

# The Killer Deck

The global proof of TV's power and popularity



# The Killer Deck initiative

In 2013, *The Global TV Group* was created with major players in the TV industry joining forces to consistently back up TV's positive narrative with solid global data as well as promote the power of TV as a digitally transformed medium.

In the madness of the digital storm, and when TV advertising's power is taken for granted more than ever, *The Global TV Group* launched the Killer deck initiative to:

- Remind advertisers, journalists, tech gurus, agencies and industry peers about the power and popularity of TV
- Gather solid facts and figures worldwide to have an accessible source of reliable information
- Prove that TV and online are more powerful together

# TV is brand-safe

Among the most serious concerns in our industry, brand safety has been a major red flag for video advertising.

While it is important to address this issue it is also important to assess once more that TV has never and will never be faced with such a controversy.







## All TV is whitelisted:

- 100% transparency
- Highest rate of viewers' trust
- Regulations
- Measurement

A great topic to illustrate TV as the safest space for advertising and highlight its strengths, effectiveness and bright future.



# The global proof of TV's power and popularity

-  **Reach**  
Unbeatable scale and reach
-  **Resilience**  
TV viewing is steady throughout a decade of innovation and different stages of life
-  **Popularity**  
TV has by far the biggest share of attention
-  **Impact**  
TV is the most trusted and impactful form of advertising
-  **Effectiveness**  
Advertisers invest in TV advertising because it pays back
-  **Complementarity**  
TV makes all other media more effective

# Reach

Unbeatable scale and reach



“TV is still really powerful for us. It is still the **most mass reaching audience** and it still works for us”

**Marisa Thalberg**, CMO of Taco Bell

*April 2017*

# Unbeatable daily, weekly and monthly reach

% of the Finnish population



71.0%



92.0%



97.0%

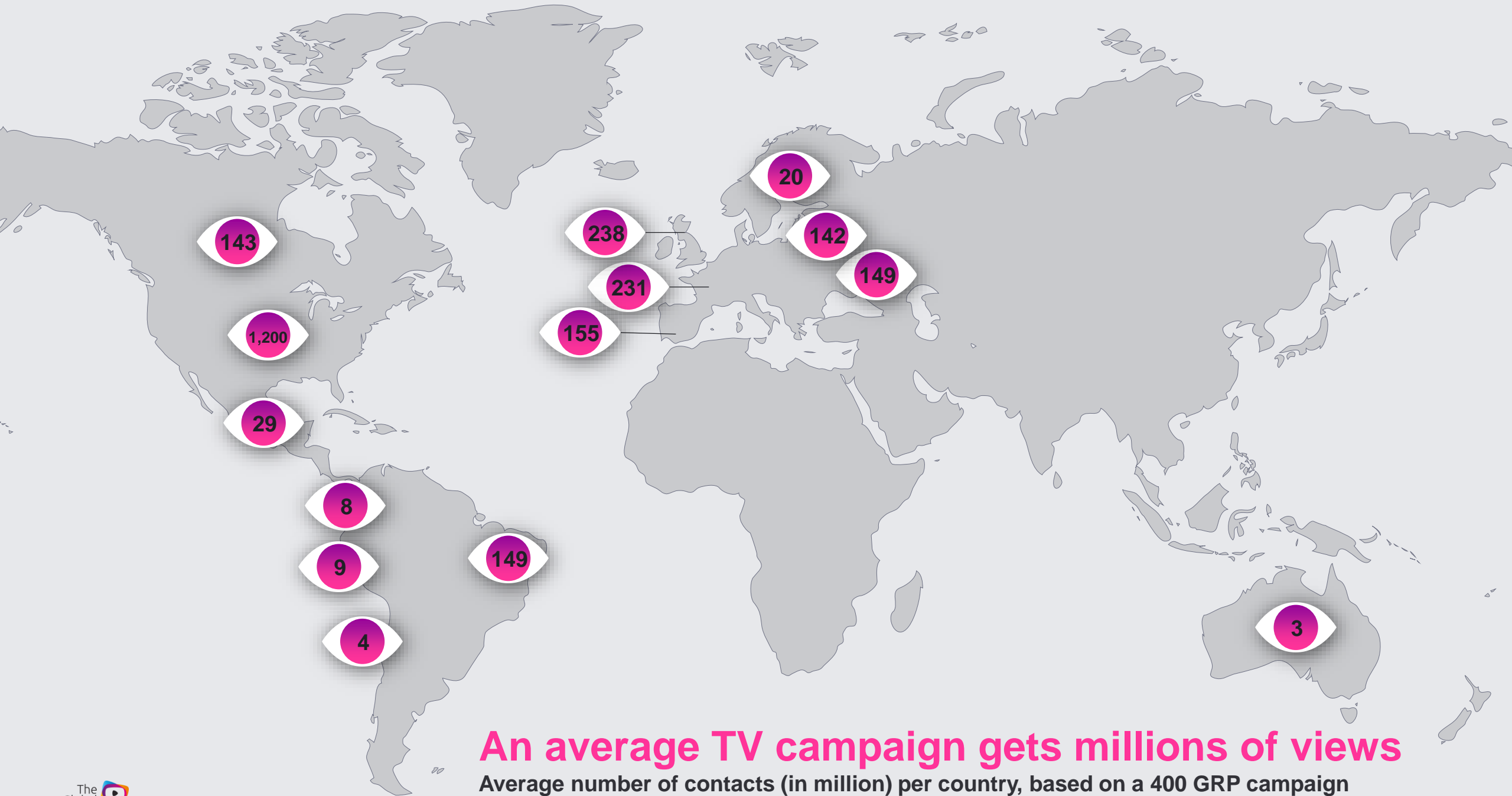
An average  
broadcast TV campaign  
in **Brazil**  
gets:



