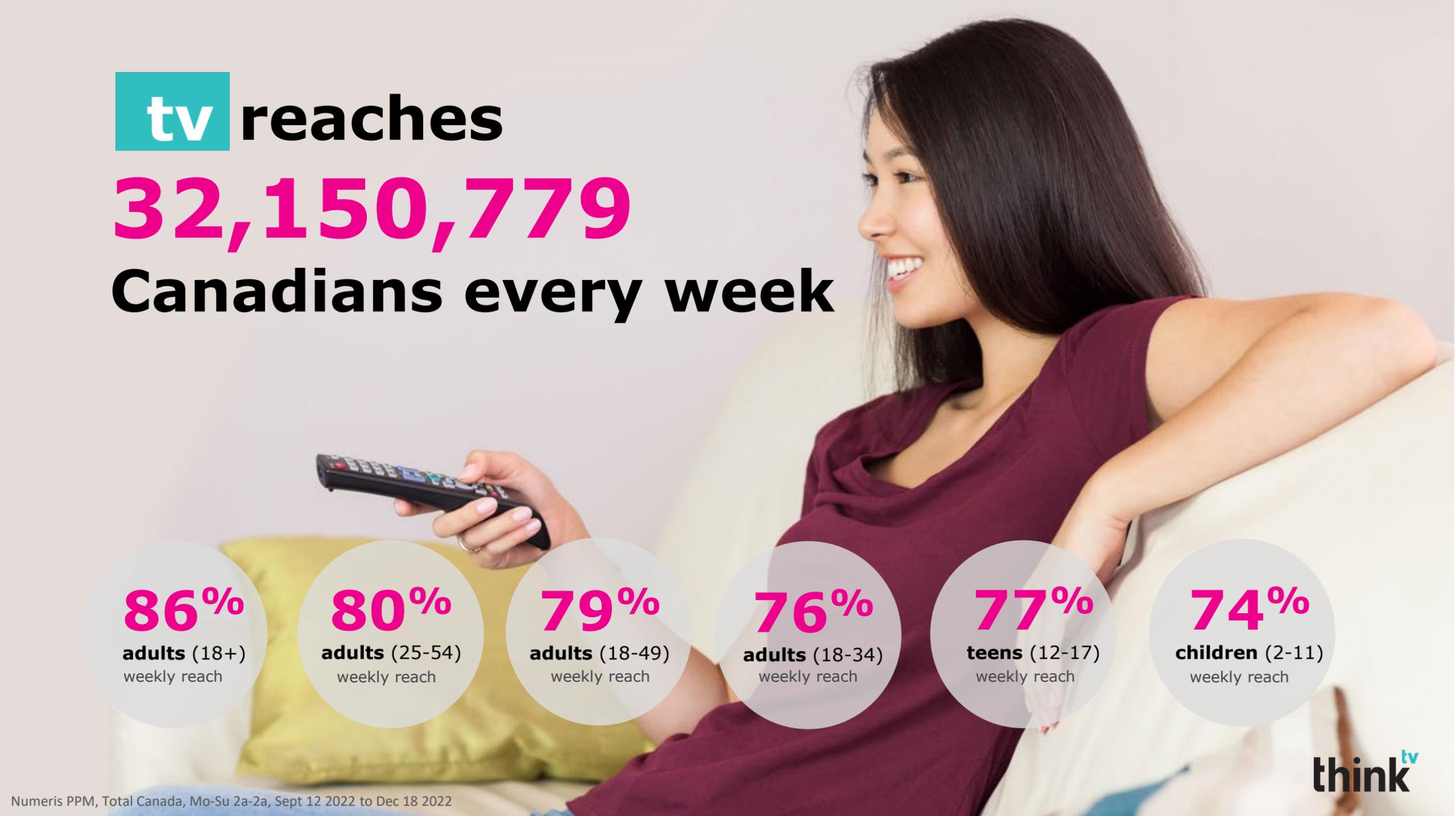


A blurred background image of a family sitting on a couch. In the foreground, a hand holds a black remote control, and another hand holds a glass bowl of popcorn. The text 'the power of tv' is overlaid on the image.

**the power of**



in an attention economy



**tv reaches**  
**32,150,779**  
**Canadians every week**

**86%**

**adults (18+)**  
weekly reach

**80%**

**adults (25-54)**  
weekly reach

**79%**

**adults (18-49)**  
weekly reach

**76%**

**adults (18-34)**  
weekly reach

**77%**

**teens (12-17)**  
weekly reach

**74%**

**children (2-11)**  
weekly reach

**think**tv

**707**  
**million**  
**hours**  
time spent  
with tv last week

**85%**  
**Canadians**  
**2+**  
tv's weekly  
reach

think<sup>tv</sup>



the average **tv** campaign delivers

**342**  
**million**  
**impressions**

think<sup>tv</sup>

**tv** is powerful because it **delivers:**

**reach**

**impact**

**demand**

**efficiency**

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

# reach

**32.2 Million Canadians  
each week**



think<sup>tv</sup>



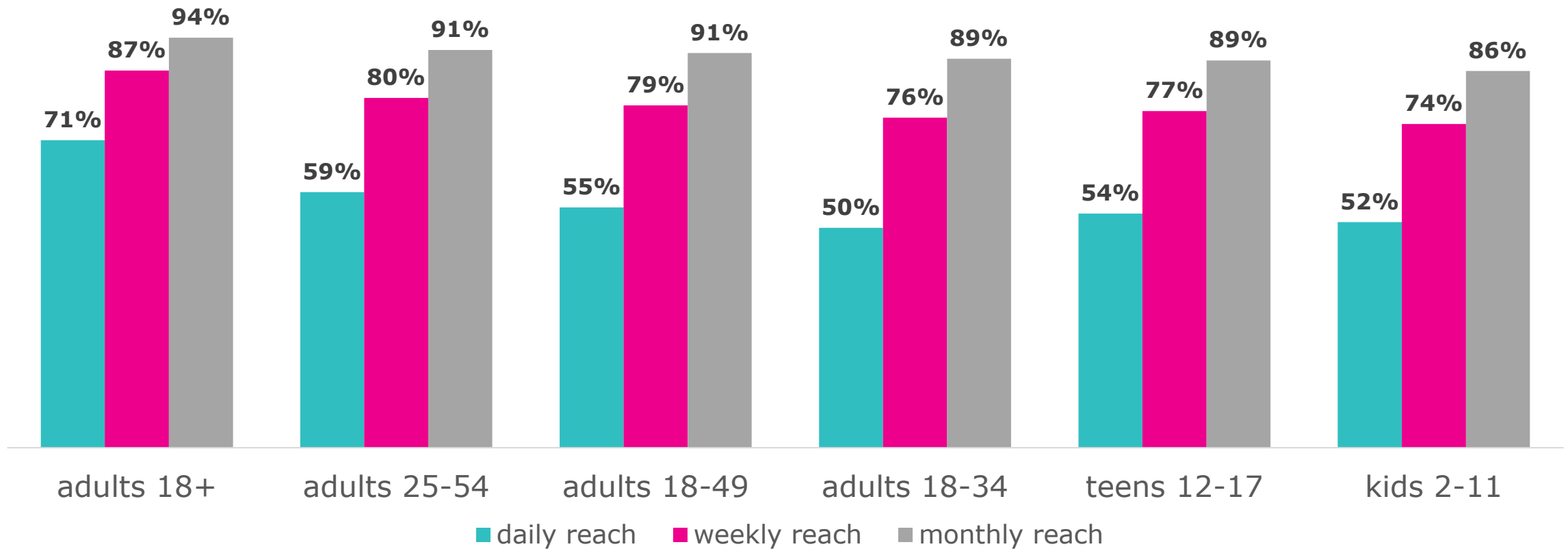
**Marketing activities only  
build mental availability in  
the audience they reach.**

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

Byron Sharp  
Professor of Marketing Science, University of South Australia

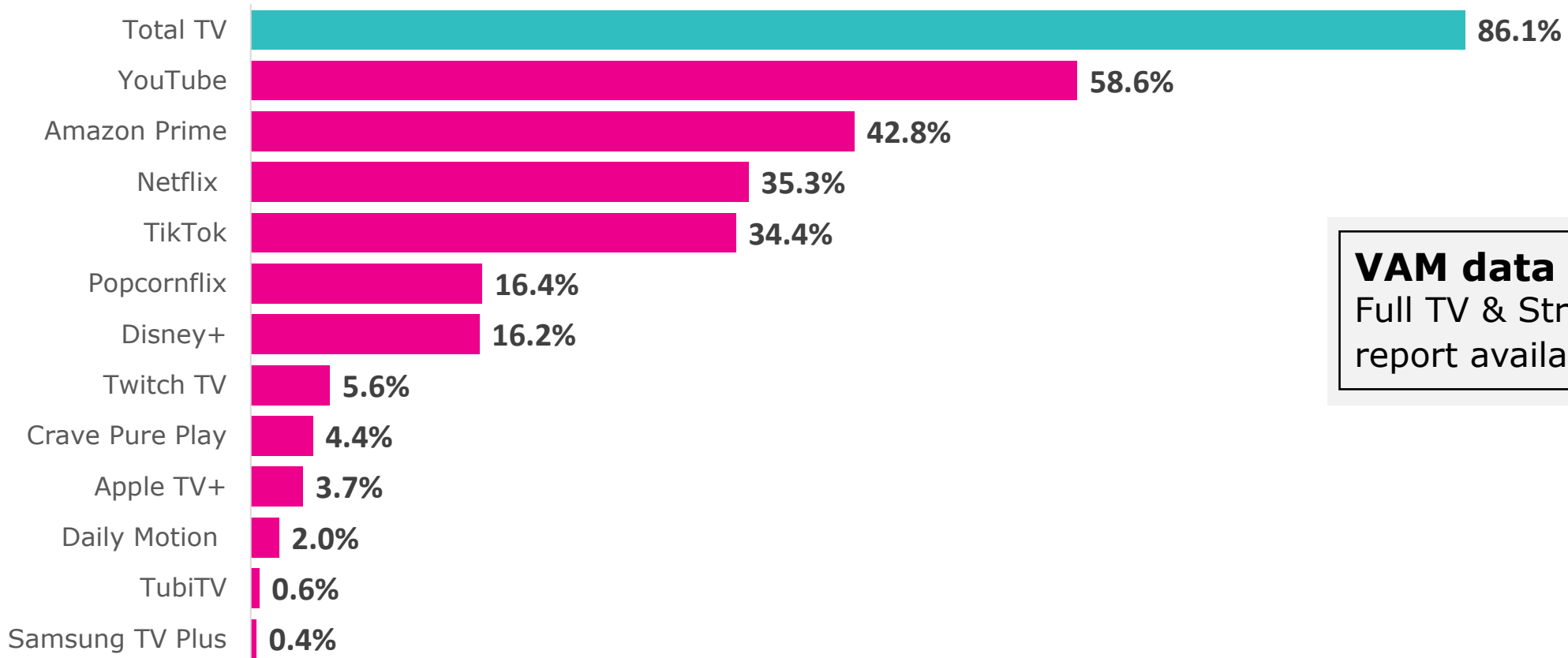
# **tv** reaches **94%** of Canadians (18+)

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

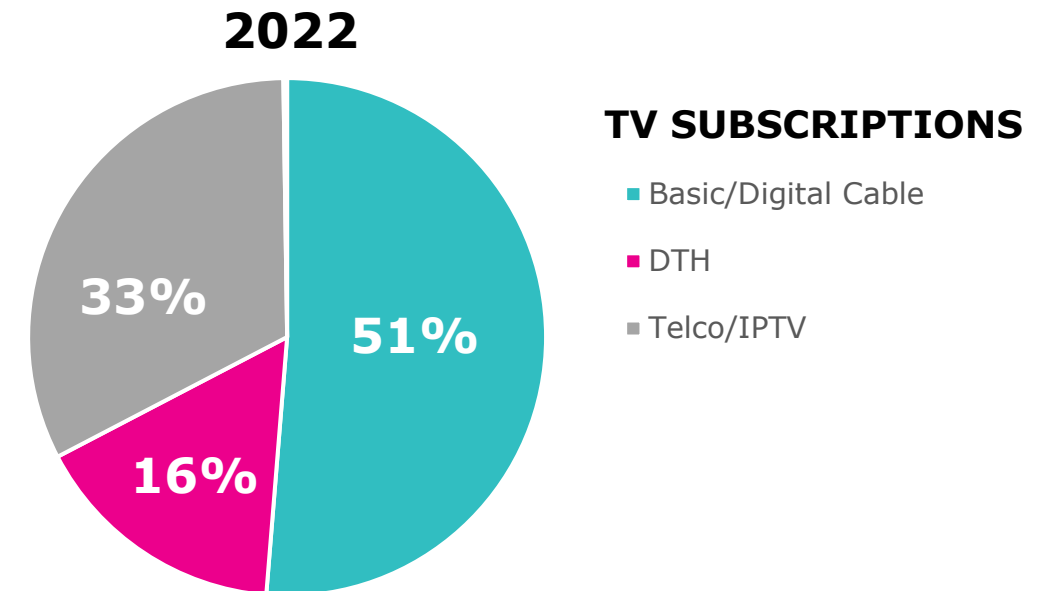
Source: Numeris VAM, Sept-Nov 2022

# 10.2 million paid **tv** subscriptions

**Cord cutting has been far overstated: Total paid subs down only 2%.**

Additionally, two thirds of those without a pay TV subscription have access to a smart TV connected to the internet\*, extending access to linear TV even further.

