TV Now and Next

thinkbox

Chapter 1:
The viewing landscape

Anthony Jones, Head of Research, Thinkbox

Nailah Uddin, Research Manager, Thinkbox

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What we will cover today

What’s been happening to video viewing levels?

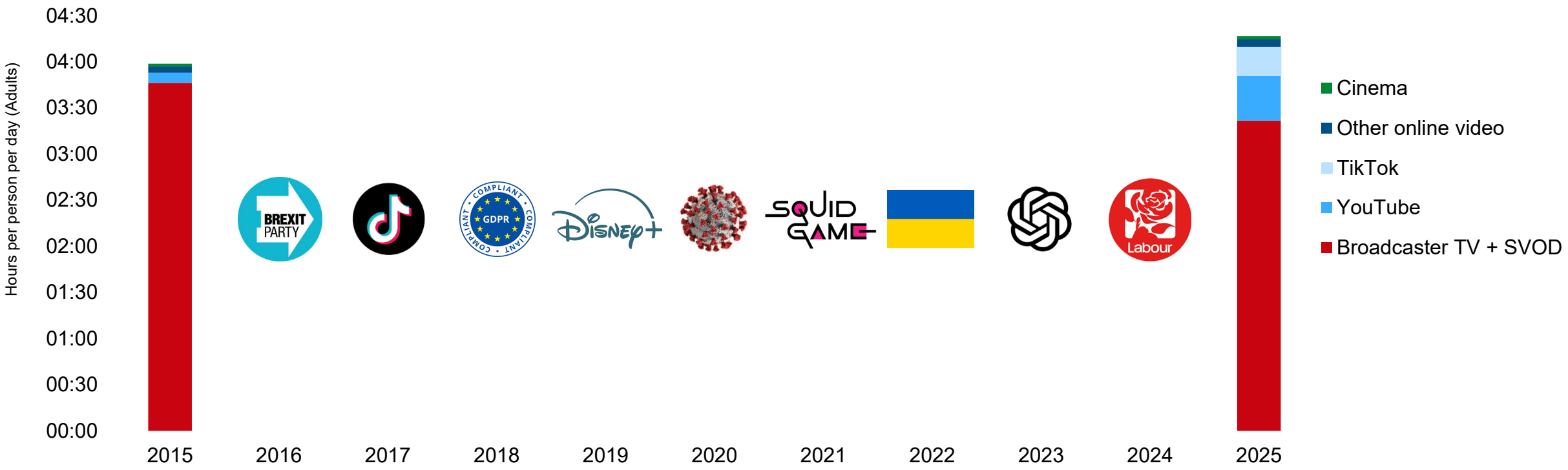
What video content are people consuming?

What does this mean for exposure to advertising?

A decade of disruption

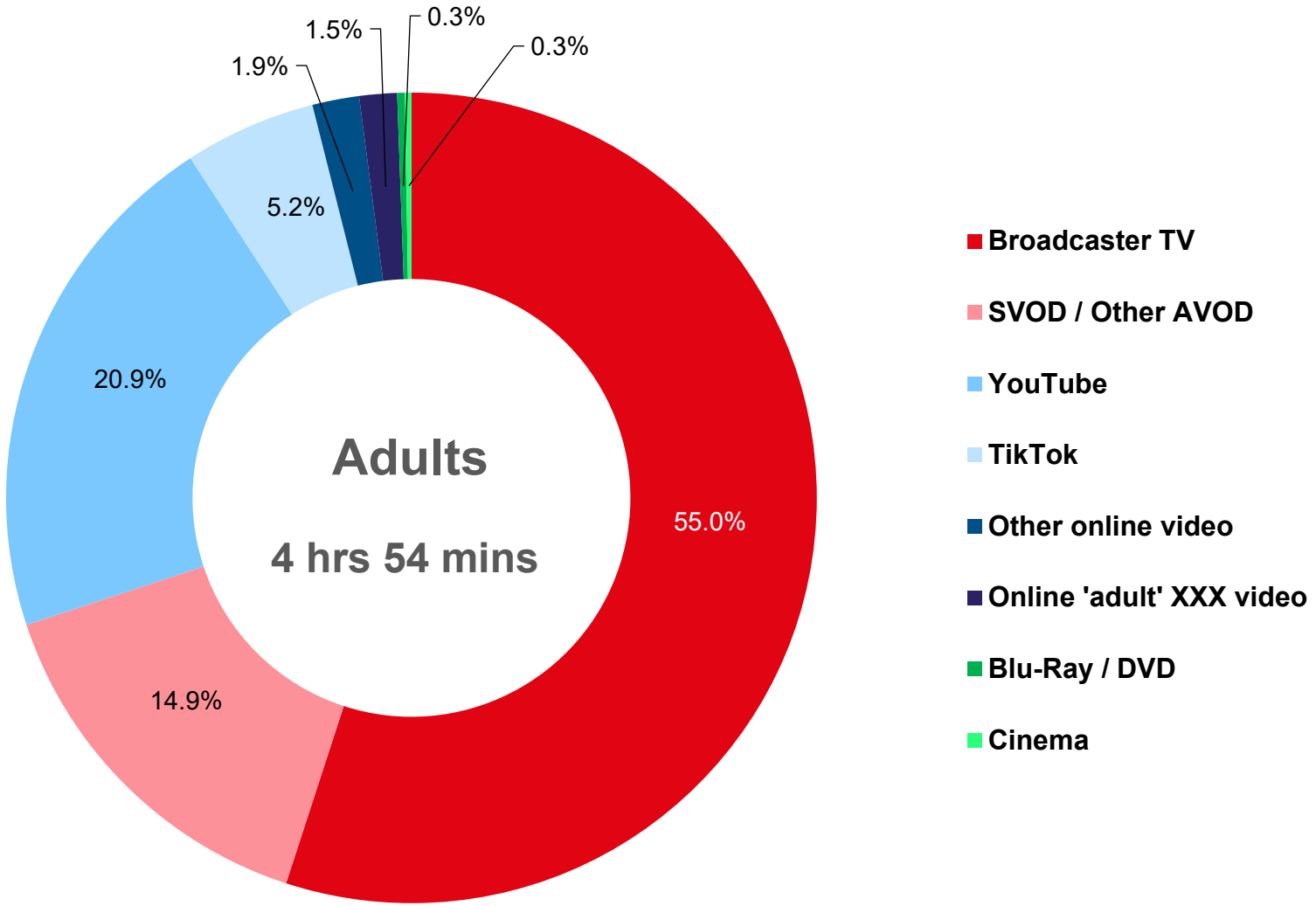
Source: IPA TouchPoints, Adults 15+

A decade of disruption and TV remains dominant



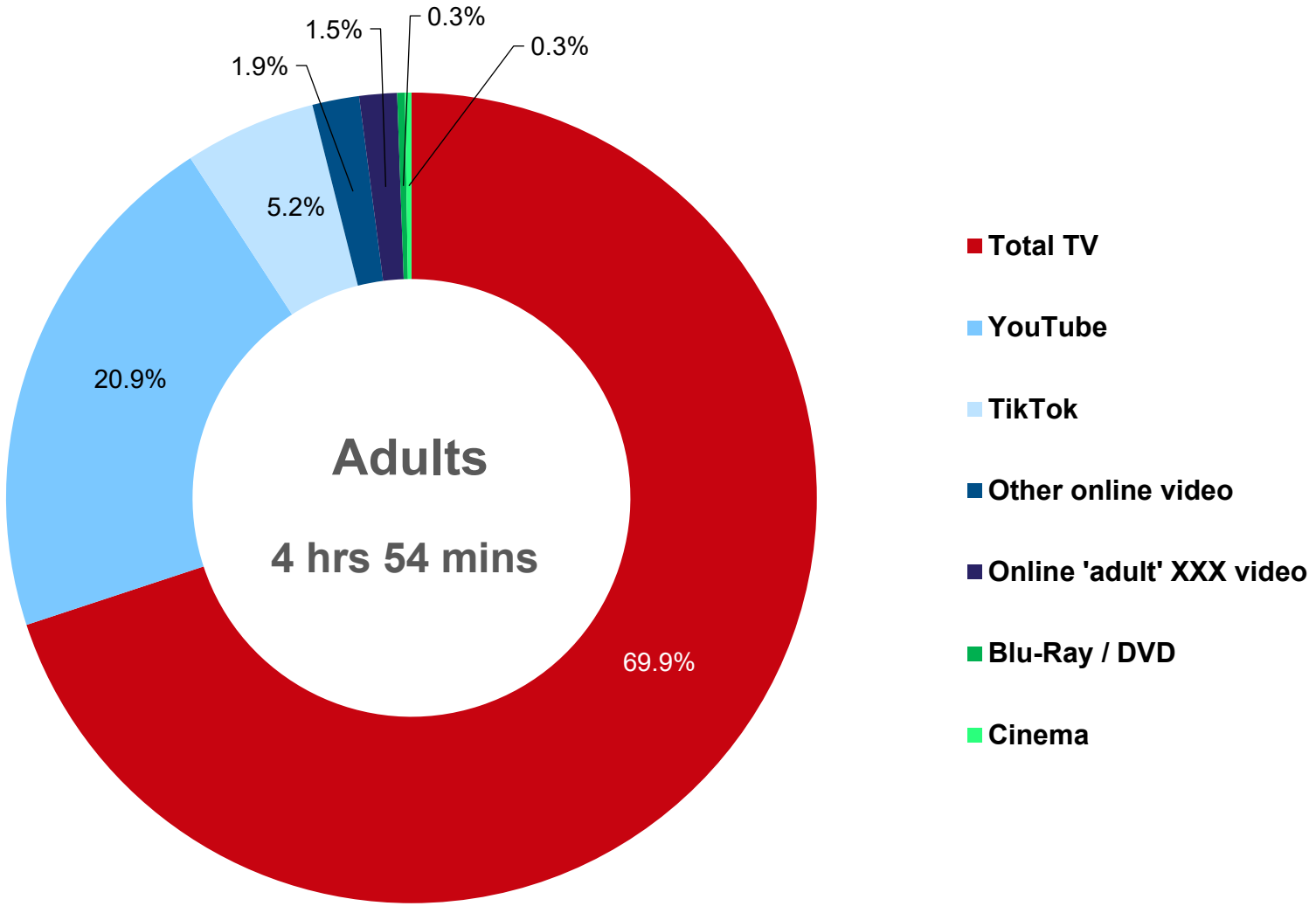
Source: IPA TouchPoints, Adults 15+

20% of the day was spent consuming video content in 2025



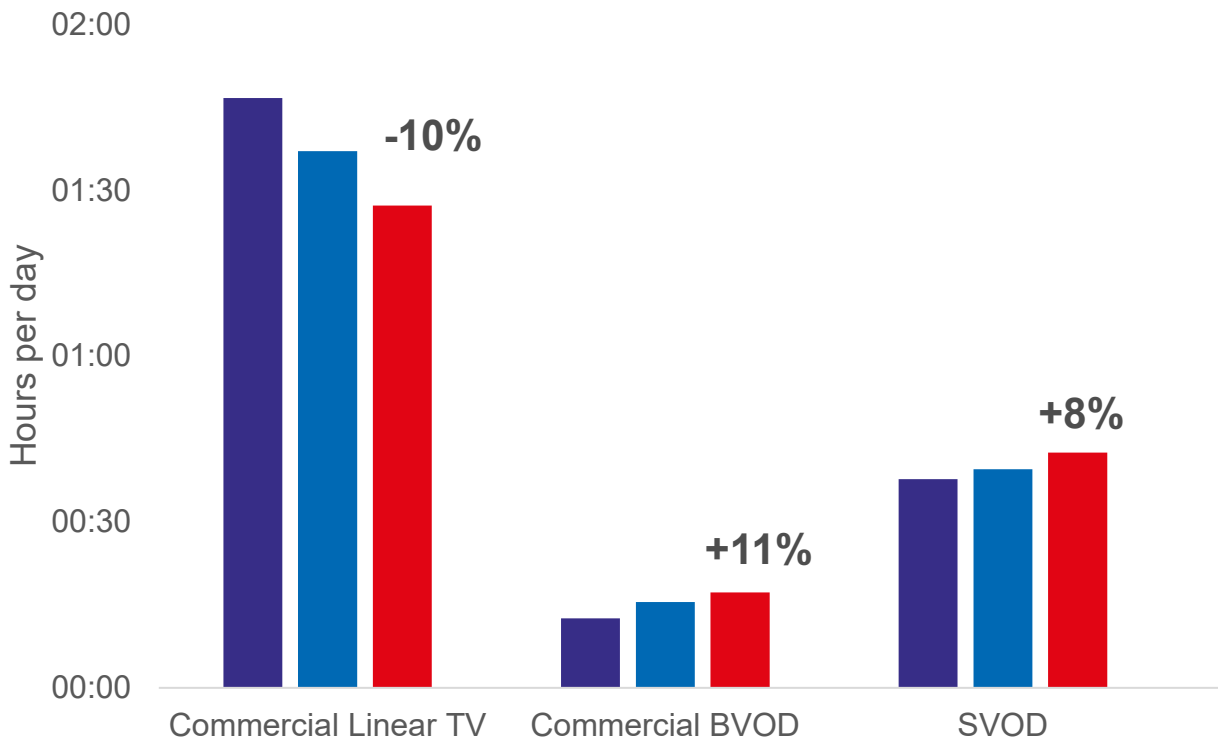
Source: 2025, Barb / IPA TouchPoints 2025 / Pornhub / UK Cinema Association / Ipsos Iris

Total TV accounted for 70% of total video viewing in 2025



Source: 2025, Barb / IPA TouchPoints 2025 / Pornhub / UK Cinema Association / Ipsos Iris
Total TV = Broadcaster TV, SVODs & AVODs

The growth of VOD continues

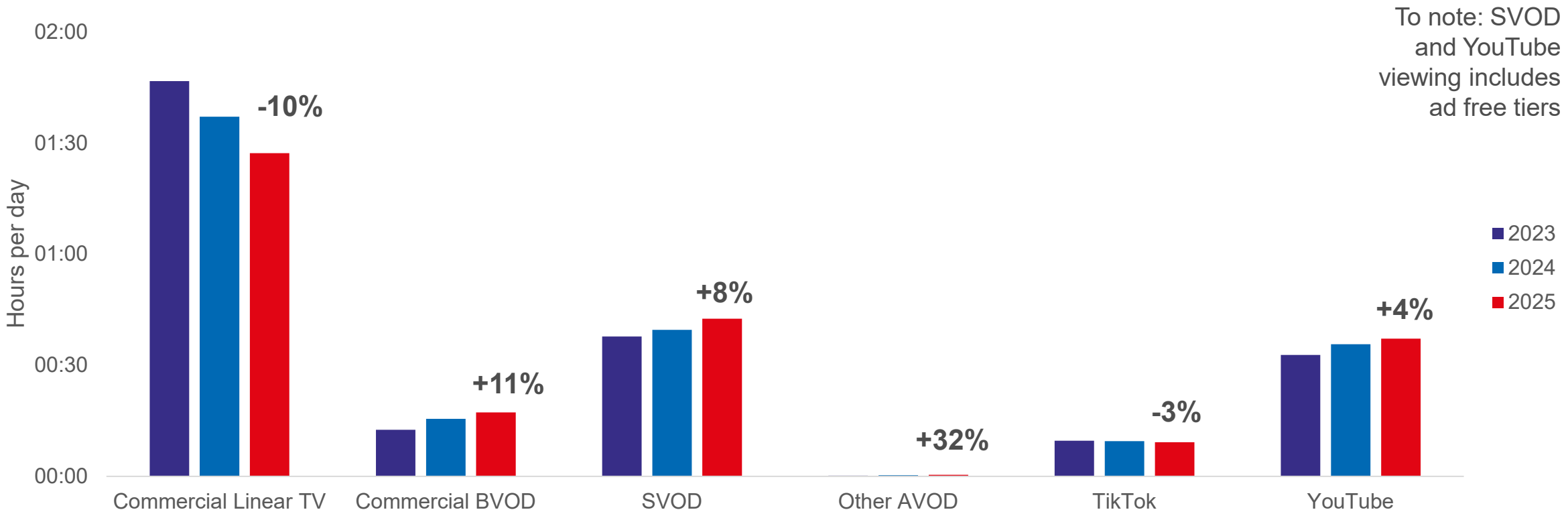


To note: SVOD and YouTube viewing includes ad free tiers

2023
2024
2025

Source: Barb, In home viewing only. All devices, Adults 16+, Total commercial linear TV and BVOD.
% difference based on 25 vs. 24

