

# FULL STREAM AHEAD



**AN IN-DEPTH LOOK AT  
THE RISE OF STREAMING IN CANADA**

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# INTRODUCTION

Over the past two years, Canadians have embraced streaming in unprecedented numbers.

While 'traditional' television is still a significant method of consumption, long-form video content streamed through a connected device is a regular part of Canadian viewing patterns. In some cases, viewing through a connected device is the only way Canadians are consuming content.

Whether ad supported (YouTube, CityTVNow, Tubi), paid subscription (Netflix, Disney+, Sportsnet NOW etc.) or a hybrid of both, streaming is a growing method of content consumption in Canada.

According to data from Convergence Research released prior to the COVID-19 pandemic, Canadians were expected to spend \$2 billion on subscription video on-demand services (SVODs) in 2020.<sup>2</sup> With enforced isolation and restrictions brought on by the pandemic, that spending leapt to \$2.7B, 33% above expectations.<sup>1</sup> Is that figure a one time aberration, or a sign of things to come?

Now, as we enter what appears to be the final phase of the COVID-19 pandemic, this report takes a look at the state of Streaming in Canada: What streaming content are Canadians consuming, and how these changes affect advertisers, agencies, content creators and distributors, as they look to forge ahead in a post-COVID landscape.



## Methodology

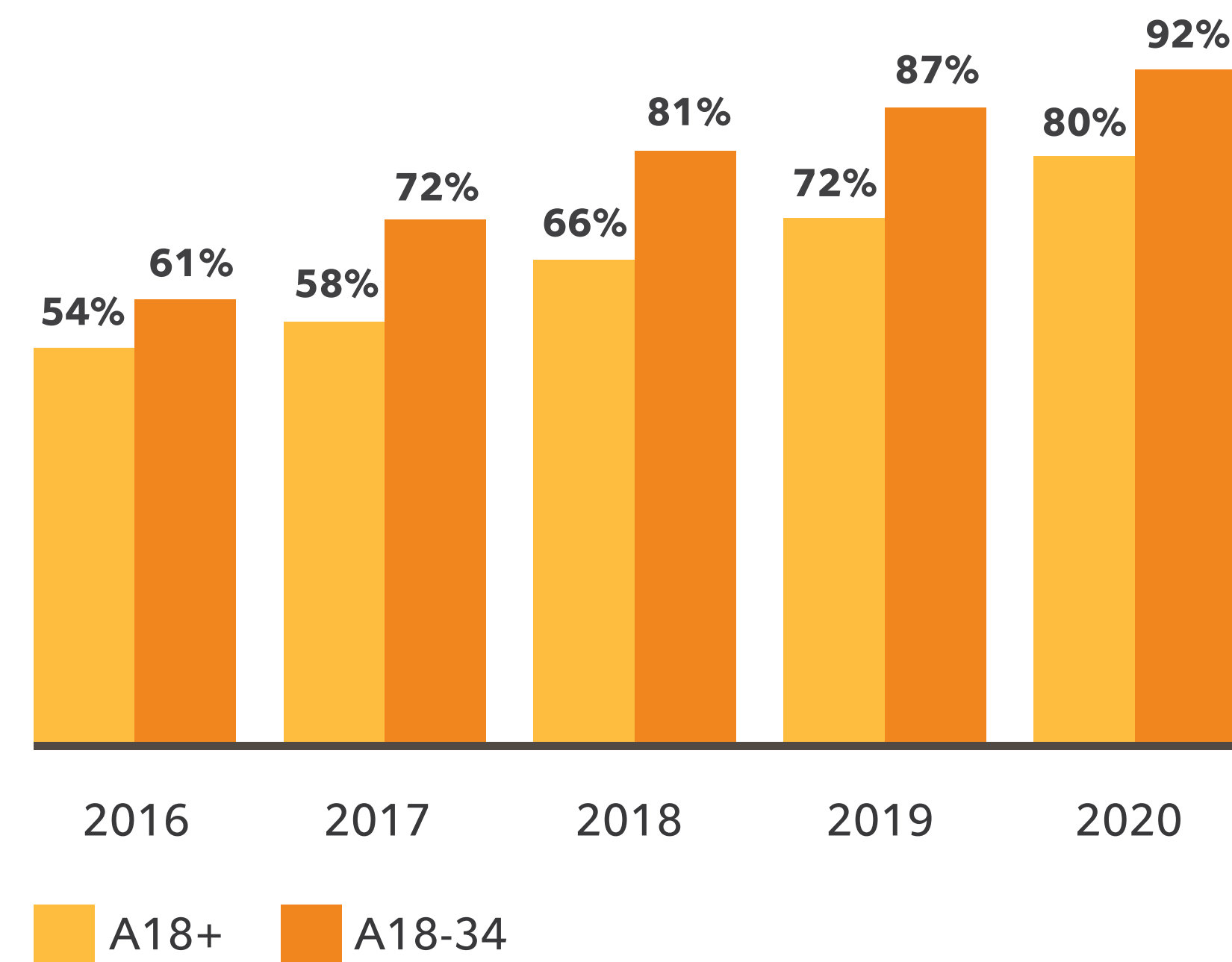
Rogers Sports & Media (RSM) in partnership with Tubi commissioned this study through MARU/Matchbox using their Voice Canada panel. It was an online survey conducted April 16-19th, 2021 to a sample size of n=2150. The sample was representative of the Canadian population of A18+.

To further explore streaming audience behaviour, Tubi and RSM analyzed first party and third party data sources, which are also included in this report.

# A LOOK AT CANADIAN STREAMERS

As of Fall 2020, **80% of Canadians have SVOD** (subscribed and are paying for a streaming service), up 21% from 2018.<sup>2</sup> That % increases among younger demographics.

## GROWTH OF CANADIAN STREAMERS



Source: MTM SVOD Services Report - April 2021

	CDN STREAMERS	CDN POPULATION
18-24	7%	7%
25-34	27%	23%
35-44	16%	14%
45-54	15%	21%
55-64	13%	13%
65+	16%	22%
Male	50%	49%
Female	50%	51%
Have Kids	33%	29%
Single	44%	41%
Married/Relationship	55%	59%
Full-Time Employed	52%	47%
HHI Less Than \$50K	22%	25%
HHI \$50K-74.9K	18%	18%
HHI \$75K-99.9K	17%	16%
HHI \$100K-124.9K	11%	11%
HHI \$125K+	20%	18%
University Degree	49%	47%

Source: Rogers Sports & Media Canadian Streaming Study April 2021

To put this into context, while 75% of people without SVOD have a TV/cable subscription,<sup>2</sup> **62% of Canadians who stream also have a TV/cable subscription.**<sup>1</sup>

## GLOSSARY OF TERMS

### Over-the-Top (OTT)

Television content that is streamed over the Internet to a connected device and can be viewed on multiple screen sizes from mobile phones to TVs. Connected devices include personal computers, laptops, tablets, mobile devices, digital media players / streaming devices (Apple TV, Fire TV, Roku) and gaming consoles (PS4).

### Connected TVs (CTVs)

Television content that is streamed over the Internet to a connected device and is viewed on a television set.

### SVOD

Subscription based video on demand services where consumers pay for content with no advertising. (ex. Netflix, Amazon and Disney+).

### AVOD

Advertising supported video on demand services that are free to consumers. (ex. Tubi, CityTvNow, CBC Gem).

### Rogers Ignite

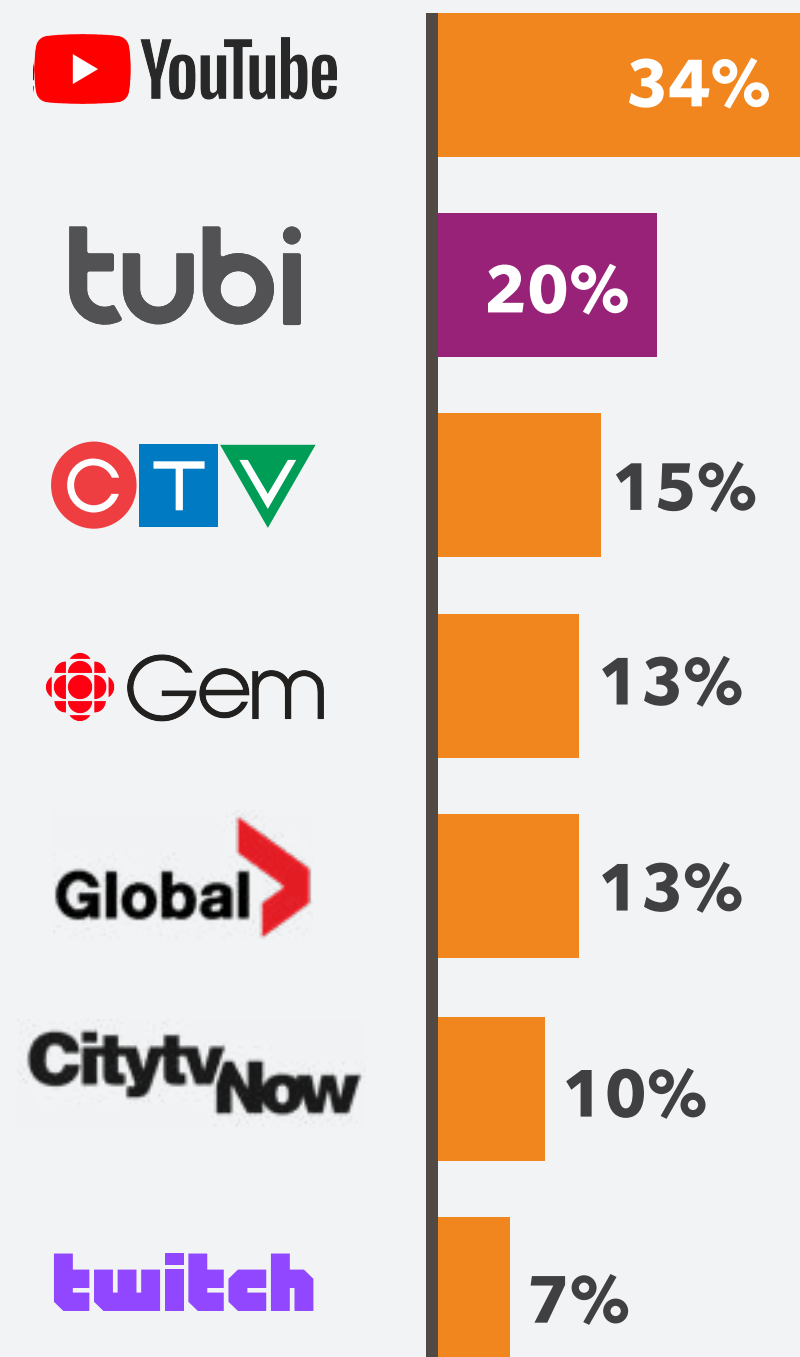
Rogers Sports & Media IPTV service.

### RSM Streaming

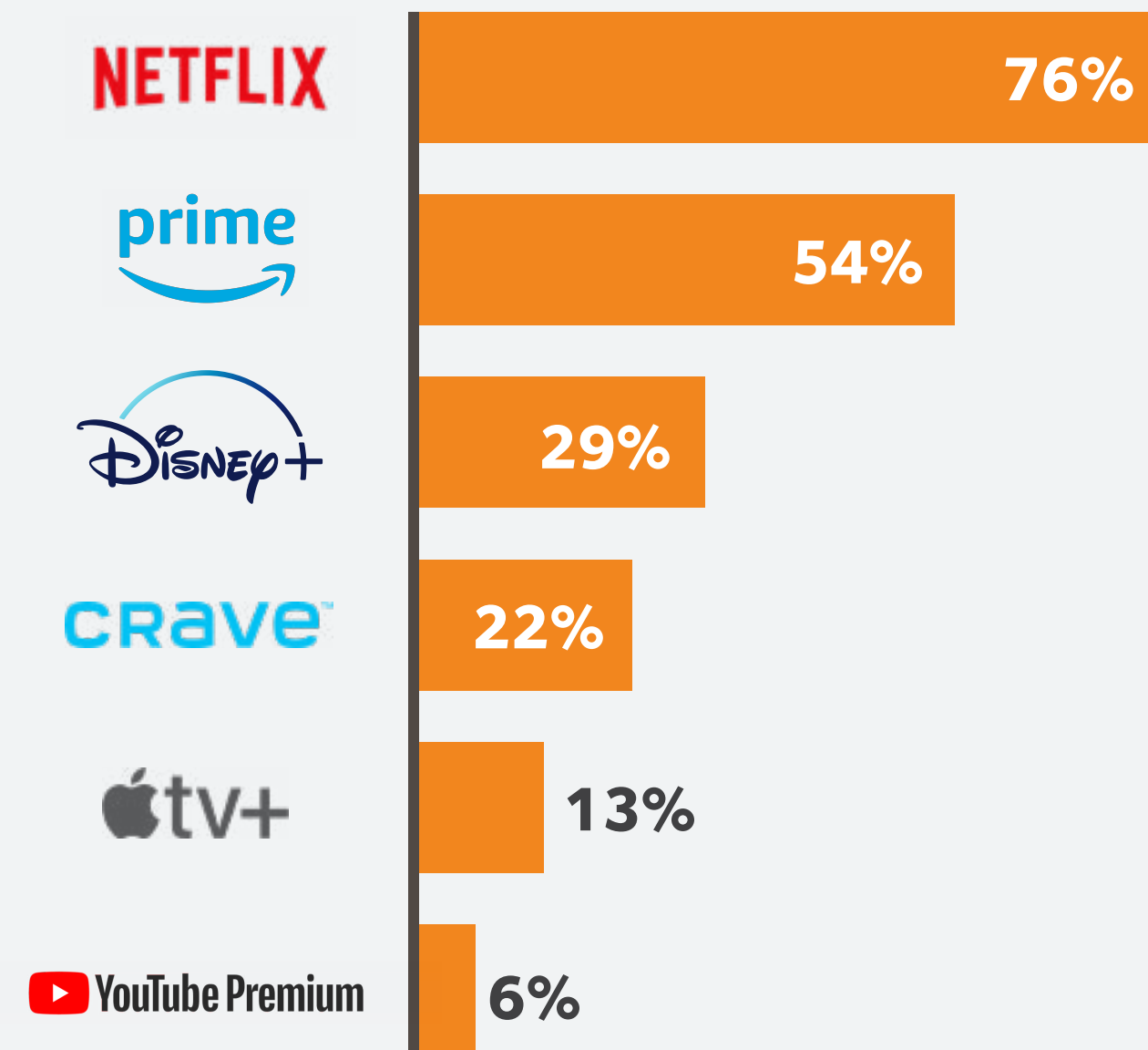
Includes all Rogers Sports & Media streaming properties. (CityTvNow, FXNOW, SN NOW, NHL LIVE, Tubi).

