

A family is shown in a living room, watching a television. The TV displays a scene with a man and a woman. The man is holding a smartphone. The woman is smiling. The living room is dimly lit, with a large window in the background showing a bicycle and some plants. A guitar is leaning against the TV stand. A child is lying on a sofa to the right, and another child is sitting on the floor in front of the TV, looking at a book or tablet. The overall atmosphere is relaxed and domestic.

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 LOVE 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 & WELL

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.

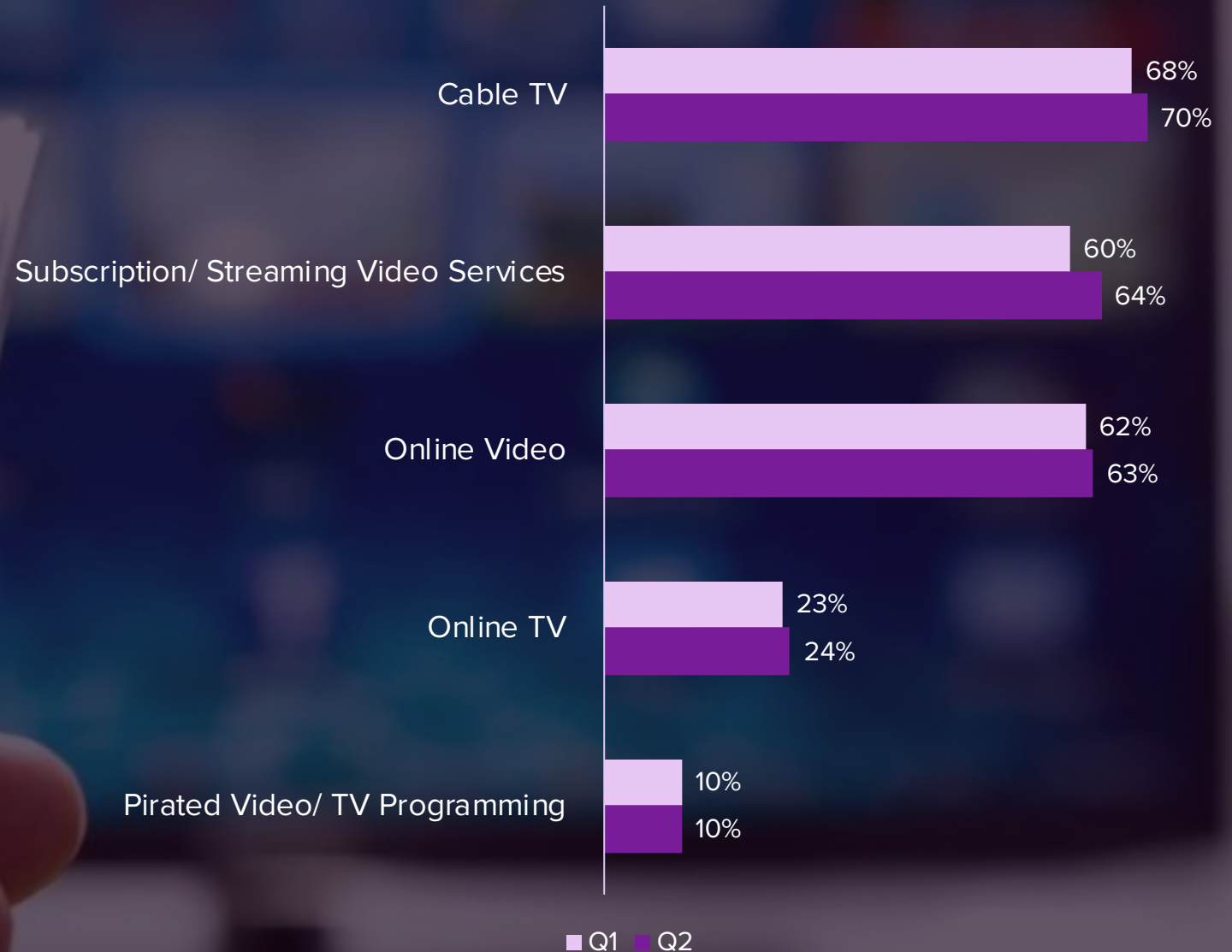
Two-thirds of TV subscribers don't plan on cutting the cord.



