

Fall Video Overview

Numeris' Cross-Platform Video solution, VAM, uniquely offers a combined view of the dynamic linear and digital video landscape in Ontario and Quebec Franco. The valuable insights it provides sets the stage for what to expect with the highly anticipated National VAM launch coming in Fall 2025.

Leveraging the wealth of data available in VAM, including device and platform level trends, let's look at how Canadians consumed video content, at the device level, in Fall 2024.

Smart or Connected TV Usage

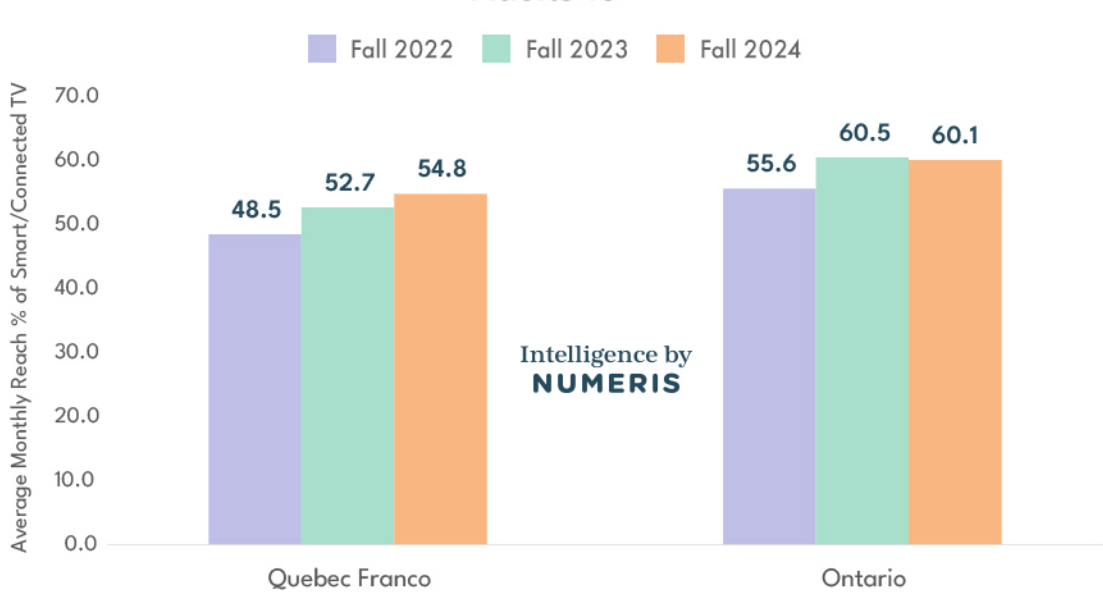
When you purchase a new TV today, most either come as a Smart TV or they can connect to other third-party devices, which allows for easier access to non-linear content. The result of this enhanced technology has led to a gradual increase in the use of these devices for streaming services.

Among adults 18+ in Ontario, monthly use of Smart or Connected TVs to view streaming content rose from 55.6% in Fall 2022 and has remained flat above 60% in Fall 2024. In Quebec Franco, monthly use grew from 48.5% in Fall 2022 to 54.8% in Fall 2024.



Smart or Connected TV Monthly Reach

Adults 18+



Source: Numeris VAM, Quebec Franco, Ontario, A18+, Mo-Su 2a-2a, Fall 2022: 8/29/2022 to 11/27/2022, Fall 2023: 8/28/2023 to 11/26/2023, Fall 2024: 8/26/2024 to 11/24/2024, AvMRch%

