How Marketing Influences Linear TV Performance

A Quantitative Research Study on the Impact of Marketing Campaigns targeting Linear TV Programming

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Swedish Title:
Hur marknadsföring påverkar linjära tittarsiffror

En kvantitativ forskningsstudie om effekterna av marknadsföringskampanjer med inriktning på linjär TV

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ABSTRACT
In reaction to the digitalisation that insinuates itself into every part of today’s society, this study explores if marketing efforts can still have an impact on the audience of the traditional media channel television. In collaboration with a media house supplying information on its Pay-TV channels, the investments and created impressions of 30 marketing campaigns, executed between 2014 and 2017 in Sweden, Denmark and Norway, were compared to their influence on channel-specific television viewership. The sourcing process included gathering marketing related information as well as accessing viewing data about the Nordic markets. The created individual reports on the key performance indicators including total television ratings and shares were visualised with the help of Pivot table graphs and could thereby display trend lines of the slot and channel performance affected by advertising. By analysing the relationships between marketing efforts and audience performance of all campaigns and all channels together, it can be said that there exists a downward correlation between the size of investment and the performance of the advertised new episodes. This opposes the individual channels whose performance cannot be adjoined to money spent. Furthermore, two out of three TV channels displayed short term performance surges connected to the marketing campaigns. Additionally, one channel demonstrated an increase in total channel performance during the promoted time frame, which could mean a spill over effect of show specific advertising to the other programmes.

Author Keywords
Traditional TV, Linear Programming, Television Panel, Marketing Analytics, Marketing Effectiveness, Quantitative Data, Data-Driven Marketing, Panel Research

1. INTRODUCTION
Digitalisation has touched every industry and global consumers in many different ways, revolutionising the method of invention, production and distribution of products and services as well as companies’ art of competition and monetisation. The exponentially rapid growth of digital technologies manifested itself in network connectivity, creation of connected devices, consumer power and the rise of commoditisation.

For the media industries engaging in content creation, this alteration caused a revolution on all fronts and greatly disrupted the penetration of the consumer market. Emerging new players have been dominating the creative industries on various sectors and have been forcing traditional media houses to rethink their content strategy. The revolution of the creative ecosystem is fully under way and the sources of revenue are commonly digital. [2] While non-digital parts of commerce have been stagnating or sinking, total revenues have ultimately been mounting “enabling a 1.2 percent annual growth for the creative sector overall since 2003” [1], measured till 2012.

The number of linear TV channels established in Europe rose by 46% between 2009 and 2015, gaining 1659 new TV channels – half of them attributed to HD - which are mostly represented in the markets UK, France and Germany [3]. Subscription revenues like those of premium cable and IPTV channels have almost doubled their size between 2003 and 2012, generating nearly €17 billion. “Furthermore, ownership of Internet-enabled mobile phones has increased by 42 percent in the past three years, leading to strong growth in time spent on the Internet via mobile devices.” [1]

The surge of time spent on the Internet is greatly pushed by the “(n)ew and improved product offerings for media consumption, e-commerce, and social networks [which] have contributed greatly to increased usage” [1]. According to the European Commission, 49% of Internet Users in the EU access audio-visual content or music online [4]. However, as video content has become a trade product for commerce, and social networks [which] have contributed greatly to increased usage” [1]. Against the growing perception that linear TV is dying, it continued to uphold a stable viewership and is still an effective way to reach a broad audience. Additionally, a recent study from ABC and Accenture reported that “linear TV still delivers a greater ROI than digital” [5].
In order to complement current developments in television and understand TV’s role in a changed media landscape, this study investigates past campaign efforts targeting linear TV programming in regard to their impact and capacity to leverage existing platforms and attract the intended target group. It is therefore vital to gain an accurate understanding of the metrics and dynamics of both the campaigns and show performances in the Nordic markets, to better guide the marketer’s calibration of strategy. In collaboration with a traditional media house that owns Pay-TV platforms, insights will be derived by data-driven measurements and streamlining efforts of digital as well as traditional marketing activities that seem connected to television performance.

The goal is to analyse all campaign information in a format that enables seeing them in their totality instead of their single effect. With this, a more apparent trend of their impact and success is visible, which ultimately will help the marketer to optimise the media strategy.

