

**the power of tv**  
**in an attention economy**



**think**<sup>tv</sup>

# tv fast facts

- **Linear TV reaches 82% of Canadian adults every week (27 Million A18+) and 71% of young adults (A18-34)**
- **Time spent with TV exceeds the streaming services**
- **TV garners the most attention: TV commands twice as much active watching as YouTube**
- **TV is the most trusted medium for video advertising**
- **TV delivers one of the strongest ROIs and is the largest contributor to profit volume**

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



**tv** drives results because it delivers:

➤ reach ➤ demand

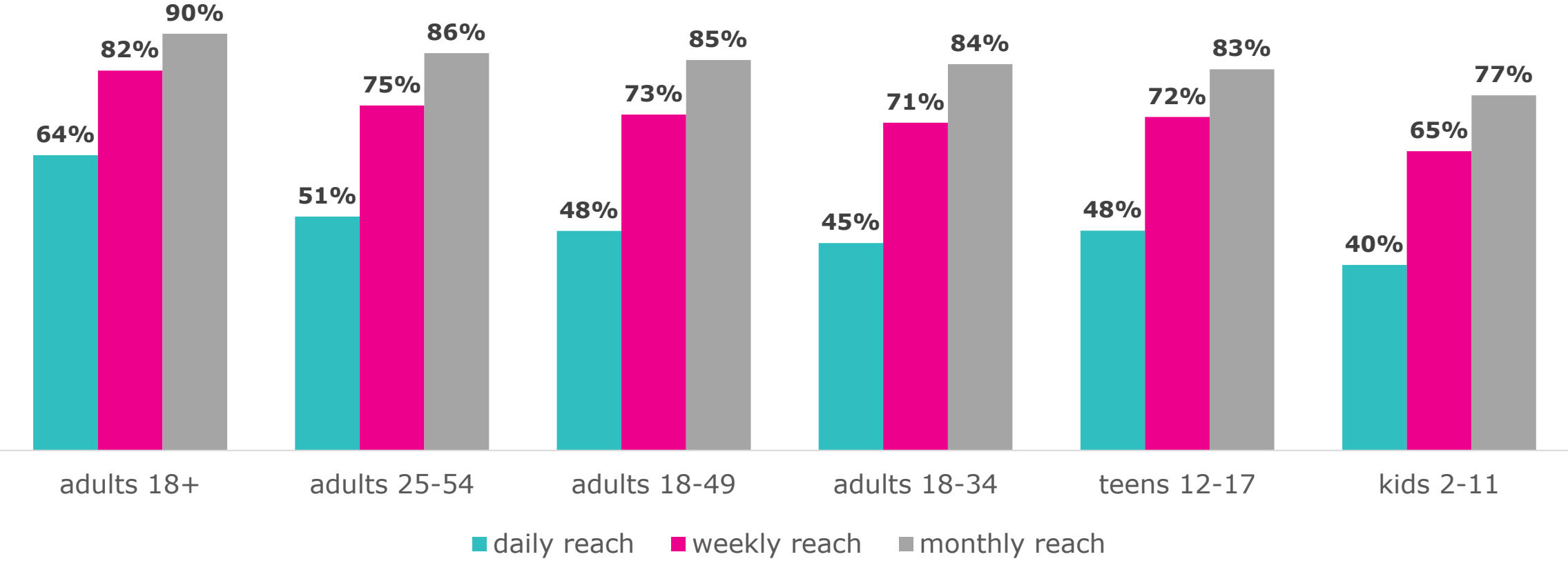
➤ impact ➤ efficiency

# reach

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



# linear TV reaches 90% of Canadians (A18+) each month



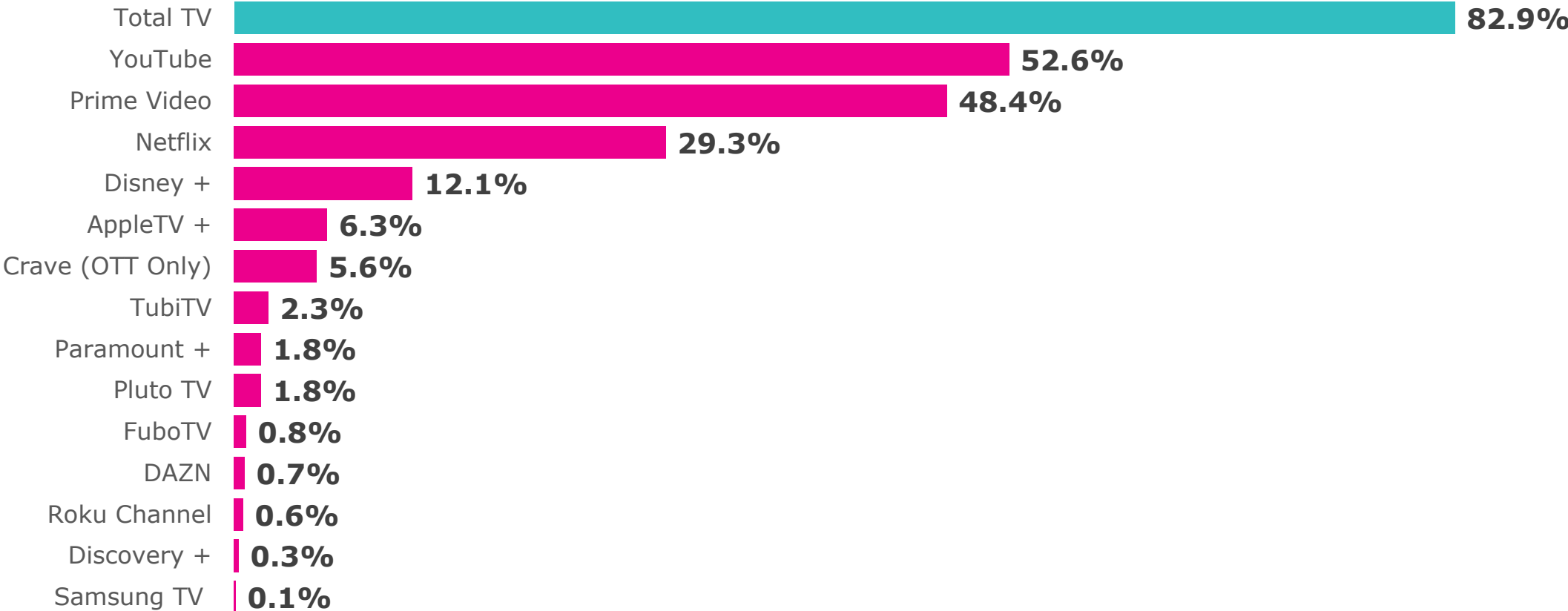
Source: Numeris PPM, Total Canada, 09/16/24 to 12/15/24

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.

# Total TV delivers unmatched reach

## AVERAGE WEEKLY REACH %

ADULTS 18+ | ONTARIO

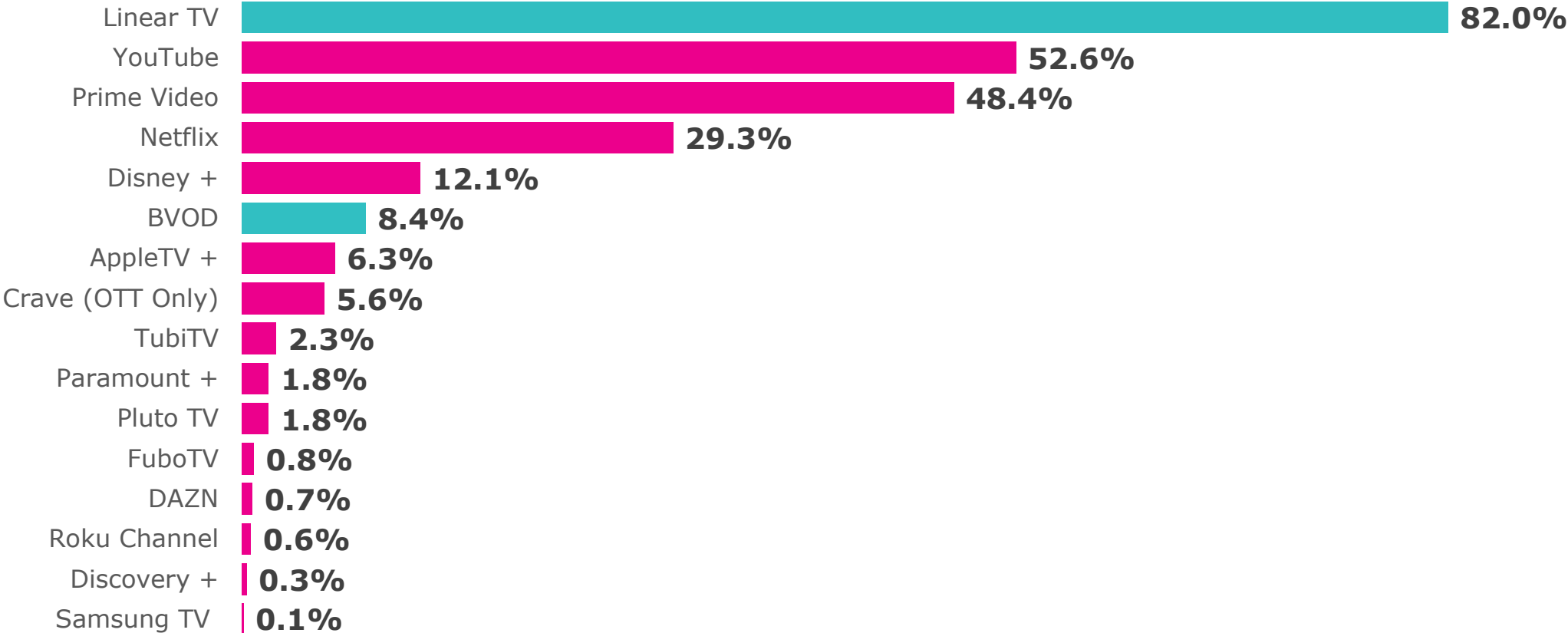


Source: Numeris VAM 09/16/24 to 12/15/24, Ontario  
Total TV defined as linear TV and broadcaster streaming services | Streaming Services are ad-free and ad-supported services (in-home viewing only)

# linear TV's reach exceeds all streaming services

## AVERAGE WEEKLY REACH %

ADULTS 18+ | ONTARIO



Source: Numeris VAM 09/16/24 to 12/15/24, Ontario  
Total TV defined as linear TV and broadcaster streaming services | Streaming Services are ad-free and ad-supported services (in-home viewing only)