While streaming is on the rise, Linear TV viewing maintains its dominance

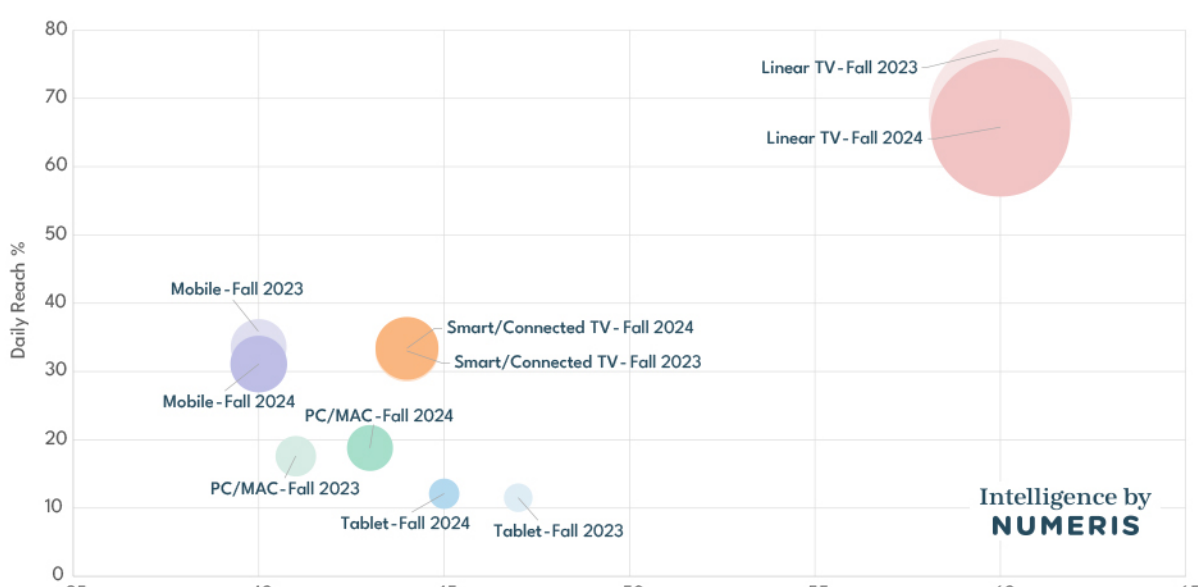
While the streaming proportion of Total Video grew by 3% in Ontario and 2% in Quebec Franco, Fall over Fall, Linear TV retains its position as the preferred way to consume all content.

When delving into device usage trends, we can examine the relative volume of total viewing by device against the average weighted age of viewers. What we see is that Linear TV holds significant ground, while streaming on devices, such as the 'PC/MAC', continues to grow.

Linear TV remained dominant in sheer volume of viewing and reported a daily reach of 65.8% in Fall 2024. PC/MAC use saw a positive change in the streaming space with an increase in daily reach (18.8% in Fall 2024), and an increase in volume (+29%) but with a slightly older profile at 43 years on average (+2 years). The Smart/Connected TV changed very little in daily reach, average age and volume of use, Fall over Fall. Tablet usage grew younger on average, while mobile fell slightly in daily reach.

Total Video Consumption by Device - Adults 18+

Average Weighted Age, Daily Reach % and Relative Volume of Viewing



Source: Numeris VAM, Total Sample (Ont+Que Fr), A18+, Mo-Su 2a-2a, Fall 2023: 8/28/2023 to 11/26/2023, Fall 2024: 8/26/2024 to 11/24/2024, WAvAge, DlyRch%, TotTime(000) [minutes]

Canadians engage with video content across multiple devices

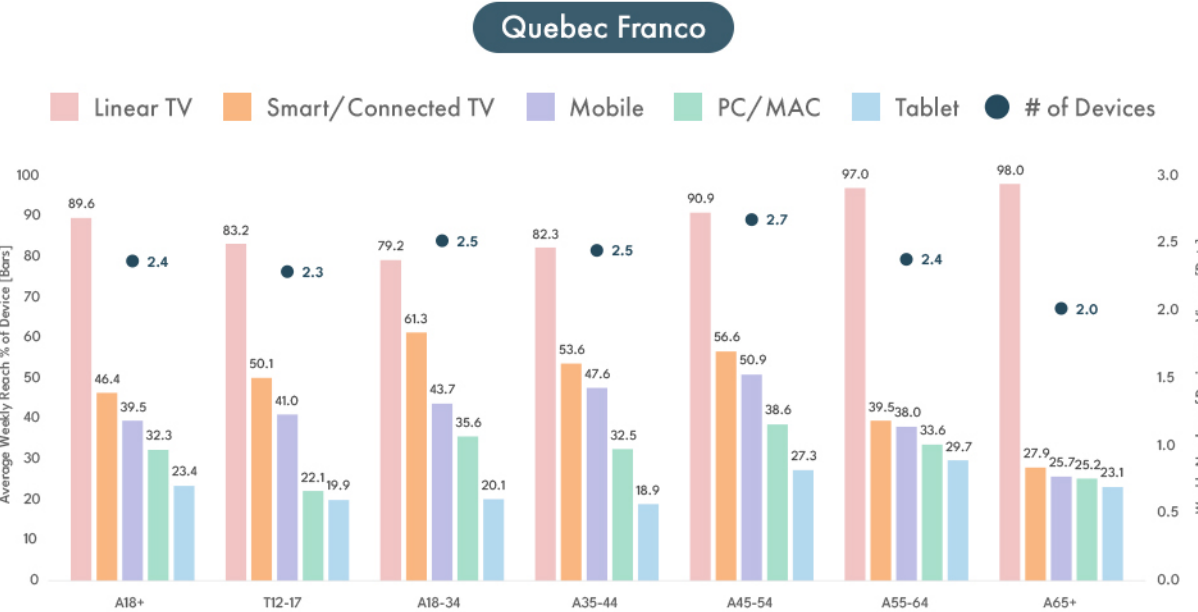
With linear television continuing to be the predominant choice for video content each week, it is almost universally followed by the Smart/Connected TV, Mobile, PC/MAC, and Tablet. Adults aged 45-54 use the most devices, averaging 2.7 per week in Quebec Franco and 2.6 per week in Ontario. Usage of Linear TV and tablets typically increases with age, whereas the use of other streaming devices peaks among younger adults and declines with age. Interestingly, teenagers exhibit lower video consumption rates on mobile phones compared to young adults, particularly in Ontario.

