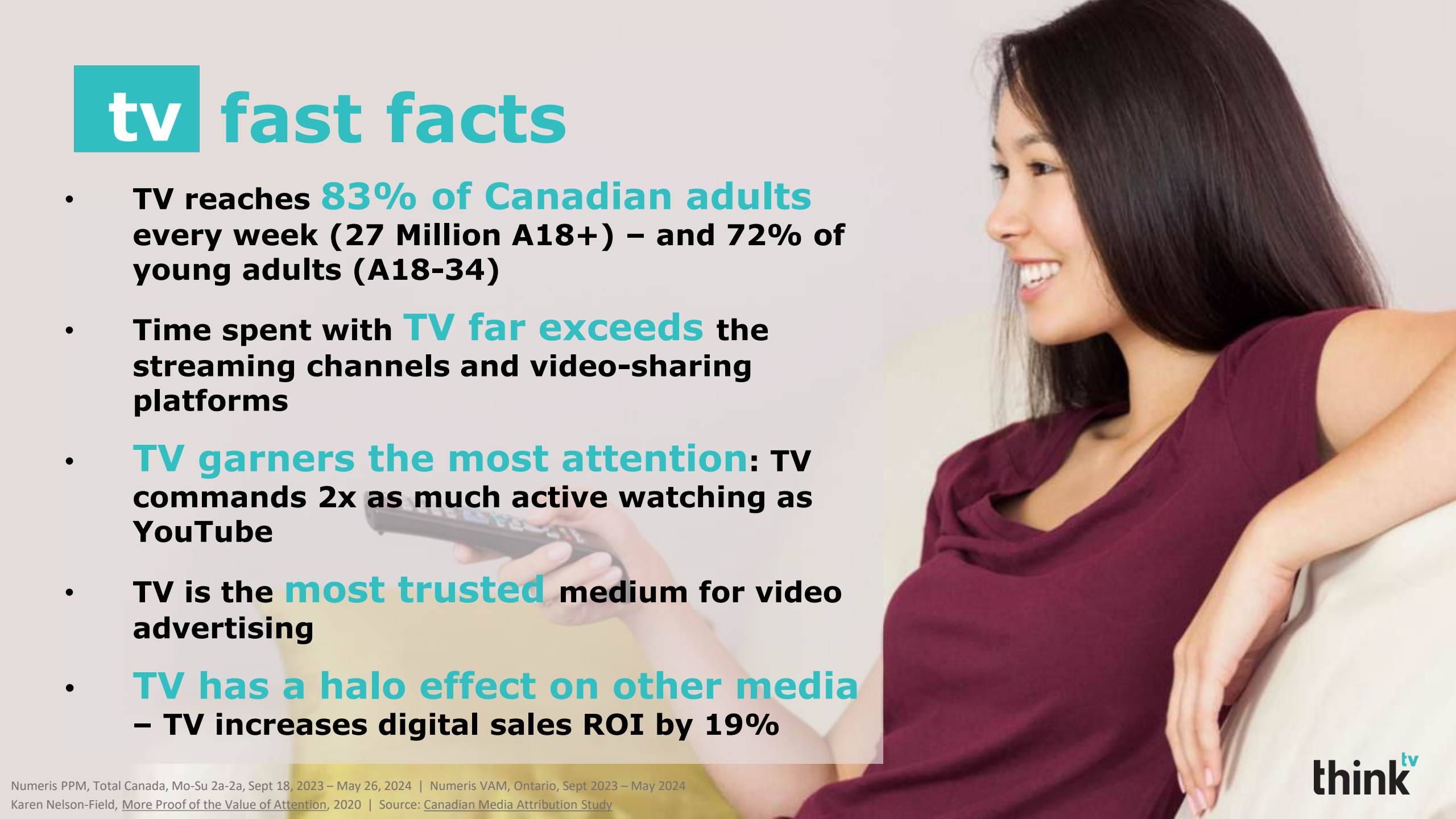
the power of tv
in an attention economy
think tv

tv fast facts

- TV reaches **83% of Canadian adults** every week (27 Million A18+) – and 72% 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%



Numeris PPM, Total Canada, Mo-Su 2a-2a, Sept 18, 2023 – May 26, 2024 | Numeris VAM, Ontario, Sept 2023 – May 2024
Karen Nelson-Field, More Proof of the Value of Attention, 2020 | Source: Canadian Media Attribution Study

think tv

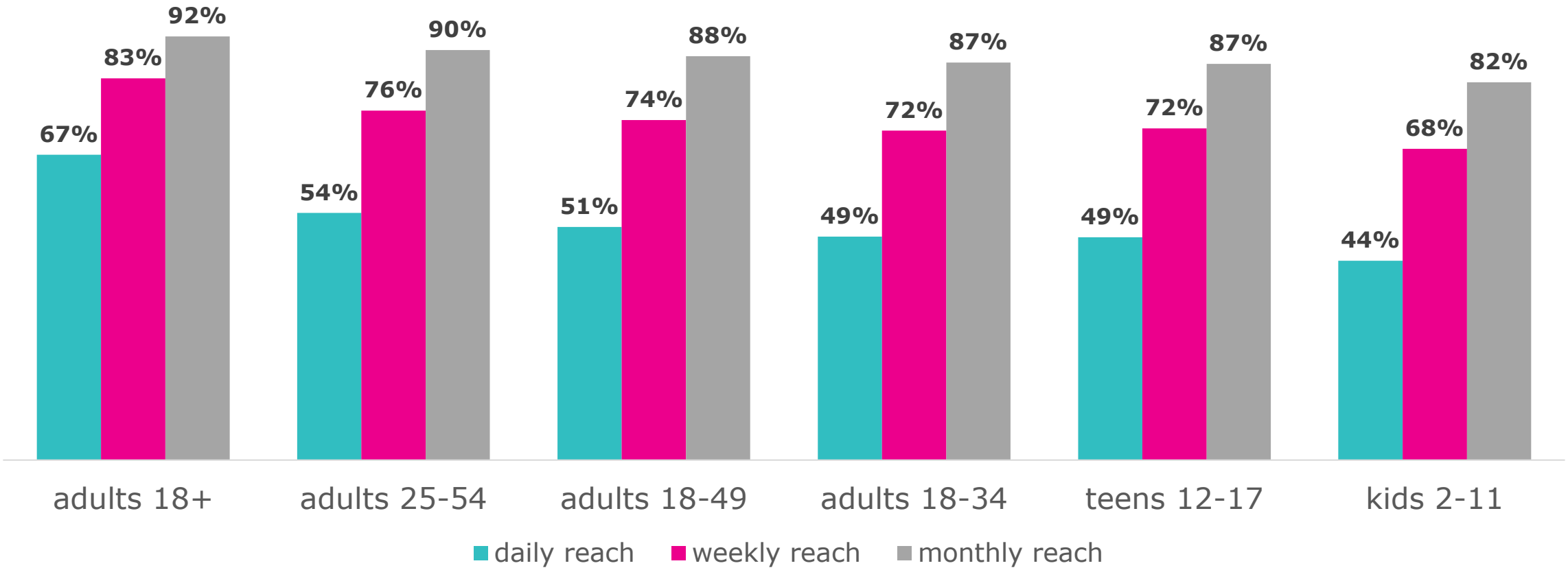
tv is powerful because it delivers:

reach

tv’s reach is vast & fast

tv reaches 92% of Canadians (18+)

every month



Source: Numeris PPM, Total Canada, Sep 18, 2023 – May 26, 2024
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.

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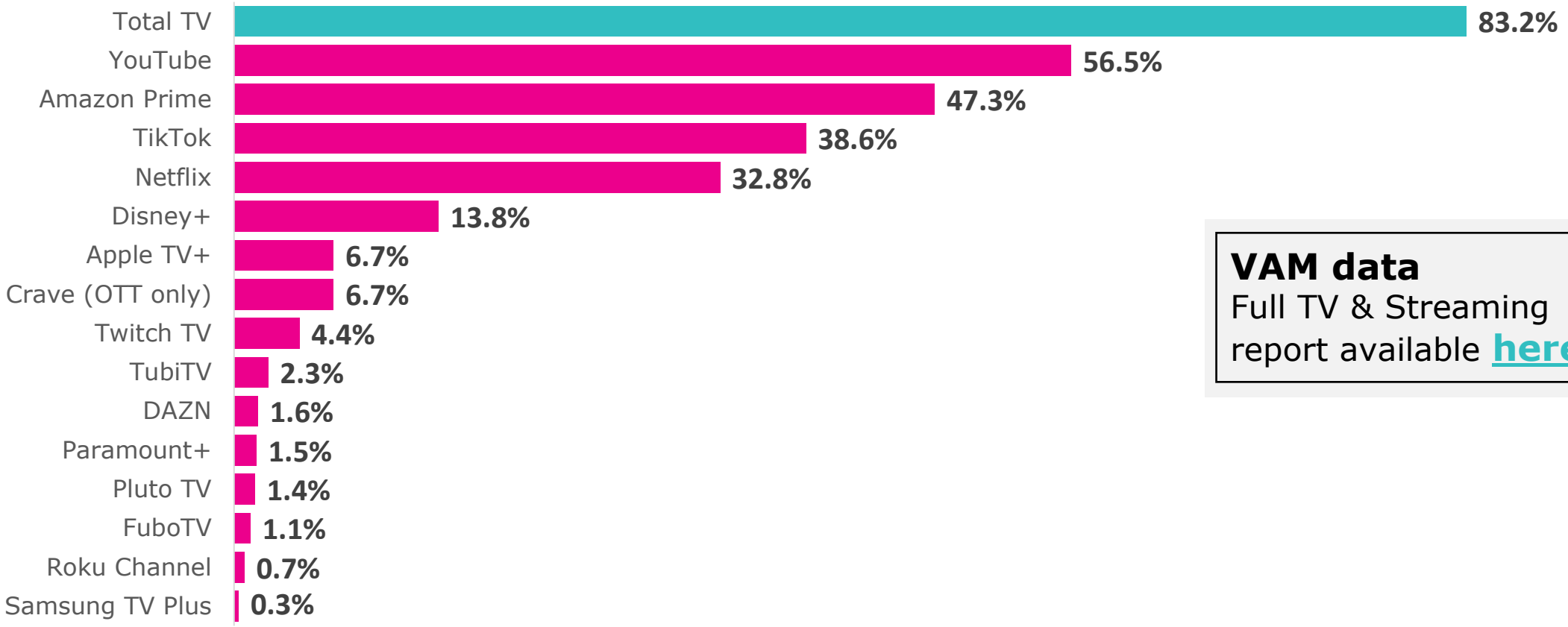
tv's reach far exceeds all streaming services

AVERAGE WEEKLY REACH%
ADULTS 18+ | Ontario



VAM data
Full TV & Streaming report available here

Source: Numeris VAM, Sep 18, 2023 – May 26, 2024
Total TV defined as linear TV and broadcaster streaming services | Streaming Services are primarily commercial free and include in-home viewing only

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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

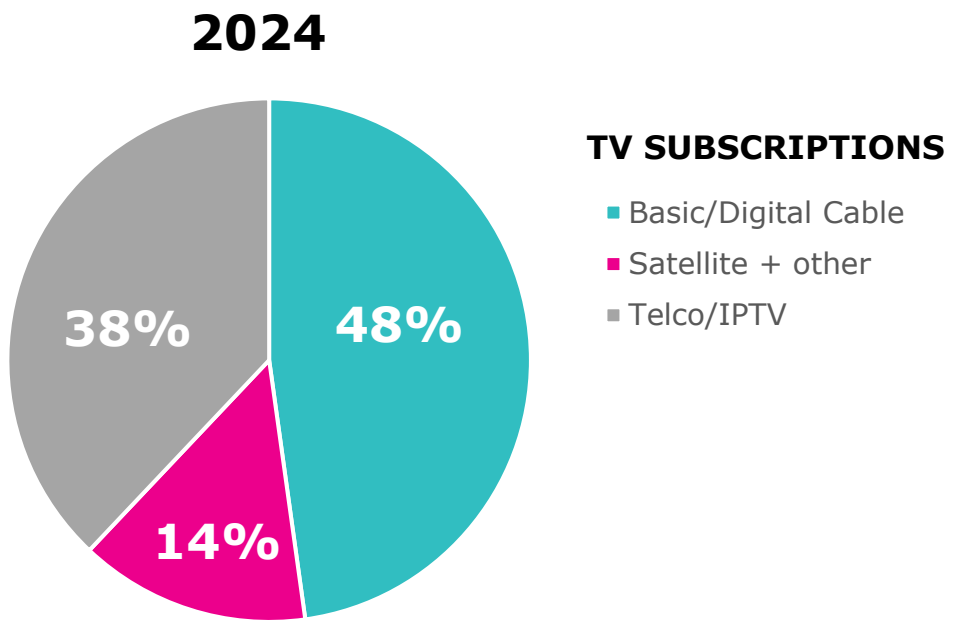
think tv

9.7 million paid tv subscriptions

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

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 content.

