

105 million hours

time spent with tv yesterday

85%
Canadians
2+
tv's weekly reach











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

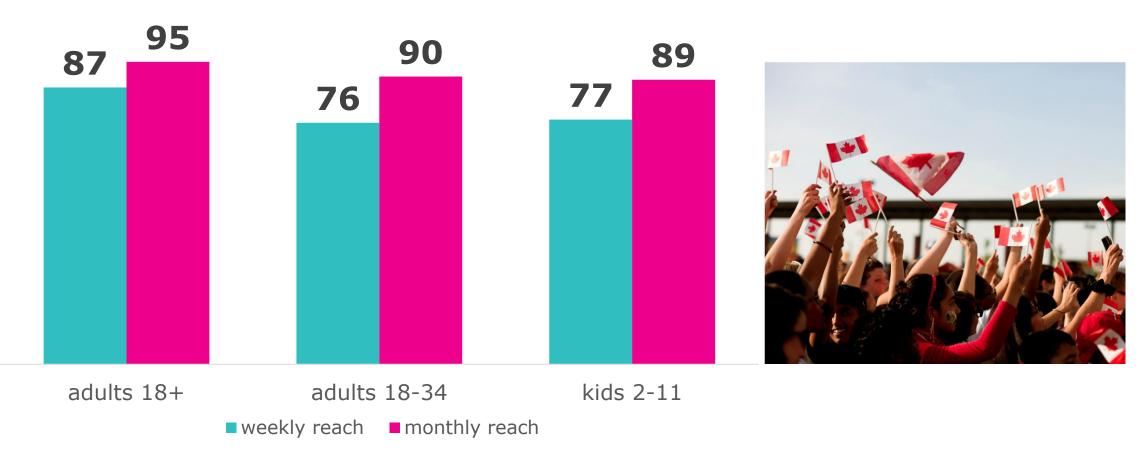
This makes planning for reach the foundation of any sound media strategy.

Byron Sharp Professor of Marketing Science, University of South Australia



tv reaches 85% of Canadians 2+

every week





Total Canada | Fall 2021

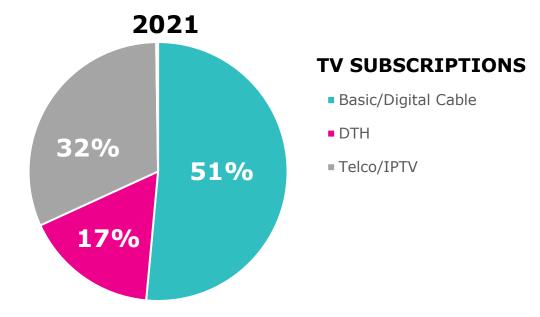
10.3 million Canadian HH's have

a paid tv subscription

Cord cutting has been far overstated: total subs are down less than 1%.

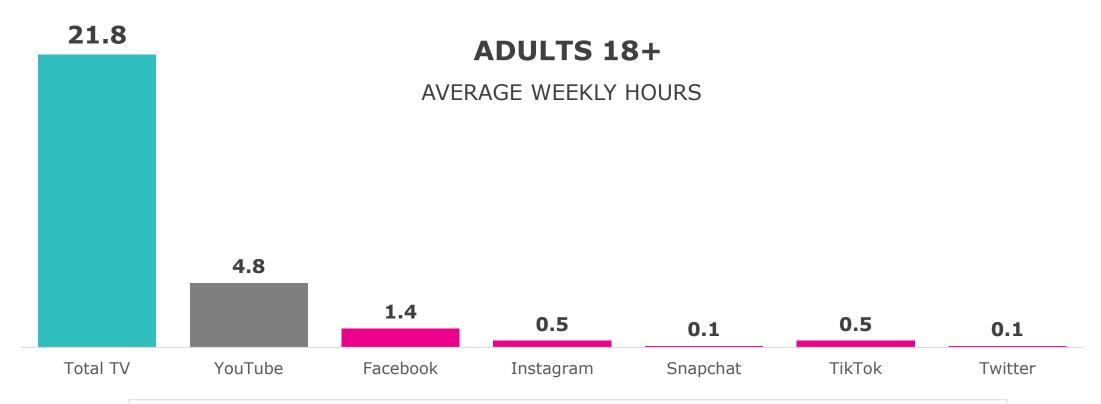
The notion that "no millennials subscribe to TV" is also false: **62% of 18-34 year olds subscribe to TV**, and they're also accessing linear TV out-of-home and via streaming (which is how TV is able to reach 78% of A18-34 on a weekly basis).

	Sept '20	Sept '21	Index
Total Subscribers	10,478,979	10,341,772	99
Basic/Digital Cable	5,586,917	5,322,797	95
Satellite	1,858,394	1,727,265	93
Telco/IPTV	3,009,727	3,267,769	109
Other	23,941	23,941	100





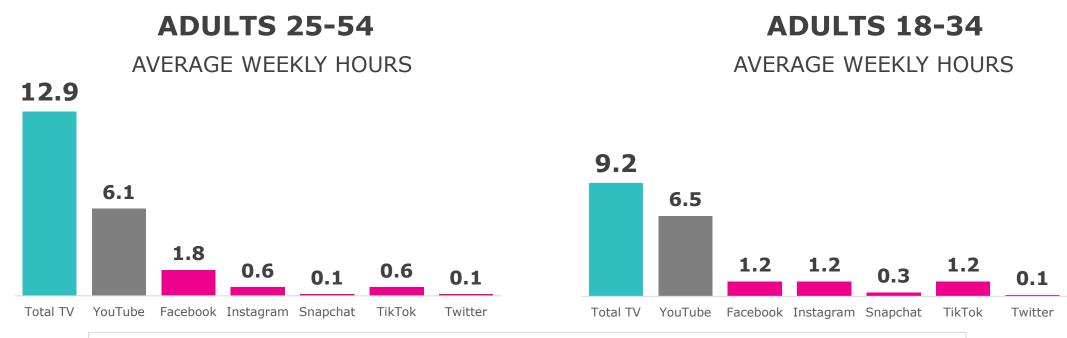
Canadians watch a lot of tv



Total TV = viewing to broadcaster linear TV plus any broadcaster content that is live streamed on other platforms with the linear commercial load intact. Does not include streaming to OTT services.