Weekly Reach by Device vs. Weekly Number of Devices per Viewer

Fall 2024

Intelligence by NUMERIS

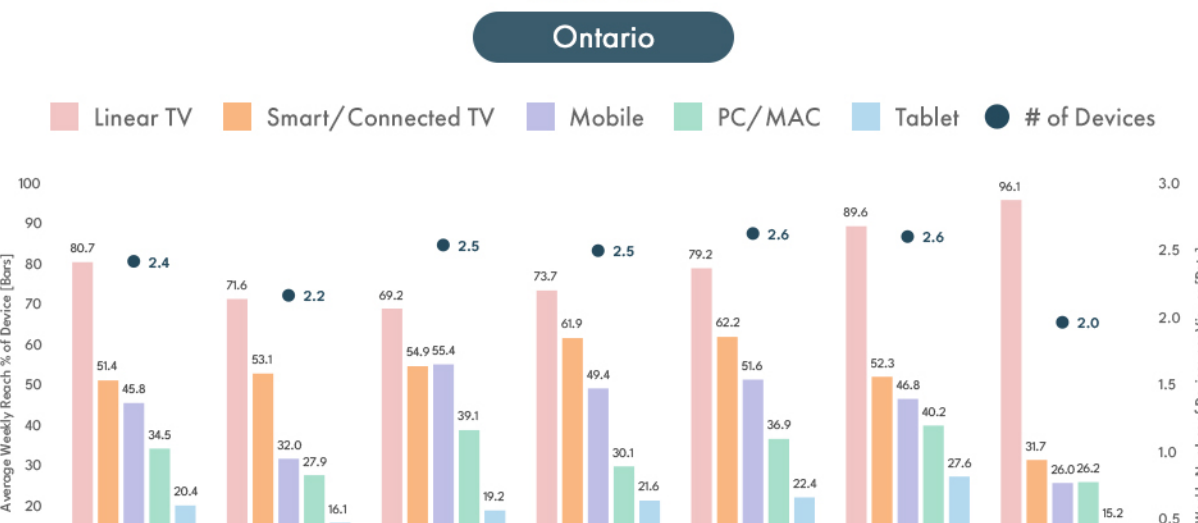
Quebec Franco



Source: Numeris VAM, Quebec Franco, Mo-Su 2a-2a, Fall 2024: 8/26/2024 to 11/24/2024, AvWkRch%

Intelligence by NUMERIS

Ontario



Source: Numeris VAM, Ontario, Mo-Su 2a-2a, Fall 2024: 8/26/2024 to 11/24/2024, AvWkRch%

The takeaway? While streaming services on Smart and Connected TVs continue to grow in popularity, linear television still holds a significant share of video consumption.

Stay tuned for more data and trends from VAM as we gear up for the exciting launch of Canada's National Cross-Platform Video solution, National VAM, this Fall!

If you have any questions, contact Numeris Client Solutions.

I Have Questions!

Access VAM Data in the Cross-Platform Video Insights Tool on the Numeris Client Site Now!



Visit our Glossary for all cross-platform, cross-media terms and definitions.

