

the power of TV in an attention economy

think^{tv}

A woman with voluminous curly hair is sitting on a bed, looking thoughtfully to her right while holding a smartphone. She is wearing a white turtleneck sweater under a light blue and white patterned cardigan, and light blue pants. To her left, an acoustic guitar leans against a white brick wall. The background features a window with white curtains and a green plant.

In a fragmented media landscape, TV remains the **fastest path to scale, trust, and growth**

Digital fragmentation has made efficient reach harder and more expensive.

To grow, brands still need:

- Rapid national scale
- High-attention environments
- Trusted contexts that build brand and drive demand

Total TV continues to deliver on all three

Total TV = linear TV + broadcaster streaming services

top 5 reasons to advertise on TV:

- 1. Your consumer is watching TV:** 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



SCALE

TV delivers unmatched reach and time spent





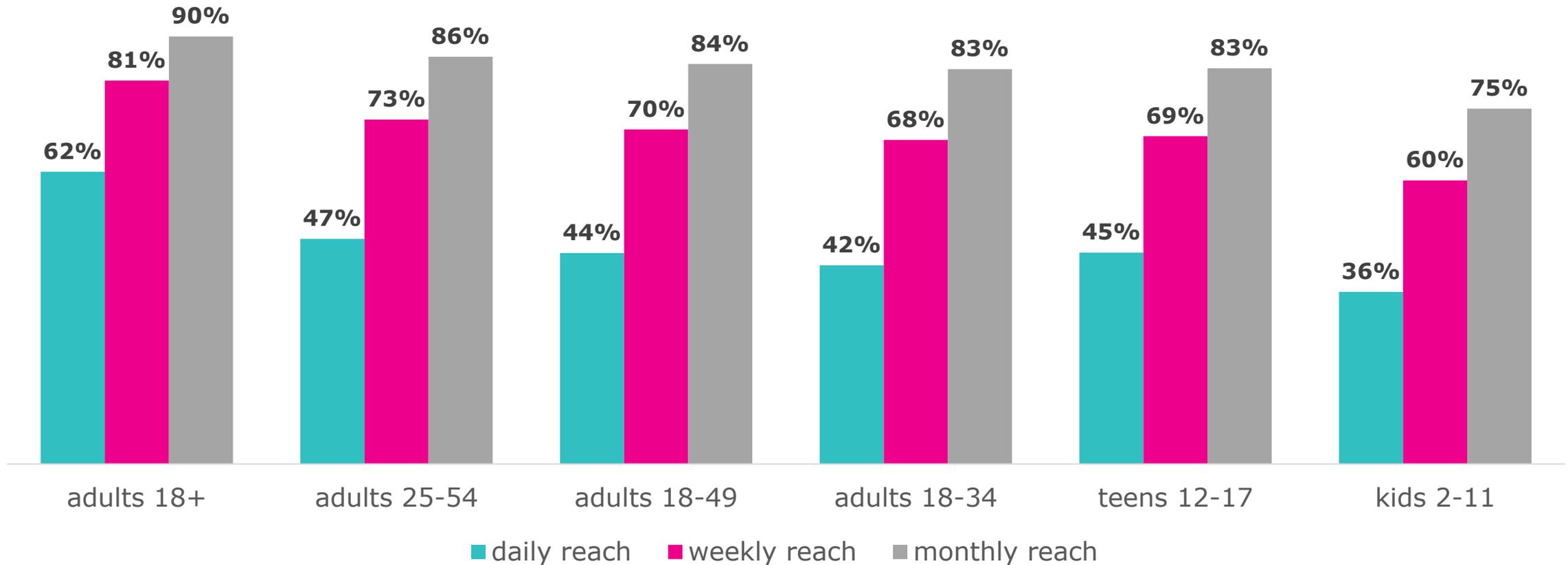
“ Marketing activities only build mental availability in the audience they reach.

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

Byron Sharp

Professor of Marketing Science,
University of South Australia

Linear TV reaches **90%** of Canadians monthly

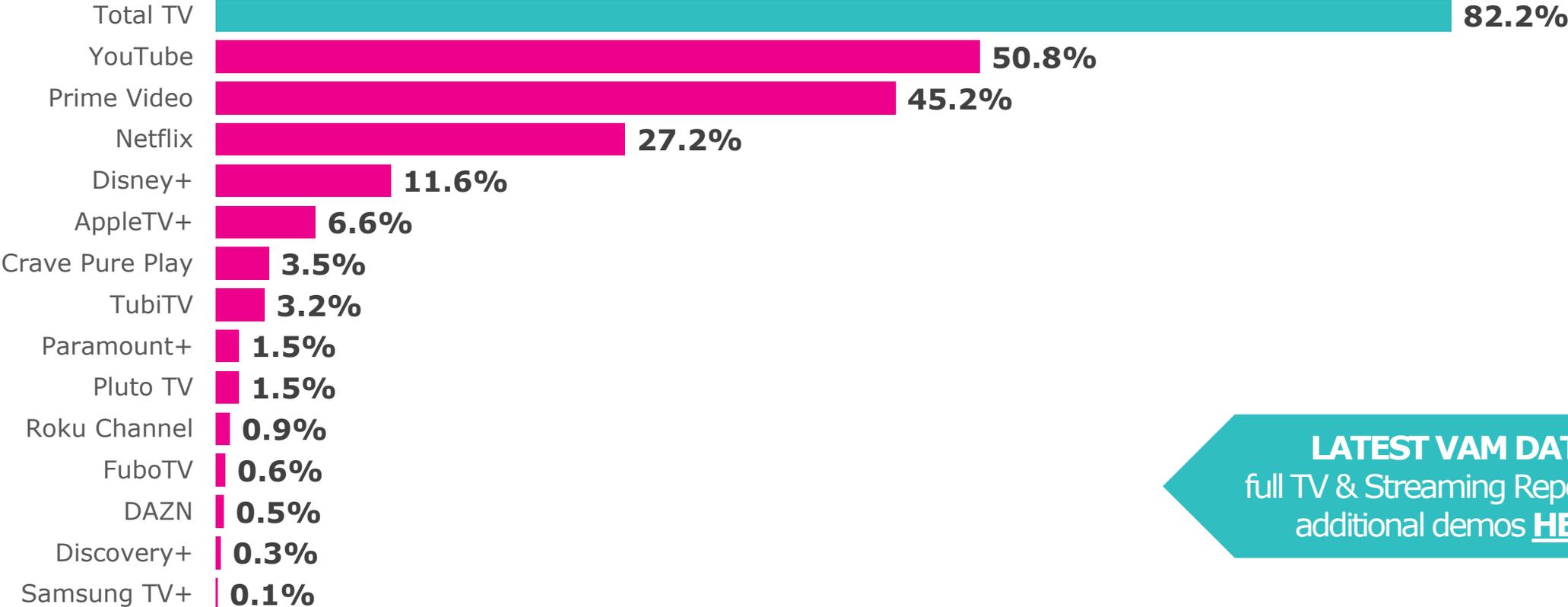


Source: Numeris PPM, Total Canada, 09/15/25 to 12/21/2025

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

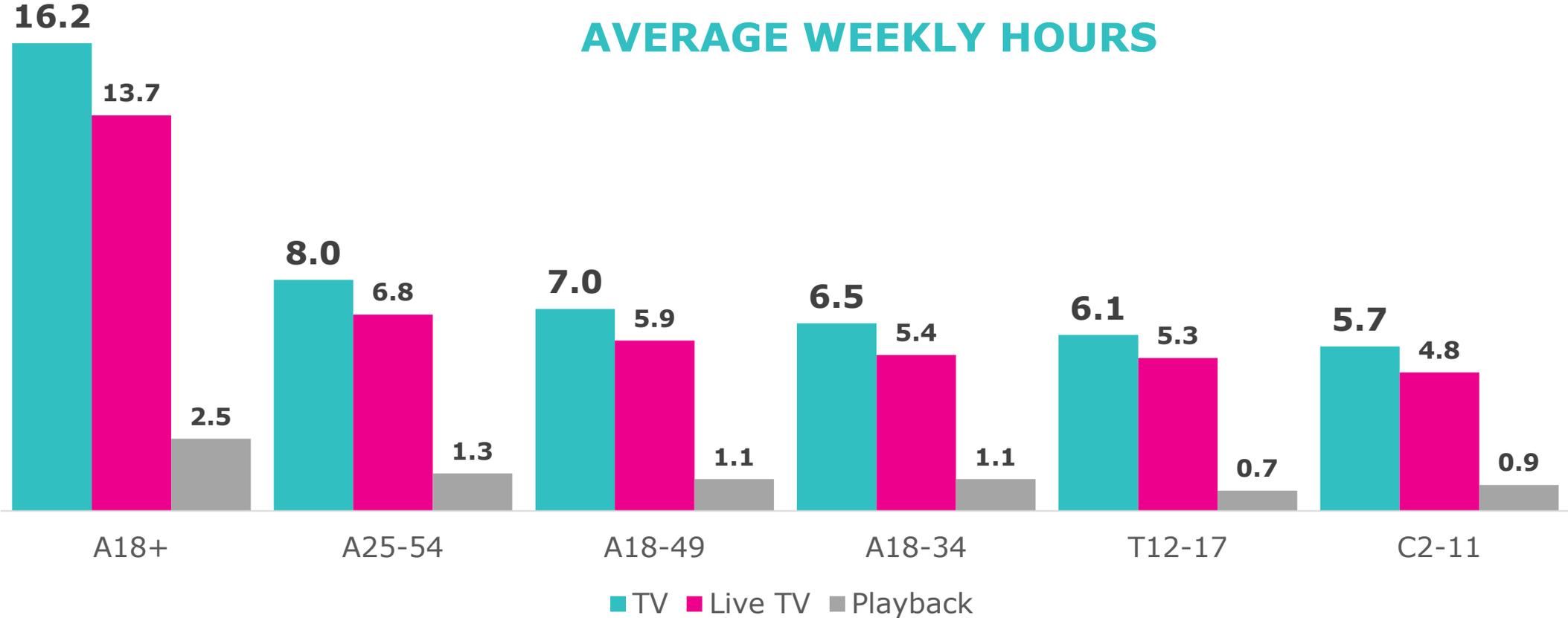
AVERAGE WEEKLY REACH % ADULTS 18+



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

Source: Numeris VAM 09/15/25 to 12/21/2025, Total Canada
Total TV defined as linear TV and broadcaster streaming services | Streaming Services are ad-free and ad-supported services (in-home viewing only)

