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TV advertising's ultimate nickable charts

What every marketer
should know



thinkbox

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

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Walkers "Roof"

SECTION ONE

TV viewing: the facts



Summary – TV Viewing: the facts

- Broadcaster TV accounts for 58% of our video day
- In total, 2.2 billion TV ads are seen in the UK every day
- 65% of adults watch over 50 linear ads a week
- The average adult spends 29% of the 'chosen' media day watching TV

Sources: please see notes



The Handmaid's Tale, Channel 4

TV viewers have never had it better

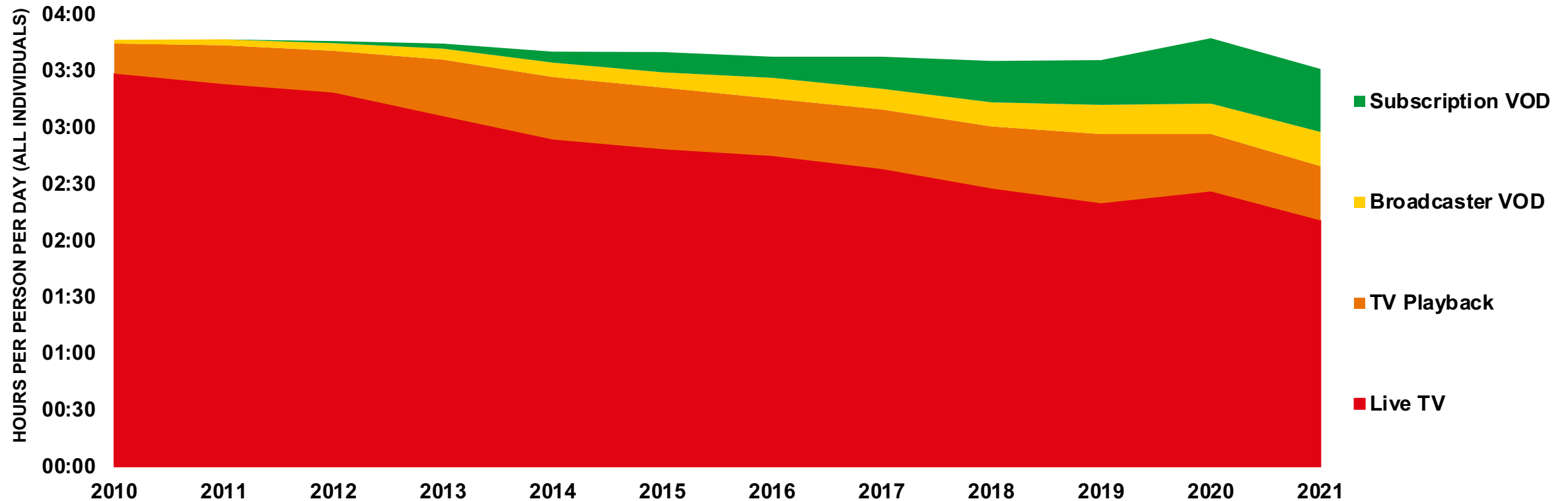
- **\$100bn** is spent on high quality, professionally produced video content by the US networks, SVOD players and UK broadcasters combined
- **69.7%** of main TV screens 40" or bigger
- **83.6%** have access to broadcaster VOD on TV set

Source: MoffettNathanson, BARB, Touchpoints, Thinkbox estimates



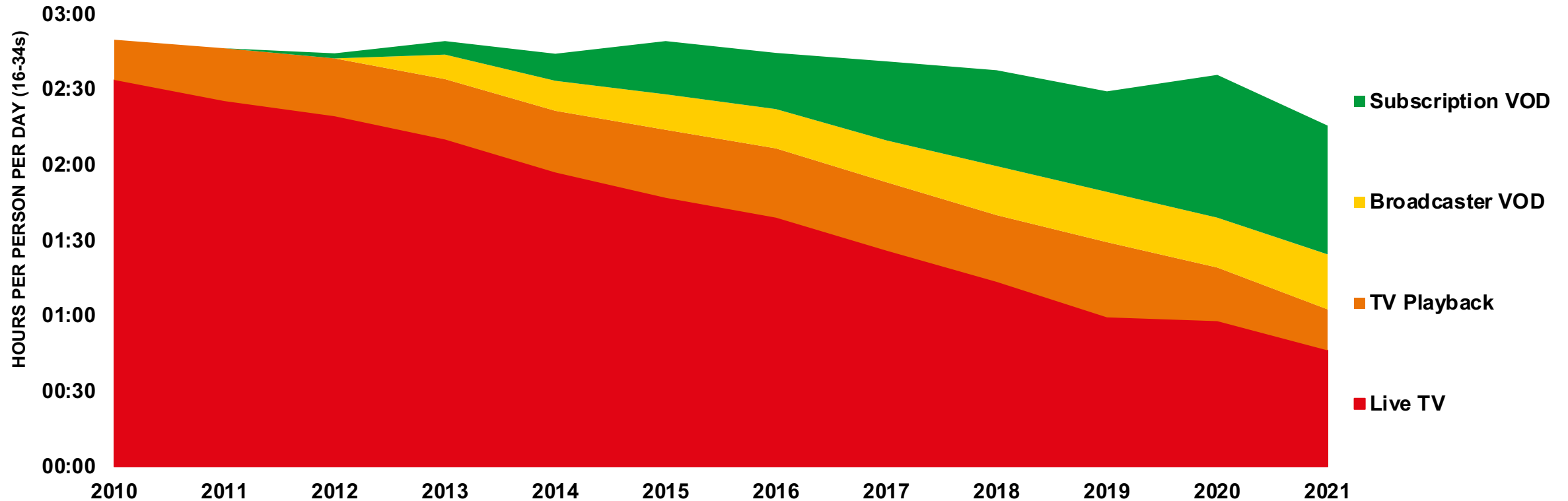
Dunelm "Home Truths"

Viewing by individuals has returned to pre-pandemic levels



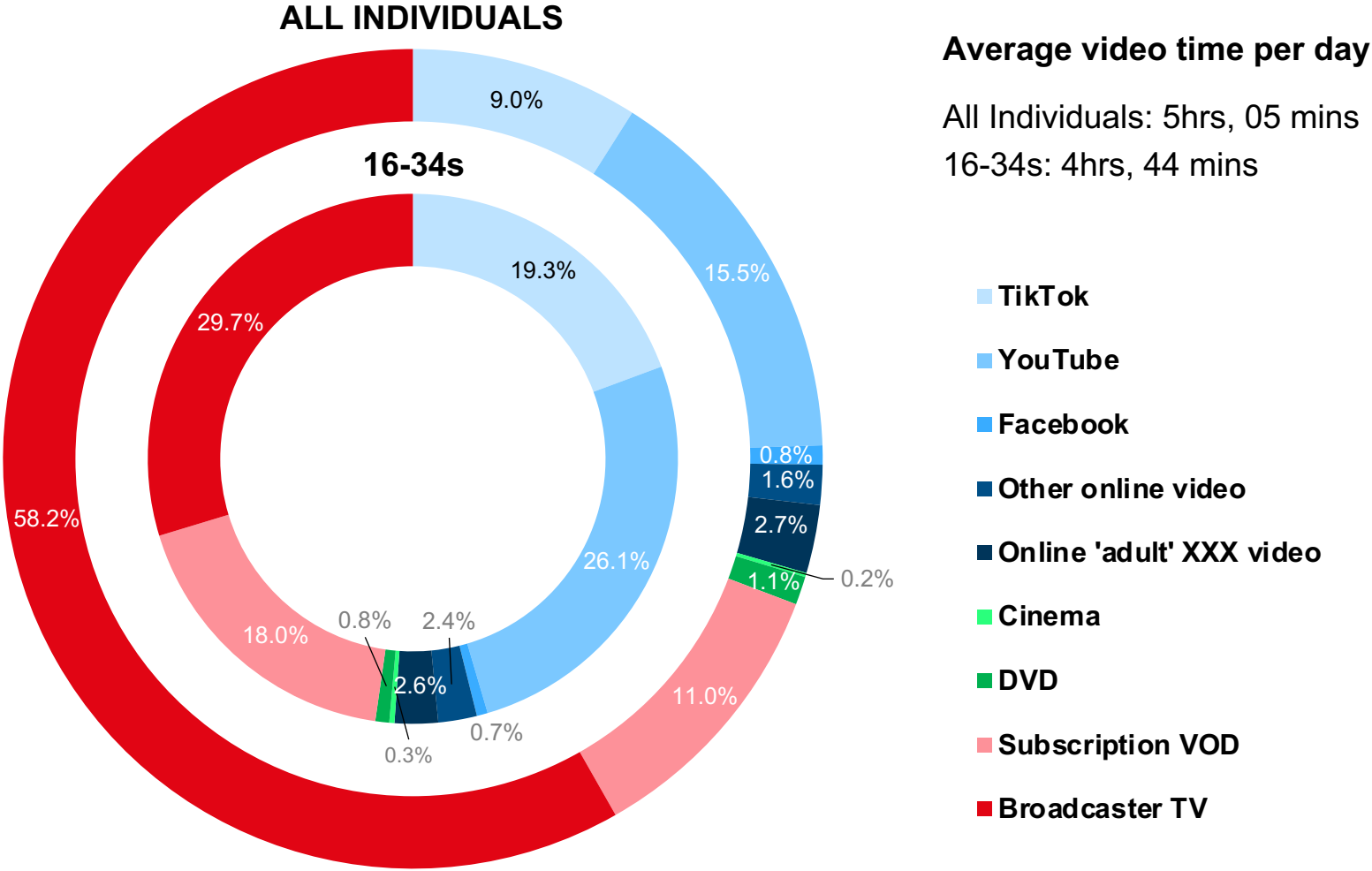
Source: 2010-2021, BARB / Broadcaster stream data / IPA TouchPoints/ ONS, Individuals

16-34s viewing is increasingly fragmented across platforms



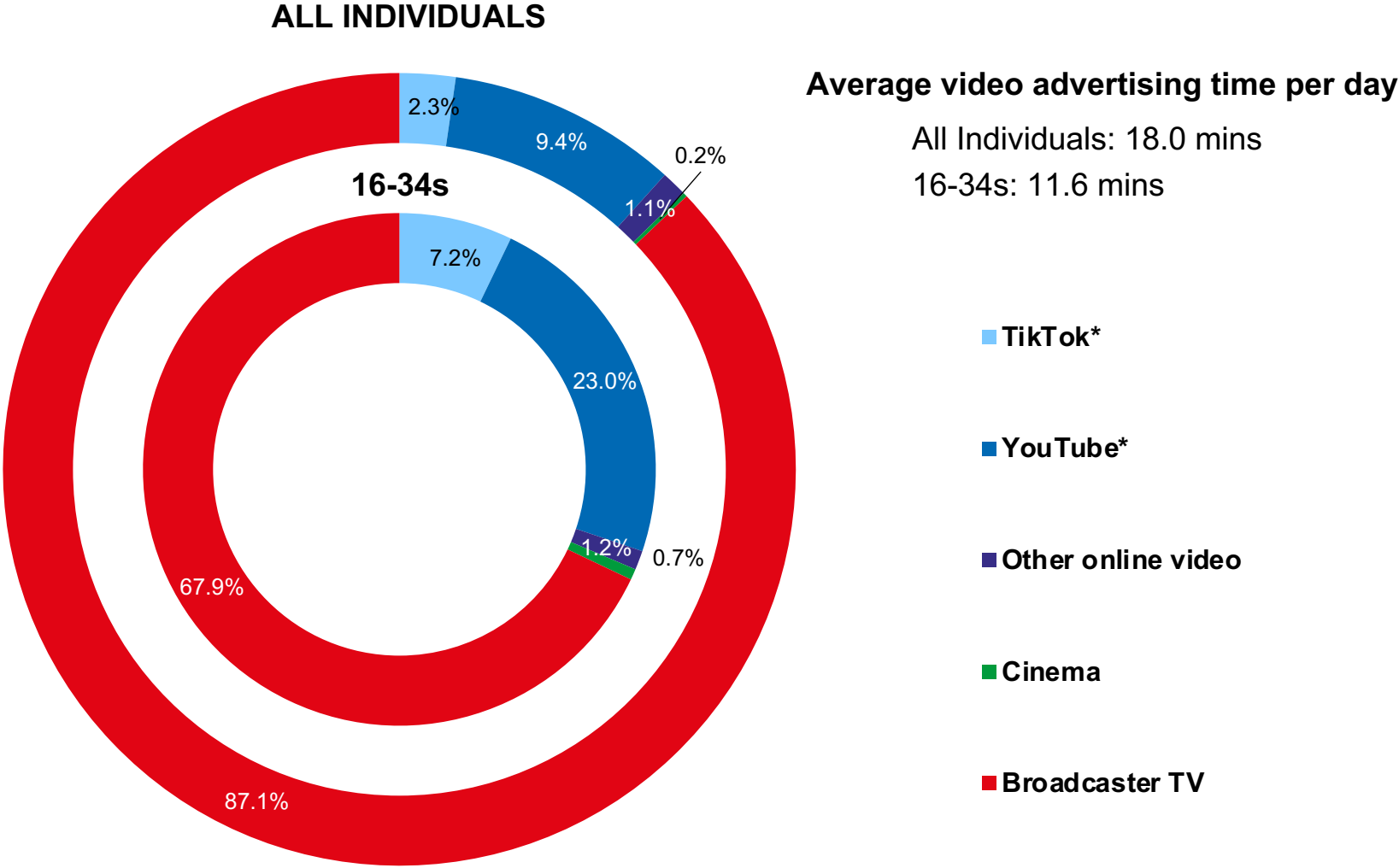
Source: 2010-2021, BARB / Broadcaster stream data / IPA TouchPoints/ ONS, 16-34

