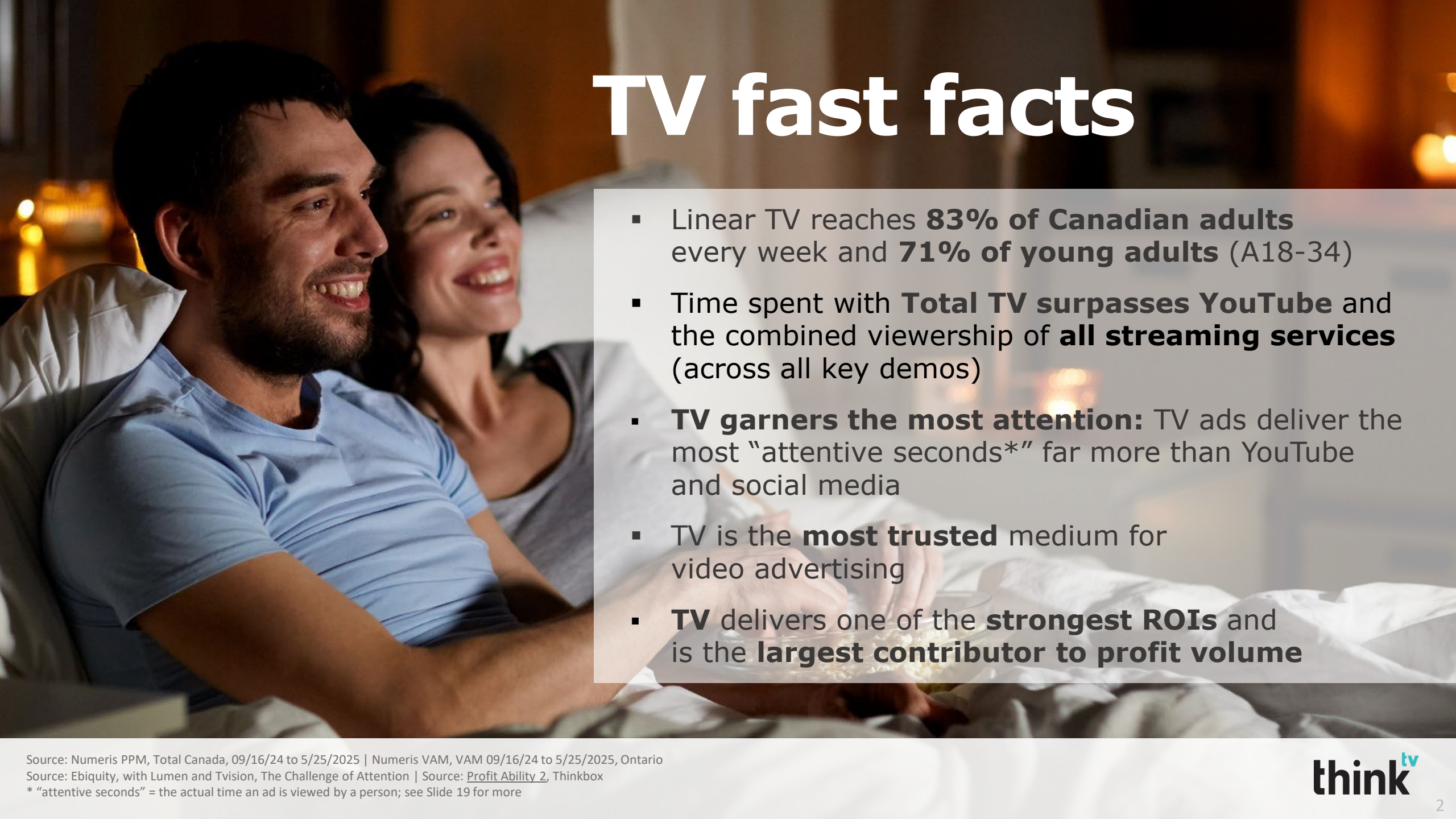


the power of TV

in an attention economy

think^{tv}





TV fast facts

- Linear TV reaches **83% of Canadian adults** every week and **71% of young adults (A18-34)**
- Time spent with **Total TV surpasses YouTube** and the combined viewership of **all streaming services** (across all key demos)
- **TV garners the most attention:** TV ads deliver the most “attentive seconds*” far more than YouTube and social media
- TV is the **most trusted** medium for video advertising
- **TV** delivers one of the **strongest ROIs** and is the **largest contributor to profit volume**

Source: Numeris PPM, Total Canada, 09/16/24 to 5/25/2025 | Numeris VAM, VAM 09/16/24 to 5/25/2025, Ontario

Source: Ebiquity, with Lumen and Tvision, The Challenge of Attention | Source: [Profit Ability 2](#), Thinkbox

* “attentive seconds” = the actual time an ad is viewed by a person; see Slide 19 for more

TV drives results because it delivers

➡ REACH

➡ IMPACT

➡ EFFICIENCY



A man and a woman are sitting on a couch, smiling and watching TV. The man is holding a red mug and a remote control. The woman is also holding a red mug. They are both looking towards the left side of the frame, presumably where a television is located. The background is a simple, modern living room with a lamp and a plant visible.

➡ REACH

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



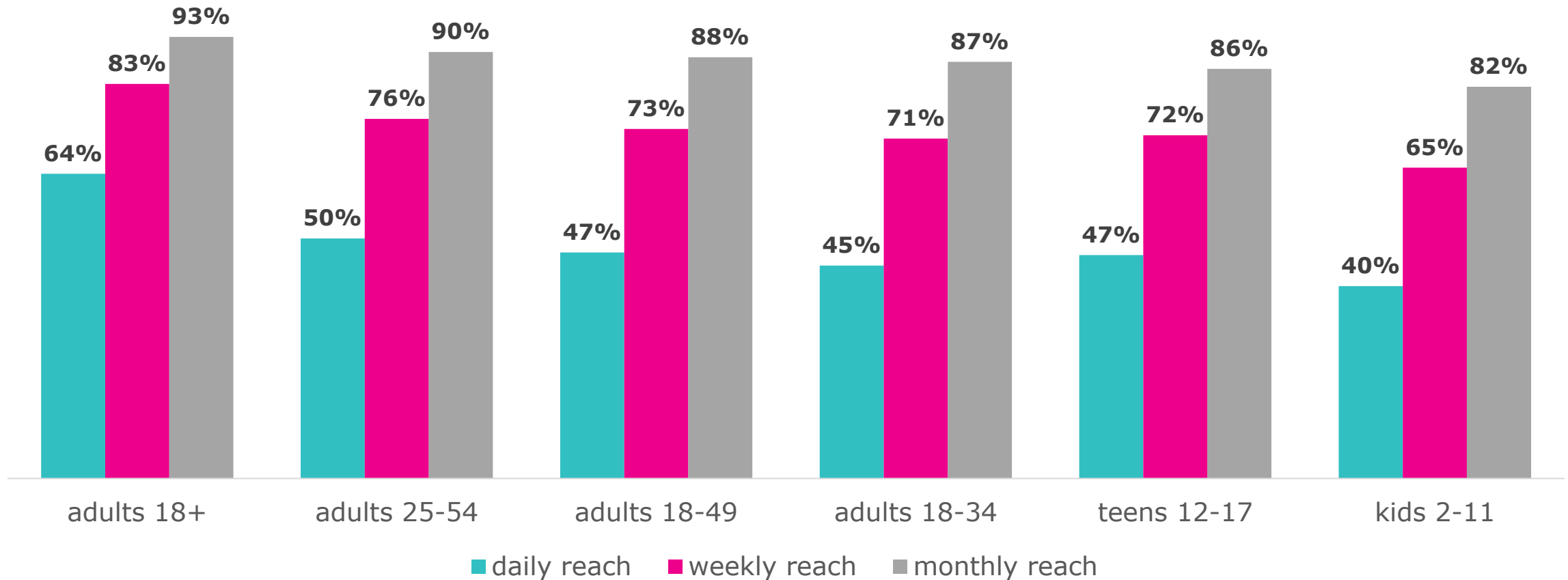
“Marketing activities only build mental availability in the audience they reach.”

This makes planning for reach the foundation of any sound media strategy.”

Byron Sharp

Professor of Marketing Science,
University of South Australia

linear TV reaches **93%** of Canadians (A18+) monthly



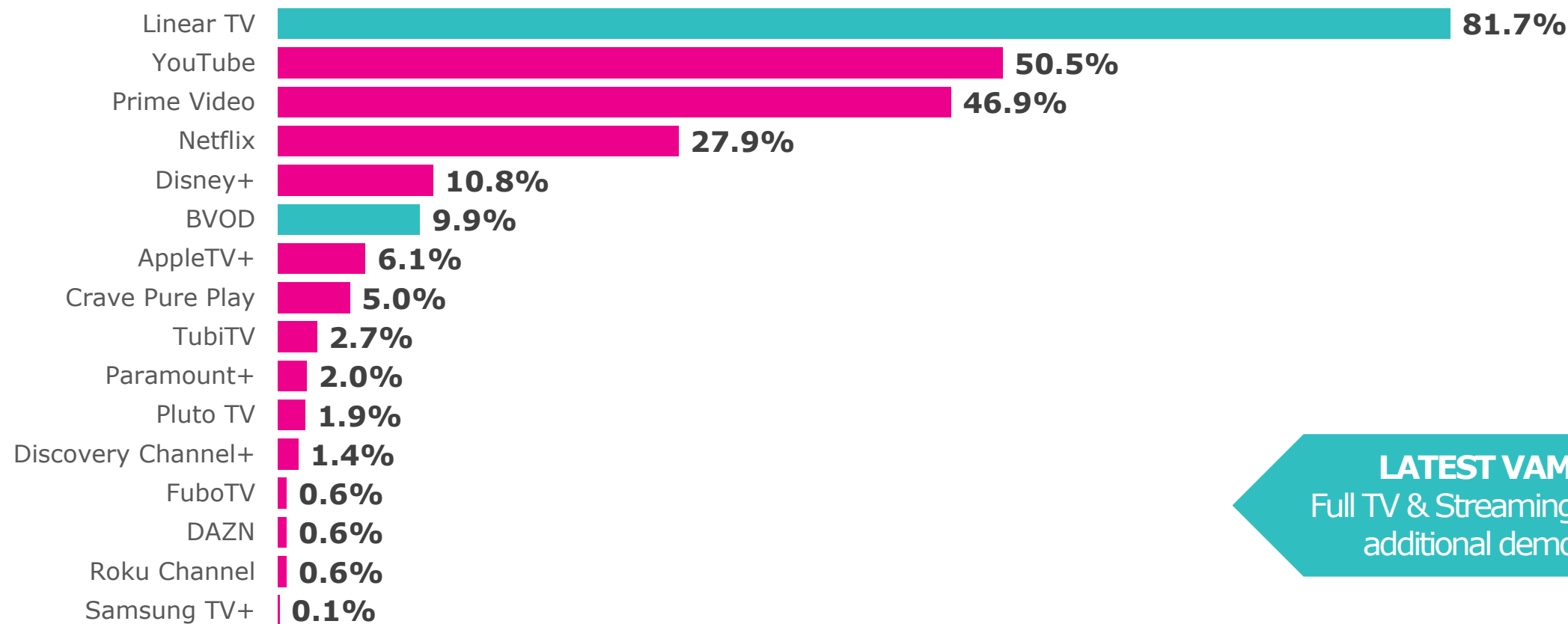
Source: Numeris PPM, Total Canada, 09/16/24 to 5/25/2025

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.