**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



# access to TV is almost universal

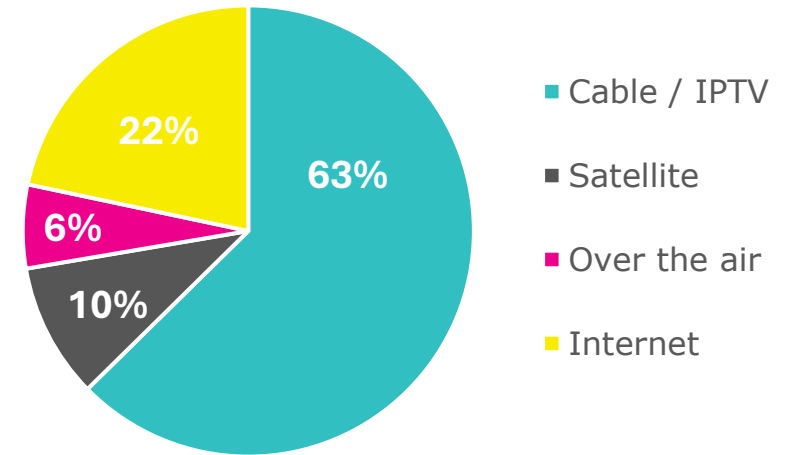
nearly all Canadians (99.5%) have access to linear TV, either through paid TV services (cable / IPTV) or internet streaming platforms

while household penetration of paid TV subscriptions remains strong in Canada—with paid TV subscriptions declining just 3% year-over-year (shown in chart on left)—anyone with an internet connection has access to linear TV content (illustrated in chart on right)

### PAID TV SUBSCRIPTIONS

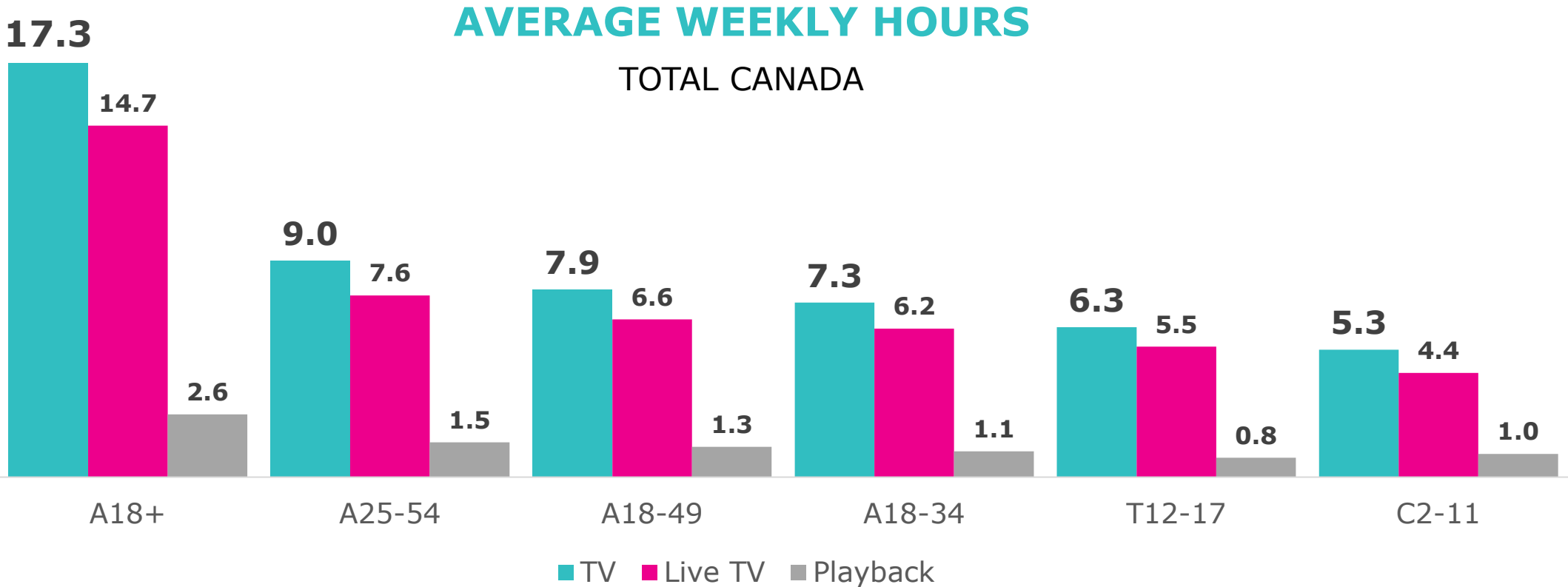
	June '23	June'24	Index (YOY)
<b>TOTAL PAID SUBS</b>	9,921,891	9,635,859	<b>(3%)</b>
Basic/Digital Cable	4,889,042	4,535,628	(7%)
Satellite	1,452,503	1,291,232	(11%)
Telco/IPTV (Internet Protocol TV)	3,556,771	3,786,098	+6%
Other	23,575	22,901	(3%)

### TV ACCESS



Source: Mediastats, BDU Profile Report, Total Canada | IPTV = Internet Protocol Television: the delivery of television content over Internet Protocol (IP) networks, e.g. Bell Fibe TV, Telus/Optik TV  
Source: Numeris Universe Estimates: January 2025 Reception Type Update - PPM TV Panels, Total Canada, persons 2+

# Canadians watch a lot of linear TV and most of it is live

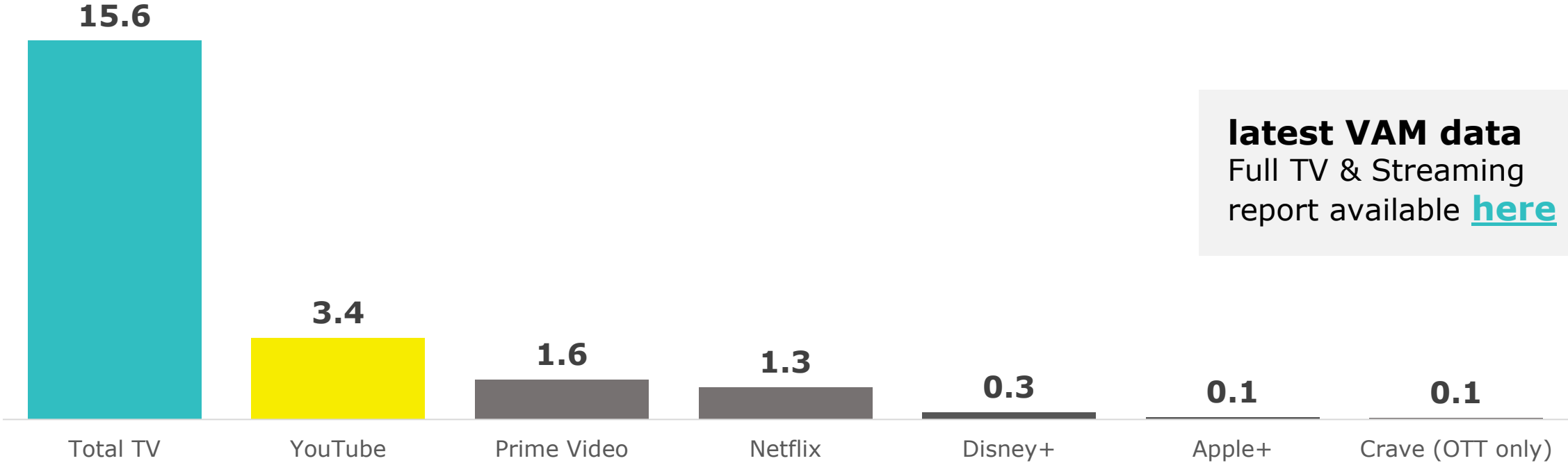


Source: Numeris, Total Canada, 09/16/24 to 12/15/24, Average Weekly Hours per Capita  
Linear TV = viewing to any live broadcaster content (streamed on any platform and linear TV) plus any playback (with commercial load intact) that is viewed within 7 days of initial broadcast. Does not include on demand streaming.

# viewers spend more time with Total TV

## AVERAGE WEEKLY HOURS

ADULTS 18+ | ONTARIO

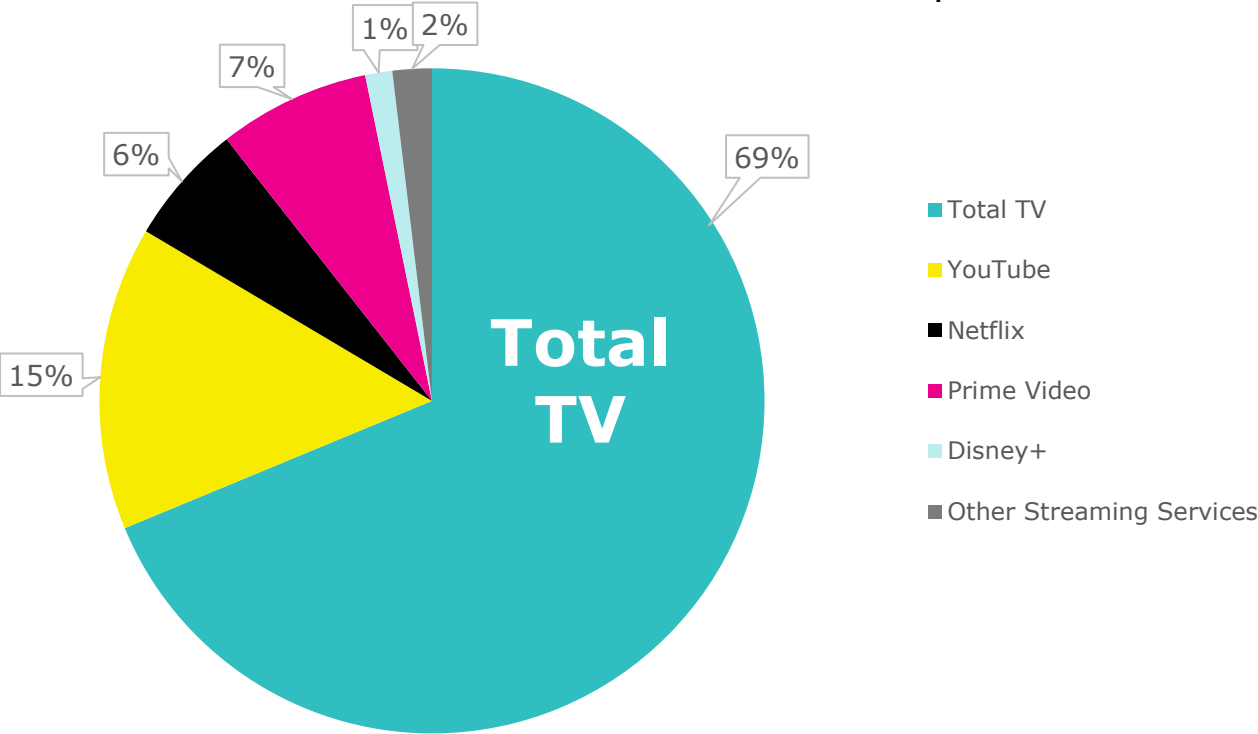


**latest VAM data**  
Full TV & Streaming  
report available [here](#)

Source: Numeris VAM, 09/16/24 to 12/15/24 | Ontario | all time spent per capita  
Total TV defined as linear TV and broadcaster streaming services | Streaming Services are ad-free and ad-supported services (in-home viewing only)

