

think^{tv}

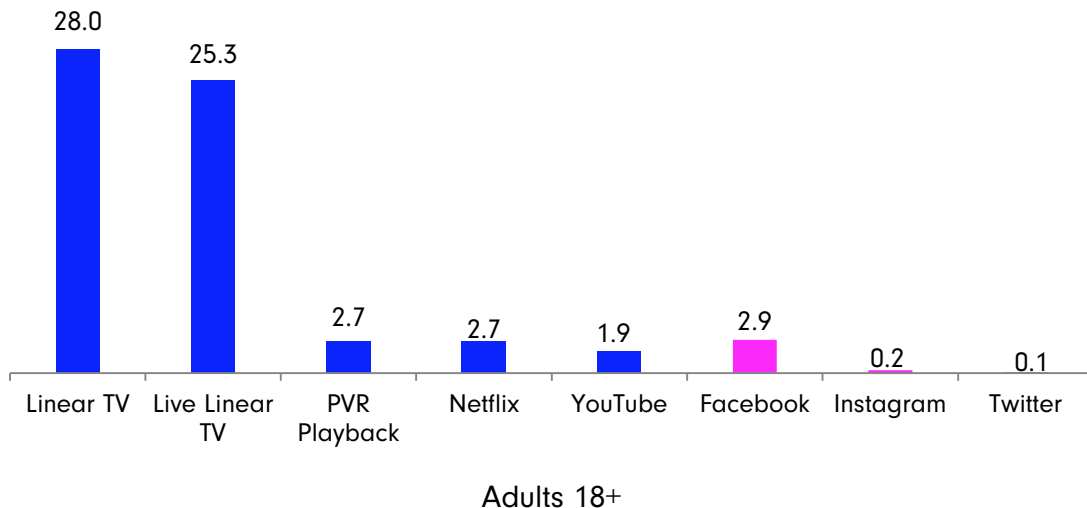
THE QUARTERLY

A quick look at Winter/Spring 2016

TV LEADS SCREEN TIME

Canadians watched **28 hours of TV a week** this Winter/Spring.

AVERAGE WEEKLY HOURS PER CAPITA



Time spent with TV is

- **15x more** than YouTube
- **10x more** than Facebook

Sources:

- Linear TV, Live Linear TV, PVR Playback: Numeris, PPM, Total Canada, All Locations, Full Week (Mo-Su 2a-2a), 1 minute Reach; Weeks 19-39(Jan 4 – May 29, 2016).
- Digital: comScore Media Metrix Multi-Platform, 18+, 4 month average (Jan – April 2016), [M][1] YouTube.com, [C][0] Facebook.com, [M][0] Instagram.com, [M][0] Twitter.com
- Note: Numeris population estimates used to calculate average weekly hours per capita for digital media.
- Netflix: Media Technology Monitor, Fall 2015, Netflix mean weekly hours among A18+ population.

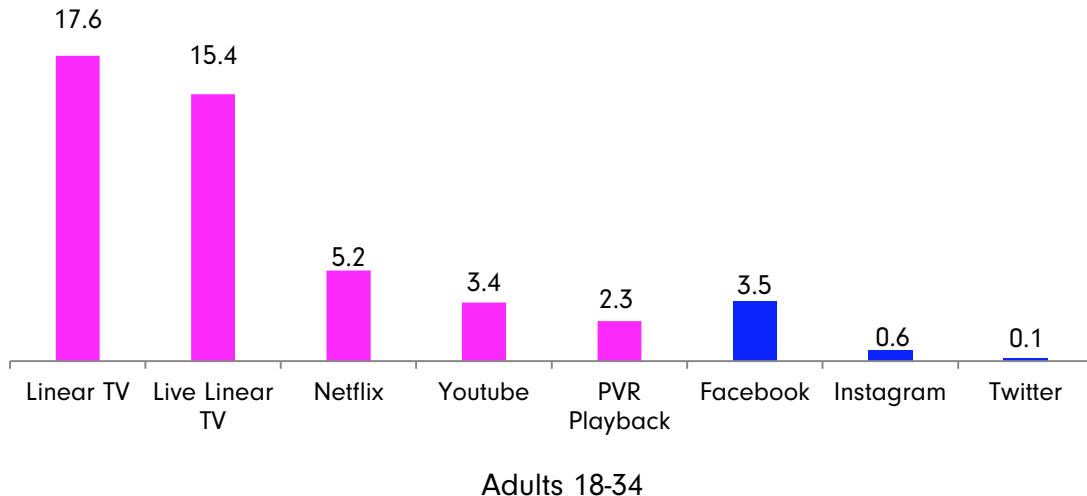
TV LEADS SCREEN TIME FOR MILLENNIALS

Millennials watched almost **18 hours of TV a week** this Winter/Spring (over 2.5 hours a day).

