

The power of TV advertising

The 5 pillars of TV's impact

JULY 2026

The
Global
TV Group



In a fragmented media landscape, TV remains the **fastest path to scale, trust, and growth**

Digital fragmentation has made efficient reach harder and more expensive.

To grow, brands still need:

- **Rapid national scale**
- **High-attention environments**
- **Trusted contexts that build brand and drive demand**

Across major international markets, Total TV continues to deliver on all three.

Investment in TV = Investment for growth

Unmatched **SCALE**

Superior **ATTENTION**

Proven business **RESULTS**

TRUSTED and **BRAND SAFE** environment

Continued **INNOVATION**

Unmatched SCALE

Across all major markets,
Total TV remains the only
channel capable of delivering
efficient national scale.

No other medium can build
mass, meaningful reach as
quickly or cost effectively.



Linear + BVOD reaches 88% of adults
weekly (IPA Touchpoints 2025)



TV (linear + streaming) delivers 74% of daily video viewing compared to 15% for social media video and 11% for YouTube (eMarketer)



TV reaches 74% of the population daily (Admtv, Précis de la télé, 2025)



TV reaches 81% of adults weekly (compared to 51% for YouTube) and accounts for 71% of all viewing (Numeris, Fall 2025)



TV reaches 92% of all adults monthly and 68% daily, doubling the number of social networks (Dos 30, October 2025)



TV reaches 81% of the nation weekly (Finnpanel, 2024)



Linear TV (Free + Pay TV) represents 79% of video consumption compared to 13% for YouTube (Kantar IBOPE Media, H1 2025)



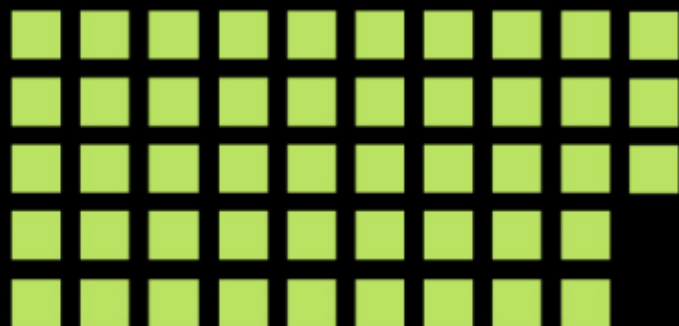
TV reaches 87.7% of Adults 15+ each month (TAM Ireland, Consolidated, All Commercial Channels 2025)

SCALE

Europe's top-of-mind destination on the TV set

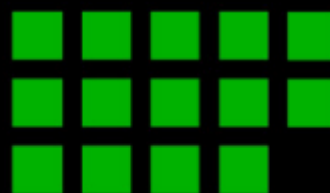


62% Total TV (+3pp)



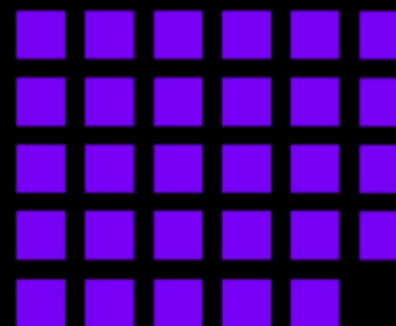
48% (-3pp)

Linear TV



14% (+6pp)

BVOD



29% (=)

SVOD

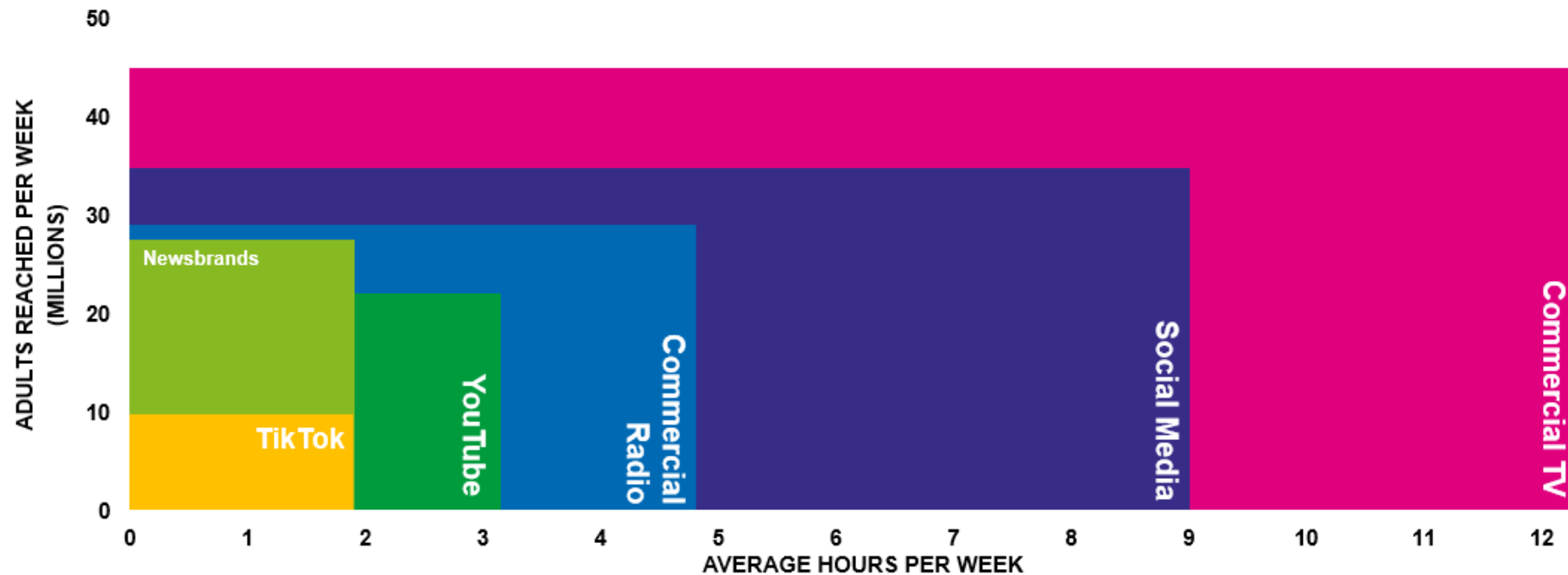


9% (-3pp)

AVOD
+ FAST
(YouTube, Pluto TV,
etc.)

SCALE

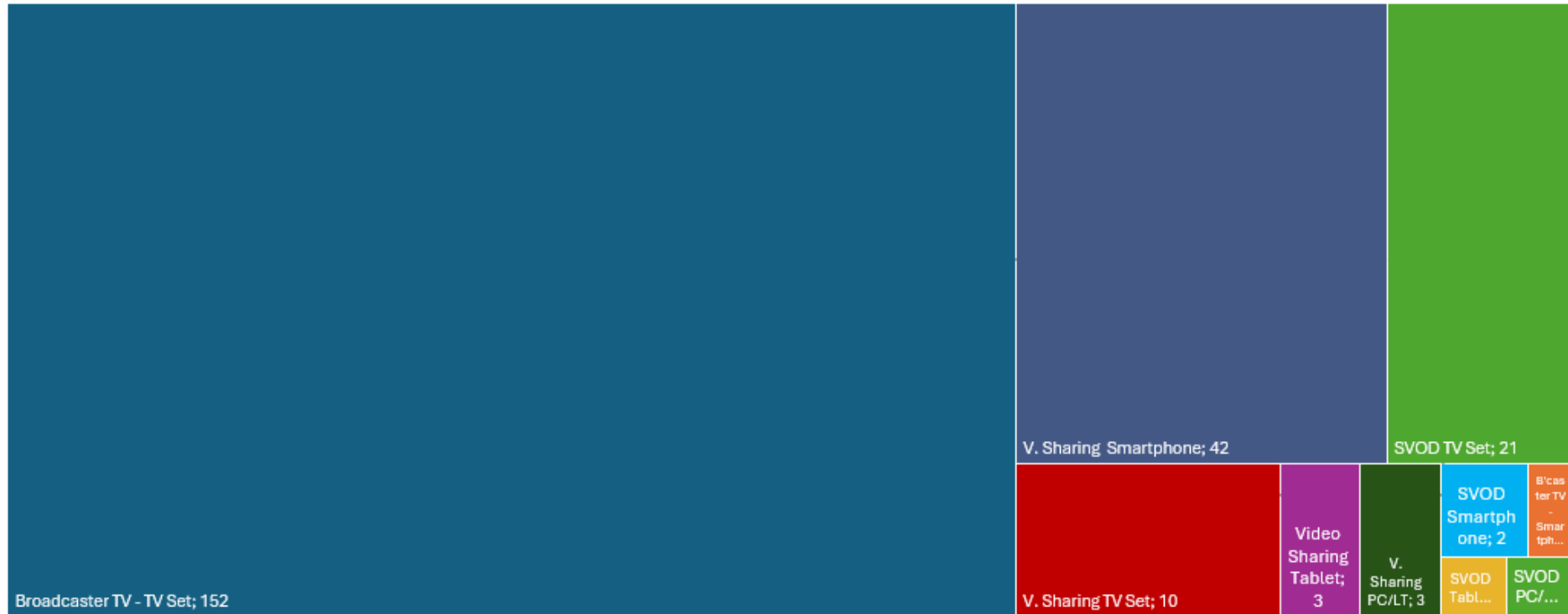
Commercial TV delivers scale



Source: IPA TouchPoints 2024 SuperHub (W2 2023 + W1 2024), Fieldwork Dates: 20th Sep 2023 – 3rd Dec 2023, 16th Jan 2024 – 12th Apr 2024) Base: adults 15+. Newspaper/magazine/TV figures include online/app consumption.

