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



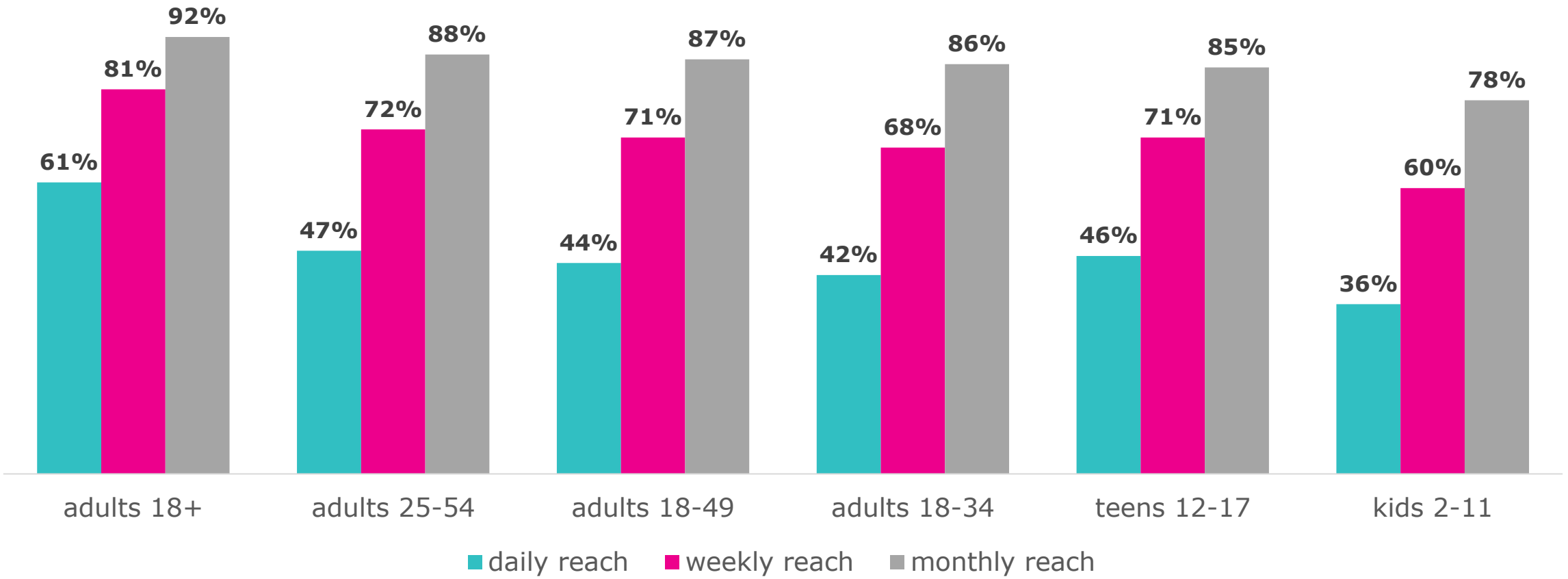


Marketing activities only build mental availability in the audience they reach.

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

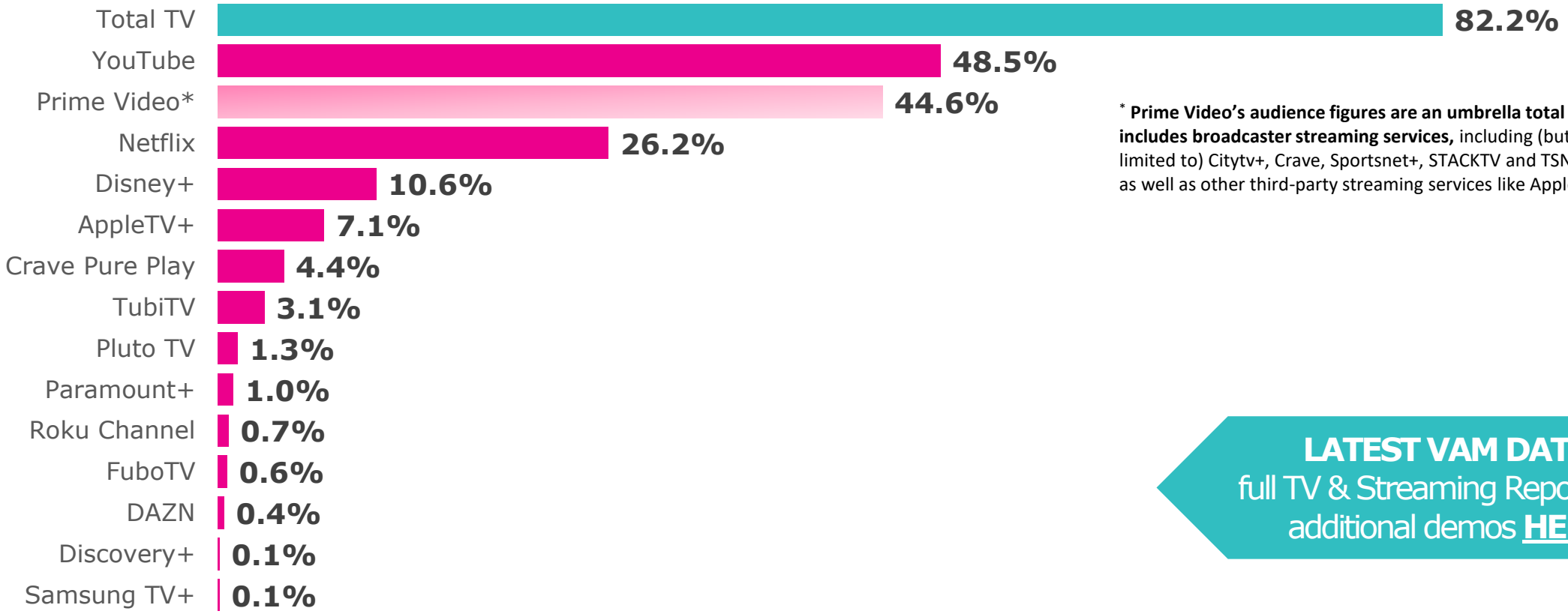


Source: Numeris PPM, Total Canada, 09/15/25 to 05/31/2026
Linear TV = viewing to any live broadcaster content (streamed on any platform and linear TV) plus any broadcaster content recorded on PVR (with commercial load intact) that is viewed within 7 days of initial broadcast. Does not include on demand streaming.

Total TV delivers unmatched reach

AVERAGE WEEKLY REACH %

ADULTS 18+



* **Prime Video's audience figures are an umbrella total that includes broadcaster streaming services,** including (but not limited to) Citytv+, Crave, Sportsnet+, STACKTV and TSN & RDS, as well as other third-party streaming services like AppleTV+.

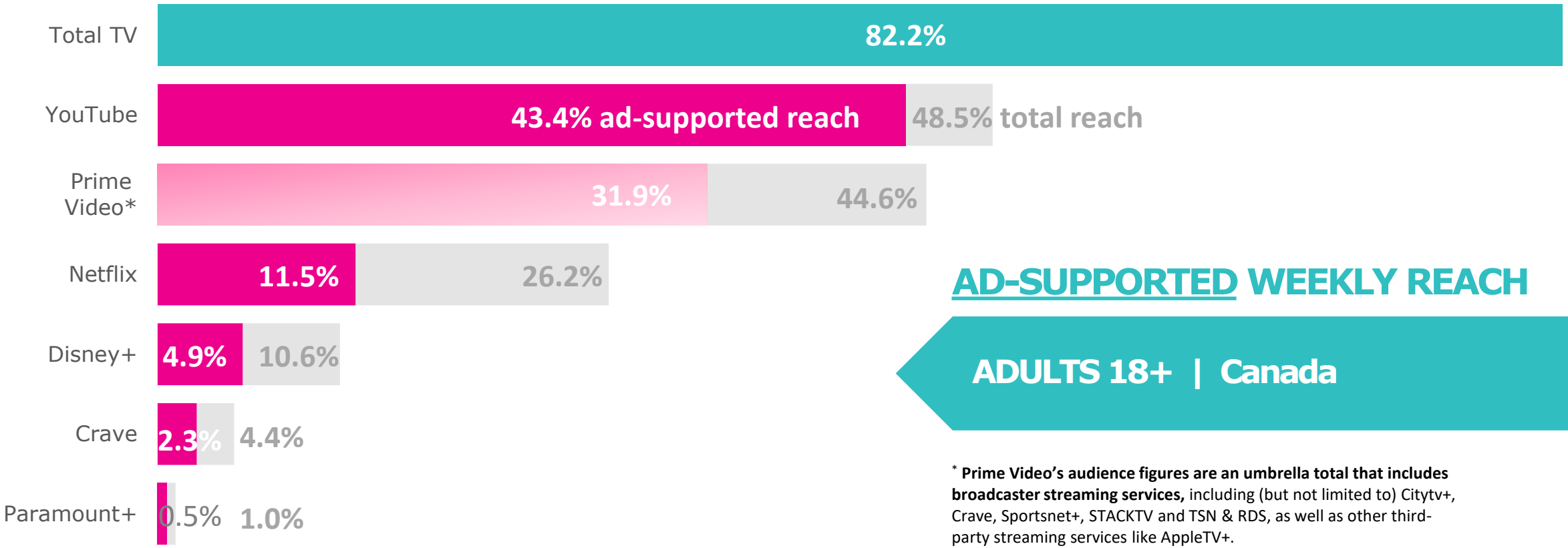
LATEST VAM DATA
full TV & Streaming Report with additional demos **HERE**

