

A blurred background image of a family sitting on a couch. In the foreground, a hand holds a black remote control, and another hand holds a glass bowl of popcorn. The text 'the power of tv' is overlaid on the image.

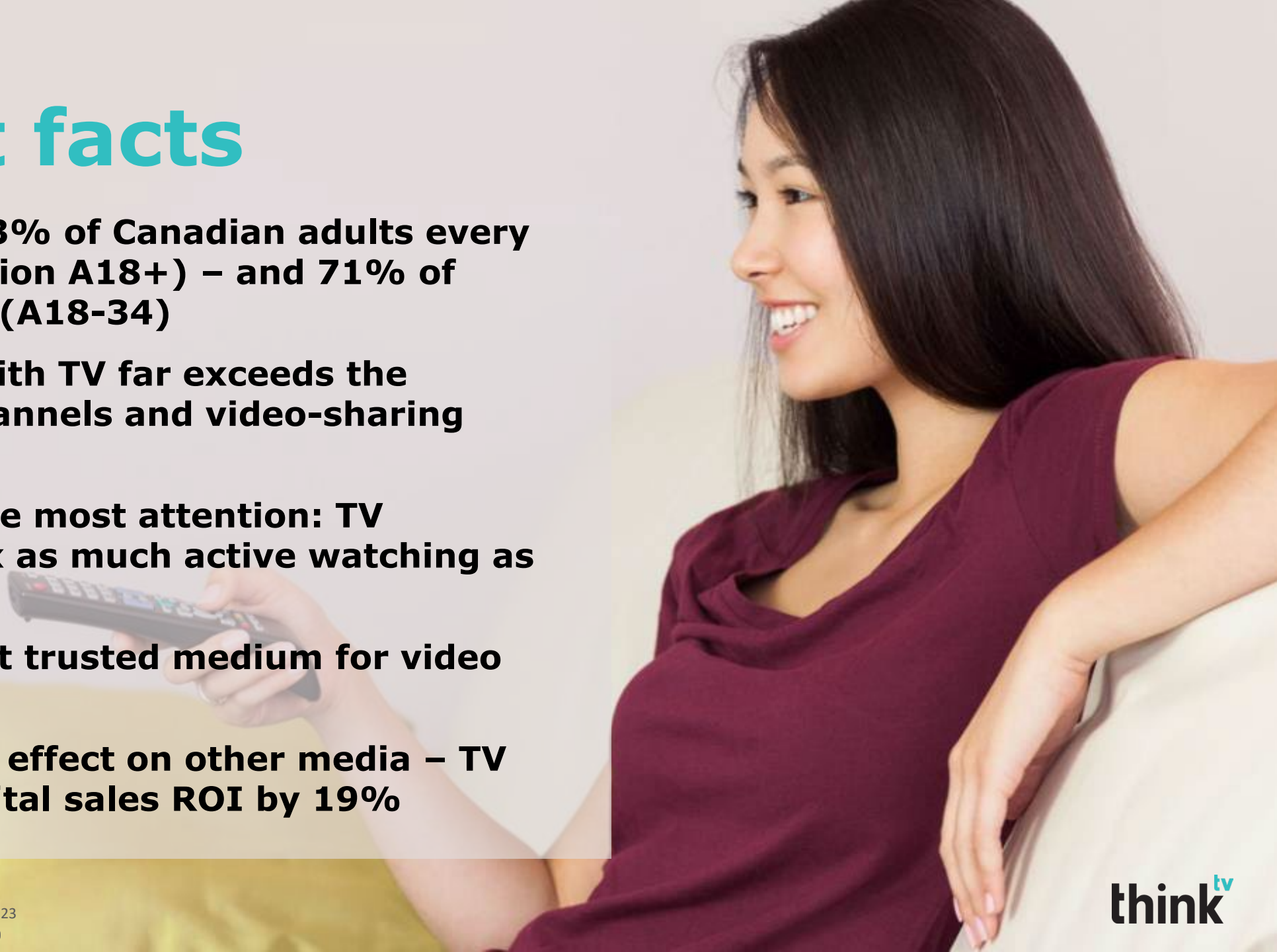
the power of



in an attention economy

tv fast facts

- **TV reaches 83% of Canadian adults every week (27 Million A18+) – and 71% of young adults (A18-34)**
- **Time spent with TV far exceeds the streaming channels and video-sharing platforms**
- **TV garners the most attention: TV commands 2x as much active watching as YouTube**
- **TV is the most trusted medium for video advertising**
- **TV has a halo effect on other media – TV increases digital sales ROI by 19%**



tv is powerful because it **delivers:**

reach

impact

demand

efficiency

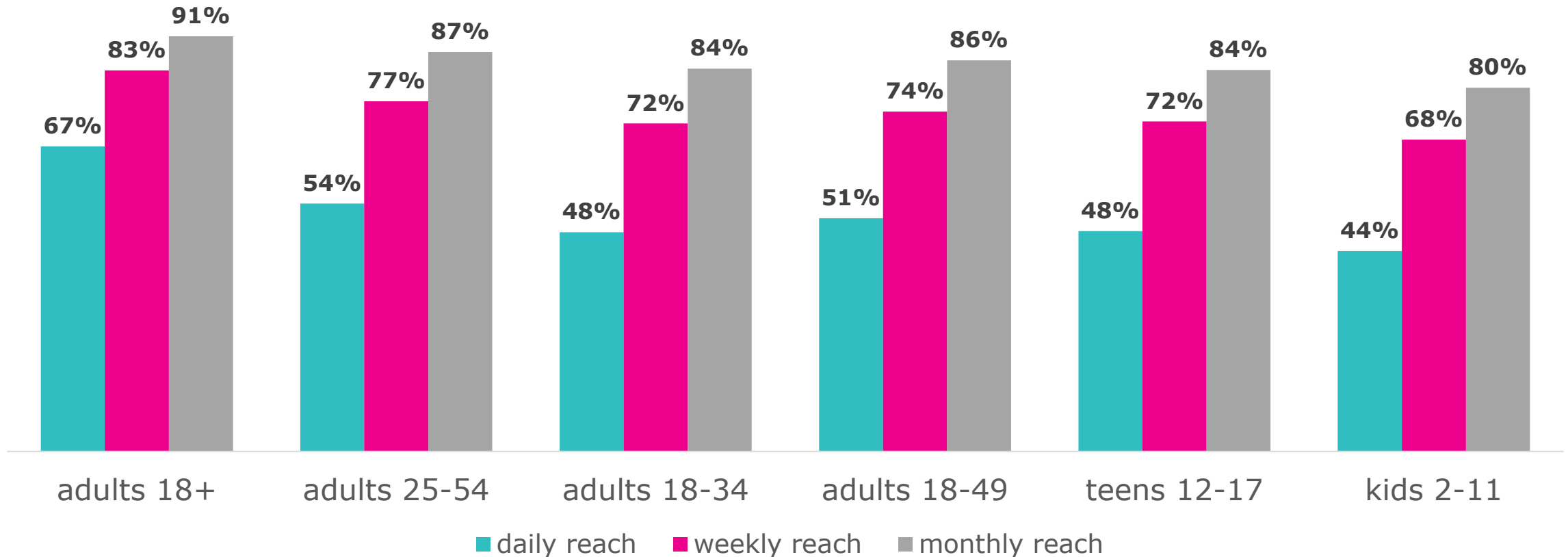
think^{tv}

A man and a woman are sitting on a couch, smiling and looking towards the right. The man is holding a red mug and a remote control. The woman is also holding a red mug. They appear to be watching television. The background is a bright, modern living room with a lamp and a framed picture on the wall.

reach

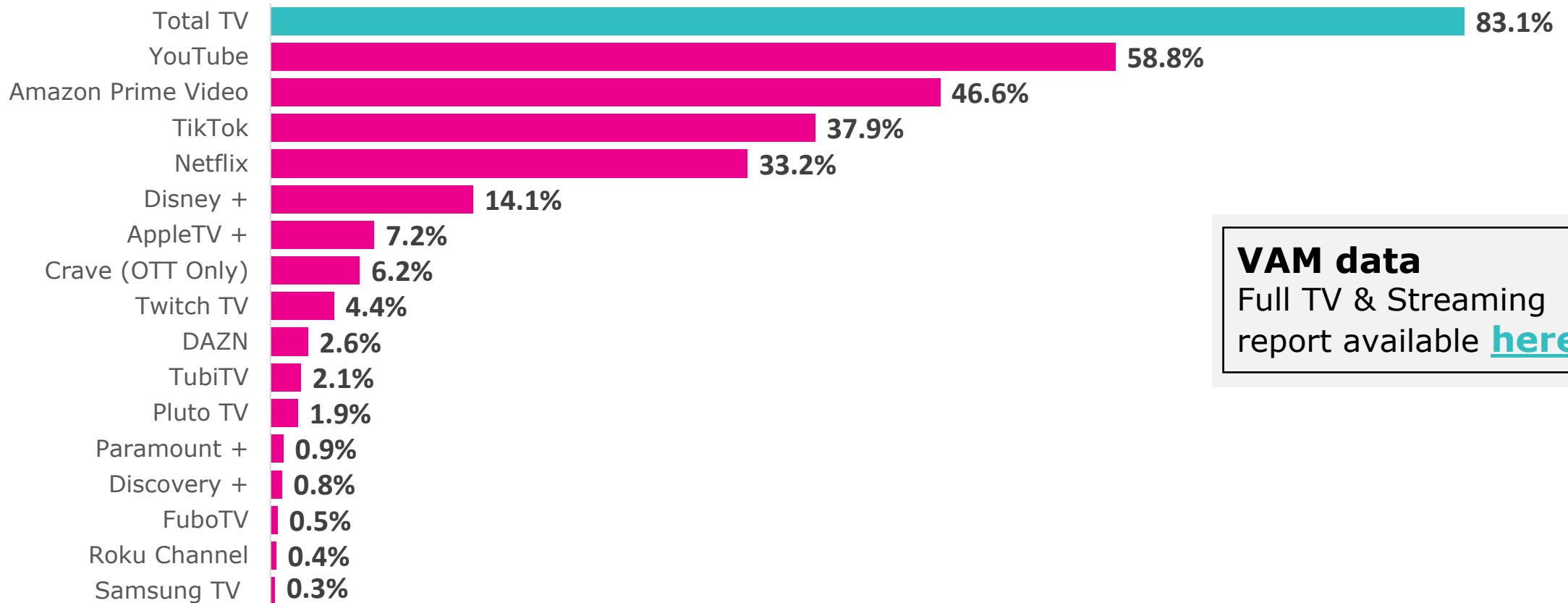
tv has superior reach

tv reaches **91%** of Canadians (18+) every month



tv's reach far exceeds all streaming services

ADULTS 18+ AVERAGE WEEKLY REACH% Ontario



VAM data
Full TV & Streaming
report available [here](#)

Total TV defined as linear TV and broadcaster streaming services

Streaming Services include in-home viewing only

Source: Numeris VAM, Aug 28 – Nov 16 2023



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

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

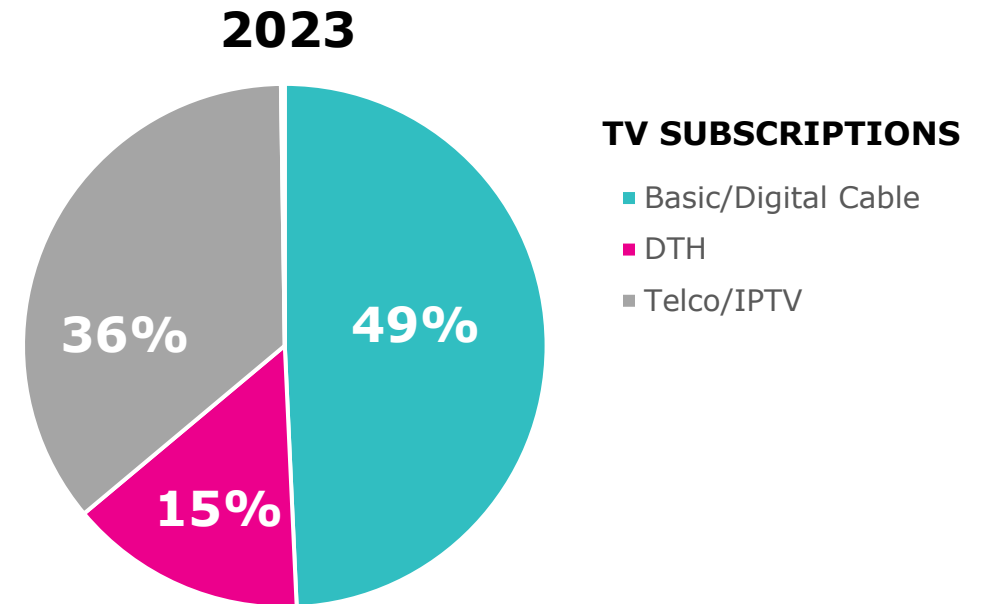
Byron Sharp
Professor of Marketing Science, University of South Australia

10 million paid **tv** subscriptions

Cord cutting has been far overstated: Paid TV subs down only 1%.