AVERAGE WEEKLY HOURS PER CAPITA

Time spent with TV is

- **5x more** than **YouTube**
- **5x more** than **Facebook**



Sources:

- Linear TV, Live Linear TV, PVR Playback: Numeris, PPM, Total Canada, All Locations, Full Week (Mo-Su 2a-2a), 1 minute Reach; Weeks 19-39(Jan 4 – May 29, 2016).
- Digital: comScore Media Metrix Multi-Platform, 18+, 4 month average (Jan – April 2016), [M][1] YouTube.com, [C][0] Facebook.com, [M][0] Instagram.com, [M][0] Twitter.com
- Note: Numeris population estimates used to calculate average weekly hours per capita for digital media.
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TV IS #1 MEDIUM FOR REACH & TIME SPENT

REACH

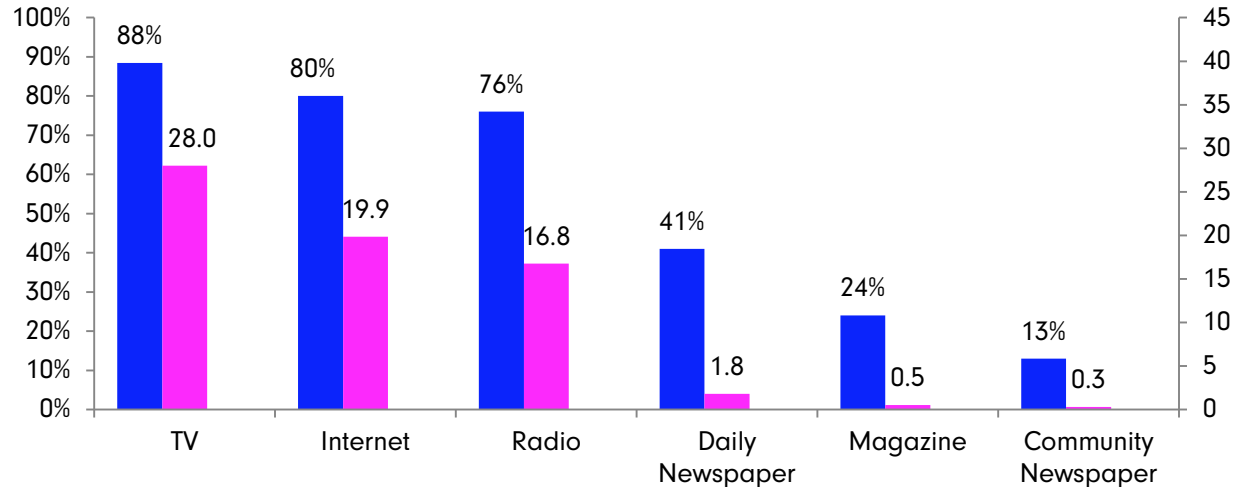
Television reaches 88% of the Canadian adult population on a daily basis.

TIME SPENT WATCHING TV

Exceeds all other media:

- 41% more than the Internet
- 67% more than Radio

■ DAILY REACH % ■ AVERAGE WEEKLY HOURS PER CAPITA



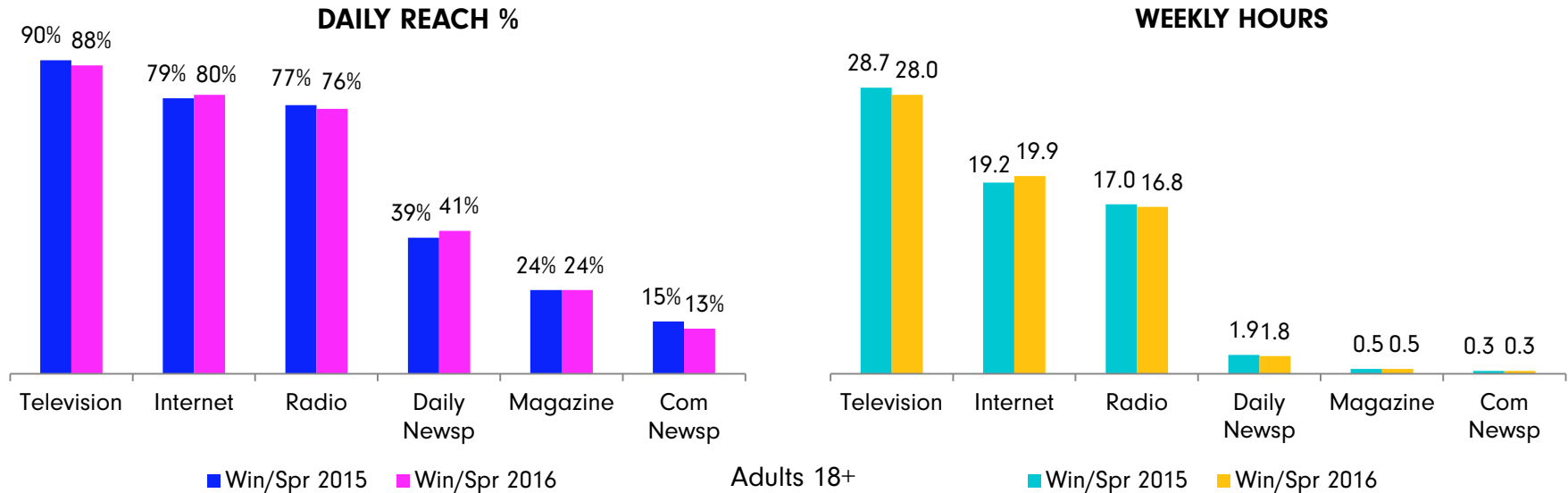
Adults 18+

Sources:

- Television: Numeris, PPM, Total Canada, Consolidated, All Locations, Full Week (Mo-Su 2a-2a), Weeks 19-39 (Jan 4 – May 29, 2016)
- Internet Daily Reach, Radio, Daily Newspaper, Magazine, Community Newspaper: Numeris RTS Canada Spring 2016
- Internet Weekly Hours: comScore Media Metrix; Multi-Platform; Jan – April 2016. *

* Note: Numeris population estimates used to calculate average weekly hours per capita.

