UPDATED August 2023

TV advertising's ultimate nickable charts

What every marketer should know

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1. Who is Thinkbox?

Thinkbox is the marketing body for commercial TV in the UK, in all its forms. It works with the marketing community with a single ambition: **to help advertisers get the best out of today's TV.**

Main shareholders

Associates & supporters

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Why nick these?

You probably already have plenty of charts in your life, so why do you need these?

Well, if you work in marketing, these are essential.

Whether you're working on a pitch, looking for facts to share with colleagues, want to know what TV can now do, or just really enjoy charts, this deck is for you.

It's packed with insight and evidence, from the facts about our transforming TV viewing to the latest on how and why TV advertising works.

It covers lots of ground but with a single purpose: to give you the proof of why TV advertising is so valuable and vital to businesses of all shapes and sizes – more so now than perhaps ever.

If you want to nick even more charts or have any questions, please get in touch with us at research@thinkbox.tv

In this deck…

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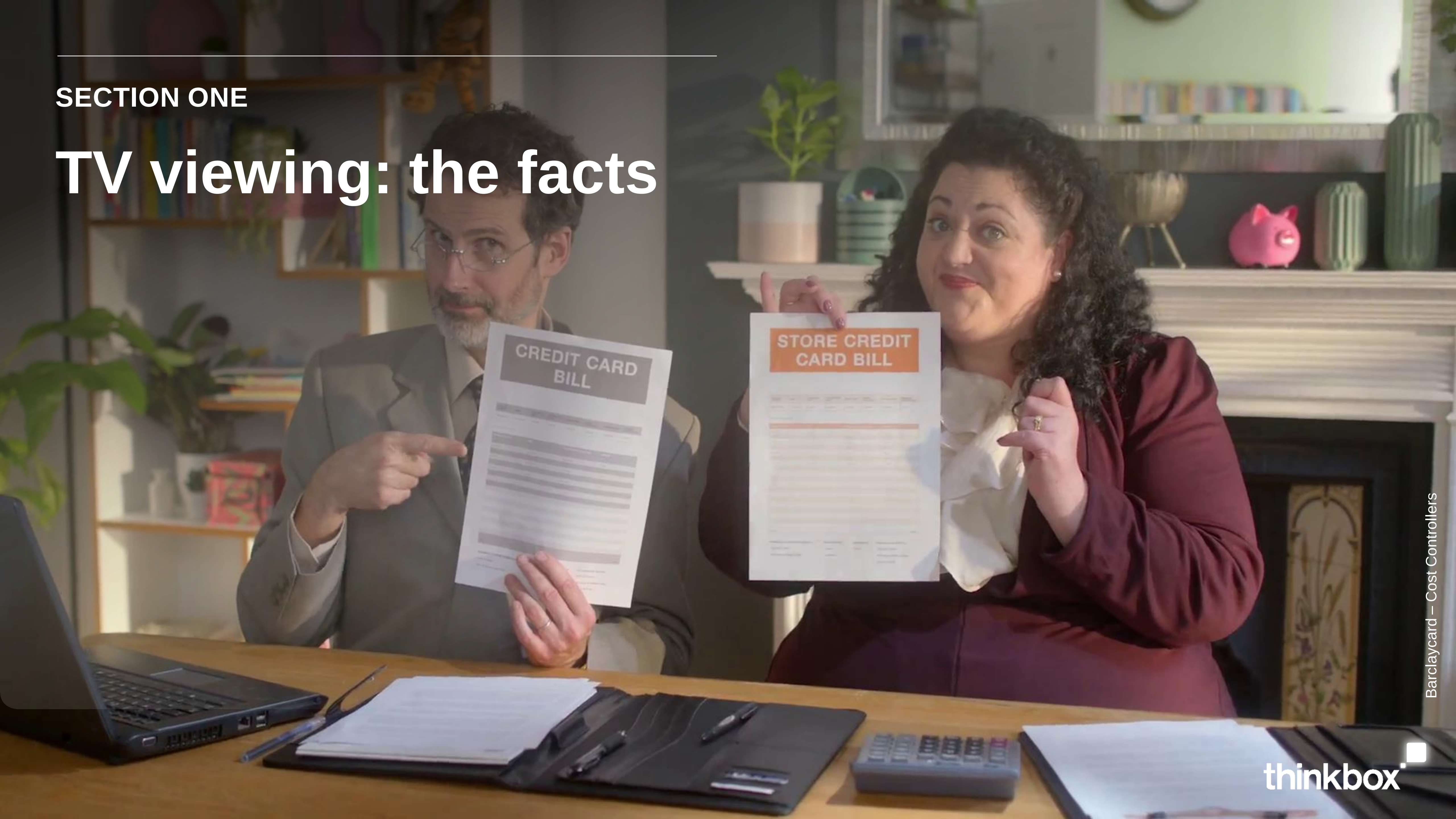
SECTION ONE

TV viewing: the facts



Barclaycard – Cost Controllers

Summary –
TV Viewing: the facts

- In 2022, we watched **2h, 41m** of broadcaster TV each day.
- BVOD represents **28%** of all broadcaster TV viewing for 16-34s
- TV advertising accounted for **84%** of the video advertising we saw each day in 2022, and **56%** for 16-34s.

Sources: please see notes

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TV viewers have never had it better

— **71.5%** of main TV screens 40” or bigger

— **81%** have access to broadcaster VOD on TV set

Source: Barb, Touchpoints, Thinkbox estimates

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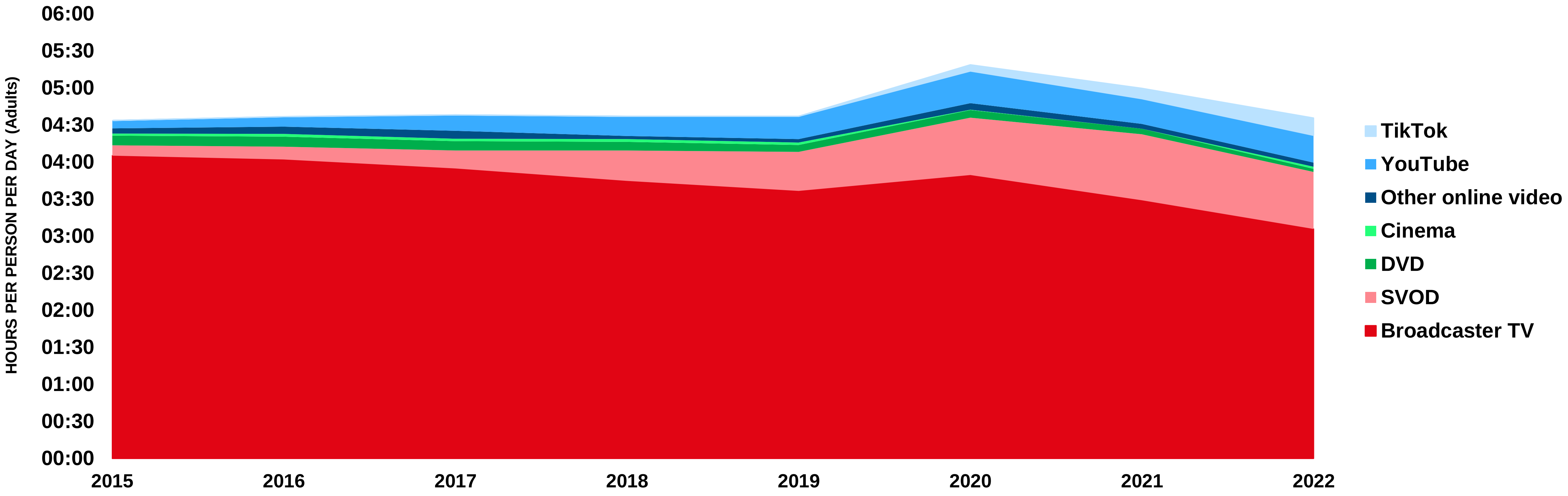
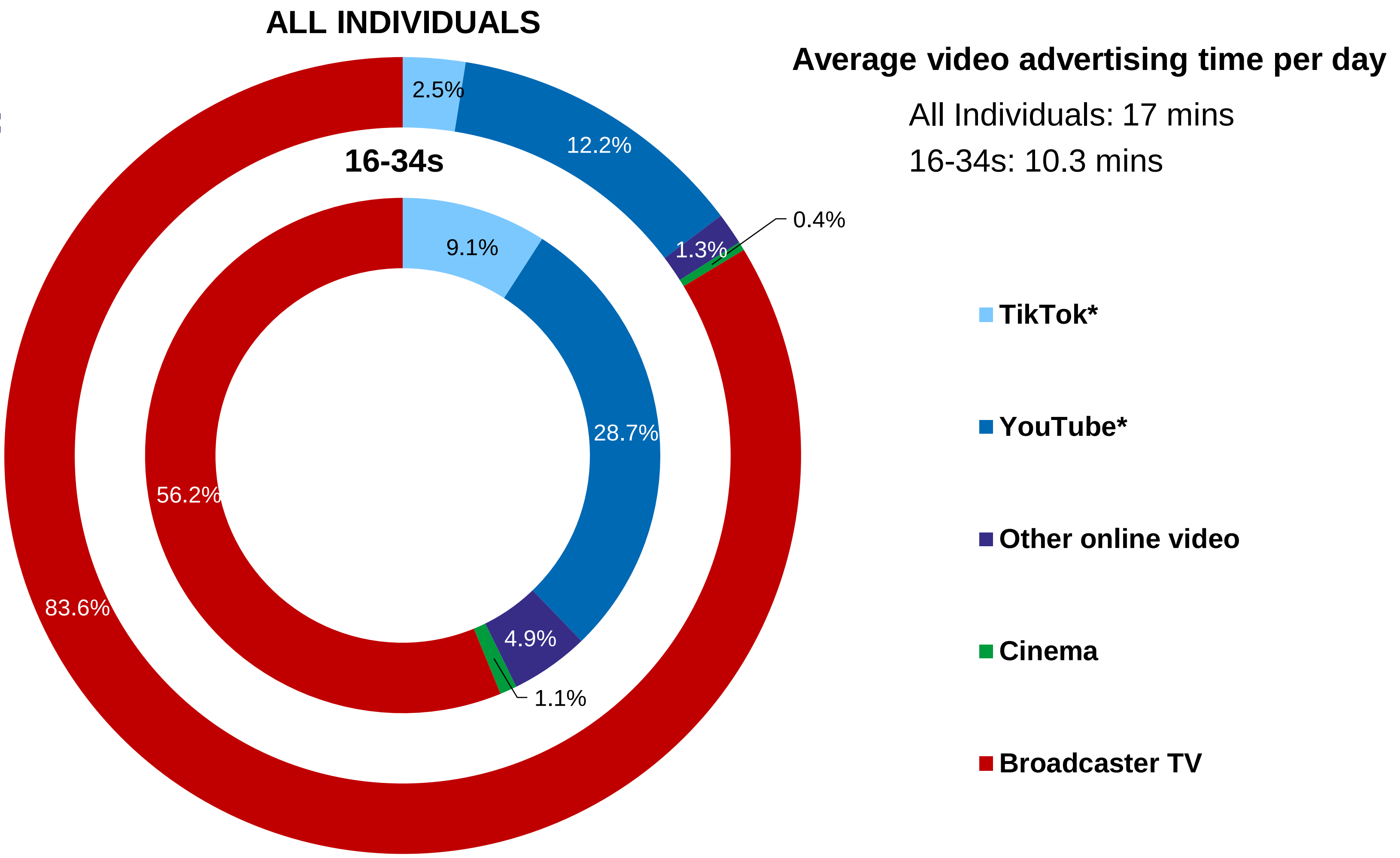
Video viewing has reverted to pre-pandemic levels