Distribution of linear TV is evolving. Household penetration of paid TV subs is still strong, but the reality is that anyone with an internet connection has access to linear TV.

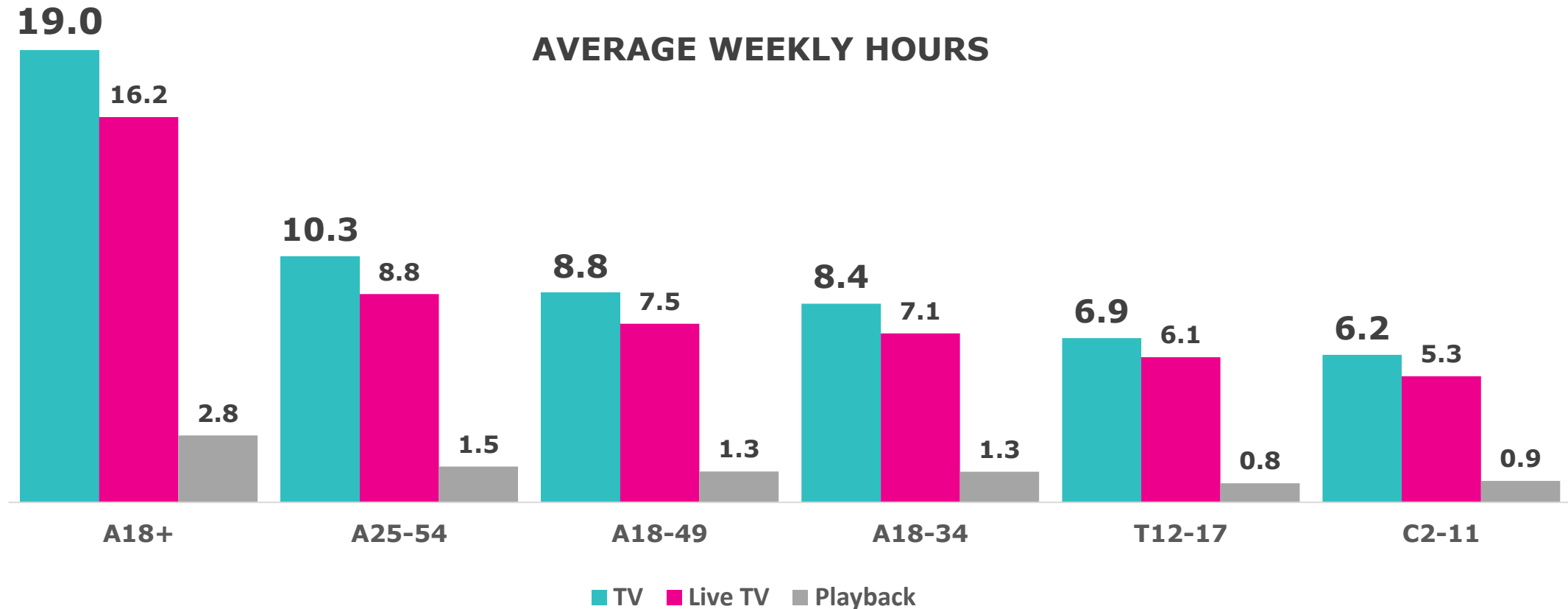
	January '23	June'23	Index
Total Paid Subs	9,976,228	9,921,891	99
Basic/Digital Cable	4,942,166	4,889,042	99
Satellite	1,493,191	1,452,503	97
Telco/IPTV	3,517,281	3,556,771	101
Other	23,590	23,575	100



Canadians watch a lot of



and most of it is live



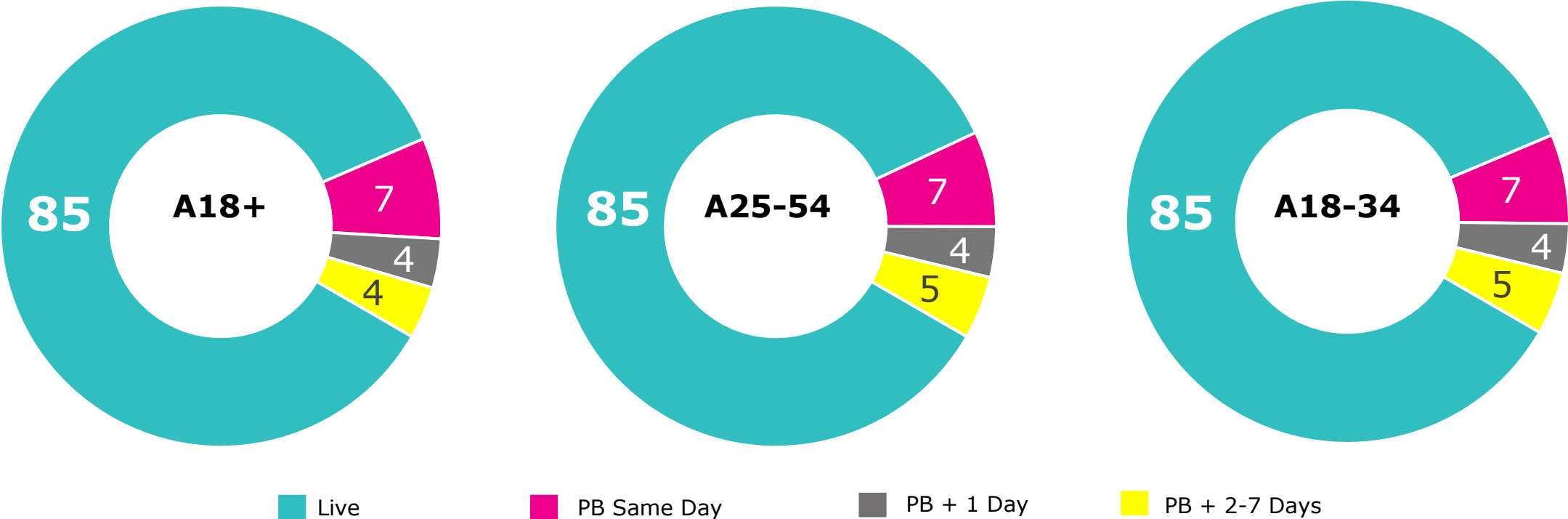
TV = viewing to any live broadcaster content (streamed on any platform and linear TV) plus any broadcaster content recorded on PVR (with commercial load intact) that is viewed within 7 days of initial broadcast. Does not include on demand streaming.

Source: Numeris PPM, Total Canada, Total Hours (000) Sep 18 - Dec 17, 2023

85% of linear **tv** viewing is **live**

Even among young adults, 85% of TV viewing is live, while 92% is live + same day playback

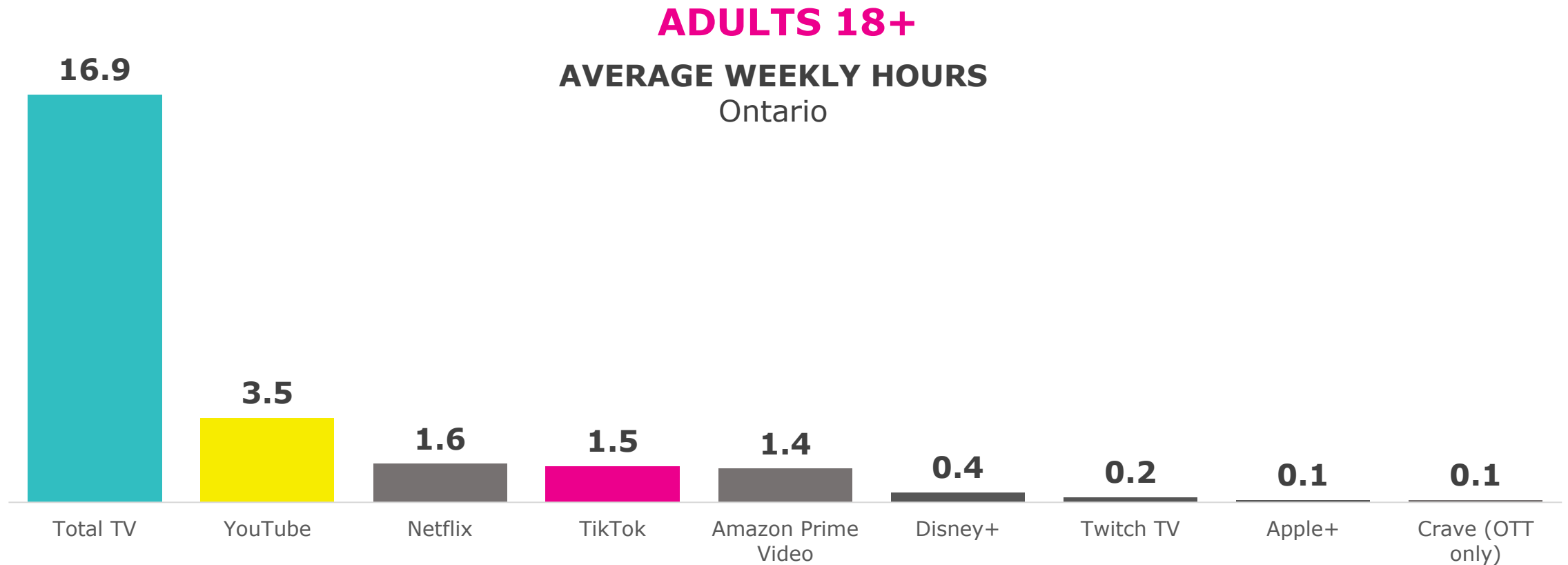
LIVE TV VS PLAYBACK
(% of Total TV Viewing)



TV = viewing to any live broadcaster content (streamed on any platform and linear TV) plus any broadcaster content recorded on PVR (with commercial load intact) that is viewed within 7 days of initial broadcast. Does not include on demand streaming.

