



CANADIANS AGED 18 TO 34 AND CBC/RADIO-CANADA

Prepared by the Enterprise Research Department of CBC/Radio-Canada | September 2018

18-34 represents 23% of the Canadian population



82%

are part of the
workforce (FT/PT)



73%

have some or
completed post
secondary
education



20%

are visible
minorities



42%

live in urban
centers
(1 million +)



\$68,300

average household
income



Young people are heavy users of digital platforms and new media



INTERNET



SOCIAL MEDIA



STREAMING AUDIO



PODCASTING



WATCHED E-SPORTS



ONLINE NEWS



OTT SUBSCRIPTION



STREAMING VIDEO



ONLINE GAMING



PIRATED CONTENT





But they still use traditional services to consume media as well

18-34

18+

53% have a paid TV subscription

73%

92% of them watch traditional TV

96%

They spend **16 hours/week** on average watching traditional TV

27
Hours / week

70% of them listen to traditional radio

70%

They spend **6 hours/week** on average listening to traditional radio

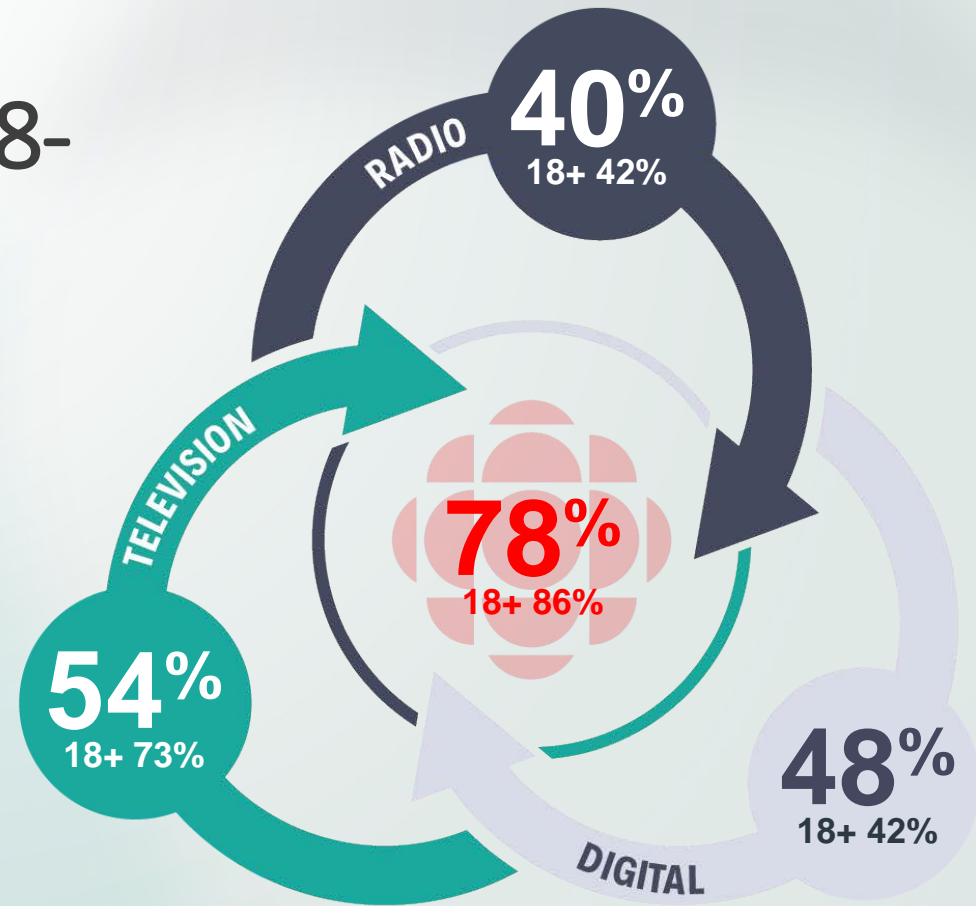
9
Hours / week

9% subscribe to a newspaper (digital or paper)

