

Happy Mother's Day

2024

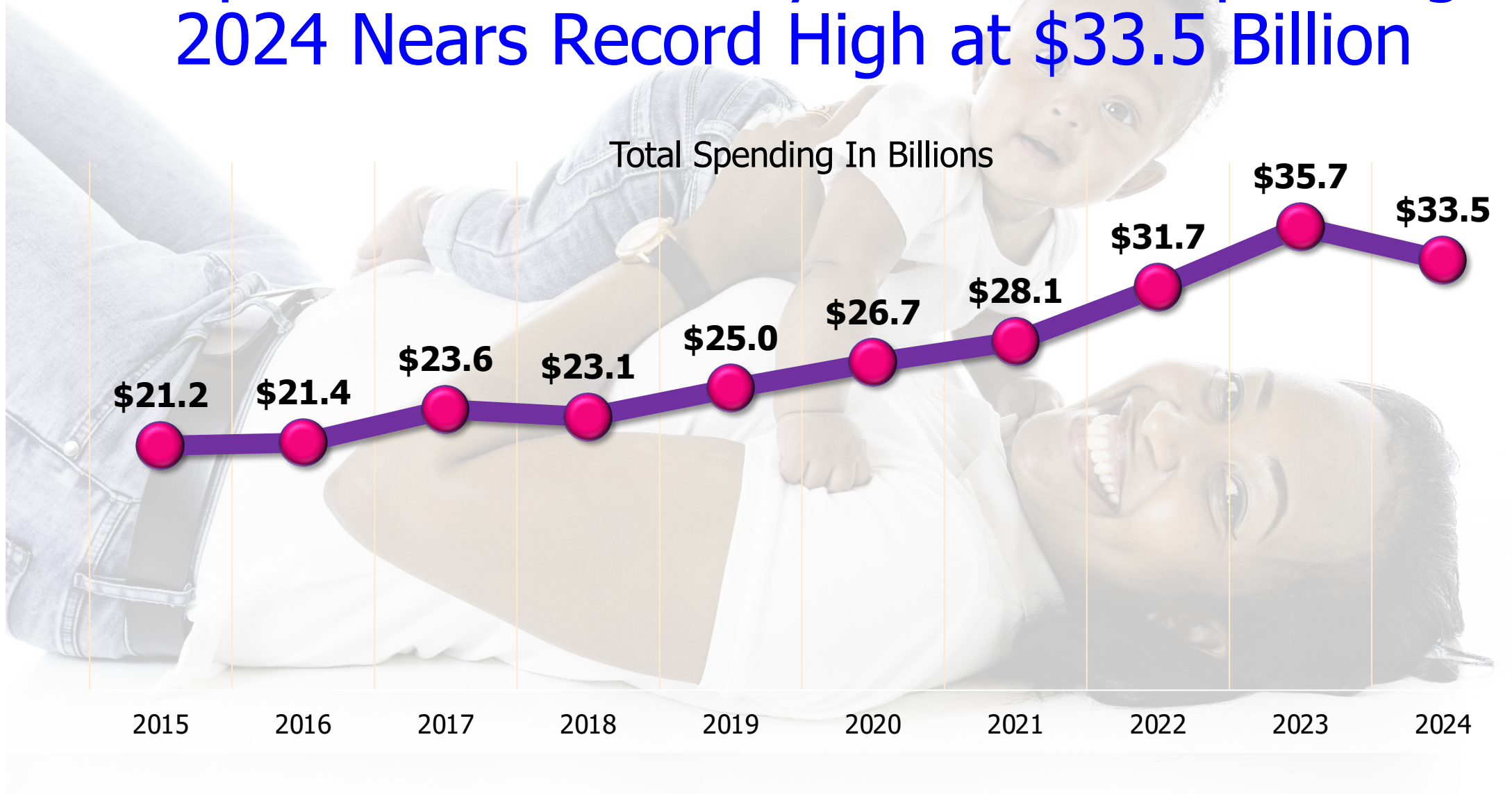


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- Linear TV/Streaming It's Not an Either/Or It's an AND ([Slides 45-50](#))
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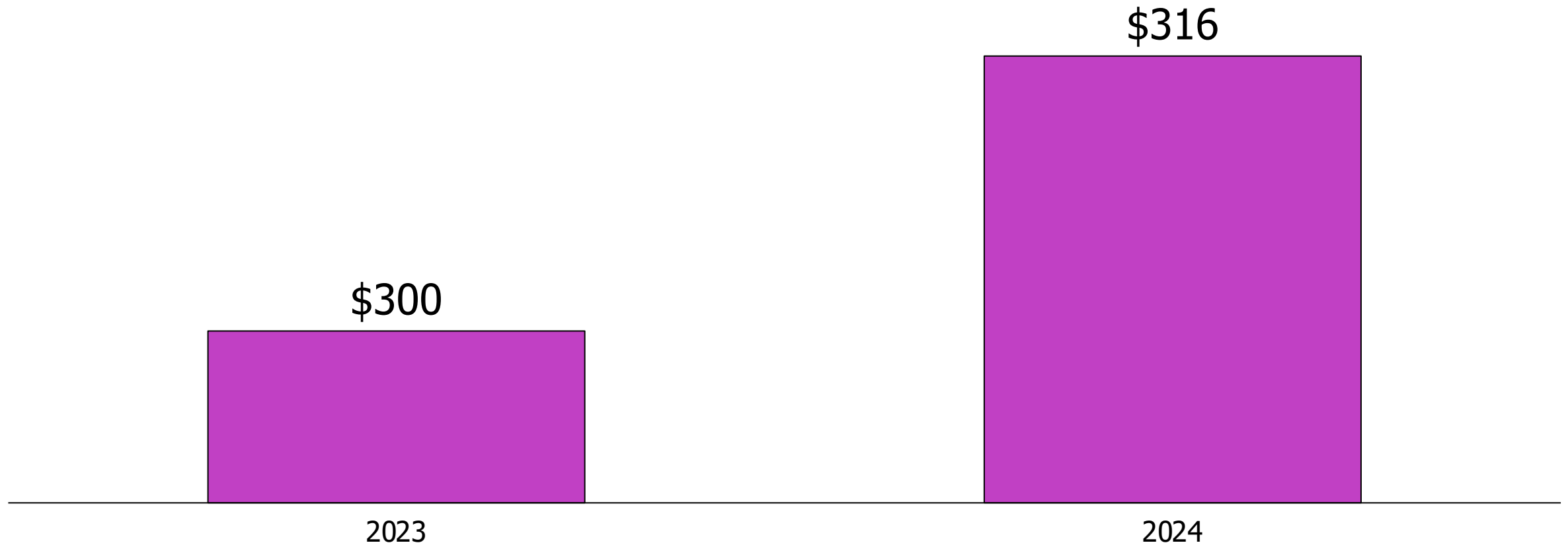
Mother's Day 2024 Spending

Anticipated Mother's Day Consumer Spending in 2024 Nears Record High at \$33.5 Billion



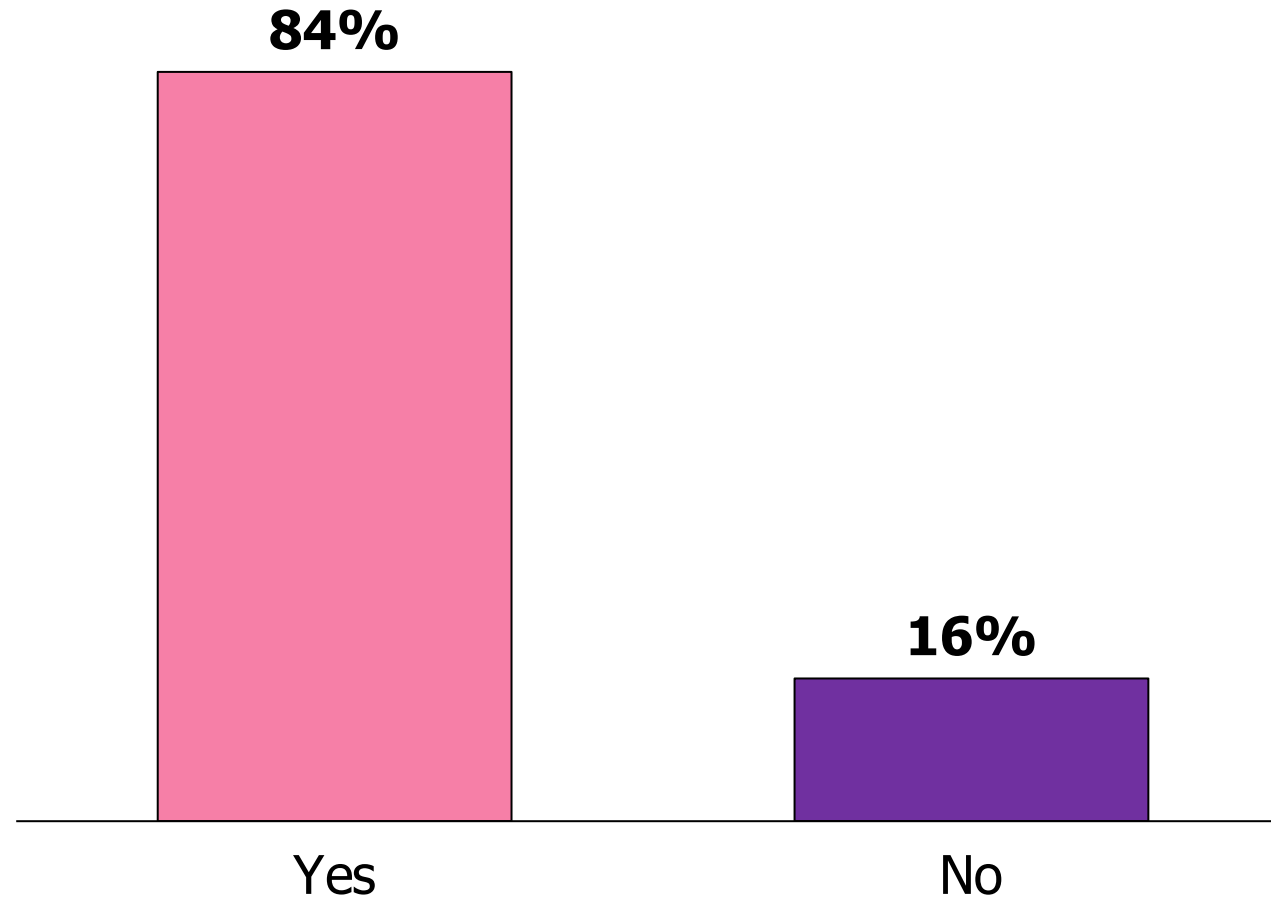
Mother's Day Spending Is Up This Year

Average Spending Per Person



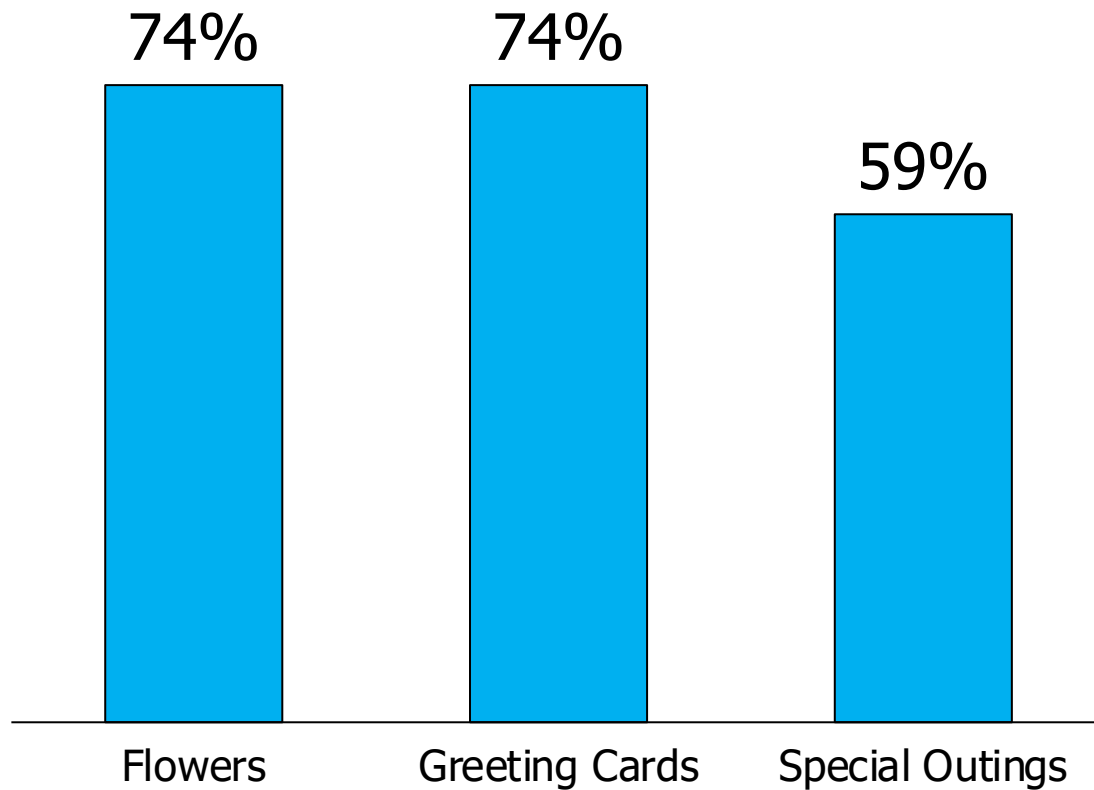
84% of Americans Will Celebrate Mother's Day

