

A series of concentric circles in a light gray color, centered on the left side of the slide, creating a ripple effect that draws the eye towards the text.

the power of **tv** in an **attention economy**

setting the scene



the average **tv** campaign delivers

think^{tv}

323 million impressions



driven by lots of Canadians watching lots of **tv**

119
million
hours

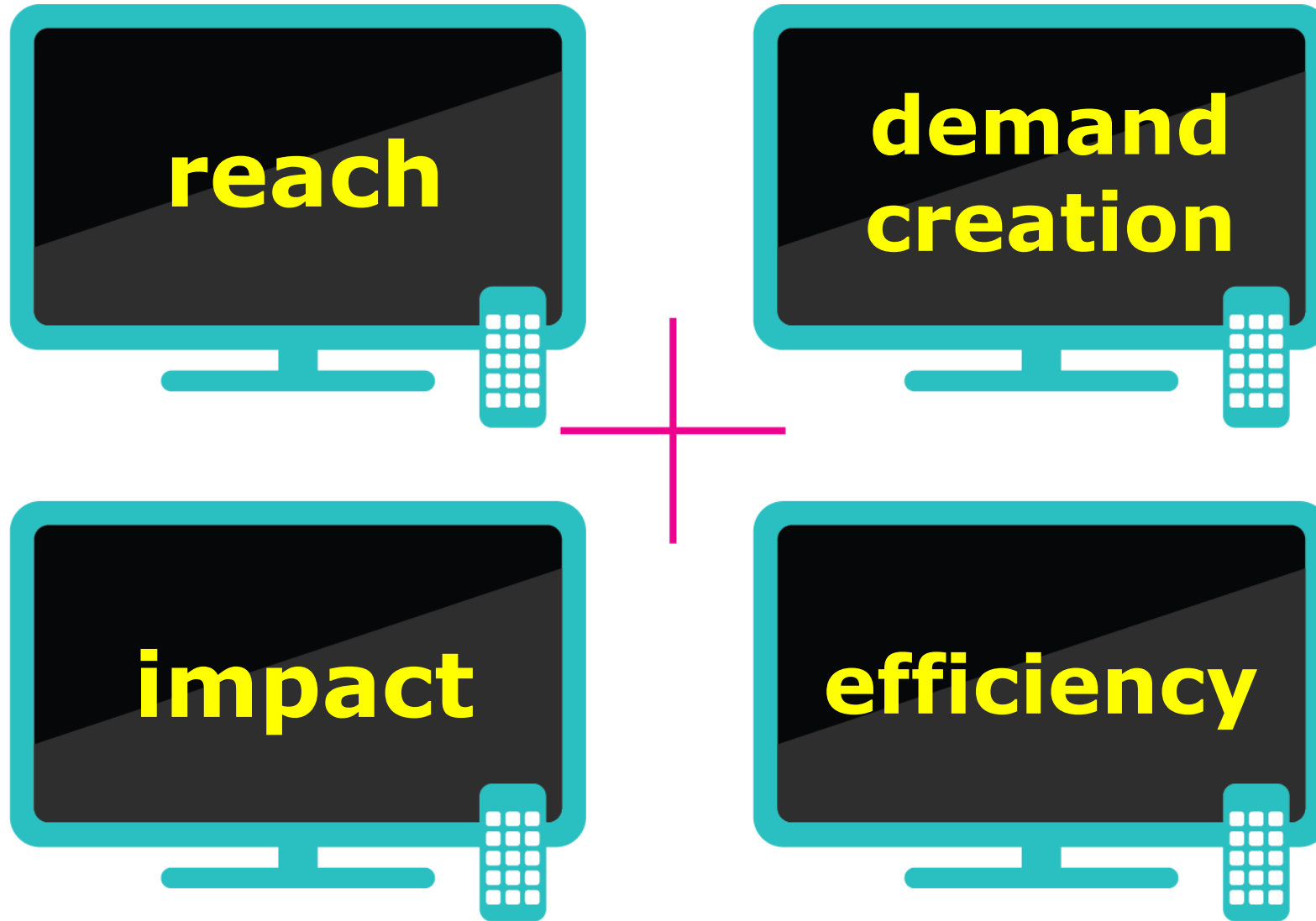
time spent
with tv yesterday

93%
of
Canadians

tv's weekly
reach

tv delivers:

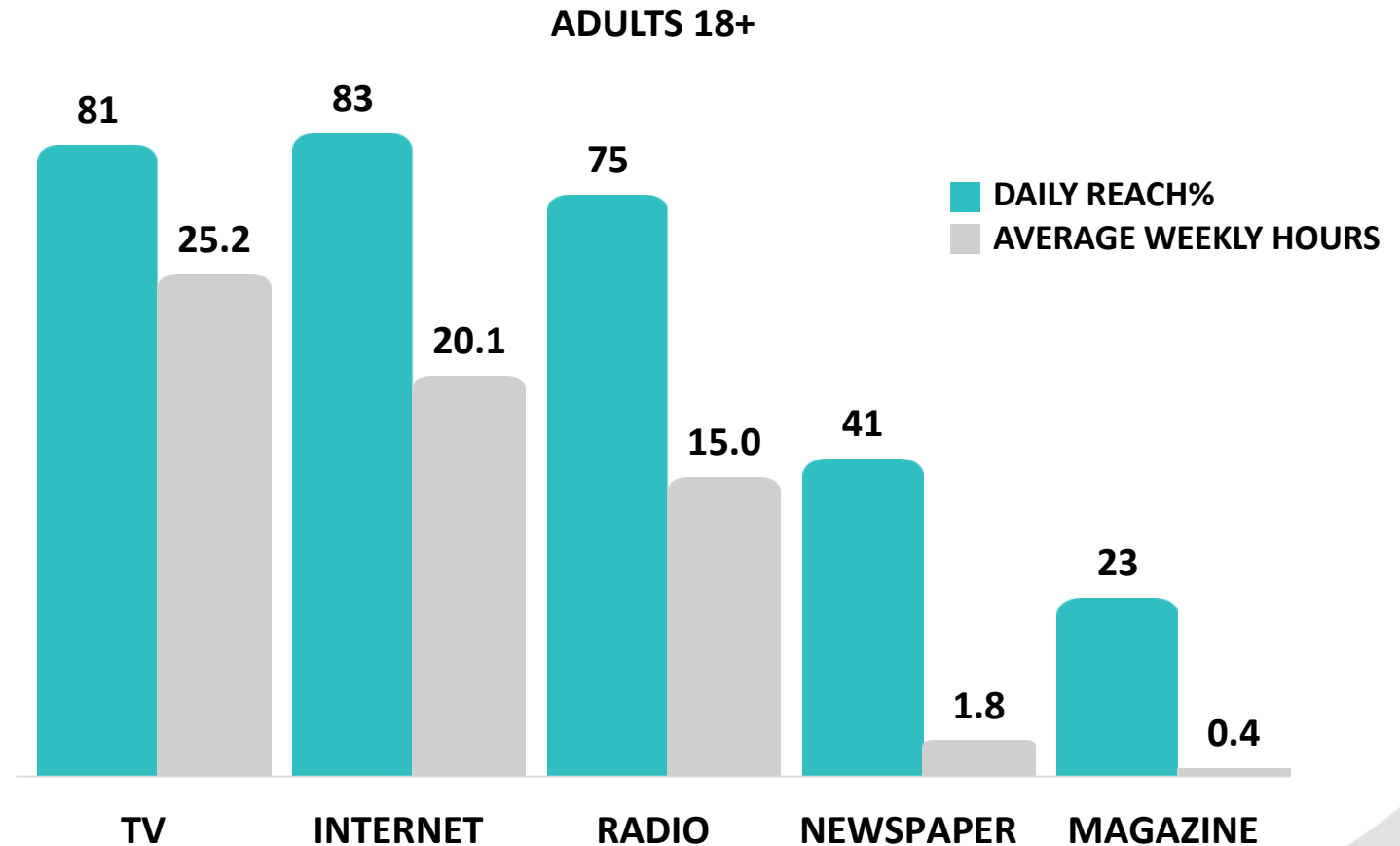
think^{tv}



reach

33 million Canadians every week

tv reaches **81%** of Canadians **daily**
and **94% weekly**



tv reaches **93%** of Canadians **every week**

94%

of adults (18+)

88%

of millennials (18-34)

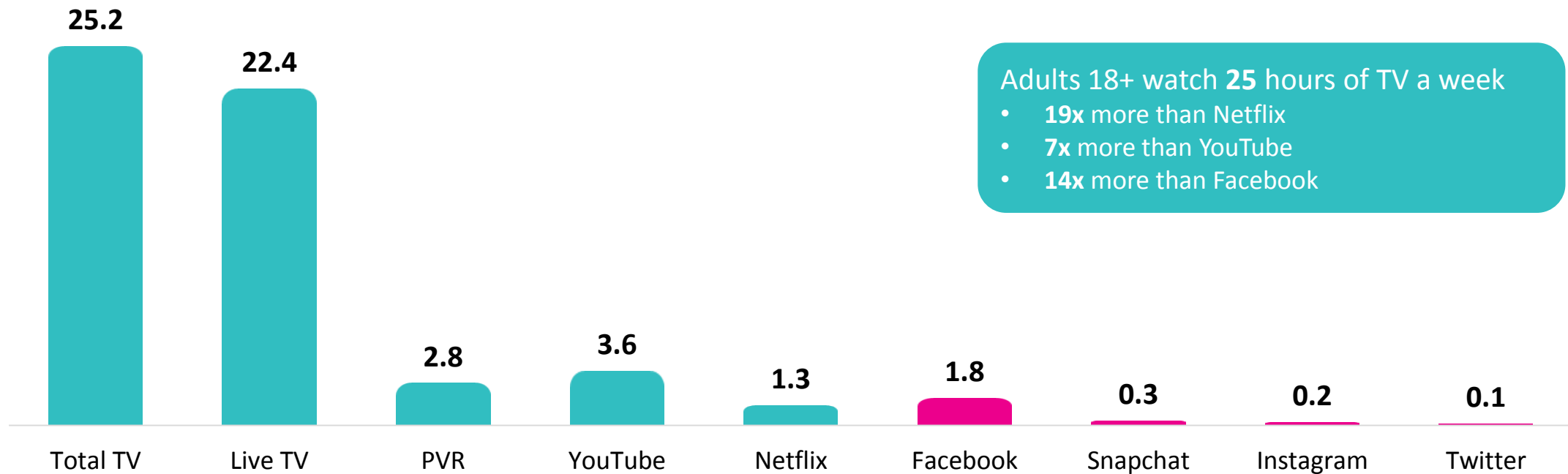
89%

of kids (2-11)



