

A graphic consisting of several concentric circles of varying shades of gray, centered on the left side of the slide. The circles are of different diameters and are spaced out, creating a ripple effect that draws the eye towards the center.

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

the ubiquity of **tv** :



**tv reaches**  
**28,540,000**  
**Canadians every day**

**121**

**million**  
hours

**time spent  
with tv yesterday**

**92%**

of  
**Canadians**

**tv's weekly  
reach**

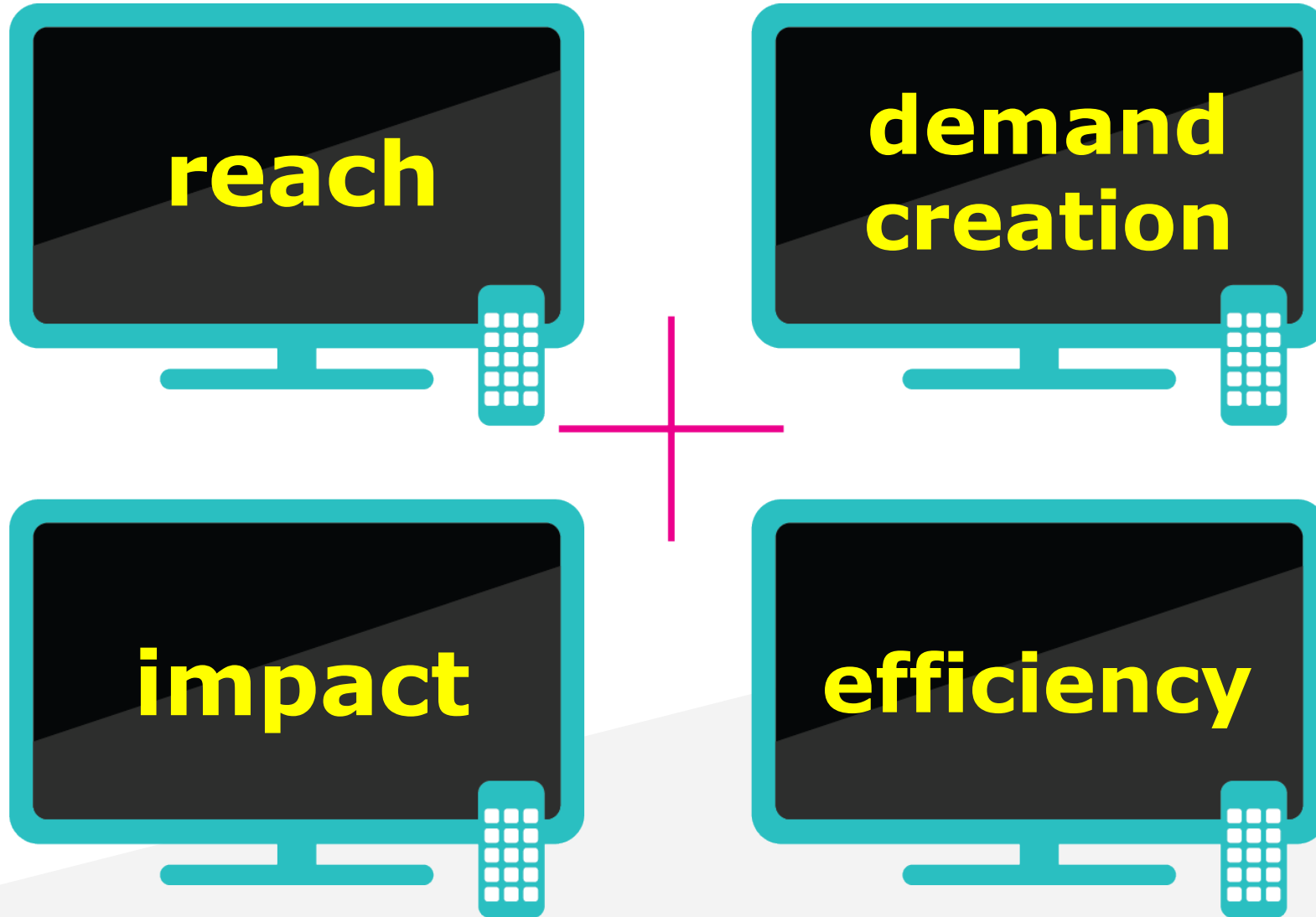
the average **tv** campaign delivers

**327** million impressions



**think**<sup>tv</sup>

**tv** is powerful because it delivers:

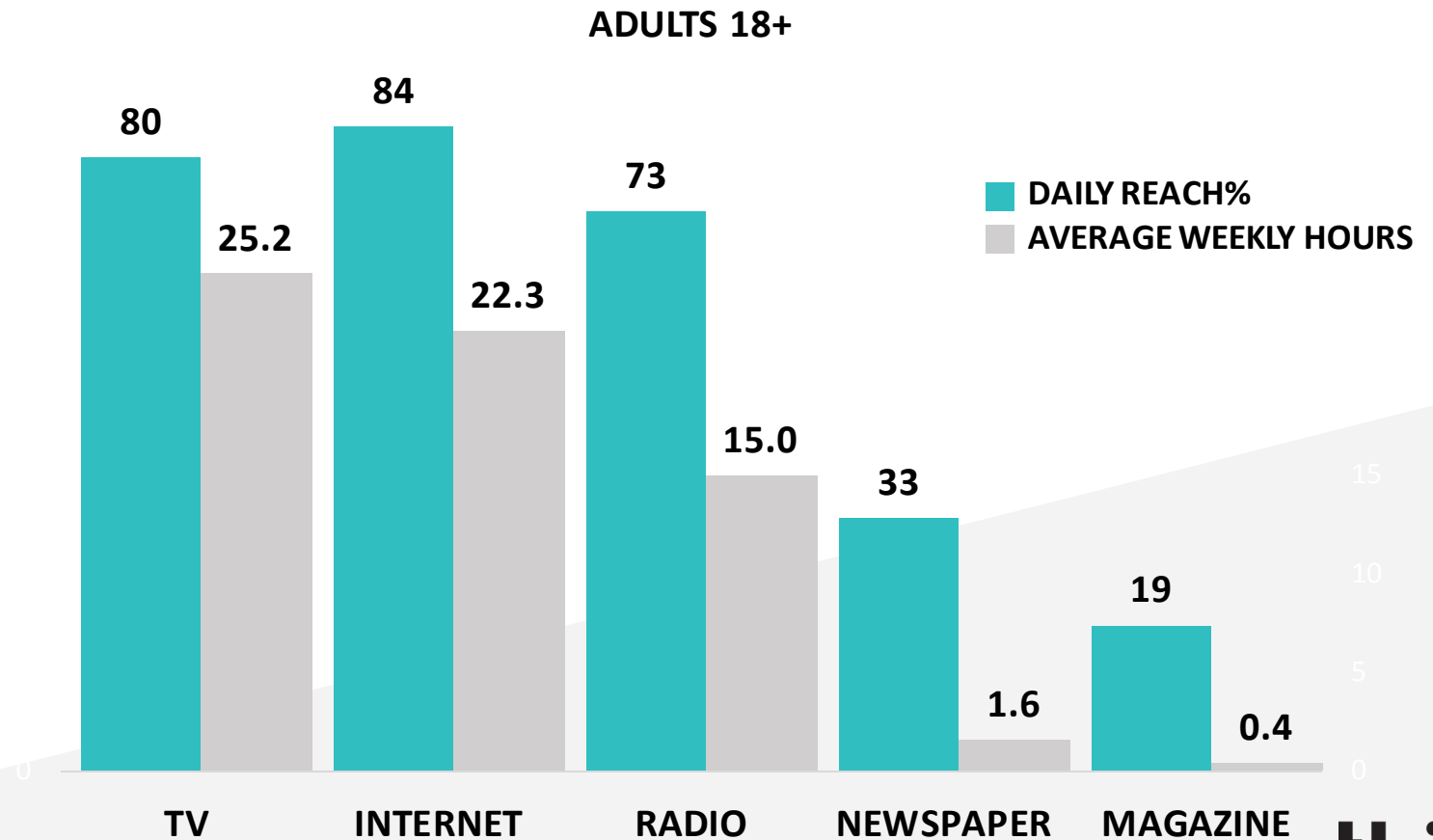


# reach

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**33 million** Canadians every week

# **tv** reaches **80%** of Canadian Adults **daily** and **93% weekly**





**tv** reaches **92%**  
of Canadians  
every week

**weekly reach**

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**93%**

**adults (18+)**

**86%**

**young adults (18-34)**

**88%**

**kids (2-11)**

**think**<sup>tv</sup>

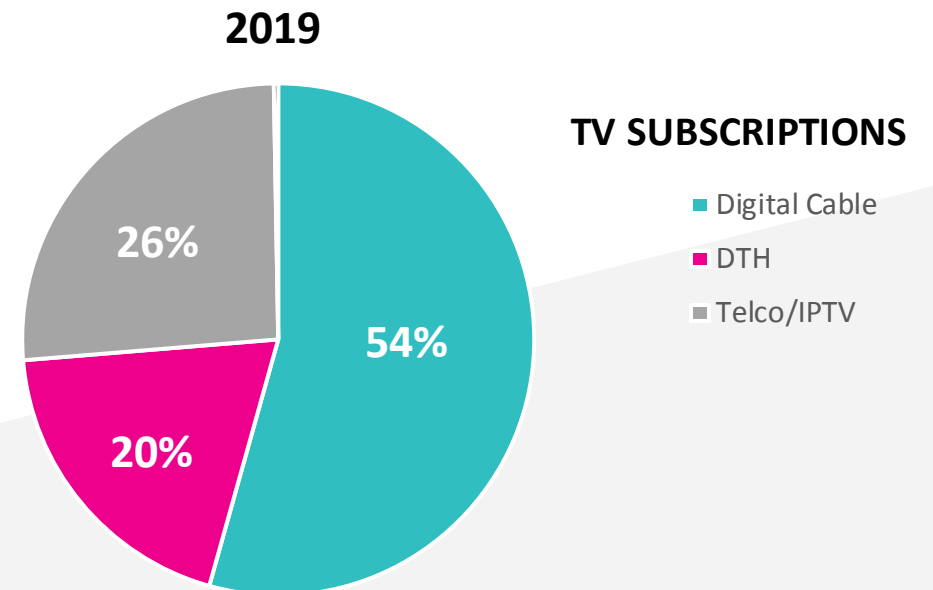


# 11 million Canadian HH's have a paid TV subscription

Cord cutting has been far overstated: TV subscriptions have evolved, and we've seen subscriptions move from cable to IPTV, but total subs are only down 1%.

The notion that "no millennials subscribe to TV" is also false: 63% of 18-34 year olds subscribe to TV, and they're also accessing linear TV out-of-home and via streaming (which is how TV is able to reach 86% of A18-34 on a weekly basis).