Percent That Plan To Celebrate Mother's Day

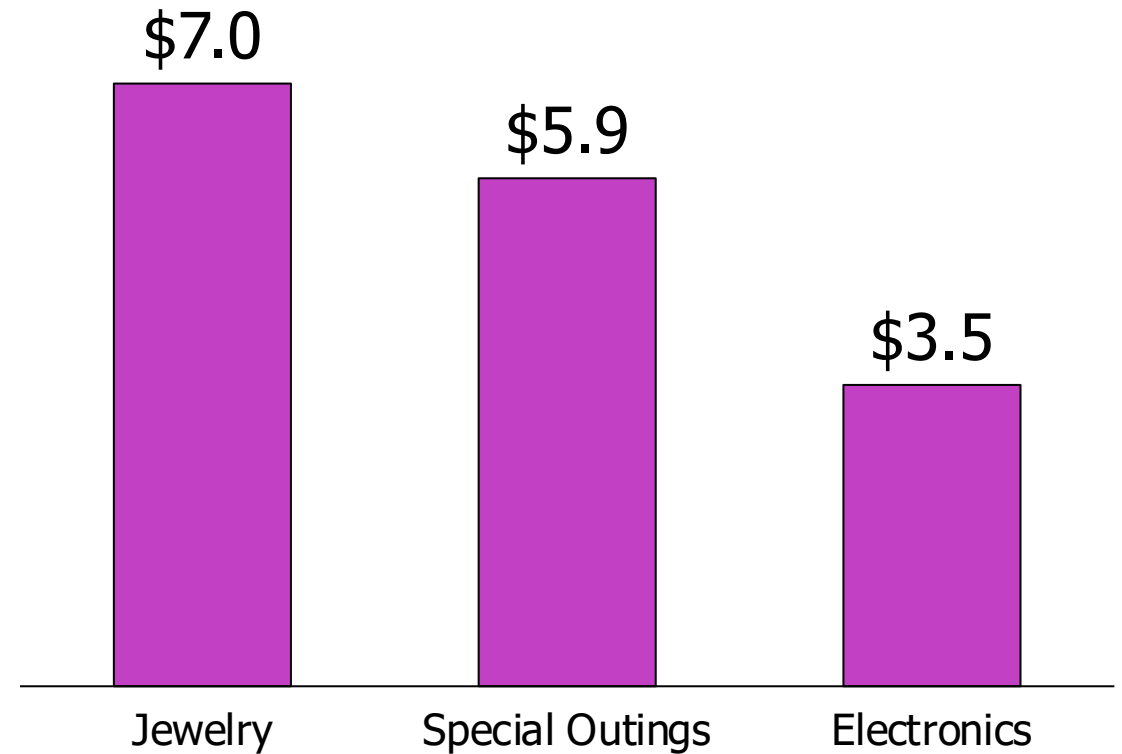


Mother's Day Top Gift Categories

**Top 3 Gift Categories
(%)**

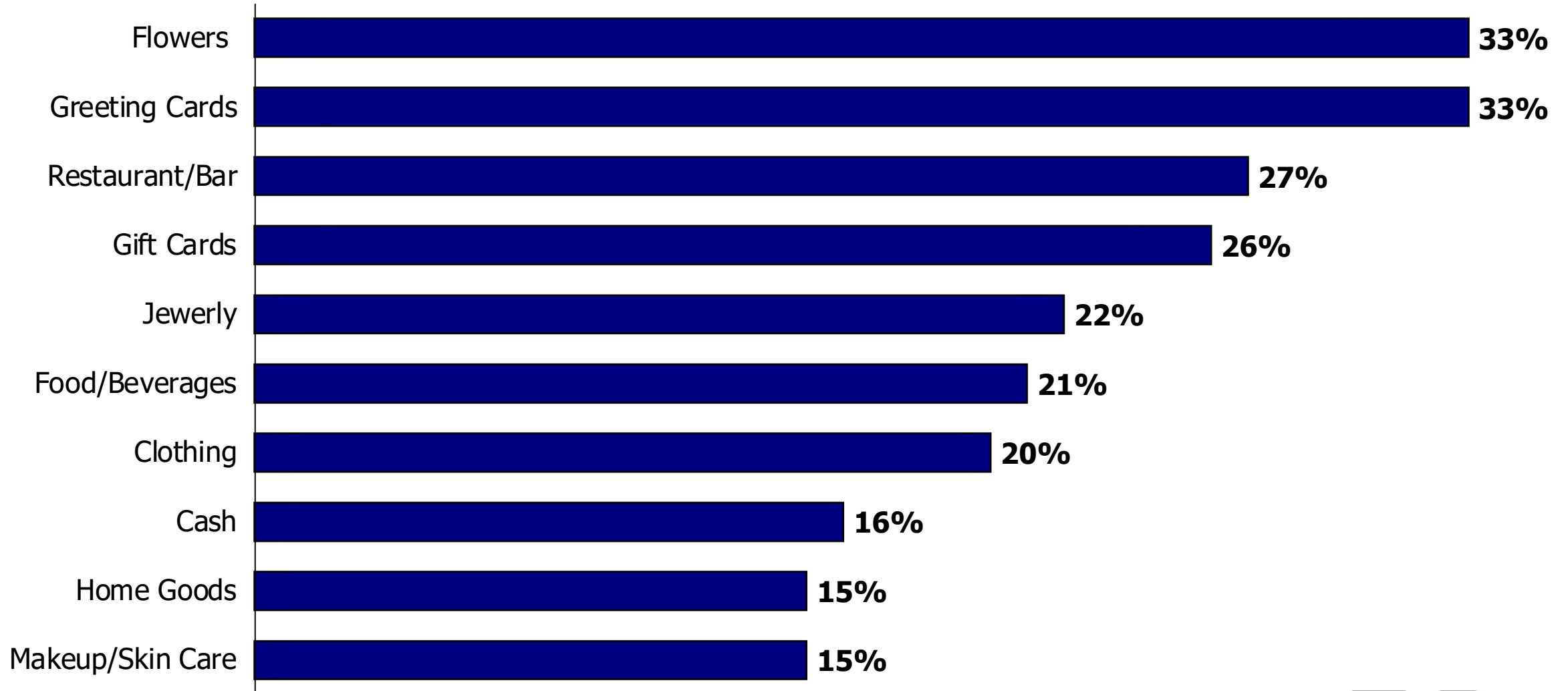


**Top 3 Gift Categories
By Spend (in billions)**



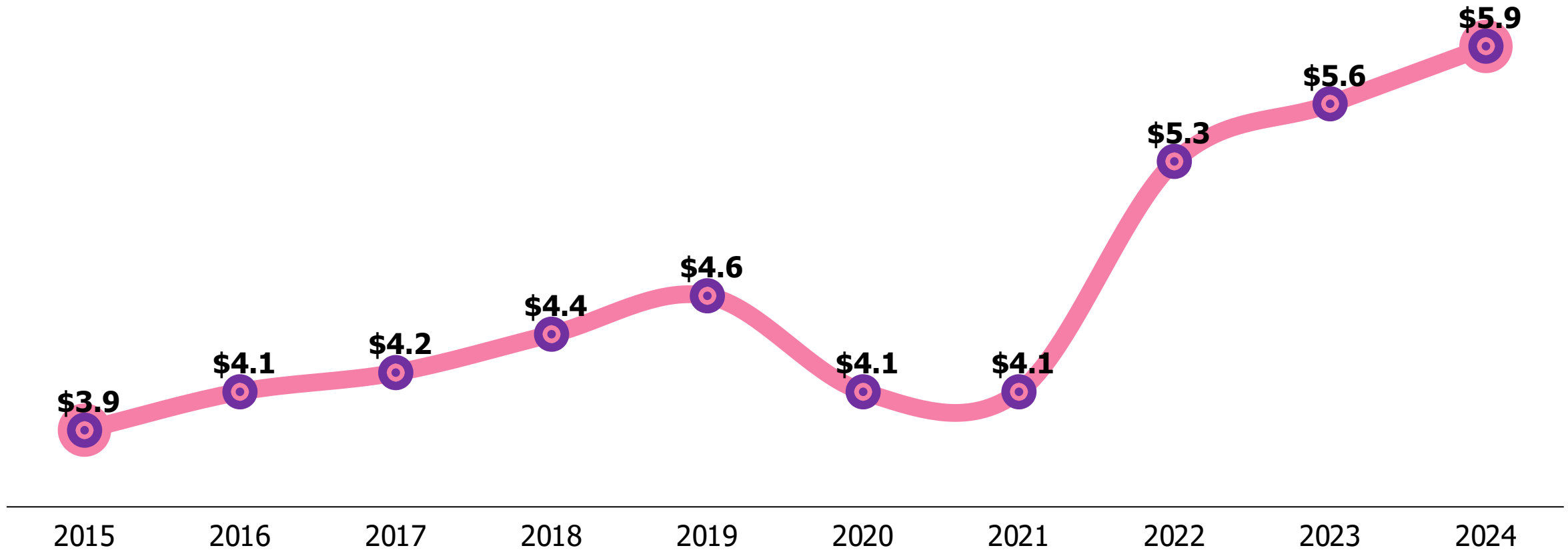
Top Mother's Day Gifts For 2024

Mother's Day Shoppers Spend An Average Of \$316.87



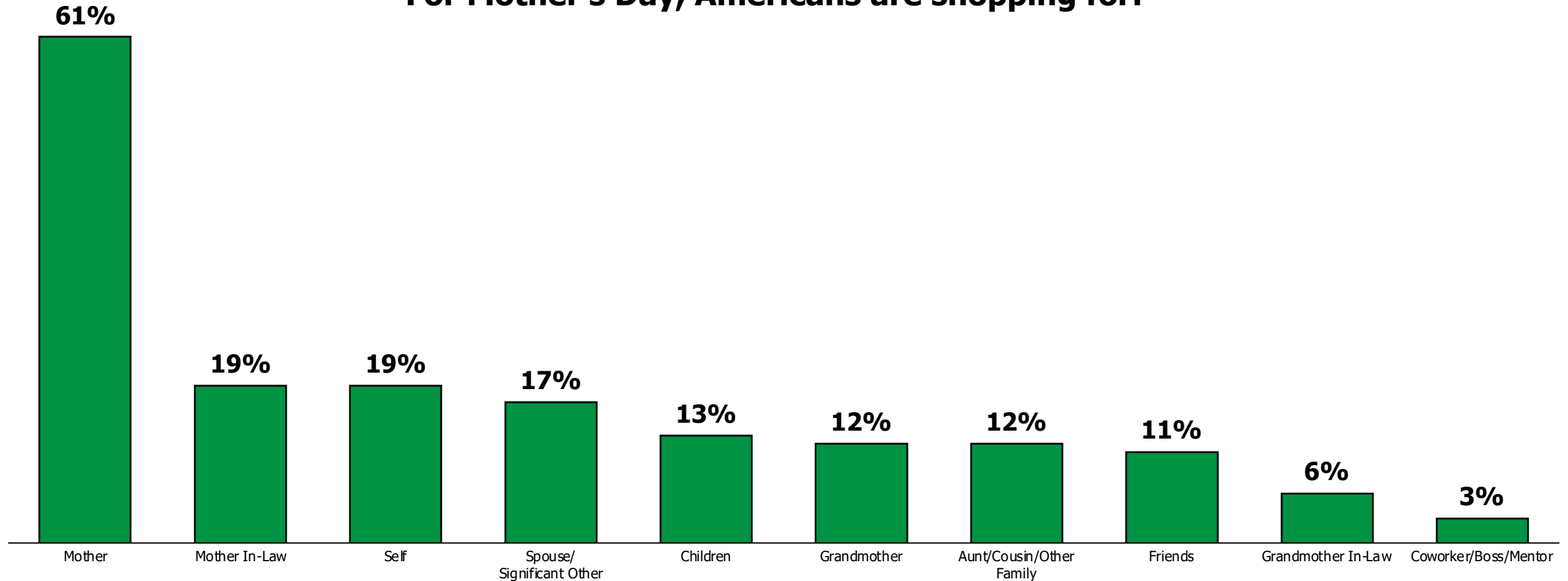
Consumers Plan to Spend More on Special Outings Than Ever Before in 2024

Total Spending in Billions on Special Outings



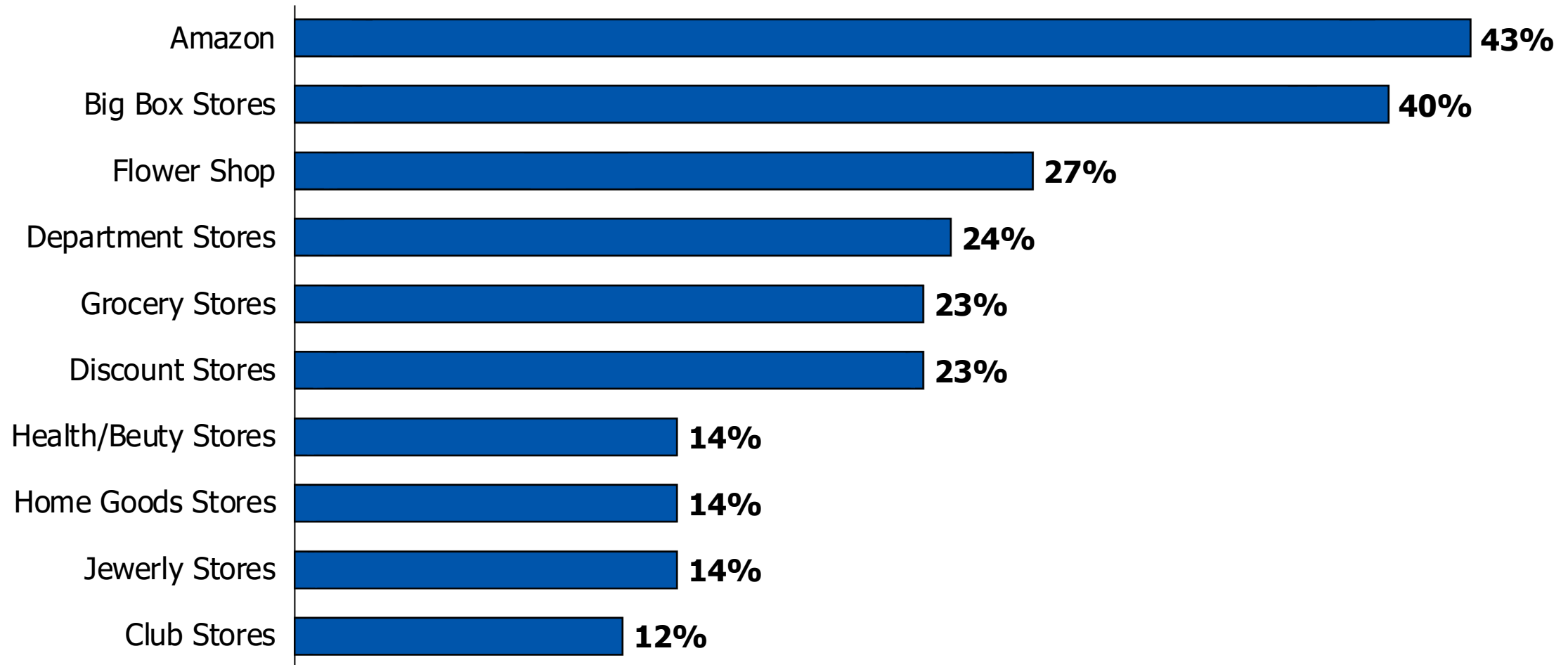
Mothers Are The Top Recipients for Mother's Day Gifts

For Mother's Day, Americans are shopping for:



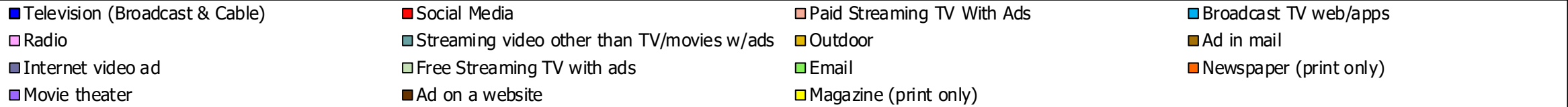
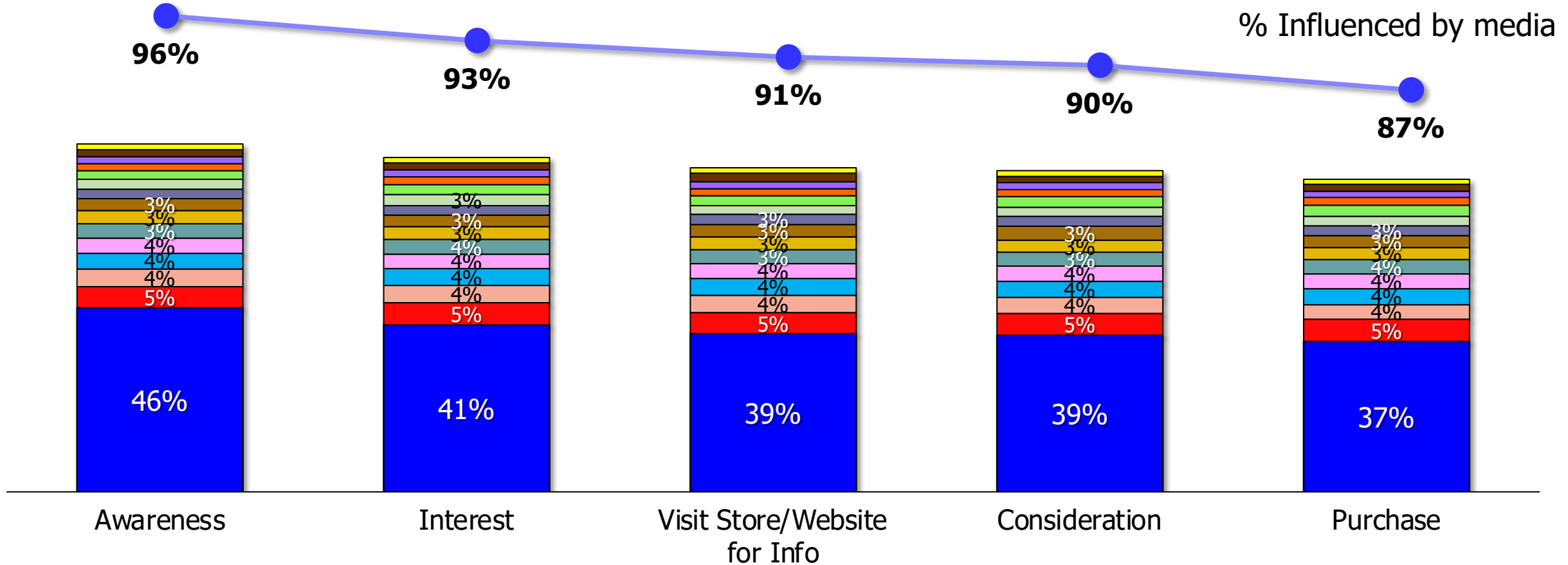
Amazon and Big Box Stores Are Top Shopping Destinations for Mother's Day Gifts

Where Do You Plan To Shop For Mother's Day?



TV Advertising Is Imperative To Influence Mother's Day Shoppers

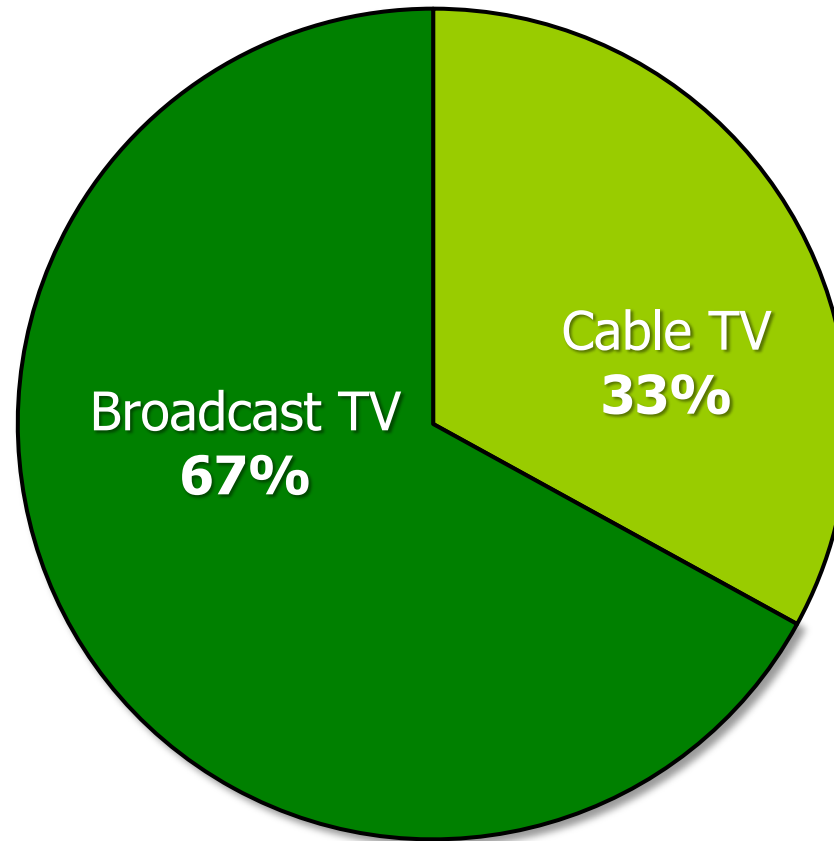
What Influenced Consumers Most: Television



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

Of Those that Cited TV as the Most Important in Awareness Phase, Two-Thirds Picked Broadcast TV

All 8 Categories:



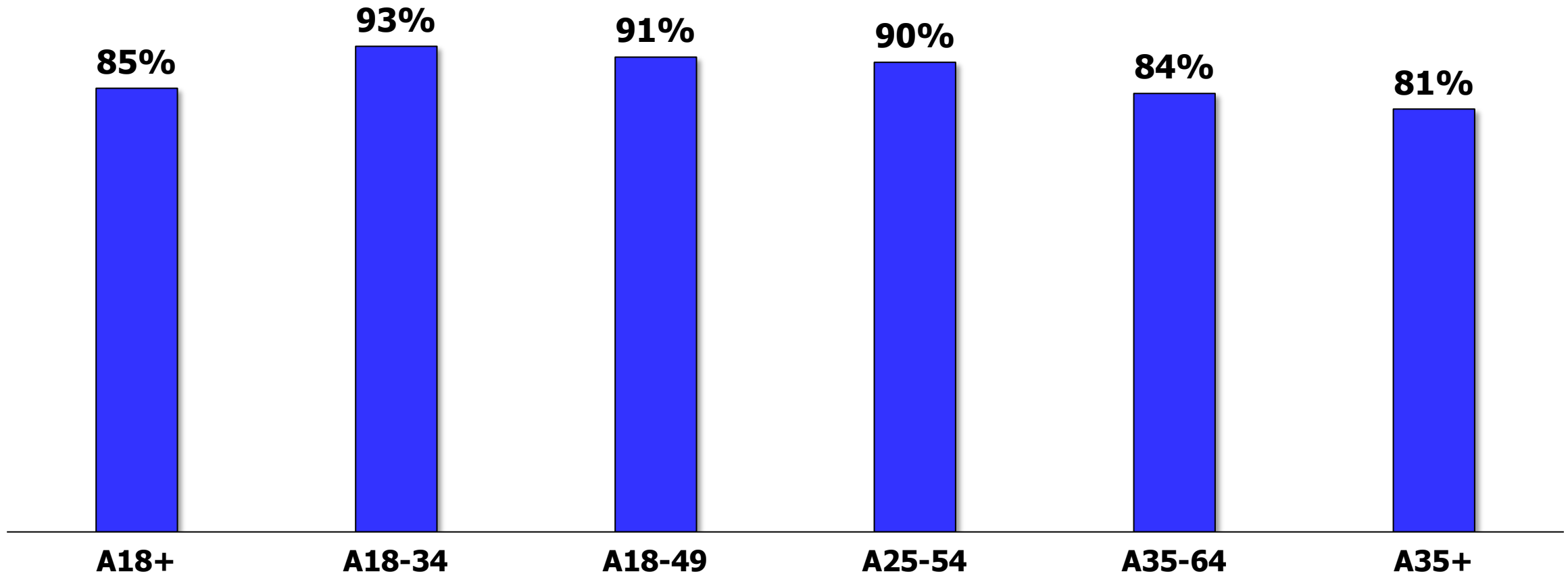
Source: GfK TVB Purchase Funnel 2024 A18+

QA4 "Thinking about the ads you saw/heard for the categories, which advertising media made you most aware of the category?"

How to read: Of the 46% who chose television as most important, 67% chose broadcast TV

"Have TV ads influenced your search selections?"