# Total TV = greatest share of time spent with video

## SHARE OF VIDEO ADULTS 18+ | ONTARIO

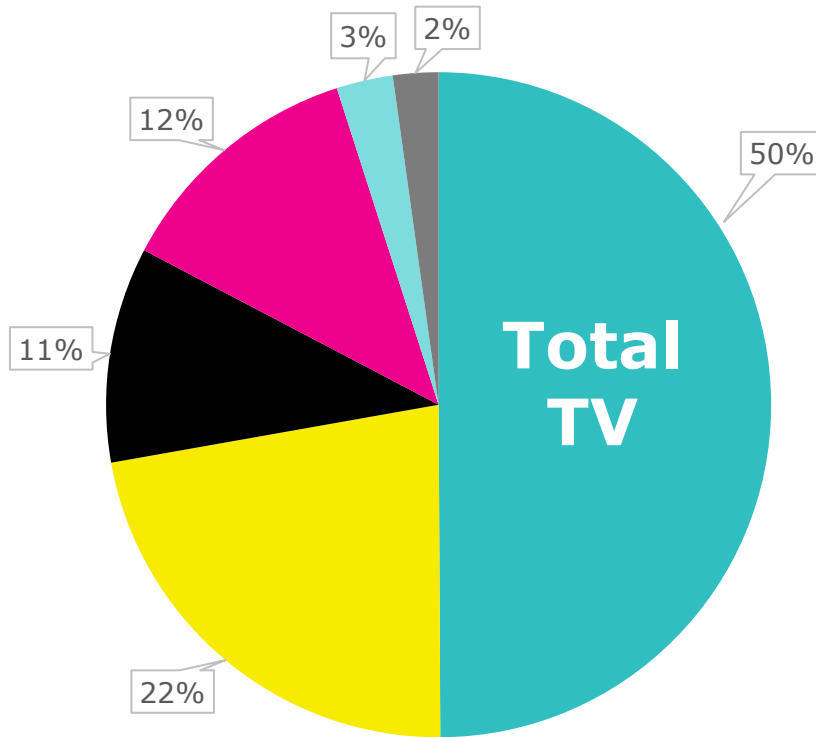


Source: Numeris VAM 09/16/24 to 12/15/24, Ontario, all time spent per capita  
Total TV defined as linear TV and broadcaster streaming services | Streaming Services are ad-free and ad-supported services (in-home viewing only)  
Other Streaming Services: AppleTV+, CBS News, Club Illico, Crave (OTT Only), Crunchyroll, Daily Motion, DAZN, Discovery Plus, ET Online US, FuboTV, Paramount+, Pluto TV, Roku Channel, Samsung TV Plus, TED, TubiTV



# ...across key demos

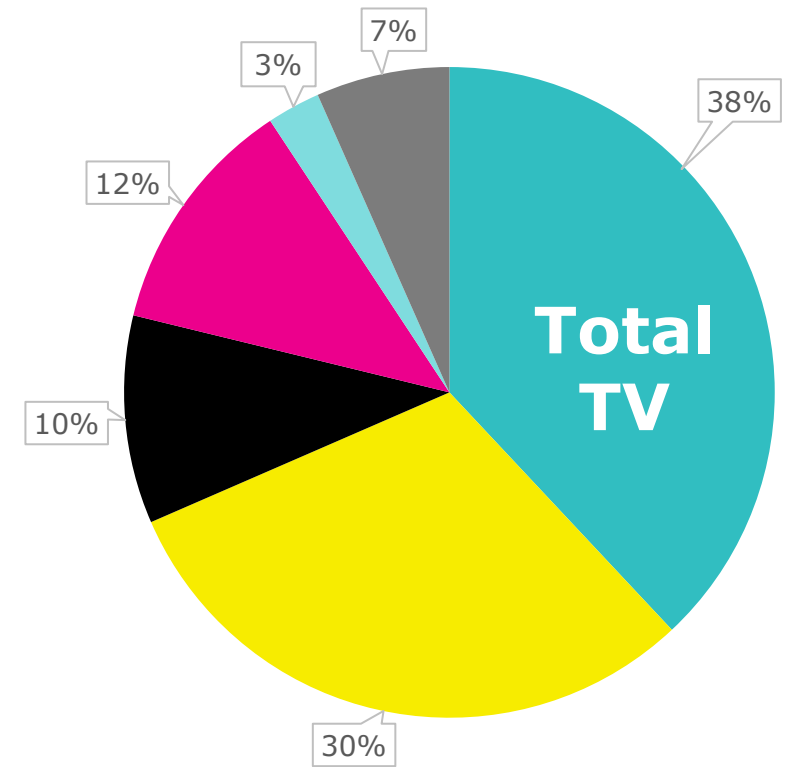
## ADULTS 25-54



## SHARE OF VIDEO ONTARIO

- Total TV
- YouTube
- Netflix
- Prime Video
- Disney+
- Other Streaming Services

## ADULTS 18-34



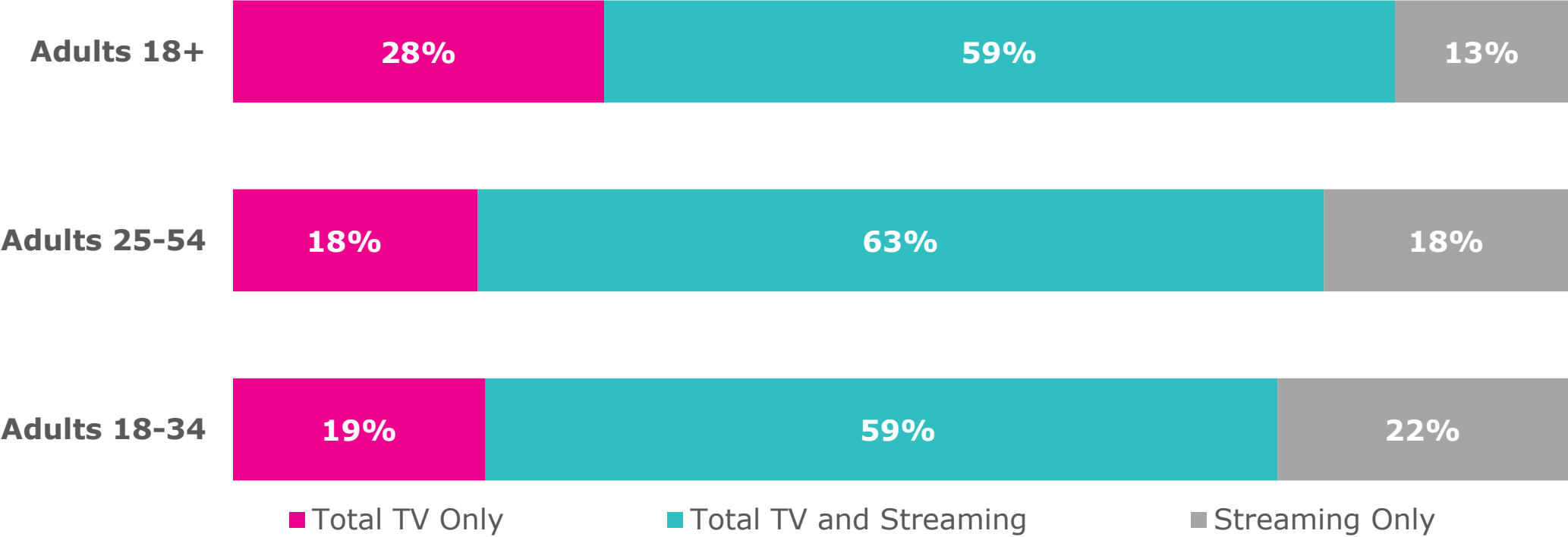
Source: Numeris VAM 09/16/24 to 12/15/24, Ontario, all time spent per capita

Total TV defined as linear TV and broadcaster streaming services | Streaming Services are ad-free and ad-supported services (in-home viewing only)

Other Streaming Services: 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

# most Canadians are watching *both* Total TV and streaming services

## % OF VIEWERS



Source: Numeris VAM Numeris VAM 09/16/24 to 12/15/24, Ontario, % of composition of average weekly reach | Total TV = Linear and broadcaster streaming services  
Streaming Services include: Prime Video, Netflix, Disney+, Apple TV+, Crave (OTT only), CBS News, Twitch TV, ET Online US, TubiTV DAZN, Paramount+, PlutoTV, FuboTV, Daily Motion, Roku Channel, Crunchyroll, Discovery+, TED, SamsungTV, YouTube