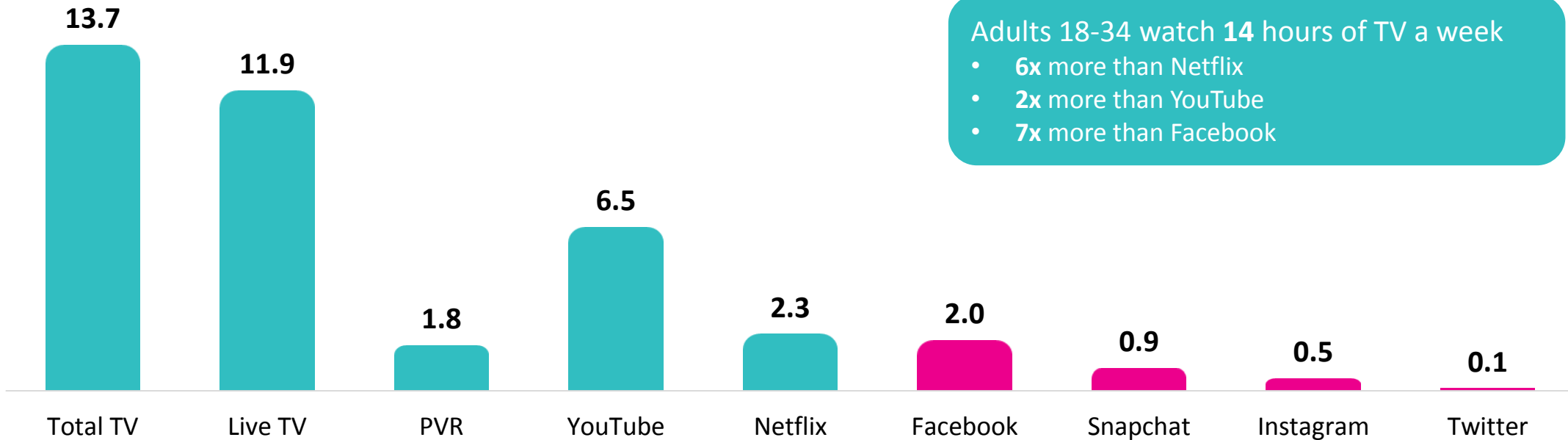
tv dominates time spent

ADULTS 18+
AVERAGE WEEKLY HOURS



think **millennials** aren't watching **tv**? **think again.**

ADULTS 18-34 AVERAGE WEEKLY HOURS





millennials watch more than
490 million hours
of tv **each month**

1 single spot in
Big Bang Theory will reach
582,100 A18-34



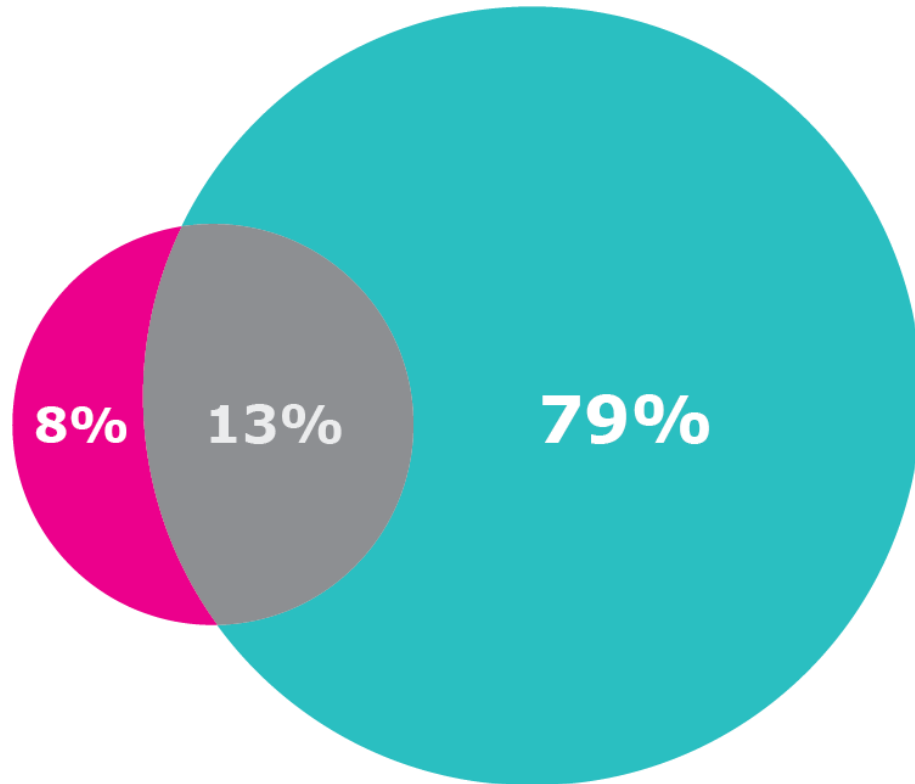
“Marketing activities only build mental availability in the audience they reach.

This makes planning for reach the foundation of any sound media strategy.”

Byron Sharp

Professor of Marketing Science, University of South Australia

the majority of **reach** is achieved through **tv**



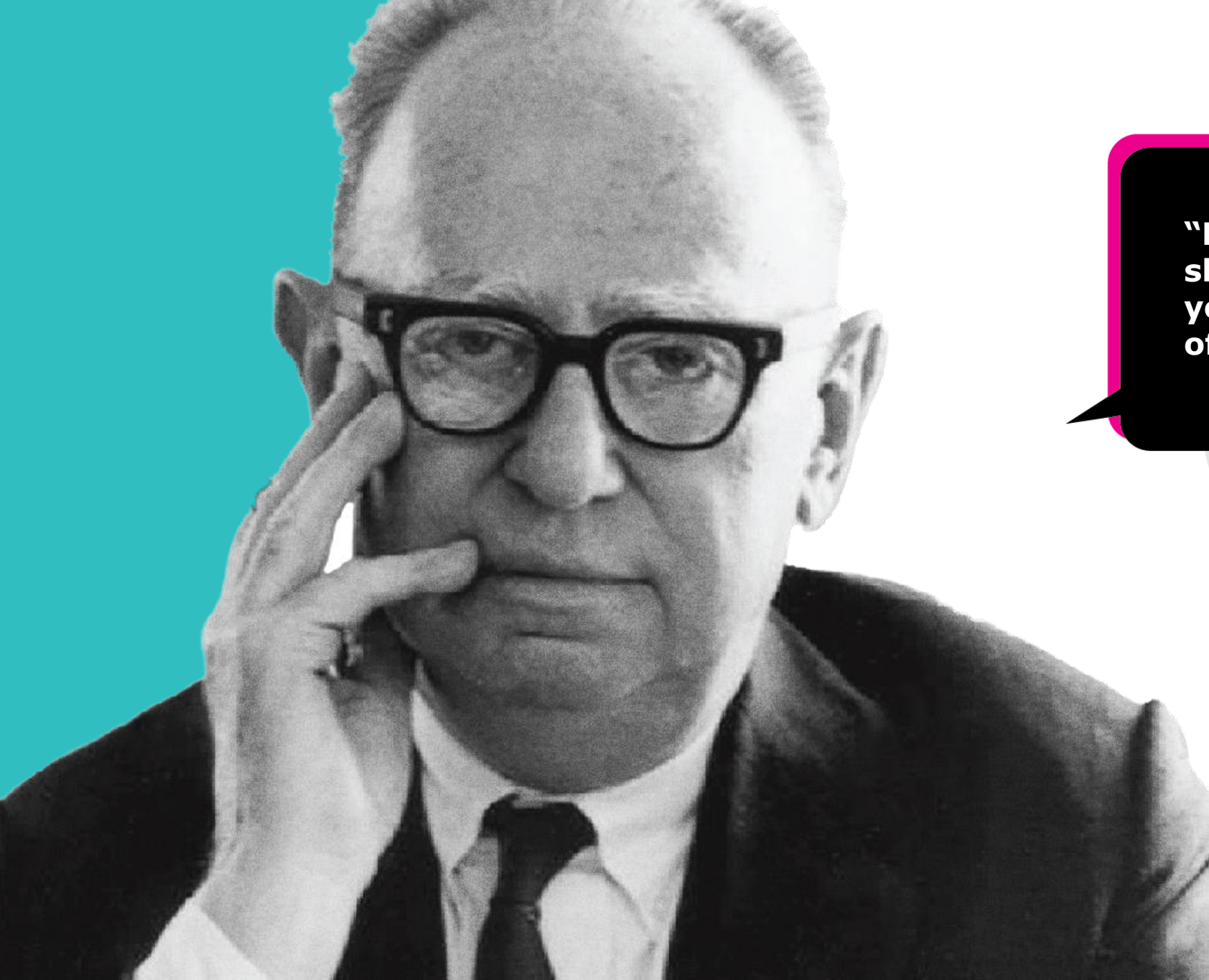
average target campaign reach: 67%
cross-platform reach across 315 campaigns

-  TV ONLY
-  TV + DIGITAL
-  DIGITAL ONLY



impact

tv ads are most influential

A black and white portrait of Leo Burnett, an older man with glasses, resting his chin on his hand in a thoughtful pose. The image is set against a teal background on the left and a white background on the right.

**"Before you can have a
share of the market,
you must have a share
of the mind."**

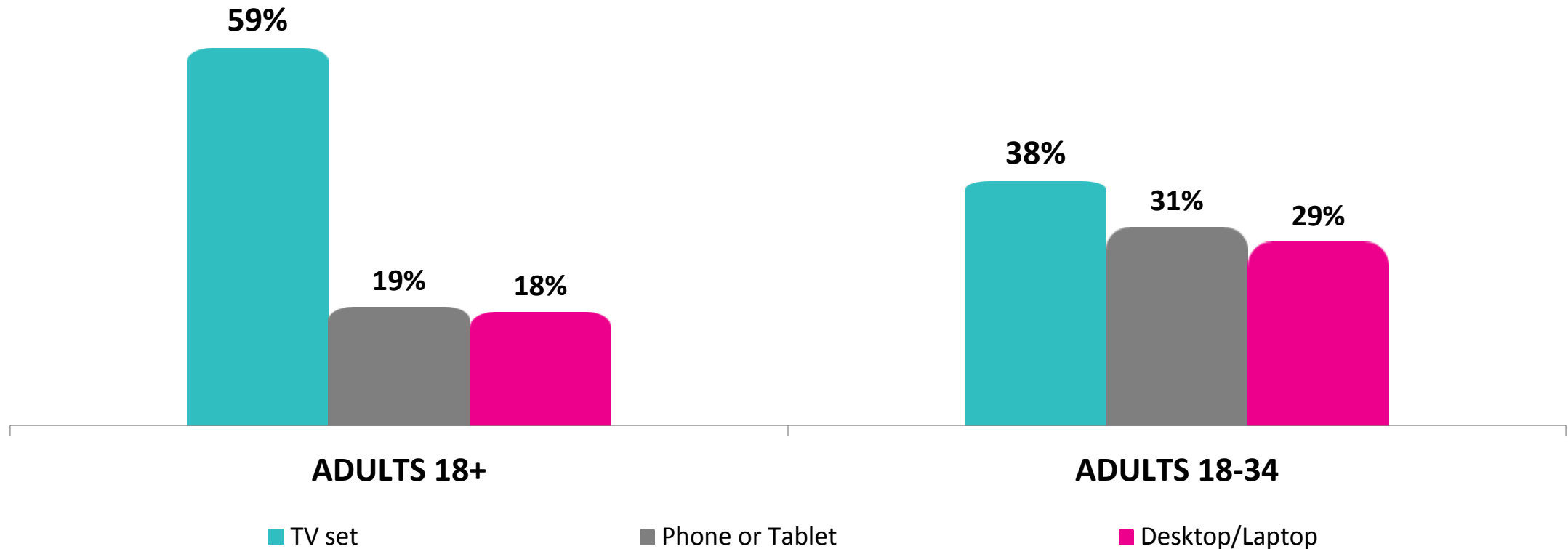
Leo Burnett

consumers pay most attention to **tv**

think^{tv}

and are **least likely** to watch mobile ads

Q: Which one of the following types of video advertising are you **most likely to watch**?