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)

think tv

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

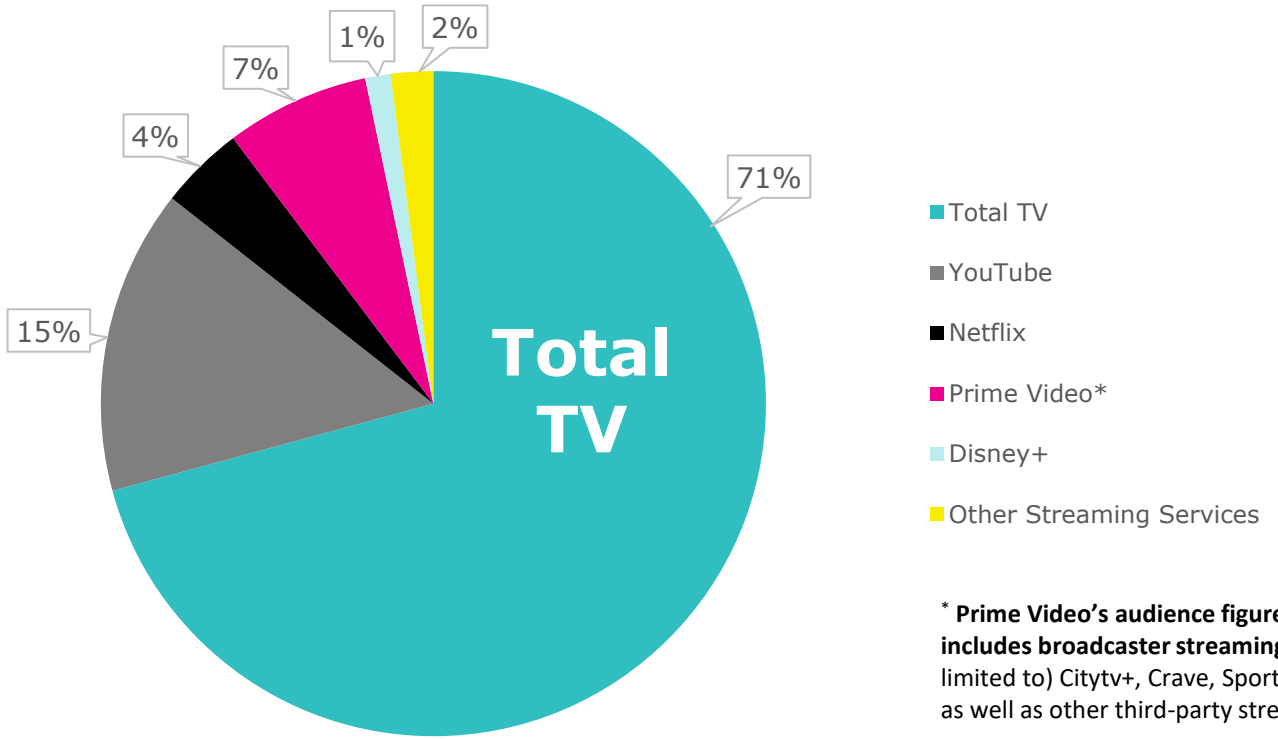
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Source: Numeris VAM, 9/15/2025 to 05/31/2026 , Canada
Total TV defined as linear TV and broadcaster streaming services | Streaming Services include ad-free and ad-supported services (in-home viewing only)
Ad Factors via Echo Intelligence Fall 2025

Total TV captures greatest share of time spent with video

SHARE OF VIDEO

ADULTS 18+



LATEST VAM DATA
full TV & Streaming Report Available
HERE

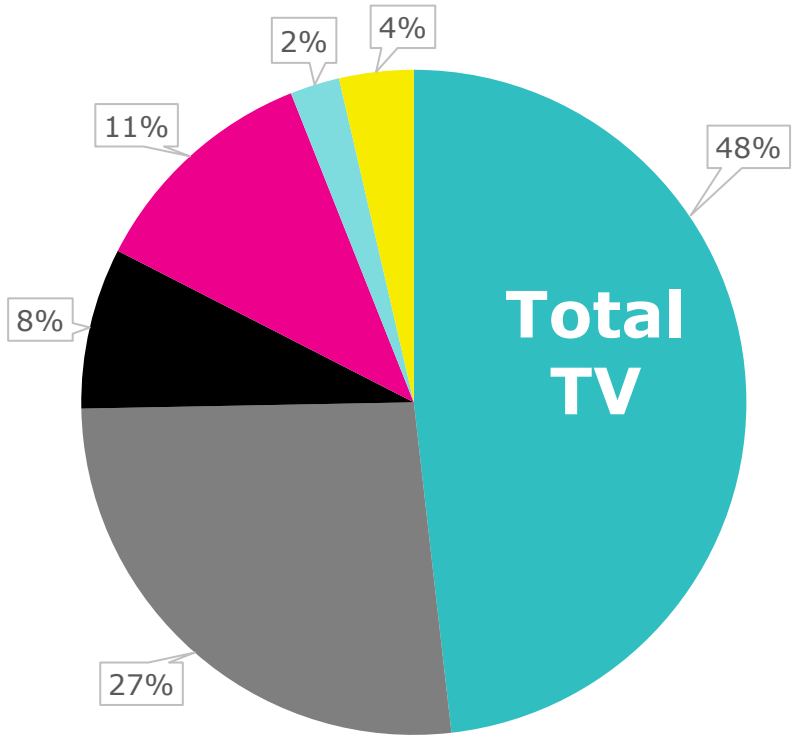
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Source: Numeris VAM, 9/15/2025 to 5/31/2026, Canada, all time spent per capita
Total TV defined as linear TV and broadcaster streaming services | Streaming Services include ad-free and ad-supported services (in-home viewing only)
Other Streaming Services: 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

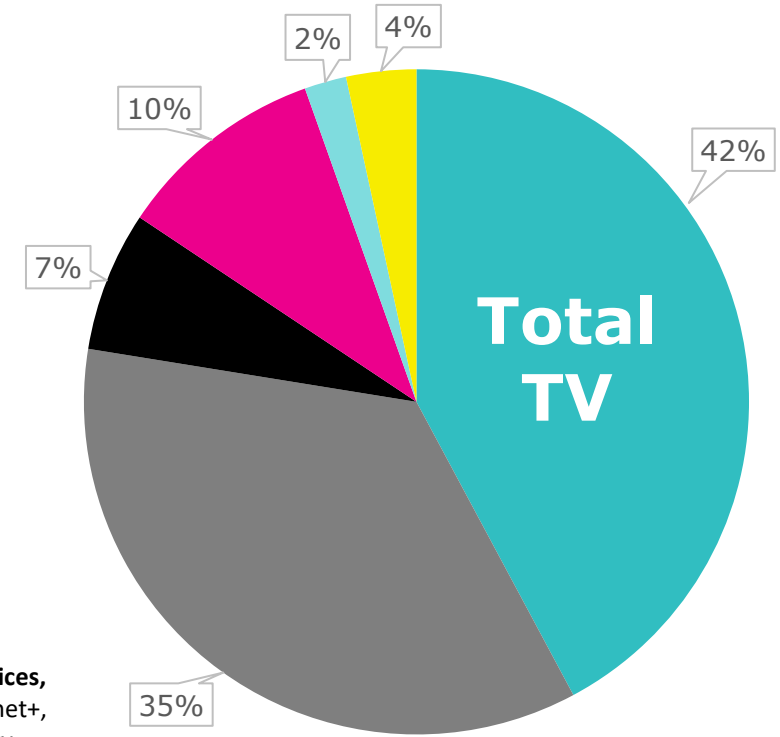
...across key demos

SHARE OF VIDEO

ADULTS 25-54



ADULTS 18-34



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

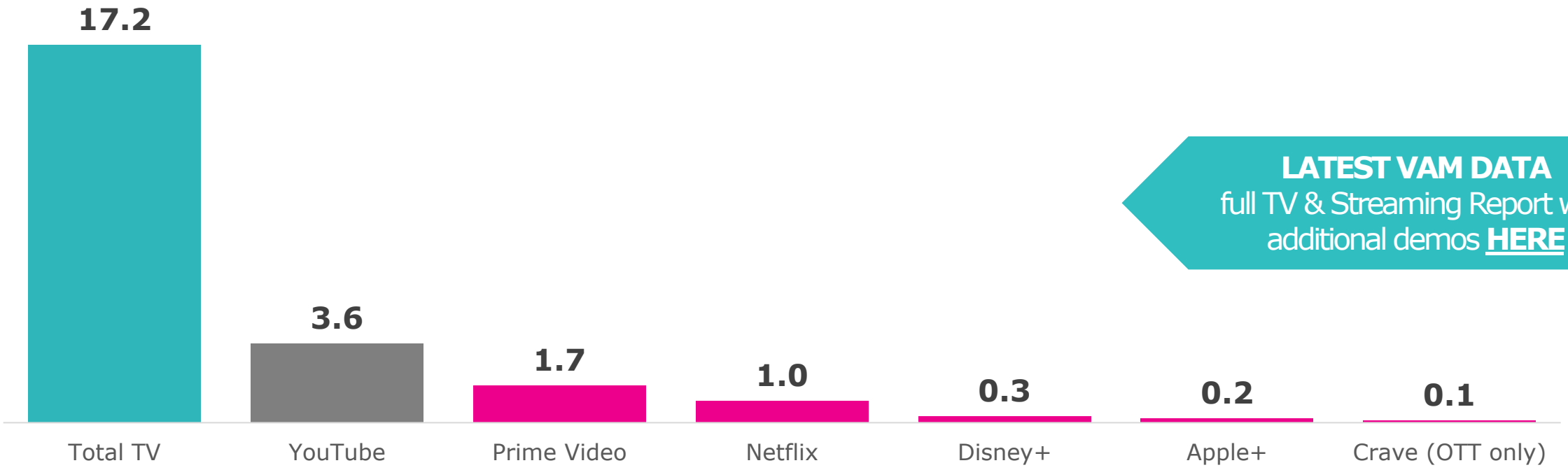
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Total TV dominates
time spent

AVERAGE WEEKLY HOURS

ADULTS 18+

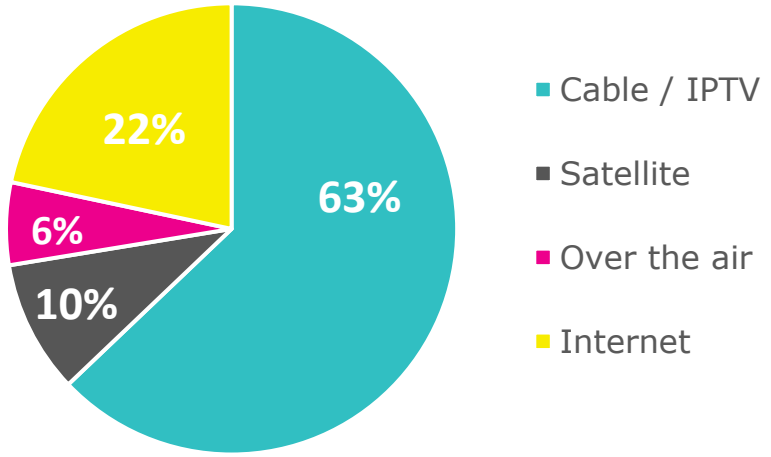


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access to TV is almost universal