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



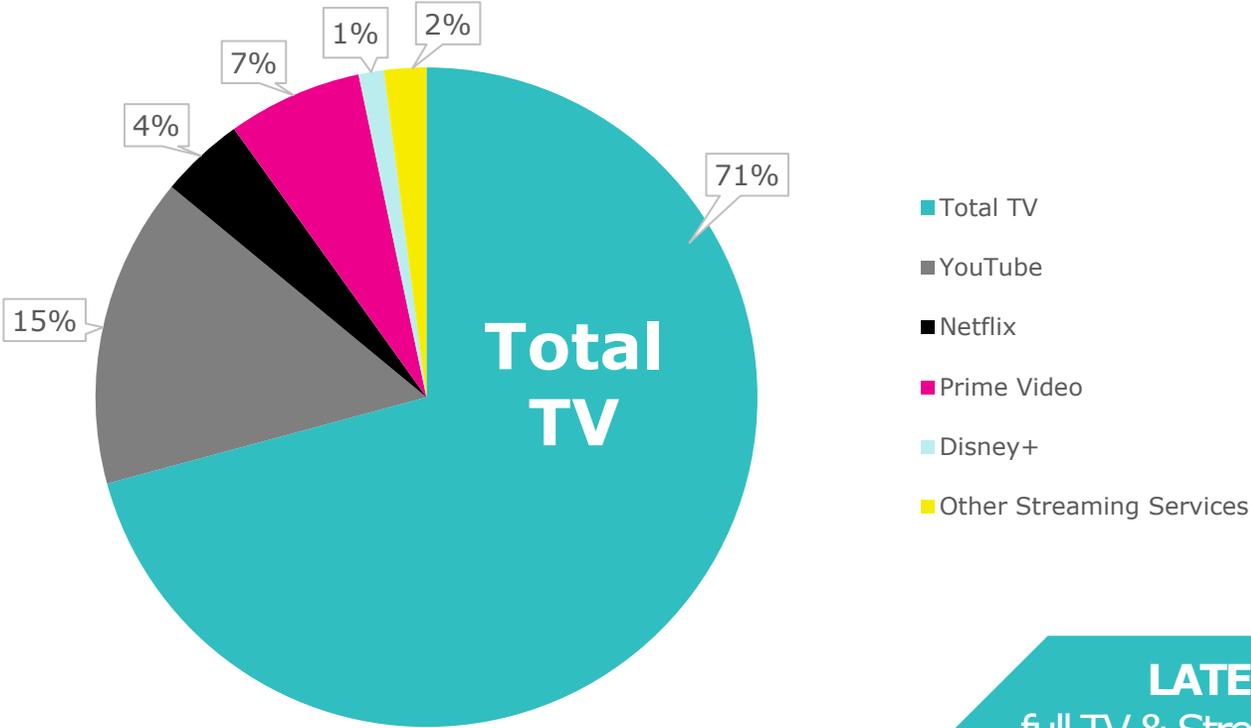
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Linear TV = viewing to any live broadcaster content (streamed on any platform and linear TV) plus any broadcaster content recorded on PVR (with commercial load intact) that is viewed within 7 days of initial broadcast. Does not include on demand streaming.

Playback = non live viewing 0-7 days post airing

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

SHARE OF VIDEO ADULTS 18+



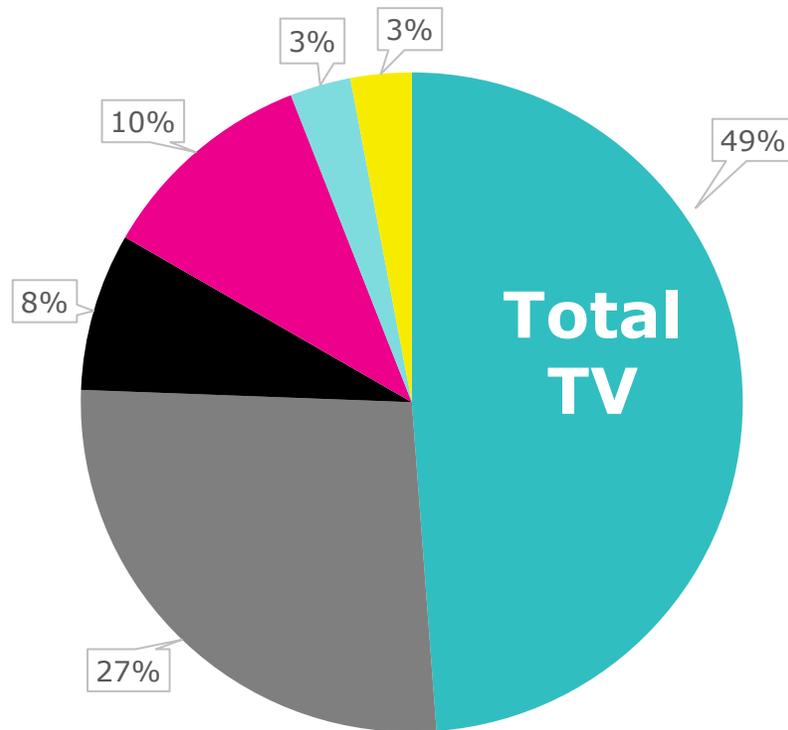
LATEST VAM DATA
full TV & Streaming Report Available
[HERE](#)

Source: Numeris VAM 09/15/25 to 12/21/2025, Total Canada, 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

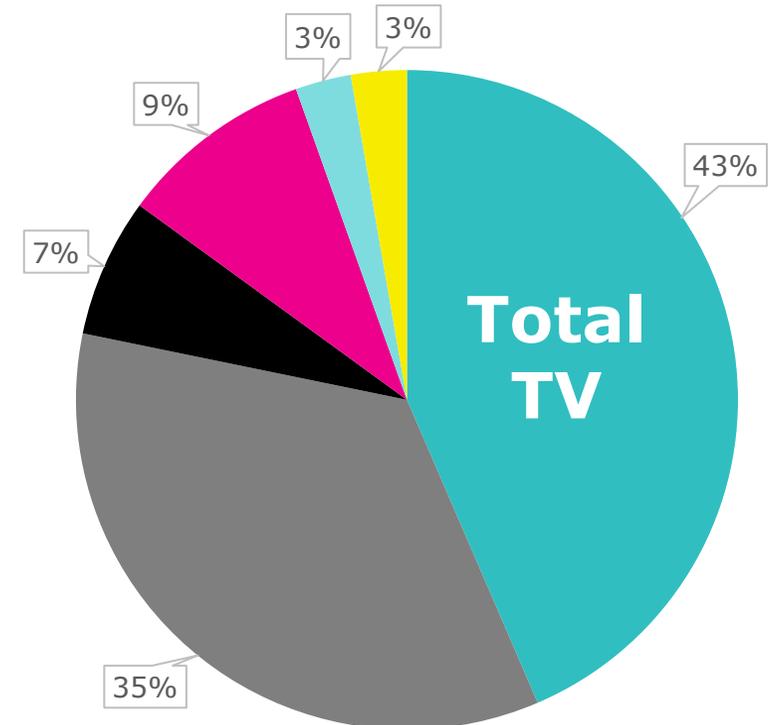
...across **key** demos

SHARE OF VIDEO

ADULTS 25-54



ADULTS 18-34



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

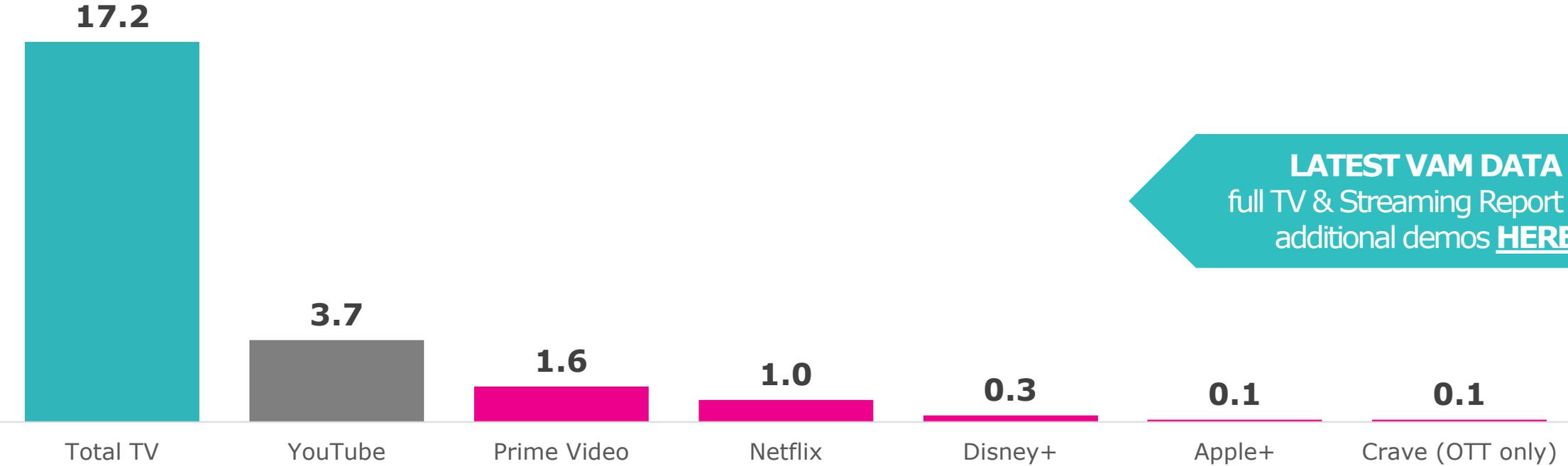
Source: Numeris VAM 09/15/25 to 12/21/2025, Total Canada, all time spent per capita

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Total TV dominates time spent

AVERAGE WEEKLY HOURS ADULTS 18+



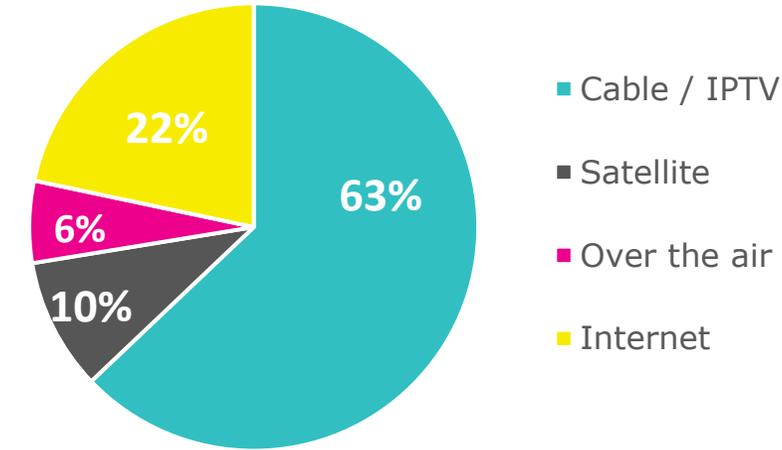
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Source: Numeris VAM 09/15/25 to 12/21/2025 | Total Canada | all time spent per capita
Total TV defined as linear TV and broadcaster streaming services | Streaming Services are ad-free and ad-supported services (in-home viewing only)

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 3.6% year-over-year, anyone with an internet connection has access to linear TV content

