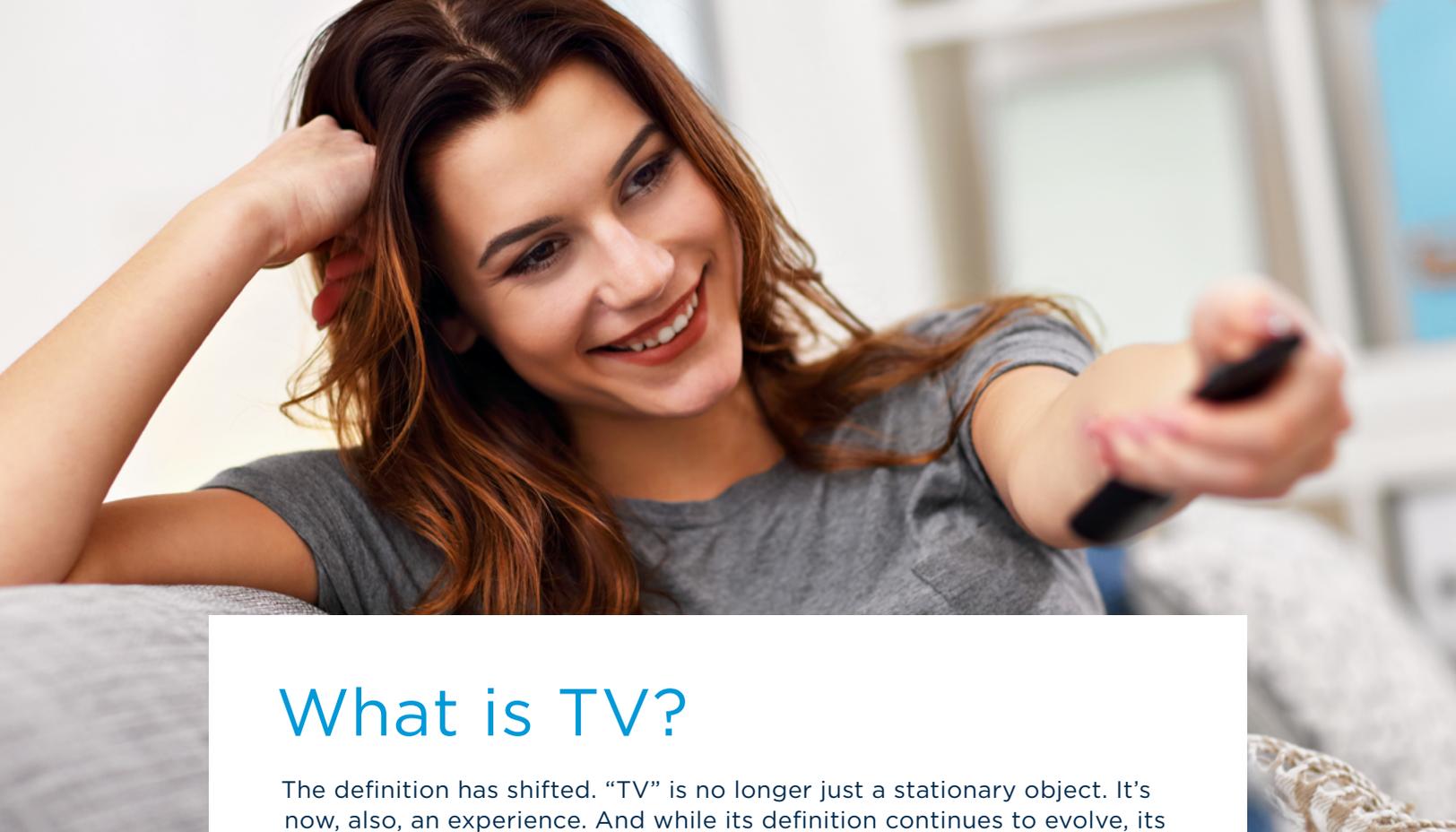


# Think TV First

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Examining TV's role in the consumer purchase journey and its efficacy in an increasingly media-fragmented environment



## What is TV?

The definition has shifted. “TV” is no longer just a stationary object. It’s now, also, an experience. And while its definition continues to evolve, its role in advertising needs to be refocused. Advertisers need a fact-based understanding of its critical role in a well-rounded marketing campaign.

