

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%**



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

➤ reach ➤ demand

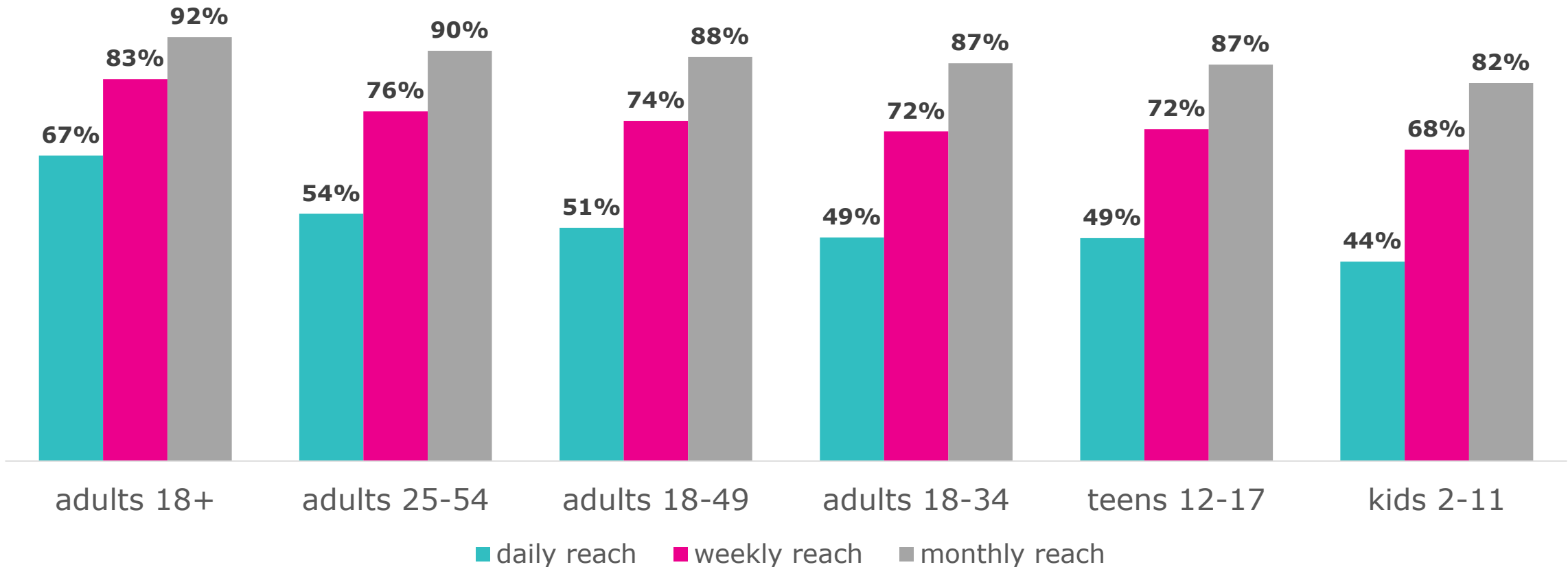
➤ impact ➤ efficiency

# reach

**tv's reach is vast & fast**



# tv reaches 92% of Canadians (18+) every month

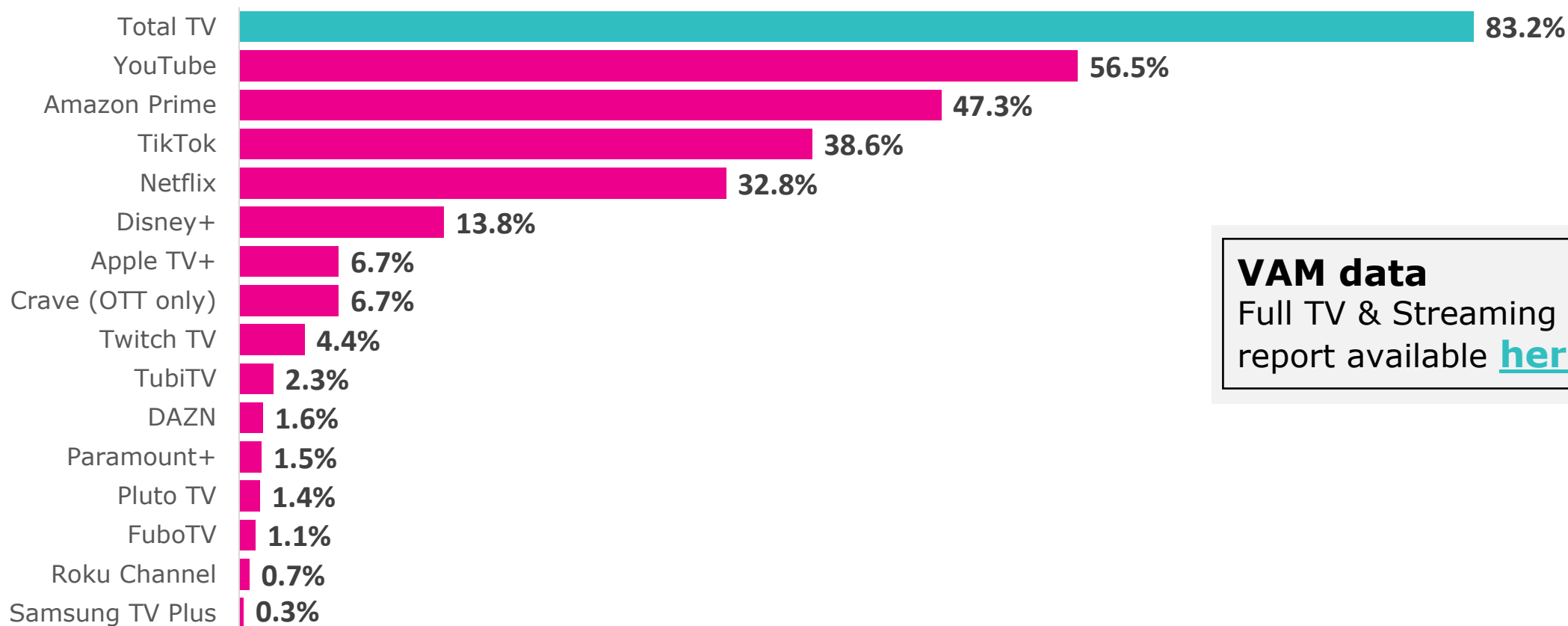


Source: Numeris PPM, Total Canada, Sep 18, 2023 – May 26, 2024

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.

# tv's reach far exceeds all streaming services

## AVERAGE WEEKLY REACH% ADULTS 18+ | Ontario



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





**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

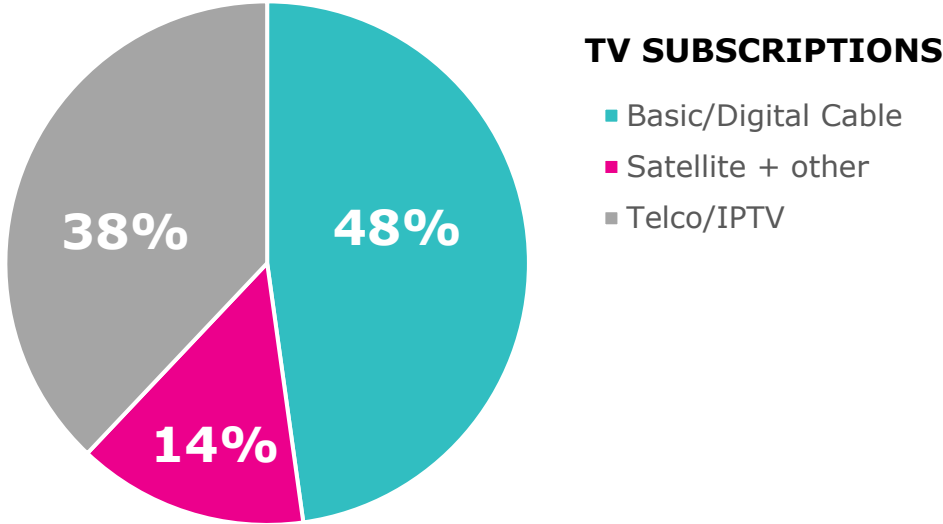
# 9.7 million paid **tv** subscriptions

**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)
<b>Total Paid Subs</b>	9,976,228	9,725,802	<b>(3%)</b>
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%

**2024**

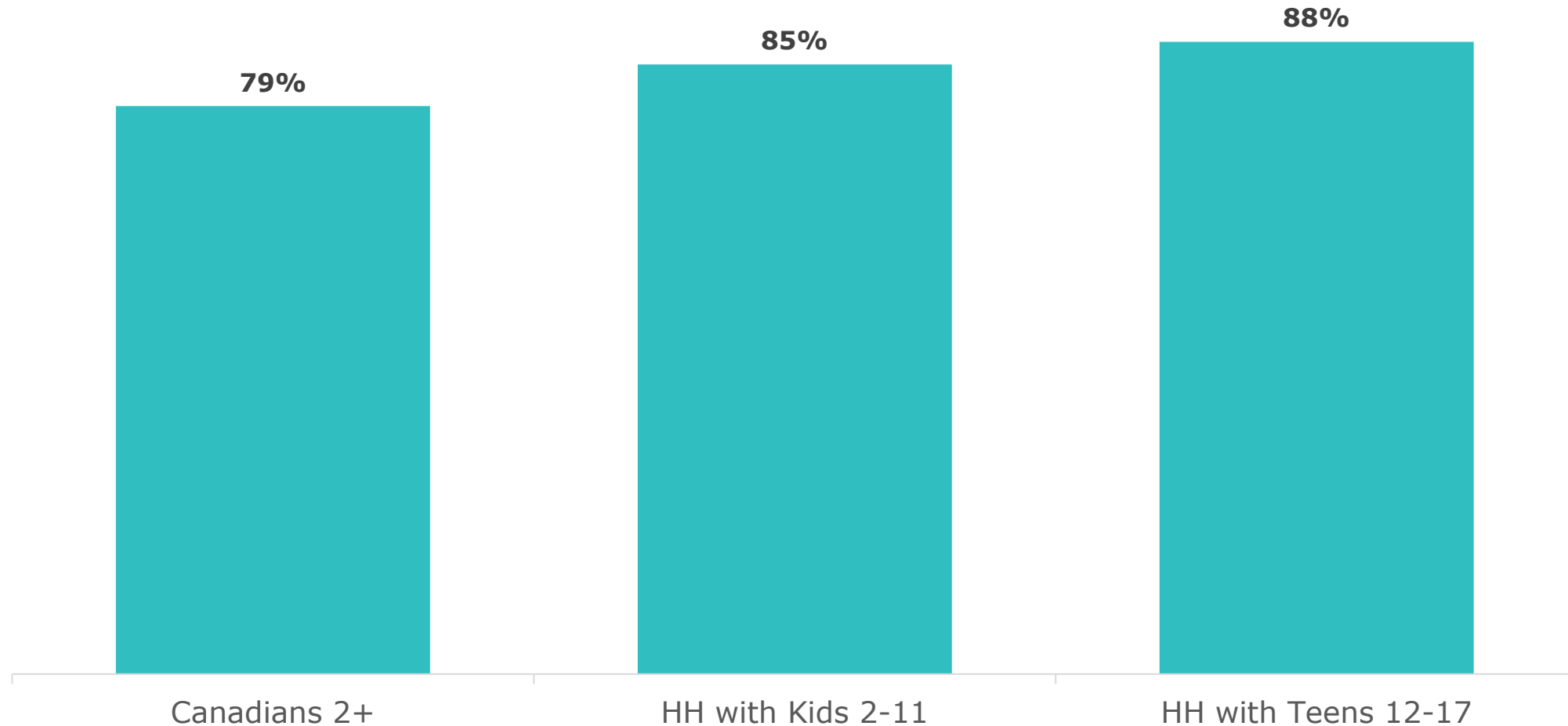


Source: Mediastats, BDU Profile Report, Total Canada Off-Air is not included. IPTV = Internet Protocol Television: the delivery of television content over Internet Protocol (IP) networks, e.g. Bell Fibe TV, Telus/Optik TV.