Canadians watch a lot of tv

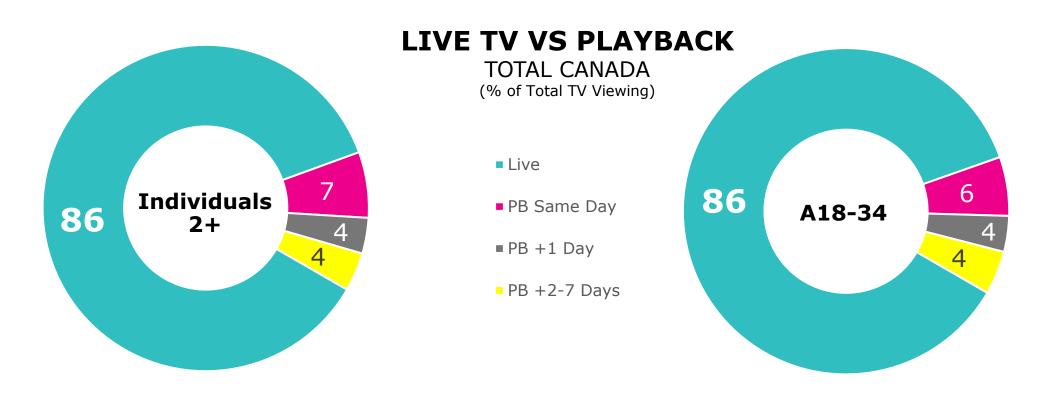


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86% of linear wiewing is live

Even among young adults, 86% of TV viewing is live; 92% is live + same day playback

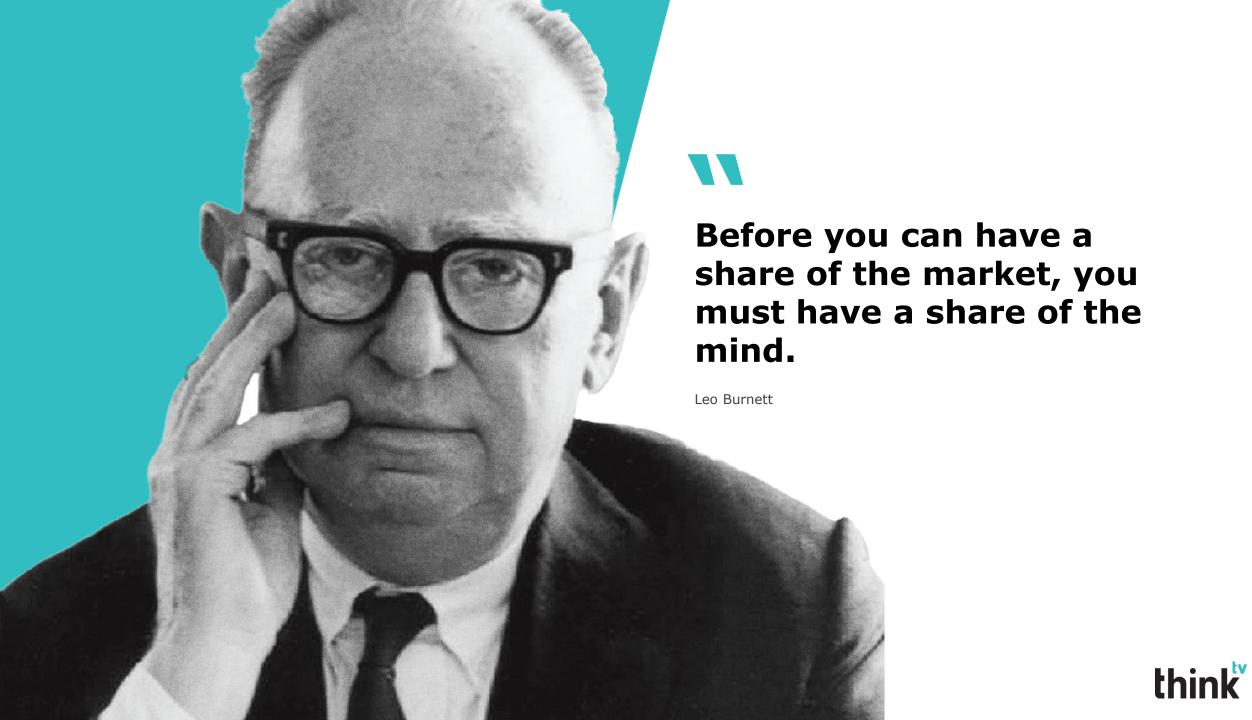


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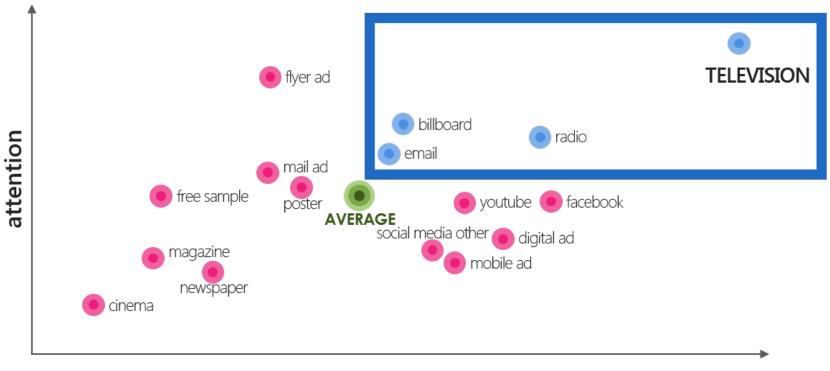






when it comes to exposure & attention

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**.