Little change across the other video areas



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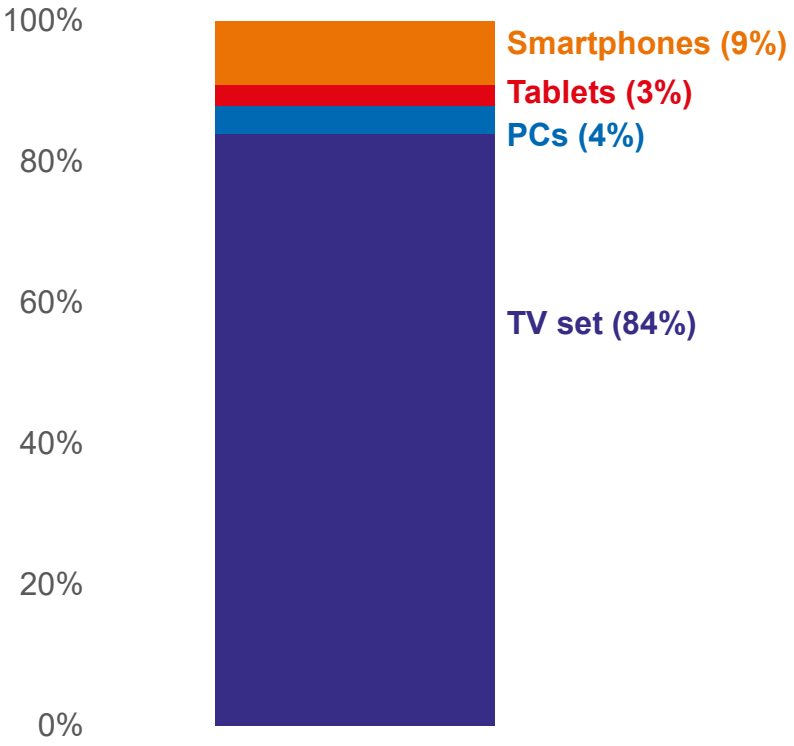
% difference based on 25 vs. 24

TV sets are the heart of entertainment



Source: Barb, In home viewing only. 2025. Adults 16+. Online Multiple Screens Network, Total Identified Viewing

TV attracts huge audiences

Rank	Channel Group	Programme Title	Average Audience (m)
6	Netflix	Harlen Coben's Missing You	9.0
7	Netflix	Dept. Q	8.8
8	Channel 4	The Great British Bake Off	8.6
9	ITV	Vera	8.5
10	ITV	Unforgotten	8.4

Rank	Channel Group	Programme Title	Average Audience (m)
11	ITV	The 1% Club	8.4
12	BBC	Call the Midwife	8.2
13	BBC	Race Across the World	8.2
14	BBC	Strictly Come Dancing	7.9
15	BBC	Silent Witness	7.9
16	BBC	Death in Paradise	7.9
17	ITV	Playing Nice	7.8
18	Netflix	Wednesday	7.8
19	BBC	Celebrity Race Across the World	7.5
20	Amazon	LOL: Last One Laughing UK	7.5

Source: Barb, 2025, Adults. TV set viewing. Top performing episode (excludes one-offs, kids, films and sports).

Viewers don’t just crave new, they crave known

Rank	Channel Group	Programme Title	Average Audience (m)	Series
1	Netflix	Adolescence	15.2	1
2	BBC	The Celebrity Traitors	13.9	1
3	BBC	The Traitors	9.9	3
4	Amazon	Clarkson's Farm	9.1	4
5	ITV	I'm a Celebrity... Get Me Out of Here!	9.1	25
6	Netflix	Harlen Coben's Missing You	9.0	1
7	Netflix	Dept. Q	8.8	1
8	Channel 4	The Great British Bake Off	8.6	16
9	ITV	Vera	8.5	14
10	ITV	Unforgotten	8.4	6

Rank	Channel Group	Programme Title	Average Audience (m)	Series
11	ITV	The 1% Club	8.4	4
12	BBC	Call the Midwife	8.2	14
13	BBC	Race Across the World	8.2	5
14	BBC	Strictly Come Dancing	7.9	23
15	BBC	Silent Witness	7.9	28
16	BBC	Death in Paradise	7.9	14
17	ITV	Playing Nice	7.8	1
18	Netflix	Wednesday	7.8	2
19	BBC	Celebrity Race Across the World	7.5	3
20	Amazon	LOL: Last One Laughing UK	7.5	1

Source: Barb, 2025, Adults. TV set viewing. Top performing episode (excludes one-offs, kids, films and sports).

British made and loved

Rank	Channel Group	Programme Title	Average Audience (m)	Series	Origin
1	Netflix	Adolescence	15.2	1	UK
2	BBC	The Celebrity Traitors	13.9	1	UK
3	BBC	The Traitors	9.9	3	UK
4	Amazon	Clarkson's Farm	9.1	4	UK
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13	BBC	Race Across the World	8.2	5	UK
14	BBC	Strictly Come Dancing	7.9	23	UK
15	BBC	Silent Witness	7.9	28	UK
16	BBC	Death in Paradise	7.9	14	UK
17	ITV	Playing Nice	7.8	1	UK
18	Netflix	Wednesday	7.8	2	US
19	BBC	Celebrity Race Across the World	7.5	3	UK
20	Amazon	LOL: Last One Laughing UK	7.5	1	UK

Source: Barb, 2025, Adults. TV set viewing. Top performing episode (excludes one-offs, kids, films and sports).

What about YouTube?

British Gas - PeakSave

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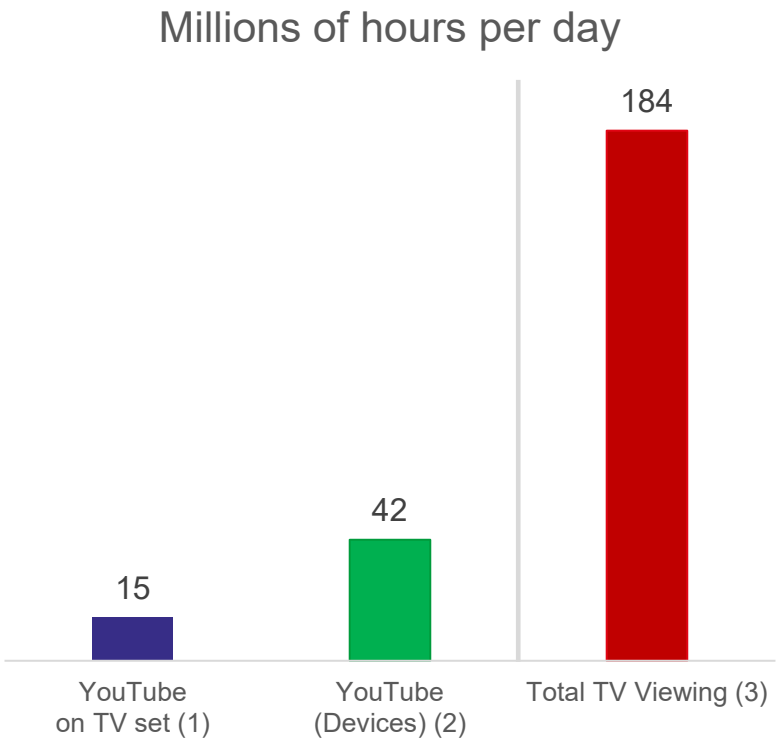
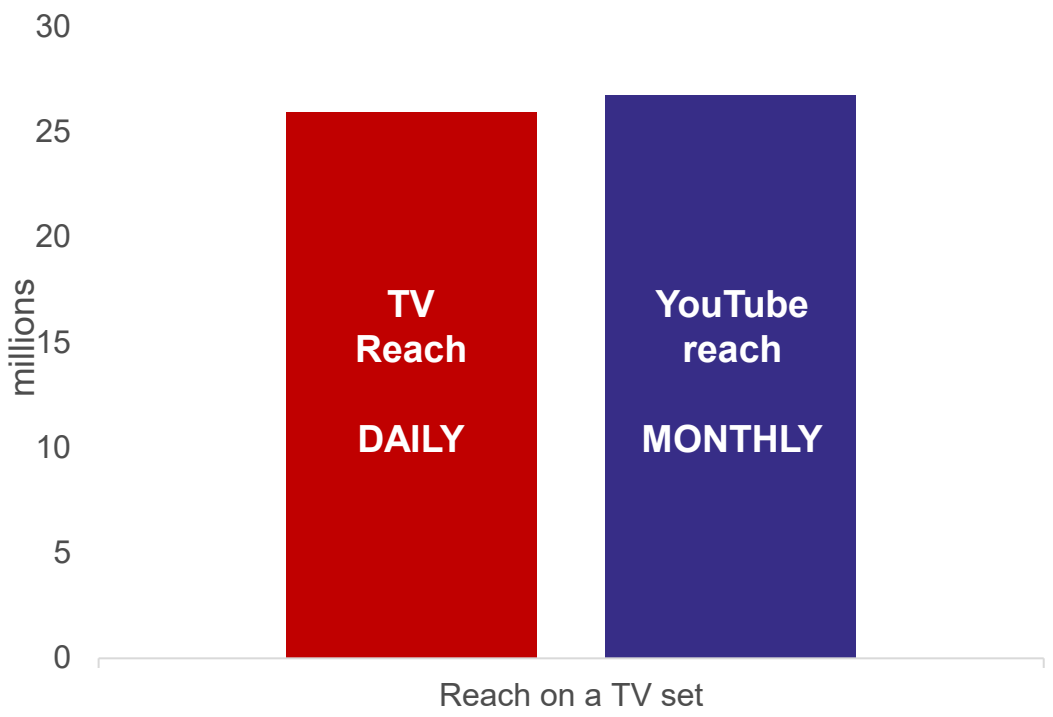
YouTube is less than a third the size of TV



1. Barb, 2025, 16+, TV set viewing only
2. Ipsos Iris, 2025, smartphone, PC/laptop and tablet, 15+
3. Barb, 2025, 16+, TV sets, tablets, PCs and smartphones

YouTube takes a month to deliver TV's daily reach



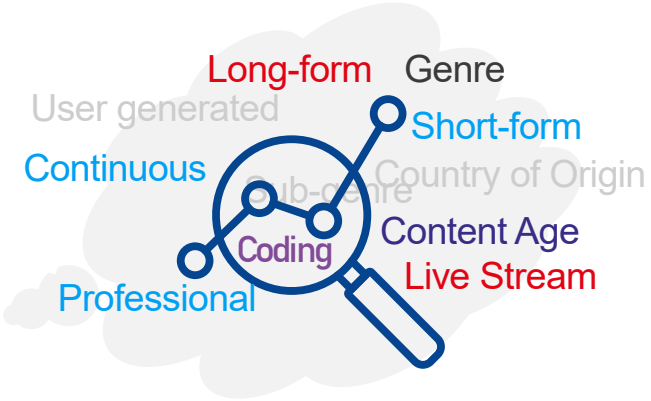
Source: Barb, YouTube & Commercial Broadcaster reach (3+ mins continuous), TV screens, Adults 16+

TRP helped us identify what people watch on YouTube

Bespoke panel + survey

1,000 aged 16+

YouTube viewing log



Detailed panel viewing file built

Weighted to be nationally representative

TRP TRAX TRP RESEARCH

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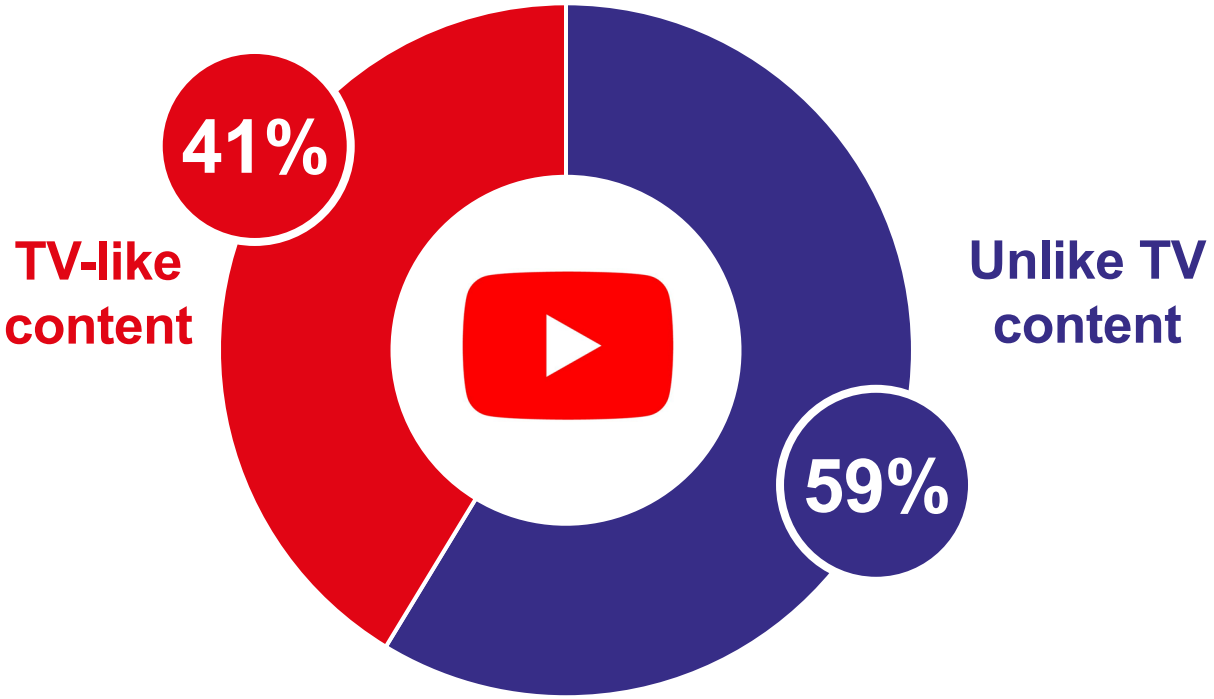
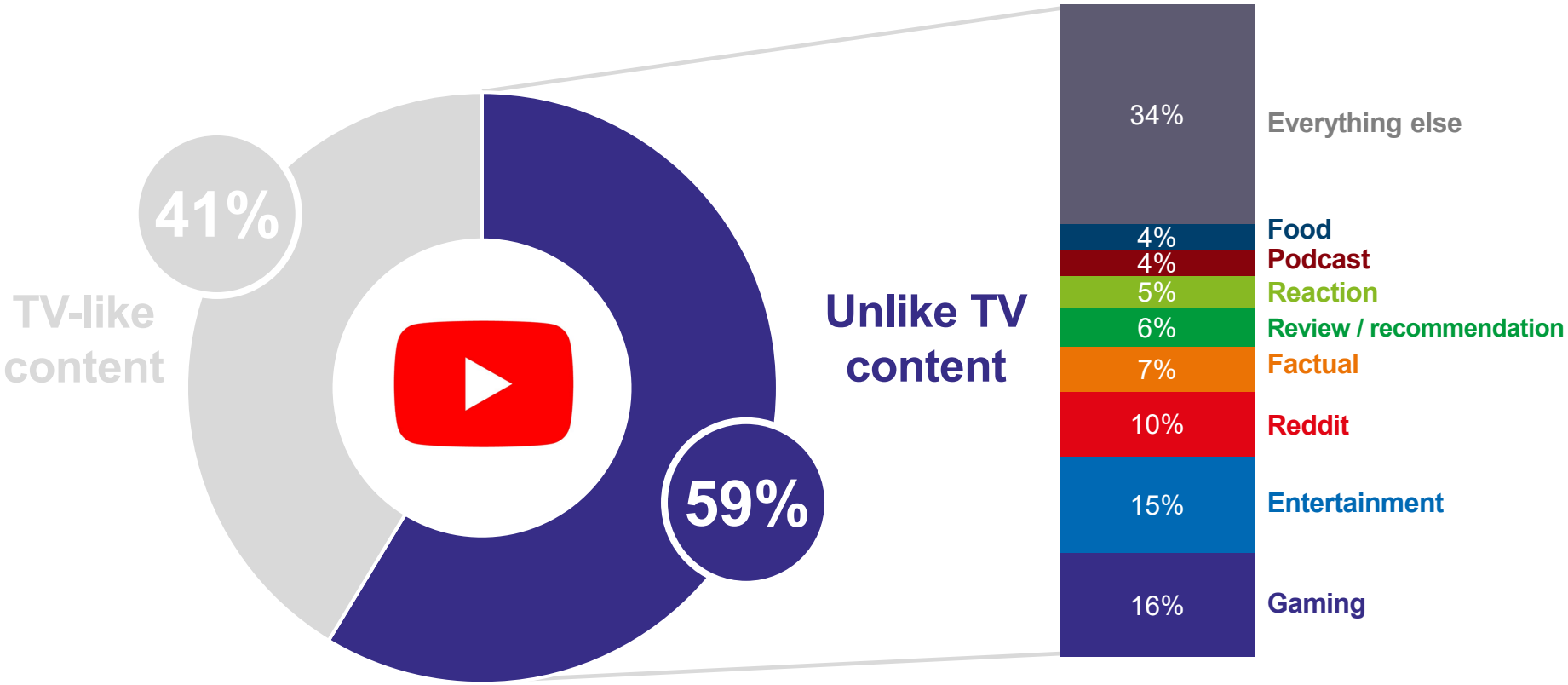
Most content consumed on YouTube is not "TV-like"



