TV Now and Next

thinkbox

Chapter 1:
The viewing landscape

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What we will cover today

What's been happening to video viewing levels?

What video content are people consuming?
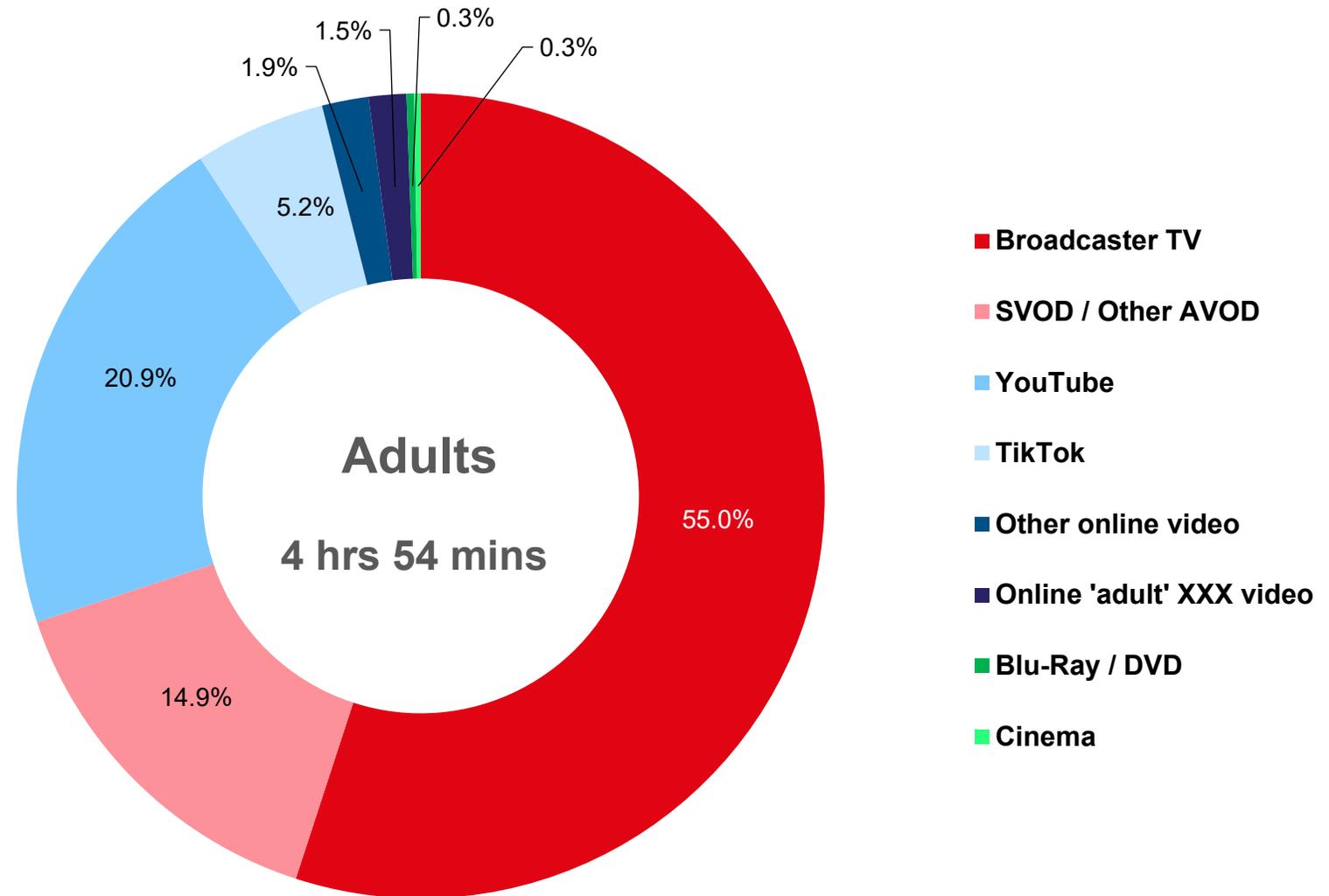

What does this mean for exposure to advertising?

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A decade of disruption

Hours per person per day (Adults)

04:30
04:00
03:30
03:00
02:30
02:00
01:30
01:00
00:30
00:00

2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 2025

Legend:
- Cinema
- Other online video
- TikTok
- YouTube
- Broadcaster TV + SVOD

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A decade of disruption and TV remains dominant

Hours per person per day (Adults)

04:30
04:00
03:30
03:00
02:30
02:00
01:30
01:00
00:30
00:00

2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 2025

Legend:
- Cinema
- Other online video
- TikTok
- YouTube
- Broadcaster TV + SVOD

Source: IPA TouchPoints, Adults 15+

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

Adults

4 hrs 54 mins

- 55.0% Broadcaster TV
- 14.9% SVOD / Other AVOD
- 20.9% YouTube
- 5.2% TikTok
- 1.9% Other online video
- 1.5% Online 'adult' XXX video
- 0.3% Blu-Ray / DVD
- 0.3% Cinema

Legend:
- Broadcaster TV
- SVOD / Other AVOD
- YouTube
- TikTok
- Other online video
- Online 'adult' XXX video
- Blu-Ray / DVD
- Cinema

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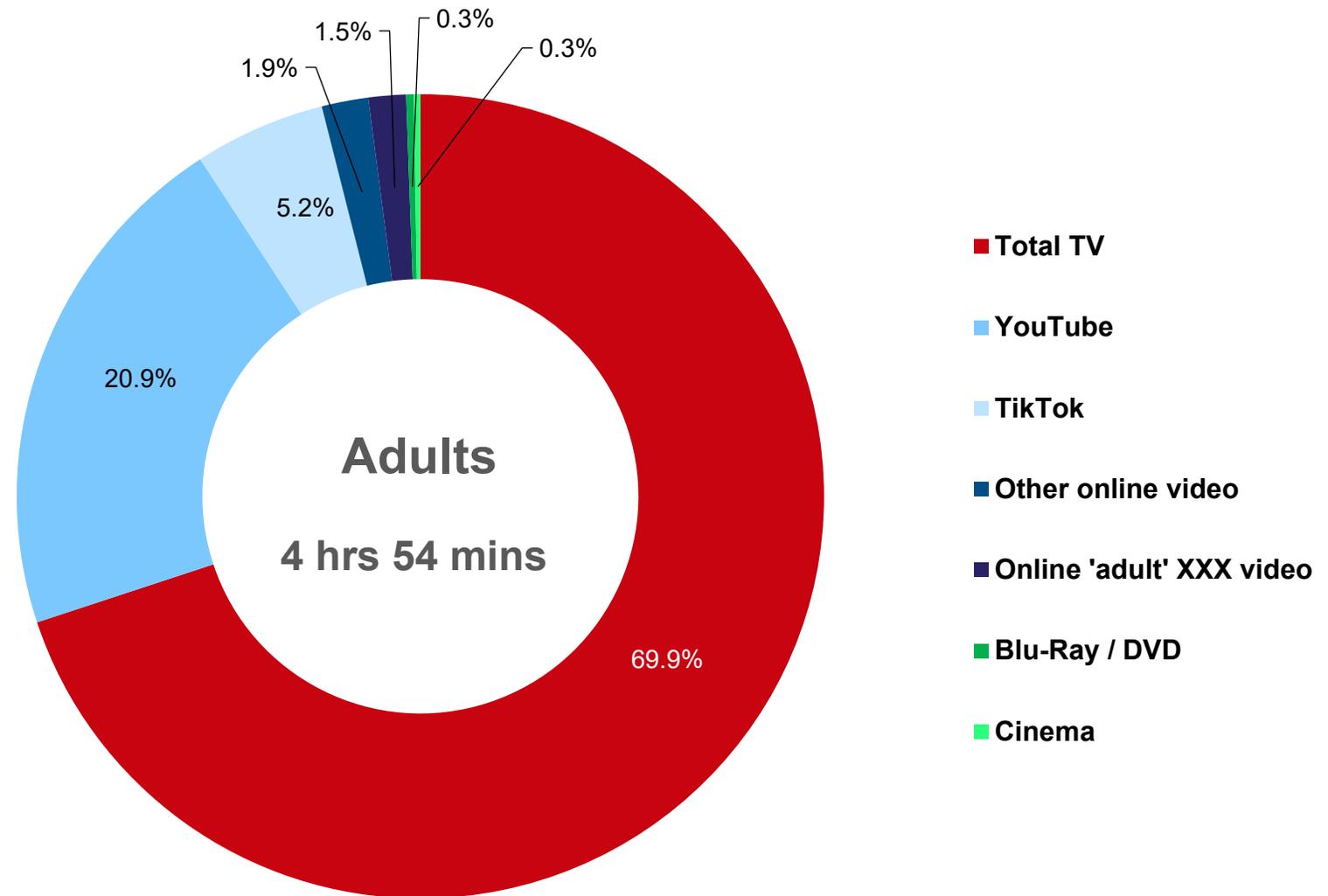
Adults

4 hrs 54 mins

- 69.9% — Total TV
- 20.9% — YouTube
- 5.2% — TikTok
- 1.9% — Other online video
- 1.5% — Online 'adult' XXX video
- 0.3% — Blu-Ray / DVD
- 0.3% — Cinema

Legend:
- ■ Total TV
- ■ YouTube
- ■ TikTok
- ■ Other online video
- ■ Online 'adult' XXX video
- ■ Blu-Ray / DVD
- ■ Cinema

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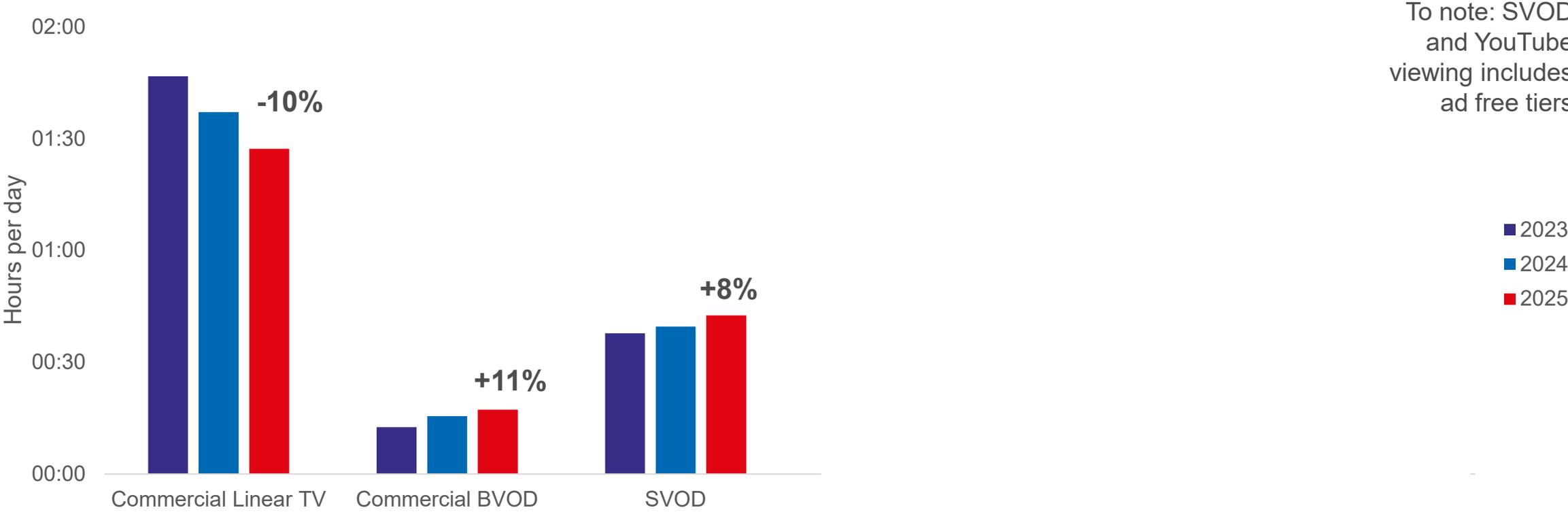
Source: Barb, In home viewing only. All devices, Adults 16+, Total commercial linear TV and BVOD.
% difference based on 25 vs. 24

Little change across the other video areas
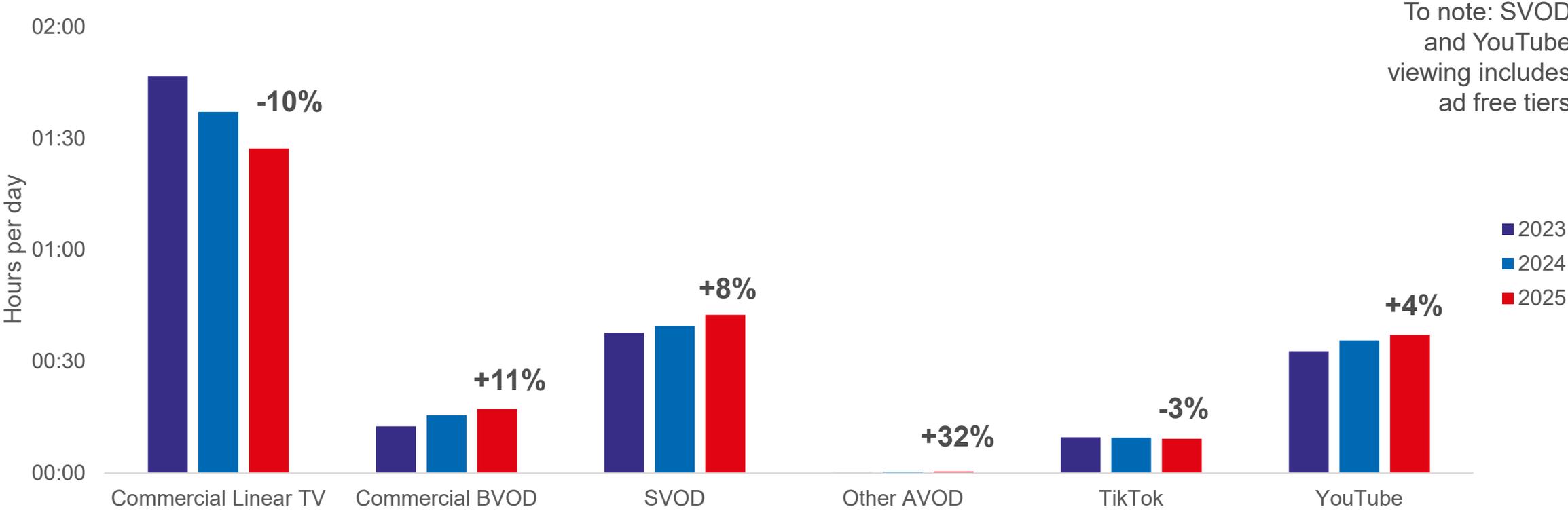
To note: SVOD and YouTube viewing includes ad free tiers

Hours per day

02:00
01:30
01:00
00:30
00:00

Commercial Linear TV: -10%
Commercial BVOD: +11%
SVOD: +8%
Other AVOD: +32%
TikTok: -3%
YouTube: +4%

Legend: 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

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TV sets are the heart of entertainment
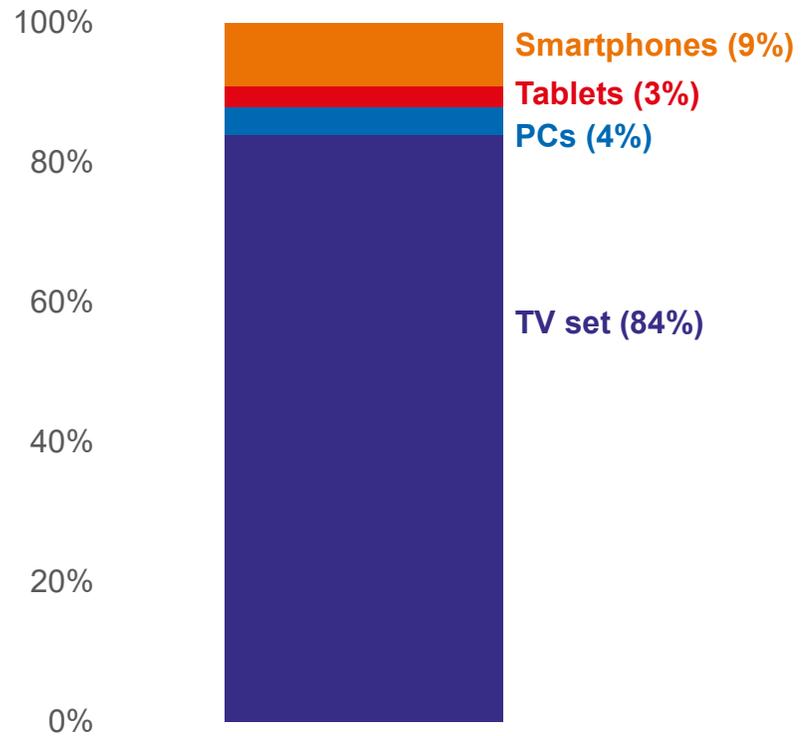
100%

Smartphones (9%)

Tablets (3%)

PCs (4%)

80%

60%

TV set (84%)

40%

20%

0%

U – U Talking To Me?

