The GTVG's spotlight on the latest TV research & publications

Focus on...

July 2022

Welcome to the first edition of *FOCUS ON.*

The Global TV Group, the grouping of TV companies' and sales houses' trade bodies in Europe, the USA, Canada, Australia and Latin America, has compiled this slide deck to showcase the most current research about TV and video.

This compilation puts the spotlight on four studies which merit international attention: The Video Advertising Bureau's *An Insider's Look: Why Brands and Agencies are Shifting to Audience-Based TV Buying* (US), VIA's *Rethinking Reach in the digital Age* (Belgium), SNPTV's *#ROITV3* study (France), and Screenforce's *Track the Success* (DACH region).

The collection, freely available to anyone in the advertising industry, gathers the key learnings from the studies in question and the most pertinent graphs, together with a link to the complete research on the associations' websites.

We hope you find plenty of value and inspiration in the collected research and invite you to spread the *FOCUS ON* widely.

The Global TV Group

TV's impact remains strong in the digital age

Executive summary/key results

Linear TV is declining, but it still brings significant reach

The efficiency of TV has grown and the impact remains stable

Measures against ad avoidance have the potential to raise the daily reach of TV by 6.9% and weekly reach by 4%

Even a limited use of BVOD next to TV results in an immediate extra reach of 2% to 4%

Adding local short form video further increases reach to historic levels

The future of TV is one connected video ecosystem

Title of the study: Rethinking TV Reach in the Digital Age

Year of publication: 2021

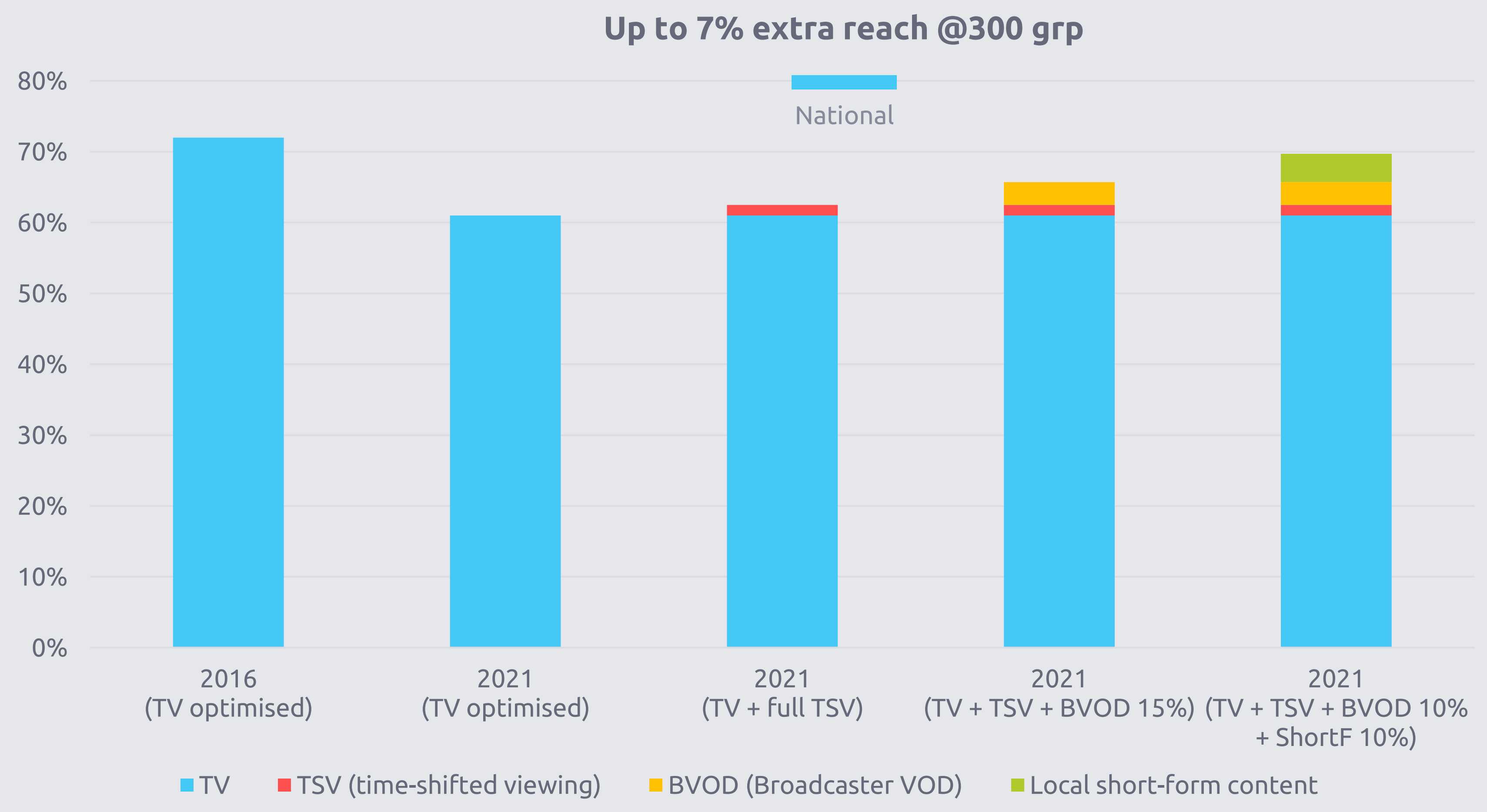
Commissioned by: VIA – The association of audiovisual companies in Belgium