Media behavior and consumer habits are constantly evolving. The facts, however, speak for themselves.

For advertisers and businesses that want results, there’s nothing more effective than a multiscreen campaign anchored in TV.

TV is a lifestyle that engages and influences us daily across every screen. It has incomparable scale and reach with the biggest share of audience attention. It remains at the core of the consumer entertainment experience. It’s the most impactful form of advertising, and better yet, it makes other forms of media advertising more effective.

**It’s time to think TV first.**



## TV is more than just a set.

The majority of people now say that TV is something they can watch anywhere, on any device. TV is an ever-present content vehicle that influences audiences across all screens.

62%

**Say it's anything I can watch anywhere, on any device**

38%

**Define TV traditionally**

*Source: MRI Cord Evolution 2018 Annual Report*

The primary source for viewing episodic content is still “the big screen.” Audiences, however, continue to interact with this content online. They follow their favorite stars, shows, and networks on social media. They continue the discussion on their favorite content with the rest of the world long after an episode has aired.

## TV is Social

Ad-supported TV accounted for 84% of the top 10 trending Twitter topics during a measured study conducted by the VAB. While 87 ad-supported entertainment TV shows trended during the measured period, every other platform only had a handful of trending content or programs: Music (7), Movies (3), YouTube (3), Netflix (2), PPV (1).

*Source: VAB, “TV is Social” Dec., 2018*



TV is not only what we watch: it's what we talk and think about. It drives popular culture. TV is still a passion and a habit. Regardless of age, TV remains an important part of Americans' daily routines.

#### Among the general population:

85% say they have favorite networks they always watch

72% say it plays an important role in their daily routine

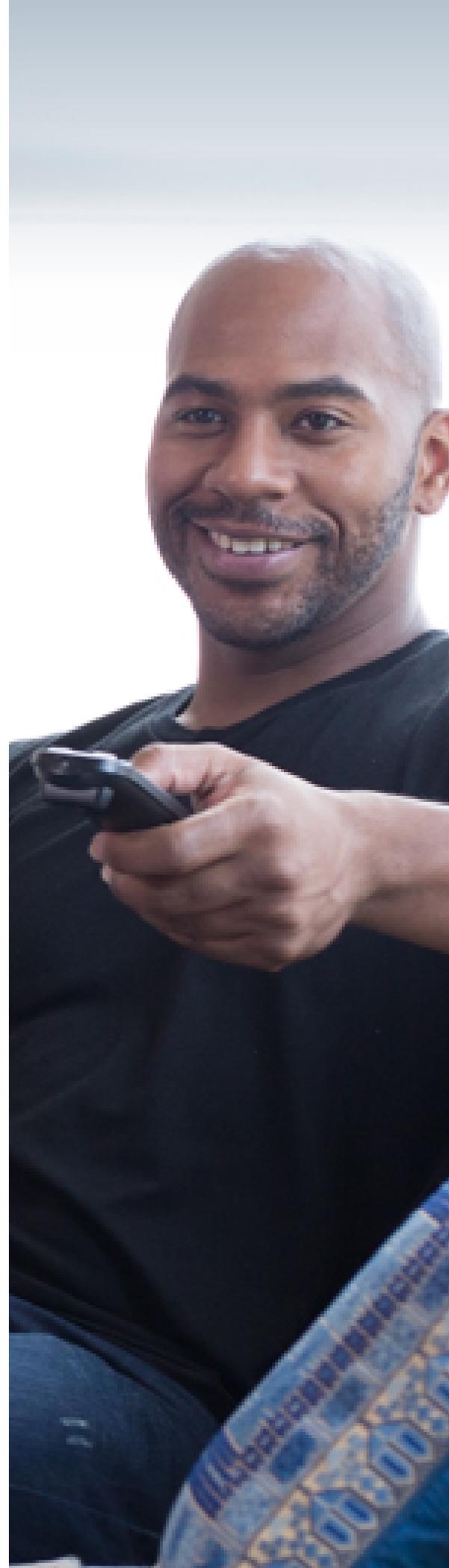
71% say it's their favorite form of entertainment