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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

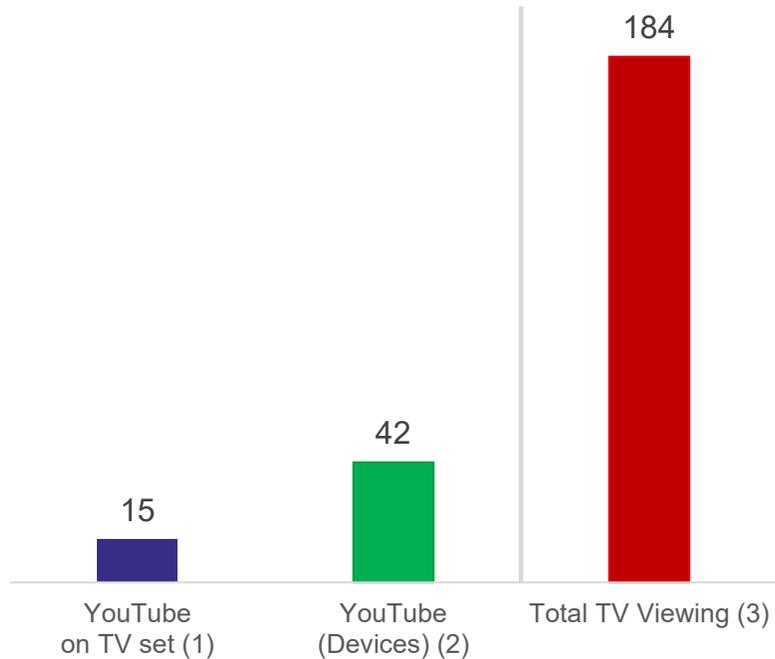| Rank	Channel Group	Programme Title	Average Audience (m)
11	ITV	The 1% Club	8.4
12	BBC	Call the Midwife	8.2
13	BBC	Race Across the World	8.2
14	BBC	Strictly Come Dancing	7.9
15	BBC	Silent Witness	7.9
16	BBC	Death in Paradise	7.9
17	ITV	Playing Nice	7.8
18	Netflix	Wednesday	7.8
19	BBC	Celebrity Race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

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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

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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
5	ITV	I'm a Celebrity... Get Me Out of Here!	9.1	25	UK
6	Netflix	Harlen Coben's Missing You	9.0	1	UK
7	Netflix	Dept. Q	8.8	1	UK
8	Channel 4	The Great British Bake Off	8.6	16	UK
9	ITV	Vera	8.5	14	UK
10	ITV	Unforgotten	8.4	6	UK

Rank	Channel Group	Programme Title	Average Audience (m)	Series	Origin
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12	BBC	Call the Midwife	8.2	14	UK
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).

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What about
YouTube?

British Gas - PeakSave

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YouTube is less than a third the size of TV

Millions of hours per day

15	42	184
YouTube on TV set (1)	YouTube (Devices) (2)	Total TV Viewing (3)

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

Sky Mobile – Keep Rollin
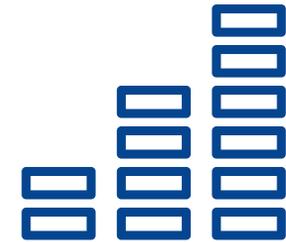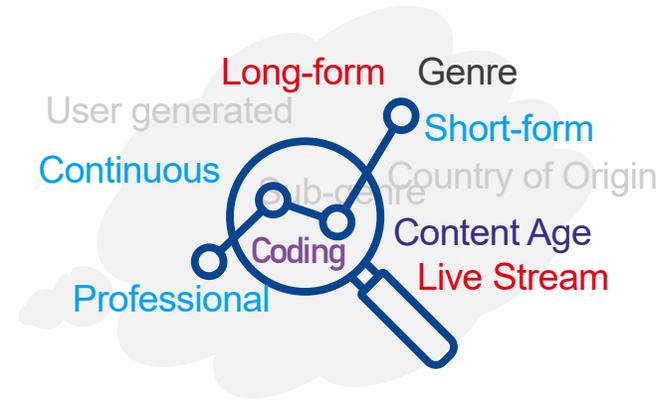
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YouTube takes a month to deliver TV's daily reach

millions

30	
25	**TV Reach** **DAILY**
20	**YouTube reach** **MONTHLY**
15	
10	
5	
0	

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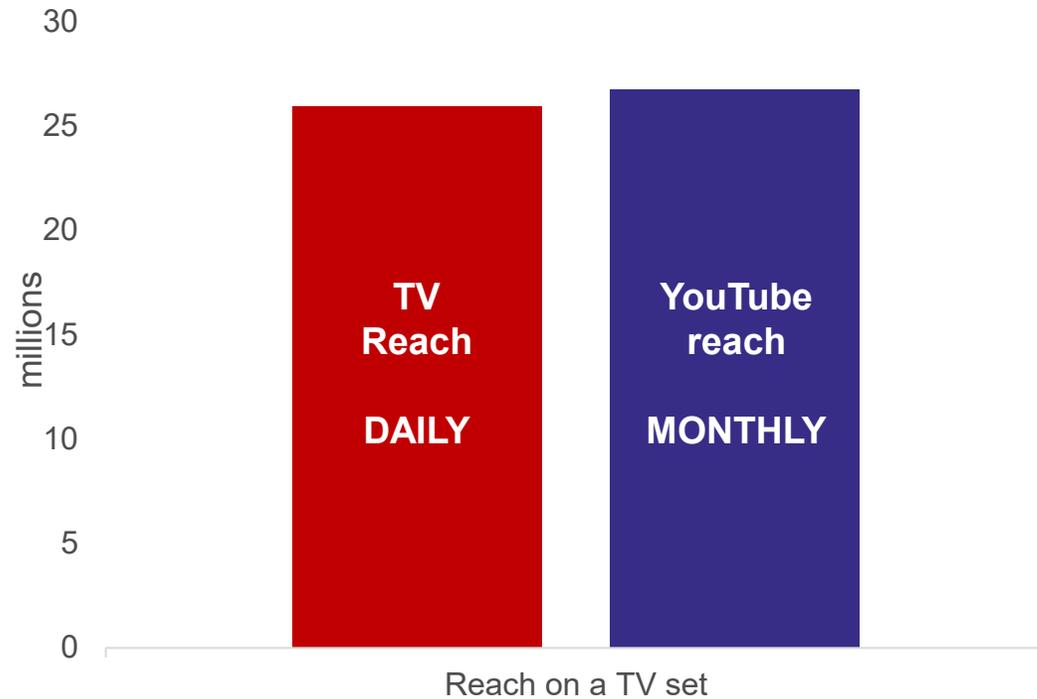
Source: Barb, YouTube & Commercial Broadcaster reach (3+ mins continuous), TV screens, Adults 16+

Bath & Body Works - All Aboard

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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

Most content consumed on YouTube is <u>not</u> "TV-like"
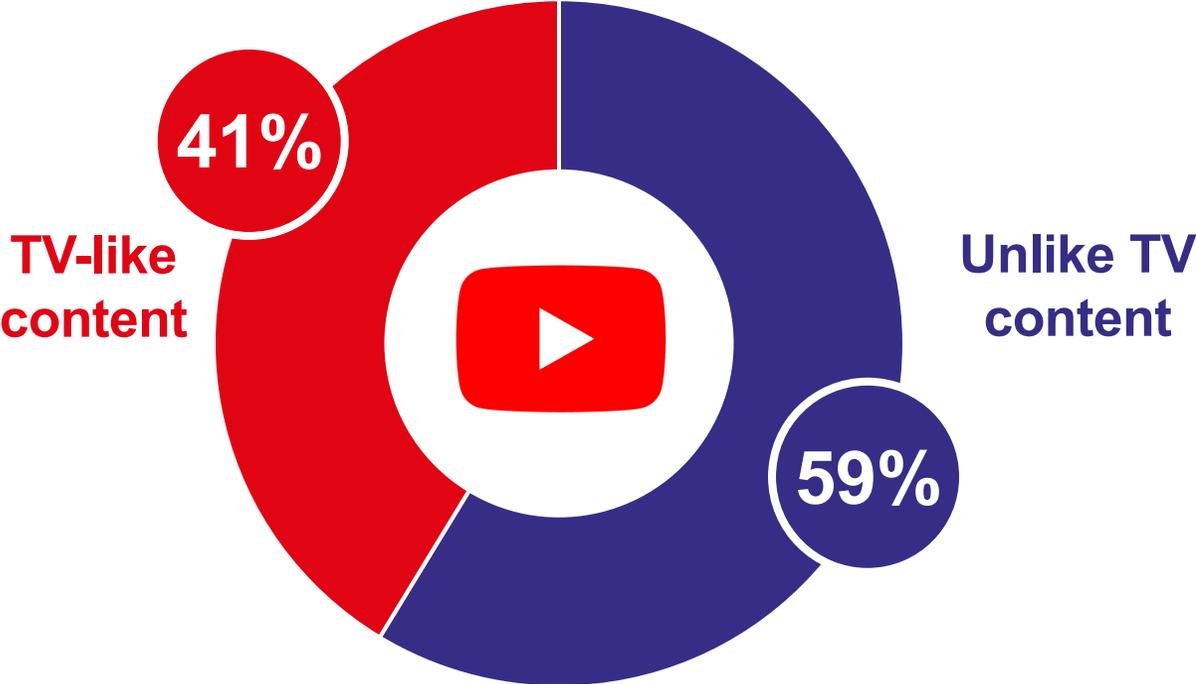
TV-like content — 41%

Unlike TV content — 59%

"Unlike TV" is a mishmash of content

TV-like content **41%**

Unlike TV content **59%**

%	Category
34%	Everything else
4%	Food
4%	Podcast
5%	Reaction
6%	Review / recommendation
7%	Factual
10%	Reddit
15%	Entertainment
16%	Gaming

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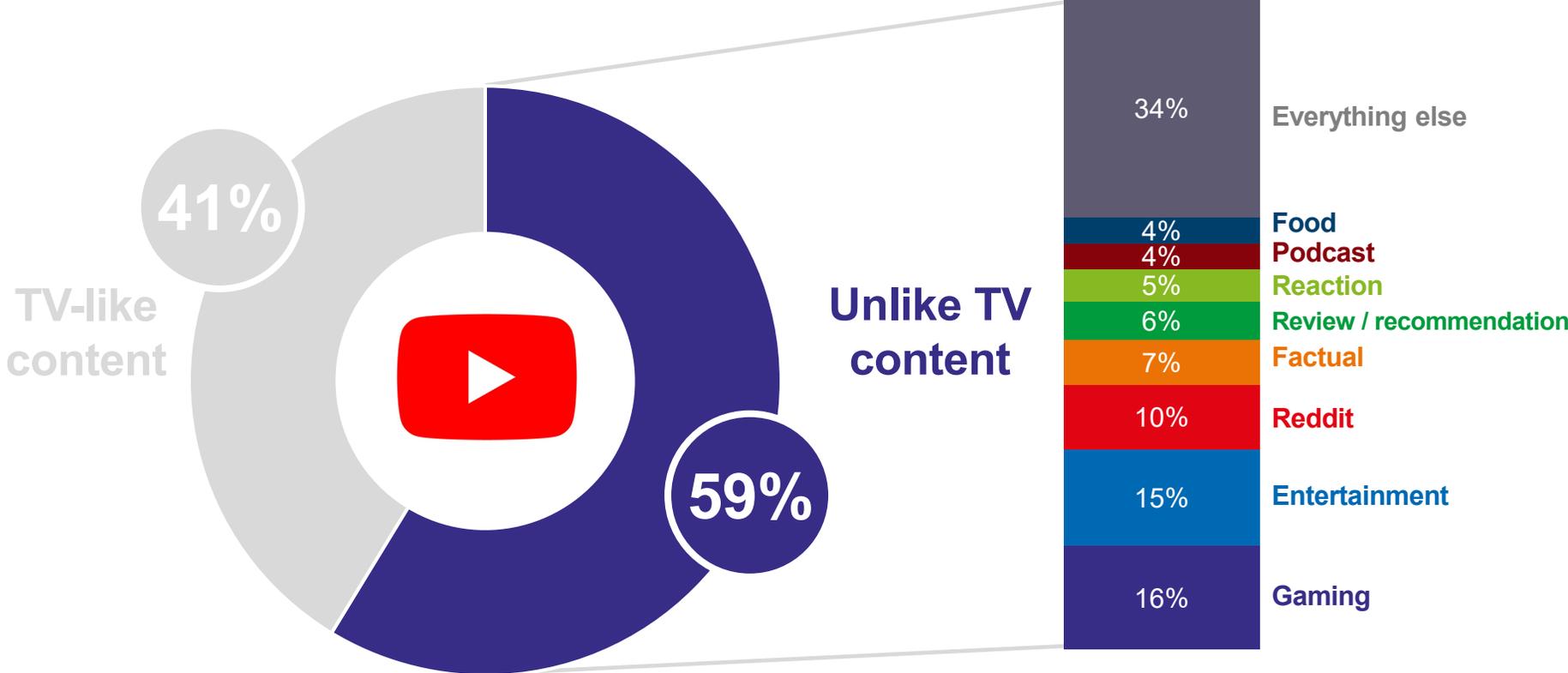
"TV-like" is predominantly music, TV and films

Category	%
Other	4%
Kids	3%
News	7%
Sport	8%
Hobbies / Leisure	9%
TV/Film Clips	19%
Music	51%

