



IPSOS VIEWS

CAMPAIGN EFFECTIVENESS IGNITED

Unlocking cross-media synergy
with TV and social media

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The Wanamaker riddle in a modern maze

In this paper, we tackle two fundamental questions advertisers keep asking themselves. The first is a classic, echoing through the halls of advertising for over a century. It was first articulated by the legendary John Wanamaker, a pioneer often called the father of modern advertising, who famously said: “Half the money I spend on advertising is wasted; the trouble is I don’t know which half.” It’s a sentiment that feels just as true today, even in an era he never could have imagined. This enduring question remains at the heart of every marketing discussion: **How can I measure campaign success holistically to understand its impact and effectiveness?**

While the question hasn’t changed, the world of media and measurement certainly has. The complexity of tracking campaign effectiveness has grown exponentially, not just over the last century, but in the last decade alone. Today’s media landscape is a vibrant, fragmented, and ever-expanding universe. This creates a vast playground for advertisers, with a growing palette of ad formats and creative avenues to capture attention. This explosion of choice leads us directly to the second key question we’ll explore, offering fresh insights from our latest analysis: **Where should I invest my advertising budget to achieve my campaign goals?**

The great media shake-up: Where are the ad dollars going?

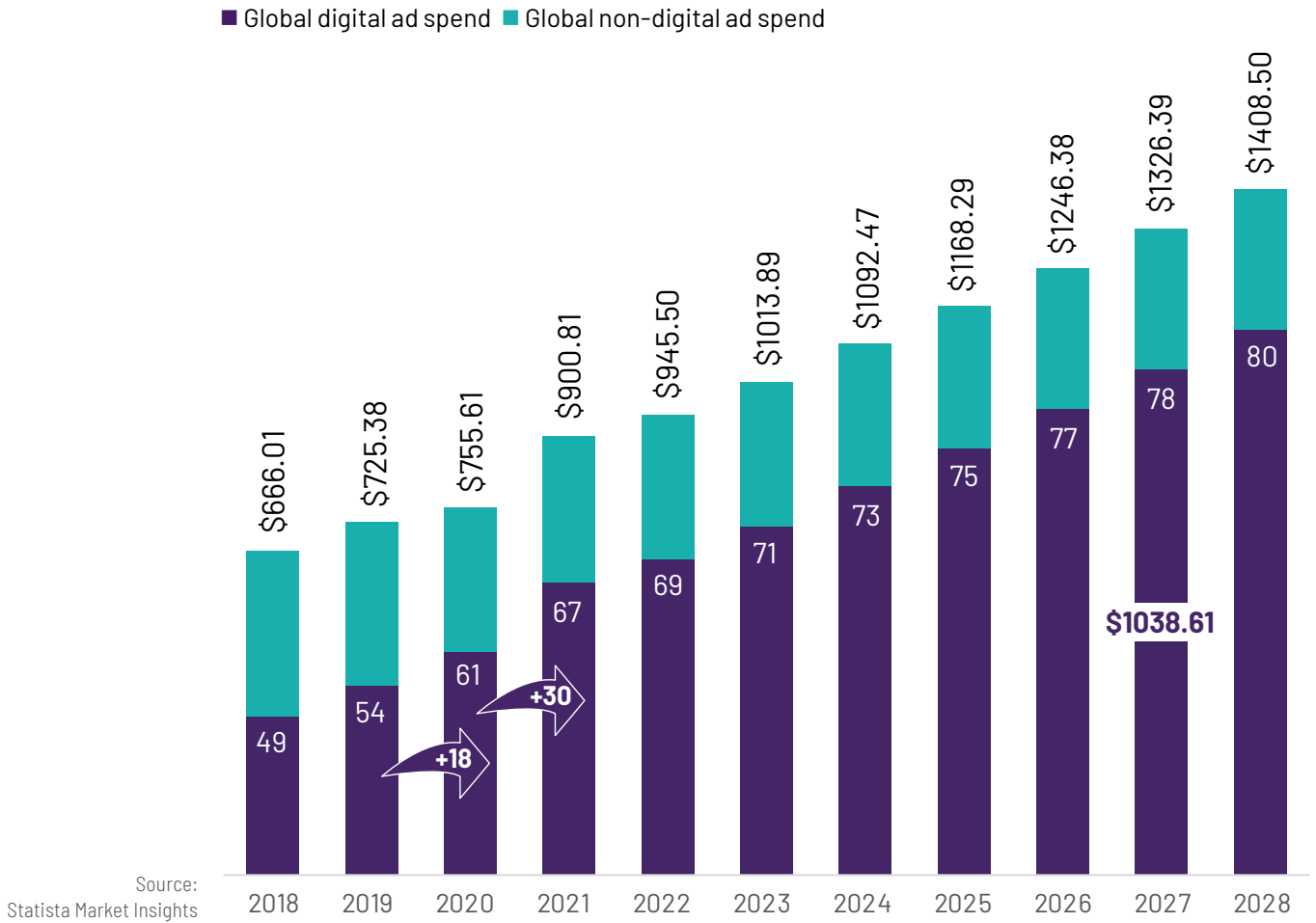
Despite global uncertainties, the advertising industry is not just surviving; it’s thriving. According to Statista¹, it has already surpassed the staggering one trillion US dollar mark, with forecasts expecting it to reach \$1.4 trillion by 2028. The engine powering this incredible growth is, without a doubt, digital advertising. While the shift to digital was already well underway, the pandemic acted as a massive accelerator, pushing digital ad spending up by 18% in 2020 and an incredible 30% in 2021. This surge cemented digital’s dominance, expected to crack the trillion-dollar mark in 2027 and its share of total ad spend to hit 80% in 2028. So, what’s behind this phenomenal growth?

