

A child in a white space suit with a circular hatch on the back is sitting on a dark, textured surface, looking at a large television screen. The screen displays a vibrant image of the Earth from space, with a bright yellow sun or star in the upper right corner. The room is dimly lit, with a bed and a lamp visible in the background.

A report

TV as a full-funnel channel:

An evidence-based guide to understanding television's impact

WARC

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ADVISORY

Introduction to this report

TV has long been seen as the domain of brand building, but it’s often undervalued by advertisers whose models fail to capture its full impact.

In reality, TV can and should be planned as a full-funnel channel: one that builds brand equity over time while also delivering short-term, measurable performance.

Developed in partnership with Marketing Architects, this report curates key evidence for how marketers can unlock the full value of TV across today’s fragmented media landscape.

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Foreword from WARC



Alexis Wolf

Head of Advisory, Americas
WARC

TV stands at a critical juncture, caught in the crosshairs of what Peter Field describes as a “crisis in creative effectiveness.” WARC’s annual Marketer’s Toolkit Survey consistently reveals that short-termism remains the paramount strategic challenge marketers face.

This pressure to prioritize immediate results over sustainable, long-term investment undermines true growth potential. WARC has responded with a report called “The Multiplier Effect,” which concluded that the ongoing tension between brand and performance marketing is ungrounded.

In fact, both jobs need to be done and, when done together, they see powerfully amplified results.

TV’s true effectiveness story has been lost in this shuffle. While marketers tend to assume digital channels have eclipsed TV’s impact, the data reveals a different story. Investment in linear television decline is outpacing actual viewing decline, revealing a disconnect between perception and opportunity.

As with most things, the truth of what this channel delivers is more nuanced: television actually possesses full-funnel potential. When leveraged strategically, TV serves as both a long-term brand-

building powerhouse and a catalyst for short-term activation. In fact, it often drives the very clicks that digital marketers obsess over.

For marketers serious about achieving long-term growth, understanding the modern role TV plays is essential.

We’ve curated this report with the key evidence you need to know to navigate the landscape. We hope it serves as a field guide to understanding TV’s impact.

Foreword from Marketing Architects



Angela Voss

CEO

Marketing Architects

I spent much of my career in performance marketing. So I understand the pressure to prove ROI. To show results fast and to make every dollar work harder than the last.

That's why I also understand why so many marketers have walked away from TV. It's long been seen as too expensive, slow, and hard to measure. And in some cases, they're right. The traditional TV model was built for a different era.

But what I've seen working alongside brands every day is that TV still works. In fact, it often outperforms expectations. We've helped brands

cut acquisition costs. Build awareness that unlocks category leadership. Drive results far beyond what their models predicted.

And not because we chose between brand or performance. But because we planned for both. That's the shift more marketers need to make. To stop treating TV as a one-trick channel. And start building campaigns that reach the right people and move them to act.

Too often, advertisers measure TV narrowly, judge it too quickly, or use it like digital with a bigger screen. That's not fair to the medium. Or to the business outcomes it can deliver.

So we partnered with WARC to share the strategies and evidence that prove what's possible when you set TV up to succeed across the full funnel.

Because marketers shouldn't have to choose between short-term sales and long-term growth.

TV can do both. Let's build campaigns that do the same.

Why this matters now

Marketing effectiveness is under growing threat, as budget pressures and flawed measurement push plans toward short-term gains at the expense of long-term growth.

TV is misunderstood and undervalued in models that miss its full impact and overlooked in strategies that provide narrow targeting.

The evidence tells a different story.



Advertising has two jobs. Most plans only serve one

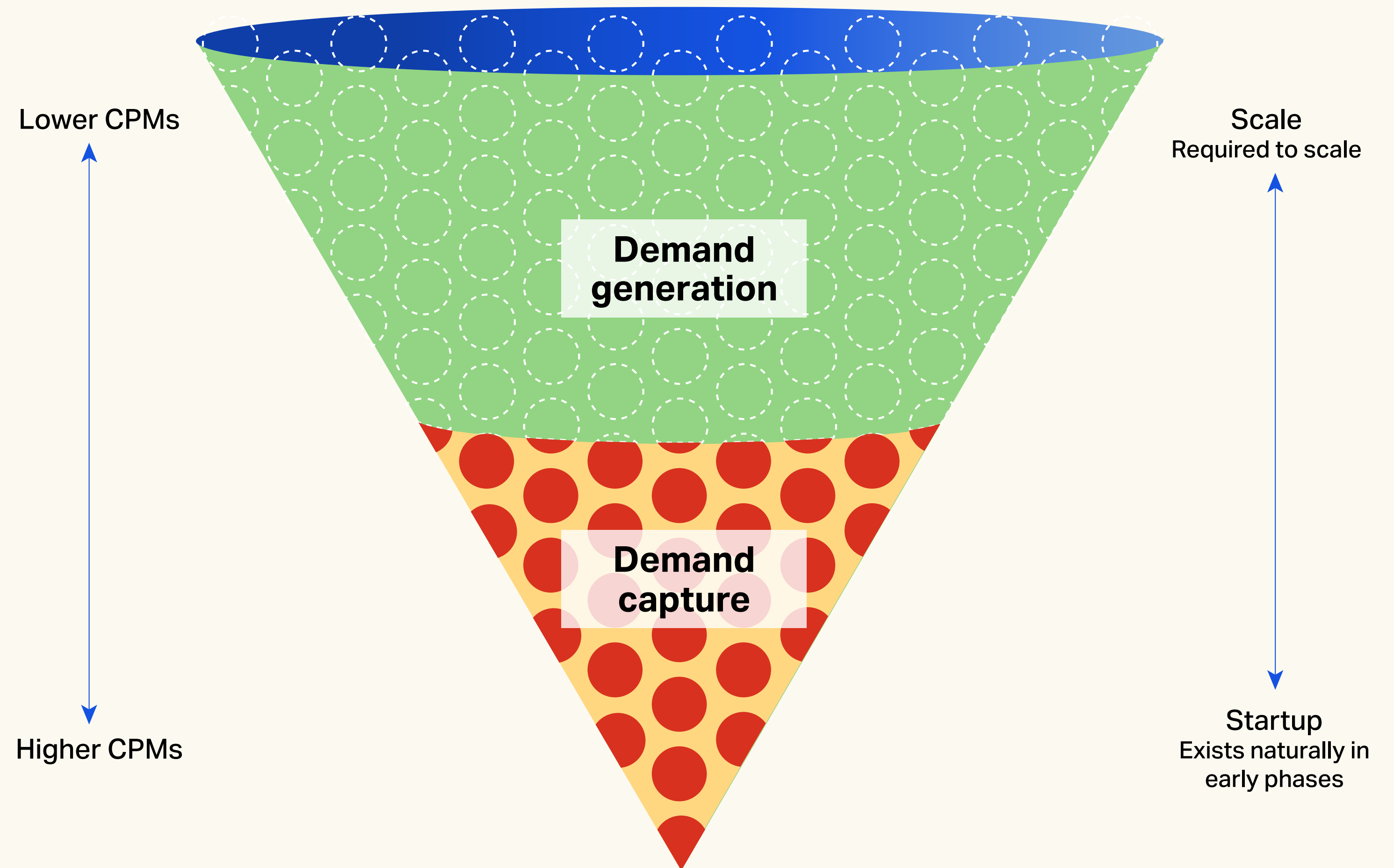
Great marketing has two essential roles:

First, it must **engage a broad pool of future buyers** by building the memory structures and brand preferences that ensure long-term growth.

Second, it must **nudge those who are already in-market towards action**, i.e., driving short-term sales.

Yet today, budget pressures and narrow measurement practices are pushing plans disproportionately toward the second job.

This leaves one of marketing's essential tasks **underfunded and undervalued**.



