

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

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

the ubiquity of **tv**:



**tv reaches**  
**28,126,000**  
**Canadians every day**

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

**121**  
**million**  
hours

**time spent  
with tv yesterday**

**90%**  
of  
**Canadians**

**tv's weekly  
reach**

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

the average **tv** campaign delivers

**331** million impressions



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

**tv is powerful because it delivers:**

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➤ **reach**

➤ **demand  
creation**

➤ **impact**

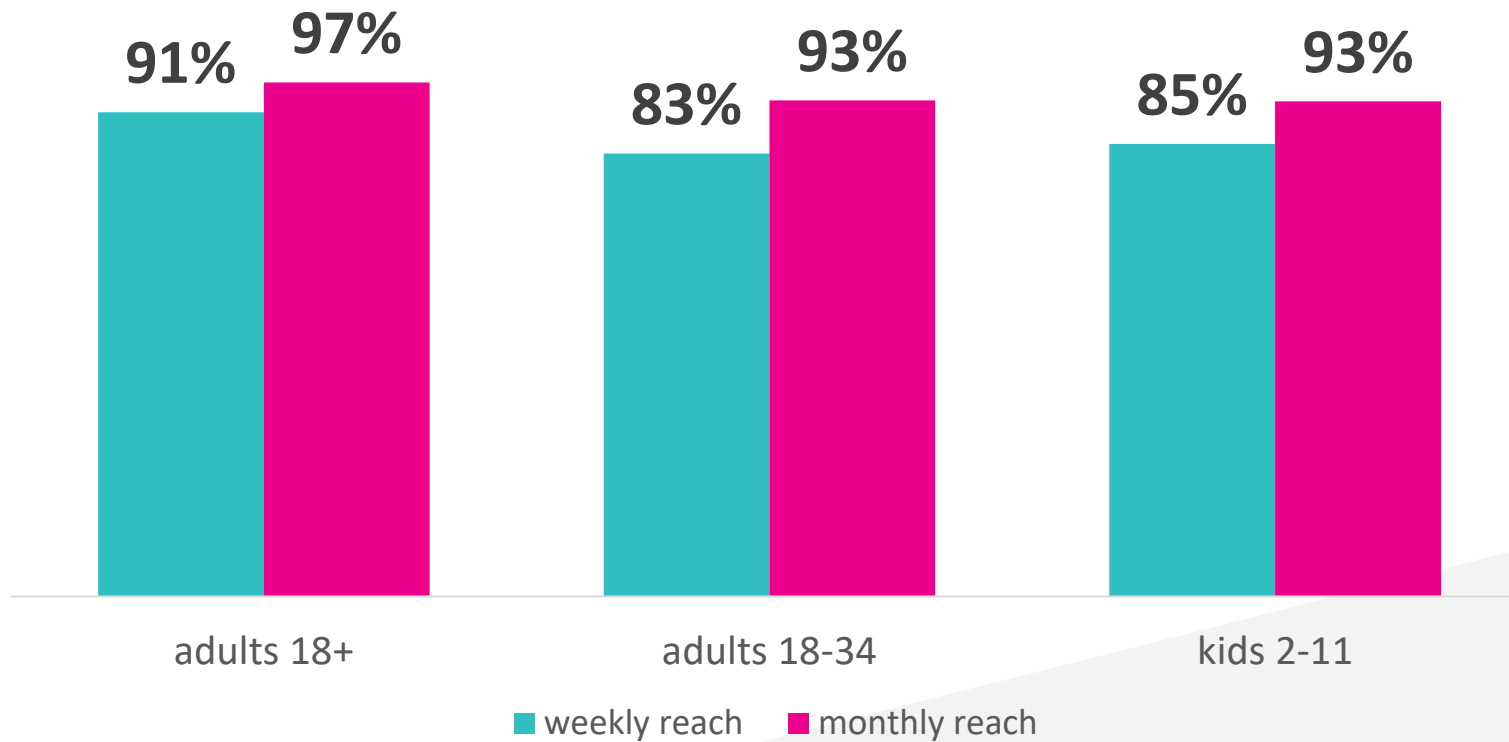
➤ **efficiency**

# reach

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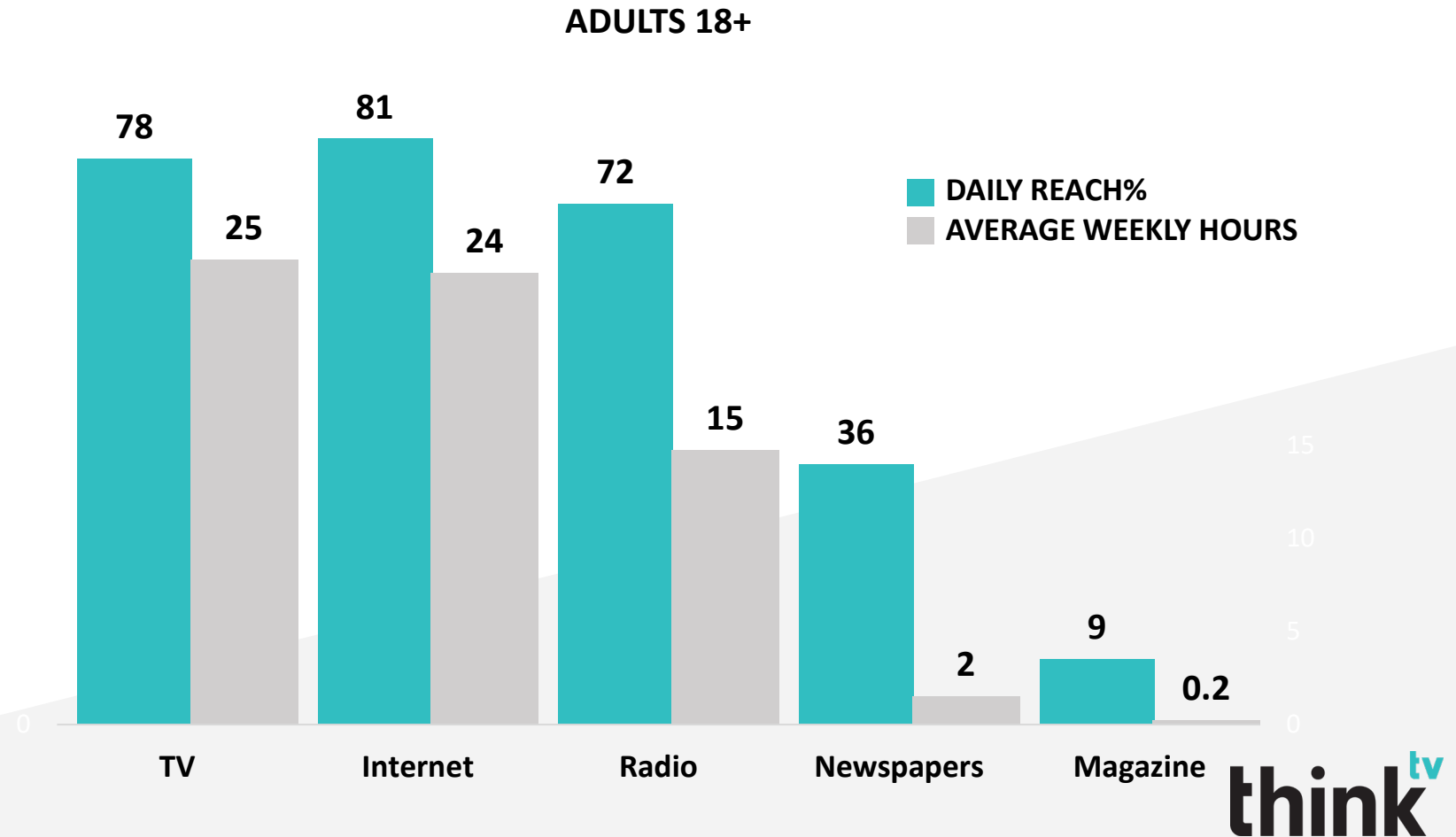
**33.5 million** Canadians every week

# **tv** reaches **90%** of Canadians **every week**





**tv** reaches **78%** of Canadian adults **daily**  
and **91% weekly**



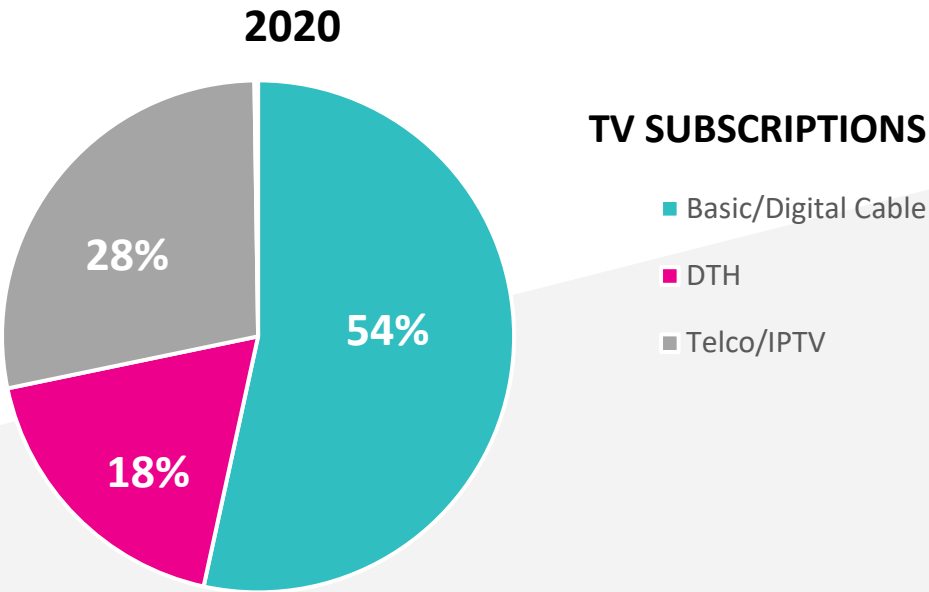


# over 10.5 million Canadian HH's have a paid TV subscription

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 2%.

The notion that “no millennials subscribe to TV” is also false: 62% 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 83% of A18-34 on a weekly basis).