On average, Canadian streamers subscribe to **2.2 SVOD services**, and consume on average **3.2 hours** of streaming content every day.<sup>1</sup>

**MOST POPULAR AVOD**

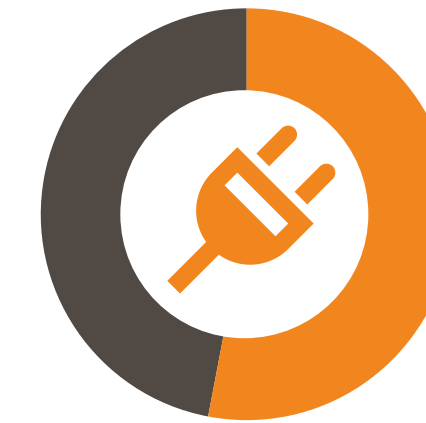


**MOST POPULAR SVOD**



Source: Rogers Sports & Media Canadian Streaming Study April 2021

While TV/cable subscriptions remain a vital part of viewing habits, there is **a shift in those habits among younger streamers**, who are less likely to have grown up with cable.



**53%**  
OF A18-24 HAVE NEVER HAD  
A CABLE SUBSCRIPTION<sup>1</sup>



**38%**  
OF STREAMERS HAVE  
NO TV SUBSCRIPTION<sup>1</sup>

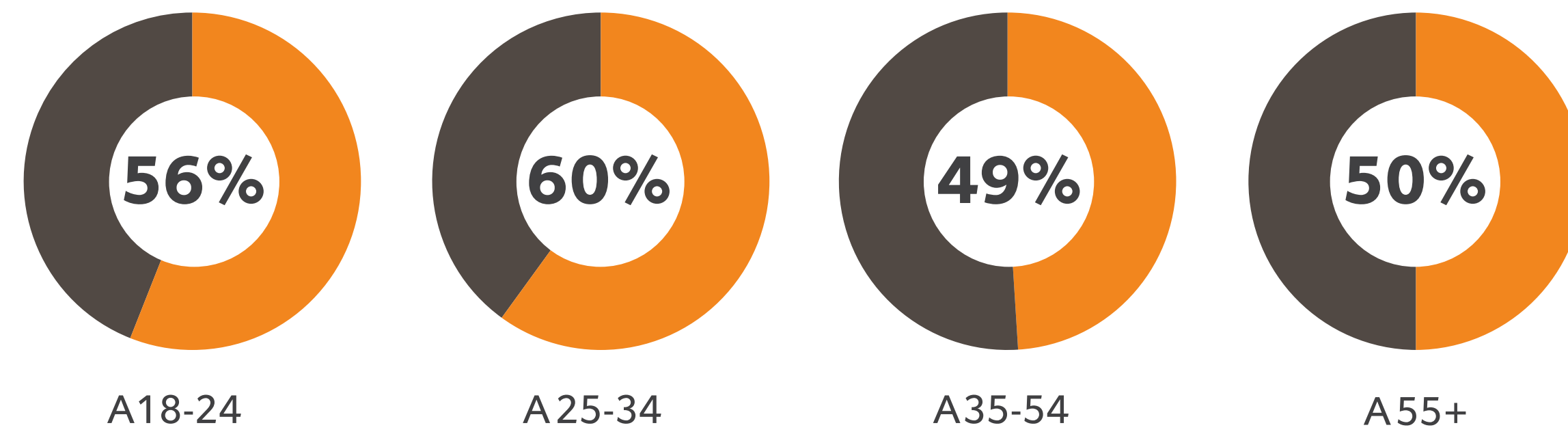


**15%**  
OF NON-TV SUBSCRIBERS  
HAVE NEVER HAD A TV  
SUBSCRIPTION (5.7% OF CANADIANS)<sup>1</sup>



# EXPLORING THE RAPID RISE OF STREAMING IN CANADA

As we've seen above, streaming content had been increasing prior to the pandemic, but 2020 saw a significant acceleration of that trend: **54% of Canadians say their streaming viewing has increased over the past year**, with A18-34 citing the most significant change.<sup>1</sup>

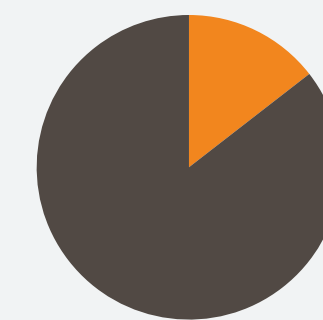


Source: Rogers Sports & Media Canadian Streaming Study April 2021



Canadian streamers say their daily consumption of streamed content has **increased on average by 2.4 hours per day**, with AVOD (free) streamers consuming an additional 30 minutes more per day than SVOD (paid) streamers.<sup>1</sup>

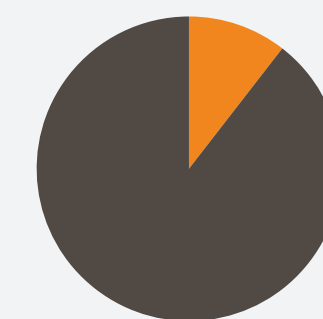
**These figures increase significantly with younger demographics.**



**A18-34 SPEND**

**3.5** HOURS/DAY STREAMING

**44%** SUBSCRIBE TO 4+ SVOD SERVICES



**35+ SPEND**

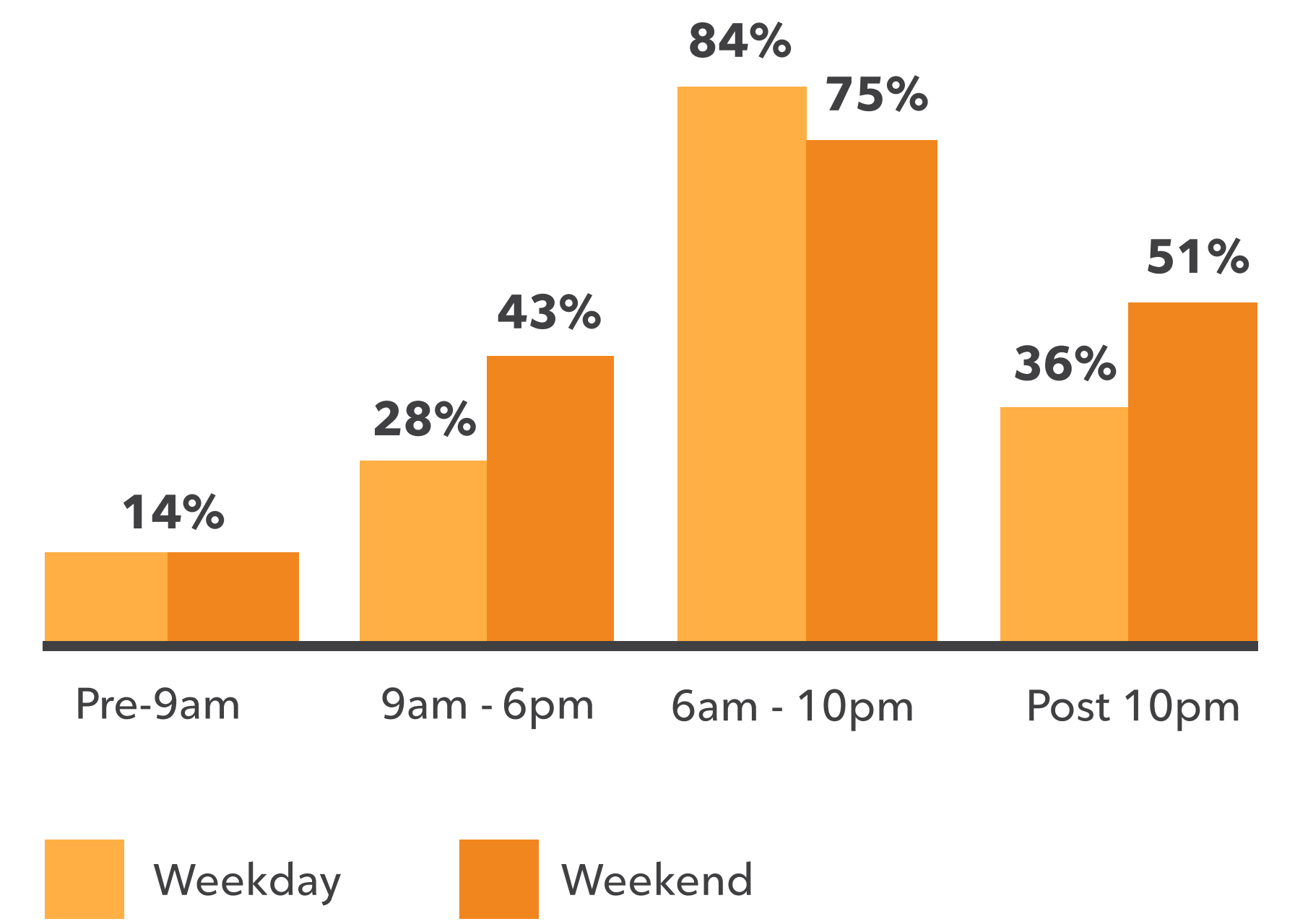
**2.6** HOURS/DAY STREAMING

**27%** SUBSCRIBE TO 4+ SVOD SERVICES



While Canadians may be streaming more than ever before, their viewing habits have not changed significantly from more traditional models.

