

A blurred background image of a family sitting on a couch. In the foreground, a hand is holding a black remote control, pointing it towards the right. The overall scene suggests a family watching television together.

**the power of**



in an attention economy

# **tv** fast facts

- **TV reaches 86% of Canadian adults every week (over 27 Million A18+) – and 78% 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 and 14x that of Facebook**
- **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>

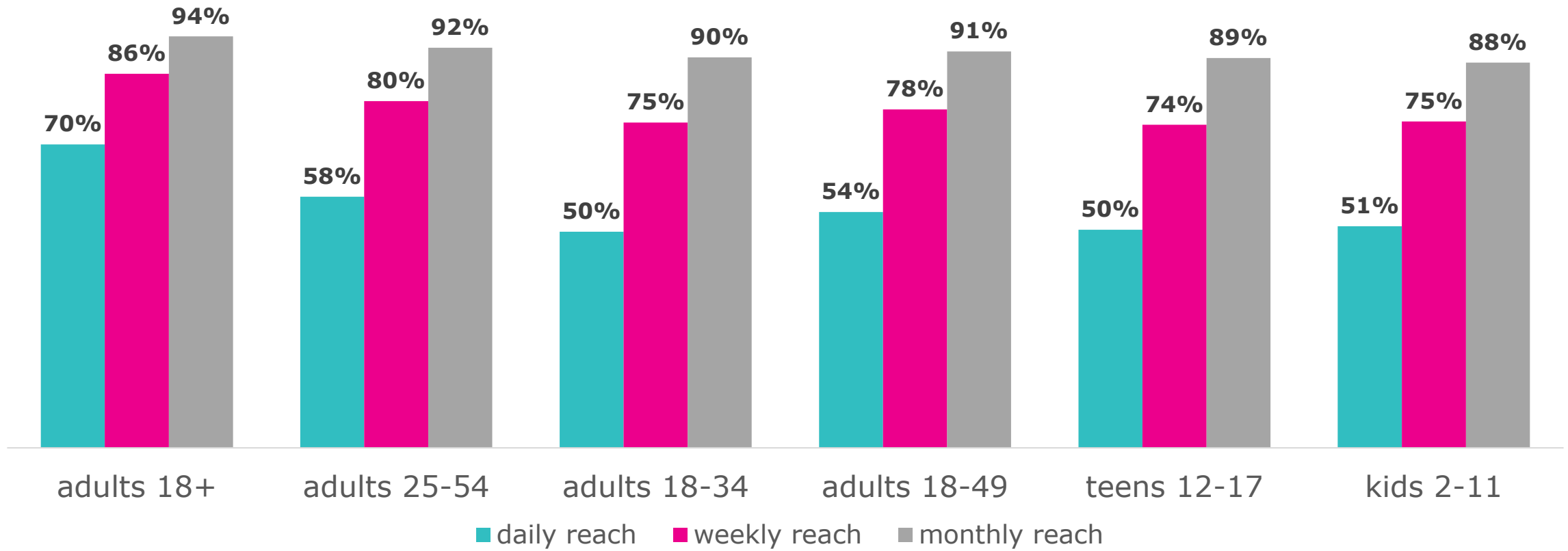
A man and a woman are sitting on a couch, smiling and looking towards the camera. The man is holding a red mug and a remote control. The woman is also holding a red mug. They appear to be in a living room setting.

# reach

**tv has superior reach**

# **tv** reaches **94%** of Canadians (18+)

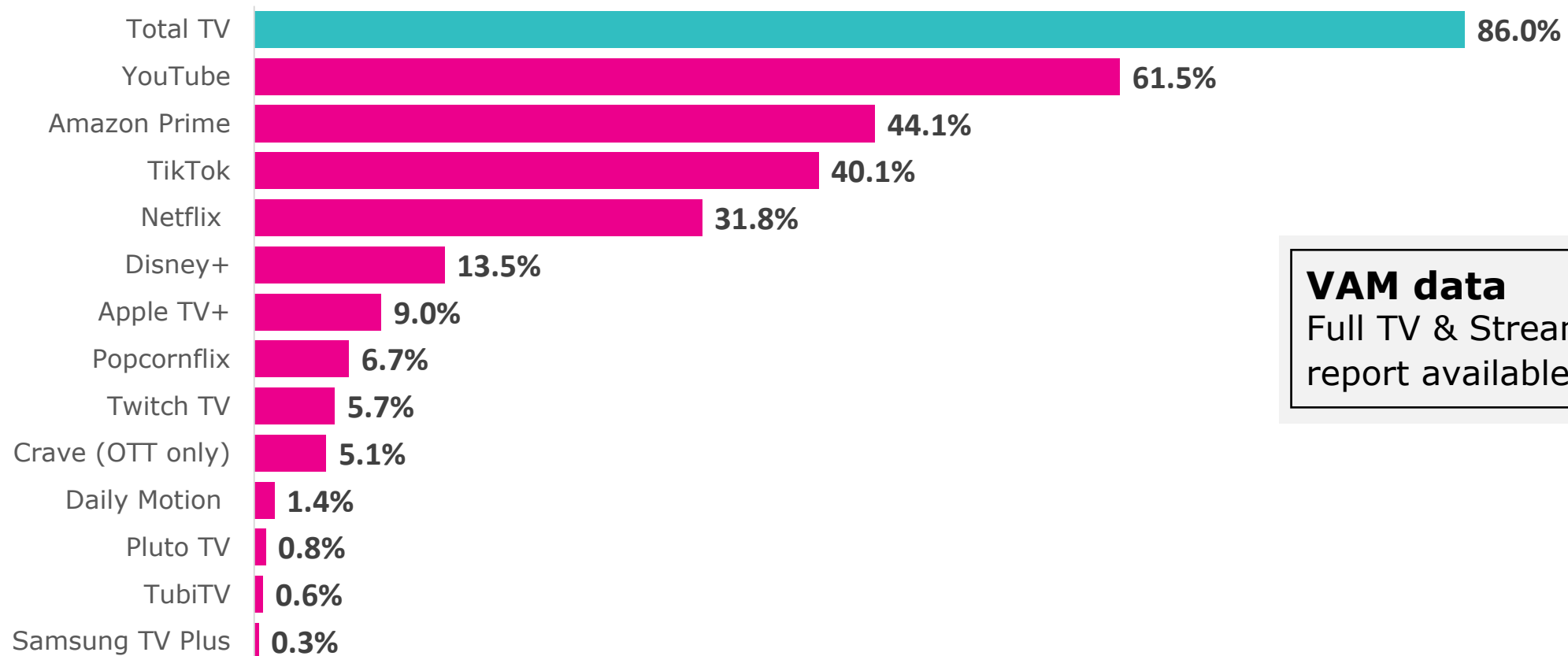
every month



# 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, Feb 27 - May 28 2023





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

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

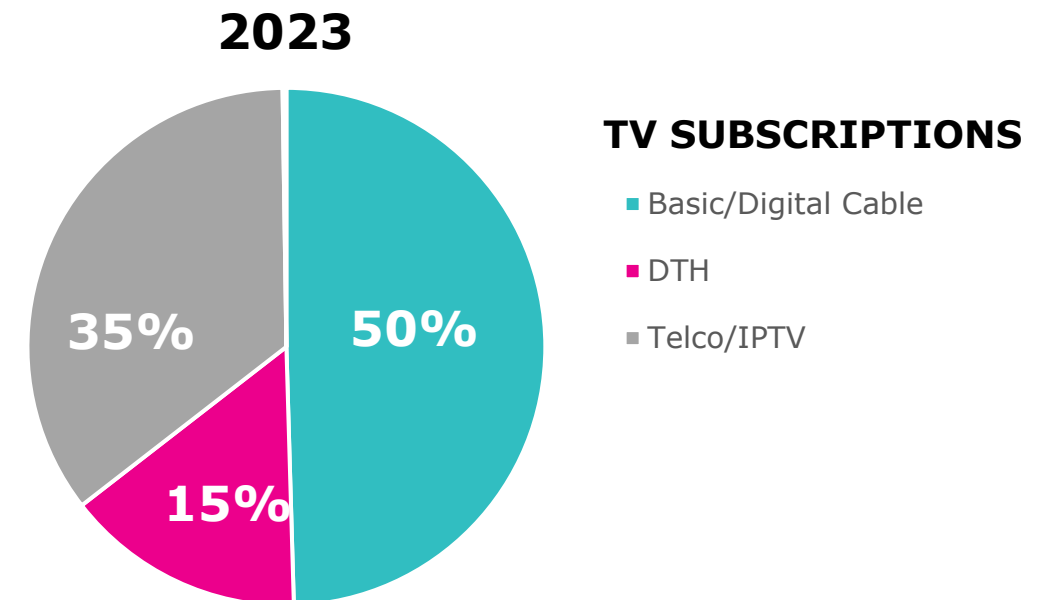
Byron Sharp  
Professor of Marketing Science, University of South Australia

# 10 million paid **tv** subscriptions

**Cord cutting has been far overstated: Paid TV subs down only 3%.**

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 '22	January '23	Index
<b>Total Paid Subs</b>	10,299,649	9,976,228	<b>97</b>
Basic/Digital Cable	5,282,405	4,942,166	94
Satellite	1,654,445	1,493,191	90
Telco/IPTV	3,338,871	3,517,281	105
Other	23,928	23,590	99