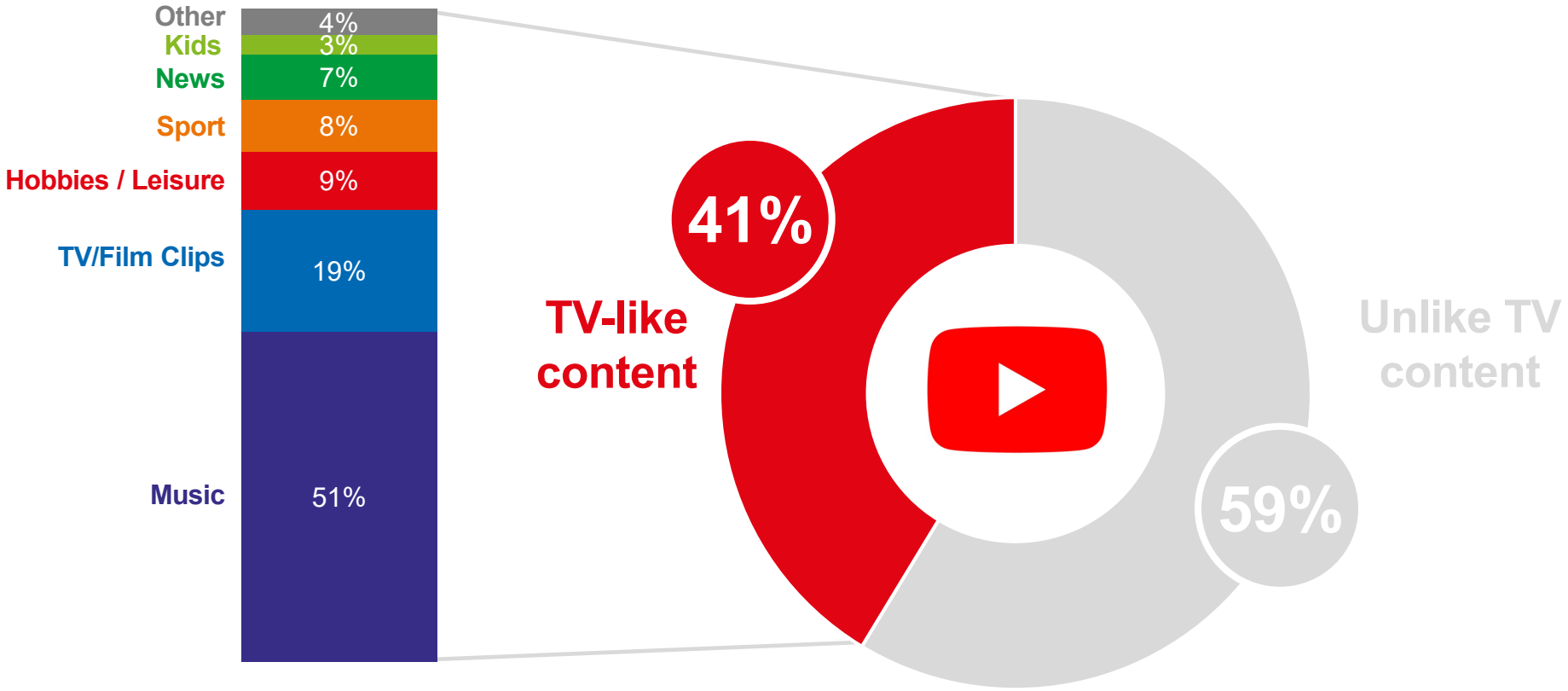
Source: YouTube content data (Q2 2025), Adults 16+, TRP Research

“Unlike TV” is a mishmash of content



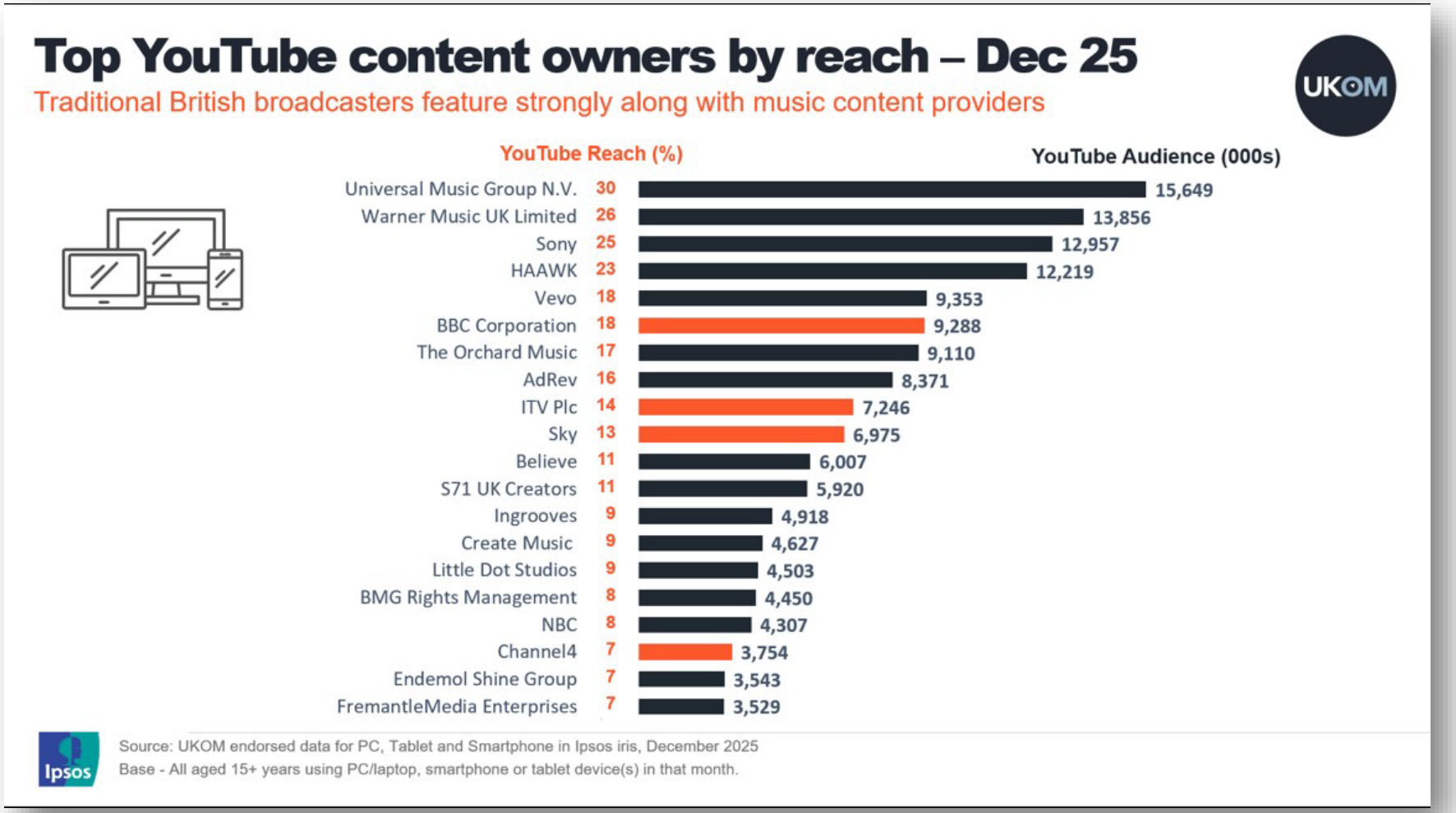
Source: YouTube content data (Q2 2025), Adults 16+, TRP Research

“TV-like” is predominantly music, TV and films



Source: YouTube content data (Q2 2025), Adults 16+, TRP research

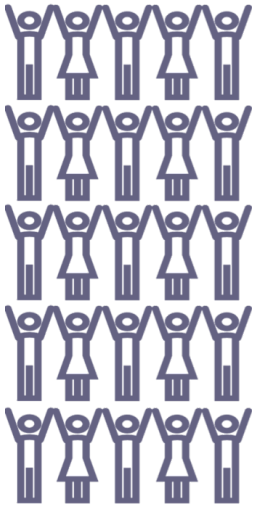
YouTube is heavily audio



Most people don’t watch much YouTube

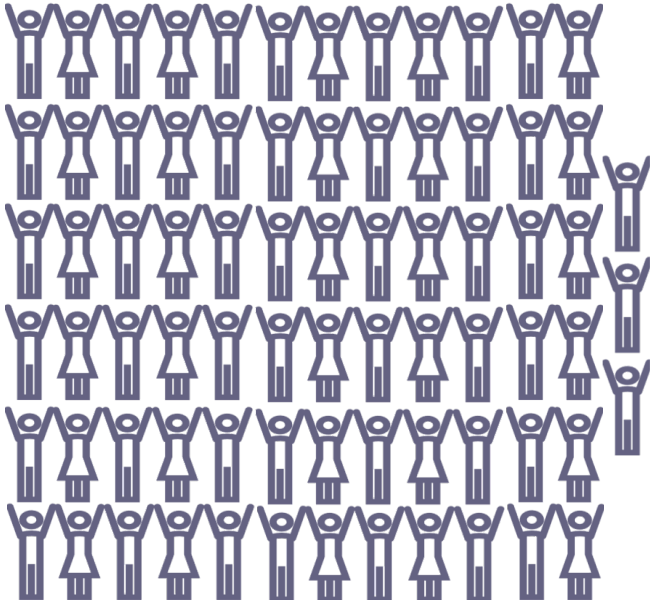
2 hours 1-min per day

Heaviest 25%



6-mins per day

The other 75%

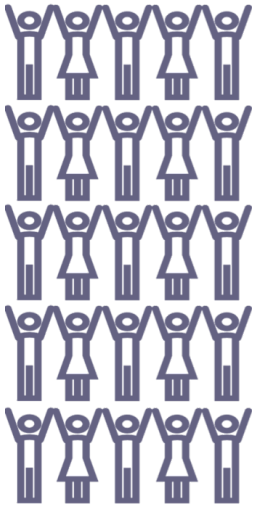


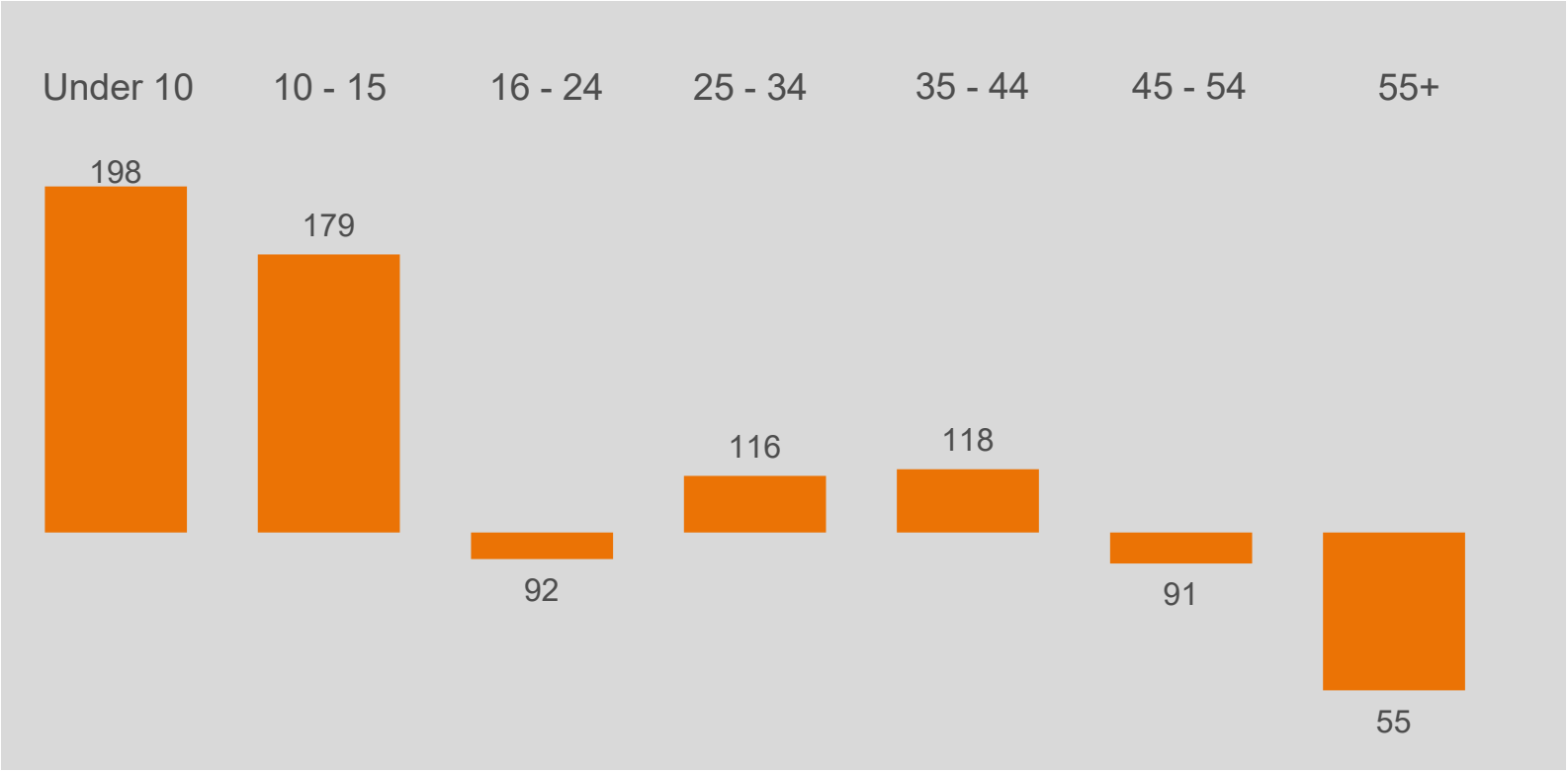
Source: Barb, October 2025, YouTube TV set viewing split into quartiles, 4+

Who are the YouTube superfans?