70% say they love to watch live TV

*Source: MRI 2018 Cord Evolution, Q35: How much do you agree or disagree with the following statements about television and how you typically watch TV?*

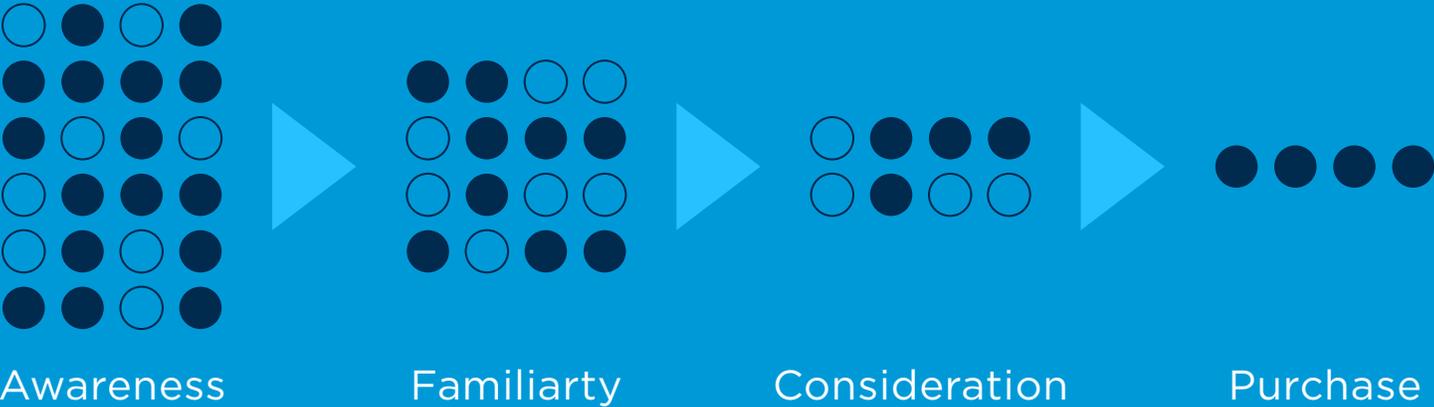
### And TV should be at the center of any marketing strategy.

From the biggest brands to local mom-and-pop shops, a TV-first strategy is the most effective for driving consumers through the purchase journey.



# Marketing's two key effects are rooted in TV.

Reaching and engaging consumers as often as possible is crucial for building brand awareness. And tightly targeting brand-aware consumers activates them, encouraging their journey to purchase.



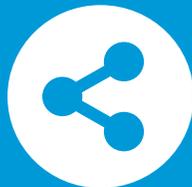


Successful campaigns introduce branding at every opportunity to build a brand-aware base before consumers have entered the purchase journey. Successful campaigns continue to reinforce messaging and build brand awareness, so that brand can ultimately leverage activations and influence brand-aware consumers to purchase. Those consumers become new customers, then repeat customers, and, finally, loyal customers by continuing to build and activate that base.



#### **Short-term action**

Make the sale/purchase



#### **Medium-term objective**

Share the utility of the product or service



#### **Long-term relationship**

Share a purpose, an overarching intent above and beyond the moment of purchase (emotion-based)

Customer loyalty is about emotion. And consistent branding builds an emotional connection with consumers so they remain in the activation phase. Emotion without benefit won't fulfill a need. Function without emotion doesn't build loyalty.

**Successful businesses create marketing strategies that answer for both.**



## Marketing has two key effects: **branding** and **activation**.

Branding builds the awareness that activation depends on. The ideal balance for the most successful marketing is a 60% allocation to branding and 40% to activation. Too much focus on branding and not enough on activation? You'll limit your sales potential. Not enough focus on branding and too much on activation? You'll stunt the growth of your customer base.

