

tv today

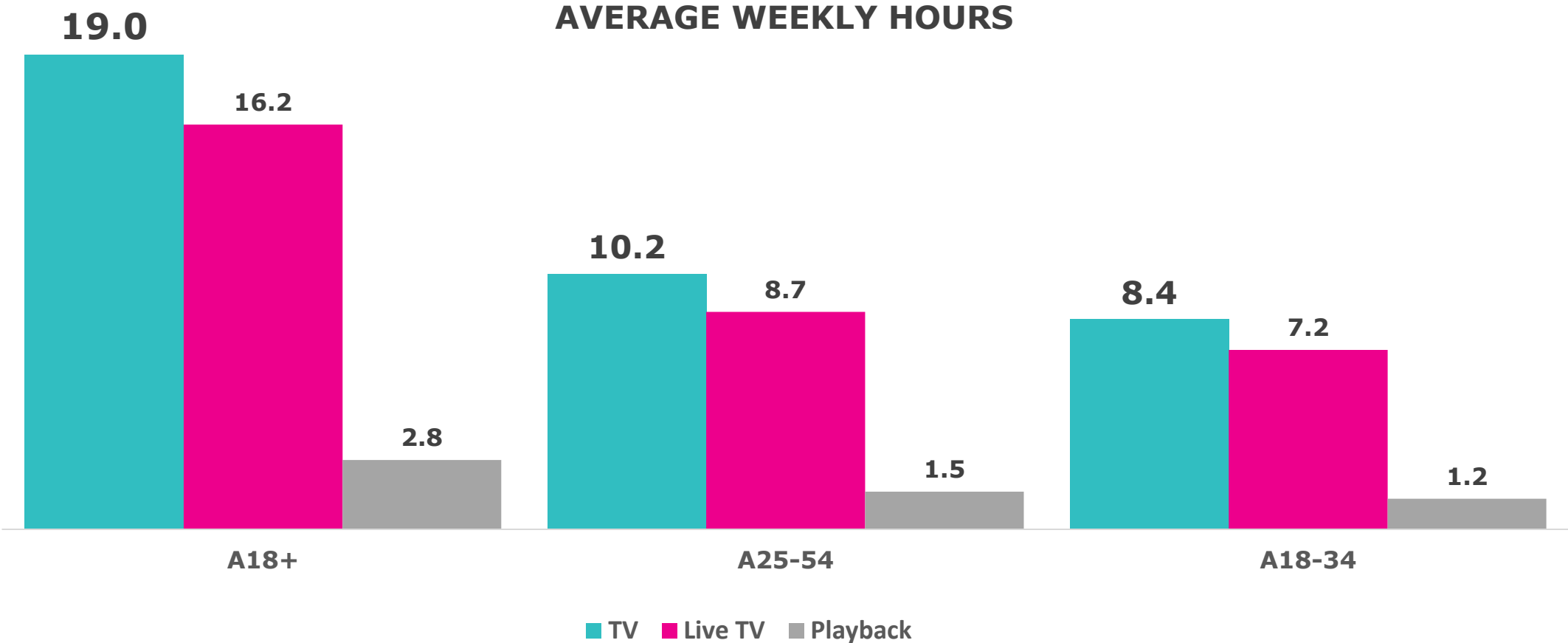


think^{tv}

Canadians watch a lot of



and most of it is live



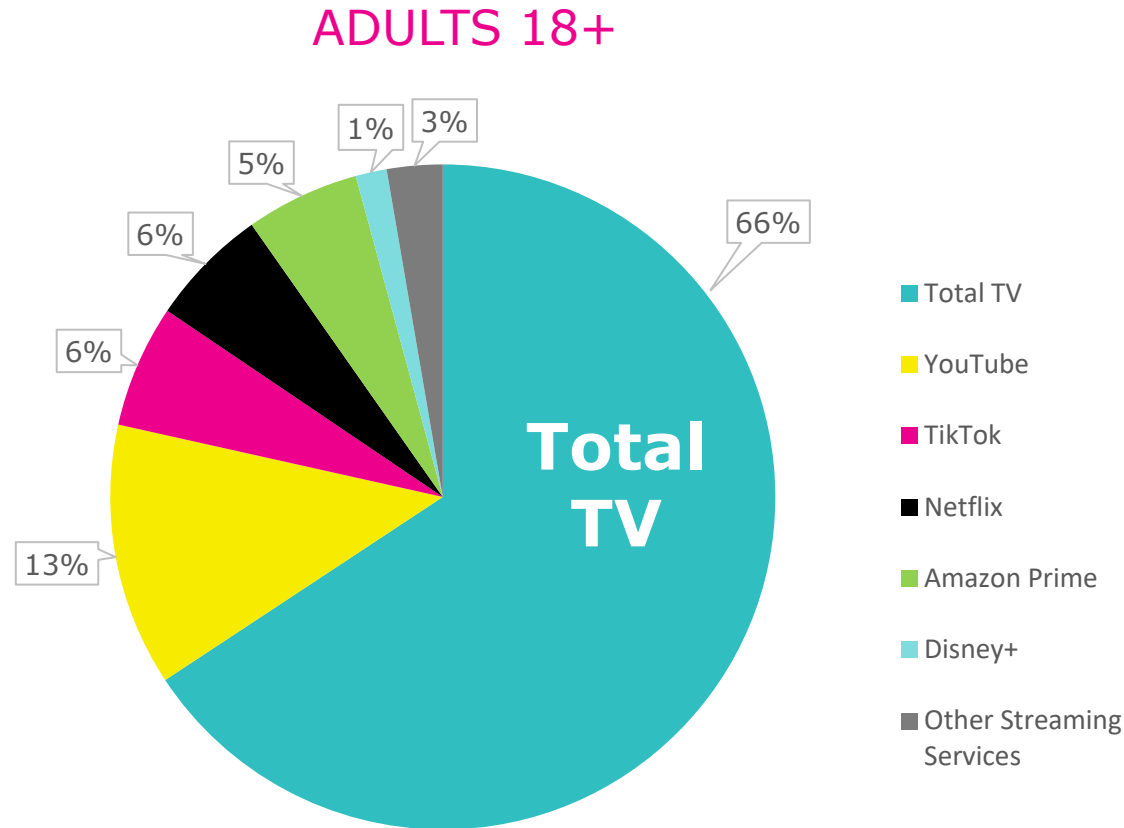
Source: Numeris, Total Canada, Sep 