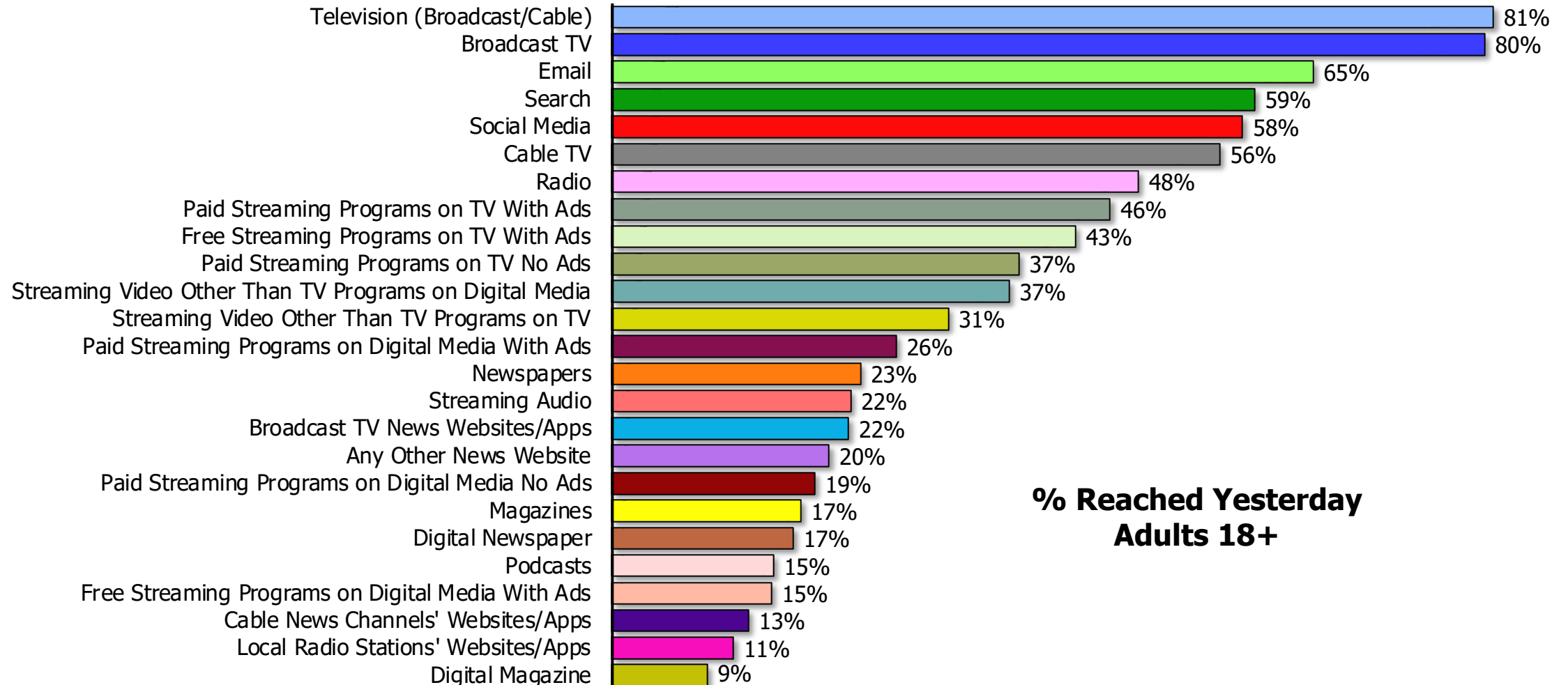
"Yes" Among Those Who Do Online Searches



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.

TV Has Highest Reach of All Platforms Measured

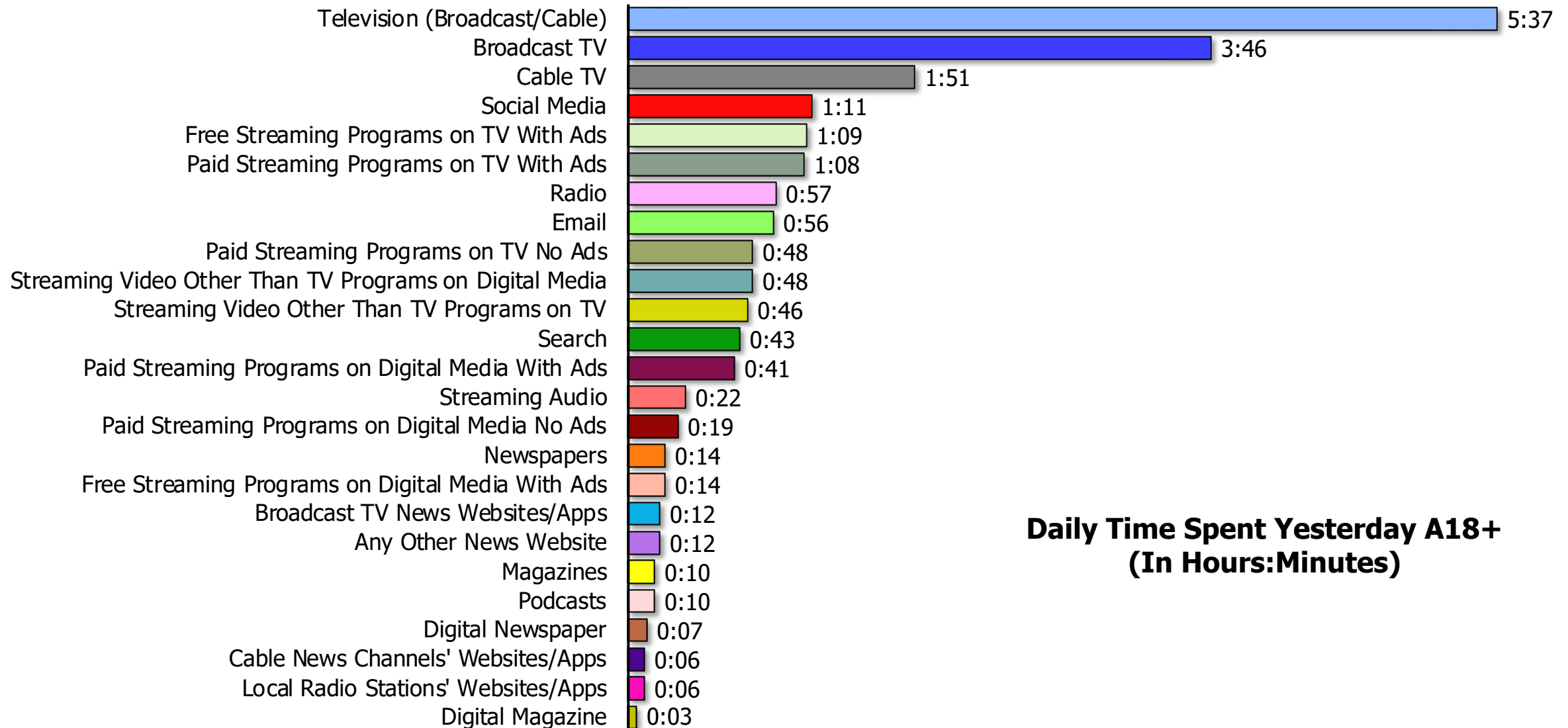
Broadcast Leads the Way



**% Reached Yesterday
Adults 18+**

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.

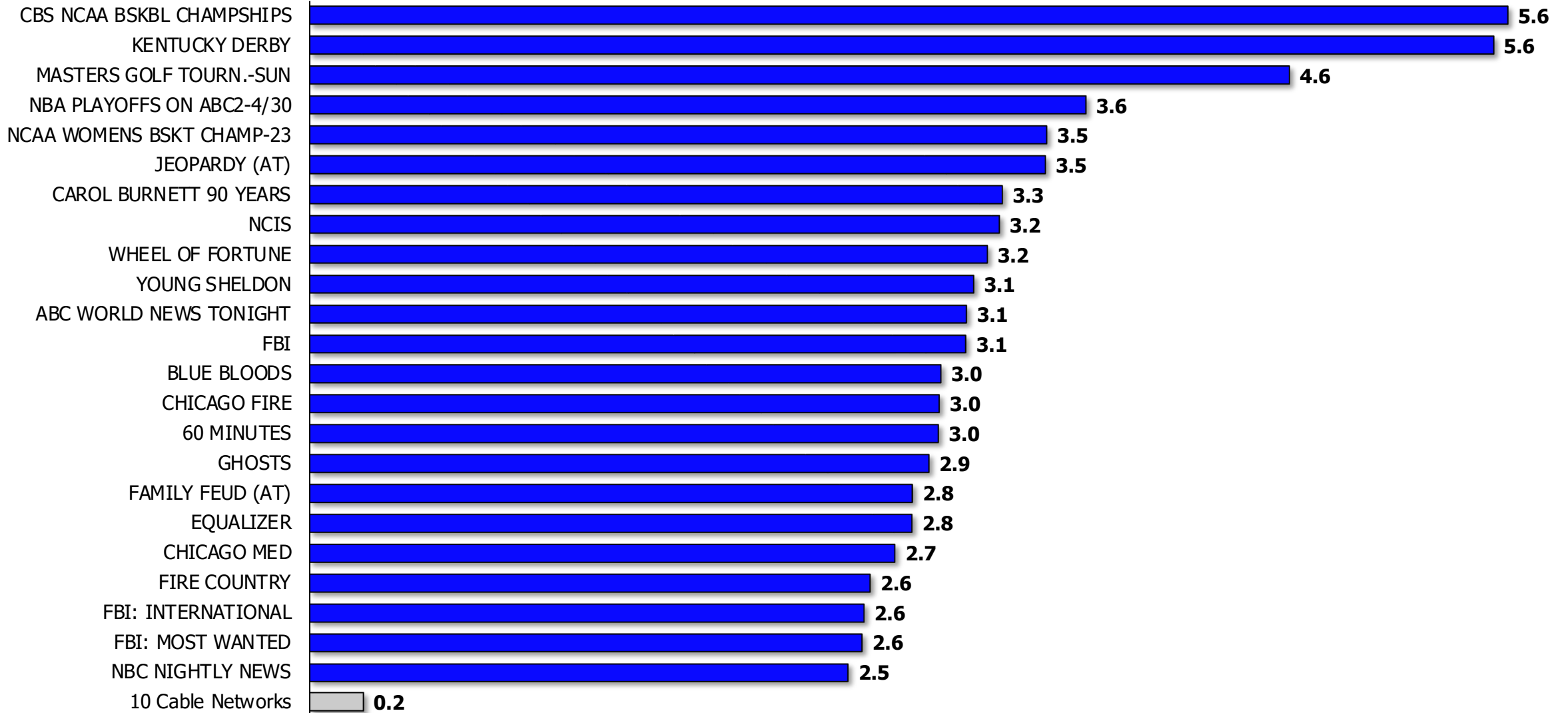
People Spend the Most Time with Television



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

Broadcast Delivers Top Rated Programs

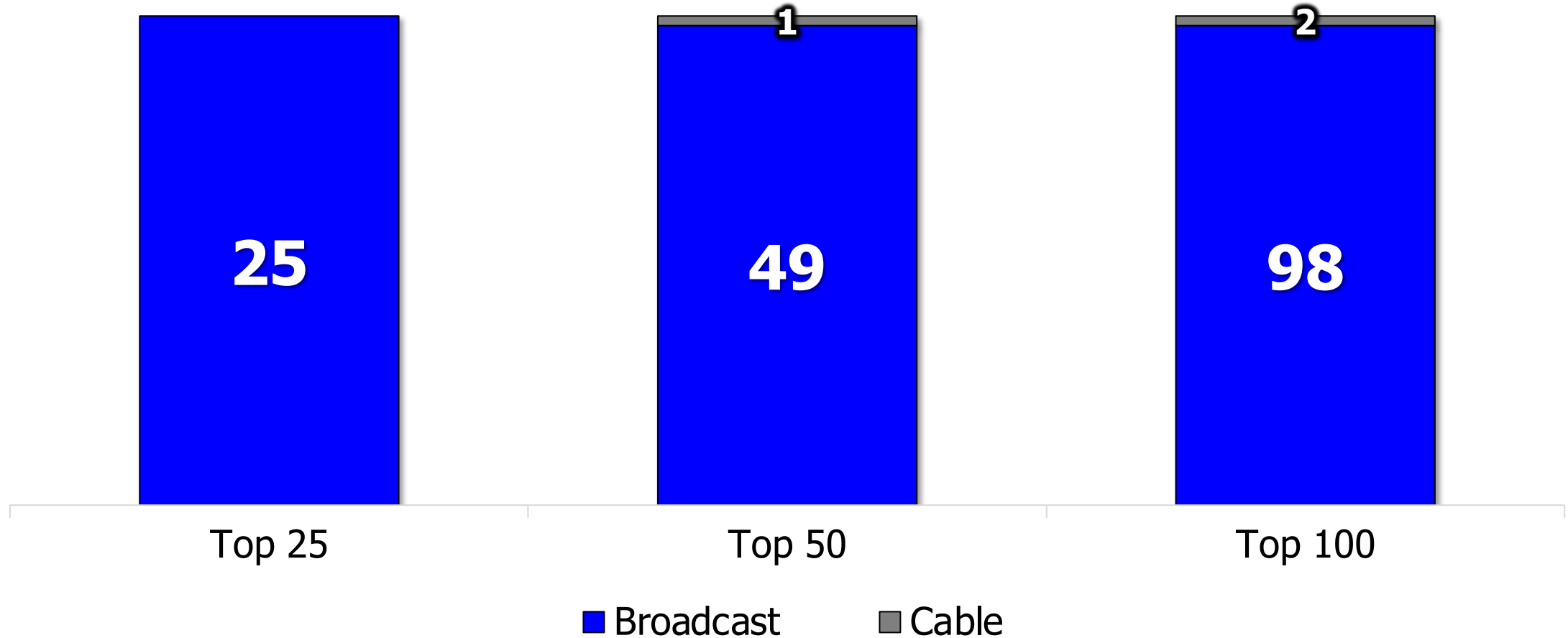
Adults 18+ Live+1 Ratings



Source: Nielsen NPower 3/27/2023-5/14/2023 Adults 18+ Live+1 Ratings; Broadcast Includes all Networks and Syndication.
10 Cable Networks based on A18+ Ratings.

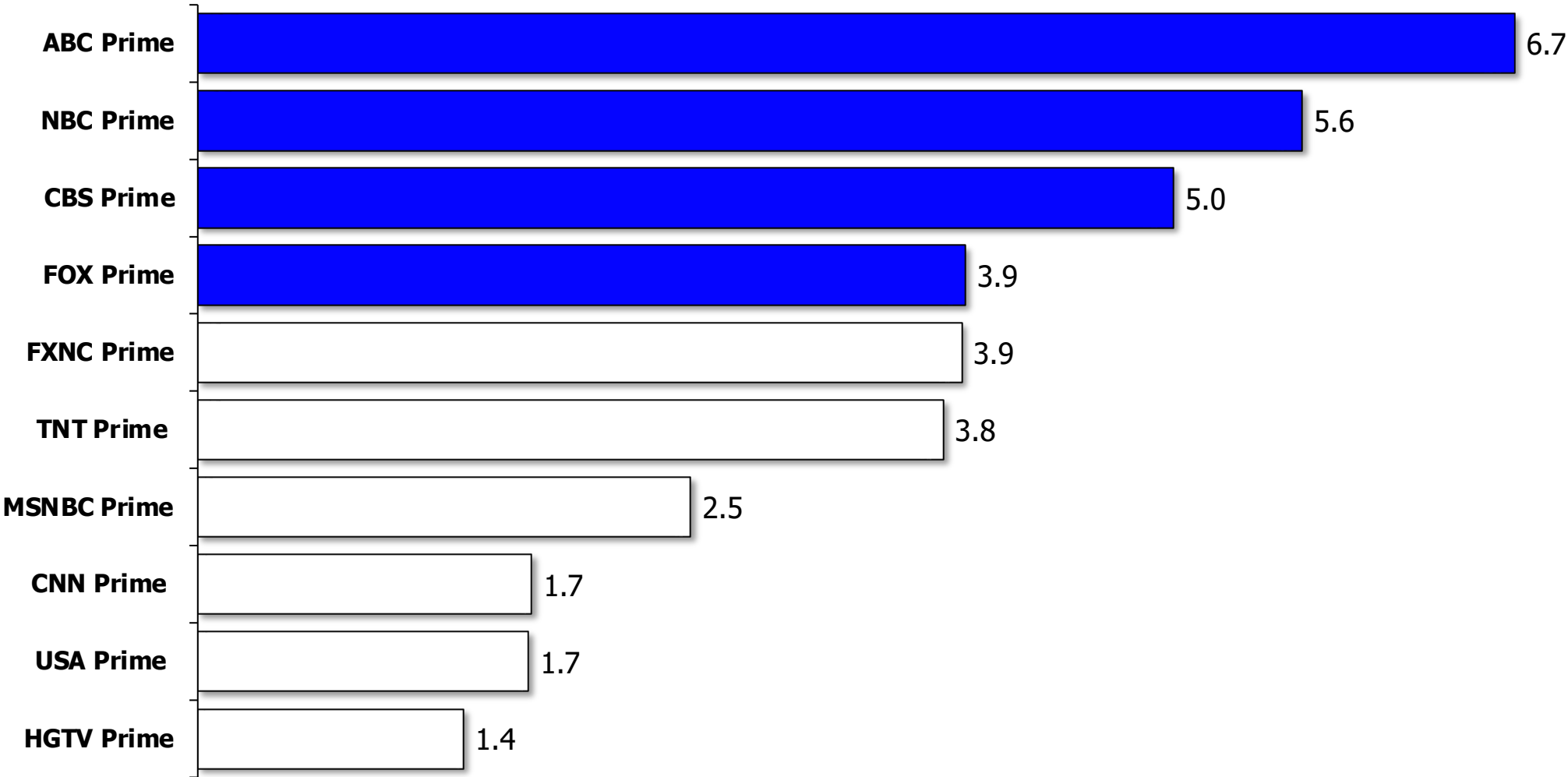
Broadcast TV Dominated the Top-Rated Programs

Of Top Rated Programs



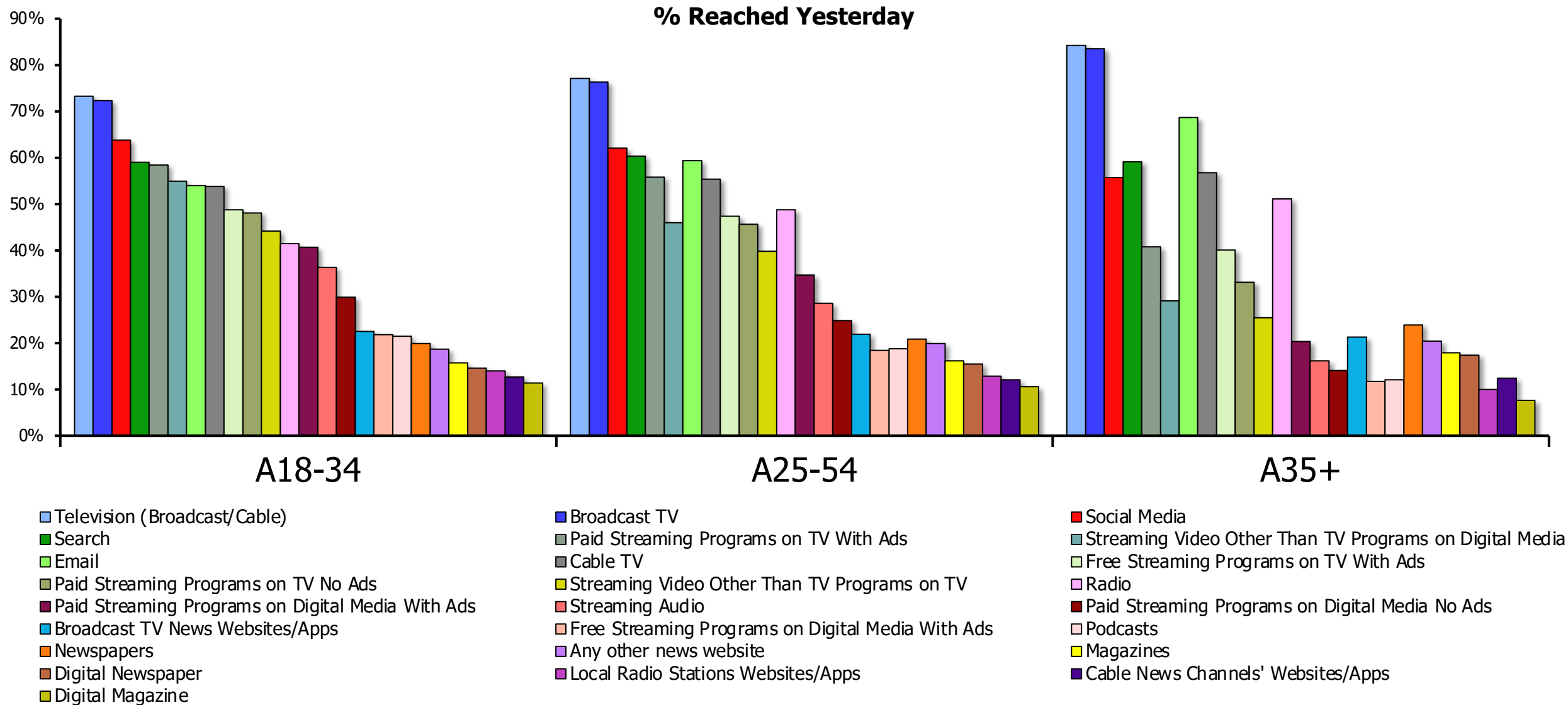
Broadcast TV's Reach: Significantly Higher Than Cable

