

Roku
CANADA

▶▶▶ **VOD** ▶▶▶
EVOLUTION

2027 STUDY

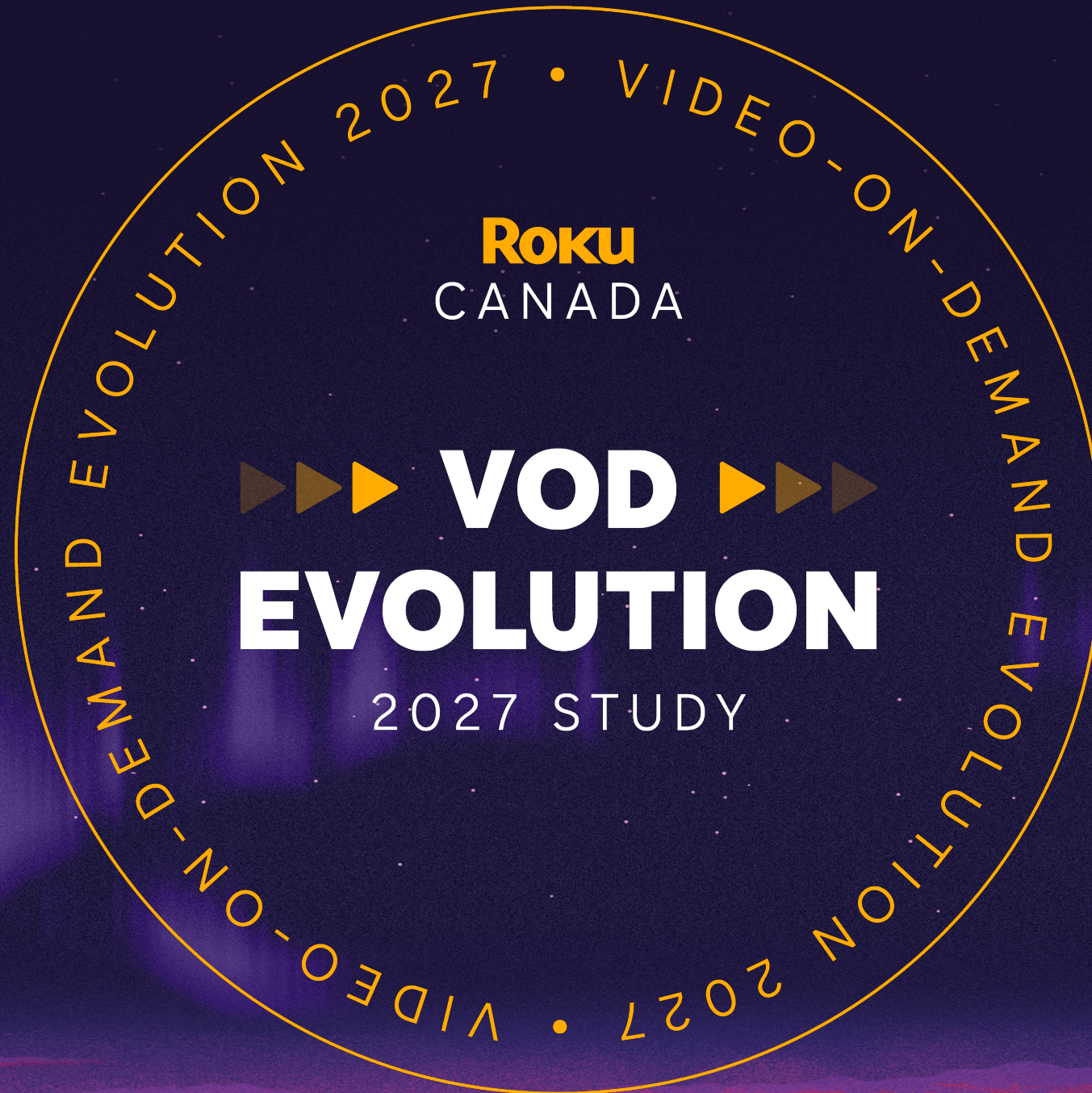




Table of Contents

INTRODUCTION	03
Streaming isn't an alternative to TV. It is TV.	
CHAPTER 1	04
Canada is a streaming nation.	
CHAPTER 2	07
A familiar problem: finding something to watch.	
CHAPTER 3	10
Streaming ads with impact.	
KEY TAKEAWAYS	13
5 key learnings every advertiser can apply today.	
Glossary • Methodology • About Roku	14
Forward-Looking Statements	17

INTRODUCTION

Streaming isn't an alternative to TV. It is TV.

Nearly every TV viewer in Canada now streams. They give it hours of attention every week, most of it against advertising that is ad supported — and they do it on a medium that can prove what that attention delivered. Yet advertising investment still trails the time spent.

In the seventh year of our research, the headline trend continues. Streaming audiences keep growing, and as platforms expand what they offer, the time people spend with them grows too.

Streaming TV is the norm

27M

Canadian adults watch streaming services

88% of all Canadian TV viewers

84%

of streamers watch ad-supported streaming services at least once a month

Streamers spend almost

12

hours a week streaming content with ads.

54%

of sports fans are now watching live sports and sports content through streaming platforms.

Ad-supported viewing is no longer the compromise option. It now accounts for 47% of all streaming time, cable and satellite viewing continues to slide, and more than a third of Canadian TV streamers (37%) have never had a cable subscription at all — a cohort for whom the distinction between streaming and television never existed in the first place.