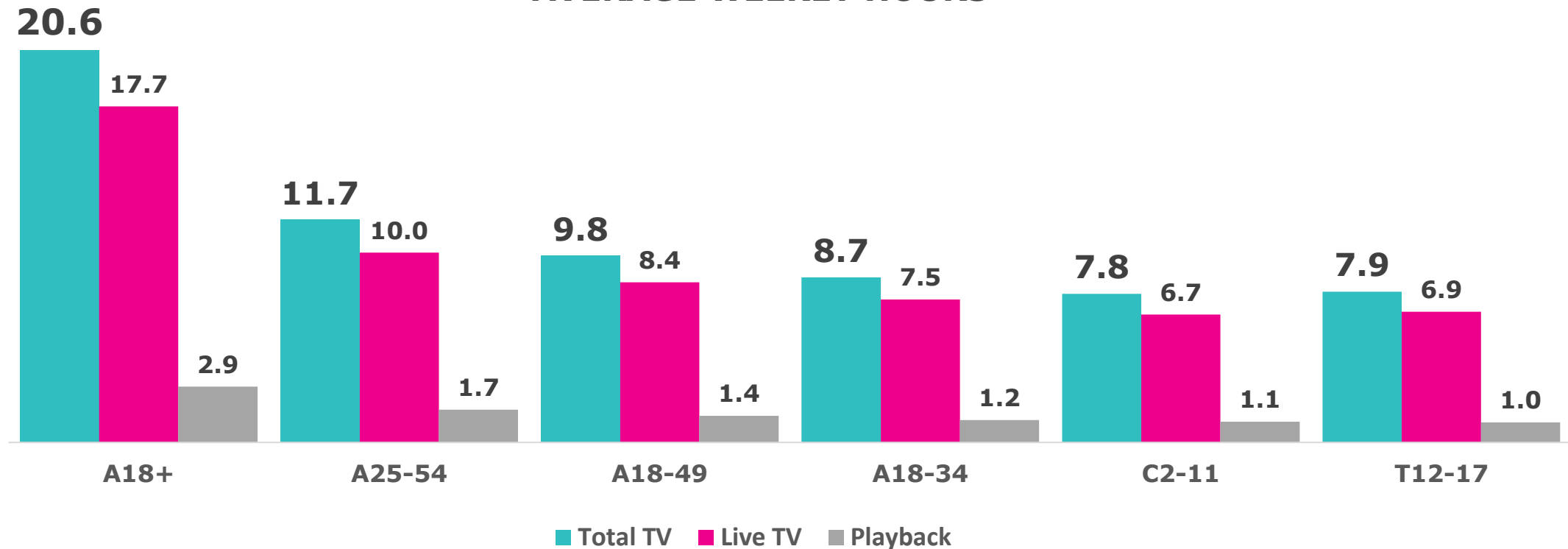


# Canadians watch a lot of



and most of it is live

## AVERAGE WEEKLY HOURS

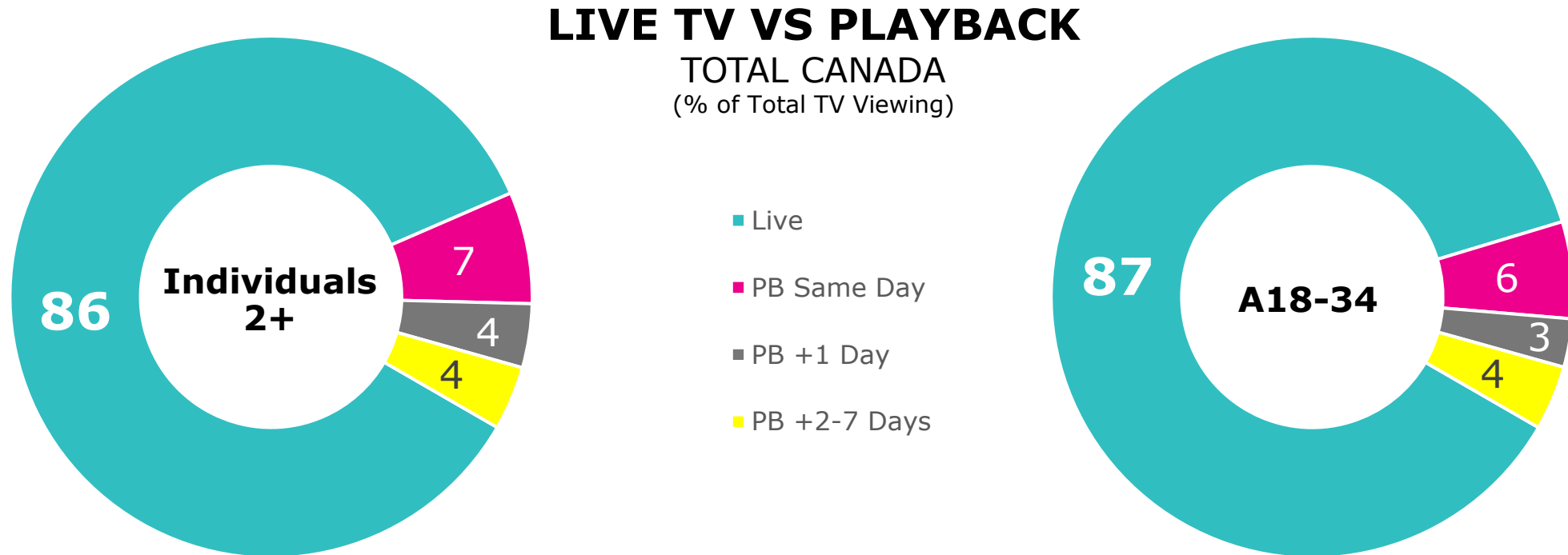


TV = viewing to any live broadcaster content (streamed on any platform and linear TV) plus any broadcaster content recorded on PVR (with commercial load intact) that is viewed within 7 days of initial broadcast. Does not include on demand streaming.

Canada | Numeris PPM, Total Hours(000) Sep 12 – May 28 2023 | PB = Playback

# 86% of linear **tv** viewing is **live**

Even among young adults, 87% of TV viewing is live; 93% is live + same day playback



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.

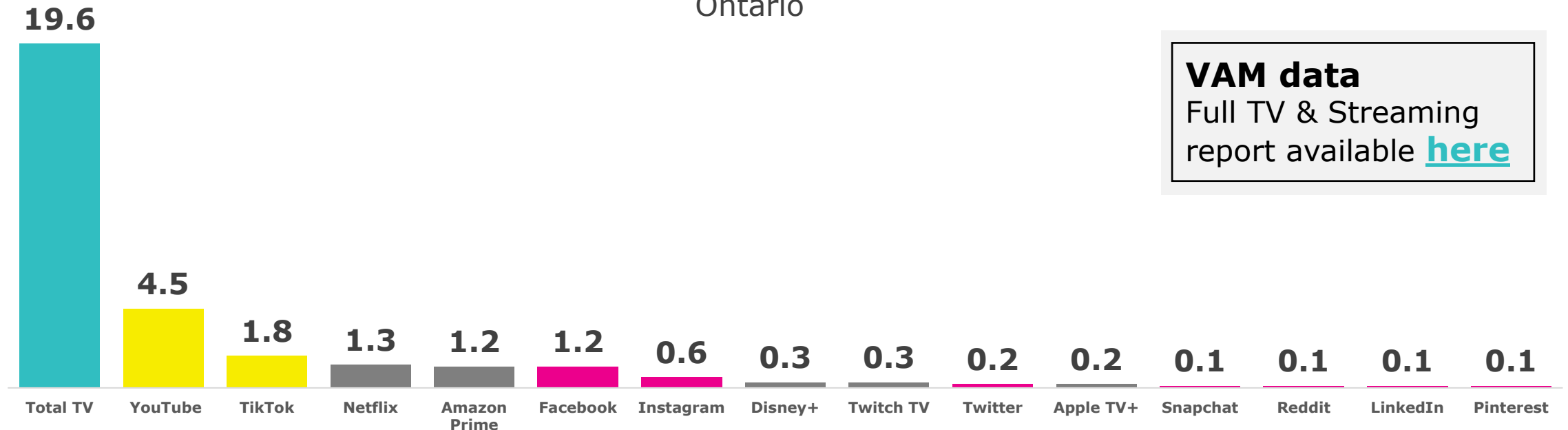
Canada | Numeris PPM, Total Hours(000) Sep 12 – May 28 2023 | PB = Playback

# time spent with **tv** exceeds all other video

**ADULTS 18+**  
AVERAGE WEEKLY HOURS  
Ontario

## VAM data

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



All time spent per capita

Total TV defined as linear TV and broadcaster streaming services

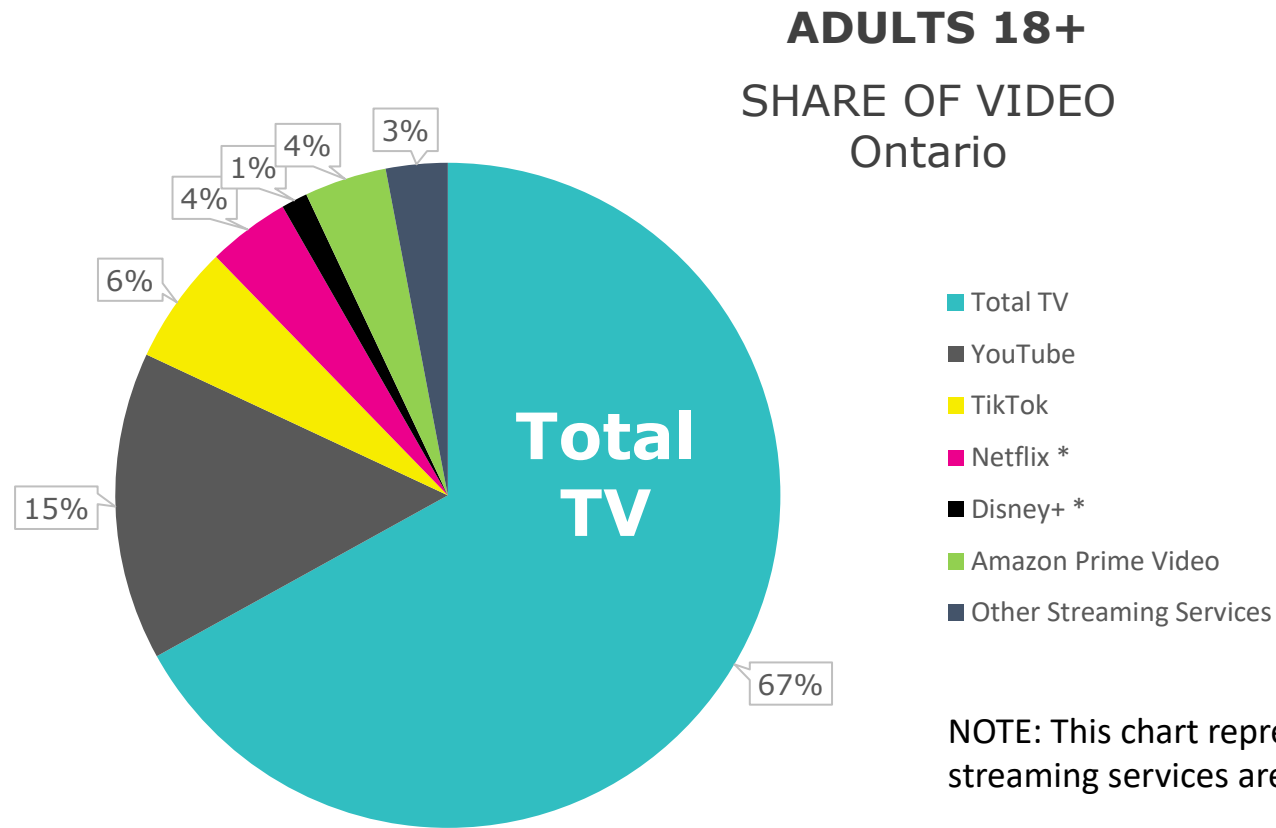
Streaming Services (Netflix, Amazon Prime, Disney+, TwitchTV, Apple TV+), YouTube, and TikTok include in-home viewing only

Sources: Numeris VAM, Feb 27 - May 28 2023 for Total TV, Streaming Services, YouTube, and TikTok;