Firstly, an overview of the media landscape is drawn with an investigation on television audience numbers in the Nordic markets, followed by a delineation of pivotal audience measurement terms. Secondly, the scope of the study summarizes relevant points on the case company at hand. Thirdly, the method employed is clarified outlining the core procedure of this research, and the selected tactic of generating and analysing data. This is followed by the result section which provides more insights into the output structure, performance parameters and connected outcomes. In addition, the case discussion interprets the findings in consideration of posed research questions and formulates the impact of this study as well as considers limitations grounded on its design. Lastly, the conclusion reinstates the key research value ending with future recommendations.

2. THEORY

2.1. TV VIEWING IN THE NORDIC COUNTRIES

The degree to which Europeans use new technology and experiment with different content platforms varies greatly, yet, “the increased penetration of Internet television, IPTV, and OTT technologies such as Netflix, [Viaplay, HBO Nordic], Maxdome, Amazon Prime, and WhereverTV is blurring the lines between traditional linear TV and Internet usage” [1].

In the Nordics, total linear viewing follows a trend of losing audiences to digital platforms as well, although in 2010, viewing time in the Nordics peaked (figure 2) due to “the digitization of terrestrial networks, which greatly increased access to numerous TV channels” [6]. While television still remains relatively stable due to a shift within certain age groups, the amount of online video consumption and penetration of Internet television is increasing.

The daily reach of TV viewers stays highest in Norway, where television daily reached 72 percent of the population in 2016, followed by a daily reach of 64 percent in Sweden and 63 percent in Denmark.

Since 2000, Sweden and Denmark lost viewership the fastest by comparison to their Nordic neighbours, dropping 12 percent as well as 8 percent of their daily reach. [7]
Table 1. Television Rating Calculation

<table>
<thead>
<tr>
<th>Year</th>
<th>Denmark</th>
<th>Finland</th>
<th>Norway</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>136</td>
<td>124</td>
<td>122</td>
<td>111</td>
</tr>
<tr>
<td>2015</td>
<td>124</td>
<td>104</td>
<td>99</td>
<td>96</td>
</tr>
<tr>
<td>2016</td>
<td>146</td>
<td>117</td>
<td>104</td>
<td>99</td>
</tr>
</tbody>
</table>

Figure 4. TV viewing time among youth and young adults in the Nordic countries for 2010, 2015 and 2016 (minutes/day)

In particular, Nordic viewing of video-on-demand content has grown, boosted by the characteristic “high Internet use and access to broadband and devices such as computers, tablets and smartphones” [6]. With half of the Danish and Swedish population watching YouTube weekly, the platform is at the vanguard of streaming services. “Among the young audience, YouTube is more or less a daily habit. Among Swedish 9-19-year-olds, almost nine of ten (87 per cent) watch YouTube on a daily basis (93 per cent watch YouTube on a weekly basis)” [7]. Following Youtube, Netflix and public broadcasters attained the greatest audiences. [7] In 2015, “The Nordic 13-19-year-olds spend the most media time per day on YouTube (an average of 38 minutes/day), followed by Netflix (24 minutes), other streaming services (20 minutes), and any of the Nordic public service companies (20 minutes)” [7].

The Nordic countries Sweden, Denmark, Norway and Finland are the European leaders of subscription based streaming, representing almost 20 percent in Q4 2016, counting as many members as Germany and Italy together. Influenced by the comparably higher pricing, the consumers spent almost EUR 800 million in 2016 with Netflix taking “almost half the market in Q4, followed by Viaplay with 22 percent, HBO Nordic at 14 percent and C More with 6 percent” [8].

2.2. TELEVISION AUDIENCE MEASUREMENT

As most important key performance indicator (KPI) in measuring television audiences, ratings count the number of people tuning into a specific TV programme relative to a certain demographic in a universe (measured households in a given population) weighted by their time spent. Visualised in table 1, this translates to a rating of 20 percent. [9]

Table 2. Television Share Calculation

<table>
<thead>
<tr>
<th>Channel X A15-40 Share= 4/12=33%</th>
</tr>
</thead>
</table>

3. SCOPE OF THE STUDY

Marketing has continuously been part of the strategy mix, reaching out to potentially new consumers, stimulating exchange and driving involvement. While marketing activities have always been used extensively to drive viewership for traditional television and slot specific programming, their overall performance has rarely received an equally encompassing evaluation and comparison of their combined channel specific efforts. In order to reliably assess impact and effects on programmes and improve campaign investments, measurement of marketing metrics and relative performance have to be obtained and evaluated. However, campaign tracking and correct data analysis face numerous challenges: “complexity, unpredictability of contextual events, confounding influences, lack of comparison groups, unfamiliarity with appropriate methods, and uncertainty about the explanatory value of outcomes. Most often, evaluators fall back on simply tracking frequency and reach” [10].

