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# ***The Audience to Television in Canada***

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# Content

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# How the Data is Gathered:

Diaries vs Meters

Active vs Passive

BBM vs Nielsen

# Diaries

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- The original method
- Still used to measure individual markets
- Least expensive method
- Quarter hour is the smallest unit of measurement
- Data are limited to the number of weeks surveyed
- Allows analysis at market/station level
- Are only as accurate and precise as the respondent who filled them out

# Meters

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- First introduced in Canada in 1989
- National/Network level data (except Toronto, Vancouver, Calgary and Montreal are measured as well)
- Expensive technology
- Year-round measurement
- Smallest unit of measurement is one minute
- Relies on household members to push a button when they are watching and when they leave the room

# Active vs Passive

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- Two types of meters
- Active
  - Meter currently in use
  - Requires active intervention of panelist to indicate that they are watching
- Passive
  - Example
    - PPM (personal, portable)
    - Imaging
    - Infrared
  - Respondent not required to do anything

# TV Audience Measurement Methodology

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	<u>Meters</u>	<u>Diaries</u>
Medium:	TV	TV & Radio
Smallest Unit:	minute-by minute	15 minute intervals
Field Dates:	continuous, year-round audience measurement	measure 3 times per year: Fall (4 weeks) Spring (3 weeks) Summer (2 weeks)
Markets:	National Toronto/Ontario Vancouver Calgary Francophone Montreal	Multiple markets
Sample:	6,150 P2+	85,000 P2+

- BBM does the “sweep” diary surveys for Television and Radio. The sample size of the Fall 2003 Television survey was around 80,000.
- Since September, 1998, BBM has been measuring viewing in Vancouver with meters.
- Has introduced market level meter measurement in the provinces of Ontario and Quebec (Francophone) and in Toronto in the past year.
- BBM now has 5,650 panel members across the country.
- National panel commercialized in July 03

- Since 1989, Nielsen has measured audiences across Canada using meters.
- Nielsen boosted its panel sample in response to the introduction of digital channels in September.
- Currently Nielsen measures the television viewing of about 6,150 people, with meters in about 3,150 households.
- Currently measures Toronto, Vancouver, Calgary, and Francophone Montreal markets using meters.
- Provide “overnight” data for Canada, Toronto, Vancouver, Calgary, and Montreal daily.

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# Audience Research Jargon

# Some Terms That are Used in Audience Research

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**VIEWING LEVEL:** The number of people or proportion of a population watching TV


**REACH:** The number of different people who watch any amount

**AVERAGE MINUTE AUDIENCE (AMA) :** The number of people watching in an average minute

**RATING POINTS:** An AMA percentaged on a population, but expressed as a number of points rather than a percentage

**SHARE :** An AMA expressed as a percentage of those watching TV

**COMPOSITION/PROFILE:** An audience broken down by a second variable (e.g. age, gender, occupation, region)

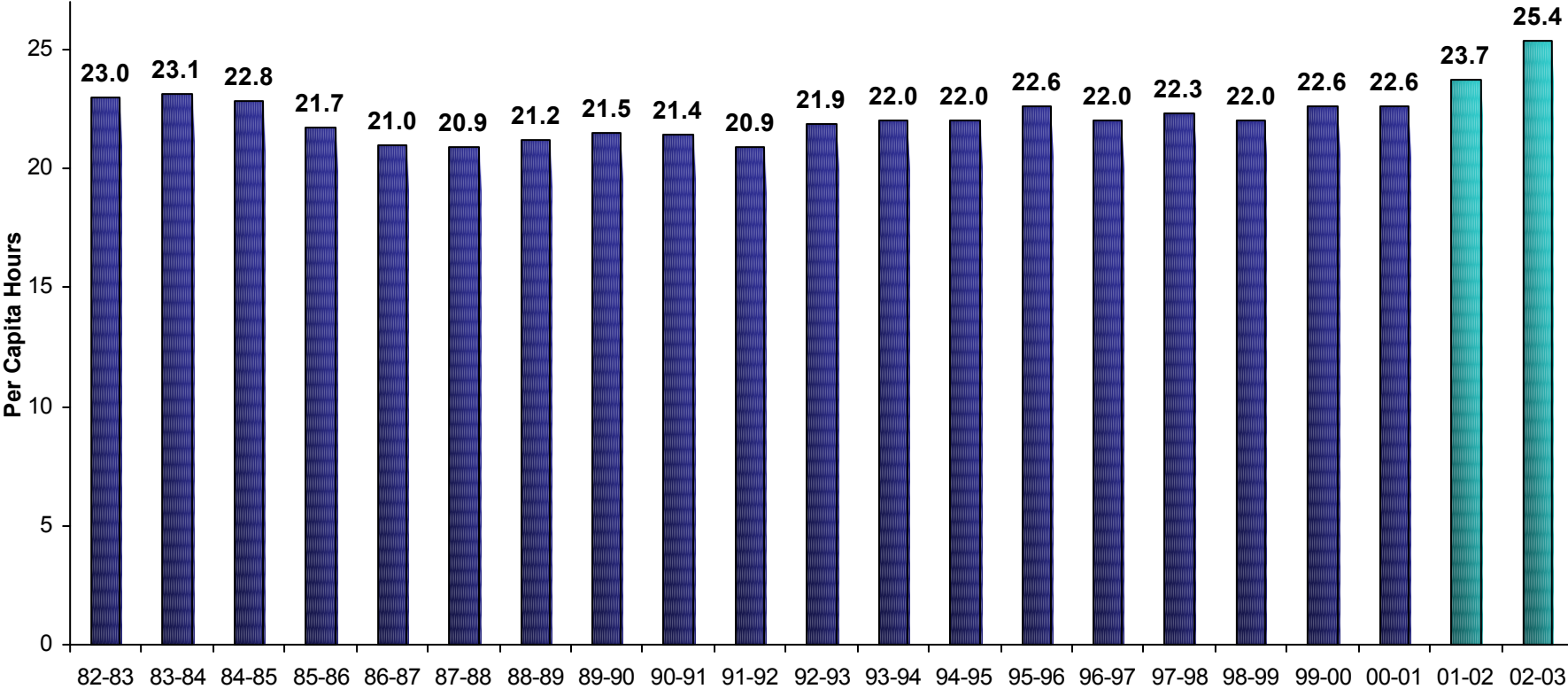


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# Television Viewing Patterns

# Canadians are watching more television each week (25.4 hours) than ever

## Weekly Per Capita Hours Of Viewing To Television All Persons 2+, 1982-83 to 2002-03 (September to August)

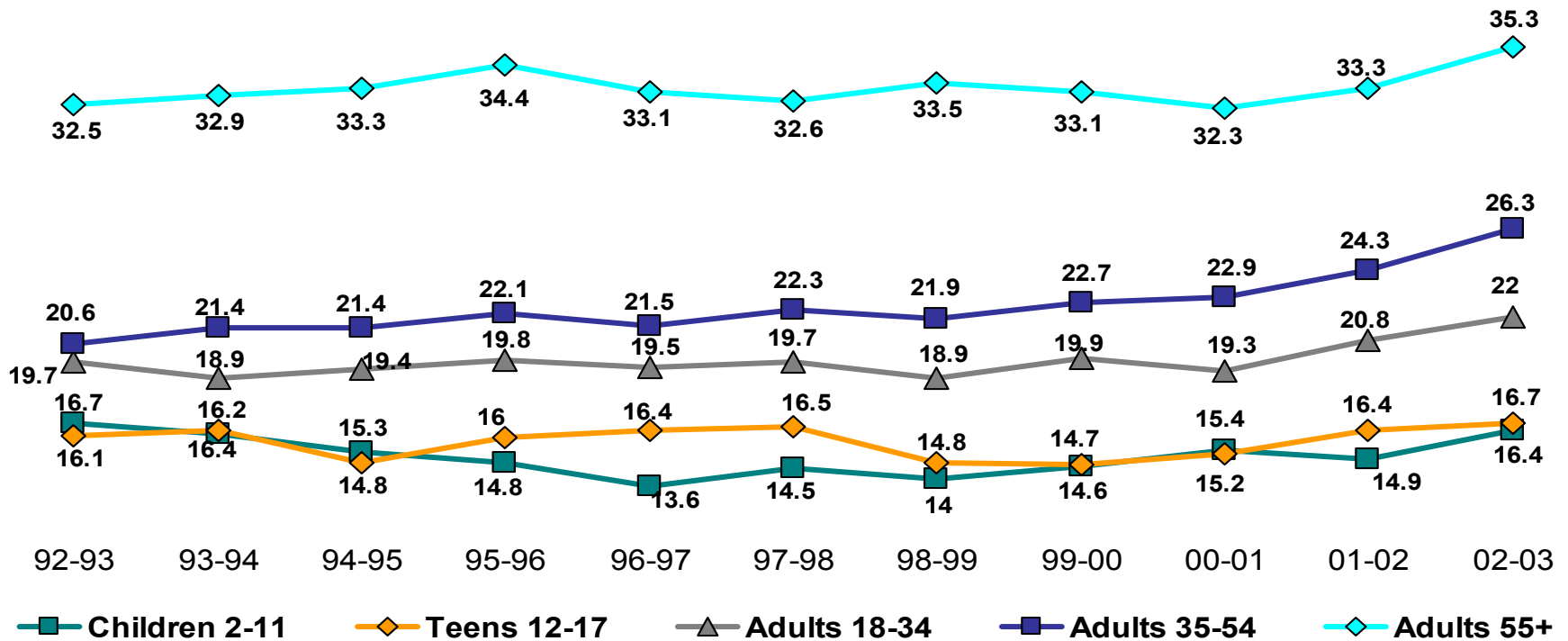


Note: BBM Weekly Per Capita (1982-83 - 1983-84) were adjusted to reflect year round viewing