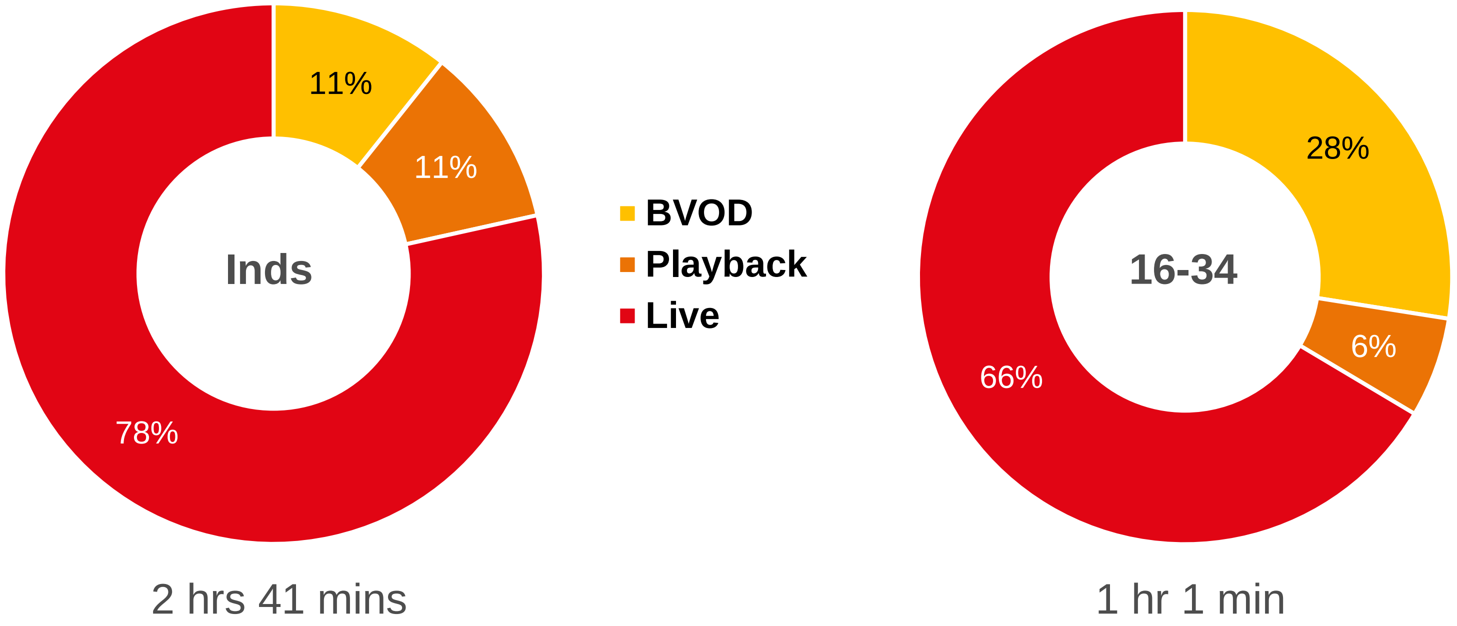
Source: IPA TouchPoints, Adults, Average of Wave 1 and Wave 2 2022, Barb and Broadcaster data

Broadcasters account for 84% of all video advertising



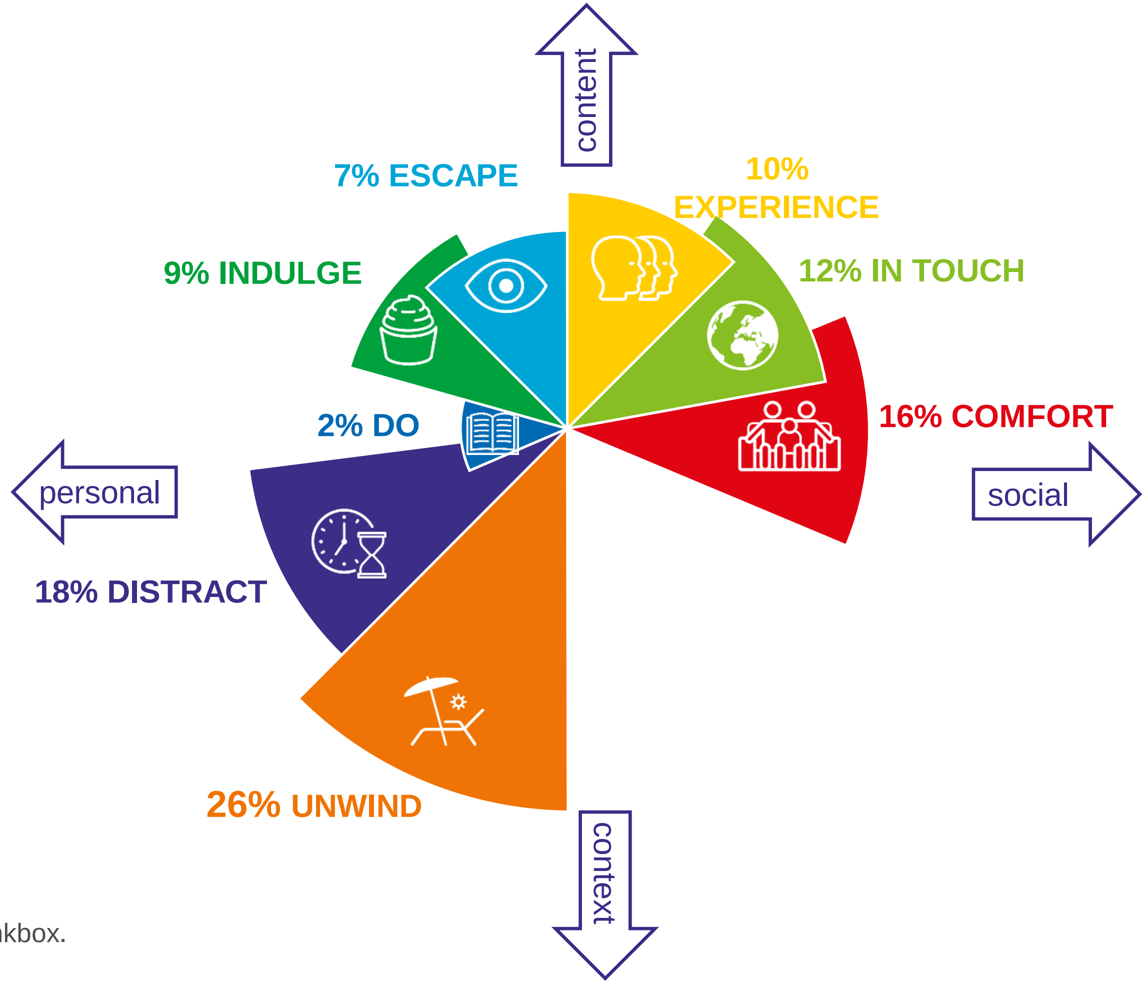
Source: 2022, Barb / Broadcaster stream data / IPA TouchPoints 2022 / UK Cinema Association / ViewersLogic to model OOH viewing time * YouTube ad time modelled at 4.1% of content time, TikTok ad time modelled at 3.4% of content time using agency and broadcaster data, Other online modelled at 4% of content time)

BVOD accounts for over ¼ of 16-34s broadcaster TV viewing



Source: 2022, Barb / Broadcaster stream data

There are 8 need states which drive video viewing



Source: The Age of Television, 2018, MTM/Thinkbox.