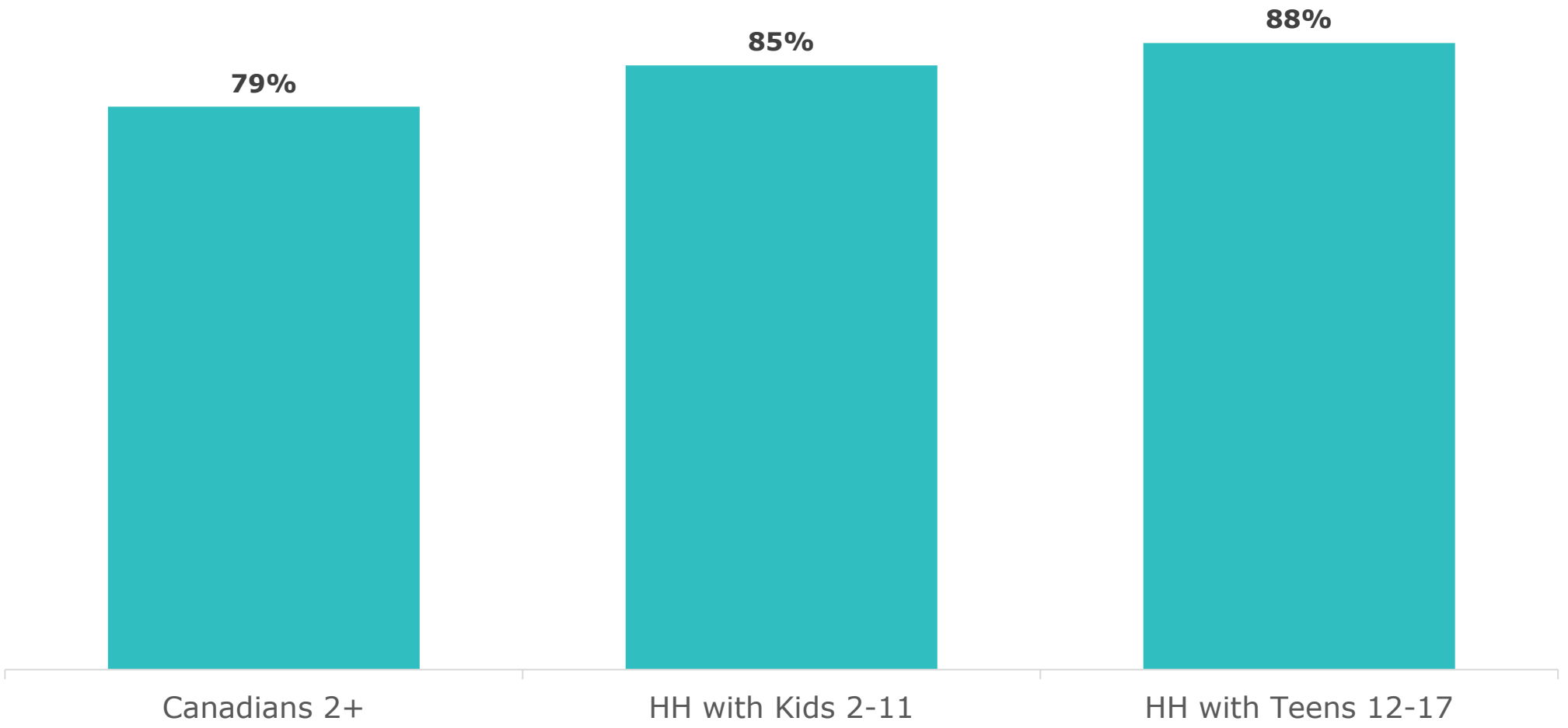
	January '23	January'24	Index (YOY)
Total Paid Subs	9,976,228	9,725,802	**(3%)**
Basic/Digital Cable	4,942,166	4,648,356	(6%)
Satellite	1,493,191	1,363,613	(9%)
Telco/IPTV (Internet Protocol TV)	3,517,281	3,690,360	+5%
Other	23,590	23,473	0%



Source: Mediastats, BDU Profile Report, Total Canada Off-Air is not included. IPTV = Internet Protocol Television: the delivery of television content over Internet Protocol (IP) networks, e.g. Bell Fibe TV, Telus/Optik TV.

79% of Canadians live in a home with a smart tv

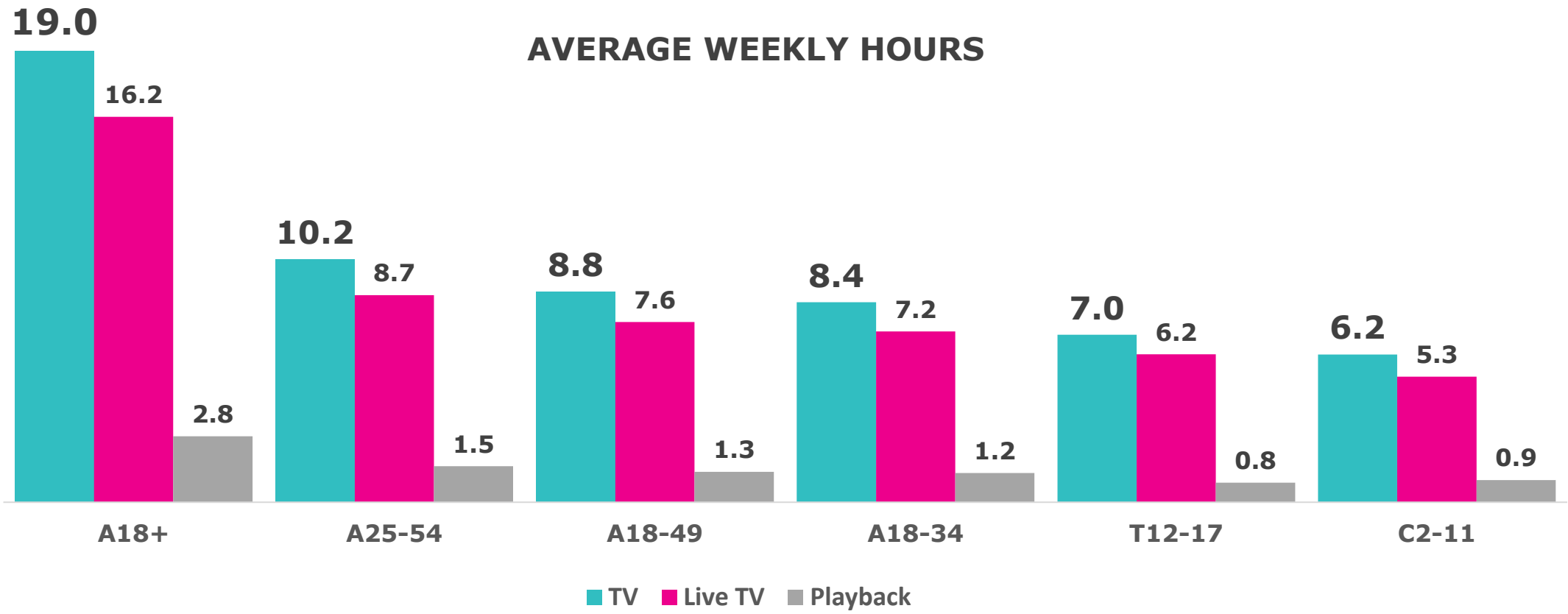
ownership goes up in households with children



Source: Numeris PPM Canada, Sep 18, 2023 – May 26, 2024 , total Canada

Canadians watch a lot of tv

and most of it is live



Source: Numeris, Total Canada, Sep 18, 2023 – May 26, 2024, Average Weekly Hours per Capita
Linear TV = viewing to any live broadcaster content (streamed on any platform and linear TV) plus broadcaster content recorded on PVR (with commercial load intact) that is viewed within 7 days of initial broadcast. Does not include on demand streaming.

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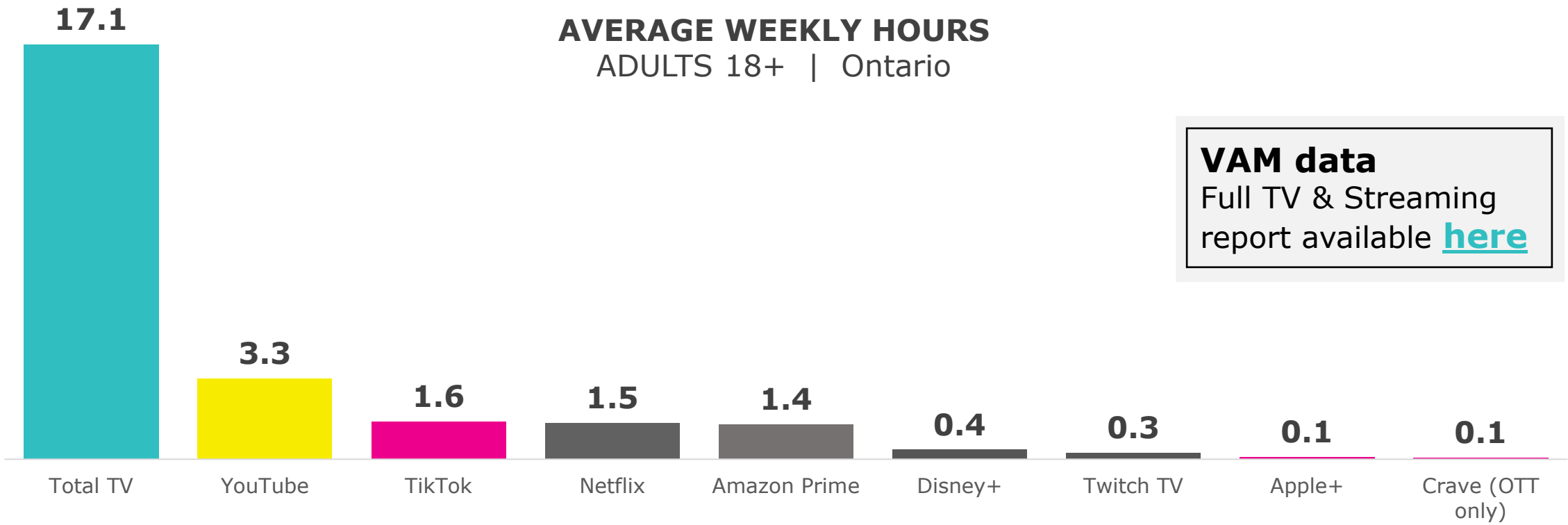
Total TV dominates time spent with video



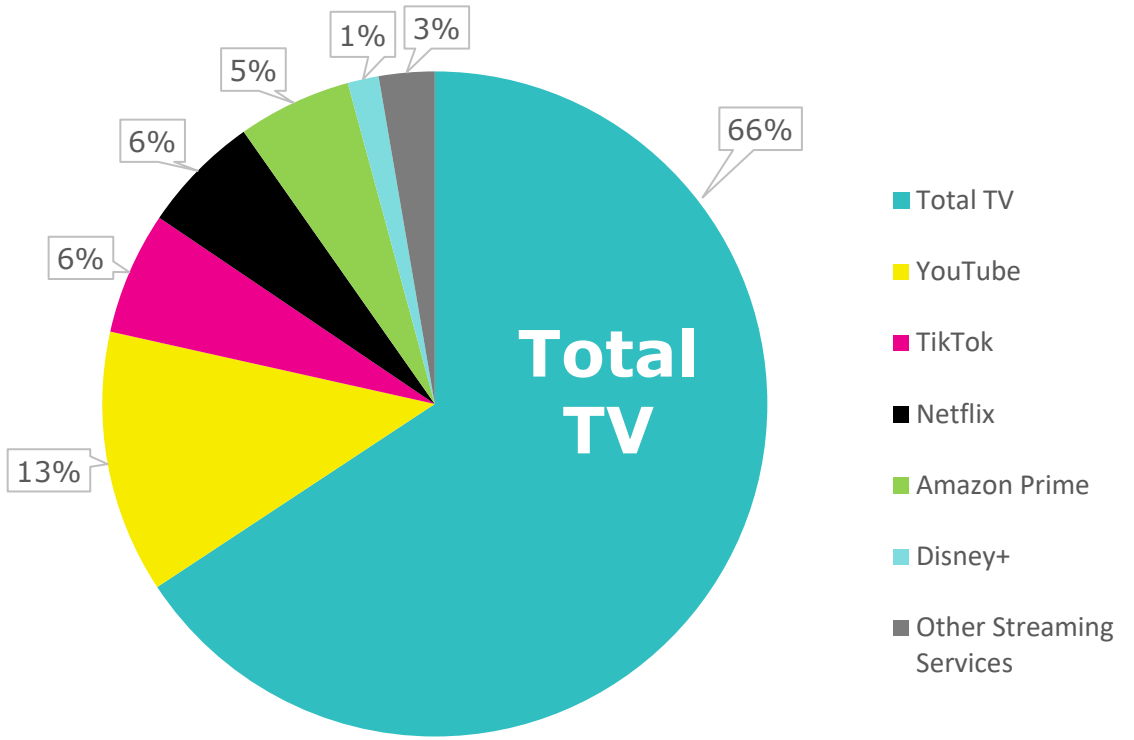
VAM data
Full TV & Streaming report available **here**

Source: Numeris VAM, Sep 18, 2023 – May 26, 2024
Total TV defined as linear TV and broadcaster streaming services | Streaming Services are primarily commercial free and include in-home viewing only

Total TV dominates time spent with video

SHARE OF VIDEO
Ontario

ADULTS 18+

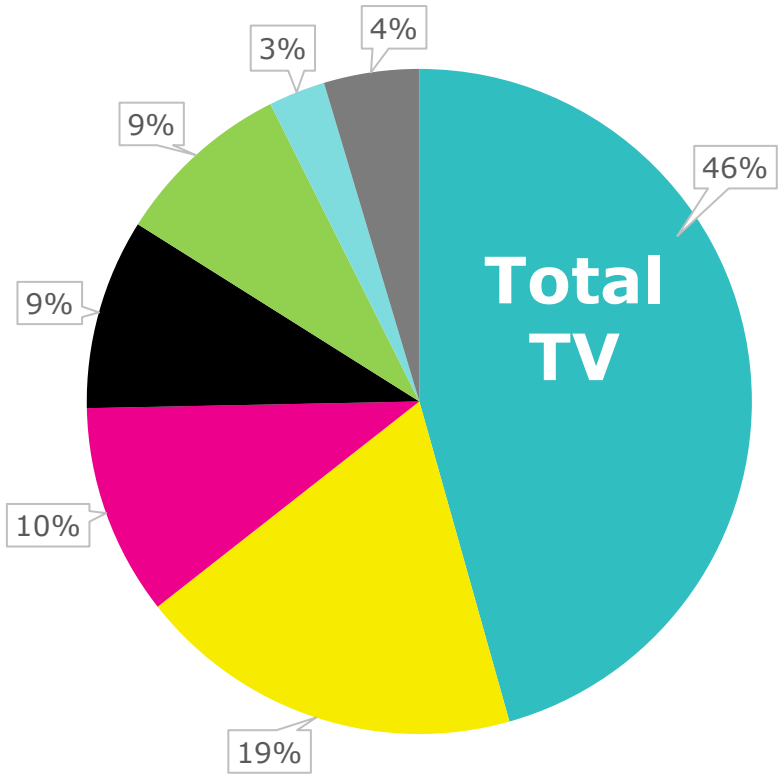


VAM data
Full TV & Streaming report available here

Source: Numeris VAM, Sep 18, 2023 – May 26, 2024
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.