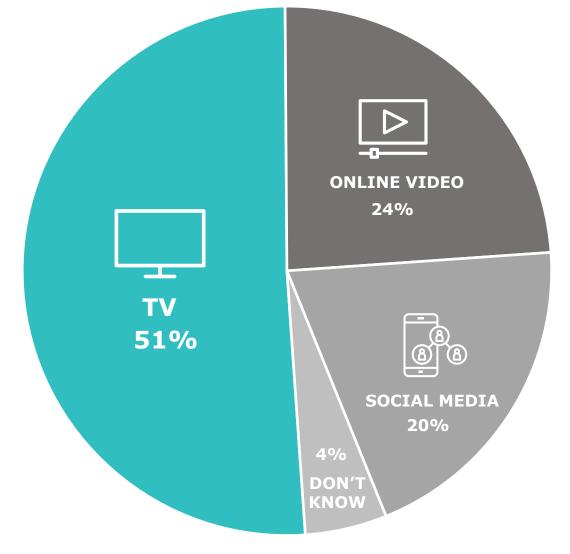


Source: Optimizing vs. Minimizing Media

think

ads get the most attention

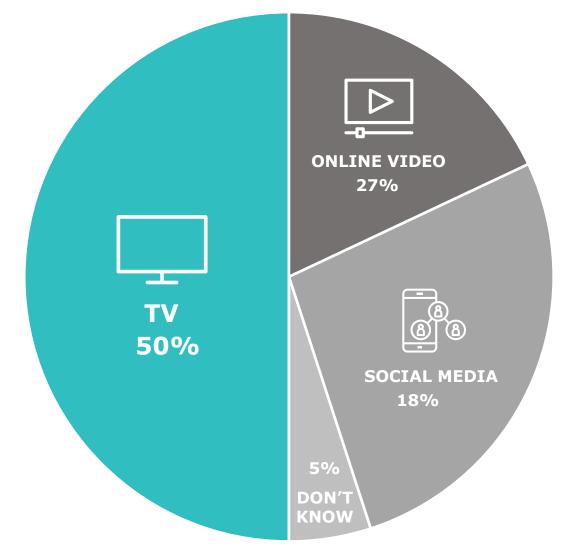
Which one of the following media carries video advertising that best captures your attention?





tv ads are the most influential

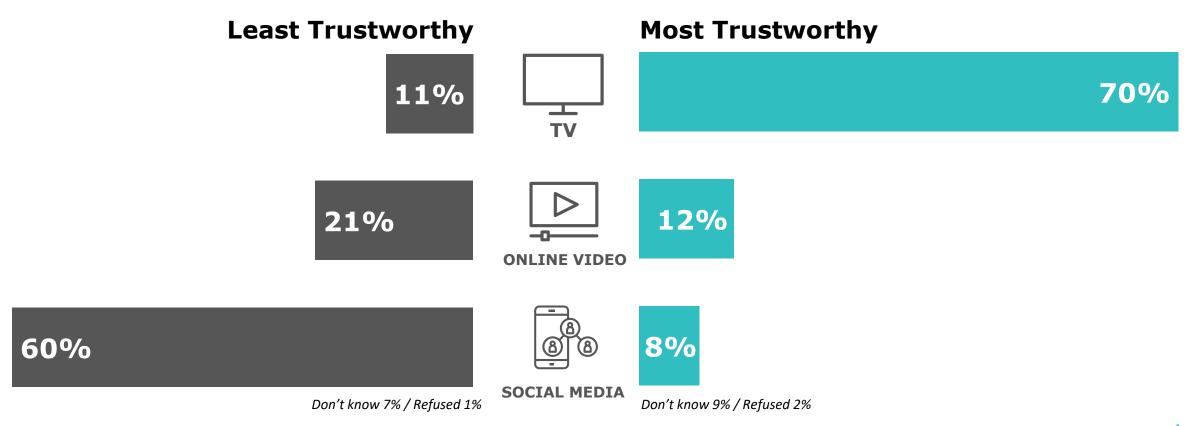
Which one of the following media carries video advertising that you believe to be the most influential?





is also the most trusted medium

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



is most trusted across all demos

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

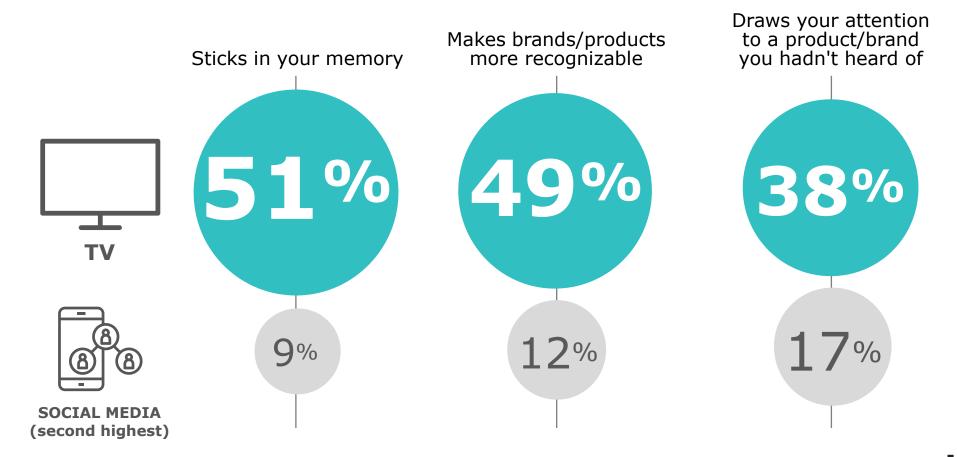
MOST TRUSTWORTHY 70% 60% 12% ONLINE VIDEO 12% 8% 8 Adults 18+ Adults 18-34



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

w advertising has significant impact

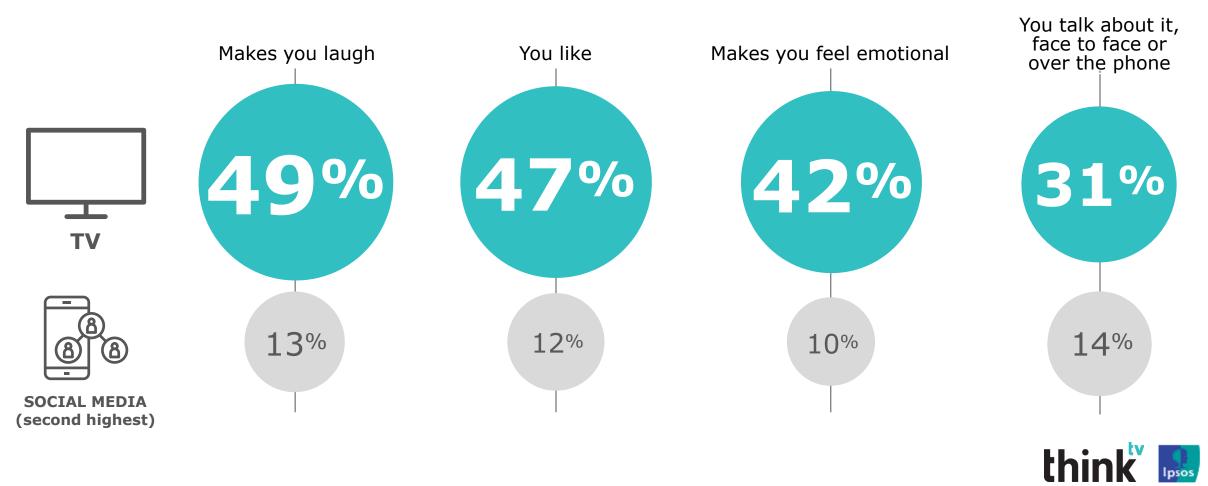
In which of the following media are you most likely to find advertising that...?





