

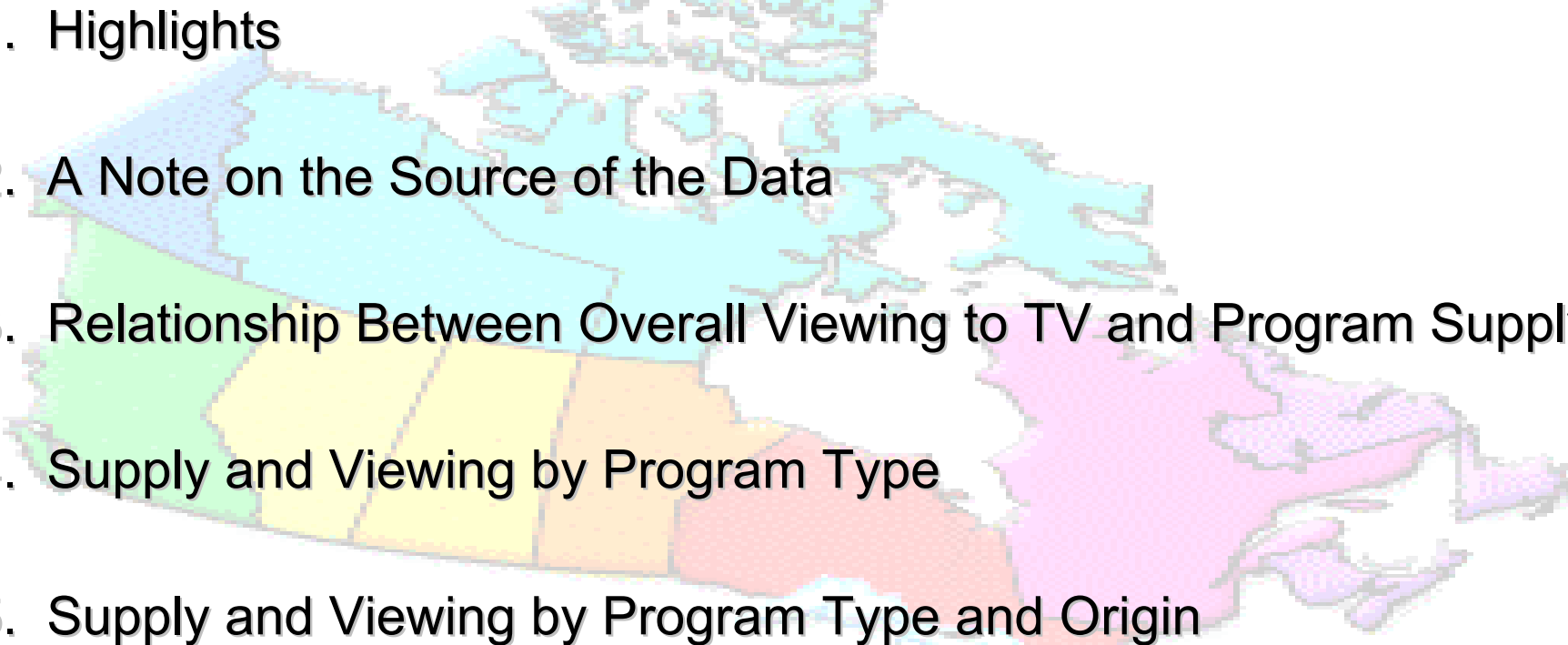


SHEDDING NEW LIGHT ON VIEWING TO CANADIAN PROGRAMMING

Prepared by CBC Corporate Research

May 31, 2002

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1. HIGHLIGHTS

The increased availability of Canadian programs on English and French TV in Canada, has not led to an increase in viewing of Canadian programs.

There has been a decline in the viewing of Canadian programs on French TV

Canada's public broadcaster accounts for one-third of all viewing to Canadian programming on English and French TV during prime time when most people are available to view it.

2. A Note on the Source of the Data

Both supply and viewing data

Derived from a 42-day sample (6 weeks) which is representative of the 2000-2001 broadcast year (September to August)

Nielsen People Meter is the source of viewing data

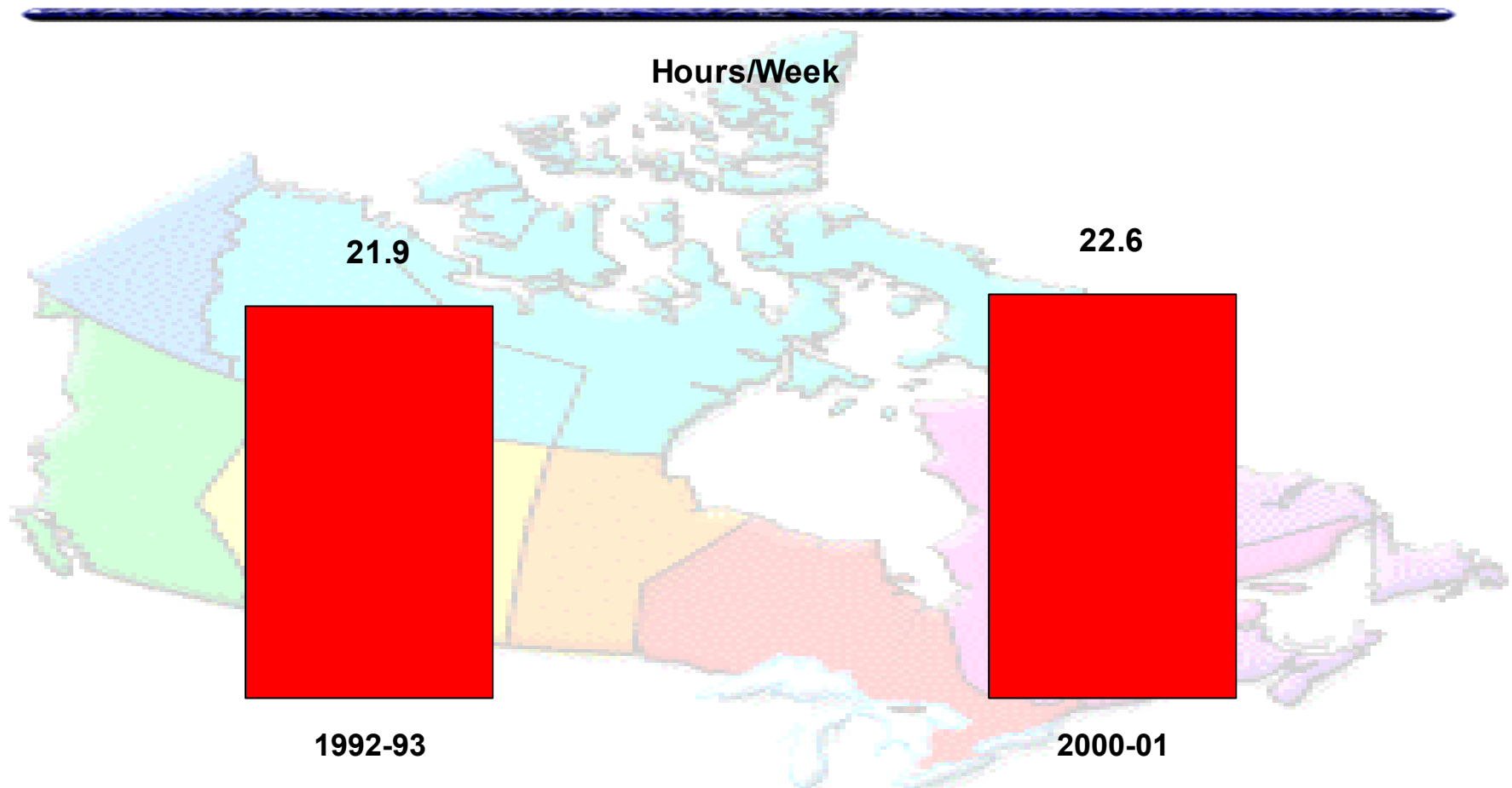
Supply database takes into account the number of persons able to receive a station/service