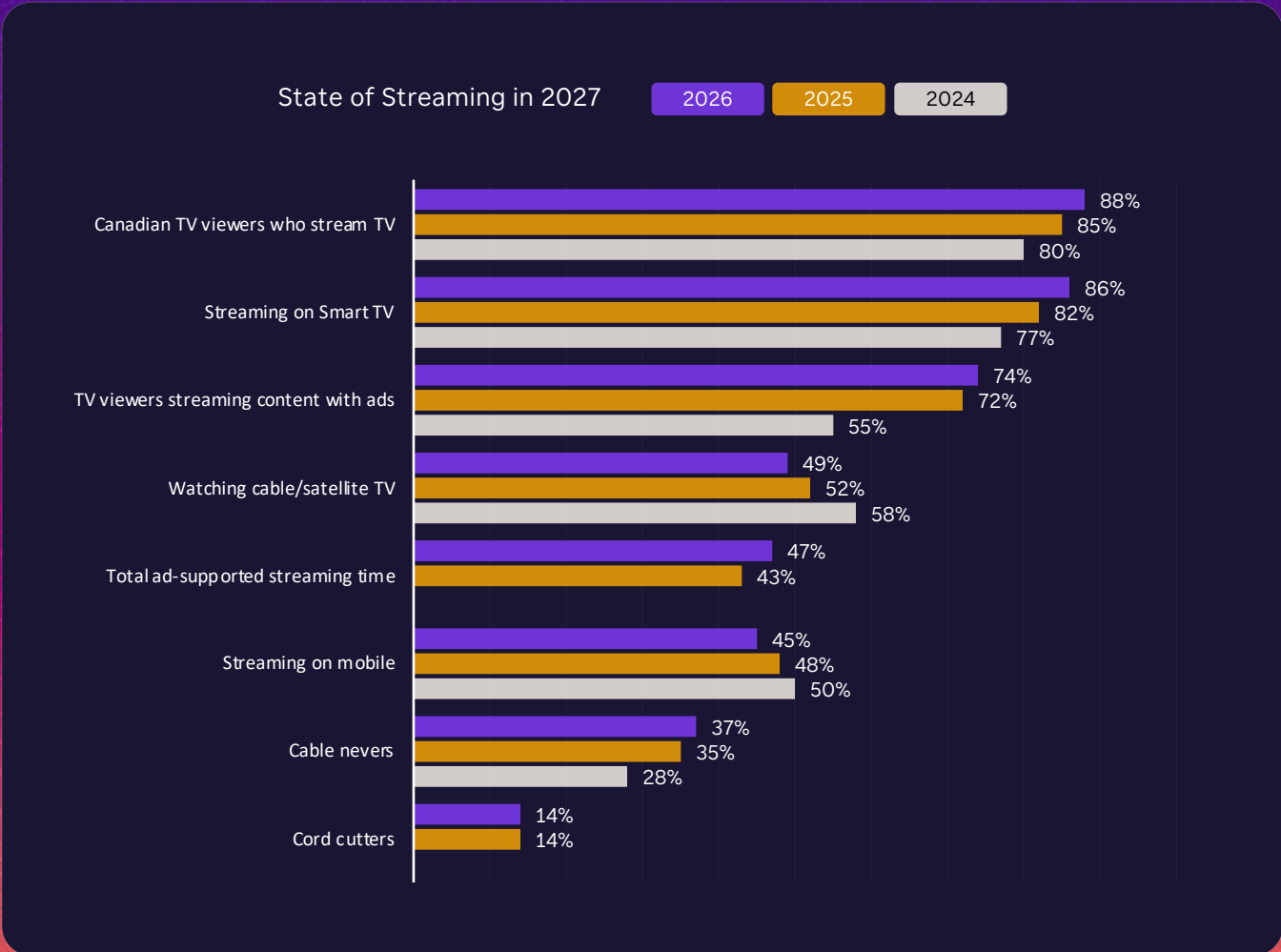
All of which makes the shortfall in ad investment harder to justify. Advertisers moving into the channel get an engaged, diverse audience, visibility across the platforms those viewers move between, and the targeting and measurement capabilities to serve the right ads to the right people and optimize as campaigns run.

The ads themselves are evolving too. Interactive formats and sponsored playlists give advertisers fast routes to conversion alongside brand-building — and they do it while helping viewers solve the age-old streaming problem: what should I watch next?

Video-on-Demand Evolution 2027, our annual study of how Canadians watch streaming TV, is designed to help advertisers understand this audience and navigate the landscape they're watching in. In this whitepaper you'll discover:

- How much time Canadians spend streaming, what they're watching, and how they find their next show.
- How streaming TV is becoming a destination for sports fans.
- Which streaming ad formats land hardest — and what ads streamers actually want to see.

Streaming TV is the norm. It's time to get in the game.



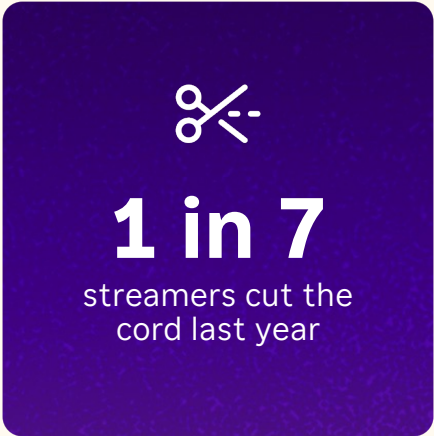
CHAPTER 1

Canada is a streaming nation



Canada is a streaming nation

Cable is less relevant than ever. For the seventh-year running, streaming audiences have grown and they’re continuing to cut the cord – 1 in 7 streamers told us they had cancelled their cable in the last year, moved to streaming, and have no plans to go back. Our research suggests that live and sports are now contributing more to the continued growth in streaming activity.



Streaming is the default way to reach TV viewers

As more channels arrive on streaming platforms, more Canadians appear to be finding they can replace cable with streaming – most streamers regularly stream linear and scheduled channels, the same kind of content they would have watched on cable.

