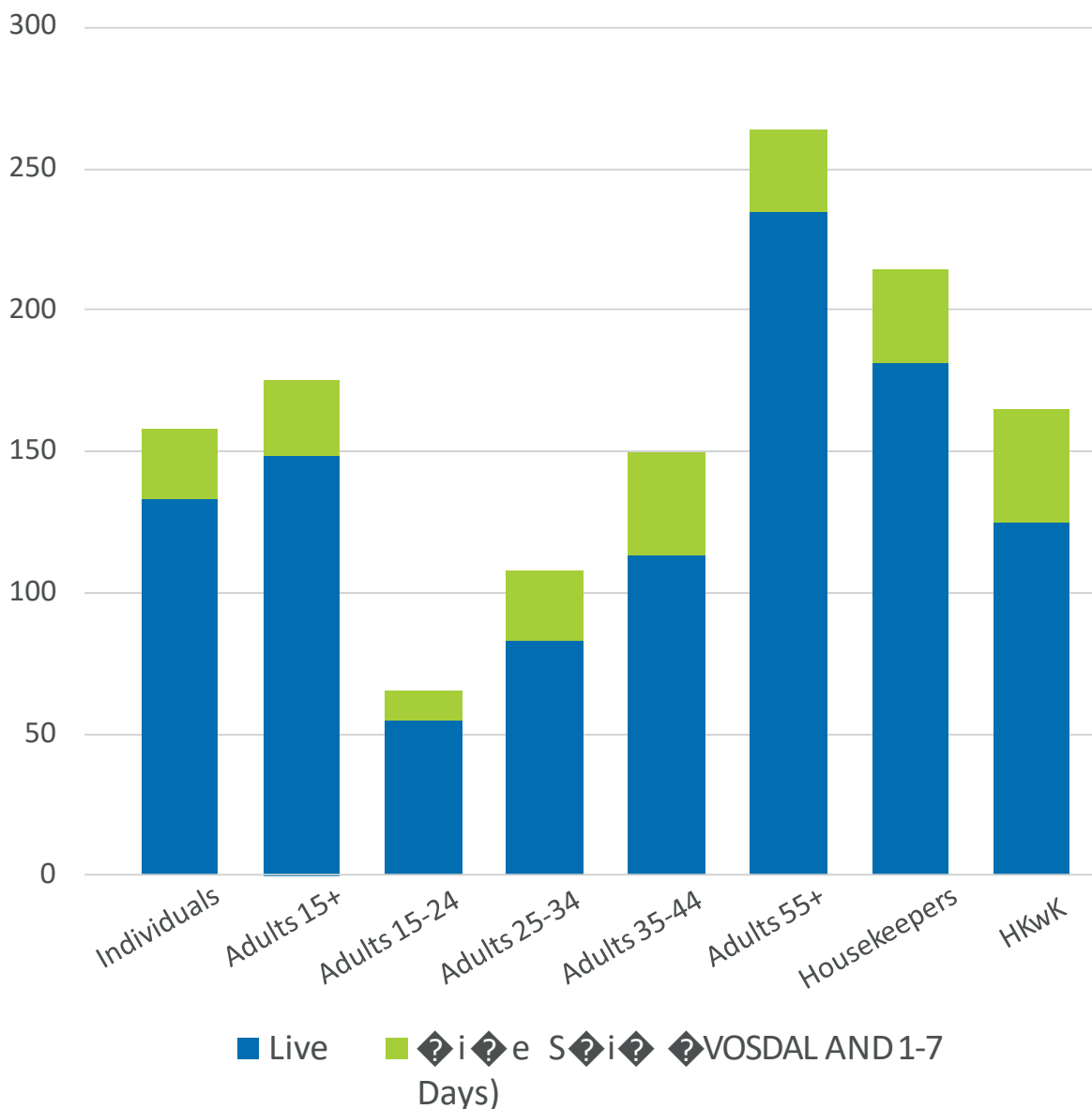


TAM Ireland/Nielsen TAM, Consolidated, 1st January - 31st December 2019, National, Individuals 4+, All Day, All ROI Commercial Channels, Reach 1+ Consecutive

2) In 2019 Live TV remained fundamental to people's viewing experience

Live TV continued to excel at delivering a shared experience and allowing us to stay in touch with the wider world.

Live Viewing vs. Delayed Viewing 2019



Source:
TAM Ireland/Nielsen TAM, National, All Day, Consolidated, Average Minutes per person

3) In 2019, the average person watched 80 hours of linear TV each month

This is the equivalent of watching the whole of Season 3 of The Crown on Netflix 8 times.

TAM Ireland/Nielsen TAM, Consolidated, 1st January - 31st December 2019, National, Individuals 4+, All Day, Total TV, Average Minutes per person

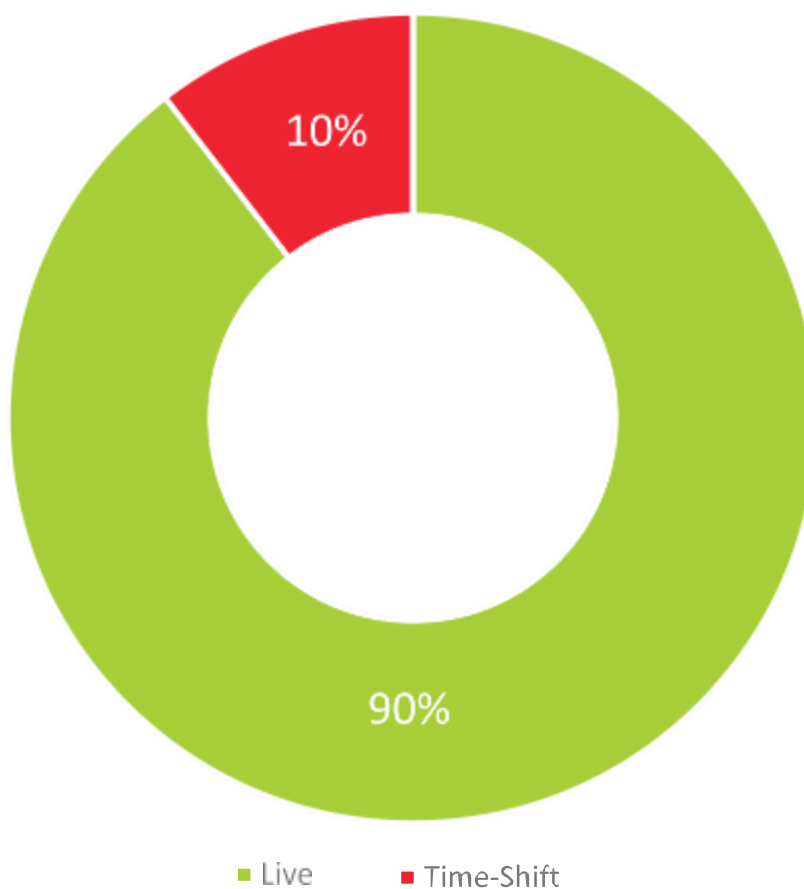


4) As in other years, viewing in 2019 changed by genre

Sport is time-sensitive and has high levels of live viewing. Here we see that live TV is imperative. Miss the match and you miss out – and you'll discover the score anyway unless you lock yourself away and shut down the internet. Sport is amongst the most time-sensitive TV.

Example: Six Nations 2019-Ireland Live Games Virgin Media One

Live 6 Nations 2019
% TVRs Viewed Live V Time-Shifted



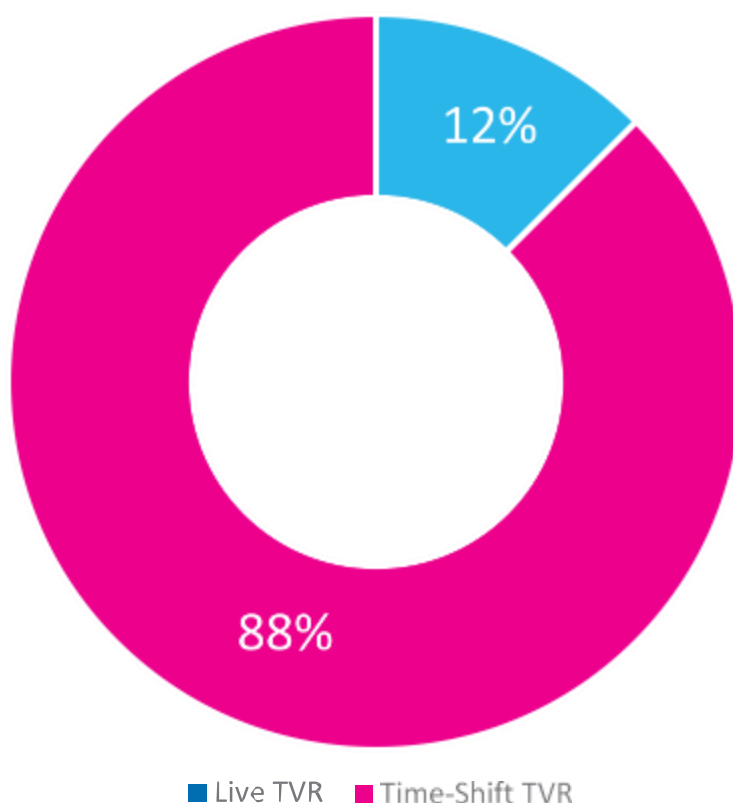
Source: TAM Ireland/Nielsen TAM, National, Individuals 4+, February/March 2019, Virgin Media One

Prime time drama was more likely to be time shifted. We want to dive into our drama. We want to be in control and ideally not be disturbed when we watch it. It demands our full attention, so it is hardly surprising that, now we have more control than ever over how we watch, drama is perfect for time-shifted viewing.

