



The Audience to Television in Canada

January 28, 2003

**Presented by: Stan Staple
Director of Corporate Research, CBC**



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How the Data is Gathered:

Diaries vs Meters

BBM vs Nielsen

Diaries

- Less expensive than meters
- Quarter hour is the smallest unit of measurement
- Data are limited to the number of weeks surveyed
- Large sample sizes - can do analysis at market/station level
- Diaries are as accurate and precise as the respondent who filled them out

Meters

- Expensive technology
- Small sample sizes - generally not used for market analysis (except Toronto, Vancouver, Calgary, and Montreal)
- 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

TV Audience Measurement Methodology

	<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 samples for the Fall 2002 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.



Audience Research Jargon

Some Terms That are Used in Audience Research

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

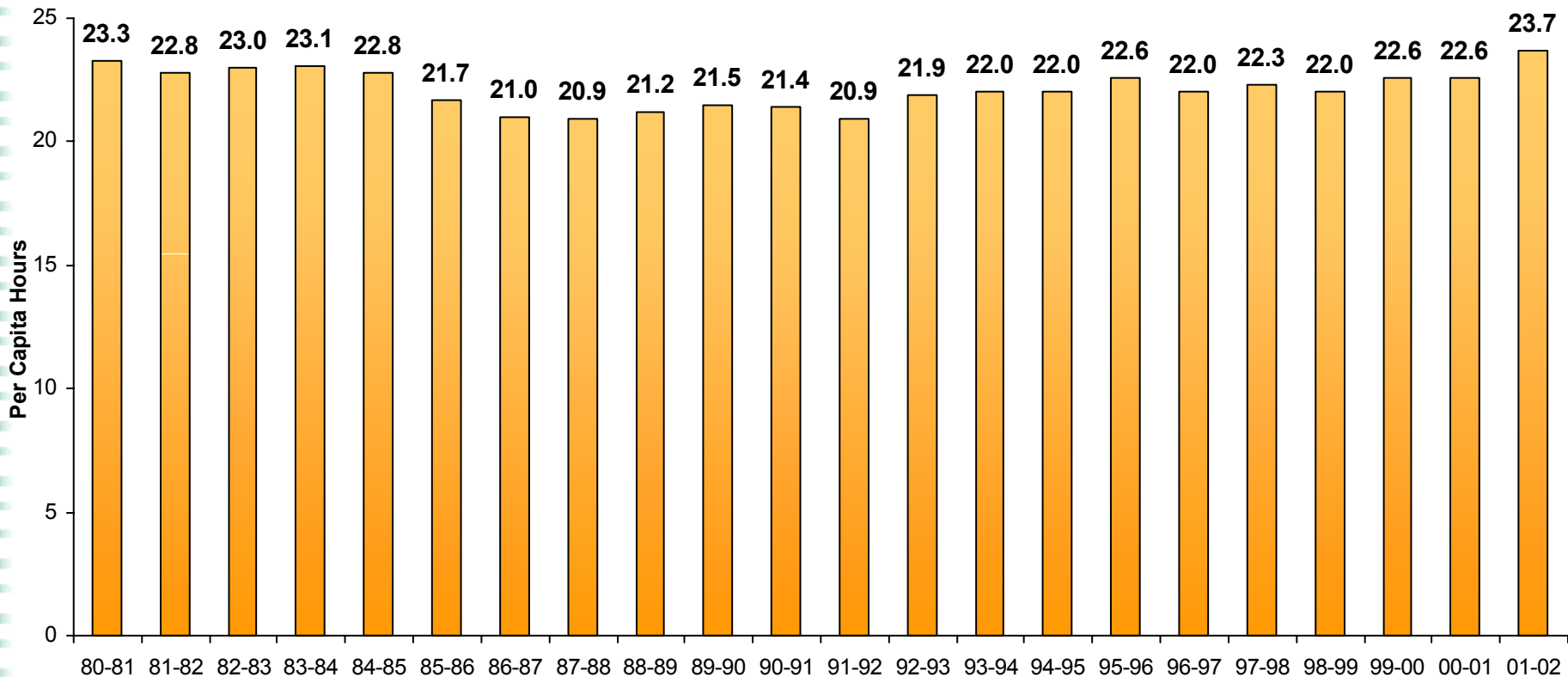
COMPOSITION/PROFILE: An audience broken down by a second variable (e.g. age, gender, occupation, region)



Television Viewing Patterns

Weekly usage of television has increased to its highest level since 1980

Weekly Per Capita Hours Of Viewing To Television All Persons 2+, 1980-81 to 2001-02

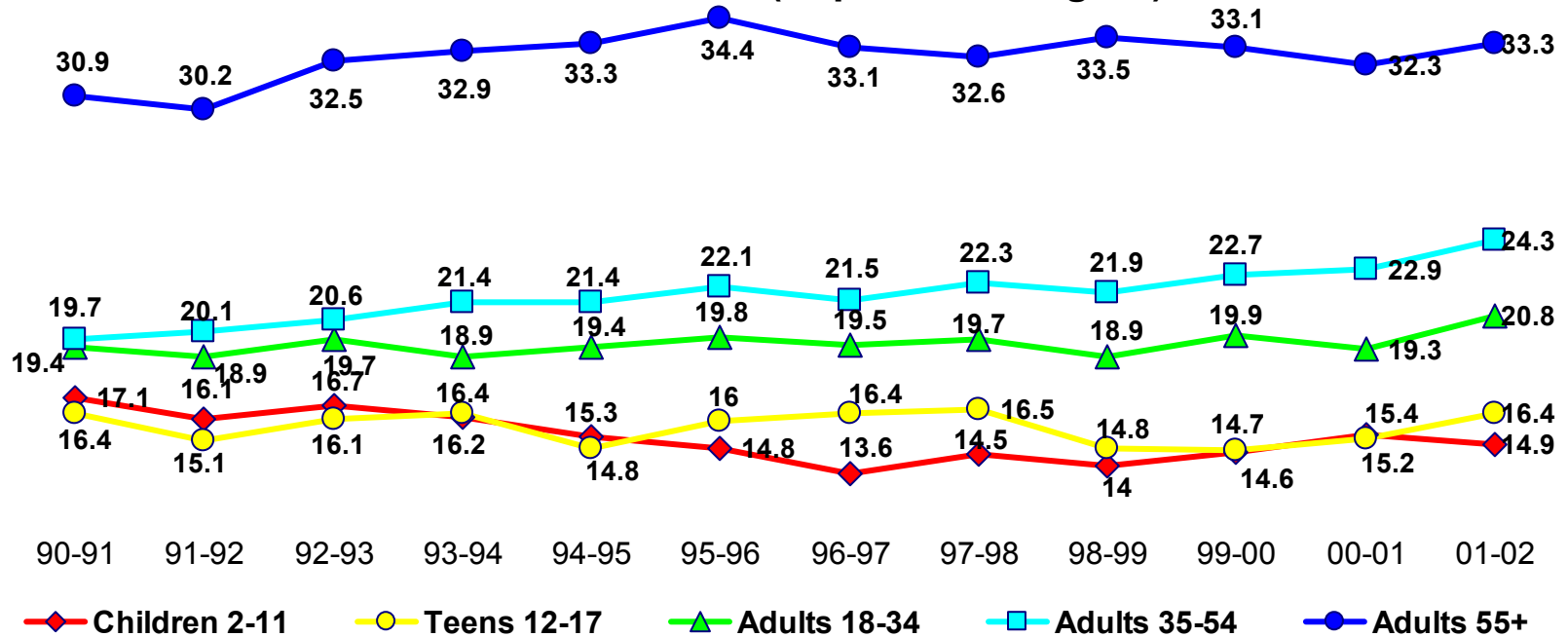


Note: BBM Weekly Per Capita (1980-81 - 1983-84) were adjusted to reflect year round viewing

SOURCE: BBM, Nielsen Media Research, Statistics Canada

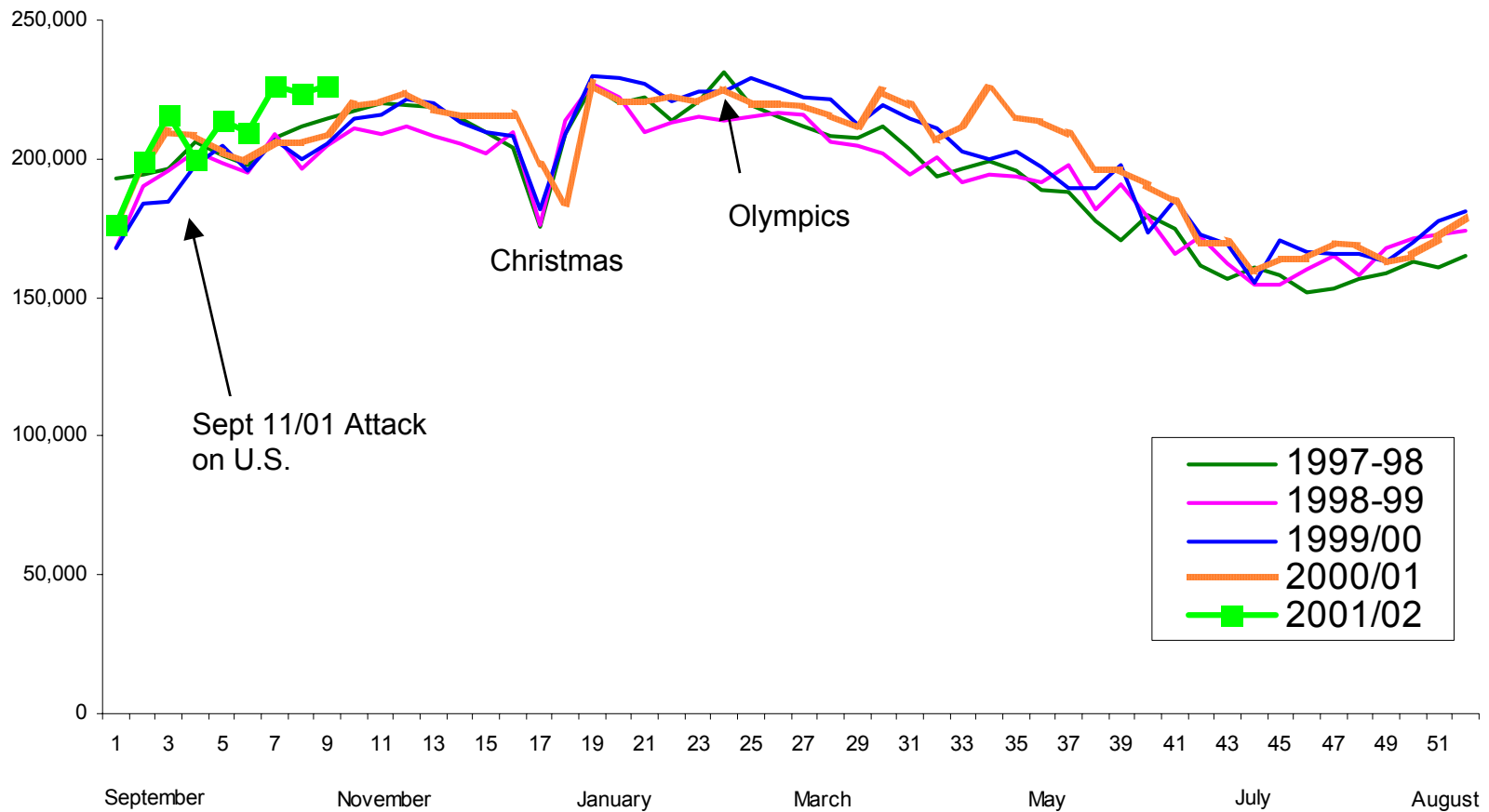
All Canadians, except children aged 2-11, watched more TV in the past year