Of all streamers:

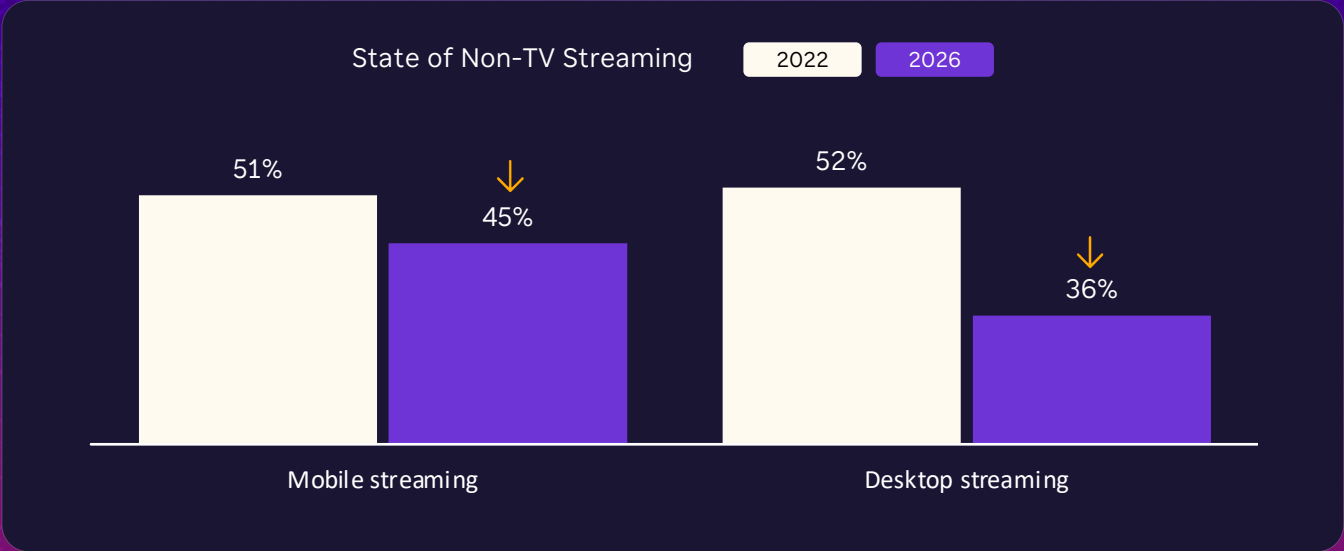


Those who stream linear content, such as broadcast TV and FAST channels, spend an average of 6.4 hours a week watching it – nearly a quarter of all the time they’re spending watching TV.

On Roku, advertisers can seamlessly reach these viewers across 25+ premium channel apps and 200+ FAST channels – including French-language channels – in a single buy through Roku Publisher Media, with targeting and programmatic access available.

Smart TVs are the primary device for streaming

Smart TVs remain the favourite device for streaming TV, with 86% of streamers watching this way. Roku continues to gain share of that living-room viewing as the **#1 TV Streaming Platform in Canada**.¹ Mobile streaming has been on a steady decline since 2024 – just 45% watch on their mobile device now, compared with 51% in 2022. It’s the same story for streaming on a computer – where more than half (52%) of streamers watched on their desktops in 2022, just 36% do now. It’s another sign that streaming can replace the TV experiences provided by cable.

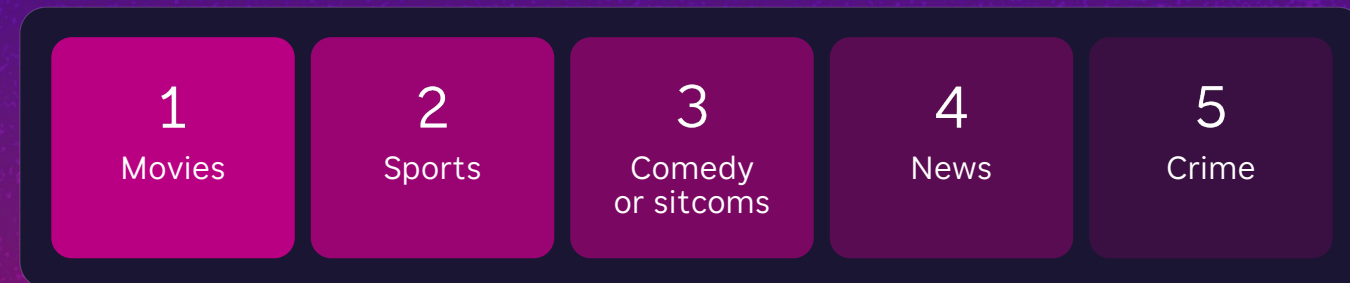


FAST channels are growing... fast

FAST (free ad-supported streaming TV channels) are streaming channels with the look and feel of linear TV, with themed, scheduled programming with regular ad breaks. They've exploded in popularity in recent years as they offer relaxed, lean-back TV viewing experiences, and enable binges on old TV favourites.