Chernobyl-the huge hit for Sky Atlantic was a massive time-shifted hit-87.5% was watched after initial transmission. Interestingly though, as word of mouth on the show spread and the ratings grew, episode on episode the % of people watching live increased.

Example:

Chernobyl Sky Atlantic
% TVRS Live V Timeshifted



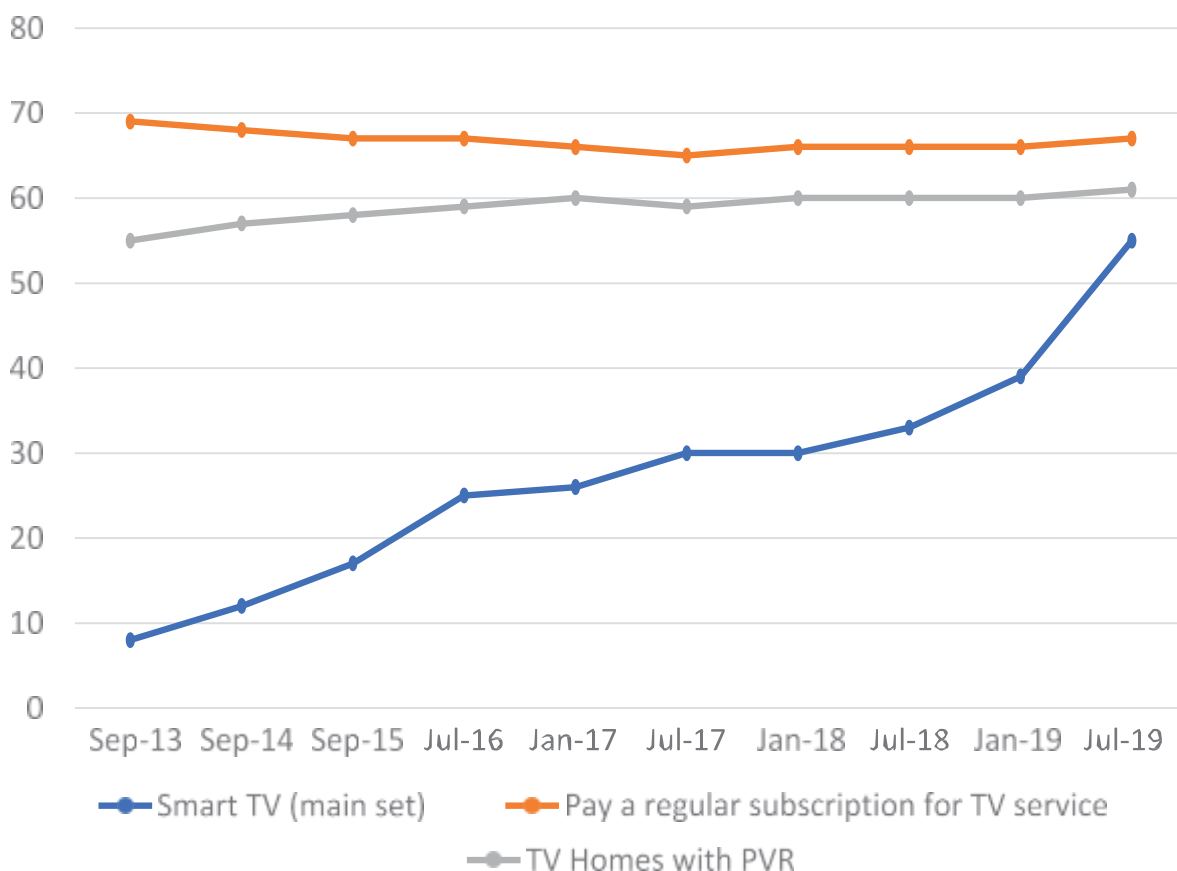
Source: TAM Ireland/Nielsen TAM, National Individuals 4+, Sky Atlantic

5) People continued to invest in 'quality' TV set viewing in the home

Despite the proliferation of devices and the myriad of ways we can now watch video content, Irish people continue to invest in TV subscriptions with suppliers such as Sky and Virgin.

Smart TV sets also started to become more mainstream in 2019.

Paying for Quality TV Viewing in the Home



Smart TV figures from Sept 13- Sept-15 the question was based on Main Set.

From July 2016 the question changed to 'Are any of your sets a Smart TV?'

Source: TAM Ireland Establishment Survey

6) Online conversations still driven by TV

Television shows, TV personalities and live sport featured prominently in Google's most searched terms in Ireland for 2019. This data confirms what we have always known-that TV is a high engagement medium. The data enables us to fully understand the powerful connection between audiences and TV programmes.

- 1. Overall Searches**
- 2. Rugby World Cup**
- 3. Gay Byrne**
- 4. Storm Lorenzo**
- 5. Game of Thrones**
- 6. Brendan Grace**
- 7. Cameron Boyce**
- 8. EU Election Results**
- 9. Shane Lowry**
- 10. Joker**
- 11. Luke Perry**

Source: Google Trends-Overall Searches Ireland
2019

7) The top 50 Programmes on Television in Ireland 2019 reflected the unique strength of TV broadcasters in producing live “event” content at scale to mass audiences

Rank	Programme	Channel	Date	000s
1	Late Late Toy Show, The	RTÉ One	29-11-2019	1540.7
2	All Ireland Football Final (replay) Dublin v Kerry	RTÉ2	14-09-2019	991.3
3	All Ireland Football Final Dublin v Kerry	RTÉ2	01-09-2019	988.6
4	6 Nations Live Ireland V England	Virgin Media One	02-02-2019	980.2
5	All Ireland Hurling Final - Kilkenny v Tipperary	RTÉ2	18-08-2019	829.5
6	6 Nations Live Ireland v France	Virgin Media One	10-03-2019	772.4
7	Rugby World Cup 2019 Live - New Zealand v Ireland	RTÉ2	19-10-2019	766.3
8	I'm a Celebrity Get Me Out of Here	Virgin Media One	17-11-2019	724.1
9	All Ireland Football Semi Final - Dublin V Mayo	RTÉ2	10-08-2019	696.5
10	Room To Improve	RTÉ One	06-10-2019	687.7
11	Gay Byrne Tribute - The Late Late Show	RTÉ One	05-11-2019	665.8
12	Euro 2020 Qualifiers - Republic of Ireland V Denmark	RTÉ2	18-11-2019	649.4
13	Rugby World Cup 2019 Live - Ireland V Scotland	RTÉ2	22-09-2019	643.7
14	Mrs Brown's Boys - A Wonderful Mammy	RTÉ One	25-12-2019	633.4
15	LIVE: Tott V Liverpool	Virgin Media One	01-06-2019	633.1
16	Rugby World Cup 2019 Live - Japan V Ireland	RTÉ2	28-09-2019	622.6
17	6 Nations Live Wales v Ireland	Virgin Media One	16-03-2019	613
18	Late Late Show, The	RTÉ One	13-12-2019	611.7
19	6 Nations Live Scotland v Ireland	Virgin Media One	09-02-2019	599.4
20	Dancing With The Stars	RTÉ One	27-01-2019	594.2
21	RTE News: Nine O'Clock	RTÉ One	27-01-2019	571.5
22	6 Nations Live Italy v Ireland	Virgin Media One	24-02-2019	559.5
23	Dermot Bannon's Incredible Homes	RTÉ One	10-02-2019	555.1
24	Rose Of Tralee International Festival 2019	RTÉ One	27-08-2019	553.9

25	All Ireland Hurling Semi Final - Wexford v Tipperary	RTÉ2	28-07-2019	551.2
26	All Ireland Football Semi Final - Kerry v Tyrone	RTÉ2	11-08-2019	545.6
27	RTE News: Six One	RTÉ One	04-11-2019	530.3
28	Euro 2020 Qualifiers - Switzerland v Republic of Ireland	RTÉ2	15-10-2019	524.4
29	New Year's Eve Countdown Concert	RTÉ One	31-12-2019	514
30	Prime Time	RTÉ One	02-05-2019	510.7
31	Operation Transformation	RTÉ One	23-01-2019	508.5
32	Champions League Live - Liverpool v Barcelona	RTÉ2	07-05-2019	497.3
33	Young Offenders, The	RTÉ2	11-11-2019	487.4
34	RTE Investigates - Creches, Behind Closed Doors	RTÉ One	24-07-2019	483.8
35	Leinster Senior Hurling Championship Kilkenny V Wexford	RTÉ2	30-06-2019	475
36	Daniel And Majella's USA Road Trip	RTÉ One	17-03-2019	462.3
37	Euro 2020 Qualifiers - Republic Of Ireland v Switzerland	RTÉ2	05-09-2019	461.5
38	Brendan Grace Thanks For The Memories	RTÉ One	14-10-2019	459.4
39	All Ireland Senior Hurling Championship Semi Final Limerick V	RTÉ2	27-07-2019	459.2
40	Coronation Street	Virgin Media One	21-01-2019	459
41	Fair City	RTÉ One	20-01-2019	453.4
42	Euro 2020 Qualifiers - Denmark v Republic of Ireland	RTÉ2	07-06-2019	450.4
43	Leinster Senior Football Championship Dublin V Meath	RTÉ2	23-06-2019	449.7
44	Rugby World Cup 2019 Live - England v South Africa	RTÉ2	02-11-2019	440.5
45	One Day: How Ireland Cleans Up	RTÉ One	14-01-2019	440.3
46	Munster Senior Hurling Championship - Limerick V Tipperary	RTÉ2	30-06-2019	439.3
47	All Ireland Senior Football Cham. Qtr. Final Kerry v Donegal	RTÉ2	21-07-2019	437.5
48	Ireland's Fittest Family	RTÉ One	01-12-2019	426.1
49	Raised By The Village	RTÉ One	13-10-2019	424.1
50	One Day: Showing Ireland Off	RTÉ One	21-01-2019	423.9

Source: TAM Ireland Ltd / Nielsen TAM

1 Top Programmes based on Individuals 4+, All Subscribing Channels, Averaging Option: Any Day, Any Time, Best Episode, Minimum Duration 10 Minutes.