In collaboration with the case company delivering sector-internal information as well as data entry points, this research sought out to analyse internal marketing efforts in regard to their effect on the product performance in the Swedish, Danish and Norwegian market. In order to respect the company’s regulatory framework on industry sensitive information and to prevent the publication of internal data, the company as well as the specific publication channels and campaign information will remain unnamed. Above all a cable television network with further stakes in the movie-making business, the company controls a large portfolio of popular programming. As a major media conglomerate, the company has not been unaffected by the change that was described in the prior sections. Although the TV channels among the assets remained strong and continue to have cultural impact, the combat to decrypt the multifaceted formula of millennial language and stay a content leader within the target group has affected its struggle. In order to
react to the digital transformation of the past decade, the firm has been progressively restructuring their value proposition and direct transformation of the entire internal structure.

The aim of this study is to analyse the impact of marketing campaigns on regional traditional linear TV programmes, in order to optimise the demonstrated efforts and envisage advertising investments in terms of their effectiveness. The past marketing activities of three channels were systematically evaluated and their input compared to their influence on the target audience. This research study set out to investigate marketing operations and their connection with the resulting television performance in their entirety.

- Which combined marketing efforts had the greatest impact on their targeted linear TV performance?
- Could the slot specific campaigns create a spill-over effect into programmes airing before or after the advertised slot?
- And do the slot specific operations drive up the performance of the channels themselves?

As most important forms of audience measurement, television viewer ratings (TVR) and television shares adequately indicate the success level of content and programming, and thus remain among the key performance indicators in this study.

4. METHOD

In order to fulfil the objectives of this study – to analyse the impact of advertising on linear television programming, a quantitative research study was conducted by using factual, sector internal company data and by accessing television audience metrics. The process has been systematically split into four different project phases, and received fortnightly status updates with the head of research insights and analytics as well as the senior marketing responsible for the television channels in question, whose departments mutually facilitated data access.

First, existing data and internal company structures have been investigated and the underlying framework for the later analysis was established.

In the first weeks on location, the infrastructure of internal communication systems as well as software training was introduced and set up. As one of “the leading software supplier to broadcasters and media agencies covering over 60 markets globally” [11], TechEdge provided the in-house software AdvantEdge which was used to access performance data on Nordic television viewership. Used by major international broadcasters and media agencies for analysis, AdvantEdge functions as intermediary supplying national panel data on households where a people meter is attached to their TV set, to measure how much TV and what content and advertising is being watched and who in the household is viewing. Consequently, the software is able to supply variable, market-specific insights into different demographic datasets within a flexible, cross tab output that can individually be downloaded as comprehensive Excel reports as well.

The second and most time-consuming step during the process was sourcing the records on the marketing campaigns concerning the specific channels and categorizing the given information. Since the amount of data was extensive, a table structure in Excel was set up in a way that enabled analysis with Pivot-tables afterwards. Operating under the umbrella of the media house in question, three television channels – which will further on be classified as Channel 1, 2, and 3 – were specifically analysed according to their paid marketing activities. Throughout the sourcing process, the following Key Performance Indicators were identified as pivotal: Budget, Money Spent, Reach, Delivered Impressions, (Video) Views and Clicks.

Thirdly, the focus was set on the external television performance numbers which could be put out via reports in AdvantEdge. While setting up queries, input variables were selected and the fitting modules selected. All modules contained a window with to-be-selected fields Areas, Period, Daypart, Targets (Subgroups: Index, Universe), Channels, and Analysis Sets (Reach and Frequency, Share, Daily Reach). Campaign specific input variables were constructed through formulas in Excel that combined the campaign data and fitted it into a software internal format of calculation. The main module of choice was the Time Module for its possibility to analyse different time periods as well as dayparts.

