the power of tv in an attention economy



tv reaches 32,150,779 Canadians every week

86% adults (18+) weekly reach 80% adults (25-54) weekly reach

ADDRESHE

79% adults (18-49) weekly reach **76%** adults (18-34) weekly reach

77% teens (12-17) weekly reach **74%** children (2-11)

weekly reach



Numeris PPM, Total Canada, Mo-Su 2a-2a, Sept 12 2022 to Dec 18 2022

707 million hours time spent with tv last week

85% Canadians 2+ tv's weekly reach



Canada | Numeris PPM, Mo-Su 2a – 2a, Sep 12-Dec 18 2022

the average tv campaign delivers

TV campaign based on a 900 GRP campaign (6 weeks x 150 GRPs) | Canada | Numeris PPM Sep 12-Dec 18 2022, Ind. 2+

342 million impressions



tv is powerful because it delivers:

reach

demand

efficiency

impact



reach

32.2 Million Canadians each week

thin

Canada Numeris PPM, Mo-Su 2a – 2a, Sep 12-Dec 18 2022, Ind. 2+



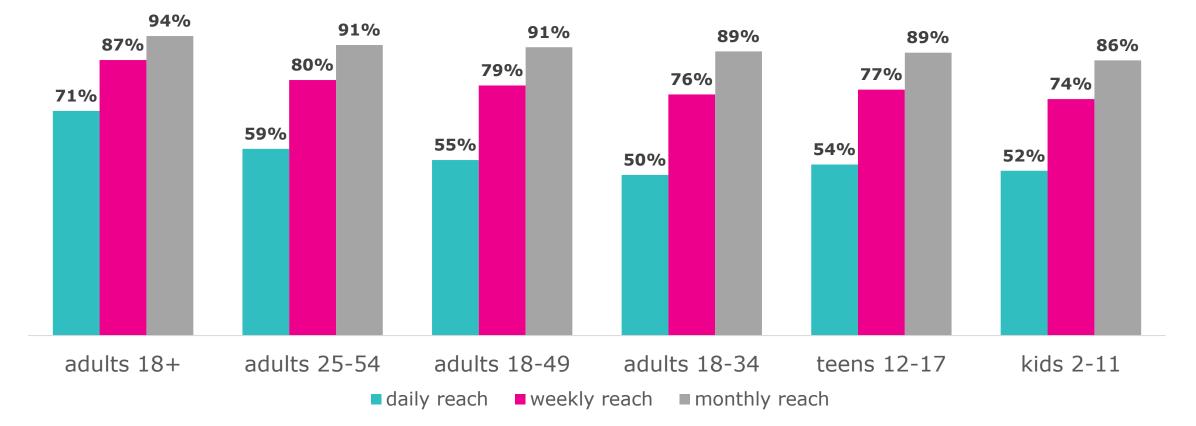
Marketing activities only build mental availability in the audience they reach.

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

think

Byron Sharp Professor of Marketing Science, University of South Australia

tv reaches 94% of Canadians (18+) every month

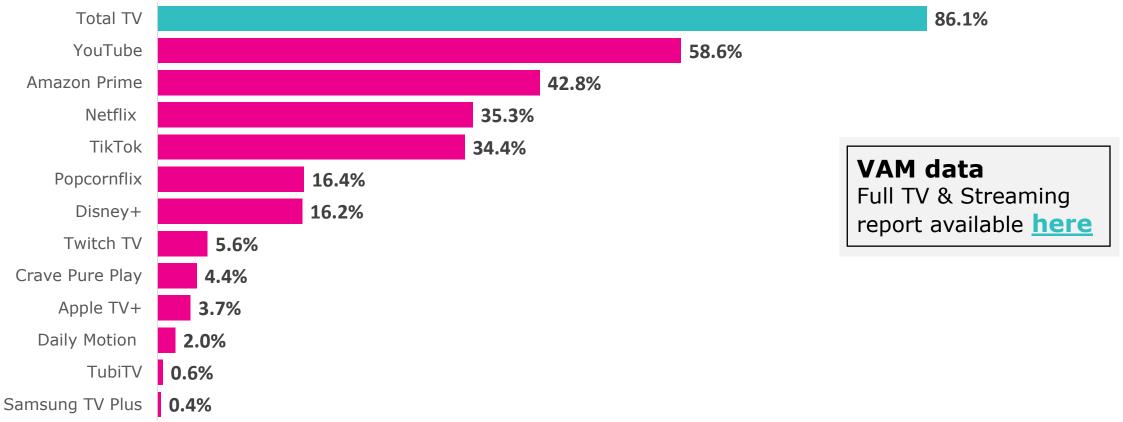




tv 's reach far exceeds all streaming services

ADULTS 18+





Total TV defined as linear TV and broadcaster streaming services Streaming Services include in-home viewing only Source: Numeris VAM, Sept-Nov 2022

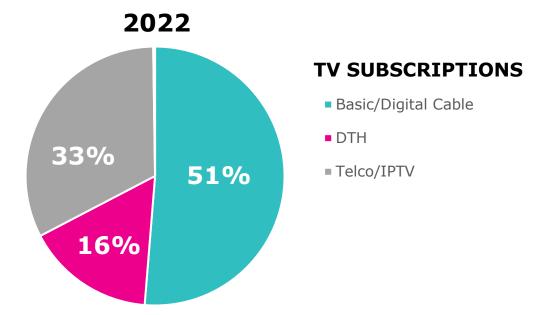


10.2 million paid tv subscriptions

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
Total Paid Subs	10,370,353	10,201,983	98
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