A18+ One Day Prime Reach



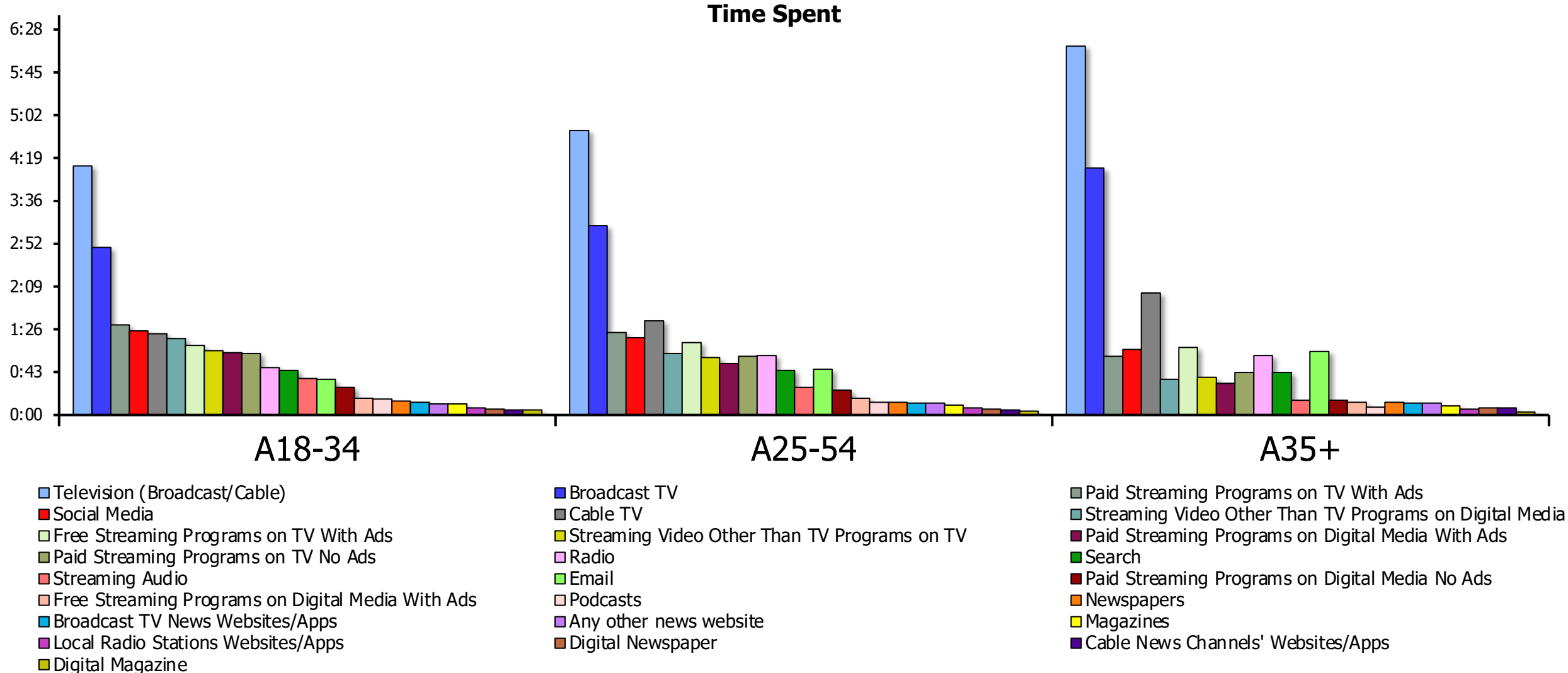
Source: Nielsen NPower. April 24, 2023. Prime A18+ Live+1 Ratings.

TV Has The Highest Reach for All Ages



Source: GfK TVB Media Comparisons Study 2024. M-S 4A-2A. 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.

The Difference in Time Spent for TV Versus Other Media is Dramatic, for All Age Groups

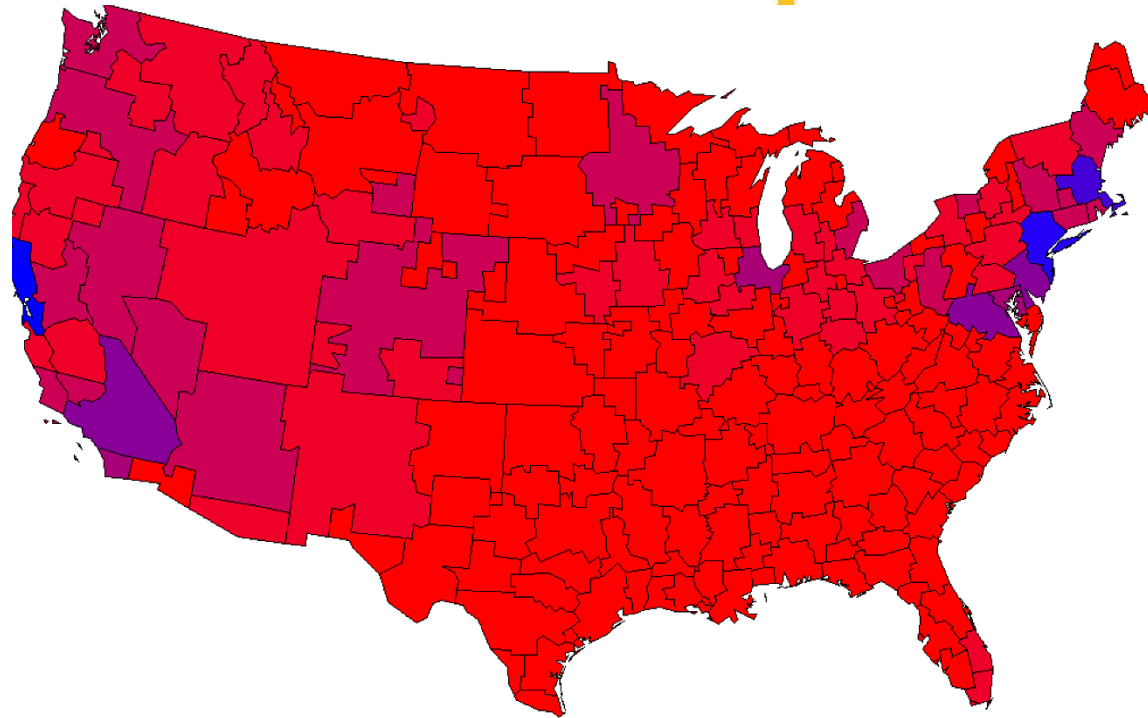


Source: GfK TVB Media Comparisons Study 2024. M-S 4A-2A. Online/internet platforms such as email, social media, internet radio and websites, are totaled for any online device-PC, Smartphone and Tablets. Broadcast TV News Websites/Apps includes local TV station & network websites/apps for news/weather/sports.

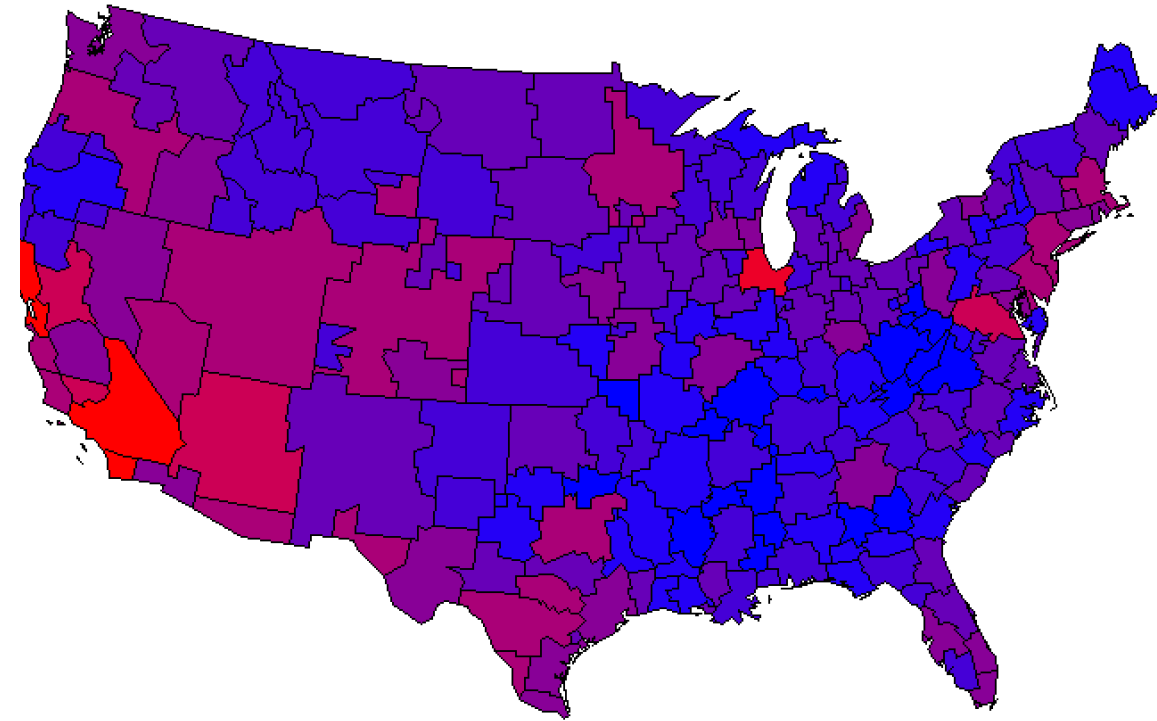
Local TV Allows Advertisers to Target their Message in a Trusted Environment

One Size Does NOT Fit All. Local TV Recognizes Each Market's Uniqueness

Walmart 



 TARGET®



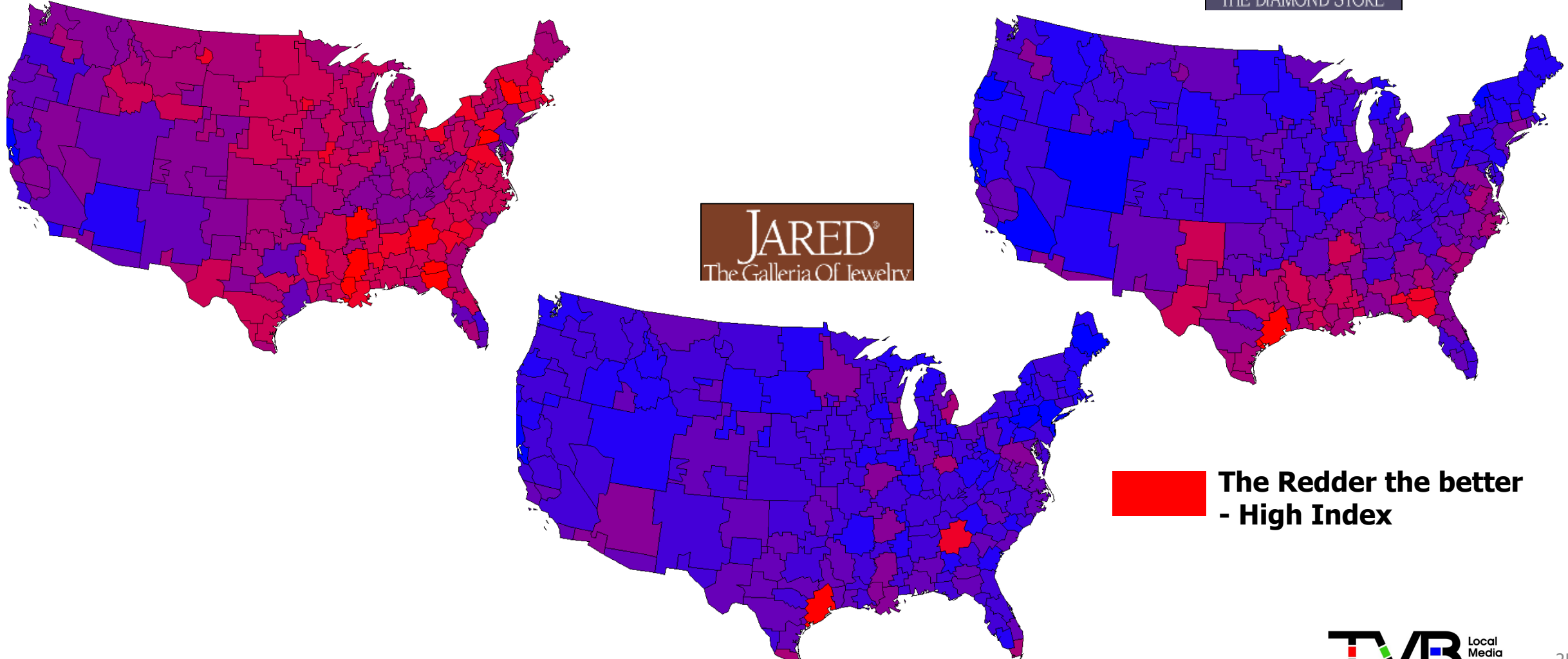
 The Redder the better- Higher the Sales Index

Jewelry Shopping is a Local Decision

KAY
JEWELERS

ZALES
THE DIAMOND STORE®

JARED®
The Galleria Of Jewelry

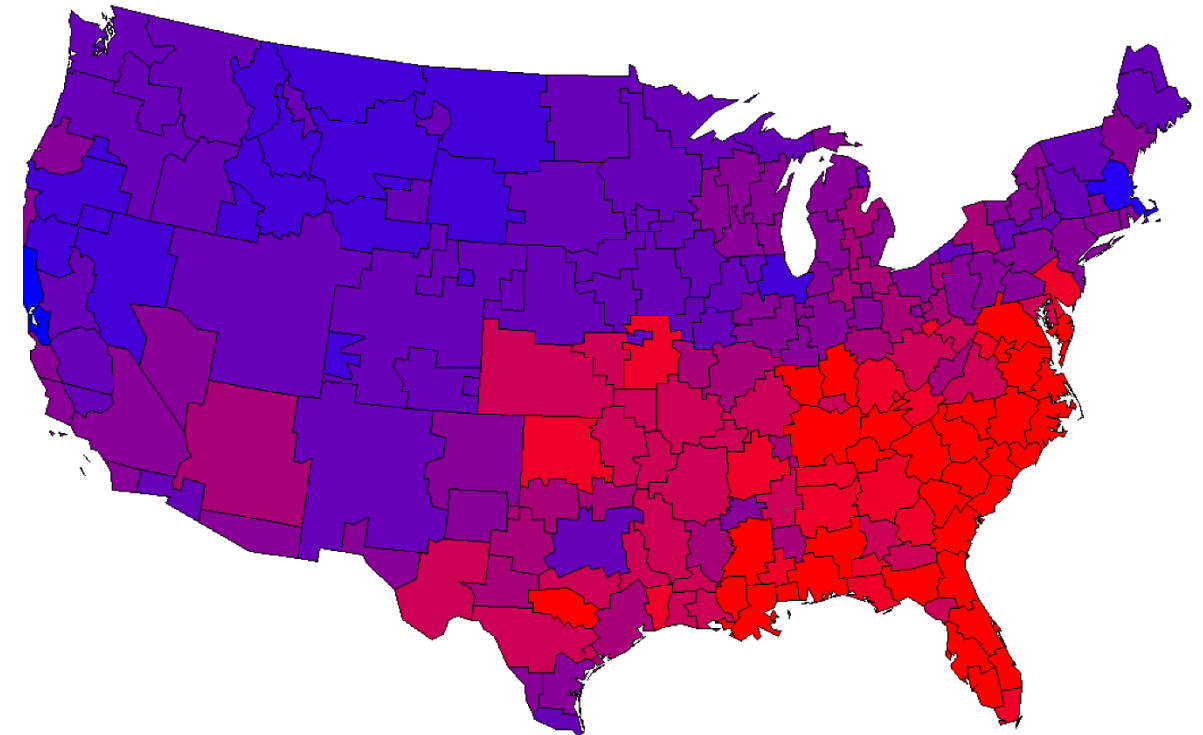
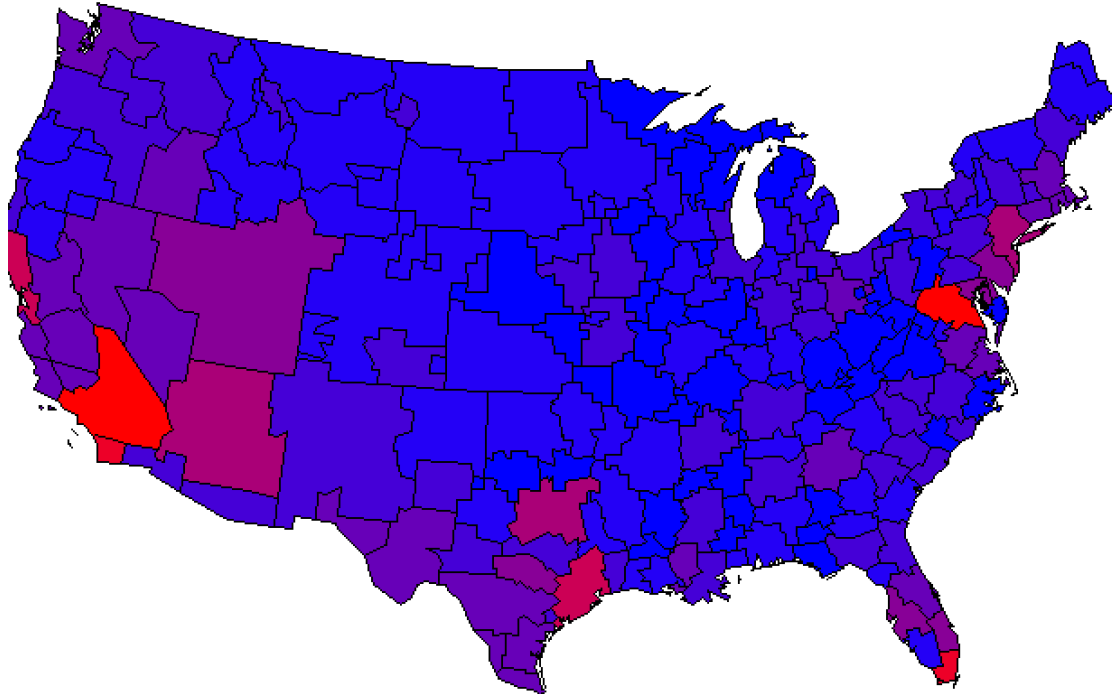


Source: MRI-Simmons 2023 Spring Market-by-Market weighted by Adult 18+ population. Purchased Fine Jewelry at Jared, Kay or Zales.