TV REACH AND TIME SPENT ARE REMARKABLY CONSISTENT



Sources:
 • Television: Numeris, PPM, Total Canada, Consolidated, All Locations, Full Week (Mo-Su 2a-2a), Weeks 19-39 (Jan 4 – May 29, 2016)
 • Internet Daily Reach, Radio, Daily Newspaper, Magazine, Community Newspaper: Numeris RTS Canada Spring 2015 & 2016
 • Internet Weekly Hours: comScore Media Metrix; Multi-Platform; Jan – April for 2015 & 2016. *
 * Note: Numeris population estimates used to calculate average weekly hours per capita.

TV CONTINUES TO REACH JUST ABOUT EVERYBODY – EVERY WEEK

WINTER-SPRING 2016 (WEEKS 19-39)							
Q2 STATS >>	AVERAGE WEEKLY REACH (%)						
	Ind.2+	Male	Female	A18+	A18-34	A25-54	C2-11
Q2 2015-16	97.0	96.8	97.2	97.5	95.5	96.6	94.6
Q2 2014-15	97.8	97.8	97.7	98.1	96.5	97.6	96.3
Q2 2013-14	98.1	98.1	98.2	98.3	96.7	98.0	97.5
Q2 2012-13	98.2	98.3	98.2	98.4	96.9	98.2	97.5
Q2 2011-12	98.3	98.3	98.3	98.5	97.8	98.1	97.4



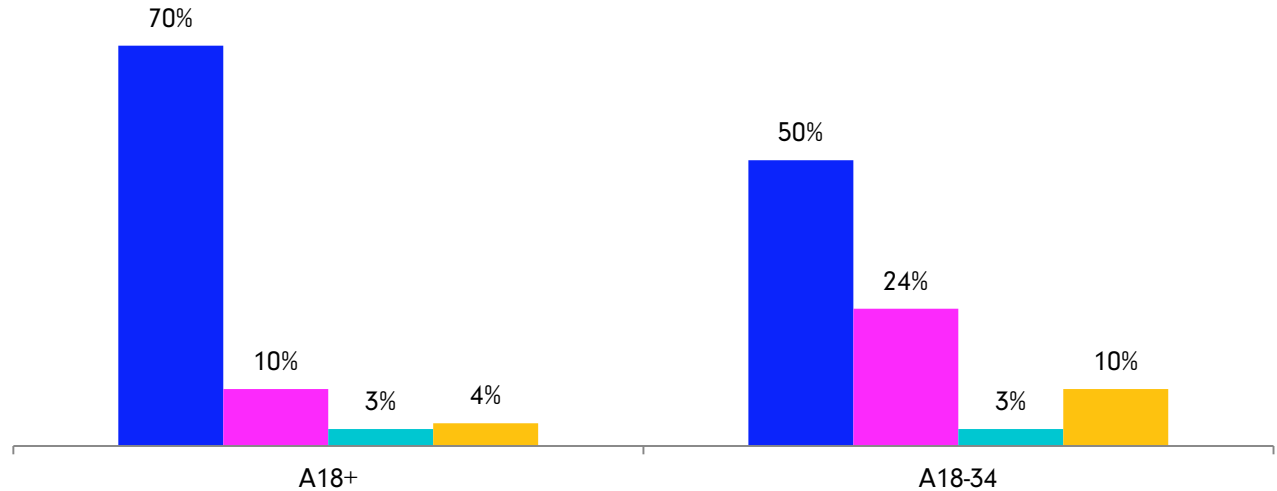
Source:

- Numeris, PPM, Total Canada, Total TV, Mo-Su 2a-2a, 1 minute reach, All Locations, Consolidated, Q2 = Weeks 19-39 for each broadcast year.