Data has been coded according to program origin and type by CBC Corporate Research

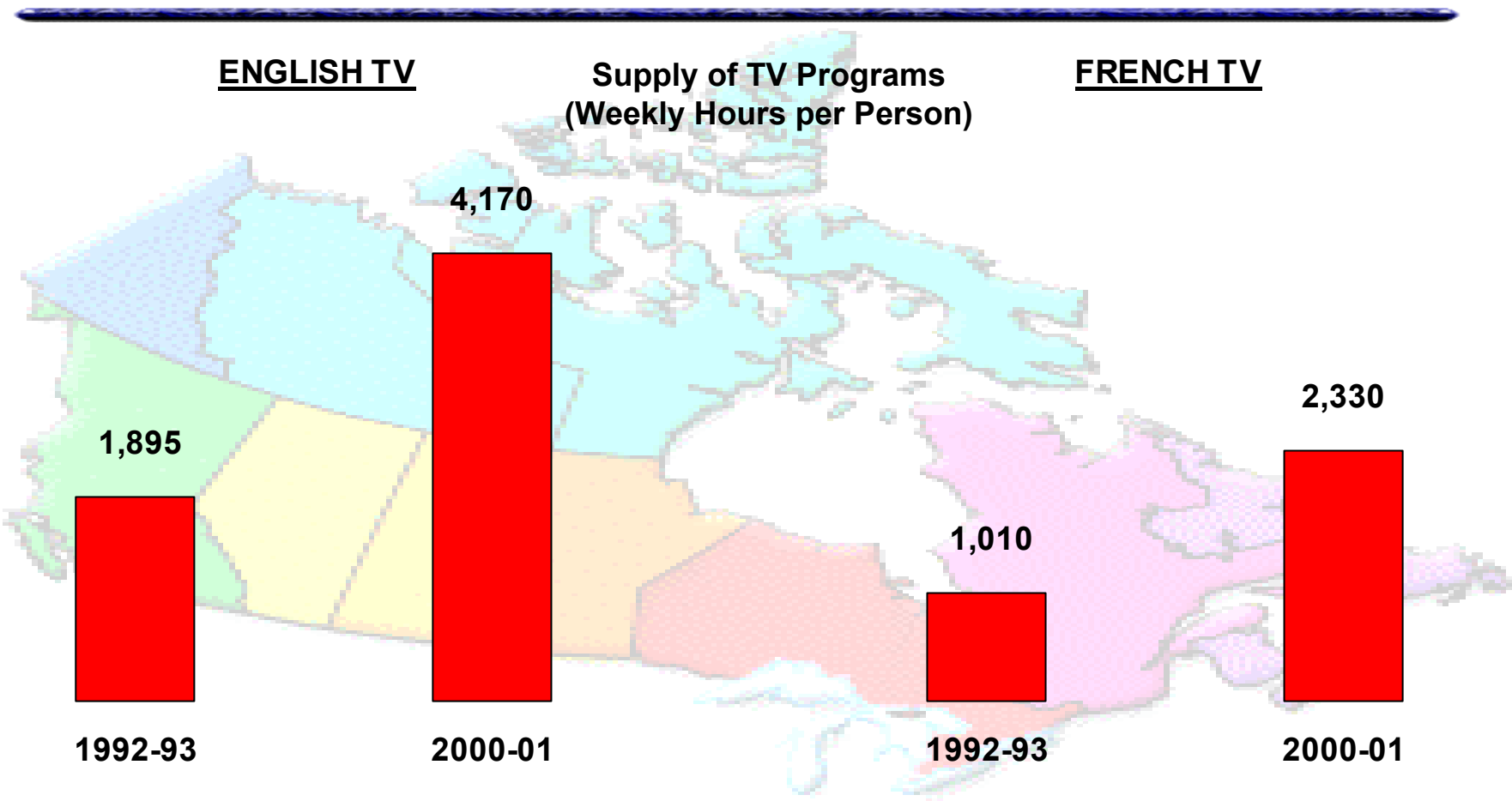
3. Relationship Between Overall Viewing to TV and Program Supply



While per capita viewing to TV in Canada has remained stable since 1992-93 at about 22 hours/week...

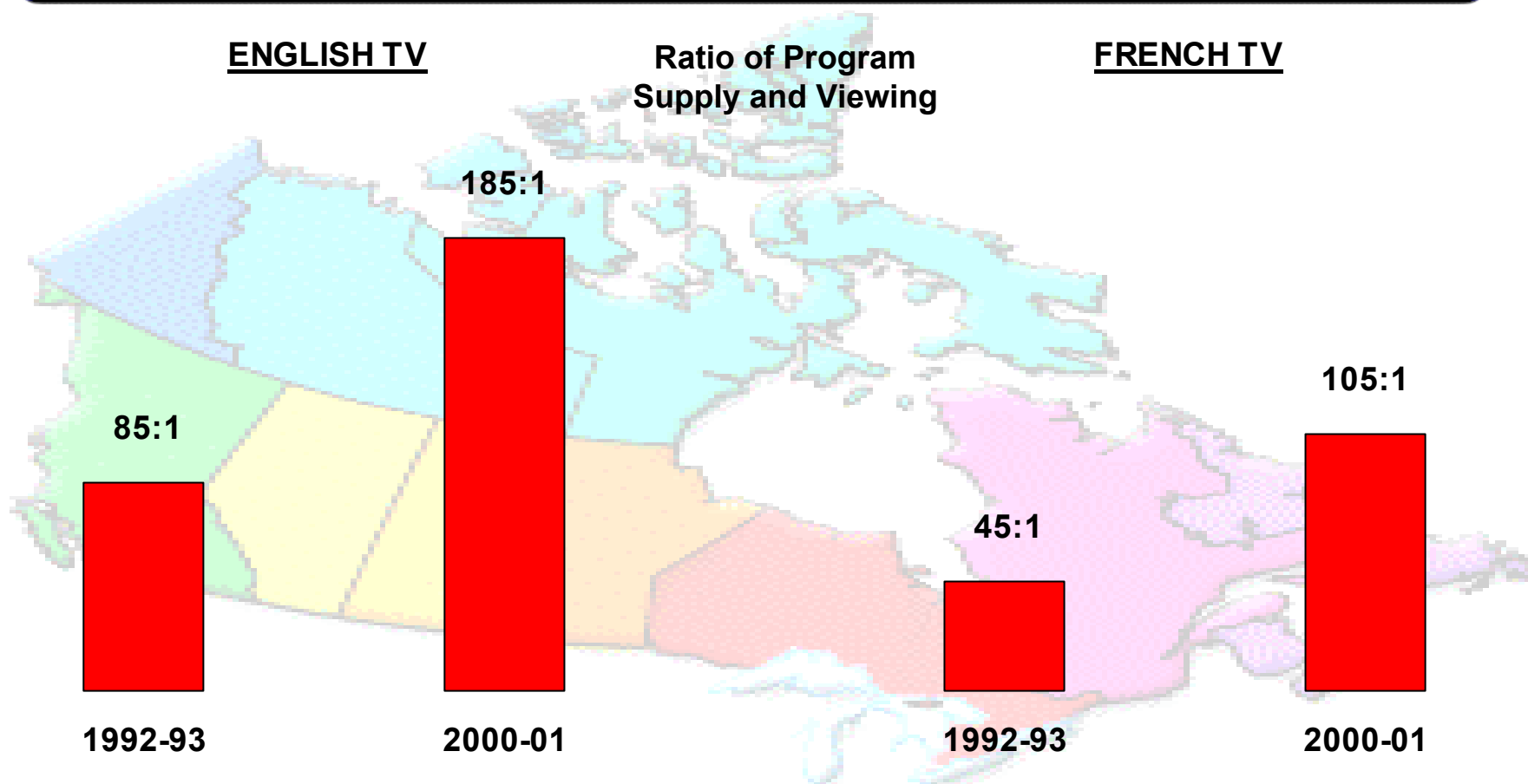


...the supply of TV programs available on both English and French TV in Canada has more than doubled.