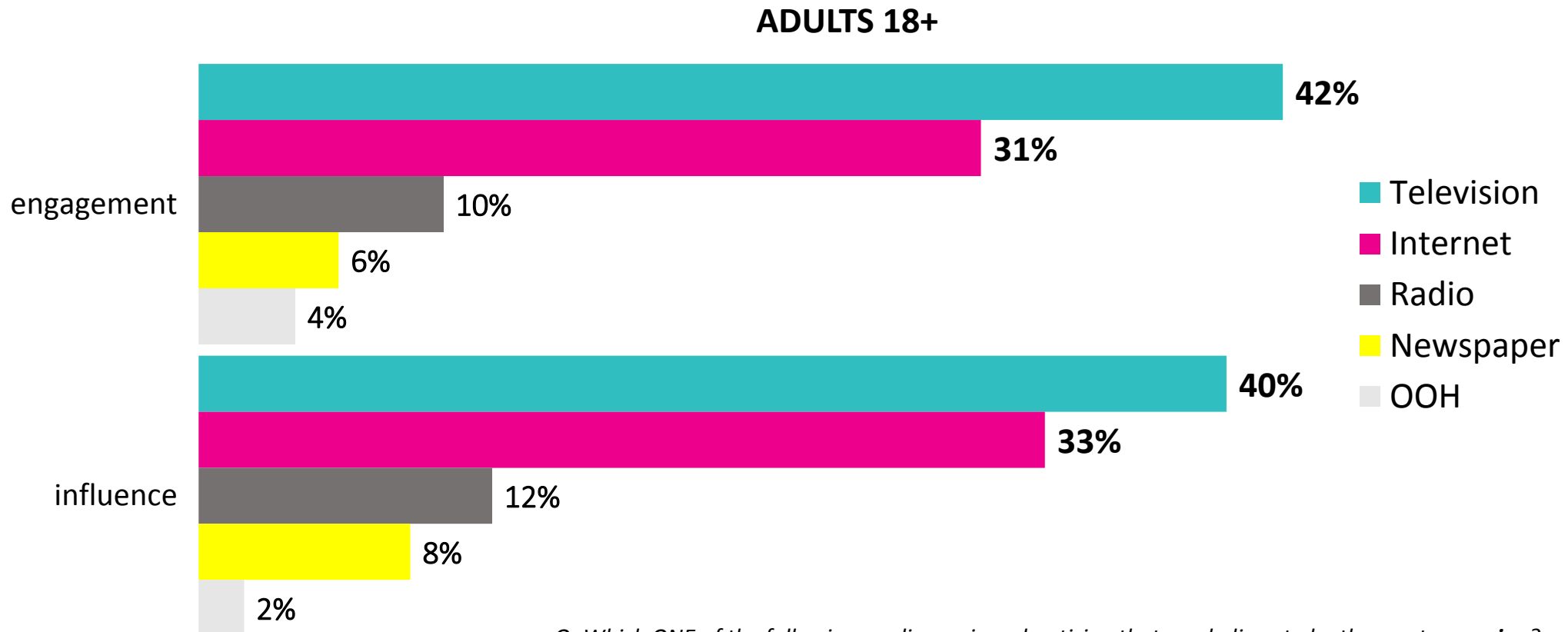




ads are the most **engaging** and **influential**



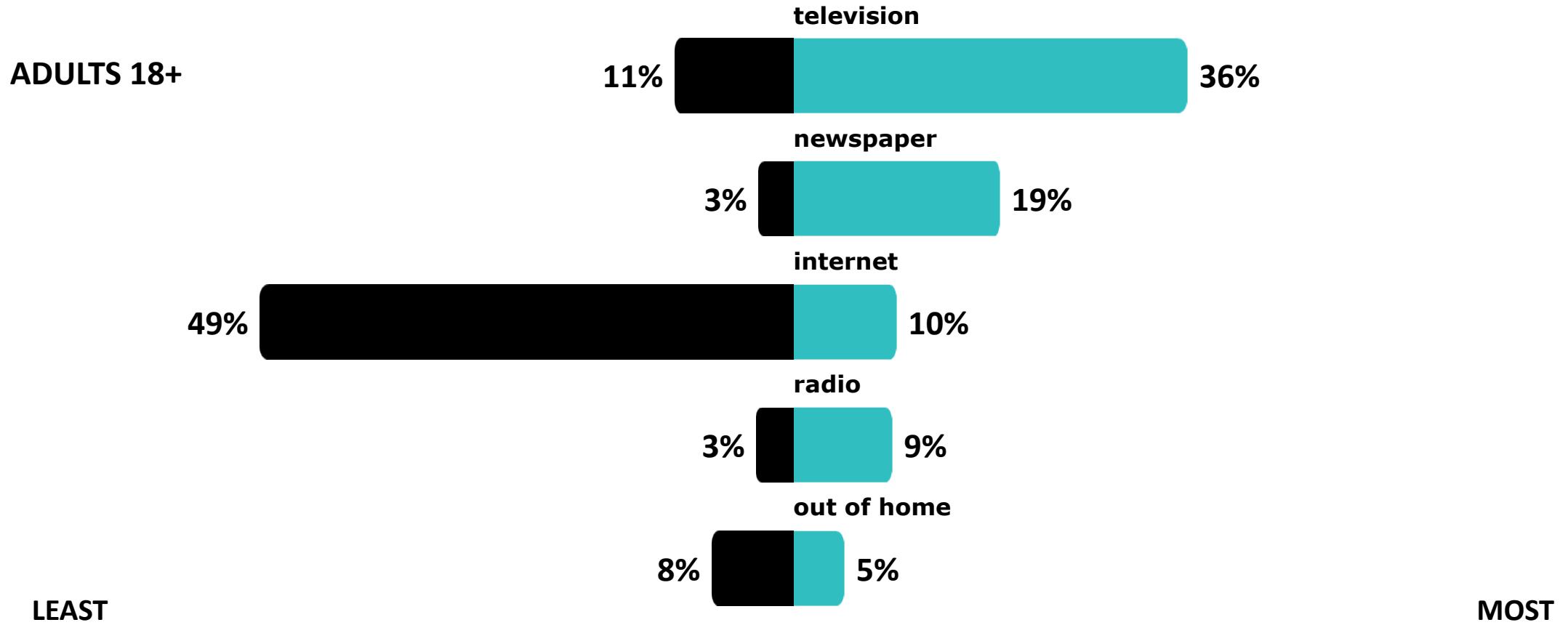
Canadians find TV ads to be more engaging and influential than ads in any other medium



Q: Which ONE of the following media carries advertising that you believe to be the most **engaging**? most **influential**?

tv carries **most trusted** advertising

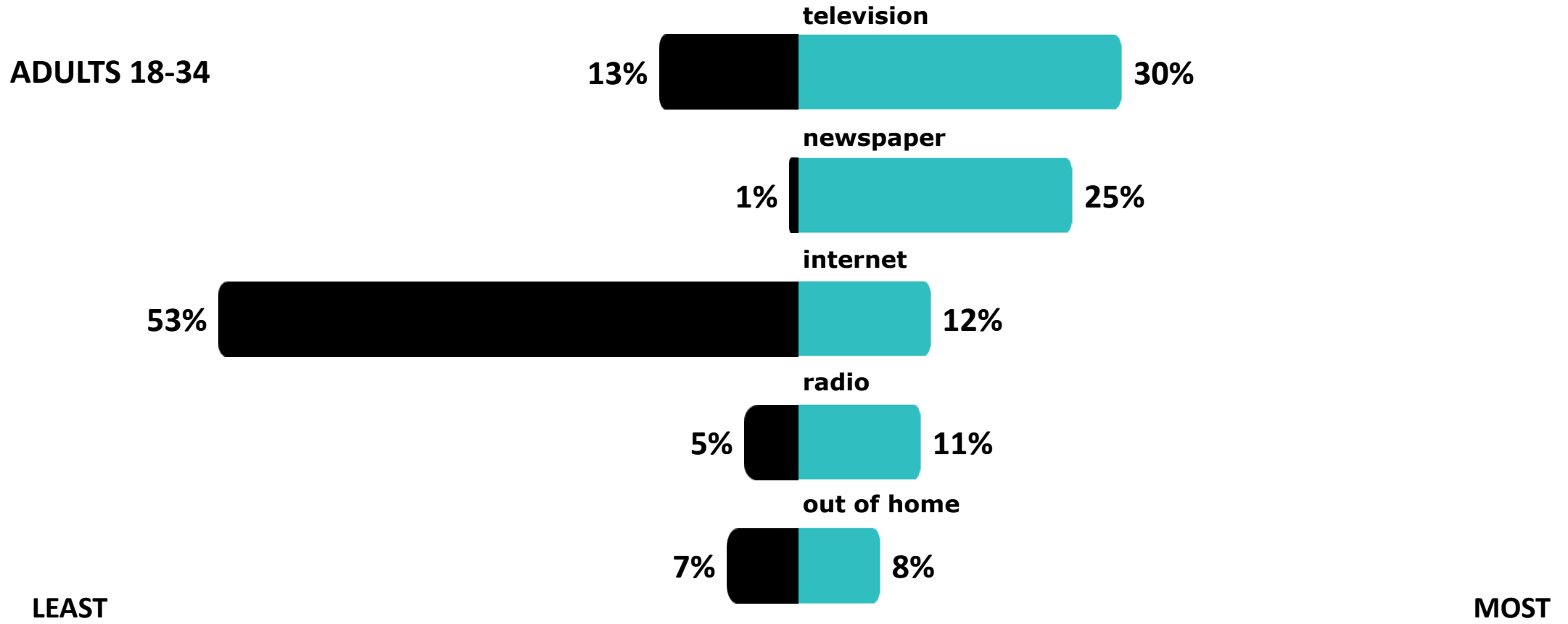
Q: Which one of the following media carries advertising that you believe to be the **most trustworthy**? The **least trustworthy**?



tv advertising is **most trusted** by **digital natives**

internet advertising least trusted

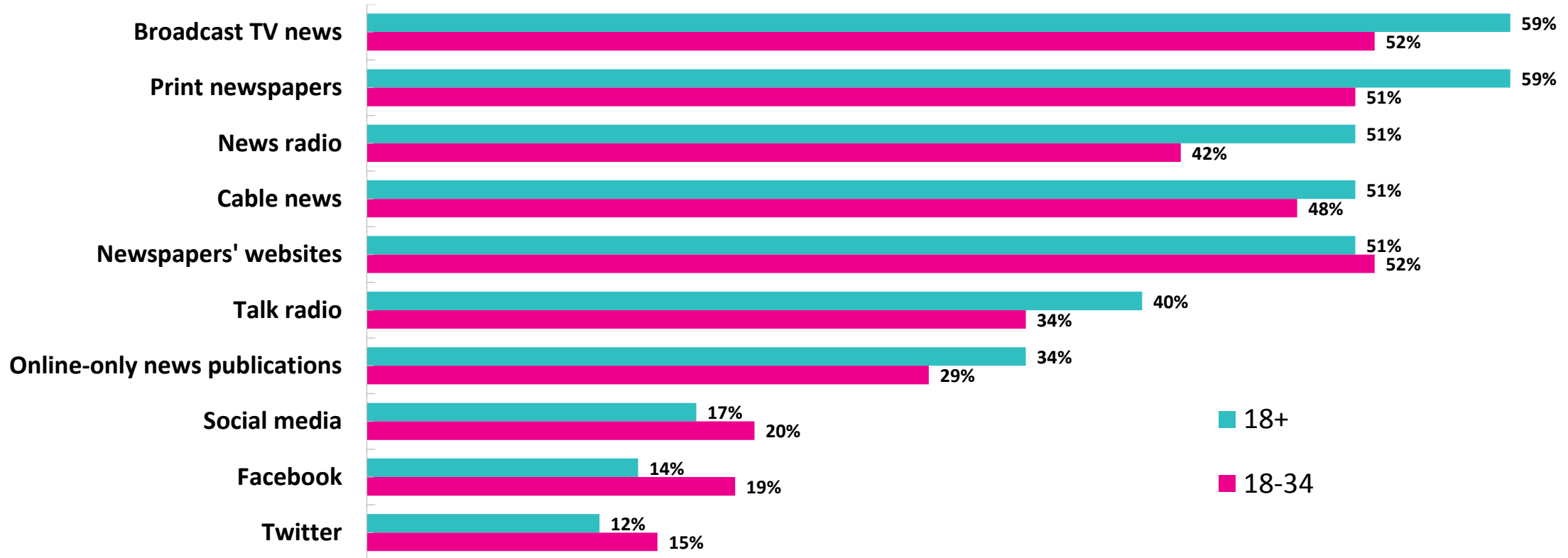
Q: Which one of the following media carries advertising that you believe to be the **most trustworthy**? The **least trustworthy**?