MAJORITY OF CANADIANS PAY MOST ATTENTION TO ADS WHEN WATCHING ON TV

■ TV ■ Desktop/Laptop ■ Tablet ■ Cell Phone

Q. When do you pay most attention to advertising within television programming?
When watching on your...?

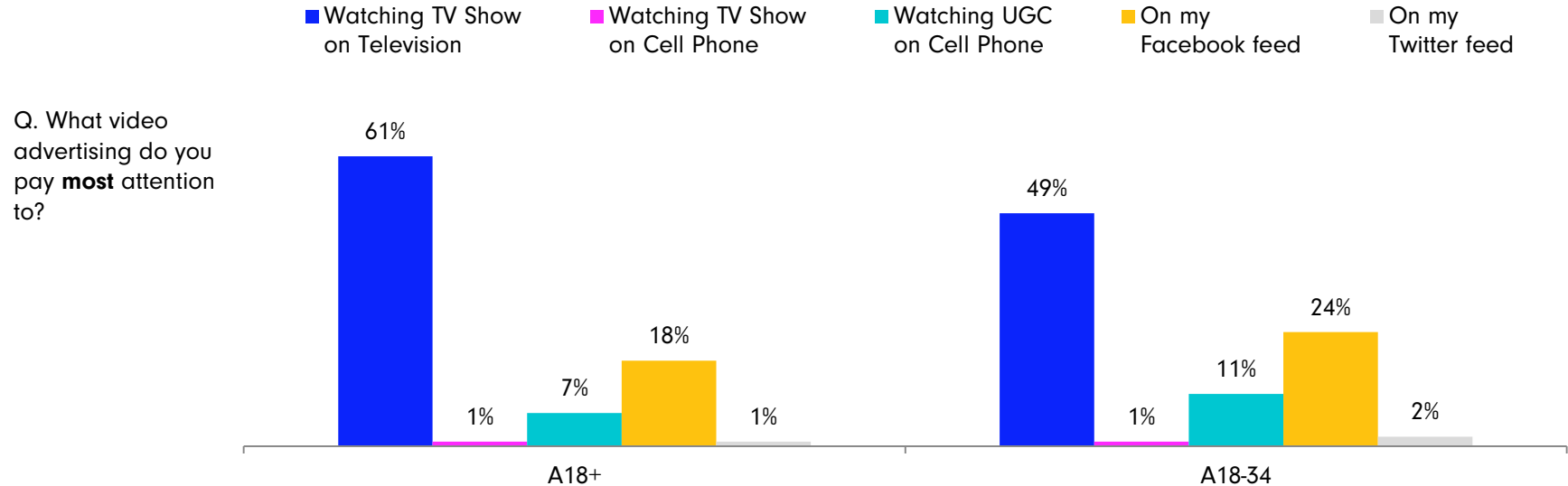


Source:
• nlogic, thinktv - OmniVu Survey March 2016

TV ADS GET MOST ATTENTION

Canadians pay most attention to video ads when viewed in TV content on a TV set.

- **3x** more than Facebook (**2x** more than Facebook for Millennials)
- **9x** more than UGC on a cell phone (**4.5x** more for Millennials)

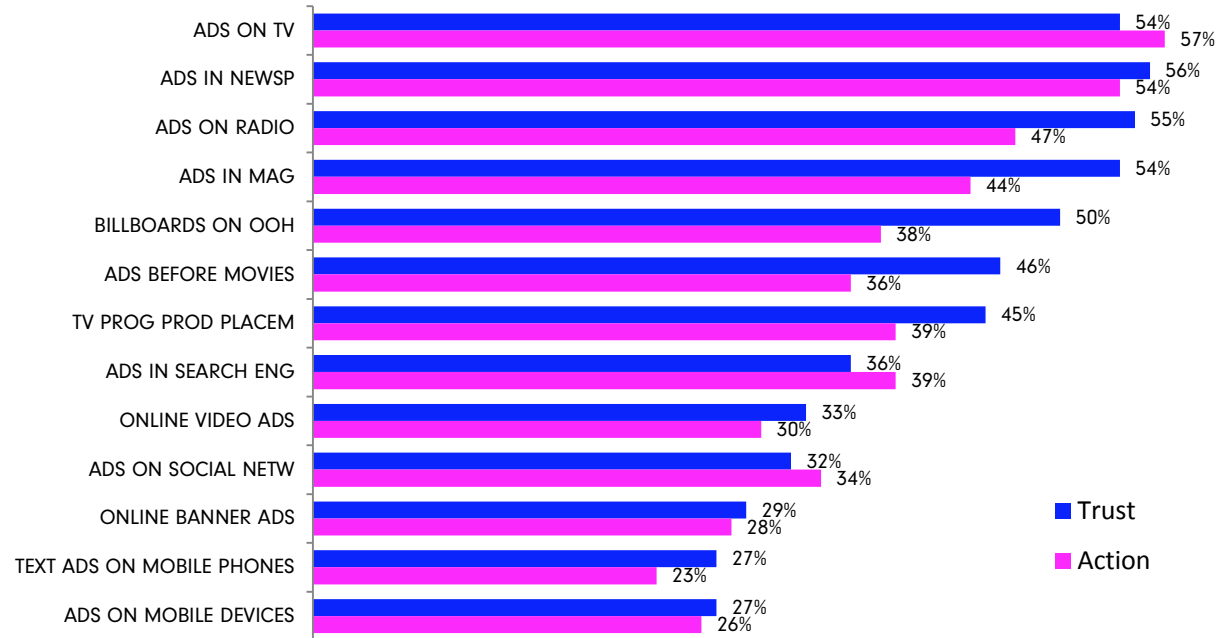


Source:
• nlogic, thinktv - OmniVu Survey March 2016

TV ADS DRIVE CONSUMER ACTION

Not only are TV ads highly trusted, TV Ads drive consumer action more than any other medium.