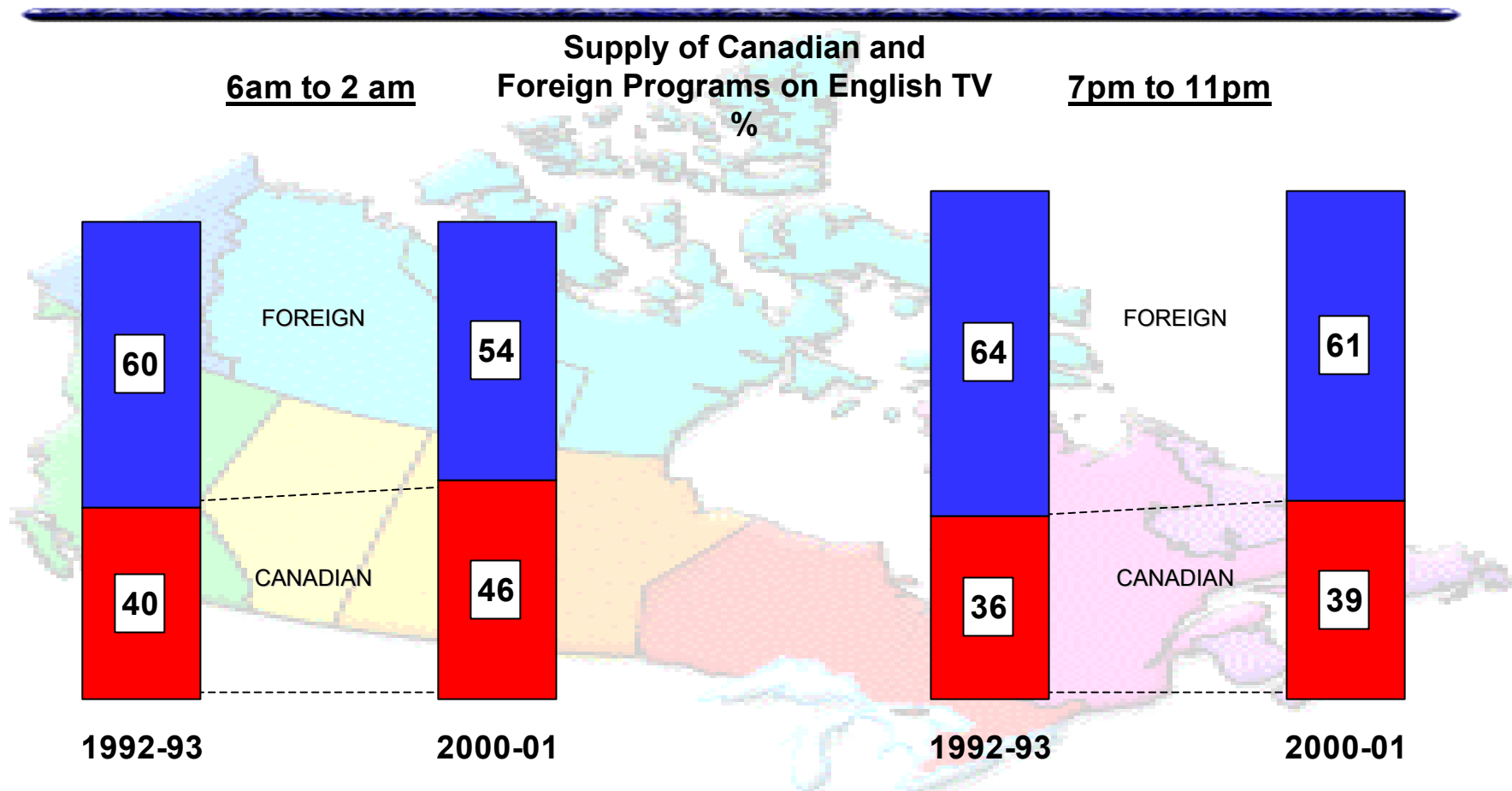


Source: CBC CORPORATE RESEARCH (NMR - broadcast year: September to August data)
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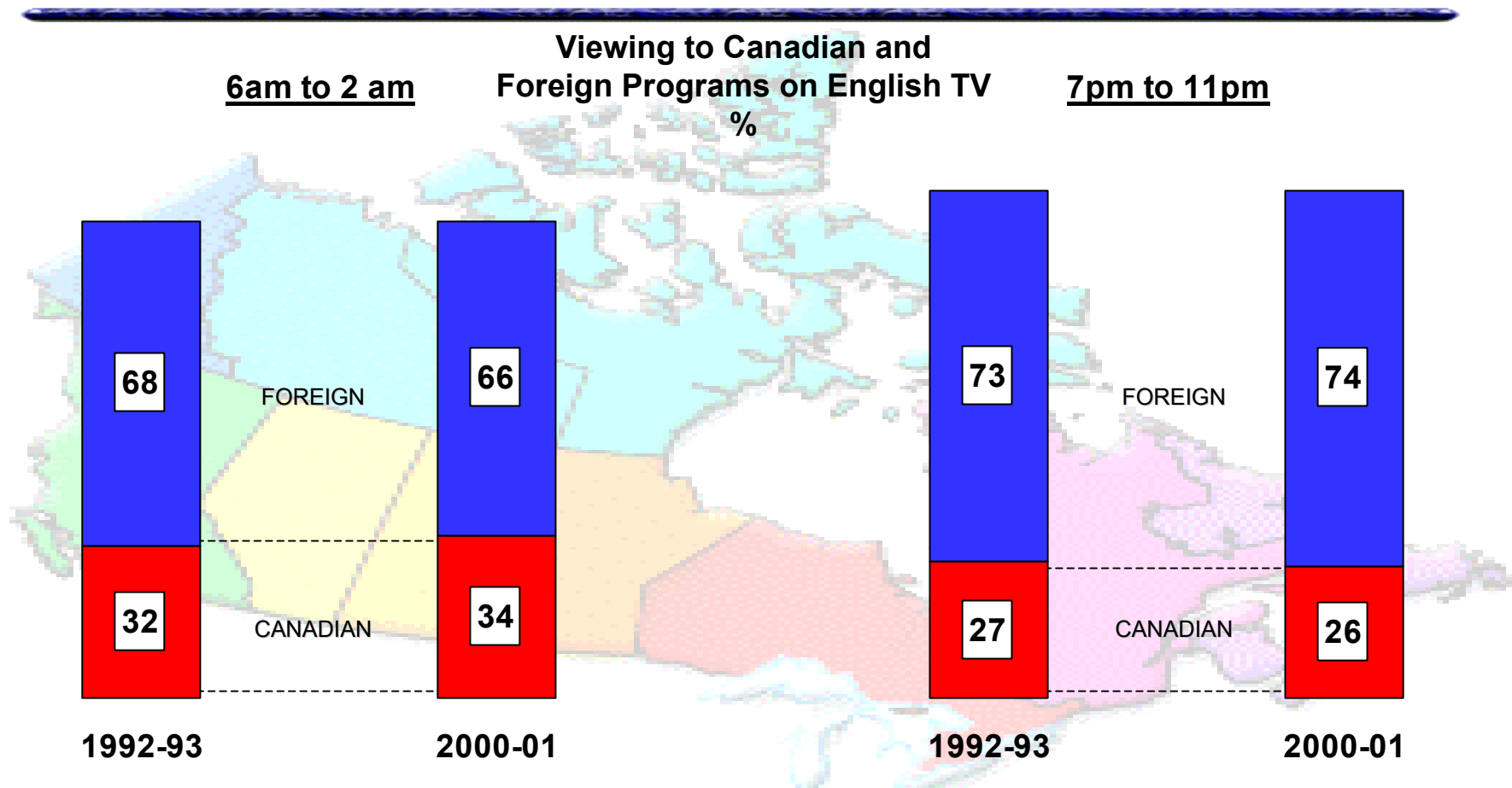
In the 2000-01 broadcast year, for every hour of TV watched on English TV, there were 185 hours of programming available to watch. The ratio for programs on French TV was 1 to 105.