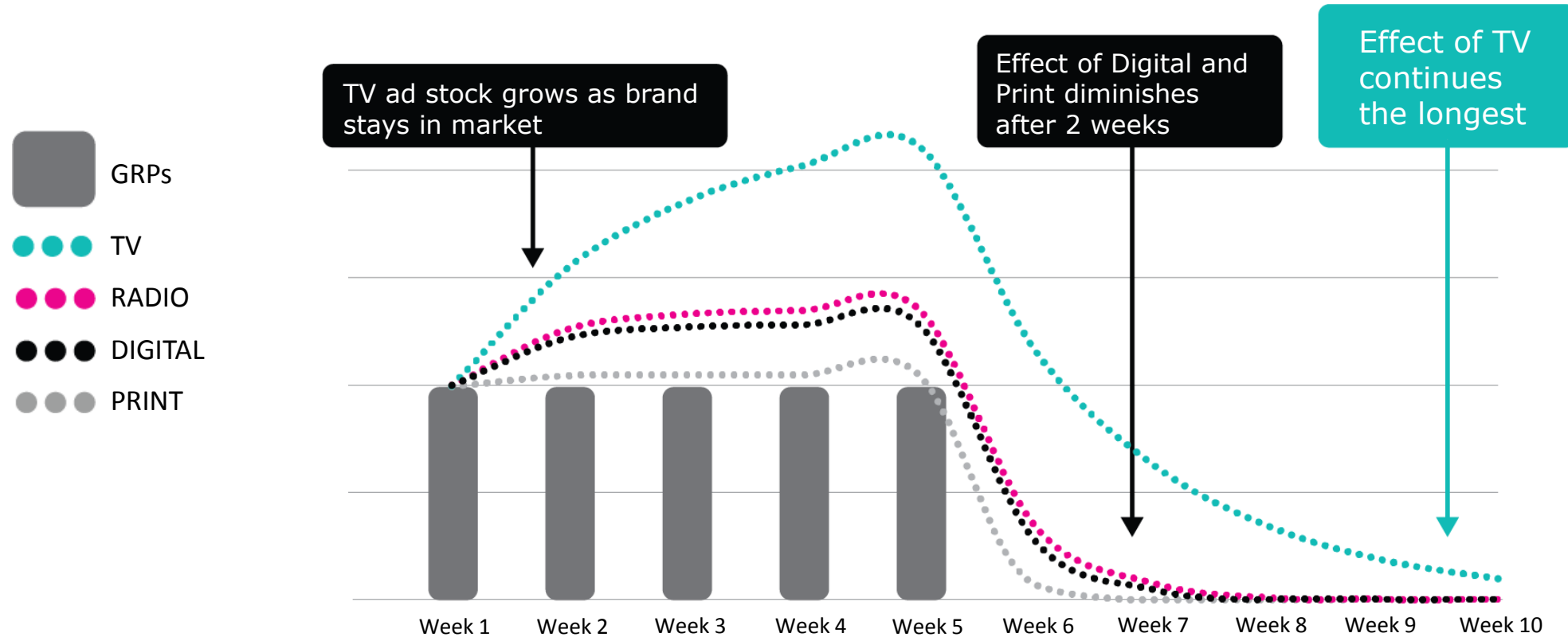
news content is the most trusted

In an era of eroding trust in news institutions, Canadians overwhelmingly trust 'traditional' news sources over digital ones, with even Millennials being 2.5x more likely to trust Broadcast TV news than what they see on social media.



Q. Do you trust the news you read or hear : Top 2 boxes – All the time | Most of the time

the **ad stock** of a **tv** spot **grows the fastest** and lasts the longest

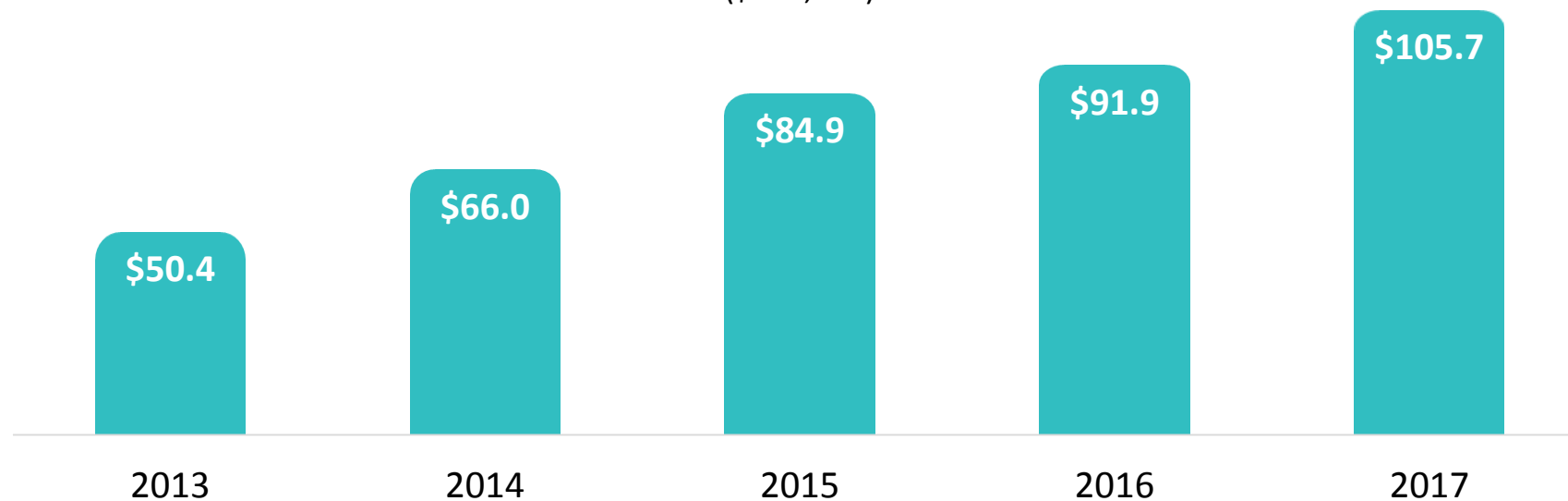


digital companies increase spend on

TV spend by internet-related companies has doubled in the last 4 years

INTERNET RELATED BUSINESSES

TV Spending
(\$000,000)



 **Ad Dynamics**[®]
A Market Track Company

Companies include:



demand creation

tv ads drive consumer action

“When we run a heavy TV schedule, we see a lift in sales and product awareness. We need to run two weeks of digital to get the reach of one day of broadcast”

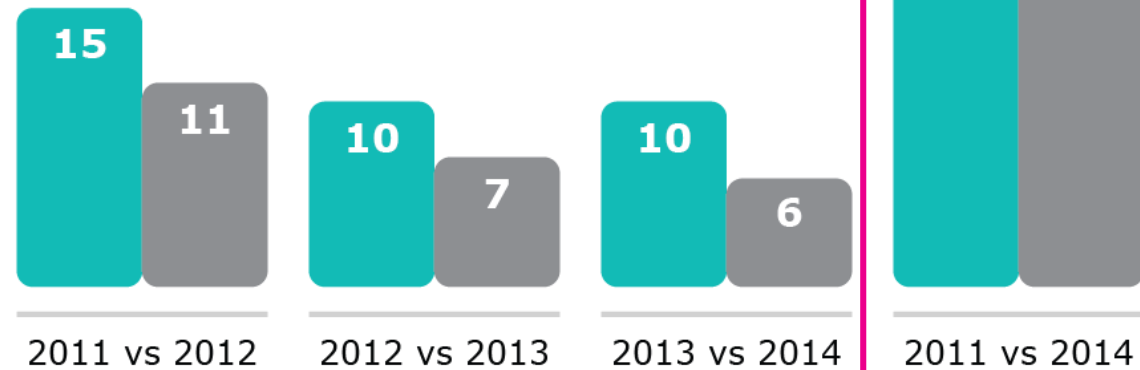
Rich Lehrfeld

Senior VP of Global Brand Marketing & Communications, American Express

tv drives revenue

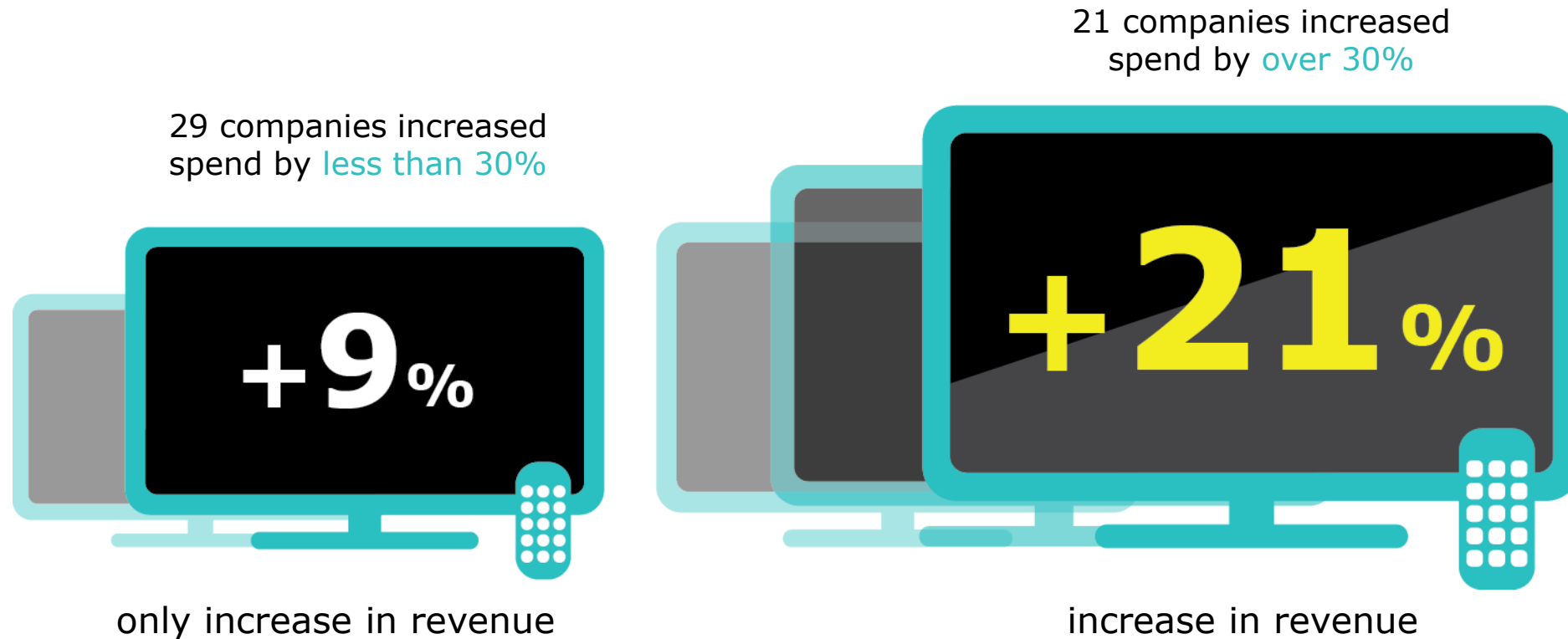
Companies that increased their TV spending saw substantial growth, while companies that decreased TV spending vastly under-performed.

