

the power of TV

in an attention economy

think^{tv}



Top 5 reasons to advertise on TV:

1. **Consumers are watching:** Total TV has the largest reach and dominates time spent with video, **surpassing YouTube** and the combined viewership of all streaming services
2. **TV advertising drives profit:** TV delivers one of the **strongest ROIs** and is the **largest contributor of profit**
3. **Ads on TV are more memorable:** Ads on TV garner **superior attention**, delivering far more attentive seconds than YouTube and social media
4. **TV is a brand-safe environment:** TV is the **most trusted** medium for video advertising, delivering human, third-party measured audiences in a premium environment
5. **TV works across the funnel,** delivering **sales and traffic** in the short term, and building brands and growth in the long term

In a fragmented world, Total TV is the clearest path through the noise.

Digital fragmentation has made reach expensive and attention scarce. The brands winning market share aren't abandoning TV, they're leaning in.

Scale. Profit. Impact.

Total TV delivers where it matters most.

Total TV = linear TV + broadcaster streaming services



SCALE

TV delivers unmatched reach and time spent





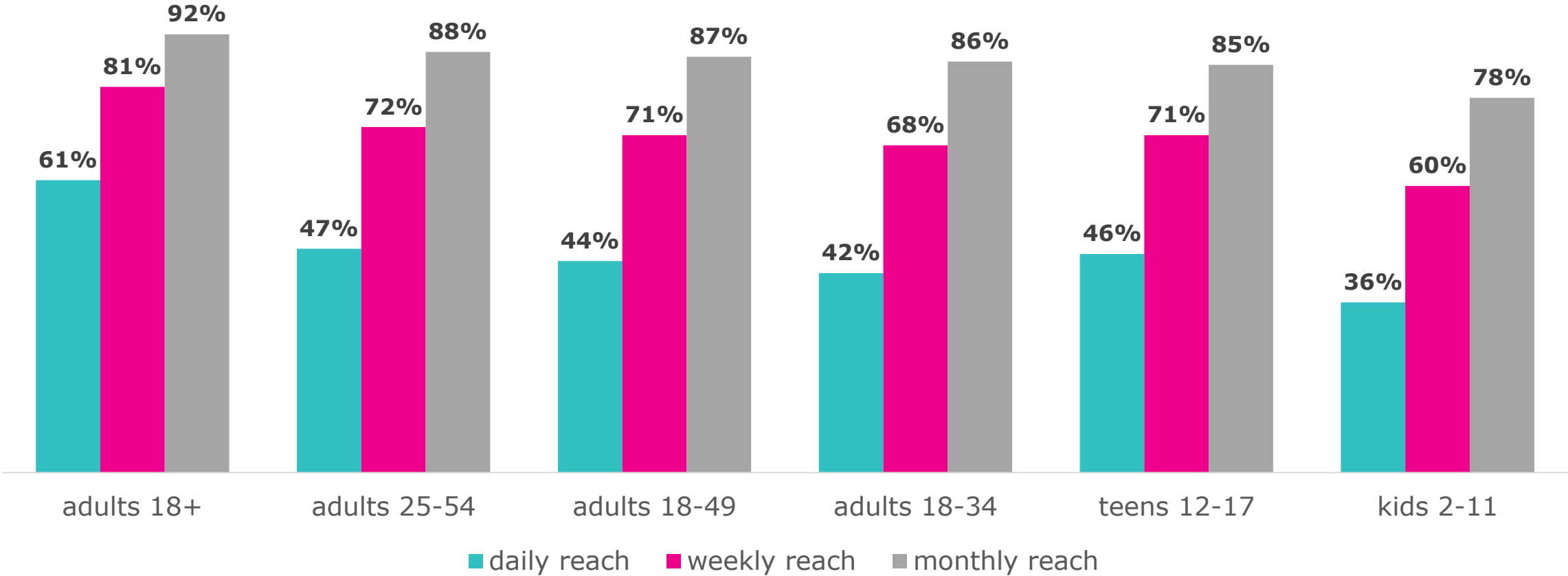
“Marketing activities only build mental availability in the audience they reach.

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

Byron Sharp

Author, How Brands Grow

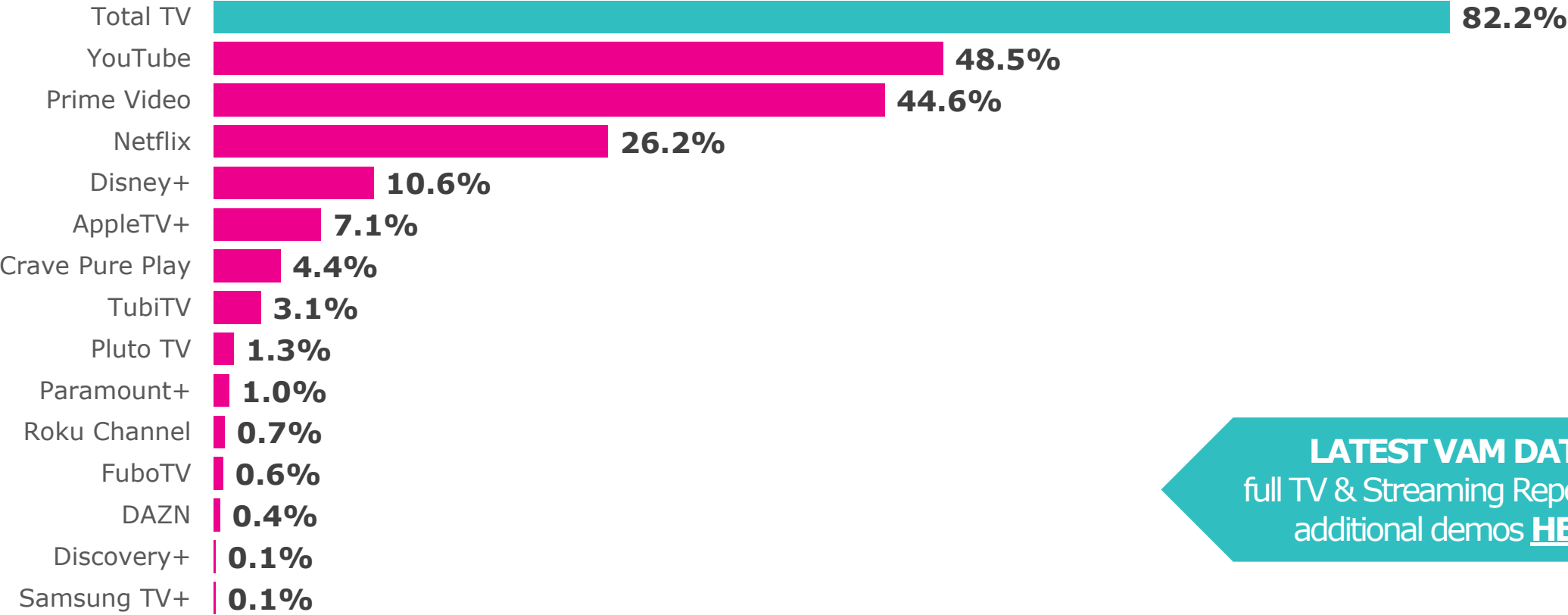
Linear TV reaches **92%** of Canadians monthly



Source: Numeris PPM, Total Canada, 09/15/25 to 05/31/2026
Linear 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+

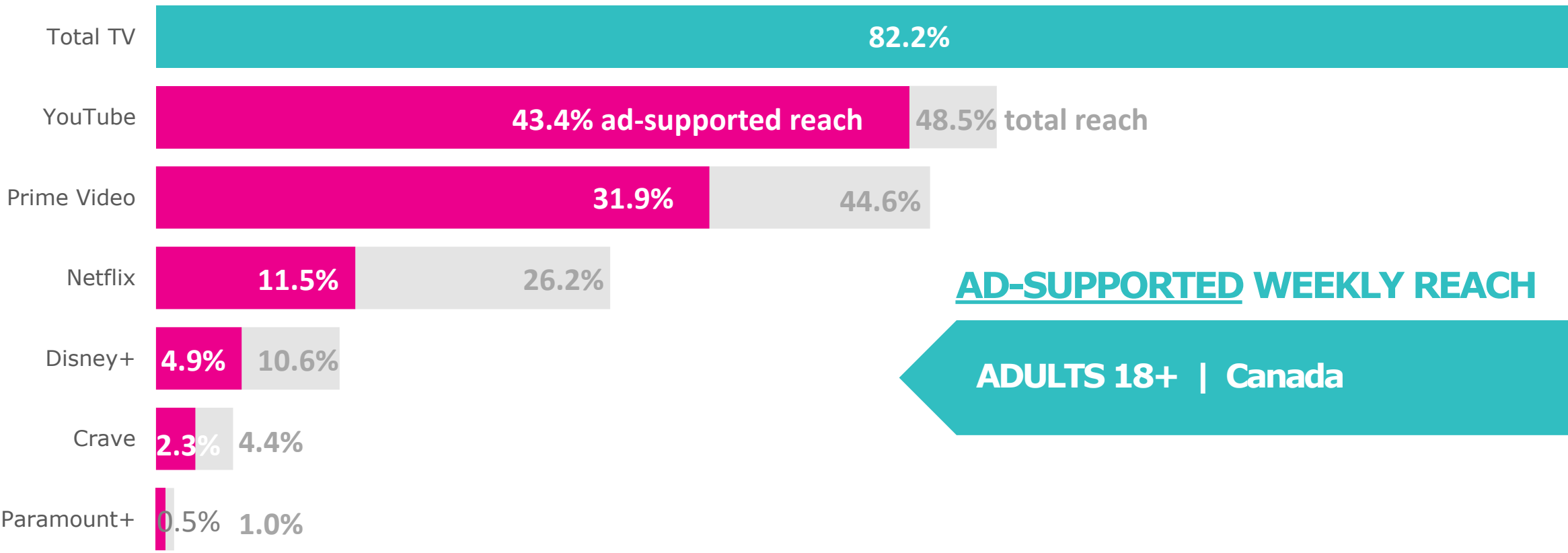


LATEST VAM DATA
full TV & Streaming Report with
additional demos [HERE](#)

Source: Numeris VAM, 9/15/2025 to 05/31/2026, Canada
Total TV defined as linear TV and broadcaster streaming services | Streaming Services include ad-free and ad-supported services (in-home viewing only)

not all reach is ad-supported

TV's full 82.2% reach is ad-supported, while the bulk of streamers' reach is not ad-supported



