



# Canadian Viewing Profiles

November 2023



# Introduction and Methodology

This report looks at the different viewing profiles of Canadians based on self-reported MTM TV/video viewing data. The following pages describe each of the identified viewing profiles based on their demographics, their viewing habits and their subscription to various services.



# The Segments

Traditionals	Testers	Hybrids	Have It Alls	Online First
14%	17%	15%	21%	31%
90% or more of their viewing time is spent with traditional platforms	60% to 90% of their viewing time is spent with traditional platforms	Their viewing time is evenly split (40% to 60%) between traditional and new platforms	60% to 90% of their viewing time is spent with online platforms and SVOD services	90% or more of their viewing time is spent with online platforms and SVOD services
<p>These viewers mainly watch TV and video content on a TV set through a paid TV subscription service (e.g. cable, satellite).</p> <p>This segment has been declining. At one time it was the largest segment, but as people have moved towards online platforms they now account for only 14% of the Canadian population.</p>	<p>These viewers still rely heavily on traditional platforms but are starting to access some of their content on SVOD* services and online.</p> <p>They account for 17% of the Canadian population.</p>	<p>These viewers will choose the platform that best suits their needs at the time.</p> <p>They account for 15% of the Canadian population.</p>	<p>The vast majority (8 in 10) of these viewers subscribe to a paid TV service and to an SVOD service.</p> <p>They account for 21% of the Canadian population.</p>	<p>These viewers mainly watch TV and video content online or through an SVOD subscription (e.g. Netflix).</p> <p>With the growth in content available online via YouTube and SVODs, this has become the largest segment. They account for 31% of the Canadian population.</p>
<b>Heavy viewers and light listeners</b>	<b>Heavy viewers and average listeners</b>	<b>Heavy viewers and average listeners</b>	<b>Average viewers and heavy listeners</b>	<b>Light viewers and heavy listeners</b>
29.3 hrs/wk of video	29.6 hrs/wk of video	29.7 hrs/wk of video	27.0 hrs/wk of video	21.4 hrs/wk of video
13.1 hrs/wk of audio	15.3 hrs/wk of audio	16.1 hrs/wk of audio	19.2 hrs/wk of audio	20.0 hrs/wk of audio

Note: The time spent with audio content includes radio and the time spent with video content includes online TV.

\* SVOD is an acronym for "Subscription Video on Demand" and refers to video and television content that is accessed through Internet rather than from a service provider's own dedicated network. Netflix, Amazon Prime Video, Disney+, Crave, and Club Illico are a few SVOD service providers.

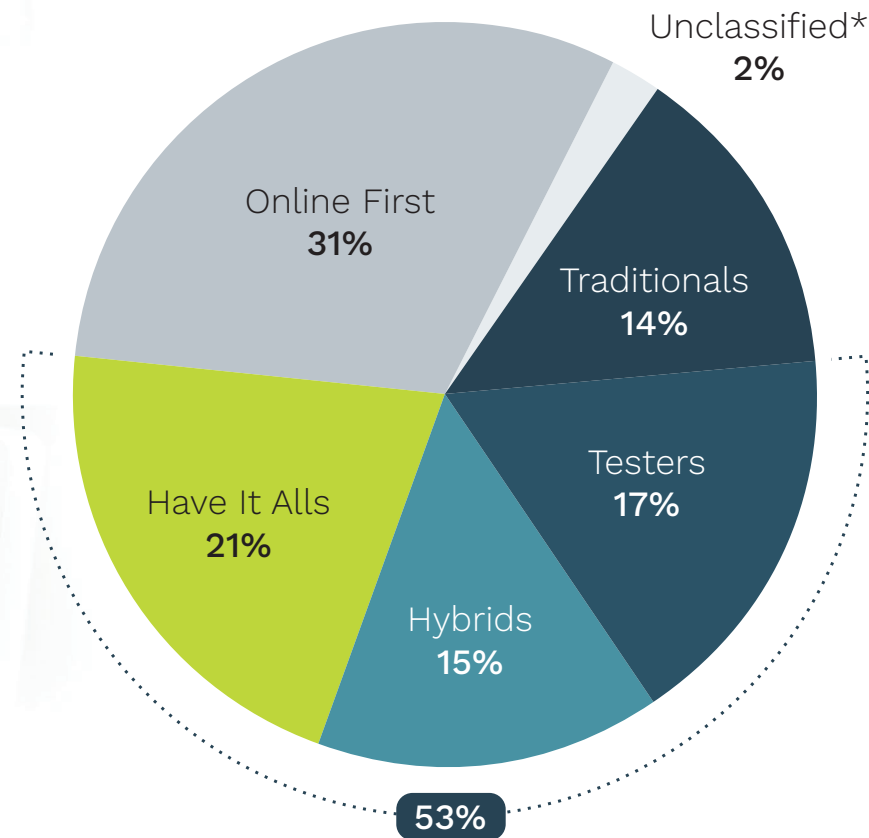


# What Canadians Watch

More than half of all Canadians watch a combination of traditional and online content