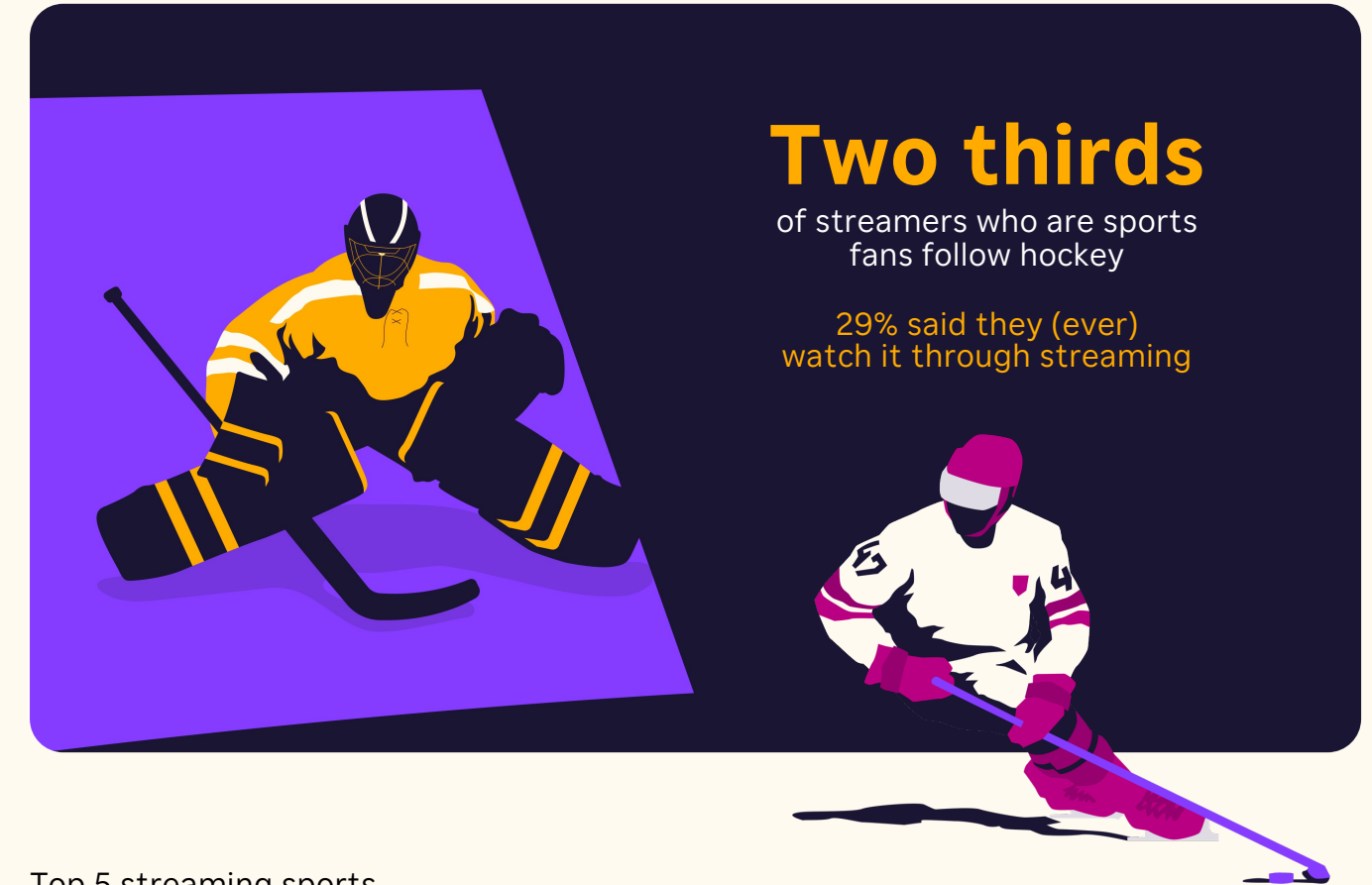
Our study found that nearly 6 out of 10 streamers routinely watch live or scheduled channels through streaming. What's more, it's not completely passive viewing. Streamers still want choice and curation - 58% of streamers said sometimes they prefer to choose what to watch from browsing a TV channel guide, rather than having to look for a specific show or movie. Roku Channel carries more than 200 FAST channels for streamers who want that lean-back experience, including French-language channels such as TVA+, channels built around a single genre (48 Hours for true crime, CTV News), and channels dedicated to one show (Little House on the Prairie, The Price Is Right) — all with regular in-stream ad breaks built into the viewing experience.

Top 5 content types for streaming live

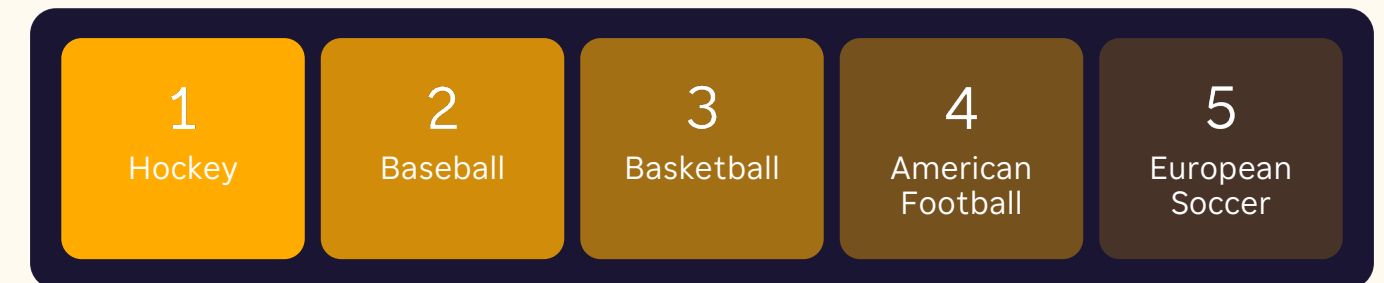


More than half of sports fans now stream sport

Nearly two-thirds (64%) of streamers are sports fans, who follow sports all the time or tune in for the big events. Of these, more than half (56%) are watching live sports and sports content through streaming platforms.



Top 5 streaming sports



Sports fans' appetite for live streaming is an opening for brands as well as broadcasters. On Roku, a sponsored Sports Zone on the Home Screen reaches viewers before they enter an app — a place to pull the week's live matches, highlights and analysis together under a brand's name, whatever service the rights sit with.

CHAPTER 2

A familiar problem: finding something to watch



A familiar problem: finding something to watch

With so much quality content available on streaming platforms, it's no wonder that Canadian streamers spend an average of almost 12 hours on the services each week.

However, with all those attractive streaming options, they're still finding it tough to find the shows or movies they're looking for, or to discover new content.



Canadian streamers use an average of **3.6 different streaming platforms**

Including 2.5 paid subscriptions on 1 free service

Streamers find the search for something to watch “exhausting”

We found that on average, after turning on their TV, streamers spend an average of 13 minutes looking for something to watch. A fifth (20%) told us that they often spend more than 20 minutes in their search – you could watch an entire episode of some sitcoms in that time.

This experience is a pain point for streamers – 6 out of 10 described this hunt as “exhausting”, while two-thirds of streamers think there are too many TV streaming services to keep track of.



Streamers spend an average of **13 minutes** looking for something to watch

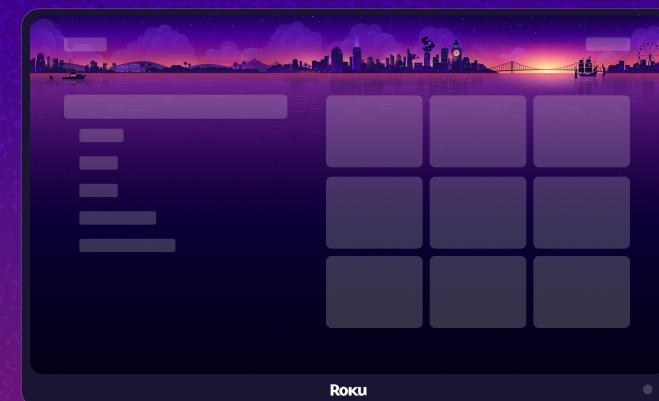
The Home Screen helps streamers discover new shows & movies

When it comes to the TV viewing experience, streamers crave ease and simplicity. Three-quarters (74%) said that they don't care which service has the content they want to watch, they just want to be able to find it easily.