SCALE

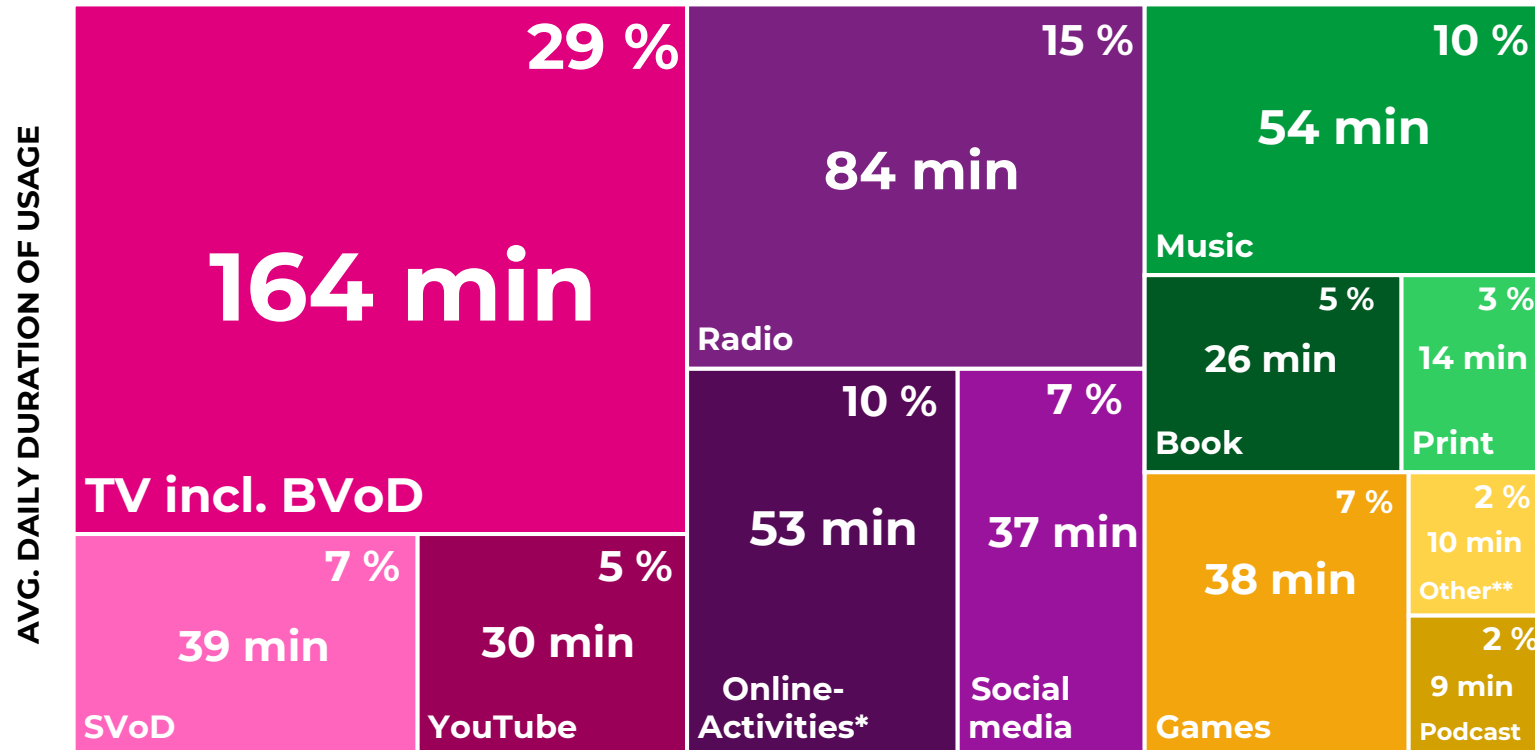
Broadcaster content delivers unmatched scale and reach



Source: TAM Ireland/Nielsen Total Video Panel, Consolidated 28 day - Adults 15+ - Avg. mins per person Jan-Dec 2025 (*does not include unidentified, other or unresolved streaming)

SCALE

TV REMAINS THE MEDIUM USED MOST BY FAR



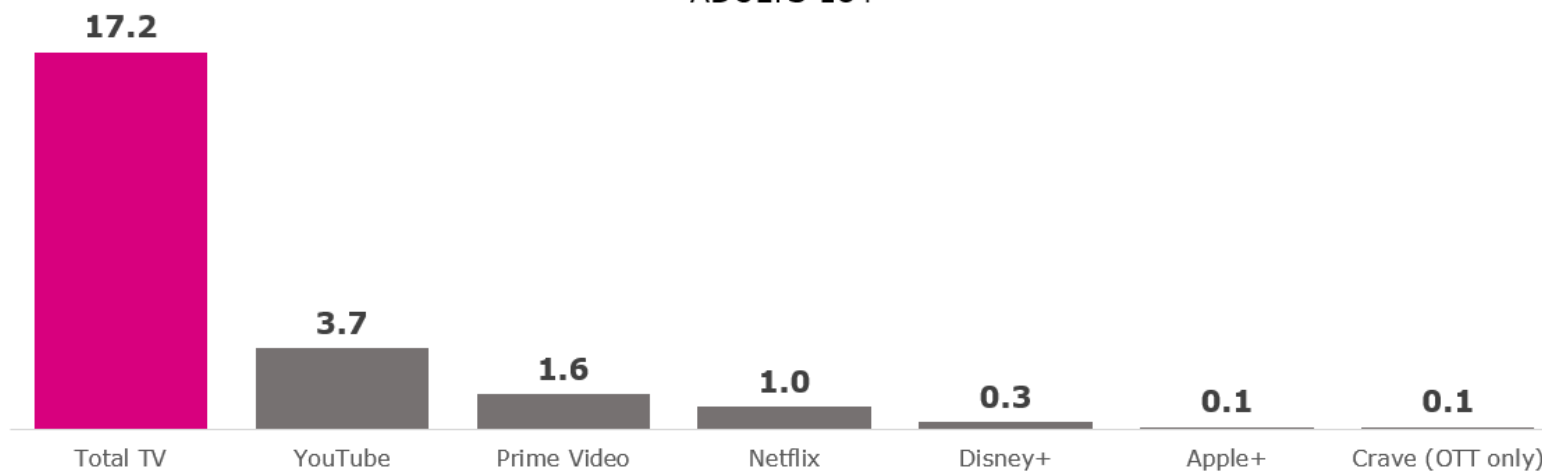
*Online activities: Online shopping, reading articles, blogs/forums, online navigation, eLearning, online banking; **Other: DVD/Blu-ray, audio books, cinema
 Basis: Adults ages 14- 69; n=2,453
 Seven.One Entertainment Group | Source: Media Activity Guide 2025, forsa

SCALE

Total TV dominates time spent



AVERAGE WEEKLY HOURS ADULTS 18+



Source: Numeris VAM 09/15/25 to 12/21/2025 | Total Canada | Adults 18+ | all time spent per capita
Total TV defined as linear TV and broadcaster streaming services | Streaming Services are ad-free and ad-supported services (in-home viewing only)

think^{tv}

proven RESULTS

TV is a primary driver of both short-term sales and long-term profit.

TV doesn't just build brands – it drives measurable financial performance.



