

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.

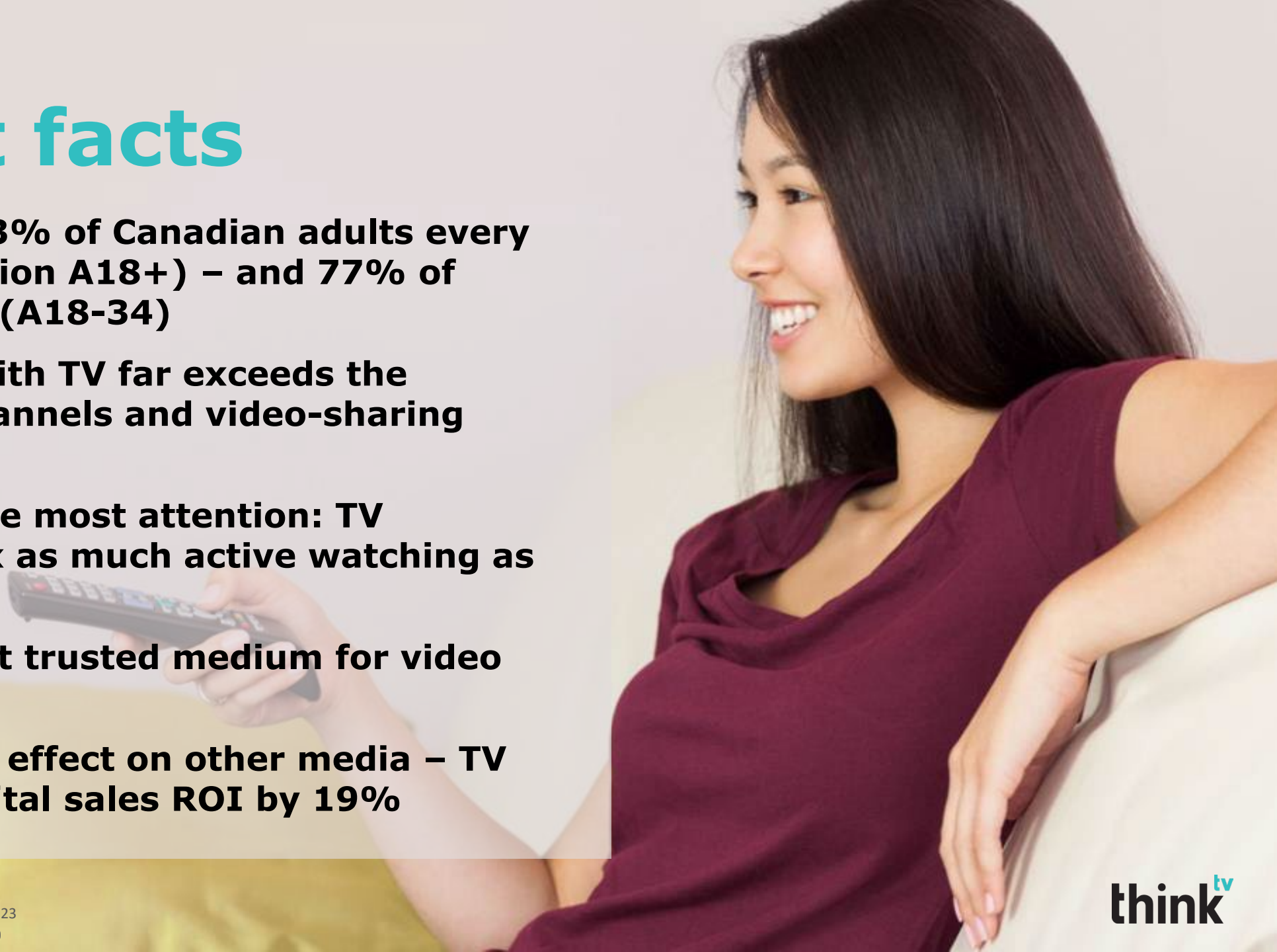
**the power of**



in an attention economy

# tv fast facts

- **TV reaches 83% of Canadian adults every week (27 Million A18+) – and 77% 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**

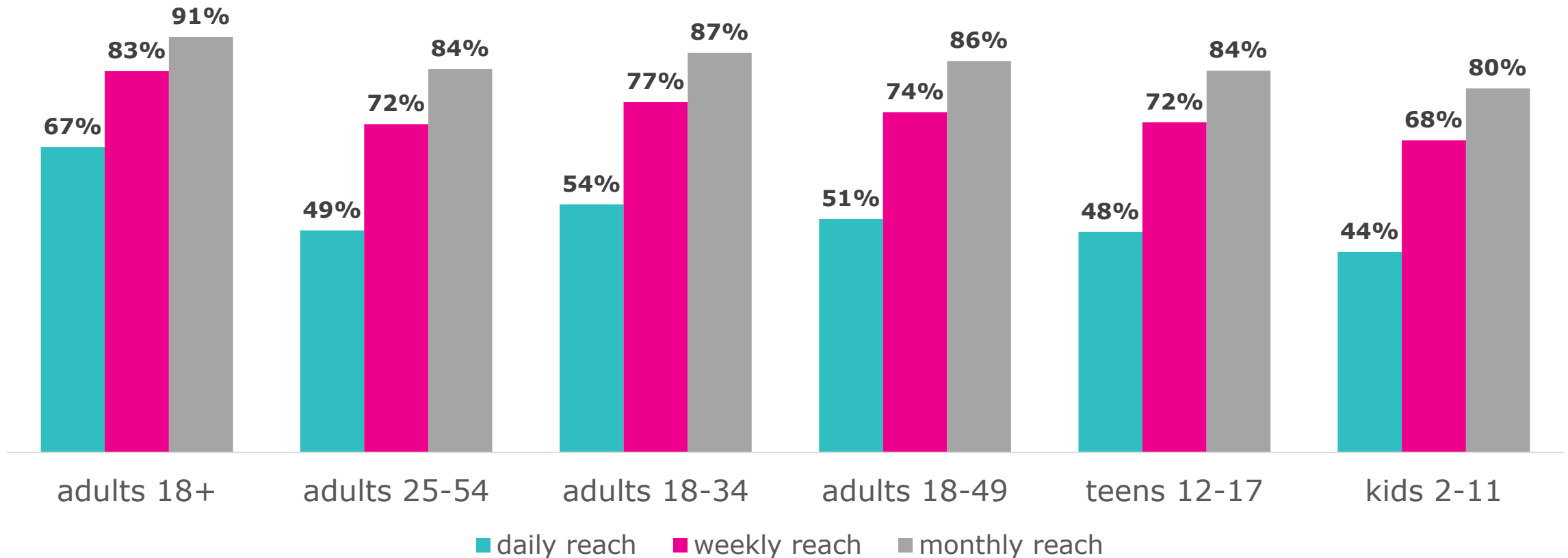
**think**<sup>tv</sup>

A man and a woman are sitting on a couch, smiling and looking towards the camera. The man is holding a red mug and a remote control. The woman is also holding a red mug. They appear to be in a living room setting.

# reach

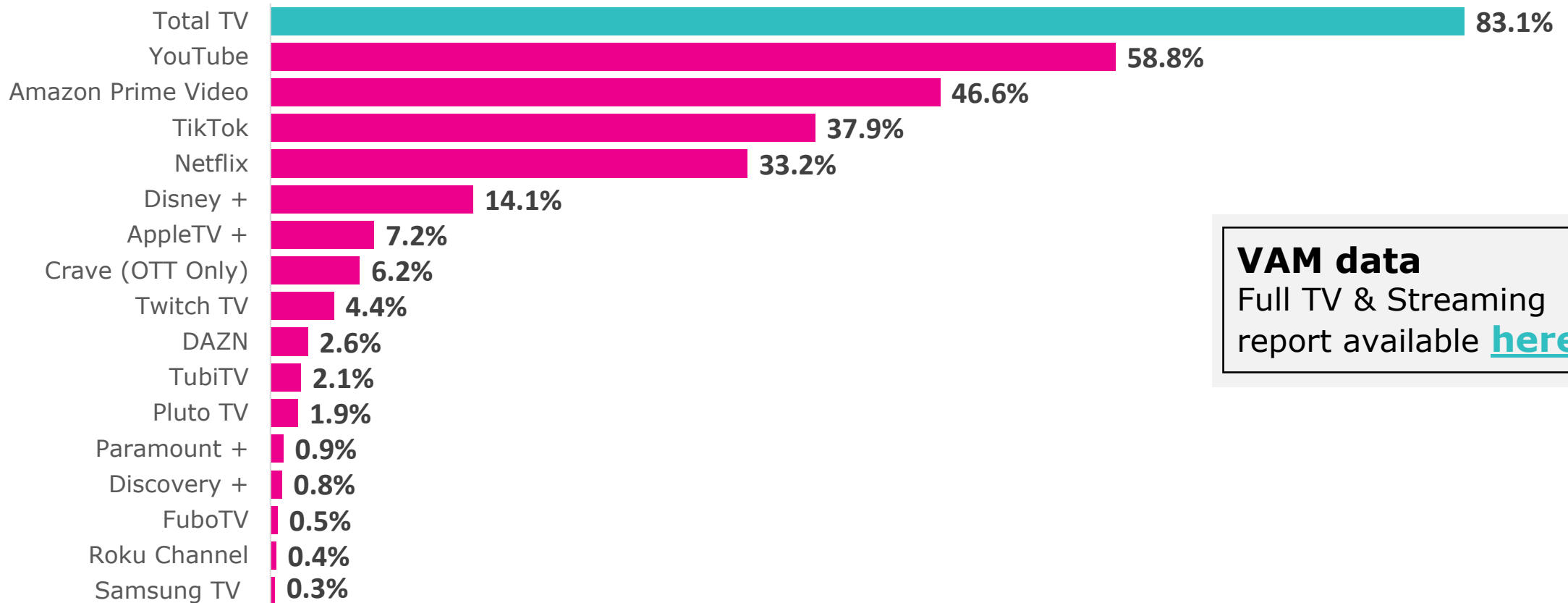
**tv has superior reach**

# **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.**

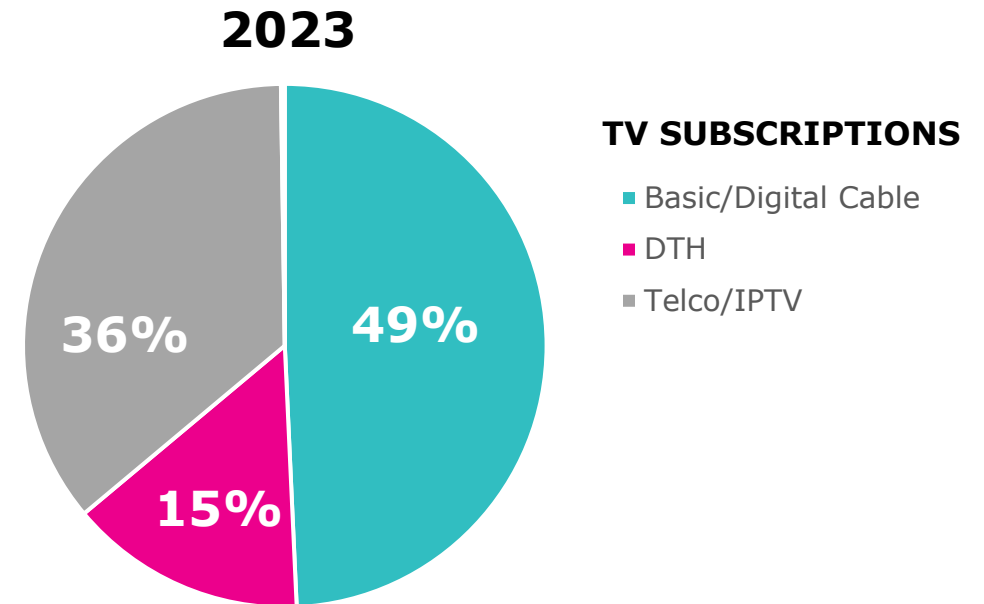
Byron Sharp  
Professor of Marketing Science, University of South Australia

