

Happy Mother's Day

2024

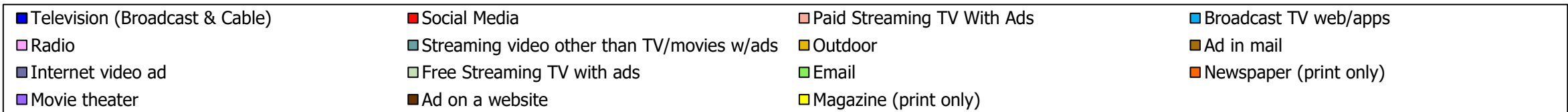
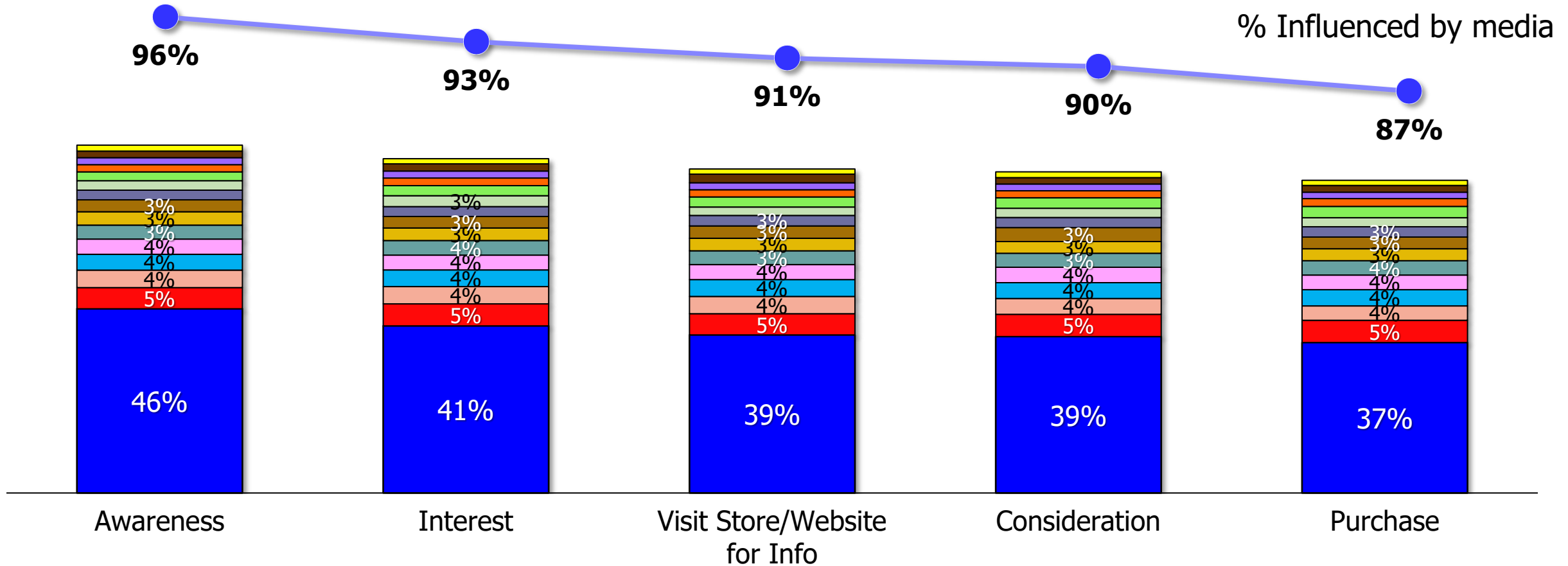


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TV Advertising Is Imperative To Influence Mother's Day Shoppers

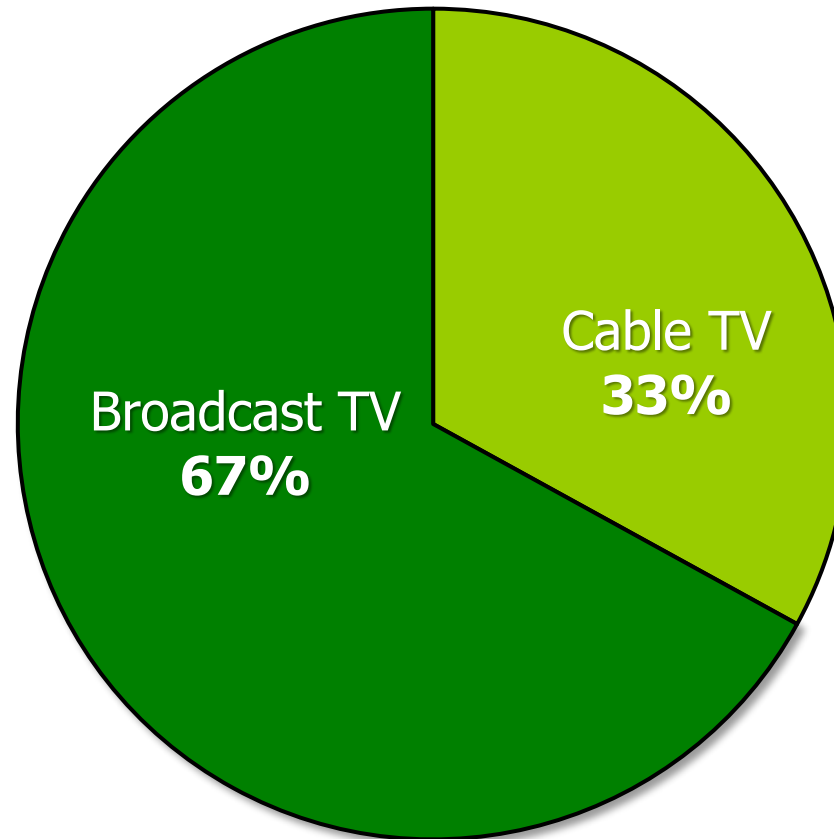
What Influenced Consumers Most: Television



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:



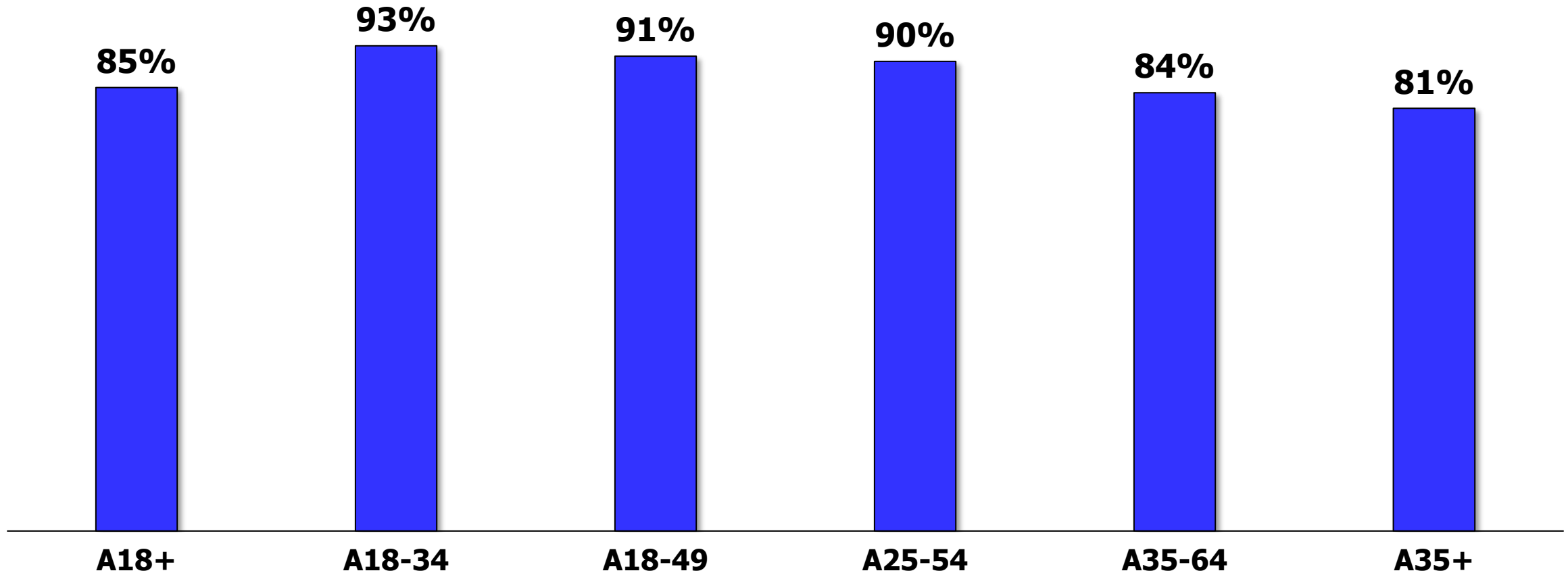
Source: GfK TVB Purchase Funnel 2024 A18+

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?”

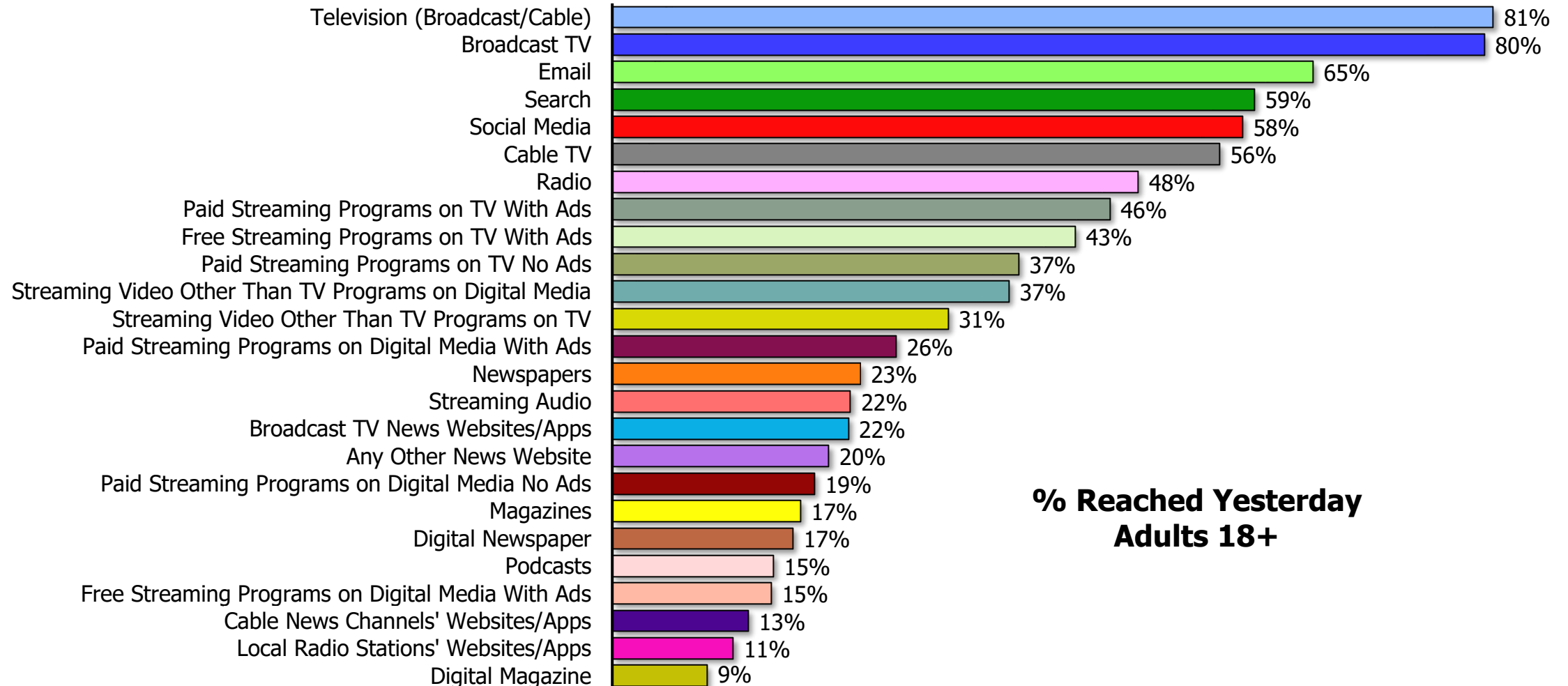
“Yes” Among Those Who Do Online Searches



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.

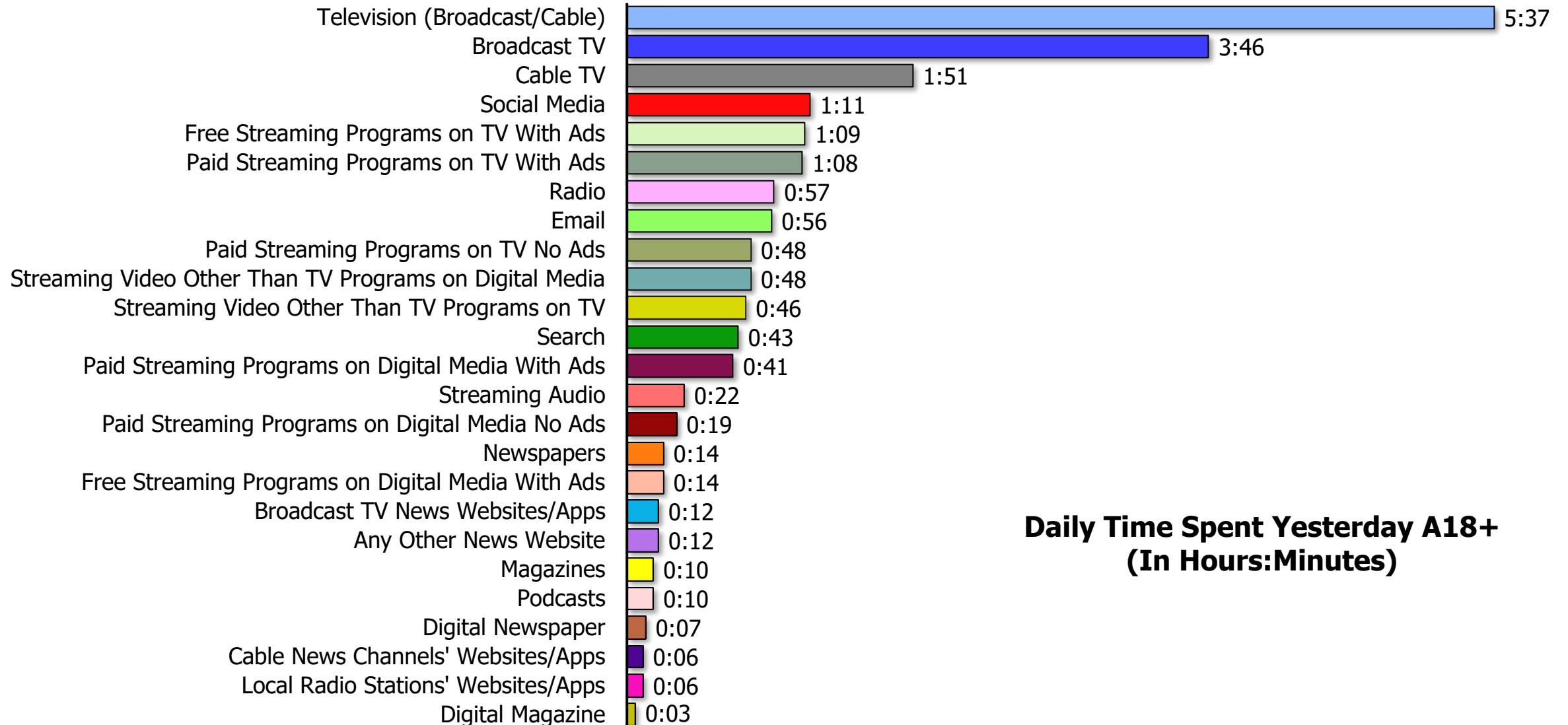
TV Has Highest Reach of All Platforms Measured