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

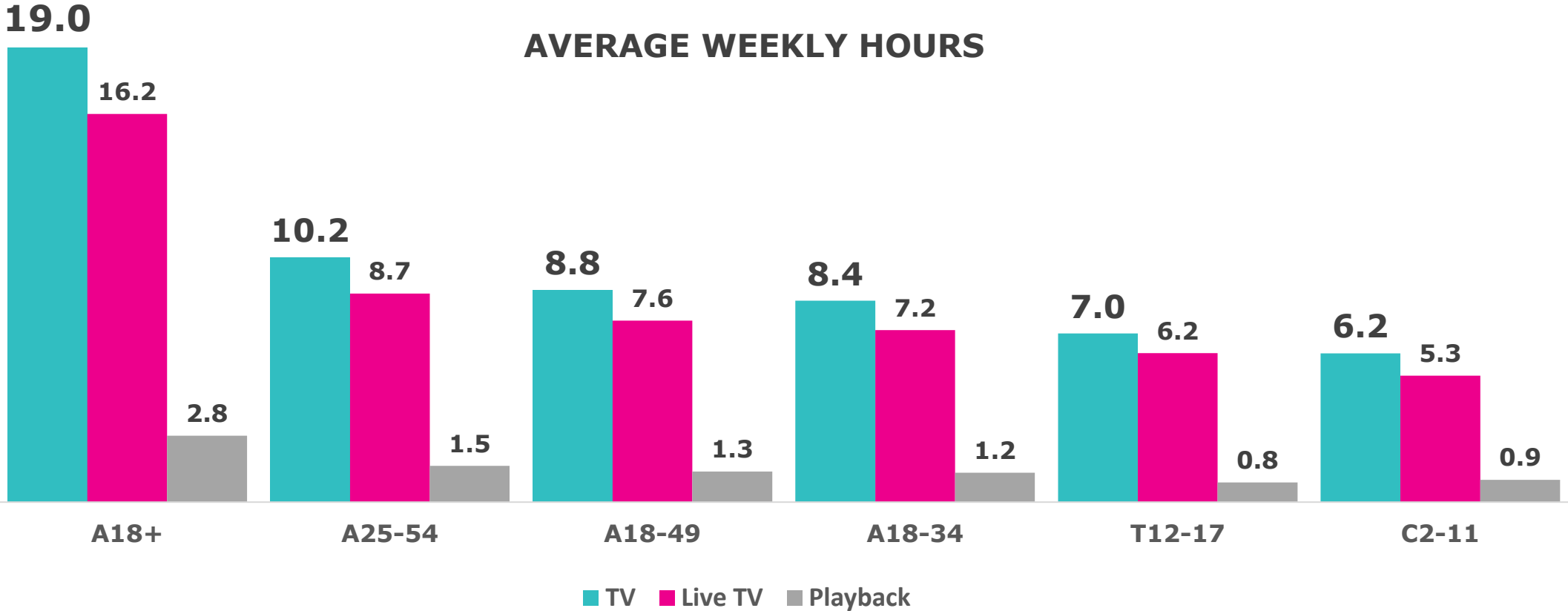
ownership goes up in households with children



# Canadians watch a lot of



and most of it is live

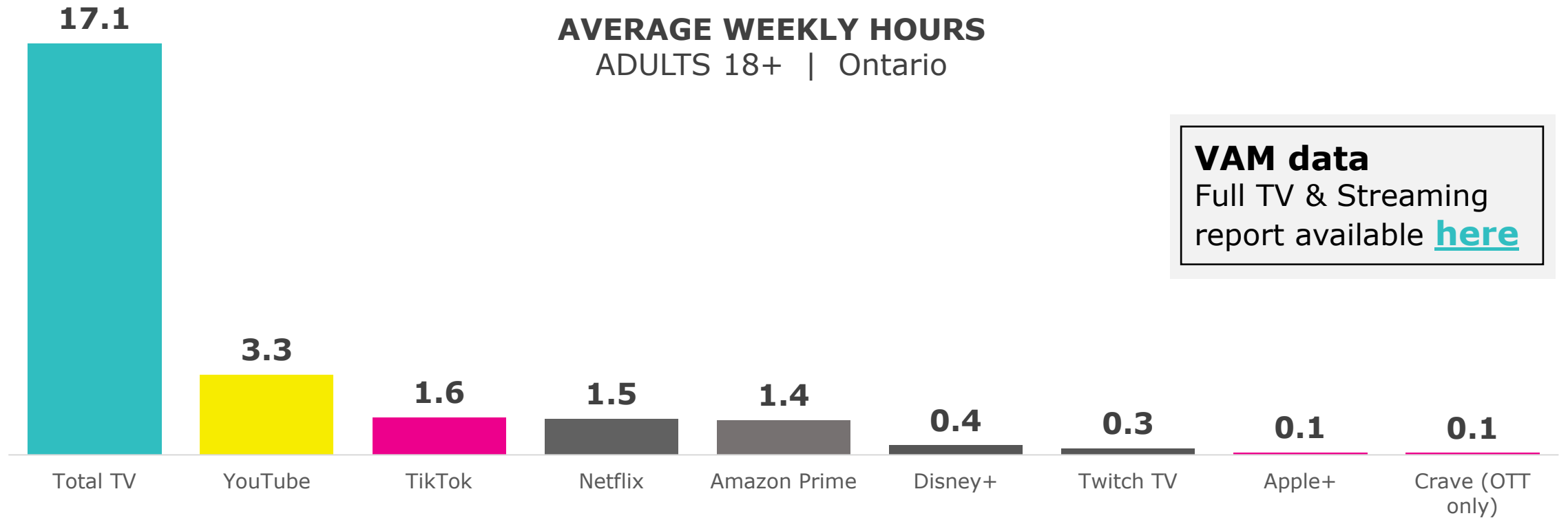


Source: Numeris, Total Canada, Sep 18, 2023 – May 26, 2024, Average Weekly Hours per Capita

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.

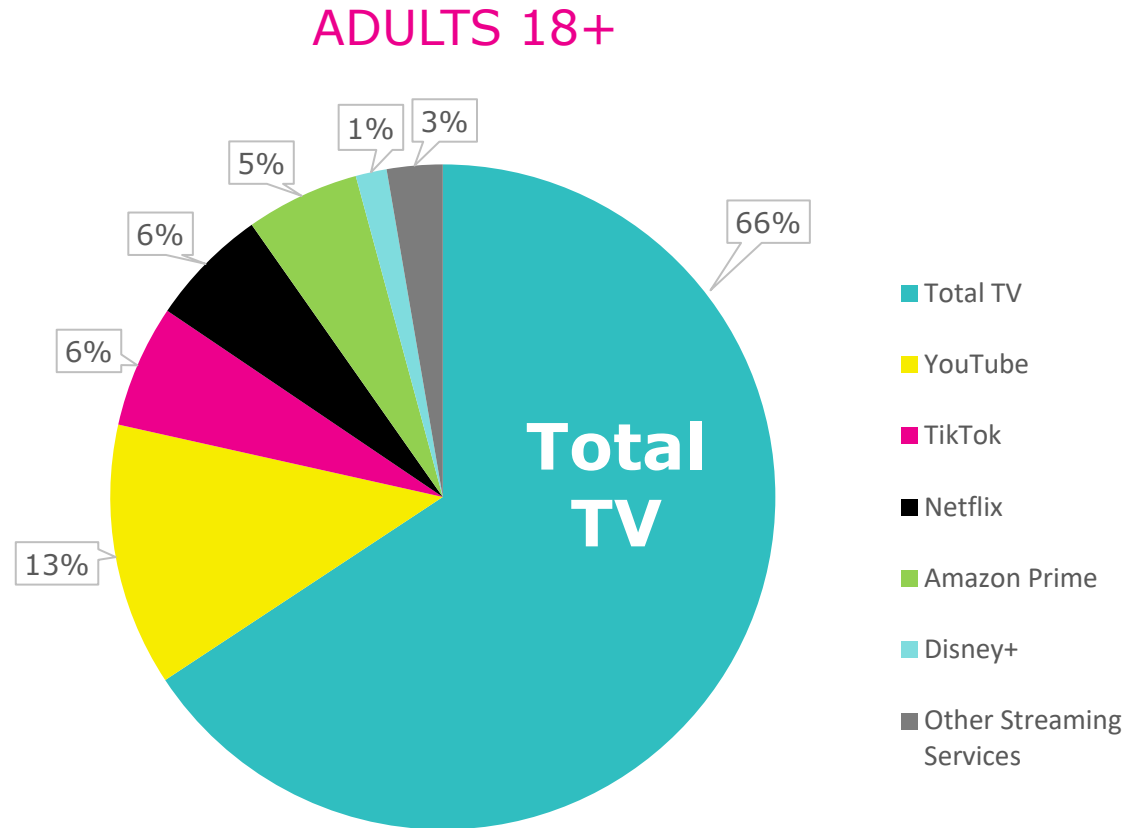
# Total TV dominates time spent with video