Contractor: Results of various studies commissioned by the CIM (the Belgian JIC) were used in this compilation; this material was supplemented with additional data from different sources.

Full study: Download the whitepaper in English (Dutch and French versions are also available). Click here

More information

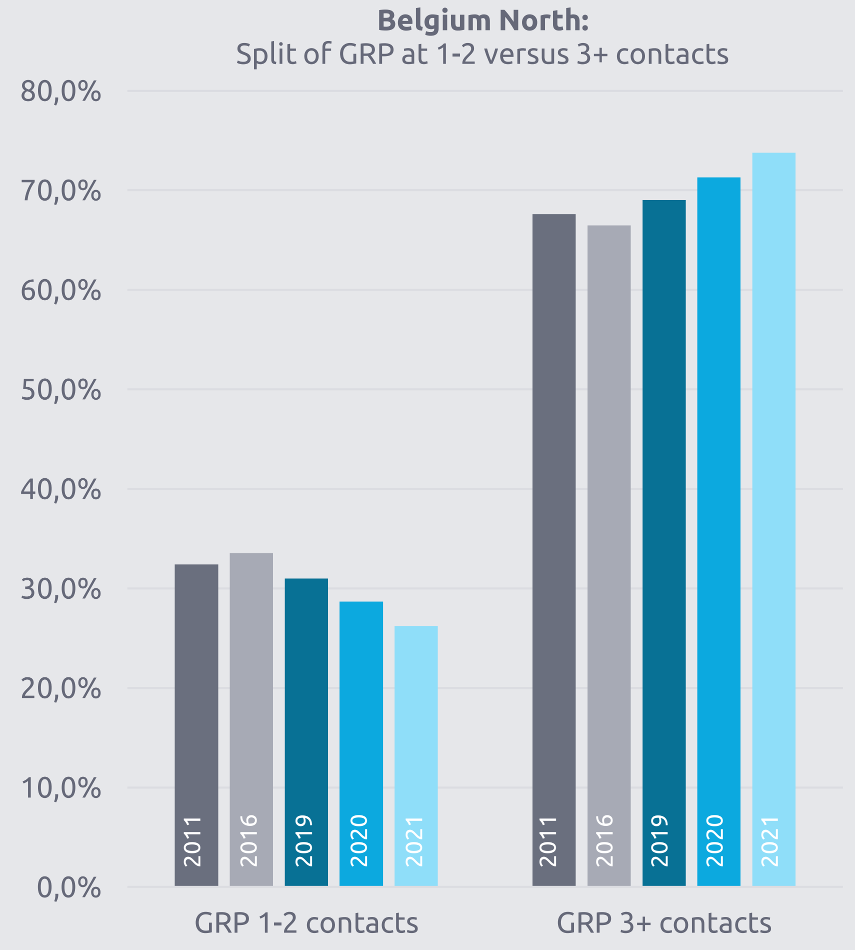
It's time to rethink TV reach in the digital age