Broadcast Leads the Way



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

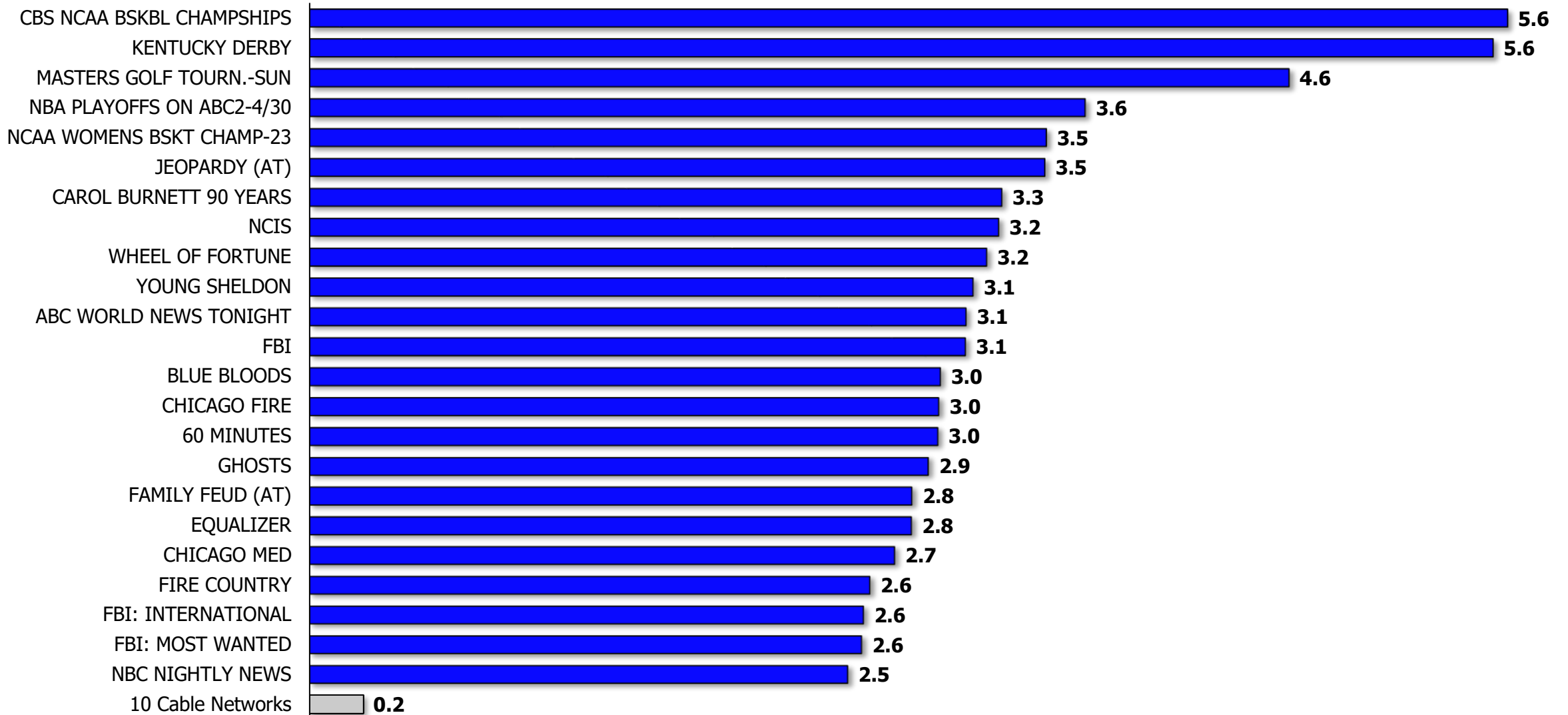


**Daily Time Spent Yesterday A18+
(In Hours:Minutes)**

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.

Broadcast Delivers Top Rated Programs

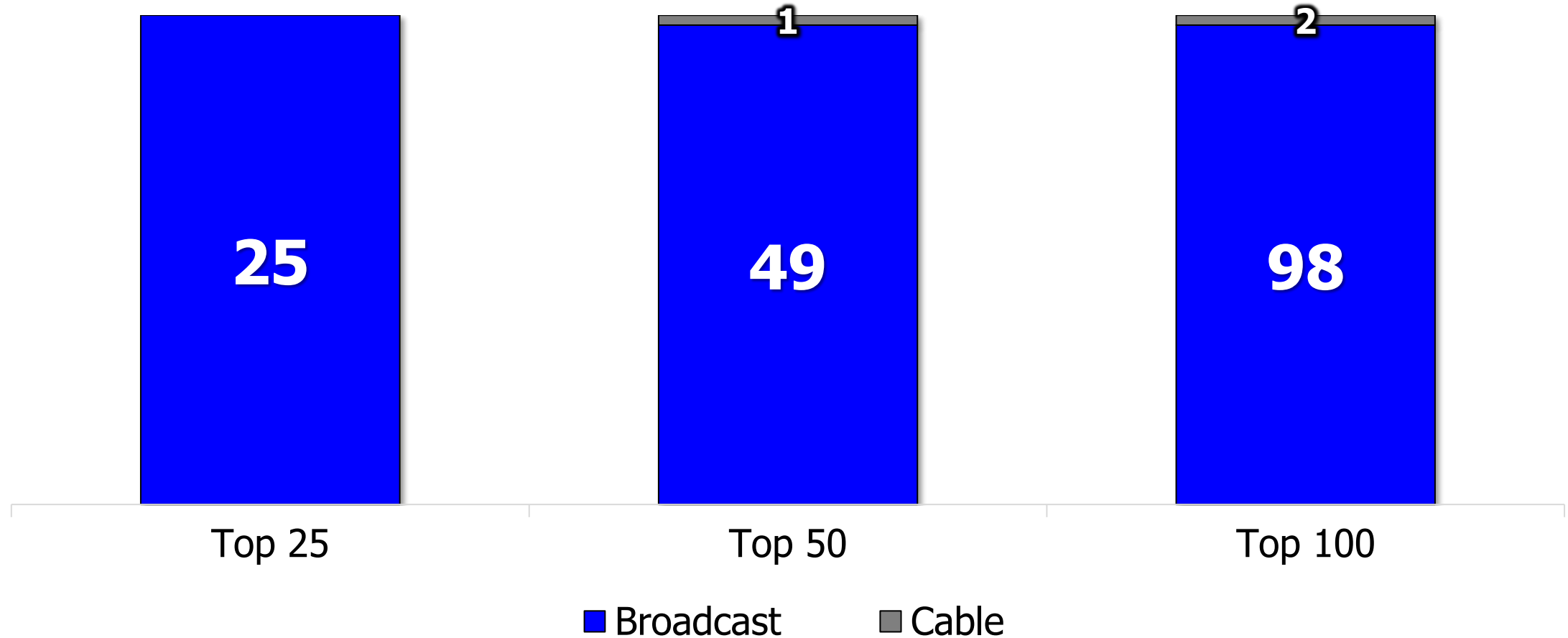
Adults 18+ Live+1 Ratings



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.

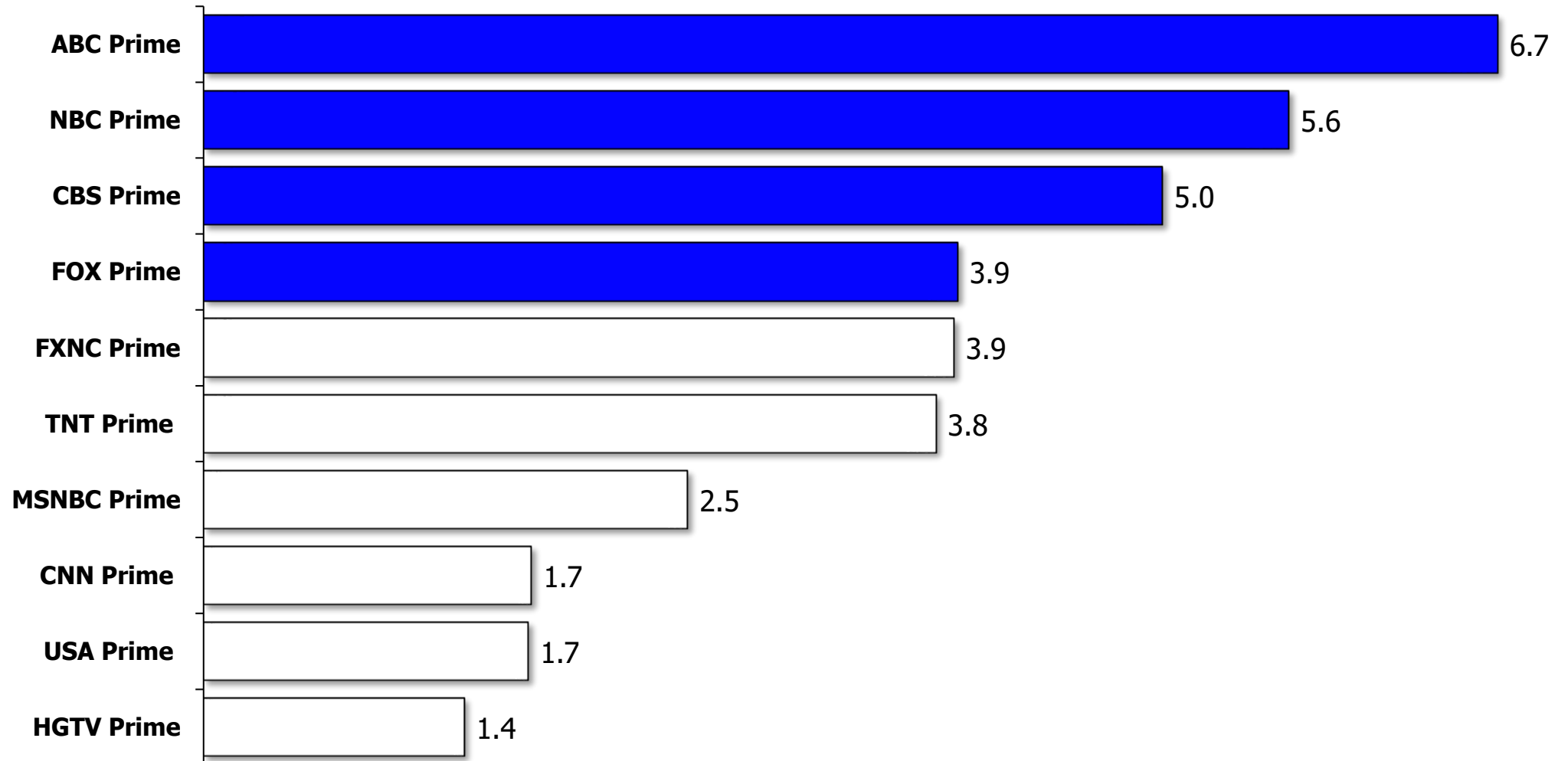
Broadcast TV Dominated the Top-Rated Programs