Broadcaster TV accounts for 58% of video day



Source: 2021, BARB / Broadcaster stream data / Comscore / IPA TouchPoints 2021 (wave 1 and 2) / Pornhub / UK Cinema Advertising Association (CAA), Office of National Statistics (ONS)

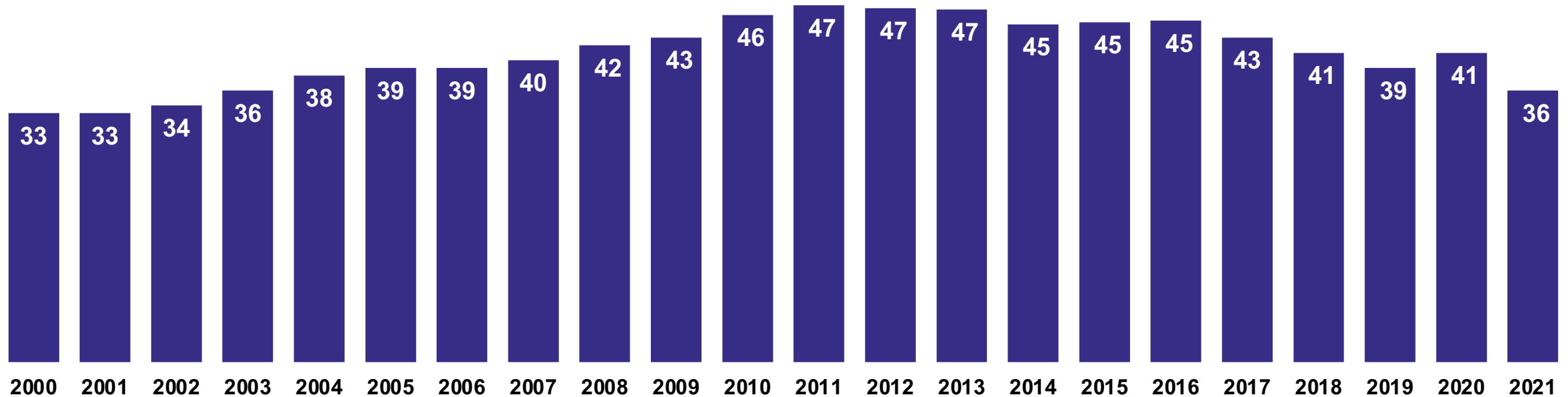
Broadcaster TV accounts for 87% of our video advertising day



Source: 2021, BARB / Comscore / Broadcaster stream data / IPA TouchPoints 2021 / Rentrak / CAA (2021) * YouTube ad time modelled at 3% of content time, TikTok ad time modelled at 1.5% of content time

On average, each individual sees 36 linear TV ads a day

Only includes ads viewed at normal speed on a TV set
In total **2.2 billion** TV ads are seen in the UK every day



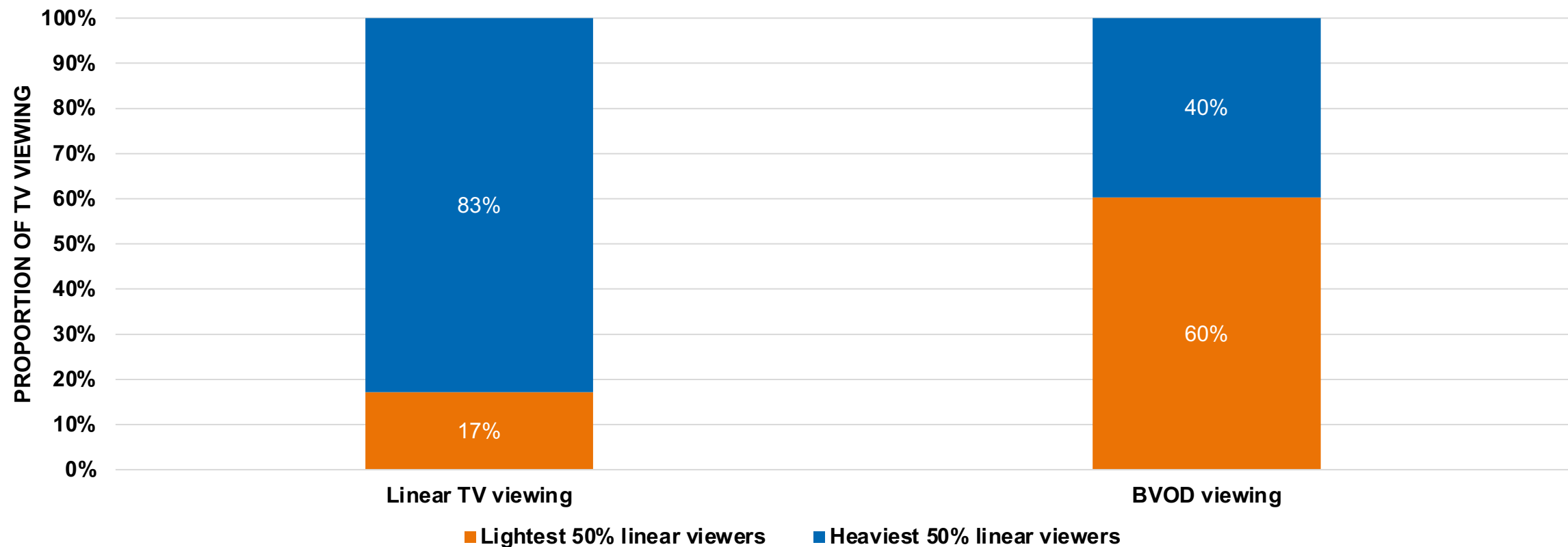
Source: BARB, UK Full Network, 2000 - 2021, individuals

65% of Adults watch over 50 linear ads a week



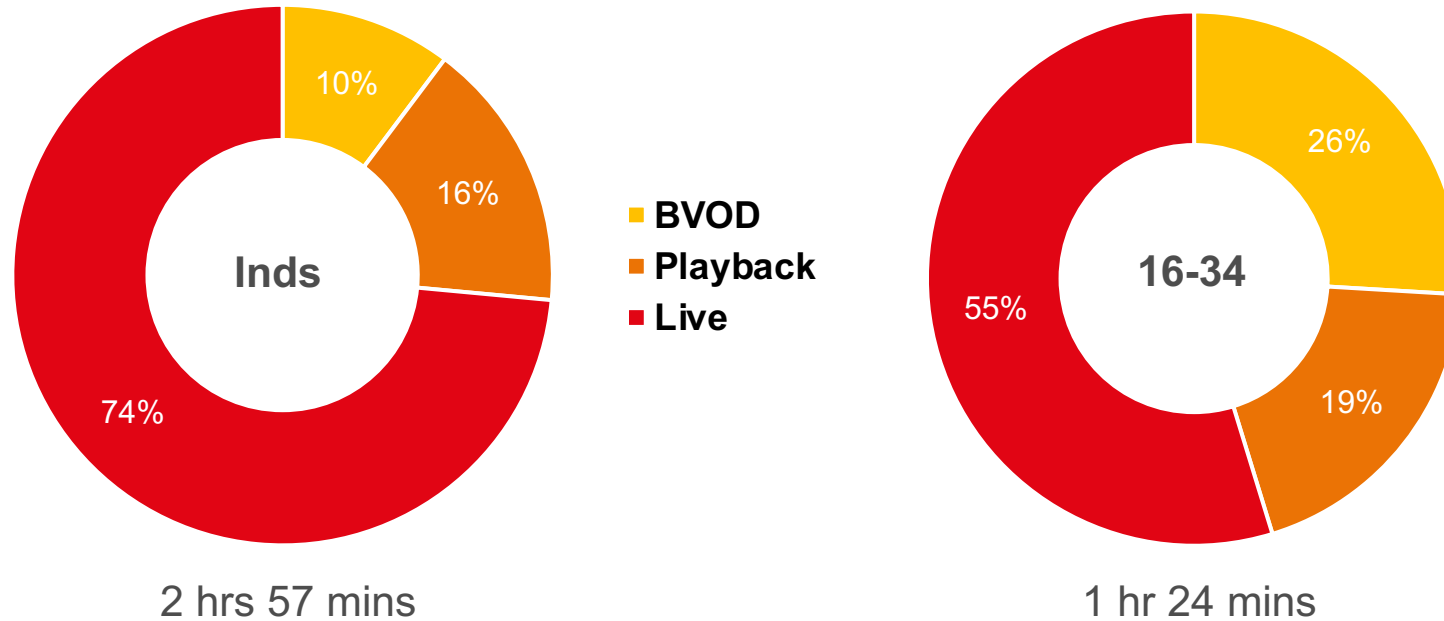
Source: BARB, Adults. Ads viewed at normal speed. Weeks 19 & 20 for each year (early May).

Lightest half of linear TV viewers watch majority of BVOD



Source: IPA TouchPoints 2021, Wave 2 (Fieldwork Dates: 22nd Jun – 4th Sep). adults 15+.