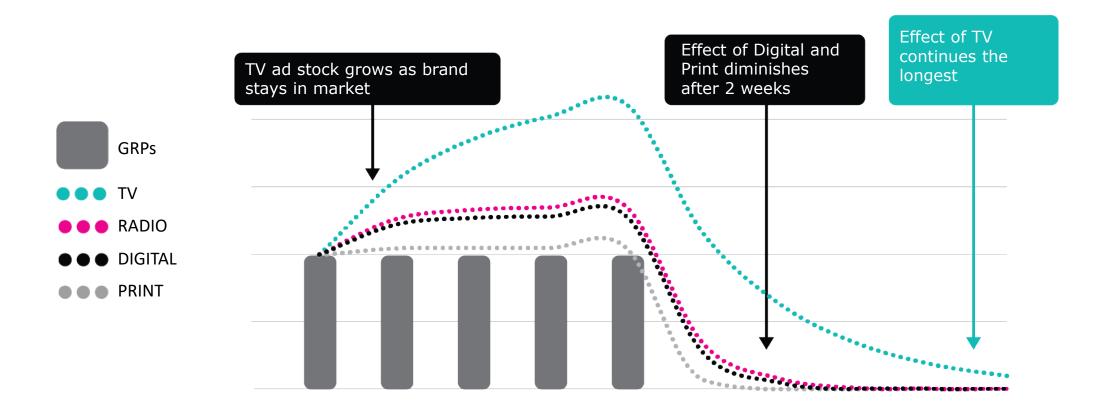
advertising is the most likely to generate emotion and conversation

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



digital companies know tv works!

TV spend by internet-related products & services* is **up over 1.8x** since 2016

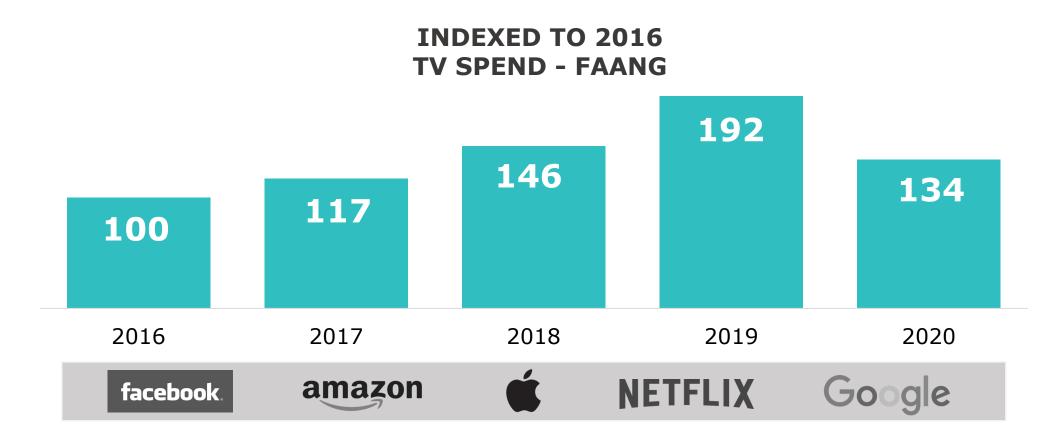
INDEXED TO 2016 TV SPEND BY INTERNET BUSINESSES





FAANG continues to invest in

The pandemic negatively impacted FAANG's investment on TV, although spend is up 34% compared to 2016



top 10 w spenders in Canada 2020

The "FAANG" group of companies together were the #2 TV advertiser in 2020

Rank	Company
1	P&G
2	FAANG
3	Provincial Government Lotteries
4	Restaurant Brands International
5	McDonald's
6	Johnson & Johnson
7	General Motors
8	PepsiCo
9	Leon's Furniture
10	Government of Canada































Source: Total Canada/Annual/Numerator Canada

Wayfair used tv

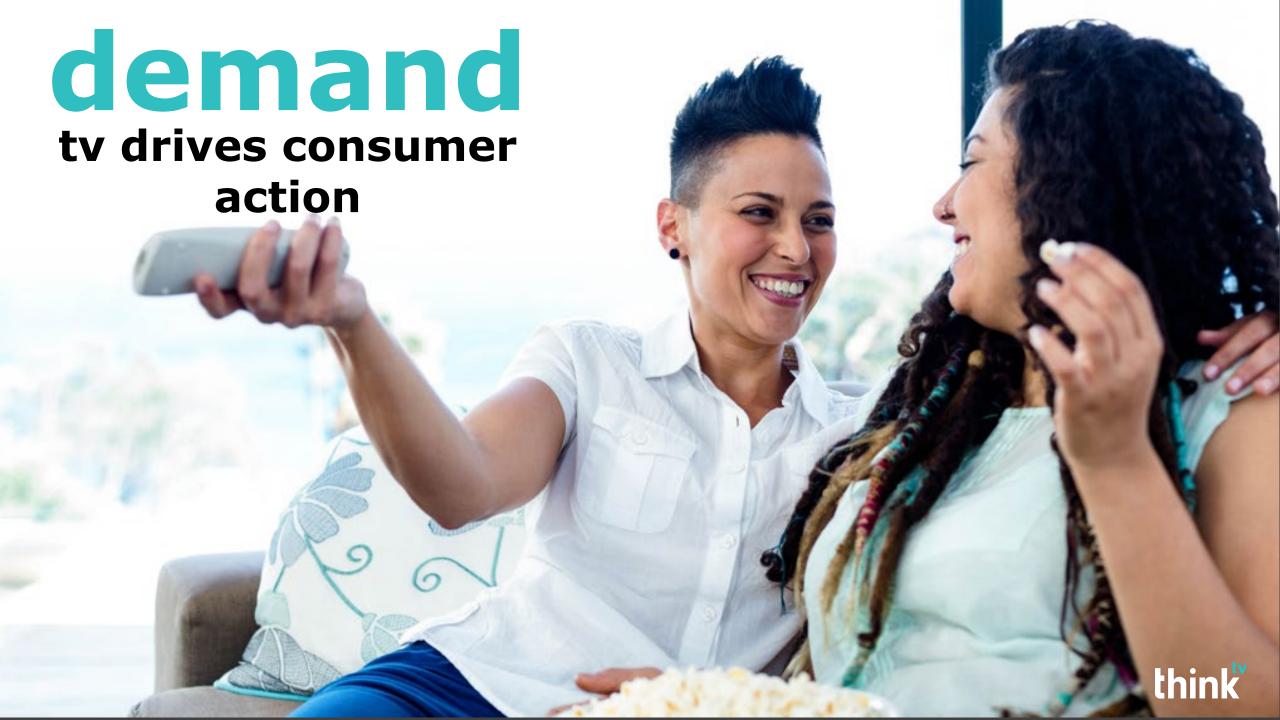
to drive their business to the next level