41% — TV-like content

59% — Unlike TV content

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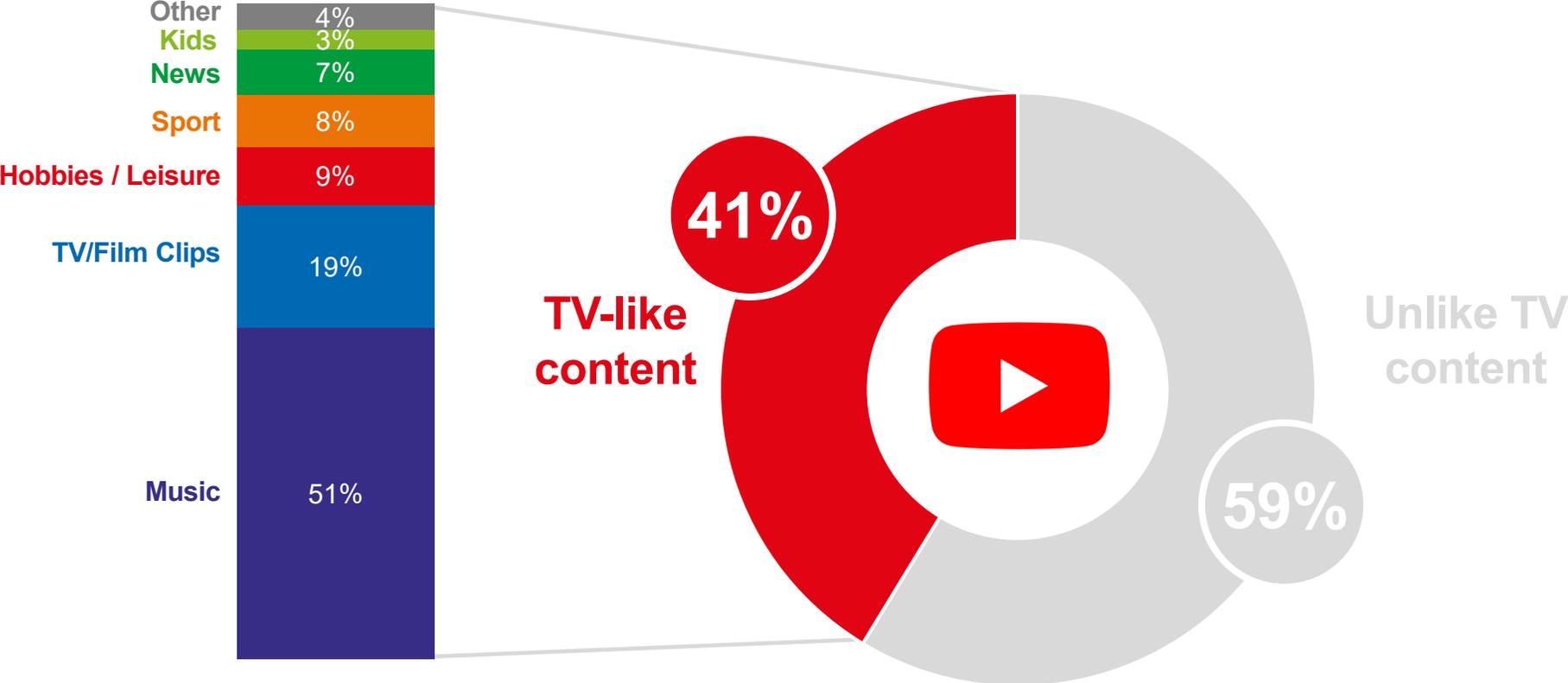
YouTube is heavily audio

Top YouTube content owners by reach – Dec 25
Traditional British broadcasters feature strongly along with music content providers

UKOM

	YouTube Reach (%)	YouTube Audience (000s)
Universal Music Group N.V.	30	15,649
Warner Music UK Limited	26	13,856
Sony	25	12,957
HAAWK	23	12,219
Vevo	18	9,353
BBC Corporation	18	9,288
The Orchard Music	17	9,110
AdRev	16	8,371
ITV Plc	14	7,246
Sky	13	6,975
Believe	11	6,007
S71 UK Creators	11	5,920
Ingrooves	9	4,918
Create Music	9	4,627
Little Dot Studios	9	4,503
BMG Rights Management	8	4,450
NBC	8	4,307
Channel4	7	3,754
Endemol Shine Group	7	3,543
FremantleMedia Enterprises	7	3,529

Source: UKOM endorsed data for PC, Tablet and Smartphone in Ipsos iris, December 2025
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

Ipsos

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Most people don't watch much YouTube

2 hours 1-min per day
Heaviest 25%
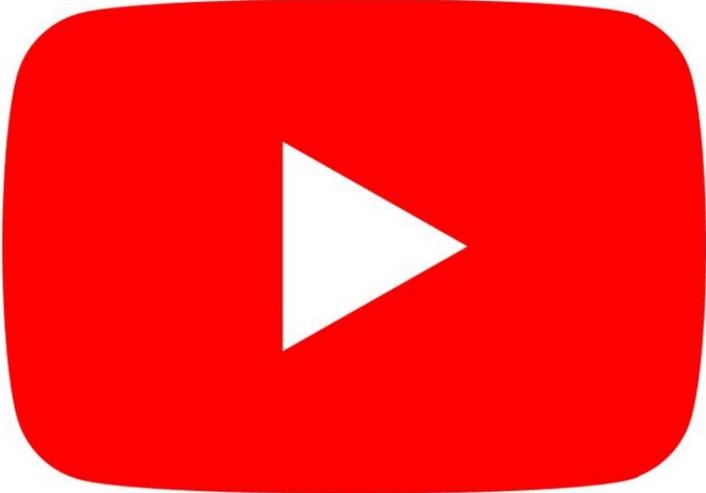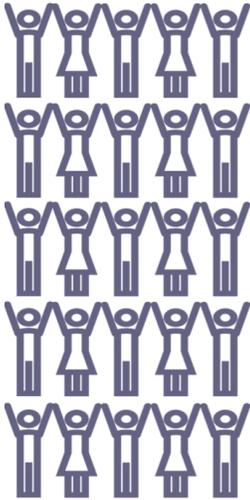
6-mins per day
The other 75%

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Who are the YouTube superfans?

2 hours 1-min per day
Heaviest 25%

Under 10	10 - 15	16 - 24	25 - 34	35 - 44	45 - 54	55+
198	179	92	116	118	91	55

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YouTube's biggest fans love TV even more

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

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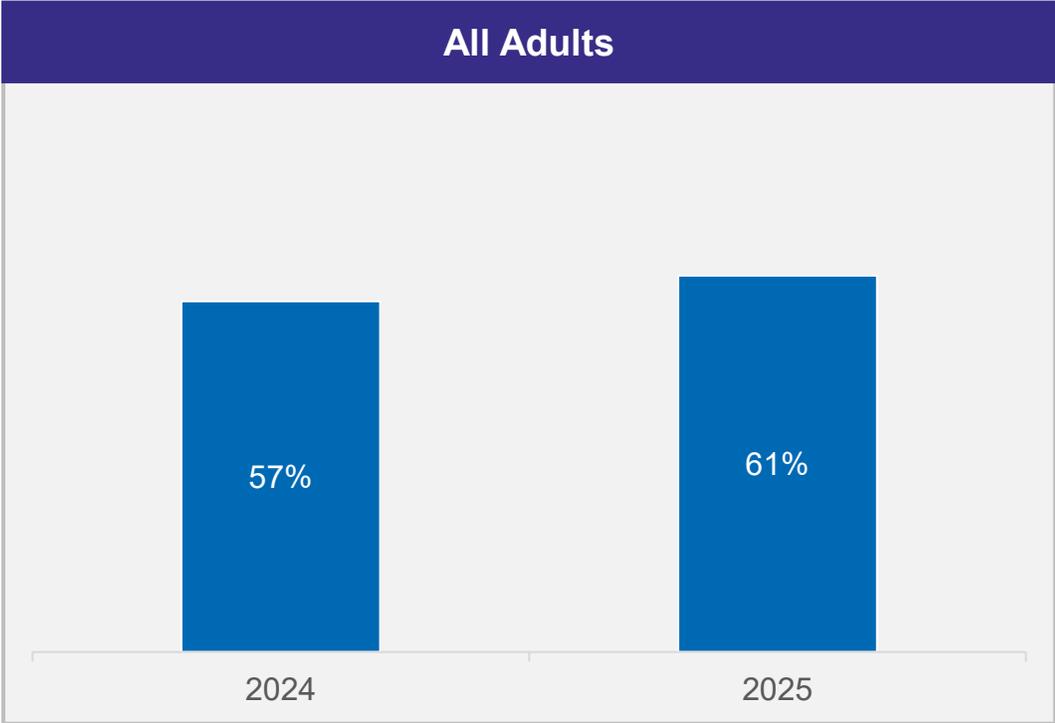# The longer the YouTube ad, the more of it is skipped
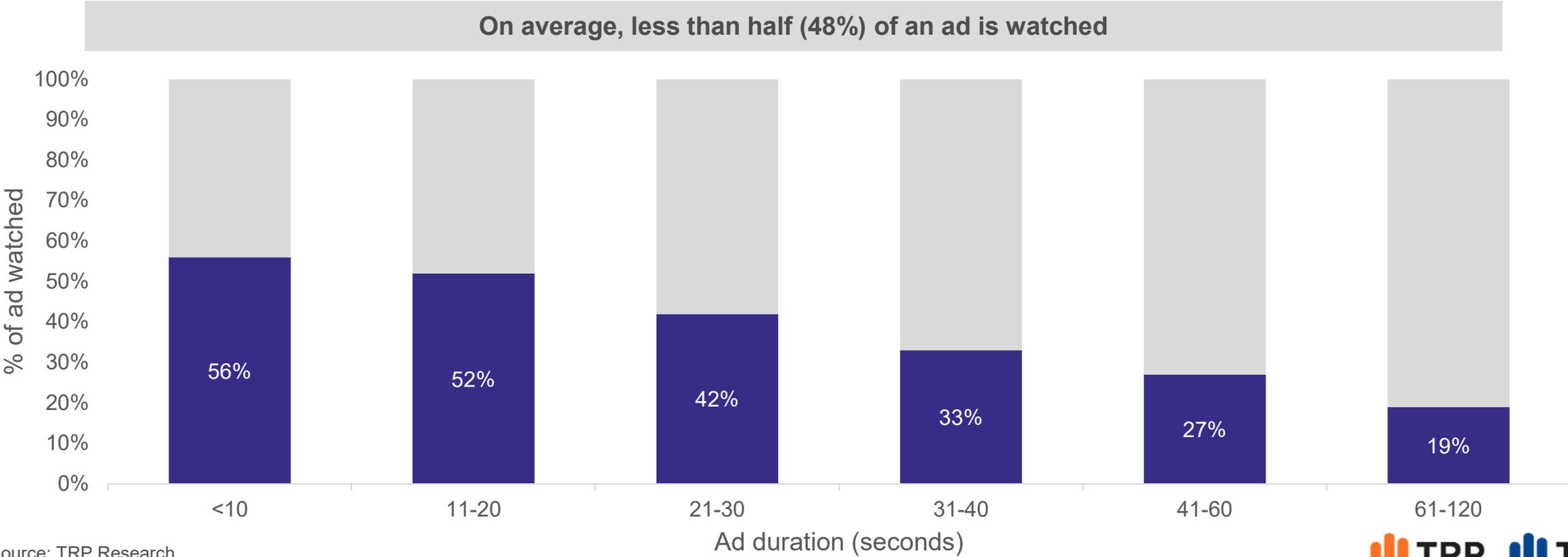
On average, less than half (48%) of an ad is watched

% of ad watched

	<10	11-20	21-30	31-40	41-60	61-120
	56%	52%	42%	33%	27%	19%

Ad duration (seconds)

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Advertising Time

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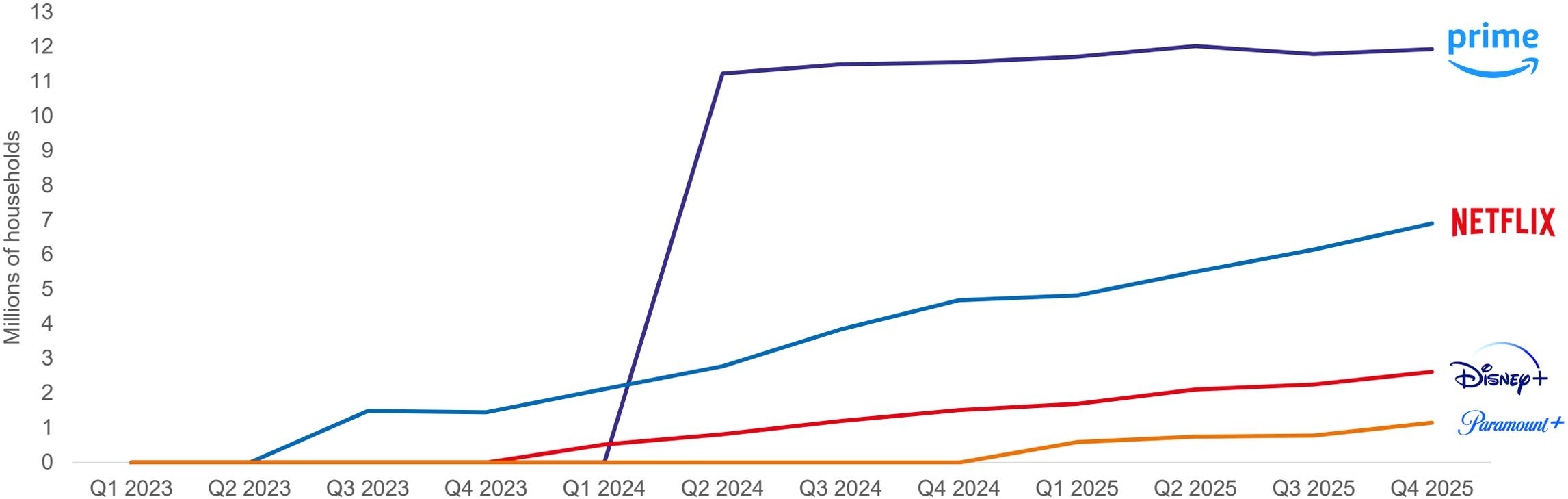
Now even easier to reach audiences with TV advertising