![Table 3. Example of software internal input format (Period, Daypart) for one specific campaign](image)

Fourthly, after concluding the numbers from marketing and television performance, the data analysis was set forth in Pivot tables for a better compilation and oversight. For its adaptability and ability of singling out different campaigns and their internal connection to other variables, the pivot-table structure enabled tracing various relationships between marketing activities and television performance and permitted to delineate the outcome more clearly. Through visualisation in Pivot graphs, trends could be distinguished regarding the three channels and their internal activities, and interpretations were made on which marketing operations worked on a channel specific level.
5. RESULTS

5.1. CHANNEL STRUCTURE

5.1.1. Campaigns and Markets
Each of the three television channels encompassed one to five major, yearly marketing campaigns in the markets Sweden, Denmark and Norway. For this study, the marketing campaign data spanned the time between 2014 and the beginning of 2017. In total, 32 singular marketing campaigns could have been analysed, but later corrected to 30, due to absent data. Channel 1 delivered the most extensive campaign collection with 17 recorded campaigns ranging between the recognised period and targeting the audience, Age 6-11, in the two major markets Sweden and Denmark (2x 2014 – both in Sweden, 9x2015 – 5 in Sweden, 4 in Denmark, 6x2016 – 3 in Sweden, 3 in Denmark). Channel 2 conveyed the efforts on six campaigns between 2015 and 2016 (3x2015 – 2 in Sweden, 1 in Norway; 3x 2016 – 2 in Sweden, 1 in Norway) targeting the population aged 20-44 years, while Channel 3 delivered follow-ups on seven campaigns that were put into practise between 2015 and 2017 (1x2015 – Sweden; 4x2016 – Sweden; 2x2017 – in Sweden and Denmark) and targeted 15-40 year olds.

<table>
<thead>
<tr>
<th>Channel 1</th>
<th>Channel 2</th>
<th>Channel 3</th>
<th>Total Years</th>
<th>Total Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sweden</td>
<td>2014</td>
<td>2015</td>
<td>2016</td>
<td>2017</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>5</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>8</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Denmark</td>
<td>2014</td>
<td>2015</td>
<td>2016</td>
<td>2017</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>4</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>8</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Norway</td>
<td>2014</td>
<td>2015</td>
<td>2016</td>
<td>2017</td>
</tr>
<tr>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sum of specific campaigns</td>
<td>17</td>
<td>6</td>
<td>7</td>
<td>30</td>
</tr>
</tbody>
</table>

Table 4. Campaign count for channels and targeted markets

Paid activities could be classified as digitally bought advertising and outdoor advertising. Digital media included display ads on Facebook and Instagram, Influencer Marketing, Affiliate Marketing, Native Advertising, TV Advertising, and promotion on podcasts and in cinemas. Outdoor advertising classified all activities defined as OOH. “Out-of-home media refers to any type of communication that reaches a consumer when they are outside of their home“ [12], including billboards, walls, advertising posters, digital and mobile billboards.

5.1.2. Audience Target, Universe and Sample Size
Each channel focused their advertising on two of the three major Nordic markets, implementing campaigns to counteract falling audience numbers. The target markets varied due to the individually targeted channel demographic, yet all included both the male and female population of the country. Due to measures of data sensitivity, the concrete demographics will remain in disclosure.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Campaign</th>
<th>Country</th>
<th>National</th>
<th>Target % of Universe</th>
<th>Universe</th>
<th>Sample Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Channel 1</td>
<td>Avg. of all campaigns</td>
<td>Sweden</td>
<td>Nat</td>
<td>7,3%</td>
<td>691399</td>
<td>202</td>
</tr>
<tr>
<td>Channel 1</td>
<td>Avg. of all campaigns</td>
<td>Denmark</td>
<td>Nat</td>
<td>7,9%</td>
<td>397051</td>
<td>612</td>
</tr>
<tr>
<td>Channel 2</td>
<td>Avg. of all campaigns</td>
<td>Sweden</td>
<td>Nat</td>
<td>33,9%</td>
<td>3204707</td>
<td>665</td>
</tr>
<tr>
<td>Channel 2</td>
<td>Avg. of all campaigns</td>
<td>Norway</td>
<td>Nat</td>
<td>26,4%</td>
<td>1227188</td>
<td>567</td>
</tr>
<tr>
<td>Channel 3</td>
<td>Avg. of all campaigns</td>
<td>Norway</td>
<td>Nat</td>
<td>33,9%</td>
<td>3212392</td>
<td>683</td>
</tr>
<tr>
<td>Channel 3</td>
<td>Avg. of all campaigns</td>
<td>Norway</td>
<td>Nat</td>
<td>31,2%</td>
<td>1646165</td>
<td>2534</td>
</tr>
</tbody>
</table>