linear TV's reach exceeds all streaming services

AVERAGE WEEKLY REACH %

ADULTS 18+ | ONTARIO

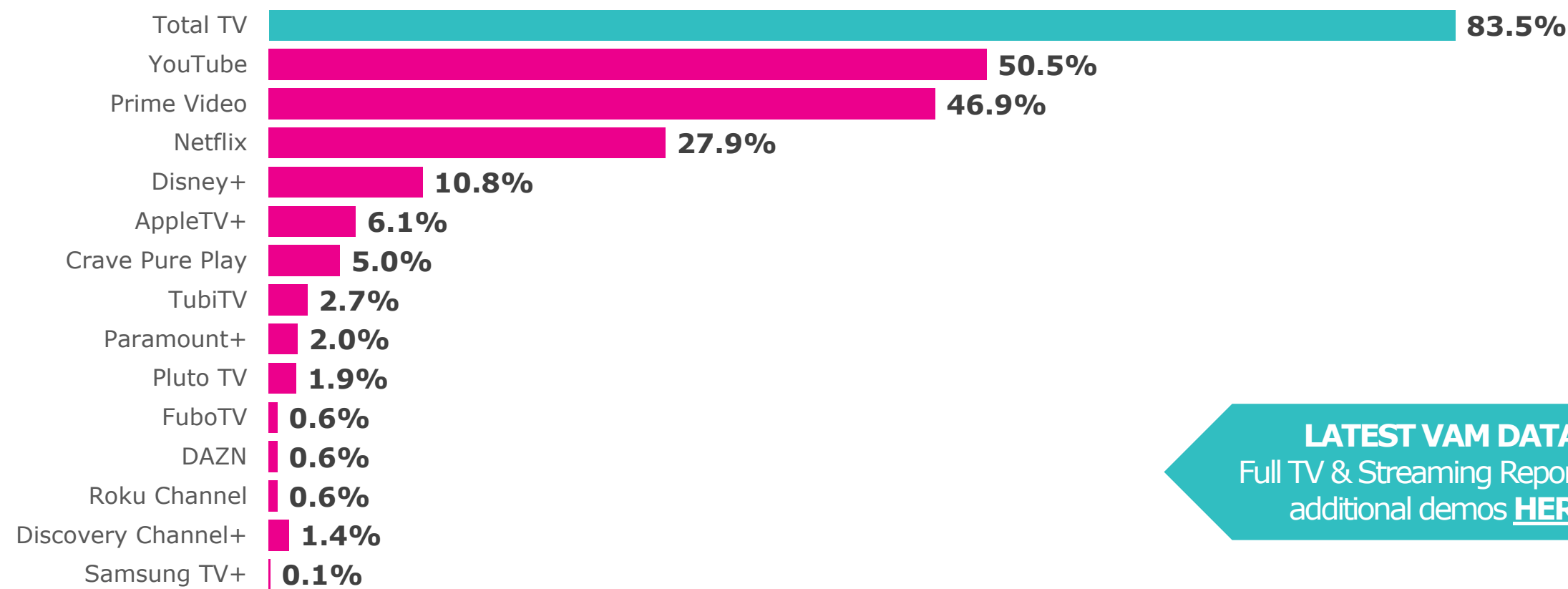


LATEST VAM DATA
Full TV & Streaming Report with
additional demos [HERE](#)

Source: Numeris VAM 09/16/24 to 5/25/2025, Ontario
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 delivers unmatched reach

AVERAGE WEEKLY REACH %
ADULTS 18+ | ONTARIO



LATEST VAM DATA
Full TV & Streaming Report with
additional demos [HERE](#)

Source: Numeris VAM 09/16/24 to 5/25/2025, Ontario
Total TV defined as linear TV and broadcaster streaming services | Streaming Services are ad-free and ad-supported services (in-home viewing only)

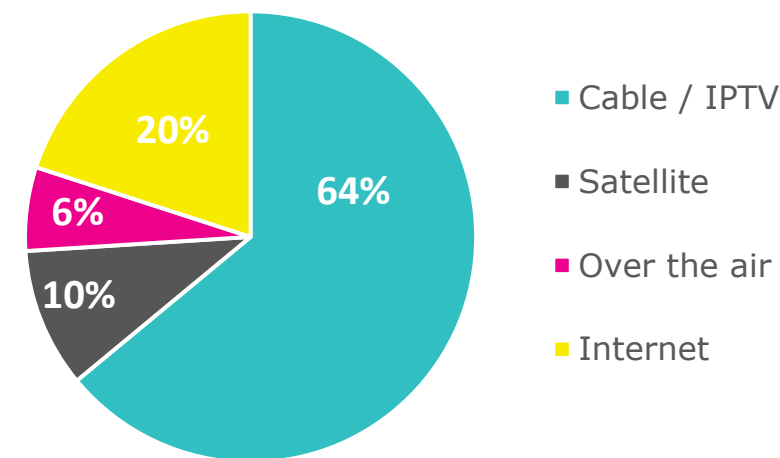
access to TV is almost universal

ACCESS TO LINEAR TV

nearly all Canadians have access to linear TV*, either through paid TV services (cable / IPTV) or via streaming on the internet

PAID TV SUBSCRIPTIONS

while household penetration of paid TV subscriptions remains strong in Canada, declining just 3% year-over-year, anyone with an internet connection has access to linear TV content

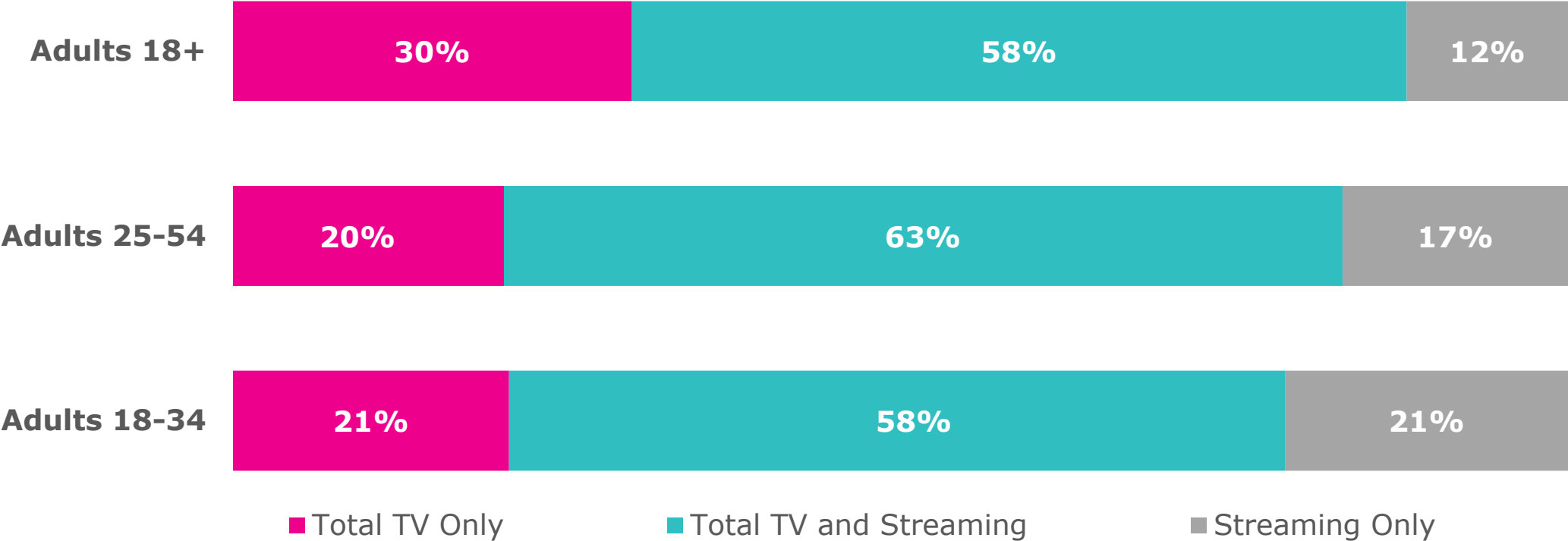


	January '24	January '25	Index (YOY)
TOTAL PAID SUBS	9,725,802	9,440,222	(2.9%)
Basic/Digital Cable	4,648,356	4,392,375	(5.5%)
Satellite	1,363,613	1,167,493	(14.4%)
Telco/IPTV (Internet Protocol TV)	3,556,771	3,824,969	+4.5%
Other	23,473	22,845	(2.7%)

Source: Numeris Universe Estimates: * Sept 2024 Reception Type Update - PPM TV Panels, Total Canada, persons 2+
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

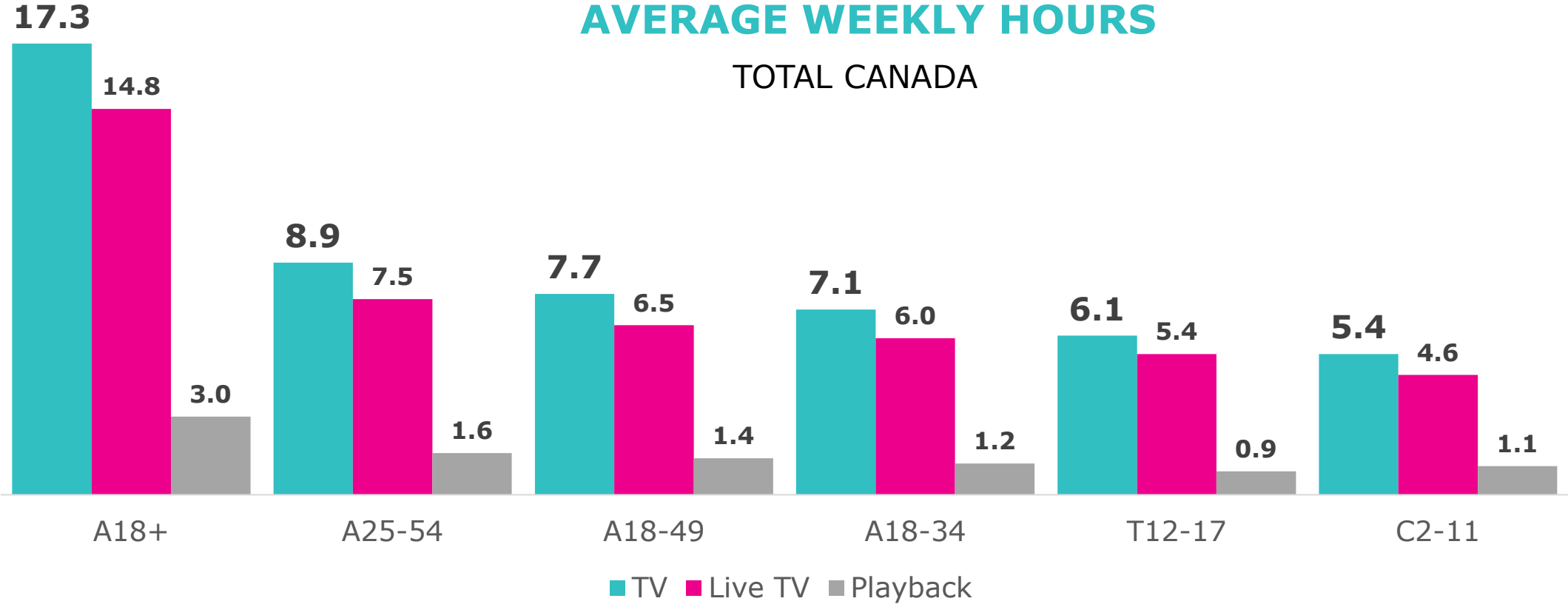
most Canadians are *watching both* Total TV and streaming services