It comes down to a powerful combination of three key advantages: precision, proof, and price. Digital offers precise targeting capabilities that were once unimaginable, the ability to measure results with granular clarity, and a cost-effectiveness that has democratised the entire industry. This shift means that advertising is no longer just the domain of big-spending national brands. The efficiency of digital media allows local high-street shops and niche service providers to connect with their consumers in a meaningful and affordable way. Add to this the constant innovation in high-growth formats like programmatic, search, and retail media, and it’s clear why digital advertising has become such an irresistibly attractive way to connect with consumers.



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Figure 1: Total ad spending worldwide, billions, % share of digital ad spend and % change



Source: Statista Market Insights



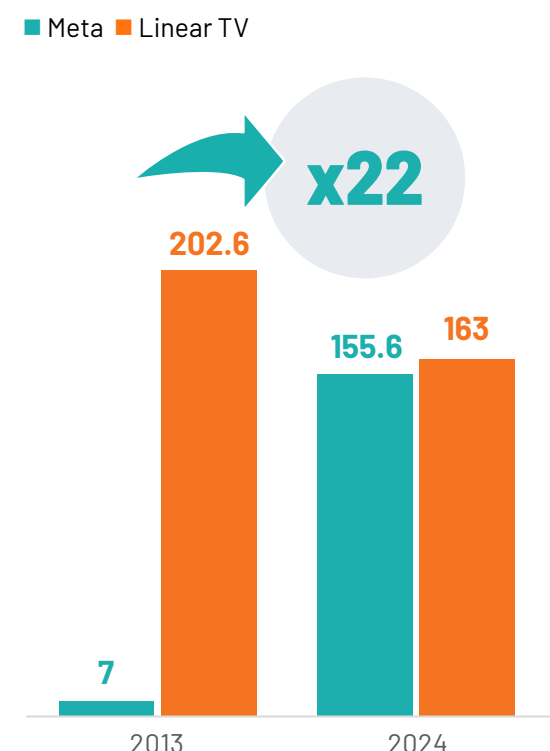
In a nutshell, the digital boom has created a fiercely competitive and fragmented landscape.

The real story, however, is the meteoric rise of social media, driven by the widening appeal and accessibility to a broader range of advertisers, particularly small and medium sized businesses. Social media is now the largest channel for advertising investment globally, and its growth is accelerating. Leading this charge is Meta. In a stunning display of this new media order, Meta's ad revenue is on track to surpass the entire global linear TV ad spend in 2025². To put this in perspective, in 2013, linear TV ad revenue was over \$200 billion, while Meta's was a mere \$7 billion. The fact that a single digital player has closed this gap in just over a decade (each now around \$160 billion) perfectly encapsulates the dramatic transformation of the media landscape.

So, what does all this mean for campaign media planning and campaign effectiveness measurement? In a nutshell, the digital boom has created a fiercely competitive and fragmented landscape. While the explosion of platforms offers more opportunities to connect with the right people at the right moment with the right message, it has also made

measurement infinitely more complex. It's like the modern version of the Wanamaker riddle, played out across countless platforms and screens.

Figure 2: Global ad spend, USD Billions (current prices)



The new battleground: consumer behaviour

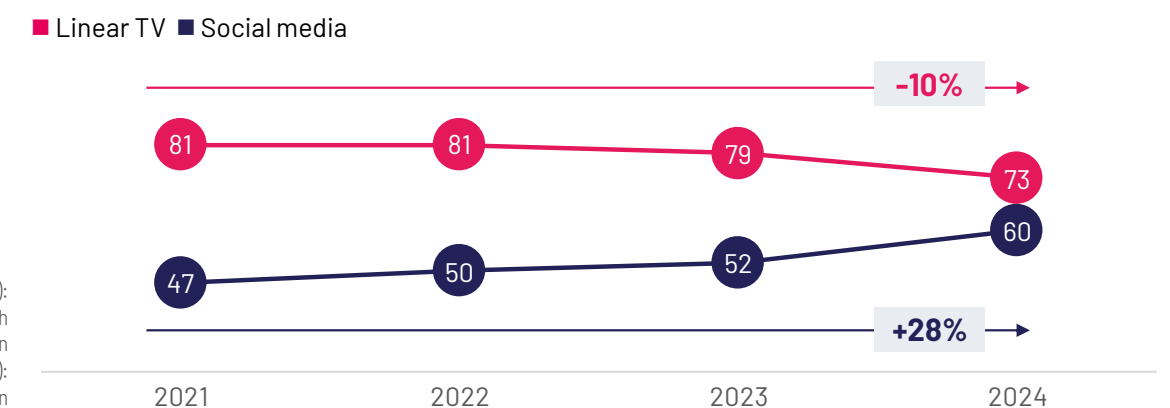
This is the reality of the attention economy: a new battleground where brands are no longer just competing with other brands, but also with every piece of content, notification, and distraction vying for a slice of a person's day. Consider the rapid-fire media switching in a single typical day. It's a journey that might start with a news podcast on the morning commute, jump to work emails, break for a TikTok scroll, pivot to online search and shopping, and end with a streamed movie while simultaneously catching up on social media – a constant dance between screens, platforms, and mindsets.

