

# Sub Market Data Changes in VOZ - 29 Dec 24

Agency Info Pack

November 2024

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# Sub Market Data Changes

## BACKGROUND



Due to the increasing pressure on TAM samples to provide very granular results at a sub market level – Regional TAM undertook a **comprehensive methodology review**.



Previous panel expansion efforts in 2016 to strengthen TAM sample sizes have been diluted over the years by the rapidly **changing viewing behaviours** resulting in an increasing prevalence of zero rating cells.



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

# Sub Market Data Changes

## REVIEW



Nielsen TAM in conjunction with Regional TAM investigated various different methodology approaches - **global review!**



Regional TAM **board approved** (31 Jan '24) a **Sub Market Factored** approach to Quarter Hour trading files into VOZ. \*Note: No change to Regional WA



Generated numerous data analyses that underwent **thorough review** by the Technical Review Committee and broadcasters.

# Sub Market Data Changes

## OUTCOME

There will be **no change** to  
**Aggregate Market or Regional  
WA** outputs!

**Implemented 29th December 2024, when VOZ becomes Currency**



**Submarket Quarter Hour data** will continue to be produced and made available using a **new methodology** aimed at reducing the variability in audience estimates and the number of zero rating cells.



**Submarket Elemental (minute by minute) data** will **no longer be available**.

- ✗ No longer able to perform Reach & Frequency analyses at the Submarket level
- + Submarket post analysis (Audience/TARPS) will be available at a Quarter Hour level only.



VOZ Submarket **Quarter Hour Trading Demographics** will change:

- ✗ Removal of Total Households and Total Grocery Buyers
- + Addition of People 55+, Men 55+ and Women 55+



The transition to the factored methodology for Sub Markets from 2025 will result in a **complete trend break**. **Under no circumstances** should the VOZ Factored Sub Market data be compared against prior year performances that were using the old methodology.

# Sub Market Data Changes

## DELIVERY SCHEDULE TRANSITION



Delivery Schedule update for Quarter Hour Files  Daily Aggregate Market Delivery from 9am to 11:30am  Sub Markets/Regional WA Delivery from Tuesday to Wednesday  * Delivery time is subject to TPSS production/ processing timing.	TAM Currency				TAM outputs into VOZ Currency			
	Quarter Hour		Elemental Minute by Minute		Quarter Hour		Elemental Minute by Minute	
	Trading Files	Campaign Pre/Post Analysis	Analysis Data in TPSS*	Campaign Reach & Frequency	Trading Files	Campaign Pre/Post Analysis	Analysis Data in TPSS*	Campaign Reach & Frequency
Aggregate Markets Queensland, Northern NSW, Southern NSW, Victoria, Tasmania	Daily 9.00am	Daily 9.00am	Daily 9.00am	Daily 9.00am	Daily 11.30am	Daily 11.30am	Daily 11.30am	Daily 11.30am
Sub Markets Cairns, Townsville, Mackay, Rockhampton, Maryborough, Toowoomba, Northern Rivers, Tamworth Taree, Newcastle, Canberra, Wollongong, Orange Dubbo Wagga, Albury, Shepparton, Bendigo, Ballarat, Gippsland, Hobart, Launceston	4 Weekly Tue	4 Weekly Tue	Daily	Daily	4 Weekly Wed	4 Weekly Wed	N/A	N/A
Regional WA	4 Weekly	4 Weekly	Daily	Daily	4 Weekly Wed	4 Weekly Wed	Daily	Daily

# Sub Market Data Changes

## VOZ TRADING DEMOGRAPHICS

For the complete list of VOZ demographics, please check [VirtualOz.com.au](https://VirtualOz.com.au)

- ▶ In VOZ Regional, there are a total of:
- **74x** Aggregate Market Trading Demographics
  - **63x** Tasmania Demographics
  - **24x** Sub Market\* Demographics
  - **24x** Regional WA Demographics

- ▶ VOZ Sub Market/Regional WA Trading Demographic changes:

**2x removed:** Total Households and Grocery Buyers

**3x added:** People 55+, Men 55+ and Women 55+

- ▶ Regional WA and Sub Market\* demographics are now aligned.

