STUFF WE WATCH

UNDERSTANDING CANADIAN VIDEO CONSUMPTION HABITS
There isn’t a week that goes by where we aren’t chatting about the latest TV show that we watched with our family, our friends, or our colleagues. Video surrounds us – whether we sit down to binge the latest series that Netflix has dropped or we casually watch a video clip on our phones – we can’t get away.

We wanted to understand the complexities of Canadians video habits and the evolution of these habits over 2020. With so much content available at our fingertips, we wanted to determine where and what video content Canadians watch. We have seen audiences proliferate as more video content platforms launch in Canada. However, this doesn’t necessarily mean that we are walking away from tried & true platforms like traditional TV. Canadians spend just as much time with live TV as we do with streaming subscription platforms.

By using a single source panel to tell us how viewing happens at a respondent level, this allows us to gain a full picture of video viewing across platforms and content. We also wanted to challenge our own industry in how we think and talk about video platforms. These platforms give us what we want to watch but Canadians don’t actually know how they watch video.
WE WATCH WHAT?

OTT IS DOMINATED BY NETFLIX
Among OTT platforms, Netflix remains king as the streaming subscription service with the highest awareness and per capita usage. Still – just over half of Canadians have access to Netflix, followed by Amazon Prime Video and Disney+. 

TRADITIONAL CABLE IS ALIVE & WELLL
Over two-thirds of Canadians still have access to traditional cable.

While viewing has declined, live TV viewing is equivalent to that of OTT viewing.

Two-thirds of TV subscribers don’t plan on cutting the cord.

WE EXPECT TO MAINTAIN BUDGETS
If Netflix were to increase the cost of their service by $2, more than half of current Netflix users would be fine with the change. We expect to maintain our current entertainment budgets – not necessarily adding any new services or cutting any subscriptions. Very few Canadians mentioned making a change to their current subscriptions.
2/3 of Canadians subscribe to online video, subscription/streaming video services, and cable TV.

Q1 and Q2 percentages for various services:
- **Cable TV**: 70% in Q1, 68% in Q2
- **Subscription/Streaming Video Services**: 64% in Q1, 60% in Q2
- **Online Video**: 63% in Q1, 62% in Q2
- **Online TV**: 24% in Q1, 23% in Q2
- **Pirated Video/TV Programming**: 10% in Q1, 10% in Q2

*“Do you currently subscribe or access any of the following services?”*
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
Based on online TV viewers
What percentage of video do you consume across the below channels in a given week?

Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020

**LIVE TV AND STREAMING ARE OUR TOP 2 VIDEO SOURCES**

<table>
<thead>
<tr>
<th>Channel</th>
<th>Q1</th>
<th>Q2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live TV</td>
<td>25%</td>
<td>24%</td>
</tr>
<tr>
<td>Recorded TV</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>VOD</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Streaming Video</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>Online TV</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Pirated Video</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>Online Video</td>
<td>16%</td>
<td>15%</td>
</tr>
</tbody>
</table>

“Percentage of video do you consume across the below channels in a given week?”

Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
Q: Do you know what video on-demand is through your cable TV?
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020

2/3 OF CANADIANS KNOW WHAT VIDEO-ON-DEMAND IS THROUGH THEIR CABLE TV PROVIDER
OF CURRENT CABLE SUBSCRIBERS HAVE NO CURRENT PLANS ON CUTTING THE CORD

"Could you see yourself cancelling your cable completely and only viewing via apps and subscription services?"
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
Canadians are looking for movies and to watch True Crime/Documentaries.
In the past month, have you binged watched a TV program? This is considered watching 3 or more episodes of a single program in one sitting.

Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
TOP SHOWS BINGED

#1
OZARK

#2
MODERN FAMILY

#3
GREY’S ANATOMY

#4
FRIENDS

#5
THE OFFICE

"Where did you watch this TV program and what program was it?"
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
CANADIANS LIKE GETTING RECOMMENDATIONS FROM FRIENDS AND FAMILY WHEN FINDING NEW SHOWS

Q: How do you pick your next show to watch?
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020

- Getting a recommendation from friends and family: 49%
- Saw an ad/Promotion on TV for a new TV show: 40%
- I heard a lot of positive buzz and wanted to check it out: 29%
- Promoted on the main page of a streaming platform: 23%
- Had an actor/actress that I wanted to watch: 22%
HALF OF CANADIANS WATCH BETWEEN 2-5 SHOWS A WEEK