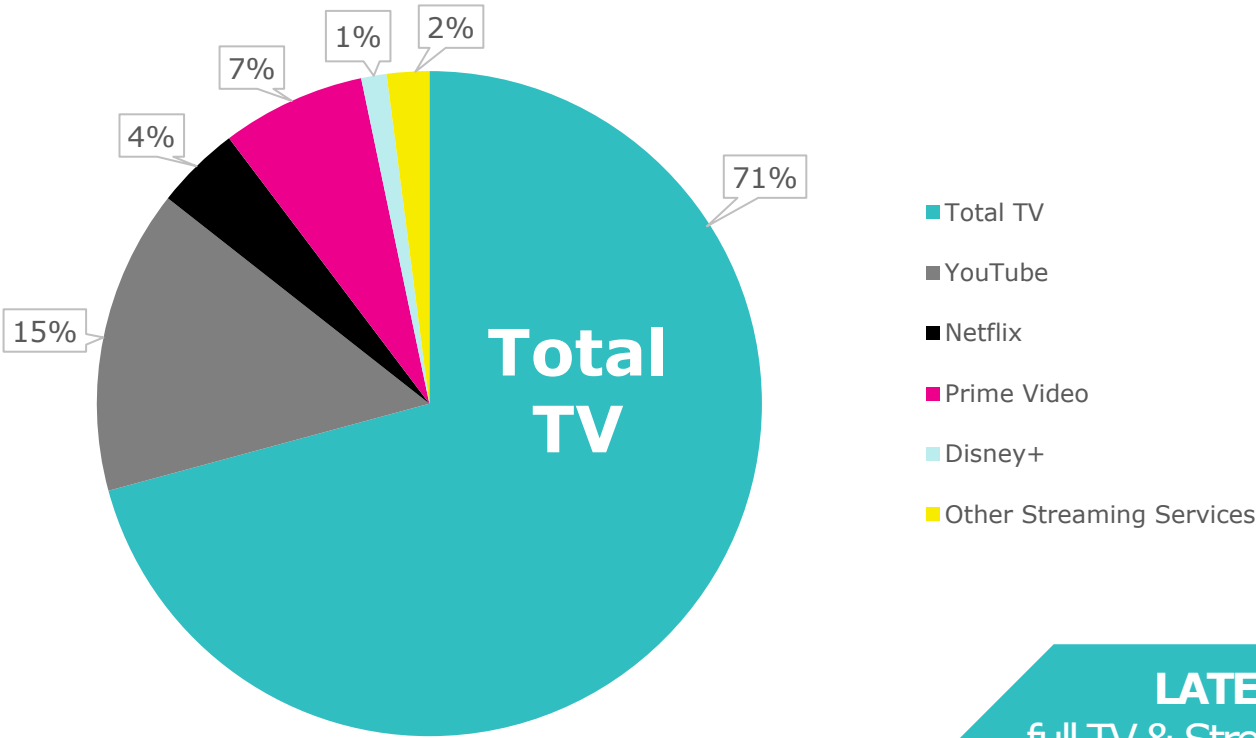
AD-SUPPORTED WEEKLY REACH

ADULTS 18+ | Canada

Source: Numeris VAM, 9/15/2025 to 05/31/2026, Canada
Total TV defined as linear TV and broadcaster streaming services | Streaming Services include ad-free and ad-supported services (in-home viewing only)
Ad Factors via Echo Intelligence Fall 2025

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

SHARE OF VIDEO
ADULTS 18+



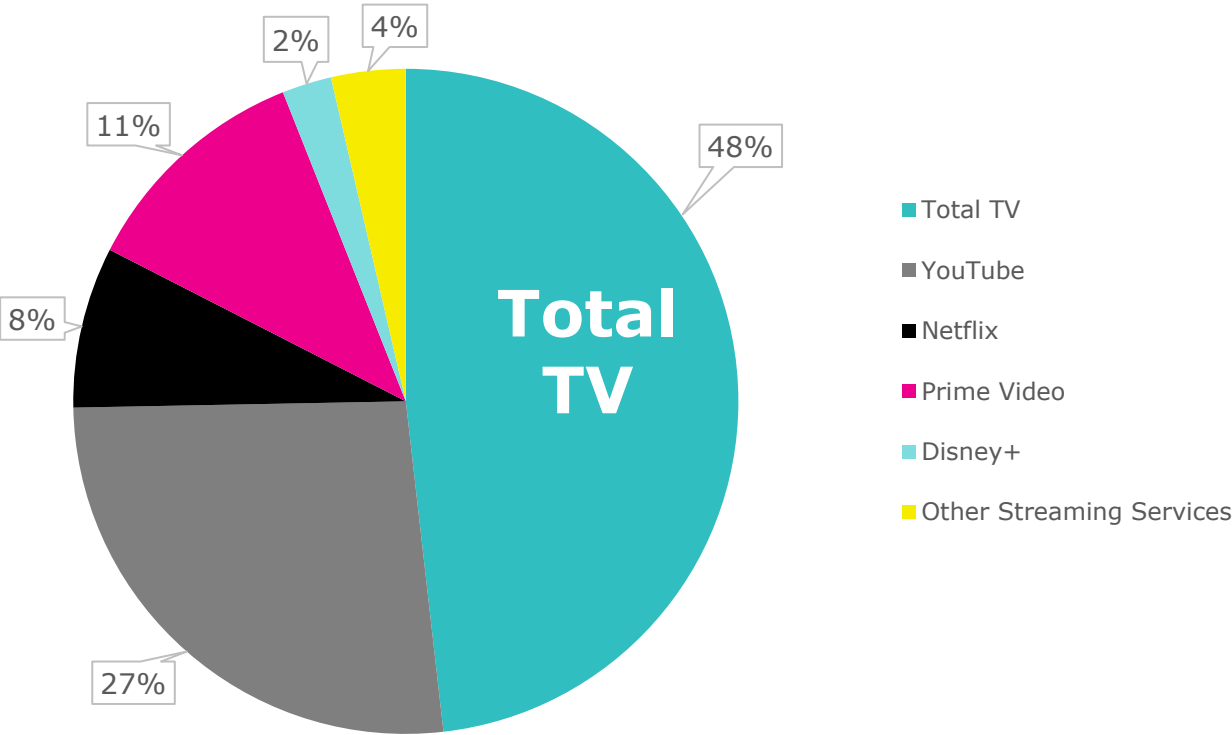
LATEST VAM DATA
full TV & Streaming Report Available
[HERE](#)

Source: Numeris VAM, 9/15/2025 to 5/31/2026, Canada, all time spent per capita
Total TV defined as linear TV and broadcaster streaming services | Streaming Services include 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

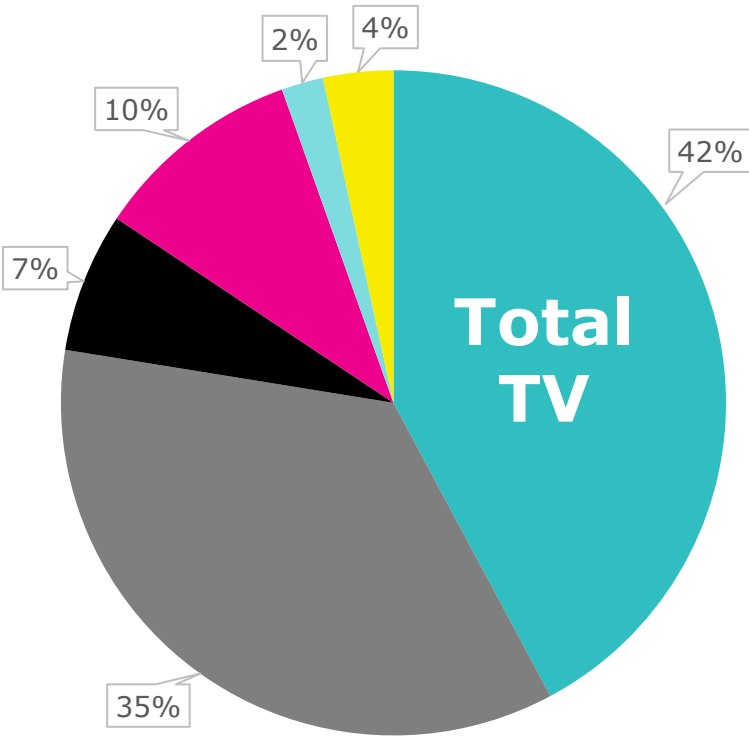
...across **key** demos

SHARE OF VIDEO

ADULTS 25-54



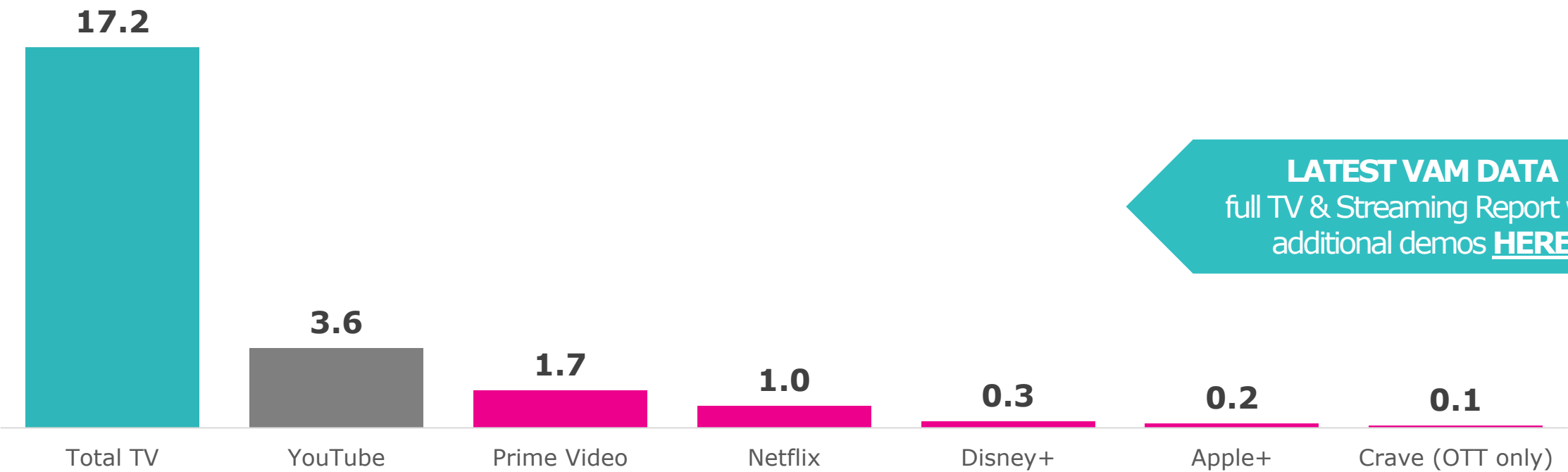
ADULTS 18-34



Source: Numeris VAM, 9/15/2025 to 5/31/2026, Canada, all time spent per capita
Total TV defined as linear TV and broadcaster streaming services | Streaming Services include 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+



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

Source: Numeris VAM 9/15/2025 to 05/31/2026 | Canada | all time spent per capita
Total TV defined as linear TV and broadcaster streaming services | Streaming Services include ad-free and ad-supported services (in-home viewing only)

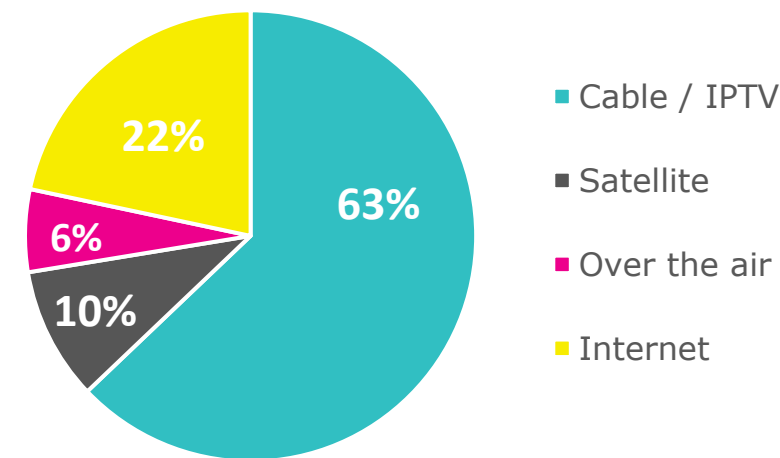
access to TV is almost universal

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 3.9% year-over-year, anyone with an internet connection has access to linear TV content