SOURCE: BBM, Nielsen Media Research, Statistics Canada

# Canadians, of all ages, even kids and teens, are watching more television

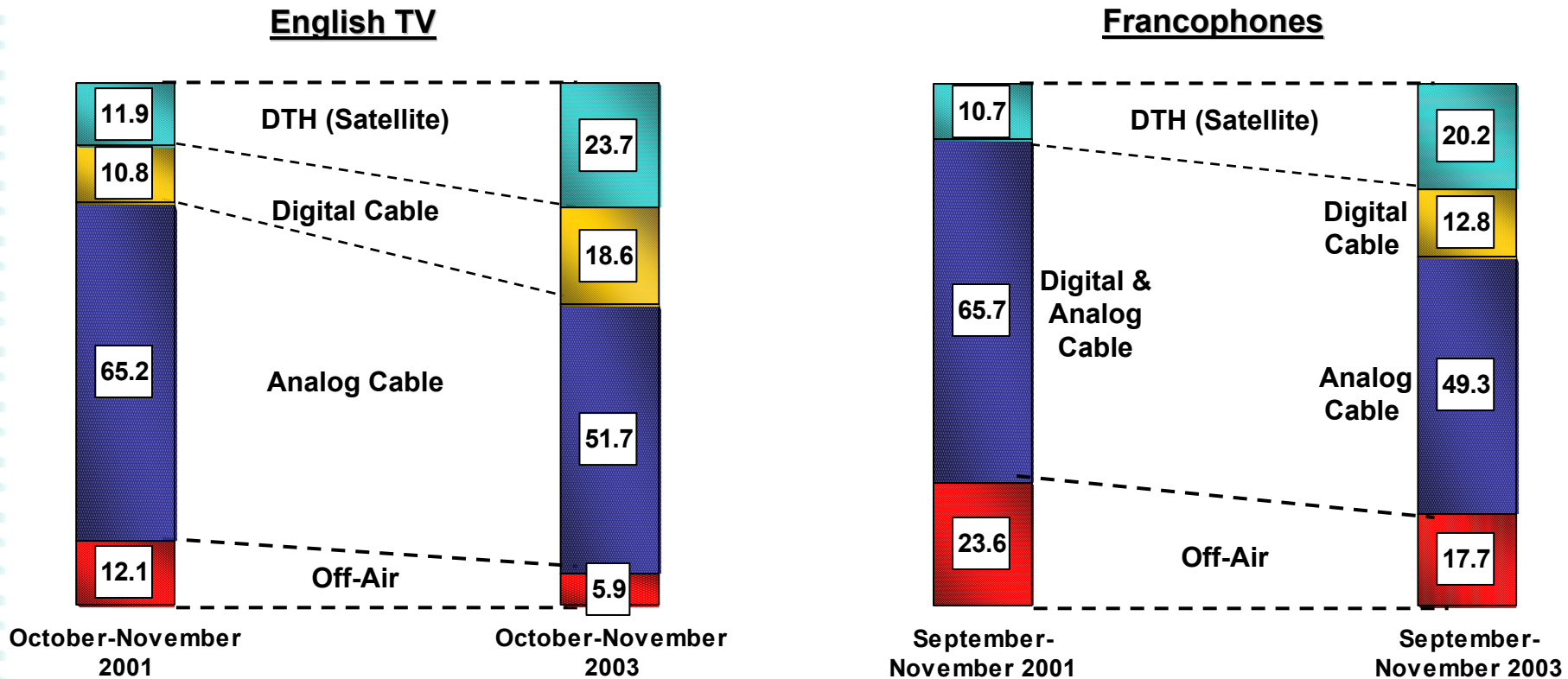
## Weekly Per Capita Hours Of Viewing For Selected Demographic Groups 1992-93 to 2002-03 (September to August)



SOURCE: Nielsen Media Research

# More Canadians have access to more channels and an enhanced viewing experience as well

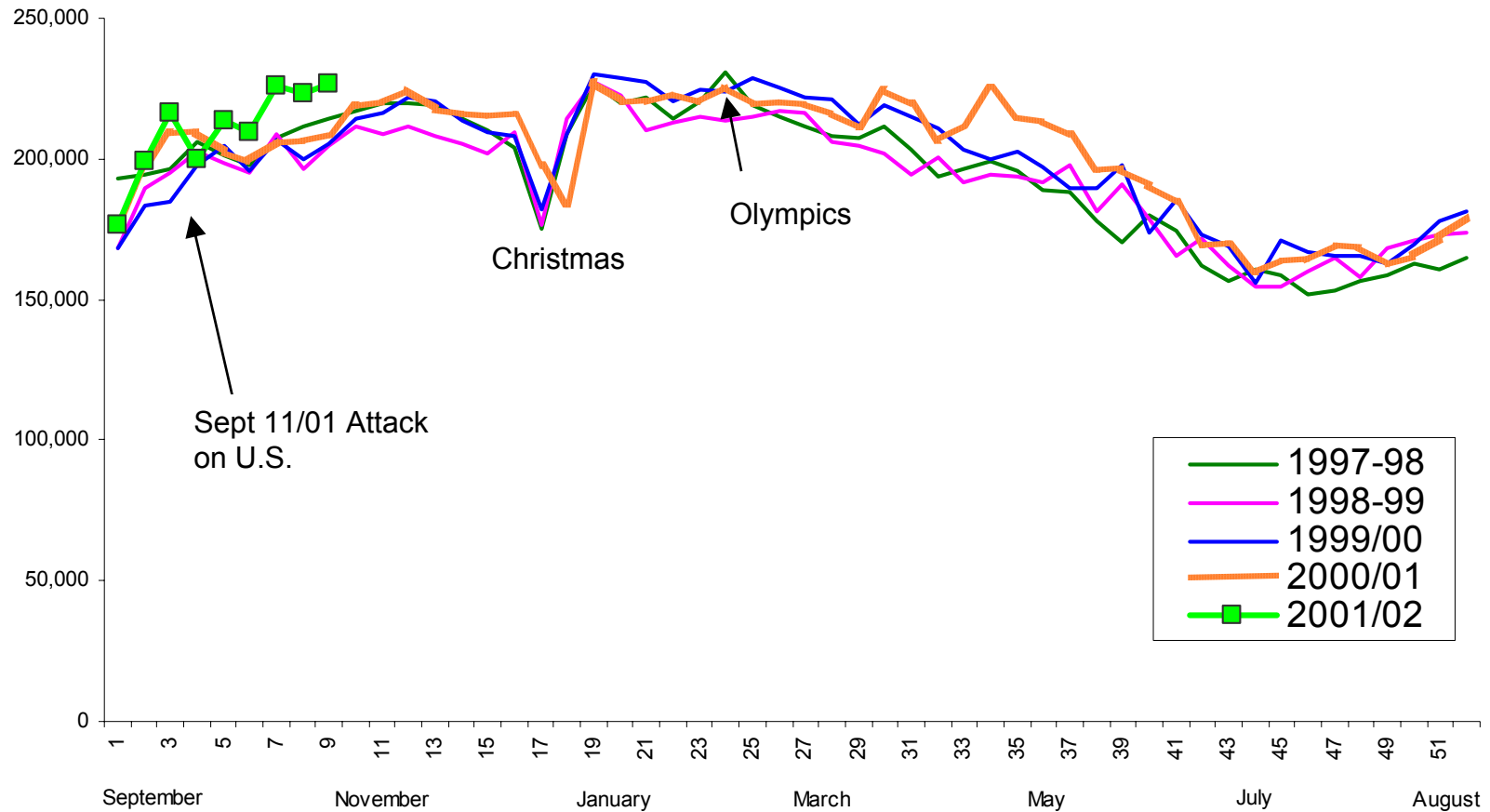
**Distribution Of Viewing to English TV/Francophones by Viewing Environment**  
 Monday - Sunday, 24 Hours  
 %



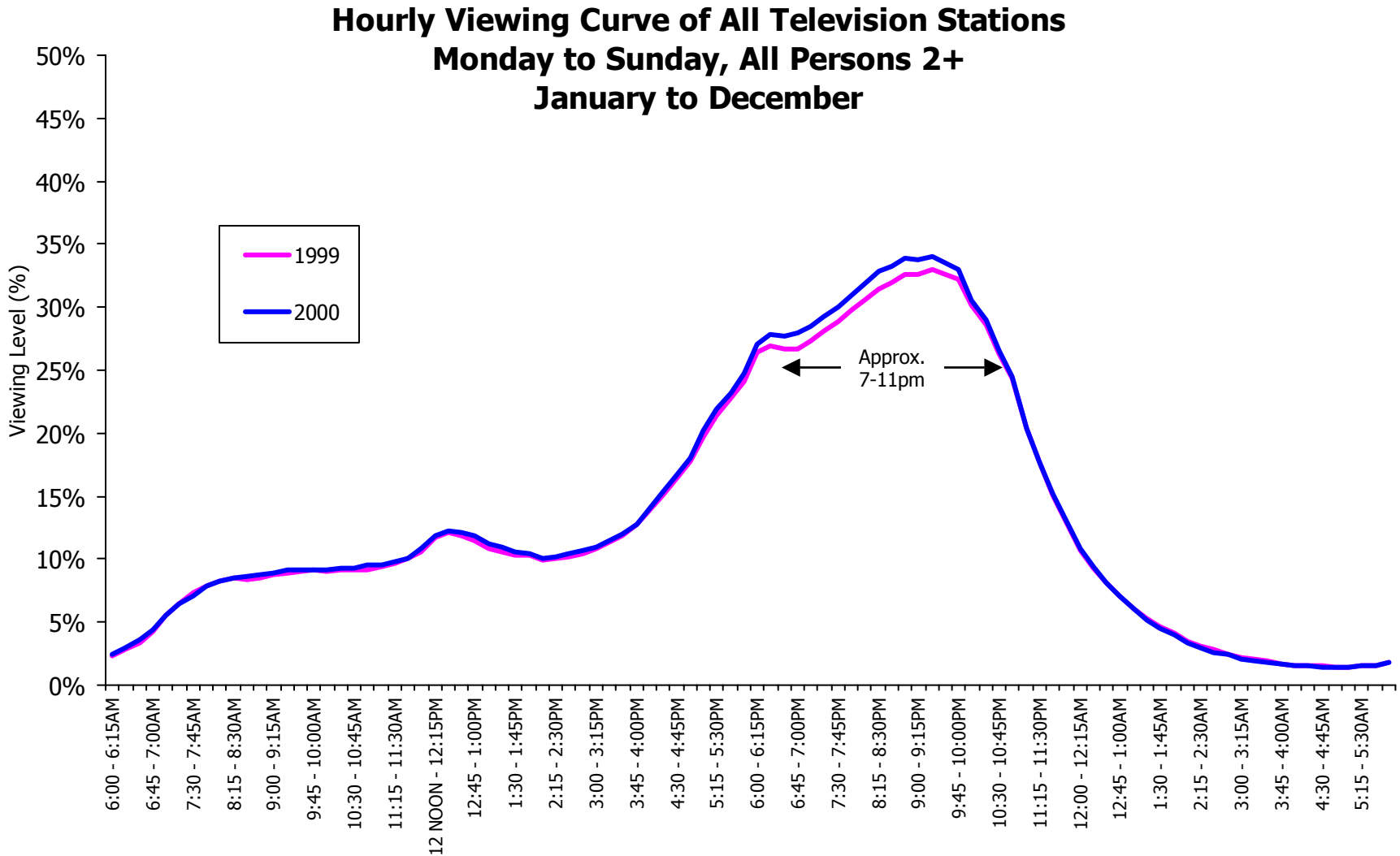
Source: Nielsen Media Research, BBM

# Viewing throughout the year: the effect of special programming & world events

Viewing Levels (Total Hours Tuned)  
1997/98 thru 2000/01, All Persons 2+  
M-S, Prime - 7-11pm