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



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







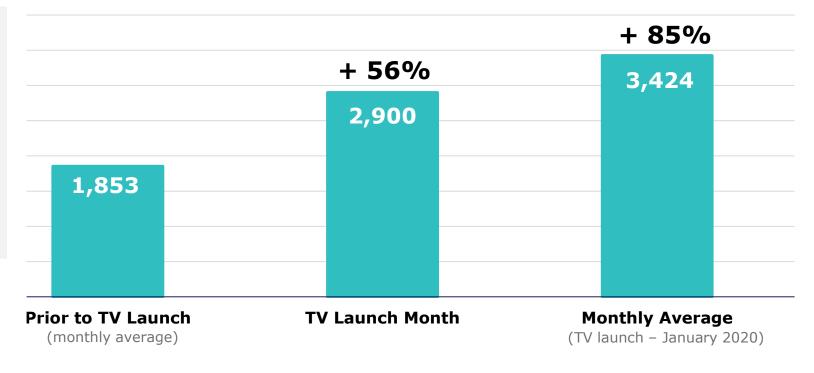
of both established and emerging companies

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.



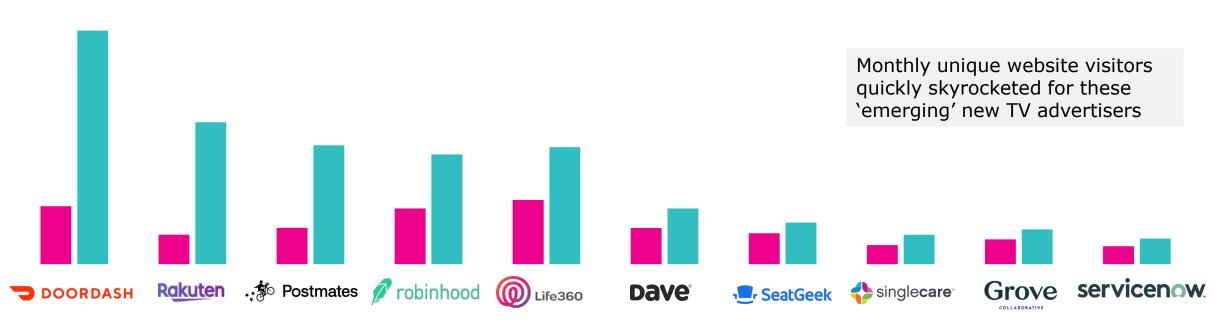


tv drives the growth

of both established and emerging companies

MONTHLY WEBSITE UNIQUE VISITORS (000) COMPARISON

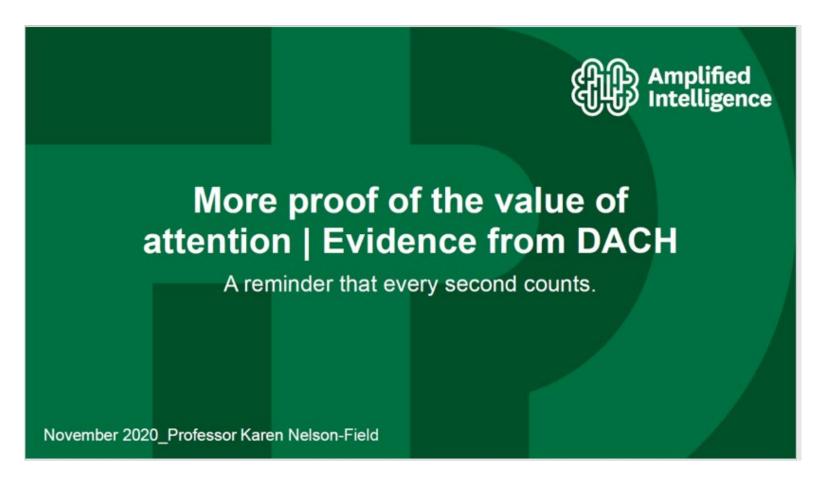
Based Over a Four-Year Time Period: Jan '16 – Jan '20



■ Prior to TV Launch ■ TV Launch - Jan '20



attention drives demand: Karen Nelson-Field



an excerpt





What is this study?