It appears the Home Screen can provide this ease – nearly two-thirds (64%) of streamers use it to find something to watch, such as new or trending releases, or content based on their viewing preferences. On Roku, the streaming journey starts on the Home Screen, which reaches all Roku streamers before they open a single app. Native display placements and content sponsorships there put a brand into the exact moment the search begins – including Brand Showcase, where a click plays the brand's video ad surrounded by branded wallpaper and a clickable offer.

With a view to ending this long search for new content, we asked streamers what they would like to see from the Home Screen, and how the browsing experience could be made easier for them.

Among the features they'd like to see are a display listing all the top shows and movies they could watch for free (cited by 74%), while almost all streamers (92%) said they'd find promoted sections, better search, and a TV channel guide helpful.



Streamers crave a more helpful Home Screen



74%

want their Home Screen to display – in one place – all the top shows and movies they can watch for free



92%

would find promoted sections, better search, and a TV channel guide on their Home Screen helpful

Sports fans want all sports content in the same place

More than half of sports fans are now watching live sports and sports content through streaming platforms. But sports fans are also finding it challenging to find their games and other sports content, such as highlights and analysis, a problem made worse by the fact that coverage of some sports leagues can span several platforms.

Of all sports fans who stream:

60% think sports are spread across too many TV services

54% said it's tough to remember or work out which TV services has the sports content they want to watch

50% said they don't always know which TV service has the sport or match they want to watch

With the proliferation of sports content now available on streaming platforms, it's no surprise that sports fans would like to see something similar on the Home Screen. Nearly two-thirds (65%) of sports fans said that they would like to see all sports content across their streaming services in one place on their TV, so that it's easier to find. Nearly half (47%) added that they would like a brand more if it sponsored such a display on their Home Screen.

That 47% is a direct sponsorship opportunity: a branded sports zone solves the fan's discovery problem and earns the brand credit for solving it — what's more it reaches all Roku streamers, including those who cannot be reached with in-stream ads at all.

Box out: Sport preferences vary slightly by age

Older streamers are generally more likely to watch the NFL Stanley Cup, the Super Bowl and the CFL Grey Cup, while the youngest streamers are more likely to favour the NBA finals and F1 Grand Prix than their more mature counterparts.

Different events appeal to different age groups

	All streamers	A18-24	A55+
NHL Stanley Cup	44%	22%	55%
Super Bowl	29%	19%	34%
NBA Finals	19%	24%	14%
CFL Grey Cup	17%	4%	29%
F1 Grand Prix	9%	13%	7%



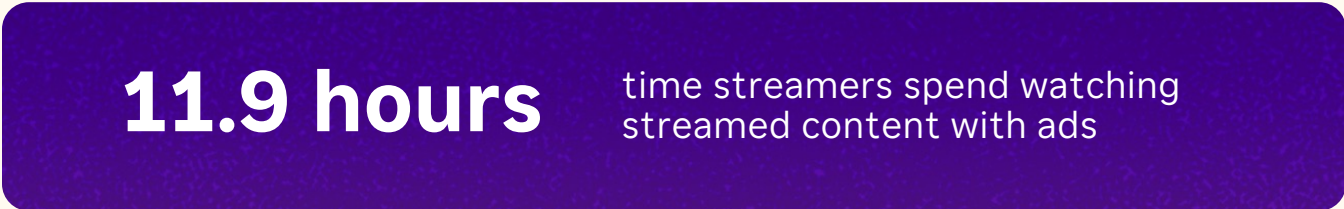
CHAPTER 3

Streaming ads with impact



Streaming ads with impact

Streamers’ time watching ad-supported content continues to climb. On average, they spend nearly 12 hours a week watching streaming content that contains ads – almost two hours more than last year (10.2 hours).



Ad-supported content also accounts for almost half (47%) of their total time streaming – up from 43% last year. And as our research shows, streamers are responding to these ads.

Two-thirds of streamers respond to TV ads

TV continues to provide itself as an effective form of advertising – we found that two-thirds (67%) of streamers have responded to a TV ad in some way.