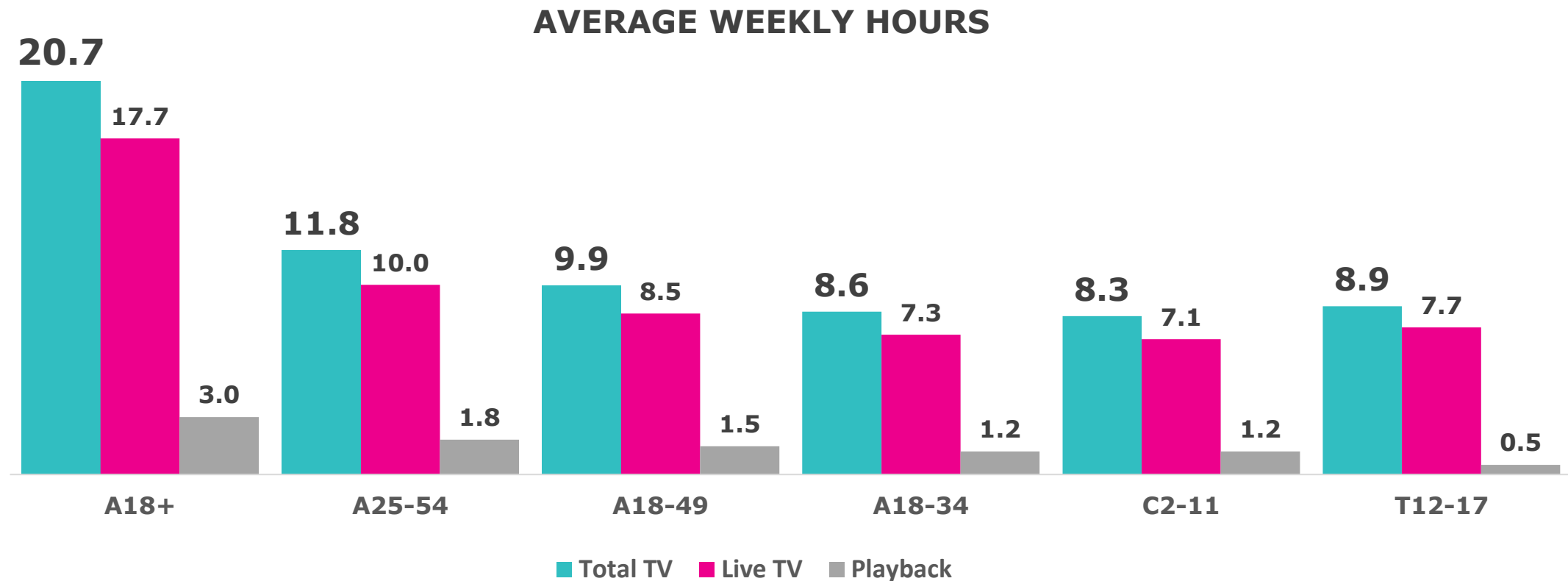
	June '21	June '22	Index
<b>Total Paid Subs</b>	10,370,353	10,201,983	<b>98</b>
Basic/Digital Cable	5,497,952	5,282,405	96
Satellite	1,786,392	1,654,445	93
Telco/IPTV	3,175,139	3,338,871	105
Other	23,953	23,928	100



# Canadians watch a lot of



and most of it is live

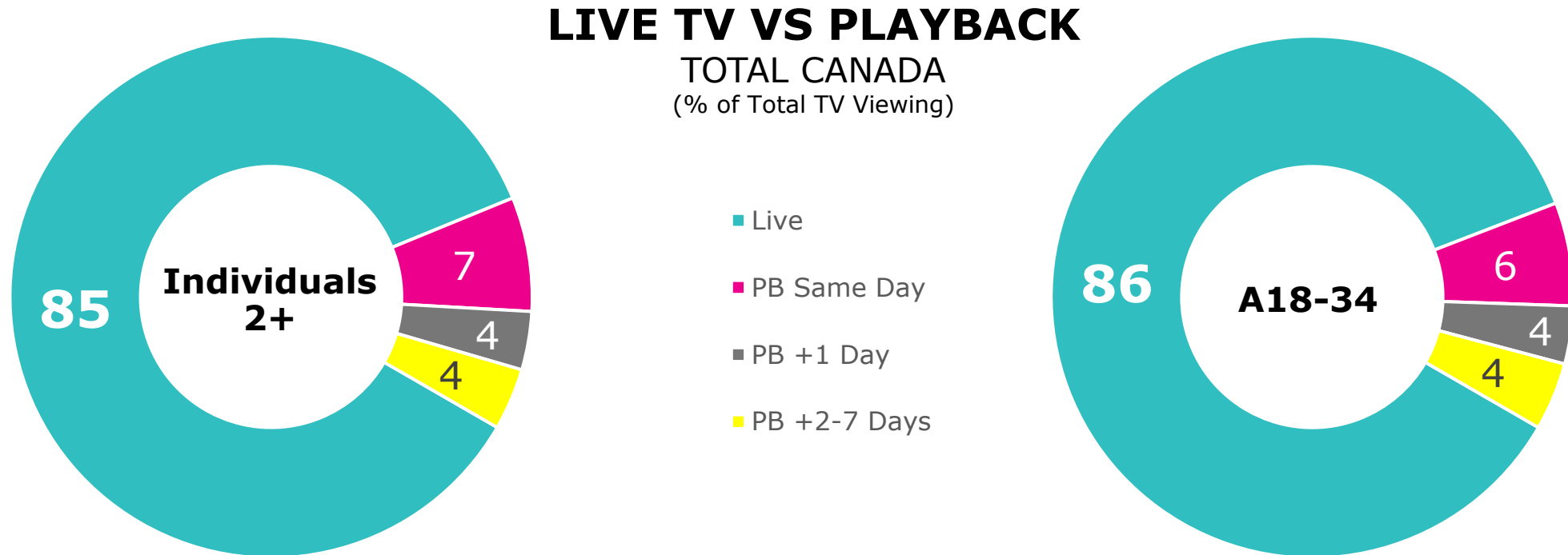


TV = viewing to any live broadcaster content (streamed on any platform and linear TV) plus any broadcaster content recorded on PVR (with commercial load intact) that is viewed within 7 days of initial broadcast. Does not include on demand streaming.

Canada | Numeris PPM, Total Hours(000) Sep 12-Dec 18 2022 | PB = Playback

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

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



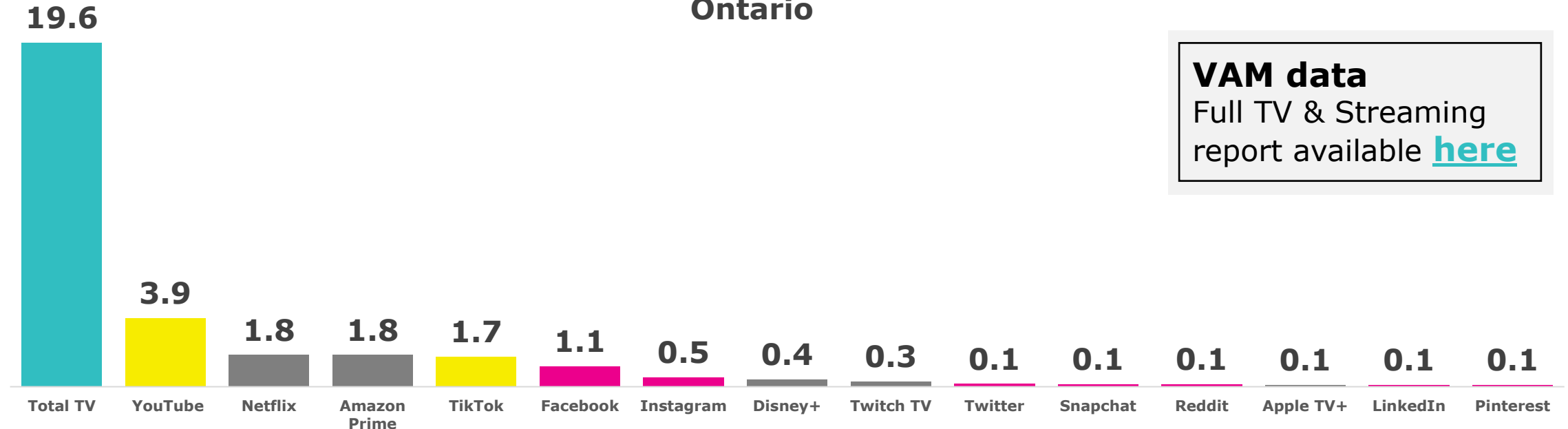
TV = viewing to any live broadcaster content (streamed on any platform and linear TV) plus any broadcaster content recorded on PVR (with commercial load intact) that is viewed within 7 days of initial broadcast. Does not include on demand streaming.