Table 5. Average universe size for channels and targeted markets

The size of the universe is dependent on the specific selection chosen (for example by region or cable households), but remained on National since there were no specifications needed in this study. Target percentage of the universe describes the number of people in a universe that belongs to the chosen target frame. The sample size describes the „number of panel members in the target, filtered by the general universe chosen for the report“ [11].

5.2. PERFORMANCE PARAMETER

5.2.1. Marketing Key Performance Indicators
As previously mentioned, the focus of campaign performance markers was set on the paid media of the 30 individual campaign activities. During the process, all possible retractable information on the past individual campaign activities was collected and put into an excel structure. Still, the key performance indicators seen as the most valuable and decisive were used for subsequent analysis. Budget and actual Money Spent can be accounted as input variables that defined the scope of the campaign itself. When calculating the average percent of spent money to set budget, delivered by the marketing managers, the average value was 92 percent for all 30 campaigns (Channel 1 had an average of 93 percent, Channel 2 an average of 83 percent, and Channel 3 an average of 100 percent).
Reach was used for indicating social media reach and does not define actual delivered impressions, but potential impressions as an estimation on how many people had the availability to see certain contents. Delivered Impressions include each singular recorded view, also calculating each view of a recurrent person. (Video) Views summed up views from platforms like YouTube who actually display moving video content or recorded views, i.e. from blogs. Clicks were reported as information on how many people actually clicked on the advertisement they saw, connecting the impression with a performed activity. For a more general perception on the sum of channel-specific campaigns, the term Total Gross Impressions was created and defined within this research. Total Gross Impressions were automatically set as sum of the indicators Reach, Delivered Impressions, (Video) Views and Clicks. Unique Impressions/Visitors were not taken into account since they are already calculated within the Delivered Impressions.

5.2.2. Selected Analysis Units and Split Variables

Split Variables describe the frame of the query, setting different specifications in the reported table, for example defining area, target, daypart and time settings. Units on the other hand define the variables to be put out. In this research, units included the average television ratings (TVR (avg)), shares (Sh %), ‘000 (avg), count, Avg. Mins (All), defined in the table below.

### Table 7. Definition of selected Analysis Units

<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TVR (avg) / Rating</td>
<td>The average of a target audience who has viewed a programme, daypart, spot, minute, etc. expressed as average of that target audience universe.</td>
</tr>
<tr>
<td>Shares in %</td>
<td>Share of viewing in the time period of the event</td>
</tr>
<tr>
<td>’000 (avg.)</td>
<td>The average number of viewers for the events in absolute numbers (thousands)</td>
</tr>
<tr>
<td>Count</td>
<td>The number of events (episodes displayed)</td>
</tr>
<tr>
<td>Avg. Mins (All)</td>
<td>Average Minutes (All Viewers), also referred to as Average Time Viewed. This is the number of minutes viewed by each person in average by viewers who fulfill definite cover criteria.</td>
</tr>
</tbody>
</table>

### Daypart and Multi Period

Each campaign advertised certain premiere episodes and promoted a certain television slot to be watched during the week. To be able to account for slot performance after airing, a software report got generated for each campaign according to each campaign’s specific dates and time frame. For a better overview on the table exports, the description takes in example data from the table 7.

### Table 8. Example of Software Output in Time Analysis.

The Daypart displays different time intervals in regard to the campaign. The frame 0600-2059 takes in all data from 6:00 till 20:59 due to the channel-specific in-house definition as Full Day. After, the Lead In to Slot time, 1735-1804, is calculated, which counts half an hour, followed by the airing time of the new episodes which in the example report ran from 18:05 till 18:35. Last, the Lead Out time, from 18:26 till 19:05 is reported and also accounts for half an hour.