Please note: This list uses best episode of a series

In 2019, the advertising dominance of the home media/ telecoms providers and retailers continued

Top 20 Products on Television in Ireland 2019

1. SKY BRAND
2. ALDI PRODUCT RANGE
3. TESCO PRICE & ITEM
4. EIR BROADBAND
5. LIDL PRODUCT RANGE
6. THREE MOBILE PHONE NETWORK
7. VODAFONE BROADBAND
8. SUPERVALU PRICE & ITEM
9. EIR POST PAY
10. HARVEY NORMAN STORE
11. ULSTER BANK MORTGAGES
12. PERMANENT TSB MORTGAGES
13. ENERGIA ENERGY SUPPLY
14. GUINNESS DRAUGHT
15. BANK OF IRELAND MORTGAGES
16. AIB MORTGAGES
17. VHI HEALTHCARE
18. HEINEKEN LAGER
19. DFS FURNITURE
20. NOW TV

Source: TAM Ireland/Nielsen TAM, National, Consolidated, Individuals 4+, 30"
TVRs All Commercial Channels

Top 20 Advertisers on Television in Ireland 2019

1. PROCTER & GAMBLE IRE
2. SKY
3. DIAGEO
4. EIR
5. VODAFONE IRELAND
6. THREE
7. RECKITT BENCKISER
8. MCDONALDS
9. ALDI STORES LTD
10. TESCO IRELAND
11. VIRGIN MEDIA
12. LIDL IRELAND GMBH
13. LOREAL
14. BANK OF IRELAND
15. HEINEKEN IRELAND
16. ALLIED IRISH BANKS
17. SUPERVALU
18. AN POST
19. NATIONAL LOTTERY
20. NESTLE

Source: TAM Ireland/Nielsen TAM, National, Consolidated, Individuals 4+, 30"
TVRs All Commercial Channels

Top 20 Categories on Television in Ireland 2019

1. HOUSEHOLD TELECOM, TV & ONLINE SERV
2. HOUSEHOLD
3. VEHICLES
4. INSURANCE - OTHER
5. ALCOHOLIC DRINKS
6. ENTERTAINMENT & LEISURE
7. MORTGAGES & RELATED PRODUCTS
8. UTILITIES RESIDENTIAL
9. ETAIL GENERAL
10. CONFECTIONERY & SNACKS
11. MEDICATION
12. PERSONAL HYGIENE & HEALTH
13. GOVERNMENT DEPARTMENTS/MINISTRIES
14. LEISURE EQUIP GAMES-RECREATION
15. CLEANING, POLISHING & DYEING
16. ENTERTAINMENT - FILM RELEASES
17. SOFT DRINKS
18. PREPARED & CONVENIENCE FOODS
19. HAIR PRODUCTS
20. DAIRY PRODUCTS & SUBSTITUTES

Source: TAM Ireland/Nielsen TAM, National, Consolidated, Individuals 4+, 30"
TVRs, All Commercial Channels

9) Online Businesses invested heavily on TV in 2019

Some of the world's largest online companies invested in building their image, reputation and sales through the reach and influence of TV during 2019. Of the increased investment by online businesses in 2019, the fact that Amazon tripled the number of ratings it purchased in the Irish market was notable.

It is a testament to TV's continuing power to deliver that a company like Amazon, which understands its customers so well, is using TV to power its success.

Other online brands investing in TV in 2019 included:

- 1. Trivago**
- 2. Snapfish**
- 3. Amazon**
- 4. Prettylittlething**
- 5. 123.ie**
- 6. Attraction Tickets Direct**
- 7. Chill Insurance**
- 8. Littlewoods Ireland**

Source: TAM Ireland/Nielsen TAM, National, Consolidated, Individuals 4+, 30" TVRs, All Commercial Channels

SECTION 3: RESEARCH THE AGE OF TELEVISION-THE NEEDS THAT DRIVE US

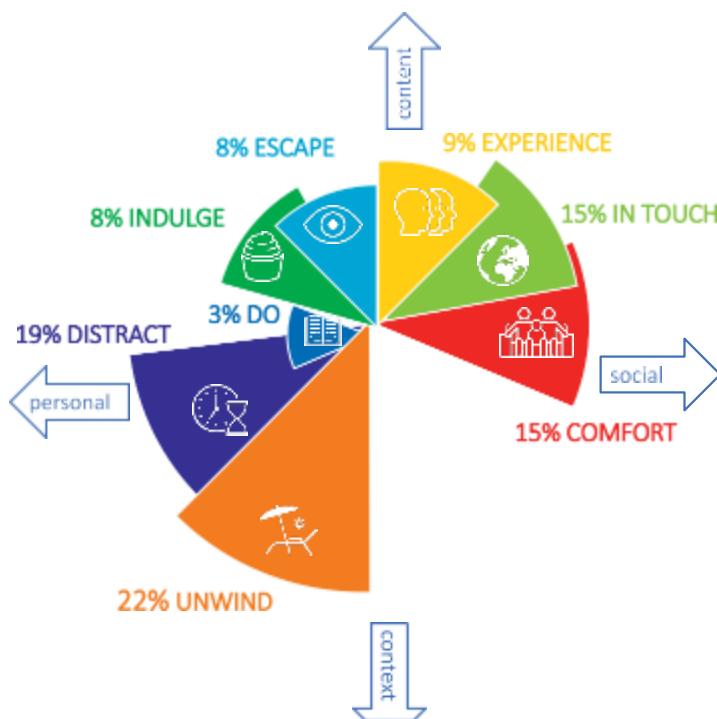
Video is firmly entrenched in our lives. Whether we're snuggling on the sofa for an evening of telly or killing time on our mobiles before the bus arrives, the opportunities to watch have never been greater.

In 2019, partnering with Thinkbox UK and with the Irish research carried out by Behaviour & Attitudes, we detangled the role that video plays in our lives to

determine how the different video formats coexist and why viewers choose to invest their time in a range of video platforms.

We found that whatever we watch, we are doing so to satisfy one or more of the eight different 'need states': unwind, distract, comfort, in touch, experience, indulge, escape and do. The study found that Live TV delivers across the widest range of need states and it also helped explain why different forms of TV and video happily co-exist in our lives.

Share of Viewing in Ireland



- There are eight primary needstates, the size of which is dictated by the time audiences spend meeting each one with video content. A significant proportion of time spent watching video content is to fulfil the need to Unwind, and for Distraction.
- A great amount of time is also spent consuming video to meet the need for Comfort, and to remain In Touch with what is happening in the world.
- The role of content and context varies across each needstate with, for example, content particularly important for Escape and Experience, and context (e.g. the need to de-stress without having to concentrate too much) a key motivator for the Unwind needstate.

Different video for different needs

The proliferation of content and ease of availability across platforms means that all forms of video coexist in harmony but each has now been liberated to do what it does best.

For Live TV, it's about the high quality, immersive and trusted environment that the broadcasters offer, especially the more social or communal reasons we watch TV. BVOD is about platforms that help the viewer relax and our desire to lose ourselves in other worlds via TV.

SVOD has developed to provide a valued means of binge-watching and YouTube fills gaps in the day with short bites of video and is a go-to destination for practical help.

Most Needs are universal but the ways we fulfil those Needs differ with age

The impact of life-stage is generally secondary to overall human needs – most are universal but the ways we fulfil those needs differ with age.