Of Top Rated Programs

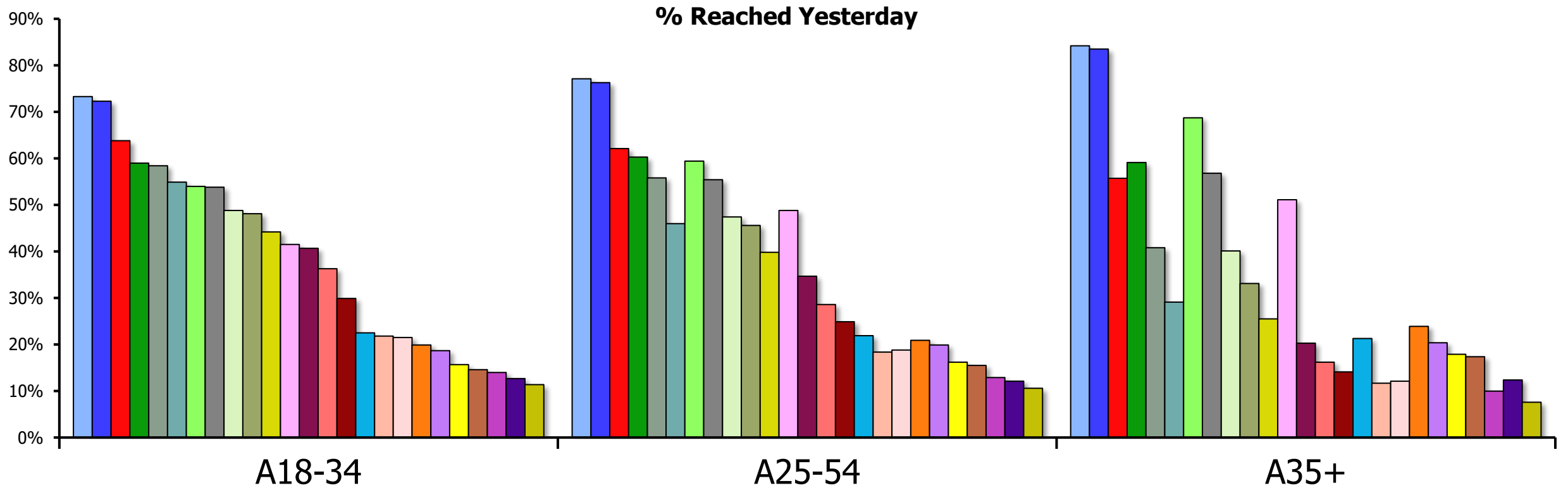


Broadcast TV's Reach: Significantly Higher Than Cable

A18+ One Day Prime Reach



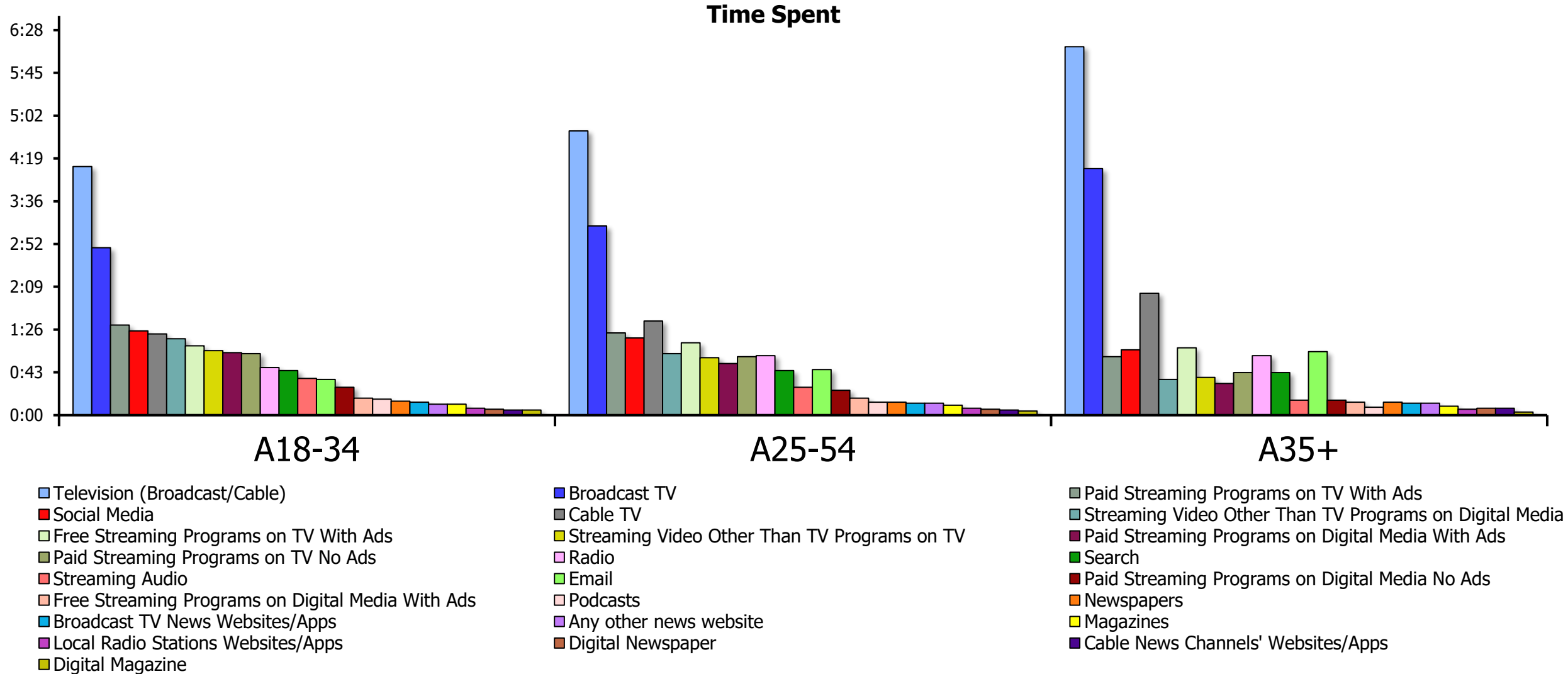
TV Has The Highest Reach for All Ages



- Television (Broadcast/Cable)
- Search
- Email
- Paid Streaming Programs on TV No Ads
- Paid Streaming Programs on TV With Ads
- Streaming Video Other Than TV Programs on TV
- Streaming Video Other Than TV Programs on Digital Media
- Cable TV
- Free Streaming Programs on TV With Ads
- Free Streaming Programs on Digital Media With Ads
- Streaming Audio
- Paid Streaming Programs on Digital Media No Ads
- Broadcast TV News Websites/Apps
- Podcasts
- Newspapers
- Digital Newspaper
- Digital Magazine
- Broadcast TV
- Social Media
- Any other news website
- Local Radio Stations Websites/Apps
- Radio
- Magazines
- Cable News Channels' Websites/Apps

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



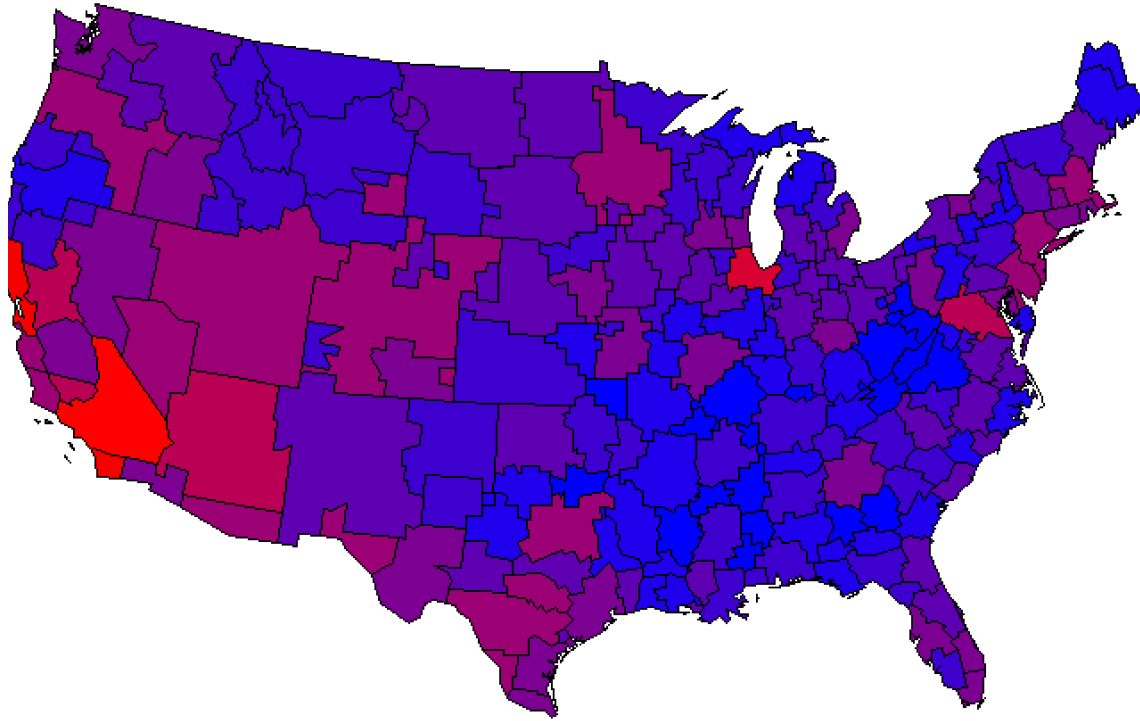
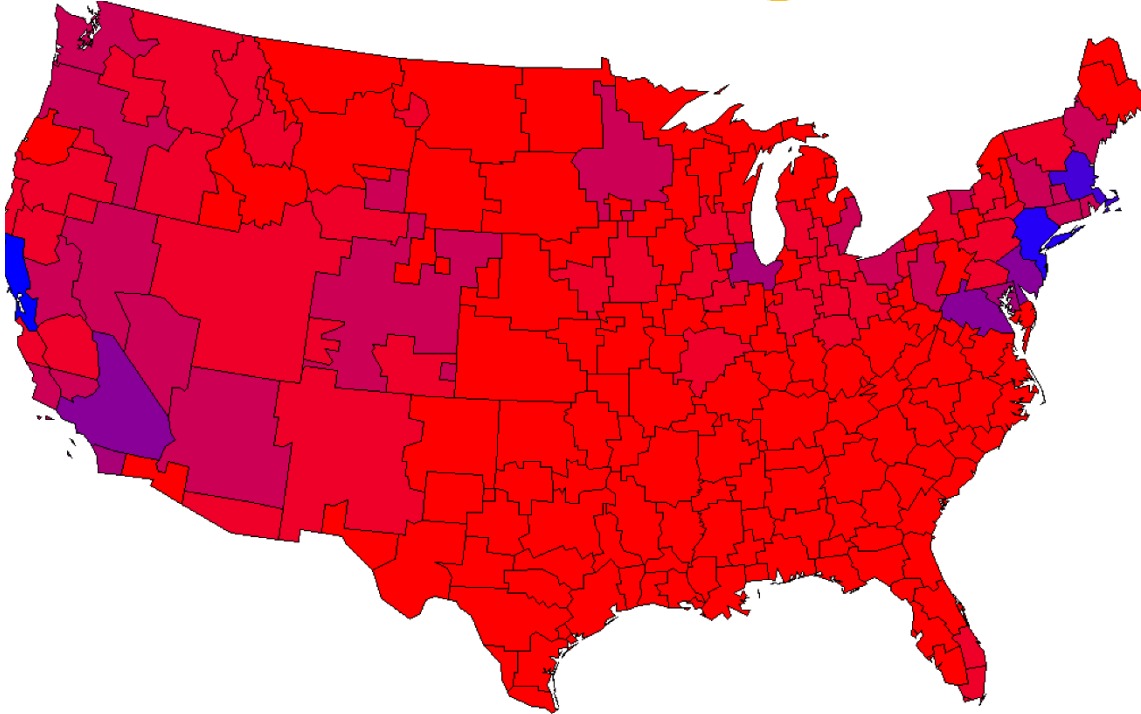
Source: GfK TVB Media Comparisons Study 2024. M-S 4A-2A. Online/internet platforms such as email, social media, internet radio and websites, are totaled for any online device-PC, Smartphone and Tablets. Broadcast TV News Websites/Apps includes local TV station & network websites/apps for news/weather/sports.

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 

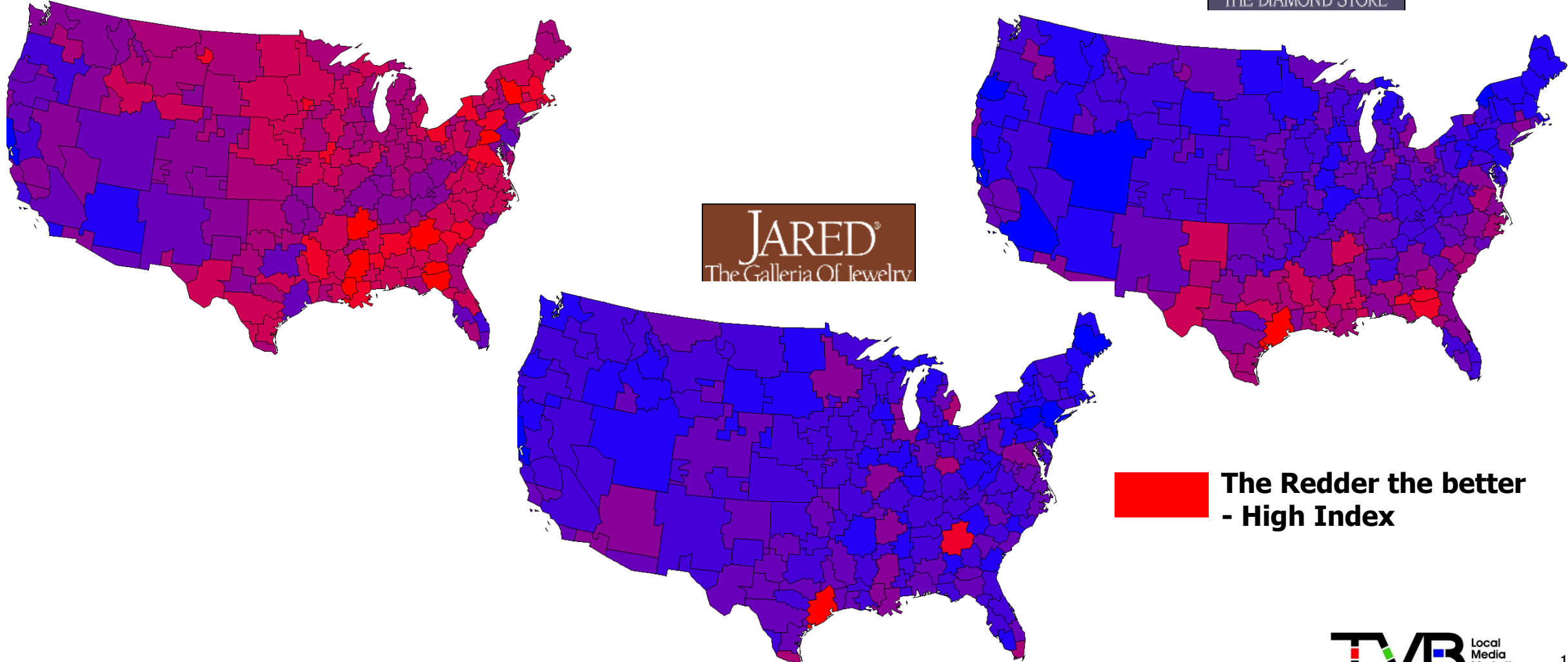
 TARGET®



 The Redder the better- Higher the Sales Index

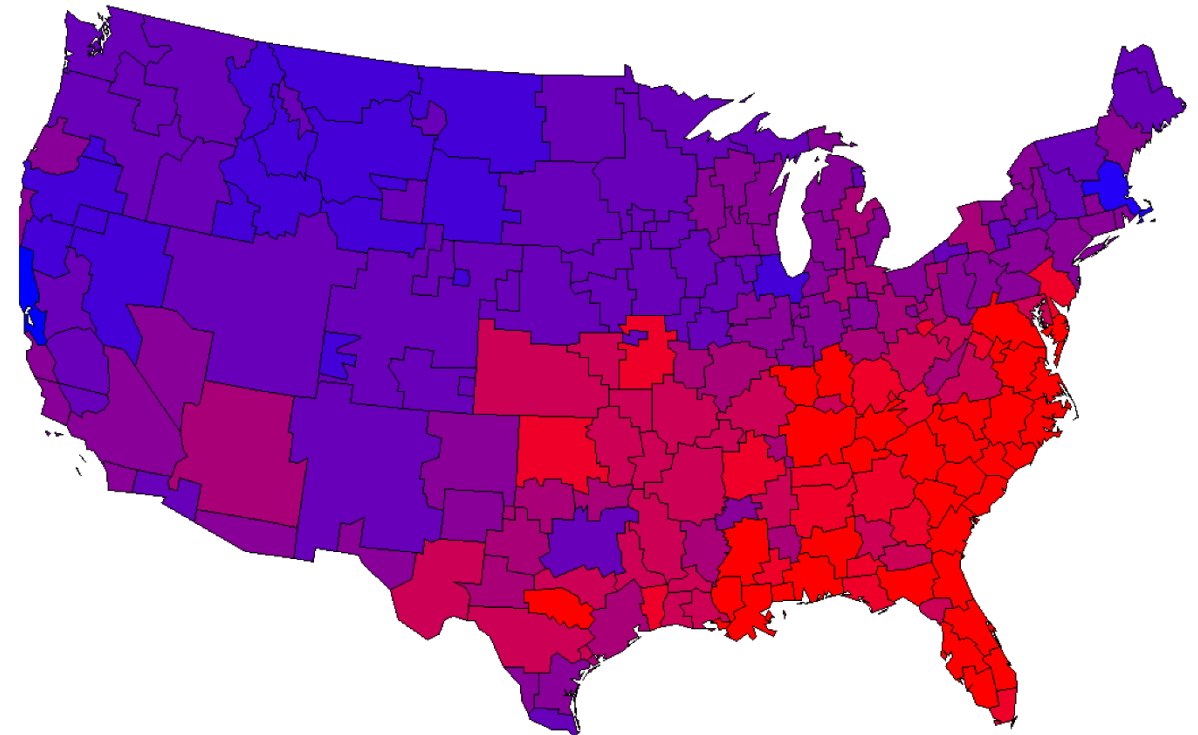
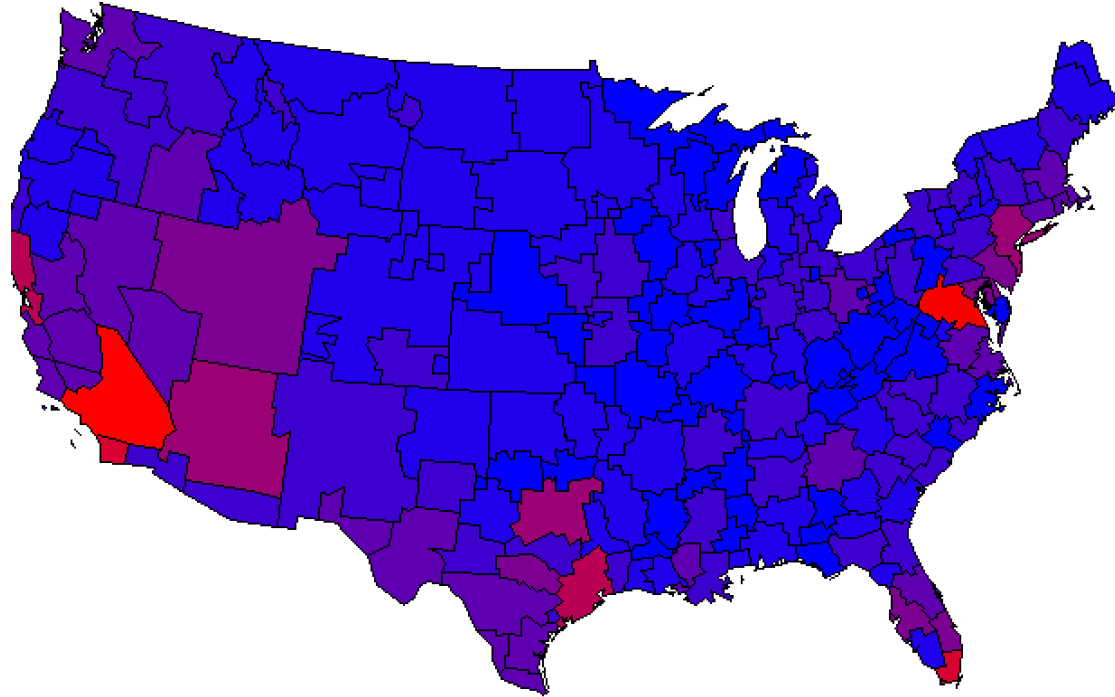
Source: MRI-Simmons 2023 Spring Market-by-Market weighted by Adult 18+ population. Shopped in past 3 months.

