

# THE LOWER FUNNEL POWER OF TV

HOW TV & BVOD ADVERTISING LEVERAGES BRAND SUCCESS

Guido Modenbach, March 12, 2026

# TV IS THE MOST POWERFUL DRIVER FOR AD SUCCESS, AS IT DELIVERS ON **BOTH SIDES** OF THE FUNNEL

1.

## **BUILDING MENTAL AVAILABILITY**

TV & BVOD establish brands in peoples' memories and link relevant associations with the brand.

**COMMUNICATIVE  
AD PERFORMANCE**

&

2.

## **ACTIVATION**

Because of its high reach, TV & BVOD secure exposure to consumers for whom a product or service is relevant at the moment of the ad contact.

**SHORT-TERM  
SALES EFFECTS**

**TV BUILDS BRAND-RELEVANT MEMORIES AND AT THE SAME TIME  
ACTIVATES PEOPLE WHO ARE CURRENTLY "IN THE MARKET"**

# WHEN EXACTLY ARE CONSUMERS 'IN THE MARKET'?

EXAMPLE OF A FINANCIAL SERVICE PRODUCT WITH A LIFECYCLE OF 5 YEARS

## 95-5 RULE

At any one time, only about **5%** of potential consumers are actively in the market to buy, while the remaining **95%** are not looking to purchase.

% IN THE MARKET / YEAR



% IN THE MARKET / QUARTER



“To grow a brand, you need to advertise to people who aren’t in the market now, so that when they do enter the market your brand is one they are familiar with.”

John Dawes

**5% IS CURRENTLY IN THE MARKET AND 95% IS IN THE FUTURE: THAT IS WHY THE (ADVERTISING) POWER OF TV IN THE UPPER AND LOWER FUNNEL IS SO IMPORTANT**