% OF VIEWERS



Source: Numeris VAM 09/16/24 to 5/25/2025, 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

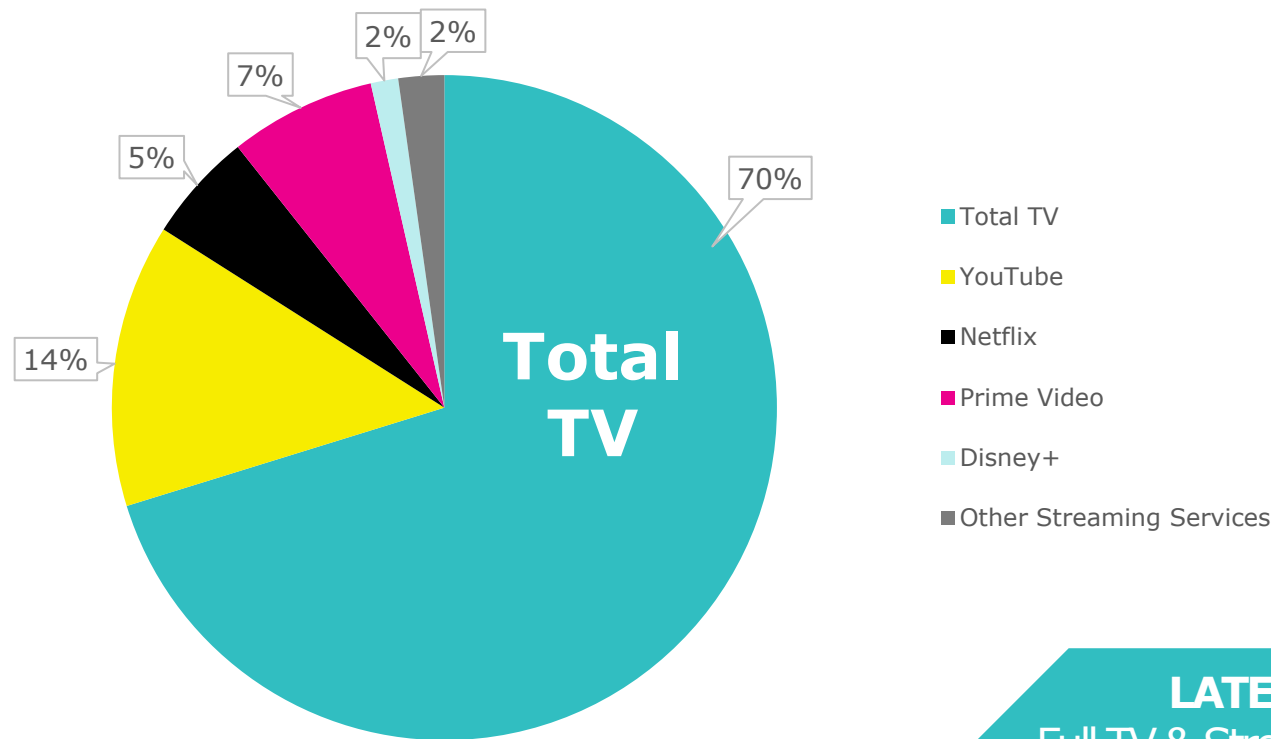
Canadians watch a lot of linear TV and **most** of it is **live**



Source: Numeris, Total Canada, 09/16/24 to 05/25/25, 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.

Total TV: captures **greatest share** of time spent with video

SHARE OF VIDEO
ADULTS 18+ | ONTARIO

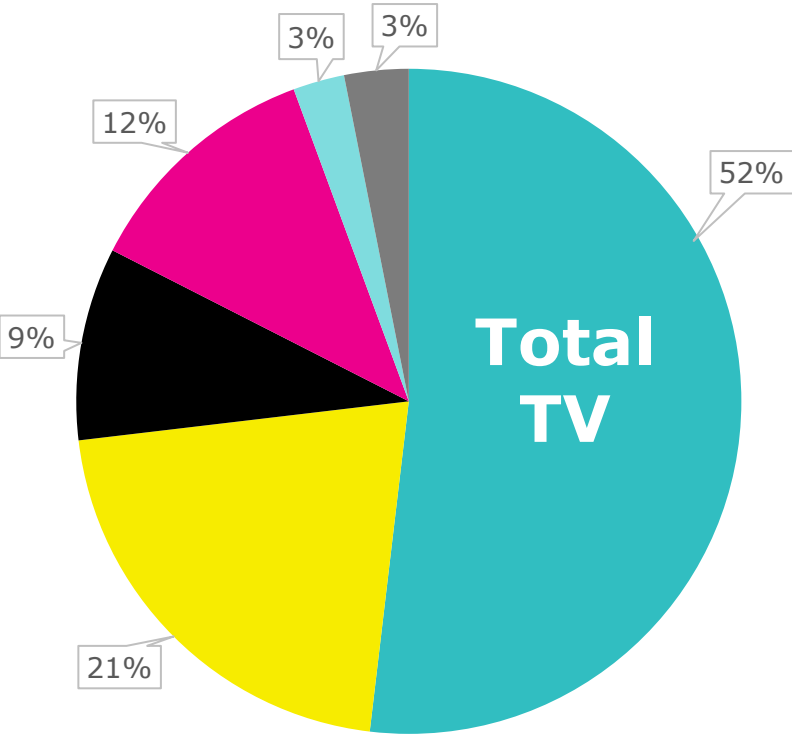


LATEST VAM DATA
Full TV & Streaming Report Available
[HERE](#)

Source: Numeris VAM 09/16/24 to 5/25/2025, 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

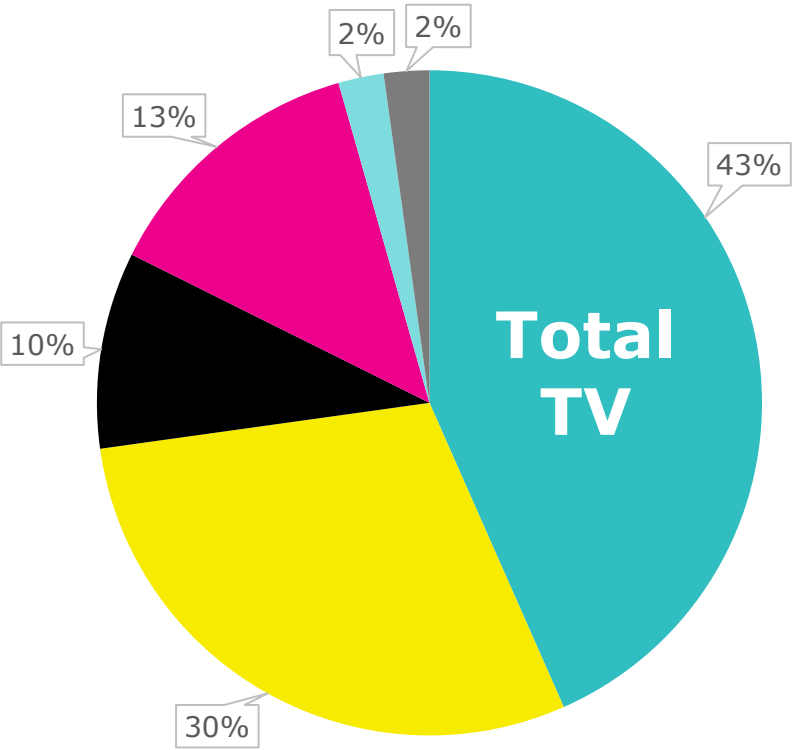
ADULTS 25-54



SHARE OF VIDEO
ONTARIO

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

ADULTS 18-34

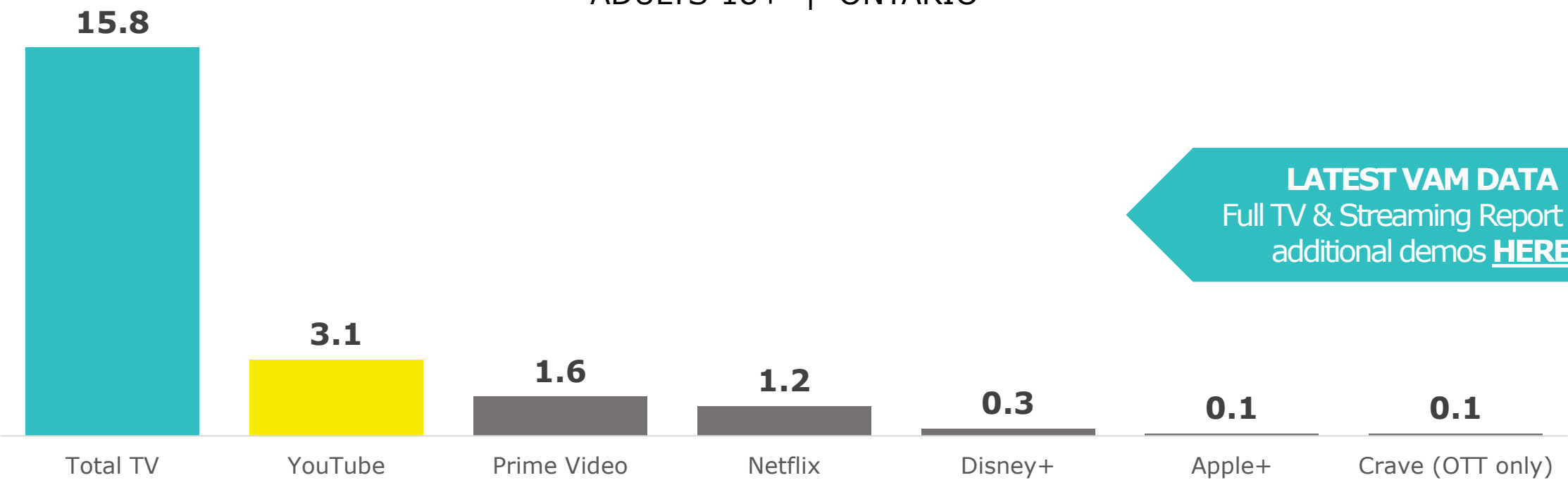


Source: Numeris VAM 09/16/24 to 5/25/2025, Ontario, all time spent per capita
Total TV defined as linear TV and broadcaster streaming services | Streaming Services are ad-free and ad-supported services (in-home viewing only)
Other Streaming Services: AppleTV+, CBS News, Club Illico, Crave (OTT Only), Crunchyroll, Daily Motion, DAZN, Discovery Plus, ET Online US, FuboTV, Paramount+, Pluto TV, Roku Channel, Samsung TV Plus, TED, TubiTV