The Multi Period Field calculates different date-frames; first, -12fm Mon-Fri for a general impression on the performance from Monday till Friday counting the last 12 full months. Then, the four weeks prior to the advertised premiere dates are taken into account, displaying the year and weeks together with the promoted week days, 1635-1638 Mon-Fri. What follows next is the promoted time frame 260916-141016 Mon-Fri, chronicling the length of the premiere airings - all the airings of new episodes promoted in the marketing campaign. Last, the four weeks after the last date with an episode premiere is counted, 1642-1645 Mon-Fri.

All campaign exports were done twice for each of the 30 campaigns, in order to analyse the exact television performance and dependencies on one specific advertised show time, as well as the performance of the whole channel itself. This provided the ability to check if the slot-specific advertising and targeting of people to watch within one hour of the day had any effect on the channel itself. When reporting on this, the data entry of daypart was shortened to the Full Day view, as well as promoted week days, i.e. Mon-Fri, deleted in the Multi Period Field (table 9).
5.3. OUTPUT

5.3.1. MARKETING

The following marketing performance charts illustrate the relationship between the variables Money Spent (in 10,000 $US) and collected Gross Impressions (in 1 Mil.). When calculating all campaigns of the three channels together (table 10), it is visible that, over the years, there is a downward drive both in spent money as well as induced impressions that correlates with the ratings and shares of each year (table 11).

Table 9. Example of Software Output in Channel Analysis.

<table>
<thead>
<tr>
<th>Daypart</th>
<th>Multi Period</th>
<th>TVR (avg) in %</th>
<th>Shrs (avg)</th>
<th>'000 (avg)</th>
<th>Count</th>
<th>Avg Mins (All)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0700-2059</td>
<td>12fm</td>
<td>0.42</td>
<td>7.03</td>
<td>1.69</td>
<td>365.00</td>
<td>3.57</td>
</tr>
<tr>
<td>0700-2059</td>
<td>1635-1638</td>
<td>0.40</td>
<td>7.21</td>
<td>1.58</td>
<td>28.00</td>
<td>3.39</td>
</tr>
<tr>
<td>0700-2059</td>
<td>1539-1541</td>
<td>0.59</td>
<td>8.48</td>
<td>2.25</td>
<td>21.00</td>
<td>4.93</td>
</tr>
<tr>
<td>0700-2059</td>
<td>1642-1645</td>
<td>0.59</td>
<td>9.22</td>
<td>2.34</td>
<td>28.00</td>
<td>4.95</td>
</tr>
<tr>
<td>Total</td>
<td>Total</td>
<td>0.43</td>
<td>7.12</td>
<td>1.72</td>
<td>386.00</td>
<td>3.64</td>
</tr>
</tbody>
</table>

Table 10. Channel 1-3, Total Campaign Performance.

Table 11. Channel 1-3, Total Linear Television Performance.

Looking at the separate outcome of invested Money Spent (in 10,000 $US) and performed Gross Impressions (in 1 Mil.) of Channel 1 (table 12), it is noticeable that the size of input seems unrelated to the actual ratings and shares. In 2016, rating and share of the main premiere time were the highest, although input variables were relatively low, and also had the highest growth rate compared to four weeks prior (48 percent).

In 2015, Channel 2 shows declining performances compared to the rating and share measuring four weeks prior. However, in 2016, rating grew 133 percent and shares 49 percent compared to the main time slot four weeks before.

Table 12. Channel 1, Total Campaign and TV performance.

For Channel 3, 2016 seemed to have been most impactful, when comparing marketing investments and rise of premiere rating and shares, assumingly because of well invested marketing activities.

Table 13. Channel 2, Total Campaign and TV performance.

Table 14. Channel 3, Total Campaign and TV performance.

5.3.2. TIME ANALYSIS

5.3.2.1. Ratings

When looking more specifically on time changes and spill over effects, Channel 1 could record a 28 percent increase from 4w premiere to actual premiere time. Furthermore, a 11.5 percent increase in rating from the Lead In to Premiere time was measured.

Table 15. Channel 1, Total Campaign and TV performance.
Collectively, the marketing efforts of Channel 2 seem to have had an impact on the campaigned time slot, since premiere ratings grew 57 percent from the Lead In, as well as counted a growth rate of 83 percent to the same time slot in the four weeks leading up.

Table 16. Channel 2, Total Campaign Performance in Ratings.