Comscore, Mar - May 2023 for Social Media (Facebook, Instagram, Twitter, Snapchat, Reddit, LinkedIn, Pinterest)

# tv dominates time spent with video

## and should form the base of every video plan



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

NOTE: This chart represents total video, not total ad-supported video; streaming services are primarily commercial-free

All time spent per capita

Total TV defined as linear TV and broadcaster streaming services

Streaming Services (Netflix, Amazon Prime, Disney+, TwitchTV, Apple TV+), YouTube, and TikTok include in-home viewing only

Other Streaming Services: Crave (OTT only), FuboTV, Paramount+, DAZN, TubiTV, Crunchyroll, Roku, Daily Motion, Samsung TV Plus, TED, Club Illico, Discovery+, CBS News, and ET

Source: Numeris VAM, March – May for Total TV, Streaming Services, YouTube, and TikTok



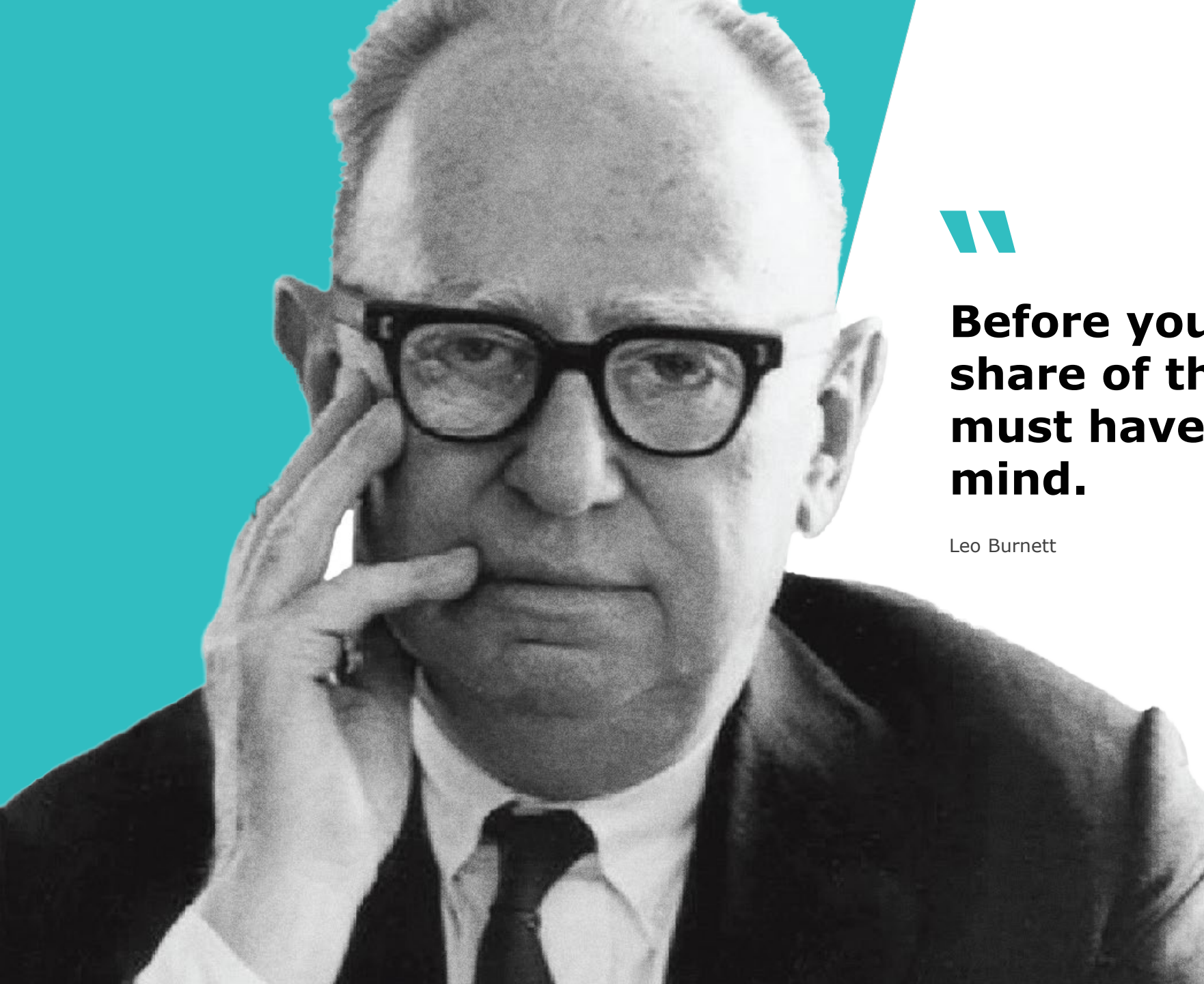
# impact

**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.**

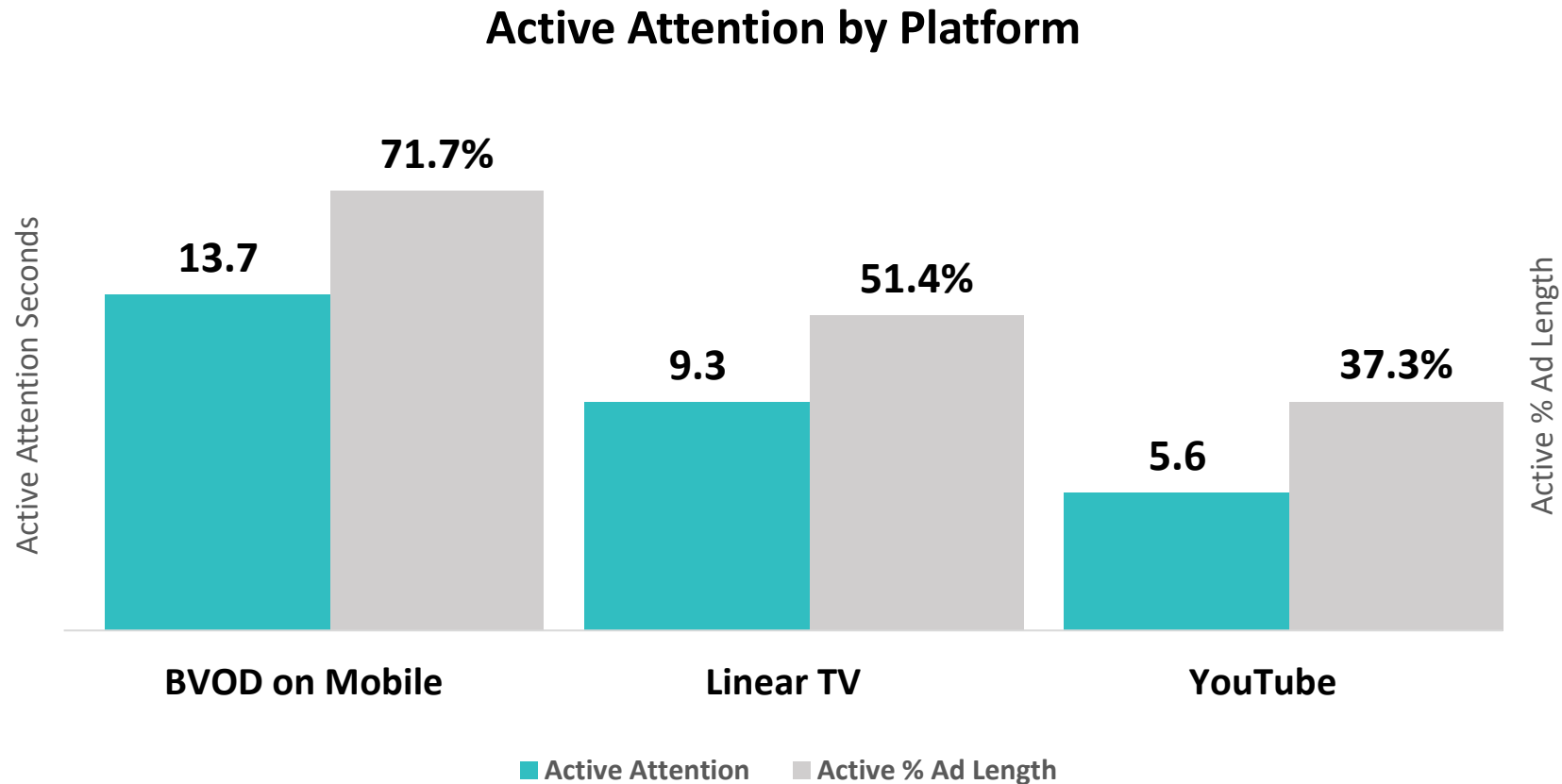
Leo Burnett

# 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

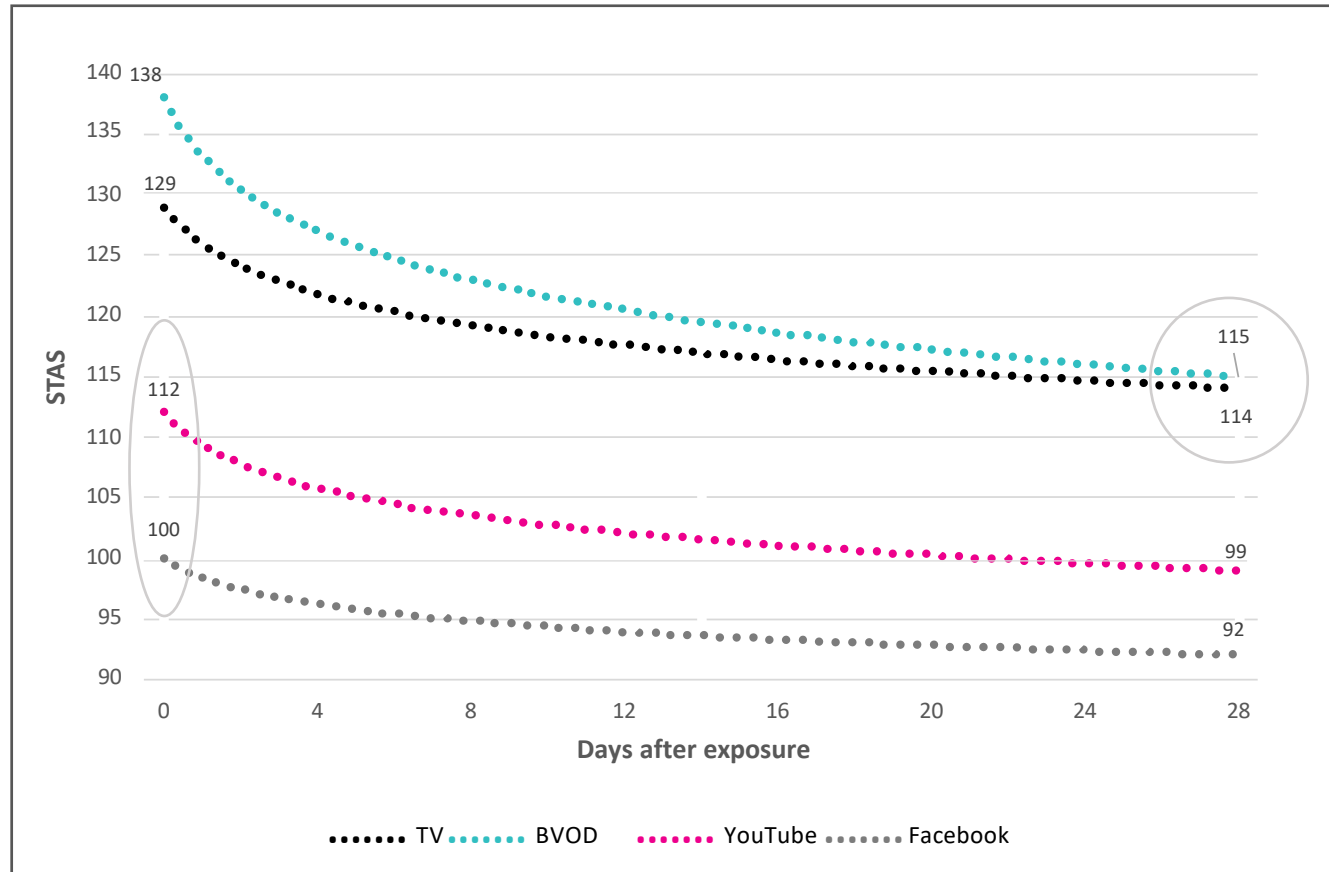
			
ACTIVE AVOIDANCE	2%	2%	32%
PASSIVE WATCHING	40%	94%	37%
ACTIVE WATCHING	58%	4%	31%

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





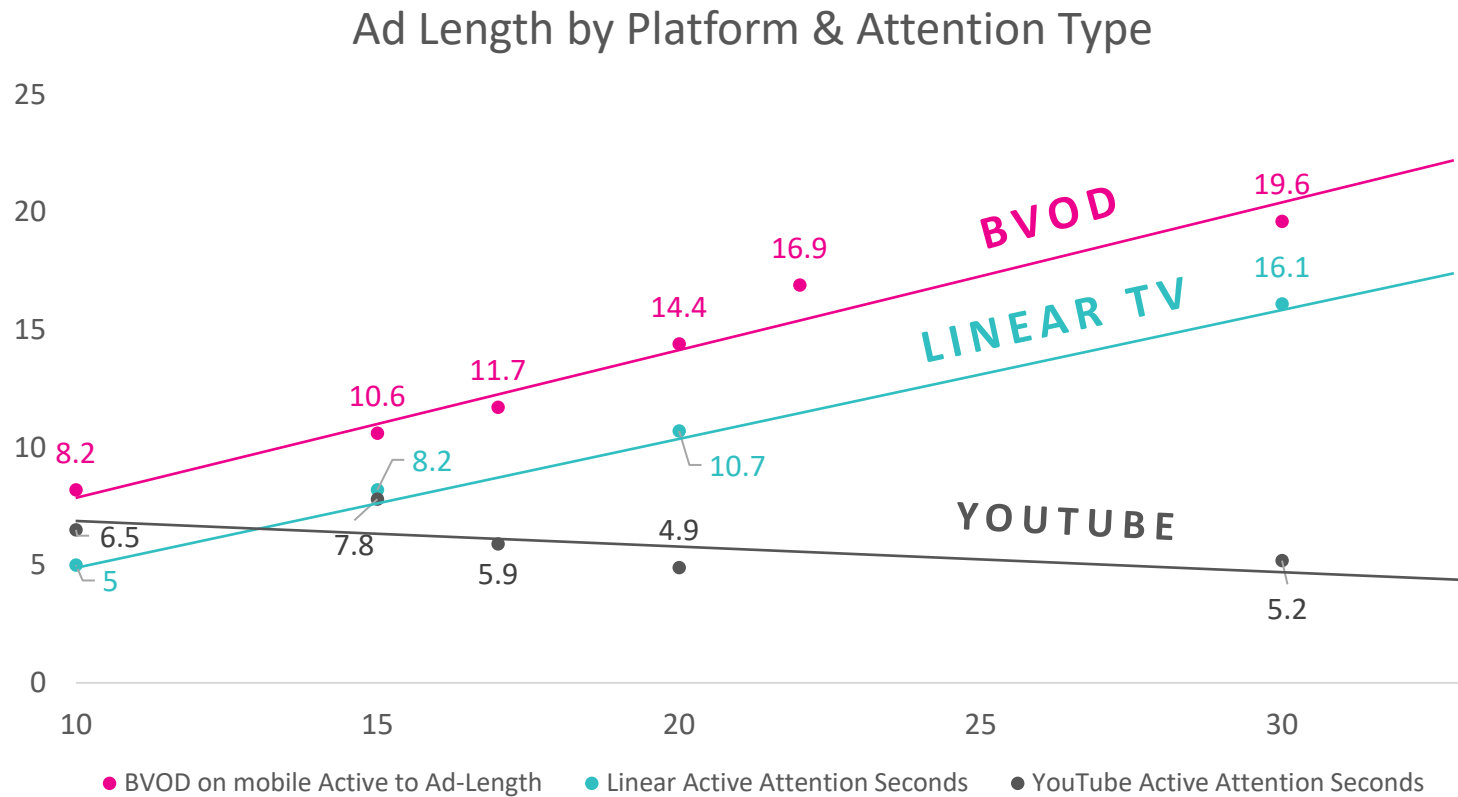
# length of time that a **tv** ad impacts sales far exceeds any other platform



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

\*BVOD Modelled

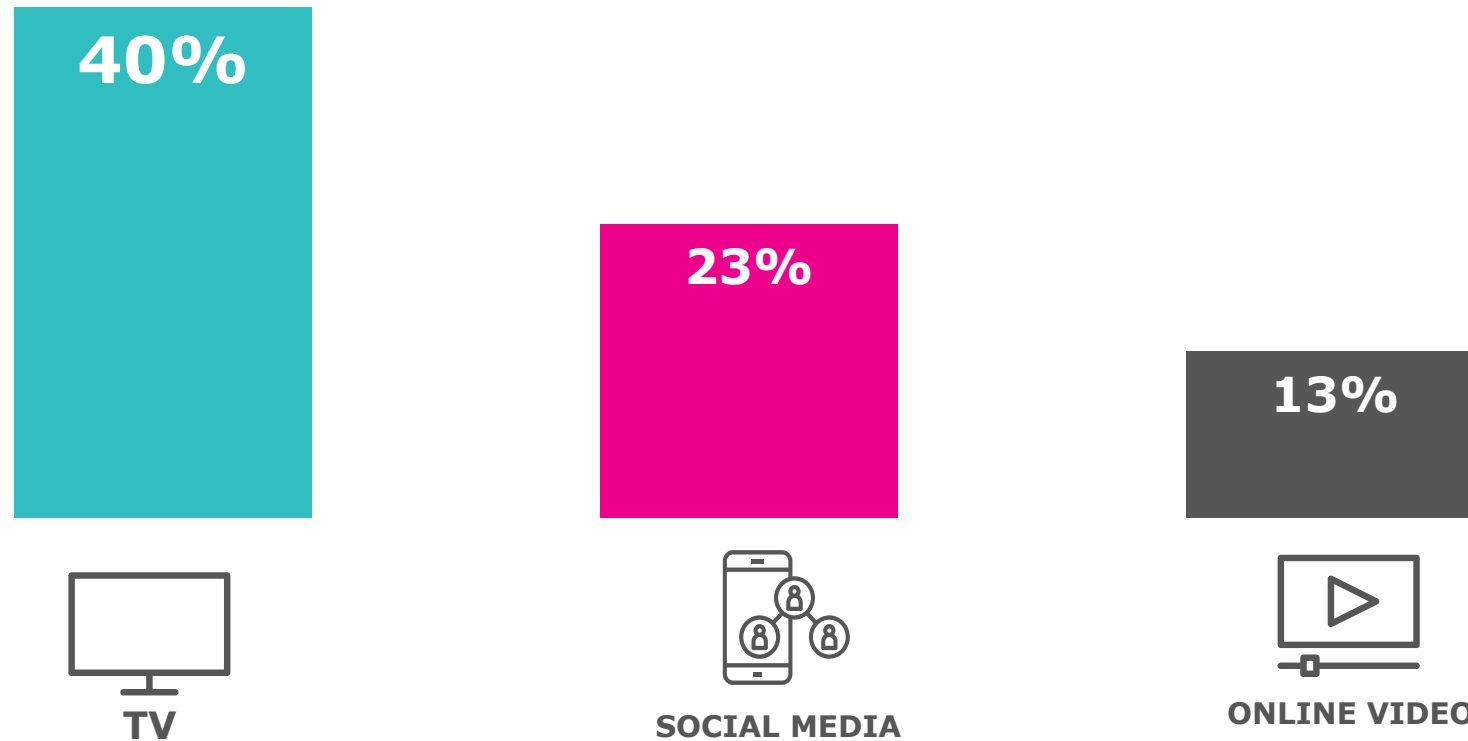
# longer ads on **tv** get more attention due to flatter decay distributions