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2-5 SHOWS A WEEK</td>
<td>56%</td>
</tr>
<tr>
<td>6-10 SHOWS A WEEK</td>
<td>21%</td>
</tr>
<tr>
<td>1 SHOW A WEEK</td>
<td>12%</td>
</tr>
<tr>
<td>11 OR MORE SHOWS A WEEK</td>
<td>12%</td>
</tr>
</tbody>
</table>

“Do you currently subscribe or access any of these services?”
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
SECTION 1

SUBSCRIPTION STREAMING SERVICES
THERE IS A SMALL INCREASE IN THE AMOUNT OF PEOPLE WHO HAVE SUBSCRIPTION SERVICES

Q: Do you access or subscribe to a streaming video services (i.e. Netflix, Crave)?

Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020

- 70% English Canadians
- 51% French Canadians
CANADIAN SUBSCRIPTIONS ARE BEHIND GLOBAL PLATFORMS

<table>
<thead>
<tr>
<th>Platform</th>
<th>% of Canadians aware of the platform</th>
</tr>
</thead>
<tbody>
<tr>
<td>NETFLIX</td>
<td>99%</td>
</tr>
<tr>
<td>AMAZON PRIME VIDEO</td>
<td>95%</td>
</tr>
<tr>
<td>DISNEY+</td>
<td>94%</td>
</tr>
<tr>
<td>CRAVE</td>
<td>89%</td>
</tr>
<tr>
<td>YOUTUBE PREMIUM</td>
<td>89%</td>
</tr>
<tr>
<td>APPLE TV+</td>
<td>87%</td>
</tr>
<tr>
<td>GLOBALTV</td>
<td>77%</td>
</tr>
<tr>
<td>CBS ALL ACCESS</td>
<td>63%</td>
</tr>
<tr>
<td>SPORTSNET NOW</td>
<td>59%</td>
</tr>
<tr>
<td>TSN DIRECT</td>
<td>57%</td>
</tr>
<tr>
<td>CBC GEM</td>
<td>57%</td>
</tr>
<tr>
<td>HAYU</td>
<td>57%</td>
</tr>
<tr>
<td>CLUB ILLICO</td>
<td>46%</td>
</tr>
<tr>
<td>84% AMONG FRENCH CANADIANS*</td>
<td>45%</td>
</tr>
<tr>
<td>STACKTV</td>
<td>45%</td>
</tr>
<tr>
<td>DAZN</td>
<td>42%</td>
</tr>
</tbody>
</table>

“What video subscription does your household pay for and which ones do you have access to but someone else pays for?”

[Based on total Canadians]

Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
OF NETFLIX USERS PAY FOR ACCESS

2/3

“What video subscription does your household pay for and which ones do you have access to but someone else pays for?”

[Based on Netflix users]

Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
AVERAGE NUMBER OF STREAMING SUBSCRIPTION SERVICES A HOUSEHOLD HAS

1.9

“What video subscription does your household pay for and which ones do you have access to but someone else pays for?”
[Based on total Canadians]
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
<table>
<thead>
<tr>
<th>Platform</th>
<th>% of Canadians who access the platform</th>
</tr>
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<tr>
<td>NETFLIX</td>
<td>52%</td>
</tr>
<tr>
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<tr>
<td>DISNEY+</td>
<td>17%</td>
</tr>
<tr>
<td>CRAVE</td>
<td>13%</td>
</tr>
<tr>
<td>APPLE TV+</td>
<td>8%</td>
</tr>
<tr>
<td>YOUTUBE PREMIUM</td>
<td>8%</td>
</tr>
<tr>
<td>SPORTSNET NOW</td>
<td>5%</td>
</tr>
<tr>
<td>CBS ALL ACCESS</td>
<td>4%</td>
</tr>
<tr>
<td>TSN DIRECT</td>
<td>4%</td>
</tr>
<tr>
<td>CBC GEM</td>
<td>4%</td>
</tr>
<tr>
<td>DAZN</td>
<td>4%</td>
</tr>
<tr>
<td>CLUB ILLICO</td>
<td>4%</td>
</tr>
<tr>
<td>STACKTV</td>
<td>3%</td>
</tr>
<tr>
<td>HAYU</td>
<td>2%</td>
</tr>
</tbody>
</table>

*What video subscription does your household pay for and which ones do you have access to but someone else pays for?*