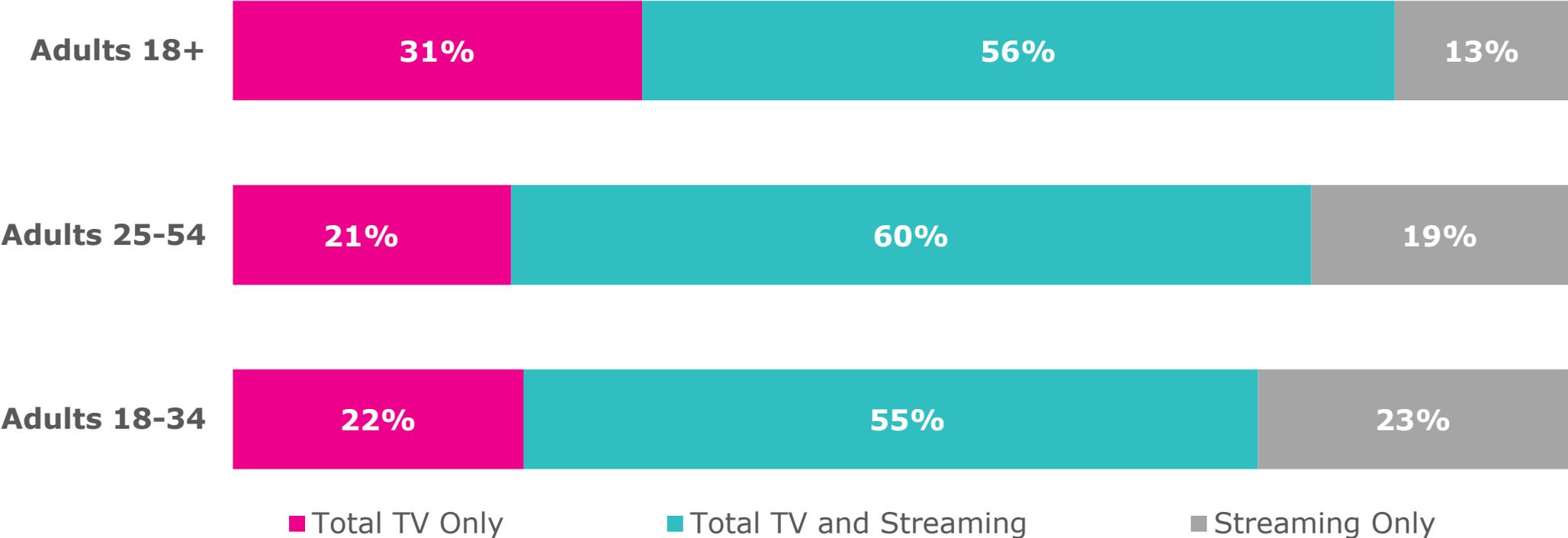
	Sep '24	Sep '25	Index (YOY)
TOTAL PAID SUBS	9,555,924	9,214,736	(3.6%)
Basic/Digital Cable	4,467,831	4,315,548	(3.4%)
Satellite	1,246,727	1,028,117	(17.5%)
Telco/IPTV (Internet Protocol TV)	3,818,491	3,859,578	+1.1%
Other	22,875	22,799	(0.3%)

Source: Numeris Universe Estimates: * Sept 2025 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 09/15/25 to 12/21/2025, 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

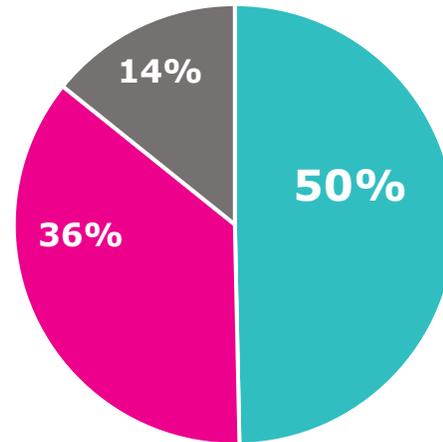
US data is *not* a good proxy for Canada

streaming in the US is much higher than in Canada, where our media habits more closely mirror those in the UK

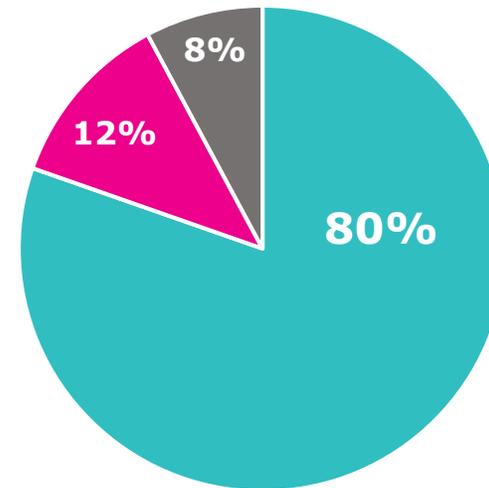
The Canadian advantage: because Canadians stream less (20% vs. 50% in the US), TV remains a far more efficient vehicle for mass reach in Canada than it is south of the border

SHARE OF VIEWING ON A TV SET

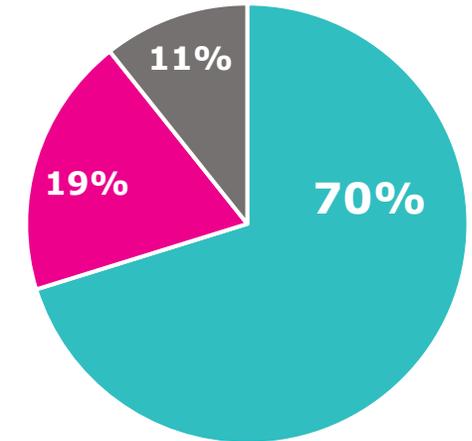
USA



CANADA



UK



■ Broadcast/Cable ■ Streaming ■ YouTube ■ Linear TV ■ Streaming ■ YouTube ■ Linear TV ■ Streaming ■ YouTube

US source: Nielsen Gauge, October 2025, P2+, viewing on a TV set (ex "other" viewing; proportionally adjusted)

Canada source: Numeris VAM, Total Canada, October 2025, P2+, viewing on a TV set

UK source: BARB, October 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)



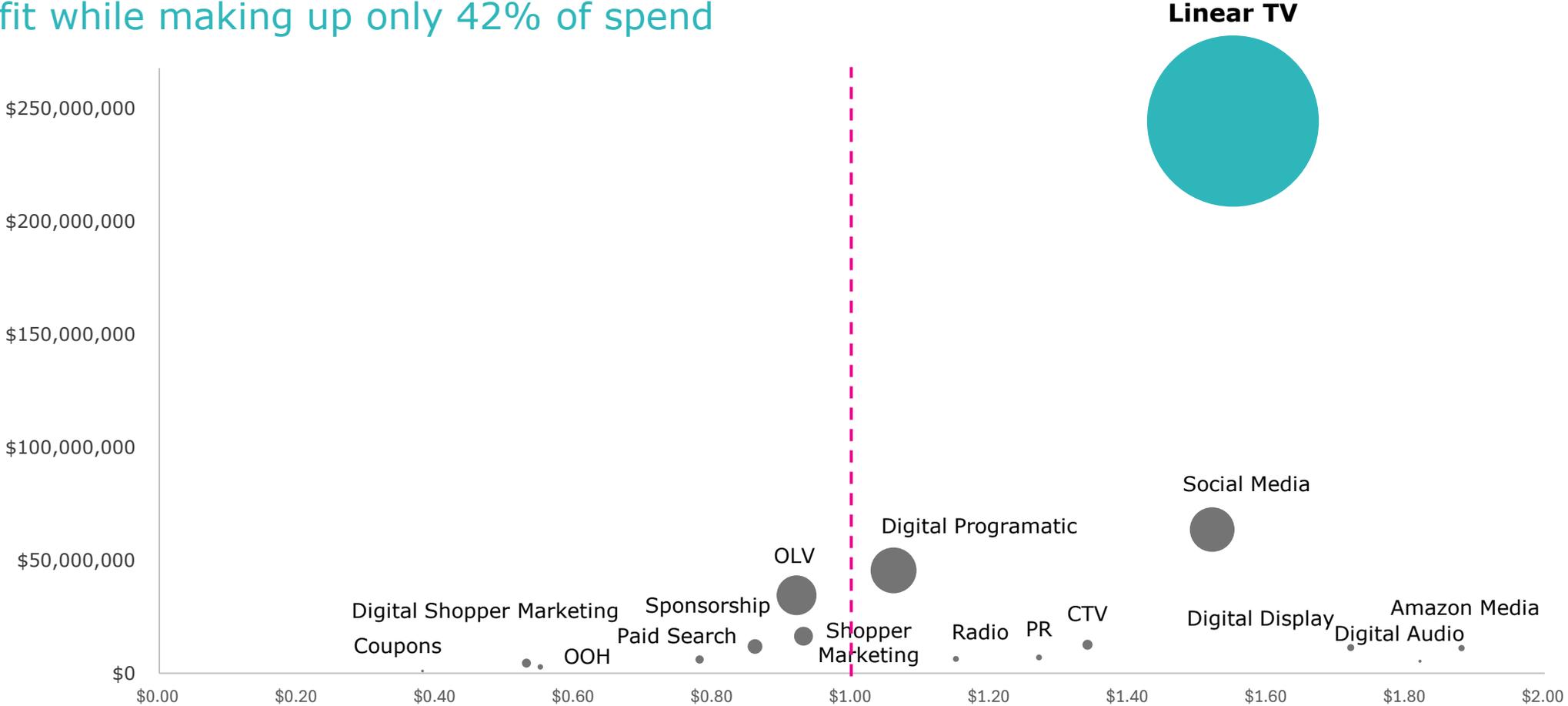
PROFIT

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

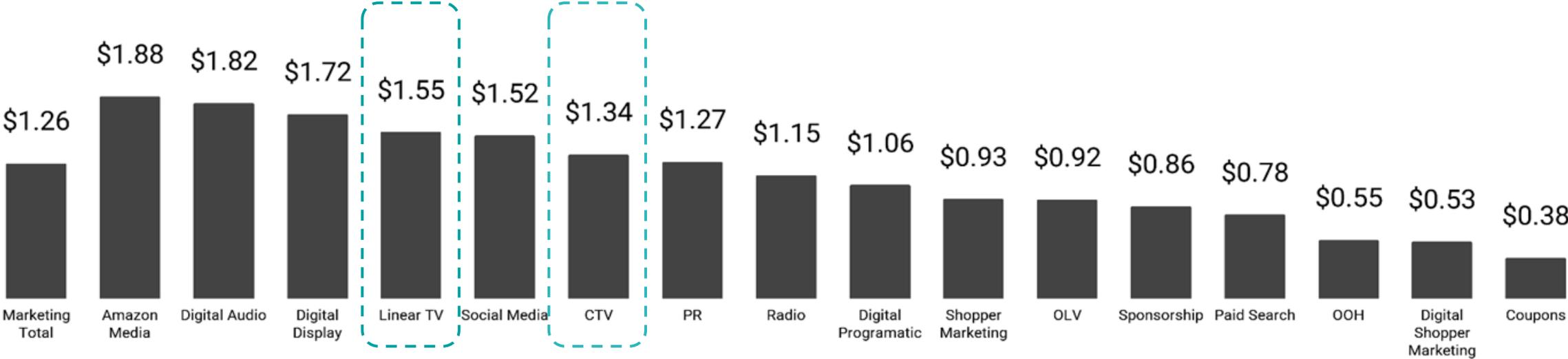
TV delivers 50% of measured short-term profit while making up only 42% of spend