2 hours 1-min per day

Heaviest 25%





Source: Barb, October 2025, YouTube TV set viewing split into quartiles, 4+
Index of heaviest quartile vs. profile of total TV viewing

YouTube’s biggest fans love TV even more

Source: Barb, October 2025, YouTube TV set viewing split into quartiles, 4+
Heaviest quartile: 2-hours 23-mins of TV per day vs. 2-hours 1-min of YouTube per day

Pot Noodle – Nothing Satisfies Like Pot Noodle

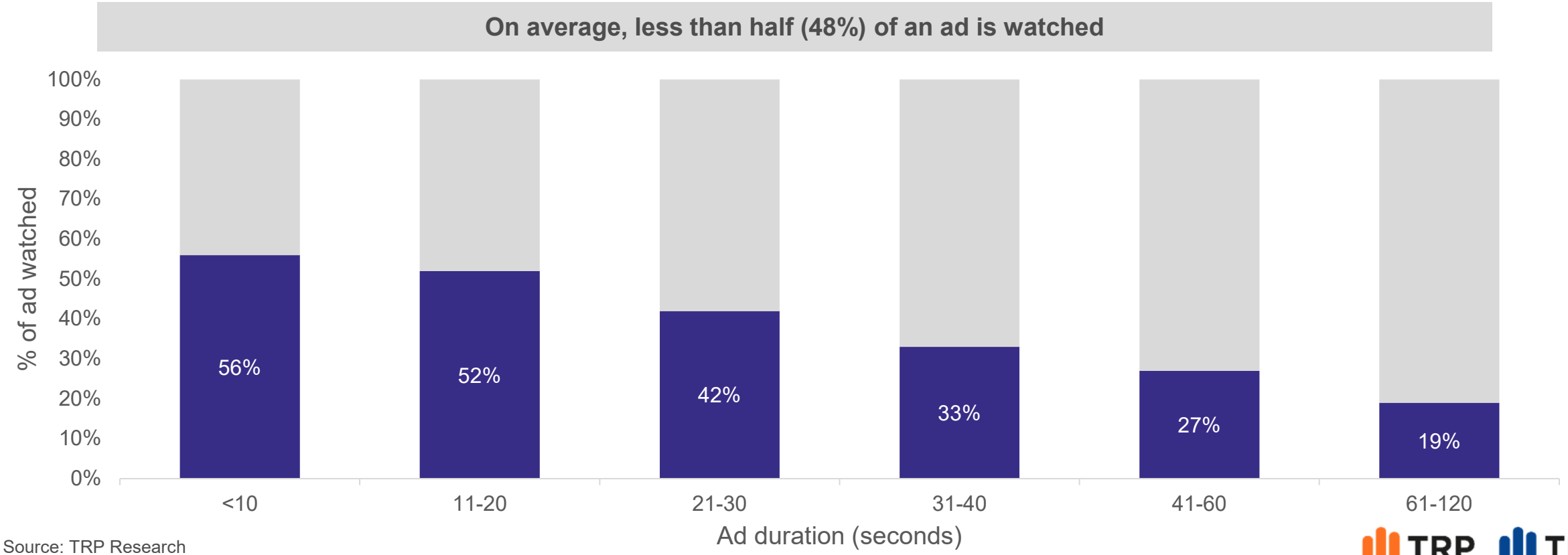
YouTube superfans also watch mass TV programmes

Rank	Programme	Channel Group
1	The Celebrity Traitors	BBC
2	Married at First Sight UK	Channel 4
3	Breakfast	BBC
4	Strictly Come Dancing	BBC
5	Monster: The Ed Gein Story	Netflix
6	Coronation Street	ITV
7	Big Brother	ITV
8	Emmerdale	ITV
9	The Great British Bake Off	Channel 4
10	The Chase	ITV
11	This Morning	ITV
12	Good Morning Britain	ITV
13	Sky News	Sky News
14	ITV Evening News	ITV
15	EastEnders	BBC

Source: Barb, October 2025, YouTube TV set viewing split into quartiles, 4+
Heaviest quartile

Married at First Sight UK – Channel 4

The longer the YouTube ad, the more of it is skipped



Source: TRP Research

Advertising Time

Xbox – Luke Littler

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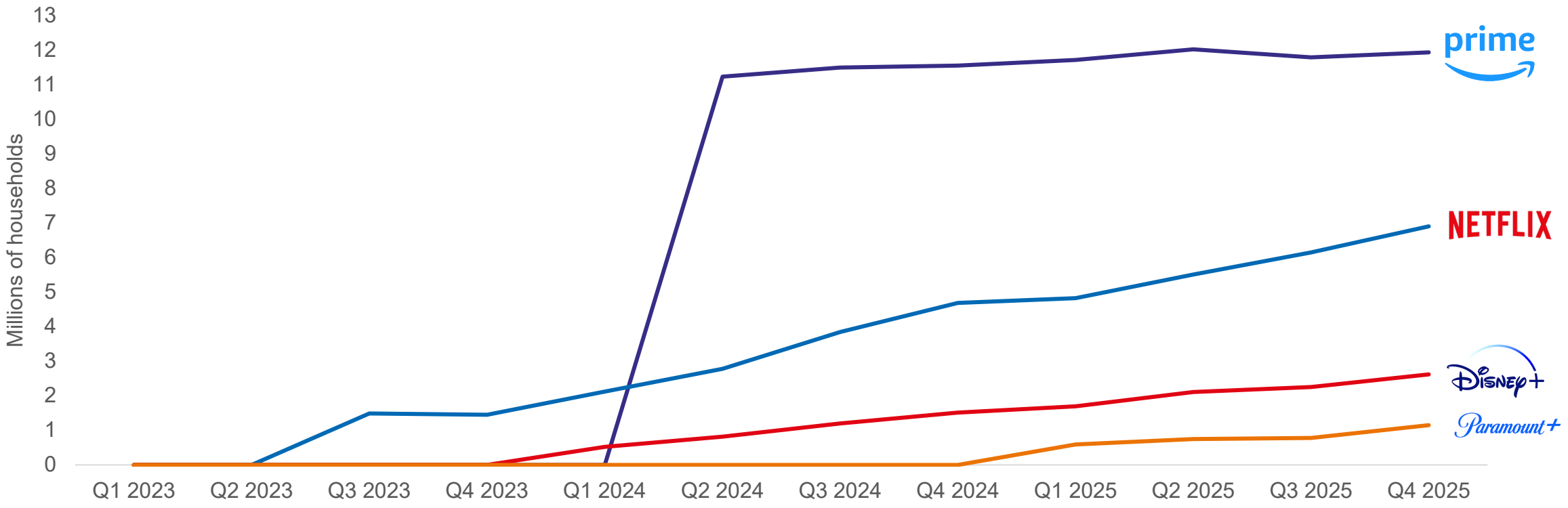
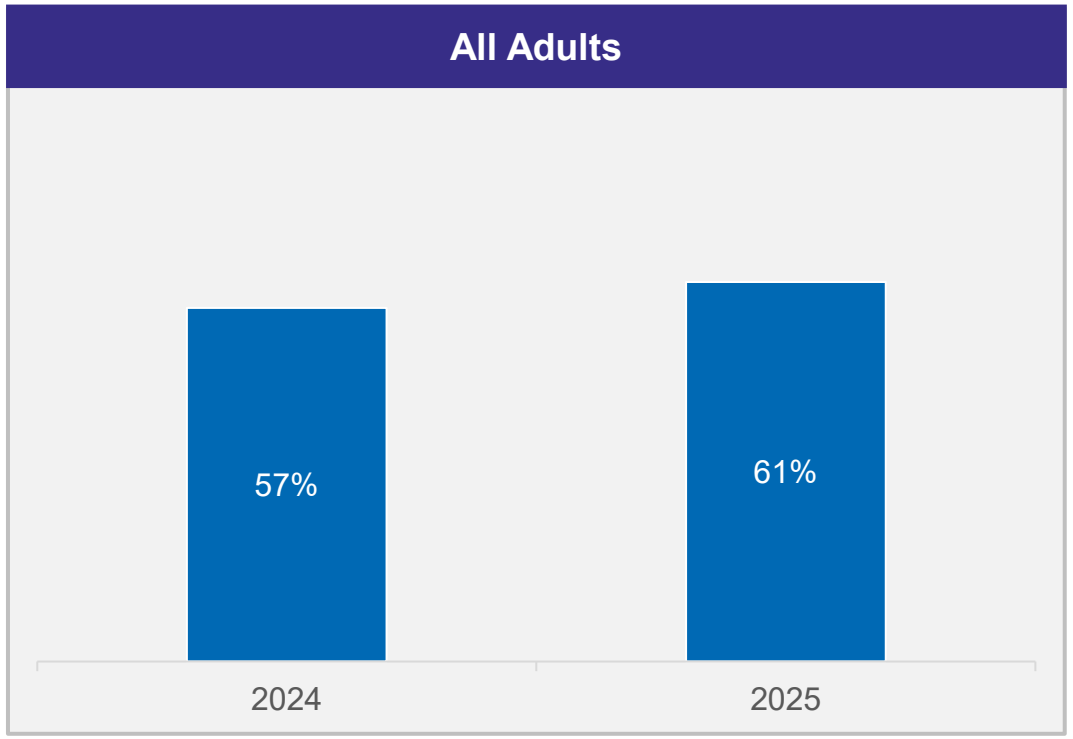
SVOD ad tiers expand, boosting Total TV inventory



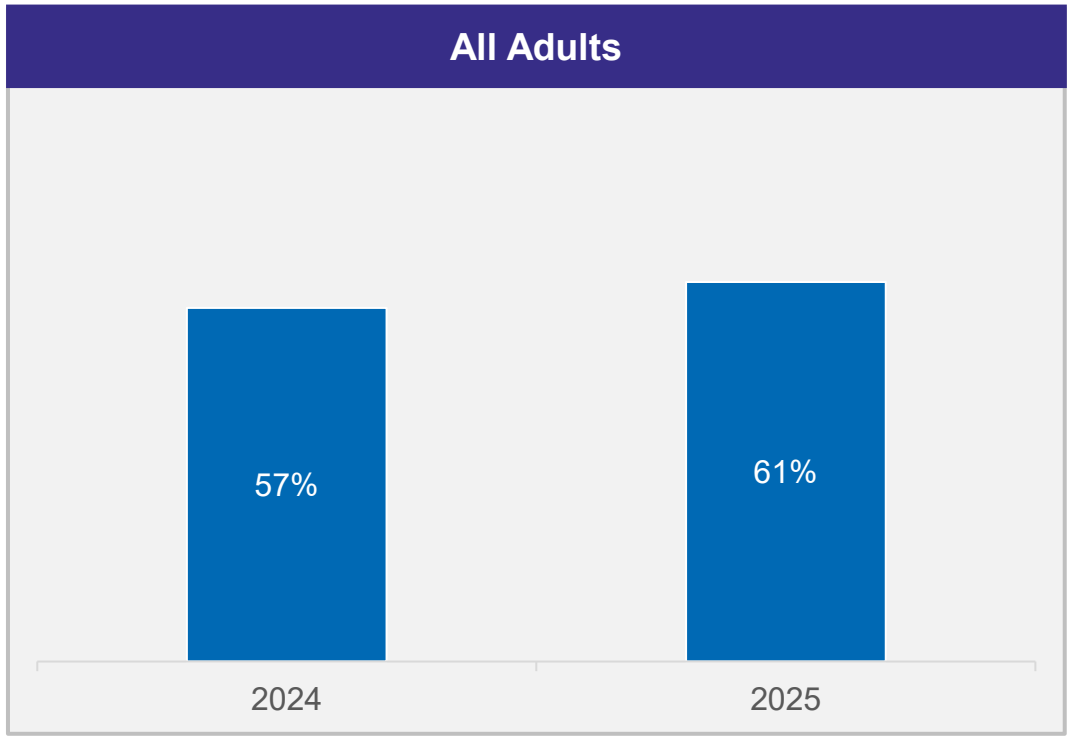
Source: Barb Establishment Survey, subscription to ad-tier service

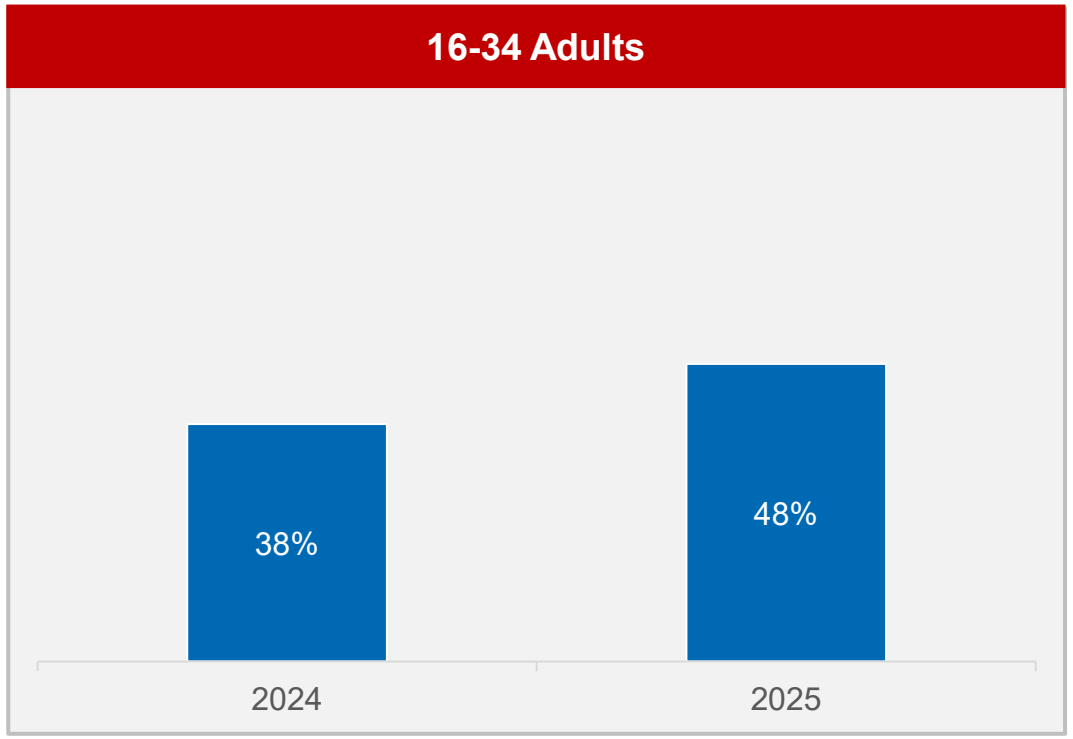
Now even easier to reach audiences with TV advertising



Source: Barb 2025 – TV set viewing, proportion of total viewer minutes that are ad supported

Now even easier to reach 16-34s with TV advertising





Source: Barb 2025 – TV set viewing, proportion of total viewer minutes that are ad supported