All Adults

2024: 57%
2025: 61%

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
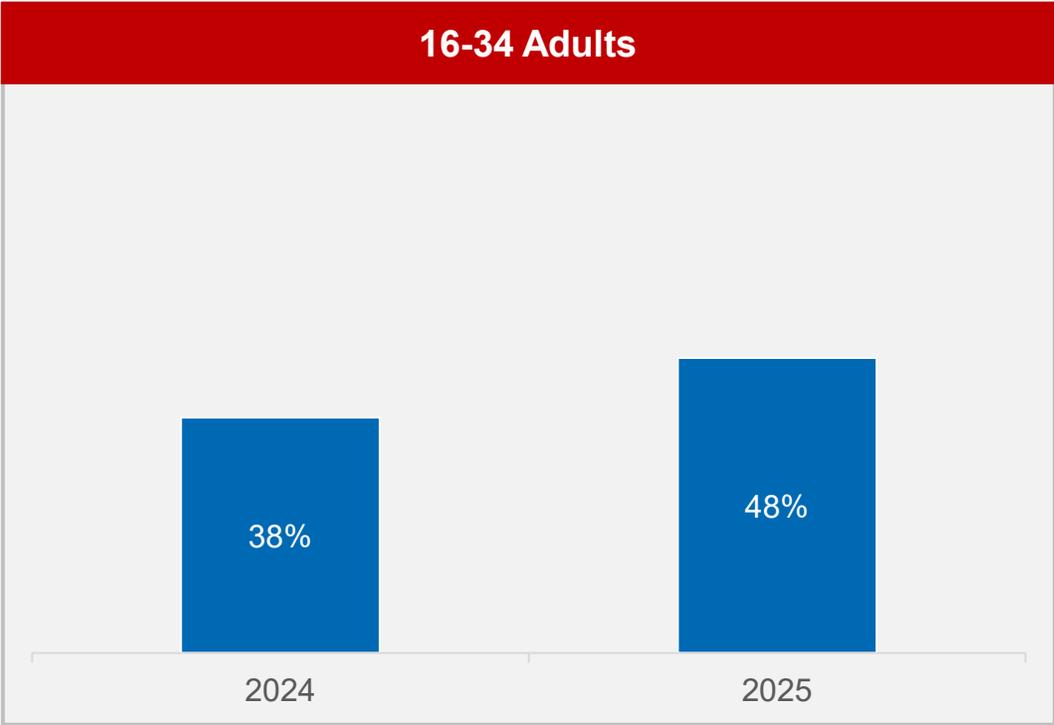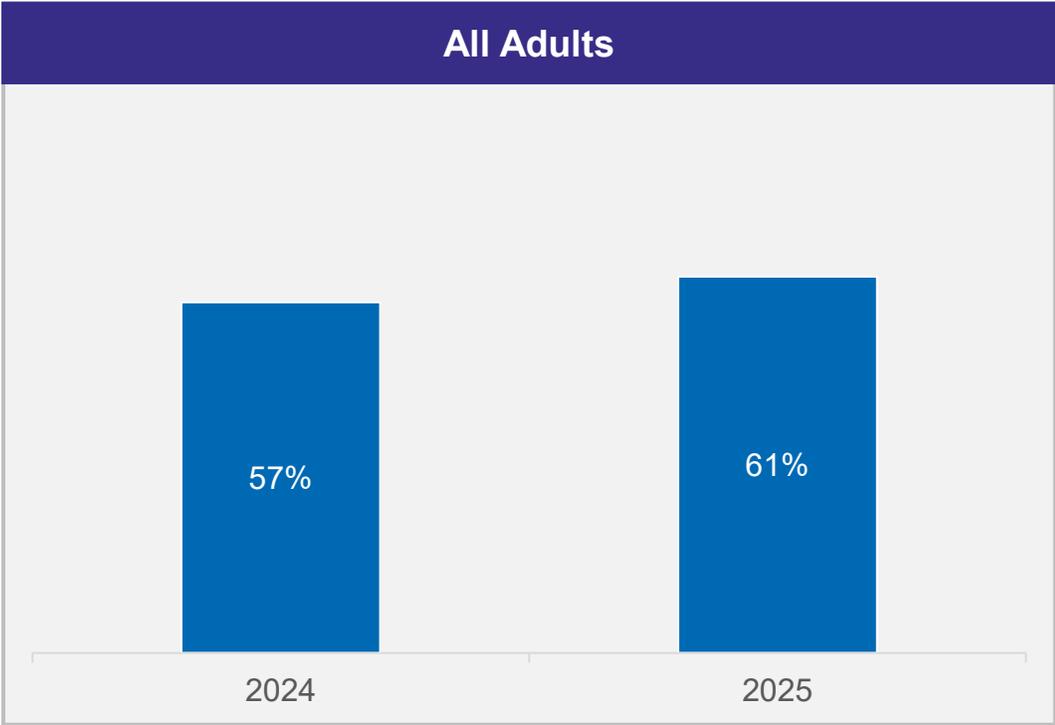
All Adults

	2024	2025
	57%	61%

16-34 Adults

	2024	2025
	38%	48%

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

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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).

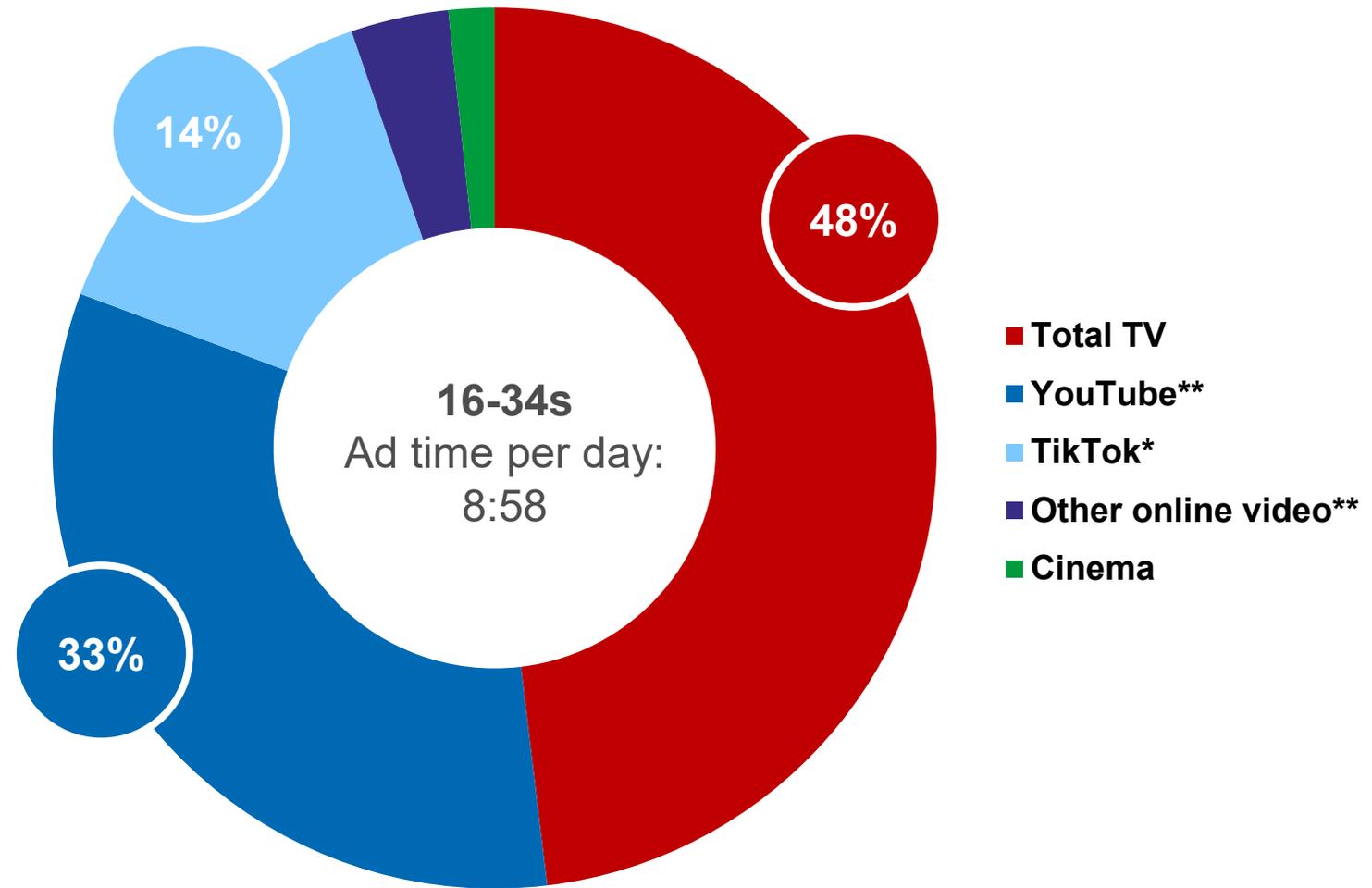thinkbox

Total TV accounts for 85% of all AV advertising time
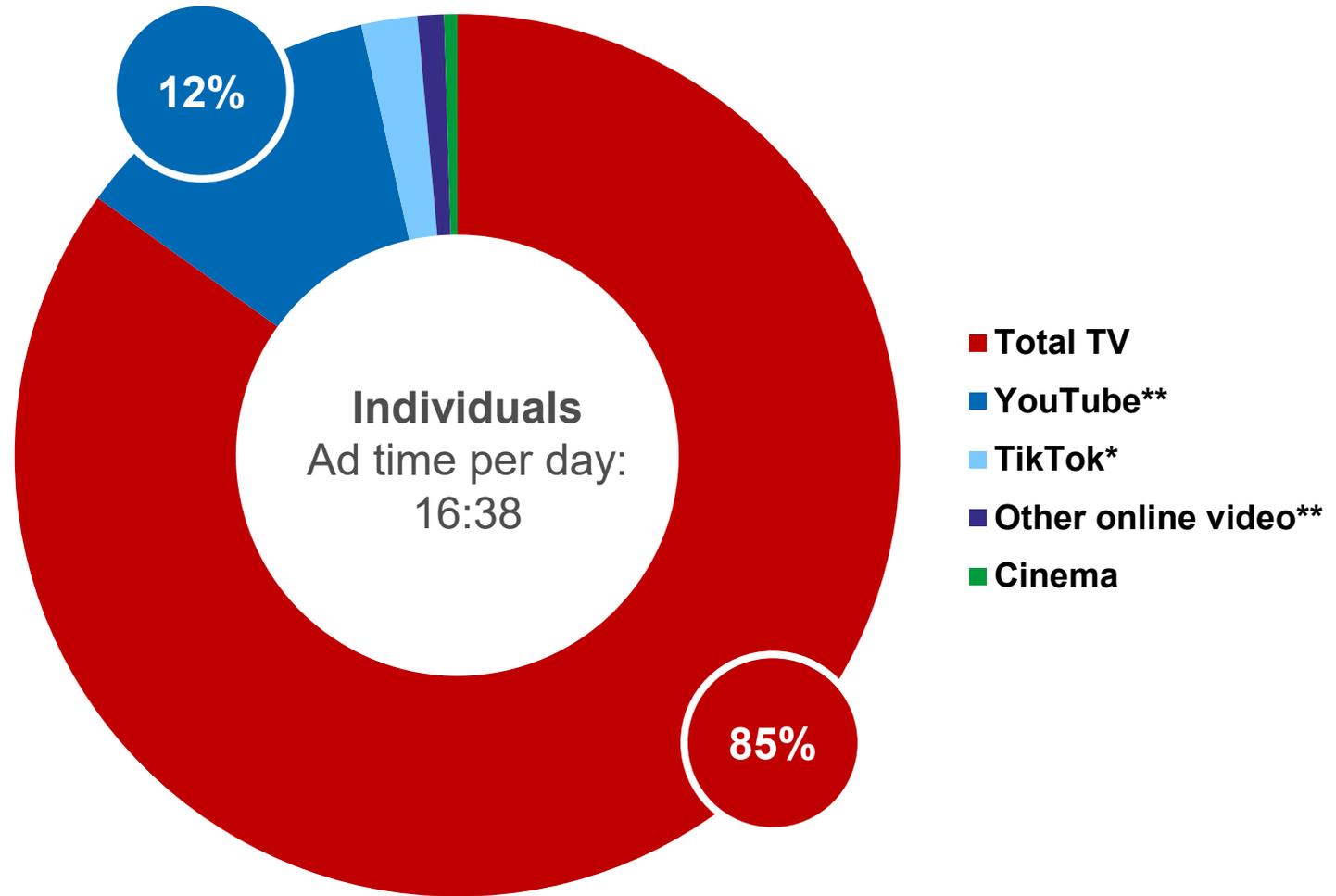
Individuals
Ad time per day:
16:38

12%

85%

Legend:
- ■ Total TV
- ■ YouTube**
- ■ TikTok*
- ■ Other online video**
- ■ Cinema

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

16-34s
Ad time per day:
8:58

48%

33%

14%

- ■ Total TV
- ■ YouTube**
- ■ TikTok*
- ■ Other online video**
- ■ Cinema

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Where your advertising is seen matters
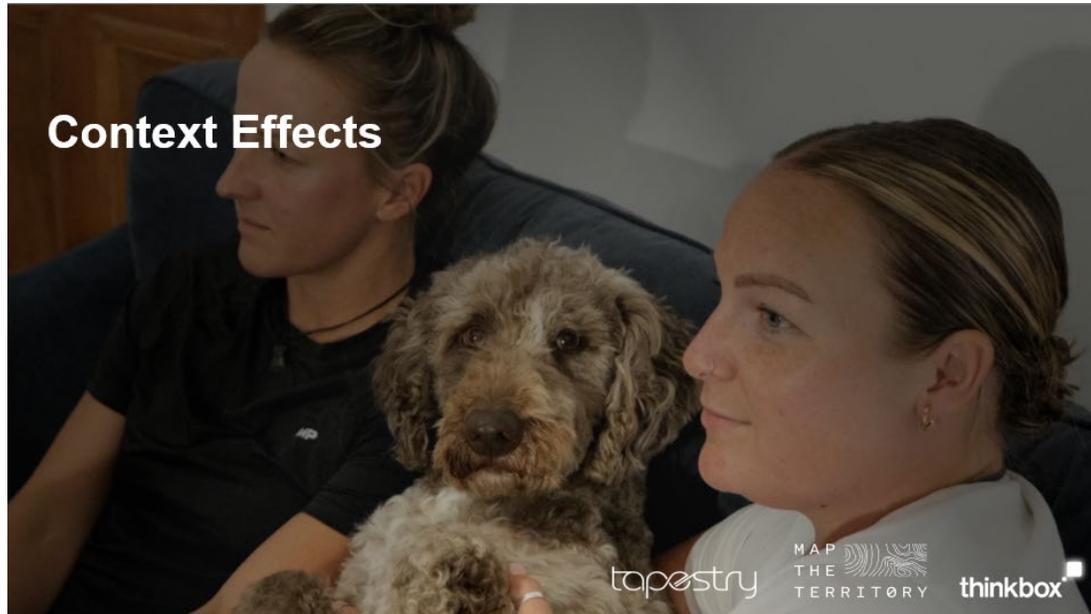
What factors impact advertising recall?