Broadcasters deliver the biggest hits

Top 30 series on UK Television 2022 (All Inds 4+, TV set viewing only)					
Rank	Channel	Title	Series	Ave aud (m)	Episodes
1	ITV	I'm a Celebrity... Get Me Out of Here!	22	11.4	22
2	ITV	Trigger Point	1	9.3	6
3	CH4	The Great British Bake Off	6	9.1	10
4	BBC	Strictly Come Dancing	20	9.0	26
5	Netflix	Stranger Things	4	8.8	9
6	ITV	The Thief, His Wife and The Canoe	1	8.7	4
7	BBC	Call the Midwife	11	8.4	8
8	BBC	Death in Paradise	11	8.3	8
9	Netflix	Wednesday	1	8.2	8
10	BBC	Frozen Planet II	1	7.5	6
11	BBC	The Green Planet	1	7.5	5
12	Netflix	Stay Close	1	7.4	8
13	CH4	Gogglebox	19	7.4	16
14	BBC	Strike	6	7.3	4
15	BBC	Silent Witness	25	7.2	6

Top 30 series on UK Television 2022 (All Inds 4+, TV set viewing only)					
Rank	Channel	Title	Series	Ave aud (m)	Episodes
16	BBC	Sherwood	1	7.0	6
17	ITV	Our House	1	6.9	4
18	Netflix	After Life	3	6.9	6
19	BBC	Shetland	7	6.8	6
20	ITV	Britain's Got Talent	15	6.8	14
21	BBC	The Apprentice	16	6.7	14
22	ITV	The Masked Singer	3	6.7	8
23	ITV	Grace	2	6.6	4
24	BBC	Peaky Blinders	6	6.6	6
25	ITV	The Club	1	6.4	8
26	BBC	The Tourist	1	6.4	6
27	ITV	Bradley Walsh & Son: Breaking Dad	4	6.3	6
28	ITV	Ant and Dec's Saturday Night Takeaway	18	6.3	7
29	ITV	Ridley	1	6.3	4
30	ITV	McDonald and Dodds	3	6.0	4

Source: Barb, 2022, individuals. Average audience figures. Consolidated 1-28 days, excludes one-offs, films and sports

SECTION TWO

TV is a trusted & safe environment for brands

Carwow - Snip

Summary –
TV is a trusted & safe environment for brands

— TV's hidden value includes high value exchange, strong costly signals and high attention levels.

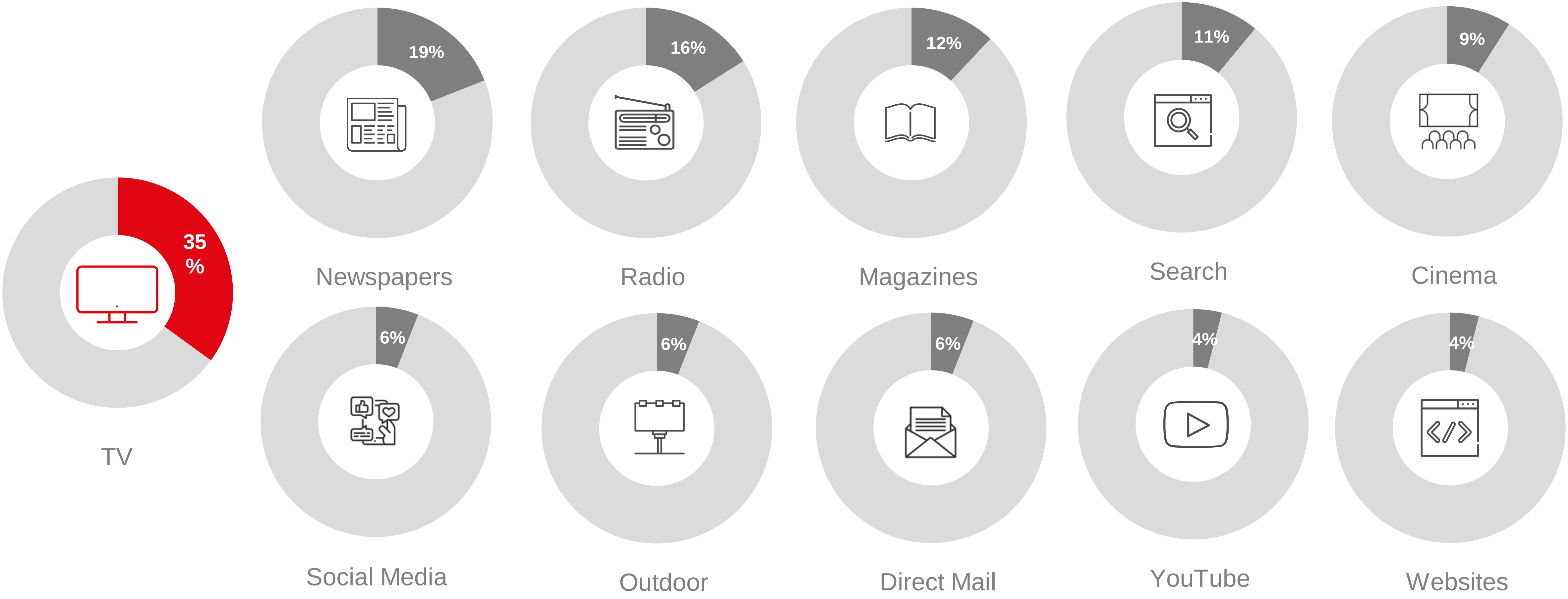
— TV ads were most trusted by the UK public (35%)

Sources: please see notes

TV's hidden value

High value exchange	Big screen
Shared viewing	High attention levels
Strong costly signals	High completion rates
Trusted	Bot free
Not perceived to be targeted	Regulated / Ad clearance

TV advertising is seen as most trustworthy



Source: Adnormal Behaviour, 2022, Ipsos / Thinkbox. Q.TN3: In which, if any, of the following places are you most likely to find advertising that...you trust
Base: 'normal' people (1,158)

SECTION THREE

TV: the most effective advertising

LG – Light Up Your World

Summary – TV: the most effective advertising

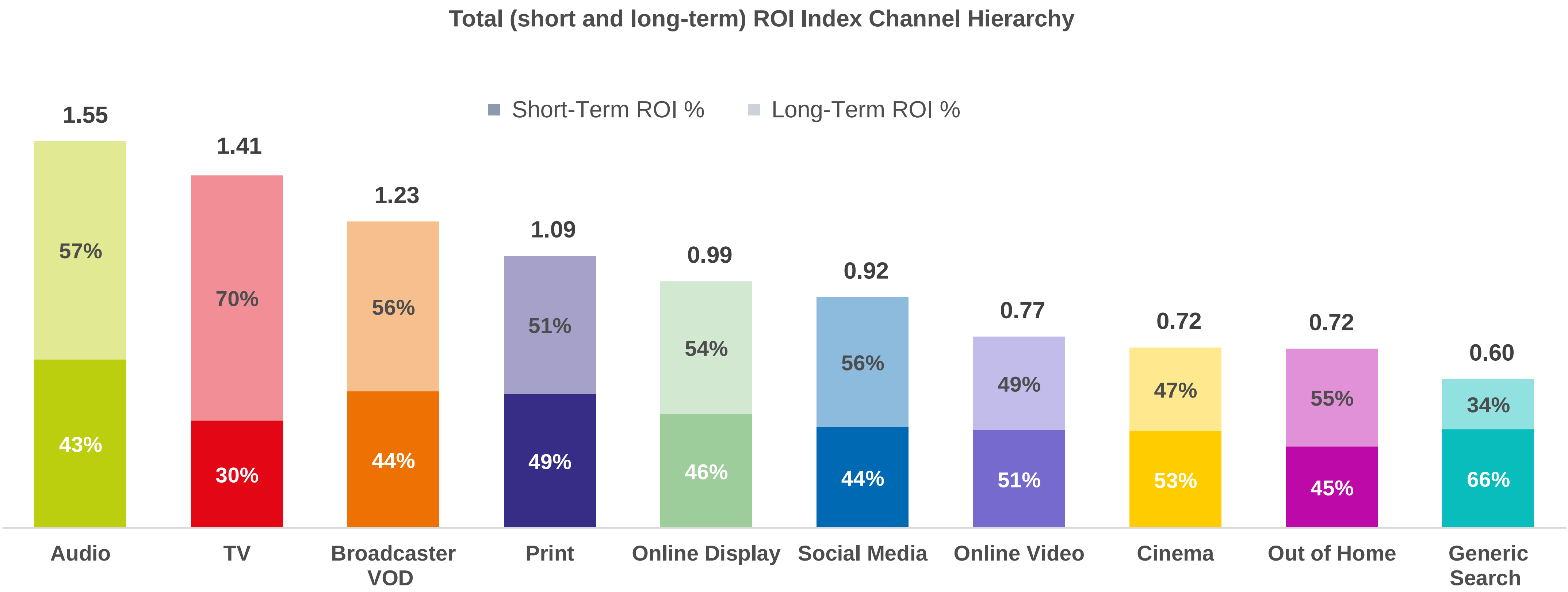
— TV boosts effects of other ad channels by up to **54%**

— The optimal budget mix varies by sector with TV often commanding the lions share

— TV constitutes on average **66%** of smaller brands media budget but returned **80%** of all ad-generated sales

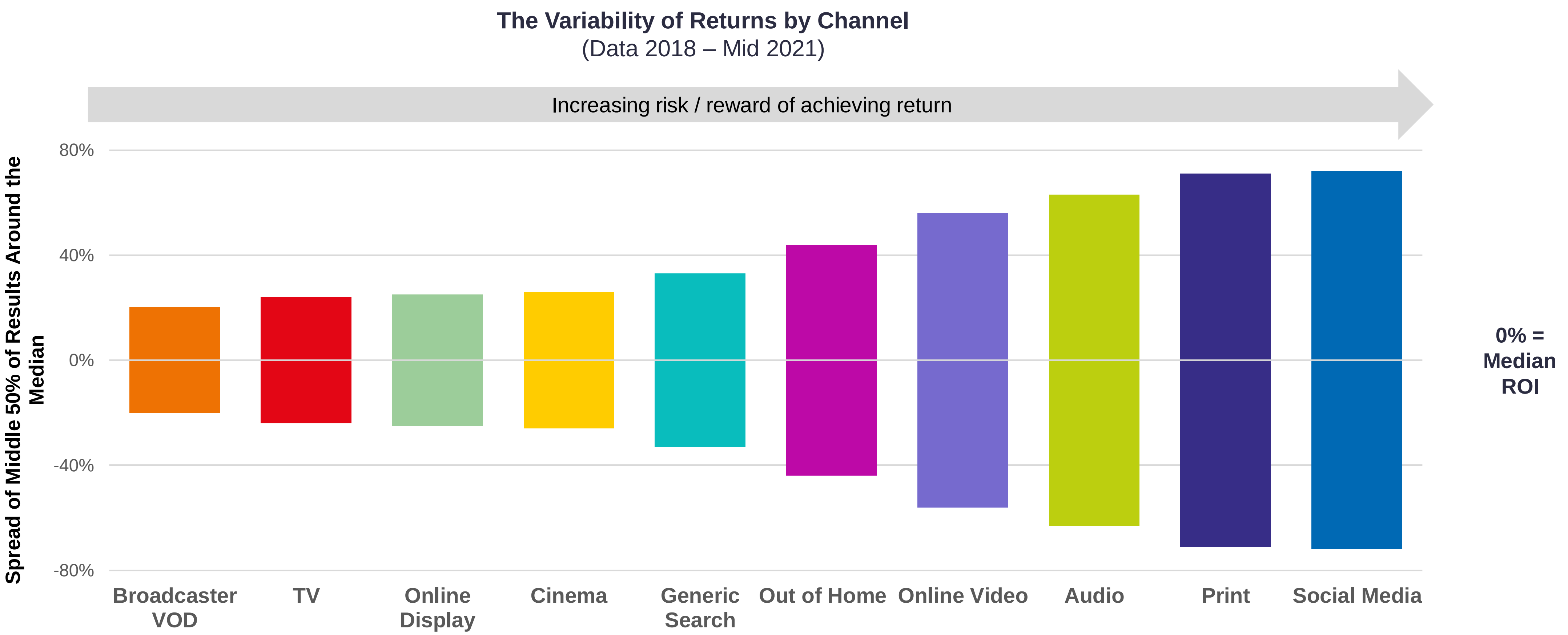
Sources: please see notes

Linear TV and BVOD both deliver strong ROI performance



Source: Media Mix Navigator, Sept. 2022, EssenceMediacom / Wavemaker / Mindshare / Gain Theory