Target Adults Who Enjoy Dining Out With Local Broadcast

The
Cheesecake
Factory®

OUTBACK
STEAKHOUSE®

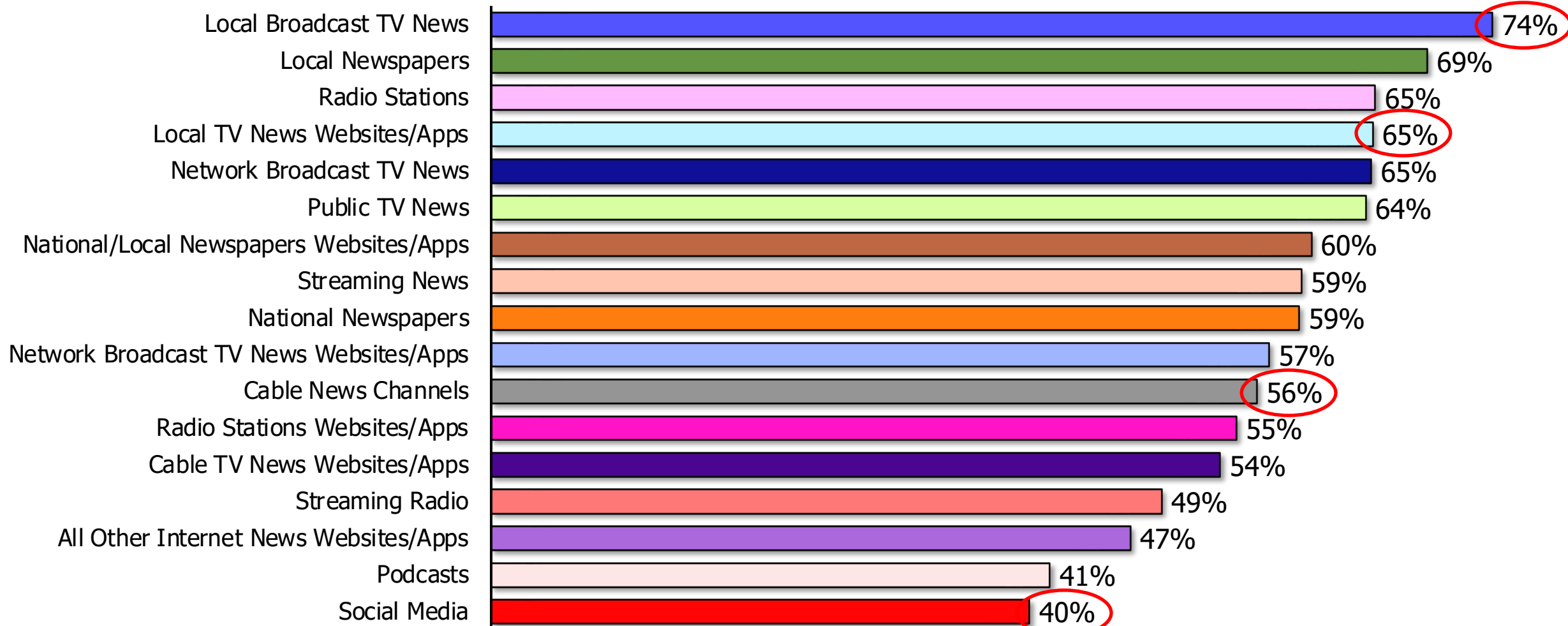


 The Redder the better - High Index

Source: MRI-Simmons 2023 Market-by-Market weighted by Adult 18+ population. Bought at in the last 6 months: The Cheesecake Factory, Outback Steakhouse.

Local Broadcast Television News: #1 For Trust

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

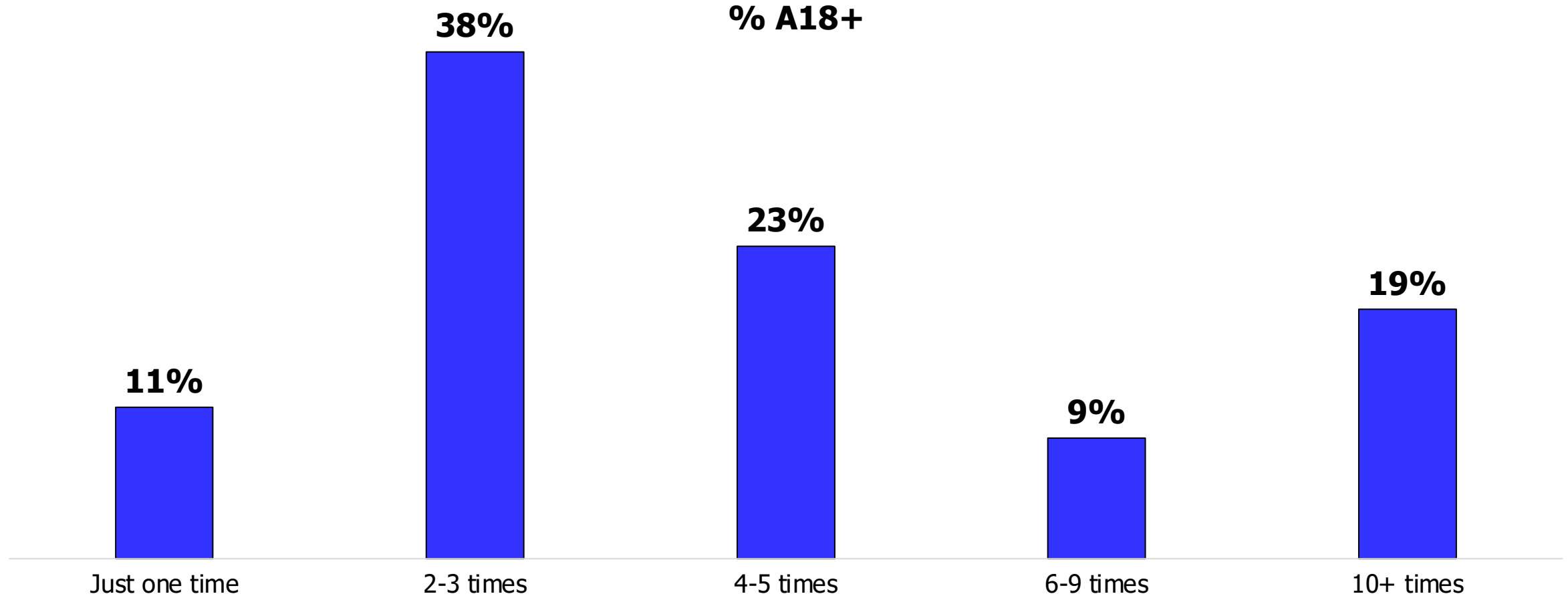


Source: GfK TVB Media Comparisons Study 2024. Persons 18+. Agree Strongly or Agree Somewhat.

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.

51% Of Respondents Were Exposed to TV Commercials 4+ Times



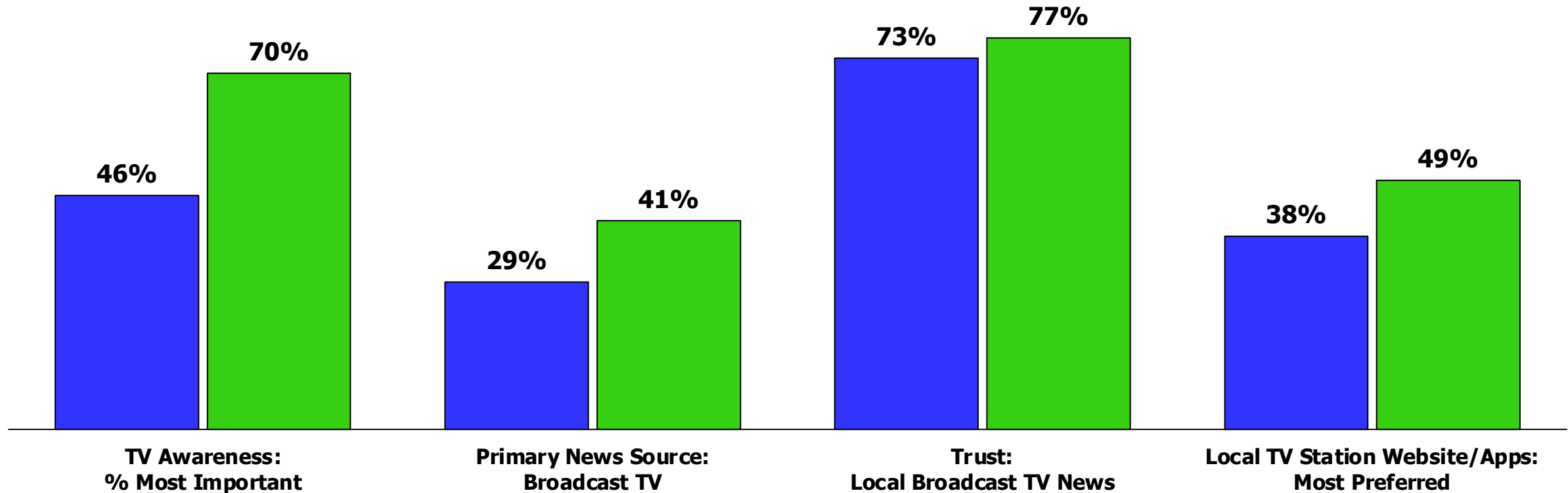
Source: GfK TVB Purchase Funnel 2024 A18+

QA1 "How many times do you estimate you saw a TV commercial for the category in the past month?" (auto, banking, furniture/bedding/carpet, legal, personal insurance, QSR, in-store retail, online retail)

More TV Exposure Increases Importance for Awareness, Trust, and Preference

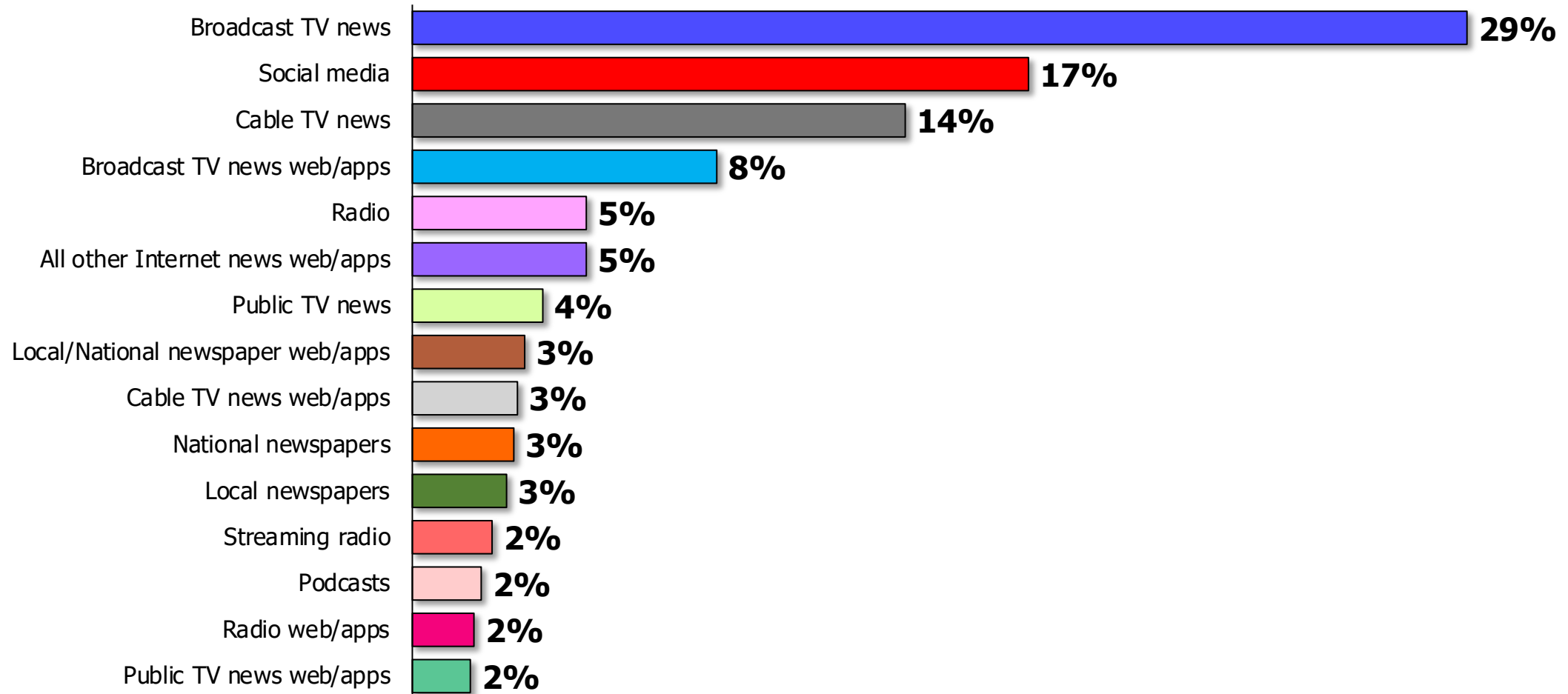
% A18+

■ All Respondents ■ Saw TV Ad 4+ Times



The Primary Source for News: Broadcast Television

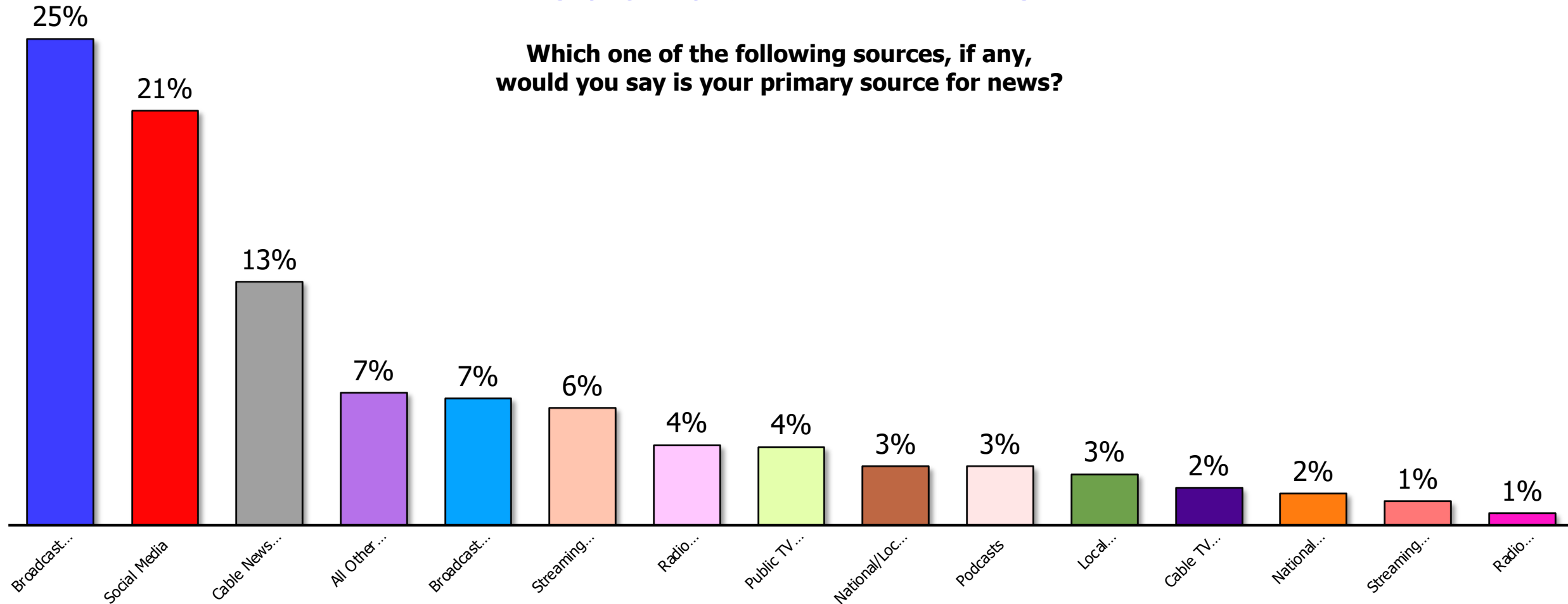
“Which of the following sources, if any, would you say is your primary source for news?”



Source: GfK TVB Purchase Funnel 2024 A18+

B1 “Which of the following sources, if any, would you say is your primary source of news?” Among those who chose a primary news source. Percentages are rounded.

The Primary Source For News: Broadcast Television



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

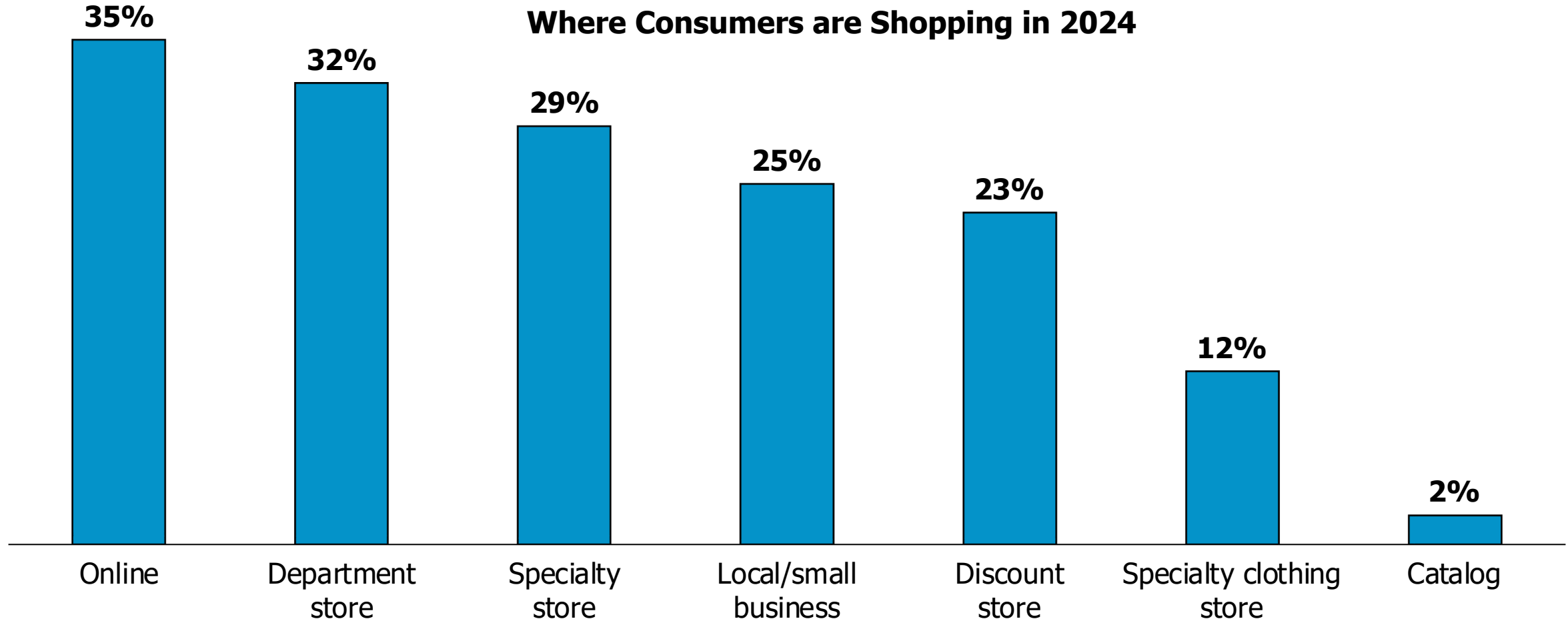
Q05 - Which one of the following sources, if any, would you say is your primary source for news?

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.