**Canadians still stream more in the evening, and on weekends.** However, with pandemic restrictions and Canadians now available more hours in the day, that viewing is now spread through the daytime and late-night viewing.<sup>1</sup>

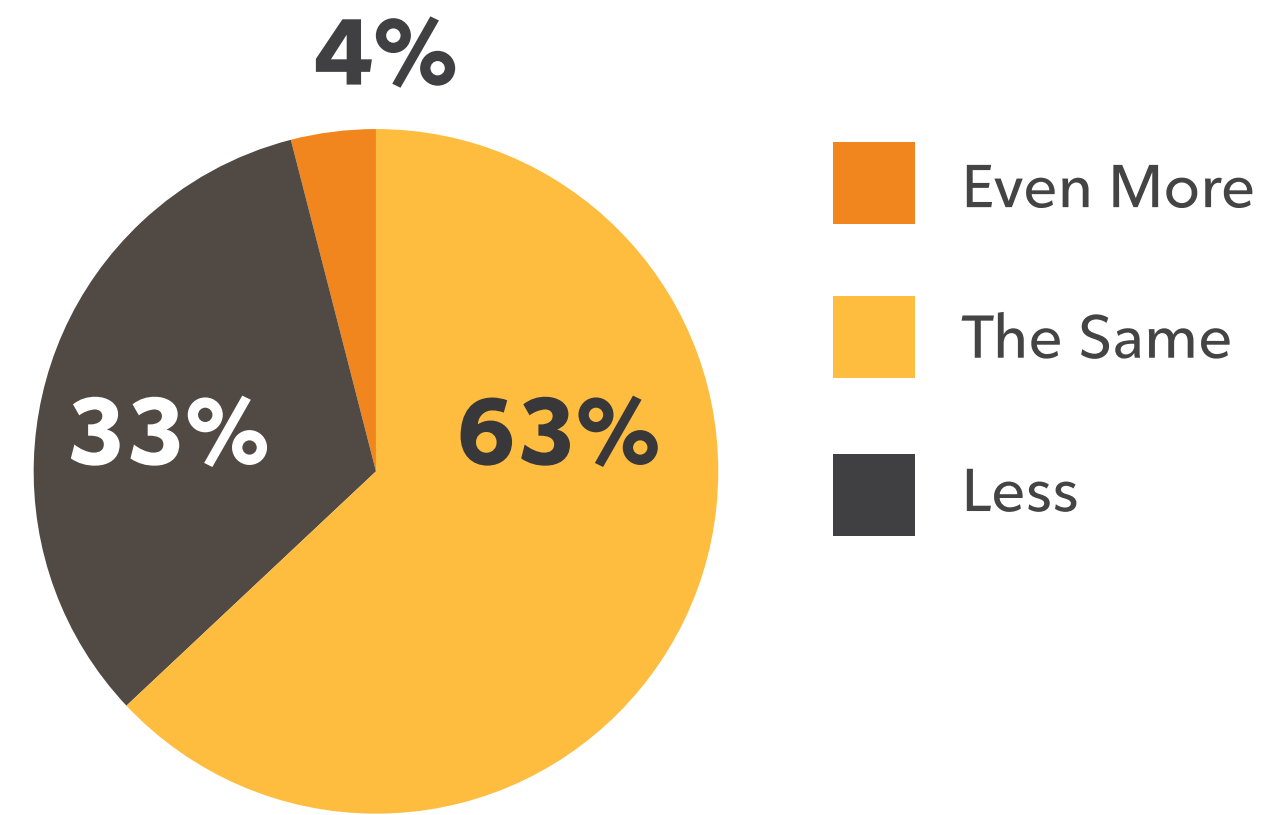


Source: Rogers Sports & Media Canadian Streaming Study April 2021

Overall, this behavioural change will have a lasting affect. **Two out of three** Canadians who stream content say their consumption will not decrease once pandemic restrictions loosen.<sup>1</sup>

### EXPECTED STREAMING CONSUMPTION POST-PANDEMIC

Source: Rogers Sports & Media Canadian Streaming Study April 2021

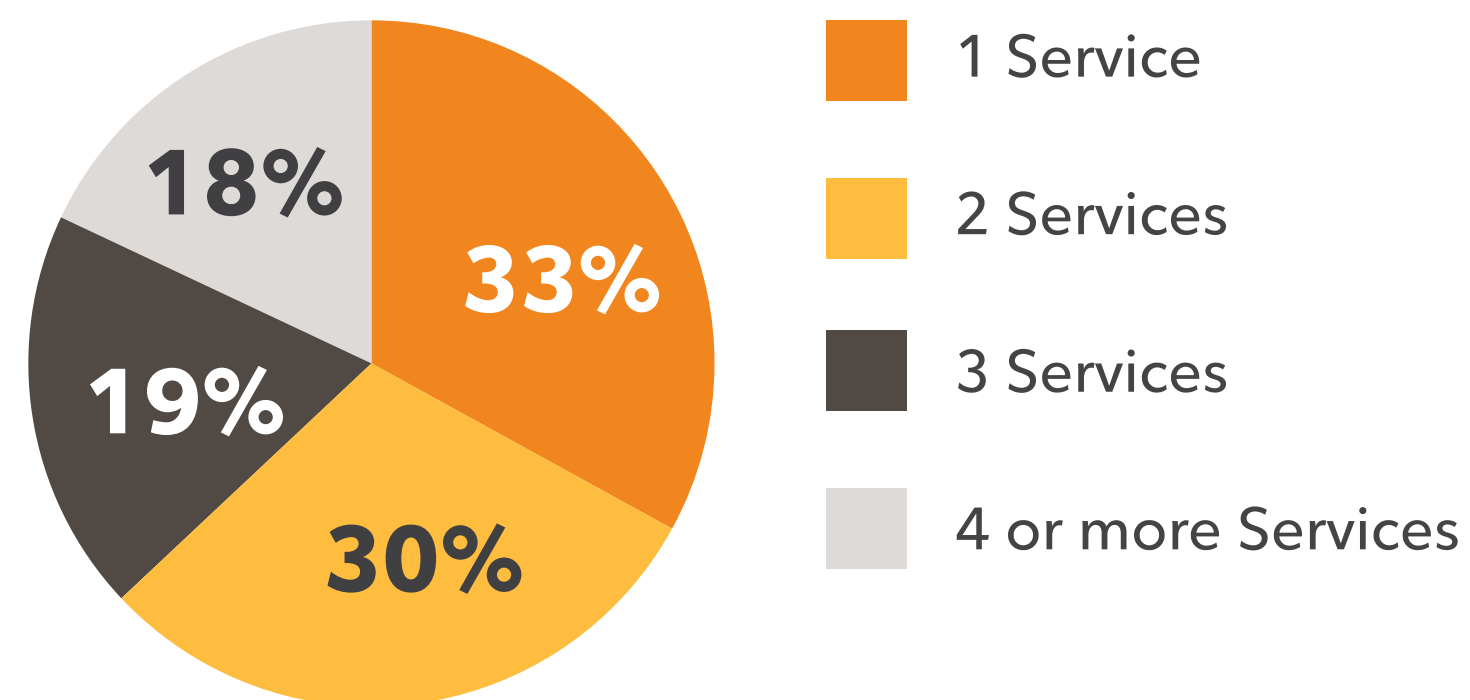


### It should be noted that there is a plateau for SVOD streaming.

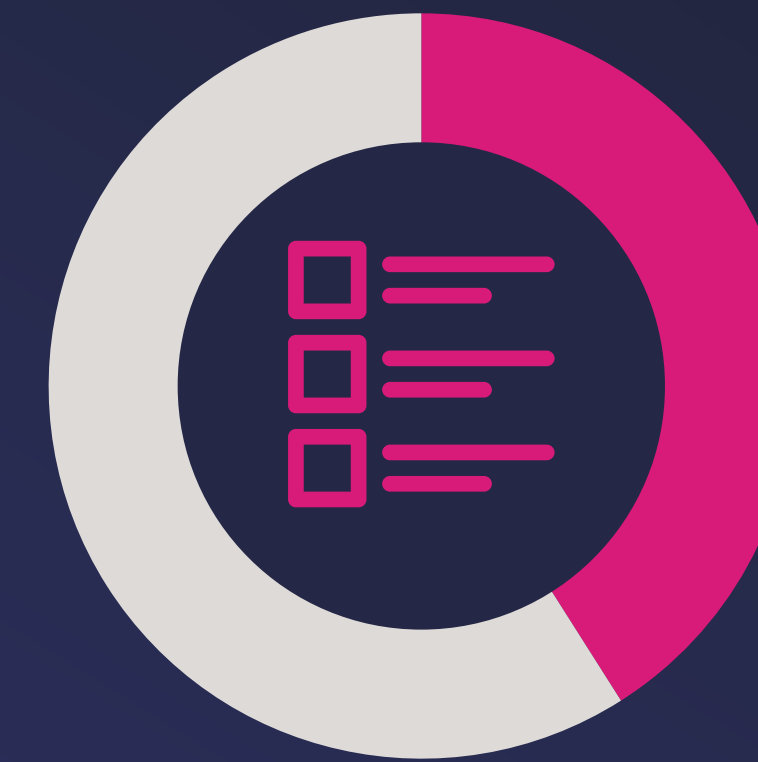
In total, 37% of Canadians who pay for streaming content have three or more services.<sup>1</sup> However, at that third service mark, streamers hit subscription fatigue, and are more likely to supplement their viewing by streaming for free with ad-supported platforms.

### NUMBER OF PAID SUBSCRIBERS

Source: Rogers Sports & Media Canadian Streaming Study April 2021



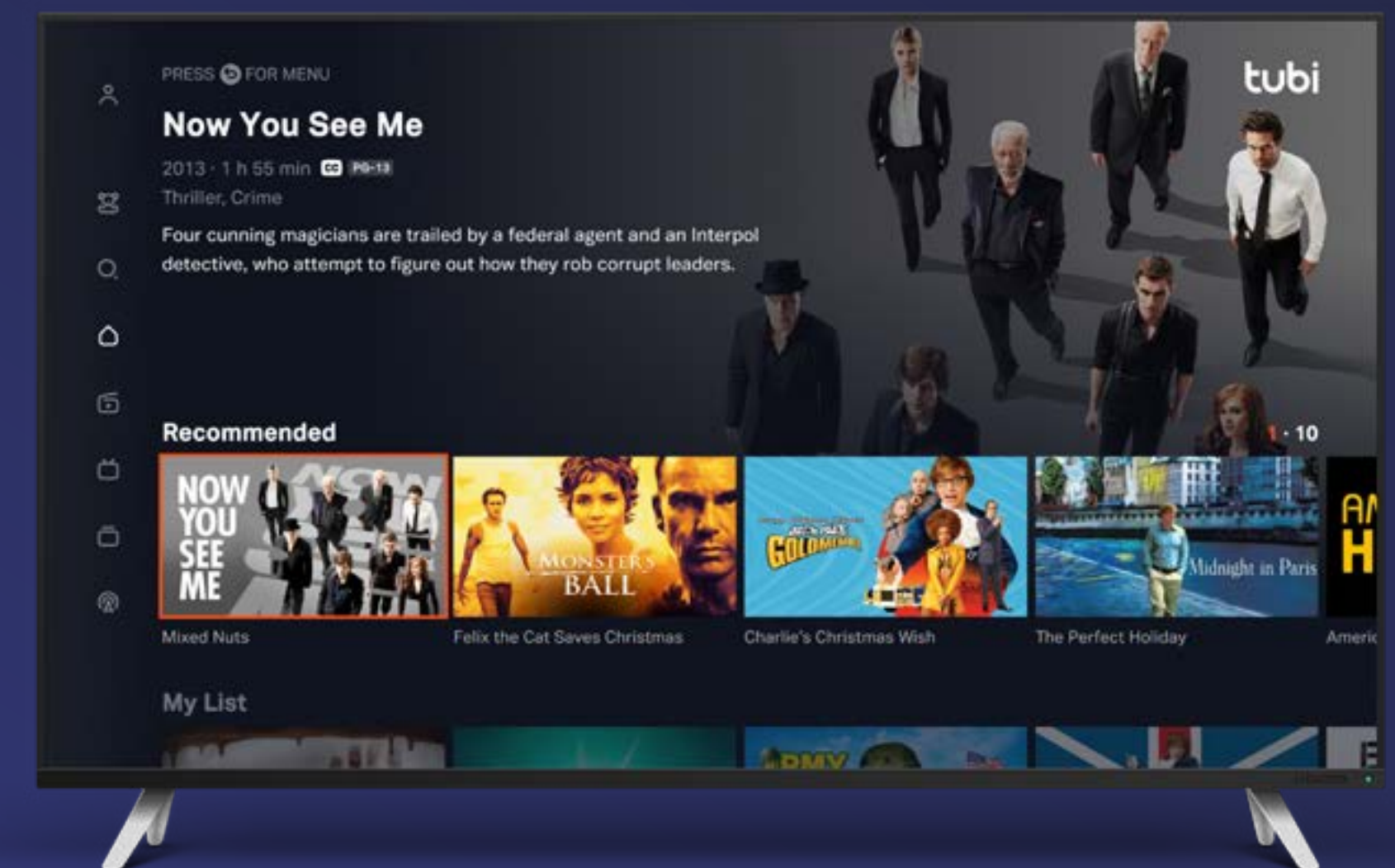
Another reason SVOD streamers seek other options is the amount of content available.



**41%**

of 3+ SVOD subscribers agree they are running out of content to watch. This is **21% higher** than those with two or less SVOD services.<sup>1</sup>

This “**content gap**” represents an opportunity for advertisers to incorporate free services like Tubi, **which offers 100% free content with lighter ad loads** when compared to linear TV.