18, 2023 – May 26, 2024, Average Weekly Hours per Capita

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.

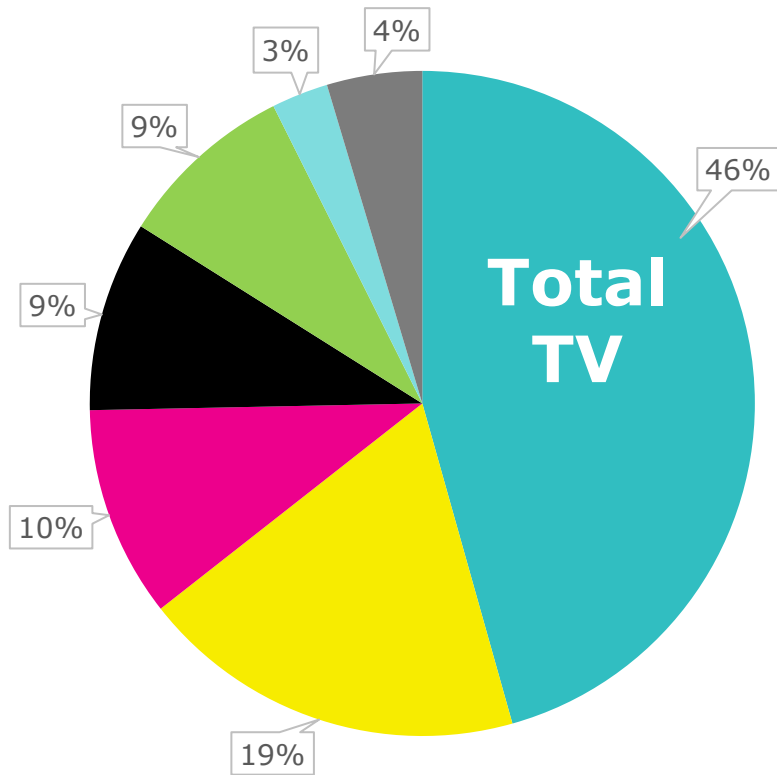
Total TV dominates time spent with video