And this isn't just a feeling. A Deloitte study³ found that US consumers now dedicate about six hours daily to media and entertainment, juggling content across numerous platforms and devices. The fact that they hold an average of four different video-on-demand (VOD) subscriptions is a clear indicator of this deep media fragmentation. This reality has also solidified the new norm of 'screen stacking' – the habit of using multiple devices at once – which highlights the

sharp decline in dedicated viewing time and fuels the intense competition for a moment of a consumer's attention.

This fundamental change in the advertising landscape is a direct reflection of a massive shift in how people spend their time. To see this in action, let's look at Germany – the world's fifth-largest advertising market and an excellent proxy for similar trends in other countries. The data paints a clear picture of two powerful, opposing currents. On one side, the weekly use of linear TV has seen a significant decline, dropping from 81% in 2021 to 73% just three years later in 2024⁴. At the same time, social media has been on a relentless climb. Its weekly use surged from 47% in 2021 to 60% in 2024⁵ – a remarkable +28% growth in just three years. But here is the critical insight for any media planner: while these trends perfectly mirror the shifts in ad spending, it's crucial to look at the complete picture. From a consumer usage perspective alone, traditional TV still has a stronger overall reach than social media. The king may be losing ground, but he hasn't been dethroned just yet.

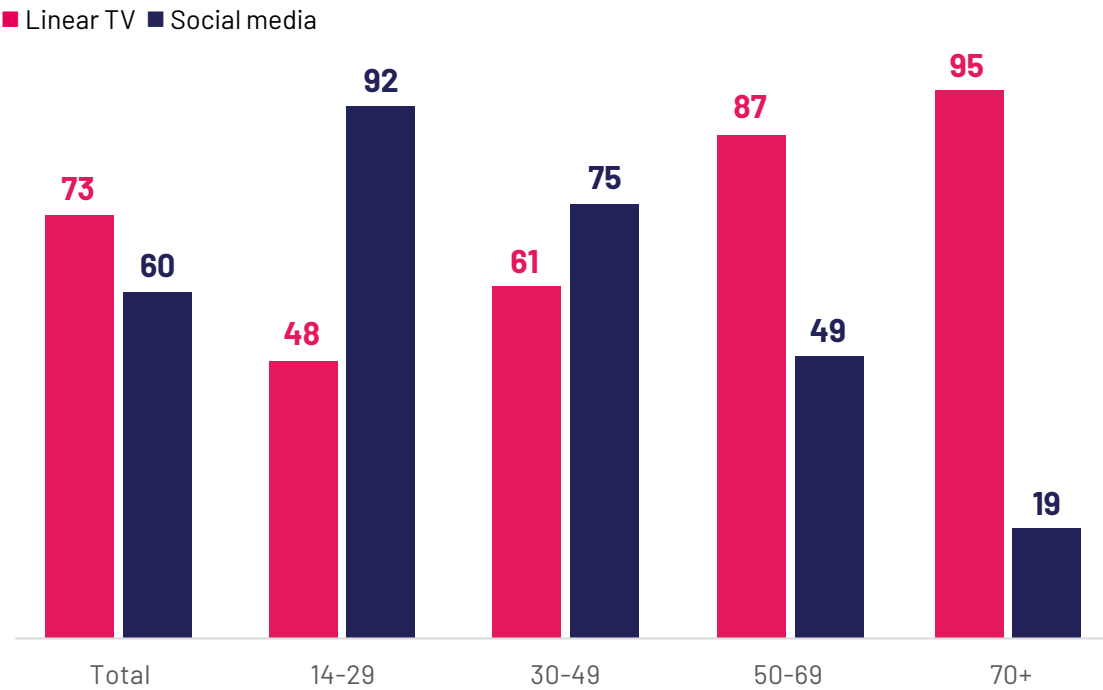
Figure 3: Germany – weekly use of linear TV and social media in %, 2021-2024



However, this is where the data offers incredible strategic clarity. While TV may have the broader weekly reach overall, a clear generational divide reveals where different audiences truly live. Social media is the undisputed domain of younger consumers, with 92% of the 14-29 age group using it at least once a week. In sharp contrast, engagement falls to 49% for those aged 50-69 and becomes

a far more niche activity for the 70+, at only 19%. This isn't a weakness in one channel or another: it's a roadmap. It underscores that the most effective media strategy is built not on which channel is "best", but on which channel is best for reaching your specific audience. Again, while these figures are from Germany, this generational pattern is a powerful directional trend across nearly all markets.

Figure 4: Germany – weekly use of linear TV and social media in % across age groups, 2024



Source: ARD/ZDF Research Commission

This consumer-driven roadmap presents a massive opportunity to connect with people in more meaningful and contextually relevant ways than ever before. But it also reframes the central challenge. It's no longer just about knowing where your audience is, but understanding

their mindset in that specific moment to deliver the perfect creative. This leads us directly to the ultimate question, which we will tackle next: In a world of scattered touchpoints, how to measure their collective impact to prove – and improve – your campaign's success.

Media lingo



Traditional media: All forms of mass communication that existed before the rise of the internet and digital platforms.



Digital media: All media accessible via the internet, including streaming, audio and social platforms and mass media that are now distributed digitally, such as DOOH and digital radio.



