

A blurred background image of a family sitting on a couch. In the foreground, a hand holds a black remote control. A glass bowl of popcorn is also visible.

the power of



in an attention economy

tv reaches
26,014,000
Canadians every day

87%

adults (18+)

weekly reach

76%

adults (18-34)

weekly reach

77%

kids (2-11)

weekly reach

thinktv

108

**million
hours**

**time spent
with tv yesterday**

85%

Canadians

2+

**tv's weekly
reach**



the average **tv** campaign delivers

337
million
impressions

think^{tv}

tv is powerful because it **delivers:**

reach

impact

demand

efficiency

think^{tv}

reach

32.0 Million Canadians
each week



think^{tv}

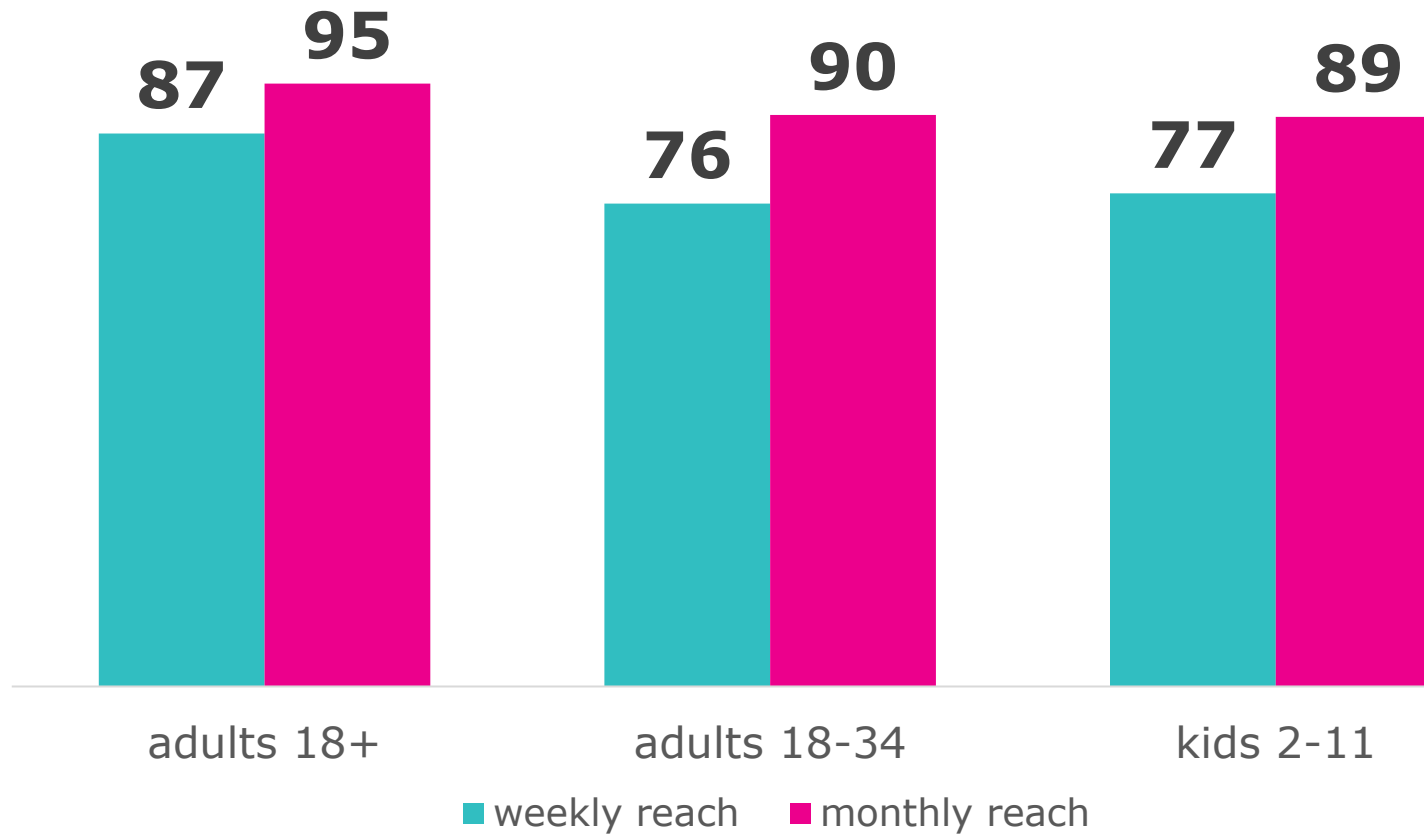


**Marketing activities only
build mental availability in
the audience they reach.**

**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

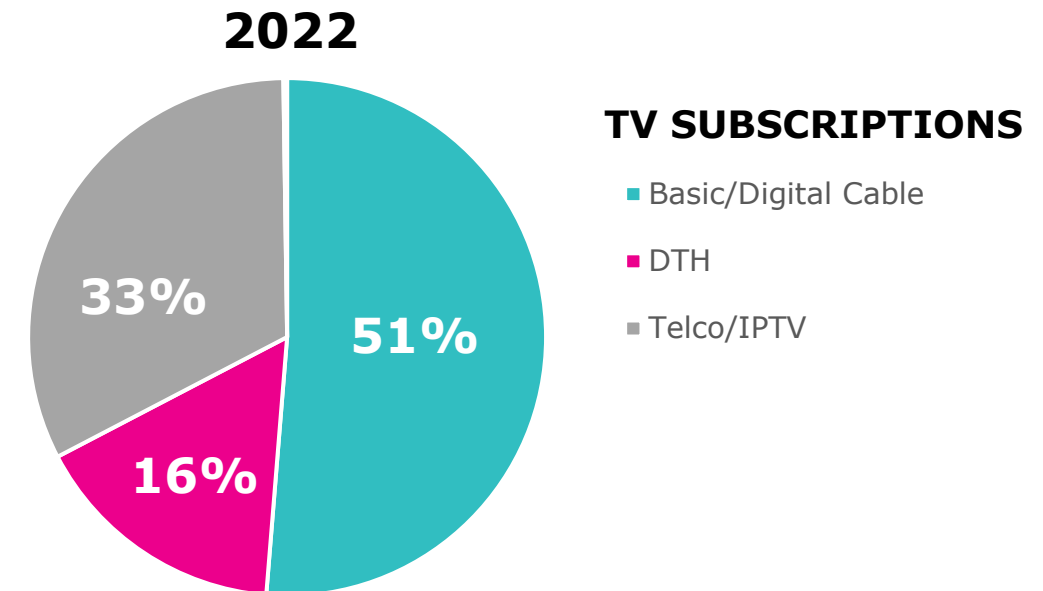


10.3 million paid subscriptions

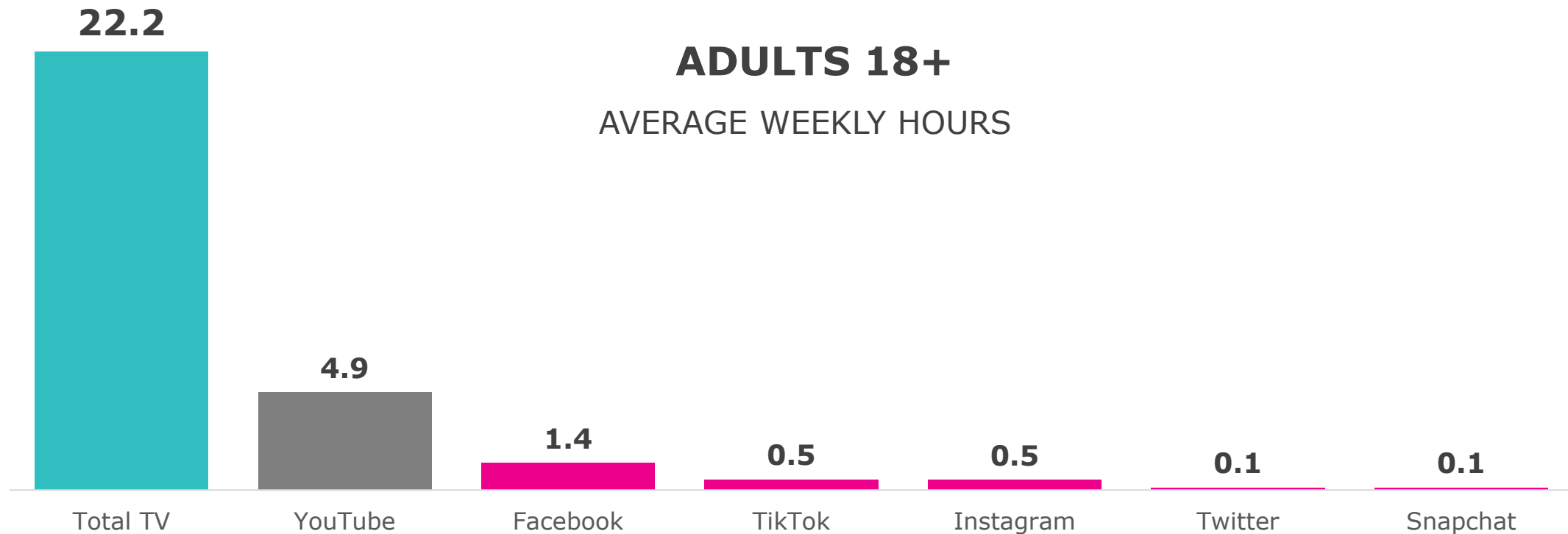
Cord cutting has been far overstated: total subs down only 1%.

The notion that “no millennials subscribe to TV” is also false: **68% 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 76% of A18-34 on a weekly basis).

	Jan '21	Jan '22	Index
Total Paid Subs	10,483,436	10,341,772	99
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

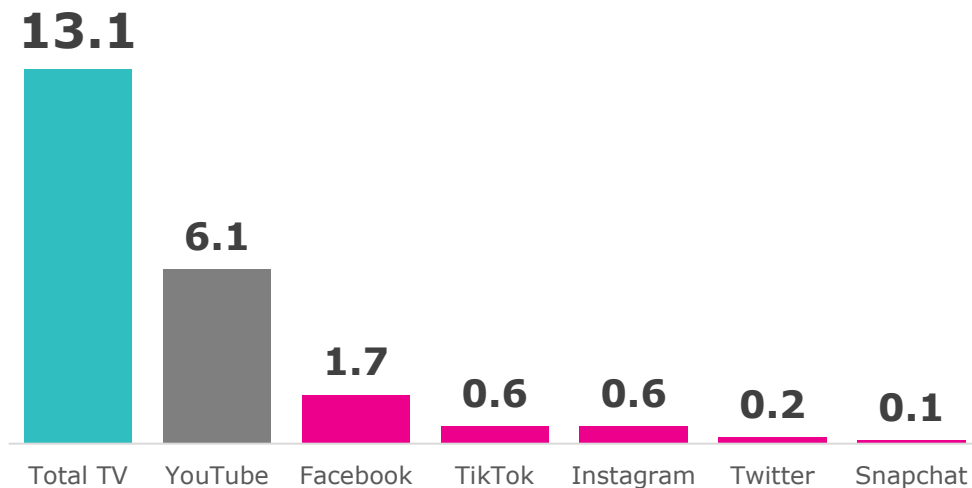


Total TV = viewing to broadcaster linear TV plus any broadcaster content that is live streamed on other platforms with the linear commercial load intact. Does not include streaming to OTT services.

