

Trends in Canadians' Use of TV

Prepared by Canadian Media Research Inc.
for the Canadian Film and Television
Production Association

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Television Audience Trends

Viewing to English-Language Television
by Canadians, 1990 to 2000

Notes: Statistics Canada provided a special analysis of BBM data for this study. Each year the CRTC and Statistics Canada code all fall BBM viewing data by program origin and type. This database dates back to 1983 and is invaluable for studying trends in viewing to Canadian content.

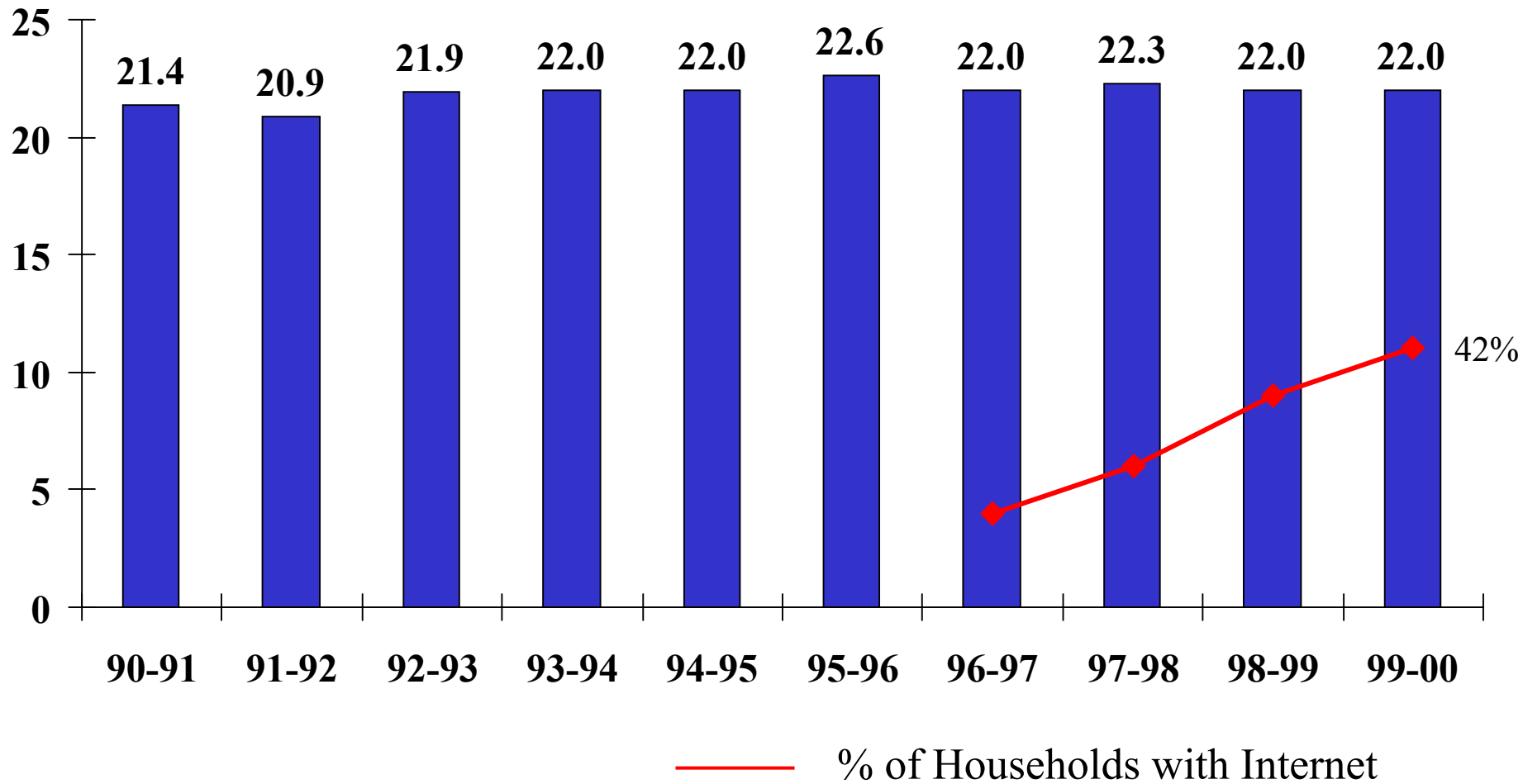
BBM and Nielsen viewing data are collected using different methodologies. Each has its strengths and shortcomings. In the following, BBM, which uses a ‘weekly diary’ methodology, is the primary source in the analysis of overall trends in Canadian program viewing. BBM data are collected for selected periods of the year, which are considered to be representative of peak viewing months. Nielsen uses a ‘people meter’ to collect viewing data. Nielsen data are used here to trend viewing levels and market share and for historical reference. Nielsen data cover 52-weeks per year. BBM is for the period 6am-2am, whereas Nielsen measures 24 hours. Data herein are for these ‘whole day’ time periods, unless otherwise indicated. All data are for persons aged 2-plus unless specified otherwise.

For the purposes of this study, *drama* refers to hour-long series, feature films, made-for-TV movies and soap operas, while *comedy* includes sitcoms, sketch and stand-up comedy.

- On average, Canadians spend about 22 hours per week using television
- TV usage has not been affected by the Internet, despite the fact that some 42% of Canadian households subscribed to the Internet at the end of 2000

WEEKLY PER CAPITA HOURS OF TV VIEWING

ALL PERSONS 2-PLUS, 1990-2000



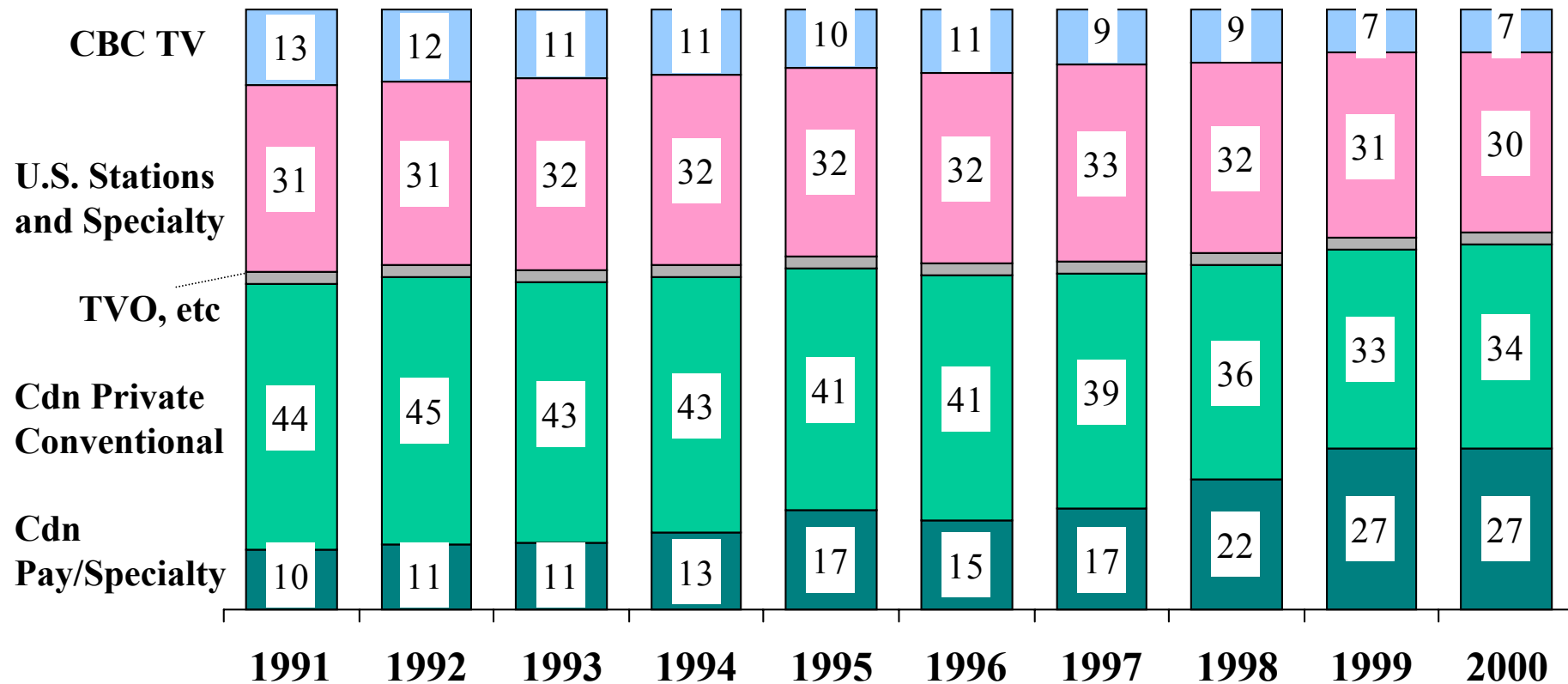
During the past ten years:

- U.S. stations, which are available to most Canadian viewers via cable and satellite, continue to capture about 30% of English TV viewing
- The introduction of new services, especially new Canadian specialty services in 1995 and 1997, has resulted in significant loss of audience by both the CBC (from 13% to 7%) and privately-owned conventional Canadian television stations (from 44% to 34%)

- However, many of the new Canadian specialty services, which have grown from a combined 10% share to 27%, are owned by private broadcasters
- In 2000, Canadian private TV stations and pay and specialty services had a combined audience share of 61% versus 54% in 1991

Audience Share of English-language Station Groups 1991-2000

%



Source: CMRI (Nielsen)