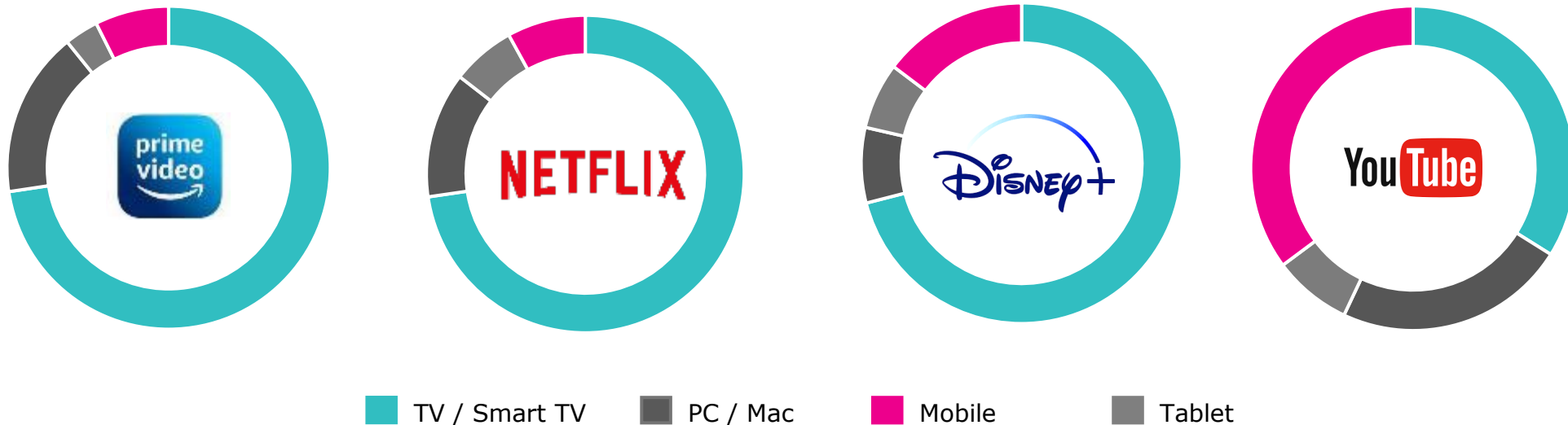
# big screen, big attention

TV screens are the preferred viewing platforms for both linear TV and streaming

why it matters: Ads viewed on TV screens are more impactful with recall rates 34% higher than computer screens and 60% higher than mobile devices

## SHARE % OF TOTAL TUNING BY DEVICE

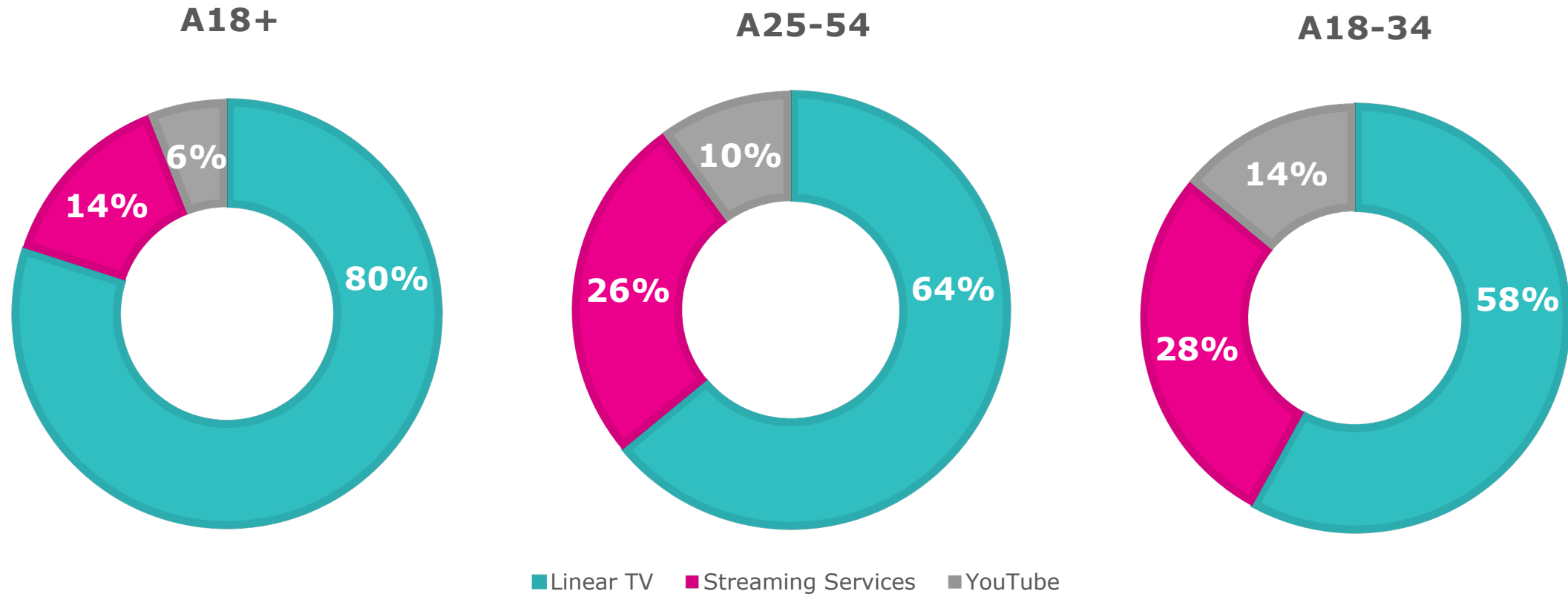
ONTARIO



Source: Numeris VAM, 09/16/24 to 12/15/24 | Ontario, Adults 18+ | Streaming Services, YouTube includes in-home viewing only  
Source: thinkbox, "Room with the viewers: why advertising thrives in the living room", March 2024

# big screen, big attention

linear TV dominates big-screen viewing for key audience segments



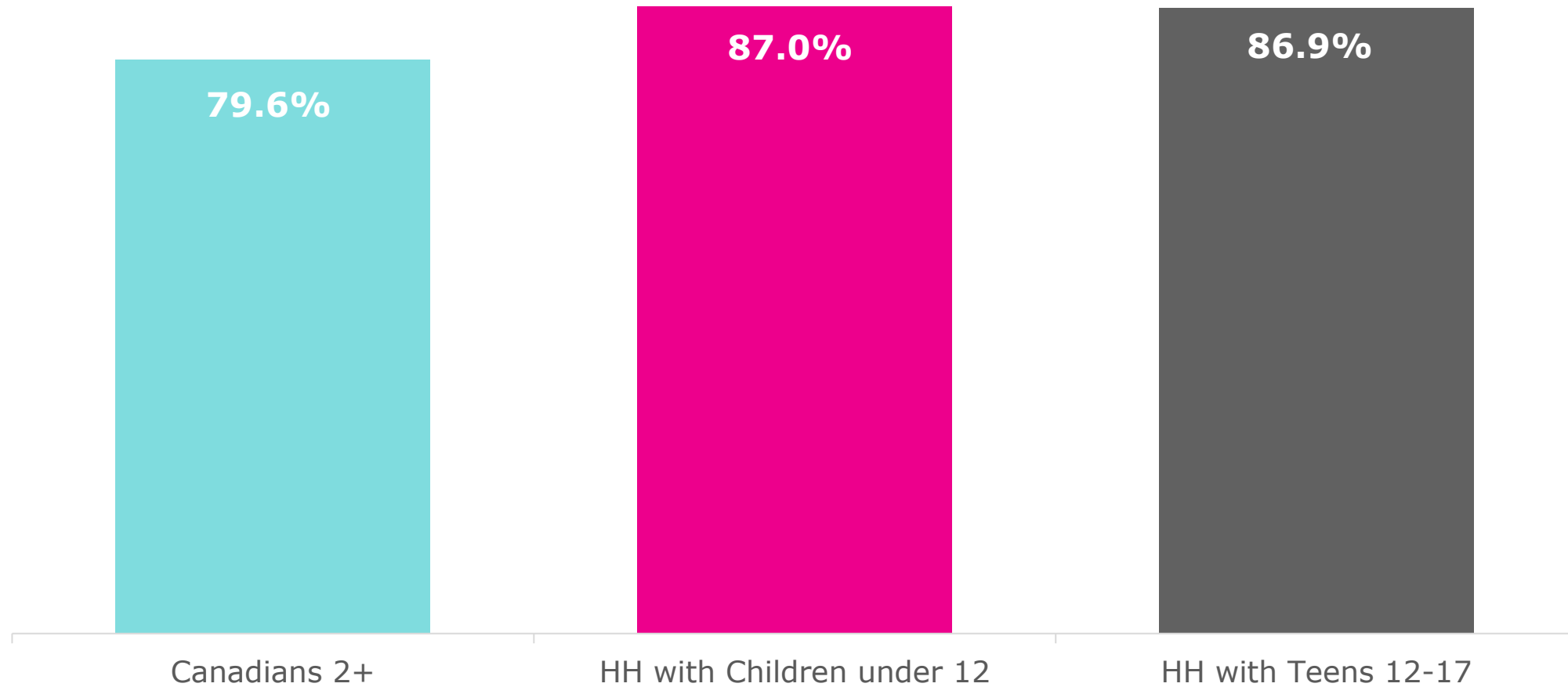
Note: Streaming Services include ad-free and ad-supported services

Source: Numeris VAM, 09/16/24 to 12/15/24, Ontario | Total Time (hours) on a TV / Smart TV device. Excludes Facebook Video, Instagram Reels, TikTok; Streaming Services include broadcaster streaming services



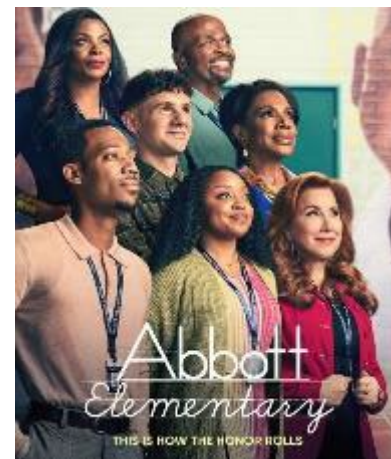
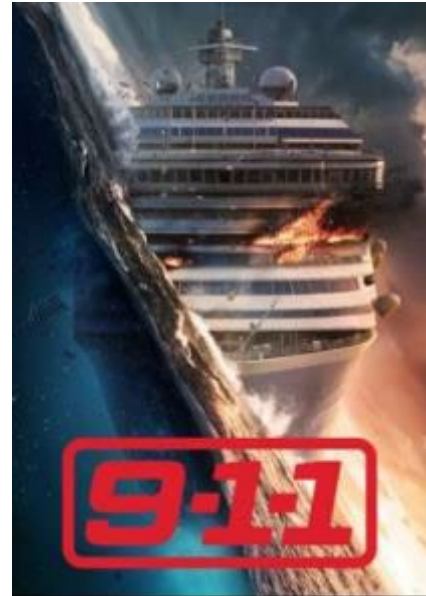
# four out of five Canadian homes enjoy Smart TVs

in households with children or young people, ownership increases



Source: Numeris PPM, Total Canada, 09/16/24 to 12/15/24

# what are Canadians watching?



# top 10 **tv** sports, Fall 2024 (English)

ADULTS 18+	Channel	AMA (000)
CFL GREY CUP	TSN and CTV	3,152
HNIC PRIME EAST	Rogers Sports Network	1,379
CFL PLAYOFFS	TSN and CTV	1,024
NFL THURSDAY FOOTBALL	TSN and CTV	832
HNIC PRIME WEST	Rogers Sports Network	708
NHL LEAFS HOCKEY	TSN	602
NFL MONDAY FOOTBALL	TSN	595
NFL BLACK FRIDAY	TSN and CTV	573
HOCKEYCENTRAL SAT	Rogers Sports Network	509
CFL FOOTBALL	TSN	432