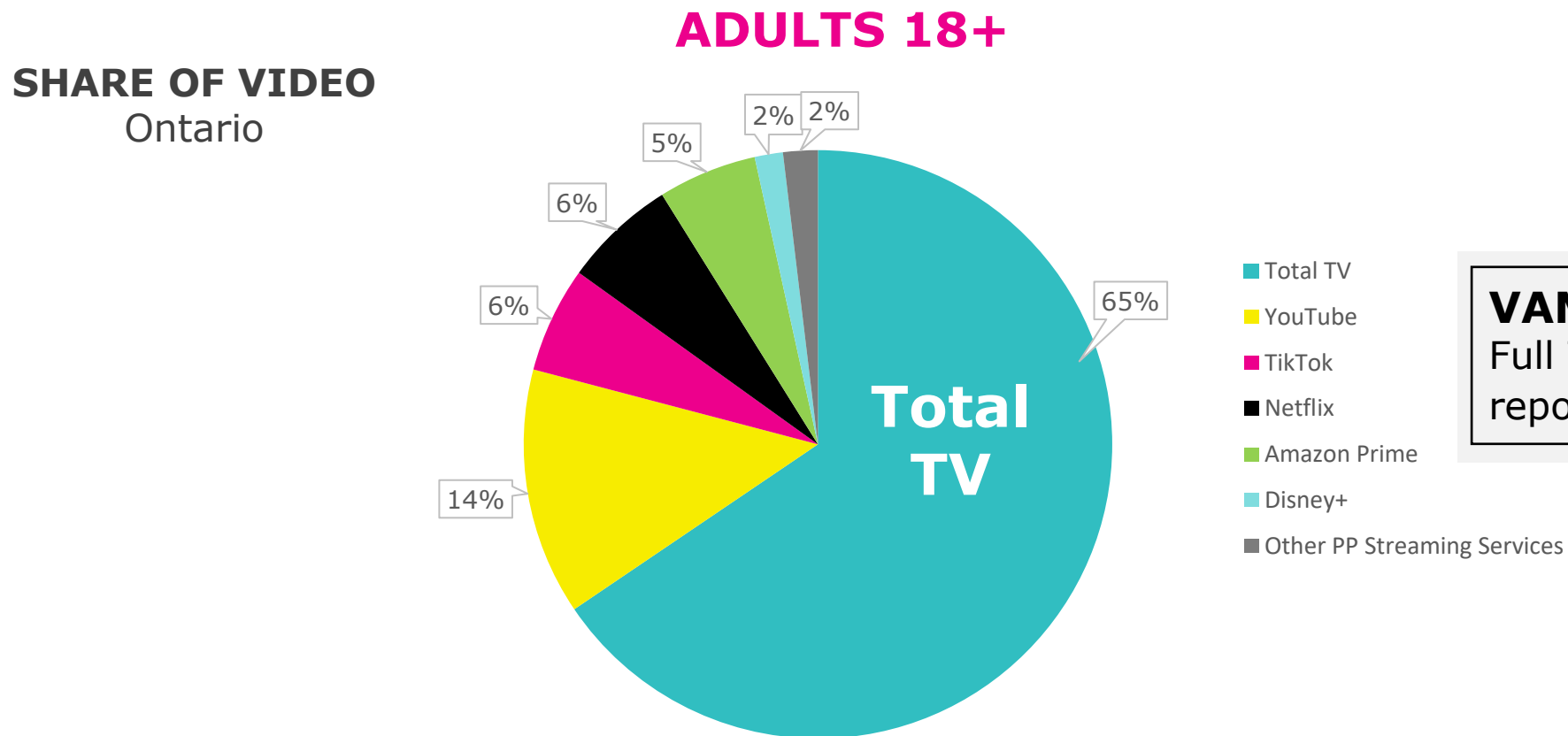
Source: Numeris PPM, Total Canada, Total Hours (000) Sep 18 - Dec 17, 2023 | PB = Playback

Total TV dominates time spent with video



All time spent per capita
Total TV defined as linear TV and broadcaster streaming services
Streaming Services are primarily commercial free and include in-home viewing only
Source: Numeris VAM 8/28/23 to 11/26/2023

Total TV dominates time spent with video



All time spent per capita

Total TV defined as linear TV and broadcaster streaming services

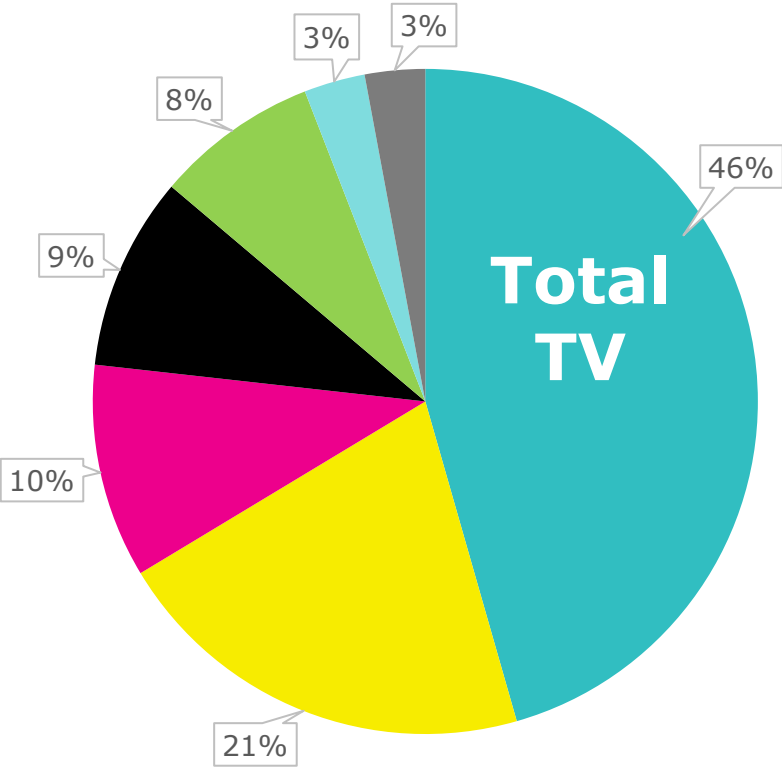
Streaming Services are primarily commercial free and include in-home viewing only

Other Streaming Services includes AppleTV+, CBS News, Club Illico, Crave(OTT Only), Crunchyroll, Daily Motion, DAZN, Discovery Plus, ET Online US, FuboTV, Paramount+, Pluto TV, Roku Channel, Samsung TV Plus, TED, TubiTV, Twitch TV.

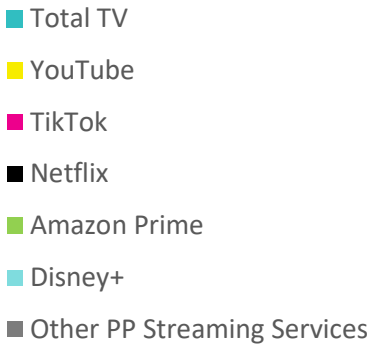
Source: Numeris VAM 8/28/23 to 11/26/2023

in all key demos

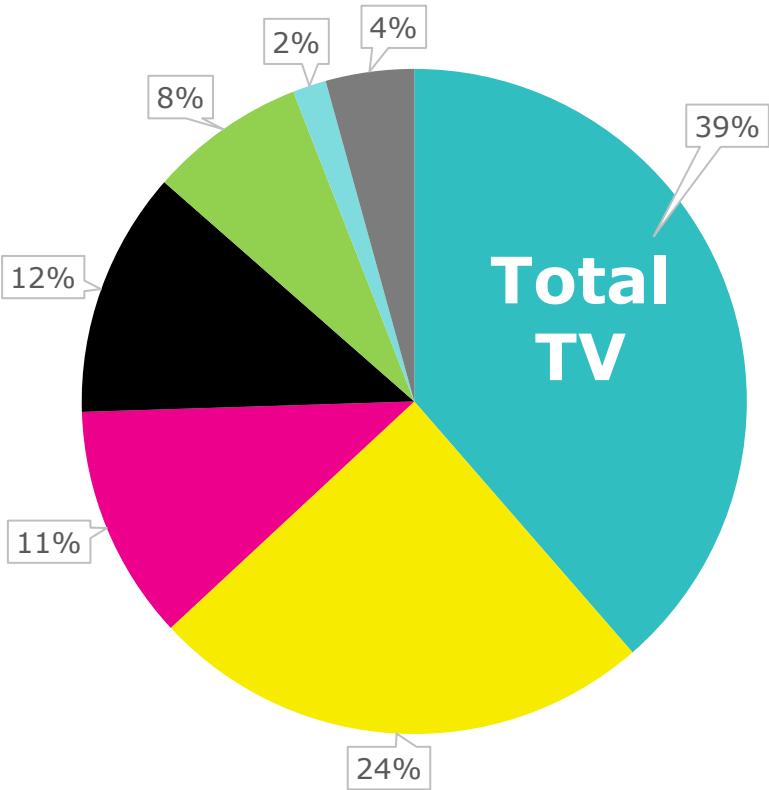
ADULTS 25-54



SHARE OF VIDEO Ontario



ADULTS 18-34



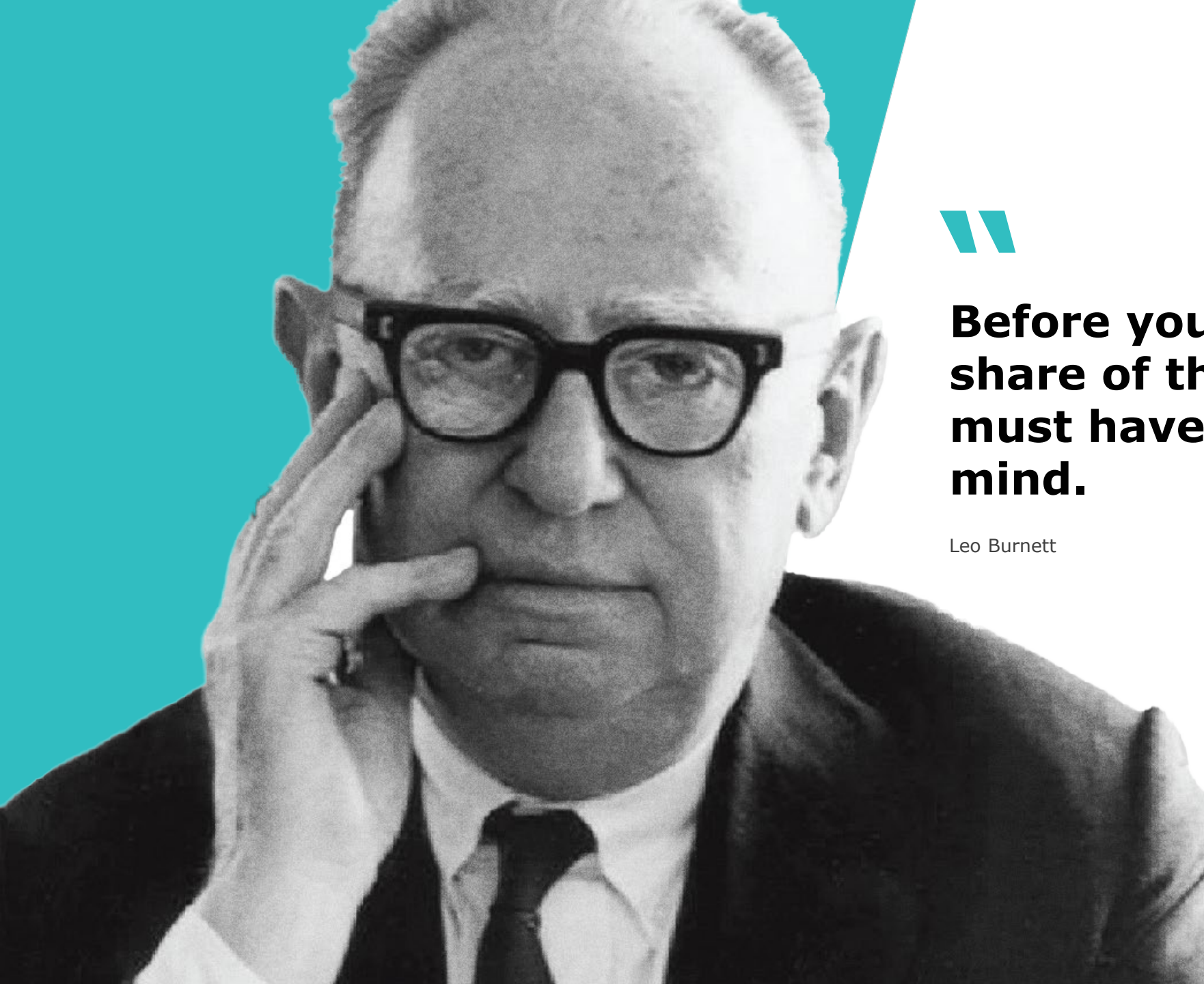
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Source: Numeris VAM 8/28/23 to 11/26/2023