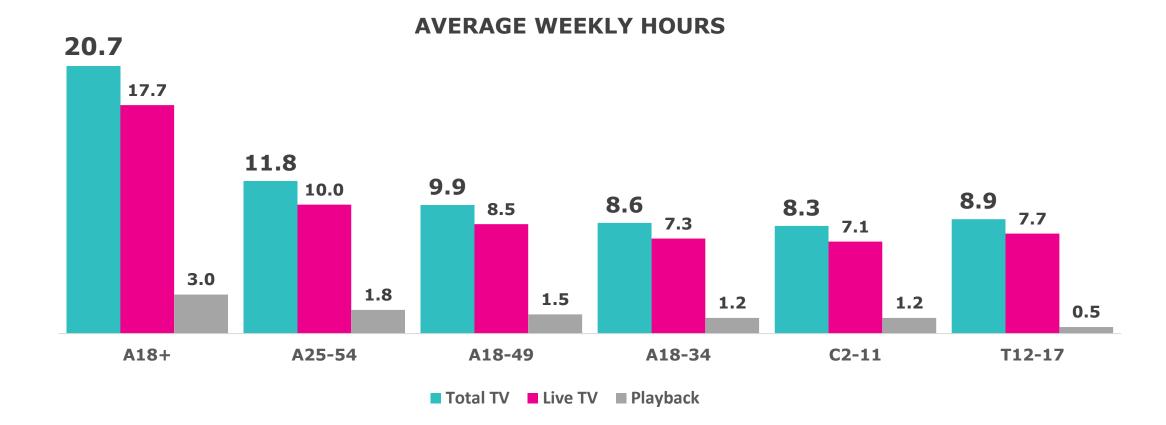




Mediastats, Total Canada, June 2021, June 2022, BDU Profile Report | * Numeris PPM Sept 12 – Dec 18 2022



and most of it is live

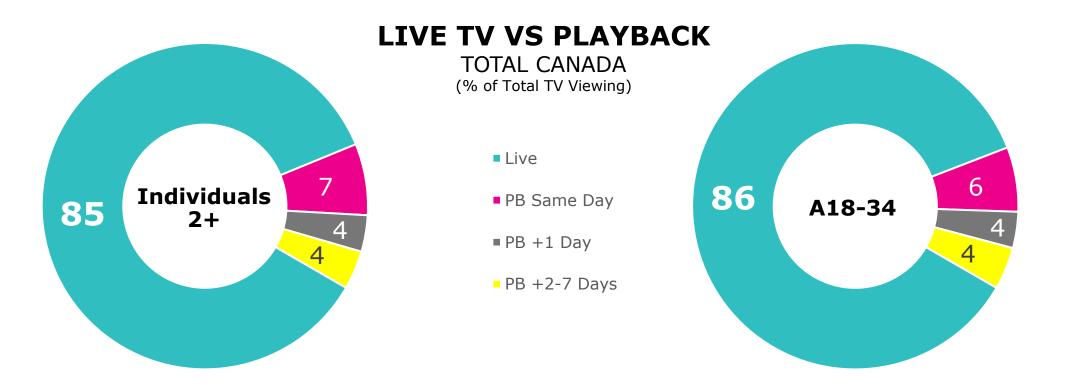


TV = viewing to any live broadcaster content (streamed on any platform and linear TV) plus any broadcaster content recorded on PVR (with commercial load intact) that is viewed within 7 days of initial broadcast. Does not include on demand streaming.

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

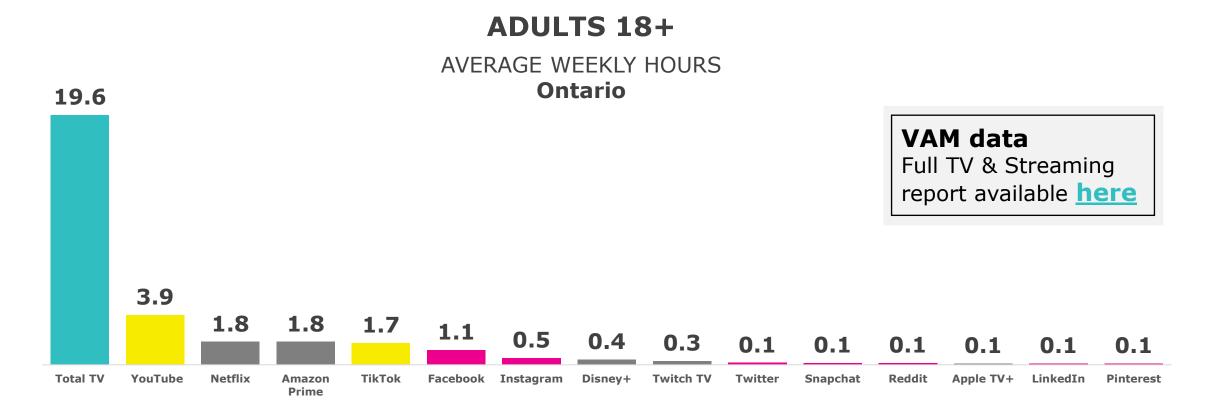


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Canada | Numeris PPM, Total Hours(000) Sep 12-Dec 18 2022 | PB = Playback