ADULTS 25-54	Channel	AMA (000)
CFL GREY CUP	TSN and CTV	1,068
HNIC PRIME EAST	Rogers Sports Network	562
NFL THURSDAY FOOTBALL	TSN and CTV	386
CFL PLAYOFFS	TSN and CTV	344
HNIC PRIME WEST	Rogers Sports Network	297
NHL LEAFS HOCKEY	TSN	292
NFL MONDAY FOOTBALL	TSN	261
NFL BLACK FRIDAY	TSN and CTV	223
HOCKEYCENTRAL SAT	Rogers Sports Network	176
NFL THURSDAY FOOTBALL	TSN	175

ADULTS 18-34	Channel	AMA (000)
CFL GREY CUP	TSN and CTV	619
HNIC PRIME EAST	Rogers Sports Network	273
CFL PLAYOFFS	TSN and CTV	204
NFL THURSDAY FOOTBALL	TSN and CTV	199
NHL LEAFS HOCKEY	TSN	193
HNIC PRIME WEST	Rogers Sports Network	127
NFL MONDAY FOOTBALL	TSN	106
HOCKEYCENTRAL SAT	Rogers Sports Network	102
AUTO:FORMULA ONE	TSN	86
NFL THURSDAY FOOTBALL	TSN	84

Source: Numeris PPM Total Canada, 09/16/24 to 12/15/24, Sports, English networks, TSN and CTV if the game is simulcast

# top 10 **tv** shows, Fall 2024 (English)

ADULTS 18+	Channel	AMA (000)
<b>MATLOCK</b>	Global	<b>1,590</b>
<b>9-1-1</b>	Global	<b>1,456</b>
<b>9-1-1: LONE STAR</b>	CTV	<b>1,433</b>
<b>ELSBETH</b>	Global	<b>1,304</b>
<b>HIGH POTENTIAL</b>	CTV	<b>1,149</b>
<b>FBI</b>	Global	<b>1,091</b>
<b>RESCUE: HI-SURF</b>	CTV	<b>1,074</b>
<b>SURVIVOR</b>	Global	<b>1,059</b>
<b>FBI: MOST WANTED</b>	Global	<b>1,049</b>
<b>BLUE BLOODS</b>	CTV	<b>1,042</b>

ADULTS 25-54	Channel	AMA (000)
<b>9-1-1: LONE STAR</b>	CTV	<b>480</b>
<b>9-1-1</b>	Global	<b>463</b>
<b>RESCUE: HI-SURF</b>	CTV	<b>403</b>
<b>SURVIVOR</b>	Global	<b>363</b>
<b>BIG BROTHER</b>	Global	<b>350</b>
<b>SATURDAY NIGHT LIVE</b>	Global	<b>344</b>
<b>MATLOCK</b>	Global	<b>329</b>
<b>GHOSTS</b>	Global	<b>317</b>
<b>HIGH POTENTIAL</b>	CTV	<b>296</b>
<b>DOCTOR ODYSSEY</b>	CTV	<b>291</b>

ADULTS 18-34	Channel	AMA (000)
<b>9-1-1: LONE STAR</b>	CTV	<b>266</b>
<b>9-1-1</b>	Global	<b>255</b>
<b>BIG BROTHER</b>	Global	<b>188</b>
<b>RESCUE: HI-SURF</b>	CTV	<b>187</b>
<b>SURVIVOR</b>	Global	<b>177</b>
<b>SATURDAY NIGHT LIVE</b>	Global	<b>168</b>
<b>ABBOTT ELEMENTARY</b>	Global	<b>150</b>
<b>MATLOCK</b>	Global	<b>140</b>
<b>BIG BROTHER</b>	Global	<b>133</b>
<b>Law &amp; Order: Special Victims Unit</b>	Citytv	<b>130</b>

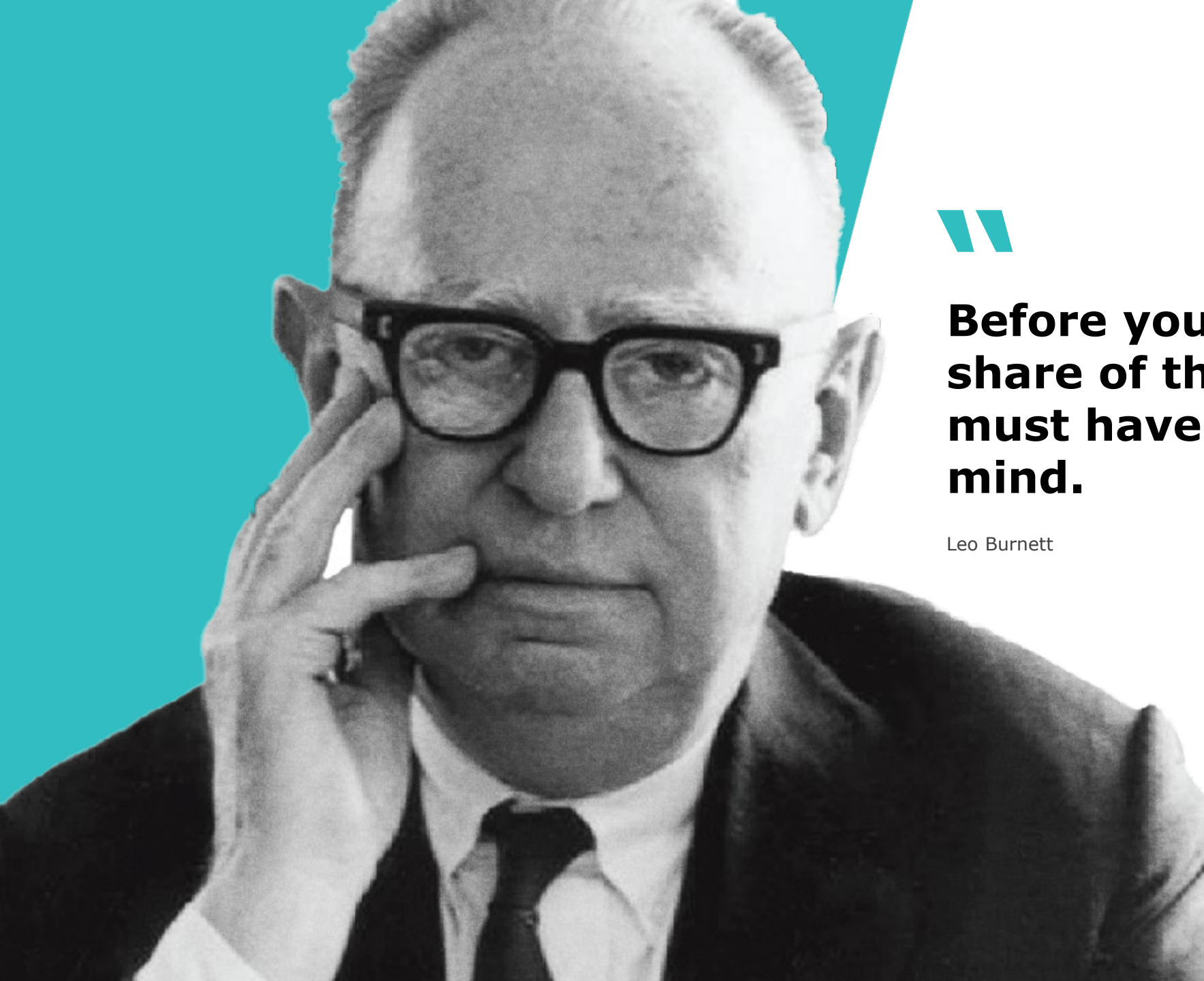


A man and a woman are sitting together in a living room, looking at a tablet and a smartphone. The man is holding the tablet, and the woman is holding the smartphone. They are both smiling and looking at the devices. The background shows a blurred living room with a sofa and a painting.

# impact

**TV advertising  
wins in both  
audience  
attention and  
influential impact**

think<sup>tv</sup>






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

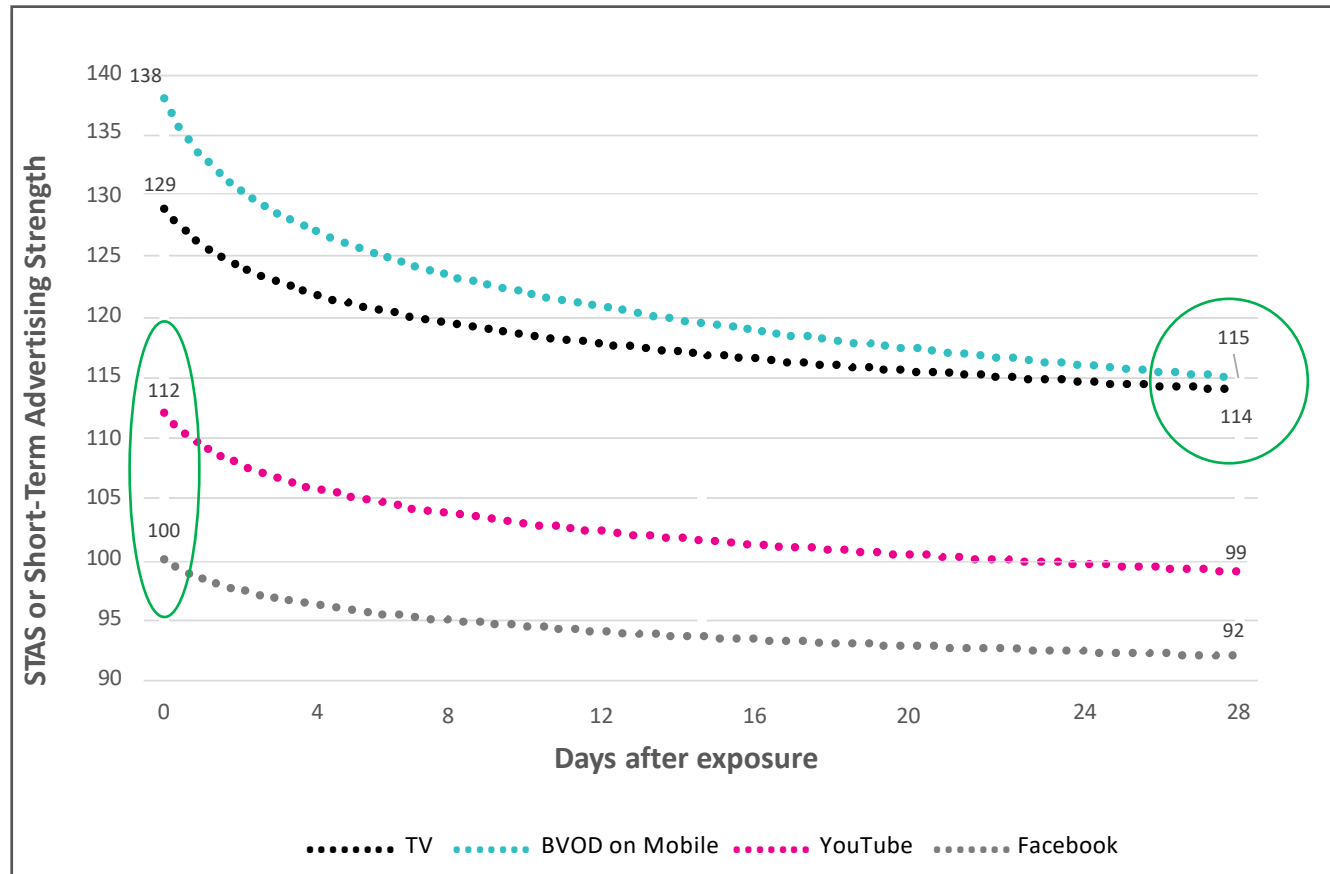
Leo Burnett

# tv commands more attention

with active viewing almost double that of YouTube and over 14 times higher than Facebook, TV delivers superior audience attention