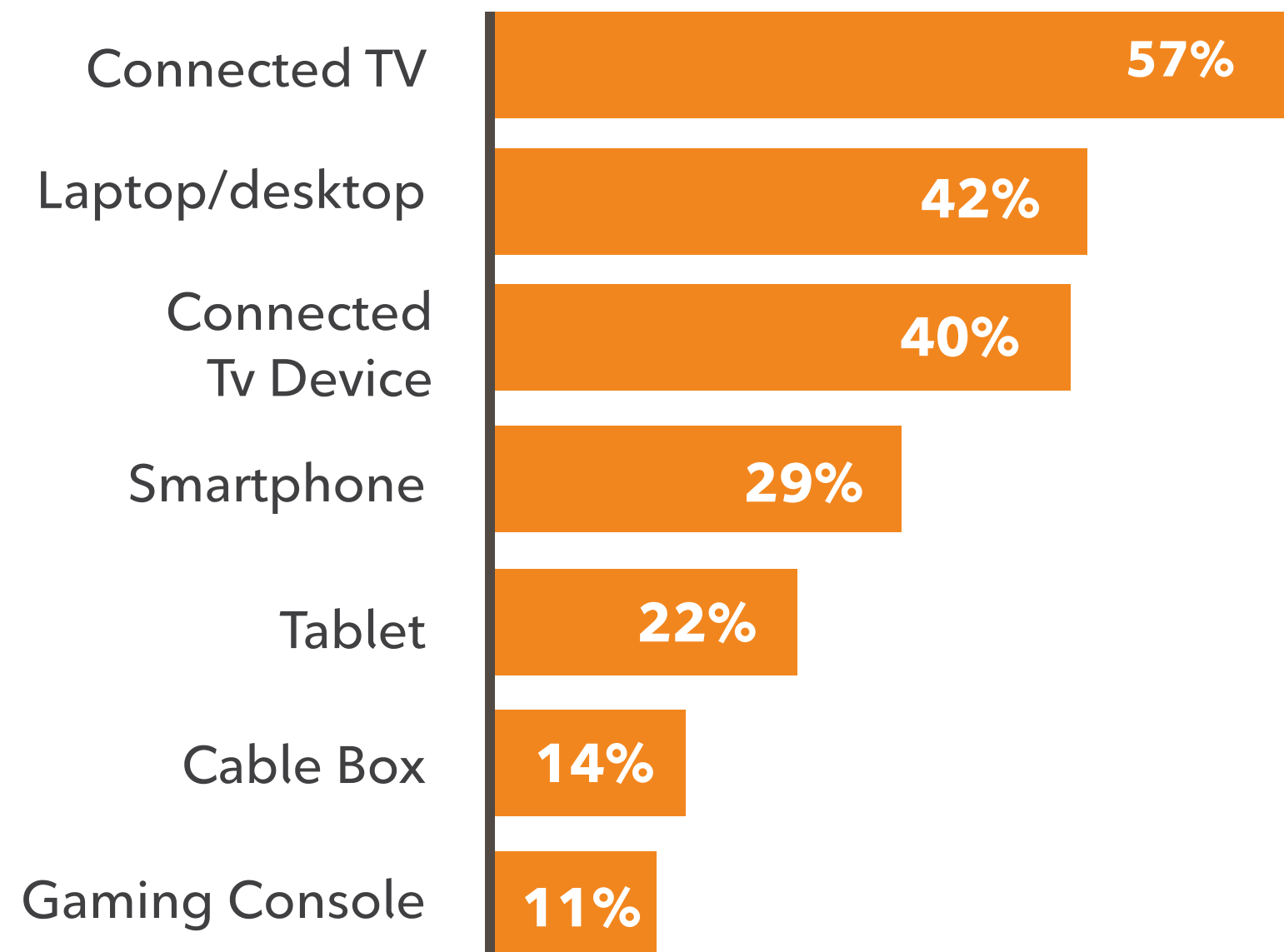




# CONSUMPTION PLATFORMS: CONNECTED TV IS NOW #1

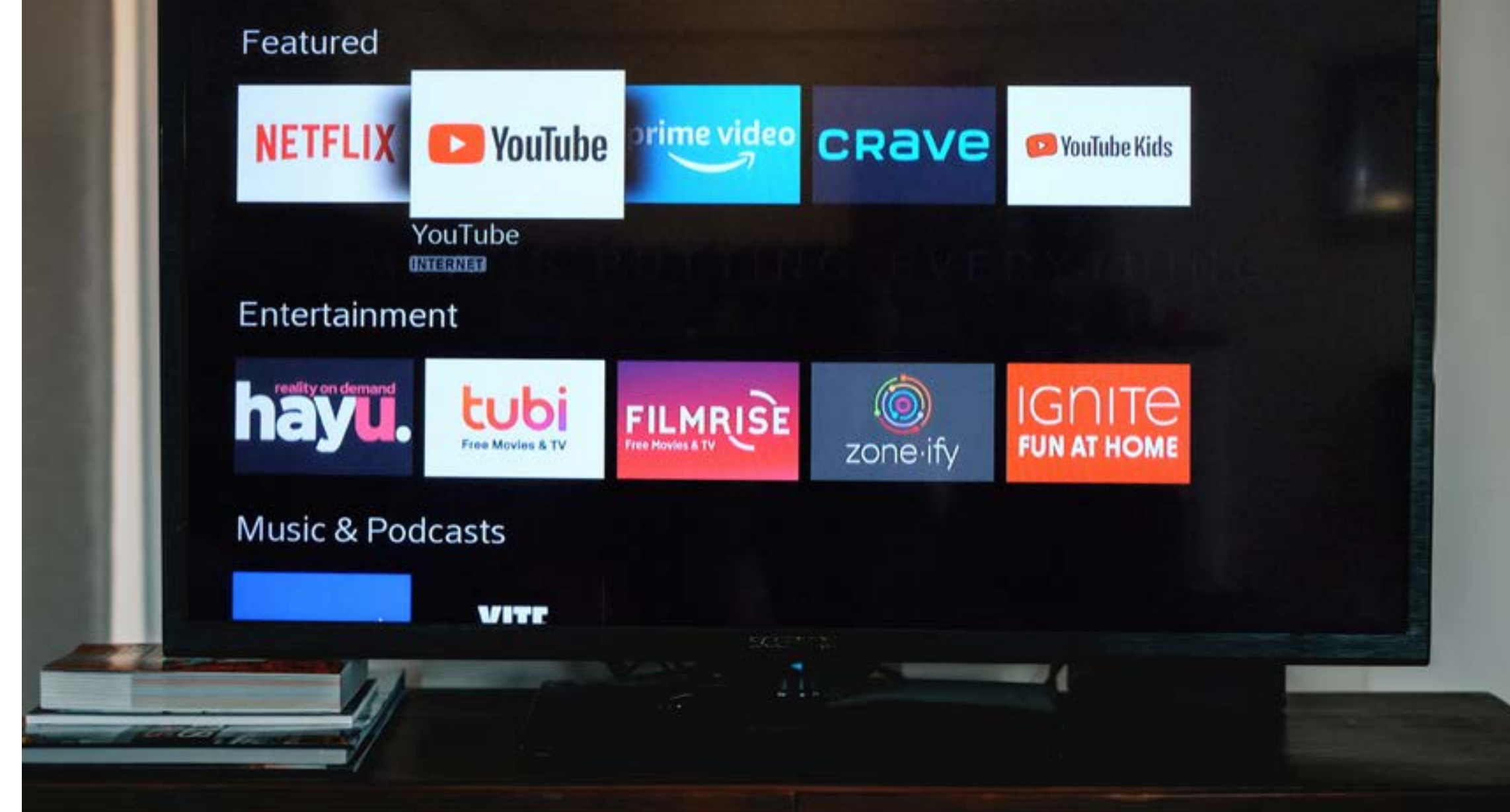
Content can be streamed anywhere on any device. However, Canadians prefer streaming content through the big screen on Connected TVs (CTVs). **Nearly three out of four (72%) Canadian households have a Connected TV.**<sup>2</sup>

## PREFERRED STREAMING DEVICE



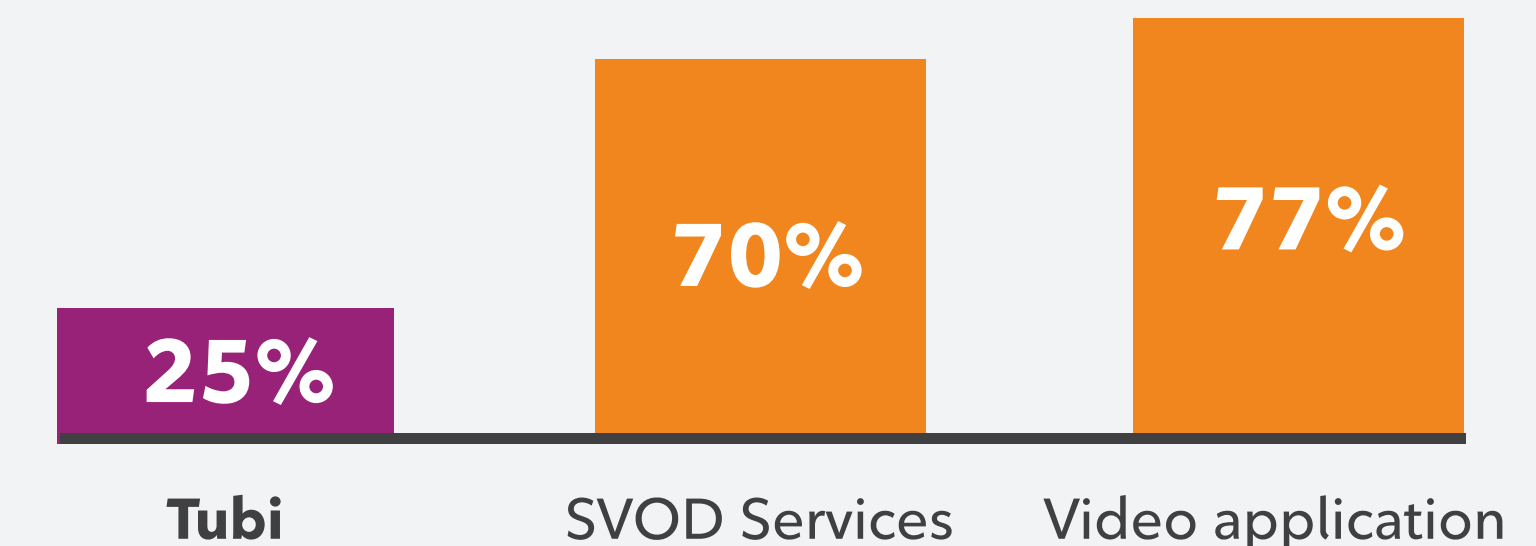
Source: Rogers Sports & Media Canadian Streaming Study April 2021

This shift is likely due to a desire to upgrade the home experience during enforced isolation. Connected TVs are expected to be the preferred method for entertainment for the foreseeable future.



On **Rogers Ignite**, we're seeing significant growth in Canadians accessing streaming services through their Set Top Box on a monthly basis:

## MONTHLY STREAMING USAGE THROUGH SET-TOP BOX



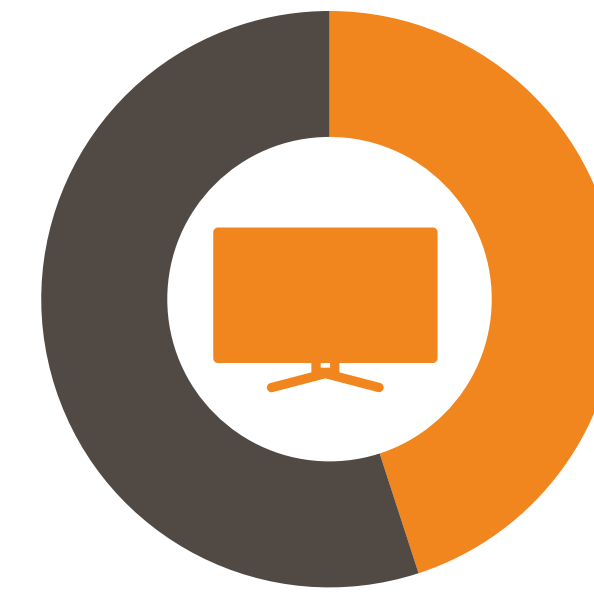
Source: Rogers Sports & Media Canadian Streaming Study April 2021

However, among streamers 18-34, streaming is more equally divided between CTVs, computers, smartphones, and tablets. This demographic continues to prefer flexibility, with the freedom to watch whatever, whenever, and wherever they want.

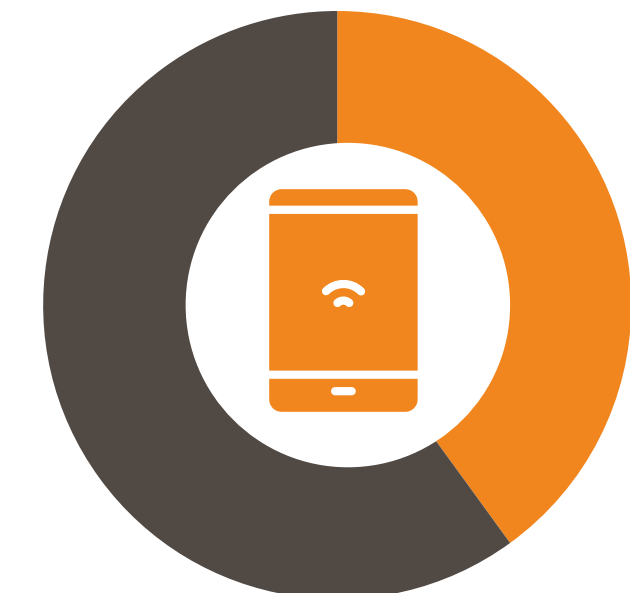


## VOD VS LIVE STREAMING TRENDS

In the US, while VOD represents the majority of ad impressions seen on digital devices (55%), live content viewership is growing.<sup>3</sup> In Q4 2020, ad impressions served to live audiences increased by 85% globally YoY.<sup>3</sup>



**45%**  
OF ADS IN LIVE  
CONTENT WERE ON  
**CONNECTED TVS<sup>3</sup>**



**40%**  
OF VOD AD CONTENT  
VIEWED ON  
**MOBILE DEVICES<sup>3</sup>**

At Rogers Sports & Media (RSM), we have seen the same trend: In 2020, live streaming on CityTvNow more than trippled to **29% of total video starts** from only 9% in 2019.<sup>4</sup>

# PAID VS. FREE PLATFORMS SVOD VS. AVOD STREAMERS

Up to this point we have treated SVOD (Subscription-based Video On Demand) and AVOD (Advertising-supported Video On Demand) streamers as one.