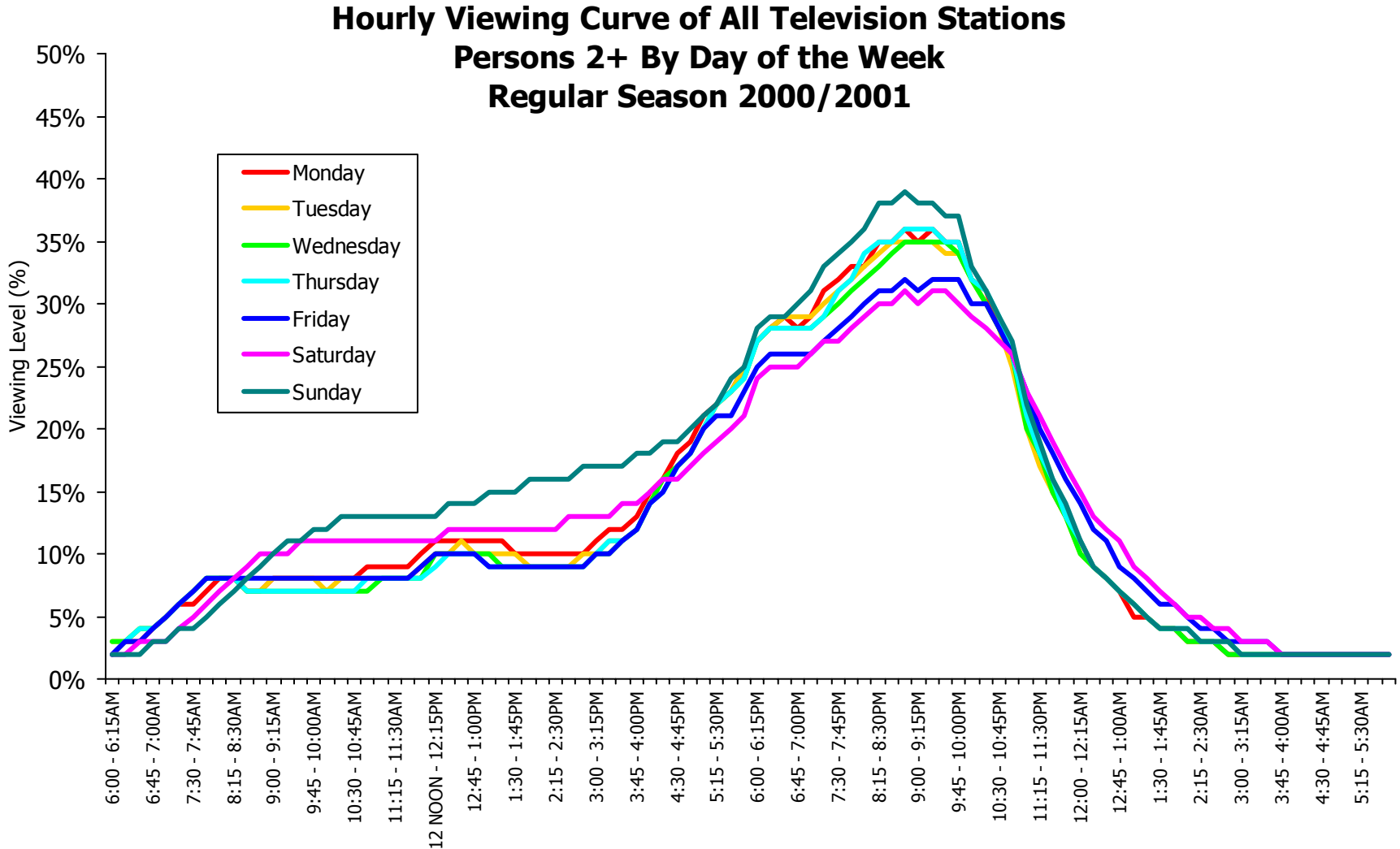


# Viewing throughout the day: consistent from year to year



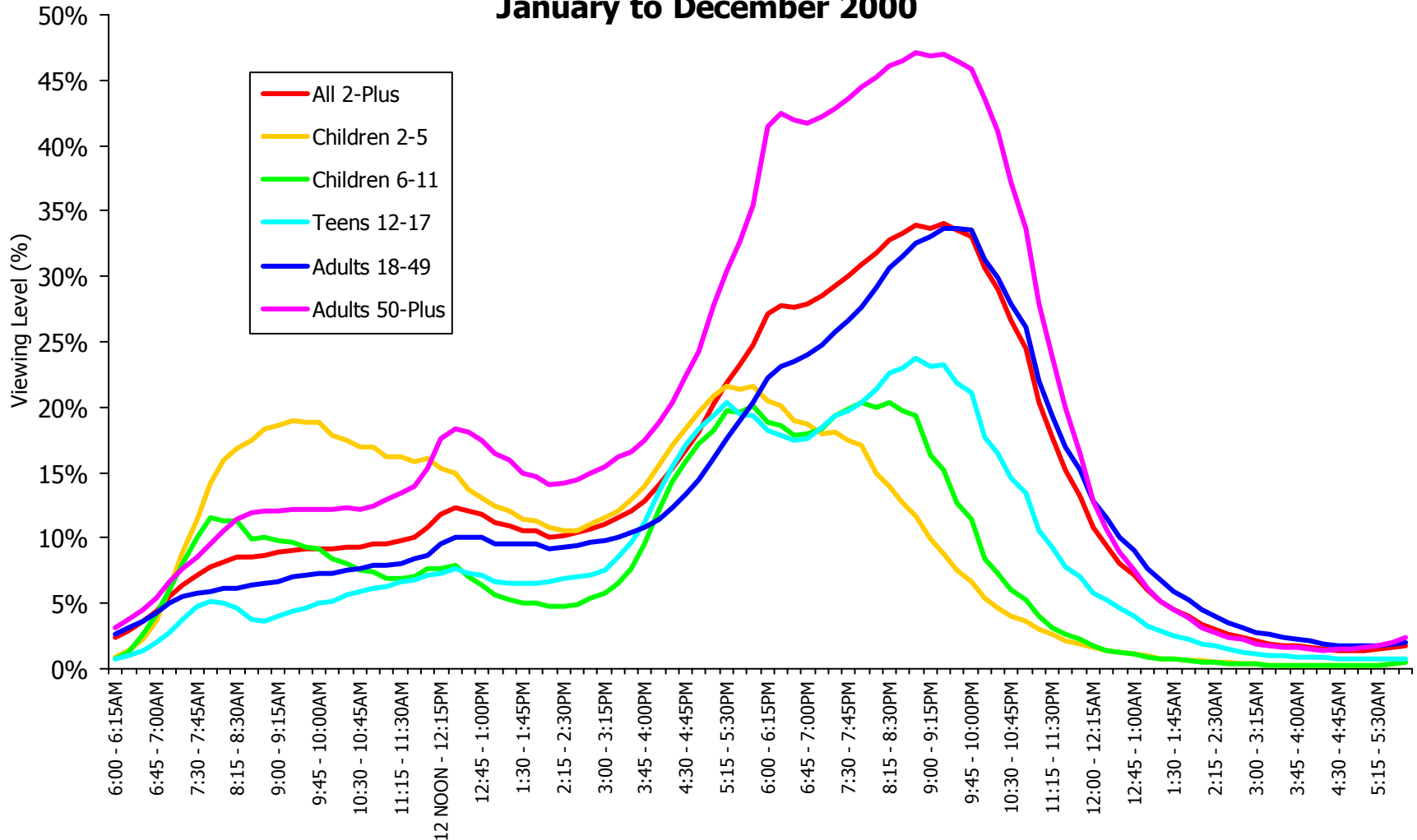
Source: CBC Research (Nielsen Media Research), Oct/00-April/01, Anglos 2+

# Viewing by day: highest viewing on Sundays



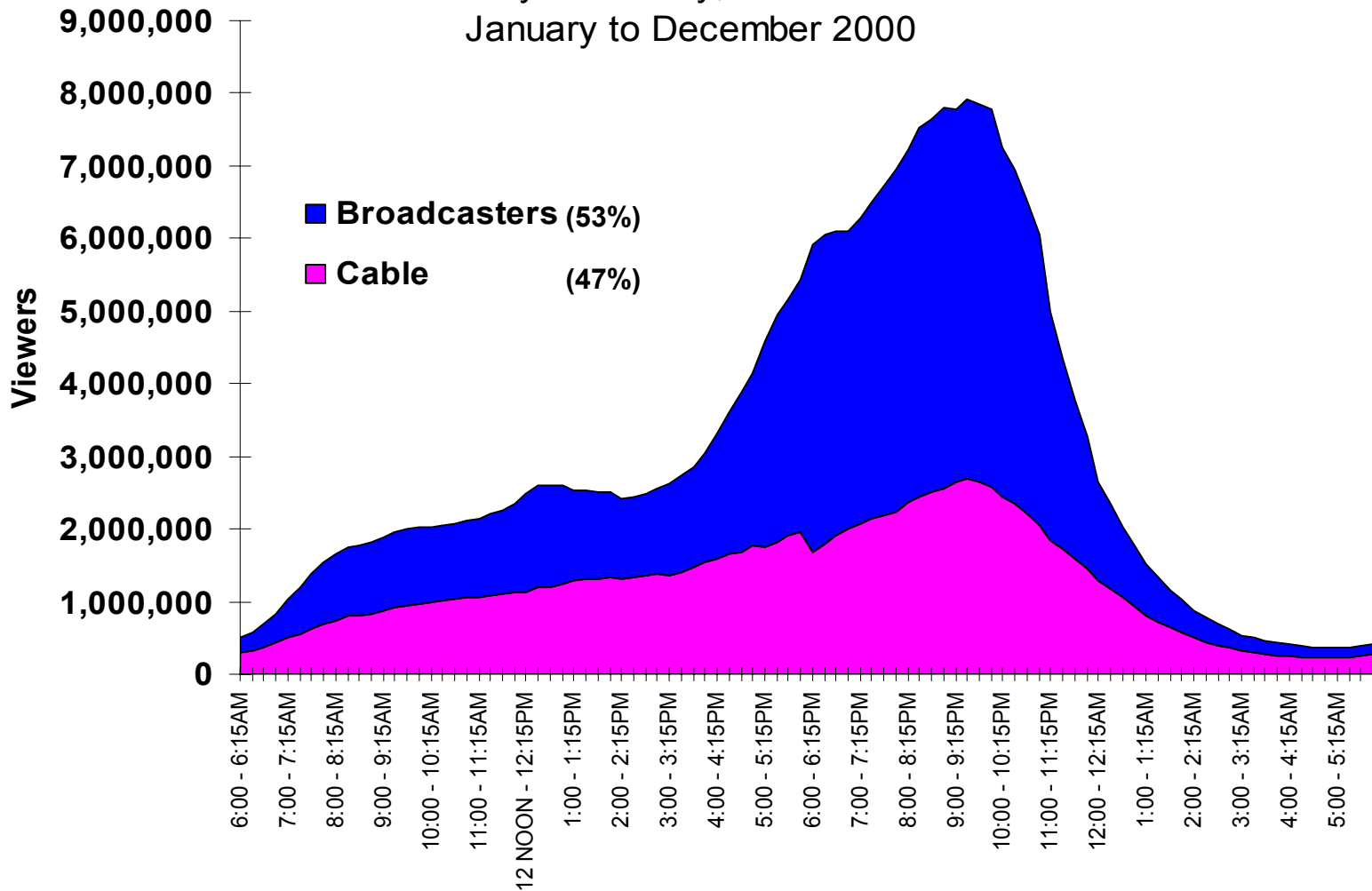
# Viewing by age group : Kids watch in the morning and the afternoon

## Hourly Viewing Curve of All Television Stations Monday to Sunday January to December 2000



# Viewing by Broadcasters versus Specialty: Broadcasters see larger prime time spike

Hourly Viewing Curve of English TV Cable Services  
Monday to Sunday, All Persons 2+  
January to December 2000



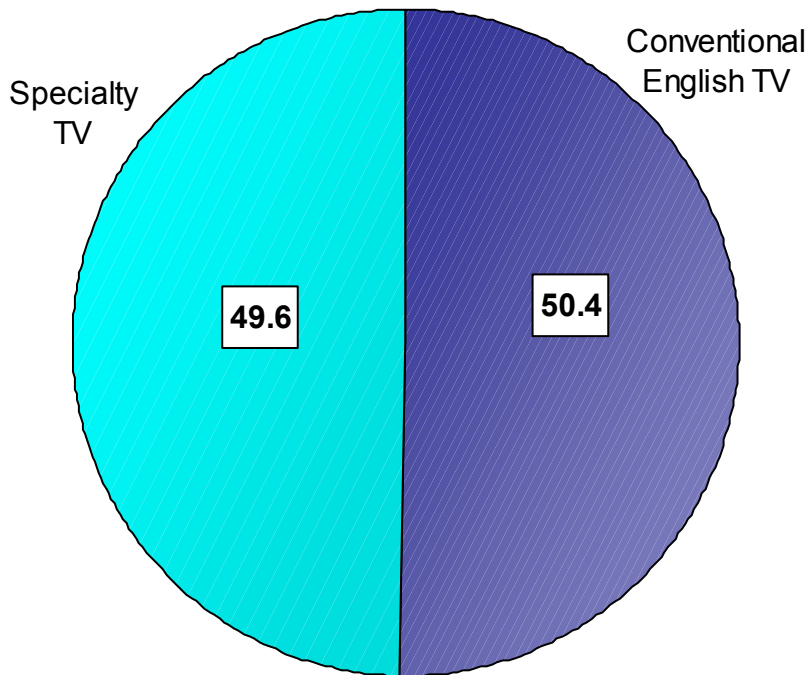
# The markets for English TV and francophones in Canada are very different

