

Media Buyers & Influencers

Key Measures

March 2011



Overall...

Free To Air TV currently performs well as a medium amongst Media Buyers and Influencers

In particular:

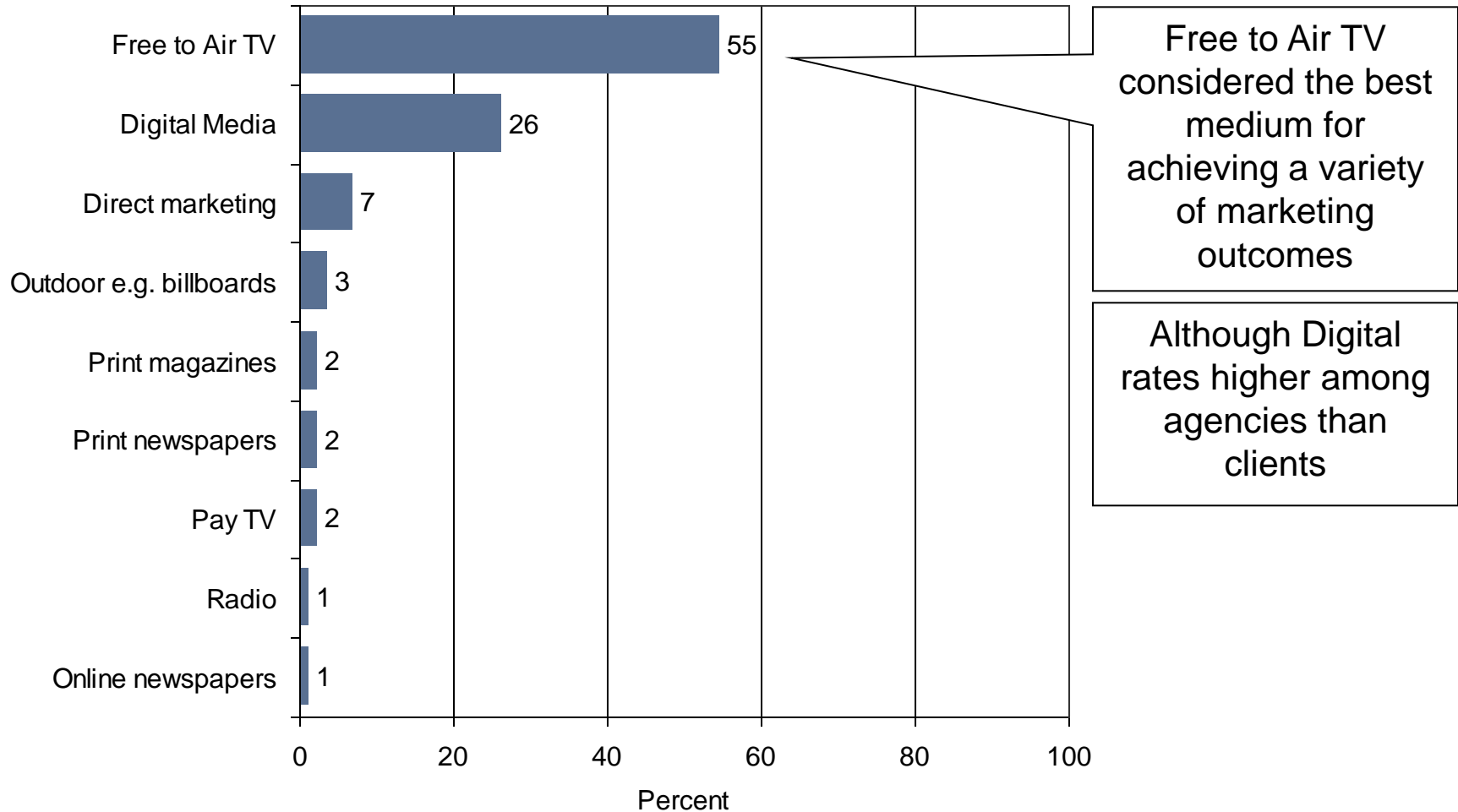
- Considered the best medium for achieving a range of marketing outcomes
- Offers strong and unique benefits around reach and frequency
- Conveys a sense of campaign scale
- Plays a vital role in the media mix – improving other media performance

However:

- Digital and Direct Marketing seen to be more measureable and accountable
- Stronger future opportunity for Digital, from the perspective of Media Buyers