- **46% more** than Search Engines
- **68% more** than Social Networks
- **90% more** than Online Video



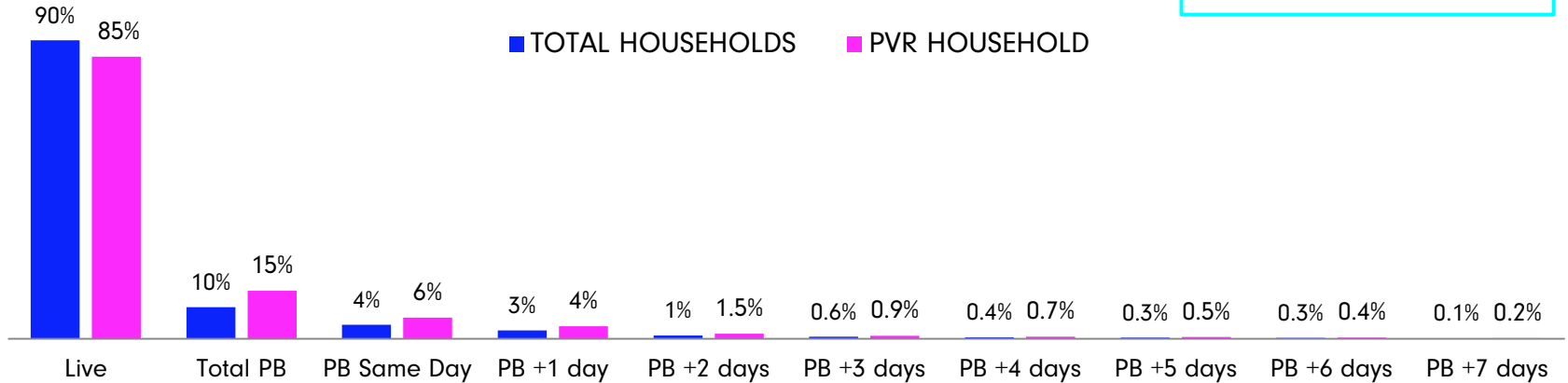
*To What Extent Do You Trust The Following Forms of Advertising? – Trust Completely + Trust Somewhat.
To What Extent Do You Take Action on The Following Forms of Advertising? – Always Take Action + Sometimes Take Action.*

Source:
• Nielsen, ACA - Leading Canadian Marketers Survey Nov. 2015/Jan. 2016

PVR USAGE

- Even in PVR households, the majority of TV viewing occurred live.
- The bulk of PVR content viewed within 24 hours.

PVR penetration is 52% of all Canadian HH's*

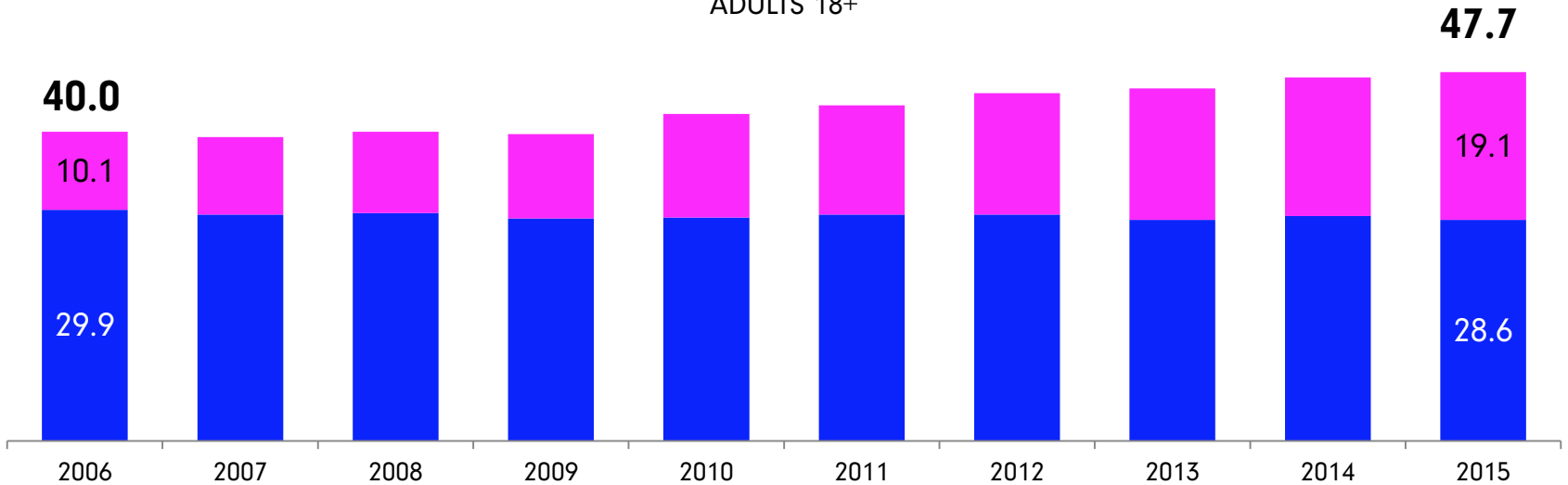


PVR households: Live + 1 day = 95% of total viewing

Source:
 • Numeris, PPM, Total Canada; Total TV; M-Su 2a-2a; All locations, Winter-Spring 2015-16 (Weeks 19-39 - Jan 4 to May 29, 2016); PB = Playback
 * Numeris Establishment Survey – March 2016.