Total TV: dominates time spent

AVERAGE WEEKLY HOURS

ADULTS 18+ | ONTARIO



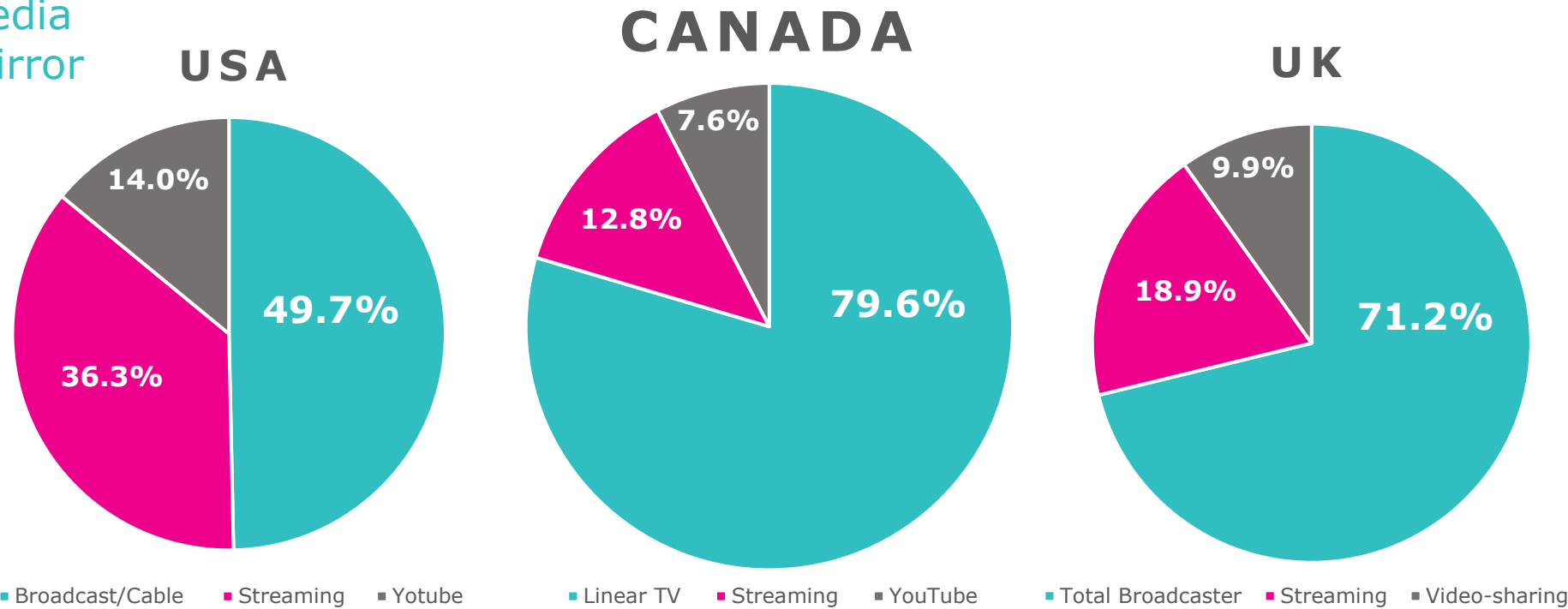
LATEST VAM DATA
Full TV & Streaming Report with
additional demos [HERE](#)

Source: Numeris VAM, 09/16/24 to 5/25/2025 | 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)

NOTE: US data is *not* a proxy for Canadian media

here's the lay of the land:
streaming in the US is much higher than in Canada, where our media habits more closely mirror those in the UK

SHARE OF VIEWING ON A TV SET



US source: Nielsen Gauge, May 2025, P2+, viewing on a TV set (ex “other” viewing; proportionally adjusted)
Canada source: Numeris VAM, Ontario, May 2025, P2+, viewing on a TV set
UK source: BARB, May 2025, P4+, viewing on a TV set | “Streaming” = “Total SVOD/ AVOD” | “Video-sharing” is largely YouTube, but also includes TikTok, Twitch etc. (on a TV set)

➡ IMPACT

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





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

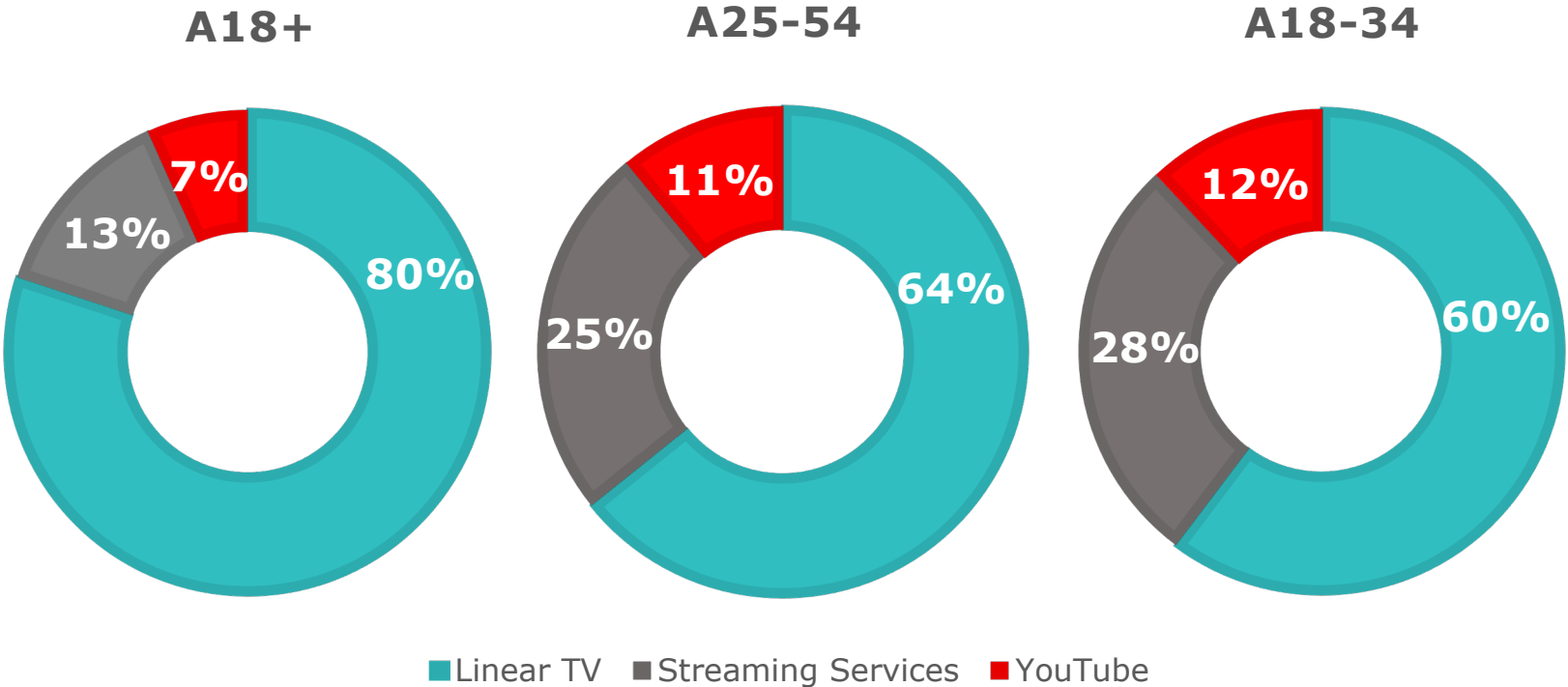
Leo Burnett

big screen, big attention

linear TV makes up the majority of what we're watching on a TV screen

WHY THIS MATTERS

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

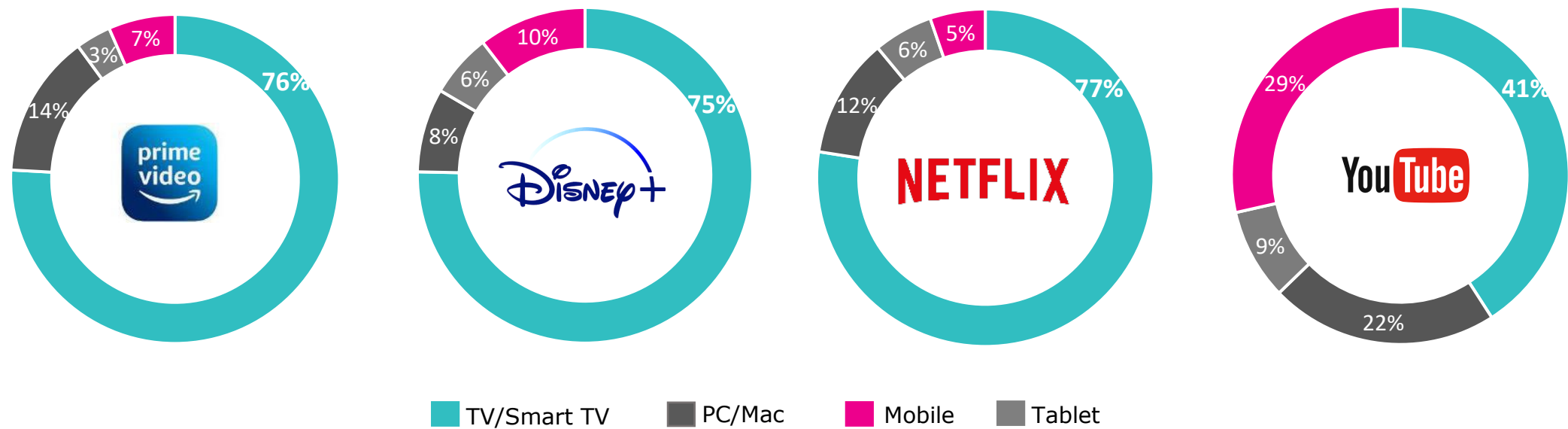


Note: Streaming Services include ad-free and ad-supported services
Source: Numeris VAM, 09/16/24 to 5/25/2025, Ontario | Total Time (hours) on a TV / Smart TV device. Excludes Facebook Video, Instagram Reels, TikTok; Streaming Services include broadcaster streaming services

big screen, big attention

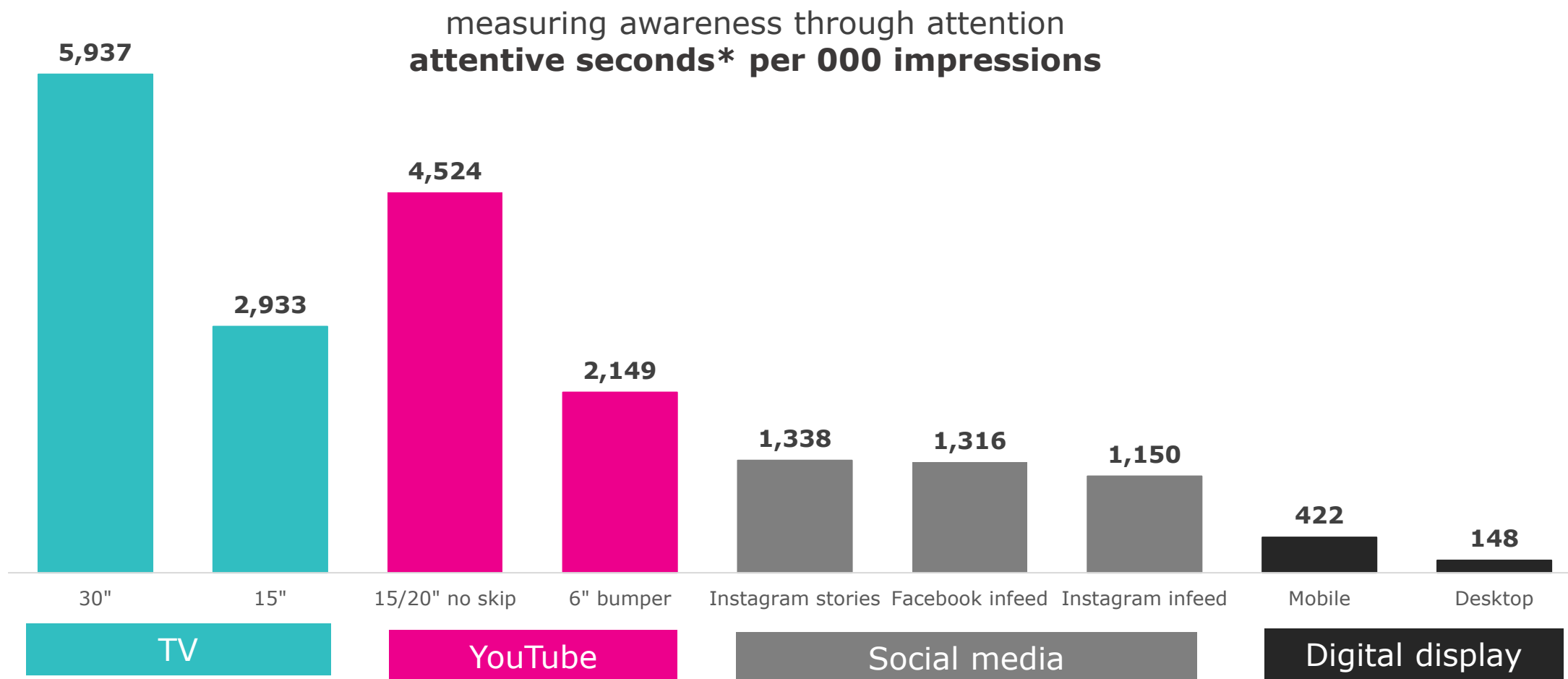
TV screens are the preferred viewing platform for both linear TV and the premium streaming services