Free To Air TV Tops Media Buyers' Perceptions

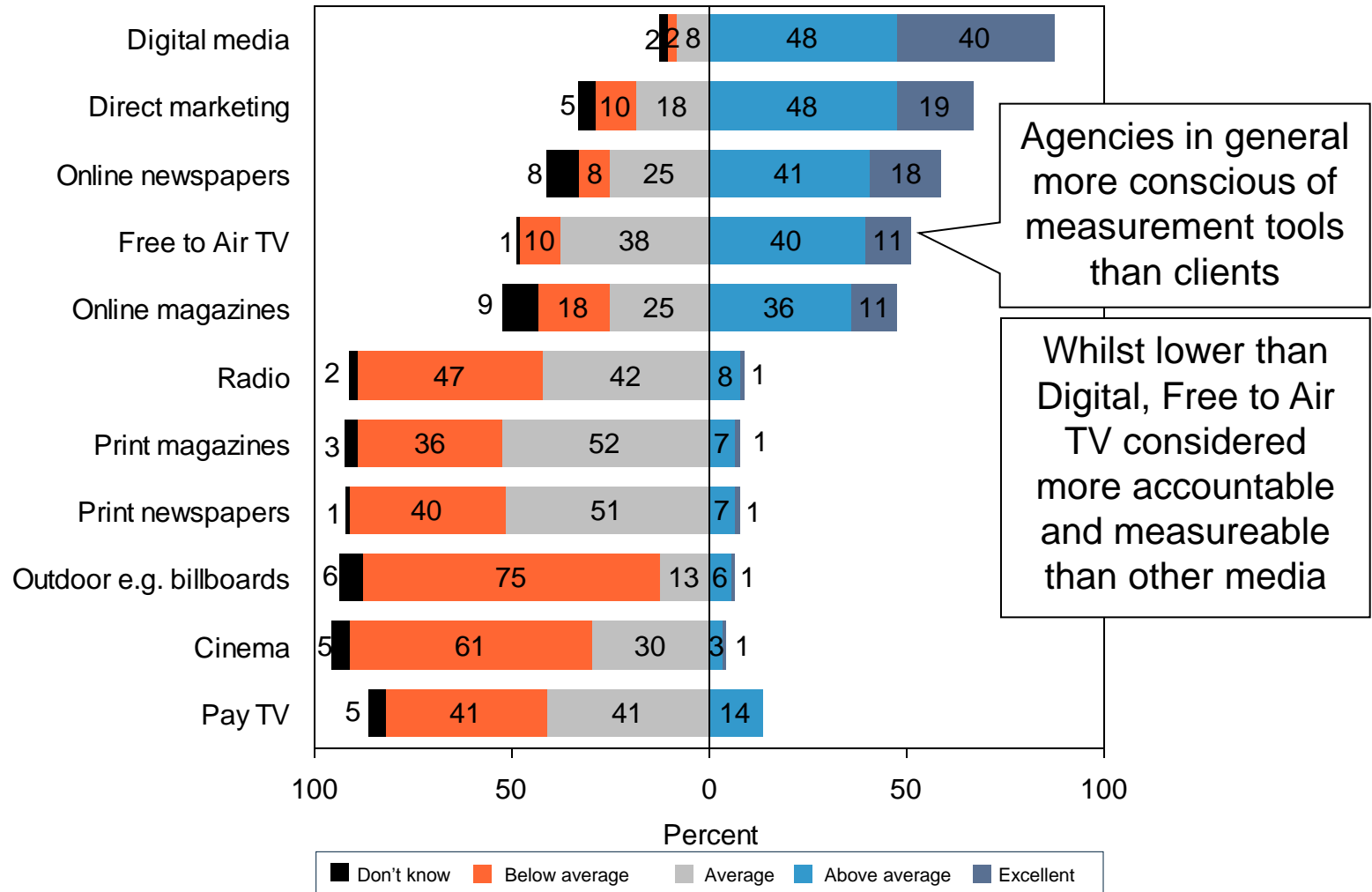
Best Medium In General



Note: Online Magazines and Cinema received zero ratings
Base: Total Sample N=88

Digital Most Accountable & Measureable

Perceived Accountability and Measurement of Media Mediums

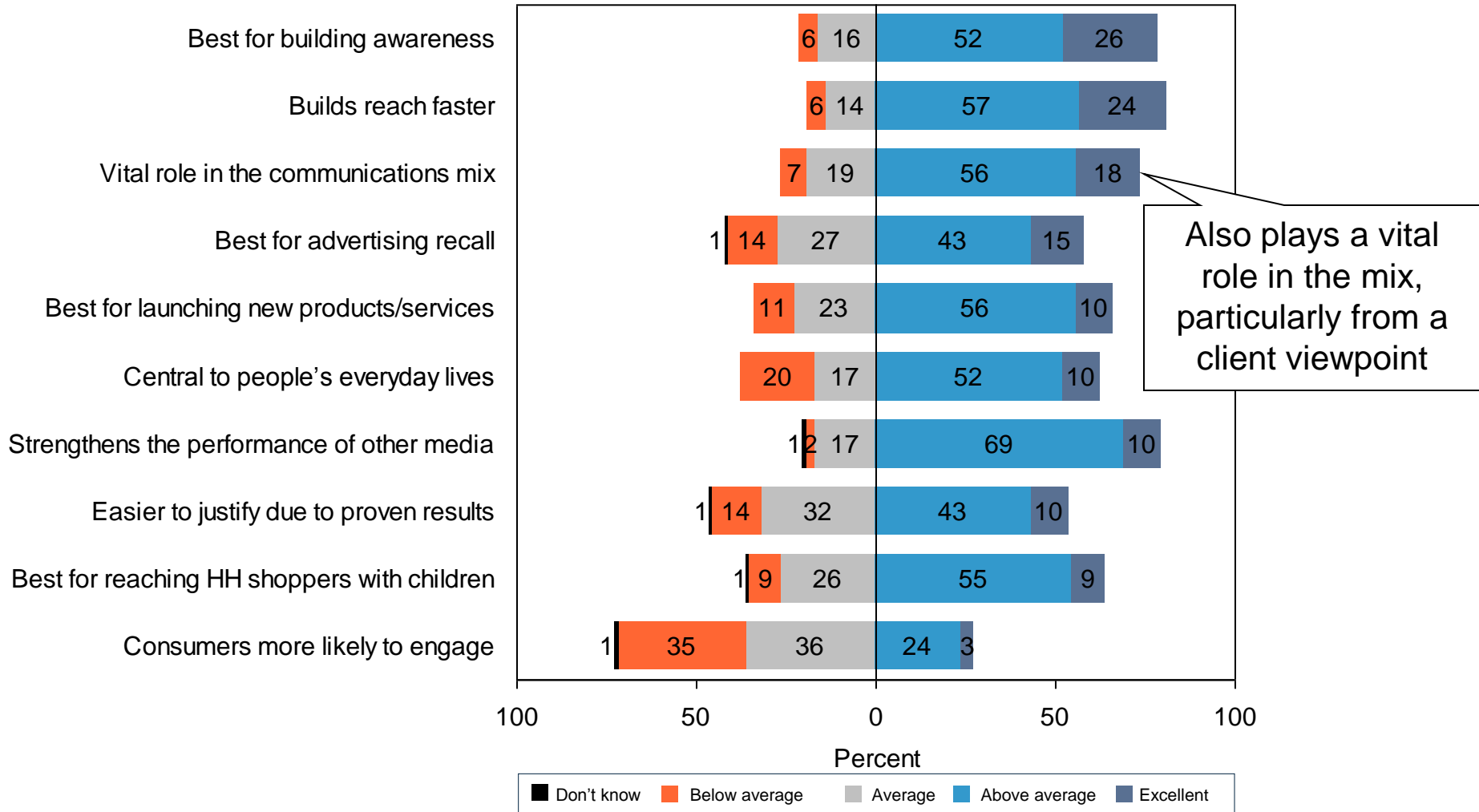