BVOD and Linear TV are the least risky media channels



Source: Media Mix Navigator, Sep. 2022, EssenceMediacom / Wavemaker / Mindshare / Gain Theory

TV boosts effects of other ad channels by up to 54%

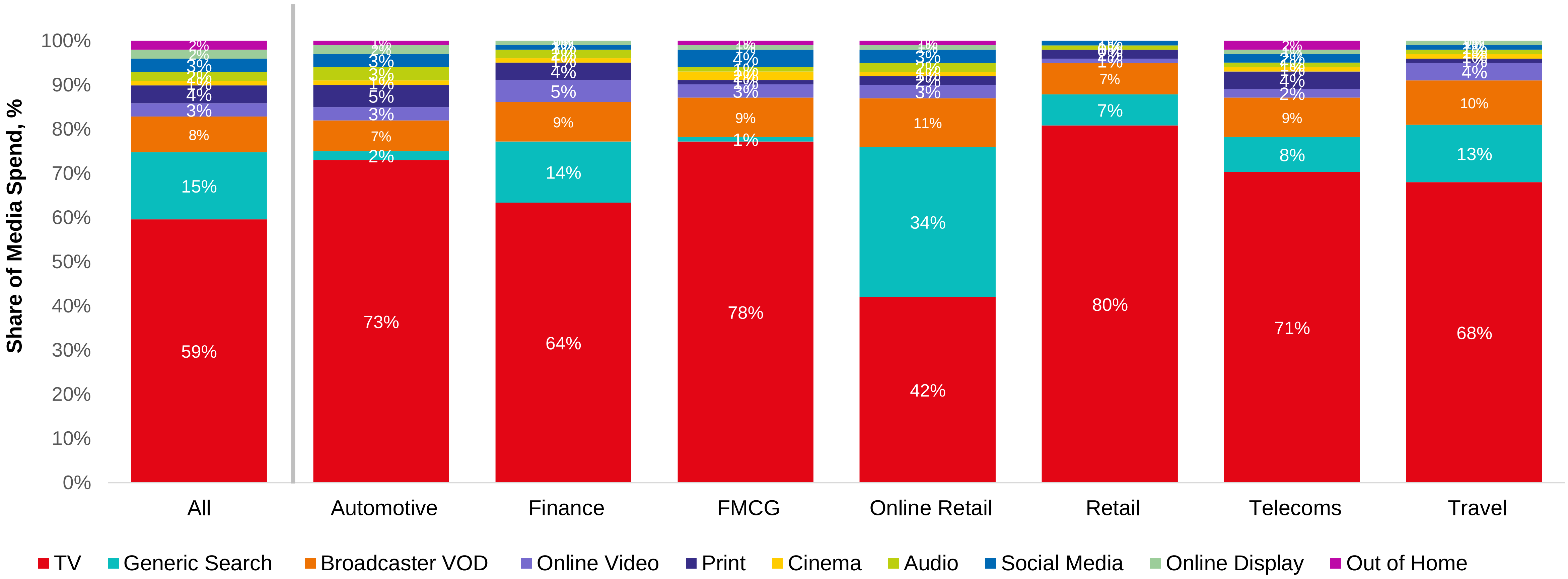
Channel Benefiting from the Effect

Channel Generating the Effect	TV	Online Video + VOD	Social Media	Online Display	Out of Home	Radio	Print	Generic Search	Cinema	Direct Mail
TV		20%	31%	31%	22%	31%	31%	8%	54%	20%
Online Video + VOD	3%		5%	2%	5%	3%	12%	1%	7%	2%
Social Media	2%	2%		2%	3%	2%	3%	1%	3%	1%
Online Display	3%	4%	4%		4%	3%	9%	3%	11%	4%
Out of Home	6%	8%	9%	8%		9%	11%	1%	3%	1%
Radio	4%	4%	4%	6%	4%		3%	2%	1%	1%
Print	5%	6%	7%	5%	6%	4%		4%	13%	7%
Generic Search	3%	2%	4%	2%	2%	3%	7%		*	6%

Key:	0-2%	3-4%	5-8%	9-20%	20%+

Source: 'Demand Generation' Nov 2019, MediaCom/Wavemaker/Gain Theory/Thinkbox
NB: Insufficient data to robustly report Cinema & Direct Mail's effect on other channels. *insufficient data to report effect

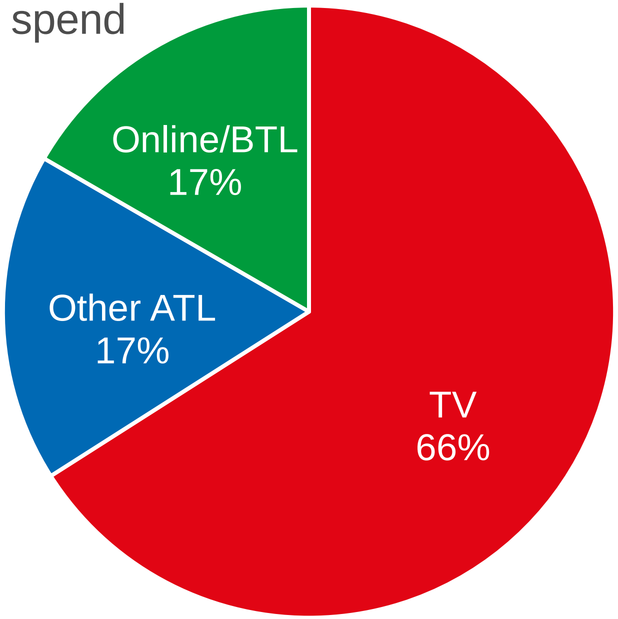
Optimal budget mix varies by sector – TV has the largest share



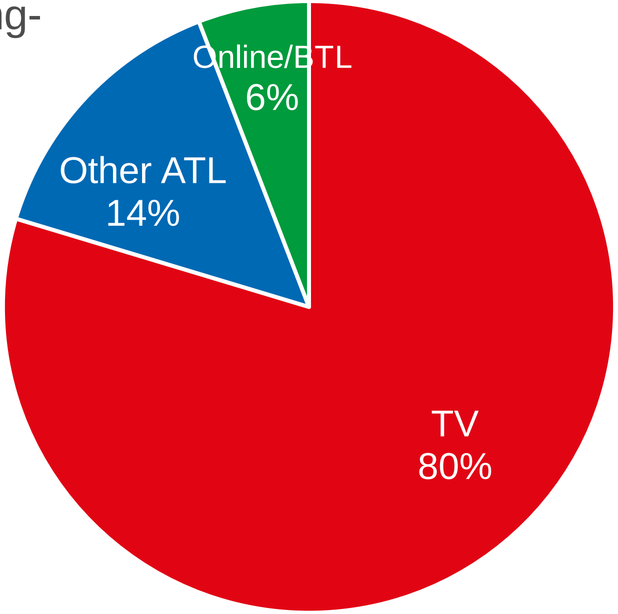
Source: 'Media Mix Navigator' Sep 2022, EssenceMediacom / Wavemaker / Gain Theory / Thinkbox
NB: Channels with sufficient sector level benchmarks only. 11-20% online sales (online retail 100%), low risk tolerance, further details for each category is included in the notes

TV delivers greater sales versus spend for smaller brands

Share of spend



Share of advertising-generated sales



Source: 'As Seen on TV: supercharging your small business', May 2019, Data2Decisions/Work/Thinkbox. Data2Decisions database of smaller brands. All categories.

