

Regional TAM Communication | Sub Market Changes in VOZ

March 2024

Decision and Next Steps:

After careful consideration and consultation with the Broadcasters, Media Federation of Australia and Nielsen TAM, the Regional TAM Board has decided to release Aggregate Market only elemental data (minute-by-minute) when VOZ becomes industry currency, Sub Markets will not be released. This decision, made on 31st January 2024, was reached after extensive discussions and analysis of various factors impacting data integrity, reliability and stakeholder interests.

We wish to reassure you that the production and release of Quarter Hour Sub Market trading files will continue to be produced and released. Furthermore, in light of the evolving viewing landscape and feedback from stakeholders, we have conducted a comprehensive methodology review.

The approach Regional TAM adopts, will enhance the integrity of our data while maintaining resilience and reliability. We believe that this new methodology approach will address the concerns raised by stakeholders and align with industry standards and best practices.

We understand the importance of transparent and reliable data for all involved in the industry. Regional TAM and Nielsen TAM are collaborating on a range of materials to support and guide the market and ensure all data users have an understanding of the review process and final decisions made for Regional TAM VOZ currency data.

Methodology Review:

As an acknowledgement of increasing pressure on TAM samples to provide very granular results, Regional TAM undertook a comprehensive methodology review. Previous panel expansion efforts in 2016 to strengthen TAM samples have been diluted by rapidly changing viewing behaviours resulting in an increasing prevalence of zero rating cells, at both a minute by minute and quarter hour level.

The objective of the methodology review was to reduce zero rating cells (thus also providing more saleable inventory) and decrease the variability between planned vs. actual campaign performance.

Questions and Feedback:

We encourage questions and feedback, please contact Donna Lennox (Regional TAM Chair) - donna.lennox@sca.com.au or Regional TAM Info regionalinfo.tam.au@nielsen.com

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Sub Market Data Impacts - VOZ Currency (Key Talking Points):

- We will still have Sub market quarter hour files for trading - the only major change is to the availability of Sub market data at a minute-by-minute level within VOZ.
- Minute-by-minute analysis will remain feasible at an Aggregate market level, where sample sizes are substantial enough to support detailed analysis.
- Sub market post analysis will continue to be possible at a quarter hour level (using Ad Intel and other internal trading systems that already utilise quarter hour files).
- We are working with OzTAM to ensure that the VOZ Gold Standard requirements have minimal impact on existing agency workflows and Third Party Software Suppliers.
- The key motivation behind this decision is to reduce zero rating cells and provide more saleable inventory - people can't buy zero audience! As an example, the new Sub market methodology Regional TAM is working towards implementing, showed up to 100% reduction in peak night zero rating cells for primary channels for key demographic People 25-54 and up to 80% reduction for multi channels.
- This will also result in less audience variation between planned vs. actual campaign results ie: greater consistency / less variability.

Data Availability Comparison - TAM Currency vs. VOZ Currency:

	TAM Currency	VOZ Currency
Trading Files	QTR HR Daily Agg 4 Weekly Sub + Reg WA	QTR HR Daily Agg 4 Weekly Sub + Reg WA
Analysis Data	Minute by Minute (Elemental) Agg + Sub + Reg WA	Minute by Minute (Elemental) Agg + Reg WA
Post Analysis	Minute by Minute (Elemental) Agg + Sub + Reg WA QTR HR Agg + Sub + Reg WA	Minute by Minute (Elemental) Agg + Reg WA QTR HR Agg + Sub + Reg WA

Agg=Aggregate Markets (Queensland, Northern NSW, Southern NSW, Victoria, Tasmania)
Sub=Sub Markets (Cairns, Townsville, Mackay, Rockhampton, Maryborough, Toowoomba, Northern Rivers, Tamworth Taree, Newcastle, Canberra, Wollongong, Orange Dubbo Wagga, Albury, Shepparton, Bendigo, Ballarat, Gippsland, Hobart and Launceston)