Weekly Per Capita Hours of Viewing for Selected Demographic Groups 1989-90 to 2000-01 (September-August)

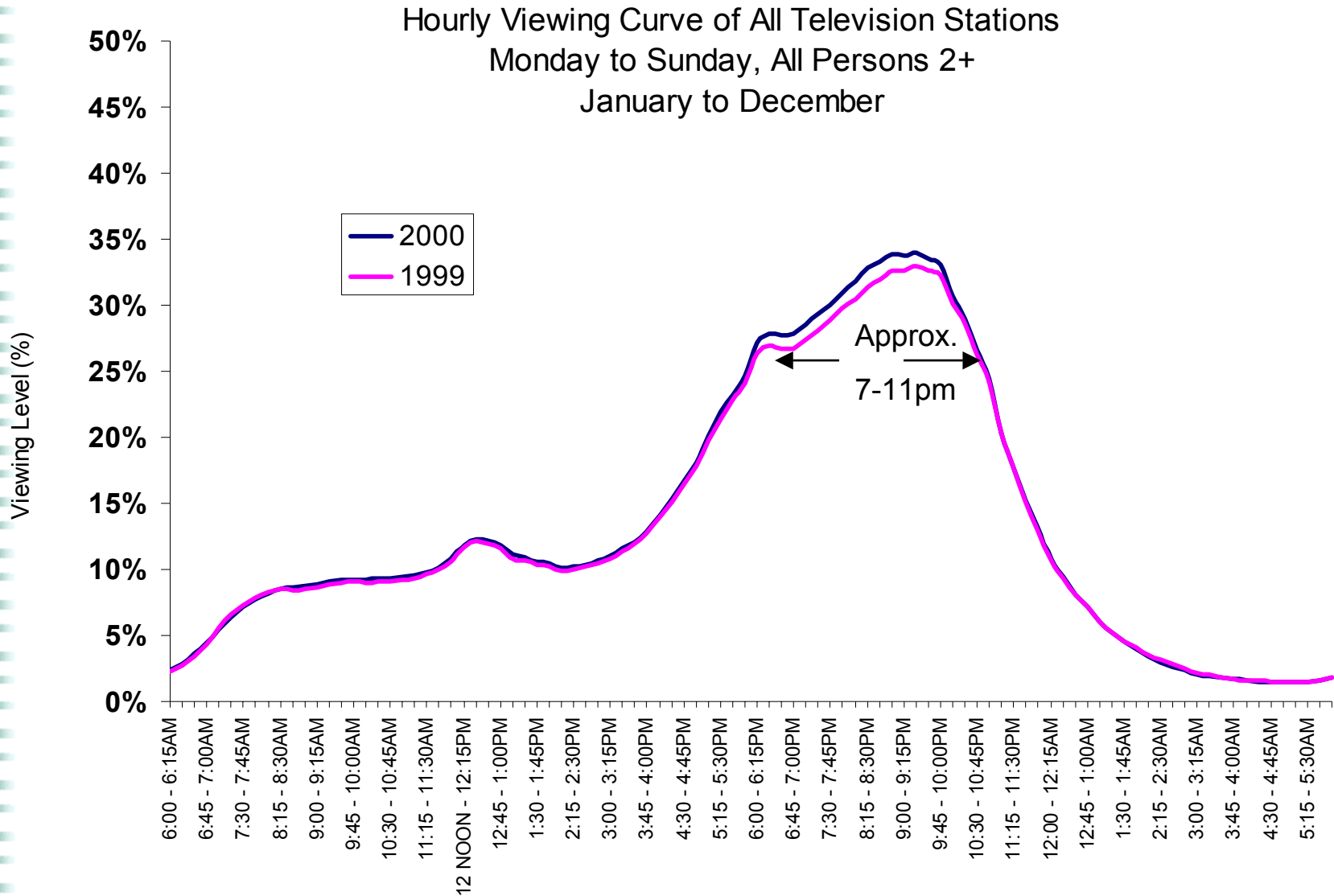


Viewing throughout the year: the effect of special programming & world events

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



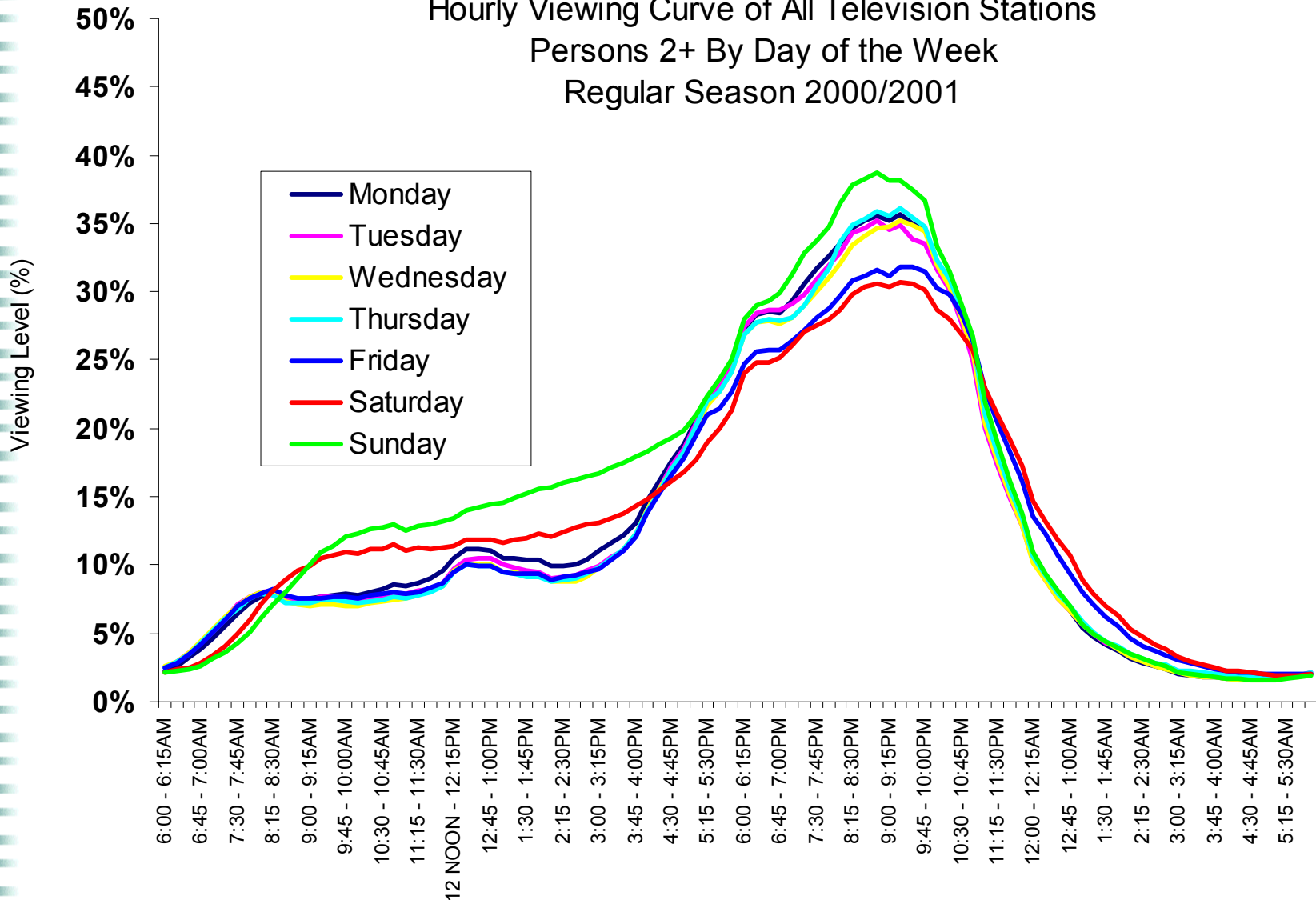
Viewing throughout the day: consistent from year to year



Source: CBC Research (Nielsen Media Research)

Viewing by day: highest viewing on Sundays

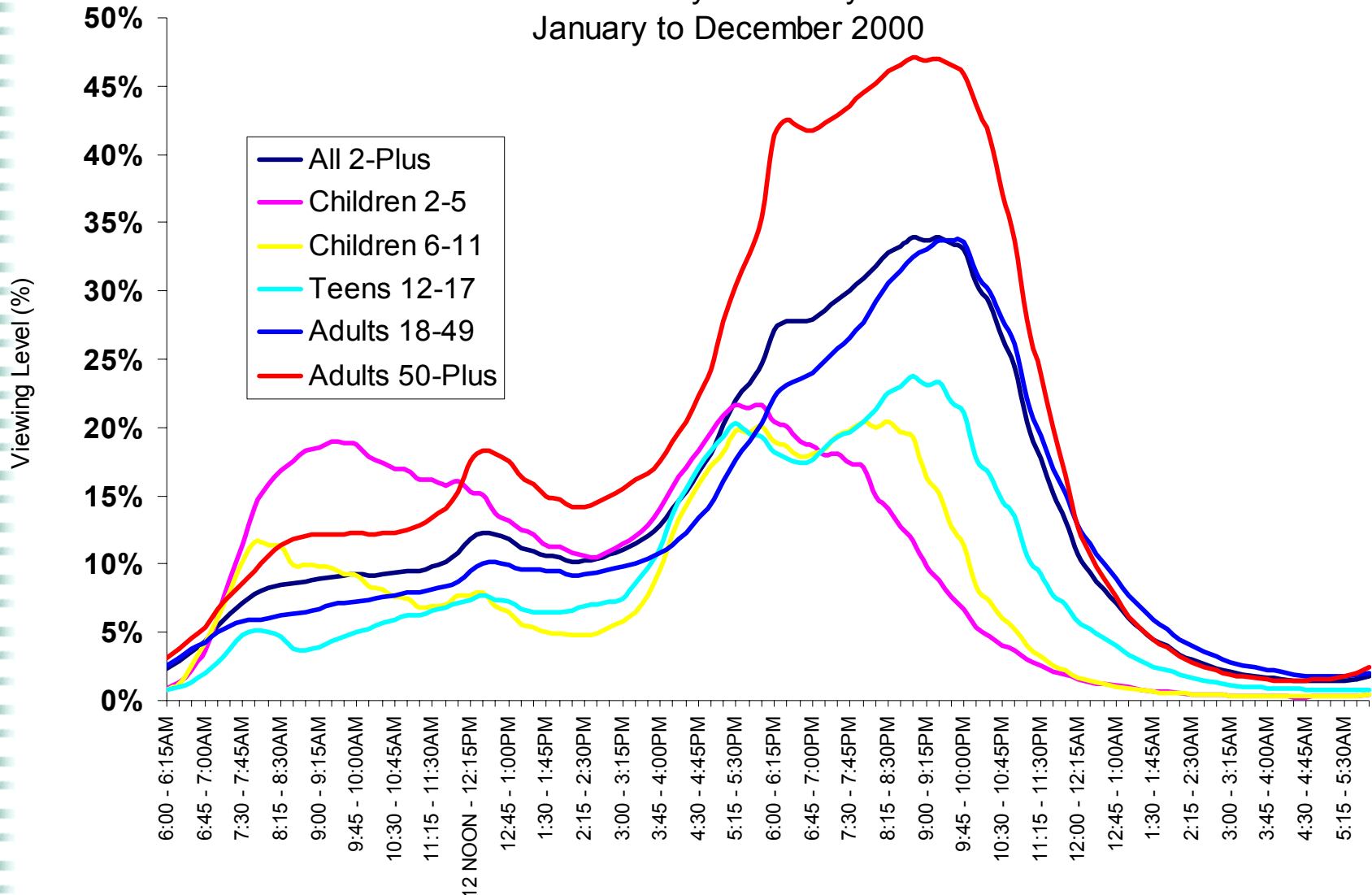
Hourly Viewing Curve of All Television Stations
Persons 2+ By Day of the Week
Regular Season 2000/2001