*\*Please note Sub Markets are only available in Qtr Hr Trading Files (not available in VOZ database or R&F Portal).*

### VOZ Sub Market and Regional WA Trading Demographics

Total Individuals	People 40+
Total Grocery Shopper 13+	Men 40+
Grocery Shopper 18+	Women 40+
People 16+	People 25-54
Men 16+	Men 25-54
Women 16+	Women 25-54
People 25+	People 16-54
Men 25+	Men 16-54
Women 25+	Women 16-54
People 16-39	<b>People 55+</b>
Men 16-39	<b>Men 55+</b>
Women 16-39	<b>Women 55+</b>

# Sub Market Data Changes

## METHODOLOGY

Regional TAM will implement a **refined methodological approach** for producing Sub Market data when VOZ becomes currency on **December 29, 2024**.

Sub Market Quarter Hour data will be produced by first **calculating the total Aggregate Market audience** within VOZ and then **factoring this figure accordingly**.

The underlying Regional TAM panel will **continue to be representative of the population**, with minimum sample sizes to be maintained in all Sub Markets.

Below is an example of a Sub Market audience estimate calculated by factoring an Aggregate Market Audience of 50,000 people, based on the proportion of population in each Sub market.

Market	Universe Estimate	Factored %		Average Audience
Queensland	1,967,000	100%		50,000
Maryborough	694,600	35.3%	▶	17,650
Toowoomba	321,400	16.3%	▶	8,150
Cairns	271,000	13.8%	▶	6,900
Townsville	245,800	12.5%	▶	6,250
Rockhampton	239,900	12.2%	▶	6,100
Mackay	195,000	9.9%	▶	4,950
Northern NSW	2,312,700	100%		50,000
Northern Rivers	1,083,900	46.9%	▶	23,450
Newcastle	863,800	37.4%	▶	18,700
Tamworth Taree	365,100	15.8%	▶	7,900
Southern NSW	1,589,200	100%		50,000
Canberra	595,500	37.5%	▶	18,750
ODW	435,400	27.4%	▶	13,700
Wollongong	558,300	35.1%	▶	17,550

Market	Universe Estimate	Factored %		Average Audience
Victoria	1,265,000	100%		50,000
Ballarat	377,000	29.8%	▶	14,900
Gippsland	251,700	19.9%	▶	9,950
Bendigo	251,500	19.9%	▶	9,950
Albury Wodonga	203,600	16.1%	▶	8,050
Shepparton	181,200	14.3%	▶	7,150
Tasmania	556,600	100%		50,000
Hobart	290,100	52.1%	▶	26,050
Launceston	266,600	47.9%	▶	23,950
Regional WA	565,120	100%		50,000
No Sub Markets = No Factoring required.				

\*Total People Universe Estimates based on 2024 TAM



# VOZ Demographic Universe Estimates Proportion %

## NORTHERN NSW 2024 EXAMPLE

➤ The Sub Market Factoring Methodology utilises the **proportion** of each **Sub Market's Universe Estimate (UE)** within it's respective **Aggregate Market**; this **percentage** is then used to calculate the factored result from the Aggregate Audience.

➤ **Example:** If Northern Rivers makes up 47% of the NNSW UE for Total People, then the VOZ Qtr Hr Total People Audience result for that Sub Market will be calculated by factoring, or multiplying, the NNSW Audience result by 47%.

➤ The UE Proportion % will also **vary between different Demographics**, as the methodology takes into account **both** the **Sub Market** and the **specified Demographic** to calculate the UE.

Market	Total People		People 16-54	
	UE	% UE	UE	% UE
Northern Rivers	1,083,900	46.9%	521,800	47.7%
Newcastle	863,800	37.4%	419,400	38.3%
Tamworth Taree	365,100	15.8%	153,200	14.0%
NNSW Aggregate	2,312,800	100%	1,094,400	100%

# VOZ Qtr Hr Factored Data | Audience Calculation

## NORTHERN NSW 2024 EXAMPLE

- ▶ The methodology for Sub Market Qtr Hr data works by first calculating the total Aggregate Market Audience and then factoring this figure according to the population, or **Universe Estimate**, of each Sub Market.
- ▶ This results in data that is both reflective of **Regional Aggregate Market Viewing Behaviour** as well as **the relative UE of each Sub Market and Demographic**, and therefore will be different from the existing Currency data for Sub Markets.