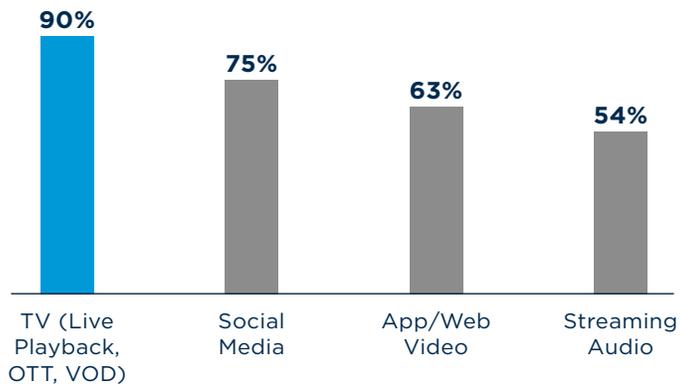
But achieving the right balance of branding and activation isn't as simple as turning a knob. It depends on choosing the right media in the right proportions. And to do that, you need to look for media that best achieves the two key performance indicators of marketing effectiveness: reach and time spent.



## The first key performance indicator for media effectiveness is reach.

TV remains the best reach vehicle available.

### % Weekly of Adult Population Reached by Platform

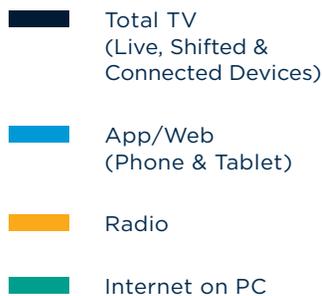


Source: Nielsen Q418 Total Audience Report

## The second most important key performance indicator is time spent.

Successful brand campaigns reach as many people as possible and extend a brand's message as often as possible. To do that effectively, that message needs to be seen where consumers spend the most time.

## People spend more time with TV than any other media.



Source: Nielsen Q418 Total Audience Report



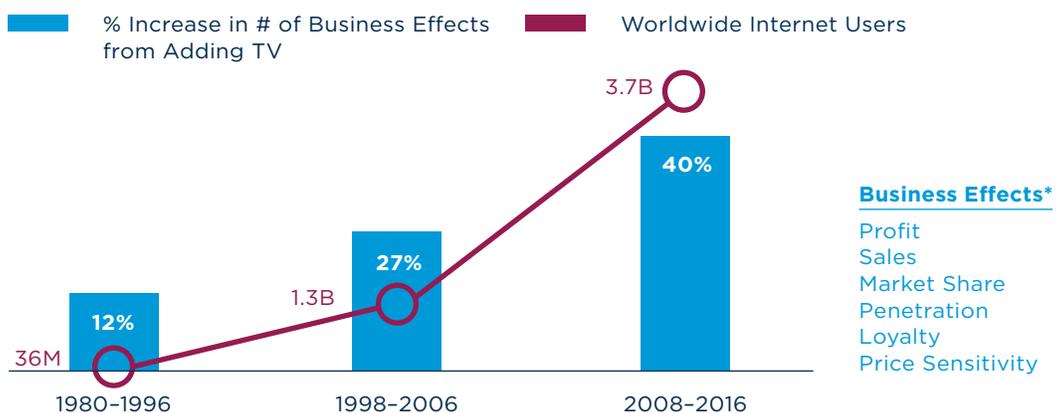


# TV advertising is more effective in the digital age.

TV is more effective now than it's ever been. With the advent of the internet and as more users have gone online, the individual impact that TV has on an ad campaign's effectiveness has increased.

Even with the proliferation of devices and content platforms, TV's importance has gone up because of the multiscreen benefits it provides.

Between 2008 and 2016, campaigns that included TV advertising saw a 40% increase in business effects compared to those that did not include TV.



Source: Media in Focus: Marketing Effectiveness in the Digital Era

## A TV-first approach lifts the effectiveness of online advertising.

When consumers see an ad on TV first and then see that message echoed online, they're more likely to engage with that ad and remember it.

**Versus seeing an ad online only, seeing it on TV results in...**

**+19%**

lift in viewer engagement with the ad

**+40%**

lift in the ad's memorability

Source: Neuro-insight (SST) UK: Difference in brain activity when watching TV content v. interacting online (web browsing, on-demand TV and search).

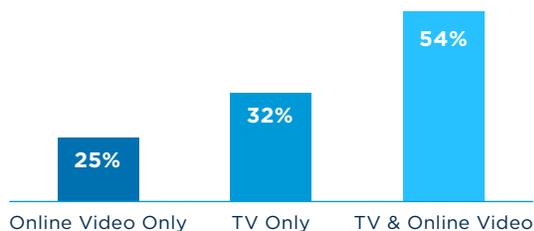
## Online video works better alongside TV.

