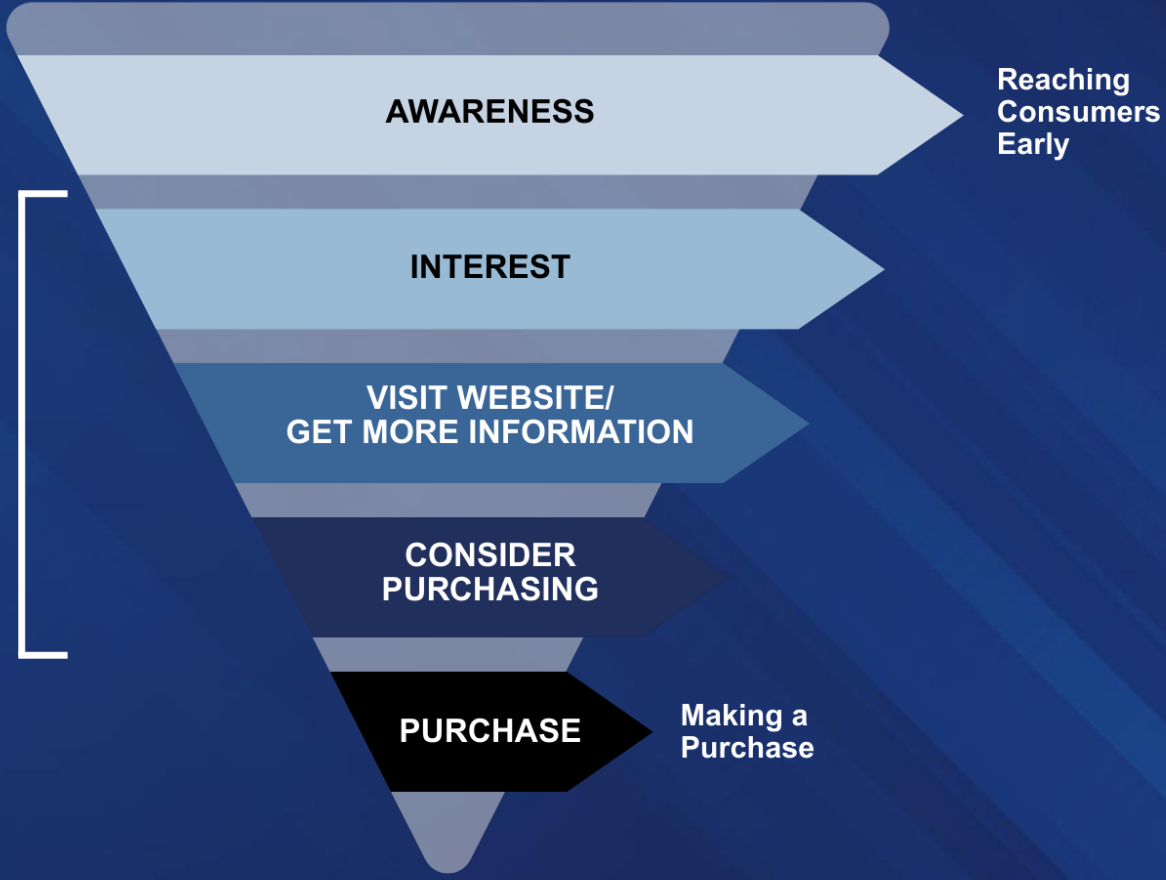


2025 Purchase Funnel Study

Synopsis



TVB
Local Media
Marketing Solutions

Key Findings: Purchase Funnel Study

- TV is the most important influencer at all stages of the purchase funnel. This is true for all categories, key demos, and ethnic groups. It is also true of streamers.
- Among those who cited TV as the most important influence for awareness, seven out of ten respondents chose broadcast TV vs. cable.
- At 68%, TV is the top platform for exposure to advertising. This is about three times that of the next five runners up.
- Exposure to a media platform is not a guarantee of consumer importance, except for TV.
- Broadcast TV is the primary source of news.
- Local broadcast TV news is #1 for trust among media platforms. Social media is the least trusted.
- 82% of respondents said that linear TV ads influence their online search selections.
- Focusing in on just streamers, the study found that streamers also deemed linear TV as most important in making them aware of a product or service.