impact

**tv ads are the
most influential**



think^{tv}






“

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

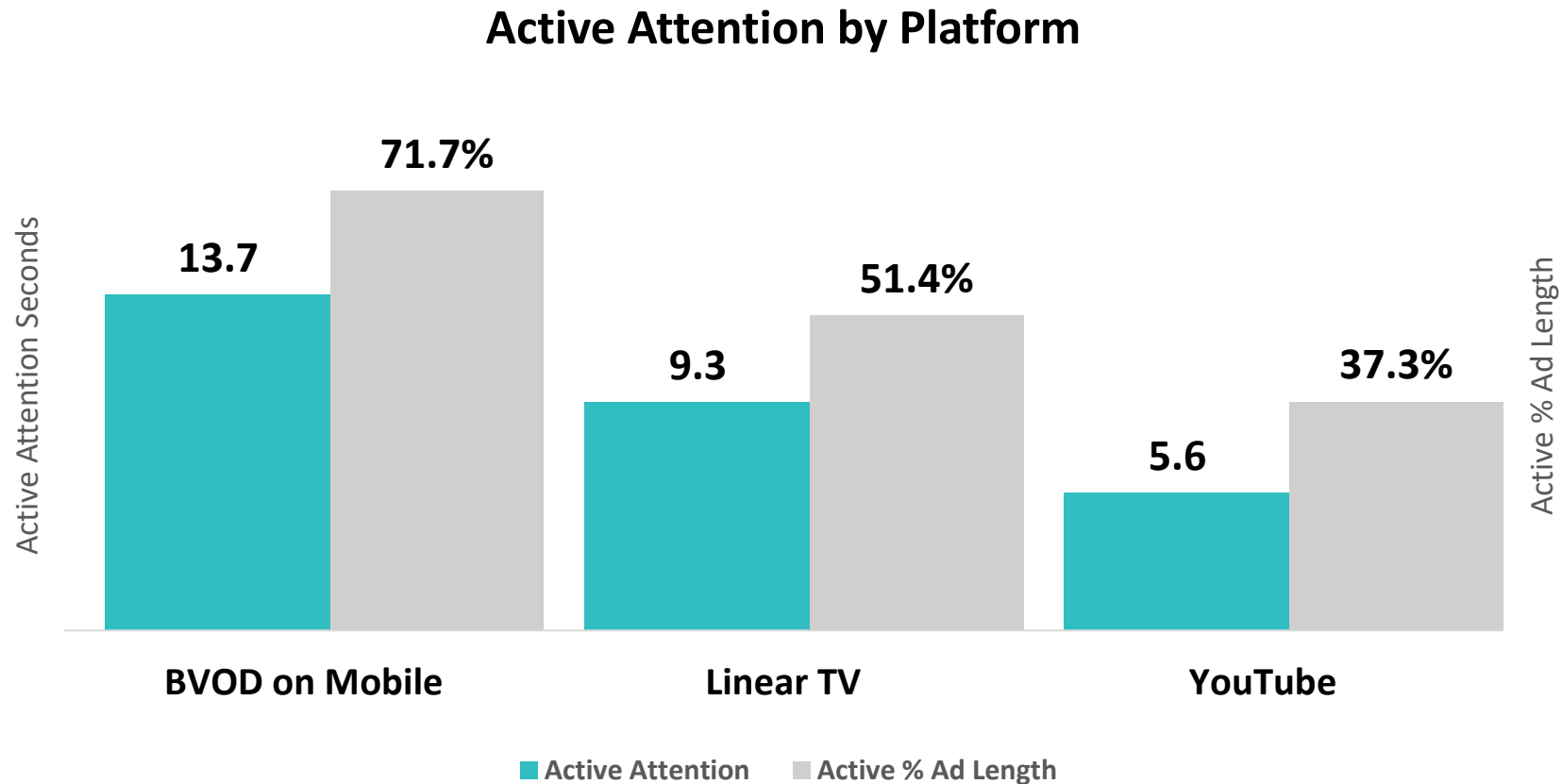
Leo Burnett

commands more attention

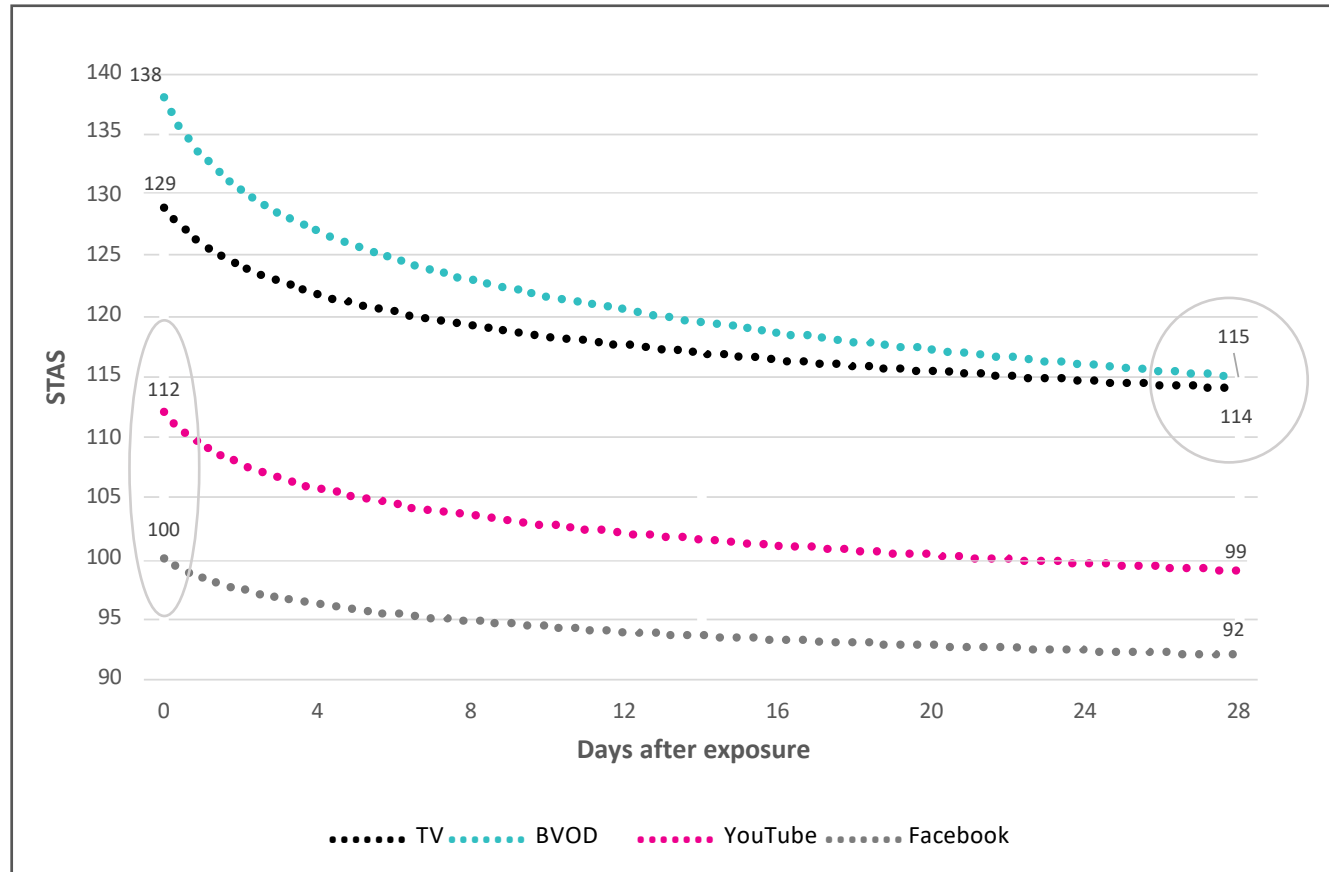
TV commands 2x as much active watching as YouTube and 14x that of Facebook, highlighting one of the key reasons for its ability to have the most impact on sales

			
ACTIVE AVOIDANCE	2%	2%	32%
PASSIVE WATCHING	40%	94%	37%
ACTIVE WATCHING	58%	4%	31%

tv and BVOD on mobile are really strong on active seconds and active % of ad length



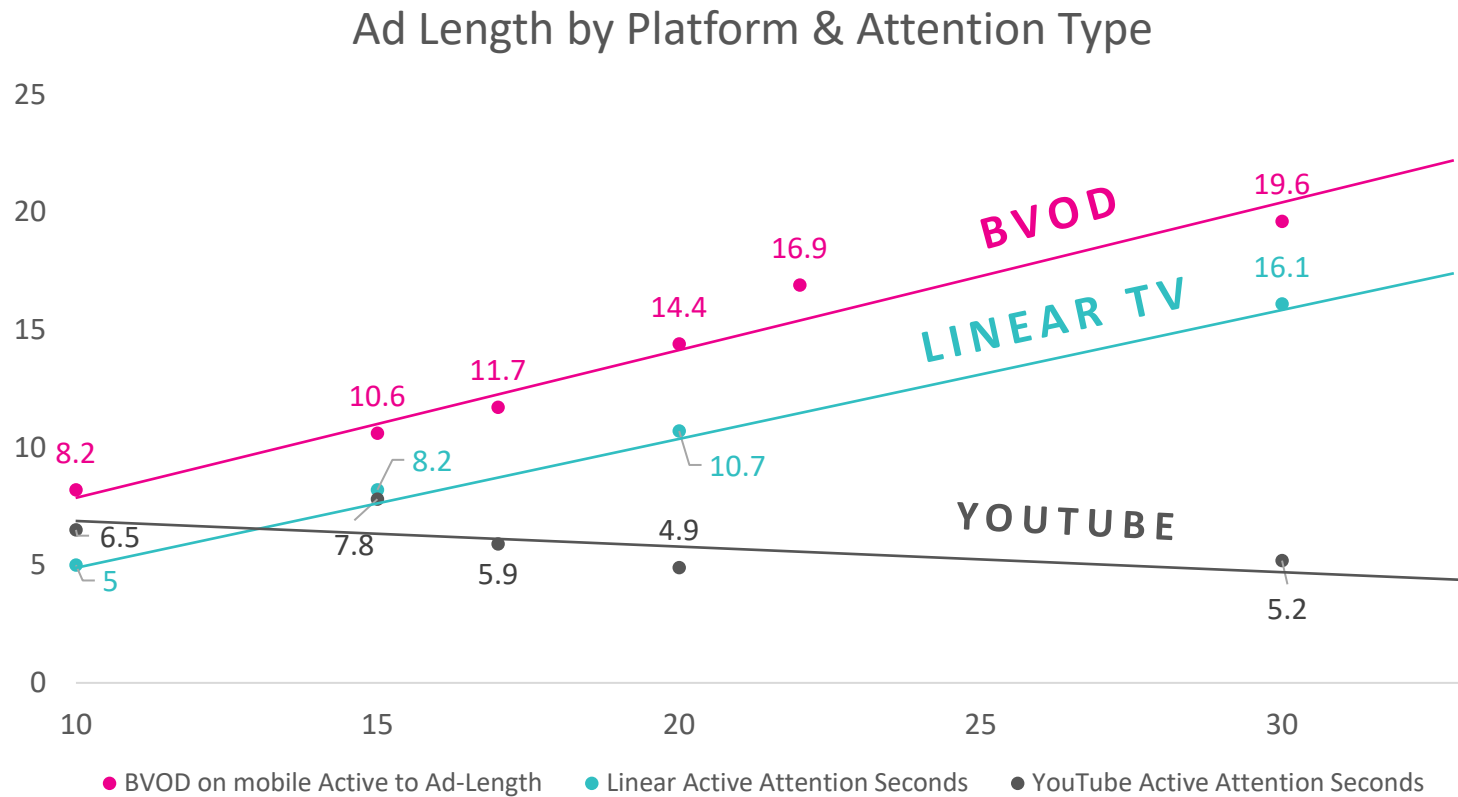
a **tv** ad impacts sales far longer than any other platform