STREAMERS SHARE % OF TOTAL TUNING BY DEVICE ONTARIO



Source: Numeris VAM, 09/16/24 to 5/25/2025 | 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

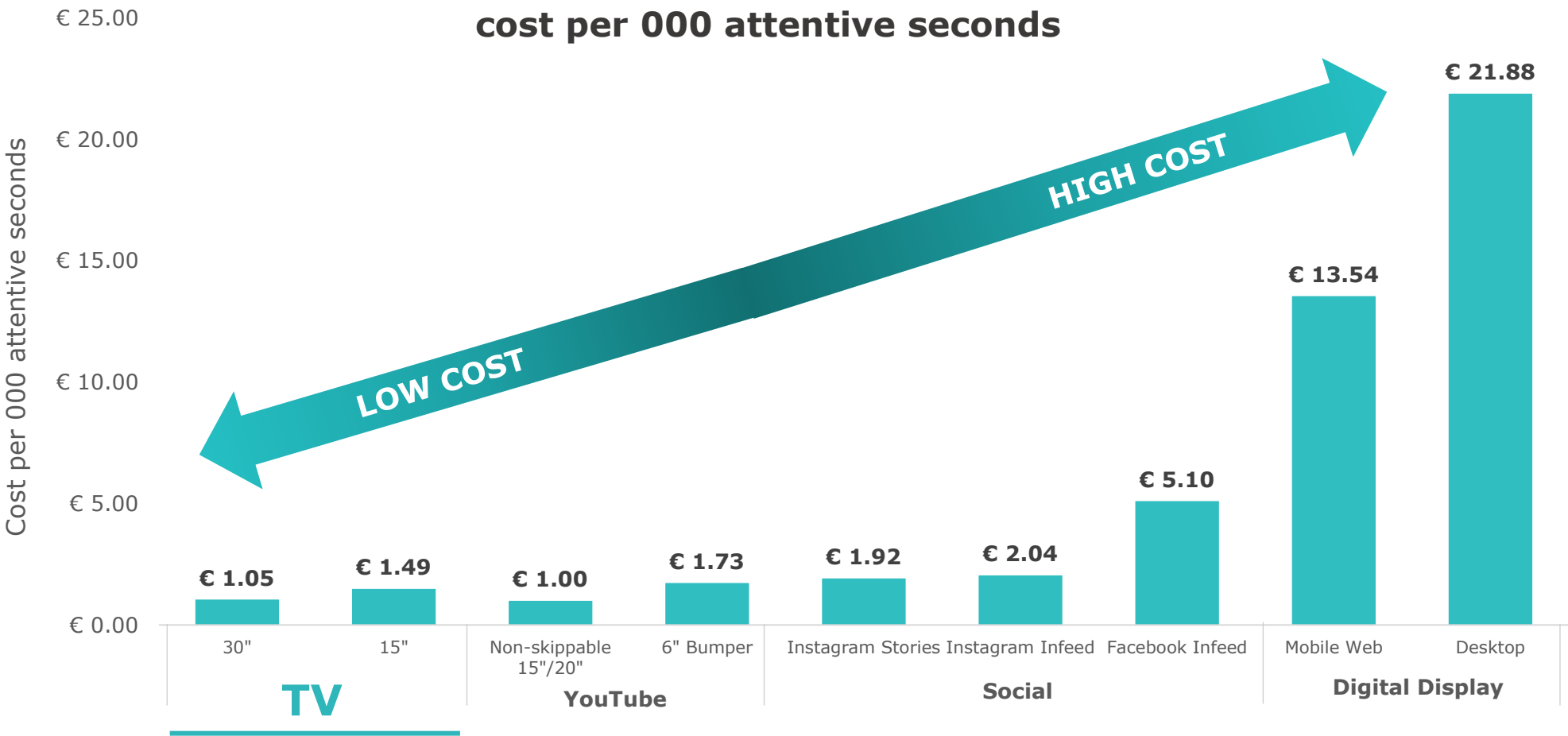
TV ads **deliver** the most “attentive seconds”



Source: Ebiquity, with Lumen, TVision and Dan White – The Challenge of Attention, June 2021

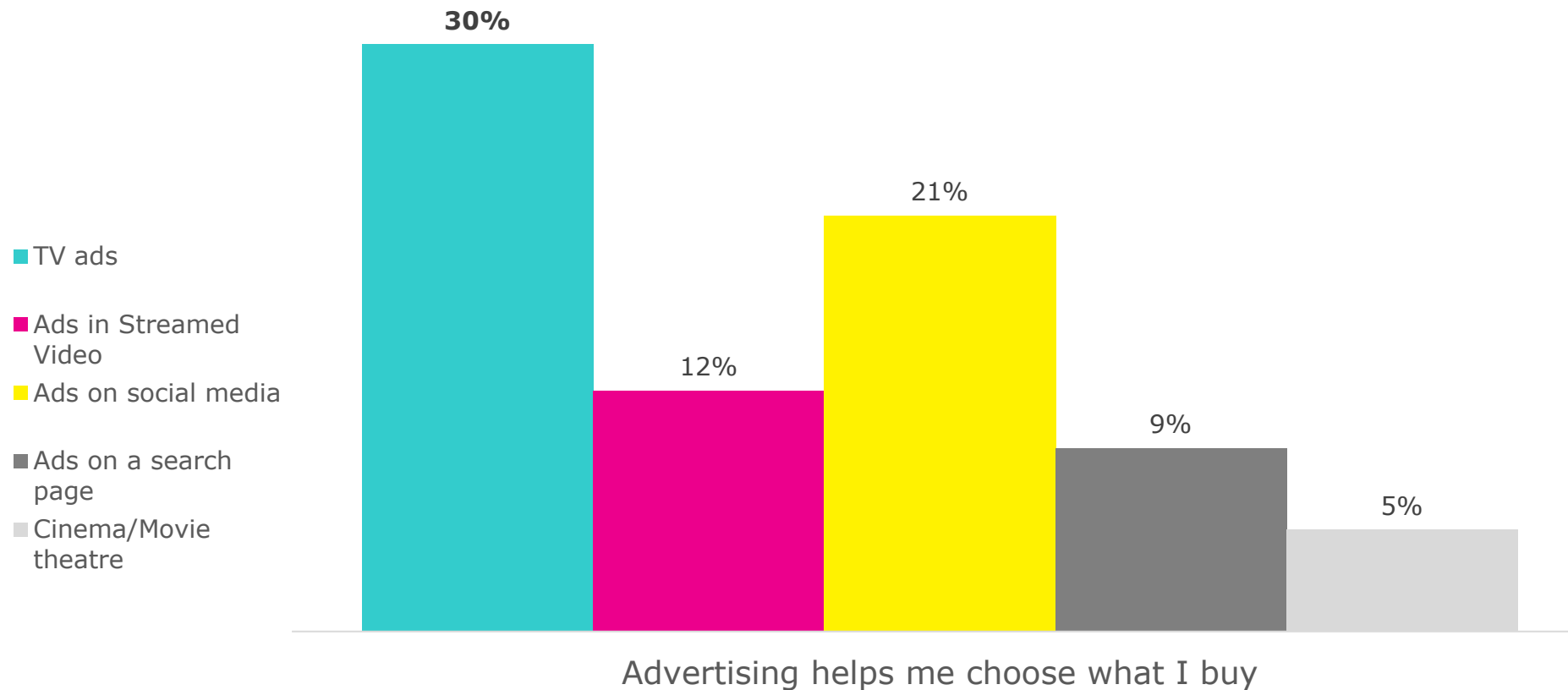
* “attentive seconds” = the actual time an ad is viewed by a person.

TV is an attention bargain

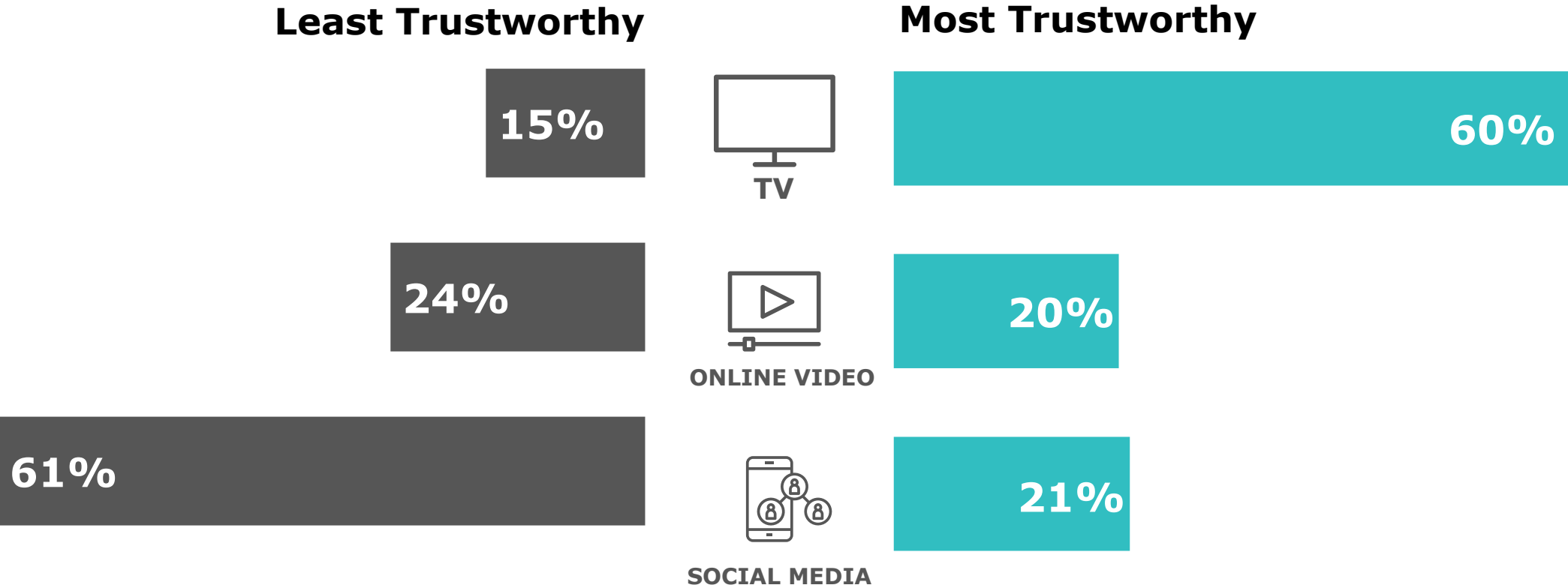


Source: Lumen [The True Cost of Advertising Attention](#)