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

Viewing by age group: kids watch in the morning & afternoon

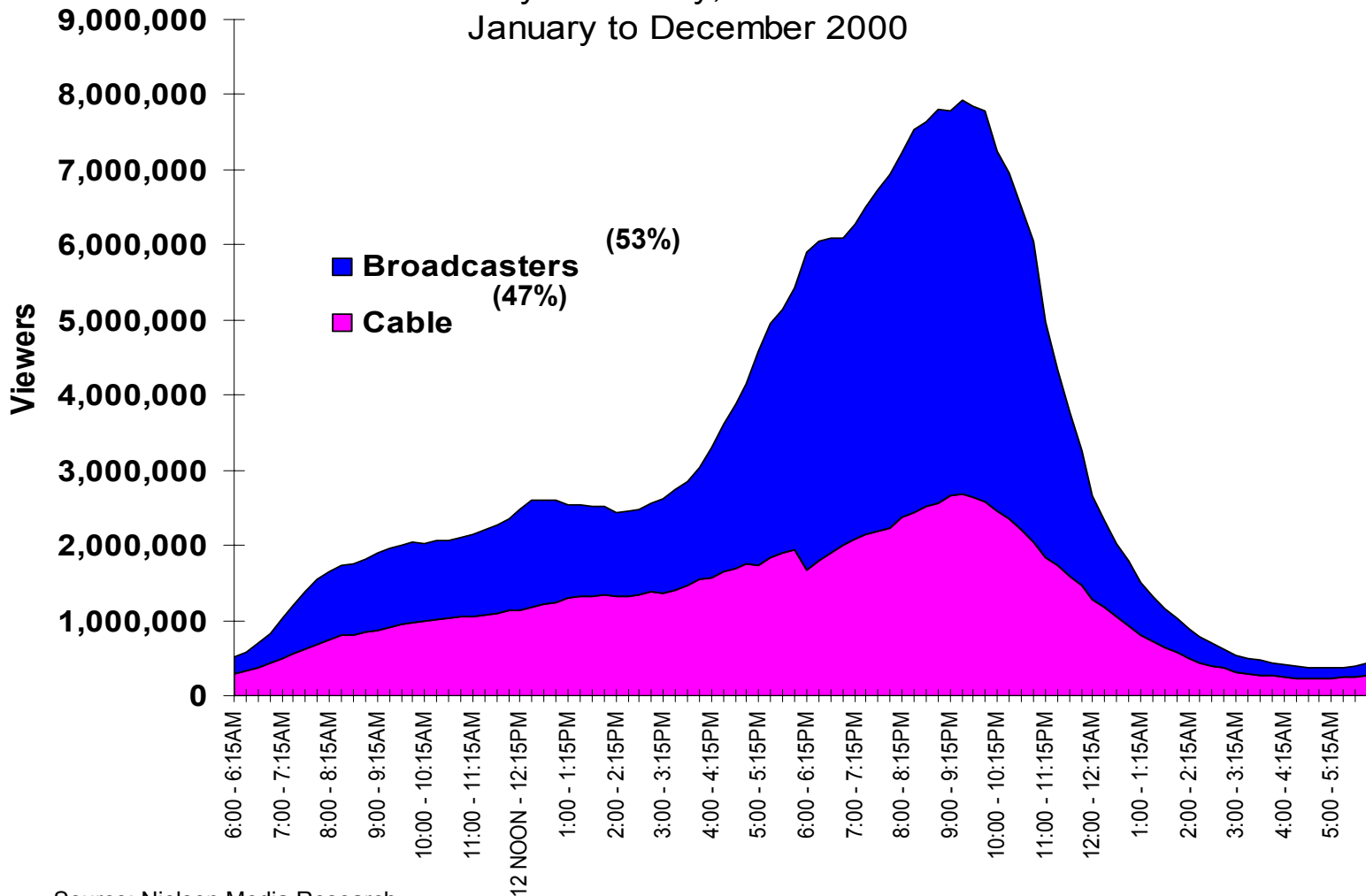
Hourly Viewing Curve of All Television Stations
Monday to Sunday
January to December 2000



Source: CBC Research (Nielsen Media Research)

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

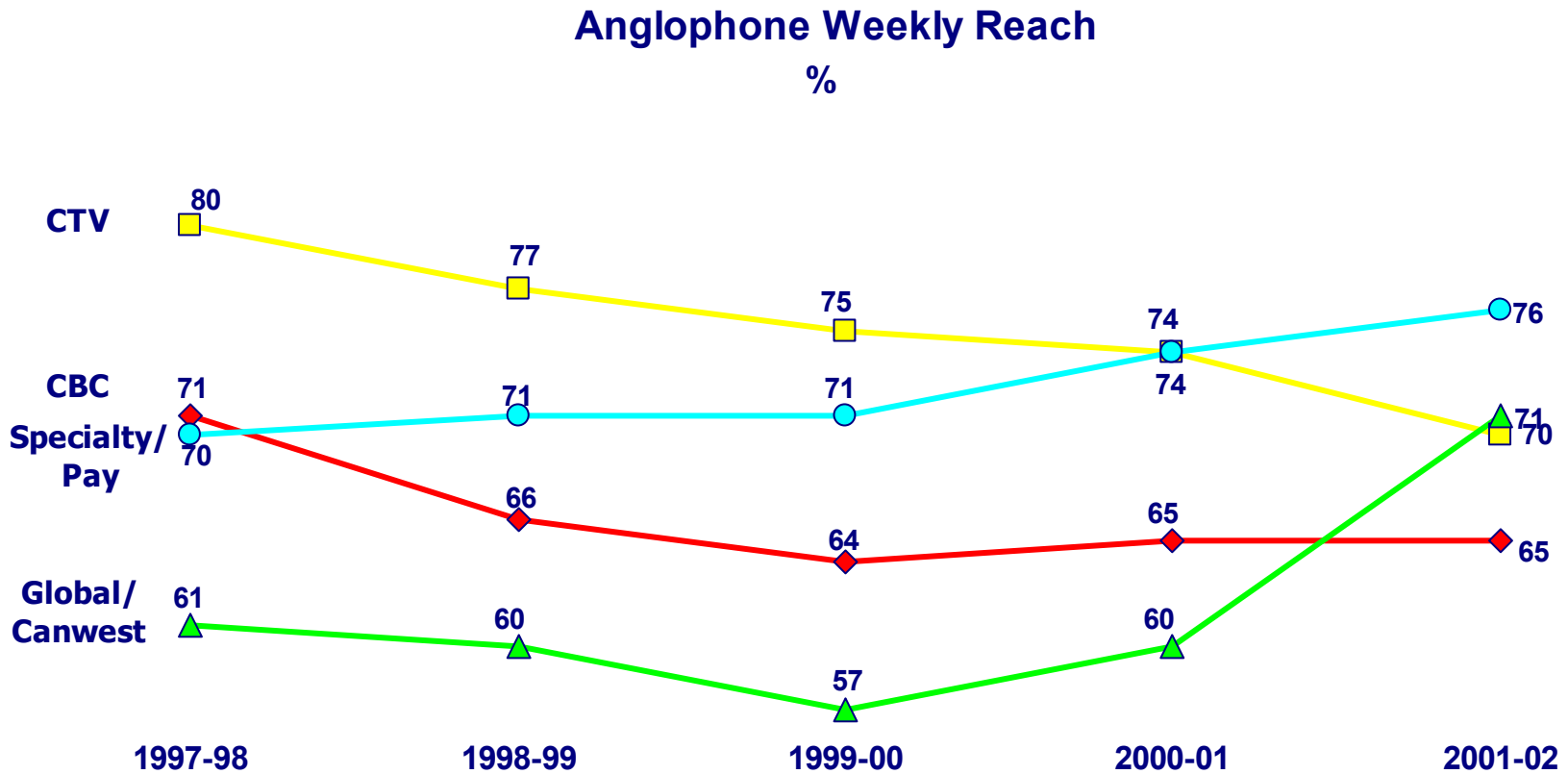


Source: Nielsen Media Research



English Television

The weekly reach of CBC TV has remained stable over the past four years, even though the usage of Specialty Television has continued to grow