*BVOD Modelled

TV ad retention generates a greater impact at 28 days than either Facebook or YouTube do **immediately** after exposure.

longer ads on **tv** get more attention due to flatter decay distributions

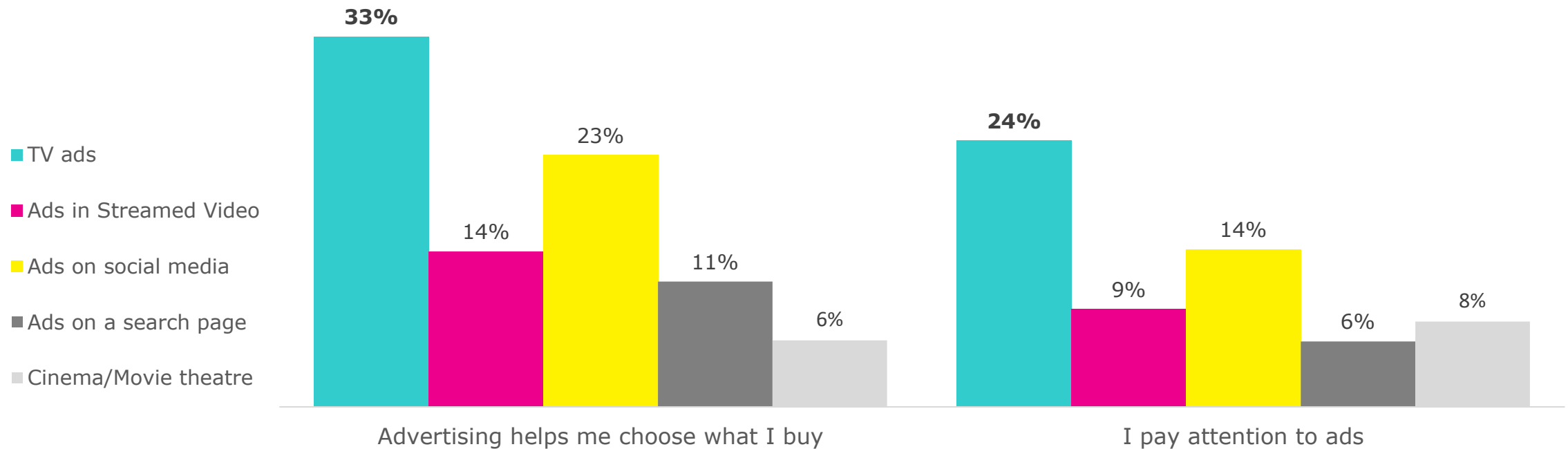


TAKEAWAY:

Longer ads on YouTube do not give you more Attention, **but on BVOD on mobile and Linear TV they do**

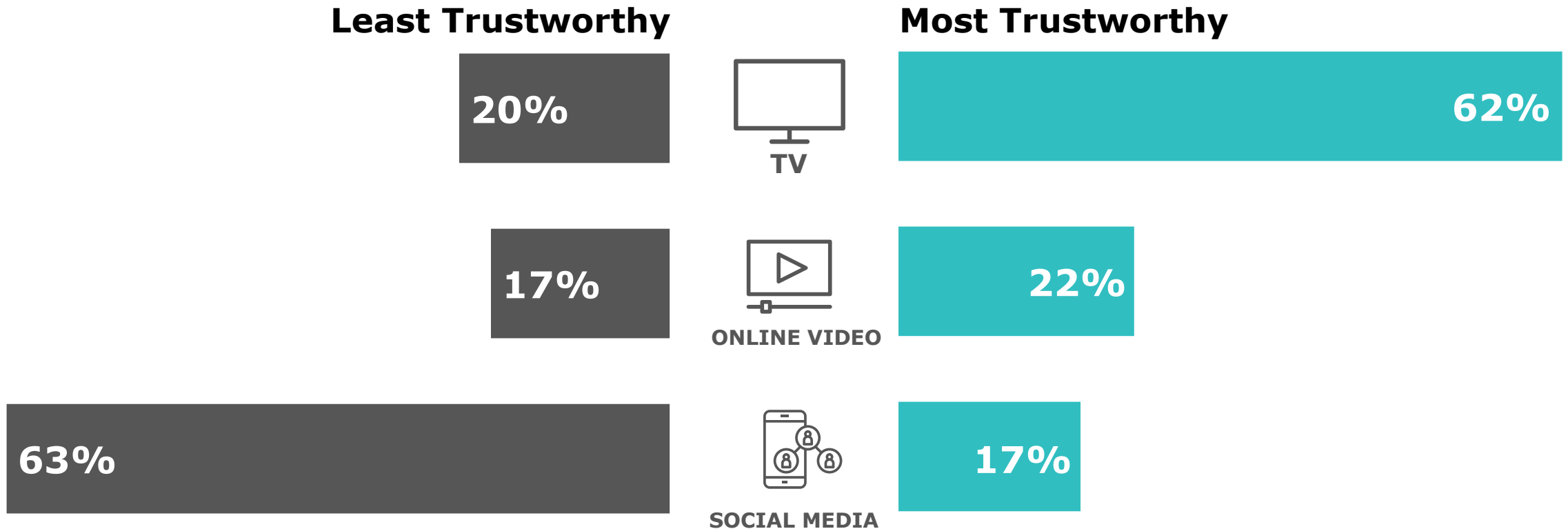
tv advertising is most likely to command attention and drive purchase decisions

ADULTS 18+



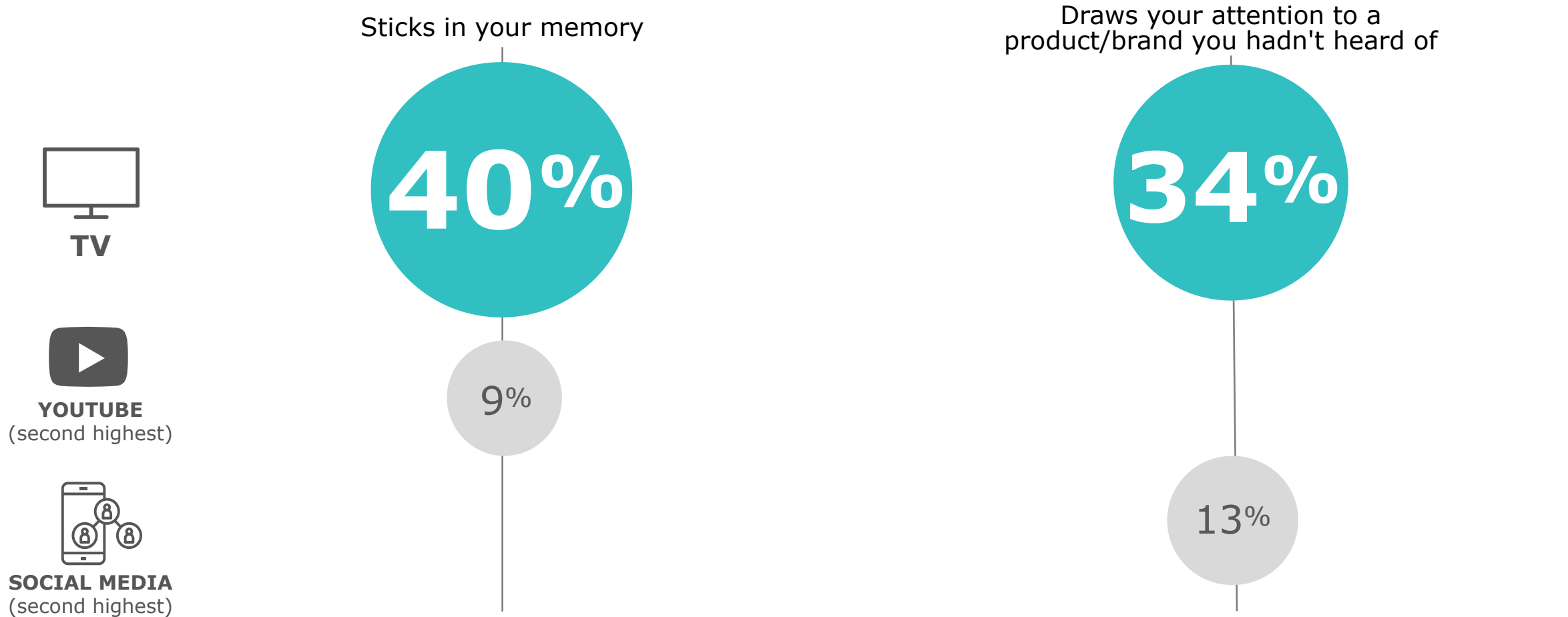
tv is the most trusted medium

(while social media is the least trusted)



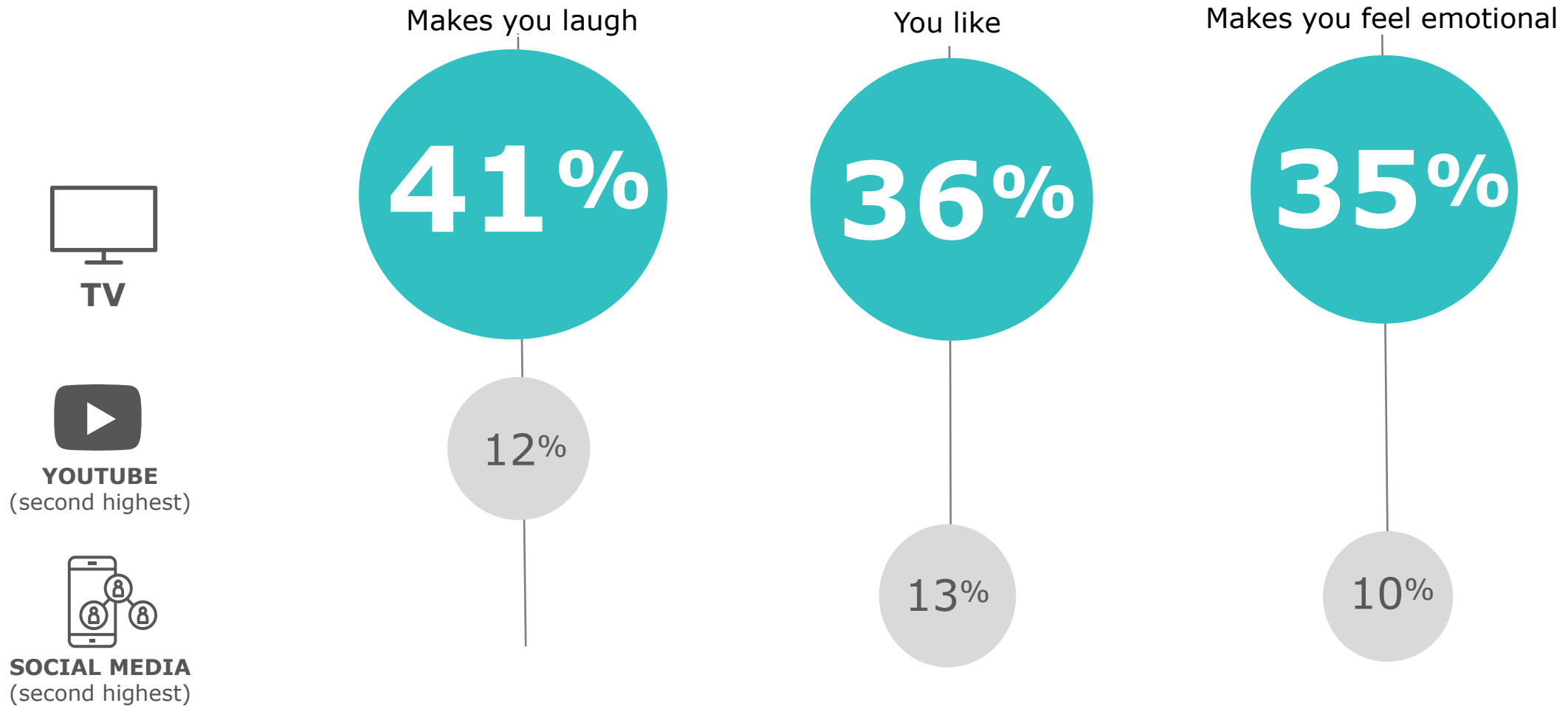
Which one of the following media carries video advertising that you believe to be most trustworthy? least trustworthy?

tv advertising has significant **impact** and is most likely to stick in your memory



In which of the following media are you most likely to find advertising that...?