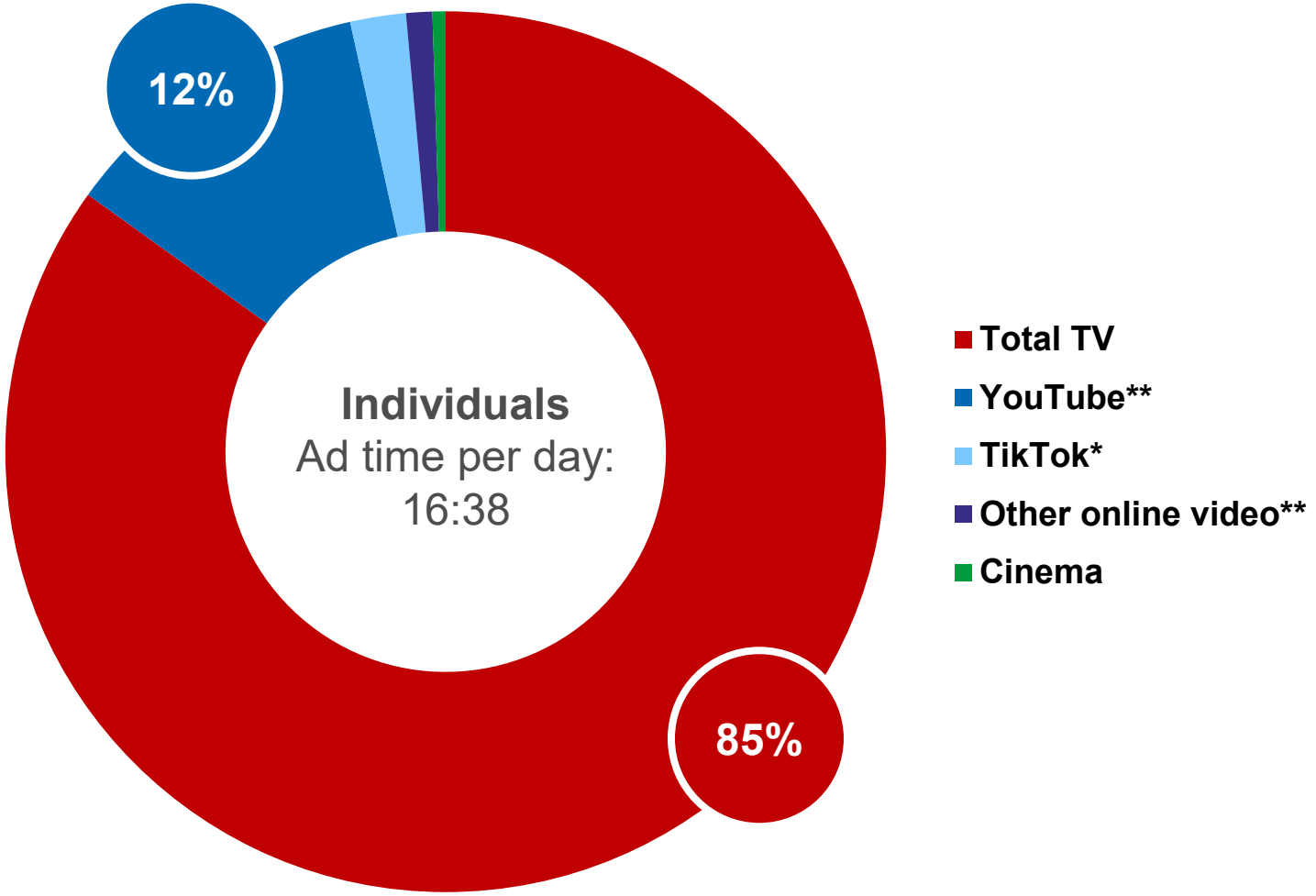
Commercial TV: where millions gather

Rank	Channel Group	Programme Title	Average Audience (m)	Series	Origin
1	ITV	I'm a Celebrity... Get Me Out of Here!	9.1	25	UK
2	Channel 4	The Great British Bake Off	8.6	16	UK
3	ITV	Vera	8.5	14	UK
4	ITV	Unforgotten	8.4	6	UK
5	ITV	The 1% Club	8.4	4	UK
6	ITV	Playing Nice	7.8	1	UK
7	ITV	Protection (PKA Witness Protection)	7.5	1	UK
8	Amazon Ad Tier	Clarkson's Farm	7.4	4	UK
9	ITV	Trigger Point	7.0	3	UK
10	ITV	Britain's Got Talent	6.9	18	UK

Rank	Channel Group	Programme Title	Average Audience (m)	Series	Origin
11	ITV	Code of Silence	6.8	1	UK
12	ITV	Who Wants to Be a Millionaire?	6.7	35	UK
13	ITV	The Bay	6.6	5	UK
14	ITV	Who Wants to Be a Millionaire? Celebrity Specials	6.3	35	UK
15	ITV	Out There	6.3	1	UK
16	ITV	Grace	6.2	5	UK
17	Channel 4	Gogglebox	5.7	24	UK
18	Channel 4	24 Hours in Police Custody	5.6	4	UK
19	ITV	I Fought the Law	5.6	1	UK
20	ITV	The Chase Celebrity Special	5.5	12	UK

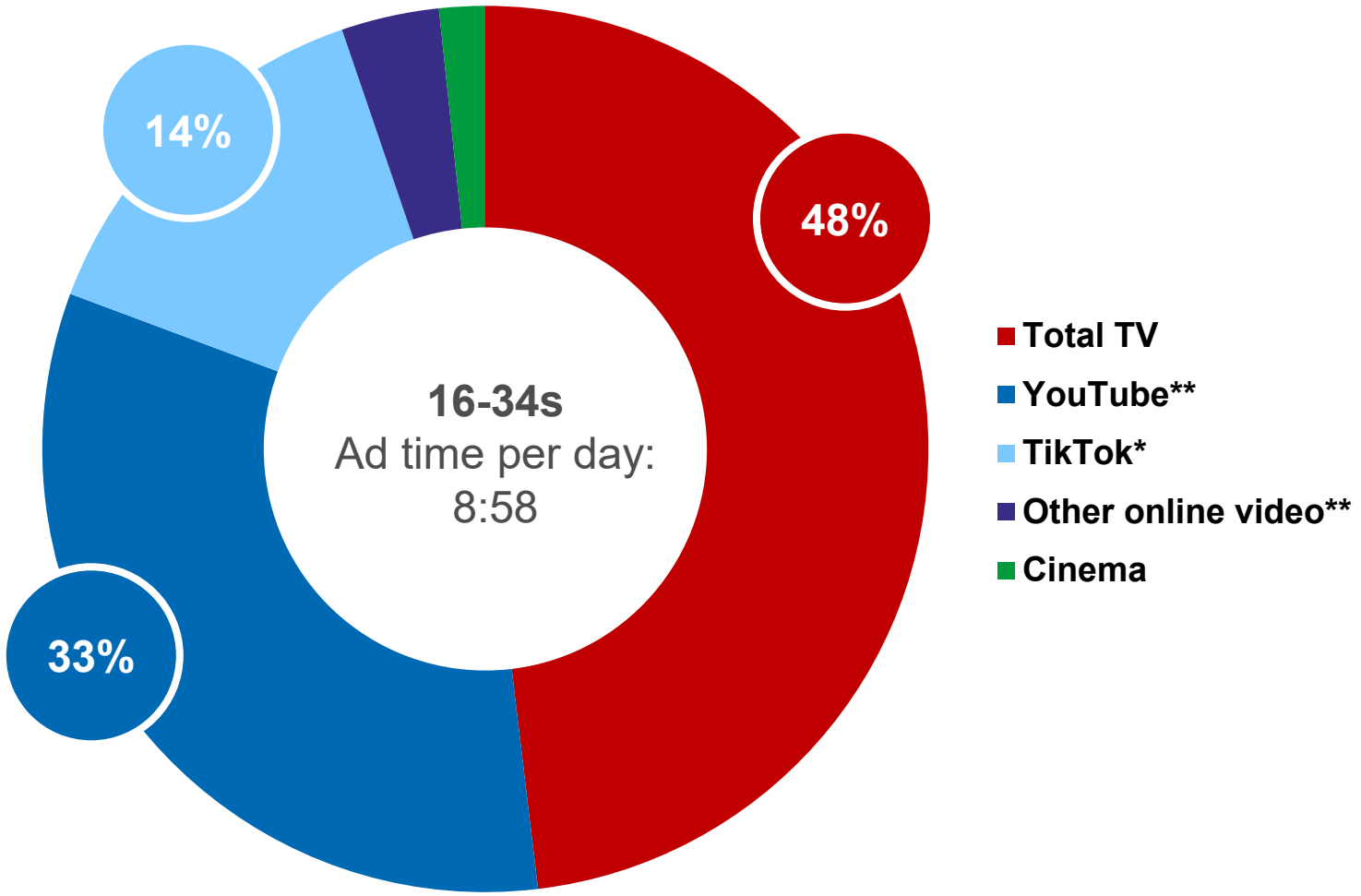
Source: Barb, 2025, Adults. TV set viewing. Top performing episode (excludes one-offs, kids, films and sports).

Total TV accounts for 85% of all AV advertising time



Source: 2025, Barb / Broadcaster stream data / UK Cinema Association / Ipsos Iris
**YouTube ad time modelled at 3.33% of content time (Enders Analysis, 23rd October 2024) and excludes those estimated to be on the YouTube Premium tier.
*TikTok ad time modelled at 3.4% of content time using agency and broadcaster estimates. **Other online modelled at 3.33% of content time.

16-34s spend more time with TV advertising than YouTube and TikTok combined



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Where your advertising is seen matters

What factors impact advertising recall?

What factors help maintain purchase intent?

6.3x

The right in-home advertising context can increase ad recall by up to 6.3 times

Moju – Game Show

Source: Context Effects, Map The Territory & Tapestry Research, 2024

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Not all advertising contexts deliver the same impact

- Big screen
- Professionally produced content
- Location
- Mood
- Occasion satisfaction
- Shared viewing

Source: Context Effects, Map The Territory & Tapestry Research, 2024

Not all advertising contexts deliver the same impact

- Big screen
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Source: Context Effects, Map The Territory & Tapestry Research, 2024

Shared TV viewing occasions drive ad performance

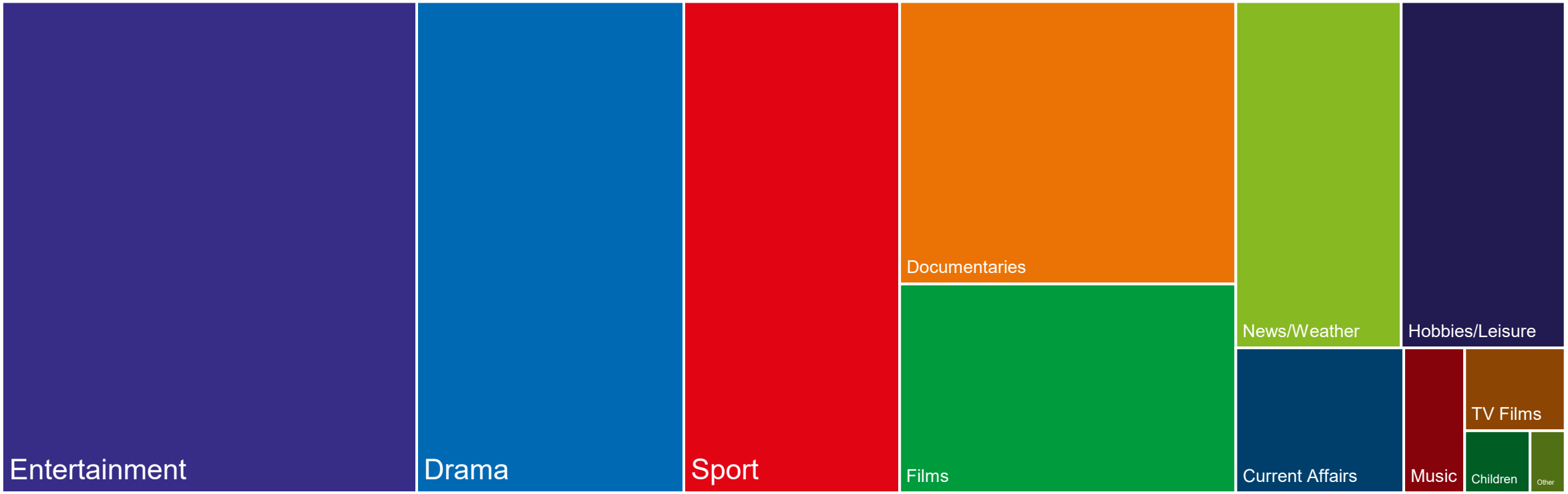
+23% higher ad recall

+15% higher brand trust

+75% greater liking of the TV ads

Source: Context Effects, Map The Territory & Tapestry Research, 2024

Shared viewing happens in all TV genres



Source: Barb 2025, Co-viewing 2+, Commercial Broadcasters. % of all co-viewing

TV shows that brought people together

Rank	Channel Group	Genre	Programme Title	Total Audience	Co-Viewing Proportion
1	Sky	Drama	The Last Of Us	1.3	69%
2	Sky	Entertainment	Rob & Romesh vs...	1.3	69%
3	Prime Video Ad Tier	Entertainment	LOL: Last One Laughing UK	5.0	69%
4	Channel 4	Entertainment	Taskmaster	2.2	68%
5	UKTV	Drama	Bookish	1.3	68%
6	ITV	Entertainment	The 1% Club	2.9	68%
7	Prime Video Ad Tier	Entertainment	LOL: Last One Laughing Ireland	1.1	68%
8	Sky	Drama	The Day Of The Jackal	1.1	67%
9	ITV	Drama	Code of Silence	1.1	67%
10	Sky	Drama	Brassic	1.2	67%
11	ITV	Entertainment	Win Win with People’s Postcode Lottery	1.0	66%
12	ITV	Entertainment	Ant & Dec's Limitless Win	3.5	66%
13	Channel 4	Entertainment	Gogglebox	2.3	66%
14	ITV	Drama	Trigger Point	7.0	65%
15	Sky	Drama	Atomic	1.2	65%

Source: Barb, 2025, 16+ co-viewing, commercial TV set, entertainment & drama, over 1m total audience, all Christmas specials and one-offs removed, ranked by shared viewing proportion.