Linear TV: The traditional, linear, scheduled broadcasting of television content via cable, satellite, antenna, or IPTV apps like Zattoo, MagentaTV, or Pluto TV. The definition is based on the viewing behaviour, where viewers watch programmes at a set time according to a fixed schedule, no matter the device used for watching. Traditional TV doesn't cover streaming apps (e.g. Netflix or Disney+) to watch on-demand content or catch-up/time-shifted content outside the original broadcast schedule.



Social media: Digital platforms and apps that enable users to create, share, and interact with content and other users, such as Facebook, Instagram, and TikTok. It also covers social video/streaming platforms such as YouTube or Twitch. It doesn't cover messenger apps, such as WhatsApp.

Under the hood: our approach to the analysis

To answer that first ultimate question – **how to measure the collective impact of scattered touchpoints in today's campaigns** – we are applying our cross-media measurement solution Campaign Effect. In a media landscape that is more fragmented than ever, advertisers are no longer asking if they should use multiple channels, but how they can prove the value of each one. Campaign Effect is designed to answer this very question by moving beyond siloed reporting and providing a holistic, yet granular, view of performance. It addresses the core challenge of the fragmented media landscape, it connects creative performance with media behaviour, isolates the impact of individual media to brand KPIs, and provides tactical as well as strategic insights to inform both short-term campaign optimisation and long-term brand strategy.

To answer the second ultimate question – **where to invest my advertising budget to achieve my campaign goals** – we grounded our analysis in the real world, which required a clear scope and a robust dataset. First, let's define our terms. For this paper, a "cross-media" campaign is any campaign running on at least two different media channels. This includes combinations across different media types (like linear TV and any social media), as well as campaigns using multiple platforms within the same media type (like Meta and YouTube). Our analysis is built on a deep dive into 50 real-world cross-media campaigns from various markets that ran between 2022 and 2024. We deliberately

chose this recent two-year window because the media landscape is evolving at lightning speed, making older data a less reliable guide for the immediate future.

This dataset was curated to be a snapshot of today's real-world campaign landscape, not just a highlight reel of the biggest ad spenders. We intentionally included a diverse mix, from large-scale campaigns with broad reach to smaller, tactical campaigns targeting niche audiences. The result is a rich and varied dataset spanning 18 product categories, 15 countries, and capturing the voices of over

47,000 consumers. Reflecting current ad spending trends, every campaign in our analysis is cross-media with a digital and social component at its core, though not all extend their mix to include traditional media. To keep our analysis tightly focused, all 50 campaigns also shared a common primary objective: to increase brand awareness and activate brand consideration. While these efforts undoubtedly contribute to long-term brand health, our measurement for this study is centred on the short-term KPIs that reflect immediate changes in consumer attitudes and behaviour.



Connecting the dots: a holistic framework for cross-media measurement

At the heart of any effective campaign is a powerful synergy between three core elements: the audience you want to reach, the media you use to reach them, and the creative that carries your message. Understanding how these three elements work in harmony isn't just a theoretical exercise; it's the fundamental principle behind our Campaign Effect measurement solution.

01 Role of the audience:



Understanding the audience is essential for targeting efforts and ensuring that the campaign reaches those most likely to engage with the brand. This involves identifying which media channels are favoured by the target demographic and understanding the various use and need states of consumers as they engage with different media. The interplay between media and audience is crucial; aligning media choices with audience preferences ensures that the message reaches the intended recipients effectively.

02 Role of the media:



The media landscape is vast and varied, serving multiple purposes in a campaign. Whether the goal is brand awareness, customer engagement, or direct conversion, different media channels are suited for different objectives. Achieving campaign success often involves a strategic combination of media channels, maximising their strengths and compensating for their weaknesses. Furthermore, prudent budget allocation is critical - ensuring

that investments are distributed to align with campaign goals and achieve maximum impact.

03 Role of the creative:



The creative component of a campaign is where the brand's message comes to life. It's about delivering the right message to the right people at the right time on the right channel. Not only does the creative need to be compelling and relevant, but it also must be optimised for the specific audience and media platform. This includes tailoring the content to fit the unique formats and user experiences of each platform - ensuring that the campaign resonates across all touchpoints.