17%

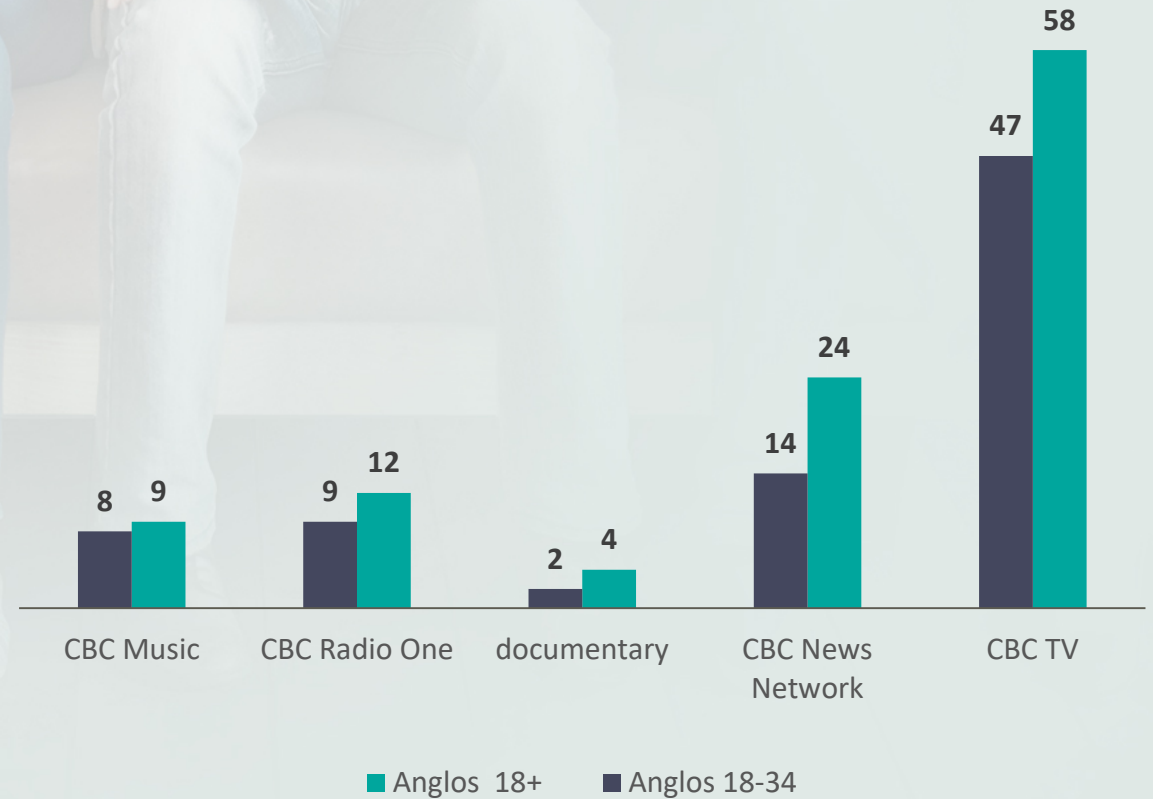
8 out of 10 Canadians aged 18-34 use at least one of CBC/Radio-Canada's services in a typical month

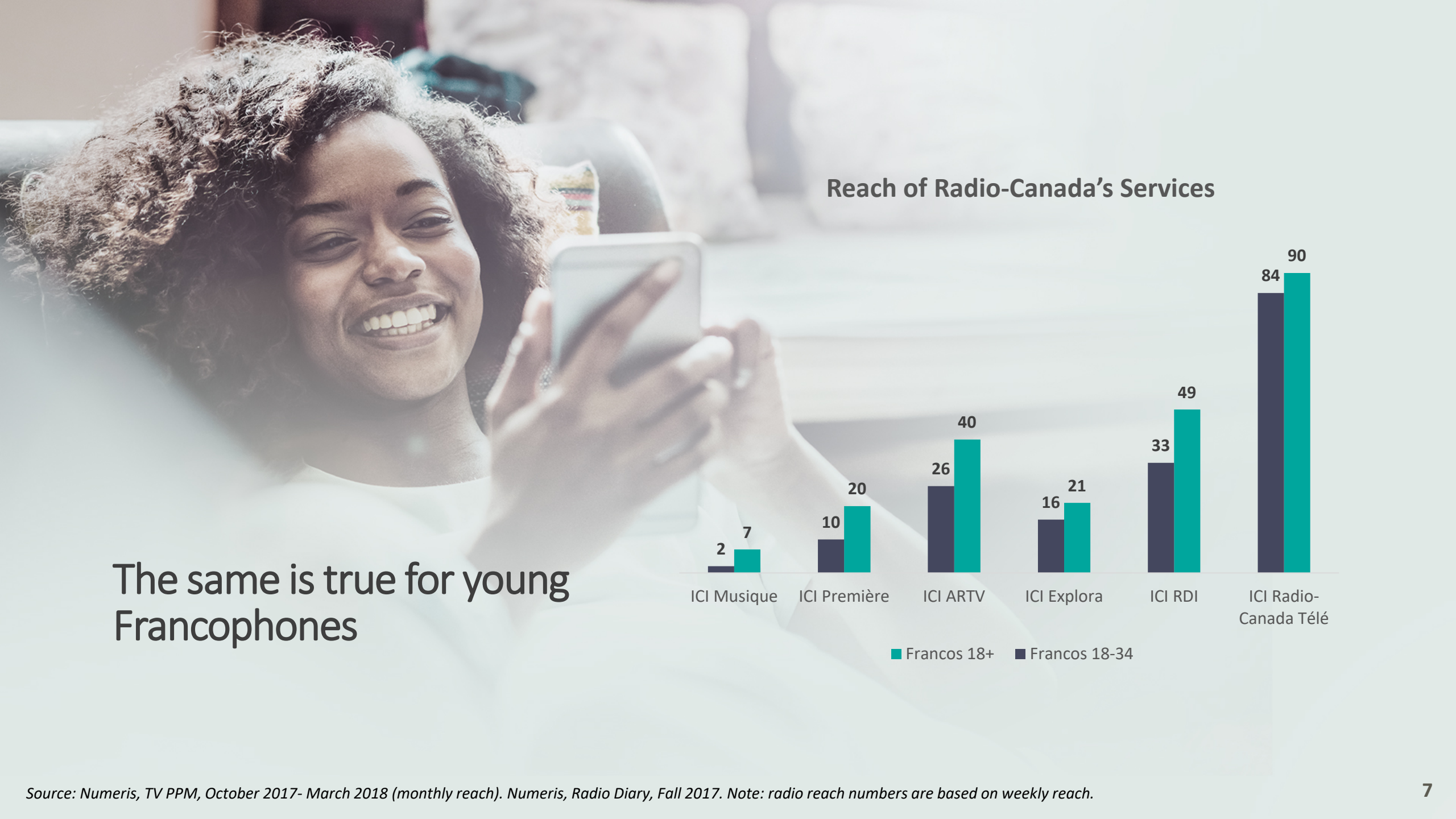
Television remains the top platform followed closely by digital and radio