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



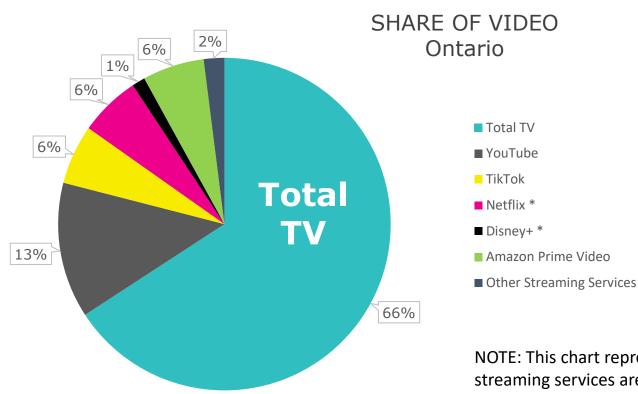
All time spent per capita

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)

\mathbf{tv} should form the base of every video plan



ADULTS 18+

VAM data Full TV & Streaming report available <u>here</u>

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





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

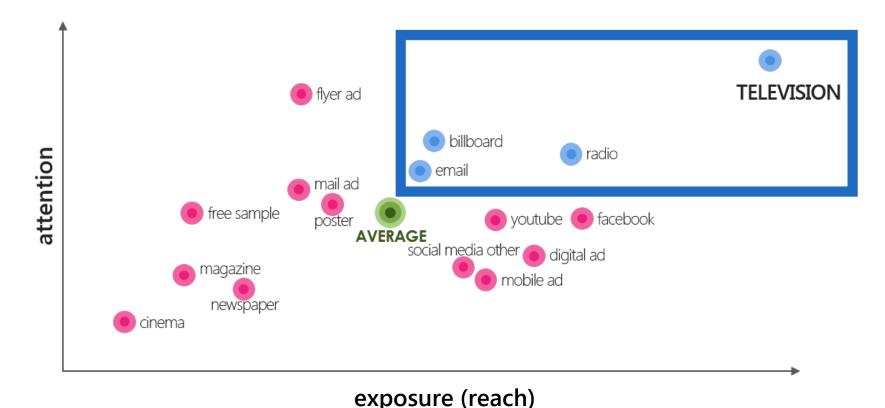
Leo Burnett





when it comes to exposure & attention

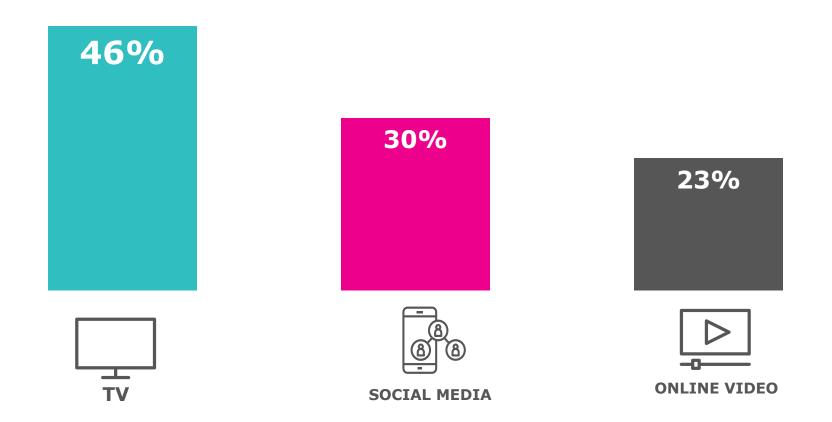
Each medium delivers some combination of reach (exposure) and consumer attention. TV delivers the **highest exposure** through its mass reach AND it captures the **greatest consumer attention**.