SECTION FOUR

TV has unbeatable scale and reach

Sonos – Home Theatre

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Summary - TV has unbeatable scale and reach

- Linear TV and broadcaster VOD combined reaches **89%** of the adult population each week
- Adults spend an average **13.2** hours per week watching commercial TV reaching **43 million** individuals
- An average broadcast TV campaign of 400 TVRs in the UK gets **244 million** views

Sources: please see notes

Linear TV and BVOD reaches **89%** of adults each week

Source: IPA TouchPoints 2023, Wave 1 (Fieldwork Dates: 17th January – 26th March 2023). Adults 15+

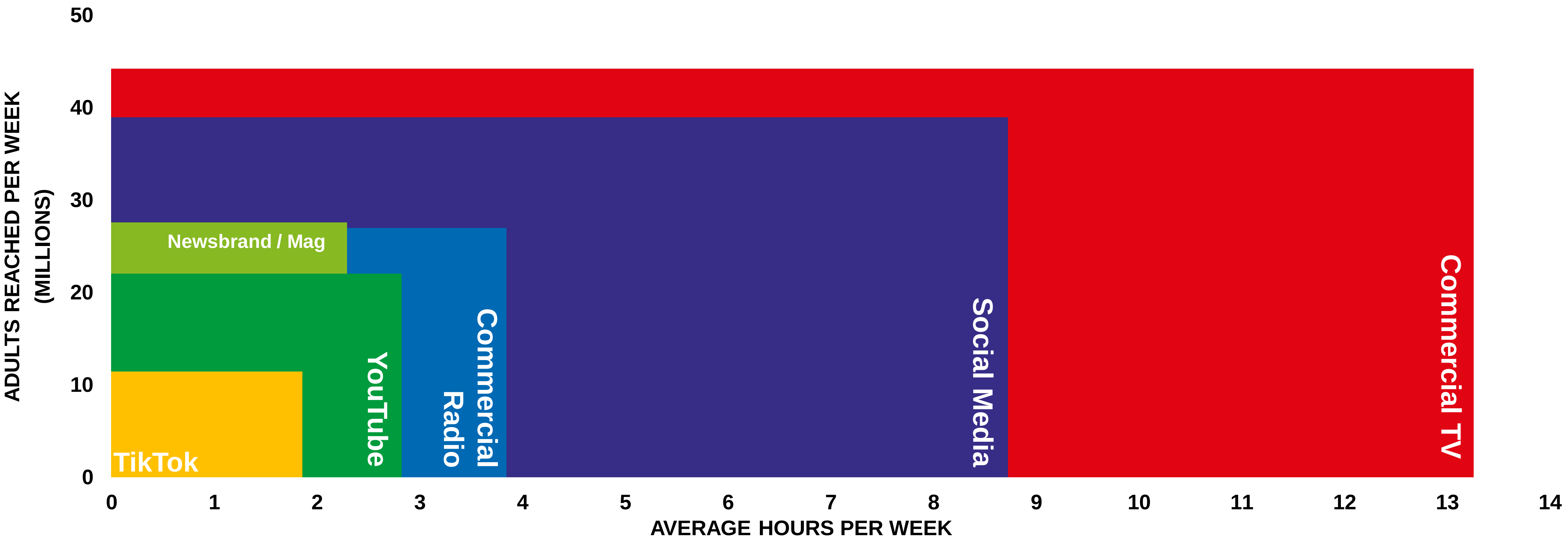
Taskmaster, Channel 4

Total TV weekly reach (linear TV + BVOD)

Weekly Reach %	2019	2020	2021	2022	**2023**
Adults	93	91	91	91	**89**
ABC1 adults	94	91	91	91	**90**
15-34	86	81	81	80	**76**
Men	92	90	90	90	**89**
Women	95	92	91	93	**89**
HP+CH	94	90	90	91	**89**

Source: IPA TouchPoints, 2018 – 2019 , 2020 (average of both waves), 2021 (average of both waves), 2022 (average of both waves), 2023 Wave 1 (Fieldwork Dates: 17th January – 26th March 2023)

Commercial TV delivers scale



Source: IPA TouchPoints 2023, Wave 1 (Fieldwork Dates: 17th January – 26th March 2023). Base: adults 15+. Newspaper/magazine/TV figures include online/app consumption.

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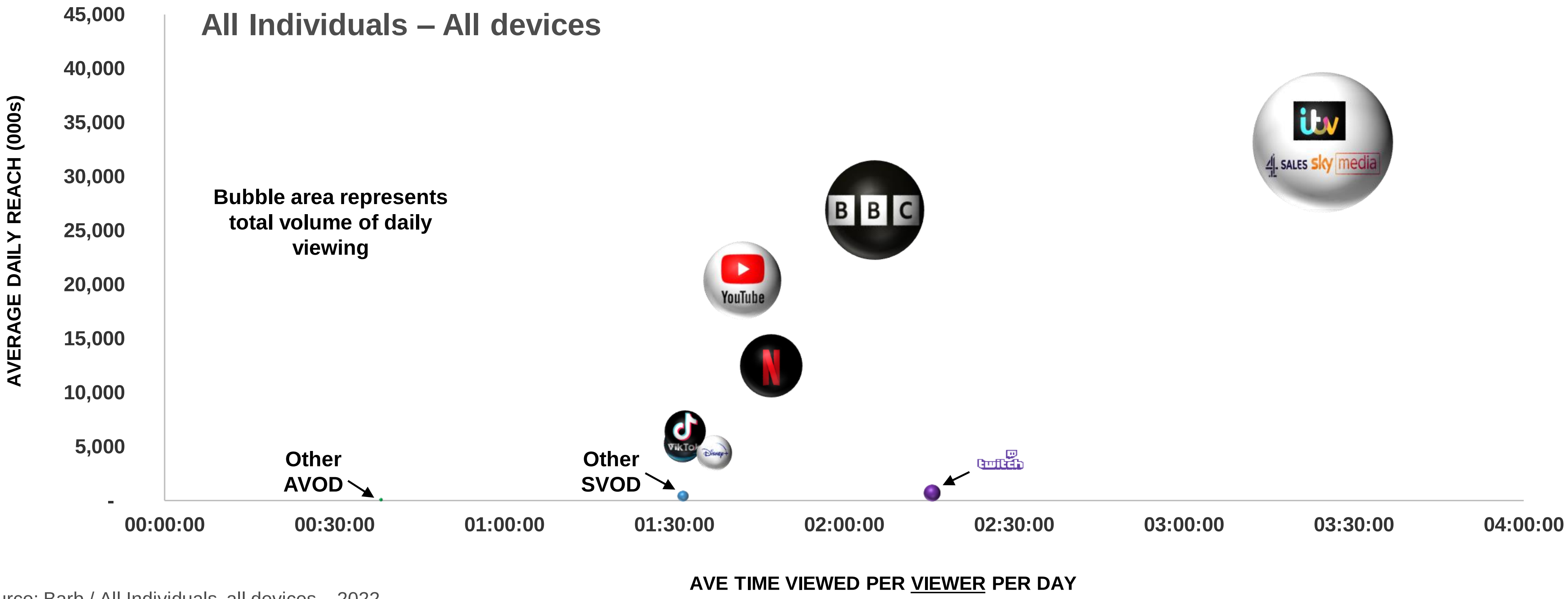
Commercial broadcasters collectively provide the highest reach and time spent



Source: Barb / All Individuals, all devices – 2022

An average broadcast TV campaign of 400 TVRs in the UK gets 244 million views

Source: Barb Dec 2022, Individuals

“Gogglebox”, Channel 4

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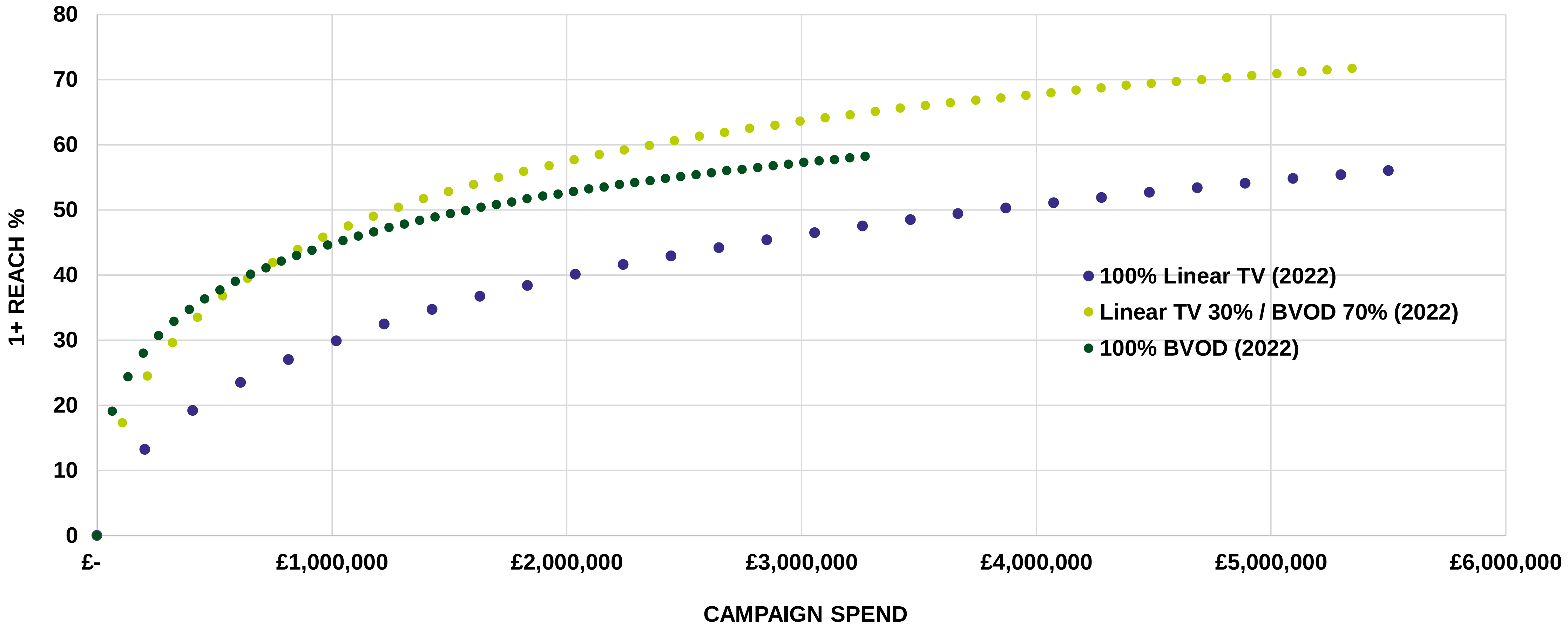
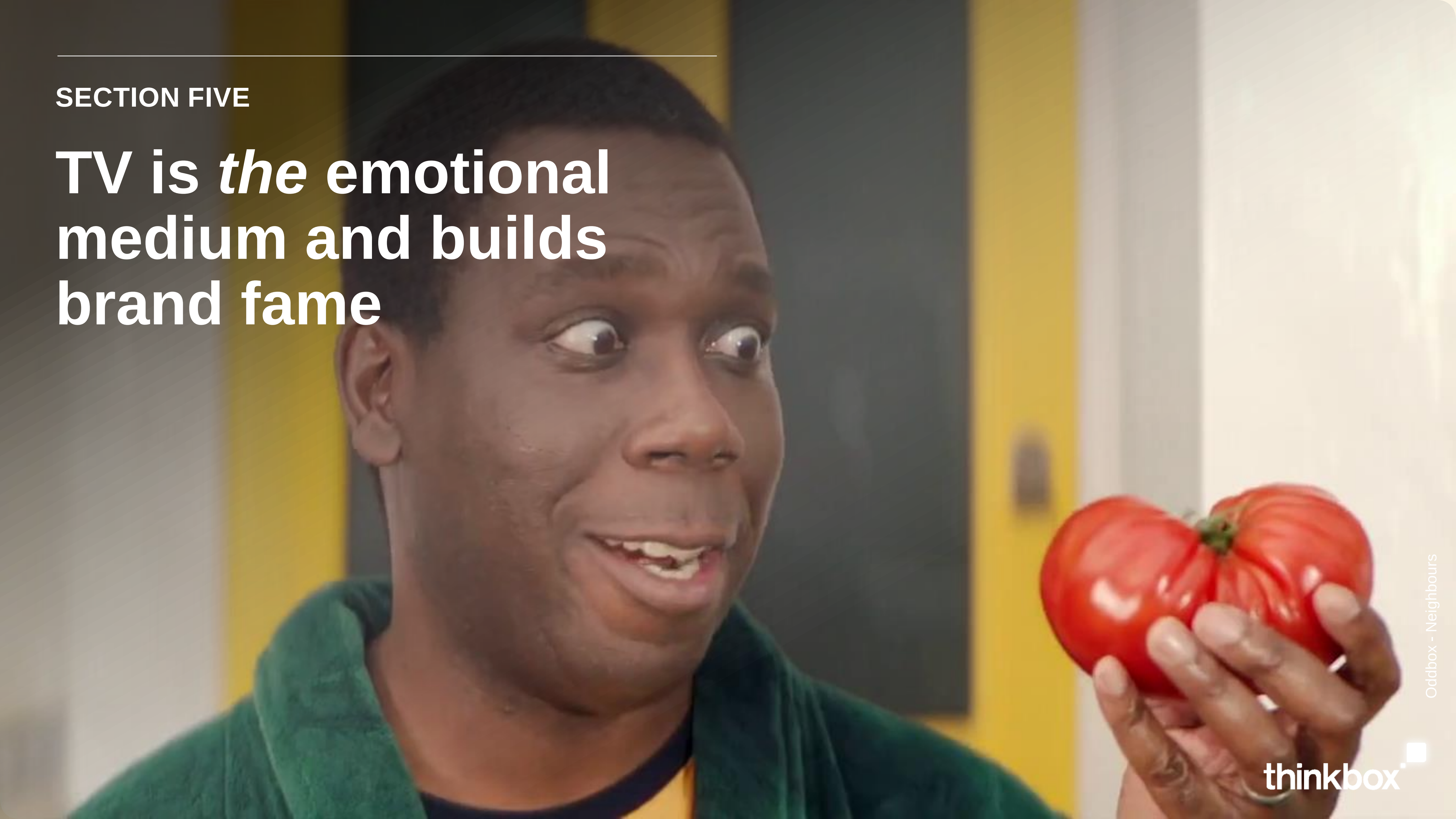
BVOD is critical for delivering cost effective reach for 16-34s



