

# 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)



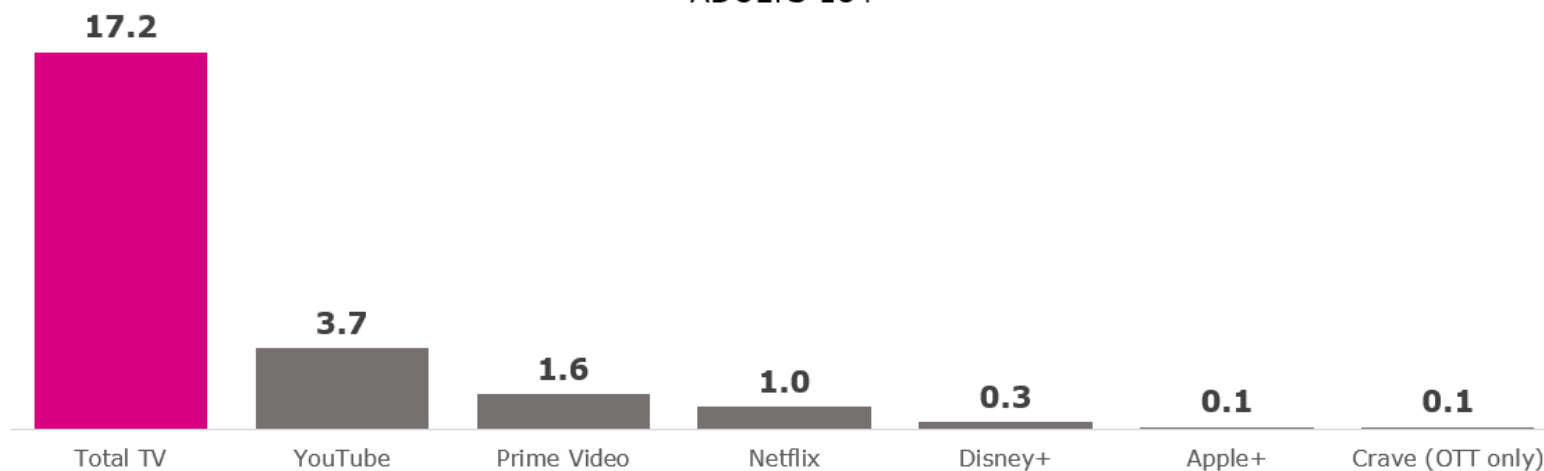
Linear TV commands **76%** of all video viewing,  
compared to 14% for YouTube and 10% for  
Streaming Platforms (Kantar IBOPE Media, H1 2025)

# 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)

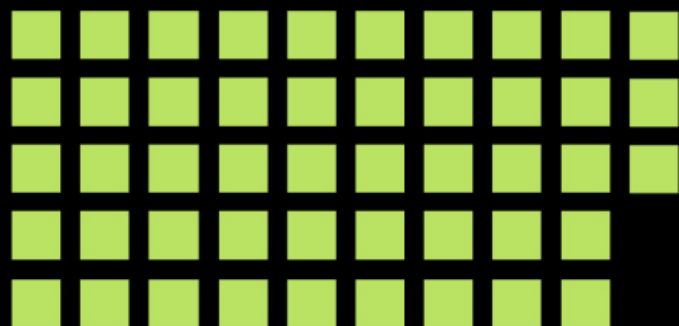
think<sup>tv</sup>

# SCALE

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

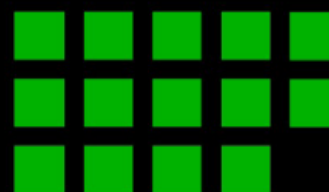


**62%** Total TV (+3pp)



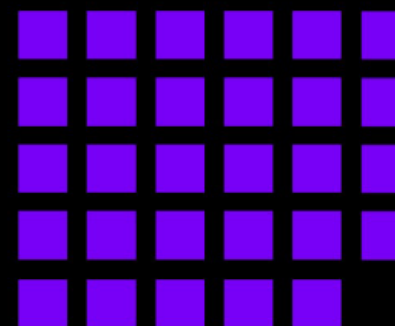
**48%** (-3pp)