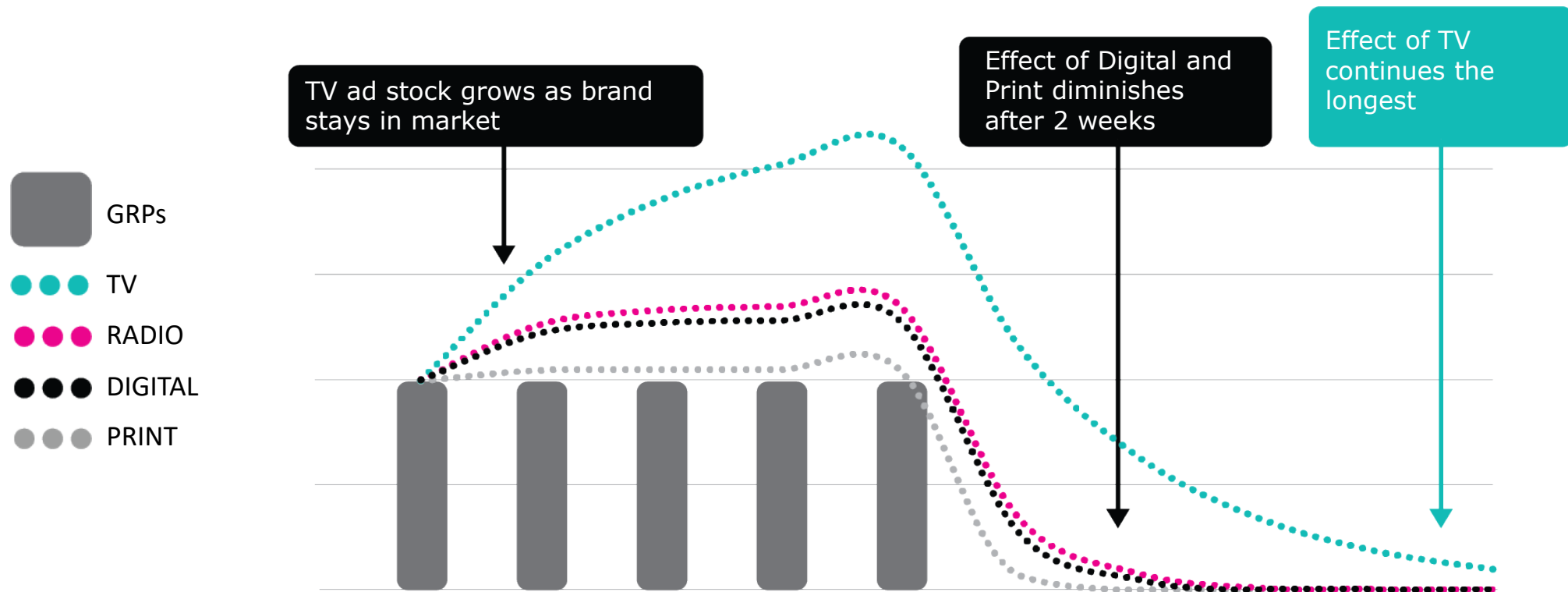
tv advertising is the most likely to generate emotion and make you laugh



In which of the following media are you most likely to find advertising that...?

tv ads deliver the biggest impact

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

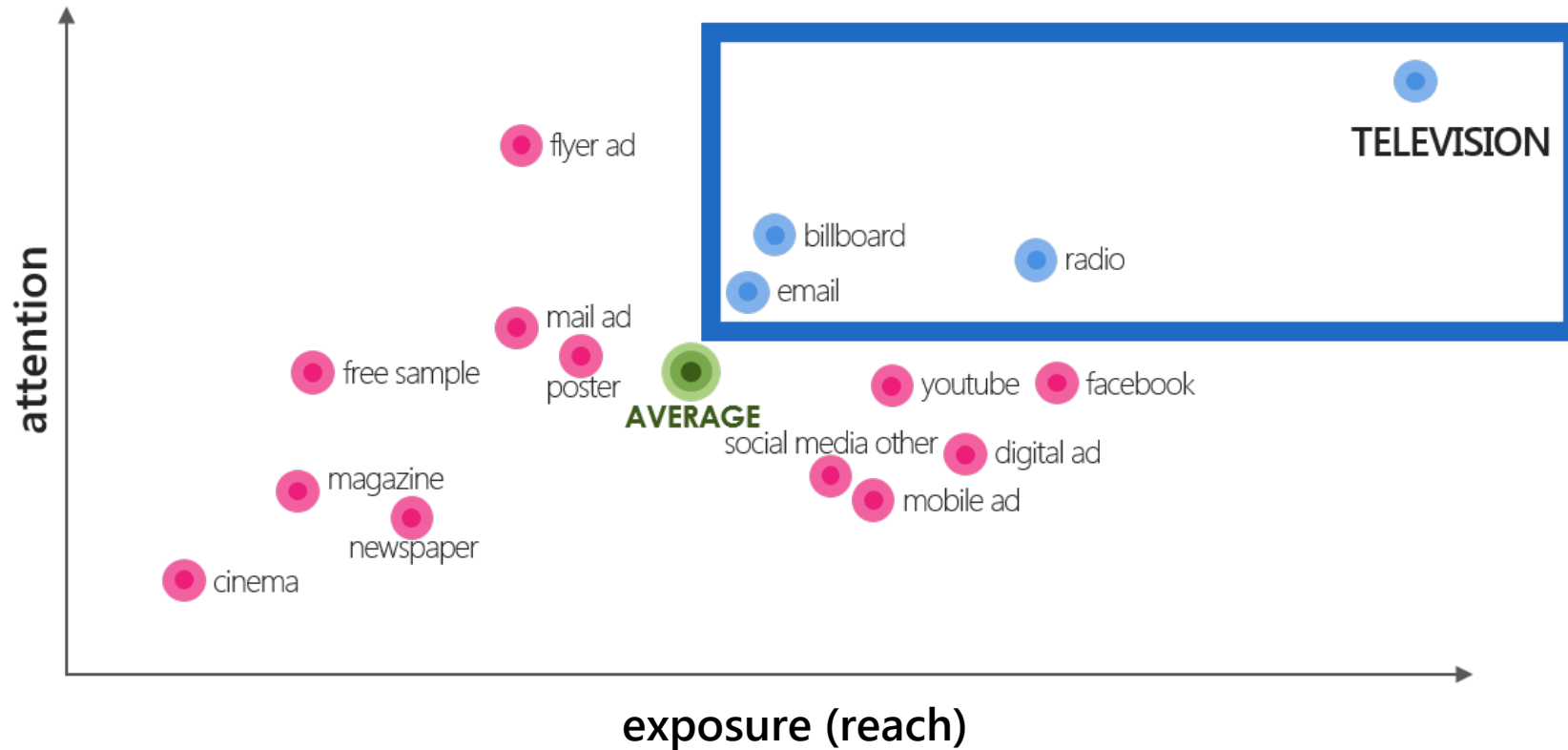


tv is king

when it comes to exposure & attention

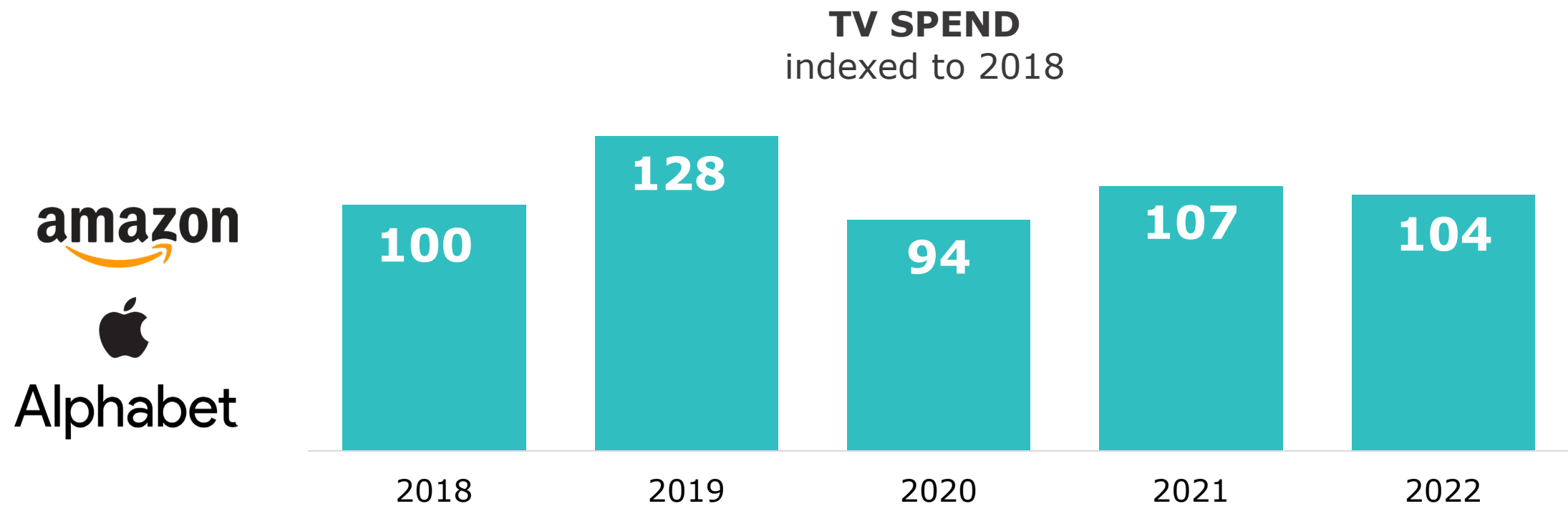
Each medium delivers some combination of reach (exposure) and consumer attention.