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

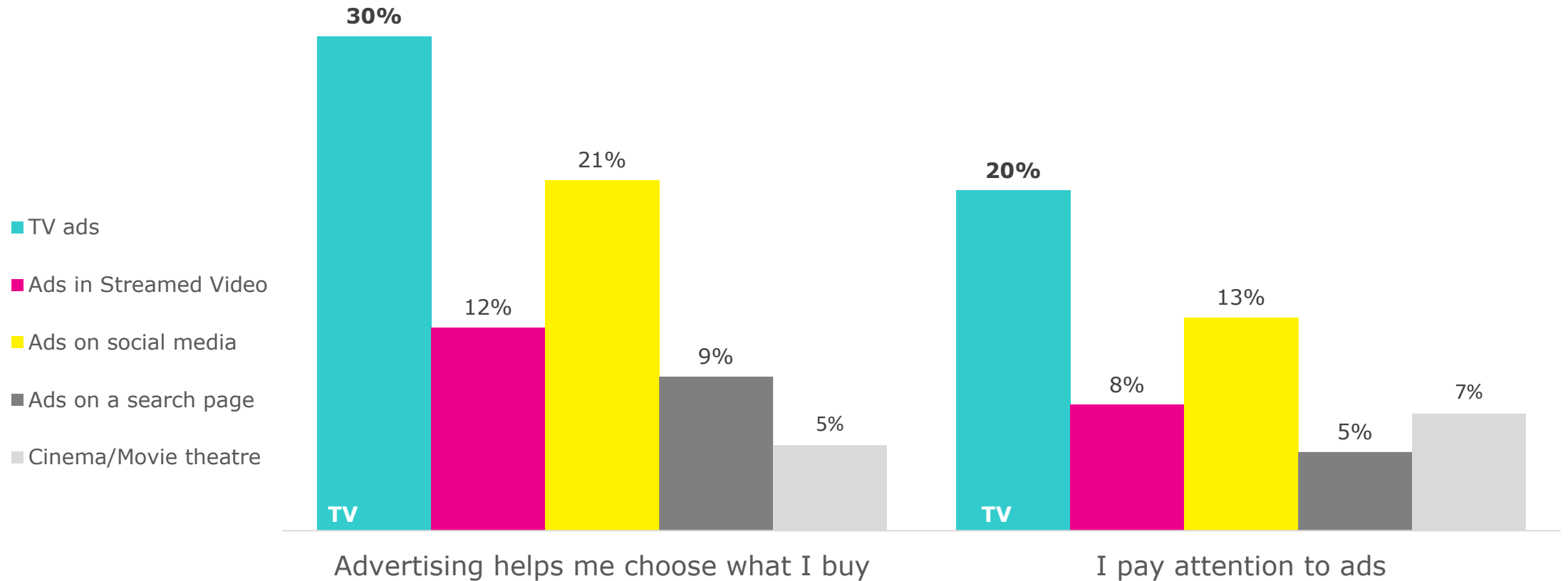
# tv ads impact sales far longer



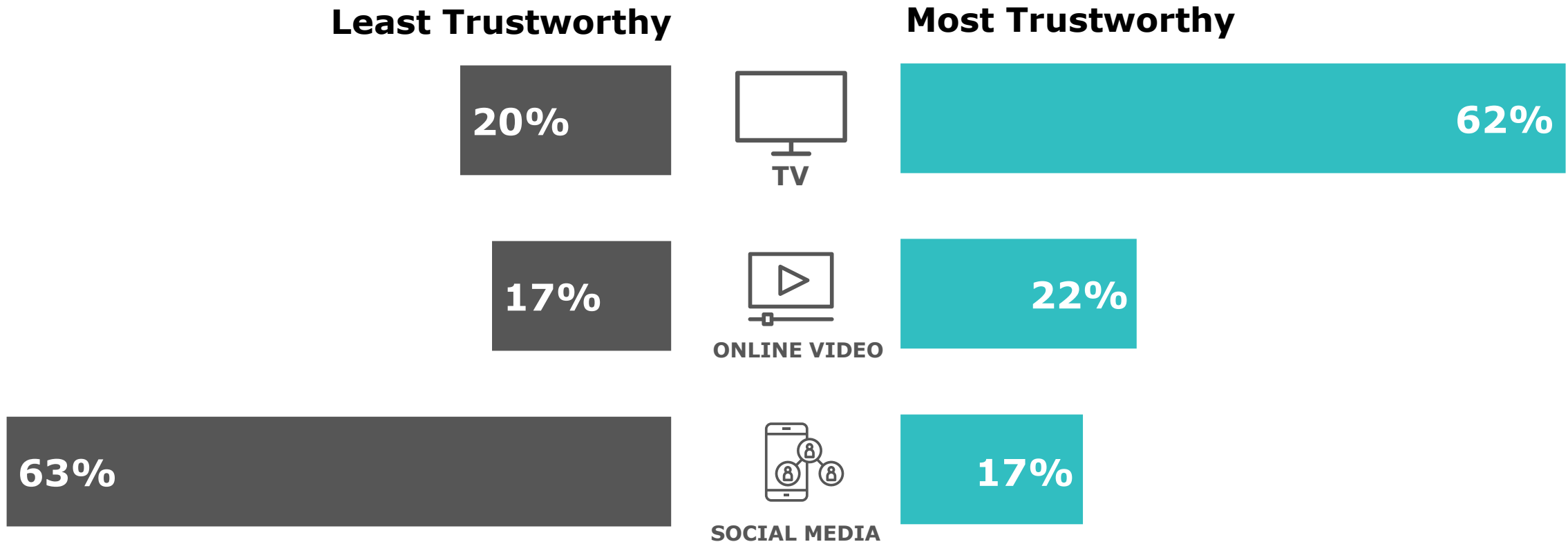
TV and BVOD advertising generates a greater impact at 28 days after exposure than either of Facebook or YouTube **immediately** after exposure.



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



# tv is the most trustworthy medium for Canadians while social is the least



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

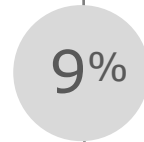
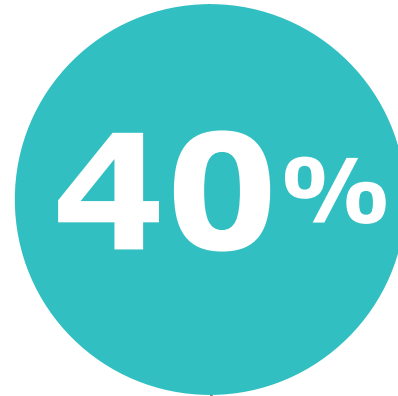
# tv advertising is most likely to draw attention and stay in viewers' memories

Sticks in your memory

Draws your attention to a product/brand you hadn't heard of



TV



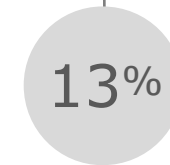
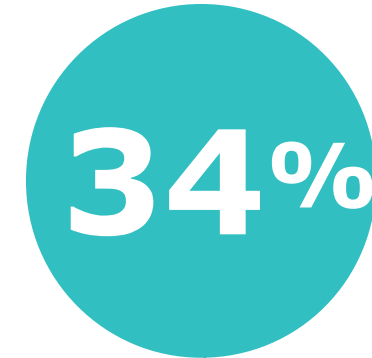
YOUTUBE

(second highest)



SOCIAL MEDIA

(second highest)



*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 people laugh

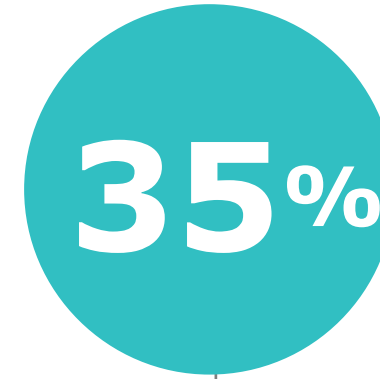
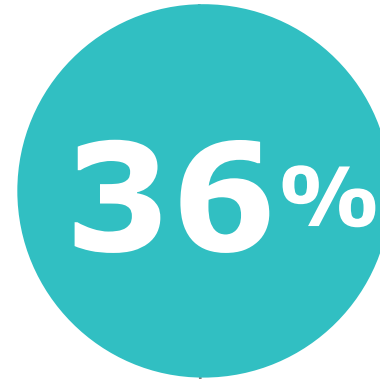
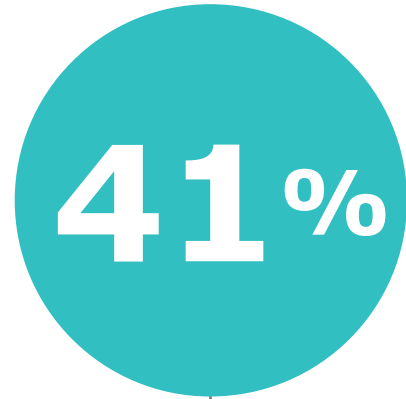
Makes you laugh