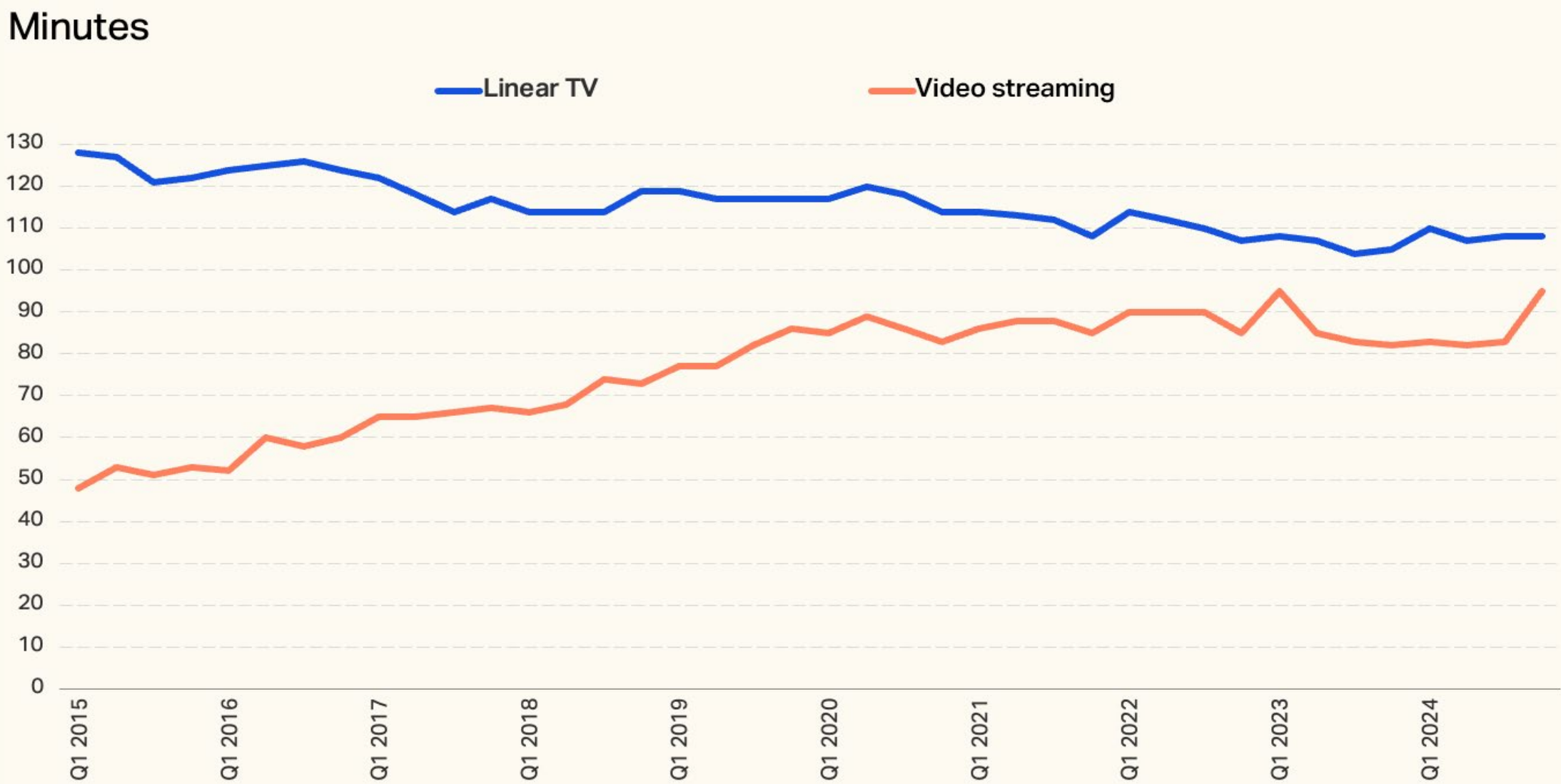
Source: Marketing Architects

TV still works... if you give it time

Marketers are chasing clicks and leaving long-term value on the table. WARC's latest Global Ad Trends shows linear TV ad spend has fallen **28% since 2014**, a sharper drop than actual TV viewing.

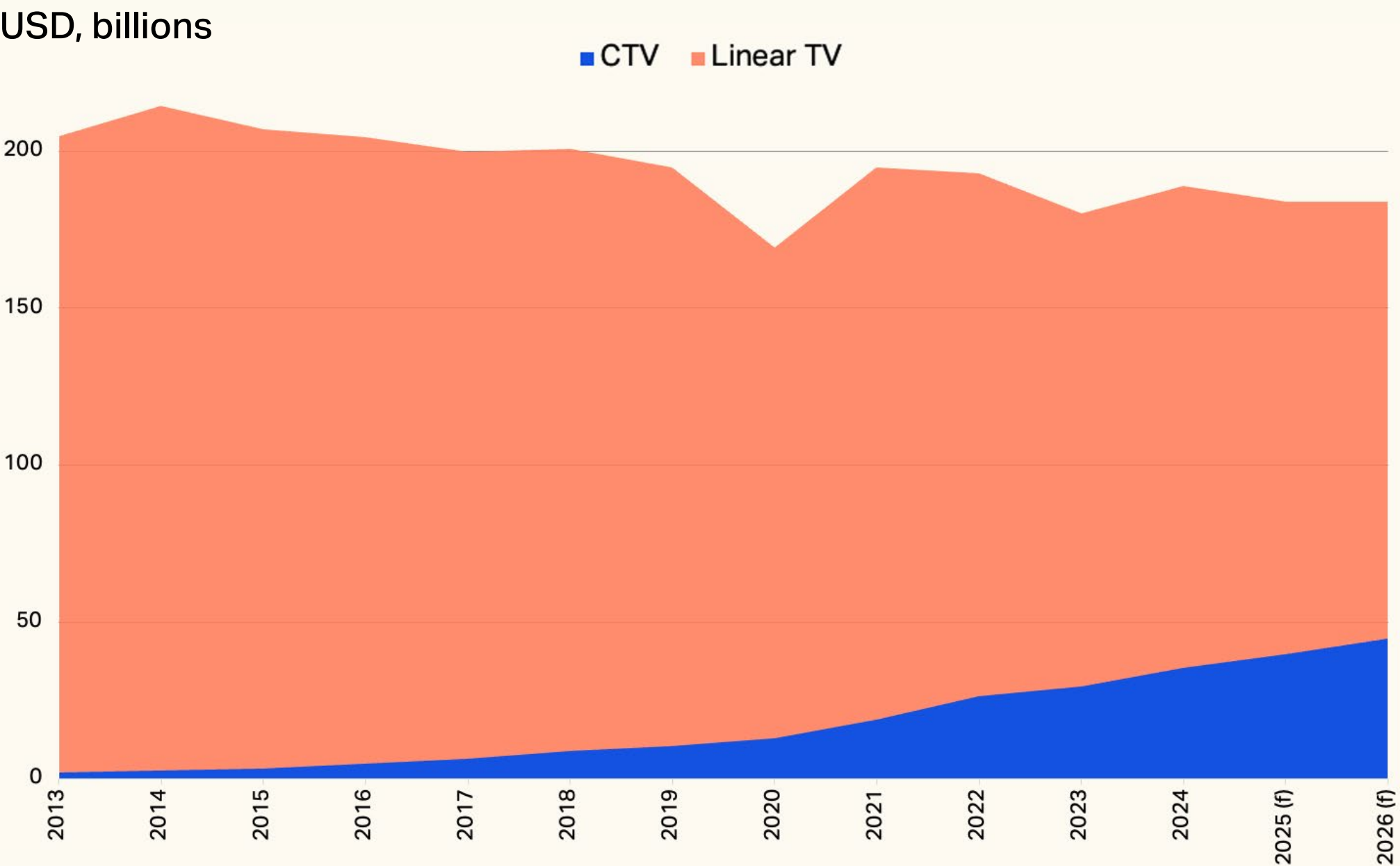
Under pressure to prove quick returns, many brands are over-investing in social and retreating from proven, long-term growth drivers like TV.

Global, all adults, average daily consumption,
Q1 2015 to Q4 2024



Source: GWI, WARC Media

Global, TV advertising investment



Note: Periods denoted with (f) are WARC forecasts. All ad investment with YouTube - irrespective of the device on which it is shown - is counted separately in online video. See glossary page for CTV ad spend definition in this report.

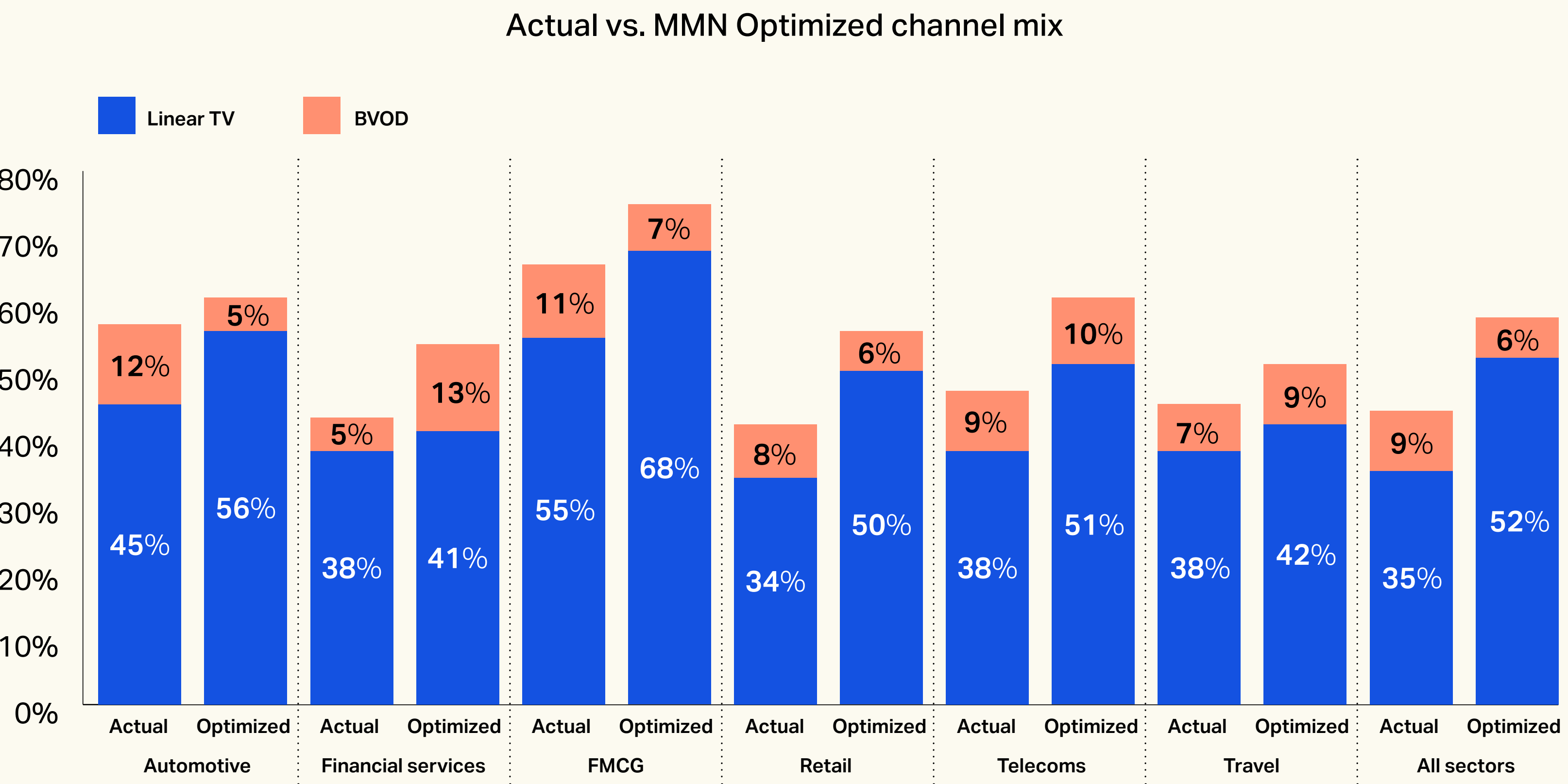
The marketing trap

As a result, advertisers are continuing to **overinvest in digital channels** at the expense of television.

As Richard Kirk, one leading UK media planner warned, brands may now be spending “three times too much on social.”

“**The pendulum appears to have swung too far and too fast away from TV**, with other elements of AV (online video, cinema) not being utilised fully enough.”