## Share of Viewing to English TV and Share Among Francophones

All Day, 24 Hours

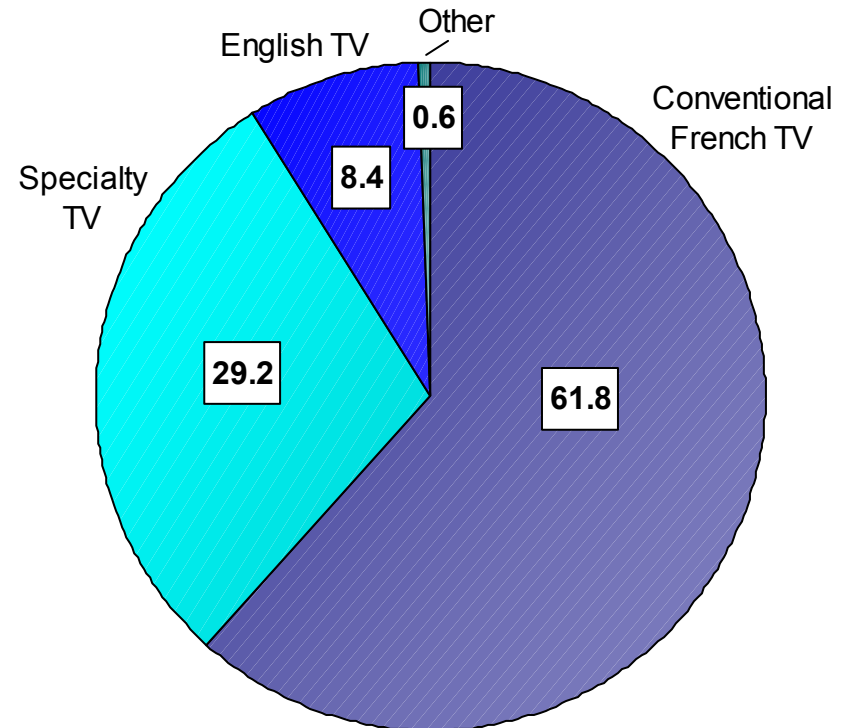
%

### English TV



October – November, 2003  
Source: Nielsen Media Research

### Francophones



September – November, 2003  
Source: BBM

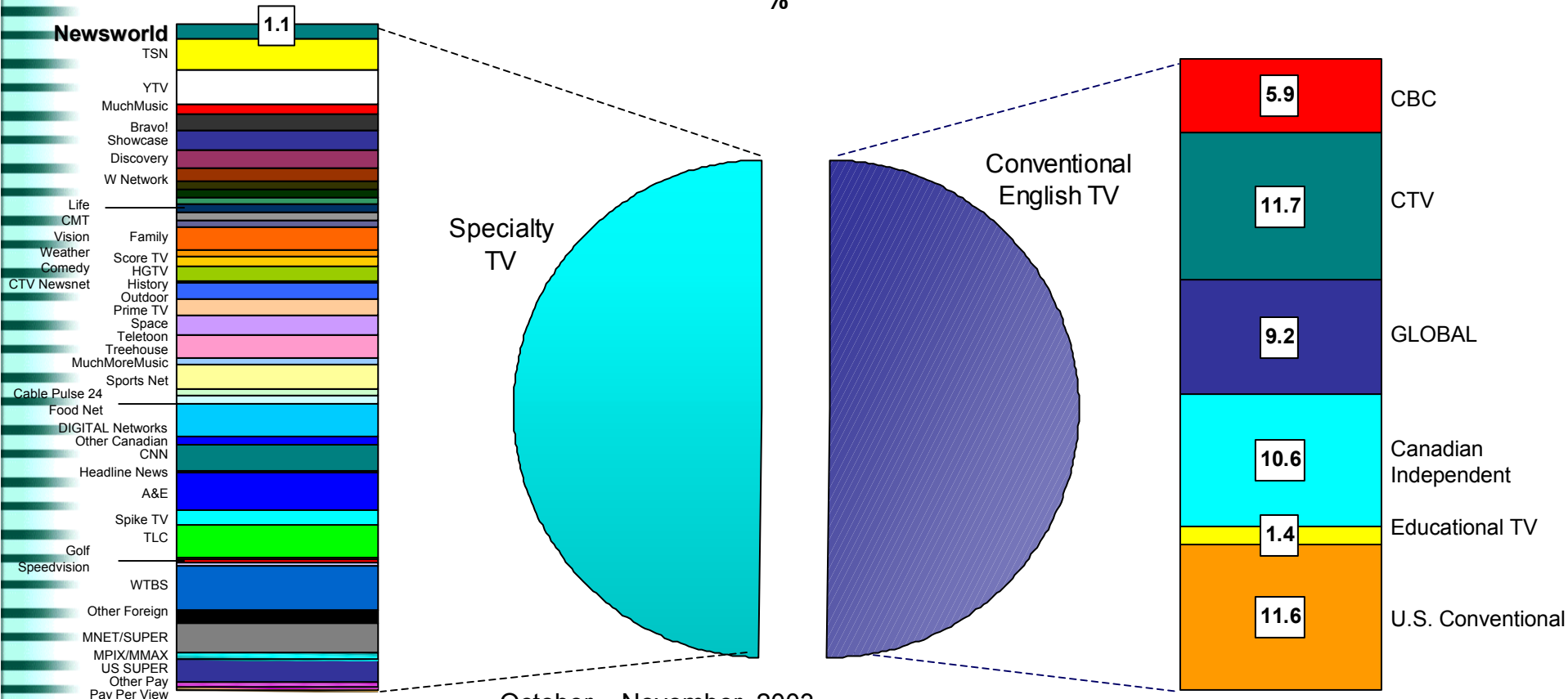


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# English Television

# The English TV market – highly fragmented, with specialties accounting for half of all viewing

**Share of Viewing to English TV**  
All Day, 24 Hours  
%



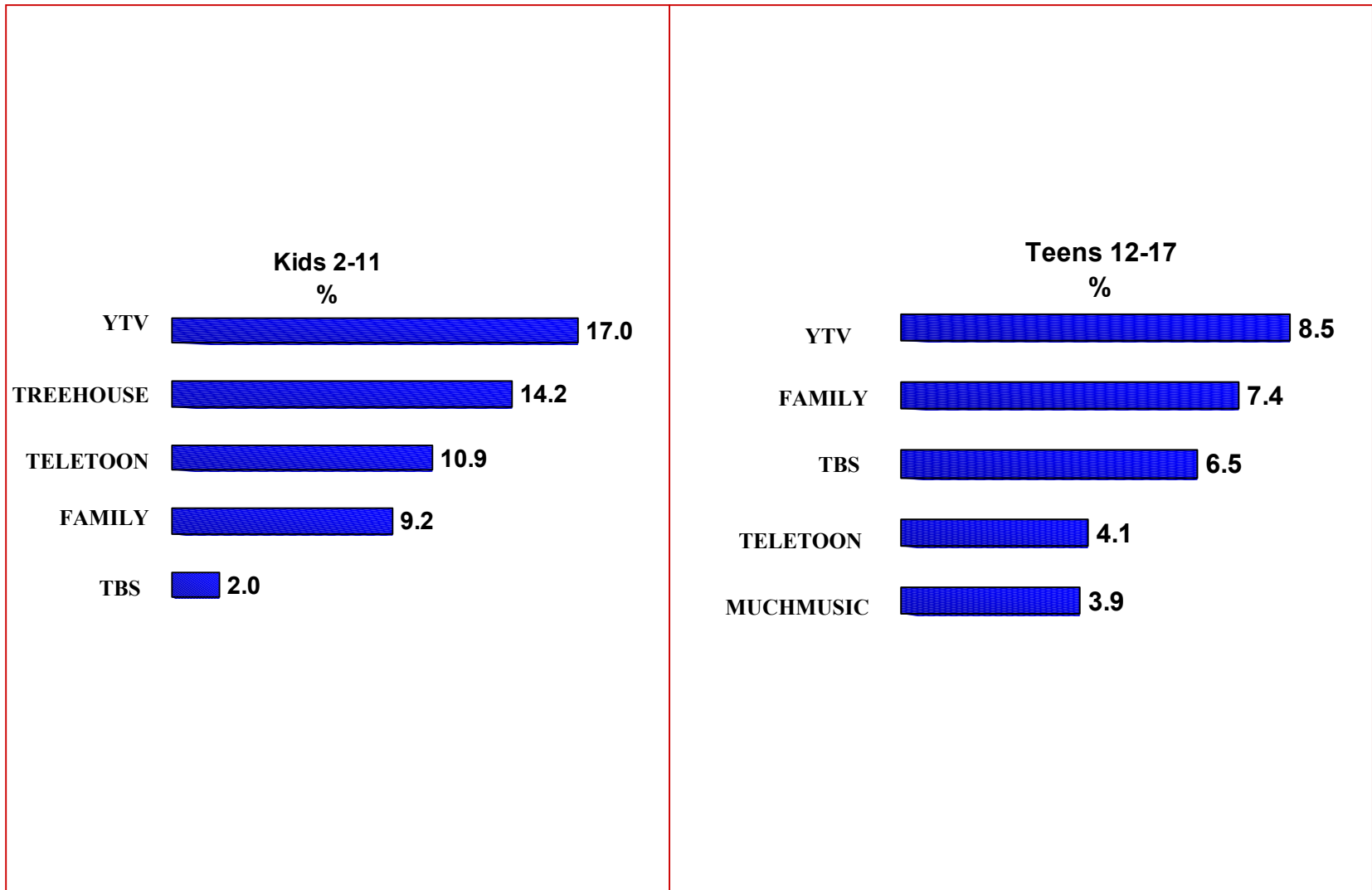
October – November, 2003  
Source: Nielsen Media Research