Canadians watch a lot of

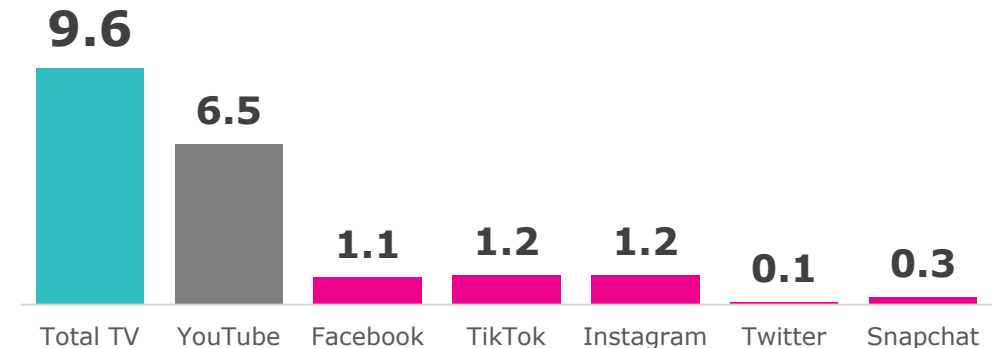
ADULTS 25-54

AVERAGE WEEKLY HOURS



ADULTS 18-34

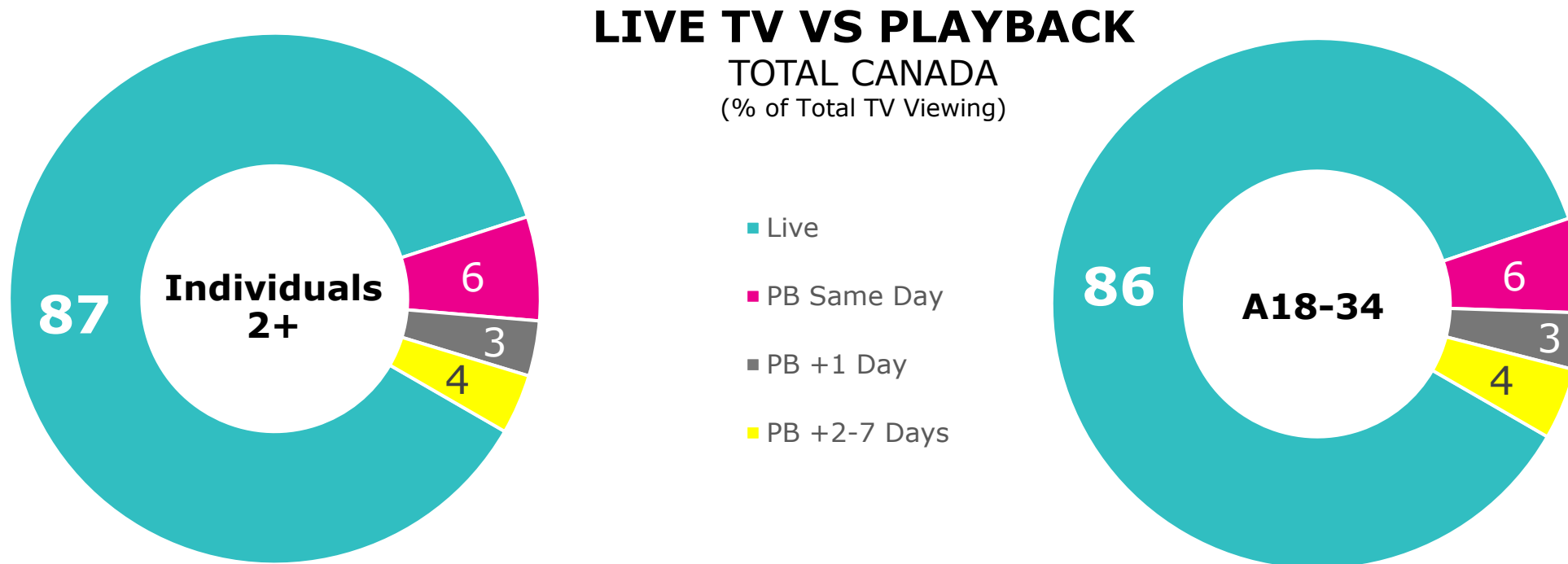
AVERAGE WEEKLY HOURS



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.

87% 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 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.



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

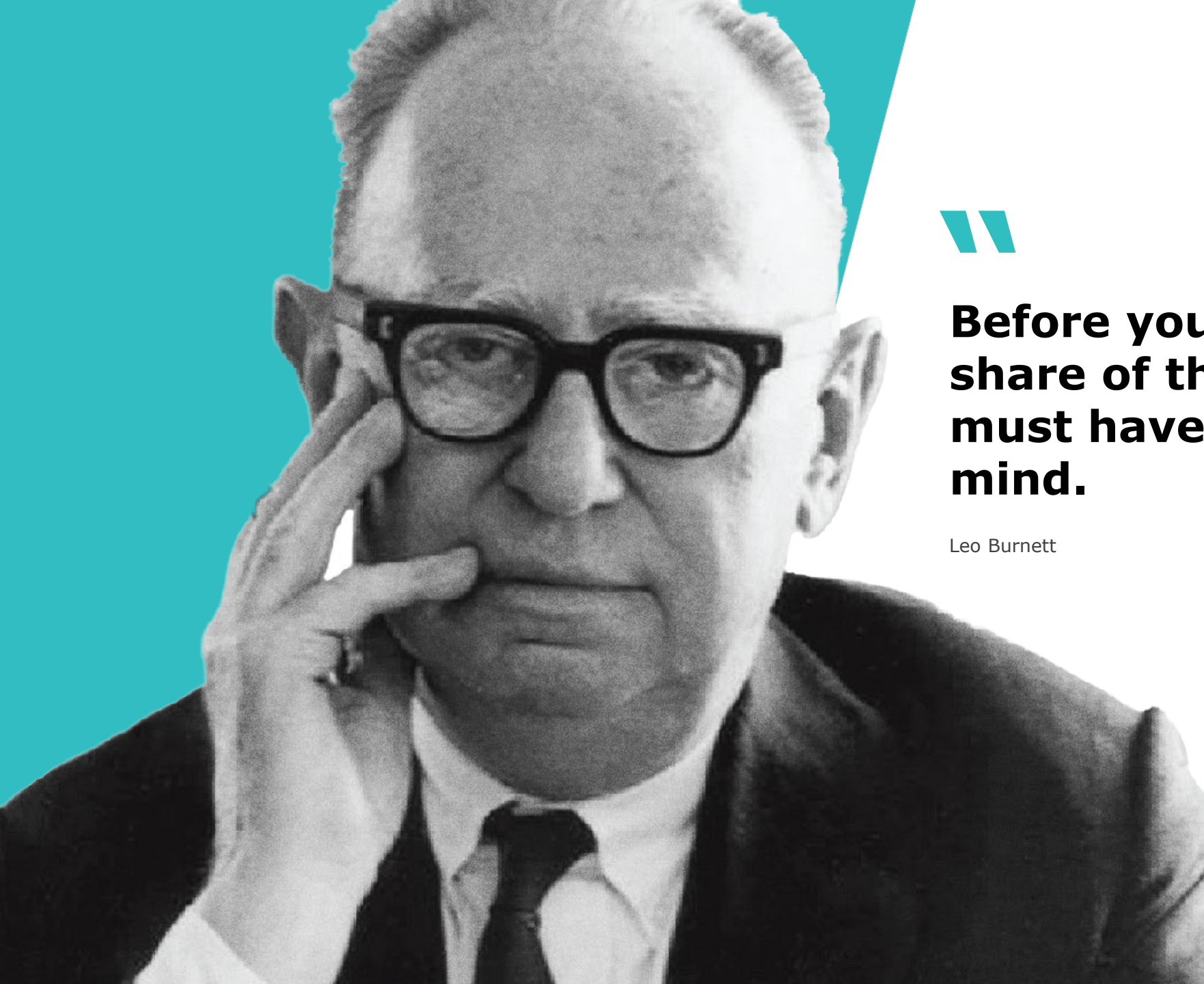
Mark Ritson
Marketing & Branding Expert, Columnist, Consultant and Professor