...in all key demos

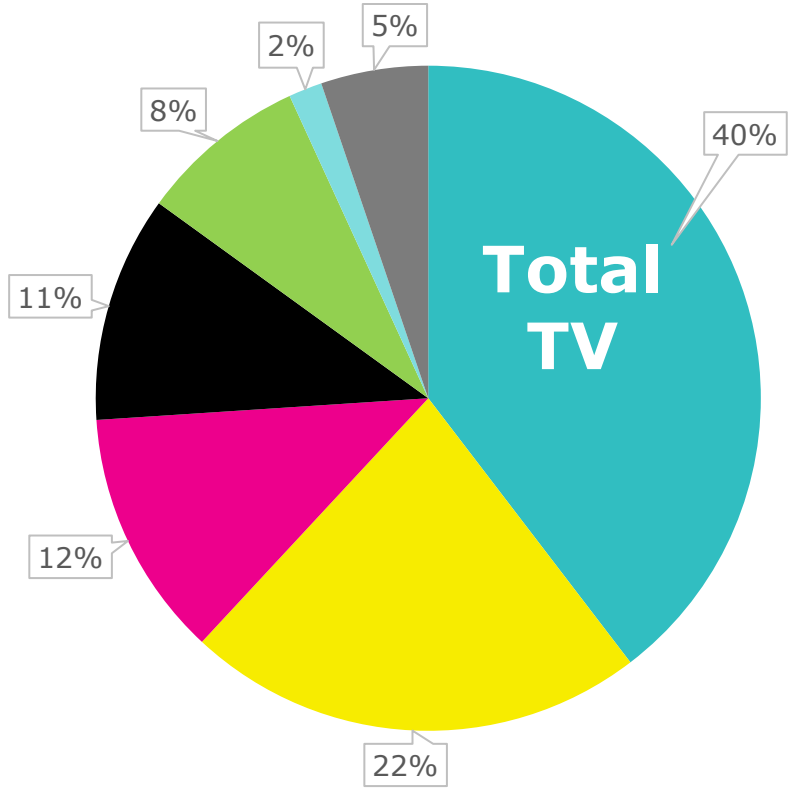
ADULTS 25-54



SHARE OF VIDEO
Ontario

- Total TV
- YouTube
- TikTok
- Netflix
- Amazon Prime
- Disney+
- Other Streaming Services

ADULTS 18-34



Source: Numeris VAM, Sep 18, 2023 – May 26, 2024
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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.

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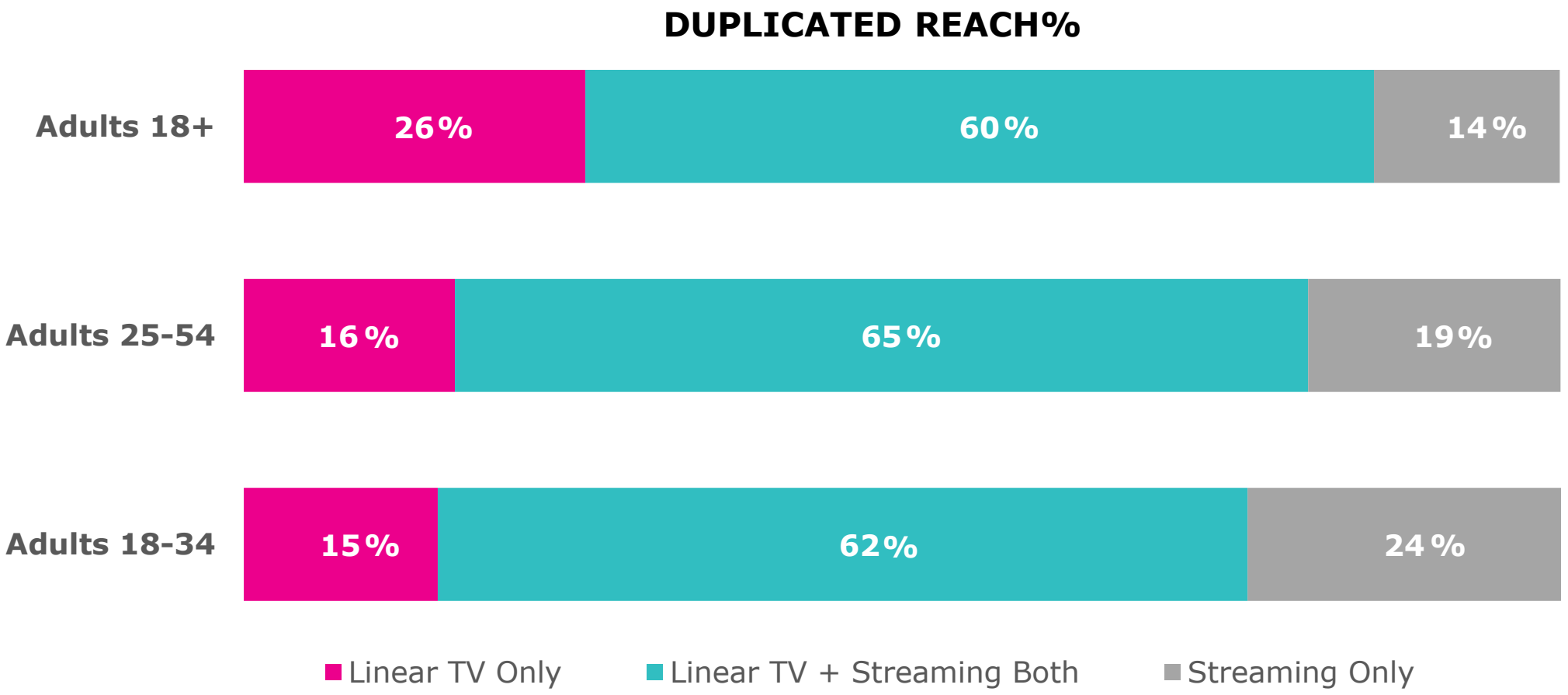
majority of Canadians access both linear TV & streaming services

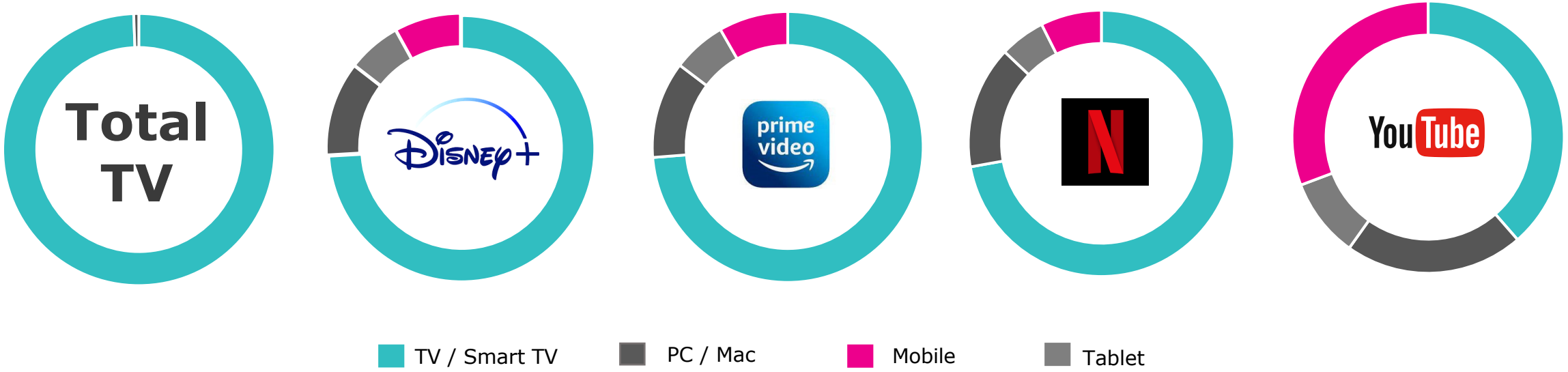


Source: Numeris VAM, Sep 18, 2023 – May 26, 2024, Ontario, % of composition of average weekly reach
Streaming Channels include: Prime Video, Netflix, Disney+, Apple+, Crave (OTT only), CBS News, Twitch TV, ET Online US, TubiTv, DAZN, Paramount+, PlutoTv, FuboTV, Daily Motion, Roku Channel, Crunchroll, Discovery+, TED, SamsungTV , YouTube

big screen, big attention

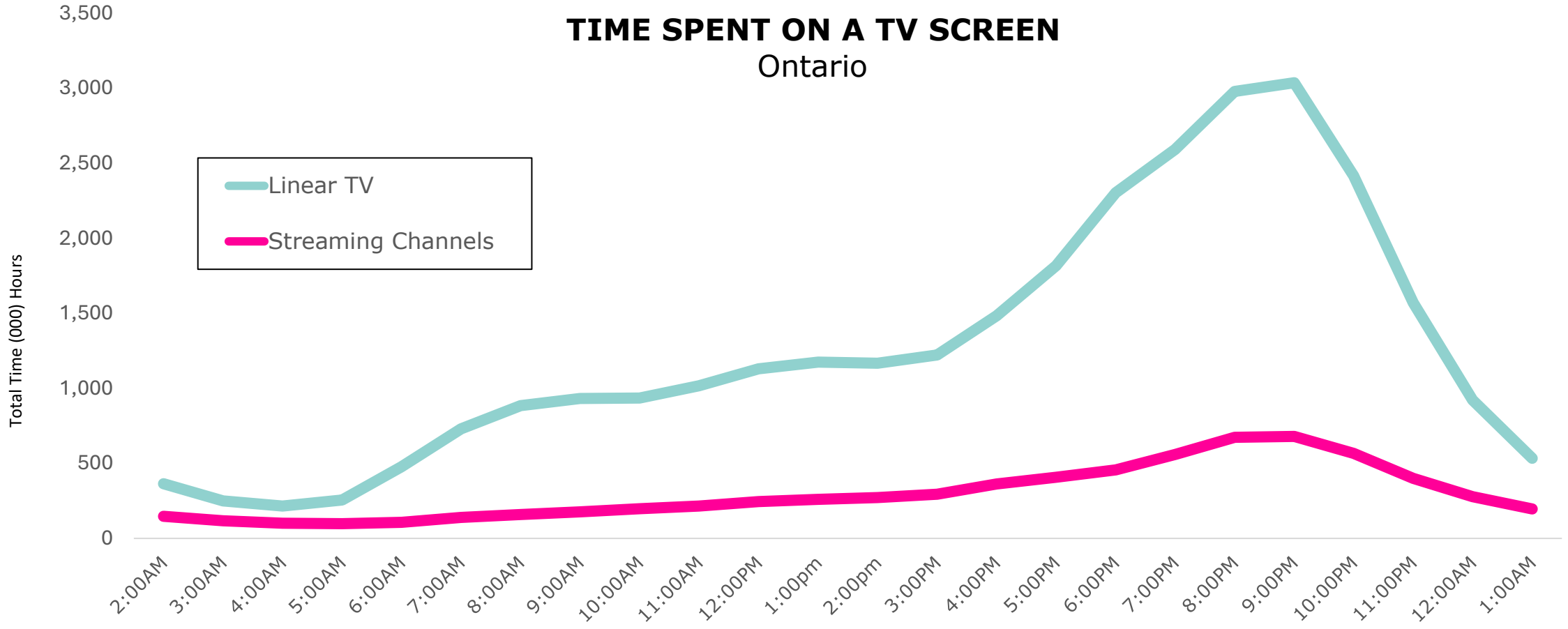
TV screens drive the highest advertising recall: **34% more** than ads seen on a computer, and **60% more than on a tablet or smartphone**