Reach of CBC's Services

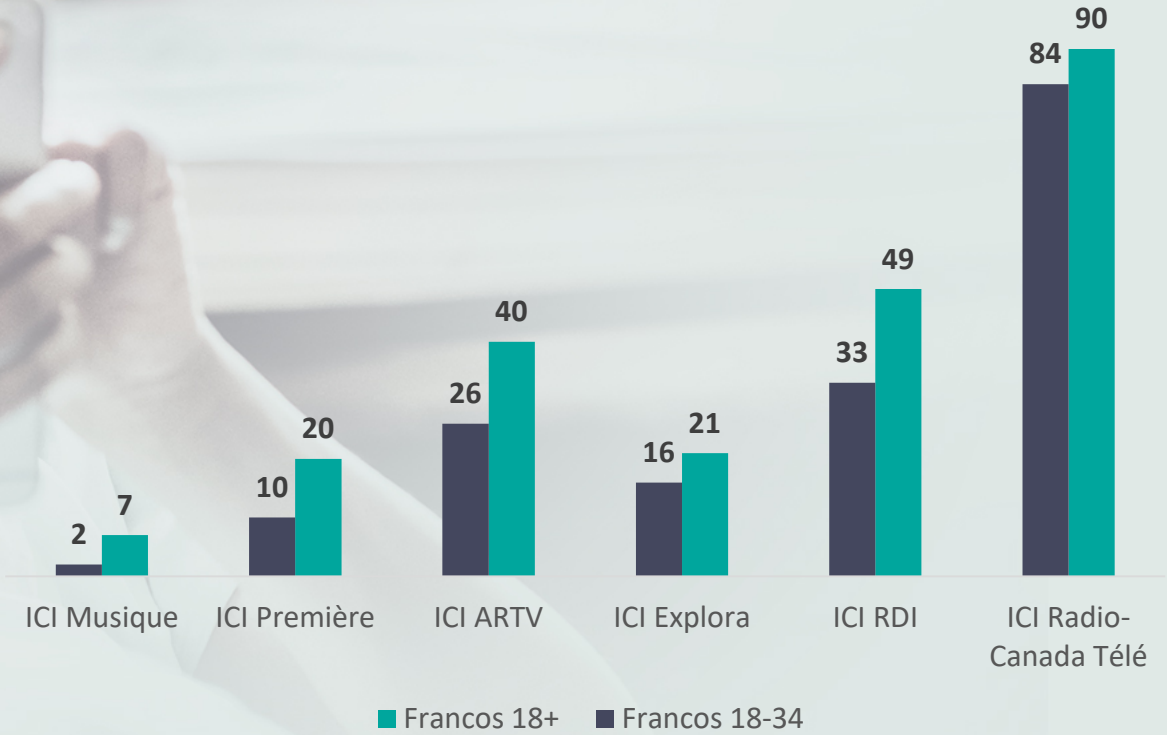
As seen in the media landscape generally, however, 18-34 year olds are slightly less likely to access our services on traditional platforms than the average Anglophone