# 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     |
|------------------------|-------------|-----------|-----------|
| <b>Total Paid Subs</b> | 9,976,228   | 9,921,891 | <b>99</b> |
| 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       |

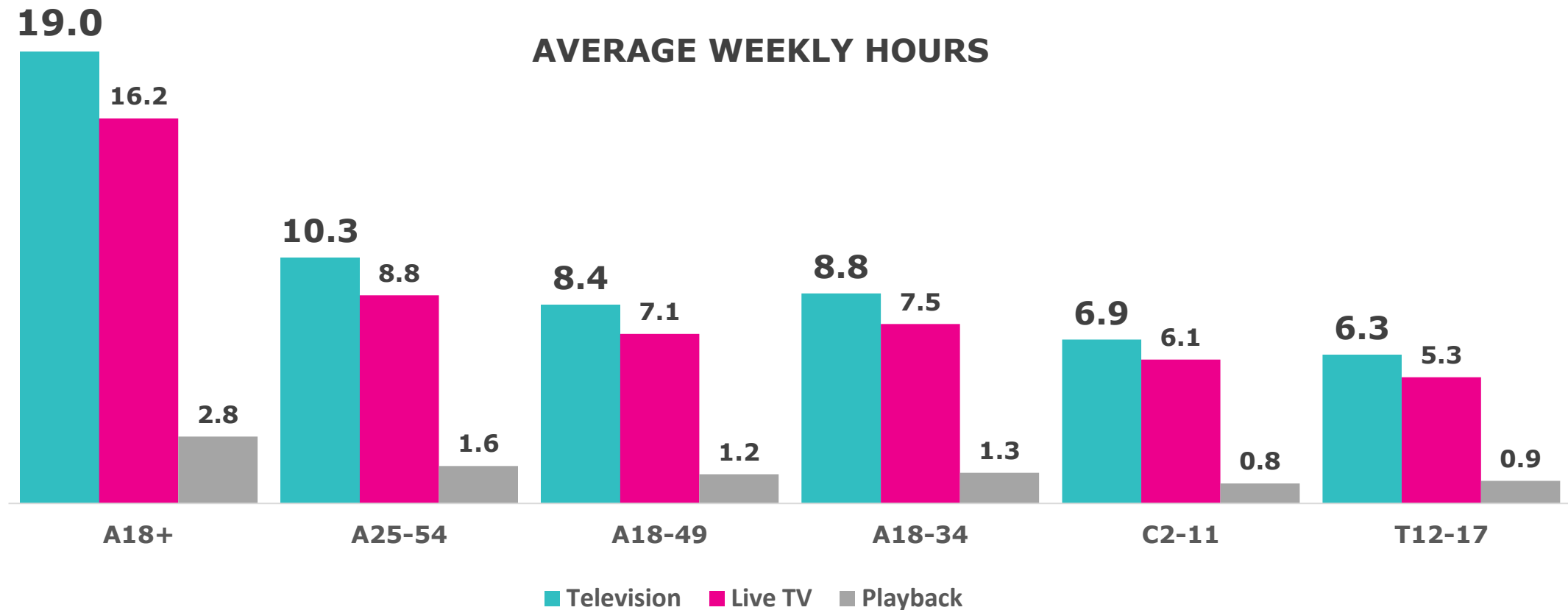




# Canadians watch a lot of



and most of it is live



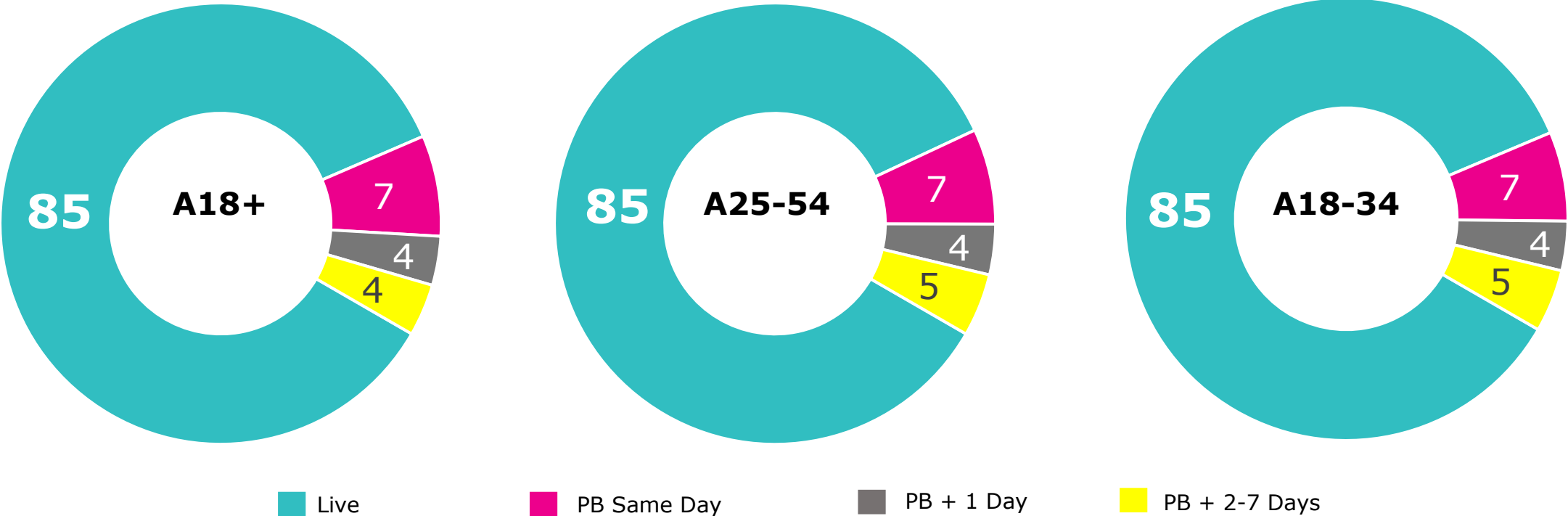
TV = viewing to any live broadcaster content (streamed on any platform and linear TV) plus any broadcaster content recorded on PVR (with commercial load intact) that is viewed within 7 days of initial broadcast. Does not include on demand streaming.

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

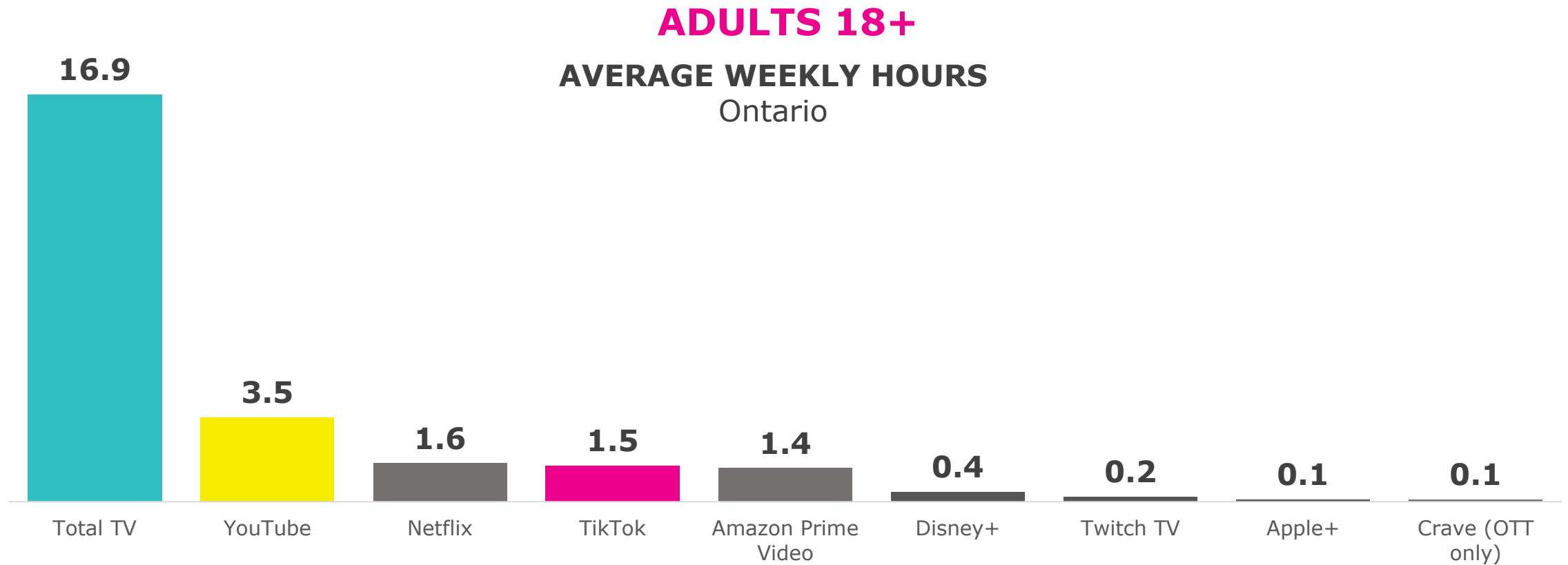
**LIVE TV VS PLAYBACK**  
(% of Total TV Viewing)