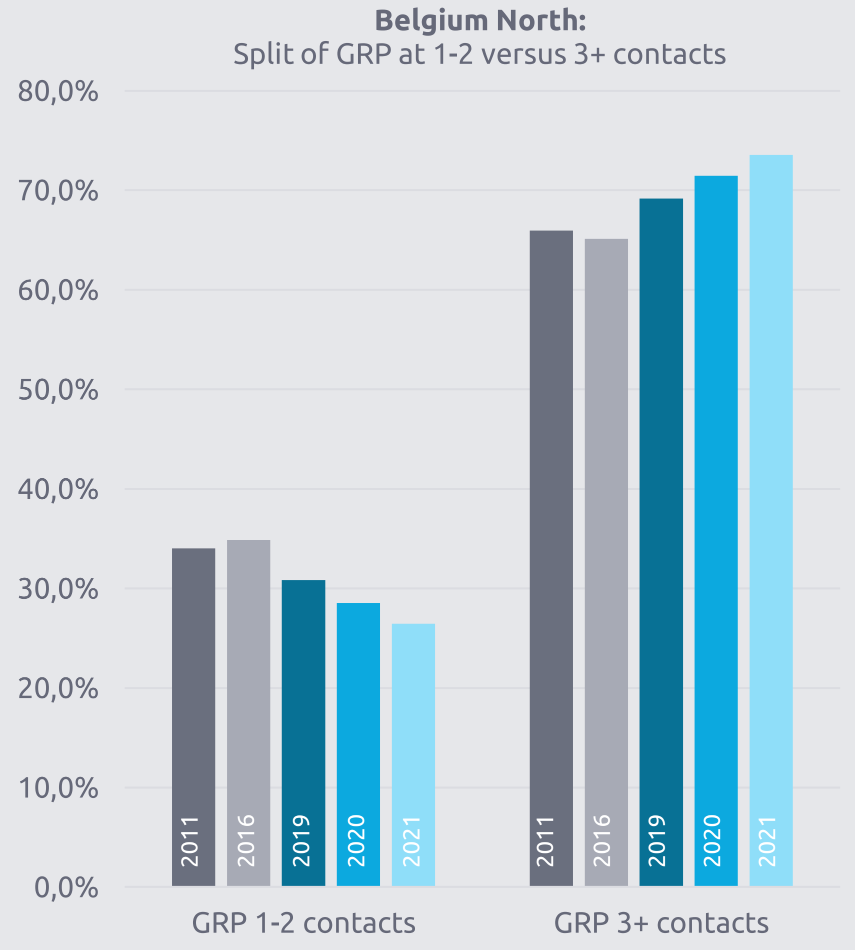


With new (unskippable) advertising models in time-shifted viewing, and when BVOD and short-form video are introduced in small quantities, the local video eco system provides equal reach compared to 5 years ago. Total video will be the new normal.

Source: CIM Audimetrie based Coverguides / estimated effect of TSV measures / BVOD+Shortform : CIM internet 28/8-29/9 – 18-54

Linear TV becomes more efficient





The declining reach of linear TV is primarily caused by the absence of occasional viewers, while the core target is still there. Of all GRPs, less will therefore be deployed inefficiently. In the technical jargon, this is referred to as the 'effective GRP' at a certain effective frequency threshold.

Source: CIM Audimetrie, all channels, SPOT type only. Guests included starting 2013.

Identifying the most appropriate media strategies for a robust recovery

Executive summary/key results

In 2020, TV remained dominant across all KPIs:

- ROI/sales
- Contribution/invest-ment share (despite the challenging business environment)

The impact of TV is immediate and unparalleled in its duration.
TV is the medium with the highest long-term multiplier of 2.25

Due to its extensive reach, TV consistently generates strong synergies with other media

The recent health crisis proved the negative effect of cutting back/cancelling TV campaigns for brands.
Advertisers who maintained their ad budgets achieved positive results

Title of the study: #ROITV3: TV, the cornerstone of an effective media strategy

Year of publication: 2021

Commissioned by: SNPTV

Contractor: Ekimetrics

Full study: Click here

More information

TV is the highest contributor to sales among all media, making it the medium of choice in terms of performance

