



Canadian Viewing Profiles

November 2018



Introduction and Methodology

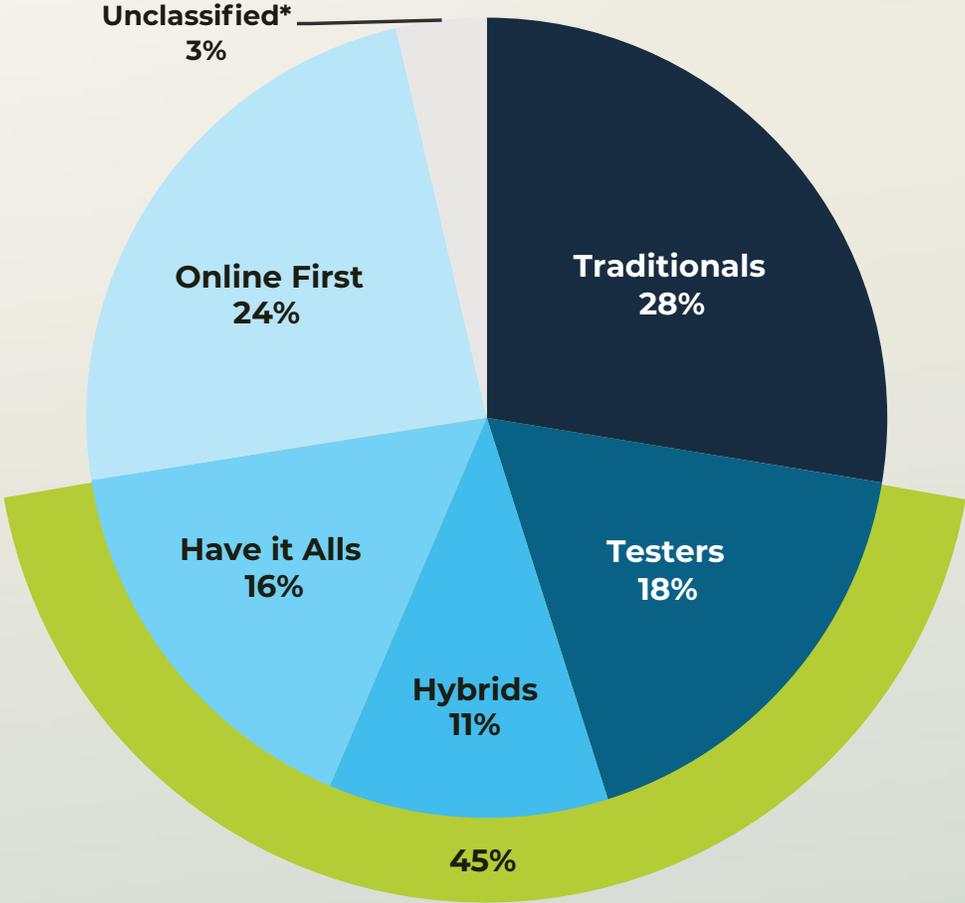
There is interest in the industry to understand how different audiences connect with media content and interact with CBC/Radio-Canada. This report looks at the different viewing profiles of Canadians based on self-reported MTM TV/video viewing data. The following pages describe each of the identified viewing profiles based on their demographics, their viewing habits, their subscription to various services and their use of CBC/Radio-Canada.

The Segments

| Traditionals | Testers | Hybrids | Have it Alls | Online First |
|--|---|---|---|--|
| 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 between traditional and new platforms | 60% to 90% of their viewing time is spent with online platforms and OTT services | 90% or more of their viewing time is spent with online platforms and OTT services |
| <p>These viewers mainly watch TV and video content on TV set through a paid TV subscription service (e.g. cable, satellite).</p> <p>This is the largest segment, they account for 28% of the Canadian population.</p> <p>This segment has decreased drastically over time (going from 59% to 28% between 2011 and 2018 - a decrease of 53%).</p> | <p>These viewers still rely heavily on traditional platforms but are starting to access some of their content on OTT services and online.</p> <p>They account for 18% of the Canadian population.</p> <p>This segment has remained relatively stable over time.</p> | <p>These viewers will choose the platform that best suits their needs at the time.</p> <p>This segment is the smallest in proportion. They account for 11% of the Canadian population.</p> <p>This segment has nearly doubled over time (going from 6% to 11% between 2011 and 2018).</p> | <p>The vast majority (8 in 10) of these viewers subscribe to a paid TV service and to an OTT service.</p> <p>They account for 16% of the Canadian population.</p> <p>This is one of the fastest growing segments. It has tripled over time (going from 5% to 16% between 2011 and 2018).</p> | <p>These viewers mainly watch TV and video content online or through an OTT subscription (e.g. Netflix).</p> <p>They account for 24% of the Canadian population.</p> <p>This is the fastest growing segment. It has quadrupled over time (going from 6% to 24%).</p> |
| Heavy viewers and light listeners | Average viewers and lighter listeners | Heavy viewers and lighter listeners | Average viewers and heavy listeners | Light viewers and heavy listeners |
| 22.5 13.6 hrs/ week of video hrs/ week of audio | 20.4 15.3 hrs/ week of video hrs/ week of audio | 22.7 15.8 hrs/ week of video hrs/ week of audio | 19.8 17.9 hrs/ week of video hrs/ week of audio | 15.3 19.1 hrs/ week of video hrs/ week of audio |