TV is the greatest driver of profit volume, delivering **55%** of all profit for 44% of spend (Profit Ability 2, 2025)



TV delivers among the highest short-term profit ROIs - beating OLV and social media - and is the **largest profit driver** (Miix Analytics 2025)



No other medium drives additional revenue as effectively as TV (Seven.One Media, Facit Research)



TV delivers the best ROI / Contribution ratio, with a total ROI of **€6.1** (#ROITV6 : TV/STREAMING, IMMEDIATE EFFECTS & LASTING RESULTS)



TV advertising brings a four-time return on investment in the short term, while long-term returns **exceed €13** (Acceleration Nordic, 2022-2024)



Advertisers rank linear TV #1 for ROI, ahead of search and online video (AEA / SCOPEN, 2024)

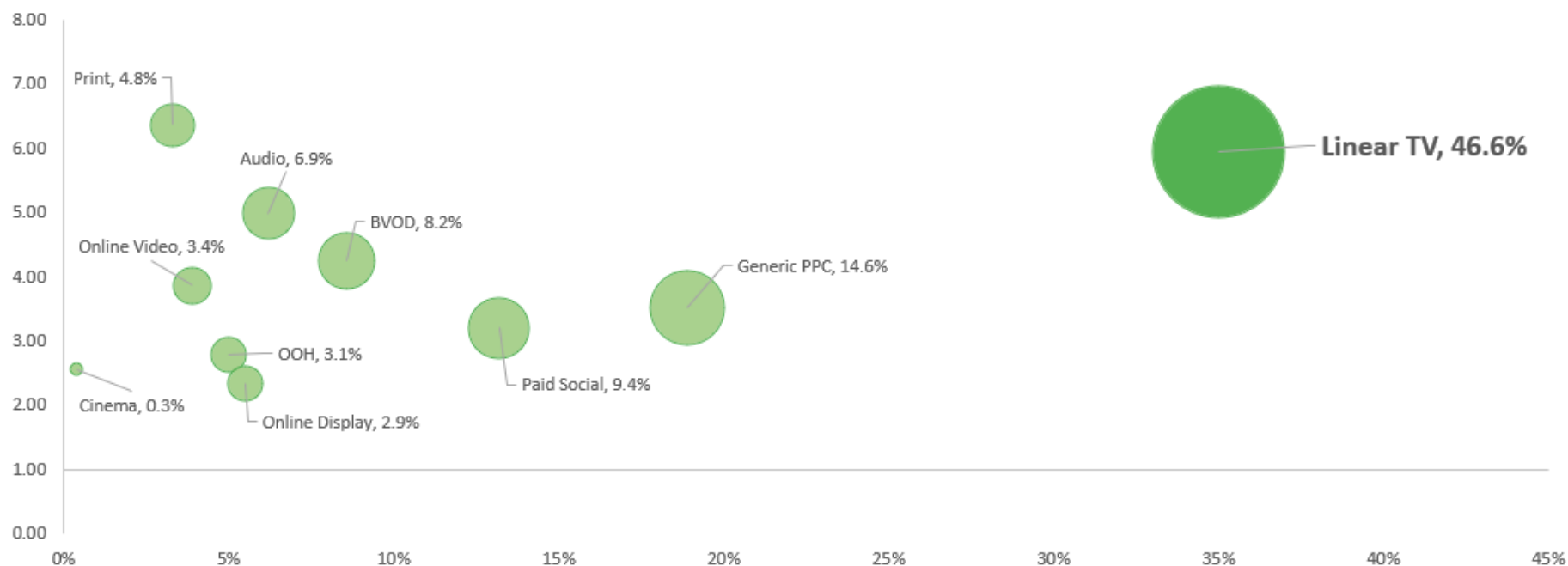


Over the past decade, **data-driven DTC brands have increased TV investment 6x** (VAB analysis of Nielsen AdIntel as of 2021-2025)

RESULTS

TV is the greatest driver of profit volume

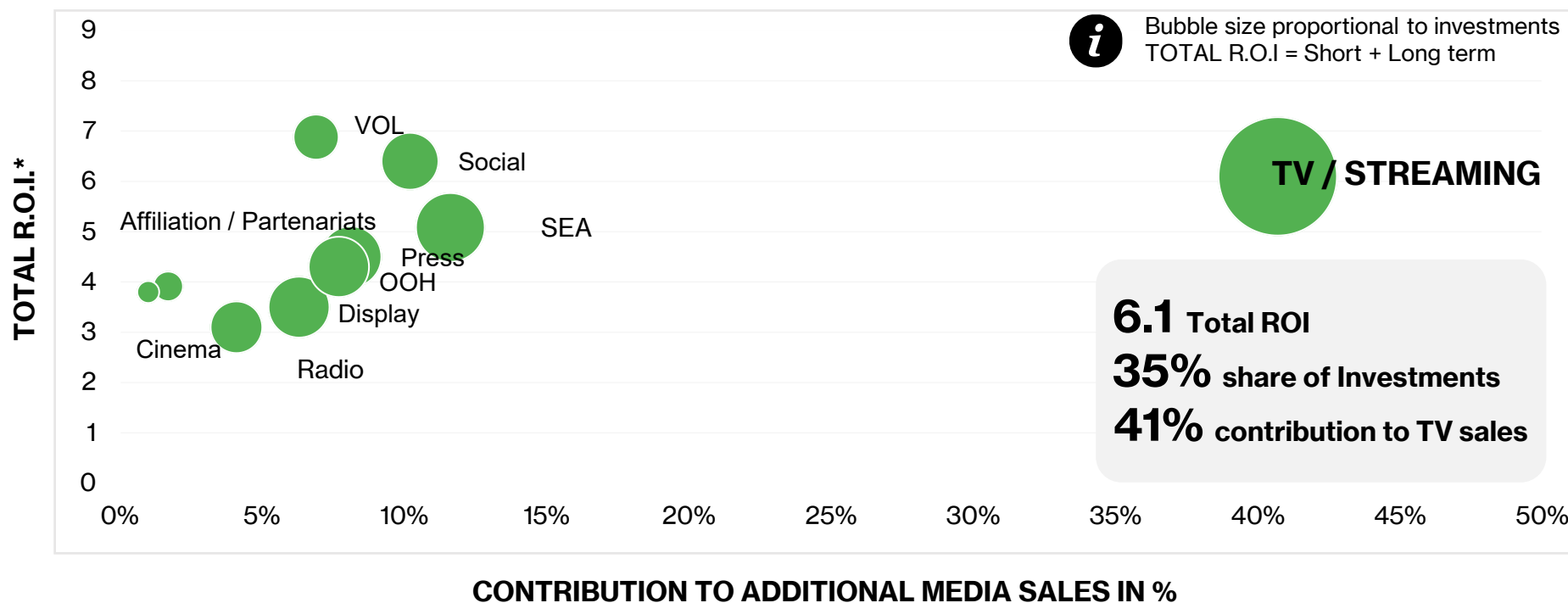
delivering 47% of all profit for only 35% of spend



Source: Profit Ability 2, April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.
Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK

RESULTS

TV / Streaming delivers the BEST ROI/CONTRIBUTION RATIO



Cross-sector: Finance, Healthcare, Media, Retail, Automotive, FMCG, Technology, Mobility, Hospitality & Leisure, Cosmetics & Beauty, Luxury Goods