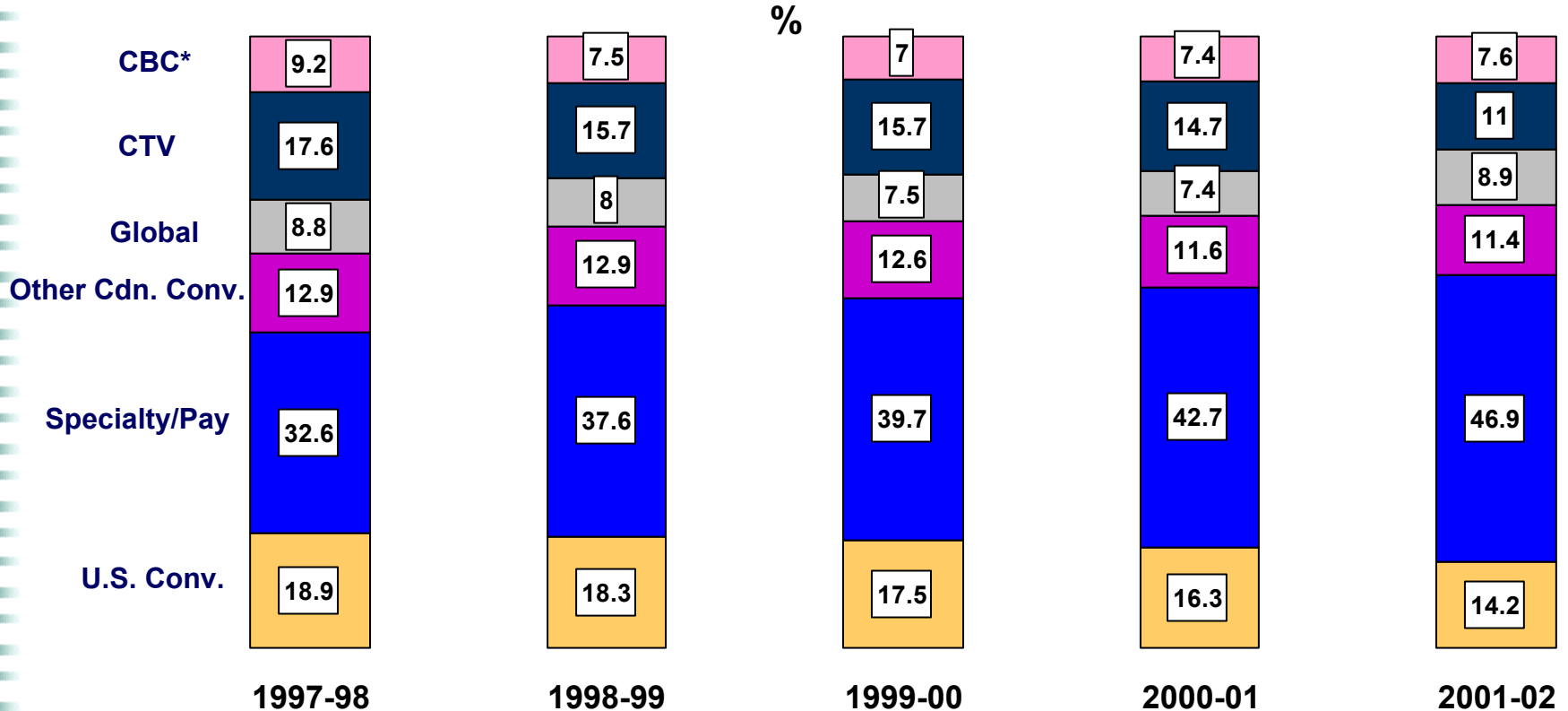


* Excluding Affiliates in own time
'September to August'

Number of different people
tuned to a particular Network for
at least one minute per week

CBC TV's share reached its highest level in four years

Audience Share, All Day (24 Hours)

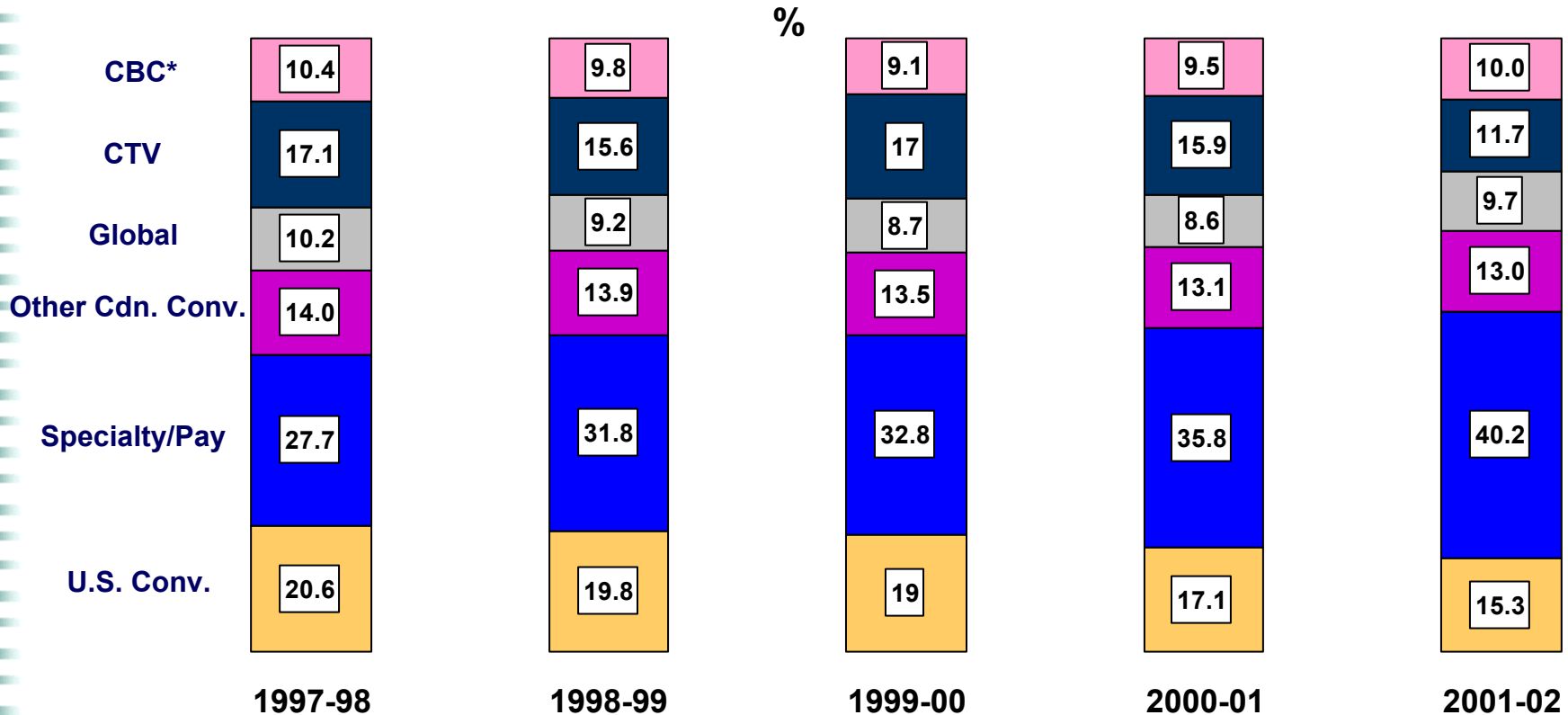


* Excluding Affiliates in own time
'September to August'

SOURCE: Nielsen Media Research

CBC TV's prime time share of 10 per cent was within a half share point of its share five years ago

Audience Share, Prime Time (7-11 pm)



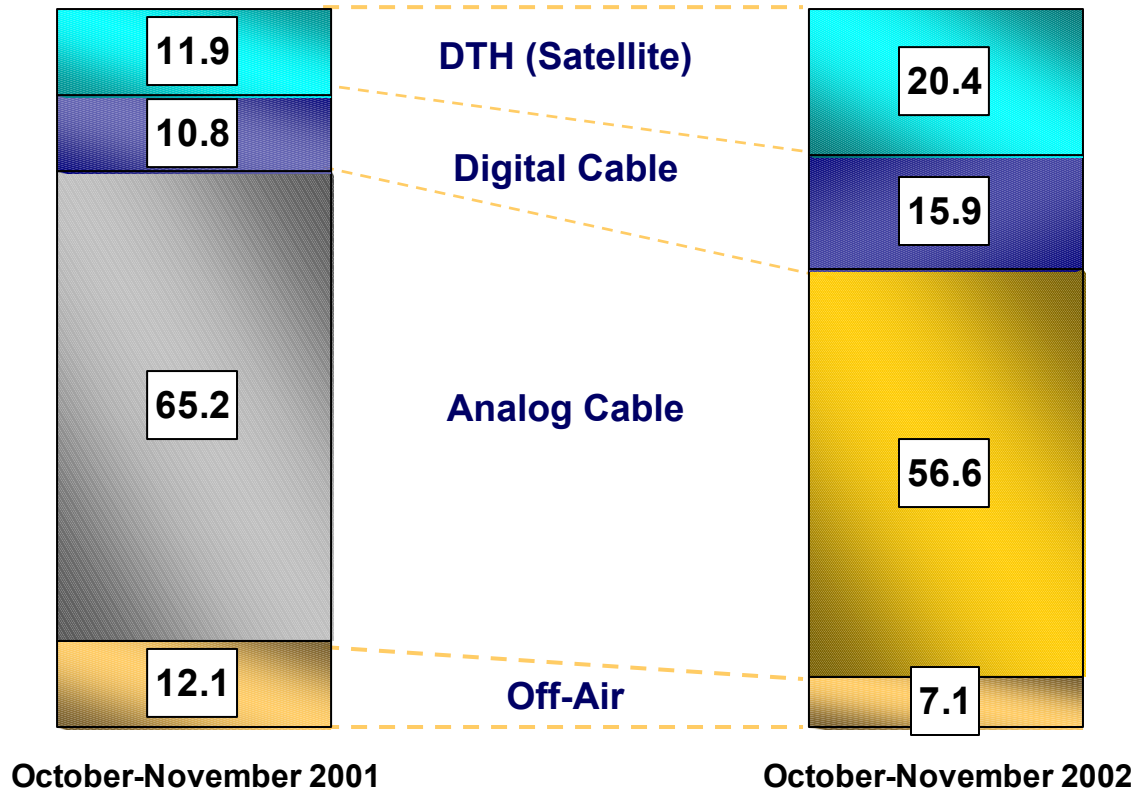
* Excluding Affiliates in own time
'September to August'

SOURCE: Nielsen Media Research

The Viewing Environment Has Changed

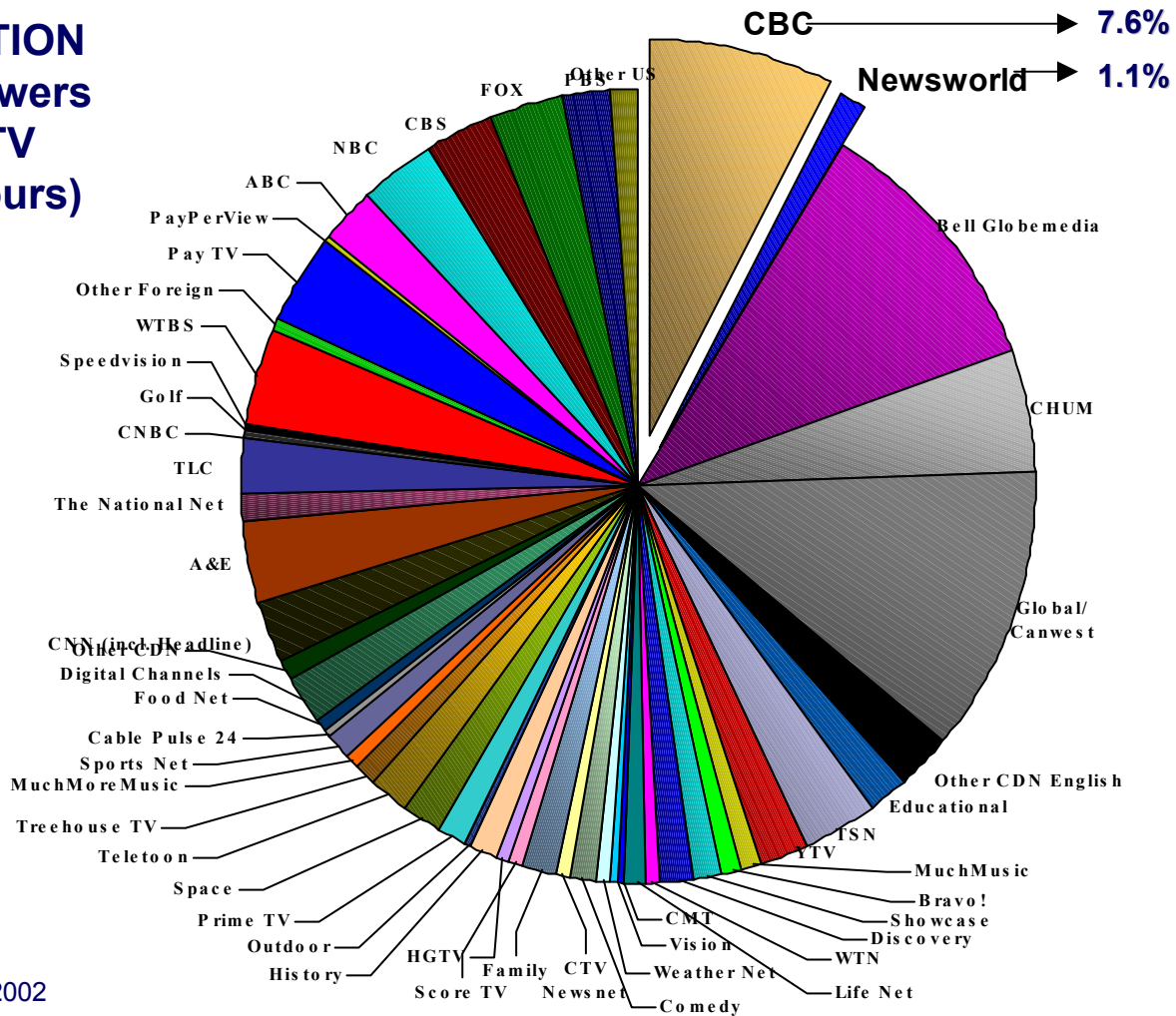
Off-air viewers are subscribing to DTH and analog cable subscribers are switching to digital cable.