SHARE OF VIDEO Ontario



...in all key demos

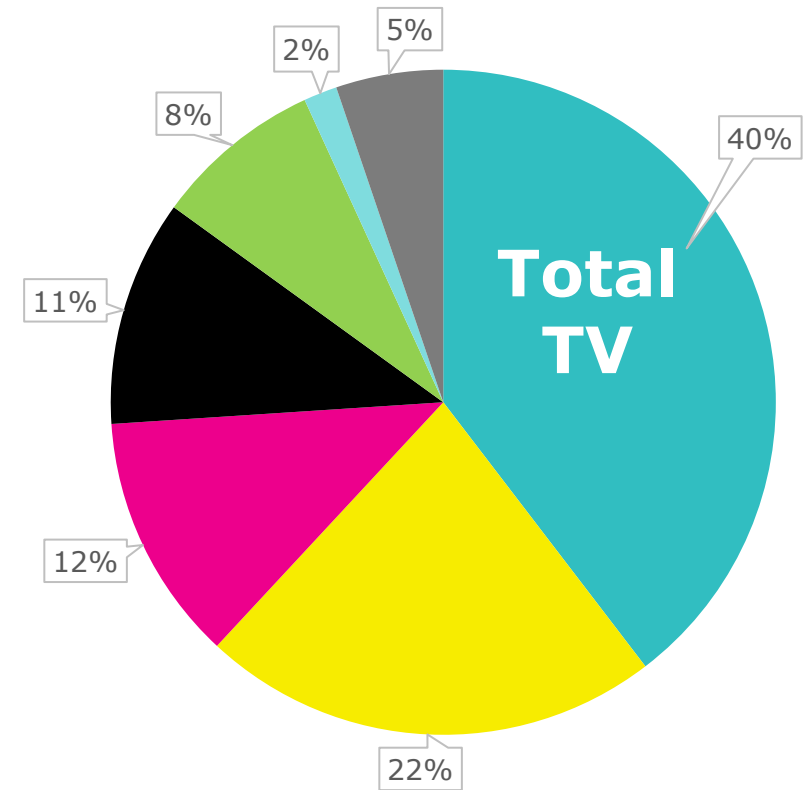
ADULTS 25-54



SHARE OF VIDEO
Ontario



ADULTS 18-34



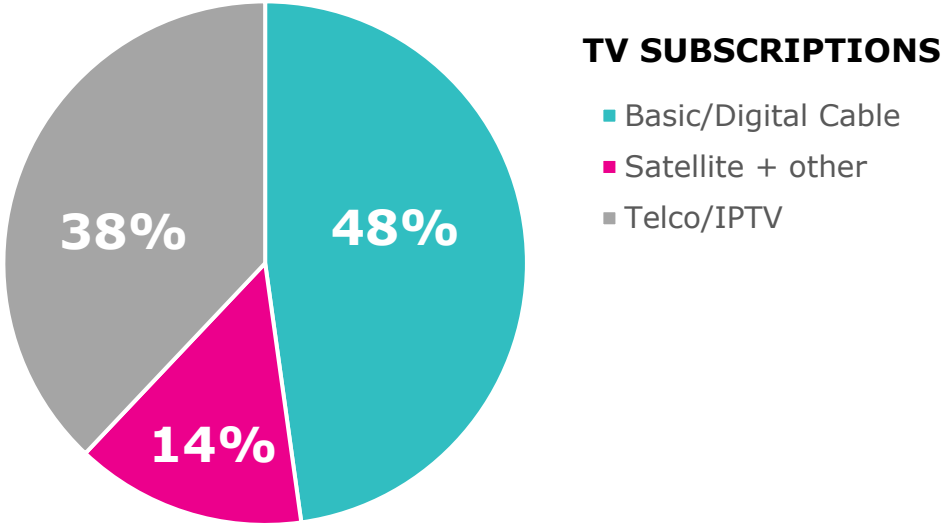
9.7 million paid **tv** subscriptions

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%

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.

tv has tremendous reach



AVERAGE WEEKLY REACH

83%
adults (18+)

76%
adults (25-54)