#ROITV6 : TV/STREAMING, IMMEDIATE EFFECTS & LASTING RESULTS | NOVEMBER 2025

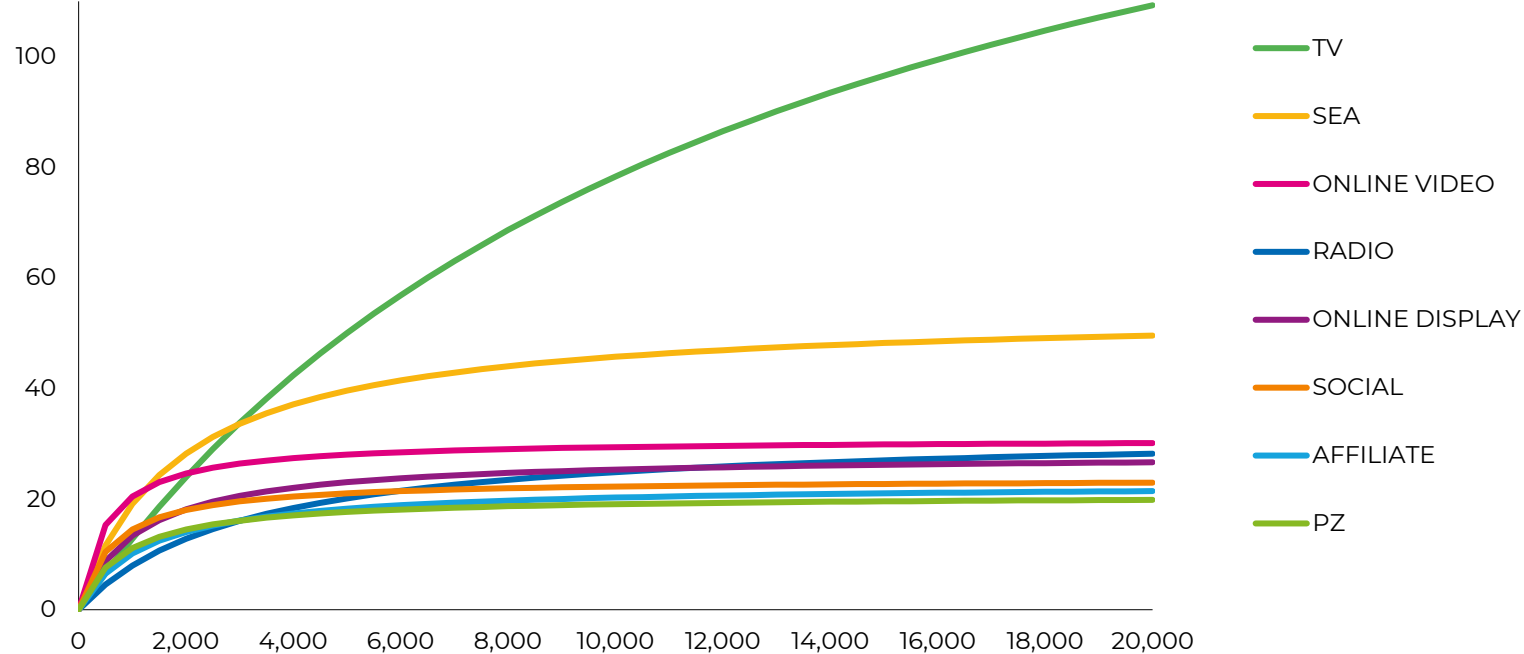
RESULTS

NO OTHER MEDIUM DRIVES ADDITIONAL REVENUE AS EFFECTIVELY AS TV



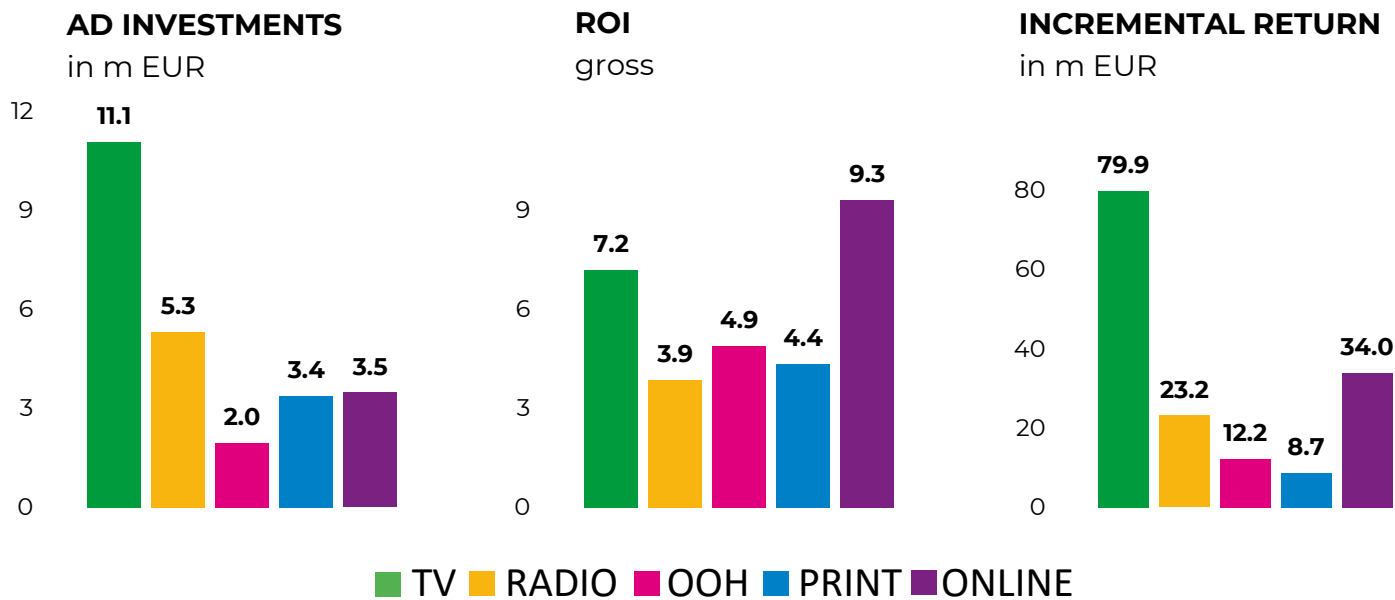
INCREMENTAL RETURN AND ADVERTISING INVESTMENTS

Return in m EUR and net advertising investments in 000 EUR



RESULTS

TV GENERATES BY FAR THE HIGHEST PROFIT



% MEDIA CONTRIBUTION*



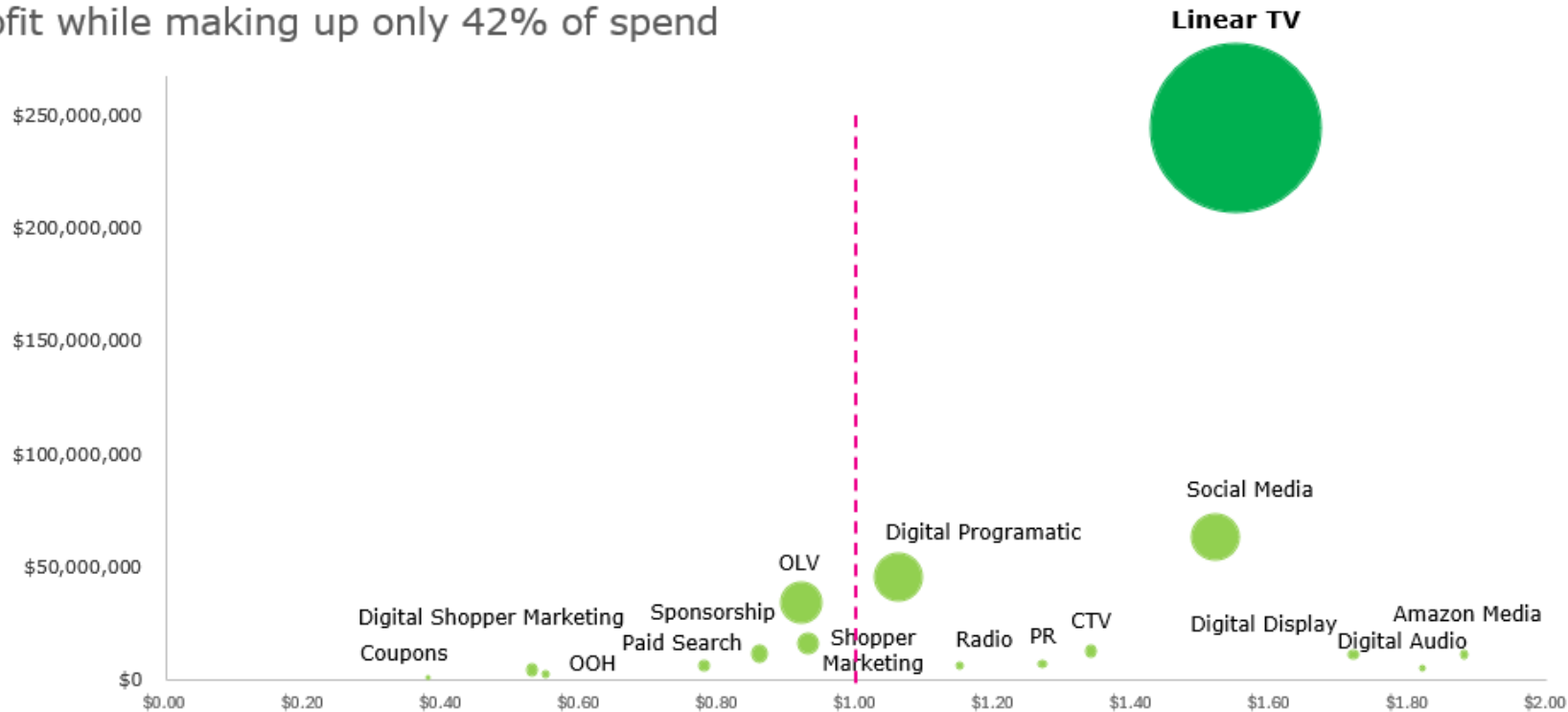
NON-FMCG

Basis: 228 models from 2000 to 2023; *percentage distribution of advertising-induced incremental returns
Source: bynd / SevenOne Media

RESULTS

TV is the largest profit driver

TV delivers 50% of measured short-term profit while making up only 42% of spend



Source: Miiix Analytics analysis, September 2025 | \$45b in revenue and \$621m in media spend analyzed, Canadian data

RESULTS – multiplier effect

TV's halo effect makes the other media work harder.

In addition, TV increases:

- Search activity
- Website traffic
- Conversion efficiency and long-term profit.