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



How much choice is there?

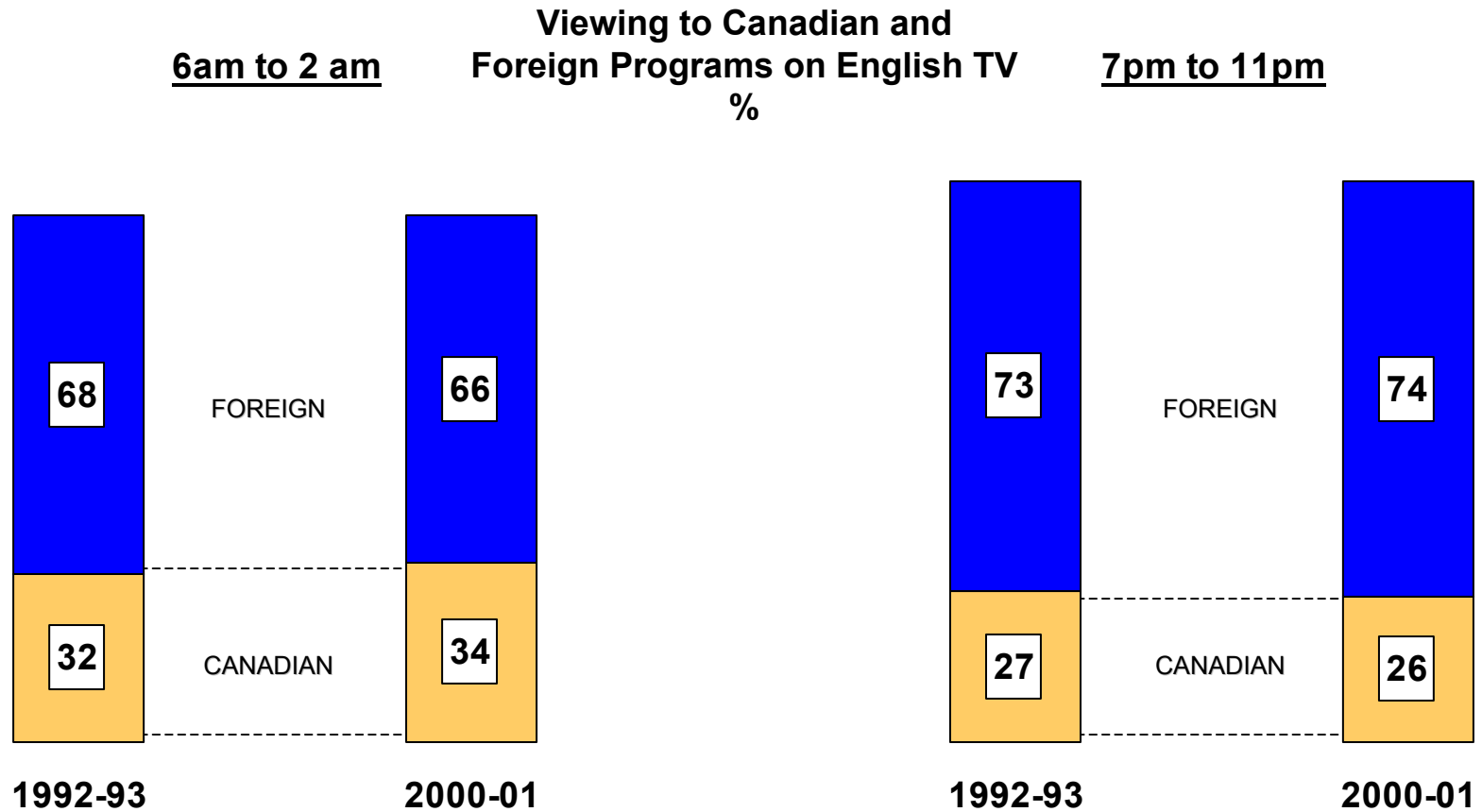
FRAGMENTATION Among All Viewers to English TV All Day (24 Hours) %



September 2001 to August 2002

SOURCE: Nielsen Media Research

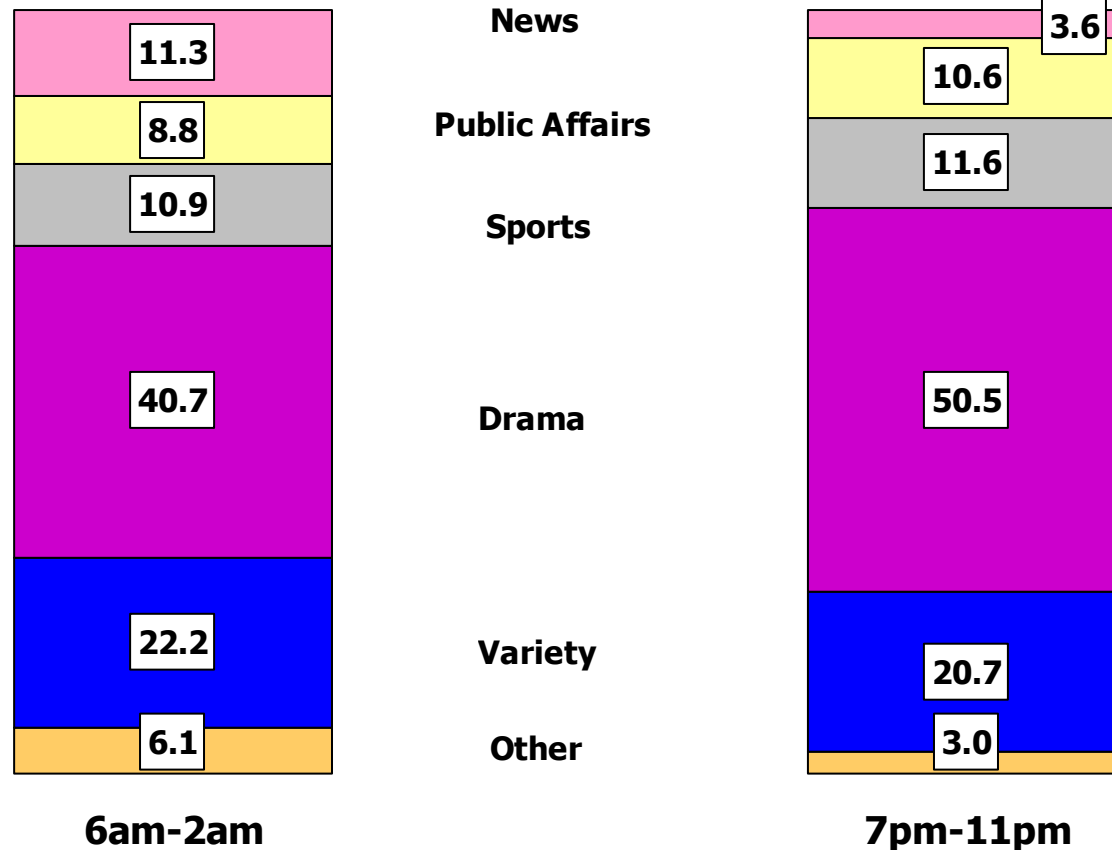
Viewing to Canadian programs on English TV, as a proportion of all viewing, has remained stagnant over the last 10 years.



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

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

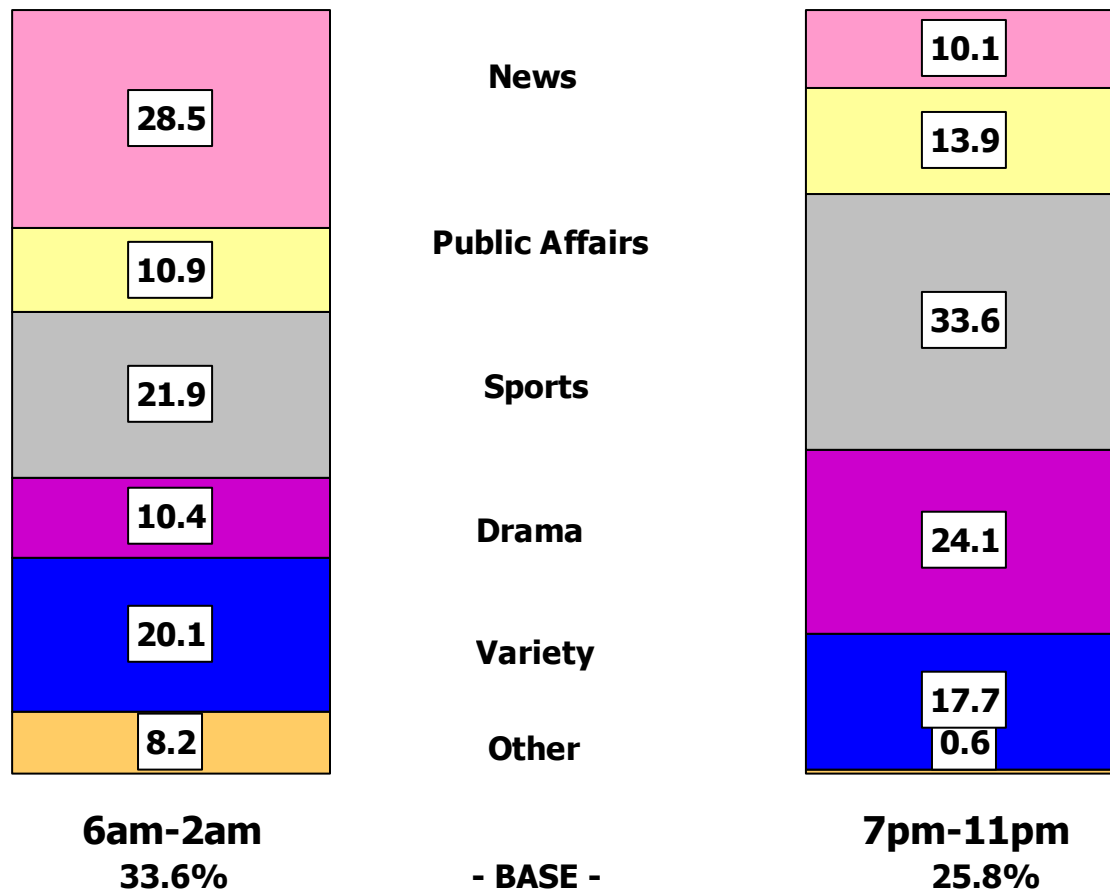
English TV



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



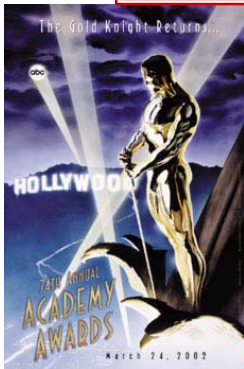
In 1998-99, the base excludes infomercials and lotteries