Canada | Numeris PPM, Total Hours(000) Sep 12-Dec 18 2022 | PB = Playback

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

**ADULTS 18+**  
AVERAGE WEEKLY HOURS  
**Ontario**

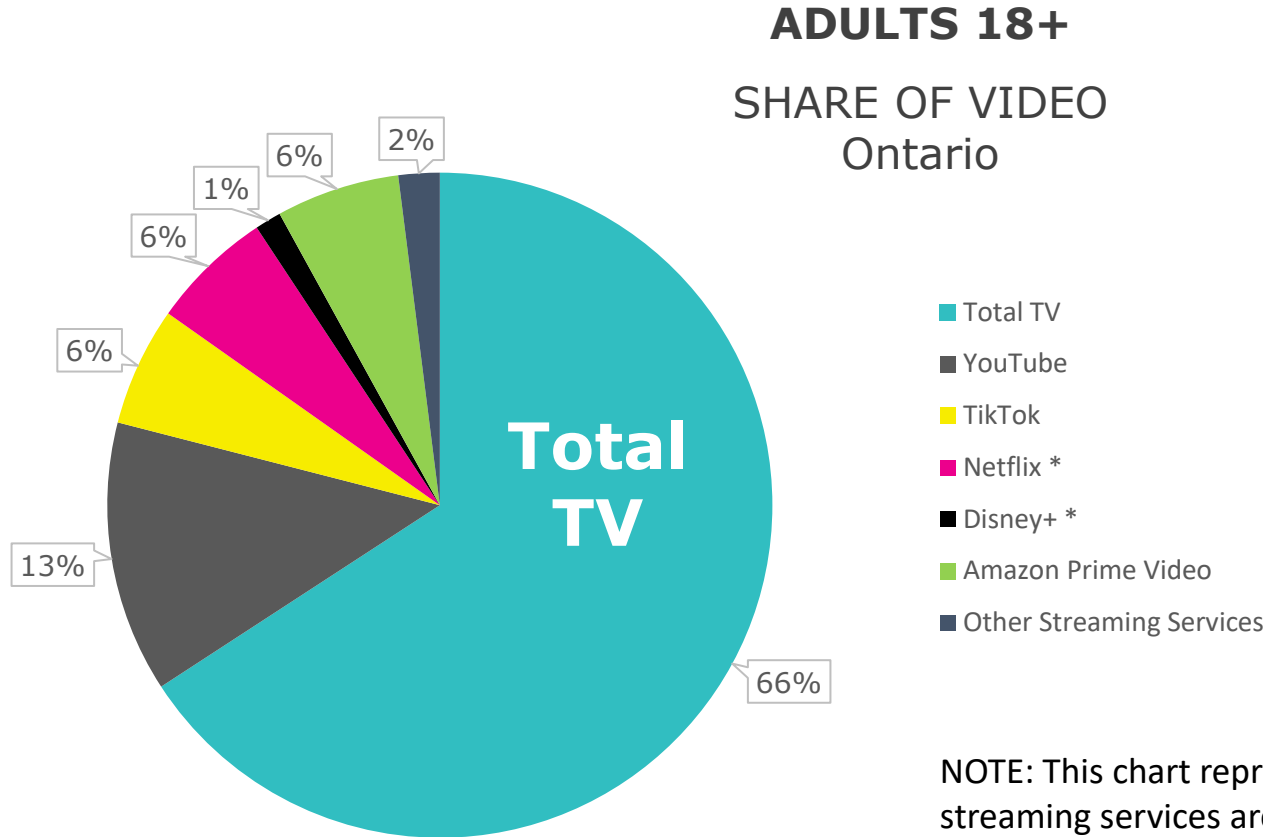
**VAM data**  
Full TV & Streaming  
report available [here](#)



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, Sept-Nov 2022 for Total TV, Streaming Services, YouTube, and TikTok; and  
Comscore, Sept – Nov 2022 for Social Media (Facebook, Instagram, Twitter, Snapchat, Reddit, LinkedIn, Pinterest)



# 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, Sept-Nov 2022 for Total TV, Streaming Services, YouTube, and TikTok



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

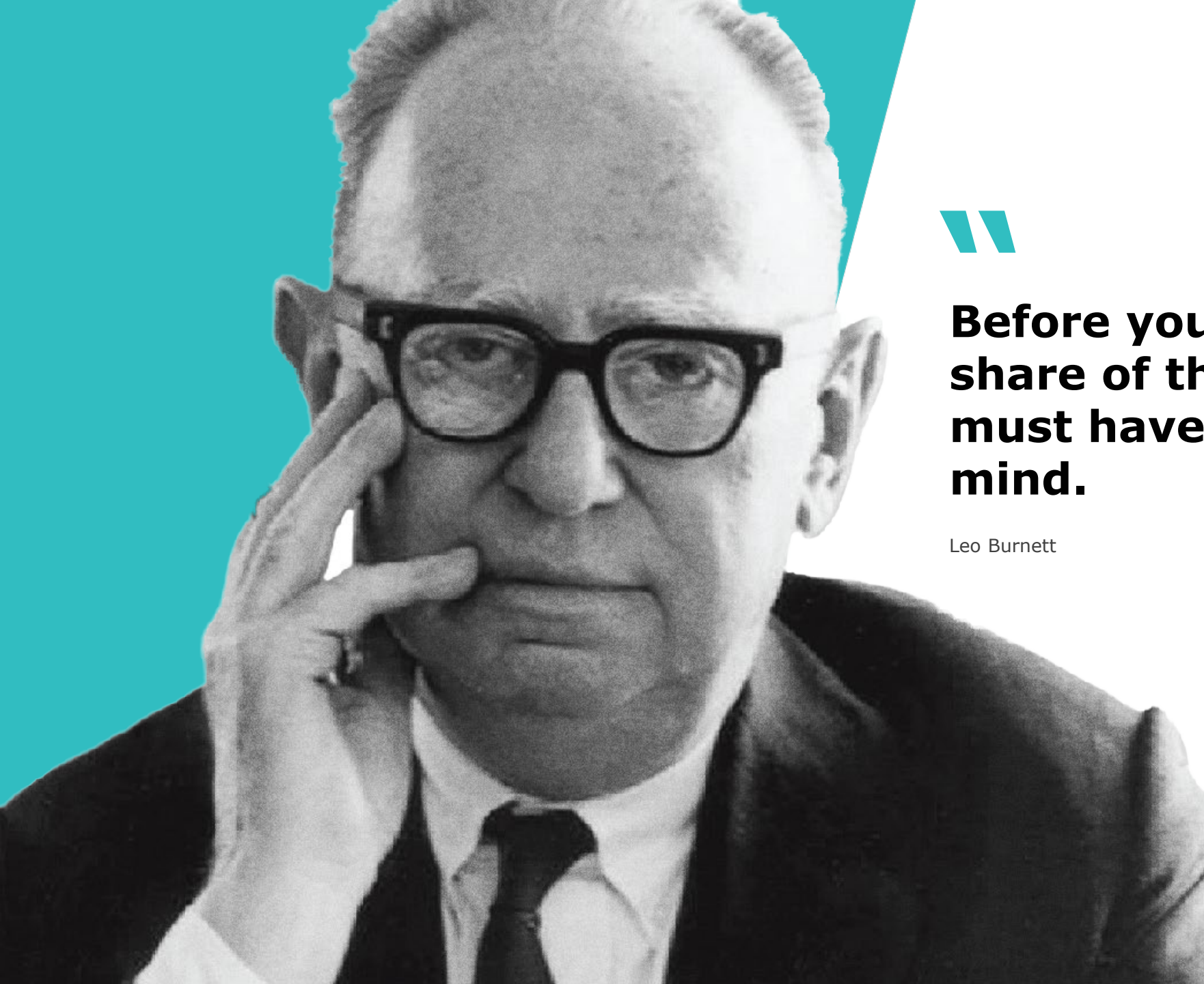
Mark Ritson  
Marketing & Branding Expert, Columnist, Consultant and Professor