Campaigns that have TV and online video components working together see larger business outcomes compared to campaigns that employ one or the other. TV and online advertising have a naturally synergistic relationship. The whole is better than any individual part.

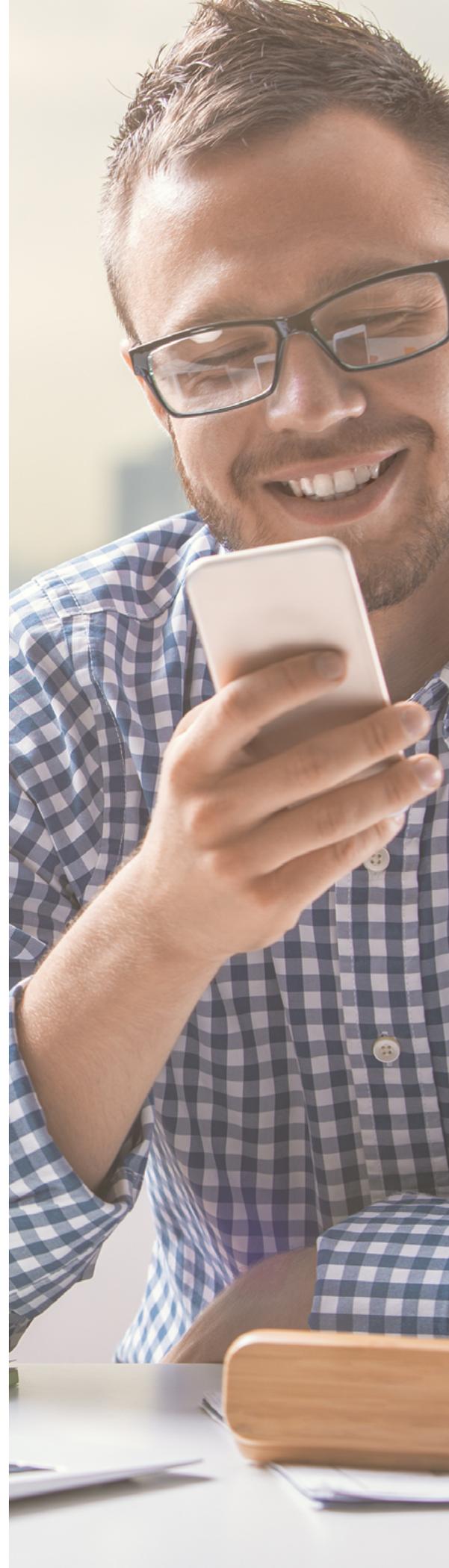
**% Increase in Average Number of Significant Business Effects**