	Jan '20	Jan '19	% Change
Total Subscribers	10,548,341	10,718,292	-2.0
Basic/Digital Cable	5,634,299	5,824,709	-3.3
DTH	1,933,180	2,074,493	-6.9
TELCO/IPTV	2,956,769	2,795,052	+5.8
Other	24,093	24,038	0.0

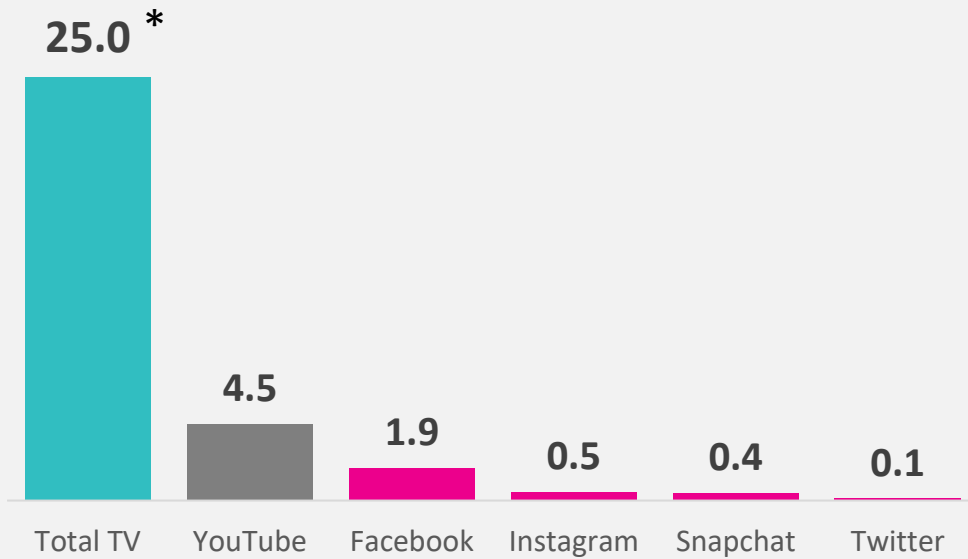




# dominates time spent

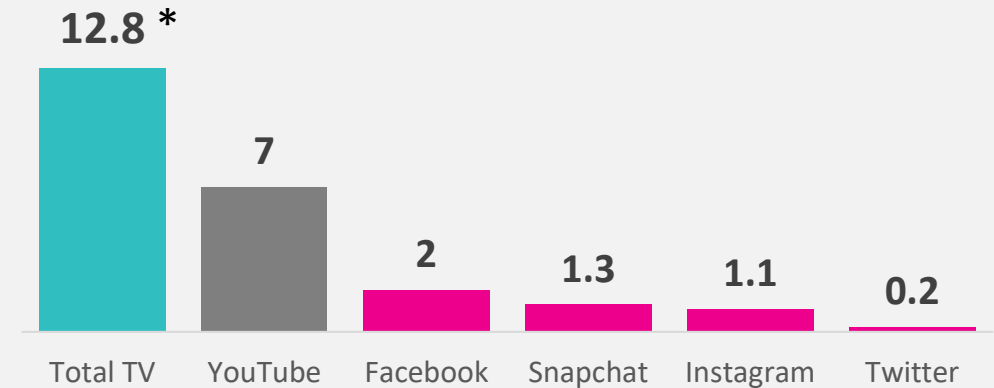
## AVERAGE WEEKLY HOURS

### ADULTS 18+



\* 88% of A18+ TV viewing is LIVE

### ADULTS 18-34



\* 87% of A18-34 TV viewing is LIVE



**“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

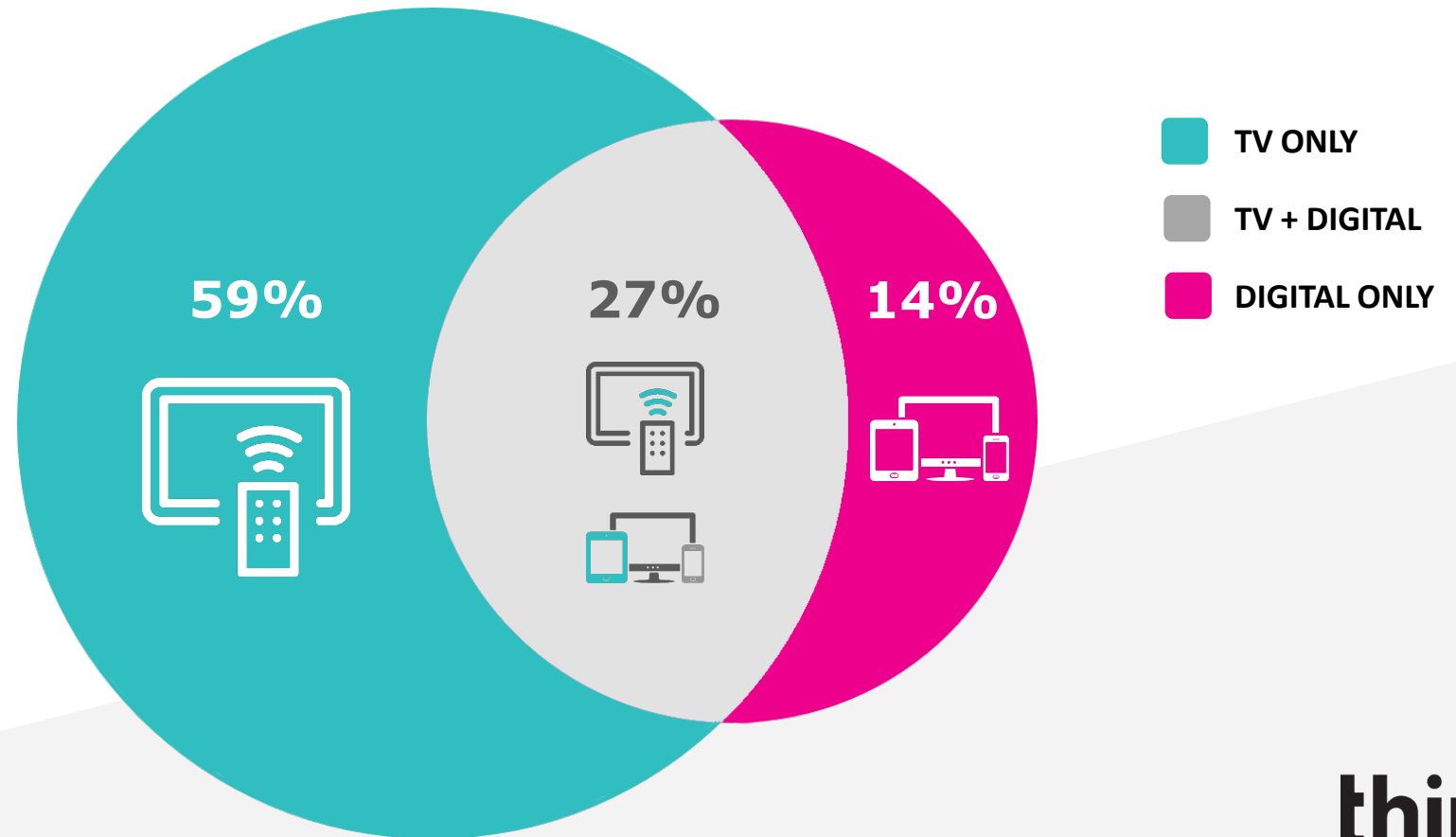
Professor of Marketing Science, University of South Australia

# 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."**

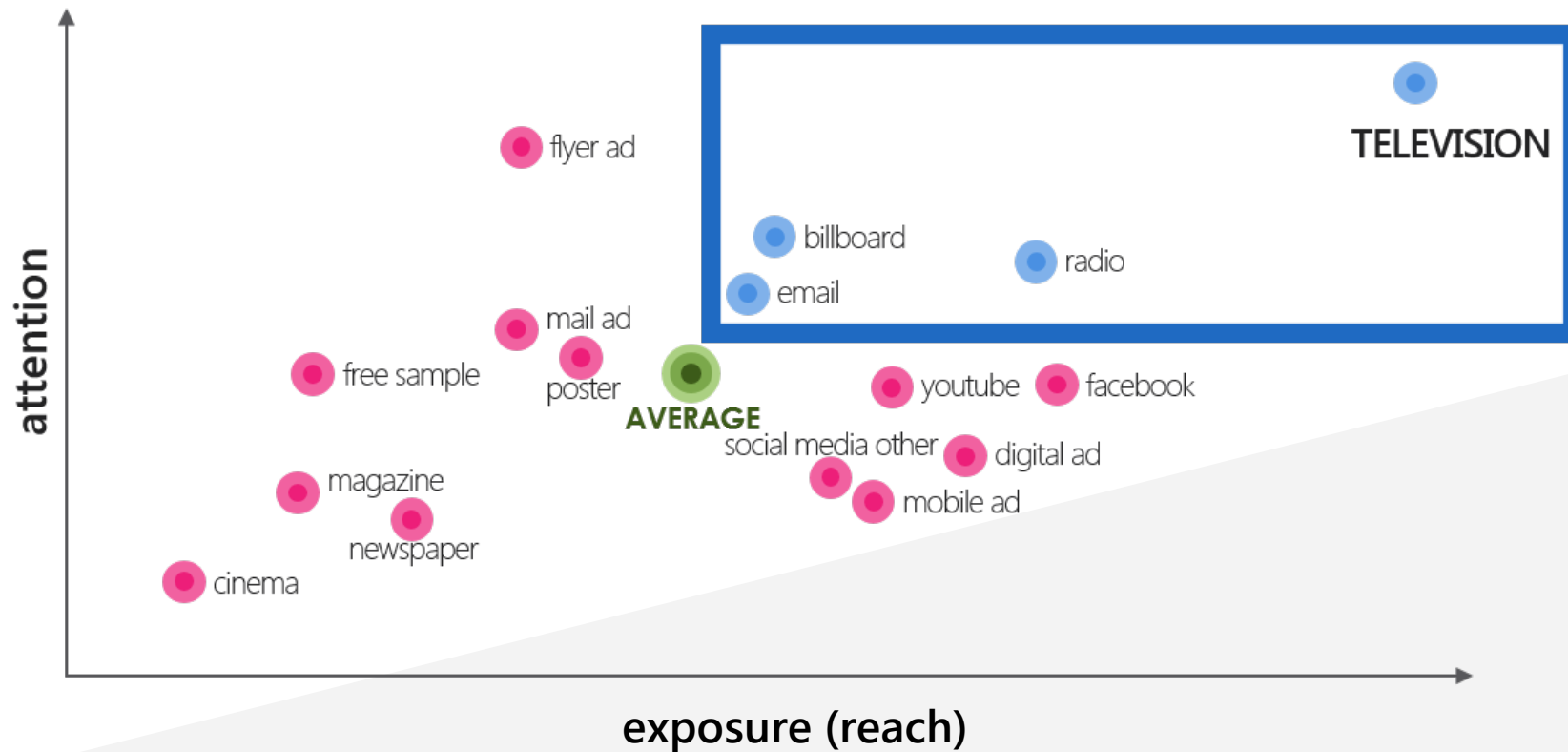
*Leo Burnett*



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

Each medium delivers some combination of reach (exposure) and consumer attention.