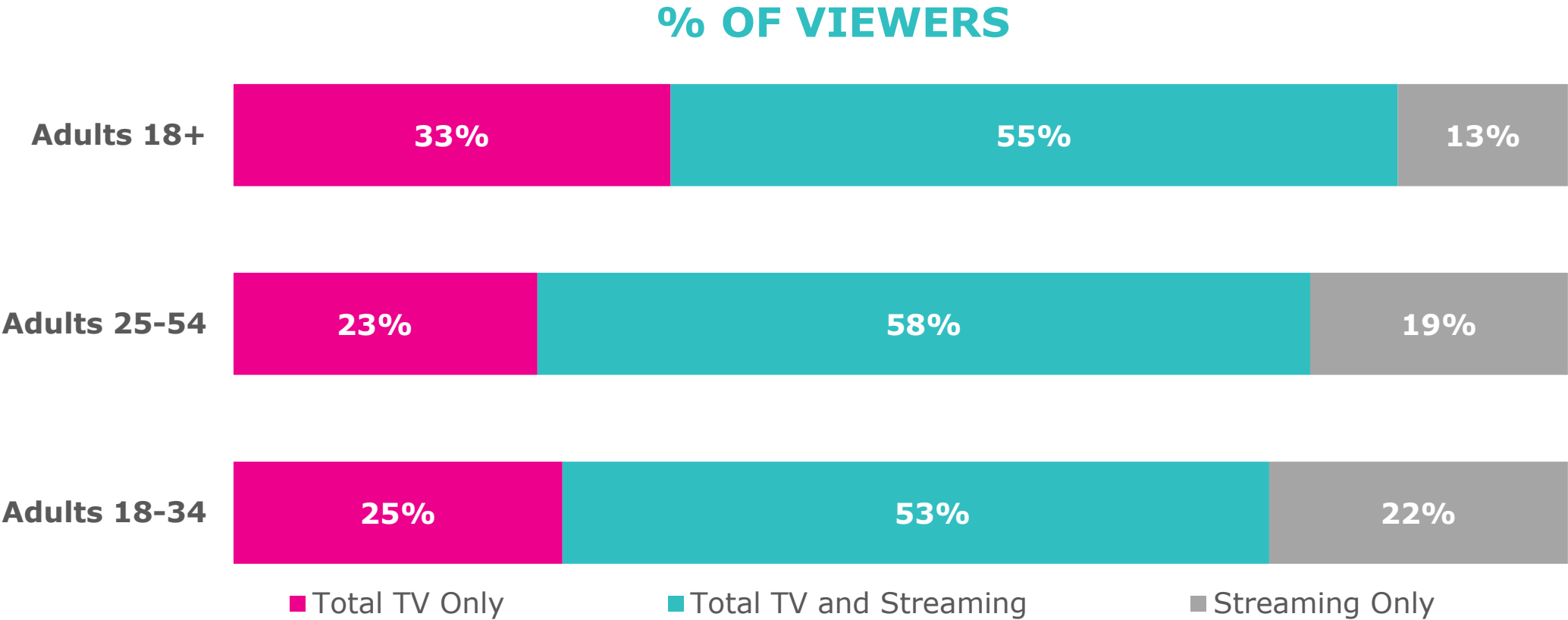


	Jan '25	Jan '26	Index (YOY)
TOTAL PAID SUBS	9,440,222	9,072,648	(3.9%)
Basic/Digital Cable	4,392,375	4,263,015	(2.9%)
Satellite	1,167,493	962,143	(17.6%)
Telco/IPTV (Internet Protocol TV)	3,857,509	3,824,715	0%
Other	22,845	22,775	(0.3%)

Source: Numeris Universe Estimates: * Jan 2026 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

very few Canadians are “only streamers”

in fact, there are more “TV Only”
viewers than “Streaming Only”



Source: Numeris VAM, 9/15/2025 to 5/31/2026, Total Canada, % 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

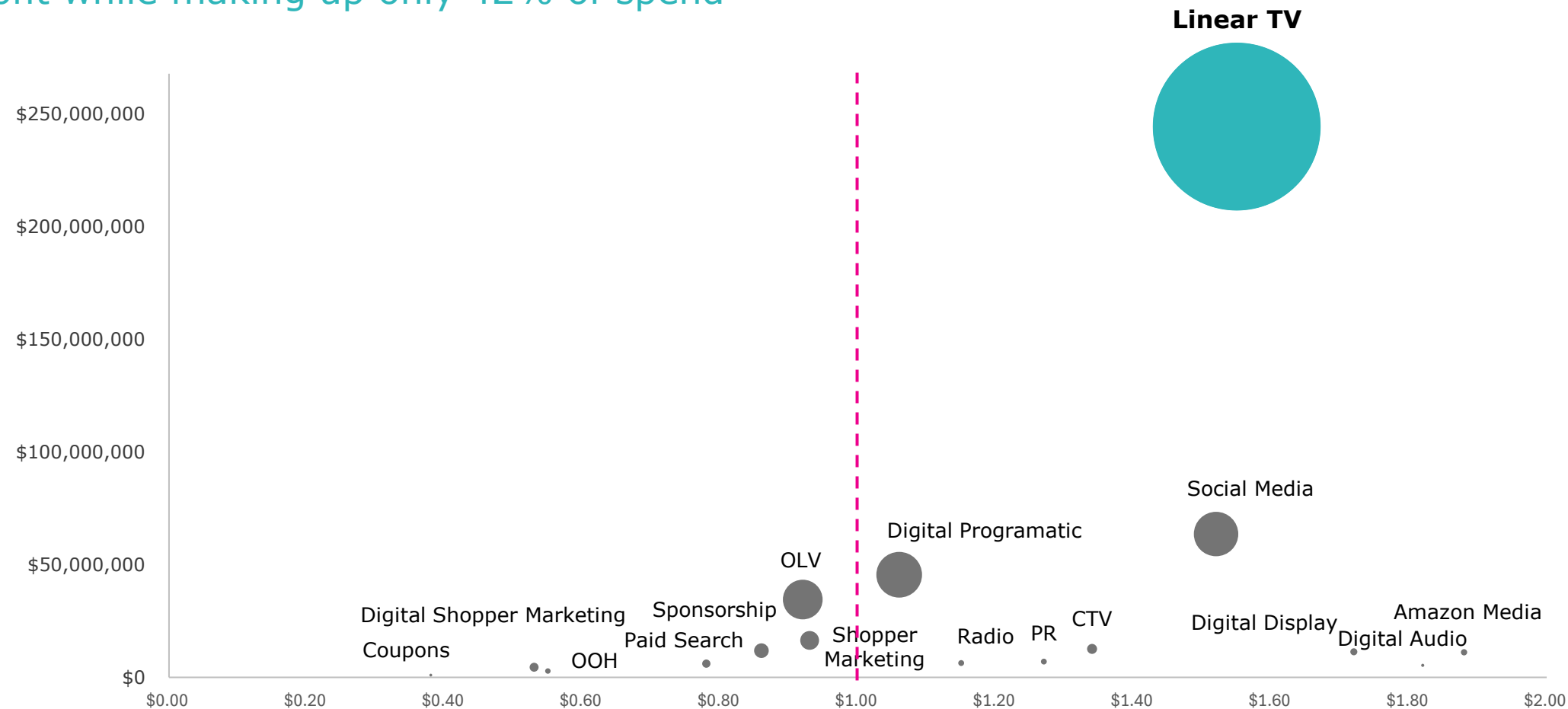


➡ PROFIT

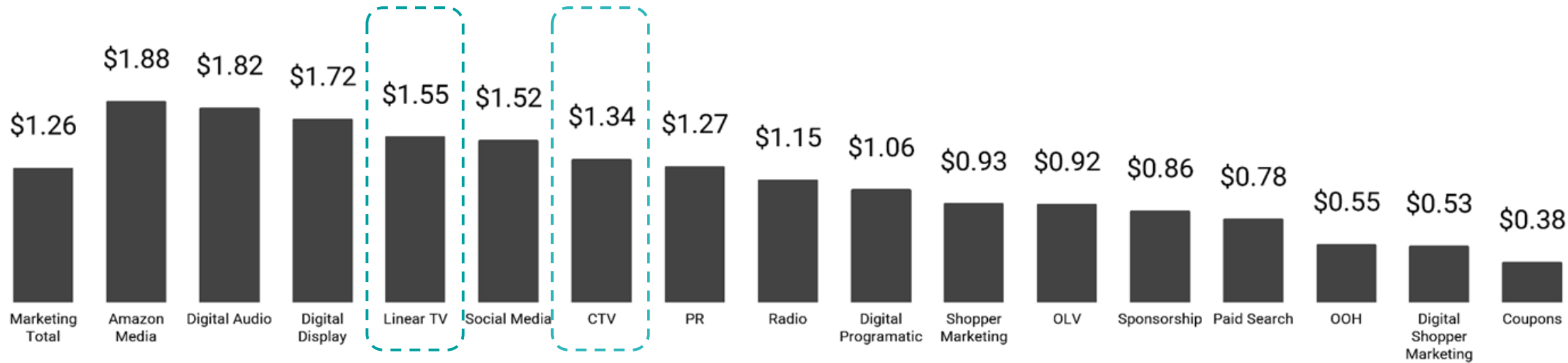
TV works in both the **short** and **long term**, and is the largest contributor of ad profit

TV is the largest profit driver in Canada

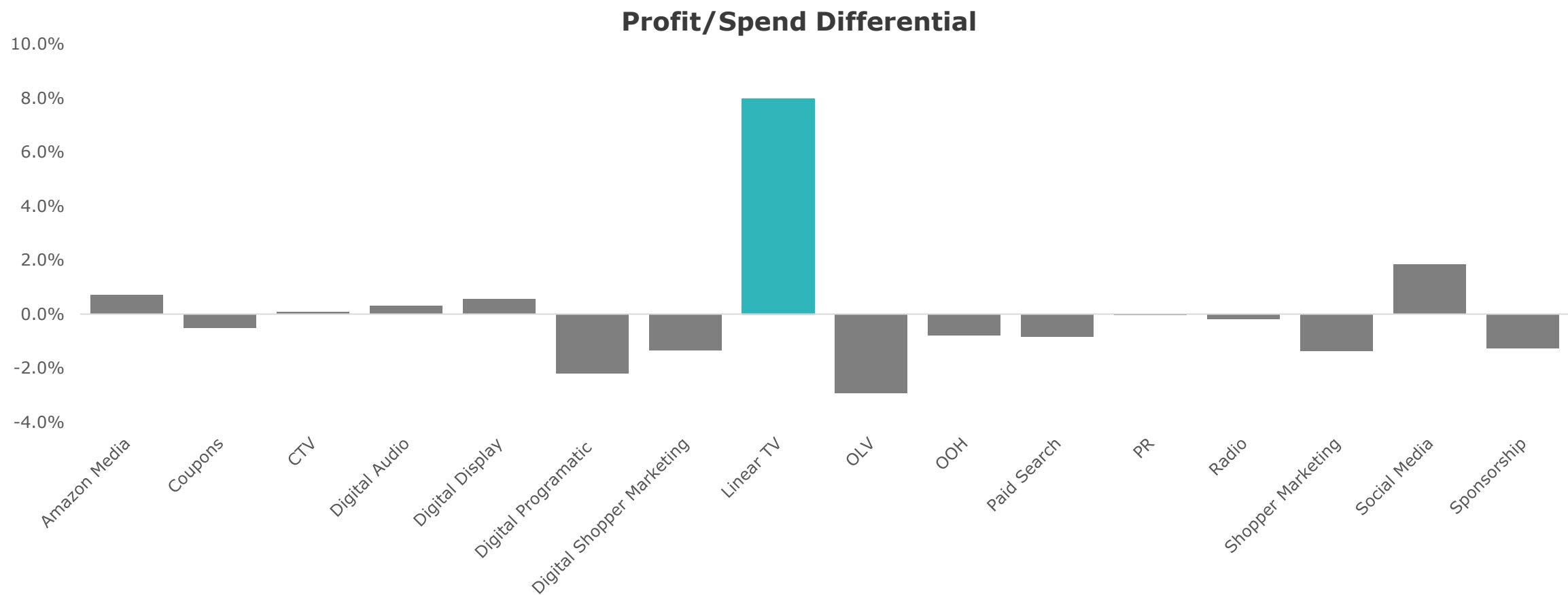
TV delivers 50% of measured short-term profit while making up only 42% of spend