Contribution to sales

40%

of sales initiated by TV among all media

ROI

5.6

For each € spent

Synergy

+15%

Average effectiveness vs. other media sales

Higher saturation

+

Threshold

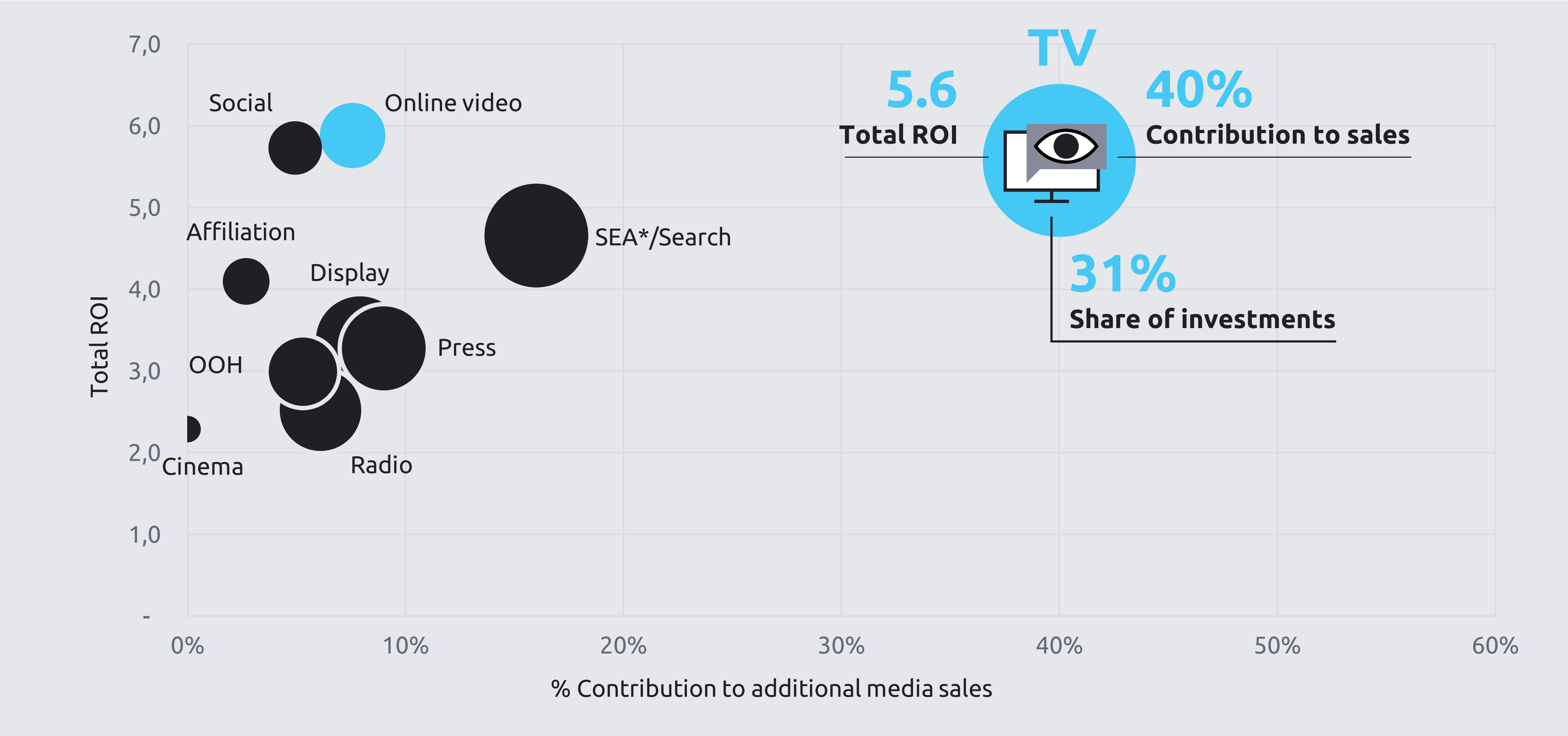
ROI in France

+20%

vs. G4 (UK, Spain, Italy and Germany)

Source: SNPTV/Ekimetrics, #ROITV3: TV, the cornerstone of an effective media strategy, November 2021

TV retained high contribution to sales throughout the crisis



Overall scope - #ROI3 (2015/2020).

Bubble size proportional to spending.