## BRAND BUILDING

**95%**

**COMMUNICATIVE AD  
PERFORMANCE**

% IN THE MARKET / YEAR



% IN THE MARKET / QUARTER



## ACTIVATION

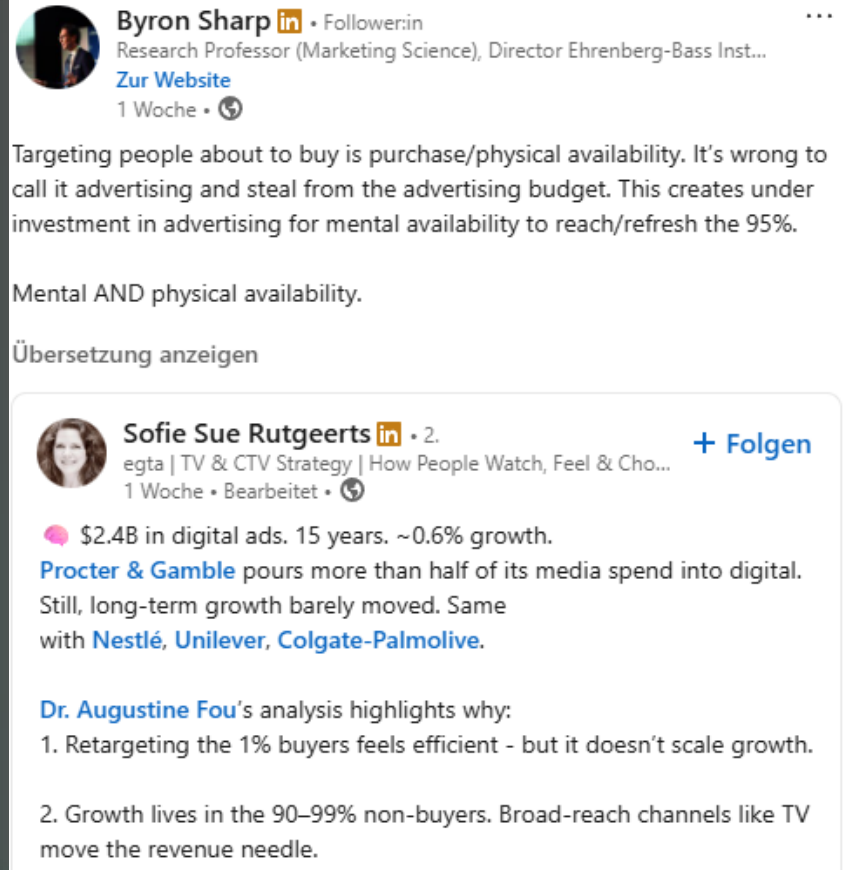
**5%**



**SALES EFFECTS**

# TARGETING PEOPLE ABOUT TO BUY IS NOT ADVERTISING

„ADVERTISING WORKS LARGELY BY REFRESHING, AND OCCASIONALLY BUILDING, MEMORY STRUCTURES\*.

TARGETING PEOPLE TO BUY IS PHYSICAL AVAILABILITY.“





**Byron Sharp**  • Follower in  
Research Professor (Marketing Science), Director Ehrenberg-Bass Inst...  
[Zur Website](#)  
1 Woche • 

Targeting people about to buy is purchase/physical availability. It's wrong to call it advertising and steal from the advertising budget. This creates under investment in advertising for mental availability to reach/refresh the 95%.

Mental AND physical availability.

Übersetzung anzeigen

**Sofie Sue Rutgeerts**  • 2. [+ Folgen](#)  
egta | TV & CTV Strategy | How People Watch, Feel & Cho...  
1 Woche • Bearbeitet • 

💡 \$2.4B in digital ads. 15 years. ~0.6% growth.  
**Procter & Gamble** pours more than half of its media spend into digital. Still, long-term growth barely moved. Same with **Nestlé**, **Unilever**, **Colgate-Palmolive**.

**Dr. Augustine Fou's** analysis highlights why:

1. Retargeting the 1% buyers feels efficient - but it doesn't scale growth.
2. Growth lives in the 90–99% non-buyers. Broad-reach channels like TV move the revenue needle.



Prof. Byron Sharp

Director  
Ehrenberg Bass Institute  
for Marketing Science

# MARKET-BASED BRAND ASSETS: MENTAL & PHYSICAL AVAILABILITY

FOR BRANDS TO GROW, YOU MUST MAKE THEM  
AS EASY TO BUY AS POSSIBLE

## MENTAL AVAILABILITY

Propensity of a brand to be noticed or come to mind for individuals in buying or consumption situations.

## PHYSICAL AVAILABILITY

How easily or conveniently the product or service is available in potential buying situations.

„Brands even in complex, high involvement, intangible categories, compete largely for mental and physical availability. Growth depends on building these two market-based assets at a faster rate than competitors.“

Jenni Romaniuk  
*International Director, Ehrenberg-Bass Institute*



# HOW TO MEASURE MENTAL AVAILABILITY

## INCREASE IN MENTAL AVAILABILITY MEASURED ALONG 3 NEW KPI:

- The brand is established in the memories of **more people** and is linked to associations (**associative penetration**).
- There are (on average) **more associations** linked to the brand in people's memories (**association rate**).
- The **proportion of associations** with the brand among all associations in a category increases (**mental market share**).

**MENTAL AVAILABILITY STUDIES ARE EXTREMELY VALUABLE.  
THEY PROVIDE DEEP INSIGHTS INTO CAMPAIGNS AND OPEN DOORS AT THE C-LEVEL.**