Northern NSW Total People  
Average Audience = 50,000

Northern Rivers Total People  
% of Universe Estimate = 46.9%

Northern Rivers Total People  
Qtr Hr Factored Average Audience

$$50,000 \times 46.9\% = 23,500$$

# VOZ Qtr Hr Factored Data | Shares & TARPs

## NORTHERN NSW 2024 EXAMPLE


- ▶ Contrary to the changes for Average Audience, **Shares** and **TARPs** will **remain consistent** across each Sub Market.
- ▶ As the Audience is Factored to the Aggregate Market, each Sub Market will have the **same proportion of viewing for each Demographic** as a result. This means that each Sub Market will have the **same Primary Share, Commercial Share,** and **TARP** as their **Aggregate Market**.

	PRIMARY SHARE %						TARP %					
Market	Seven		NBN Nine		WIN Ten		Seven		NBN Nine		WIN Ten	
	Currency	Factored	Currency	Factored	Currency	Factored	Currency	Factored	Currency	Factored	Currency	Factored
Northern Rivers	38%	34%	43%	50%	19%	16%	1.4	1.9	1.8	3.1	0.7	0.9
Newcastle	26%	34%	59%	50%	15%	16%	1.8	1.9	4.5	3.1	1.1	0.9
Tamworth Taree	45%	34%	40%	50%	15%	16%	3.5	1.9	3.5	3.1	1.2	0.9
Northern NSW Aggregate	34%	34%	50%	50%	16%	16%	1.9	1.9	3.1	3.1	0.9	0.9

## FURTHER INFORMATION

- For more information on the changes, please visit [regionaltam.com.au](https://regionaltam.com.au).

- ▶ The Ratings Resource section includes information on the changes from the notifications that have been distributed to the industry, as well as the 2025 Trading Survey Calendar.



## Regional TAM Communication | Sub Market Data Changes in VOZ

June 2024 #1

Following the introduction of the changes to future Regional TAM Sub Market data sets when VOZ becomes industry currency, we would like to provide details of the VOZ Quarter Hour trading demographics that will be available for use.

There will be **24 x VOZ Sub Market** trading demographics, with the inclusion of 3 additional demographics: People 55+, Men 55+ and Women 55+. Total Households and Grocery Buyers will be removed.

There will be **no change** to the delivery of the file: Sub market OR average file is supplied as a 4 weekly by Periodic Survey. Sub market OR files are not supplied for Weeks 1 and 2 of the year, as well as the Easter period.

The below table details the existing TAM demographics and the new VOZ demographics for Regional TAM Quarter Hour trading data files:

Sub Market QH H: Trading TAM Currency: 23 Demographics	Sub Market QH H: Trading VOZ Currency: 24 Demographics
Total Individuals People 18-39	Total Individuals People 18-39
Total Households Men 18-39	Total Households Men 18-39
Grocery Buyers Women 18-39	Grocery Shoppers 18+ Women 18-39
Quarter Hour Shopping 18+ Grocery Shoppers 18+ Men 18-39	People 18+ People 25-34 Men 18-39
People 18+ Men 18-39	Women 18+ Women 25-34 People 25+ People 54+
People 18-39 Men 18-39	Women 25+ People 25+ Men 25+
People 25+ Women 18-39	Women 25+ People 25+ Men 25+
Men 25+ People 40+	People 25+ People 40+
Women 25+ Men 40+	Men 40+ Women 40+
Women 40+	Women 40+

There will be **no change** to existing **Quarter Hour data file formats** ingested into Third party software

Regional TAM VOZ sub market quarter hour **Back Data** files are pushed in from **Week 29 (Survey 6)**, 2022, ensuring a comprehensive historical perspective for stakeholders.

For further information on VOZ Demographics - [www.tvnathan.com.au/resources/voz-demographics](https://www.tvnathan.com.au/resources/voz-demographics)

Please contact Regional TAM Info [regional.tam@nathan.com.au](mailto:regional.tam@nathan.com.au) with any questions or feedback.

## Changes in VOZ | Methodology

Methodological approach for producing Sub Market data sets for the quarter ending 29th June, 2024. While the previous panel expansion in 2019 rapidly changing viewing behaviours have led to an increase in 4-hour metrics.

Quarter hour data will be produced by first calculating the total VOZ and then factoring this figure according to the demographic. There will be no change to Aggregate Market ( Queensland, and Tasmania) and Regional WA data outputs.