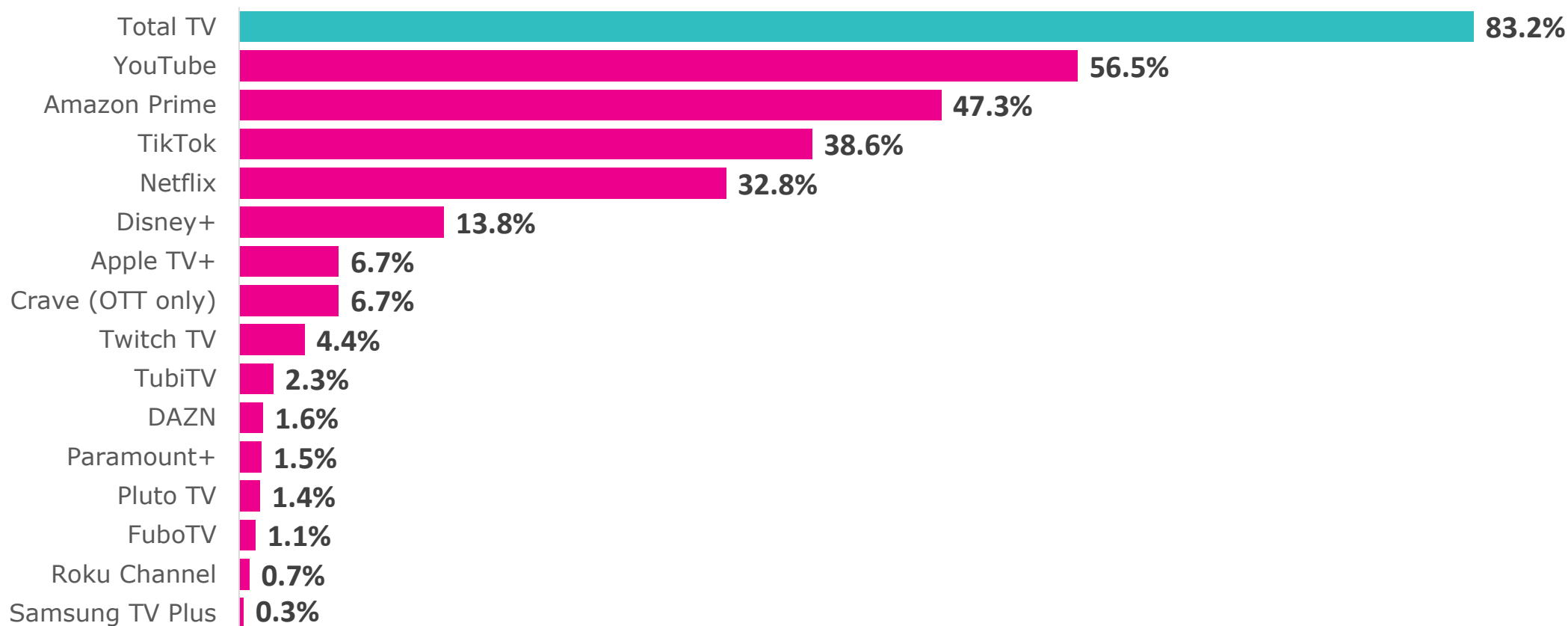
72%
adults (18-34)

72%
teens (12-17)

68%
kids (2-11)