Linear TV



**14%** (+6pp)

BVOD



**29%** (=)

SVOD

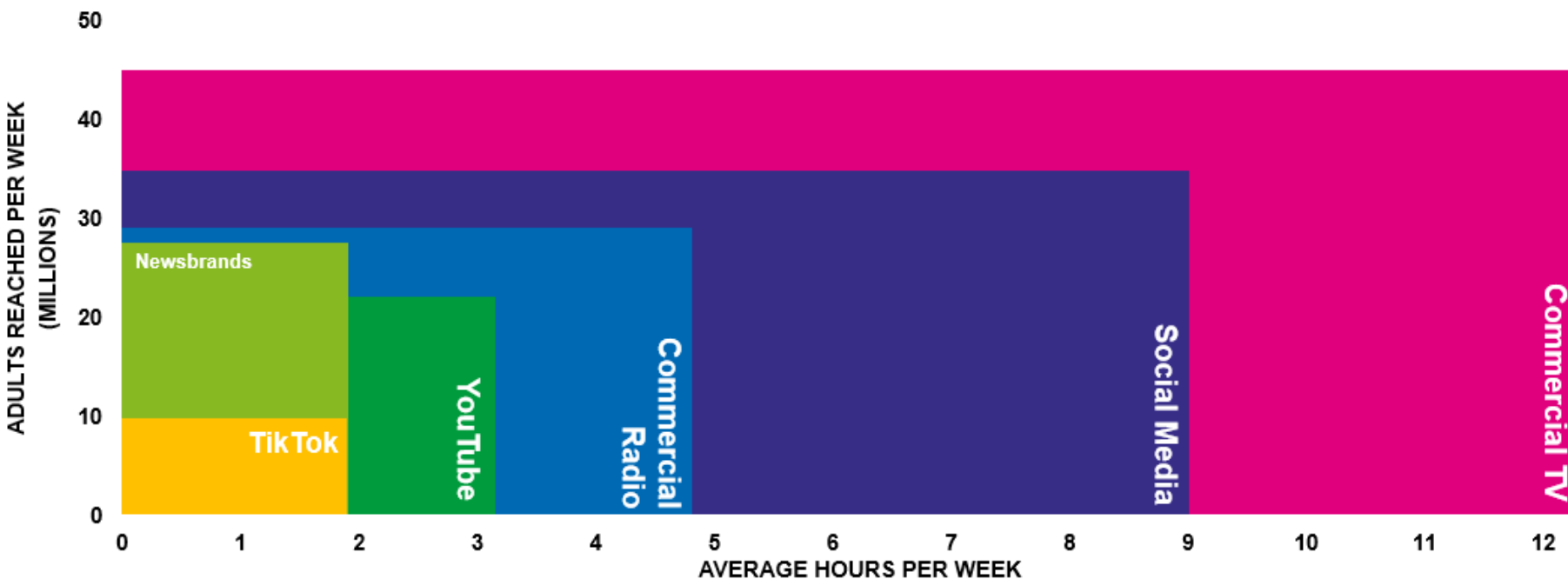


**9%** (-3pp)

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

# SCALE

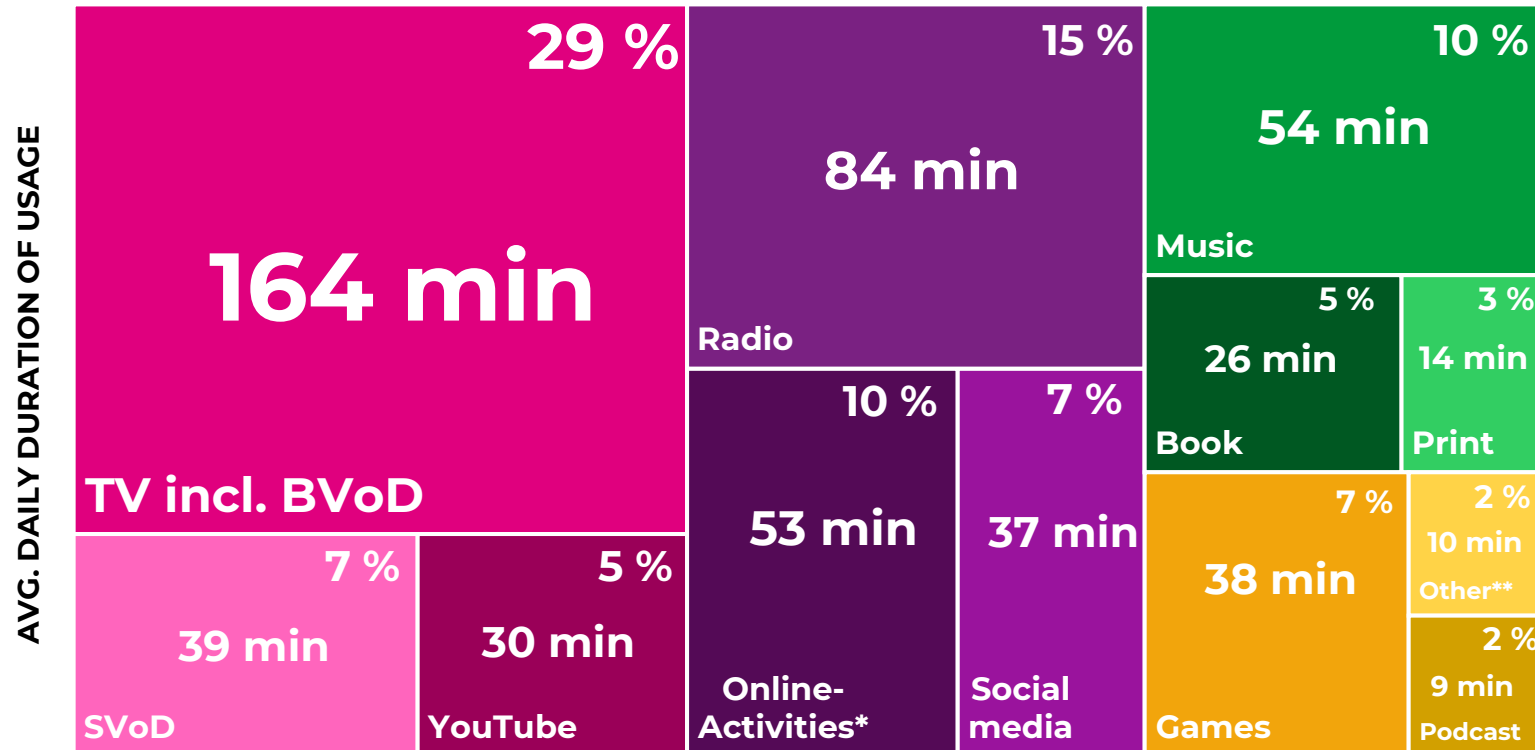
## Commercial TV delivers scale



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

# 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



# 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)

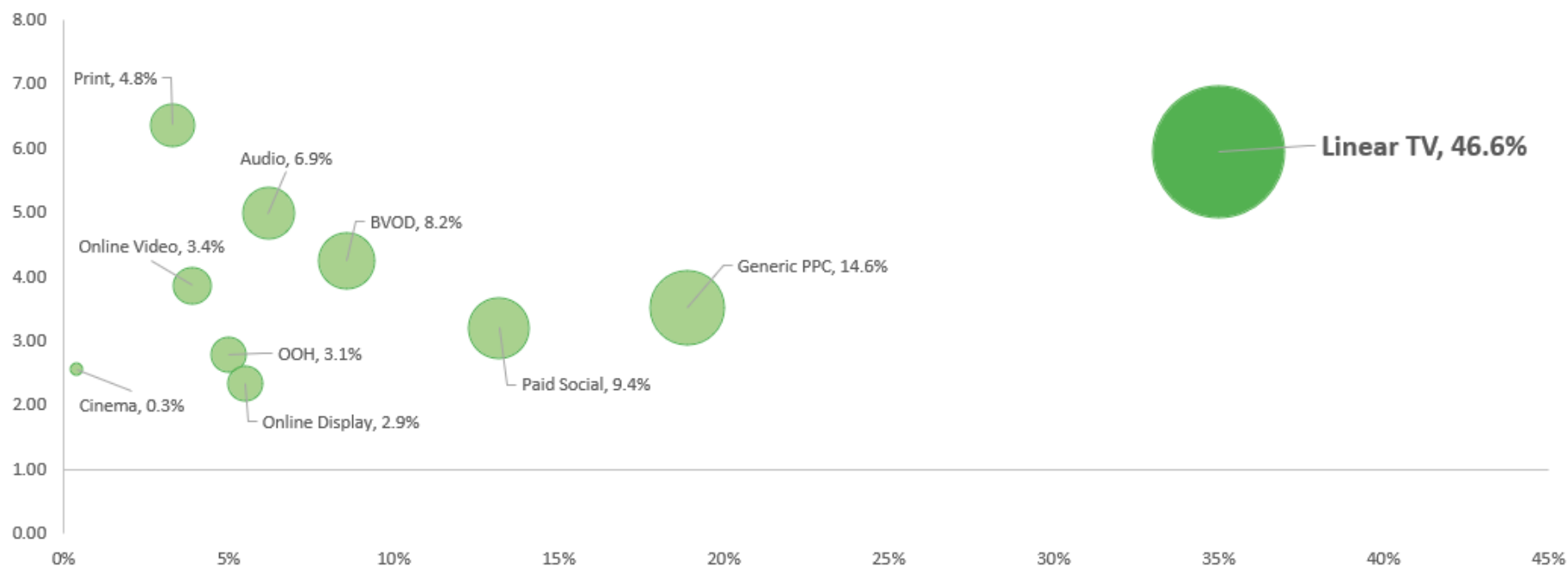


Over the past decade, **data-driven DTC brands have increased TV investment 6x** (VAB analysis of Nielsen AdIntel as of 2021-2025)