# Share of Specialty Services in Canada

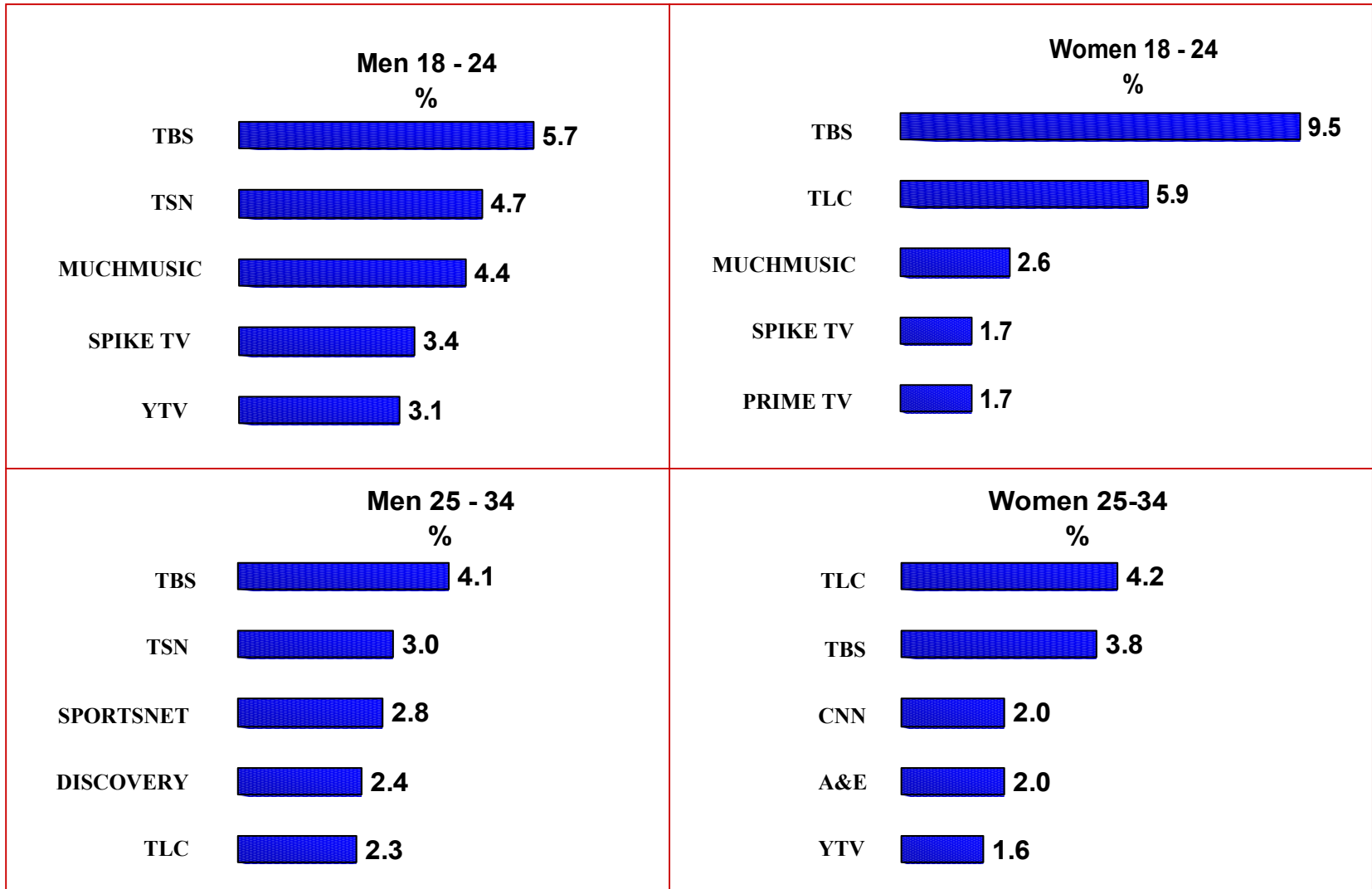
All 2+

	NETWORK	SHARE		NETWORK	SHARE
1	TBS	3.2	19	History TV	1.0
2	A&E	2.8	20	Muchmusic	0.8
3	TLC	2.6	21	HGTV	0.8
4	YTV	2.5	22	Comedy	0.7
5	TSN	2.2	23	CMT	0.6
6	CNN	1.9	24	Weather Network	0.6
7	Sportsnet	1.9	25	Life Network	0.6
8	Family Channel	1.7	26	Cable Pulse 24	0.6
9	Teletoon	1.6	27	Food Net Canada	0.5
10	Treehouse TV	1.6	28	CTV Newsnet	0.4
11	Showcase	1.5	29	Score TV	0.4
12	Discovery	1.4	30	Muchmoremusic	0.4
13	Prime TV	1.3	31	Vision	0.3
14	Space	1.3	32	Speedvision	0.3
15	Bravo	1.2	33	Outdoor Life	0.2
16	Spike TV	1.2	34	Golf Channel	0.2
17	Newsworld	1.0	35	Headline News	0.2
18	W Network	1.0	36	CNBC	0.1