## Segment Distribution Within Canada

Canadians 18+

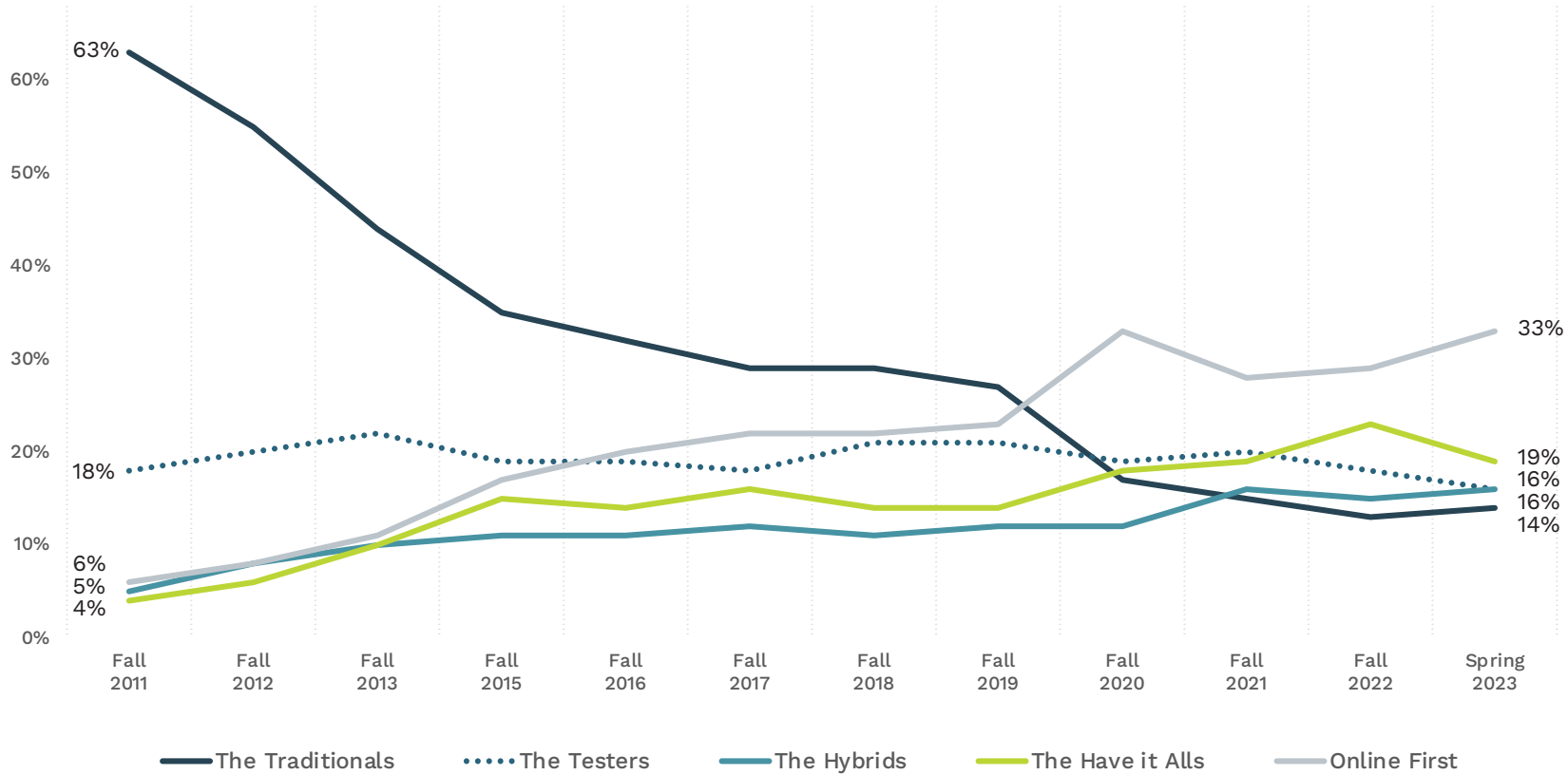


\*Respondents who did not provide viewing hours.

# Changing Segments

The size of these segments has been changing over the past years.