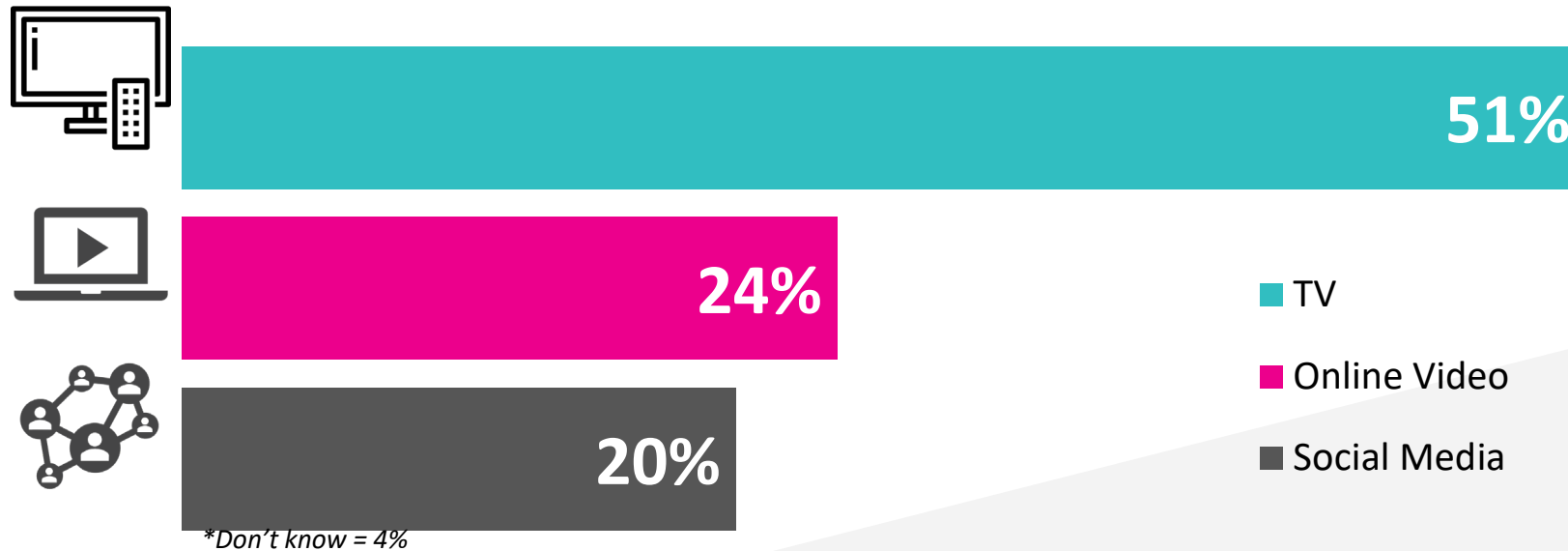
TV delivers the **highest exposure** through its mass reach AND it captures the **greatest consumer attention**.



think<sup>tv</sup>

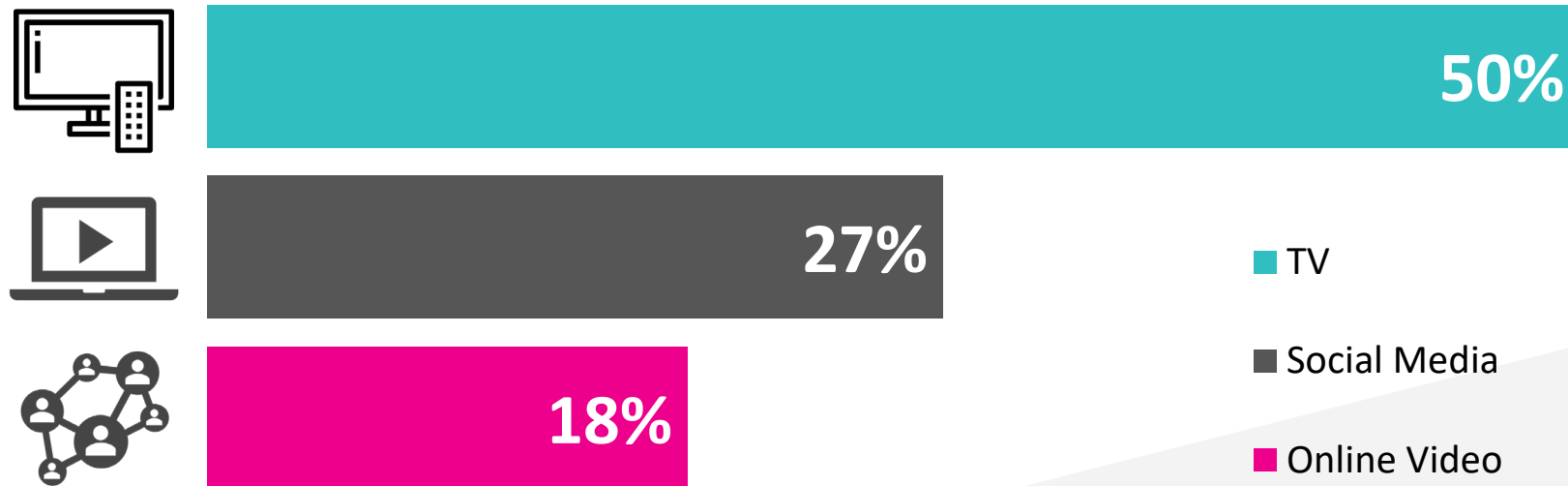
# Canadians pay **most attention** to ads on **tv**

Q. Which one of the following media carries video advertising that best captures your attention?



# tv ads are the most influential

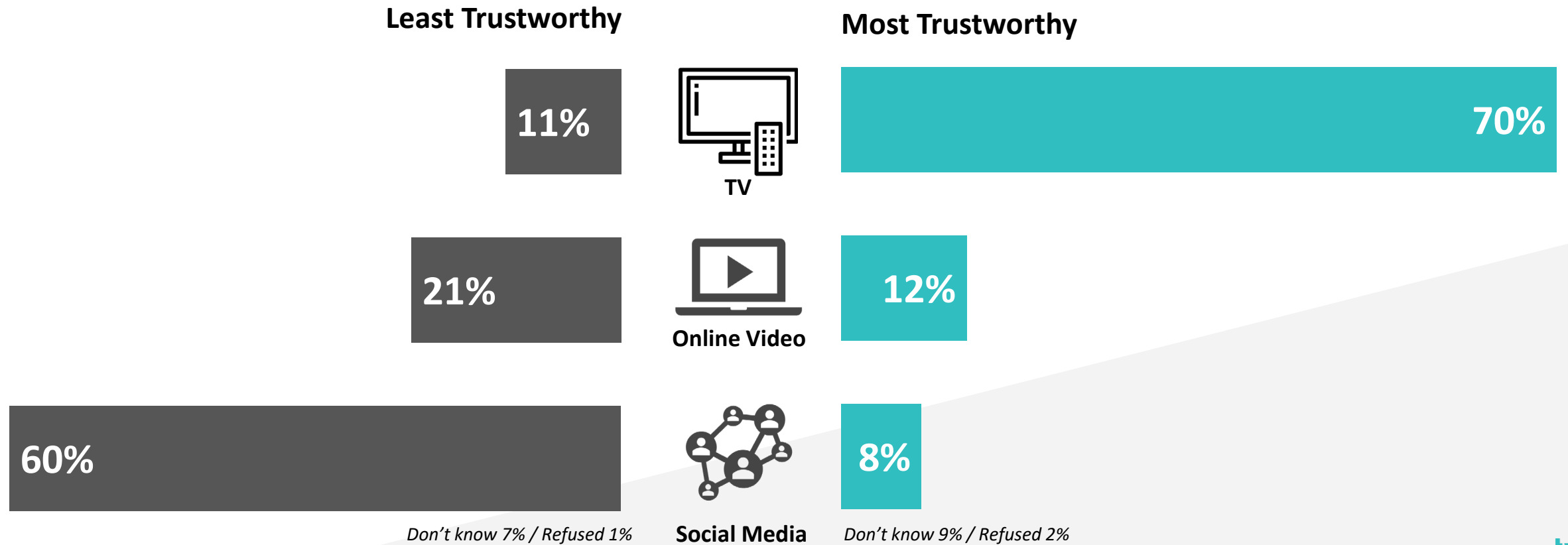
Q. Which one of the following media carries video advertising that you believe to be the most influential?



\*Don't know = 5%

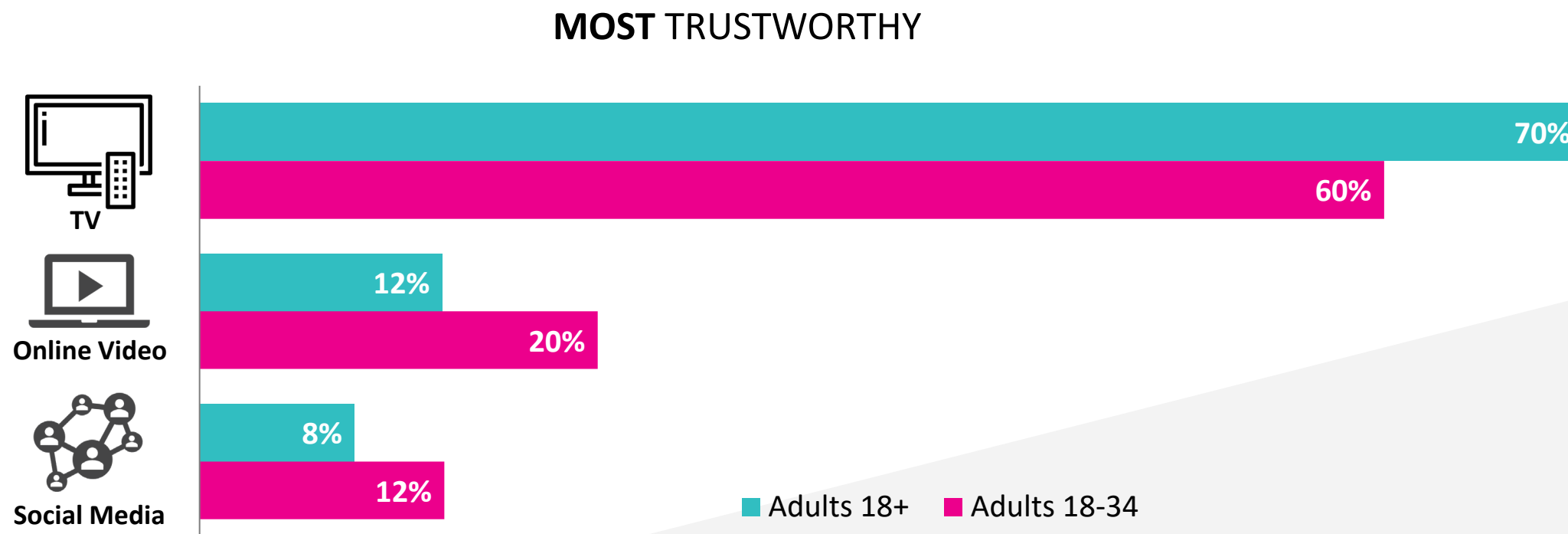
# tv is also the **most trusted** medium

Q. Which one of the following media carries video advertising that you believe to be most trustworthy? Least trustworthy?