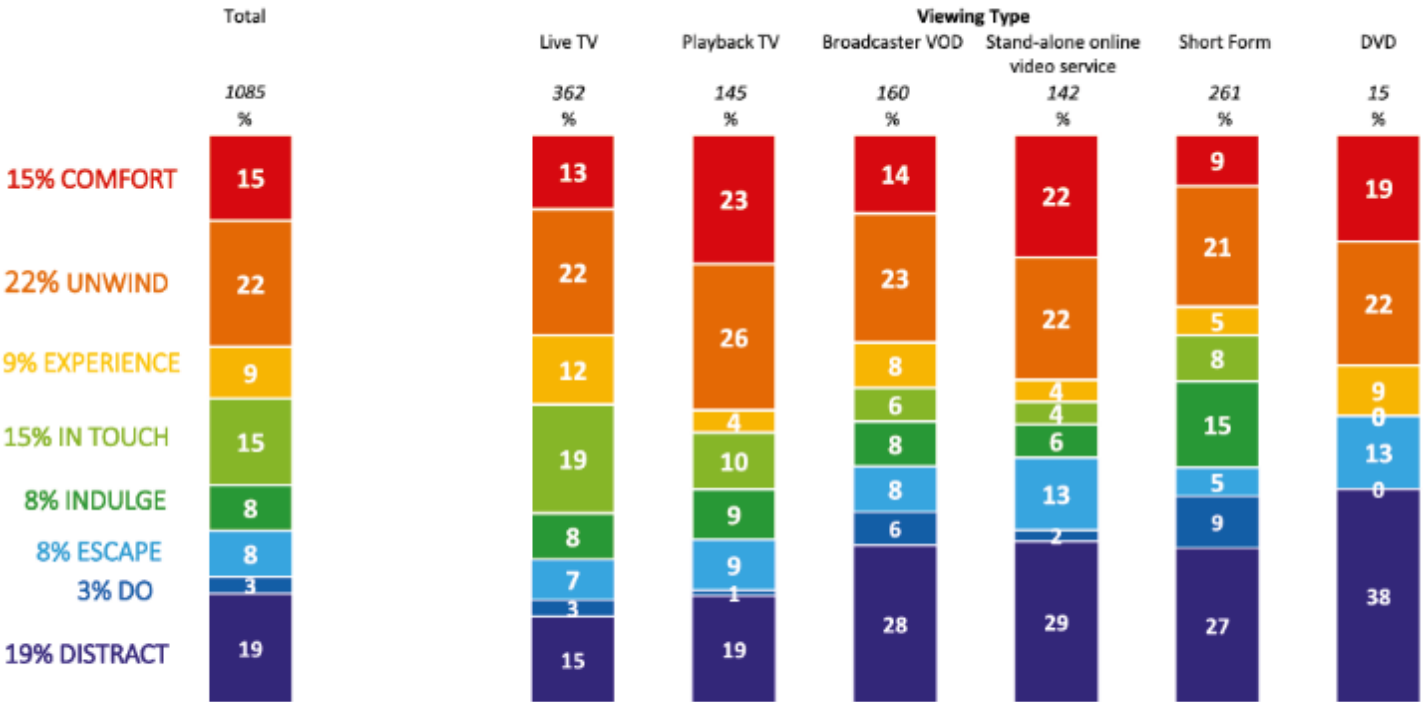
The research highlighted some key differences. Whilst many needs are consistent across life stage, the need for distraction which is heavily served by online video, declines with age.

In contrast the need to stay 'In touch' through news and current affairs, which is served by online video for younger audiences and TV for older audiences, increases.



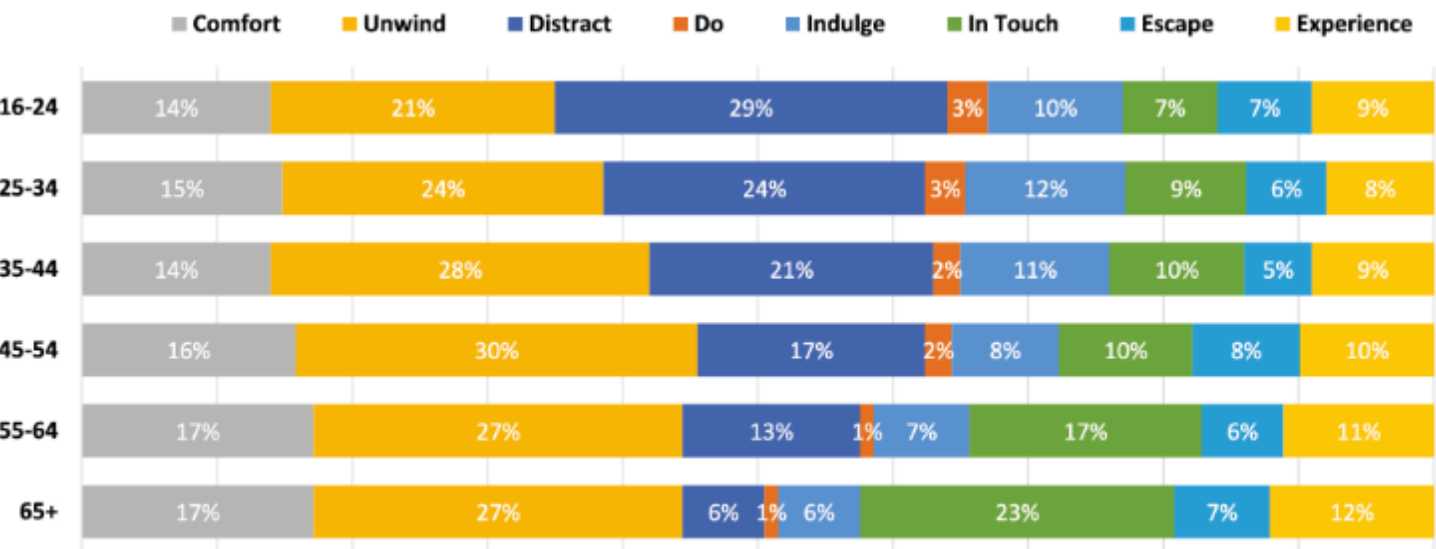
Need State x Viewing Type

Base: All participants any viewing



Source: Our Video World, 2018, B&A/TAM Ireland/Thinkbox

Almost a third of 16-24's viewing is in the 'distract' need state





SECTION 4: CHARTS EVERY ADVERTISER SHOULD

More than perhaps at any other time, the last 12 months have seen effectiveness move to the centre of the advertising industry – the place it should always have been. So, we have put together the key charts in one place about the facts of what works.

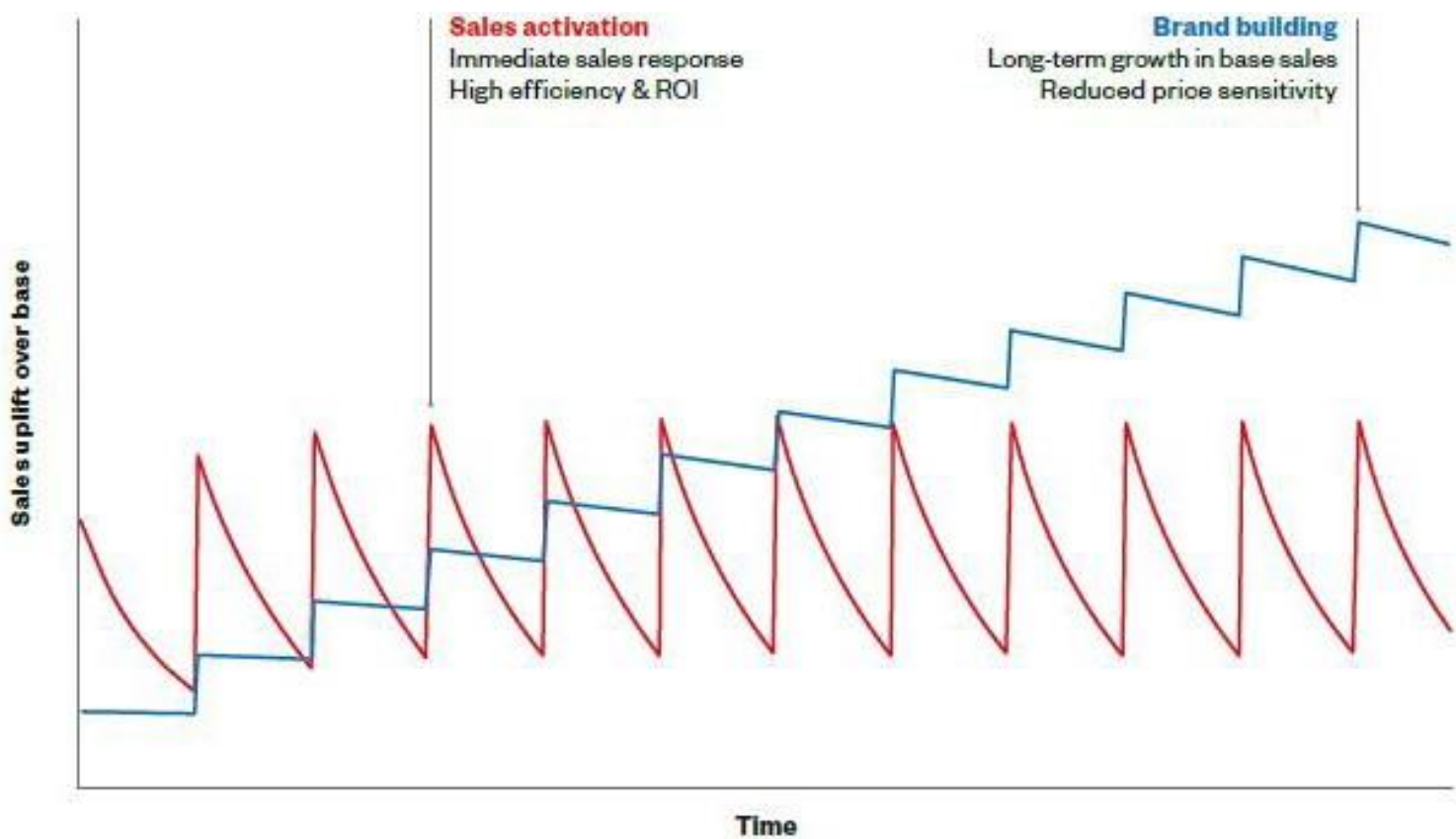


CHART 1:

Marketing works in two ways, Sales Activation & Brand Building

Many marketers assume that, if you look after the short term, the long term will look after itself. This chart explains why this is dangerously wrong. The key is to understand that marketing works in two very different ways. Binet & Field research tells us that sales activation aims to get an immediate behavioural response.

Activation is good for short-term selling, and ROIs can be high. But the effects don't last long, and do little to foster long-term growth.

Brand activity creates long-term memories, associations and habits which influence consumers for years to come.