Source: Nielsen Media Research

2000-2001 was an exceptional year for Canadian programs on English TV

Top 10 Most Popular Programs on English TV

RANK	NETWORK	PROGRAM	AMA (000)
1	CTV	 Academy Awards	4,659
2	CBC	 Olympics Closing Ceremony	4,601
3	CTV	 Academy Awards Pre-Show	3,332
4	CBC	 Olympics Opening Ceremony	2,986
5	CTV	 Golden Globe Awards	2,393
6	CBC	 Grey Cup Game 2001	2,390
7	CBC	 Olympics - Prime Time	2,305
8	CTV	 E.R.	2,046
9	CTV	 Star Wars: The Phantom Menace	1,946
10	CBC	 Trudeau	1,879



CBC TV still dominates the list of top Canadian entertainment series, with seven of the top ten

Audience to Canadian Drama/Comedy Series

RANK	NETWORK	PROGRAM	AMA (000)
1	CBC	Royal Canadian Air Farce	997
2	CBC	This Hour Has 22 Minutes	768
3	CBC	Da Vinci's Inquest	738
4	CBC	Red Green Show	730
5	CTV	Degrassi: Next Generation	576
6	CBC	Tom Stone	518
7	CTV	Cold Squad	507
8	CBC	Just For Laughs (Mon)	467
9	CTV	The Associates	458
10	CBC	Made In Canada	457
11	CBC	Emily of New Moon	449
12	CBC	This Hour Has 22 Minutes (r)	399
13	CBC	Royal Canadian Air Farce (r)	390
14	CTV	Comedy Now	372
15	CBC	Just For Laughs (Fri)	358
16	Global	No Boundaries	331
17	Global	Popstars	327
18	Global	Supermodels	230
19	Global	Psi Factor	186
20	Global	Andromeda	170



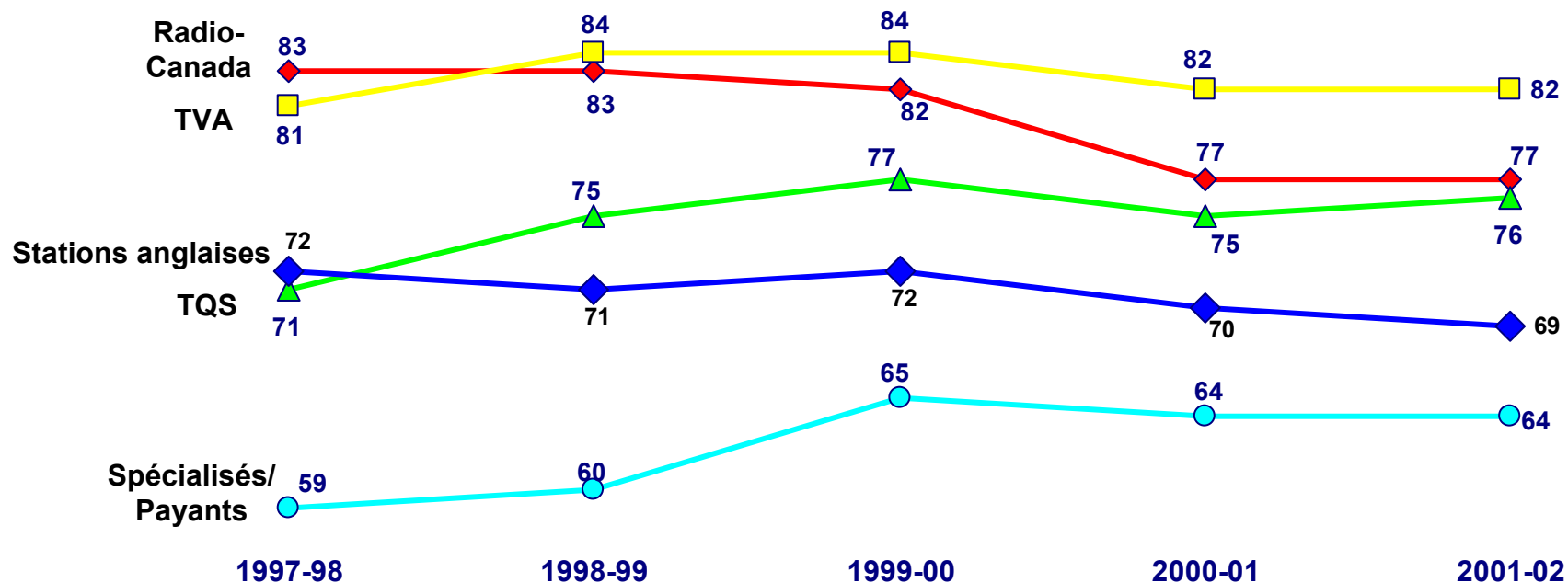
Note: Prime time shows only, September 30, 2001 to April 14, 2002.

SOURCE: Nielsen Media Research

French Television

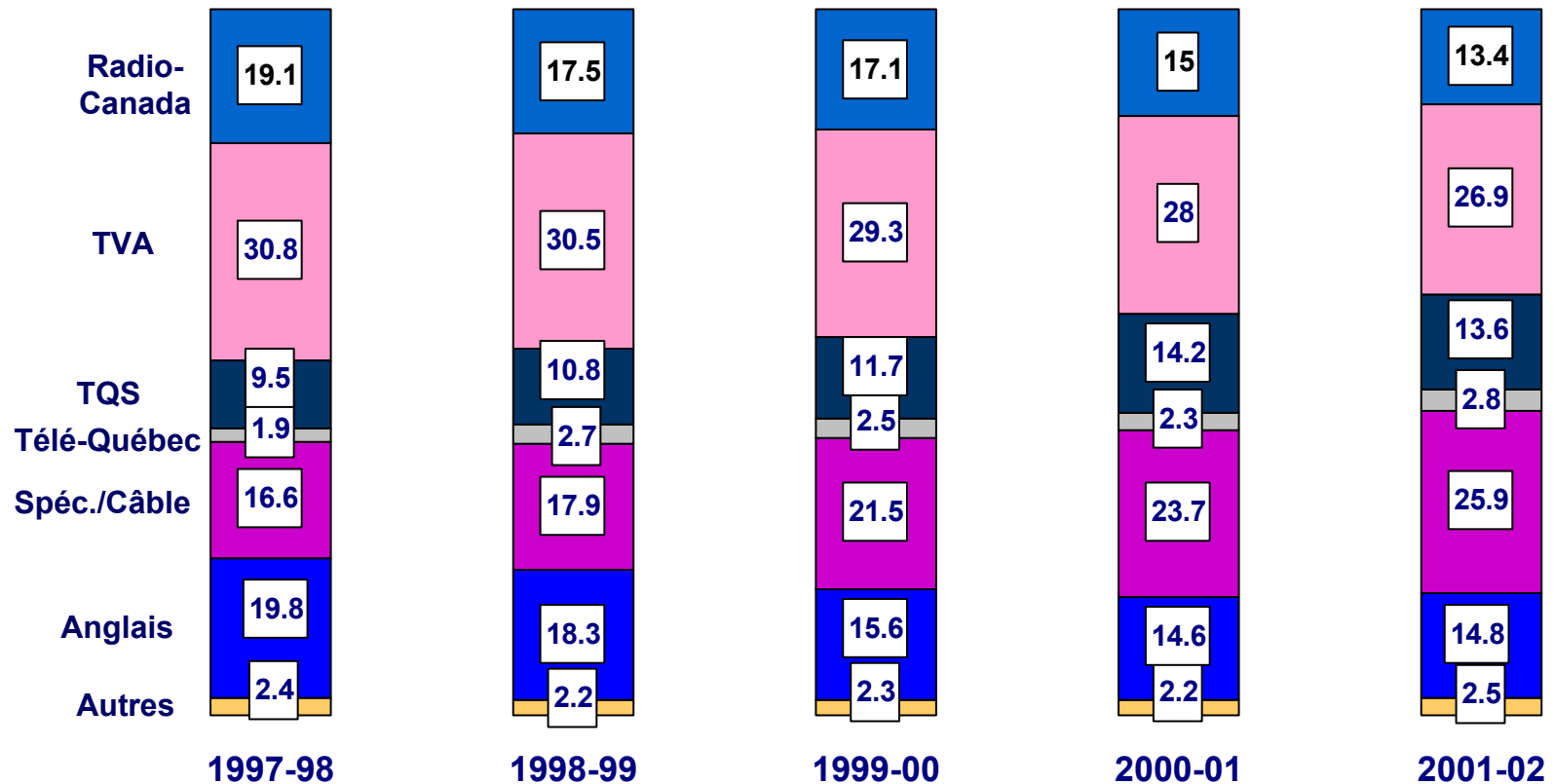
More than three in four francophones tune to Radio-Canada Television each week