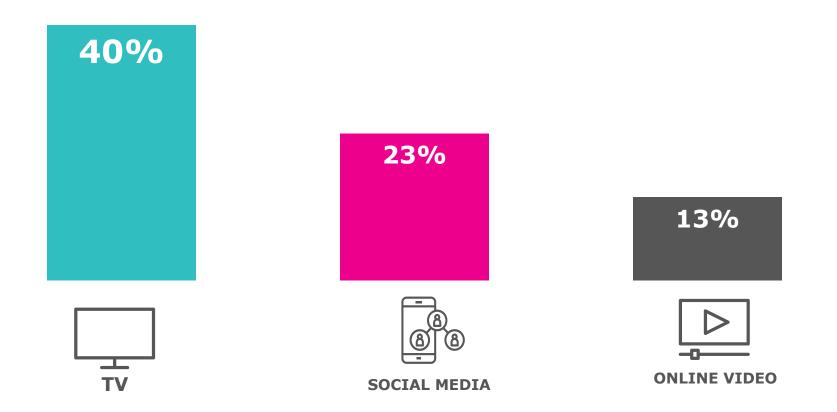
tv ads get the most attention



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



tv ads are the most memorable

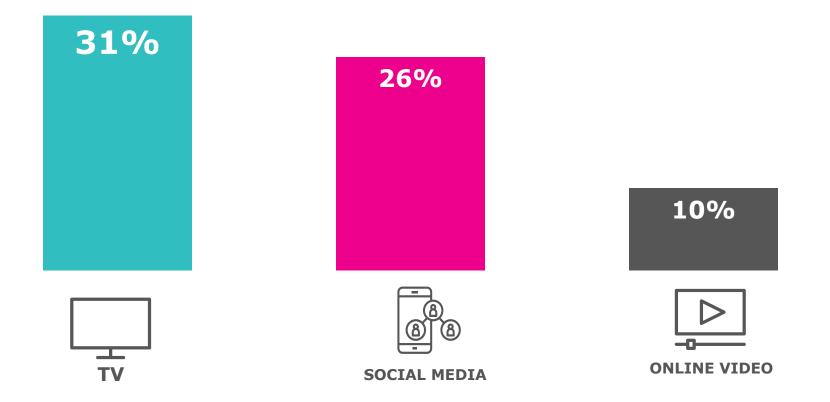


Q: Which ONE of the following media carries advertising that you are most **LIKELY TO REMEMBER**? not listed are: "Other" @ 25%; includes newspaper, radio, search & OOH.



YouGov BrandIndex Tracking, Total Canada, A18+, July 2022

tv is most likely to drive purchases

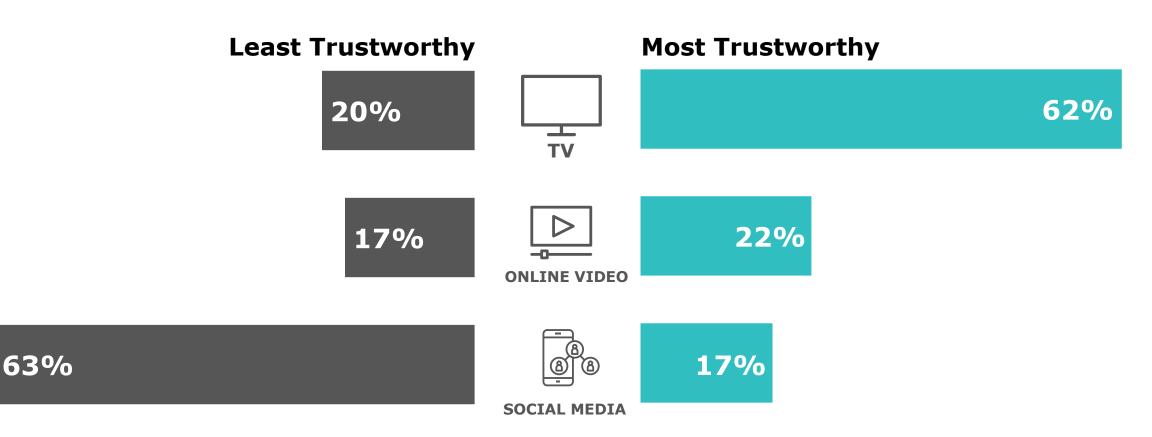


Q: Which ONE of the following media carries advertising that is most likely to make you **WANT TO BUY** the product? not listed are: "Other" @ 33%; includes newspaper, radio, search & OOH.



tv is the most trusted medium

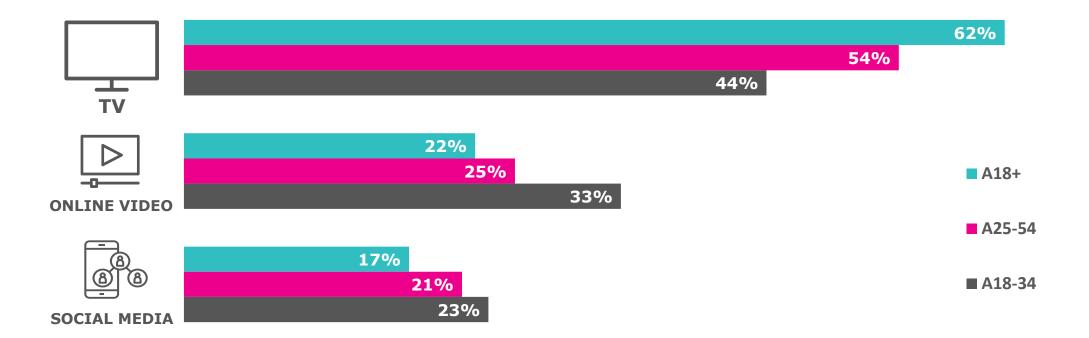
(while social media is the least trusted)



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)

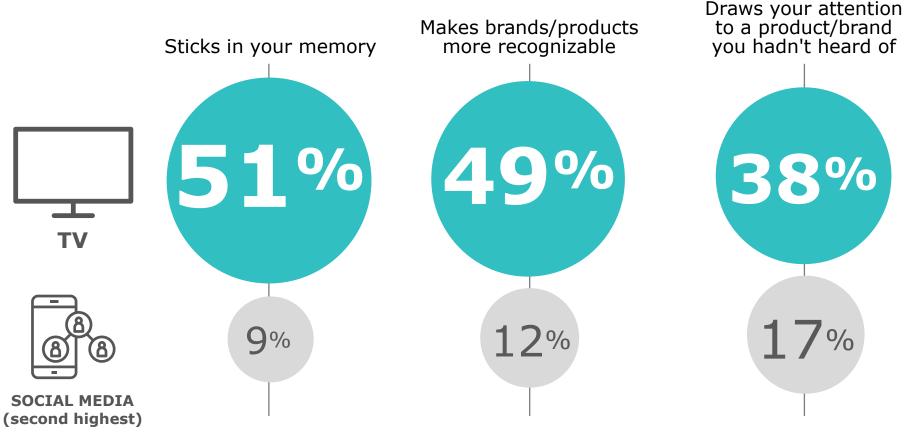


Q: Which ONE of the following media carries video advertising you believe to be most TRUSTWORTHY?