Research Overview: Methodology

WHO:

- 4,000 interviews were collected via opt-in sample.
- To qualify, respondents needed to be age 18+ and:
 - be in the market for each product/service category*:
 - Product/service categories: Automotive, Banking/Financial, Furniture/Bedding/Carpet, Legal, QSR (Quick-serve/Fast Food Restaurants), Retail (In-store & Online)
 - Have seen/heard or read an advertisement for that category in ANY of about 20 media platforms both traditional and digital, in the past 2 months.
- Each respondent answered a series of questions for up to three product/service categories.

WHEN: Interviews took place December 5, 2024 - December 20, 2024

WHAT:

- Via 14-minute online quantitative survey about the influence of advertising platforms at each stage of the consumer purchase decision and attitudinal questions.
- Respondents were given the choice of taking the survey in either English or Spanish.

The General Overview presentation that follows includes all six categories.

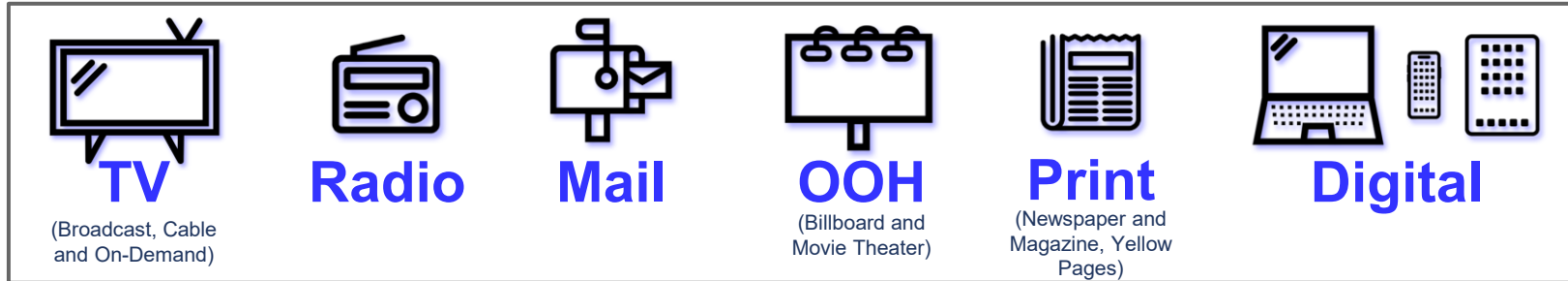
** Definition for being "in the market" for each category was based on shopping frequency and/or current product ownership/planned purchase (actual criteria differed by category)*