Percentage of streamers who have done the following after seeing a TV ad

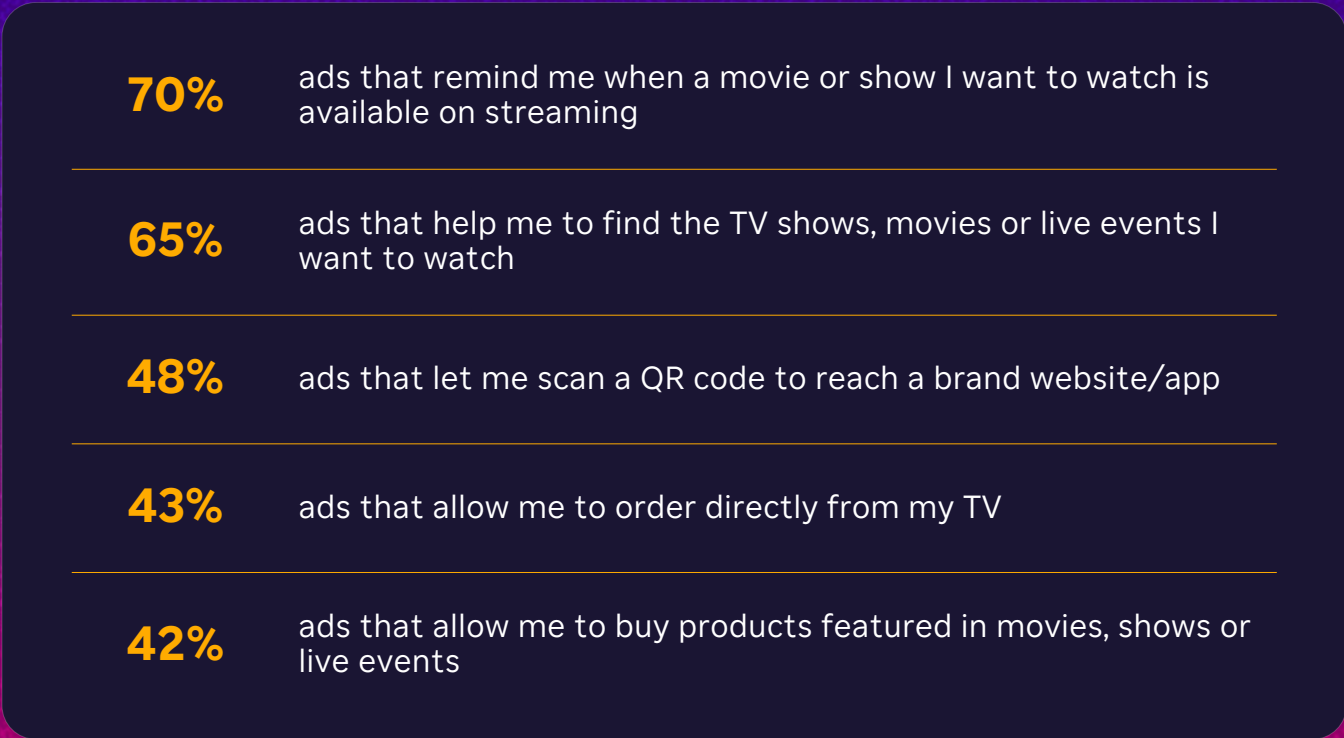


Streamers have an appetite for helpful ads

Our research suggests there is an appetite for ads that can help streamers find new things to watch, and provide a quick route to the TV shows, movies, or sports events they’re interested in.

We asked streamers what kind of helpful ads they’d like to see. 7 out of 10 said they’d find reminder ads – which would alert them when a movie or show they want to watch is starting – useful, while a similar proportion (65%) said the same for ads that help them find the shows, movies or live events they want to watch.

How useful would you or do you find each of the following types of ad?
Percentage of streamers who agreed



Streamers appreciate ads that let them take immediate action – about half (48%) find (or would find) ads with QR codes useful, and 43% say the same about ads that let them buy products featured in movies, shows, or live events, or to order them directly with the remote.

Such ads could run during contextually relevant events – e.g. a fast food restaurant could run an ad offering food delivery during the big game. Roku’s Action Ads are built for exactly this. A clickable overlay on a standard video ad lets streamers press OK on the remote to send an offer to their phone by SMS or email, scan a QR code, or download an app – without leaving the content they’re watching. Delivered against the right moment (food delivery during the big game), it is the shortest route from attention to action on the biggest screen in the house.

Ads can help streamers find the next thing to watch

Despite the rising popularity of FAST channels and the lean-back experiences they offer, streamers still appreciate choice and curated experiences. Brands can provide these experiences by sponsoring free movies or TV shows, or a curated selection of streaming content.

Our survey suggests streamers would like to see these suggestions for what to watch next, and many say that they would like brands more for saving them the 13-minute hunt for something to watch.

Many streamers would like a brand more if they help them find content to watch:



45%

of streamers said they would like a brand more if it sponsored a free movie or TV show



36%

of streamers said they would like a brand more if it sponsored a selection of TV shows and movies to help them find something to watch

On Roku, brands can sponsor a curated destination of free movies and shows on the Home Screen, discoverable by every streamer in the household. These sponsorships work hardest at the moments that matter, when families stream together — the holidays, New Year, Halloween, the Stanley Cup, and the Super Bowl — when a brand can attach itself to a selection of content built for the occasion. Streamers are also more likely to agree than disagree that a Home Screen ad feels less intrusive than standard TV ads.



Key takeaways for 2027

1 **Brands can reach 23 million Canadians with in-stream ads.**

Of the 31 million online Canadian adults watching TV, 74% watch ad-supported streaming services at least one a month.

2 **Streamers are watching more ‘linear’ content, including live TV, FAST channels, and sports, through streaming platforms.**

44% watch cable channels through streaming services, suggesting streaming provides a satisfying replacement for cable. The most popular genres to stream among linear streamers are movies, sports, comedy, crime, and news. With streamers spread across an average of 3.6 services, aggregated streaming networks such as Roku Publisher Media put ads across premium channel apps and FAST channels in a single buy, easing the fragmentation problem for marketers.

3 **Many streamers would like to see ads that help them find something to watch.**

Deciding what to watch next is still a problem for streamers. There is an appetite for ads that are helpful and interactive, for example, ads that remind them when a show they’re interested in is about to start.

4 **Sports fans want to see all sports content in the same place.**

Two-thirds (64%) of streamers are sports fans, but finding streaming matches or highlights can prove difficult. Two-thirds (64%) of streaming sports fans would find it helpful to have a dedicated sports zone on the TV Home Screen, while about half would like a brand more if it sponsored a sports zone. Roku launched Soccer Zone in Canada in June 2026 – Hockey Zone and F1 Zone will follow in early 2027.

5 **The Home Screen can be a hub for content discovery and audience engagement.**

Every streaming journey starts at the Home Screen. This makes it a great place to offer streamers a way to navigate all the choices their streaming platforms offer, such as curated lists of new shows or movies, or dedicated zones that aggregate all their favourite sports content. New ad placements, which allow brands to sponsor content, playlists, or dedicated zones, would be received favourably by streamers. On Roku, Native Ads and Destinations place brands on the Home Hcreen where every streaming journey begins, and Action Ads let viewers respond with a press of the remote — brand-building and performance in the same environment.

Glossary



Methodology



About Roku



Glossary

Established TV Services

Cable	—	Cable and satellite TV services
OTA	Over the Air	Over the air aerial

Video on Demand (VOD) • TV Streaming Services

SVOD	Subscription	Any paid-for subscription streaming TV service(s) with no ads (e.g. Netflix, Disney+, Crave, DAZN)
BVOD	Broadcast	Any TV broadcaster’s streaming TV service (e.g. CBC Gem, CTV app, the Global TV app)
AVOD	Ad-Supported	Any other free or ad-supported streaming TV service (e.g. Roku Channel, Tubi, Kanopy)
ADSVOD	Ad-Supported SVOD	Any lower cost ad-supported paid-for subscription streaming TV service (e.g., Netflix with ads, Disney+ Basic)
LVOD	Language	Any foreign-language or international free or paid streaming TV service (e.g. Britbox, Hotstar, Viki, Malimar, Panjere)
TVOD	Transactional	Any one-off pay-per-view events you paid to stream (e.g. UFC or wrestling pay-per-view fights, IPL pay-per-view matches)
MVOD	Music	Any audio music streaming service (e.g. Spotify, Apple Music) accessed through your TV set
SeasonalVOD	Season Pass Subs (i.e. Sports)	Any season-long streaming subscription for live events (e.g. season subscription to the Blue Jays on MLB.tv)
TV Streamer	TV Streamer	Any watched in the last month: SVOD, ADSVOD, BVOD or AVOD services
Ad-Supported TV Streamer	Ad-Supported TV Streamer	Any watched in the last month: ADSVOD, BVOD or AVOD services
FAST	Free Ad-Supported Streaming TV	Free ad-supported TV channels that mimic live linear TV experiences with a curated schedule, delivered through TV streaming technologies. A growing subset of AVOD channels and services.