Jewelry Shopping is a Local Decision



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

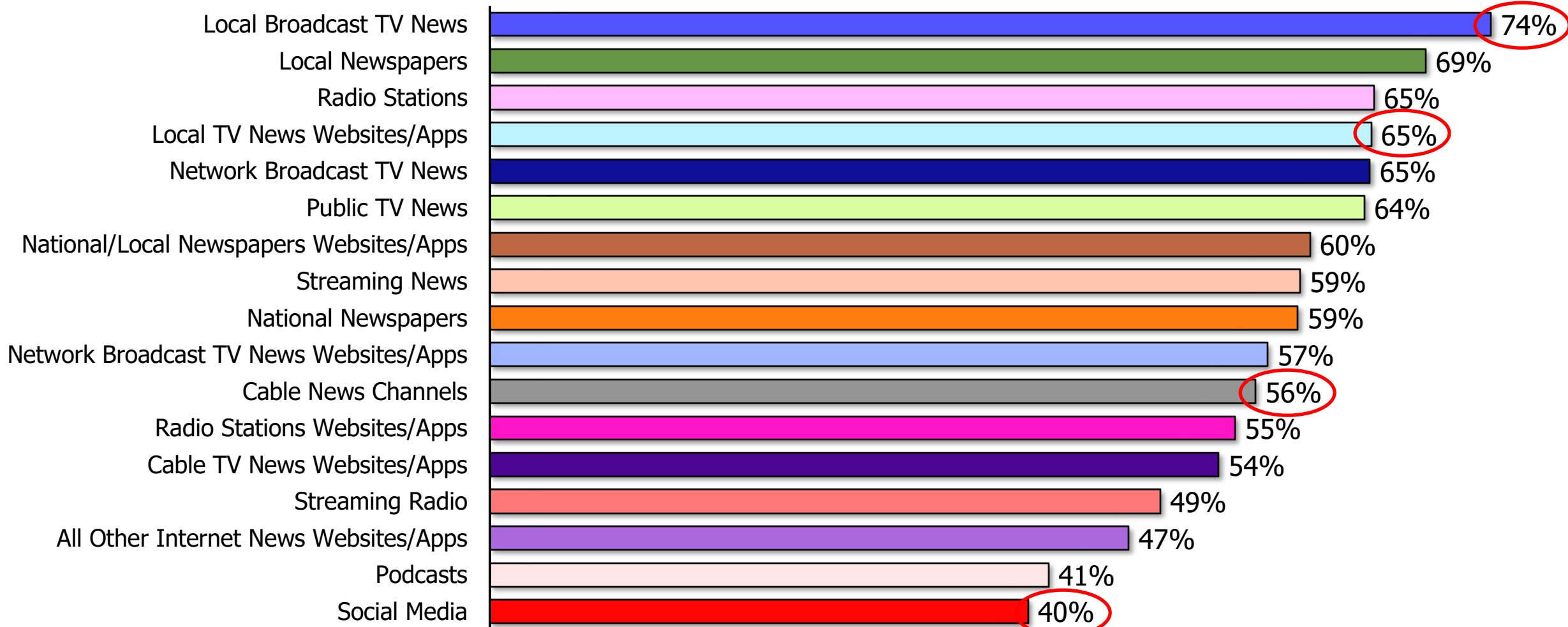


 **The Redder the better - High Index**

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



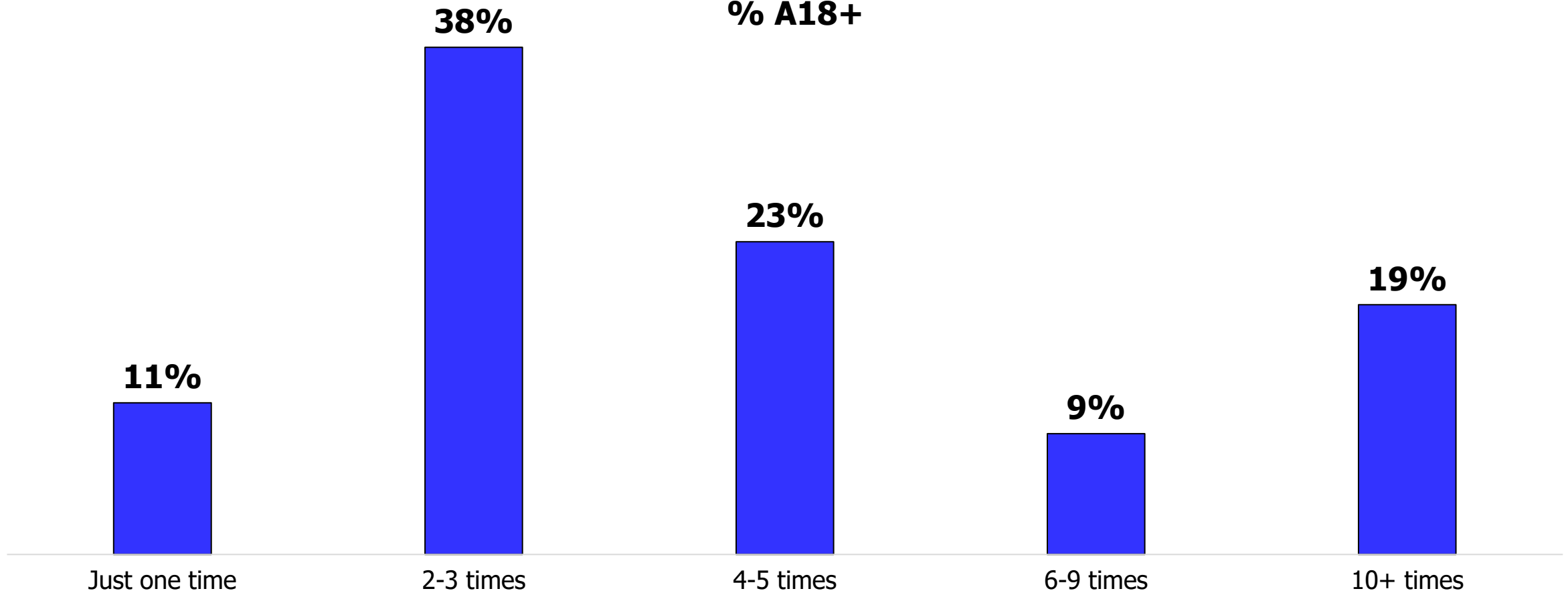
Source: GfK TVB Media Comparisons Study 2024. Persons 18+. Agree Strongly or Agree Somewhat.

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

% A18+



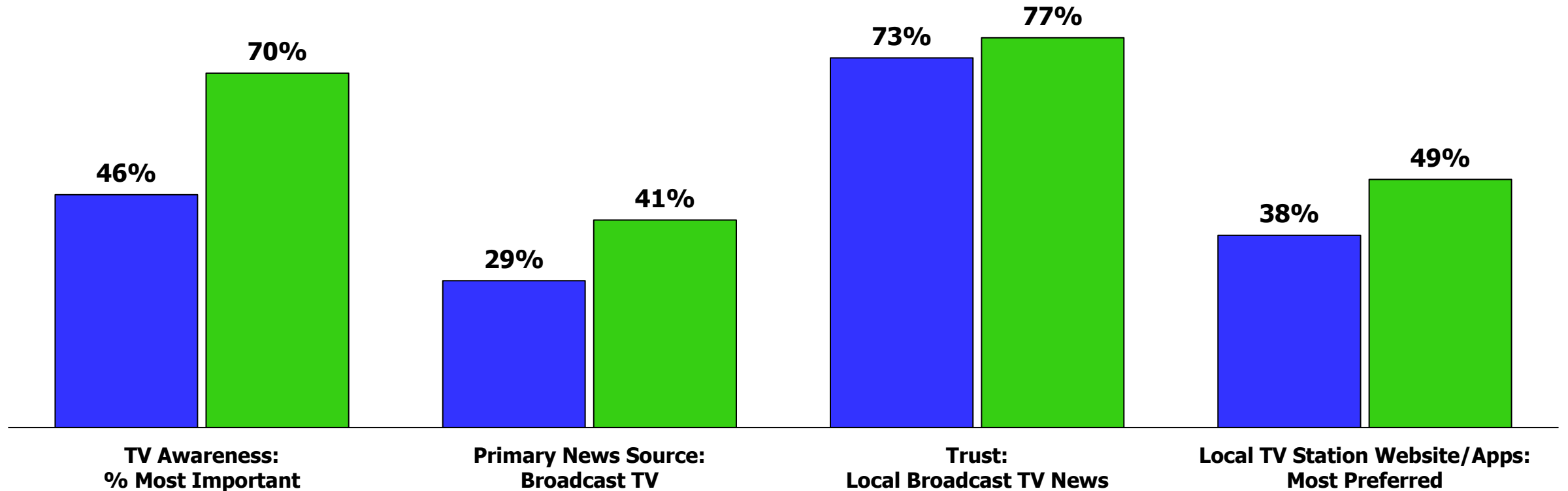
Source: GfK TVB Purchase Funnel 2024 A18+

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

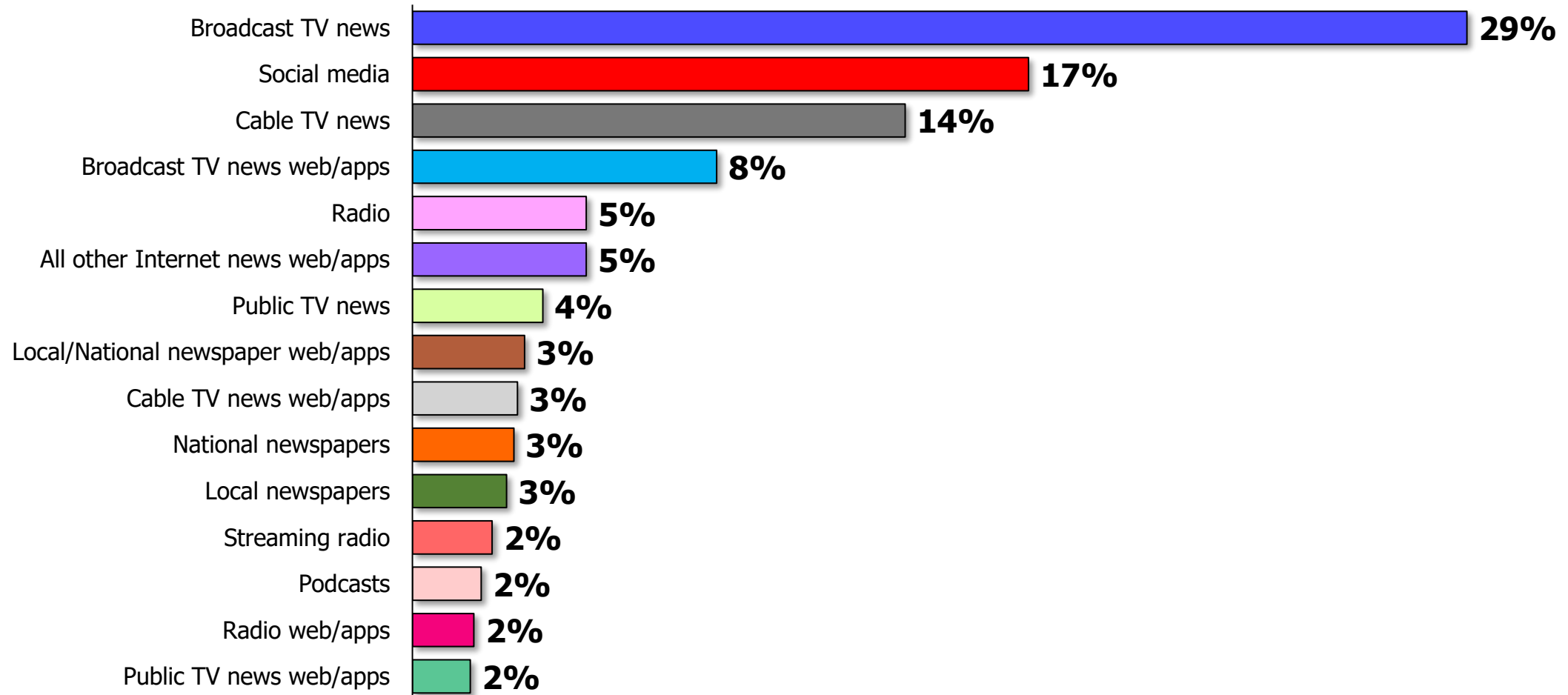
% A18+

■ 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?”