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

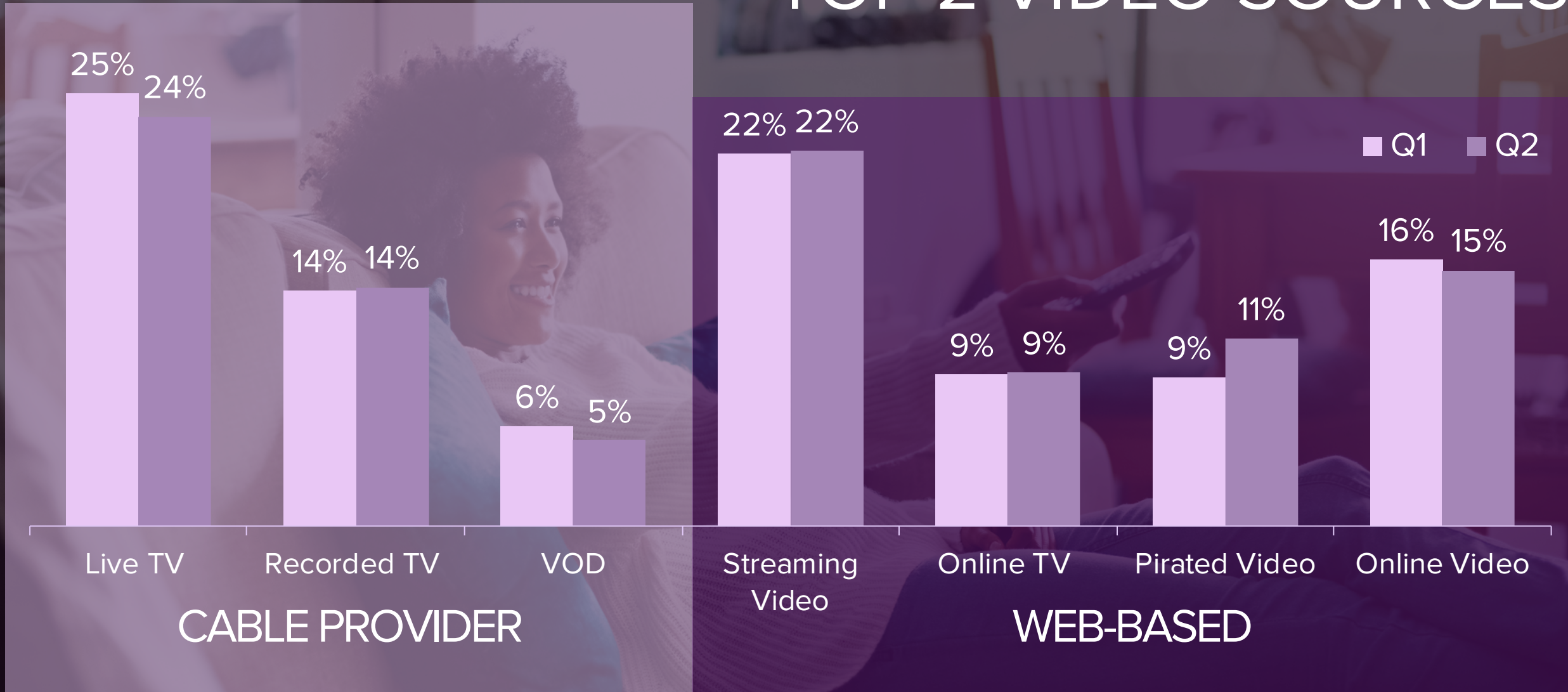


"Do you currently subscribe or access any of the following services?"