Other Video

OLV	Online Video	Any other online video platforms (e.g. YouTube, Tik Tok, Twitch) accessed on your TV set
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Methodology

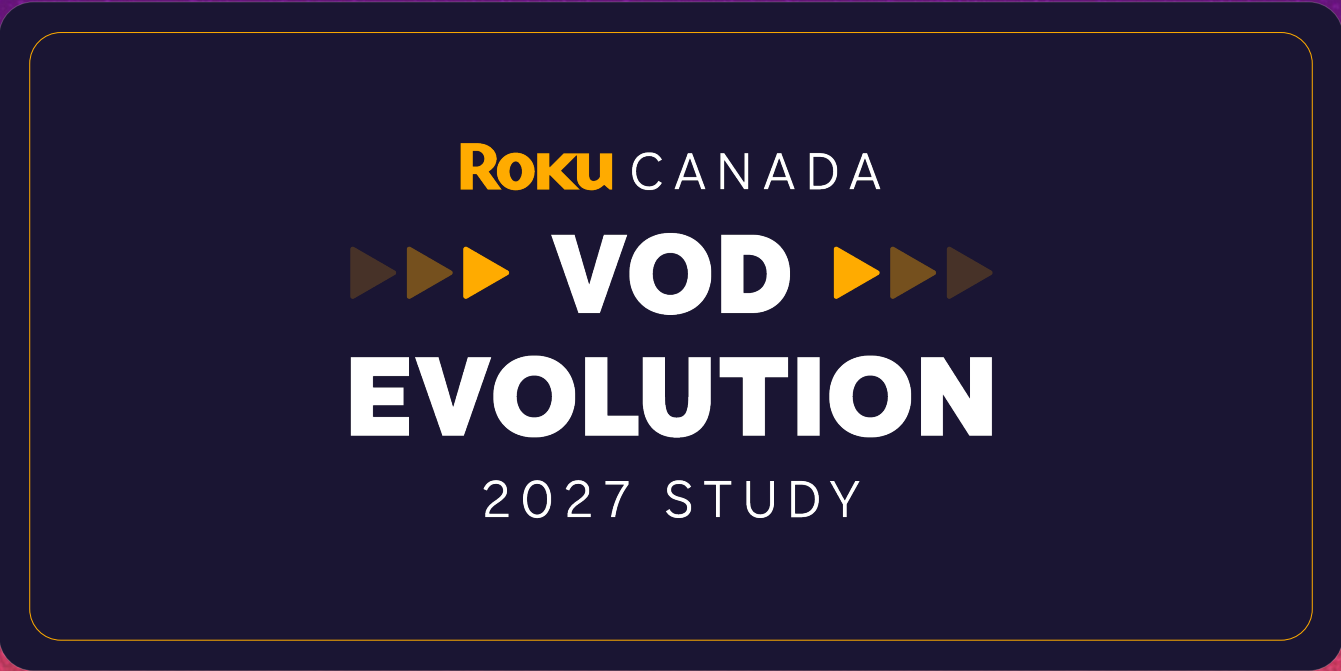
This is Roku’s seventh annual study of Canadians’ TV streaming habits. Like the studies from 2020–2026, this study is based on the results of an online survey of Canadian adults aged 18+ who use the internet and watched TV at least once in the last month.

The same vendor that ran the previous waves of research, Fuse Insights, was commissioned for this study. A total of 2,043 respondents completed the survey, and quotas used to ensure that they form a broadly nationally representative – by age, gender, and geography – sample of the population of Canadian TV viewers.

From that overall sample, a total of 1,798 respondents are TV streamers – viewers who have watched content on an SVOD, ADSVOD, BVOD or other AVOD platform in the past month – and 245 are non-TV streamers who have not watched content on any of those platforms in the last month.

Of these 1,798 TV streamers, 84% (1,521) are ad-supported TV streamers – that is, people who watch ad-supported streamed TV, containing in-stream video ads in an average month, whether that’s AVOD, BVOD or an SVOD “with ads” plan (ADSVOD).

Fieldwork took place in June and July 2026 and year-on-year comparisons of the data are included where relevant.



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About Roku

Roku pioneered streaming on TV. We connect users to the content they love, enable content publishers to build and monetize large audiences, and provide advertisers with unique capabilities to engage consumers. Roku-made TVs, Roku TV™ models, Roku streaming players, and TV-related audio devices are available in various countries around the world through direct retail sales and/or licensing arrangements with TV OEM brands. Roku Smart Home products are sold exclusively in the United States.

Roku also operates Roku Channel, the home of free and premium entertainment with exclusive access to Roku Originals, and the #2 app on our platform in the U.S. by streaming hours. Roku Channel is available in the United States, Canada, Mexico, and the United Kingdom. Roku is headquartered in San Jose, Calif., U.S.A.



#1
TV Streaming Platform in Canada¹



Streaming Stick



Streaming Stick Plus



Streaming Stick 4K



Ultra

Hisense

onn.