tv advertising has significant impact

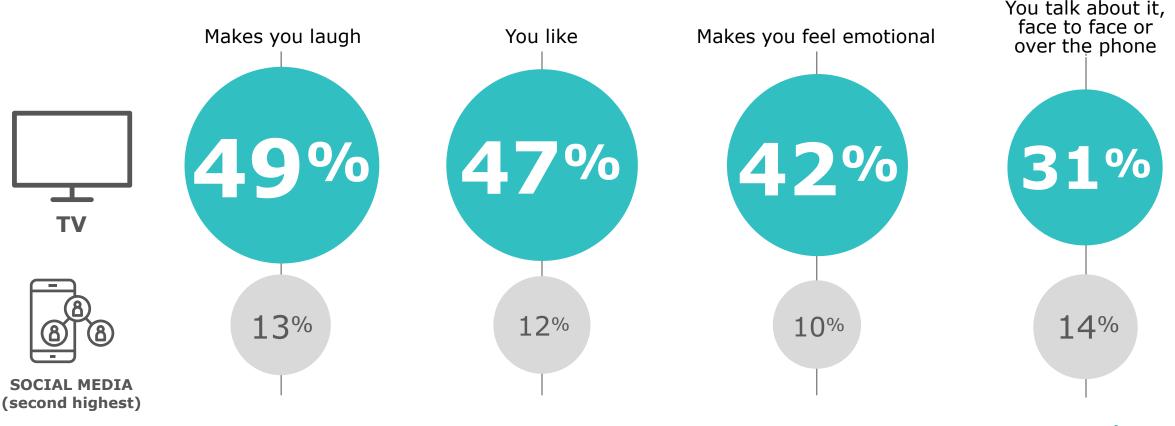
In which of the following media are you most likely to find advertising that...?





tv advertising is the most likely to generate emotion and conversation

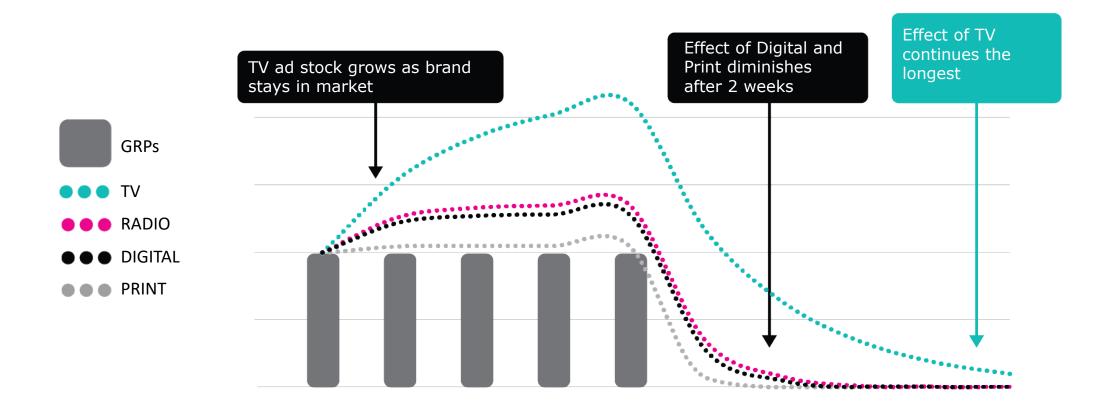
In which of the following media are you most likely to find advertising that...?





tv ads deliver the biggest impact

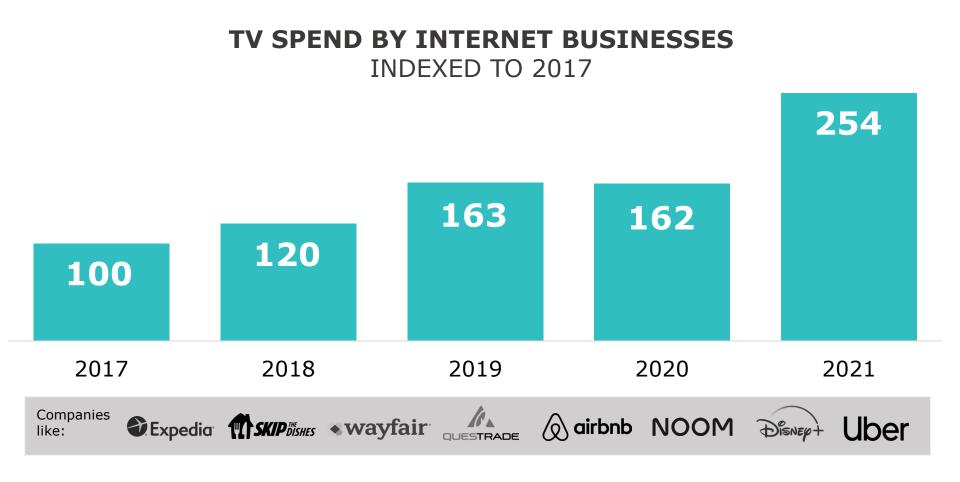
The adstock of a TV spot grows the fastest and lasts the longest





digital companies know tv works!