TV has a significant halo effect, increasing the sales ROI of digital media by **19%** (Accenture, 2020)



TV is the biggest single source of website traffic (Magic Numbers, 2021)



Digital channel performance uplifted **13.7%** when TV is on air ((hy the Eff would you cut TV? GroupM, 2025)



If a brand cuts television, it may not just lose TV's own direct contribution. It may also weaken the productivity of paid search that television had been quietly supporting in the background. (Colourtext, 2025)



Last click attribution overestimates the impact of paid search by **190%** (and underestimates TV by **90%**) (WARC The Multiplier Effect, WARC, 2025)

RESULTS – multiplier effect

TV improves digital's performance

TV has a significant halo effect on digital media, increasing its sales ROI by 19%



Standalone Digital ROI

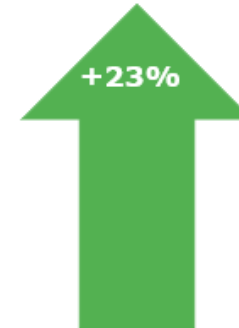


-19%

without TV's halo effect, digital advertising's average ROI would decline by 19%



TV's Adjusted ROI



+23%

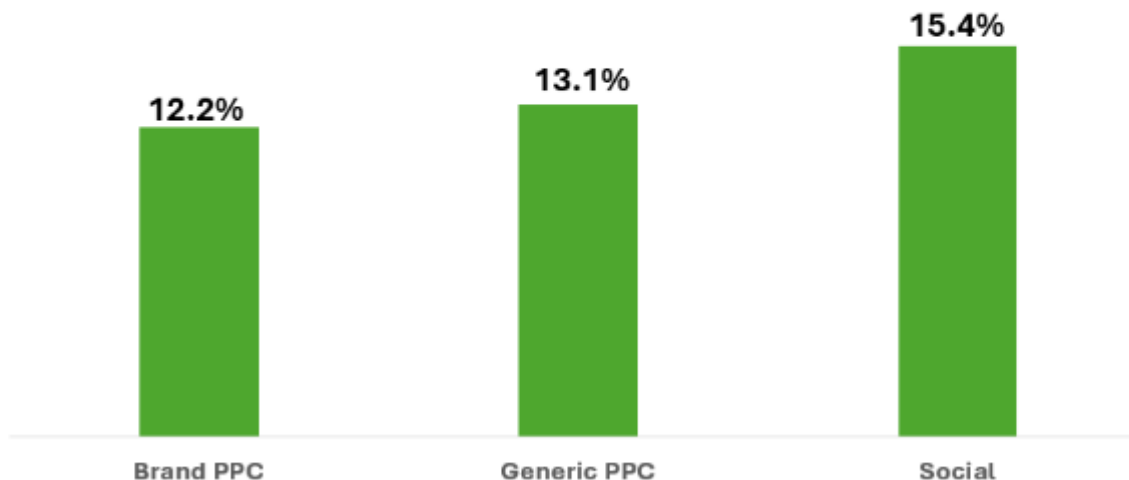
Source: Accenture [Canadian Media Attribution Study](#)

RESULTS – multiplier effect

When TV is on air, digital channel performance is **uplifted by 13.7%**



Average uplift in tracked performance when significant weights of TV on air



Source: Why the Eff would you cut TV? GroupM, 2025



TV's multiplier effect

TV boosts the effects of other channels by up to

54%

RESULTS – multiplier effect

TV's structural boost to PPC



Brand 11 (Online): What happens to the number of **web visits**
PPC can convert **one year** after TV is cut

51%

Paid search converted around
51% more web visits when TV ads
were running

33%

If TV is cut to zero, PPC's
conversion rate would fall by
33% after 1 year

TV spend reduction	Year 1 fall in PPC conversion rate
10% budget cut	-3.3%
20% budget cut	-6.6%
40% budget cut	-13.2%
100% budget withdrawal	-33.1%

superior ATTENTION

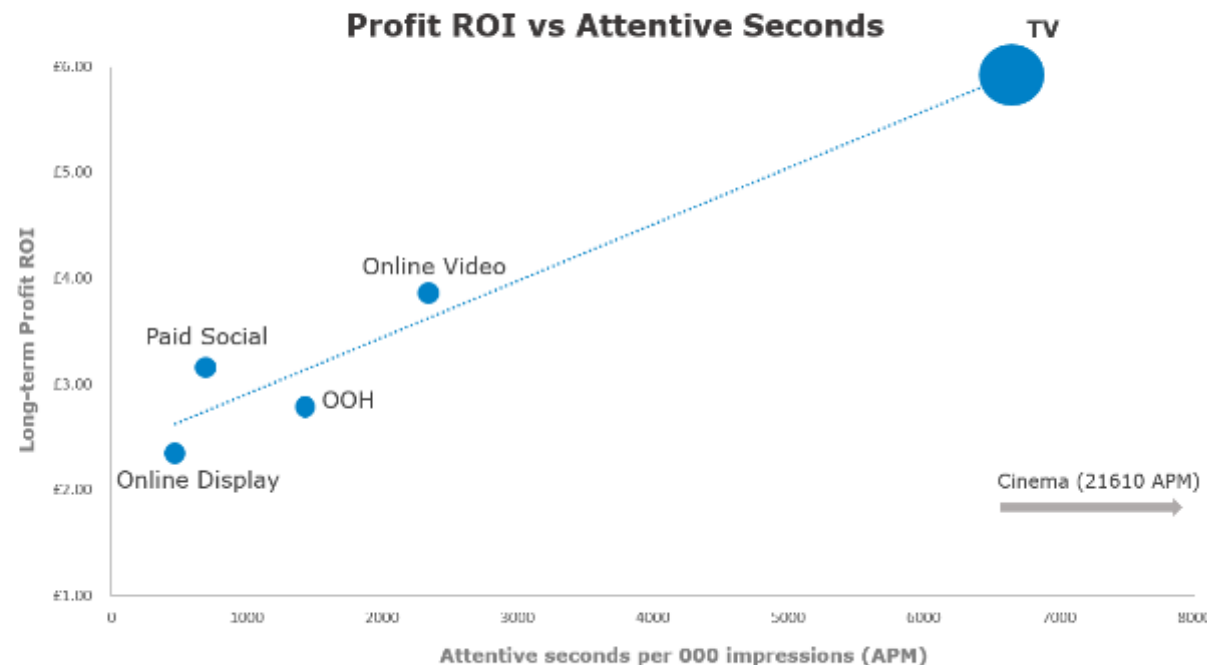
There is a clear relationship between attention and outcomes: Attention translates into stronger brand equity and more effective advertising.

TV delivers meaningful attention that drives growth.

ATTENTION

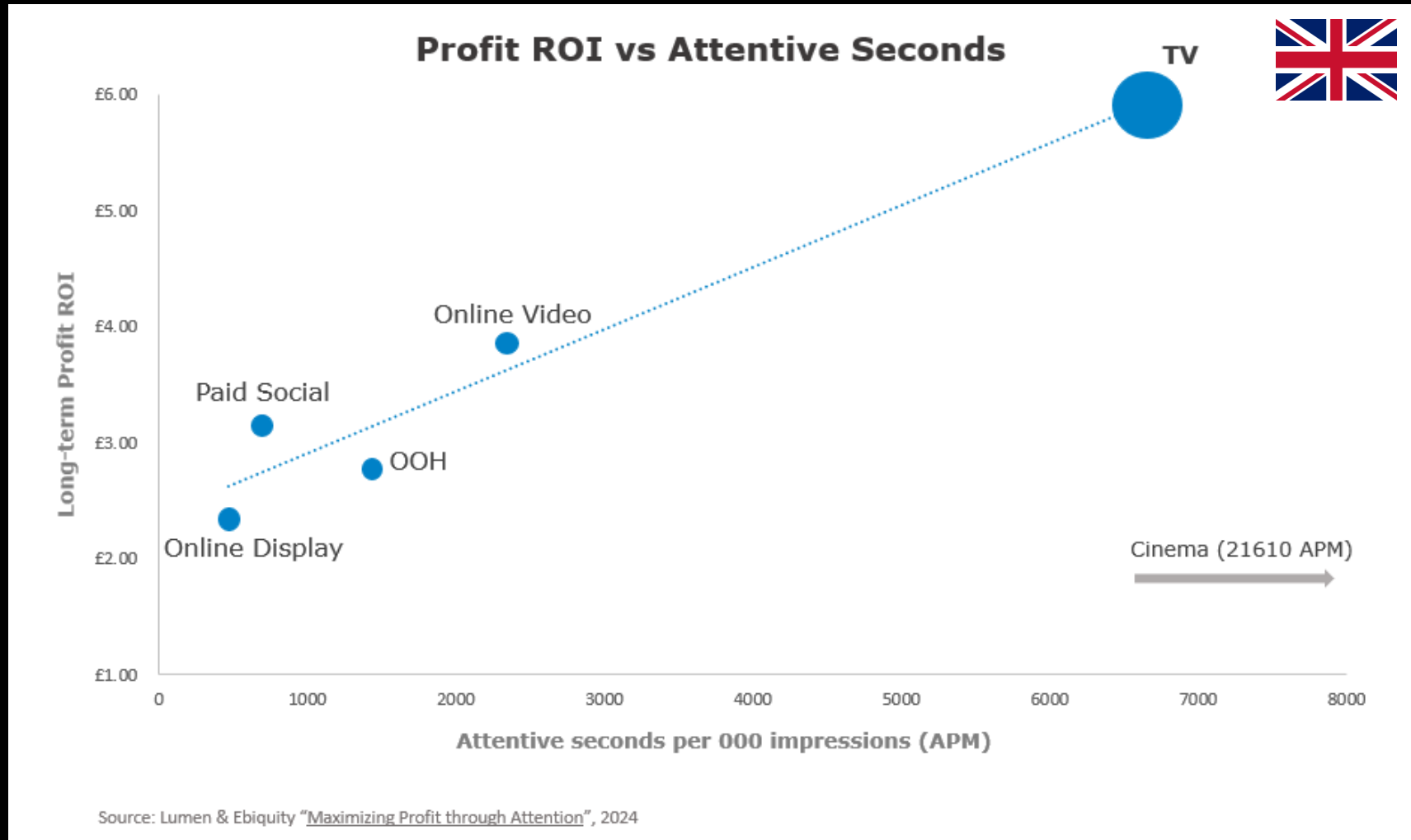
TV delivers superior attention

There is a strong correlation between attentive seconds and incremental profit across media channels, with TV delivering a far superior attentive seconds per impressions than online video or paid social advertising