Free To Air TV Perceptions



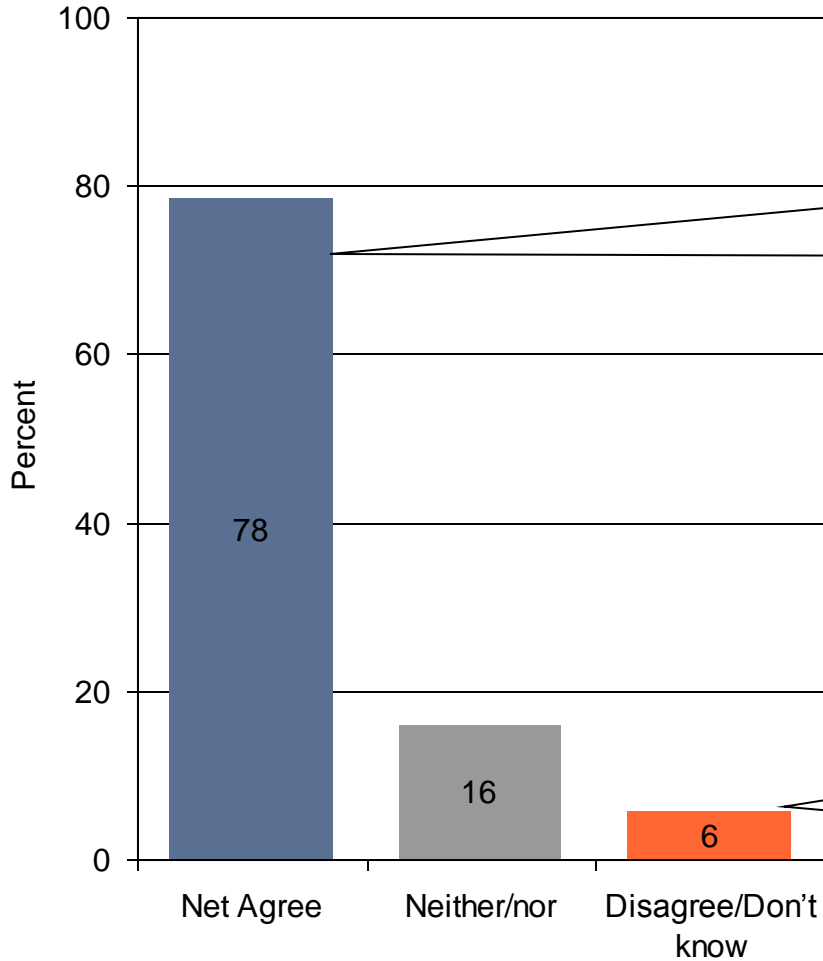
Free To Air TV Best For Awareness & Reach

Perception of Free to Air TV's Offerings



Free To Air TV The Best For Building Awareness

Agree/Disagree – FTA TV best for building awareness



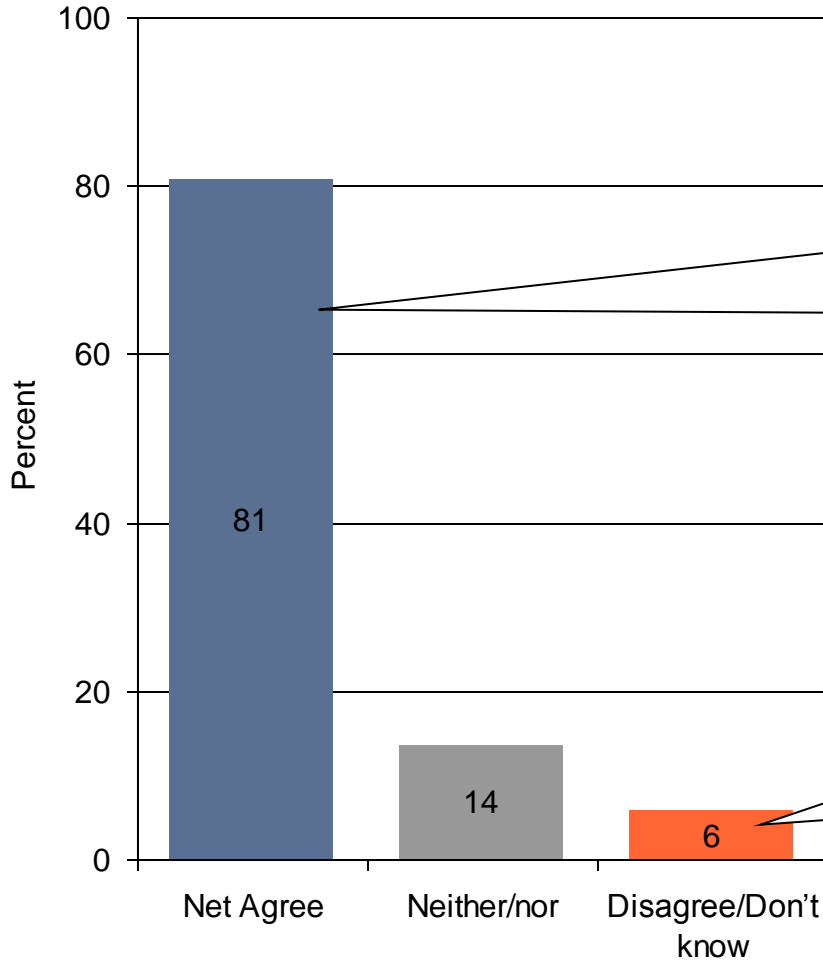
“Great for consistent brand awareness.” Media Director