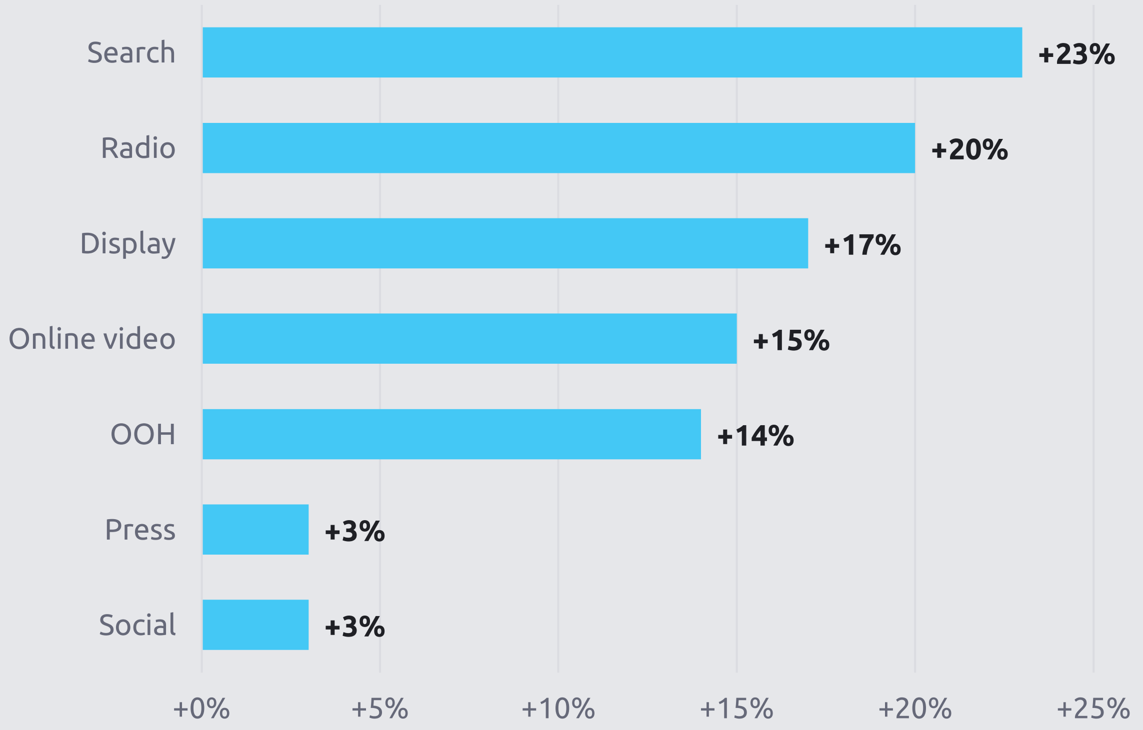
*SEA: Search Engine Advertisisng.

Source: SNPTV/Ekimetrics, #ROITV3: TV, the cornerstone of an effective media strategy, November 2021.

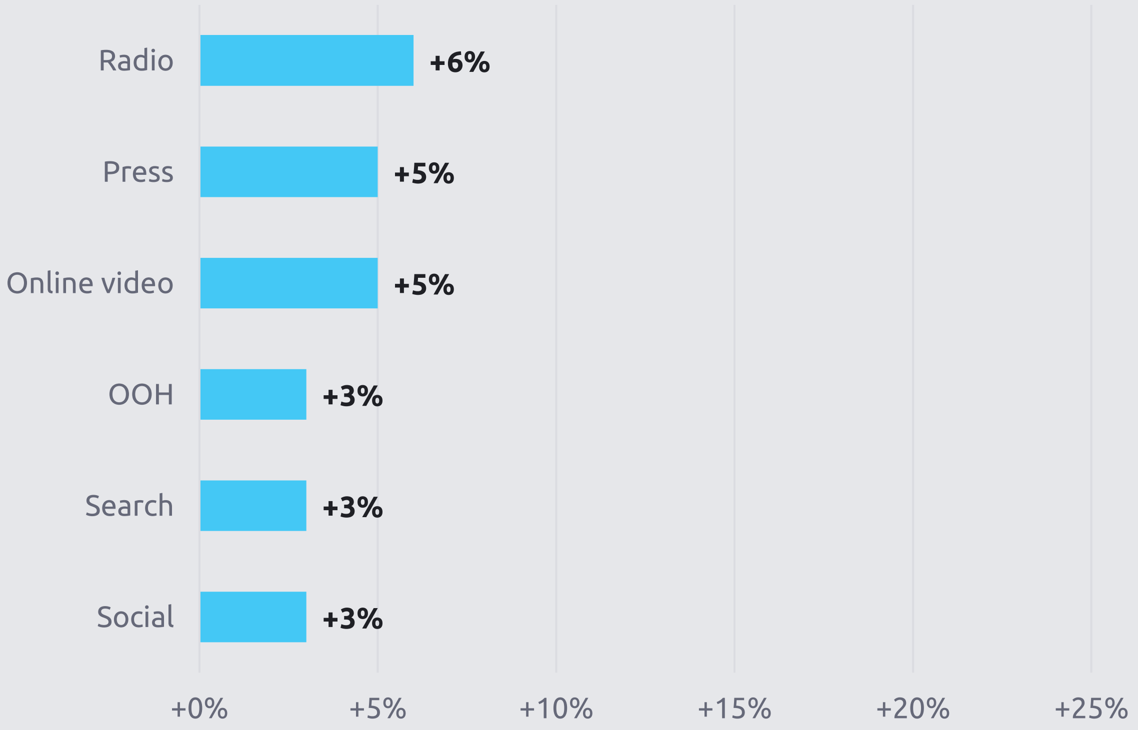
TV acts as a catalyst for all other media

