

admtv Ekimetrics.

#ROITV6

IMMEDIATE EFFECTS

AND LASTING RESULTS

CALENDAR

CONTEXT & METHODOLOGY

1. CROSS-SECTOR VISION: TV/STREAMING, THE FOUNDATION OF EFFICIENCY

2. FOCUS ON 4 SECTORS

3. NEW OPTIMIZATION LEVERS:

3.1. THE MARGINAL R.O.I

3.2. THE R.O.E (RETURN ON EQUITY) & BASELINE

4. OTHER ZOOMS (SPONSORSHIP / SYNERGY / INTERNATIONAL)

5. CONCLUSION

Ekimetrics is the global leader in data science, providing artificial intelligence solutions with over 400 data scientists and more than 2,000 projects since 2006. Named global leader in the Marketing Mix Modeling market by Forrester

THIS PARTNERSHIP WITH EKIMETRICS

PROVIDES

Valuable insights

GUARANTEES

robust data with a broad
scope and 3 years of data
depth

OFFERS

all advertisers, strong and
tangible insights

REFLECTS

an internationally recognised
approach and methods
(Forrester, Gartner) and an
*audit conducted by the CESP

* Audit dated 2022

PREAMBLE & SCOPE

Figures consistent with the results of the 2024 study

The differences and developments stem from several factors :

New time frame – 2022/2024 vs. 2021/2023 for #ROITV5

A unique period: inflationary context (inflation rate of +5.2% in 2022 and +4.9% in 2023), political and economic uncertainty internationally and in France.

Emergence of streaming services

Advertisers entering and leaving the benchmark

Cross-sector: Finance, Healthcare, Media, Retail, Automotive, FMCG, Technology, Mobility, Hospitality & Leisure, Cosmetics & Beauty, Luxury Goods

#ROITV6: TV/STREAMING, IMMEDIATE EFFECTS & LASTING RESULTS

3 YEARS OF DATA DEPTH

SELECTED RETAIL

24 models / 6 brands / ~ 120 campaigns

AUTOMOBILE

35 models / 7 brands / ~420 campaigns

CPG

22 models / 14 brands / ~150 campaigns

PREMIUM COSMETICS

22 models / 15 brands / ~140 campaigns

FINANCE

19 models / 7 brands / ~105 campaigns

E-COMMERCE WEBSITES

12 models / 8 brands / ~ 100 scampaign

4
2
HISTORICAL
SECTORS
NEW
SECTORS

+219 ECONOMETRIC
MODELS on the global
scope

134 ECONOMETRIC MODELS
on the focus sectors

NOVEMBER 2025



6 KEY DEFINITIONS

ROI should not be analyzed in isolation and should always be considered in relation to contribution.

**TV / STREAMING =
TV + BVOD + SVOD**

R.O.I (RETURN ON INVESTMENT)

Revenue generated per €1 invested in media. $ROI = \text{Revenue generated} \div \text{Media investments}$. TOTAL ROI = Short-term ROI (4 months) + Long-term ROI (+24 months)

CONTRIBUTION

Contribution in % = $\text{Revenue generated by the media} \div \text{Revenue generated by all media}$.

SYNERGY

Measuring how the simultaneous activation of multiple media makes a campaign more effective in terms of sale

R.O.I MARGINAL

R.O.I of the last euro invested in media
The marginal R.O.I for a given investment amount is the R.O.I of the next euro invested.

R.O.E (RETURN ON EQUITY)

This is the impact of a brand's equity indicators: Top 3 of mind, awareness, consideration. In this presentation, R.O.E is directly translated into impact on sales.

1

CROSS-SECTOR VISION

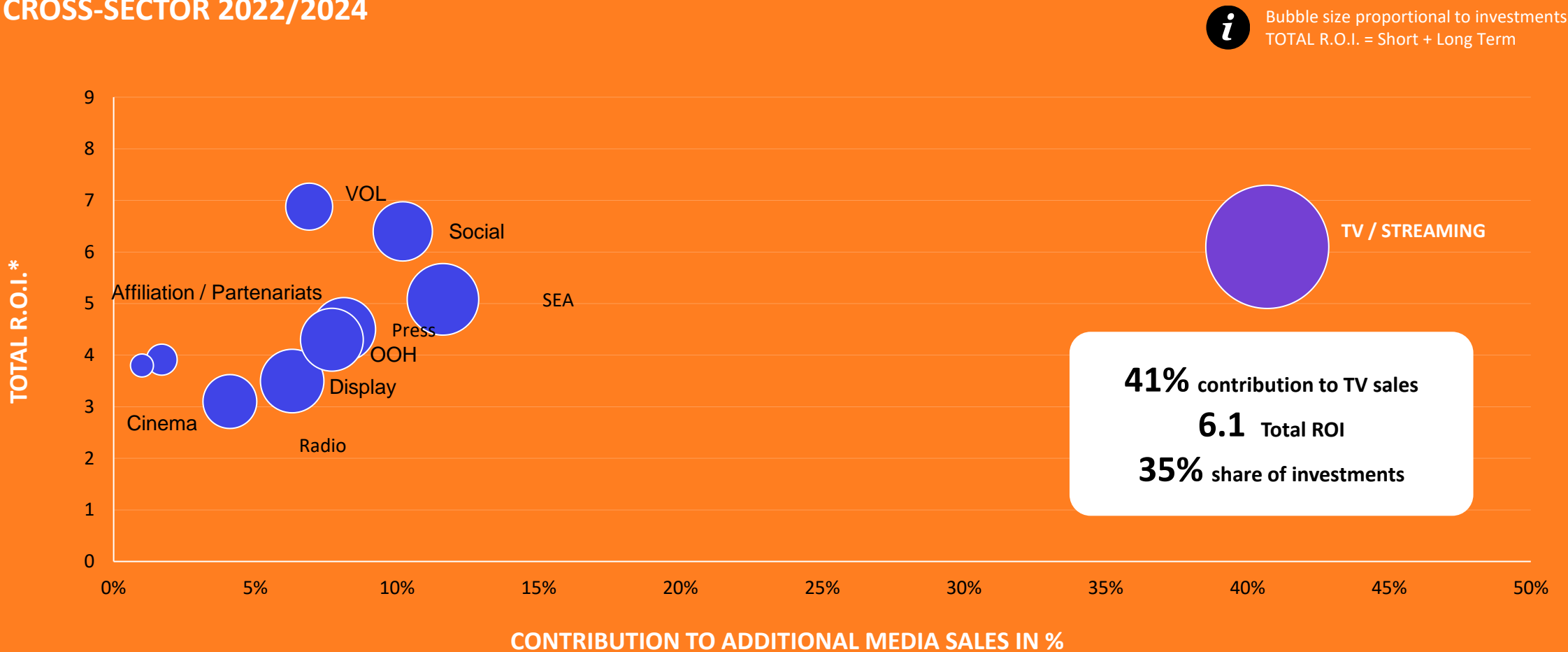
TV/streaming remains
the most effective media platform

Contributions & R.O.I
TV & Long-term multiplier

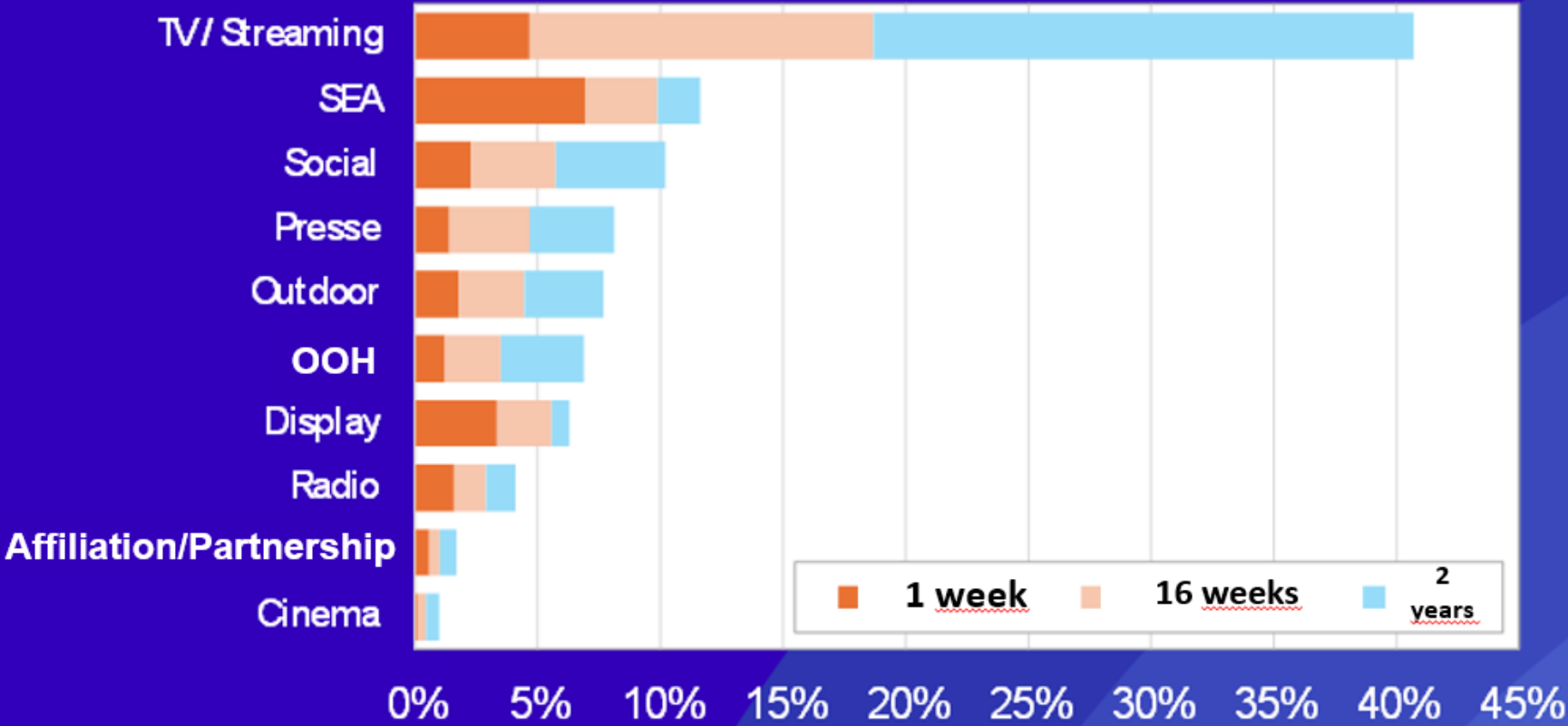


CROSS-SECTOR: TV/STREAMING MAINTAINS THE BEST ROI/CONTRIBUTION RATIO

CROSS-SECTOR 2022/2024



CROSS-SECTOR: IMPACT OF MEDIA LEVERS ON SALES OVER TIME



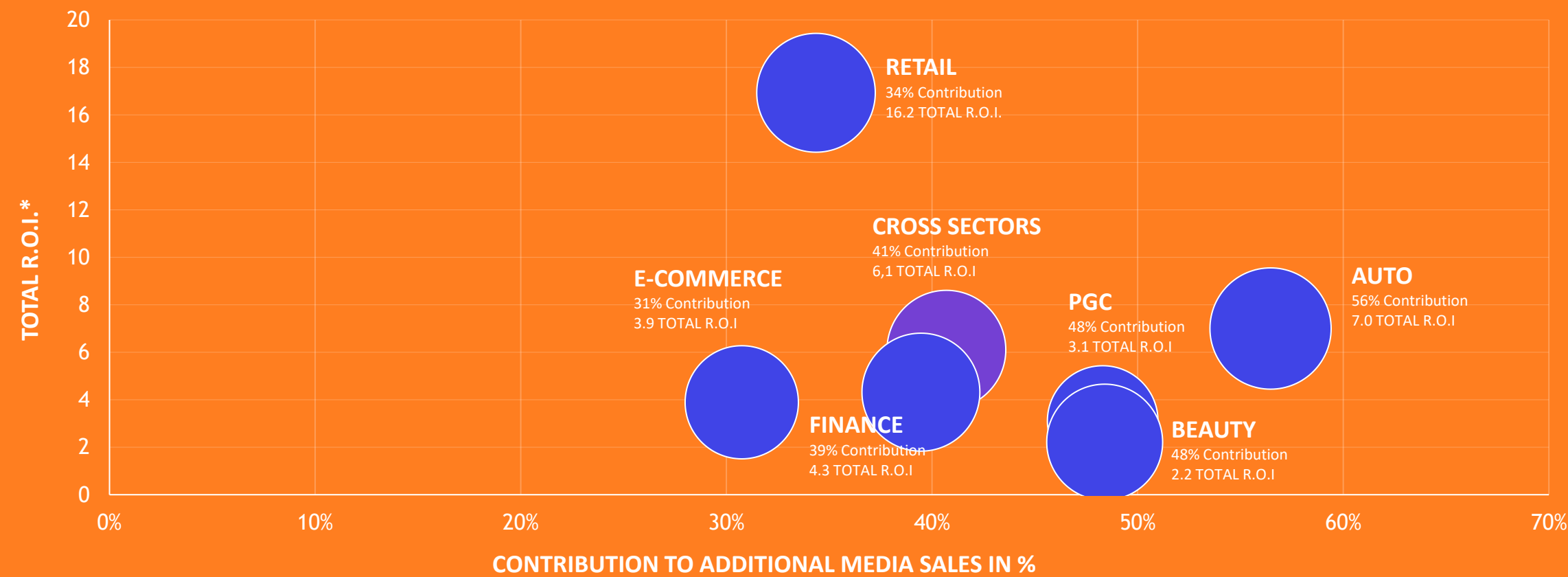
The short-term impact of TV/streaming generates 19% of the total media sales contribution.

And the two-year effects account for 22% of the total media contribution.