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



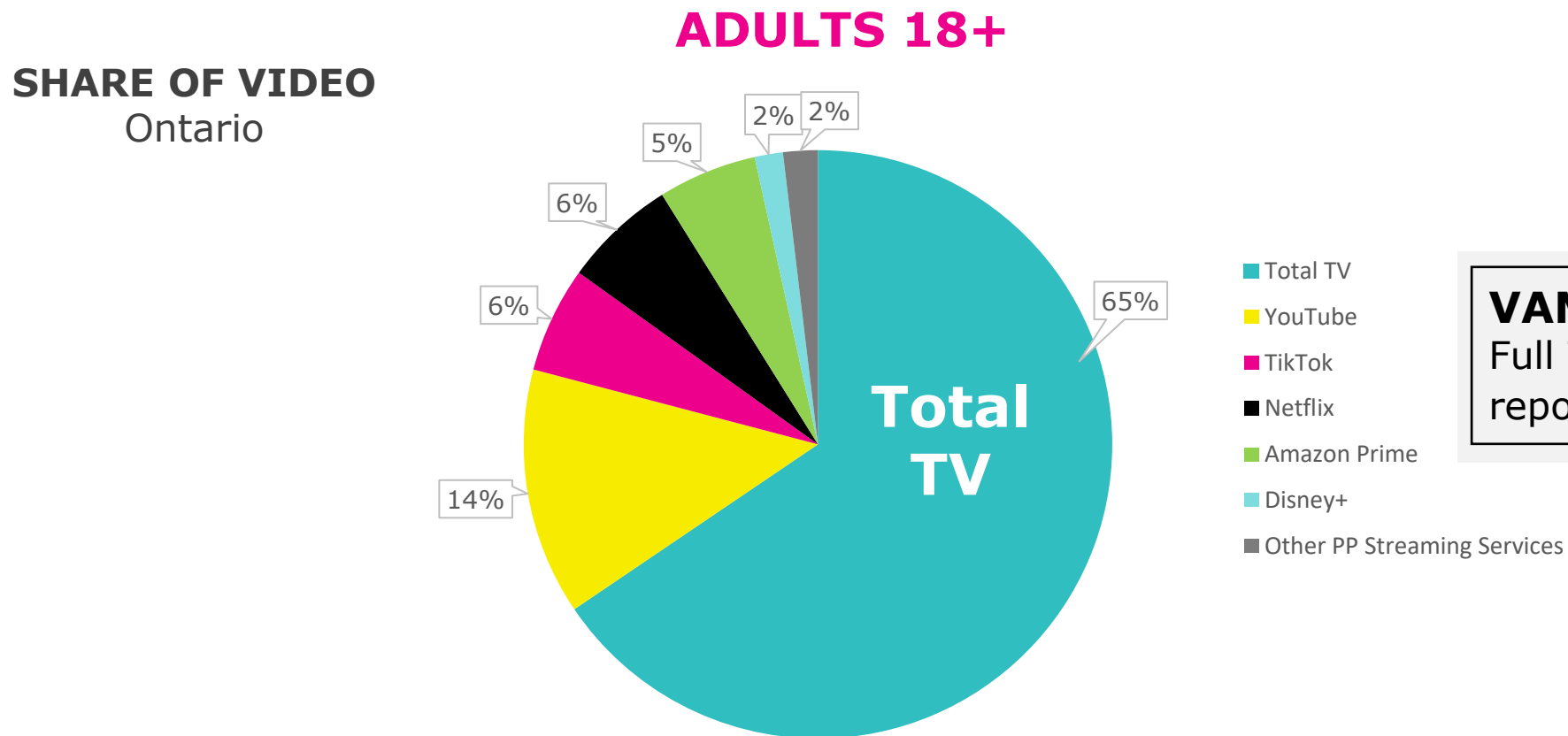
All time spent per capita

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

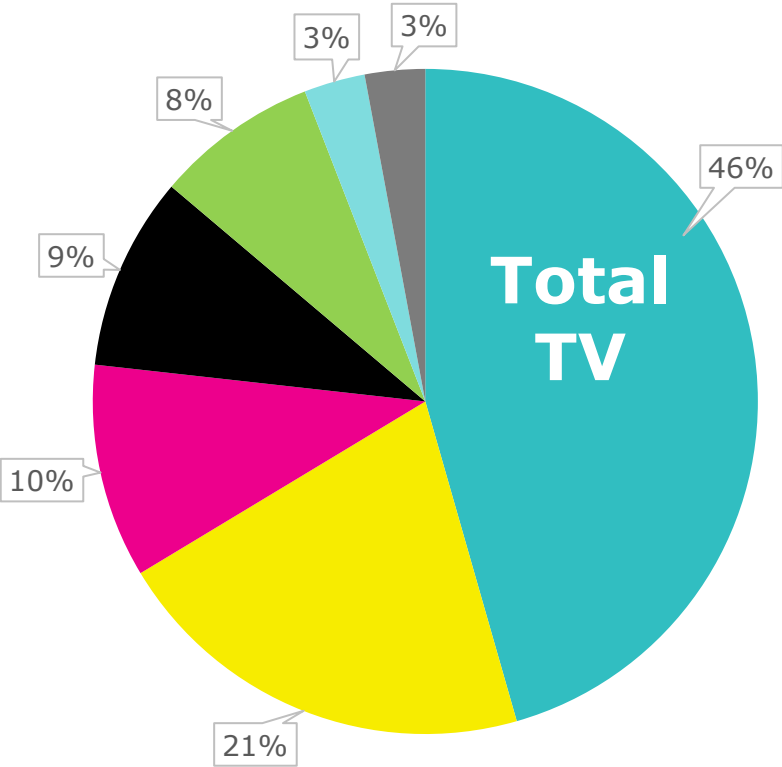
Other Streaming Services includes AppleTV+, CBS News, Club Illico, Crave(OTT Only), Crunchyroll, Daily Motion, DAZN, Discovery Plus, ET Online US, FuboTV, Paramount+, Pluto TV, Roku Channel, Samsung TV Plus, TED, TubiTV, Twitch TV.