# 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.**

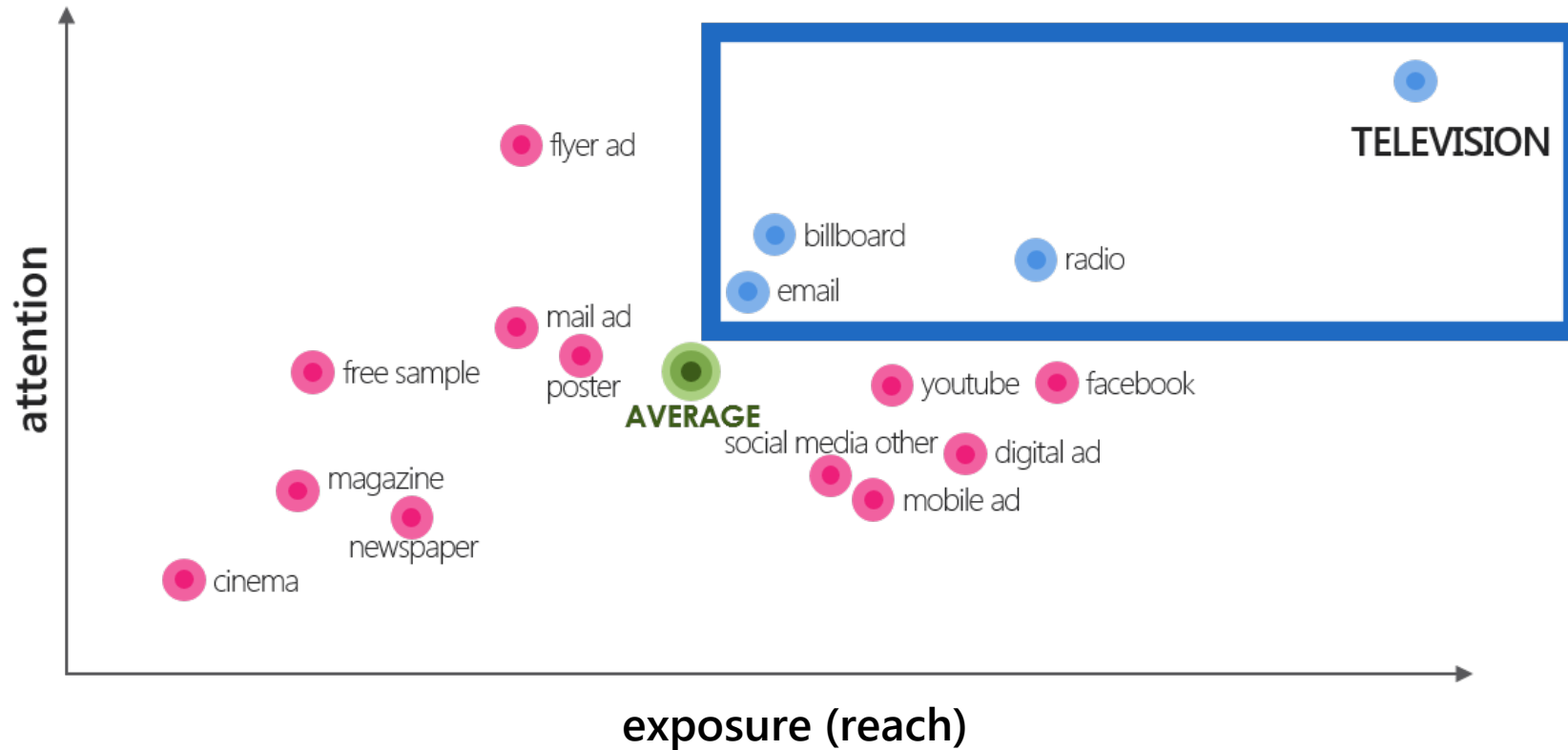
Leo Burnett

# tv is king

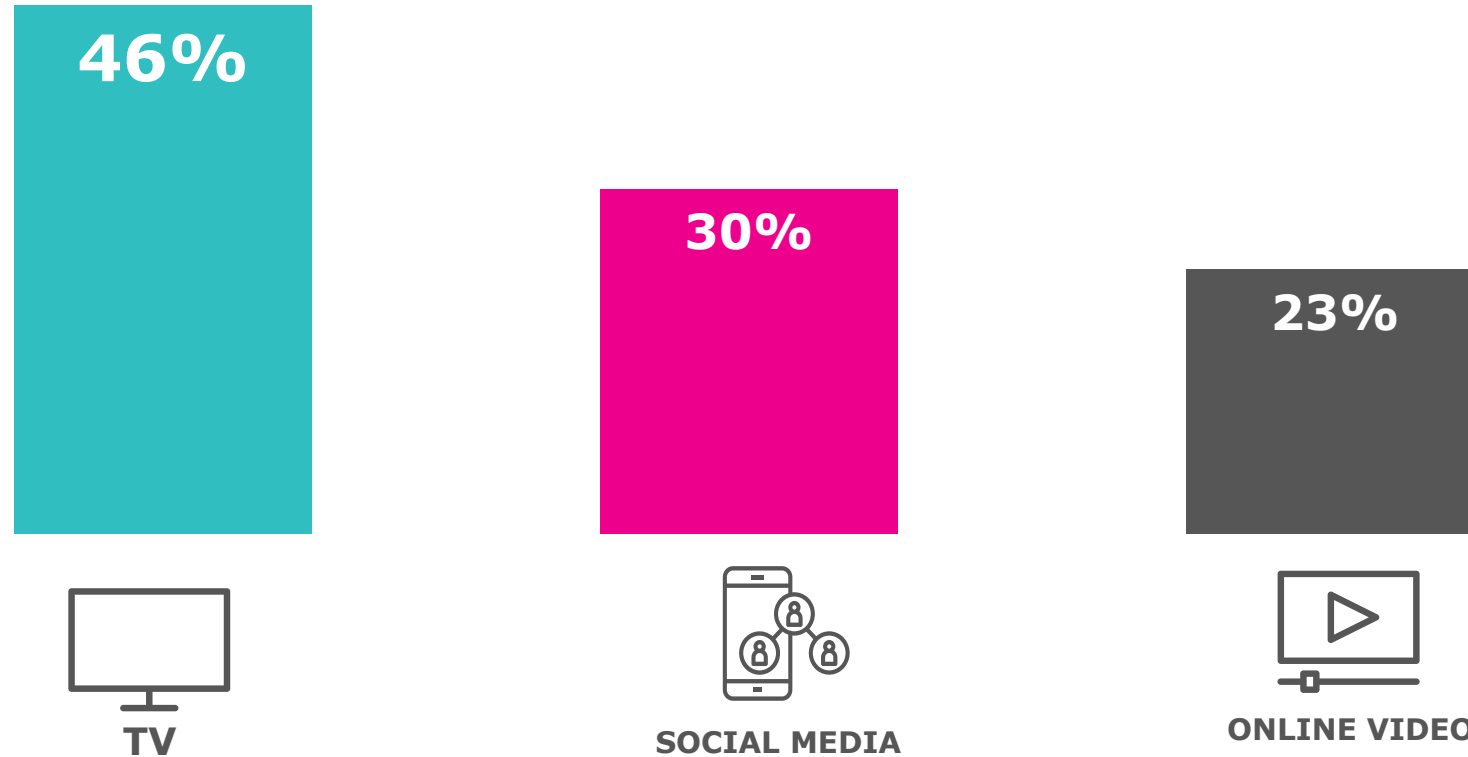
## when it comes to exposure & attention

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**.

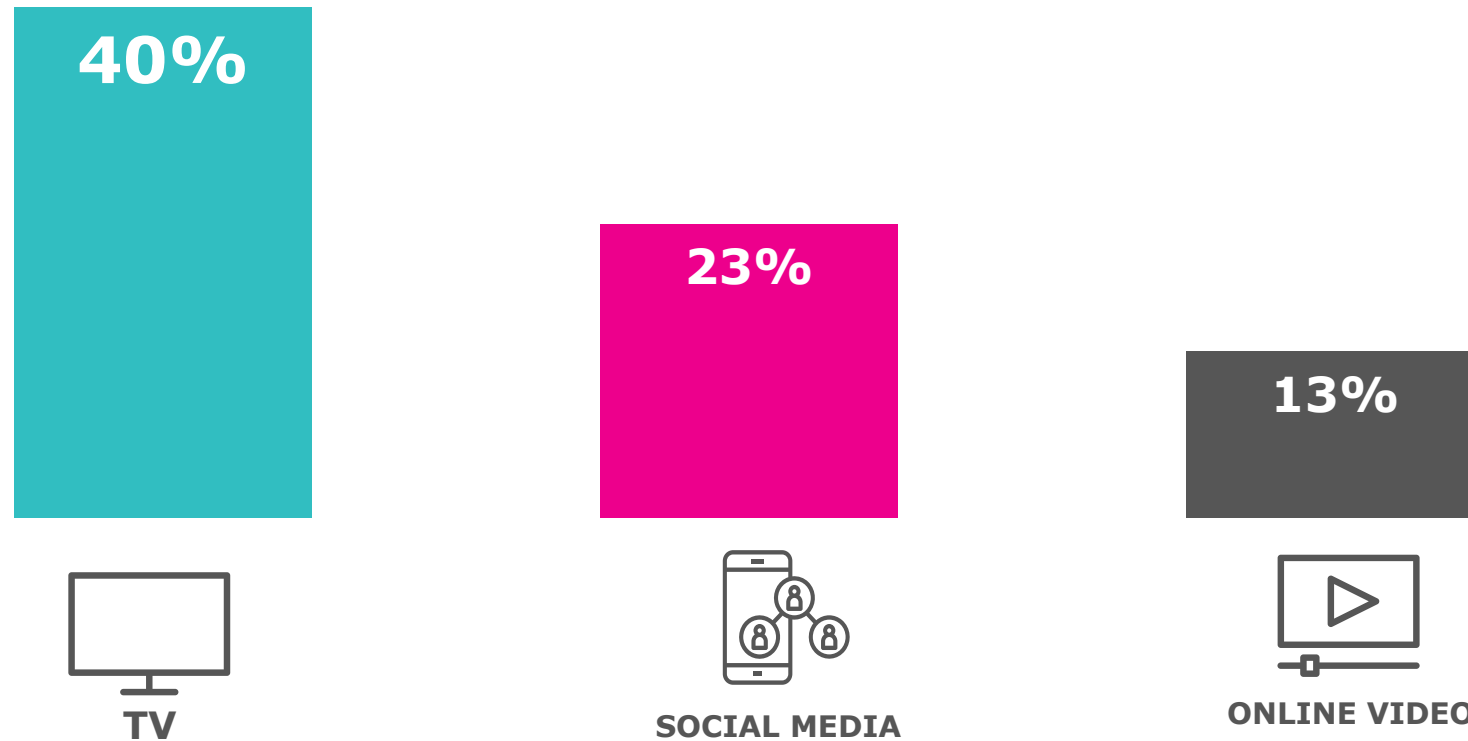


# tv ads get the most attention



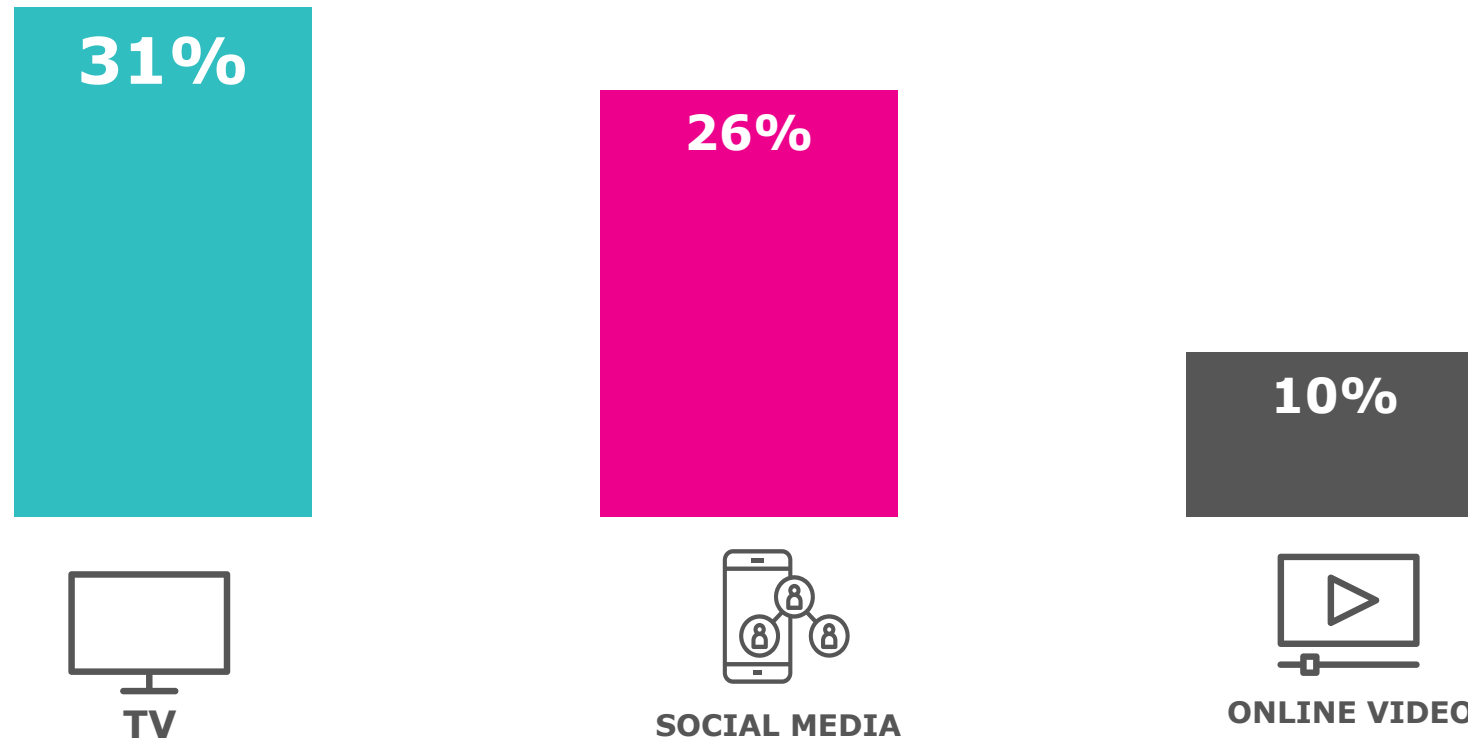
Q: Which ONE of the following media carries video advertising that best **captures your ATTENTION?**

# 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.

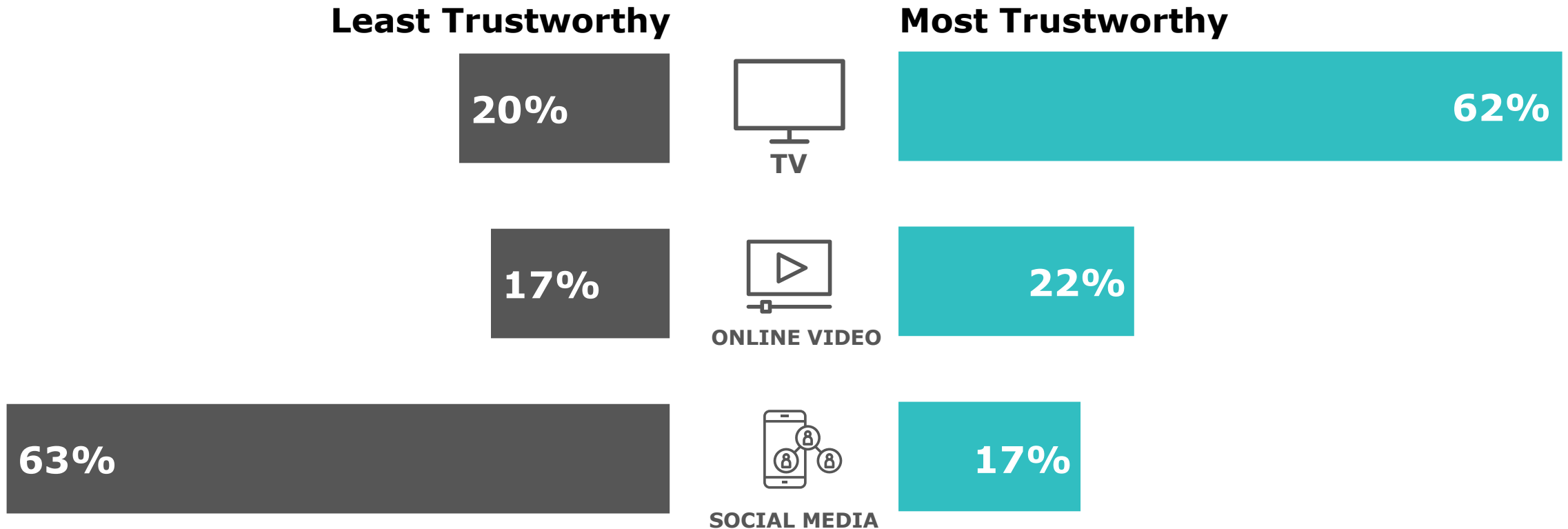
# **tv** is most likely to drive purchases