MAGNAVOX

Westinghouse

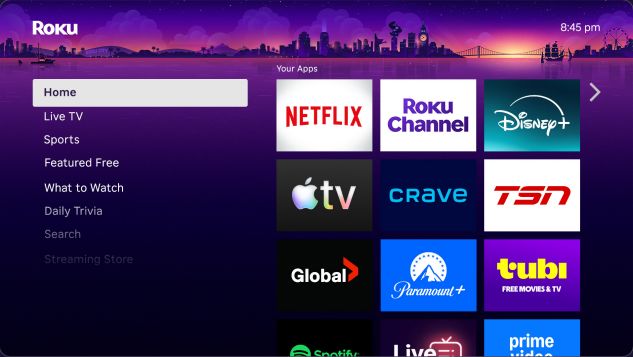
JVC

PHILIPS

TCL

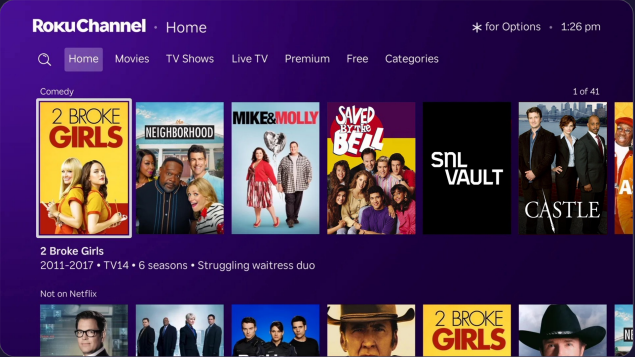


Roku Publisher Media



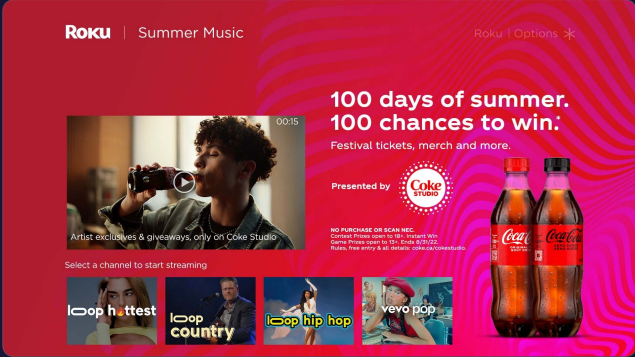
Buy video ads across 25+ top premium channel apps and 200+ FAST channels, including French-language — all in one buy. Targeting options and programmatic access available.

RokuChannel



Roku's own ad-supported channel with thousands of hit Hollywood movies, exclusive Roku Originals, shows, new, live FAST channels and more.

Native Ads and Destinations



Creative experiences beyond the 30s video spot through native display units and content sponsorships, reaching all Roku streamers on the Home Screen.

Action Ads



Bring consumers further down the funnel, as streamers can engage with ads by simply pressing OK on their remote. Brands can overlay offers on video ads including QR codes and SMS messaging.

High-impact 15s and 30s video ads, including ACR targeting capabilities

Brand storytelling for TV streaming

Forward-Looking Statements

Roku Canada, VOD Evolution 2027 Edition
Base: All TV streamers / non-TV streamers (1,798/245)
Base Total: 2,043 respondents

Roku Canada, VOD Evolution 2027 Edition Base: All TV streamers / non-TV streamers (1,798/245) Base Total: 2,043 respondents. This white paper (“White Paper”) is for informational purposes only. Certain statements included in this White Paper that are not historical facts are forward-looking statements for purposes of the safe harbor provisions under the United States Private Securities Litigation Reform Act of 1995. Forward-looking statements generally are accompanied by words such as “believe,” “may,” “will,” “estimate,” “continue,” “anticipate,” “intend,” “expect,” “should,” “would,” “plan,” “predict,” “potential,” “seem,” “seek,” “future,” “outlook,” and similar expressions that predict or indicate future events or trends or that are not statements of historical matters. These forward-looking statements include, but are not limited to, statements regarding the growth and adoption of TV streaming and the global trend towards streaming, including trends towards streaming among Canadians, trends regarding consumer preferences and habits, the re-organizing of content producers around streaming, the addition of content to Roku’s platform, the rise in popularity of smart TVs and streaming devices, benefits, impact, features and availability of advertising tools, analytics and solutions, consumer preferences for advertising types, the growth of ad-supported video-on-demand, the market reach of streaming and Roku’s overall business trajectory. These statements are based on various assumptions, whether or not identified in this White Paper, and on the current expectations of the management of Roku and are not predictions of actual performance. These forward-looking statements are provided for illustrative purposes only and are not intended to serve as and must not be relied on by an investor as, a guarantee, an assurance, a prediction, or a definitive statement of fact or probability. Actual events and circumstances are difficult or impossible to predict and will differ from assumptions. Many actual events and circumstances are beyond the control of Roku. These forward-looking statements are subject to a number of risks and uncertainties, including changes in domestic and foreign business, market, financial, political, and legal conditions; the effects of competition on Roku’s business; and those factors discussed in Roku’s Annual Report on Form 10-K for the year ended December 31, 2025 and Quarterly Report on Form 10-Q for the quarter ended June 30, 2026 under the heading “Risk Factors,” and other documents Roku has filed, or will file, with the Securities and Exchange Commission, each of which are posted on Roku’s website and are available from Roku without charge. If any of these risks materialize or Roku’s assumptions prove incorrect, actual results could differ materially from the results implied by these forward-looking statements. There may be additional risks that Roku does not presently know, or that Roku does not currently believe are immaterial, that could also cause actual results to differ from those contained in the forward-looking statements. In addition, forward-looking statements reflect Roku’s expectations, plans, or forecasts of future events and views as of the date of this White Paper. Roku anticipates that subsequent events and developments will cause Roku’s assessments to change. However, while Roku may elect to update these forward-looking statements at some point in the future, Roku specifically disclaims any obligation to do so. These forward-looking statements should not be relied upon as representing Roku’s assessments of any date subsequent to the date of this White Paper. Accordingly, undue reliance should not be placed upon the forward-looking statements. Roku specifically disclaims any obligation to do so.

Whitepaper Credits
Roku Marketing: Belinda Baugniet, Hoda Menshari
Roku Design: Craig Tscherednikov, Marcela Gomez
External: Leonie Mercedes, Fuse Insights, DataTile



Roku CANADA

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EVOLUTION

2027 STUDY

For more information, or to request a training session for your team,
contact us at advertising.roku.com or admarketingCA@roku.com