INTERNET TIME IS LARGELY ADDITIVE

AVERAGE WEEKLY HOURS PER CAPITA
ADULTS 18+

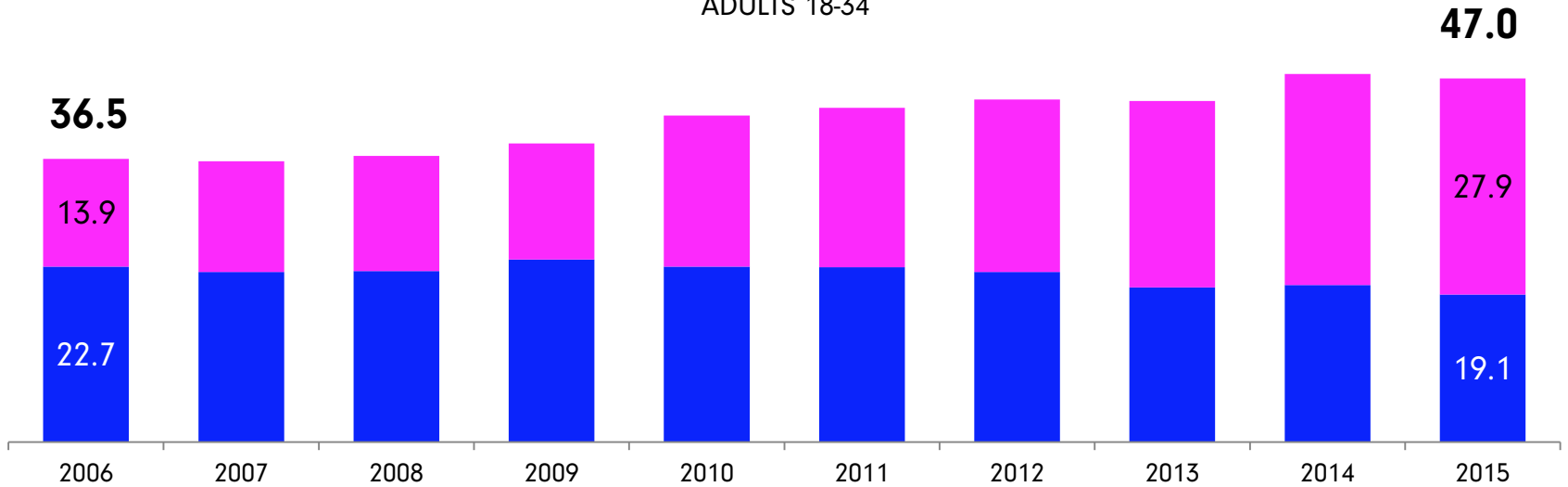


Sources:

- Numeris , PPM, Total Canada, Total TV, Consolidated, All Locations, Mo-Su 2a-2a, Fall - Weeks 2-16 or each broadcast year,
- MTM Fall 2006-2015, National

INTERNET TIME IS LARGELY ADDITIVE FOR MILLENNIALS

AVERAGE WEEKLY HOURS PER CAPITA
ADULTS 18-34



Sources:

- Numeris , PPM, Total Canada, Total TV, Consolidated, All Locations, Mo-Su 2a-2a, Fall - Weeks 2-16 or each broadcast year,
- MTM Fall 2006-2015, National

■ Television ■ Internet

NEW SHOWS ARE RATINGS WINNERS

Three of the Top 10 Shows in Winter/Spring are new entrants

A25-54	
TOP 10 REGULARLY SCHEDULE PROGRAMS*	
Program	Network
Big Bang Theory	CTV
The X-Files	CTV
Survivor: Brawn v Brain v Beauty	Global
Criminal Minds	CTV
Marvel Agents of Shield	CTV
Lucifer	CTV
NFL Playoffs	CTV
The Flash	CTV
Criminal Minds: Beyond Borders	CTV
NFL Playoffs	CTV

A18-34	
TOP 10 REGULARLY SCHEDULE PROGRAMS*	
Program	Network
Big Bang Theory	CTV
The X-Files	CTV
Survivor: Brawn v Brain v Beauty	Global
Quantico	CTV
Criminal Minds	CTV
The Flash	CTV
Marvel Agents of Shield	CTV
NBA Raptors Playoffs Round 3	TSN
Lucifer	CTV
Grey's Anatomy	CTV



New for 2016

Source:

- Numeris, PPM, Total Canada; All Locations; Consolidated; Winter-Spring 2016 Weeks 19-39 (Jan 4 – May 29, 2016).
- * Programs airing 3 or more times during Winter-Spring 2016.

VIEWER DIFFERENCES: MILLENNIALS VS A35-54

Millennial's TV choices are as similar as they are **different**.