# RESULTS

## TV is the greatest driver of profit volume

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

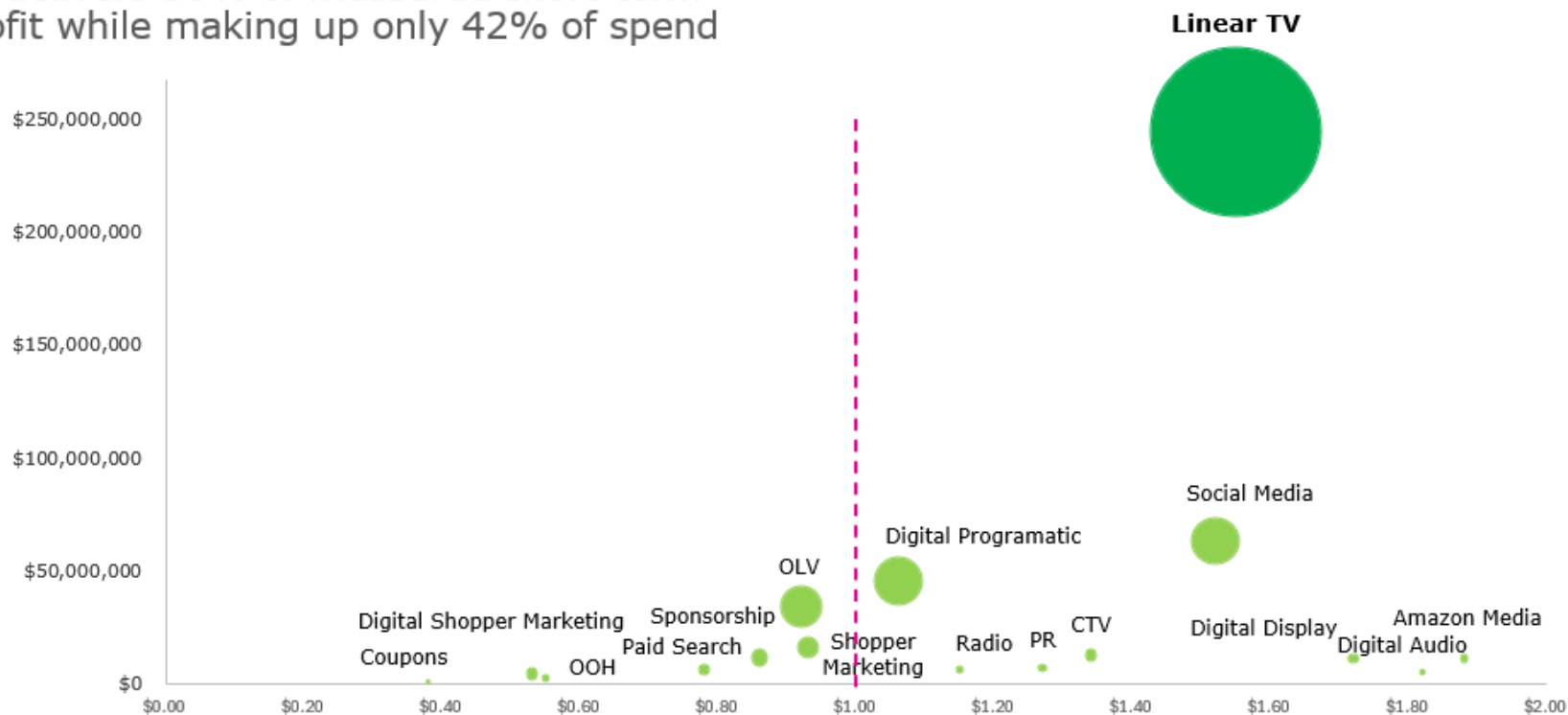


Source: Profit Ability 2, April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.  
Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK

# RESULTS

## TV is the largest profit driver

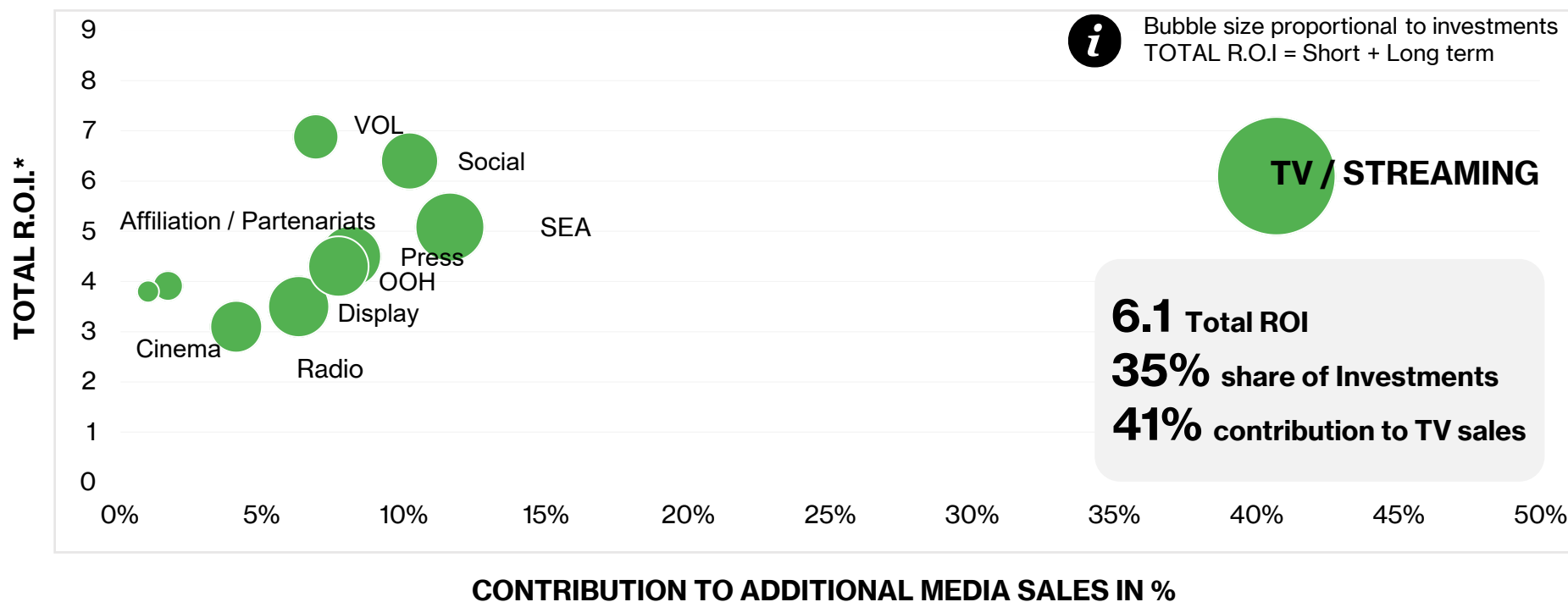
TV delivers 50% of measured short-term profit while making up only 42% of spend