Nearly half of all Canadians watch a combination of traditional and online content

Segment Distribution Within Canada
Canadians 18+ | %

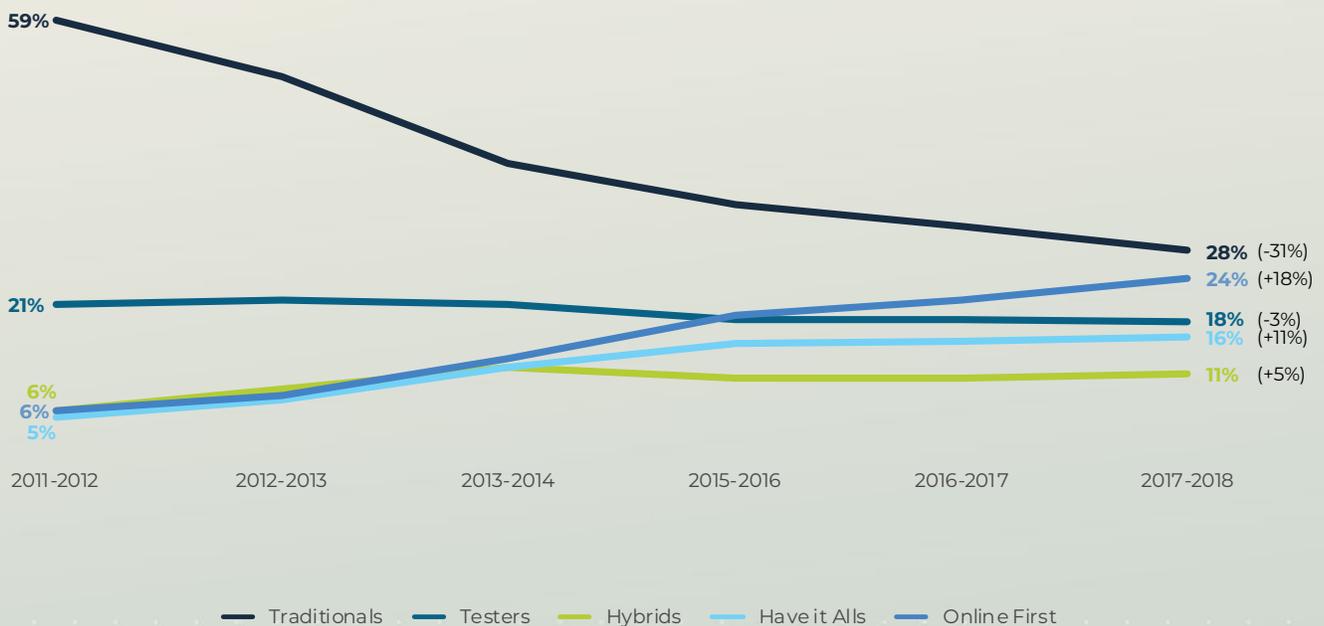


*Respondents who did not provide viewing hours.



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

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





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).

Representing 28% of the Canadian population, the Traditionals make up the largest segment of viewers. Over time, however, this segment has decreased dramatically - down from 59% in 2011-12.

They are more likely to :

- be female (58%)
- be older – average age 61
- live in rural communities or smaller cities (<100K population) (38%)
- have a lower average household income (\$50K)
- over index in the French market

Media Usage



TV/Video

- They are heavy viewers: 22.5 hrs/wk of TV/video content**
- 94% subscribe to a TV service
- Less than 1% are TV My Way*
- 24% subscribe to at least one OTT service



Audio

- They are light radio/audio listeners: 13.6 hrs/wk**
- 80% of their audio listening is done on traditional platforms
- Only 35% stream audio content and only 2% pay for a streaming music service
- 5% listen to podcasts



Online and Other

- 66% accessed Internet and they are light users at just 9.6hrs/wk**
- 49% access social networking sites
- They are the least likely segment to read online news (49%) but the most likely to have a paid subscription to a newspaper (26%)



CBC/Radio-Canada

- CBC/RC services reach 88% of Traditionals
- 8 in 10 watch CBC/RC TV and close to half (46%) access our content ONLY through traditional TV
- More likely to be heavy viewers of CBC/RC TV (21%) (over 7 hrs/wk)
- Less likely than other segments to use our digital services but 1 in 5 (22%) access CBC/RC online news

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

**MTM data shows that the average Canadian reports consuming 19.9hrs of video/TV, 16.9hrs of audio/radio and 22.6hrs/wk of Internet in a typical week.