SHARE % OF TOTAL TUNING BY DEVICE
Ontario



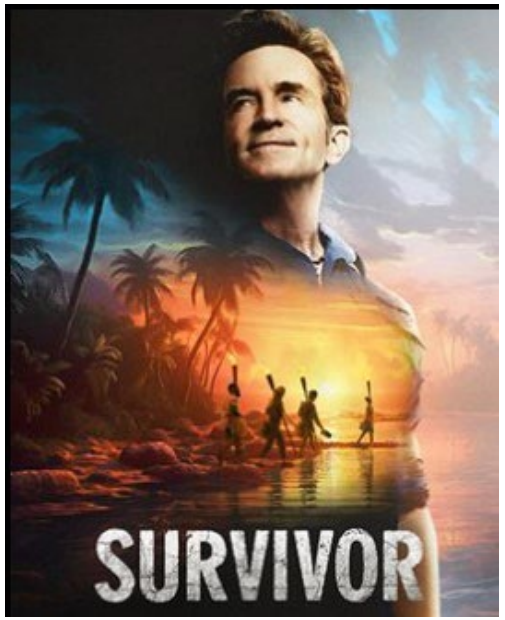
Source: Numeris VAM, Sep 18, 2023 – May 26, 2024 | Adults 18+
Source: thinkbox, "Room with the viewers: why advertising thrives in the living room", March 2024
Total TV defined as linear TV and broadcaster streaming services | Streaming Services, YouTube include in -home viewing only | Streaming Services are primarily commercial-free

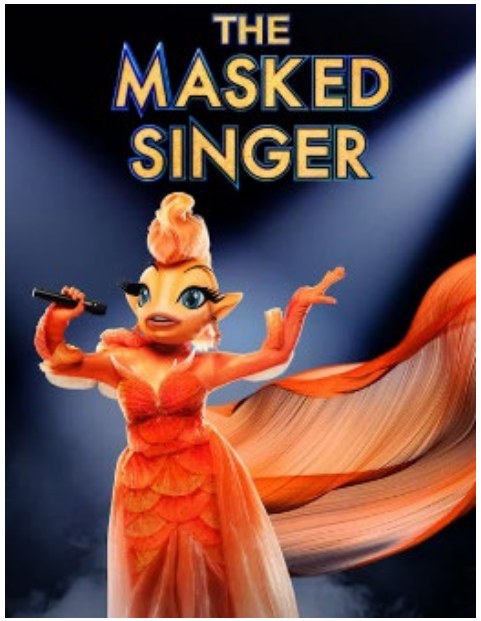
tv dominates prime time on the big screen

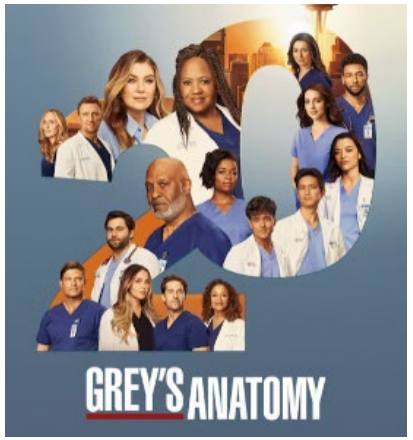


Source: Numeris VAM Sep 18, 2023 – May 26, 2024 , Ontario Adults 18+, In-home viewing and viewing on a Big Screen (Smart TV/CTV), Ontario | Streaming Channels include: Prime Video, Apple TV+, CBS News, Crave Pure Play, Crunchyroll, DAZN, Discovery+, Disney+, FuboTV, Netflix, Paramount+, PlutoTV, TwitchTV, YouTube)

what are they watching?







top 10 tv shows (English)

ADULTS 18+	Channel	AMA (000)
TRACKER	CTV	1,227
THE ROOKIE	CTV	1,188
9-1-1	Global	1,184
ELSBETH	Global	1,153
Law & Order Toronto: Criminal Intent	Citytv	1,131
THE GOOD DOCTOR	CTV	1,099
WILL TRENT	CTV	1,052
SURVIVOR	Global	1,039
CTV EVENING NEWS	CTV	1,037
NCIS	Global	1,016

ADULTS 25-54	Channel	AMA (000)
SURVIVOR	Global	373
9-1-1	Global	362
SATURDAY NIGHT LIVE	Global	313
THE ROOKIE	CTV	313
GREY'S ANATOMY	CTV	312
THE AMAZING RACE	CTV	308
THE MASKED SINGER	CTV	295
TRACKER	CTV	292
THE CONNERS	CTV	289
KITCHEN NIGHTMARES	CTV	286

ADULTS 18-34	Channel	AMA (000)
TRACKER	CTV	121
THE ROOKIE	CTV	131
9-1-1	Global	199
ELSBETH	Global	149
Law & Order Toronto: Criminal Intent	Citytv	133
THE GOOD DOCTOR	CTV	104
WILL TRENT	CTV	91
SURVIVOR	Global	167
CTV EVENING NEWS	CTV	91
NCIS	Global	99

Source: Numeris PPM, English Canada, Jan 1, 2024 – May 26, 2024, 3+ Airing, Conventional

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top 10 tv specials (English)

ADULTS 18+	Channel	AMA (000)
ACADEMY AWARDS	CTV	3,314
2024 The 66th Annual Grammy Awards	Citytv	1,751
Dick Clark's New Year's Rockin' Eve with Ryan Seacrest 2024 (11:30p)	Citytv	1,464
Golden Globe Awards	Citytv	1,419
Dick Clark's New Year's Rockin' Eve with Ryan Seacrest 2024 (10:30p)	Citytv	958
EMMY AWARDS	CTV2	837
M*A*S*H: The Comedy That Changed Television	Citytv	701
SUPER BOWL GREATEST COMMERCIALS XXIII: THE ULTIMATE COUNTDOW	Global	701
THE 100TH: BILLY JOEL AT MADISON SQUARE GARDEN – THE GREATES	Global	697
WILLIE NELSON'S 90TH BIRTHDAY CELEBRATION	Global	520

ADULTS 25-54	Channel	AMA (000)
ACADEMY AWARDS	CTV	1,248
Dick Clark's New Year's Rockin' Eve with Ryan Seacrest 2024 (11:30p)	Citytv	793
2024 The 66th Annual Grammy Awards	Citytv	557
Golden Globe Awards	Citytv	458
Dick Clark's New Year's Rockin' Eve with Ryan Seacrest 2024 (10:30p)	Citytv	443
EMMY AWARDS	CTV2	282
THE 100TH: BILLY JOEL AT MADISON SQUARE GARDEN – THE GREATES	Global	181
M*A*S*H: The Comedy That Changed Television	Citytv	166
Dick Clark's New Year's Rockin' Eve with Ryan Seacrest 2024 (8p – 10p)	Citytv	152
The Juno Awards (2024) - Live	CBC	128

ADULTS 18-34	Channel	AMA (000)
ACADEMY AWARDS	CTV	685
Dick Clark's New Year's Rockin' Eve with Ryan Seacrest 2024 (11:30p)	Citytv	388
Golden Globes	Citytv	335
The 66th Annual Grammy Awards	Citytv	318
Dick Clark's New Year's Rockin' Eve with Ryan Seacrest 2024 (10:30p)	Citytv	237
THE 100TH: BILLY JOEL AT MADISON SQUARE GARDEN – THE GREATES	Global	153
EMMY AWARDS	CTV2	126
SUPER BOWL GREATEST COMMERCIALS XXIII: THE ULTIMATE COUNTDOW	Global	106
CMA Awards	CTV2	81
Dick Clark's New Year's Rockin' Eve with Ryan Seacrest 2024 (8p – 10p)	Citytv	80

Source: Numeris PPM English Canada Jan 1, 2024 – May 26, 2024, A18+, A25-54, A18-34, non-sports

think tv

top 10 tv sports (English)

ADULTS 18+	Channel	AMA (000)
NFL SUPER BOWL	CTV + TSN	7,261
CFL GREY CUP	TSN+	2,587
NHL PLAYOFFS ROUND 1	Rogers Sports Network	1,723
HNIC PRIME EAST	Rogers Sports Network	1,492
ROGERS NHL ALL-STAR GAME	Rogers Sports Network	1,489
WJC:PRELIM CANADA	TSN+	1,135
NFL PLAYOFFS	CTV	951
HOCKEYCENTRAL	Rogers Sports Network	917
NHL HERITAGE CLASSIC	Sportsnet National+	907
HNIC PRIME WEST	Rogers Sports Network	833

ADULTS 25-54	Channel	AMA (000)
NFL SUPER BOWL	CTV + TSN	3,429
CFL GREY CUP	TSN+	1,003
NHL PLAYOFFS ROUND 1	Rogers Sports Network	720
HNIC PRIME EAST	Rogers Sports Network	582
ROGERS NHL ALL-STAR GAME	Rogers Sports Network	579
NFL PLAYOFFS	CTV	449
WJC:PRELIM CANADA	TSN+	424
NFL PLAYOFFS SUNDAY PRIME	TSN+	415
NHL HERITAGE CLASSIC	Sportsnet National+	373
HNIC PRIME WEST	Rogers Sports Network	350

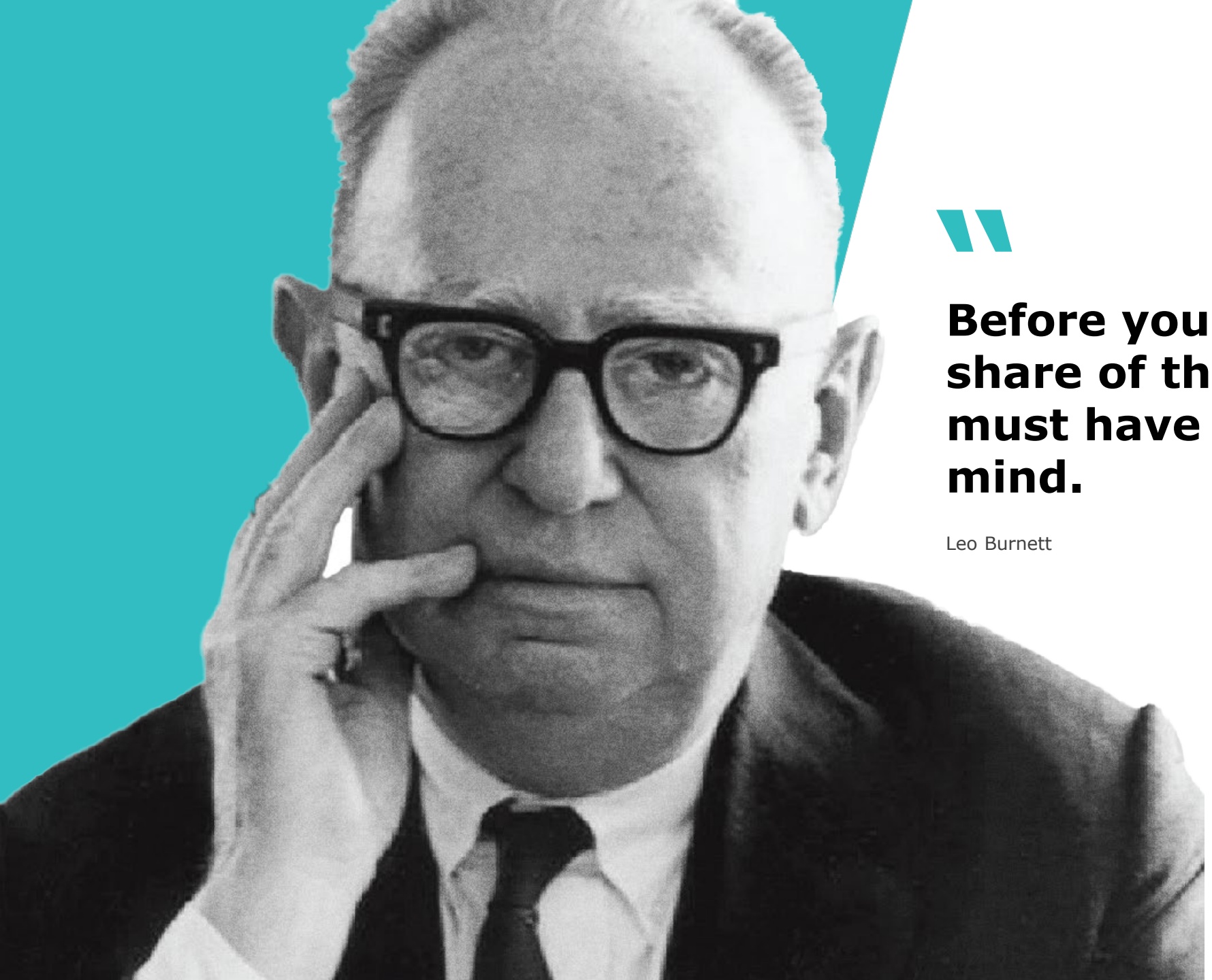
ADULTS 18-34	Channel	AMA (000)
NFL SUPER BOWL	CTV + TSN	1,638
CFL GREY CUP	TSN+	506
NHL PLAYOFFS ROUND 1	Rogers Sports Network	322
HNIC PRIME EAST	Rogers Sports Network	295
ROGERS NHL ALL-STAR GAME	Rogers Sports Network	279
WJC:PRELIM CANADA	TSN+	223
NFL PLAYOFFS SUNDAY PRIME	TSN+	198
NFL PLAYOFFS	CTV	192
NHL HERITAGE CLASSIC	Sportsnet National+	177
NFL CHRISTMAS AFT	CTV	162