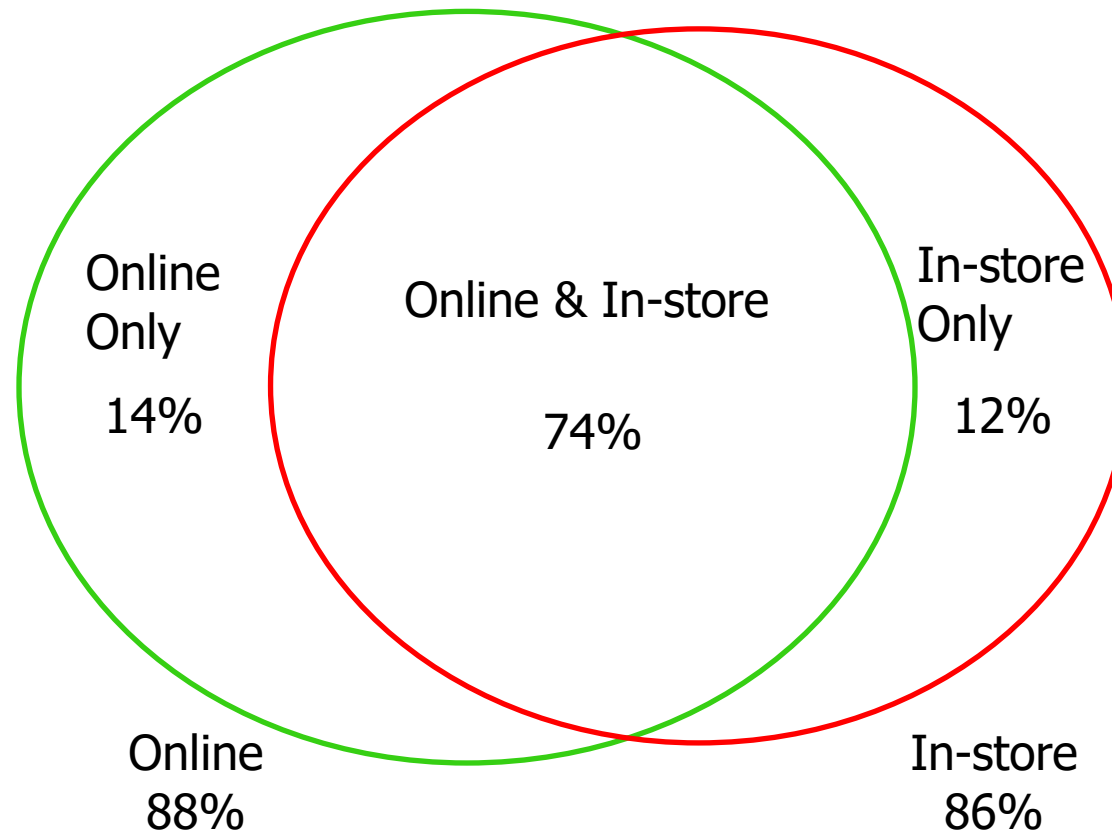
Regardless of How Consumers Shop, TV Advertising is Key

Online and Department Stores Are The Top Places To Shop for Mother's Day



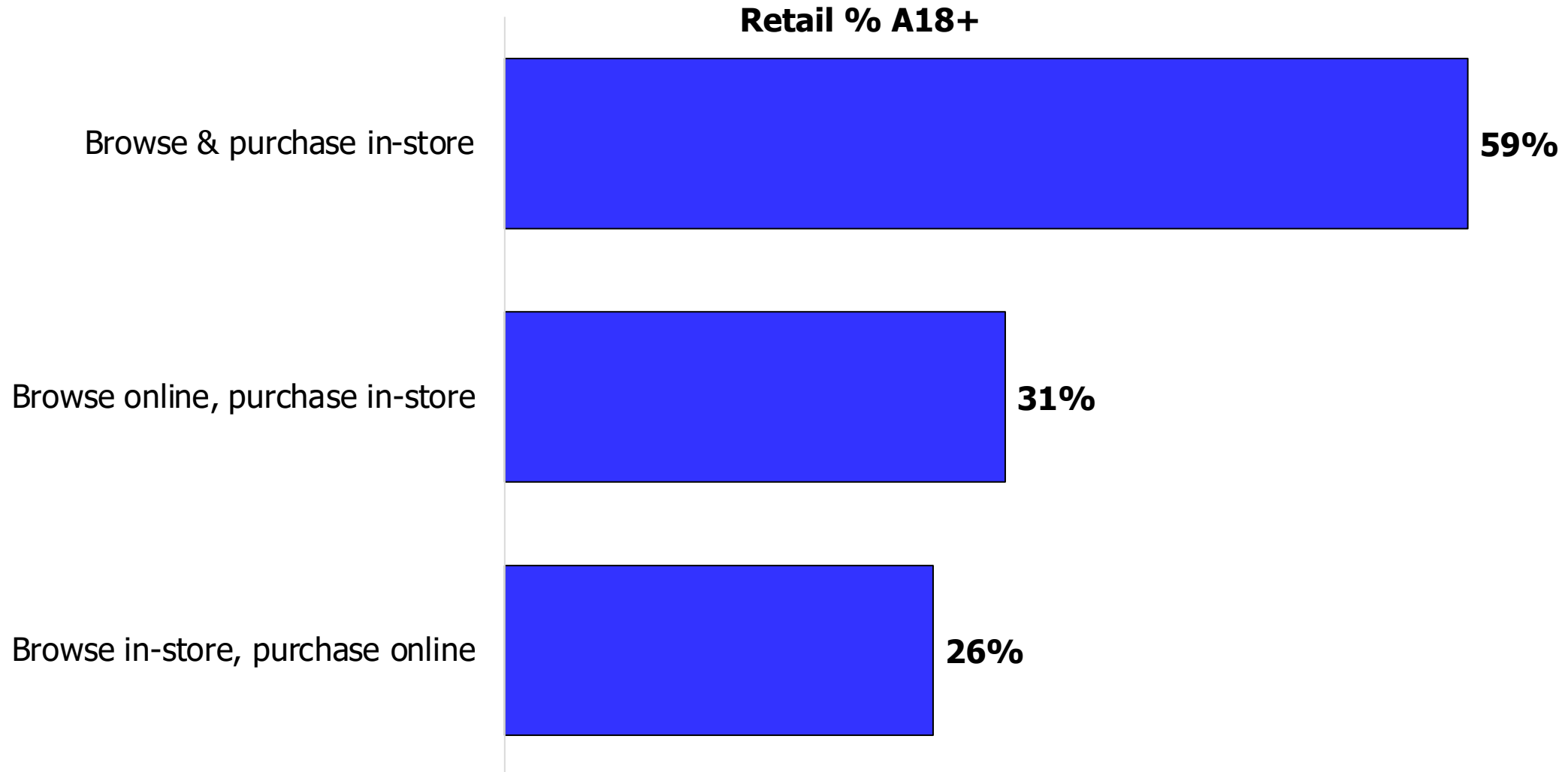
74% of Retail Consumers Shopped Both In-Store & Online During The Holiday Season

Retail Online = Online Only + Online & In-store
Retail In-Store = In-Store Only + Online & In-store

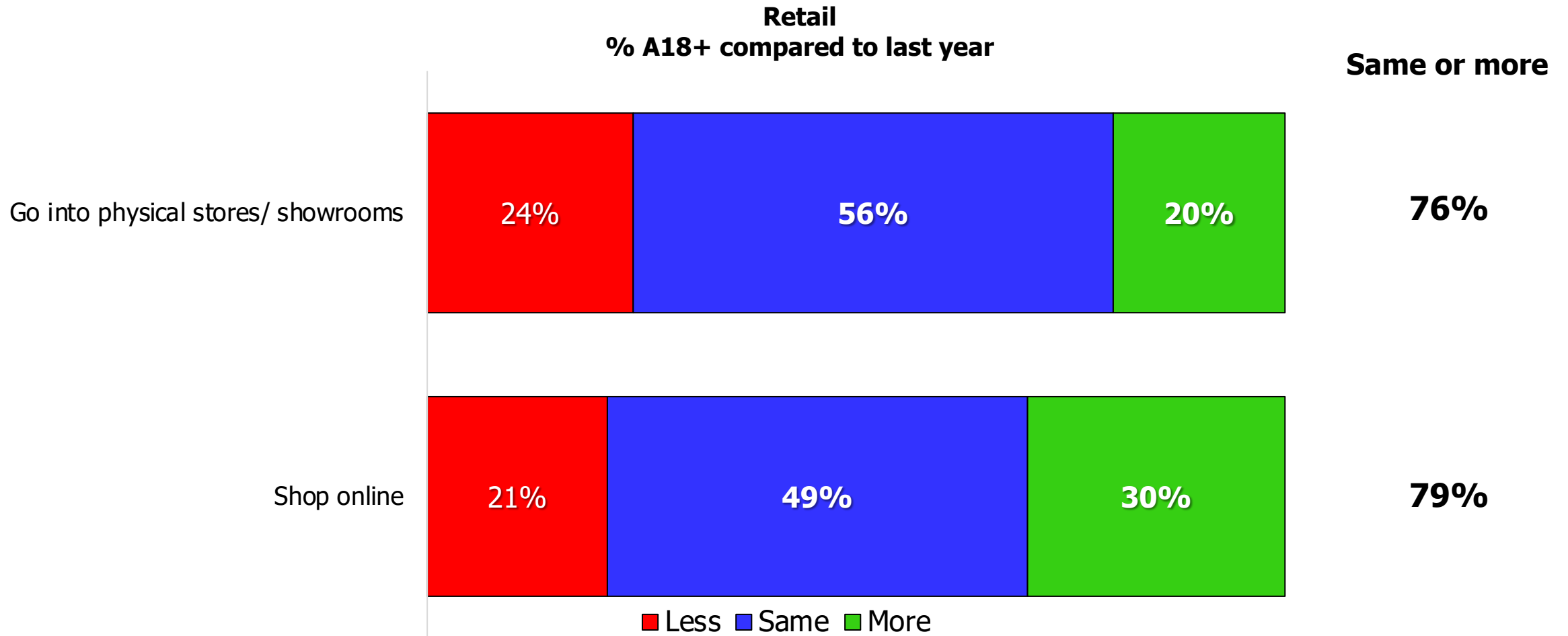


Holiday Season: Shopping Activity At Retail Locations

6 out of 10 respondents browsed AND purchased in-store.



"Are You Currently, Or Planning to Do More, Less, or The Same?"

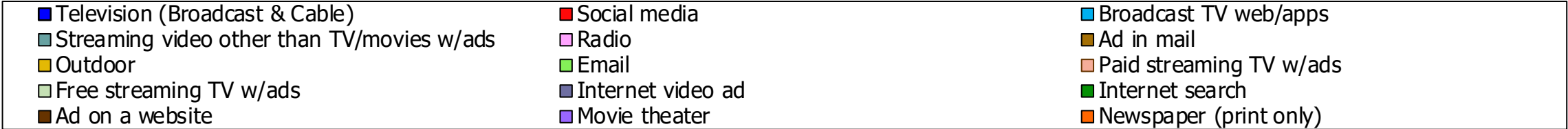
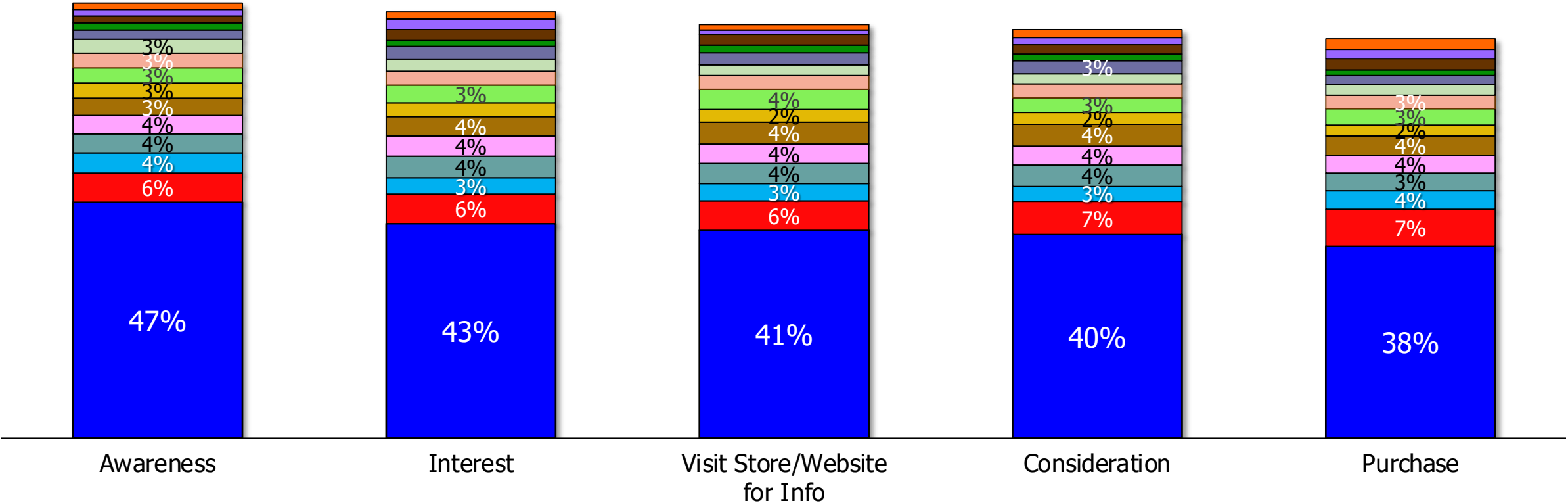


Source: GfK TVB Purchase Funnel 2024 In-store retail category, A18+

CI-1: "For each of the following, are you currently or planning to do more, less or the same compared to what you did a year ago?" Among those for whom the questions were applicable.

What Influenced In-Store Retail Consumers Most: Television

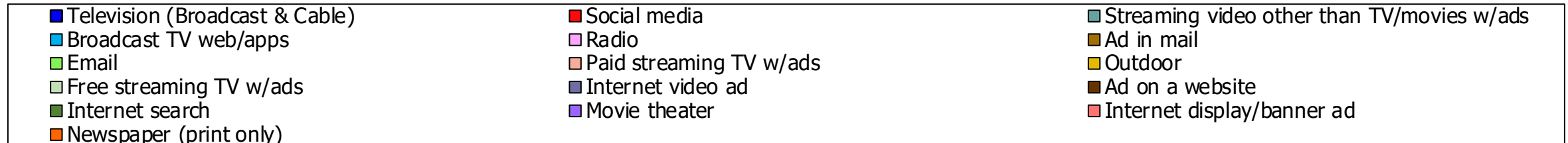
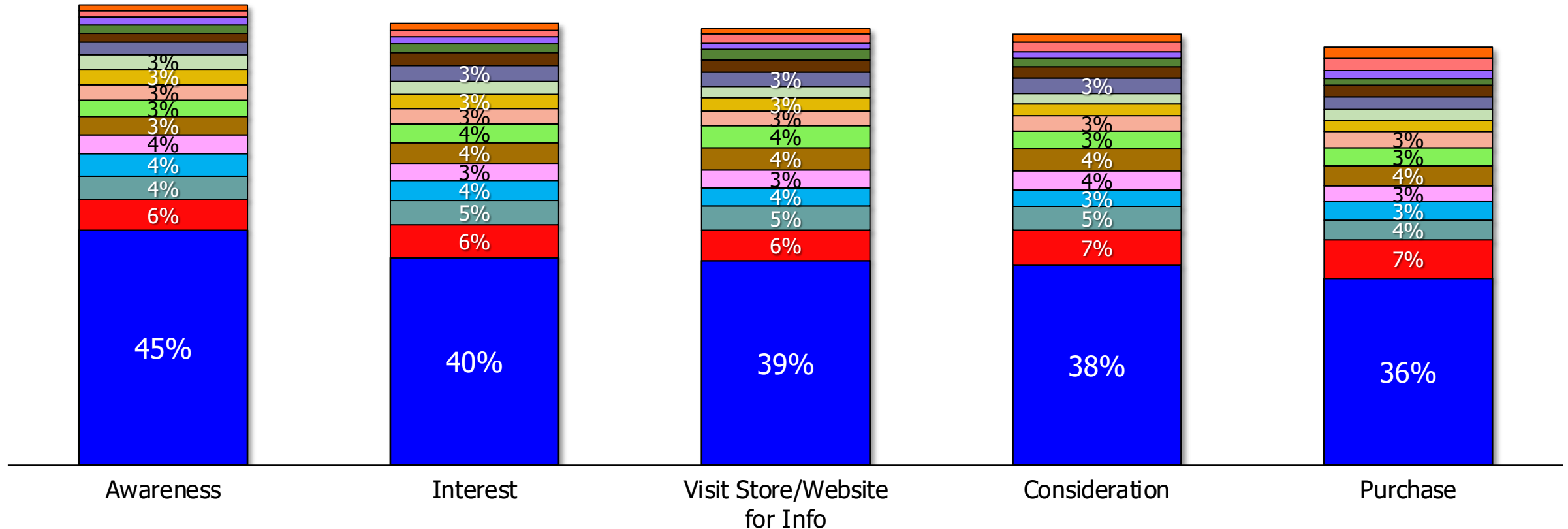
In-store Retail



Source: GfK TVB Purchase Funnel 2024 In-store retail category 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.

What Influenced Online Retail Consumers Most: Television

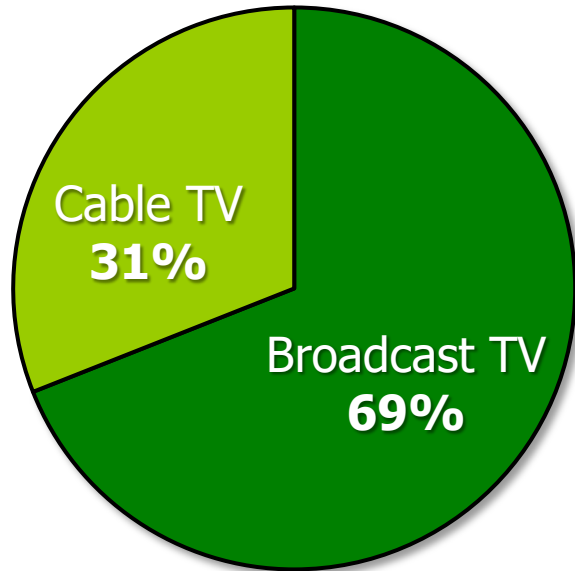
Online Retail



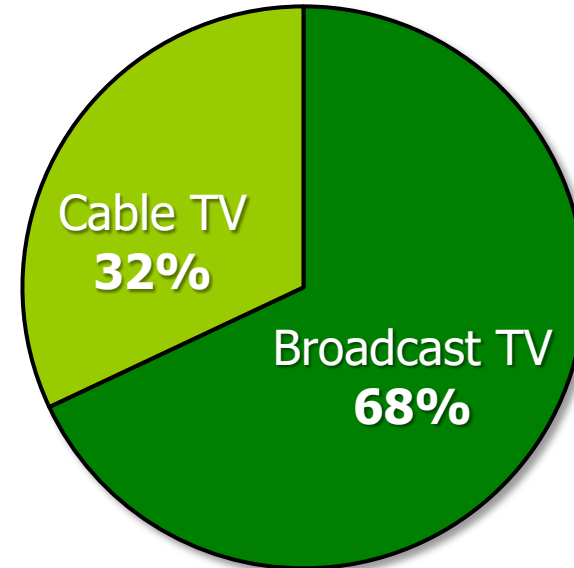
Source: GfK TVB Purchase Funnel 2024 Online retail Category A18+
 QA4/QA5/QA6/QA7/QA8 Most important for media with at least 1 funnel stage at 2%+ shown; 2%, 1%, & 0% not shown/labeled.