In summary…

The world hasn't changed as much as we think

TV remains dominant

The growth of VOD continues

Total TV ad opportunities are increasing

YouTube consumption highly skewed

Heavy YouTube viewers watch more TV than YouTube

Context is key for commercial impact

Shared viewing is actionable

Chapter 3:
Cutting through the chaos

Elliott Millard, Chief Strategy Officer, Thinkbox

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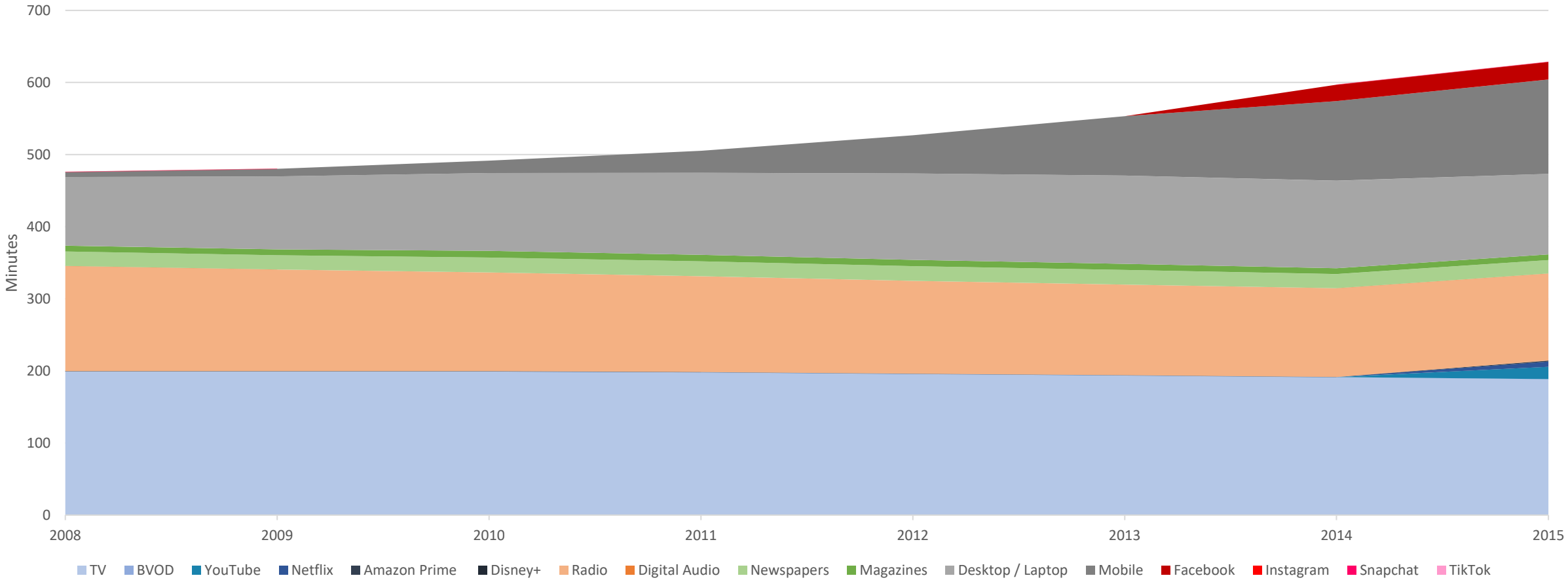
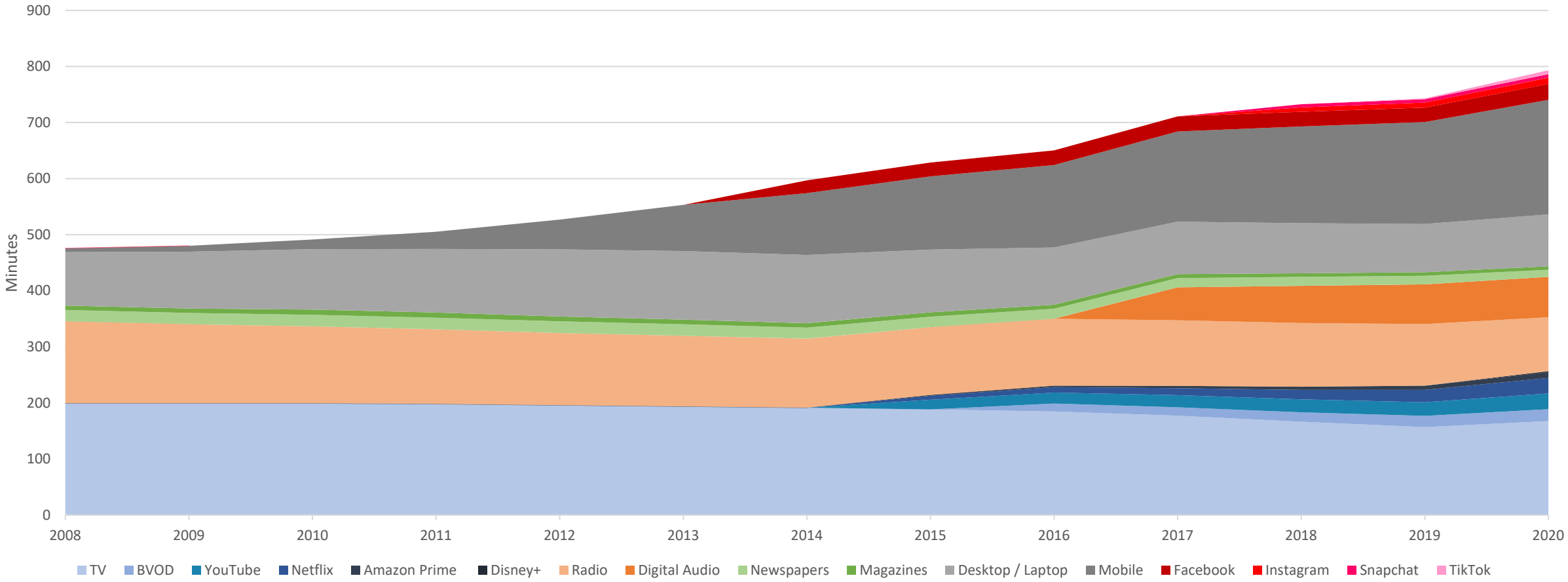
Remember when life was simple?



Source: eMarketer, time spent with media per day 2008 - 2026

Remember when life was simple?



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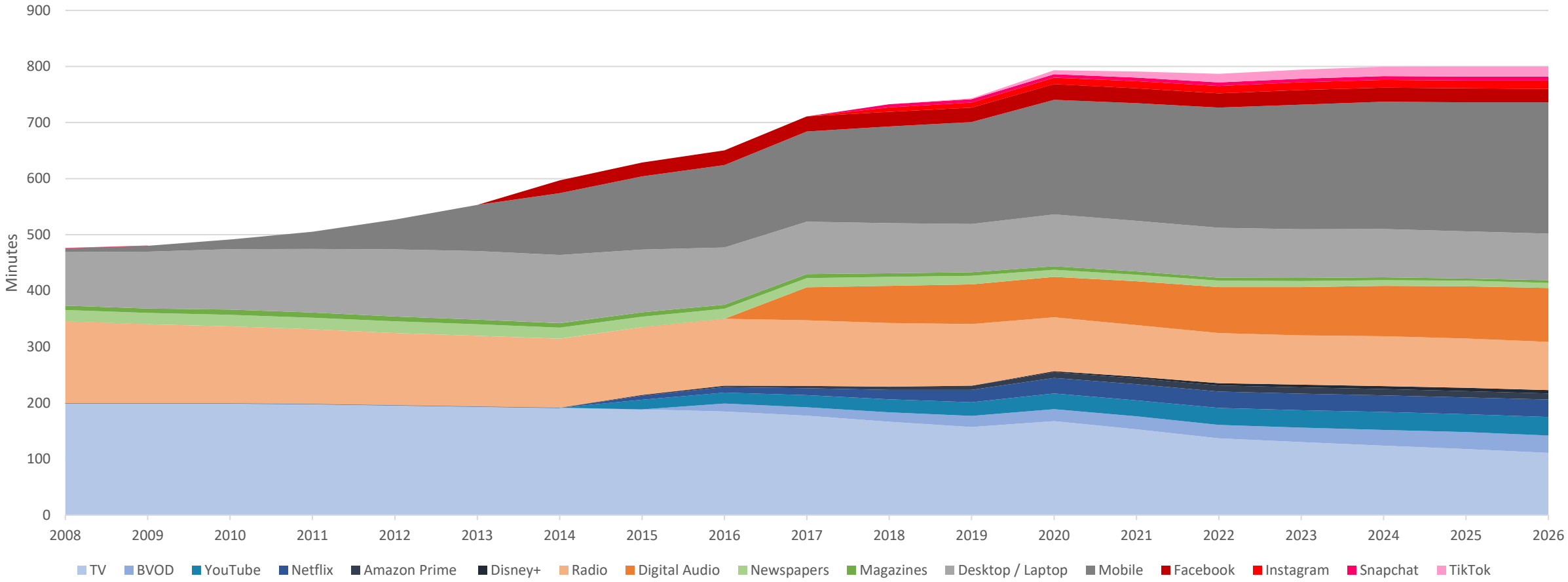

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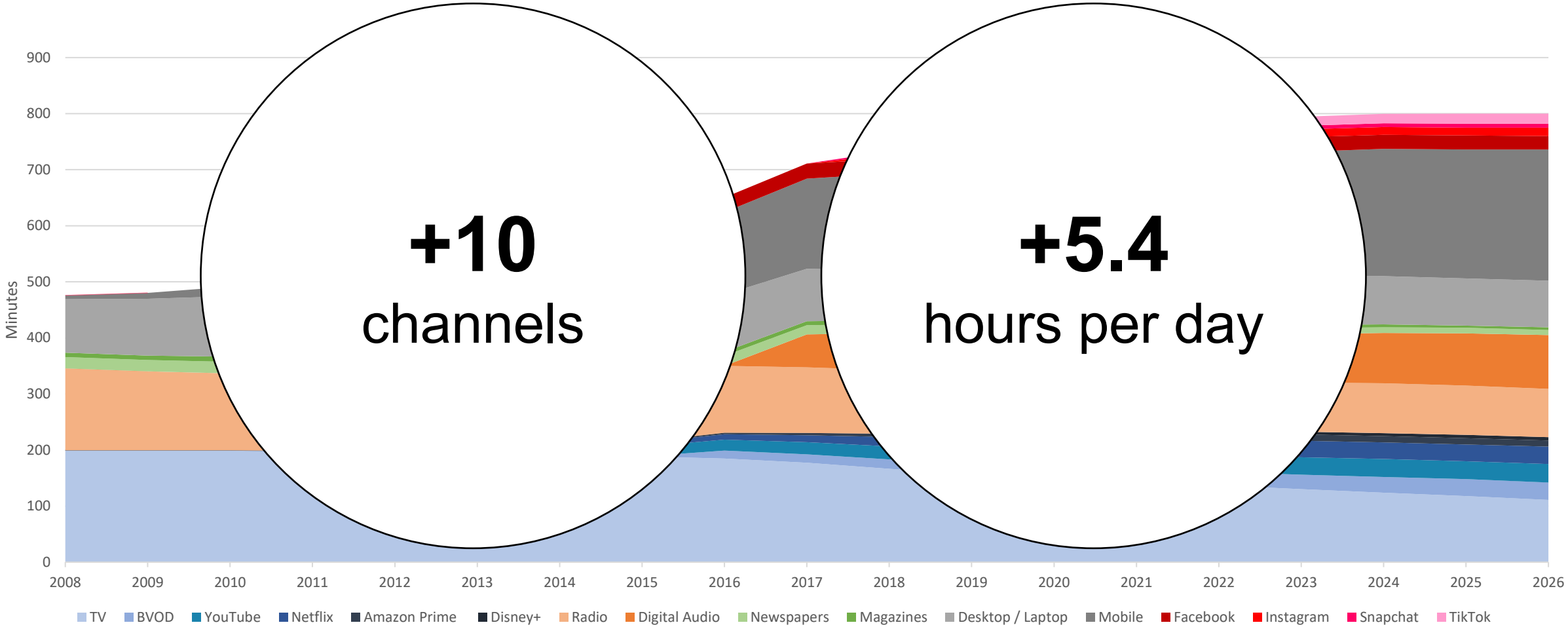
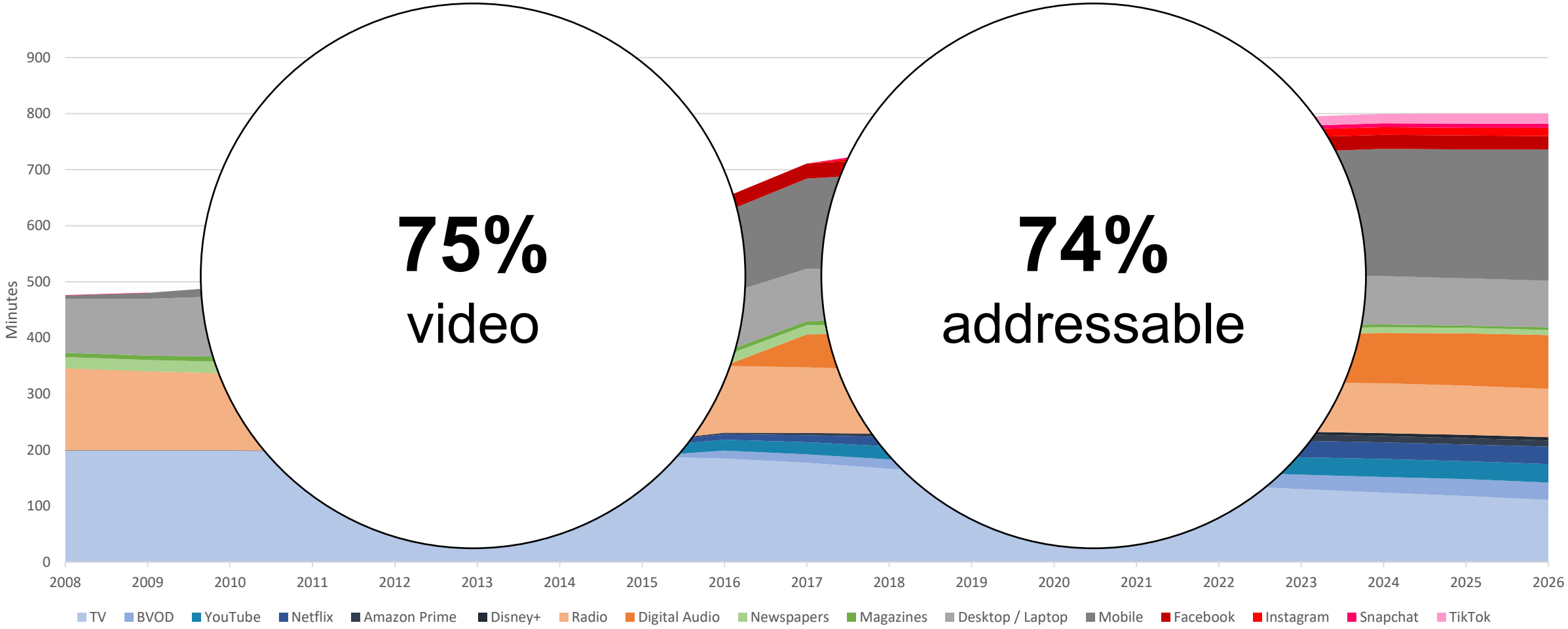
More channels, more time