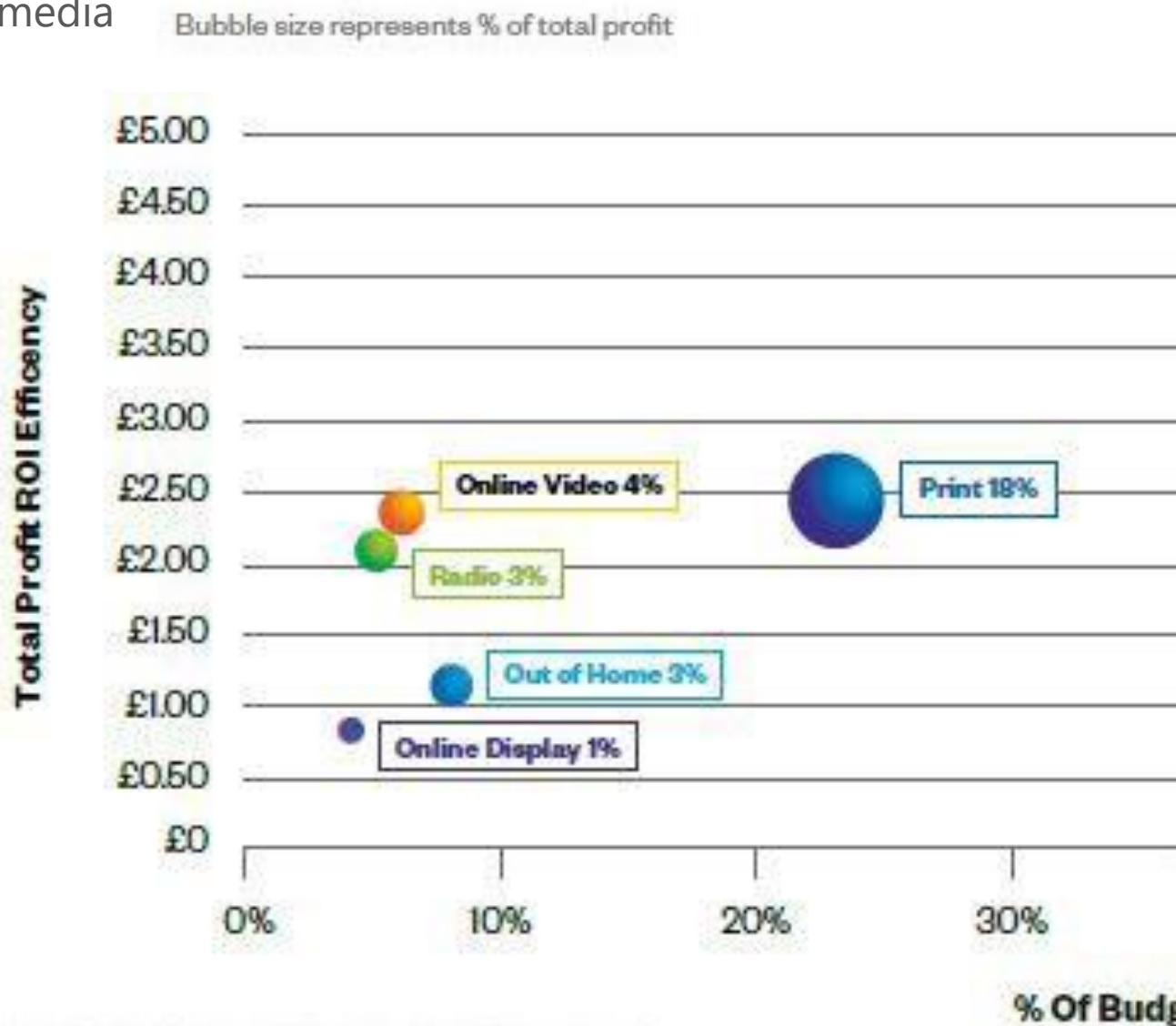
This is a harder job, requiring repeated exposure, but the effects last longer and accumulate over time to drive growth and long-term profit.

Businesses need both. They need brand activity to create demand, and they need activation to convert demand

CHART 2:

TV delivers 71% of total profit generated by advertising

This chart shows that for the mid and large B2C advertisers covered by Ebiquity and Gain Theory's client-funded econometric studies, TV generates the highest average three-year return and online display the lowest. These are average figures and the results will vary greatly between different brands and campaigns because of variations in the context, the objectives, and the quality of creative strategy and execution. There may also be synergies between media



Sources: 'Profit Ability: the business case for advertising', Nov 2017 Ebiquity
ROI campaign database (Feb'14-May'17) & Gain Theory. Campaign obs: 1,954

But, overall, because of TV's high average three- year return, it still captures over 50% of these brands' media budgets. It's that combination of high profitability and high investment that explains its remarkable 71% share of the total profit contribution in the chart and what most companies want when allocating resources to advertising is to maximise its contribution to the long- term value of the business.

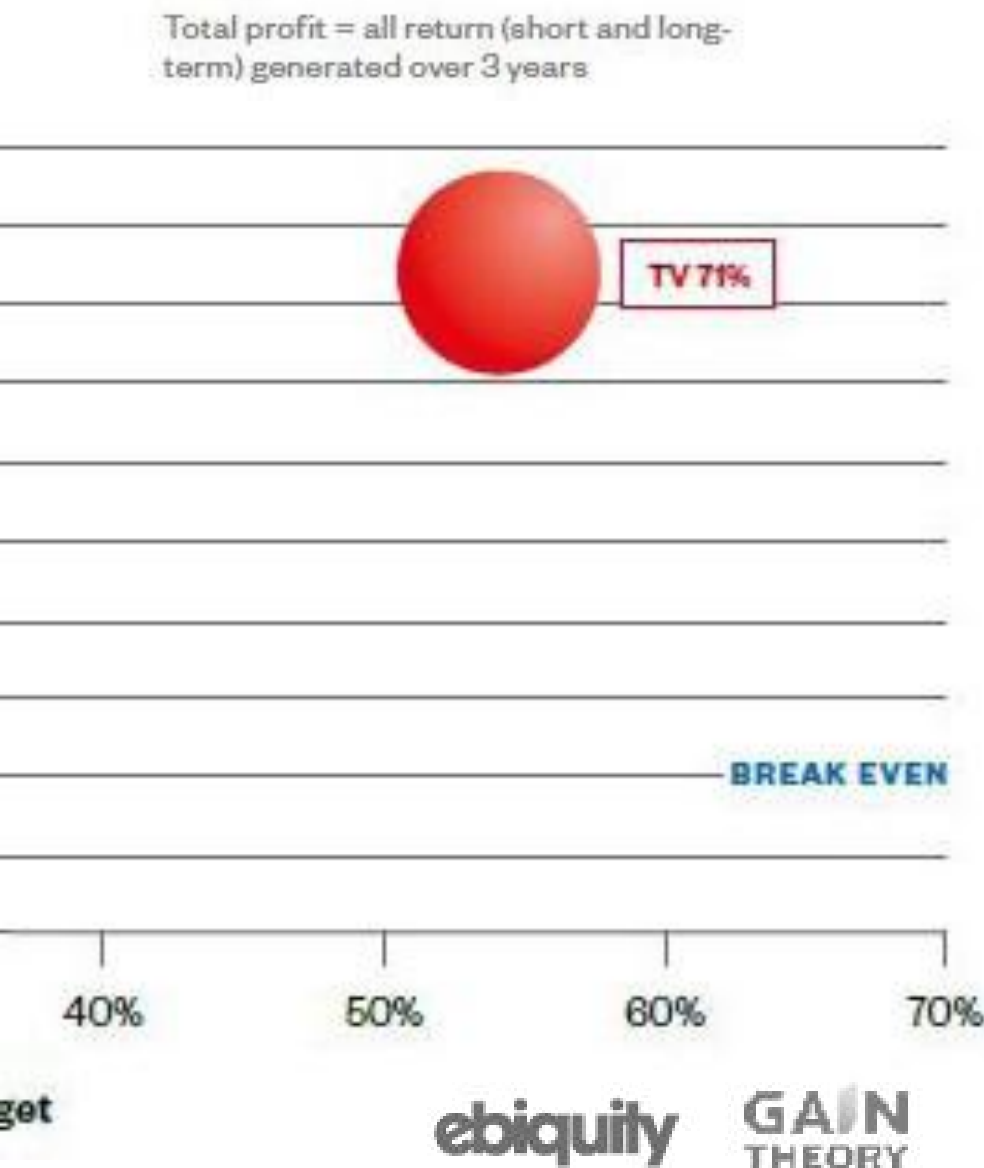
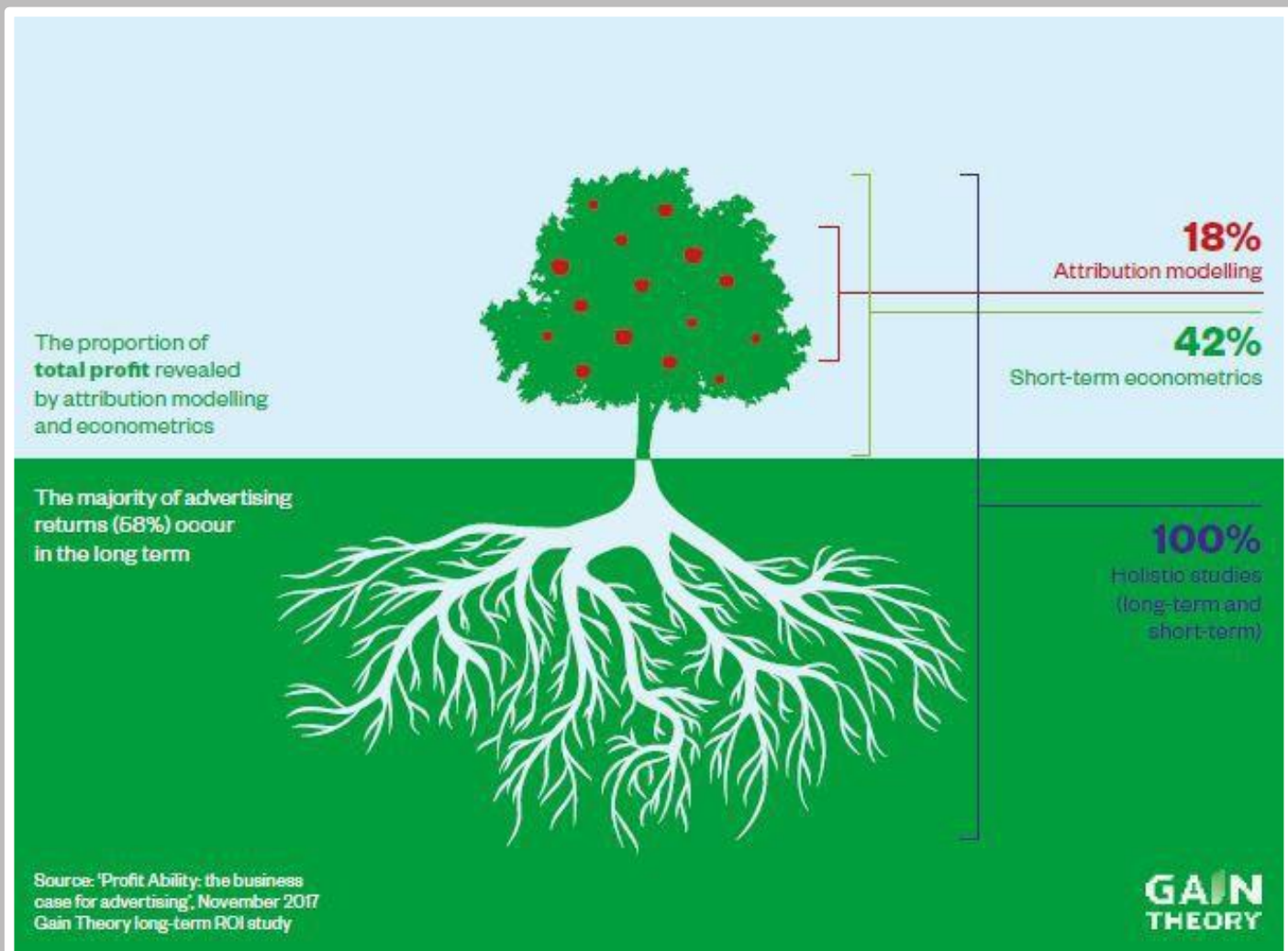