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



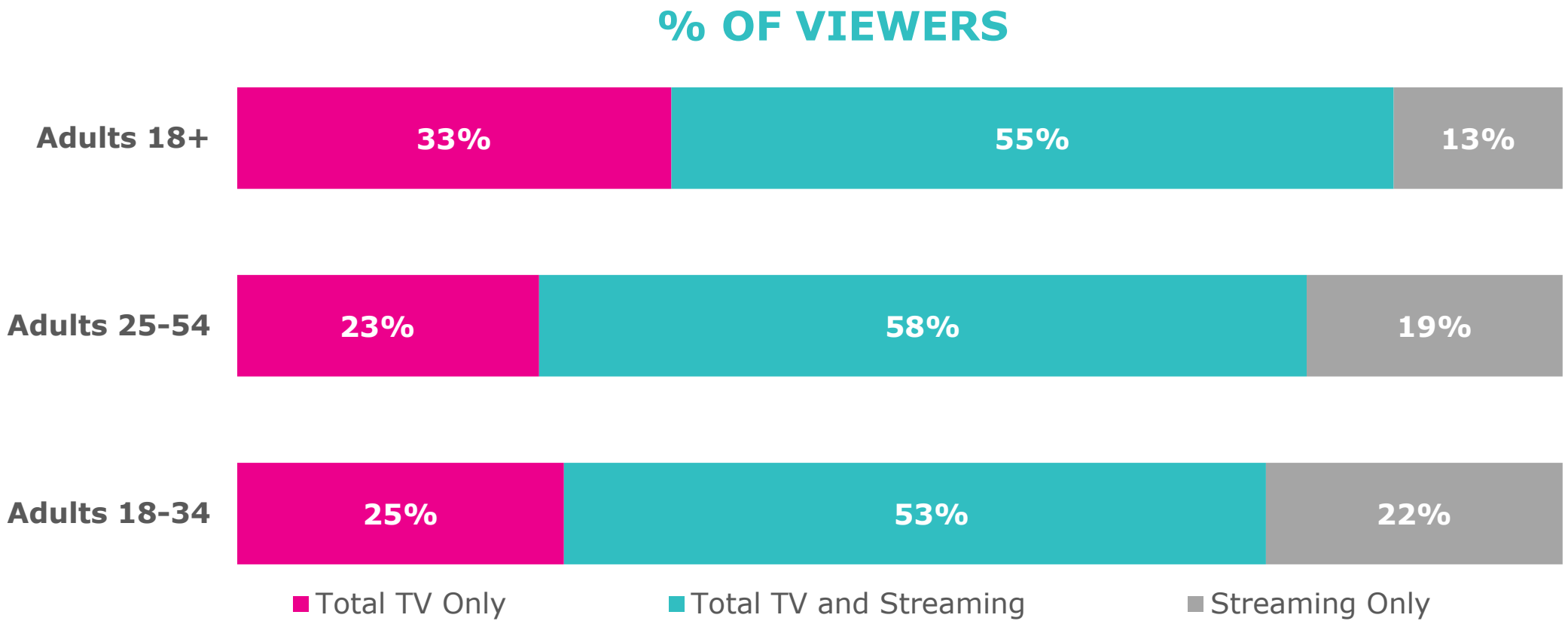
PAID TV SUBSCRIPTIONS
while household penetration of paid TV subscriptions remains strong in Canada, declining just 3.9% year-over-year, anyone with an internet connection has access to linear TV content

	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

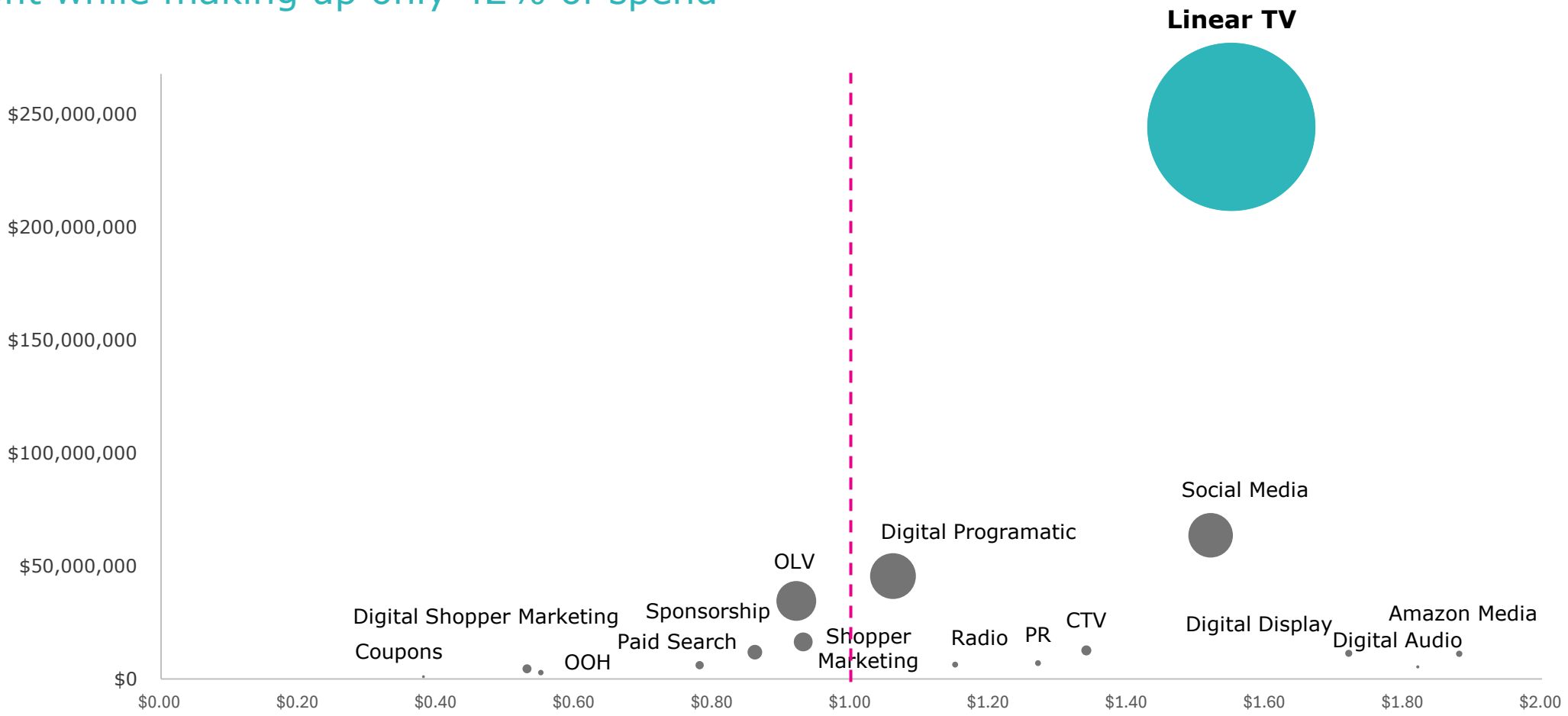
PROFIT

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



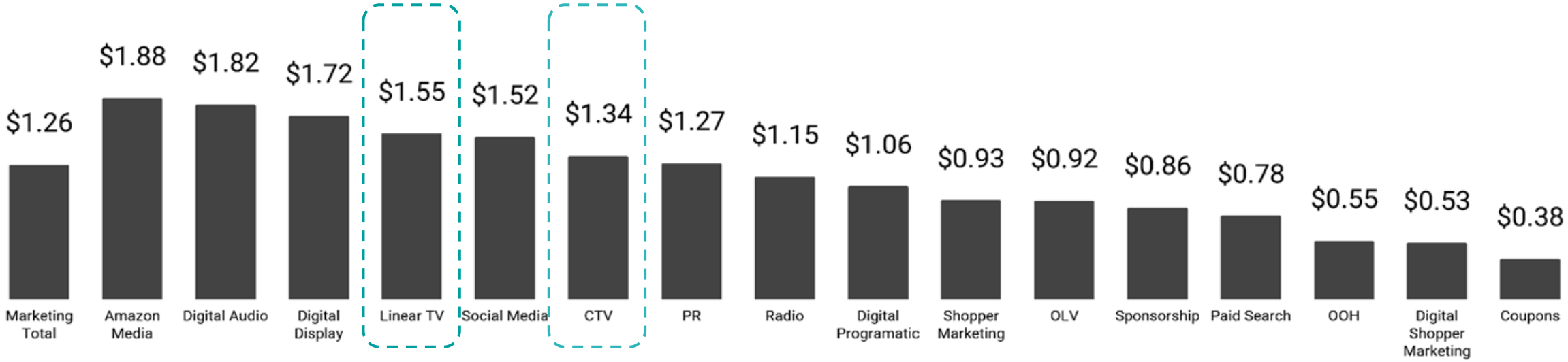
TV is the largest profit driver in Canada

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



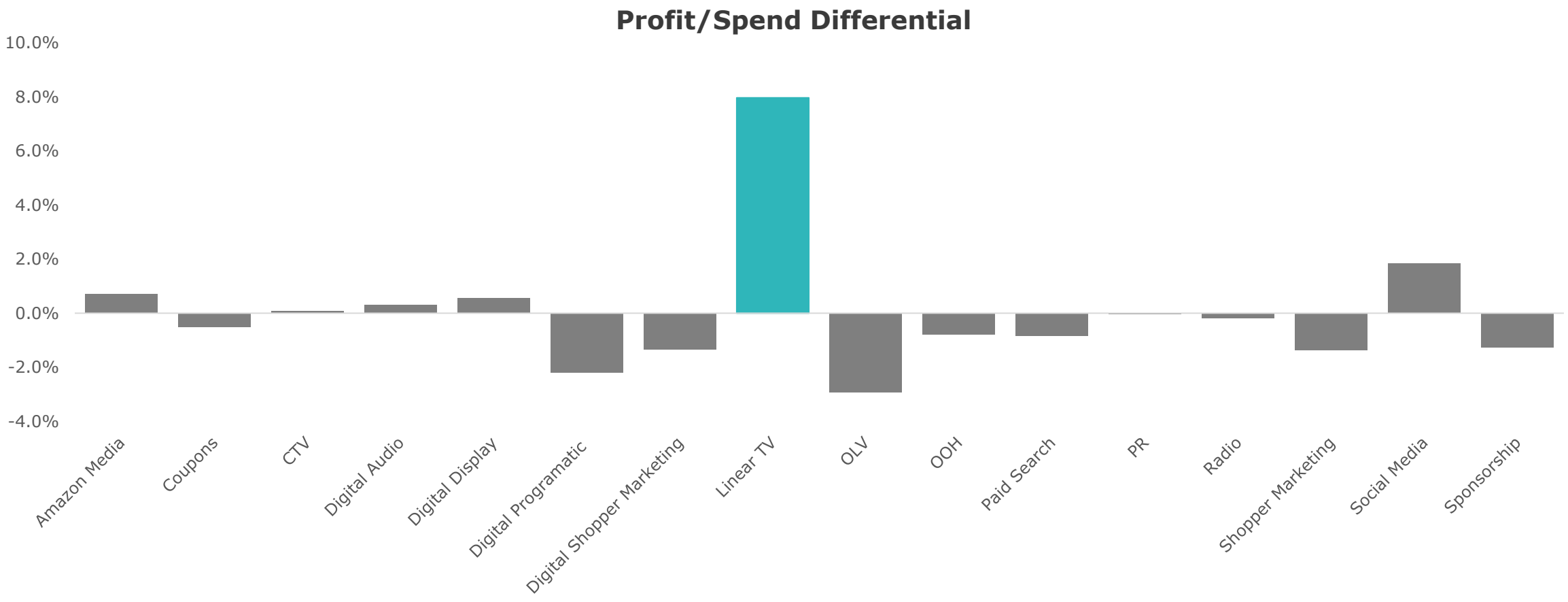
Source: Miix Analytics analysis, September 2025 | $45b in revenue and $621m in media spend analyzed, Canadian data