**Million views**







## An average TV campaign gets millions of views

Average number of contacts (in million) per country, based on a 400 GRP campaign

# An average TV campaign gets millions of views - sources

- Belgium : CIM TV, 4+ // 2016
- Brazil: Kantar Ibope Media – MW Telereport – Complet PNT. June 2016. Viewers from Atlas Globo Universe: 199,426,843
- Canada: Based on Numeris' population estimates for the 2016-2017 Broadcast Year (August 29, 2016 – August 27, 2017) . Individuals 2+
- Chile: Kantar Ibope Media, 2016 Population 4+ 6,847,690
- Colombia: Ibope Colombia 2016 Full year / 7am – 12am Population 4+ 19,368,910
- Czech Republic: PEM data, ATO - Nielsen Admosphere, 2017. Target group 4+
- Finland: Dagmar Media. Gross contacts 20,904 ,000 All population 4+ Target group size: 5,226,000. 3 weeks campaign (weeks 34-36/2017)
- France: Médiamétrie 57,974,000 equiped TV 2016
- Ireland: TAM Ireland
- Italy: AUDITEL, year 2016, individuals 4+
- Mexico: Nielsen IBOPE México. June 2016 / 7am-12am. Population 4+ 55,241,32
- Netherlands: 2016 Stichting KijkOnderzoek (SKO)
- Peru: TV Data 8.0 (Kantar Ibope Media) 2016 Target: Total Lima + 6 cities Population 3+ 12,723,886
- Poland: Nielsen Audience Mesurement Poland, 2016, All individuals 4+.
- Slovenia: AGB Nielsen, Total individuals. Q1 2017. Actual figure: 7,538,917
- Spain: Source: Kantar Media, Spain, Target all adults, September 2017
- Switzerland: Mediapulse TV panel (MediaWizard), D-CH + F-CH, March 2016, Adults 15+
- UK: BARB 2016.
- Ukraine: PPM Nielsen Ukraine, January to October 2017, Total TV, Audience : Universe (All people)
- USA: Nielsen Universe Estimates 2017/2018, P2+ Population: 304,500,000

# Popularity

TV has by far the biggest share of attention

“TV remains very important for us. It’s still a very, very important way for us to drive mass reach, and **the right reach** as well. “