# tv is most trusted across all demos

Q. Which one of the following media carries video advertising that you believe to be most trustworthy?

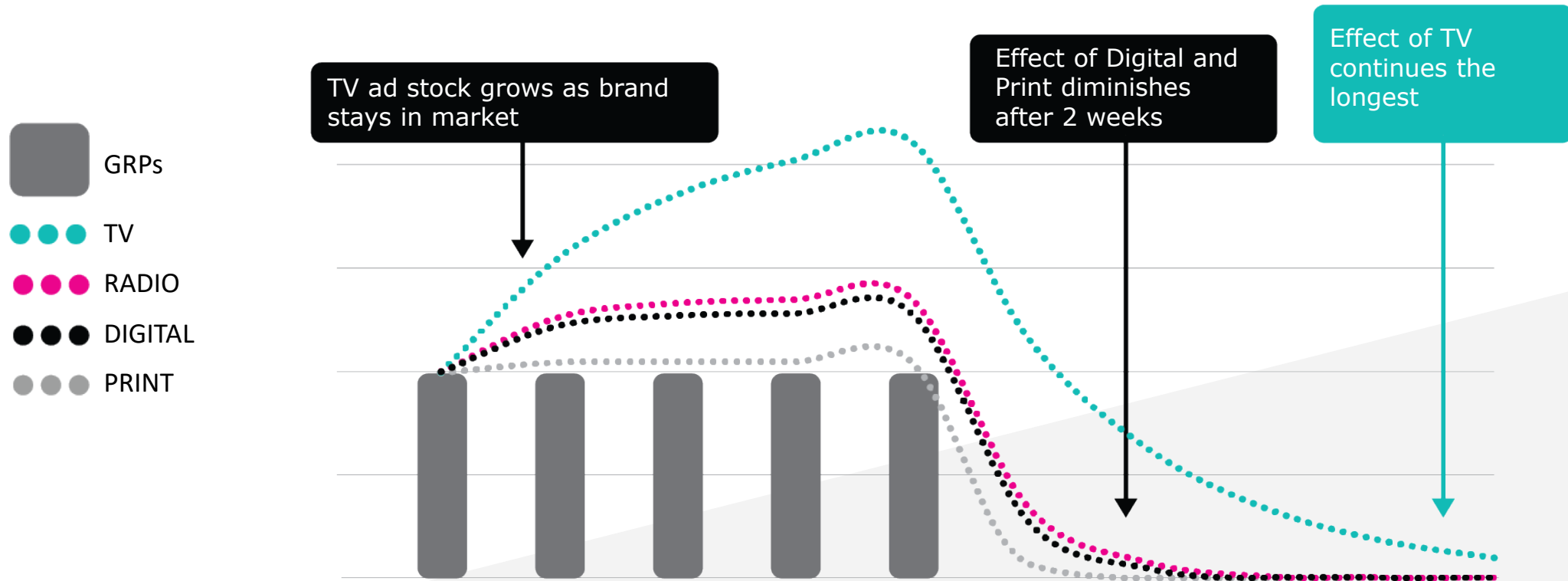


Don't know/ Refused 18+ 11% / 18-34 9%

think<sup>tv</sup>

# tv ads deliver the biggest impact

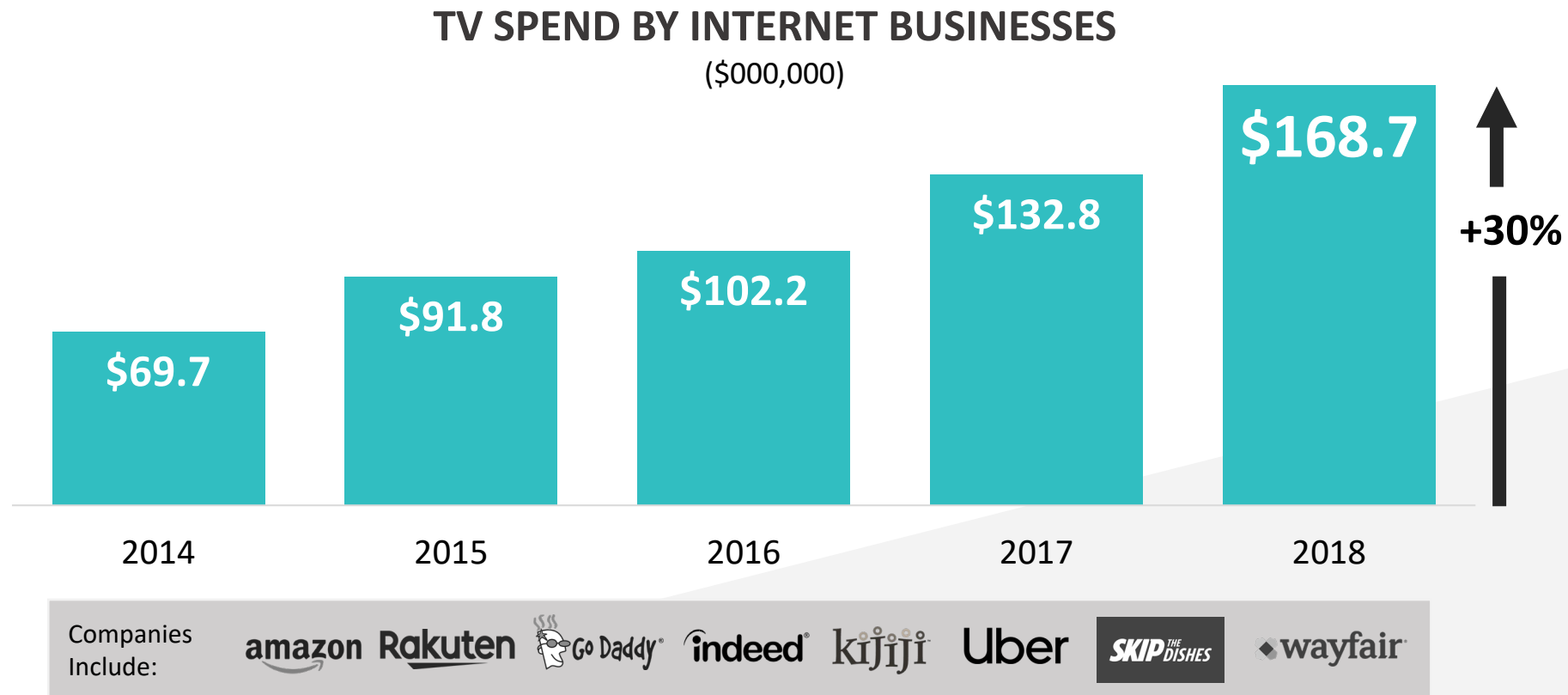
the adstock of a TV spot grows the fastest and lasts the longest





# digital companies know **tv** works!

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



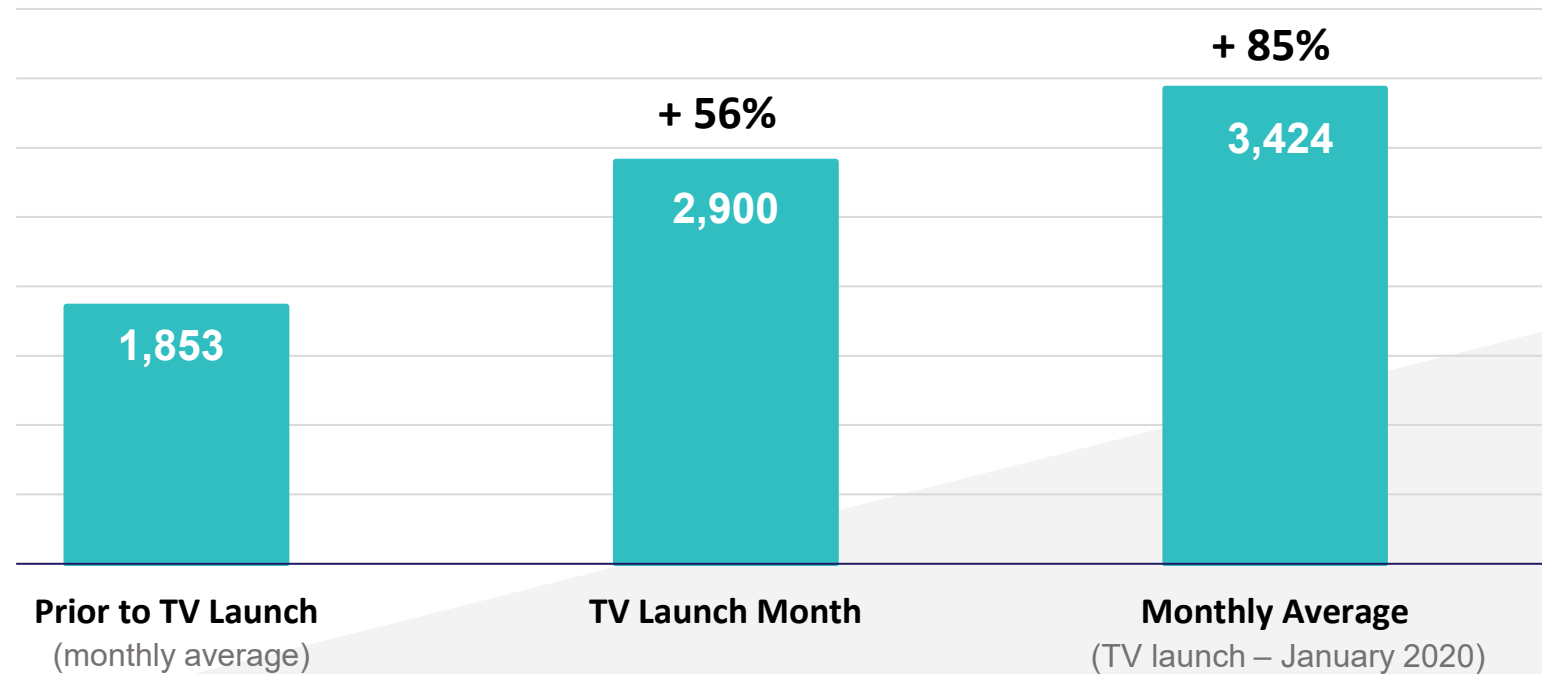
# tv and digital are interdependent

## 36 'Emerging' DTC Brands\*

Average Monthly Website Unique Visitors (000)

*Based Over a Four-Year Time Period: Jan '16 – Jan '20*

The VAB tracked 36 emerging DTC brands in the US and found **monthly unique visitors saw an immediate surge upon the launch of a TV campaign**, and this audience continued to grow through the duration of these brands' TV flight.