impact

**tv ads are the
most influential**



think^{tv}



“

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

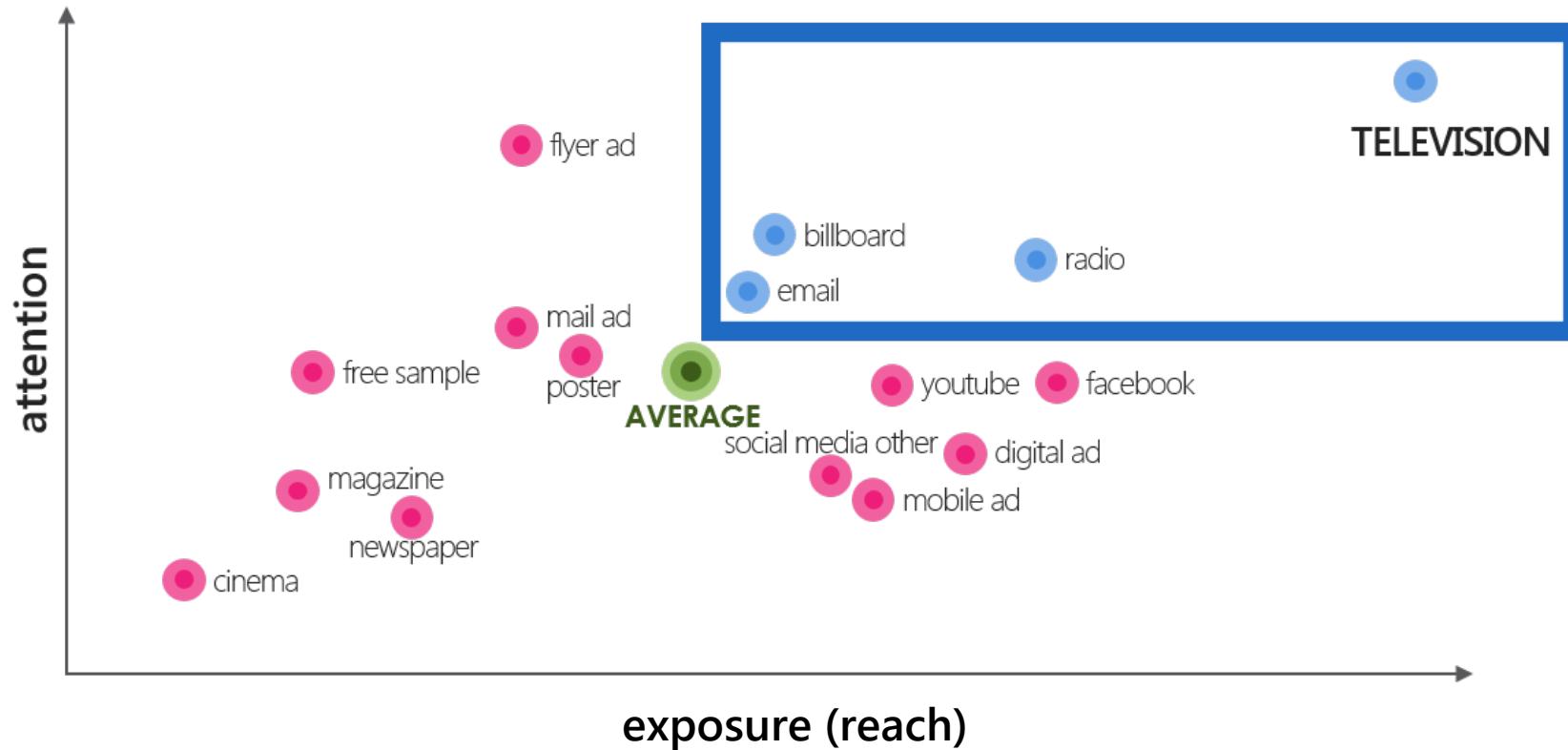
Leo Burnett

tv is king

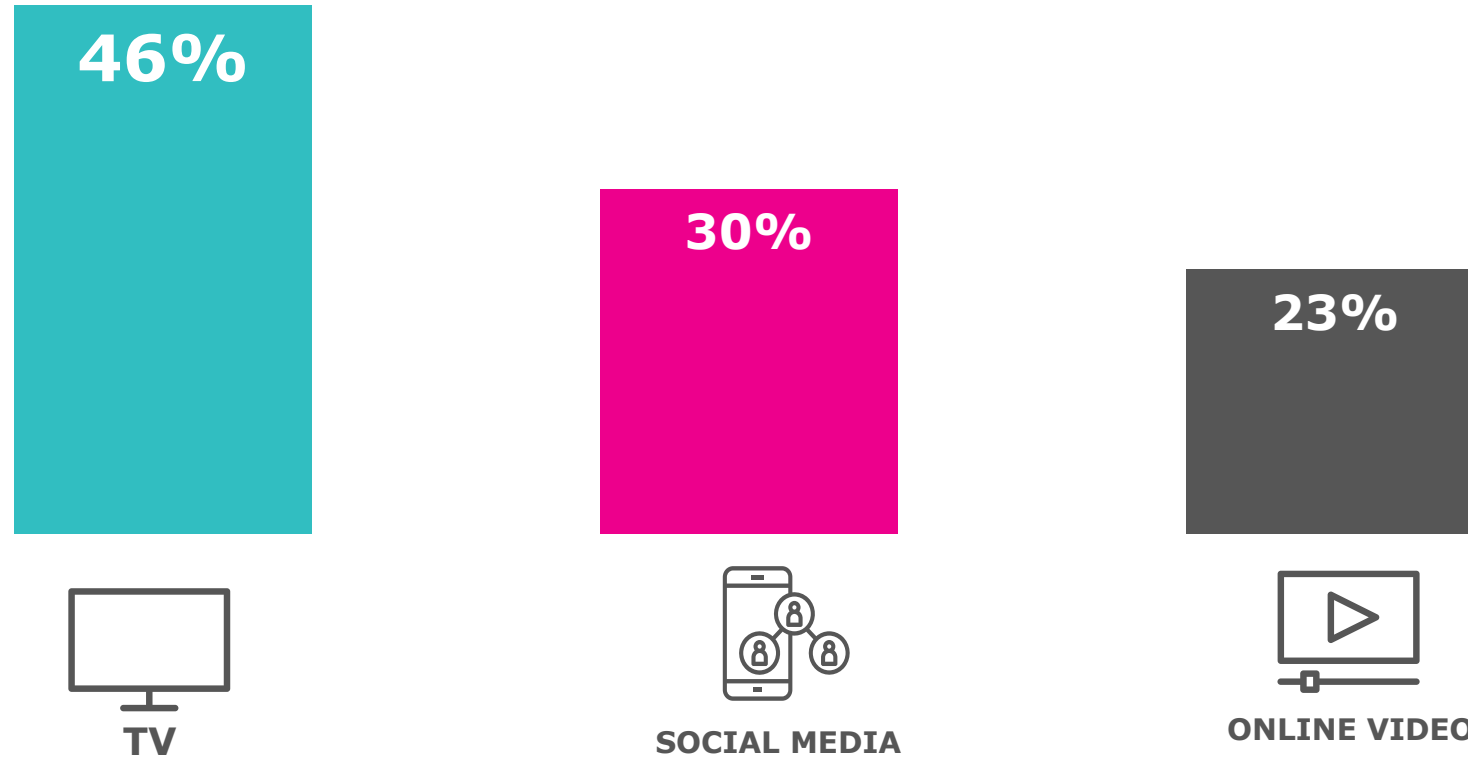
when it comes to exposure & attention

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**.

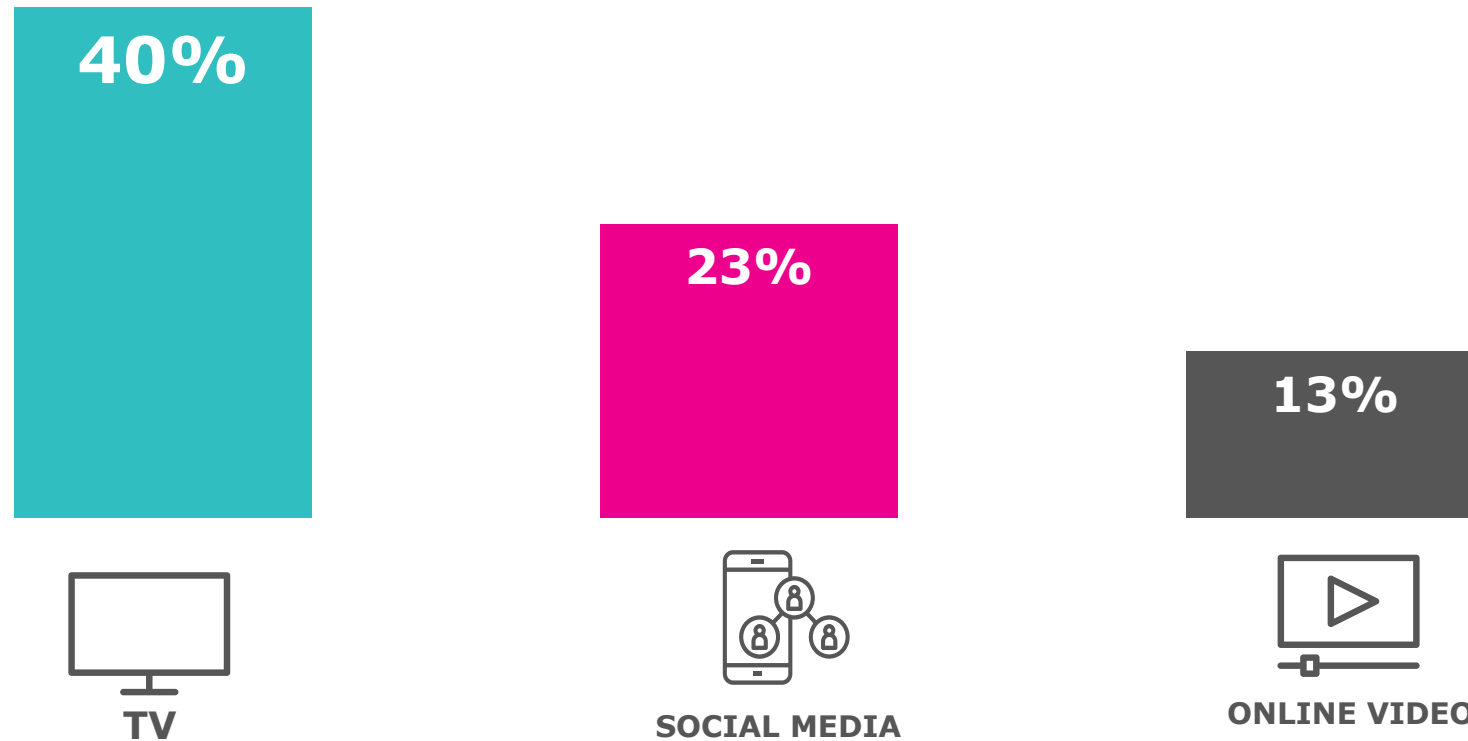


tv ads get the most attention



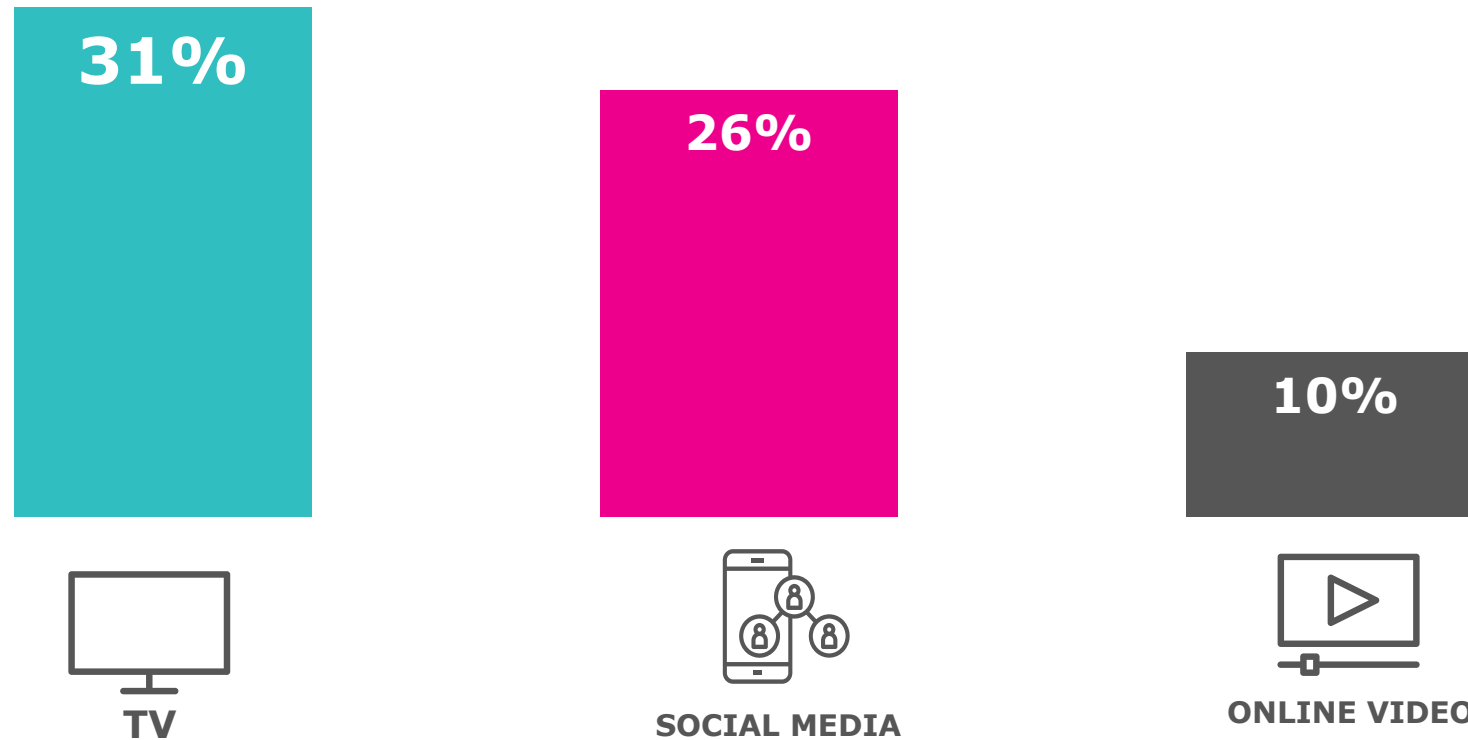
Q: Which ONE of the following media carries video advertising that best **captures your ATTENTION?**

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.