The average total rating of Channel 3 shows a growth of 29 percent between Lead In and Premieres during the four weeks prior, but remained stable between the actual Lead In and advertised Premiere time. The Lead In Time continued to collectively rise by 11 percent in the four weeks after the premiere airings.

Table 17. Channel 3, Total Campaign Performance in Ratings.

5.3.2.2. Shares

Channel 1 could grow its share performance compared to four weeks before, but could not show a significant escalation between Lead In and Premiere Times (table 18).

Table 18. Channel 1, Total Campaign Performance in Shares.

Channel 2 shows a dramatic surge of shares between Lead In and Premieres during the four weeks prior (plus 91 percent) as well as during the advertised time (plus 65 percent), which could be deducted as a communally effective audience response to marketing activities which then again decreased in the four weeks after.

Table 19. Channel 2, Total Campaign Performance in Shares.

Channel 3 could record the biggest surge of average total shares during the four weeks prior to premiere airings. There was a rise of 16 percent between -4w Lead In to main Lead In, as well as a growth of 7.5 percent between -4w premiere to main premieres.

Table 20. Channel 3, Total Campaign Performance in Shares.
5.3.2. CHANNEL ANALYSIS

Though there was a growth of slot ratings and shares between -4w premieres and main premieres, this rise did not seem to affect the whole channel performance, which jointly lost shares compared to four weeks prior by 5.5 percent.

Table 21. Channels 1, Total Campaign Performance, Comparing Slot to Total Channel Performance.

Channel 2 displays a significant upsurge of ratings (83 percent) and shares (27 percent) slot-wise compared to four weeks prior, but also seems to lift up the average channel ratings (50 percent) and shares (plus 37 percent) with them.

Table 22. Channels 2, Total Campaign Performance, Comparing Slot to Total Channel Performance.

Opposite to Channel 1 and 2, Channel 3 displayed a higher share performance on the full channel compared to the actual advertised slot.

Table 23. Channels 3, Total Campaign Performance, Comparing Slot to Total Channel Performance.

6. DISCUSSION

The purpose of this study was to dissect different channel efforts and research if channel own marketing operations had the intended impact – which ultimately equals an increase of the key performance indicators. As this paper focuses on the most imposing indicators, it displays the selected graphs on whose grounds can be argued on most. Naturally, measurements like for example Rating in thousands, ‘000 (avg), were looked into and can underline the results when potentially extending this study in the future.

When considering the total investments of the three channels and their combined effect on linear television programming, table 11 and 12 show that there exists a direct downward trend over years on the accords of how much money got invested and how many impressions were created along with the total linear television performance. However, it can be seen that from 2014 till 2016, all campaigns calculated together resulted in a positive growth from premiere ratings and shares in four weeks prior to the promoted premiere times. It needs to be mentioned that the exceptional performance in 2014 can solely be attributed to Channel 1 which calculates in two campaigns in that year, while the lowest performance is generated in 2017 calculated by two campaigns of Channel 3.

When dissecting the channels individually, Channel 1 shows overall very positive performances for each year. However, there seems to be no collective reason that attributes an increase in ratings or shares to the invested money. All campaigns in 2014 had a positive impact in ratings and shares, which could be further sustained over the four weeks after the advertised airings. In 2016, the marketing efforts resulted in a total rating increase of 48 percent and of 28 percent of total slot shares compared to the performances in the premiere time four weeks prior.

In regard to the total Rating performance (all campaigns, all years), Channel 1 does not exhibit a growth between -4w Lead In and -4w Premieres, but displays a slight growth of 28 percent between -4w Premieres to the promoted premieres which leads to the deduction that most of the campaigns succeeded in raising viewership for the new episodes (table 15). This impact lasts at least for the time of new episode airings, but also remains unchanged for the four weeks after. In terms of shares (table 18), a growth could be measured between -4w Lead In and the Lead In of the Premieres (7.4 percent) and more significantly between -4w Premieres and Premiere Airings (17.8 percent). During the four weeks after the new episode airings, the ratings seem to slowly sink again.

Assessing Channel 2 (table 13), the combined show-specific marketing efforts in 2015 did not influence the rating or share performance of the advertised slot positively, but rather exhibits a decrease in performance compared to the airings four weeks prior. Although there was less money spent on marketing campaigns in 2016, the
main slot performed exceptionally well compared to the airings in the four weeks before: a steep rise by 133 percent in total ratings as well as by 49 percent in total shares.