TV delivers impressive short term ROI

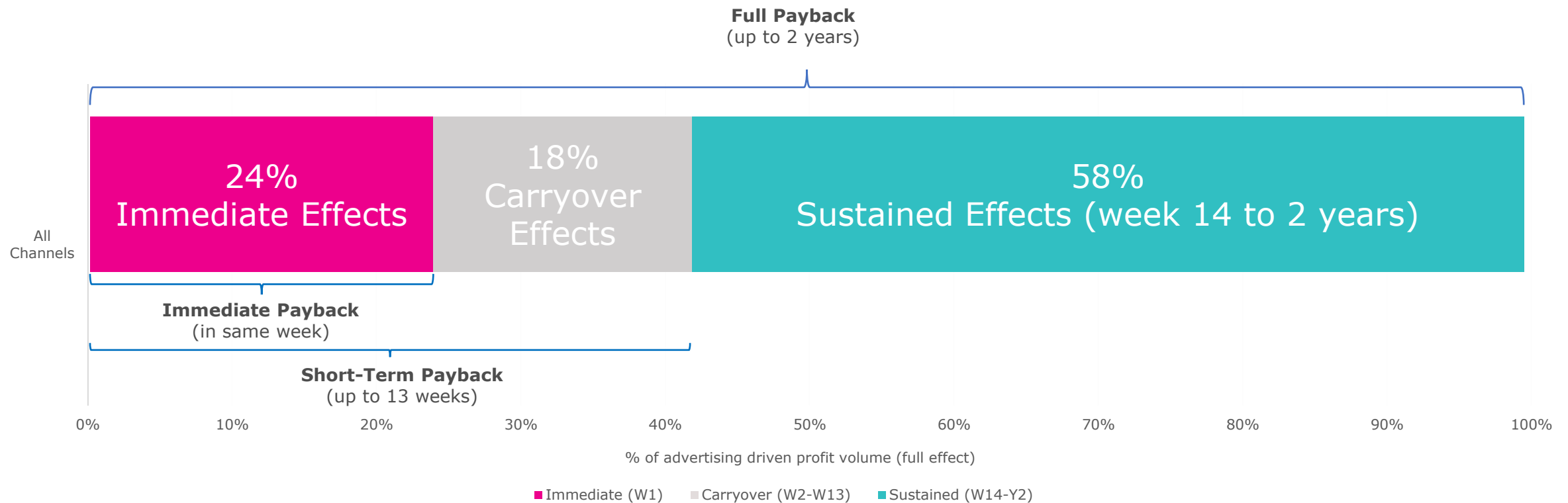


TV over-indexes on profit vs spend



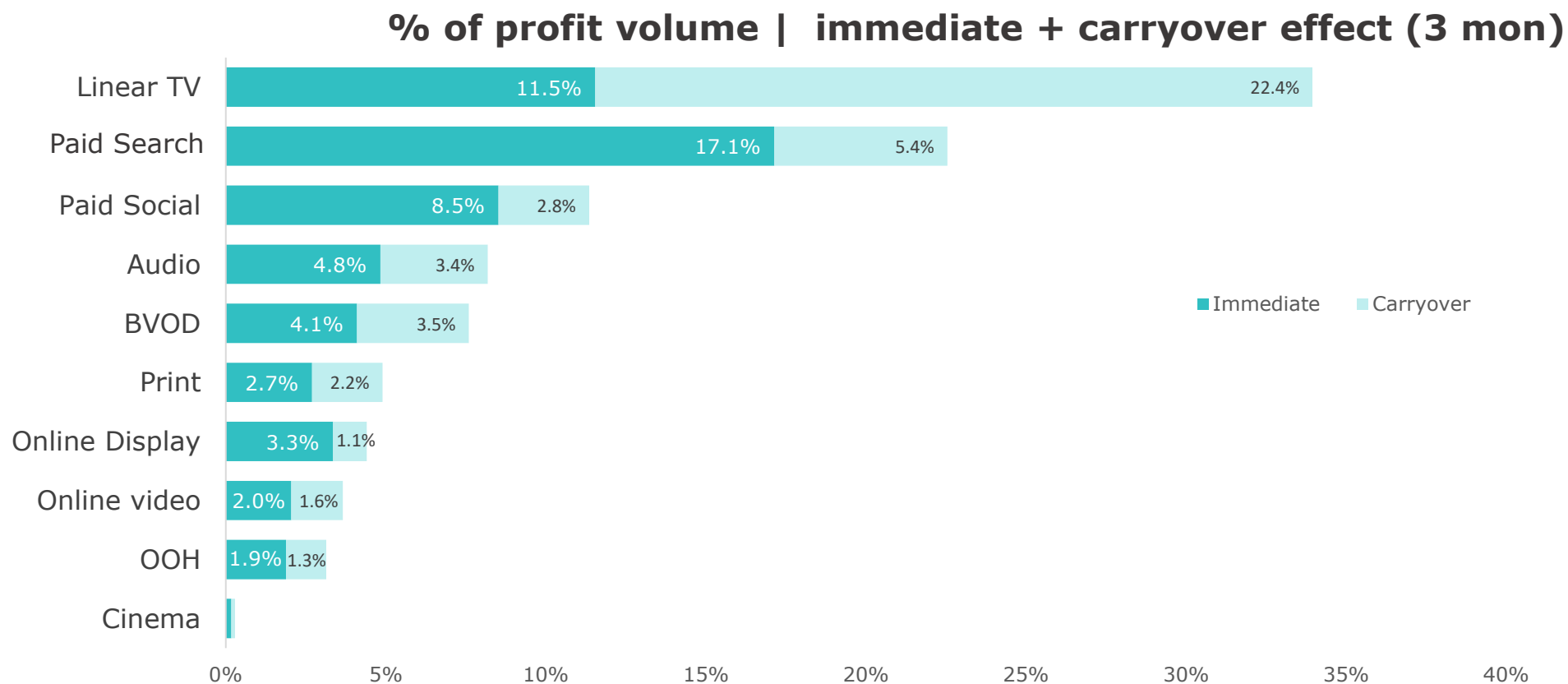
advertising **works** in the short and long term

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



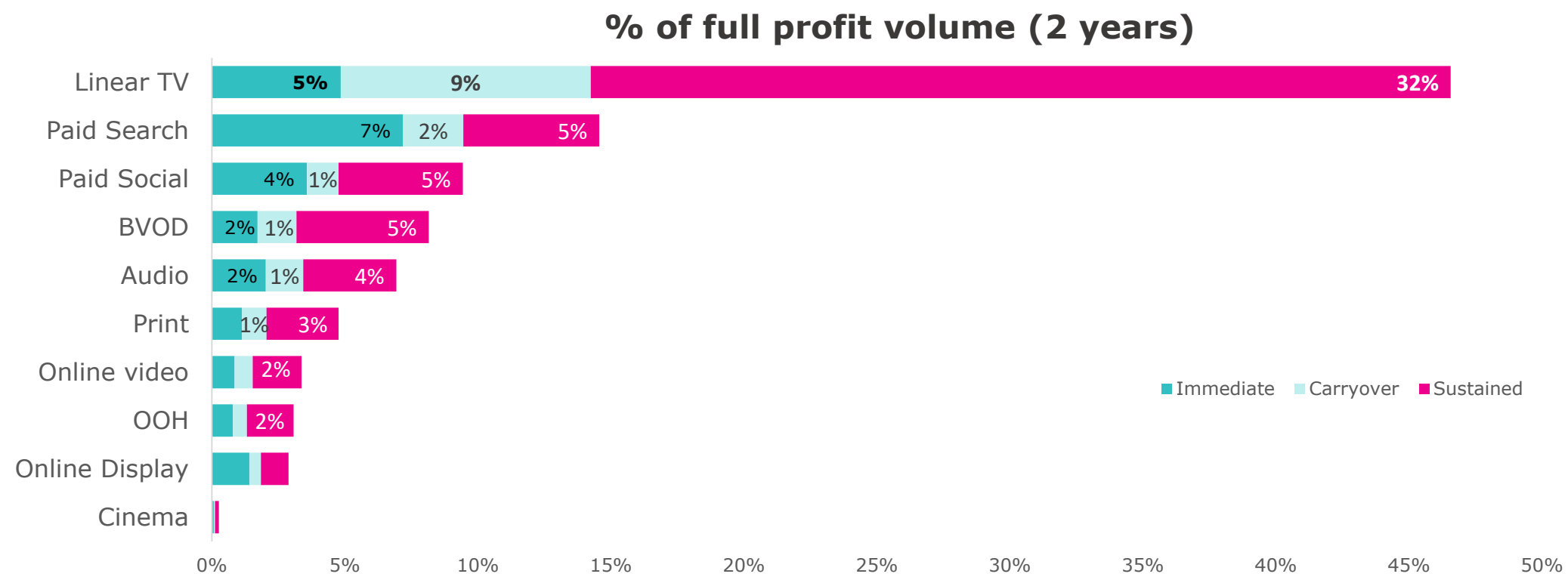
Source: [Profit Ability 2](#), April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.
Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK

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

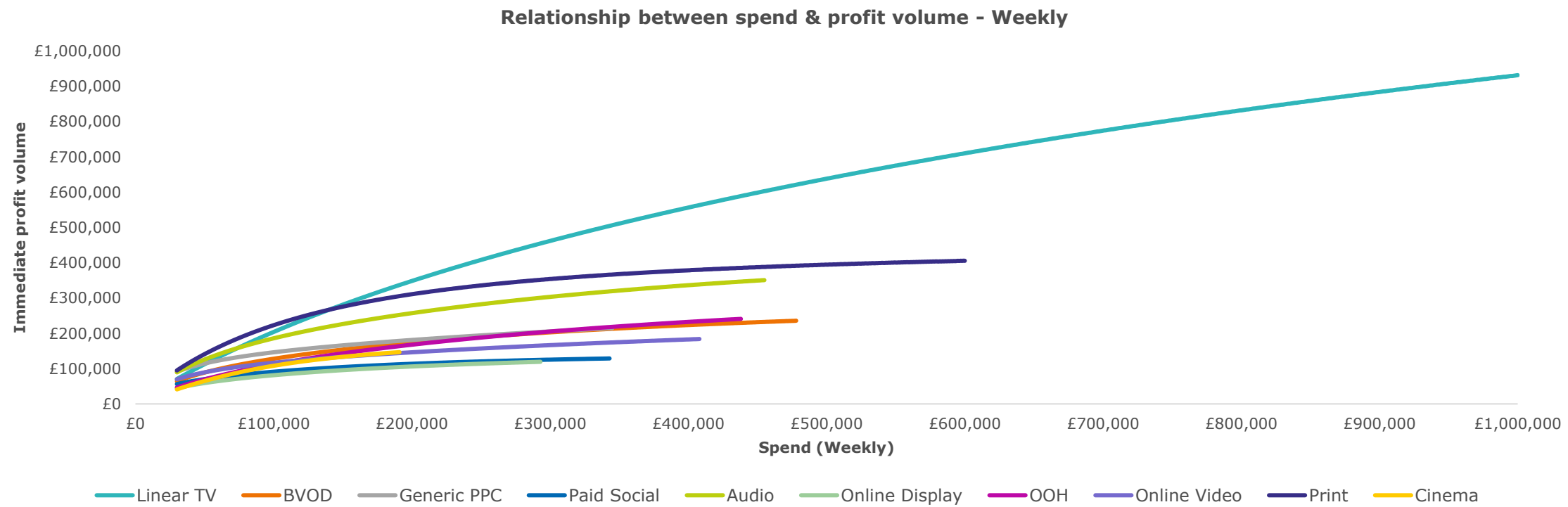
linear TV is unmatched as the total profit volume driver in the long term