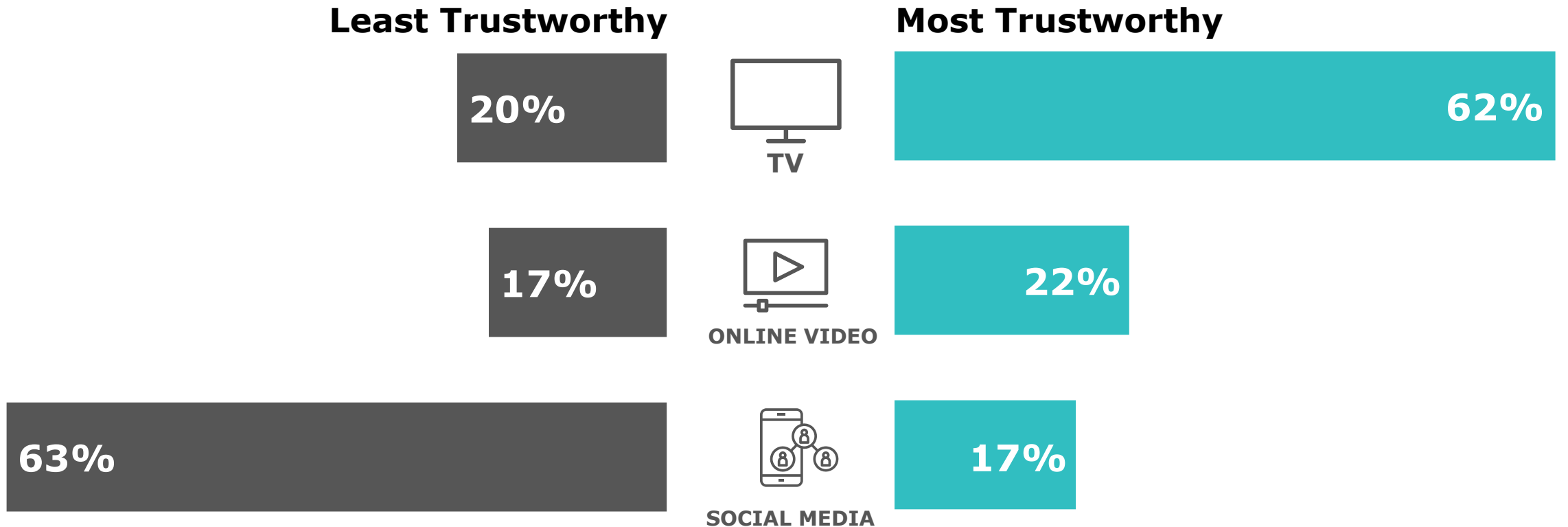
tv is most likely to drive purchases



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

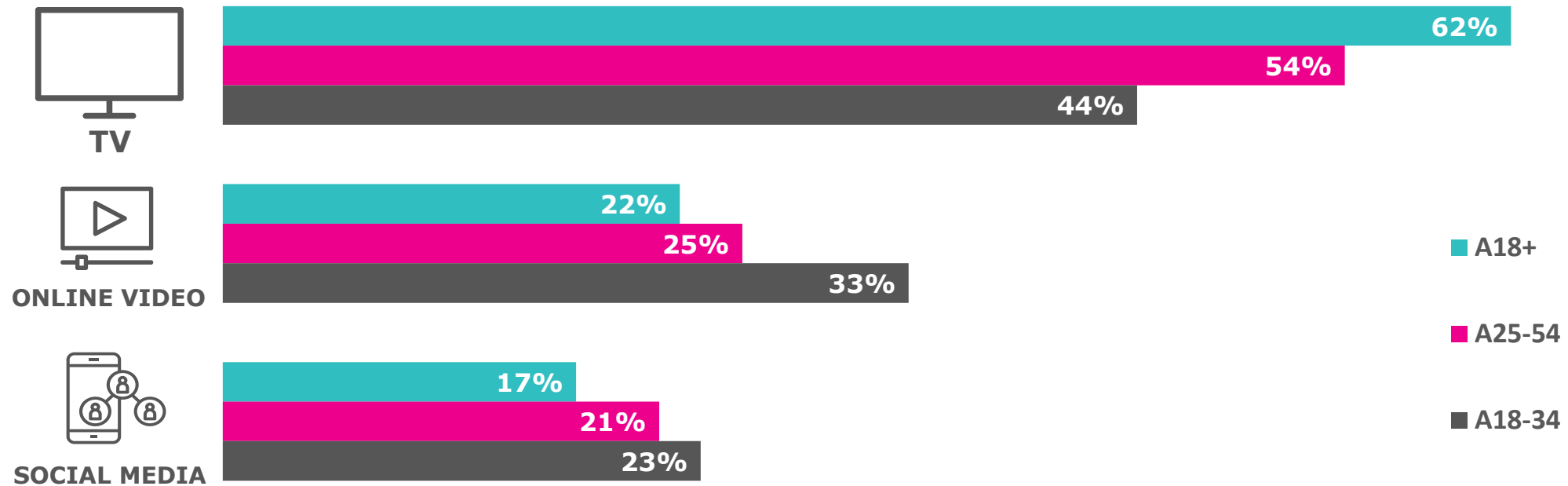
(while social media is the least trusted)



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

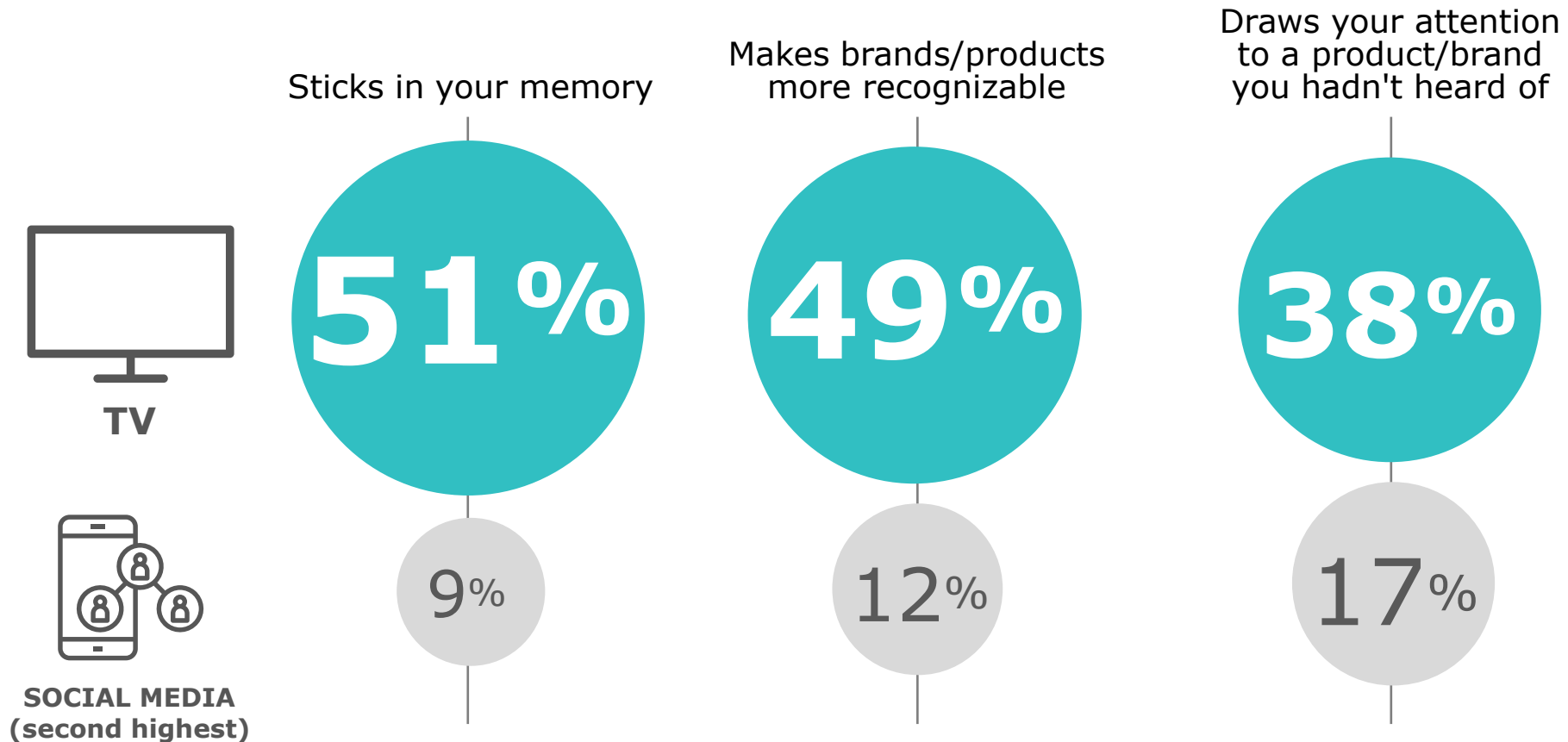
(by a long shot, and across every demo)



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

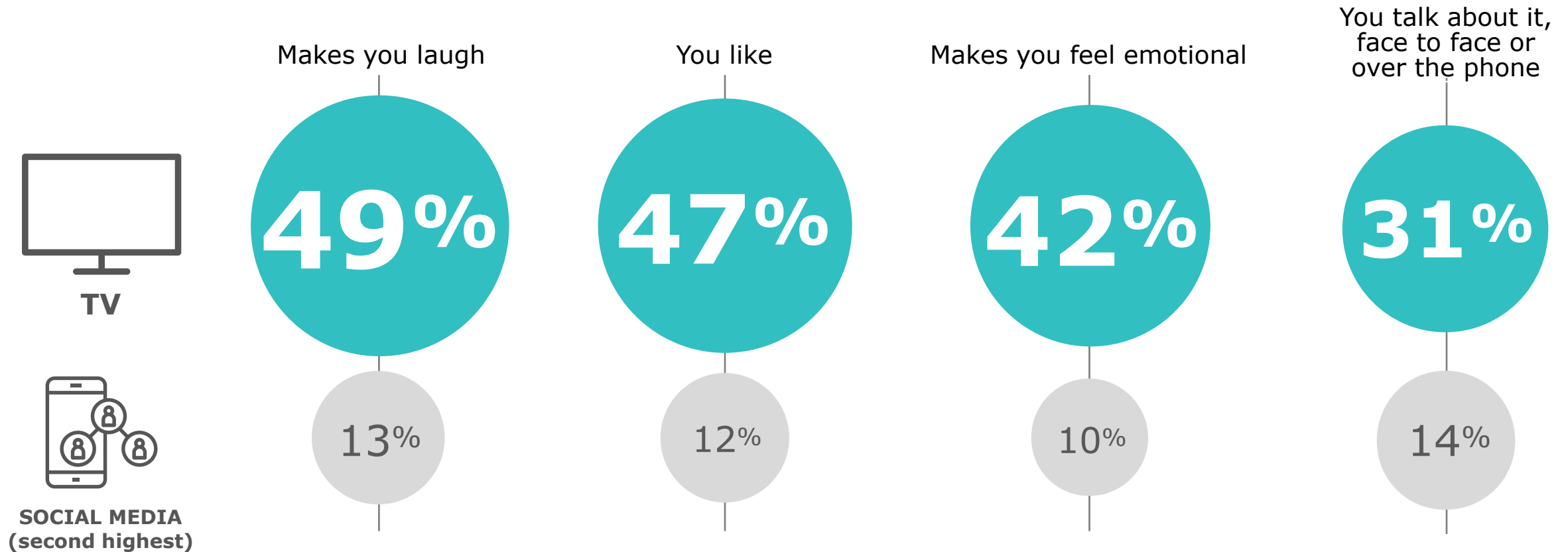
tv advertising has significant **impact**