# Total TV dominates time spent with video

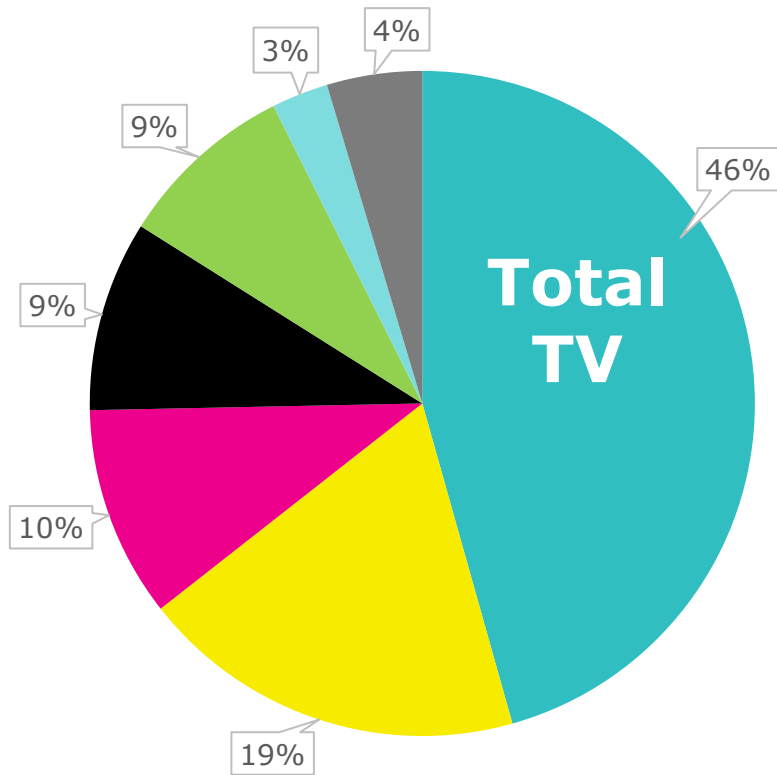
## SHARE OF VIDEO Ontario



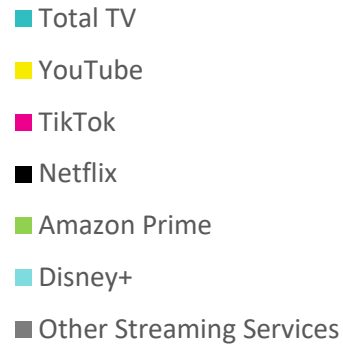
**VAM data**  
Full TV & Streaming  
report available [here](#)

# ...in all key demos

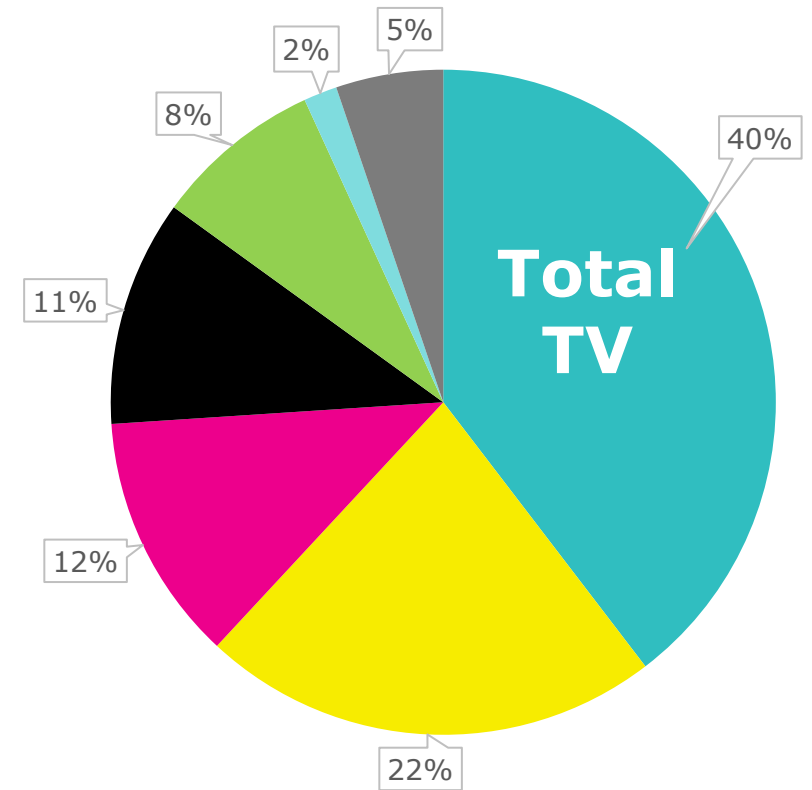
ADULTS 25-54



SHARE OF VIDEO  
Ontario

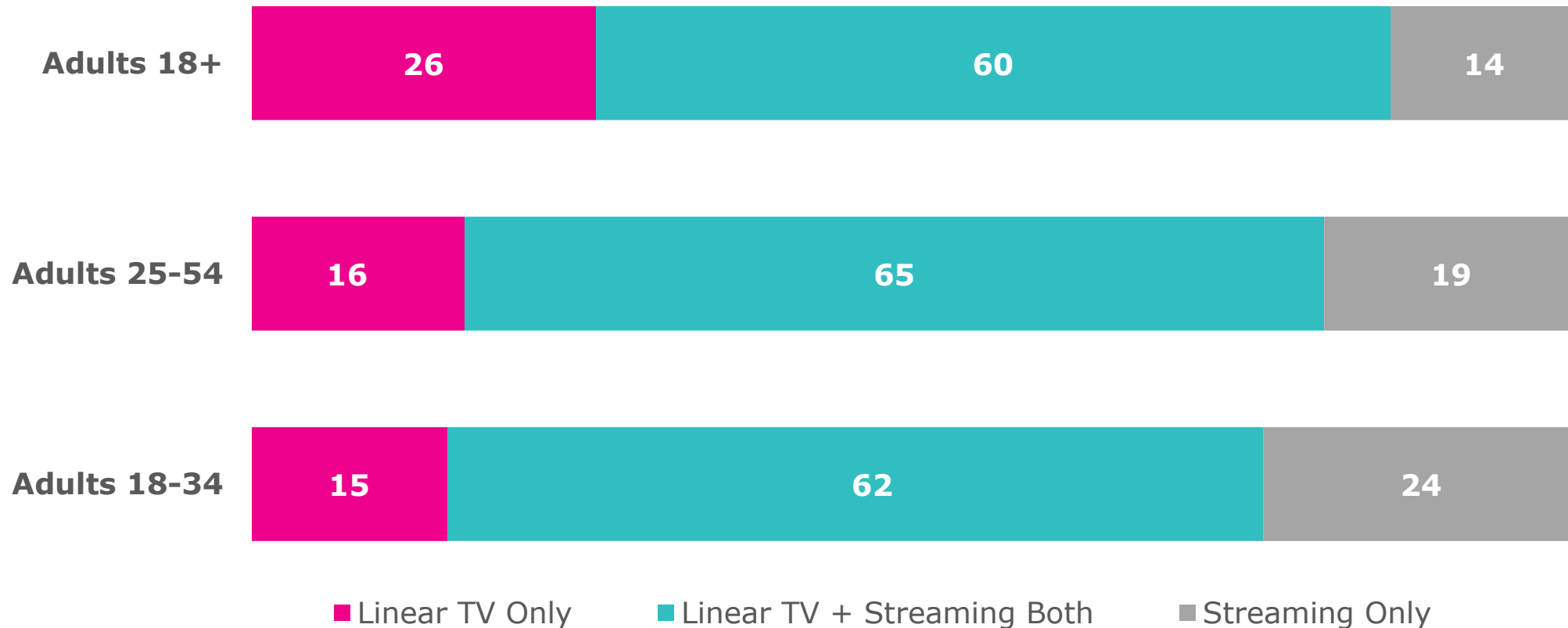


ADULTS 18-34



# majority of Canadians access both linear TV & streaming services

## DUPLICATED REACH%



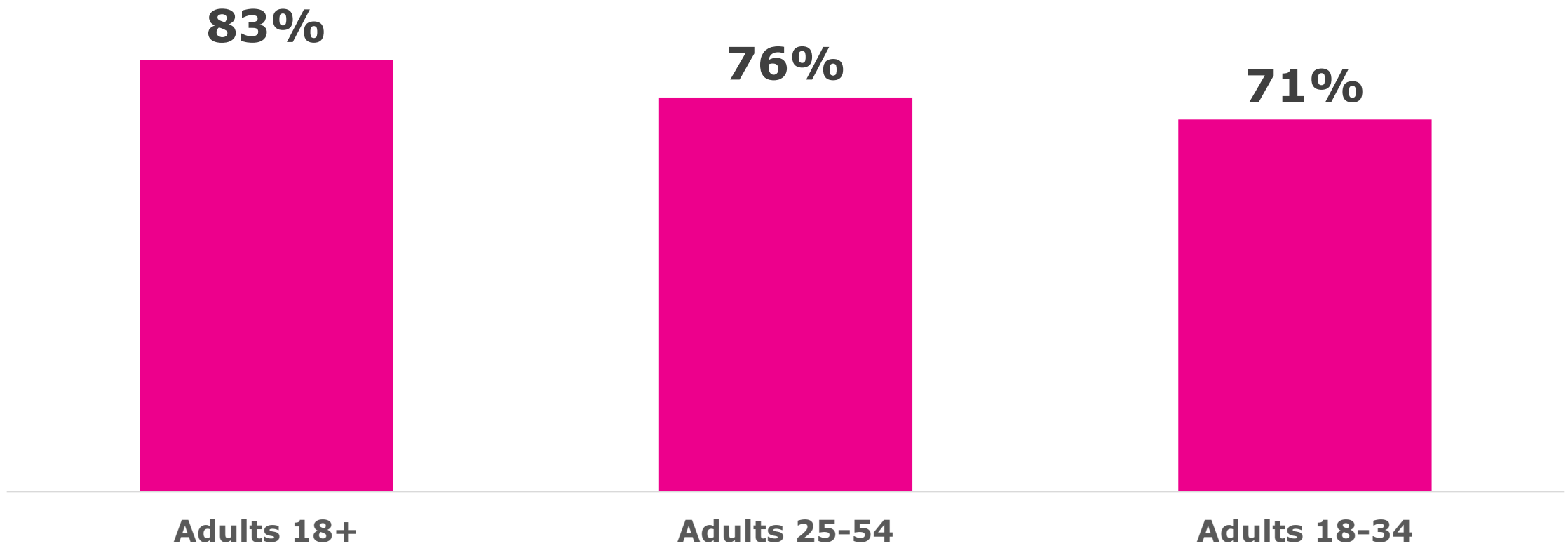
Source: Numeris VAM, Sep 18, 2023 – May 26, 2024, Ontario, % of composition of average weekly reach