TV advertising is most likely to **drive purchase decisions**



TV is the **most trustworthy** medium for Canadians, social is the least



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

Source: YouGov survey, Total Canada, A18+, July 2024

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



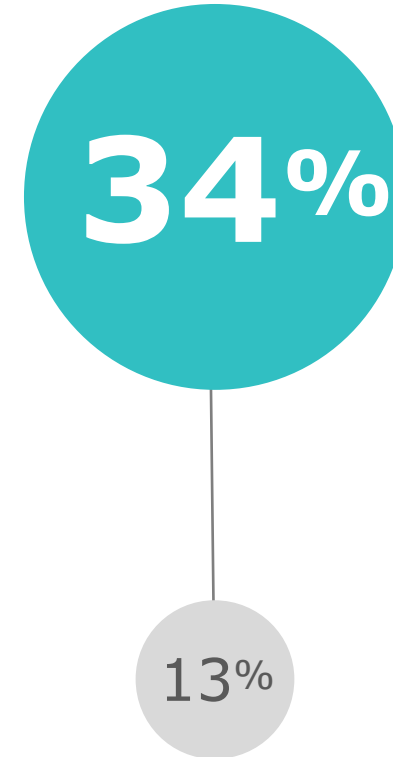
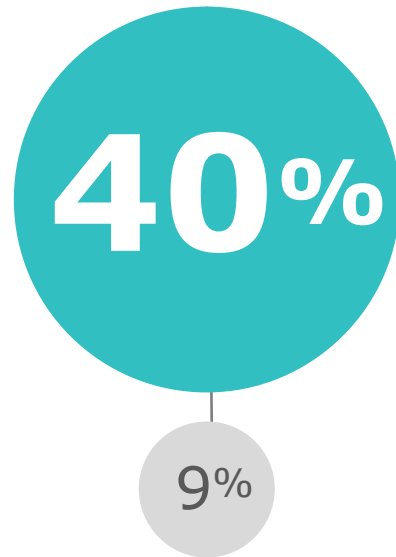
TV



YOUTUBE
(second highest)

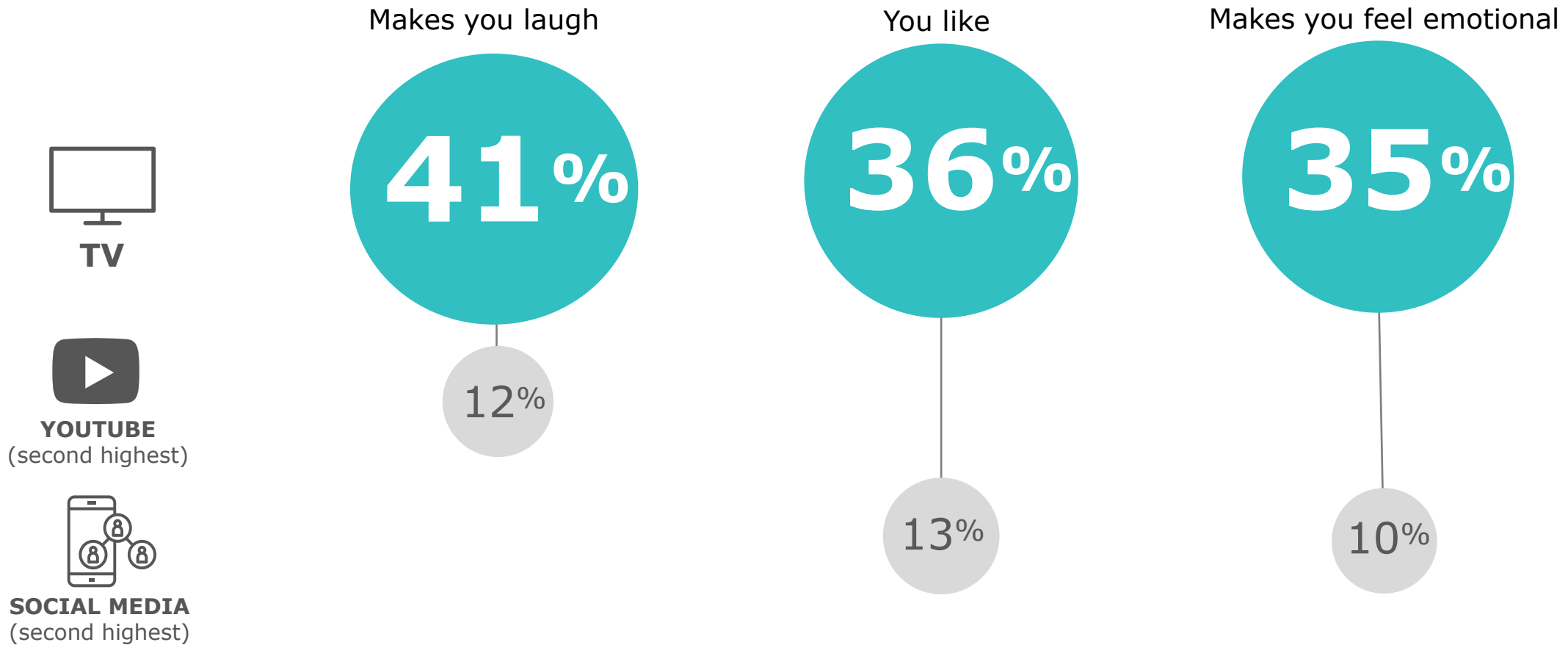


SOCIAL MEDIA
(second highest)



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

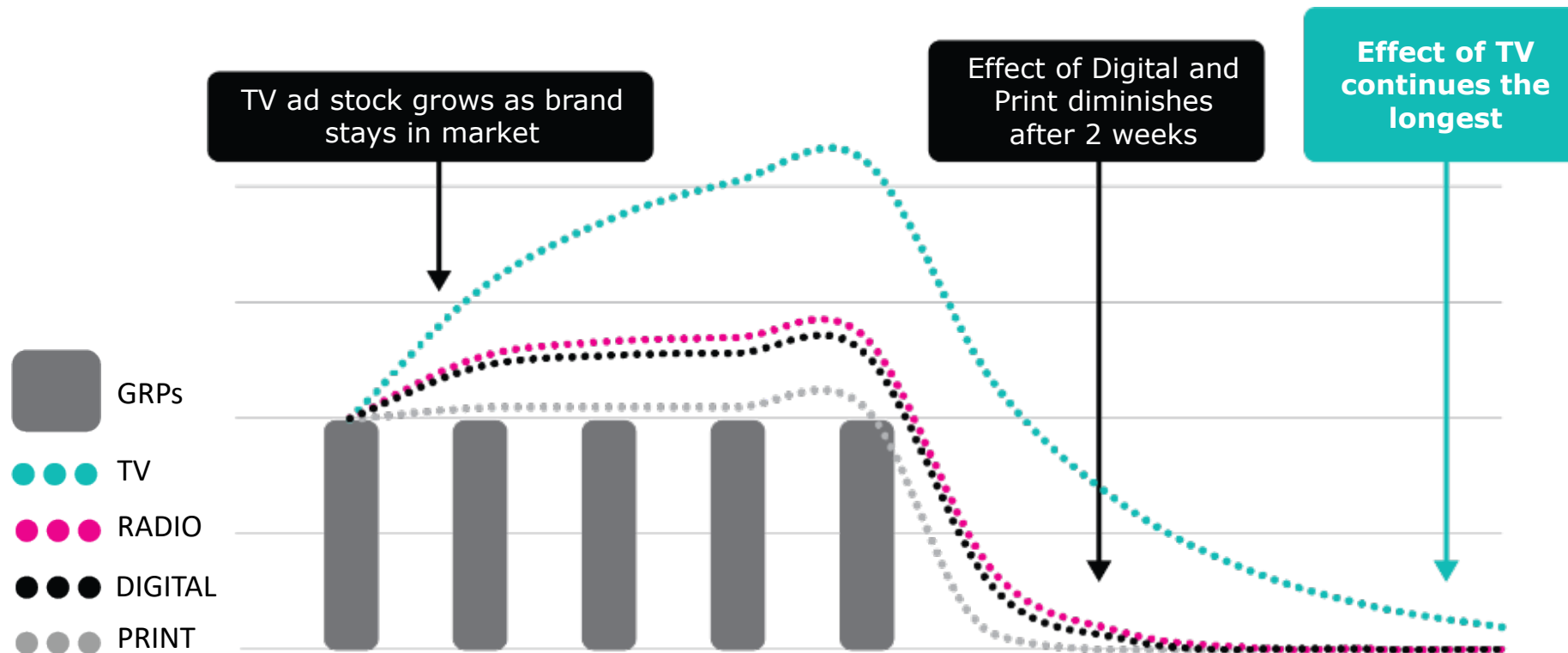
TV advertising is most likely to generate **emotion** and make people **laugh**



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

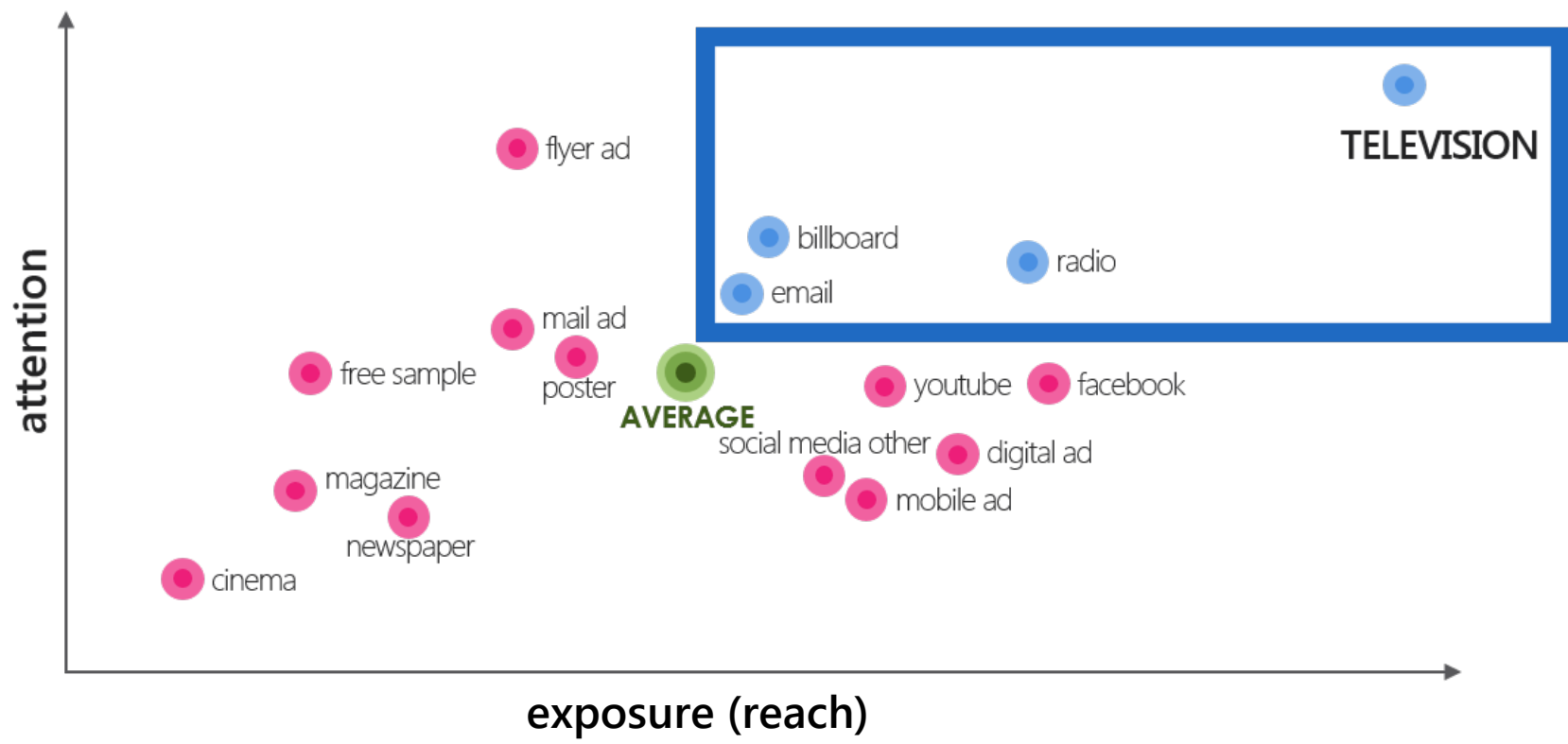


AD STOCK DEFINITION:

the lingering impact of advertising on consumer behavior after the advertising campaign has ended, recognizing that the effects of advertising don't disappear immediately after an ad is shown but rather continue to influence consumers for a period of time.