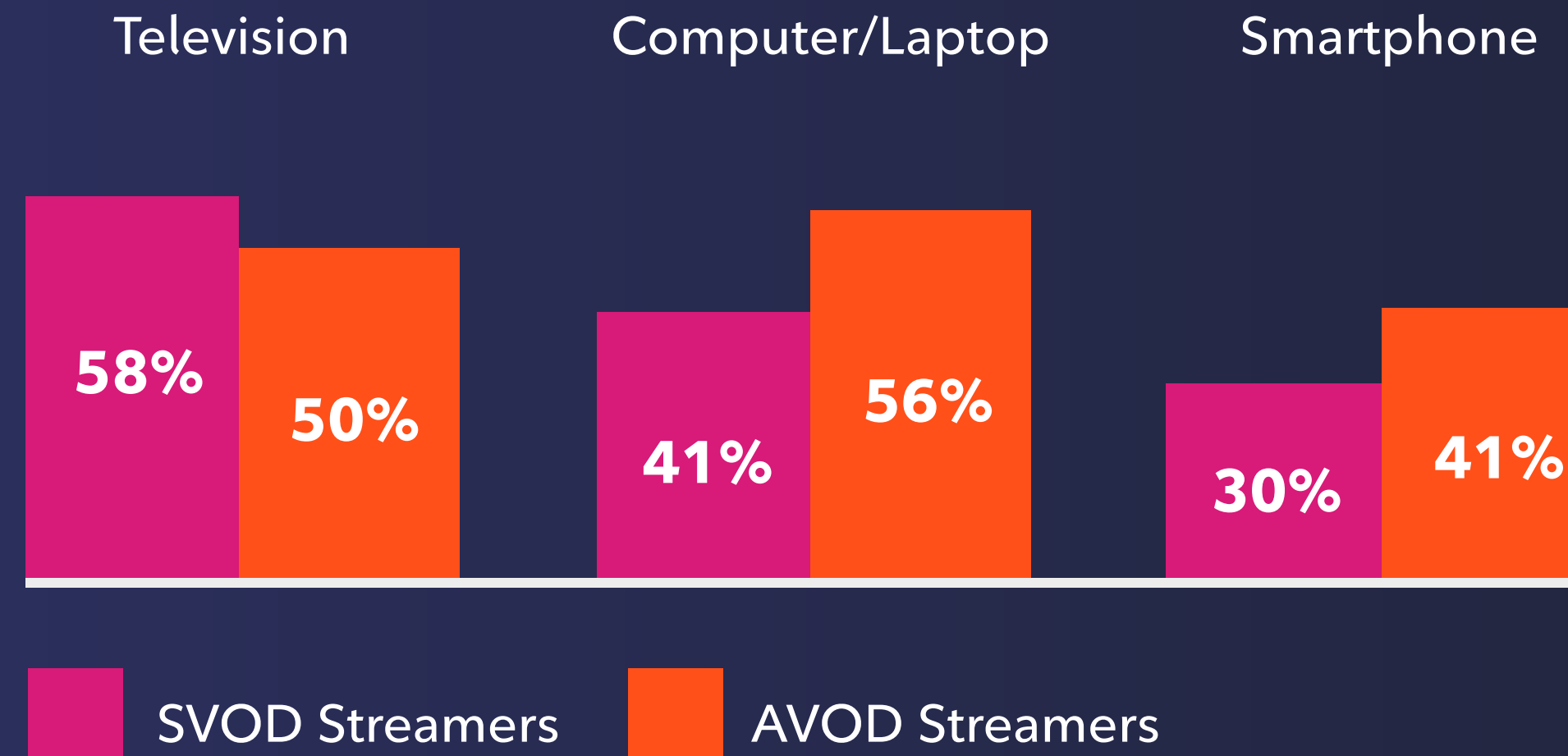
**SVOD streamers are more likely to have a TV subscription** (64% vs. 60% of AVOD users), while AVOD streamers spend more time streaming daily (3.5 hours vs 2.5 hours for SVOD streamers).<sup>1</sup>

There is still significant overlap between the two: 81% of AVOD streamers also subscribe to an SVOD service.<sup>1</sup>

85% of Tubi streamers in Canada are watching through a Connected TV or connected device.<sup>1</sup>



When it comes to content consumption, television is a popular device used by both SVOD and AVOD streamers. However, AVOD streamers tend to use companion devices more so than SVOD streamers. **For AVOD streamers, a computer/laptop is their top device for streaming.**

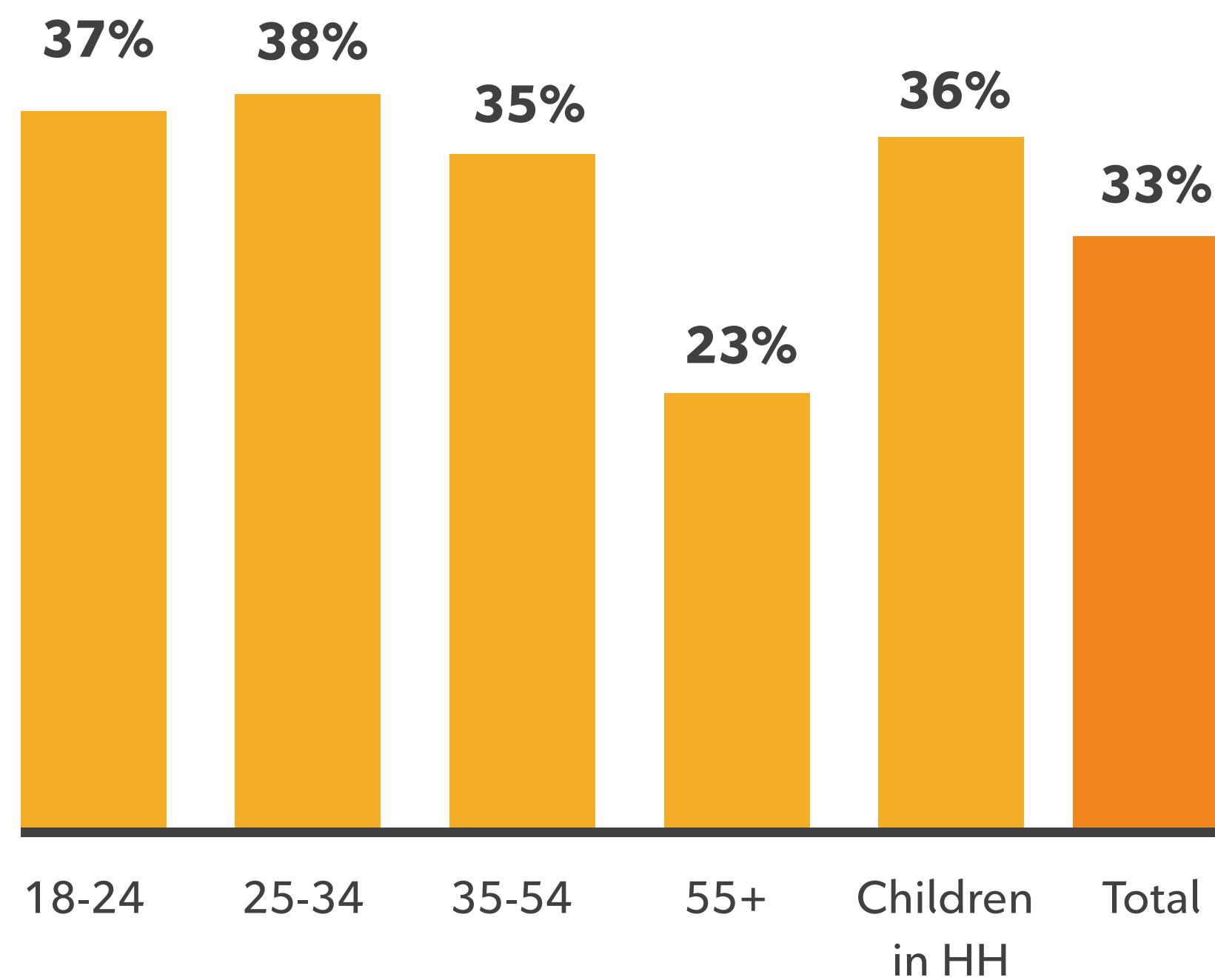


**AVOD streamers are more likely to have tried a free trial of an SVOD service in 2020.** (44% vs 33% of SVOD).<sup>1</sup>

# STREAMERS ARE PRICE SENSITIVE

Free trial offers proved to be an effective way for gaining and maintaining SVOD subscribers in 2020. **Fully One-third of Canadians (33%) used a free trial last year.**<sup>1</sup>

## CANADIANS WHO USED FREE TRIAL TO SUBSCRIBE TO A NEW PAID STREAMING SERVICE IN 2020

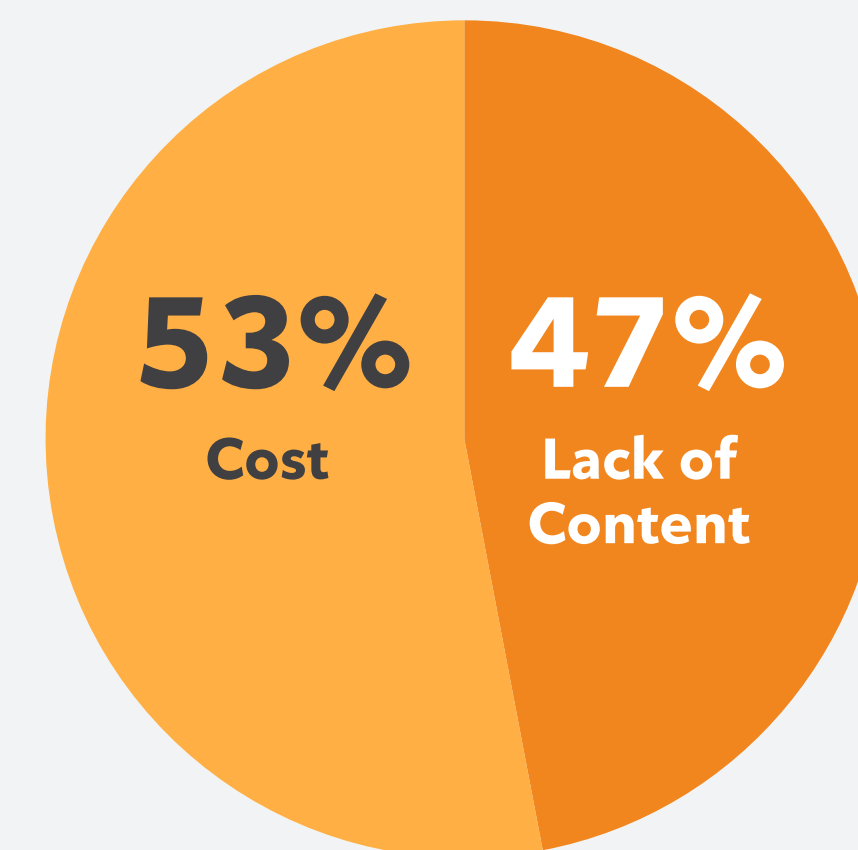


Source: Rogers Sports & Media Canadian Streaming Study April 2021

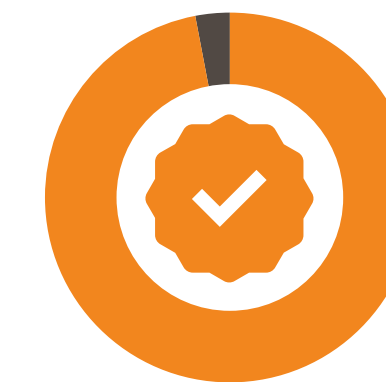


While price played a significant role in SVOD subscription cancellation, content was nearly as important: of those who cancelled a subscription after their free trial was over, 47% cited lack of content as the primary reason for cancellation.<sup>1</sup>