Across all sectors, optimized scenario recommends higher share of AV media vs. actual databank share



Optimized based on £500m brand size (E300m for FMCG). 21-30% online sales, mass market, high risk and media budget of E20m
Source: Richard Kirk, The Media Leader. Data analysis of EssenceMediaCom Media Mix navigator. 2024

The advertising doom loop

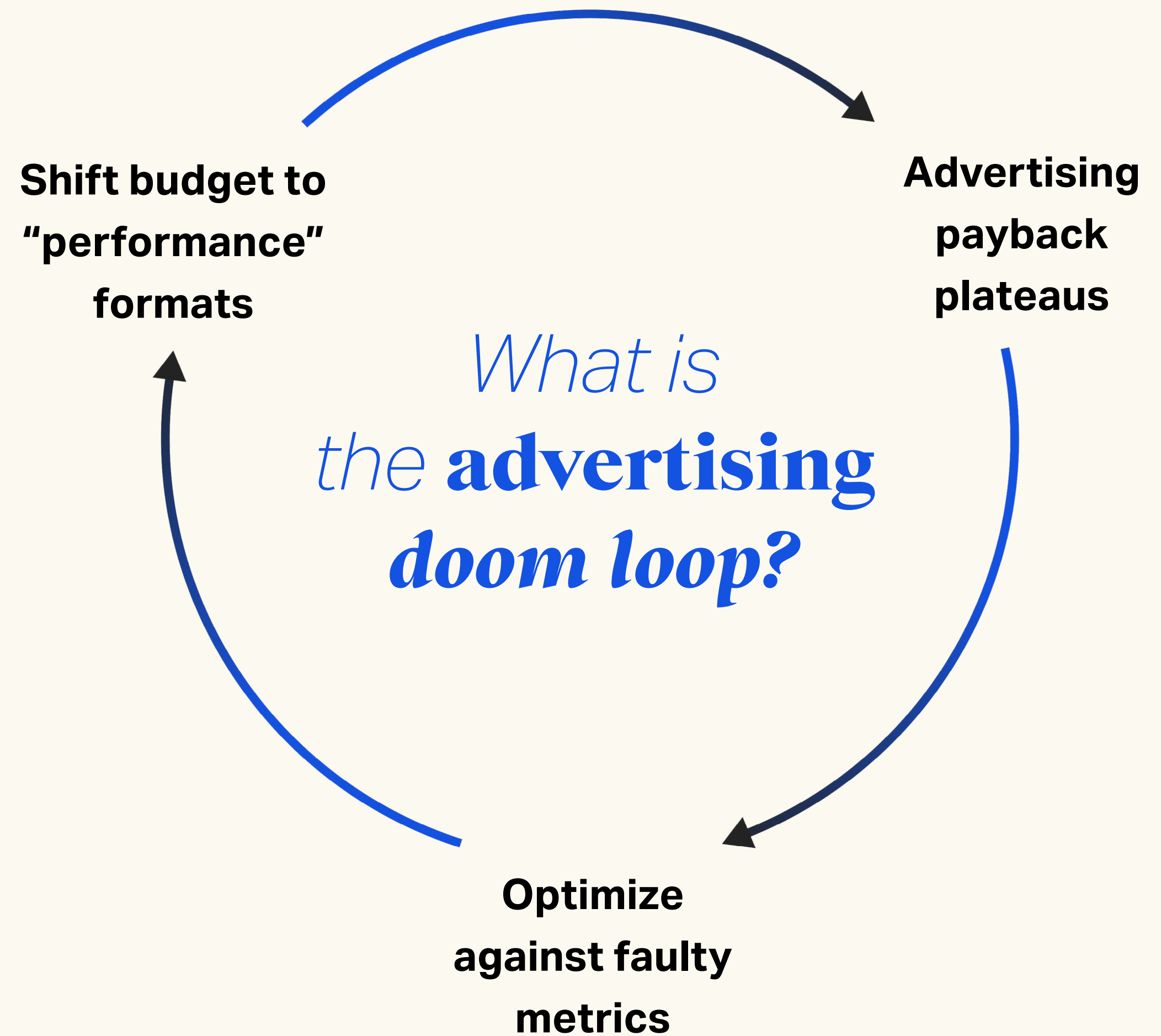
Over-optimizing the short term is **stalling long-term growth**.

When marketers focus too heavily on the short term, it creates a **self-reinforcing cycle**:

Performance targets drive a squeeze for quick results...

... which leads to cuts in brand investment...

... and ultimately causes growth to stall.



Source: The Multiplier Effect

The measurement gap

Faulty attribution systems are **directing spend into the wrong channels.**

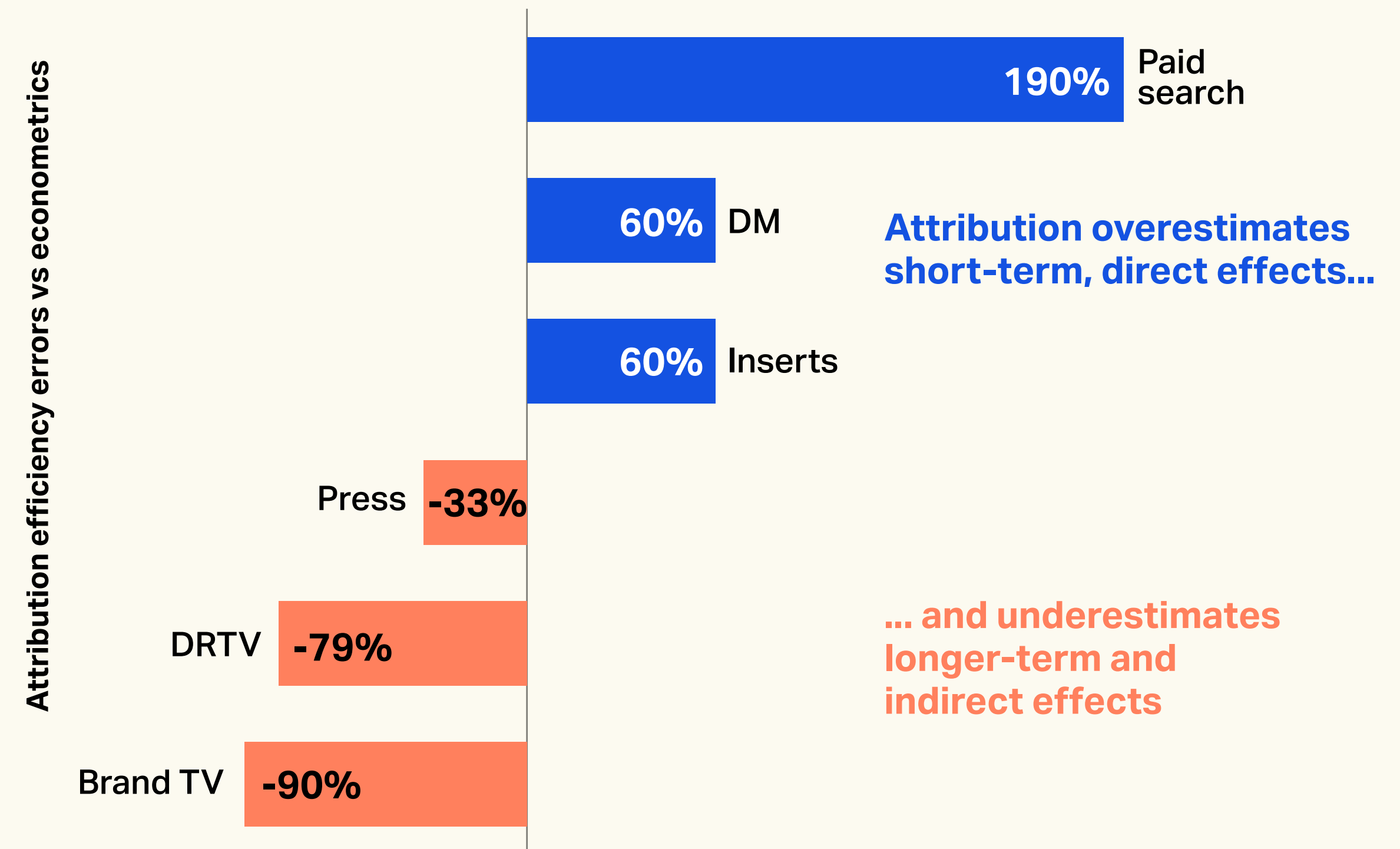
Television, in particular, is undervalued in models that are optimized for last-click metrics – leading advertisers to **misallocate budgets and miss opportunities** for sustainable growth.

Analytic Partners' research found **search is over-credited by nearly triple** (190%), while equity-led TV is under-credited by nearly double (90%).

Meanwhile, a Marketing Architects survey revealed that **fewer than four in 10 marketers are confident** in their ability to measure TV effectively.

How bad is the attribution problem?

Last-click attribution can overestimate the impact of channels like paid search by as much as 190%

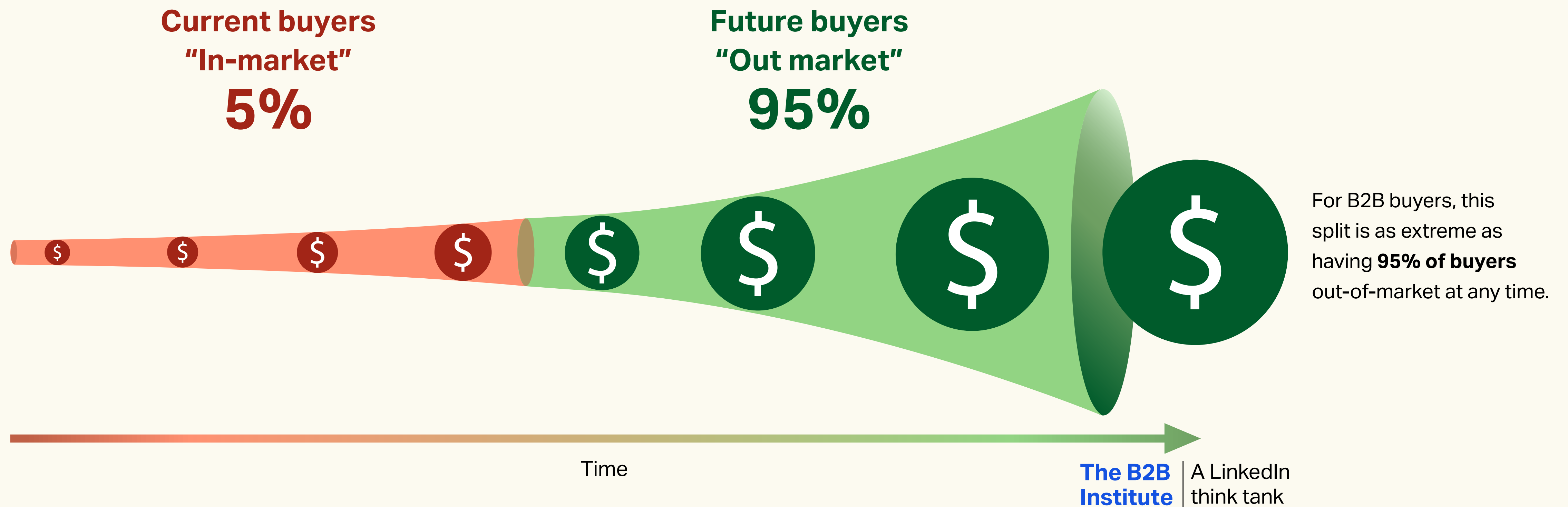


Source: Analytic Partners

Reframing the funnel

Therefore, marketers risk overlooking a fundamental truth: most buyers aren't ready to purchase right away, which is why **brand memory is critical**.