## TAKEAWAY:

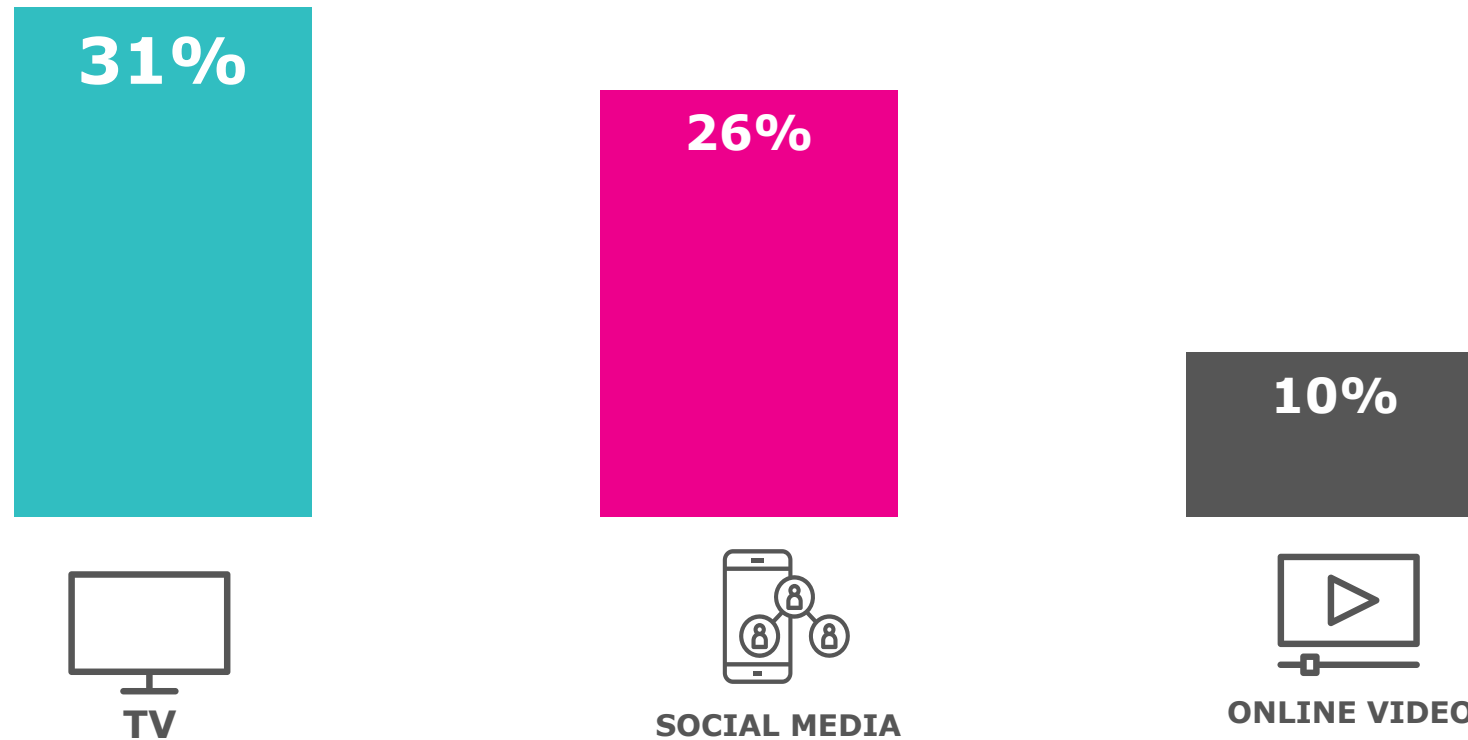
Longer ads on YouTube do not give you more Attention, **but on BVOD on mobile and Linear TV they do**

# tv ads are the most memorable



Q: Which *ONE* of the following media carries advertising that you are most **LIKELY TO REMEMBER**?  
not listed are: "Other" @ 25%; includes newspaper, radio, search & OOH.

# **tv** is most likely to drive purchases

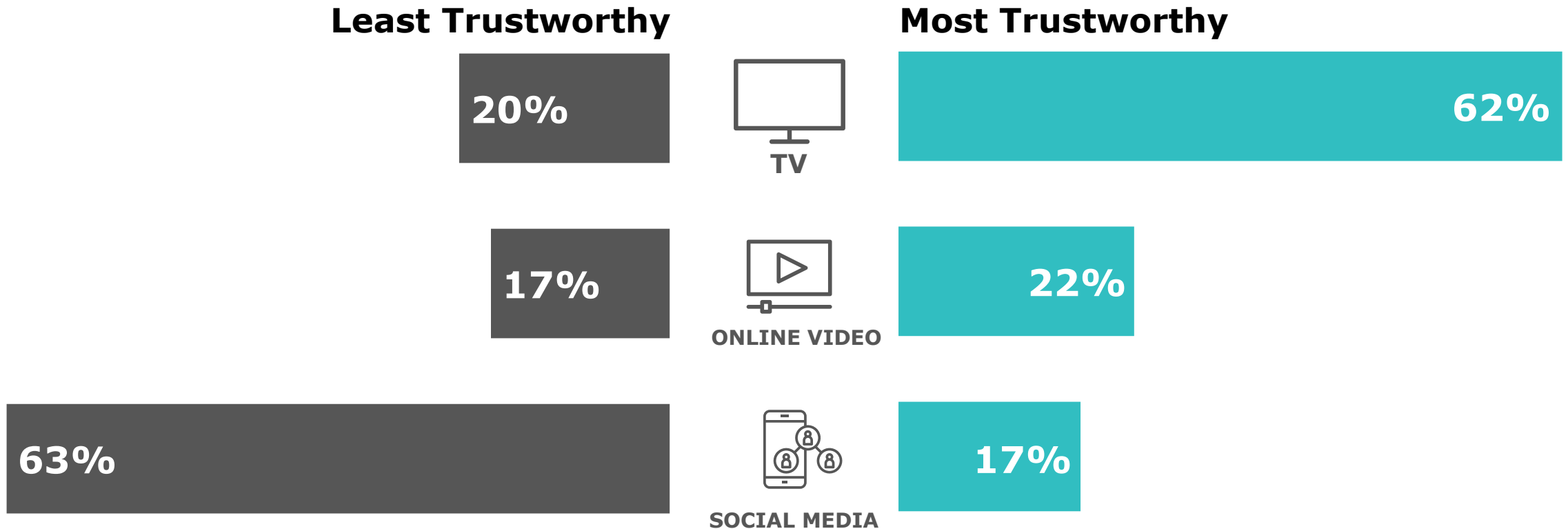


Q: Which *ONE* of the following media carries advertising that is most likely to make you **WANT TO BUY** the product?  
not listed are: "Other" @ 33%; includes newspaper, radio, search & OOH.



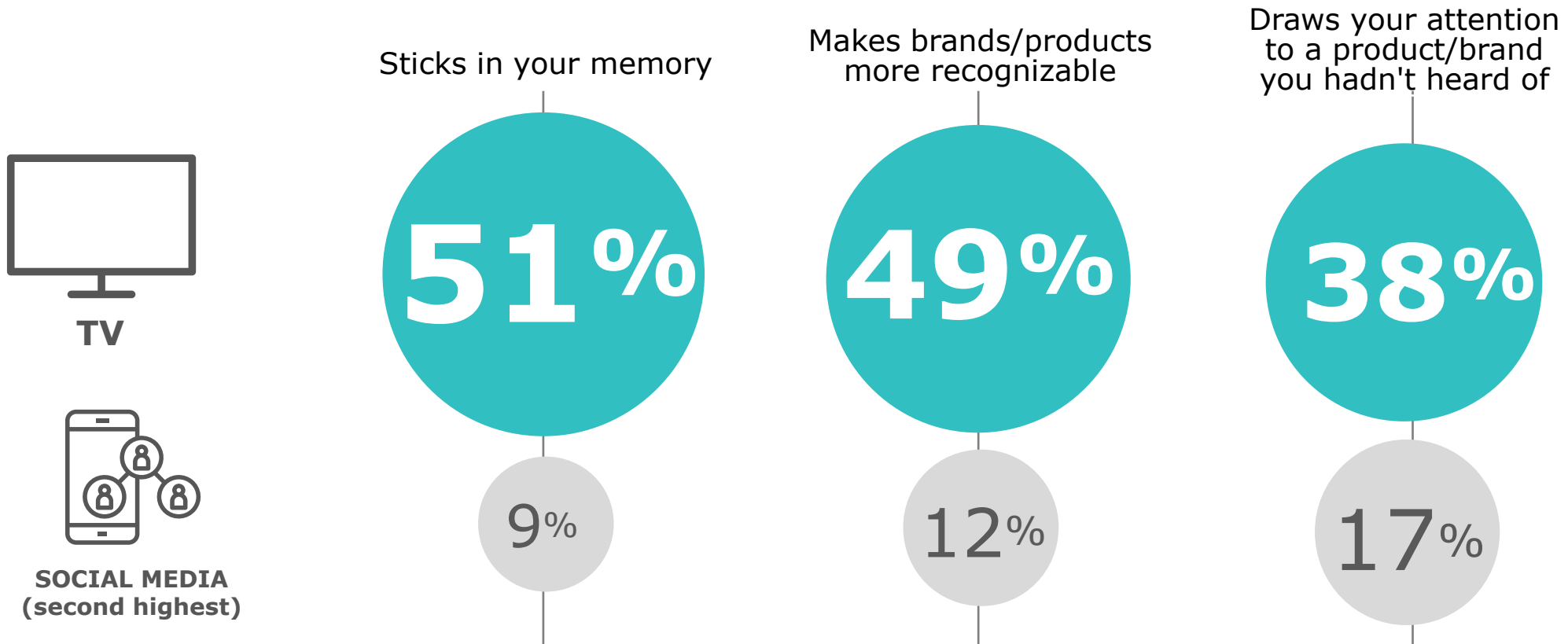
# tv is the most trusted medium

(while social media is the least trusted)



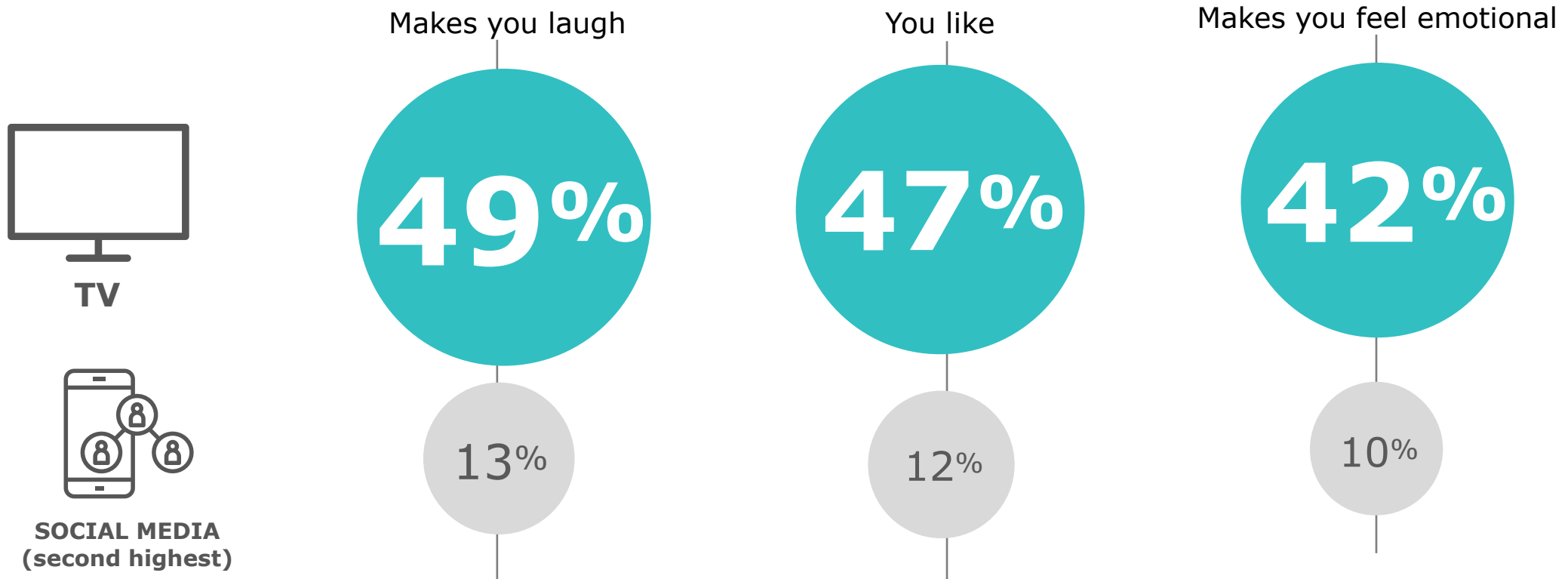
Which one of the following media carries video advertising that you believe to be most trustworthy? least trustworthy?