Germany/Switzerland/Austria considering cross-platform performance against attributes that matter

AD CUT THROUGH

Via Attention

SALES UPLIFT

Via Product Choice





Our Proprietary Gaze Al



Active Attention

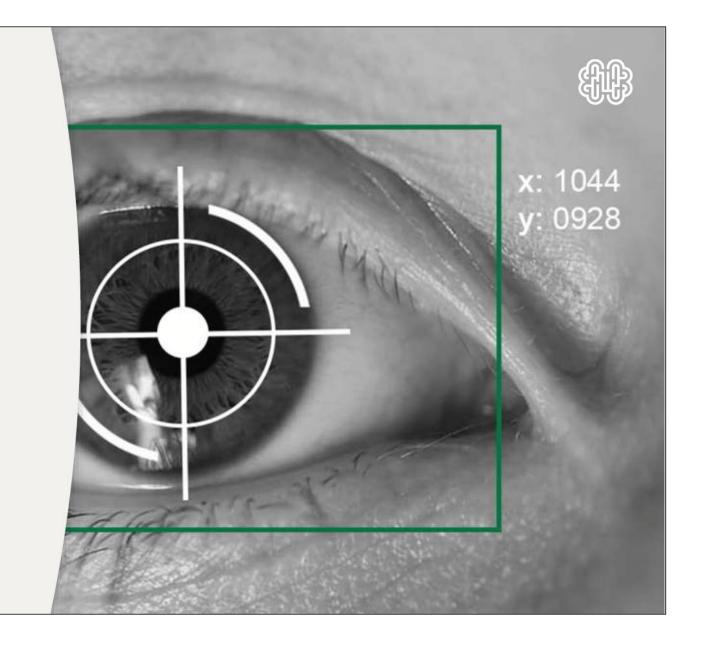


Passive Attention



Non-Attention

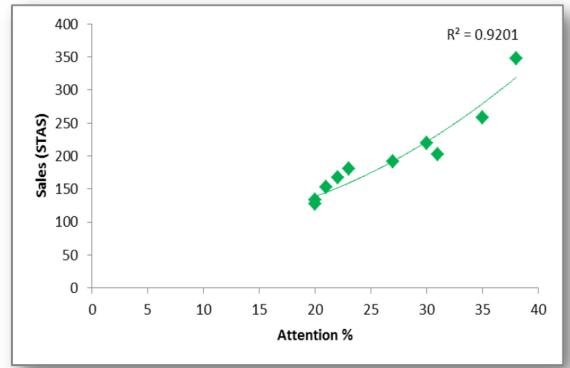
Our gaze delivers an unparalleled measure of continuous granular attention.







Attention and Product Choice are Closely Related



The more attention an ad generates, the more impact it has on generating a favourable sales outcome









In an Average Ad Second, TV 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

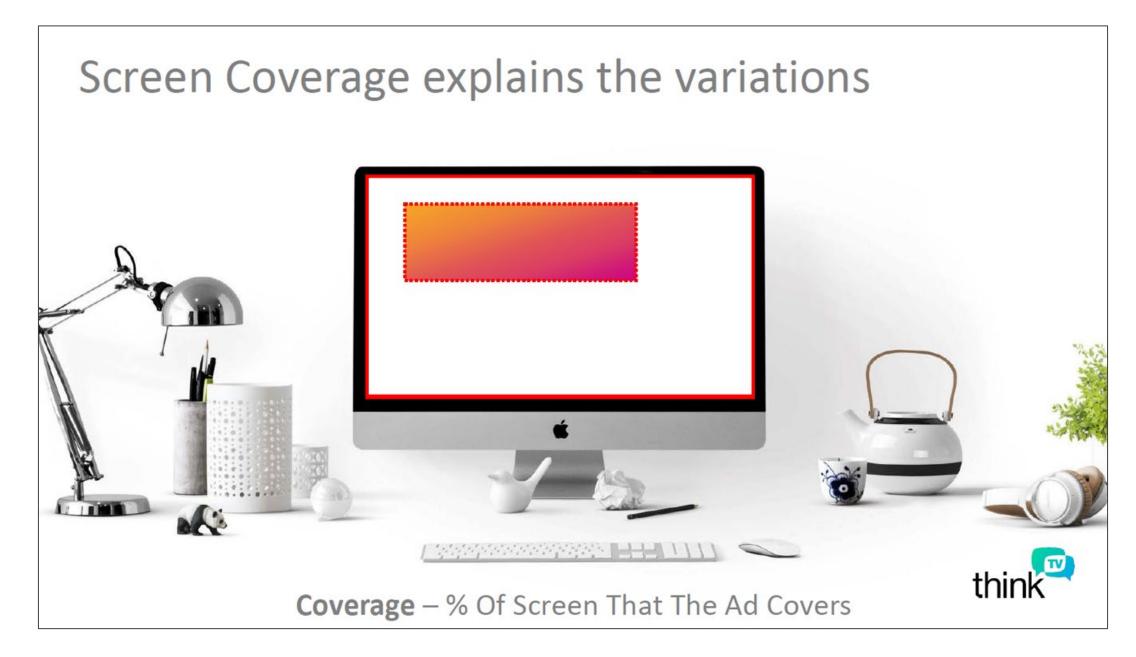
	AS SEEN ON	<u> </u>	
Active Avoidance	2%	2%	32%
Passive Watching	40%	94%	37%
Active Watching	58%	4%	31%















TV delivers more active attention seconds.



	STAS Index	Attention Index
BVOD (Mobile)	138	1.00
TV on TV	129	0.71
YouTube	112	0.47
Instagram	105	0.46
Facebook	100	0.29

Reflected as an index, where 1.00 is highest performer in terms of number of seconds.

(r = .97, p = < .005)





TV delivers more sales uplift than any other platform.



	STAS Index
BVOD (Mobile)	138
TV on TV	129
YouTube	112
Instagram	105
Facebook	100

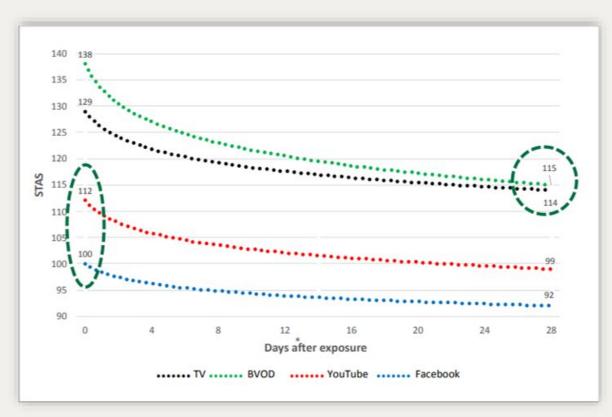
TV, regardless of device, drives more sales uplift than any other platform





Length of time that a TV ad impacts sales far exceeds any other platform.





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

*BVOD Modelled





TV generates more attention and sales uplift



Length of time that a TV ad impacts sales far exceeds any other platform

TV ads are up to 3x longer in view



These are not once-off findings, these results are generalisable across many countries.