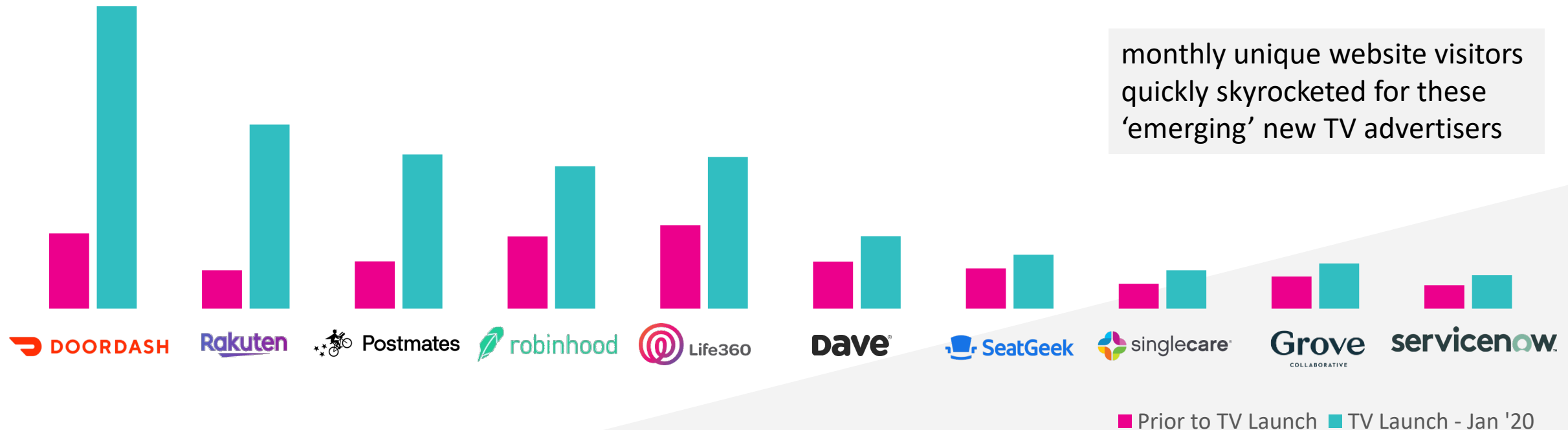
think<sup>tv</sup>

Source: VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Feb '18 – Jan '20 (calendar months). VAB analysis of Comscore mediametrix multiplatform media trend data, total audience (Desktop P2+, Mobile 18+), Jan '16 – Jan '20 (calendar months). 'Prior to TV Launch' reflects the average monthly unique visitors based on when each brand's website began being measured by Comscore, or starting from January 2016 if measurement began before that month. \*Reflects the 36 brands that are measured in Comscore and had reported monthly unique visitors in at least one month prior to their campaign launch.

# tv and digital are interdependent

## Monthly Website Unique Visitors (000) Comparison

Based Over a Four-Year Time Period: Jan '16 – Jan '20



think<sup>tv</sup>

Source: VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Feb '18 – Jan '20 (calendar months). VAB analysis of Comscore mediameitrix multiplatform media trend data, total audience (Desktop P2+, Mobile 18+), Jan '16 – Jan '20 (calendar months). 'Prior to TV Launch' reflects the average monthly unique visitors based on when each brand's website began being measured by Comscore, or starting from January 2016 if measurement began before that month.

# online retailer Wayfair used **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*

# demand creation

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**tv ads** drive consumer action

# **tv** works throughout the funnel

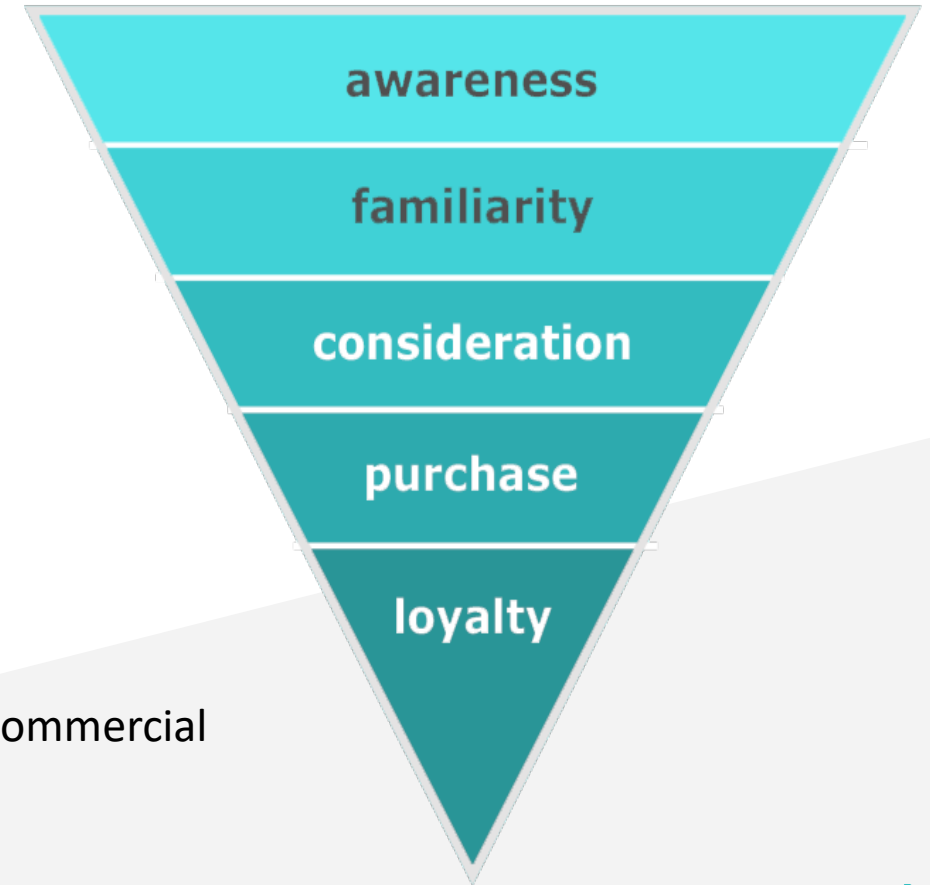
## TV is your best store-front window

### 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



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

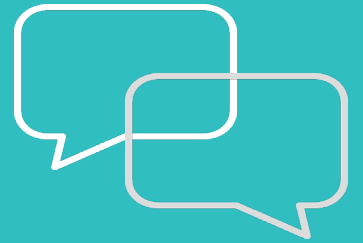


**“TV remains very important for us. It’s still a very, very important way for us to drive mass reach, and **the right reach** as well.**

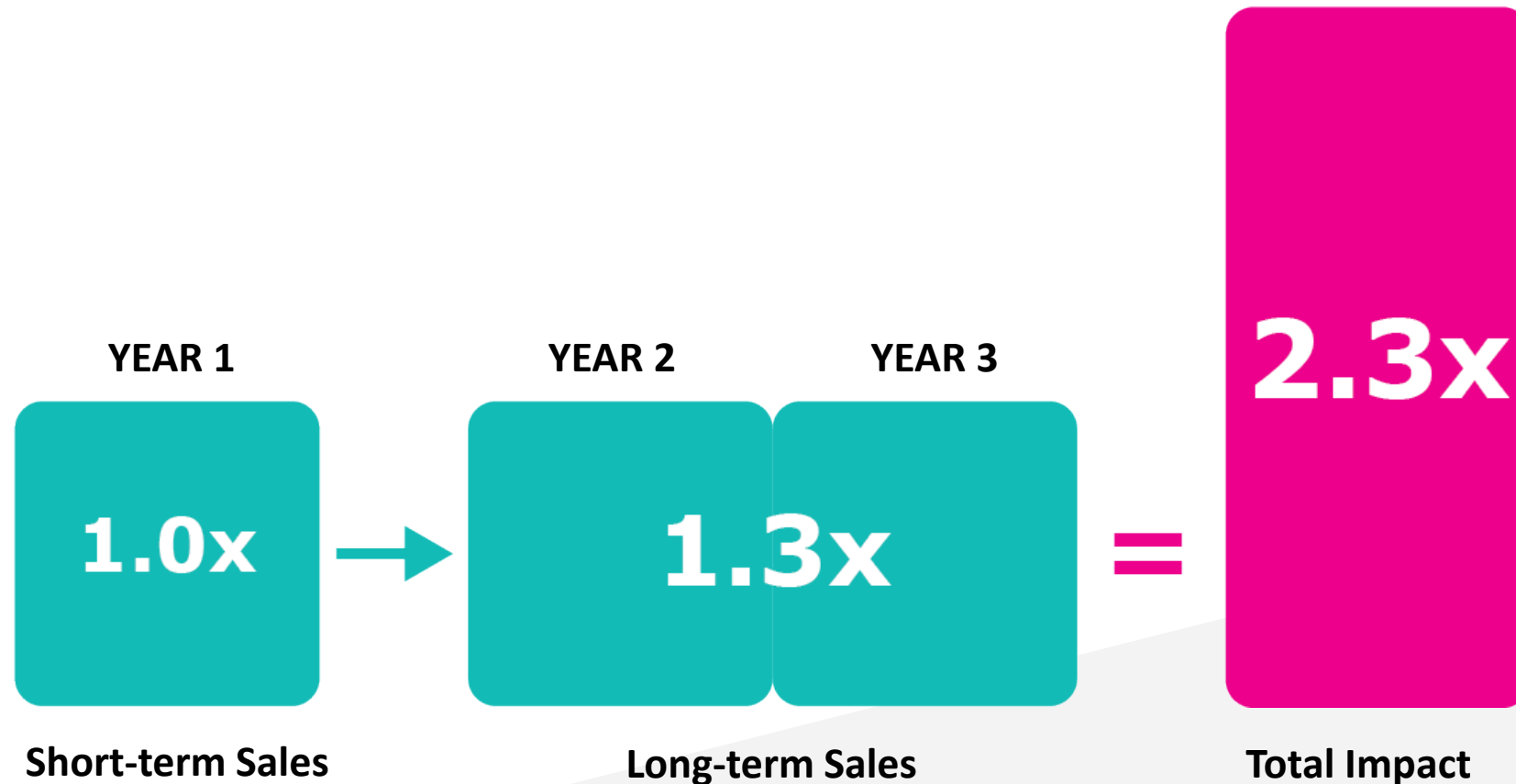
Andrew Clarke, CMO of Mars  
*(now Global President, Mars Wrigley)*

**“TV is still really powerful for us. It is still the **most mass reaching audience** and it still works for us.**

Marisa Thalberg, Global Chief Brand Officer of Taco Bell  
*(now Chief Brand and Marketing Officer, Lowe’s)*