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

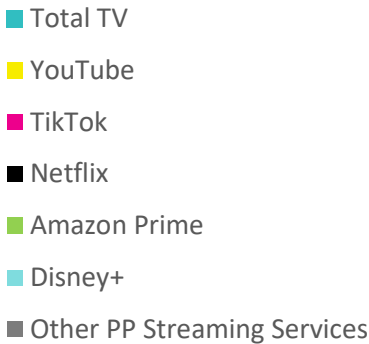


# in all key demos

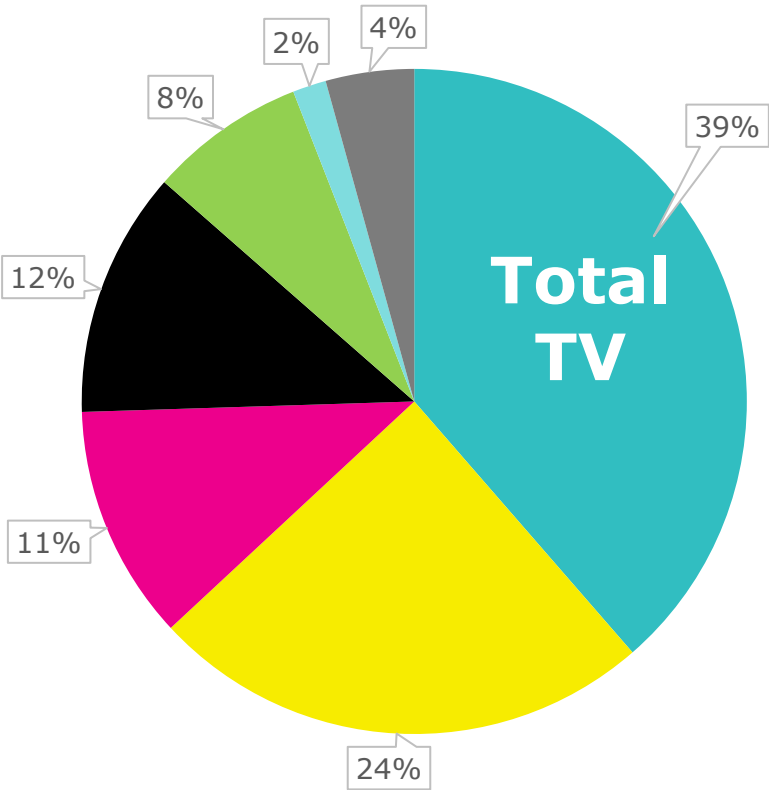
## ADULTS 25-54



## SHARE OF VIDEO Ontario



## ADULTS 18-34



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

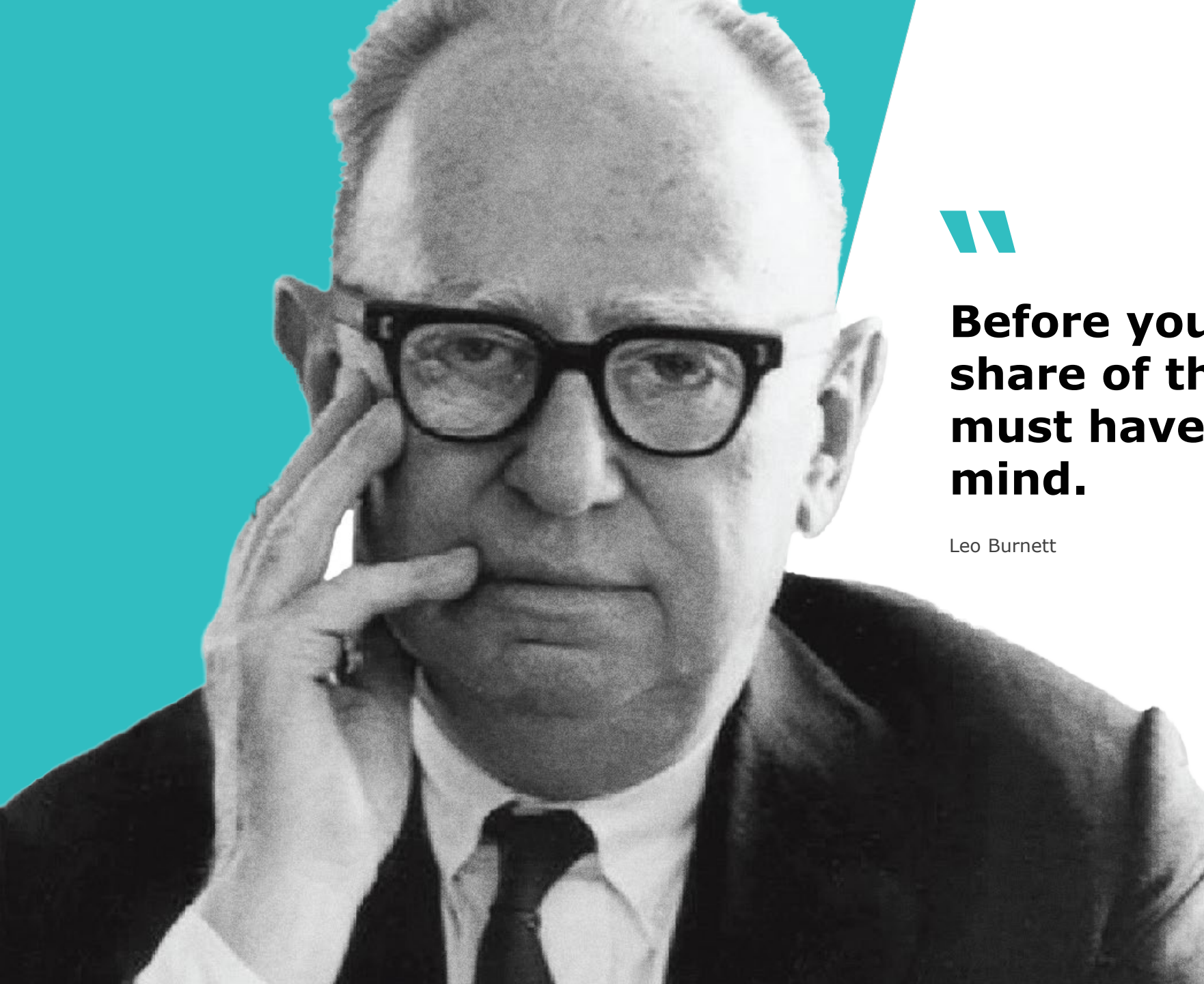
# impact

**tv ads are the  
most influential**



think<sup>tv</sup>








“

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

Leo Burnett

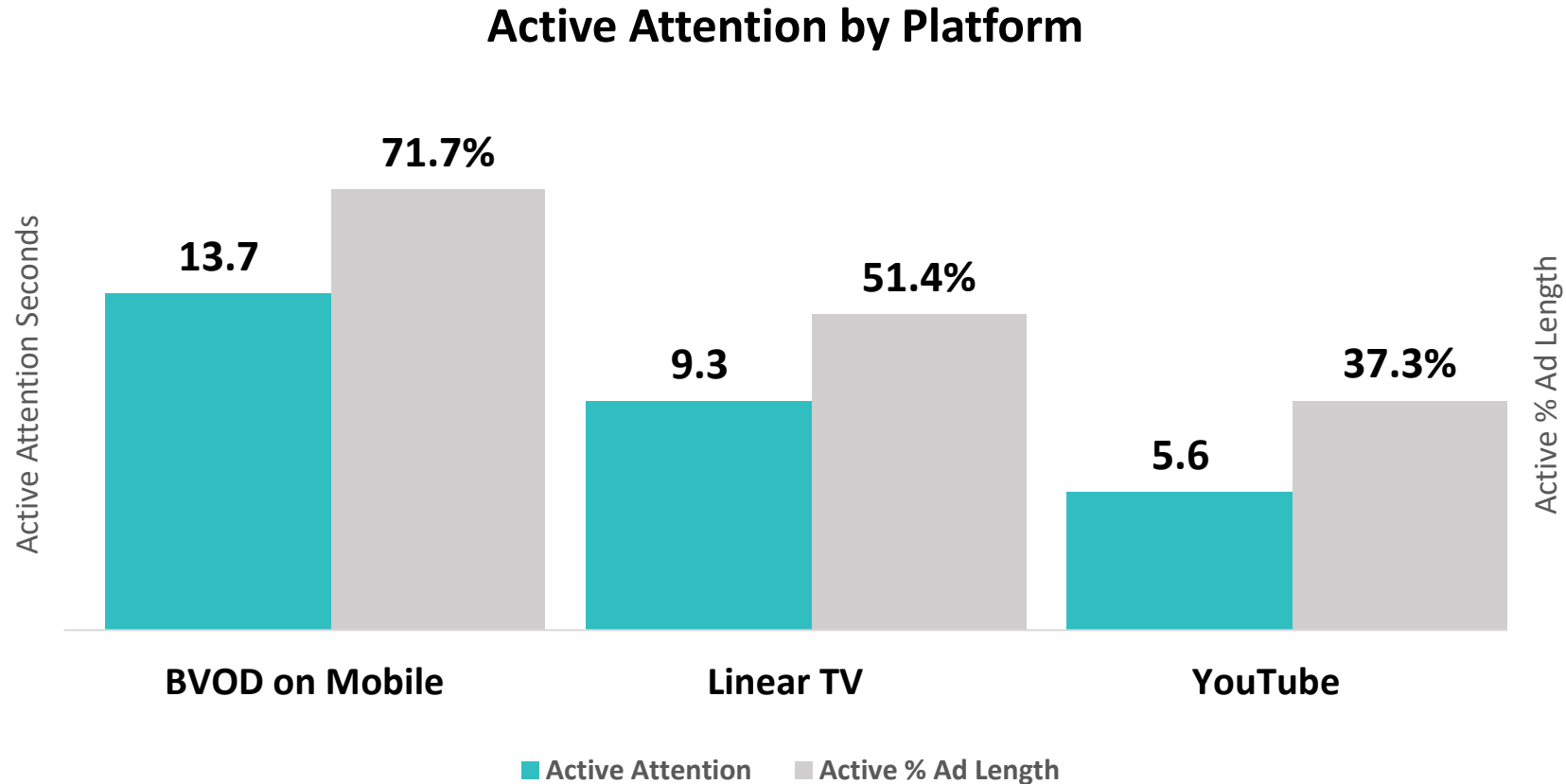
# **commands more attention**

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

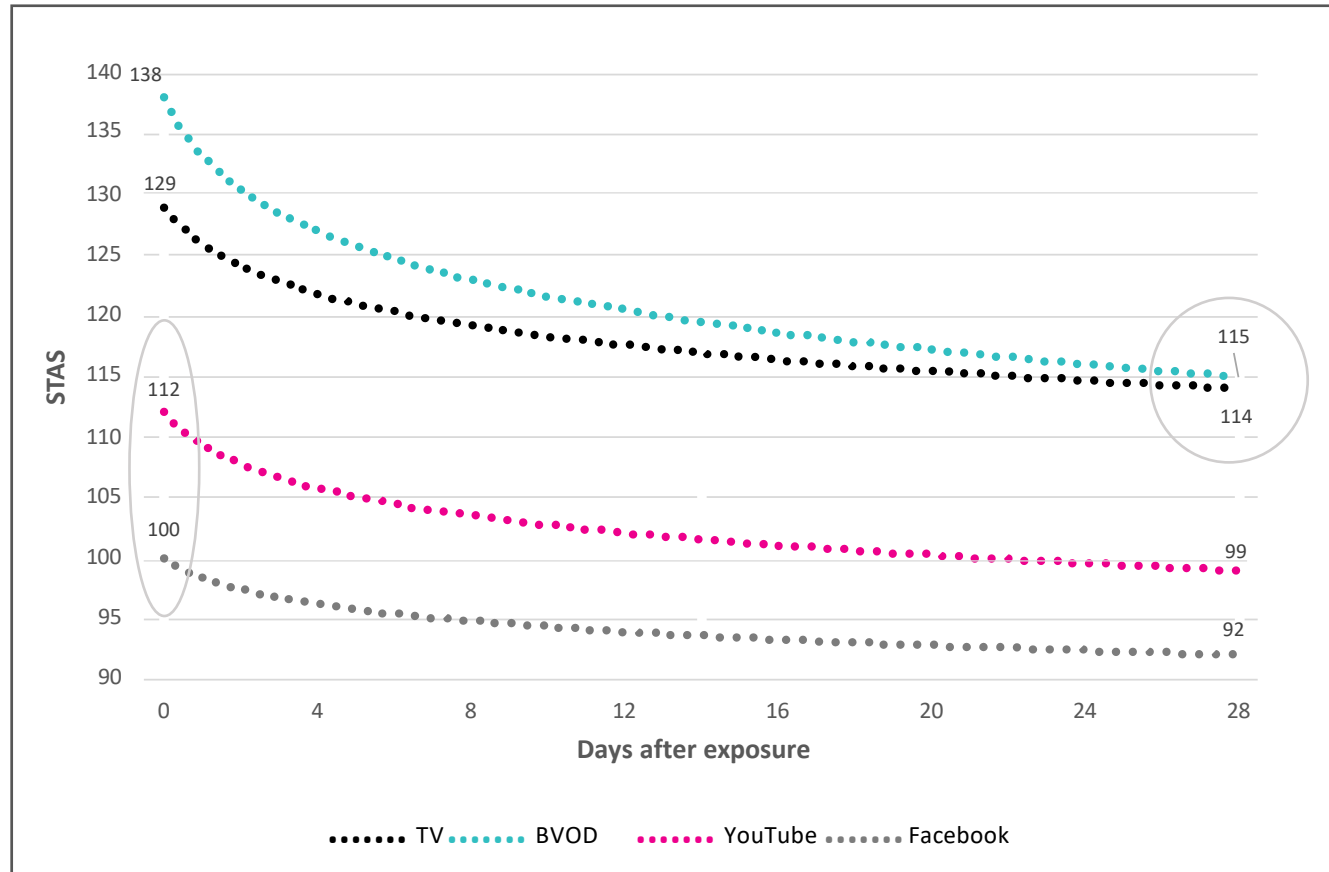
|                  |  |  |  |
|------------------|---|---|---|
| ACTIVE AVOIDANCE | 2%  | 2%  | 32%   |
| PASSIVE WATCHING | 40%   | 94%   | 37%   |
| ACTIVE WATCHING  | 58%   | 4%  | 31%   |



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



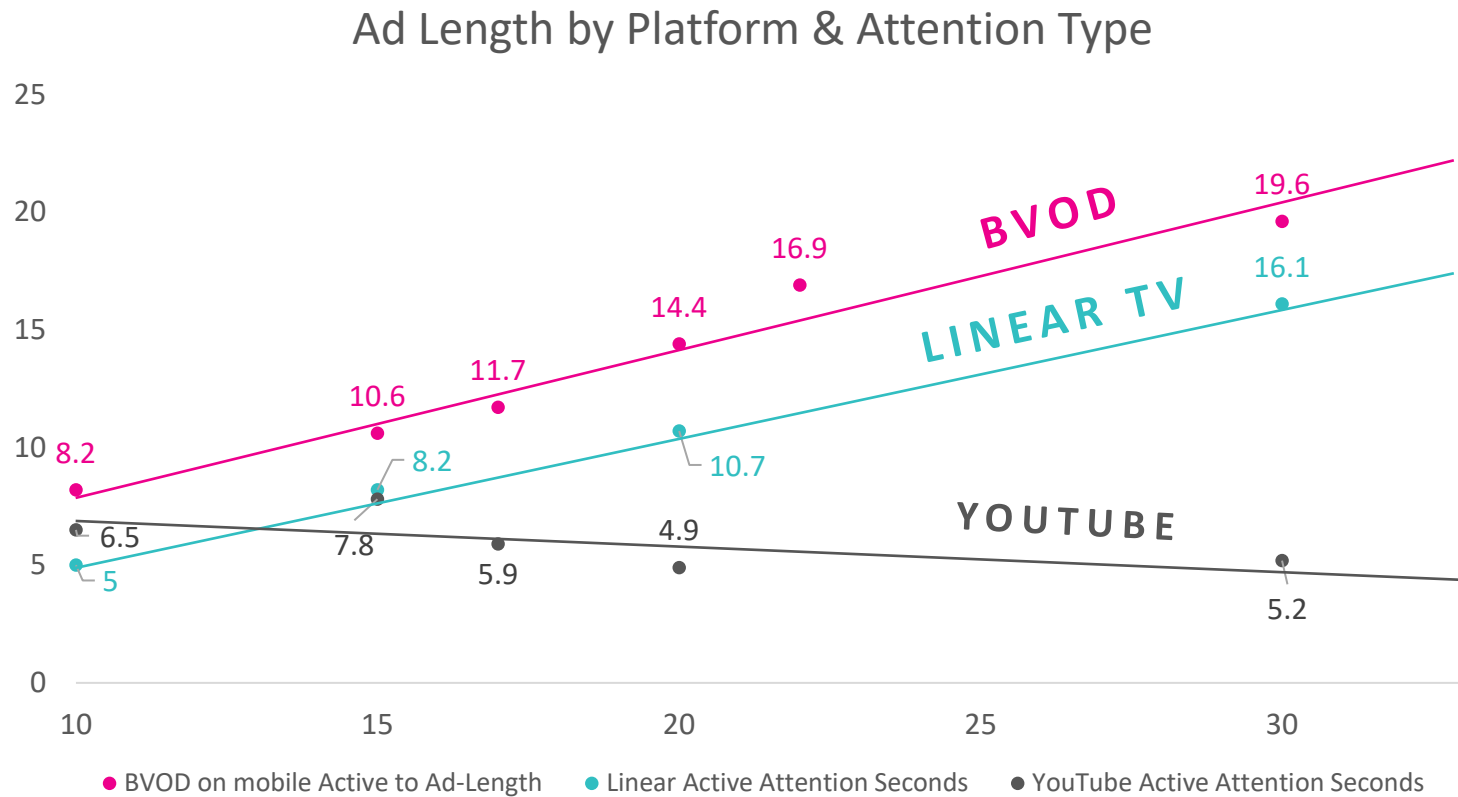
# a **tv** ad impacts sales far longer than any other platform