TV delivers impressive short term ROI



Source: Miix Analytics analysis, September 2025 | $45b in revenue and $621m in media spend analyzed, Canadian data

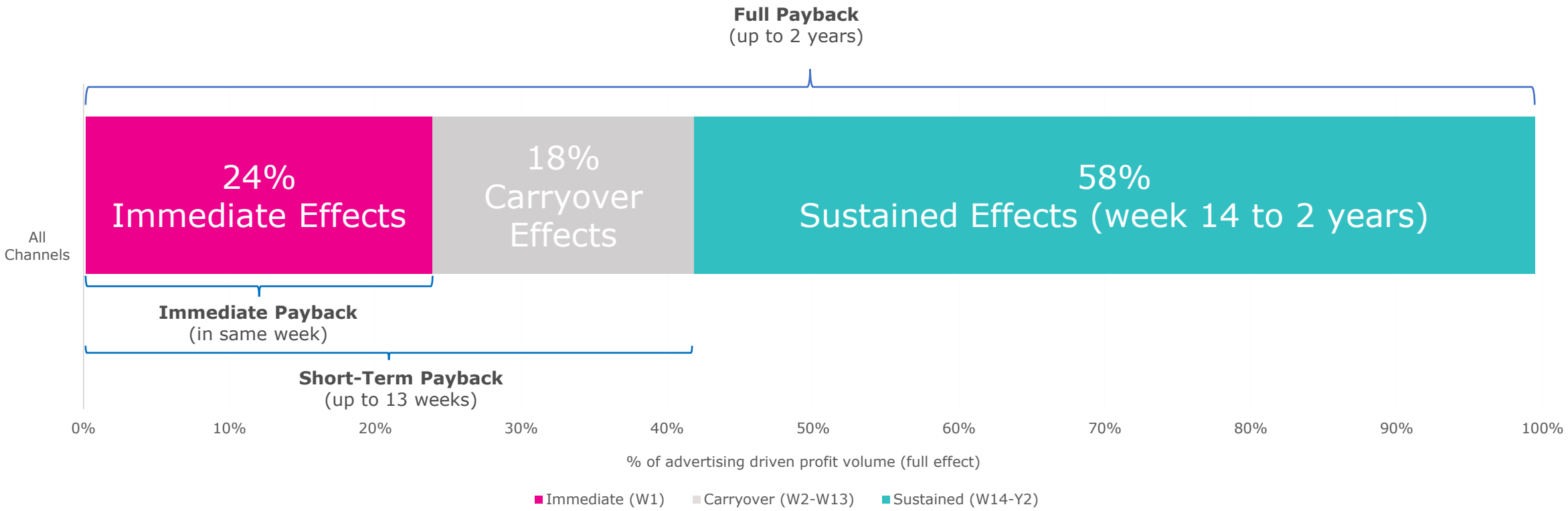
TV over-indexes on profit vs spend



Source: Miix Analytics analysis, September 2025 | $45b in revenue and $621m in media spend analyzed, Canadian data
Profit spend differential = % of channel profit generation - % of channel spend

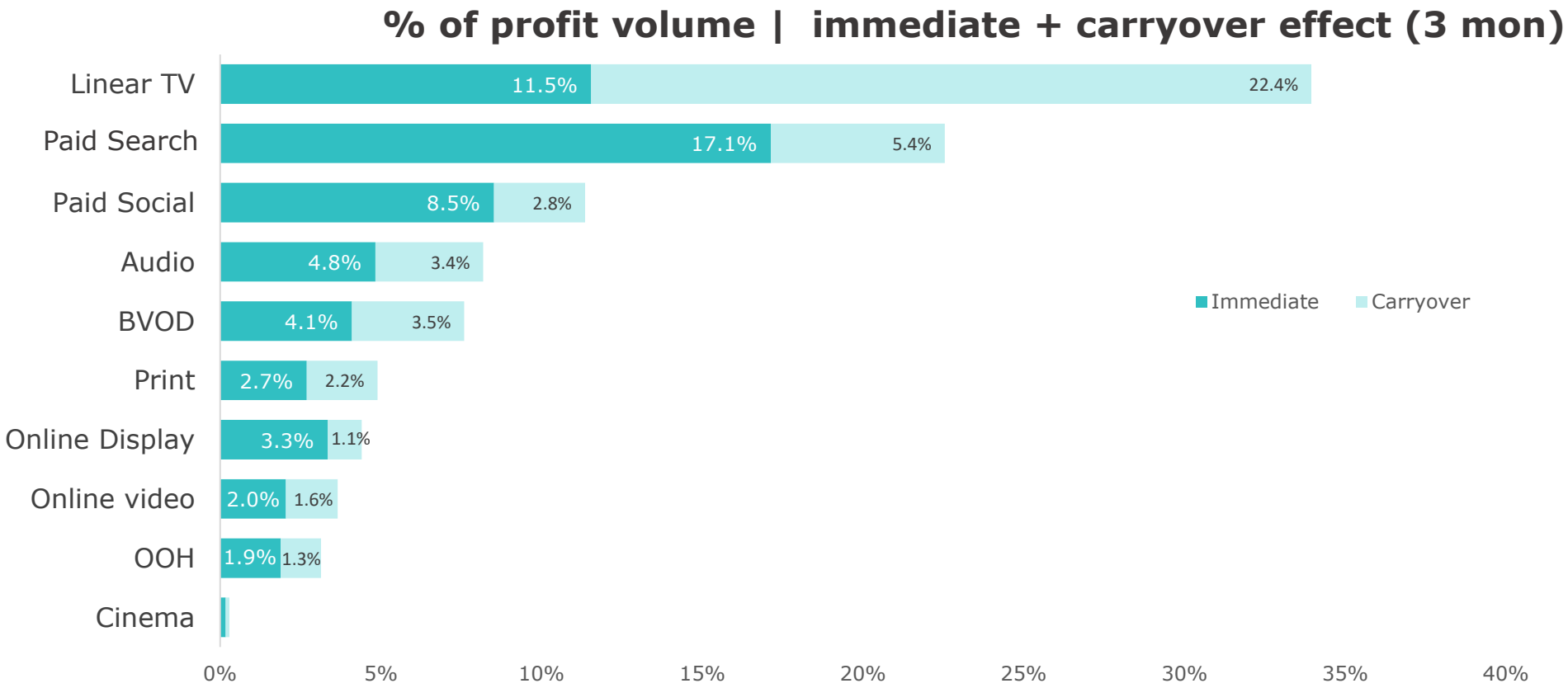
advertising works in the short and long term

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



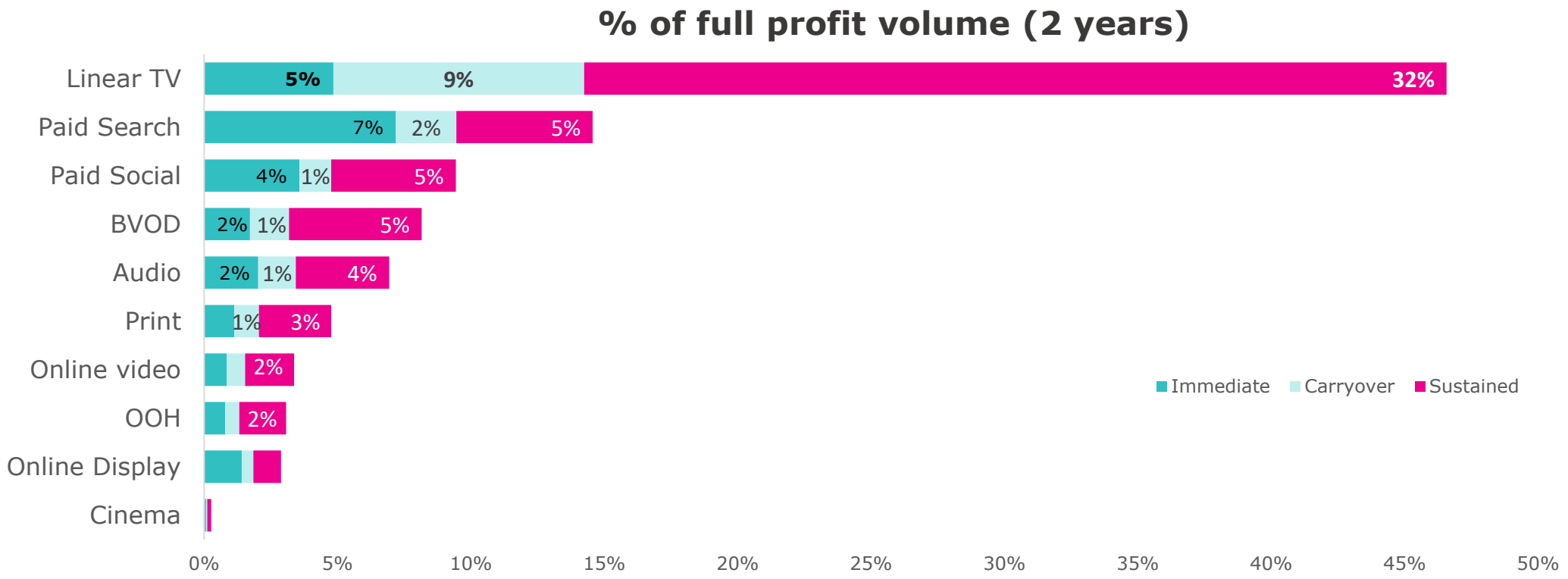
Source: Profit Ability 2, April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.
Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK

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

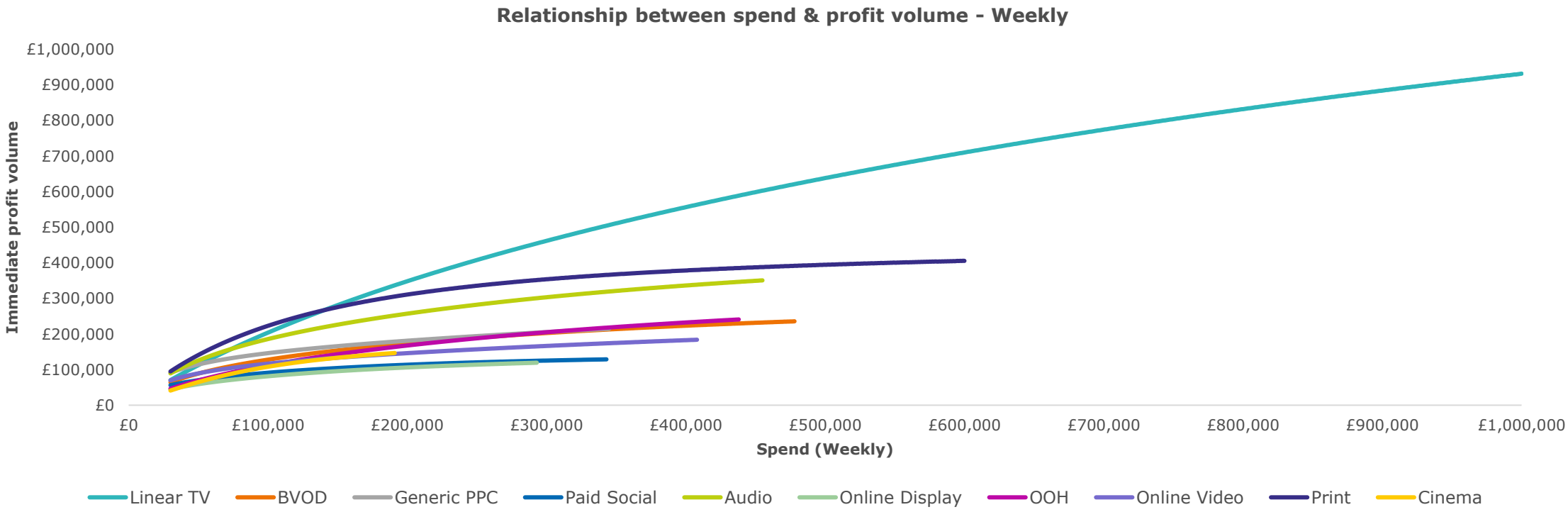
linear TV is unmatched as the total profit volume driver in the long term



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

ENVIRONICS ANALYTICS

Source: Environics Analytics, "Campaign-level Proof that TV Advertising Drives Real Business Outcomes," May 2026.

DOWNLOAD the full study

think tv

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

ENVIRONICS ANALYTICS

Source: Environics Analytics, "Campaign-level Proof that TV Advertising Drives Real Business Outcomes," May 2026.

DOWNLOAD the full study

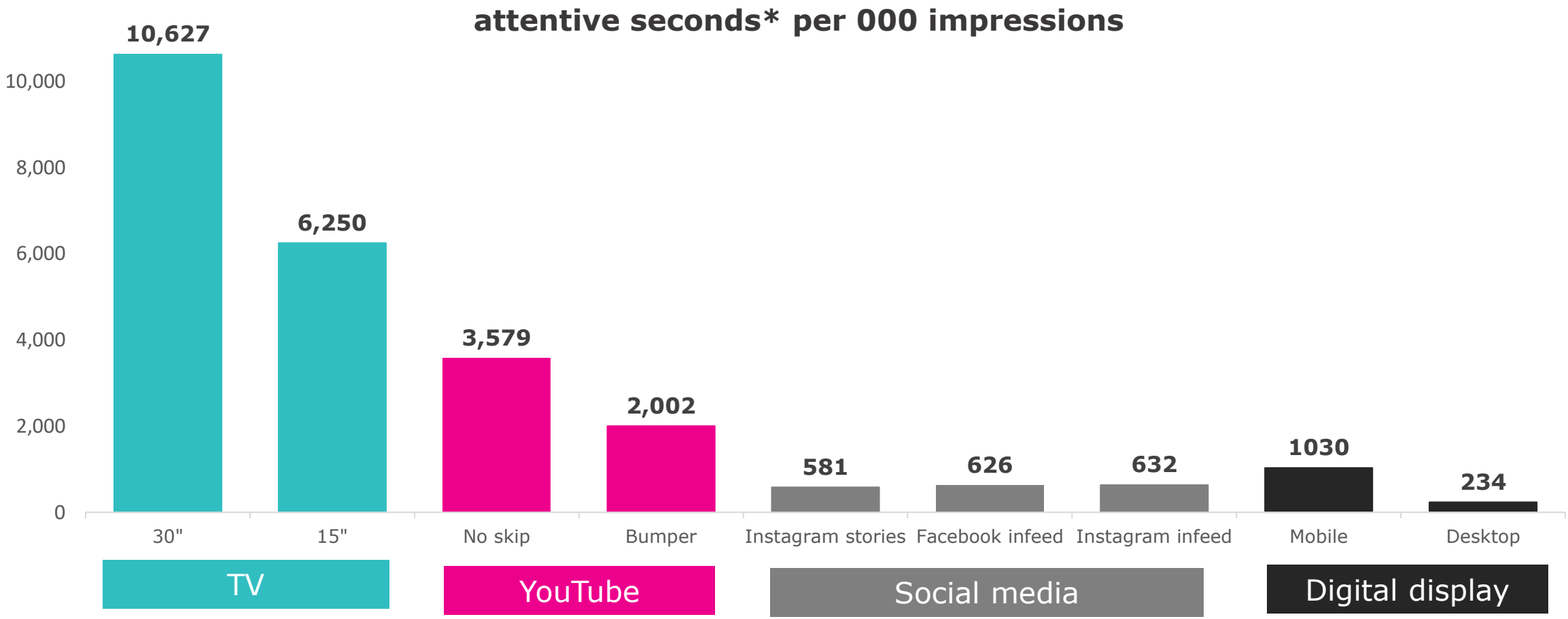
think tv

IMPACT

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



TV ads deliver the most "attentive seconds"

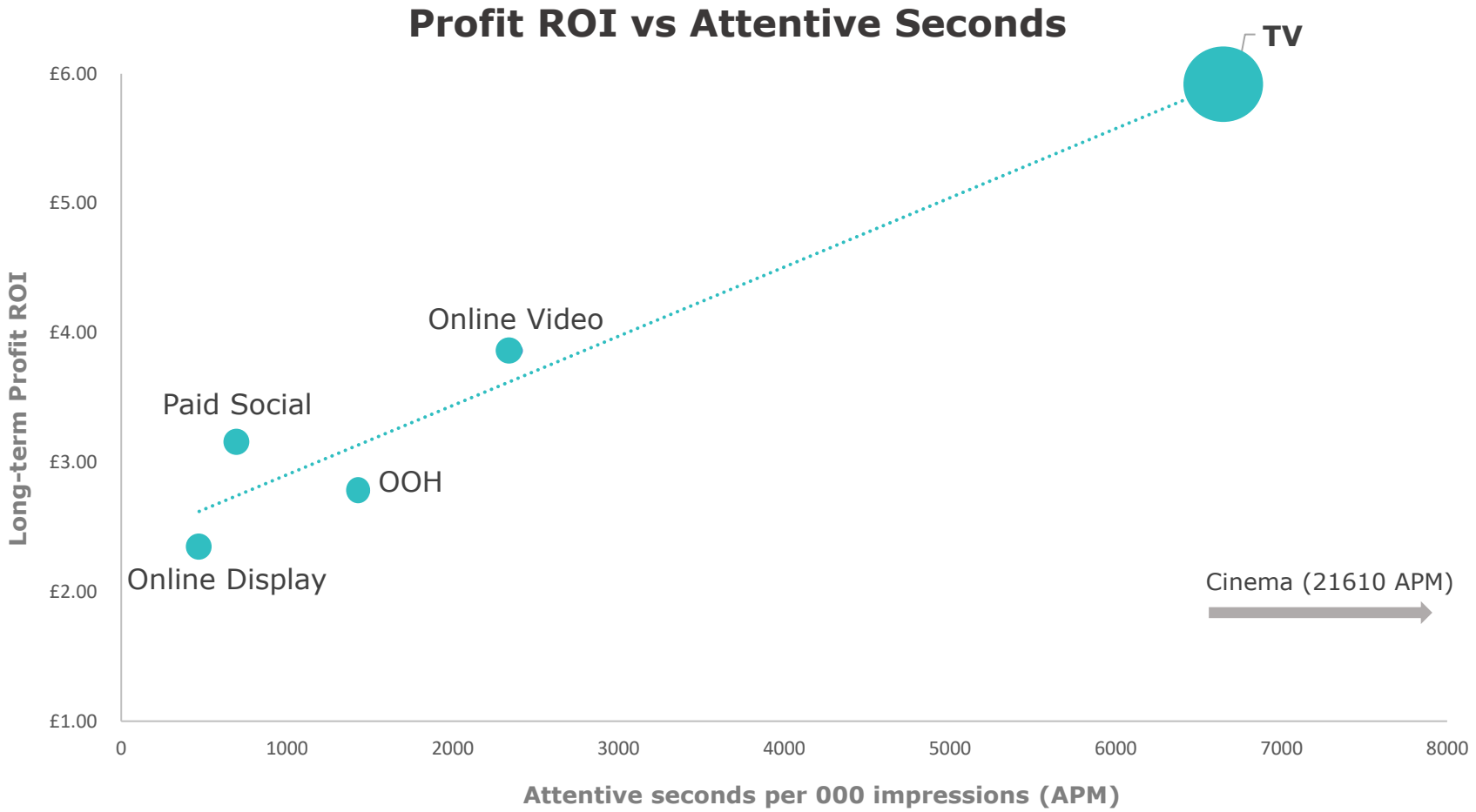


Source: Ebiquity, with Lumen, TVision and Dan White – The Challenge of Attention, 2024
* "attentive seconds" = the actual time an ad is viewed by a person.