CROSS-SECTOR: REGARDLESS OF THE SECTOR, TV/STREAMING REMAINS THE LEADING CONTRIBUTOR

TV / STREAMING – GLOBAL SCOPE – 2022 / 2024

i Bubble size proportional to investments
TOTAL R.O.I. = Short + Long Term



Cross-sector: Finance, Healthcare, Media, Retail, Automotive, FMCG, Technology, Mobility, Hospitality & Leisure, Cosmetics & Beauty, Luxury Goods

#ROITV6: TV/STREAMING, IMMEDIATE EFFECTS & LASTING RESULTS

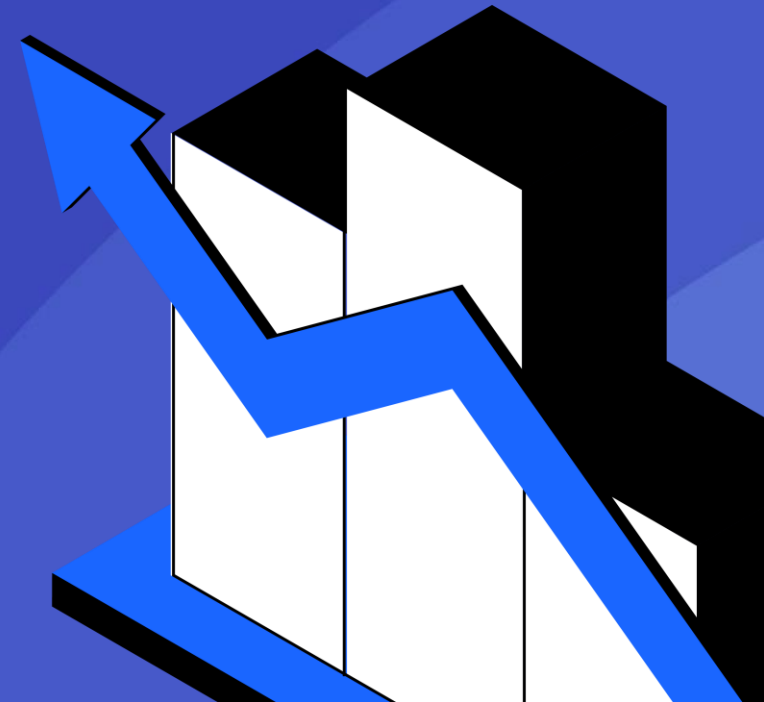
NOVEMBER 2025



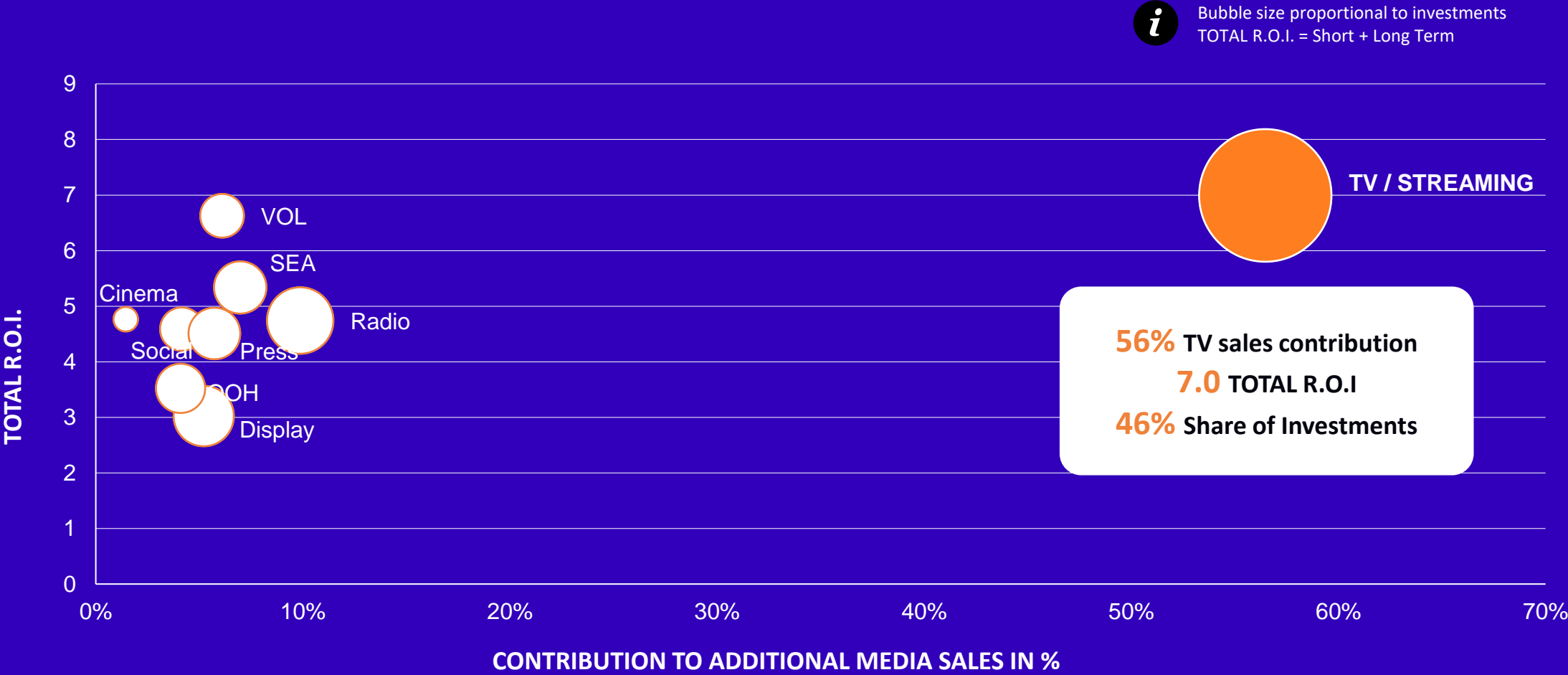
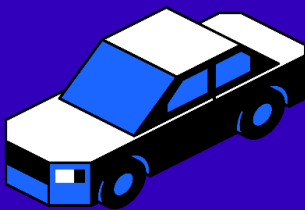
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FOCUS ON 4 SECTORS

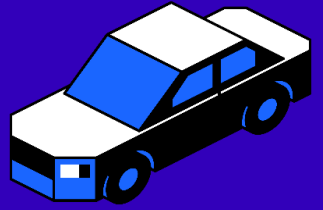
Automobile
Specialized Retail
PGC
Finance



AUTOMOBILE: TV/STREAMING DELIVERS THE BEST ROI AND THE STRONGEST CONTRIBUTION



AUTOMOBILE : PROVEN EFFECTIVENESS FOR AUTOMOTIVE MANUFACTURERS



CONTRIBUTION TO SALES

56%

Sales generated by the
media are thanks to
TV/STREAMING.

TOTAL R.O.I

7€

For every €1
invested

Average media
R.O.I for the
sector: €5.6

SYNERGY

RADIO : **+6%**

VOL : **+6%**

SEARCH : **+5%**

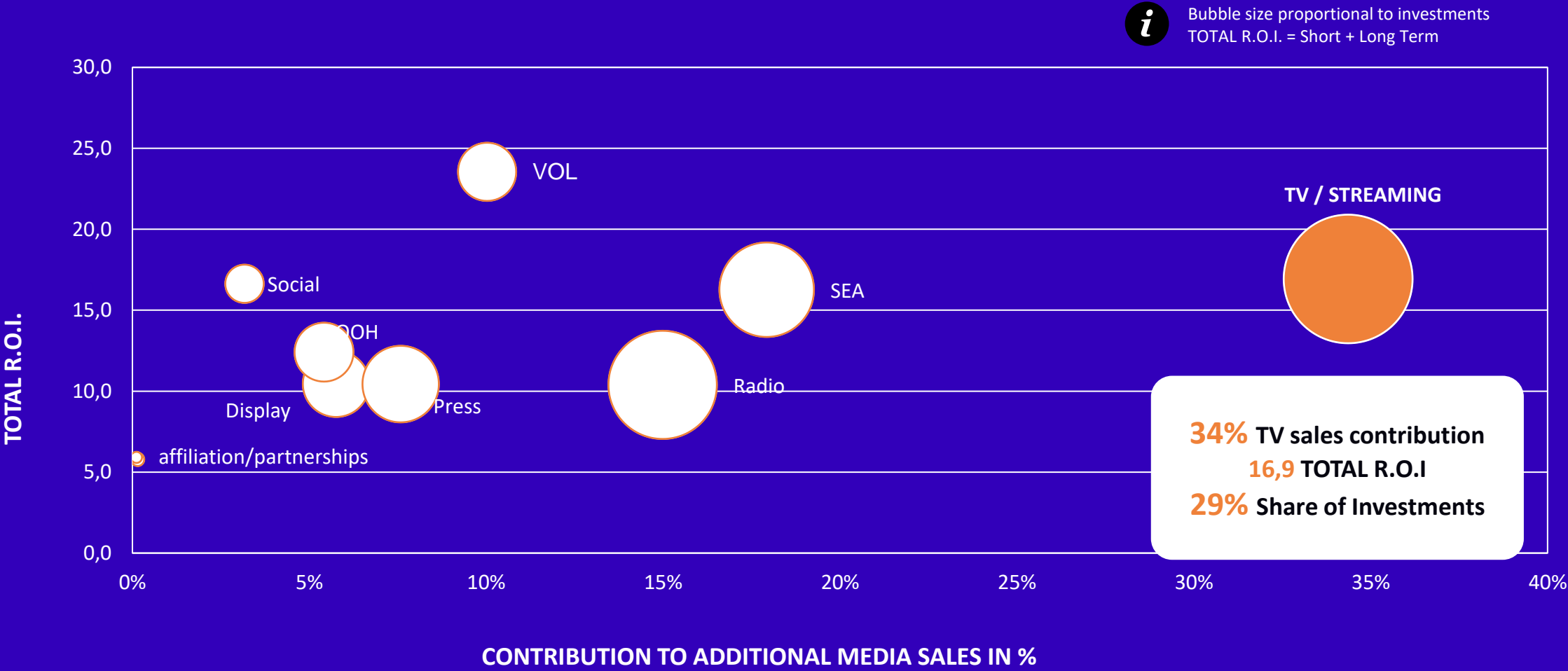
INSIGHTS

- Leading traffic generator during open Days, contributing 61% of traffic

Image and cross-vehicle campaigns are highly effective in terms of ROE and total ROI. Campaigns for electric cars are particularly effective in terms of ROE (+10% on average).

Average ROI for the sector on the rise, benefiting from a more dynamic product plan and more effective brand campaigns on average

SELECTED RETAIL : TV/STREAMING ACCOUNTS FOR ONE-THIRD OF THE CONTRIBUTION



SELECTED RETAIL : THE BEST R.O.I. FROM TV/STREAMING FOR THIS SECTOR



CONTRIBUTION TO SALES

34%

Sales generated by the media are generated through TV/STREAMING

TOTAL R.O.I

16,9 €

For every €1 invested

Average media R.O.I for the sector: €14.9

SYNERGY

VOL : **+6%**

SEA : **+6%**

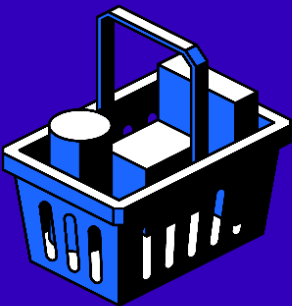
OOH : **+5%**

INSIGHTS

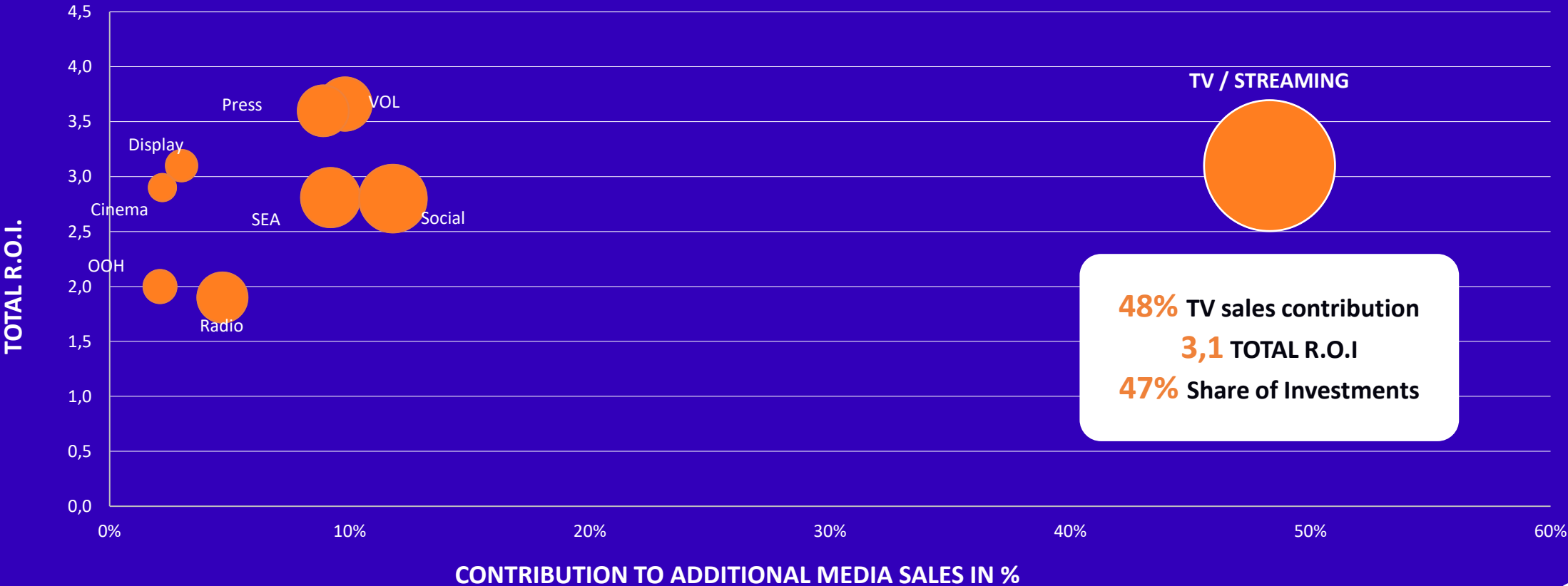
- TV/streaming is highly effective across the entire spectrum. It builds brand image and remains the leading generator of in-store traffic (after the visibility of the distribution network itself).
- TV/streaming increases the purchase frequency of loyal customers by 15% and also increases penetration with the acquisition of new customers (25%).