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



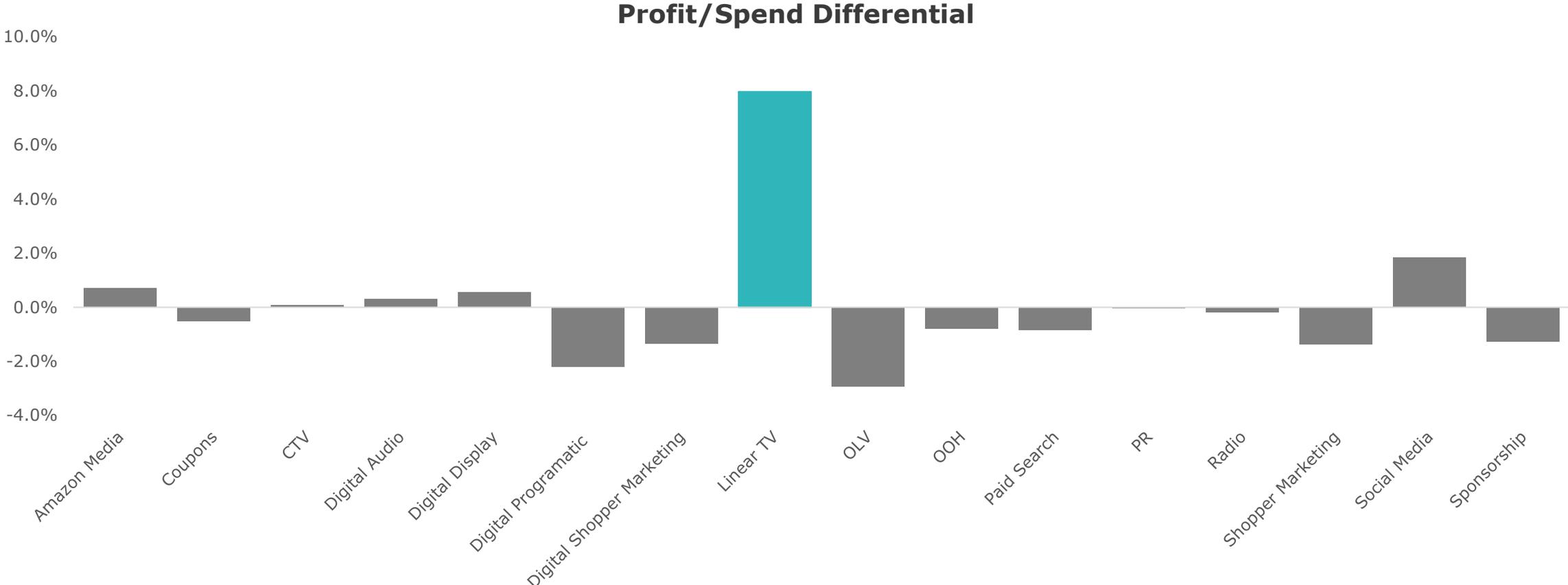
TV delivers impressive short term ROI



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



TV over-indexes on profit vs spend

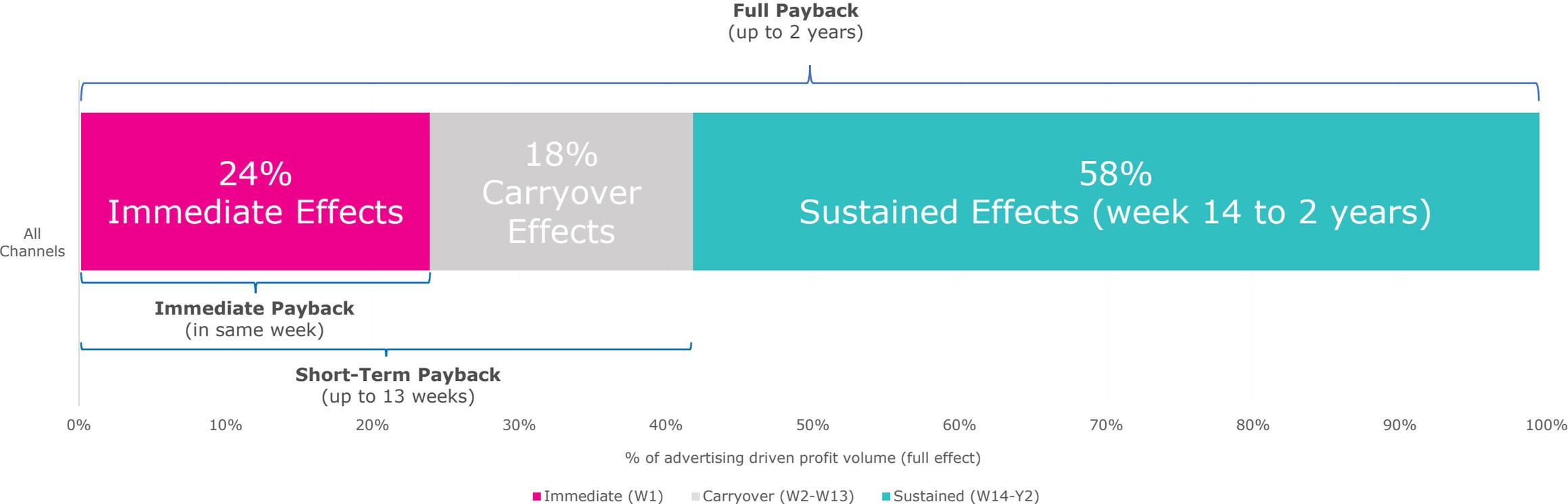


Source: Miix Analytics analysis, September 2025 | \$45b in revenue and \$621m is media spend analyzed, Canadian data
 Profit spend differential = % of channel profit generation - % of channel spend



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

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

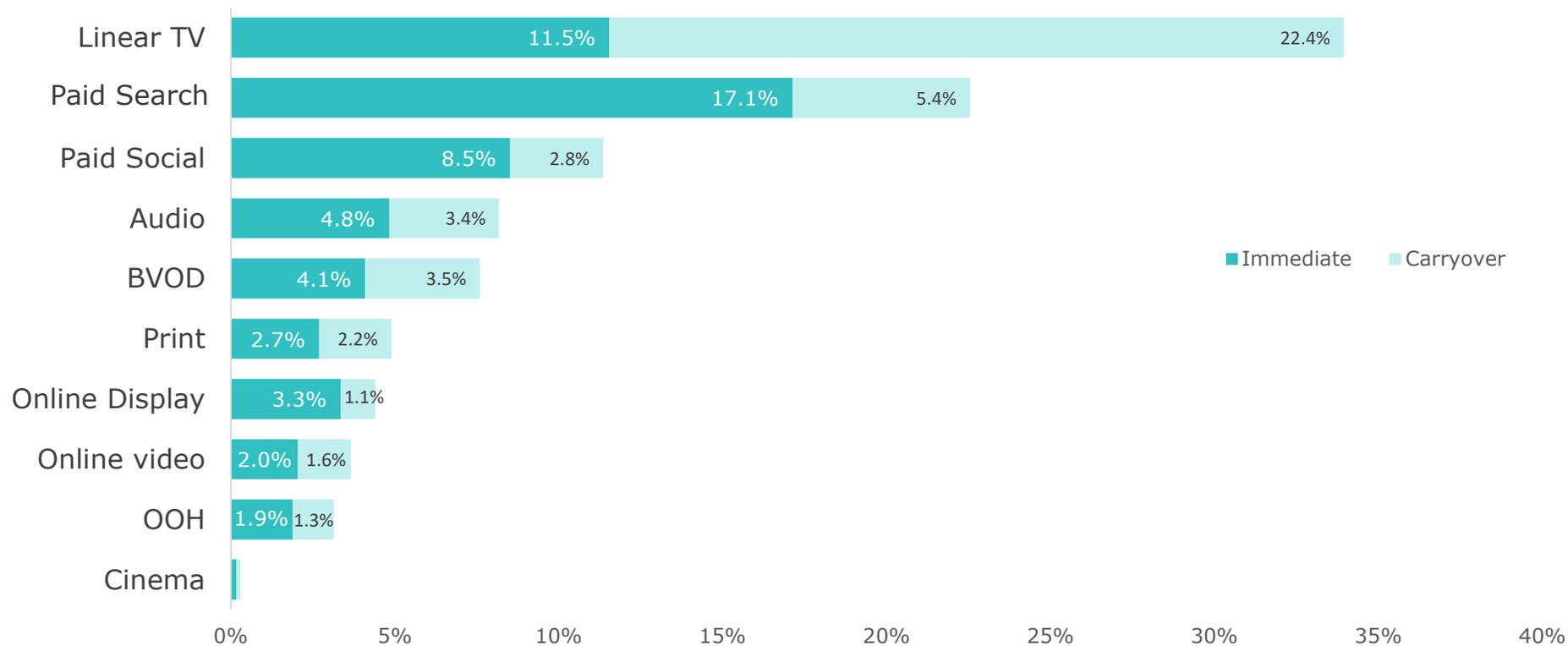


Source: Profit Ability 2, April 2024 – Short term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK. Long Term Multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK



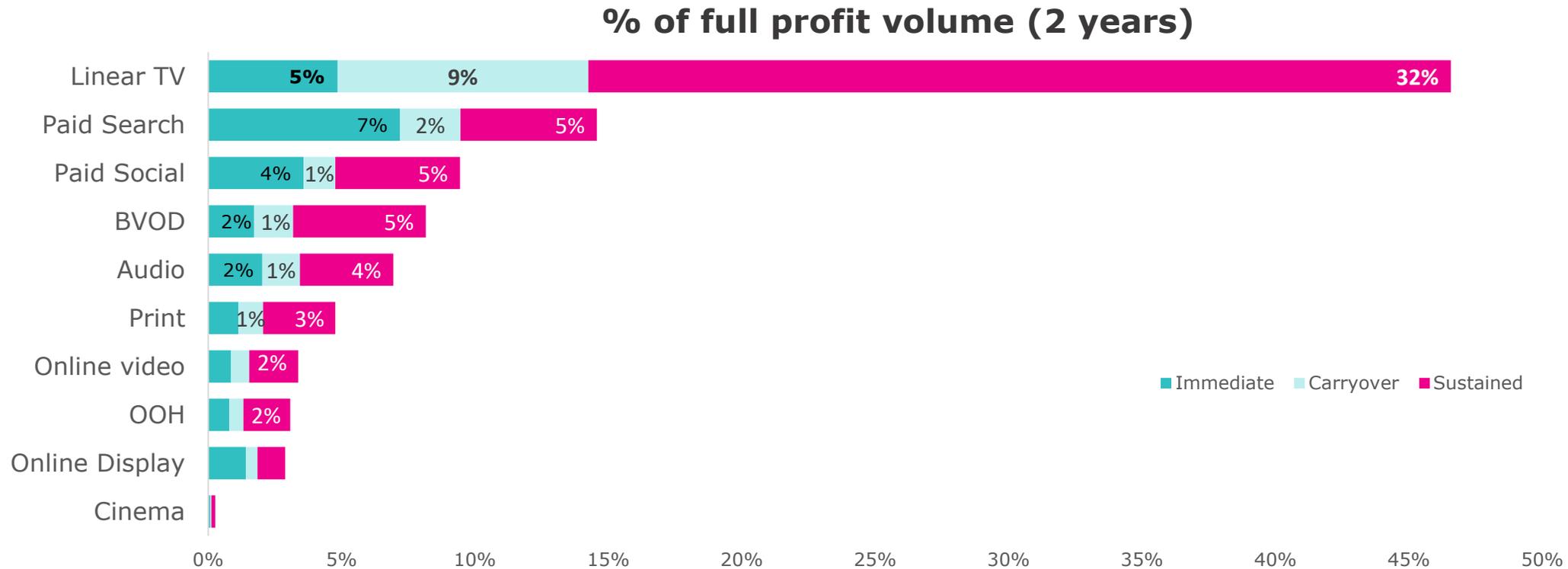
TV is a strong **profit driver** in the short term but jumps to the **lead** when you include carryover effects