Source: GfK/NIQ TVB Purchase Funnel 2025



These are the media platforms measured

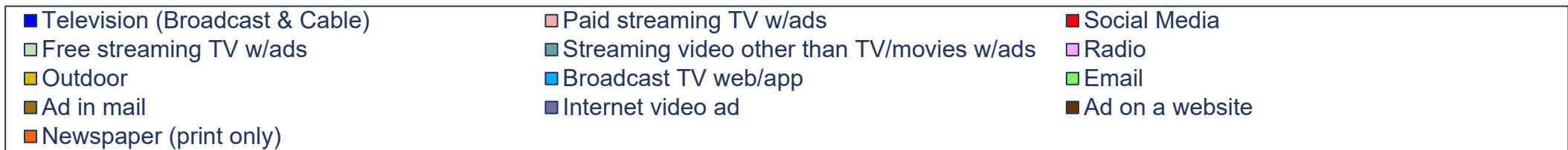
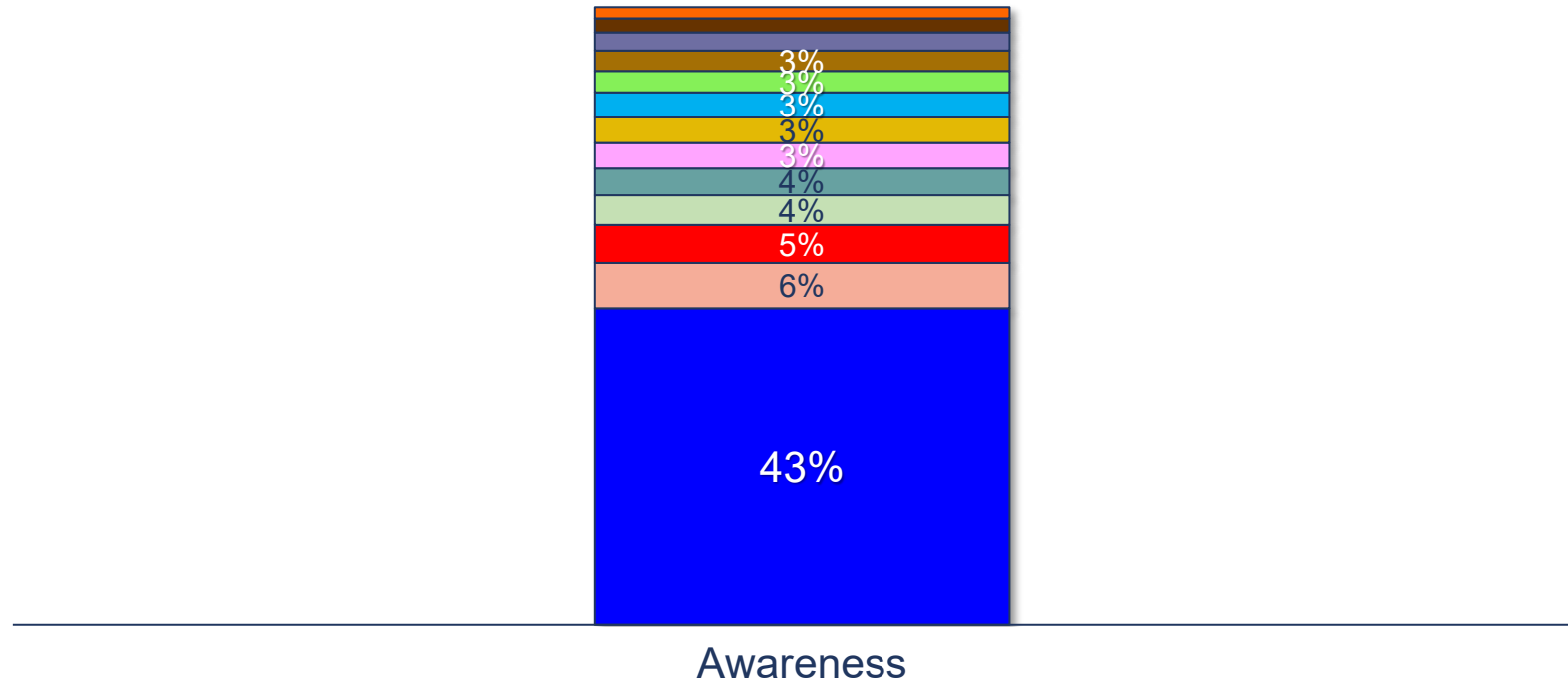
Respondents did not have to be exposed to a TV ad to be included in the study



Digital media include:

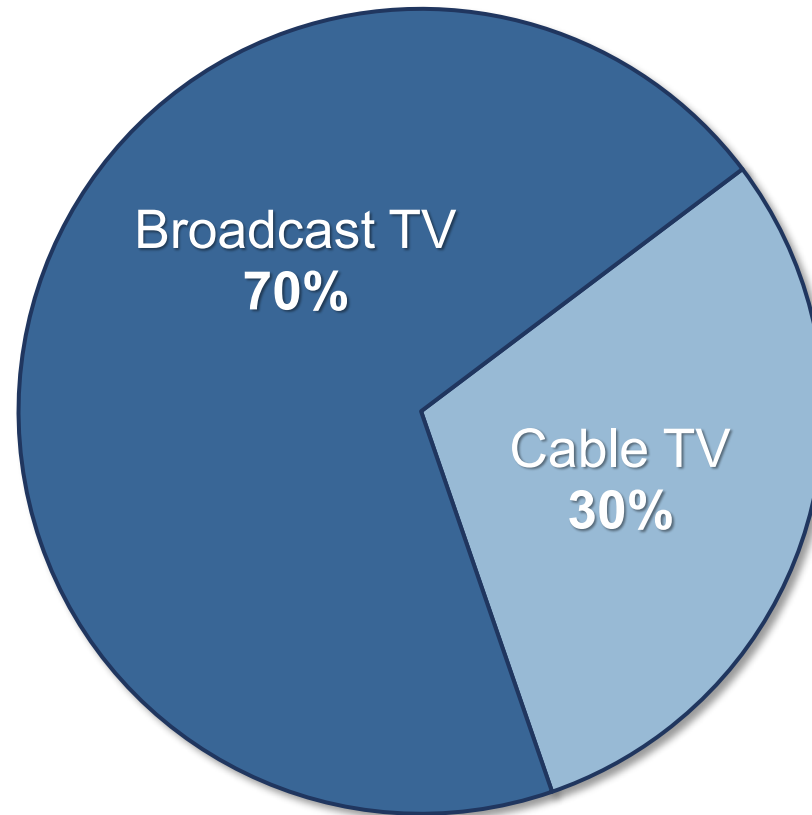
- Cable site/app
- Consumer review site/app
- Display/banner ad
- Email ad
- Internet radio
- Local radio station site/app
- Local TV station site/app
- Network TV site/app
- Magazine
- Newspaper
- Search engine
- Social media
- Streaming TV services
 - Free Streaming TV with ads
 - Paid Streaming TV with ads
 - Streaming video other than TV/movies w/ads
- Video ad
- Yellow Pages site/app