“Quick to drive awareness and reach.” Marketing Director

“Time-shifted viewing could be detrimental to advertising awareness.” Media Director

Free To Air TV Builds Reach Faster

Agree/Disagree - FTA TV builds reach faster



“Broad reach and its ability to deliver this quickly is its strength.”
Media Director

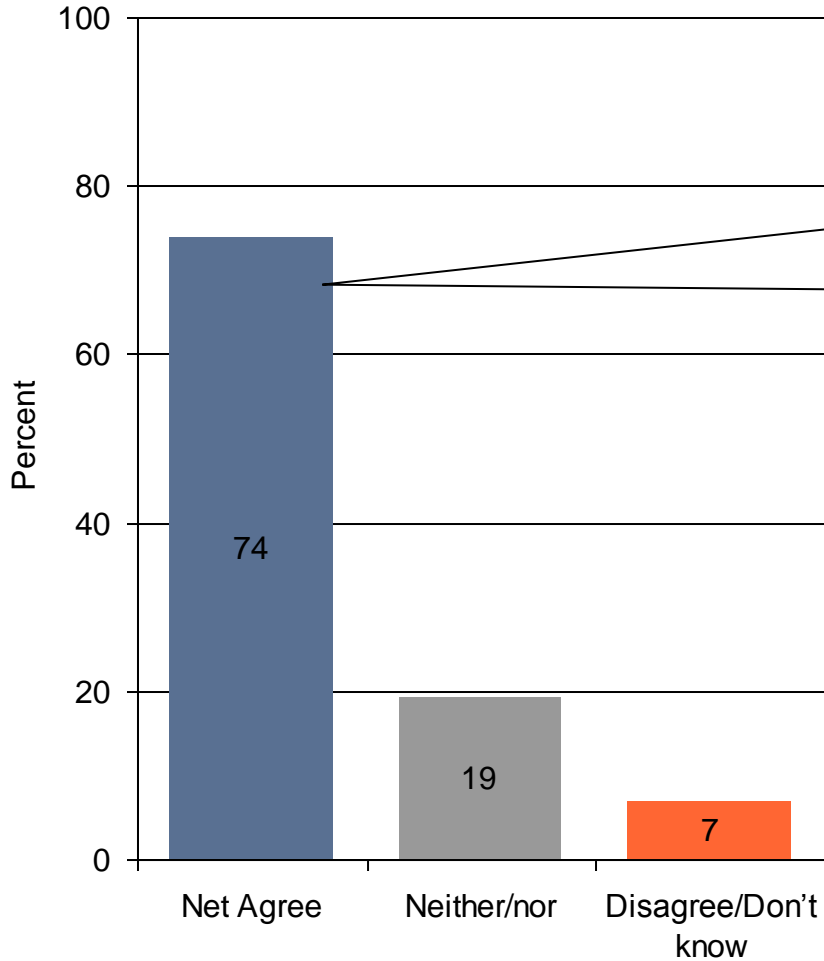
“High impact, gaining massive reach quickly.” Media Buyer