% of profit volume | immediate + carryover effect (3 mon)



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

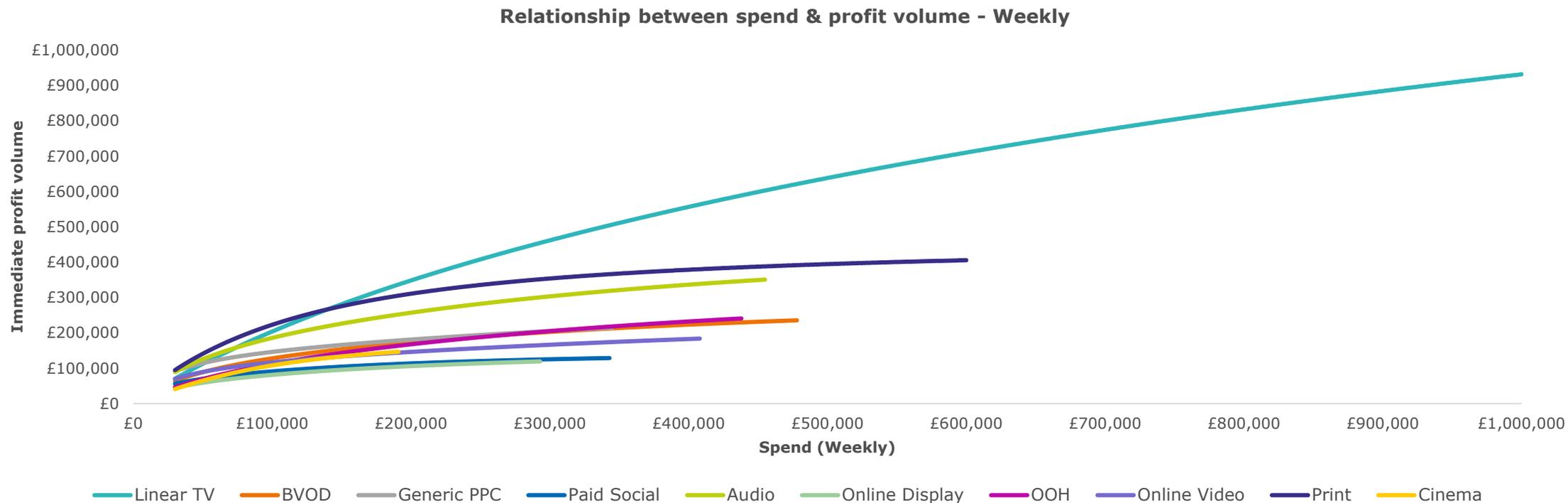
linear TV is unmatched as the total profit ROI volume driver in the long term



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 has scale

the diminishing returns profile and scalability vary by channel



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



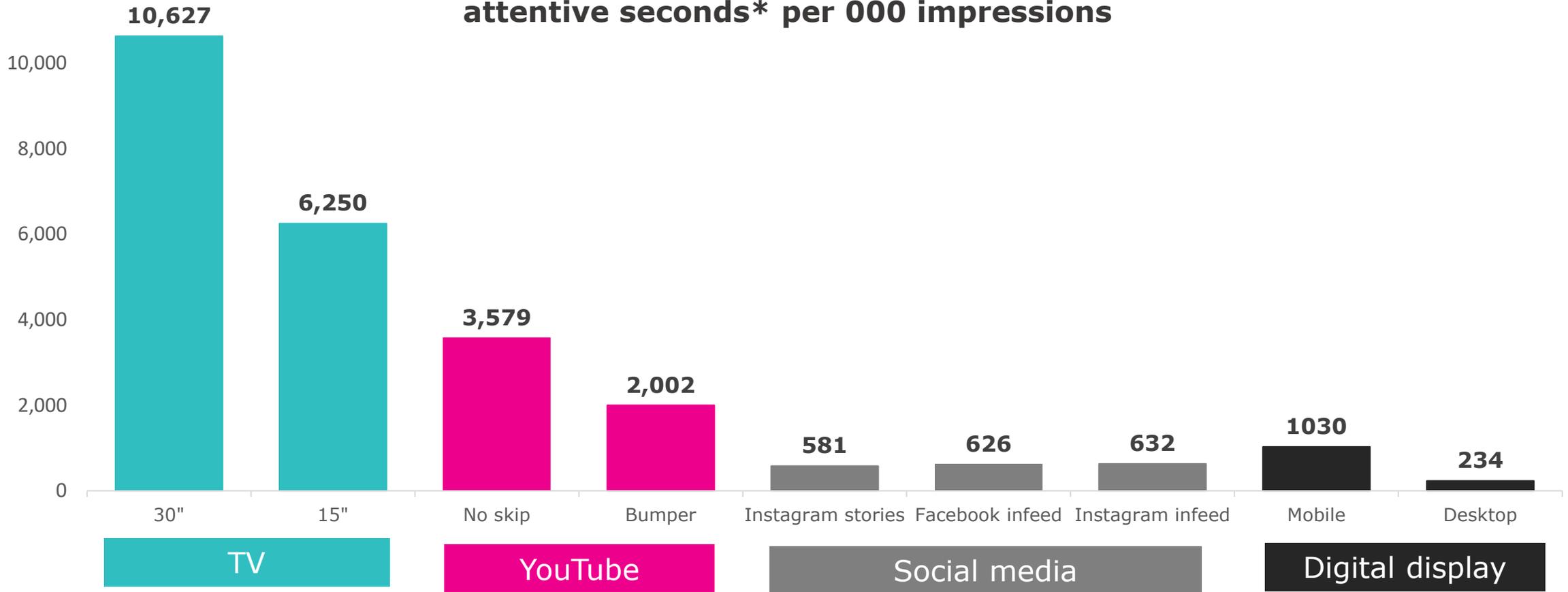
➔ IMPACT

TV's profit power comes from its:

- **superior attention**
- **multiplier effect**
- **trusted environment & memorable ads**
- **full funnel impact**

TV ads deliver the most “attentive seconds”

measuring awareness through attention
attentive seconds* per 000 impressions



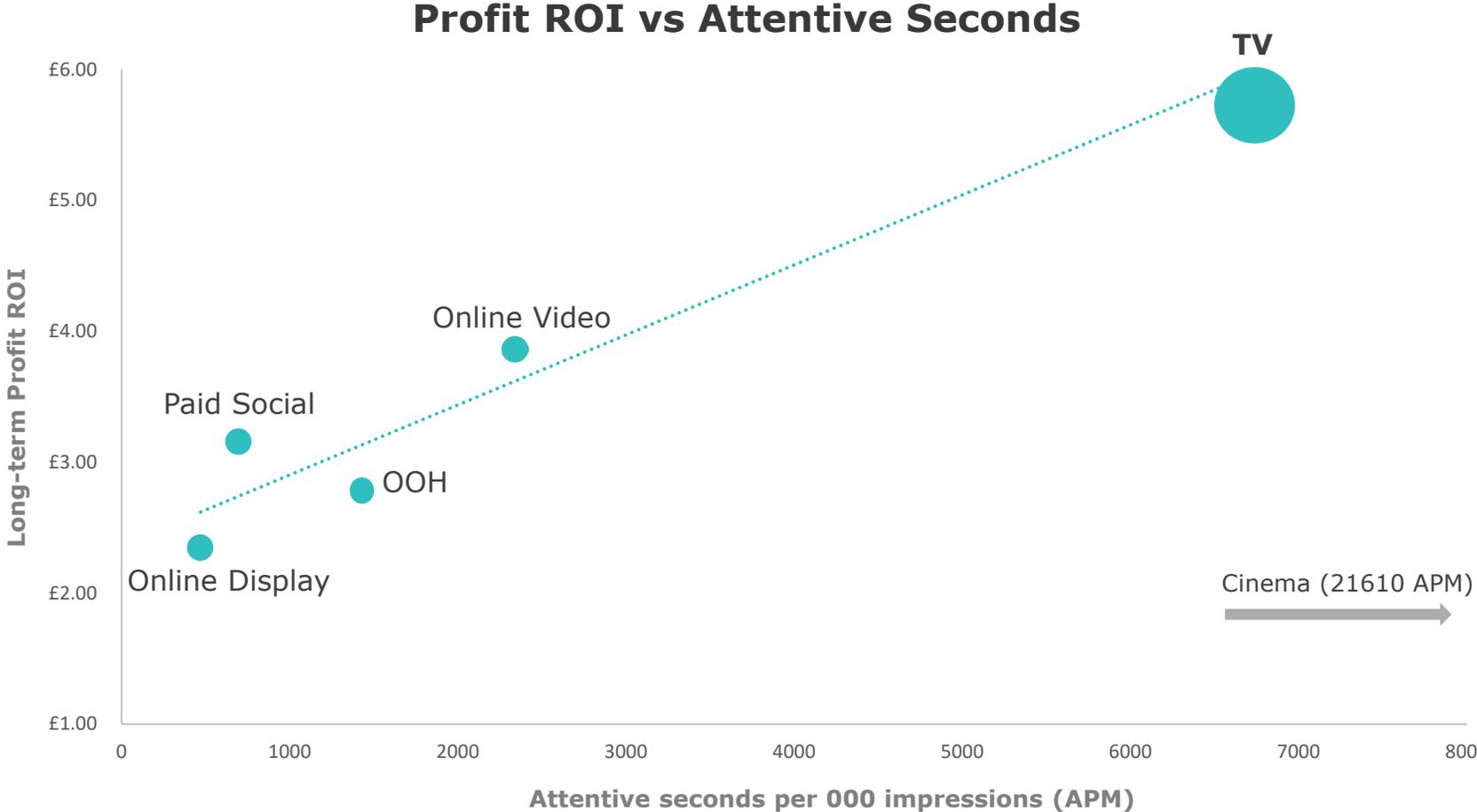
Source: Ebiquity, with Lumen, TVision and Dan White – The Challenge of Attention, 2024