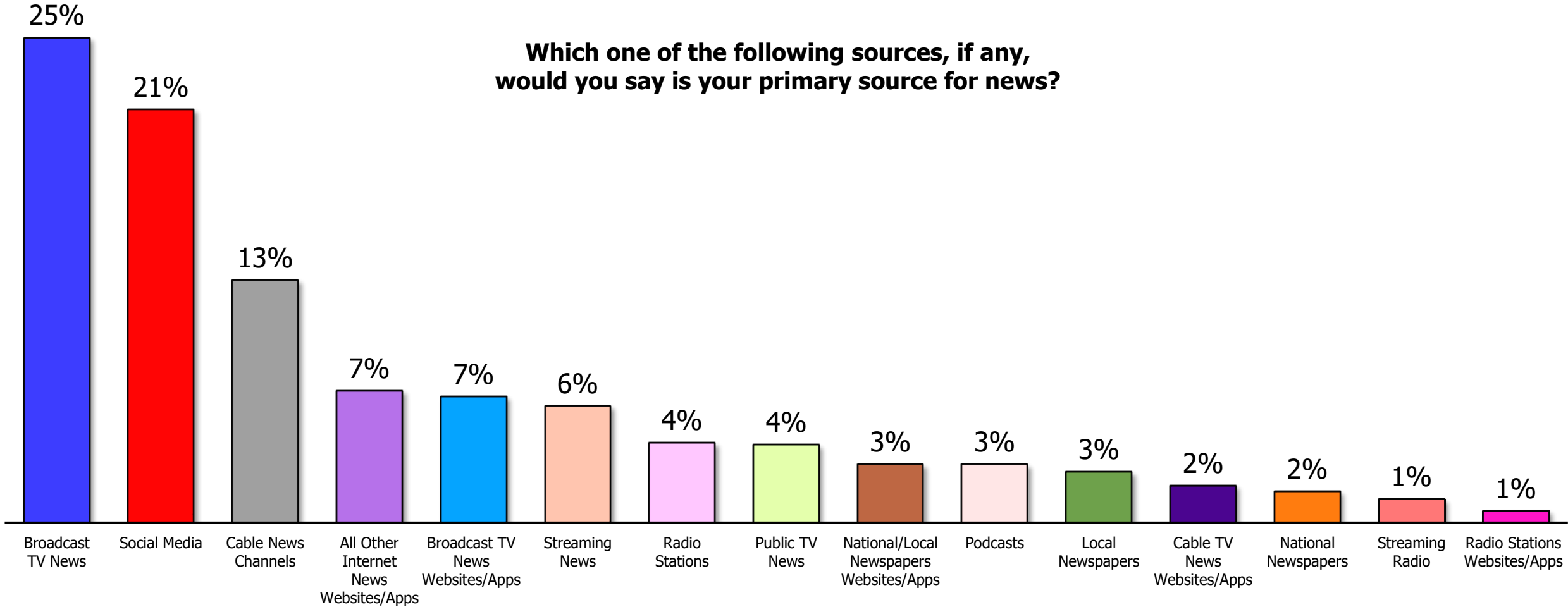


Source: GfK TVB Purchase Funnel 2024 A18+

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

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?

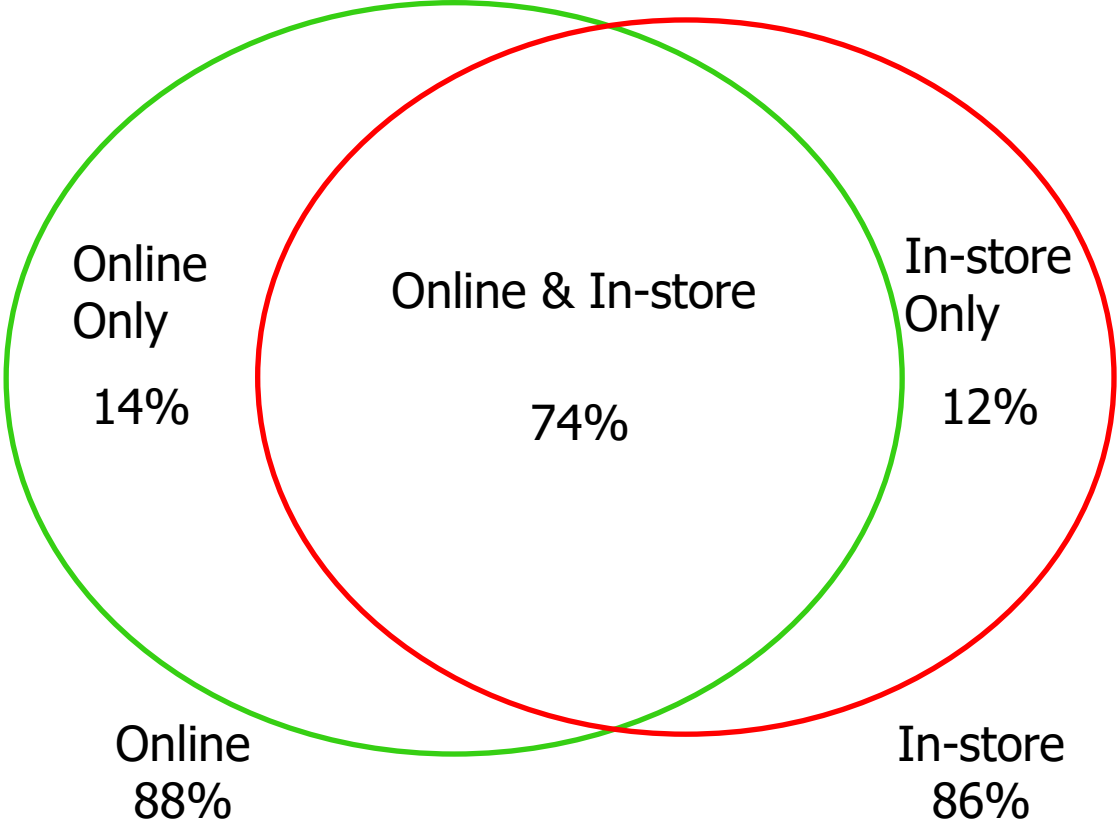
Broadcast TV News & Broadcast TV News Websites/Apps include local TV station & broadcast network telecasts and websites/apps for news/weather/sports.

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

Regardless of How Consumers Shop,
TV Advertising is Key

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

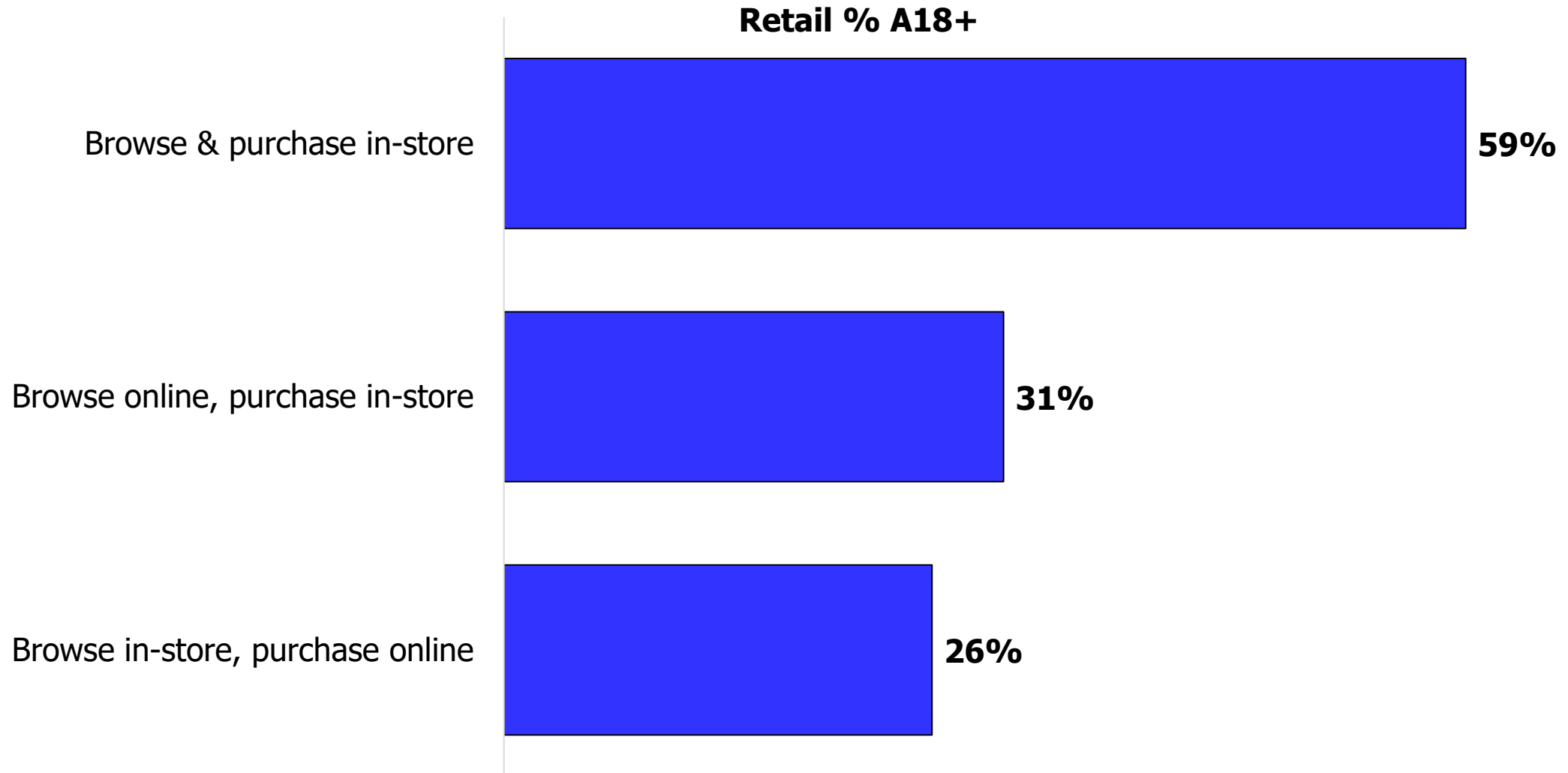
Retail Online = Online Only + Online & In-store
Retail In-Store = In-Store Only + Online & In-store



Source: GfK TVB Purchase Funnel 2024 A18+: Retail
CI-2: "Now, please think about the holiday season. Have you purchased, or do you plan to purchase from the following?"

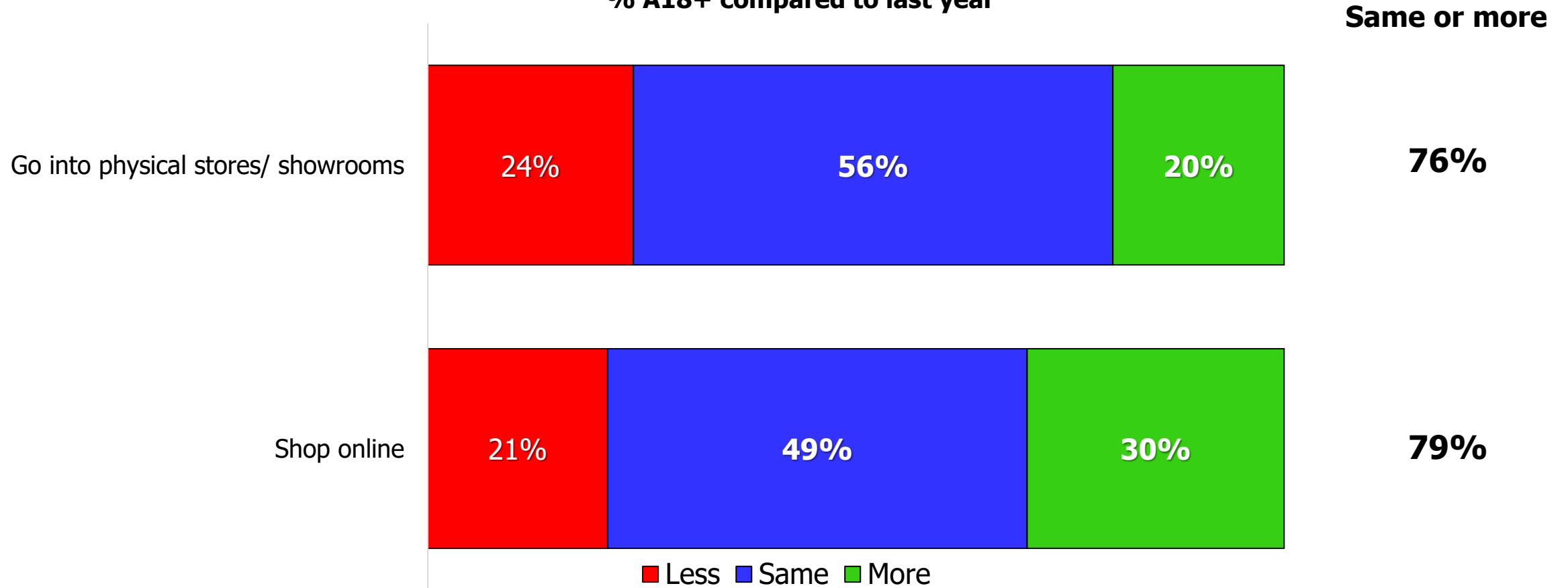
Holiday Season: Shopping Activity At Retail Locations

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



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

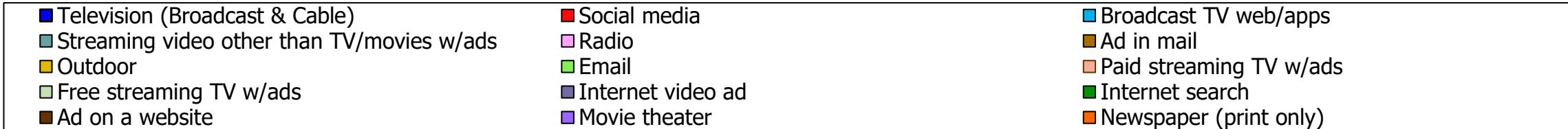
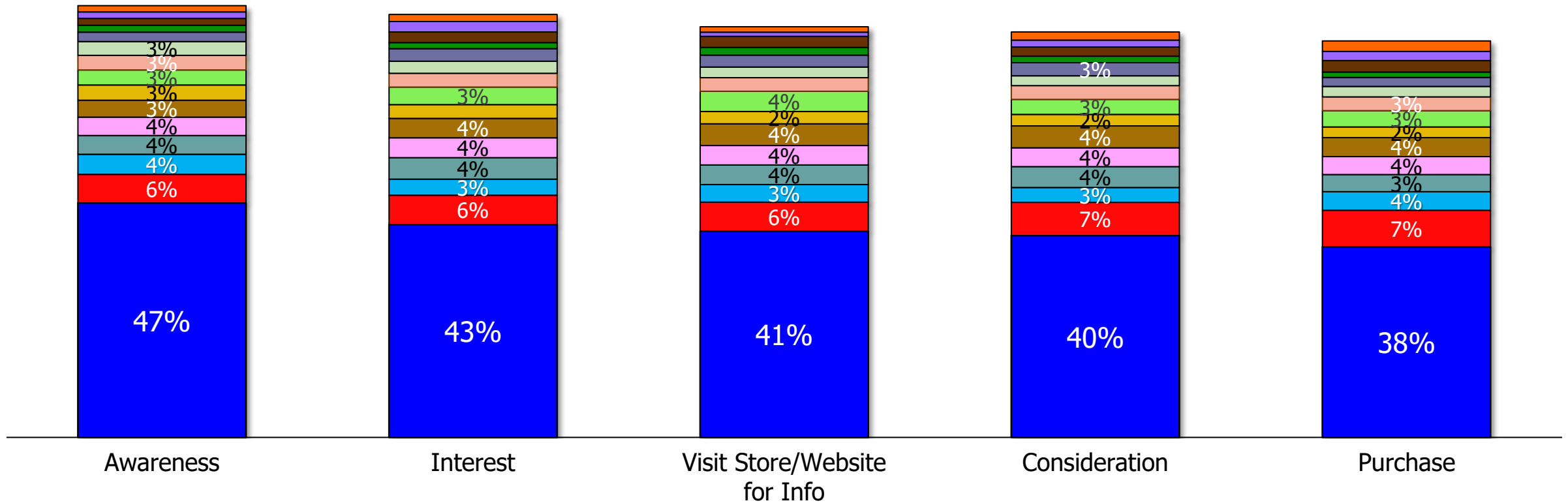
Retail
% A18+ compared to last year