### Business Effects\*

Profit  
Sales  
Market Share  
Penetration  
Loyalty  
Price Sensitivity



Source: Media in Focus: Marketing Effectiveness in the Digital Era



# TV is at the core of the consumer experience.

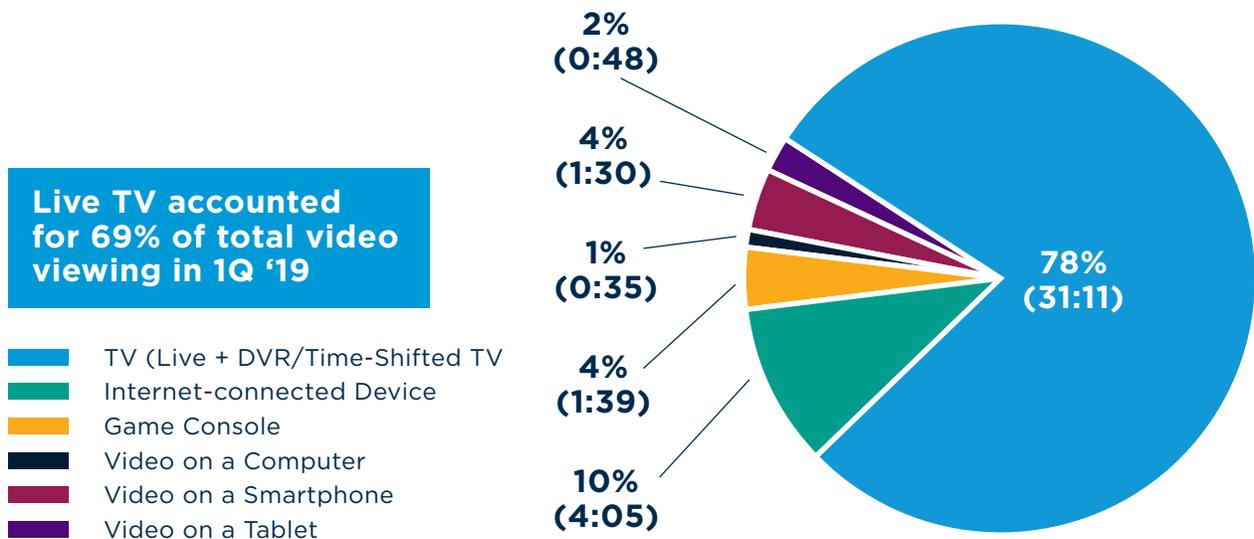
We live in a video-centric environment. Video is the most-viewed type of content. Time with video accounts for over 50% of the 11+ hours that people spend with media per day.

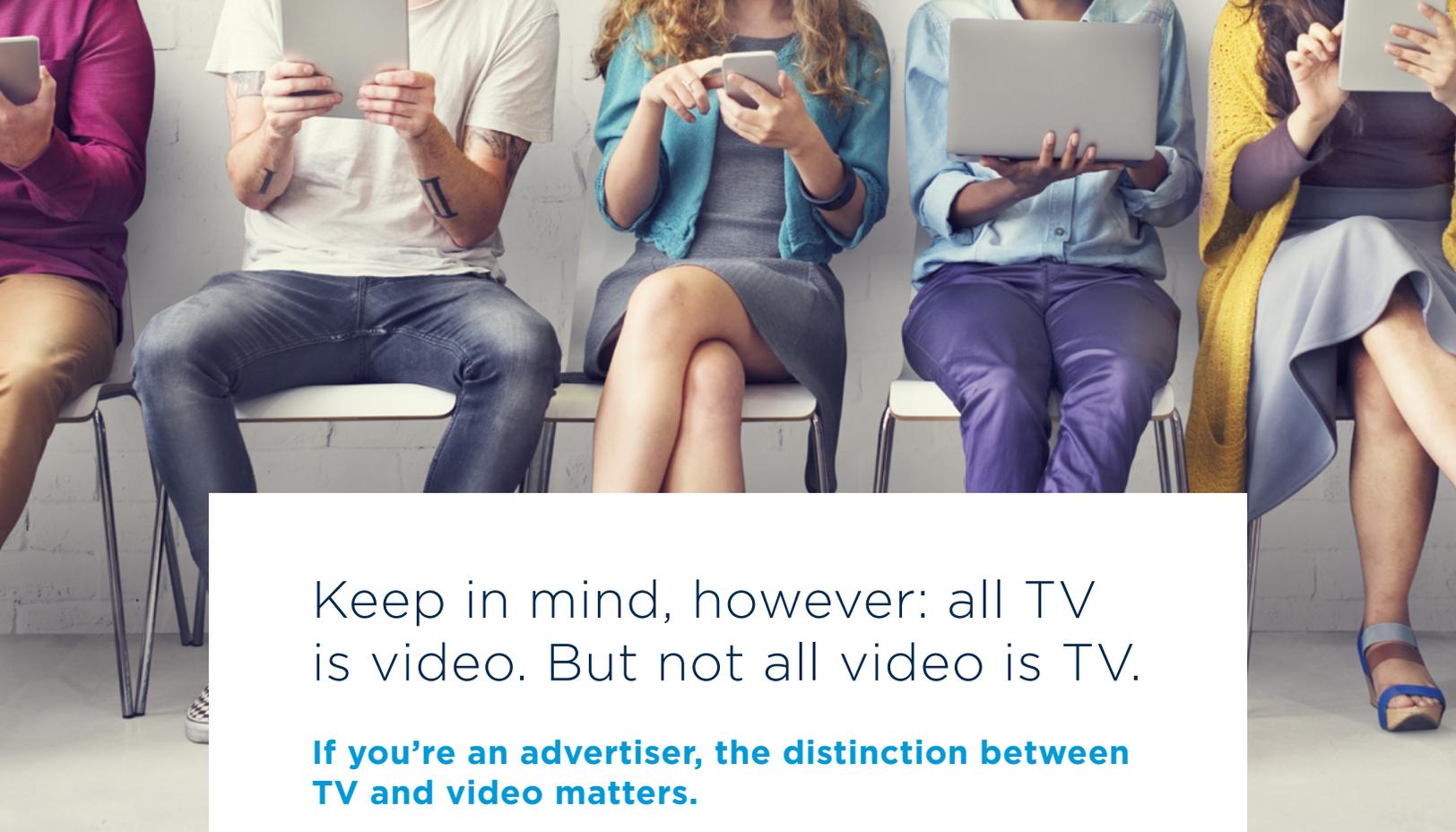
## Over two-thirds of total video viewing is spent with live TV.