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

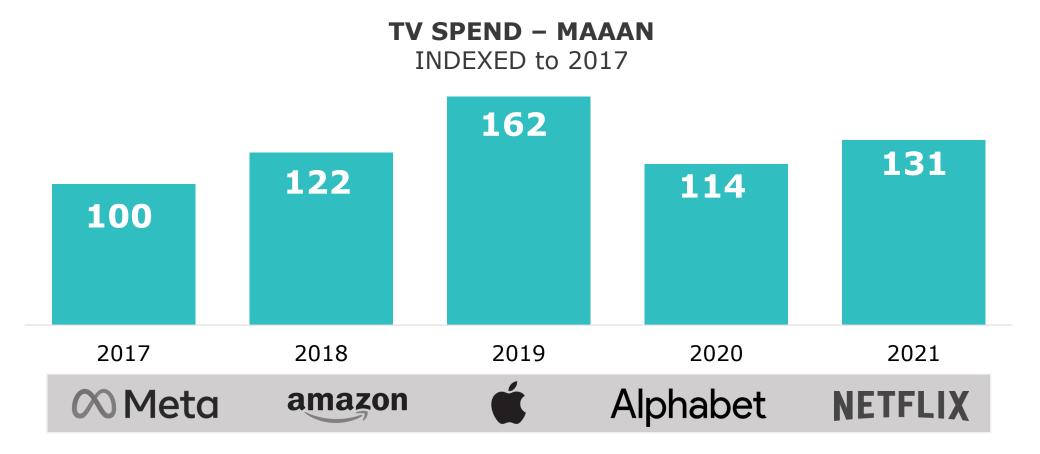


Total Canada/Annual/Numerator;

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 tv

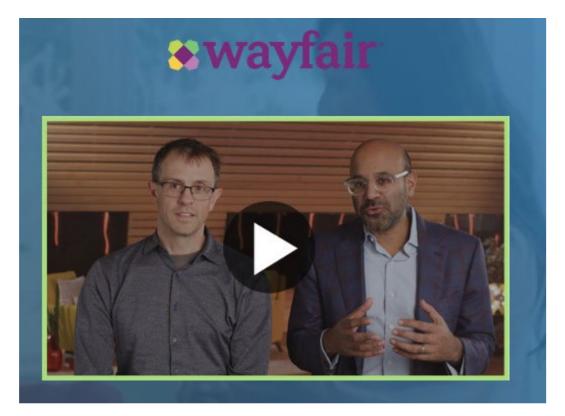
The pandemic negatively impacted MAAAN's investment on TV, although spend is up 31% compared to 2017





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



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





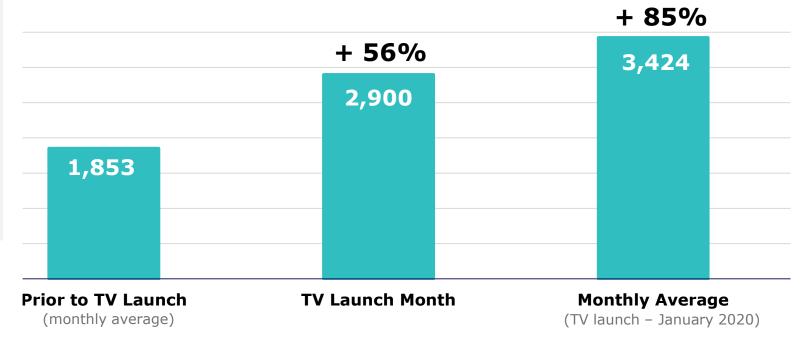
tv drives the growth

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.





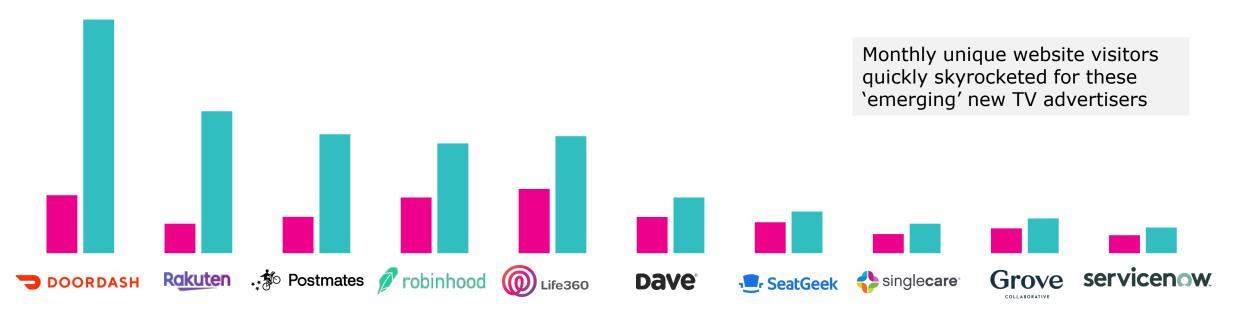
VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Feb '18 – Jan '20 (calendar months). VAB analysis of Comscore mediametrix multiplatform media trend data, total audience (Desktop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