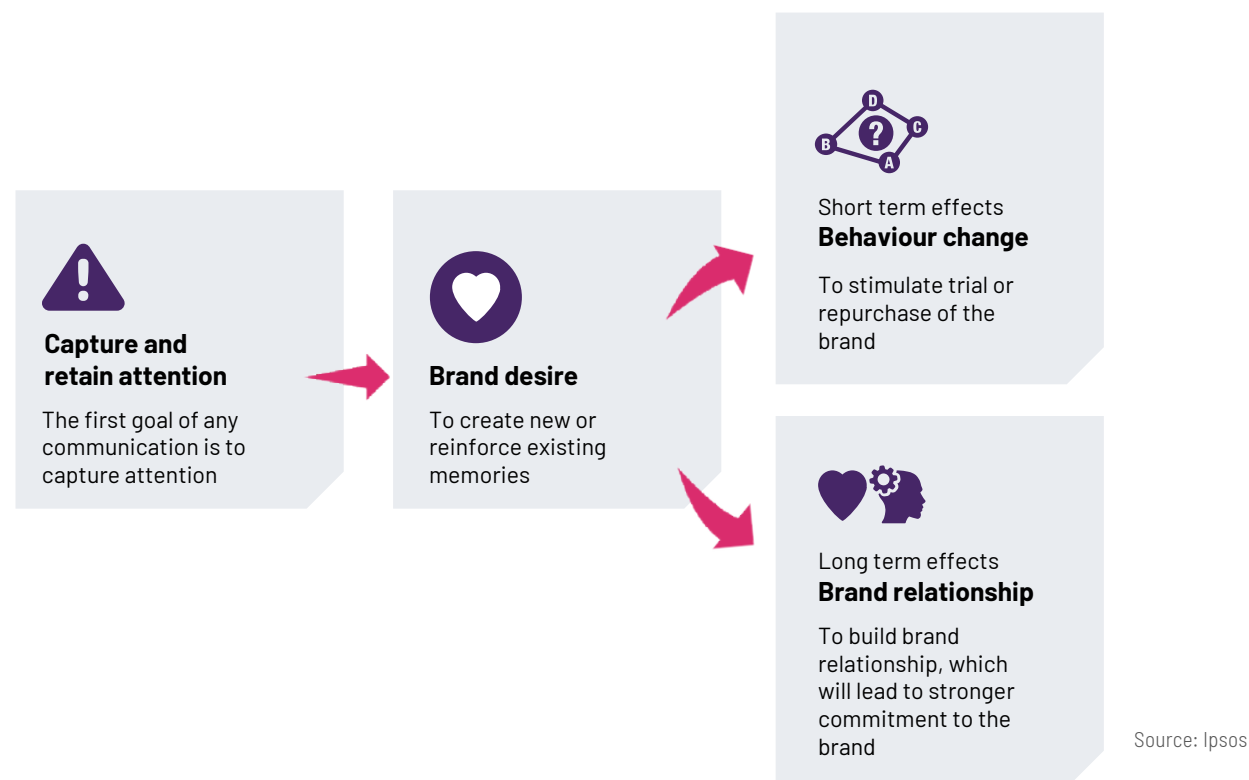
Together, these three elements form the backbone of an effective ad campaign.

From attention to action: Ipsos campaign effectiveness metrics

Effective brand communication starts with campaign creatives that are powerful enough to **capture and retain attention**. This enables the brand to be salient in consumers’ minds, it can create new memories or reinforce existing ones, which impacts brand desire. **Brand desire** can be twofold. It can stimulate trial or repurchase of the brand, which has a short-term effect on **behaviour change**, or it can build a brand relationship, leading to stronger brand loyalty, which has a long-term effect on **brand relationships** and **brand building**.

Now that we’ve established our holistic framework and effectiveness metrics, we have the answer to the first ultimate question: **How can I measure campaign success holistically to understand its impact and effectiveness?** With that crucial foundation in place, we can now pivot to the second key question on every marketer’s mind: **Where should I invest my advertising budget to achieve my campaign goals?** In the next section, we will dive into the data-backed findings from our analysis, which we hope will serve as a source of inspiration and practical guidance as you refine your media planning and drive campaign success.

Figure 5: Ipsos campaign effectiveness metrics



Metrics playbook

Memorable attention: People have seen the ad and processed, so encoded into their mind, measured via creative recognition. Memorable attention is beyond exposure measurement (ad delivered to device) and attention (eyes on screen).

Reach: Unique exposures amongst the campaign audience, reported as % in the media plan.

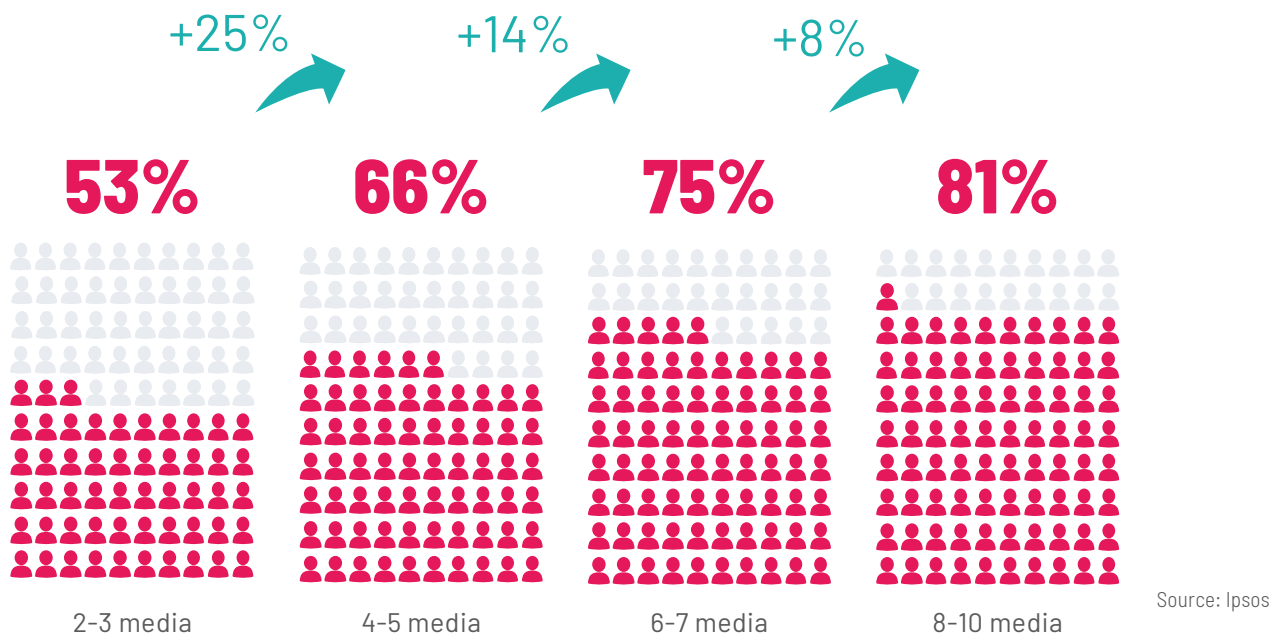
Potential reach: Translated reach from the media plan to the survey sample based on probability of campaign exposure across different media.