Source: Numeris PPM English Canada, Jan 1, 2024 – May 26, 2024, Sports

think tv

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

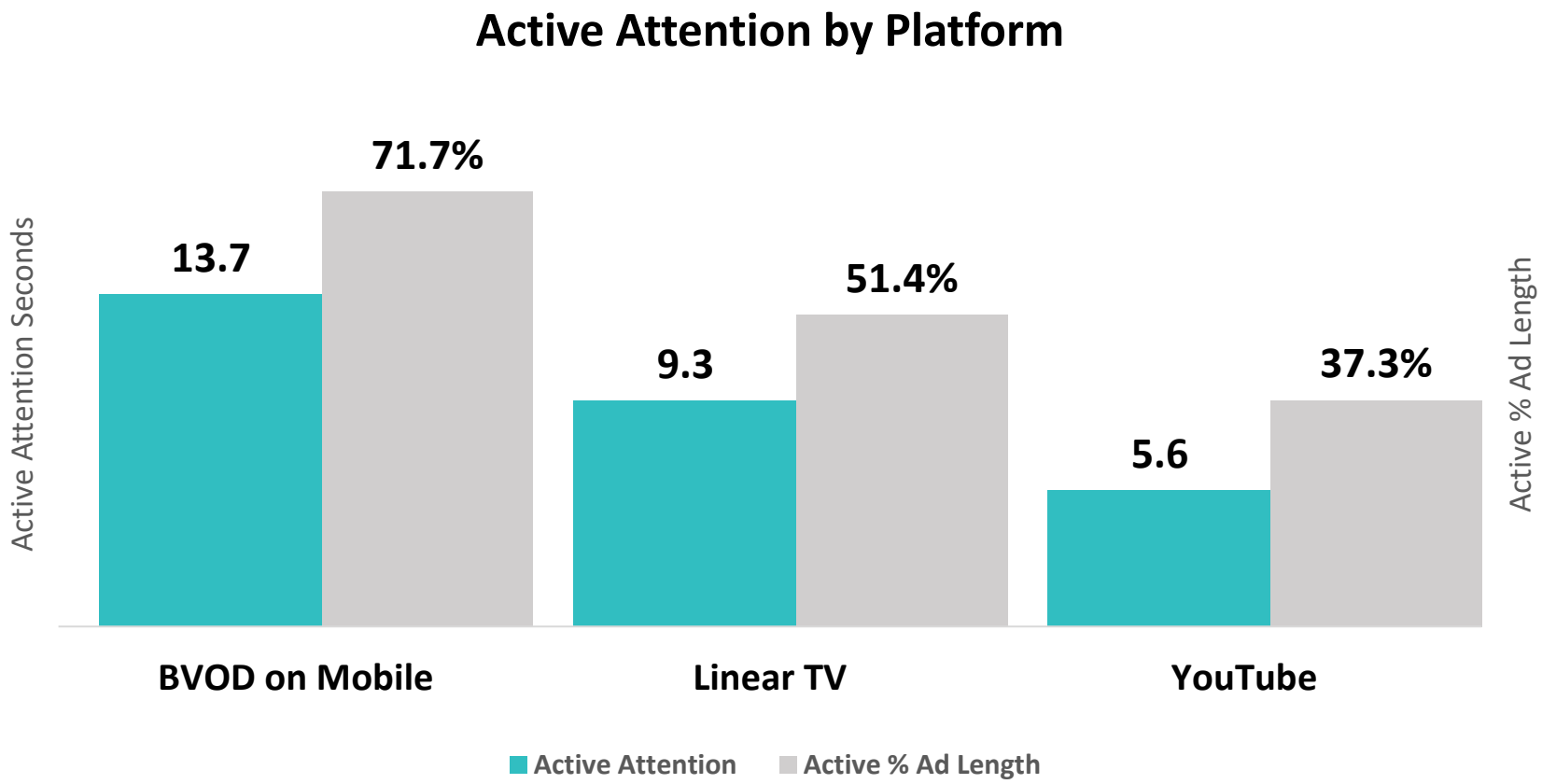
tv commands more attention

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

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

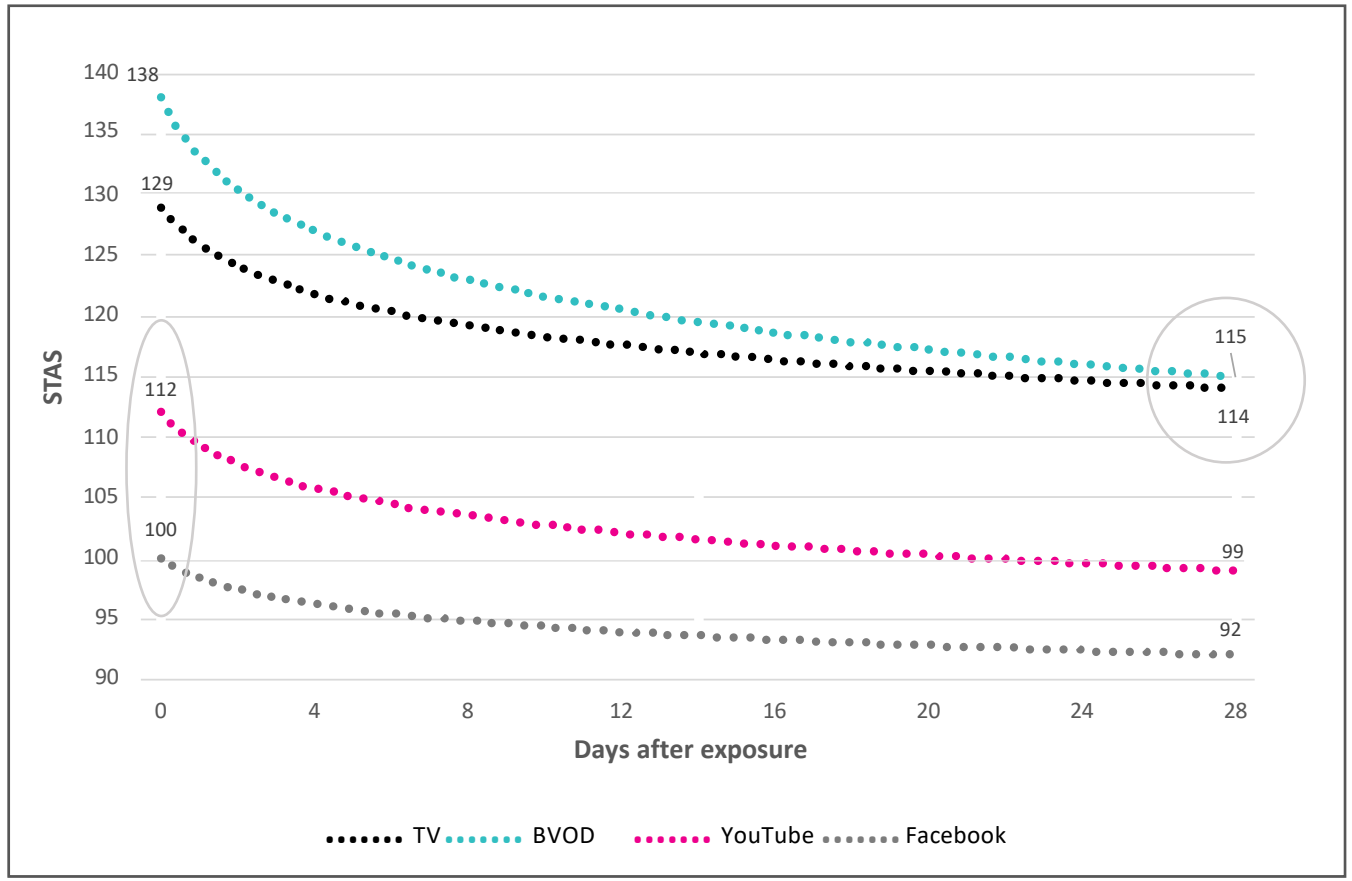
Karen Nelson-Field, *More Proof of the Value of Attention*, 2020

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



Source: VIA Belgium 2022, Phase One & Two collection – ad views only.

a tv ad impacts sales far longer than any other platform



*BVOD Modelled

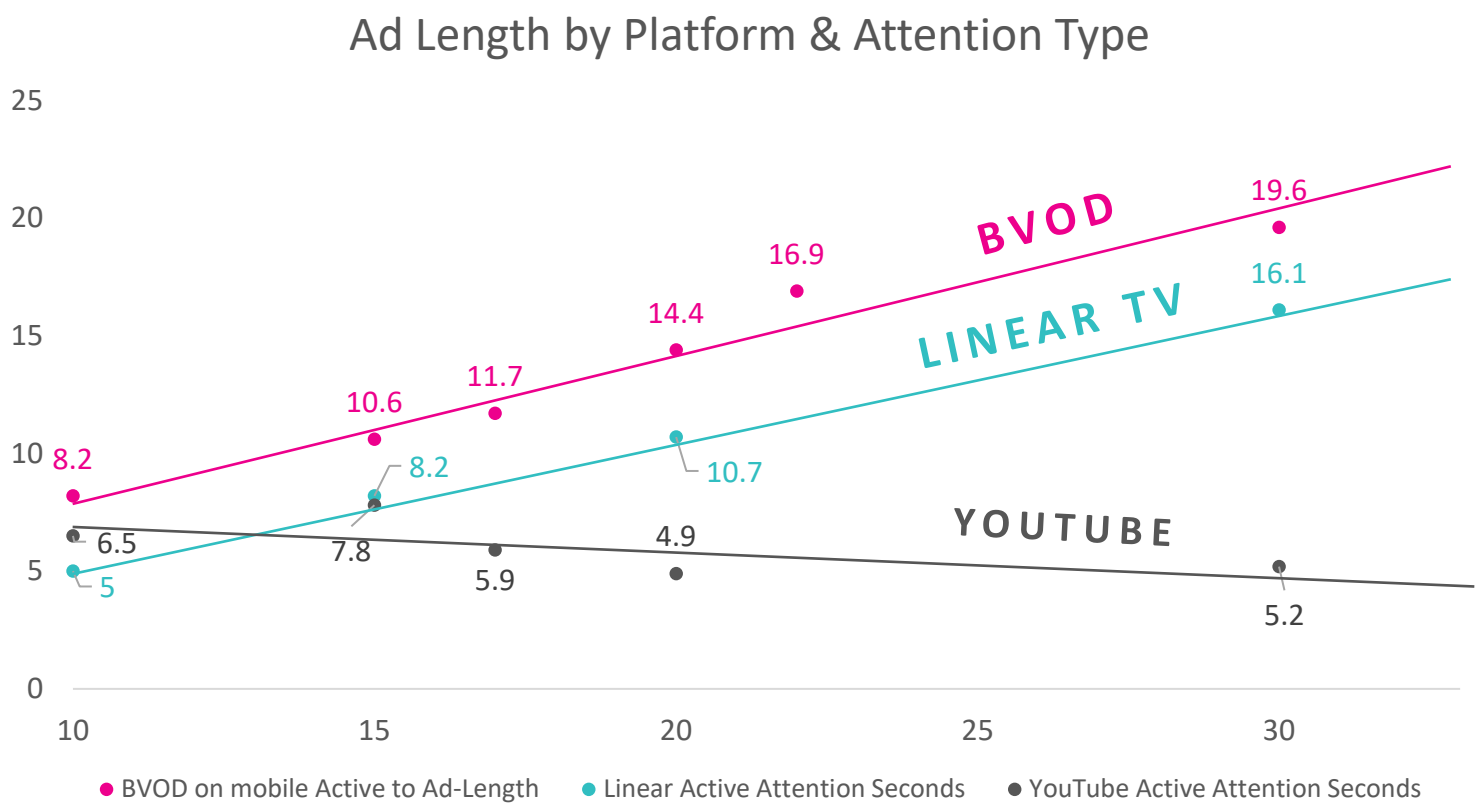
TV ad retention generates a greater impact at 28 days than either Facebook or YouTube do **immediately after exposure.**

Amplified Intelligence

Karen Nelson-Field, *More Proof of the Value of Attention*, 2020

think tv

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



TAKEAWAY:

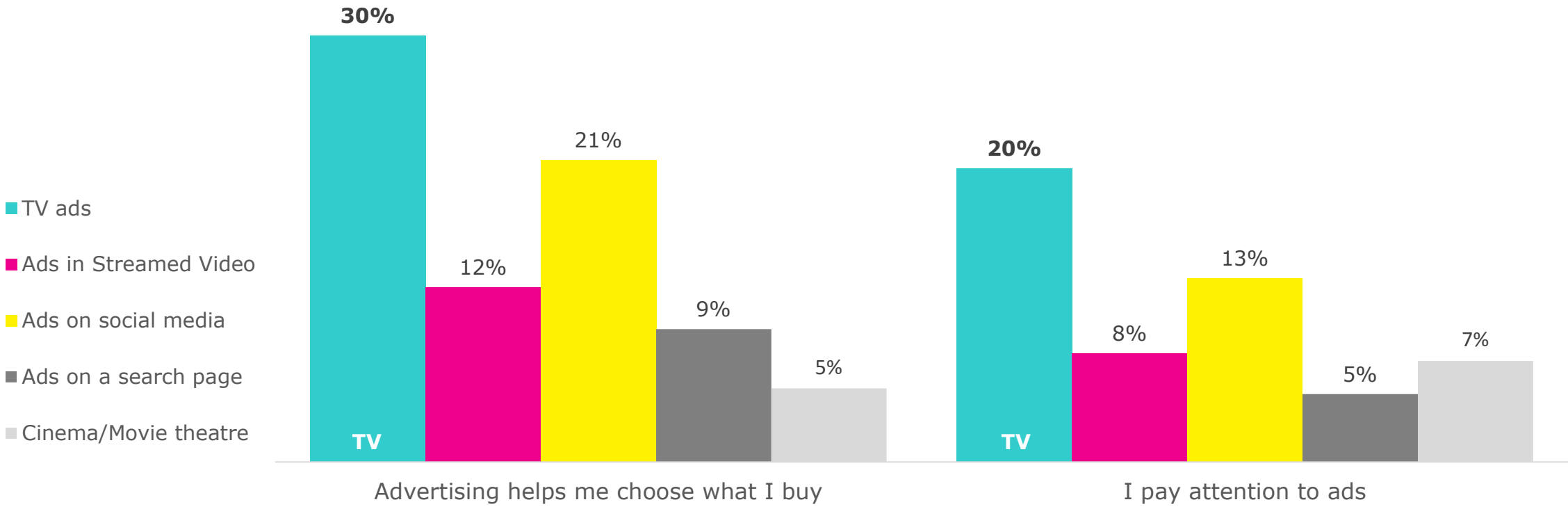
Longer ads on YouTube do not give you more Attention, **but on BVOD on mobile and Linear TV they do**

Amplified Intelligence

Source: VIA Belgium Phase One & Two Collection, n=7,802

think tv

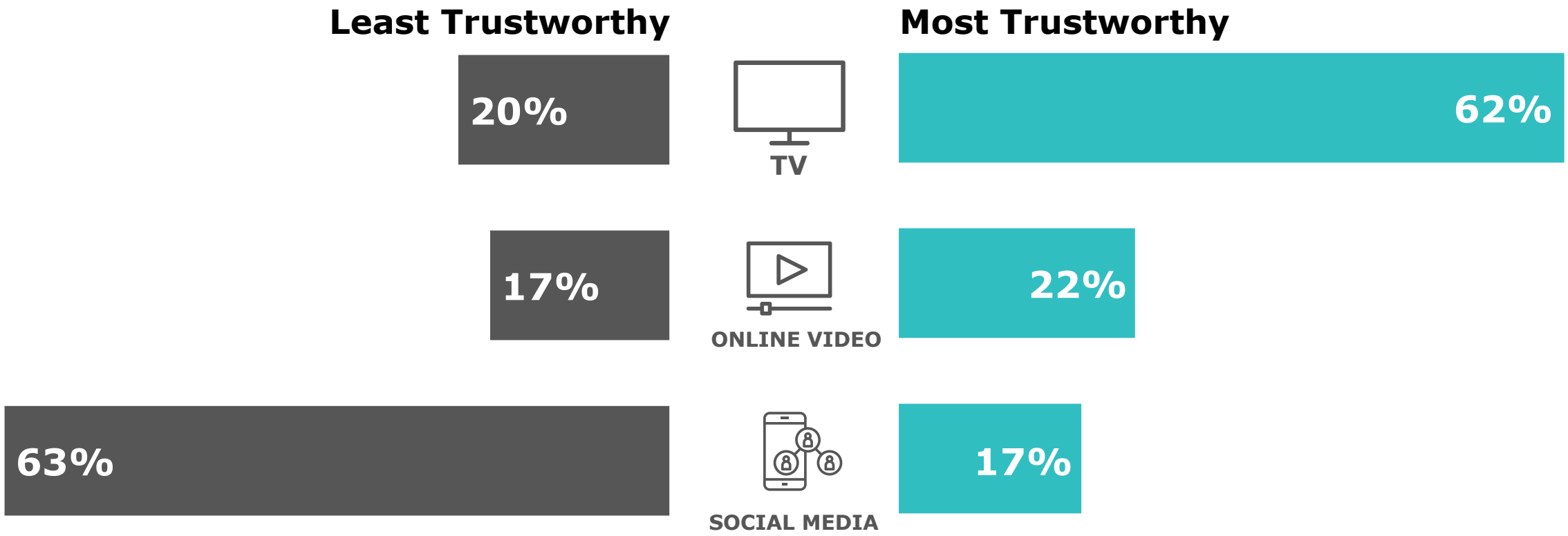
tv advertising is most likely to command attention and drive purchase decisions



Source: Vividata SCC | Study of the Canadian Consumer Spring 2024 | Adults 18+

tv is the most trusted medium

(while social media is the least trusted)

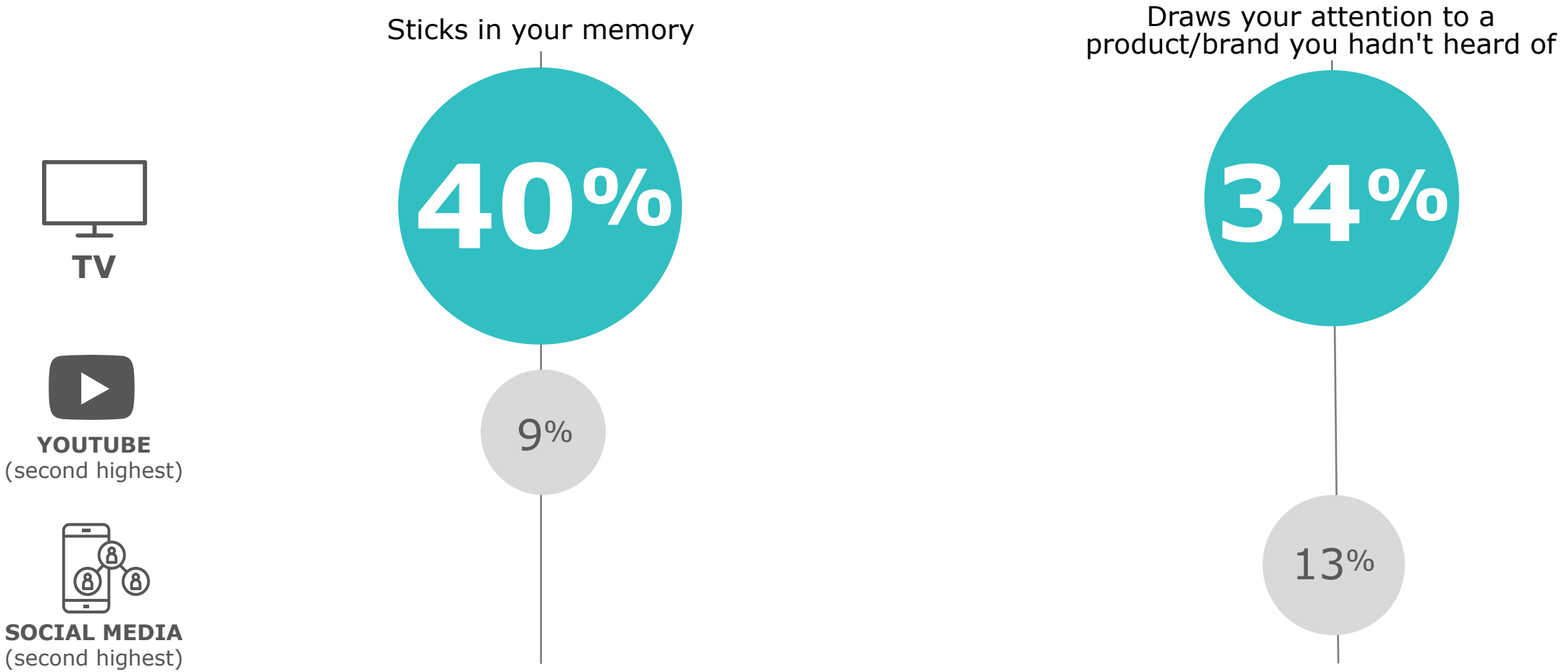


Which one of the following media carries video advertising that you believe to be most trustworthy? least trustworthy?

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

tv advertising has significant impact

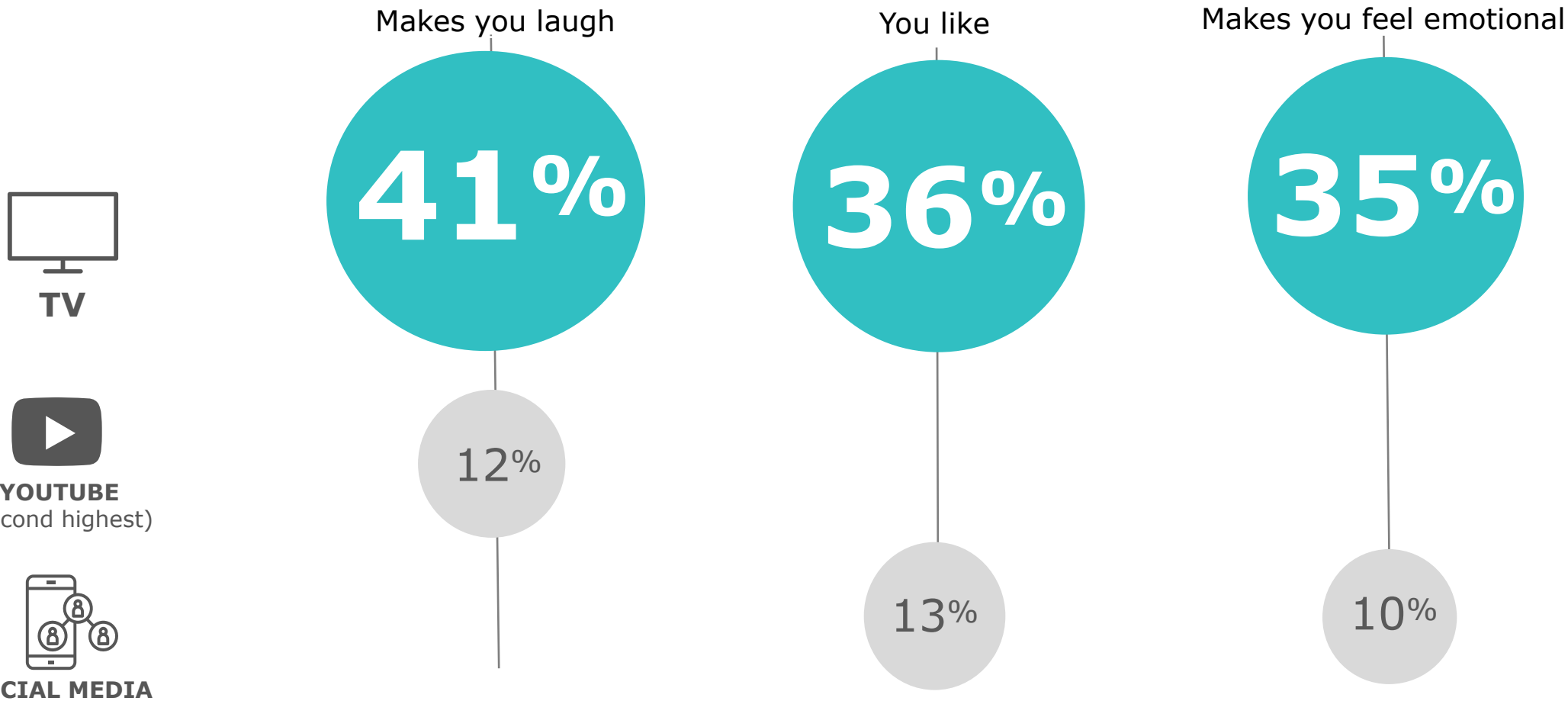
and is most likely to stick in your memory



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

Source: Ad Nation Canada, Ipsos, 2023

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

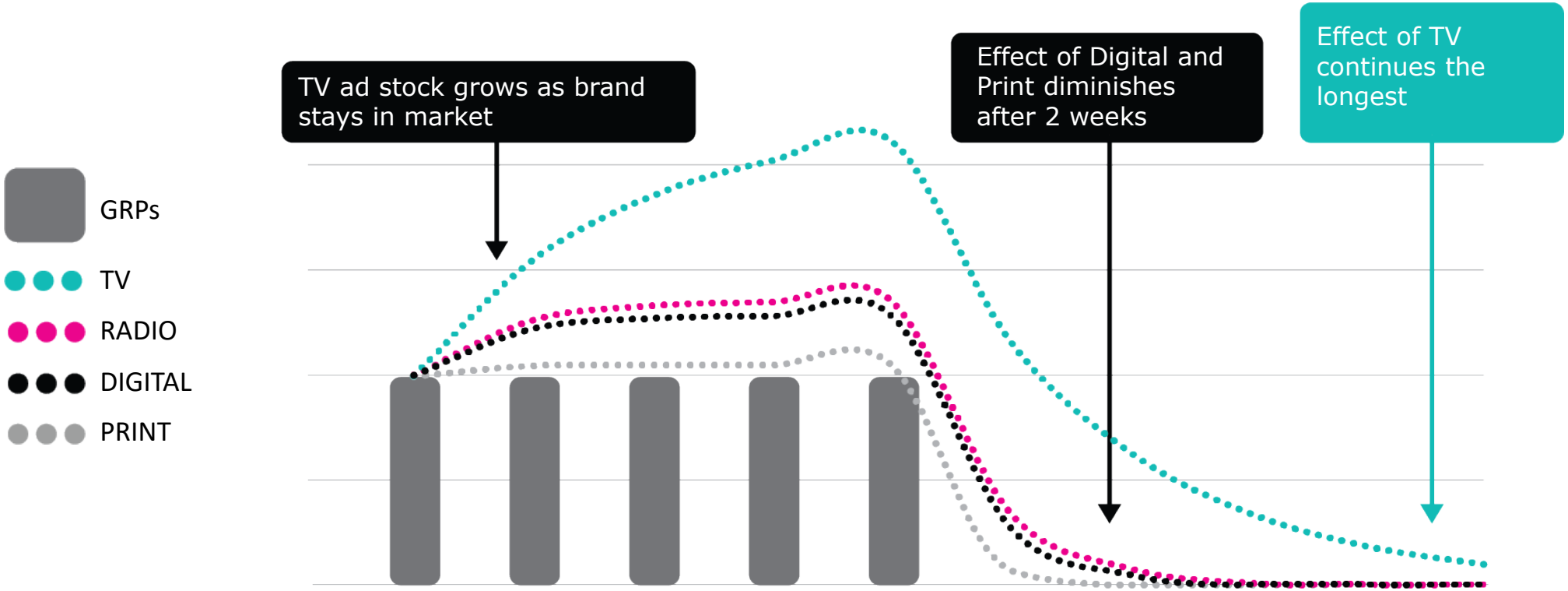


In which of the following media are you most likely to find advertising that…?

