



Broadcast TV in a Digital World

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- 3rd Party Independent Market Research
- Real World Examples



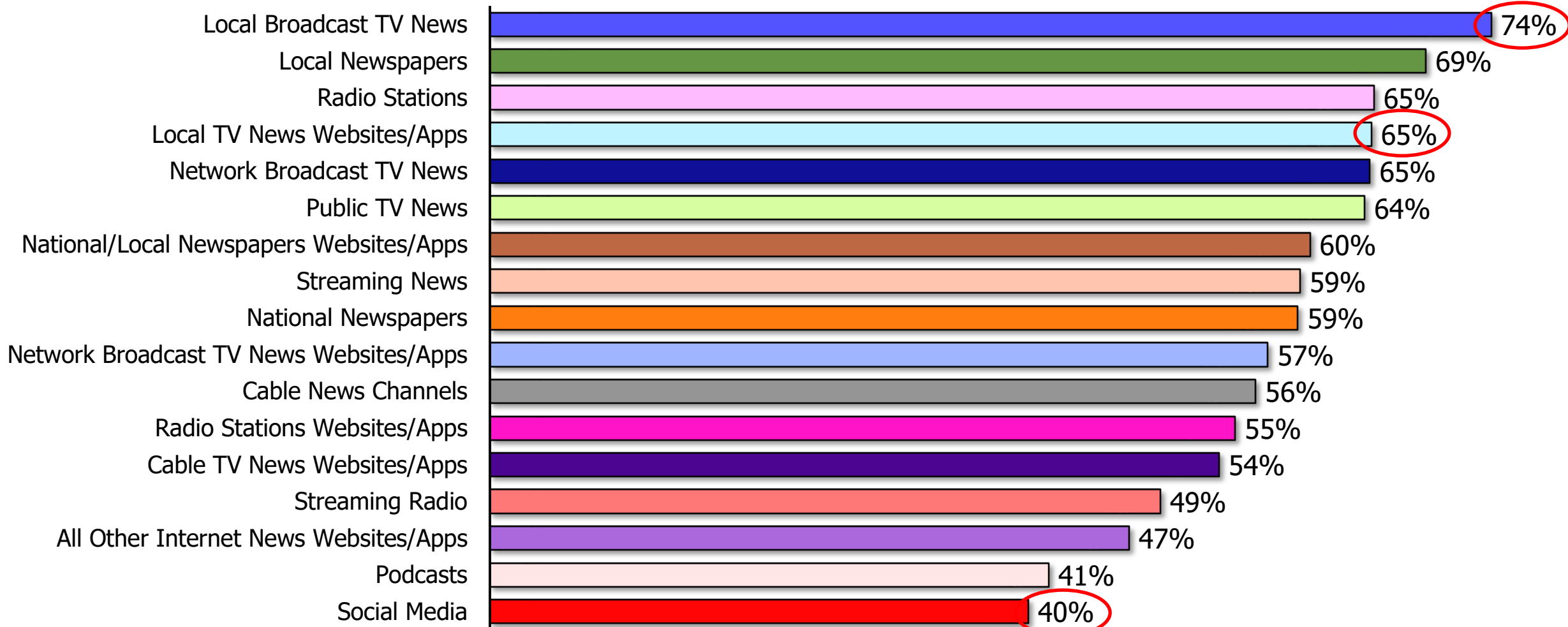
**How many licks does it take
to get to the center of a
Tootsie Pop?**

Scenario #1

**Is TV relevant in a
Digital World?**

Importance of Trust

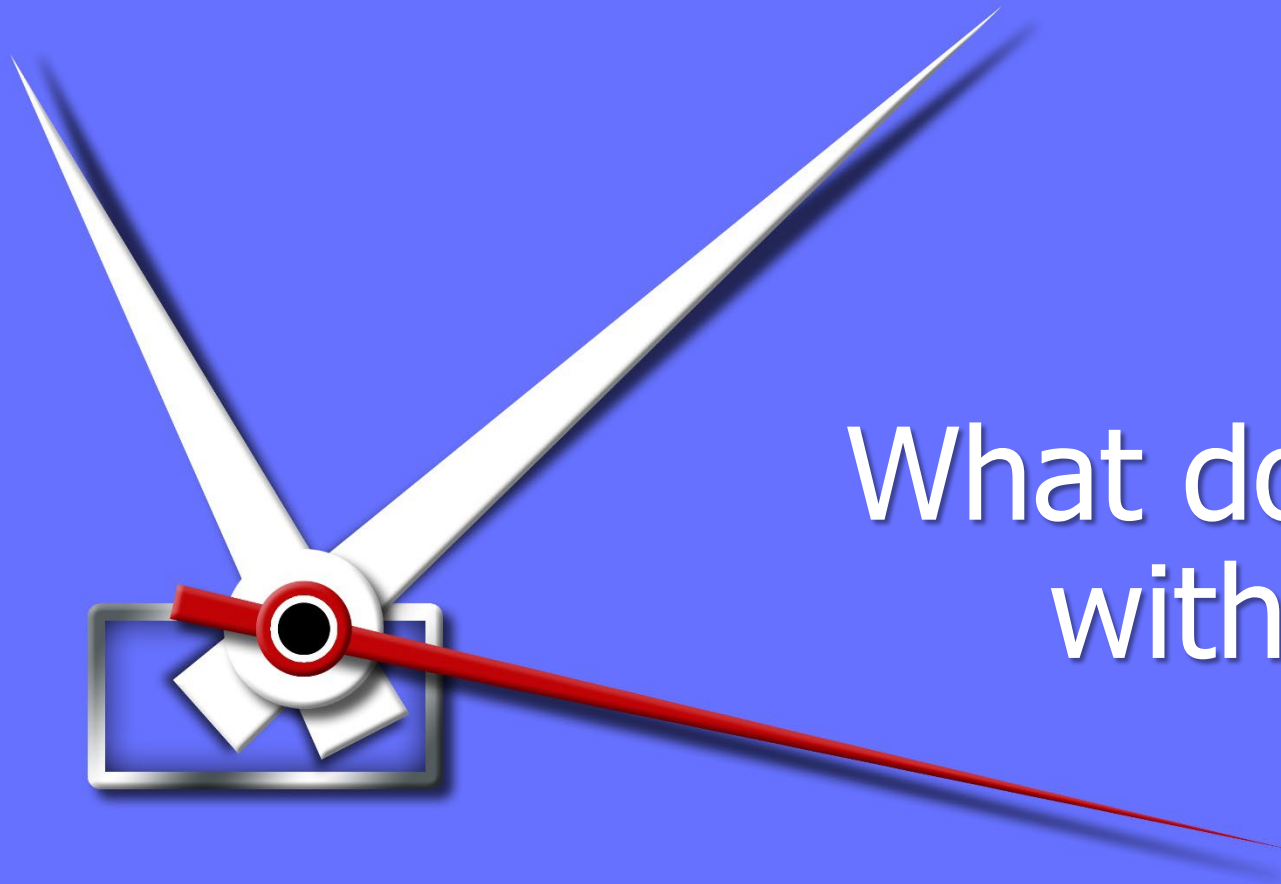
I trust the News/Information that I see/hear on this media source:
Percent Agree



Source: GfK TVB Media Comparisons Study 2024. Persons 18+. Agree Strongly or Agree Somewhat.

