



Breaking Down Linear and Digital Audiences

How do they converge?



The options for consuming video content are more diverse than ever. With the advent of streaming services in addition to linear television, viewers have a wide array of choices. The plethora of available options creates even more questions. Do viewers of linear television also use streaming services? Do viewers of streaming services also watch linear television? How much exclusivity is there between the two?

Numeris' VAM data provides answers to these questions and more, all within a single dataset. The data not only measures the extensive range of linear television channels - it also includes 24 Pure Play services. National VAM is launching in Fall 2025 and will easily provide insight into video consumption across Canada and today's VAM data, covering Ontario and Quebec Franco, is already unveiling valuable insight into video consumption trends. Let's take a look at the data from this past Winter season and see what we can learn about the video behaviours of Canadians.

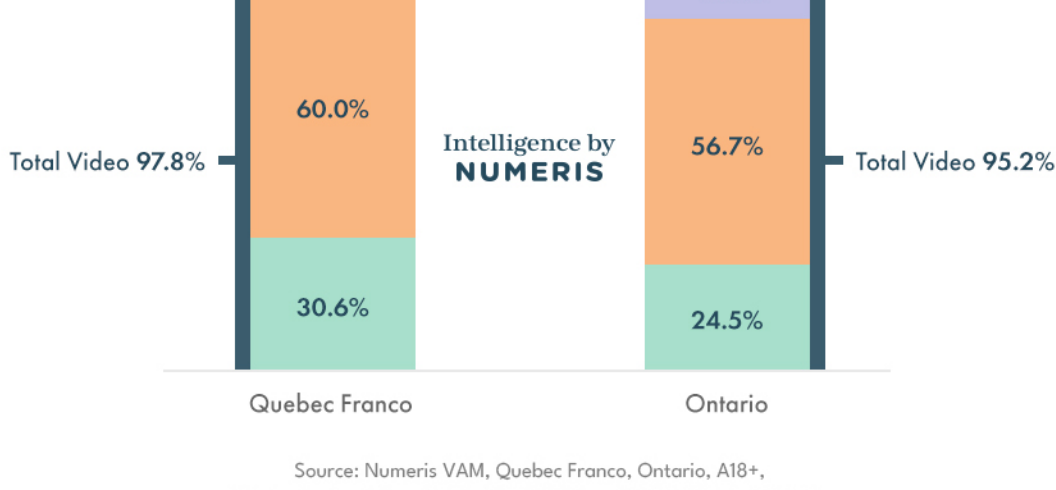
Majority of Streaming viewers also consume Linear TV

Oftentimes it's assumed that those who stream Video content do not consume Linear television. Through the power of VAM, we can easily debunk that assumption as we can identify audiences reached exclusively by Linear television, those who exclusively engage with Streaming, or those who are consuming both.

This past Winter in Ontario, over 95% of adults 18+ engaged with video on a weekly basis, while this figure rises to nearly 98% in Quebec Franco. Of those, a significant portion of viewers (60% in Quebec Franco and 56.7% in Ontario) consumed content from both Linear TV and streaming services in an average week. However, almost 31% of Quebec Franco adults exclusively viewed content through Linear TV, compared to 24.5% in Ontario, while Streaming-only viewers accounted for 7.2% among Quebec Franco adults and 14% in Ontario.



Weekly Reach of Total Video – Exclusive vs. Shared Adults 18+, Winter 2025



Source: Numeris VAM, Quebec Franco, Ontario, A18+, Mo-Su 2a-2a, Winter 2025: 11/25/2024 to 2/23/2025, AvWkRch%