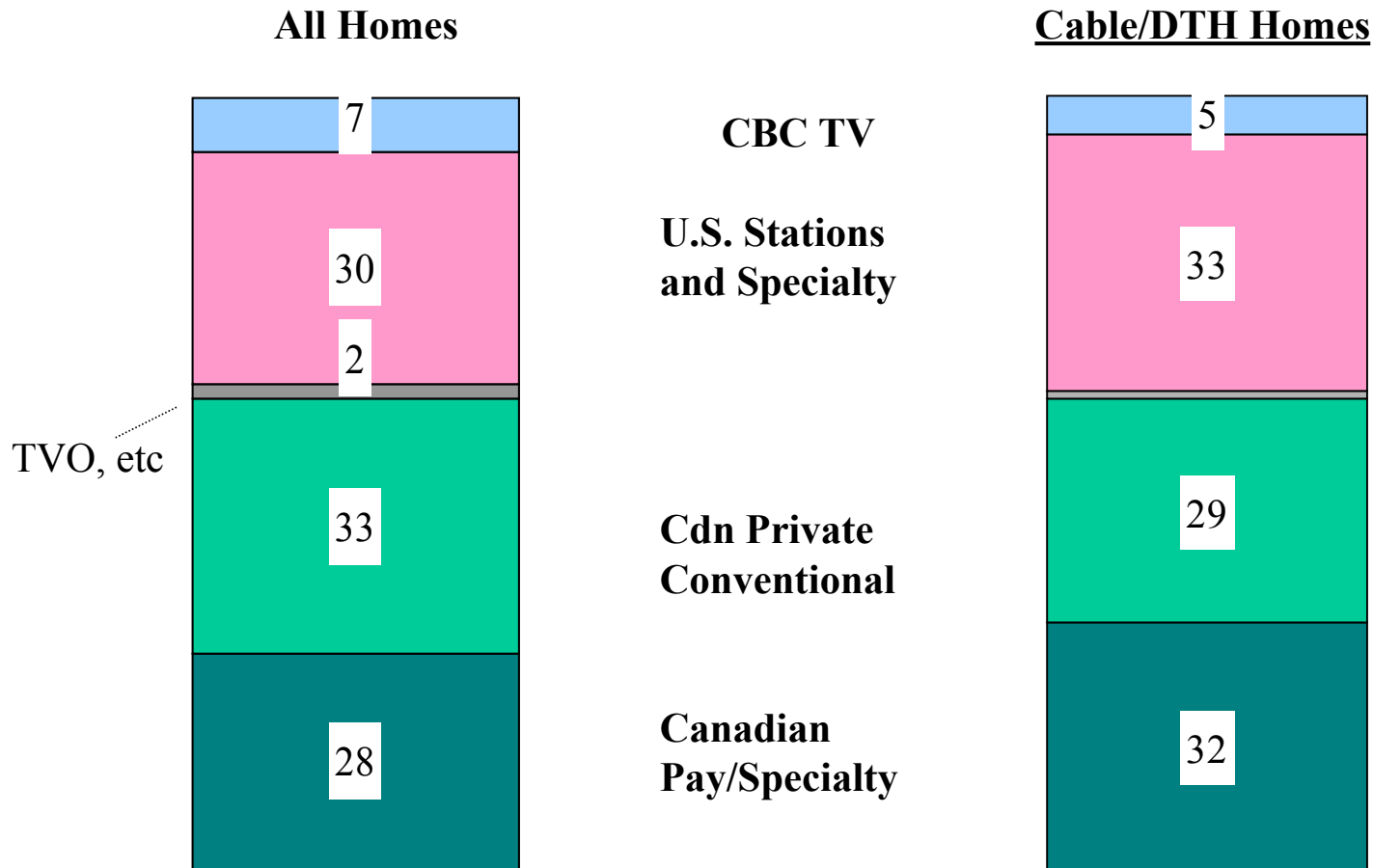
Note: Canadian Private Specialty TV category includes Newsworld, which has approx. a 1% share

- In homes equipped with cable or satellite (i.e., 3 out of 4 homes in Canada), Canadian private broadcasters and Canadian pay and specialty channels have maintained their combined share of 61%
- US networks and specialty channels have a larger share (33%) in cable/DTH homes
- US specialty services account for about half the U.S. total audience share -- these channels collect substantial subscriber fees in Canada

Audience Share of English TV within Cable/DTH Households, All Persons 2-plus

September-March 2000-01

%



Source: CMRI (Nielsen)

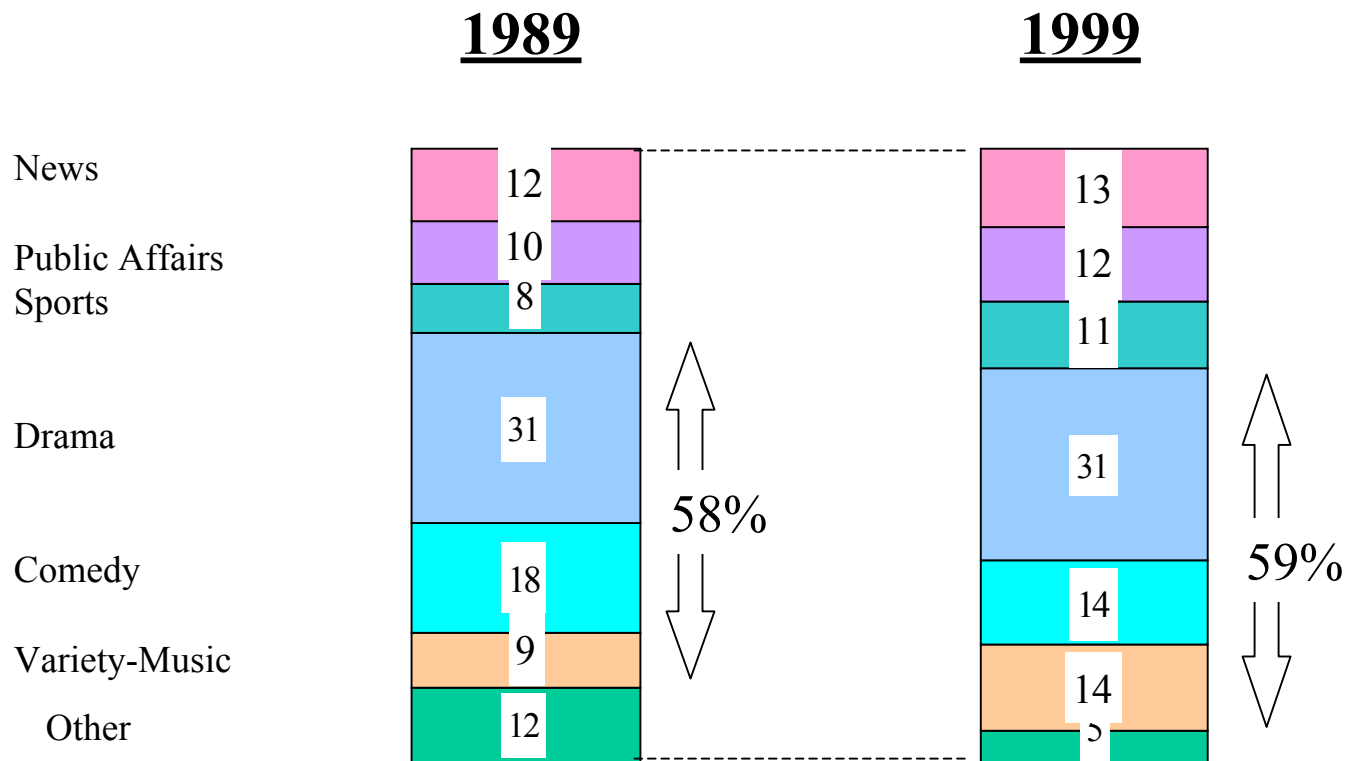
Canadian Content Viewing Trends 1990 - 2000

Time spent with different categories of program on TV has not changed much in the past ten years:

- The entertainment genres--*Drama, Comedy, Variety-Music, etc.* still account for the greatest audience share, about 60% combined
- *News, Public Affairs* and *Sports* combined account for about 35% of total TV viewing
- The remainder goes to *Other* program types which consists of Educational/Instructional, religious and miscellaneous