To sustain growth, **advertising must work across the full funnel**: Targeting both the minority of buyers who are in-market now and the majority who are out-of-market but represent future demand.



Source: the 95/5 Rule; The B2B Institute (LinkedIn)

Full-funnel strategies deliver better returns

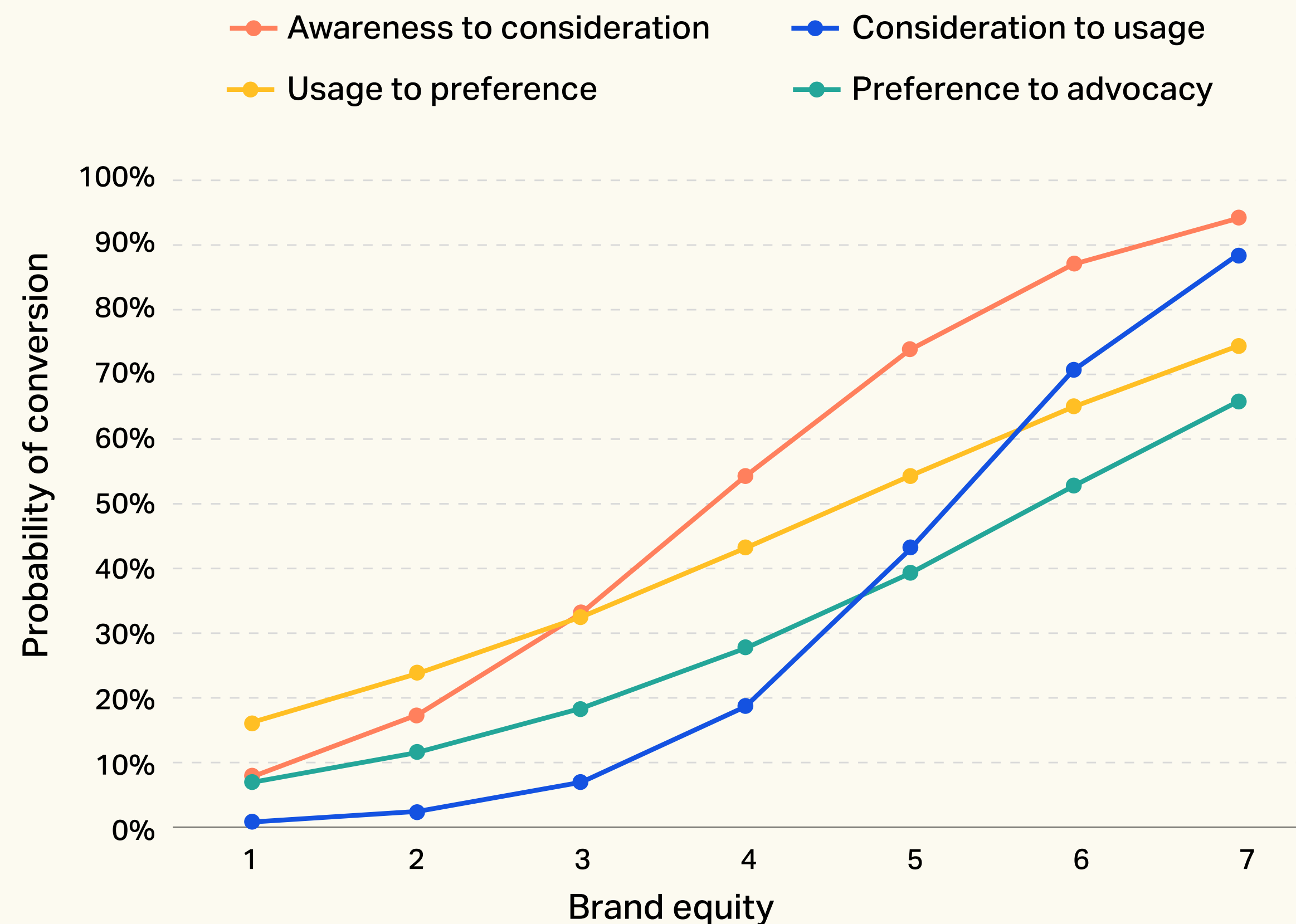
Brands that invest across the full funnel (awareness, preference, usage, and advocacy) see stronger overall performance.

BERA.ai analyzed four years of brand equity and media spend data for a client and found that **higher equity led to better results** at every stage of the funnel.

Most importantly, **cost-per-conversion was 23% lower** when equity was high versus when it was low. This shows that building brand equity improves both effectiveness and efficiency.

A full-funnel strategy maximizes return across the entire customer journey, making each marketing dollar work harder.

Brand equity impact on funnel conversion

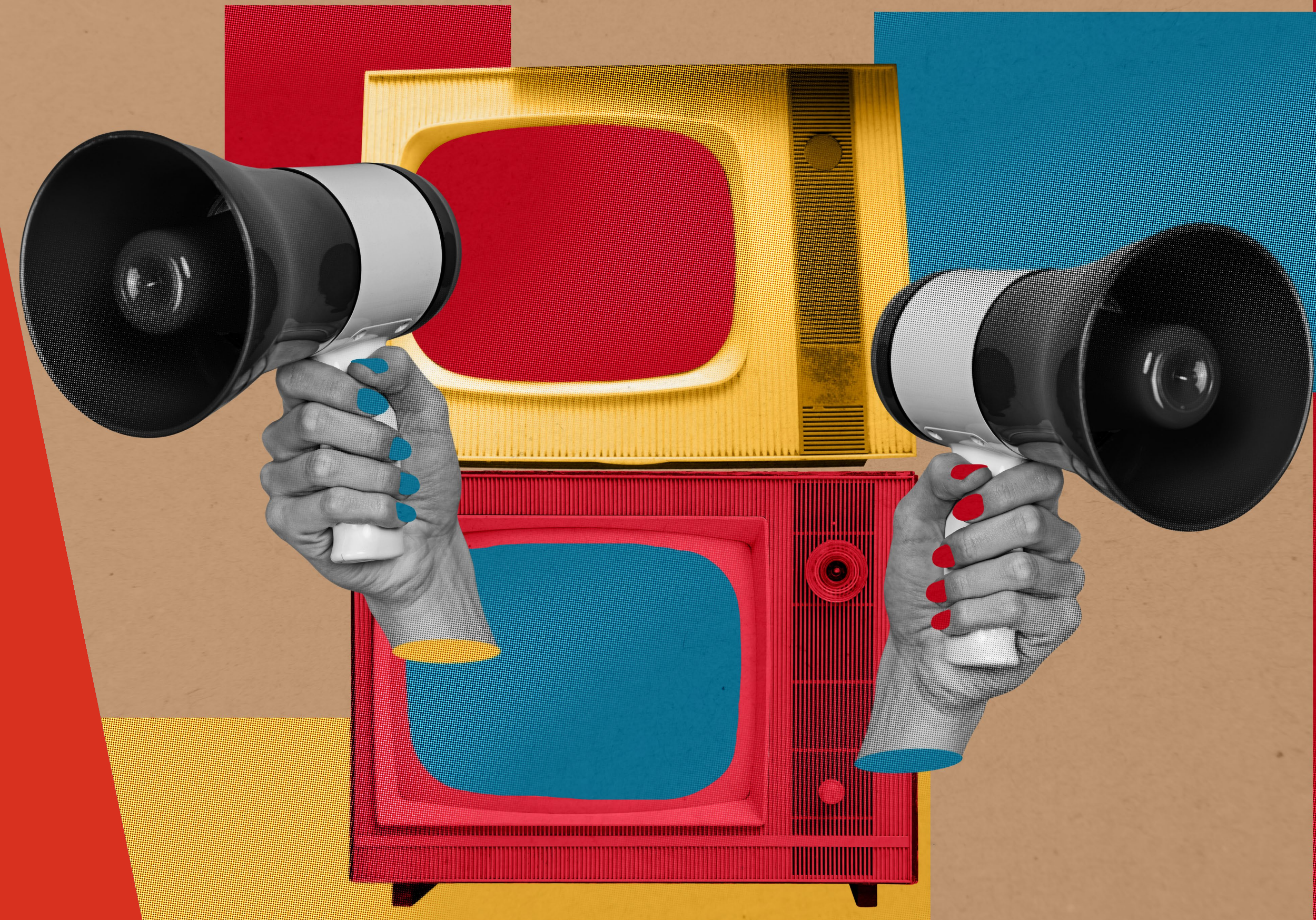


Source: [The Multiplier Effect](#) p.52

What TV really delivers

It's not just about reach or recall.

TV amplifies the impact of the entire media plan, strengthening the performance of other channels and improving overall effectiveness.