The Testers

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

This segment represents 18% of the Canadian population and has remained relatively stable in size over time.

They are more likely to :

- skew slightly female (53%)
- be middle aged - average age 50
- reflect the general population in terms of community size
- have an average household income of \$72K
- over index in the French market
- have children under 18 at home (32%)

Media Usage



TV/Video

- They are average viewers: 20.4 hrs/wk of TV/video content**
- 93% subscribe to a TV service
- 2% are TV My Way*
- 59% subscribe to at least one OTT service



Audio

- They are lighter listeners: 15.3 hrs/wk radio/audio content**
- Over 60% of their audio listening is done on traditional platforms
- Close to 80% stream audio content and 7% pay for a streaming music service
- Close to 1 in 5 (18%) listen to podcasts



Online and Other

- While not as tech savvy as the more online segments, they are more likely than the Traditionals to own media technology and they spend twice as much time online: 19.9hrs/wk**
- 8 in 10 access social networking sites
- 81% read online news and 19% have a paid subscription to a newspaper

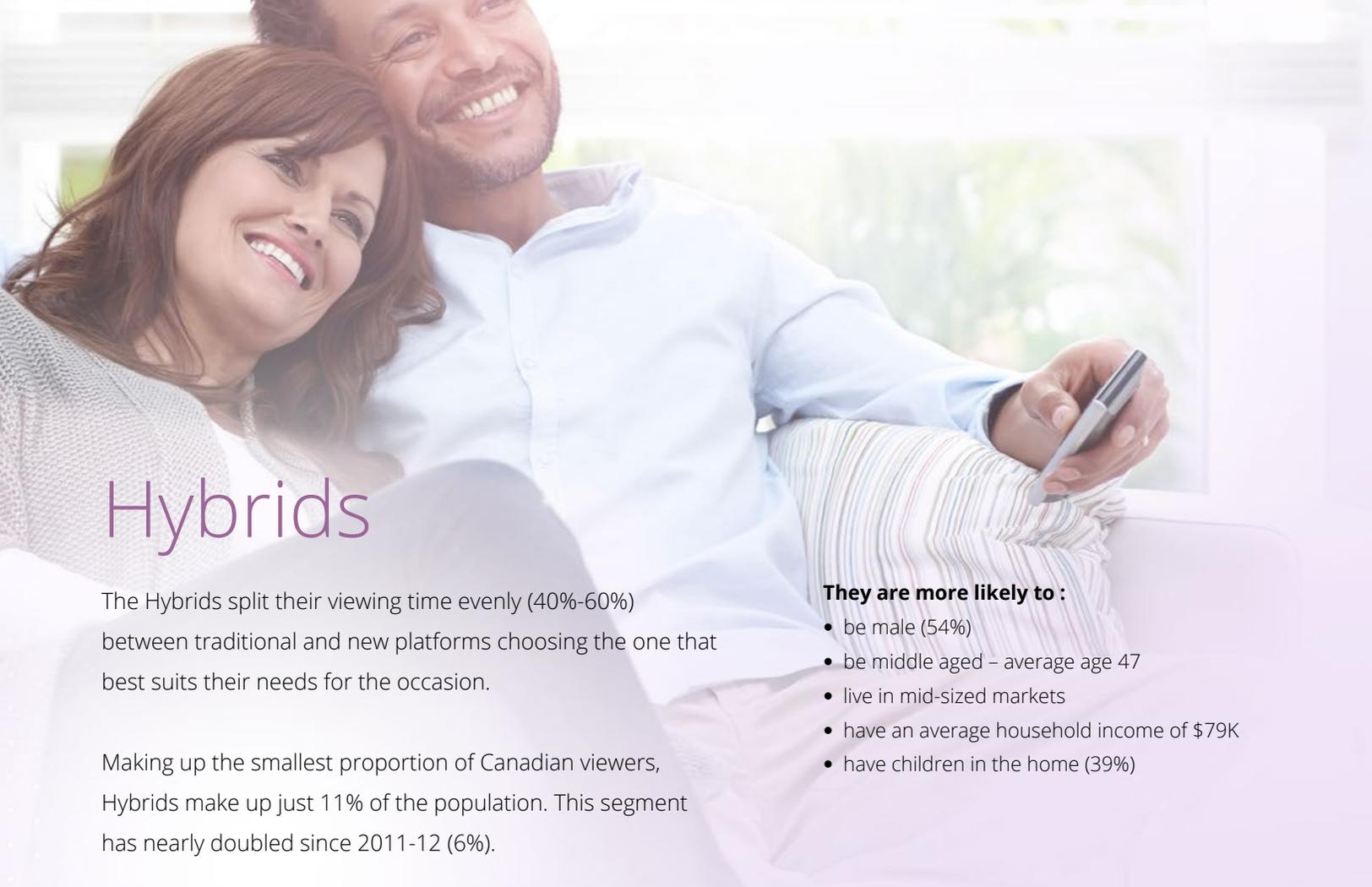


CBC/Radio-Canada

- CBC/RC services reach 89% of Testers
- 8 in 10 Testers watch CBC/RC TV, and nearly a quarter (23%) access us on all three platforms – TV, radio, digital