TV sponsorship is also highly effective, with performance boosts of up to three times on certain campaigns that are relevant to the program.

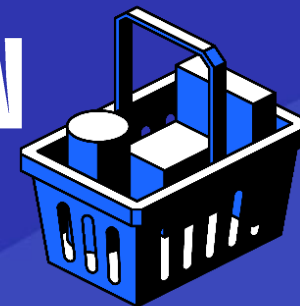
CPG: TV/STREAMING ACCOUNTS FOR NEARLY HALF OF THE CONTRIBUTION



i Bubble size proportional to investments
TOTAL R.O.I. = Short + Long Term



CPG: TV/STREAMING ACCOUNTS FOR HALF OF THE CONTRIBUTION TO SALES IN THIS SECTOR.



CONTRIBUTION TO SALES

48%

Sales generated by the media are generated through TV/STREAMING.

R.O.I TOTAL

3,1€

For every €1 invested

Average media R.O.I for the sector: 3.0 €

SYNERGY

RADIO : **+6%**

VOL : **+6%**

SOCIAL : **+4%**

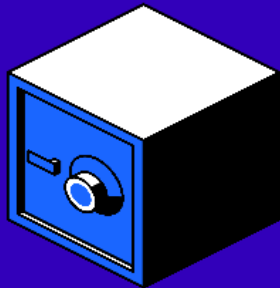
INSIGHTS

- TV/STREAMING remains a powerful performance driver, helping brands to stand out in terms of distribution, market penetration, and therefore sales.

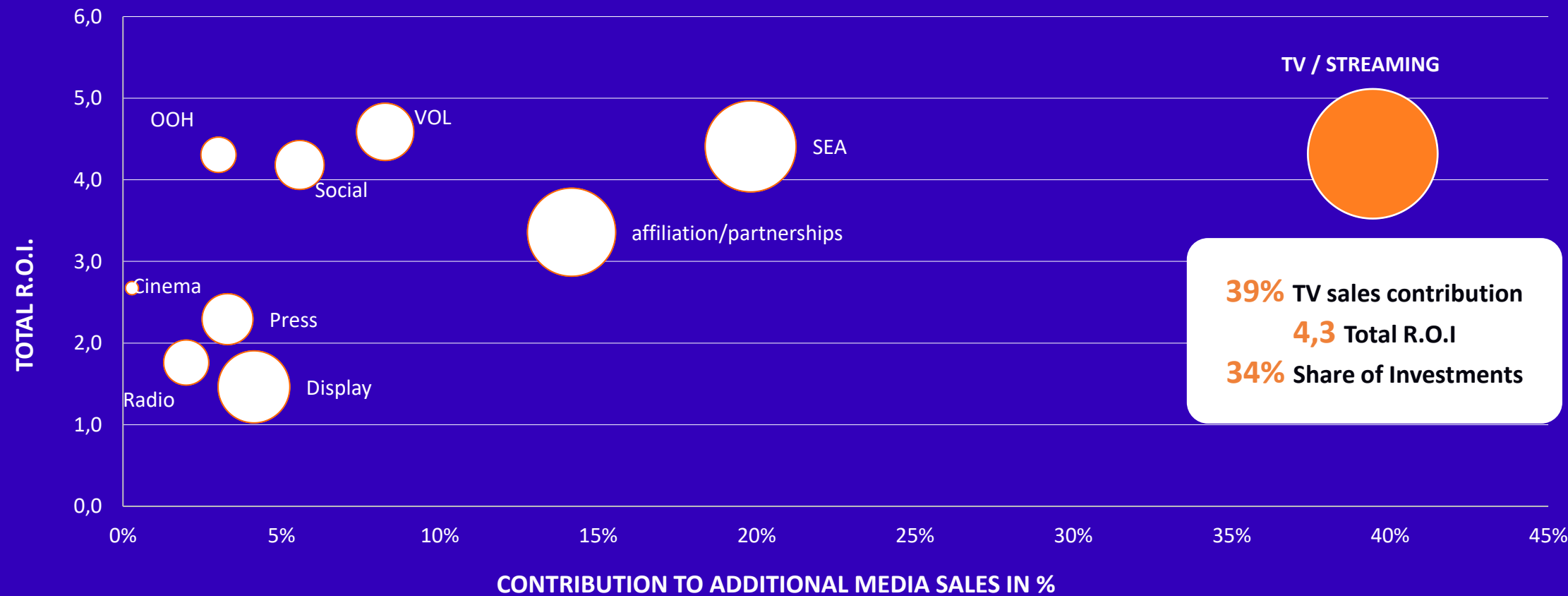
Prioritize TV/STREAMING for “Branding” campaigns and “product launches” to boost sales and brand indicators.

Focus on TV/STREAMING during peak market periods.
TV/STREAMING is very effective in maximizing halo effects within product ranges.

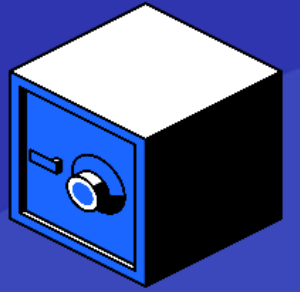
FINANCE: TV/STREAMING ACCOUNTS FOR NEARLY HALF OF THE CONTRIBUTION



i Bubble size proportional to investments
TOTAL R.O.I. = Short + Long Term



FINANCE: THE EFFECTIVENESS OF TV/STREAMING IS GROWING IN THIS SECTOR



CONTRIBUTION TO SALES

39%

Sales generated by the media are generated through TV/STREAMING.

TOTAL R.O.I

4,3 €

For every €1 invested

Average media ROI for the sector: €3.7

SYNERGY

SEARCH :
+8%

VOL : **+7%**

DISPLAY :
+6%

INSIGHTS

- This is the sector in which the effectiveness of TV/STREAMING has increased the most since the last study : 39% contribution to sales vs. 33% last time and 4.3 ROI vs. 3.7.

This sector also sees the greatest synergistic effects, with search increasing the effectiveness of TV/STREAMING by 8%.

TV/STREAMING brings in a qualified audience for the financial sector that converts better and has a lower churn rate than other media.

The long-term effect of TV is greater than in other sectors (X2.4 vs. X2.1 on average).

SYNERGY : THE BEST SYNERGIES TO EXPLOIT

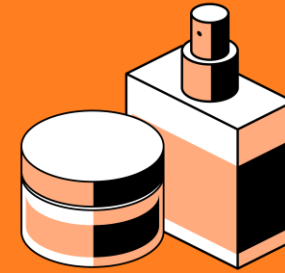


E-COMMERCE

DISPLAY : +7%

SEARCH : +9%

VOL : +6%



PREMIUM COSMETICS

OOH : +5%

PRESSE : +7%

*INFLUENCE : +4%

*Influence = events, influencers (cost of collaboration/content), PR

#ROITV6: TV/STREAMING, IMMEDIATE EFFECTS & LASTING RESULTS

NOVEMBER 2025

3

NEW LEVERS FOR OPTIMIZING EFFICIENCY

R.O.I marginal

R.O.E

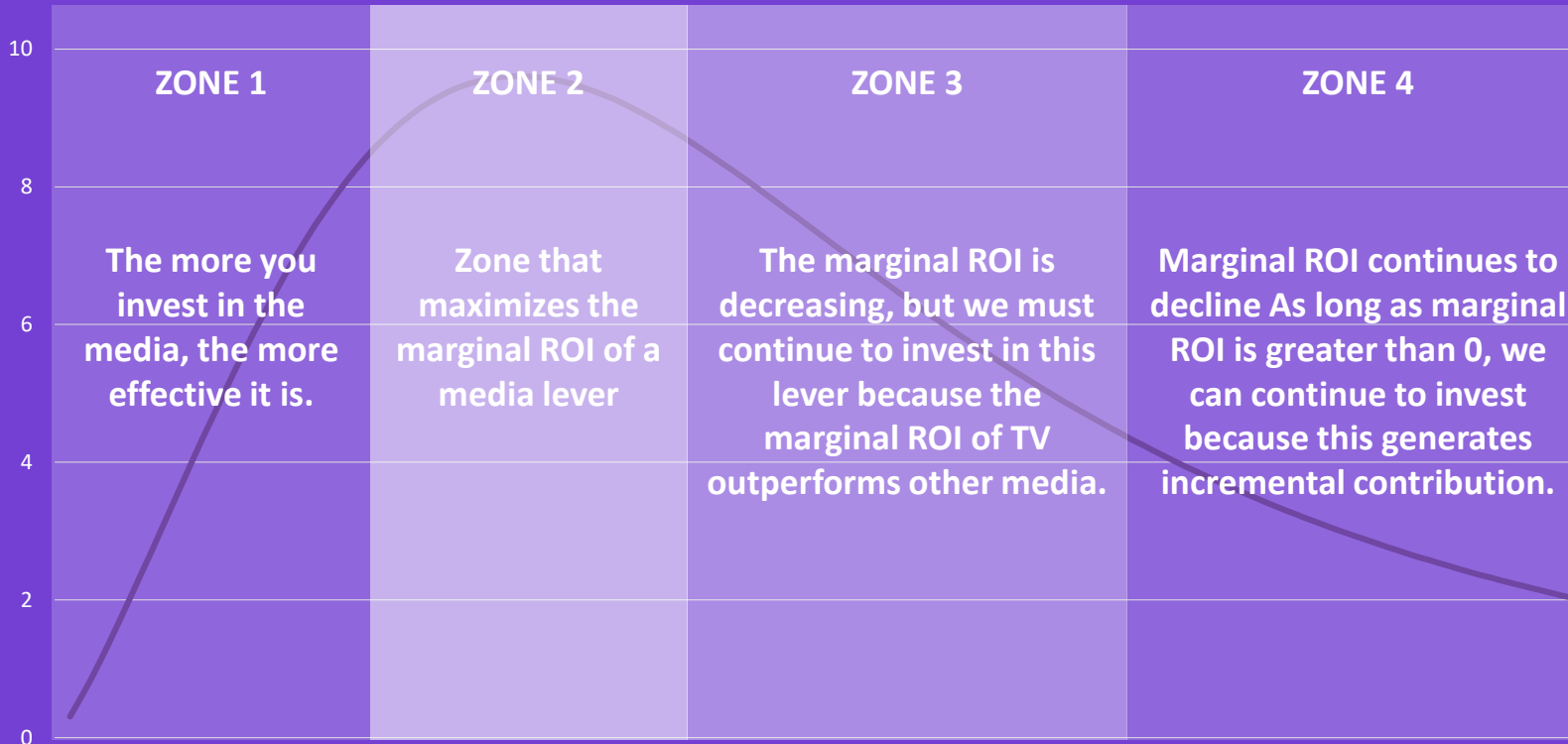


MARGINAL ROI VS AVERAGE ROI: PRINCIPLES



EX: AUTOMOBILE – MARGINAL KING DEPENDING ON INVESTMENTS

12



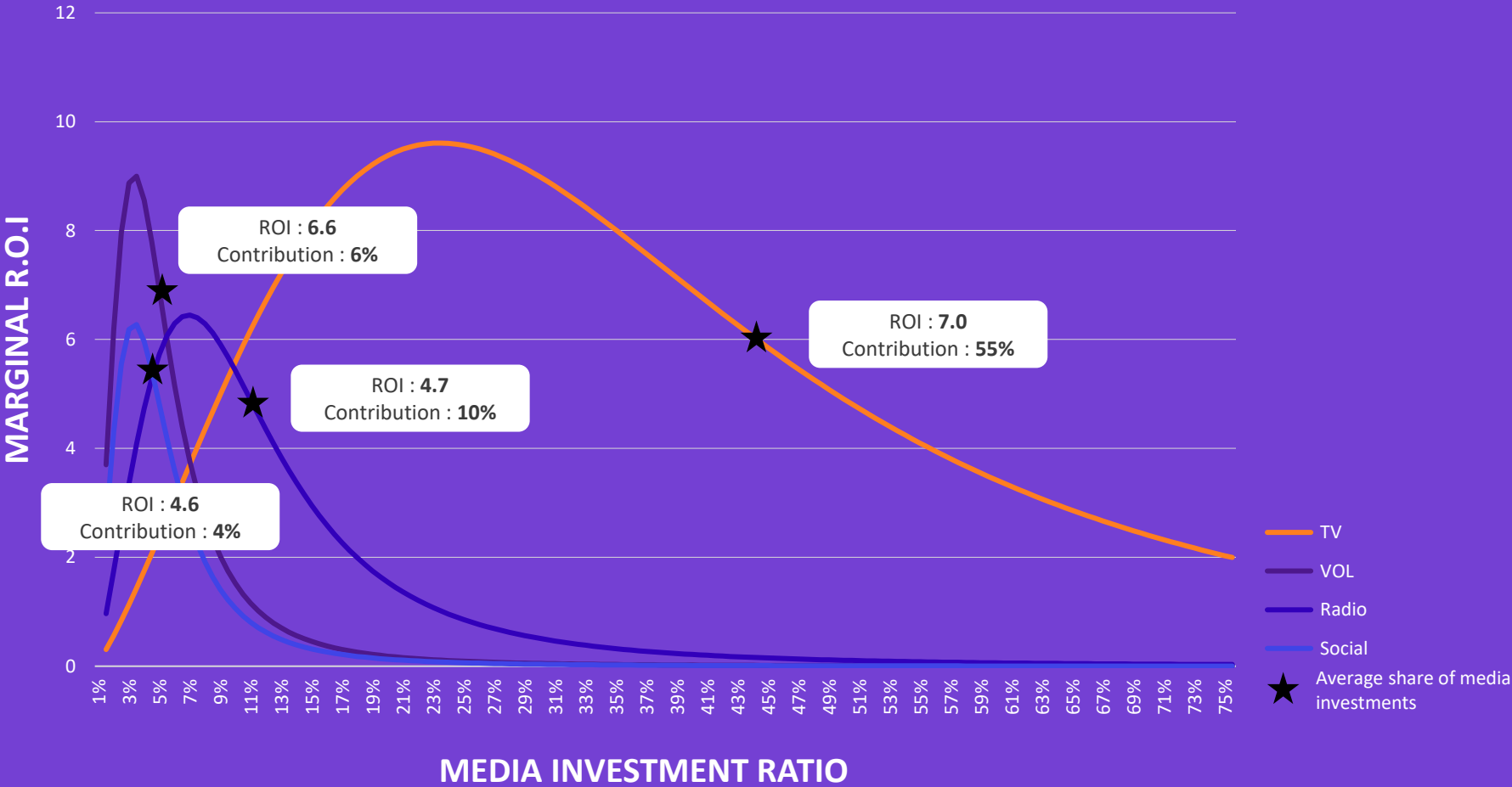
Even if the marginal ROI decreases, we can continue to invest:

- Higher marginal ROI than other levers
- Highly competitive sector
- Volume growth strategy
- Product launches

MARGINAL TV R.O.I in the AUTOMOTIVE SECTOR



MARGINAL R.O.I BASED ON THE WEIGHT OF INVESTMENTS IN EACH MEDIA



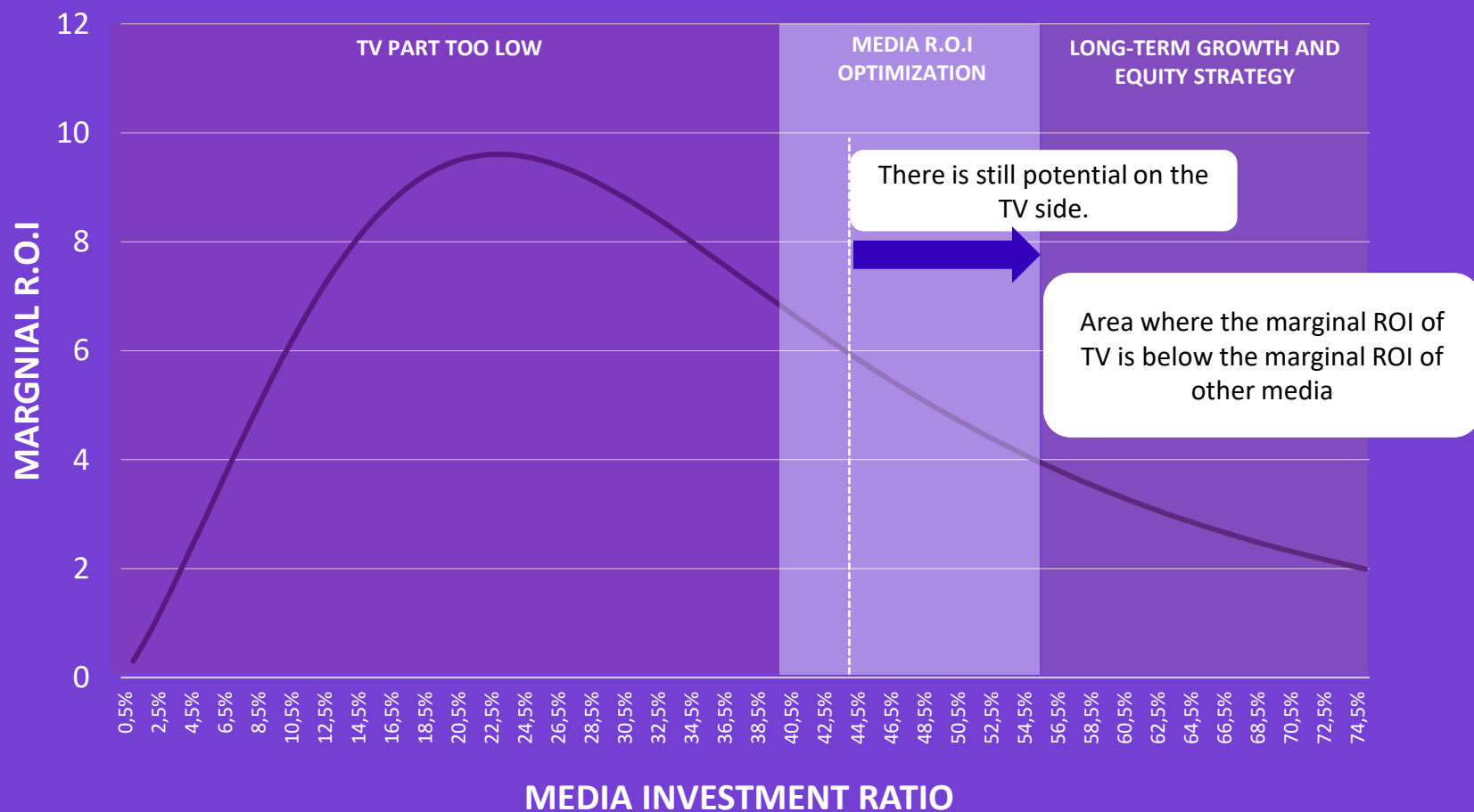
The marginal ROI of TV peaks at around 25% of media investments. It is the only medium whose marginal ROI remains stable and stays above 1, even with a 50% weight of investments.

Average R.O.I
Average contribution

AUTOMOBILE: AN OPTIMAL INVESTMENT ZONE BETWEEN 40% AND 55% FOR TV



MARGINAL R.O.I TV AUTOMOTIVE



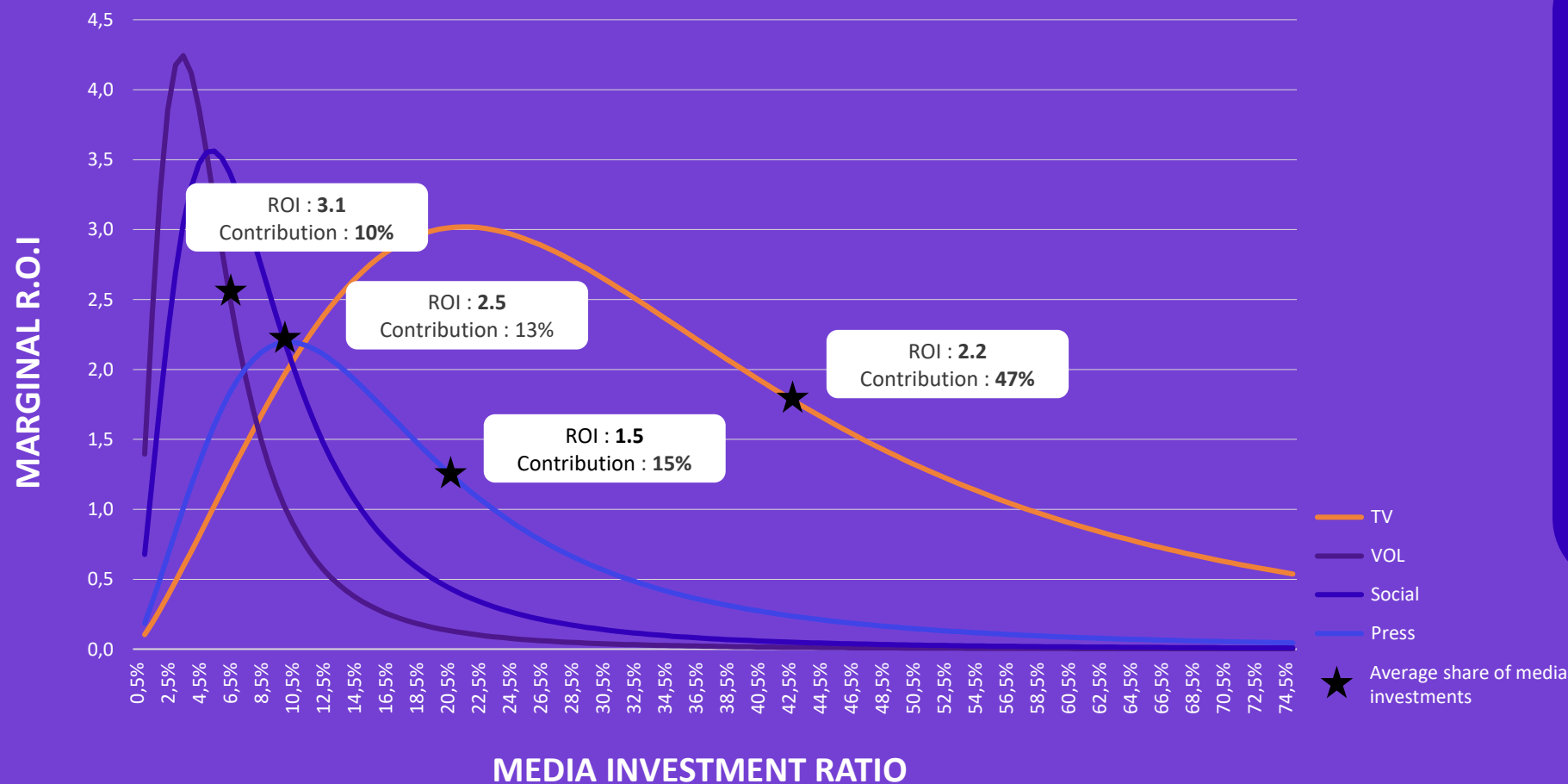
- There is still potential in TV media to increase ROI and the impact of auto campaigns.

The marginal ROI of TV is still very high (4) at 55% of investments.

PREMIUM COSMETICS: TV ACHIEVES A HIGH MARGINAL ROI BUT REMAINS WELL ABOVE 1 FOR A VERY LONG TIME.



MARGINAL ROI BASED ON THE WEIGHT OF INVESTMENTS IN EACH MEDIUM



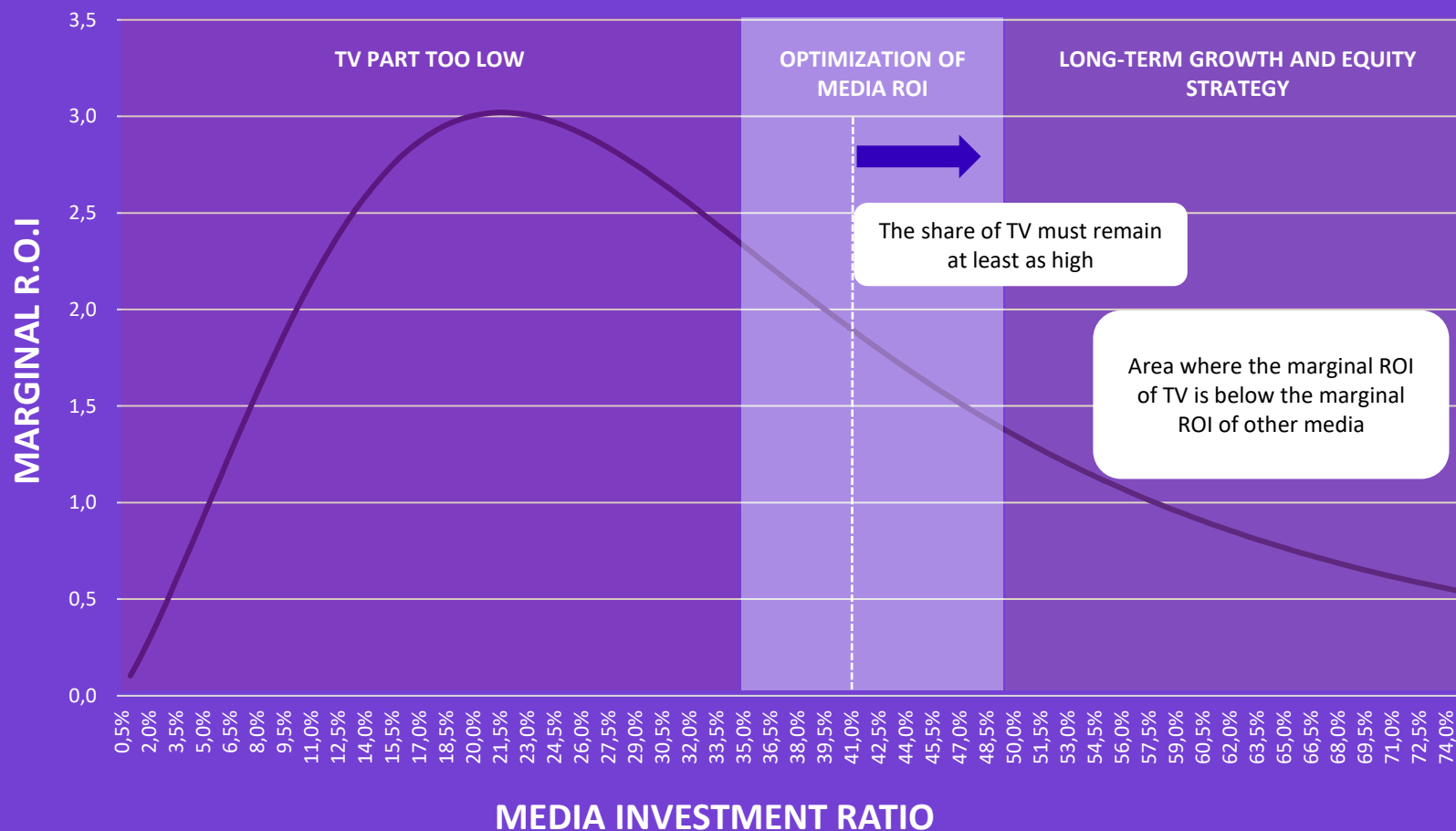
- The marginal ROI of TV peaks at around 20% of media IP.
- It remains above 1, up to +57% share of TV investment.
- It is the only medium that allows you to maintain a marginal ROI >1 on very high IPs during peak market times.