Audience Share of Different Types of Programs On English-language Television

%

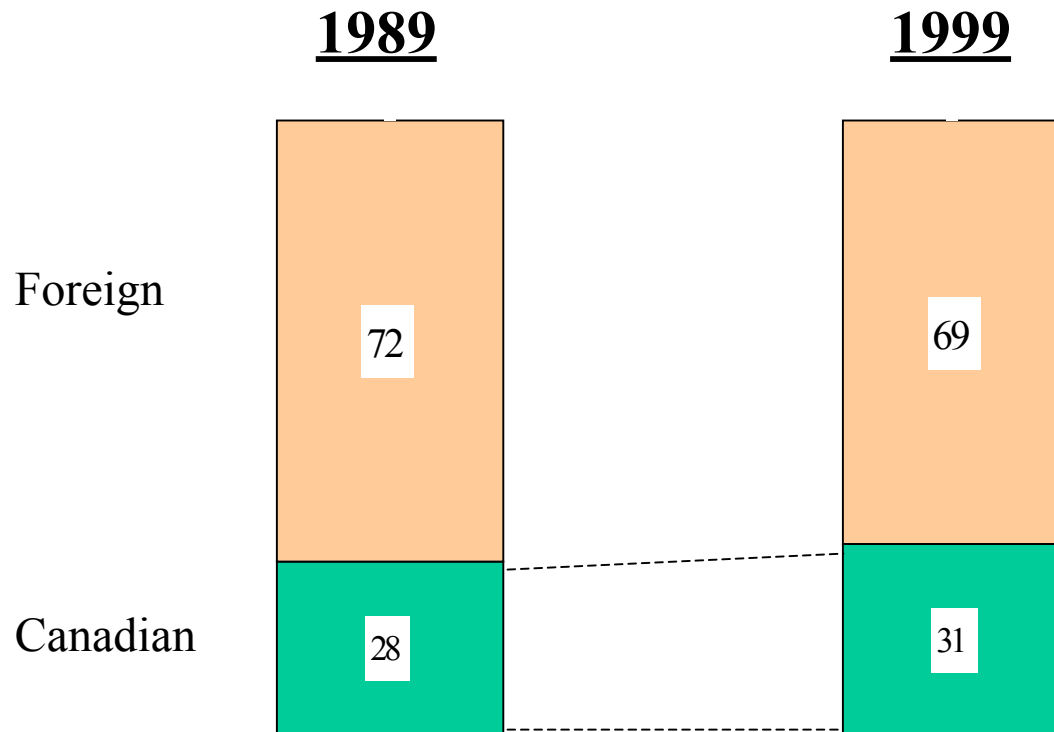


Source: CMRI (Statistics Canada)

- Likewise, the audience share of *Canadian* versus *Foreign* programs has not changed a great deal in the past decade
- Canadian programs have increased their share slightly since 1989, and now account for about one-third of TV viewing

Audience Share of Canadian and Foreign Programs On English-language Television

%



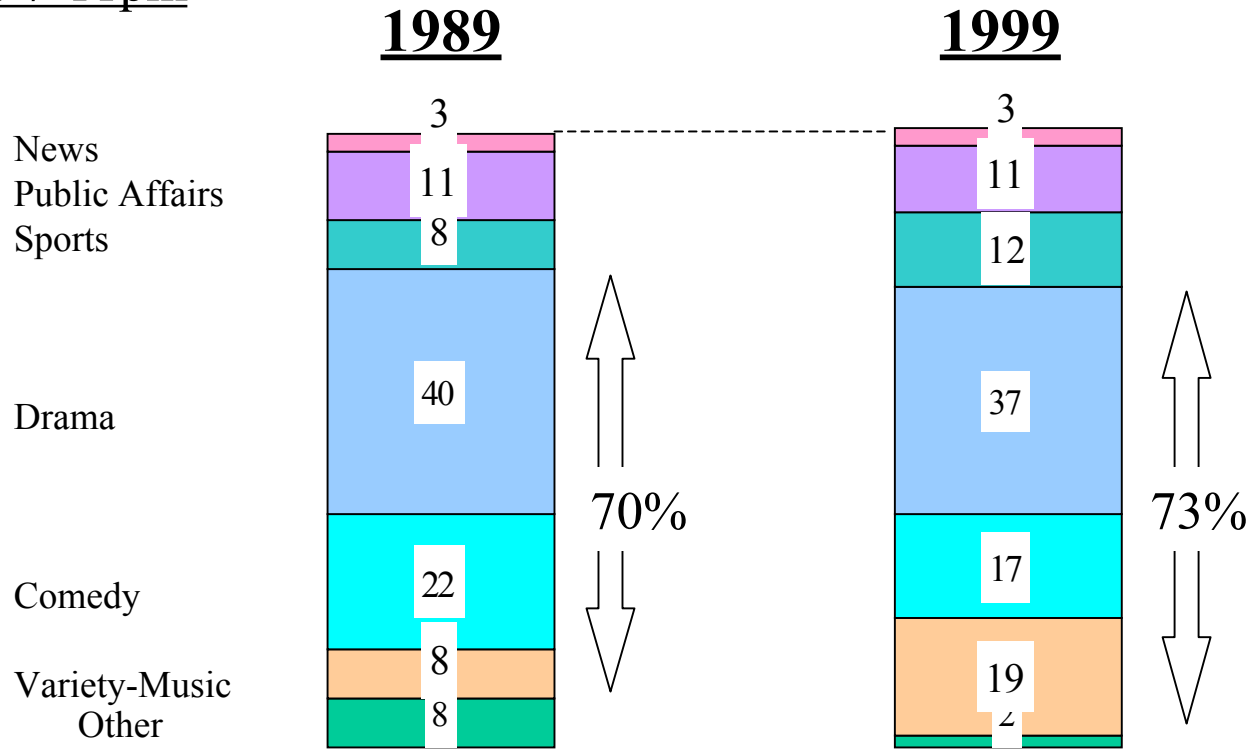
Source: CMRI (Statistics Canada)

- In prime time, 7-11pm, almost three-quarters of viewing is devoted to entertainment programming
- Canadian programs account for even less of the audience in prime time ...

Audience Share of Different Types of Programs On English-language Television

%

Prime time 7-11pm



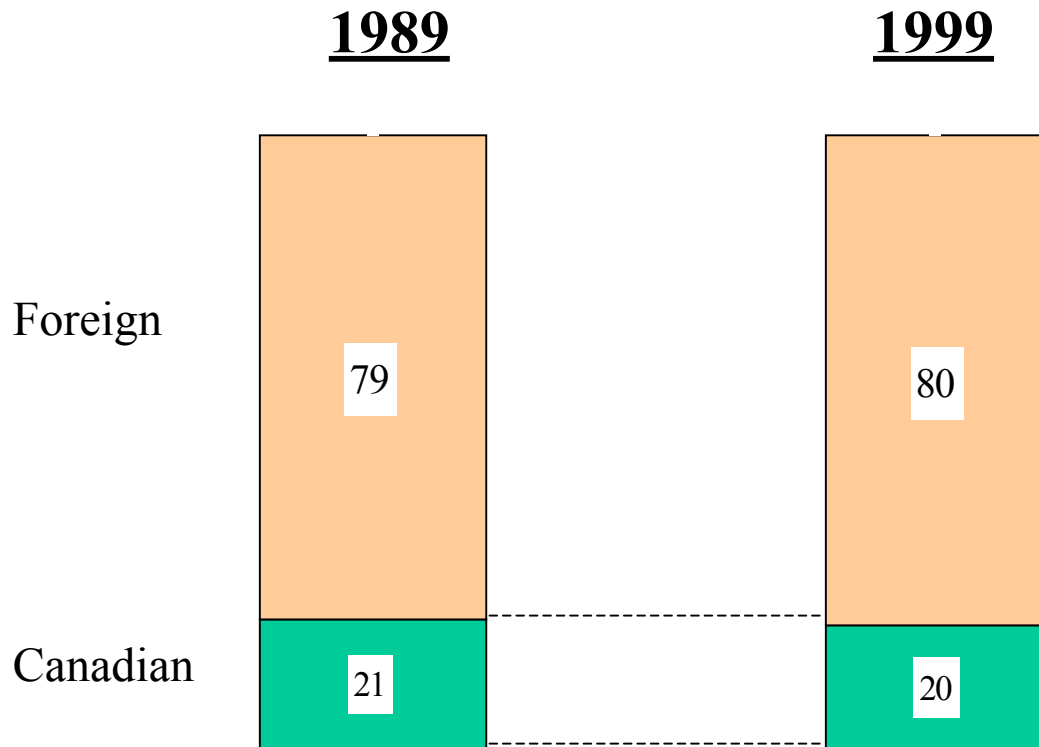
Source: CMRI (Statistics Canada)

- In prime viewing hours, 7 - 11 pm, the share of viewing to Canadian programs has remained at about 20% over the past decade
- This means that when Canadians turn to TV for drama and other forms of entertainment, they choose mostly foreign (US) programs

Audience Share of Canadian and Foreign Programs On English-language Television

%

Prime time 7-11pm



Source: CMRI (Statistics Canada)

Viewing to Prime Time Entertainment Programming

- foreign *Drama* out-rates Canadian drama by 10 to 1
- the situation in *Comedy* programming is even more skewed, with fully 96% of viewing time devoted to foreign programs