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

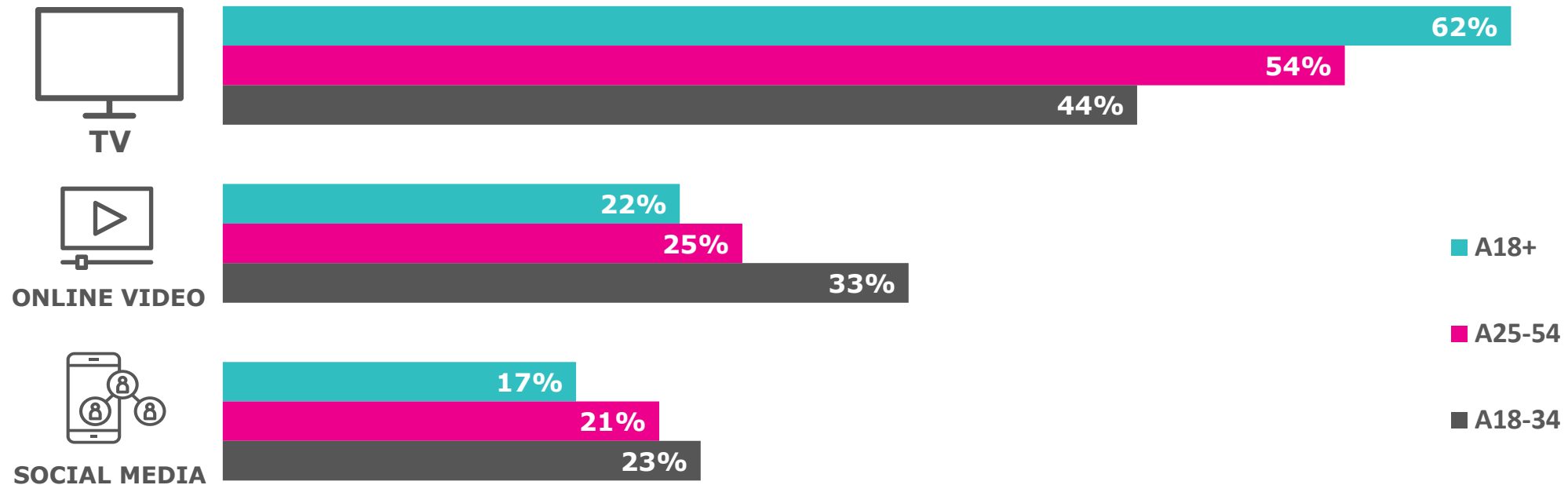
(while social media is the least trusted)



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

# tv is the most trusted video medium

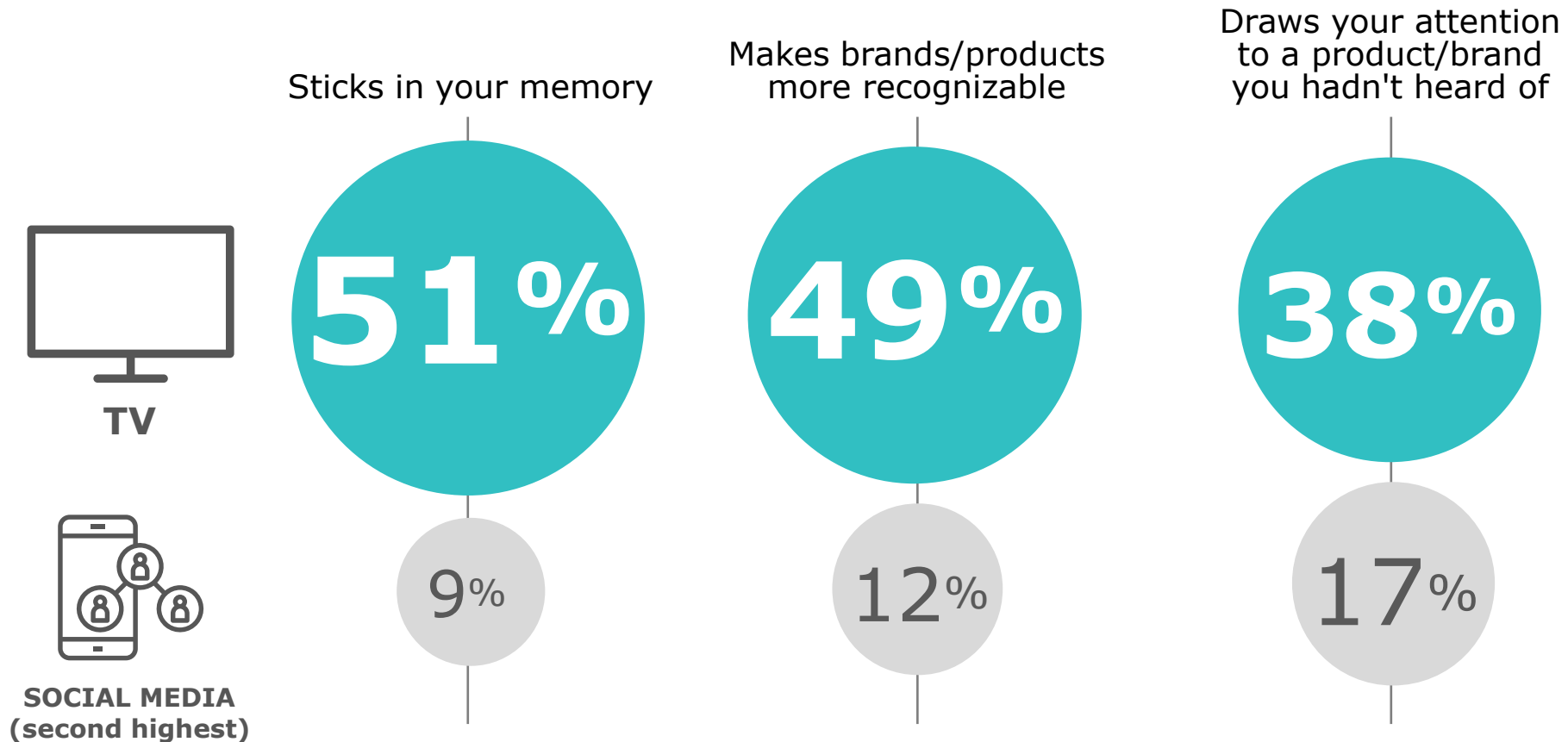
(by a long shot, and across every demo)



Q: Which ONE of the following media carries video advertising you believe to be **most TRUSTWORTHY**?

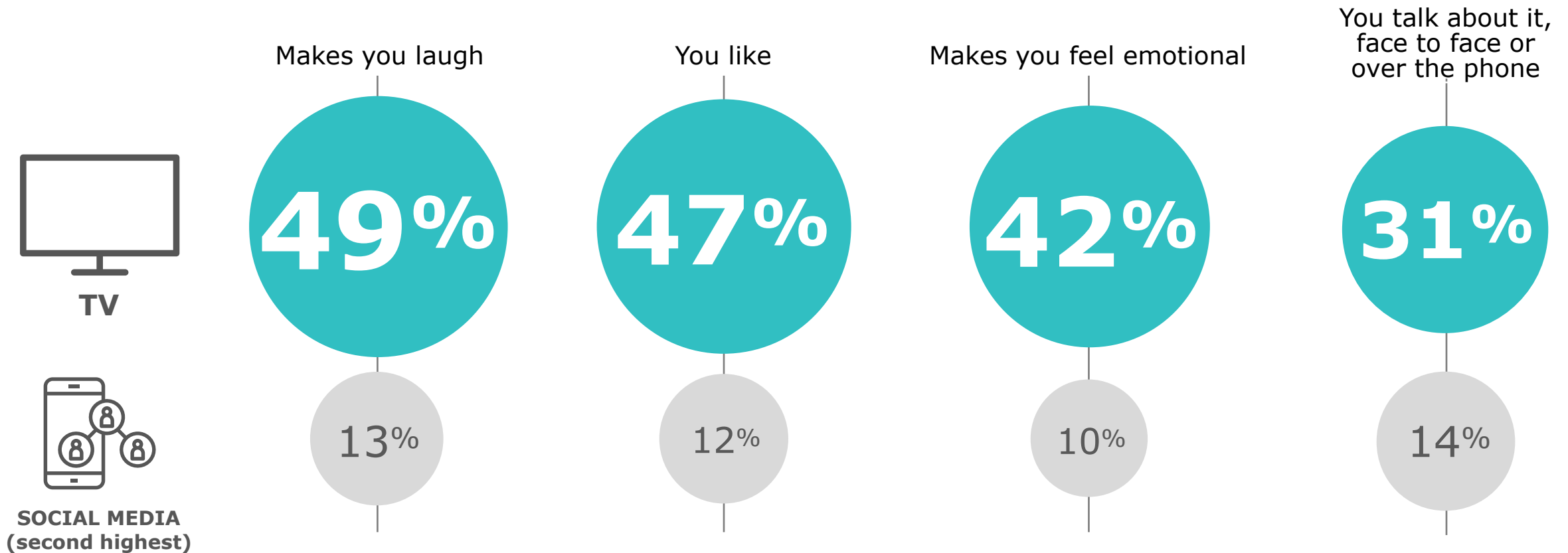
# tv advertising has significant impact

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



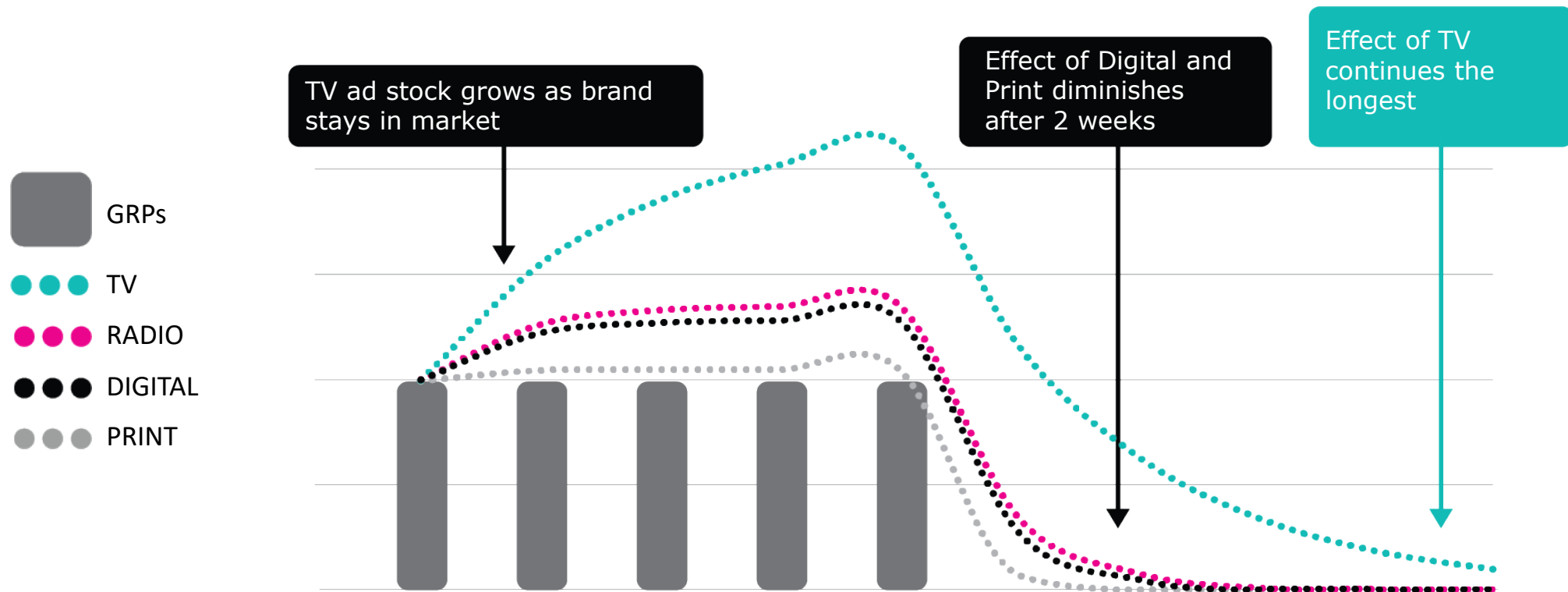
# **tv** advertising is the most likely to generate emotion and conversation