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

tapestry | thinkbox

Not all advertising contexts deliver the same impact

📺	**Big screen**
🎬	**Professionally produced content**
🛋	**Location**
🙂	**Mood**
🎯	**Occasion satisfaction**
👥	**Shared viewing**

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Not all advertising contexts deliver the same impact

📺	**Big screen**
🎬	**Professionally produced content**
🛋️	**Location**
😊	**Mood**
🎯	**Occasion satisfaction**
👥	**Shared viewing**

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Shared TV viewing occasions drive ad performance

+23% higher ad recall

+15% higher brand trust

+75% greater liking of the TV ads

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Shared viewing happens in all TV genres

Entertainment

Drama

Sport

Documentaries

Films

News/Weather

Current Affairs

Hobbies/Leisure

Music

Children

Other

TV Films

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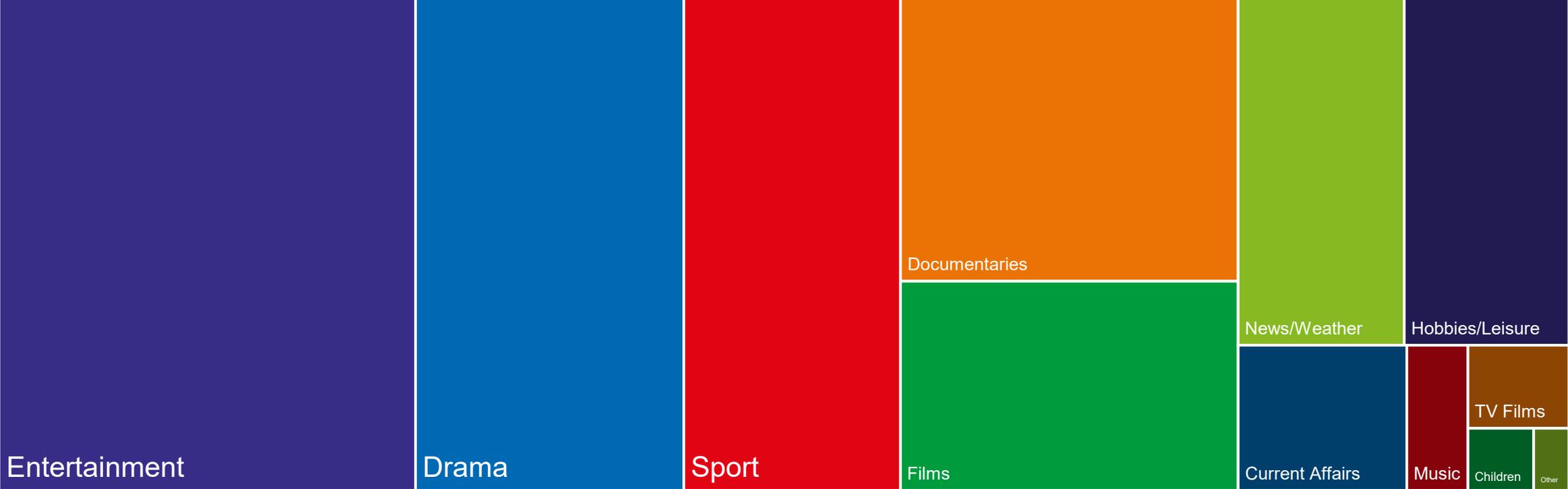
TV shows that brought people together

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%

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In summary…

The world hasn't changed as much as we think	The growth of VOD continues	YouTube consumption highly skewed	Context is key for commercial impact
TV remains dominant	Total TV ad opportunities are increasing	Heavy YouTube viewers watch more TV than YouTube	Shared viewing is actionable

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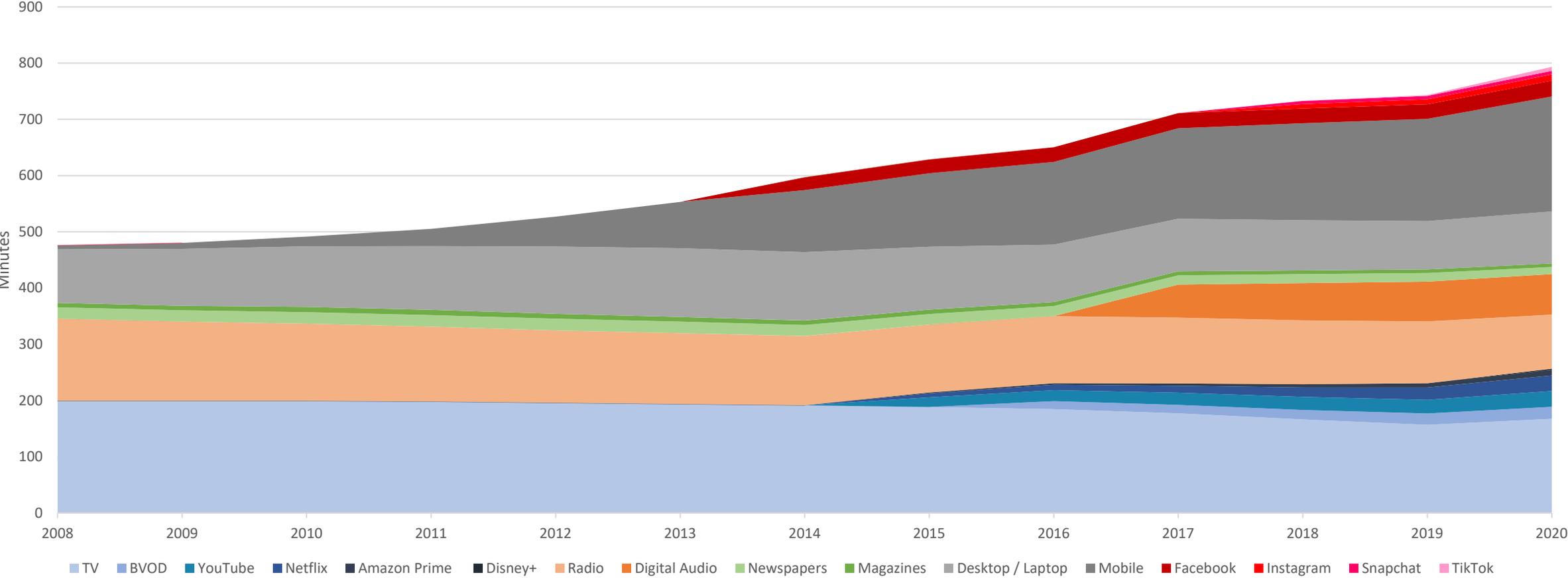# Chapter 3:
Cutting through the chaos

Elliott Millard, Chief Strategy Officer, Thinkbox
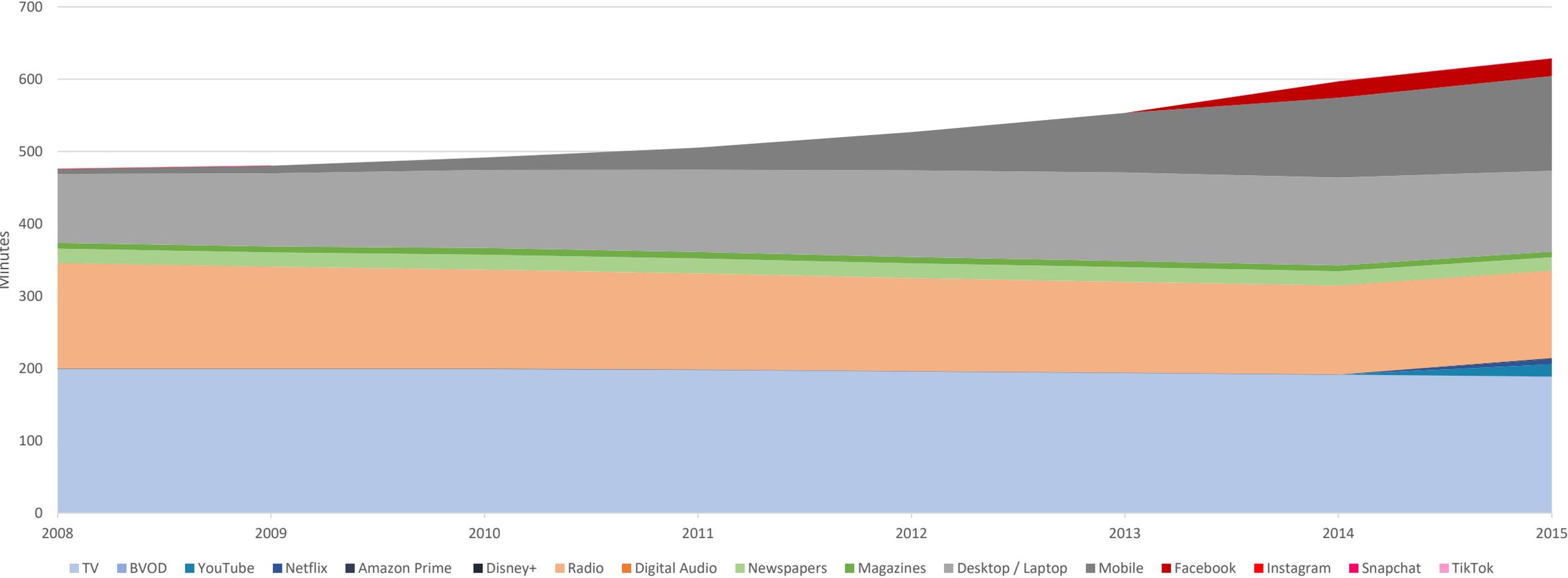
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Remember when life was simple?

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

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Remember when life was simple?

Legend: TV, BVOD, YouTube, Netflix, Amazon Prime, Disney+, Radio, Digital Audio, Newspapers, Magazines, Desktop / Laptop, Mobile, Facebook, Instagram, Snapchat, TikTok
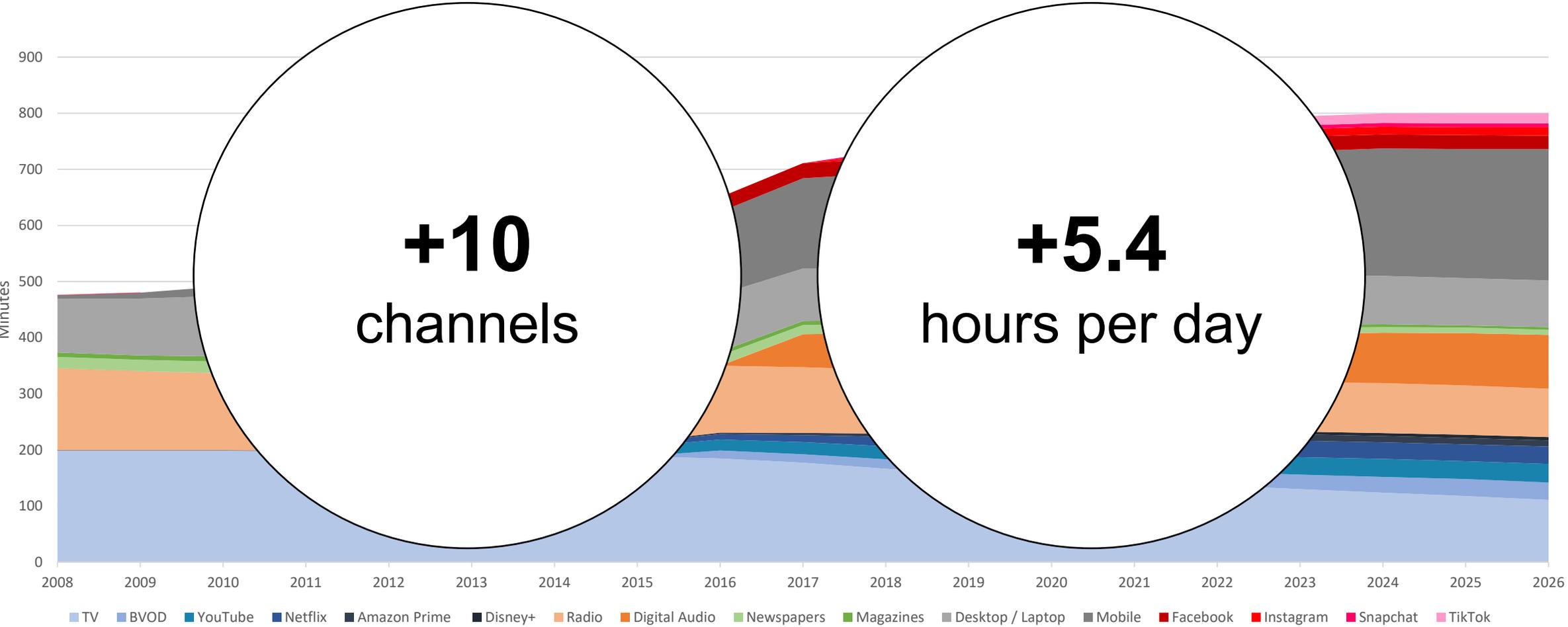
Y-axis: Minutes (0 to 900)
X-axis: 2008 to 2020

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

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Remember when life was simple?
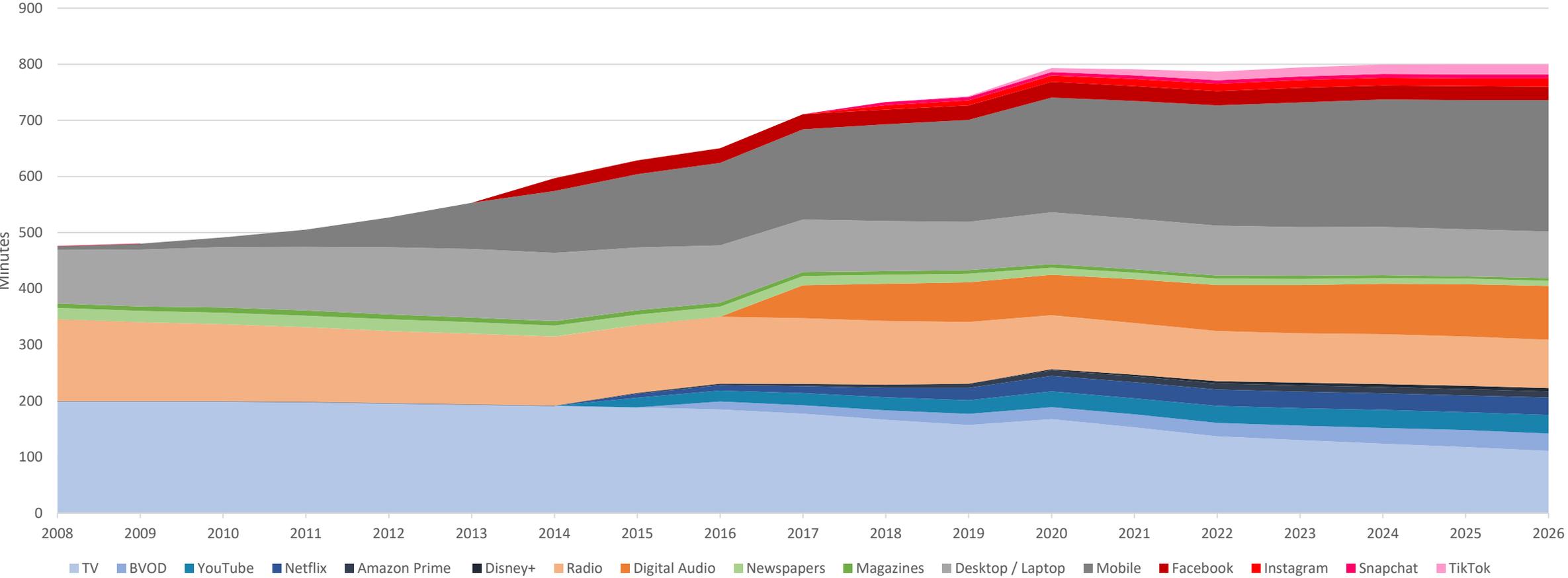
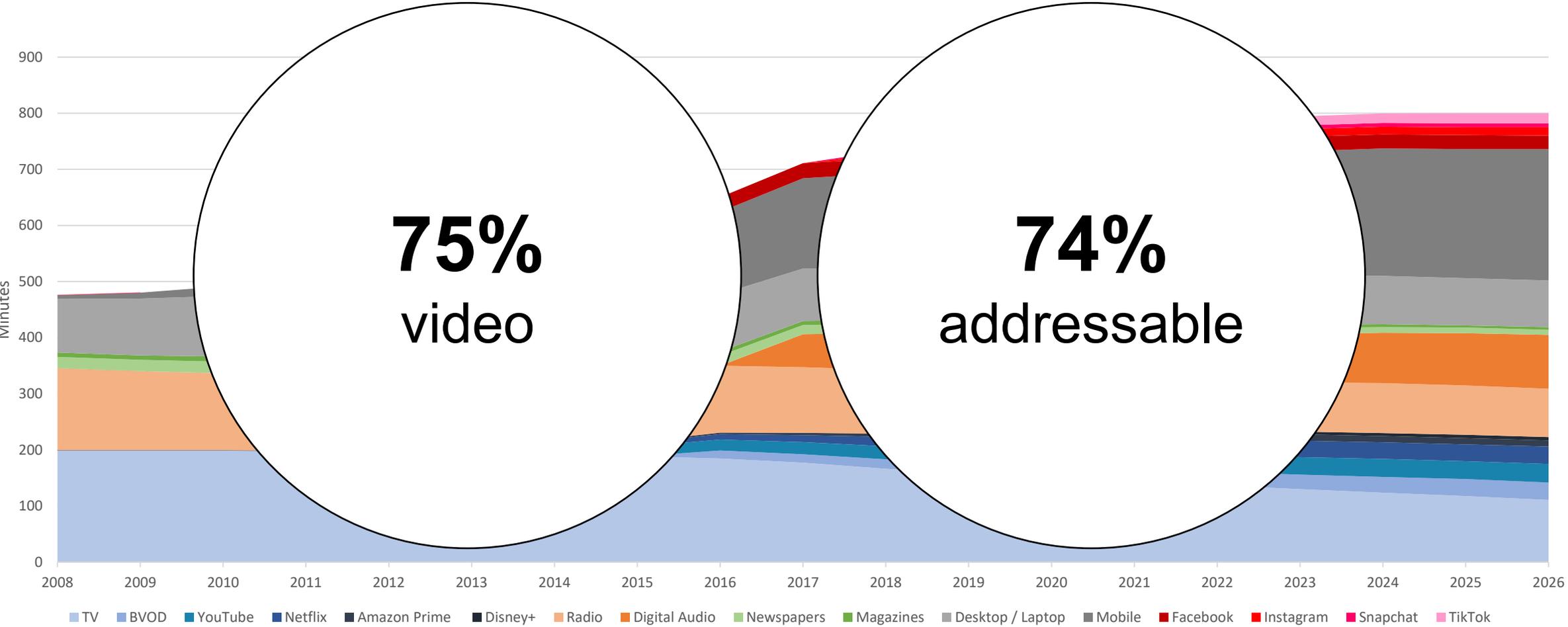Source: eMarketer, time spent with media per day 2008 - 2026