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

\*BVOD Modelled

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

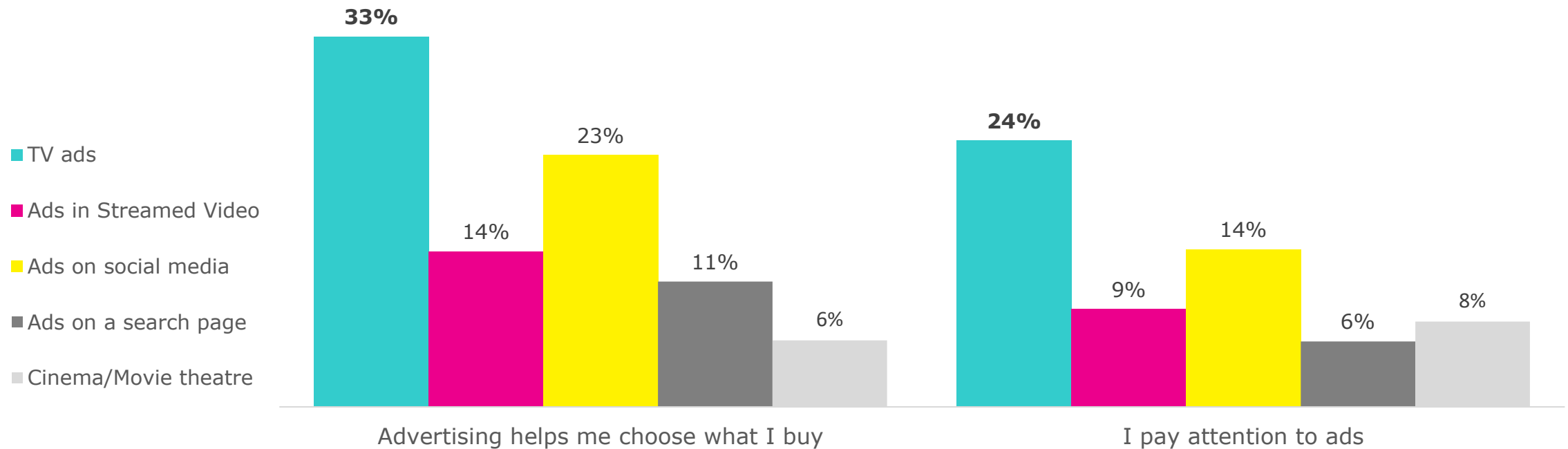


## TAKEAWAY:

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

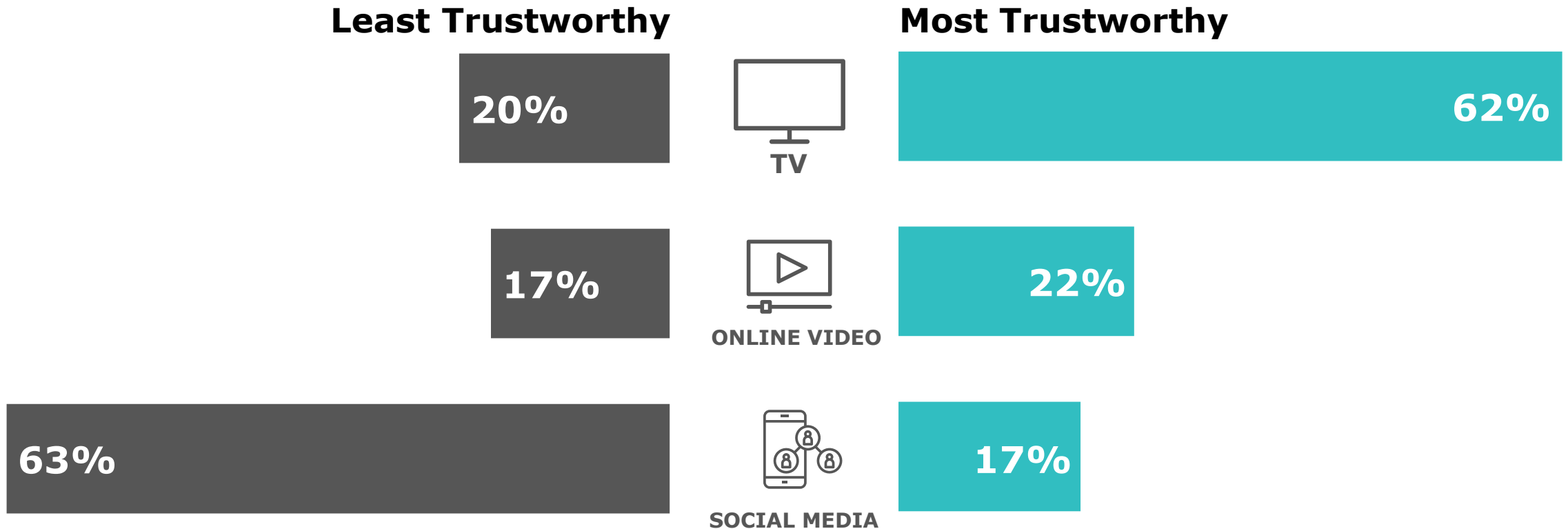
**ADULTS 18+**





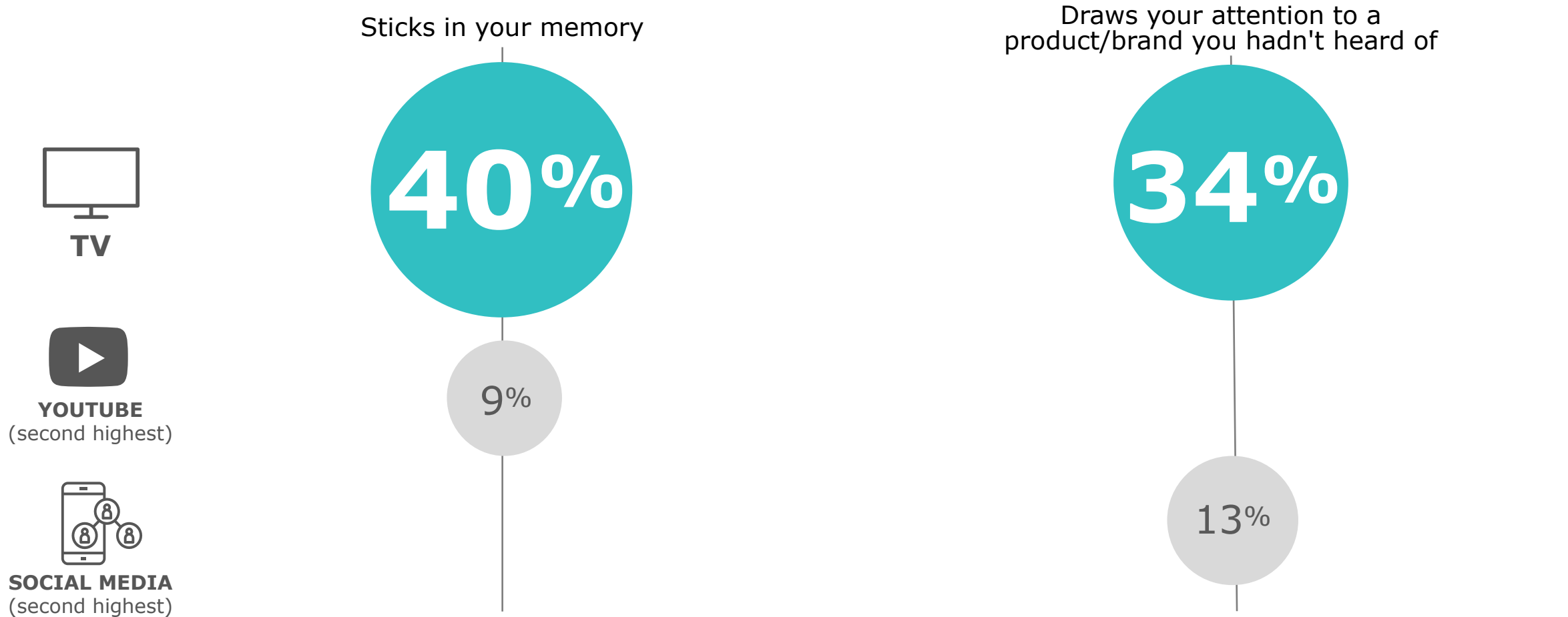
# tv is the most trusted medium

(while social media is the least trusted)