Average R.O.I.
Average contribution

PREMIUM COSMETICS: AN OPTIMAL INVESTMENT ZONE BETWEEN 35% AND 50% FOR TV



MARGINAL R.O.I FOR PREMIUM COSMETICS TV ADVERTISING



- TV is a key medium during important periods in the beauty sector.

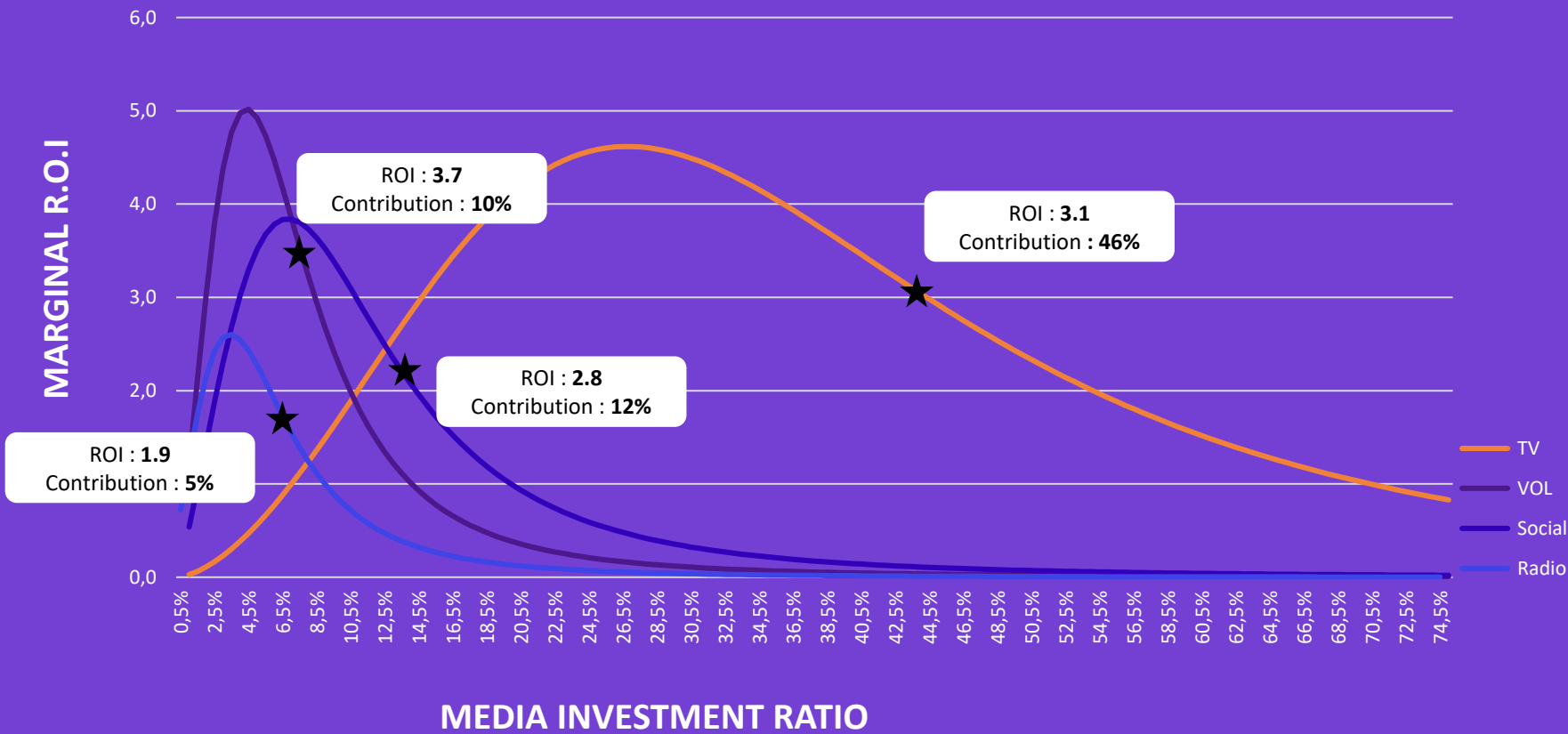
The potential of TV compared to other media is underutilized at less than 30% of IPs, particularly for perfume.

Up to 57% of media IPs, TV retains a marginal ROI > 1

CPG: TV ENJOYS A VERY HIGH MAXIMUM MARGINAL R.O.I AND THE ABILITY TO MAINTAIN STRONG EFFECTIVENESS AND MANY REPEATS.



MARGINAL ROI BASED ON THE WEIGHT OF INVESTMENTS IN EACH MEDIA



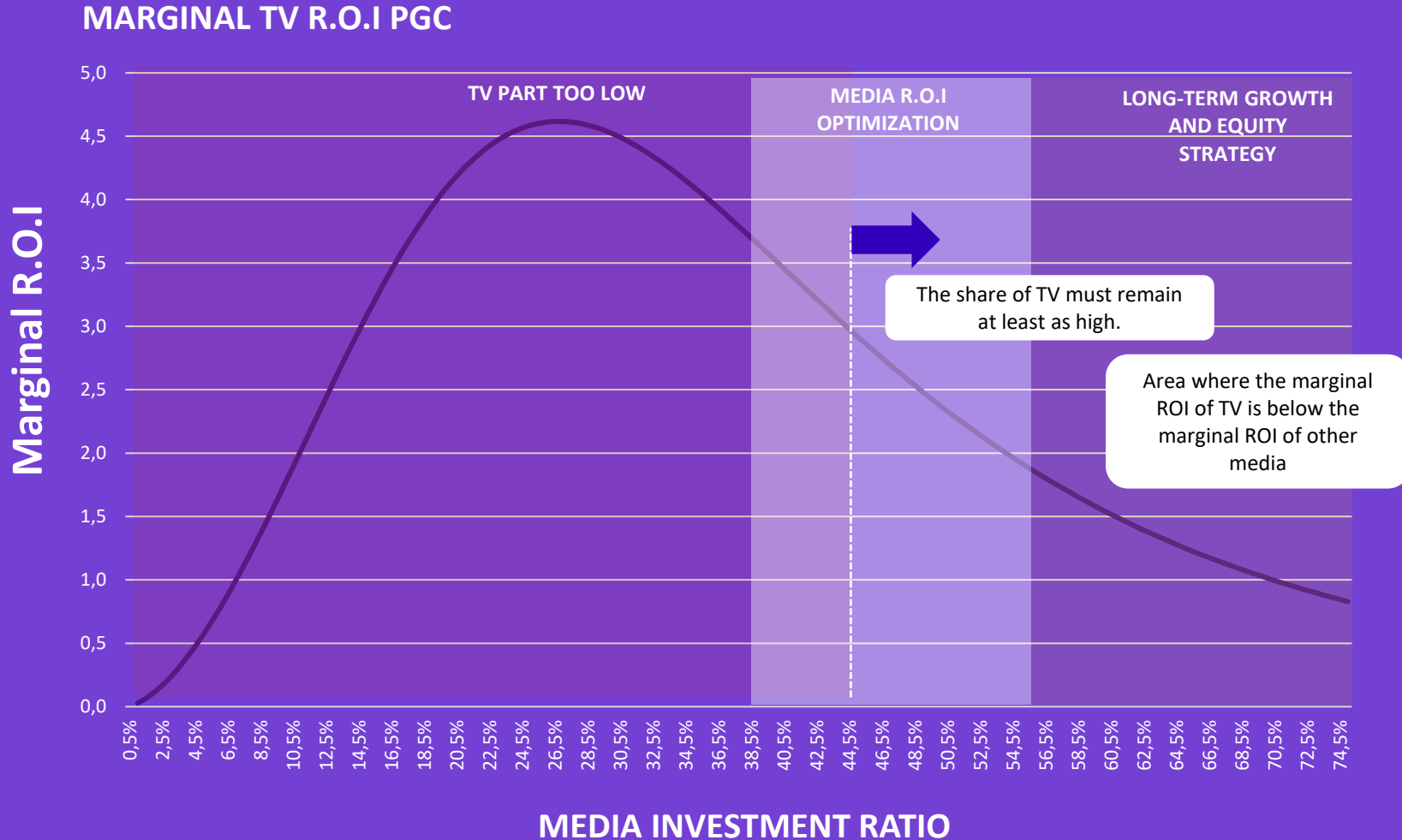
○ The marginal ROI of TV peaks at around 26% of IPs. média en TV

The marginal ROI is greater than 1 for up to approximately 70% of investments.

★ Average share of media investments

Average ROI
Average contribution

CPG: AN OPTIMAL INVESTMENT ZONE BETWEEN 39% AND 53% FOR TV



- There are still pockets of opportunity to increase TV IPs and maintain campaign performance. The IP share should not fall below 35%, particularly for leading brands.

3

NEW LEVERS FOR OPTIMIZING EFFICIENCY

R.O.I marginal
R.O.E



R.O.E: IMPACT ON THE BRAND

IMPACT OF MEDIA ON
BRAND IMAGE

Equity, Consideration,
Share of Search

R.O.E

Volumes & Sales

R.O.I CT

R.O.I LT

Short term (0-4 months)

Long term (4-24 months
+ Contribution to baseline)

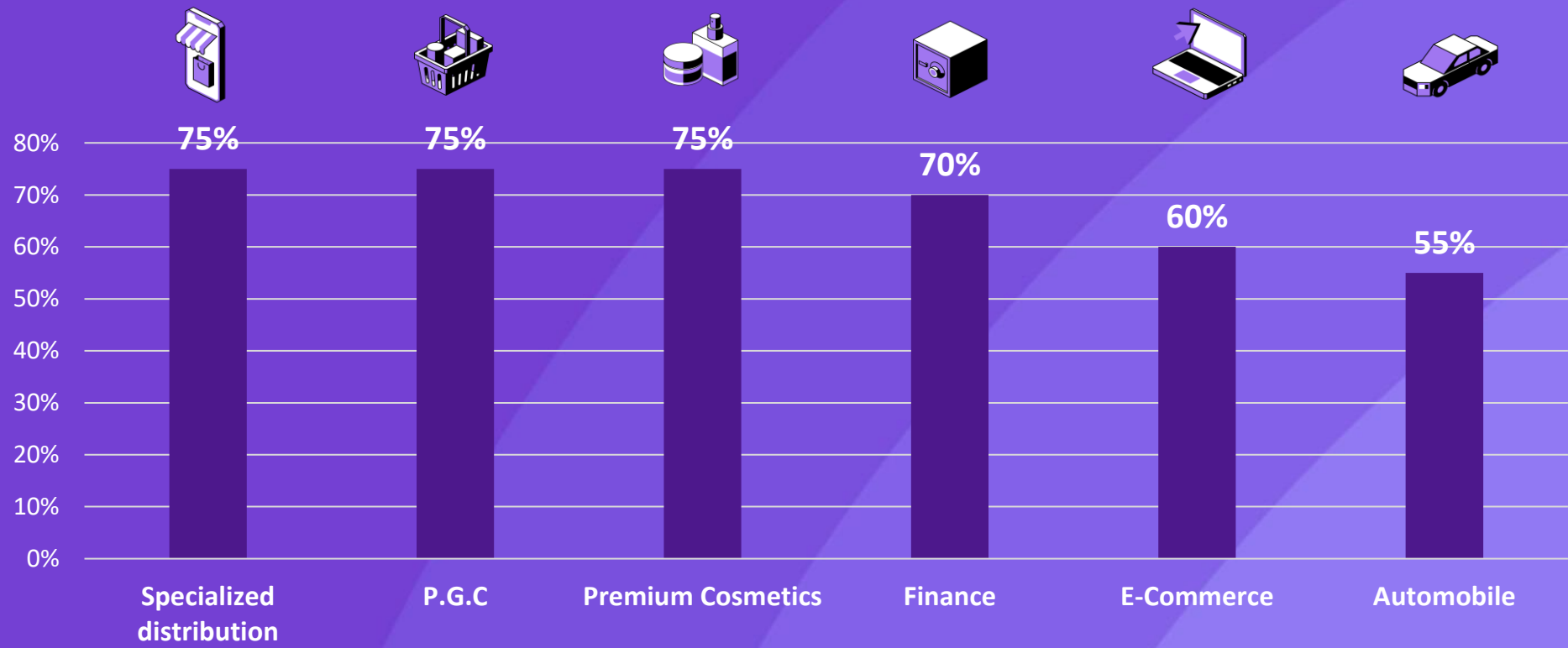
Using a “cascade” model, we
integrate the contribution of equity
into the baseline!