TV is already doing more than you think

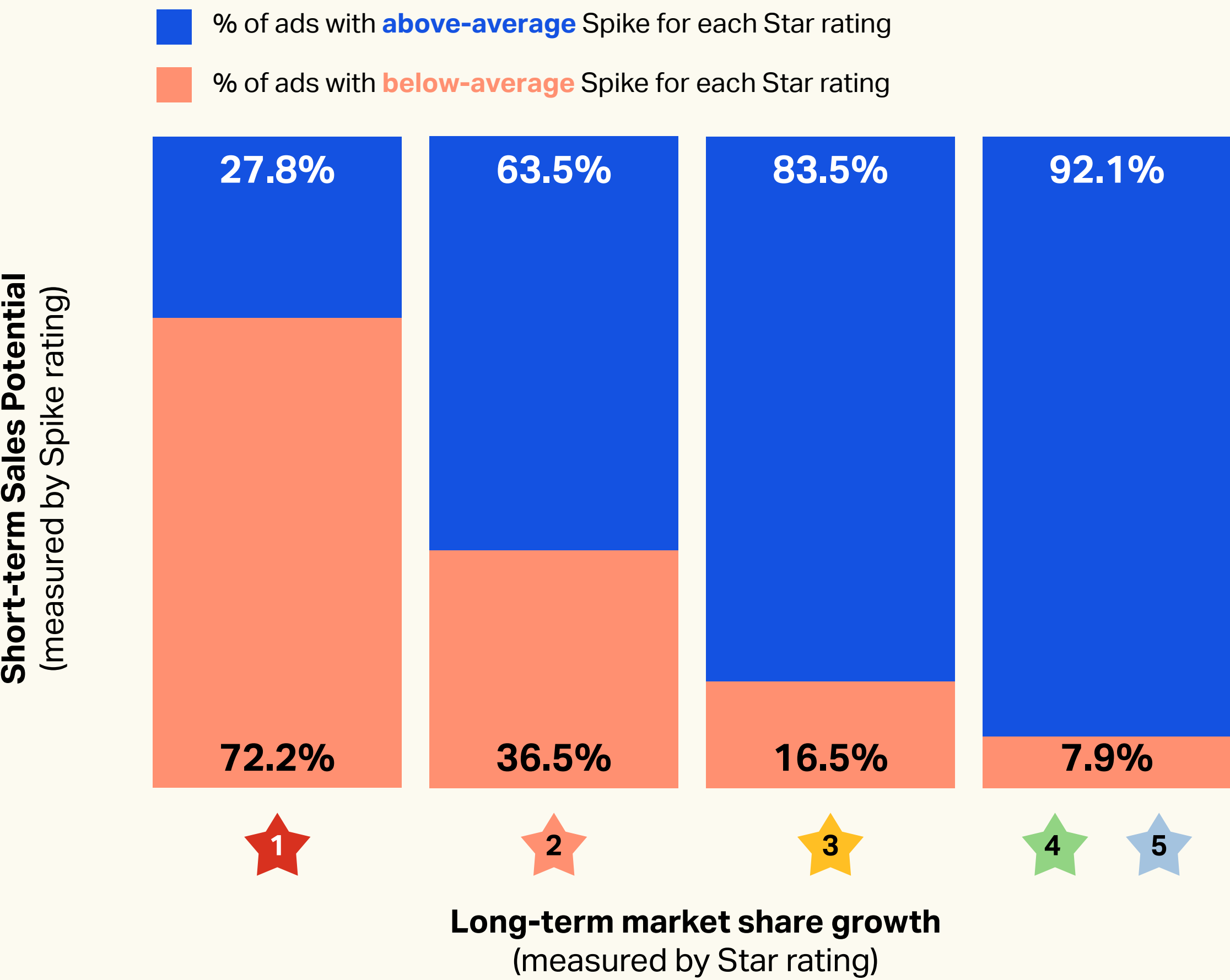
Television is a brand-building engine that creates long-term equity. But it also drives direct response and performance outcomes.

Strong brand ads deliver in both timeframes, whereas performance-only ads rarely achieve the same long-term impact.

System1 data backs this up: **92% of equity-building ads also performed strongly in the short term**, based on Star Ratings (long-term growth potential) and Spike Ratings (short-term sales potential).

Long-term winners drive short-term growth

The best equity-led advertising delivers immediate returns



Source: System1

Why TV makes other channels work harder

This full-funnel effect happens because television **lifts the efficiency** of paid search, digital, and direct mail.

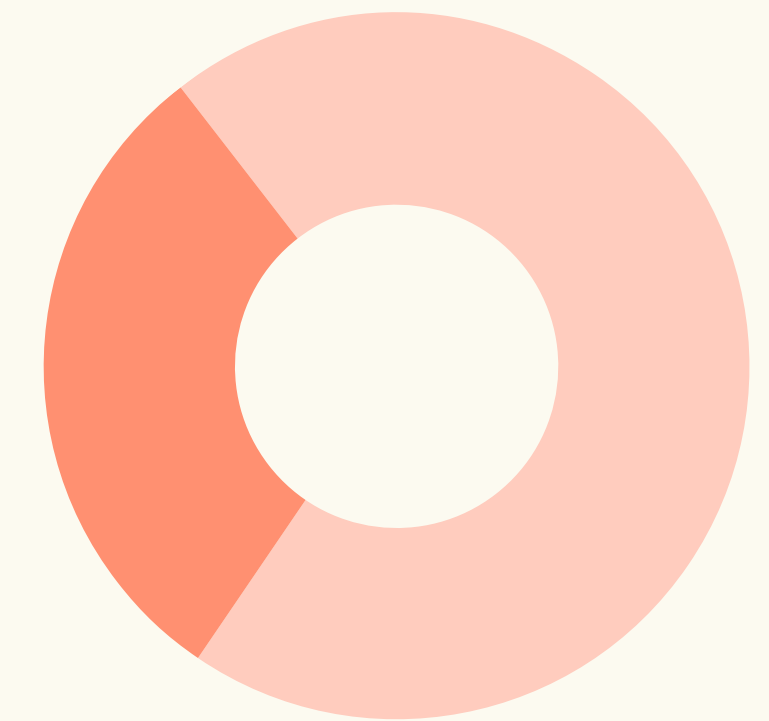
TV generates the demand that other channels convert: Emotion builds memory, and memory makes activation more efficient.

System1 data shows that **emotionally engaging TV ads make other channels more persuasive**, particularly direct mail and digital.

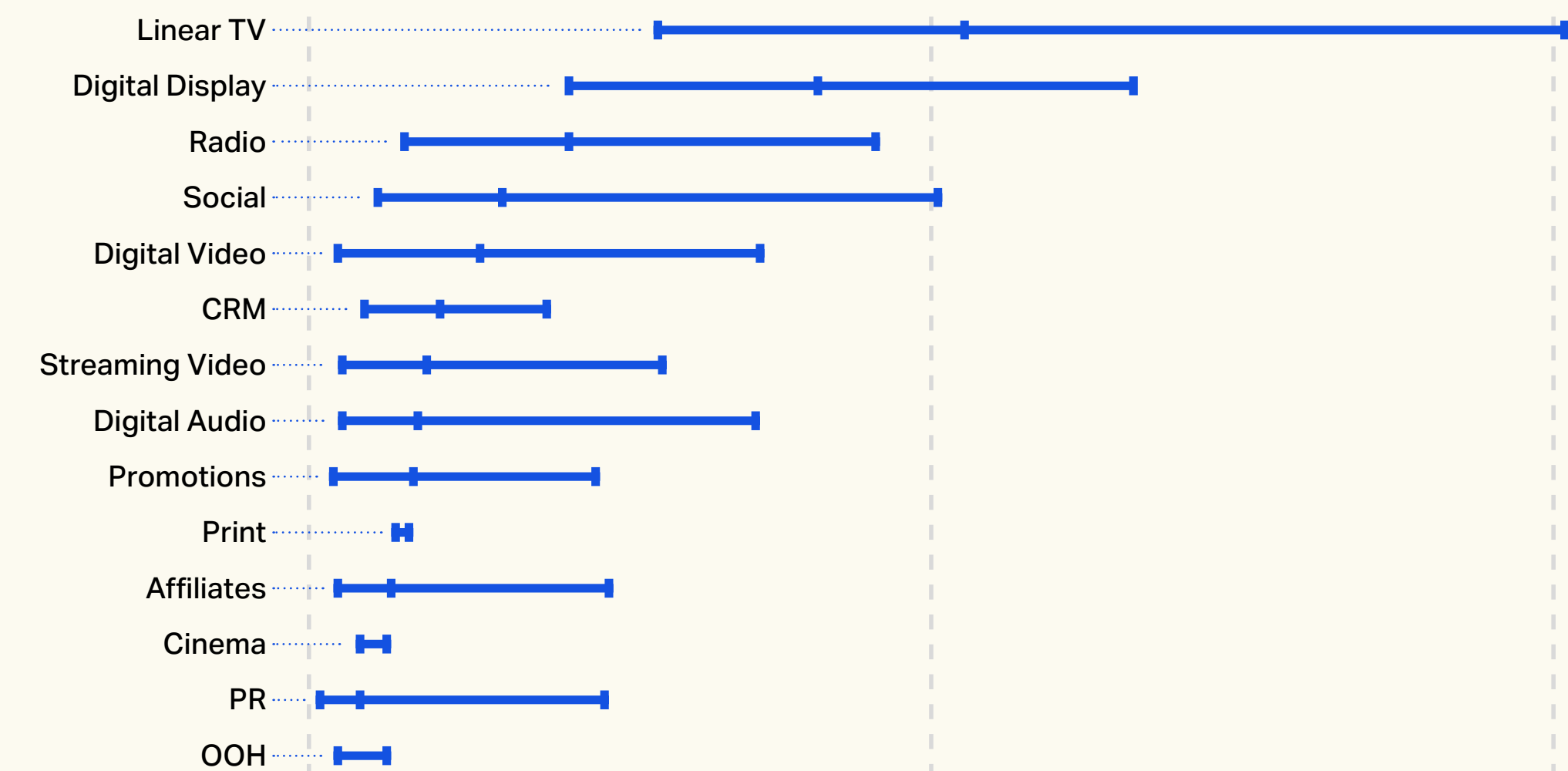
Analytic Partners found that 30% of search clicks are triggered by other media, underlining TV's role in driving response across the funnel.