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

Based on online TV viewers

LIVE TV AND STREAMING ARE OUR TOP 2 VIDEO SOURCES



"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

2/
3

VIDEO ON DEMAND

OF CANADIANS KNOW
WHAT VIDEO-ON-DEMAND
IS THROUGH THEIR CABLE
TV PROVIDER



2/3

OF CURRENT CABLE
SUBSCRIBERS HAVE NO
CURRENT PLANS ON
CUTTING THE CORD

CANADIANS ARE LOOKING FOR MOVIES AND TO WATCH TRUE CRIME/ DOCUMENTARIES

Exclusive Movies on Streaming Services

True Crime/ Documentaries

First Run Movies from Theatres

Made for TV Movies

Sitcoms

Sports

Cartoons

Scripted Dramas

Reality TV

News

50%

41%

37%

36%

33%

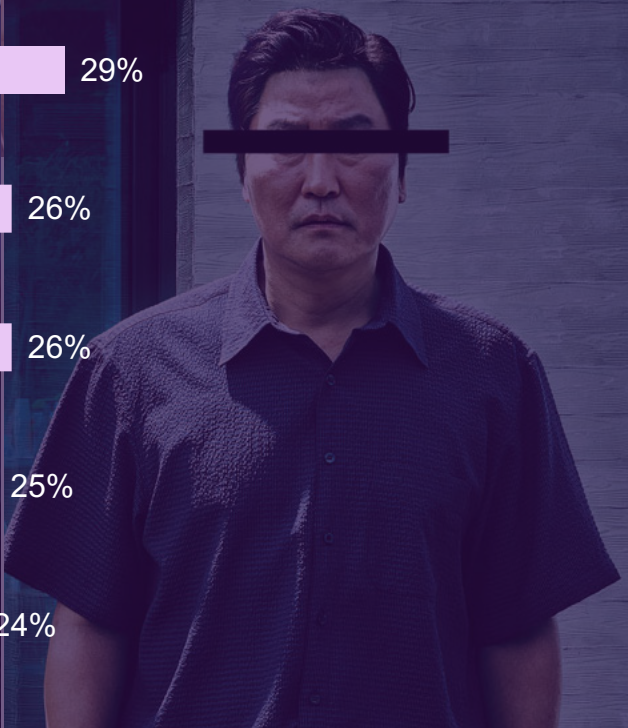
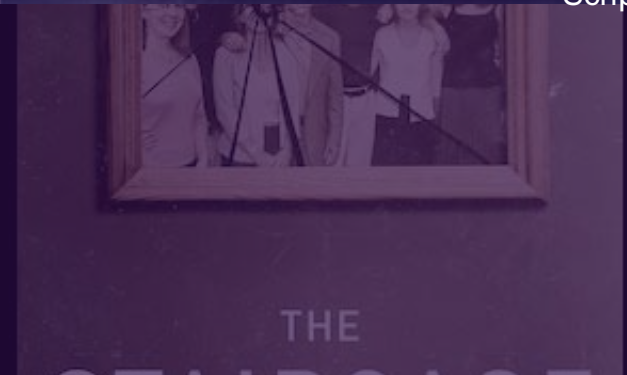
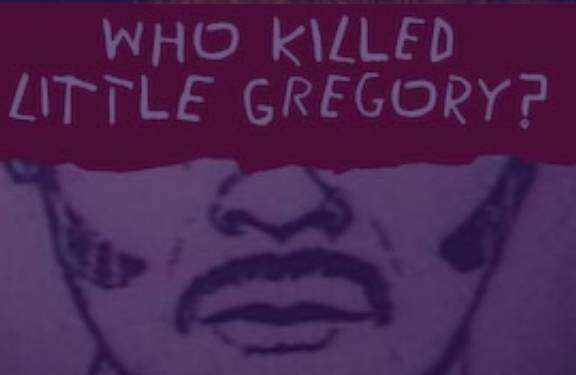
29%