Multiply to magnify: multiple media boost campaign reach

So, how do you best reach people in this fragmented world? The answer starts with a foundational principle: the number of media channels in your media plan is a key driver of your potential reach. There is the allure for only one or very few media channels in the media mix, because it is much simpler to plan, execute and measure. The downside of that simplicity is, if you don't reach people, they cannot pay attention to your campaign, and you cannot have an impact. And therefore, campaign reach is extremely important for campaign success. We've already established that consumers are scattered across a vast media universe, with different target

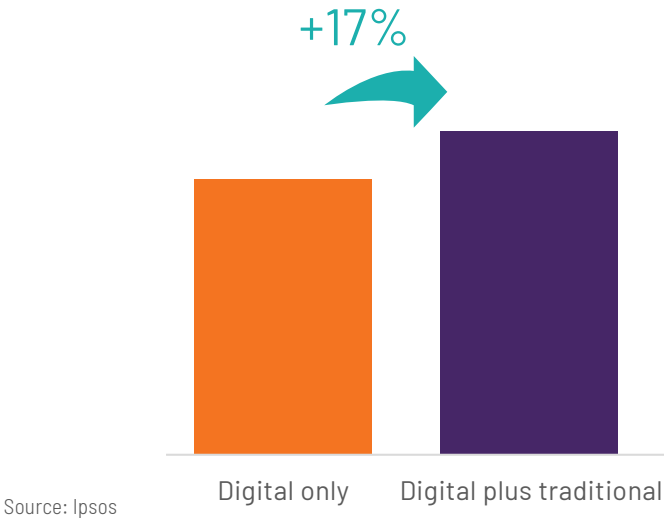
groups preferring different media. This leads to a fundamental strategic choice that should be guided by your campaign's primary goal. If your objective is to cast the widest possible net – for instance, to build broad awareness for a new product – then the logic is clear: consider deploying a wider selection of different media. However, this doesn't mean simply adding channels blindly. Ensure your media selection is perfectly aligned with your audience's preferences, and critically, balance the number of channels with your budget, ensuring each one has sufficient investment to achieve a meaningful reach on its own.

Figure 6: Potential reach across number of media in the media mix



Better together: traditional media is a powerful amplifier

Figure 7: Potential reach across campaign types



The central question in media planning has now officially flipped. For years, the debate was about whether digital channels deserved a seat at the table. Now, the conversation has shifted entirely: is traditional media, especially linear TV, which can still command a sizable proportion of campaign spend, still worth the investment? Our analysis points to a resounding yes. Corresponding with current media use, we found that traditional media acts as a powerful amplifier in a modern media mix. Campaigns that integrated channels like TV, Out-of-Home (OOH), or Point-of-Sale (POS) alongside their digital efforts received a substantial reward: on average, they boosted their net campaign potential reach by a significant 17%.

Corresponding with current media use, we found that traditional media acts as a powerful amplifier in a modern media mix.

Prime time push: linear TV turns reach into brand impact

As we have shown, digital media is the heart in today’s campaigns. In line with that, all campaigns in our analysis include digital and particularly social media, because it comes with all the advantages of targeting, creative formats, ease of performance measurement, and cost efficiency. But we have also seen that linear TV – at least on total population level – has a higher reach than social. So, the key question is: **What value is linear TV bringing to the table, given its high investment?**

We discovered that campaigns featuring TV in the media mix consistently outperformed those that did not. On average, they delivered a 7% higher score on potential reach, confirming TV’s enduring power to cast a wide net. These same campaigns also achieved an 11% higher score for memorable attention (see Figure 8).

This powerful one-two punch of broader reach and higher memorable attention leads directly to the ultimate goal: the crucial, long-term work of building a brand and making it top-of-mind (ToM) for consumers. While TV is still highly effective at reaching broad audiences and cutting through the clutter, its true superpower is its ability to build brand stature. Our analysis revealed a stunning finding in this regard: on average, campaigns that included TV in their media mix achieved a 16% higher lift in ToM unaided brand awareness compared to campaigns that ran without it (see Figure 9). This is a critical distinction. It means that while many channels can get your ad

seen, TV remains unparalleled in its ability to take a brand and make it a household name – the first one that comes to mind. In the quest for long-term brand health, that is a contribution that is impossible to overstate.