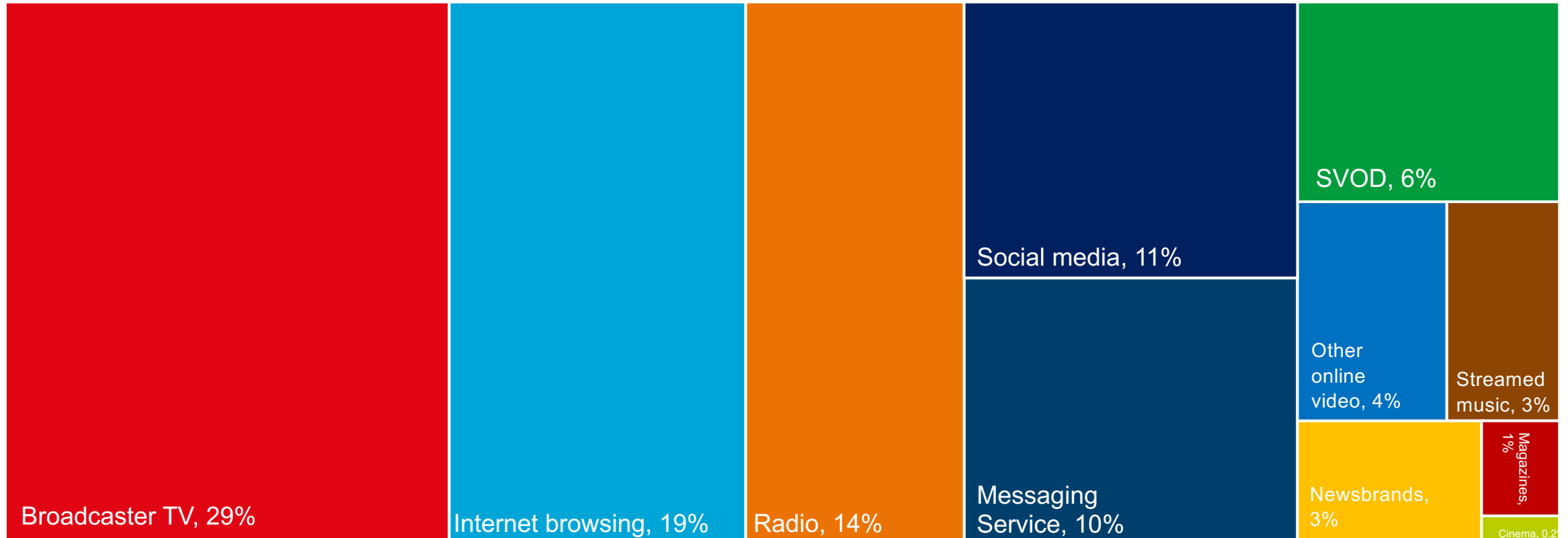
How we watch broadcaster TV



Source: 2021, BARB / Broadcaster stream data

TV accounts for 29% of adults' chosen media day

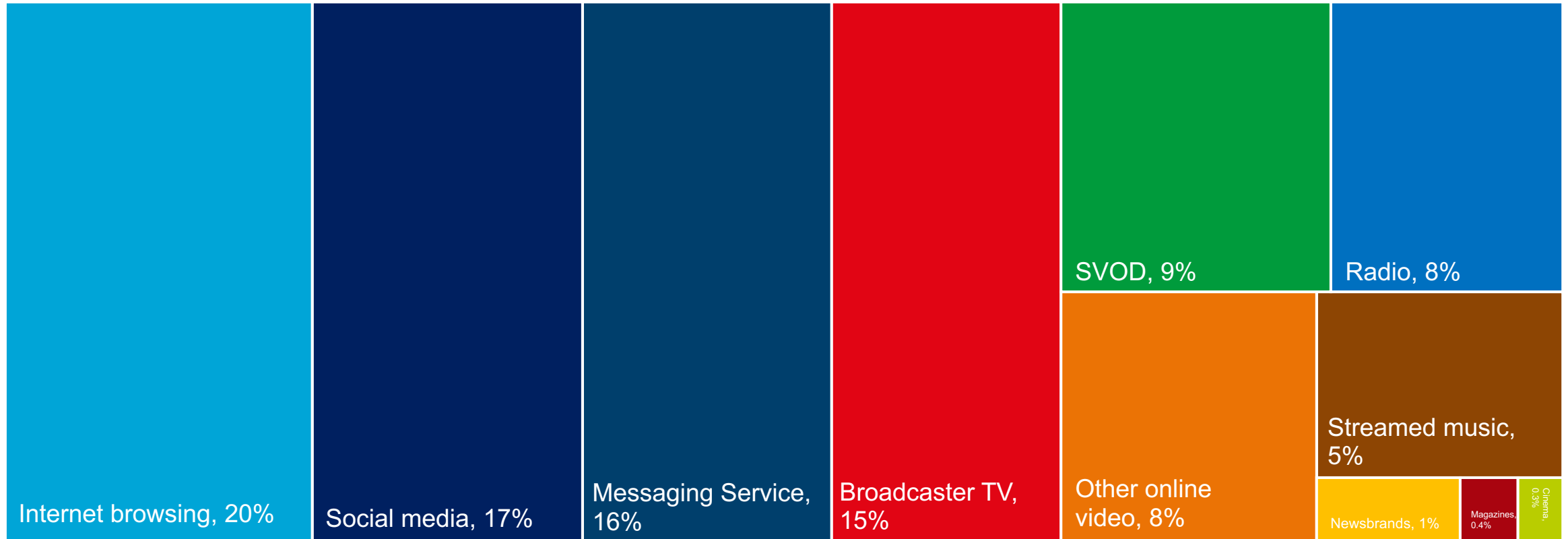
ADULTS



Source: IPA TouchPoints 2021, Wave 2 (Fieldwork Dates: 22nd Jun – 4th Sep). . Base: adults 15+. Includes only media which people choose to consume. TV, radio, newsbrands & magazine figures include online/app consumption

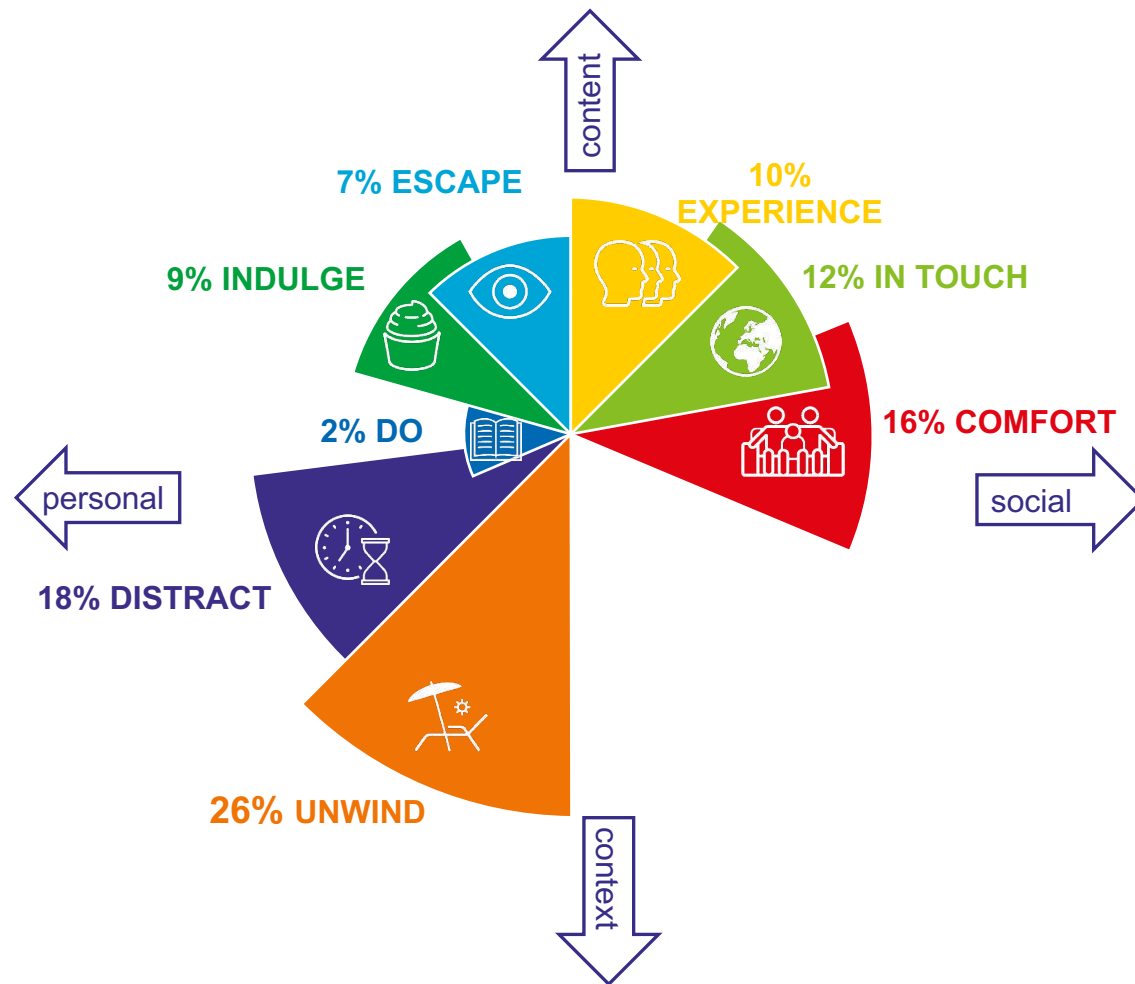
Younger people have a diverse media day

16-34



Source: IPA TouchPoints 2021, Wave 2 (Fieldwork Dates: 22nd Jun – 4th Sep). Base: 16-34s. Includes only media which people choose to consume. TV, radio, newsbrands & magazine figures include online/app consumption

There are 8 need states which drive video viewing



Top 20 most-viewed TV programmes in the UK 2021

- Like-for-like comparison of the top **Netflix** & **Broadcaster** programmes in terms of volume of viewing per household across 2020
- **Friends** & **The Big Bang Theory** were the only Netflix series to make the top 10
- Highest performing 'Netflix Original' series was **Squid Game**, ranked at 62

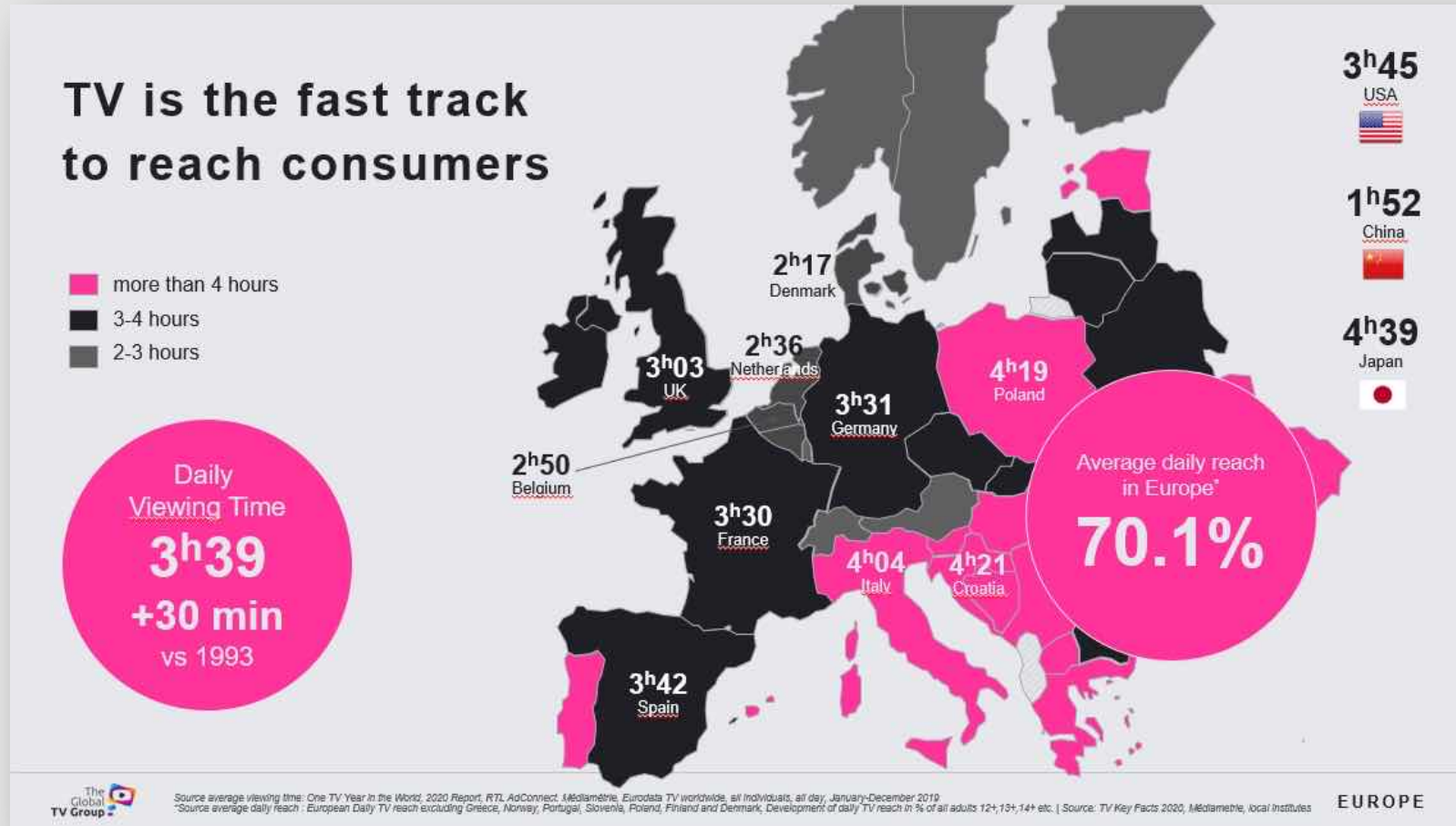
Rank	Viewing Source	Programme	HH views (m)
1	ITV	Coronation Street	11,909
2	ITV	Emmerdale	11,585
3	ITV	The Chase	8,508
4	Netflix	Friends	6,898
5	ITV	This Morning	6,820
6	BBC	EastEnders	6,439
7	Netflix	The Big Bang Theory	6,383
8	BBC	The One Show	6,294
9	BBC	Bargain Hunt	6,281
10	BBC	Pointless	6,182
11	ITV	Tipping Point	5,861
12	Netflix	The Office	5,600
13	ITV	Good Morning Britain	5,239
14	ITV	Lorraine	4,908
15	Netflix	Superstore	4,754
16	CH4	The Big Bang Theory	4,551
17	Netflix	Modern Family	4,544
18	Netflix	Brooklyn Nine-Nine	4,337
19	BBC	Olympics	4,300
20	Netflix	Peppa Pig	4,175



43	Netflix	Teen Titans Go!	1,908
44	Netflix	The Vampire Diaries	1,814
49	Netflix	How I Met Your Mother	1,762
53	Netflix	PAW Patrol	1,630
61	Netflix	New Girl	1,412
62	Netflix	Squid Game	1,405
66	Netflix	Horrid Henry	1,367
76	Netflix	Schitt's Creek	1,281

Source: TV – BARB, one minute household reach. Netflix – Digital-i, total stream 'starts'

Average daily TV viewing time around the world



Source: 'Global TV Deck', The Global TV Group, 2020

A close-up photograph of a woman with dark hair styled in an updo with a headband, drinking from a white teacup with a gold rim. She is wearing a dark blue floral dress and several gold necklaces with colorful beads. The background is softly blurred, showing green foliage.