TV delivers superior attention

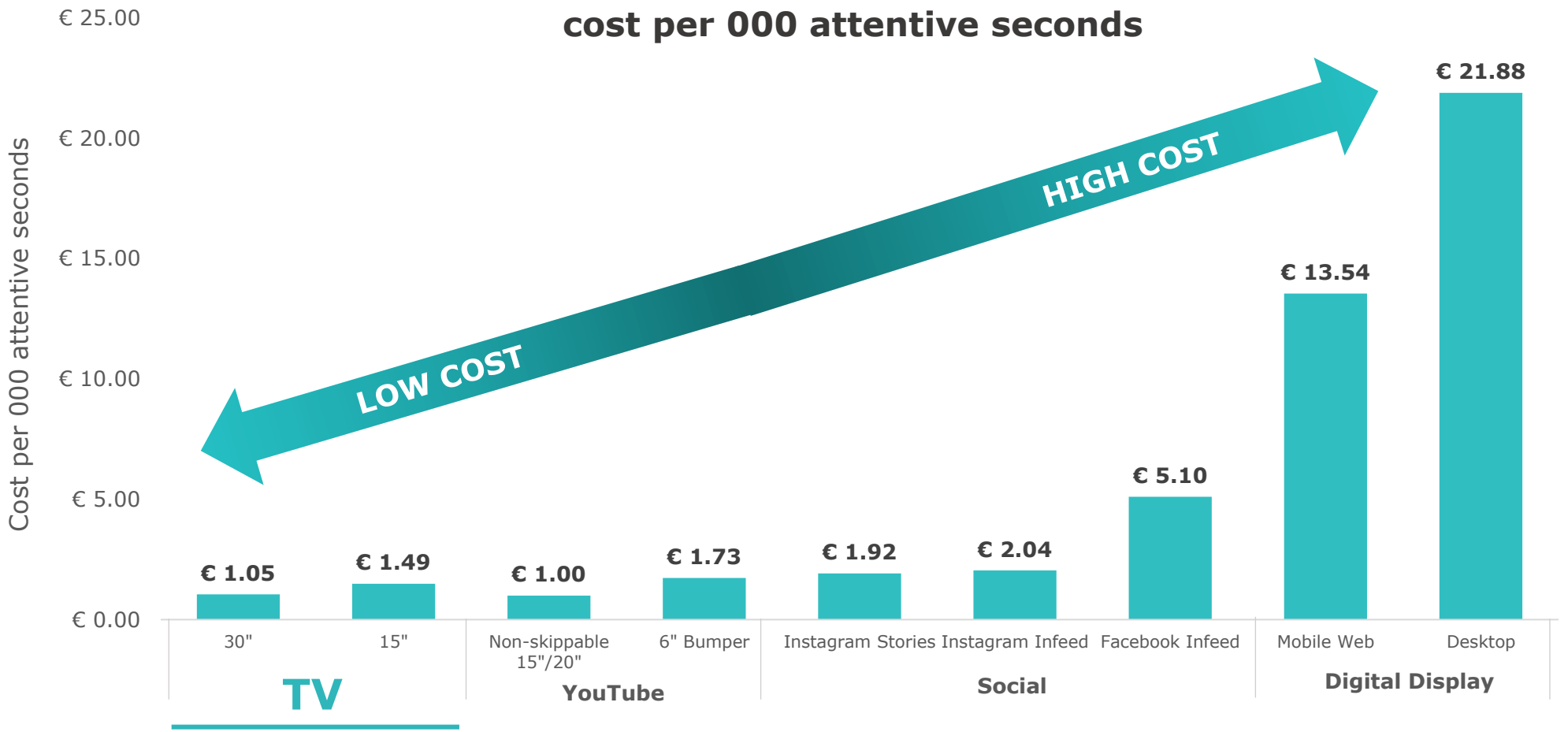
how does this play out in media?

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

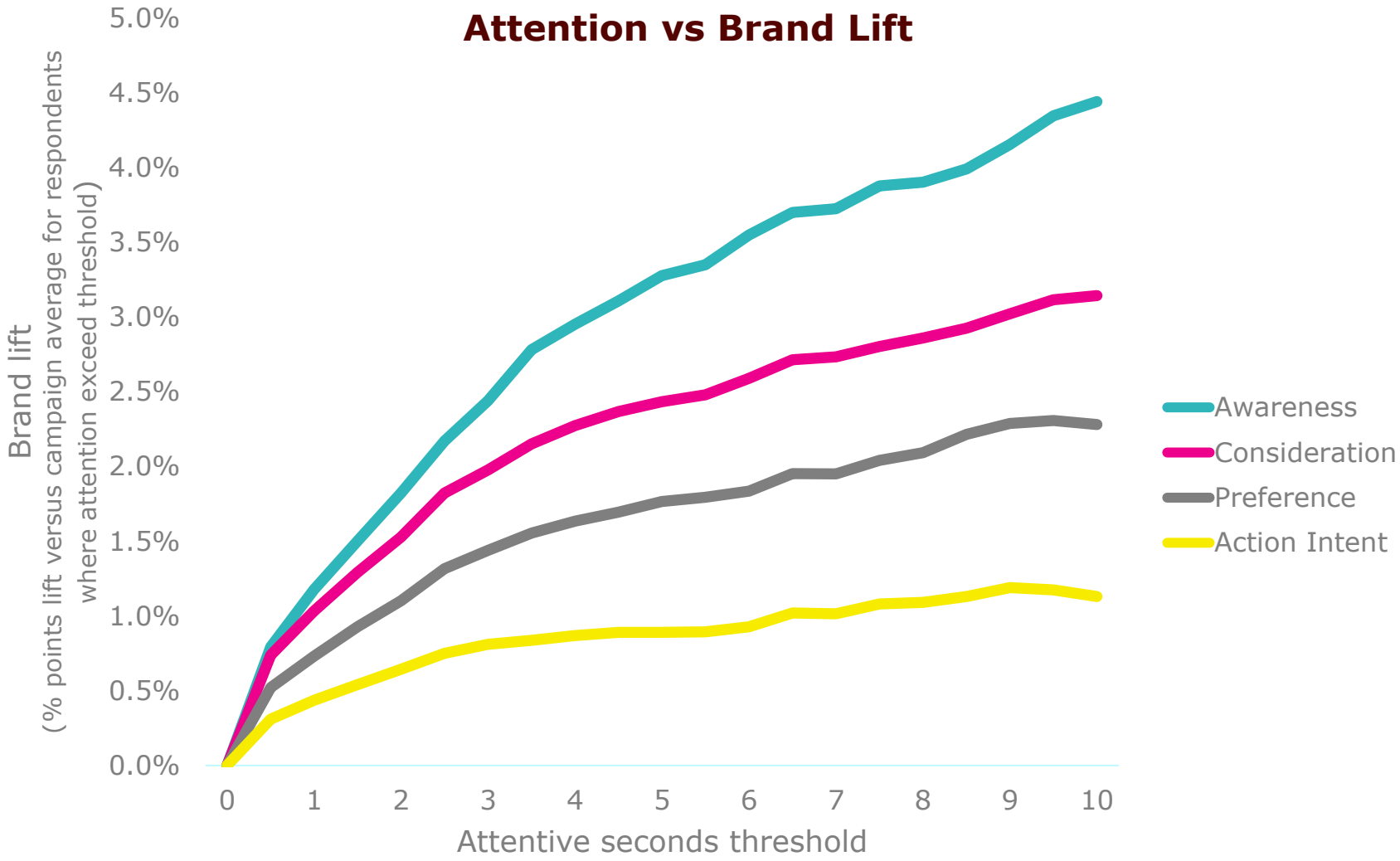


Source: Lumen The True Cost of Advertising Attention

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



Source: Havas, Brand Metrics & Lumen "What do 9,000 Brand Lift Studies Teach Us About Attention & Memory" 2024

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

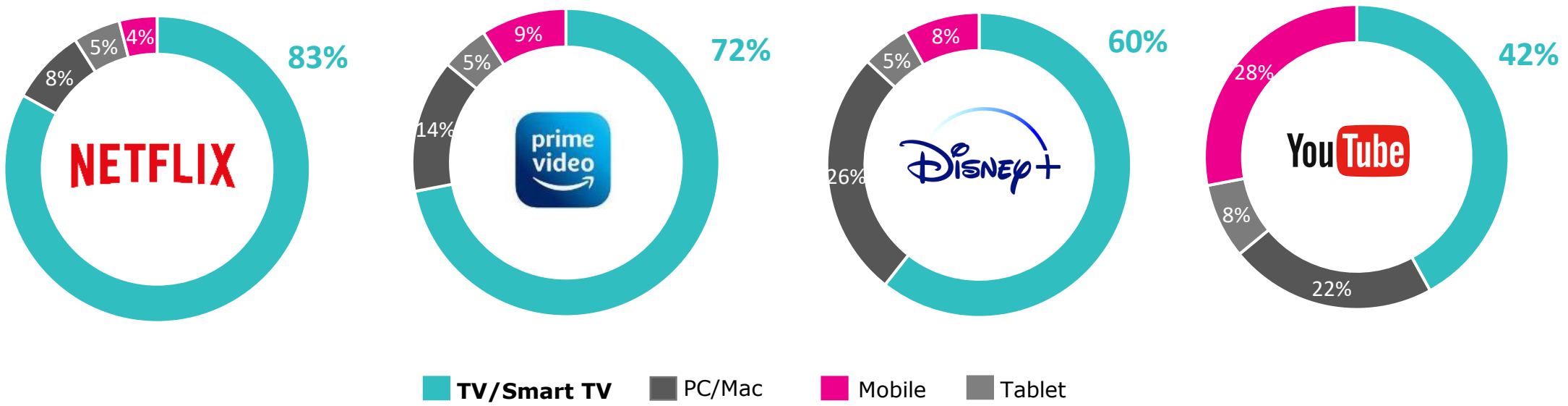
+ 17×

Source: Thinkbox, "Room with the viewers", March 2024 | Ebiquity & Lumen, The Challenge of Attention, 2024

big screen = big attention

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

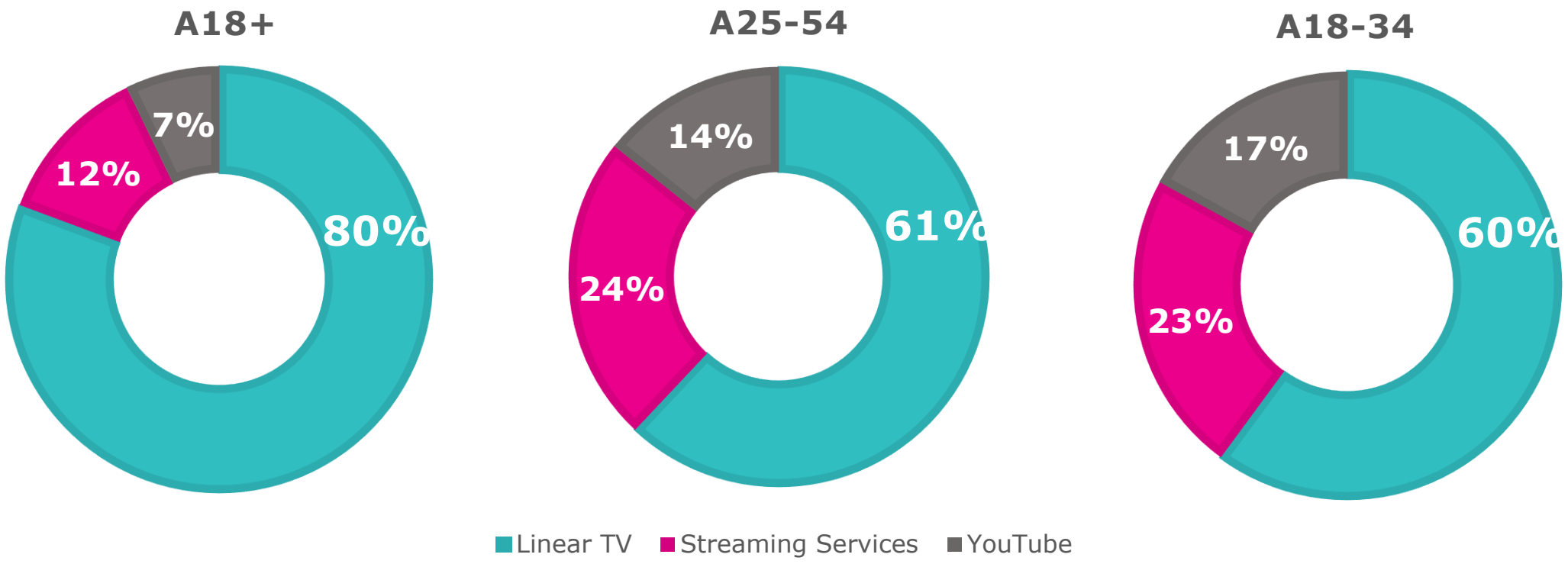
SHARE OF TUNING BY DEVICE



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



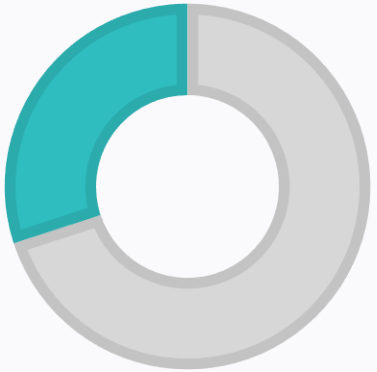
Note: Streaming Services include ad-free and ad-supported services as well as broadcaster streaming services
Source: Numeris VAM , 9/15/2025 to 5/31/2026, Total Canada | Total Time (hours) on a TV / Smart TV device. Excludes Facebook Video, Instagram Reels, TikTok; Streaming Services include broadcaster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