IMPACT OF MEDIA ON
SALES

R.O.E: TV IS THE DRIVER OF EQUITY, AND THEREFORE OF THE BASELINE

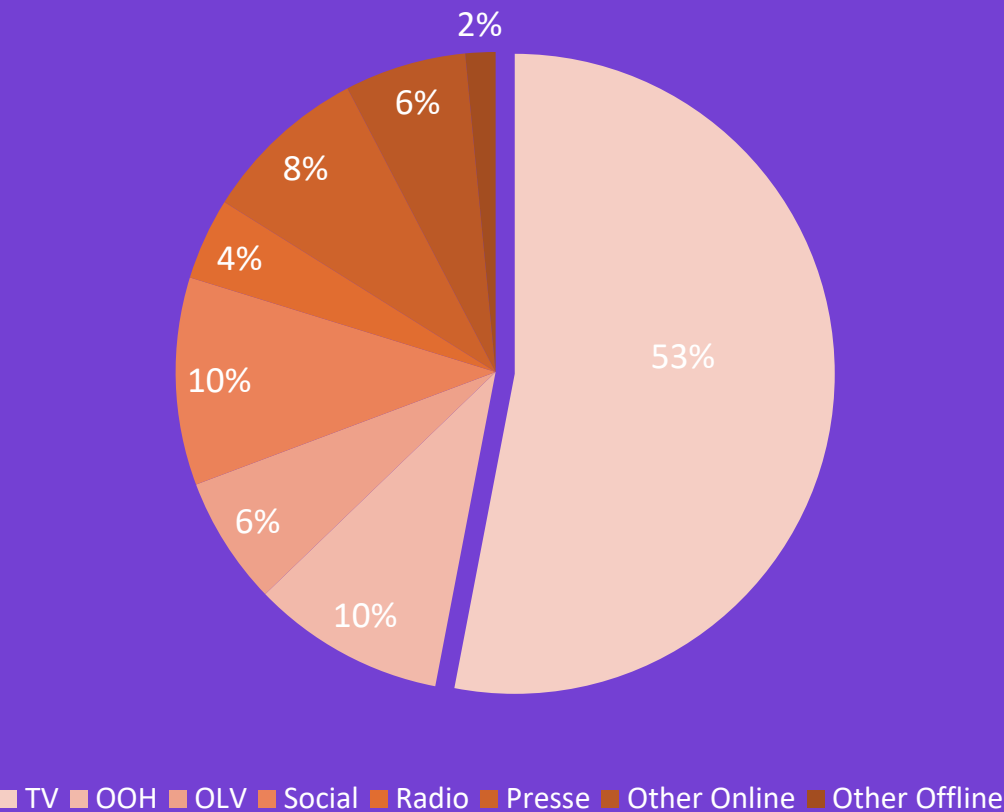
ROE (RETURN ON EQUITY) ANALYZES BRAND IMAGE IMPACT. IT MEASURES THE IMPACT ON THE BASELINE USING TOP-OF-FUNNEL INDICATORS.

The Baseline, foundation for long-term performance

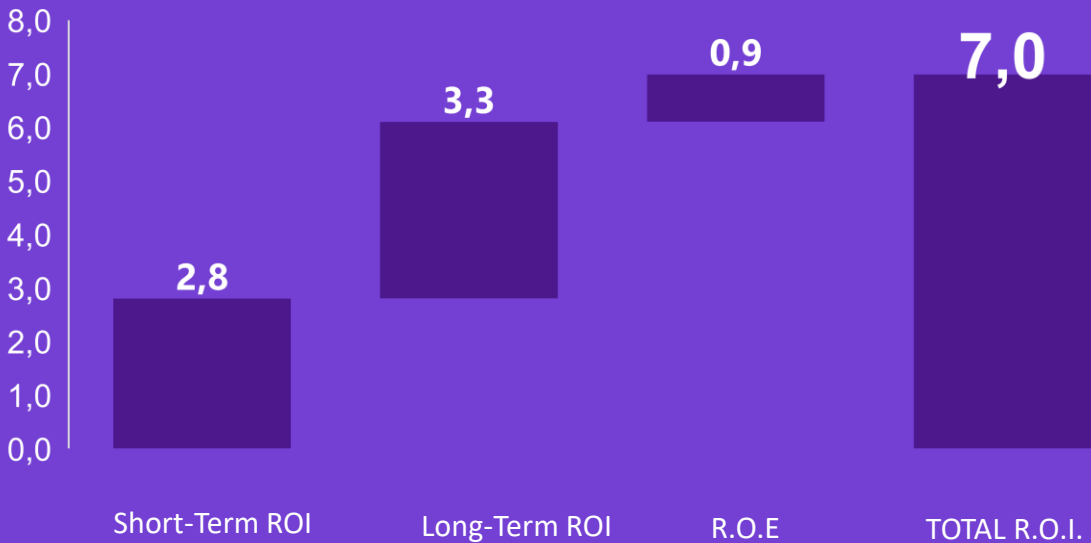


R.O.E: ALL SECTORS – BREAKDOWN OF THE IMPACT OF TV/STREAMING

MEDIA CONTRIBUTION TO R.O.E.



BREAKDOWN OF THE IMPACT OF TV/STREAMING



○ TV/STREAMING accounts for 53% of the media's impact on equity. Across all these sectors, R.O.E accounts for 13% of the impact of TV/STREAMING on sales.

R.O.E: TV/STREAMING CONTRIBUTES MORE THAN HALF TO BRAND EQUITY, THANKS TO ITS HIGH R.O.E. AND I.P. SHARE.



53% TV sales contribution
0,9 TOTAL R.O.I
34,8% Share of Investments

CONTRIBUTION AU R.O.E EN %

Cross-sector: Finance, Healthcare, Media, Retail, Automotive, FMCG, Technology, Mobility, Hospitality & Leisure, Cosmetics & Beauty, Luxury Goods



Bubble size proportional to investments



R.O.E.: DETERMINING FACTORS AND WEIGHT BY SECTOR



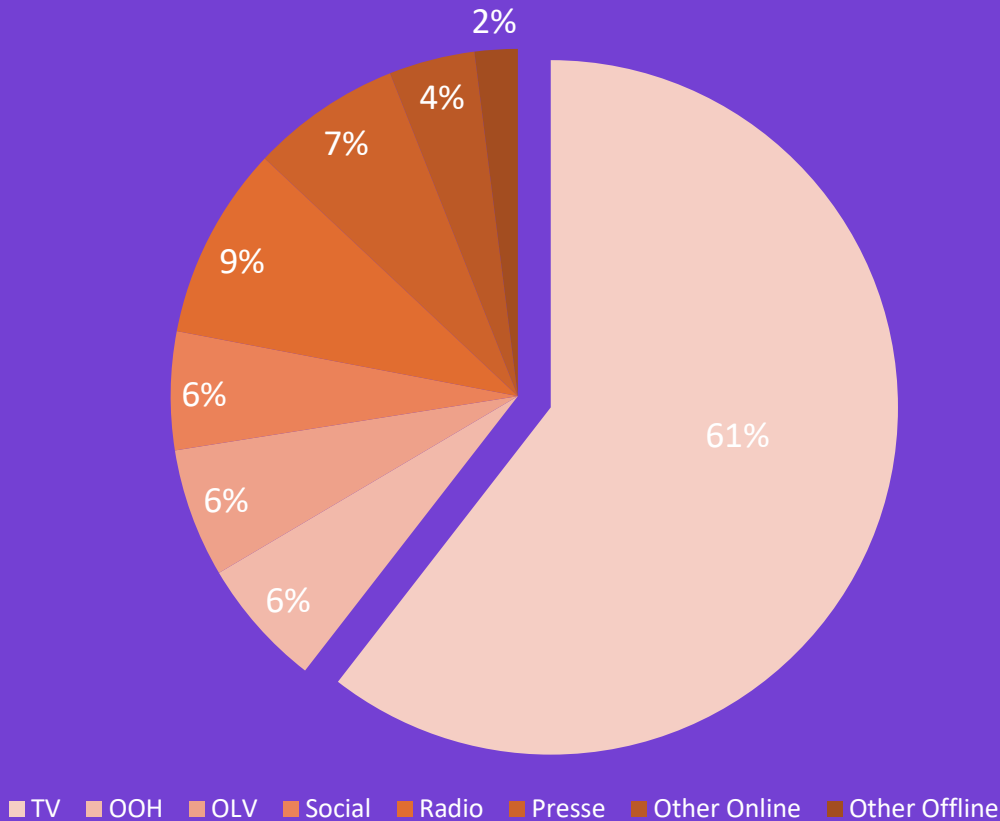
The share of ROE in the total impact of the media varies across sectors and depends on several parameters:

- A high baseline weight implies a lower contribution of the media to short-term sales and a stronger ROE weight.

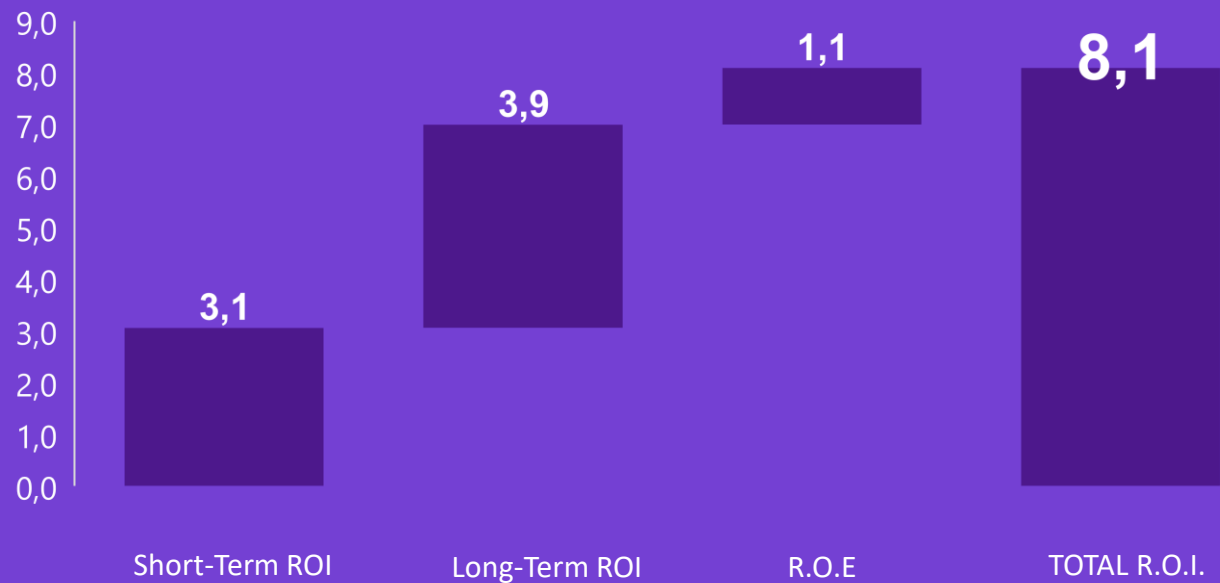
A more competitive environment with a large number of players gives greater importance to ROE. An expensive product with a long lifespan also implies a higher ROE weighting.

AUTOMOBILE: BREAKDOWN OF TV/STREAMING IMPACT - R.O.E.

MEDIA CONTRIBUTION TO R.O.E.



BREAKDOWN OF THE IMPACT OF TV/STREAMING



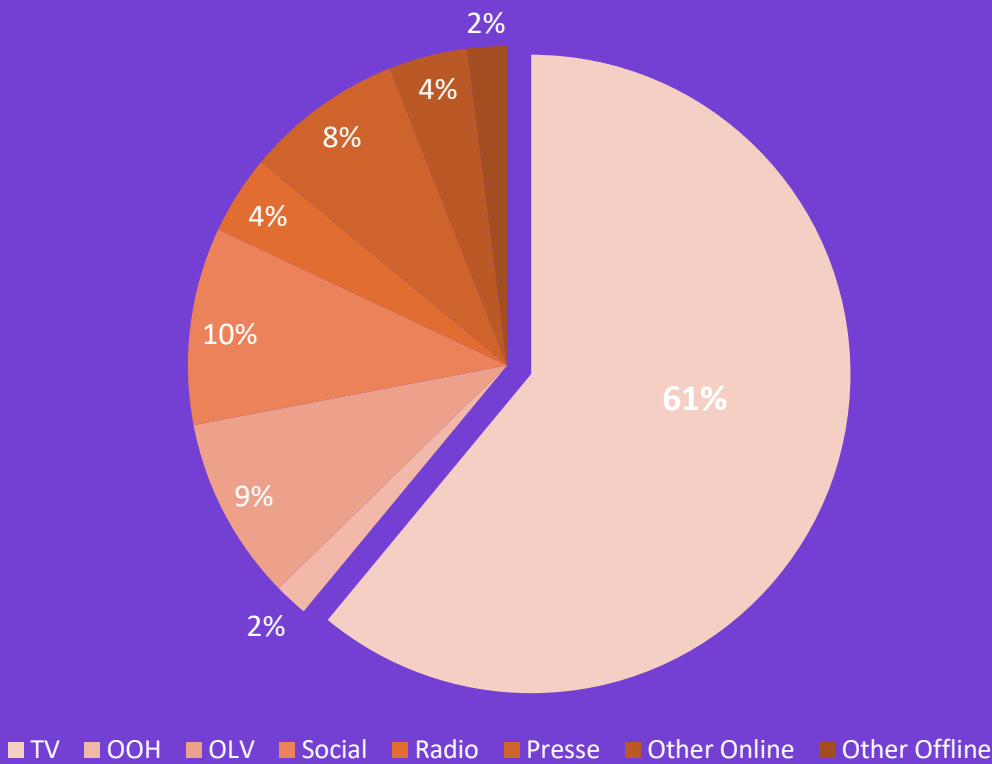
○ TV/STREAMING accounts for 61% of the media's impact on equity.

Across all these sectors, R.O.E accounts for 14% of the impact of TV/STREAMING on sales.