TV SPEND %
REVENUE %

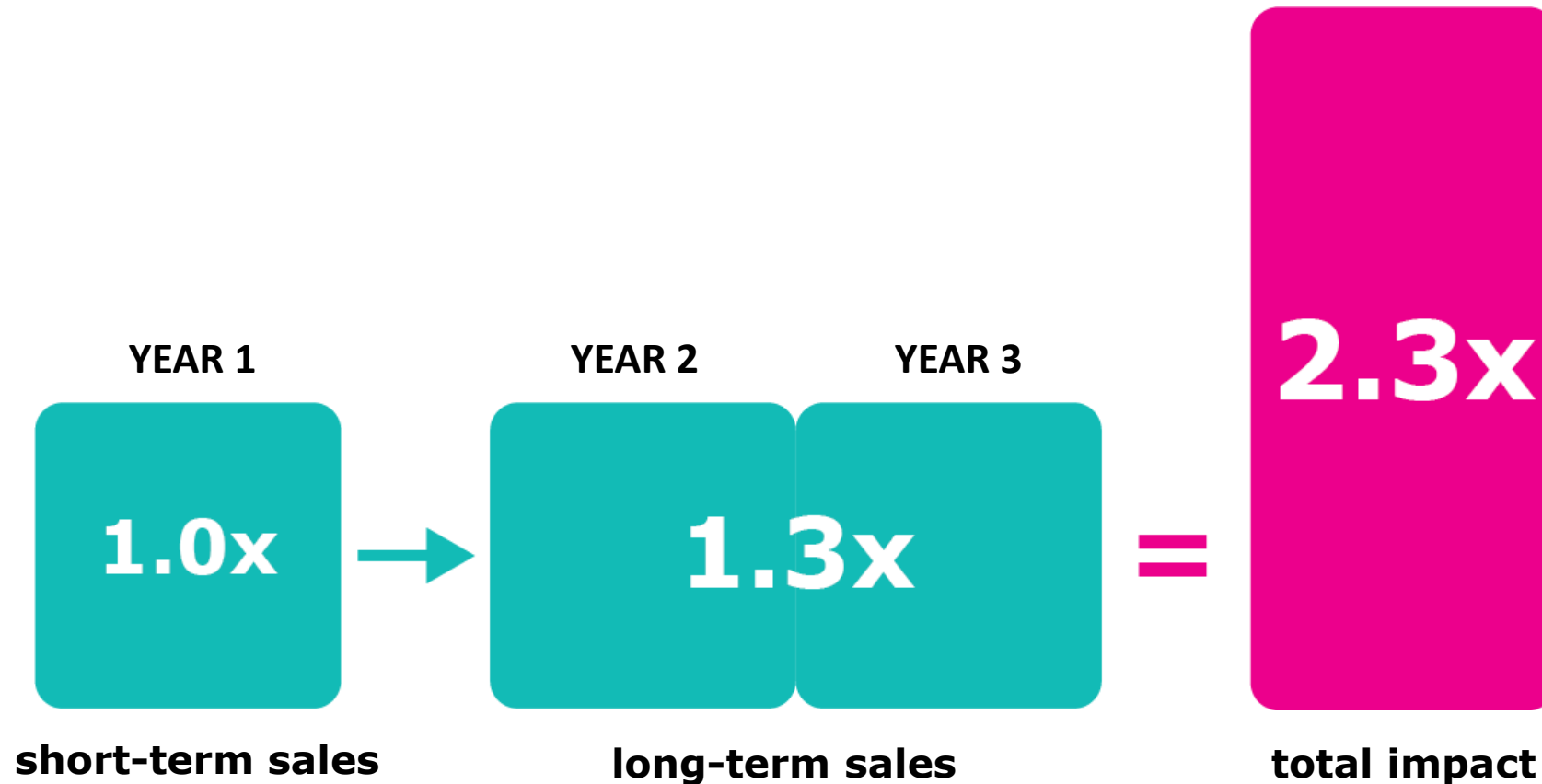


TV spend increase (millions)	+ 32.6	+ 25.7	+ 27.9	+ 86.2
Revenue growth (millions)	+ 1969.8	+ 1437.7	+ 1390.1	+ 4797.7

increased **tv** spend drives **business growth**

**MEDIACOM**

spend in year 1 delivers **brand awareness benefits**
in year 2 and 3



efficiency

TV provides up to 7x the return of other media

‘Profit Ability’: the business case for advertising

[an excerpt]



ebiquity

GAIN
THEORY

thinkbox

an extensive, independent, UK econometric study

Short term return

10 categories

150+ advertisers

1,900 campaigns

Long term return

29 advertisers

500 campaigns



Total advertising performance – Short-Term Profit Return (0-3 mths)

Advertising produces strong short-term ROI; TV performs significantly better than average

All media

£1.51

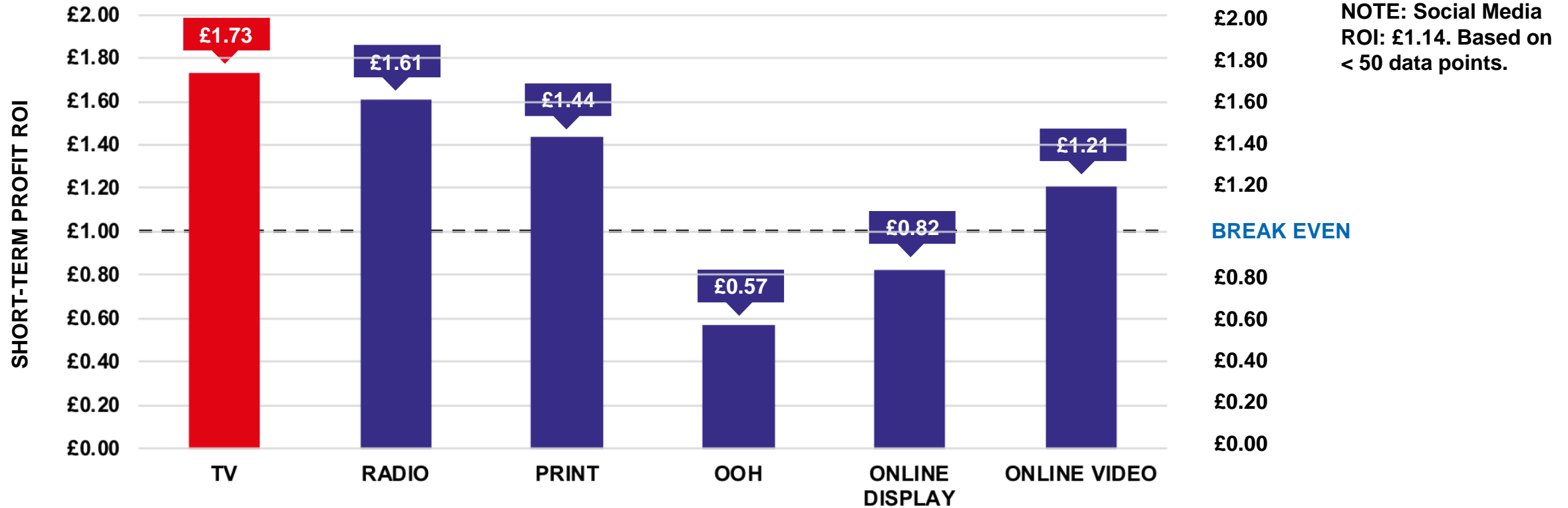
Television

£1.73

The increase of short-term campaigns:

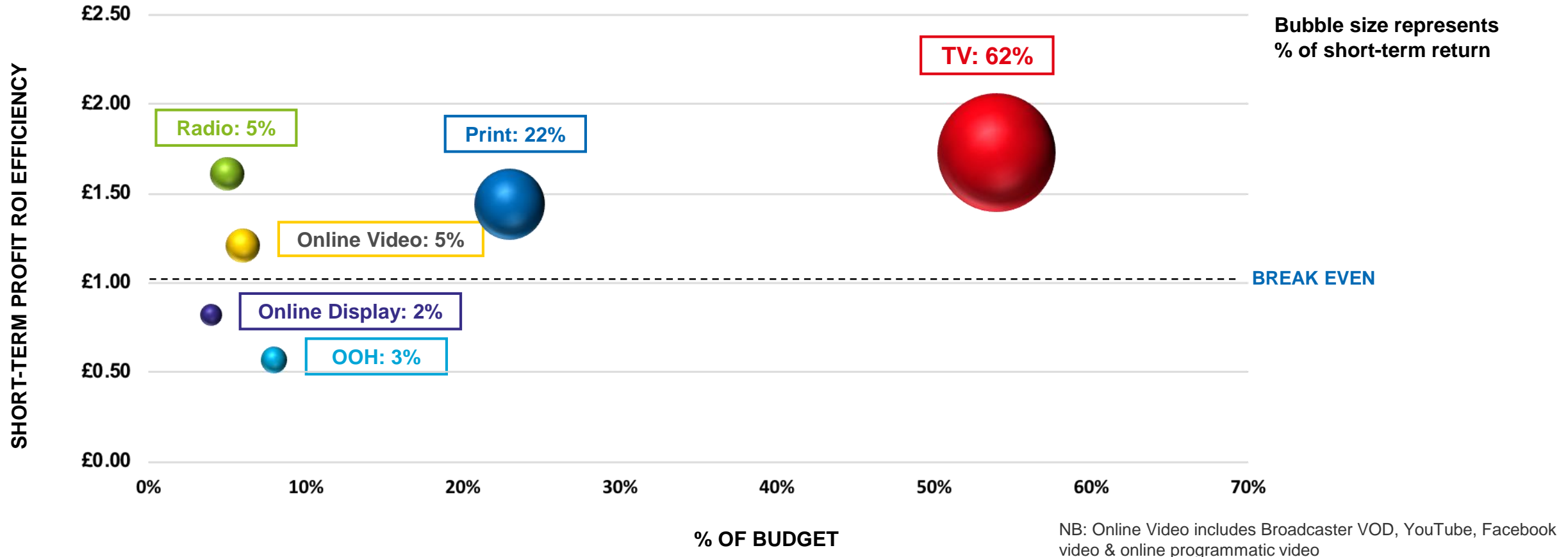
Of note: 10 years ago 25% of campaigns were 6 months or longer in duration; now, only 10% of campaigns exceed 6 months. Check out [Peter Field's presentation](#) on the dangers of short-termism.

TV is the most efficient channel in the short-term



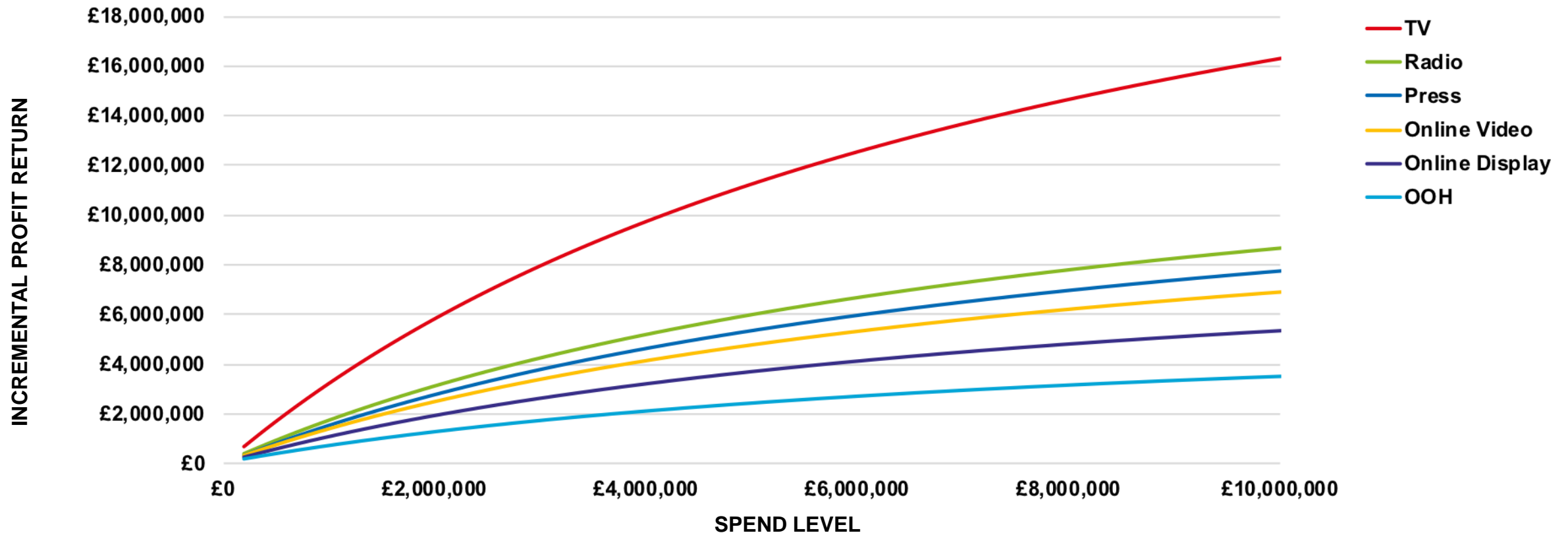
NB: Online Video includes Broadcaster VOD, YouTube, Facebook video & online programmatic video

TV delivers 62% of short-term profit contribution - with only 54% of the spend



Scale is fundamental to high profitability

TV continues to deliver on incremental investment without delivering excessive frequency



NB: Online Video includes Broadcaster VOD, YouTube, Facebook video & online programmatic video

The proportion of total profit revealed by attribution modelling and econometrics

18% Attribution modelling

42% Short-term econometrics

58% Long-term studies

The majority of advertising returns occur in the long-term



When short-term and long-term results are combined, TV outperforms 'all media' by 30%