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

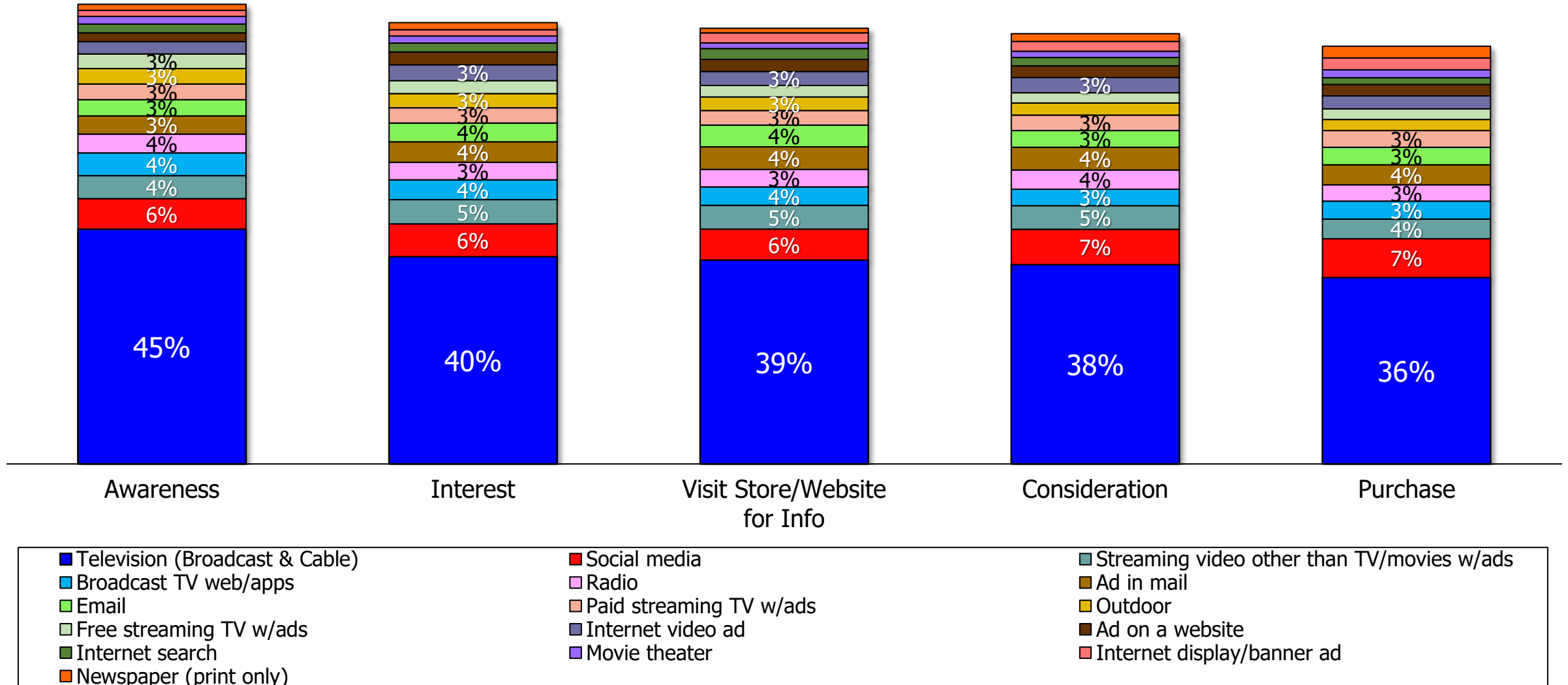
In-store Retail



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

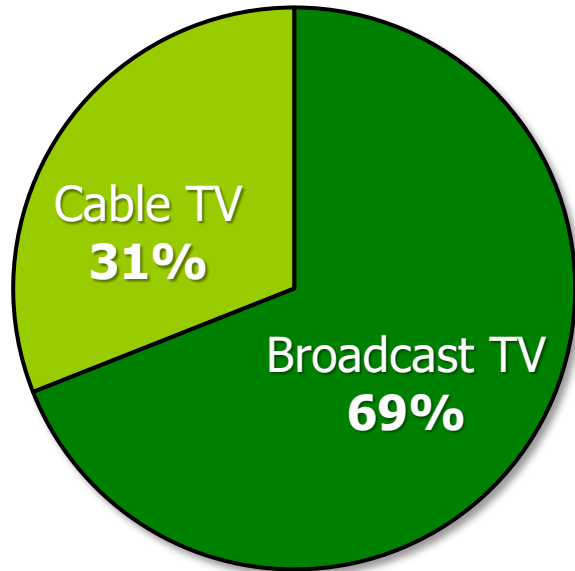
Online Retail



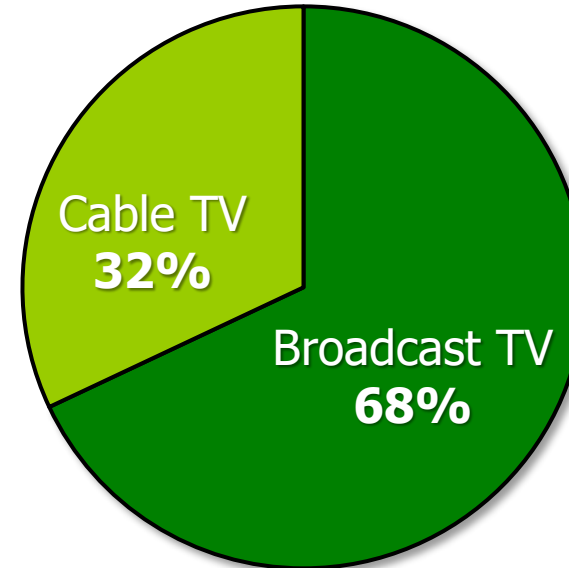
Source: GfK TVB Purchase Funnel 2024 Online retail Category A18+
 QA4/QA5/QA6/QA7/QA8 Most important for media with at least 1 funnel stage at 2%+ shown; 2%, 1%, & 0% not shown/labeled.

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

In-Store Retail



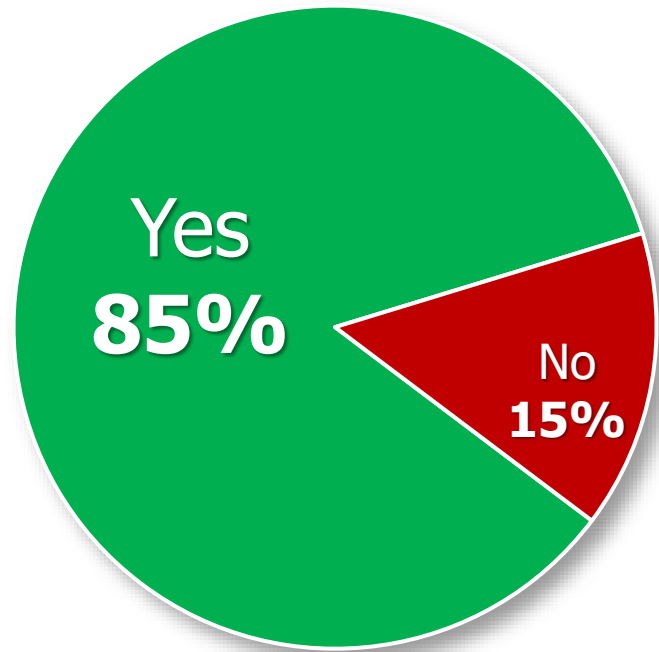
Online Retail



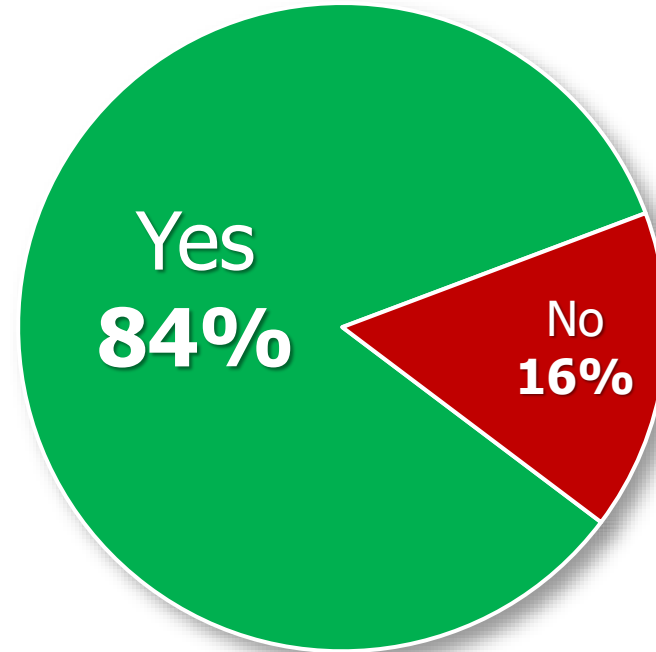
Source: GfK TVB Purchase Funnel 2024 In-store & Online retail category A18+
QA4 "Thinking about the ads you saw/heard for the categories, which advertising media made you most aware of the category?"
How to read: Of those who chose television as most important for awareness, 68% chose broadcast TV.

“Have TV ads influenced your search selections?”

In-store Retail
% A18+ Who do online searches



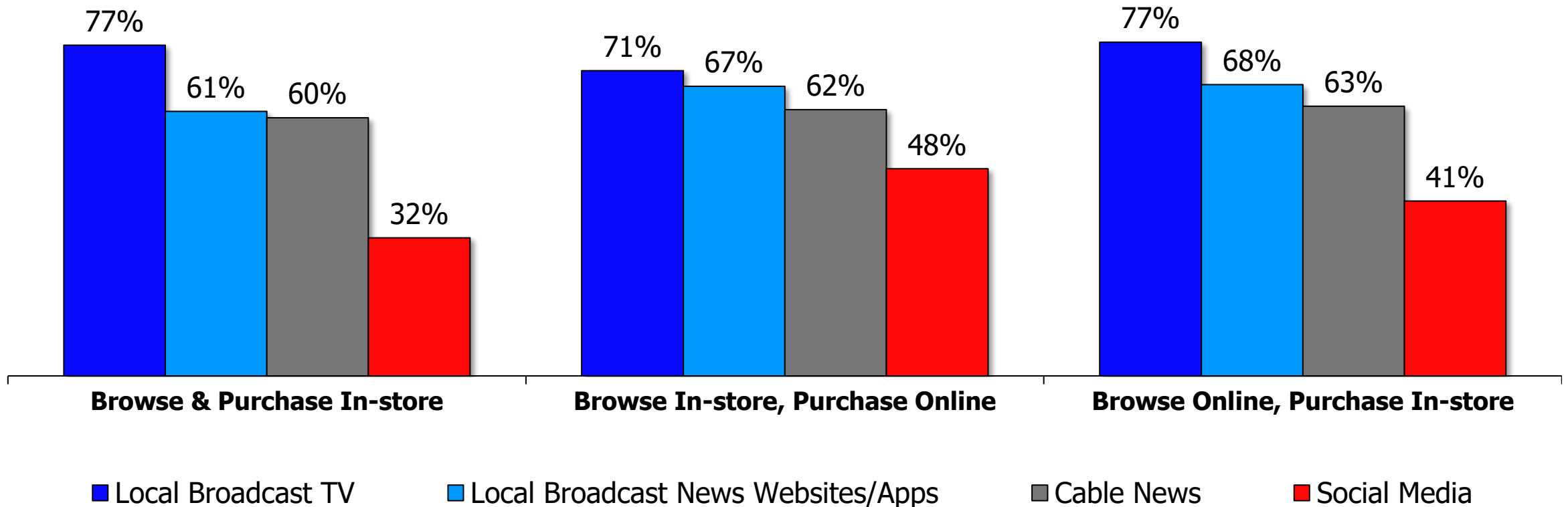
Online Retail
% A18+ Who do online searches



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).

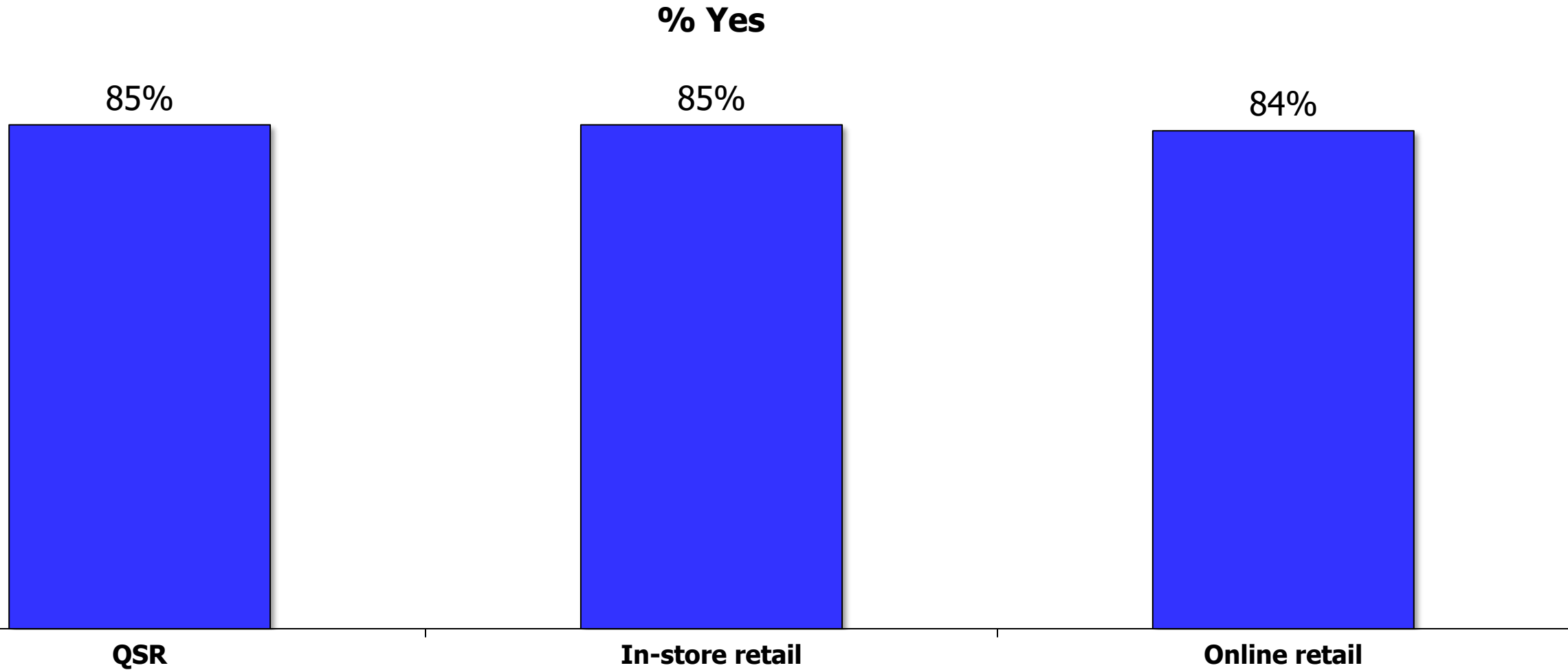
Regardless of Physical Retail Methods, Shoppers Highly Trust Local TV Assets

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).