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

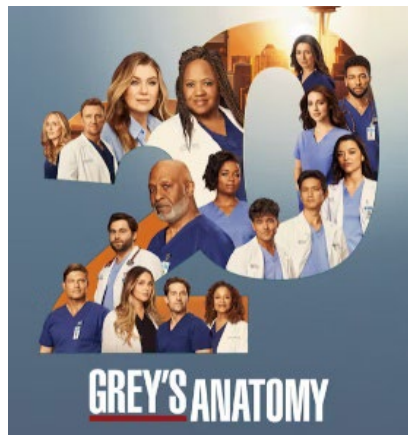
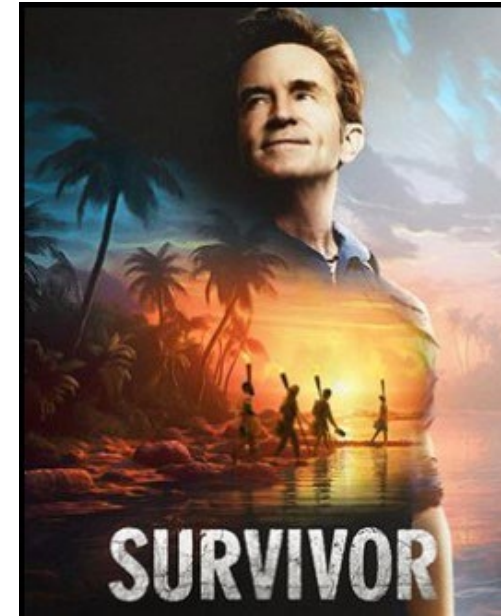
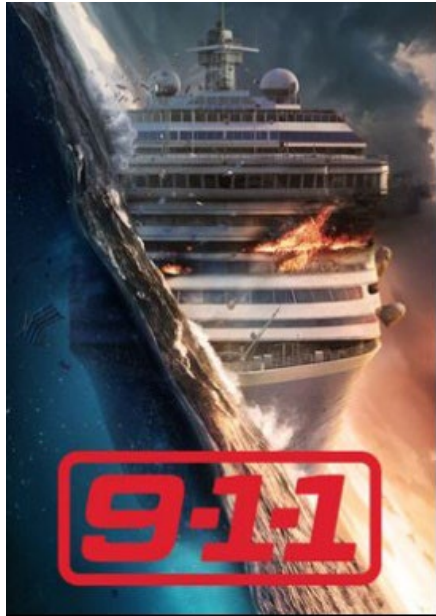


# LIVE **tv** reaches **83%** of Canadians each week

## WEEKLY REACH



# what are they watching?



# top 10 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



# 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 COUNTDOWN	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 COUNTDOWN	Global	106
CMA Awards	CTV2	81
Dick Clark's New Year's Rockin' Eve with Ryan Seacrest 2024 (8p – 10p)	Citytv	80

# top 10 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

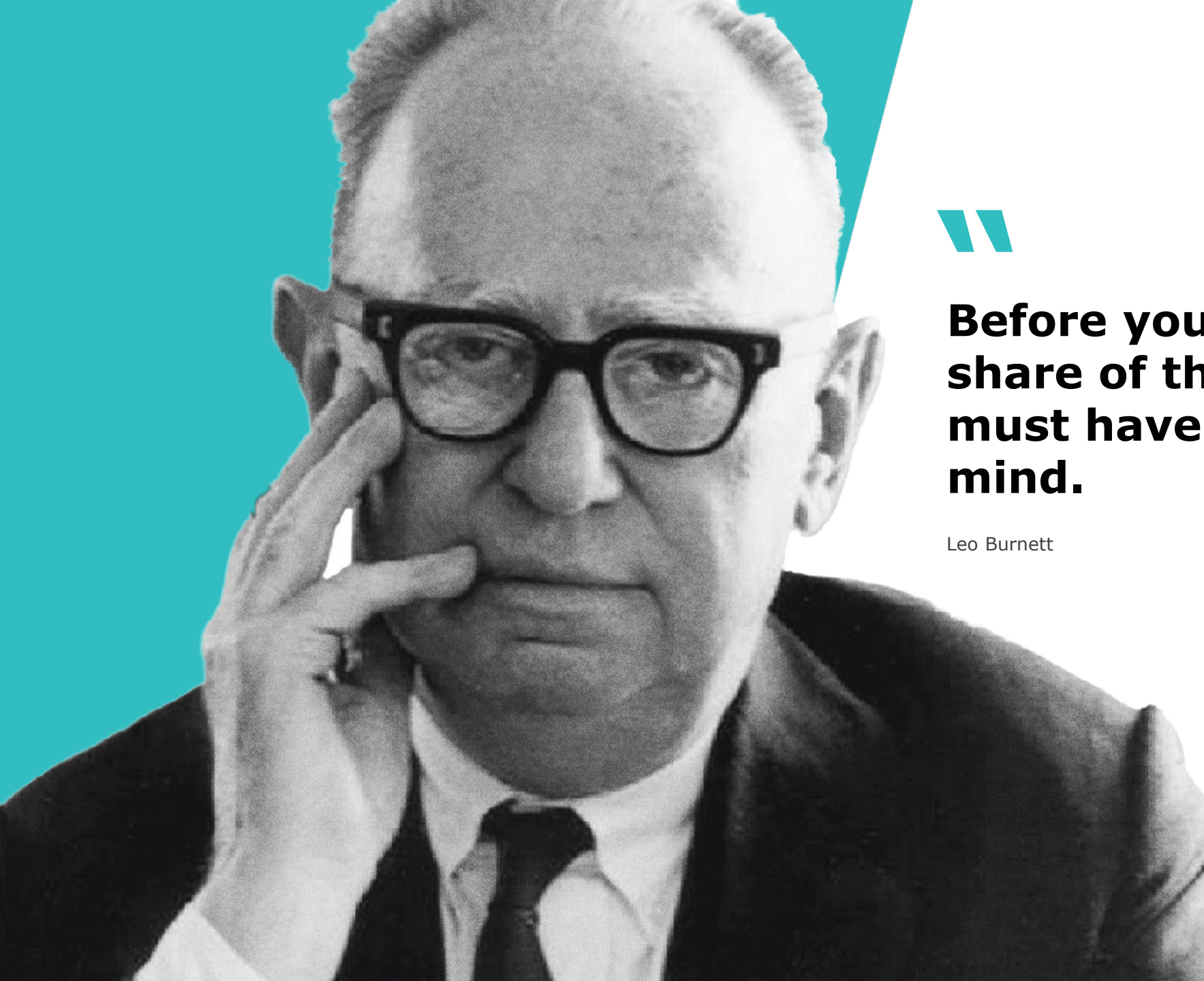
ADULTS 18-34	Channel	AMA (000)
NFL SUPER BOWL	CTV + TSN	1,638
CFL GREY CUP	TSN+	506
NHL PLAYOFFS ROUND 1	Rogers Sports Network	322
HNIC PRIME EAST	Rogers Sports Network	295
ROGERS NHL ALL-STAR GAME	Rogers Sports Network	279
WJC:PRELIM CANADA	TSN+	223
NFL PLAYOFFS SUNDAY PRIME	TSN+	198
NFL PLAYOFFS	CTV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

A middle-aged man and woman are sitting together in a living room. The man is holding a tablet and a smartphone, and the woman is smiling and looking at the devices. The background is a blurred living room with a painting on the wall.