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



tech companies continue to invest in

Amazon, Apple and Alphabet, with some of the best analytics available, continue to invest millions of dollars in TV advertising.



demand

**tv drives consumer
action**



tv works throughout the funnel

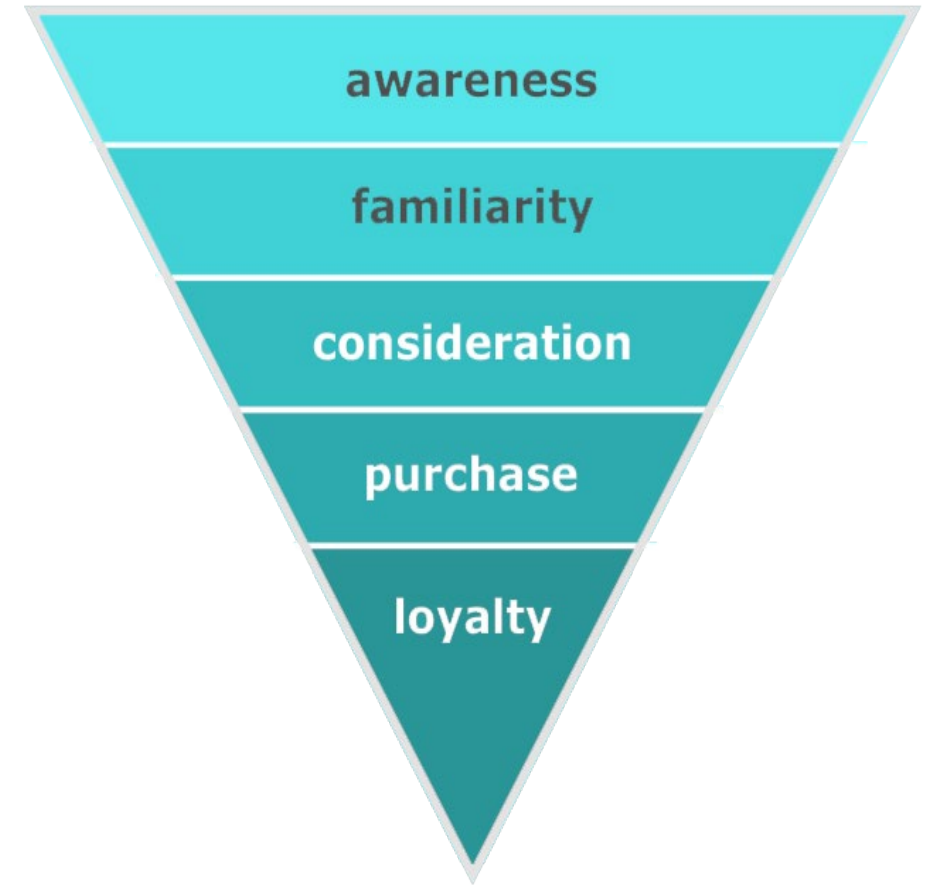
TV is your best store-front window

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



tv delivers more sales uplift than any other platform

	STAS Index
BVOD (MOBILE)	138
TV ON TV	129
YOUTUBE	112
INSTAGRAM	105
FACEBOOK	100

TV, regardless of device, drives more sales uplift than any other platform

STAS = Short Term Advertising Strength

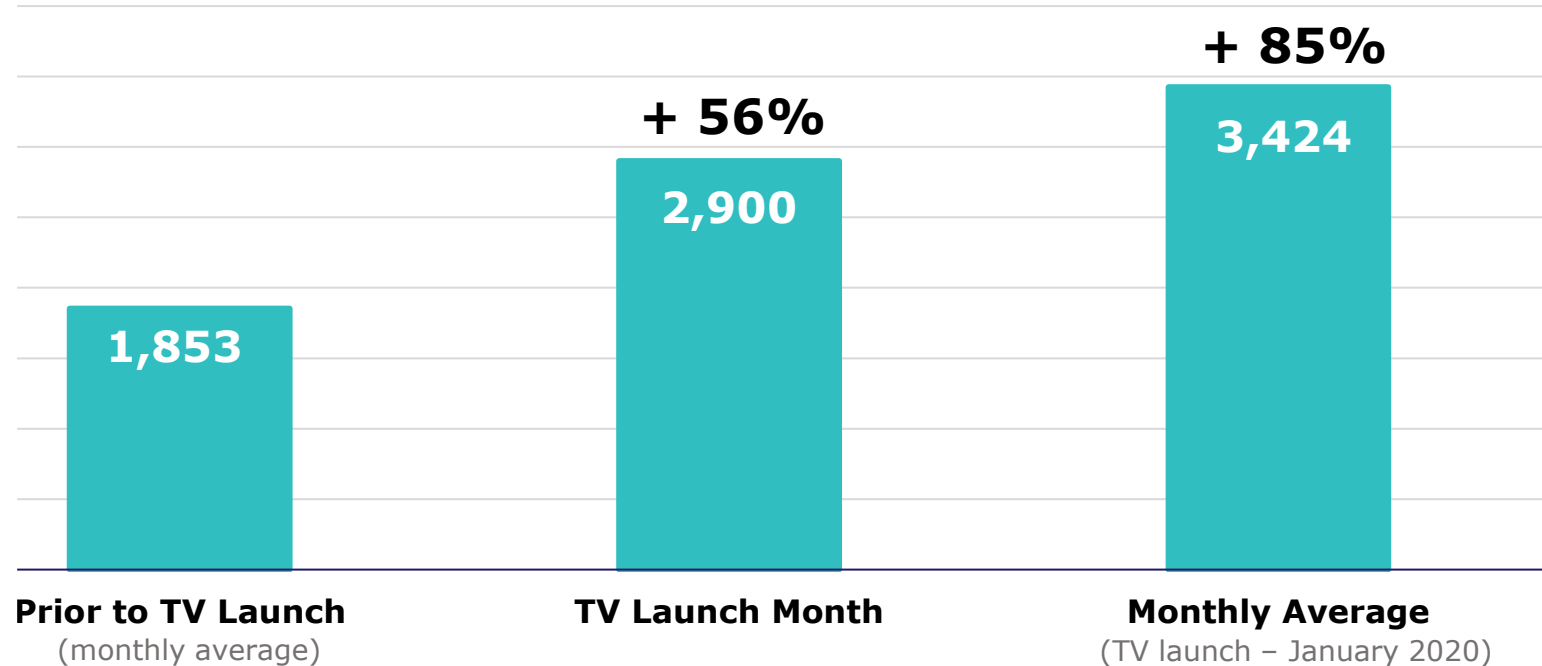
tv drives the growth

of both established and emerging companies

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.

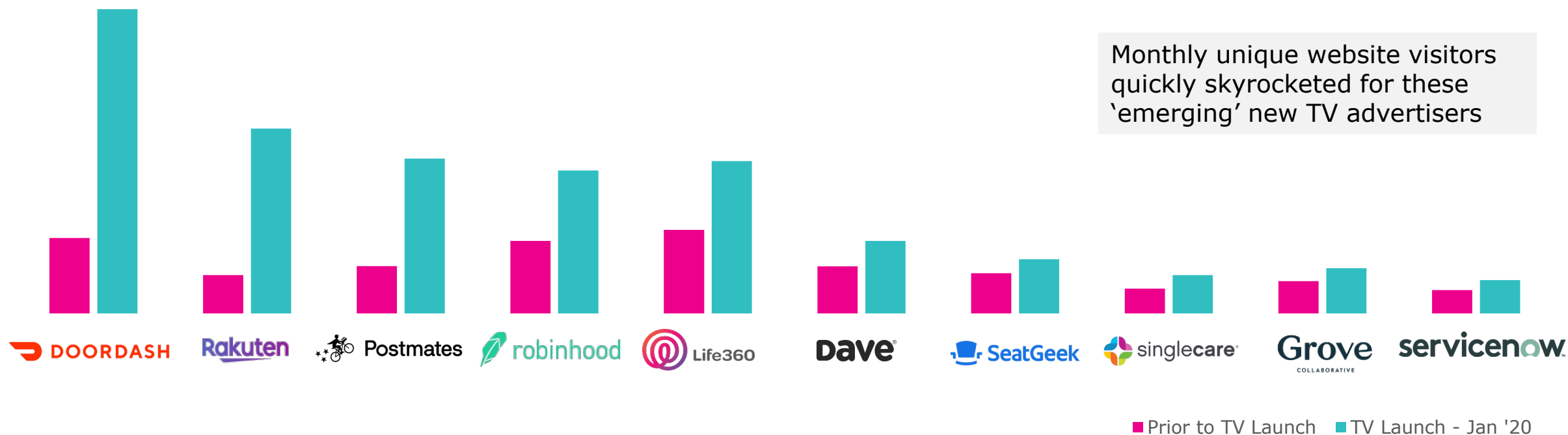


VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Feb '18 – Jan '20 (calendar months). VAB analysis of Comscore mediametrix multiplatform media trend data, total audience (Desktop 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 drives the growth of both established and emerging companies

MONTHLY WEBSITE UNIQUE VISITORS (000) COMPARISON

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



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.