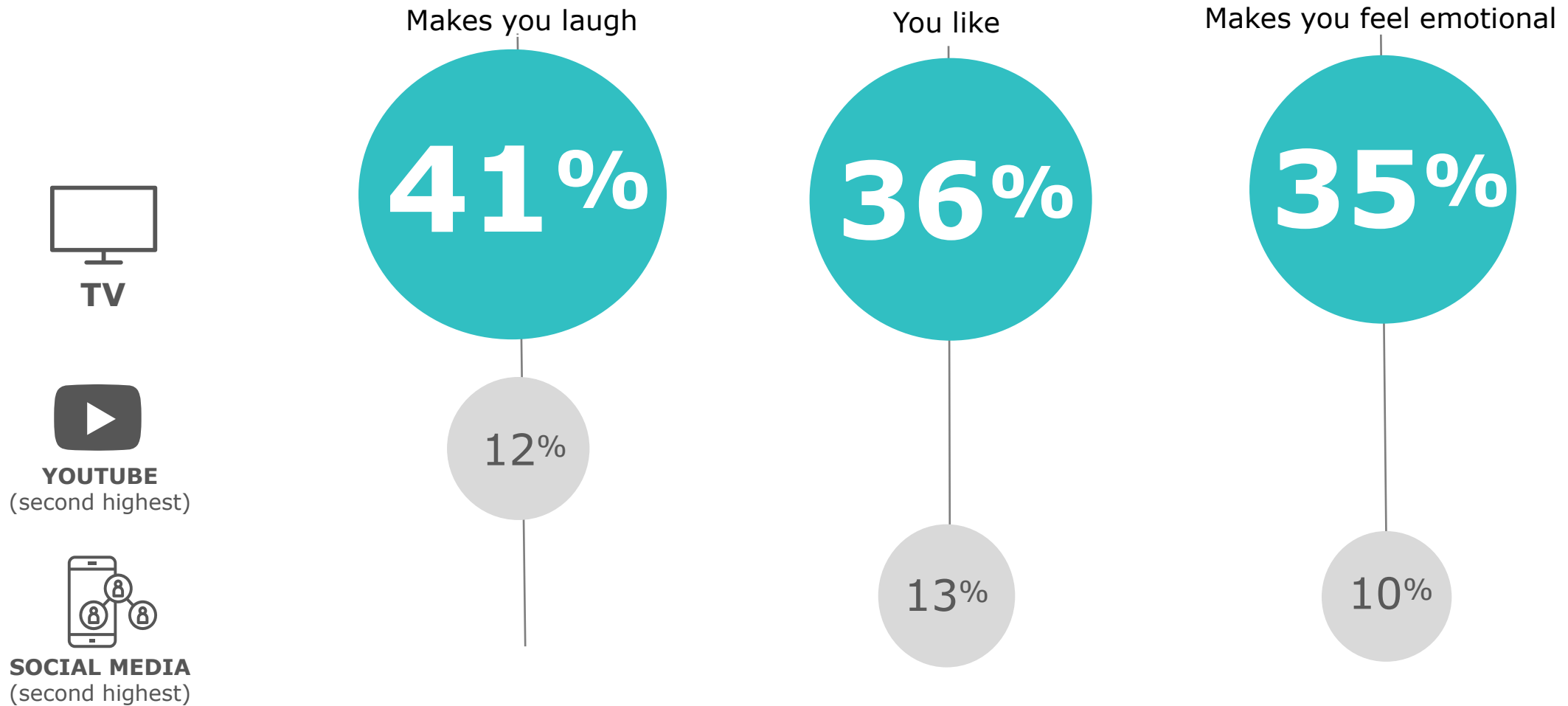
Which one of the following media carries video advertising that you believe to be most trustworthy? least trustworthy?

# **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...?*

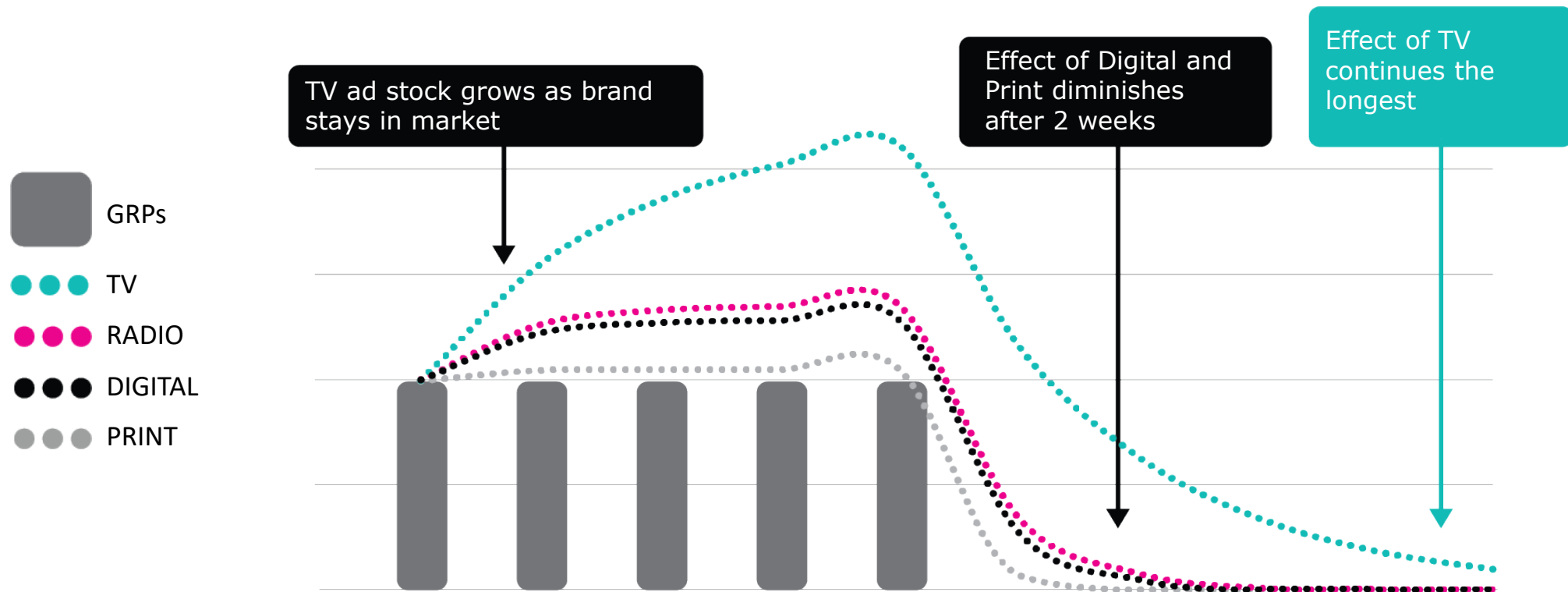
# **tv** advertising is the most likely to generate emotion and make you laugh



*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

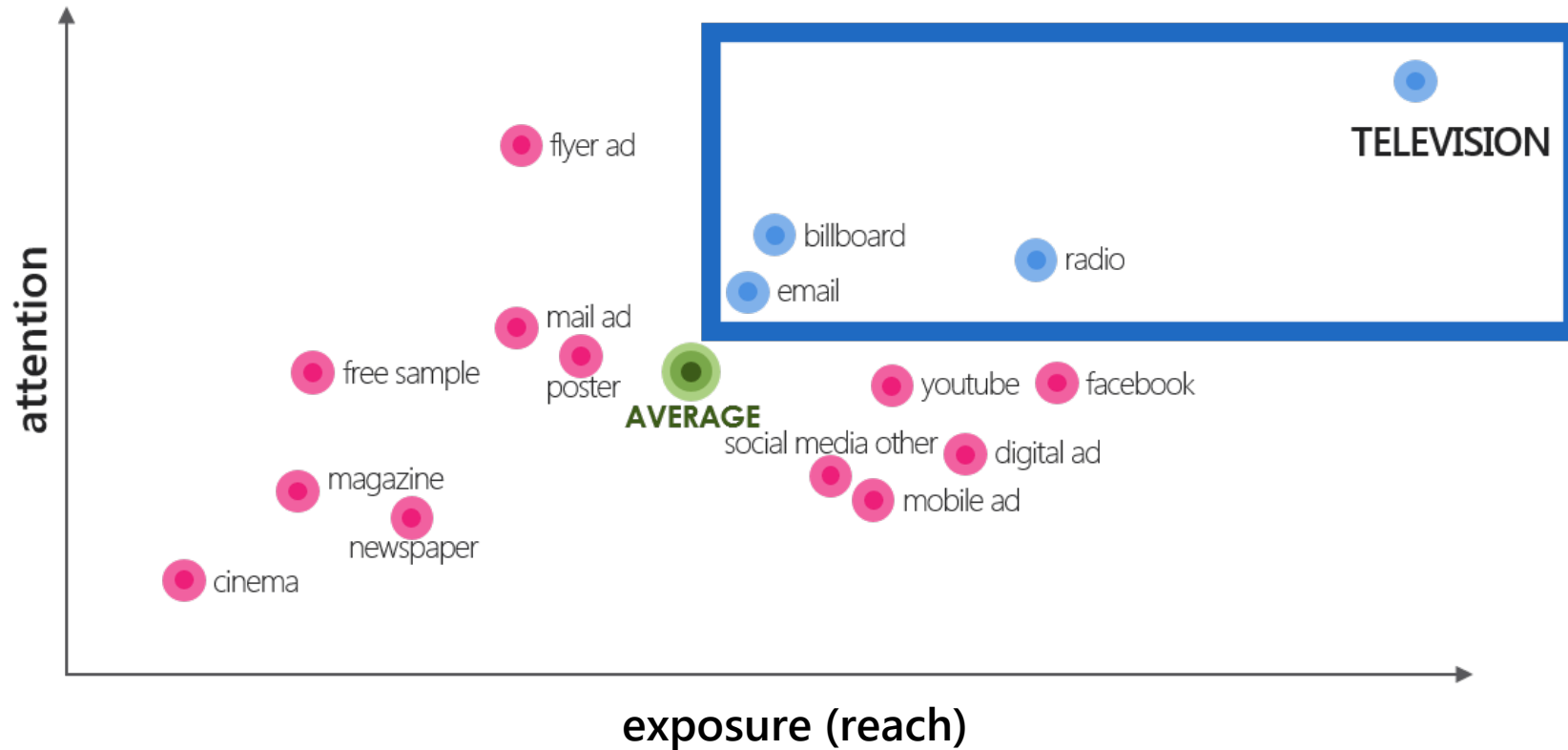


# tv is king

## when it comes to exposure & attention

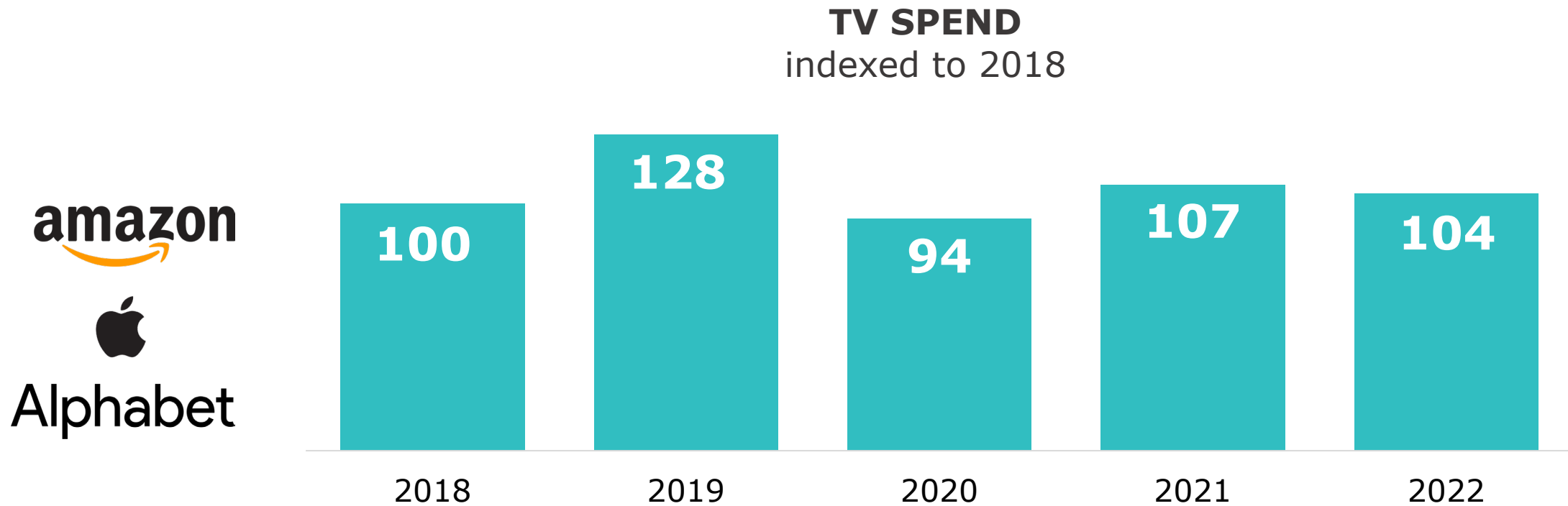
Each medium delivers some combination of reach (exposure) and consumer attention.