Canadian programs now account for almost one-half (46 per cent) of all programs available on English TV in Canada.



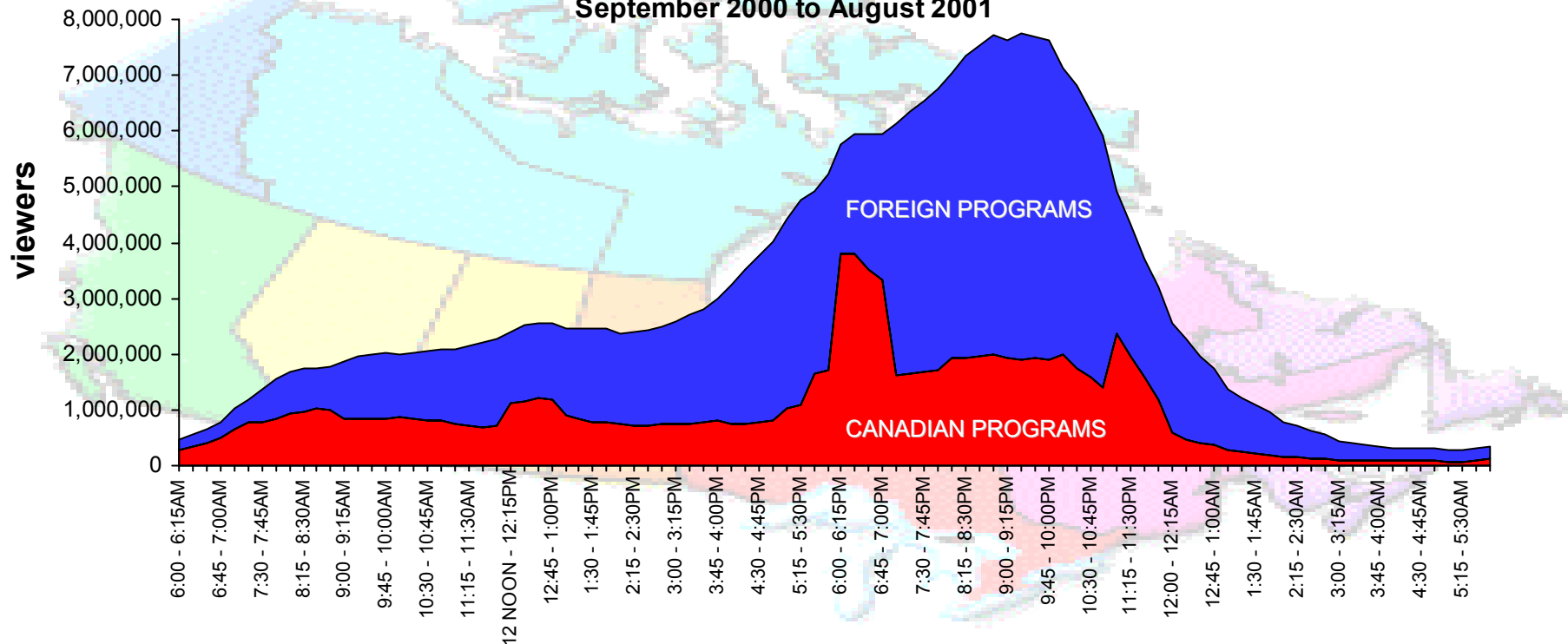
However, viewing to Canadian programs on English TV, as a proportion of all viewing, has remained stagnant over the last 10 years.



Viewing to Canadian TV programs peaks between 6 and 7pm when most English Canadian TV stations are carrying local news. This is a clear reflection of scheduling patterns as is shown in the attached block schedule.