Source: Ad Nation Canada, Ipsos, 2023

tv ads deliver the biggest impact

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

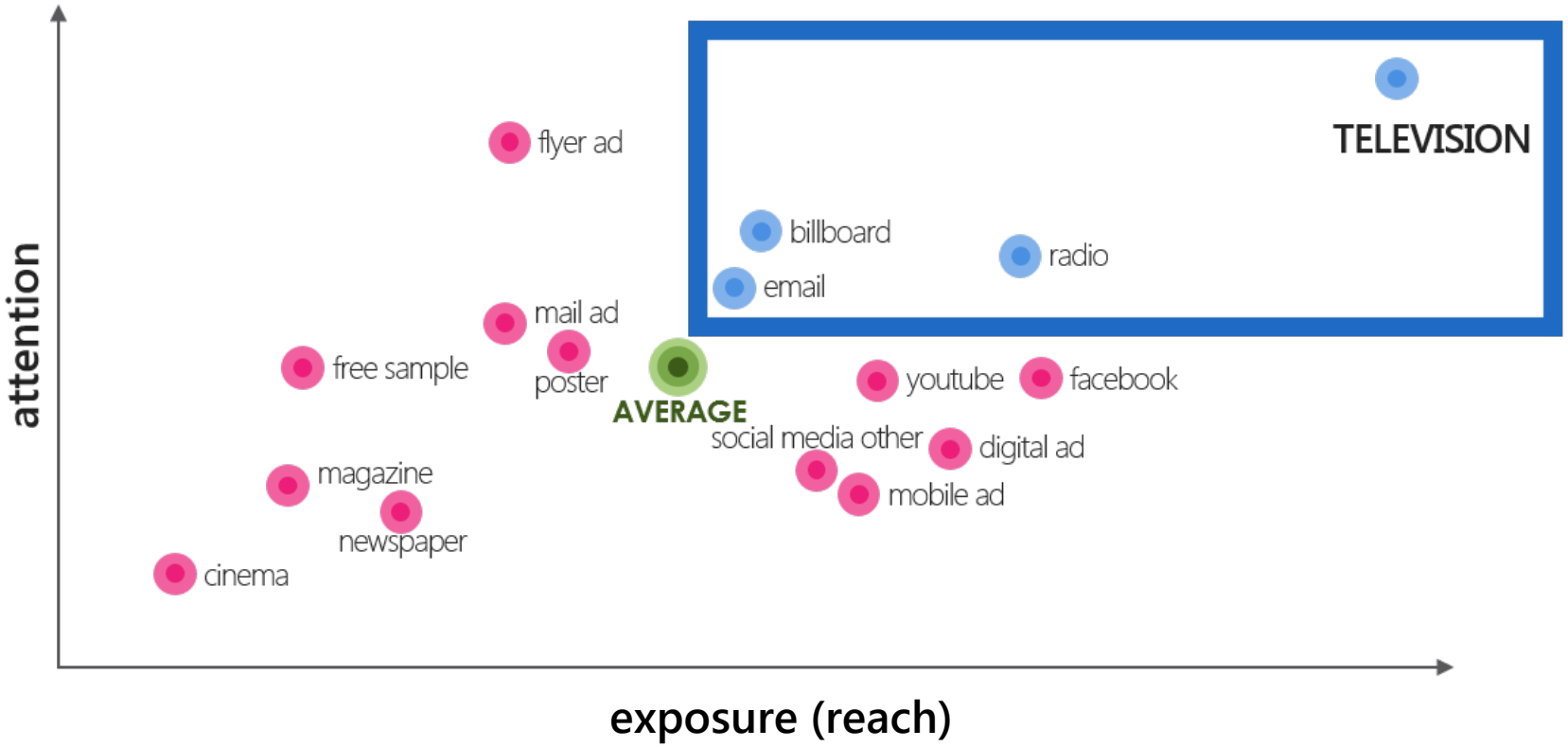


Source: GroupM; "Report: Target the (Whole) Market"

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**.



Source: Optimizing vs. Minimizing Media

demand

tv drives consumer action

tv works throughout the funnel

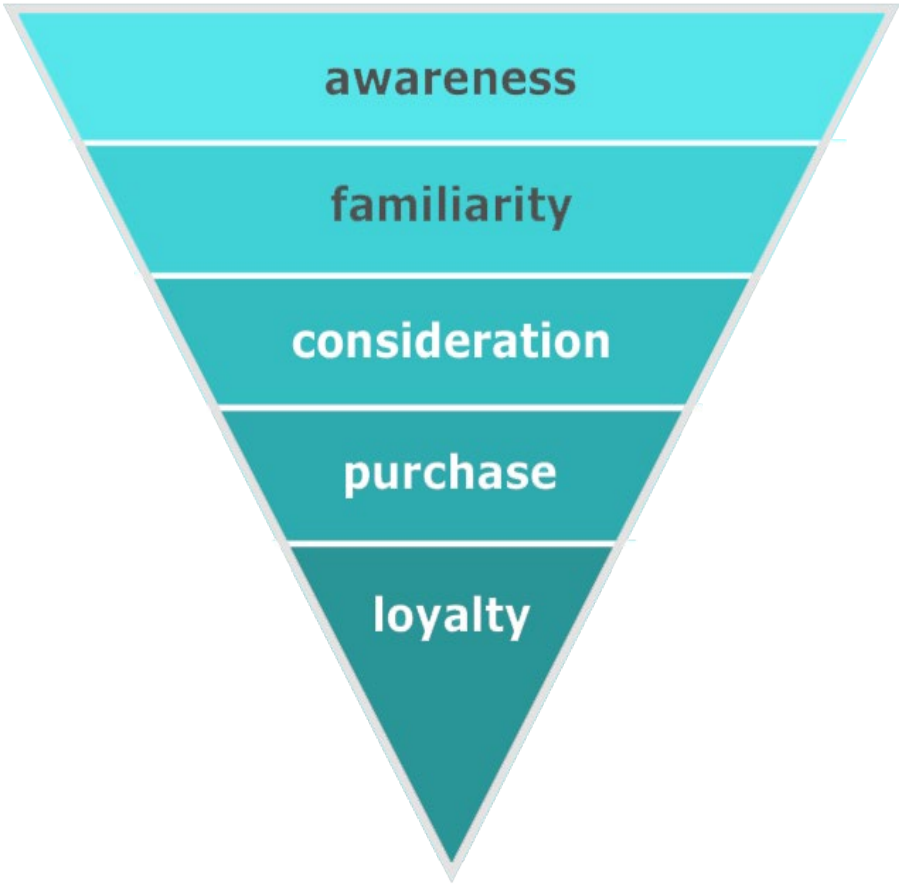
TV is your best store-front window

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



Source: https://www.millwardbrown.com/Insights/Point-of-View/How_Consumers_Buy_Brands_The_new_decision_journey/

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

Amplified Intelligence

Karen Nelson-Field, *More Proof of the Value of Attention*, 2020

think tv

tv drives the growth

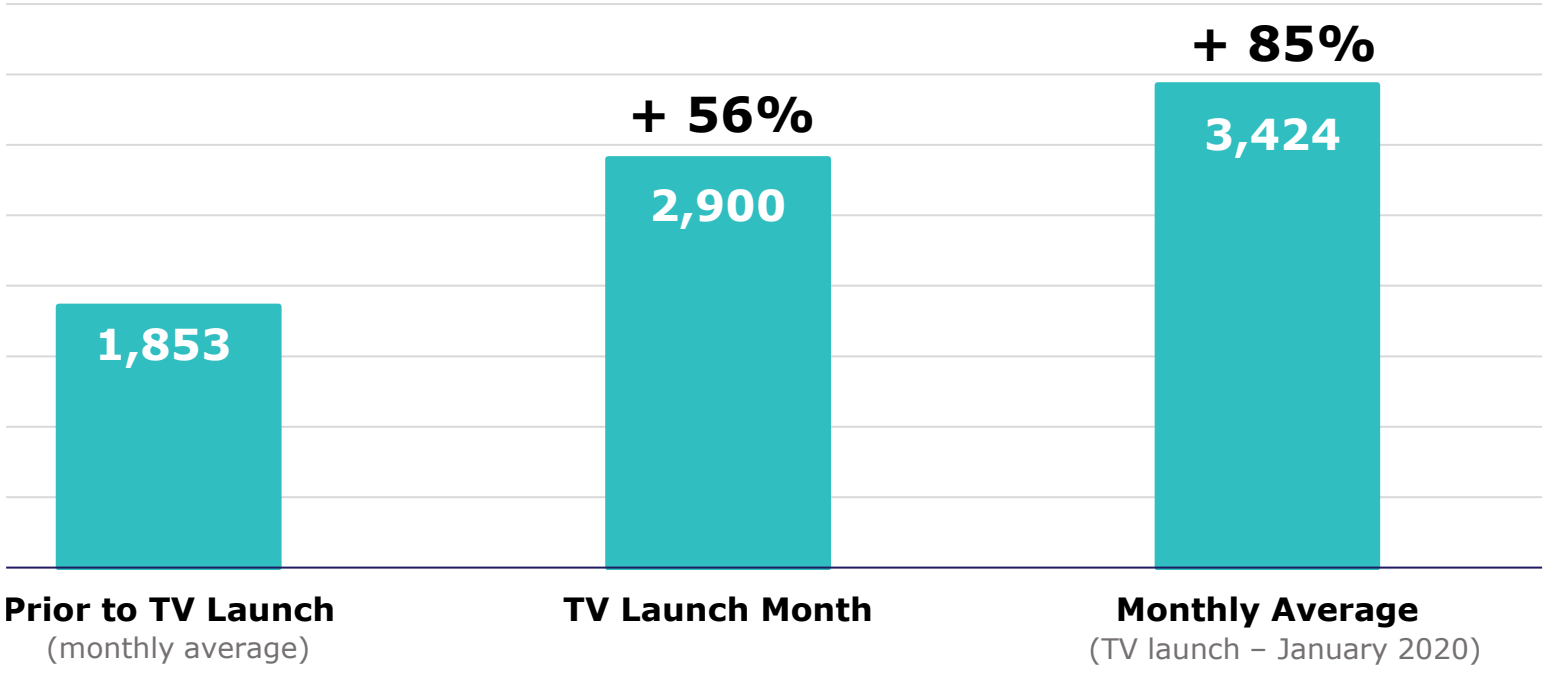
of both established and emerging companies

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.

36 'Emerging' DTC Brands*

Average Monthly Website Unique Visitors (000)

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. *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.