Source: Lumen & Ebiqity "Maximizing Profit through Attention", 2024

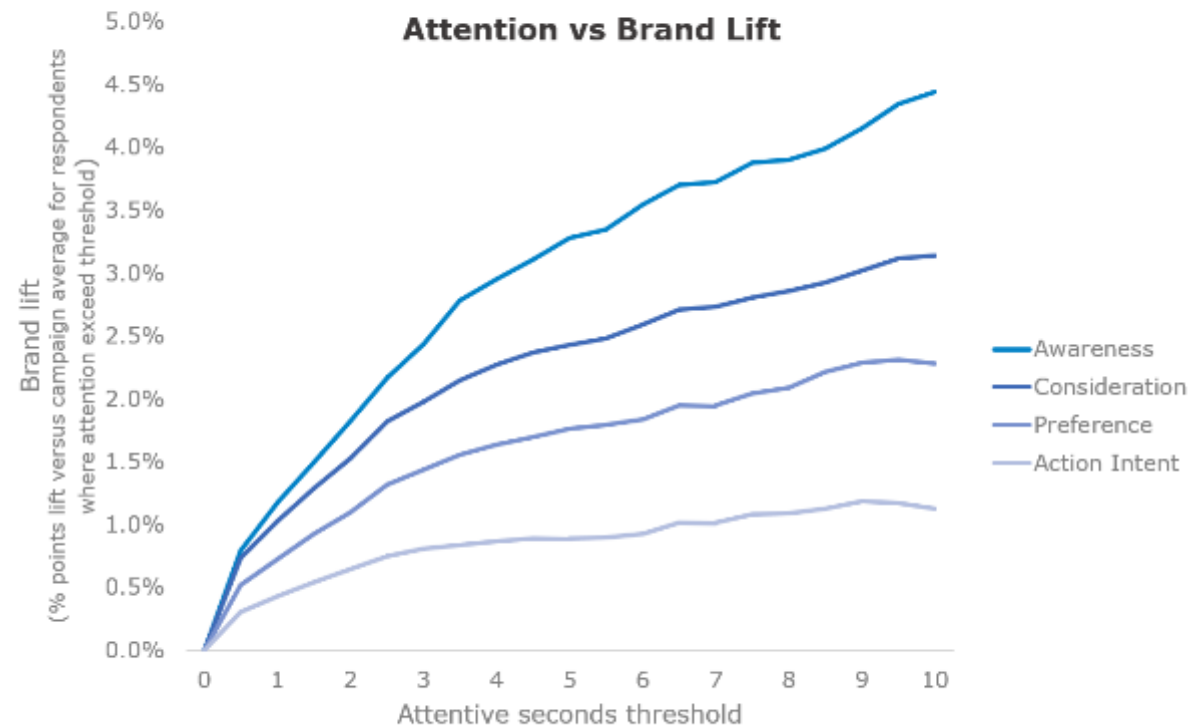
ATTENTION



ATTENTION

attention drives **impact**

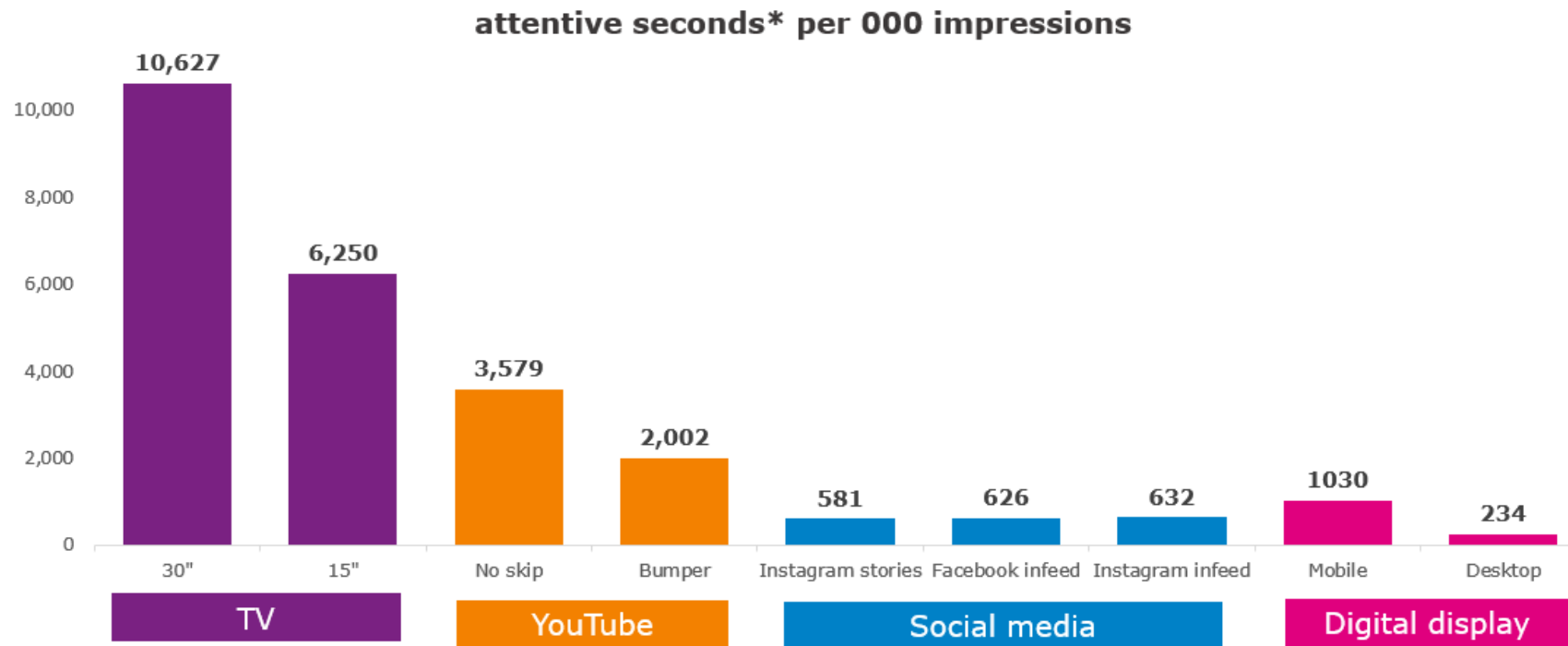
there is a clear relationship between attention and brand outcomes: the longer an audience pays attention to an ad, the greater the increase in brand awareness, consideration, preference and action intent



Source: Havas, Brand Metrics & Lumen "What do 9,000 Brand Lift Studies Teach Us About Attention & Memory" 2024

ATTENTION

TV ads deliver the most attentive seconds

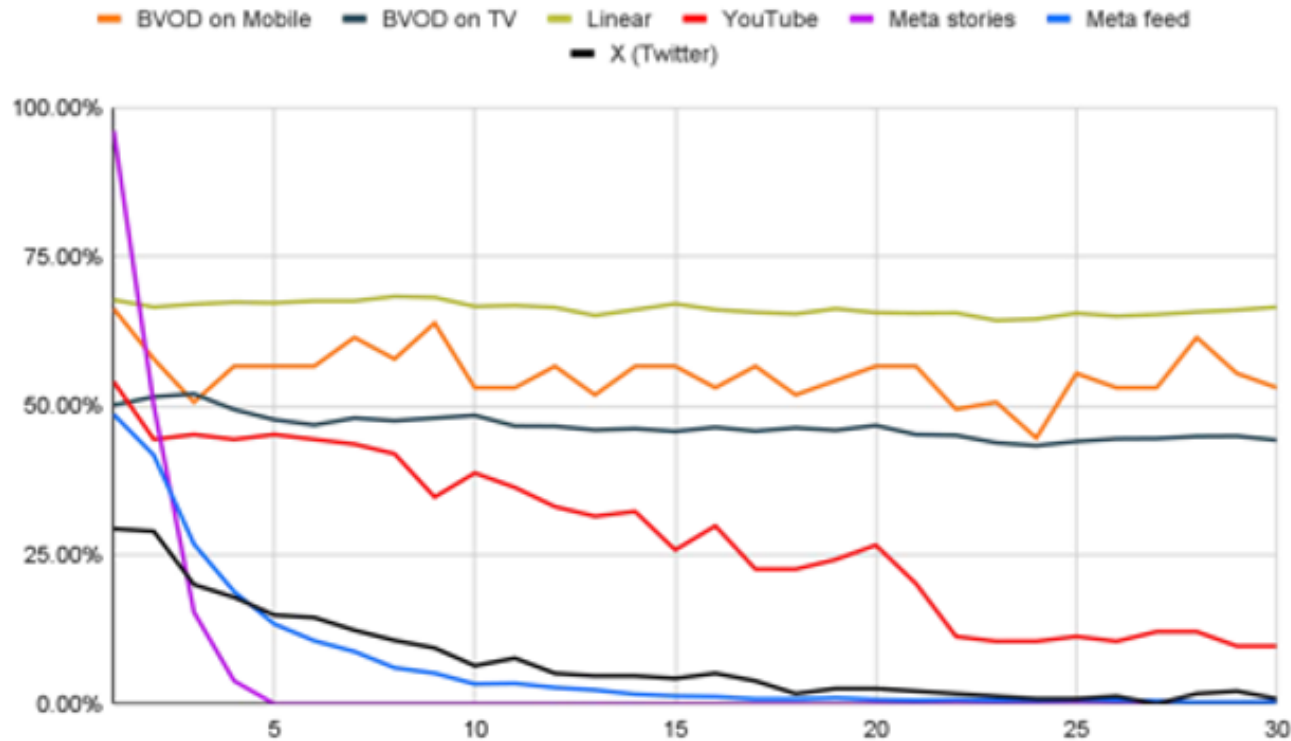


Source: Ebiquity, with Lumen, TVision and Dan White – The Challenge of Attention, 2024