Of Those that Cited TV as the Most Important in Awareness Phase, 7 out of 10 Picked Broadcast TV

In-Store Retail



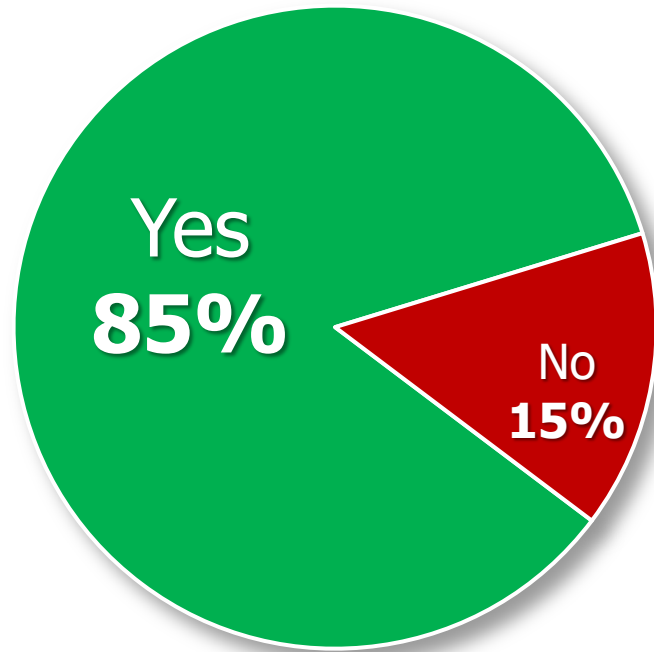
Online Retail



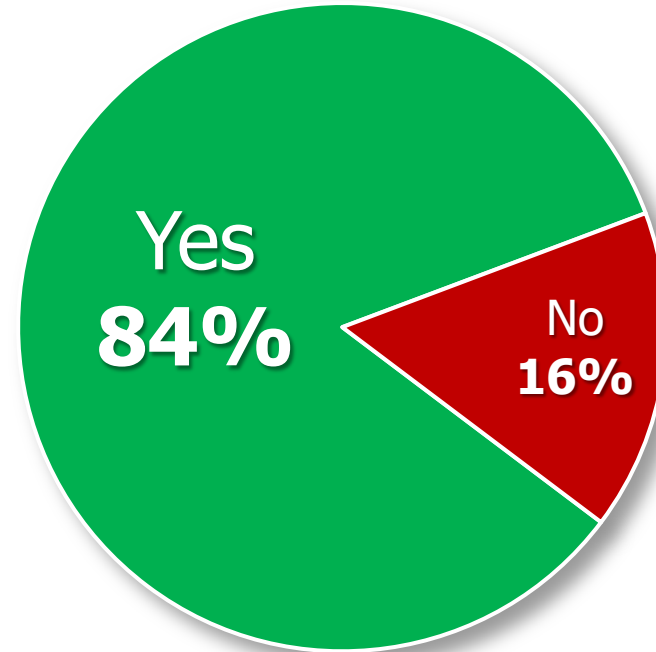
Source: GfK TVB Purchase Funnel 2024 In-store & Online retail category A18+
QA4 "Thinking about the ads you saw/heard for the categories, which advertising media made you most aware of the category?"
How to read: Of those who chose television as most important for awareness, 68% chose broadcast TV.

"Have TV ads influenced your search selections?"

In-store Retail
% A18+ Who do online searches



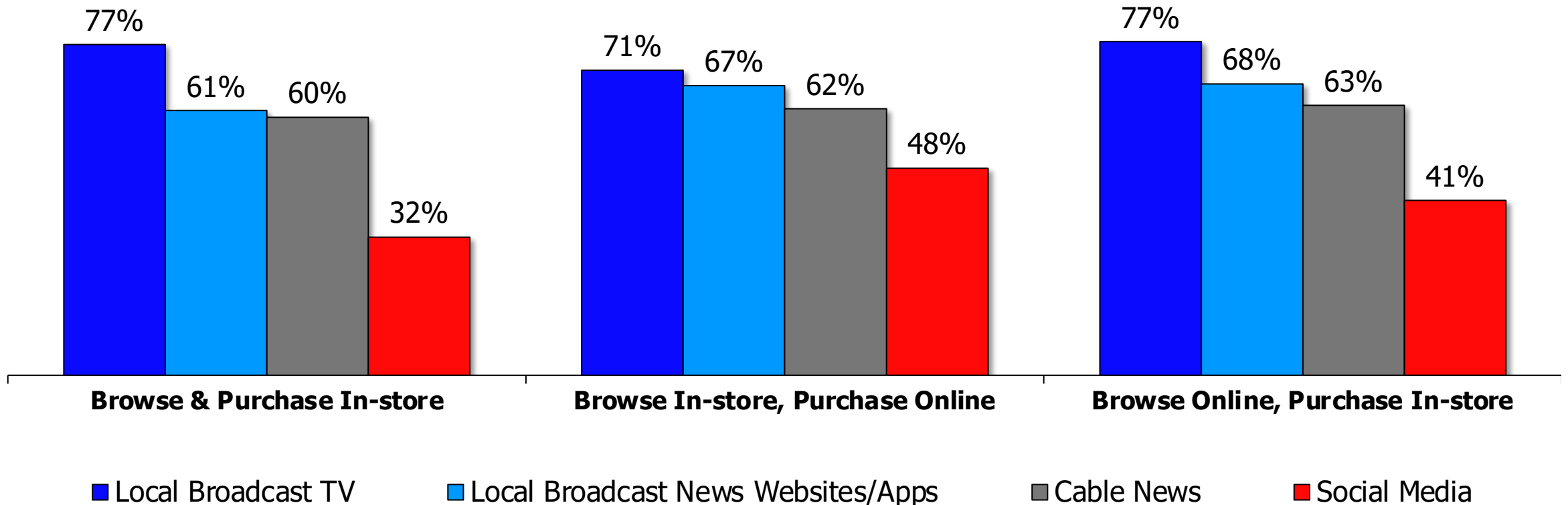
Online Retail
% A18+ Who do online searches



Source: GfK TVB Purchase Funnel 2024 In-store/online retail category 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).

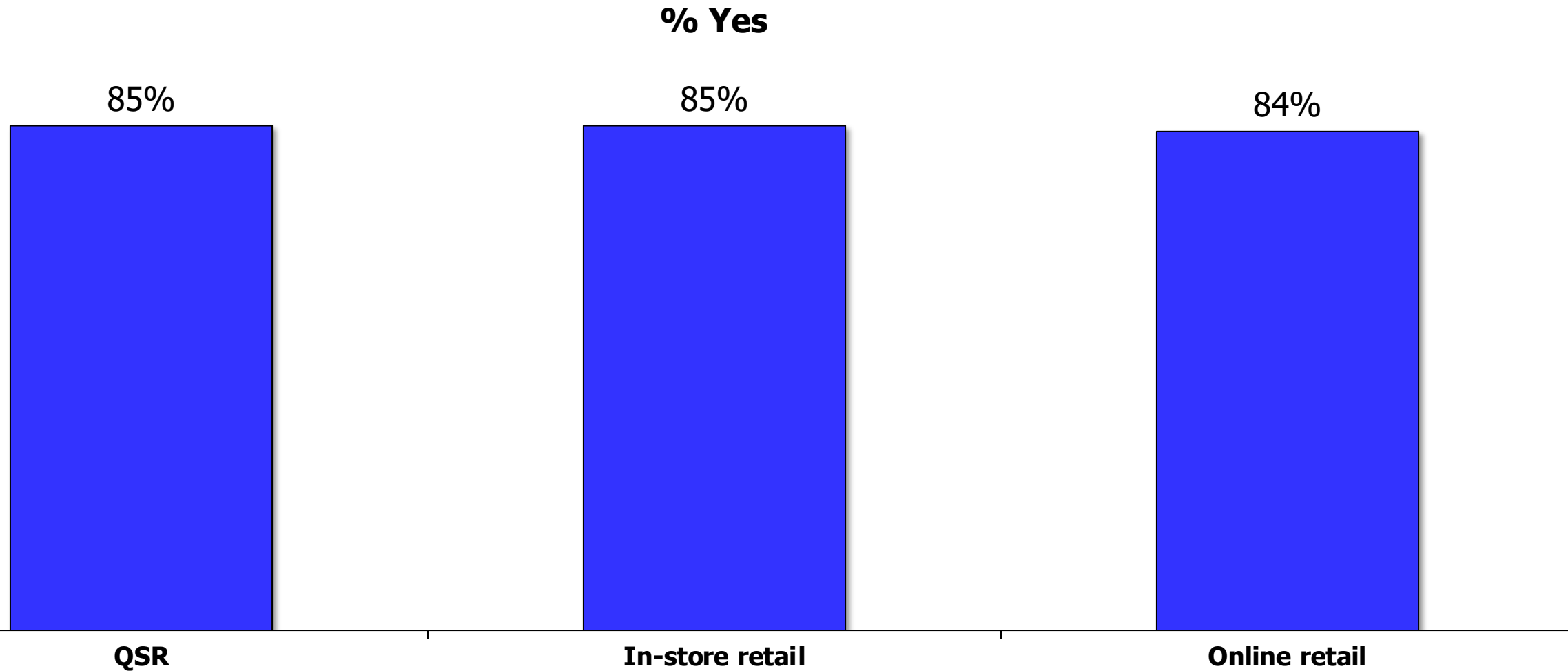
Regardless of Physical Retail Methods, Shoppers Highly Trust Local TV Assets

**Retail
% A18+ Agreeing**



Source: GfK TVB Purchase Funnel 2024 In-store retail category, A18+
B2 "I trust the news I see/hear on this media source." (Agree Strongly + Agree Somewhat).

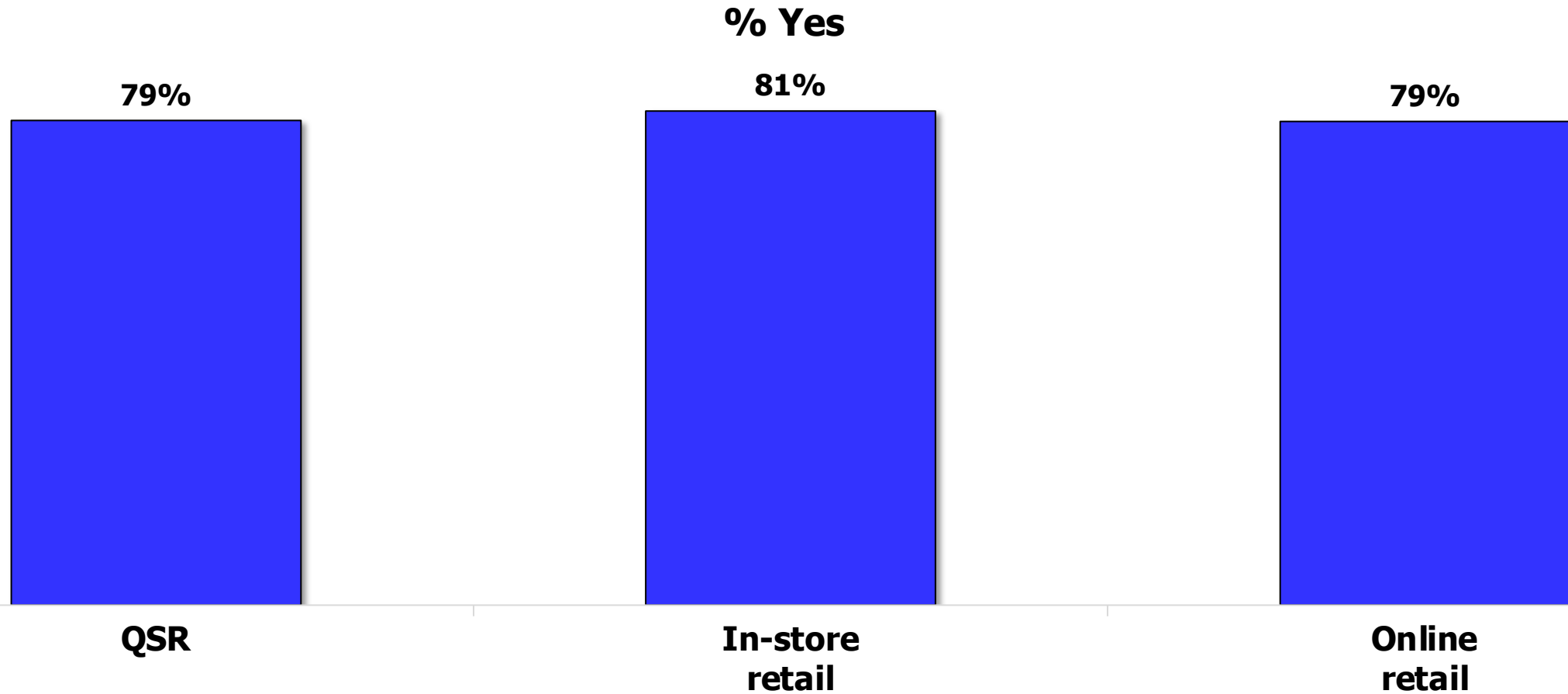
"Have TV ads influenced your search selections?"



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)

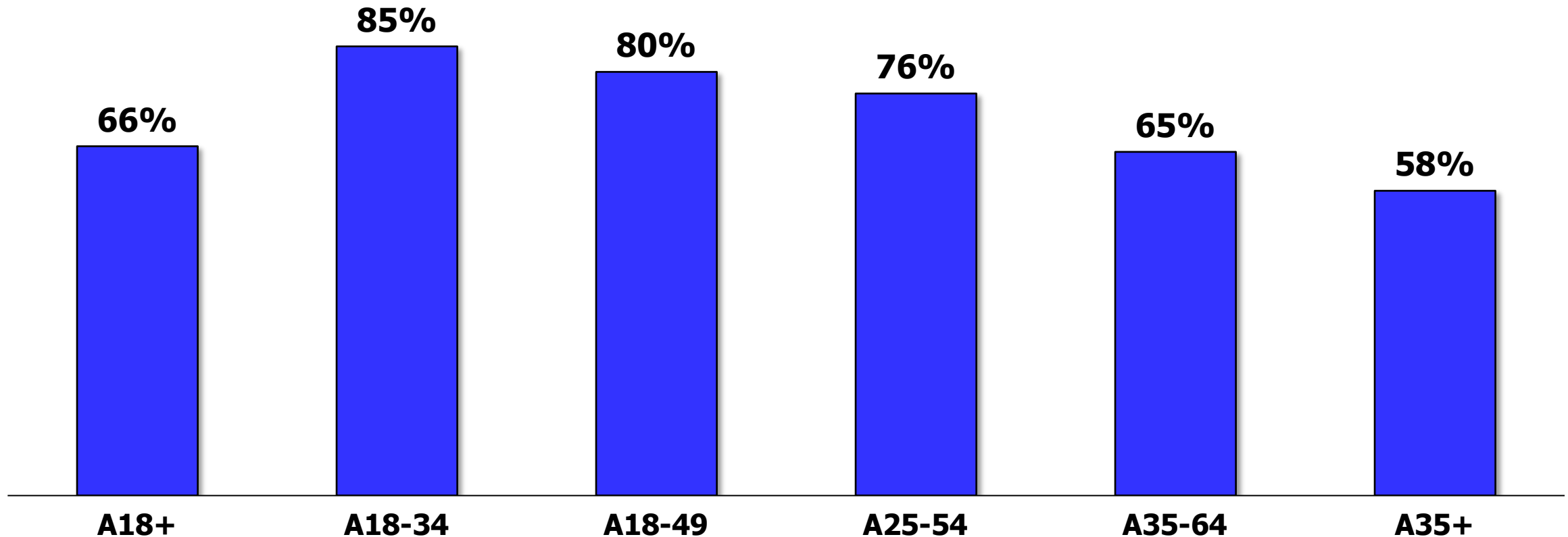
“When visiting a television station’s website or app, do you view the ads?”



TV Motivates Key Demos, Especially Younger Adults

Which of the following did you do after seeing/hearing the ads for the category on television?

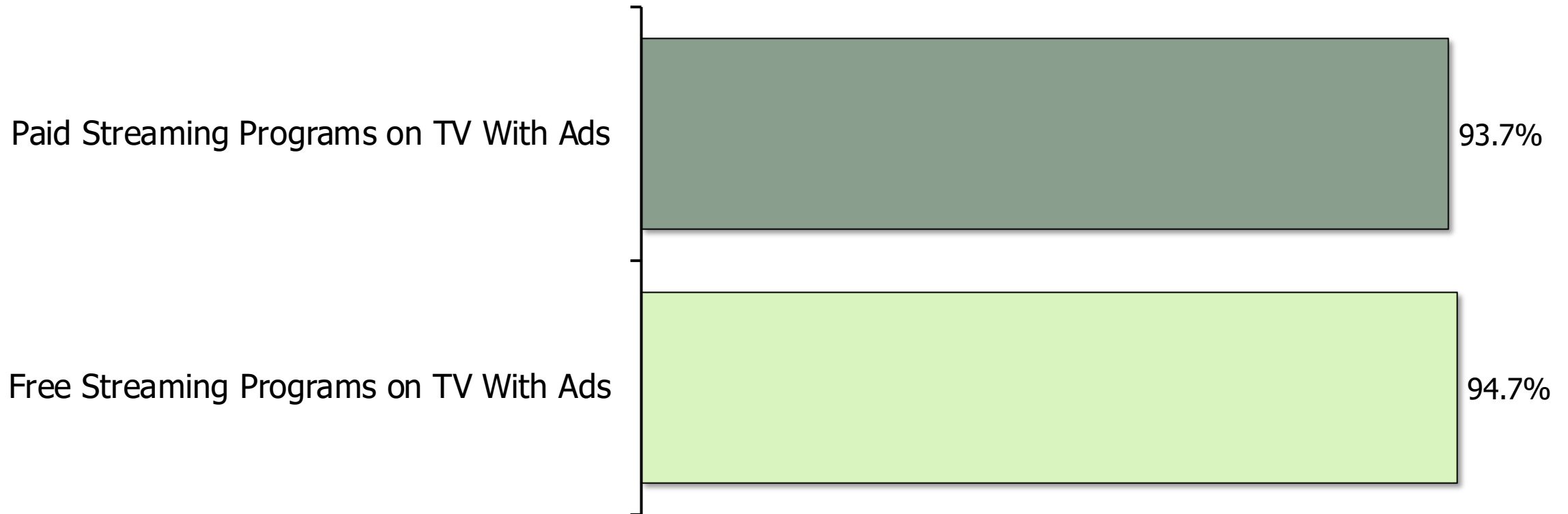
Any Action



Linear TV/Streaming
It's Not an Either/Or
It's an AND

If They Watch Streaming on a TV Set, They Are Reached by Broadcast as Well

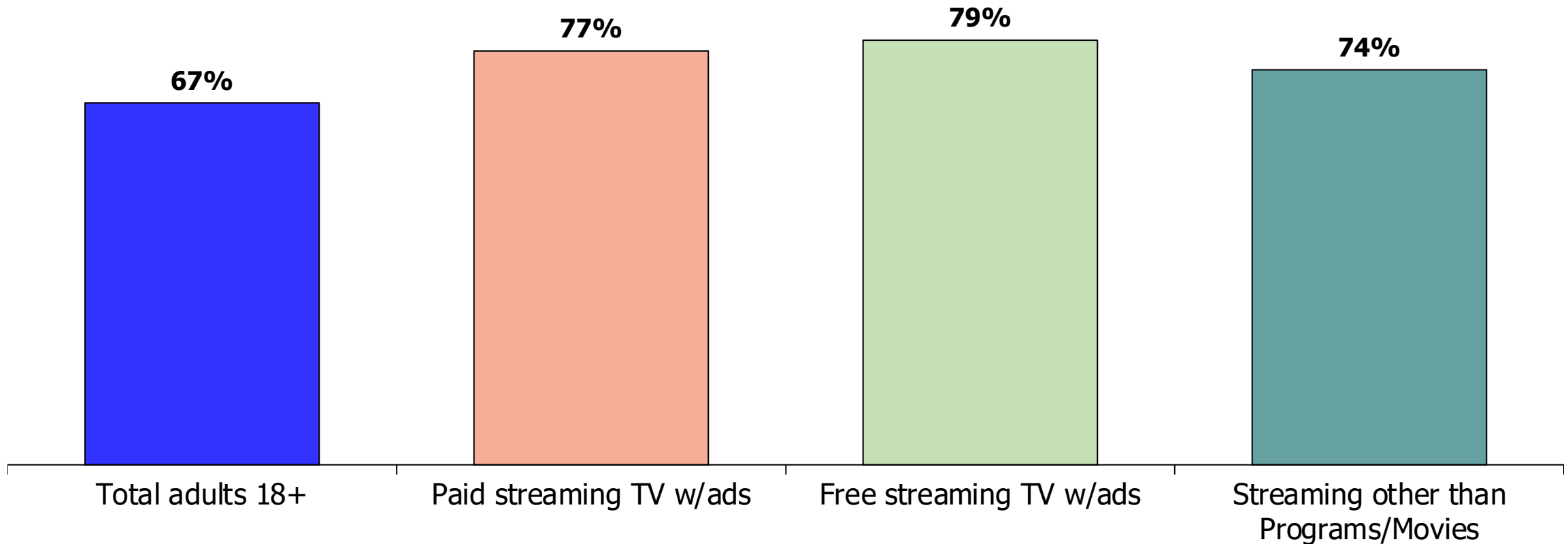
Percent of Each That Are Reached by Broadcast TV



To be read as: Broadcast reaches 95% of those that view free ad-supported streaming programs on TV.