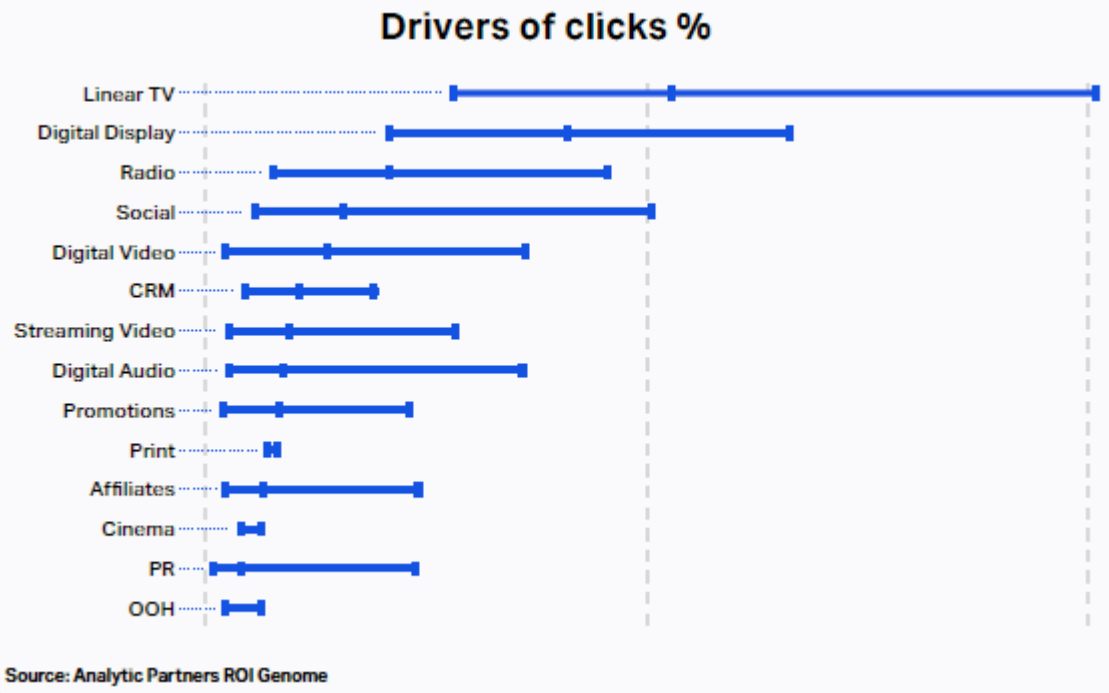
TV makes other channels work harder

- 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





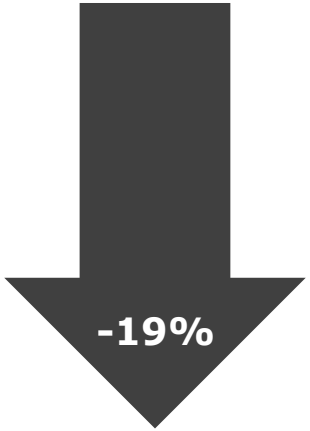
Source: Analytic Partners 2024

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%



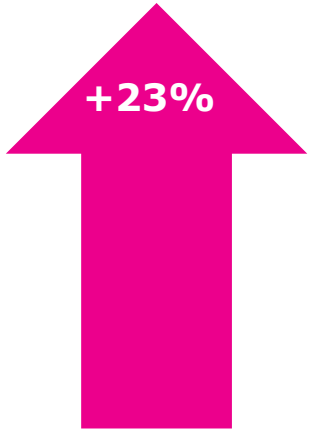
Standalone Digital ROI



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

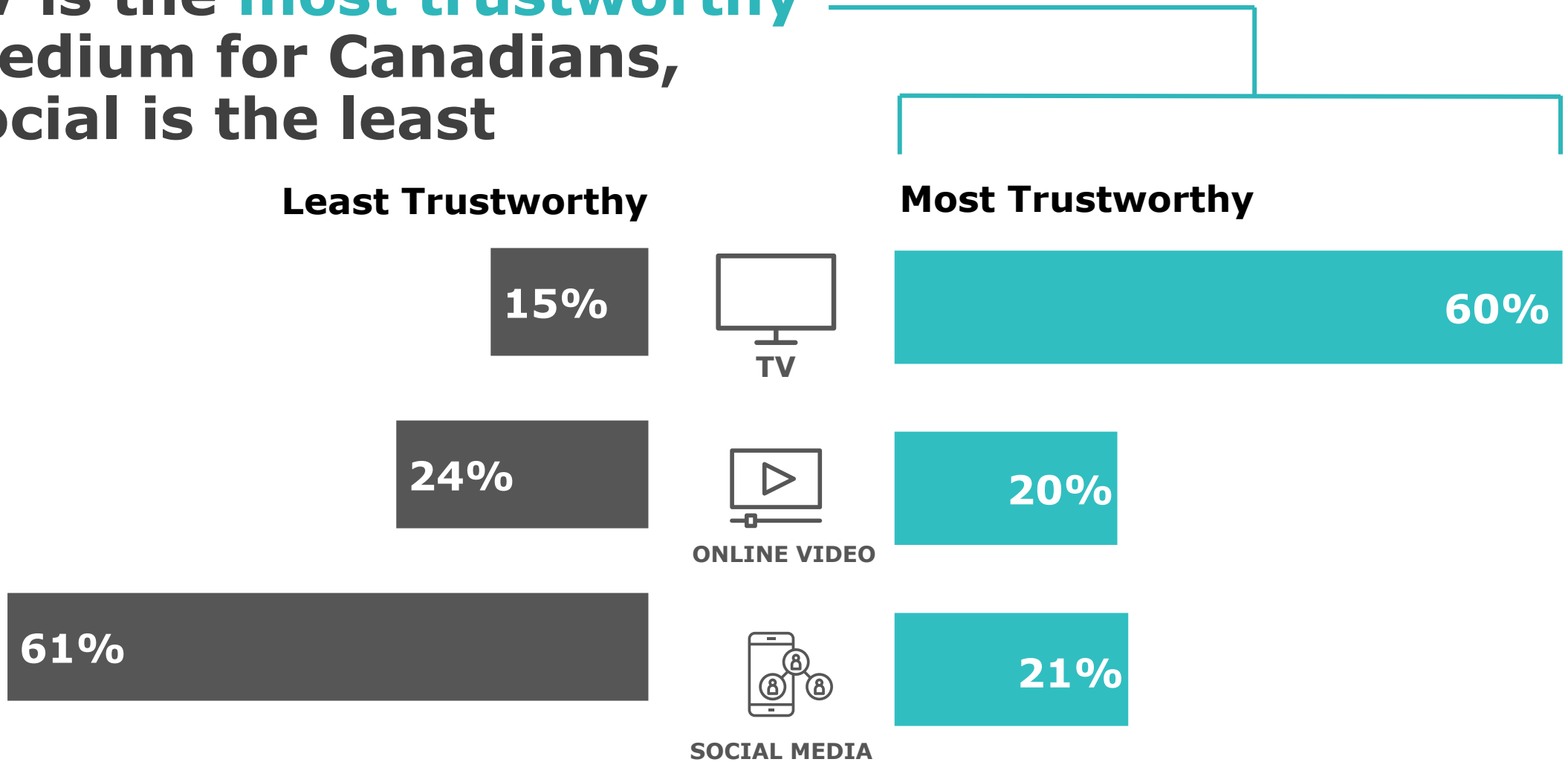


TV's Adjusted ROI



Source: Accenture Canadian Media Attribution Study 2019

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



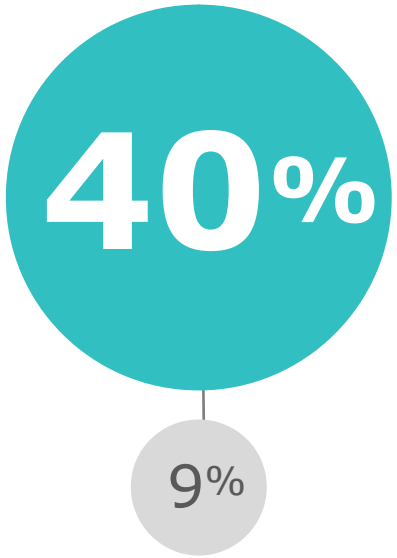
TV

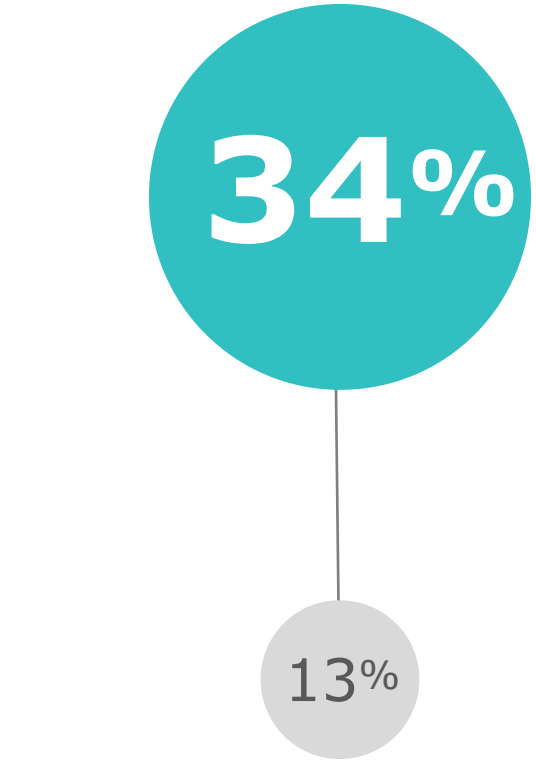


YOUTUBE
(second highest)