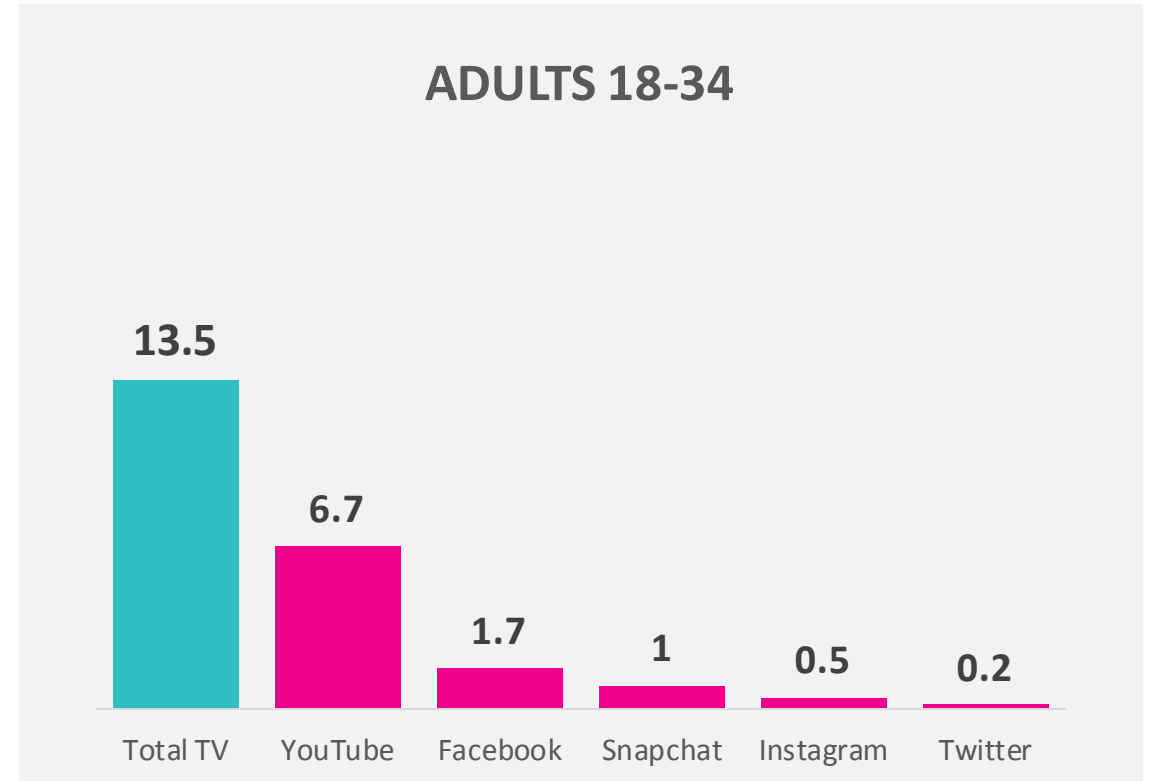
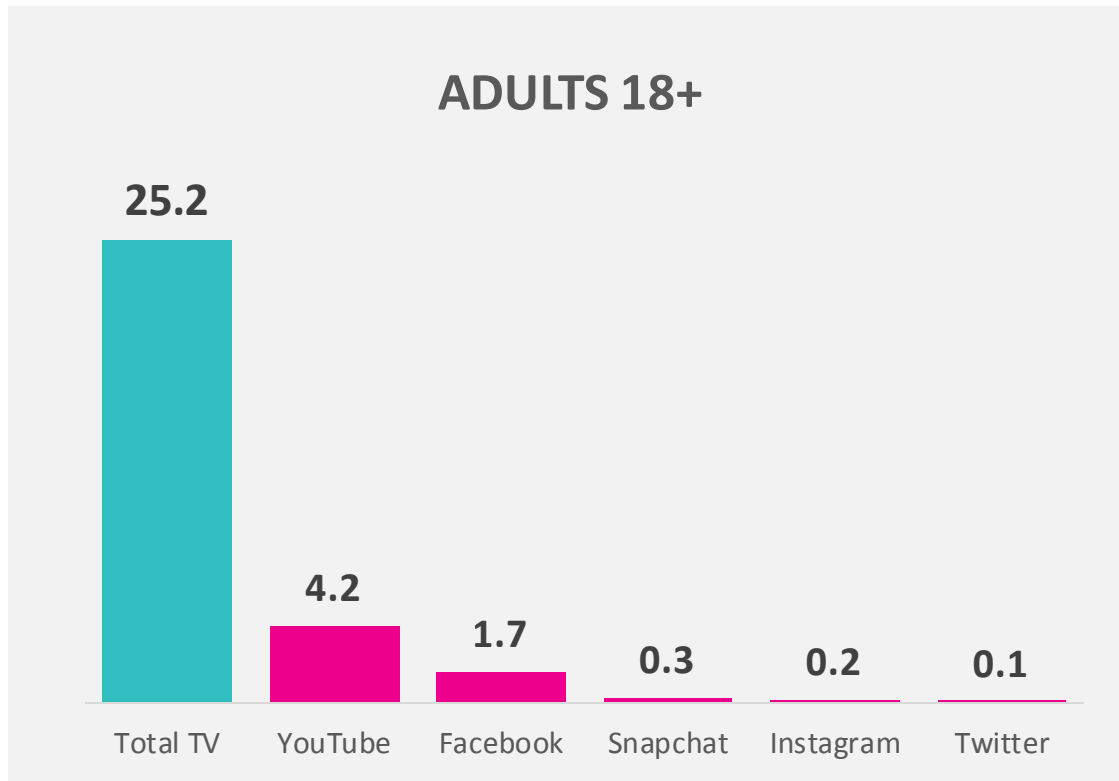
	Jan '19	Jan '18	% Change
<b>Total Subscribers</b>	10,718,292	10,853,659	-1.2%
Digital Cable	5,824,709	6,020,036	-3.2%
DTH	2,074,493	2,219,332	-6.5%
TELCO/IPTV	2,789,614	2,585,737	<b>+7.9%</b>
Other	29,476	28,554	<b>+3.2%</b>





# dominates time spent

## AVERAGE WEEKLY HOURS





**“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

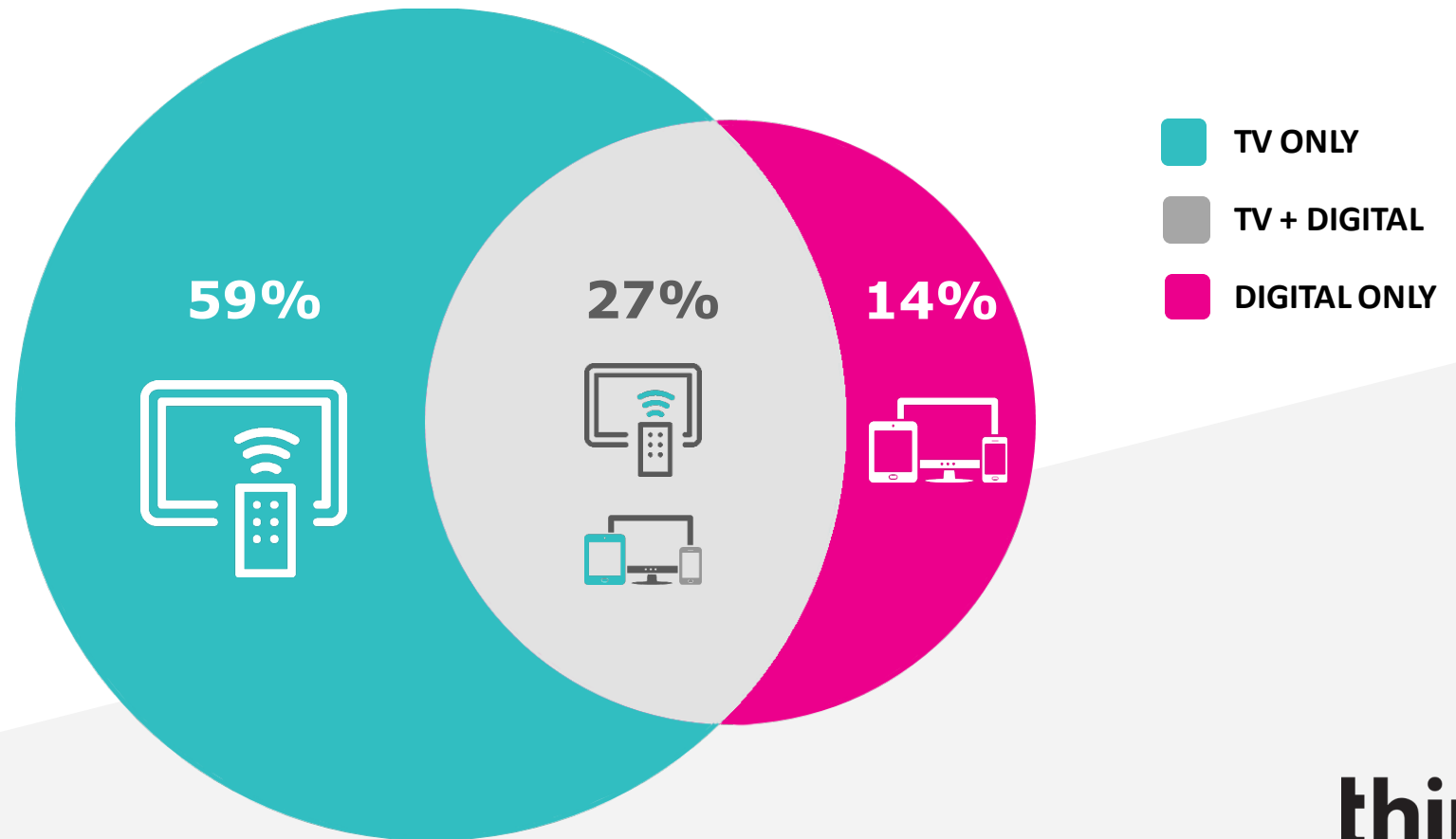
Professor of Marketing Science, University of South Australia

# tv is the primary driver of reach

## AVERAGE TARGET UNIQUE AUDIENCE A18-49

TV is the primary driver of reach even in cross-platform campaigns. A Nielsen study found:

- For campaigns that targeted Adults 18-49, the average number of **impressions from TV was nearly 8x greater** than impressions from digital.
- **TV delivered 86% of the reached target:** 59% were reached through TV only, and 27% were reached via both TV and digital.



# impact

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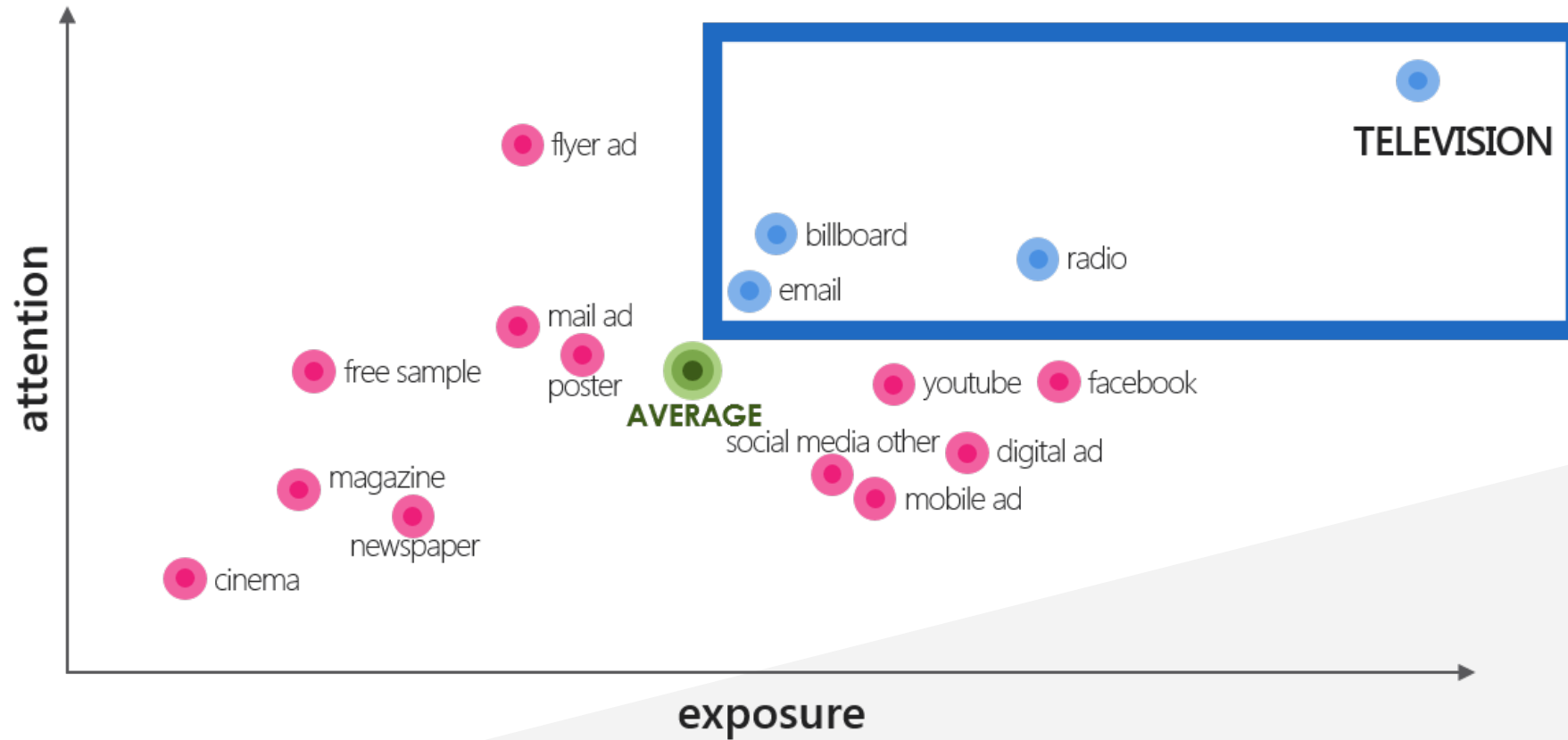
tv ads are most influential