# **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...?*

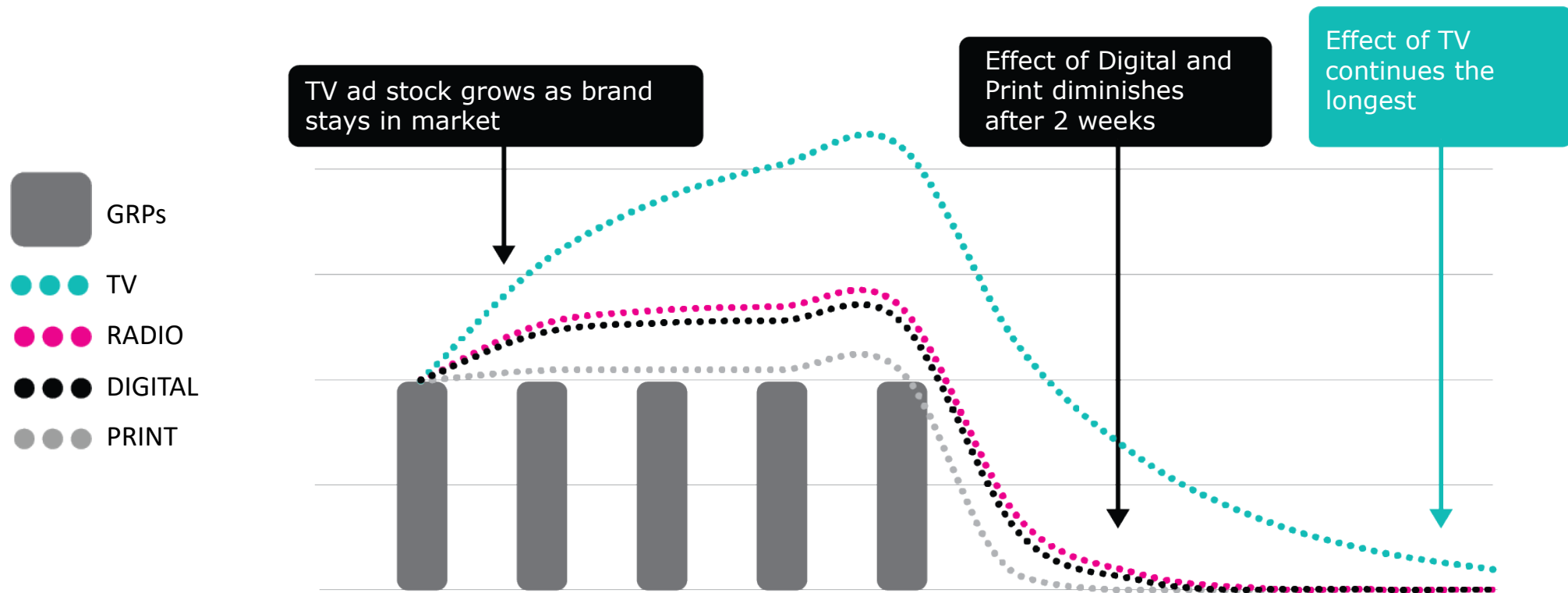
# **tv** advertising is the most likely to generate emotion and conversation



*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



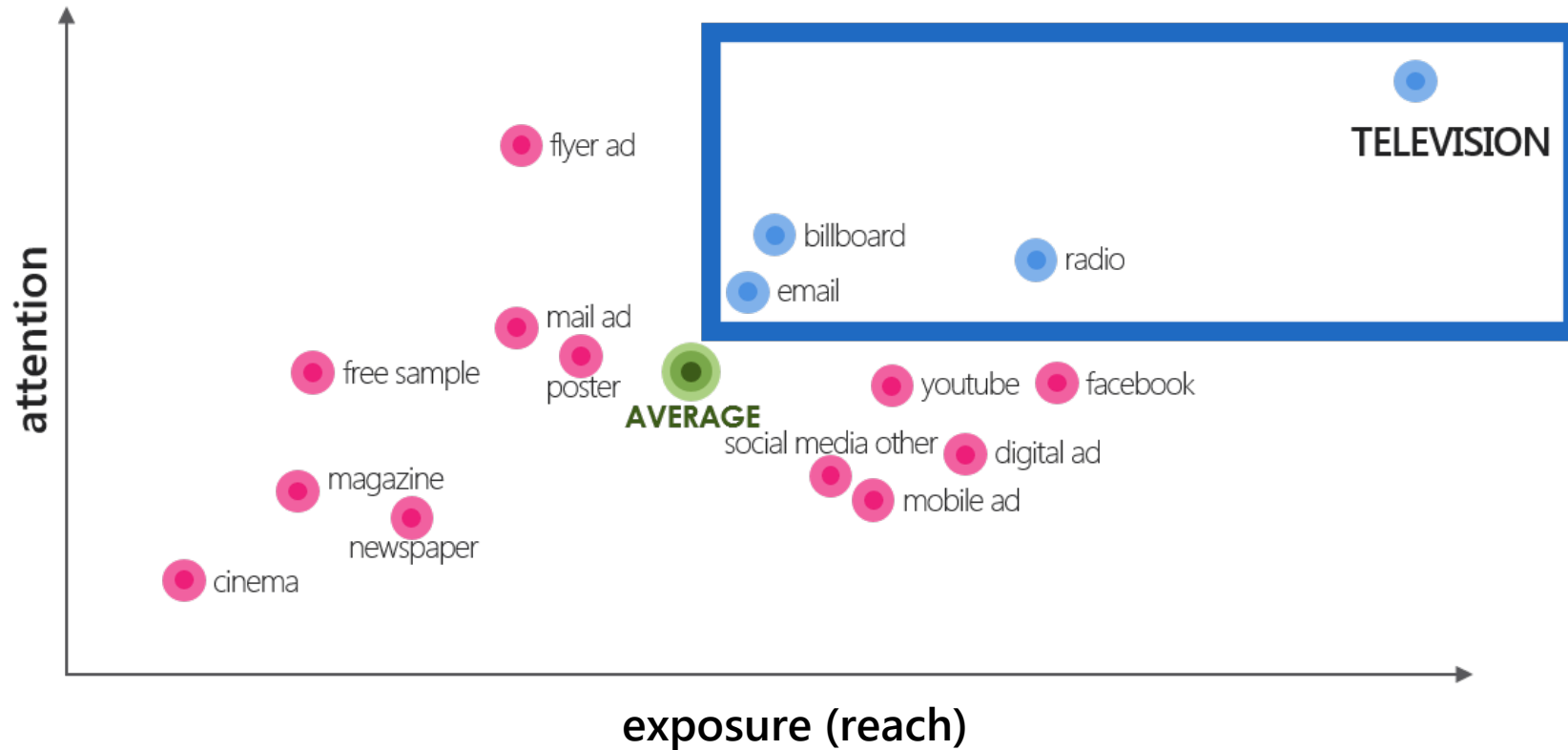


# tv is king

## when it comes to exposure & attention

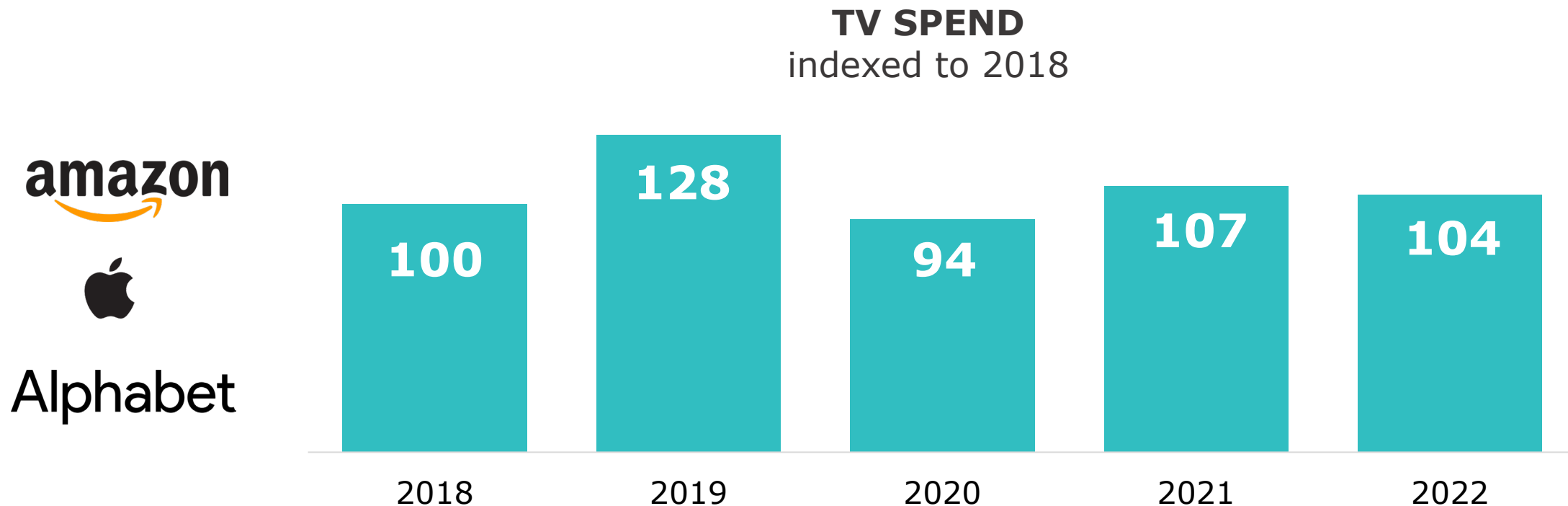
Each medium delivers some combination of reach (exposure) and consumer attention.