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

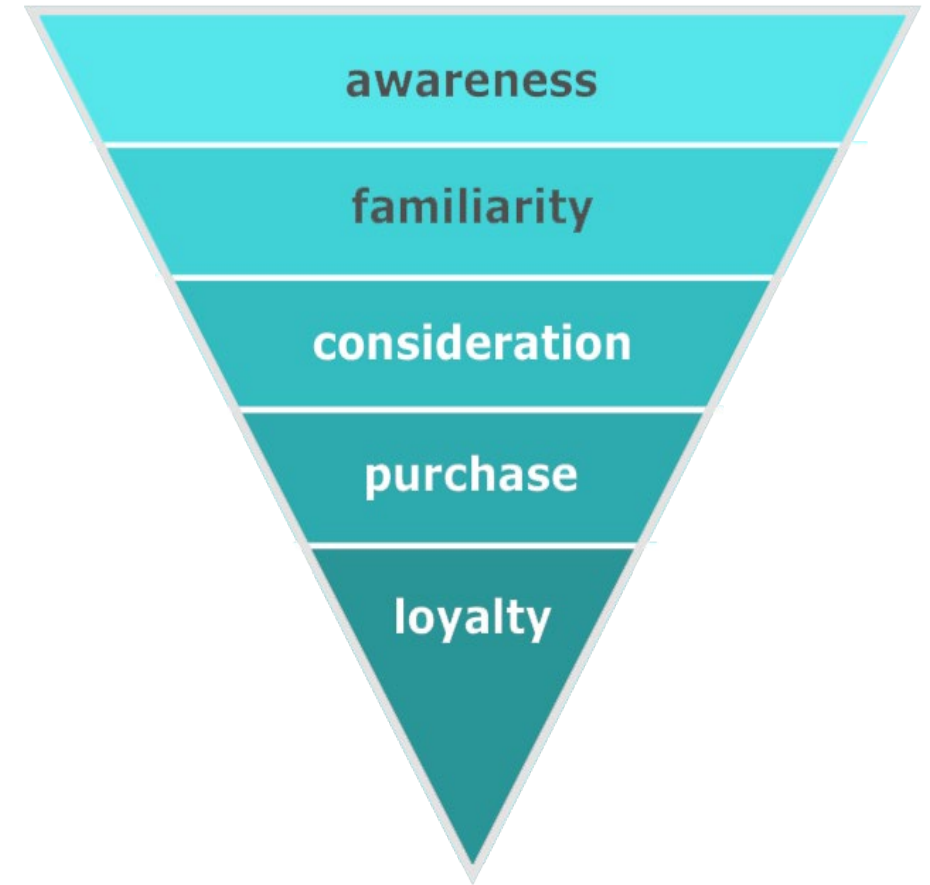
**TV is your best store-front window**

## **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

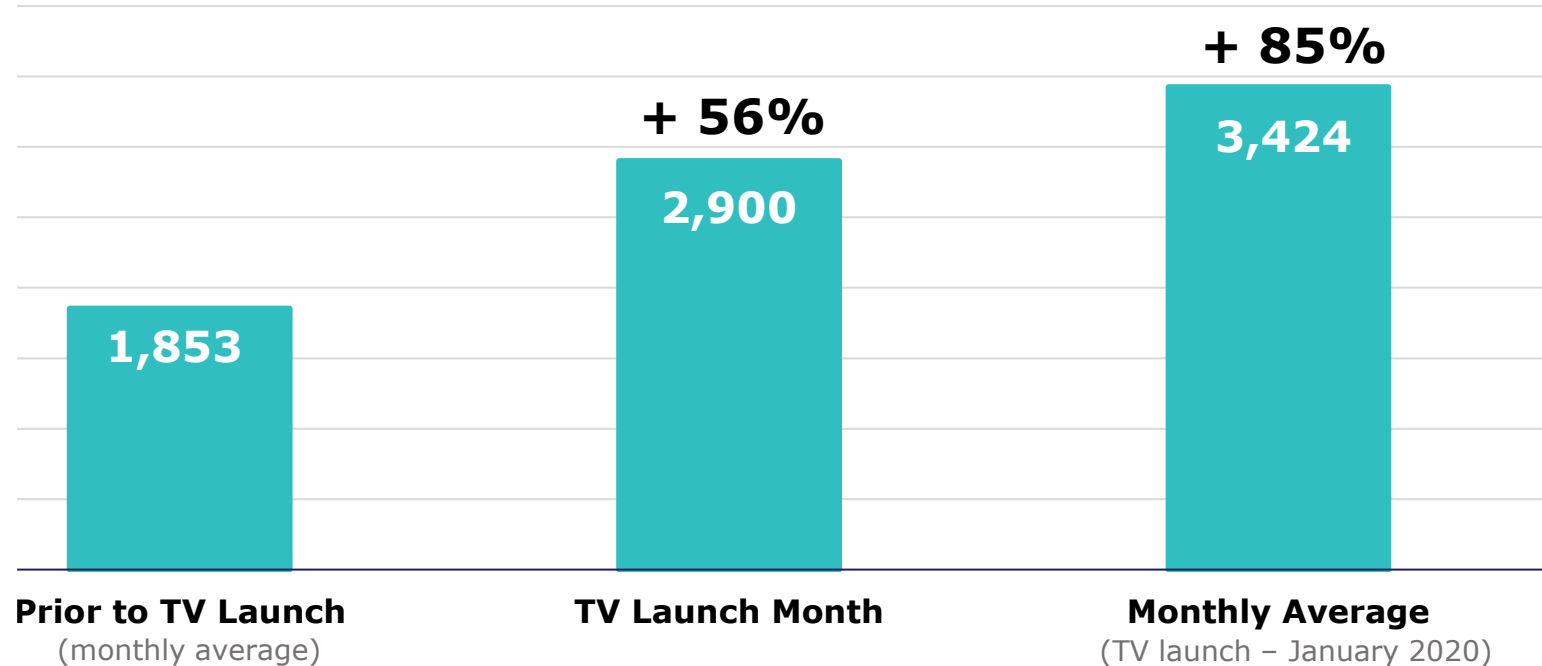
# tv drives the growth

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.