# 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

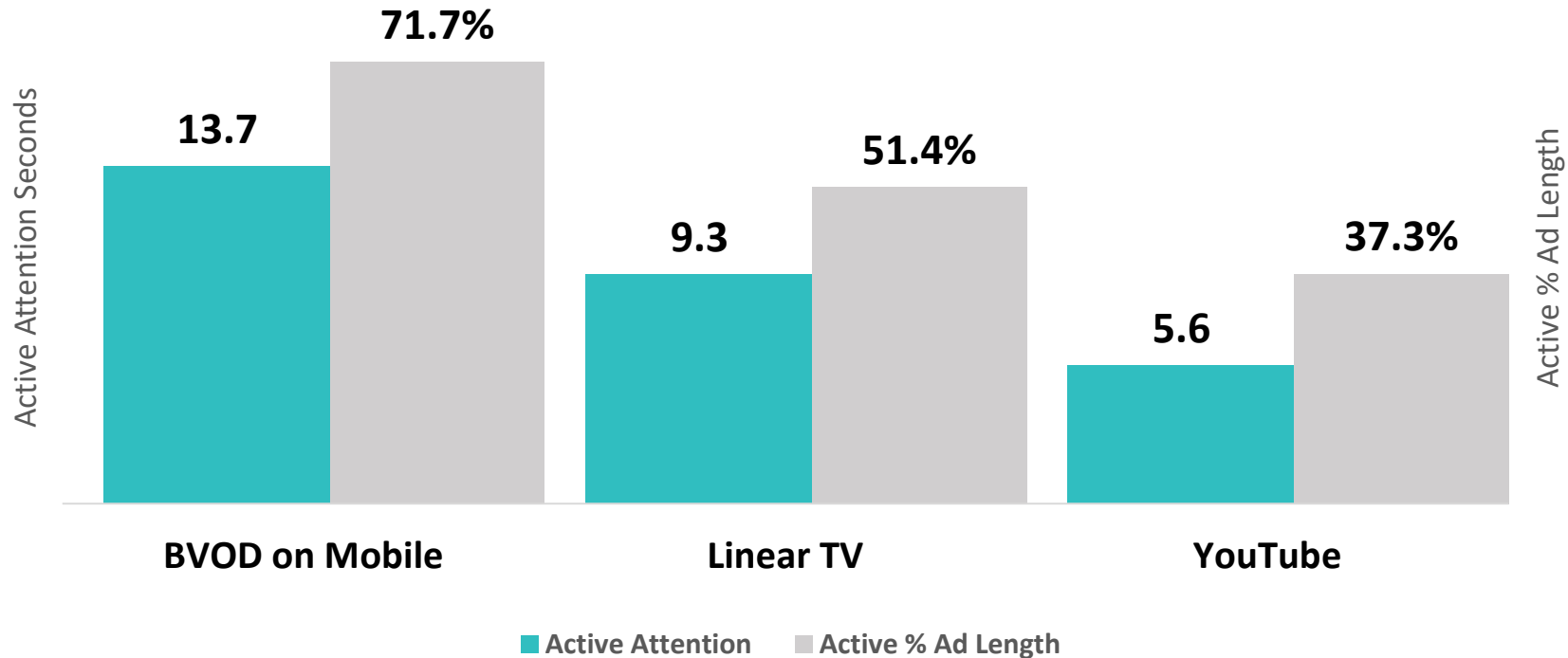
# tv commands more attention

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

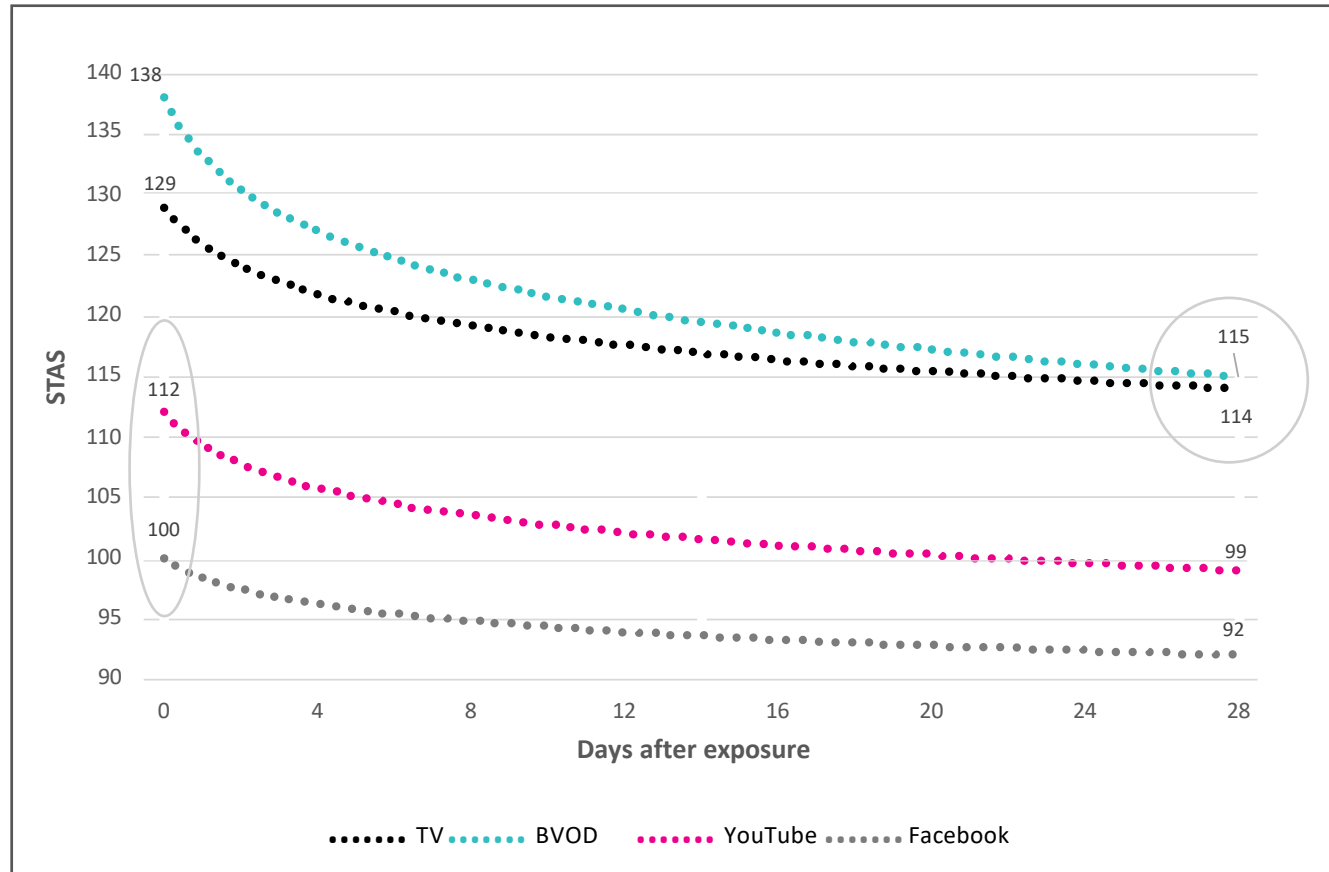
			
ACTIVE AVOIDANCE	2%	2%	32%
PASSIVE WATCHING	40%	94%	37%
ACTIVE WATCHING	58%	4%	31%

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

Active Attention by Platform



# a **tv** ad impacts sales far longer than any other platform

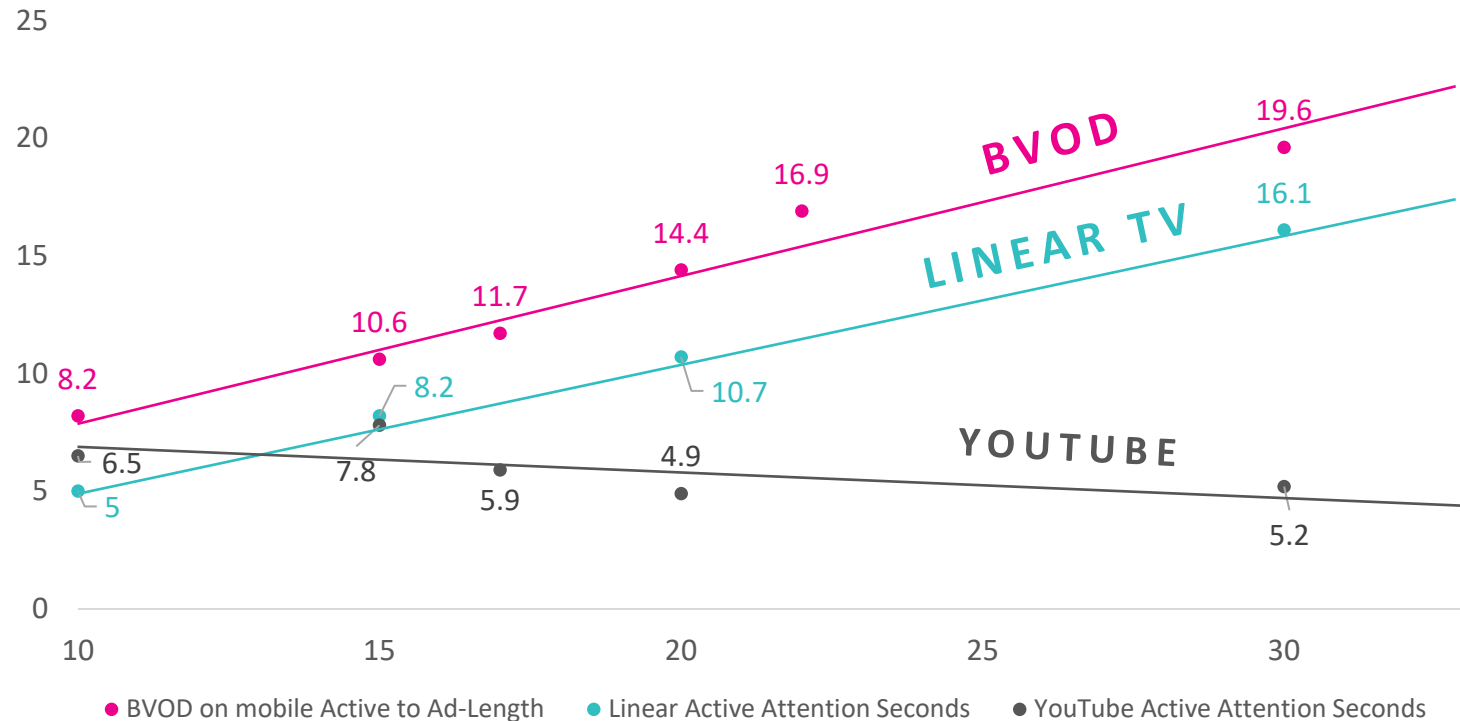


\*BVOD Modelled

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

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

Ad Length by Platform & Attention Type