More channels, more time

+10 channels

+5.4 hours per day

Minutes

900
800
700
600
500
400
300
200
100
0

2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 2025 2026

TV BVOD YouTube Netflix Amazon Prime Disney+ Radio Digital Audio Newspapers Magazines Desktop / Laptop Mobile Facebook Instagram Snapchat TikTok

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

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Everything is video, everything is addressable

75% video

74% addressable

Minutes

900
800
700
600
500
400
300
200
100
0

2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 2025 2026

TV · BVOD · YouTube · Netflix · Amazon Prime · Disney+ · Radio · Digital Audio · Newspapers · Magazines · Desktop / Laptop · Mobile · Facebook · Instagram · Snapchat · TikTok

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

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Why did video eat everything?

McDonalds – All Flavour, No Mess

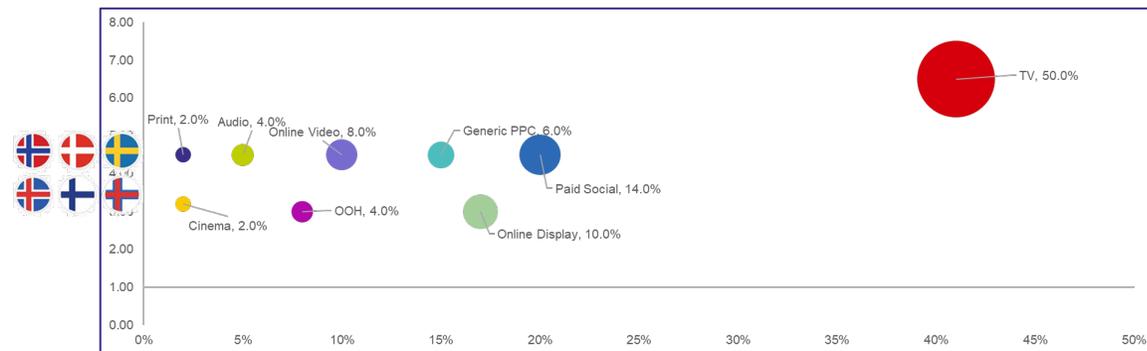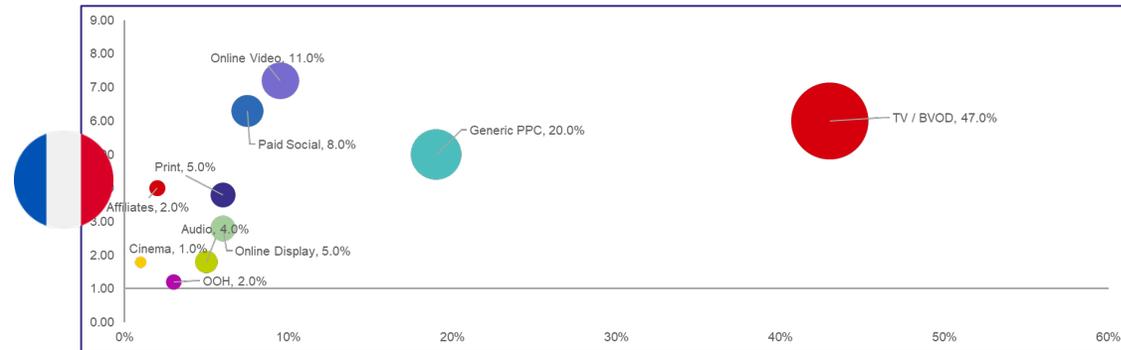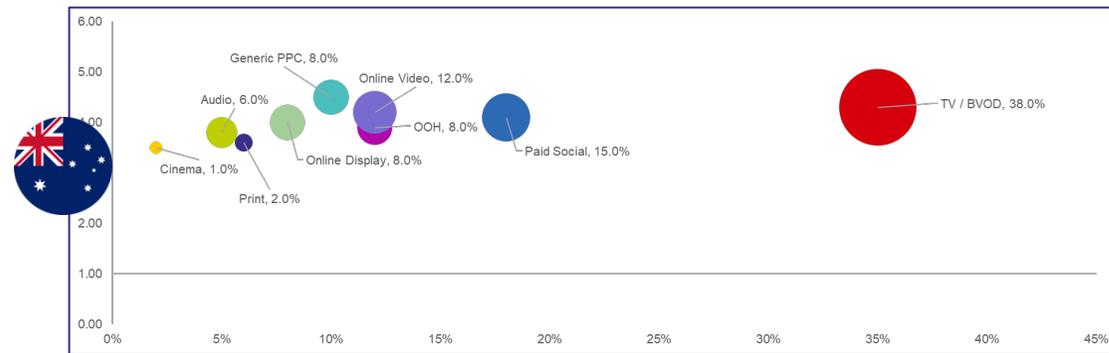# Movement makes us pay attention
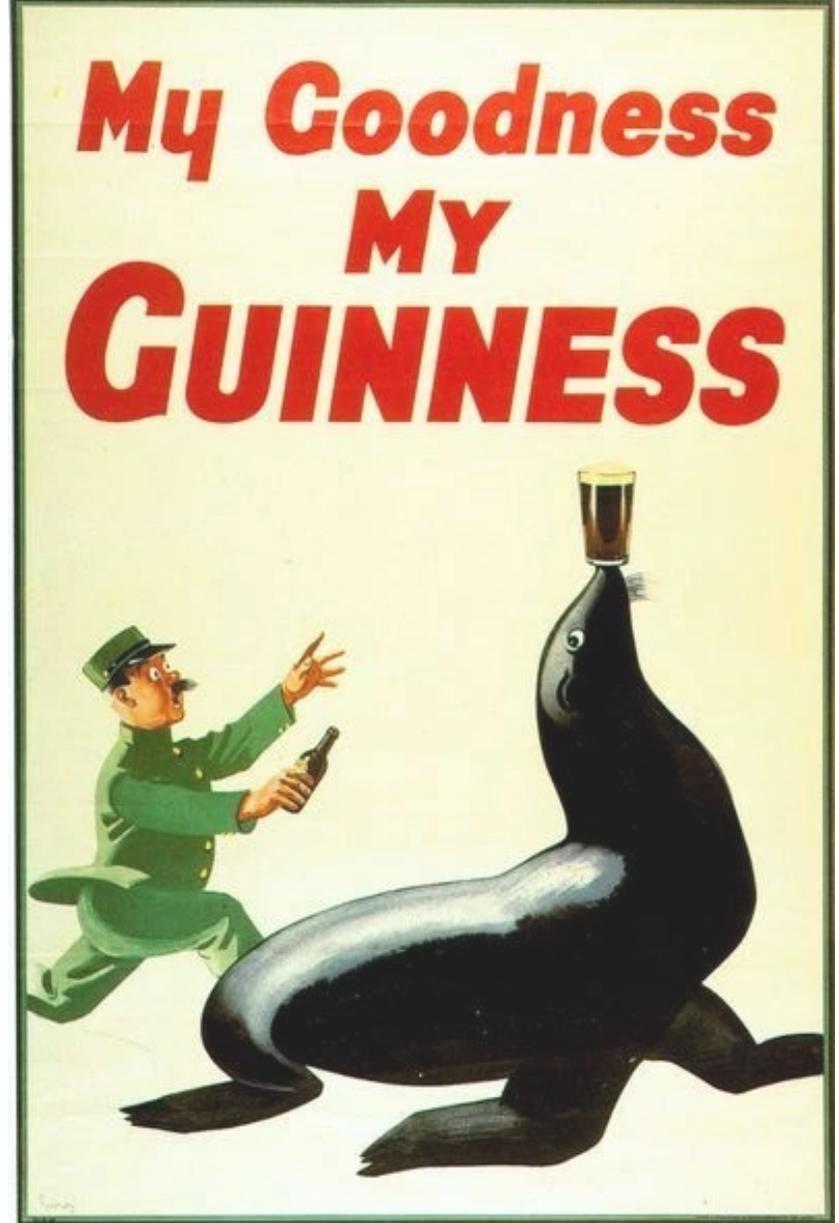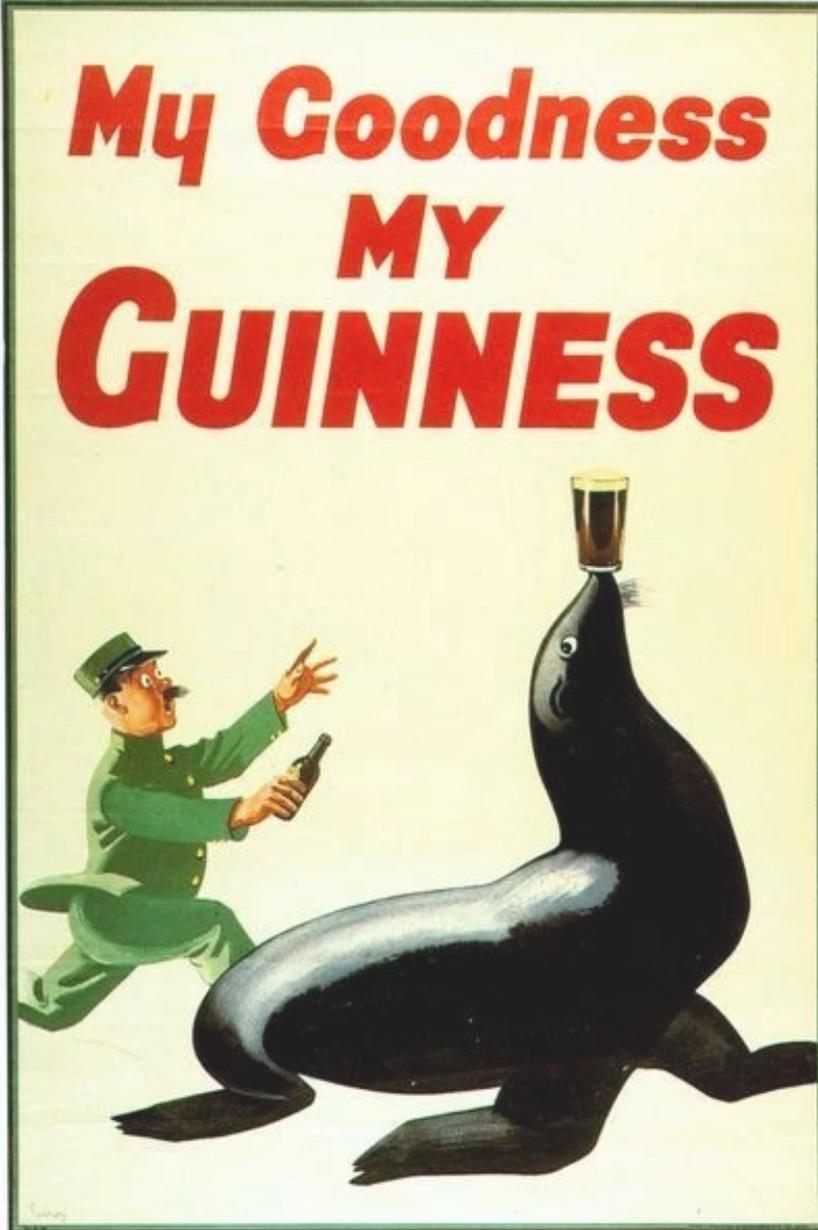
And video <u>works</u>

We know that Total TV is powerful

Full profit volume & profit ROI
Bubble size represents % of full profit volume
Overall Full Profit ROI: £4.11