As will continue to be representative of the population, with red in it as Sub Market panel data will be integral for

red audience estimate calculation by factoring an Aggregate based on the proportion of population in each demographic

Population	Viewers	Households	Female	Male
96,000	1,200,000	1,000	96,000	96,000
17,000	217,000	10,000	14,000	3,000
6,150	80,000	21,700	6,000	6,000
6,800	80,000	21,000	10,000	6,000
4,500	40,000	23,000	10,100	6,000
6,100	70,000	18,200	14,000	7,000
4,500	20,000	100,000	10,000	10,000
10,000	100,000	10,000	10,000	10,000
23,400	230,000	10,000	23,400	23,400
16,700	160,000	23,000	16,700	16,700
7,000	70,000	10,000	7,000	7,000
Regional WA: 66,100 100,000 10,000				
Sub Markets: 100,000 100,000 10,000				

Q12023	96,000	1,200,000	1,000	96,000	96,000
Q2023	430,400	470,000	10,000	430,400	430,400
Q3023	500,000	500,000	10,000	500,000	500,000

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## 2025 VOZ Regional TAM Sub Market Trading Survey Calendar

Survey	Week No.	Sunday to Saturday		Sub Market* Quarter Hour File Overnight Data Release Date	Sub Market* Quarter Hour File Consolidated 7 Data Release Date
Summer	1	29 Dec	04 Jan	WEEK 1 & 2 EXCLUDED	
	2	05 Jan	11 Jan		
	3	12 Jan	18 Jan		
	4	19 Jan	25 Jan		
	5	26 Jan	01 Feb		
	6	02 Feb	08 Feb	Wed, 12 Feb	Wed, 19 Feb
1	7	09 Feb	15 Feb		
	8	16 Feb	22 Feb		
	9	23 Feb	01 Mar	Wed, 12 Mar	Wed, 19 Mar
	10	02 Mar	08 Mar		
2	11	09 Mar	15 Mar		
	12	16 Mar	22 Mar		
	13	23 Mar	29 Mar	Wed, 09 Apr	Wed, 16 Apr
	14	30 Mar	05 Apr		
3	15	06 Apr	12 Apr	Wed, 21 May	Wed, 28 May
EASTER	16	13 Apr	19 Apr	EASTER DATA EXCLUDED	
	17	20 Apr	26 Apr		
3	18	27 Apr	03 May		
	19	04 May	10 May	Wed, 21 May	Wed, 28 May
	20	11 May	17 May		
4	21	18 May	24 May		
	22	25 May	31 May		
	23	01 Jun	07 Jun	Wed, 18 Jun	Wed, 25 Jun
	24	08 Jun	14 Jun		
5	25	15 Jun	21 Jun		
	26	22 Jun	28 Jun		
	27	29 Jun	05 Jul	Wed, 16 Jul	Wed, 23 Jul
	28	06 Jul	12 Jul		
6	29	13 Jul	19 Jul		
	30	20 Jul	26 Jul		
	31	27 Jul	02 Aug	Wed, 13 Aug	Wed, 20 Aug
	32	03 Aug	09 Aug		
7	33	10 Aug	16 Aug		
	34	17 Aug	23 Aug		
	35	24 Aug	30 Aug	Wed, 10 Sep	Wed, 17 Sep
	36	31 Aug	06 Sep		
8	37	07 Sep	13 Sep		
	38	14 Sep	20 Sep		
	39	21 Sep	27 Sep	Thu, 09 Oct	Thu, 16 Oct
	40	28 Sep	04 Oct		
9	41	05 Oct	11 Oct		
	42	12 Oct	18 Oct		
	43	19 Oct	25 Oct	Wed, 05 Nov	Wed, 12 Nov
	44	26 Oct	01 Nov		
10	45	02 Nov	08 Nov		
	46	09 Nov	15 Nov		
	47	16 Nov	22 Nov	Wed, 03 Dec	Wed, 10 Dec
	48	23 Nov	29 Nov		
Summer	49	30 Nov	06 Dec		
	50	07 Dec	13 Dec	Wed, 31 Dec 2025	Wed, 07 Jan 2026
	51	14 Dec	20 Dec		
	52	21 Dec	27 Dec		

# Sub Market Data Changes

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On behalf of