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

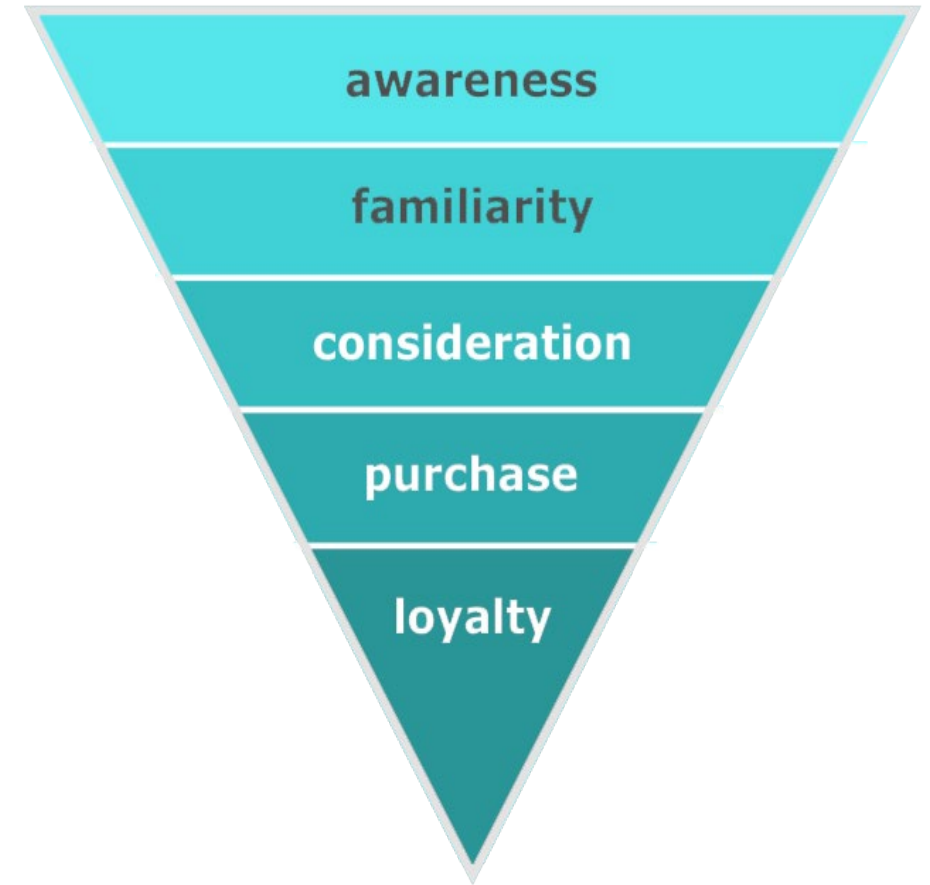
## TV is your best store-front window

### 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

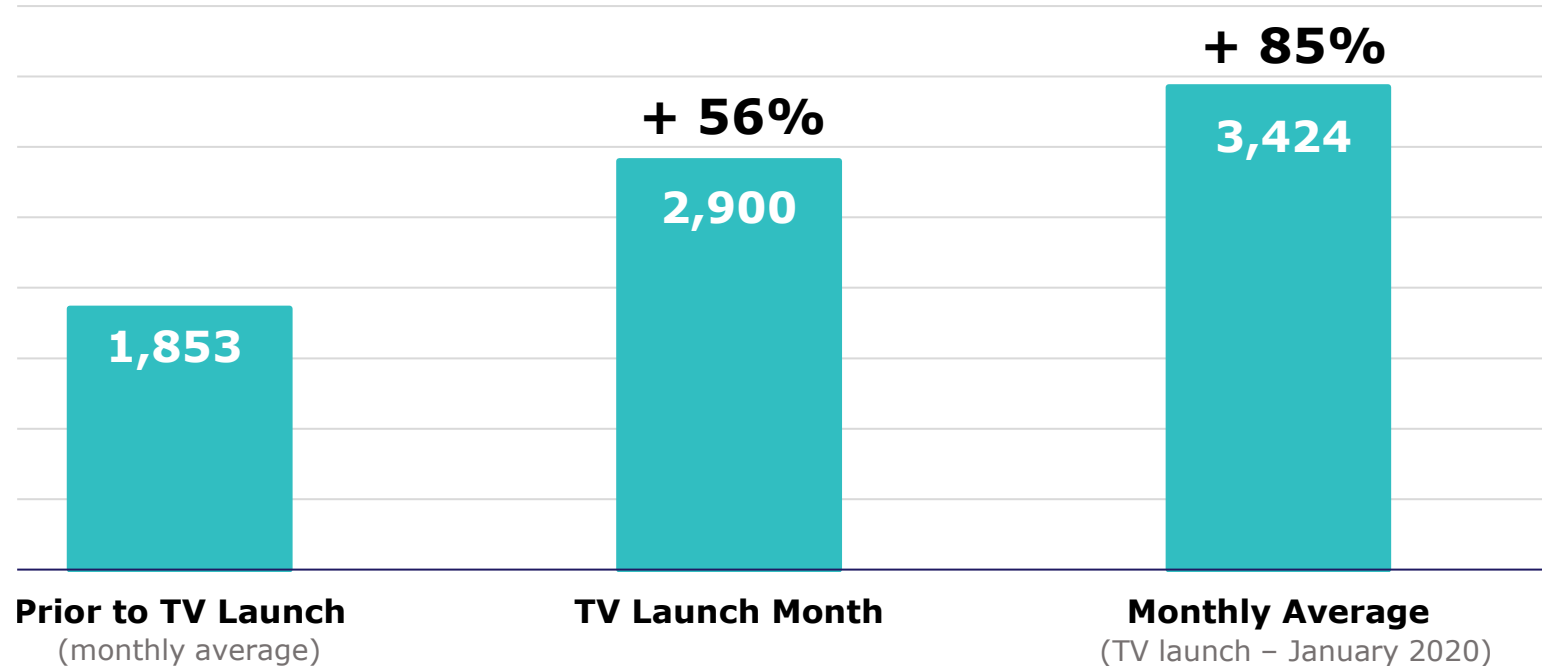
# tv drives the growth

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.



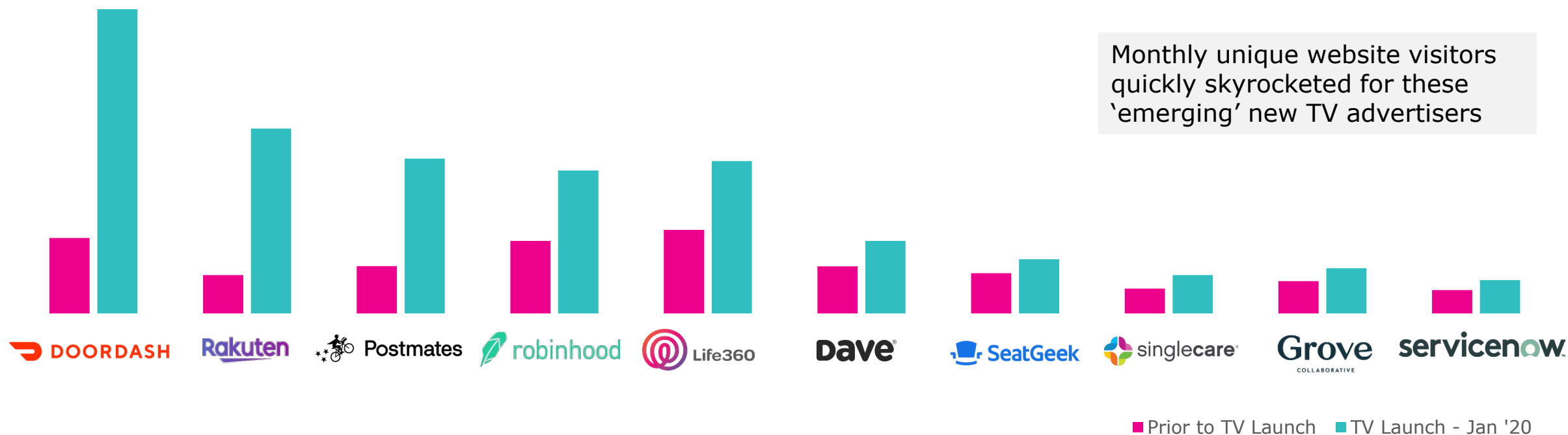
VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Feb '18 – Jan '20 (calendar months). VAB analysis of Comscore mediametrix multiplatform media trend data, total audience (Desktop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