Prior to TV Launch TV Launch - Jan '20



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

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





tv delivers more sales uplift than any other platform

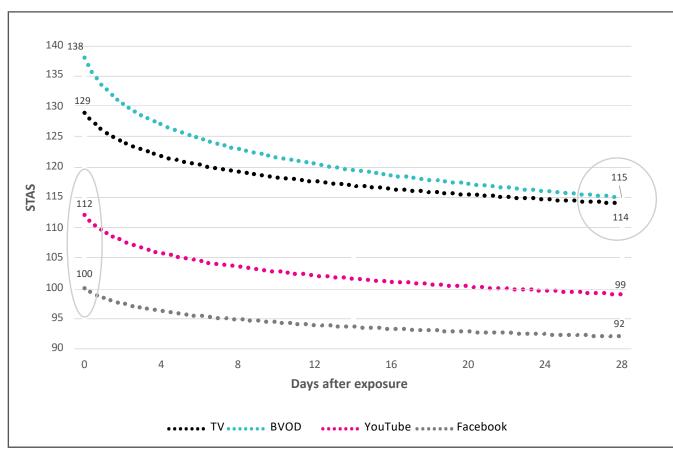
	STAS Index
BVOD (MOBILE)	138
TV ON TV	129
YOUTUBE	112
INSTAGRAM	105
FACEBOOK	100

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

STAS = Short Term Advertising Strength



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

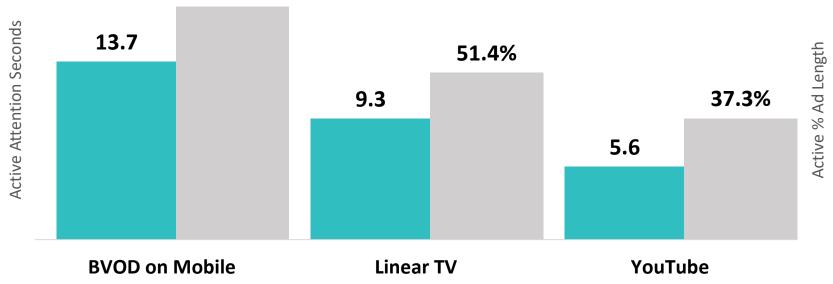


TV ad retention generates a greater impact at 28 days than either Facebook or YouTube do **immediately after exposure.**