Portée Hebdomadaire Francophone %



Fragmentation is taking its toll on the shares obtained by Radio-Canada and TVA

Part francophone (24 heures) %

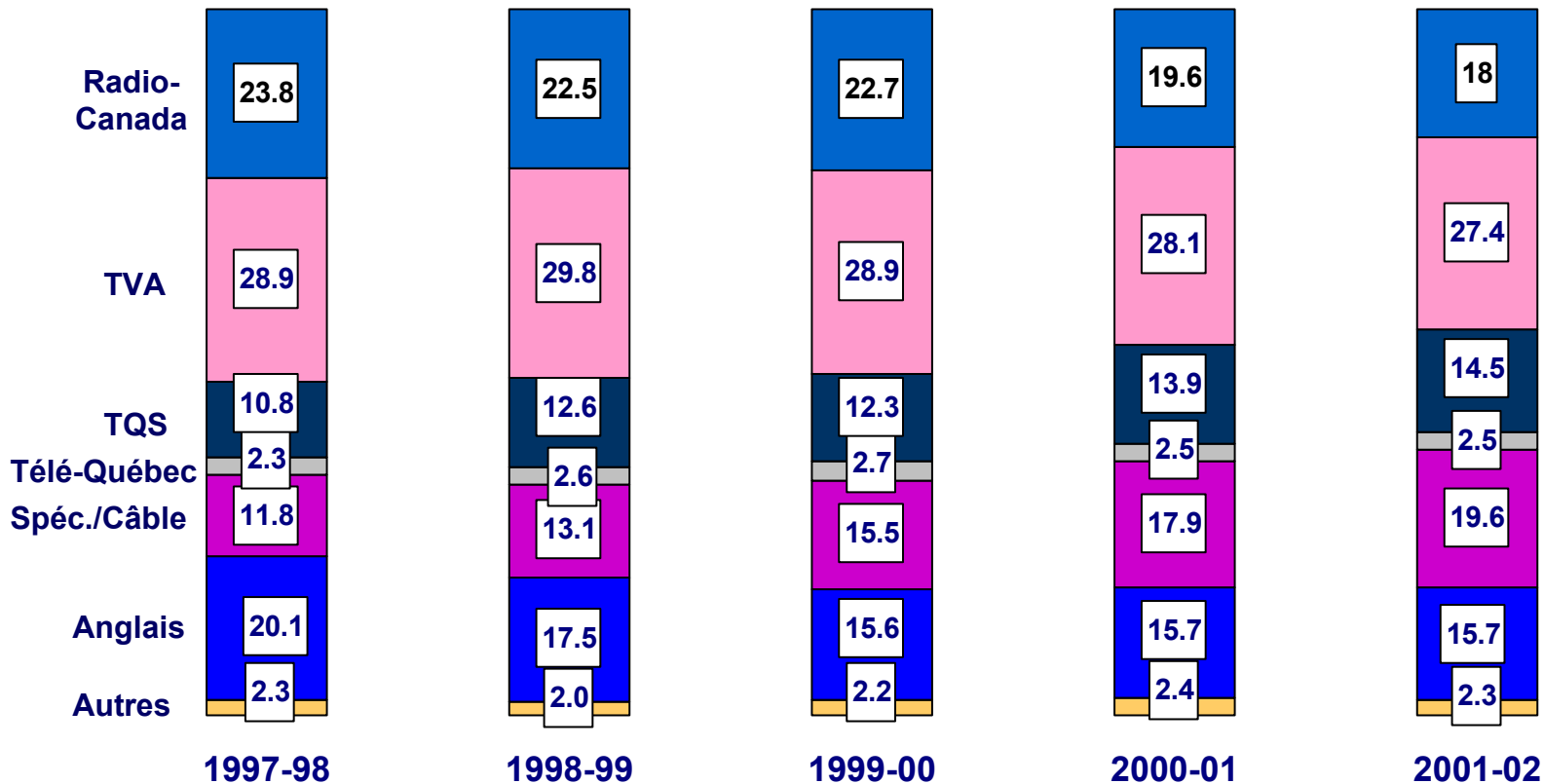


'septembre à août'

SOURCE: Nielsen Media Research

Nevertheless Radio-Canada still obtains almost a fifth of all viewing of francophones in prime time

Part francophone (19h - 23h) %



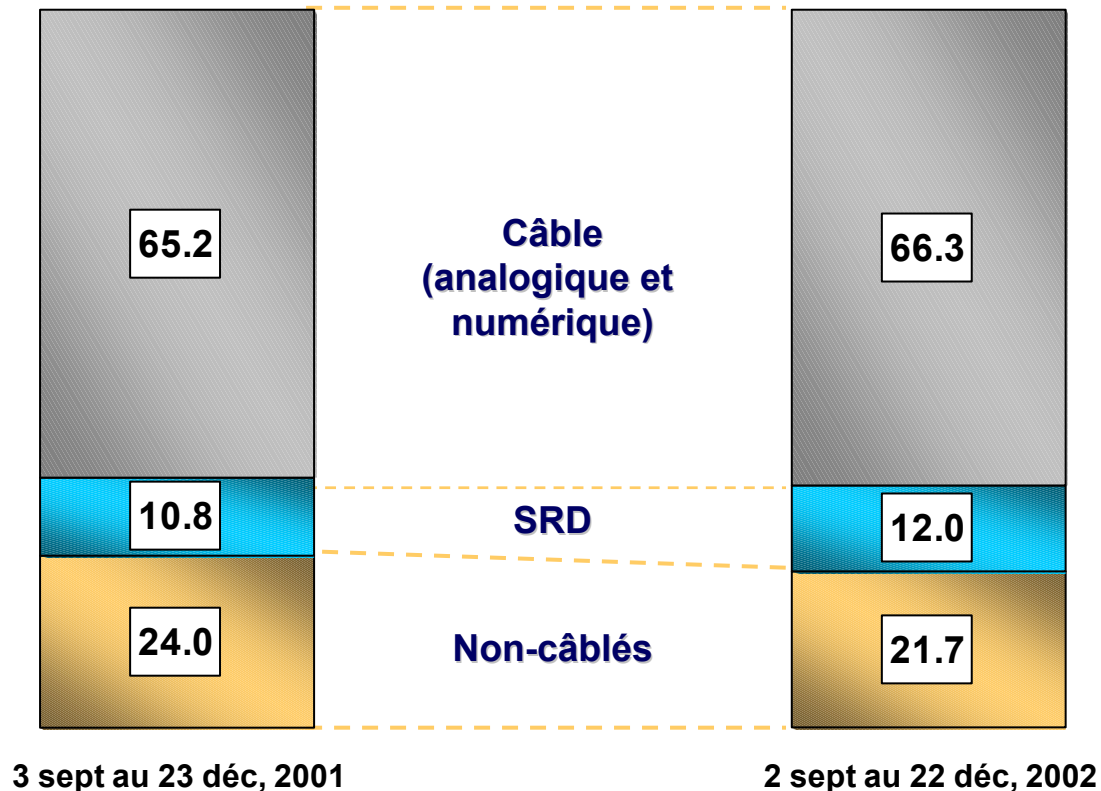
'septembre à août'

SOURCE: Nielsen Media Research

But the francophone Viewing Environment hasn't changed to the same extent

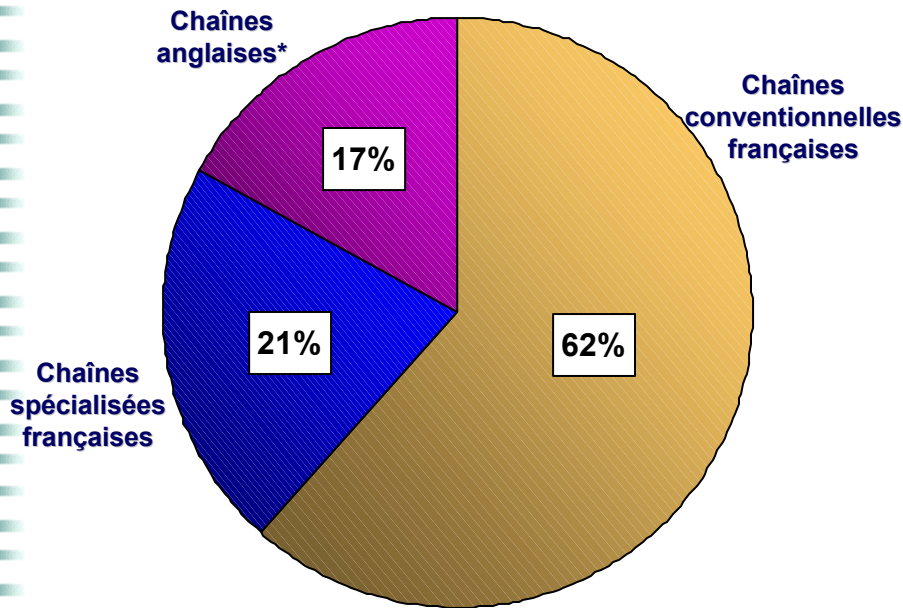
About one-fifth of all viewing by francophones occurs in homes that receive their TV signals over-the-air.

Distribution de l'écoute auprès des francophones selon l'environnement télévisuel
lundi-dimanche, 24 heures
Automne 2001 & automne 2002
%



Does fragmentation affect the English and French TV markets in the same way?