Source: eMarketer, time spent with media per day 2008 - 2026

Everything is video, everything is addressable

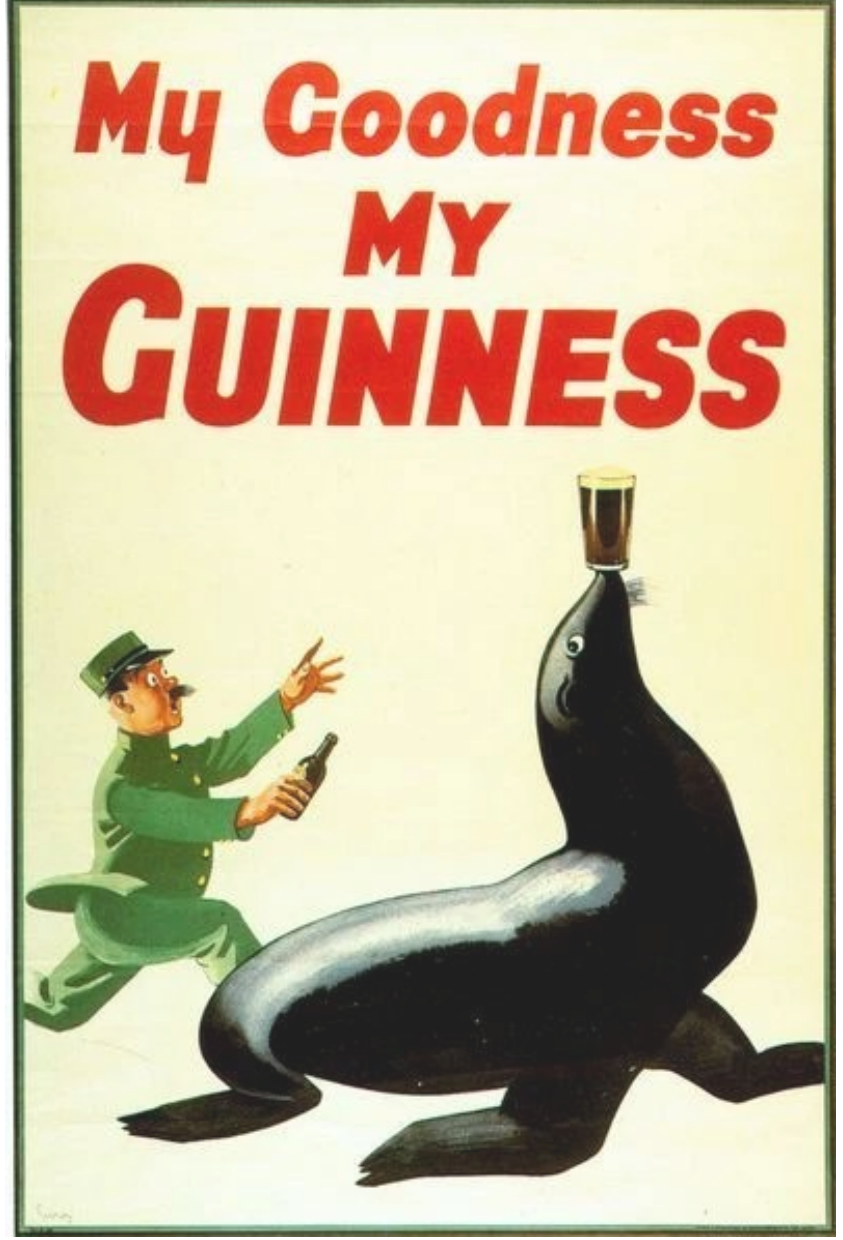


Source: eMarketer, time spent with media per day 2008 - 2026

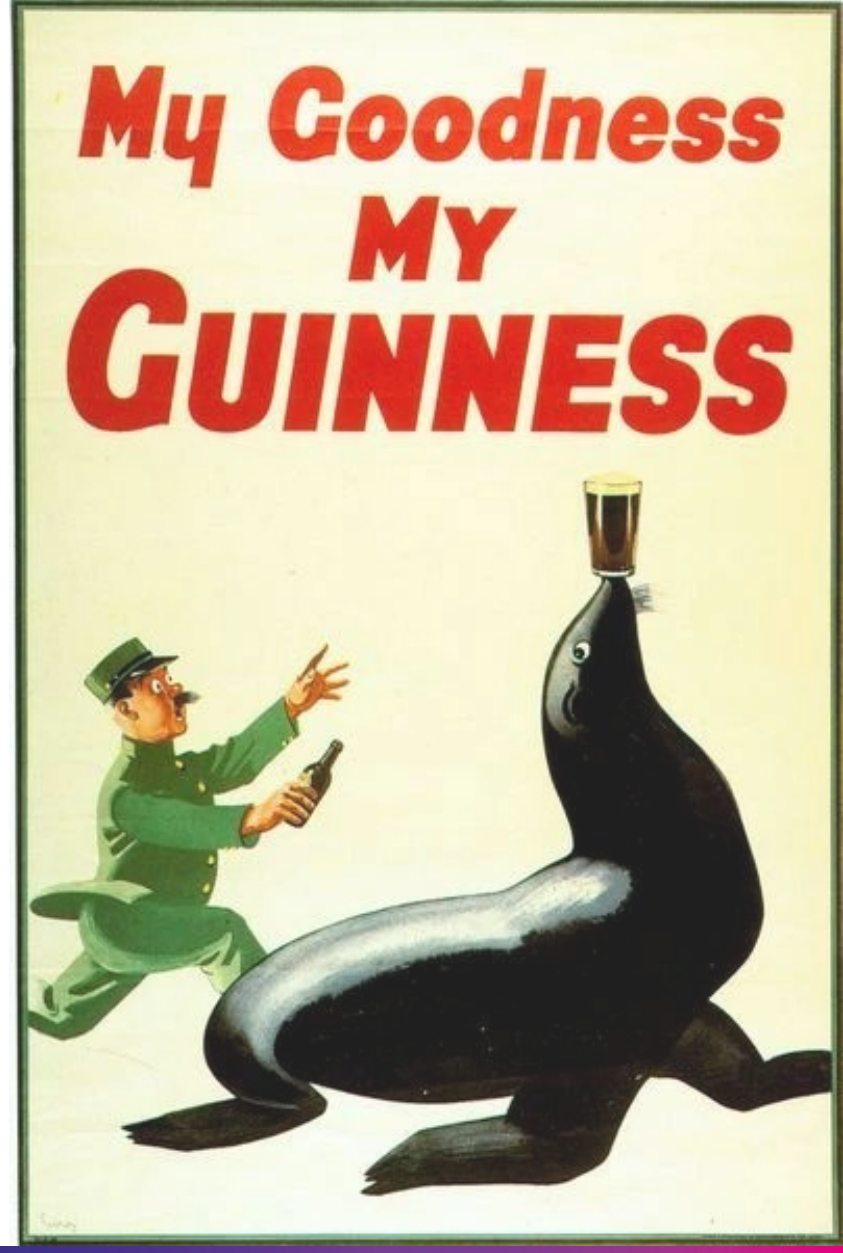
Why did video eat everything?

McDonalds – All Flavour, No Mess

Movement makes us pay attention



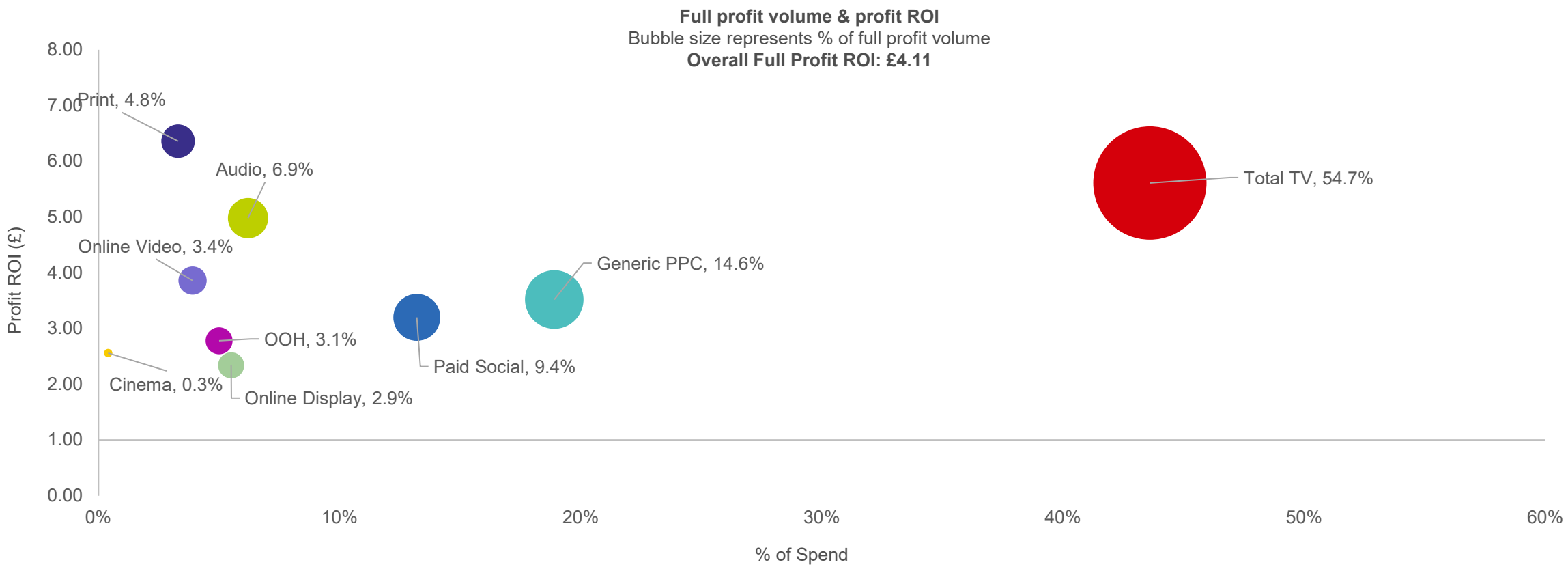
A
Guinness poster
comes to life


My Goodness
MY
GUINNESS

And video <u>works</u>

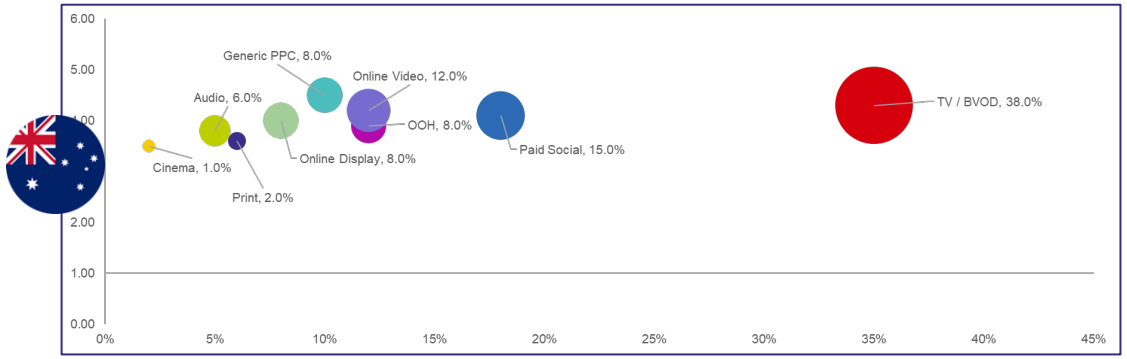
Deliveroo – Unexpected Guests

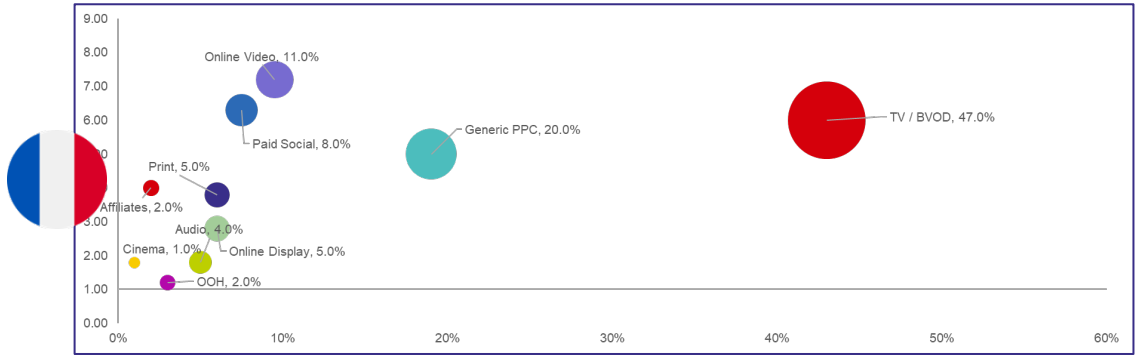
We know that Total TV is powerful

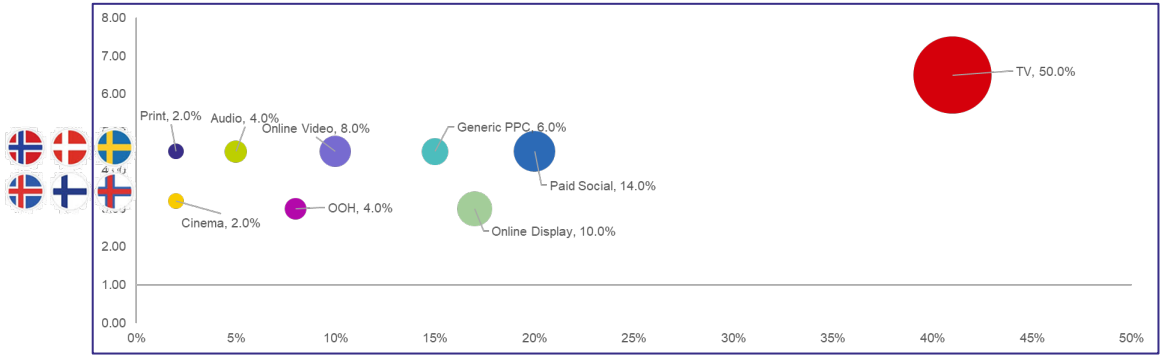


Source: Profit Ability 2, April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.
Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK

And that there is something consistent about that power







Source: Acceleration Nordic media database, 2019 – 2023; ADMTV, RTL TV Key Facts 2025; Choreograph Australia

74%

Of investment

BUT

84%

Of profit

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

Why is everything becoming addressable?

Jagermeister – Flowers For Society

Addressability is how we bring data into advertising

“Advertising that is served to a uniquely identified individual or a device within a given context”

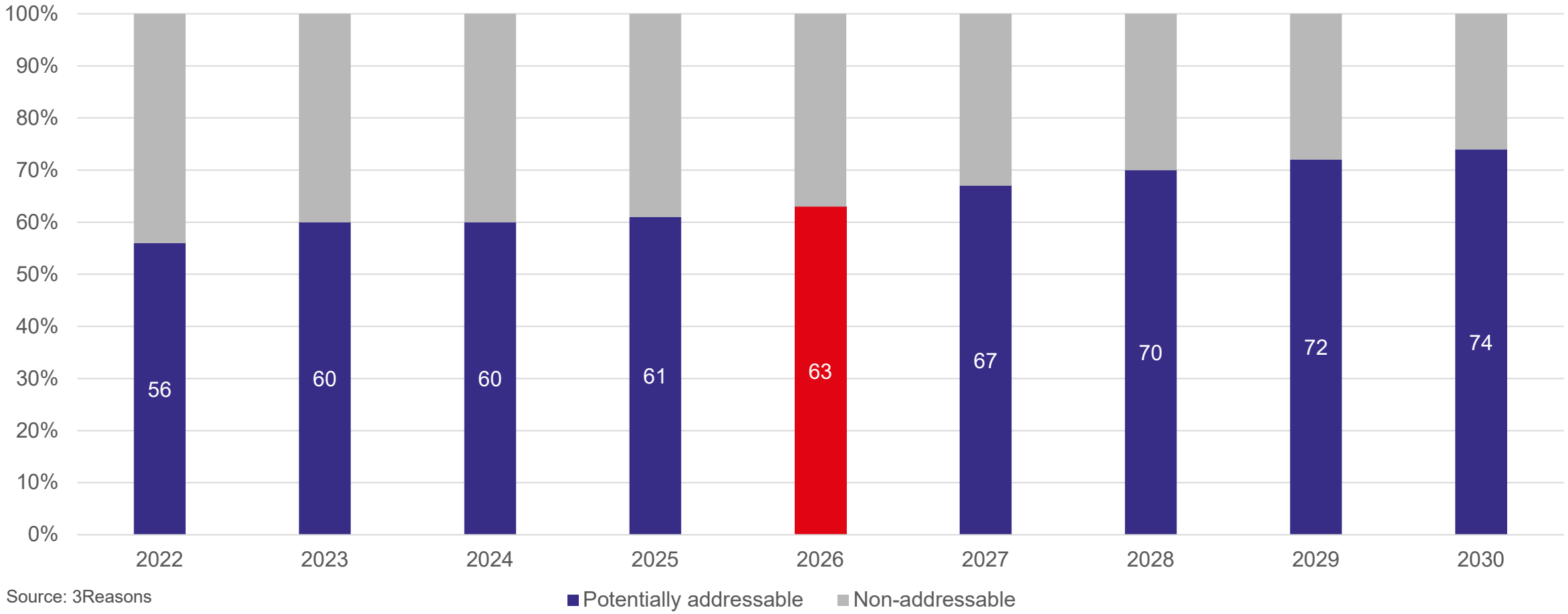
Source: IAB

thinkbox

Not all addressable advertising is created equal

Warburtons – The Inspection

Addressable TV has come of age



Source: 3Reasons

And addressability makes Total TV work even harder

Source: Sky, The Addressable Advantage

* vs linear TV alone; ** when including First Party Data

thinkbox

So we've been listening to the industry

TNT Sports – Dare To Dream

“You can serve the right car with the right features to the right house…

…or tell a sequential story

You can create a deeper connection with the viewer”

Land Rover – The Journey

Source: MTM industry consultation, 2026

“… the consumer experience of media is not as fragmented as the language we’ve developed.”