Source: Mindshare's Stuff We Watch Proprietary Study, Q1 2020

"9% among French Canadians*"
<table>
<thead>
<tr>
<th>Platform</th>
<th>% of Canadians who access the platform</th>
</tr>
</thead>
<tbody>
<tr>
<td>NETFLIX</td>
<td>54%</td>
</tr>
<tr>
<td>AMAZON PRIME VIDEO</td>
<td>30%</td>
</tr>
<tr>
<td>DISNEY+</td>
<td>19%</td>
</tr>
<tr>
<td>GLOBAL TV</td>
<td>13%</td>
</tr>
<tr>
<td>CRAVE</td>
<td>12%</td>
</tr>
<tr>
<td>YOUTUBE PREMIUM</td>
<td>11%</td>
</tr>
<tr>
<td>APPLE TV+</td>
<td>10%</td>
</tr>
<tr>
<td>SPORTSNET NOW</td>
<td>7%</td>
</tr>
<tr>
<td>TSN DIRECT</td>
<td>7%</td>
</tr>
<tr>
<td>CBC GEM</td>
<td>7%</td>
</tr>
<tr>
<td>DAZN</td>
<td>7%</td>
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<tr>
<td>CBS ALL ACCESS</td>
<td>6%</td>
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<td>6%</td>
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<td>HAYU</td>
<td>3%</td>
</tr>
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<td>12% AMONG FRENCH CANADIANS*</td>
<td></td>
</tr>
</tbody>
</table>

“What video subscription does your household pay for and which ones do you have access to but someone else pays for?”

[Based on total Canadians]

Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
What video subscription does your household pay for and which ones do you have access to but someone else pays for?*

[Based on capita]

Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
CANADIANS ARE AWARE OF PLATFORMS BUT DON’T ACCESS AT HOME

CRAVE
- Aware: 89%
- Use: 12%

APPLE TV+
- Aware: 87%
- Use: 10%

CLUB ILLICO*
- Aware: 84%
- Use: 12%

*What video subscription does your household pay for and which ones do you have access to but someone else pays for?*

[Based on capital] *Club Illico is based on French Canadians only.
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
In Q2 we were looking to add platforms with our favorite videos.

- **Disney+** 20%
- **Prime Video** 19%
- **Craave** 13%
- **YT Premium** 11%
- **DAZN** 9%
- **Apple TV+** 9%

In Q2 subscribers went back to adding mainstream subscription platforms to their suite of services.

Disney+ saw a large jump in Q2, Canadians want platforms with all their favourite films and TV shows.

*“Are there any video subscription services that you are planning or thinking of adding in the coming year?” [Based on total OTT users]*  
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
“Have you heard of any of the following services?”

Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020

HULU IS THE MOST COMMON STREAMING SERVICE, BUT HBO MAX AND QUIBI ARE ON THE RISE IN Q2
CITYTV IS USED WEEKLY BY 45% OF CANADIANS AND GLOBAL TV AND CTV HAVE JUST OVER 30% OF CANADIANS USING THEM WEEKLY.
SECTION 2

TRADITIONAL TV VIEWING
CANADIANS ARE STILL ON CABLE

66% 67%

CABLE

27% 27%

FIBRE

10% 10%

SATELITTE

3% 2%

OFF-AIR

*You mentioned that you have access to cable TV. How do you access this?*
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
10.2M

CANADIAN HOUSEHOLDS ACCESS CABLE

“Do you currently subscribe or access any of these services?”
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
OF CANADIANS HAVE A PVR

“Do you have a PVR or other recording device of live television?”
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
IN Q2 THERE WAS SLIGHT DECREASE THE AMOUNT OF CANADIANS WHO WATCHED VIDEO ON DEMAND IN THE PAST MONTH

Q: How frequently do you watch video on-demand?
Source: Mindshare's Stuff We Watch Proprietary Study, Q2 2020
LIVE TV AND SUBSCRIPTION SERVICES HAVE OUR UNDIVIDED ATTENTION

Q: For the TV programs that receive you undivided attention, what platform do you watch them on?

Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
**LIVE TV IS USED AS BACKGROUND NOISE**

Q: What platforms do you typically watch that TV program while you are doing something else?

Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020

| Platform                        | Percentage
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Live TV</td>
<td>69%</td>
</tr>
<tr>
<td>Subscription/Streaming Video Services</td>
<td>28%</td>
</tr>
<tr>
<td>Recorded TV</td>
<td>19%</td>
</tr>
<tr>
<td>Video On-Demand Through Cable TV</td>
<td>15%</td>
</tr>
<tr>
<td>Online TV</td>
<td>15%</td>
</tr>
<tr>
<td>Pirated Video/TV Programming</td>
<td>9%</td>
</tr>
<tr>
<td>Online Video</td>
<td>17%</td>
</tr>
</tbody>
</table>
THE NEWS HAS CANADIANS UNDIVIDED ATTENTION, FOLLOWED BY TRUE CRIME/DOCUMENTARIES AND SCRIPTED DRAMAS.