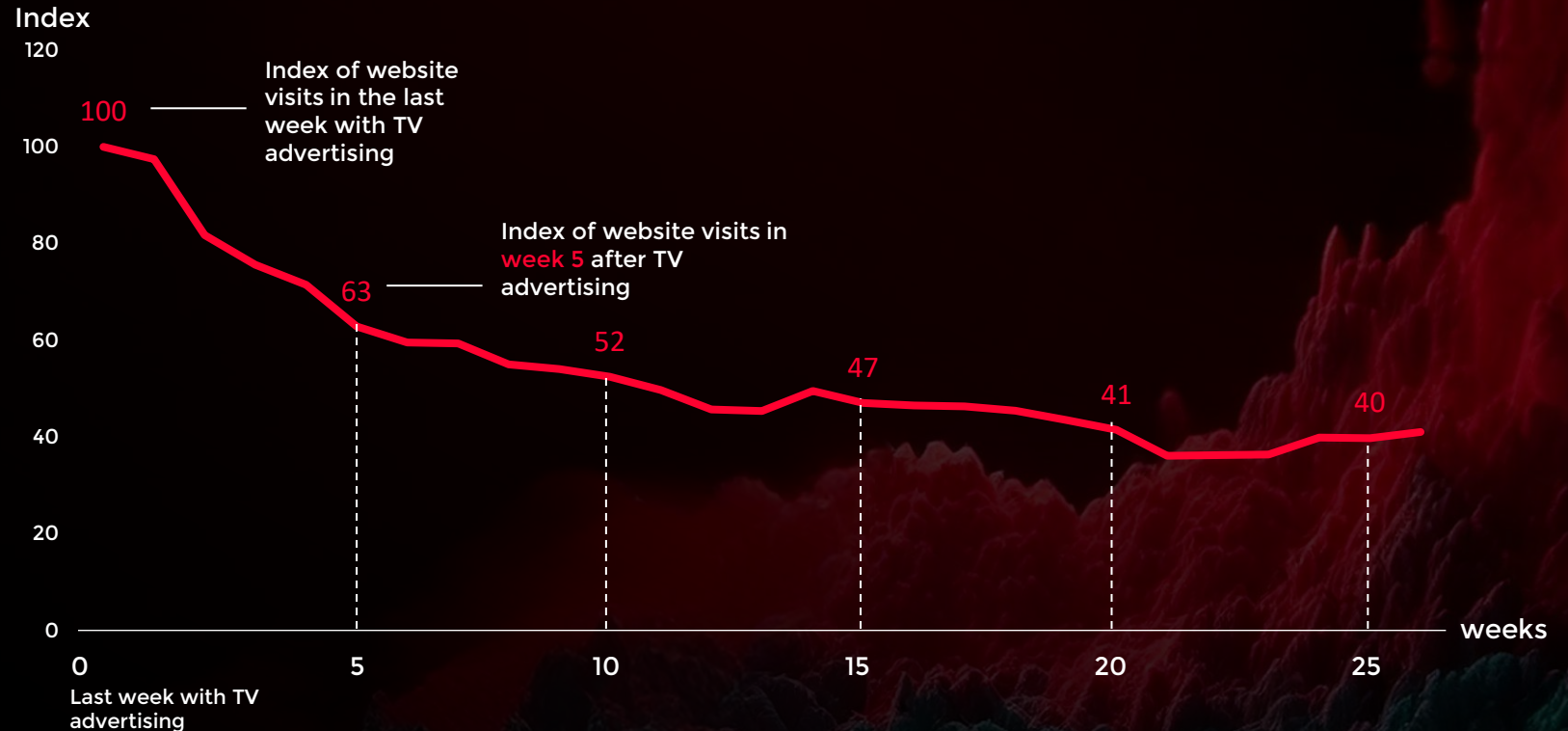
# WITHOUT TV, WEBSITE VISITS DROP OFF

ANALYSIS BASED ON 161 DOMAINS

MENTAL AVAILABILITY IS THE MOST RELEVANT OUTCOME OF TV ADVERTISING.

HOWEVER, THE LOWER FUNNEL EFFECT OF TV BECOMES EVIDENT WHEN YOU TRACK WEBSITE VISITS AND SEE WHAT HAPPENS WHEN TV IS REMOVED.