Hourly Viewing Curve of Canadian/Foreign Programs on English TV

Monday to Sunday, All Persons 2+
September 2000 to August 2001






Basic Block Schedule Templates

Winter 2002

Canadian

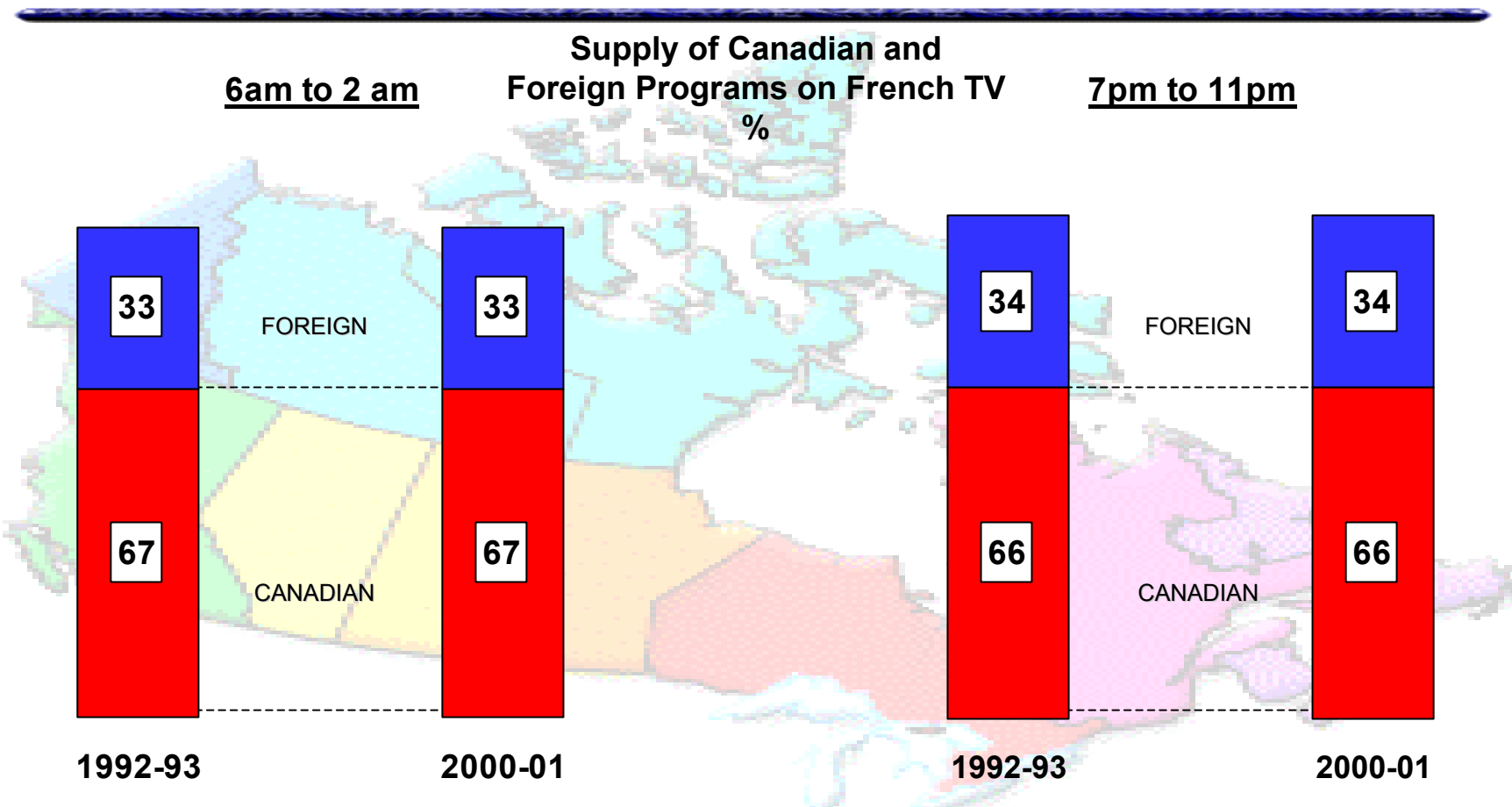
Foreign

Network	pm	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
	7	22 Mins It's A Living	Life & Times	Air Farce MarketPlace	Country Can On The Road	Our Hero Mr. Bean	Hockey Night In Canada	Emily Of New Moon
		Random Passage / Da Vinci's Inquest		The Nature Of Things	Witness	Open -ing Night		22 Mins Red Green Air Farce Made In Can
	Disclosure		the fifth estate					
	The National							Hockey
	7	Wheel Of Fortune					eTalk	Degrassi
		Jeopardy					Exhibit A	21C
	8	Who Wants Millionaire	Imagine That Wife & Kids	'80s Show Accord. Jim	Who's Line / CSI	Weakest Link	Mysterious Ways	Alias
			Drew Carey Scrubs	The West Wing				CSI: Crime Scene Inv.
9	Ally McBeal	Philly	Law & Order	E R	Law & Order SVU	Figure Skating / Cold Squad	W-FIVE	
10	Third Watch							
	7	Bob & Margaret					Psi Factor	Blackfly
		Entertainment Tonight						King Of Hill
	8	Boston Public	'70s Show Spin City	Smallville	Survivor / Friends	Dawson's Creek	Andromeda	Simpsons Malcolm
			Raymond Becker					Frasier The Job
10	NYPD Blue	Judging Amy	Blue Murder	The Agency	20 / 20	Outer Limits	The Practice	

Only titles and country of origin of programs which most frequently occupy time periods are shown.

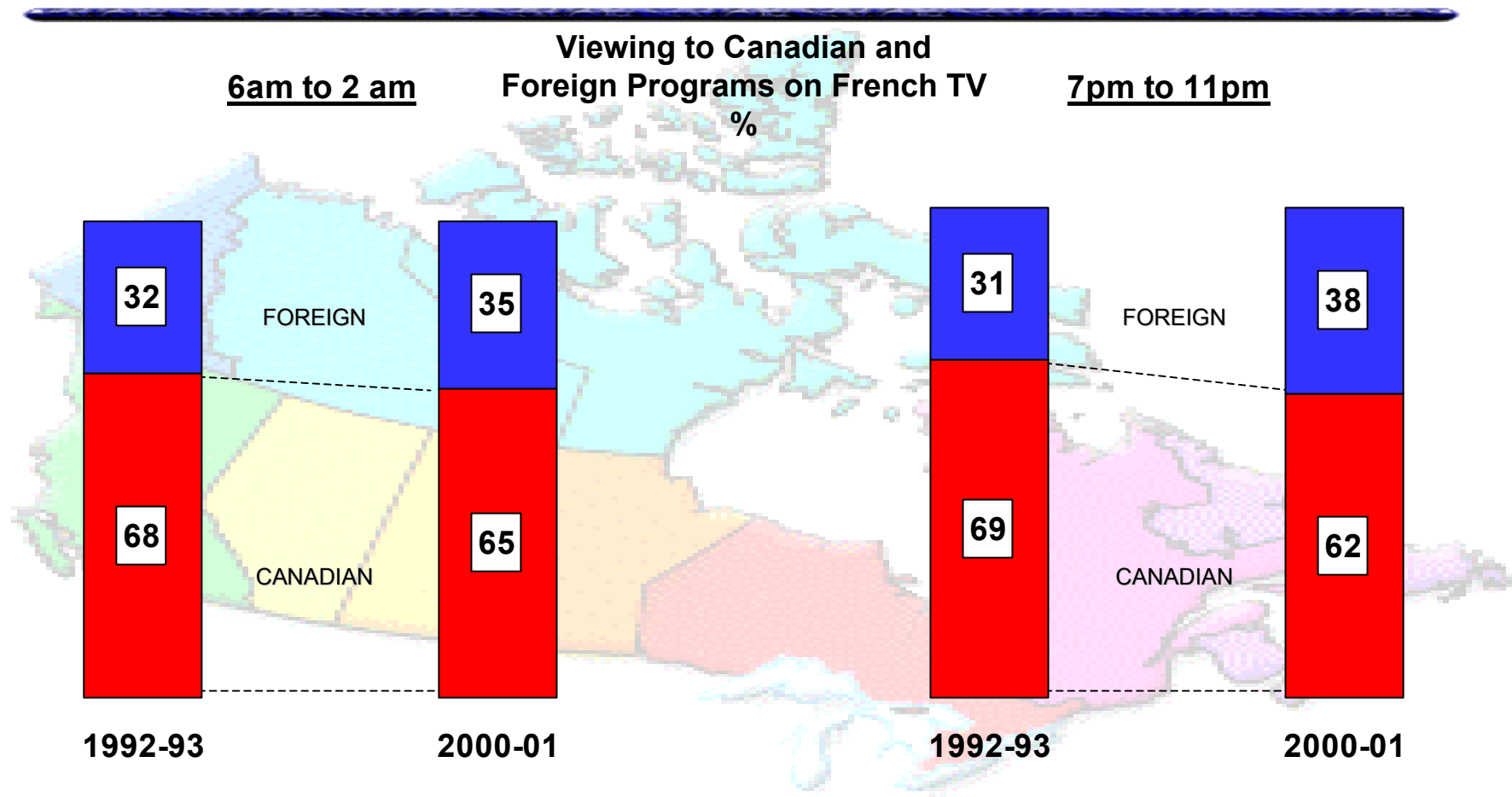
SHEDDING NEW LIGHT ON VIEWING TO CANADIAN PROGRAMMING

Canadian programs still account for two of every three programs available on French TV.



