



Sub Market Data Changes in VOZ - 29 Dec 24

Agency Info Pack

Contents

- ▶ Background
- ▶ Review
- ▶ Outcome
- ▶ Delivery Schedule Transition
- ▶ Demographics
- ▶ Methodology
- ▶ Methodology Examples
- ▶ Further Information

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 are **no changes** for Aggregate Market or Regional WA outputs!

Implemented 29th December 2024, when VOZ became Currency



Sub Market Quarter Hour data continues 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.



Sub Market Elemental (minute by minute) data is **no longer be available**.

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



VOZ Sub Market **Quarter Hour Trading Demographics** have also changed:

- ✗ 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 has resulted 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 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

- ▶ 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).*

For the complete list of VOZ demographics, please check VirtualOz.com.au

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	People 55+
Men 16-39	Men 55+
Women 16-39	Women 55+

Sub Market Data Changes

METHODOLOGY

Regional TAM has implemented a **refined methodological approach** for producing Sub Market data since VOZ became currency on **December 29, 2024**.

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

The underlying Regional TAM panel **continues to be representative of the population**, with minimum sample sizes 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	Market	Universe Estimate	Factored %		Average Audience
Queensland	2,004,000	100%		50,000	Victoria	1,277,400	100%		50,000
Maryborough	714,300	35.6%	▶	17,800	Ballarat	380,600	29.8%	▶	14,900
Toowoomba	330,900	16.5%	▶	8,250	Gippsland	255,200	20.0%	▶	10,000
Cairns	274,200	13.7%	▶	6,850	Bendigo	253,200	19.8%	▶	9,900
Townsville	247,400	12.3%	▶	6,150	Albury Wodonga	206,000	16.1%	▶	8,050
Rockhampton	240,500	12.0%	▶	6,000	Shepparton	182,400	14.3%	▶	7,150
Mackay	196,700	9.8%	▶	4,900	Tasmania	562,500	100%		50,000
Northern NSW	2,355,300	100%		50,000	Hobart	293,800	52.2%	▶	26,100
Northern Rivers	1,108,600	47.1%	▶	23,550	Launceston	268,700	47.8%	▶	23,900
Newcastle	877,900	37.3%	▶	18,650	Regional WA	568,700	100%		50,000
Tamworth Taree	368,800	15.7%	▶	7,850	No Sub Markets = No Factoring required.				
Southern NSW	1,609,600	100%		50,000					
Canberra	611,800	38.0%	▶	19,000					
Wollongong	560,900	34.8%	▶	17,400					
ODW	436,900	27.1%	▶	13,550					

*Total People Universe Estimates based on 2025 TAM

VOZ Demographic Universe Estimates Proportion %

NORTHERN NSW 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 is calculated by factoring, or multiplying, the NNSW Audience result by 47%.
- ▶ The UE Proportion % also **varies 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	1,108,600	47.1%	534,900	48.0%
Newcastle	877,900	37.3%	426,200	38.2%
Tamworth Taree	368,800	15.7%	154,300	13.8%
NNSW Aggregate	2,355,300	100%	1,115,400	100%

Universe Estimates as of Jan 1 2025

Source: Regional TAM | 2025 | Universe Estimates | Northern NSW, Northern Rivers, Newcastle, Tamworth Taree | Total People, People 16-54 |

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VOZ Qtr Hr Factored Data | Audience Calculation

NORTHERN NSW 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 is different and not comparable to prior year currency data for Sub Markets.

Northern NSW Total People
Average Audience = 50,000

Northern Rivers Total People
% of Universe Estimate = 47.1%

Northern Rivers Total People
Qtr Hr Factored Average Audience

$$50,000 \times 47.1\% = 23,600$$

NNSW Aggregate Audience is an example only.

Source: Regional TAM | 2025 | Universe Estimates | Northern NSW, Northern Rivers | Total People |

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VOZ Qtr Hr Factored Data | Shares & TARPs

NORTHERN NSW EXAMPLE

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