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

TV has massive 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 advertising drives sales

campaign-level proof of TV's short-term effectiveness

New research using deterministic exposure & purchase data quantifies TV's short-term impact on sales, buyers, and conversion

90%

of CPG campaigns drove measurable sales lift

19%

average incremental sales lift

7%

increase in incremental new purchasers

Brand-level results were even more striking:

Facial tissue brand

+47%

sales lift during flight

Allergy medication brand

+35%

sales lift during flight

Pain reliever brand

+27%

sales lift during flight

TV advertising drives **foot traffic**

campaign-level proof of TV's short-term effectiveness

Detailed analysis compared retail visits of exposed households to unexposed households across restaurant, retail, pharmacy, and grocery categories

2 in 3

**campaigns drove
incremental store visits
in the short term**

Sit-down pizza restaurant

2x

more likely to visit, turning January – a slow month – into a traffic win

Steak restaurant

+54%

lift in traffic during a competitive dining period

Sit-down restaurant chain

+22%

lift in traffic, showing TV fills tables as well as campaign objectives

Drug store chain

+34%

lift across multiple campaigns in a crowded pharmacy landscape

Sit-down family restaurant

+42%

lift during Thanksgiving, a key seasonal event

Discount grocery chain

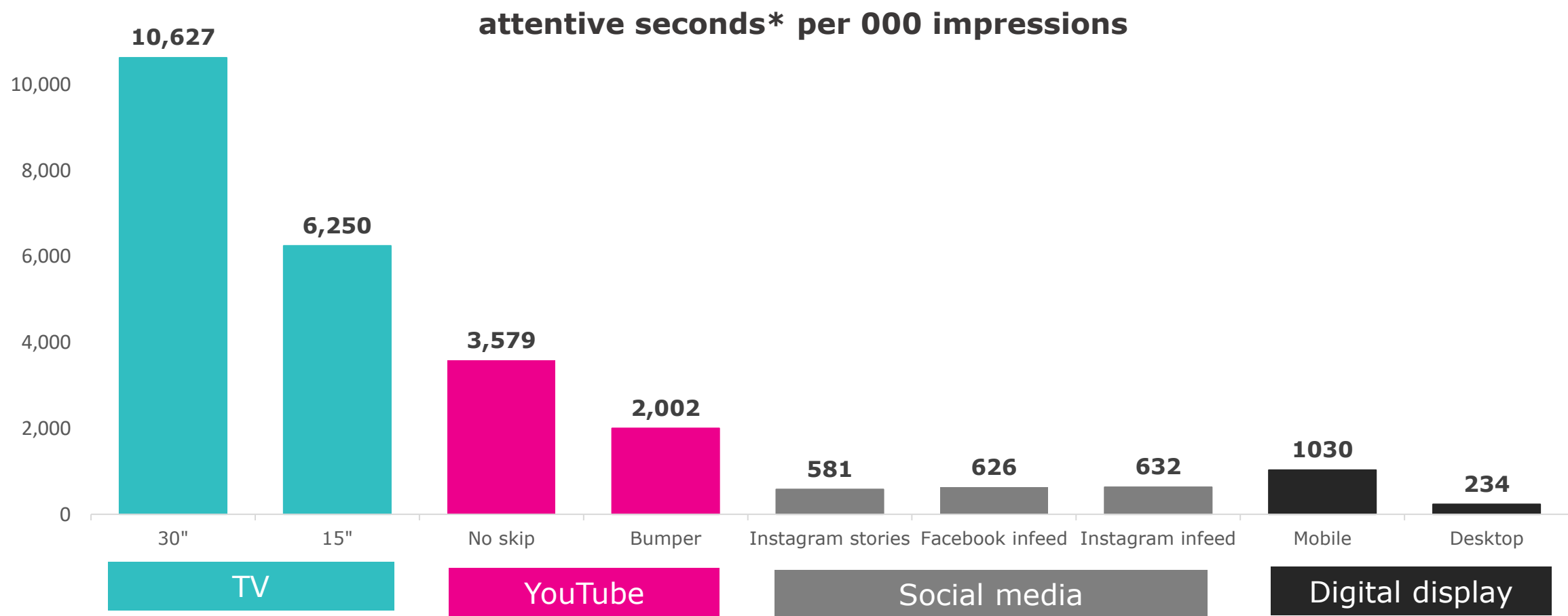
+41%

lift in traffic, moving even the most price-conscious shoppers

➡ IMPACT

With **superior attention** and **trust**, TV doesn't just reach audiences, it moves them.

TV ads deliver the most “attentive seconds”

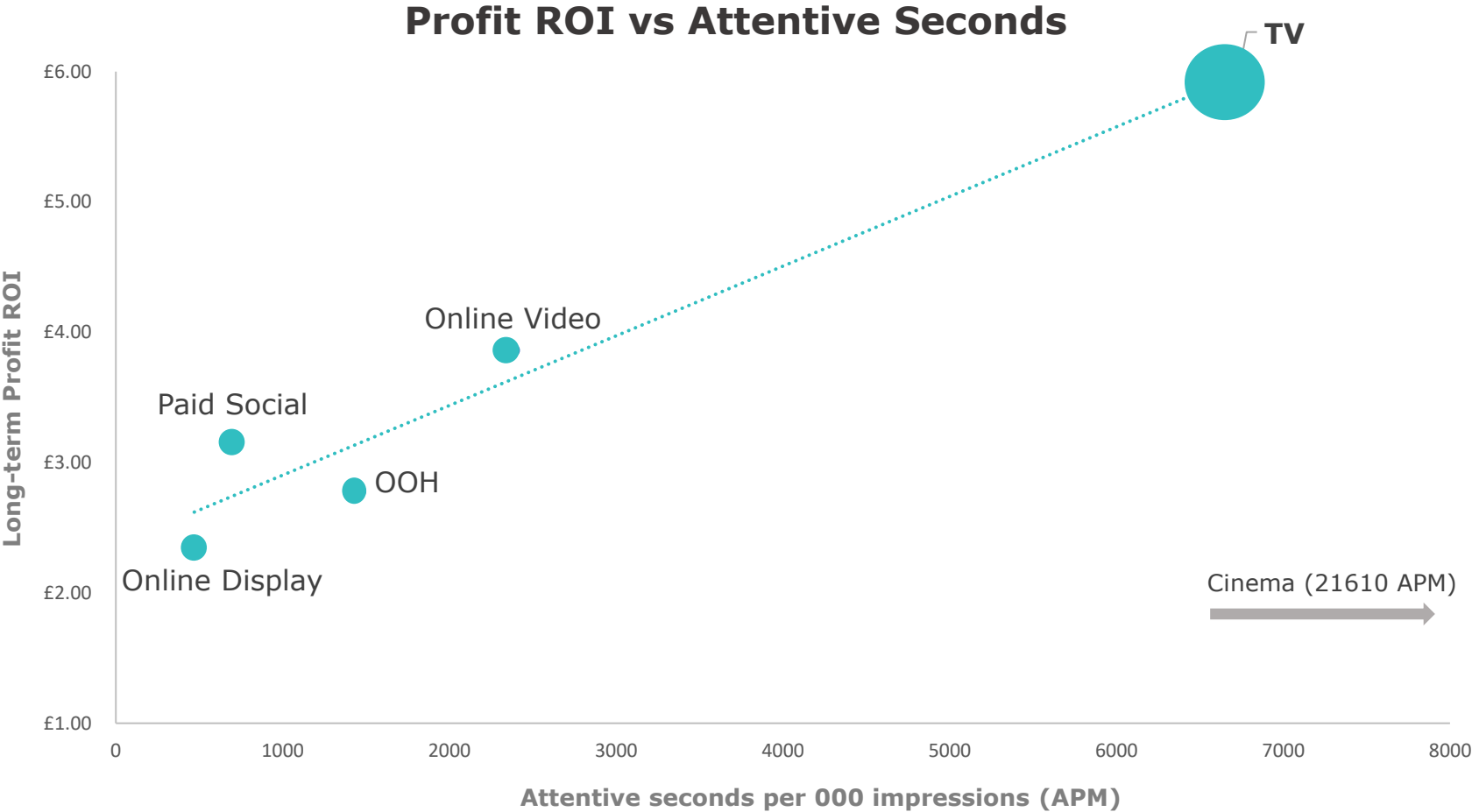


Source: Ebiquity, with Lumen, TVision and Dan White – The Challenge of Attention, 2024
* “attentive seconds” = the actual time an ad is viewed by a person.

TV delivers superior attention

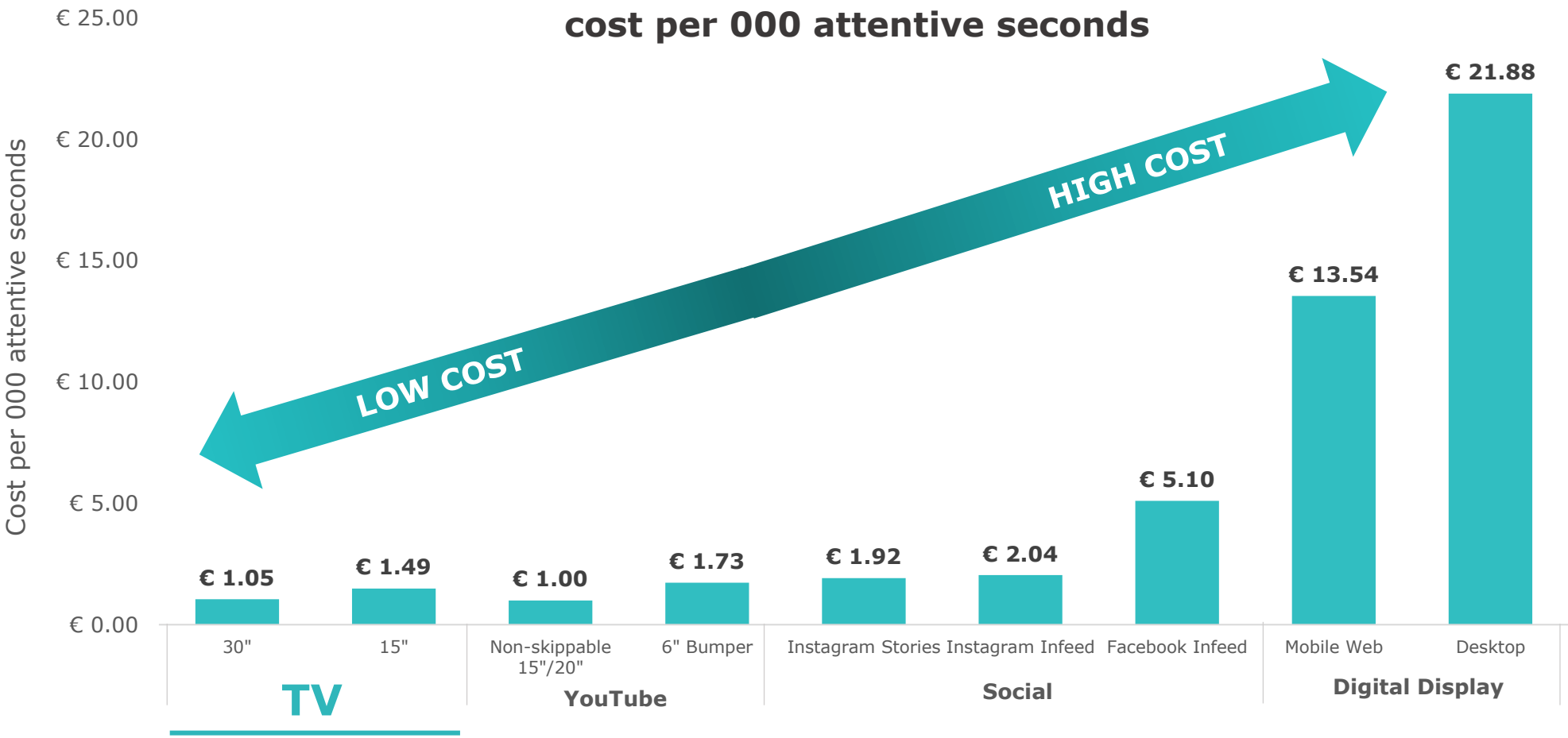
how does this play out in media?