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



# efficiency

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



**“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

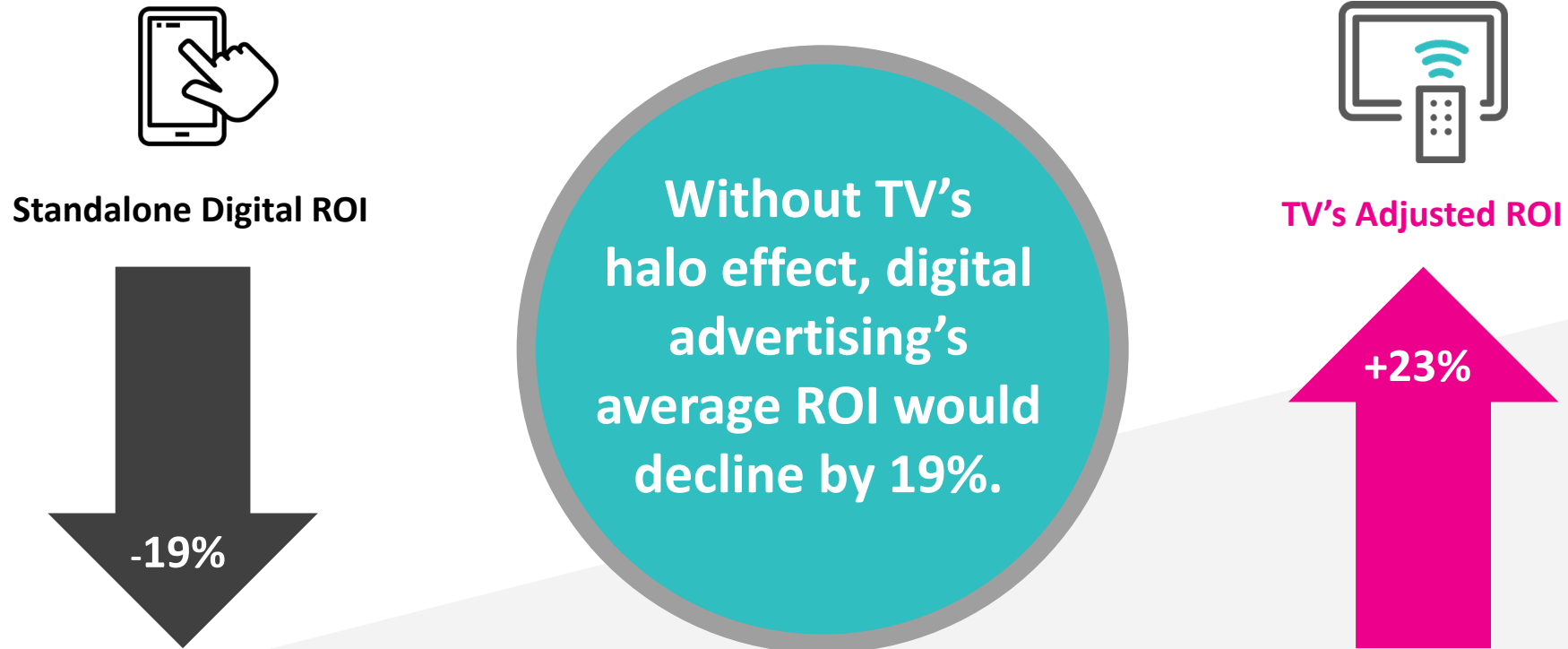
# THE MONEYBALL MOMENT FOR MARKETING IN CANADA

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 it's sales ROI by 19%

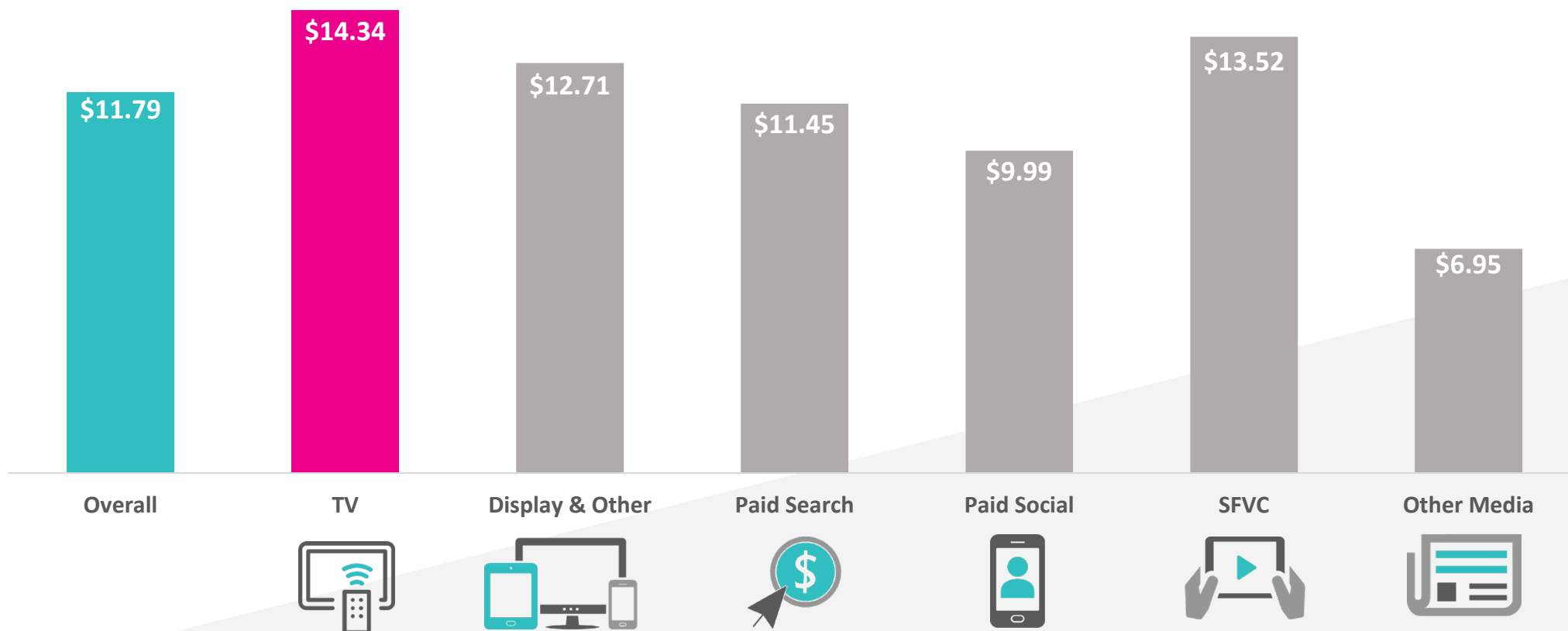




# **tv** delivers the best ROI

driving \$14.34 in return for every dollar spent

## ATTRIBUTED SALES ROI BY MEDIA CHANNEL



**think**tv

# **‘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

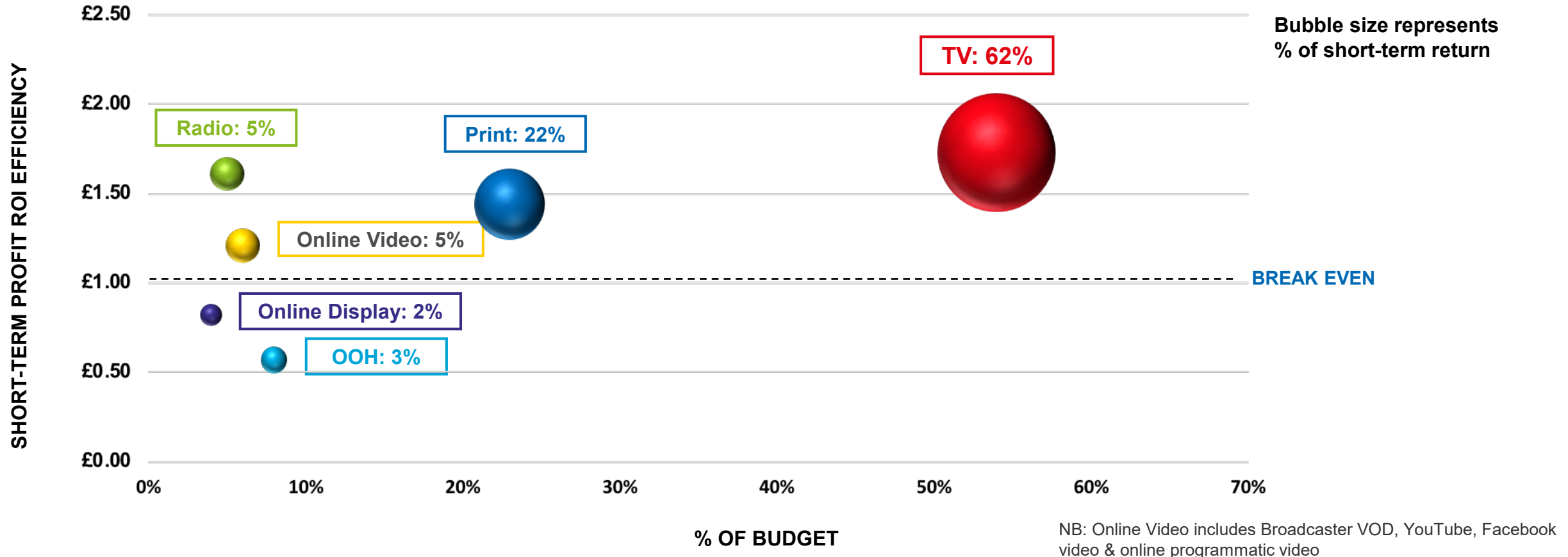
Television

£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

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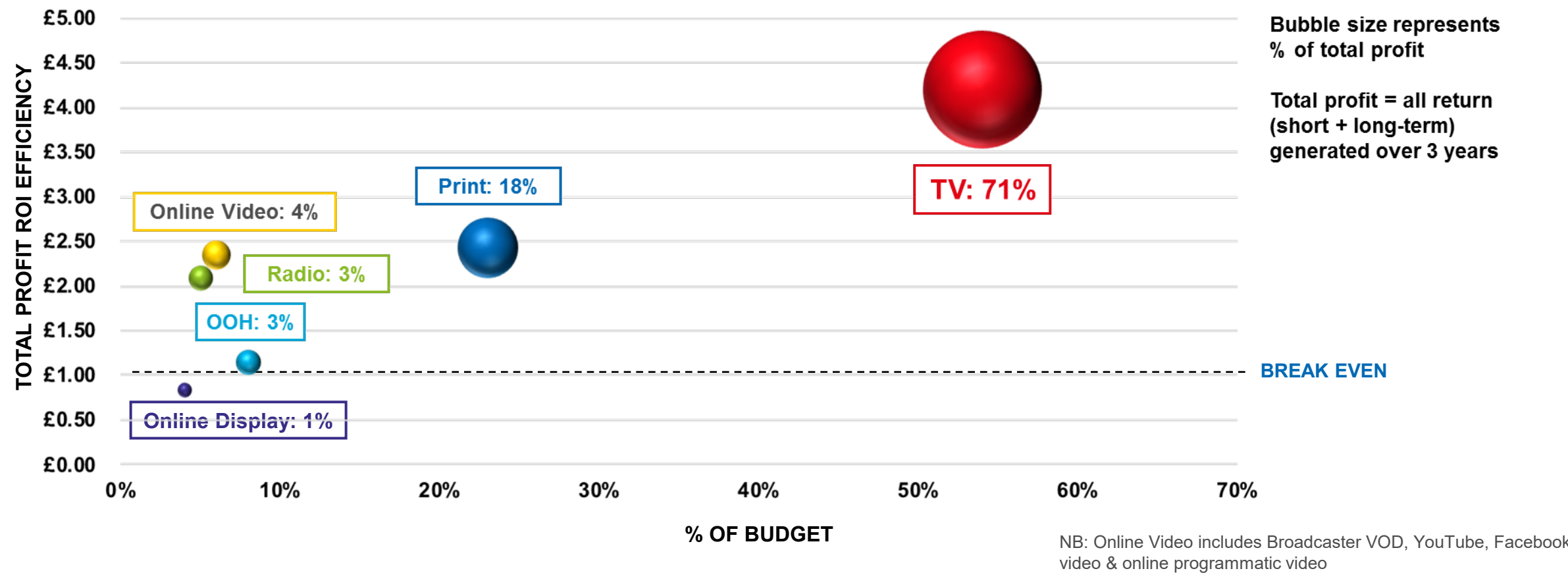
**£3.24**