30%

of search clicks are due to other marketing activities



Drivers of clicks %



Source: Analytic Partners ROI Genome

Why linear endures despite fragmentation

%

Linear TV remains the anchor of scaled media planning, **valued for its reach, live content and predictable scheduling**; even as connected TV offers growing flexibility and precision.

However, WARC Media analysis suggests that the **majority of incremental video spend is going to social and video platforms** including YouTube, not CTV.

Meanwhile, marketers and agencies are still grappling with fragmented CTV measurement and infrastructure, **reinforcing linear's role in cross-platform strategies.**

The industry still needs more standardized, robust measurement across all forms of TV.

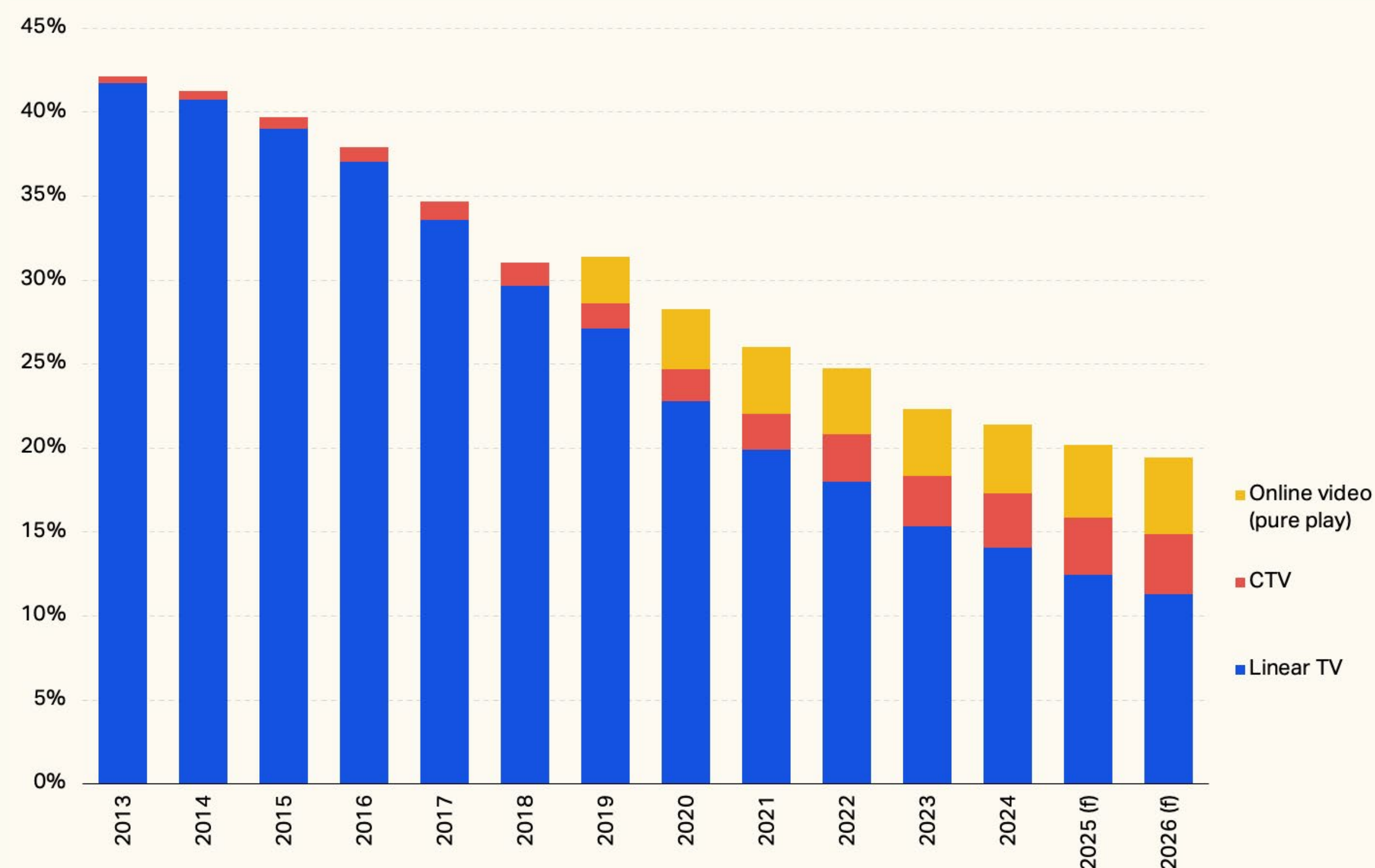
Denise Ocasio

Executive Director, Investment at Mindshare
(WPP Media) (Global Ad Trends)



Global, TV advertising investment

Percent share of total worldwide ad investment



Note: Online video includes ad spend with YouTube but excludes social video. 2025 and 2026 data are WARC forecasts.

Source: WARC Media

Chart: Global Ad Trends Sep 2025 pp12

How to make TV work harder

The most effective advertisers approach TV as more than just a media buy.

From how budget is allocated to how creative is designed, the best campaigns share common practices that maximize both short- and long-term impact.

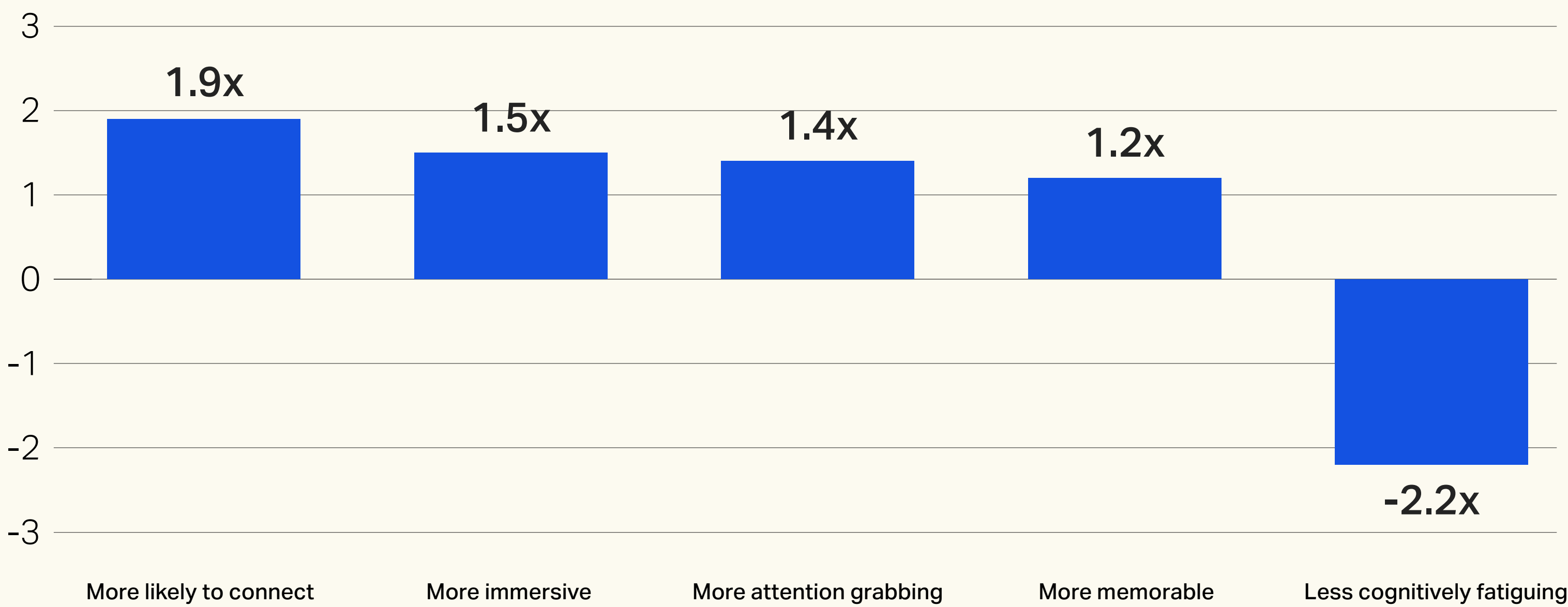
TV as the anchor in omnichannel plans

Omnichannel planning consistently outperforms siloed campaigns.

When television is integrated with other media, attention, recall and persuasion all rise. **The best results come when TV anchors an integrated plan**, rather than running in parallel.

Research from The Trade Desk shows that omnichannel campaigns deliver **1.5x higher persuasion and generate 2.2x less audience fatigue** compared with disconnected campaigns.

Connected omnichannel campaigns score higher against campaigns metrics



Note: Data from The Trade Desk Intelligence and PA Consulting, The Untapped Opportunity of Omnichannel, October 2024. The study includes quantitative surveys (in the US, UK and Germany), ethnographic media diary (in the US, UK, Germany), and controlled tests (in the US, the UK).
SOURCE: The Trade Desk

Balancing brand and performance investment

The best-performing advertisers allocate between 30–70% of spend to brand building.

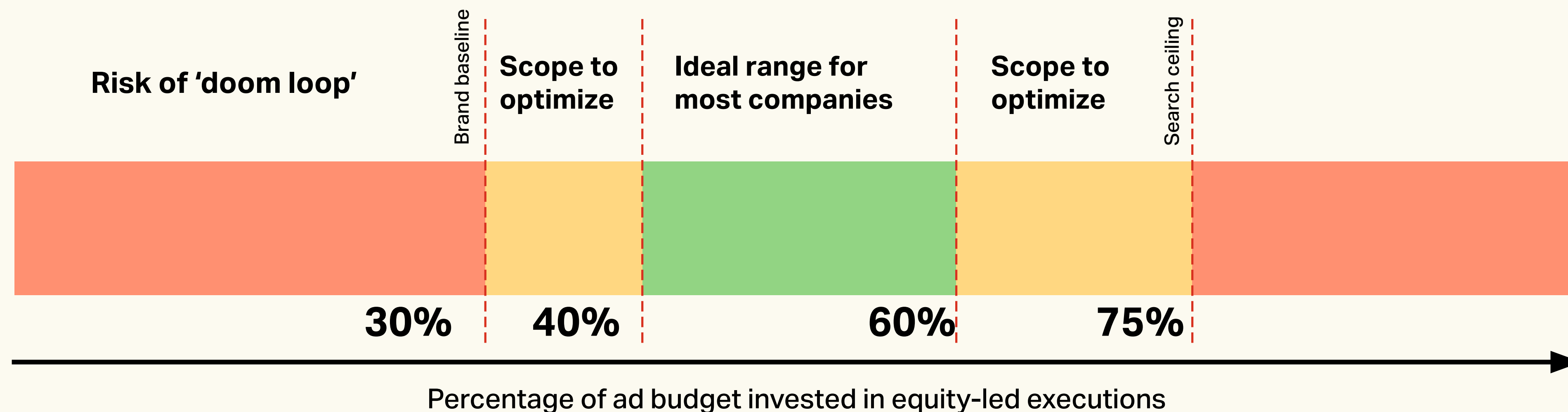
Equity-driven work lays the foundation for performance channels to succeed, **ensuring both current and future revenue growth.**

But **brand building only works at scale.** Campaigns must be seen by a broad range of potential future buyers as well as current in-market customers.