AVERAGE VISITS PER WEEK  
Index basis week = 100

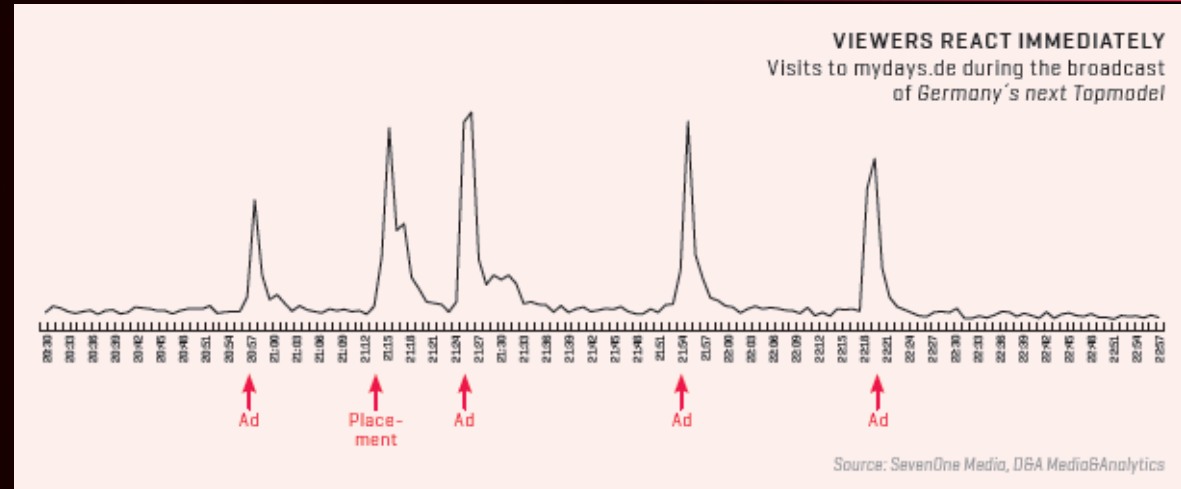


# A REAL-WORLD EXAMPLE PROVES THAT ADVERTISING DOESN'T FOLLOW THE AIDA (ATTENTION-INTEREST-DESIRE-ACTION) SEQUENCE

## ACTIVATION

Because of its high reach, TV & BVOD secure exposure to consumers for whom a product or service is relevant at the moment of the ad contact.

### SHORT-TERM SALES EFFECT



- **Personal relevance** drives those clicks
- The ads **remind** or **activate** consumers who are **in the market**
- **Broad Reach** secures activation across **large audiences**
- Hence, broad reach seems to be a **strong performance lever** in the lower funnel

# PERFORMANCE PLANNING AND REPORTING VIA MEDIALYTICS

## MEASURING TV ULTRA SHORT-TERM EFFECTS BASED ON A STRICT REQUIREMENT

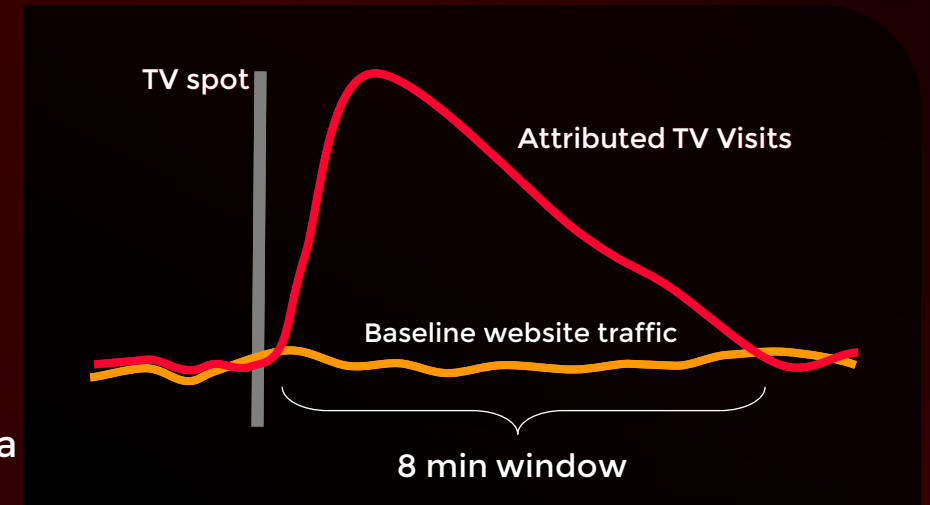
### MAIN PRINCIPALS OF MEDIALYTICS ANALYSES