A18-34	
TOP 10 REGULARLY SCHEDULED PROGRAMS*	
Program	Network
Big Bang Theory	CTV
The X-Files	CTV
Survivor: Brawn v Brain v Beauty	Global
Quantico	CTV
Criminal Minds	CTV
The Flash	CTV
Marvel Agents of Shield	CTV
NBA Raptors Playoffs Round 3	TSN
Lucifer	CTV
Grey's Anatomy	CTV

A35-54	
TOP 10 REGULARLY SCHEDULED PROGRAMS*	
Program	Network
Big Bang Theory	CTV
The X-Files	CTV
Survivor: Brawn v Brain v Beauty	GLOBAL
Marvel Agents of Shield	CTV
Criminal Minds	CTV
Lucifer	CTV
Criminal Minds: Beyond Borders	CTV
NFL Playoffs	CTV
NFL Playoffs	CTV
Code Black	CTV

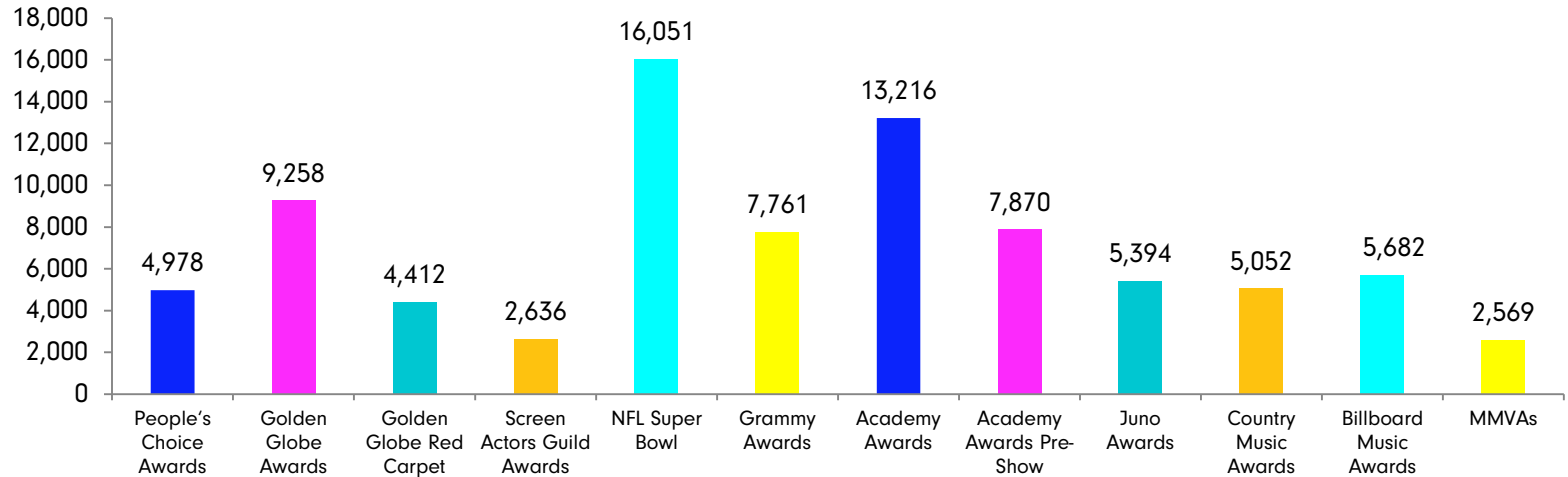
Source:

• Numeris, PPM, Total Canada, All Locations, Consolidated, Winter-Spring 2016 Weeks 19-39 (Jan 4 – May 29, 2016).

* Programs airing 3 or more times during Winter-Spring 2016.