Total advertising performance – Long-Term Profit Return (up to 3 yrs)

All media

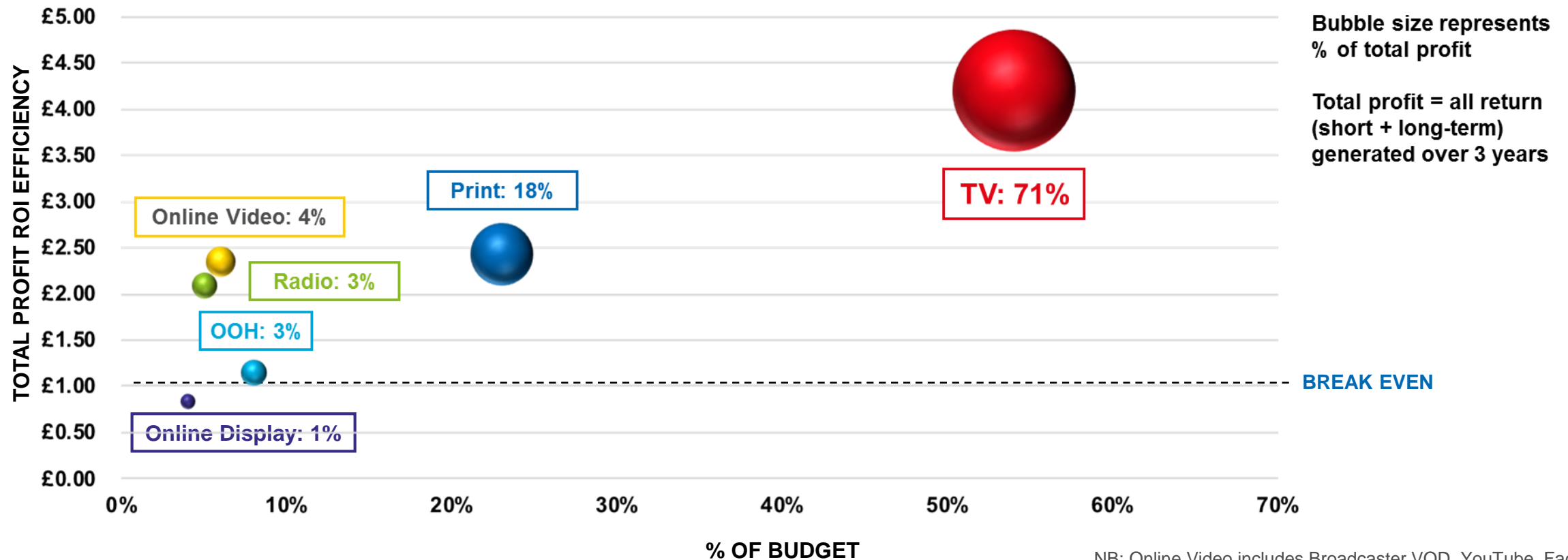
£3.24

Television

£4.20

Proportion of advertising-generated profit by medium

TV's contribution to Profit ROI grows from 62% (short-term results) to 71% in the long-term, over-indexing substantially compared to investment



NB: Online Video includes Broadcaster VOD, YouTube, Facebook video & online programmatic video

Summary

Advertising works - £3.24 profit per £1 spent

Responsible ROI focusses on profit

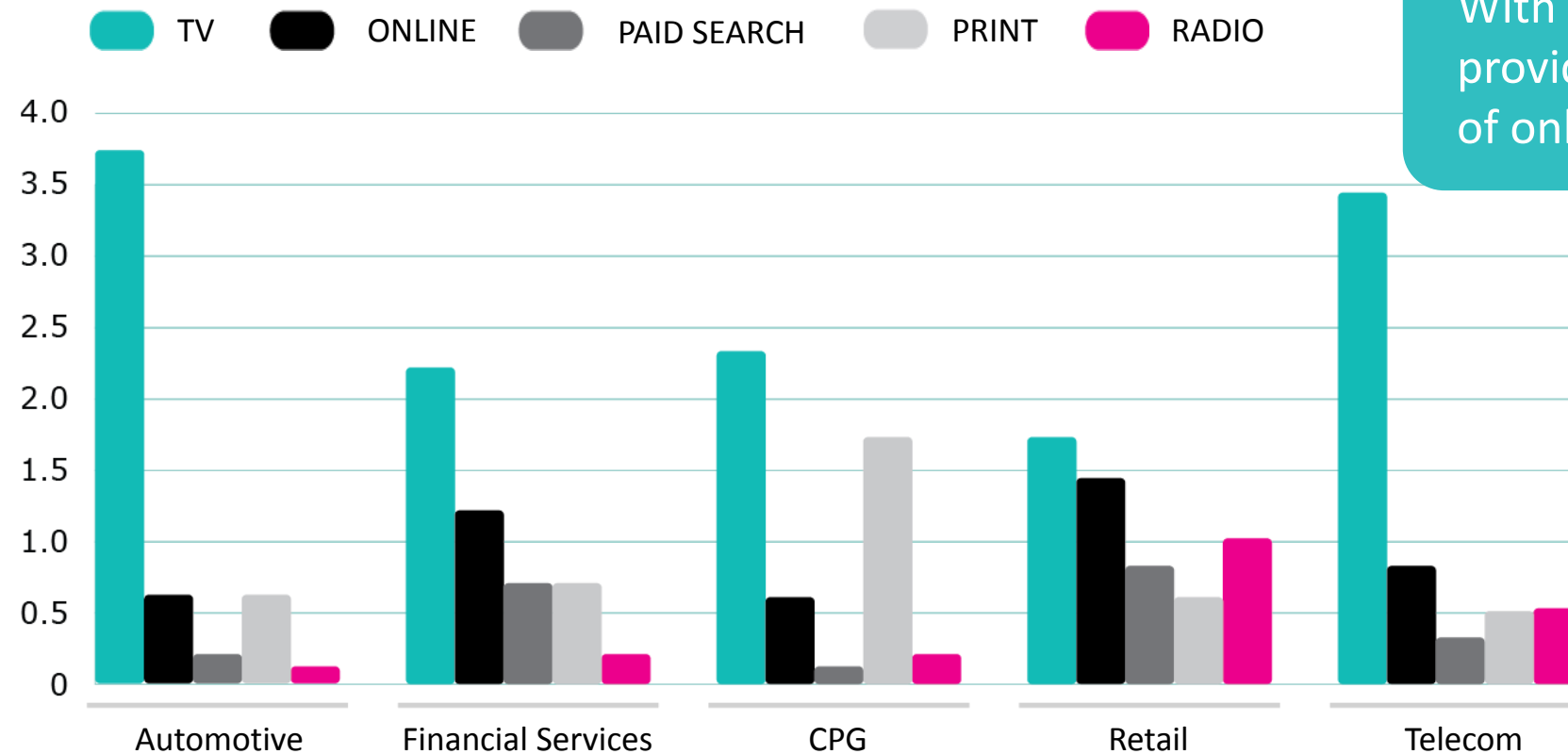
Plan & evaluate across the short **and the longer term**

TV is a fundamental driver of effectiveness

- **Most efficient** channel in the short-term
- Delivers the **highest long-term multiplier**
- The **safest investment**
- **Biggest contributor** to volume of profit



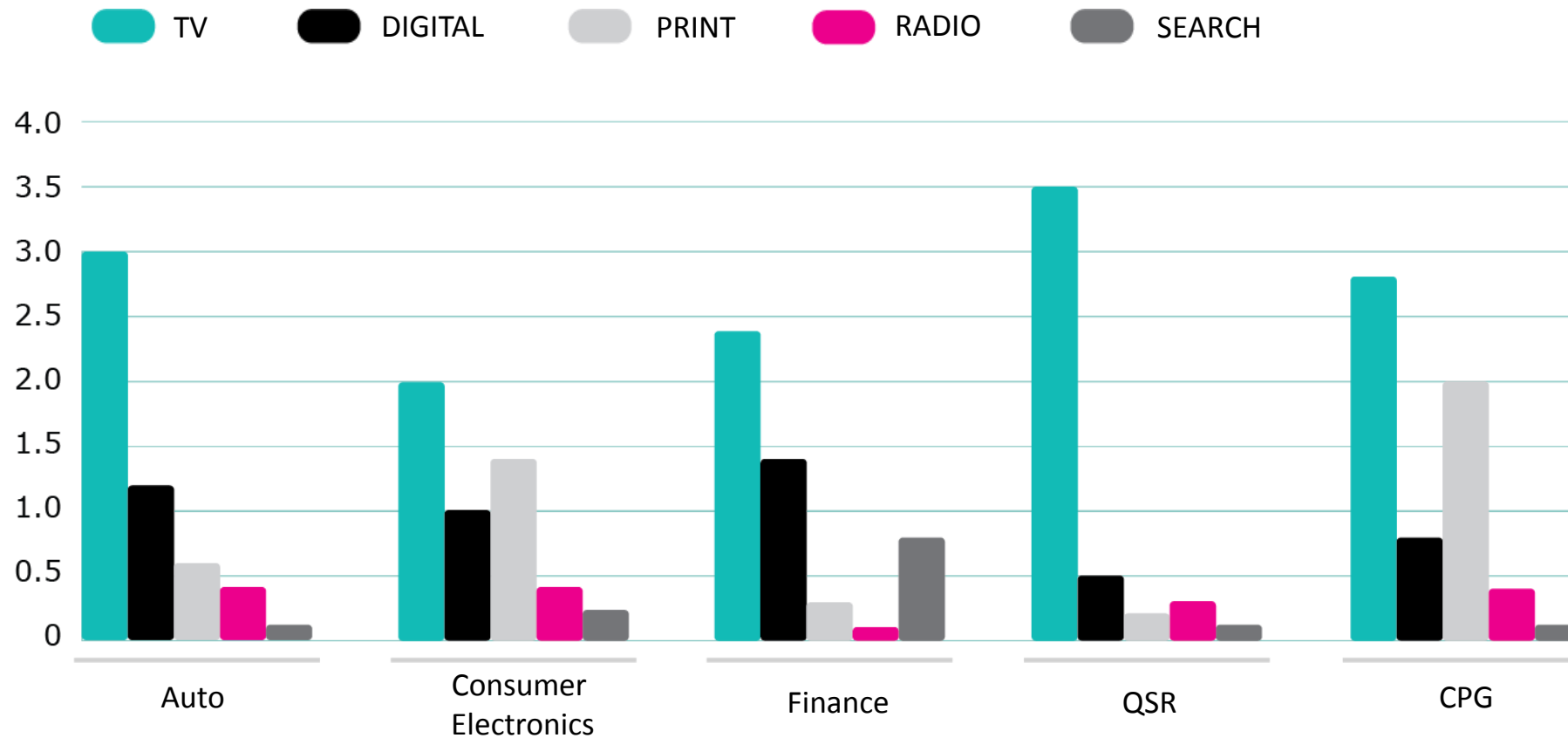
tv is the **most effective** marketing channel across a **wide variety** of industries



With \$1 million to spend, TV provides up to 7x the return of online, print, and radio.