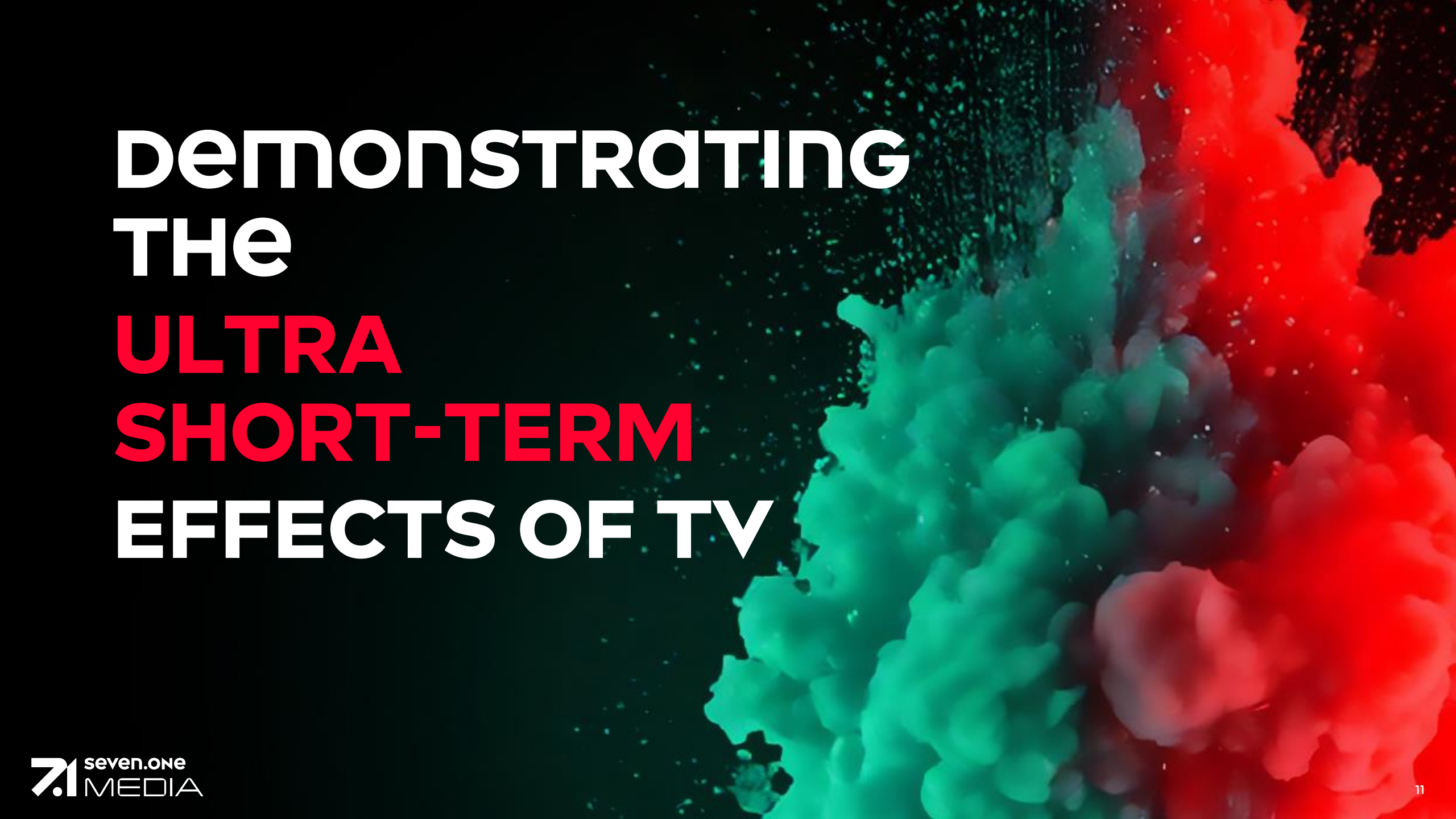
#### Traffic Baseline calculation to define “business as usual” without TV effect:

- Machine learning model based on historical traffic data for predictions of future traffic patterns
- Model learns continuously from new and previous data, baseline adapts continuously and could also reflect natural seasonal patterns

#### Real-Time Attribution to bridge the gap between the Big Screen and the Second Screen by identifying the immediate response:

- Every visitor in a 8-minute window after the starting time of a TV spot gets a certain probability, if the visit was triggered by the TV spot
- Incremental visits (device IDs) are flagged and tracked (according to the probability to be triggered by TV) with Google Analytics within the next 2 weeks after airing of the TV spot





# DEMONSTRATING THE ULTRA SHORT-TERM EFFECTS OF TV

# TV-ADVERTISING: STRAIGHT FROM THE BIG SCREEN TO YOUR CART

## REAL WORLD EXAMPLE

TV INDUCED PERFORMANCE KPIS



**2,7 MIO.**

MEDIA INVEST

**~ 600**

GRP



**~350.000**

TV TRIGGERED INCREMENTAL VISITS WITHIN 8 MINUTES

**~ 8 €**

COST-PER-VISIT



**~120.000**

TV TRIGGERED ORDERS\*

**~ 23 €**

COST-PER-ORDER



**9,2 MIO.**

TV TRIGGERED SHORT-TERM REVENUE\*

**~ 77€**

Ø-BASKET-VALUE

ULTRA-SHORT-TERM EFFECT

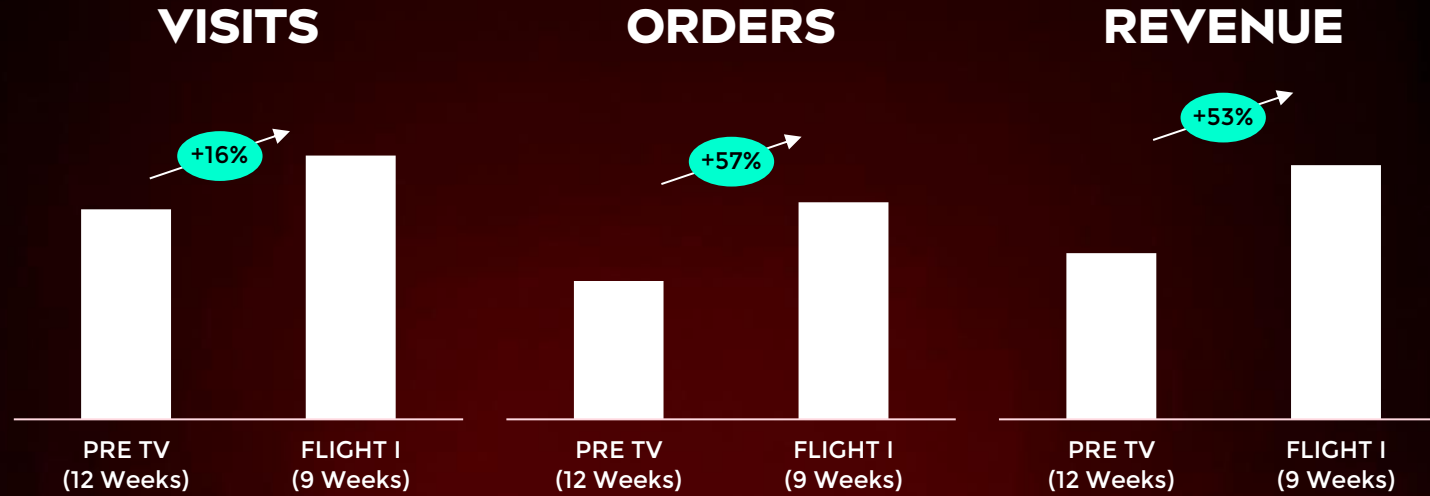


# THE „MID-TERM“ EFFECTS:

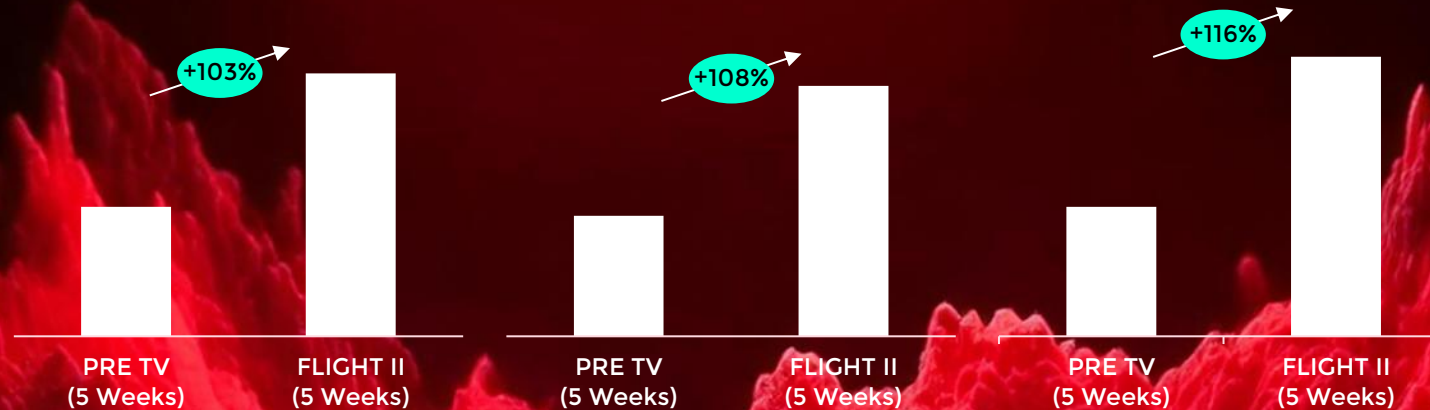
# SIGNIFICANT PERFORMANCE UPLIFT TV CAMPAIGN DRIVES MAJOR GROWTH IN VISITS, ORDERS, AND REVENUE

COMPARISON OF PERFORMANCE KPIs: TV CAMPAIGN PERIOD VS. PRE-PERIOD

**FLIGHT I**  
AVERAGE DAY



**FLIGHT II**  
AVERAGE DAY



**MEASURING OUTCOME FOR TV SHOULD FOCUS ON MENTAL AVAILABILITY  
HOWEVER, DUE TO ITS BROAD REACH TV IS ALSO A STRONG PERFORMANCE LEVER**

1.

**MENTAL AVAILABILITY**

**95%**

**&**

2.

**ACTIVATION**

**5%**

**THE ROLE OF TV IN THE LOWER FUNNEL IS UNDERESTIMATED IN THE MARKET**

**WITH MODERN MEASUREMENT WE CAN SHOW  
THE EVIDENCE FOR THE LOWER FUNNEL POWER OF TV**

A large, vibrant splash of red and teal ink in a dark room, with the text 'THANK YOU!' overlaid in white. The ink splash is the central focus, with red on the left and teal on the right. The floor is a grid of dark tiles, reflecting the colors of the ink. The background is dark, making the colors of the ink stand out.

**THANK YOU!**