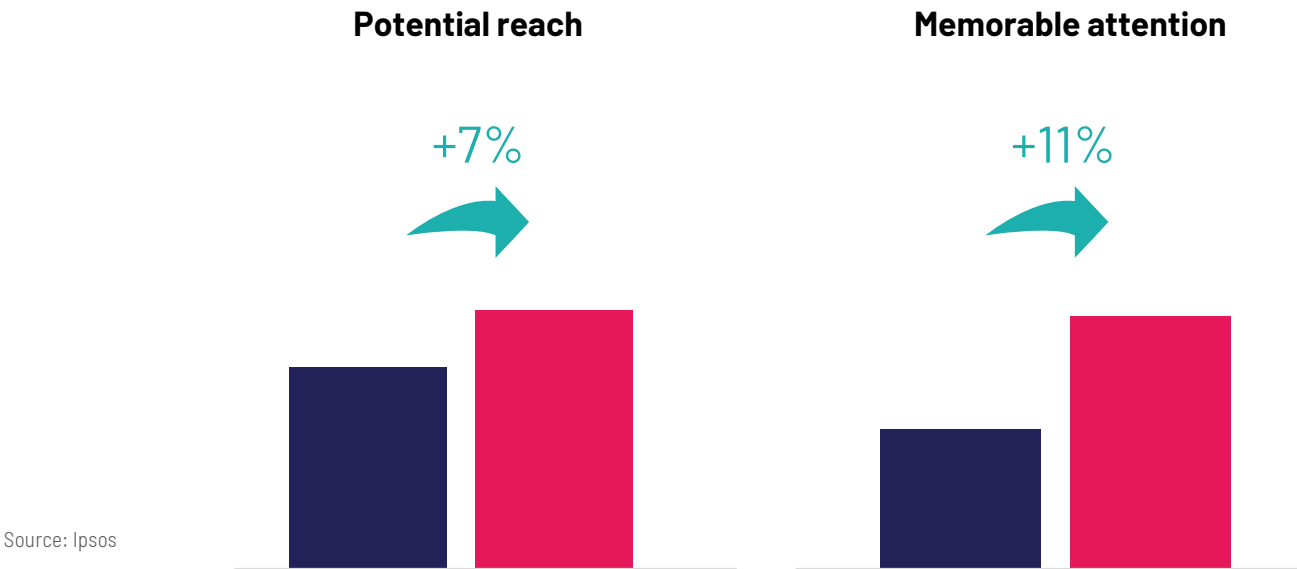
But it doesn’t stop here: TV also helps to push brand KPIs along the lower funnel, our results suggest that campaigns with TV in the mix generate an 8% higher lift than campaigns without TV (see Figure 9). Which means that the higher costs seem to be well invested.



TV remains unparalleled in its ability to take a brand and make it a household name.

Figure 8: Potential reach and memorable attention for campaigns with and without linear TV

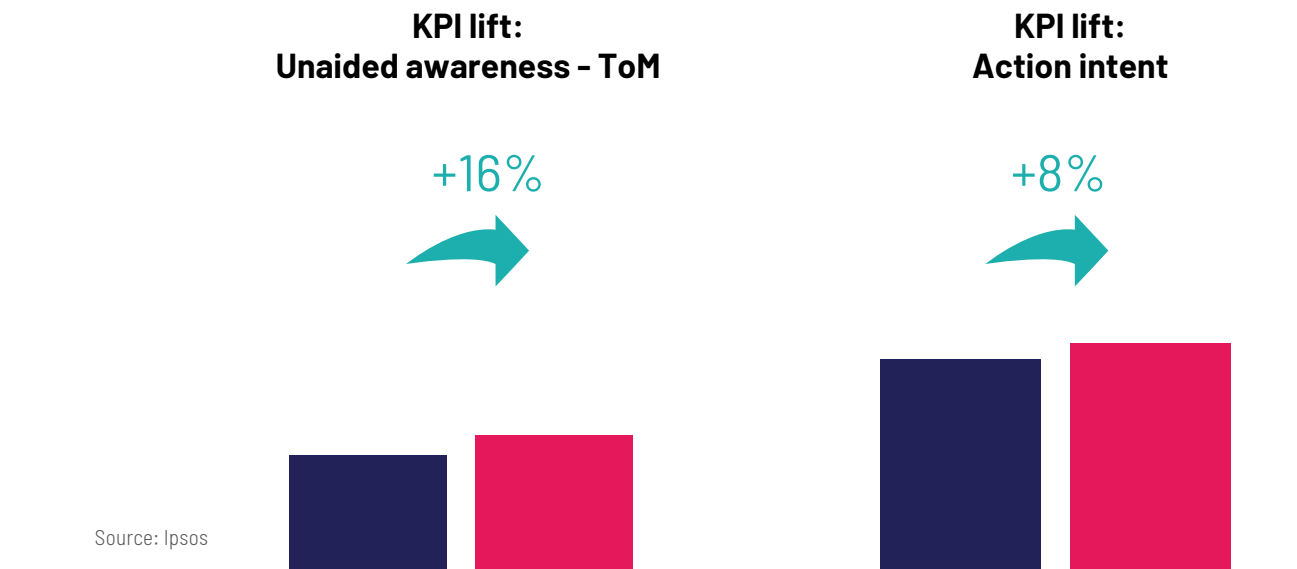
■ Campaigns without linear TV ■ Campaigns with linear TV