The Traditionals segment has declined significantly over time, while the Hybrids, Have It Alls and Online First groups have grown.



\*For the remainder of this report, we will be looking at the penetration from the combined 2022-2023 dataset

# The Traditionals

The Traditionals spend 90% or more of their time viewing TV and video content on a TV set through a paid TV subscription service (e.g. cable, satellite).

As more and more content is available online – sometimes exclusively – fewer Canadians are getting nearly all of their video content via traditional means. This size of this segment has decreased to 14% in 2022-2023.



## More Likely to



Be female



Be older - average age 67



Live in small communities or rural settings



Have a lower average household income



Over index in the French market



Be less educated (high school education or less)

## Media Usage

### TV/Video

- They are average viewers: 29.3 hrs/wk of TV/video content\*.
- 94% subscribe to a TV service.
- Only 1% opt for TV My Way\*\*.
- Least likely segment to subscribe to an SVOD (38%). Nearly half of those who do subscribe to an SVOD only subscribe to 1 service.
- 53% of traditional watch content on AVODs.

### Audio

- They are light radio/audio listeners: 13.2 hrs/wk\*.
- They report 76% of their audio time is using terrestrial radio.
- 38% of Traditionals listen to online audio content. Streaming music services are their biggest go-to for online audio.
- 8% listen to podcasts.

### Online and Other

- A quarter of Traditionals say they don't use the Internet at all.
- On average Traditionals report spending 13.9 hours per week online, lowest among all segments.
- Canadian news channels are important to this group (75% watched past month). Online news is less important, but nearly half of Traditionals read news content online.

\*MTM data shows that the average Canadian reports consuming 27.0 hrs of video/TV, 17.8 hrs of audio/radio and 31.0 hrs of Internet in a typical week.

\*\*TV My Way refers to people who do not subscribe to a paid TV service (e.g. cable, satellite) or receive over the air signals at home but consume TV almost exclusively online.

# The Testers

The Testers still rely heavily on traditional platforms but are starting to access some of their content through SVOD services and online - 60% to 90% of their viewing time is spent with traditional platforms.

This segment represents 17% of the Canadian population and has remained relatively stable in size over time.



## More Likely to



Be middle aged - average age 57



Have an average household income or approximately \$84K



Over index in the French market

## Media Usage

### TV/Video

- They are above average video viewers: 29.6 hrs/wk of TV/video content\*.
- 95% subscribe to a TV service.
- 2% opt for TV My Way\*\*.
- 86% subscribe to at least one SVOD service. 73% of those subscribers have two or more services.
- Nine Testers in ten watch AVOD services.

### Audio

- They are average audio listeners: 15.3 hrs/wk radio/online audio content\*.
- Testers also use a mixture of terrestrial radio and online audio content, but similar to their TV habits, they still lean more towards traditional radio. Three fifths of their audio listening (60%) is done via terrestrial radio.
- Four in five listen to online audio content, with streaming music services being a popular source (57%).
- A third of Testers stream AM/FM radio content online, which along with Have It Alls is the highest among the segments.
- A quarter of Testers listen to podcasts.

### Online and Other

- Report spending 25 hours a week online.
- 80% use social networks.
- Most likely segment to watch a sports specialty channel (59%).
- High usage of both TV news specialty channels (73%) and online news (81%).

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\*\*TV My Way refers to people who do not subscribe to a paid TV service (e.g. cable, satellite) or receive over the air signals at home but consume TV almost exclusively online.

# The Hybrids

The Hybrids split their viewing time evenly (40%-60%) between traditional and new platforms, choosing the one that best suits their needs for the occasion.

Making up the smallest proportion of Canadian viewers, Hybrids represent just 15% of the population.



## More Likely to



~50

Be middle aged – average age 50



~\$101K

Have a high average household income



<17%

Have teens at home



12%

Less likely to consider themselves as persons living with disabilities



16%

Be racialized Canadians

## Media Usage

### TV/Video

- Report watching high levels of TV/video content at 29.7 hrs/wk\*.
- 88% subscribe to a TV service, however we also see that 7% opt for TV My Way\*\*.
- 94% subscribe to at least one SVOD service, and 60% of those subscribers have three or more services.

### Audio

- They are average listeners at 16.1 hrs/wk of radio/audio content\*.
- They are equally likely to access audio both on traditional radio (87%) and online platforms (88%) – and their time is split nearly evenly between the two.
- 73% listen to streaming music services and 40% listen to podcasts.