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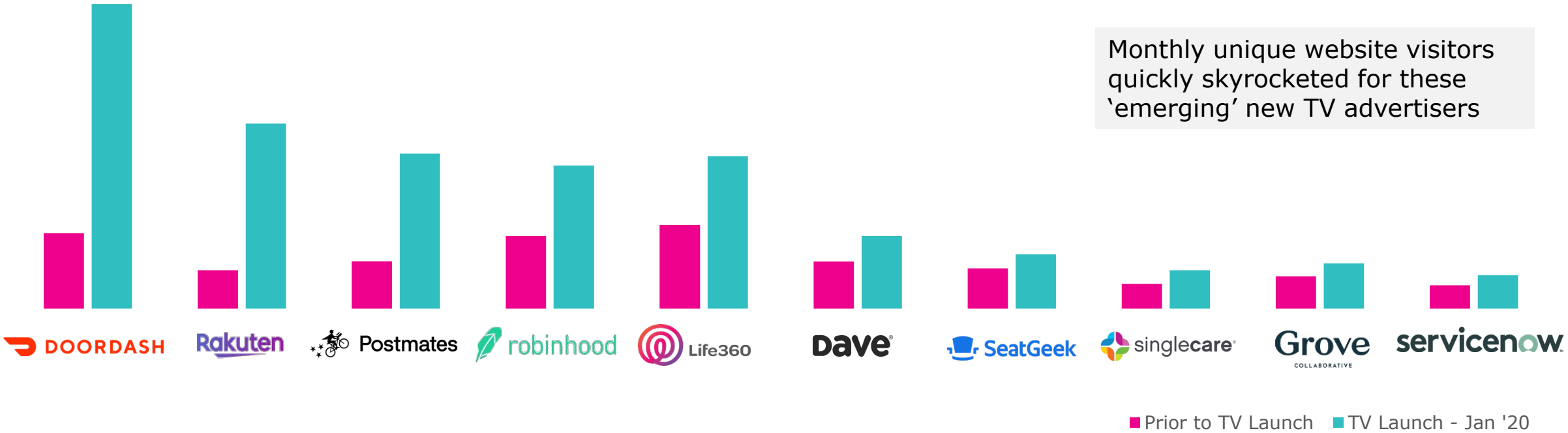
tv drives the growth

of both established and emerging companies

MONTHLY WEBSITE UNIQUE VISITORS (000) COMPARISON

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



Monthly unique website visitors quickly skyrocketed for these 'emerging' new TV advertisers

VAB analysis of Nielsen Ad Intel data, TV spend (national cable TV, national broadcast TV, Spanish language broadcast TV, Spa nish 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.

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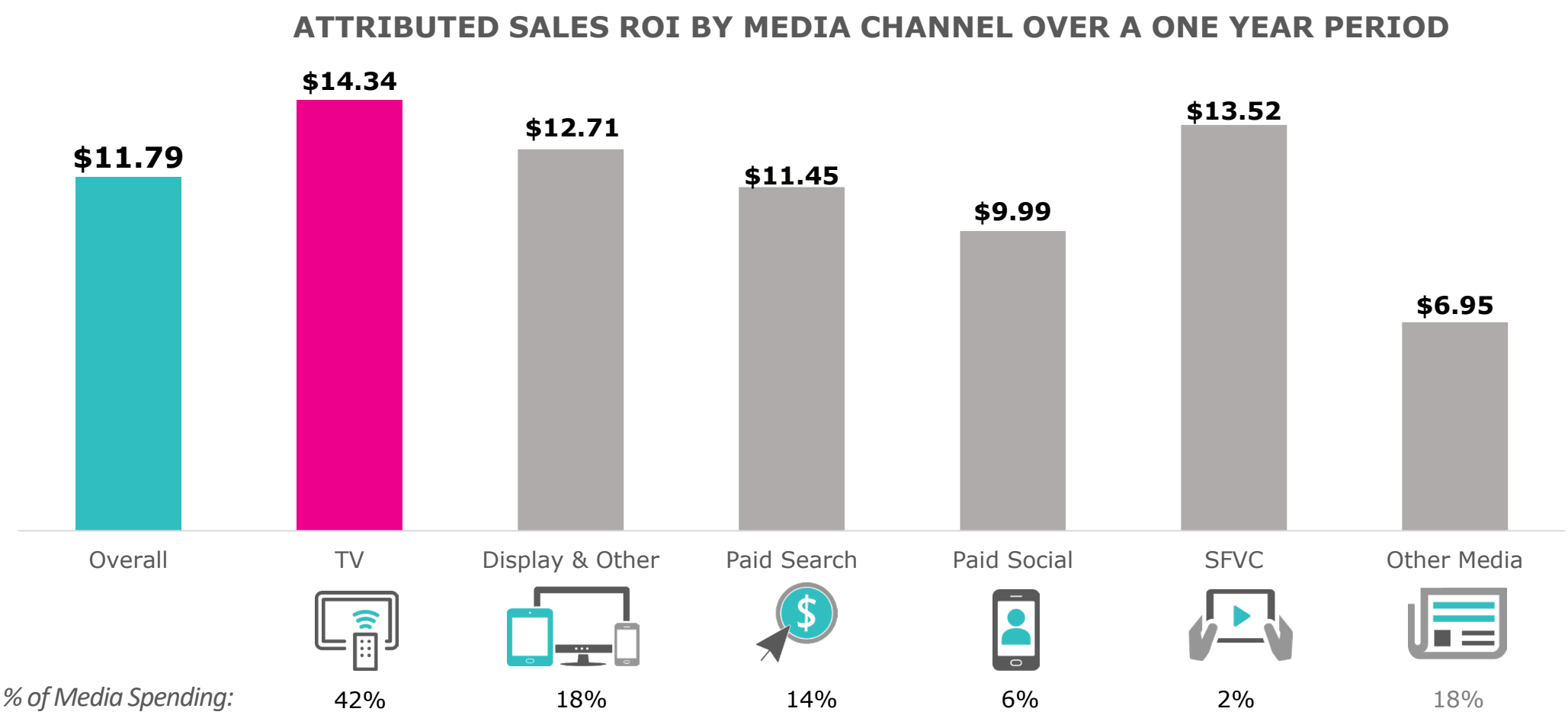
efficiency

tv delivers the highest ROI

tv delivers the best ROI

TV's ROI is $14.34 for every dollar spent



accenture Source: Canadian Media Attribution Study

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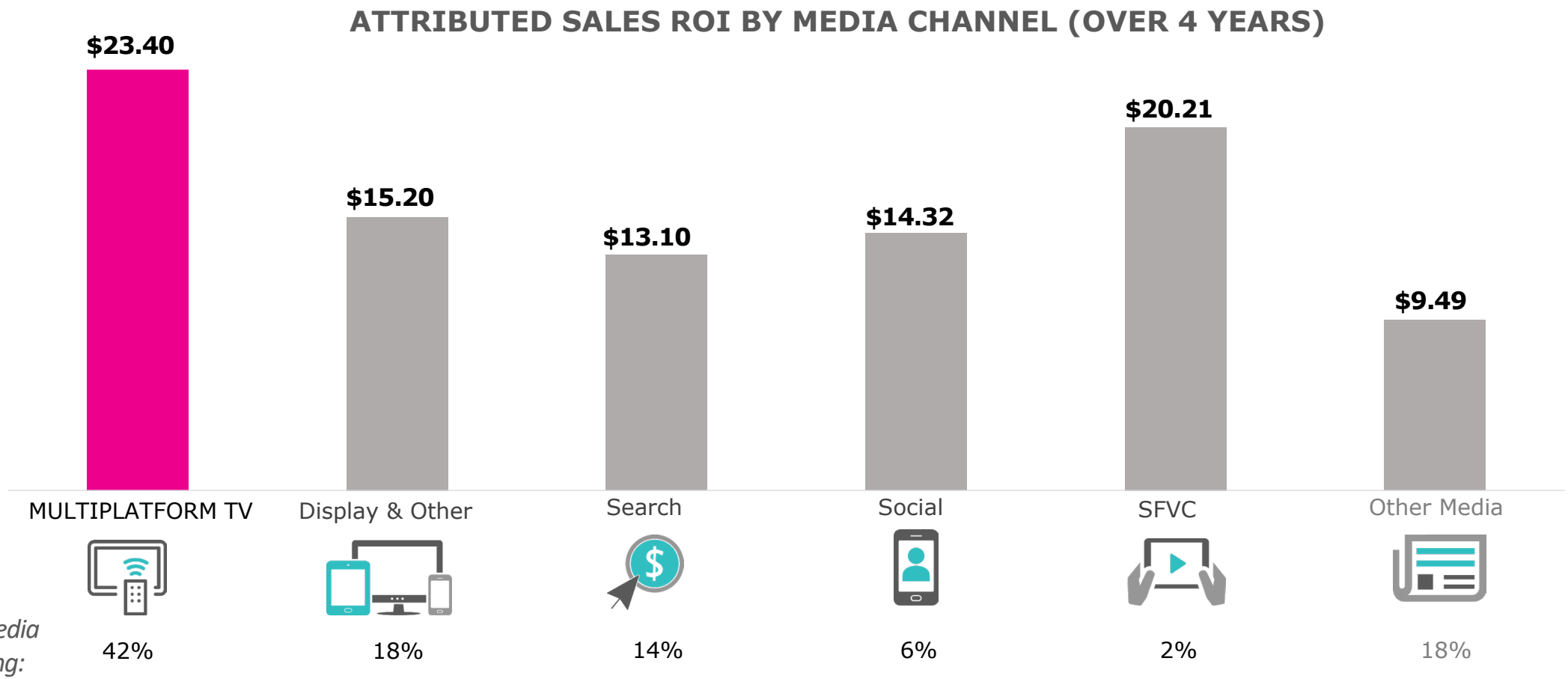
tv delivers the best ROI

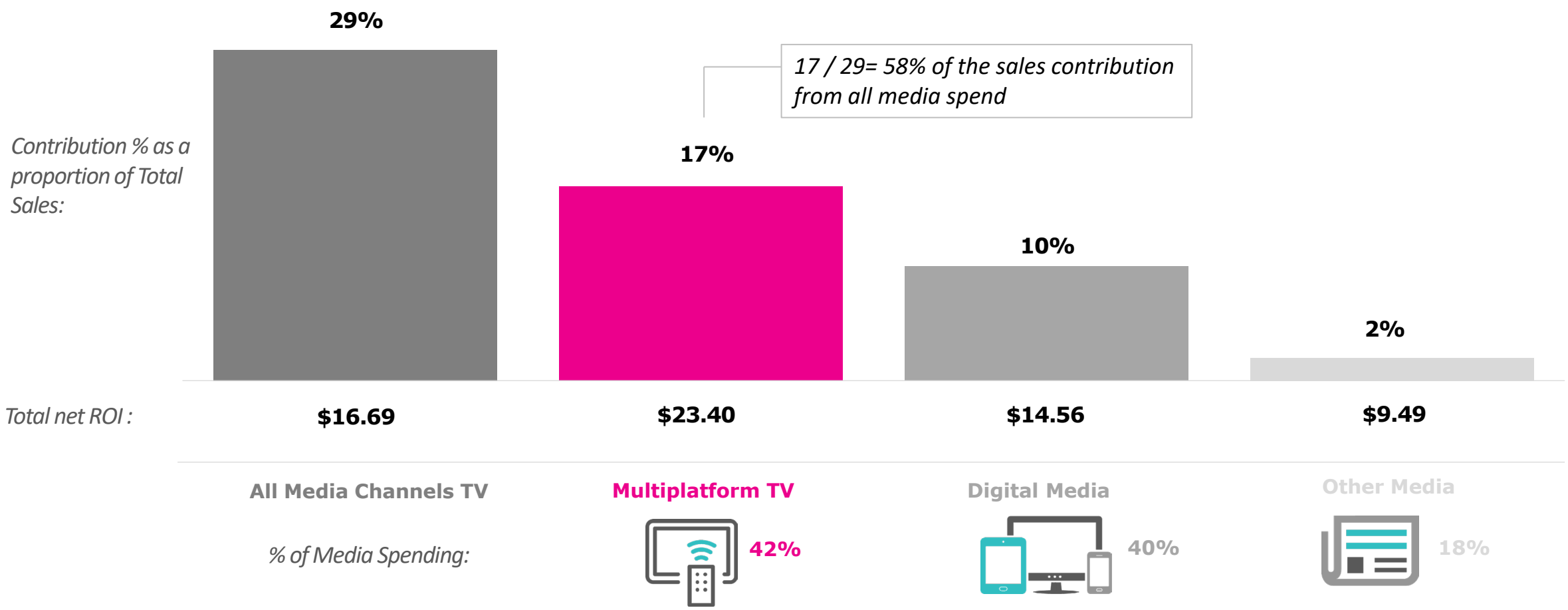
In the long term, TV's ROI grows to $23.40



accenture Source: Peak Performance: Driving Advertising Effectiveness That Lasts

accenture think tv

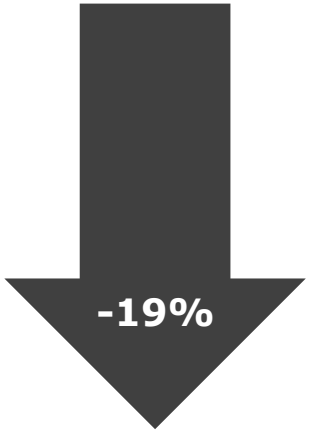
tv represents 42% of spend, but 58% of the sales



tv improves digital's performance

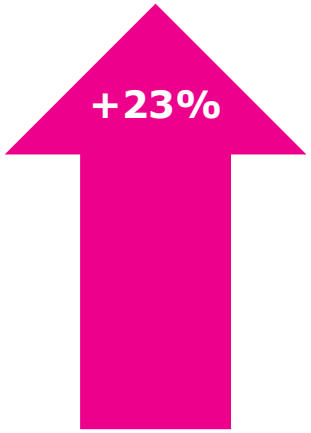
TV has a significant halo effect on digital media, increasing its sales ROI by 19%

Standalone Digital ROI



Without TV's halo effect, digital advertising's average ROI would decline by 19%.

TV's Adjusted ROI



accenture Source: Canadian Media Attribution Study

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

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summary

tv's key attributes

- 100% viewable
- Full screen
- Sound on
- Viewed by humans
- Robust measurement
- Brand safe
- Shared viewing
- 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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