TOTAL TV VIEWING

"TV isn't dying, it is having babies" (Bob Hoffman)







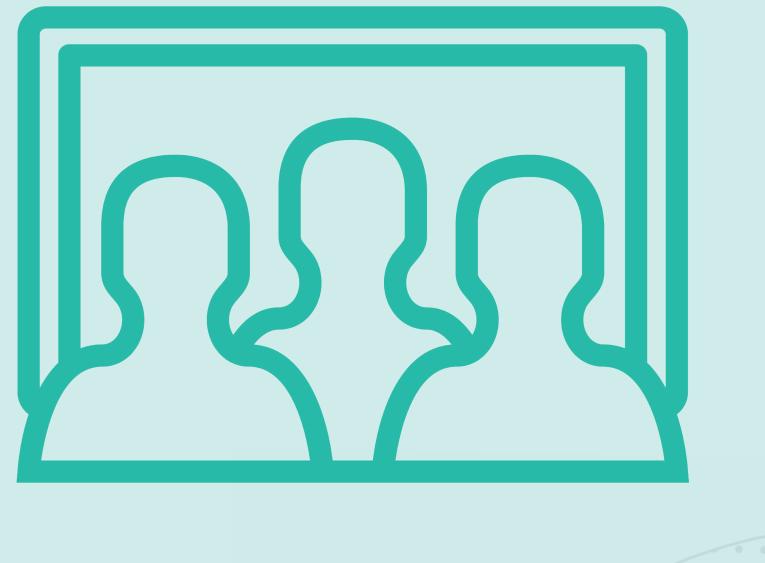
Total TV is the powerful combination of broadcast (linear) TV, live streaming of TV content and Broadcaster Video on Demand (BVOD).

And it reaches 8 out of 10 New Zealanders 15+ **EVERY** week.

Source: Nielsen Consumer Media and Insights Q2 2022 – Q1 2023. All People 15+. Weekly reach: Watched Broadcast TV (free to air or paid) at least once a week, or, used an NZBVOD Platform* in last 7 days. *NZ BVOD Platform = TVNZ+ or ThreeNow or Sky GO or Sky Sport Now or MAORI+ or Prime Catch-up or Freeview OnDemand







Source: Nielsen Consumer and Media Insights Q2 2022 – Q1 2023 All People 15+. Watched Broadcast TV Free-to-Air or Paid at least weekly Source: Nielsen Consumer Media and Insights Q2 2022 – Q1 2023. All People 15+. Weekly reach: Watched Broadcast TV (free to air or paid) at least once a week, or, used an NZBVOD Platform* in last 7 days. *NZ BVOD Platform = TVNZ+ or ThreeNow or Sky GO or Sky Sport Now or MAORI+ or Prime Catcwh-up or Freeview OnDemand



BVOD and Streaming extend that reach to **3.4 Million** every week! • 1.6 million 25 to 54 • 1.1 million 18 to 39