CHART 3:

58% of all media impact comes in the long term

This effectiveness chart is from the Ebiquity and Gain Theory study. It states that the majority of a company's value will come from profitable sales made in the future, and so reveals the potentially catastrophic effect on profit for brands obsessed with short-term performance. It quantifies the necessity for better balance between short, medium and long-term objectives for brands searching for sustainable profit and long-term cash flow. It's therefore essential ammunition for discussions with finance.



SECTION 5: THE TAMI AWARDS

2019 THE TAMI Ireland's TV **PLANNING** Awards

The inaugural TAMI TV Planning awards recognised and celebrated inspired uses of TV. In 2019 we were spoilt with a great standard of work showcasing some of the the most innovative and successful TV activity. Mediaworks and Lidl had cause for celebration at the inaugural TAMI Awards-Ireland's TV Planning Awards, by lifting both the Best Ongoing Use of TV award and the coveted Grand Prix. Also in the Ongoing Use of TV category, Bord Bia and Wavemaker were highly commended for their work.

O'Donnells Crisps, working with Vizeum were victorious with their entry in the Best Newcomer category. Aldi and McCann Manchester triumphed in Best Use of TV and.. category, while GoCar were winners in the Best Use of Innovation Category.

Read on to learn from the best....



Best Ongoing Use of TV award and Grand Prix.

The role that TV plays in a brands' evolution: from functional advertising to emotional brand building.

Agency: Mediaworks

Brand: Lidl

Upon launching in Ireland, perception of Lidl was low. They also were in competition with 3 large main grocery retailers who had had strong Irish sentiments links-something Lidl did not have.

The challenge to Mediaworks was simple, move Lidl from price lead functionality to emotional brand building.

Mediaworks met this challenge with a constantly evolving approach: from employing rigorous audience analysis and programming selection, to spot length evolutions, TV sponsorships, programming support and more recently, addressable TV, Mediaworks and Lidl have taken advantage of everything TV has to offer.

Moving from a model of fixed product and price ads to one built around the brand and emotion has brought the brand closer to consumers.

Since the adoption of this strategy in 2014, Lidl's market share has steadily increased. In a highly competitive category, where customer loyalty is low and without any changes to their business model, this has been an incredible result for Lidl. With TV as the lead medium across a campaign, there was an average 7% uplift after a campaign started.

How Lidl's relationship with TV has evolved over time led to this submission being highly praised by our Judges.

The role that TV has played in the brands' evolution in Ireland from function to emotional brand building was clearly demonstrated by Mediaworks





Best Newcomer

Creative use of TV sponsorship to deliver increased brand awareness and sales.

Agency: Vizeum

Brand: O'Donnells Crisps

With minimal marketing investment, O'Donnells Crisps was ranking as the 3rd biggest crisp brand in the market. However, awareness for the brand was low. To continue to meet the business expectations of organic growth (without any NPD), O'Donnells needed to grow awareness and in turn purchase consideration.

Knowing that they had to reach more mass audience with their brand communications, the answer to the brief became incredibly clear-TV. The team at O'Donnells and Vizeum decided that TV would best fit the brief. After careful consideration TV sponsorship was identified as the mainstay of the strategy. Vizeum set out to identify shows that would align with the brand's tonality while reaching its target audience. Sponsoring Greys Anatomy put the brand front of mind every week, when the target 25-44 female audience were treating themselves watching this "appointment to view" television.

For extra resonance and the greatest impact, O'Donnells created produced stings that were exclusive to the partnership and were rotated regularly. The sponsorship was amplified via social media via competitions, quizzes and sneak peaks.

The results were just what the doctor ordered!
Increased web traffic and social engagement rates and
vitaly increased sales rates by 15.6% on the previous
period and increased market share.

The judging panel commended this submission on
their collaborative approach to working with the
different stakeholders involved in this project. This
approach alongside in-depth analysis of both the
target market and the wider industry allowed
O'Donnells take the step to advertising on TV
alongside other much larger, competing brands.





Best Use of TV and....

Using TV as the linchpin of a hugely successful integrated communications plan.

Agency: McCann Manchester
Brand: Aldi

TV has been the linchpin of Aldi's marketing since its launch. At Christmas, standing out from the huge amount of Supermarket advertising is crucial. McCann Manchester's approach for Aldi was borne out of an approach to reduce a shortfall in Christmas sales- Aldi's market share showed a significant drop each Christmas. Too many of its customers were shopping elsewhere -moving to other Supermarkets that were seen as more luxurious and special for the time of year.

Tellingly the solution would not be more TV weight-as the biggest advertiser at Christmas had also experienced a significant drop in sales-but how TV could work best and how all media could work together to make the campaign as effective as possible.

To reflect the mood of customers and provide them with the fact based information (everyday necessities at lower prices) and inspiration they needed ("everyday amazing") ,planning and

buying focused on a brand spokesperson-one of the most humble, unassuming, everyday items that Aldi sells-and Kevin The Carrot was born.

The campaign was built around TV, with support via Broadcaster players. PR was key with press, digital and social media were focused on driving trade with specific product and price messaging.

The results speak for themselves-higher sales, increased market share and more specifically an increased Christmas market share (a 4.5% increase)

Whatsmore, after customer feedback, in Christmas 2017, Aldi started selling Kevin the Carrot soft toy. They sold out immediately!

The judging panel commended this submission on showing how well TV worked as the key part of an integrated communications plan.





Best Use of Innovation

The Power of TV, with the ability to target regionally.

Brand: GoCar

With car sharing services being a relatively new concept in the Irish market GoCar wanted to raise awareness and understanding of how their business model works, while also increasing sign-ups to their service. As an affordable alternative to car ownership, and therefore in competition with all modes of transport (from private cars, to buses to the Luas), GoCar were being significantly outspent by the competition. As a result, GoCar had to think smartly about how to reach the right audience with the right message. They needed to grab a share of attention, and outsmart, not outspend the competition.

GoCar knew that TV would be the most effective channel to drive awareness. However, as they only needed to target Dublin justifying a national TV campaign would be difficult. Following a strategy meeting with Open Communications, the Adsmart platform was identified as the perfect solution, offering the power of TV with the ability to target regionally. GoCar produced a 30" creative illustrating the ease as which customers can book, unlock and drive away in a GoCar. The campaign aired for 6 weeks during the summer of 2018, running alongside online search and social media activity to sustain momentum.

Adsmart enjoyed amazing results across brand and business metrics.

The TAMl judges loved this submission and how good insights at the planning level led GoCar to thinking about a new way of advertising on TV based working around their location and budgetary limits. That GoCar achieved great results with a relatively small budget made this submission all the more impressive!