MarketShare

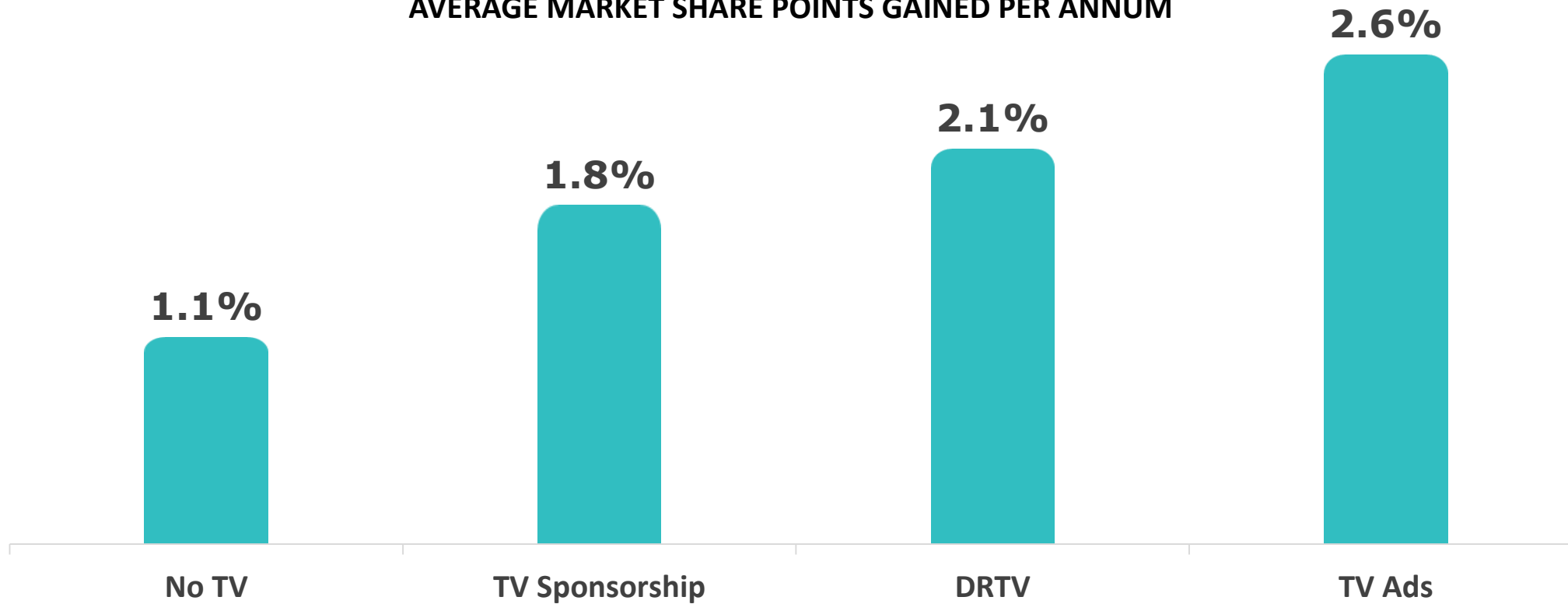
tv has the **highest** relative **lift factor** in outcomes

**MEDIACOM**

tv drives market share growth

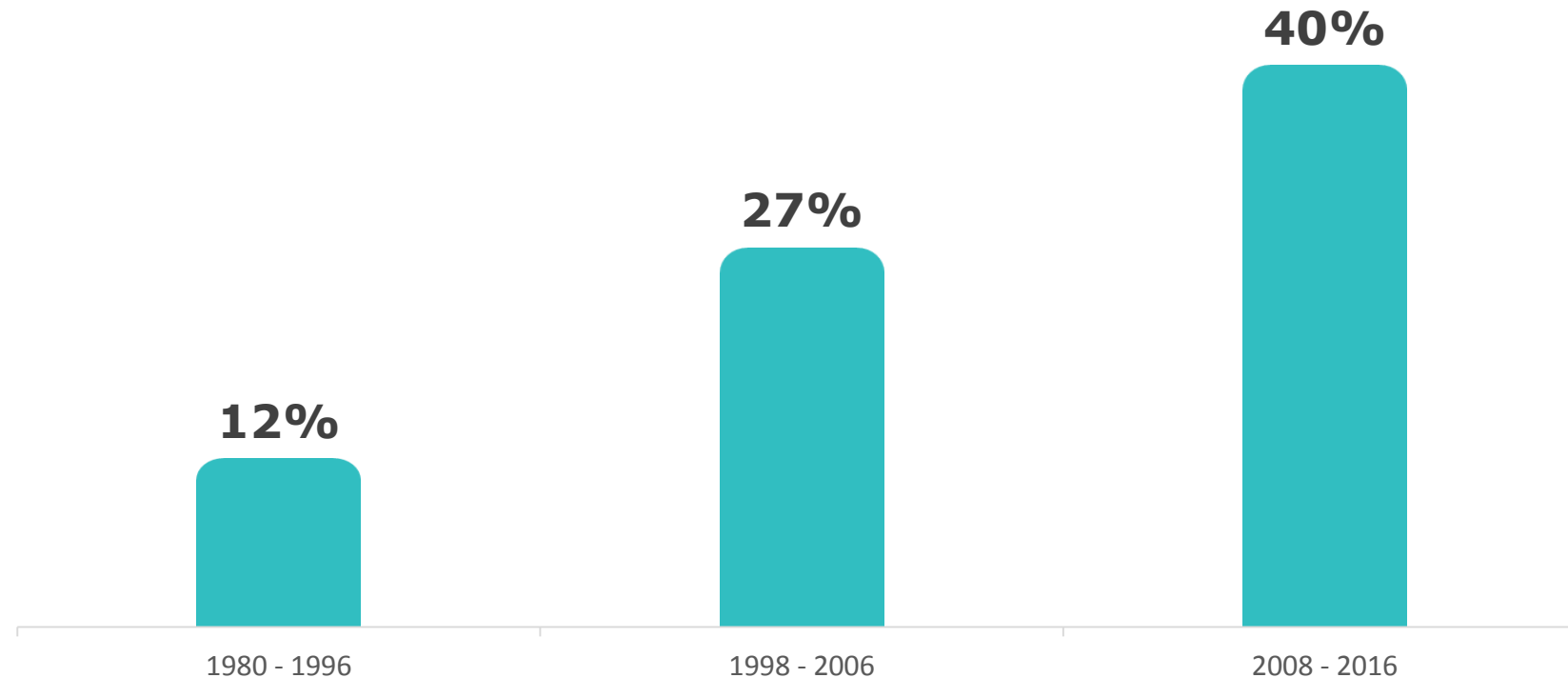
Adding TV advertising drove an incremental 1.5% market share growth

AVERAGE MARKET SHARE POINTS GAINED PER ANNUM



tv has become **more** effective

TV heightens impact of investments in brand building AND activation campaigns

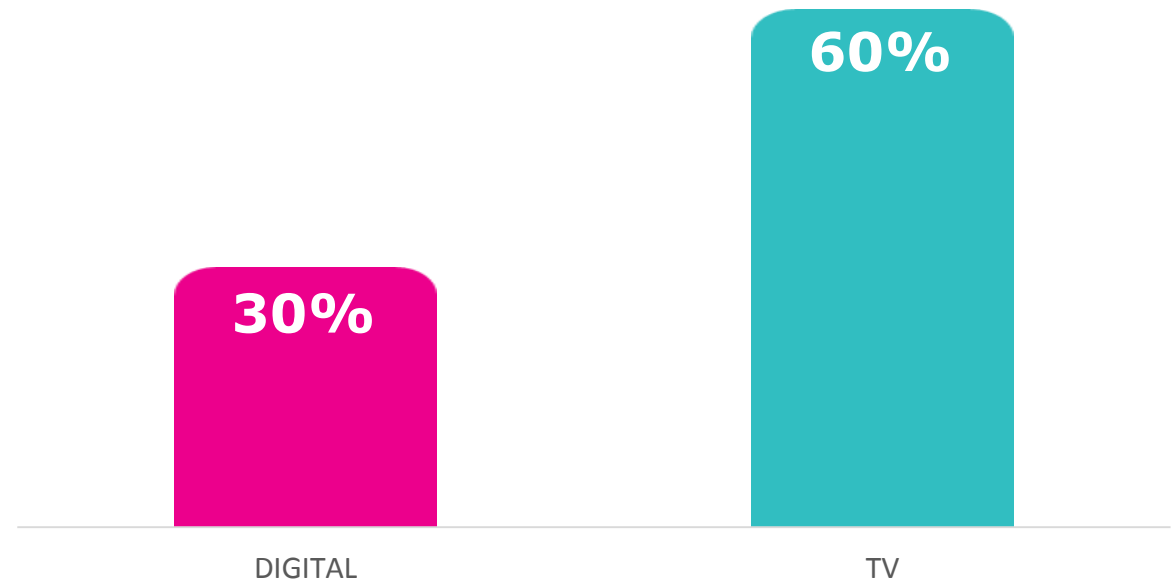


Percentage increase in average number of very large business effects from adding TV

"traditional media is indispensable."

Advertising in traditional media, and specifically **television**, is far **more effective than digital at driving** consumer recall and purchase intent for mainstream FMCG brands.

Ads on TV deliver **DOUBLE** the 'recollected' reach of Digital



BAIN & COMPANY 



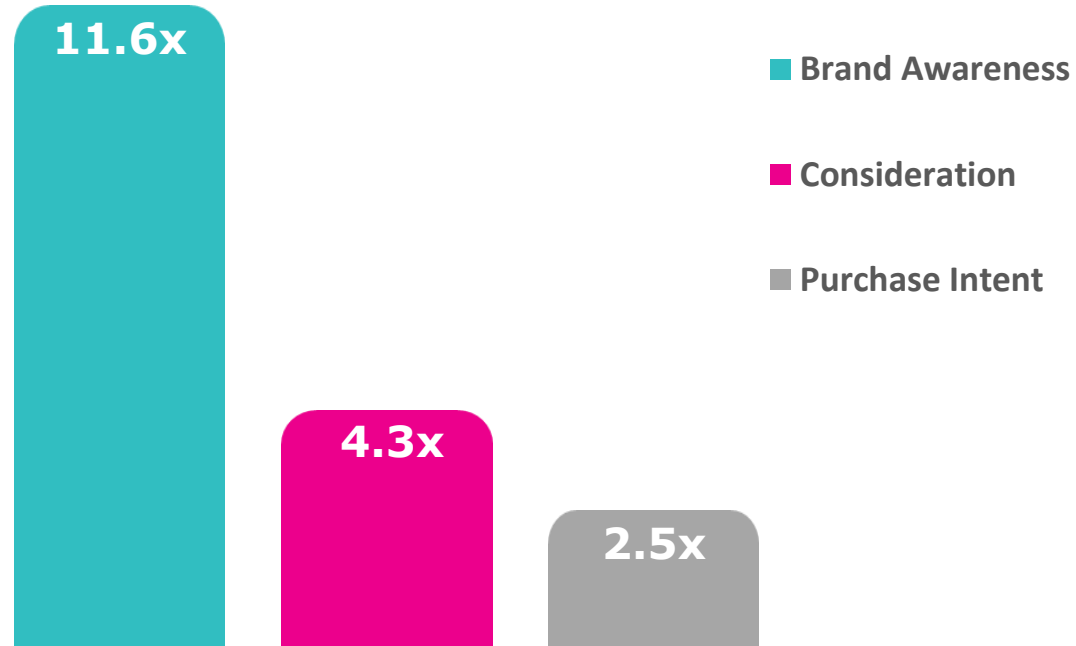
**"TV offers the best ROI
across all media."**

Former Coca-Cola Co. global CMO, Marcos de Quinto

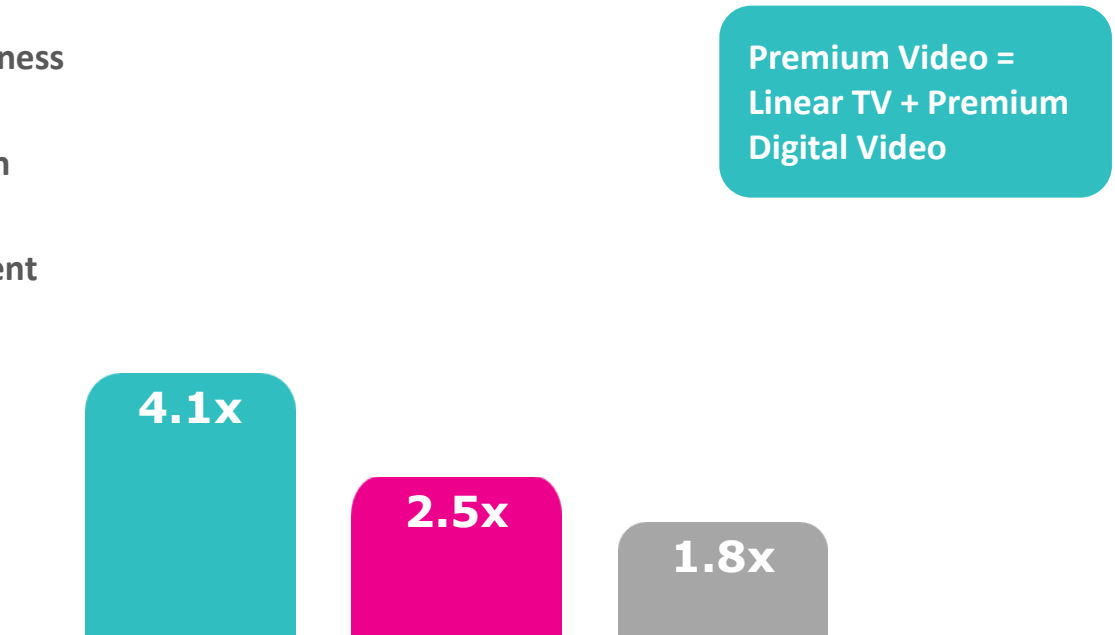
Coca-Cola's research found that their **TV investment returned \$2.13 for every dollar spent**, compared with \$1.26 for digital.