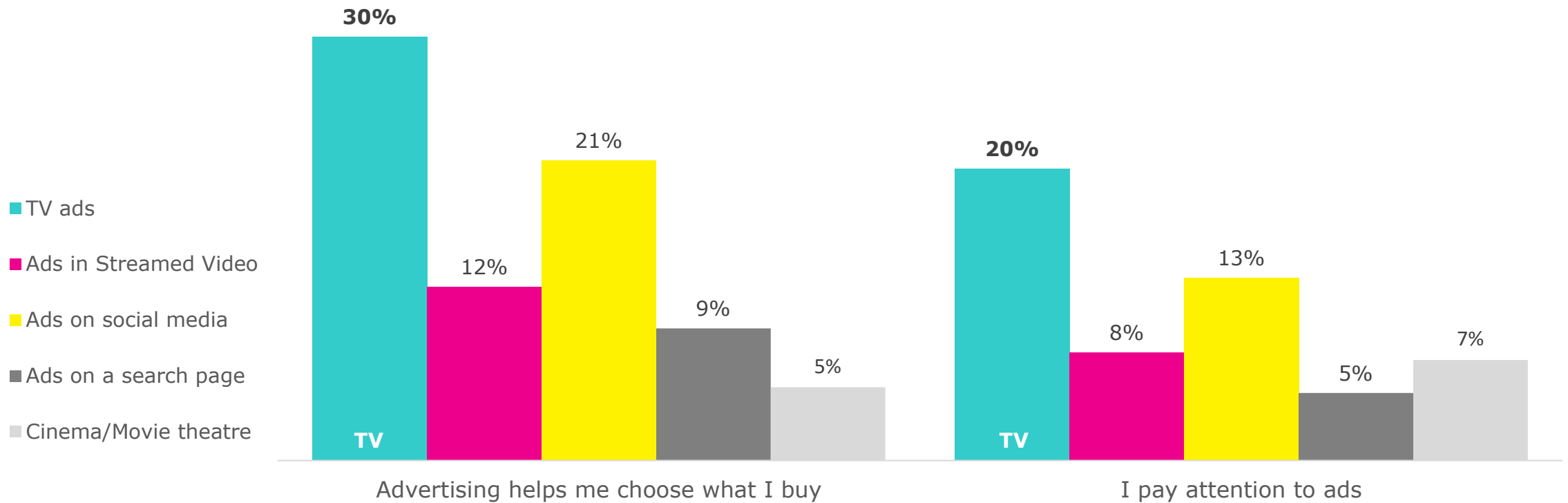


## TAKEAWAY:

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

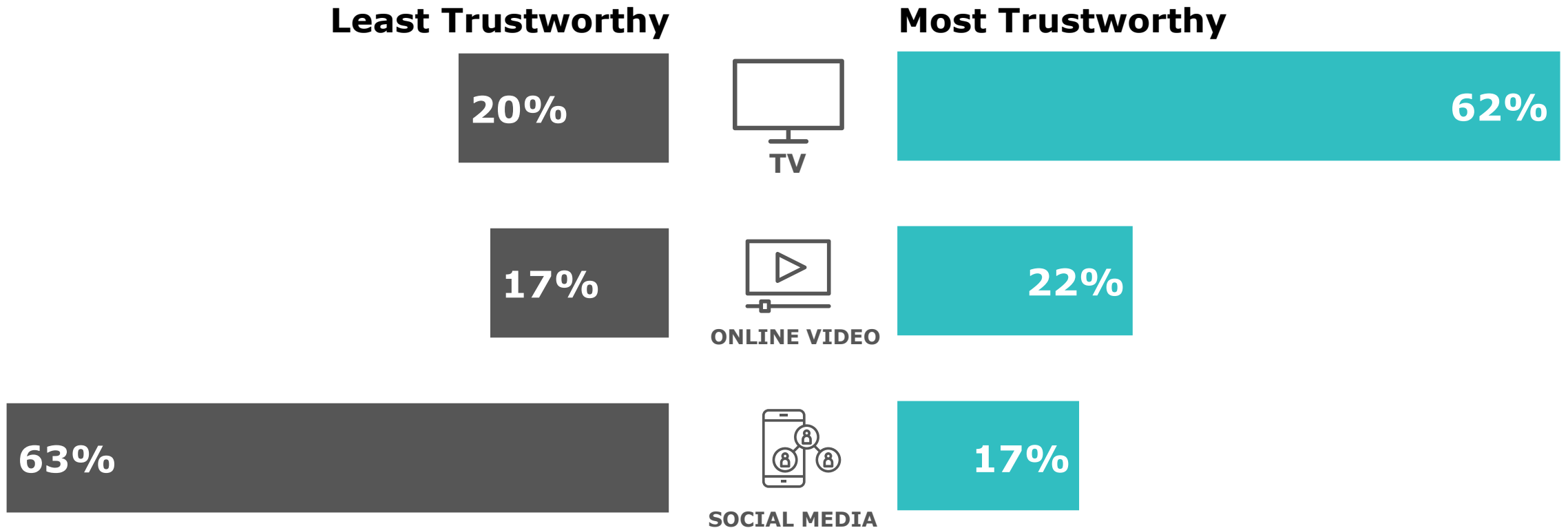


# **tv** advertising is most likely to command attention and drive purchase decisions



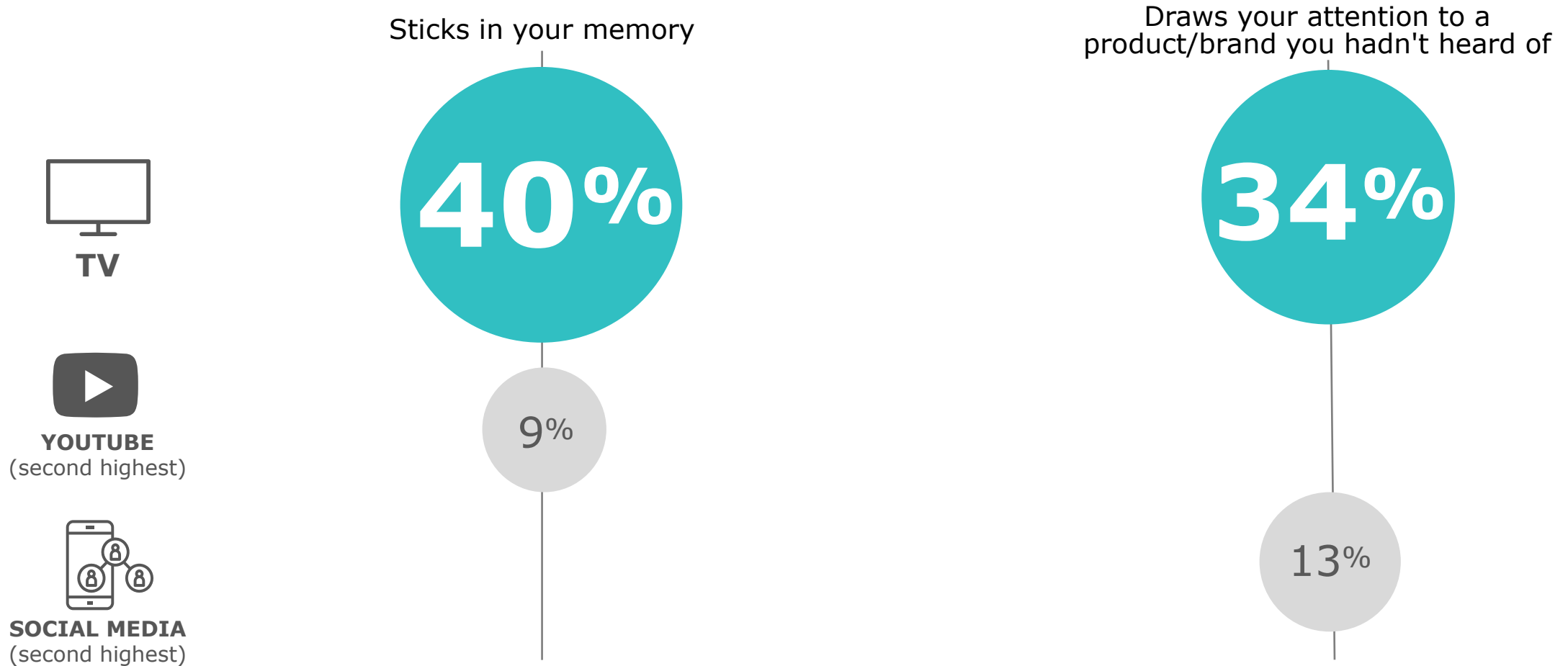
# tv is the most trusted medium

(while social media is the least trusted)



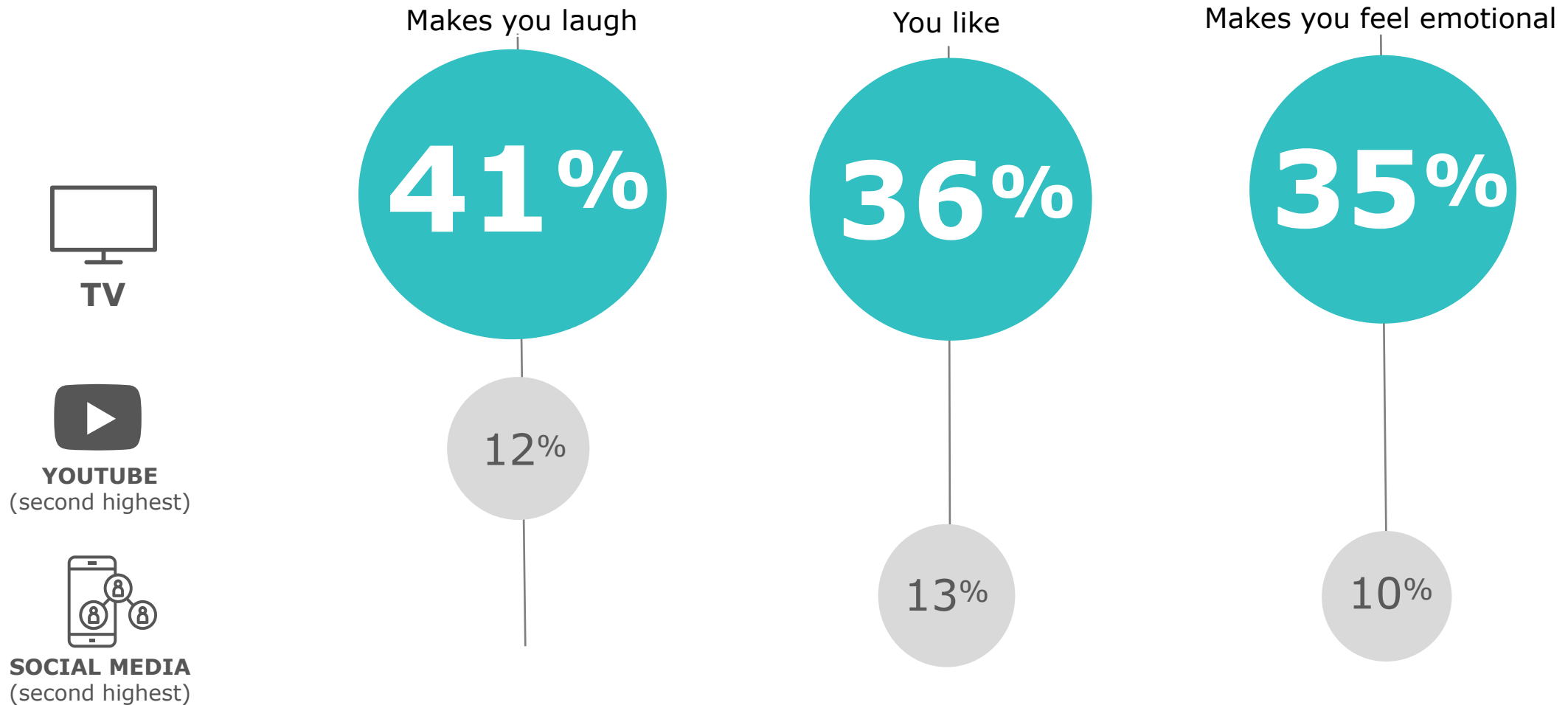
Which one of the following media carries video advertising that you believe to be most trustworthy? least trustworthy?

# 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..?*

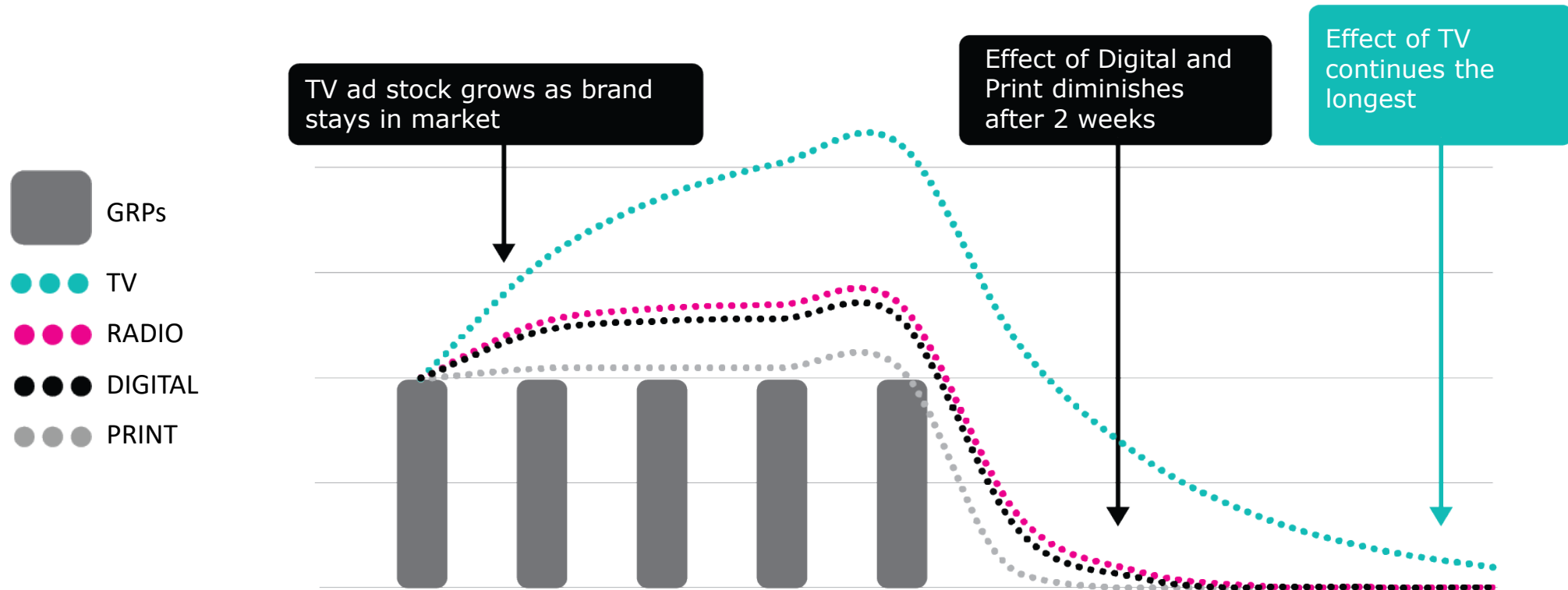
# tv advertising is the most likely to generate emotion and make you laugh