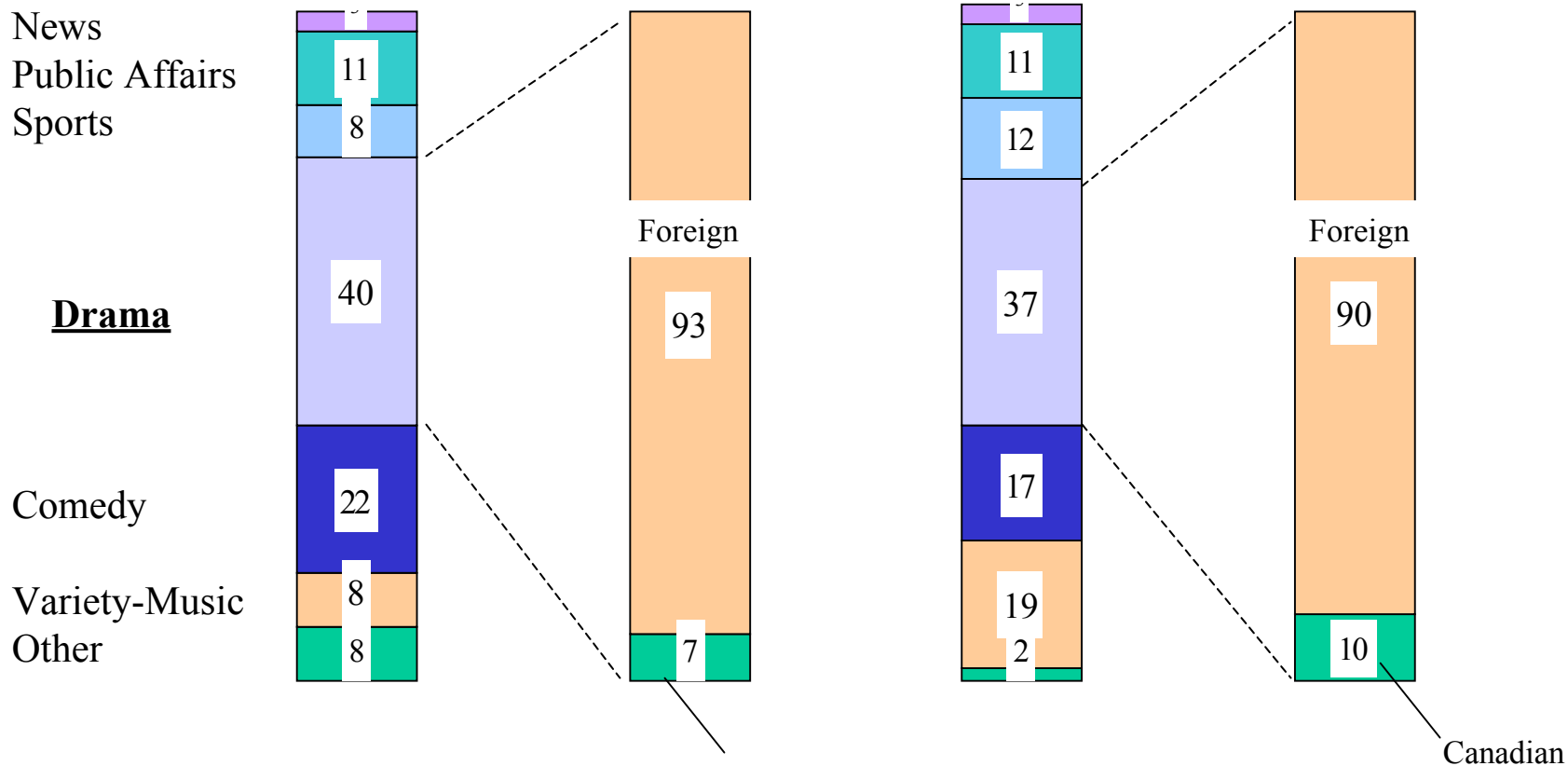
English TV: Drama

Percentage of Viewing Time Devoted to Canadian Drama Programming

Prime time 7-11pm

1989

1999



Source: CMRI (Statistics Canada)

Canadian

Canadian

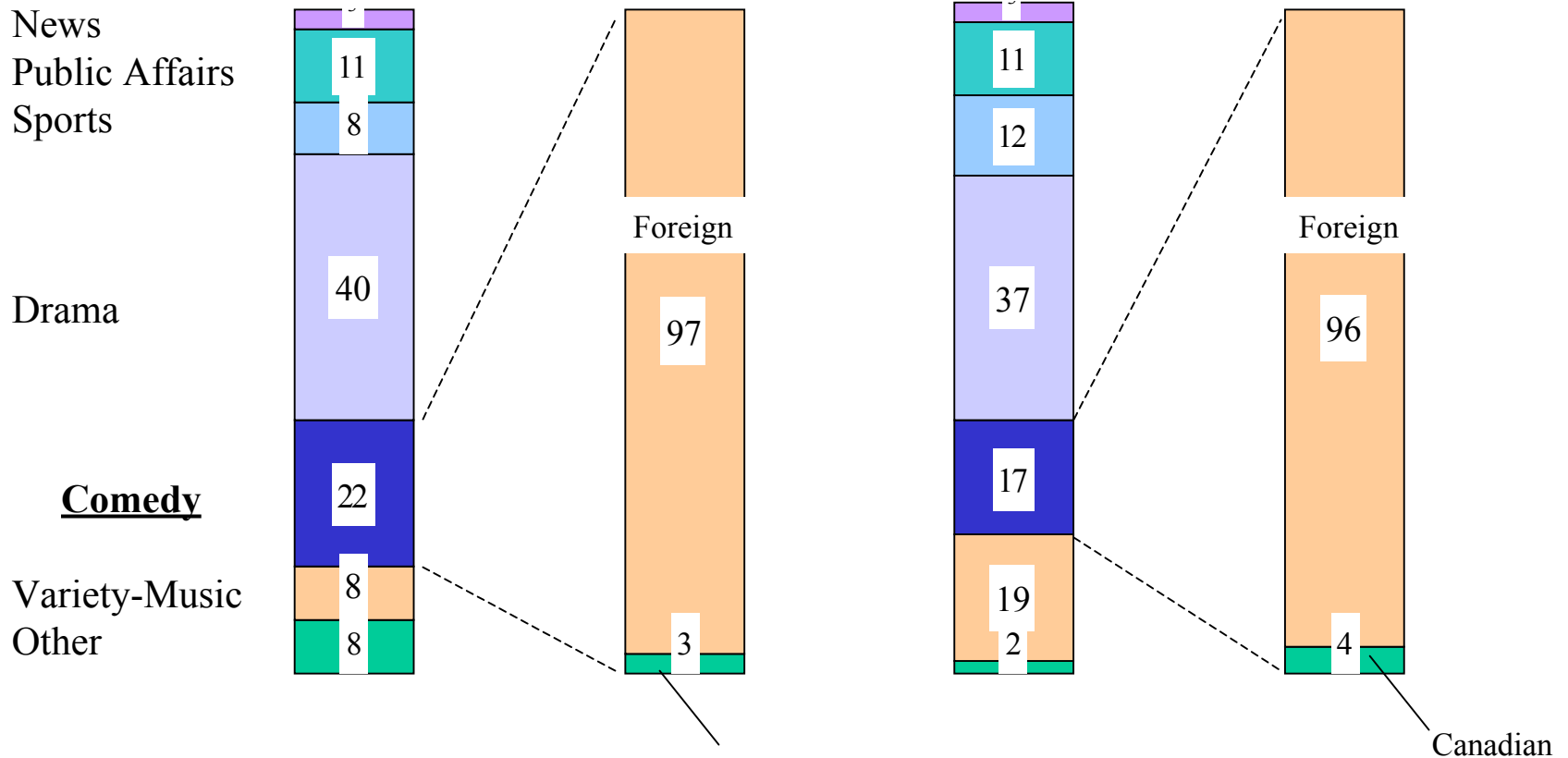
English TV: Comedy

Percentage of Viewing Time Devoted to Canadian Comedy Programming

Prime time 7-11pm

1989

1999



Source: CMRI (Statistics Canada)

Canadian

Canadian Content: Viewing Share and Availability

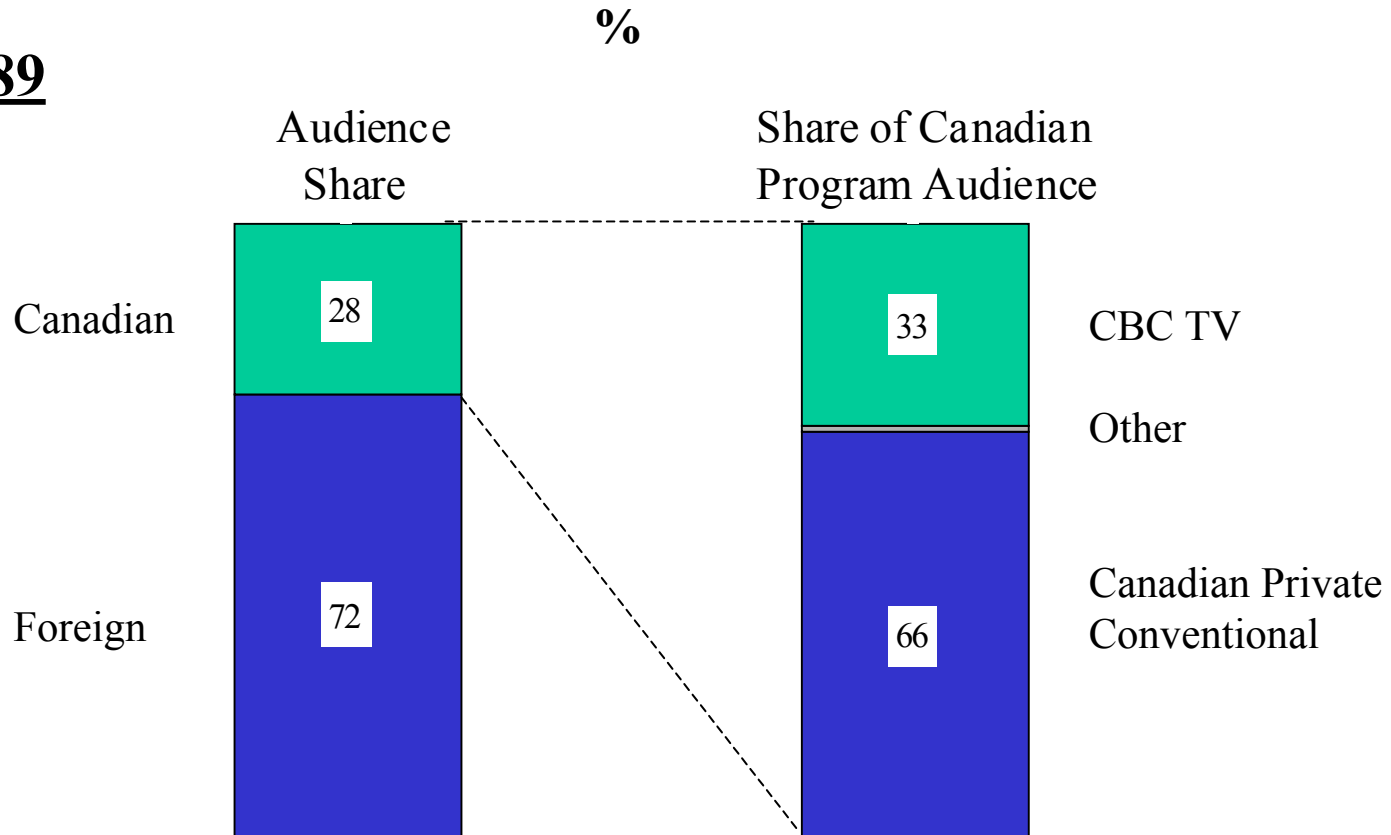
Assessment by Program Genre

Who Gets What Share of the Audience to Canadian Programs?