*BVOD Modelled

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

Active Attention by Platform

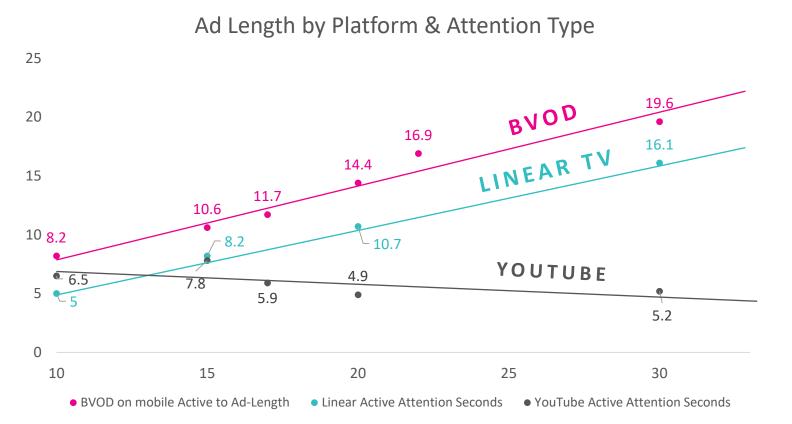


71.7%

Active Attention Active % Ad Length



longer ads on we 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**



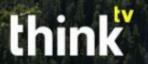
efficiency

tv delivers the highest ROI

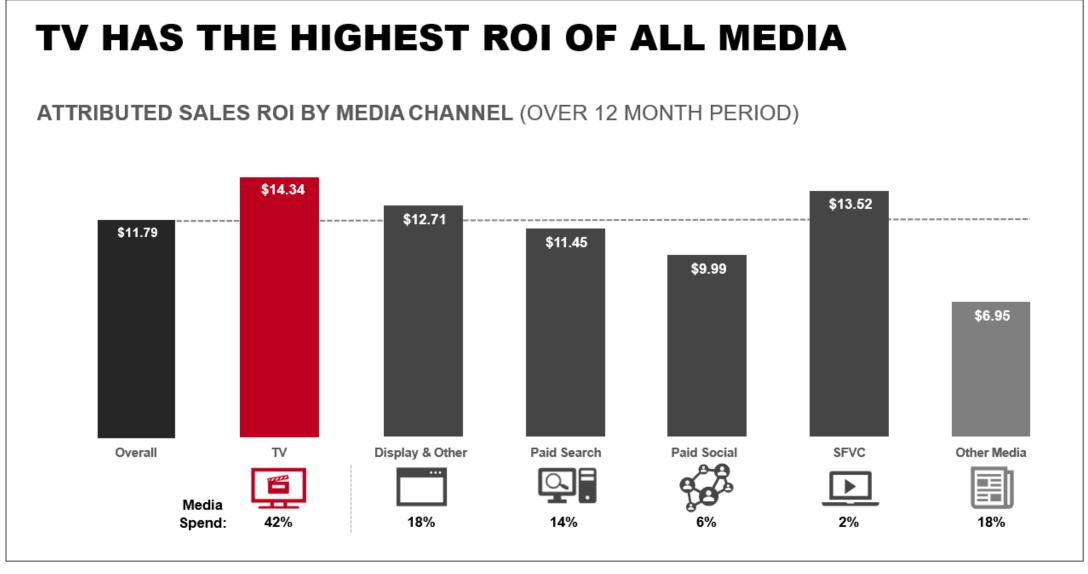


October 2020

PEAK PERFORMANCE DRIVING ADVERTISING EFFECTIVENESS THAT LASTS



accenture

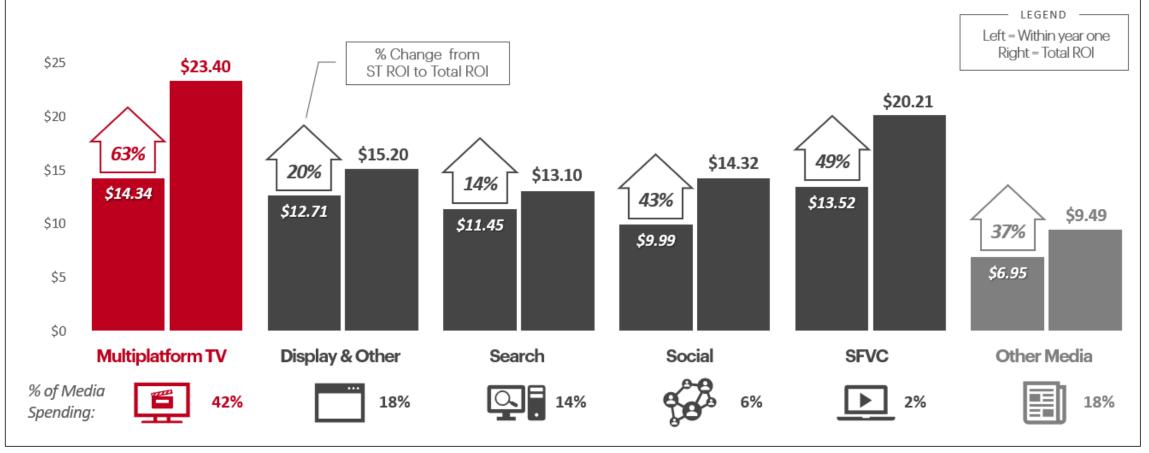


Source: Canadian Media Attribution Study





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



Source: Peak Performance: Driving Advertising Effectiveness That Lasts



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



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



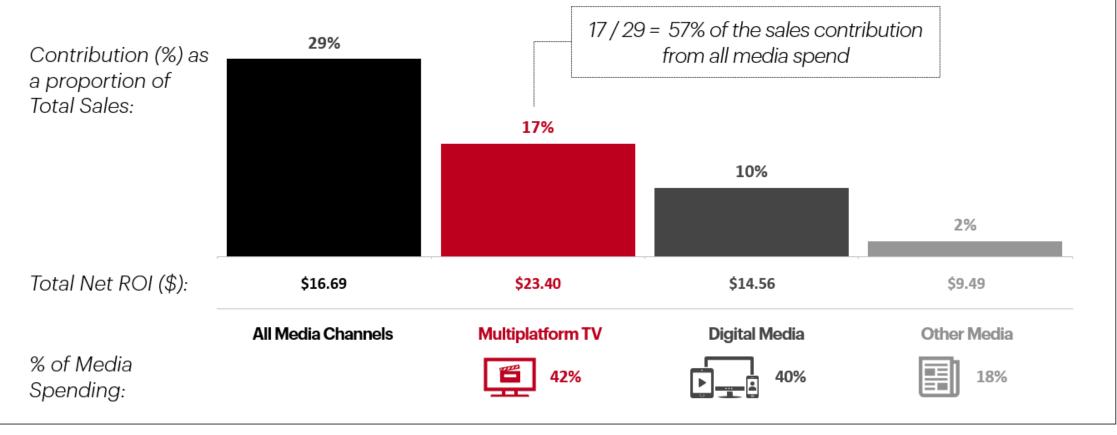
Source: Canadian Media Attribution Study





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

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

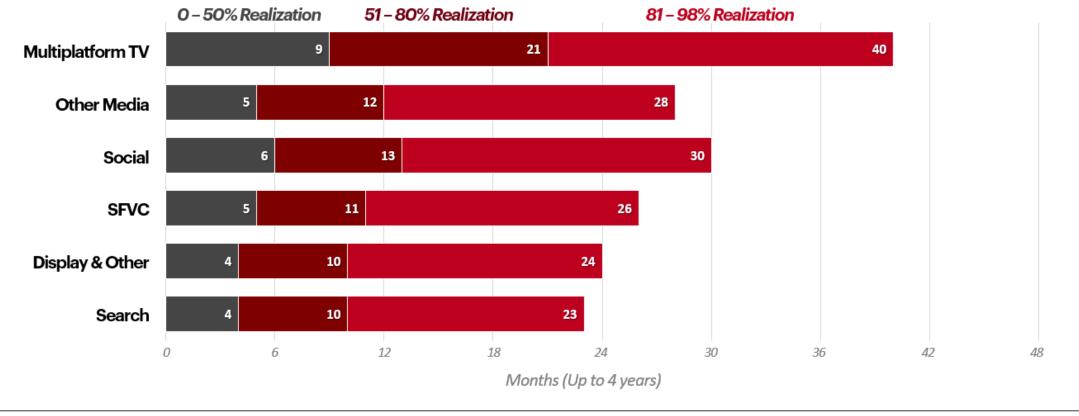


Source: Peak Performance: Driving Advertising Effectiveness That Lasts





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



summary







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 longterm 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 »



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