SECTION 6: TOP TV MOMENTS 2019

January

Brexit-Sky News

Breaking news of Teresa May's Brexit deal defeat followed by a motion of no confidence on Jan 15th gave Sky News it's biggest audience in 3 years.

February

Dermot Bannon's Incredible Homes RTÉ

Taking his keen architect's eye to some of the most spectacular properties from around the world. The four-part series had an average viewership of 471,900. The first episode was the most watched with 555,100. (Individual, Consolidated)



Guinness Six Nations-Virgin Media One

On average 1 Million viewers watched the Ireland v. England opener in 2019. It was the best performing programme in H1 for Individuals. The Ireland games in the 2019 Championship averaged a 58% share of viewing.



March

Derry Girls-Channel 4

Season 2 of Derry Girls started in March 2019 on Channel 4. Across the 6 episodes there was a total Commercial Reach 853,000 viewers and it was the top show in the timeslot for Ad25-44 & Women 25-44. The average weekly audience of the show was up 30% yoy. Series 3 is coming soon!



April

In April 2019 it was announced that RTÉ and TG4 would partner to bring FIFA Women's World Cup to Irish screens for the first time. RTÉ and TG4 shared coverage throughout the duration of the tournament (which kicked off in June 2019) with all games free-to-air for Irish viewers

May

Game of Thrones-Sky Atlantic

After much turmoil and bloodshed across the Seven Kingdoms, the battle for the Iron Throne came to an end in May on Sky Atlantic. The final series was watched by almost half a million viewers, +57% on previous season



CBS Justice

In May Sky Media added CBS Justice to its family of TV channels available to Irish advertisers.

CBS  **justice**

June

UEFA Champions League Final -Virgin Media

The Tottenham Hotspur v. Liverpool final was the strongest performance in 10 years with viewership averaging 633,100. The match held a 55% share of viewing for Men 15-34.



July

The Open-Sky Sports Golf

Irish TV viewers were gripped by Shane Lowry's incredible cruise to victory in the British Open at Portrush in July. On the final day, viewing peaked at 175,000 as Shane lifted the Claret Jug, the highest peak audience for live Golf on Sky Sports since the Ryder Cup in 2012.



Love Island-Virgin Media

The smash hit reality series was the number one show in Ireland for Adults 15-44 in both June & July. Linear viewership averaged 304,200, up +66% YoY. Younger audiences were hooked, with a 50% share of viewing for Adults 15-34.



August

The Great British Bake Off-Channel 4

A brand-new season of innuendos, soggy bottoms, and outlandishly bright shirts is kicked off on Channel 4 in August. Over the course of the series it reached over 780,000 Irish TV Viewers with a 27% Reach for Women 25-44 and Hkkids.



September

Ladies Football Finals-TG4

New records were set both in attendance and in TV viewing for the Ladies GAA Football Final in September. There were 56,114 people in attendance; the largest-ever attendance to date at Croke Park for Ladies Football.

On TV, 666,000 tuned into TG4's coverage of the finals with an average audience of 252,500 people watching the live broadcast of the Senior Final between Dublin and Galway (a rise of over 70,000 viewers from the 2018 Ladies Football Final)



Sports Fans Benefit from Virgin Media and eir Sports Deal.

In September Virgin Media and eir agreed a deal to carry their key sports channels on each other's TV platforms. Under the agreement, Virgin Media Sport was made available to eir customers as part of the eir sport pack and in turn, eir sport was made available to Virgin Media TV customers.

Living with Lucy-Virgin Media

The show continues to deliver growth with each series. In 2019, linear viewership averaged 238,000 per episode, up +15% YoY. The show appeals to younger audiences and was number one in its slot each episode for 15-44 year old viewers in 2019



October

The Premier League-Sky Sports Football

The 18/19 Premier League season was the best on Sky Sports in over 10 yrs with a total reach of 1.1M (+8% yoy), and the average match audience +32% yoy. The current season continues to demonstrate the power of live TV with Man Utd v Liverpool on October 20th 2019 delivering Sky Sports second highest Premier League audience ever.

Darklands-Virgin Media One

The Irish crime series was the most successful VMTV Drama to date on Linear and On Demand. Linear viewership to main show averaged 235,000 per episode. In 2019 Darklands was the most streamed drama on Virgin Media's On Demand service.



Quest

In October, Sky Media added the channel Quest to its suite of TV advertising options available in Ireland.



The Rugby World Cup-Eir Sport

For the first time Eir Sport broadcast live coverage of all 48 Rugby World Cup matches.



November

The Late Late Toy Show-RTÉ One

The Late Late Toy Show maintained its place as the biggest TV programme of the year with a huge 1,540,700 viewers (Individual, Consolidated). This was the biggest year yet for The Late Late Toy show on RTÉ Player

with 233,000 streams over the weekend after broadcast. This year marked the first broadcast of the Toy Show Irish Sign Language which received an overwhelmingly positive response, as well as generating over 28,000 streams on RTÉ Player.



The Late Late Toy Show-Gay Byrne Tribute

In November 2019, Ireland lost one of its greatest ever broadcasters with the passing of Gay Byrne. In honour of Gay, RTÉ broadcast a special Late Late Show celebrating his legacy. The special episode of The Late Late Show featured interviews with guests who had special memories of Gay Byrne and footage from his many decades of broadcasting. The show was watched by over 665,800 (Individual 4+, Consolidated) people, a testament to the impact Gay Byrne had on the Irish people.



December

I'm a Celebrity Get Me Out Of Here..

This years I'm a celeb launch episode was the best ever for the show, with total views of 878,000 to ep. 1.

Across the 22 episodes, the linear viewership averaged 530,000 per episode.



SECTION 7: THOUGHTS

TV Transformed

By Fiona McCann, Sales Director Medialink

10 years ago a feature piece in The Economist hailed TV as the great survivor, praising its ability to withstand new competition ahead of other Traditional Media. A decade on it is fair to say TV has more than merely survived. Far from being some old dinosaur who refuses to accept its beating and lie down, TV is transformed. A combination of next generation technology and a rich supply of premium content and services have propelled it forward. TV has evolved to become the digital medium it always promised it could be, delivering news, drama, sports & entertainment wherever, whenever and however it's mass audience wants it.

It offers huge choice, functionality and flexibility, putting the viewer firmly in control.

Advanced TV technology, service providers and broadcasters have all stepped up to provide content and services that are now curated together for the viewer on 'Big Screen TV' in the home.

This is driving viewing back to TV and growing total set usage (+1% Vs 2008*).

Linear TV still represents the majority of TV Viewing here in Ireland (almost 80% of the average adults video day**), but of course

this new technology and a wider choice of content and services are inevitably changing viewing behaviour. Video on Demand is becoming a growing part of the overall TV landscape. First class Broadcaster VOD Services are enabling

enjoy Box Sets of their favourite shows as and when they choose. BVOD is fast becoming a mass medium in its own right. It combines with Linear TV to create a phenomenal environment for advertisers to reach large audiences. The TAM Integration Study demonstrates combined weekly reach of over 90% for All Adults and c. 84% for 1534's. A recent study from Thinkbox also showed that TV advertising accounts for 94.6% of the video advertising people actually see.

Yes the fact viewing is more fragmented is making measurement more complicated and yes the fact we still are unable to measure Linear TV and BVOD as one and at scale together is a frustration for all. However progress is being made in a number of areas to improve measurement and the delivery of advanced advertising solutions for partners.

All Irish broadcasters are collaborating through TAM to deliver a new integrated Video Panel that will measure all viewing across all screens. We will see the first data from the VISTA project in 2020. Broadcasters are also harnessing their first party data to create VOD advertising opportunities that can offer multi layered targeting for advertisers across their multiple delivery platforms.

Sky's Ad Smart innovation offers addressable solutions in its TV Homes and has introduced scores of new advertisers to TV. Ad Smart is now in Virgin Homes and is

coming to Channel 4. This means TV will become addressable on a huge scale here in Ireland with the potential for new advertisers of all sizes to harness the power of TV and deliver bespoke targeting solutions.

TV remains first for mass reach, advertising effectiveness, as a driver of short term sales and long term brand building and as an amplifier of other media right through the marketing funnel. It

is also a fully regulated, trusted, brand safe environment offering high view through rates.

Yes the challenges and threats from other media and in particular Google & Facebook remain very real as broadcasters compete for Advertising Budgets. However Broadcast TV in all its forms remains a formidable, dynamic and effective partner for advertisers. TV is far from just surviving and as it faces its next decade of evolution and innovation, it is well placed to pivot and adapt to whatever the future brings.

*Nielsen 2019/ **TAM Data Integration/** Thinkbox 2019



The Global Media

Charter

By The World Federation of Advertisers

This Charter sets out what advertisers think about the key issues faced in digital media today and identifies the steps the industry needs to take.

1. Zero tolerance to ad fraud with compensation for any breach

The industry is taking considerable steps to address ad fraud but it remains a threat. Any media investment committed by advertisers (and associated fees) found to be associated with invalid traffic / non-human impressions should be automatically refunded.

2. Strict brand safety protection

This is the fastest rising media issue on WFA members' agendas. For advertisers to invest with confidence, comprehensive and rigorous safeguards are required, with responsibility assumed by platforms for the content carried on their sites.

3. Minimum viewability thresholds

Advertisers should be able to trade against whatever viewability level delivers the required outcome for the business, including 100% in-view for full duration, if desired.