Ebiquity and Lumen found a strong correlation between attentive seconds and incremental profit across media channels, with TV delivering a far superior attentive seconds per impressions than online video or paid social advertising



Source: Lumen & Ebiquity "[Maximizing Profit through Attention](#)", 2024

TV is an attention bargain

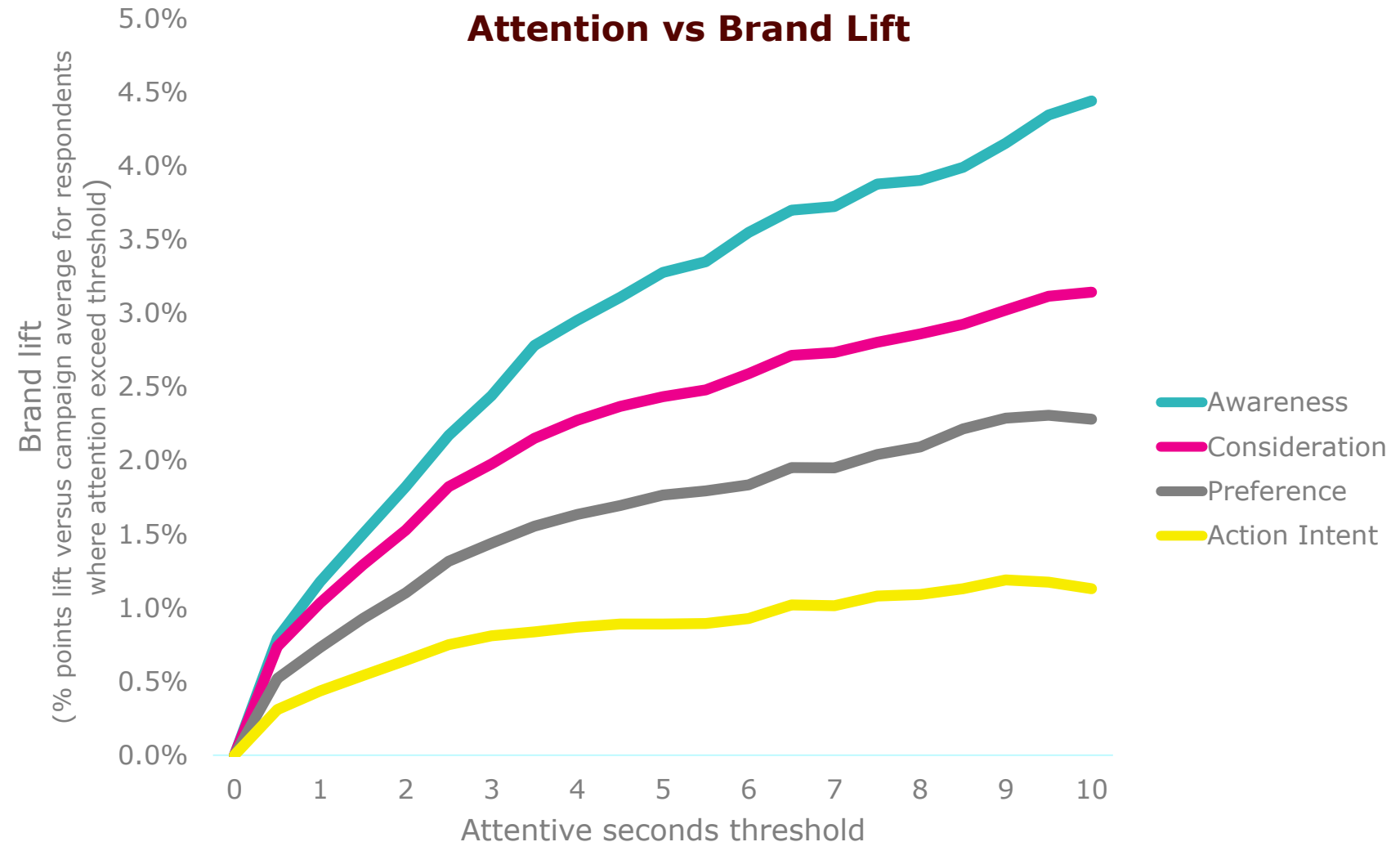


Source: Lumen [The True Cost of Advertising Attention](#)

attention drives impact

there is a clear relationship between attention and full funnel brand outcomes

this Lumen Havas analysis shows that the longer an audience pays attention to an ad, the greater the increase in brand awareness, consideration, preference and action intent



the **big screen** delivers more **attention**



TV ENVIRONMENT DELIVERS

Higher ad recall than computer screens

The big screen creates stronger memory encoding

+ 34%

Higher ad recall than mobile devices

Mobile is distracted and divided, TV is not

+ 60%

More attentive seconds than social media

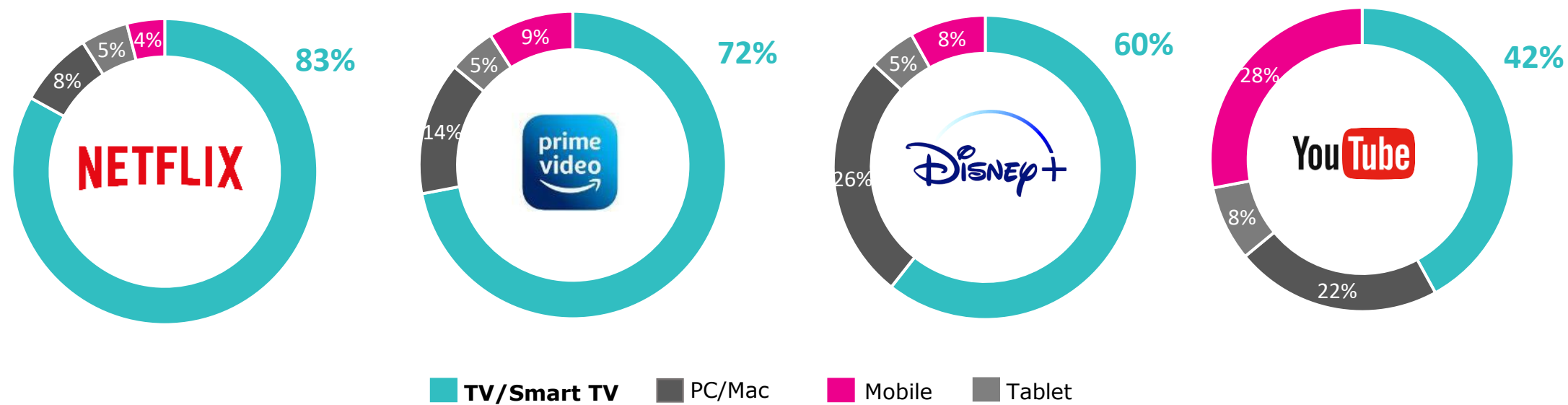
Attention is the multiplier

+ 17x

big screen = big attention

TV screens are the preferred viewing platforms for both linear TV and premium streaming services - **but less so for YouTube**

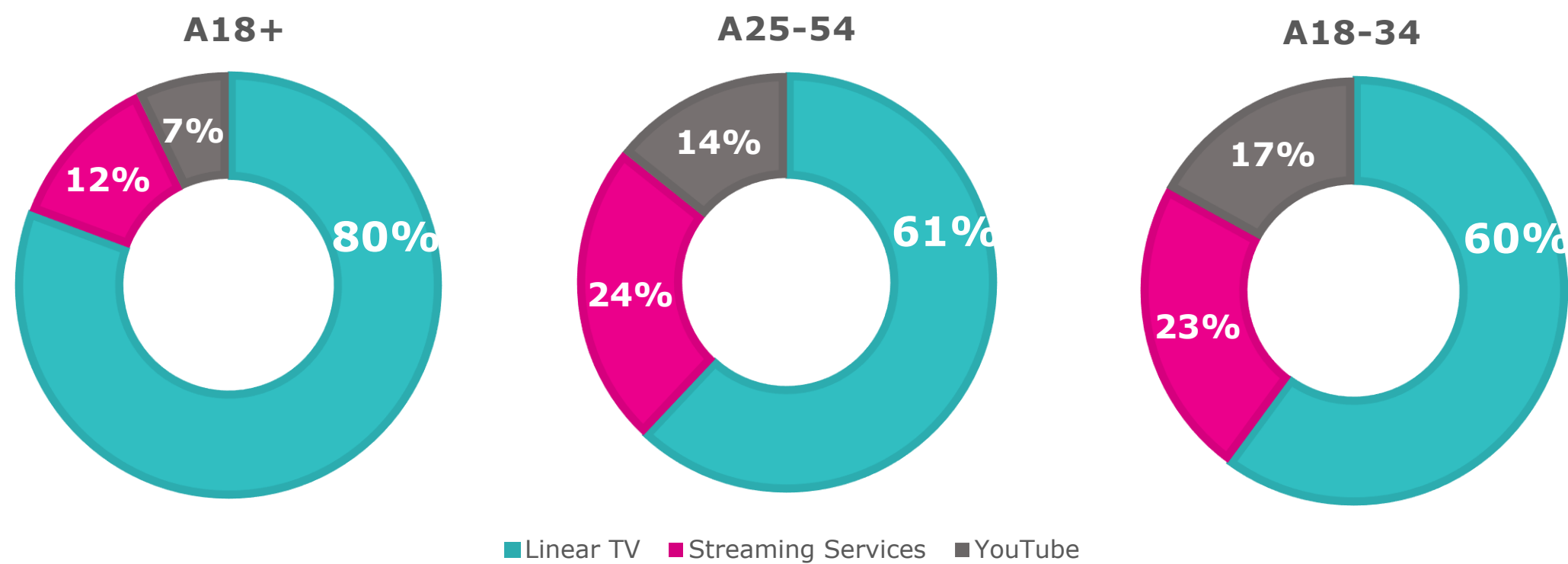
SHARE OF TUNING BY DEVICE



Source: Numeris VAM, 9/15/2025 to 5/31/2026 | Total Canada, Adults 18+ | Streaming Services, YouTube includes in-home viewing only

Linear TV makes up 80% of TV screen viewership

across all ages, linear TV makes up the majority of what we're watching on the big screen



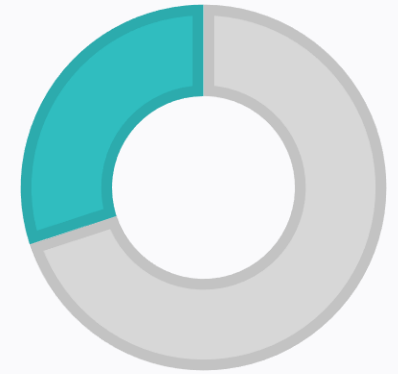
Note: Streaming Services include ad-free and ad-supported services as well as broadcaster streaming services
Source: Numeris VAM , 9/15/2025 to 5/31/2026, Total Canada | Total Time (hours) on a TV / Smart TV device. Excludes Facebook Video, Instagram Reels, TikTok; Streaming Services include broadcaster streaming services