Source: Barb BVOD Planner (2022, 6 weeks 39-44) / natural delivery / station average prices

SECTION FIVE

TV is *the* emotional medium and builds brand fame



Oddbox - Neighbours

Summary - TV is *the* emotional medium and builds brand fame

- TV advertising is most likely to make you laugh **(52%)** and is the most liked **(40%)**
- TV is the medium most likely to signal **brand fame**
- Higher-performing creatively-awarded campaigns are most likely to have higher shares of spend on TV

Sources: please see notes

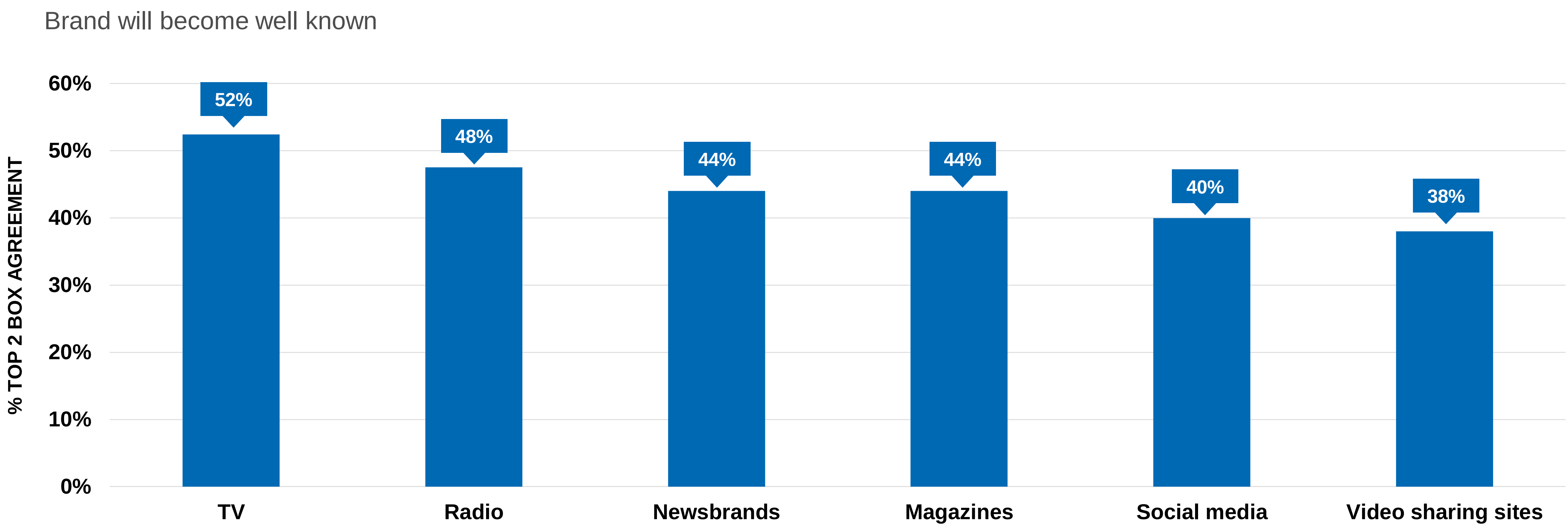
TV ads evoke emotion more than those in other media

In which, if any, of the following places are you most likely to find advertising that…'

	TV	Social Media	Radio	YouTube	Cinema	Magazines	Outdoor	Newspapers	Search	Direct Mail	Websites
Makes you laugh	52%	35%	13%	21%	16%	5%	6%	6%	4%	2%	3%
Makes you feel emotional	47%	17%	6%	10%	15%	5%	3%	9%	4%	2%	2%
You like	40%	27%	10%	12%	14%	15%	8%	12%	14%	4%	4%

Source: Adnormal Behaviour, 2022, Ipsos / Thinkbox. Q.TN3: In which, if any, of the following places are you most likely to find advertising that...
Base: 'normal' people (1,158)

TV advertising signals brand fame

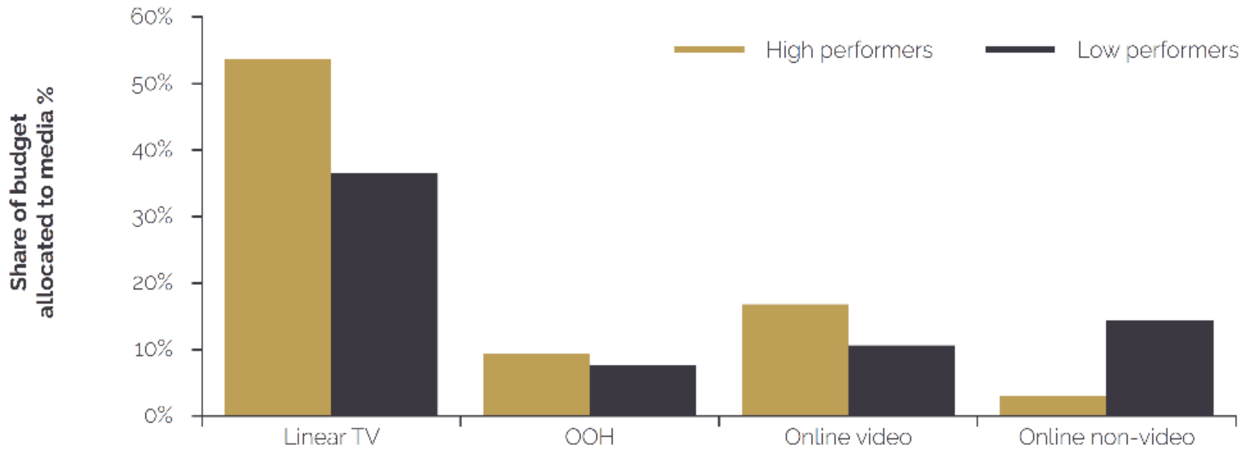


Source: Signalling Success, 2020, house51 / Thinkbox. Adults 16+. Top 2 box agreement “This brand will become well known”

“It is revealing to contrast creative high performers’ media tendencies with those generally favoured by creative awards judges.
TV is the biggest media tendency for high performers and yet, overall, judges tend to give creative awards much more often to those that use online video and social media. These media can be effective too, but their effectiveness doesn’t really justify all the attention they are getting.”