Scope: France – all sectors 2015/2020

Effectiveness gains **ON OTHER MEDIA** when TV is used



Effectiveness gains **ON TV** when other media are used



Source: SNPTV/Ekimetrics, #ROITV3: TV, the cornerstone of an effective media strategy, November 2021

Track the Success: Quantifying the quality of TV and video advertising

Executive summary/key results

TV content has the highest advertising impact, YouTube and Facebook are significantly behind

TV content possesses highest visibility and the most intense perception

Advertising in TV content has the strongest emotional impact

The activation level of content and advertising is very balanced on television

Usage situations are more decisive for advertising impact than device type

Title of the study:
Track the Success

Year of publication: 2021

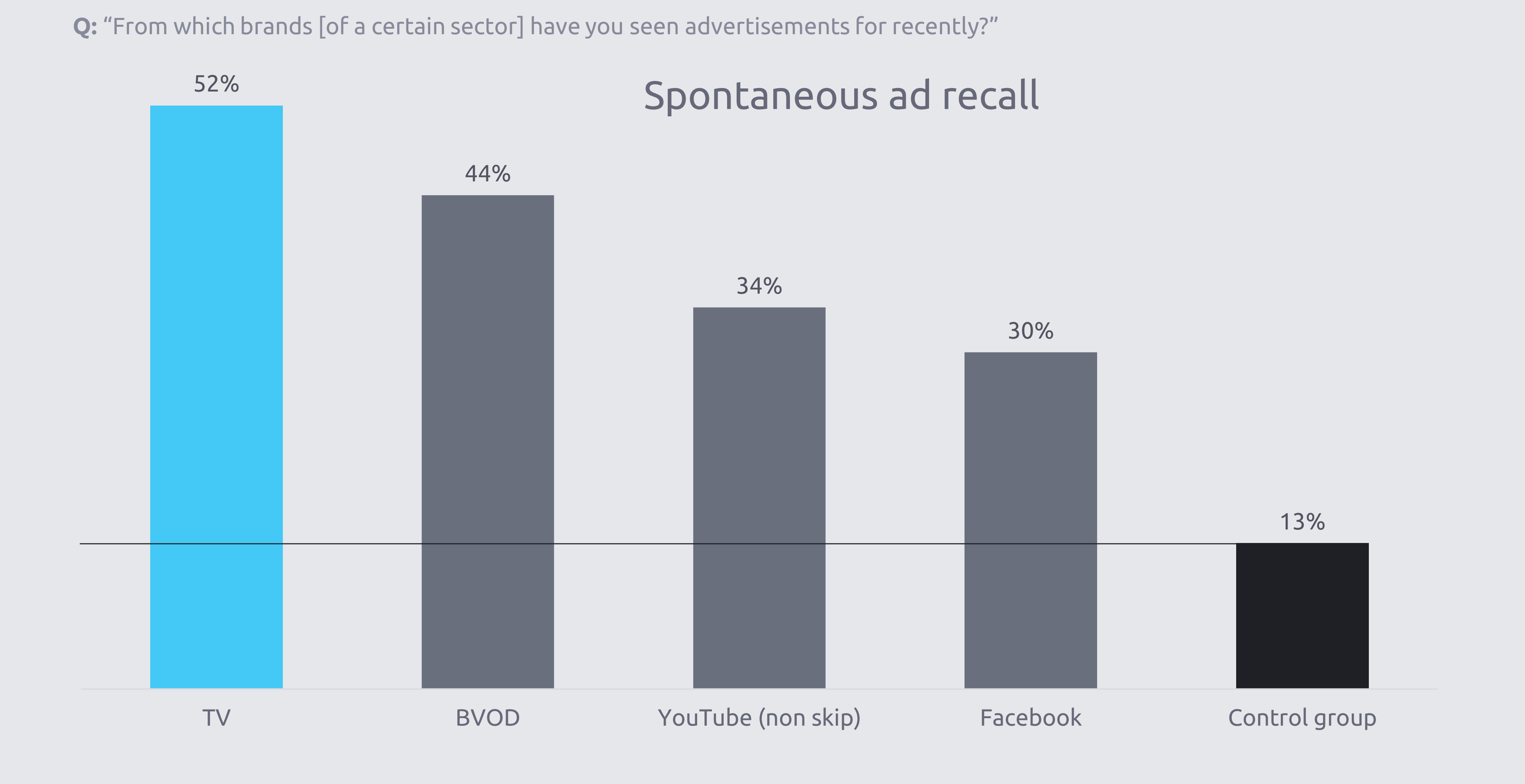
Commissioned by: Screenforce

Contractor: eye square

Full study: A summary presentation is available in English.
Click here

More information

TV ads are best remembered spontaneously



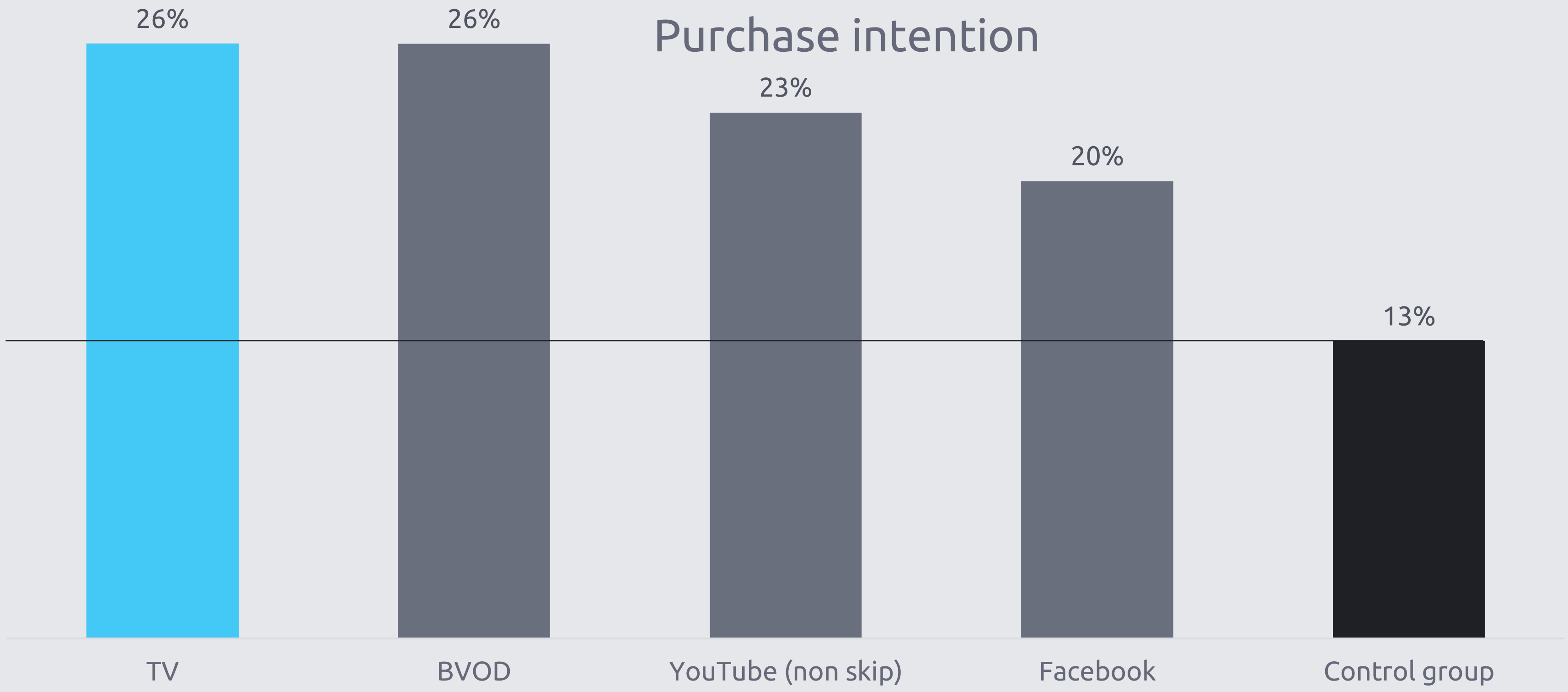
TV content has the highest advertising impact, as YouTube and Facebook are significantly behind when it comes to ad recall.