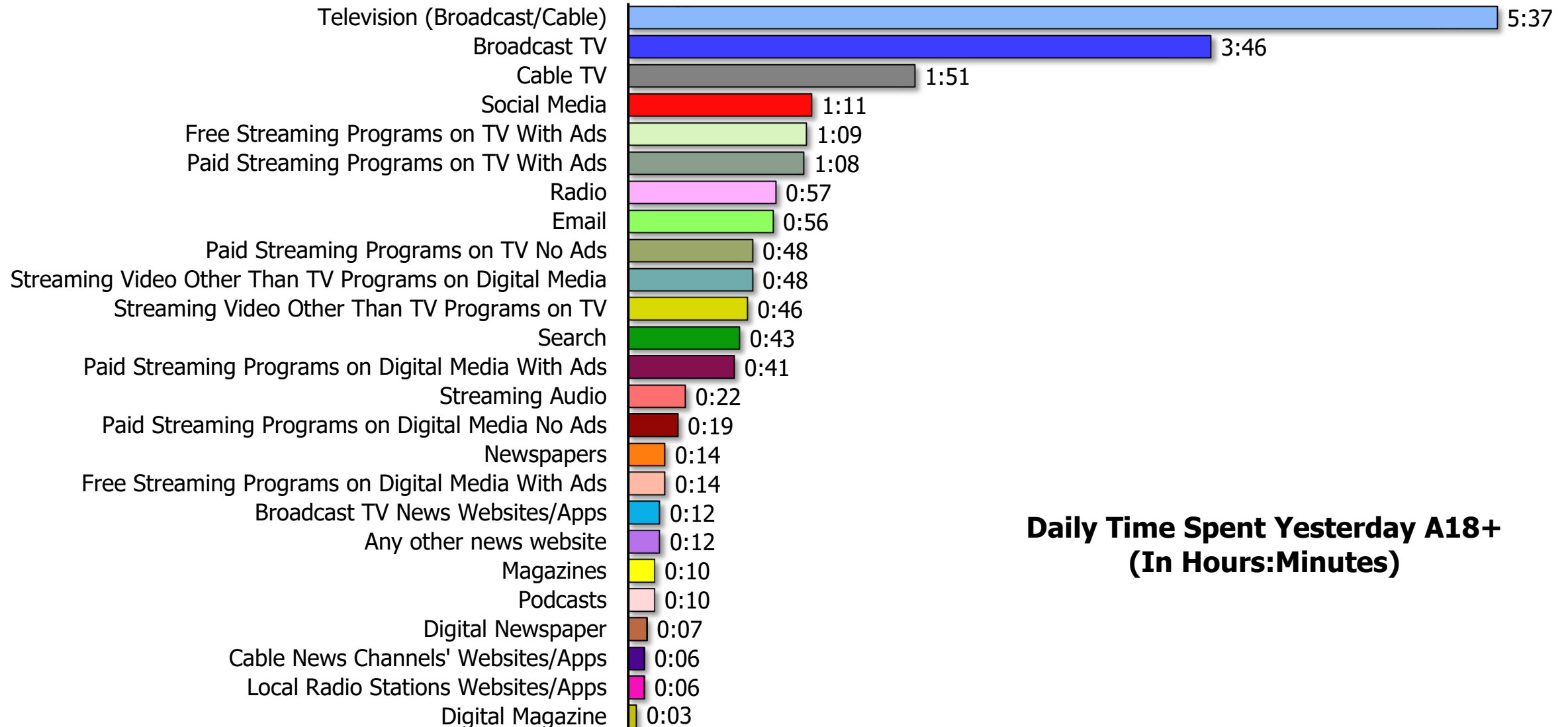
Q09 - For each source, please indicate the extent to which you agree or disagree with the following statement: I trust the News that I see/hear on this media source.

Streaming news includes programs like ABC News Live, NBC News Now, Live Now from Fox on Roku, Tubi, etc.



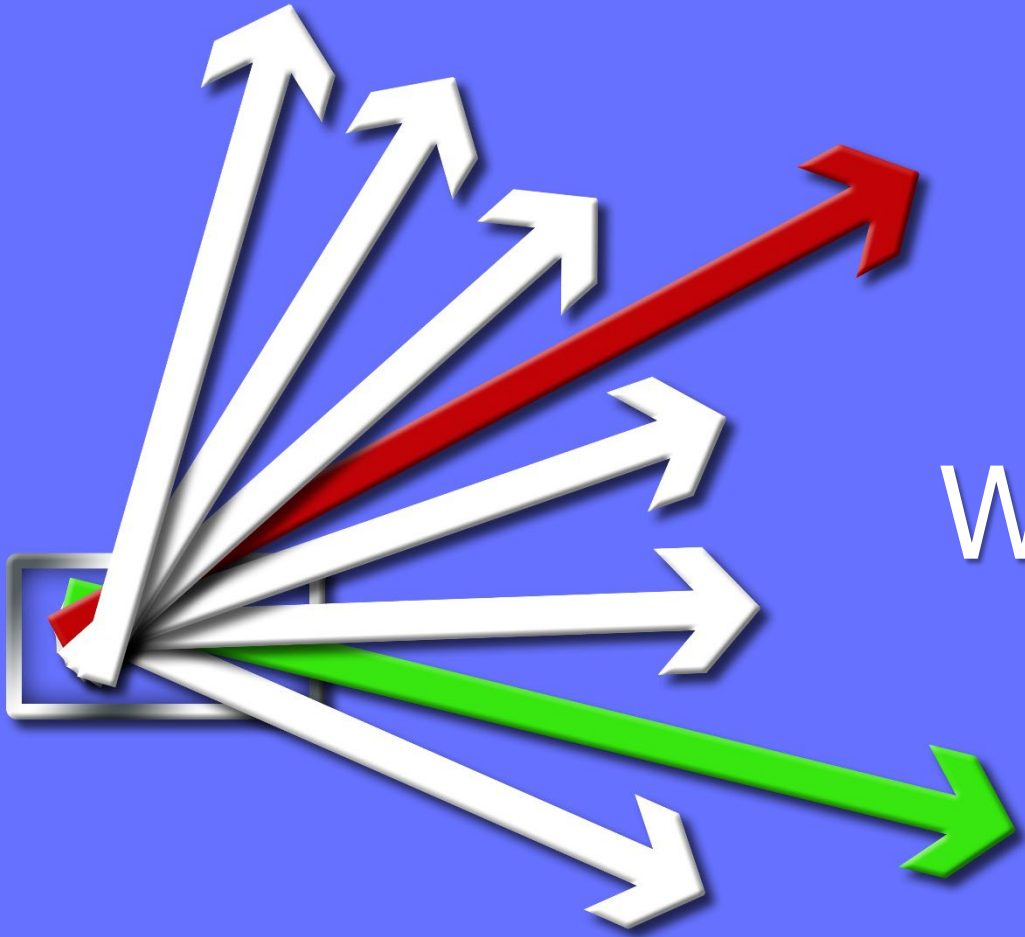
What do Consumers do
with their Time?

What did you do with your TIME yesterday?



**Daily Time Spent Yesterday A18+
(In Hours:Minutes)**

Source: GfK TVB Media Comparisons Study 2024. M-S 4A-2A. Persons 18+. Online/internet platforms such as email, social media, internet radio and websites, are totaled for any online device-PC, Smartphone and Tablets. Broadcast TV News Websites/Apps includes local TV station & network websites/apps for news/weather/sports.

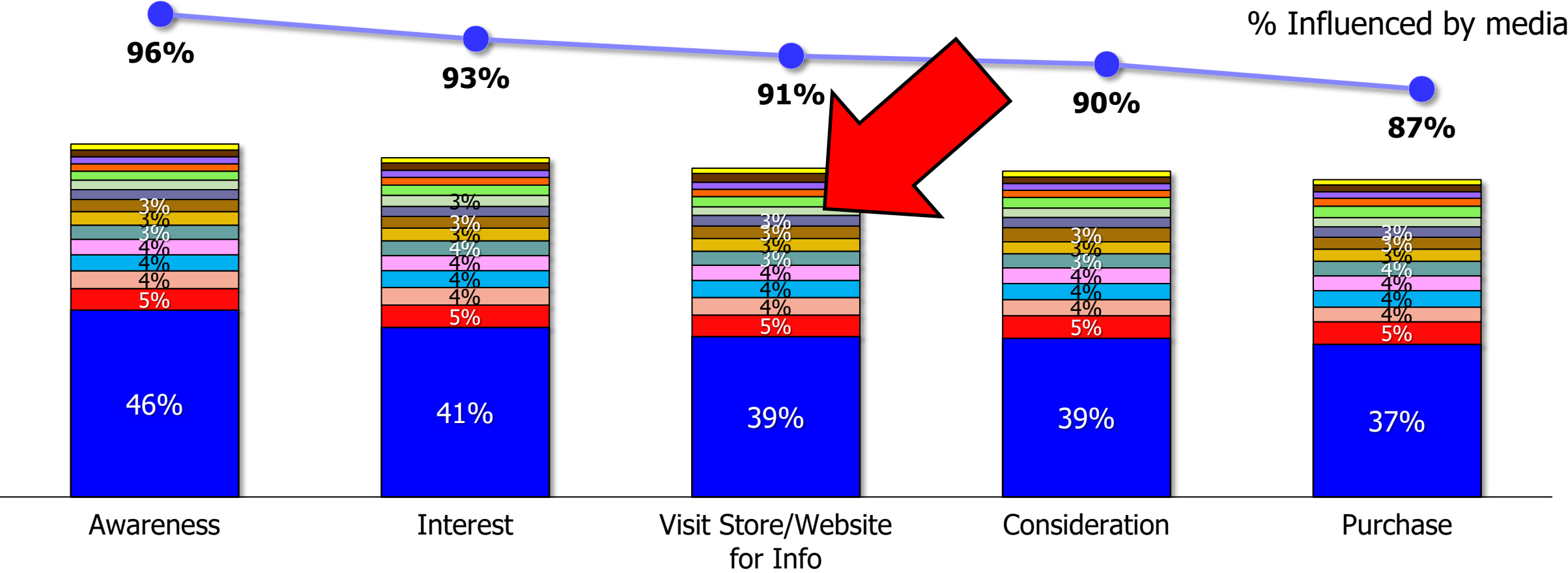


What Influences You?!