Reach of Radio-Canada's Services

The same is true for young Francophones

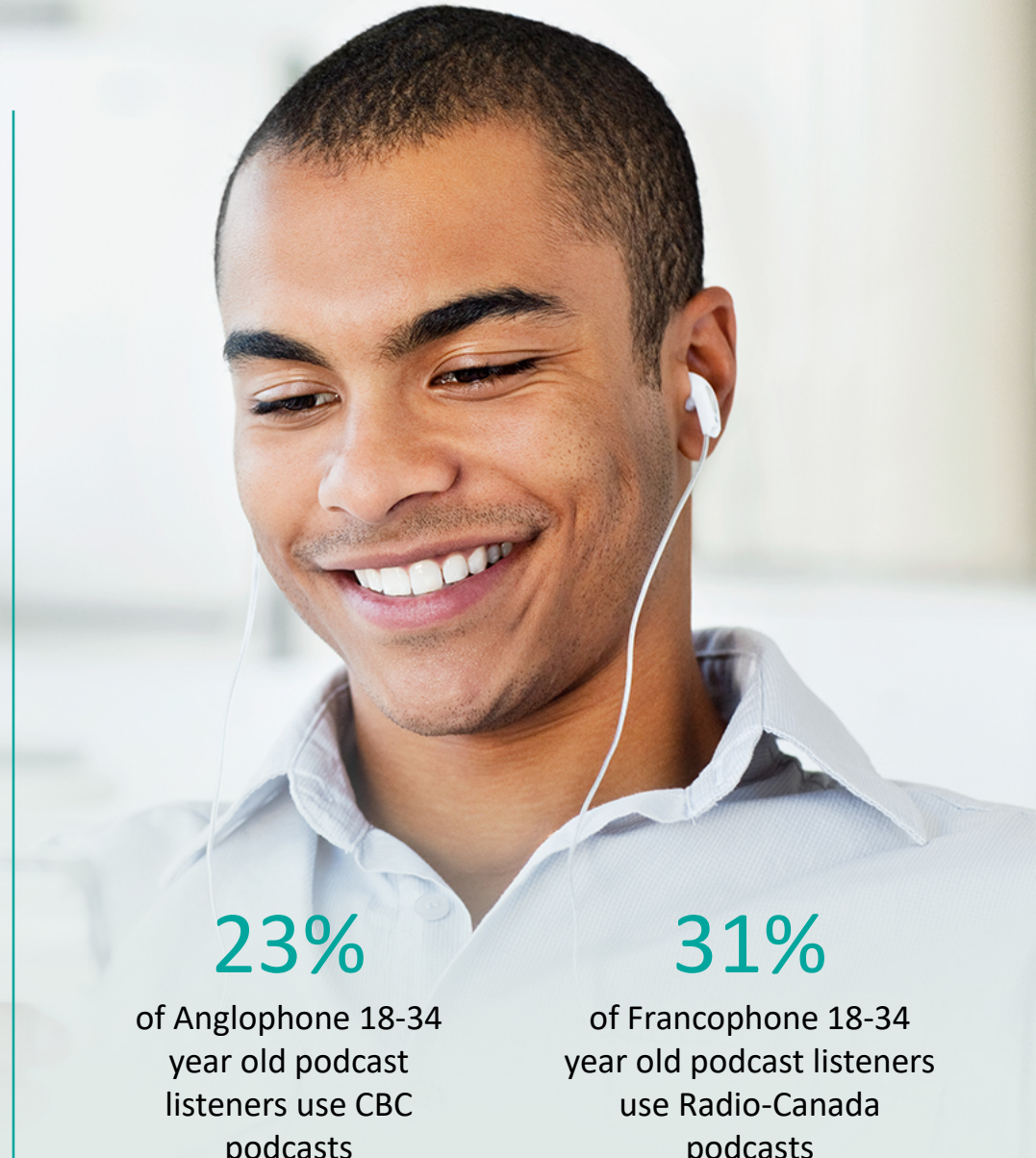
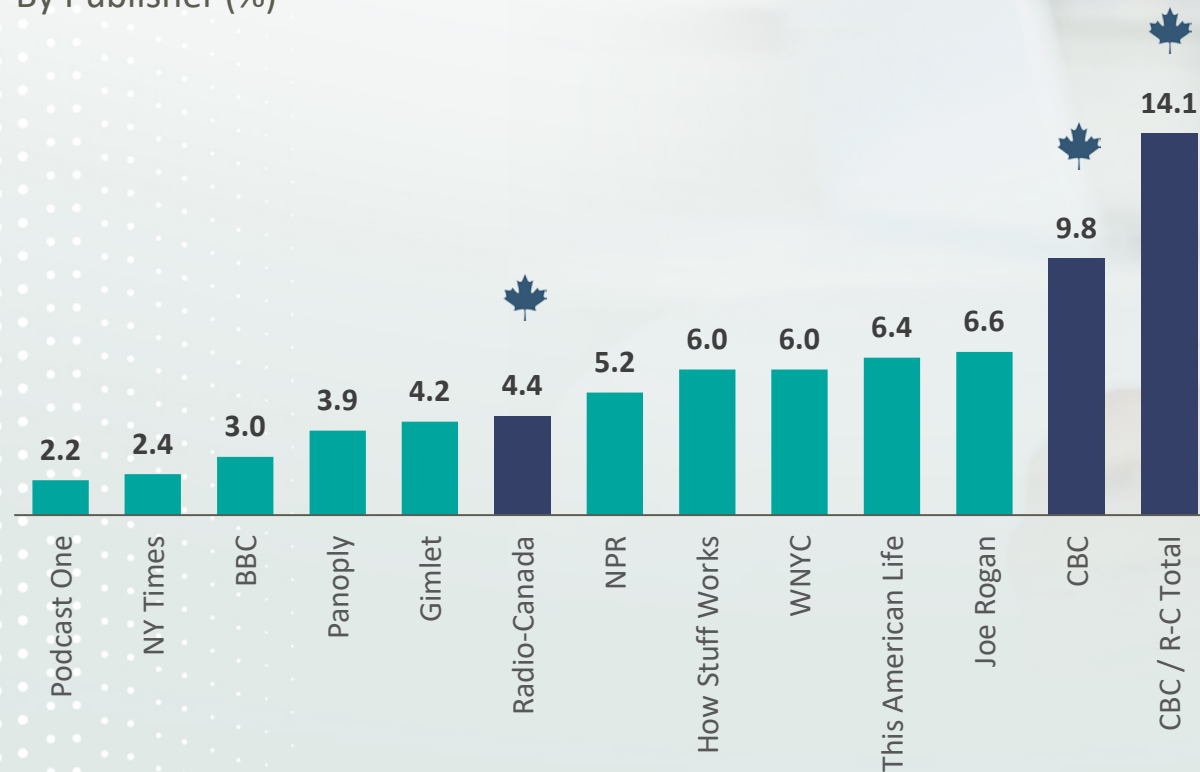