Source: CBC CORPORATE RESEARCH (NMR - broadcast year: September to August data)
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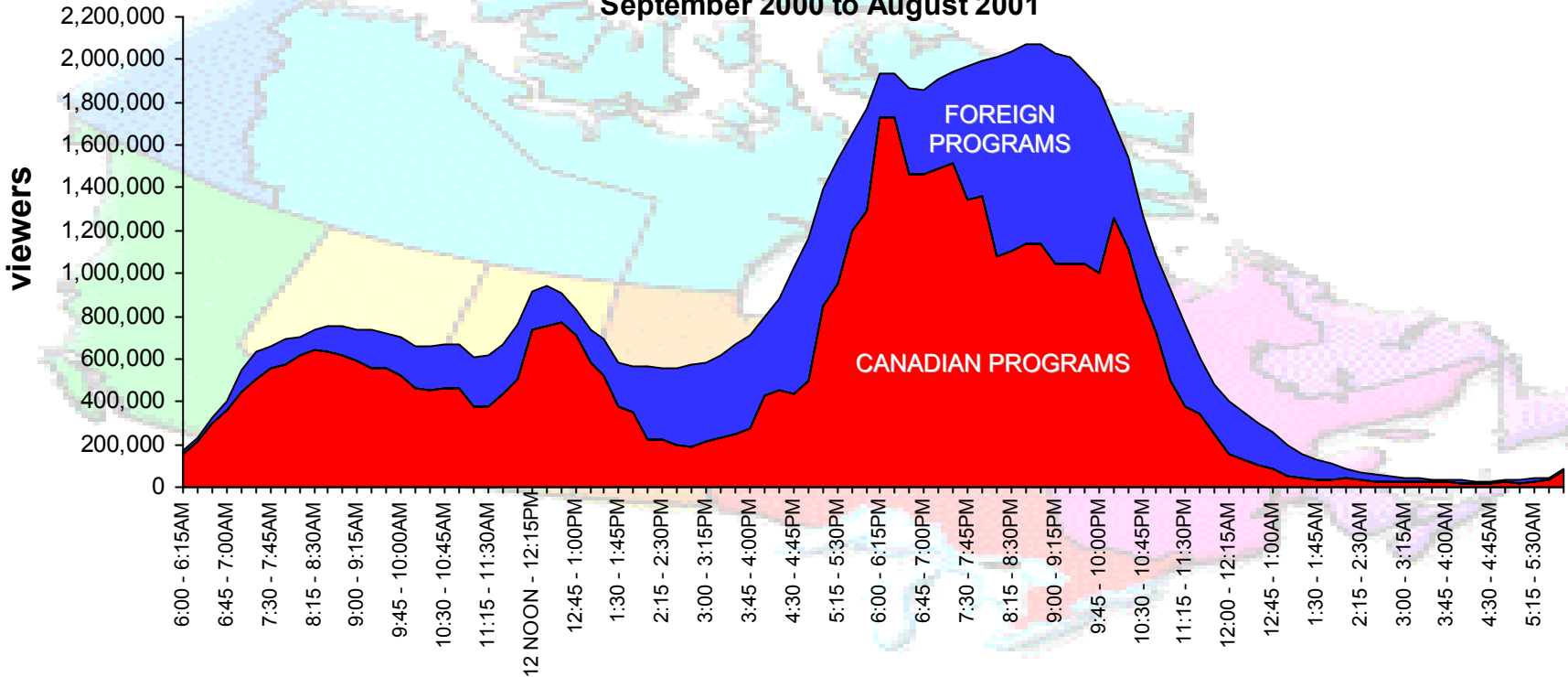
However, there has been a significant decline, especially in prime time, in the viewing of Canadian programs on French TV. This is the first drop in the viewing of Canadian programs on French TV in the past 10 years.



Viewing to foreign programming on French TV is concentrated in the heart of prime time (8-10pm).

Hourly Viewing Curve of Canadian/Foreign Programs on French TV

**Monday to Sunday, All Persons 2+
September 2000 to August 2001**

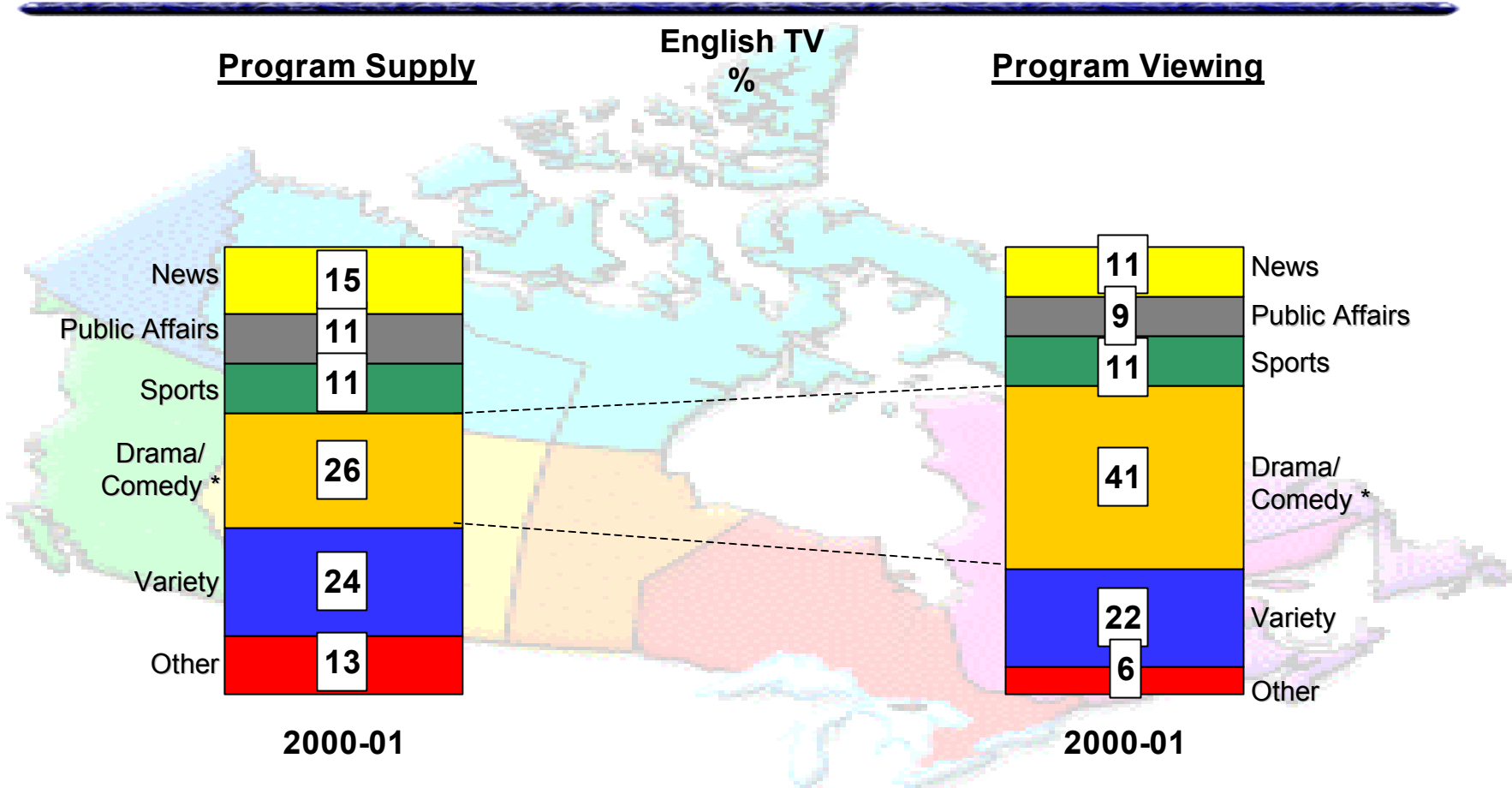


Source: CBC CORPORATE RESEARCH (NMR - broadcast year: September to August data)
SHEDDING NEW LIGHT ON VIEWING TO CANADIAN PROGRAMMING