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



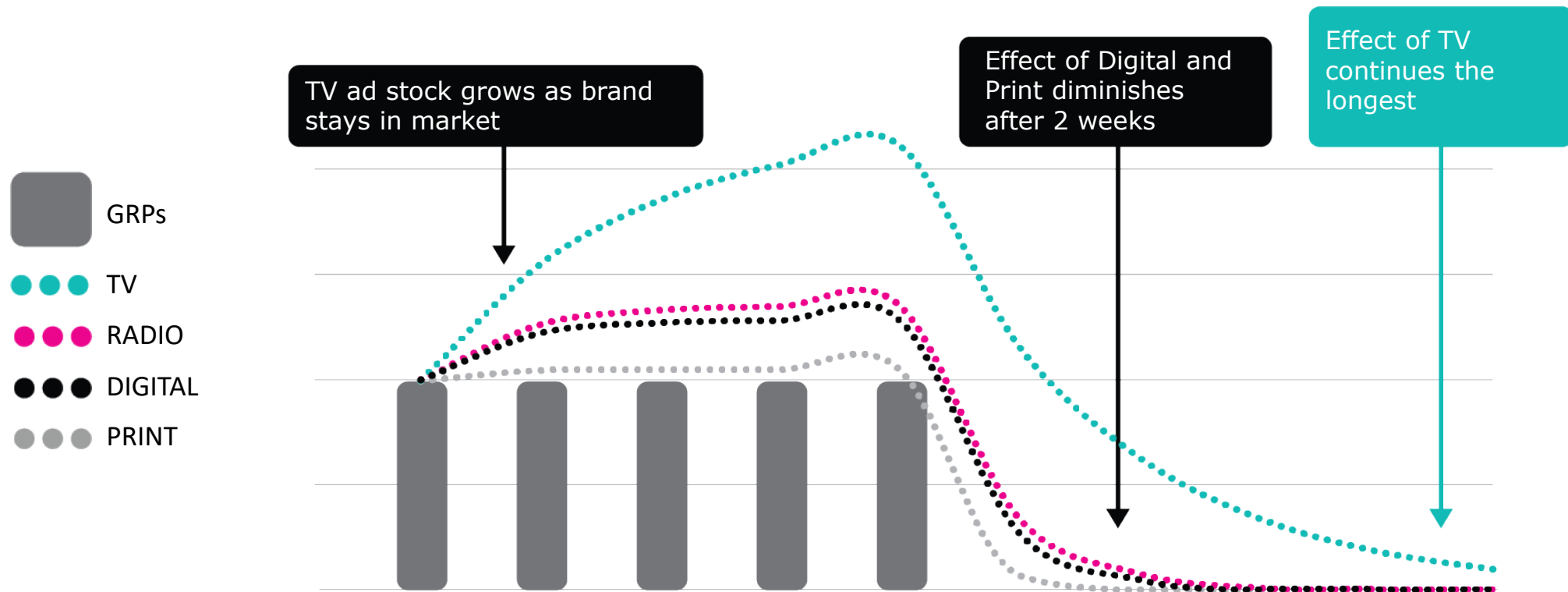
tv advertising is the most likely to generate emotion and conversation

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



tv ads deliver the biggest impact

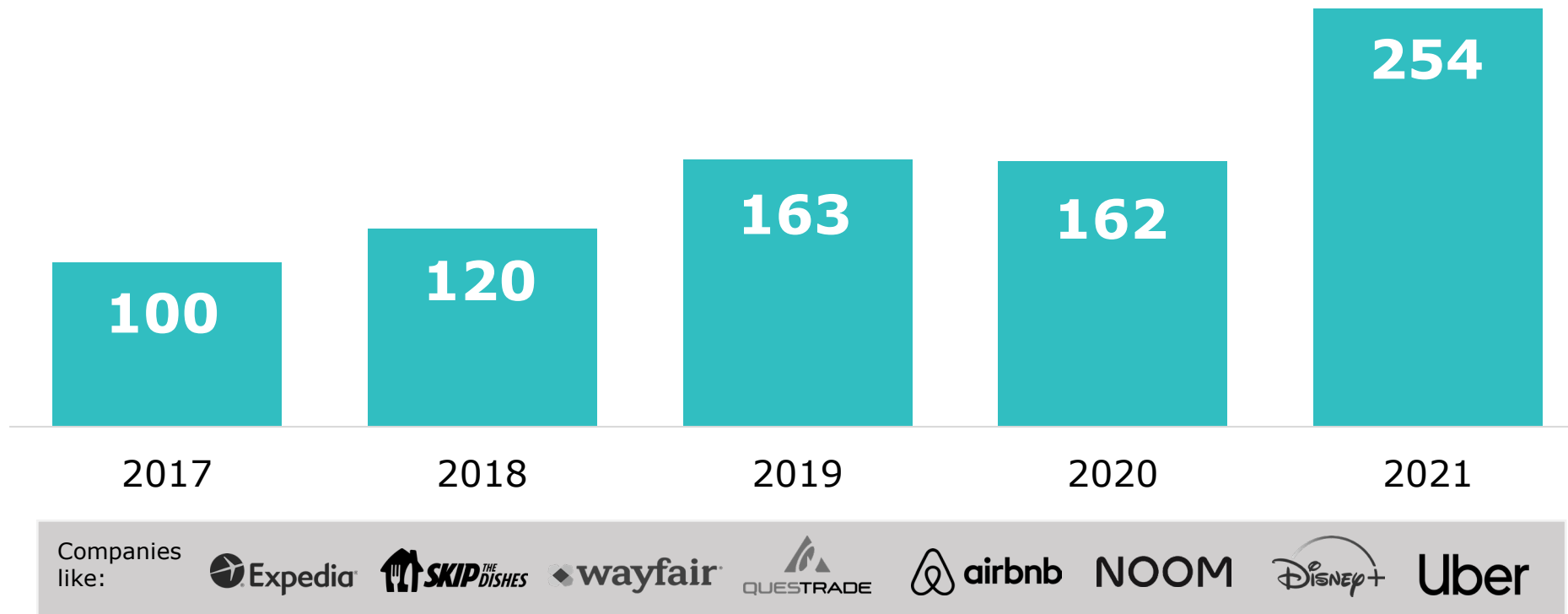
The adstock of a TV spot grows the fastest and lasts the longest



digital companies know **thinktv** works!

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

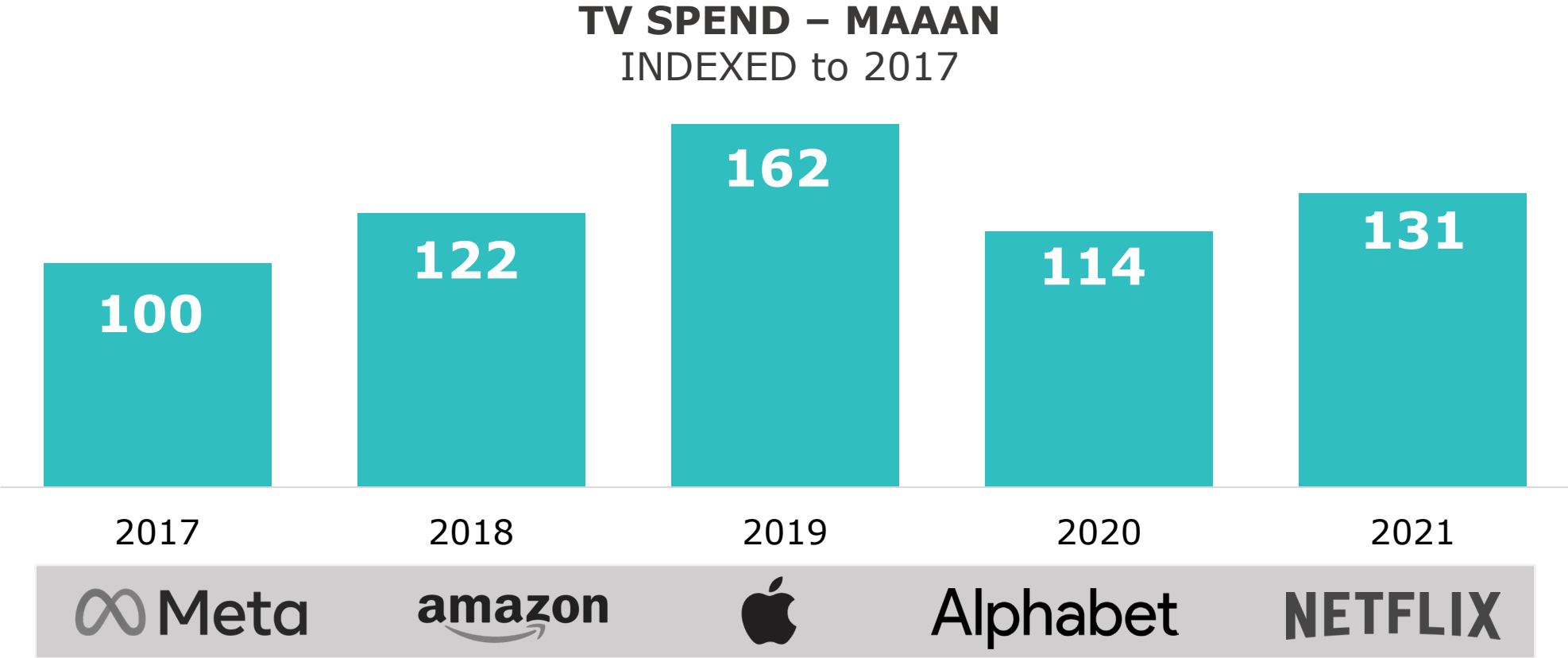
TV SPEND BY INTERNET BUSINESSES INDEXED TO 2017