Stages of the Purchase Decision Process



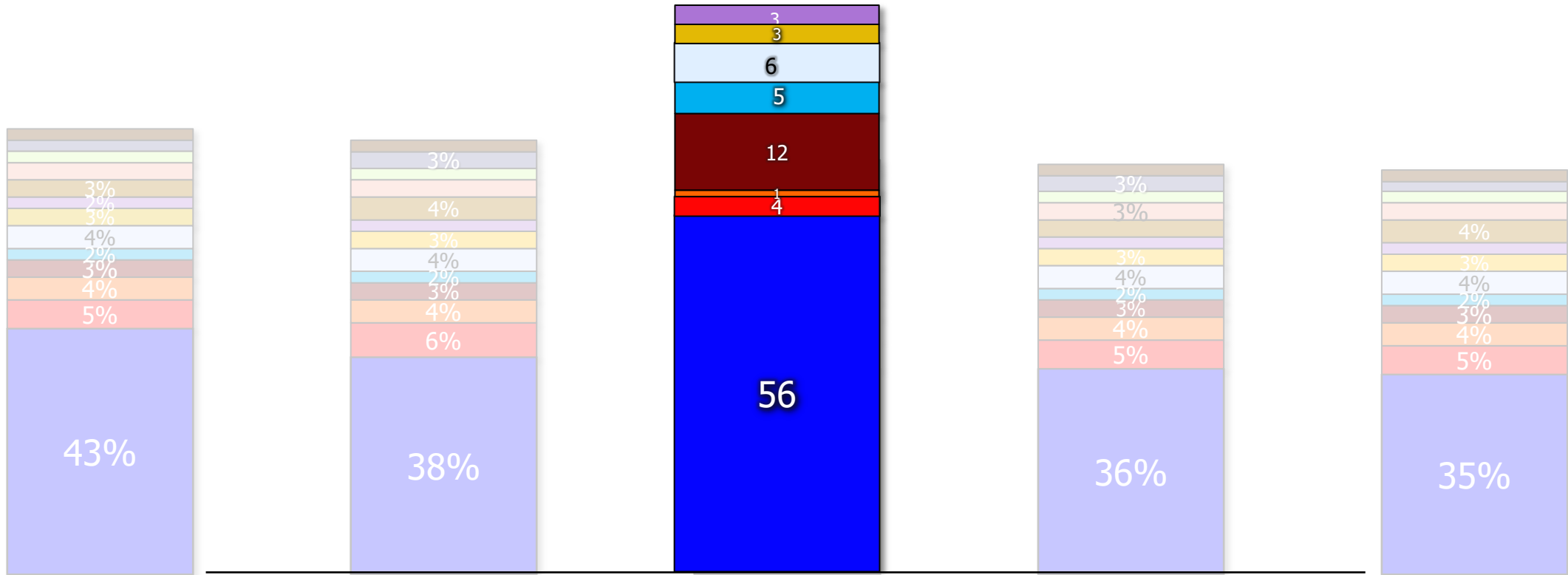
What Influenced Consumers Most



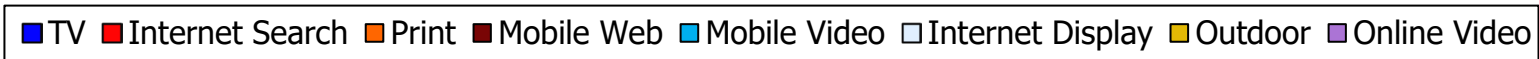
- Television (Broadcast & Cable)
- Social Media
- Paid Streaming TV With Ads
- Broadcast TV web/apps
- Radio
- Streaming video other than TV/movies w/ads
- Outdoor
- Ad in mail
- Internet video ad
- Free Streaming TV with ads
- Email
- Newspaper (print only)
- Movie theater
- Ad on a website
- Magazine (print only)

Source: GfK TVB Purchase Funnel 2024 A18+ QA4/QA5/QA6/QA7/QA8 Most important for media with at least 1 funnel stage at 2%+ shown; 2%, 1%, & 0% not shown/labeled

Meta

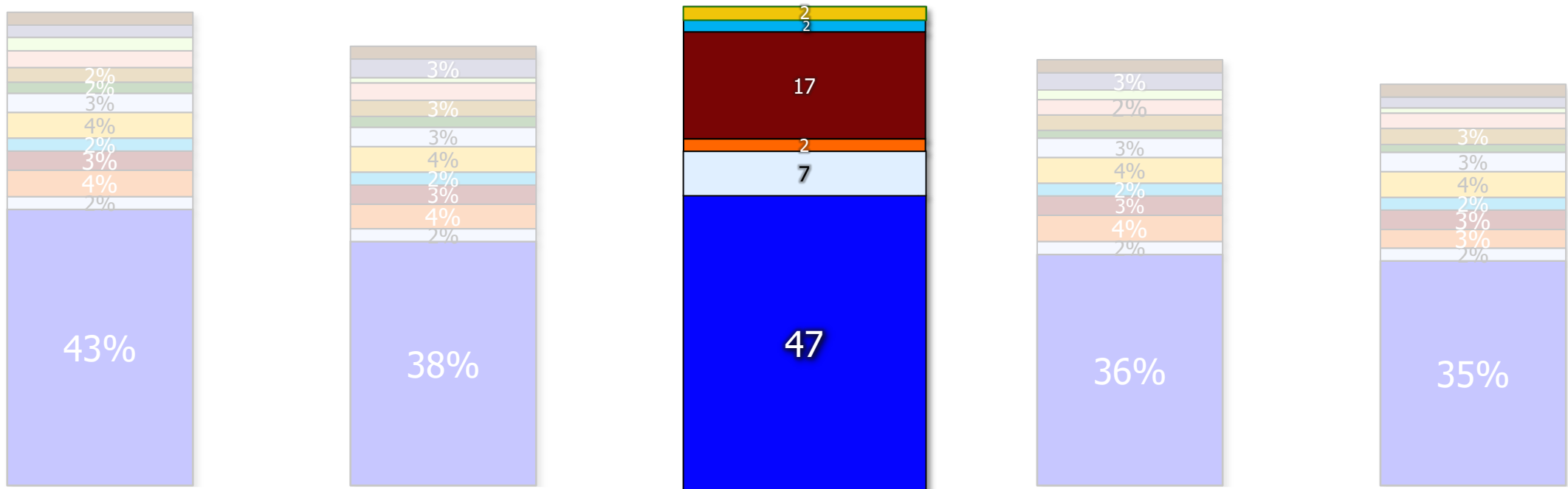


Meta % Media Mix



Source: Vivvix, Time Period: 7/1/2022-6/30/2023, TV= Spot TV, Network TV, Cable TV, SLN TV, Syn TV. Internet Display, Internet Search, Online Video, Mobile Web, Mobile Video, Outdoor. Print= Magazine, Sunday Magazines, Newspapers.

Google



Google % Media Mix



Source: Vivvix, Time Period: 7/1/2022-6/30/2023, TV= Spot TV, Network TV, Cable TV, SLN TV, Syn TV. Internet Display, Internet Search, Online Video, Mobile Web, Mobile Video, Outdoor. Print= Magazine, Sunday Magazines, Newspapers.