- In 1989 Canadian private TV stations captured about 2/3 of the audience to Canadian programs and the CBC accounted for the rest
- Ten years later almost 1/3 of the audience to Canadian programs is captured by Canadian pay and specialty services--with a resulting decline in viewing to private TV (47%) and to the CBC (23%)

Audience Share of Canadian and Foreign Programming On English-language Television

1989

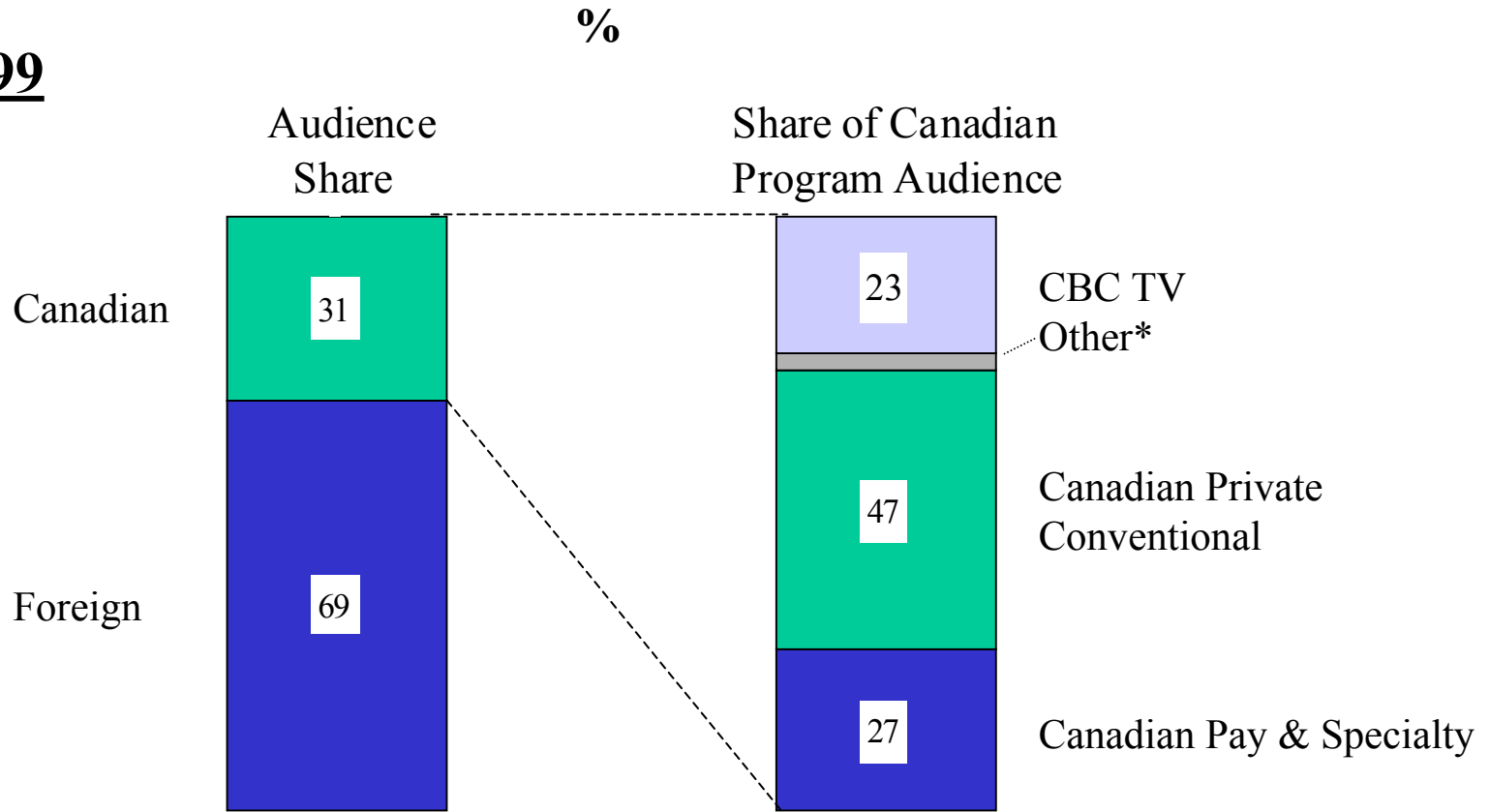


Source: CMRI (Statistics Canada)

Notes: CBC includes private affiliates in non-CBC time

Audience Share of Canadian and Foreign Programming On English-language Television

1999



Source: CMRI (Statistics Canada)

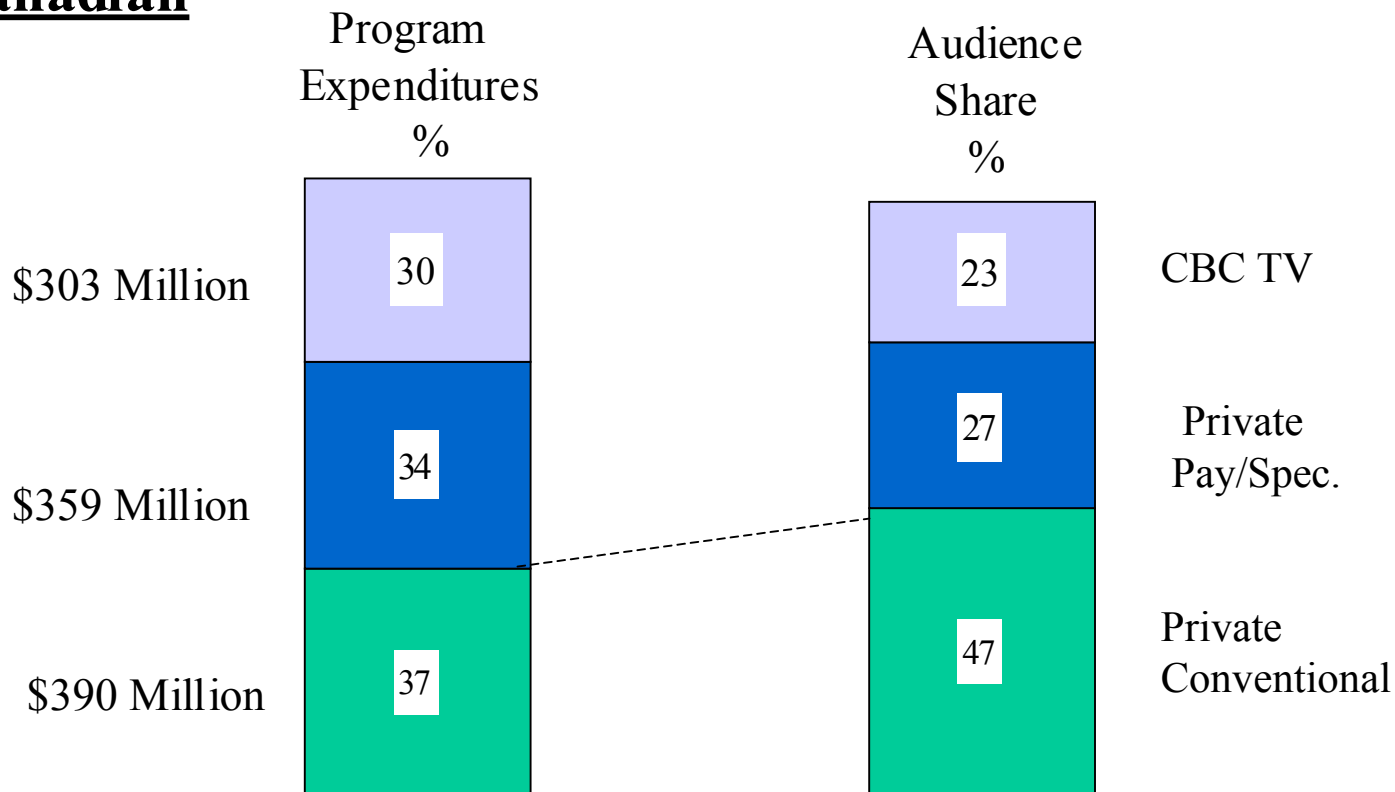
Notes: CBC includes private affiliates in non-CBC time ; Newsworld included in Pay and Specialty

* Includes Cdn educational, PBS, etc

- A review of available financial data indicates that Canadian private TV stations are more ‘efficient’ than the CBC or Canadian pay and specialty channels in attracting audiences to their Canadian programs
- That is, conventional private TV stations attract a larger share of the audience per dollar spent on Canadian programming

Canadian Programming Expenditures and Relative Audience Share of English-language TV Stations 1999-2000

Canadian



Sources: CBC data based on April 1st fiscal filed at 1999 CBC licence renewal; Private conventional data from CRTC published report 1999-2000; Pay and specialty from CRTC published report 1999-2000; viewing data are BBM Fall 1999. Notes: CBC is assumed to spend 95% of its program expenditures on Canadian programs; Pay/Specialty includes Meteomedia/Teletoon and Newsworld; Private English conventional TV is assumed to be 75% of CRTC total Canadian program expenditure; missing share points are provincial broadcasters.