**Andrew Clarke, CMO of Mars**

*February 2017*

# TV is 94% of video time in the Netherlands

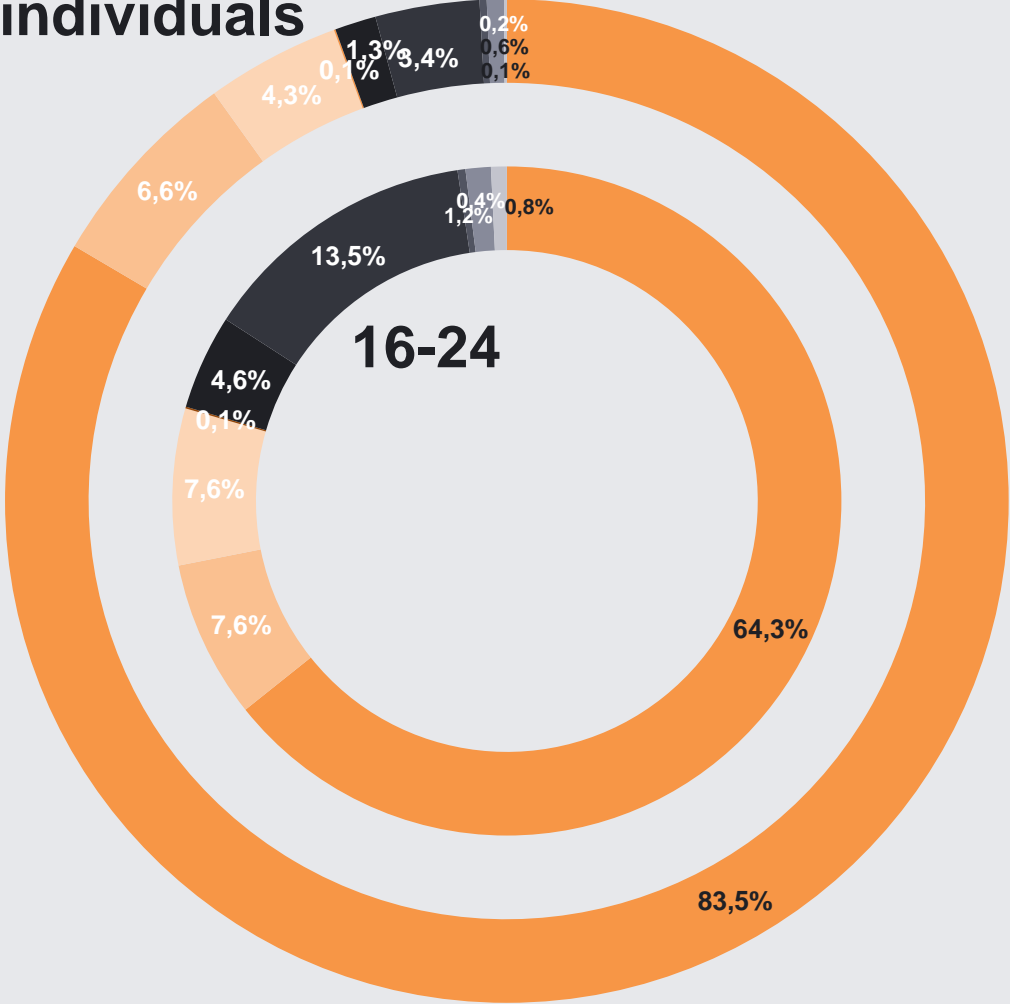
## Average video time per day

All individuals: 217 minutes

16-24: 131 minutes

- Live TV
- Playback TV
- Other TV content
- Broadcaster VOD
- YouTube
- Other online video
- Online 'adult' XXX video
- Cinema
- Subscription VOD

All individuals



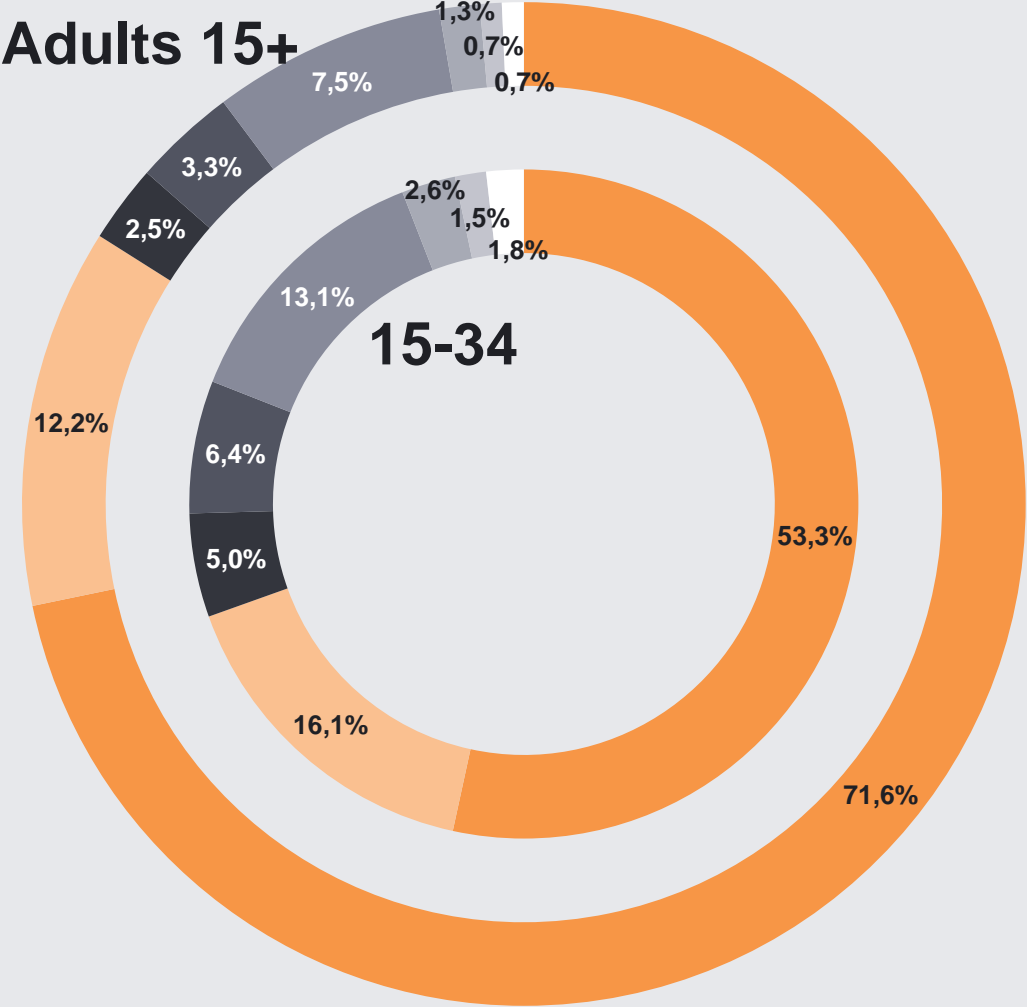
# TV is 84% of video time in Ireland

## Average video time per day

Adults 15+: 221 minutes

15-34: 212 minutes

- Live TV
- Recorded TV
- NET "On Demand" / From Players
- Stand alone video service / Paid for service
- Short form video
- DVD
- Pay Per view Sports
- Other Internet



# Resilience

TV viewing is steady throughout a decade of innovation and different stages of life