Source: Ipsos

Figure 9: KPI lifts across campaigns with and without linear TV

■ Campaigns without linear TV ■ Campaigns with linear TV



Source: Ipsos

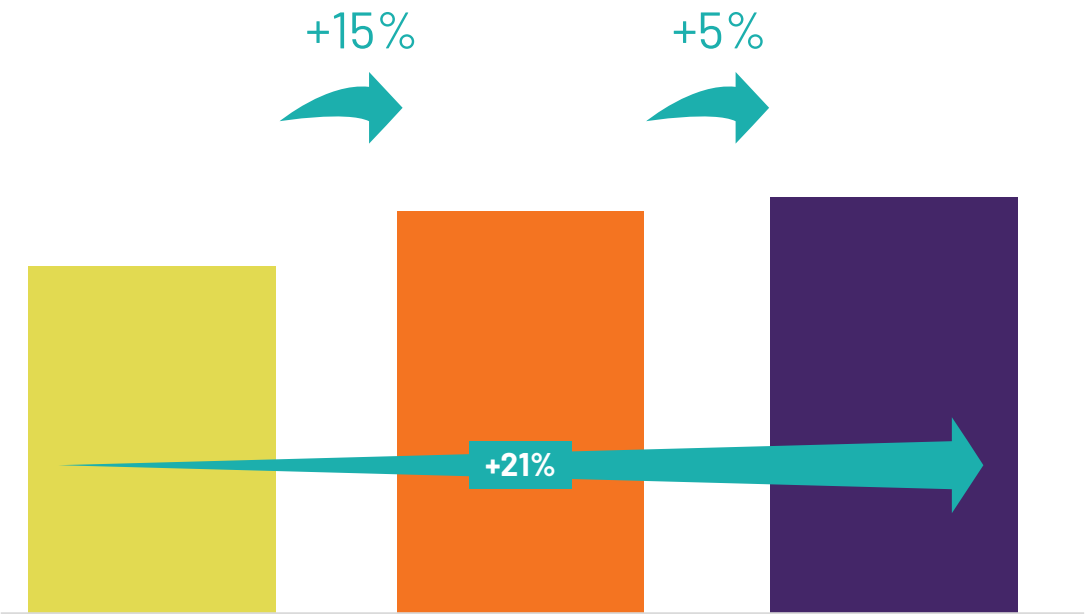
The synergy effect: multi-channel strategies fuel consumer action

We’ve already seen how adding more channels to your media plan is a powerful strategy for boosting potential reach. But the benefits don’t stop there. The real magic happens when we look beyond reach and see how a multi-channel strategy impacts core brand KPIs – especially the all-important goal of getting consumers to act. **Our analysis shows that as people encounter a campaign across different media, the message doesn’t just get seen; it gets deeply encoded in their memories.** This creates a powerful multiplier effect. We found that when a consumer recognised a campaign

on five or more media channels compared to just one, their intent to take action surged by an incredible 21%. This is a clear and compelling demonstration that a well-orchestrated, multi-channel approach is one of the most effective tools for converting brand awareness into tangible results. And this brings us right back to our core framework. This synergy isn’t accidental. It’s the result of a perfectly aligned strategy in which media choices match audience preferences, allowing tailored creatives to successfully deliver the right message at the right time, time and again.

Figure 10: Action intent lift across number of media with campaign attention

■ 1 media ■ 3 media ■ 5+ media



Source: Ipsos

Key takeaways

In a world where global ad spend has surpassed a staggering \$1 trillion, the century-old question, “Which half of my advertising is wasted?”, is more complex than ever. Today’s attention economy is a fragmented maze of platforms and screens, where consumer focus is the

ultimate prize. Our analysis of 50 recent cross-media campaigns, spanning 18 categories and 15 countries, cuts through this complexity to offer clear, data-backed insights. Here are our initial key findings and actionable takeaways to guide your media strategy:

01



A well-orchestrated media mix will maximise your campaign reach

While the number of media channels is a key driver of your campaign’s reach, and as such its success, effective planning is a strategic balancing act. First, you must align your media choice with your audience’s specific preferences. Second, you must consider your budget; it’s far more effective to fund a few channels properly to achieve meaningful reach on each one than to spread your investment too thinly across many.

02



Digital is the core, but traditional media is a powerful amplifier

While digital provides the essential foundation for every modern campaign, a digital-only strategy can leave a significant reach advantage on the table. Our analysis shows that campaigns strategically integrating traditional channels like TV, OOH or POS boosted their net campaign reach by an average of 17%, proving the powerful amplification effect of a well-rounded media mix.

03



TV is far from done – it still delivers a one-two punch for brand building

TV remains a media heavyweight, delivering a powerful combination of broad reach and memorable attention. Most importantly, its true superpower is building brands notoriety. Campaigns with TV in the mix achieved a 16% higher lift on unaided brand awareness and an 8% higher lift on action intent than those without.

04



Leverage the synergy effect to drive action

The benefits of a multi-channel strategy extend far beyond simply boosting reach, creating a powerful synergy effect that directly impacts consumer behaviour. Our analysis proves this in action: when consumers recognised a campaign across five or more media channels, their intent to act surged by an incredible 21%.



The benefits of a multi-channel strategy extend far beyond simply boosting reach, creating a powerful synergy effect that directly impacts consumer behaviour.

Endnotes

- 1 Statista Market Insights, 2025. [Advertising – Worldwide.](#)
- 2 Videoweeek, 2024. [Meta Ad Revenues to Overtake All Linear TV in 2025.](#)
- 3 Deloitte, 2025. [Digital Media Trends.](#)
- 4 ARD/ZDF Research Commission, 2024. [Media Study 2024.](#)
- 5 Media Perspektiven, 2024. [Number of Social Media Users Rises to 60 Percent.](#)

Further Reading



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