“Too mass, difficult to target some specific demo groups.”
Brand Manager

“Little reach for Gen Y.”
Marketing Director

Free To Air Plays a Vital Role In The Mix

Agree/Disagree - FTA TV vital role in the communications mix

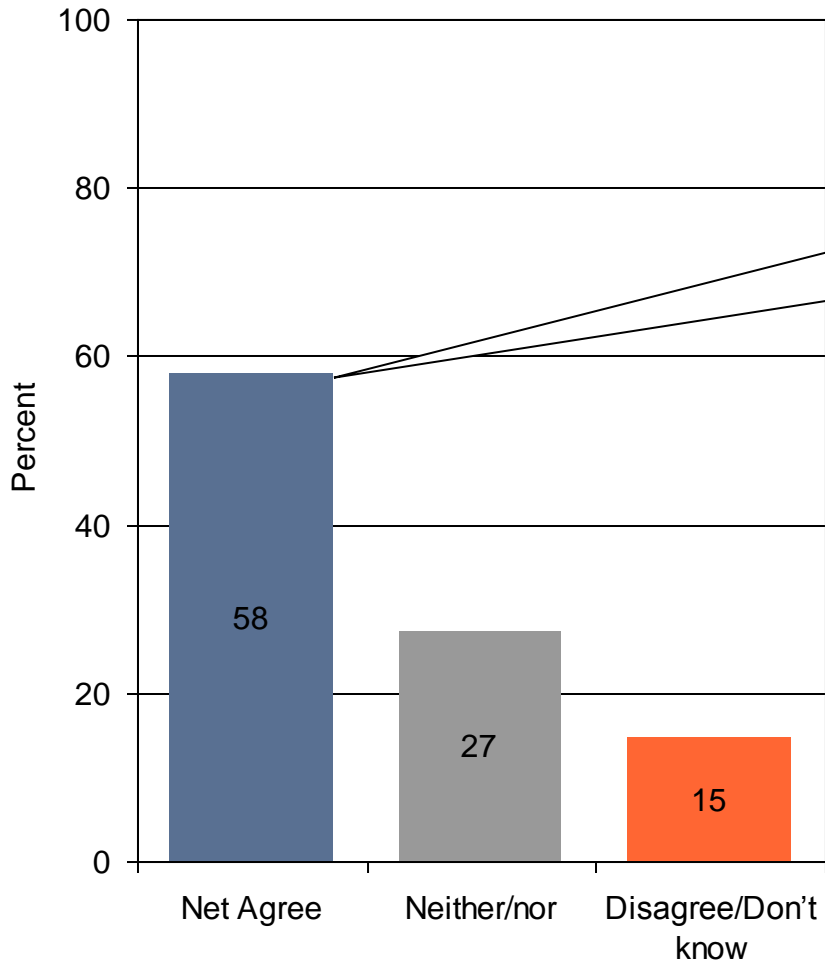


“Creates size to a campaign and important to the marketing mix”
GM Marketing

“Good for conveying brand messages and values” MD Agency

Free To Air: Best For Ad Recall

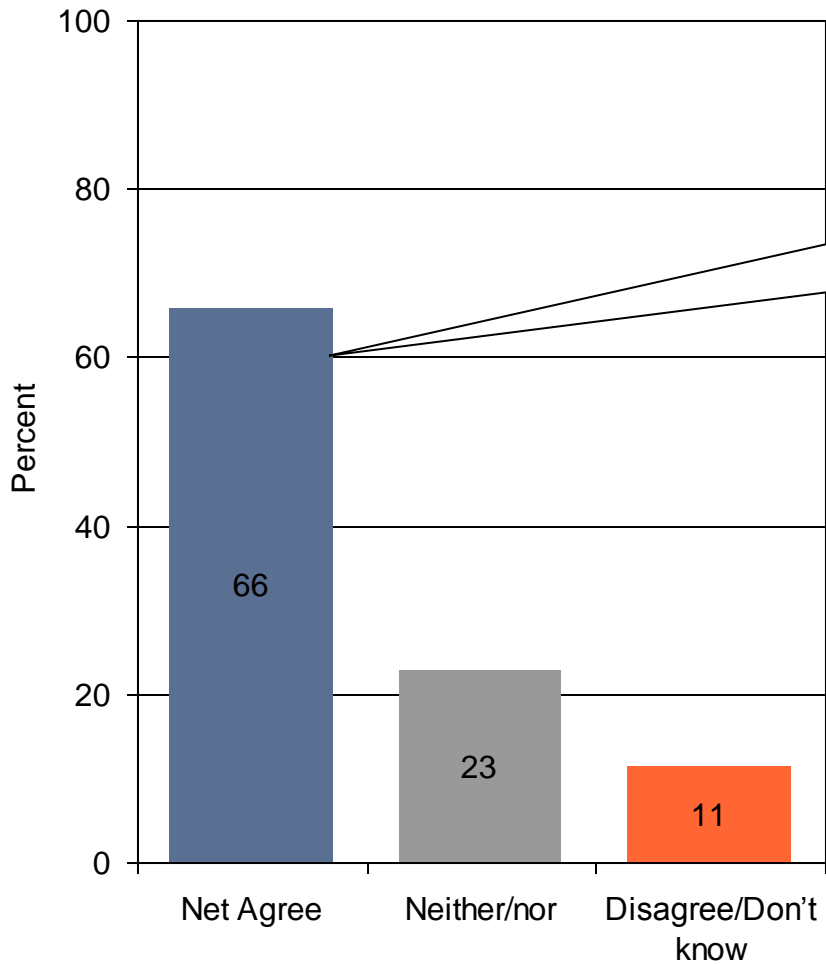
Agree/Disagree - FTA TV best for advertising recall



“Broad reach, strong brand recall, broad creative treatments are permissible.” Marketing Manager

Free To Air: The Brand Builder

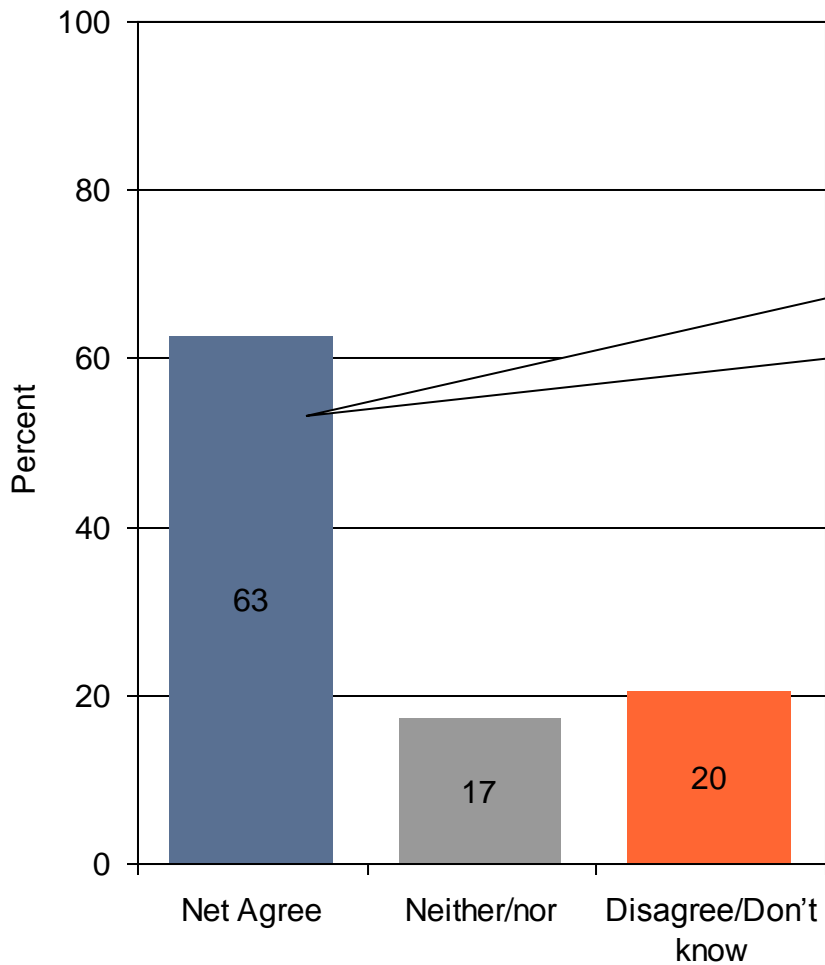
Agree/Disagree - FTA TV best for launching new products/services