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

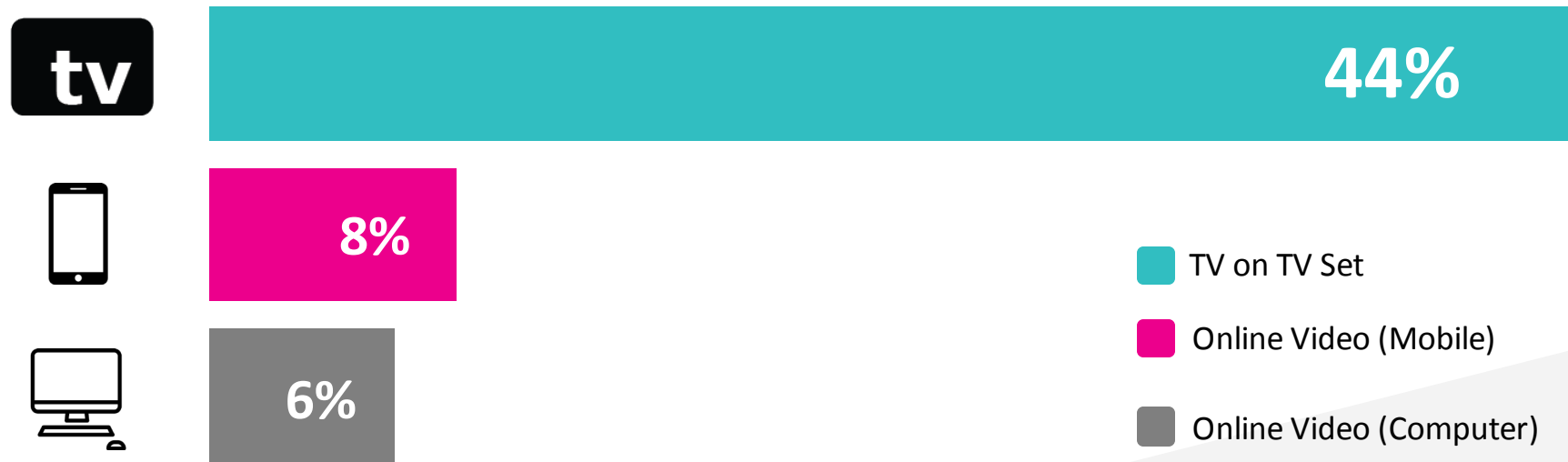
*Leo Burnett*

# when it comes to **exposure** and **attention**, **tv** is king



# Canadians pay **most attention** to ads on **tv**

Q. When do you pay the MOST ATTENTION to advertising? While watching...



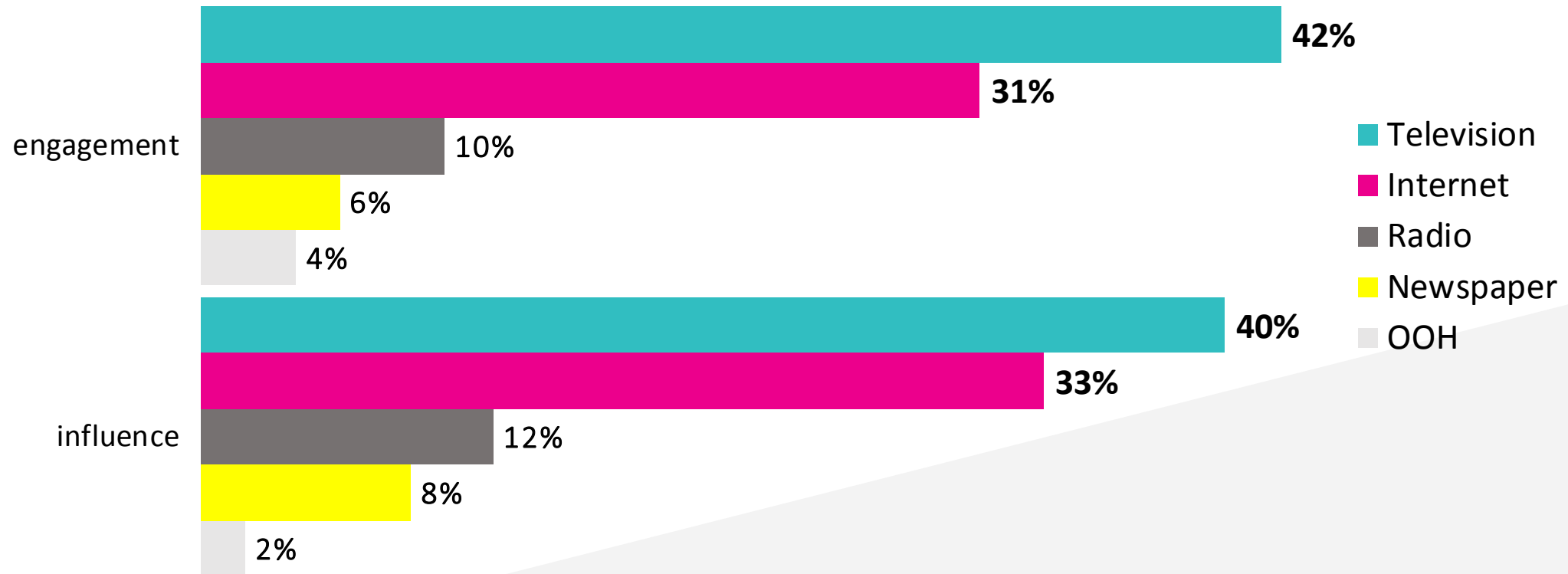
(Radio = 17%; Using a social network = 11%; Using a search engine = 7%)



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

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

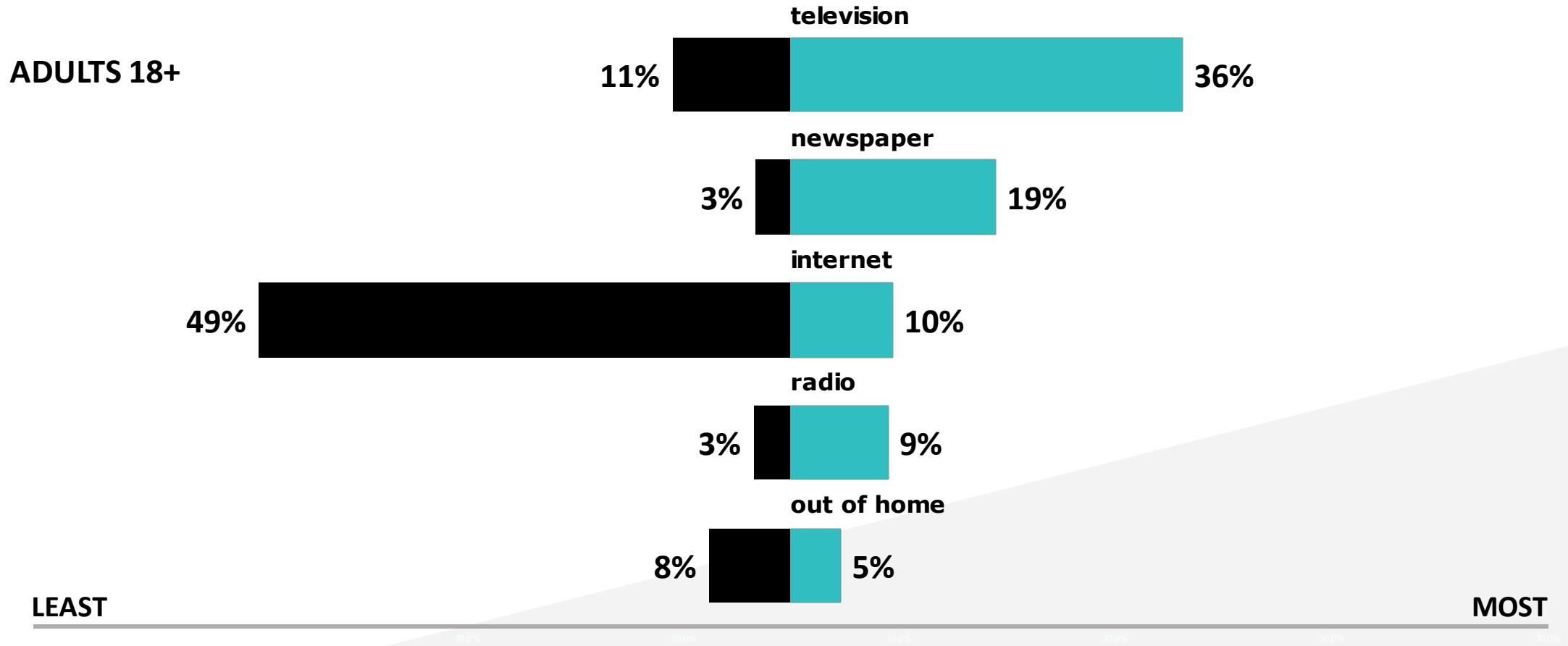
## ADULTS 18+



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

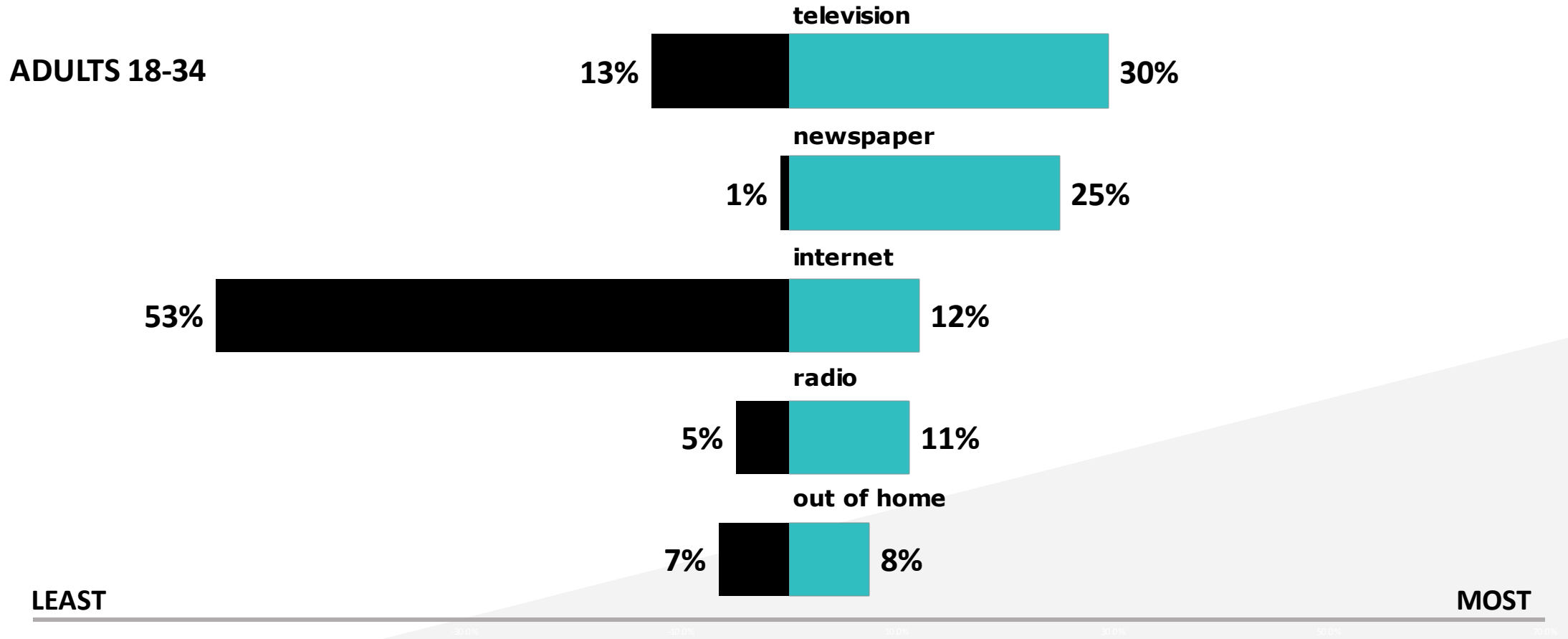
# tv carries most trustworthy advertising