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

# RESULTS

## 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

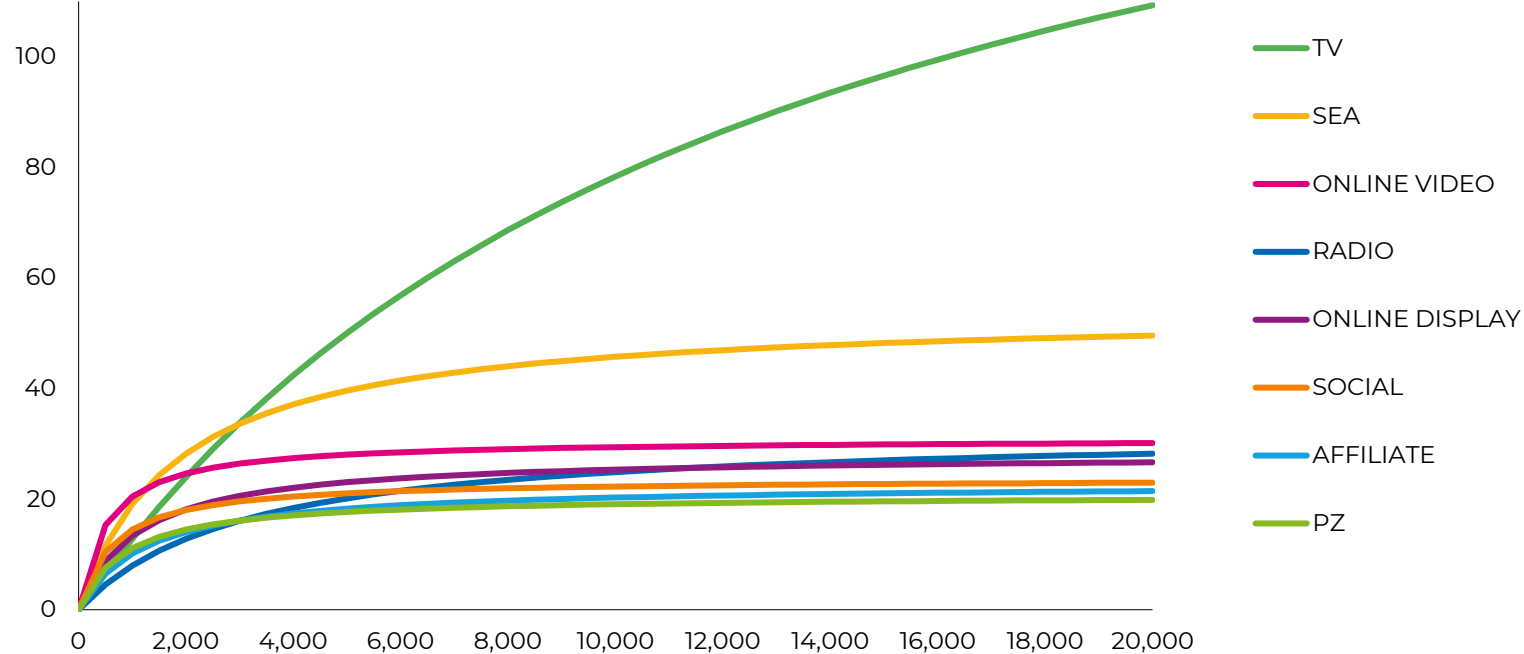
# RESULTS

## NO OTHER MEDIUM DRIVES ADDITIONAL REVENUE AS EFFECTIVELY AS TV



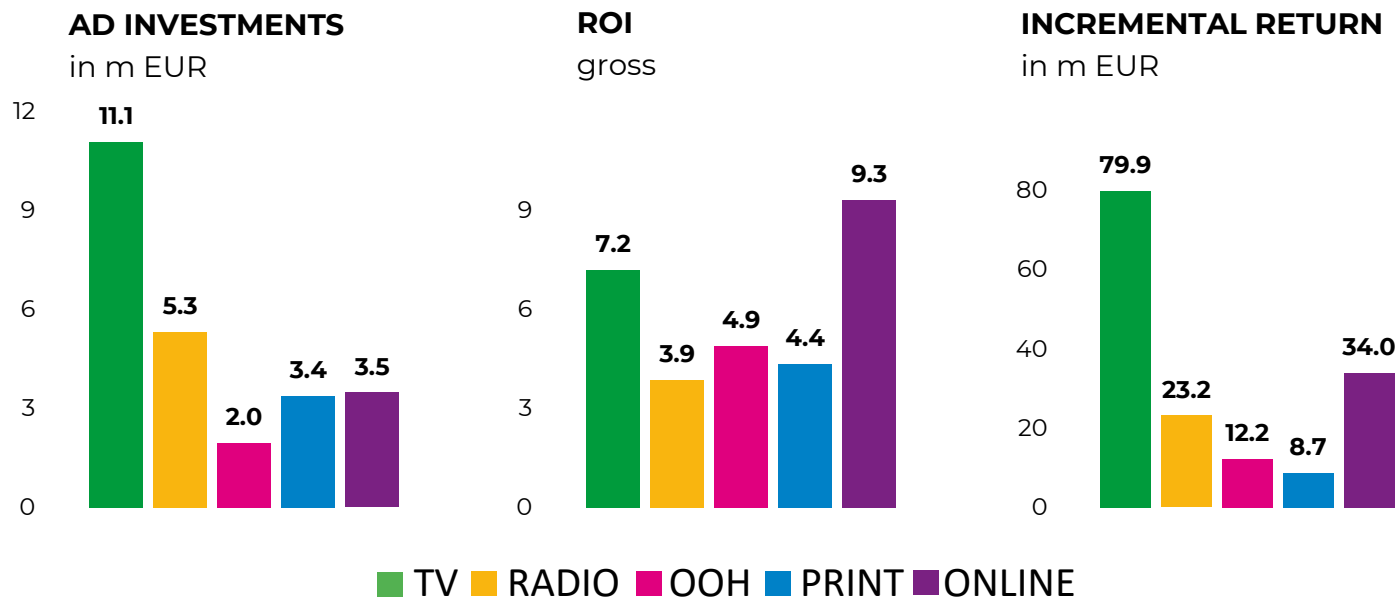
### INCREMENTAL RETURN AND ADVERTISING INVESTMENTS

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 – 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)



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](#)