“High reach and impact, excellent brand building” Media Director

Free To Air: Key Consumer Role

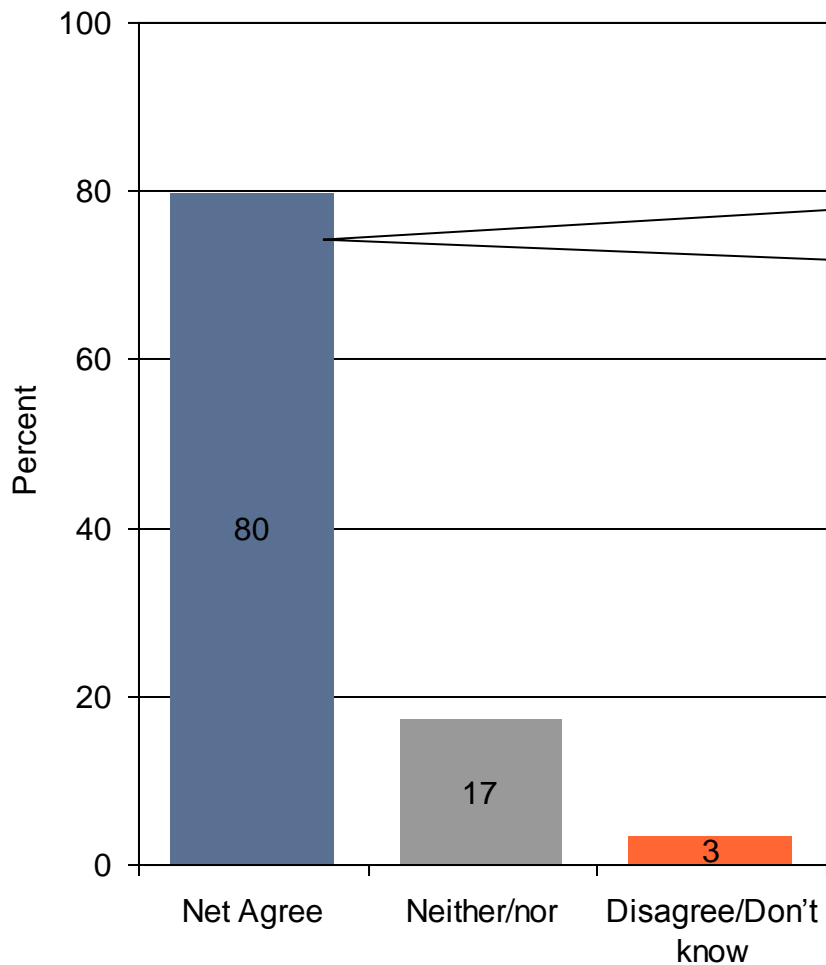
Agree/Disagree - FTA TV central to people's everyday lives



“FTA has the shows that people want to watch - this means it delivers massive audiences for advertisers.” MD Agency

Free To Air: A Multiplier Effect

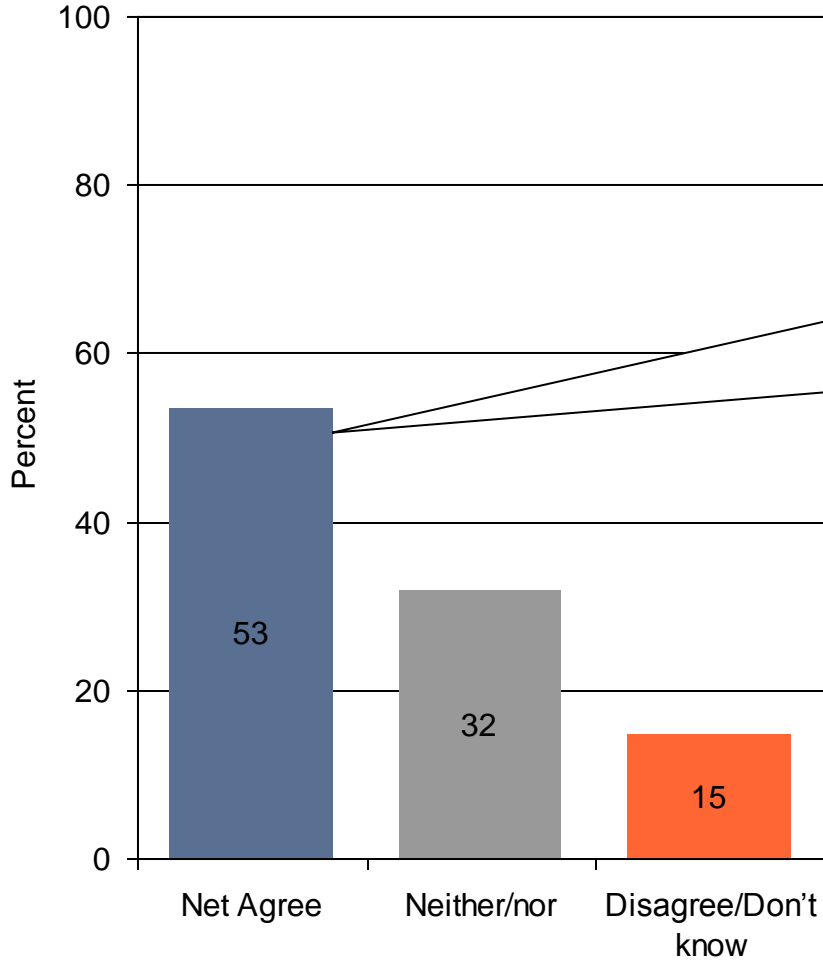
Agree/disagree - FTA TV strengthens the performance of other media