Television

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**£4.20**

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





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# EFFECTIVENESS IN/CONTEXT

A MANUAL FOR **BRAND-BUILDING**

NOV 2018

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[an excerpt]

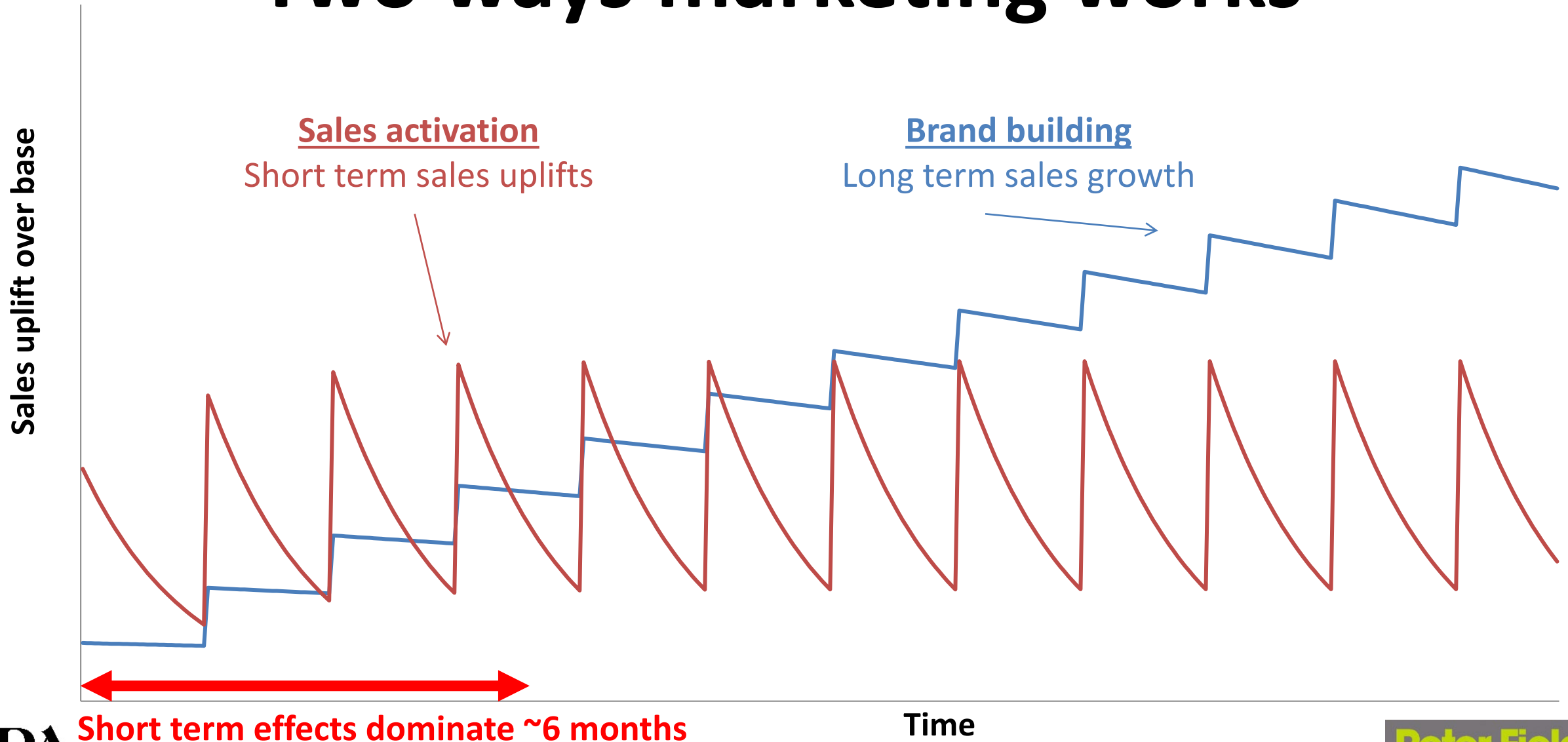


In association with



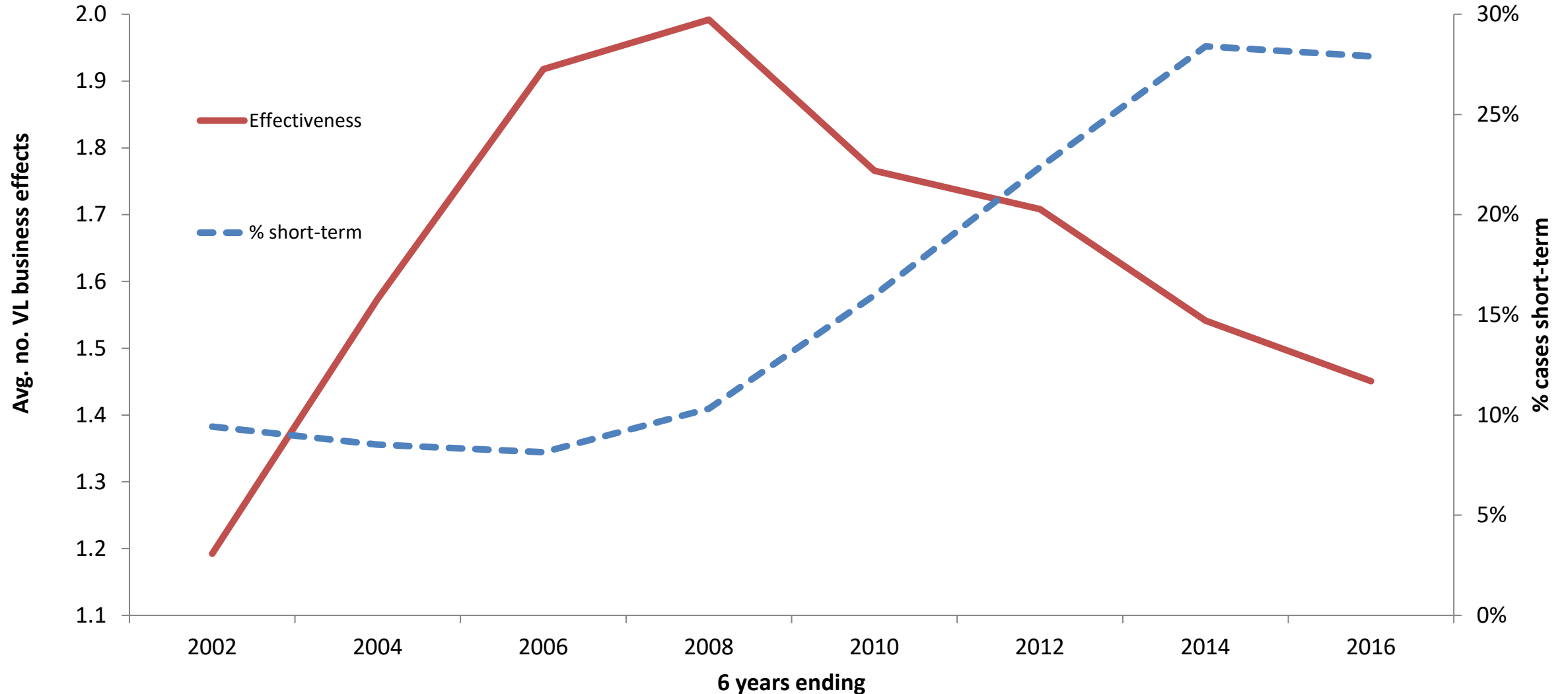


# Two ways marketing works

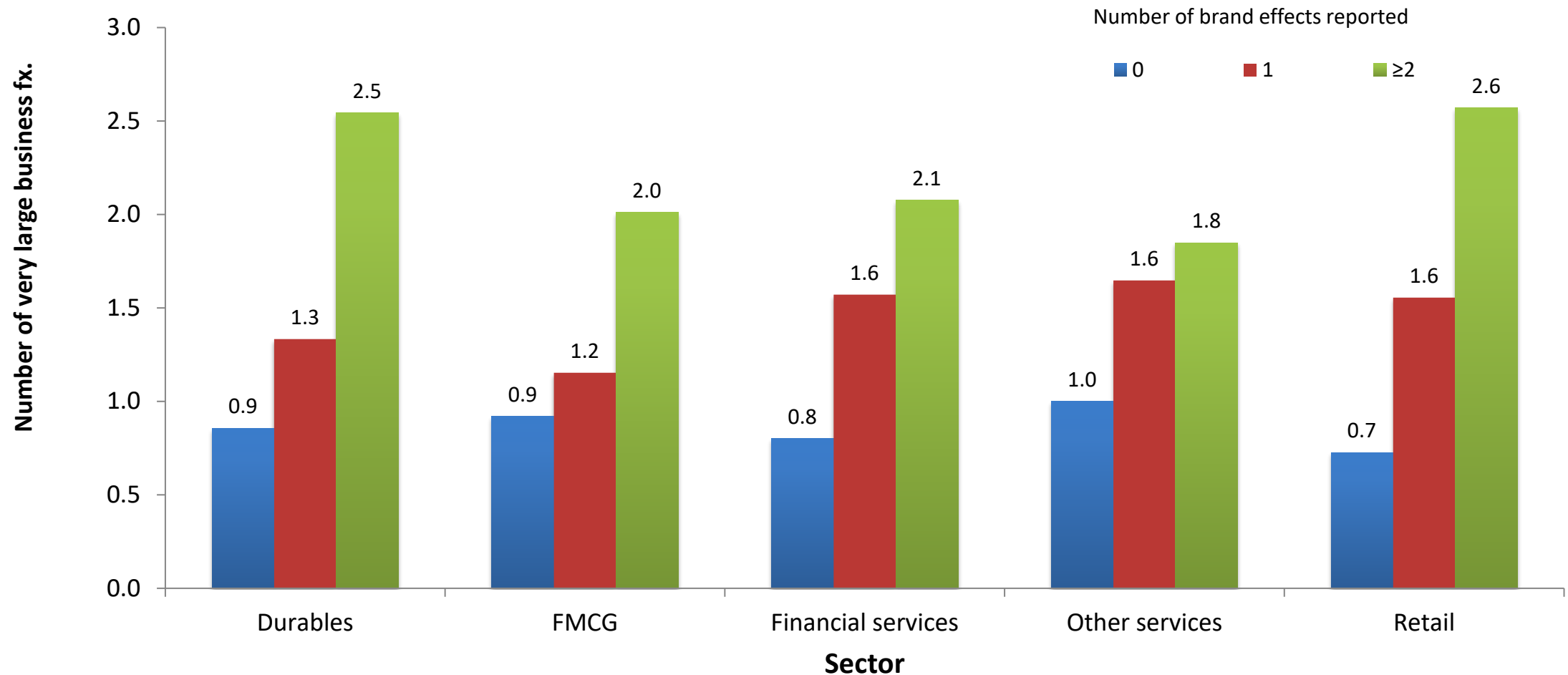




# short-termism has increased; effectiveness has fallen

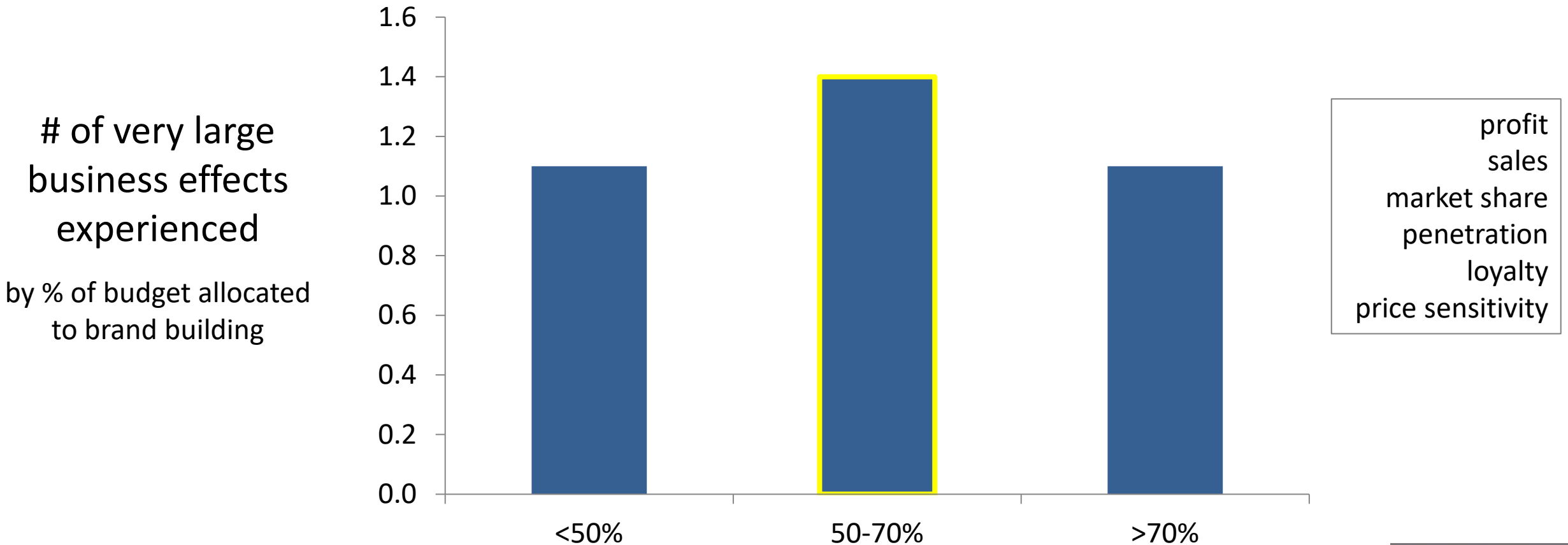


# Brand building always drives long-term effectiveness

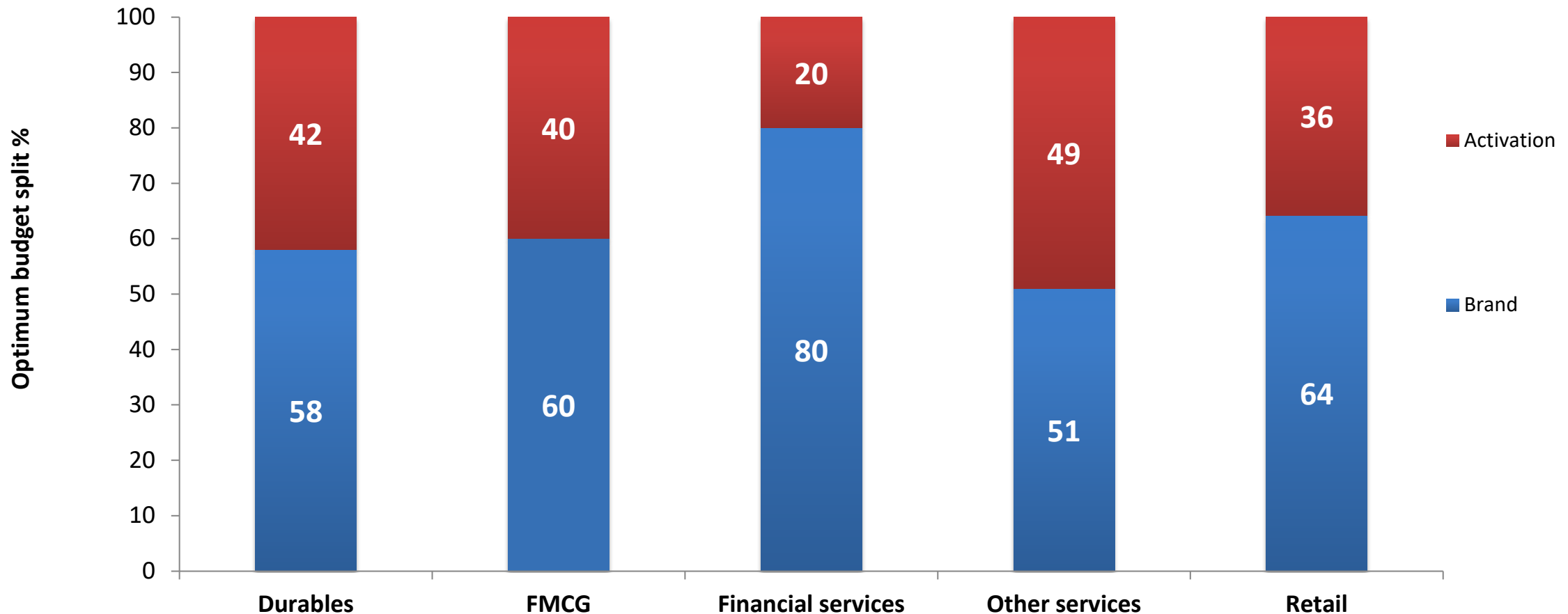


# “the 60:40 rule”

## getting the brand-building : activation balance right



# Activation / Brand weighting varies by industry



# in conclusion

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TV's winning formula is hard to beat

# **tv**'s top attributes



**100% viewable**



**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

# in case you missed it

check out these additional **research reports**

## the 10 key factors driving advertising effectiveness

What has Mark Ritson, the outspoken marketing consultant and industry pundit, learned from his review of 50 years of Effie winners? In this highly engaging and informative talk, Mark outlines the 10 key factors that drive advertising effectiveness.

[learn more »](#)

## advertising in a downturn

On April 21st, Peter Field broke down his latest research into what lessons from previous recessions still resonate today and explores how brands should act during the Coronavirus crisis.

[learn more »](#)

## unlocking profitable growth through creative

Orlando Wood – author of the new IPA book LEMON – reveals how an attentional shift in the 21st Century has led to flatter and less effective advertising.

[learn more »](#)

## 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 »](#)



**reach us @**



**info@thinktv.ca**

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**@thinktvca**

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**thinktv.ca**

# Sources

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**Slides 2, 3, 6, 7:** Numeris, PPM, Total Canada, Consolidated, All Locations, Mo-Su 2a-2a, Sep. 16, 2019 to May 31, 2020