Q: What type of programs have your undivided attention when you watch?
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
OVER 1/3 OF CANADIANS PUT ON THE NEWS AS BACKGROUND, AND ALMOST 1/3 OF CANADIANS CLAIM THAT THEY DON’T PUT SHOWS ON IN THE BACKGROUND.

Q: What type of shows do you have on in the background while you're doing something else?

Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
SECTION 3
ENTERTAINMENT BUDGET MANAGEMENT
IN Q1, WE SPENT 4X MORE ON CABLE

<table>
<thead>
<tr>
<th>Service</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>CABLE TV</td>
<td>$75.80</td>
</tr>
<tr>
<td>NETFLIX</td>
<td>$15.99</td>
</tr>
<tr>
<td>AMAZON PRIME VIDEO</td>
<td>$14.50</td>
</tr>
<tr>
<td>CRAVE</td>
<td>$14.08</td>
</tr>
<tr>
<td>DISNEY+</td>
<td>$11.73</td>
</tr>
</tbody>
</table>

“What do you pay in an average month in TV and Streaming?”
Source: Mindshare’s Stuff We Watch Proprietary Study, Q1 2020
In Q2, we saw a rise in price for most services.

<table>
<thead>
<tr>
<th>Service</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cable TV</td>
<td>$73.32</td>
</tr>
<tr>
<td>Crave</td>
<td>$18.59</td>
</tr>
<tr>
<td>Amazon Prime</td>
<td>$16.19</td>
</tr>
<tr>
<td>Disney+</td>
<td>$16.21</td>
</tr>
<tr>
<td>Netflix</td>
<td>$15.99</td>
</tr>
</tbody>
</table>

“What do you pay in an average month in TV and Streaming?”
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
WOULD PAY AN ADDITIONAL $2 A MONTH

more than half of Netflix Subscribers

"If Netflix increased prices tomorrow by $2, would you remain a subscriber?"
[based on Netflix users]
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
1 in 3 Canadians expect their total home video entertainment budget to increase in the next 12 months.

Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
WE AREN’T FAMILIAR WITH THE PLATFORMS THAT WE USE IN OUR HOMES

14% CHROMECAST
14%

11% APPLE TV
10%

10% ROKU
10%

9% AMAZON FIRE STICK
8%

7%

“Do you use any of these platforms to access video in your household?”
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
19% OF CANADIAN’S USE BELL FIBE

Q: Which of the following services from these providers do you use?
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
Based on consumers who have cable
2/3 OF CANADIANS HAVE HIGH SPEED INTERNET.

I don't have broadband Internet at home

Q: What speed of broadband do you have at home?
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
40% of Canadians find that sometimes TV ads are relevant to them.

Q: Do you find advertising on TV relevant to you?
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020

- Always: Q2 6% Q1 6%
- Sometimes: Q2 40% Q1 41%
- Rarely: Q2 35% Q1 35%
- I do everything I can to skip ads: Q2 19% Q1 18%
3/4 OF CANADIANS SAY THEY RECEIVE TOO MANY ADS

“Do you feel you get”
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
CANADIANS SEE THE SAME ADS ALL THE TIME

43% I SEE THE SAME ADS ALL THE TIME

36% A GOOD MIX

17% A LOT OF DIFFERENT ADVERTISERS

3% I HAVE NEVER SEEN THE SAME AD

“Do you feel you see”
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
1/3 of Canadians say that they like video ads the least out of all types of ads.

Q: Do you like video ads?
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
Appendix
CANADIANS ARE LOOKING FOR MOVIES AND TO WATCH TRUE CRIME/DOCUMENTARIES

Q: What type of content are you looking to pay for in a video service?
BELL AND VIDEOTRON HOLD THE TOP 2 SPOTS FOR CABLE SUBSCRIBERS

“What service provider do you use to access?”
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020
2/3 of Canadians have a PVR.
THE AMOUNT THAT CANADIANS WOULD BE WILLING TO PAY IS BELOW WHAT THEY ACTUALLY REPORTED PAYING

Q: What would you be willing to pay in a month for the current video services that you subscribe to?
Source: Mindshare’s Stuff We Watch Proprietary Study, Q2 2020