Figure 21

Performance is boosted by broad-reach conspicuous media

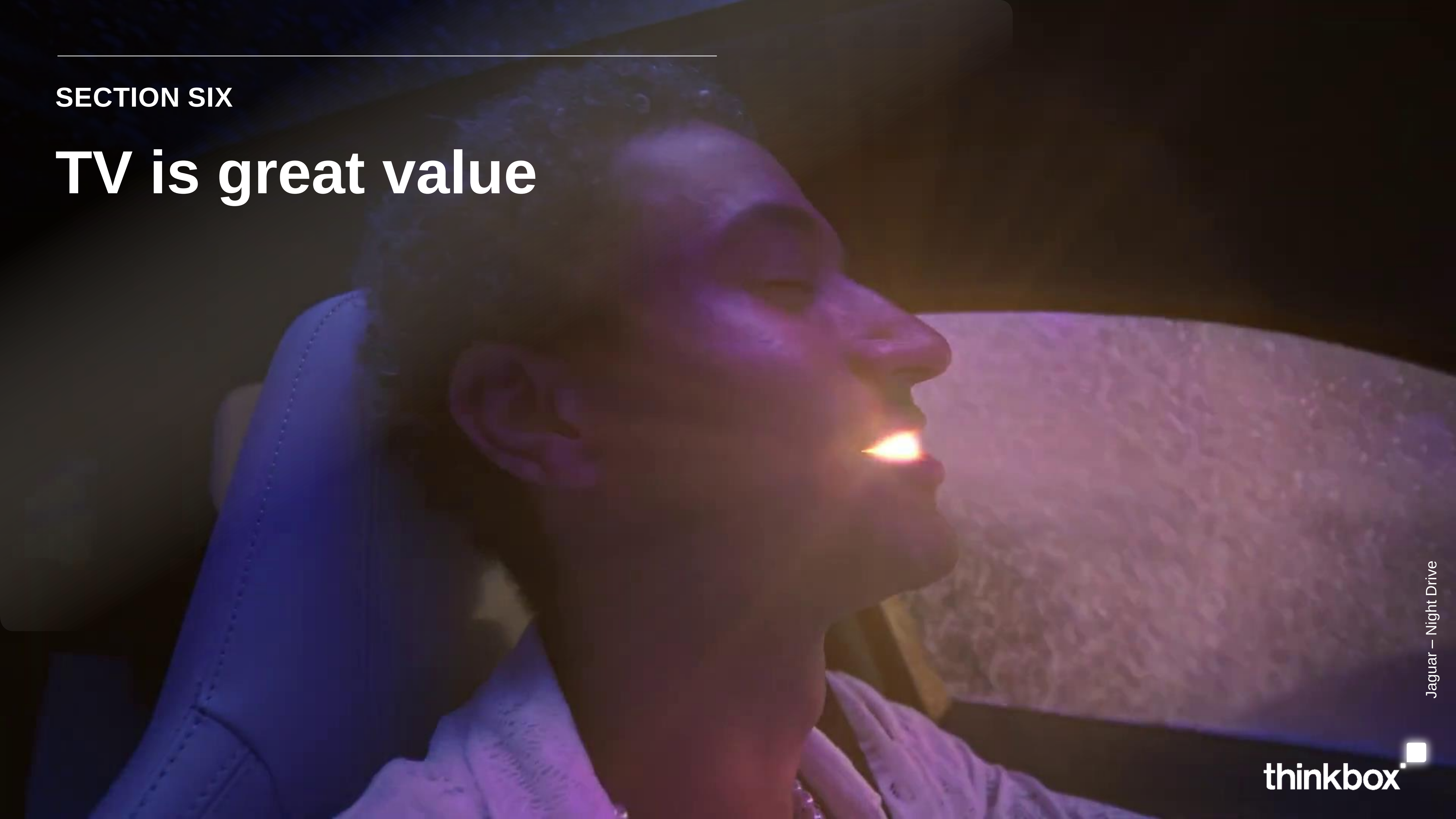


Source: IPA Databank, 2008-2018 creatively awarded cases

Source: ‘The Crisis in Creative Effectiveness’, Peter Field Consulting / IPA, June 2019

SECTION SIX

TV is great value



Jaguar – Night Drive

Summary - TV is great value

- The average cost of buying the media space to get one person in the UK to see a TV (linear and BVOD) advert is **0.8p** (in 2022)

- The average cost across TV advertising (linear and BVOD) for 30 seconds is just **£8**, for YouTube, its £12, whilst for non-broadcaster online video (excluding YouTube), it goes up to a £130.

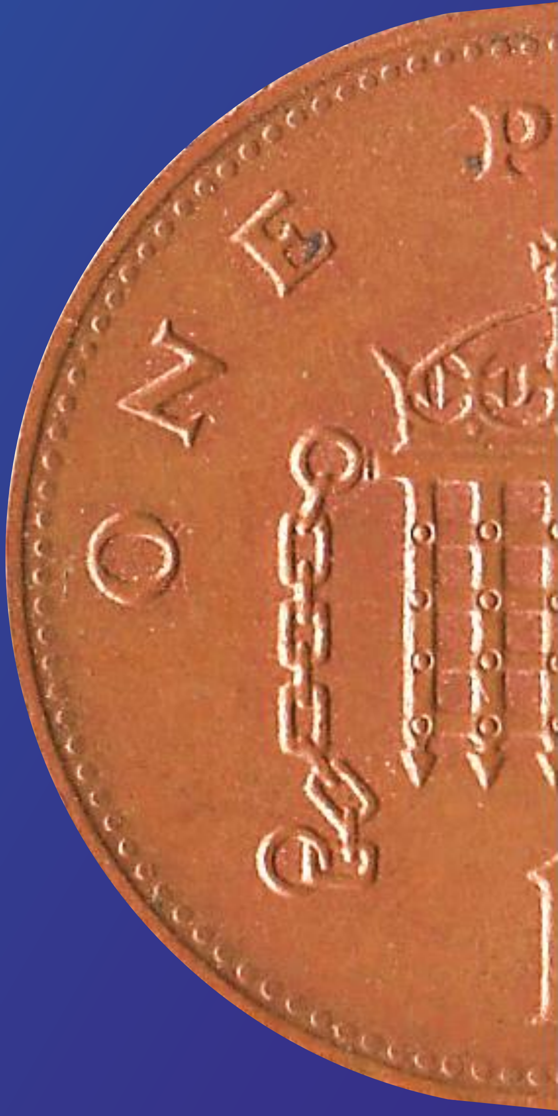
- When buying 1 million 16-34s on linear TV, you also get **3.5m** 4-15s / 35+ for free!

Sources: please see notes

Ant and Dec's Limitless Win, ITV

Average TV view costs **0.8p** (in 2022)

The average cost
of buying the media space
to get one
person in the UK
to see a TV (linear and
VOD) advert
costs over half a penny



Source: 2022, Thinkbox estimates using AA/WARC

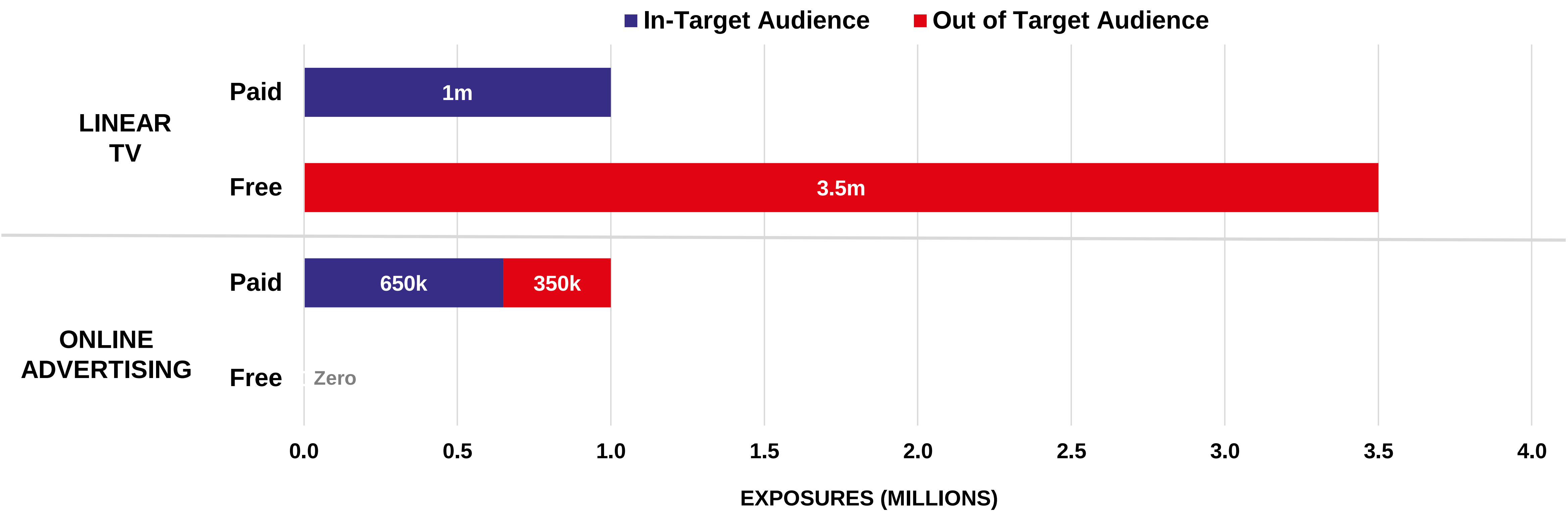
TV advertising is great value

	Revenue £ billion	Minutes of AV advertising per person, per day	Cost per Thousand (30 sec)
Broadcaster TV (Inc BVOD)	£5.1	14.2	£8
YouTube	£1.1	2.1	£12
All other online video	£3.9	0.7	£130

Source: 2022, Thinkbox estimates using AA/WARC, Barb, ViewersLogic, IPA TouchPoints 2022