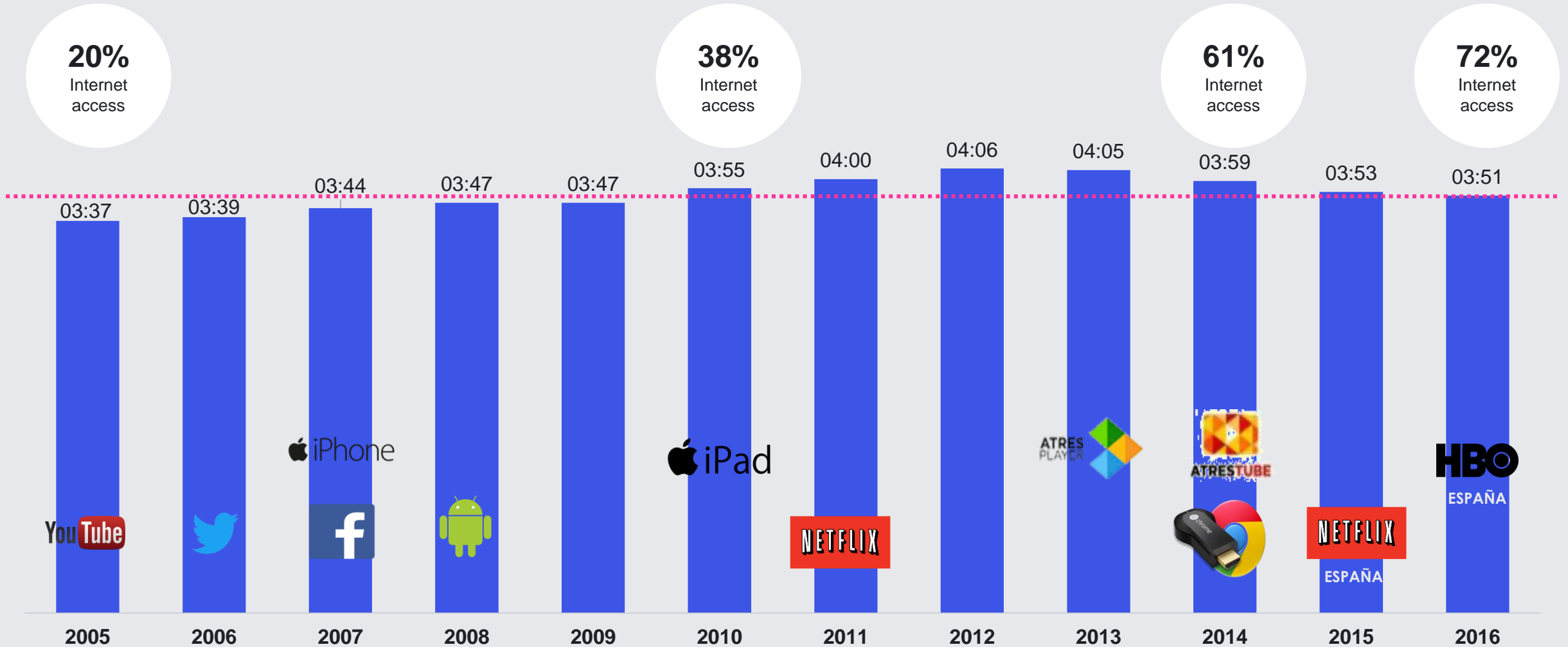
“TV still works, obviously, but how we plug it with digital is becoming more and more important. You can’t separate digital from what happens on air.”

**Seth Kaufman**, CMO of Pepsi North America Beverages

*October 2016*



# Hours of TV viewed on a TV set per day

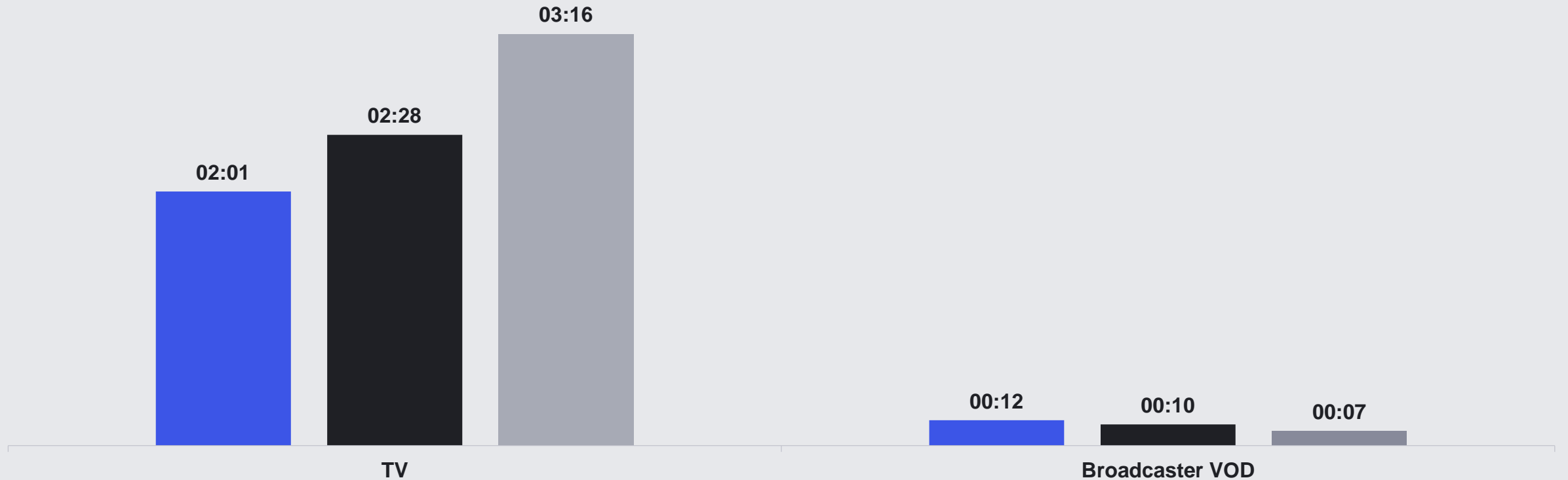


The pink line represents the average time spent (03:51)