Source: Numeris, TV PPM, October 2017- March 2018 (monthly reach). Numeris, Radio Diary, Fall 2017. Note: radio reach numbers are based on weekly reach.

But they are more likely than other Canadians to be reaching us through digital platforms – like podcasts

Podcasts Listened to by Canadians (18+) in the Past Month

By Publisher (%)



23%

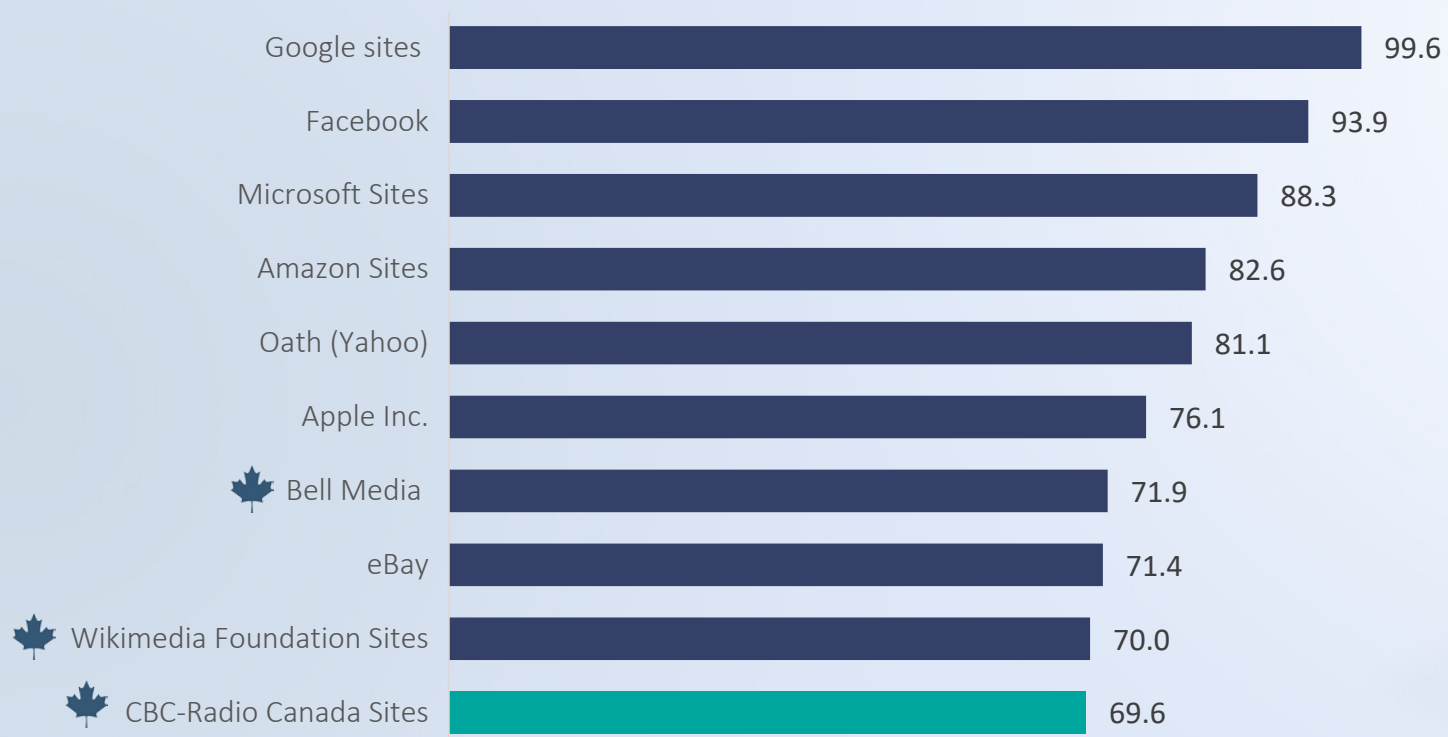
of Anglophone 18-34
year old podcast
listeners use CBC
podcasts