**Slide 4:** TV campaign based on a 900 GRP campaign (6 weeks x150 GRPs), Sep 16, 2019 to May 31, 2020, Total Canada, Ind. 2+, Numeris 2019-20 population estimates.

**Slide 8:** Television: Numeris PPM, Total Canada, Total TV, Consolidated, All Locations, A18+, M-Su 2a-2a, Sept 16, 2019 to May 31, 2020  
Internet (Daily Reach), Radio, Daily Newspaper, Magazine: Numeris RTS, Canada, Spring 2020  
Internet (Weekly Hours): comScore Media Metrix; Multi-Platform; Sept 2019 to April 2020  
(Note: Numeris population estimates used to calculate average weekly hours per capita).

**Slide 9:** Mediastats, Total Canada, Jan 2019, Jan 2020, BDU Profile Report, CTAM 2019

**Slide 10:** Television: Numeris, PPM, Total Canada, Consolidated, All Locations, Mo-Su 2a-2a, Sep. 16, 2019 to May 31, 2020 | Facebook.com, Instagram.com, Twitter.com, Snapchat, Inc.: Comscore Media Metrix Multi-Platform, Canada, Sep. to Nov. 2019 | YouTube: comScore Video Metrix MultiPlatform, Canada, Sept 2019 to May 2020 | (Note: Numeris population estimates used to calculate average weekly hours per capita for digital media)

**Slide 12:** Nielsen Total Ad Ratings campaigns, October 2016 through December 2018

**Slide 15:** Ipsos Media TIPs Study, August 2018

**Slides 16-19 :** thinktv, nlogic, omniVu, National, Feb 2020 (Don't Know/Refuse not included).

**Slide 20:** GroupM Canada, 2016; Marketing Mix models across Consumer Electronics, Retail, Finance, Auto and CPG; Target the (Whole) Market

**Slide 21:** Numerator, Canada, Internet Related Sites and Services Category. For full list of companies contact thinktv.

**Slide 22, 23:** VAB: Direct Effect – Driving Intent for Emerging DTC Brands, 2020

# Sources

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- Slide 28:** Accenture Strategy, ABC; Cross-channel advertising attribution; New insights into multi-platform TV, May 2016
- Slide 31-33:** thinktv, Accenture, Leveraging TV to Drive Improved Media Spend Performance, 2019
- Slide 34-38:** 'Profit Ability: the business case for advertising', November 2017 Ebiquity ROI campaign database (Jan'08-May'17) - Campaign obs: 6000 / Feb'14-May'17 - Campaign obs: 1954
- Slide 39-44:** 'Effectiveness in context: A manual for brand-building' Binet & Field, (November 2018) / IPA Databank