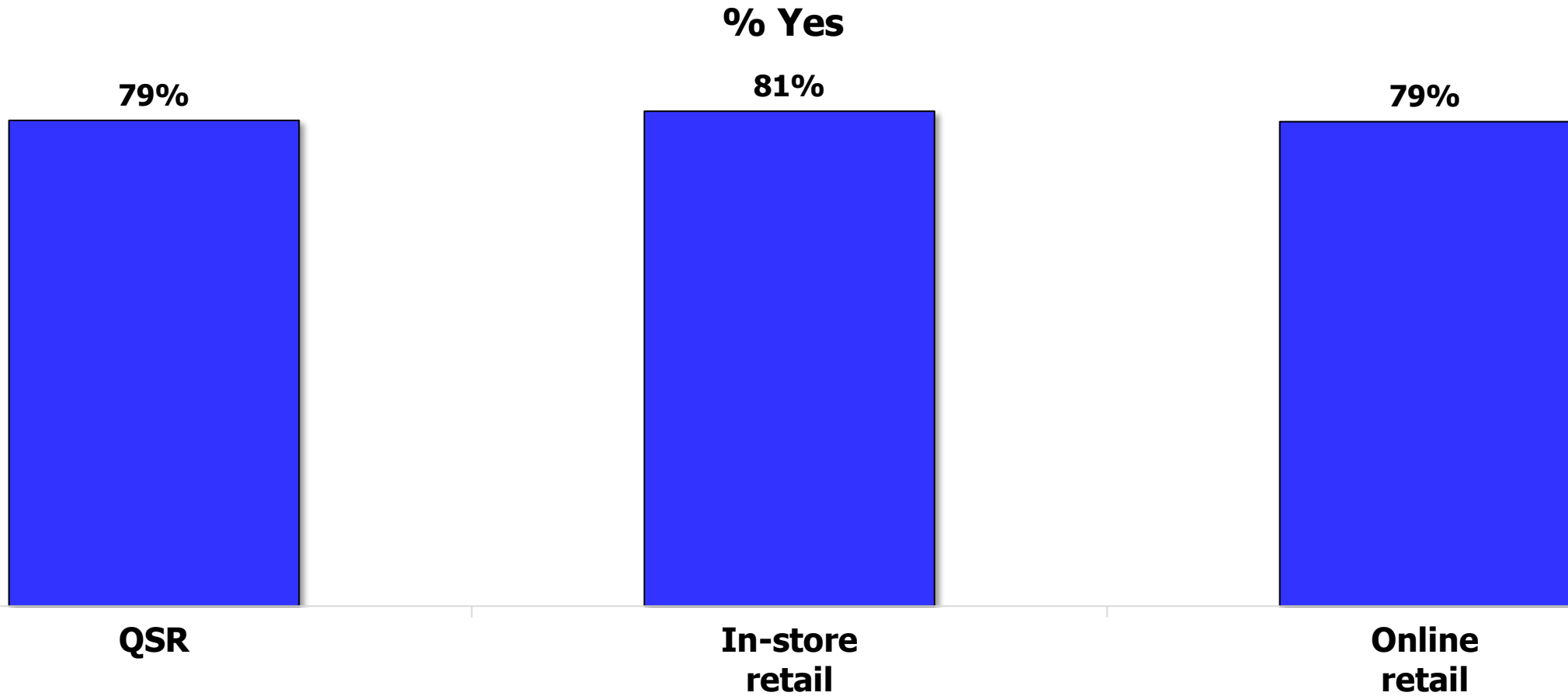
“Have TV ads influenced your search selections?”



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)

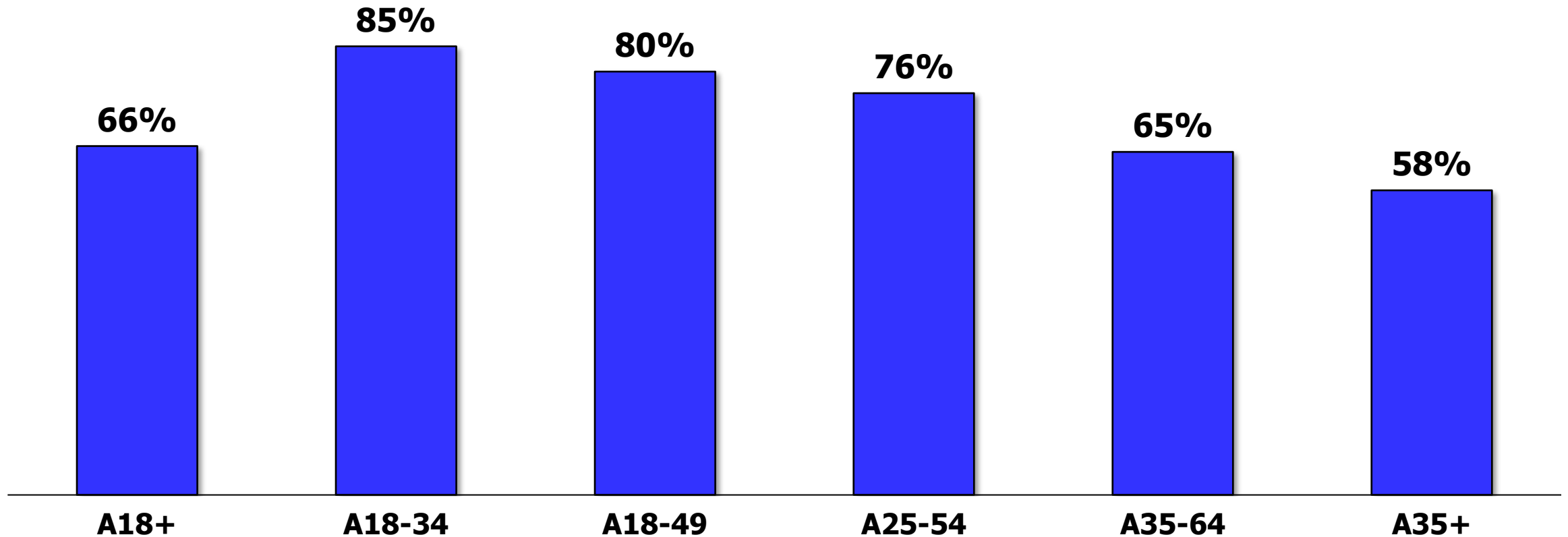
“When visiting a television station’s website or app, do you view the ads?”



TV Motivates Key Demos, Especially Younger Adults

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

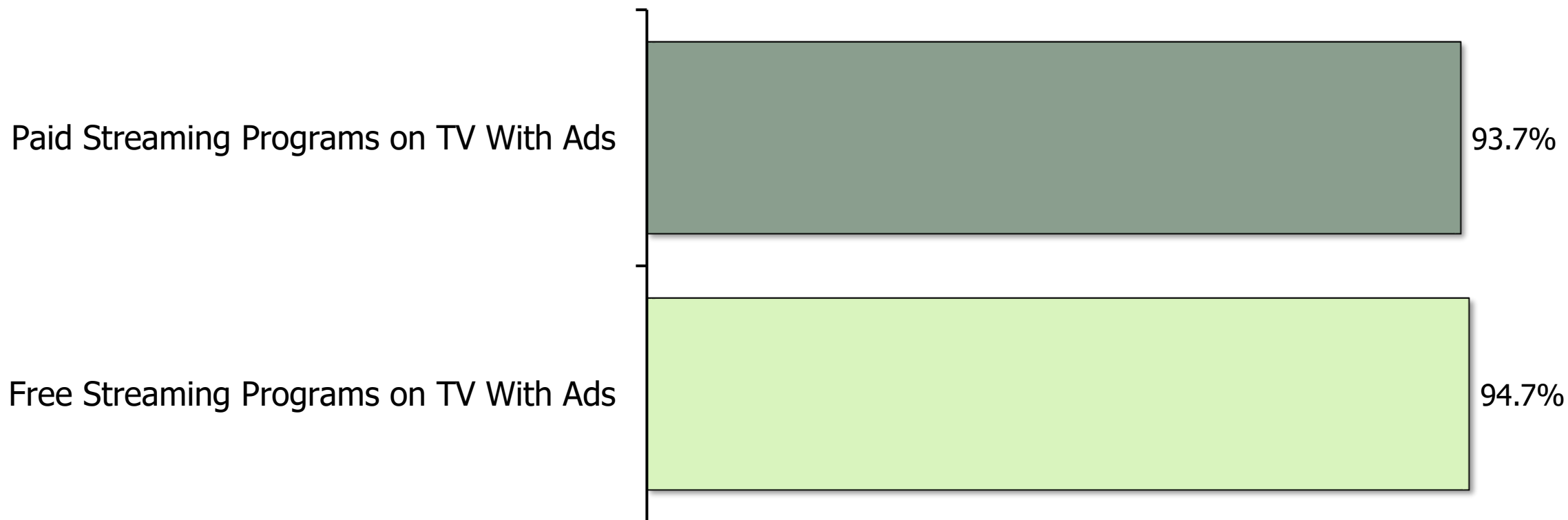
Any Action



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

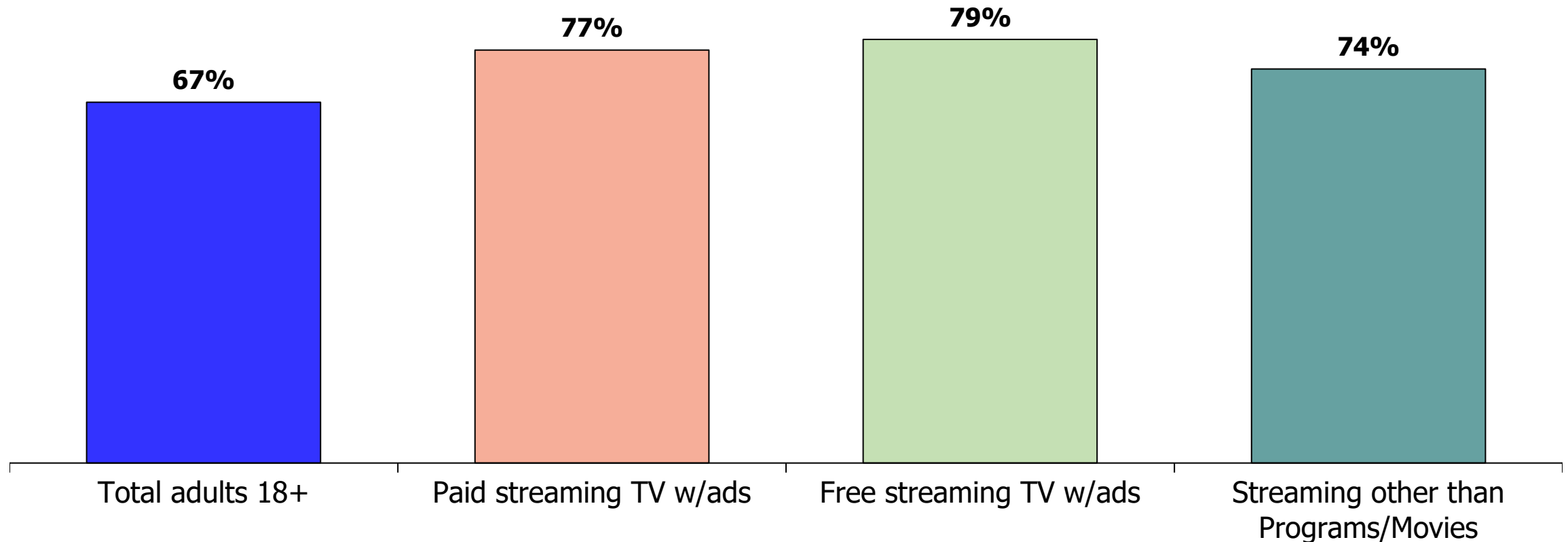
Percent of Each That Are Reached by Broadcast TV



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

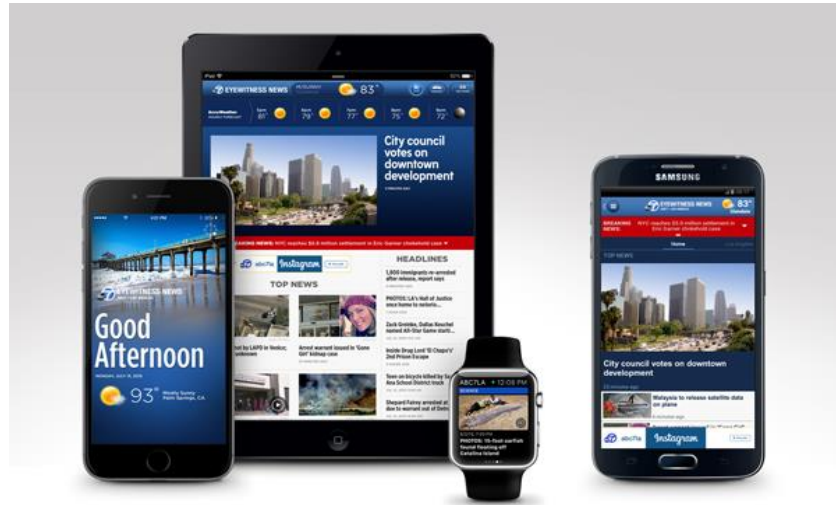
A Higher Proportion of Streamers Are Exposed to Linear TV Than the Average Adult 18+ Respondent

% Exposed to Linear TV Ad (Broadcast/Cable)



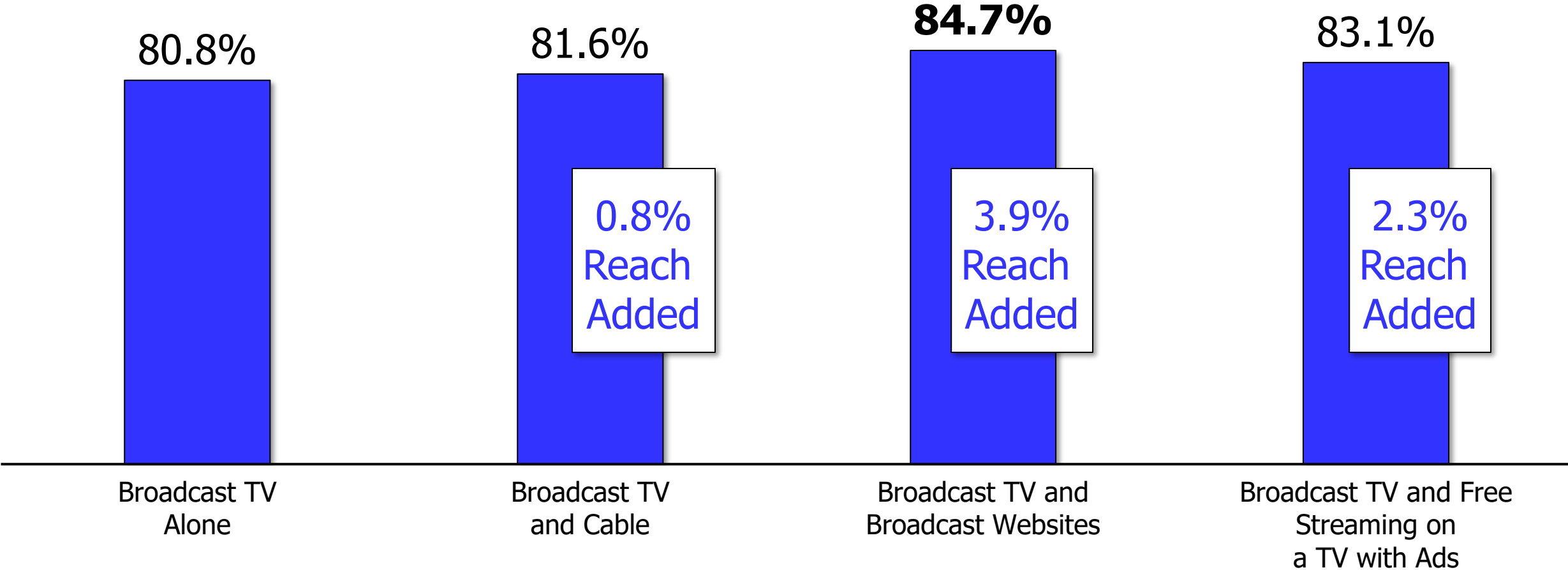
To be read as: Looking at those exposed to free streaming with ads (FAST,AVOD) as their own universe, 79% are also exposed to Linear TV advertising.