AND THE AWARD GOES TO... EVENTS SEASON 2016

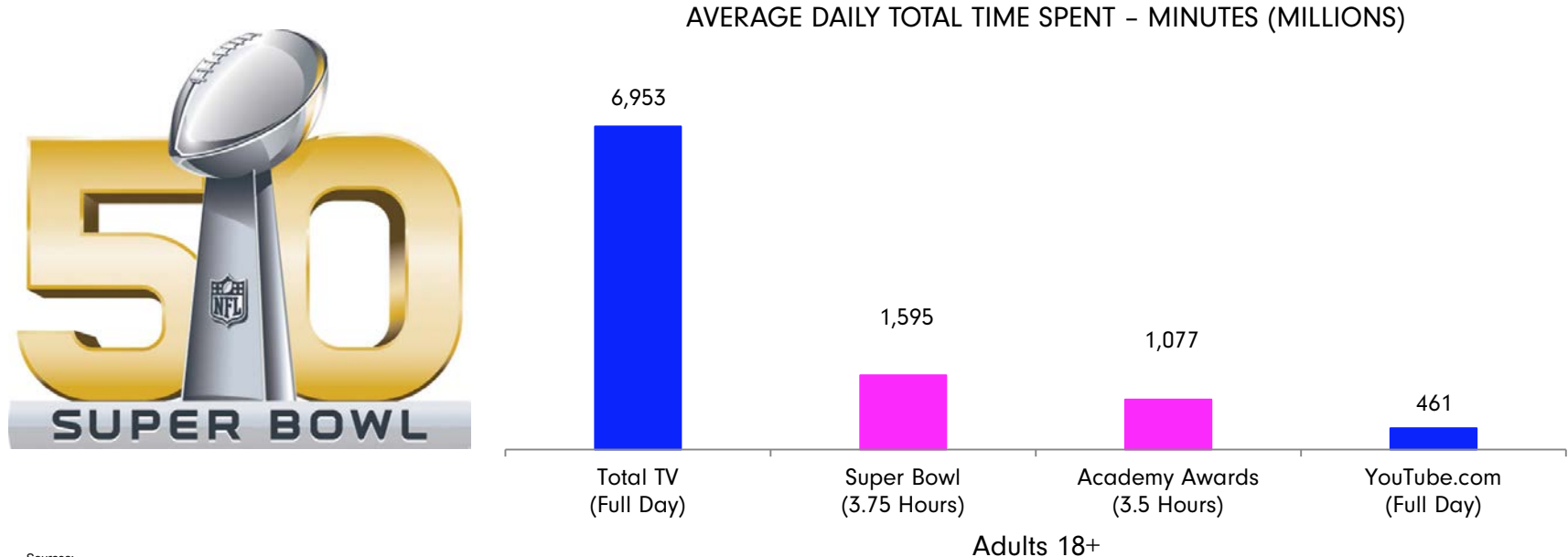
TOTAL REACH (000), IND. 2+



Source:
 • Numeris, PPM, Total Canada; All Locations; Consolidated; Winter-Spring 2016 Weeks 19-39 (Jan 4 – May 29, 2016).

LIVE TV SCORES

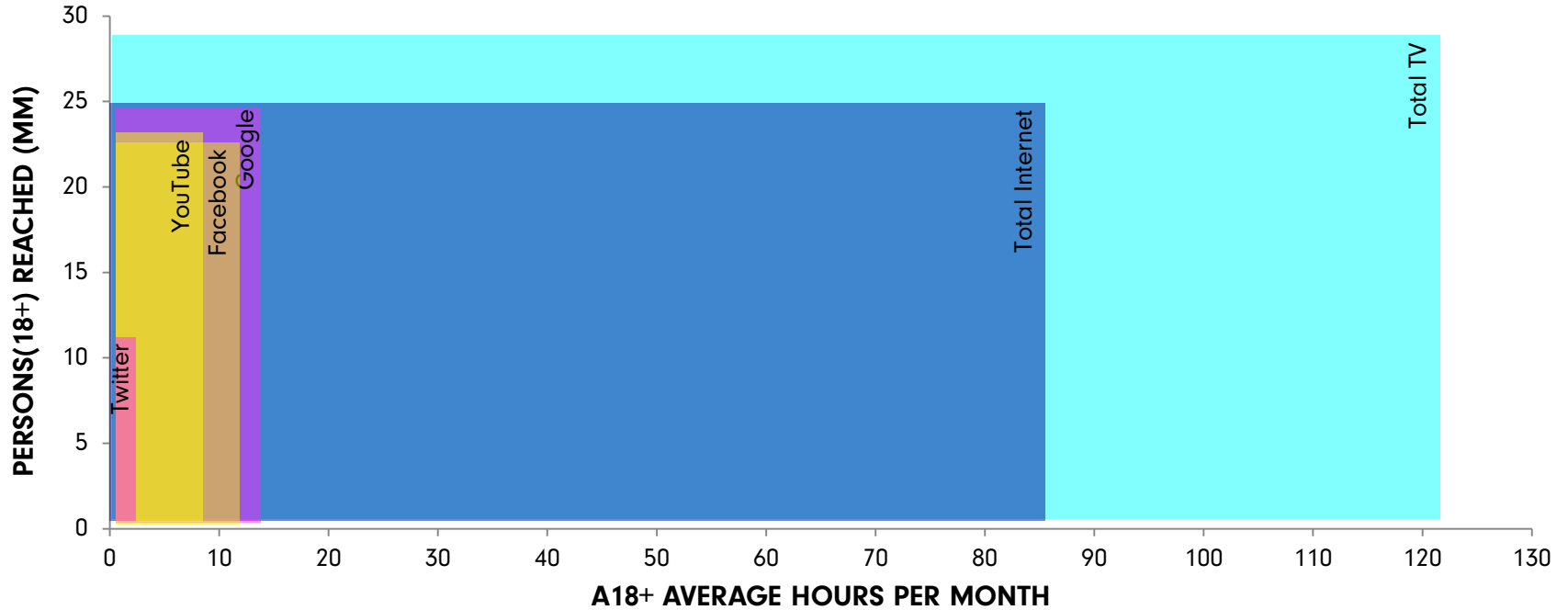
Time spent with the Super Bowl far exceeded any given full day on YouTube.



Sources:

- Numeris, PPM, Total Canada, Super Bowl (CTV + RDS), Academy Awards (CTV), Consolidated, All Locations
- comScore Media Metrix, Multi- Platform, [M][1] YouTube.com, Jan - April 2016, Total Minutes/121 days.

TV DELIVERS UNRIVALLED SCALE



Sources:

- Total TV: Numeris, PPM, Total Canada, Consolidated, All Locations, Full Week (Mo-Su 2a-2a), 1 minute Reach; Weeks 19-39 (Jan 4 – May 29, 2016).
- Digital: comScore Media Metrix Multi-Platform, A18+, 3 month average (Jan – March 2016), [M][1] YouTube.com, [C][0] Facebook.com, [M][0] Instagram.com, [M][0] Twitter.com, Google Sites

Note: Numeris population estimates used to calculate average weekly hours per capita for digital media.



**FOR MORE INFORMATION,
PLEASE VISIT [THINKTV.CA](http://thinktv.ca)**