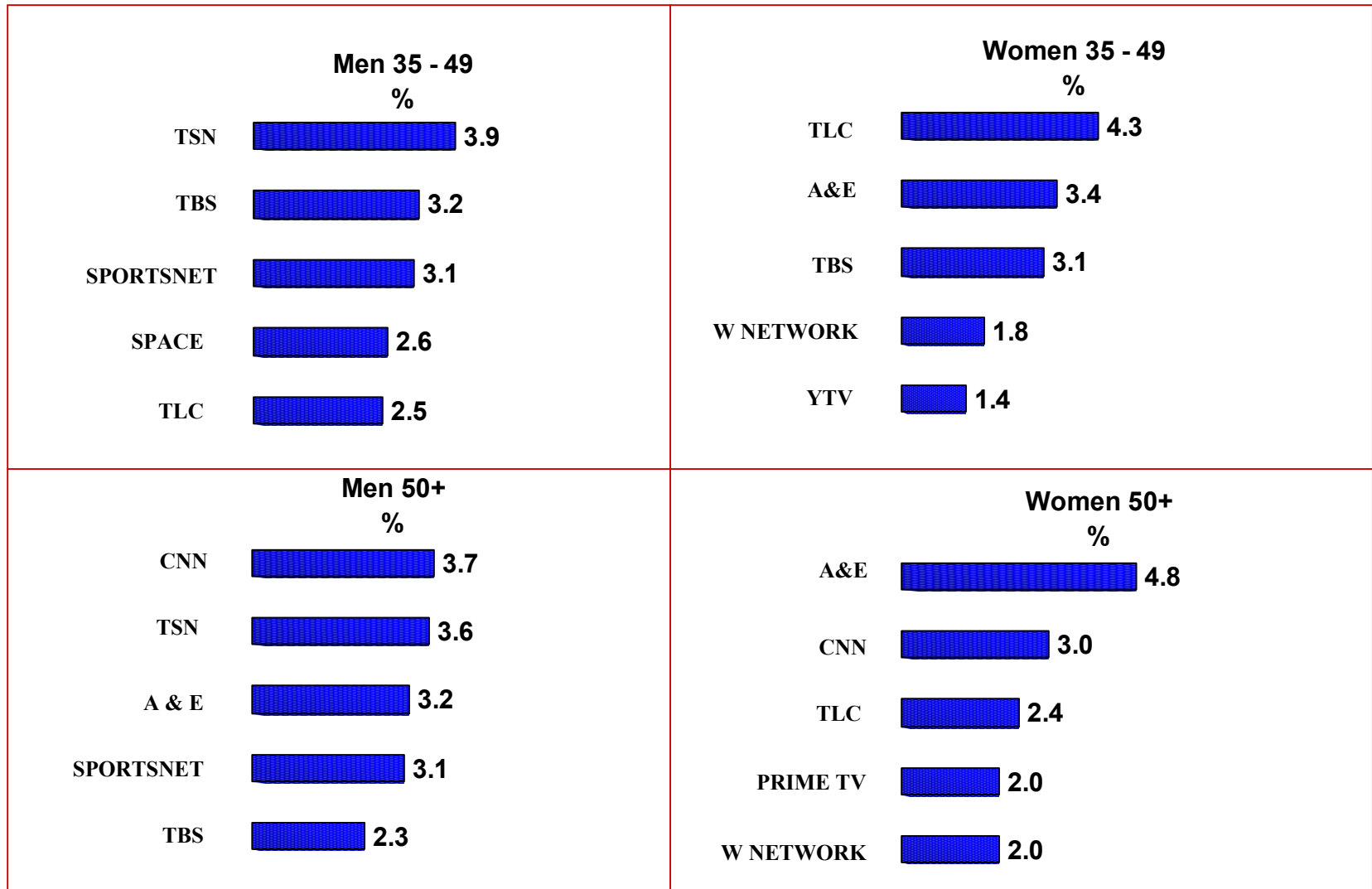
# Top Specialty Services by Age Groups



# Top Specialty Services by Age Groups



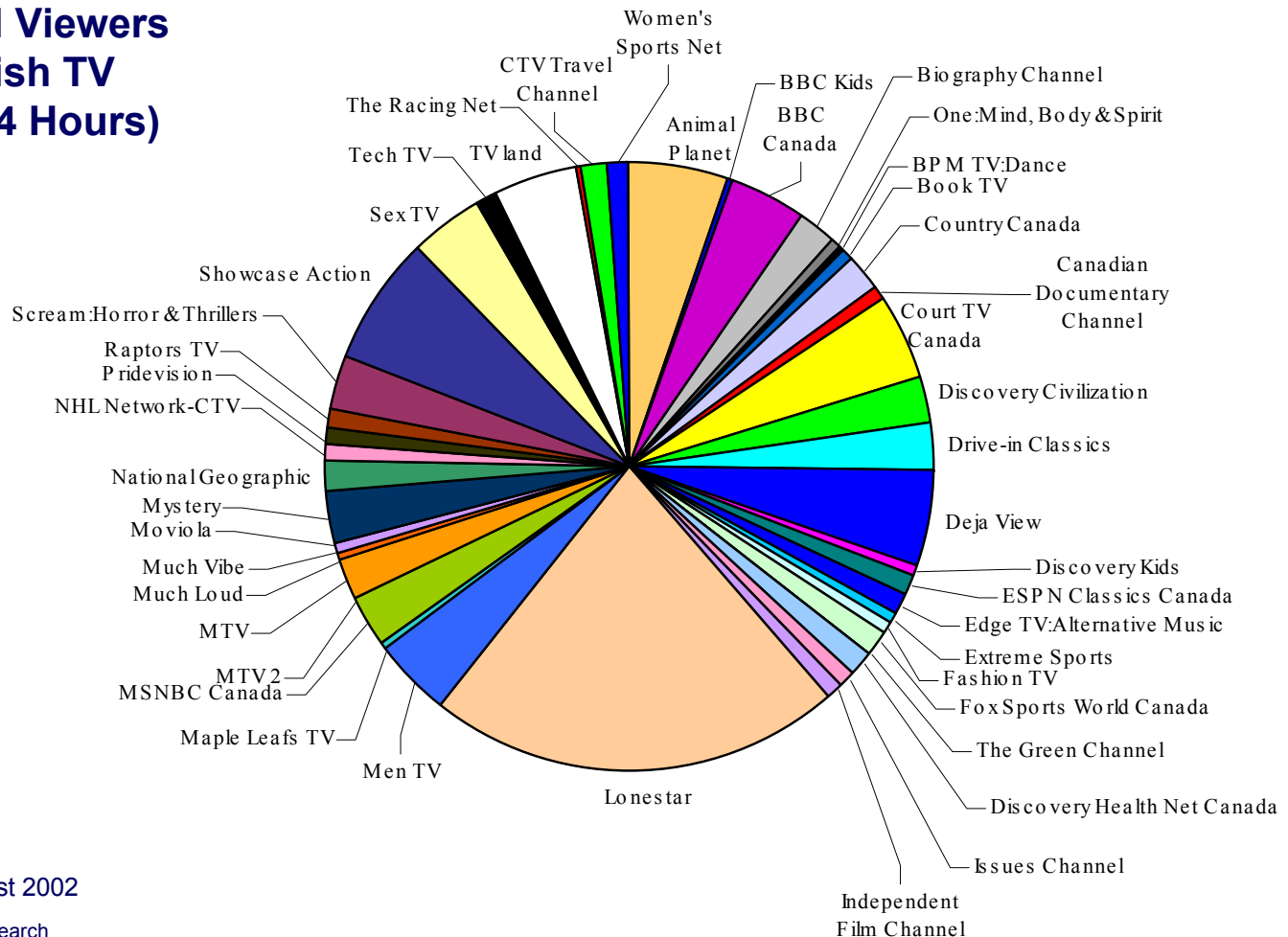
# Top Specialty Services by Age Groups



# Diginets

All of these channels together accounted for 2 per cent of all viewing

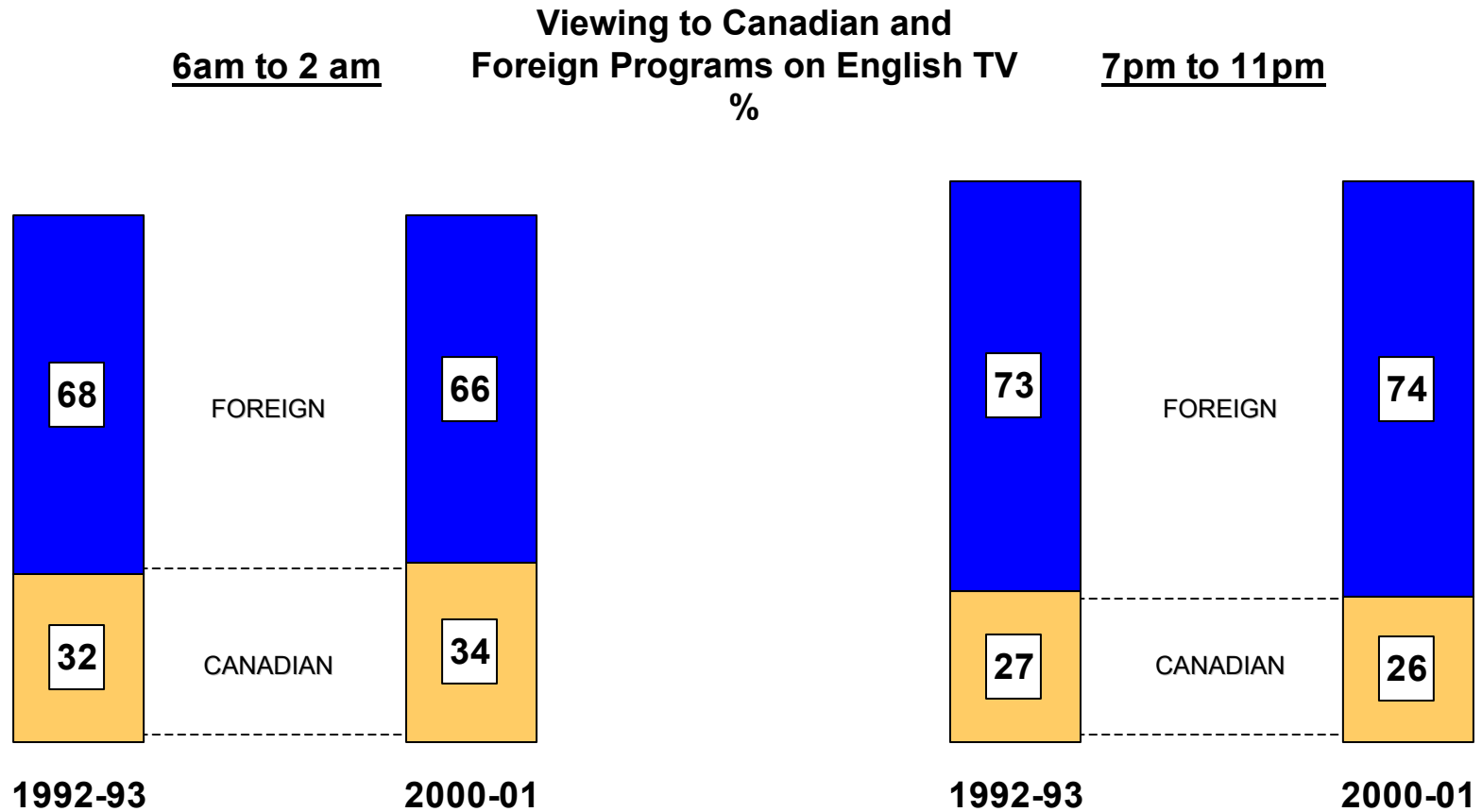
## English Digital Channels Among All Viewers to English TV All Day (24 Hours) %



September 2001 to August 2002

SOURCE: Nielsen Media Research

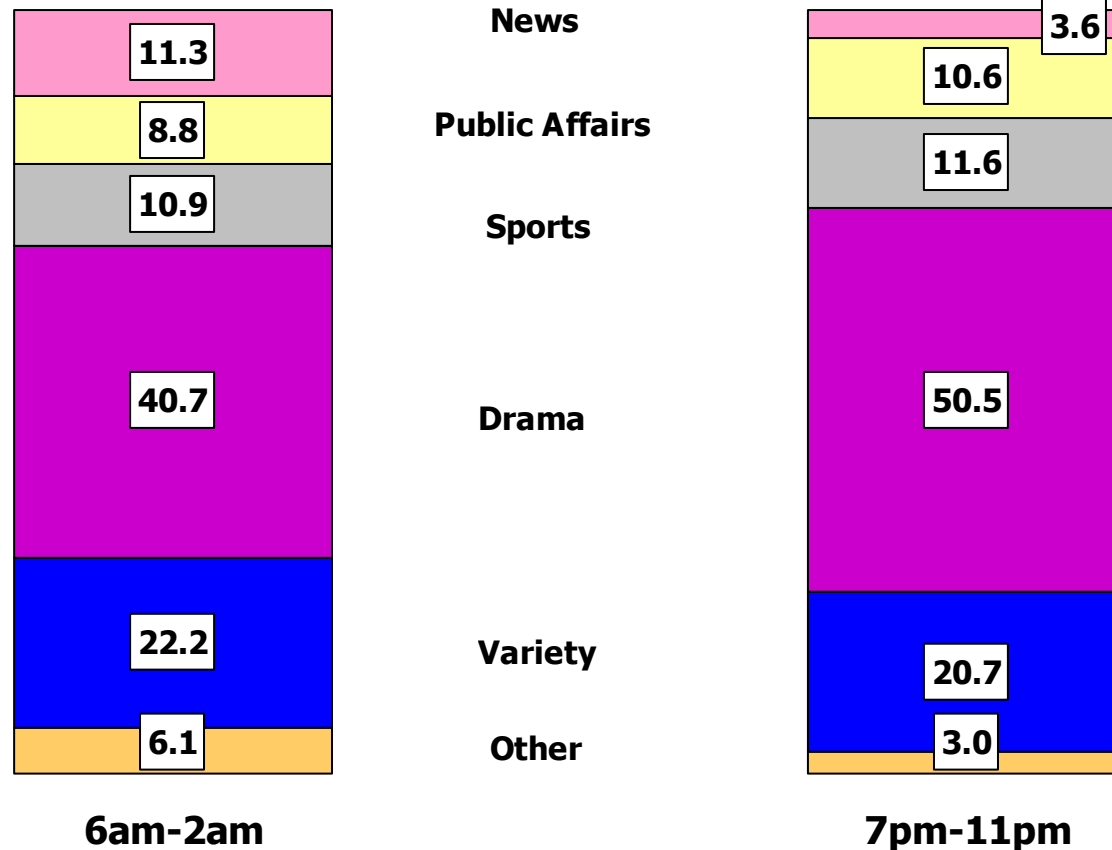
Viewing to Canadian programs on English TV, as a proportion of all viewing, has remained stagnant over the last 10 years.



Entertainment programming (drama & variety) account for 3/5<sup>ths</sup> of all viewing to English TV over the whole day and 2/3<sup>rds</sup> in prime time

The Viewing of Various Types of TV Programs in Canada  
Monday to Sunday, 6am-2am and 7pm-11pm  
2000-2001  
%

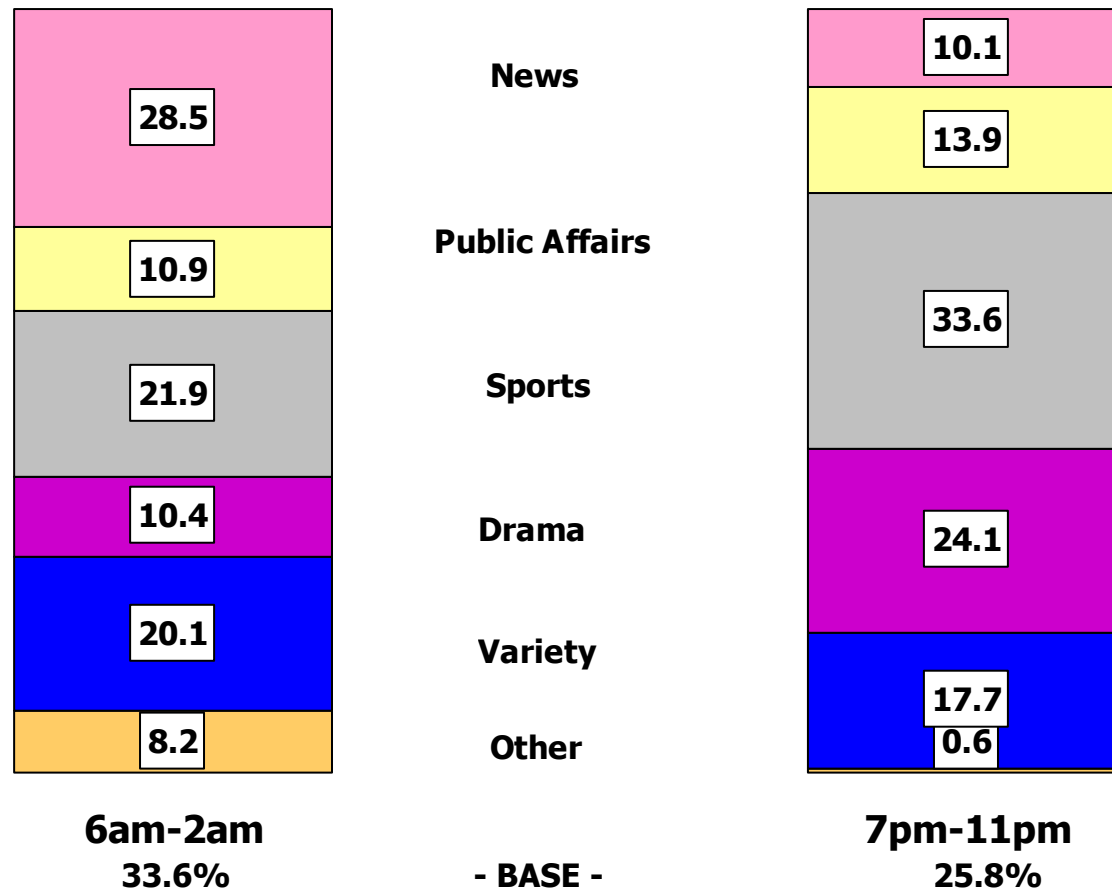
English TV



News accounts for over one-quarter of all viewing to Canadian programs over the whole day, while sports accounts one-third in prime time.

The Viewing of Various Types of Canadian Programming  
Monday to Sunday, 6am-2am and 7pm-11pm  
2000-2001  
%

English TV



In 1998-99, the base excludes infomercials and lotteries

Source: Nielsen Media Research

# Audience to Canadian Drama/Comedy Series

<b>RANK</b>	<b>NETWORK</b>	<b>PROGRAM</b>	<b>AMA (000)</b>
1	CBC	Royal Canadian Air Farce	780
2	CTV	Sue Thomas F. B. Eye	678
3	CBC	This Hour Has 22 Minutes	631
4	CTV	Degrassi: Next Generation	621
5	CBC	Da Vinci's Inquest	514
6	CTV	Just for Laughs Gags (CTV)	471
7	CBC	Just for Laughs	452
8	CBC	Red Green Show	393
9	CBC	72 Hours: True Crime	373
10	CBC	Just for Laughs Gags (CBC)	336
11	CBC	Royal Canadian Air Farce (r)	335
12	CBC	American In Canada	314
13	CTV	Comedy Now	304
14	CBC	This Hour Has 22 Minutes (r)	284
15	Global	Andromeda	246

Note: Prime time shows only, September 1, 2003 to November 30, 2003.