In the first quarter of 2019, it also marked the first time that more millennials were engaged with a TV-connected device than radio during any given minute.

### % Share of Weekly Time Spent by Video Device — 1Q '19

(Hrs:Mins Among U.S. Adult 18+ Population)



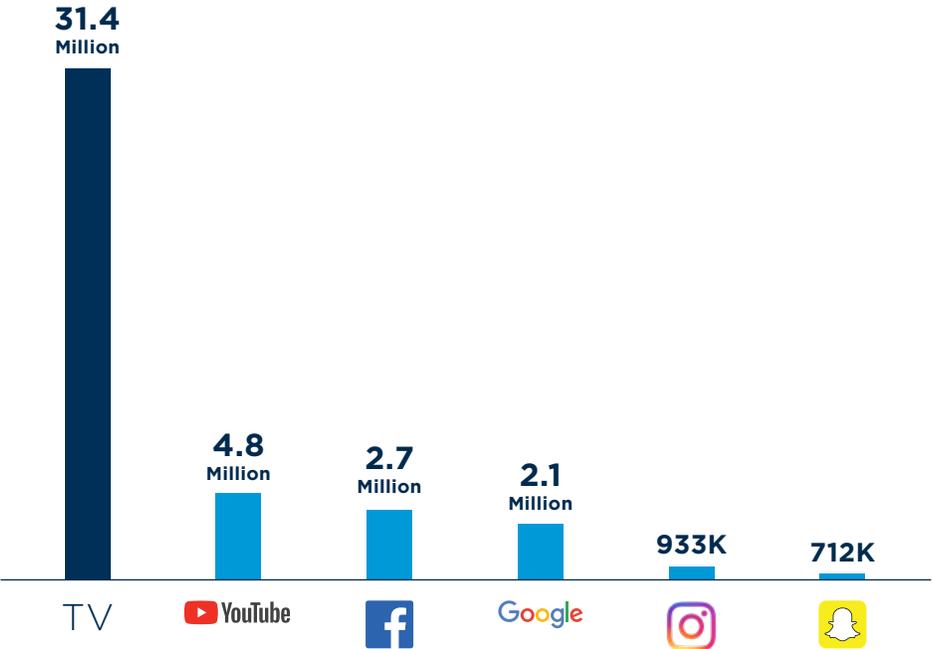


Keep in mind, however: all TV is video. But not all video is TV.

