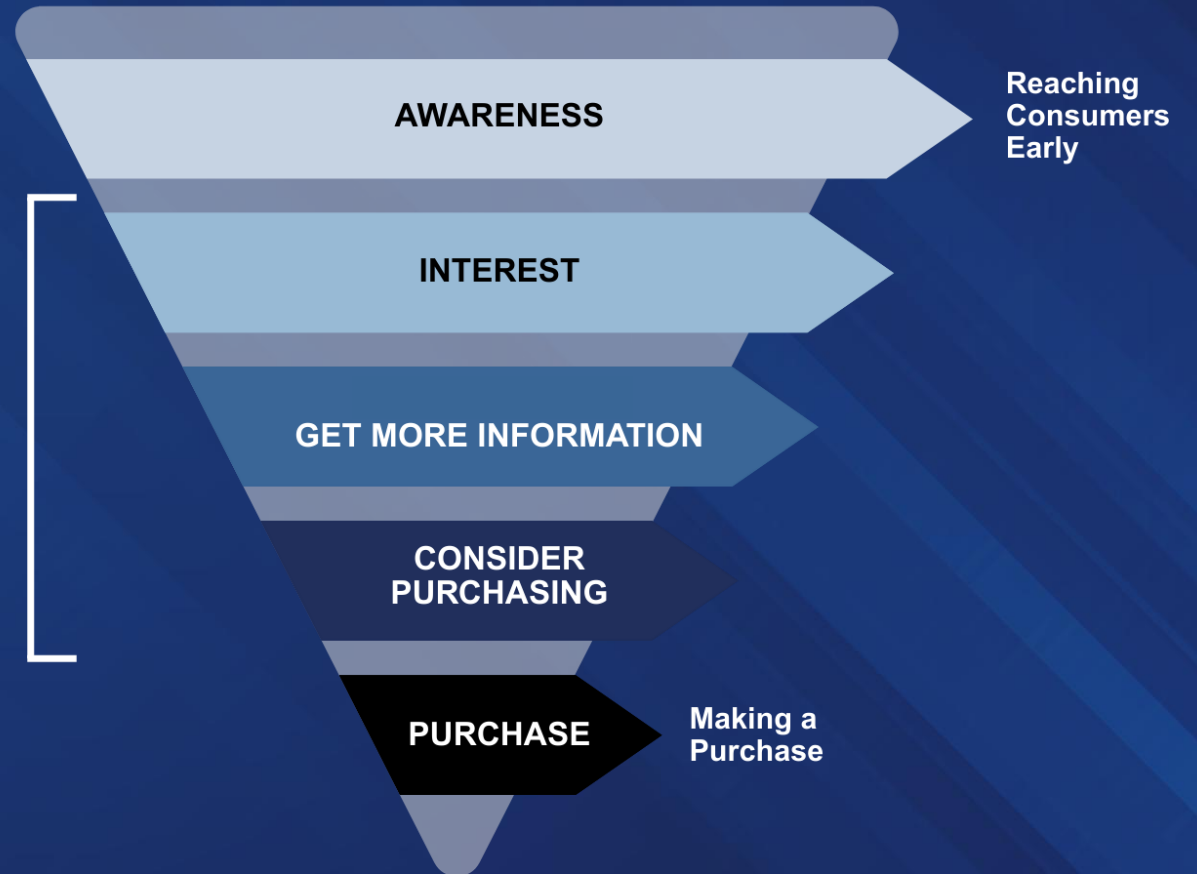


2026 Purchase Funnel Study

Synopsis



Preparing for
Purchase Decision



Key Findings: Purchase Funnel Study

- Television is the most important influencer at all stages of the purchase funnel. This is true for all key age groups, higher income households, high net-worth households, and ethnic groups.
- Among those who cited TV as the most important influence for awareness, 7 out of 10 respondents picked broadcast TV vs. cable.
- At 69%, television was the top platform for exposure to ads. This is more than 2X higher than streaming short-form VOD platforms like YouTube and social media which ranked a distant second and third for ad exposure.
- Exposure to a media platform is not a guarantee of consumer importance, except for TV.
- At 25%, the primary source of news for respondents are local broadcast TV assets (both linear & digital platforms).
- Local broadcast TV news is the most trusted among media platforms (70%). Social media (47%) and email newsletters (46%) are the least trusted.
- 89% of respondents said that linear TV ads influence their online search selections.
- Focusing on just streamers, the study found that those who stream 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 I 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 2, 2025 – December 17, 2025

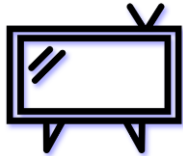
WHAT:

- Via 13-minute online qualitative 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.
- This general overview is compromised of 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)

These are the media platforms measured.