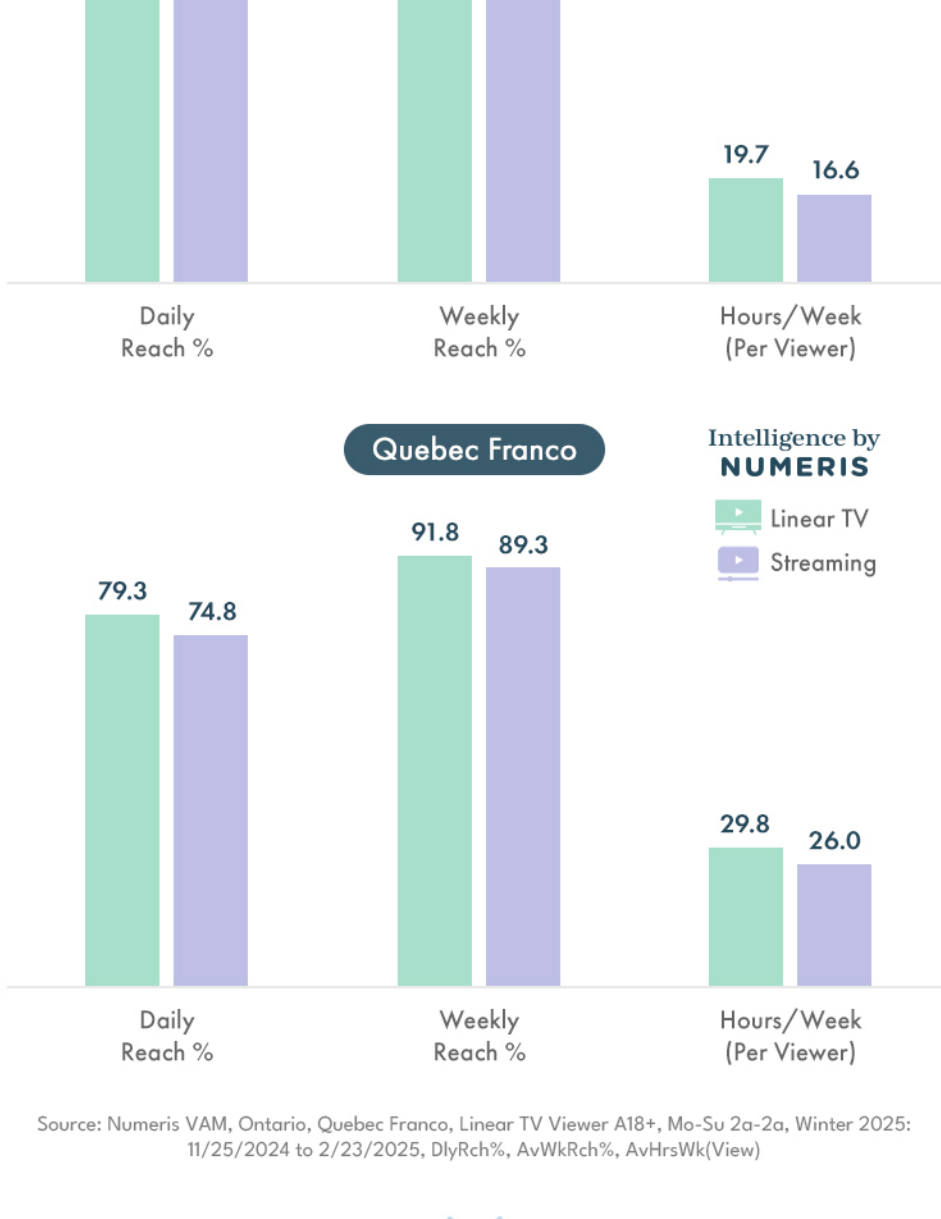
Behaviours of Linear TV Viewers

Now that we know a majority of viewers consume both Linear and Streaming content, we can go deeper and analyze how they spent their time with Video this past Winter.

In Ontario, of the adults 18+ who watched Linear Television each week, we see that they spent over 19 hours per week with Linear TV compared to 16.6 hours per week with Streaming. That same group had an average weekly reach of 83.3% with Linear TV versus 79.8% with Streaming.

As for Quebec Franco viewers, we can see a similar pattern in Ontario, however, reach and time spent in this market is significantly higher for both platforms. In Quebec Franco, among those watching Linear TV each week, 79.3% are watching Linear content daily, and almost 92% weekly. Of those same people, 74.8% are watching Streaming content daily and 89.3% weekly. Weekly hours show that viewers of Linear Television spend almost 30 hours with Linear and 26 hours with Streaming.

Behaviour of People who Watch Linear Television Each Week Linear TV Viewer A18+, Winter 2025