Source: WARC

Cadbury Heroes – All Heroes, No Zeroes

“As a media industry, we’ve got more acronyms than we know what to do with, but the general population doesn’t see that.

TV is just TV”

Source: MTM industry consultation, 2026

Papaya – Solitaire

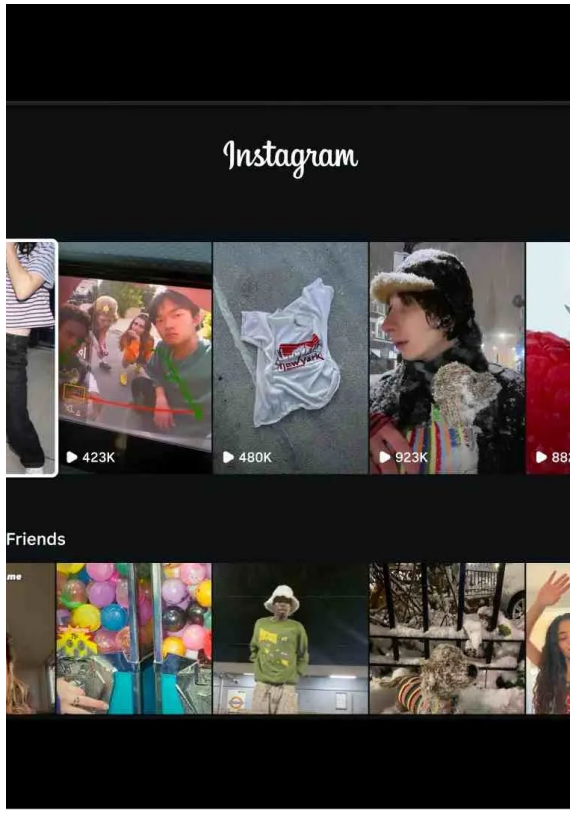
“The world has changed, and there's a huge opportunity for advertisers.

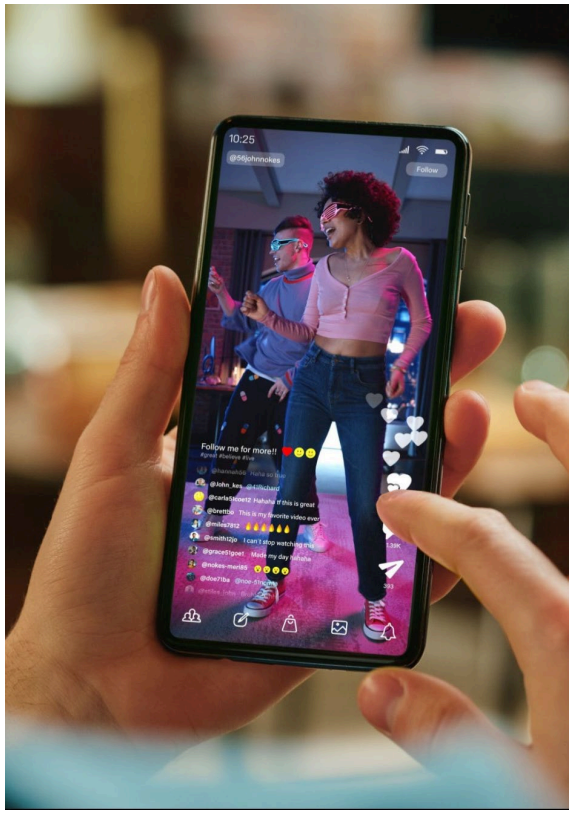
But the industry has got to change”

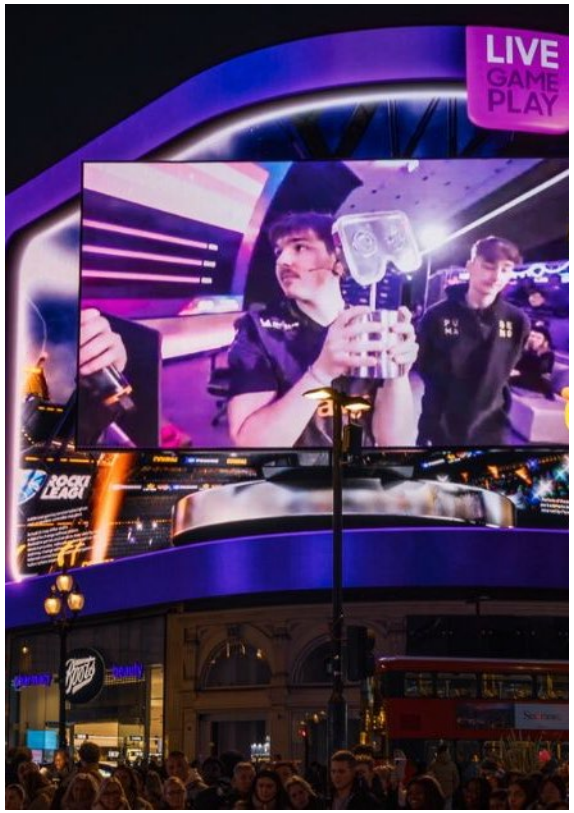
Source: MTM industry consultation, 2026

DVLA - Dog

So we’re in a video landgrab moment







Just saying
something doesn’t
make it true

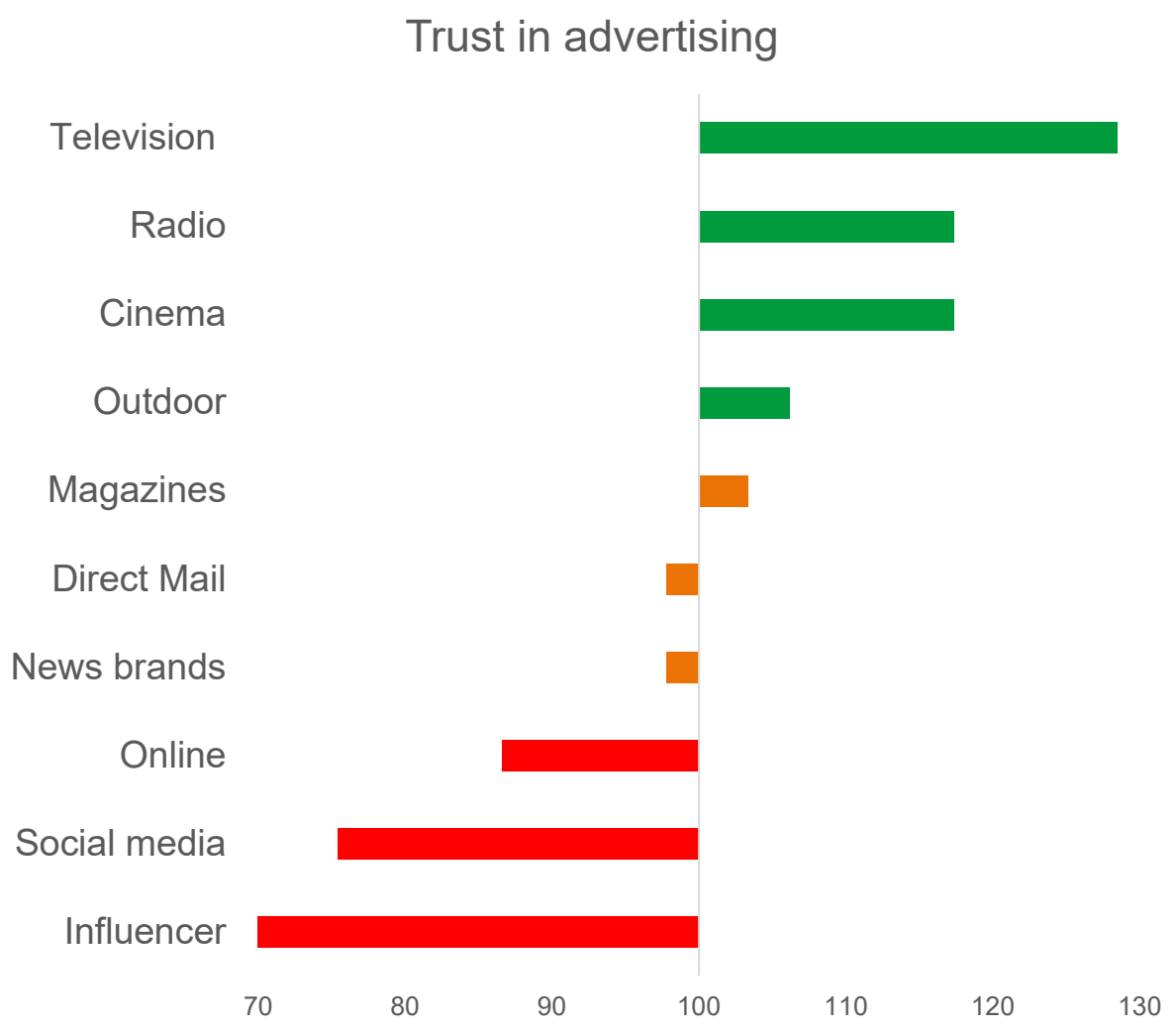
For advertisers, Total TV offers something special

Regulated

Professionally produced

Verified by humans

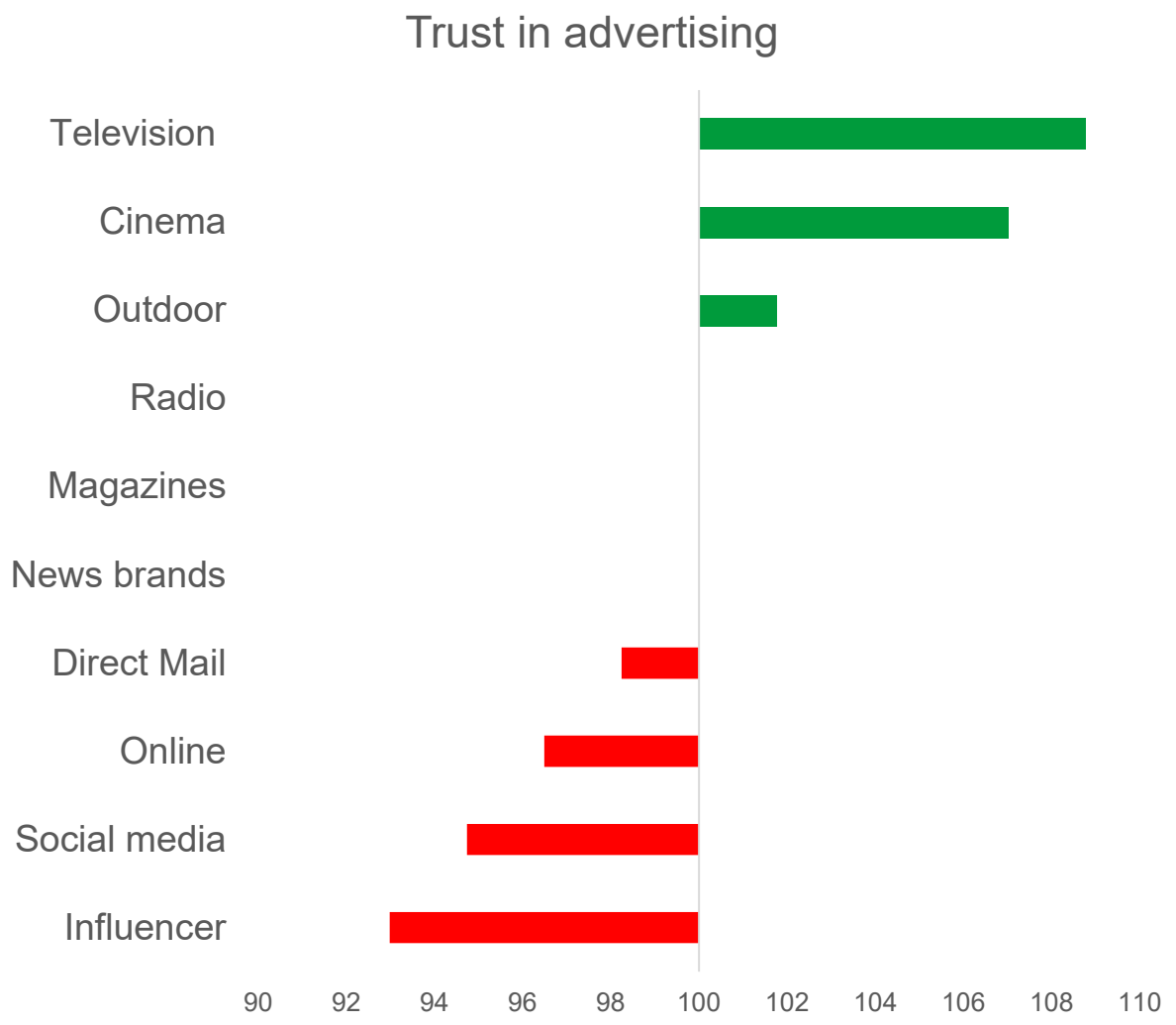
Independently measured



Source: Credos Trust Tracker, indexed, all adults

For viewers, TV just means trusted

thinkbox



Source: Credos Trust Tracker, indexed, 16-34

That’s true for younger viewers as well

thinkbox

That’s what makes TV… TV

- Regulated
- Professionally produced
- Verified by humans
- Independently measured
- Trusted by viewers

The video channels that deliver that are Total TV

- Regulated
- Professionally produced
- Verified by humans
- Independently measured
- Trusted by viewers

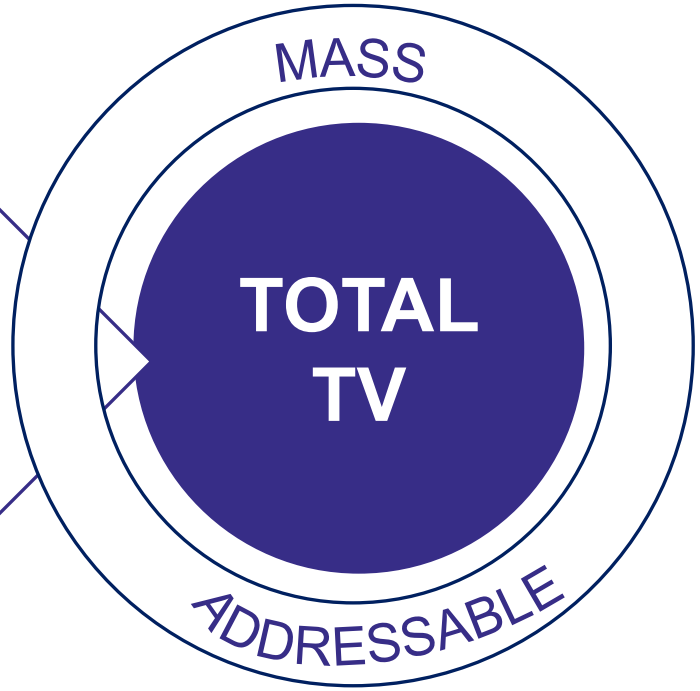
TOTAL TV

An environment rather than unhelpful acronyms

- Regulated
- Professionally produced
- Verified by humans
- Independently measured
- Trusted by viewers

A single environment, in two modes

- Regulated
- Professionally produced
- Verified by humans
- Independently measured
- Trusted by viewers



Those modes are available across the whole TV ecosystem

Total TV

Only Total TV delivers the return and trust you need

Addressable gives you broadcast reach AND precision targeting

A single, extraordinary environment; two modes.

thinkbox

TV Now and Next

thinkbox