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



TV

(Broadcast, Cable and On-Demand)



Radio



Mail



OOH

(Billboard and Movie Theater)



Print

(Newspaper and Magazine, Yellow Pages)



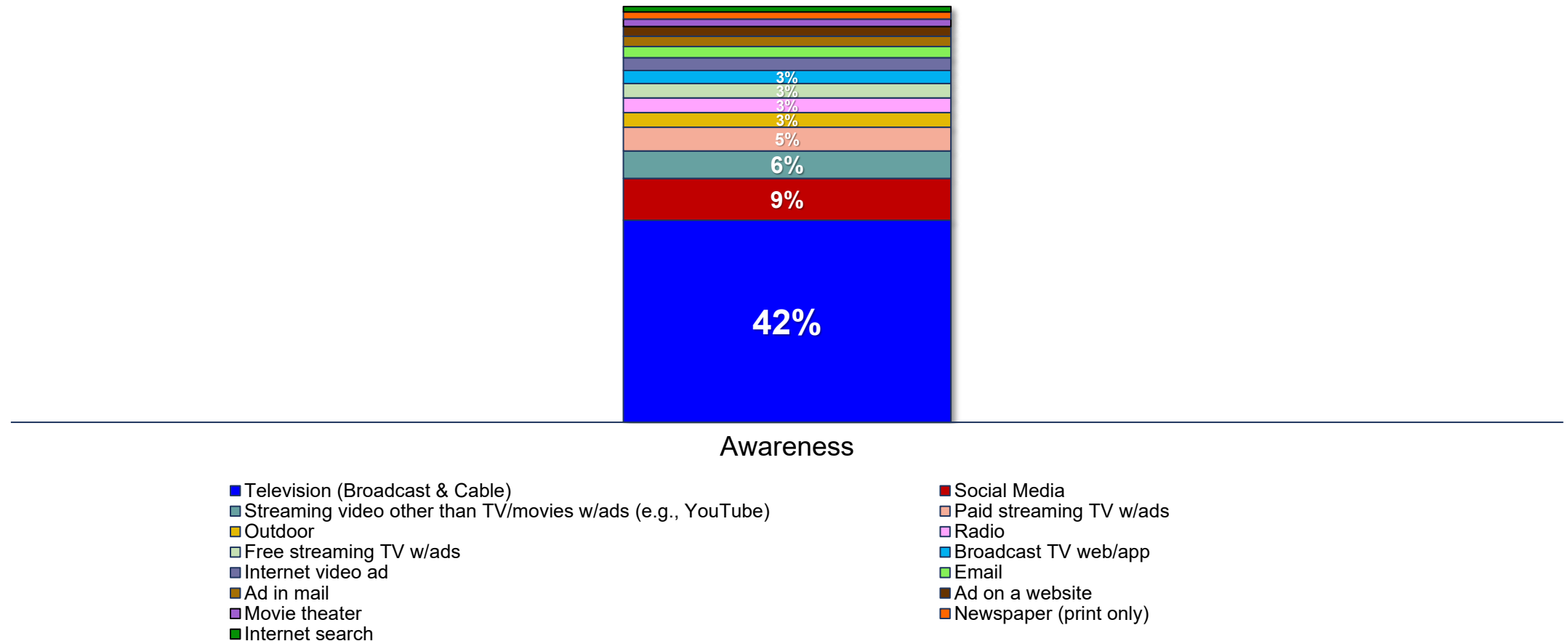
Digital



Digital media include:

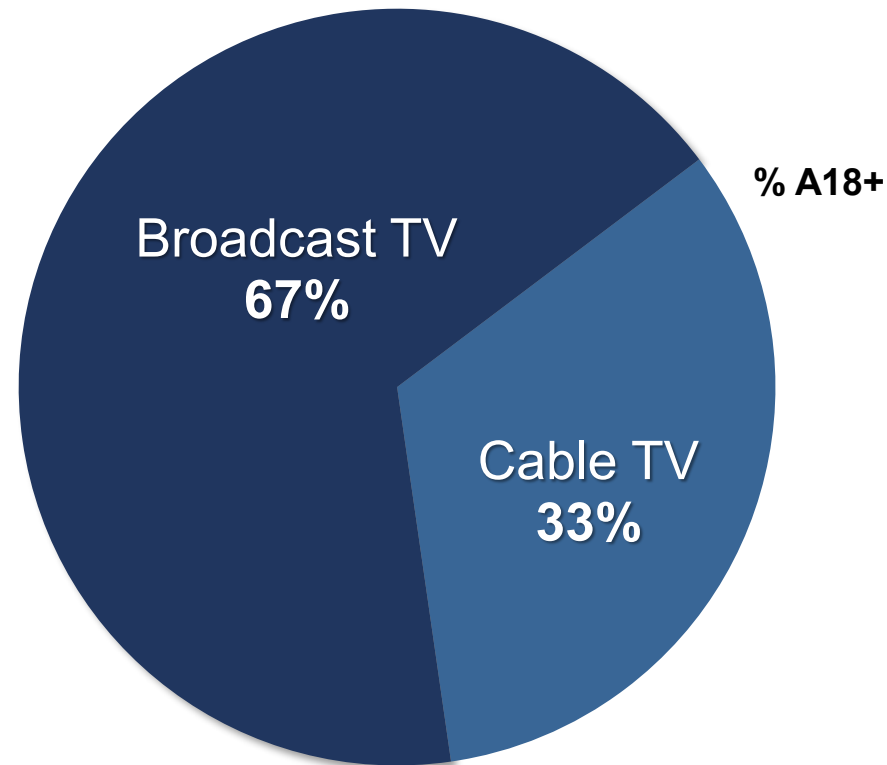
- Cable site/app
- Consumer review site/app
- Display/banner ad
- Email ad
- Internet radio
- Local radio station site/app
- Local TV station site/app
 - Local TV station text/video on a site/app
 - Local broadcast TV station's dedicated streaming video news app
 - Local TV news on a streaming platform such as Paramount+, Peacock, Roku, etc.)
- 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 (e.g., YouTube)
- Internet 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 Linear TV as the Most Important in Awareness Phase, a Third Picked Broadcast TV