“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

demand

**tv drives consumer
action**



tv works throughout the funnel

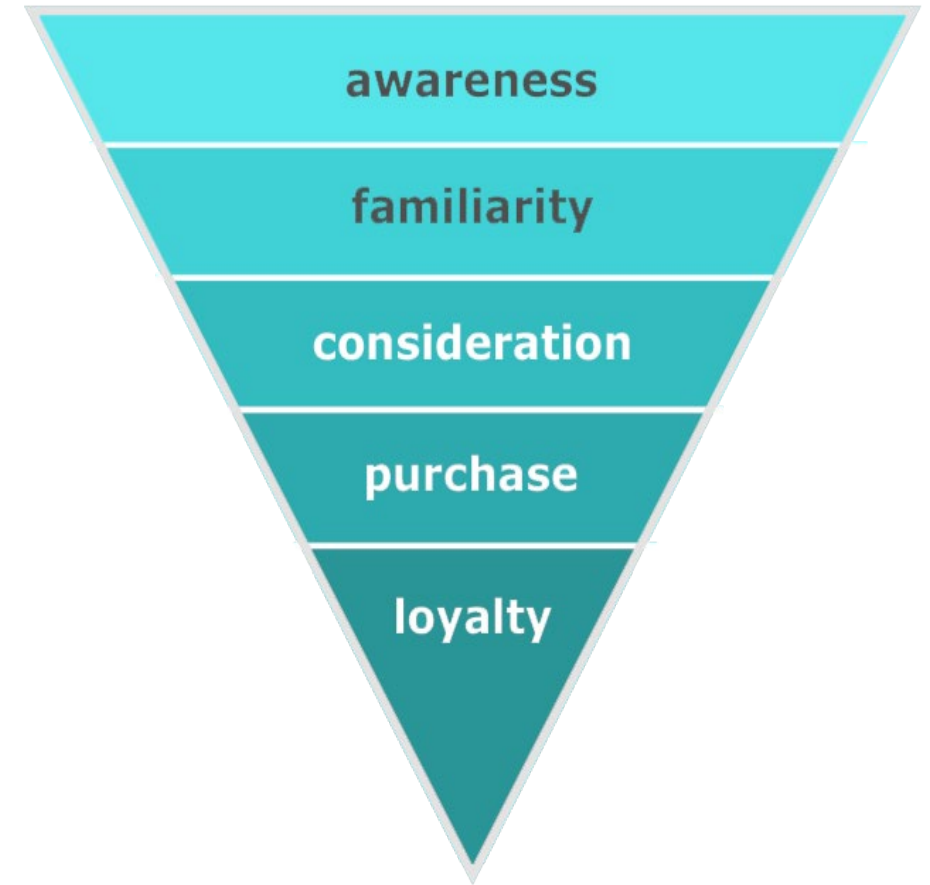
TV is your best store-front window

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

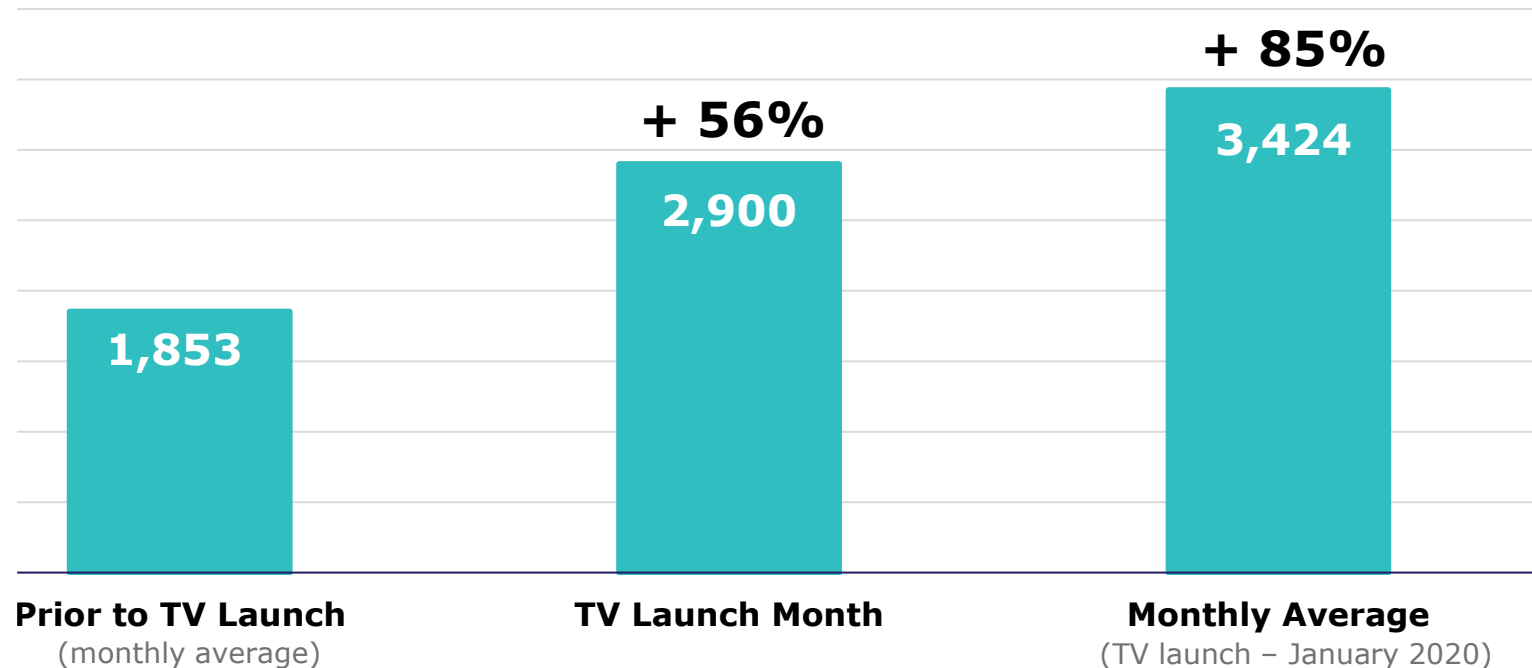
of both established and emerging companies

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.



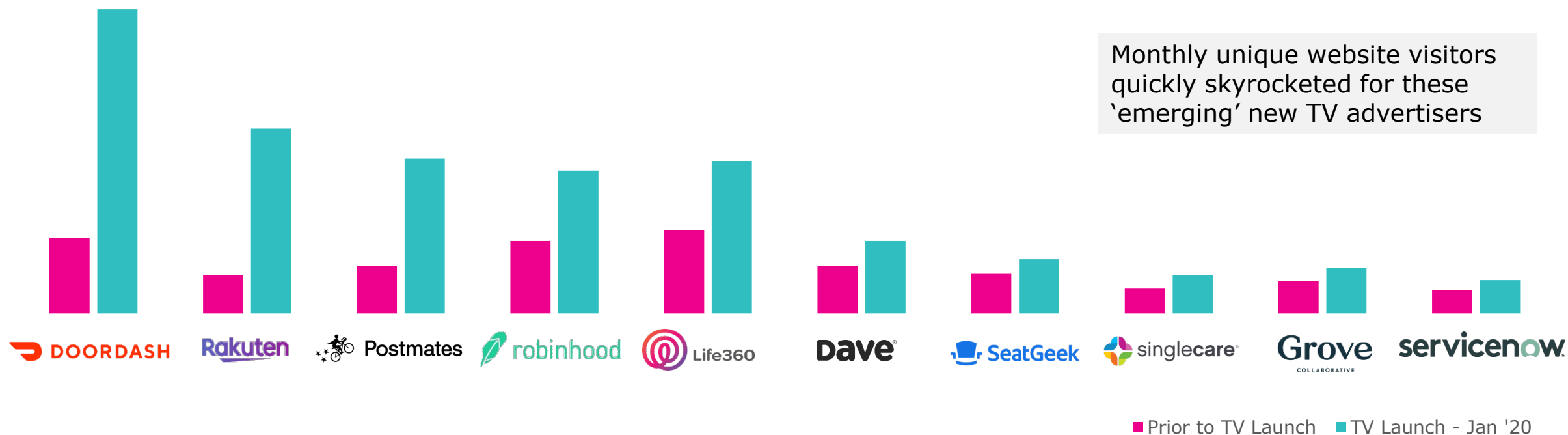
Source: VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spanish language cable TV, spot TV, syndication TV), Feb '18 – Jan '20 (calendar months). VAB analysis of Comscore mediametrix multiplatform media trend data, total audience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

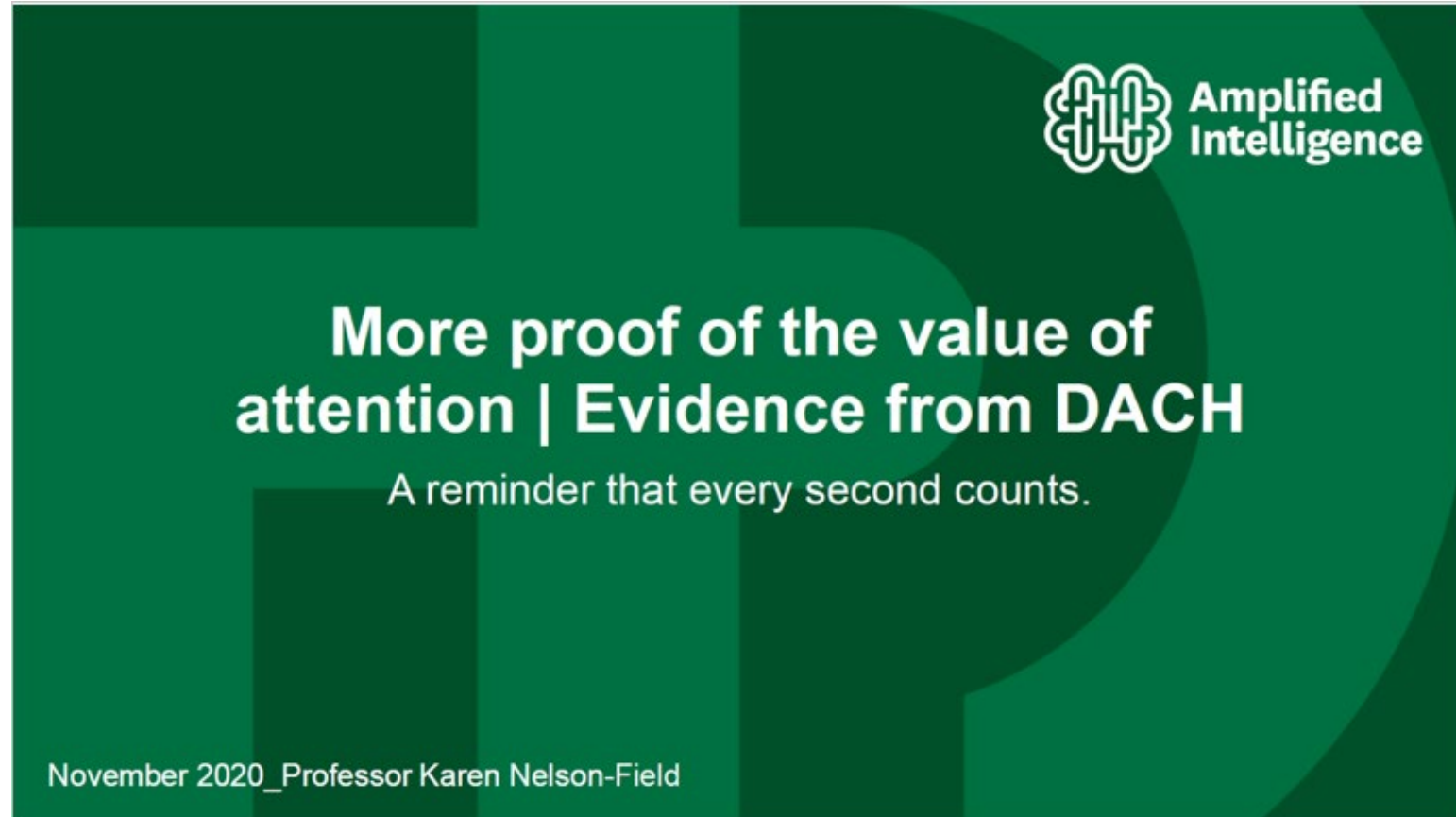
MONTHLY WEBSITE UNIQUE VISITORS (000) COMPARISON

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



Source: 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 mediameatrix 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