SECTION TWO

**TV is a trusted &
safe environment
for brands**

Summary – TV is a trusted & safe environment for brands

- \$100bn is spent on high quality, professionally produced video content by the US networks, SVOD players and UK broadcasters combined
- TV ads were most trusted by all adults (37%) and 16-34s (38%)
- 49% of the EU population responded that they trusted TV against different media platforms

Sources: please see notes



TV is a class apart in the video world



High completion rates



Robust measurement



Full Screen



Brand safe content & pre-cleared ads



Sound on



Shared viewing



Viewed by humans

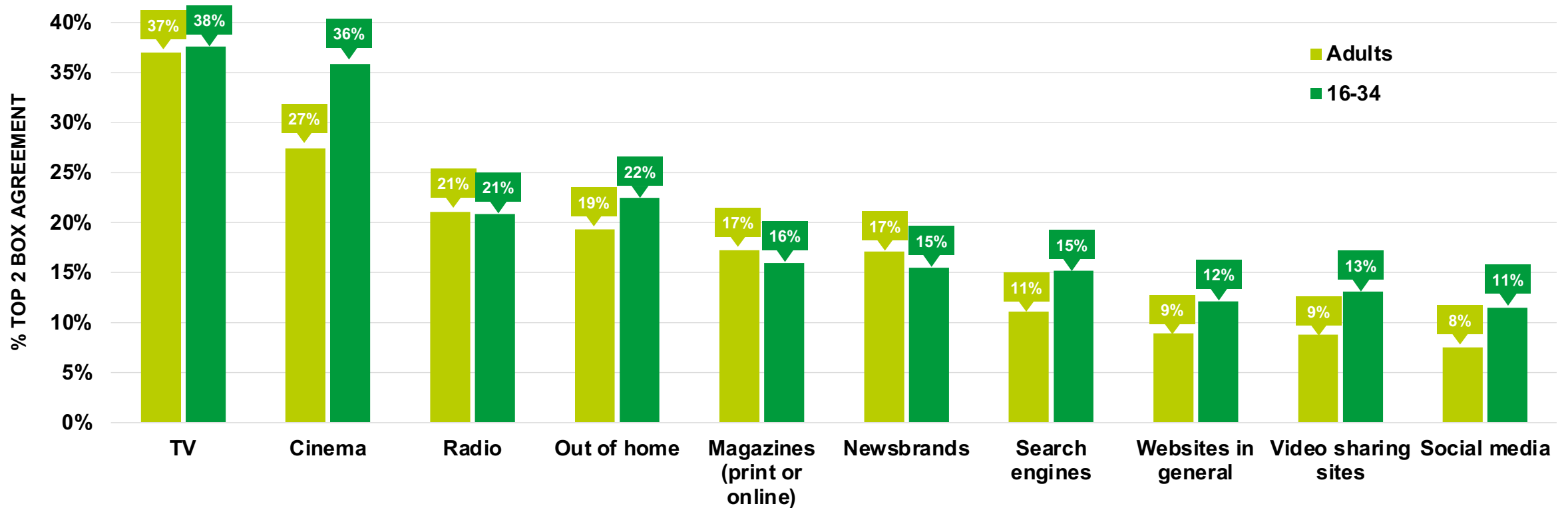


\$100bn spent on high quality content by US networks, SVOD players and UK broadcasters combined

Sources: MoffettNathanson

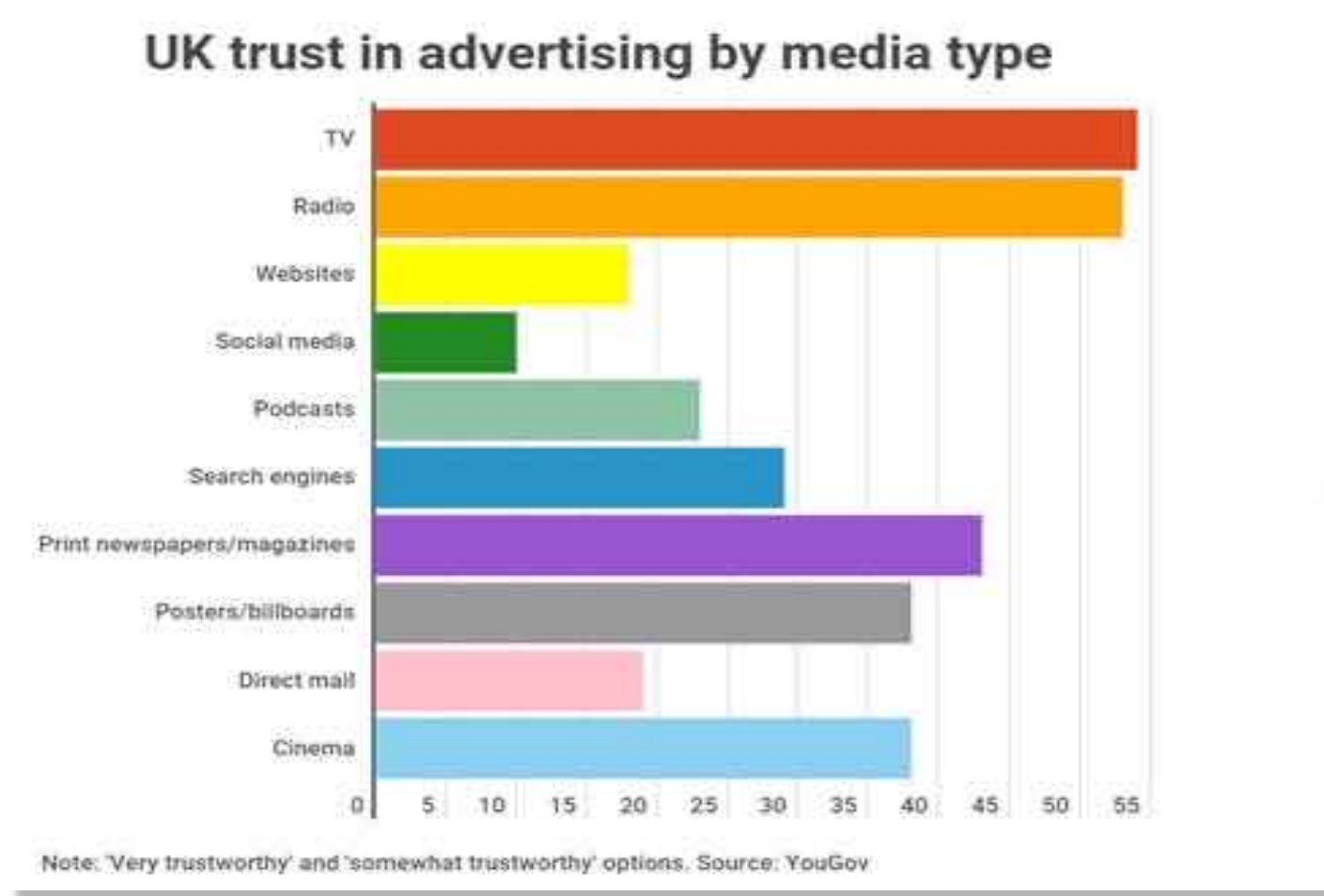
TV advertising is most trusted

How much would you trust brands that you see or hear advertising in each of these media?



Source: Signalling Success, 2020, house51 / Thinkbox. Top 2 box agreement "How much would you trust brands that you see or hear advertising in each of these media?"

TV & radio most trusted advertising channels in the UK

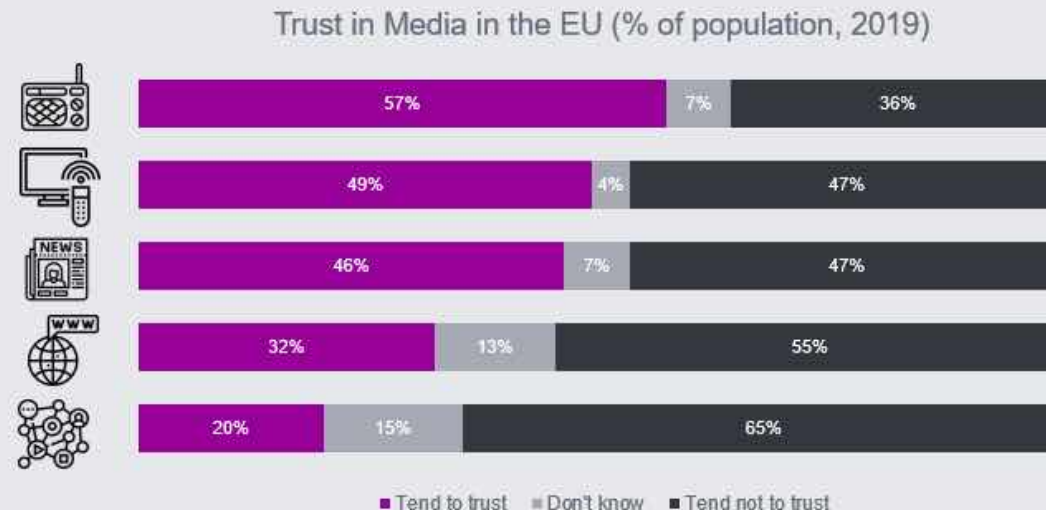


Source: YouGov, Campaign "Only 1 in 10 Brits trust social media advertising", 2021

TV is highly trusted across Europe

Across Europe, TV & radio are the most trusted

At EU level, traditional media enjoy the highest trust level



- Nearly half of EU citizens trust TV. Almost equal shares of citizens tend to trust and not to trust the written press.
- The Internet and social networks are the least trusted media at EU level.

Note: Survey results at EU level represent a weighted average across the 28 EU Member States, applying official population figures provided by EUROSTAT.

Source: 'Global TV Deck', The Global TV Group, 2020

SECTION THREE

TV: the most effective advertising



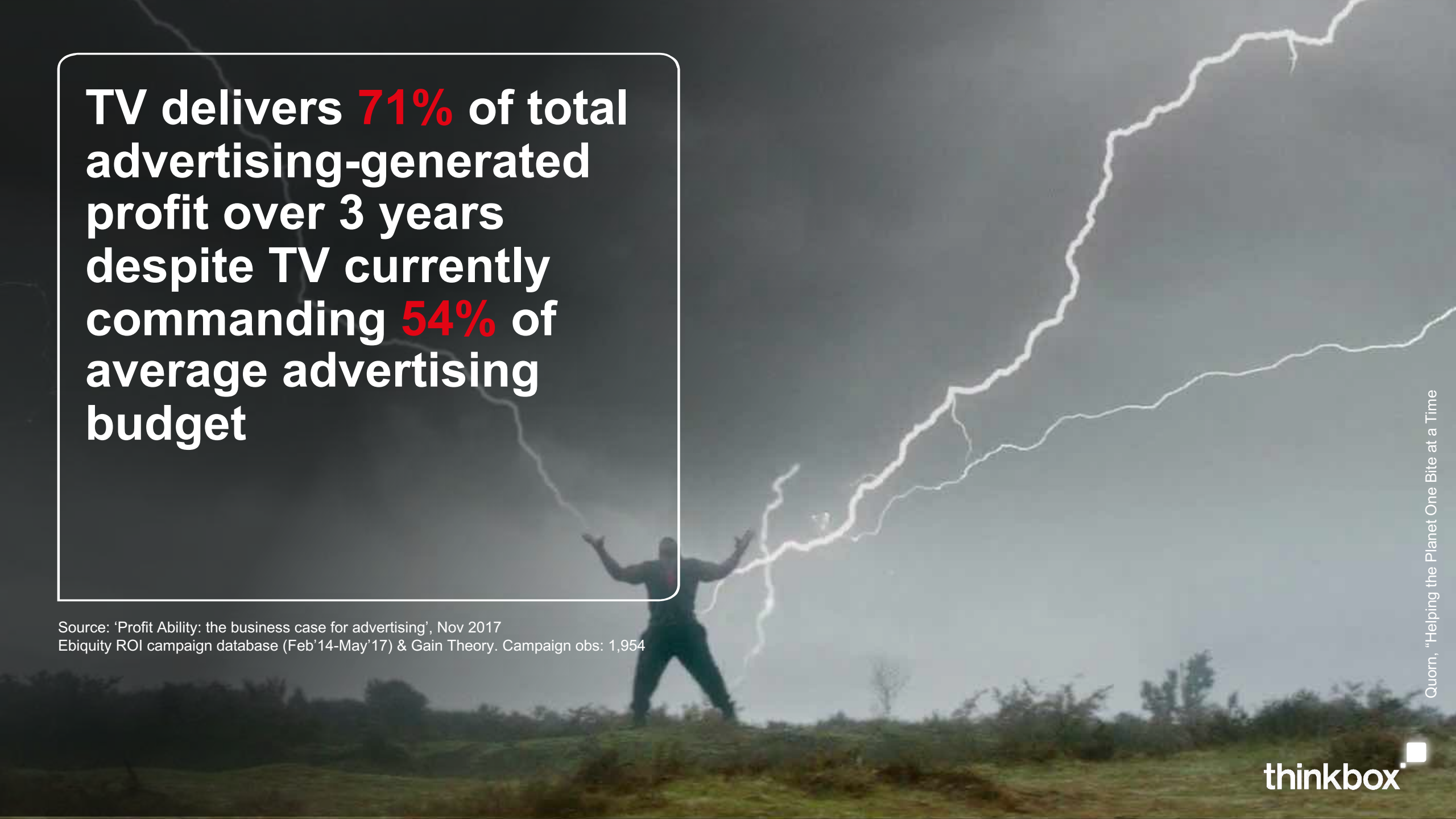
Summary – TV: the most effective advertising