TOTAL TV REACHES AUDIENCES ACROSS **ALL AGES AND STAGES - EVERY WEEK**



HHS with Kids

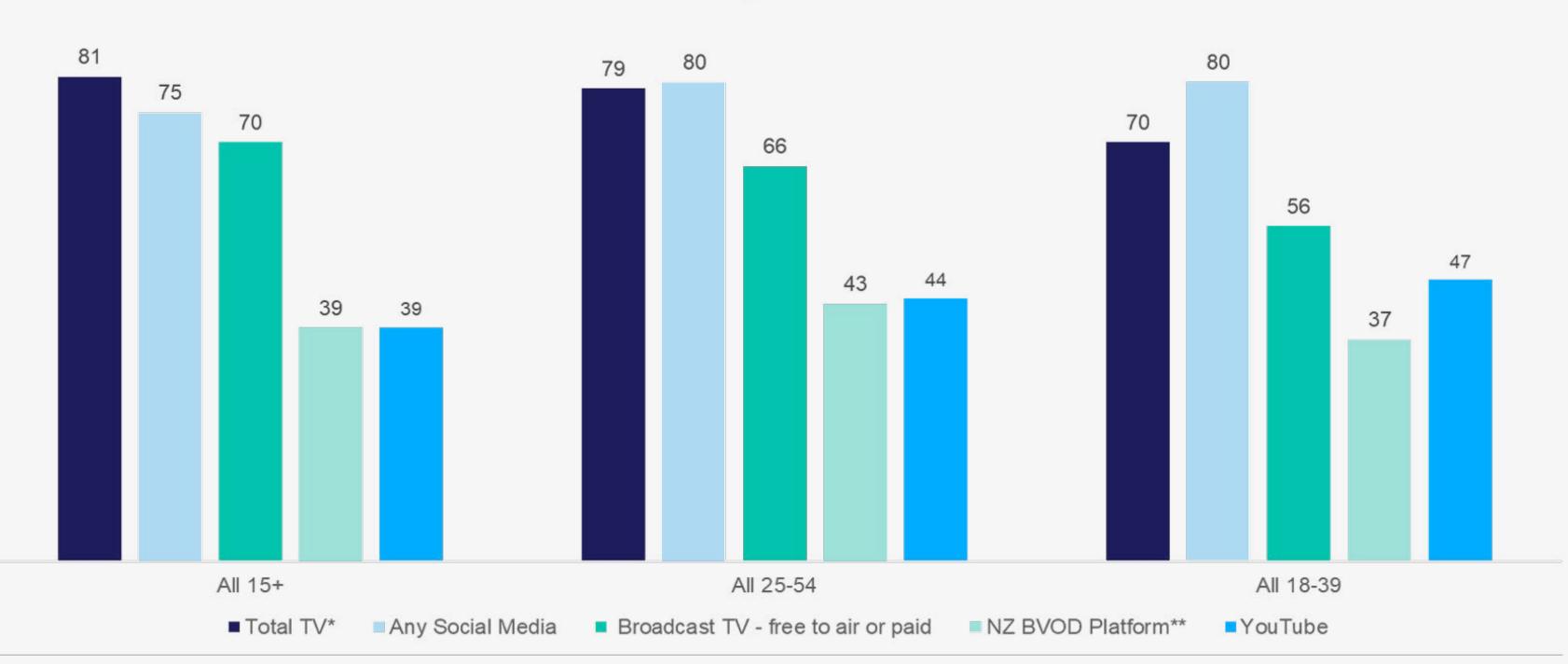
Males

Source: Nielsen Consumer Media and Insights Q2 2022 – Q1 2023. All People 15+, various demos. Total TV - Watched Broadcast TV (free to air or paid) at least once a week, or, used an NZBVOD Platform* in last 7 days. *NZ BVOD Platform = TVNZ+ or ThreeNow or Sky GO or Sky Sport Now or MAORI+ or Prime Catch-up or Freeview OnDemand

25-54 0	Females 25-54
70	ŎZ/o



TOTAL TV REACHES MORE NEW ZEALANDERS EACH WEEK THAN OTHER AD-SUPPORTED VIDEO AND SOCIAL PLATFORMS



Source: Nielsen Consumer Media and Insights Q2 2022 – Q1 2023. All People 15+. Weekly reach: *Total TV - Watched Broadcast TV (free to air or paid) at least once a week, or, used an NZBVOD Platform* in last 7 days. *NZ BVOD Platform = TVNZ+ or ThreeNow or Sky GO or Sky Sport Now or MAORI+ or Prime Catch-up or Freeview OnDemand Engage with Social Media at least weekly. Used YouTube last 7 days.

Weekly Reach %

Think





Sources: 1. Nielsen Consumer and Media Insights Q2 2022 – Q1 2023. Any TV in the home; Connected TV or Chromecast device 2. Google Analytics/Adobe Analytics June 2023. Average – Streams endpoints – TVNZ+ / ThreeNow.

THE TV SET REMAINS THE DOMINANT VIEWING DEVICE

- 96% of us have a TV in the home¹
- 64% have the ability to watch internet delivered content on their CTV screen¹

 Within the BVOD environment²,
 70% of streams are viewed via the CTV set with 20% via Mobile 10% via Desktop/Laptop





VIFWFRS SPFND A SIGNIF **ININT OF TIMF WATCHING TV EVERY DAY**

· All People 5+ 3 hours 51 minutes

· 25-54 **3 hours 9 minutes**

· 18-39 2 hours 34 minutes





LOCAL CONTENT

On average each month, local programmes reach...

- · All People 5+ 2.9 Million
- · All People 25-54 **1.2 Million**
- · All People 18-39 600,000

Source: Nielsen Television Audience Measurement. Monthly Average across February – July 2023. Cumulative Reach All People 5+, All People 25–54, All People 18–39 – 000's. Channels - All TVNZ, All Warner Bros. Discovery; Prime; Sky Advertising Channels. All locally produced shows - classified as "NZ" - excluding News, Sport and Children's. Excluding programming classified as Te Reo.

















NEWS

Every night of the week, the News Hour reaches over 1.3 Million New Zealanders.