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

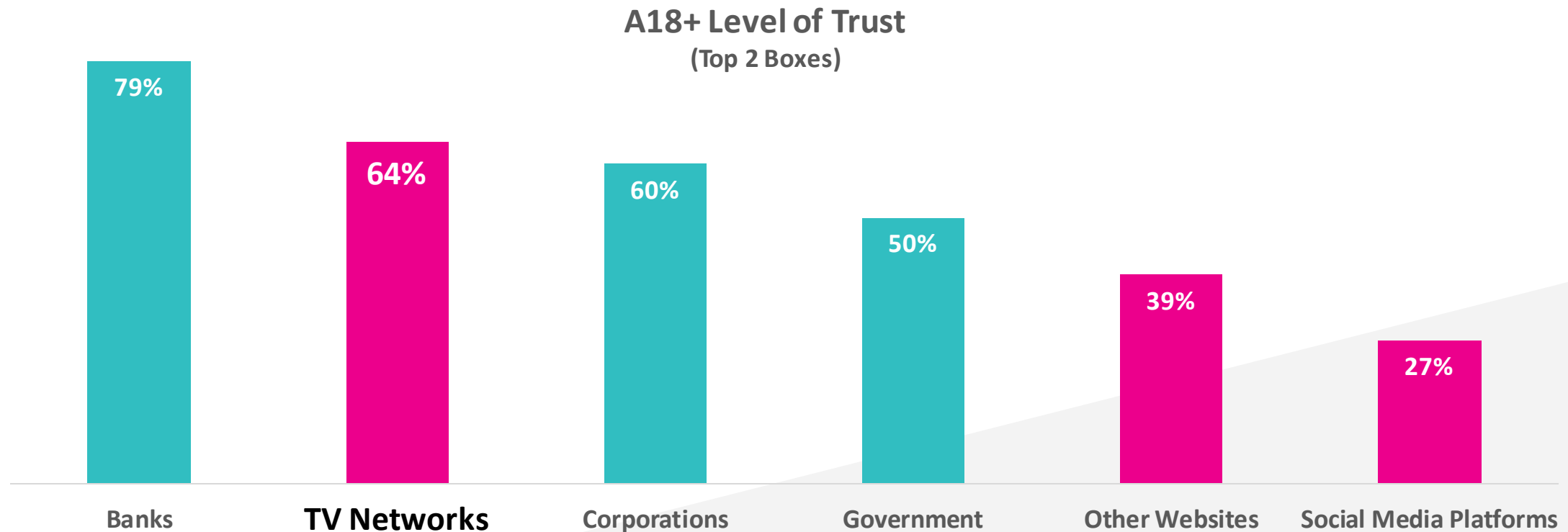


# digital natives agree: **tv** ads most trusted

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



# in fact, TV networks amongst **the most trusted** organizations in Canada

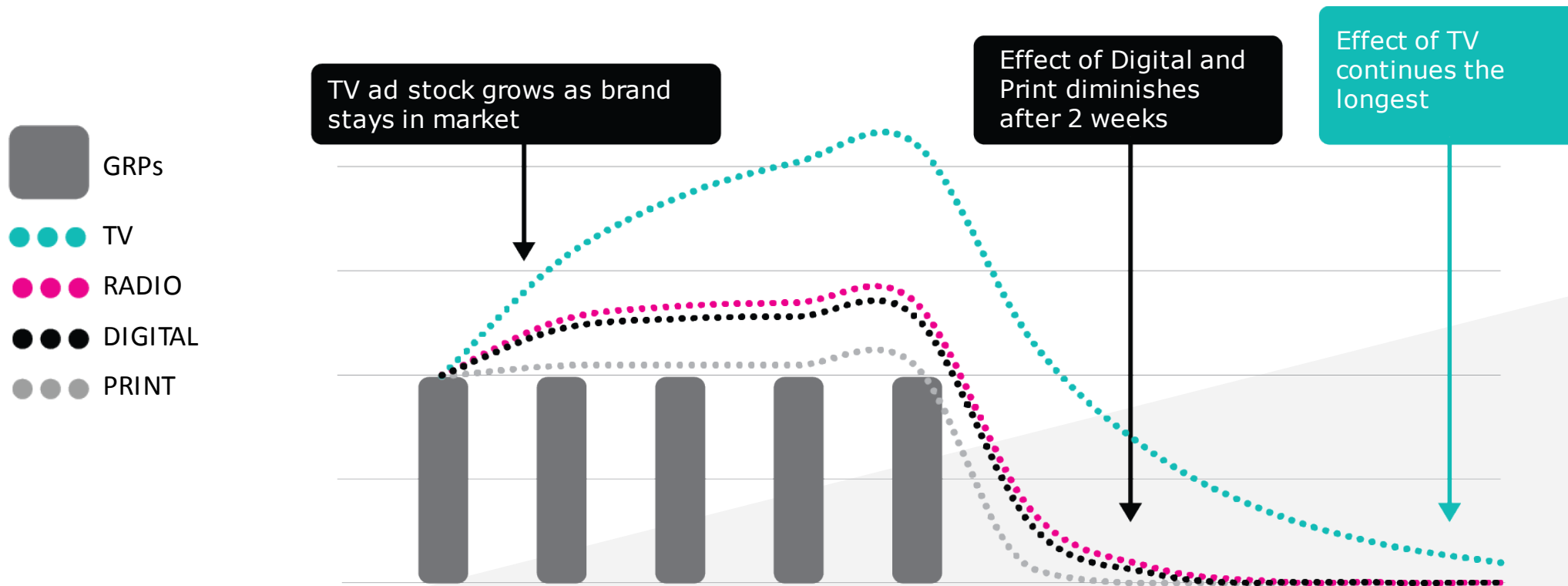


**Q. How much trust do you have in the following;**

a) Complete trust | b) Fair amount of trust | c) Not very much trust | d) No trust at all

# tv ads deliver the biggest impact

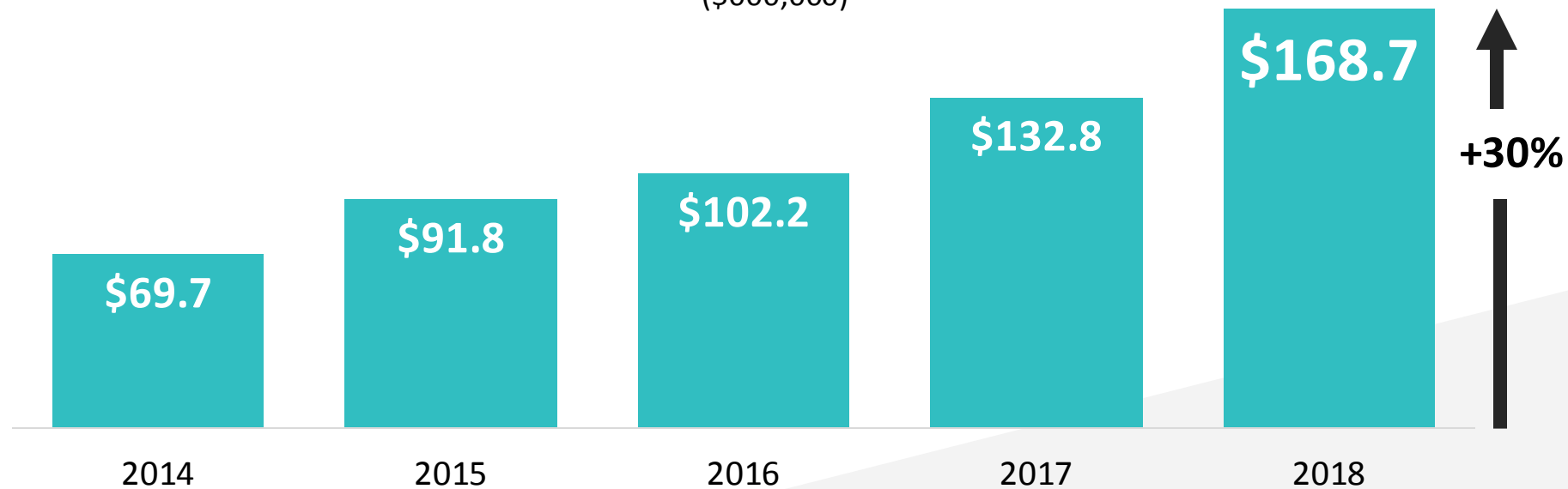
the adstock of a TV spot grows the fastest and lasts the longest



# digital companies know **tv** works!

TV spend by internet-related companies is up 30% from last year

TV SPEND BY INTERNET BUSINESSES  
(\$000,000)



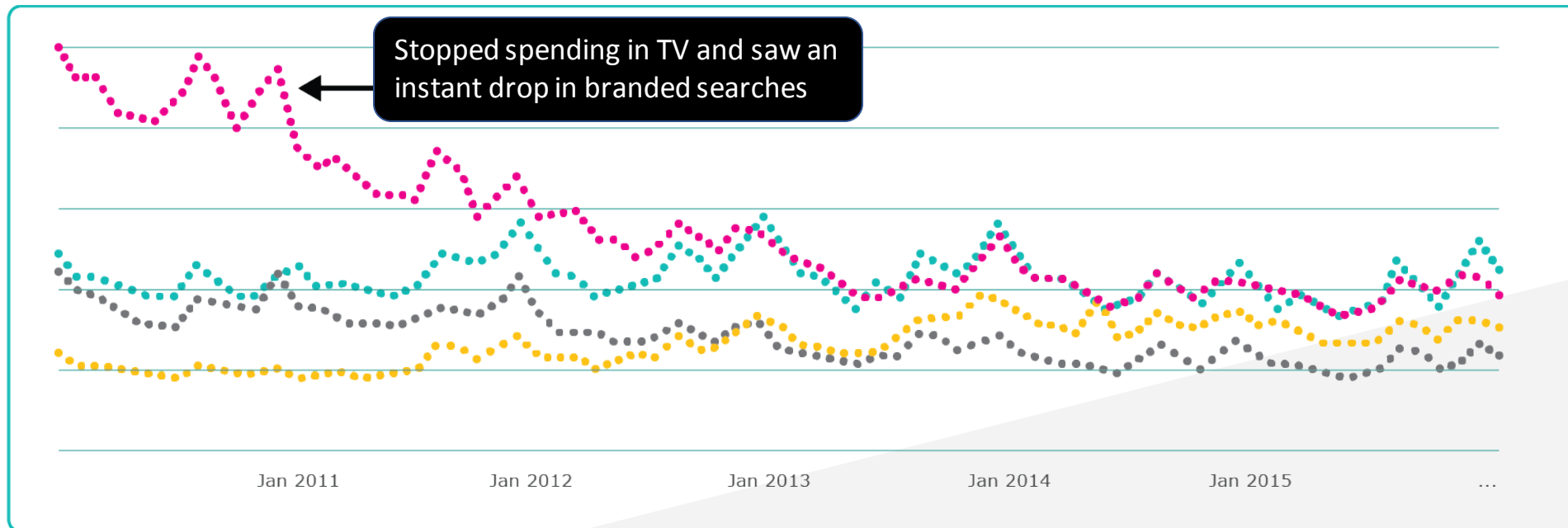
Companies  
Include:

amazon EBATES.ca Go Daddy indeed kijiji Uber SKIP THE DISHES wayfair

think **tv**

# tv and digital are interdependent

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



# online retailer **Wayfair** used **think tv** to drive their business to the next level

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“

The Wayfair brand is only a little over six years old and we've been able to build it as a household brand very quickly over just the last few years. Without using television, I don't think we would be where we are today.

- Niraj Shah, Co-Founder & CEO Wayfair

“

You can really connect emotionally with your customers and its been interesting to see how TV has helped us build a richness with our brand.