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

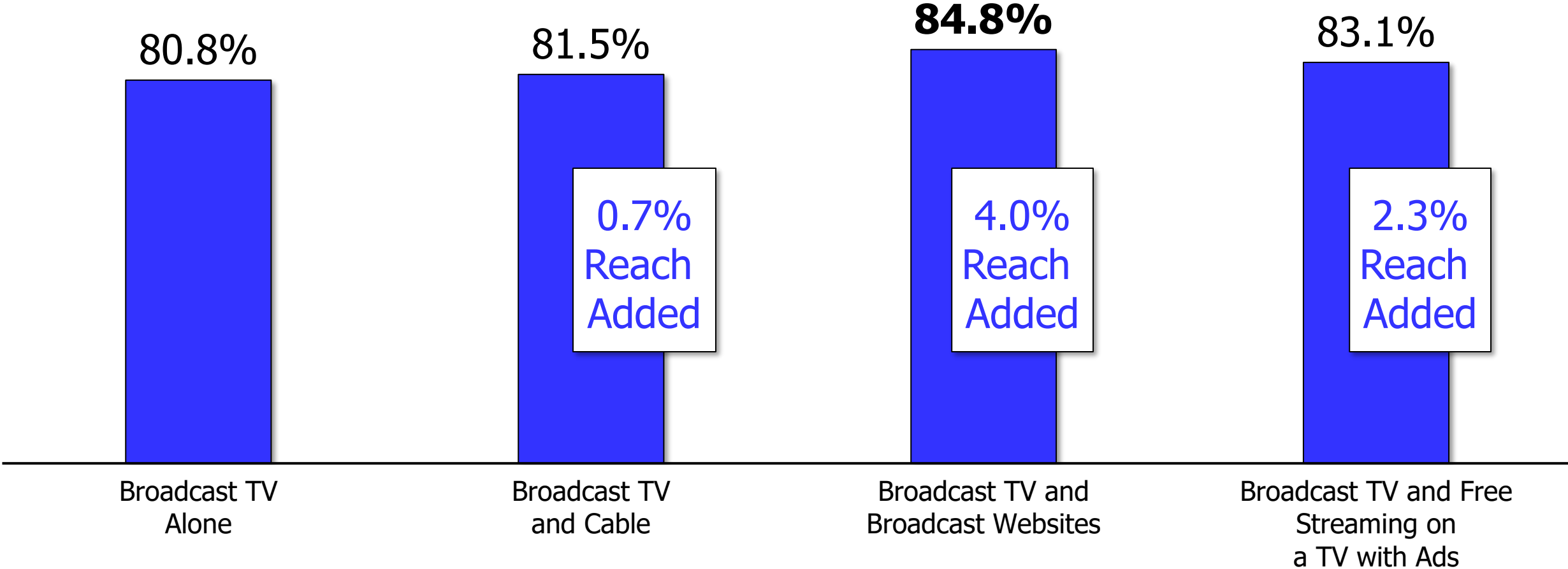


Source: GfK TVB Media Comparisons Study 2024. M-S 4A-2A. Persons 18+ Shopped in-store in the past year.



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

A18+ Shopped online in the past year



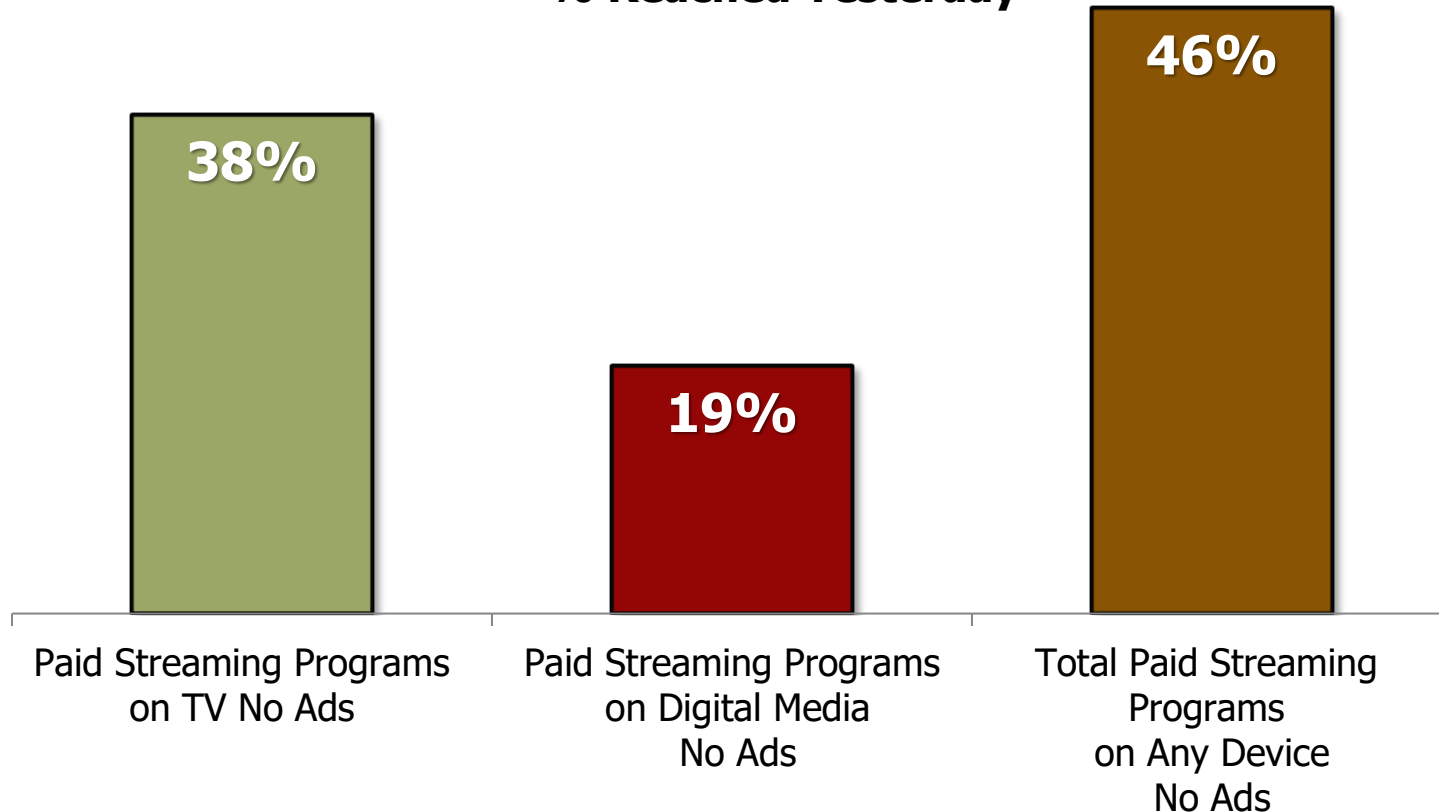
Source: GfK TVB Media Comparisons Study 2024. M-S 4A-2A. Persons 18+ Shopped online in the past year.



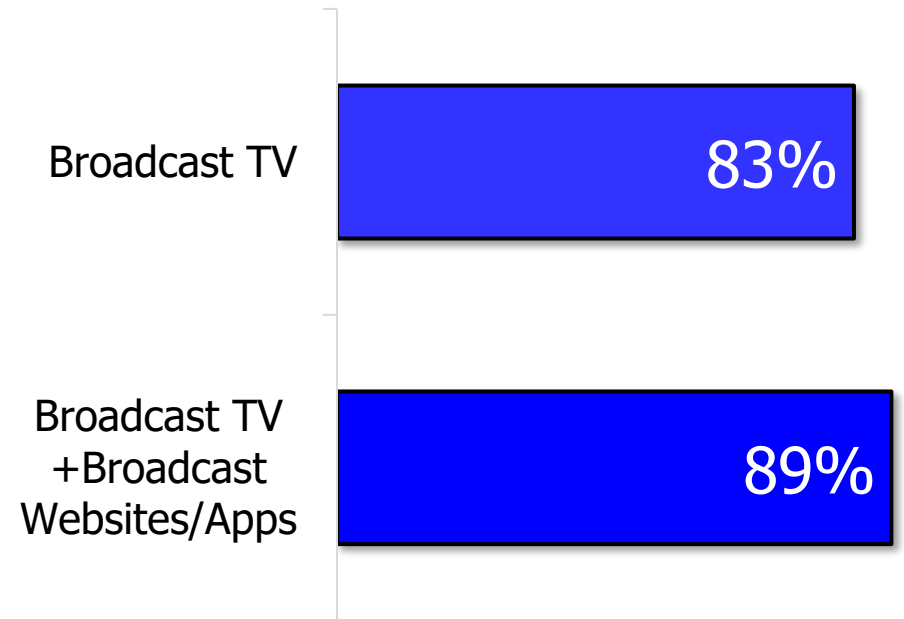
Broadcast TV Assets Can Reach Those Who Stream Programming on Ad-Free Platforms

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

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

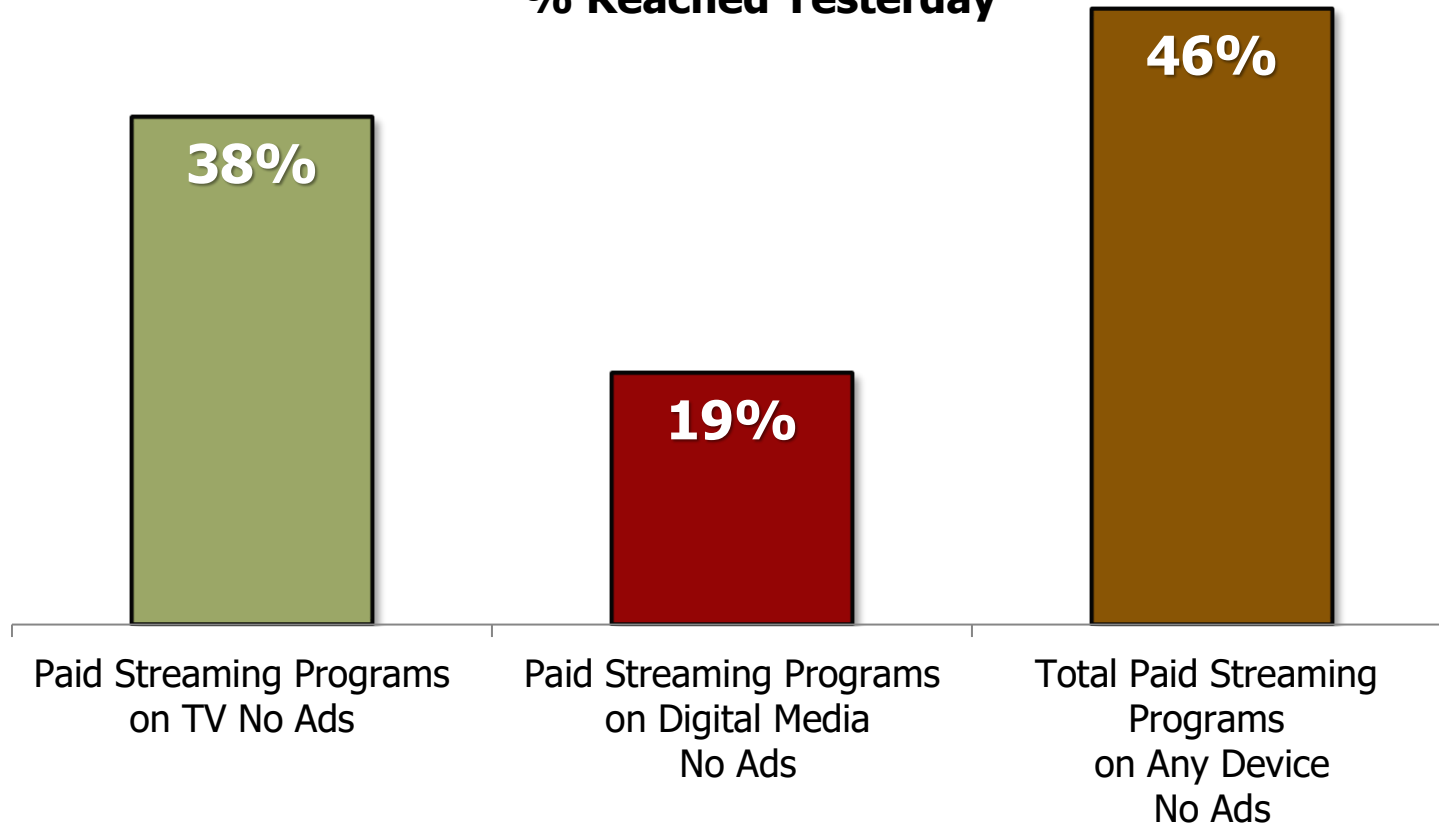


**In-Store Retail Shoppers
% Reach of Streamers with No Advertising**

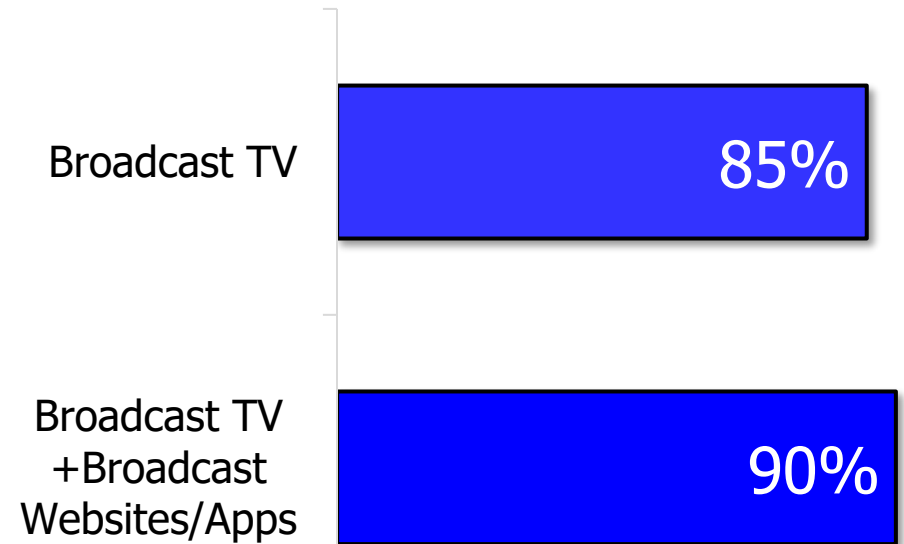


Streaming with NO Advertising: Advertisers Cannot Reach these Viewers But Broadcast Assets **Can** Reach Most of Them

**Online Retail Shoppers
% Reached Yesterday**



**Online Retail Shoppers
% Reach of Streamers with No Advertising**



Key Mother's Day Takeaways

- 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

TVB Local
Media
Marketing
Solutions