Canadian Drama Programming:

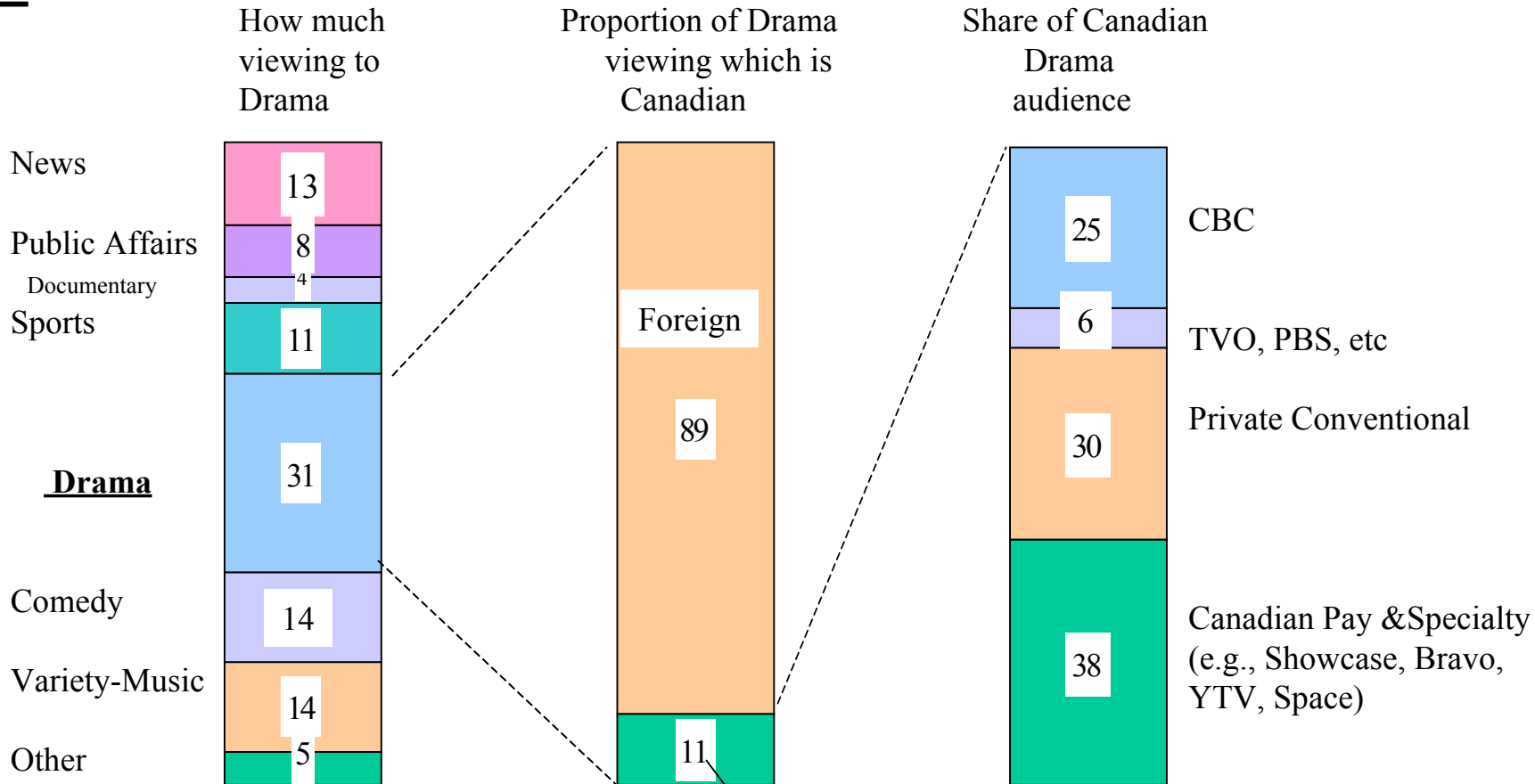
- Canadian pay & specialty channels play a major role in Canadian *Drama*, accounting for **38%** of the audience to this important genre
- Canadian private conventional broadcasters, have a 30% audience share for Canadian drama programs

English TV: Drama

Percentage of Viewing Time Devoted to Drama

1999

Programming on the Different Networks:



Source: CMRI (Statistics Canada)

Note: CBC includes private affiliates in non-CBC time

English TV: Drama

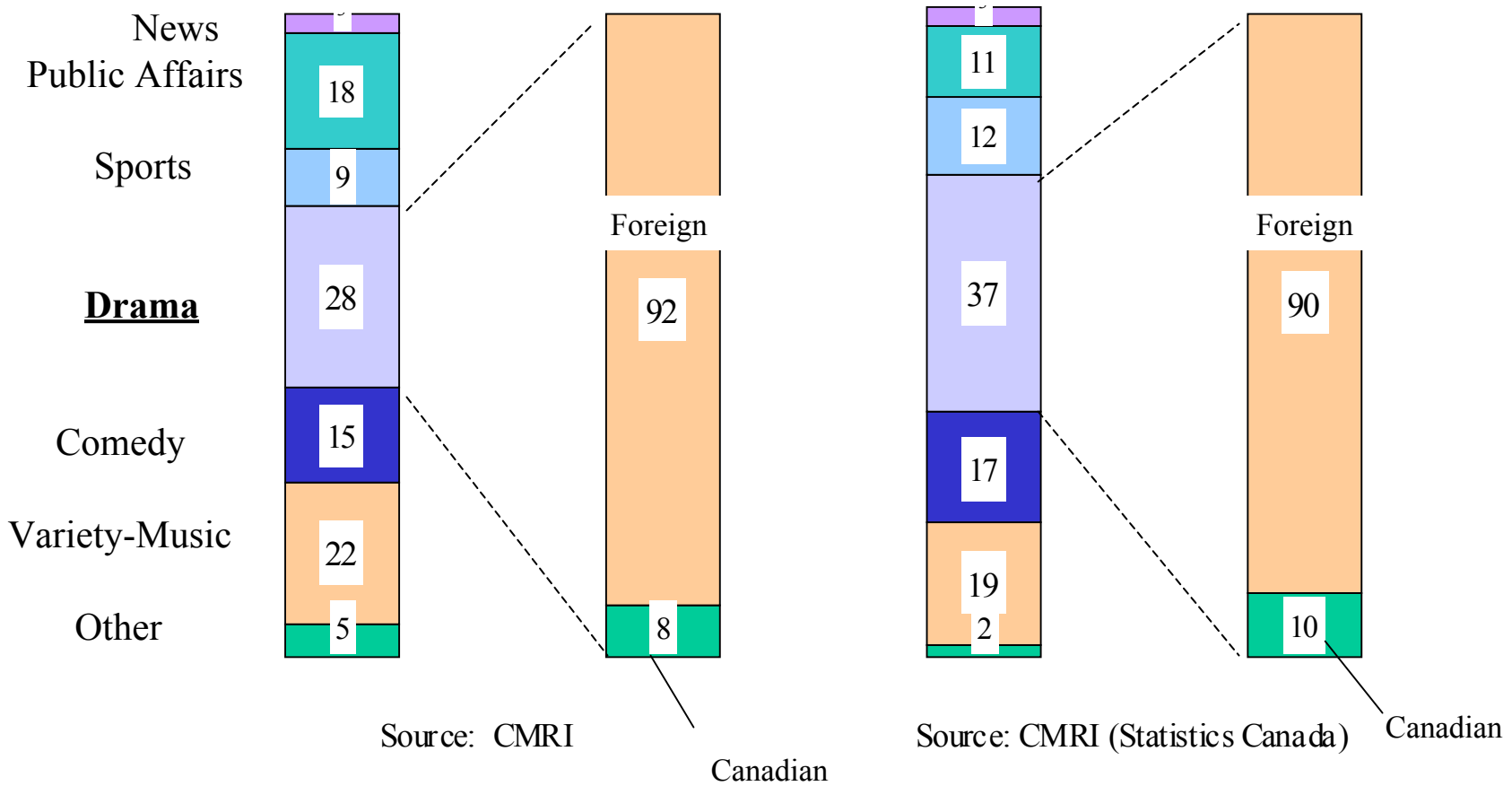
Estimate of the Percentage of Programming and Viewing Time That is Canadian in Origin, 1999

Prime time 7-11pm

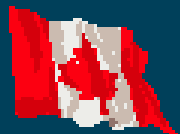
%

Program Hours

Viewing Time



- According to TVB, an industry association that markets and promotes *Canadian* TV stations:
 - the Top 10 drama series are typically all American
 - only 2 of the Top 10 specials are typically Canadian, including the Grey Cup

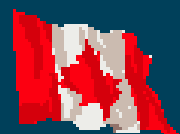


Top 10 Regularly Scheduled Network Programs in Canada

Rank	Network	Program	No. of Stns	A 18+ (000)
1.		ER	26	2,706
2.		Who Wants to be(Thur)	23	2,586
3.		Who Wants to be (Tue)	23	2,553
4.		Who Wants to be (Sun)	23	2,502
5.		Friends*	21	2,477
6.		Wheel of Fortune	21	1,937
7.		Frasier*	21	1,849
8.		Jeopardy	20	1,775
9.		Ally McBeal	26	1,756
10.		Jesse*	20	1,511

Source: Fall 99/Spring 2000 BBM Sweep Average.