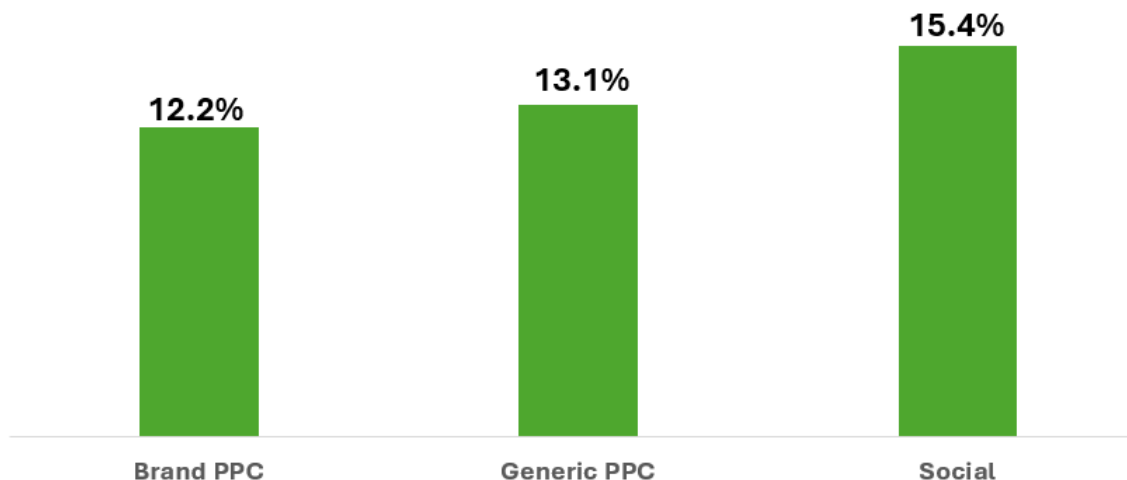


# RESULTS – multiplier effect

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%

## superior ATTENTION

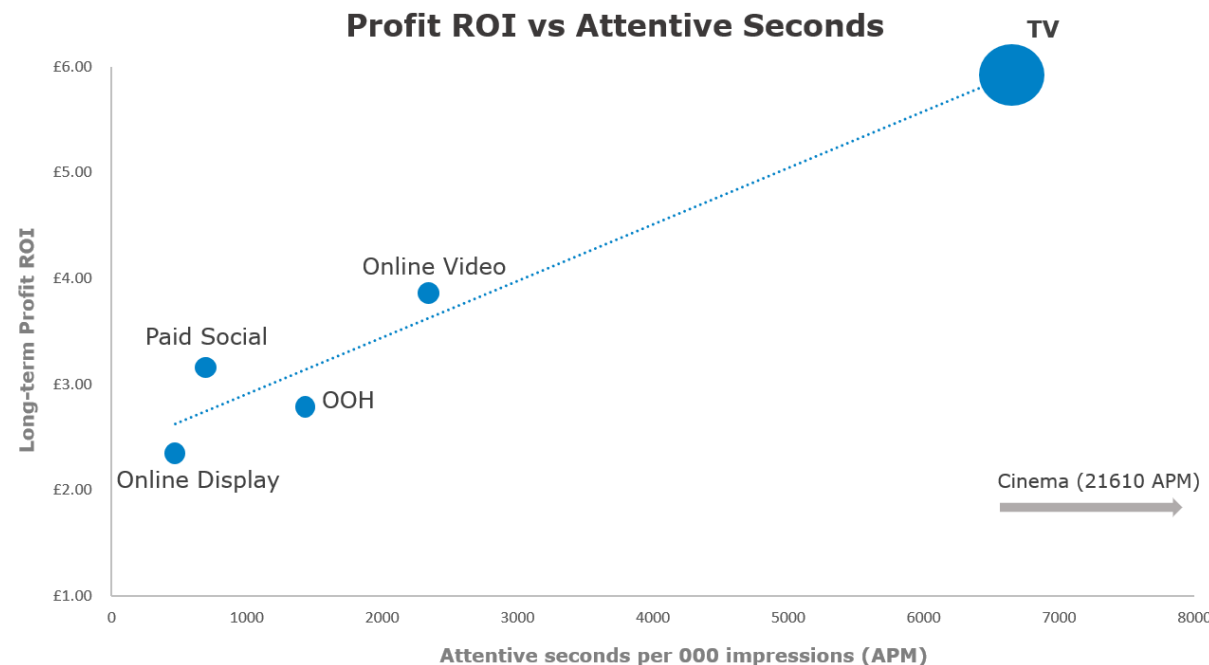
**There is a clear relationship between attention and outcomes: Attention translates into stronger brand equity and more effective advertising.**