- Steve Conine, Co-Founder & Co-Chairman, Wayfair

**think**<sup>tv</sup>



# demand creation

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**tv ads** drive consumer action

# **tv** works throughout the funnel

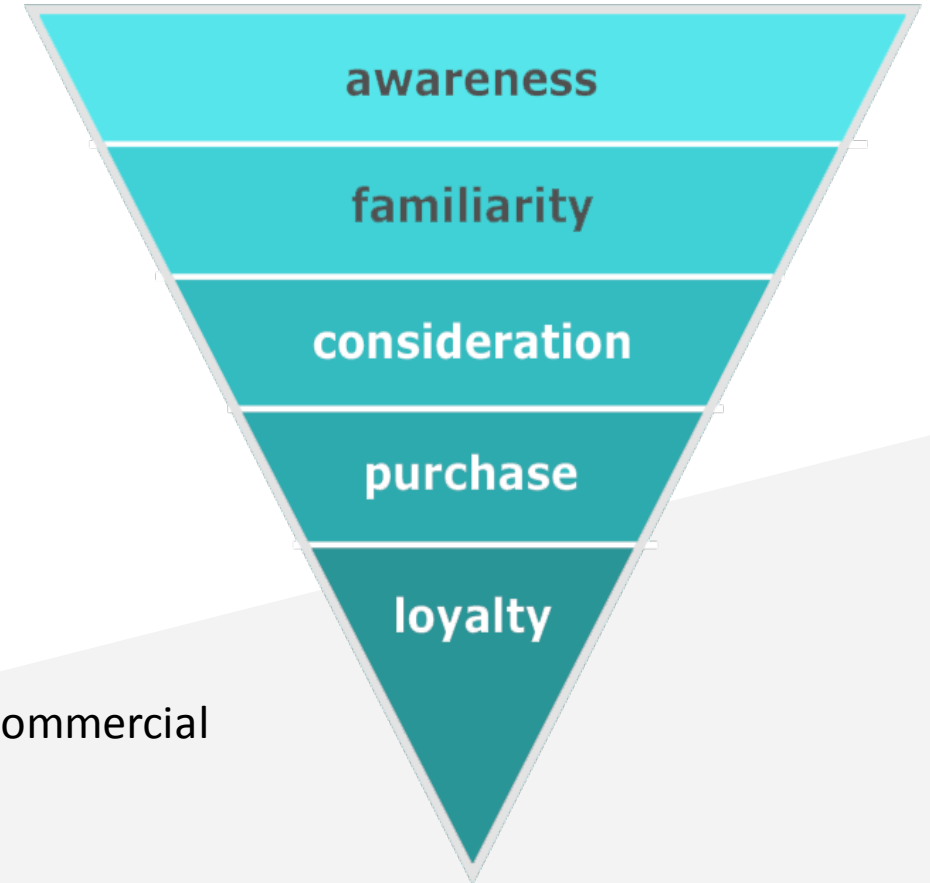
## TV is your best store-front window


### Top of the Funnel

- Awareness
- Brand building
- Interest / purchase intent

### Bottom of the Funnel

- Activation via sales promotions messages
- TV ads drive website visits
- Thanks to digital, you can literally buy online *while* watching the TV commercial





**“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

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

29 companies increased spend by **less than 30%**



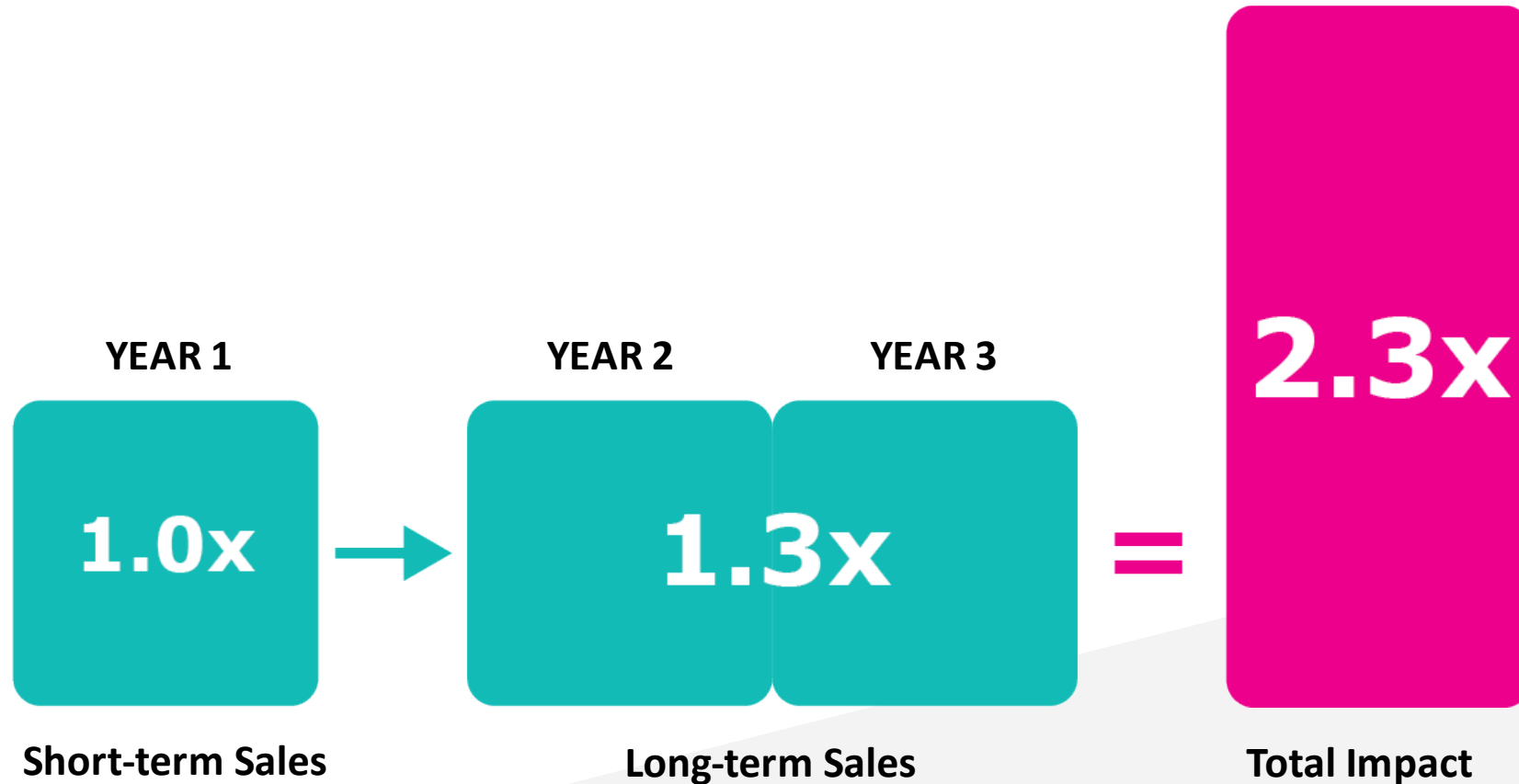
only increase in revenue

21 companies increased spend by **over 30%**



increase in revenue

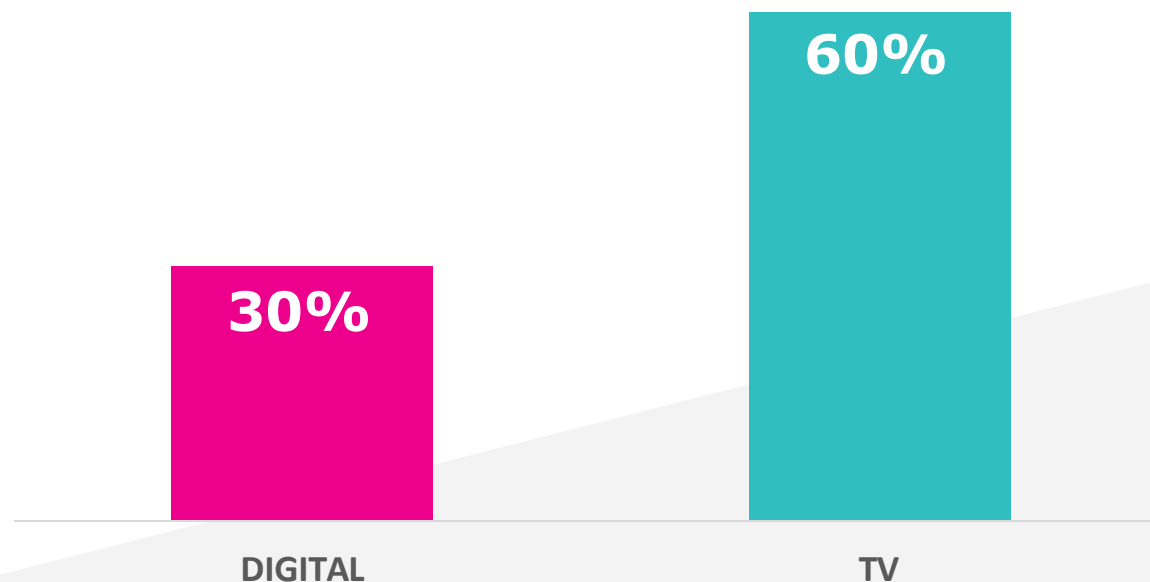
# spend in year 1 delivers brand awareness benefits in year 2 and 3



# “**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



# efficiency

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TV is the most efficient channel in both the short & long term

# 'Profit Ability': the business case for advertising

[an excerpt]