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

TV delivers superior attention

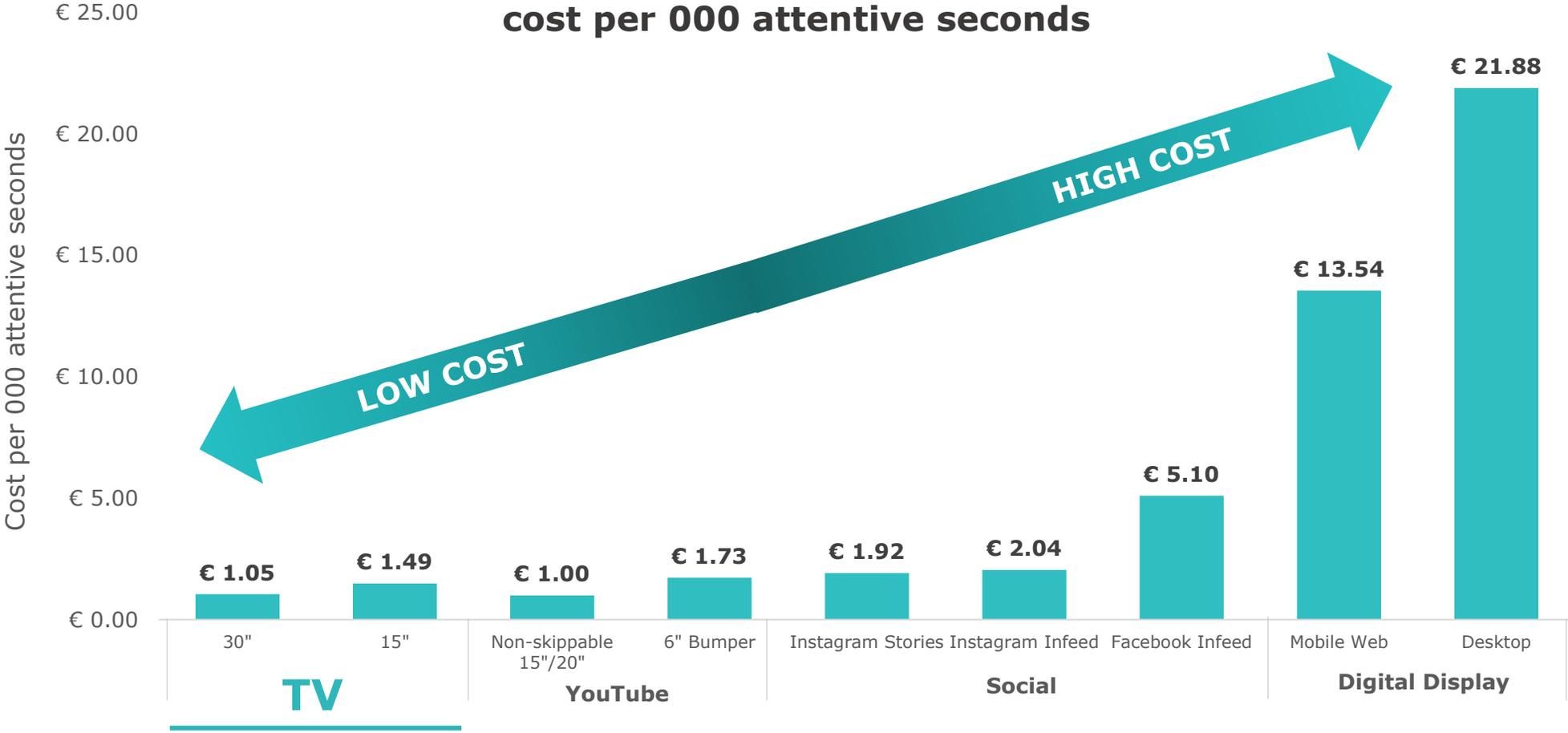
how does this play out in media?

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

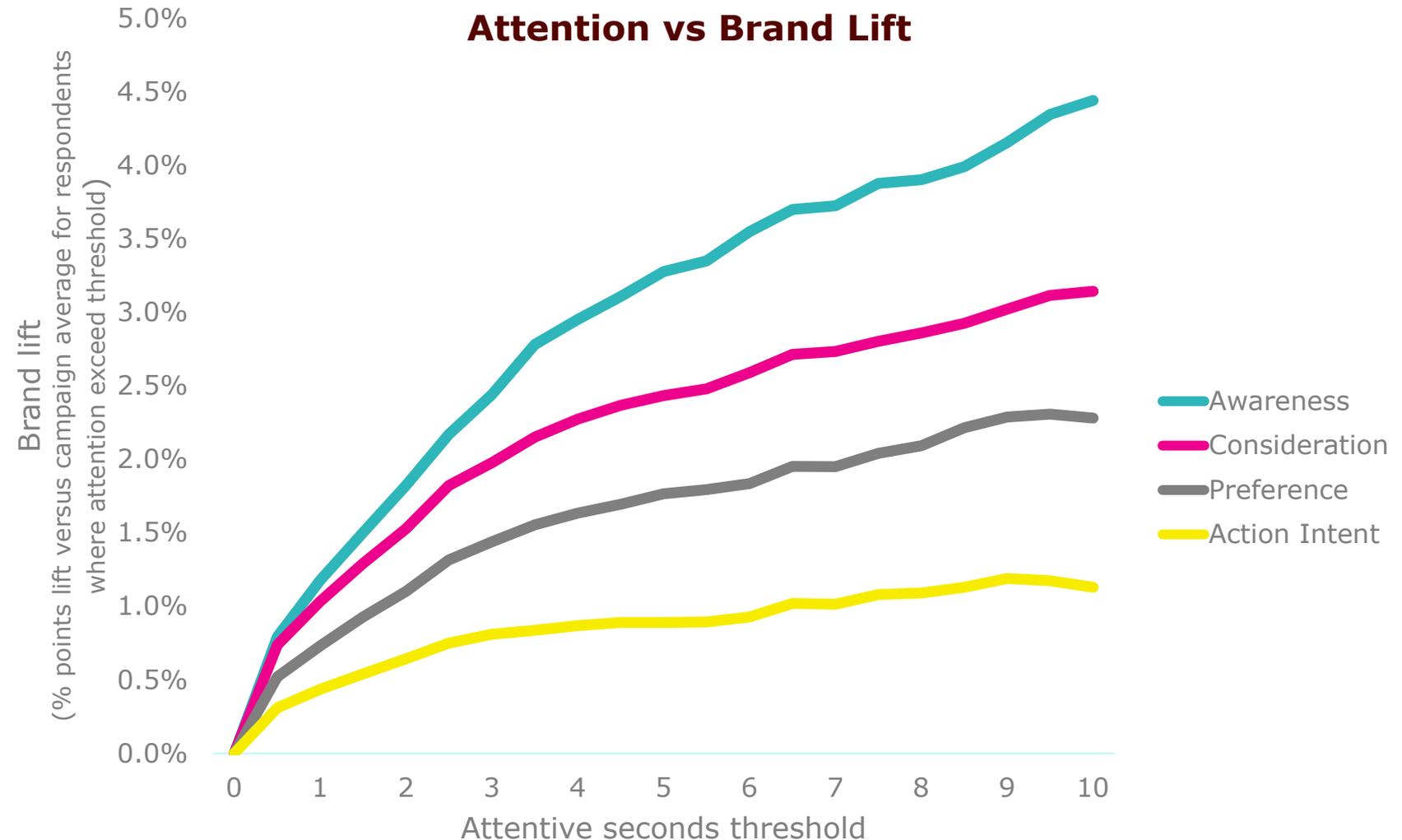


Source: Lumen [The True Cost of Advertising Attention](#)

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



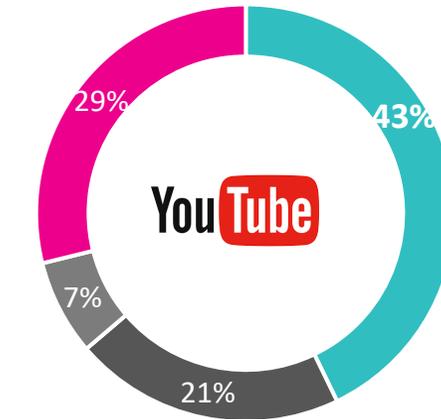
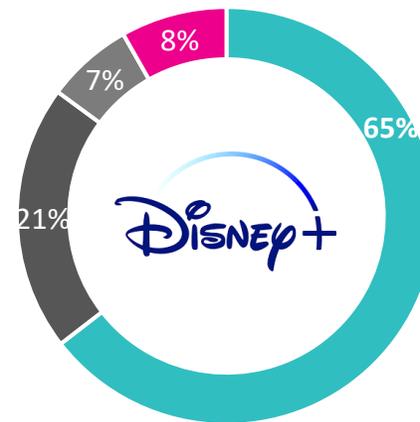
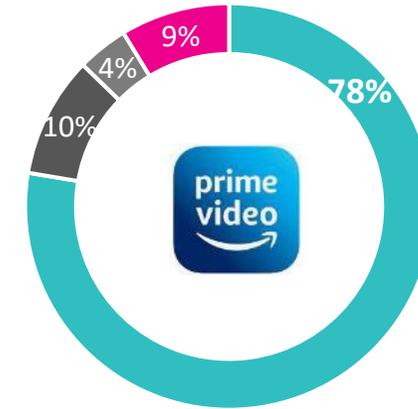
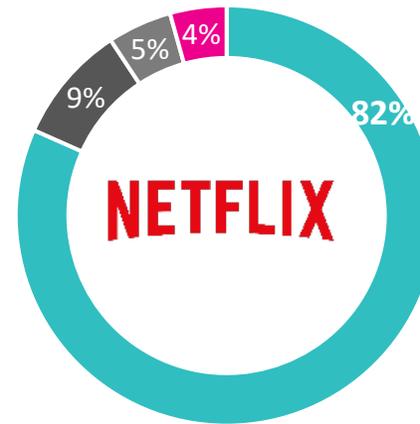
big screen = big attention