### Online and Other

- Hybrids report spending 31.0 hrs/wk on average accessing the Internet\*.
- Hybrids are among the most likely to own Internet-capable devices, but are not necessarily engaging in as many online activities as are Have It Alls and Online Firsts.
- 84% of Hybrids read online news, and 65% watch news clips or programs online. That being said, TV remains an important source of news for this group, as 67% watch Canadian TV news channels.

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\*\*TV My Way refers to people who do not subscribe to a paid TV service (e.g. cable, satellite) or receive over the air signals at home but consume TV almost exclusively online.



# Have It Alls

The Have It Alls have started to rely more heavily on digital platforms for their TV and video content (60% to 90%), but traditional platforms aren't gone completely from their viewing habits. With the vast majority of this group subscribing to a paid TV service (e.g. cable or satellite) AND an SVOD service, they truly Have It All!

Have It Alls account for 21% of the Canadian population and are one of the fastest growing segments, nearly quadrupling since 2011-2012 (5%).



## More Likely to



~44

Be younger – average age 44



55% in >500K

Live in Canada's largest cities (35% in communities larger than 500K)



~\$102K

Have a high average household income



38%

Have children under 18 at home



16%

Self-identify as a member of a Racialized group

## Media Usage

### TV/Video

- They are above average viewers: They are above average viewers, watching 27.0 hrs/wk of TV/video content.\*
- 75% subscribe to a TV service, and an additional 11% get TV signals off-air. 14% opt for TV My Way.
- 95% are SVOD subscribers. 62% of Have It Alls subscribe to 3 or more services, which is the highest of all segments. 97% watch AVOD content.

### Audio

- As above average listeners, they spend 19.2 hrs/wk with radio/audio content, but they also report spending a greater proportion of time listening to audio online than via traditional radio\*.
- While radio still is very popular with this segment (82%) they are more likely to be listening to audio content online (94%). Nearly a third of Have It Alls stream AM/FM radio content online.
- This segment, along with Online Firsts, is the most likely group to listen to music on YouTube (73%).
- They are the most likely to listen to a streaming music service (80%). 44% of Have It Alls are listening to podcasts.

### Online and Other

- This tech heavy group is more likely to own connected technologies than any other segment.
- 86% of Have It Alls read online news, while 75% watch news video clips or programs. TV news is still important – 65% watch Canadian TV news channels.
- As a result, they are heavy users of the Internet: 36.2 hrs/wk.\*

\*MTM data shows that the average Canadian reports consuming 27.0 hrs of video/TV, 17.8 hrs of audio/radio and 31.0 hrs of Internet in a typical week.

\*\*TV My Way refers to people who do not subscribe to a paid TV service (e.g. cable, satellite) or receive over the air signals at home. They consume TV almost exclusively online.

# Online First

The Online First segment spends 90% or more of their time viewing TV and video content through online platforms like YouTube and SVOD services like Netflix, Amazon Prime Video, or Disney+.

Online First has become the largest segment comprising 31% of Canadians. With the growth in number and popularity of SVODs it has become increasingly possible to get the TV and video content that you want without watching traditional TV.



## More Likely to



**~40**  
Be younger – average age 40, which is the youngest of all segments



Have children aged 18 or younger in the home



**55% in >100K**  
Live in large urban centres



**\$97K**  
Have a moderate to high household income



Be Anglophone



Be born outside of Canada (22%) – 4% having arrived in the past 5 years

## Media Usage

### TV/Video

- This group consumes the least amount of TV/video content – 21.4 hrs/wk\*
- Only 33% subscribe to a TV service, but another 8% of Online Firsts get TV signals off-air. Nearly a quarter are “Cord Nevers” – never having subscribed to a TV service.
- 54% opt for TV My Way\*\*
- 91% are SVOD subscribers, while 53% of all Online Firsts subscribe to 3 or more services.
- Online Firsts report watching 9.1 hours a week of YouTube, more than any other segment.

### Audio

- Online Firsts listen to 20.0 hours of audio content, the most of any of the segments. Most of their listening is spent online\*.
- Streaming music services are the most popular source for online audio (77%) with YouTube close behind (74%). They are the most likely segment to listen to podcast content (54%).
- While members of this group are heavy online audio listeners, 76% also listen to traditional radio as well.

### Online and Other


- Online Firsts are spending considerable amounts of time online through media consumption – 41.3 hrs/wk.\*
- 88% visit social networking sites, and 88% read online news.
- This segment is the least interested in sports content, only 14% say they watch a TV sports channel while only 6% watch sports streaming services.

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\*\*TV My Way refers to people who do not subscribe to a paid TV service (e.g. cable, satellite) or receive over the air signals at home. They consume TV almost exclusively online.



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