You like

Makes you feel emotional

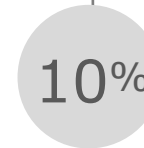
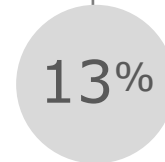
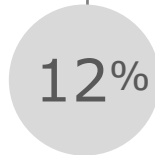


TV



YOUTUBE

(second highest)



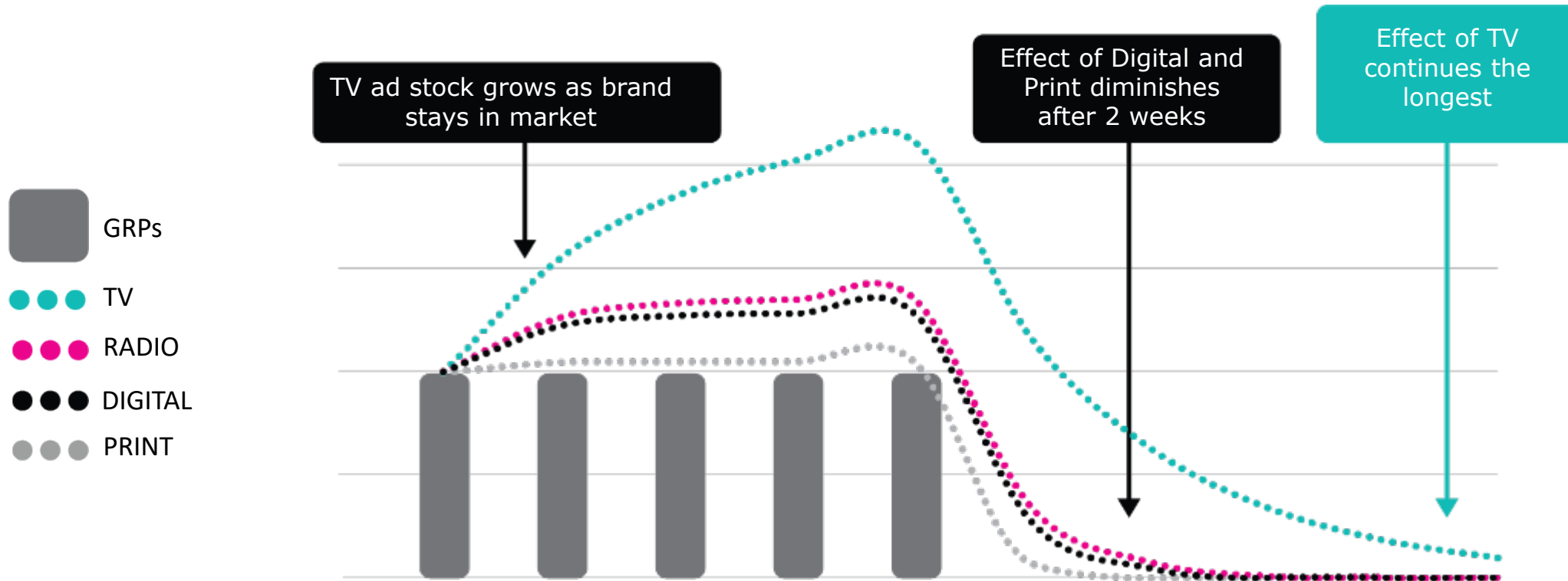
SOCIAL MEDIA

(second highest)

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

# tv ads deliver the greatest impact

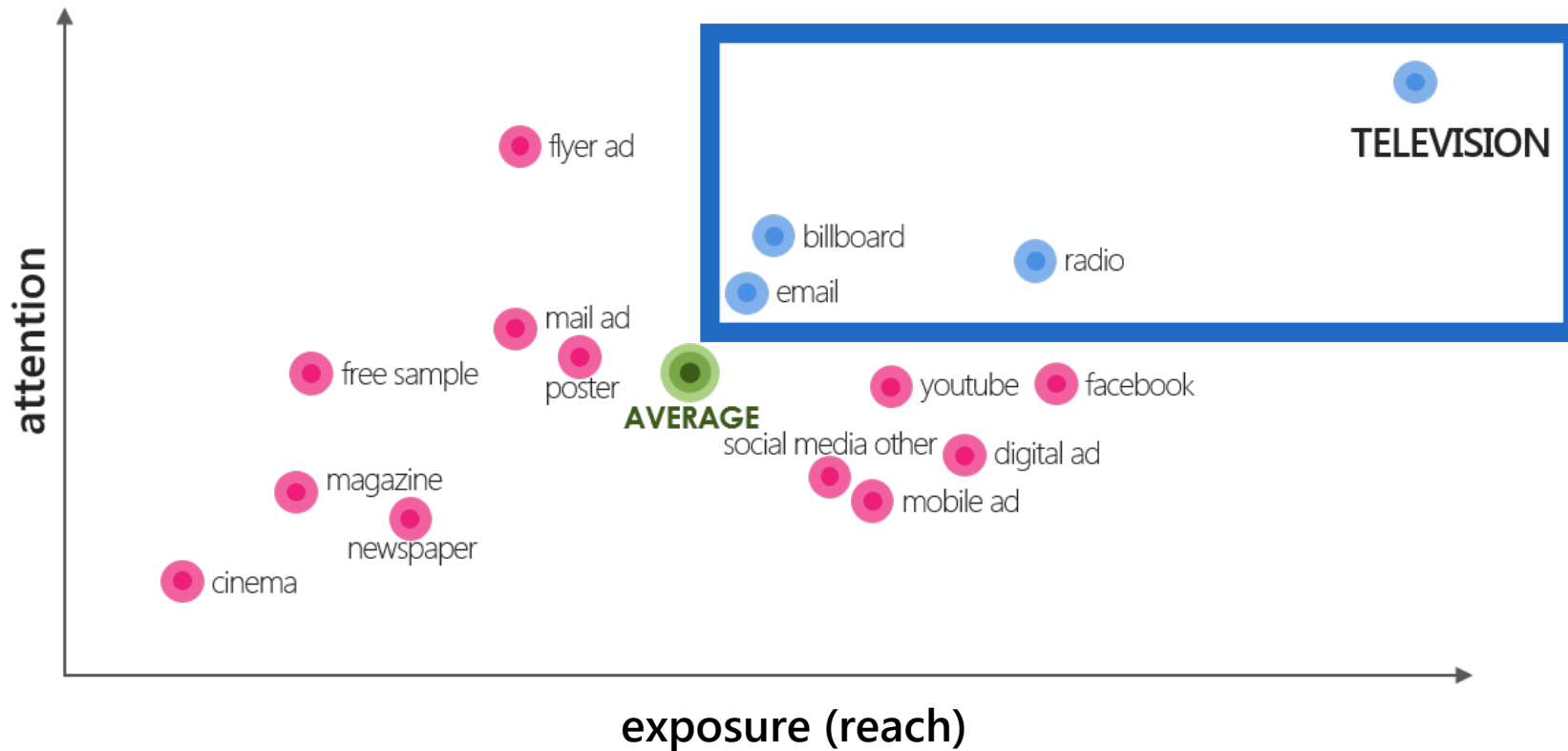
TV's ad stock grows the fastest and lasts the longest



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

# tv leads in exposure and attention

each medium delivers a combination of exposure (reach) and consumer attention  
TV delivers the highest exposure through its mass reach while capturing the greatest consumer attention



# demand

**TV drives consumer action**



think<sup>tv</sup>



# tv works throughout the funnel

TV is the 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
- Viewers purchase products and services *while* watching the TV commercial



# tv delivers more sales uplift

no matter the device, TV drives more sales uplift than any other platform

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

STAS = Short Term Advertising Strength

STAS is defined as the likelihood of a brand being **spontaneously** considered at a purchase occasion.