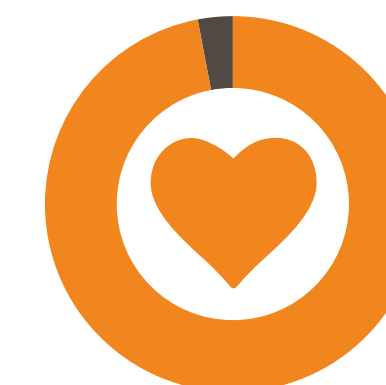
## REASON FOR CANCELLING SUBSCRIPTION:



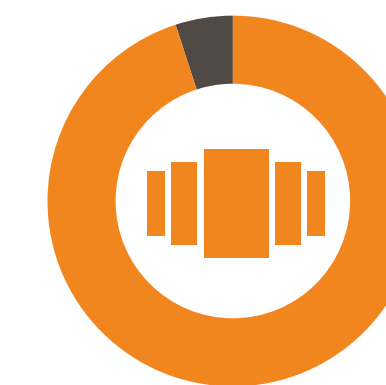
Source: Rogers Sports & Media Canadian Streaming Study April 2021



**97%** AGREE **QUALITY OF PROGRAM IS AN IMPORTANT FACTOR**<sup>1</sup>



**97%** AGREE IT IS IMPORTANT FOR THEIR SERVICE(S) TO CARRY **PROGRAMS THEY LOVE**<sup>1</sup>

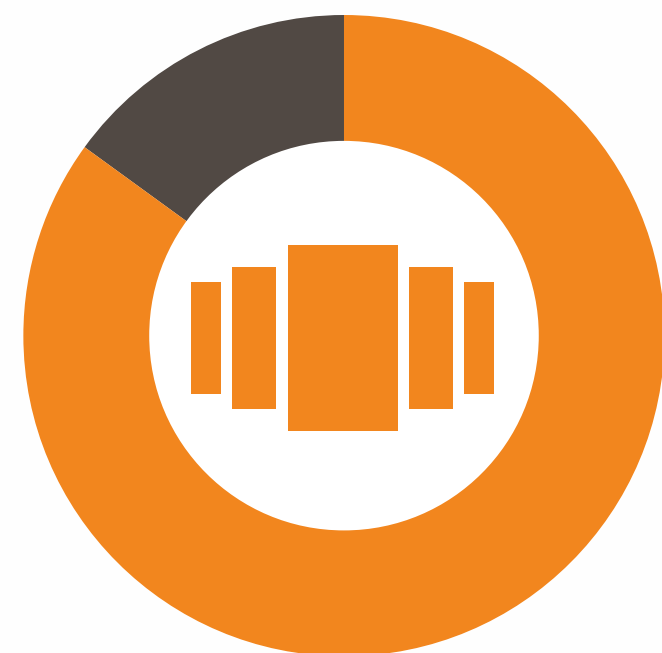


**95%** AGREE IT IS IMPORTANT TO HAVE **A WIDE LIBRARY**<sup>1</sup>

We look more closely at how content influences streaming consumption in the next section.

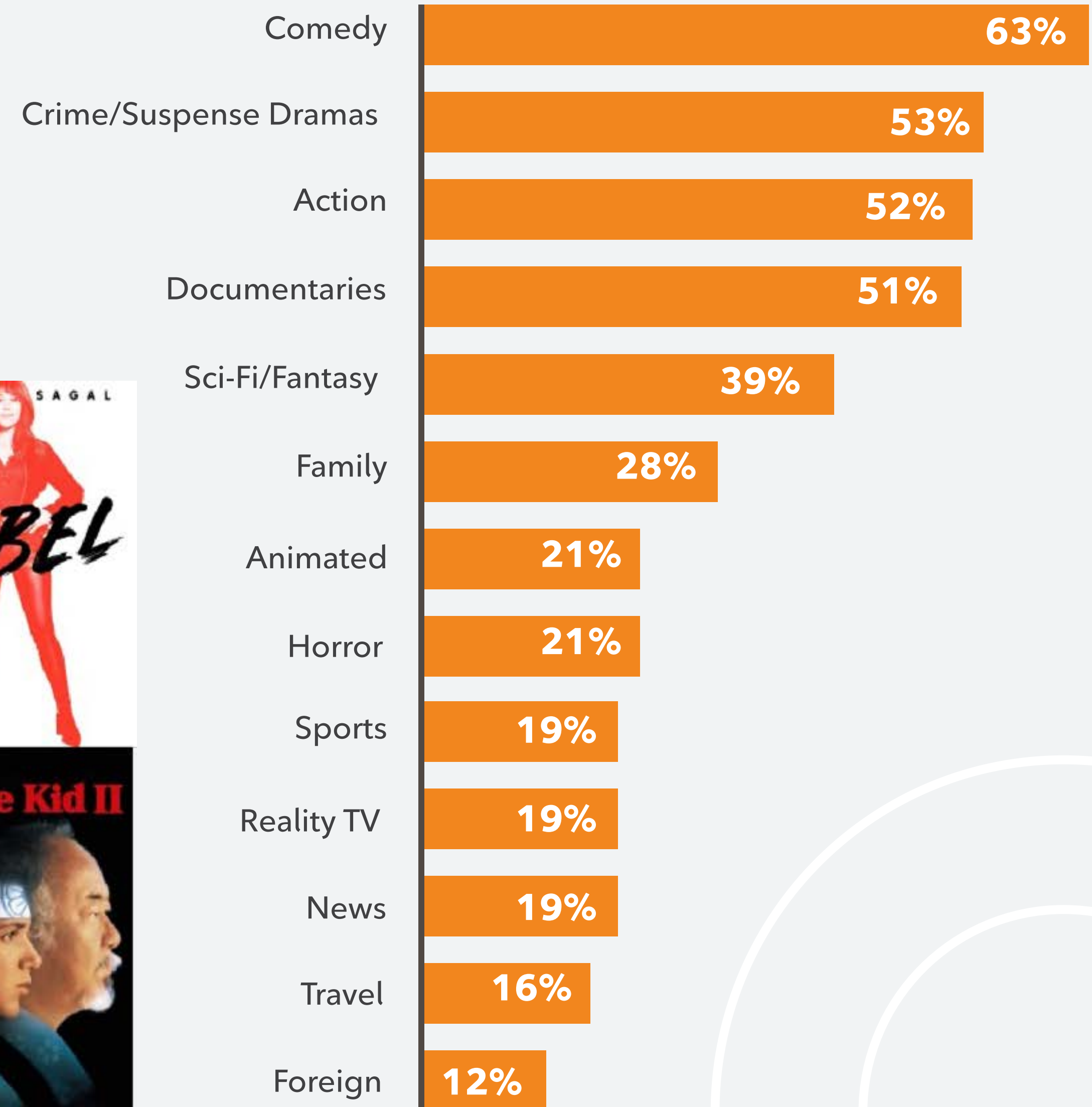
# HOW CONTENT INFLUENCES STREAMING CONSUMPTION

Canadians expect both breadth and depth from their streaming services. For example, 85% of Canadians who stream agree it is important to have a mix of older and newer content.<sup>1</sup> As we see here, a mix of genres is equally important.



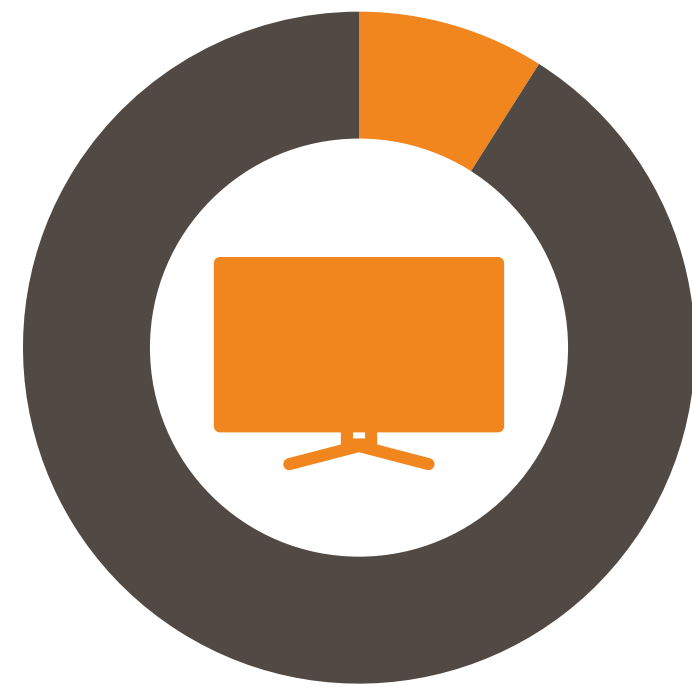
**85%**  
OF STREAMERS  
AGREE IT IS  
IMPORTANT TO HAVE  
A MIX OF OLDER AND  
NEWER CONTENT<sup>1</sup>

## TOP GENRES BEING WATCHED - ALL STREAMERS:



# SPORTS STREAMING: IT'S SMALL BUT GROWING QUICKLY

While we expect sports streaming to grow rapidly in the future, it has yet to become a mainstream part of viewing habits.



CURRENTLY  
**9% OF CANADIANS**  
SUBSCRIBE  
TO A SPORTS  
STREAMING SERVICE<sup>1</sup>

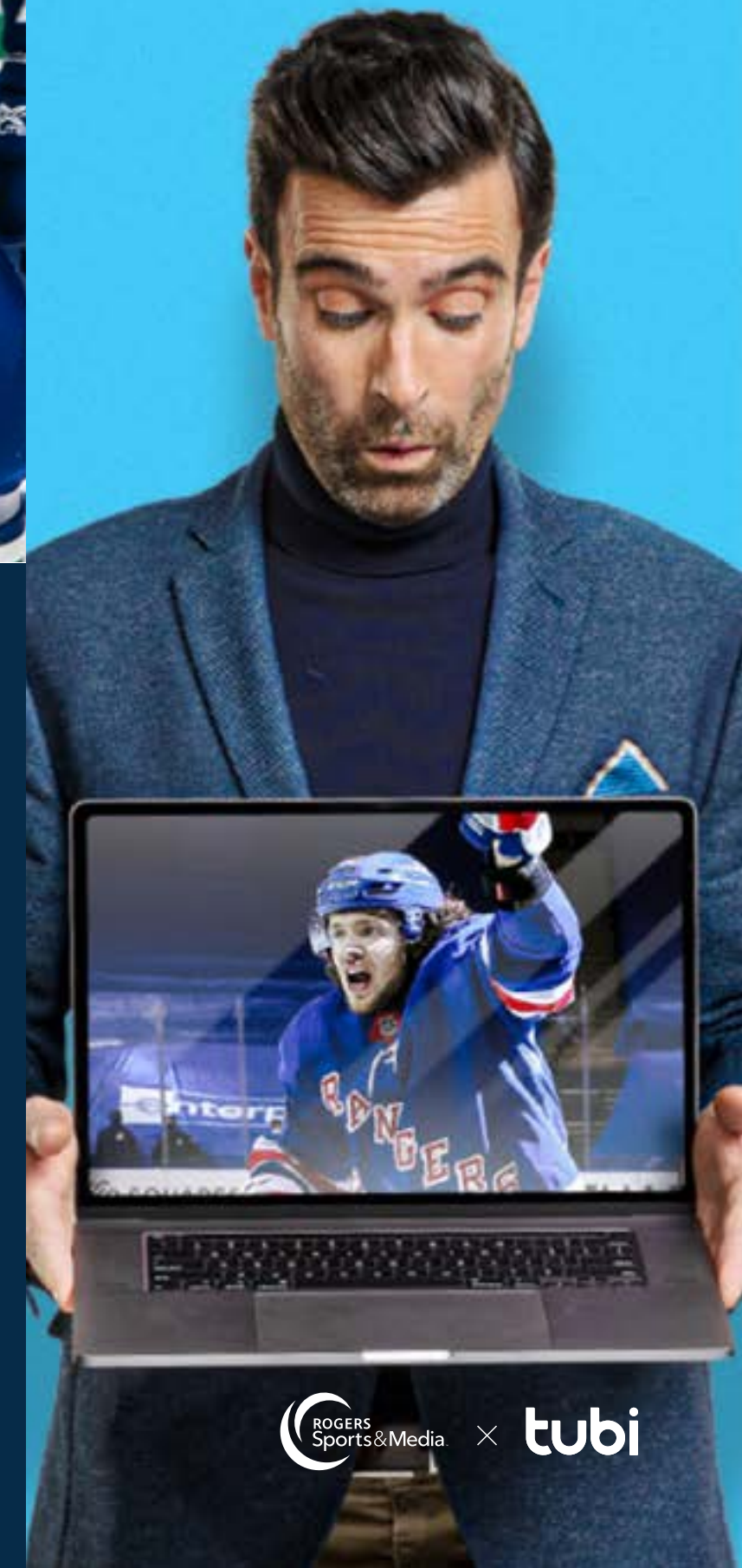
Even here, however, there are signs that habits are shifting. Streaming on SN NOW increased 15% in 2020 vs. 2019, with the NHL being a key driver.<sup>4</sup>



LIVE STREAM SPORTS  
**SN NOW**

Get With  
The Times  
Stream  
Sports  
Online.