31%

of Francophone 18-34
year old podcast listeners
use Radio-Canada
podcasts

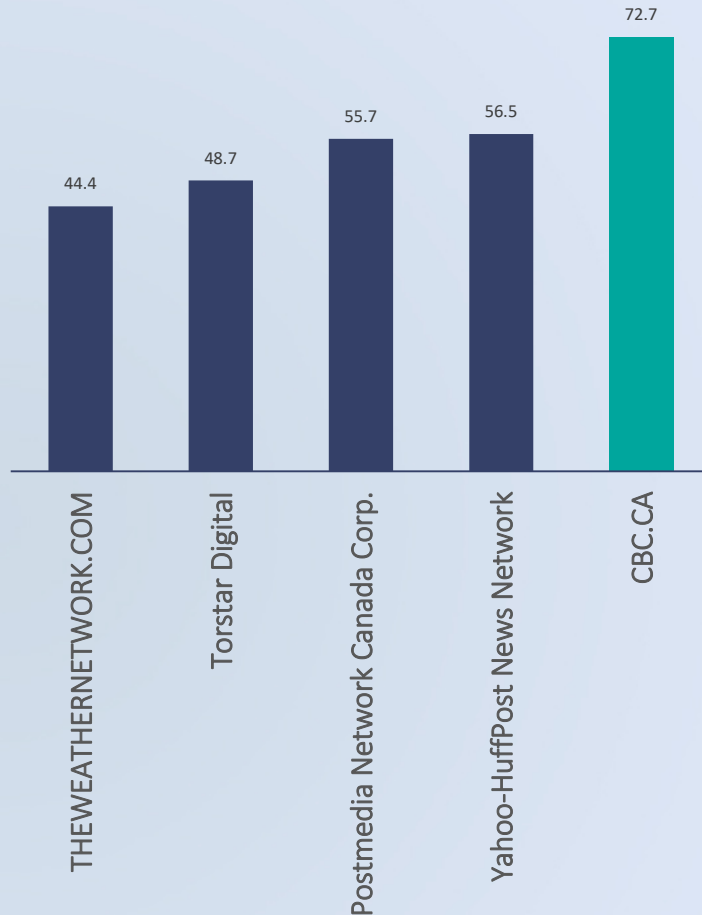
CBC/Radio-Canada is among the most visited web sites by young Canadians

Top Internet Properties for Canadians 18-34
(Reach %)