Source: Screenforce, Track the Success, 2021

Number of ad contacts: N (TV) = 448, N (BVOD; arithmetic mean of TV and Smartphone) = 1003, N (YouTube; arithmetic mean of TV and Smartphone; 100% Non-Skippable) = 1034, N (Facebook; arithmetic mean of optimized and standard spots) = 523, N (Control group) = 444.

TV & BVOD are even when it comes to purchase intentions

Q: "Suppose you wanted to buy (a product category) and all of the following products were available at the same price, which brand would you choose?"



When asked about purchase intent, the score is highest for TV and BVOD, followed by YouTube and then Facebook.

Source: Screenforce, Track the Success, 2021

Number of ad contacts: N (TV) = 424, N (BVOD; TV and Smartphone) = 971, N (YouTube; TV and Smartphone = 1027,N (Facebook, arithmetic mean of optimized and standard spots) = 515, N (Control group) = 436.

Perception, reaction and effect of ads consistently rank highest for TV and BVOD

Compared to YouTube and Facebook, TV and BVOD systematically score better in terms of ad perception, reaction to ads and ads' impact across all parameters below. The ranking system ranges from 1 to 4, with 1 representing the best overall result.

Perception → Reaction → Effect

	Settings		Perception opportunity			Reaction		Acceptance	Advertising potential			
	With sound	Full screen	Visibility duration	Full screen coverage of advertising	Attention to Screen (Eyes on Ad)	Overall emotionalization of advertising	Tension due to advertising*	Trustworthiness & acceptance **	Spontaneous ad recall	Aided ad recall	Detail remembrance	Purchase intention
TV	1	1	1	1	1	2	1	1	1	1	2	1
BVOD	1	1	2	1	2	1	2	2	2	2	1	1
YouTube (non skip)	1	2	3	2	3	3	4	3	3	3	3	4
Facebook	2	3	4	3	4	4	3	4	4	4	3	3
	System 0 (perception)					System 1 (implicit condition)			System 2 (explicit effect)			

*Tension due to advertising (the lower the better)

** Acceptance: Average of Top2-Answers to questions „[Media Platform] is trustworthy“ and „commercials are part of it“ on a 5-point scale.

Common traits among brands and agencies on the path to audience-based TV buying

Executive summary/key results

Brands and agencies are embracing data & analytics to help them make more informed decisions around their marketing strategies

Empowered by data & analytics, brands and agencies are **open to new ways of buying media and are eager to consider new solutions** that create 'smarter' advertising campaigns

By working closely with media owners, many **brands and agencies that are implementing audience-based buying are satisfied with the process** and find it easier than, or on par with, what they expected

As a result, most **marketers are shifting from traditional demo-based TV buys to audience-based buying** to some degree. This signals a ripe opportunity for audience buying to grow and become a key part of their TV buying strategy

Title of the study:
An Insider's Look: Why Brands and Agencies are Shifting to Audience-Based TV Buying

Year of publication: 2021

Commissioned by: VAB

Contractor: Advertiser Perceptions

Full study: Click here

More information

Over 85% of brands and agencies, both large and small, are shifting from traditional demographic-based TV buying to audience-based buying

'Small business' brand marketers and agency professionals are much more likely to be in the 'test-and-learn' phase currently

Q: Which of the following best describes your (company's/main client's) current approach to audience-based buying (ABB) for TV advertising?

'Any Degree of ABB Implementation'		'ABB is a key part of our TV Strategy'	'ABB is a small part of our TV strategy'	'Testing ABB and determining its role in our TV strategies'	'Not currently using ABB for TV'
94%	'Large' Brand Marketers	37%	41%	16%	6%
100%	'Small' Brand Marketers	37%	37%	26%	0%
87%	'Large Business' Agency Professionals	30%	39%	18%	13%
89%	'Small Business' Agency Professionals	26%	34%	29%	11%

Source: VAB / Advertiser Perceptions 'Audience-Based Buying Survey,' March 23 – 31, 2021. 'Large' Brand Marketers = business with annual total ad spend of $5MM+, 'Small' Brand Marketers = business with annual total ad spend of $10K - $5MM, 'Large Business' Agency Professionals = client with annual total ad spend of $5MM+, 'Small Business' Agency Professionals = client with annual total ad spend of $10K - $5MM. Survey Q70. Which of the following best describes your (company's/main client's) current approach to audience-based buying for TV advertising?