*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



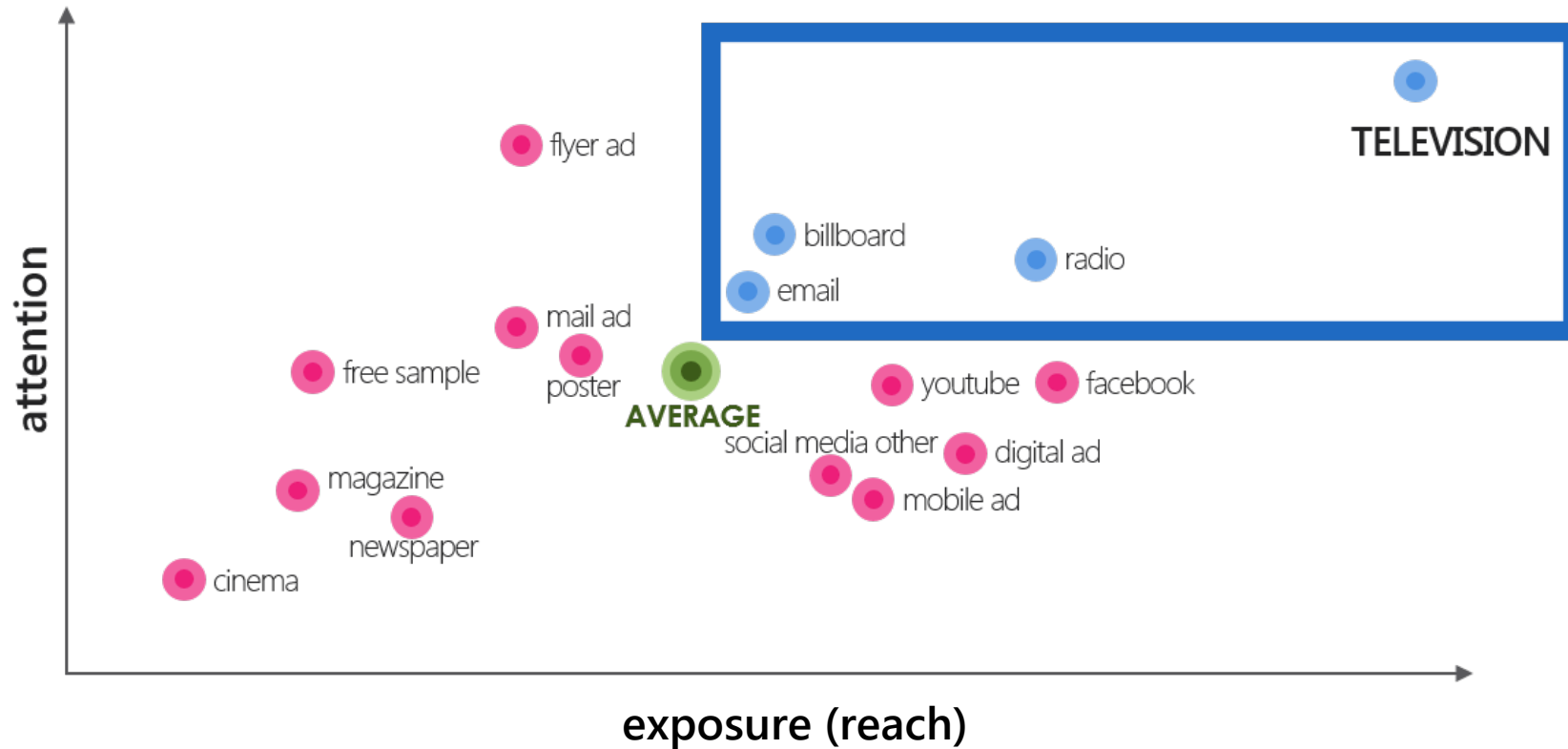


# tv is king

## 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**.



# demand

**tv drives consumer action**



think<sup>tv</sup>

# tv works throughout the funnel

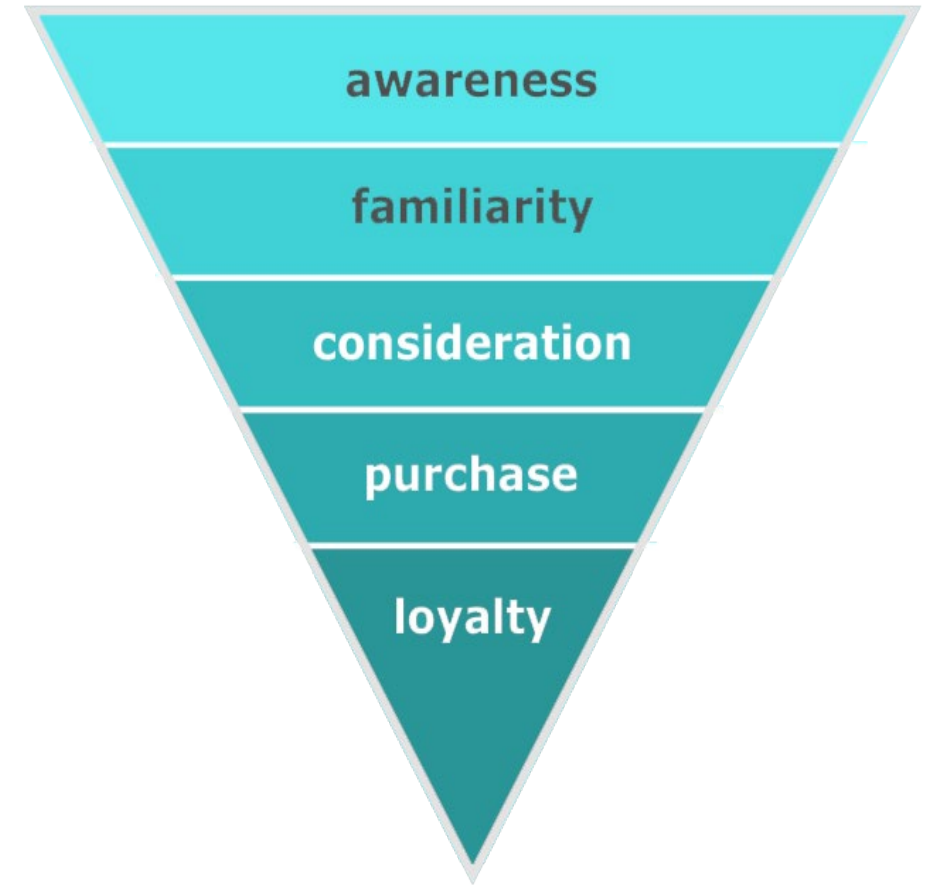
## TV is your best store-front window

### 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

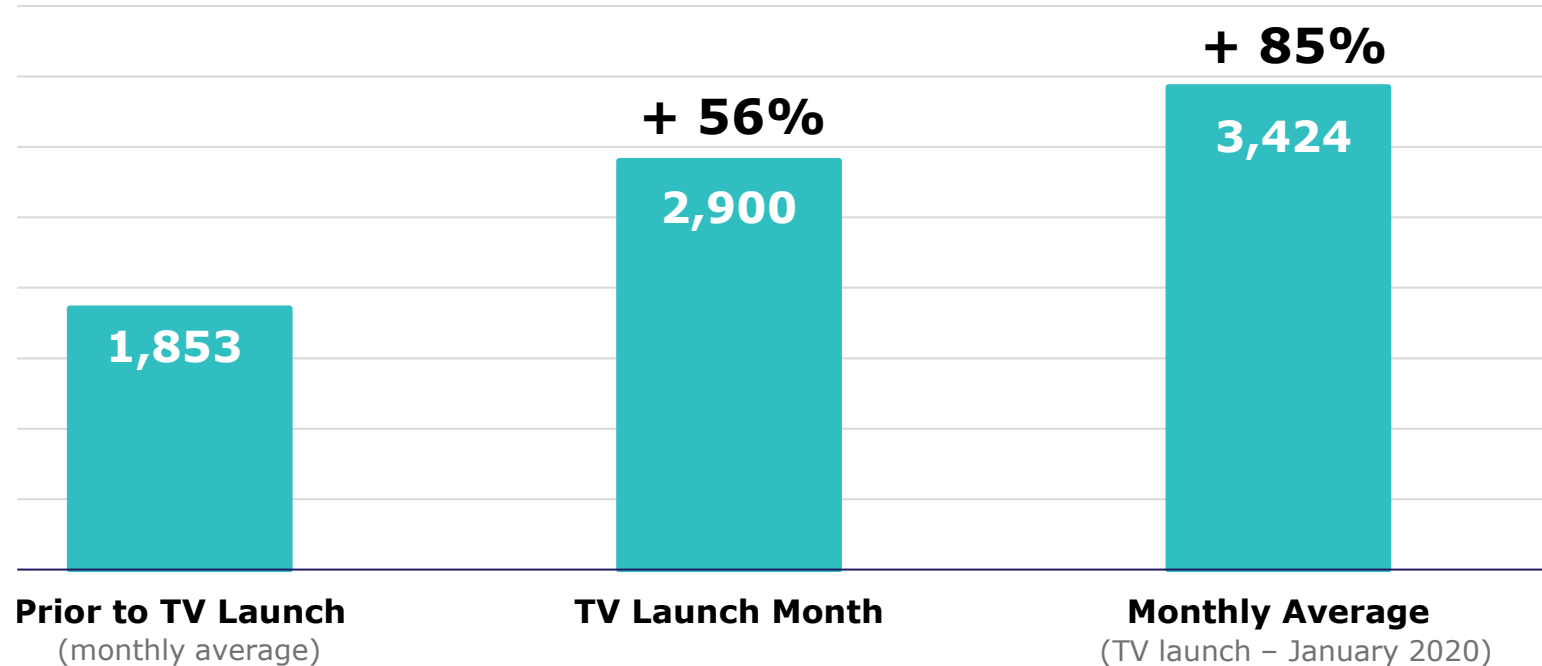
# tv drives the growth

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.