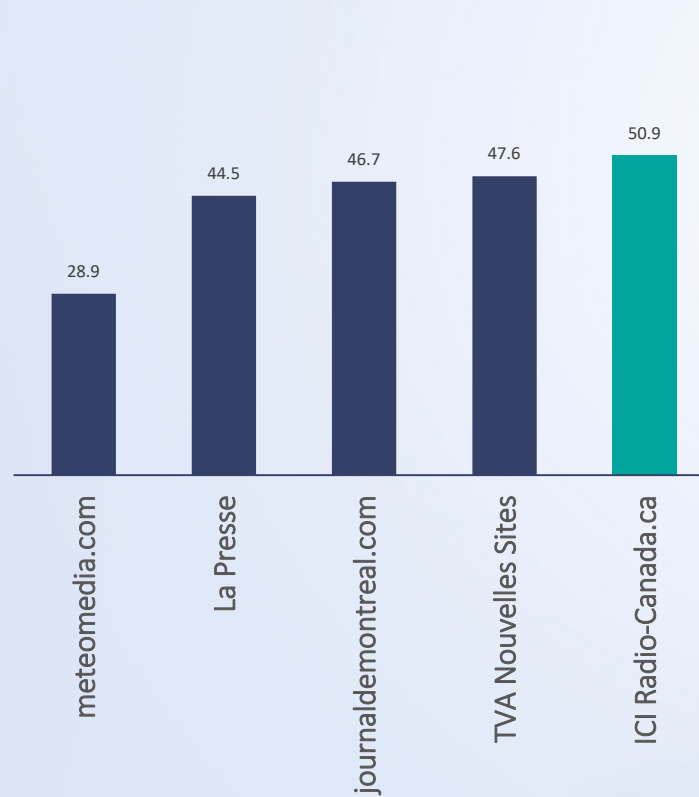


...and when it comes to online news, we are #1

Top English News/Information Sites
Amongst Anglophones 18-34 | Reach %



Top French News/Information Sites
Amongst Francophones 18-34 | Reach %



Source: Comscore MMX® Multi-Platform, Custom-defined ranking including the above properties, Adults 18-34 and Language French/Language Other, Average of Monthly Reach from September 2017 - August 2018, Canada. Note: The custom-defined ranking is based on domain level entities within Comscore's News/Information category. Note: [M] Yahoo-Huff Post News Network based on October 2017 - August 2018.

While Netflix leads the way among OTTs, CBC/Radio-Canada's OTT platforms show strongly against our canadian competitors



CBC Watch reaches **2 times** as many Anglophone 18-34 year old viewers in a typical month as CraveTV

ICI Tou.TV reaches **3 times** as many Francophone 18-34 year old viewers in a typical month as Club illico



Social media is a big part of young people's lives and CBC/Radio-Canada is reaching them there as well

90% of 18-34 year olds have used a social networking site in the past month with 83% having visited facebook.

36%

More than a third of the monthly visitors to the CBC "Gem" facebook page are 18-34 years old – that's approximately **1.6 million** visitors each month.

FACEBOOK.COM/CBC

52%

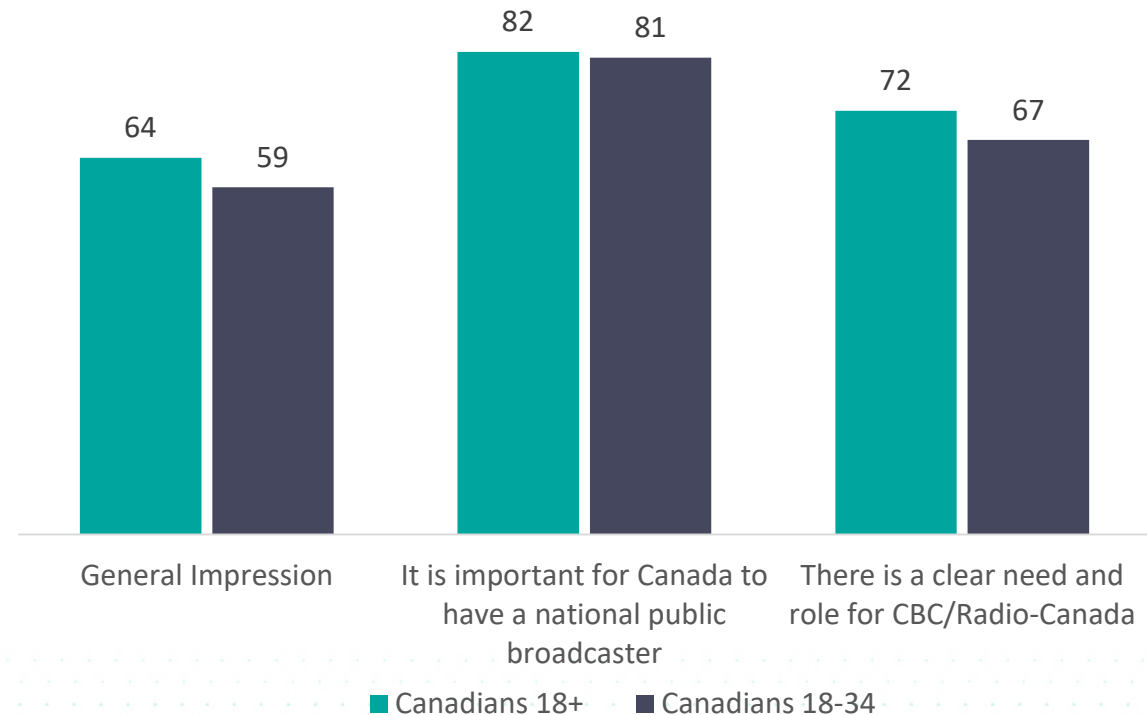
More than half of the monthly visitors to the Radio-Canada Info facebook page are 18-34 years old – that's approximately **3.6 million** visitors each month.