**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 impression than online video or paid social advertising

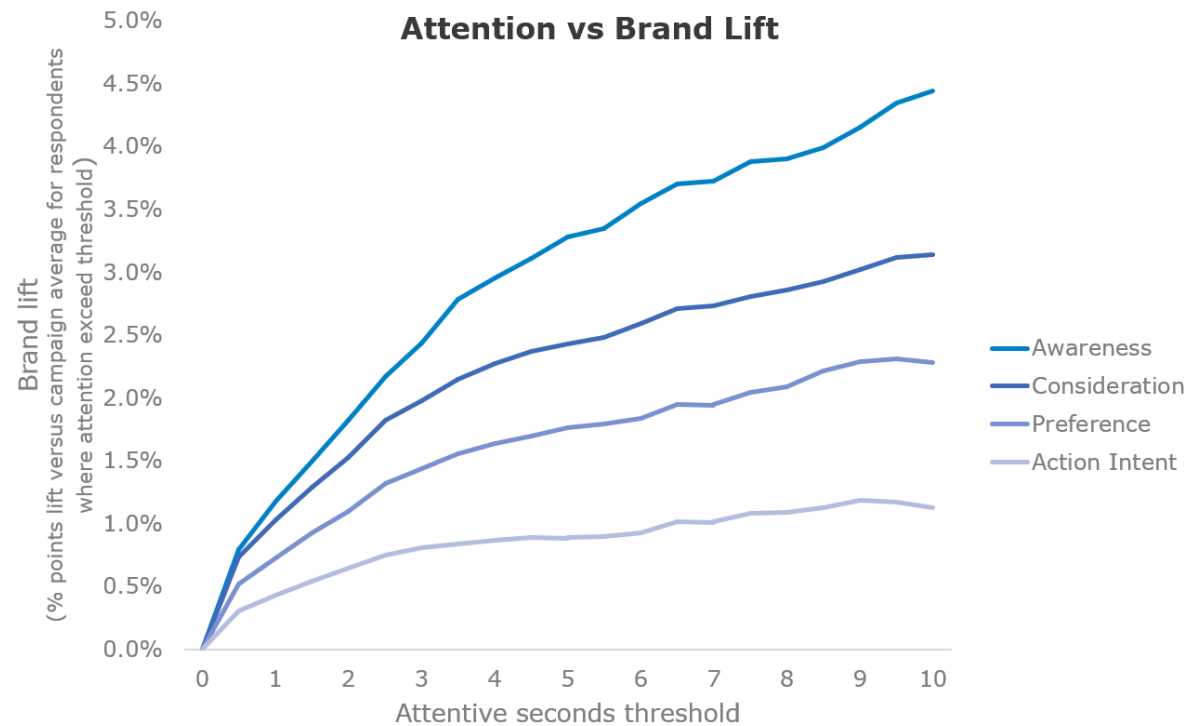


Source: Lumen & Ebiquity "Maximizing Profit through Attention", 2024

# ATTENTION

## attention drives **impact**

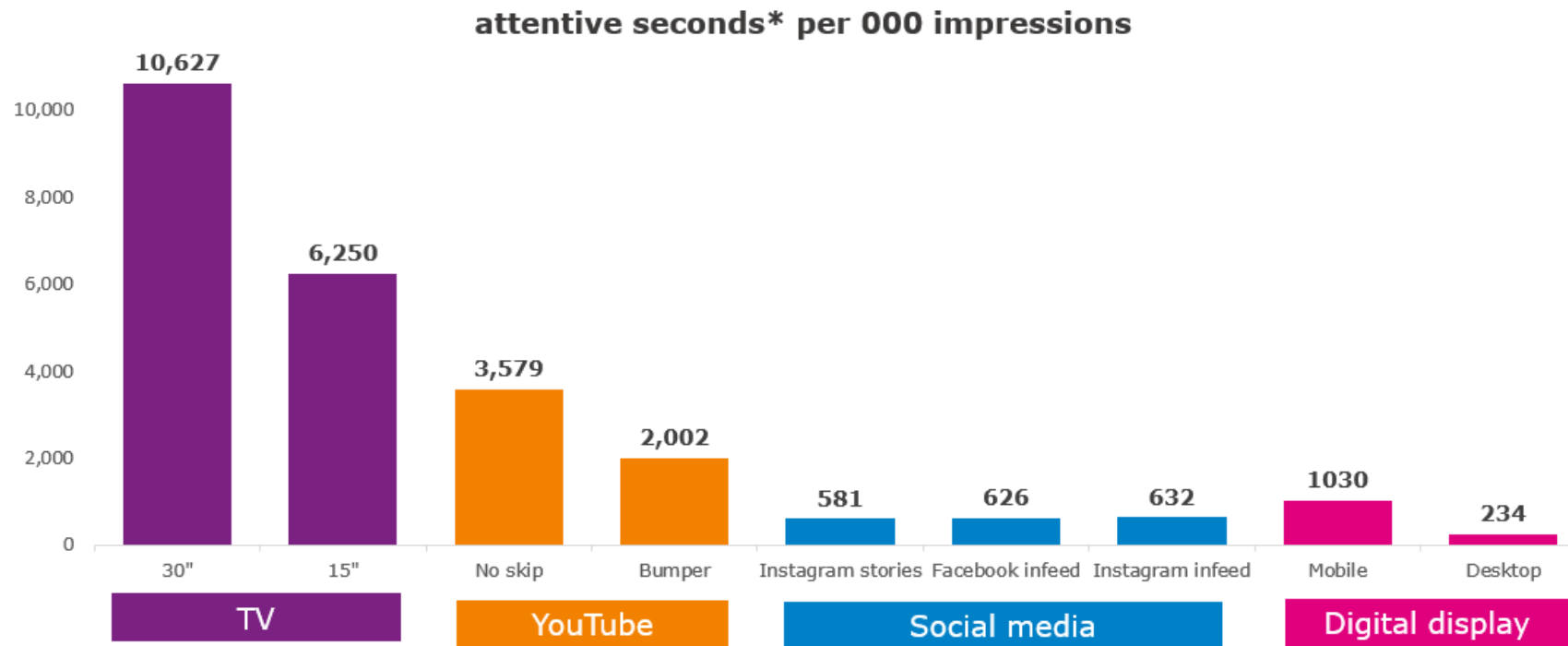
there is a clear relationship between attention and brand outcomes: the longer an audience pays attention to an ad, the greater the increase in brand awareness, consideration, preference and action intent



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 & BVOD deliver far more attention

(Instagram & TikTok get just two seconds)