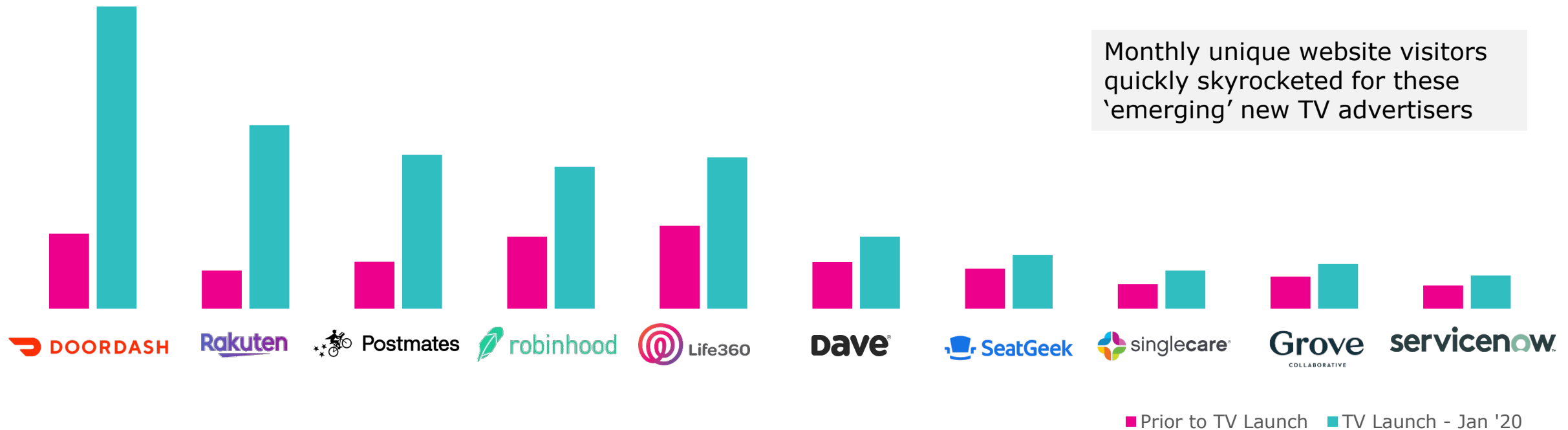


# tv drives the growth

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 mediаметrix 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**

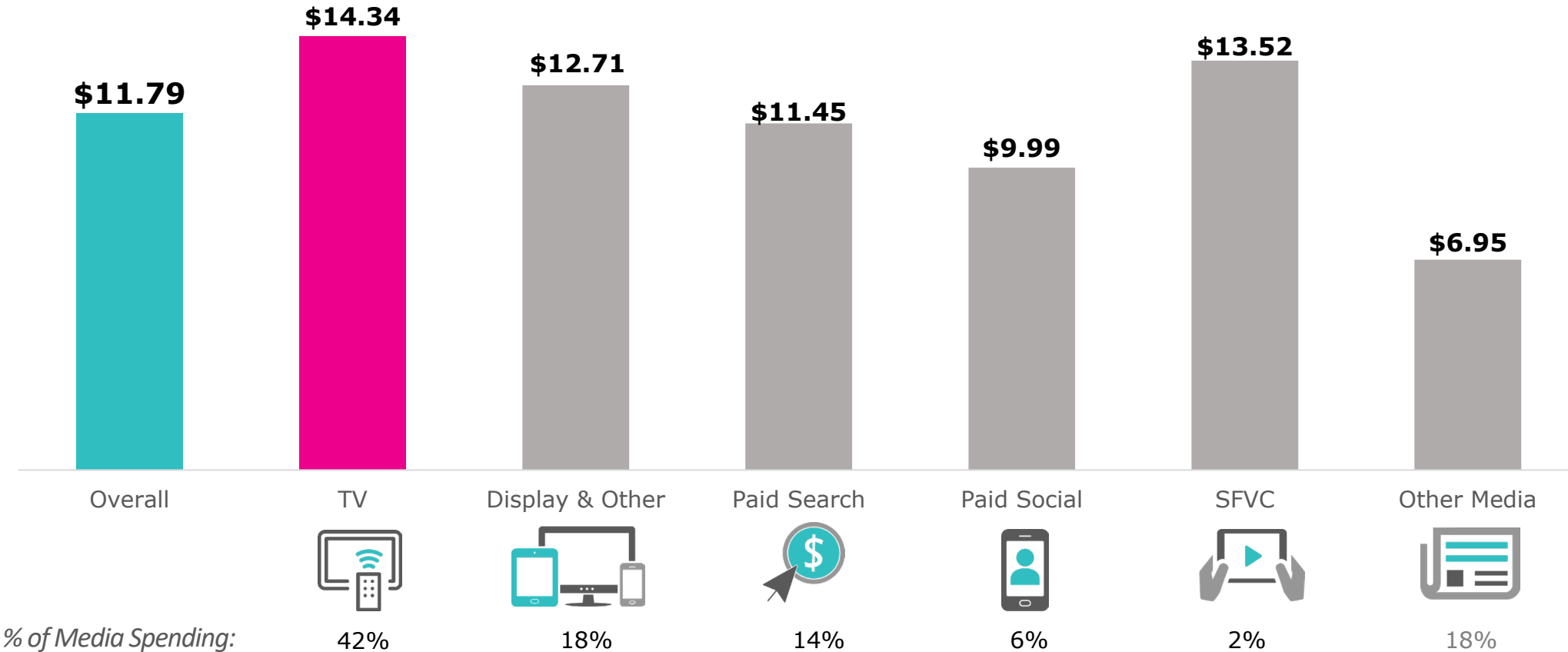


think<sup>tv</sup>

# tv delivers the best ROI

TV's ROI is \$14.34 for every dollar spent

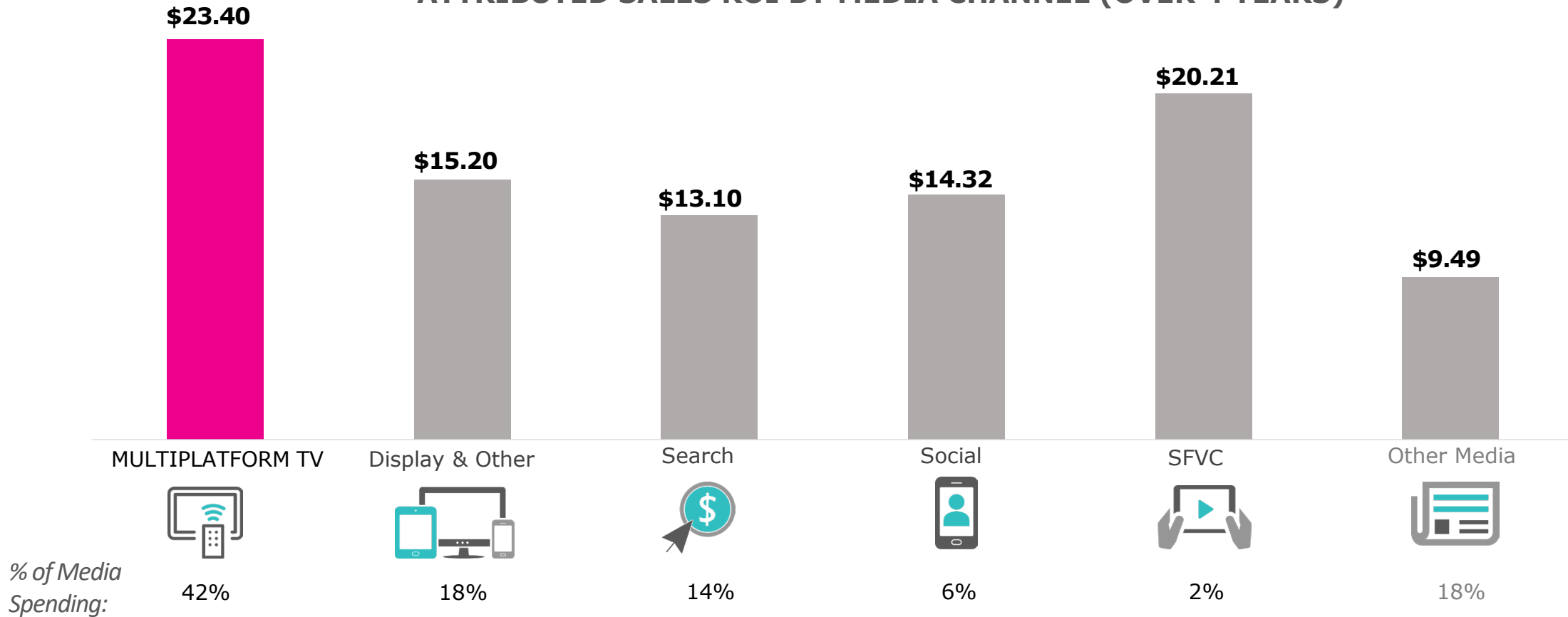
ATTRIBUTED SALES ROI BY MEDIA CHANNEL OVER A ONE YEAR PERIOD



# tv delivers the best ROI

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

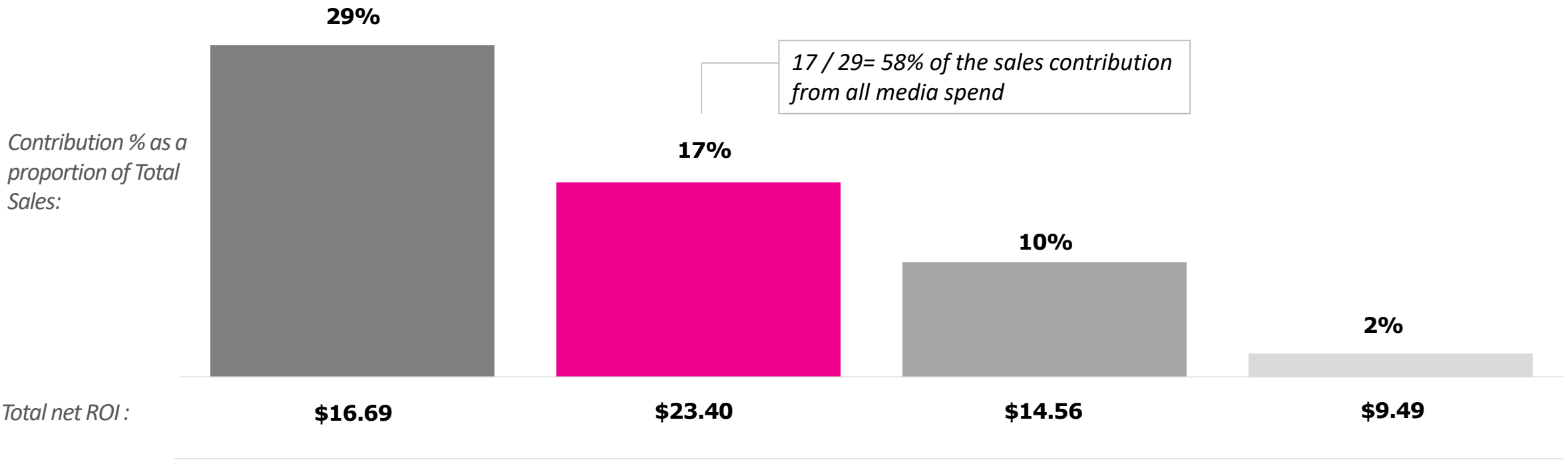
ATTRIBUTED SALES ROI BY MEDIA CHANNEL (OVER 4 YEARS)







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



All Media Channels TV

Multiplatform TV

Digital Media

Other Media

% of Media Spending:

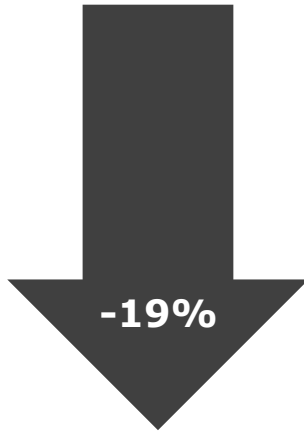


# tv improves digital's performance

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



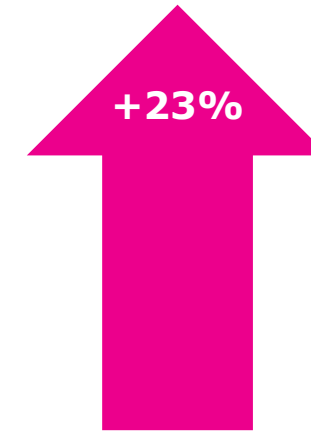
Standalone Digital ROI



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



TV's Adjusted ROI





**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 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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