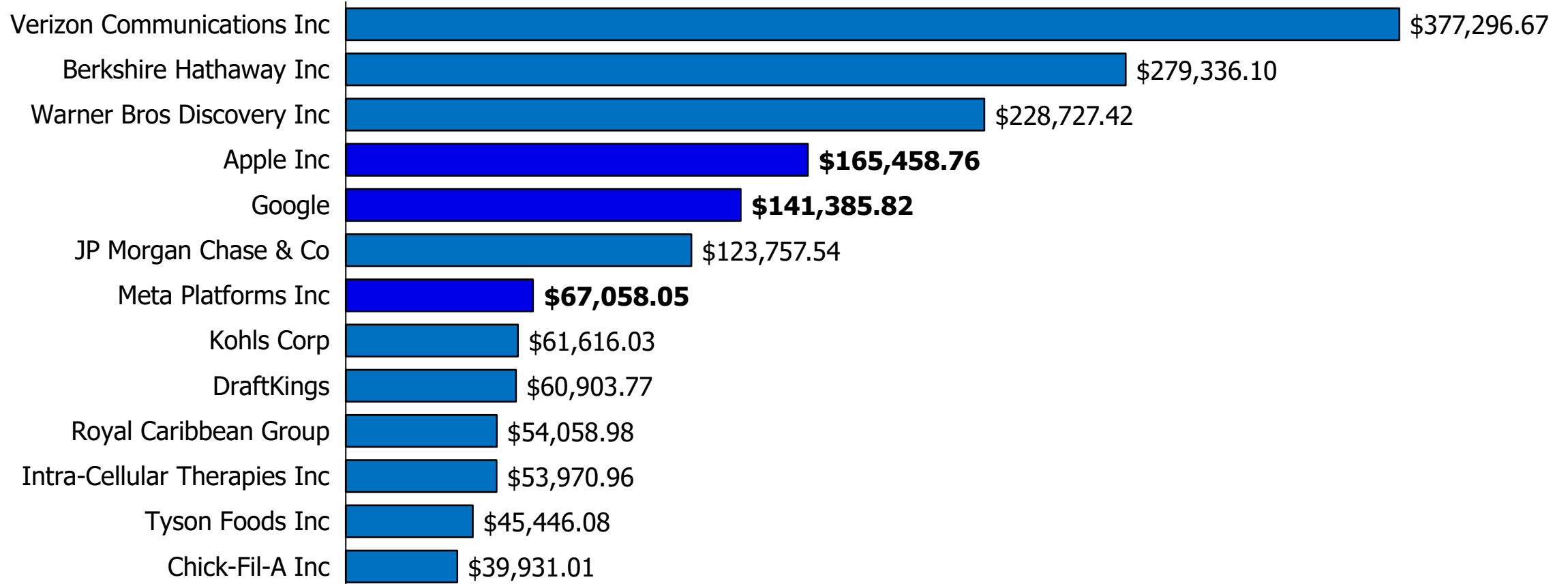
iSpot.tv

Top TV Ad Spenders

Digital Companies Spend Significantly on TV

TV Total Dollars in Millions

January 2023 to June 2023

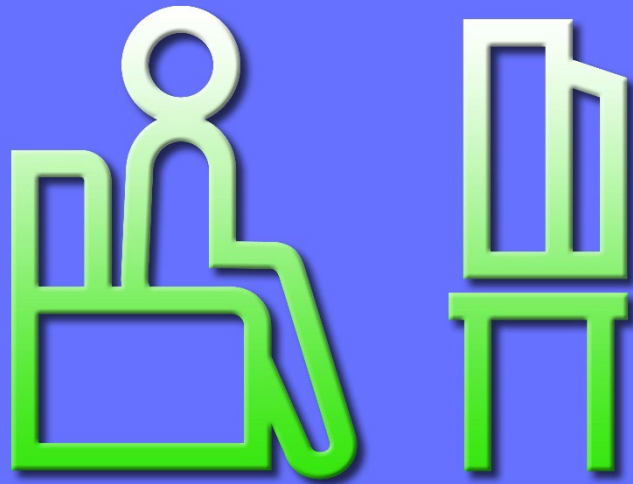


Source: Vivvix, 1/1/2023-6/30/2023 Spend on TV = Network, Spot, Cable Network, Syndication and Spanish Language Network. Parent Companies. Amazon & Google = Subsidiaries.

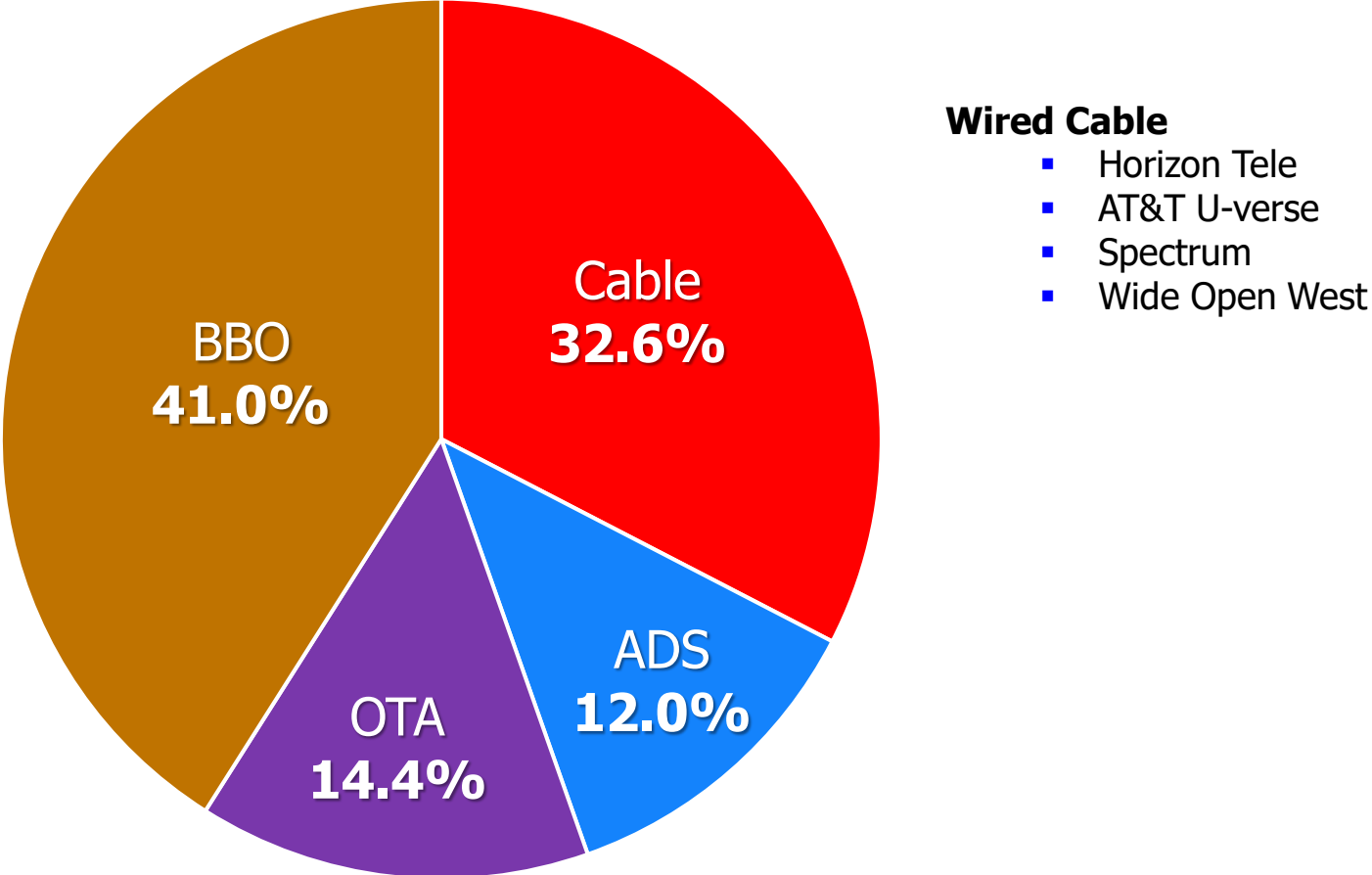
Scenario #2

**Everyone is Streaming,
is anyone watching TV?**

What are people doing in Columbus OH?