Analytic Partners' ROI Genome work confirms this:

1. **At least three in 10 ad dollars** should go toward equity-led advertising.
2. The most impactful advertisers dedicate **50% or more of their budgets to brand...** and often invest even higher shares.

The brand investment spectrum



Timeframe matters

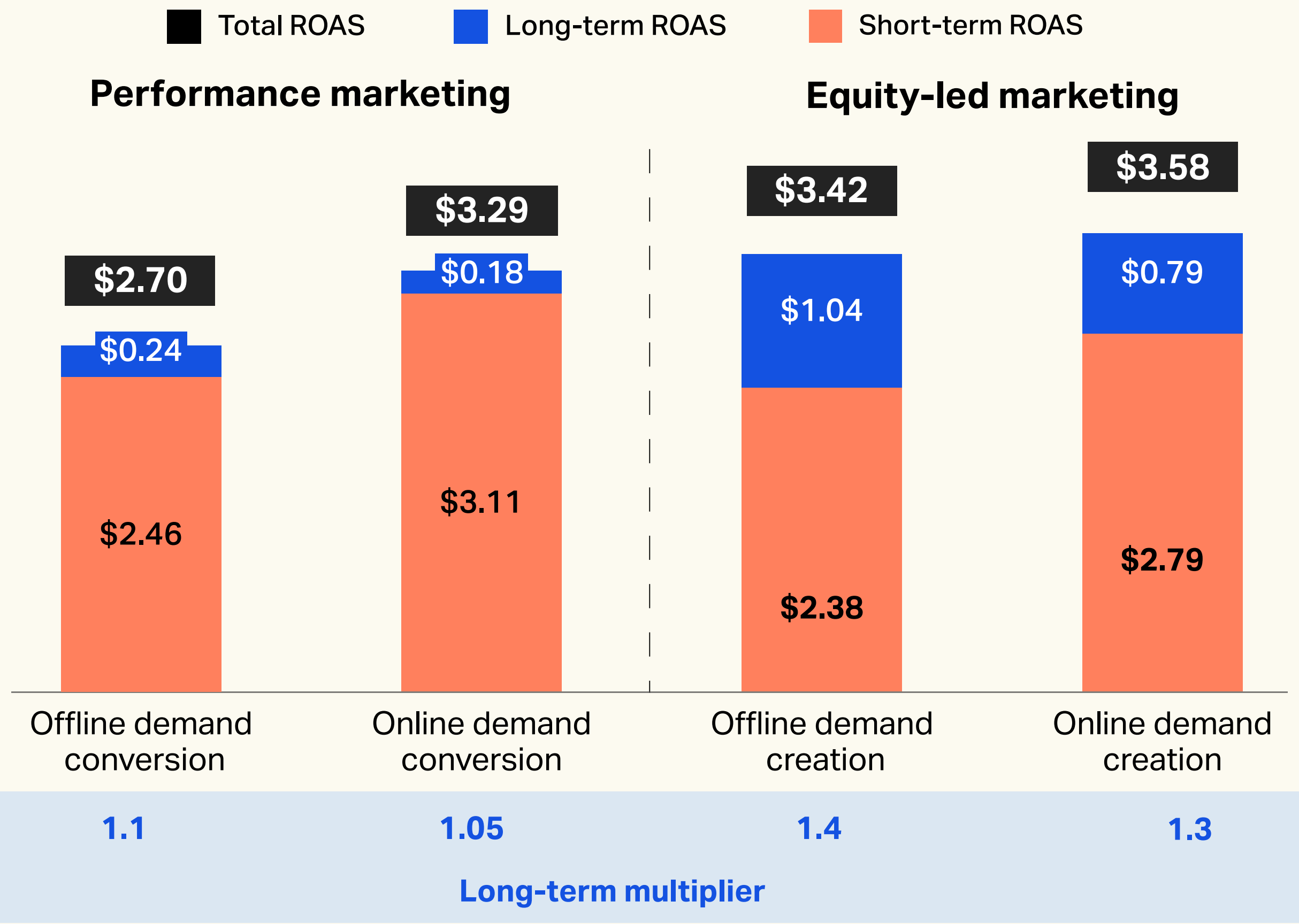
Equity takes time to build, but it pays off more in the long run.

Brand building impacts both current and future buyers, with effects that compound over time.

Research from [BERA.ai](#) found that equity building delivers a **higher return on spend than performance marketing** across both online and offline channels.

The full value emerges over time, as brand investment influences future buyers as well as current ones.

ROAS over time: Brand vs. performance



Long-term multiplier = Total ROAS ÷ Short-term ROAS

Source: BERA.ai

Creativity is a growth multiplier

Dull ads waste budget, while emotional work pays back.

Planning for emotional resonance improves both effectiveness and efficiency. In television, creative equality alone drives **37% of sales lift**.

A study by System1, Peter Field, and Adam Morgan analyzed US consumer reactions to 57,000 TV ads to calculate the “cost of dull.”

- Stronger emotional responses correlated with market share growth.
- Neutral responses (used as a proxy for dullness) were linked to weaker market share outcomes.
- To match the share growth of top-performing ads, dull ads would require **an extra \$189 billion in spend**.

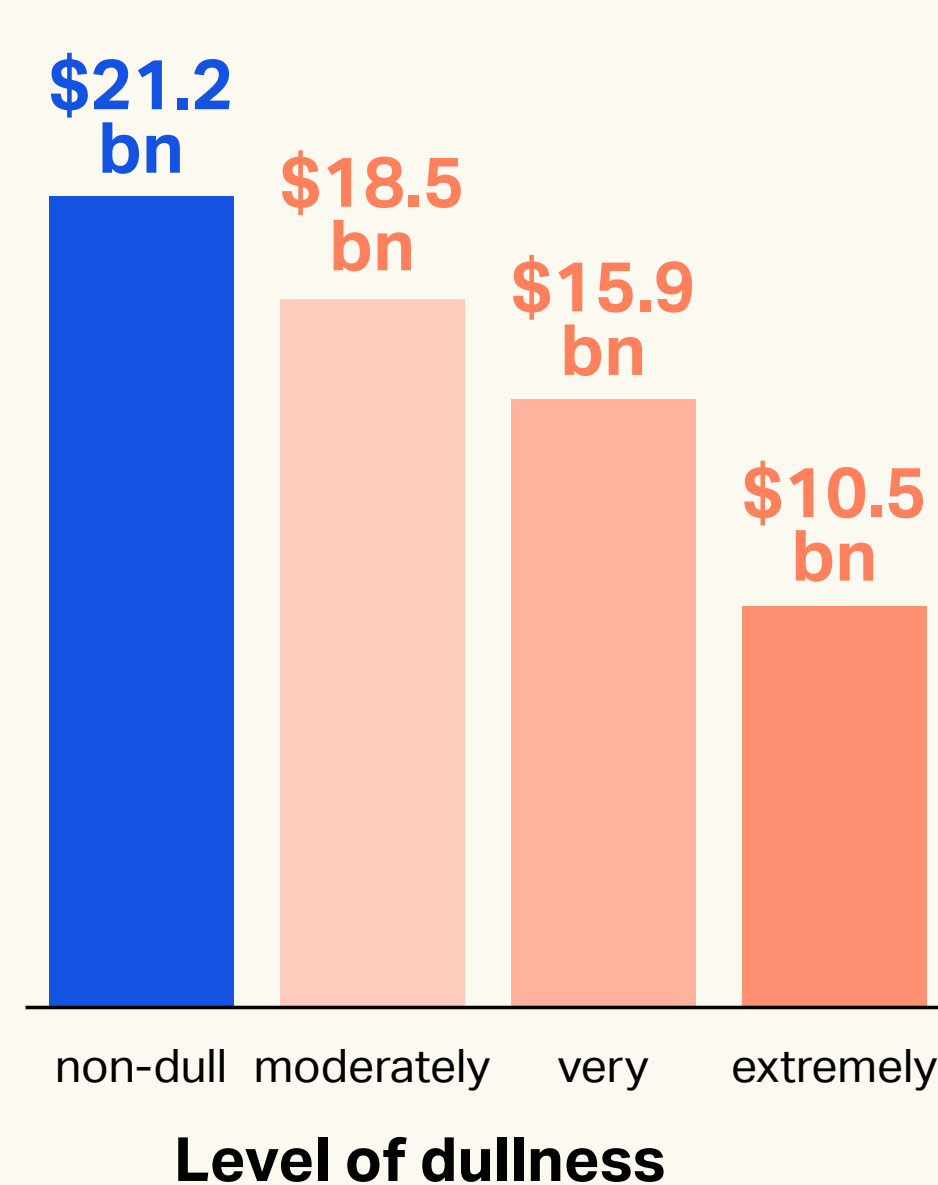
Remarkable TV creative requires a different playbook than the one that’s been used for decades. One that combines proven creative principles with new technologies.