“Clearly reach is the primary strength and the ability to support other elements of your campaign.”
Marketing Director

Free To Air: Delivers Proven Results

Agree/disagree - FTA TV easier to justify due to proven results

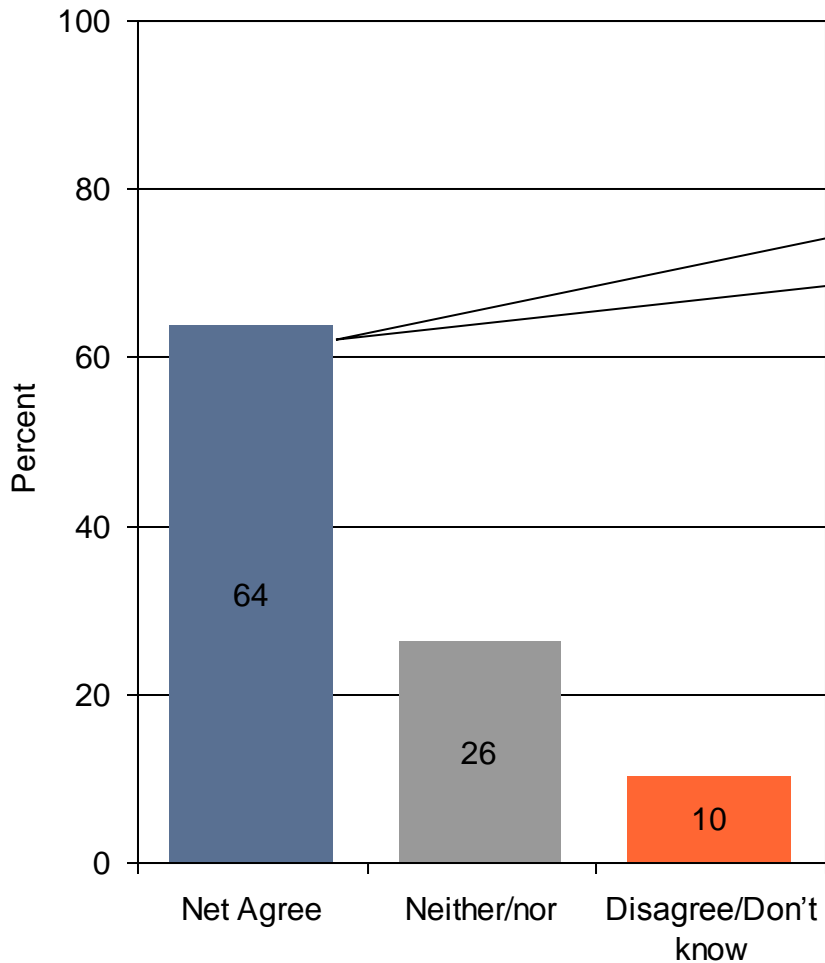


“High impact, massive reach quickly, cost efficient, proven effectiveness.” Trading Director

“Professional i.e. well managed, measured, delivers what is promised.” Marketing Manager

Free To Air: Reaching Household Shoppers

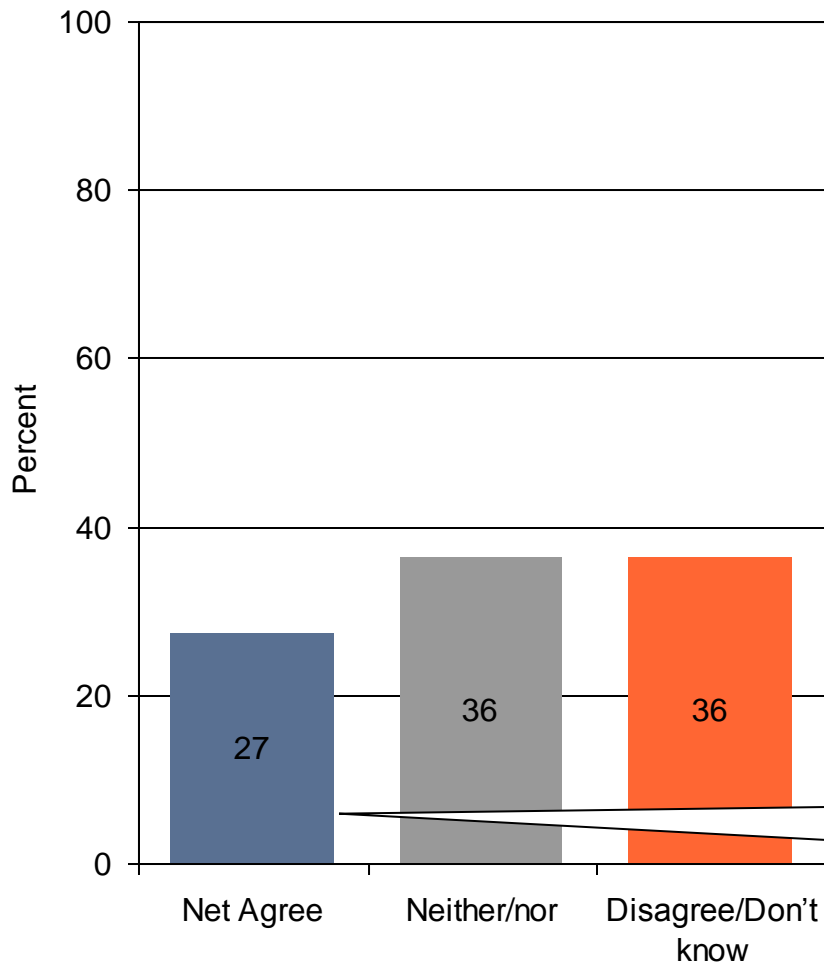
Agree/disagree - FTA TV best for reaching HH shoppers with children