# Italian Millennials' TV viewing increases as they get older and have kids

Average hours viewed per day

■ 16-24 ■ 25-34 ■ 25-34 with children



# Impact

TV is the most trusted and impactful form of advertising

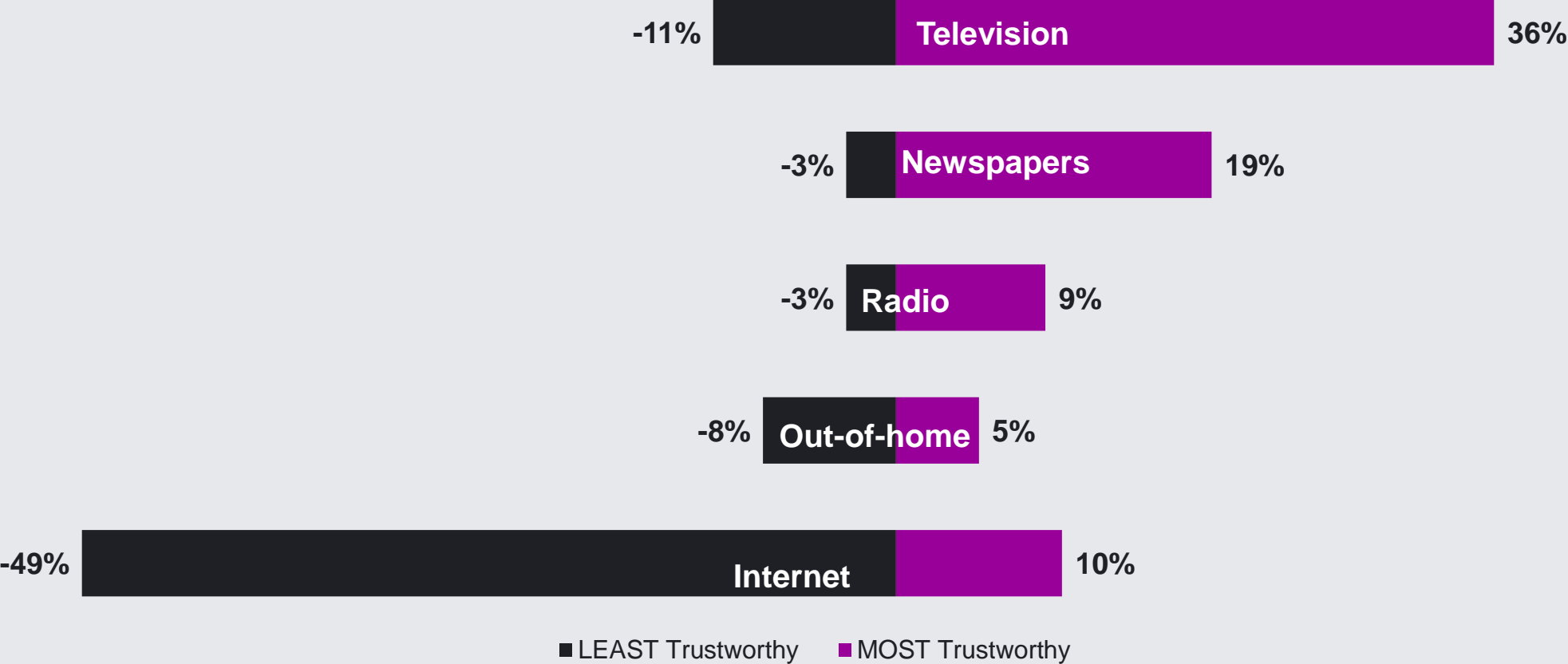


“A lot of our **campaign recall comes from TV** and not from Digital. When ads on Facebook just flow by, with TV ads we’re really able to tell our story.”