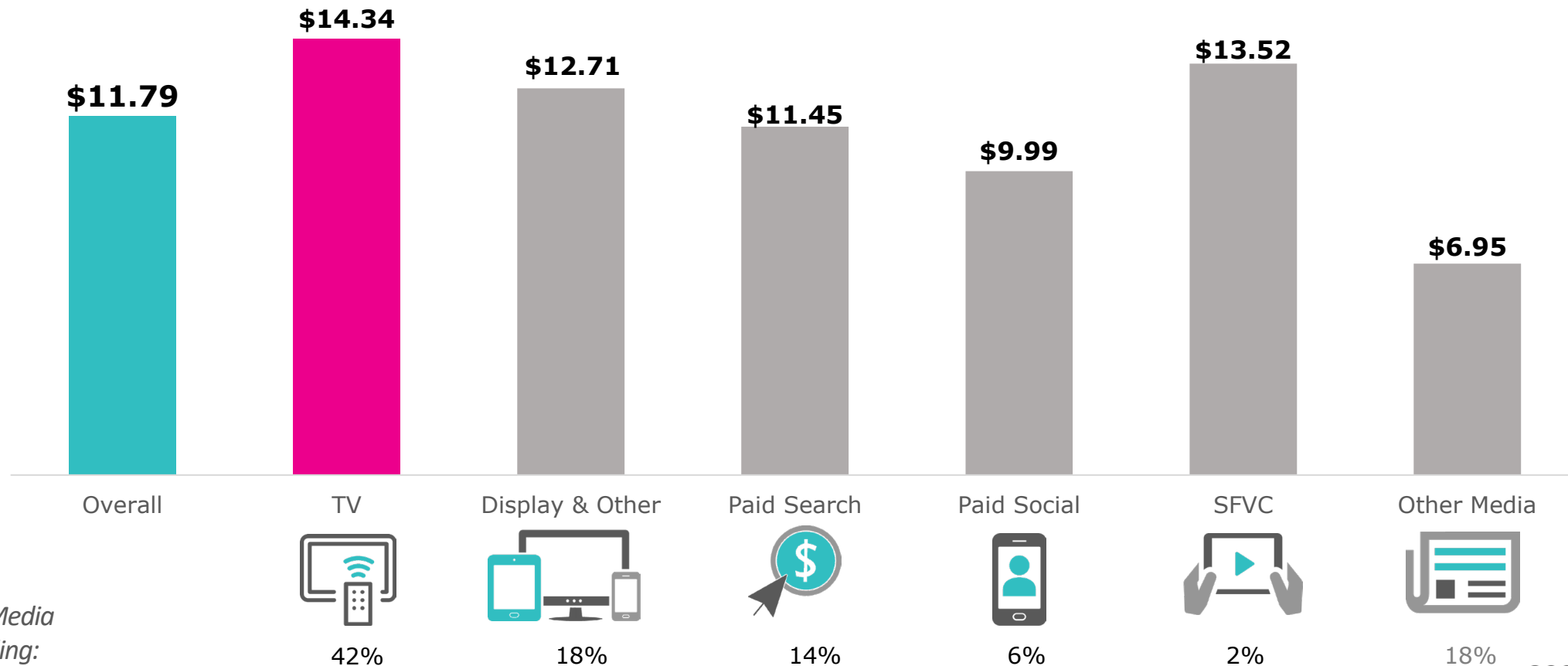


think<sup>tv</sup>

# 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

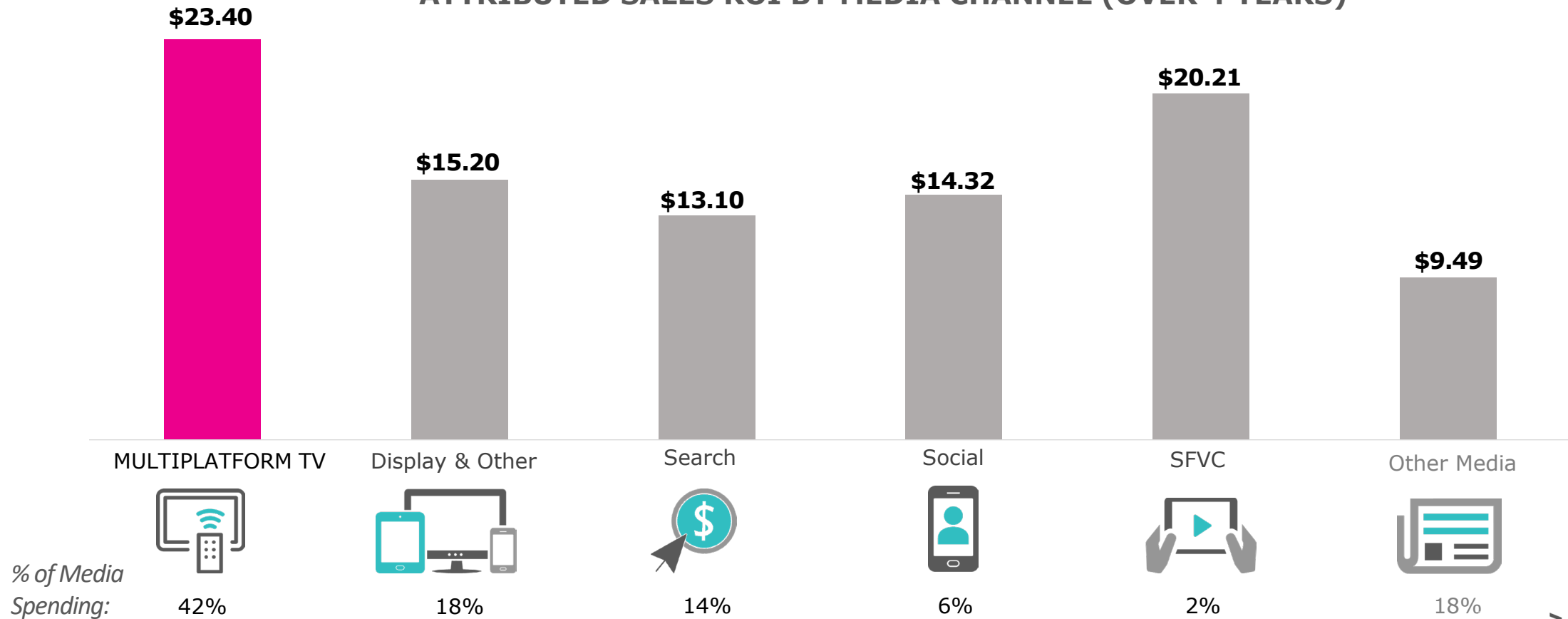


% of Media  
Spending:

# tv delivers the best ROI

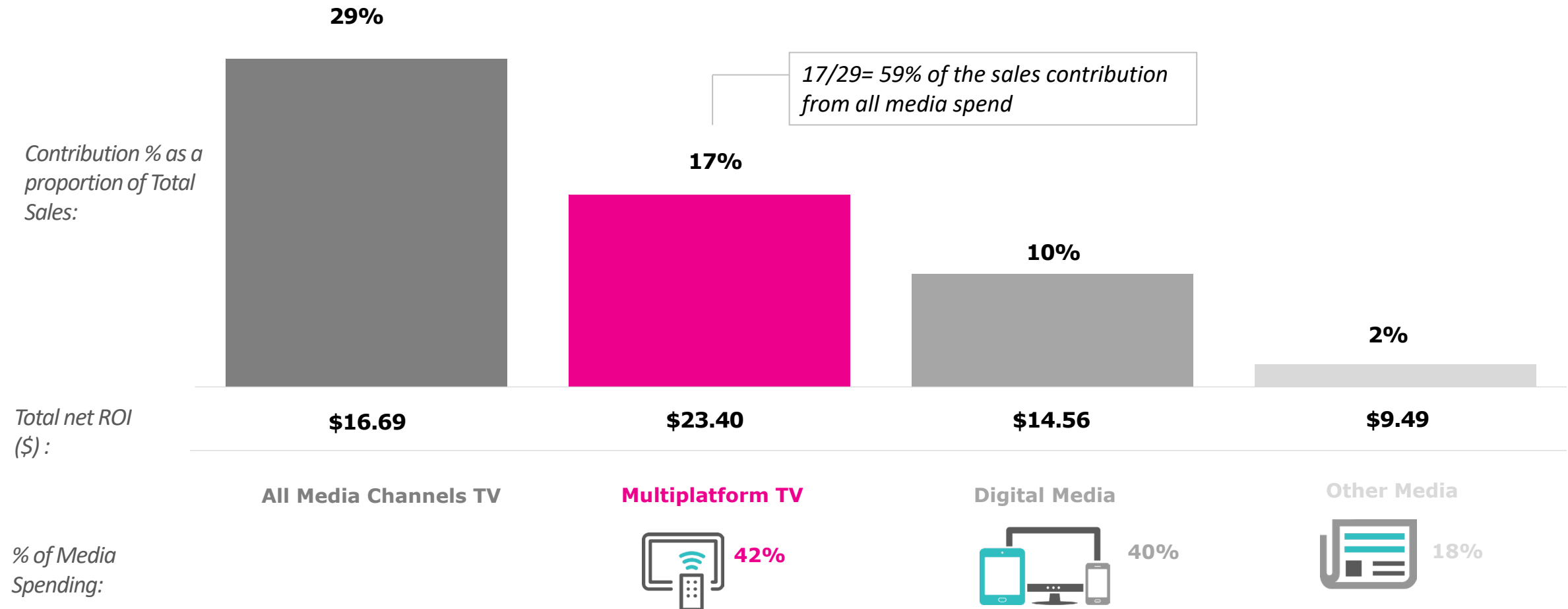
In the long term, TV's ROI grows to \$23.40

ATTRIBUTED SALES ROI BY MEDIA CHANNEL (OVER 4 YEARS)





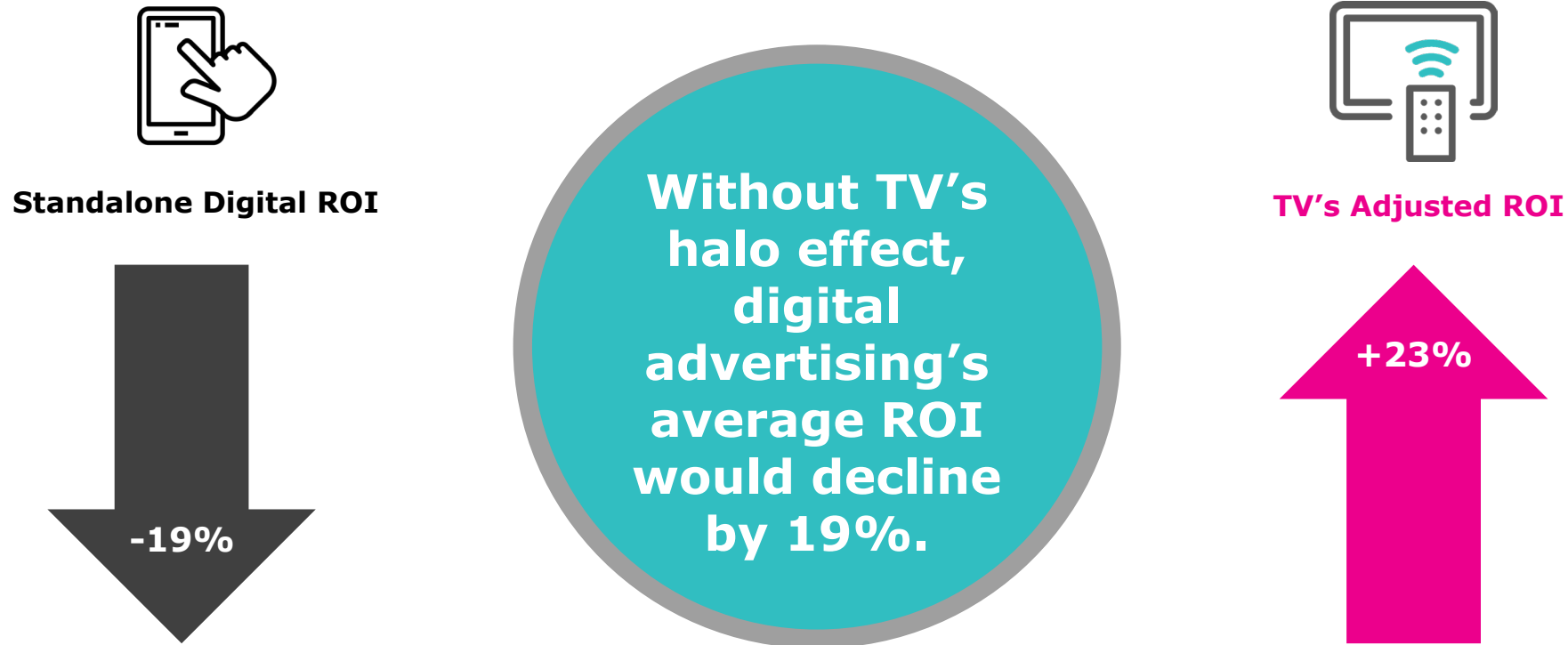
# Represents 42% of spend, but 58% of the sales contribution from the media



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 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 »](#)

## 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 »](#)

## effectiveness in context

This Peter Field core 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 »](#)

## attention in advertising

Advertising is critical – if your ad goes unnoticed, it simply cannot make an impact. In this new research Karen Nelson-Field, PHD, Founder and CEO at Amplified Intelligence, confirms again the superior attention TV and BVOD garner compared to other media.

[learn more »](#)

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