- 11% are heavy viewers of CBC/RC TV (over 7 hrs/wk)
- 44% access CBC/RC news online
- 36% listen to our podcasts

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

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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 make up just 11% of the population. This segment has nearly doubled since 2011-12 (6%).

They are more likely to :

- be male (54%)
- be middle aged – average age 47
- live in mid-sized markets
- have an average household income of \$79K
- have children in the home (39%)

Media Usage



TV/Video

- They are heavy viewers: 22.7 hrs/wk of TV/video content*
- 84% subscribe to a TV service
- 74% subscribe to at least one OTT service



Audio

- They are lighter listeners at 15.8 hrs/wk of radio/audio content*
- They access radio and audio on both traditional (92%) and new platforms (85%)
- 9% pay for a streaming music service and nearly a quarter (23%) listen to podcasts



Online and Other

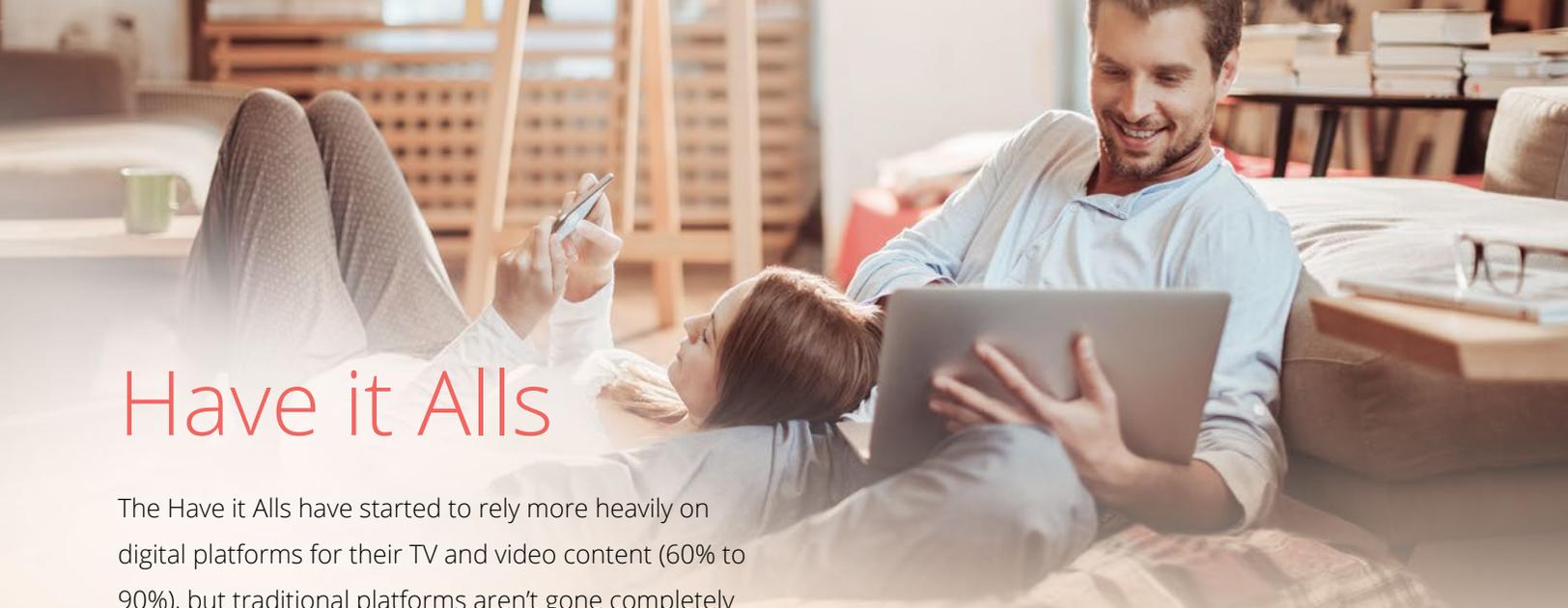
- Hybrids fall squarely in the middle of all of the segments when it comes to adopting new technologies and online behaviours. They spend approximately 24.8hrs/wk accessing the Internet*
- 83% visit social networking sites and read online news
- Newspaper subscriptions are still fairly high at 18%