ebiquity

GAIN  
THEORY

thinkbox



# 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

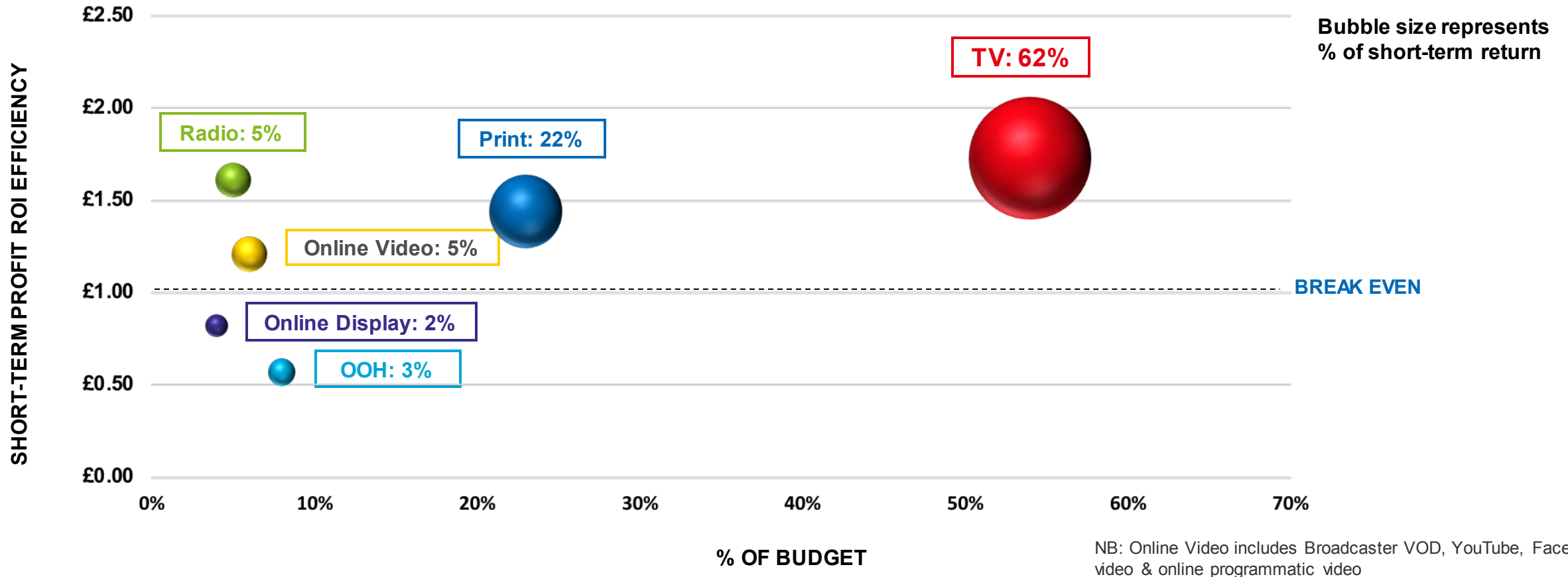
Television

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



# Total advertising performance – Long-Term Profit Return

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

## Long-Term Profit Return (up to 3 yrs)

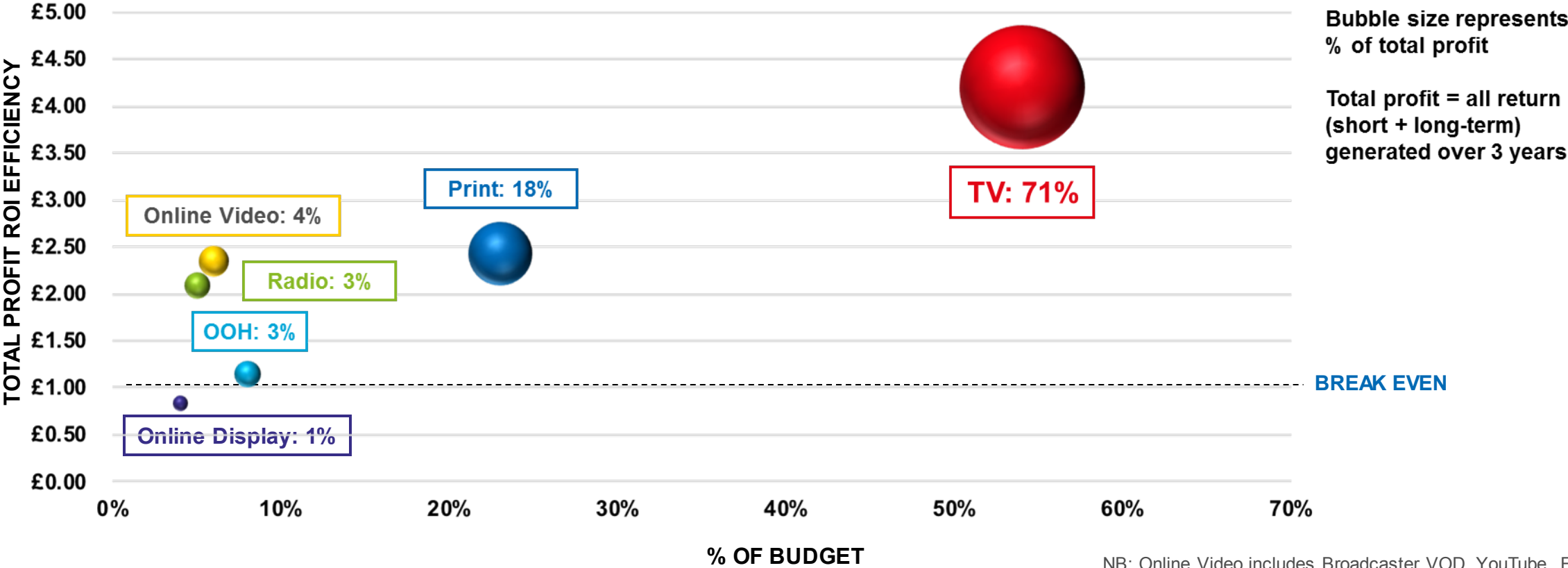
All media

**£3.24**

Television

**£4.20**

# TV's contribution to Profit ROI grows to 71% in the long-term, over-indexing substantially compared to investment



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

Source: 'Profit Ability: the business case for advertising', Nov 2017  
Ebiquty ROI campaign database (Feb'14-May'17) & Gain Theory. Campaign obs: 1,954





**“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.

accenture<sup>></sup>strategy

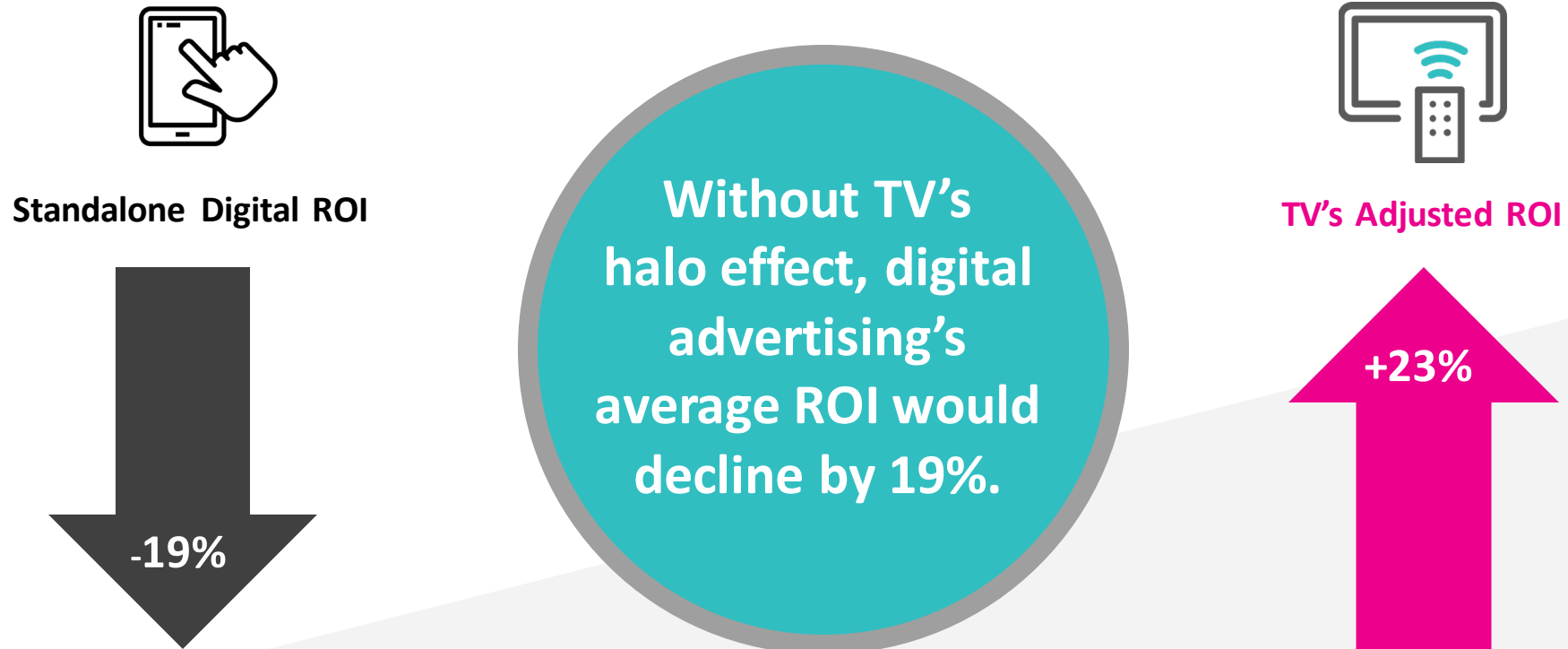
# THE MONEYBALL MOMENT FOR MARKETING IN CANADA

Advertising Effectiveness  
In a Multi-Channel World

Commissioned by think<sup>tv</sup>

# tv improves digital's performance

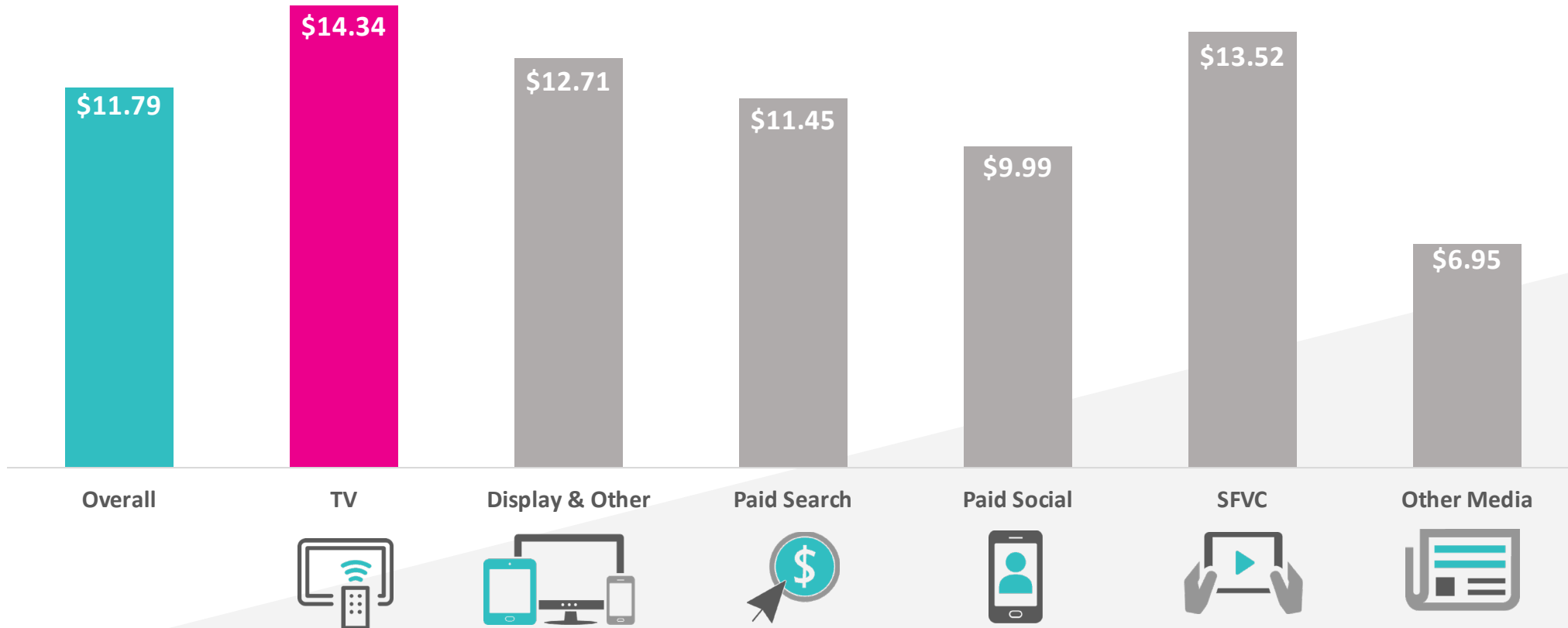
TV has a significant halo effect on digital media, increasing its sales ROI by 19%