Source: CBC Research (Nielsen Media Research)

# Audience to Top 20 Regular Series

RANK	NETWORK	PROGRAM	AMA (000)
1	Global	 Survivor: Pearl Islands	3508
2	CTV	 Canadian Idol Results (Tue)	2739
3	CTV	 C.S.I.	2632
4	CTV	 C.S.I. Miami	2407
5	CTV	 Canadian Idol (Mon)	2367
6	CTV	 ER	1991
7	CTV	 Law & Order: CI	1766
8	CTV	 Law & Order	1753
9	Global	 Friends	1693
10	CTV	 For Love or Money 2	1656
11	CTV	 Law & Order: SVU	1640
12	CTV	 8 Simple Rules	1567
13	Global	 Simpsons (Sun 8:30 pm)	1563
14	CTV	 The OC	1476
15	Global	 Will & Grace	1433
16	CTV	 Third Watch (Fri 10 pm)	1426
17	CTV	 C.S.I. (repeats)	1419
18	Global	 Big Brother 4	1368
19	Global	 Simpsons (Sun 8 pm)	1357
20	CTV	 Third Watch (Mon 9 pm)	1356

Note: Prime time shows only, airing on CBC, CTV and Global. September 1, 2003 to November 30, 2003.

Source: CBC Research (Nielsen Media Research)

# Audience to Top 20 Specials

RANK	NETWORK	PROGRAM	AMA (000)
1	CBC	 Grey Cup Game	3310
2	CBC	 H.N.I.C. Heritage Classic Mtl vs. Edm (7pm)	2747
3	CBC	 Heritage Classic – NHL Mega Stars Game	2337
4	CTV	 Emmy Awards	2067
5	CBC	 Hockey Pre-Game (between H.C. Games)	1854
6	CBC	 CFL: Western Final	1564
7	CBC	 Shattered City	1503
8	CTV	 American Idol X-Mas	1496
9	CBC	 CFL: Eastern Final	1369
10	CBC	 CFL: Western Semi-Final	1058
11	CTV	 Pre-Emmy Preview	1045
12	CBC	  Gathering Storm	1037
13	CBC	 City of Ruins	1011
14	CTV	 Dr. Dolittle 2	1001
15	CBC	  Gladiator	995
16	CBC	 Marketplace Season Premier (60 min)	978
17	CTV	 American Music Awards	976
18	CBC	  Crouching Tiger Hidden Dragon	966
19	CBC	 CFL: Eastern Semi-Final	939
19	CBC	 Just for Laugh Laughs at Britain	939

Note: Specials airing on CBC, CTV and Global only. September 1, 2003 to November 30, 2003.

Source: CBC Research (Nielsen Media Research)

# Audience to Top Programs on Canadian Specialty Services

RANK	NETWORK	PROGRAM	AMA (000)
1	Showcase 	Six Feet Under (Sun 10 pm)	608
2	Space 	Movie: Star Trek (Thanks Giving Mon 4 pm)	382
3	Sportsnet 	MLB Playoffs (Prime Time Games)	381
4	TSN 	WWE Raw (Mon 9 pm)	353
5	YTV 	SpongeBob SquarePants (Sun 10 am)	349
6	TSN 	NFL Football (Tue & Sun 8:30 pm)	344
7	Sportsnet 	Hockey: Leafs (Mon & Sun 7:30 pm)*	327*
8	YTV 	Alvin Movie (Sun 2 pm)	323
9	YTV 	3 Hairy Thumbs Up (Sun 4 pm)	322
10	Bravo 	Movie: Entrapment (Labour Day Mon 9 pm)	318

Note: September 1, 2003 to November 2, 2003.

\* Regional audiences – Ontario only

Source: CBC Research (Nielsen Media Research)