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



# tv ads deliver the biggest impact

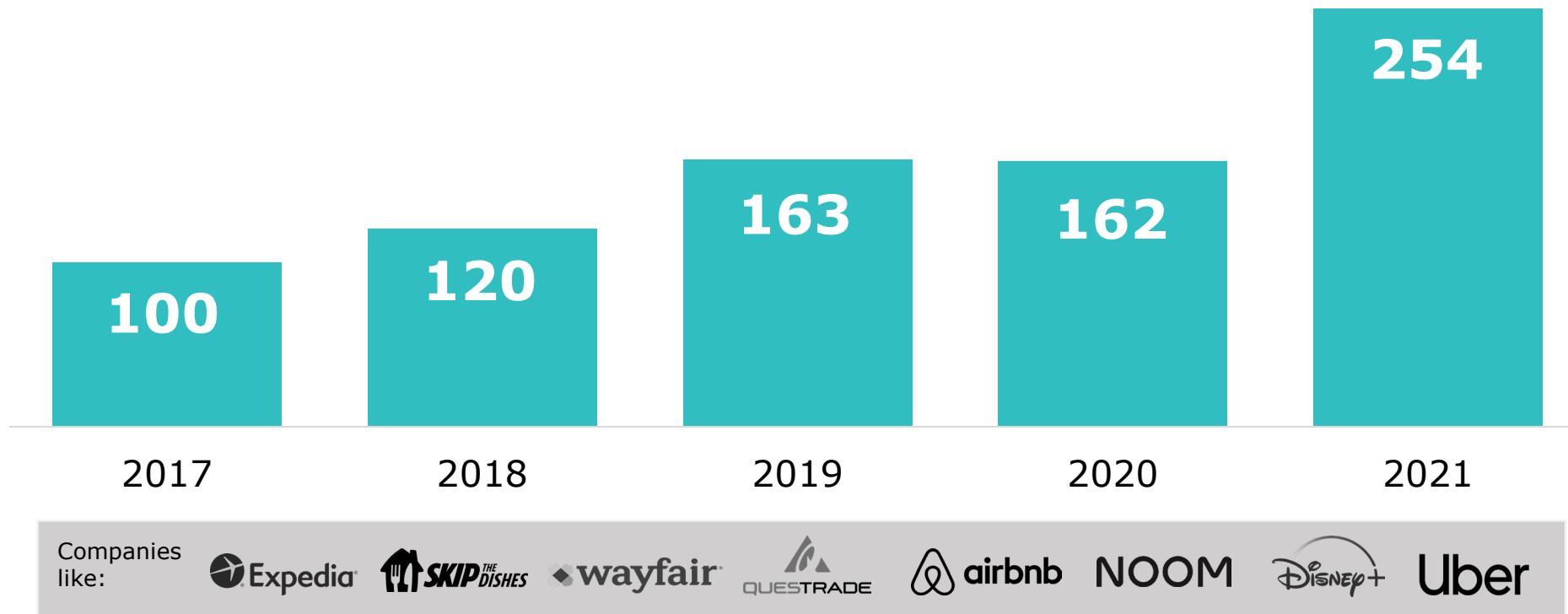
The adstock of a TV spot grows the fastest and lasts the longest



# digital companies know **thinktv** works!

TV spend by internet-related products & services\* is **up 2.5x** since 2017

## TV SPEND BY INTERNET BUSINESSES INDEXED TO 2017



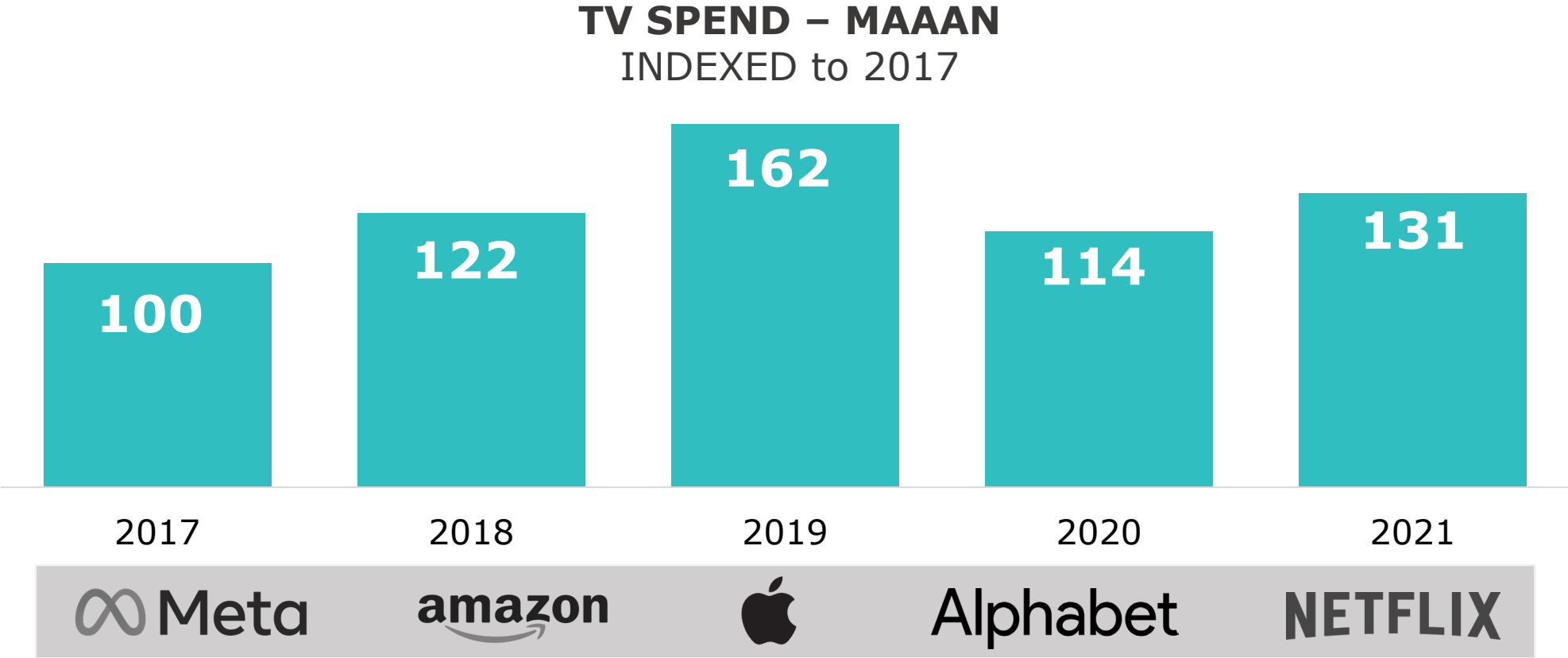
Total Canada/Annual/Numerator;

List of companies includes Numerator's "Internet-related sites and services" category plus additional online products and services. For full list of brands please contact thinktv.



# “MAAAN” continues to invest in

The pandemic negatively impacted MAAAN’s investment on TV, although spend is up 31% compared to 2017



# 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

# over 800 new products & services

launched television campaigns in 2021. TV continues to attract new advertisers looking to grow their businesses