* attentive seconds = the actual time an ad is viewed by a person

ATTENTION

TV platforms **maintain strong attention** levels while social media platforms see rapid declines



Source: Amplified Intelligence/RedC Ireland AV Attention Study

ATTENTION

TV & BVOD deliver far more attention

(Instagram & TikTok get just two seconds)



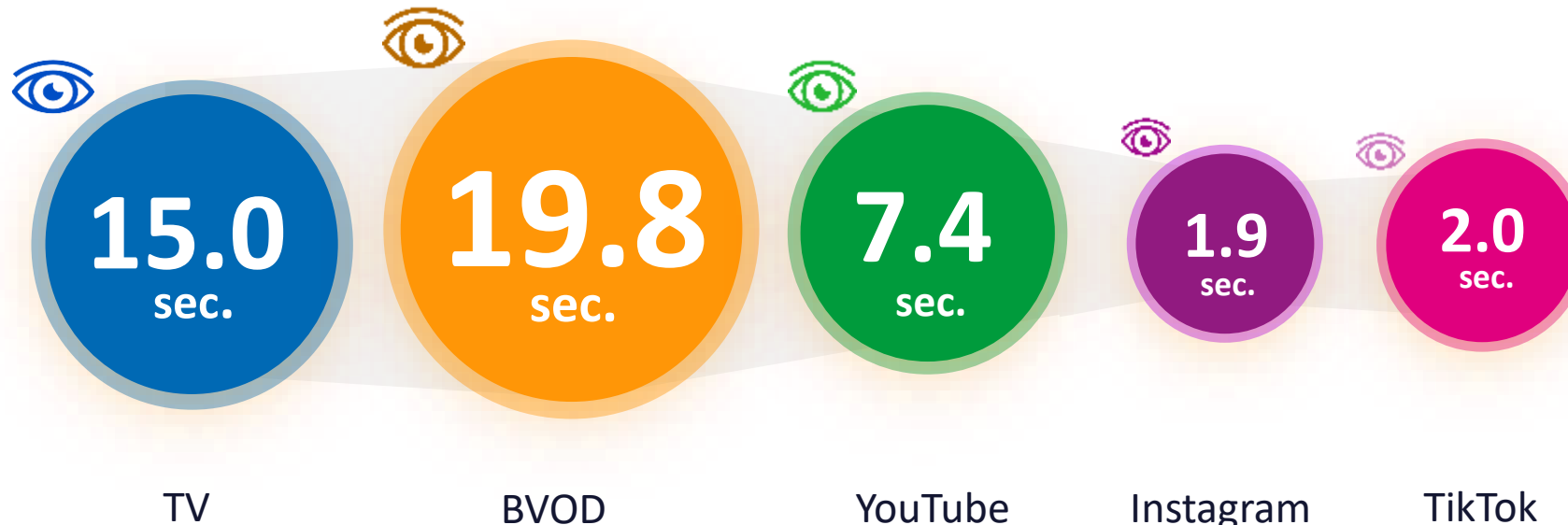
Play Duration 19.8s

22.9s

9.7s

2.4s

2.3s



Eyes on Ad: Viewing time (median) of all video advertising contacts per platform in seconds

Source: eye square on behalf of Screenforce 2024

N(TV)=1.164, N(BVOD)=676, N(YouTube; Big Screen und Mobile)=530, N(Instagram)=625, N(TikTok)=491. N=Number of Ad Contacts.

TRUST

TV delivers the quality, trusted contexts that build brands and drive demand, translating into stronger brand equity and more effective advertising.



Twice as many people trust brands advertised on TV than YouTube (Tapestry Research, 2025)



Adults are **4x** more likely to trust TV than social media (MRI-Simmons)



Broadcast media are the **most trusted** in the majority of EU countries (Trust in Media, EBU, 2024)



60% of consumers identify TV as the most trusted medium (YouGov 2024)



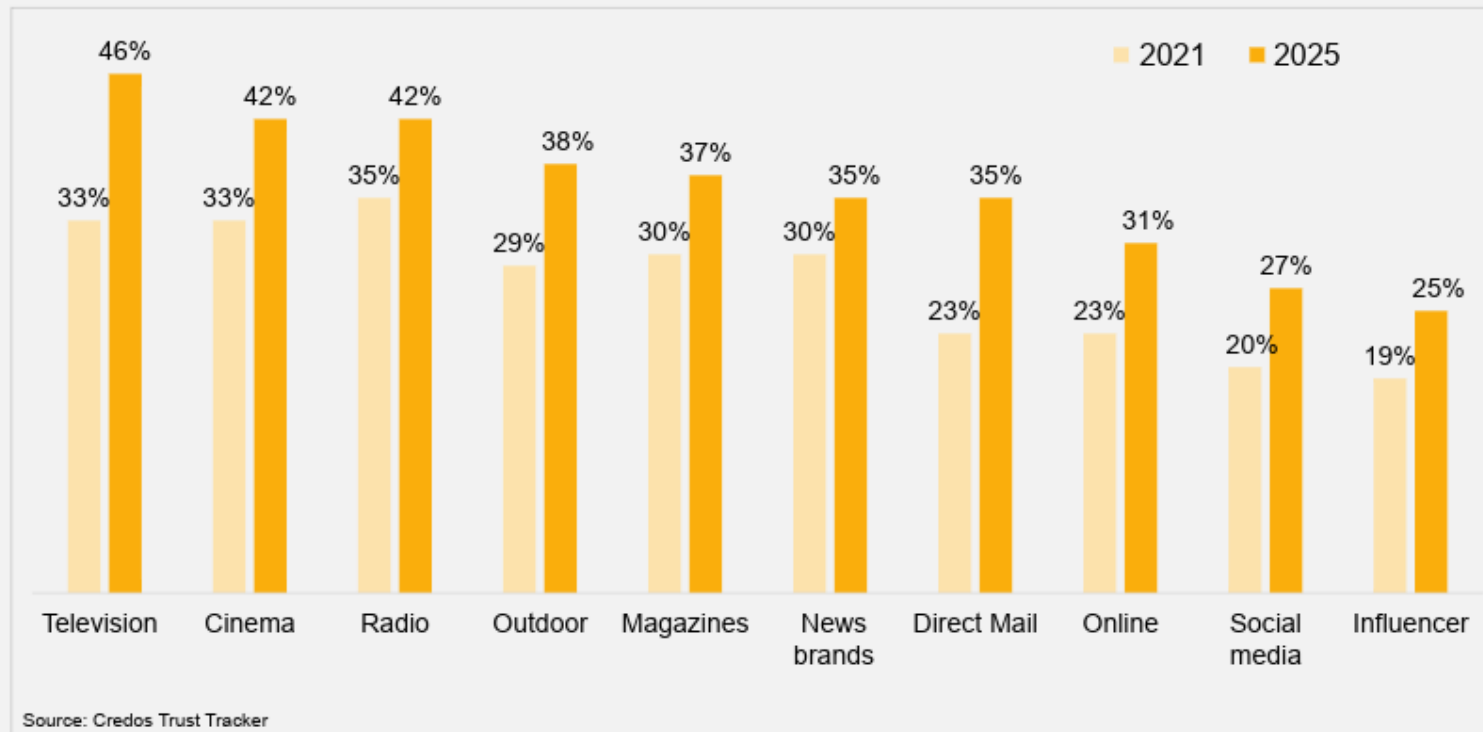
Trust increases **44%** when watching in professionally produced content vs. non-professional content (Context Effects, Map The Territory & Tapestry Research, 2024)



Trust in TV news is **2.4x higher** than trust in social media and **3.6x higher** than trust in influencers (least trusted) (Baromètre de la confiance des Français dans les médias 2026 - La Croix - Verian - La Poste)