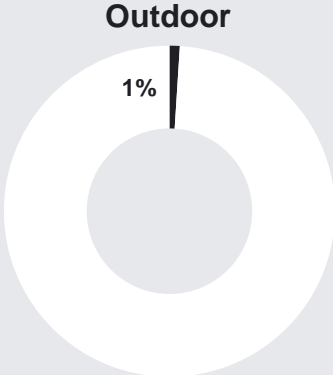
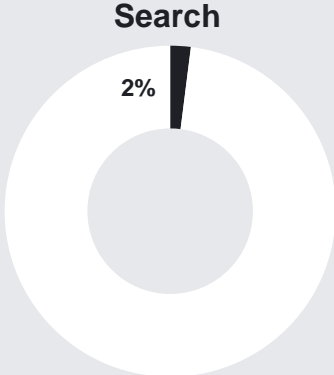
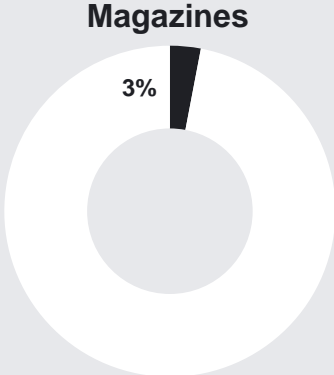
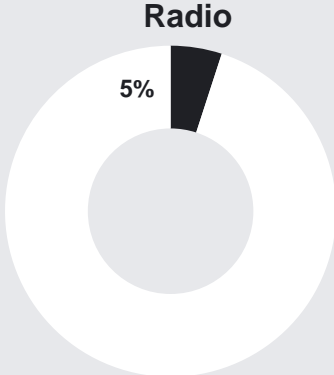
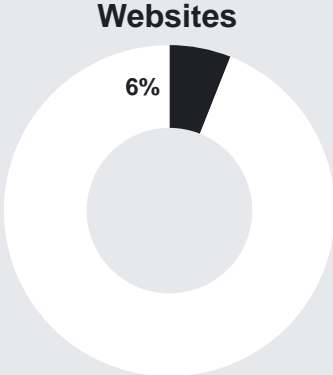
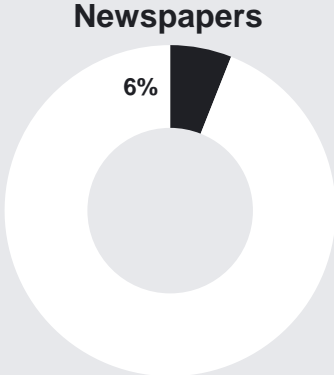
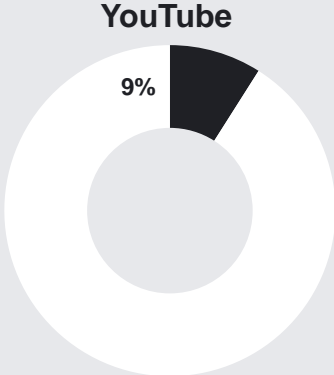
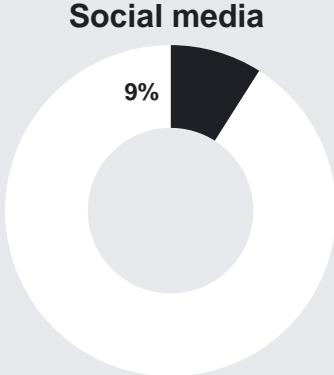
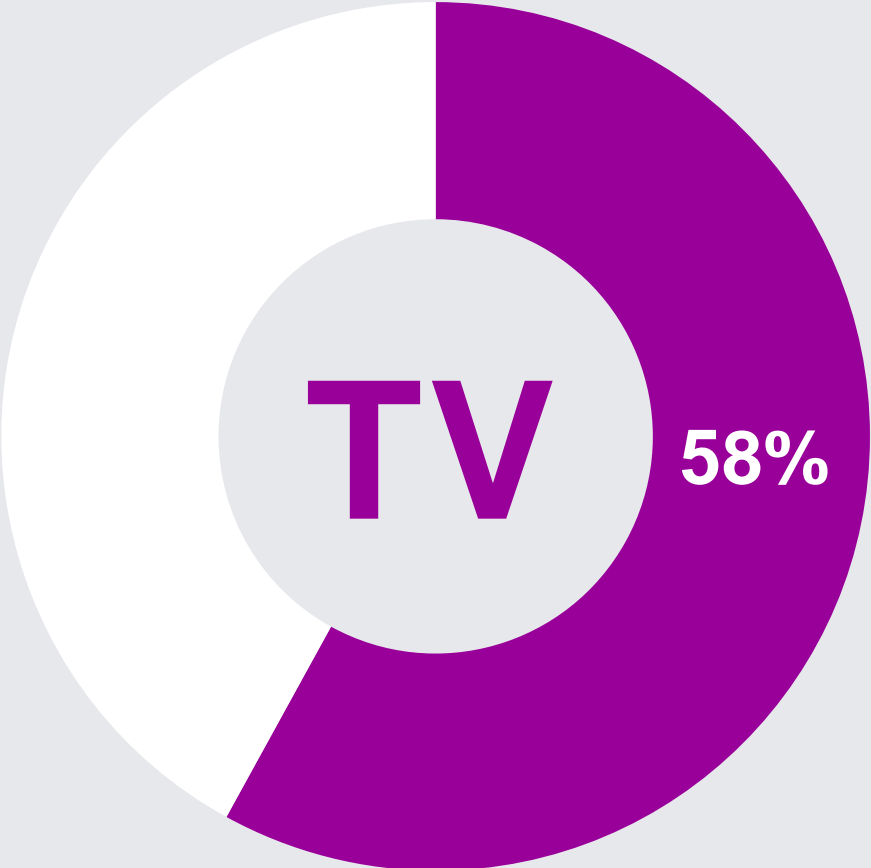
**Per Carleo**, Marketing Director Sweden of Volvo

*June 2017*

# TV is by far the most trusted form of advertising



# TV ads evoke emotions more than ads in other media



# Effectiveness

Advertisers invest in TV advertising because it pays back

“When we run a heavy TV schedule, we see a **lift in sales and product awareness**. We need to run two weeks of digital to get the reach of one day of broadcast.”