Profit ROI (£) — vertical axis: 0.00 to 8.00

% of Spend — horizontal axis: 0% to 60%

- Print, 4.8%
- Audio, 6.9%
- Online Video, 3.4%
- Generic PPC, 14.6%
- OOH, 3.1%
- Cinema, 0.3%
- Online Display, 2.9%
- Paid Social, 9.4%
- Total TV, 54.7%
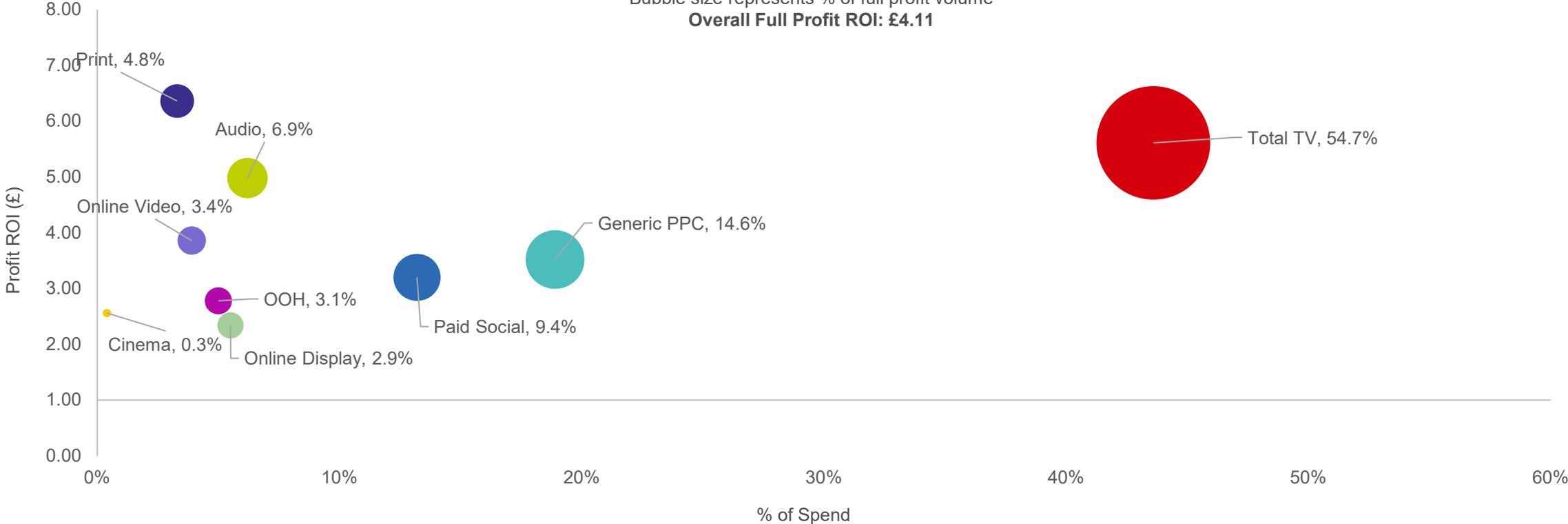
Source: Profit Ability 2, April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.
Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK

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And that there is something consistent about that power

Chart 1 (Australia): Generic PPC, 8.0%; Online Video, 12.0%; TV / BVOD, 38.0%; Audio, 6.0%; OOH, 8.0%; Cinema, 1.0%; Online Display, 8.0%; Print, 2.0%; Paid Social, 15.0%

Chart 2 (France): Online Video, 11.0%; TV / BVOD, 47.0%; Paid Social, 8.0%; Generic PPC, 20.0%; Print, 5.0%; Affiliates, 2.0%; Audio, 4.0%; Cinema, 1.0%; Online Display, 5.0%; OOH, 2.0%

Chart 3 (Nordics): TV, 50.0%; Print, 2.0%; Audio, 4.0%; Online Video, 8.0%; Generic PPC, 6.0%; Paid Social, 14.0%; Cinema, 2.0%; OOH, 4.0%; Online Display, 10.0%

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.

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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"
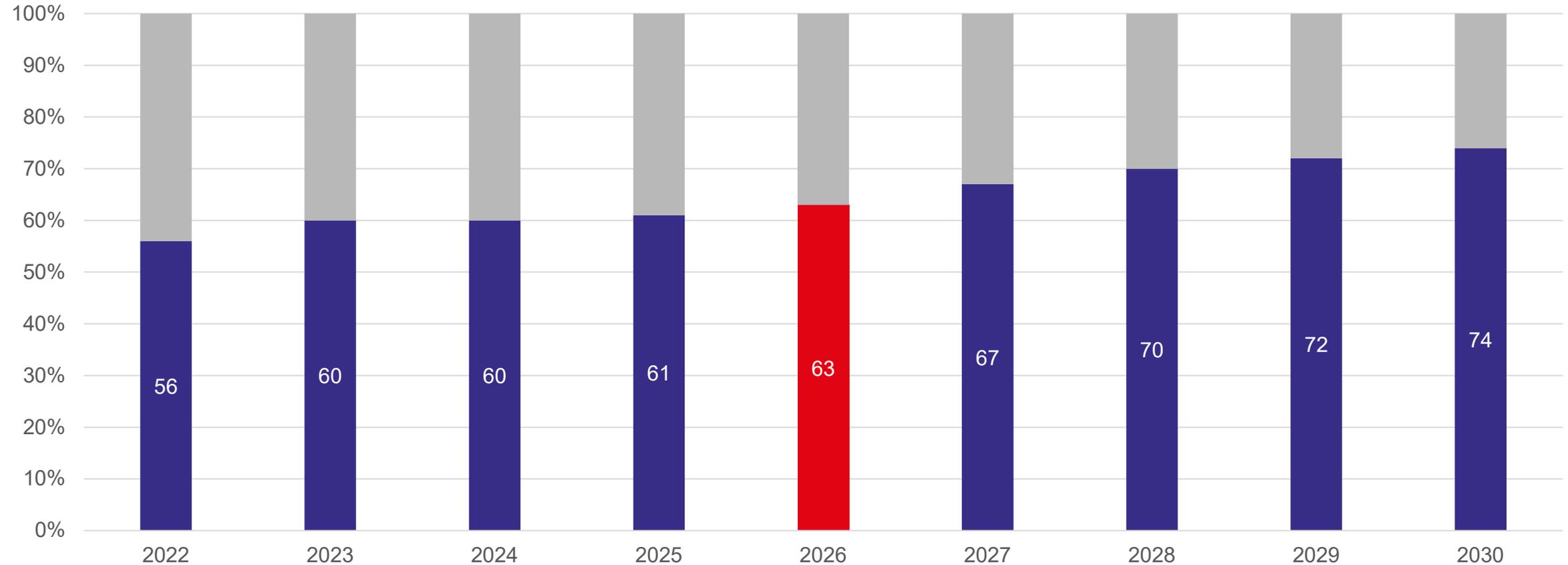
thinkbox
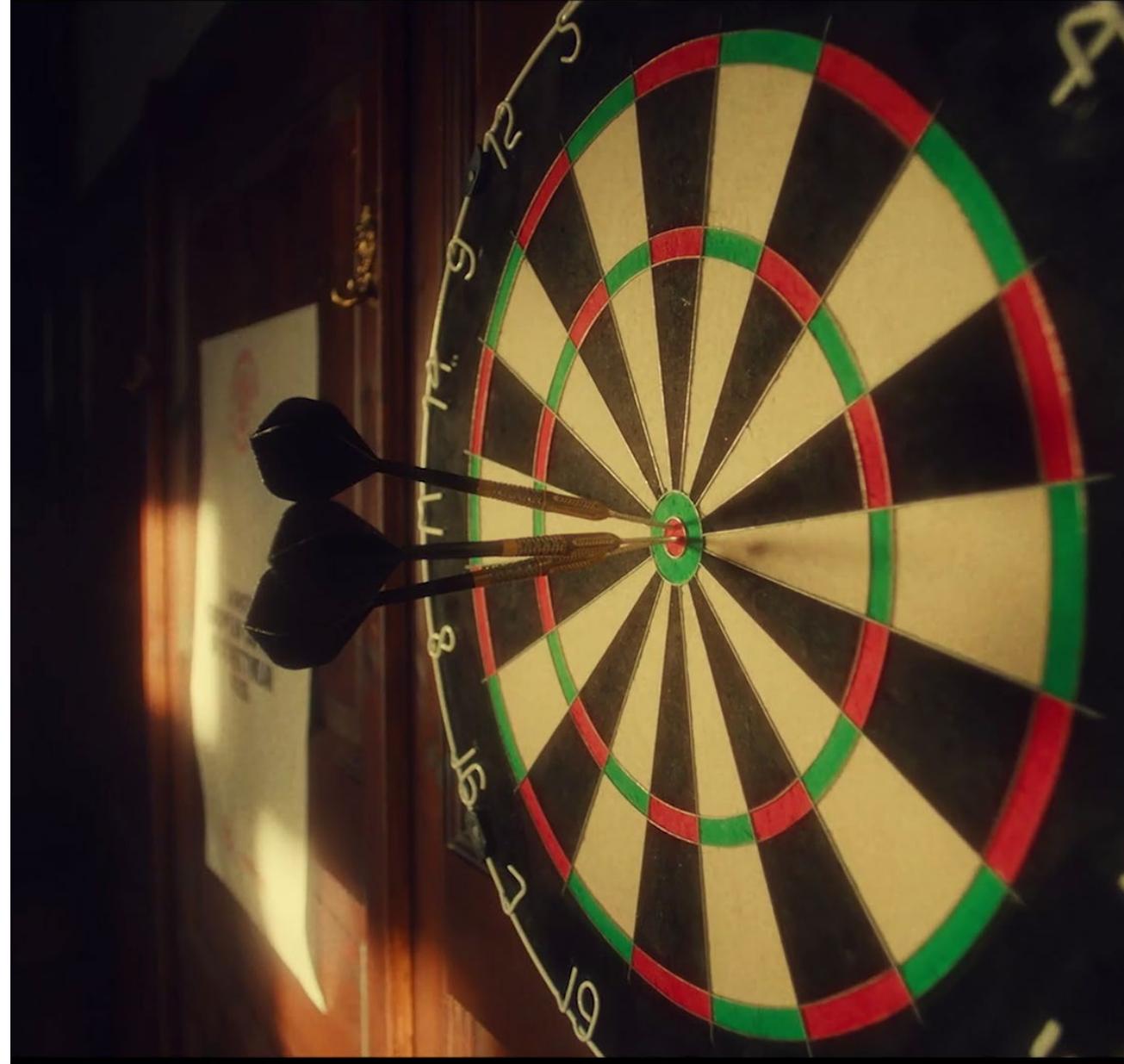
Not all addressable advertising is created equal

Warburtons – The Inspection

Addressable TV has come of age

Source: 3Reasons

Legend: ■ Potentially addressable ■ Non-addressable

Year	Potentially addressable
2022	56
2023	60
2024	60
2025	61
2026	63
2027	67
2028	70
2029	72
2030	74

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And addressability makes Total TV work even harder

+120%
awareness*

x3
site visits**

Source: Sky, The Addressable Advantage

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

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BVOD
AVOD
SVOD
CTV TVOD
SaVOD
FAST

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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."

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.
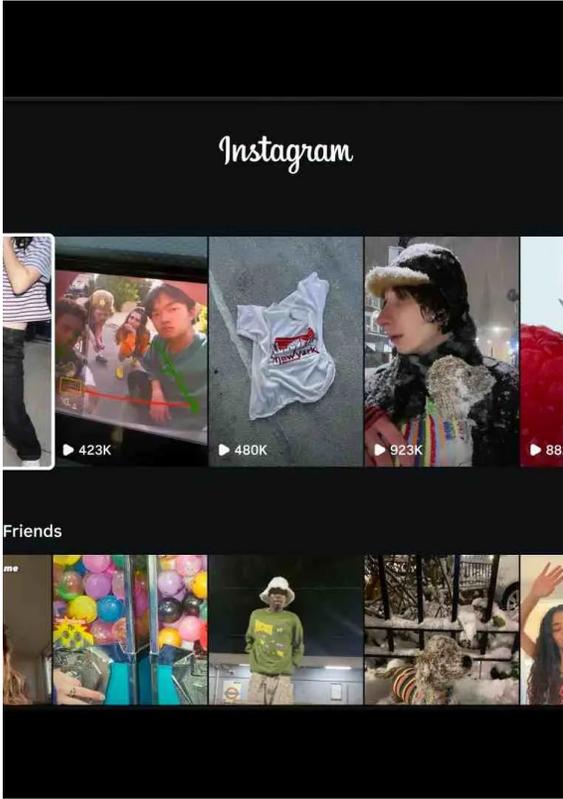
TV is just TV"

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"

DVLA - Dog

So we're in a video landgrab moment

Just saying something doesn't make it true
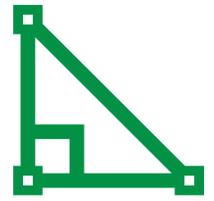
For advertisers, Total TV offers something special
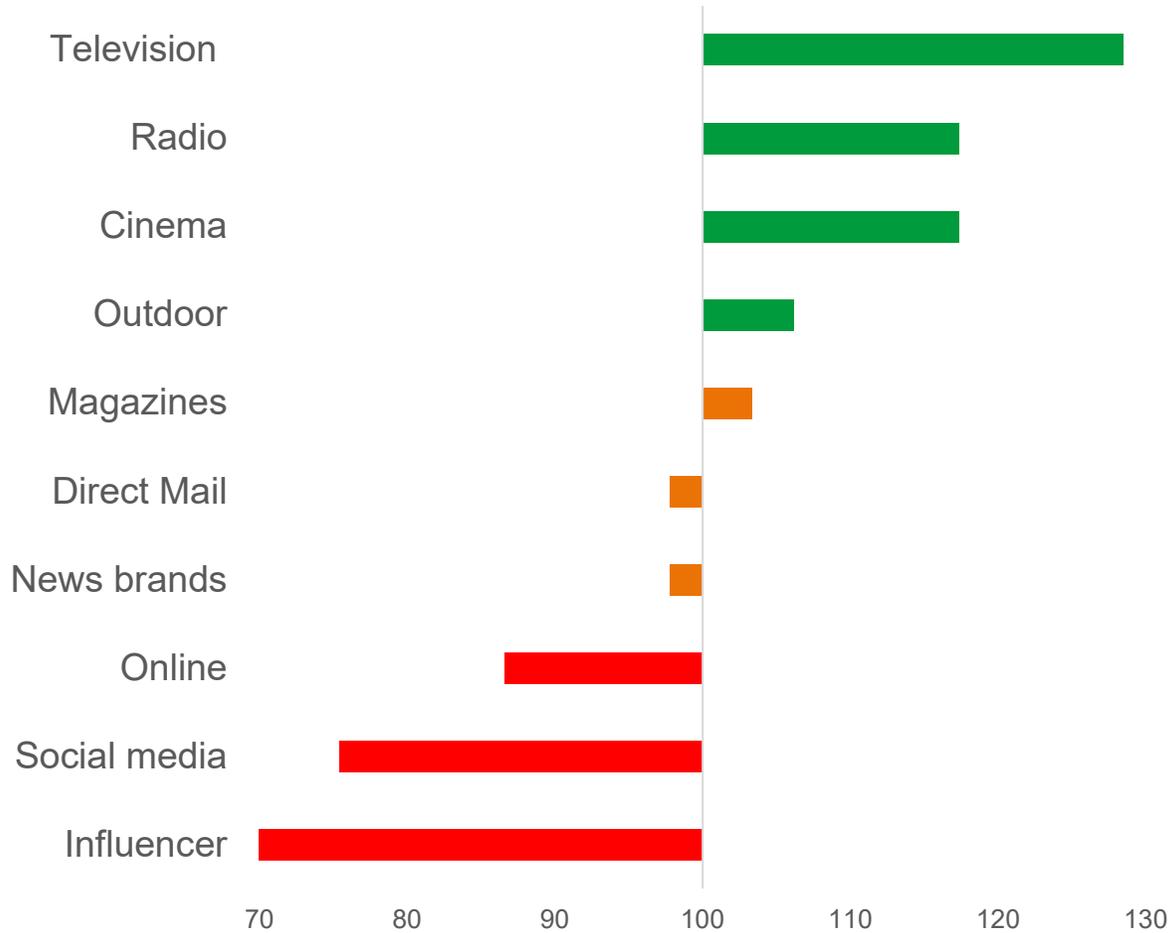
Regulated