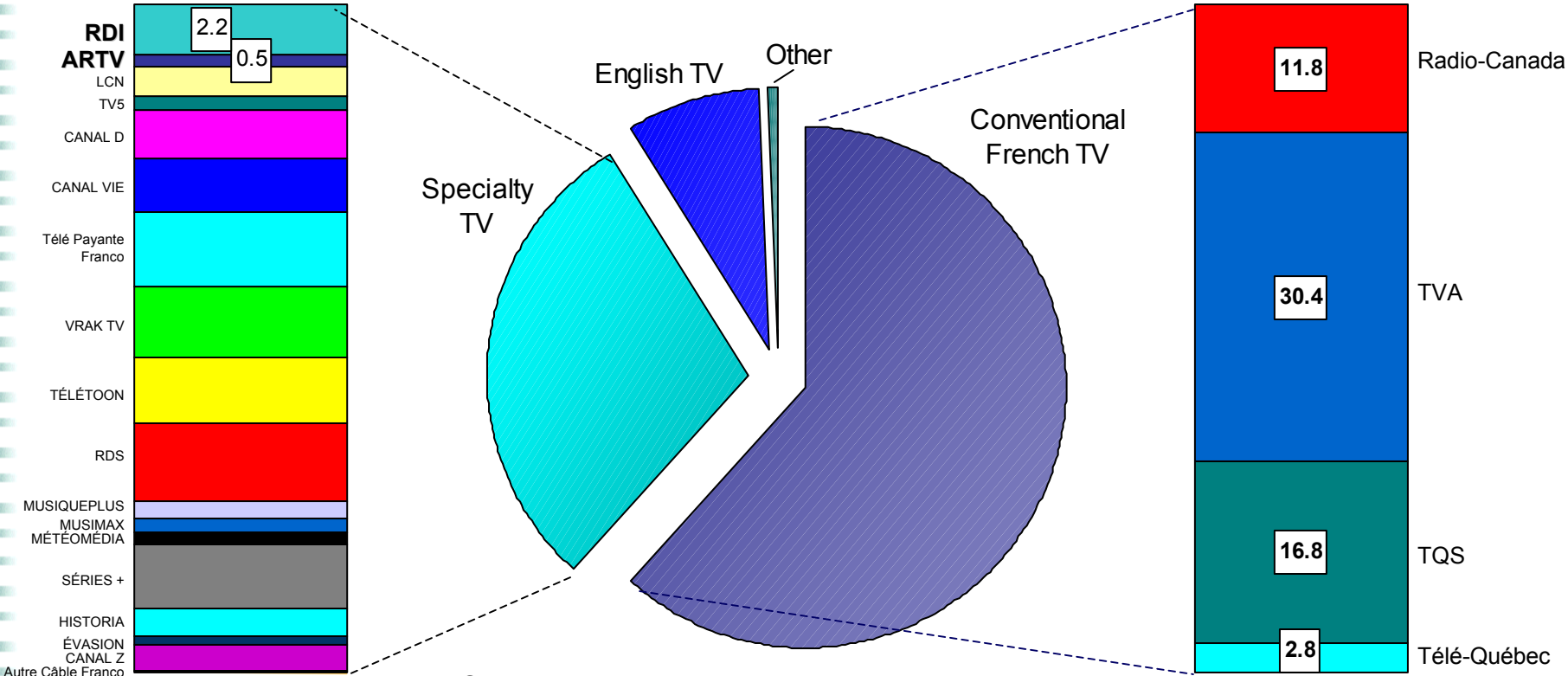


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# French Television

# The francophone environment – dominated by two strong private conventional broadcasters

**Share of Viewing Among Francophones**  
All Day, 24 Hours  
%

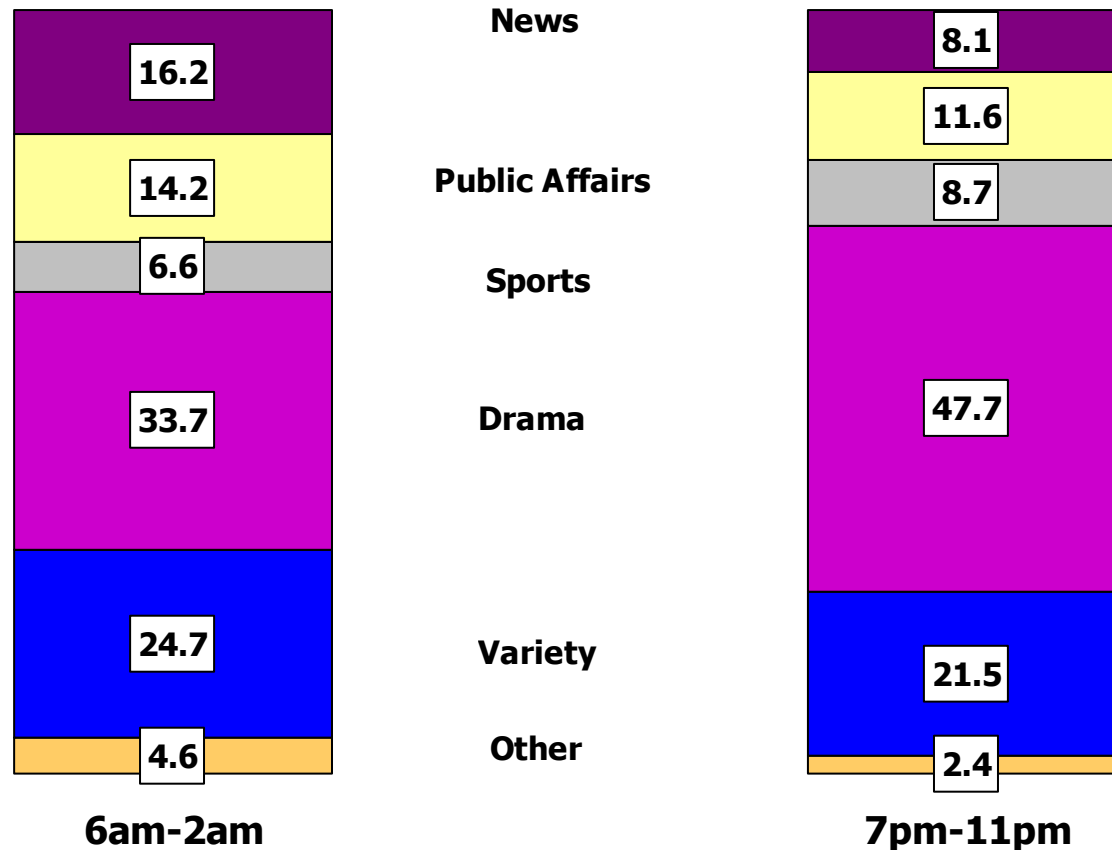


September – November, 2003  
Source: BBM

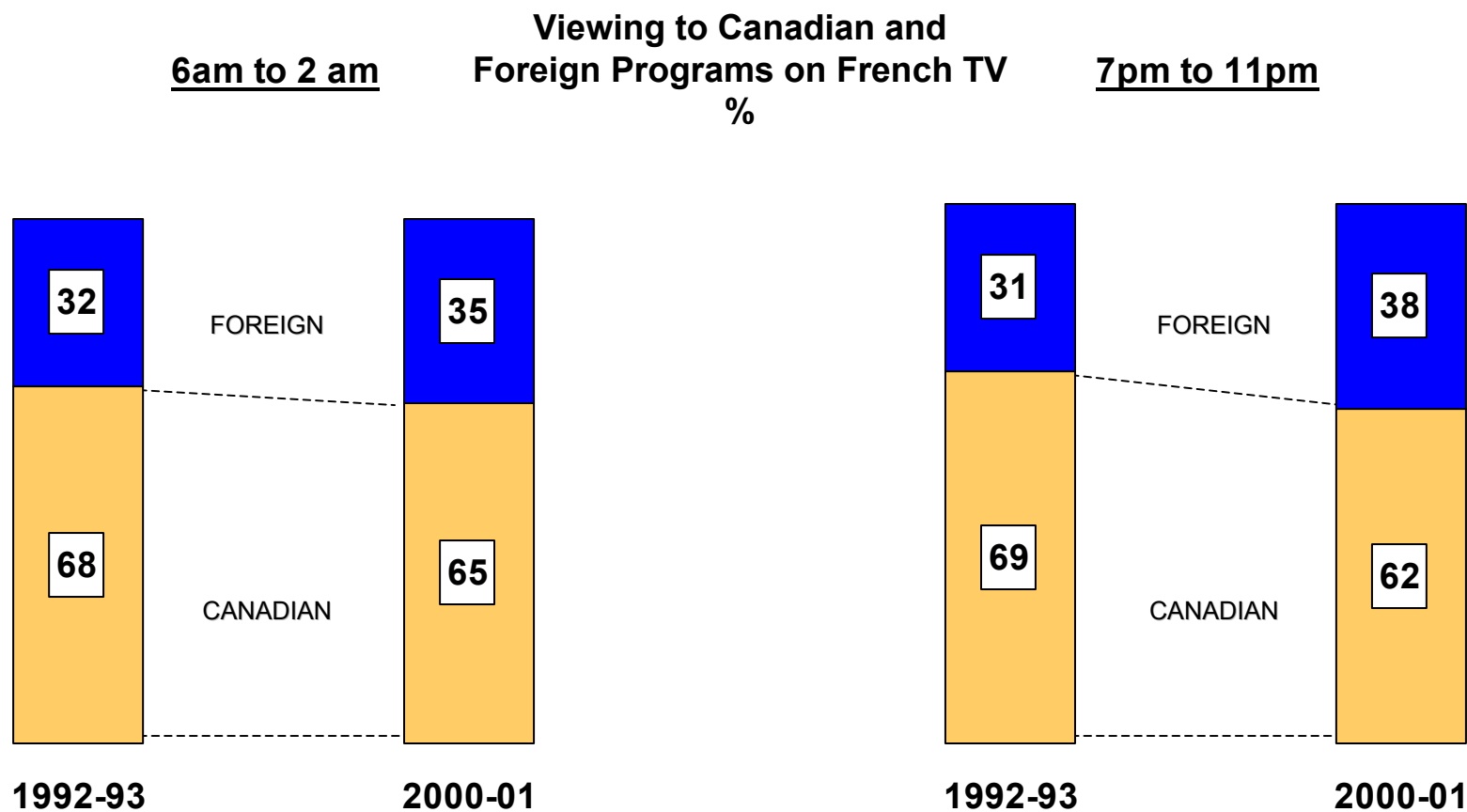
Entertainment programs (drama & variety) account for almost three-fifths of all viewing to French TV over the whole day and two-thirds in prime time

The Viewing of Various Types of TV Programs in Canada  
Monday to Sunday, 6am-2am and 7pm-11pm  
2000-2001  
%

French TV



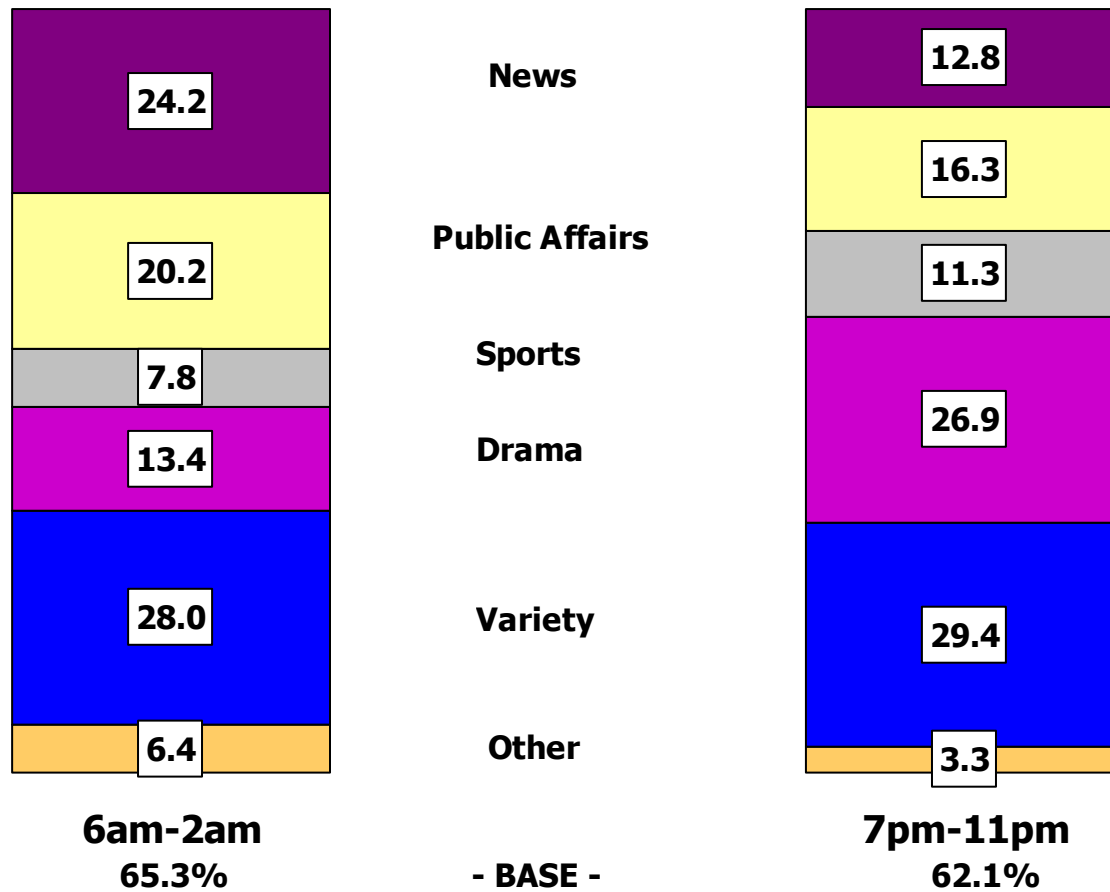
There has been a decline, especially in prime time, in the viewing of Canadian programs on French TV.



# Information programs (news & public affairs) and entertainment programs (drama & variety) each account for over two-fifths of all viewing to French TV

The Viewing of Various Types of Canadian Programming  
Monday to Sunday, 6am-2am and 7pm-11pm  
2000-2001  
%

French TV



# Palmarès des émissions régulières des réseaux francophones

RANG	RÉSEAU	ÉMISSION	DENSITÉ (000)	# diffusions
1	TVA	Occupation double (jeudi 20h)	1796	9
2	TQS	Loft Story talk show	1463	9
3	TVA	Km/h	1195	13
4	TVA	Les poupées russes	1175	13
5	TQS	Loft Story (lundi-vendredi 19 h)	1139	40
6	TVA	Les auditions de Star Académie	1138	20
7	TVA	Histoires de filles	1131	13
8	TVA	Occupation double (jeudi 19 h)	1090	7
9	TVA	Tribu.com	1054	9
10	SRC	Jack Carter	994	8
11	TVA	Les retrouvailles	984	2
12	TVA	Emma	917	13
13	TVA	Le petit monde de Laura Cadieux	888	6
14	TVA	Arcand	873	13
15	TVA	Annie et ses hommes	804	12
16	TVA	Caméra café	791	13
17	TQS	Loft Story (samedi 18 h)	785	8
18	TVA	Le TVA 18 heures	754	65
18	TVA	La poule aux oeufs d'or	754	13
20	TVA	Juste pour rire	735	4

# Palmarès des émissions spéciales des réseaux francophones

RANG	RÉSEAU	ÉMISSION	DENSITÉ (000)
1	TVA	Céline Dion: 1 fille & 4 types	1536
2	TVA	Spécial: Occupation double	1524
3	TQS	Spécial: Loft Story	1315
4	TVA	La rentrée TVA	1164
5	TVA	Spécial: Bloopers	1149
6	TVA	La tournée Star Académie: le spectacle	1137
7	SRC	BD 1 - Gala de l'ADISQ	1019
8	TVA	Top 50 Bloopers	1002
9	TVA	Demandes spéciales (sp.: dimanche)	963
10	TVA	Spécial: Bloopers	953
11	TVA	Spécial: Histoires de filles	943
12	TVA	Surprise sur prise	928
13	TVA	Spécial: Km/h	900
14	TVA	Spécial: Wilfred Le Bouthillier	844
15	TVA	7 mensonges de George Bush	775
16	SRC	BD 2 – C'est ça le burlesque	772
17	SRC	BD 1 – La rentrée fait fureur	759
18	TVA	Histoire vraie: "La crise"	749
19	SRC	Spécial: Un gars, une fille	744
20	TQS	Le Grand rire bleu	683



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# The Future of TV Viewing

## Other new technology in the TV world

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- EPGs - Electronic Program Guide
- PVR - Personal Video Recorder
- VOD – Video on Demand
- HDTV – High Definition TV
- ATV – Advanced/Interactive TV

### **Four Primary Areas of PVR Functionality**

- Live TV - pause, rewind
- Recording - advanced VCR functionality
  - search by title, channel, times, description via integrated Electronic Program Guide (EPG)

## Impact on Viewer Behaviour

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- TV schedules, primetime and appointment viewing may become less relevant to both viewers and programmers
- 30-second commercial zapped out of existence
  - Broadcasters find alternatives to traditional commercial revenue such as program sponsorship
  - Producers create programs with product placements in them
- Yet, VCRs have 85% market penetration, but account for only 5.5% of viewing
- PVR may reinforce popularity of existing programming

## Impact on Broadcasters

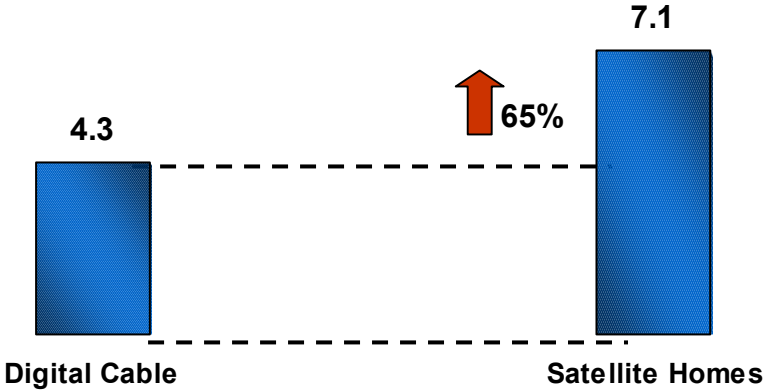
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- Increase in time shifted viewing
  - Freedom from schedules
- Easier to scan or skip commercials
- Title, keyword and category searches
  - EPGs influence viewers

# One possible impact of time shifting



**CBC TV's Share Within Digital Cable  
and Satellite Homes  
October-November, 2003  
7pm - 11pm  
%**



Source: Nielsen Media Research

A prediction...

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While new technology may affect viewing behavior, and especially which stations/services obtain the bulk of viewing, television will continue to be our main source of information and entertainment for some time to come.

Source: CBC Research