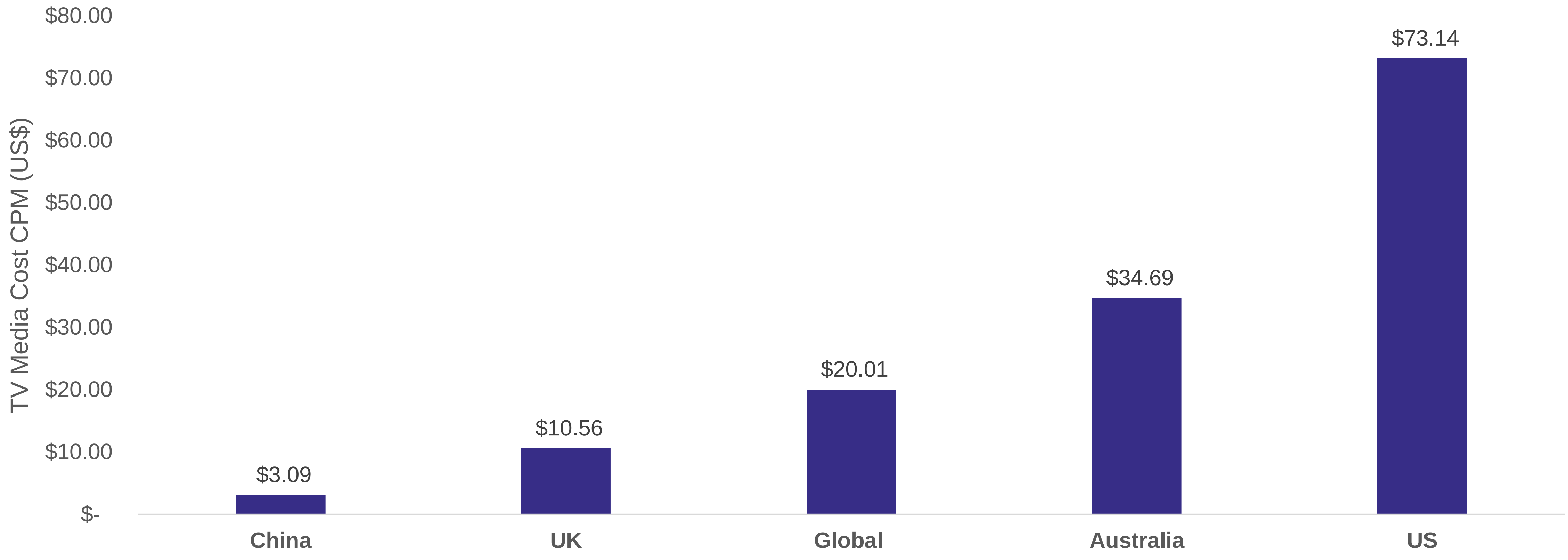
The great 'wastage' illusion

When you buy one million 16-34 exposures you get…



Source: Barb: linear TV data based on top 50 profiling campaigns (over 10m impacts) for 16-34s, June 2019.
Online video based on Nielsen digital ad ratings UK benchmarks (18-34) Q3 2018

UK linear TV is great value



Source: WARC estimates 2022, calculated by applying the WFA's media inflation figures – drawn from a panel of agencies and consultancies – to historic data

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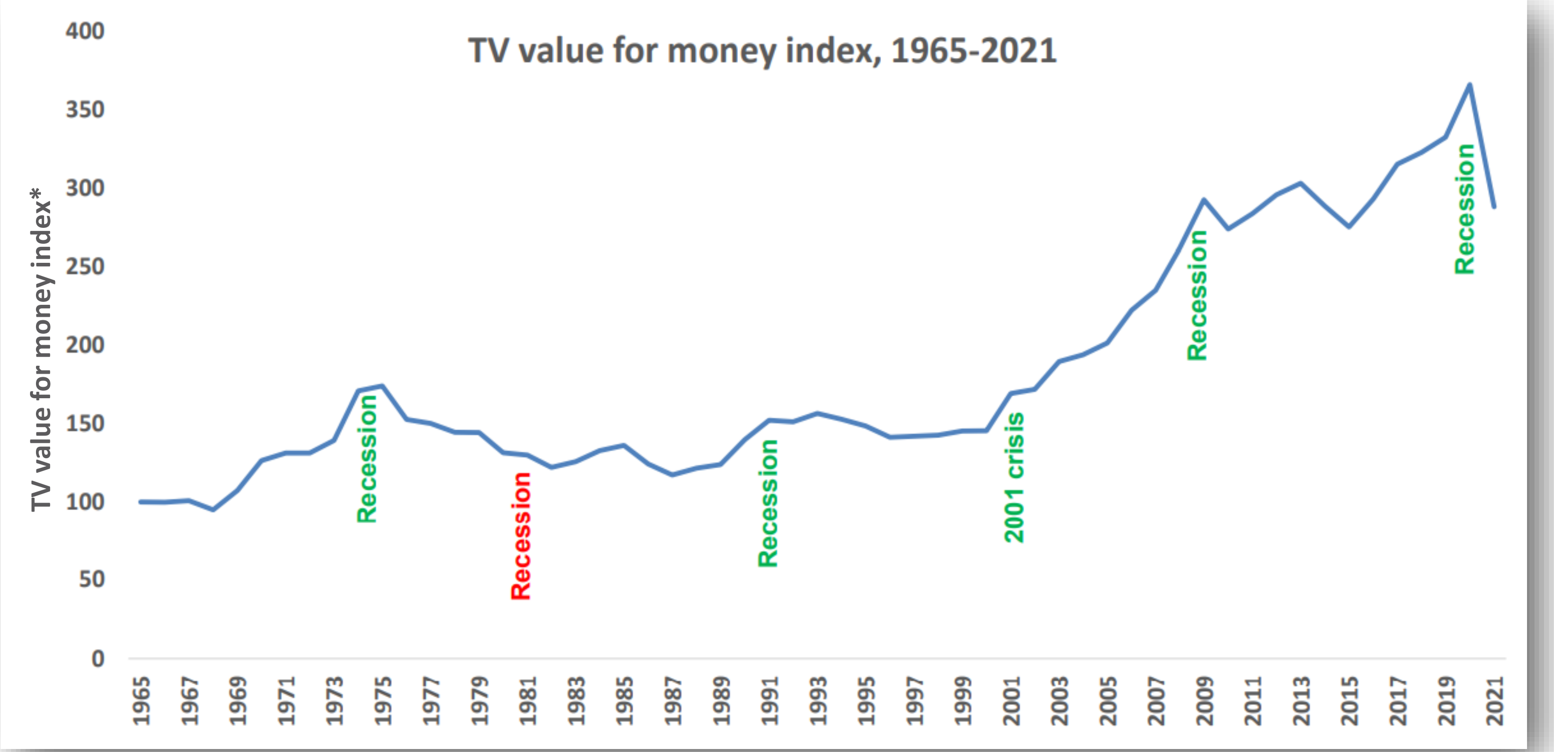
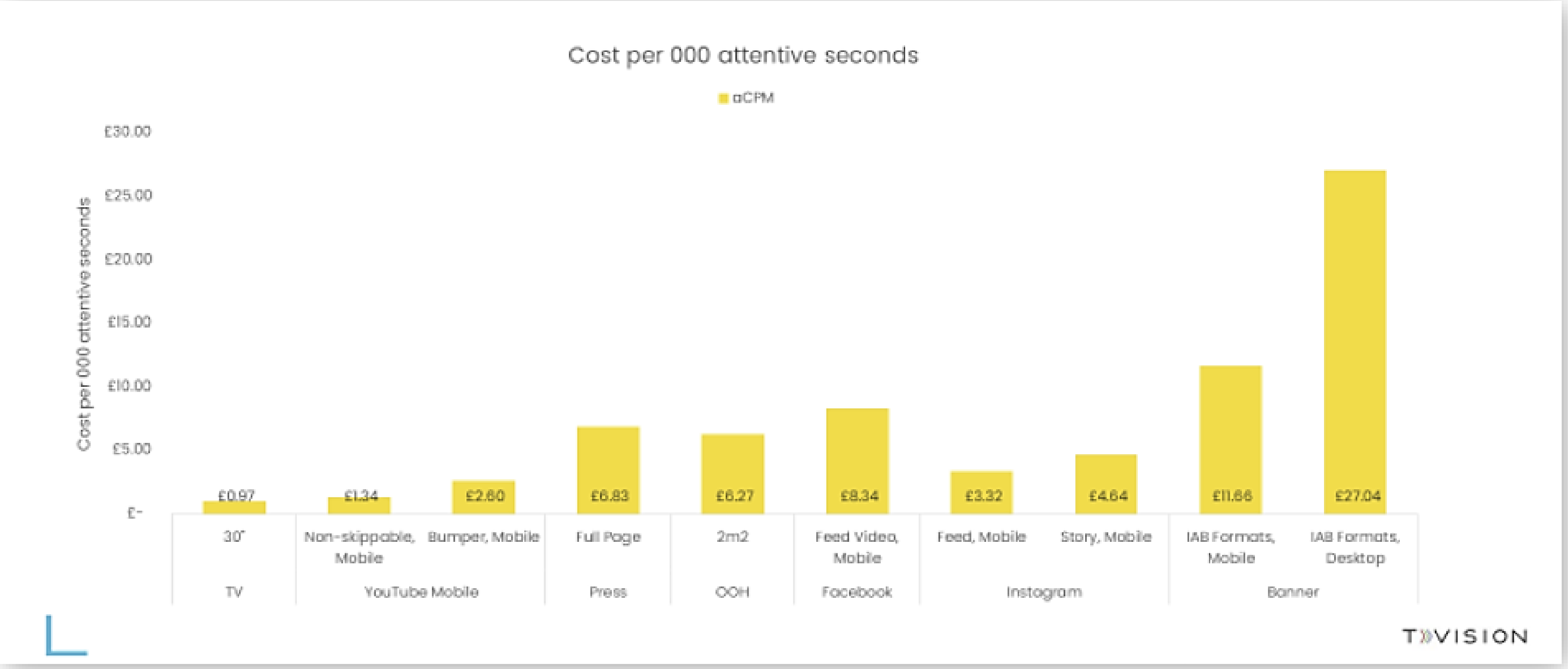
The value of TV increases during downturns

A high TV value for money index means that the price of TV is low, relative to total consumer spend levels



Source: Les Binet, 'Marketing in the post-covid economy: A planning framework for turbulent times'. ONS, Advertising Association, WARC. *TV value for money index = consumer spending / TV CPT indexed from 1965

TV is an ‘attention bargain’



Source: TV: Tvision / Lumen UK TV Panel. YT, Instream, Teads, Facebook Feed, Banners: Lumen digital panels. Press: Lumen Omnibus. OOH: AM4DOOH project. IG, FB Watch, TikTok: Lumen studies (weighted to be consistent with passive panel). CPM sources: Ebiquity / Fou Analytics (taken from *The Challenge of Attention,* 2020)

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Find out more at Thinkbox.tv

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