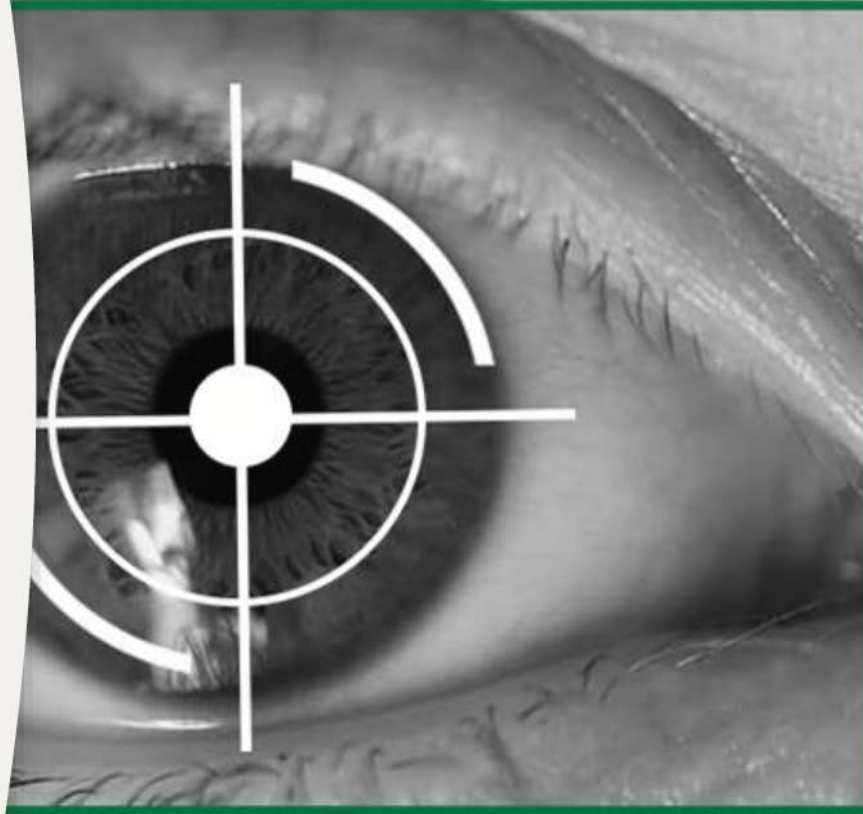


Passive
Attention



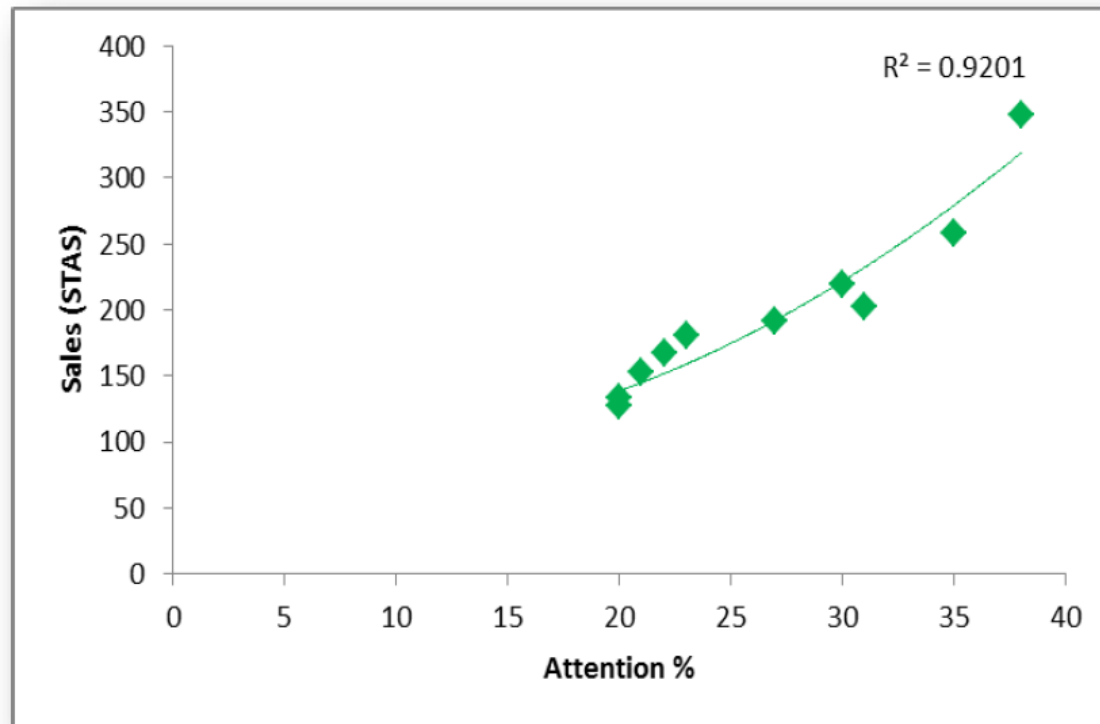
Non-Attention

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

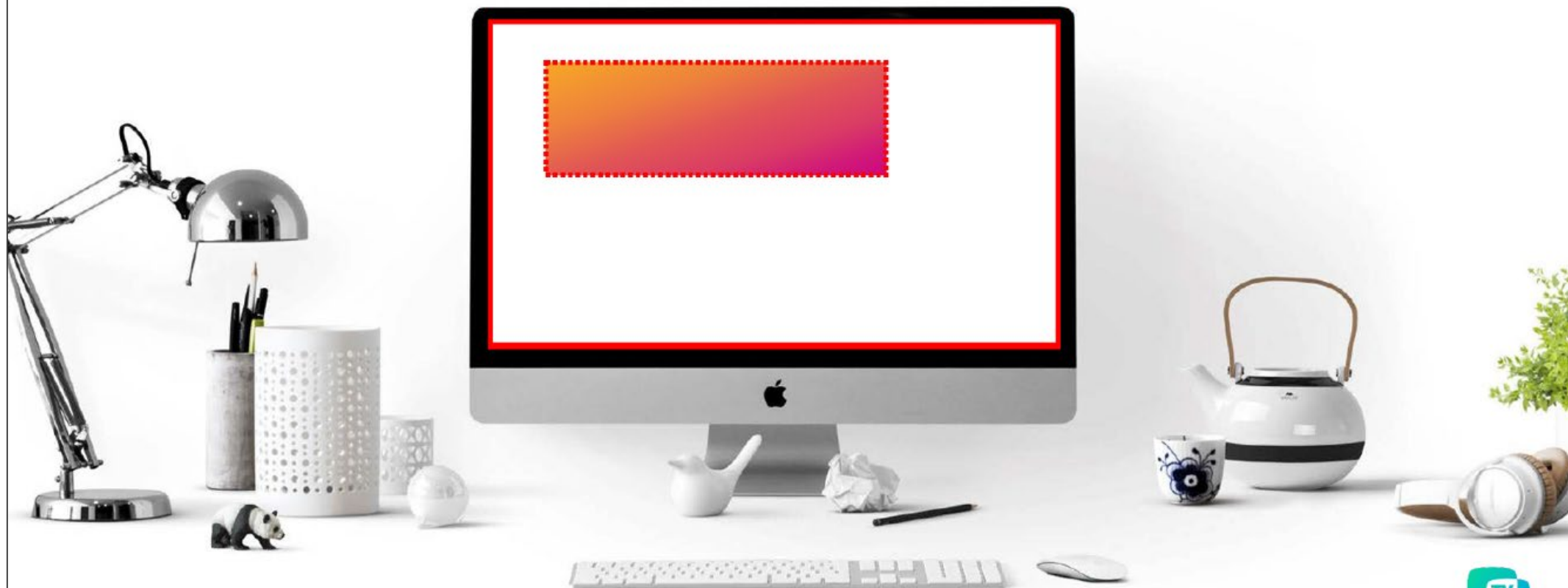
TV commands 2x as much active watching as YouTube and 14x that of Facebook, highlighting one of the key reasons for its ability to have the most impact on sales

			
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.

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

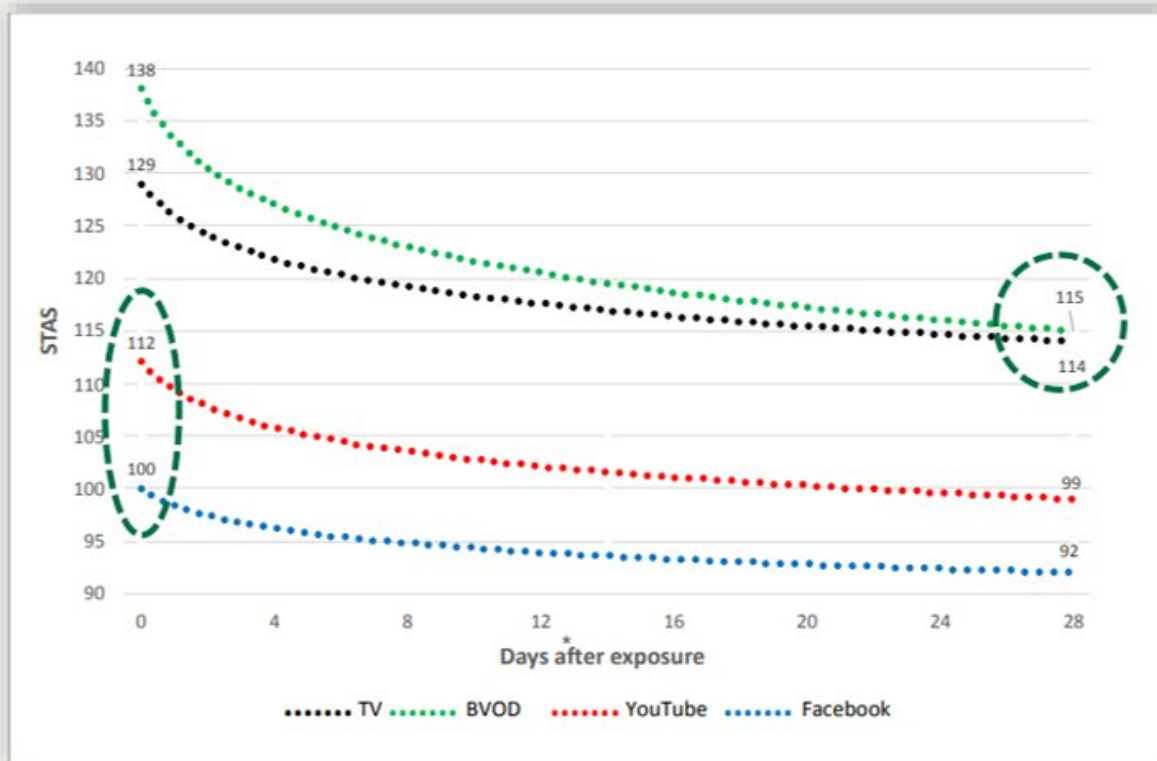
TV delivers more sales uplift than any other platform.



	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.