Calculating all campaigns of 2015 and 2016, the campaign investments led to a short term surge of premiere ratings and shares compared to the performance in the four weeks prior (table 16, table 19). The slot rating performance showed an upsurge of 73 percent (-4w Lead In to Lead In Performance) and 83,3 percent in the advertised time slot (-4w Premieres to Premieres), which testifies the marketing campaigns a short term effect. The slot share performance showcases strong spill over performances from Lead In into Premiere airings, and also the premiere airings was measured 27 percent higher compared to their performance during the four weeks prior.

When evaluating the campaign efforts for Channel 3, table 14 visualises an increase of premiere ratings as well as shares during the airings of new episodes. In particular, all campaigns of 2016 combined seemed to have had a great impact at a lower budget than in 2015. Compared to the premieres four weeks prior, the rating rose by 140 percent and shares by 107 percent.

The total campaign performance in ratings (all campaigns of all years) does not validate an effect on the promoted time frame, but rather on the Lead In time which shows an overall upward trend (table17). Assessing the average total share performance, a slight increase can be noted between -4w Lead In to Lead In (16 percent) as well as -4w Premieres to Premieres (7,5 percent), which leads to the assumption that the advertising activities did not have any significant impact on television audiences.

Moreover, this research inquired if slot specific operations were able to affect the rest of the channel programming during the campaign time frame.

When looking at Channel 1 (table 21), it can be stated that, although the marketing seemed to have increased the slot performance, it did not have an accumulated spill over effect on the rest of the channel programmes.

For Channel 2 however, the whole TV channel seemed to have gained a positive impact of the more specific advertising campaigns, increasing ratings and shares (-4w premiers to premiers) by 50 percent as well as 37 percent (table 22). This leads to the assumption that the audience of Channel 2 is more perceptive to the whole channel offering when marketing activities are running at that time.

The operations of Channel 3 do not visualise any spill over effect between the advertised time frames and the whole channel, which suggests that marketing activities exclusively influence the advertised time frames (table 23).

6.1. PANEL VOLATILITY ANALYSIS
Based on an in-house investigation to understand whether a change in channel performance was indeed significant or can be solely based on volatility, the television markets treated in this paper were marked as highly volatile.

This helps to understand statistically relevant changes on a channel-level and if necessary, arrange alterations within programming.

Since the Panel Volatility Analysis broke down daily channel ratings using time series decomposition, the results of that report can hereby be noted, but were not further weighed in the given study since data mostly calculates with specific slot performance in a campaign period and during the four weeks before and after the new episode airings.

6.2. LIMITATIONS AND FUTURE RESEARCH
As the linear television performance is based on panel data, it is expected that each viewer at that time is taken into the equation. This requires the panel users to track themselves accordingly and correctly, which cannot be guaranteed and thus changes the calculation of performance indicators. Likewise, there are factors, i.e. seasonality, which could have influenced the television activity of an audience.

The quantitative research can potentially be continued to further analyse each campaign performance in itself and outline which campaigns performed especially well on a channel, market and yearly basis. Since all marketing actions were collected per campaign, a special look can additionally be taken into individual campaign outliers. To complement the data and gain a deeper understanding, it can be considered to conduct qualitative interviews with the marketing managers of each channel.

7. CONCLUSION
This research posed different questions to detect which marketing campaigns were most impactful on traditional linear television programming in the Nordics. The 30 campaigns that were executed in the time period between 2014 and early 2017 showed that the total performance of all campaigns was influenced by invested money and produced Gross Impressions. However, judging channel-specifically, marketing affected the television performance in different expansion levels and time spans. For each year, Channel 1 showed positive upward trends between Lead In times and premiere airings that seemed to have lasted temporarily. Channel 2 could indicate positive short-term impact levels for the campaigns in 2016, but not for 2015. For Channel 3, 2016 presented the best performance surge between Lead In time and new episode airings.

When comparing the slot specific campaigns in regard to their impact on the rest of channel programming, Channel 2 was the only channel that showed an upward trend in the other channel programming during the premieres, which was potentially induced by the targeted marketing efforts.

Conform to the ethical considerations of this research, the protection of sensitive data was made a priority; the publishing of the report was approved by all parties involved in accordance to prior agreements.
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Figures

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