How consumers get their favorite content in Columbus, OH



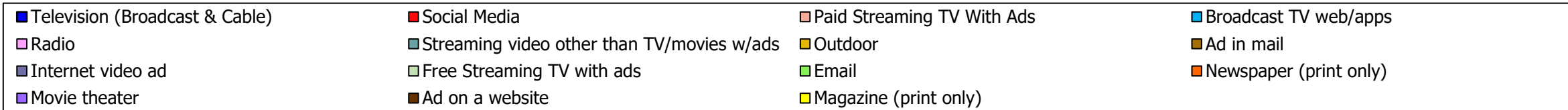
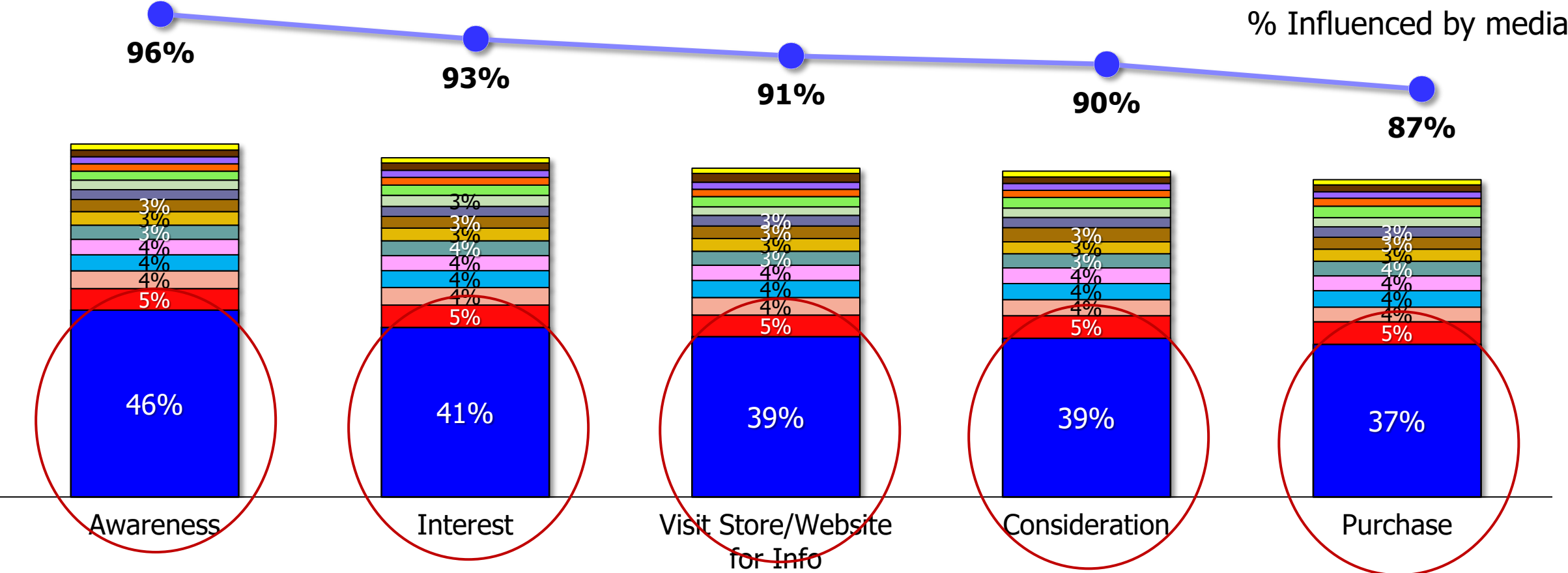
Source: The Nielsen Company – Feb'24 Columbus, OH DMA Quarterly UEs & DMA Cable Plus. (OTA=Over-the-Air or Broadcast Only homes).

In Columbus, OH the programming of choice is from Local TV Stations...

100 of the Top 100 Shows in February '24 were from Broadcast TV

Program Rank	Broadcast Stations	Ad-Supported Cable	Total
1-25	25	0	25
26-50	25	0	25
51-75	25	0	25
76-100	25	0	25
Total	100	0	100
%	100%	0%	100%

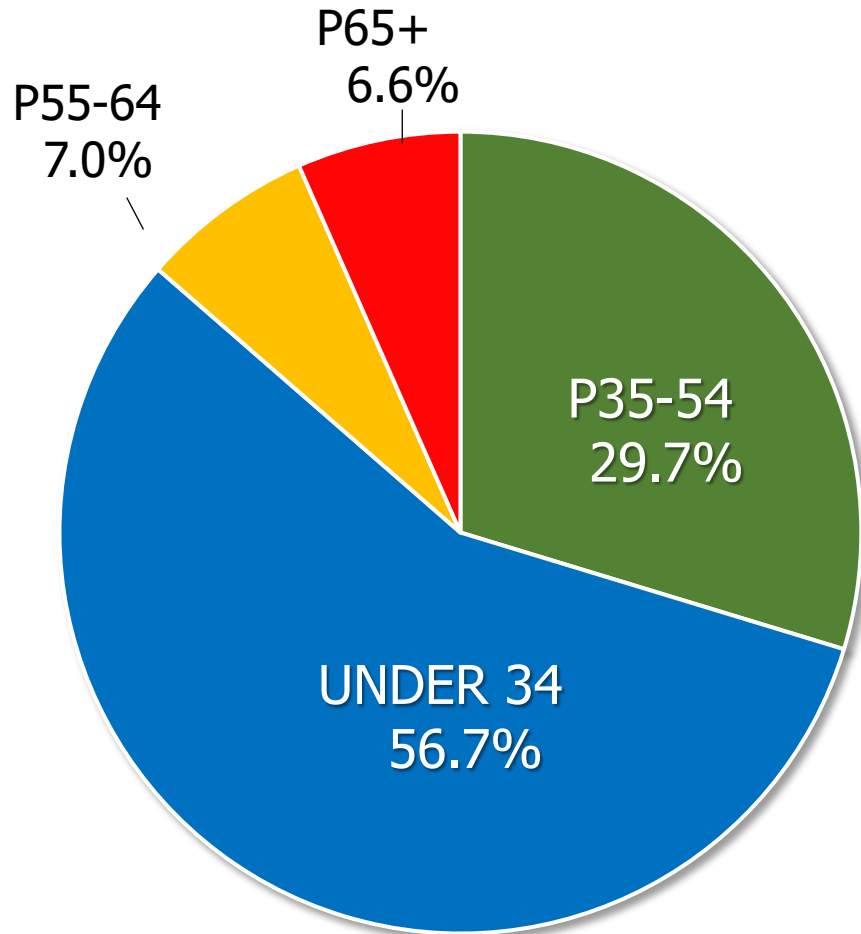
What Influenced Consumers Most



Source: GfK TVB Purchase Funnel 2024 A18+
 QA4/QA5/QA6/QA7/QA8 Most important for media with at least 1 funnel stage at 2%+ shown; 2%, 1%, & 0% not shown/labeled

Deep Dive on BBO Homes in Columbus

Only a small fraction of Columbus homes can be reached through streaming video ad buys (41% of homes with TV)

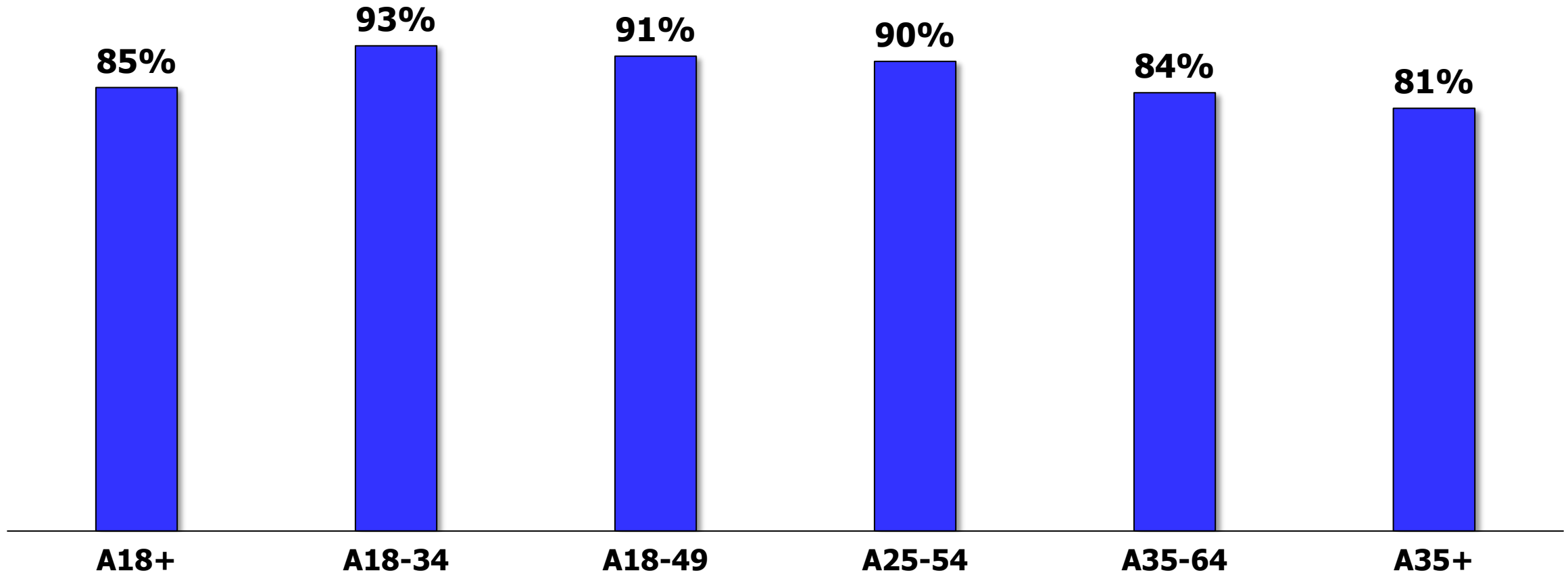


Of those homes...

Persons aged 34 and under
account for **56.7%** of all BBO homes!