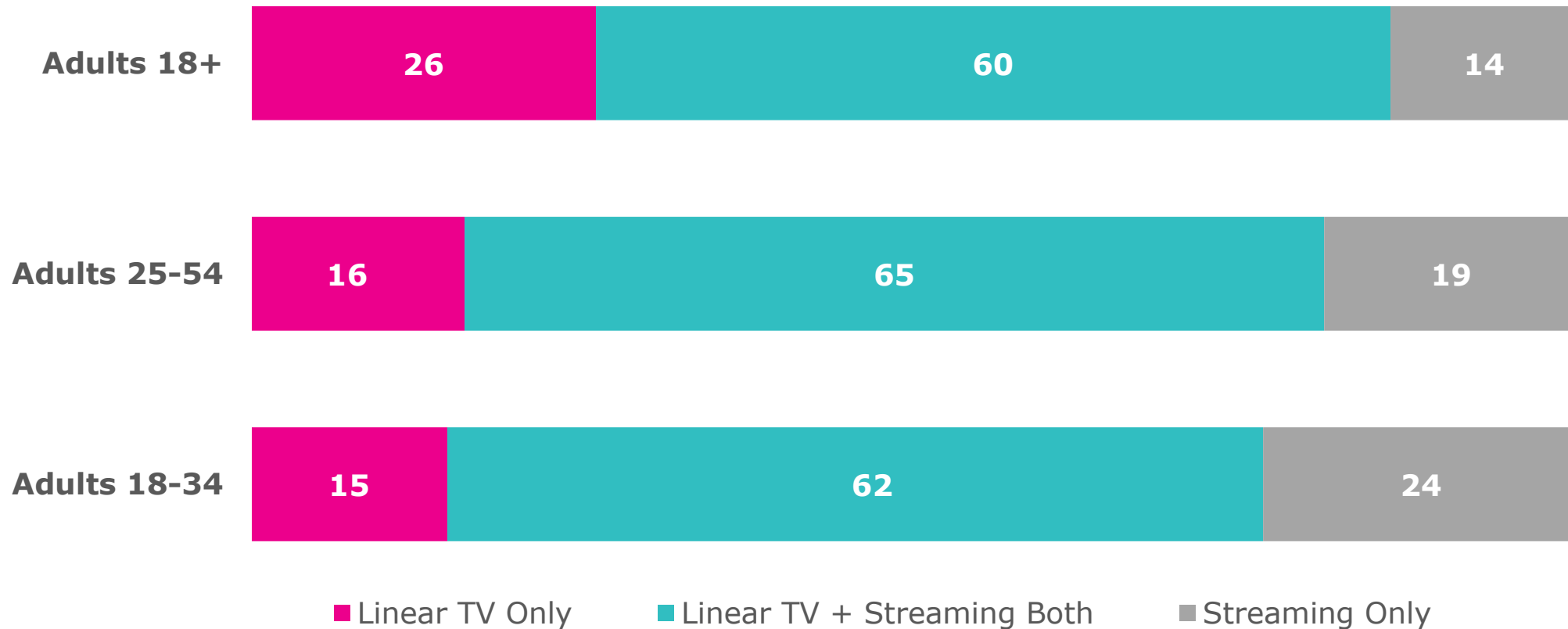
tv's reach far exceeds all streaming services