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

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

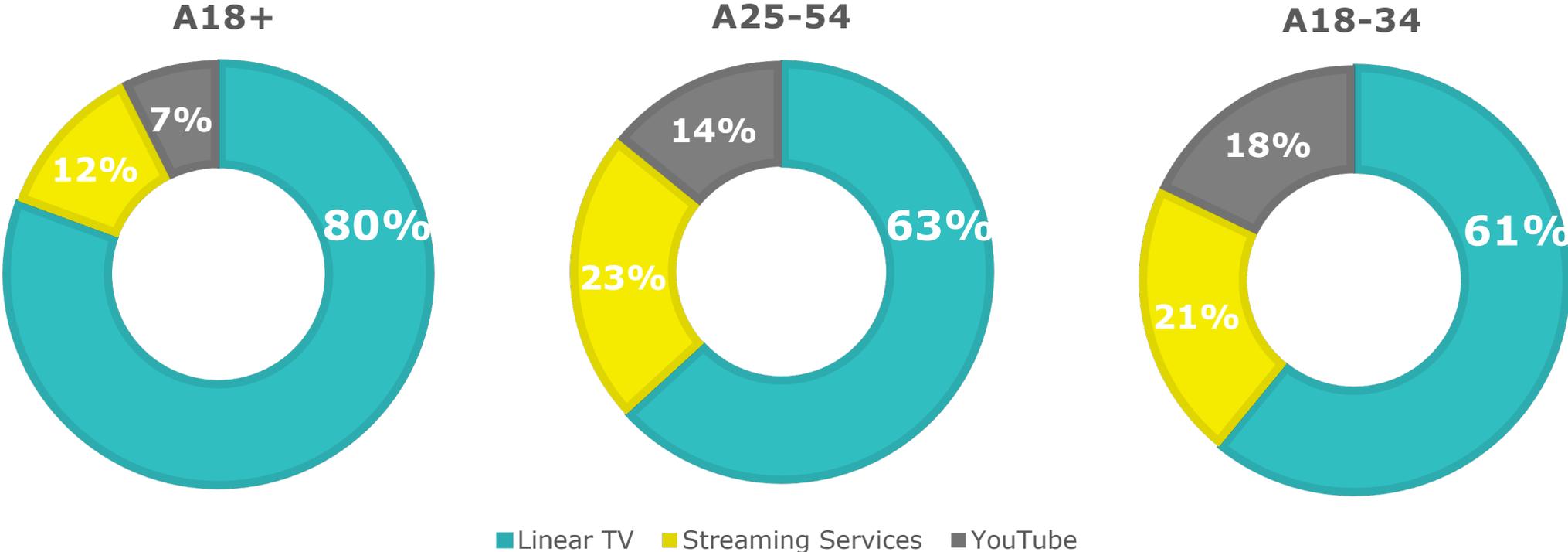
SHARE OF TUNING BY DEVICE



■ TV/Smart TV ■ PC/Mac ■ Mobile ■ Tablet

Linear TV has the big screen advantage

Linear TV makes up the majority of what we're watching on the big screen (across all demos)



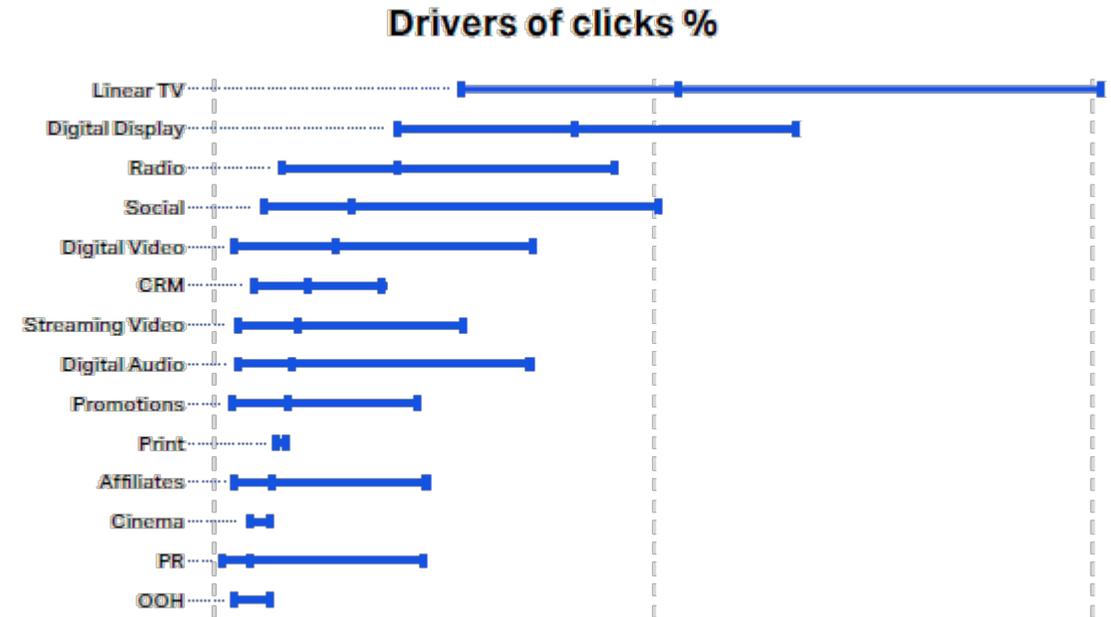
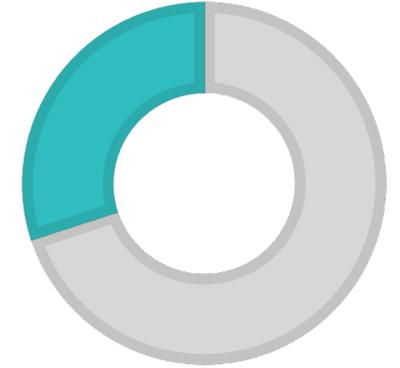
Note: Streaming Services include ad-free and ad-supported services as well as broadcaster streaming services
Source: Numeris VAM , 9/1/2025 to 11/30/2025, Total Canada | Total Time (hours) on a TV / Smart TV device. Excludes Facebook Video, Instagram Reels, TikTok; Streaming Services include broadcaster streaming services

TV makes other channels work harder

- Search is over-credited as a performance channel. **30%** of clicks are driven by other media. While another 30-60% are attributable to seasonality, loyalty, & 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



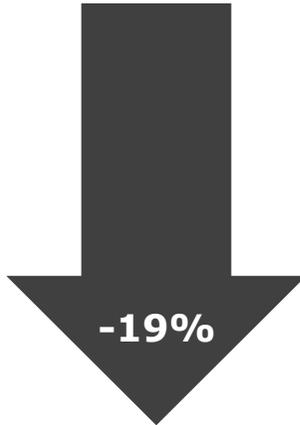
Source: Analytic Partners ROI Genome

TV improves digital's performance

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



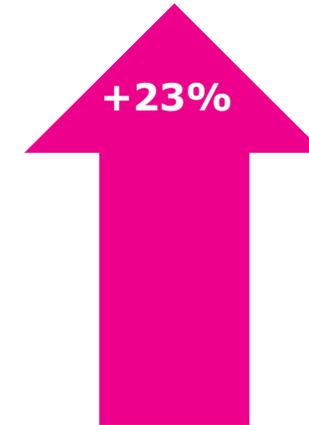
Standalone Digital ROI



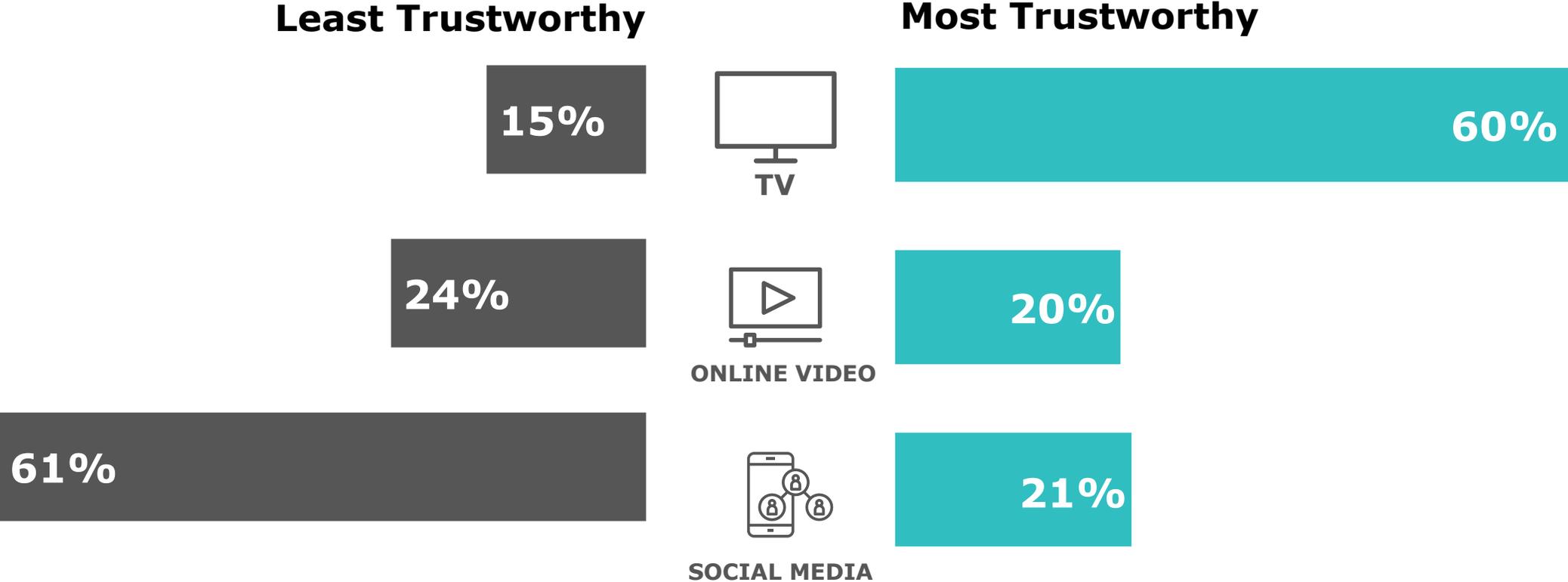
without TV's halo effect, digital advertising's average ROI would decline by 19%



TV's Adjusted ROI



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)