TV makes other channels work harder

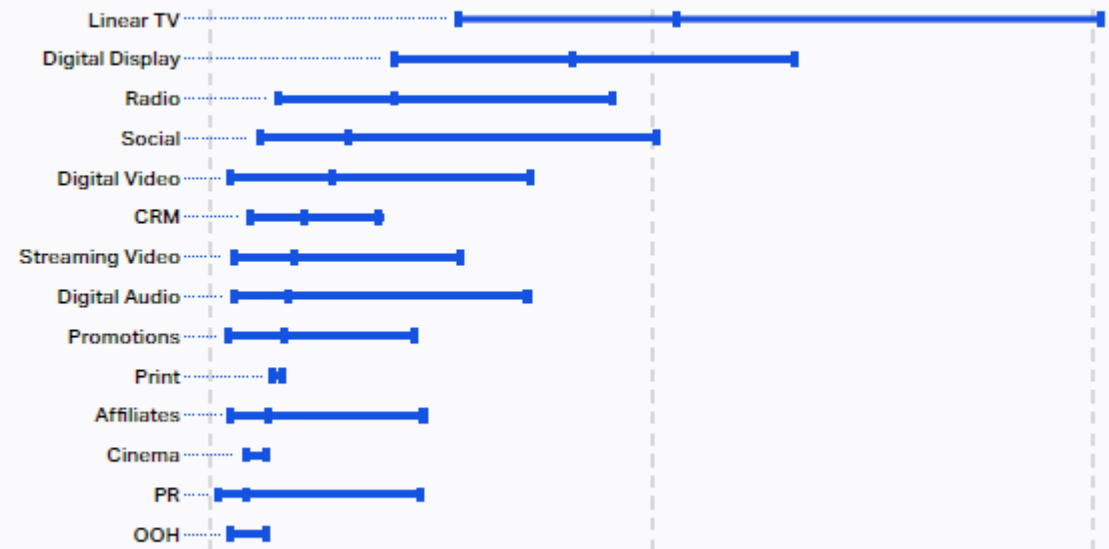
- Search is over-credited as a performance channel. **30%** of clicks are driven by other media. Another 30-60% are attributable to seasonality, loyalty, and category trends.
- TV leads the charts for other media that initiate search clicks
- TV generates the demand that other channels convert: emotion builds memory, and memory makes activation more efficient.

30%

of search clicks are due to other marketing channels



Drivers of clicks %



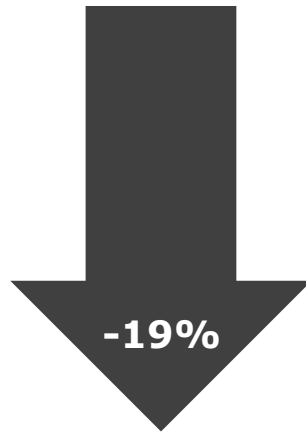
Source: Analytic Partners ROI Genome

TV improves digital performance

TV has a significant halo effect on digital media, increasing its sales ROI by 19%; accounting for the Halo Effect increases TV's sales ROI by 23%



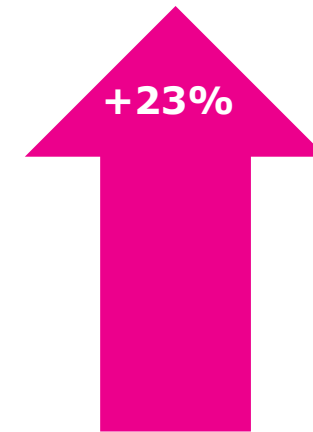
Standalone Digital ROI



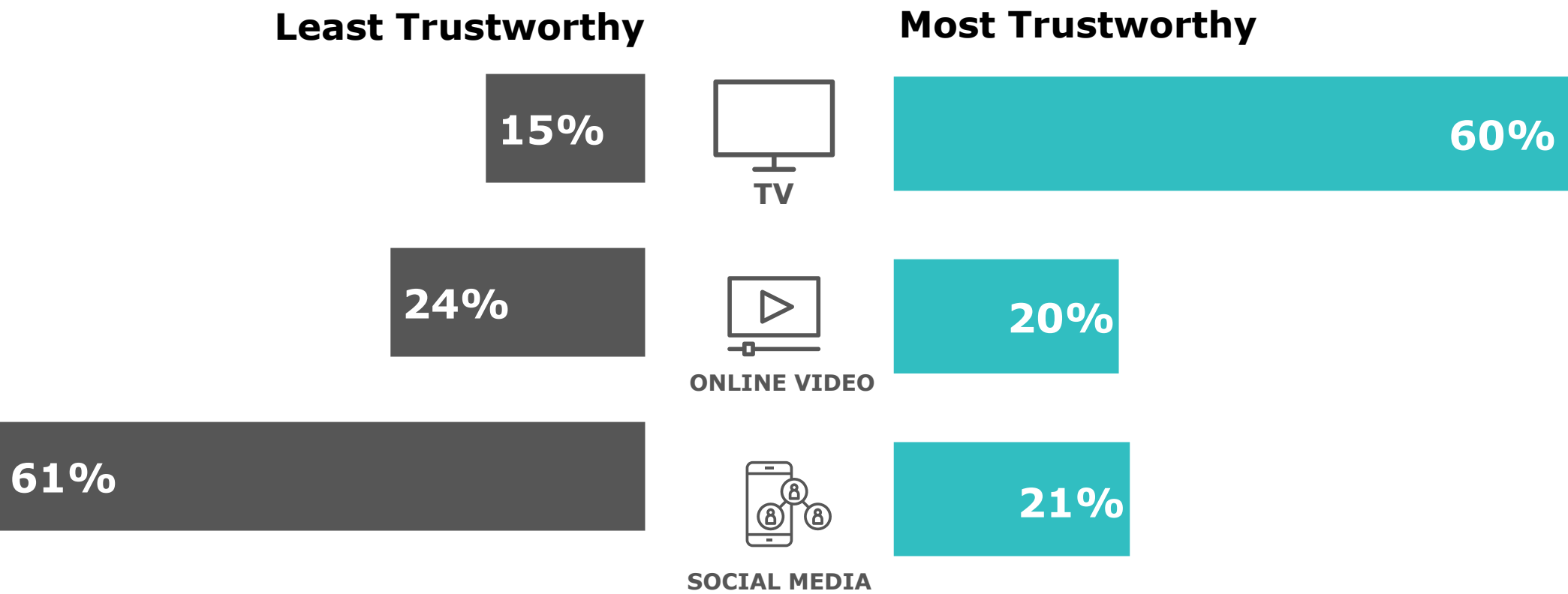
**without TV's
halo effect,
digital
advertising's
average ROI
would decline
by 19%**



TV's Adjusted ROI



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



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

Leo Burnett

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



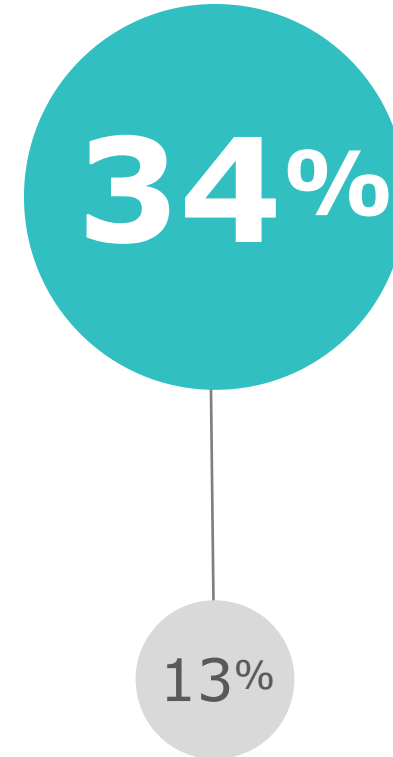
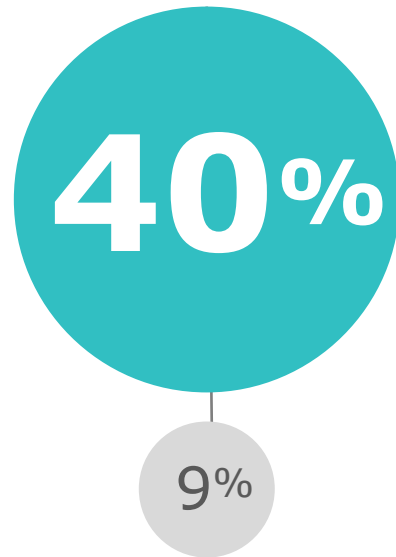
TV



YOUTUBE
(second highest)

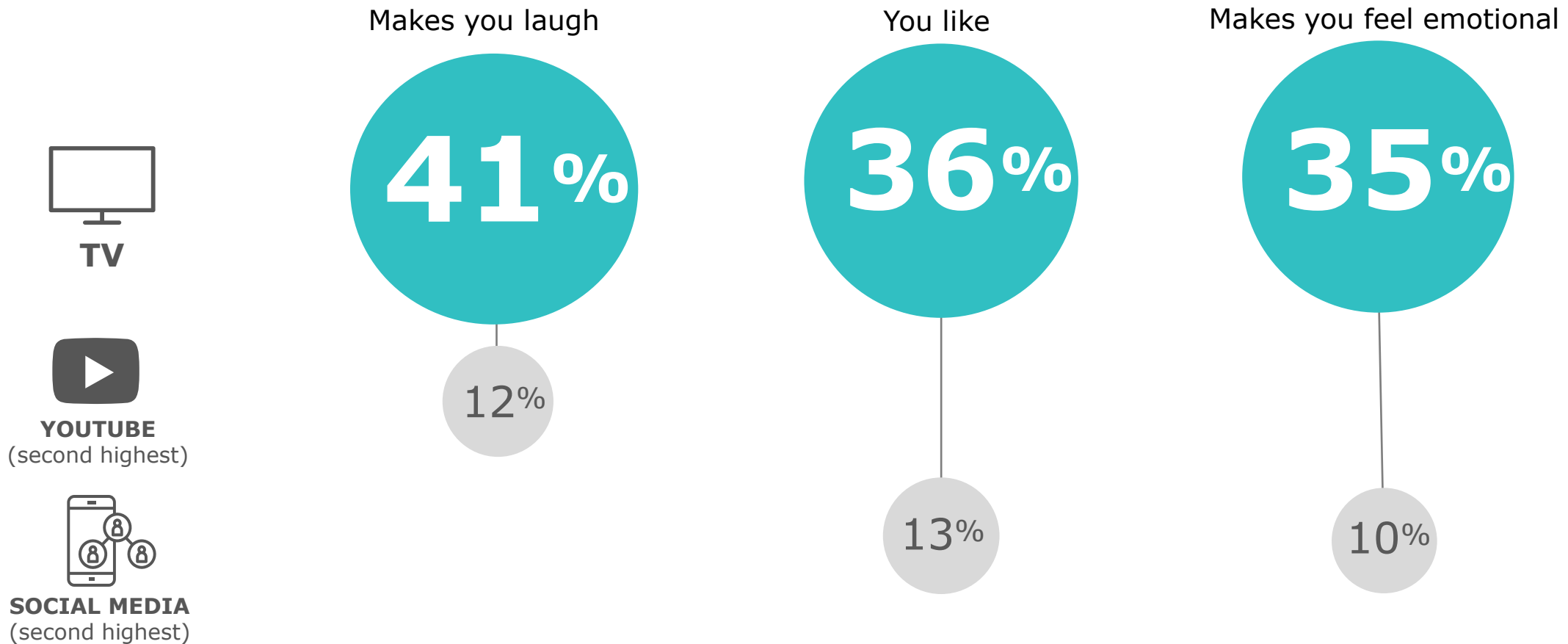


SOCIAL MEDIA
(second highest)



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 works **throughout** the funnel