Professionally produced

Verified by humans

Independently measured

thinkbox

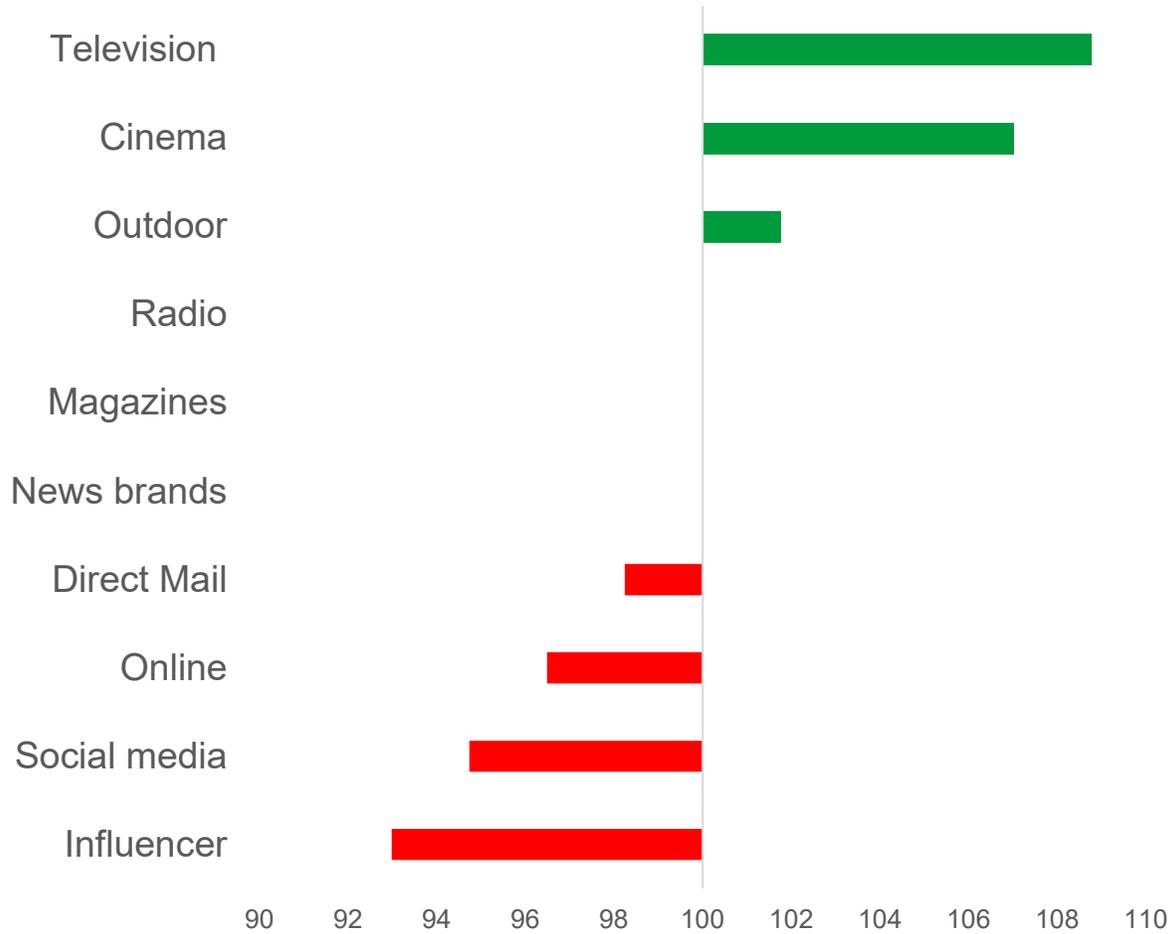Trust in advertising

Television
Radio
Cinema
Outdoor
Magazines
Direct Mail
News brands
Online
Social media
Influencer

70   80   90   100   110   120   130

Source: Credos Trust Tracker, indexed, all adults

For viewers, TV just means trusted

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Trust in advertising

Television	
Cinema	
Outdoor	
Radio	
Magazines	
News brands	
Direct Mail	
Online	
Social media	
Influencer	

90 92 94 96 98 100 102 104 106 108 110

Source: Credos Trust Tracker, indexed, 16-34

That's true for younger viewers as well

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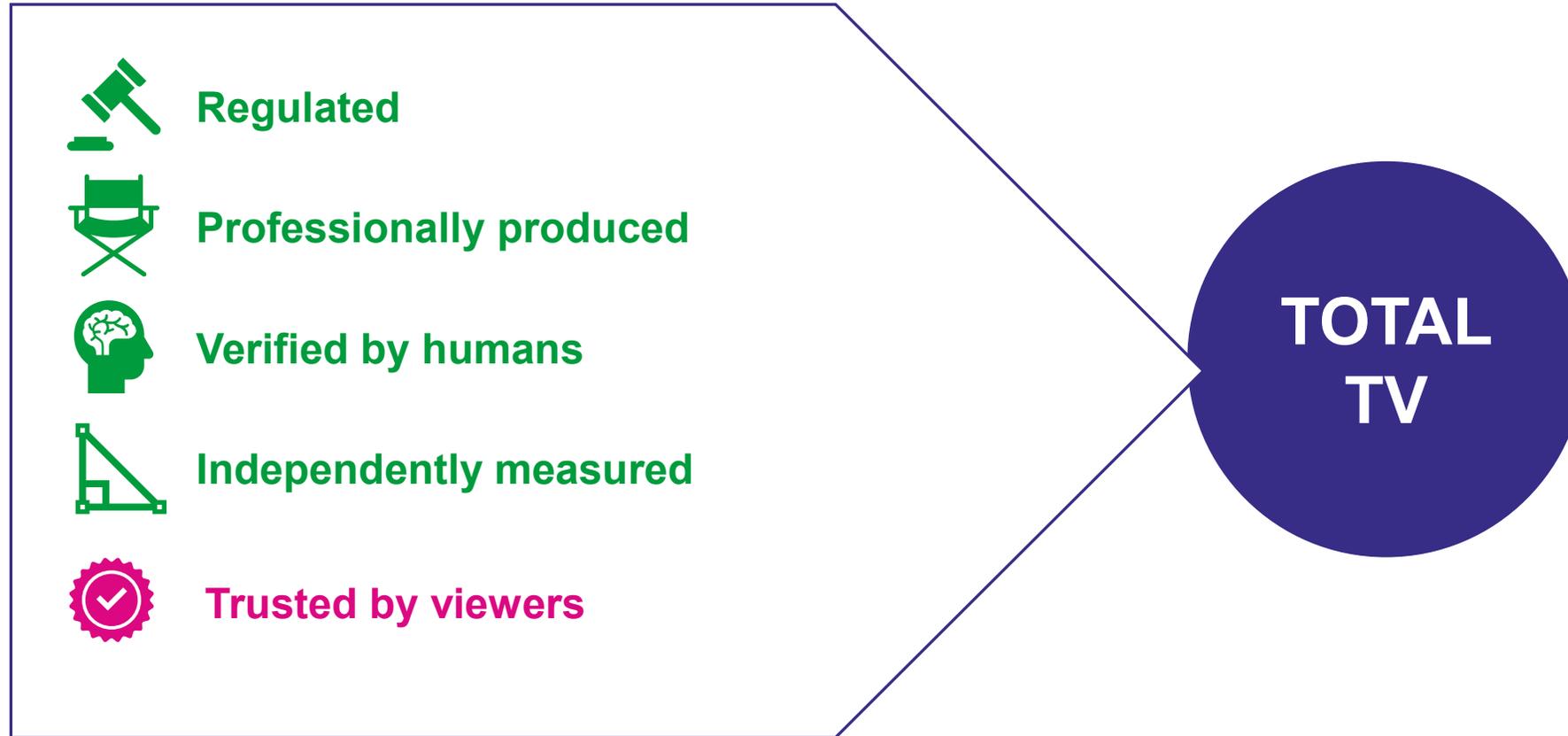# That's what makes TV... TV

Regulated

Professionally produced

Verified by humans
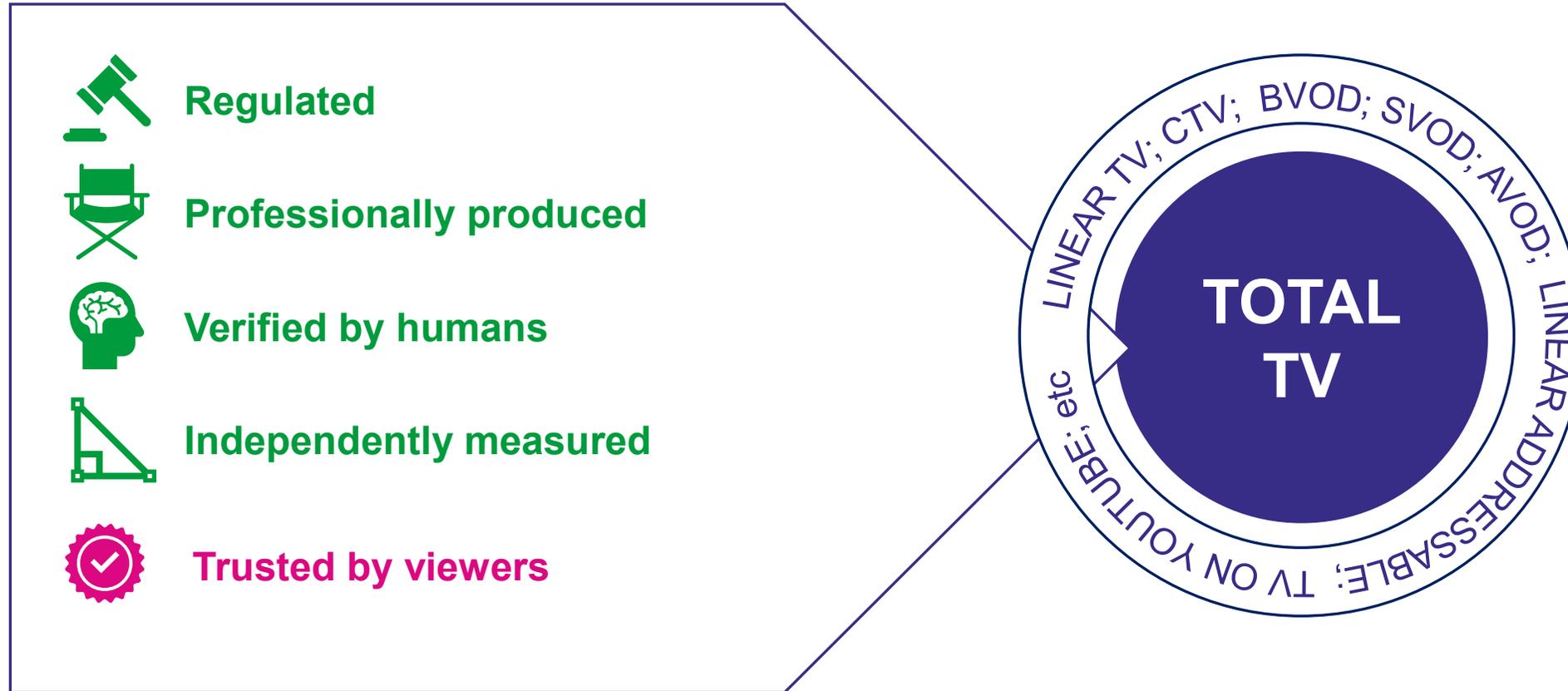
Independently measured

Trusted by viewers

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The video channels that deliver that are Total TV

Regulated

Professionally produced

Verified by humans

Independently measured

Trusted by viewers

TOTAL TV

thinkbox

An environment rather than unhelpful acronyms

Regulated

Professionally produced

Verified by humans

Independently measured

Trusted by viewers

LINEAR TV; CTV; BVOD; SVOD; AVOD; LINEAR ADDRESSABLE; TV ON YOUTUBE; etc

TOTAL TV

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A single environment, in two modes

🔨 **Regulated**

🎬 **Professionally produced**

🧠 **Verified by humans**

📐 **Independently measured**

✓ **Trusted by viewers**

MASS

TOTAL TV

ADDRESSABLE

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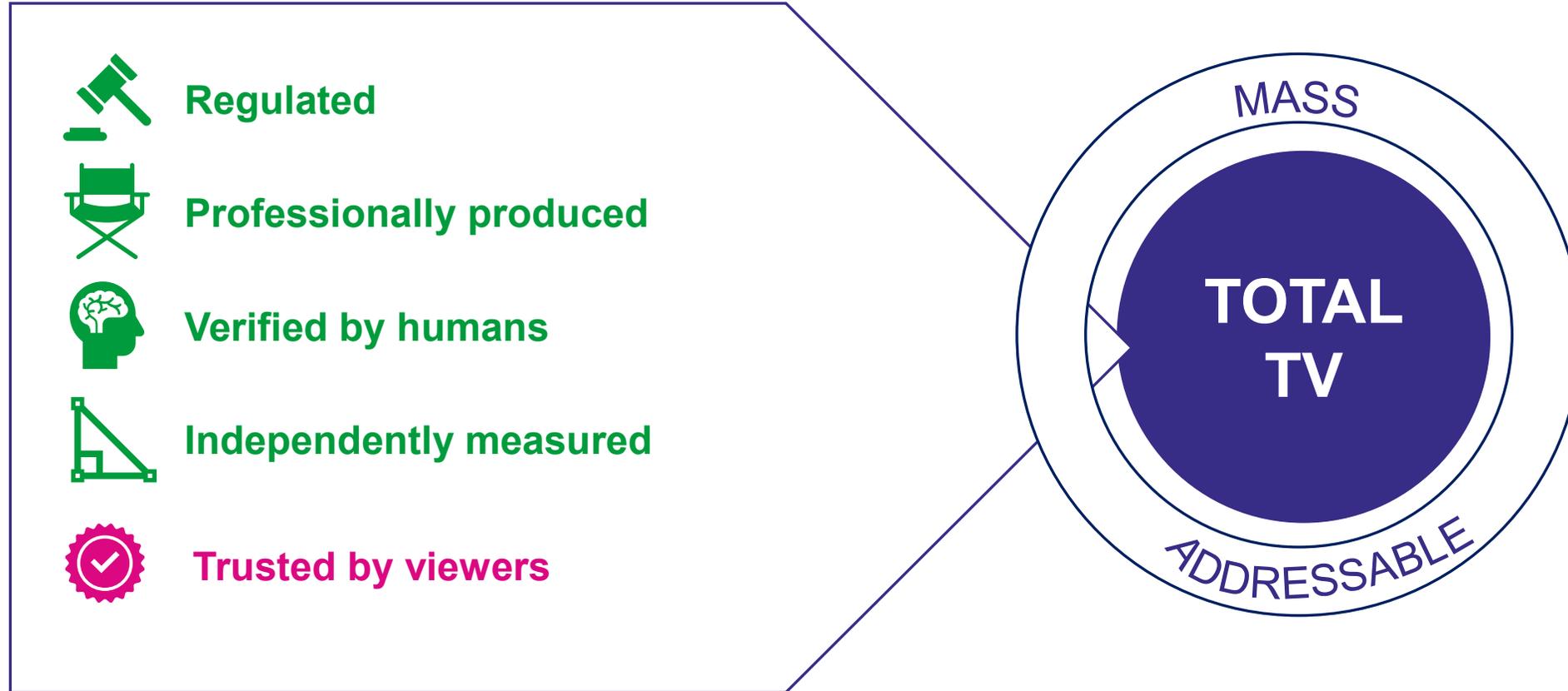
Those modes are available across the whole TV ecosystem

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.

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TV Now and Next

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