**Fragmentation de l'écoute francophone
24 heures
%**

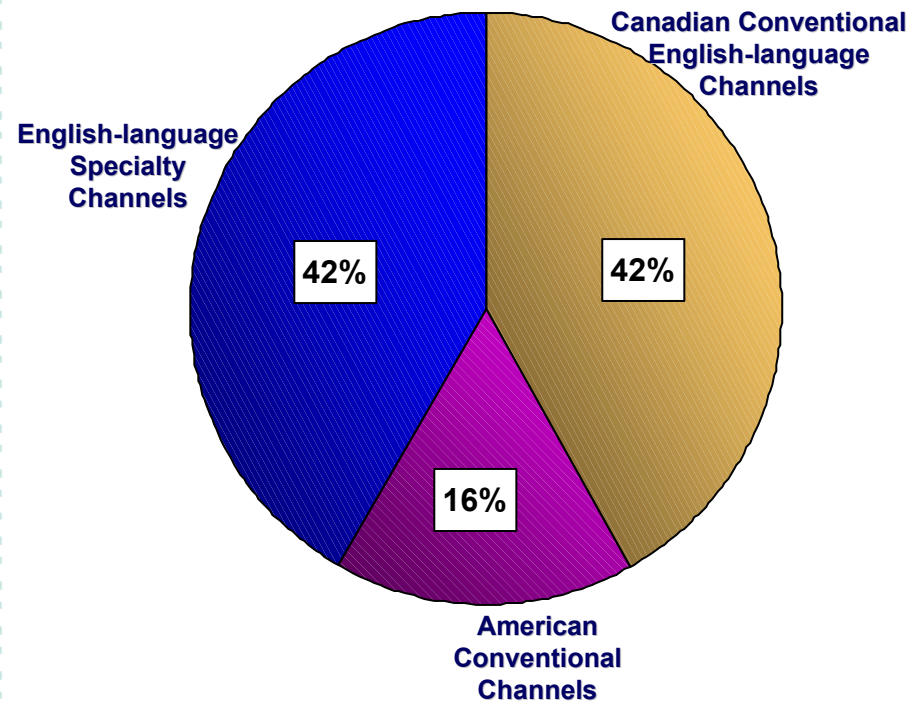


*Comprend les chaînes multilingues/ethniques

Septembre 2000 à la fin mars 2001

Source: Recherche Média Nielsen

**Fragmentation of English
Television Viewing
24 Hours
%**

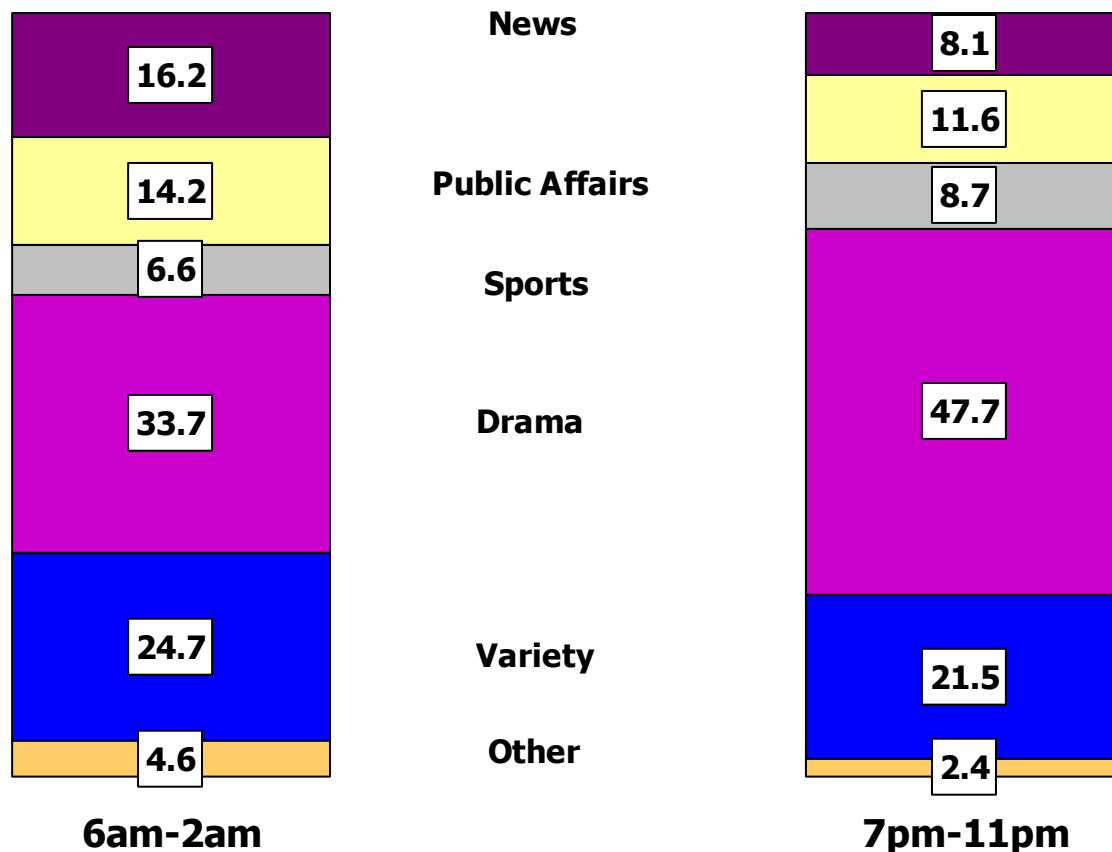


September 2000 to end of March 2001

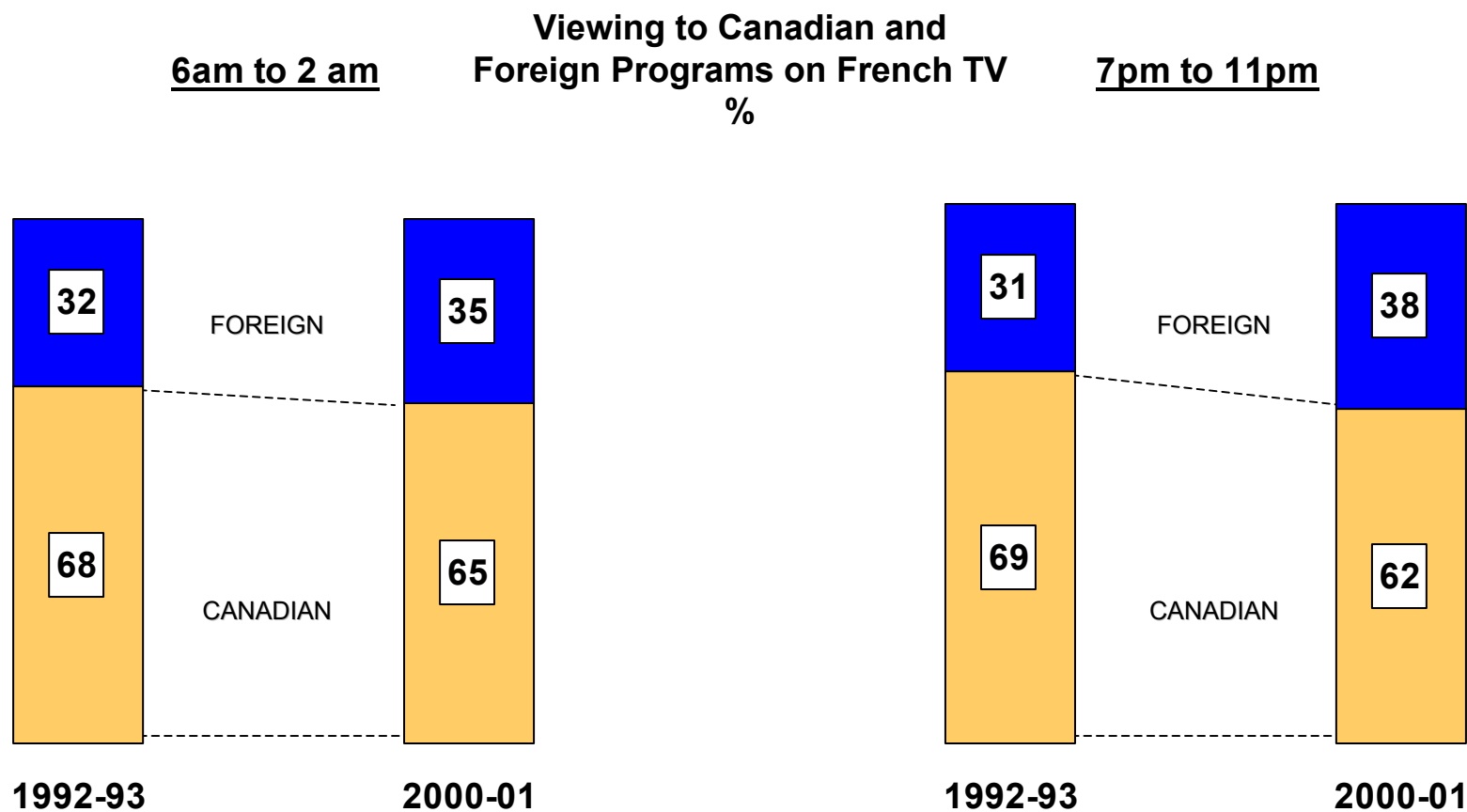
Entertainment programs (drama & variety) account for almost three-fifths of all viewing to French TV over the whole day and two-thirds in prime time

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

French TV



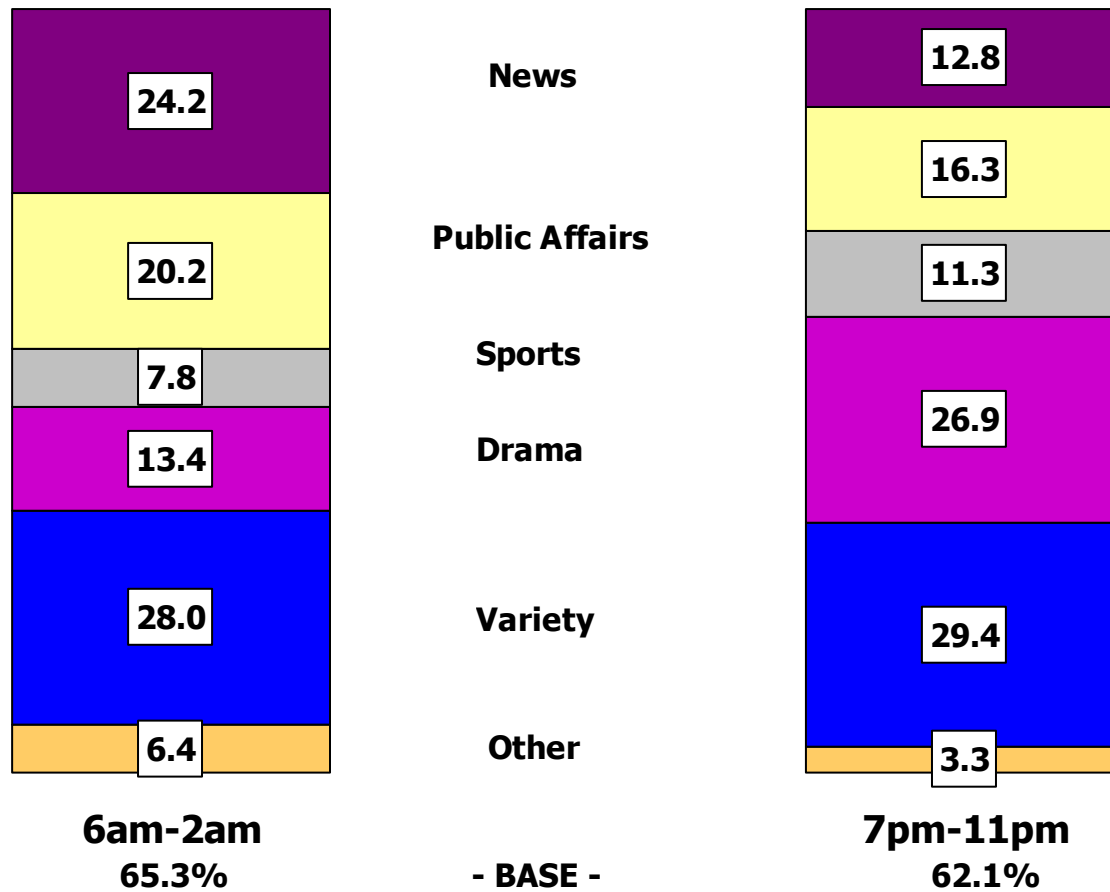
There has been a decline, especially in prime time, in the viewing of Canadian programs on French TV.



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



Competition is fierce between Radio-Canada and TVA for viewers to Canadian entertainment series

Palmarès des émissions régulières des réseaux francophones



RANG	RÉSEAU	ÉMISSION	# diffusions	DENSITÉ (000)
1	TVA	Fortier	5	1 928
2	TVA	Le Retour	10	1 701
3	TVA	KM/H	25	1 525
4	SRC	Music Hall	4	1 521
5	TVA	Les poupées russes	12	1 464
6	TVA	Tabou	5	1 444
7	TVA	Histoires de filles	25	1 394
8	TVA	Cauchemar d'amour	7	1 393
9	TQS	Lance et compte III	6	1 263
10	TVA	Tribu.com	18	1 153
11	TVA	Juste pour rire	9	1 134
12	SRC	L'Or	10	1 130
13	SRC	Un gars, une fille	24	1 101
14	TVA	Emma	24	1 040
15	SRC	Le dernier chapitre	4	1 005
16	SRC	La fureur	23	991
17	TVA	Arcand	27	989
18	TVA	Si la tendance se maintient	5	980
19	SRC	La vie, la vie	23	978
20	TVA	La poule aux oeufs d'or	30	962
21	SRC	Mon meilleur ennemi	23	959
22	TVA	Max Inc.	6	944
23	SRC	La facture	25	904
24	TVA	Avoir su...	21	890
25	SRC	Virginie	27	853





The Future of TV Viewing

Other new technology in the TV world

- 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

- 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

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

A prediction...

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