allbirds

britbox



duolingo



plastk

Baycrest

BEYOND  
Van Gogh  
An Immersive Experience

NETCOINS

Lovehoney

ABSOLUT  
WATERMELON

Fanatics

purple

SUPER  
"DRY"  
Asahi  
JAPAN'S NO.1 BEER

breton

siggis

SONOS

WATERLOO  
BREWING

TWO OCEANS

SOUTH AFRICA

APPLETON ESTATE  
CRAFTED IN THE HEART OF JAMAICA

Vinted

Vrbo



DHL



think  
tv

# 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



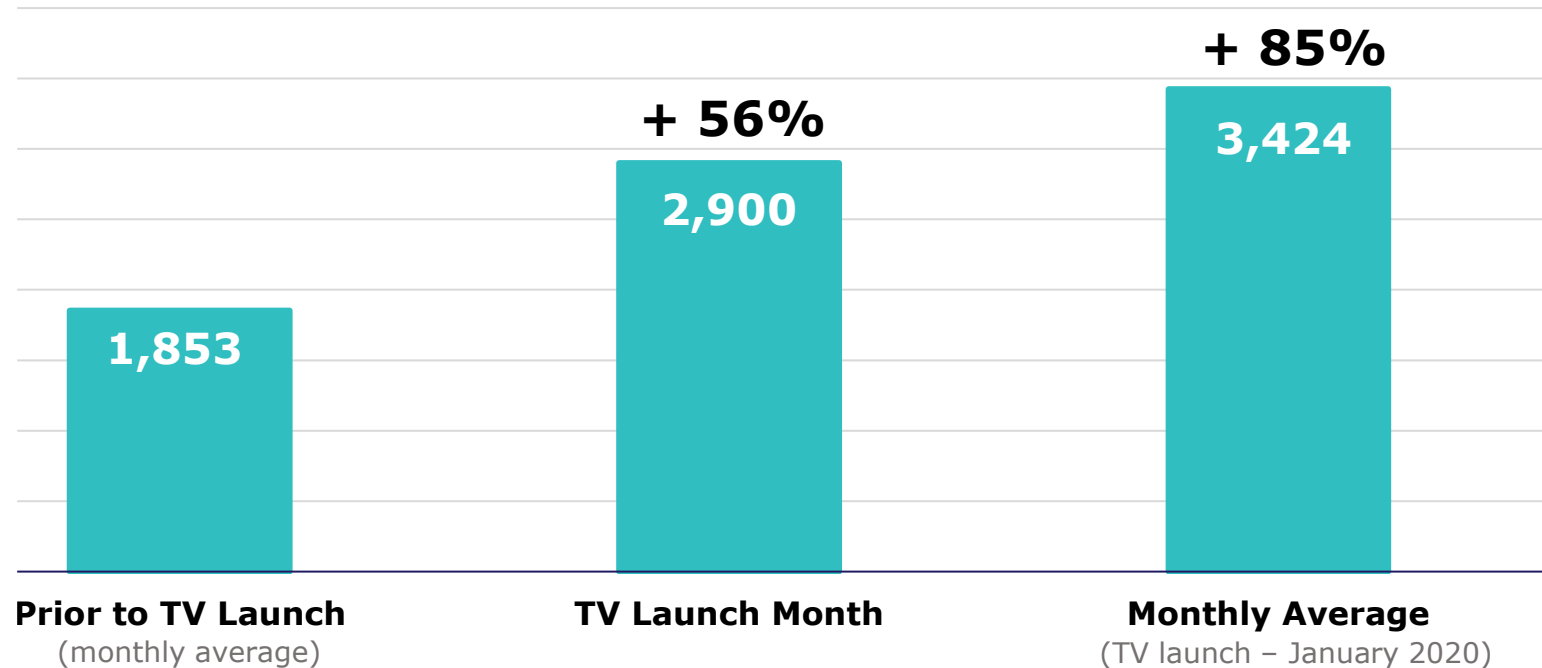
# tv drives the growth

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

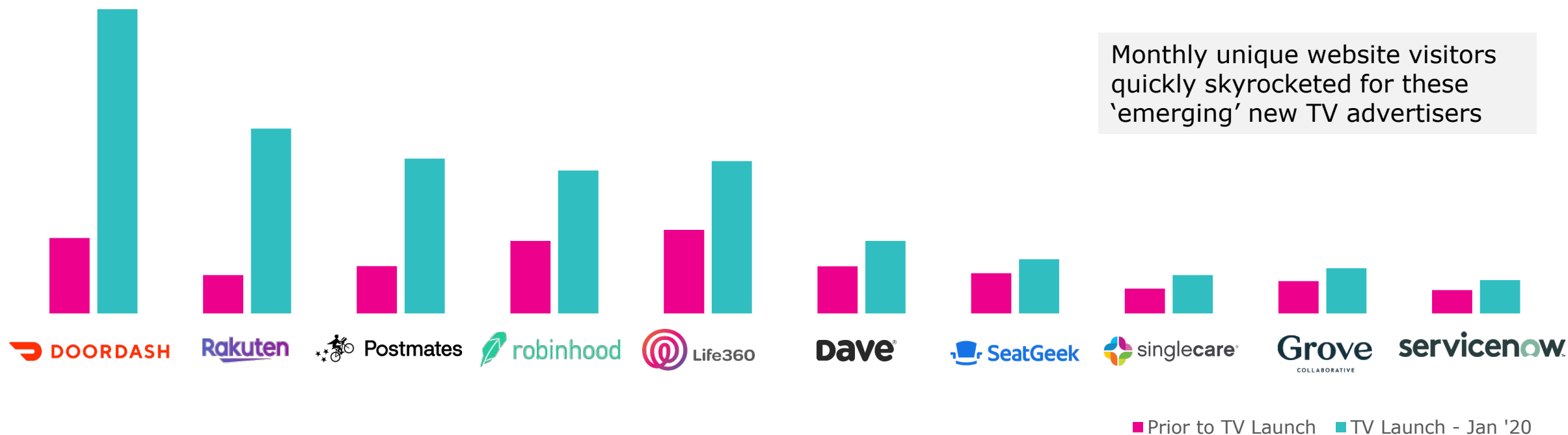
The VAB tracked 36 emerging DTC brands in the US and found **monthly unique visitors saw an immediate surge upon the launch of a TV campaign**, and this audience continued to grow through the duration of these brands' TV flight.



# 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.

# 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 AI



**Active  
Attention**

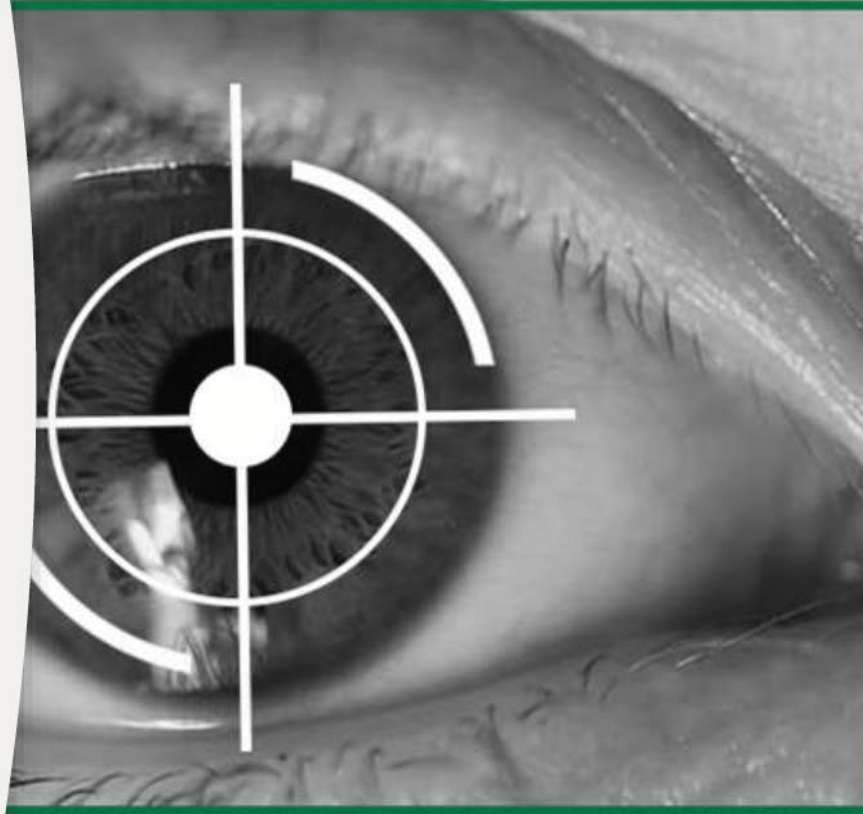


**Passive  
Attention**



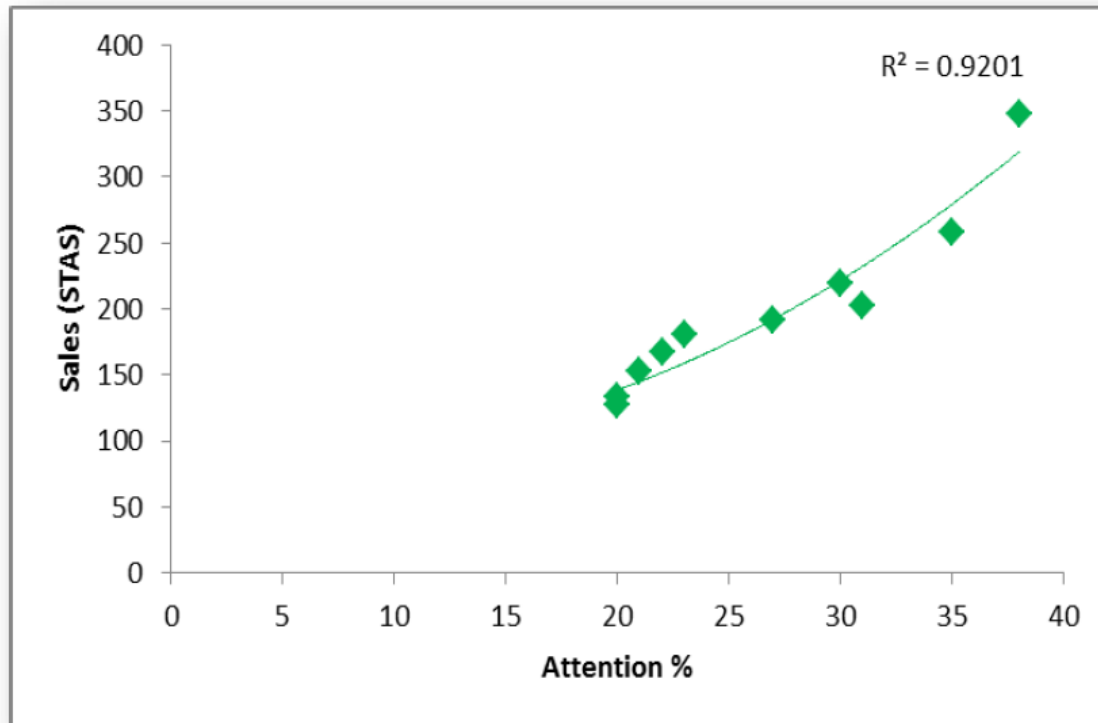
**Non-Attention**

Our gaze delivers an  
unparalleled measure of  
*continuous granular  
attention.*



x: 1044  
y: 0928

# Attention and Product Choice are Closely Related






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

THE  
**BENCHMARK** SERIES  
A NEW STANDARD IN MEASURING THE TRUE IMPACT OF ADVERTISING

think 

# 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

			
Active Avoidance	2%	2%	32%
Passive Watching	40%	94%	37%
Active Watching	58%	4%	31%

THE  
**BENCHMARK** SERIES  
A NEW STANDARD IN MEASURING THE TRUE IMPACT OF ADVERTISING

think 

# Screen Coverage explains the variations



**Coverage** – % Of Screen That The Ad Covers

think 

# 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.

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

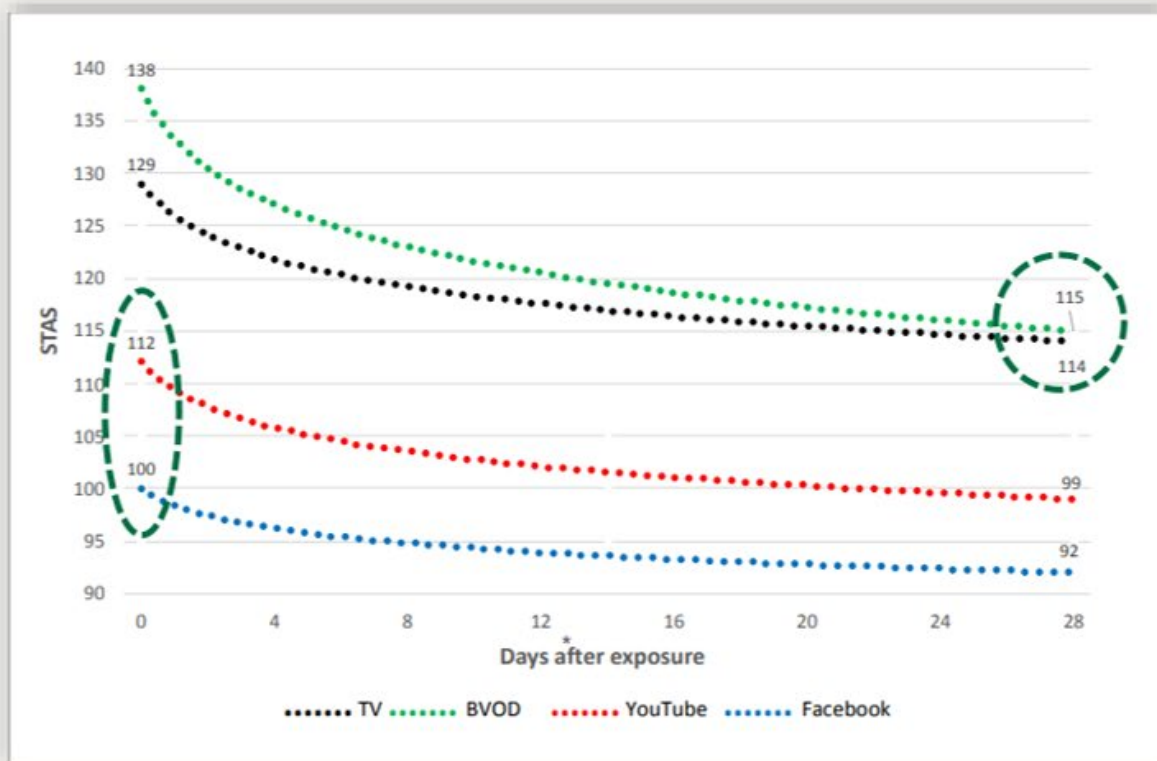
# TV delivers more sales uplift than any other platform.