“Have TV ads influenced your search selections?”

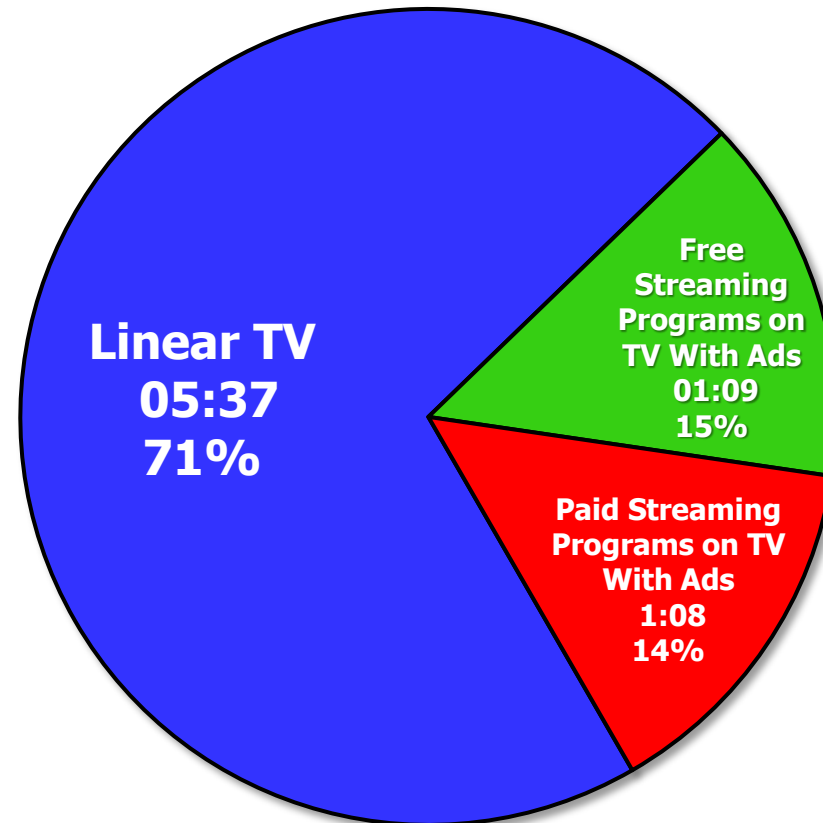
“Yes” Among Those Who Do Online Searches



Source: GfK TVB Purchase Funnel 2024; A18+, A18-34, A18-49, A25-54, A35-64, A35+
QA10 “When doing an online search, how often, if at all, have TV ads you have seen influenced you in some ways in your search?”
(Yes = combination of Every time, Most of the time & Sometimes) Among those who do online searches.

When looking only at platforms that have advertising, Linear TV Represents 71% of the Viewing Time

Time Spent on TV Screen
With Ads Only



Scenario #3

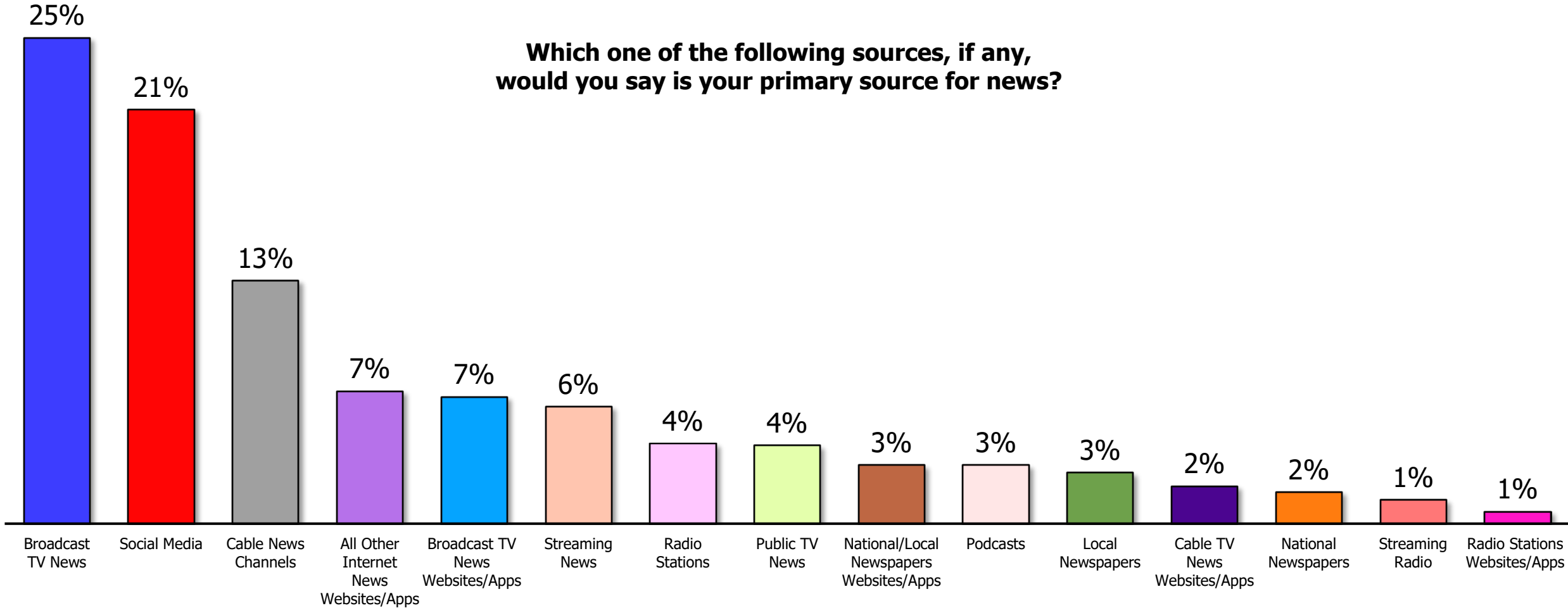
**If everything is going Digital
where does TV fit in?**



© marketoonist.com

The Primary Source For News: Broadcast Television

Which one of the following sources, if any, would you say is your primary source for news?



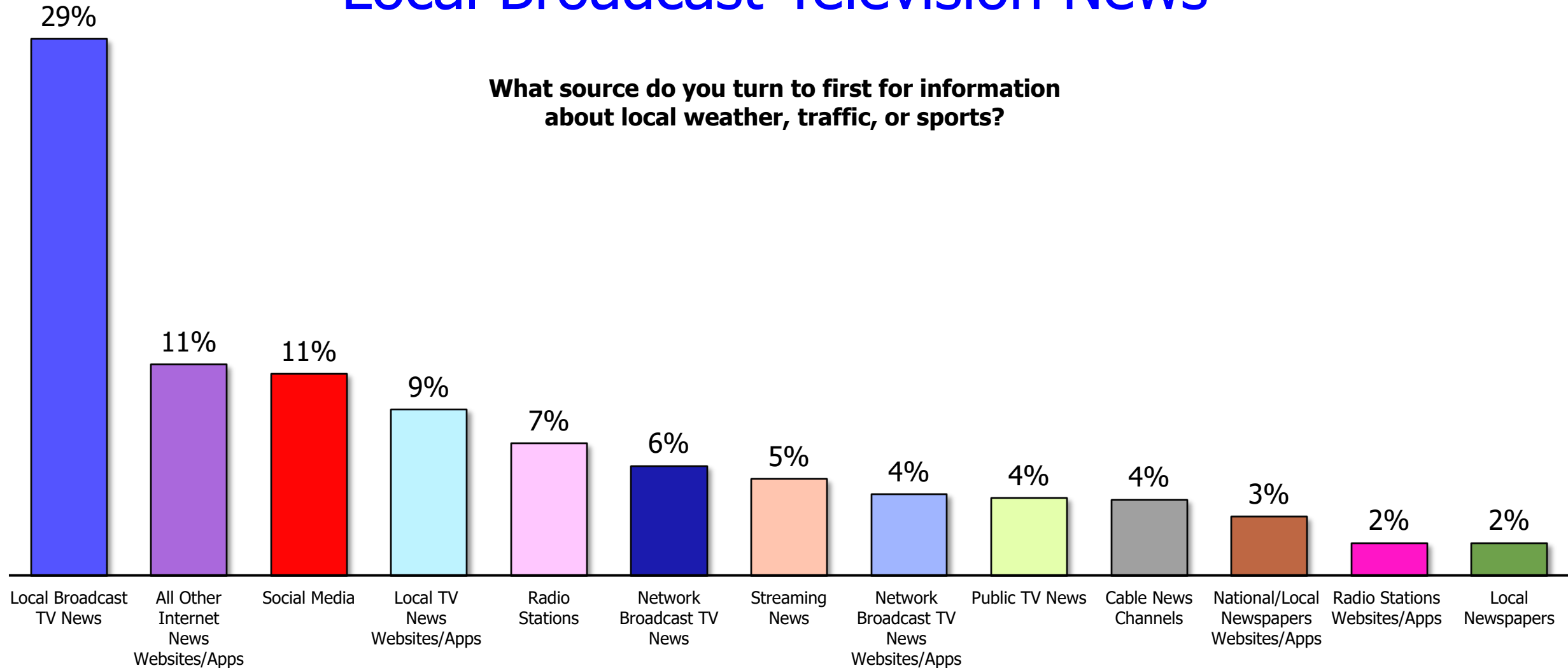
Source: GfK TVB Media Comparisons Study 2024. Persons 18+. Includes only those who chose a media.