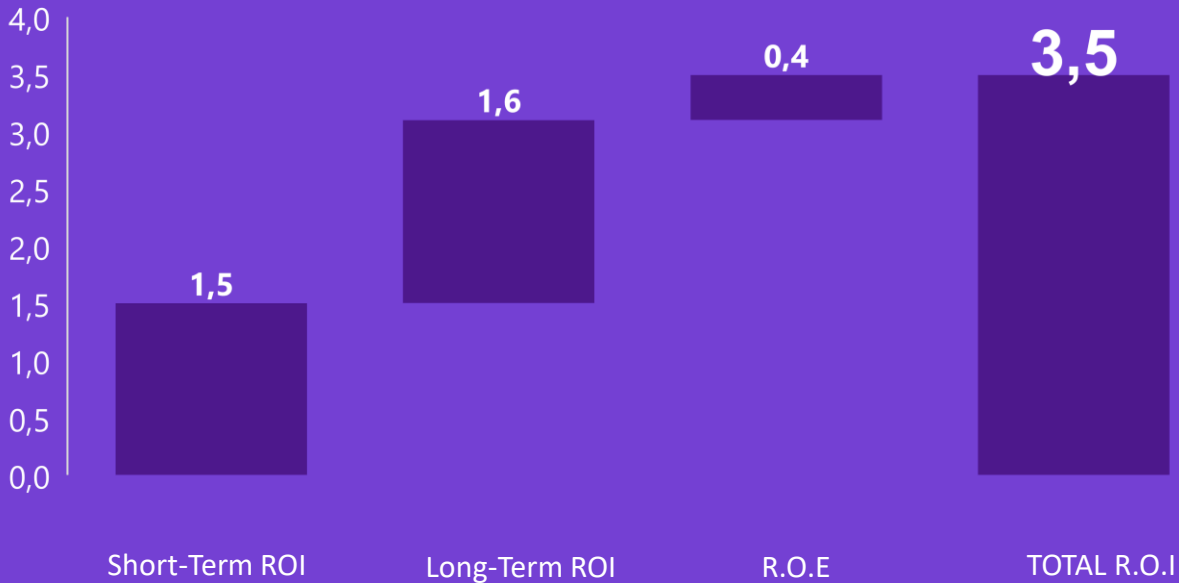


CPG: BREAKDOWN OF TV/STREAMING IMPACT - R.O.E.

MEDIA CONTRIBUTION TO R.O.E.



BREAKDOWN OF THE IMPACT OF TV/STREAMING

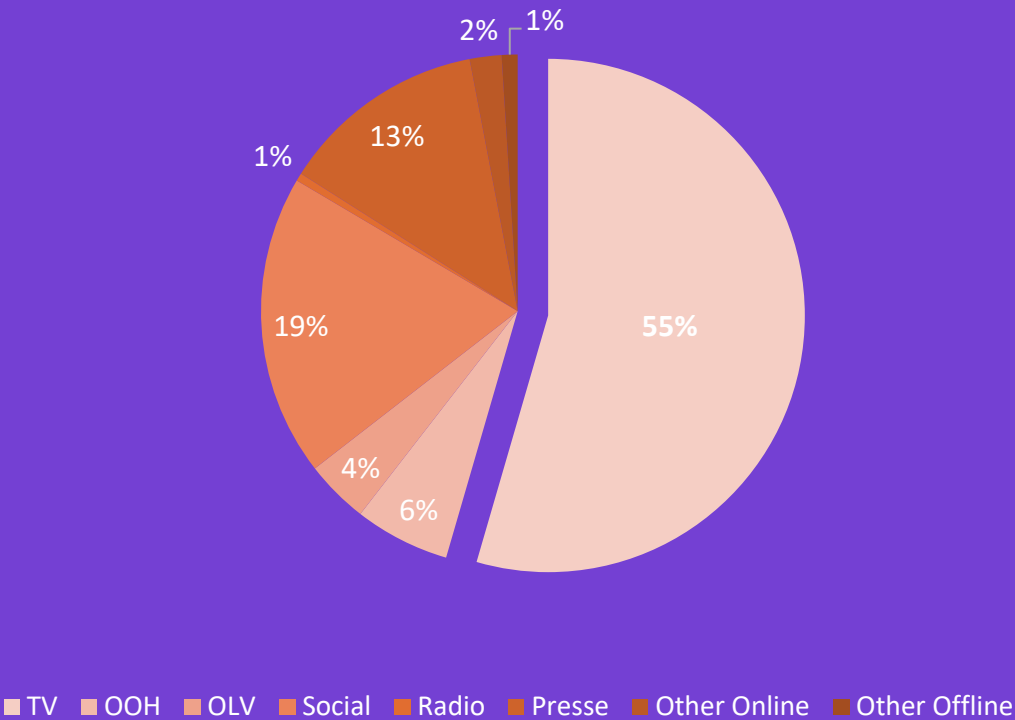


○ TV/STREAMING accounts for 61% of the media's impact on equity.

For the FMCG sector, ROE accounts for 11% of the impact of TV/STREAMING on sales.

PREMIUM COSMETICS : BREAKDOWN OF TV/STREAMING IMPACT - R.O.E.

MEDIA CONTRIBUTION TO R.O.E.



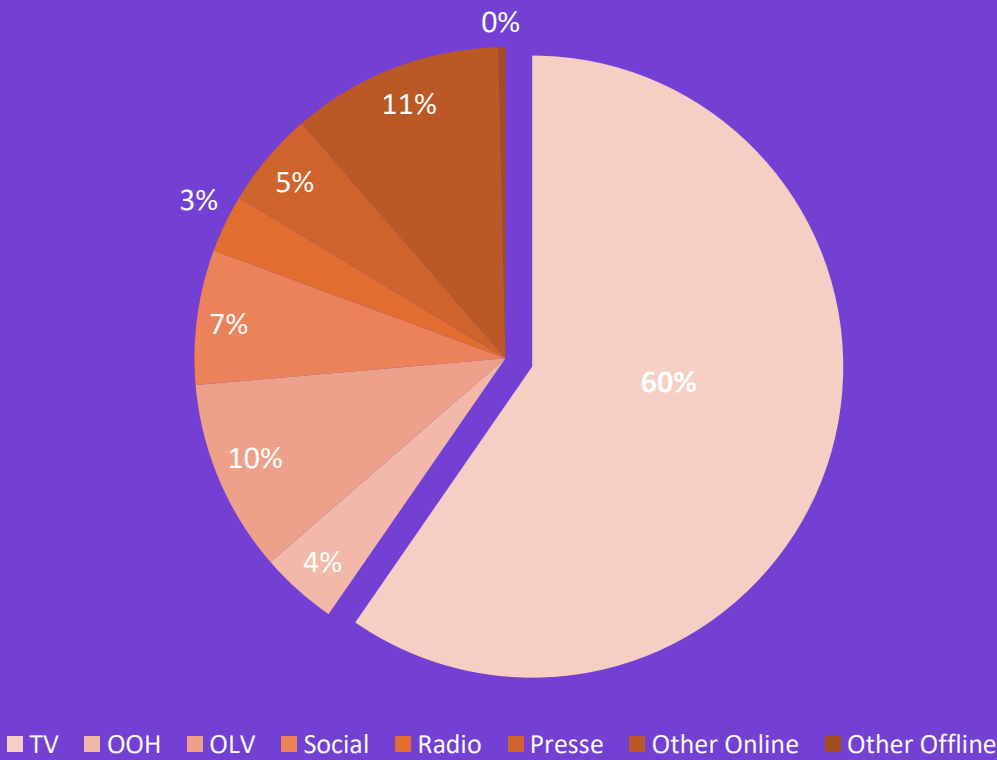
BREAKDOWN OF THE IMPACT OF TV/STREAMING



- TV/STREAMING accounts for 55% of the media's impact on equity.
For the Beauty sector, ROE accounts for 15% of the impact of TV/STREAMING on sales.

FINANCE: BREAKDOWN OF TV/STREAMING IMPACT - R.O.E.

MEDIA CONTRIBUTION TO R.O.E.



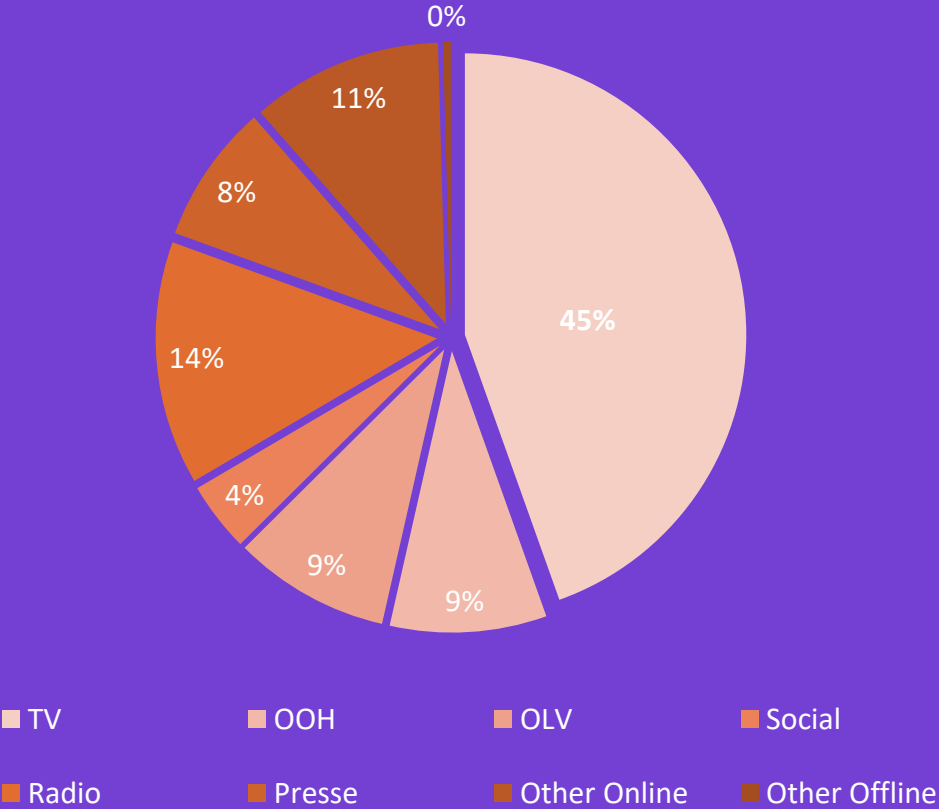
BREAKDOWN OF THE IMPACT OF TV/STREAMING



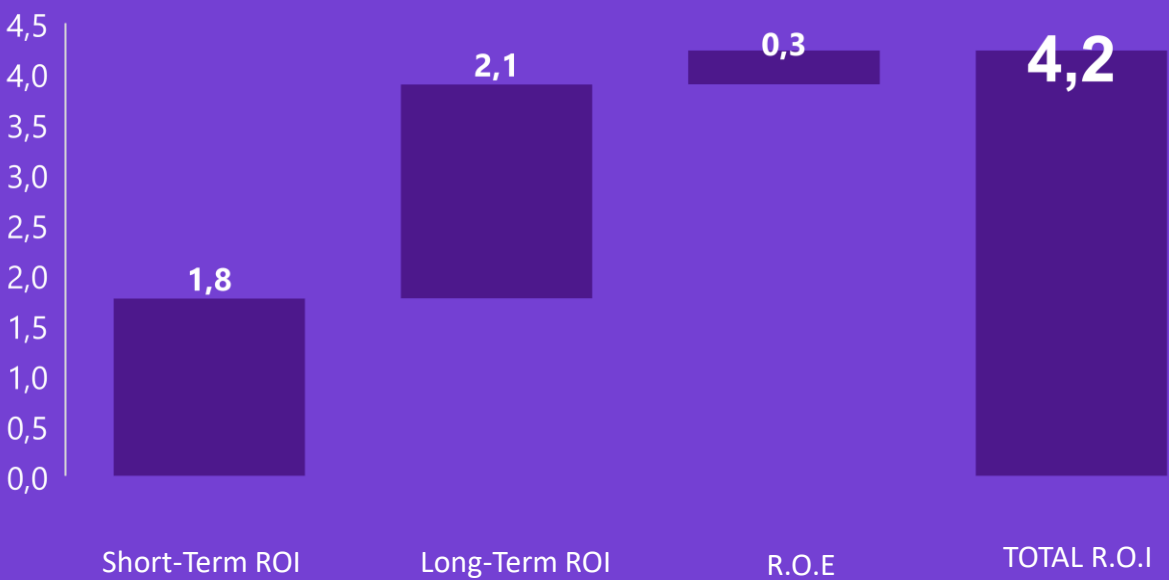
- TV/STREAMING accounts for 60% of the media's impact on equity. For the finance sector, ROE accounts for 20% of the impact of TV/streaming on sales.

E-COMMERCE: BREAKDOWN OF TV/STREAMING IMPACT - R.O.E.

MEDIA CONTRIBUTION TO R.O.E.



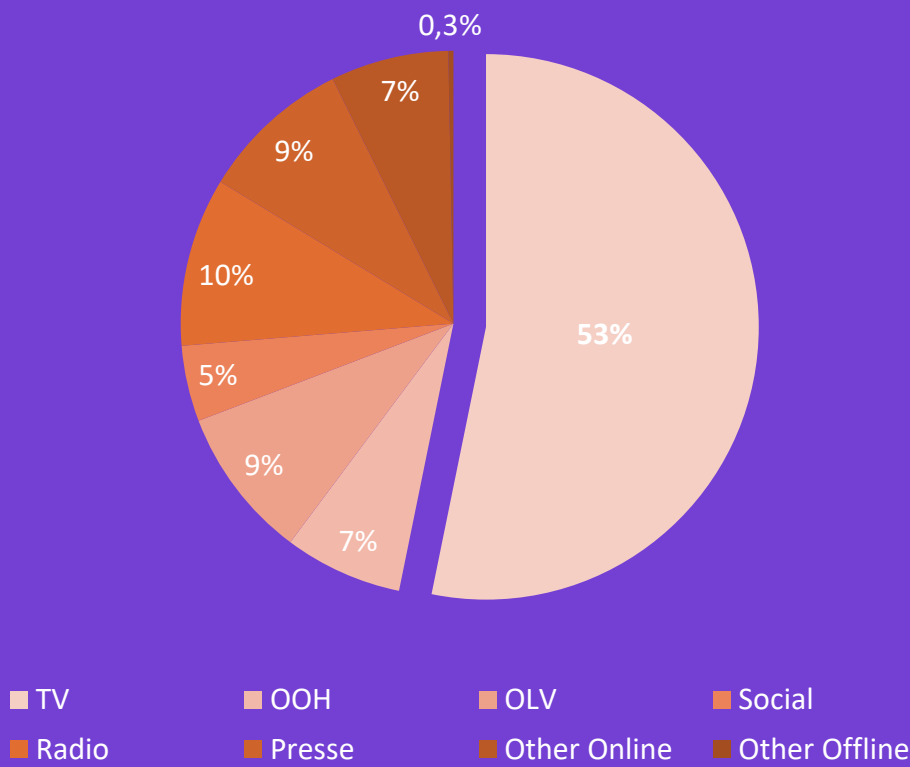
BREAKDOWN OF THE IMPACT OF TV/STREAMING



○ TV/STREAMING accounts for 45% of the media's impact on equity. For the e-commerce sector, ROE accounts for 8% of the impact of TV/streaming on sales.