TV leads in exposure and attention

TV delivers the highest exposure through its mass reach while capturing the greatest consumer attention





EFFICIENCY

**TV delivers the
highest 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,
Consultant, Columnist, and Professor

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

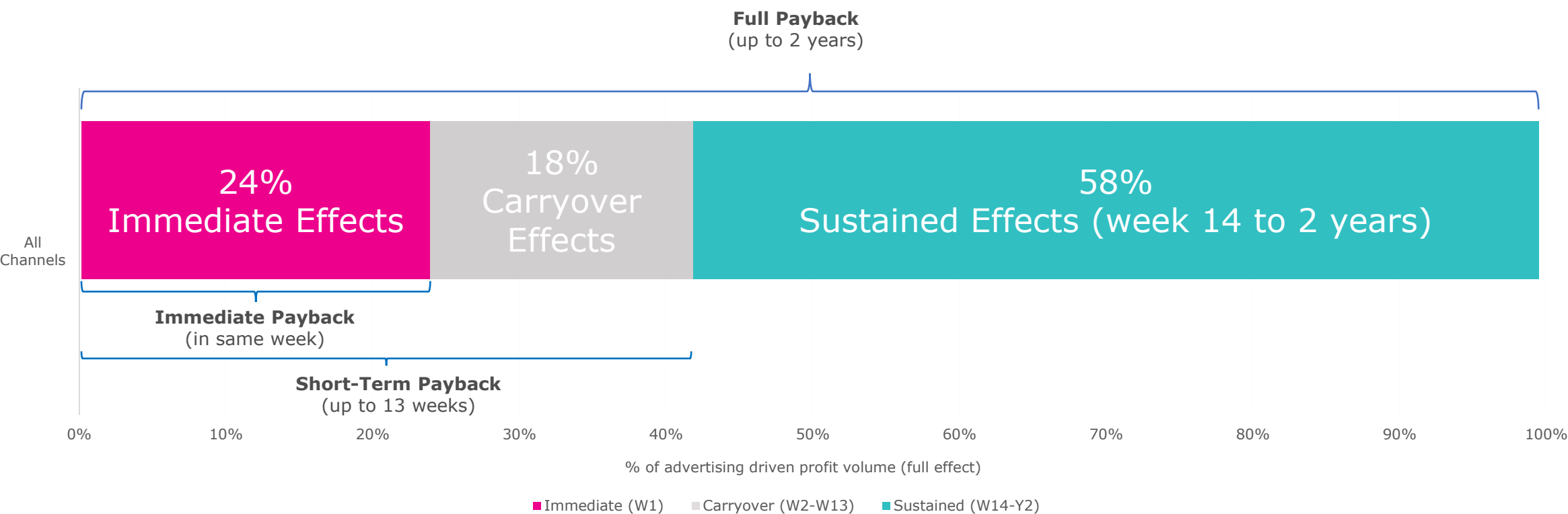
STAS = Short Term Advertising Strength

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

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

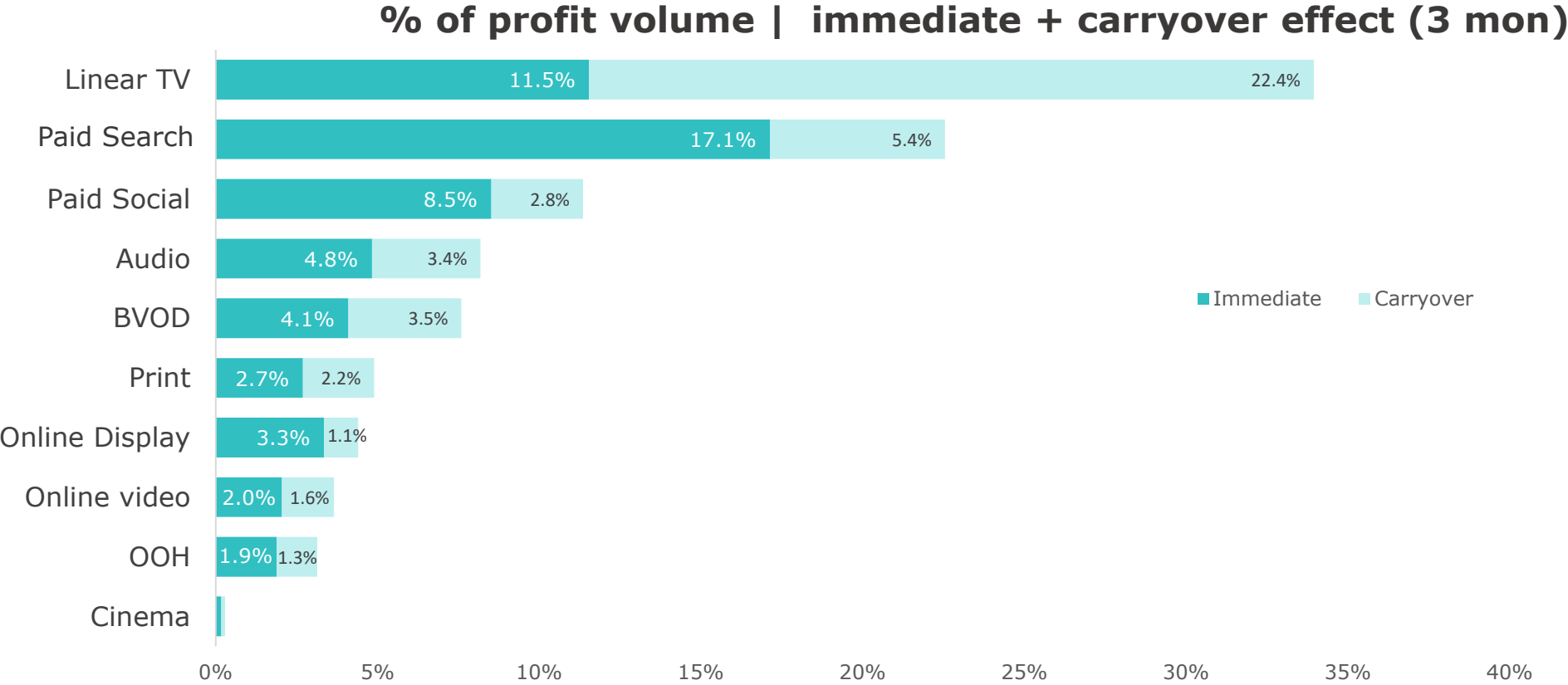
advertising **works** in the short and long term

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



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

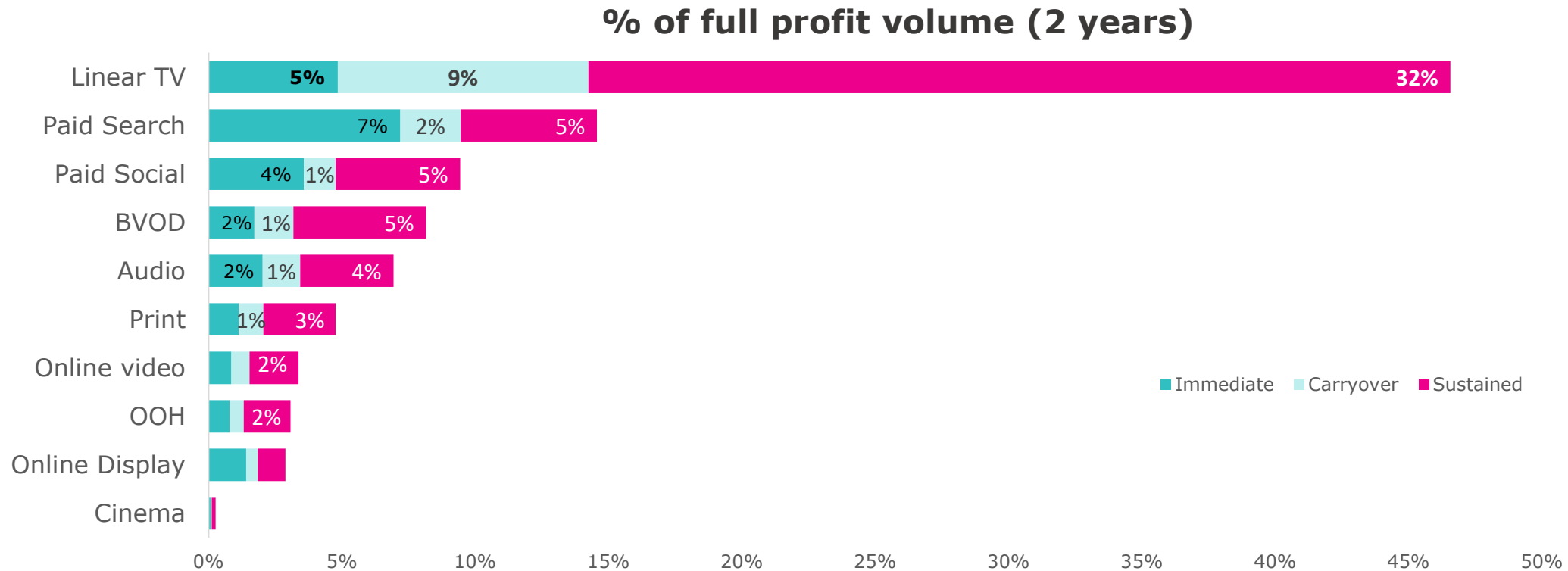
TV is a strong **profit driver** in the short term but jumps to the **lead** when you include carryover effects