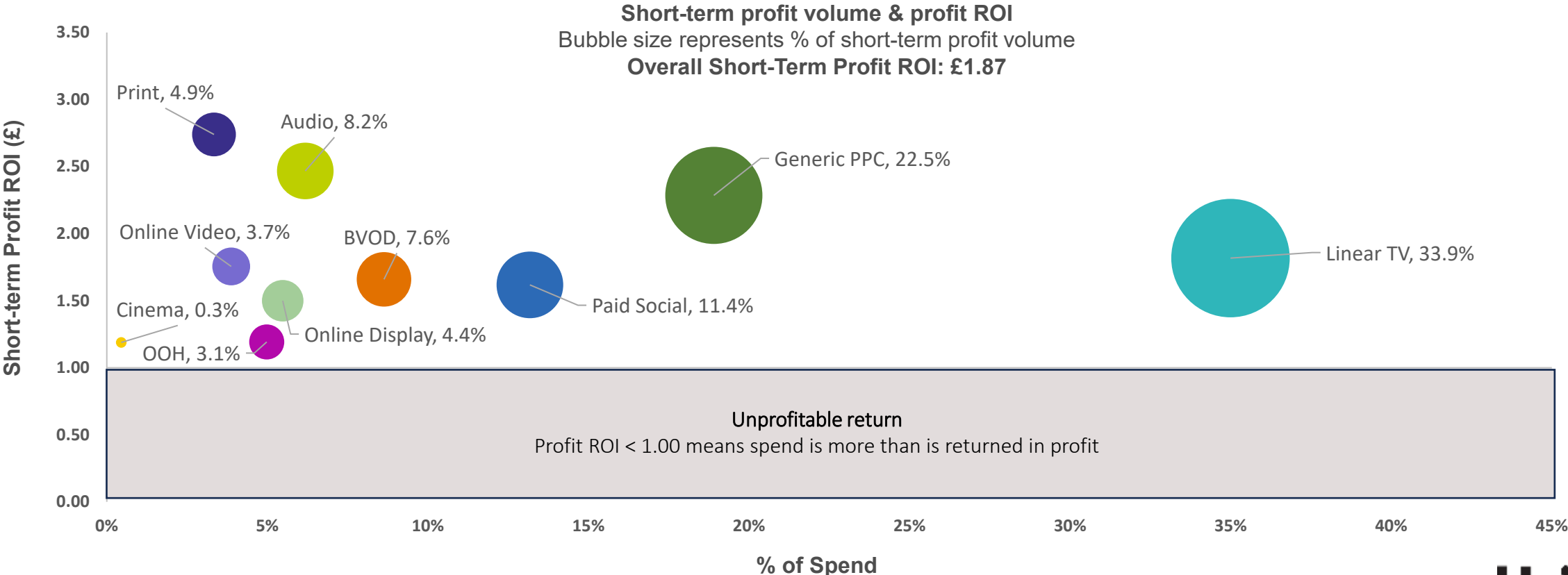
# efficiency

**TV delivers the highest ROI**



# channels deliver, on average, a profit return of £1.87 in the short term (weeks 1-13)

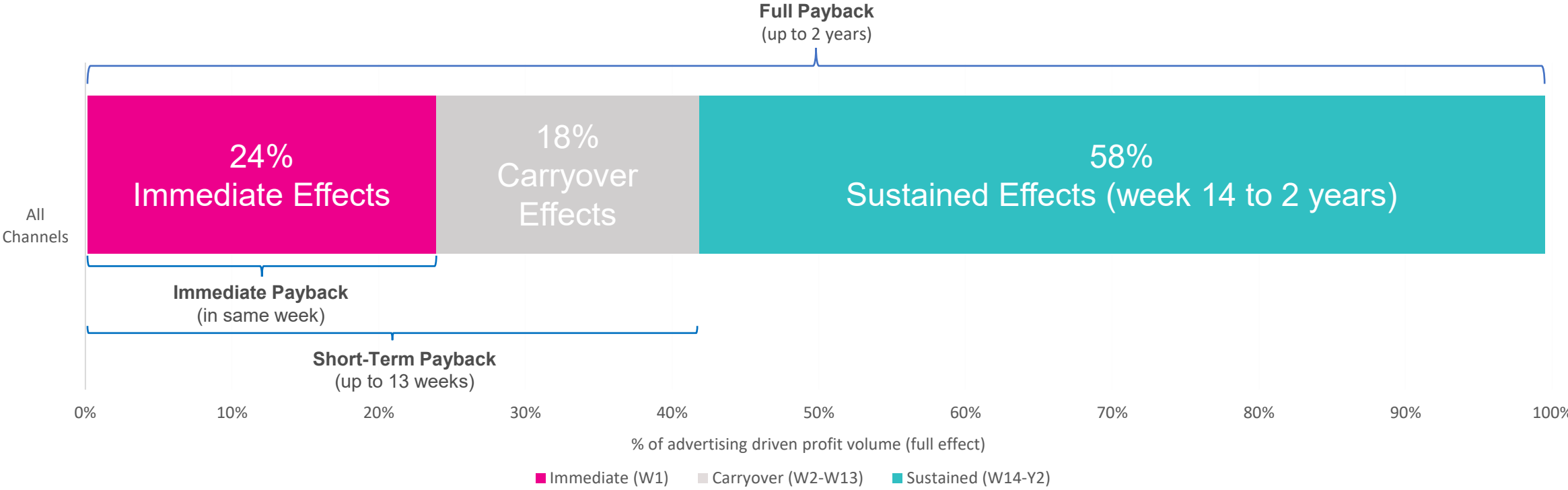
the below media channel profitability chart maps ad spend (x axis) and profit ROI (y axis) bubble size represents percentage of profit volume & channels above the ROI=1 line deliver positive returns



Source: [Profit Ability 2](#), April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.  
 Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK  
**Profit Volume** is the incremental contribution of advertising to business profit based on unit sales, revenue contribution, profit margin and/or lifetime value.  
**Profit ROI** is the ratio between profit volume and advertising spend (ROI = Profit Volume / media spend where 1 = breakeven)



# but the full payback of advertising investment happens over the long term (up to 2 years)



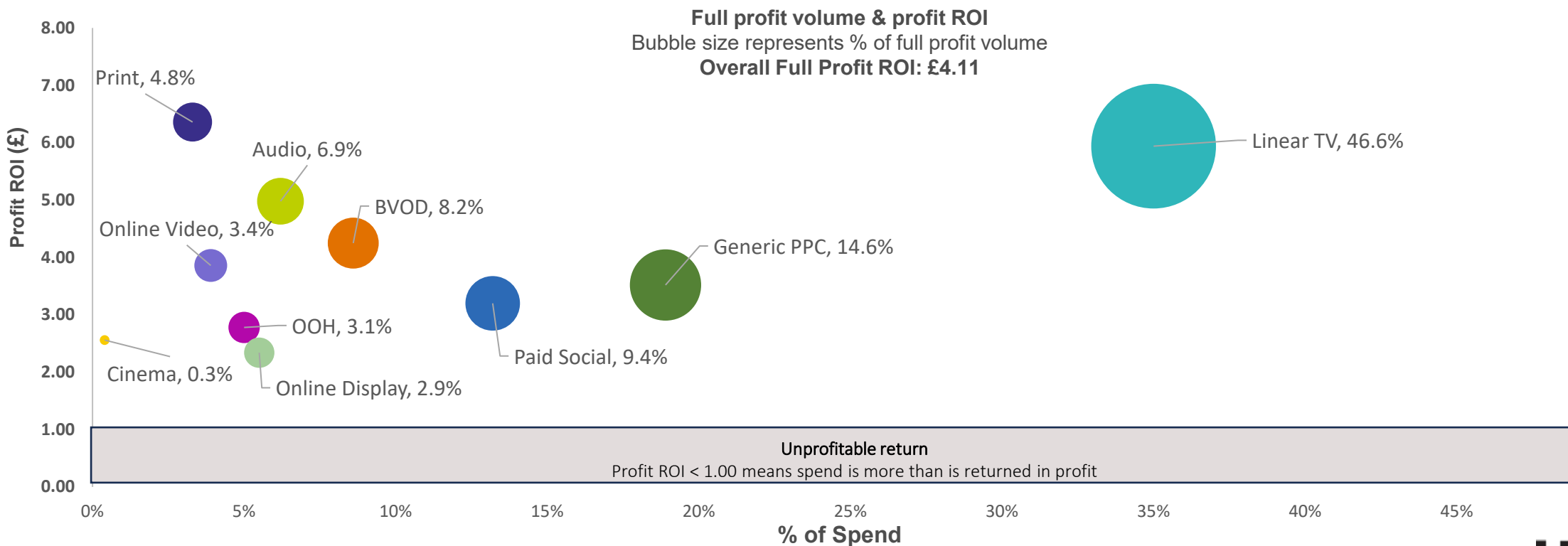
Source: [Profit Ability 2](#), April 2024 – Short term benchmarks: Ebiquty, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK. Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK



# tv advertising is the greatest driver of overall profit volume

advertising's overall ROI increases from £1.87 to £4.11 over the long term

linear TV delivers an exceptional ROI of £5.94 and unmatched profit volume, contributing 47% of total ad-generated profits on only 35% of total advertising spend



Source: [Profit Ability 2](#), April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.

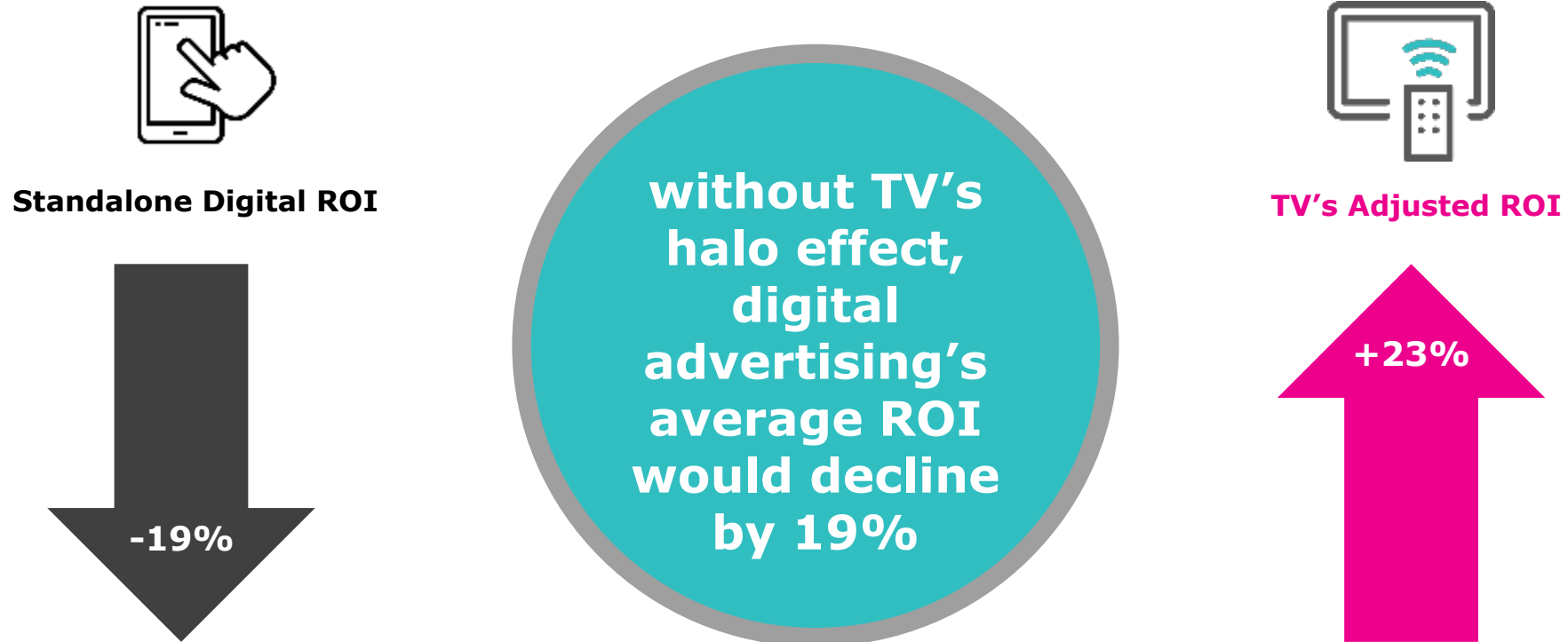
Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK

**Profit Volume** is the incremental contribution of advertising to business profit based on unit sales, revenue contribution, profit margin and/or lifetime value.

**Profit ROI** is the ratio between profit volume and advertising spend (ROI = Profit Volume / media spend where 1 = breakeven)

# tv improves digital's performance

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







**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, Consultant, Columnist, 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 at both ends of the funnel



**TV** delivers one of the strongest ROI's and is the largest contributor of ad profit

# in case you missed it

check out these additional research reports

## profit ability 2: the new business case for advertising

Rupen Shah, Head of Client Services at Thinkbox, shared their latest econometric research, Profit Ability 2, one of the best econometric studies we've seen.

[learn more »](#)

## 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 »](#)

## 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 several brand metrics, like Awareness, Consideration and Value.

[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 »](#)

## target the (whole) market

Byron Sharp famously challenged a number of traditionally held beliefs in his groundbreaking 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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**[info@thinktv.ca](mailto:info@thinktv.ca)**

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