SELECTED RETAIL : BREAKDOWN OF TV/STREAMING IMPACT - R.O.E.

MEDIA CONTRIBUTION TO R.O.E.



BREAKDOWN OF THE IMPACT OF TV/STREAMING



○ TV/STREAMING accounts for 53% of the media's impact on equity. For the Specialized Distribution sector, R.O.E represents 11% of the impact of TV/STREAMING on sales.

4

OTHER ZOOMS

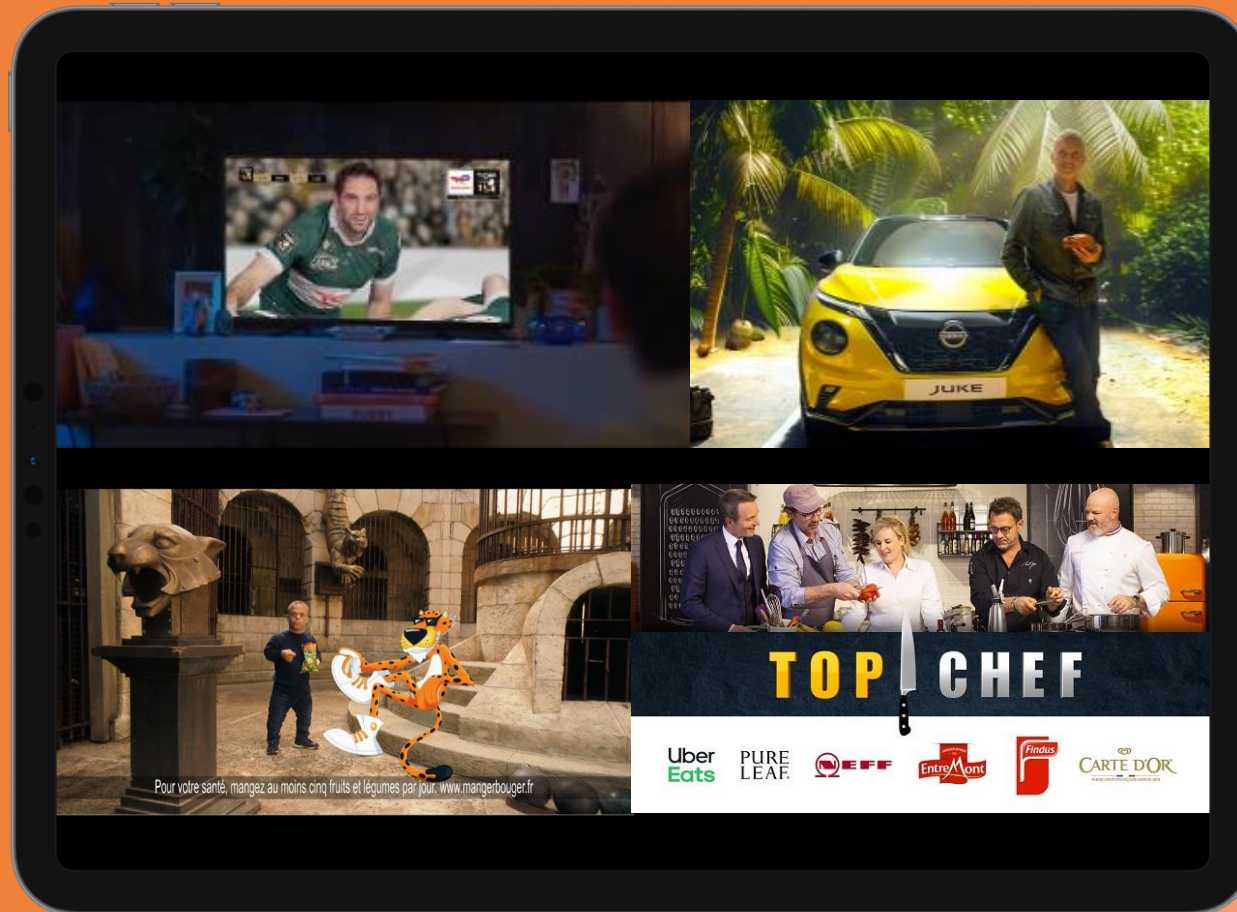
Sponsorship

Synergy

R.O.I International



SPONSORSHIP : ALTERNATIVE TO TV WITH AN OUTPERFORMING R.O.I.



TV SPONSORSHIP

6,7

TOTAL R.O.I.
(SHORT + LONG TERM)

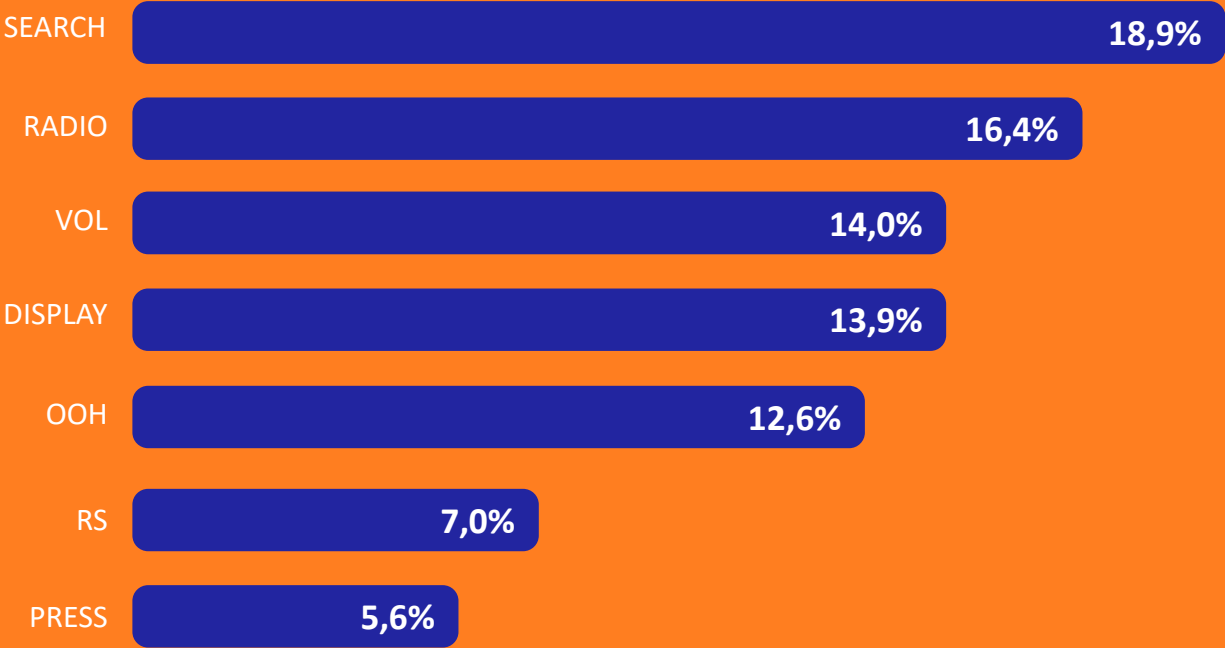
- TV sponsorship available on most major channels
Alternative for committing smaller budgets or better targeting your audience
Generally offers comparable or even better effectiveness than traditional TV thanks to its lower cost.

MULTIPLIER EFFECT OF TV/STREAMING ON OTHER LEVERS:

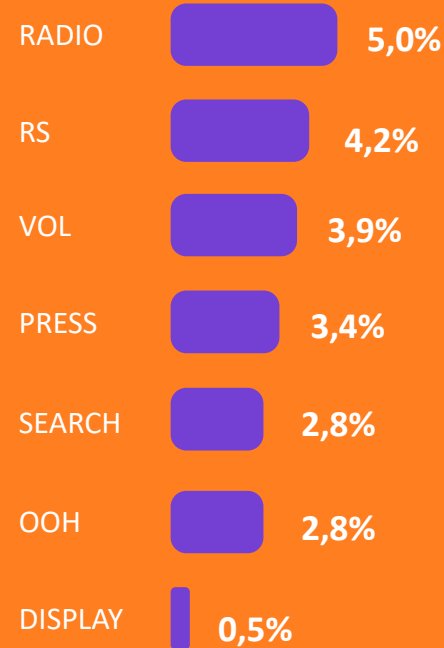
SYNERGY

AVERAGE EFFICIENCY GAIN OF 14% FOR OTHER MEDIA WHEN TV/STREAMING IS PLAYED

ROI gains for other media when TV/BVOD is played

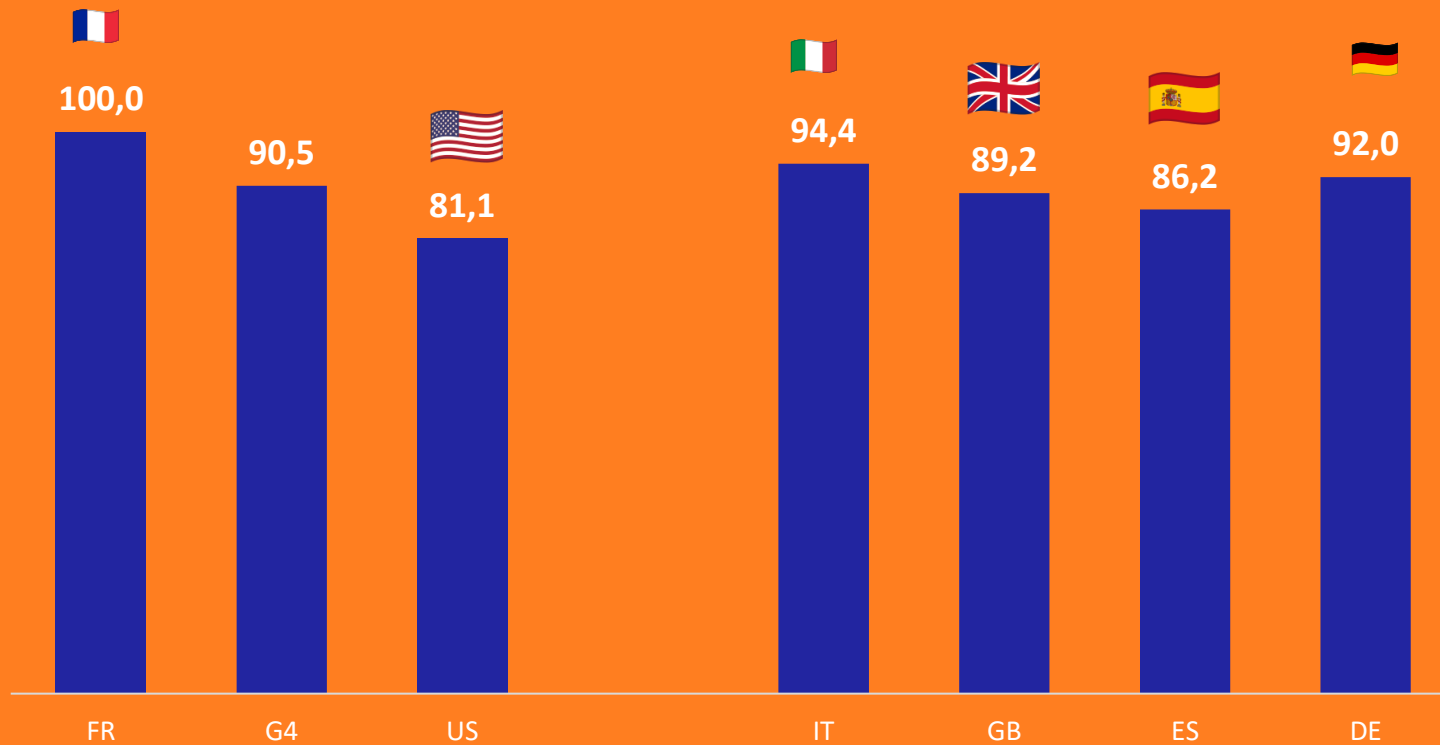


Average efficiency gains for TV/streaming when played alongside other media:



THE R.O.I OF TV IN FRANCE IS BETTER THAN THAT OF OUR EUROPEAN NEIGHBORS

Scope: France & G4 / 10 sectors – 2022 / 2024



TV offers a higher ROI in France than in the G4 countries and even in the US:

- The ROI of linear TV remains stable and is less affected by the fragmentation of digital offerings (particularly strong in the US and UK).
- A lower CPM than in other countries: 30% vs. Spain, 70% vs. Germany, and double that in the UK.

Germany: > 50 cases

Italy: > 50 cases

Spain: > 50 cases

UK: > 100 cases

France: > 200 cases

CONCLUSION

#ROITV6

IMMEDIATE EFFECTS
AND
LASTING RESULTS



CONTRIBUTION TO SALES

41%

of the media's
contribution comes
from TV/streaming

35% of media
investments

R.O.I

6,1

of revenue for every
€1 invested in
TV/streaming

R.O.E

0,9

That's 13% of the
impact of
TV/streaming on sales.

SYNERGY

+14%

increased
effectiveness of other
media

That's an additional
€0.9 in ROI.

R.O.I. IN FRANCE

+10%

VS. Italy, Germany,
Spain, UK, USA



The logo consists of a white circle on a dark blue background. The text "alliance des médias tv video" is written in a white, sans-serif font, with "alliance des" on the top line and "médias tv video" on the bottom line. The text is positioned to the right of the white circle, with the word "médias" partially overlapping the circle's edge.

**alliance des
médias tv video**