A Higher Proportion of Streamers Are Exposed to Linear TV Than the Average Adult 18+ Respondent

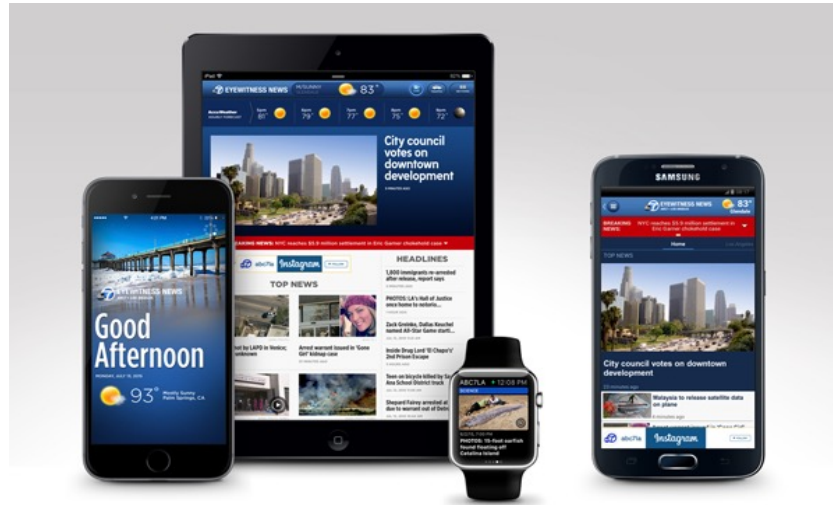
% Exposed to Linear TV Ad (Broadcast/Cable)



To be read as: Looking at those exposed to free streaming with ads (FAST,AVOD) as their own universe, 79% are also exposed to Linear TV advertising.

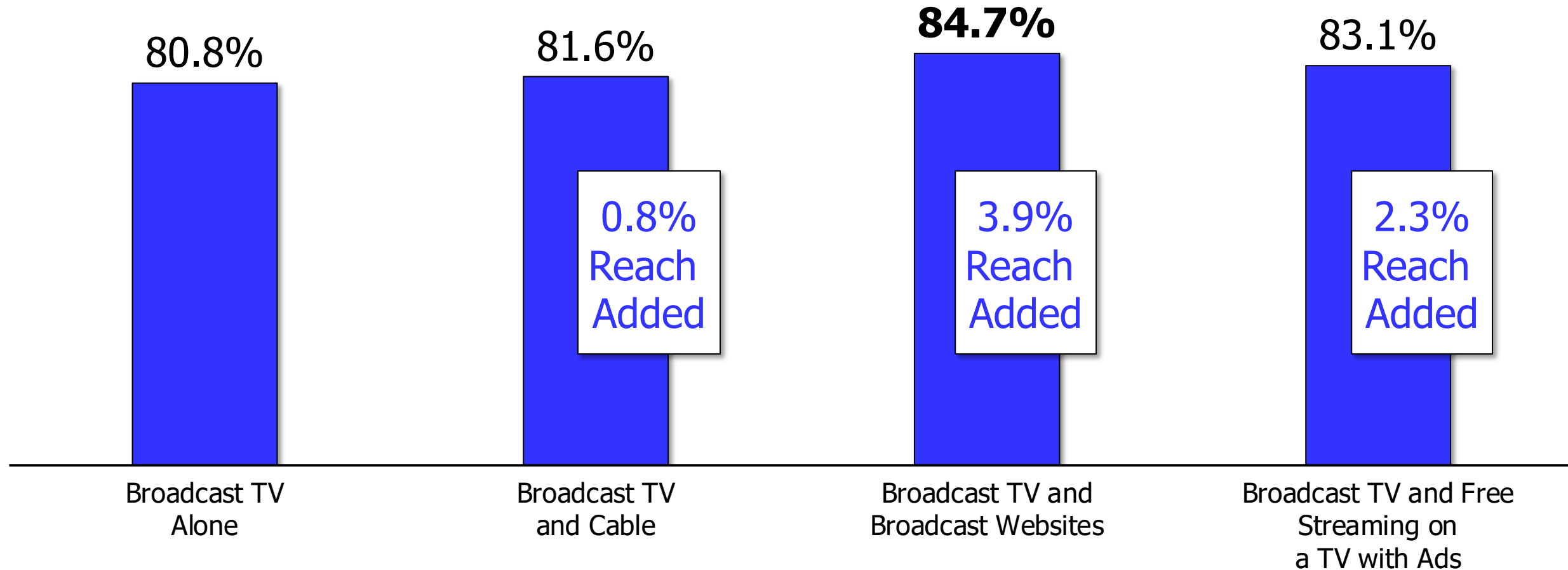
Source: GfK TVB Purchase Funnel 2024 A18+
S10/S11 "In the past two months, did you see, hear or read any advertisement in any of these media/digital internet media?"

Broadcast TV Websites/Apps Provide Multi-platform Opportunities



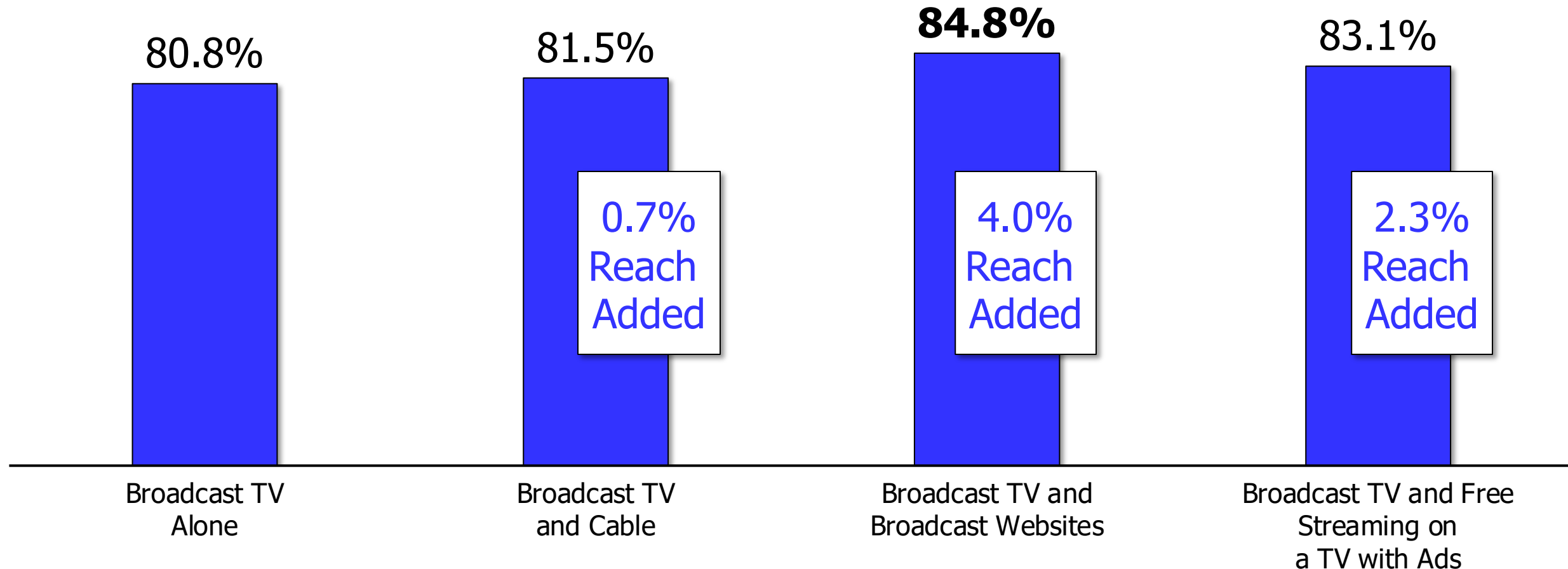
Broadcast Websites Added More Reach to Broadcast TV than Cable or Streaming For In-Store Shoppers

A18+ Shopped **in-store** in the past year



Broadcast Websites Added More Reach to Broadcast TV than Cable or Streaming For **Online** Shoppers

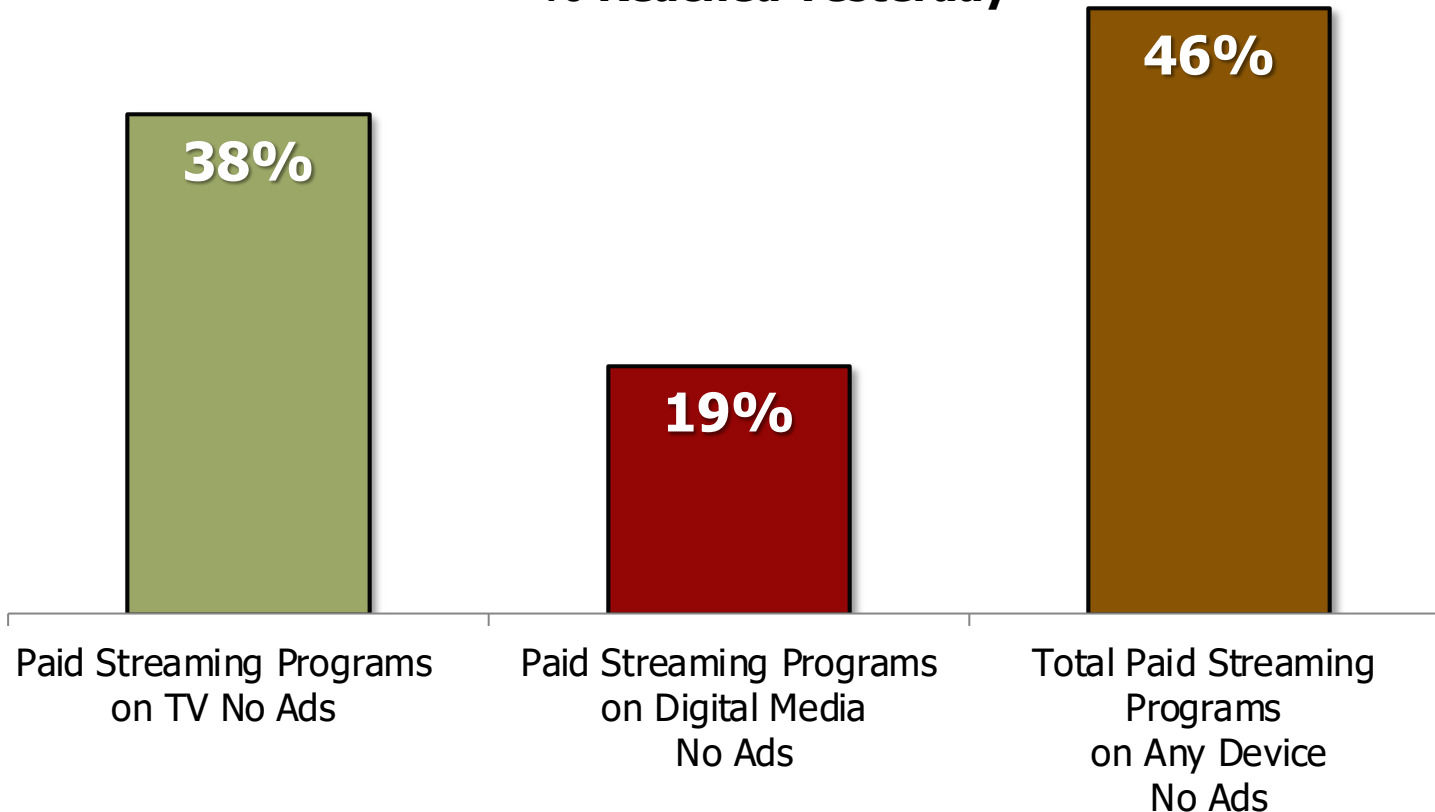
A18+ Shopped **online in the past year**



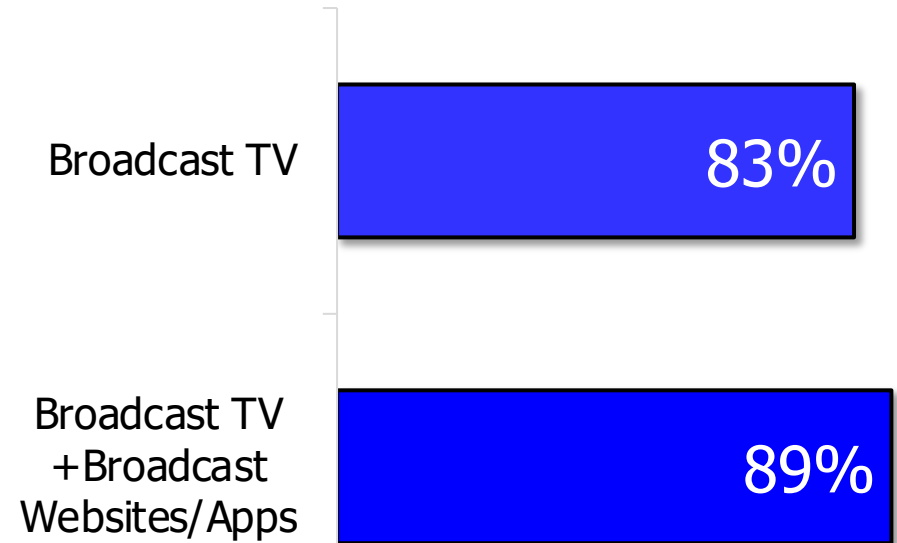
Broadcast TV Assets Can Reach Those Who Stream Programming on Ad-Free Platforms

Streaming with NO Advertising: Advertisers Cannot Reach these Viewers But Broadcast Assets **Can** Reach Most of Them

**In-Store Retail Shoppers
% Reached Yesterday**

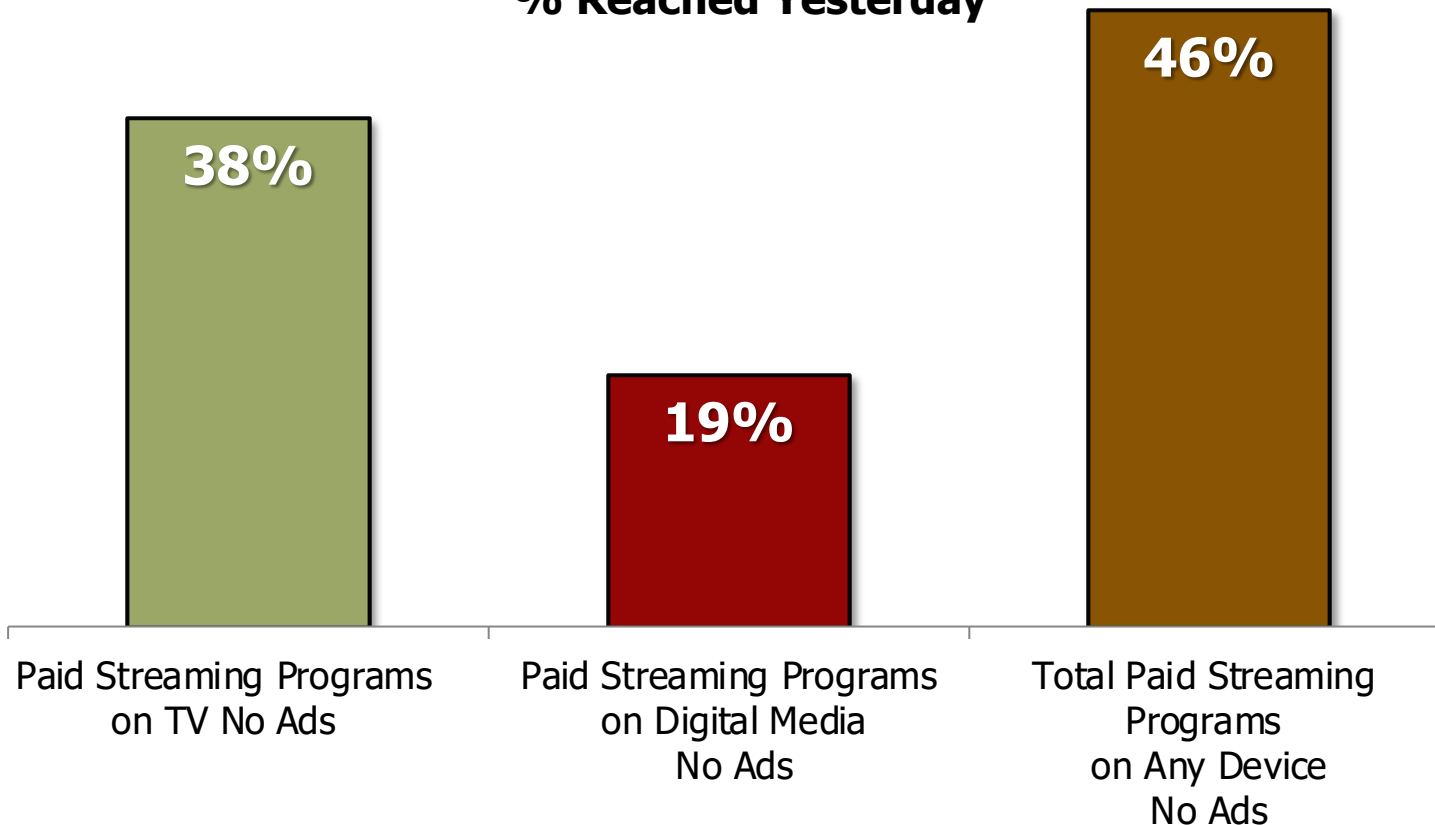


**In-Store Retail Shoppers
% Reach of Streamers with No Advertising**

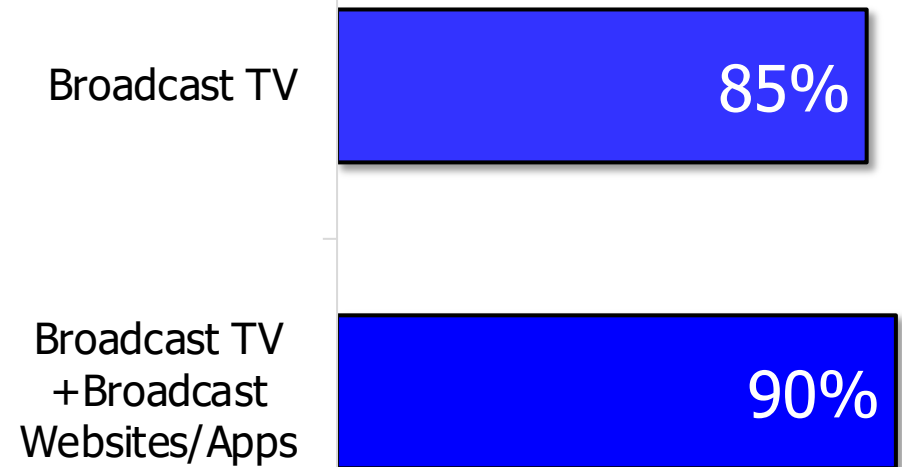


Streaming with NO Advertising: Advertisers Cannot Reach these Viewers But Broadcast Assets **Can** Reach Most of Them

Online Retail Shoppers
% Reached Yesterday



Online Retail Shoppers
% Reach of Streamers with No Advertising



Key Mother's Day Takeaways

- Mother's Day consumer spending in 2024 is projected to be a near record high at \$33.5 Billion.
- TV advertising is imperative to influence Mother's Day shoppers.
- 9 out of 10 respondents said television influenced their search selections.
- Broadcast TV delivers top Mother's Day ratings and reach.
- Local TV allows advertisers to target their message in a trusted environment.
- Broadcast TV delivers both in-store and online shoppers.
- Online shoppers and in-store shoppers selected television as the most important influence.
- Broadcast TV assets can reach those who stream programming on ad-free platforms.



Thank You