*BVOD Modelled

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



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^{tv}

October 2020



PEAK PERFORMANCE

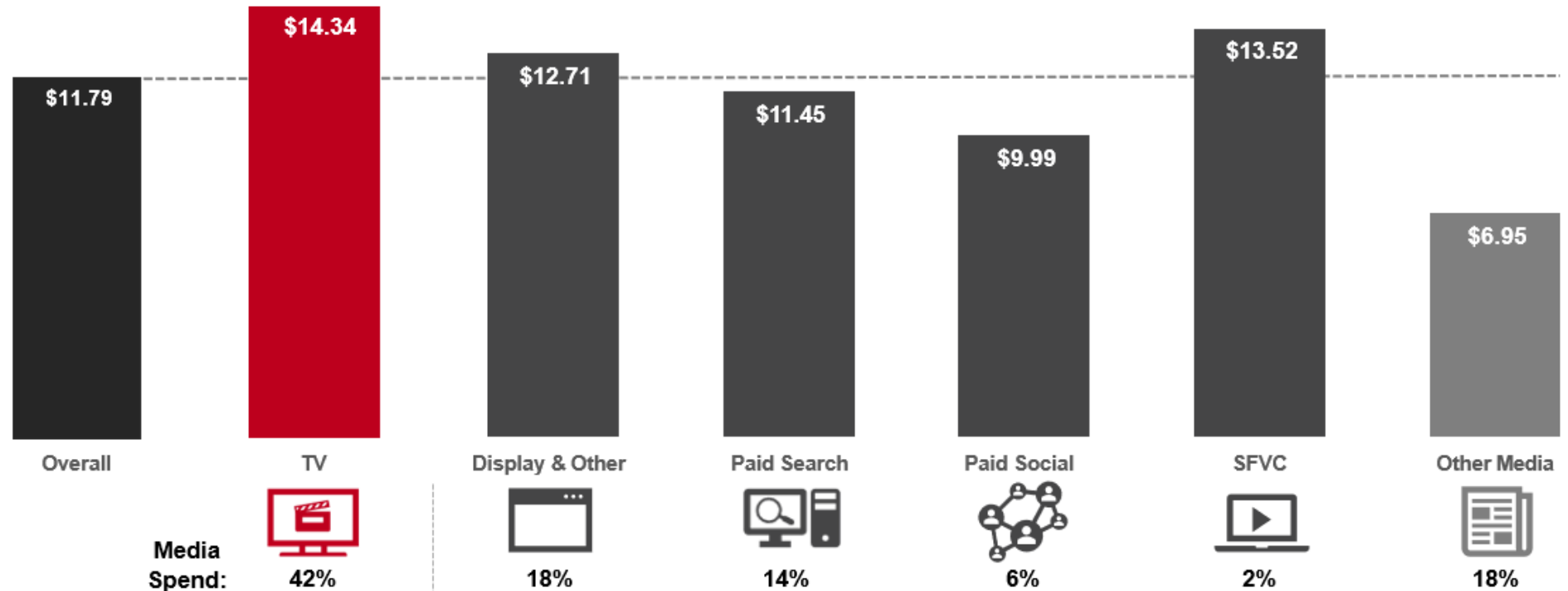
DRIVING ADVERTISING
EFFECTIVENESS THAT LASTS

think^{tv}

>
accenture

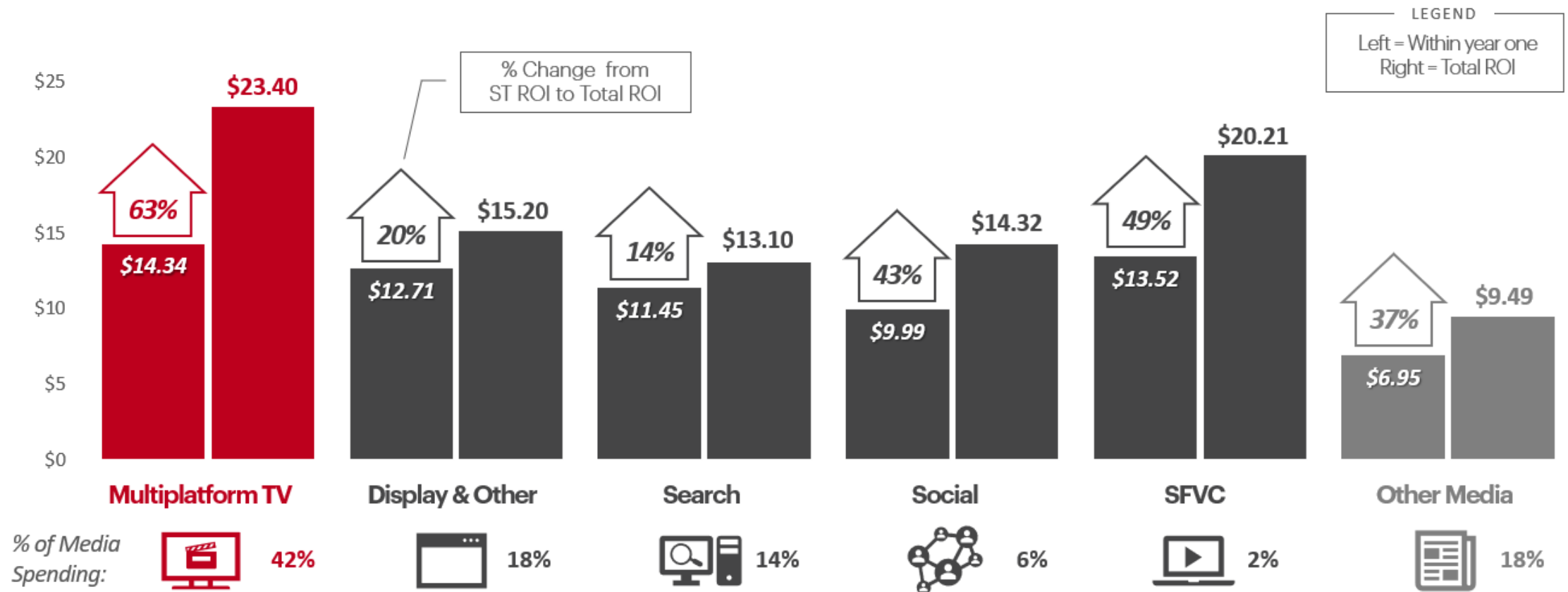
TV HAS THE HIGHEST ROI OF ALL MEDIA

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



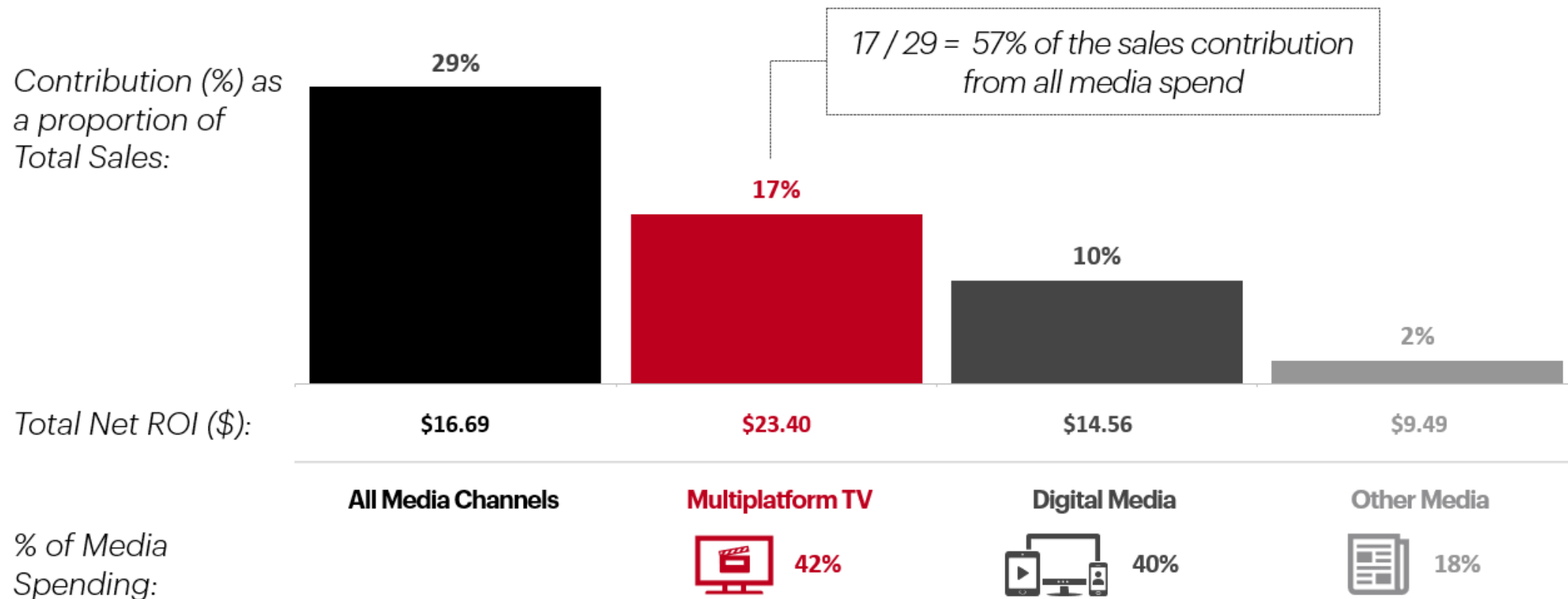
Source: [Peak Performance: Driving Advertising Effectiveness That Lasts](#)

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



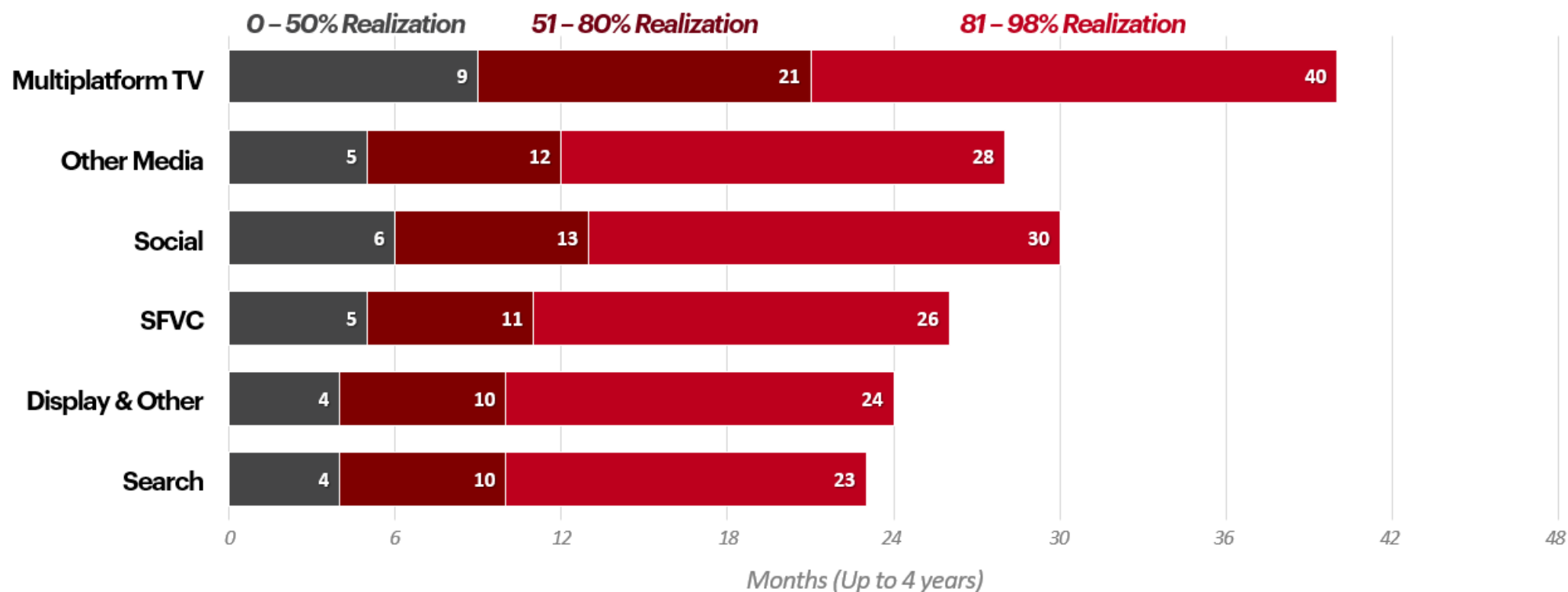
Source: [Canadian Media Attribution Study](#)

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](#)



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

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}

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 »](#)

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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 2021 – May 29 2022

Slide 4: TV campaign based on a 900 GRP campaign (6 weeks x150 GRPs), Sept 13 2021 to May 29, 2022, Total Canada, Ind. 2+, Numeris 2021-22 pop est.

Slide 8: Television: Numeris PPM, Total Canada, Total TV, Consolidated, All Locations, A18+, M-Su 2a-2a, Sept 13 2021 – May 29 2022
Internet (Daily Reach), Radio, Daily Newspaper, Magazine: Numeris RTS, Canada, Spring 2022
Internet (Weekly Hours): comScore Media Metrix; Multi-Platform; Sept 2021 to April 2022 (Note: Numeris pop est. used to calculate average weekly hours per capital).

Slide 9: Mediastats, Total Canada, Jan 2021, Jan 2022, BDU Profile Report, Numeris, PPM, Tot Canada, Total TV, All Locations, M-Su 2a-2a, Sept 13 '21 to May 29 '22

Slides 10,11: Television: Numeris PPM, Total Canada, Total TV, Consolidated, All Locations, Ind 2+, M-Su 2a-2a, Sept 13 2021 to May 29, 2022 | Facebook.com, Instagram.com, Twitter.com, TikTok.com, Snapchat, Inc.: comScore Media Metrix Multi-Platform, Canada, Sept 2021 – April 2022 | YouTube: comScore Metrix MultiPlatform, Canada, Sept – Apr 2022 | (Note: Numeris population estimates used to calculate average weekly hours per capita for digital media)
Video

Slide 12: Numeris PPM, Total Canada, Total TV, All Locations, M-Su 2a-2a, Sept 13 2021 to May 29 2022. 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, [*Optimizing vs Minimizing Media*](#) August 2018

Slides 17-21 : YouGov BrandIndex Tracking, Total Canada, A18+, July 2022

Slides 22-23: Ipsos [*Ad Nation 2020*](#)

Slide 24: GroupM Canada, 2016; Marketing Mix models across Consumer Electronics, Retail, Finance, Auto and CPG; [*Target the \(Whole\) Market*](#)

Slides 25-26: Total Canada/Annual/Numerator; for full list of brands please contact thinktv. [*Online Businesses on TV*](#).

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