- 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



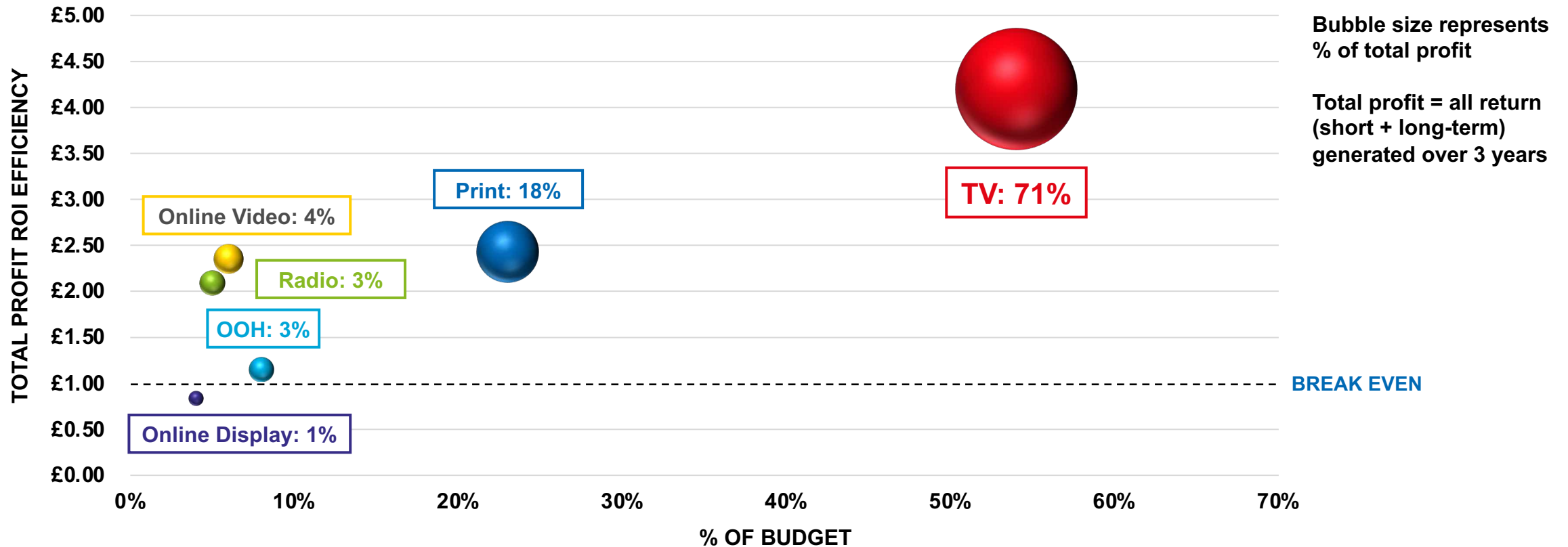
Churchill "Slide"



**TV delivers 71% of total
advertising-generated
profit over 3 years
despite TV currently
commanding 54% of
average advertising
budget**

Source: 'Profit Ability: the business case for advertising', Nov 2017
Ebiquity ROI campaign database (Feb'14-May'17) & Gain Theory. Campaign obs: 1,954

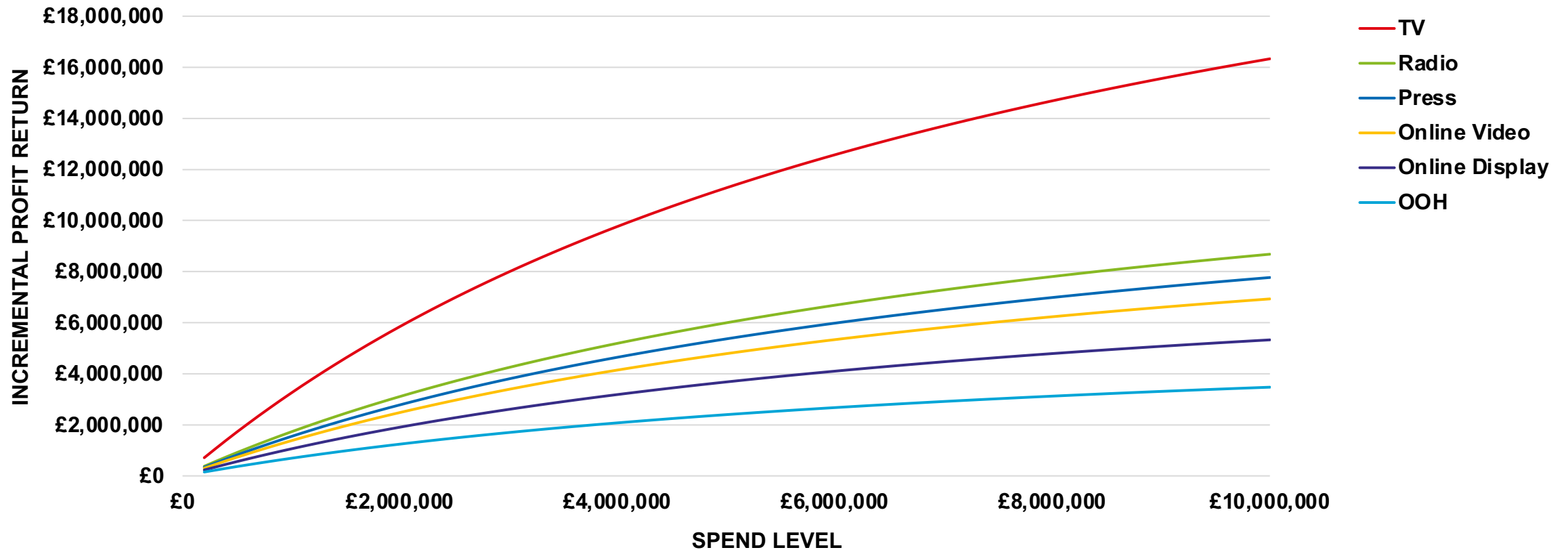
TV delivers 71% of advertising-generated profit



Source: 'Profit Ability: the business case for advertising', Nov 2017
Ebiquity ROI campaign database (Feb'14-May'17) & Gain Theory. Campaign obs: 1,954

NB: Online Video includes Broadcaster VOD, YouTube, Facebook video & online programmatic video

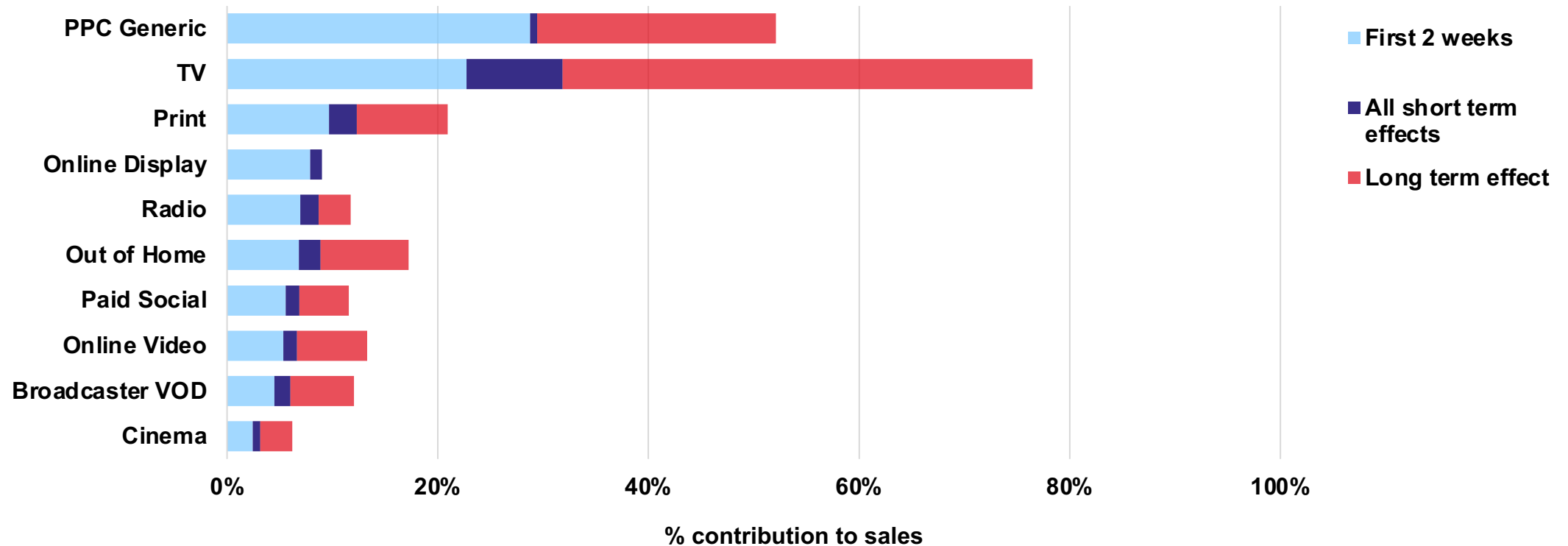
TV keeps delivering at higher levels of spend



Source: 'Profit Ability: the business case for advertising', Nov 2017
Ebiquity ROI campaign database. Financial Services example

NB: Online Video includes Broadcaster VOD, YouTube, Facebook
video & online programmatic video

TV's full short-term and sustained effects mean it generates the best sales volume overall



Source: 'Demand Generation', Nov 2019, MediaCom/Wavemaker/Gain Theory

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

Channel Generating the Effect	Channel Benefiting from 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

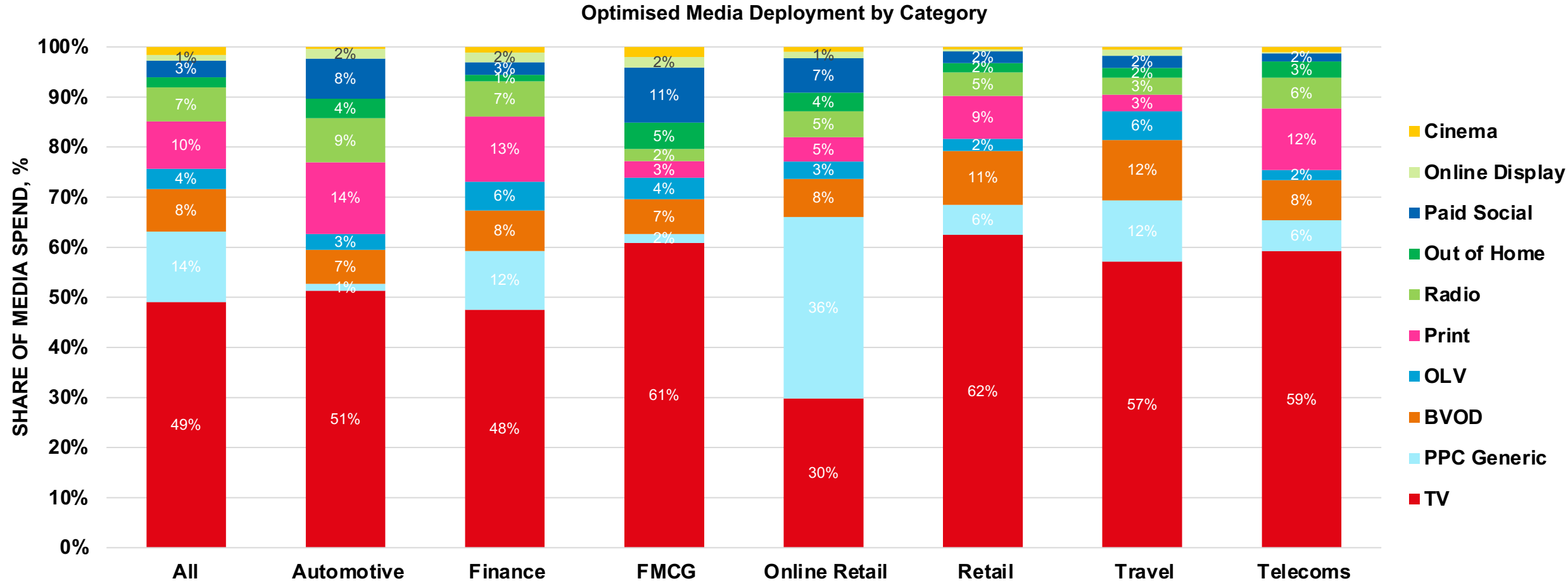
Media channel breakdown of short-term and total profit

FORM OF ADVERTISING	% OF TOTAL AD-GENERATED PROFIT (3 YRS)	AVERAGE AD-GENERATED TOTAL PROFIT ROI	TOTAL AD-GENERATED PROFIT LIKELIHOOD	% OF SHORT-TERM PROFIT (3-6 MTHS)	AVERAGE AD-GENERATED SHORT-TERM PROFIT ROI	SHORT-TERM AD-GENERATED PROFIT LIKELIHOOD
ALL MEDIA	100%	£3.24	72%	100%	£1.51	58%
TV	71%	£4.20	86%	62%	£1.73	70%
PRINT	18%	£2.43	78%	22%	£1.44	61%
ONLINE VIDEO	4%	£2.35	67%	5%	£1.21	52%
RADIO	3%	£2.09	75%	5%	£1.61	62%
OUT OF HOME	3%	£1.15	48%	3%	£0.57	19%
ONLINE DISPLAY	1%	£0.84	40%	2%	£0.82	37%

Source: 'Profit Ability: the business case for advertising', November 2017
Ebiquity & Gain Theory

NB: Online Video includes Broadcaster VOD, YouTube, Facebook video & online programmatic video

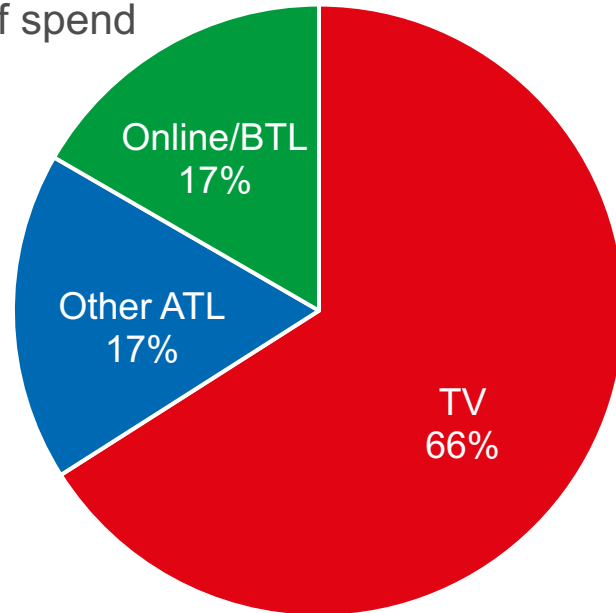
The optimal budget mix varies greatly by sector



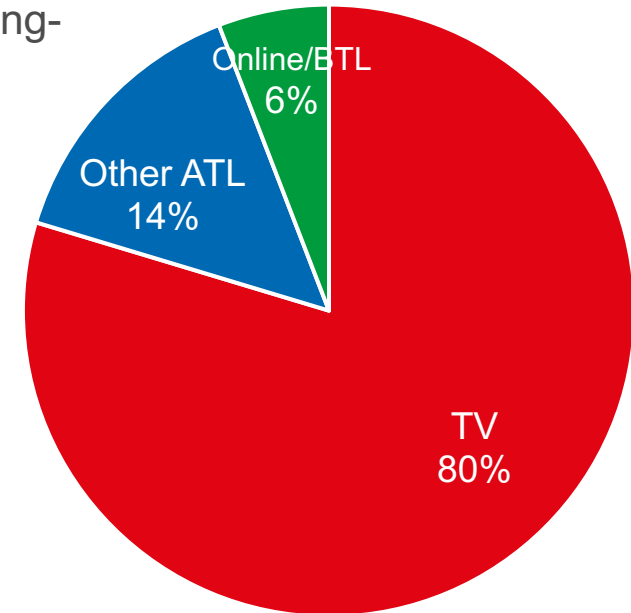
Source: 'Demand Generation' Nov 2019, MediaCom/Wavemaker/Gain Theory/Thinkbox
 NB: Channels with sufficient sector level benchmarks only. 20% online sales not minimising risk, further details re. Brand Size and Annual Media Spend for each category is included in the notes

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.