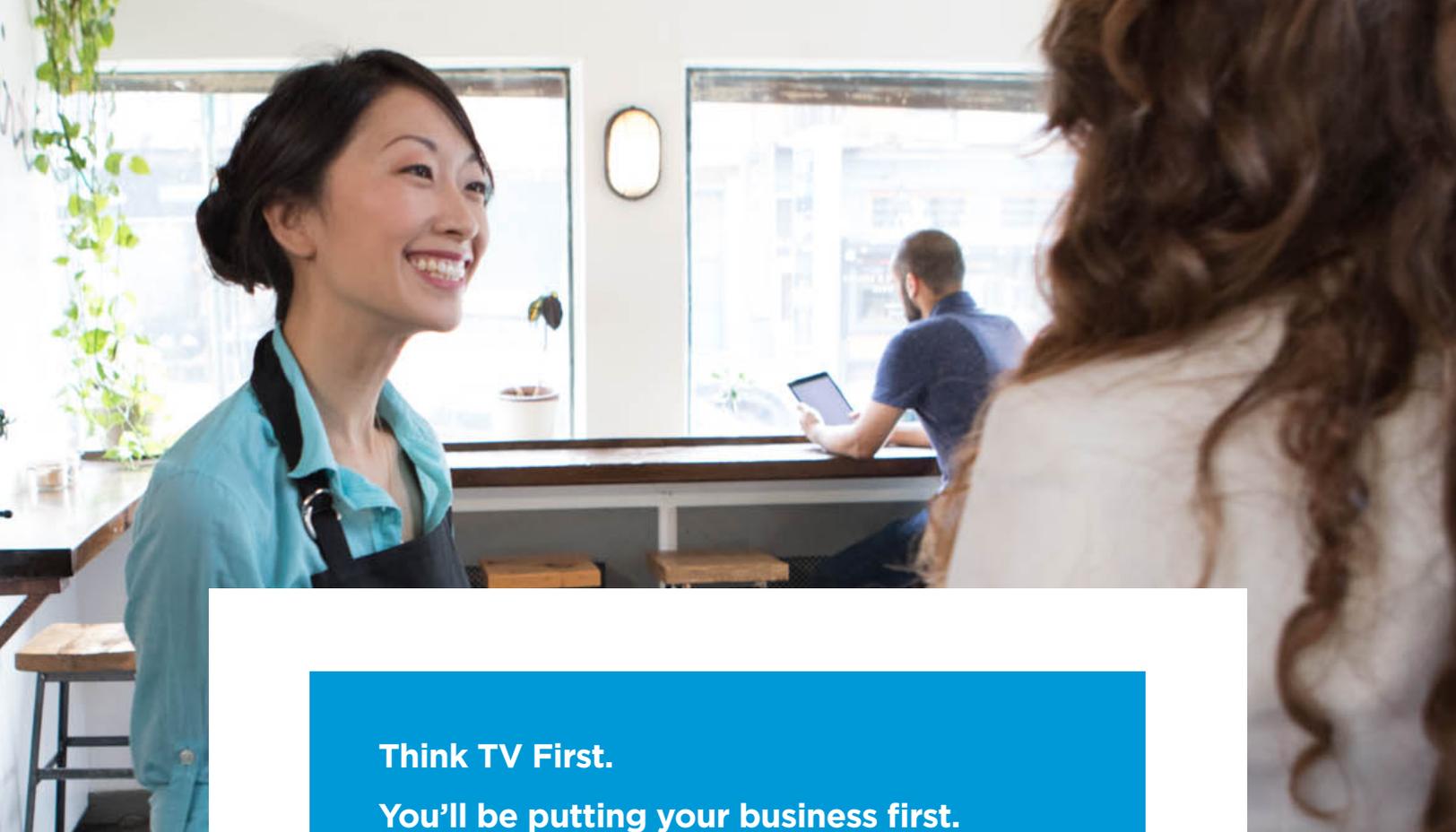
**If you're an advertiser, the distinction between TV and video matters.**

TV's reach and engagement levels are so high that the chance your message will resonate, be seen, and be remembered skyrockets. Great commercials and campaigns move businesses. They create brands that shape our economy. We dedicate hours to discussing our favorite commercials that aired during popular television events.

**Average Audience Size for Adults 18+**



Source: VAB analysis of comScore MediaMetrix Key Measures multiplatform (desktop + mobile) data, June 2019; P18+. VAB analysis of Nielsen R&F Time Period Report, Live + SD, Total Day, June 1-30, 2019; P18+. "Average Audience" is based on the average minute, which is factored across the full month for websites and TV. TV Brands include linear TV and TV-related websites. comScore MediaMetrix data includes all visitor activity except for mobile video.



**Think TV First.**

**You'll be putting your business first.**

Contact us to grow your brand on TV.  
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