* All Global Owned & Operated stations as well as all other stations sublicensed to carry the specific Global programming



Top 10 Specials in Canada

Rank	Network	Program	No. of Telecasts (000)	A 18+ (000)
1.		Survivor Season Finale*	1	5,338
2.		Academy Awards	1	4,791
3.		Superbowl *	1	3,678
4.		Academy Pre-Show	1	3,310
5.		Golden Globe Awards	1	2,766
6.		Grammy Awards	1	2,598
7.		Grey Cup Game '99	1	2,190
8.		Emmy Awards	1	1,965
9.		Anne...Green Gables 3	2	1,862
10.		Amer. Music Awards	1	1,831

Source: Nielsen Media Research Fall 99/Spring 2000

- By comparison to the many US drama series that achieve more than 1 million Canadian viewers, in a typical TV season only one Canadian Drama/Comedy series is likely to attract as many viewers
- In part this is attributable to the fact that Canadian private conventional TV stations continue to make significant use of simulcasting opportunities with their US network programs

Top 20 Canadian Drama/Comedy Series in 1999-2000

RANK	PROGRAM	Average Audience (000)
1	RCAF	1093
2	This Hour Has 22 Minutes	914
3	Da Vinci's Inquest	793
4	Red Green Show	683
5	Cold Squad	597
6	Made In Canada	568
7	RCAF (r)	540
8	On the Road Again	503
9	Wind At My Back	475
10	Nothing to Good for a Cowboy	455
11	The City (Fri)	435
12	Power Play	412
13	The City (Thu)	336
14	This Hour Has 22 Minutes (r)	314
15	Just for Laughs	313
16	Red Green Show (r)	261
17	Country Canada	243
18	CBC Thursday	225
19	Comics	210
20	Pit Pony	202

Audiences to Documentary Programs

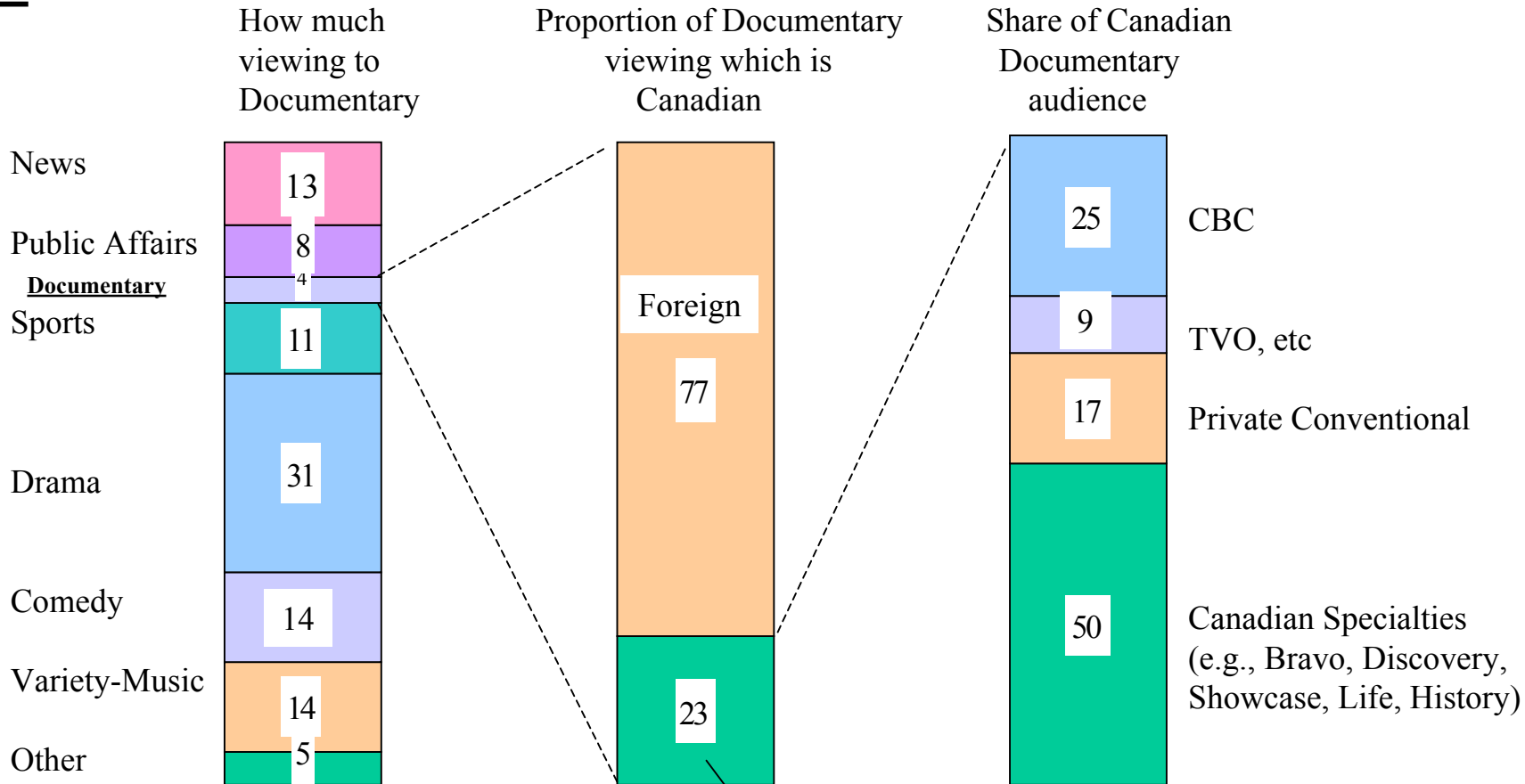
- Canadian specialty services offer new opportunities for Canadian documentary programming, and now provide more than **50%** of the audience for this genre of programming
- Canadians developed the documentary genre and are recognized throughout the world for their skill in this type of programming. Yet in 1999, foreign-produced *Documentary* programming accounted for more than 3/4 of the viewing hours

English TV: Documentary

Percentage of Viewing Time Devoted to Documentary

1999

Programming on the Different Networks:



Source: CMRI (Statistics Canada)

Note: CBC includes private affiliates in non-CBC time ; Newsworld included in Pay and Specialty

Variety-Music Programming

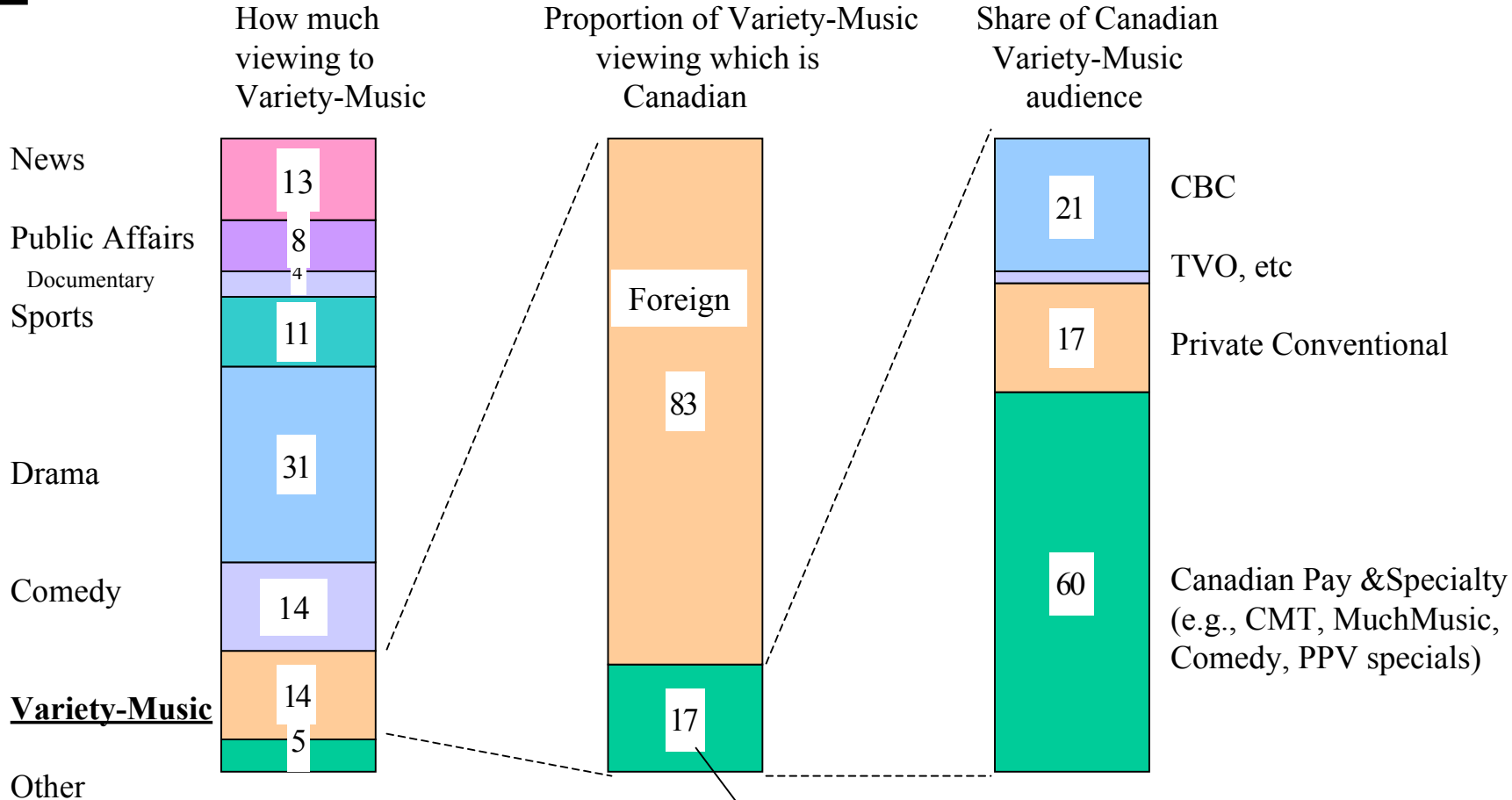
- Canadian specialty channels play a pre-eminent role when it comes to Canadian *Variety-Music*, accounting for some **60%** of the audience