[snnow.ca](http://snnow.ca)

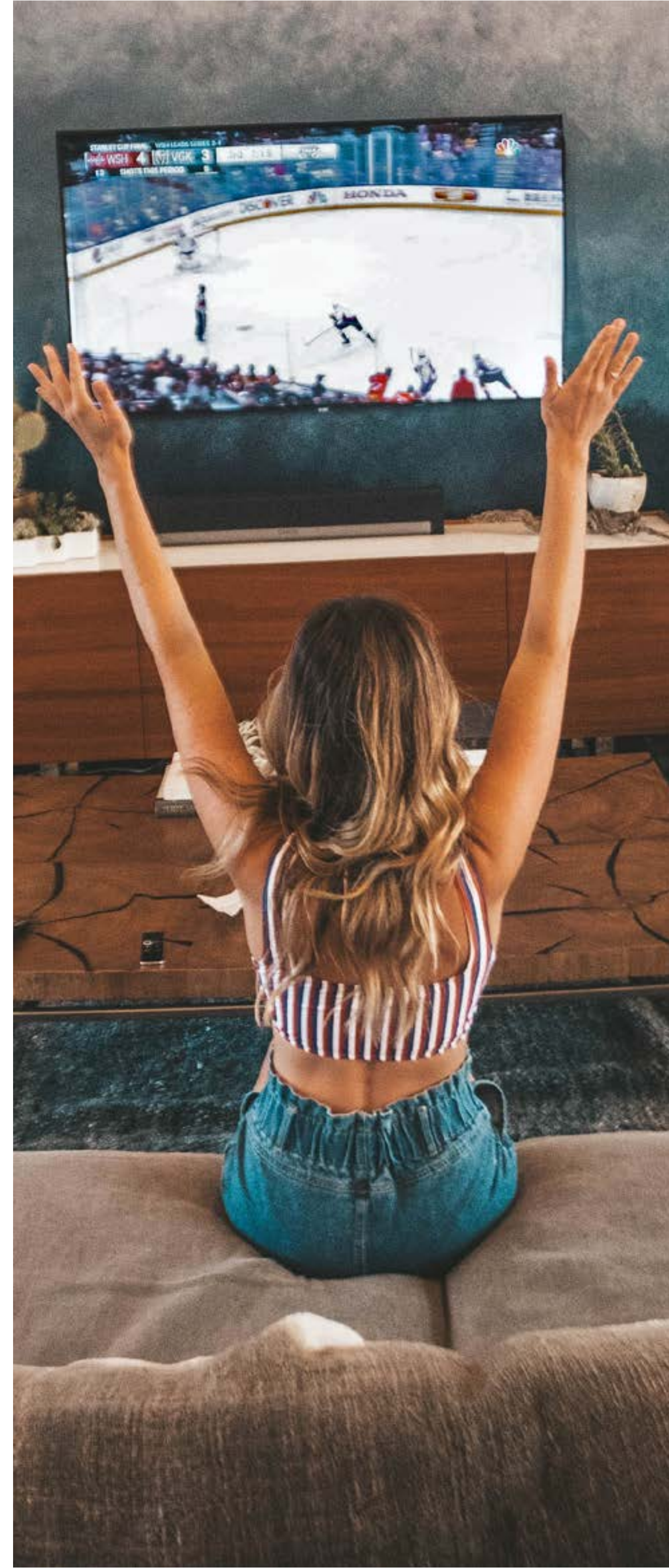


**Streams increased 81% on SN NOW** during hockey season throughout the pandemic vs. the same period pre-pandemic.<sup>4</sup>

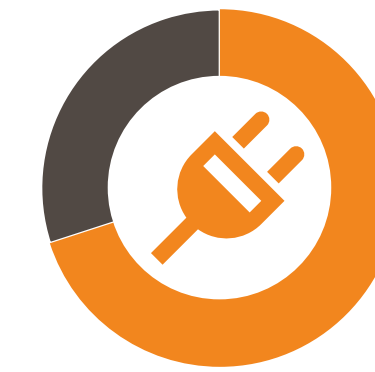
Similarly, in the first months of this year's baseball season, streaming on MLB.tv increased with total minutes up 19%, and the number of games watched to date up 24% YoY.<sup>4</sup>

The “must see” nature of sporting events shifts streamers priorities: they want high quality, convenient, and centralized access, and for now that means watching live via TV/cable. We expect increased investments in content personalization, including highlights, customized catch-up features, and betting integration, will drive more usage across sports streaming platforms.

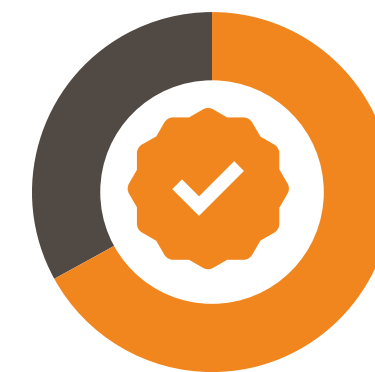
Although small, advertising opportunities on sports SVODs represent an opening to reach incremental audiences and our increased **investment in SN NOW** will drive product adoption and scale over time.



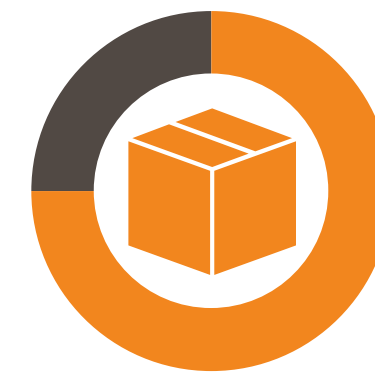
## SPORTS STREAMERS:



**70%**  
AGREE WATCHING LIVE  
**ON CABLE** TELEVISION IS  
MORE CONVENIENT<sup>1</sup>



**67%**  
AGREE **THE QUALITY** IS  
BETTER ON CABLE TV<sup>1</sup>



**75%**  
AGREE THERE IS NOT  
**ONE SINGLE SERVICE**  
THAT PROVIDES ALL  
OF THE SPORTS THEY  
WANT TO WATCH<sup>1</sup>

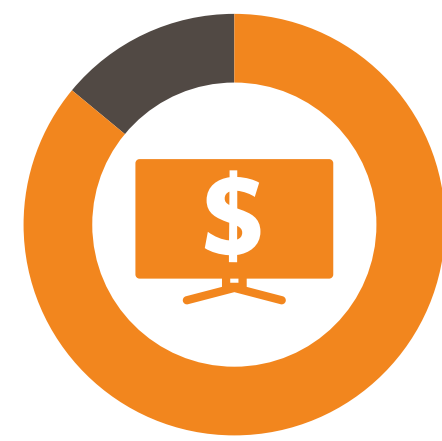
# UNDERSTANDING WHO STREAMS ROGERS SPORTS & MEDIA CONTENT

More than **6 million Canadians A18+** consume content through Rogers Sports & Media (RSM) streaming platforms, including **Sportsnet Now, CityTVNow, Tubi, and others.**<sup>1</sup> From here on, we will refer to this group of users as RSM Streamers.

## OF RSM STREAMERS:



**36%**  
DO NOT HAVE A  
CABLE SUBSCRIPTION<sup>1</sup>



**86%**  
HAVE 1+ SVOD  
SUBSCRIPTION\*<sup>1</sup>



HAVE INCREASED  
THEIR CONSUMPTION  
**>1 HOUR**  
IN THE PAST YEAR<sup>1</sup>

\*Top Subscriptions in order: Netflix, Amazon, Disney+, Apple+, Crave.



Across all platforms,  
Canadians streamed  
**6.4B minutes of Rogers  
Sports & Media content**  
across all our properties  
in 2020.<sup>4</sup>



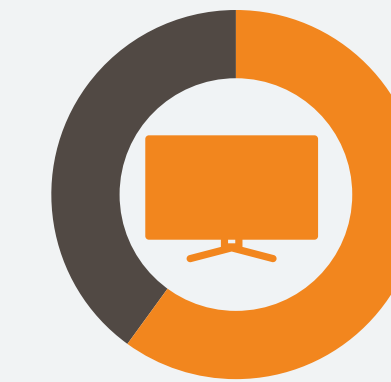
# MINUTES STREAMED MORE THAN DOUBLED IN Q4 2020 YOY<sup>1</sup>

## WHEN LOOKING AT WHO IS WATCHING

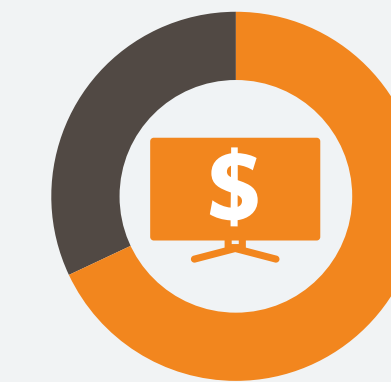
	RSM (ONLY)	TUBI	TV SUBSCRIBER	SVOD STREAMER	AVOD STREAMER
18-24	11%	11%	5%	7%	9%
25-34	34%	25%	17%	28%	27%
35-44	24%	19%	13%	16%	19%
45-54	15%	19%	24%	22%	20%
55-64	9%	13%	15%	12%	12%
65+	7%	13%	27%	16%	12%
Male	65%	59%	50%	49%	57%
Female	35%	41%	50%	51%	43%
Have Kids	35%	36%	30%	33%	34%
Single	44%	47%	38%	38%	46%
Married/Relationship	54%	53%	62%	62%	54%
Full-Time Employed	64%	50%	44%	53%	54%
HHI Less Than \$50K	25%	36%	22%	21%	30%
HHI \$50K-74.9K	20%	16%	18%	18%	18%
HHI \$75K-99.9K	16%	17%	16%	17%	16%
HHI \$100K-124.9K	10%	10%	11%	11%	10%
HHI \$125K+	20%	12%	20%	21%	17%
University Degree	51%	45%	45%	50%	49%

Source: Rogers Sports & Media Canadian Streaming Study April 2021

## WHEN LOOKING AT ALL RSM STREAMERS:



**70%**  
USE CONNECTED TV<sup>1</sup>



**68%**  
HAVE TV/CABLE SUBSCRIPTION<sup>1</sup>



SPEND ON AVERAGE  
**3.8 HOURS/DAY**  
STREAMING CONTENT<sup>1</sup>

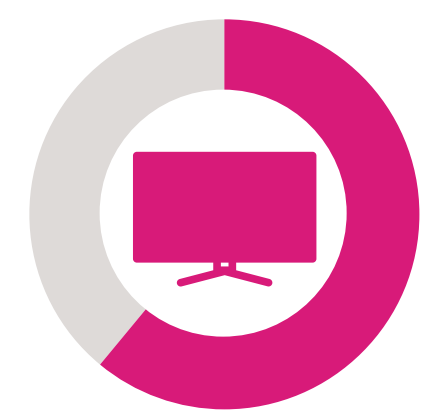


## DID YOU KNOW?

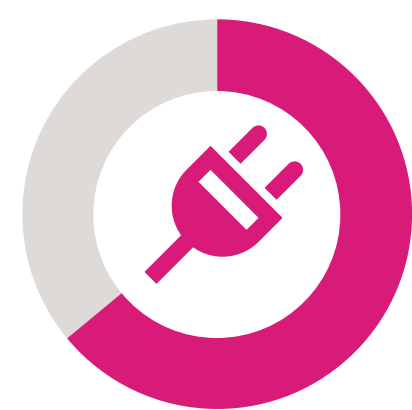
Including Rogers Sports & Media (RSM) streamers on your media plan provides 13.3% incremental audience reach of A18+ to RSM Television.<sup>1</sup> In total, RSM Television plus RSM Streaming reaches more than **20 million people every month including two out of three Canadian adults.**<sup>1</sup>

# UNDERSTANDING WHO STREAMS CONTENT ON TUBI

The AVOD service Tubi, a Rogers Sports & Media partner, reaches 4.65 million Canadians.<sup>1</sup> Of those:



**63%**  
USE  
CONNECTED TV  
TO WATCH<sup>1</sup>



**64%**  
ALSO HAVE  
A TV  
SUBSCRIPTION<sup>1</sup>



**85%**  
ALSO HAVE AN  
SVOD  
SUBSCRIPTION<sup>1</sup>



SPEND  
ON AVERAGE  
**4 HOURS A DAY**  
STREAMING  
CONTENT<sup>1</sup>

## TUBI STREAMERS TEND TO BE YOUNGER AND STREAM MORE

DEMOGRAPHIC	TUBI STREAMERS
18-24	11%
25-34	25%
35-44	19%
45-54	19%
55-64	13%
65+	13%
Male	59%
Female	41%
Have Kids	36%
Single	47%
Married/Relationship	53%
Full-Time Employed	50%
HHI Less Than \$50K	36%
HHI \$50K-74.9K	16%
HHI \$75K-99.9K	17%
HHI \$100K-124.9K	10%
HHI \$125K+	12%
University Degree	45%

Source: Rogers Sports & Media Canadian Streaming Study April 2021

In 2020, Canadians streamed a total of 4.4 billion minutes on Tubi, **up 155% from the previous year.**<sup>5</sup> All indications show consumption continuing to increase, as in Q1 2021, where total time streamed on Tubi increased 107% YoY.<sup>5</sup>

## DID YOU KNOW?

**Tubi provides 10.1% incremental audience reach of A18+ to an RSM Television campaign.**<sup>1</sup>

It should be noted that more than 15% of Tubi viewers do not watch YouTube, offering brands an incremental audience you'll have a hard time finding elsewhere.<sup>1</sup>



# STREAMING OFFERS NEW OPPORTUNITIES FOR ADVERTISERS

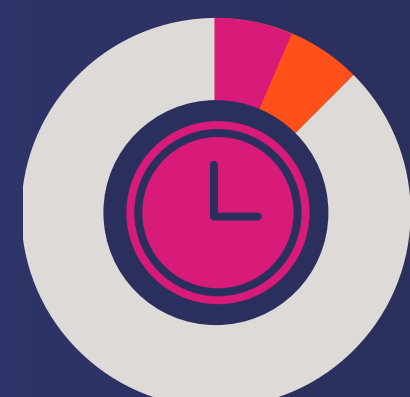
While streaming is a fast-growing force, it has not replaced linear TV but has become a complement. Streamers tend to use SVOD and AVOD to supplement their TV viewing. For advertisers, reaching a representative audience includes an investment in a mix of video platforms.