All 6 Categories:

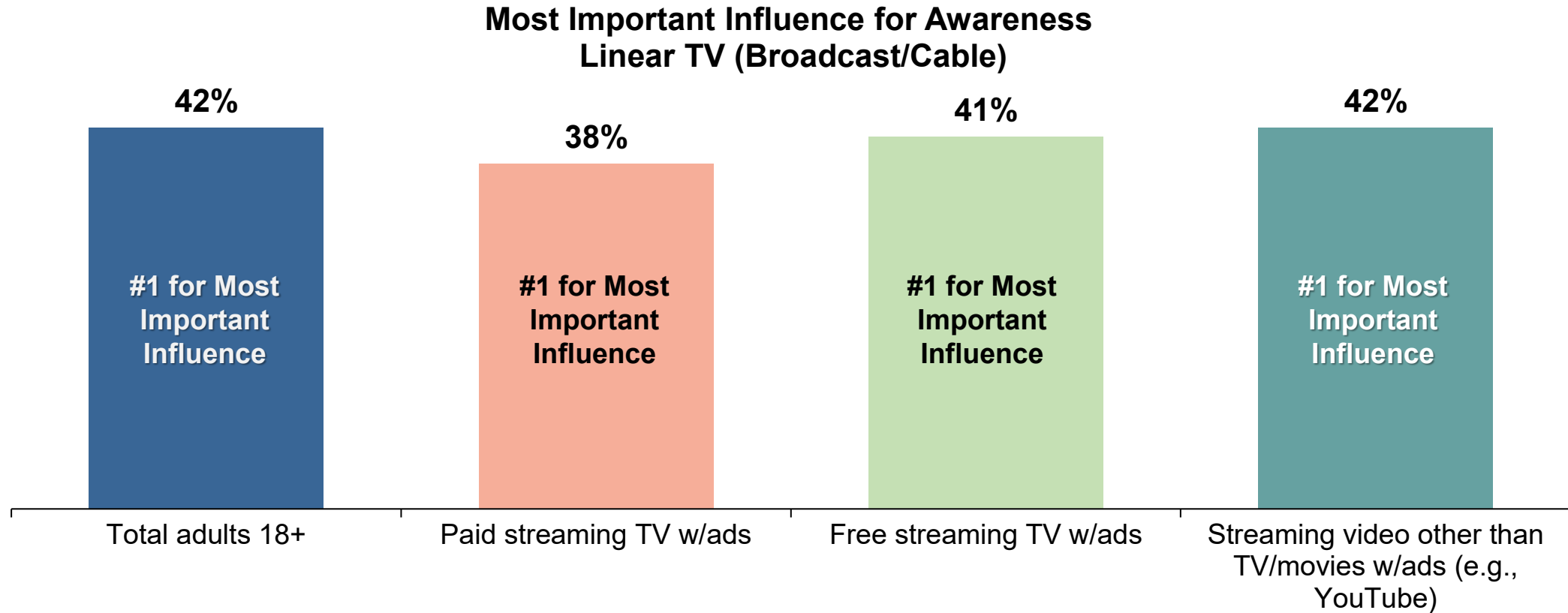


Source: GfK/NIQ TVB Purchase Funnel 2026 A18+

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 42% who chose television as most important, 67% chose broadcast TV

Streamers Deemed Linear TV the Most Important Influence for Awareness



TO BE READ AS: Looking at those exposed to free steaming with ads (FAST, AVOD) as their own universe, 41% deemed Linear TV as the most important influence for the awareness of a product/service.