4. Supply and Viewing by Program Type

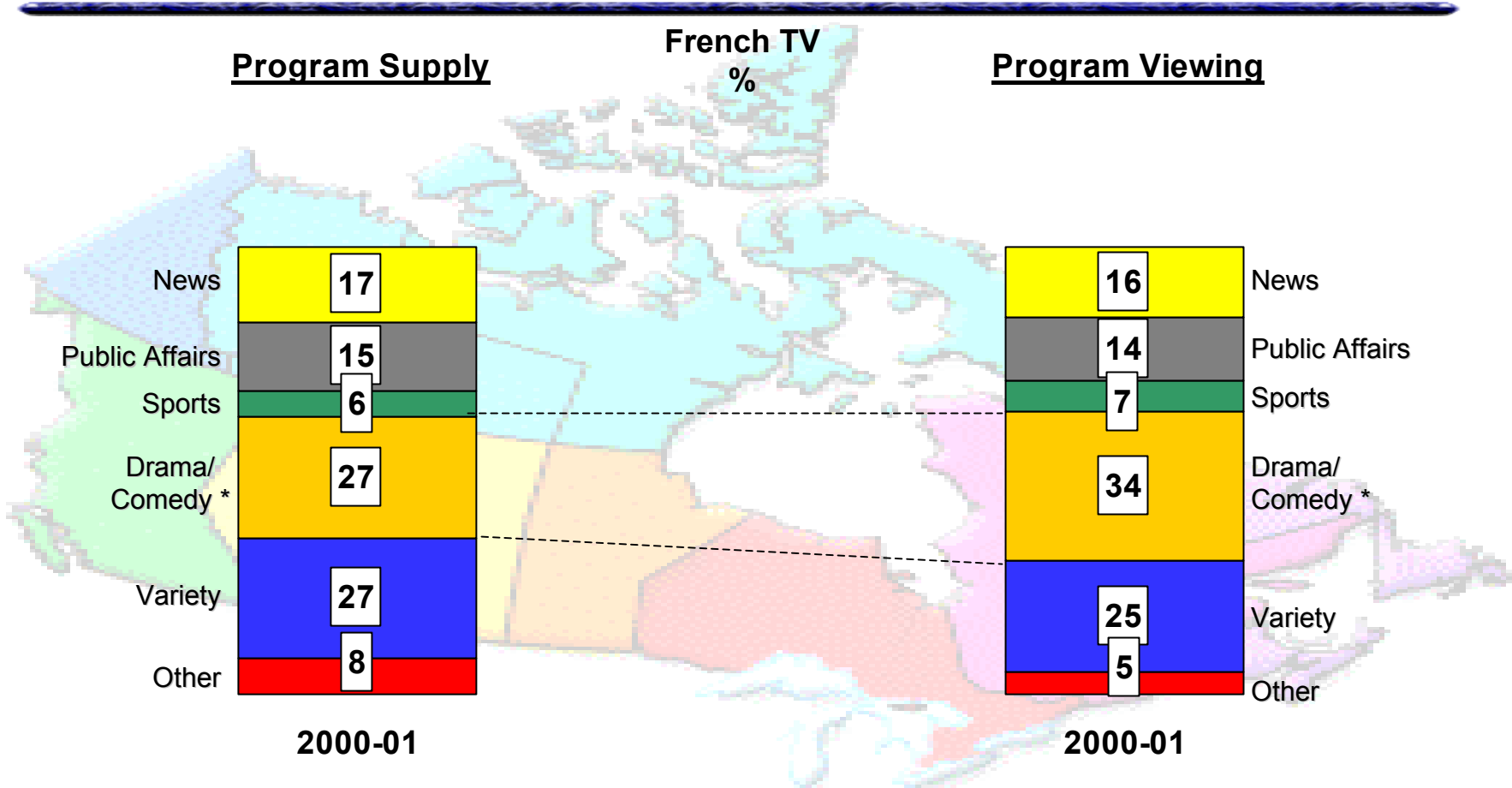


Drama/comedy still draw a disproportionate number of viewers on English TV.



*Includes Movies

Same tendency on French TV, but less severe.