**Rich Lehrfeld**, Senior VP- Global Brand Marketing and Communications of American Express

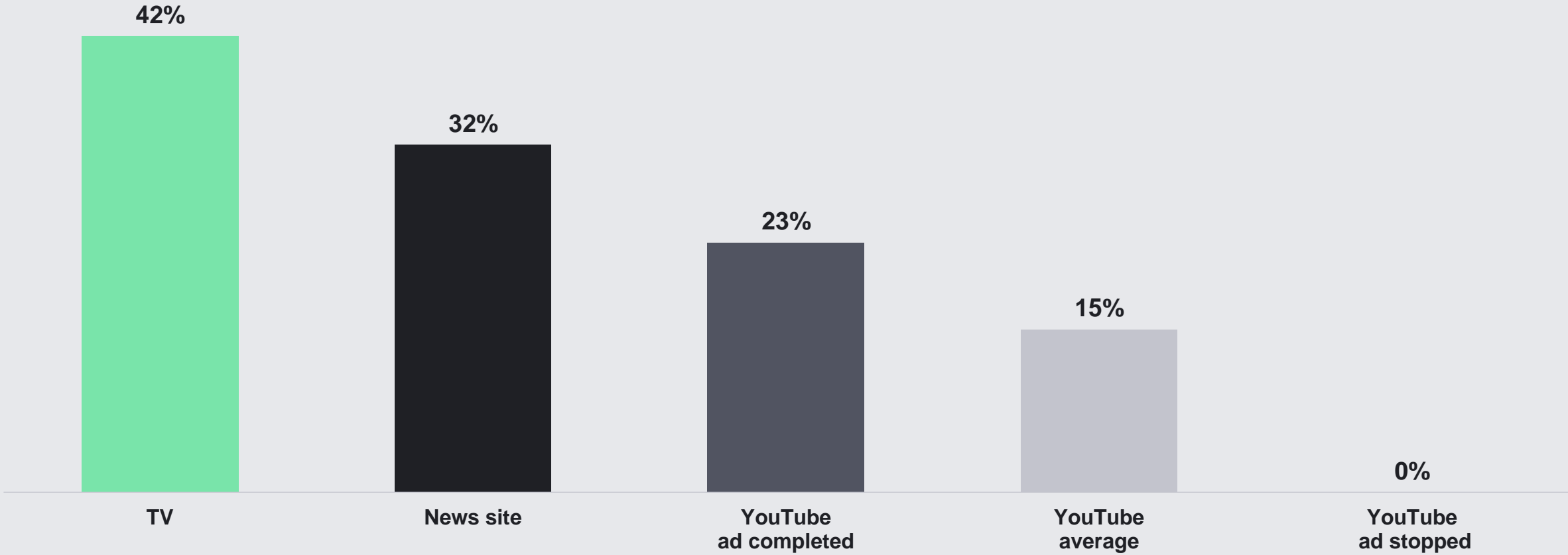
*April 2016*



TV generates  
profit:  
**\$1 net** invested in TV  
pays back **\$1.70**



# TV generates almost three times the brand recall of YouTube



# Online brands see their online traffic strongly increase along with their TV adspend

Monthly website unique visitors comparison (in thousands)

Company	Month prior to TV launch	Monthly average: TV launch-Feb 2017	% increase
23andMe	421	968	+130%
Airbnb	1,442	5,872	+307%
Birchbox	1,122	2,221	+98%
Blue Apron	159	1,872	+1,075%
Casper	131	512	+292%
Fitbit	4,598	14,247	+210%
Letgo	N/A	10,201	↑
Lyft	7,920	13,048	+65%
Nest	N/A	1,576	↑
Simplisafe	145	557	+284%
Sling	2,143	3,842	+79%
SoFi	248	593	+139%
Uber	N/A	30,955	↑
Yelp	77,900	86,755	+11%

Each of the featured “disruptor” brands saw an immediate **significant lift** in website visits once their first TV campaign launched.