	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

THE  
**BENCHMARK** SERIES  
A NEW STANDARD IN MEASURING THE TRUE IMPACT OF ADVERTISING

think 

# efficiency

**tv delivers the  
highest ROI**



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

October 2020



# PEAK PERFORMANCE

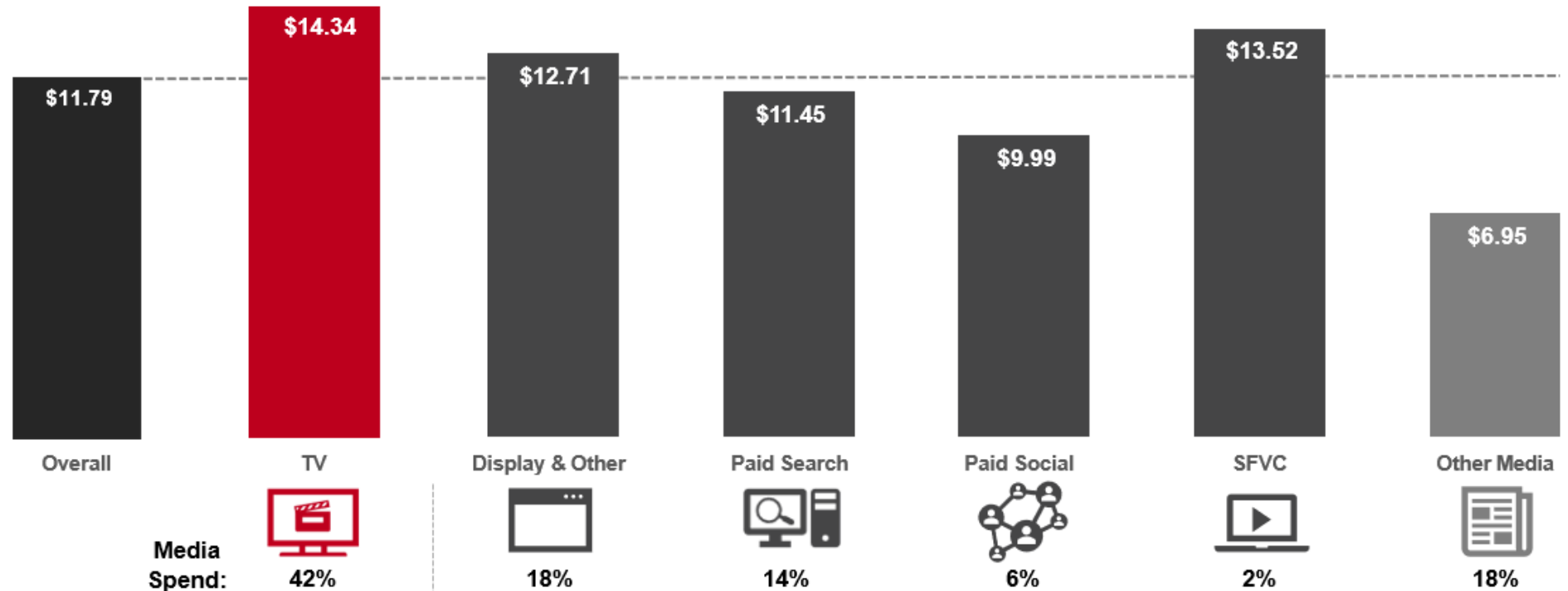
DRIVING ADVERTISING  
EFFECTIVENESS THAT LASTS

think<sup>tv</sup>

>  
accenture

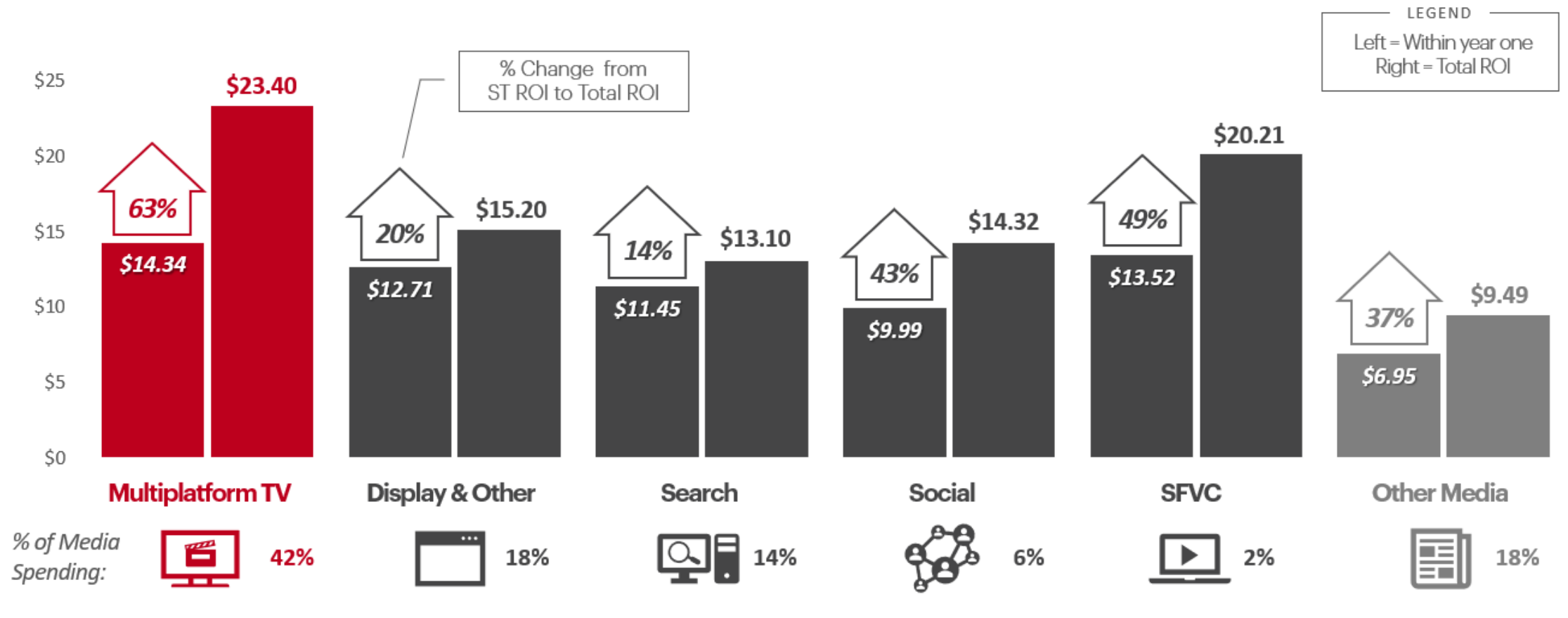
# TV HAS THE HIGHEST ROI OF ALL MEDIA

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



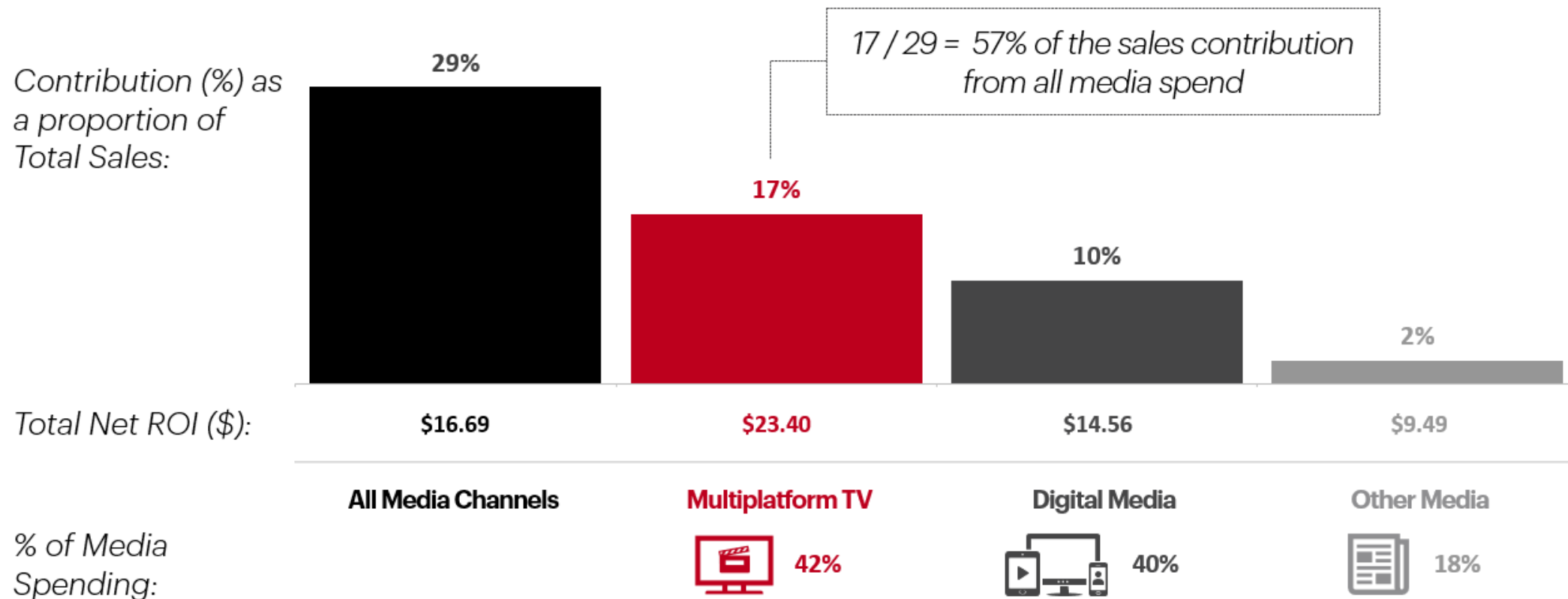
Source: [Peak Performance: Driving Advertising Effectiveness That Lasts](#)

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



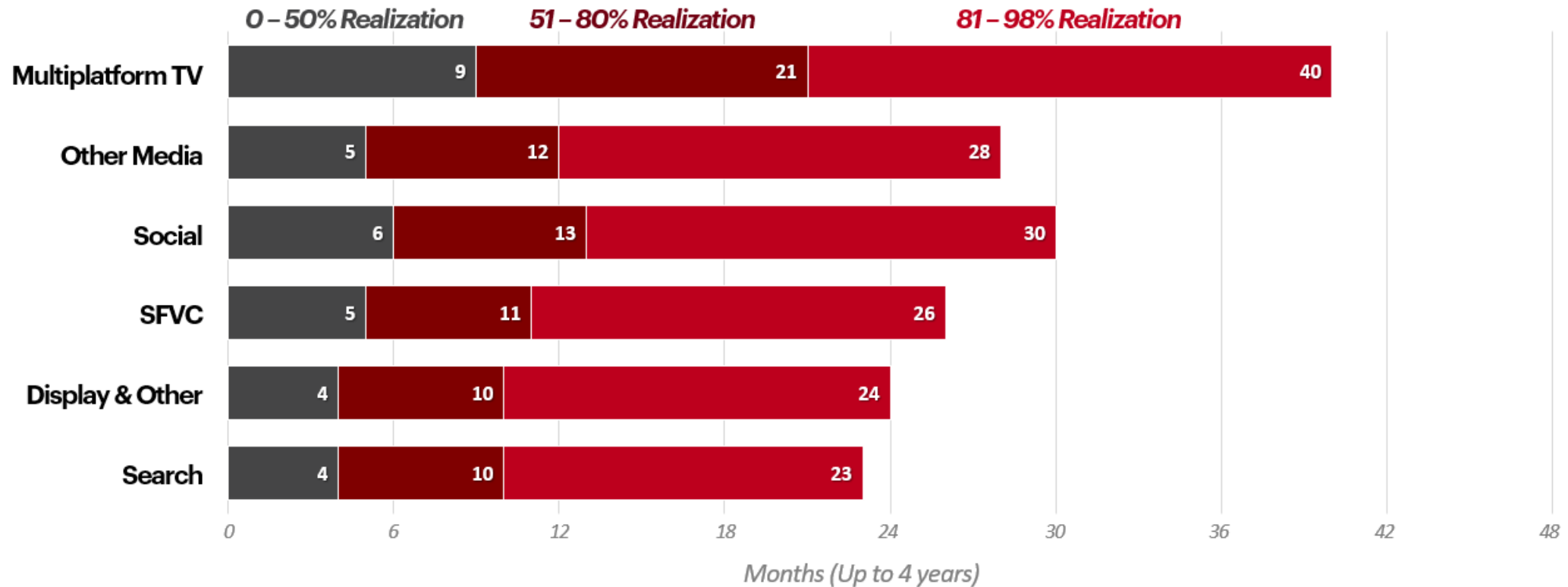
Source: [Canadian Media Attribution Study](#)

# 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](#)



Unilever



**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

# 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 »](#)

## 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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**subscribe to our  
newsletter**



**thinktv.ca**