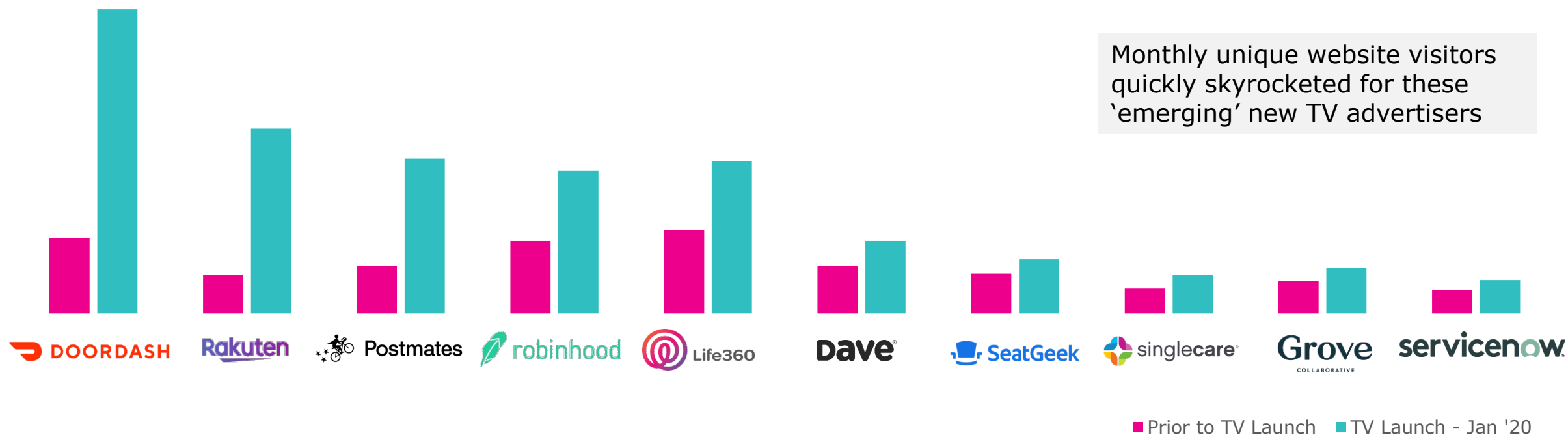


# tv drives the growth

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**



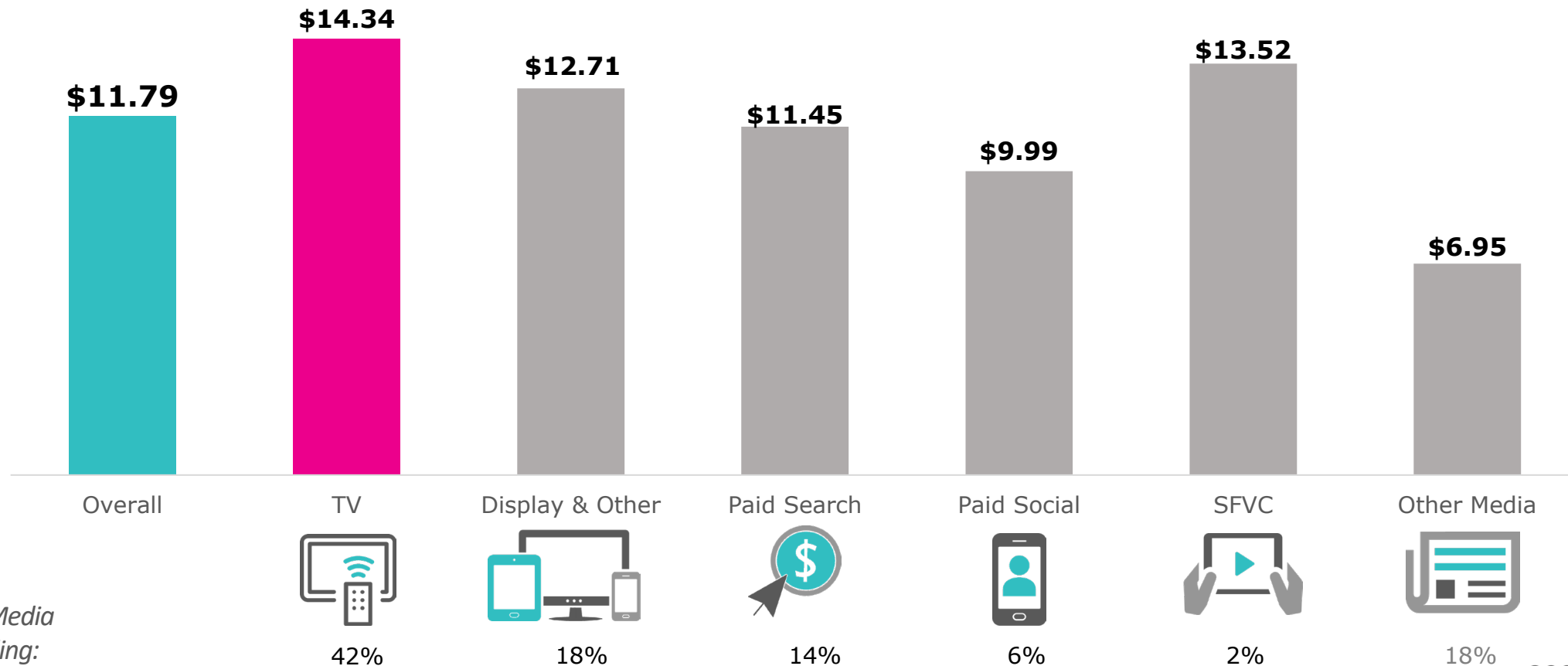
**think**<sup>tv</sup>



# 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

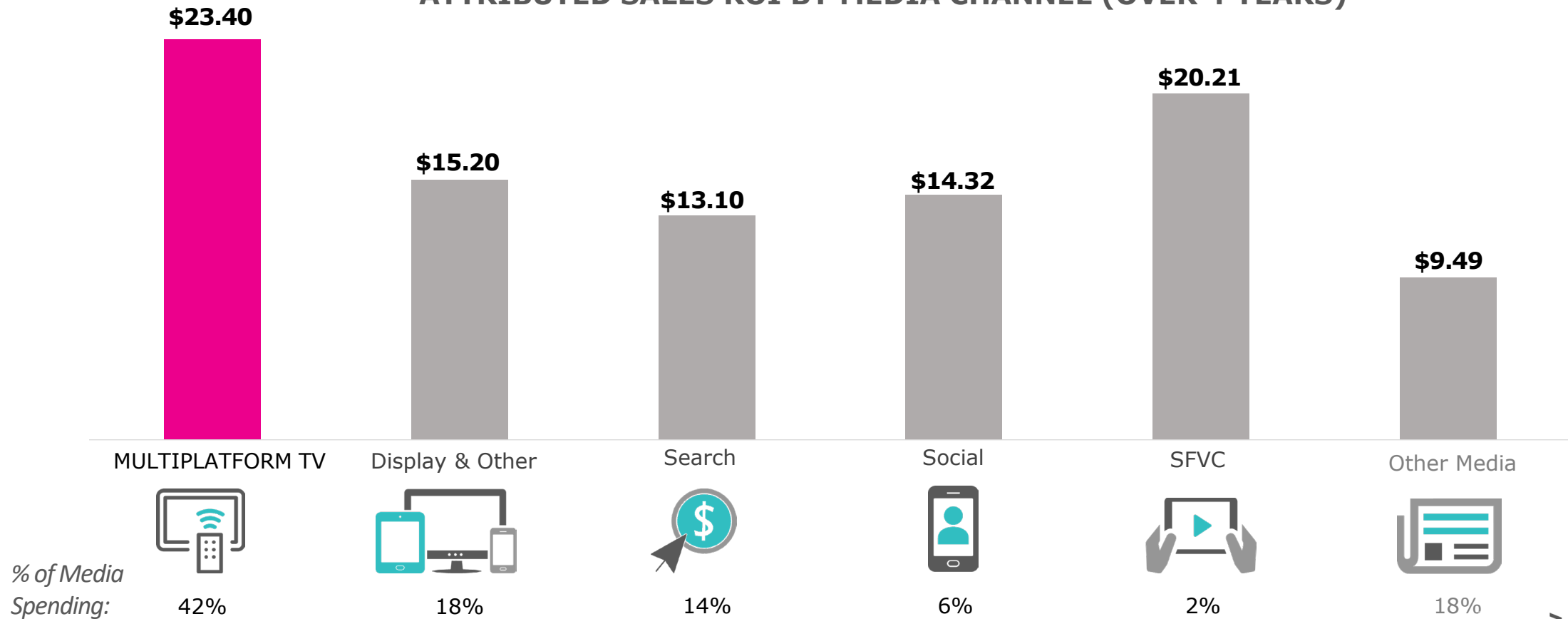


% of Media  
Spending:

# tv delivers the best ROI

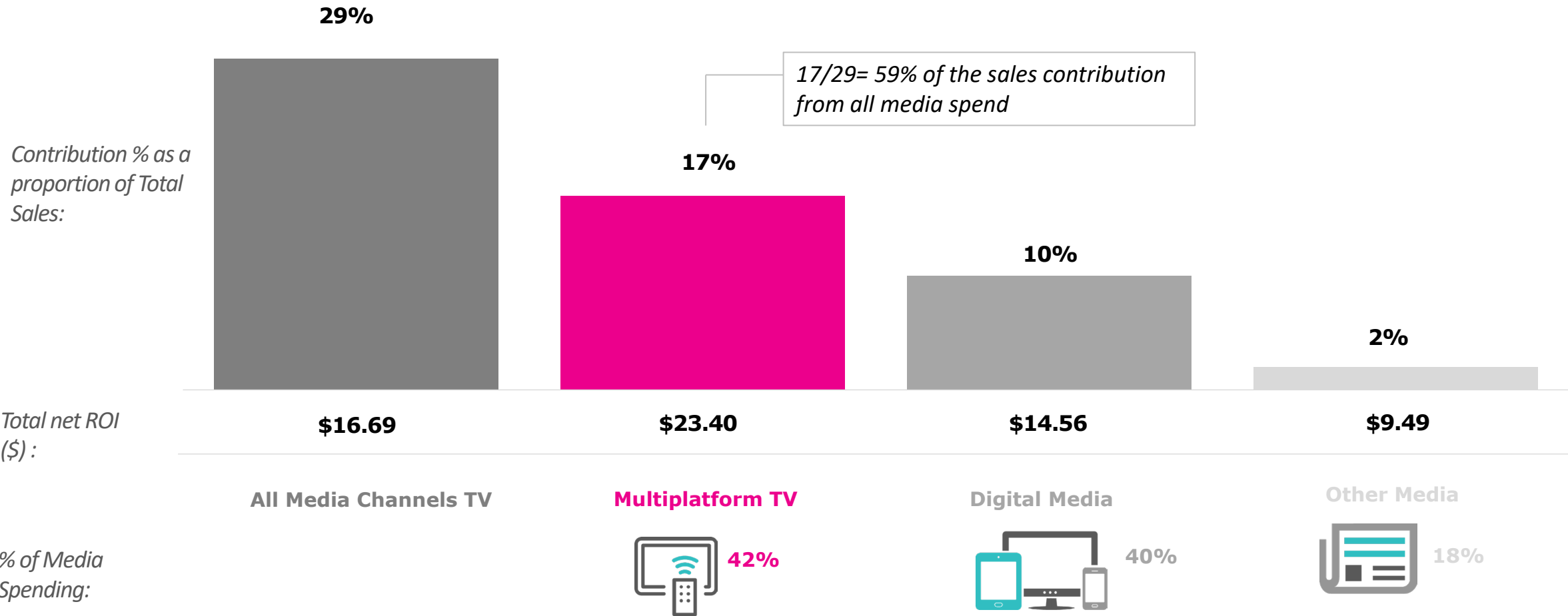
In the long term, TV's ROI grows to \$23.40

ATTRIBUTED SALES ROI BY MEDIA CHANNEL (OVER 4 YEARS)





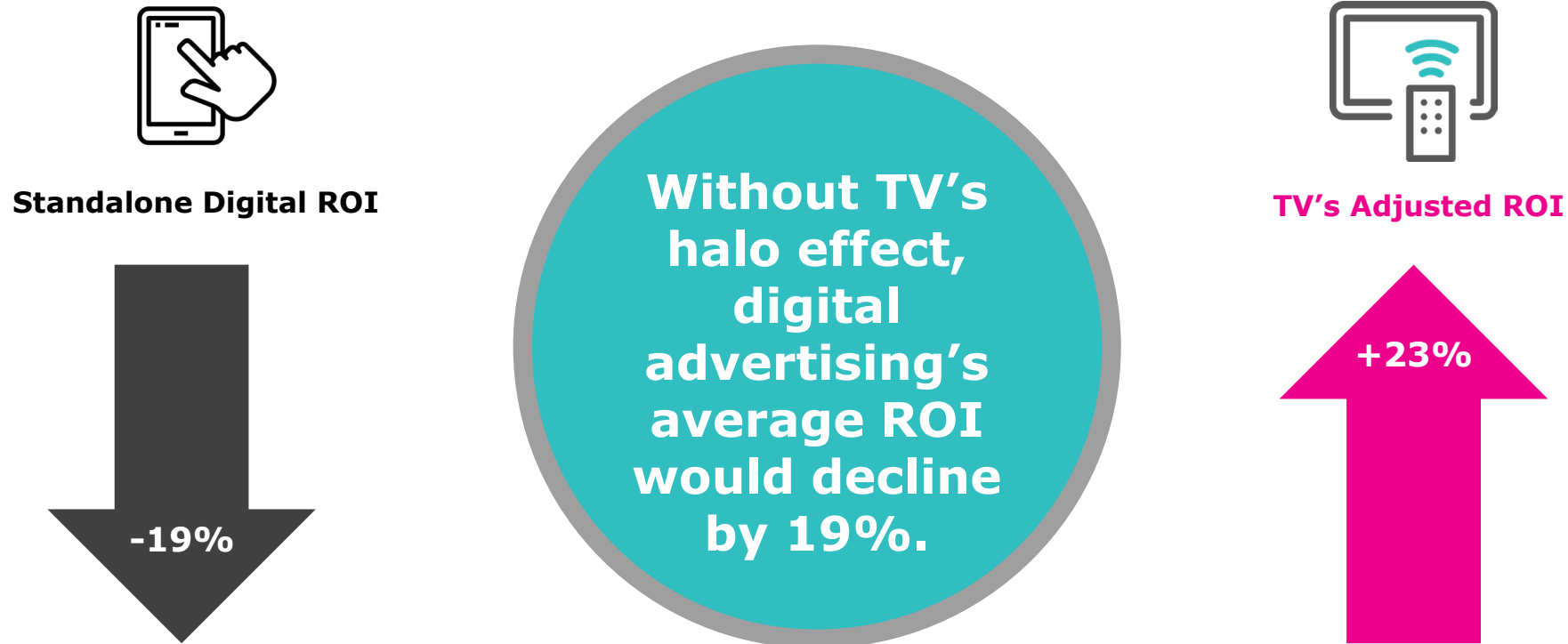
# Represents 42% of spend, but 58% of the sales contribution from the media



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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