Q05 - Which one of the following sources, if any, would you say is your primary source for news?

Broadcast TV News & Broadcast TV News Websites/Apps include local TV station & broadcast network telecasts and websites/apps for news/weather/sports.

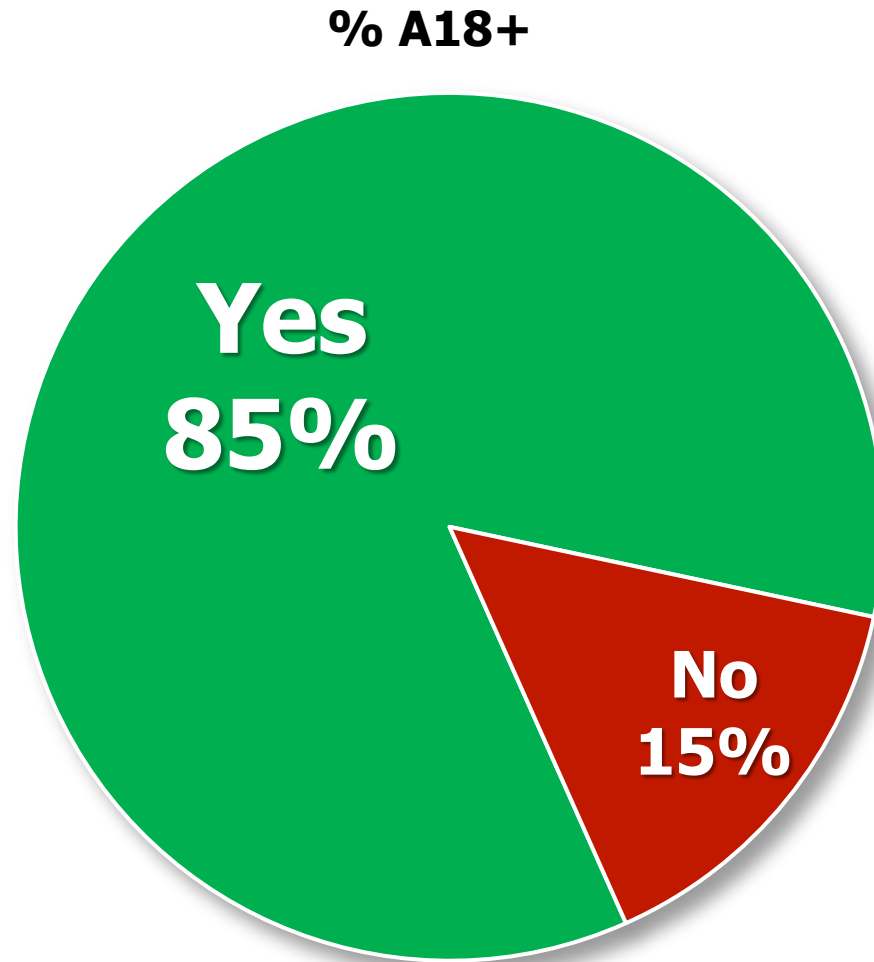
Streaming news includes programs like ABC News Live, NBC News Now, Live Now from Fox on Roku, Tubi, etc.

The Primary Source For Local Traffic, Weather & Sports: Local Broadcast Television News



Source: GfK TVB Media Comparisons Study 2024. Persons 18+. Includes only those who chose a media. QO6 - What source do you turn to first for information about local weather, traffic, or sports? Cable News Websites/apps, National Newspapers, Streaming Radio & Podcasts were under 2% each. Streaming news includes programs like ABC News Live, NBC News Now, Live Now from Fox on Roku, Tubi, etc.

“Have TV ads influenced your online search selections?”

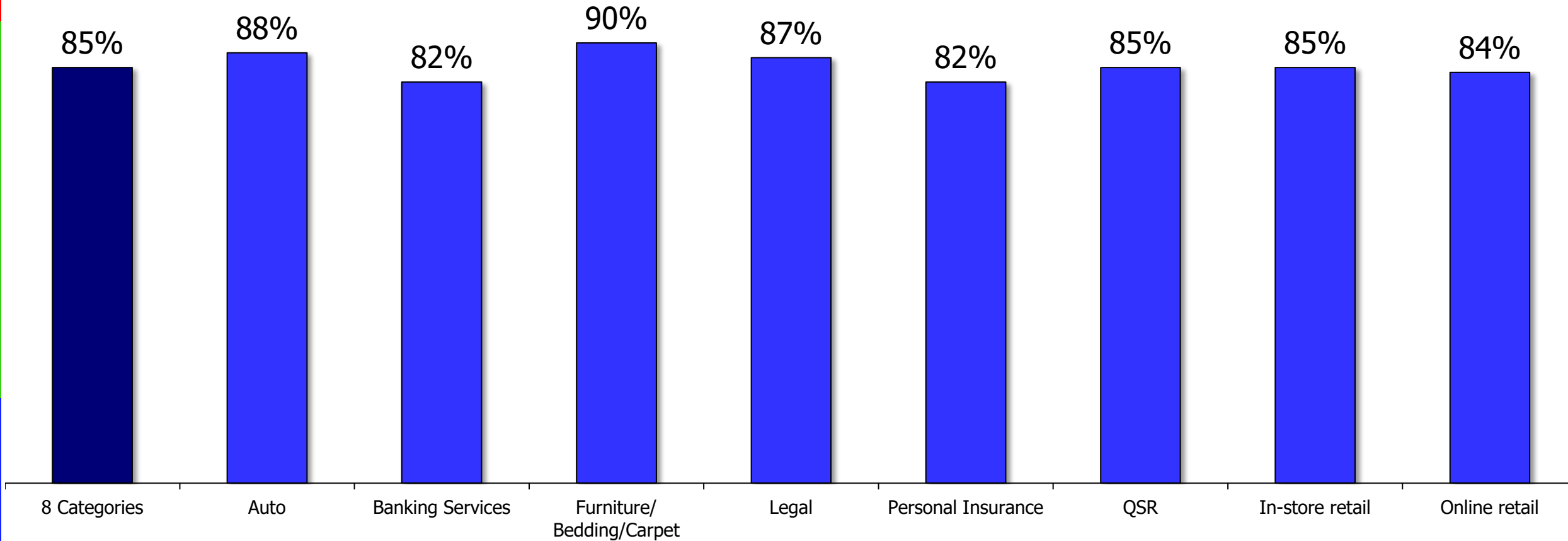


Source: GfK TVB Purchase Funnel 2024 A18+

QA10 “When doing an online search, how often, if at all, have TV ads you have seen influenced you in some ways in your search?”
(Yes = combination of Every time, Most of the time & Sometimes) Among those who do online searches.

“Have TV ads influenced your search selections?”