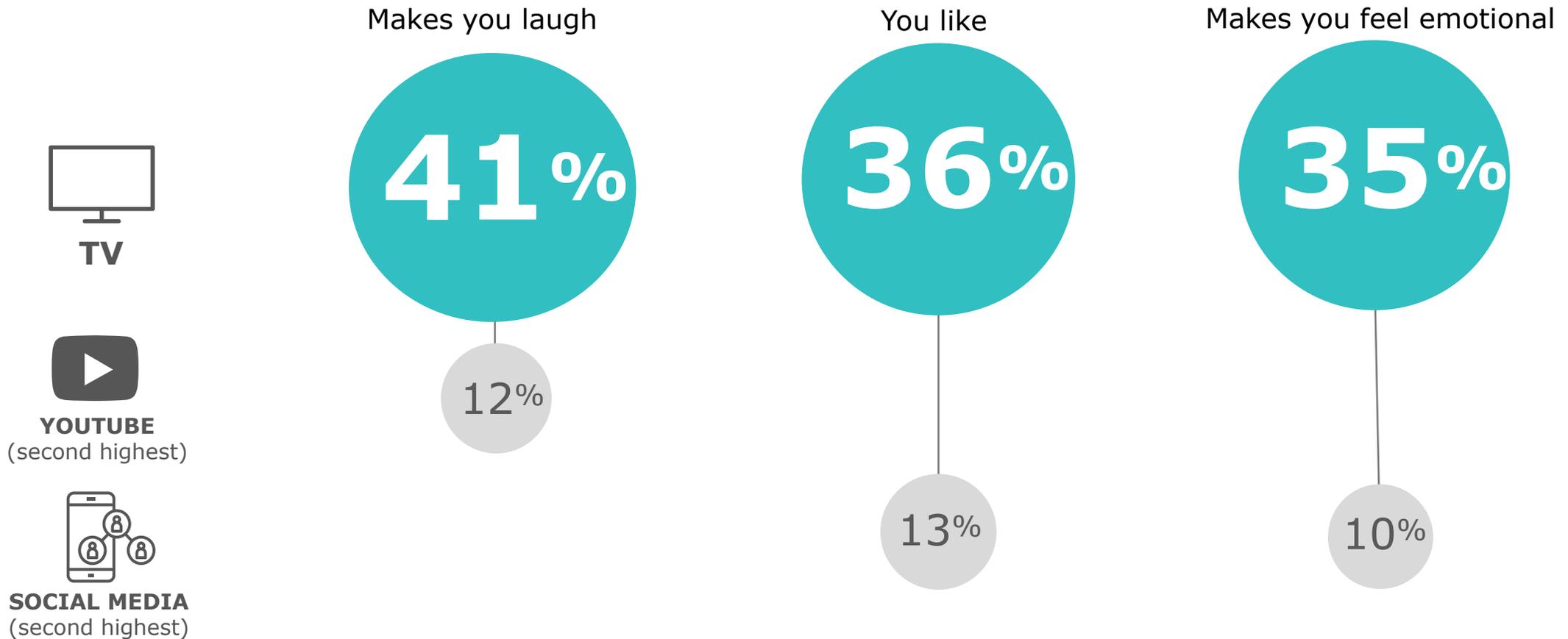


SOCIAL MEDIA

(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

TV is the best store front window

Top of the Funnel

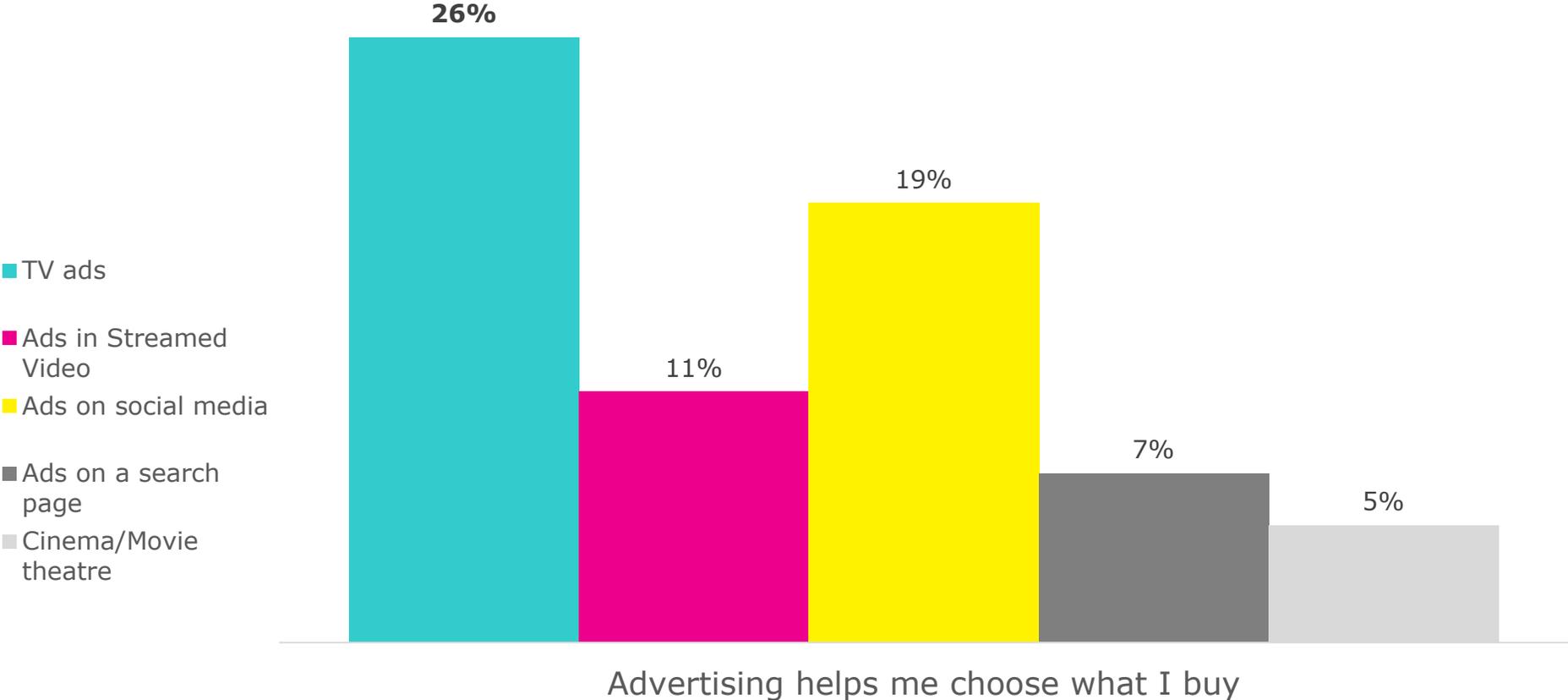
- Awareness
- Brand building
- Interest / purchase intent

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 advertising is most likely to drive purchase decisions



Source: Vividata SCC | Study of the Canadian Consumer Fall 2025 | Adults 18+

Why TV?

SCALE

90% monthly reach, largest share of time spent with video

IMPACT

highest attention, recall and trust

PROFIT

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



“ 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

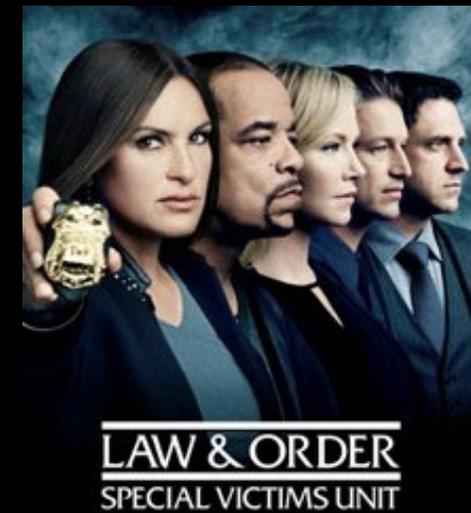
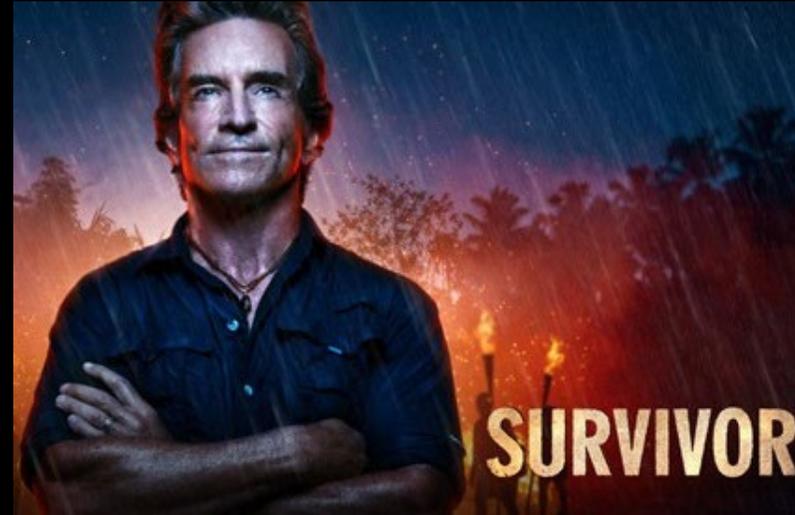


appendix

**what Canadians are
watching**



what are Canadians watching?



top 10 TV shows (English)

ADULTS 18+	Channel	AMA (000)
HIGH POTENTIAL	CTV	1434
MATLOCK	Global	1115
9-1-1	Global	1059
SURVIVOR	Global	960
ELSBETH	Global	960
NCIS	Global	924
911: NASHVILLE	CTV	913
CTV EVENING NEWS	CTV	912
SHERIFF COUNTRY	Global	907
FBI	Global	904

ADULTS 25-54	Channel	AMA (000)
HIGH POTENTIAL	CTV	341
SURVIVOR	Global	322
SATURDAY NIGHT LIVE	Global	310
9-1-1	Global	301
9-1-1 NASHVILLE	CTV	261
NCIS	Global	242
LAW & ORDER SVU	Citytv	236
FBI	Global	232
MATLOCK	Global	226
LAW & ORDER	Citytv	224

ADULTS 18-34	Channel	AMA (000)
HIGH POTENTIAL	CTV	150
SURVIVOR	Global	142
SATURDAY NIGHT LIVE	Global	139
9-1-1	Global	134
9-1-1 NASHVILLE	CTV	119
LAW & ORDER SVU	Citytv	114
LAW & ORDER	Citytv	114
SHIFTING GEARS	CTV	110
THE AMAZING RACE	CTV	102
GHOSTS	Global	98

Source: Source: Numeris PPM, Total Canada, 09/15/25 to 12/21/2025, 3+ Airing, English Conventional

top 10 sports (English)

ADULTS 18+	Channel	AMA (000)
MLB WORLD SERIES	Rogers Sports Network + Citytv	6,491
MLB ALCS (Blue Jays)	Rogers Sports Network + Citytv	3,159
MLB ALDS (Blue Jays)	Rogers Sports Network + Citytv	2,491
CFL GREY CUP	TSN+CTV	2,948
HNIC PRIME EAST	Rogers Sports Network	1,178
CFL PLAYOFFS	TSN	771
RUGBY WOMENS WORLD CUP	TSN	530
NFL LATE	TSN	504
HNIC PRIME WEST	Rogers Sports Network	494
MLB PLAYOFFS (ex Blue Jays)	Rogers Sports Network	410

ADULTS 25-54	Channel	AMA (000)
MLB WORLD SERIES	Rogers Sports Network + Citytv	2,791
MLB ALCS (Blue Jays)	Rogers Sports Network + Citytv	1,385
MLB ALDS (Blue Jays)	Rogers Sports Network + Citytv	995
CFL GREY CUP	TSN+CTV	981
HNIC PRIME EAST	Rogers Sports Network	422
CFL PLAYOFFS	TSN	248
NFL LATE	TSN	230
NHL LEAFS HOCKEY	TSN	190
RUGBY WOMENS WORLD CUP	TSN	185
HNIC PRIME WEST	Rogers Sports Network	180

ADULTS 18-34	Channel	AMA (000)
MLB WORLD SERIES	Rogers Sports Network + Citytv	1,303
MLB ALCS (Blue Jays)	Rogers Sports Network + Citytv	663
CFL GREY CUP	TSN+CTV	421
MLB ALDS (Blue Jays)	Rogers Sports Network + Citytv	384
HNIC PRIME EAST	Rogers Sports Network	201
NHL LEAFS HOCKEY	TSN	199
RUGBY WOMENS WORLD CUP	TSN	124
NFL LATE	TSN	111
CFL PLAYOFFS	TSN	98
NFL EARLY	CTV	83

Source: Numeris PPM Total Canada, 09/15/25 to 12/21/2025 | CityTV/Fox feed included in MLB playoff simulcasts

let's go Blue Jays!

The 2025 World Series reached over 23 Million Canadians, and the nail-biting Game 7 generated an incredible 10.74M AMA



in case you missed it

check out these additional research reports & presentations



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 »](#)



profit ability 2

This meta-analysis of the drivers of advertising effectiveness shows how and why advertising is a profitable driver of business growth, and which media drives the biggest impact.

[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.

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