“Huge penetration of audience reach and frequency - excellent for reaching children under 12.”
Strategist - Agency

Free To Air: Although Not Necessarily Engaging

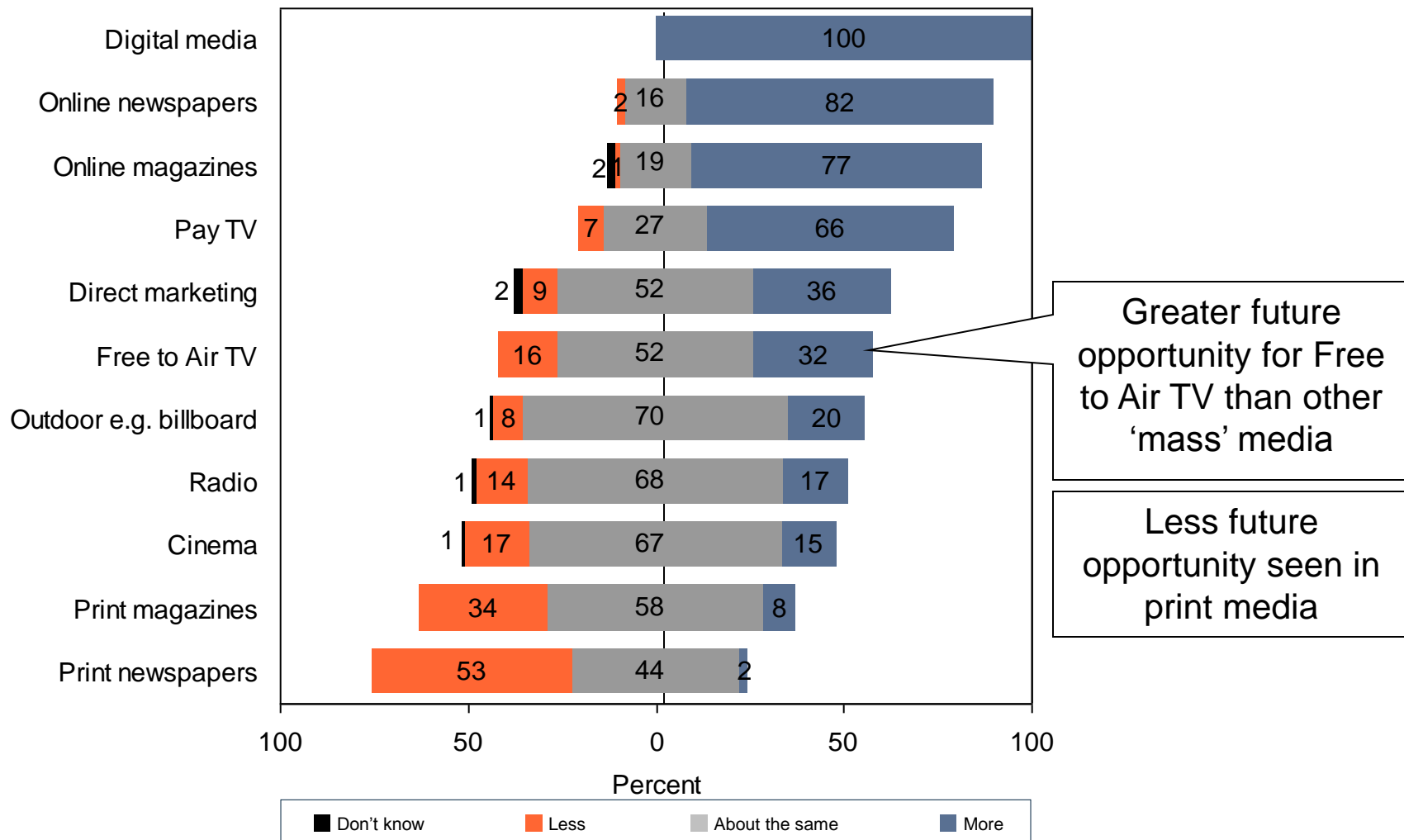
Agree/disagree - Consumers more likely to engage with FTA TV



“Mass engagement - with the right creative.” Media Director

Digital Seen To Offer The Most Future Opportunity

Perceived Opportunities to Engage with Media in Next 5 years



Greater future opportunity for Free to Air TV than other 'mass' media

Less future opportunity seen in print media

Think TV Response



Think TV are developing responses to the issues raised in this...

1. Address measurement perceptions for Free To Air TV
 - Provide stronger clarity around the strength of measurement tools, particularly for clients
 - Provide evidence around the ability to target younger demographics
2. Work on case studies to provide firmer ROI evidence for Free to Air TV