FACEBOOK.COM/RADIOCANADA.INFO

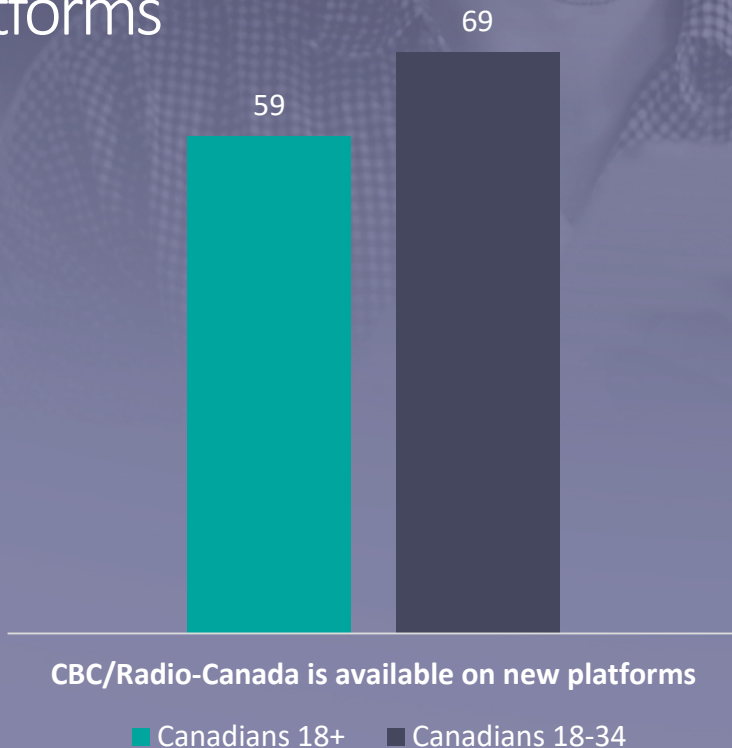
18-34 year olds feel positive towards CBC/Radio-Canada

8 out of 10 Canadians aged 18 to 34 strongly believe that it is important for Canada to have a national public broadcaster and **more than two thirds** of them strongly believe that there is a clear need and role for CBC/Radio-Canada in the future

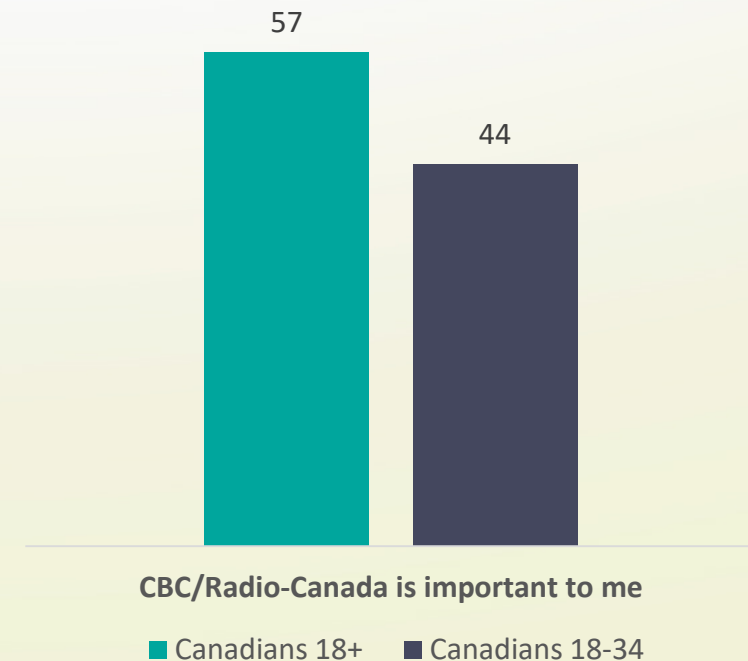
Perception Towards CBC/Radio-Canada



18-34 year olds are more likely to strongly agree that our services are available on new platforms



However, they are less likely to strongly agree that we are important to them...





Corde Sensible

Kim's Convenience

La soirée est encore jeune

New Fire

...so to keep their attention and to continue to engage with them we constantly innovate and continue to develop new products

Innovate using new formats and leveraging new trends

Radio-Canada: Rad, Raif Badawi : Rêver de liberté (ICI Estrie), Corde sensible.

CBC: CBC TV App, Short-Form Series and Social Videos

Developing compelling audio content

Radio-Canada: Génération ailes, balado d'Urbana, La route des 20, La soirée est (encore) jeune

CBC: Alone, On Drugs, New Fire, Campus, Tai Asks Why, Shadowland

Connecting and engaging with younger audiences through events

Radio-Canada: public hackathons, Journée de l'innovation, Jeunes Leaders d'ICI, table ronde pour l'histoire des noirs avec des jeunes à ICI Saskatchewan

CBC: the Digital Meetup, Searchlight contest, CBC Music Festival

Creating TV and video content with young audiences in mind

Radio-Canada: À nous le monde, Jeunes reporters RDV2017

CBC: Schitt's Creek, Kim's Convenience