Source: [Profit Ability 2](#), April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.
Immediate contribution = the same week of advertising exposure. Carryover contribution = the contribution within 13 weeks of ad exposure



linear TV is unmatched as the total profit ROI volume driver in the long term

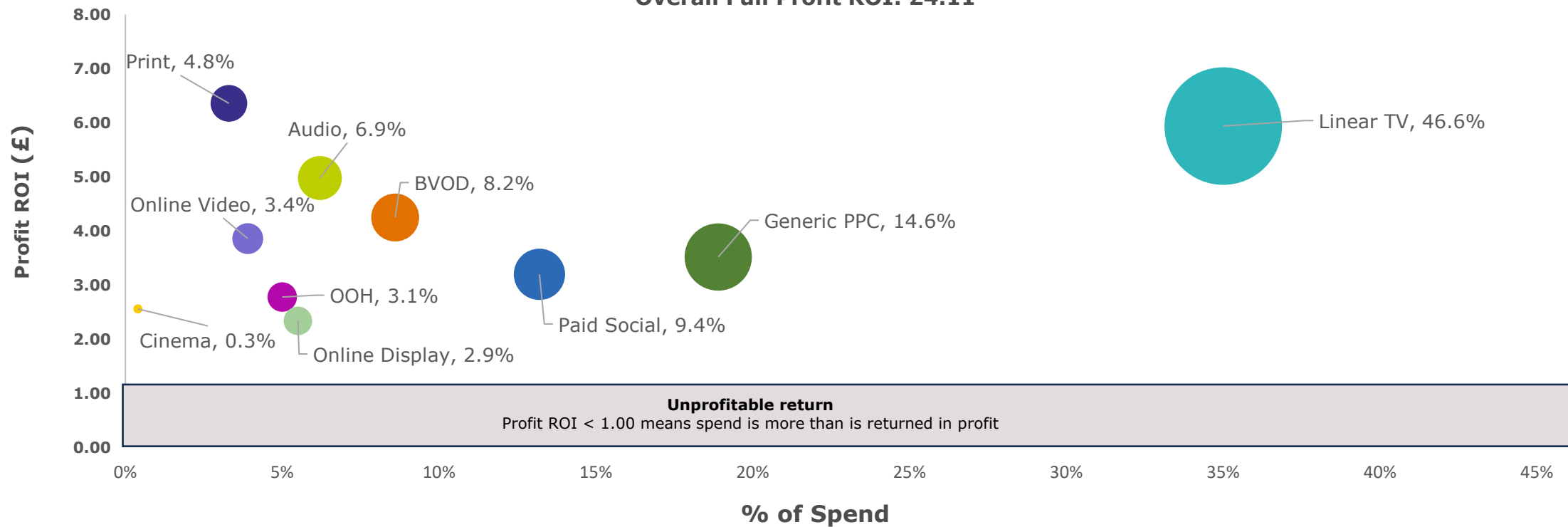


Source: Profit Ability 2, April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK. Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK. Immediate contribution = same week as advertising, Carryover = within 13 weeks, Sustained = within 2 years

TV advertising is the **greatest** driver of overall profit volume

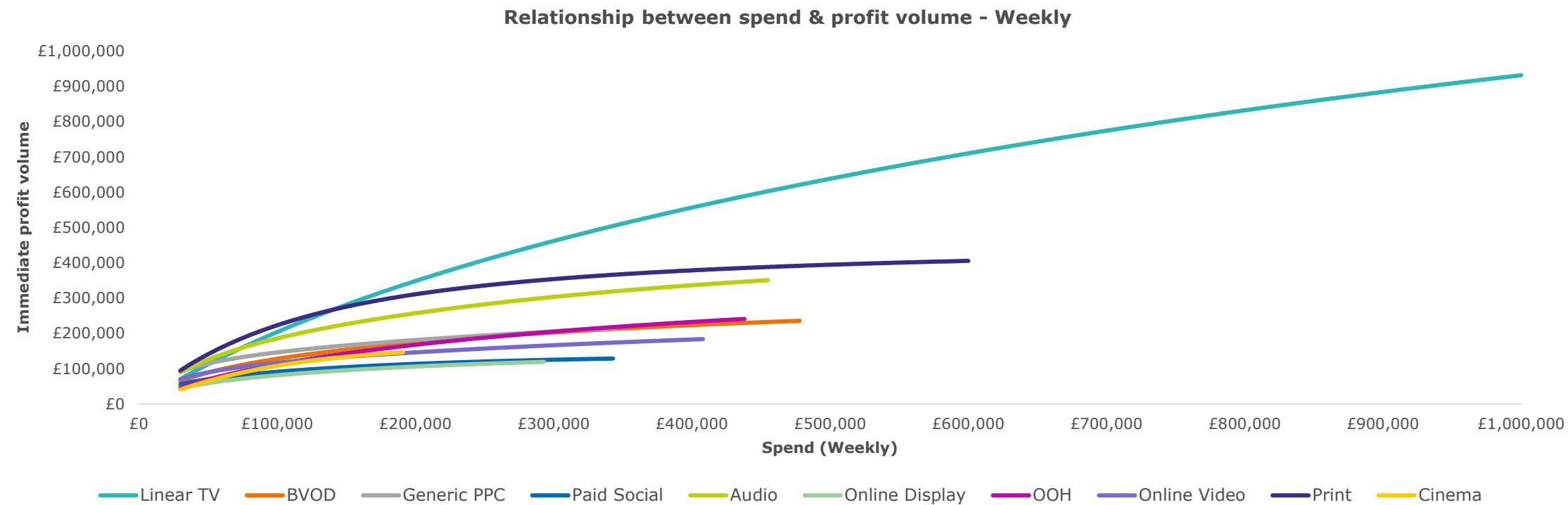
linear TV delivers an exceptional **£5.94 ROI**, contributing 47% of total ad-generated profits on only 35% of total advertising spend

Full profit volume & profit ROI
Bubble size represents % of full profit volume
Overall Full Profit ROI: £4.11



TV has scale

the diminishing returns profile and scalability vary by channel



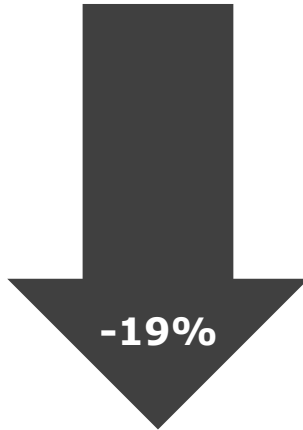
Source: Profit Ability 2, April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.
Immediate effect = profit volume in week of advertising spend

TV improves digital's performance

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



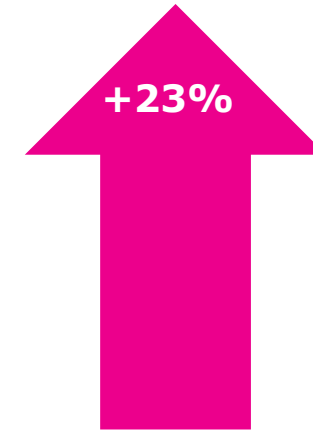
Standalone Digital ROI



**without TV's
halo effect,
digital
advertising's
average ROI
would decline
by 19%**



TV's Adjusted ROI



➡ SUMMARY



TV's **winning** formula

REACH

TV has the **greatest reach** and **dominates** time spent with media

IMPACT

TV ads produce the **biggest** impact and garners the **most attention**

EFFICIENCY

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

TV's key attributes



100% viewable



Full screen



Sound on



Viewed by humans



Transparent measurement



Brand safe



Shared viewing



High quality content

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.

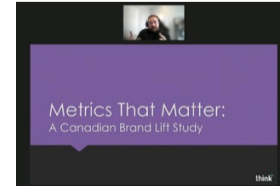
[learn more »](#)



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 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 »](#)



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

think^{tv}

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there's much more we'd love to share.
click the links below and let's connect.

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reach out



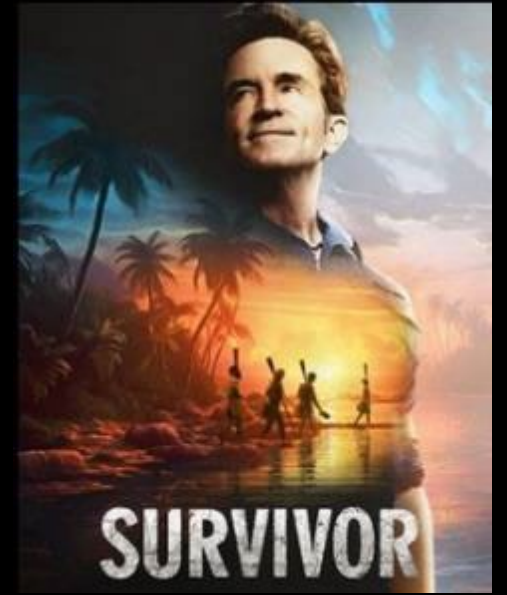


appendix

**what Canadians are
watching**



what are Canadians watching?



top 10 TV shows (English)

ADULTS 18+	Channel	AMA (000)
9-1-1: LONE STAR	CTV	1430
MATLOCK	Global	1412
HIGH POTENTIAL	CTV	1319
9-1-1	Global	1297
ELSBETH	Global	1217
TRACKER	CTV	1100
BLUE BLOODS	CTV	1042
SURVIVOR	Global	1036
FBI	Global	1035
THE ROOKIE	CTV	1021

ADULTS 25-54	Channel	AMA (000)
9-1-1: LONE STAR	CTV	466
9-1-1	Global	404
SURVIVOR	Global	350
BIG BROTHER	Global	350
HIGH POTENTIAL	CTV	336
GHOSTS	Global	328
SATURDAY NIGHT LIVE	Global	325
RESCUE: HI-SURF	CTV	308
GHOSTS	Global	289
MATLOCK	Global	286

ADULTS 18-34	Channel	AMA (000)
9-1-1: LONE STAR	CTV	250
9-1-1	Global	192
BIG BROTHER	Global	188
SURVIVOR	Global	171
SATURDAY NIGHT LIVE	Global	157
ABBOTT ELEMENTARY	Global	150
SHIFTING GEARS	CTV	141
BIG BROTHER	Global	133
RESCUE: HI-SURF	CTV	129
HIGH POTENTIAL	CTV	129

Source: Numeris PPM, Total Canada, 09/16/24 to 05/25/25, 3+ Airing, English Conventional

top 10 sports (English)

ADULTS 18+	Channel	AMA (000)
NFL SUPER BOWL	TSN and CTV	6010
CFL GREY CUP	TSN and CTV	3152
WJC:PRELIM CANADA	TSN and CTV	2435
NHL PLAYOFFS ROUND 2	Rogers Sports Network	2061
WJC:PLAYOFFS CANADA	TSN	1801
NFL CHRISTMAS AFTERNOON	TSN and CTV	1670
NHL PLAYOFFS ROUND 1	Rogers Sports Network	1596
HNIC PRIME EAST	Rogers Sports Network	1436
NHL PLAYOFFS ROUND 3	Rogers Sports Network	1428
CFL PLAYOFFS	TSN and CTV	987

ADULTS 25-54	Channel	AMA (000)
NFL SUPER BOWL	TSN and CTV	2908
CFL GREY CUP	TSN and CTV	1068
WJC:PRELIM CANADA	TSN and CTV	989
NFL CHRISTMAS AFTERNOON	TSN	979
NHL PLAYOFFS ROUND 2	Rogers Sports Network	796
WJC:PLAYOFFS CANADA	TSN	769
NHL PLAYOFFS ROUND 1	Rogers Sports Network	600
HNIC PRIME EAST	Rogers Sports Network	555
NHL PLAYOFFS ROUND 3	Rogers Sports Network	513
NFL PLAYOFFS	CTV	375

ADULTS 18-34	Channel	AMA (000)
NFL SUPER BOWL	TSN and CTV	1548
CFL GREY CUP	TSN and CTV	619
WJC:PLAYOFFS CANADA	TSN	401
WJC:PRELIM CANADA	TSN and CTV	349
NHL PLAYOFFS ROUND 2	Rogers Sports Network	349
NFL CHRISTMAS AFTERNOON	TSN and CTV	349
NFL PLAYOFFS SUNDAY PRIME	TSN	218
NHL PLAYOFFS ROUND 3	Rogers Sports Network	214
HNIC PRIME EAST	Rogers Sports Network	266
NHL PLAYOFFS ROUND 1	Rogers Sports Network	261

Source: Numeris PPM Total Canada, 09/16/24 to 05/25/25, Sports, English networks, TSN and CTV if the game is simulcast