Sales uplift indexed by video type

STAS Index		
TV	129	-
BVOD	-	138
YouTube	-	112
Instagram	-	105
Facebook	-	100

Source: Karen Nelson-Field, Screenforce DACH "Not All Reach Is Equal"

SECTION FOUR

TV drives sales



Summary – TV drives sales

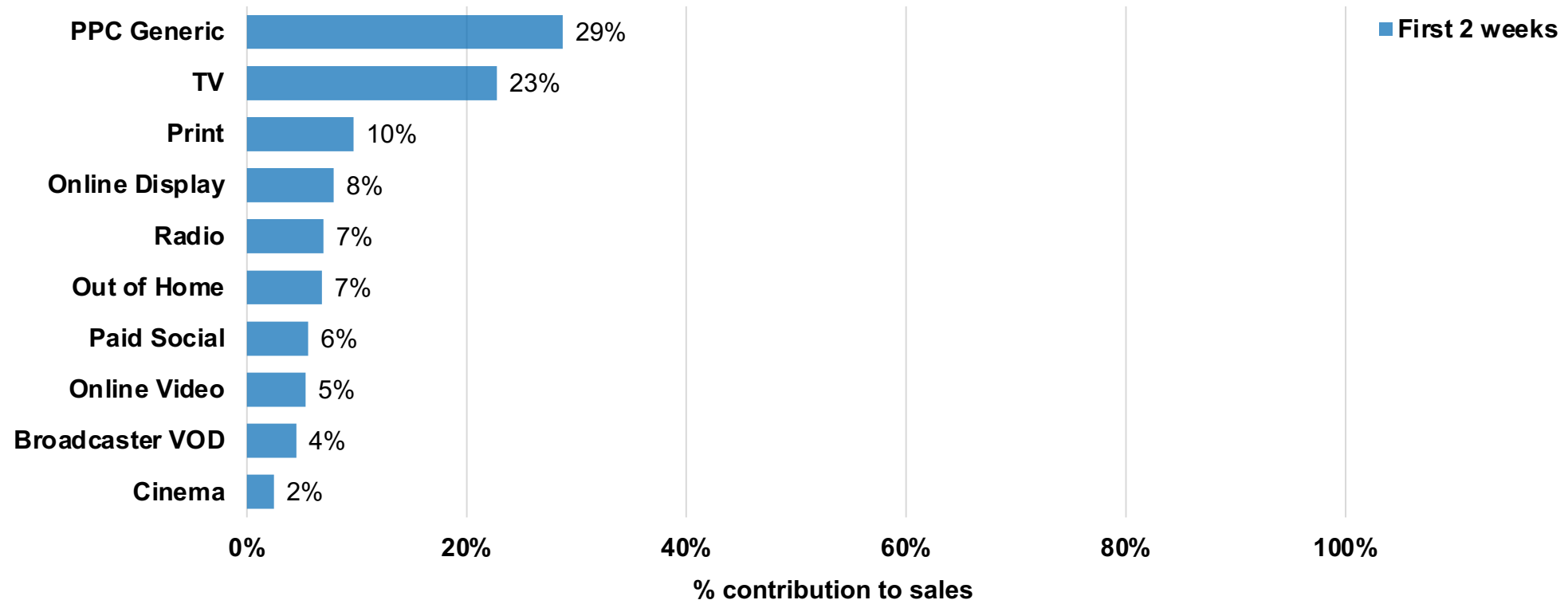
- TV positively contributes to overall sales, delivering 23% within two weeks of a campaign going live
- TV creates 62% of short term profit at the highest efficiency (all categories)
- TV drove uplifts in search for brands like Boomin and Serenata Flowers

Sources: please see notes



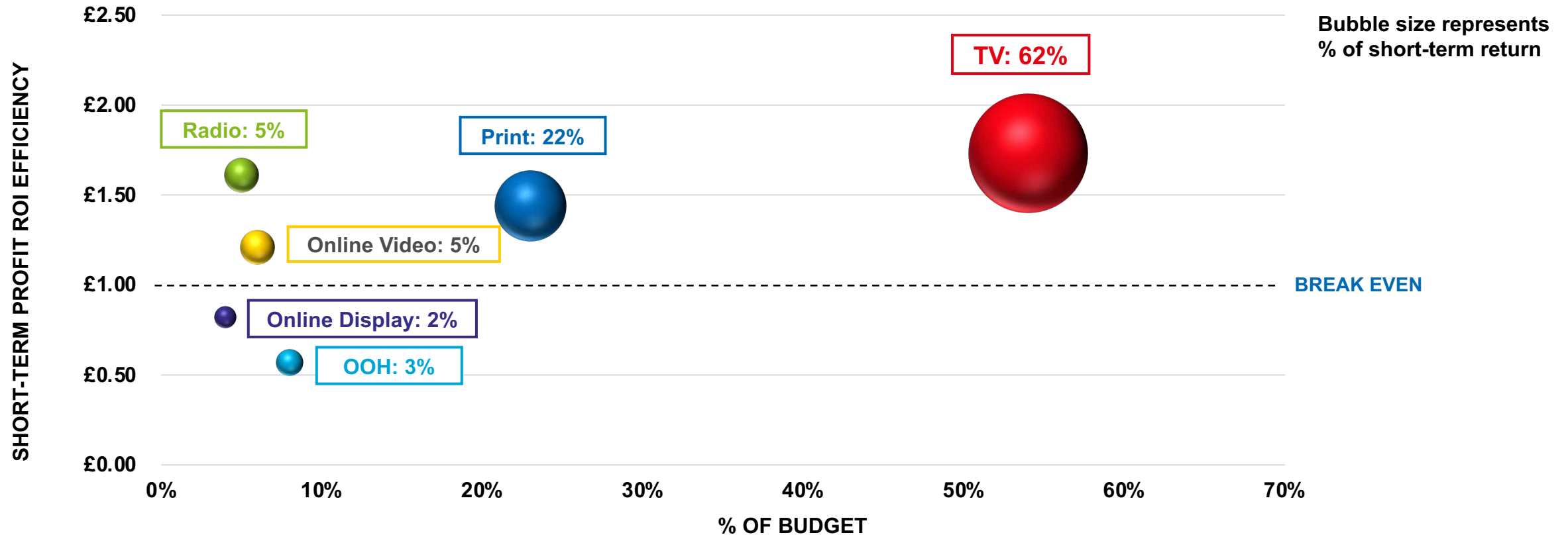
Alan Carr's Epic Gameshow, ITV

TV is a powerful means of delivering sales in the short term



Source: 'Demand Generation', Nov 2019, MediaCom/Wavemaker/Gain Theory

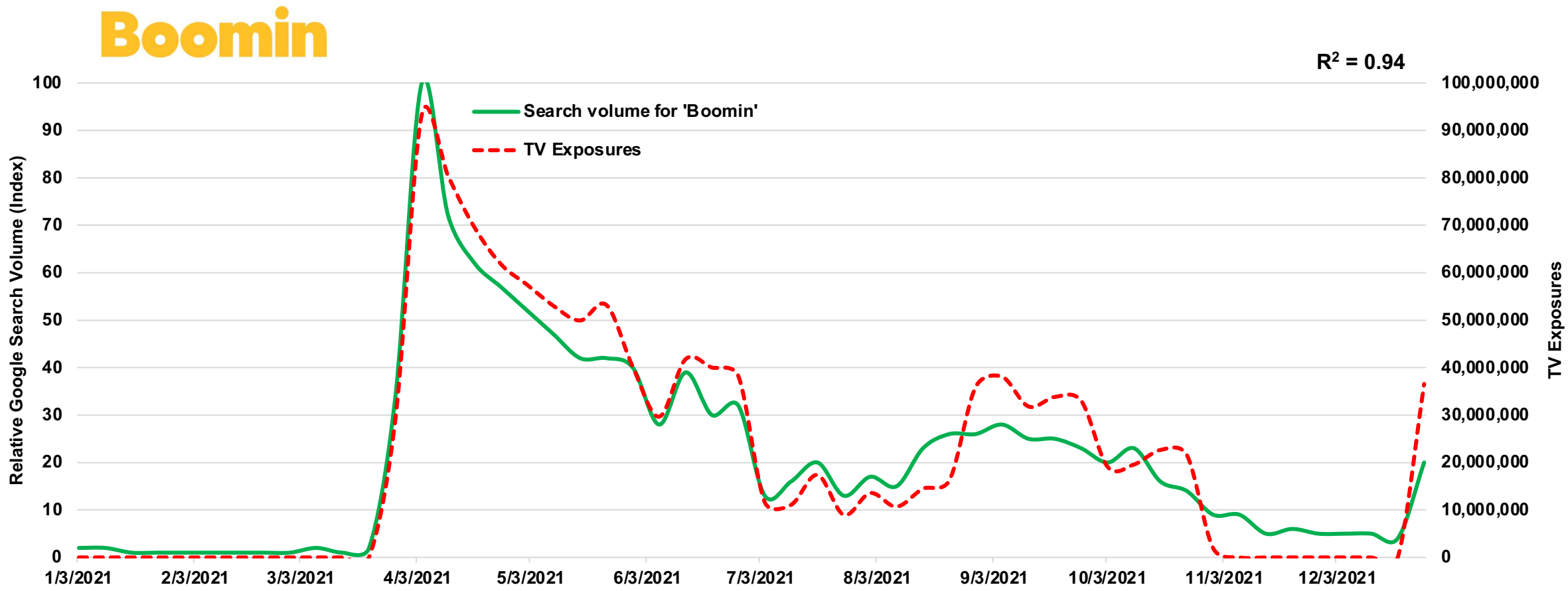
TV creates 62% of short-term profit at the highest efficiency (all categories)



Source: 'Profit Ability: the business case for advertising', November 2017
Ebiquity ROI campaign database (Feb'14-May'17). Campaign obs: 1954

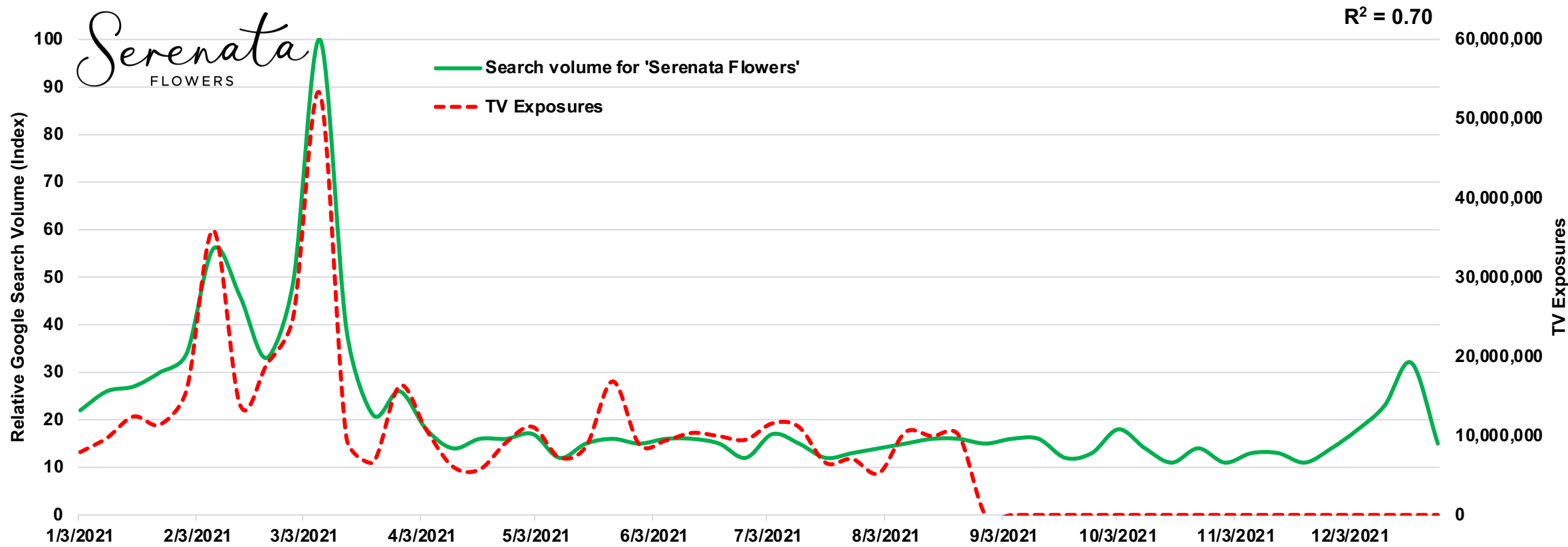
NB: Online Video includes Broadcaster VOD, YouTube, Facebook video & online programmatic video

Search for Boomin strongly relates to their TV activity



Source: BARB/Google Trends, Jan 2021 – Dec 2021

TV advertising drove huge uplifts in search for Serenata Flowers



Source: BARB/Google Trends, Jan 2021 – Dec 2021

A man with a beard and mustache, wearing a grey cable-knit sweater over a plaid shirt, looks upwards with a surprised expression. The background is a vibrant, chaotic scene with many people in a colorful, possibly outdoor setting, creating a sense of a large-scale event or festival.