# tv delivers the best ROI

driving \$14.34 in return for every dollar spent

ATTRIBUTED SALES ROI BY MEDIA CHANNEL

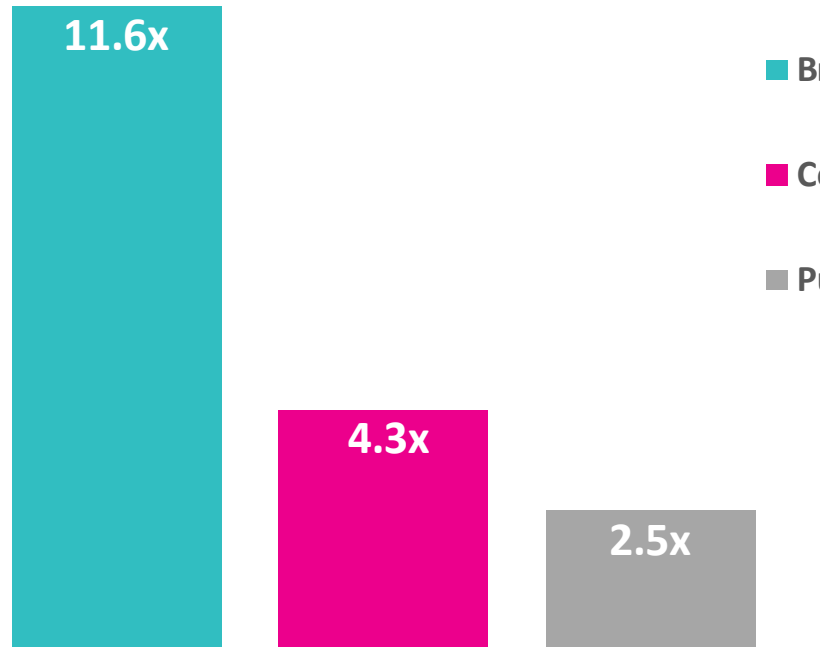


think<sup>tv</sup>

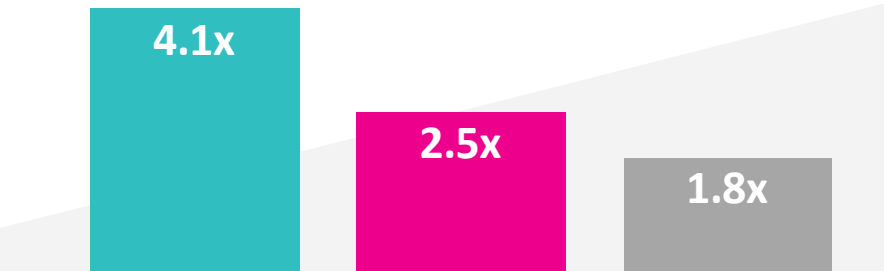


# premium video delivers higher brand ROI

VS SHORTFORM VIDEO



VS PAID SOCIAL



- Brand Awareness
- Consideration
- Purchase Intent

Premium Video =  
Linear TV + Premium  
Digital Video



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# EFFECTIVENESS IN/CONTEXT

A MANUAL FOR **BRAND-BUILDING**

**NOV 2018**

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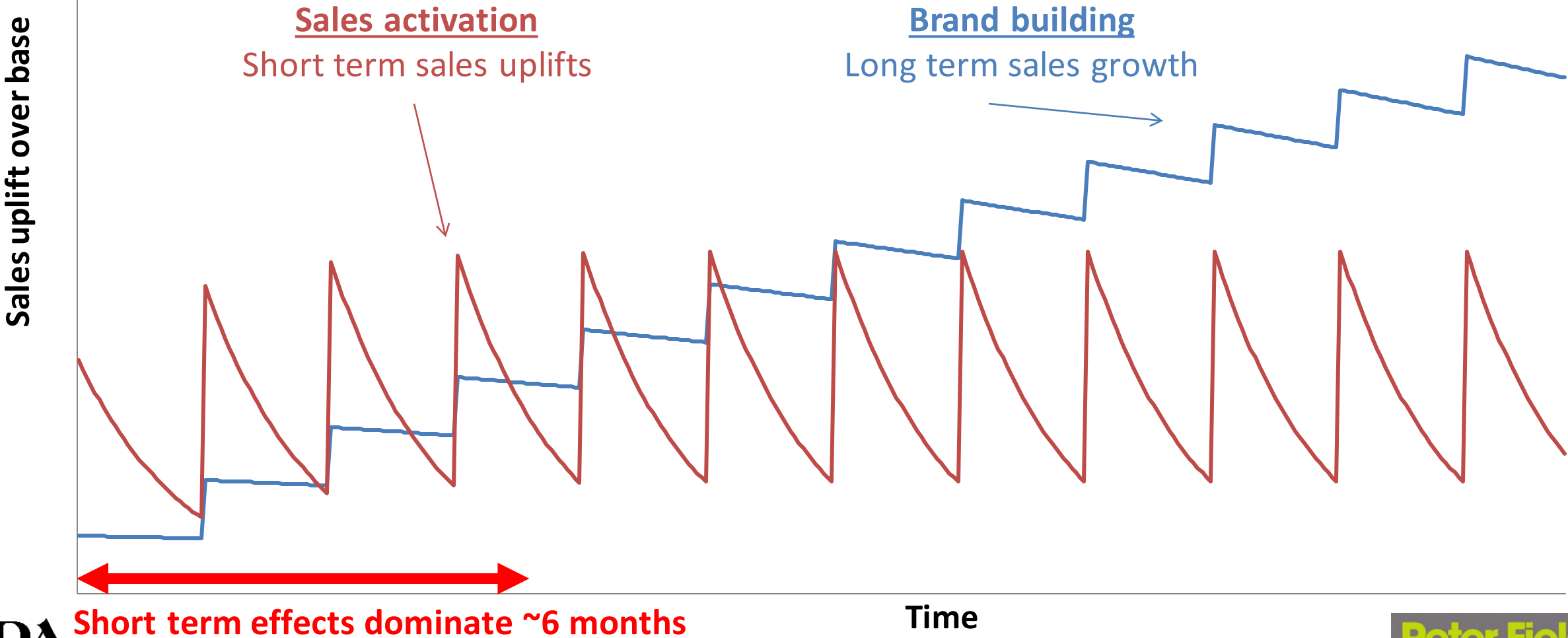
[an excerpt]



In association with

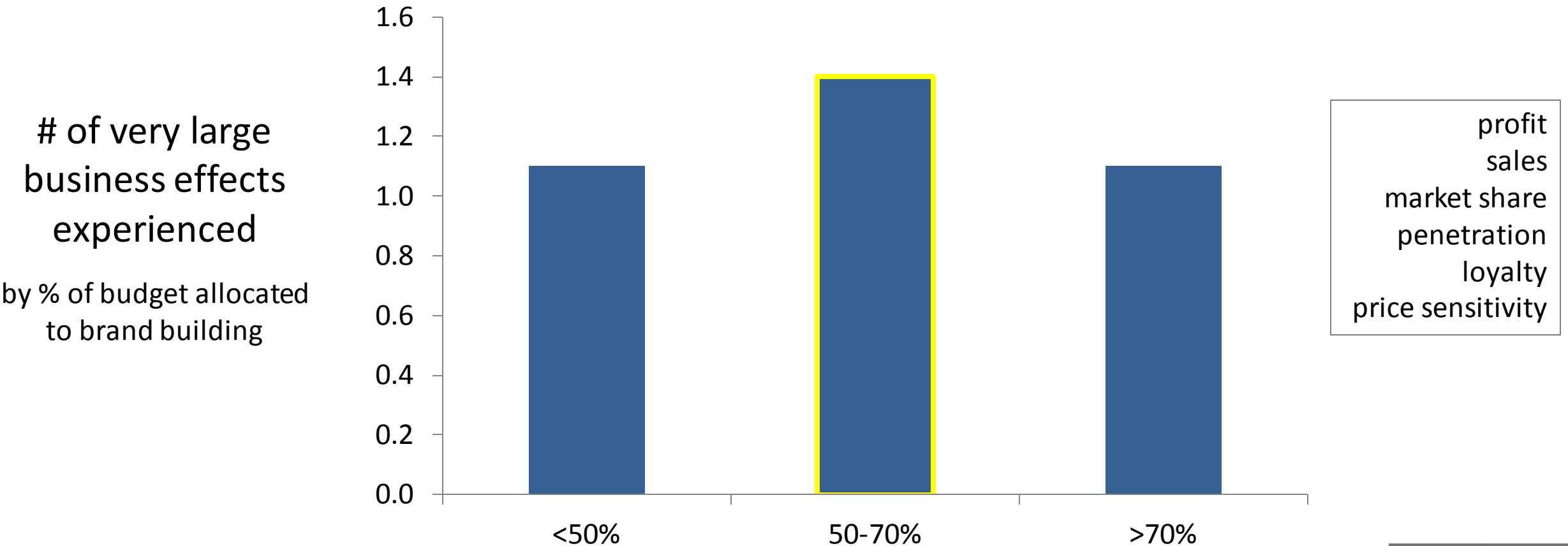


# Two ways marketing works

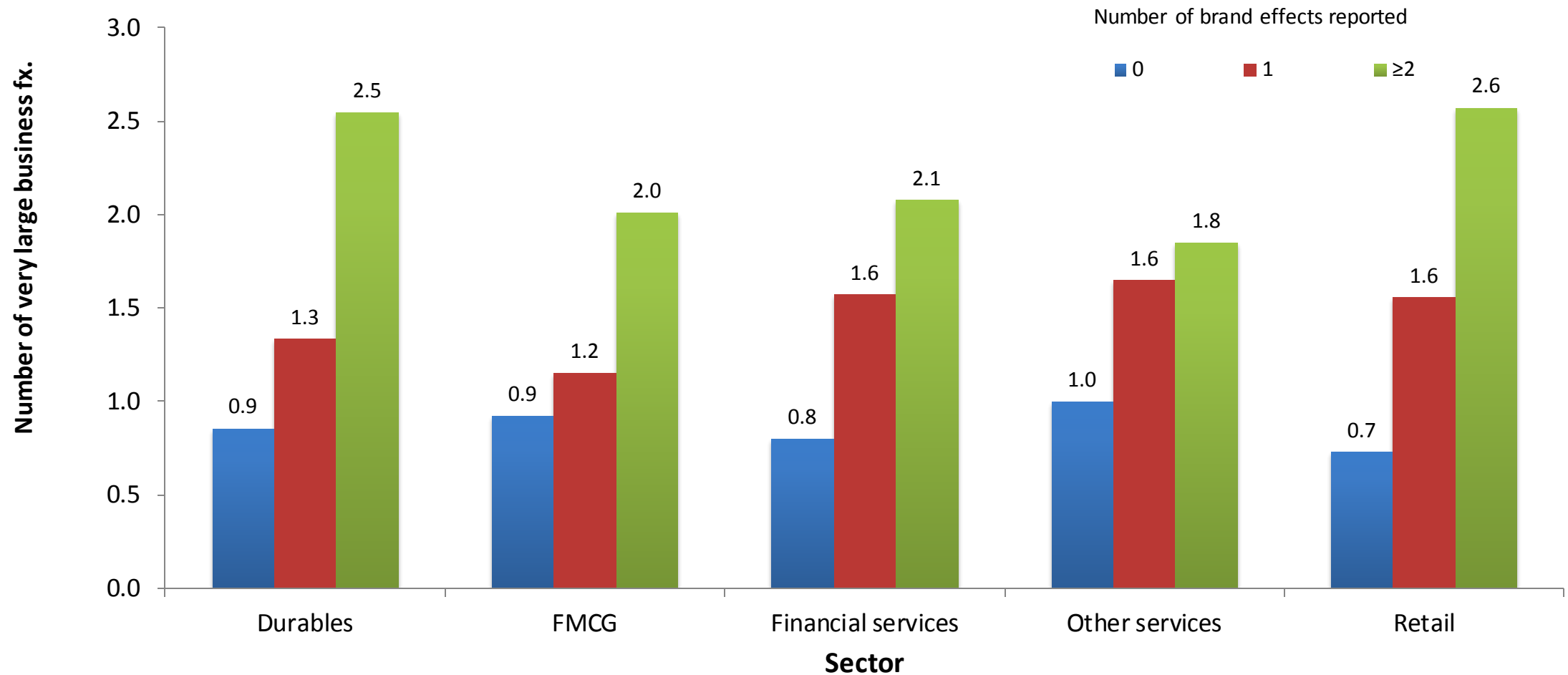


# “the 60:40 rule”

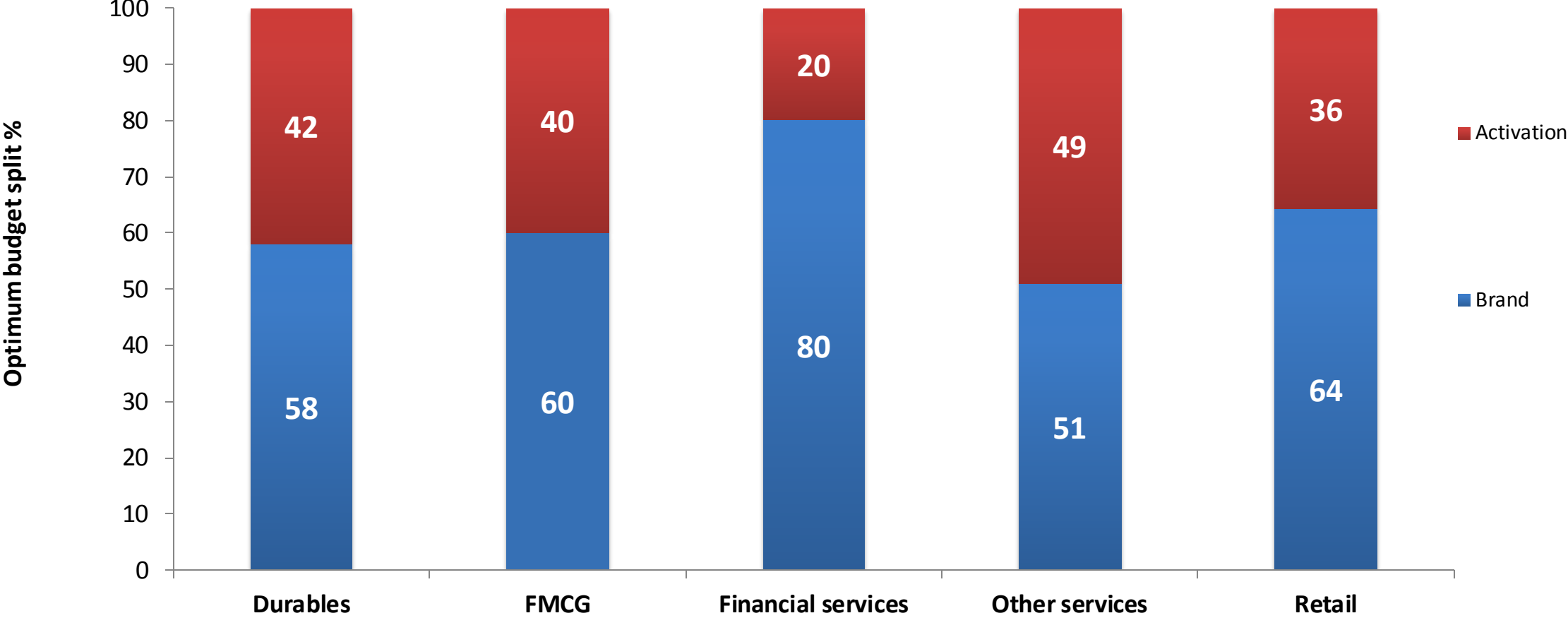
## getting the brand-building : activation balance right