TRUST

TV is the most trusted medium





Adults are
4 x more likely to
trust TV
than social media

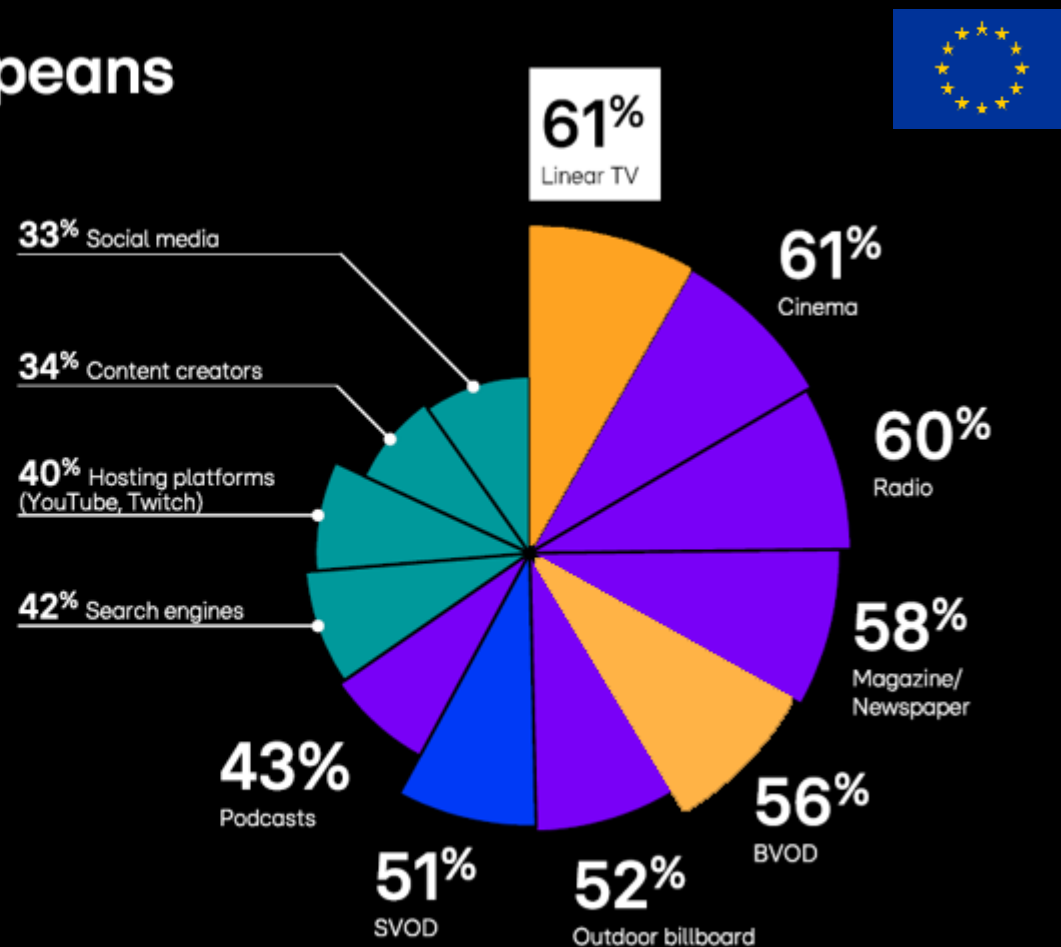
(USA, MRI-Simmons)

TRUST

The media in which Europeans place their trust

« I can trust a brand that I discover for the first time through an ad on the following media.

(Any agree, Europe)



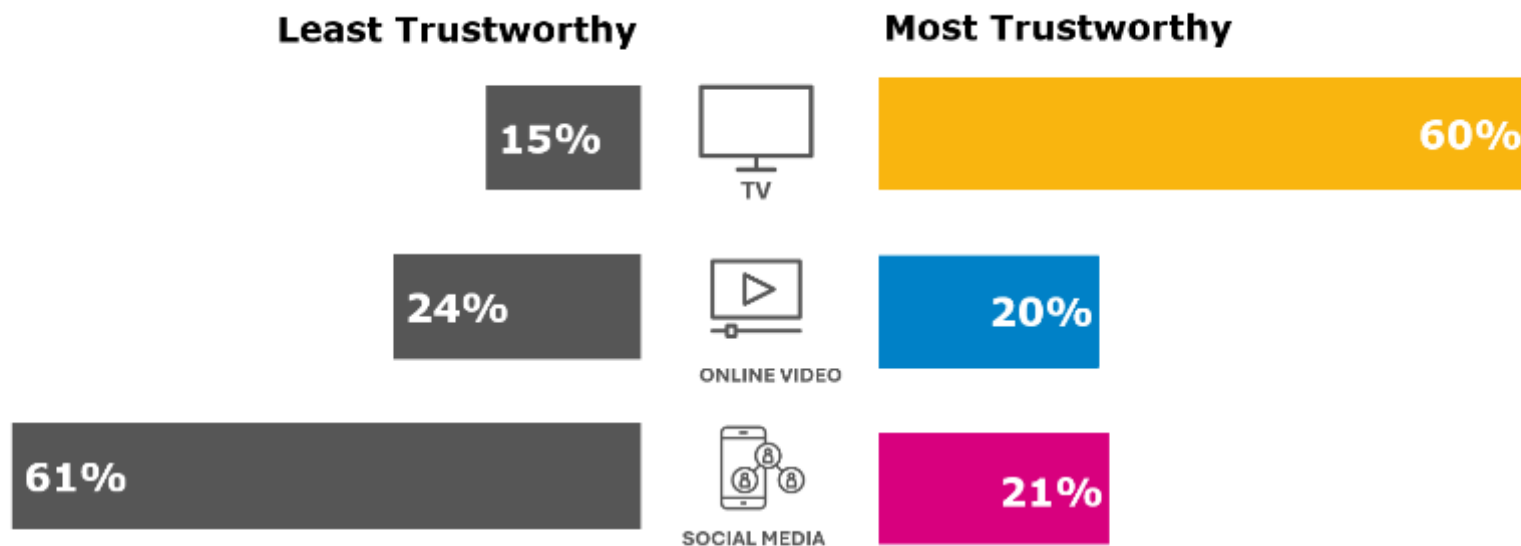


60% of consumers
identify **TV** as
the most **trusted** medium.

(Canada, YouGov survey, A18+ July 2024)

TRUST

TV is the **most trustworthy** medium, social is the least



Which one of the following media carries video advertising that you believe to be most trustworthy? least trustworthy?

Source: YouGov survey, Total Canada, A18+, July 2024



Trust increases

44%

when watching

professionally produced content

vs non-professional content

(Context Effects, Map The Territory & Tapestry Research, 2024)



TRUST in TV news is

- **2.4 x** higher than trust in social media
- **3.6 x** higher than trust in influencers
(who are the least trusted)

69% of French people
trust TV new programs

INNNOVATION

Today's TV combines mass reach with data, targeting and accountability.

Advanced capabilities:

- **Audience targeting**
- **Outcome measurement**
- **Shoppable formats**
- **AI optimization**



Investment in programmatic connected TV up +46% in two years



Online-born business sector now the largest investor in TV (Nielsen Ad Intel, 2024)



Spain launched CTV + Iwall — a tool that integrates Publiespaña's OOH and connected-TV inventory, boosting investment in these media



Growth in digital TV advertising +16.1% YOY



Brazil is embracing TV 3.0 (DTV+), leveraging new technology for 8K/4K, interactivity, targeted ads, and shoppable units, backed by government support and local content investment.

TV is a full-funnel, data-driven platform that combines scale with precision.

INNOVATION

New ad formats, shoppable products and interactive experiences

COVER+

Offrez-vous une parenthèse sauvage

Escapade

+25 pts
in aided awareness

CARROUSEL RETAIL ADS

MAYBELLINE

SCROLL TO FIND YOUR SHADE MATCH

LIGHT AS AIR. UP TO 30HR WEAR.

QUIZZ SHOW

PLAY FRIENDS TRIVIA

In Season 3, what was the name of the product Joey advertised in an infomercial?

Spring-De-Hall

SOUL SHAMPOO

WOW FALCON

The Millionaire 2006

SCORE: 1/4 | LIVES: 0

Habillage content

SORA

+33 pts
in purchase intent

AD PAUSE

Miam Livraison

ON COURSE, VOUS DÉGUSTEZ.

TF1PUB

7

Source: Cover+ x Toluna study, Gains between those who recognized the format and those who didn't | Toluna, Ad pause effectiveness, Gains between those who recognized the campaign and those who didn't

INNOVATION

Contextual advertising
driven by AI recognition



CONTEXTUAL ADS

Pause ads, shoppable
ads & commerce
integration



PAUSE TO SHOP

AI clip production
for smaller clients



OWN THE MOMENT



INNOVATION

Social media content aired on TV, making CTV advertising accessible for smaller brands



Seamless integration on TV Screen & streaming platforms



INNOVATION

AI integrated into booking and planning tools

AI

AI-generated recommendations based on business data, campaign performance analysis and inventory.

PRECISION

Customer recommendations tailored to their budget, targeting, format and communication period.

TRANSPARENCY

Full access to all campaign information and indicators (cross-media reach, contacts, CPM, attentive reach, carbon footprint).



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