Consumers Chose Television as the Most Important Media in Making Them Aware of a Product/Service



Of Those that Cited TV as the Most Important in Awareness Phase, 7 Out of 10 Picked Broadcast TV

All 6 Categories:



Source: GfK/NIQ TVB Purchase Funnel 2025 A18+

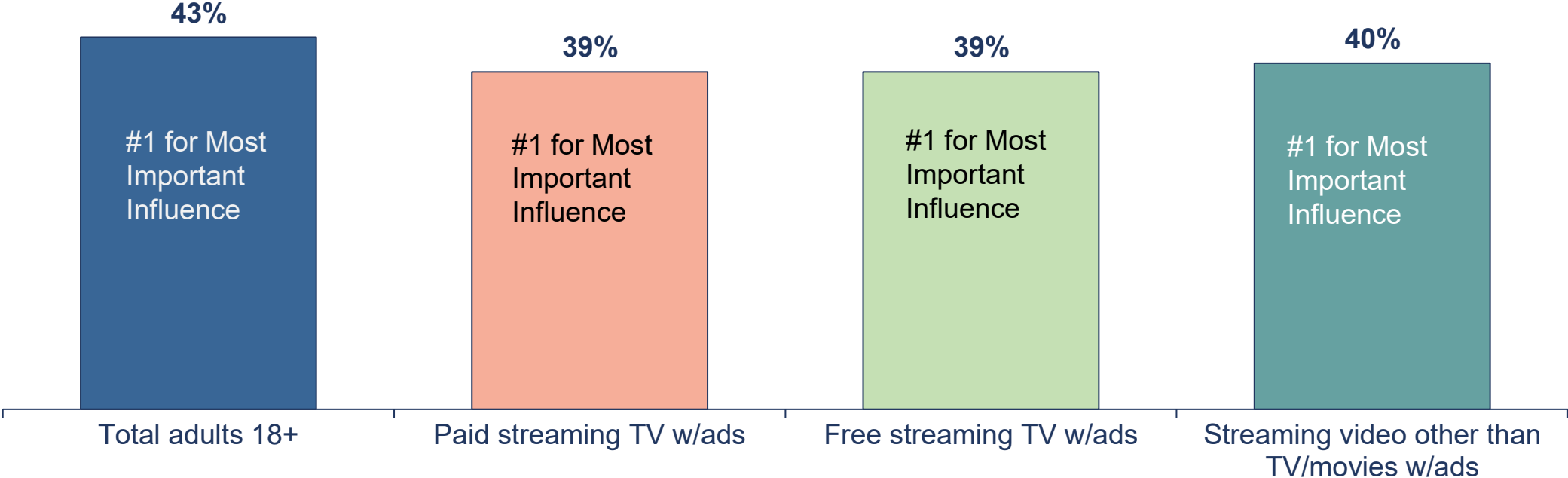
QA4 "Thinking about the ads you saw/heard for the categories, which advertising media made you most aware of the category?"

How to read: Of the 43% who chose television as most important, 70% chose broadcast TV



Streamers Deemed Linear TV the Most Important Influence for Awareness

Most Important for Awareness Linear TV (Broadcast/Cable)



To be read as: Looking at those exposed to free steaming with ads (FAST, AVOD) as their own universe, 39% deemed Linear TV as the most important influence for the awareness of a product/service.