premium video delivers higher brand ROI

VS SHORTFORM VIDEO



VS PAID SOCIAL



Premium Video =
Linear TV + Premium
Digital Video

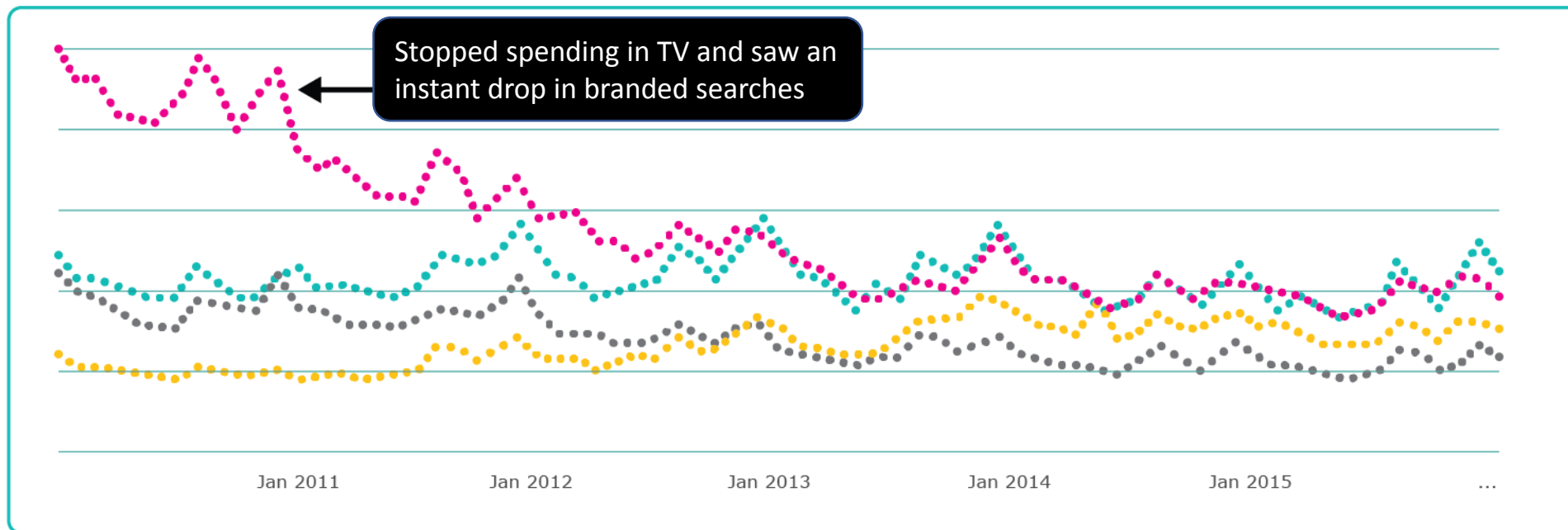
accenture > NBCUniversal

**For every \$1 “saved” in
TV spend, the drop in
sales return was \$3**



tv and digital are **interdependent**

- Brand X
Computer company
- Asus
Computer hardware
- Acer
Electronics company
- Lenovo
Computer manufacturing



things to consider when planning your media

Where is your customer spending time?

- Canadians watch 25 hours of TV per week – even Millennials watch 14 hours of TV / week
- TV has unparalleled, unduplicated reach, reaching 94% of Adults each week

Where is your customer paying attention?

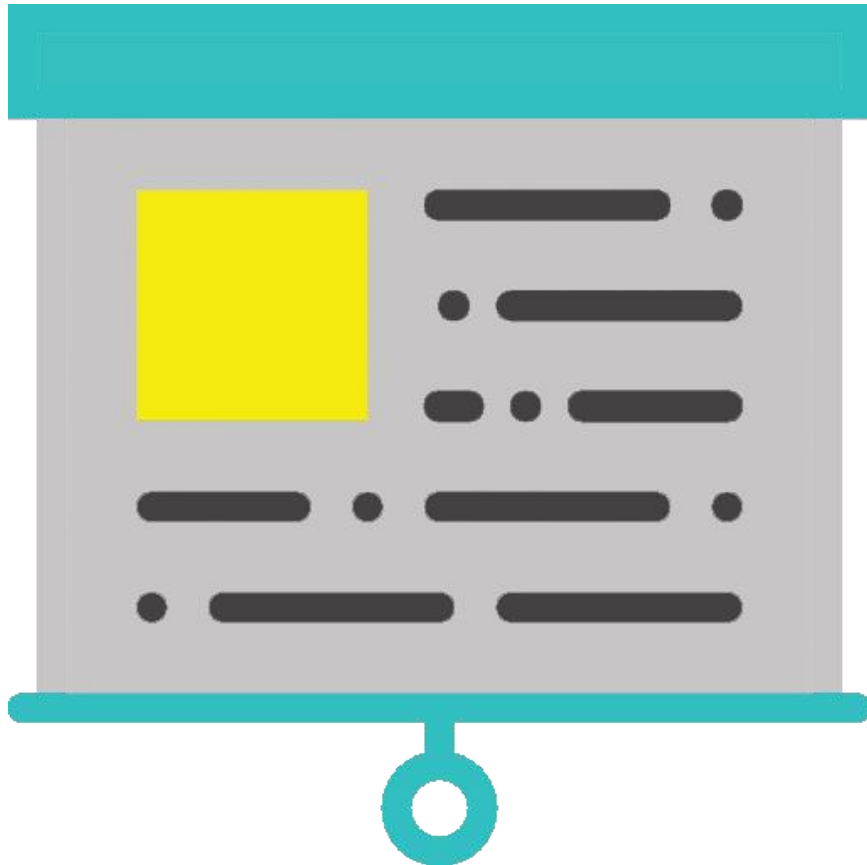
- Canadians of all ages say they are most likely to pay attention to TV ads, which are also the most engaging, influential and trustworthy ads

What will drive business results?

- Countless econometric models prove that TV advertising has the highest efficiency of all media
- A reduction in TV spend negatively impacts sales and the efficiency of every other medium used

TV advertising creates demand by reaching and engaging a large market, driving sales in the most effective and efficient way

want to learn more about the **unparalleled**
power of **tv** ? **we'll come visit you!**



Contact us today for a
PRESENTATION



info@thinktv.ca



[Sign up for our
newsletter](#)

Sources

- Slide 3:** Based on 900 (6 weeks x150 GRPs) GRP campaign, Total Canada, Ind. 2+, Numeris 2017-18 population estimates.
- Slide 4, 6, 8:** Numeris PPM, Total Canada, Total TV, Consolidated, All Locations, Ind. 2+, M-Su 2a-2a, Fall-Win-Spr 2017-18 (Sept 11, 2017 – May 27, 2018)
- Slide 7:** Television: Numeris PPM, Total Canada, Total TV, Consolidated, All Locations, Mo-Su 2a-2a, A18+, Fall-Win-Spr 2017-18 (Sept 11, 2017 - May 27, 2018) | Internet (Daily Reach), Radio, Daily Newspaper, Magazine: Numeris RTS, Canada, average Fall 2017/Spring 2018 | Internet (Weekly Hours): comScore Media Metrix; Multi-Platform; Sept 2017 – April 2018 (Note: Numeris population estimates used to calculate average weekly hours per capita).
- Slides 9, 10:** Total TV, Live TV, PVR: Numeris, PPM, Total Canada, Consolidated, All Locations, Mo-Su 2a-2a, Sept 11, 2017 – May 27, 2018 | Facebook.com, Instagram.com, Twitter.com, Snapchat, Inc.: comScore Media Metrix Multi-Platform, Canada, Sept 2017 – May 2018 | YouTube: comScore Video Metrix Multi-Platform, Canada, Sept 2017 – May 2018 | Netflix: Numeris Diary, Total Canada, average Fall 2017/Spring 2018. (Note: Numeris population estimates used to calculate average weekly hours per capita for digital media)
- Slide 11:** Numeris PPM, Total Canada, Total TV, Consolidated, All Locations, M-Su 2a-2a | CTV Com, Monday & Thursday first airings, Sept 11, 2017 – May 27, 2018.
- Slide 13:** CBS Vision; Nielsen Total Ad Ratings; 2013-14; Only, Both Analysis; Excludes campaigns that had less than 1M online impressions
- Slides 16, 17:** think^{tv}, nlogic, omniVu, National, March 2018 (Don't Know/Refuse not included).
- Slides 18,19:** think^{tv}, nlogic, omniVu, National, June 2017 (Don't Know/Refuse not included).
- Slide 20:** RTDNA Canada, Ipsos, Trust and Confidence in News Sources, May 2018
- Slide 21:** GroupM Canada, 2016; Marketing Mix models across Consumer Electronics, Retail, Finance, Auto and CPG; Target the (Whole) Market
- Slide 22:** Ad Dynamics Advertising Expenditures, Internet related sites & services category + Expedia Inc. (Hotels.com)+ Priceline Group Inc. + Wayfair LLC + Sunwing Travel Group + E-Harmony.com Inc. + Elite Singles + Indeed + Justfabulous LLC + Web.com Group
- Slide 25:** Video Advertising Bureau; TV Spend from Nielsen Ad*Views; Domestic Revenue from publicly-reported financial documents.

Sources

- Slide 26:** MediaCom; “Missed Opportunities in Media Planning” whitepaper; Stats from Nielsen, April 2016. Public financial statements.
- Slide 27:** Accenture Strategy, ABC; Cross-channel advertising attribution; New insights into multi-platform TV, May 2016
- Slide 31, 36:** ‘Profit Ability: the business case for advertising’, November 2017 Ebiquity ROI campaign database (Jan’08-May’17). Campaign obs: 6000
- Slide 32,33,37:** ‘Profit Ability: the business case for advertising’, November 2017 Ebiquity ROI campaign database (Feb’14-May’17). Campaign obs: 1954
- Slide 34:** ‘Profit Ability: the business case for advertising’, Nov 2017 Ebiquity ROI campaign database. Financial Services example
- Slide 35:** ‘Profit Ability: the business case for advertising’, November 2017 Gain Theory long-term ROI study
- Slide 39:** MarketShare; Why TV is Still the Most Effective Medium, Jan. 2016
- Slide 40:** MediaCom, 2015-16: Econometric Marketing Mix Models of clients across 5 categories: Auto, Retail Consumer Electronics, Finance, QSR & CPG.; Target the (Whole) Market.
- Slide 41-42:** IPA, Marketing in the Digital Age, Field & Binet, 2016; Target the (Whole) Market
- Slide 43:** Bain & Company, Feb 2017
- Slide 45:** Accenture, NBC Universal; Quantifying the Connection: Premium Video + Brand Building – 2017
- Slide 46:** TiVo research presented as part of ARF Experiential Learning: Re!Think 2016.
- Slide 47:** Google trends, April 2016, MediaCom; “Missed Opportunities in Media Planning” whitepaper

Sources

- Slide 39:** MarketShare; Why TV is Still the Most Effective Medium, Jan. 2016
- Slide 40:** MediaCom, 2015-16: Econometric Marketing Mix Models of clients across 5 categories: Auto, Retail Consumer Electronics, Finance, QSR & CPG.; Target the (Whole) Market.
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