SECTION FIVE

TV has unbeatable scale and reach

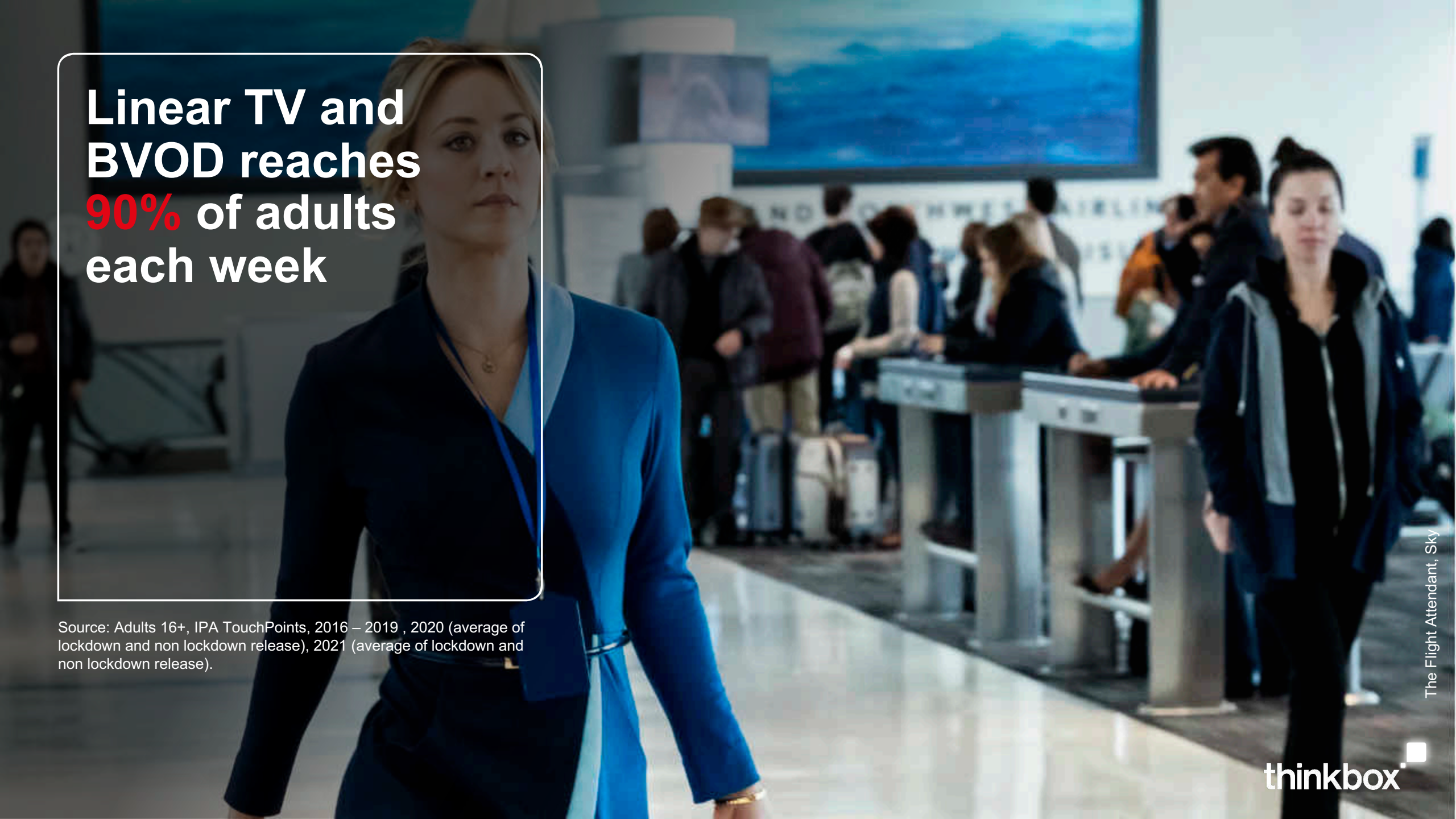
Summary - TV has unbeatable scale and reach

- Linear TV and broadcaster combined reaches 90% of the adult population each week
- Adults spend an average 11.4 hours per week watching commercial TV reaching 44 million individuals
- An average broadcast TV campaign of 400 TVRs in the UK gets 243 million views

Sources: please see notes









Celebrity Gogglebox, Channel 4



Linear TV and BVOD reaches **90%** of adults each week

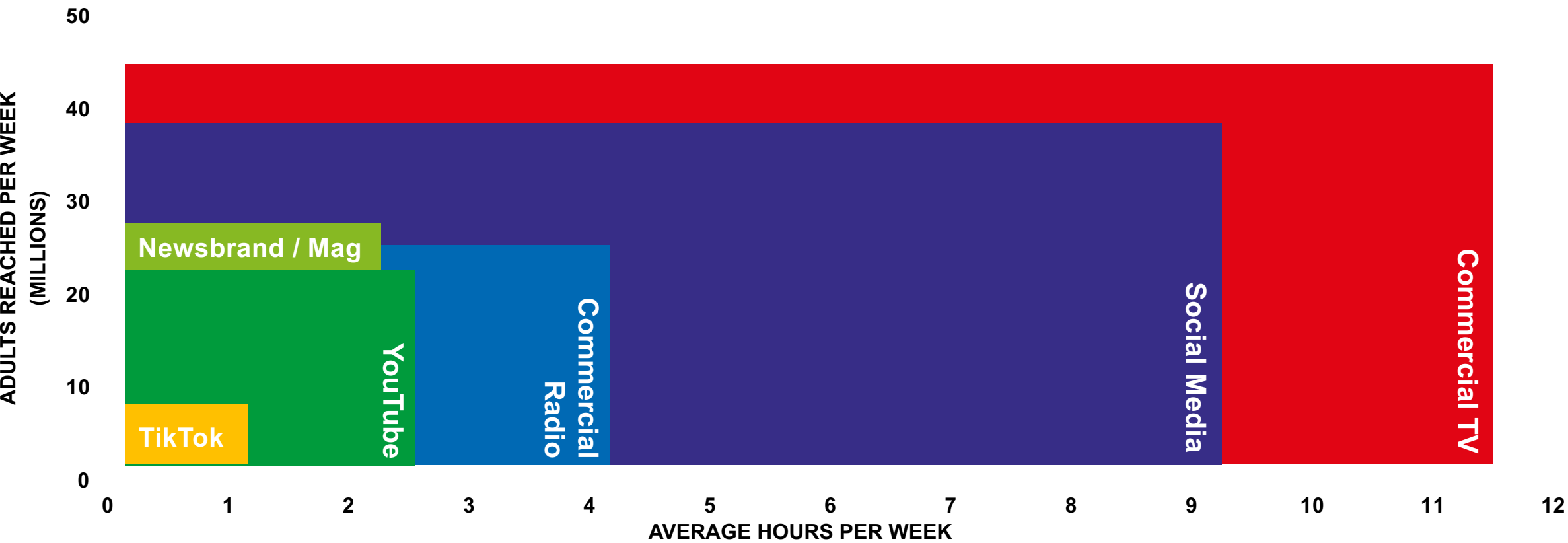
Source: Adults 16+, IPA TouchPoints, 2016 – 2019 , 2020 (average of lockdown and non lockdown release), 2021 (average of lockdown and non lockdown release).

Total TV weekly reach (linear TV + BVOD)

	Weekly Reach %	2016	2017	2018	2019	2020	2021
	Adults	98.1	96.4	95.0	93.4	91.0	90.3
	ABC1 adults	98.2	96.3	95.0	93.7	91.4	90.9
	16-34	96.4	93.4	89.9	86.5	81.4	80.1
	Men	97.6	95.5	94.3	91.7	90.2	89.5
	Women	98.6	97.2	95.7	94.9	91.7	91.2
	HP+CH	98.6	97.3	96.1	94.7	90.3	89.8

Source: IPA TouchPoints, 2016 – 2019 , 2020 (average of lockdown and non lockdown release), 2021 (average of lockdown and non lockdown release)

Commercial TV delivers scale

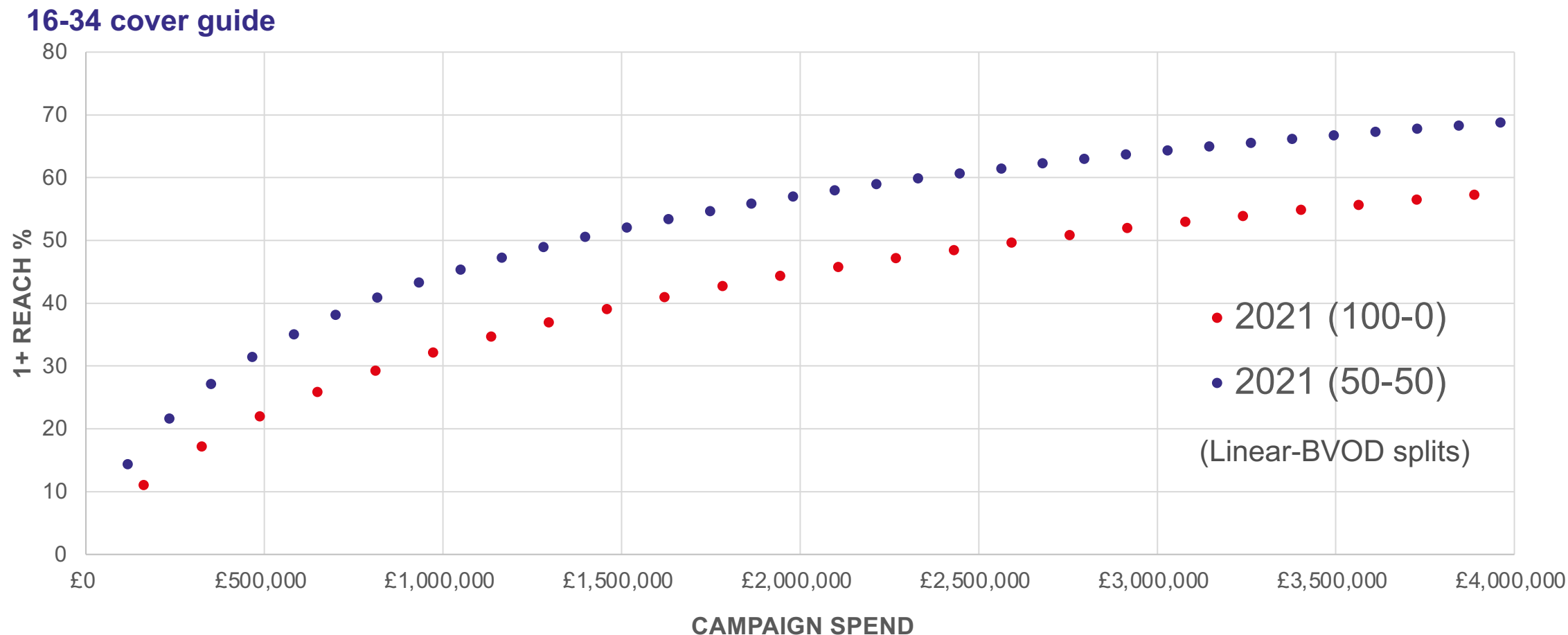


Source: IPA TouchPoints 2021, Wave 2 (Fieldwork Dates: 22nd Jun – 4th Sep). Base: adults 15+. Newspaper/magazine/TV figures include online/app consumption