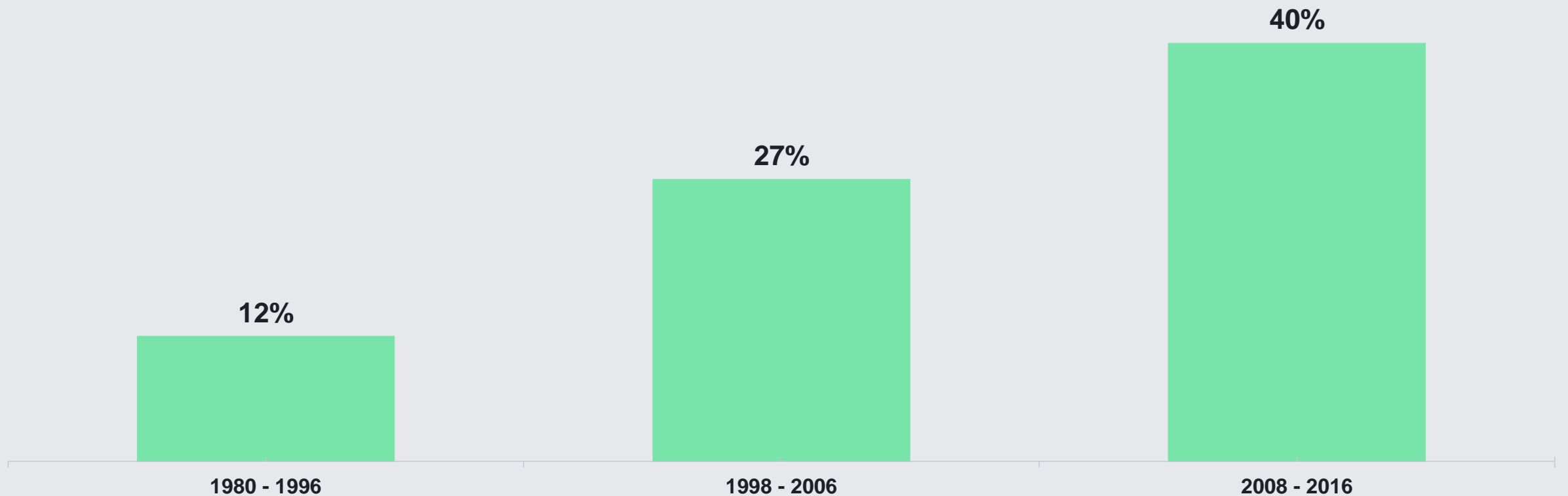
# TV drives traffic to the web

- TV ads boost brands' organic traffic\*
- The organic traffic of an advertiser's website during a TV campaign increases by 44%
- This increase applies to pure players as well as multichannel advertisers

	All advertisers	Pure-players	Multichannel advertisers
<b>Campaigns</b>	220	142	78
<b>Advertisers</b>	80	50	30
<b>GRP (campaign average)</b>	339	340	336
<b>Average organic traffic increase in %</b>	43.9%	43.5%	44.6%

# TV is becoming more effective

% increase in average number very large business effects from adding TV (e.g. market share, brand loyalty, profit, sales, etc.)



# Complementarity

TV makes all other media more effective



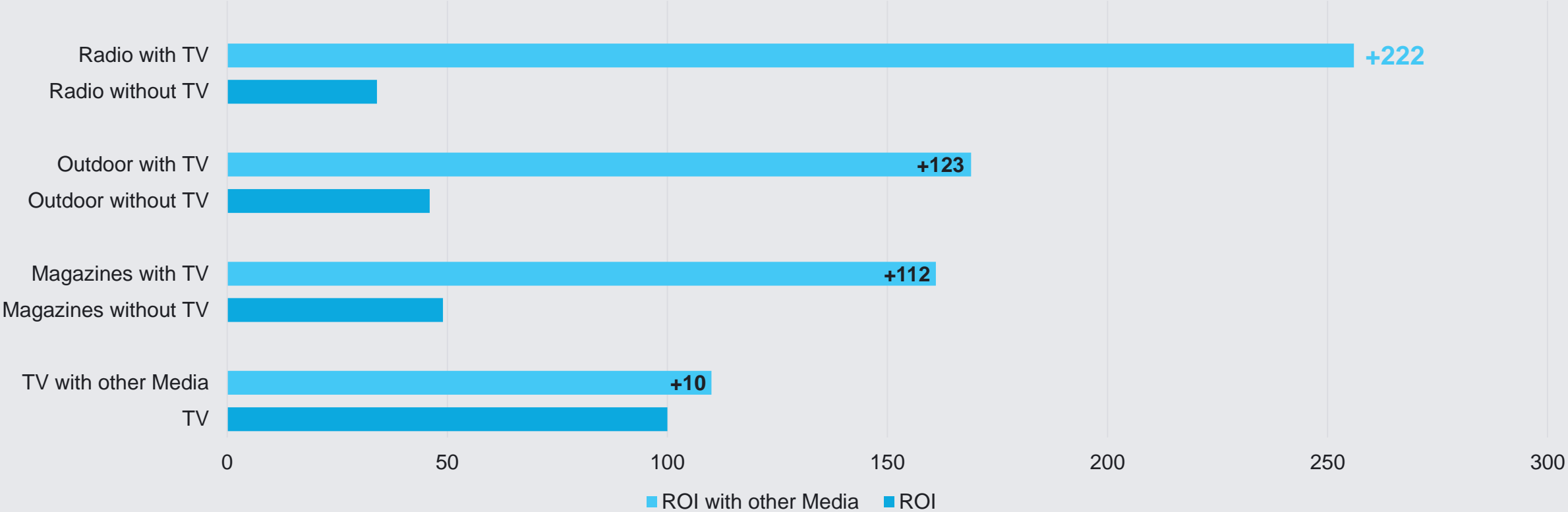
"Investors think that digital growth will inevitably come at the expense of the growth of TV, we disagree with this view. In fact, we think that **TV ad growth can accelerate** from a 2% per annum we have seen over the last three years to 5-7% between now and 2030"

Omar Sheikh, US Media / Cable Analyst of Credit Suisse

*May 2017*

# TV boosts other media

Average ROI per Medium, Mono- versus Mix with TV, Index\*







**The Global TV Group** is an informal grouping of broadcasters' and sales houses' trade bodies, whose joint objective is to promote television. TGTVG is not a legal entity, it does not have a permanent staff, nor offices.

<http://www.theglobaltvgroup.com/>