efficiency

**tv delivers the
highest ROI**

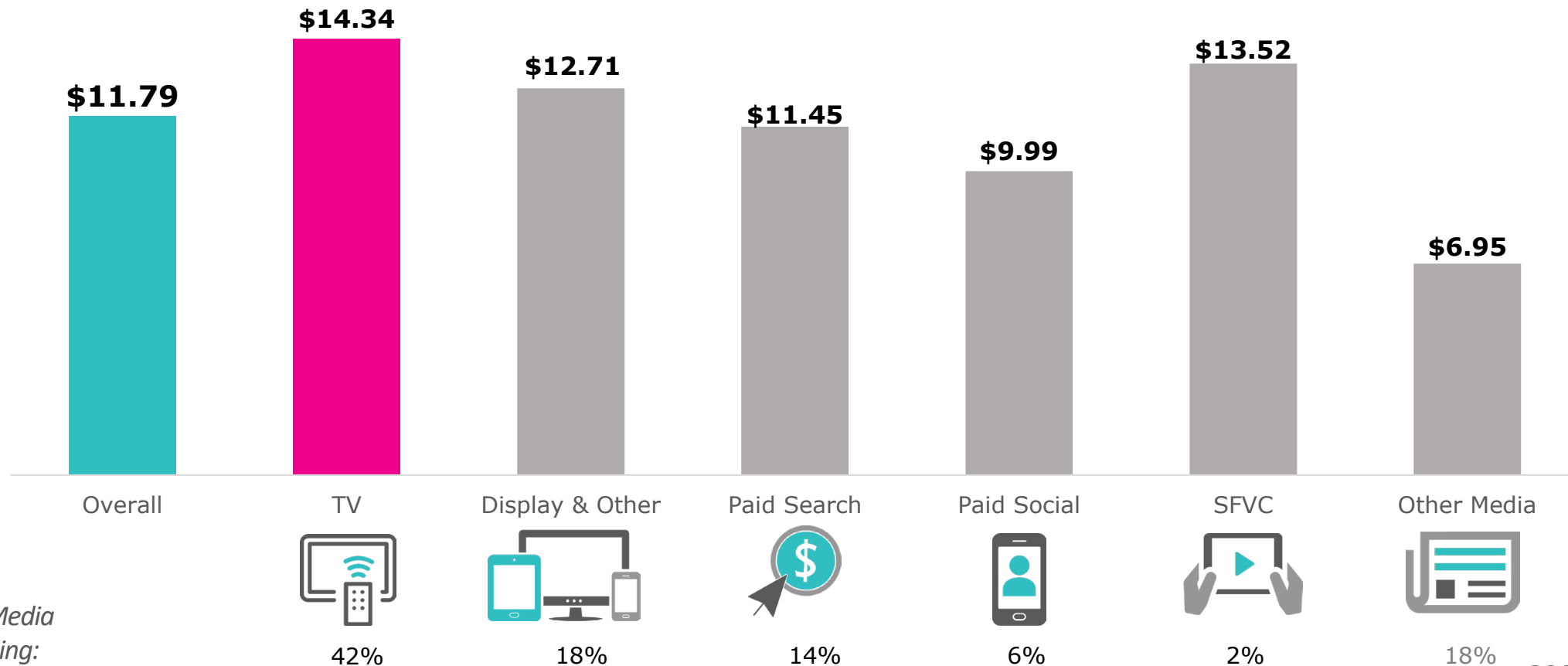


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tv delivers the best ROI

TV's ROI is \$14.34 for every dollar spent

ATTRIBUTED SALES ROI BY MEDIA CHANNEL OVER A ONE YEAR PERIOD

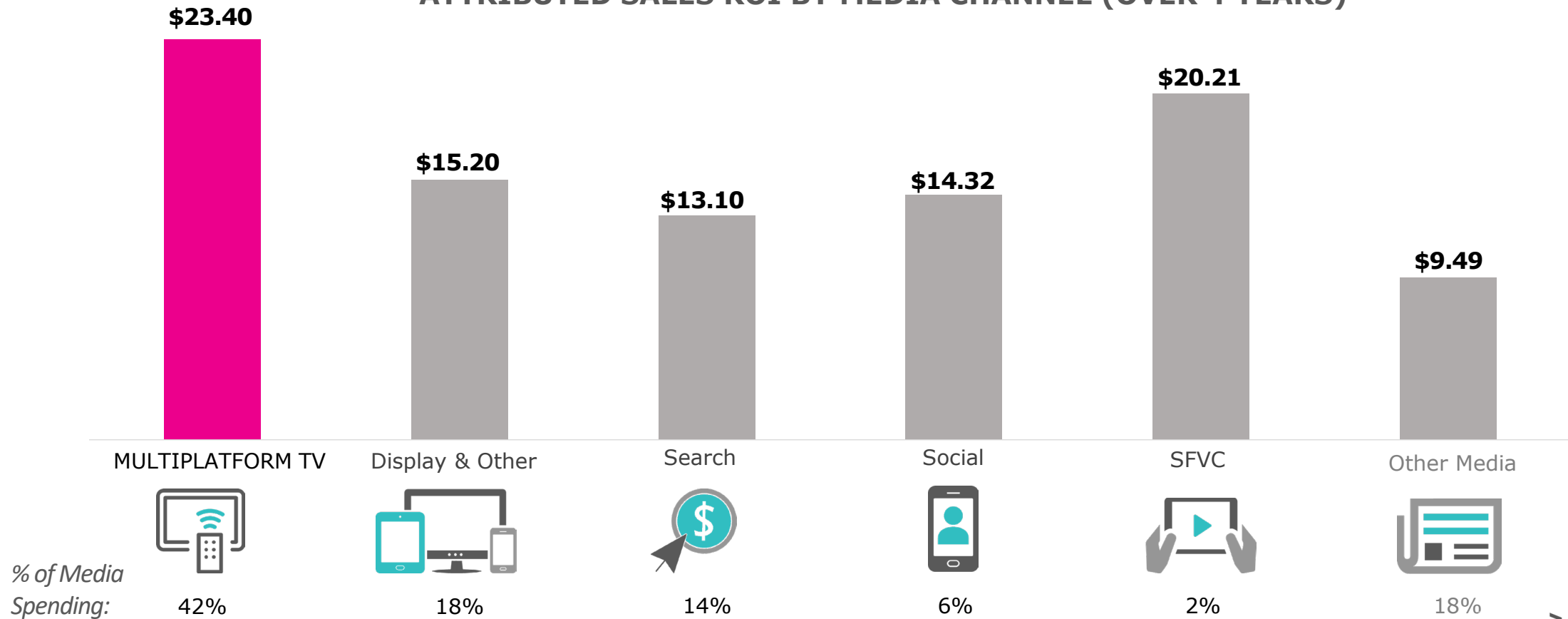


% of Media
Spending:

tv delivers the best ROI

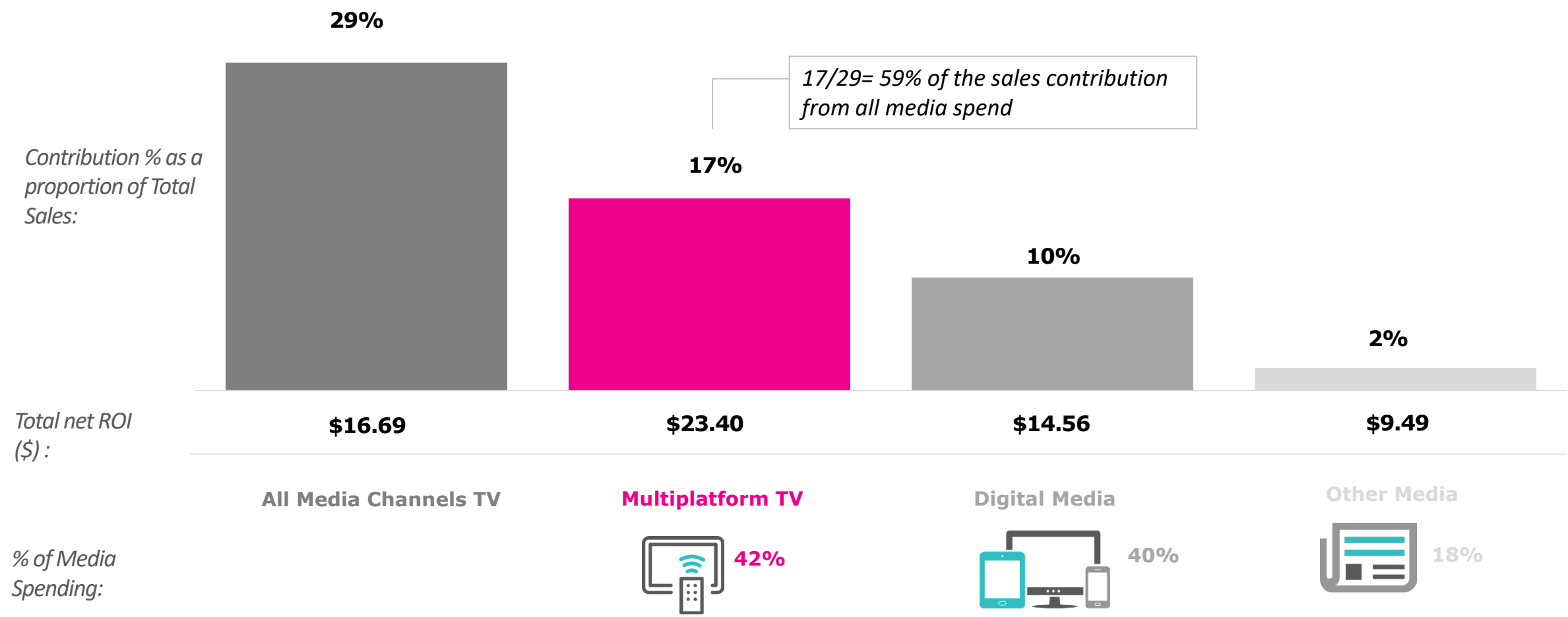
In the long term, TV's ROI grows to \$23.40

ATTRIBUTED SALES ROI BY MEDIA CHANNEL (OVER 4 YEARS)





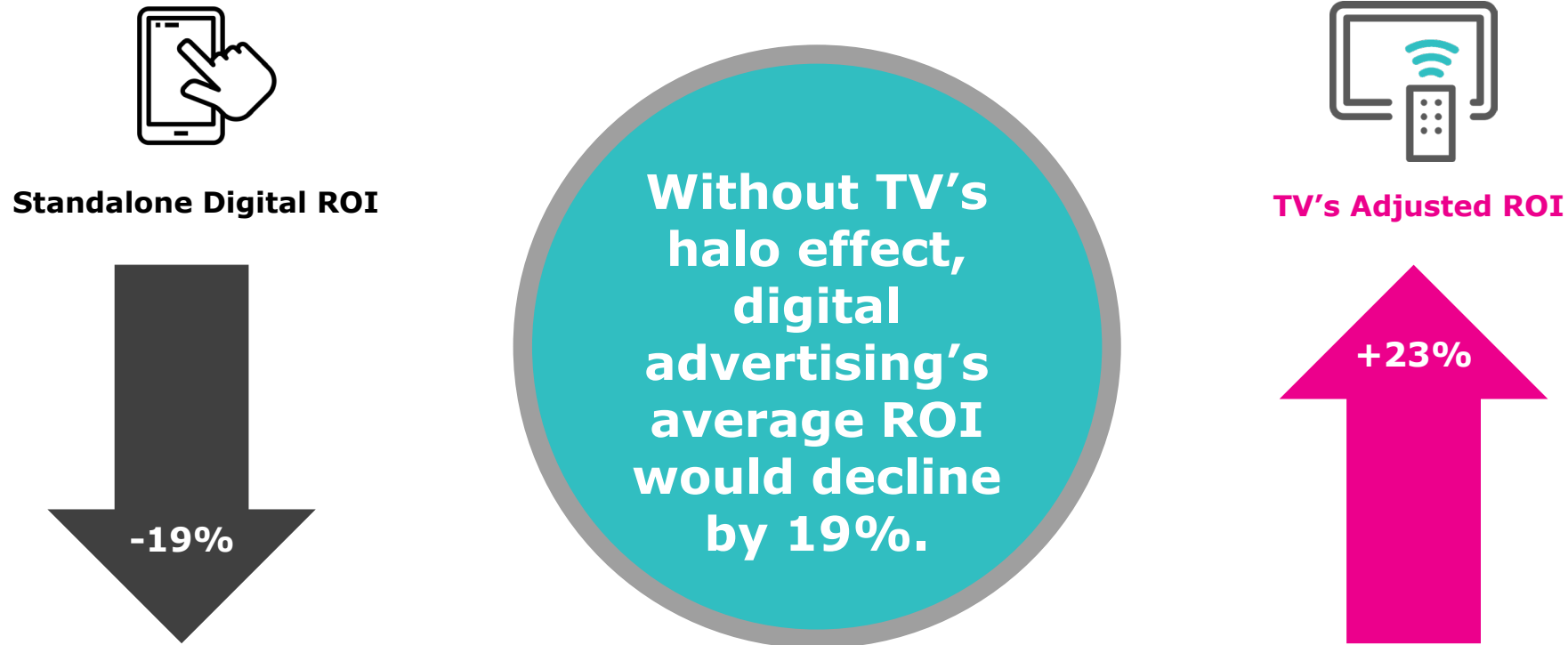
Represents 42% of spend, but 58% of the sales contribution from the media



Source Accenture: [Peak Performance: Driving Advertising Effectiveness That Lasts](#)

tv improves digital's performance

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





You must have TV in your consideration set ... TV continues to represent a significant majority slice of video for most demographics.

Mark Ritson
Marketing & Branding Expert, Columnist, Consultant and Professor

summary



tv's key attributes



100% viewable



Robust measurement



Full screen



Brand safe



Sound on



Shared viewing








Viewed by humans



High quality programming

tv's winning formula

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

in case you missed it

Check out these additional [research reports](#)

The ongoing evolution of marketing

In this animated, applied, and occasionally provocative session, Mark Ritson reviews the rather dramatic changes taking place across the face of marketing.

[learn more »](#)

creative drivers of effectiveness

Simon Tunstill of Thinkbox shares the findings of a new UK study that examines the realm of TV advertising creative and its profound impact on memory, all through the perspective of cutting-edge neuroscience.

[learn more »](#)

ad nation

New research, conducted by Ipsos, examines the media habits and advertising perceptions of industry professionals and ordinary Canadians and highlights the differences between the two groups.

[learn more »](#)

metrics that matter: a Canadian brand lift study

TV has been proven to drive a range of business results, from top-of-the funnel brand building to bottom funnel sales activations. In this study, we've tracked how TV advertising impacts a number of critical brand metrics, like Awareness, Consideration and Value.

[learn more »](#)

peak performance: advertising effectiveness that lasts

Accenture assessed \$700M+ of media spend in Canada, covering 105 brands across four verticals. The research clearly outlines the ways different advertising channels impact sales, what that impact is in the short and long-term, and how TV and digital work together.

[learn more »](#)

target the (whole) market

Byron Sharp famously challenged a number of traditionally held beliefs in his ground-breaking book 'How Brands Grow'. We commissioned MediaCom Business Science to examine Sharp's best practices and how they apply in Canada.

[learn more »](#)

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