AVERAGE WEEKLY REACH% ADULTS 18+ | Ontario



majority of Canadians access both linear TV & streaming services

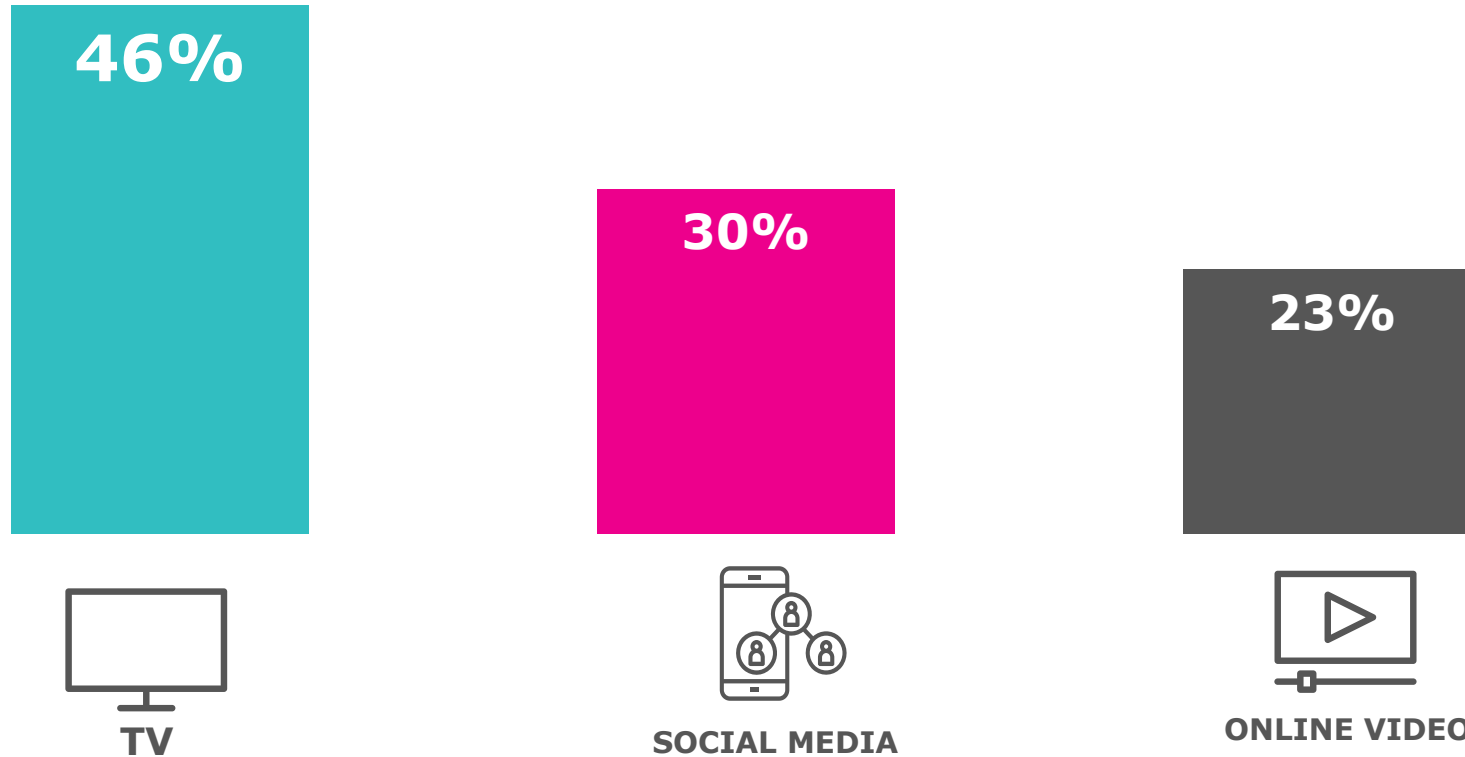
DUPLICATED REACH%



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