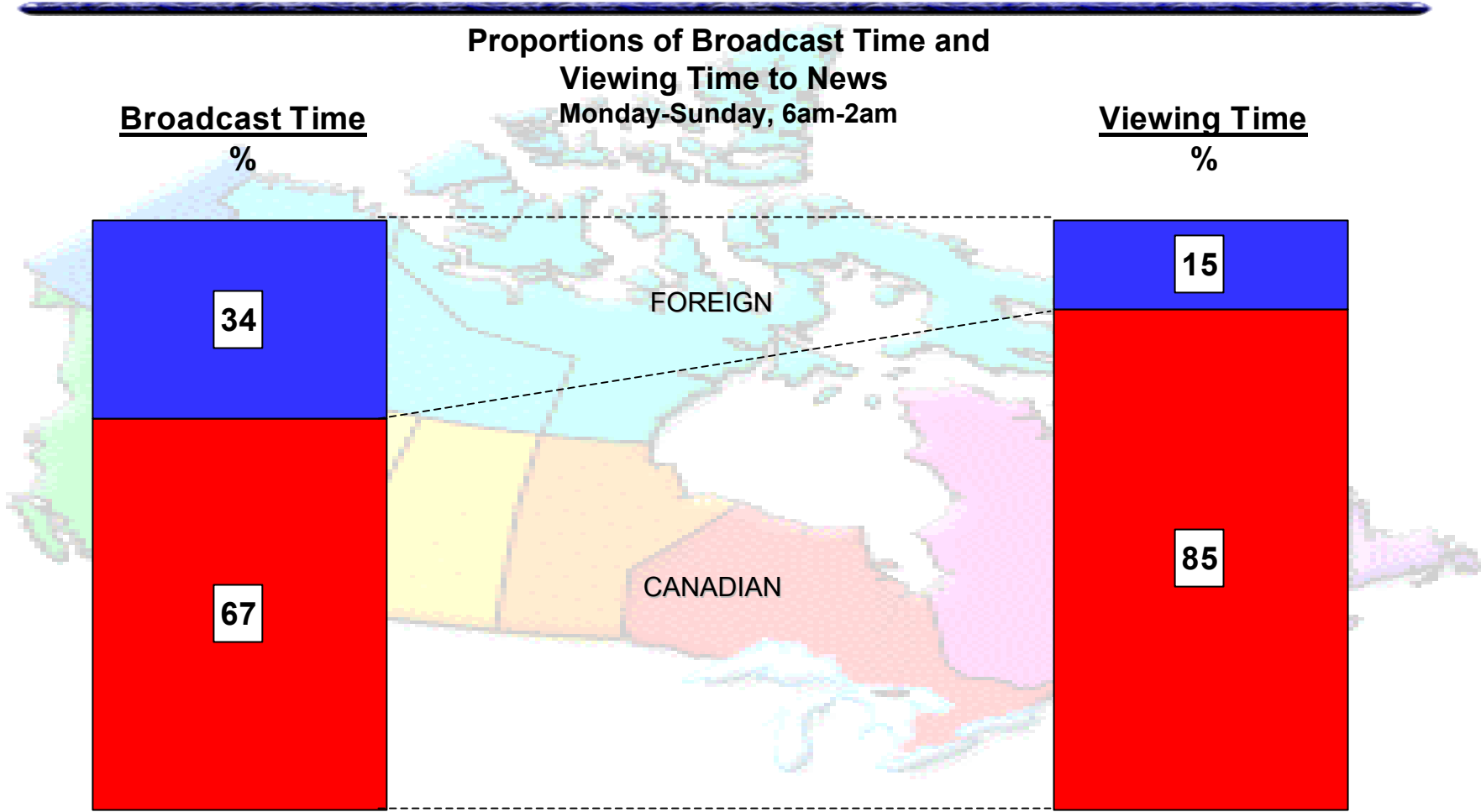
*Includes Movies

5. Supply and Viewing by Program Type and Origin



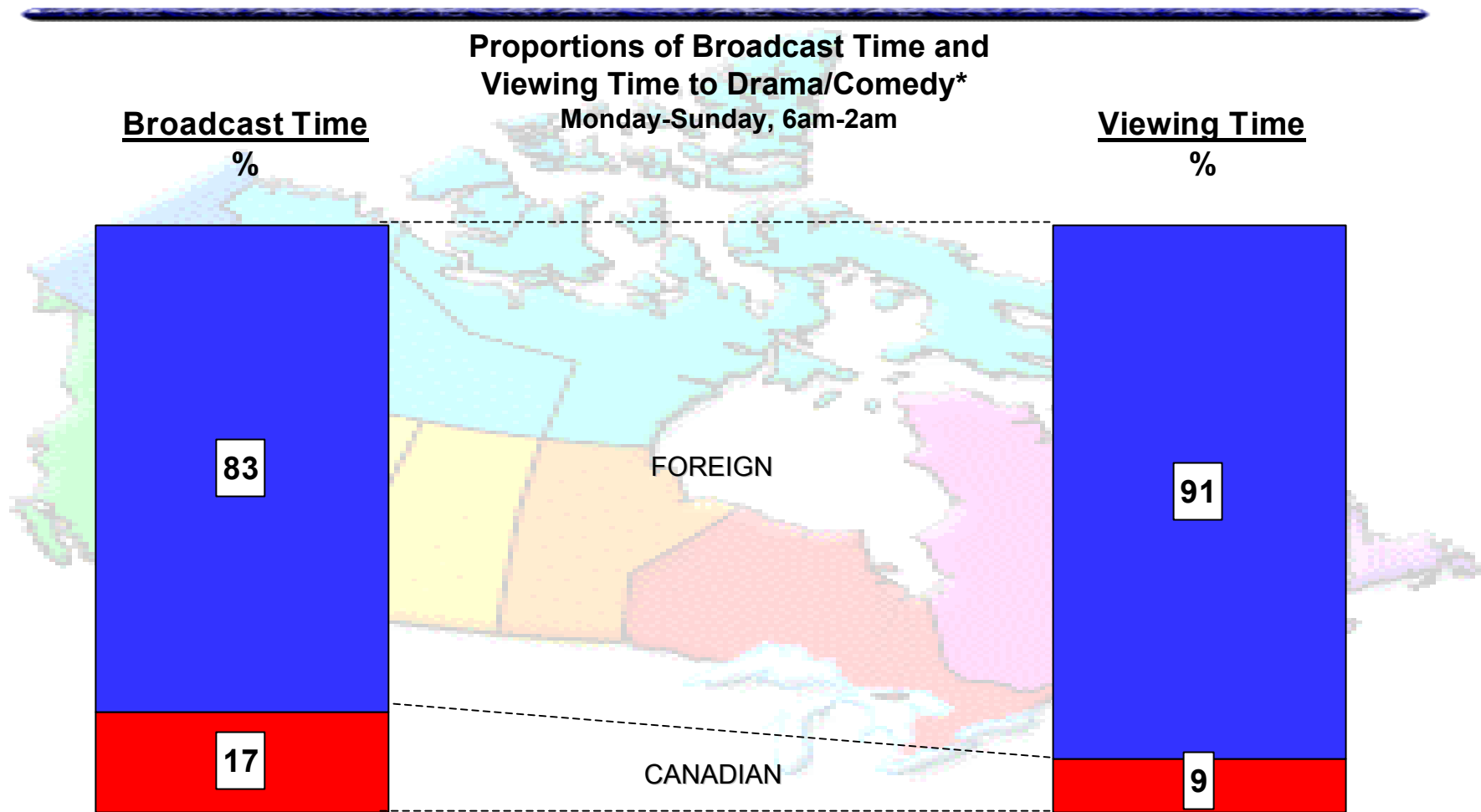
NEWS

When it comes to news, viewers of English TV turn to Canadian sources, despite the fact that one in three news programs available to view is foreign.



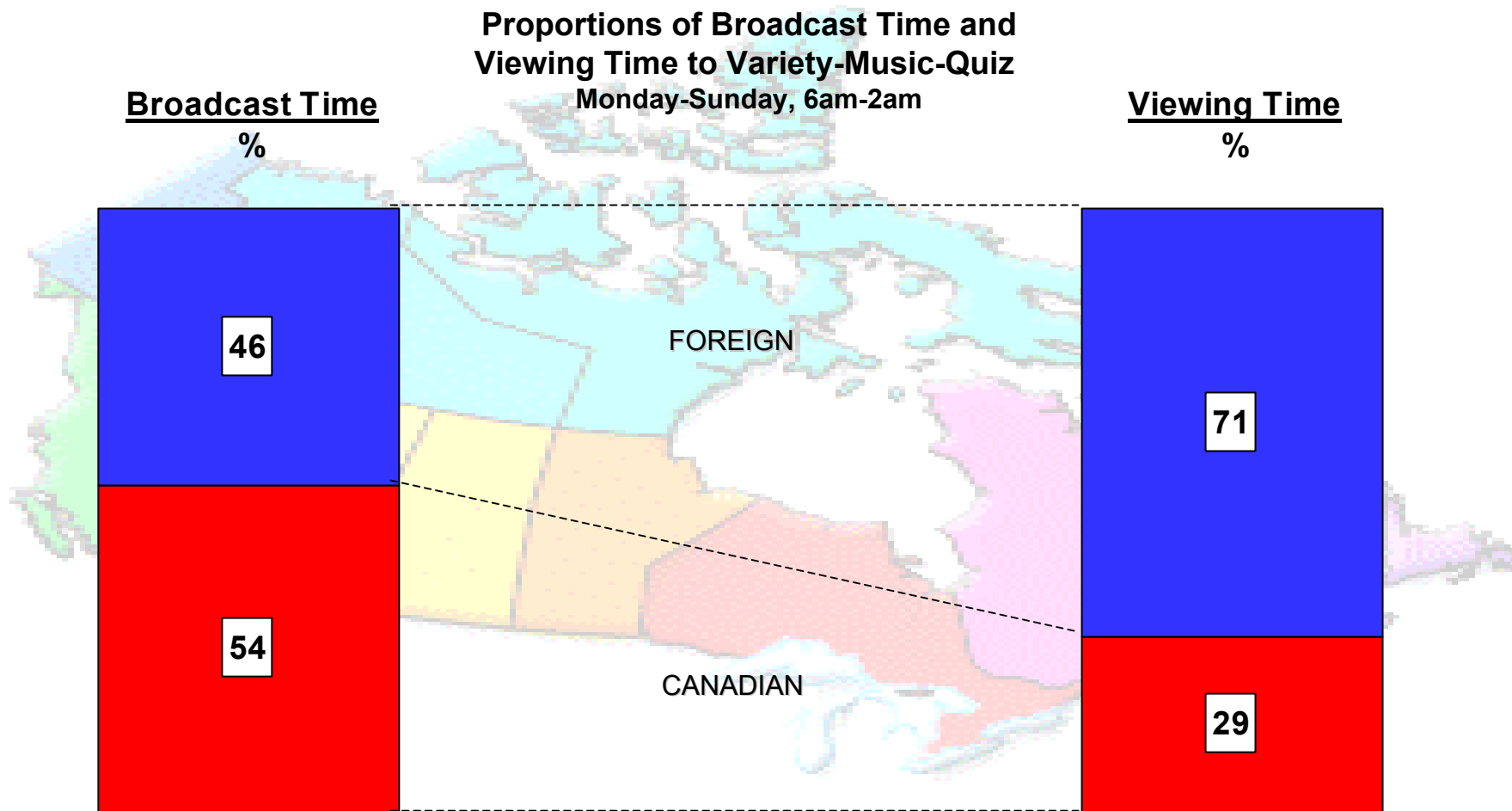
DRAMA/COMEDY

Foreign programs dominate the viewing of drama/comedy. For every hour of Canadian drama/comedy viewed on English TV, 10 hours of foreign drama/comedy are viewed.



VARIETY-MUSIC-QUIZ

Foreign programs also dominate the audience to variety/music programs on English TV, accounting for 71 per cent of all viewing to that program type.



DRAMA/COMEDY

Foreign programs dominate the viewing of drama/comedy programs on French TV, accounting for three-quarters of all viewing to such programs.