Key Takeaways

- Attention and sales are strongly correlated
- TV commands 2x as much active attention as YouTube and 14x that of Facebook
- With the same creative executions tested, TV generates a greater sales impact
- Sponsorship in quality programming improves attention and sales
- All broadcast content has a greater sales impact than other platforms
- TV screen coverage is about 3x Youtube and 10x Facebook
- Inventory playing full screen will have a greater sales impact than ads playing on a smaller proportion of the screen







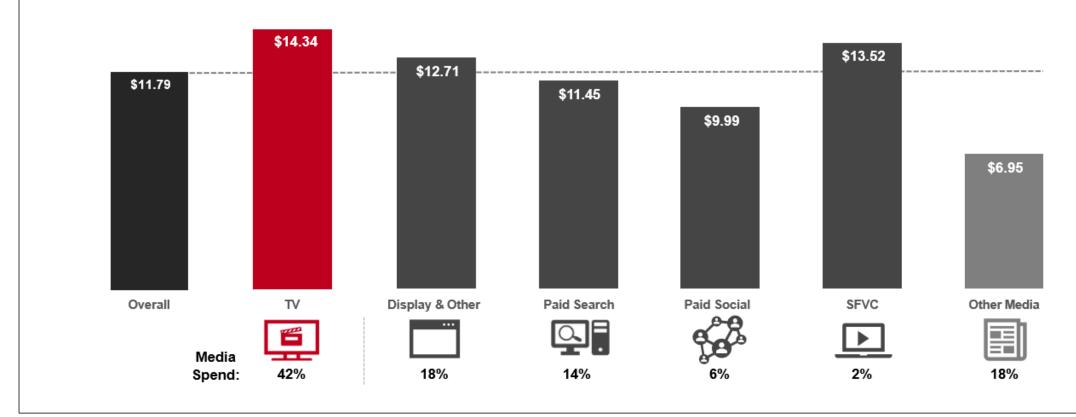






TV HAS THE HIGHEST ROI OF ALL MEDIA

ATTRIBUTED SALES ROI BY MEDIA CHANNEL (OVER 12 MONTH PERIOD)

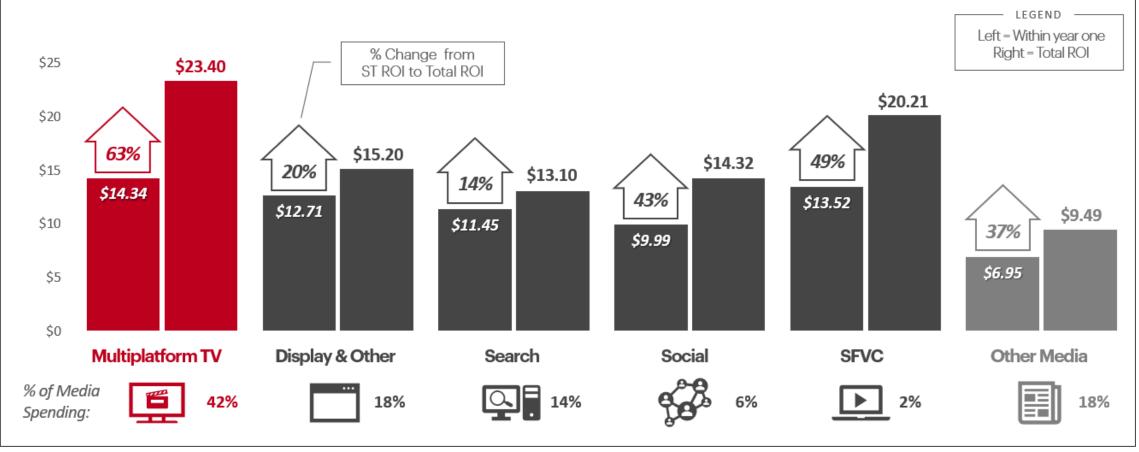


Source: Canadian Media Attribution Study





4-YR ROI OF MULTIPLATFORM TV IS 77% HIGHER THAN THE AVERAGE OF ALL OTHER CHANNELS

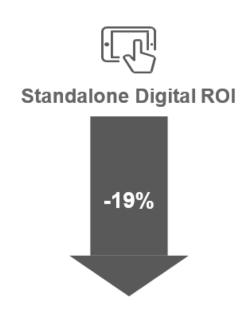


Source: Peak Performance: Driving Advertising Effectiveness That Lasts



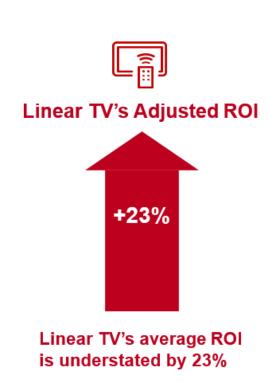


TV HAS A SIGNIFICANT HALO EFFECT ON DIGITAL MEDIA, INCREASING ITS SALES ROI BY 19%



Without Linear TV's halo, digital advertising's average ROI would decline by 19% Linear TV's Halo
On Digital Advertising

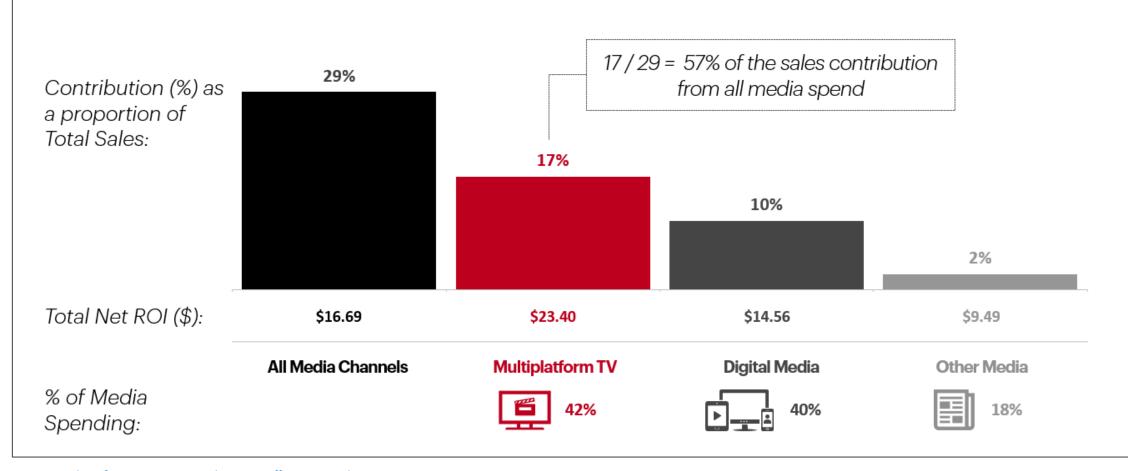
Impact of Linear TV
advertising on Digital
within integrated
advertising campaigns