tv ads get the most attention



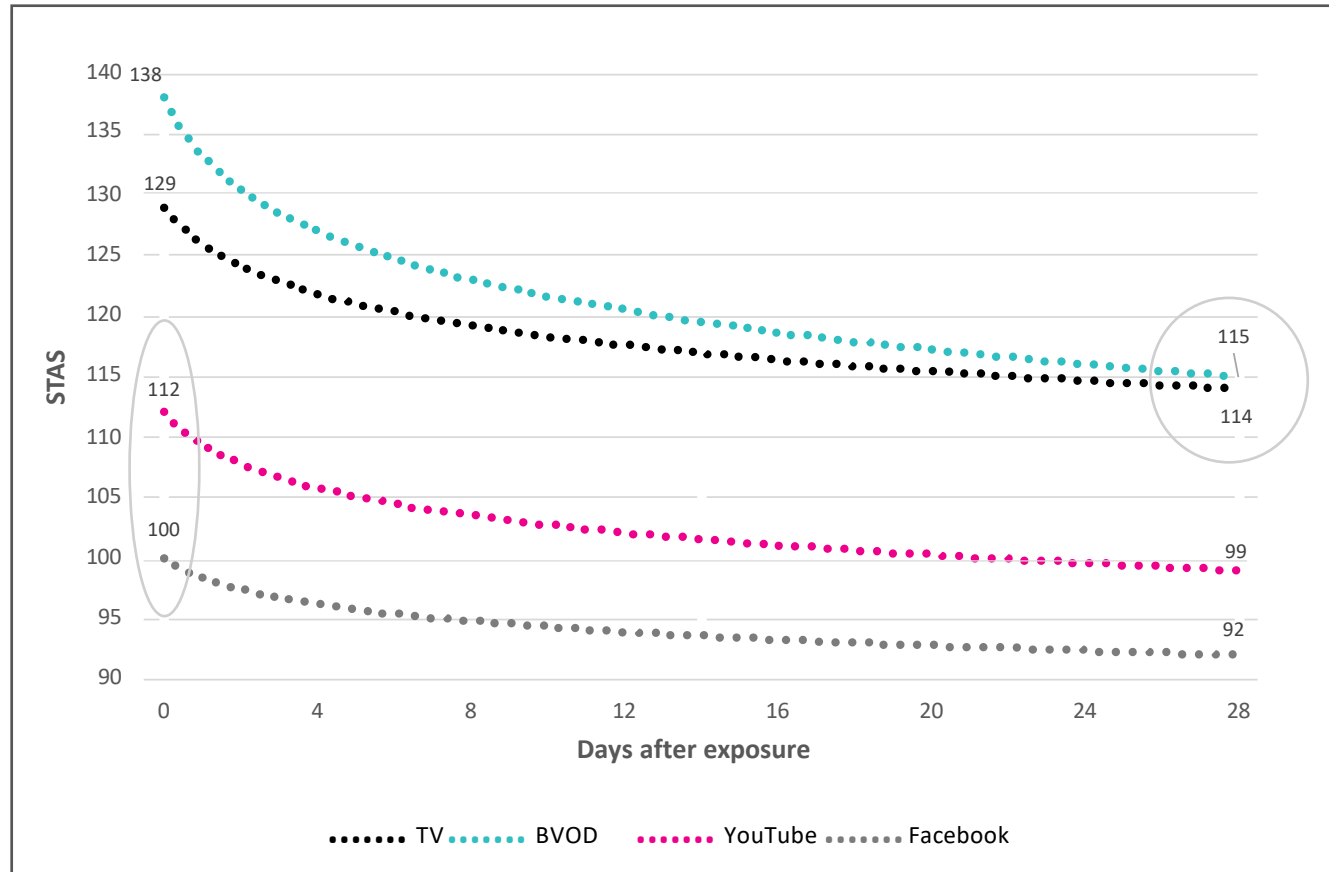
Q: Which ONE of the following media carries video advertising that best **captures your ATTENTION?**