4. Transparency throughout the supply-chain

Complete transparency throughout the media supply-chain (digital or otherwise), is critically important to advertisers. Full disclosure is required for pricing & trading, fees & costs, placement, data, and other areas.

5. Third party verification and measurement as a basic

Advertisers seek media inventory which is viewable, fraud free and brand safe. Verification of whether these criteria have been met should be received from an impartial third- party source. We do not accept self-reported data.

6. Addressing 'walled garden' issues

In addition to the above 'walled gardens' issues, advertisers seek to use the licensed third-party buying platform of their choice in any and all environments. Limitations placed upon inventory and/ or data access, based on the DSP used, are not acceptable.

7. Improving standards with data transparency

The way data is collected and used by some in our industry has played a part in reducing trust in online advertising. We need a fundamental shift towards an ecosystem built on trust, control and respect for people's data.

8. Improving the user experience

Consumers are increasingly frustrated with ads that disrupt their experience, interrupt content and slow browsing.

Advertisers require platforms and publishers to optimise towards the ad formats found by the Coalition for Better Ads to be less intrusive

Cotard Delusion: A live TV Health Check

(This article is reproduced (with some changes) with thanks to RTÉ Media Sales. It is based on an article by Jenny Legge from RTÉ Audience Insights that was published in IMJ in August 2019) How many times have we heard the sweeping diagnosis, “Live TV is dead”? Often enough to cause some in the industry to refer to this diagnosis as delusion, or Cotard’s Delusion!

As a cure we offer the following consultation: Live TV viewing accounts for over two and a half hours of an adult’s time. Every. Single. Day. That’s a lot longer than your lunch break, which we’re sure isn’t dead; longer than your short hop flight to London, Paris or Barcelona which we hope isn’t dead and significantly longer than it takes to commute in and out of work-we hope!

Think WE’RE deluded?! Here comes the science bit...

Live TV viewing accounts for a big chunk of all AV viewing. We know that it’s about 65% among Adults 15+ which equates to approximately 152 minutes per adult every day!

This figure does of course vary among different channels and different age groups-with younger viewers watching less live TV than older. However, it is genre which really dictates levels of time- shifting.

Genre

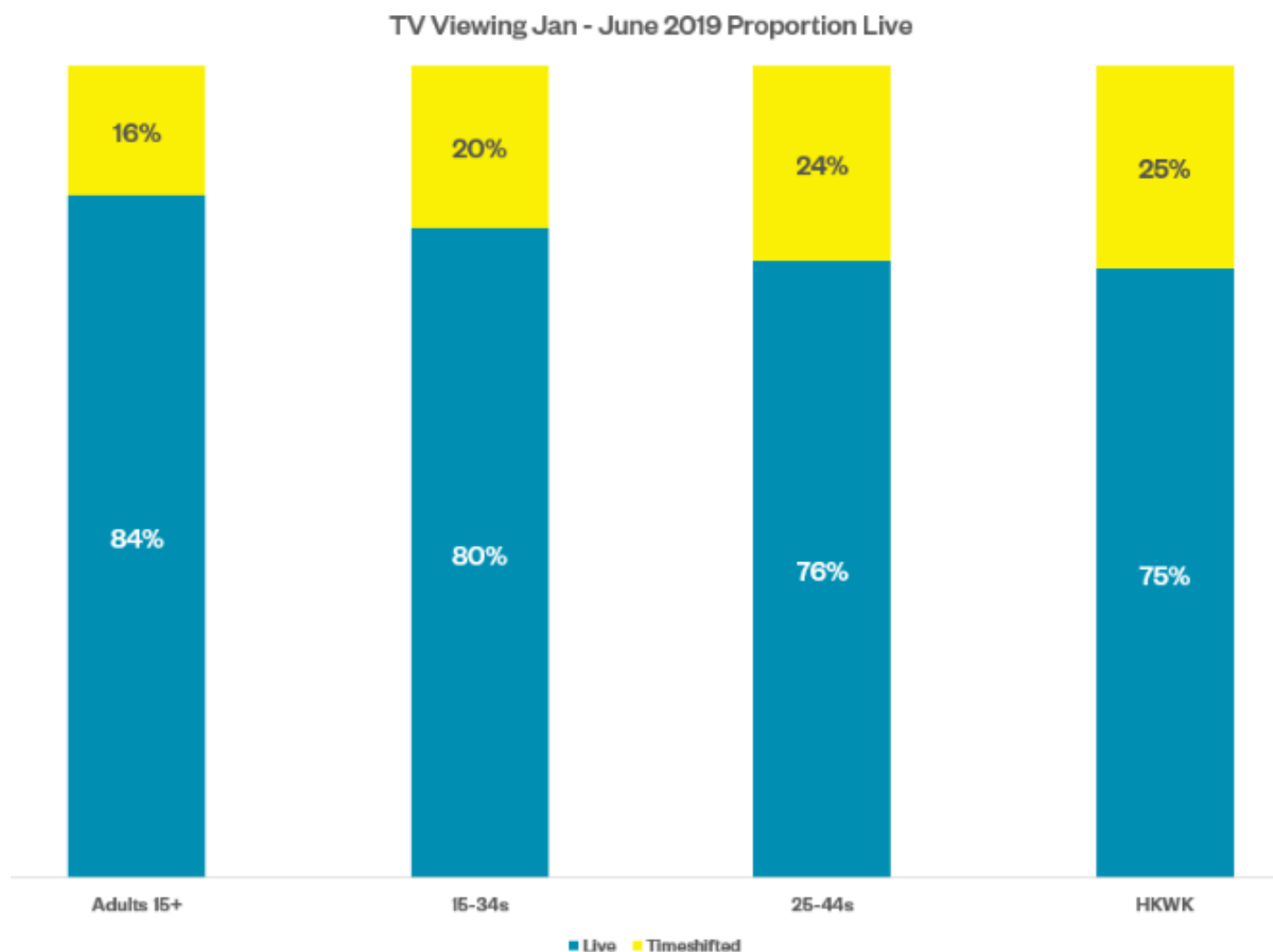
Take drama. On RTE, the first 8 episodes of Season 3 of the drama A Handmaid's tale which started airing in June were time-shifted to the tune of 54%. In other words, over half of those watching watched it after it started broadcasting. In some cases, this may have only been an hour or two later; certainly, most viewing would have happened within a day or two. Chernobyl*on Sky Atlantic was a massive time-shifted hit, where 87.5% was watched after initial transmission. Interestingly though, as word of mouth on the show spread and the ratings grew, episode on episode the % of people watching live increased.

Looking at another genre-comedy we can see it is also massively time shifted. Channel 4's popular Derry Girls was big time-shifted hit – 82% of Season 2 was watched after initial transmission.

Meanwhile sport and programmes such as news, current affairs and entertainment are much more likely to be viewed live. 89% of Ireland's Six Nation matches on Virgin Media One were viewed live, while 81% of the two Primetime Investigates episodes ("The ESB Leaks" and "Greyhounds Running for their Lives") that aired on RTÉ One in June were viewed live. It makes sense – people have different needs when they're watching this type of content and these needs best align themselves with live viewing or watching events with others as they're unfolding.

Age

If we look at the proportion of live viewing among different age groups, distinct patterns also emerge. In short, under 45s time-shift more than over 45s. However, the trend is not as pronounced as people might think. Three years ago, the average 15-34 year old watched 85% of their TV content live and now they watch 80% – hardly a seismic change.



Source: TAM Ireland Ltd./Nielsen TAM. All figures refer to Jan-Jun 2019, National, All day, All Individuals unless otherwise specified

*Chernobyl figures refer to the 9pm episode only

Advertising

So, what are the implications of all this on advertising? It is of course preferable for programmes to be viewed live; however it would be wrong to presume that time-shifted advertising is not watched. Even when programmes are pre-recorded, a significant proportion of ads are viewed in normal speed.

So, let's look again at *The Handmaid's Tale* on RTÉ2. Being a drama, and one which appeals to younger audiences, lots of time-shifting is taking place. In fact, 69% of 15-34s viewing of the first 5 episodes was time-shifted. Nevertheless, 32% of 15-34 commercial impacts (advertisements) delivered by *The Handmaid's Tale* occurred in the time-shift window. Looking again at Season 2 of *Derry Girls* (where 82% of its viewing occurred after its broadcast), 58% of the commercial impacts came from time-shifting.

Remember, these ads were viewed in full, at normal speed with the sound on, even though the programme was not being viewed live. Importantly, as the bulk of this catch-up viewing is happening within a couple of days of original broadcast, these ads are still very relevant.

So, in short, live TV viewing is in good health despite many technological advances. And medically, it's time to assign Cotard's Delusion back to the textbooks.

SECTION 8: HOW WE CAN

HELP



Newsletter:

Our monthly newsletter contains the latest news, research and information on events

www.tamireland.ie/contact



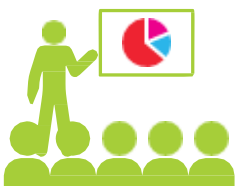
Website:

If you are looking for inspiring Irish case studies, guides on using TV, TV data, nickable charts and more visit www.tamireland.ie



Events:

We run a number of events each year from Plannervision, to the TAMIs to The Long Lunch. They are themed around the latest research and the latest topics that the industry is tackling. Our newsletter and website will keep you posted on what is coming up



Training:

We hold quarterly TV training workshops run in conjunction with Thinkbox and IAPI. These workshops are free to anyone working in an agency, broadcaster or brand marketing department.

Details of upcoming sessions can be found on our website.