English TV: Variety-Music

Percentage of Viewing Time Devoted to Variety-Music

1999

Programming on the Different Networks:



Source: CMRI (Statistics Canada)

Note: CBC includes private affiliates in non-CBC time

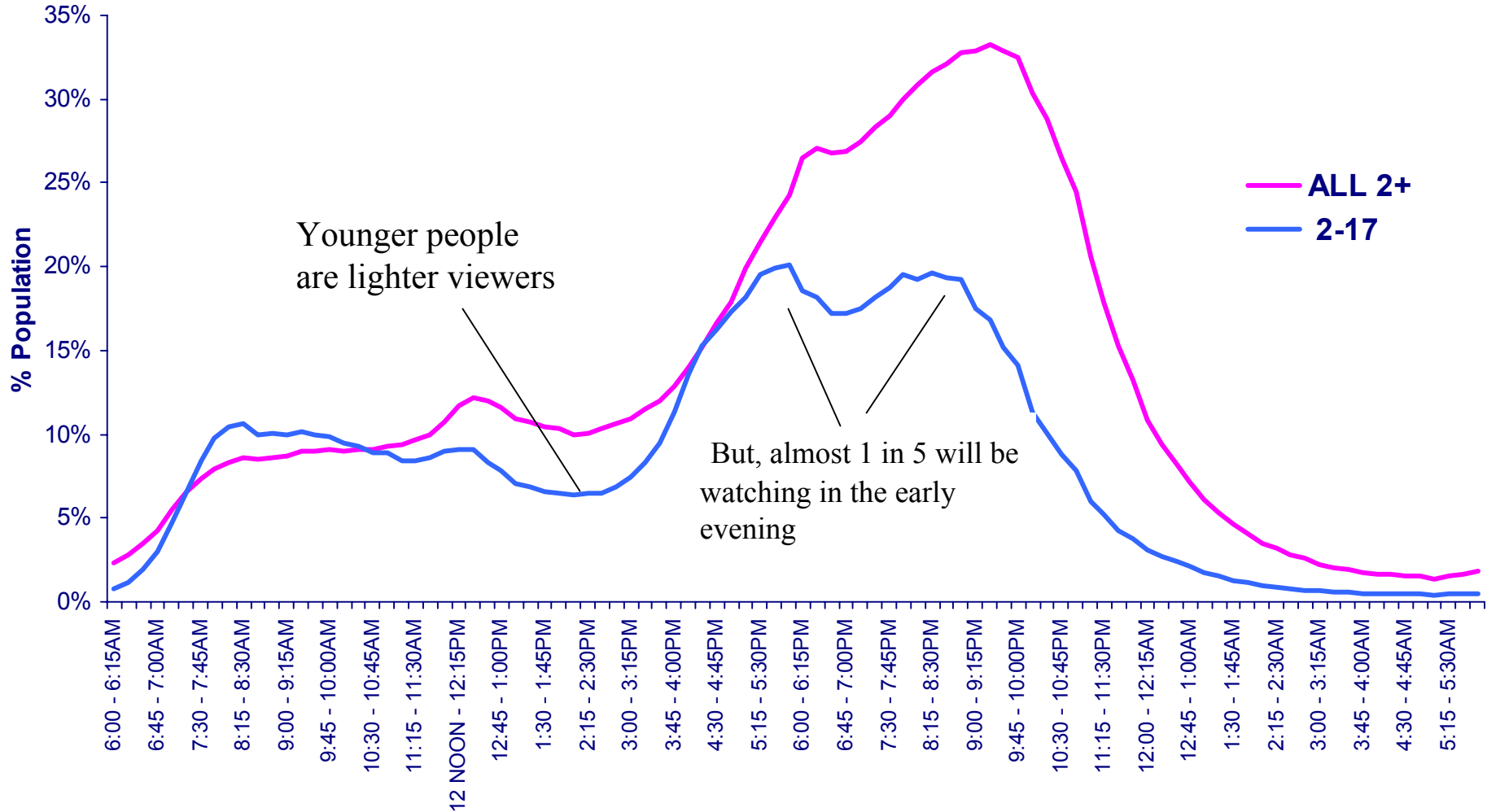
Canadian

Children's TV

- Children watch less TV than adults but TV is very important to them
- Young children (2-11) spend more time watching Canadian entertainment programs than any other age group -- *three times* the average

Hourly Viewing Curve of All Television Stations Average Day in 2000

Children 2-17 Compared to All Persons 2-plus



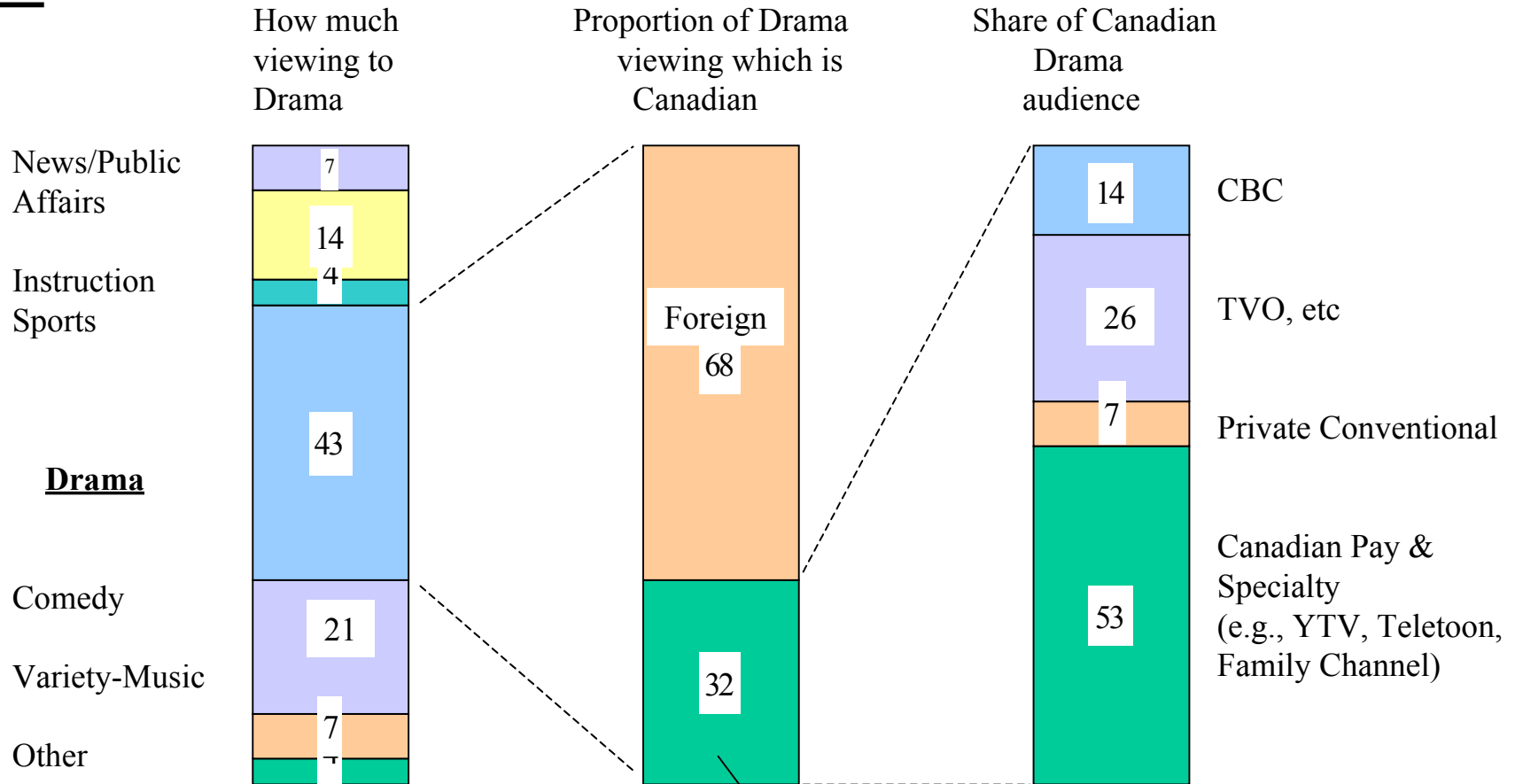
- Canadian pay and specialty channels account for the majority of this Canadian success story, with a better than **50%** audience share
- TVOntario makes a significant contribution to the viewing by children (2 - 11) of Canadian drama programs

English TV: Drama

Percentage of Viewing Time Devoted to Drama

1999

Programming on the Different Networks:



Source: CMRI (Statistics Canada)

Note: CBC includes private affiliates in non-CBC time