Driving action at every stage of the customer journey

Top of the Funnel

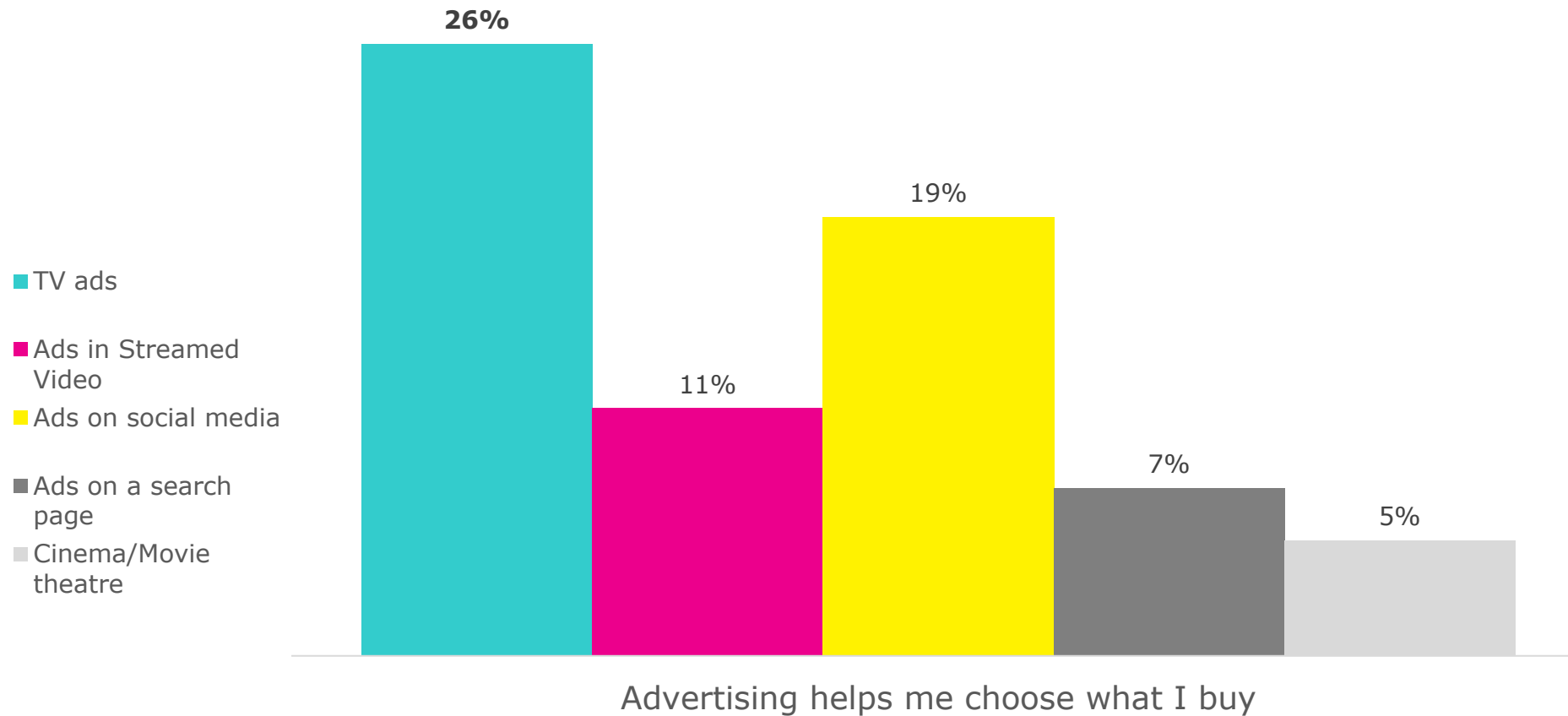
- Awareness
- Brand building
- Interest / purchase intent

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



Why TV?

SCALE

92% monthly reach and largest share of time spent with video

PROFIT

greatest long-term ROI, biggest contributor of profit, improves digital performance

IMPACT

greatest attention, recall, and trust

Source: SCALE: Numeris PPM, Total Canada, 09/15/25 to 05/31/2026, linear TV reach; Numeris VAM, 9/15/2025 to 5/31/2026, Total TV time spent | Adults 18+

Source: PROFIT: Miix Analytics analysis, September 2025 | Accenture Canadian Media Attribution Study 2019

Source: IMPACT: Ebiquity, with Lumen & TVision – The Challenge of Attention | Ad Nation Canada, Ipsos, 2023 | YouGov survey, Total Canada, A18+, July 2024



“ You must have TV in your consideration set ... TV continues to represent a significant majority slice of video for most demographics. ”

Mark Ritson

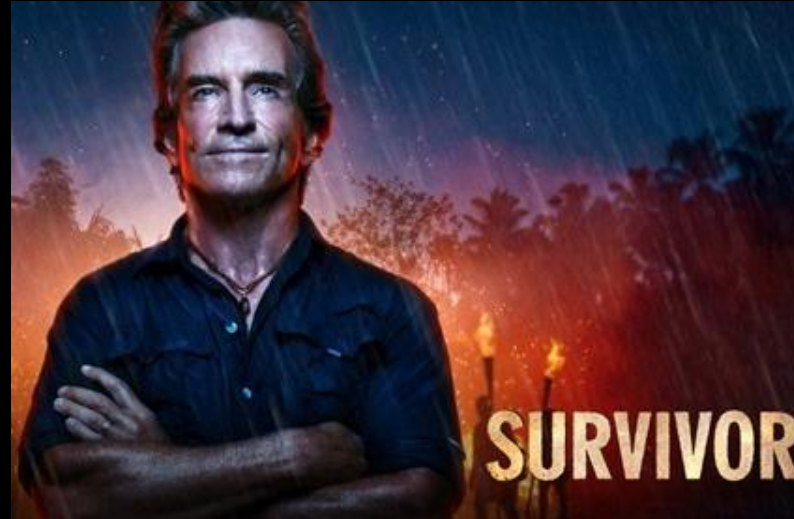
Marketing & Branding Expert,
Consultant, Columnist, and Professor

➤ **appendix**

what Canadians are watching



what are Canadians watching?



top 10 TV shows (English, ex-sports)

ADULTS 18+	Channel	AMA (000)
ACADEMY AWARDS	CTV	2671
HIGH POTENTIAL	CTV	1431
GOLDEN GLOBE AWARDS	Citytv	1400
THE AMAZING RACE CANADA	CTV	1346
NCIS: CROSSOVER	Global	1183
9-1-1	Global	1138
SURVIVOR	Global	1098
MATLOCK	Global	1081
ELSBETH	Global	1037
LAW & ORDER TORONTO	Citytv	1025

ADULTS 25-54	Channel	AMA (000)
ACADEMY AWARDS	CTV	918
GOLDEN GLOBE AWARDS	Citytv	543
THE AMAZING RACE CANADA	CTV	428
SURVIVOR	Global	399
SATURDAY NIGHT LIVE	Global	358
NCIS: CROSSOVER	Global	343
HIGH POTENTIAL	CTV	336
9-1-1	Global	334
BIG BROTHER	Global	307
LAW & ORDER TORONTO	Citytv	286

ADULTS 18-34	Channel	AMA (000)
ACADEMY AWARDS	CTV	473
GOLDEN GLOBE AWARDS	Citytv	286
BIG BROTHER	Global	182
THE AMAZING RACE CANADA	CTV	176
SURVIVOR	Global	173
9-1-1	Global	156
SATURDAY NIGHT LIVE	Global	153
SURVIVOR FINALE	Global	152
911: NASHVILLE	CTV	136
HIGH POTENTIAL	CTV	136

Source: Numeris PPM, Total Canada, 09/15/25 to 5/31/2026, English Conventional Networks, National Eng Specialty Networks, Sports Excluded; No minimum airings

top 10 sports (English, ex-Olympics)

ADULTS A18+	Channel	AMA (000)
MLB WORLD SERIES	Sportsnet + Citytv	6491
NFL SUPER BOWL	TSN + CTV	4972
MLB ALCS (Blue Jays)	Sportsnet + Citytv	3159
CFL GREY CUP	TSN + CTV	2948
MLB ALDS (Blue Jays)	Sportsnet + Citytv	2491
NHL PLAYOFFS ROUND 3	Rogers Sports Network	1781
WJC:PLAYOFFS CANADA	TSN	1690
NHL PLAYOFFS ROUND 2	Rogers Sports Network	1473
WJC:PRELIM CANADA	TSN	1369
HNIC PRIME EAST	Rogers Sports Network	1222

ADULTS 25-54	Channel	AMA (000)
MLB WORLD SERIES	Sportsnet + Citytv	2791
NFL SUPER BOWL	TSN + CTV	2202
MLB ALCS (Blue Jays)	Sportsnet + Citytv	1385
MLB ALDS (Blue Jays)	Sportsnet + Citytv	995
CFL GREY CUP	TSN + CTV	981
WJC:PLAYOFFS CANADA	TSN	623
NHL PLAYOFFS ROUND 3	Rogers Sports Network	584
WJC:PRELIM CANADA	TSN	553
NHL PLAYOFFS ROUND 2	Rogers Sports Network	494
HNIC PRIME EAST	Rogers Sports Network	455

ADULTS 18-34	Channel	AMA (000)
MLB WORLD SERIES	Sportsnet + Citytv	1303
NFL SUPER BOWL	TSN + CTV	1163
MLB ALCS (Blue Jays)	Sportsnet + Citytv	663
CFL GREY CUP	TSN + CTV	421
MLB ALDS (Blue Jays)	Sportsnet + Citytv	384
WJC:PLAYOFFS CANADA	TSN	342
WJC:PRELIM CANADA	TSN	330
NHL PLAYOFFS ROUND 3	Rogers Sports Network	281
NHL PLAYOFFS ROUND 2	Rogers Sports Network	244
NHL PLAYOFFS ROUND 1	Rogers Sports Network	236

Source: Numeris PPM Total Canada, 09/15/25 to 5/31/2026 | CityTV/Fox feed included in MLB playoff simulcasts
Rogers Sportsnet Total used for NHL, Sportsnet National+ & SportsnetST for all other sports



MILANO CORTINA 2026

CANADIAN VIEWERSHIP HIGHLIGHTS

30.5M

viewers reached
across the Games

42.0M

hours of content
watched across
streaming platforms

8.7M

watched the
overtime hockey
gold medal goal

4.2M

watched the women's
hockey final minutes

3.5M

watched Canada
enter the opening
ceremonies

Source: CBC | Numeris TV PPM, February 6-22, 2026

Figures include viewership across CBC and Olympic parent networks including TSN & SportsNet

think^{tv}

let's go Blue Jays!

The 2025 World Series reached over **23 Million** Canadians.

The nail-biting Game 7 generated an incredible **10.74M AMA!**



in case you missed it

check out these additional research reports & presentations



outcomes video measurement

Environics Analytics' David Phillips shares a detailed analysis of TV campaign-level performance across a variety of brands and categories. The findings demonstrate that TV delivers value throughout the customer journey and drives tangible performance outcomes.

[learn more »](#)



the drivers of advertising creative

Mark Ritson unpacks the commercial, strategic, and psychological factors behind high-performing creative—and challenges marketers to rethink how they brief, evaluate, and invest in advertising.

[learn more »](#)



kickstarting the quality revolution

Erez Levin, media futurist and ad quality evangelist, explains why marketers need to move beyond simple reach and binary metrics like viewability to focus on media quality signals that better predict marketing outcomes.

[learn more »](#)



the eye-watering cost of dull media

Peter Field and Dr. Karen Nelson-Field's latest research project "The Extraordinary Cost of Dull" puts a dollar value (almost \$200 billion!) on invisible impressions and dull media, and identifies tactics to optimize media dollars.

[learn more »](#)



marketing effectiveness in Canada

Through extensive analysis of Canadian businesses' marketing plans, Miix Analytics quantifies the value of media spend, reveals the impact of each media channel, and uncovers opportunities to maximize return on media investment in Canada.

[learn more »](#)



spotlight on Quebec

French-speaking Canadians have a strong connection with TV. They watch more television and spend less time with streaming services than the average Canadian. Find out more about this unique market.

[learn more »](#)



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

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