**For example, AVOD streaming services add an 18% incremental reach to TV campaigns.<sup>1</sup>**

## HOURS SPENT WATCHING TV ON A TV SET:



NON-SUBSCRIBERS WATCH  
**19.4 HOURS/WEEK**  
OF TV ON A TV SET<sup>2</sup>



SVOD SUBSCRIBERS WATCH  
**11 HOURS/WEEK**  
IN ADDITION TO THE  
**10.1 HOURS/WEEK THEY STREAM<sup>2</sup>**

### Streamers in general are open to advertising as part of their viewing experience:

52%

Say they would watch advertising for a discounted rate on paid streaming services.<sup>1</sup>

64%

Say they would watch advertising if service was free.<sup>1</sup>

### And the younger demographic, while less likely to have a TV subscription, are more accepting of ads:

60%

Agree they will watch ads for a discounted rate on paid streaming services.<sup>1</sup>

71%

Agree they will watch ads if the streaming service was free.<sup>1</sup>

### Free (AVOD) streamers are even more open to advertising.<sup>1</sup> Would watch ads for a streaming service that was free:

74.5%

AVOD STREAMERS<sup>1</sup>

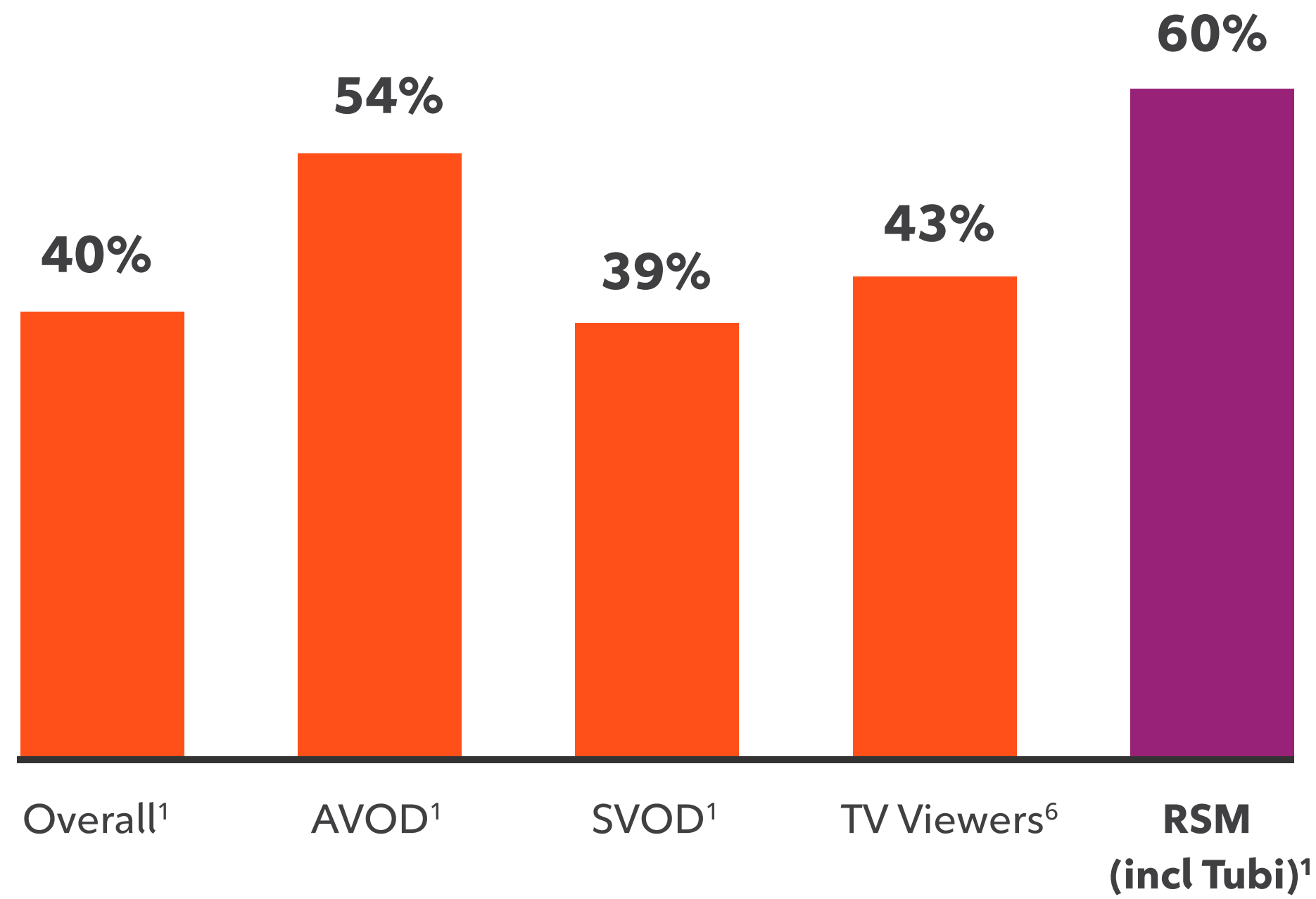
63%

SVOD STREAMERS<sup>1</sup>

They are also **2x more likely** to purchase a product after seeing an advertisement while streaming than the general population.

**Streamed ads have significant impact,** especially for Canadians who stream content with Rogers Sports & Media (RSM) and Tubi.

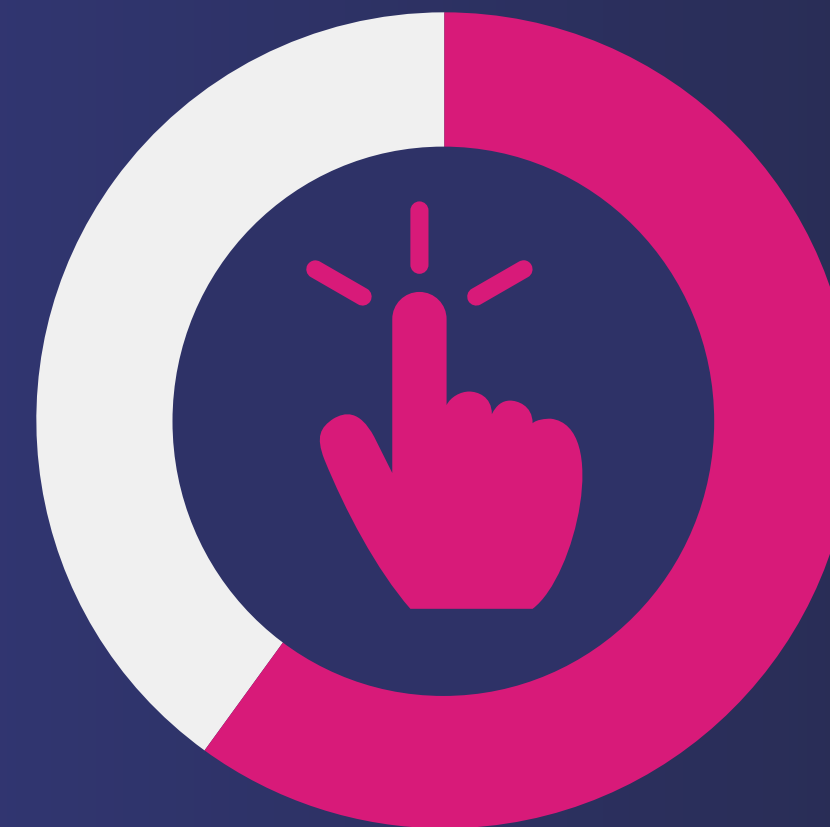
**TOOK ACTION AS A RESULT OF SEEING AN AD WHILE STREAMING**



\*Searched online, made a purchase, visited the website, recommended the advertiser, followed the advertiser on social media etc.



In fact **Tubi & RSM streamers are 47% more likely** than the average Canadian streamer to say they have been influenced by an advertisement while streaming.<sup>1</sup>



**60%**  
**TOOK ACTION**  
**AS A RESULT OF**  
**SEEING AN AD**  
**WHILE STREAMING<sup>1</sup>**

# 3 KEY TAKEAWAYS

## 01

### STREAMING IS A SIGNIFICANT OPPORTUNITY FOR ADVERTISERS

Younger audiences are supplementing TV viewing with streaming. They represent a huge opportunity for advertisers. These heavy streamers are more open to advertising and more likely to be influenced by ads.

But with this shift there is an increased opportunity: heavy streamers are more open to advertising as a way to reduce or eliminate the cost of their services and more likely to be influenced by ad impressions.

This effectiveness is even stronger for Rogers Sports & Media (RSM) and Tubi streamers, making them a desirable audience for advertisers.

**By supplementing a TV buy with targeted streaming, advertisers can significantly boost not just their reach, but the impact of their campaigns.**



## 02

### SPORTS STREAMING IS ONE TO WATCH

Fans prefer the experience of watching sports on the big screen and find cable/TV is more convenient to get all the games they are looking for today.

However, with an increase in sports subscriptions and time spent viewing on streaming services, we expect the landscape to change rapidly and that **fans will follow and shift their habits too. Sports streaming is definitely one to watch.**

# 03

## AVOD IS A SUPPLEMENTAL OPPORTUNITY

As more and more younger Canadians grow up with streaming ingrained into their habits, AVODs may be the best way for advertisers to reach them.

Canadians who stream are less likely to watch TV, and for highly desirable audiences you cannot reach on SVOD, AVOD offers an alternative.

**For advertisers, incorporating AVOD services such as Tubi is a way to engage with hard-to-reach viewers in an ad-friendly environment.**

Tubi, which offers more than 24,000 free movies and TV shows, also has some of the lightest ad loads in the industry, giving consumers and brands alike a true value exchange.



### Sources

1. Rogers Sports & Media Canadian Streaming Study April 2021
2. MTM SVOD Services Report - April 2021
3. Google Advanced TV Inventory Report
4. Internal Rogers Reporting Data
5. Internal Tubi Reporting Data
6. Vividata Winter 2021, Total Canada
7. Convergence Research April 2020

For questions related to this report, please contact your Rogers Sports & Media team lead or visit [www.rogerssportsandmedia.com](http://www.rogerssportsandmedia.com) and contact us today.



Citytv Now

FX NOW  
CANADA

funimation

tubi

MLB.TV

NHL LIVE

SN NOW

XITE

Rogers Sports & Media is a diverse sports and content company that connects with more than 30 million Canadians each week. The company's multimedia offerings include 54 radio stations, 29 local TV stations, 23 conventional and specialty television stations, podcasts, digital and e-commerce websites, and sporting events. Rogers Sports & Media delivers unique storytelling through its range of powerful brands: Citytv, OMNI Television, FX, TSC, 680 NEWS, 98.1 CHFI, KiSS, Breakfast Television, Cityline, CityNews, Sportsnet - Canada's #1 sports network, and the Blue Jays - Canada's only Major League Baseball team. Rogers Sports & Media is a subsidiary of Rogers Communications Inc. (TSX, NYSE: RCI).

**For questions related to this report, please contact your Rogers Sports & Media team lead or visit [RogersSportsandMedia.com](https://RogersSportsandMedia.com)**



# tubi

Headquartered in San Francisco, CA, Tubi ([www.tubi.tv](http://www.tubi.tv)), a division of FOX Entertainment, is an ad-supported video on demand (AVOD) service with movies and television shows from every major Hollywood studio.

Tubi gives fans of films and television programs an easy way to discover new content that is available completely free.

The service is currently available in the US, Canada, Australia, and Mexico.