In 2023 audience reach increased by 29% among 18–39's across 5 significant news events*

- All People 5+**1.3 Million**
- All People 25-54
 443,000
- All People 18-39
 167,000





SPORT

Sport has strong linear audiences:

- The Women's Rugby World Cup reached over 1.8 million
- · FIFA Women's World Cup reached over 2 million
- · All Blacks Rugby Championship reached 1.3 million
- T20 Black Clash reached almost 1 million

Sources: 1. Nielsen Television Audience Measurement, Three* (Three and Three+1) Women's Rugby World Cup total Coverage, 8th October – 12th November 2022, Cumulative Reach All People 5+. 2. Nielsen Television Audience Measurement, Sky Sport 1, Prime* (Prime and Prime+1), FIFA Women's World Cup, total coverage 20th July – 20th August 2023, Cumulative Reach All People 5+ 3. Nielsen Television Audience Measurement, Sky Sport 1 / Prime* (Prime and Prime+1), All People 5+, Cumulative Reach, All Blacks Matches 09.07.2023. 15.07.2023; 29.07.2023 4. Nielsen Television Audience Measurement, TVNZ1* (TVNZ and TVNZ1+1), All People 5+, Reach, 20 January 2023, 18:30–22:30, 976,000













REALITY TV FAVES

- Married at First Sight Australia and MasterChef Australia both reached more than 1.8 Million viewers¹
- Each of these Reality juggernauts were in the **Top 5 most streamed** shows on their respective BVOD platforms².
- Love Island UK was streamed by over 175,000 users and generated more than **6.5 Million Streams³**









Think

Total TV is the powerful combination of broadcast (linear) TV, live streaming of TV content and Broadcaster Video on Demand (BVOD).

ADS ON TV (LINEAR OR BVOD) ARE MORE LIKELY TO BE REMEMBERED FOR LONGER.

Ads on TV keep working to drive a sales impact for 109 days



Source 3

Source 3

compared with YouTube at 8 days and Facebook at just 6 days.

TV DRIVES SEARCH.



than the paid media average in driving search for advertisers.

BVOD ads have stronger memory recall than any form of YouTube video advertising with

1.3x greater unprompted recall.

And 4.7x better than Facebook.

LIVE STREAMING **CONTINUES TO GROW** with an average of 7,300,000 sessions a month.



Source 4

Source 9

premium video or

Source 1: Nielsen Television Audience Measurement, All People 5+, Total TV (Linear), Jan-Jun 2023. Source 2: Nielsen Consumer and Media Insights Q2 2022 – Q1 2023. CTV = Connected TV or Chromecast device. Source 3: Professor Karen Nelson-Field, Benchmark Series. Source 4: Ipsos The Impact of TV 2020 Source 5: Online survey 18+ Apr 2022 Source 6: NZ Agency data - average across 3 NZ agencies - CPT all people 18+. Ocy 2020 Source 7 : Google Ad Manager; TVNZ and Discovery New Zealand. Source 8 : Kantar – TVNZ Research. Source 9: Google Analytics, Ap 13+, Aug 21 - Jul 22.

TV HAS UNBEATABLE REACH.

ሱሱሱሱ More than 3/4 of every month.

Linear TV reaches 3.7 million NZers every month, 2.9 million every week and 1.9 million every day.

NZ TV viewers spend nearly 4 hours watching broadcast TV every day

compared to NZ online viewers that

TV CREATES ACTION.



50% of viewers report taking action



NZers engage with TV

1.6 million **New Zealanders** engage with NZ BVOD

89% of linear TV is

Which means that the majority of

watched live.

every week.

Source 1



Ownership of streaming enabled TVs continues to grow with

64[%] of homes in NZ now enabled with a CTV.

TV ADVERTISING ON ANY SCREEN RESULTS IN A BIGGER SALES EFFECT.



BVOD and linear TV advertising is

100[%] viewable, 100[%] of the time

driving more attention and sales than platforms with limited screen coverage.

BVOD ADS ARE WATCHED TO COMPLETION.

On ad supported BVOD platforms, ads are more likely to be viewed to the end with a

Any content that goes to air is highly regulated, professional produced and must meet strict broadcasting standards.

spend 2 hours and 4 minutes watching online video. advertising on Linear TV is non skippable. Source 1 Source 1 **TV ADVERTISING GIVES YOU THE BEST BANG FOR BUCK.** For every dollar you spend on linear TV you get 50% 96[%] average more impressions completion rate. directly linked to a TV ad they had seen. than youtube Source 5 Source 6 Ads on TV in any format command more attention. TV is a safe space Building one minute of ad attention for your brand. requires only 12 mins on LINEAR TV/ YouTube facebook BVOD **58**% 31% **4**% 31:57 mins on YouTube and 5 hours on social video. Source 3 Source 3

thinktv.co.nz