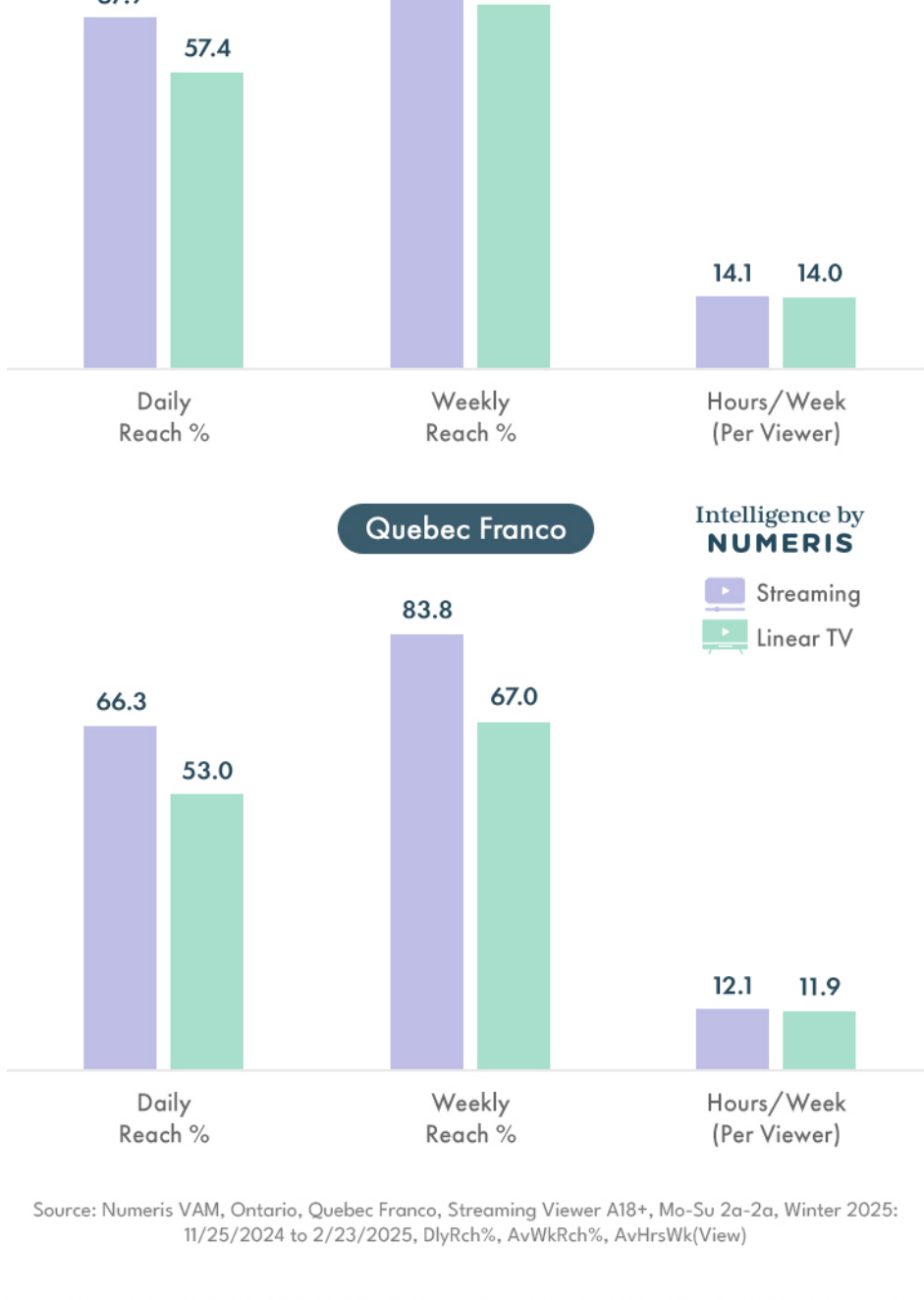
Source: Numeris VAM, Ontario, Quebec Franco, Linear TV Viewer A18+, Mo-Su 2a-2a, Winter 2025: 11/25/2024 to 2/23/2025, DlyRch%, AvWkRch%, AvHrsWk(View)

Behaviours of Streaming Viewers

On the flip side, we can also dig deeper into the behaviours of those who Stream video content each week. In Ontario, of those adults 18+, weekly hours show virtually the same amount of time with Linear TV as they do with Streaming, at approximately 14 hours.

The same story unfolds in Quebec Franco, where those who are Streaming each week spend the same amount of time with Linear Television and Streaming at around 12 hours per week. Of these same people, 83.8% are watching Streaming content on a weekly basis, compared to 67% with Linear TV. Daily reach virtually shows the same trend.

Behaviour of People who Watch Streaming Each Week Streaming Viewer A18+, Winter 2025



Source: Numeris VAM, Ontario, Quebec Franco, Streaming Viewer A18+, Mo-Su 2a-2a, Winter 2025: 11/25/2024 to 2/23/2025, DlyRch%, AvWkRch%, AvHrsWk(View)



The bottom line?

While the majority of video consumers balanced their time between Linear TV and Streaming last Winter, it's clear that these viewers have a preference. Those who favour Linear TV tend to dedicate more hours to their choice, and the same goes for streaming enthusiasts. However, Linear TV and Streaming viewing continue to co-exist highlighting the evolving landscape of video consumption. Understanding the convergence of these viewing habits is a significant advantage offered by VAM. Stay tuned to see if the patterns remain consistent as we move into Spring!

Discover current trends in Ontario and Quebec Franco today and get ready for National VAM in Fall 2025!

If you have any questions, contact Numeris Client Solutions.

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