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

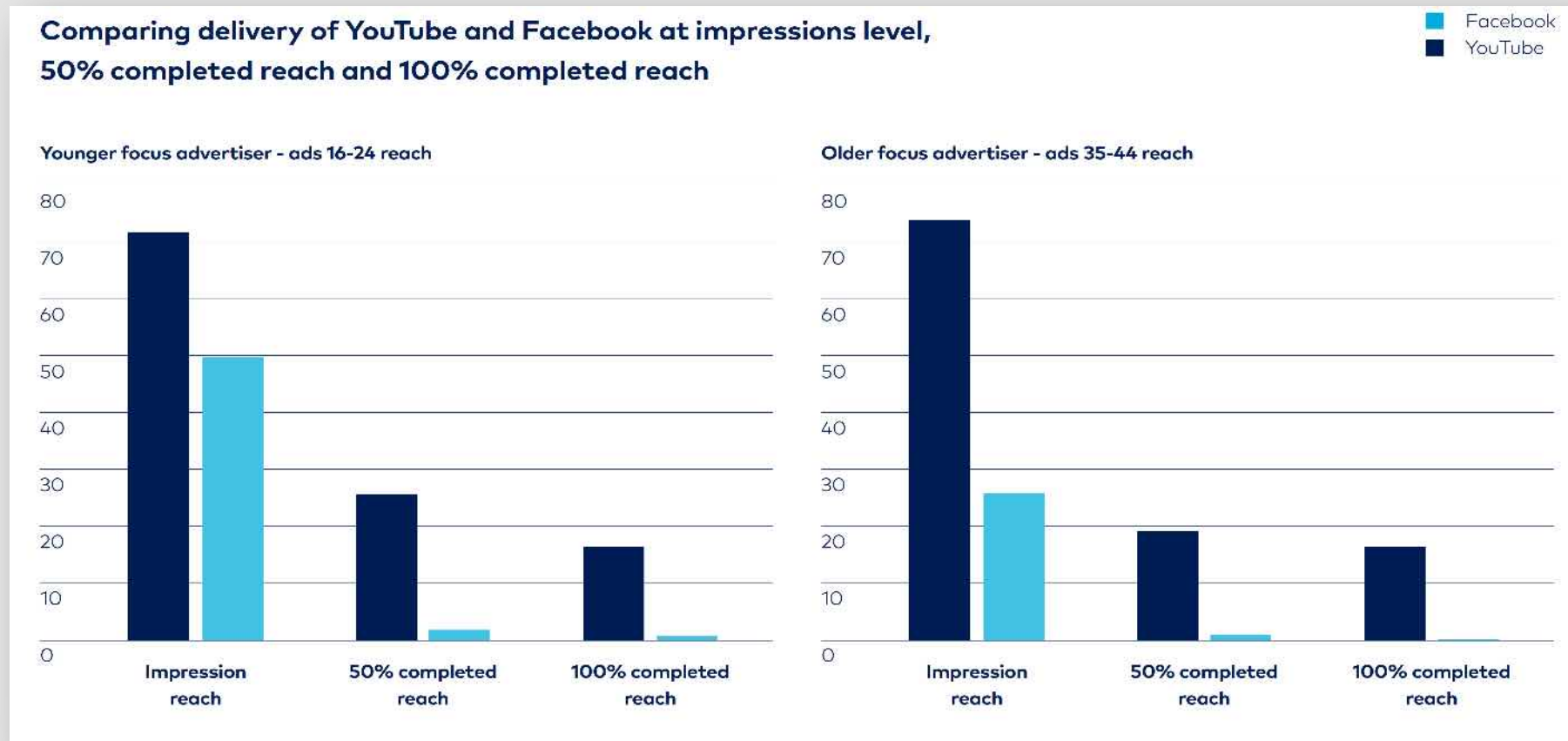
Source: BARB Dec 2021, Individuals

Total TV builds cost effective reach



Source: BARB – Techedge K2 BVOD Planner / Thinkbox estimated average CPTs (6 weeks Sept Oct 2021)

At high completion rates, online video struggles with reach



Source: Ebiquity, 'Mind the Gap', 2020

SECTION SIX

TV is *the* emotional
medium and builds
brand fame



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

- TV advertising is most likely to make you laugh (62%) and is the most liked (54%)
- 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

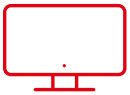







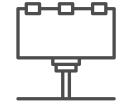
Sources: please see notes



McCain "Little Moments"

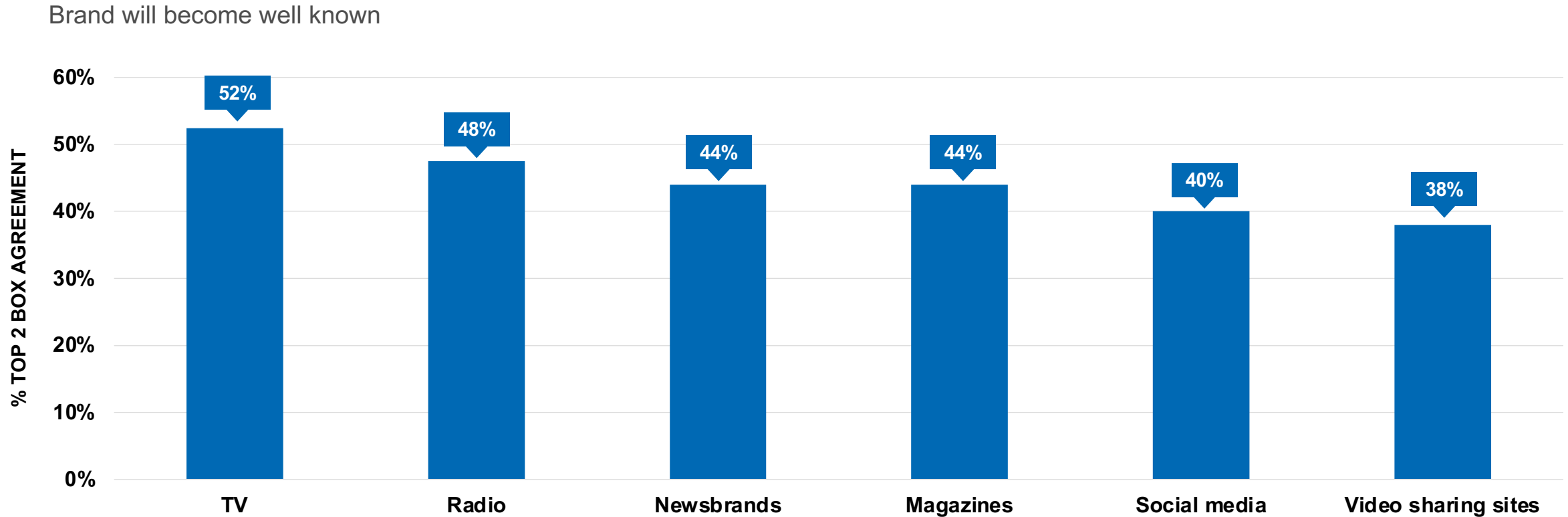
TV ads evoke emotion more than those in other media

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

	TV 	Social Media 	YouTube 	Website 	Newspapers 	Radio 	Magazines 	Search 	Outdoor 
makes you feel emotional	58%	9%	9%	6%	6%	5%	3%	2%	1%
makes you laugh	62%	13%	17%	8%	5%	7%	4%	2%	3%
you like	54%	13%	9%	11%	8%	6%	10%	3%	3%

Source: TV/Ad Nation, 2016, Ipsos Connect/Thinkbox, adults 15+
Question: 'In which, if any, of the following places are you most likely to find advertising that...'

TV advertising signals brand fame



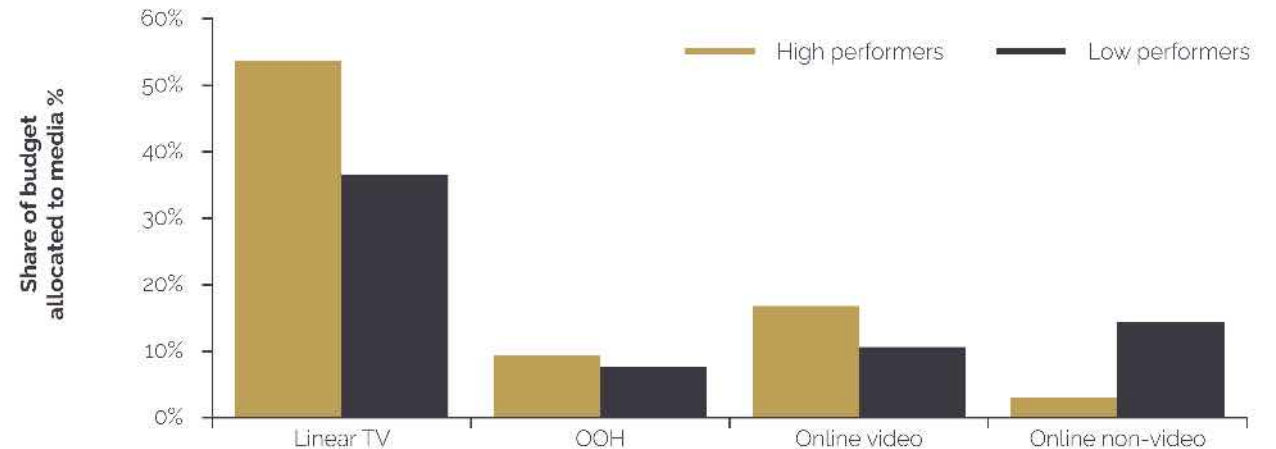
Source: Signalling Success, 2020, house51 / Thinkbox. Adults 16+. Top 2 box agreement "This brand will become well known"

“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.”

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

Figure 21

Performance is boosted by broad-reach conspicuous media



Source: IPA Databank, 2008-2018 creatively awarded cases

SECTION SEVEN

TV is great value



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 0.7p (in 2021)
- Average cost across TV advertising (linear and BVOD) for 30 seconds is two thirds the price of YouTube and less than a tenth the average cost of other online video
- When buying 1 million 16-34s on linear TV, you also get 3.5m 4-15s / 35+ for free!

Sources: please see notes



Average TV view costs **0.7p** (in 2021)

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: BARB, 2021, AA-WARC, ONS



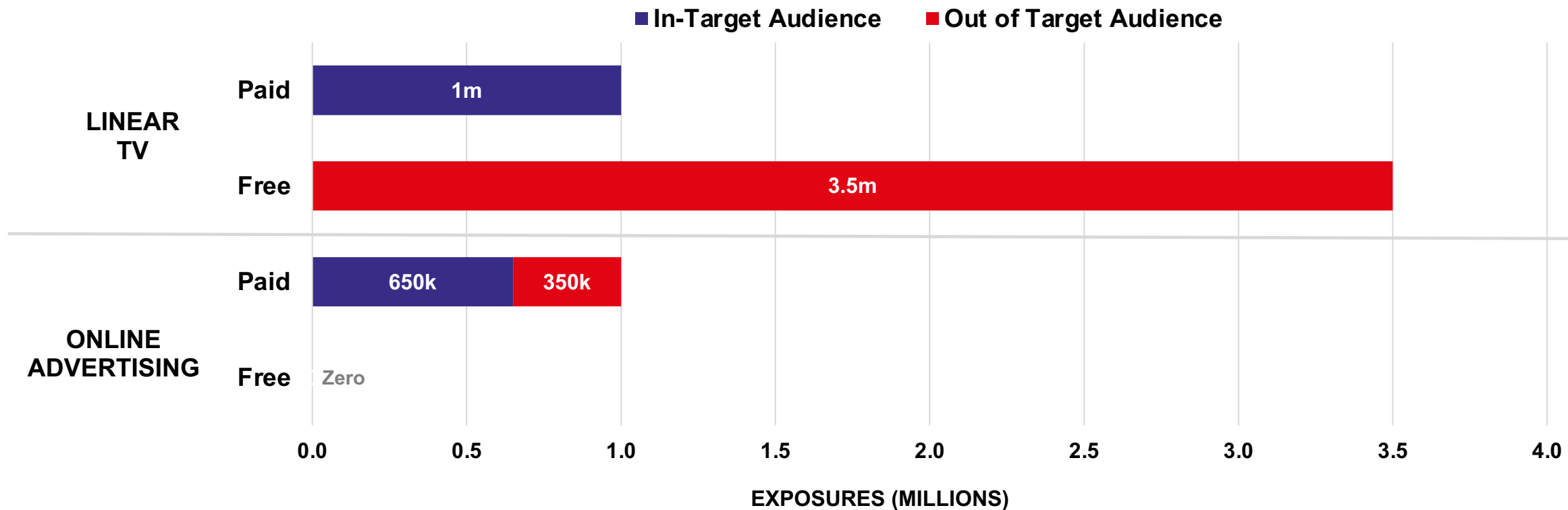
TV advertising is great value

	Revenue £ billion	Minutes of AV advertising per person, per day	Cost per Thousand (30 sec)
Broadcaster TV (Inc BVOD)	£5.1	15.7	£7
YouTube	£1.0	1.7	£13
All other online video	£3.7	0.6	£125

Source: 2021, BARB / Comscore / IPA TouchPoints 2021 / AA-WARC/ ONS

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

Find out more at Thinkbox.tv

Helping you get the best out of TV

Check out the other nickable charts

[Chart of the Month](#)

[Monthly Report](#)

[Ecommerce nickable charts](#)

[TV Partnerships nickable charts](#)

[Time spent viewing](#)

[Video Day](#)

[Signalling Success](#)



Apple iPhone, "Tracked"