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%

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



*BVOD Modelled

TV ads delivers a greater impact at 28 days than either Facebook or YouTube do immediately after exposure.

tv works throughout the funnel

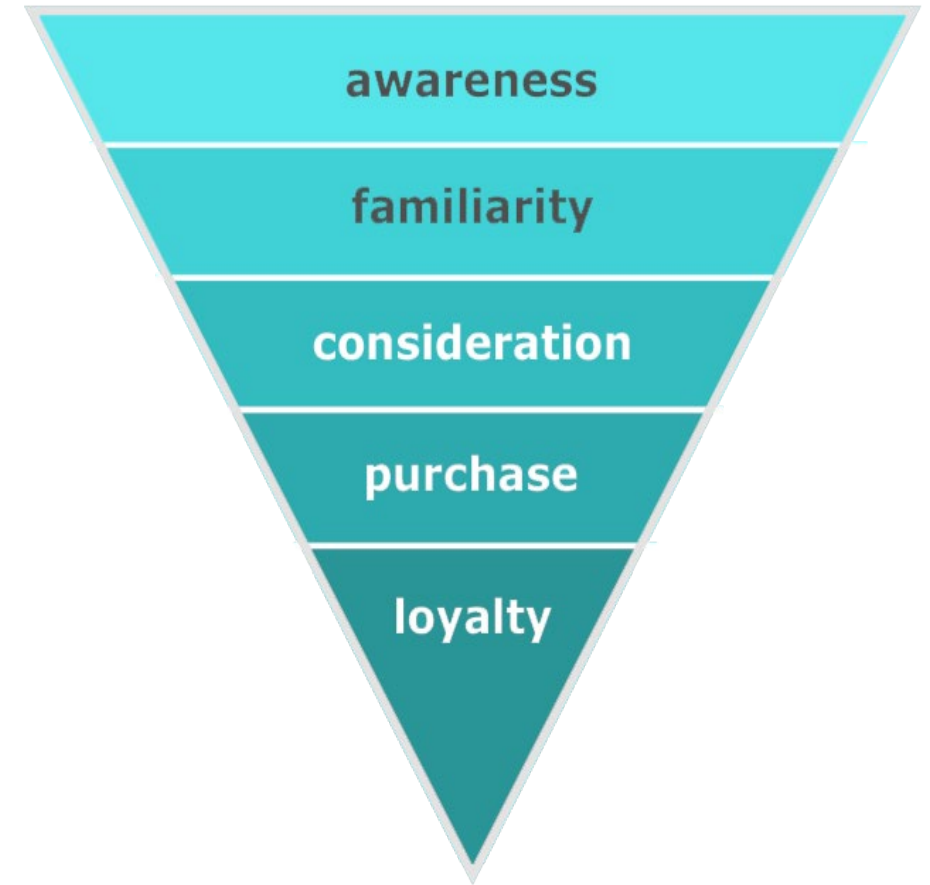
TV is your best store-front window

Top of the Funnel

- Awareness
- Brand building
- Interest / purchase intent

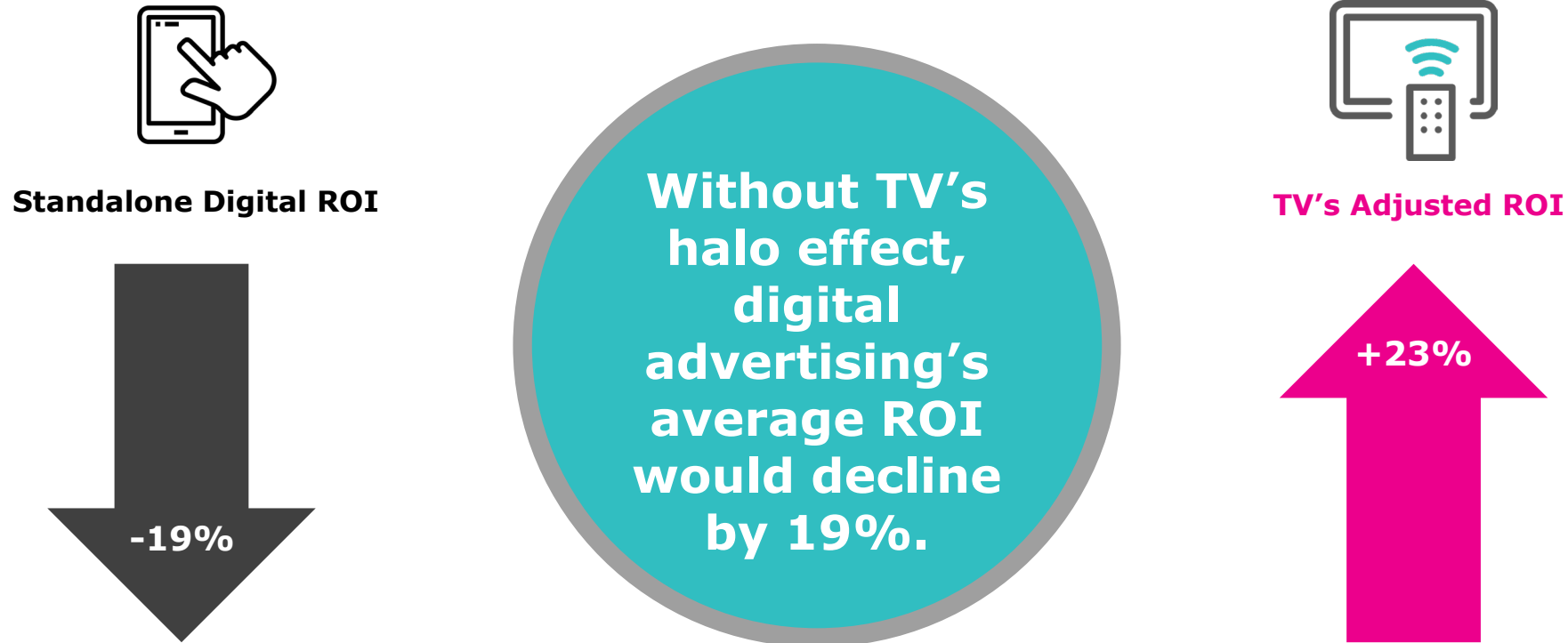
Bottom of the Funnel

- Activation via sales promotions messages
- TV ads drive website visits
- Thanks to digital, you can literally buy online *while* watching the TV commercial



tv improves digital's performance

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



tv's winning formula



TV dominates time spent with media



TV ads produce the biggest impact



TV works @ both ends of the funnel



TV improves the performance of online advertising



TV delivers the strongest ROI of all media

reach us @



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