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 most likely to generate emotion and make people laugh



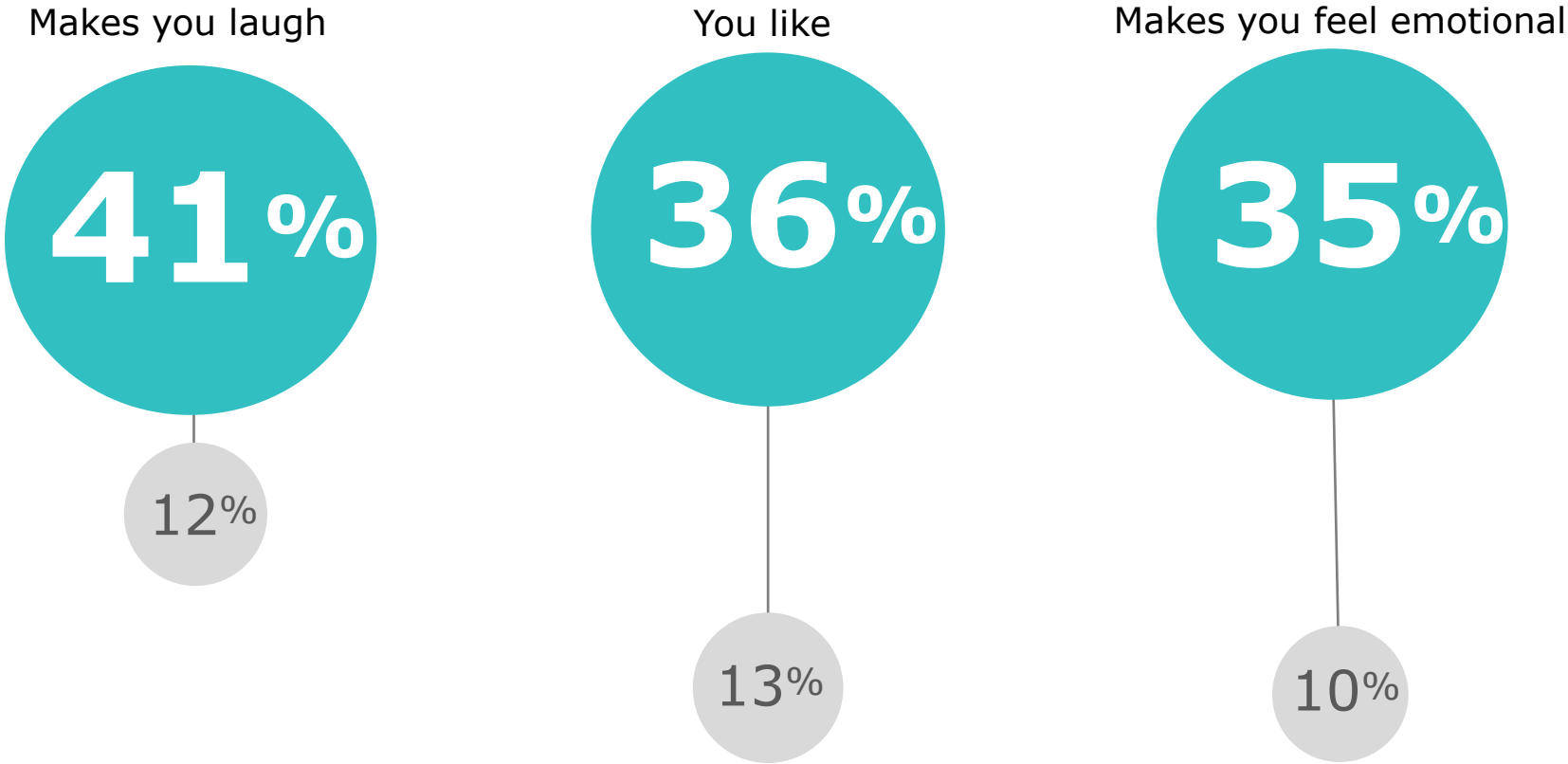
TV



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 works throughout the funnel

Driving action at every stage of the customer journey

Top of the Funnel

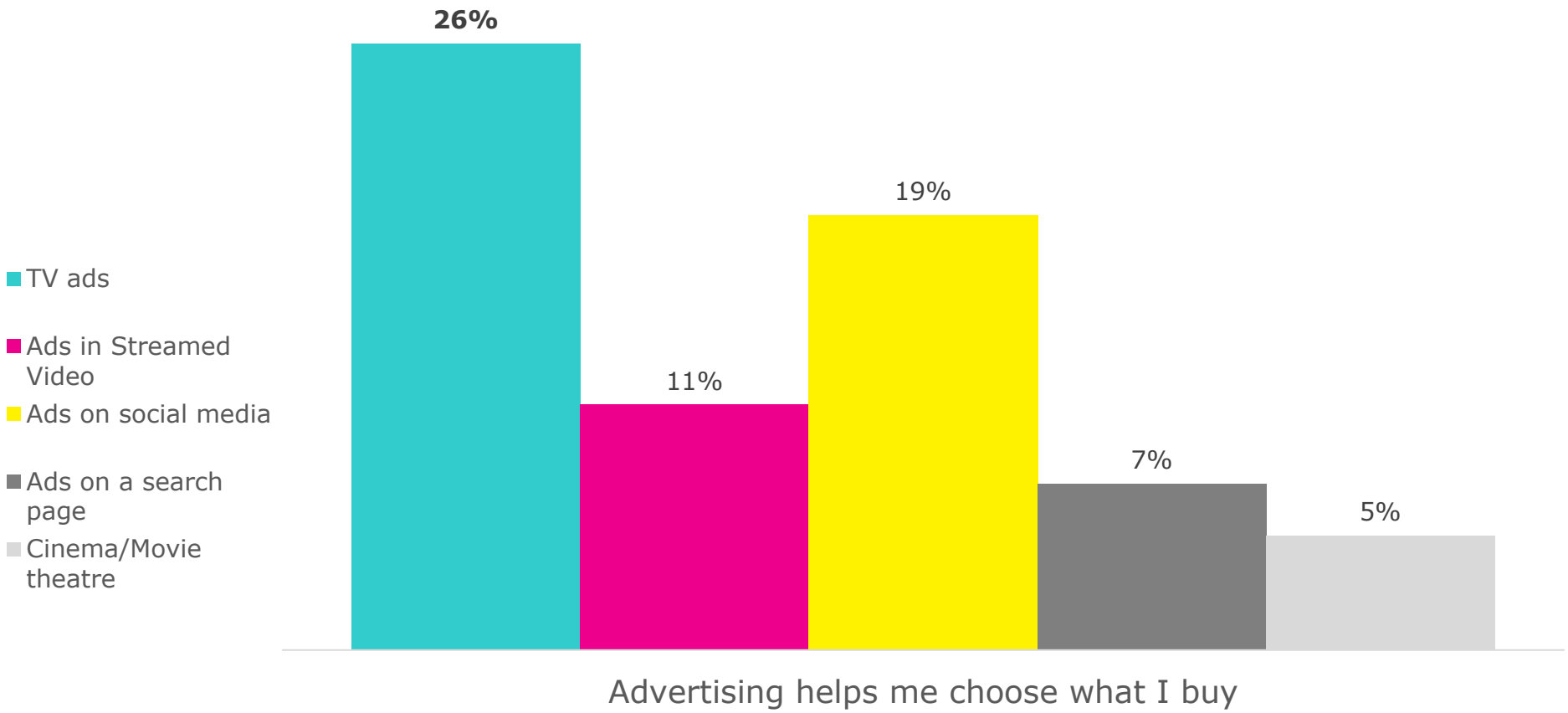
- Awareness
- Brand building
- Interest / purchase intent

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



Source: Vividata SCC | Study of the Canadian Consumer Spring 2026 | Adults 18+

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

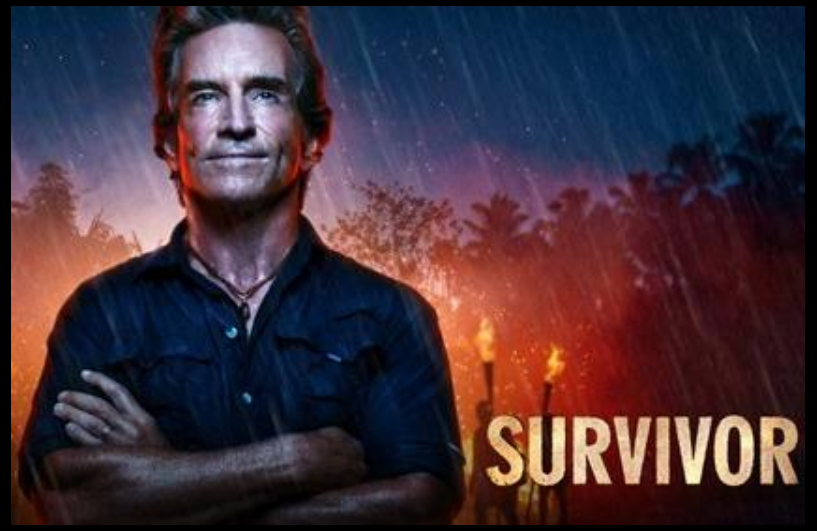
what Canadians are watching



what are Canadians watching?



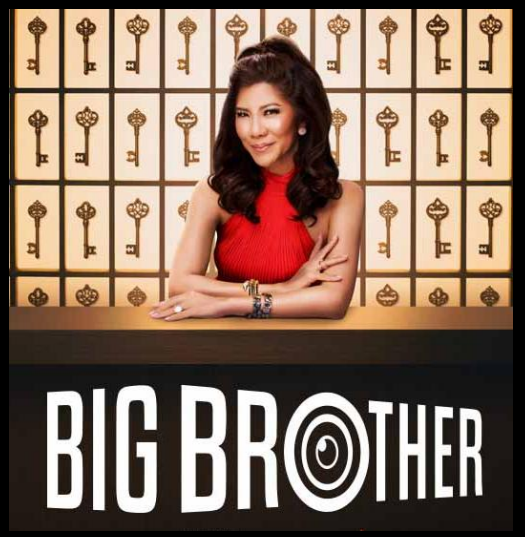














top 10 TV shows (English, ex-sports)

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



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

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**!



Source: Numeris PPM, Total Canada, P2+

in case you missed it

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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.

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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 »



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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.

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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.

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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.

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the power of TV in an attention economy

think tv

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