# Brand building always drives long-term effectiveness



# Up-weight brand in Financial Services, down-weight brand in Other Services



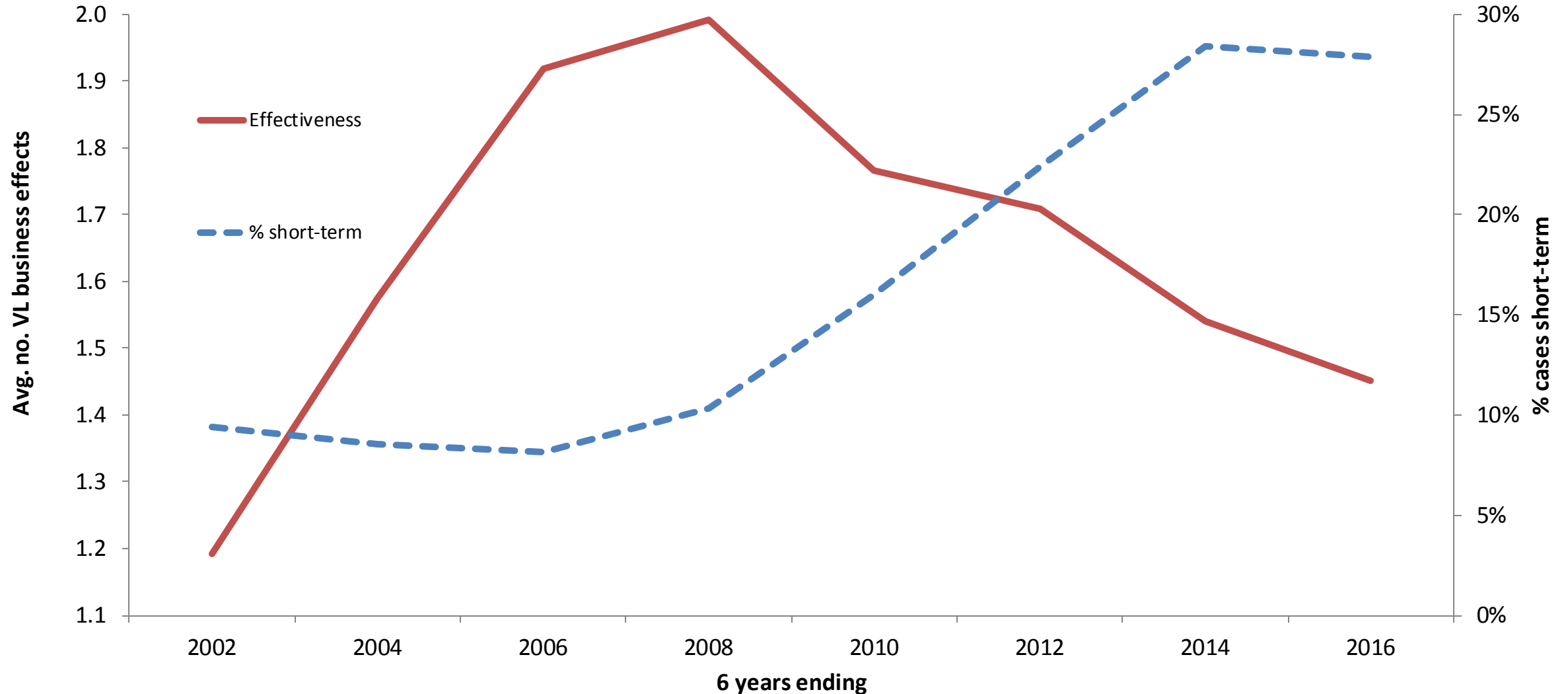
Source: IPADatabank, 1998-2016 for-profit cases





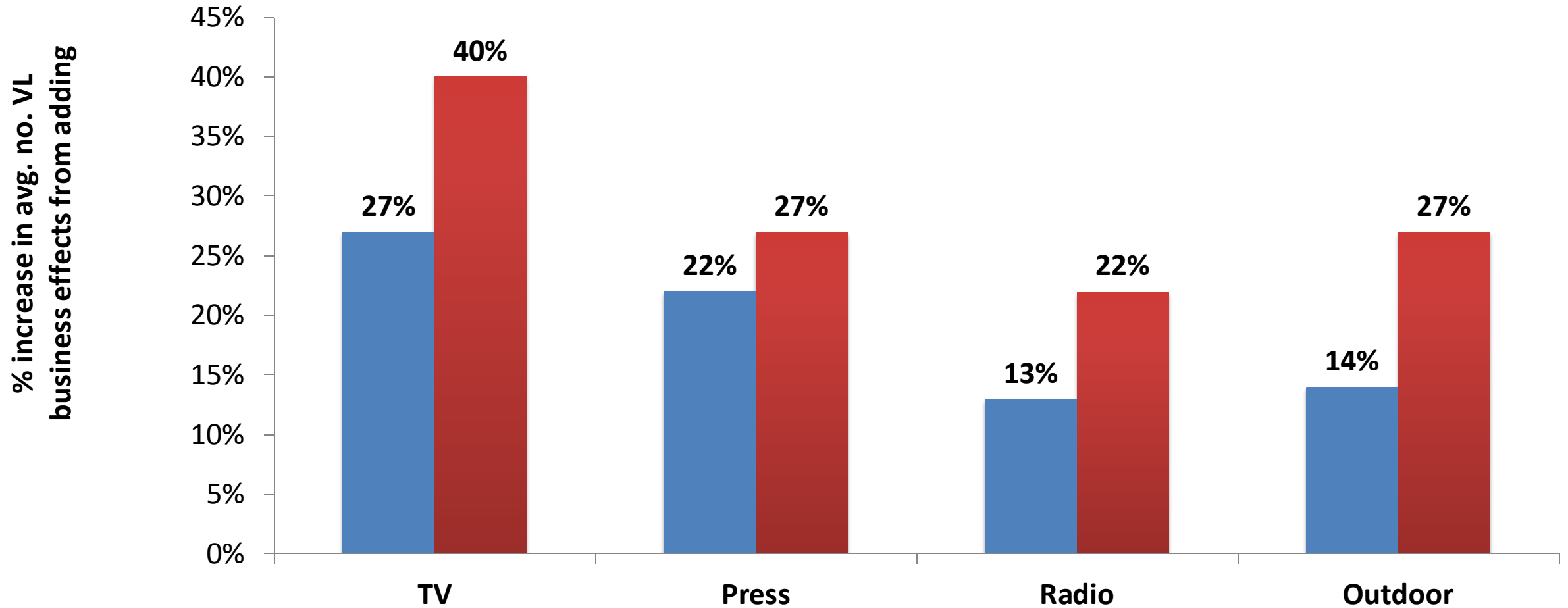
**the danger of short-termism**

# short-termism has increased; effectiveness has fallen





# Established brand media are working harder



# **tv** 's top attributes



**High completion rates**



**Robust measurement**



**Full Screen**



**Brand safe**



**Sound on**



**Shared viewing**



**Viewed by humans**



**High quality programming**

# **tv**'s winning formula

- 1** TV dominates time spent with media
- 2** TV ads produce the biggest impact
- 3** TV improves the performance of online advertising
- 4** TV works @ both ends of the funnel
- 5** TV delivers the strongest ROI of all media

# today's **tv**



**100% of TV channels  
delivered digitally**



**explosion in viewing  
options**



**advances in addressable  
advertising & measurement**

# in case you missed it

check out these additional [research reports](#)

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## Canadian media attribution study

The think**tv**-commissioned research assessed \$700M+ of media spend in Canada, covering 105 brands across four verticals. It clearly underscores the ways different advertising channels impact sales, how that varies by industry, and how TV and digital work together.

[learn more »](#)

## effectiveness in context

Peter Field's latest report explores the damage being done as companies increasingly cut long-term brand investment in favour of short-term sales activation, and highlights how the "60/40 rule" changes depending on the context.

[learn more »](#)

## online businesses on tv

Digital companies continue to invest heavily in TV advertising. TV spend by internet-related companies is up 30% from last year.

[learn more »](#)

## profit ability: the business case for advertising

"Profit Ability" is a study that analyses over 2,000 advertising campaigns across 11 categories to uncover the impact that different forms of advertising have on both short-term profit, and the long-term, to determine advertising's total contribution to the bottom line.

[learn more »](#)

## culture, brains & ads that speak to us

How do subtle factors like our values, differing media environments and cultural foundations influence how we watch content?

[learn more »](#)

## ad nation

Ipsos examines the media habits of advertising professionals to show how their media and tech savvy behaviour are skewing their perceptions of average Canadians.

[learn more »](#)

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



Contact us today for a  
**PRESENTATION**



[info@thinktv.ca](mailto:info@thinktv.ca)



[Sign up for our  
newsletter](#)

**think**<sup>tv</sup>

# Sources

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- Slides 2, 3:** Numeris PPM, Total Canada, Total TV, Consolidated, All Locations, Ind. 2+, M-Su 2a-2a, Fall-Win-Spr 2018-2019 (Weeks 3-39, September 10, 2018 to May 26, 2019)
- Slide 4:** Based on 900 (6 weeks x150 GRPs) GRP campaign, Total Canada, Ind. 2+, Numeris 2018-19 population estimates.
- Slide 6,7,8,10:** Television: Numeris PPM, Total Canada, Total TV, Consolidated, All Locations, Mo-Su 2a-2a, A18+, Fall-Win-Spr 2018-2019 (Weeks 3-39, September 10, 2018 to May 26, 2019) | Internet (Daily Reach), Radio, Daily Newspaper, Magazine: Numeris RTS, Canada, average Fall 2018/Spring 2019 | Internet (Weekly Hours): comScore Media Metrix; Multi-Platform; Sep 2018 to May 2019 (Note: Numeris population estimates used to calculate average weekly hours per capita).
- Slide 9:** Mediastats, BDU Profile, Canada. CTAM Canada
- Slide 12:** Nielsen Total Ad Ratings campaigns, October 2016 through December 2018
- Slide 15:** Ipsos Media TIPs Study, August 2018
- Slides 16, 17:** thinktv, nlogic, omniVu, National, March 2018 (Don't Know/Refuse not included).
- Slides 18, 19:** thinktv, nlogic, omniVu, National, June 2017 (Don't Know/Refuse not included).
- Slide 20:** thinktv, nlogic, omniVu, National, April 2019 (Don't Know/Refuse not included).
- Slide 21:** GroupM Canada, 2016; Marketing Mix models across Consumer Electronics, Retail, Finance, Auto and CPG; Target the (Whole) Market
- Slide 22:** Numerator, Canada, Internet Related Sites and Services Category. For full list of companies contact thinktv.
- Slide 23:** Google trends, April 2016, MediaCom; "Missed Opportunities in Media Planning" whitepaper
- Slide 28:** MediaCom; "Missed Opportunities in Media Planning" whitepaper; Stats from Nielsen, April 2016. Public financial statements.

# Sources

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- Slide 29:** Accenture Strategy, ABC; Cross-channel advertising attribution; New insights into multi-platform TV, May 2016
- Slide 33-36:** 'Profit Ability: the business case for advertising', November 2017 Ebiqity ROI campaign database (Jan'08-May'17) - Campaign obs: 6000 / Feb'14-May'17 - Campaign obs: 1954
- Slide 39, 40:** thinktv, Accenture, Leveraging TV to Drive Improved Media Spend Performance, 2019
- Slide 41:** Accenture, NBC Universal; Quantifying the Connection: Premium Video + Brand Building – 2017
- Slide 43-49:** 'Effectiveness in context: A manual for brand-building' Binet & Field, (November 2018) / IPA Databank