Source: Canadian Media Attribution Study



TV REPRESENTS 42% OF SPEND, BUT 57% OF THE SALES CONTRIBUTION FROM MEDIA

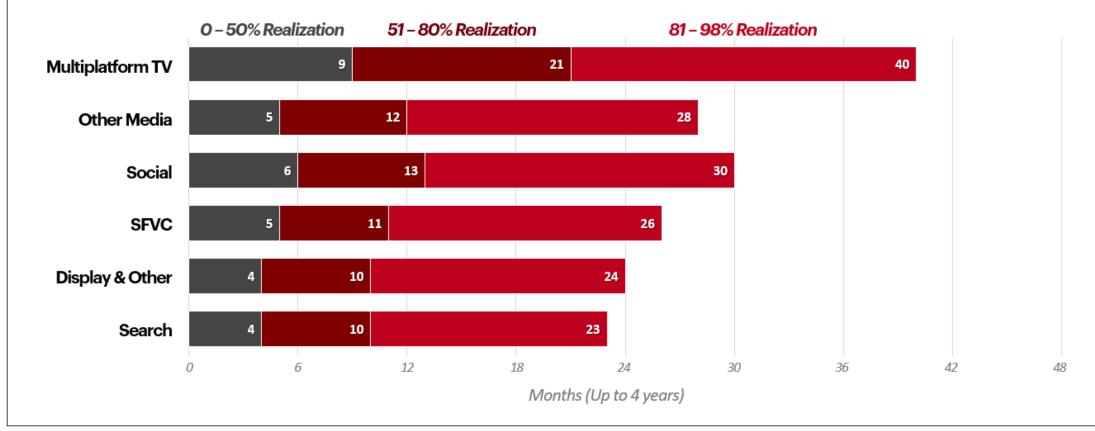


Source: Peak Performance: Driving Advertising Effectiveness That Lasts





MULTIPLATFORM TV HAS THE LONGEST-LASTING SALES IMPACT AT 40 MONTHS



Source: Peak Performance: Driving Advertising Effectiveness That Lasts









As a company that sells to 2 billion plus consumers a day on an annualised basis, we look at TV to provide levels of reach. [TV's] high levels of reach make it very cost effective.

Richard Brooke Global Media Operation Director, Unilever





's key attributes



100% viewable



Robust measurement



Full screen



Brand safe



Sound on



Shared viewing



Viewed by humans



High quality programming



's winning formula



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 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 »

ad nation Ipsos Canada

This new research, conducted by Ipsos and commissioned by think**tv**, identifies how the media habits of the advertising and media communities differ from the rest of Canada, and how those differences impact our assumptions of general media usage.

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 »

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 »

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 »

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



@thinktvca





thinktv.ca

sources

Slides 2, 3, 6, 8: Numeris, PPM, Total Canada, Consolidated, All Locations, Mo-Su 2a-2a, Sept 13 to Dec 19, 2021

Slide 4: TV campaign based on a 900 GRP campaign (6 weeks x150 GRPs), Sept 13 to Dec 19, 2021, Total Canada, Ind. 2+, Numeris 2020-21 pop est.

Slide 8: Television: Numeris PPM, Total Canada, Total TV, Consolidated, All Locations, A18+, M-Su 2a-2a, Sept 13 to Dec 19, 2021

Internet (Daily Reach), Radio, Daily Newspaper, Magazine: Numeris RTS, Canada, Spring 2021

Internet (Weekly Hours): comScore Media Metrix; Multi-Platform; Sept to Nov 2021 (Note: Numeris pop est. used to calculate average weekly hours

per capital).

Slide 9: Mediastats, Total Canada, Sept 2020, Sept 2021, BDU Profile Report, CTAM 2020, Numeris, PPM, Total Canada, Total TV, All Locations, M-Su 2a-2a, Sept 13,

to Dec 19, 2021

Slides 10,13: Television: Numeris PPM, Total Canada, Total TV, Consolidated, All Locations, Ind 2+, M-Su 2a-2a, Sept 13 to Dec 19, 2021 | Facebook.com,

Instagram.com, Twitter.com, TikTok.com, Snapchat, Inc.: comScore Media Metrix Multi-Platform, Canada, Sept to Nov 2021 | YouTube: comScore Video Metrix MultiPlatform, Canada, Sept to Nov 2021 | (Note: Numeris population estimates used to calculate average weekly hours per capita for

digital media)

Slide 12: Numeris PPM, Total Canada, Total TV, All Locations, M-Su 2a-2a, Sept 13 to Dec 19, 2021. PB = Playback

Slide 13: Mark Ritson on COVID, advertising during a recession, and the impact of TV, webinar, 2020

Slide 16: Ipsos Media TIPs Study, <u>Optimizing vs Minimizing Media</u> August 2018

Slides 17-20: thinktv, nlogic, omniVu, National, Feb 2020 (Don't Know/Refuse not included): Attention in Advertising

Slides 21-22: Ipsos *Ad Nation 2020*

Slide 23: GroupM Canada, 2016; Marketing Mix models across Consumer Electronics, Retail, Finance, Auto and CPG; Target the (Whole) Market

Slides 24-26: Total Canada/Annual/Numerator; for full list of brands please contact thinktv. <u>Online Businesses on TV</u>.

Slides 30, 31: VAB: Direct Effect – Driving Intent for Emerging DTC Brands, 2020

Slides 32-42: Karen Nelson-Field, More Proof of the Value of Attention, 2020; Karen Nelson-Field, Visibility: The Attribute That Really Matters

Slides 44-49: Accenture, Peak Performance: Driving Advertising Effectiveness That Lasts, 2020; The Moneyball Moment for Marketing in Canada, 2019