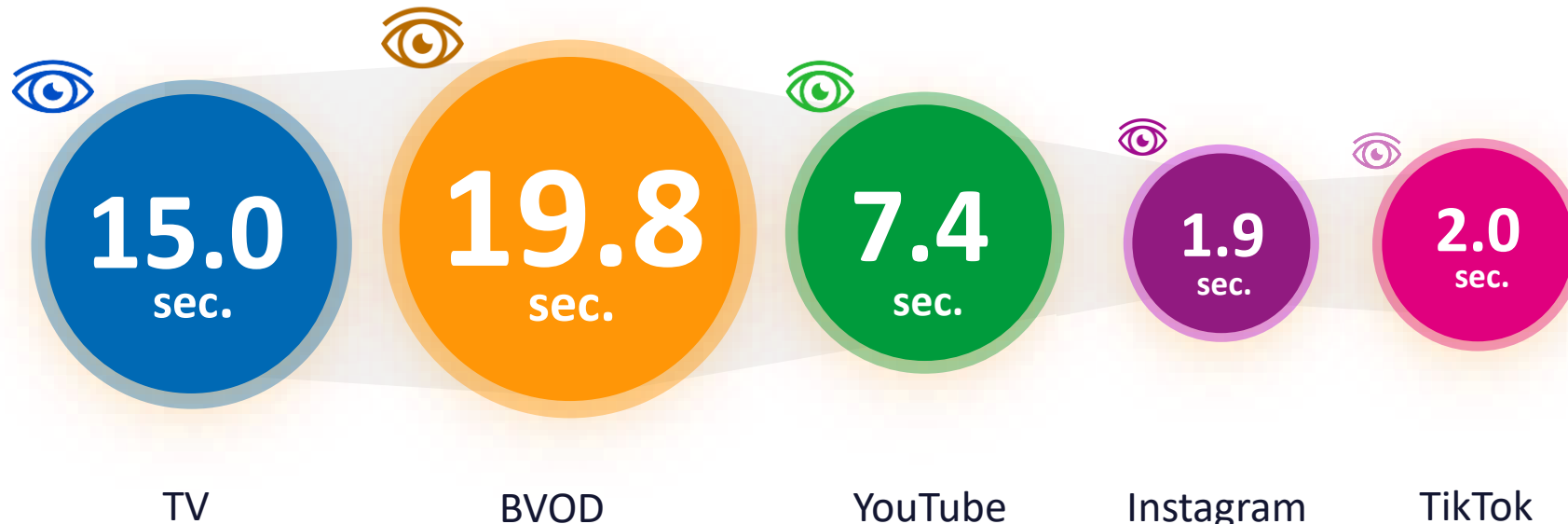
Play Duration 19.8s

22.9s

9.7s

2.4s

2.3s



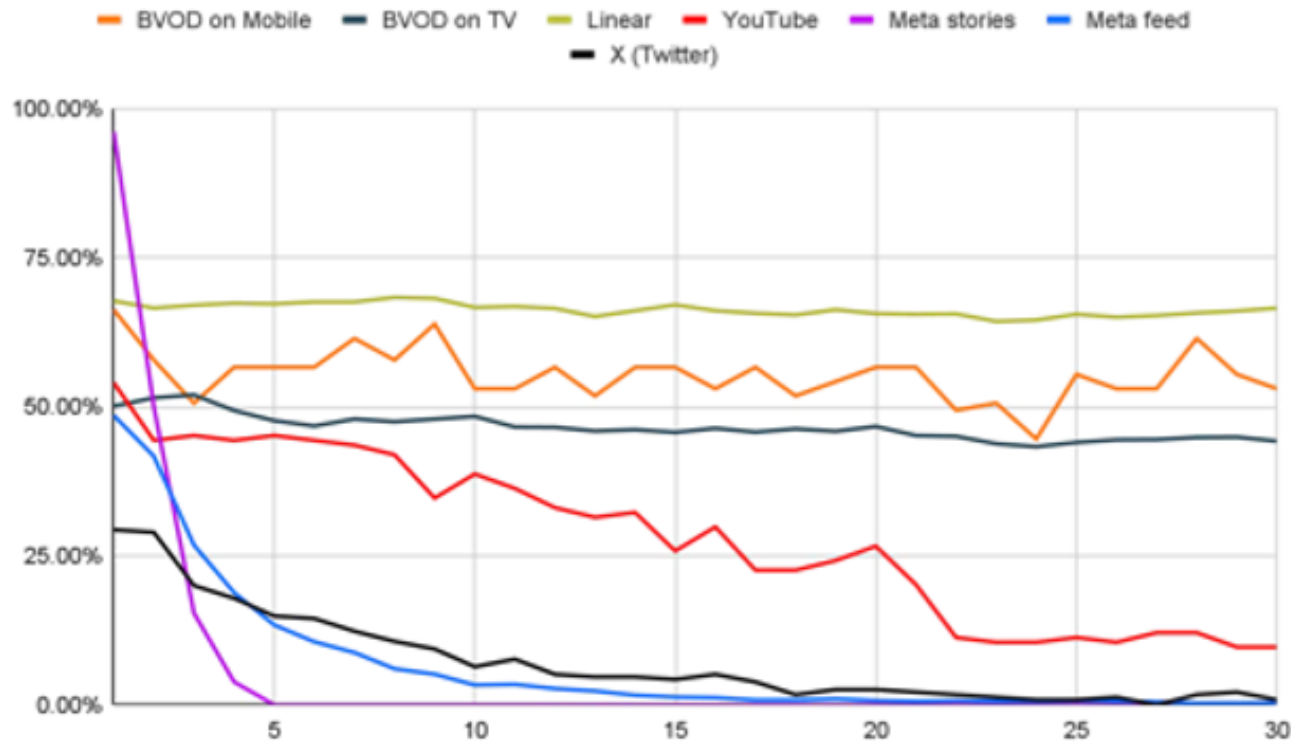
Eyes on Ad: Viewing time (median) of all video advertising contacts per platform in seconds

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.

# ATTENTION

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



Source: Amplified Intelligence/RedC Ireland AV Attention Study



# 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)



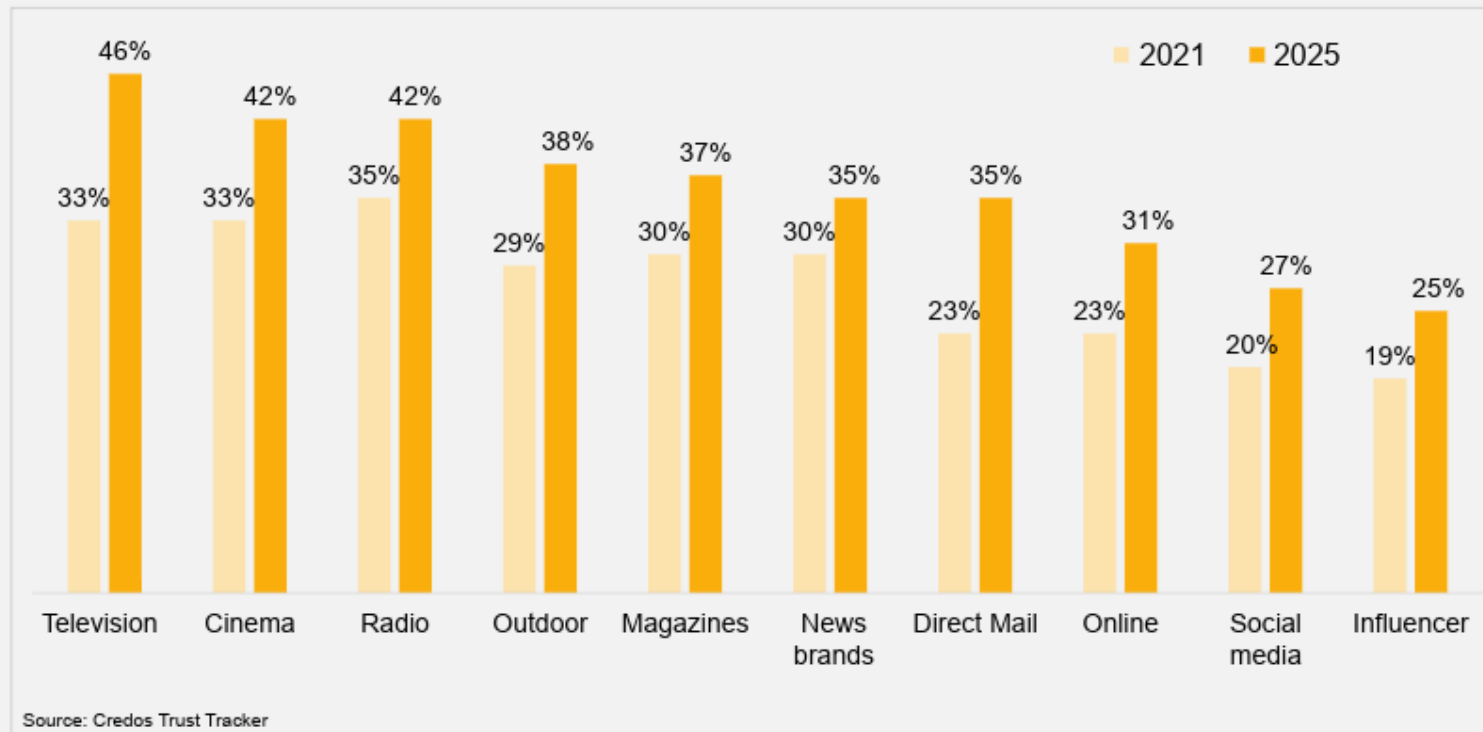
Trust increases **44%** when watching in professionally produced content vs. non-professional content (Context Effects, Map The Territory & Tapestry Research, 2024)