CBC/Radio-Canada

- CBC/RC services reach 89% of Hybrids
- 73% of Hybrids watch CBC/RC TV
- One of the most likely segments to reach us on all three of our platforms – TV, radio and digital - 27%
- More likely than any other segment to be listening to CBC/RC radio – 41%
- Heavier users of CBC/RC digital services than most other segments as well: online news (46%), podcasts (45%), online TV (28%)

*MTM data shows that the average Canadian reports consuming 19.9hrs of video/TV, 16.9hrs of audio/radio and 22.6hrs/wk of Internet in a typical week.



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 OTT service they truly Have it All!

Have it Alls account for 16% of the Canadian population and are one of the fastest growing segments, tripling since 2011-12 (5%).

They are more likely to :

- be male (53%)
- be younger – average age 39
- live in large urban centres of 1 million+ (43%)
- have the highest household income of any segment - \$84K (and 1 in 5 making over \$150K)
- skew Anglophone

Media Usage



TV/Video

- They are average viewers: 19.8 hrs/wk watching TV/video content*
- 78% subscribe to a TV service
- 81% subscribe to at least one OTT service



Audio

- As lighter listeners, they spend 17.9 hrs/wk with radio/audio content*
- Are just as likely to access radio through traditional means as on new platforms (90%)
- More likely to listen to podcasts (31%), YouTube (80%) and streaming music services (52%) than any other segment
- They are also more likely to pay for a music streaming service than any other group (13%)



Online and Other

- This tech heavy group is more likely to own connected technologies, access online news (87%), and be social networking (89%) than any other segment
- As a result, they are heavy users of the Internet: 31.3 hrs/wk*
- 14% still have a paid subscription to a newspaper (either in paper or online)



CBC/Radio-Canada

- CBC/RC services reach 85% of Have it Alls
- 7 in 10 watch CBC/RC TV
- One of the most likely segments (27%) to reach us on all three of our platforms – TV, radio and digital
- 38% listen to our radio content
- The most likely segment to access CBC/RC on digital platforms: online news (52%), online TV (30%), podcasts (47%), streaming radio (10%)



Online First

The Online First segment spends 90% or more of their time viewing TV and video content through online platforms and OTT services like Netflix.

Online First accounts for nearly a quarter of the Canadian population (24%) and is the fastest growing segment. This profile has quadrupled since 2011-12 (6%).

They are more likely to :

- be male (54%)
- be in the youngest age category – average age 37
- live in large urban centres of <500K (51%)
- have a lower household income (2nd lowest of any segment) - \$68K
- be Anglophone

Media Usage



TV/Video

- This group consumes the least amount of TV/video content - 15.3 hrs/wk**
- 34% subscribe to a TV service
- 42% are TV My Way*
- 75% subscribe to at least one OTT service



Audio

- They consume the most amount of audio of any group at 19.1 hrs/wk**
- Heavy digital audio listeners, but 83% still listen to traditional radio as well
- 11% pay to subscribe for a streaming music service and a third (31%) listen to podcasts



Online and Other

- Online Firsts are spending considerable amounts of time online through media consumption – 33.2 hrs/wk - but surprisingly, they are not as likely as other digital segments to own Internet connected devices**
- 84% visit social networking sites and read online news
- 9% pay for a newspaper subscription



CBC/Radio-Canada

- CBC/RC services reach 68% of Online Firsts
- Least likely segment to use our traditional TV services (29%) and the most likely to be accessing us solely through our digital platforms (12%)
- Traditional CBC/RC radio is still very popular among Online Firsts – 4 in 10 listen
- 42% access our digital platforms and 43% read CBC/RC online news
- 41% listen to our podcasts

*TV My Way - 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.

**MTM data shows that the average Canadian reports consuming 19.9hrs of video/TV, 16.9hrs of audio/radio and 22.6hrs/wk of Internet in a typical week.