% Yes

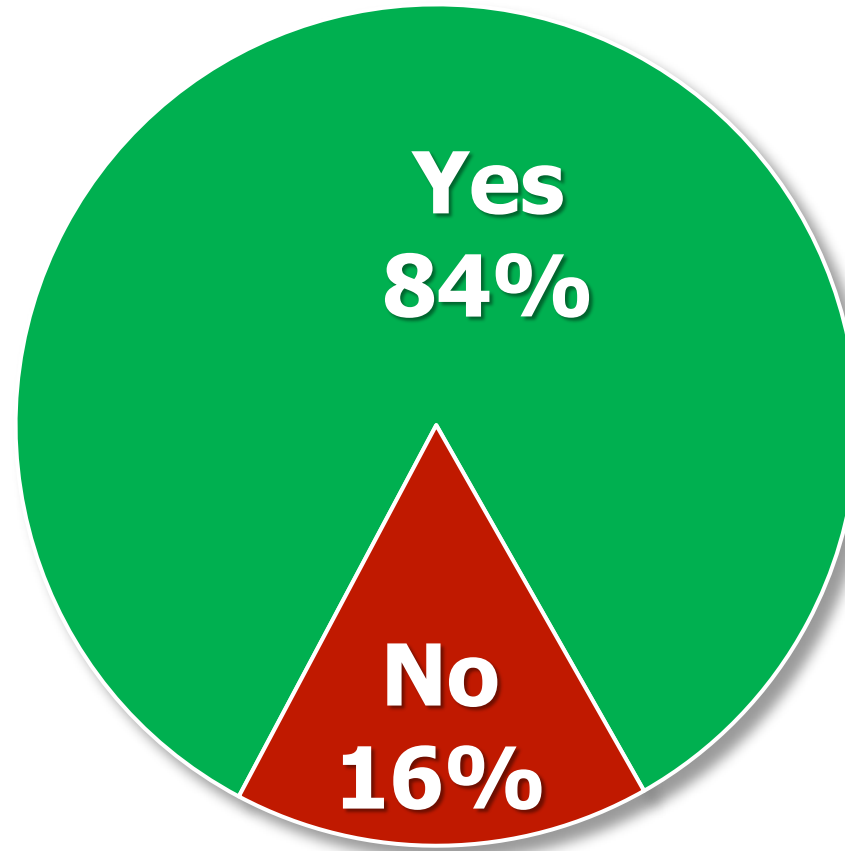


Source: GfK TVB Purchase Funnel 2024 A18+

QA10 “When doing an online search, how often, if at all, have TV advertisements you have seen in this category influenced you in some way in your search selections?”
(Yes = Every time, most of the time, sometimes among those who do online searches).

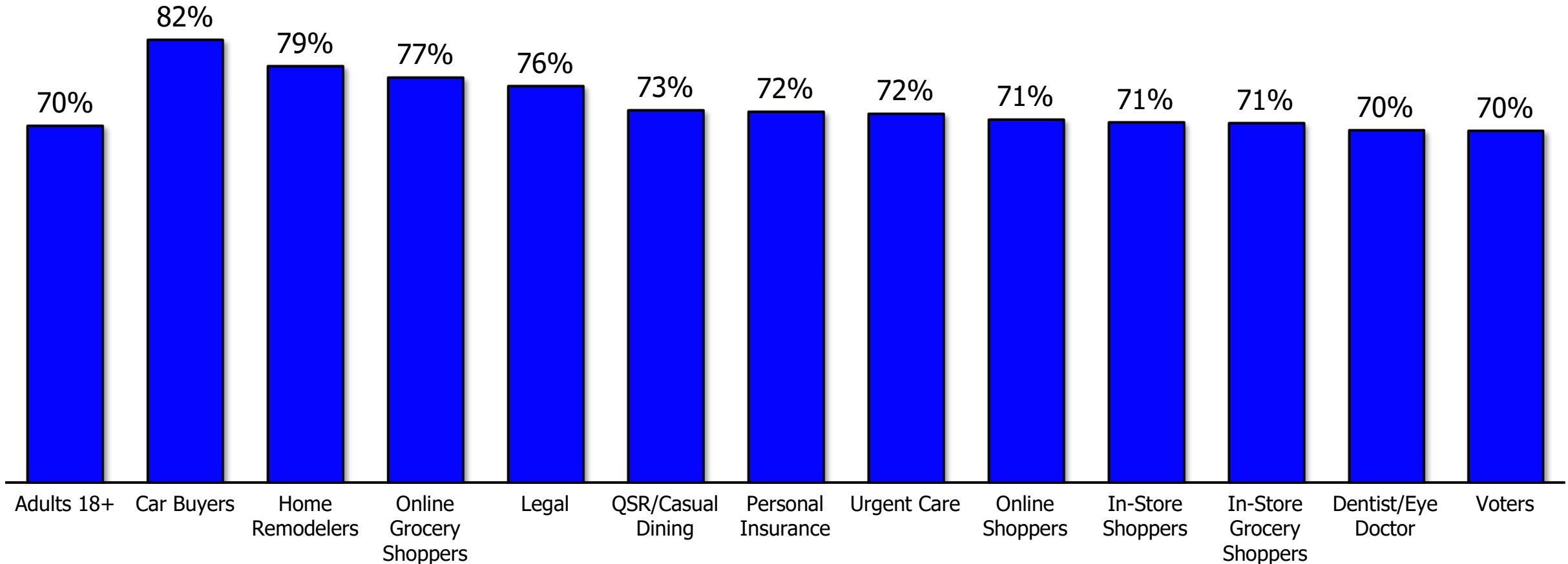
“When visiting a television station’s website or app, do you view the ads?”

% A18+



“When visiting a local television station’s website/apps, do you look at the video ads?”

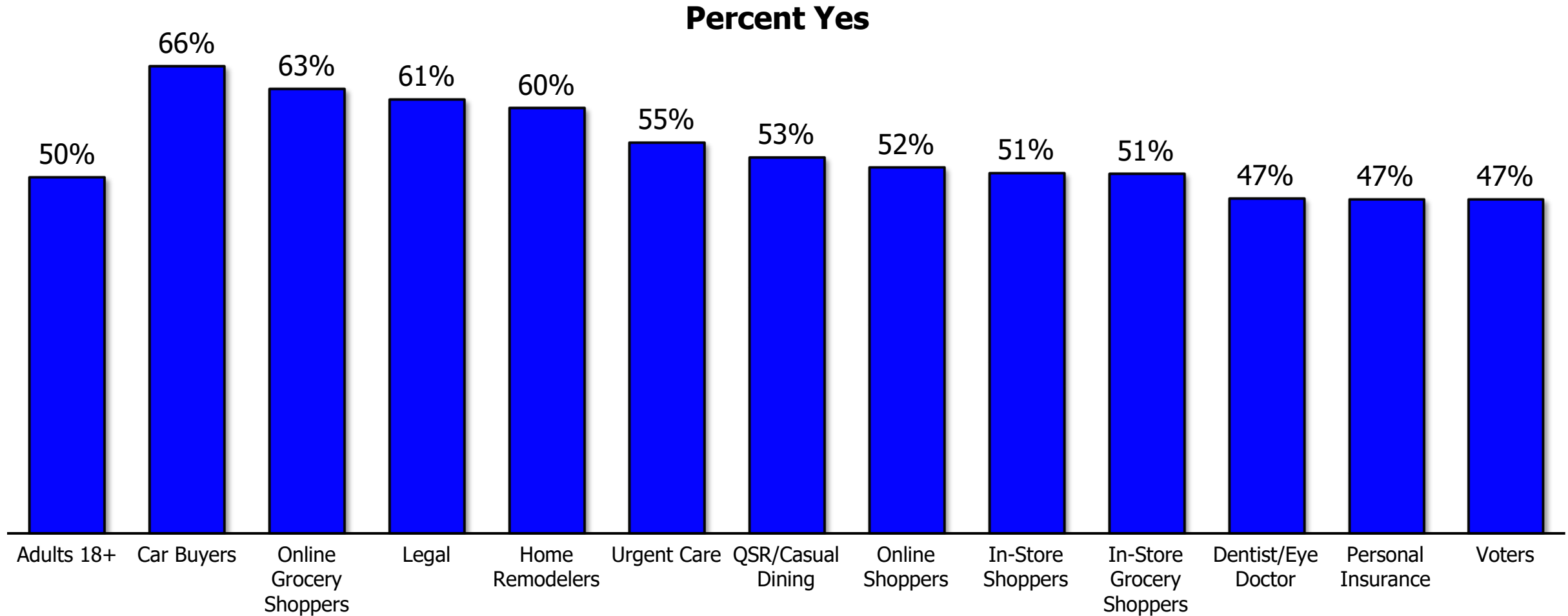
Percent Yes



Source: GfK TVB Media Comparisons Study 2024.

QO12 - And, when visiting a local television station’s website/apps, how often do you look at the video ads? Of those who go to a local station’s website or app. Includes only those who answered every time, most of the time, or sometimes.

“Have you read or watched local broadcast TV station content on a social media site?”



Source: GfK TVB Media Comparisons Study 2024. Includes only those who answered all of the time, often, or sometimes.
QO10 - Have you ever read or watched local broadcast TV station content on a social media site like Facebook, Twitter/X, Instagram, or TikTok?

In Summary

- **Broadcast TV** is where most “**Content**” comes from that consumers spend **Time** with and are **Influenced** by Today
- **Broadcast TV** drives consumer **Search** and ultimately **Purchases**
- **Broadcast TV** has significantly more **Reach** than Streaming
- **Broadcast TV** and its **Digital** properties are the most **Trusted** consumer **Influencers** available today



Thank You

Brian Wexler
SVP, Business Development, TVB