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



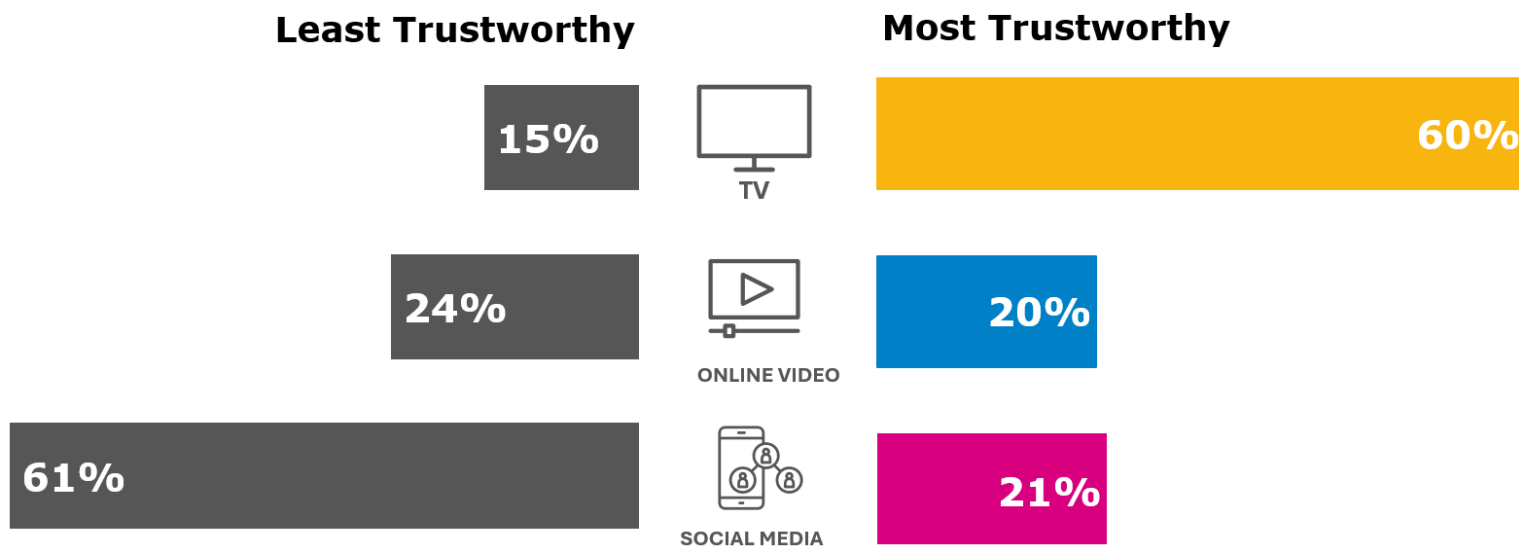


**60%** of consumers  
identify **TV** as  
the most **trusted** medium.

(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



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

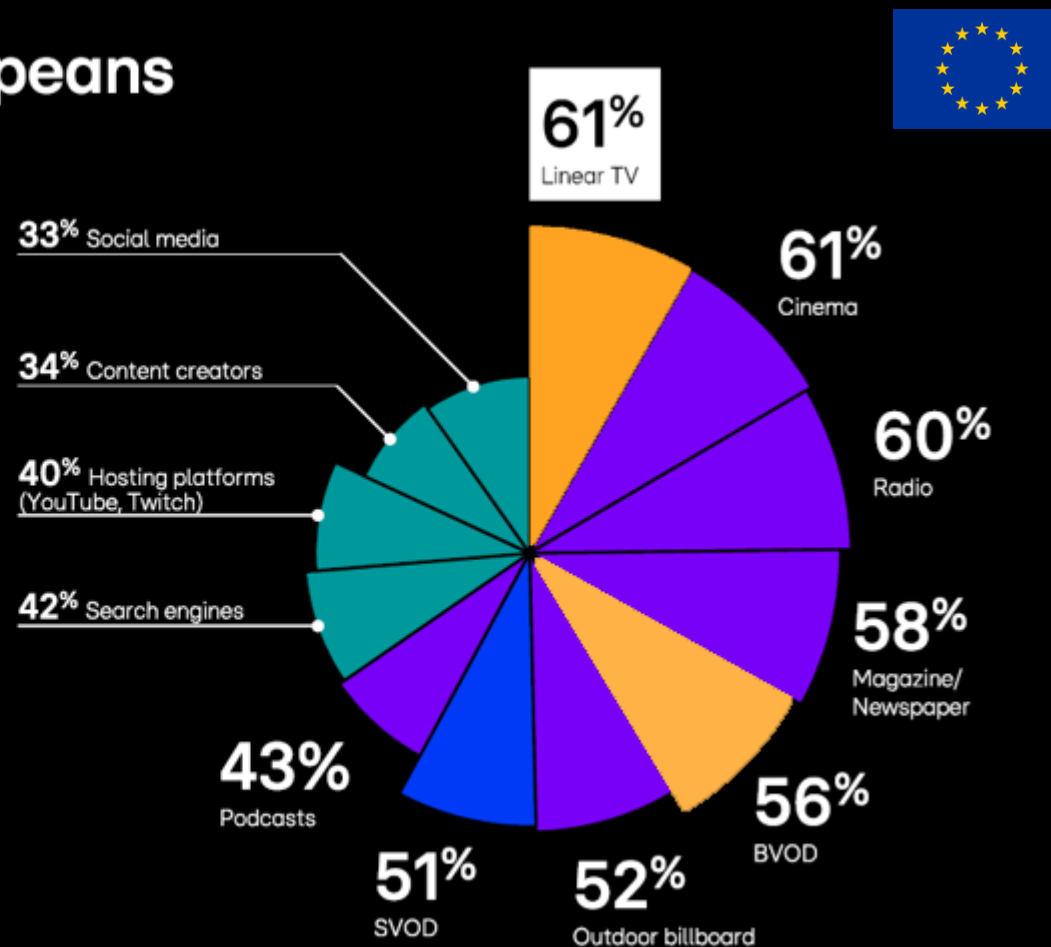
(USA, MRI-Simmons)

# 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)





**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+



**+25 pts**  
in aided  
awareness

**Habillage  
content**

## CARROUSEL RETAIL ADS



## QUIZZ SHOW



**+33 pts**  
in purchase  
intent

**AD PAUSE**

# 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

addressable and data-driven advertising

## Data-driven advertising, at scale

Unlock the power of targeted advertising with Bell Marketing Platform. Access a suite of self-serve solutions powered by Bell First Party Data and premium inventory, tailored to your business size and needs.



**+4M**  
High-speed  
Internet households

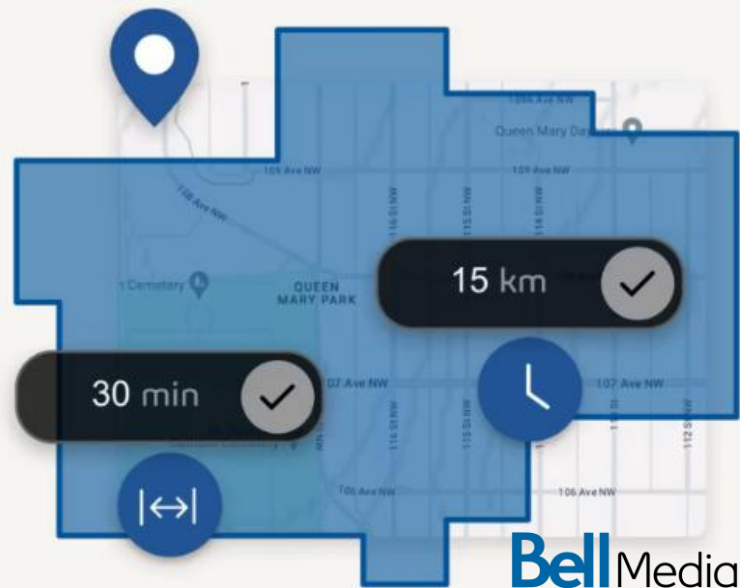
**+10M**  
mobile devices

**+3M**  
Fibe TV  
set-top boxes

Powered by Bell First Party Data

## Pinpoint precision targeting

Leverage Bell's exclusive First Party Data to pinpoint your audience with laser precision. From local geo-fencing to broad-reaching campaigns, target with confidence and make every ad count.





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