Angela Voss
CEO, Marketing Architects

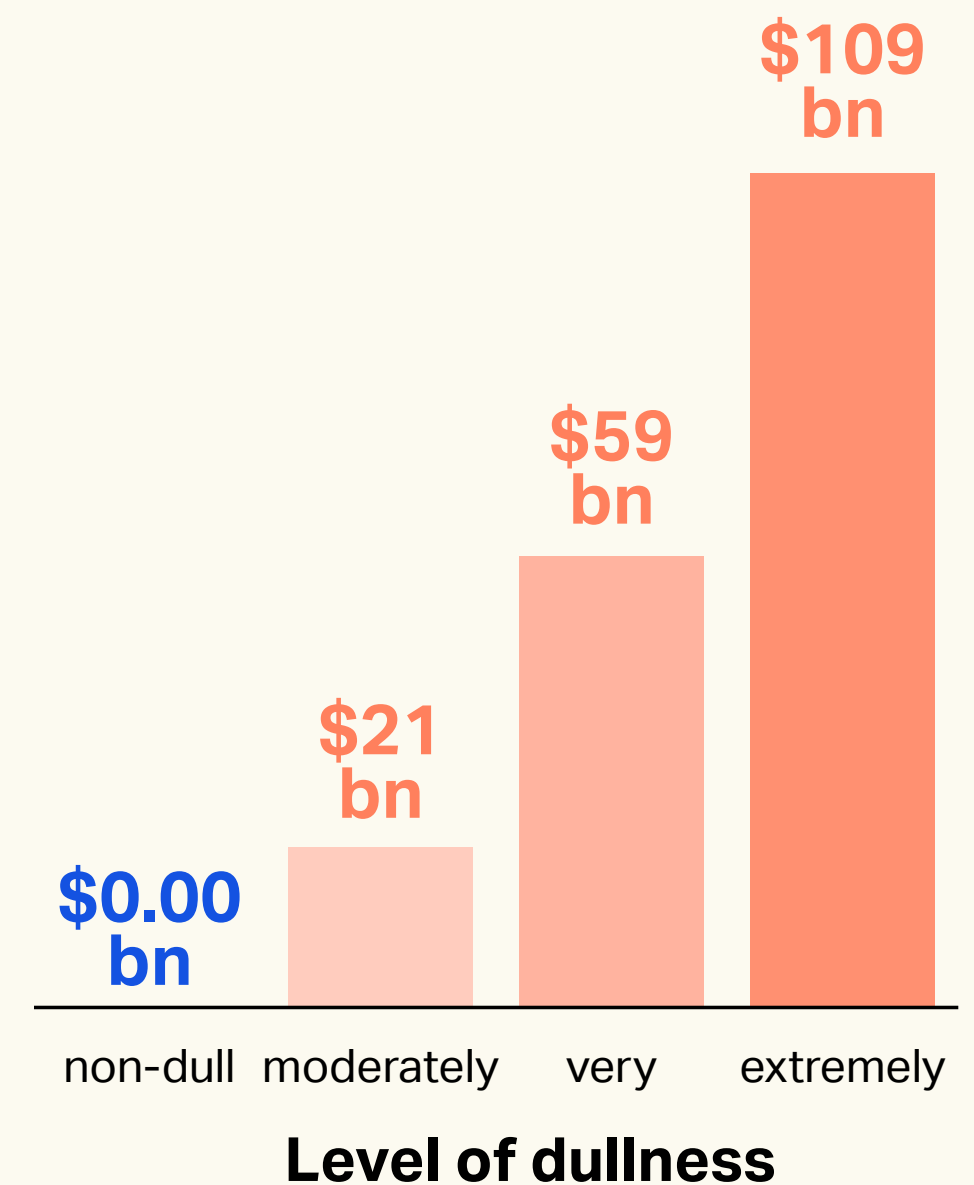


The cost of dull TV advertising to US brands

Estimated TV ad spend for each category of ad



Extra spend needed to match non-dull ads market share growth



Notes: To calculate dullness, System1’s database was split into equal quartiles based on levels of neutrality among ad testing respondents: extremely dull (average 62% neutrality); very dull (51%); moderately dull (44%); non-dull (39%).

Average estimated TV ad spend for all (n>55,000) US TV ads tested by System1 since 2017 was based on ad spend projections from Vivvix extrapolated to total US TV ad expenditure in 2022.

Extra spend over current levels estimates additional expenditure needed by dull ads to match forecast growth potential of non-dull ads. Estimates are based on annualized market share gains for brands with a 15% share of voice and 5% market share.

Source: System1/eatbigfish/Peter Field

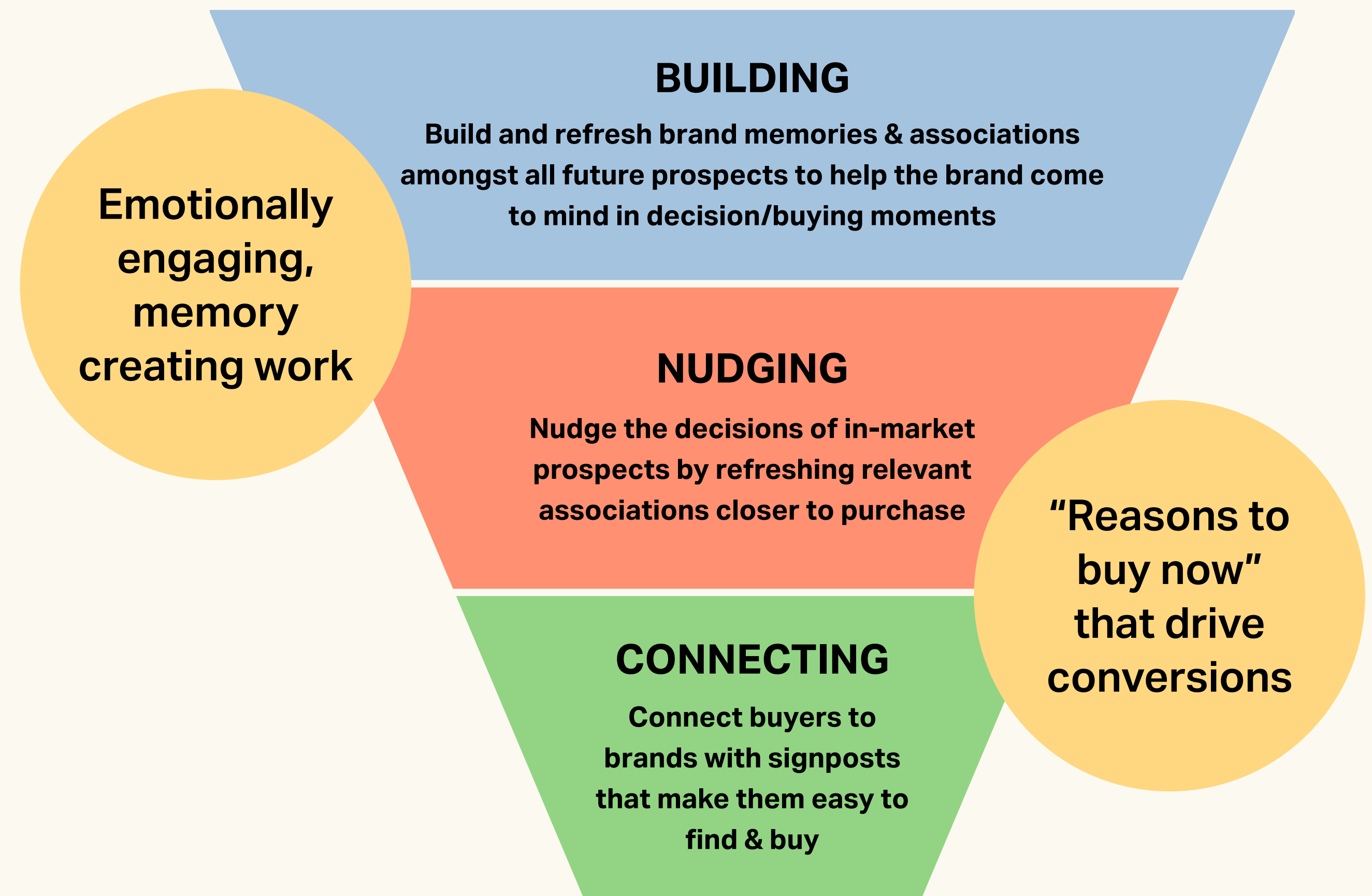
Build platforms, not campaigns

Great brands don't just tell one story; they build worlds.

Television is most powerful when it's part of a **repeatable, evolving platform** that audiences can return to and grow over time.

Take a platform approach: A creative foundation that can flex across executions, from emotionally engaging, memory-building work through to tactical "reasons to buy now" that drive conversion.

Optimize platforms via messaging types



In summary

1 Why this matters now

Under pressure to deliver quick wins, many advertisers are leaning into tactics that erode long-term brand strength.

With media fragmented and measurement models distorting what works, it's never been more urgent to reframe how we plan and value TV.

2 What TV really delivers

TV delivers more than broad awareness: It creates emotional connections that drive memory, trust, and long-term preference.

At the same time, it boosts the performance of other channels, nudges consumers to act, and delivers measurable sales impact in the short term.

3 How to make TV work harder

To make TV work harder, marketers should plan it as a platform instead of a one-off campaign.

By combining emotionally resonant creative with clear calls to action, TV drives long-term brand value and delivers short-term results, maximizing the impact of every execution.

Who we are

WARC

The global authority on marketing effectiveness

For nearly 40 years, WARC has been powering the marketing segment by providing rigorous and unbiased evidence, expertise and guidance to make marketers more effective. Across several platforms – WARC Strategy, WARC Creative, WARC Media, – its services include 100,000+ case studies, best practice guides, research papers, special reports, advertising trend data, news and opinion articles, as well as awards, events and advisory services.

WARC is part of LIONS. Want to get access to WARC?
Get a [demo](#)

LIONS Advisory

LIONS Advisory helps ambitious CMOs establish marketing as a business growth engine – fueling cultures of creative effectiveness with the industry’s leading consultants.

The LIONS Advisory team is made up of strategists with expertise in activating creative transformation based across EMEA, the Americas and APAC. We establish deep and enduring partnerships with marketers at some of the world’s largest, most influential and most successful marketing organizations.

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About Marketing Architects

Marketing Architects is an All-Inclusive TV agency that rebuilt the traditional agency model to help brands drive profitable growth.

Founded in Minneapolis, Marketing Architects has spent nearly 30 years building homegrown technology to solve TV’s pricing, measurement, and scale challenges.

Learn more at marketingarchitects.com.