26%

26%

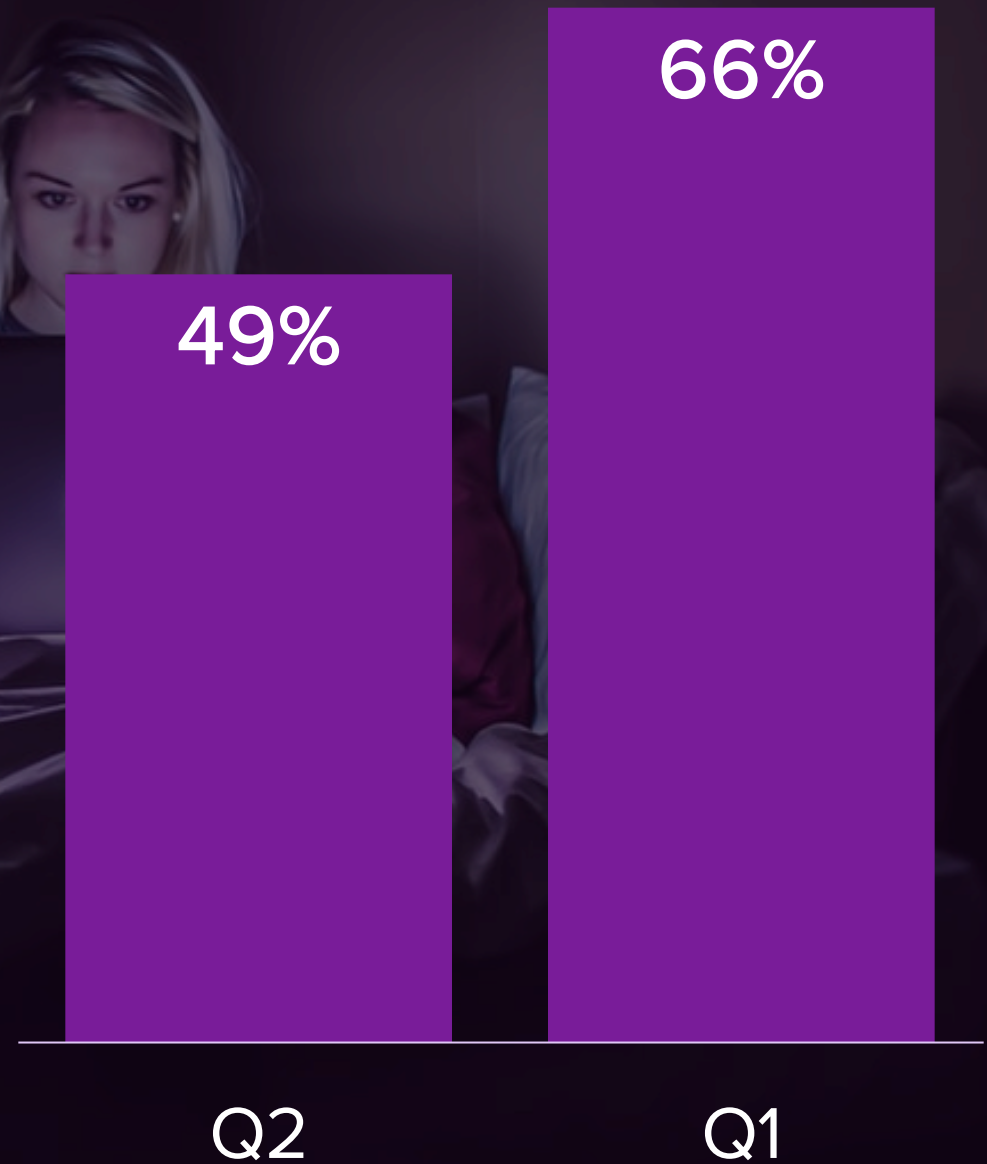
25%

24%



Q: What type of content are you looking to pay for in a video service?

FEWER CANADIANS BINGED WATCHED A SHOW IN Q2



TOP SHOWS BINGED

#1

OZARK

#2

**MODERN
FAMILY**

#3

**GREY'S
ANATOMY**

#4

FRIENDS

#5

THE OFFICE

CANADIANS LIKE GETTING RECOMMENDATIONS FROM FRIENDS AND FAMILY WHEN FINDING NEW SHOWS

49%

Getting a recommendation from friends and family

40%

Saw an ad/
Promotion on TV
for a new TV show

29%

I heard a lot of
positive buzz and
wanted to check it
out

23%

Promoted on the
main page of a
streaming platform

22%

Had an
actor/actress that I
wanted to watch

HALF OF CANADIANS WATCH BETWEEN 2-5 SHOWS A WEEK

56%

2-5 SHOWS A WEEK

21%

6-10 SHOWS A WEEK

12%

1 SHOW A WEEK

12%

11 OR MORE SHOWS A WEEK

SECTION
1

SUBSCRIPTION
STREAMING SERVICES

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

70%

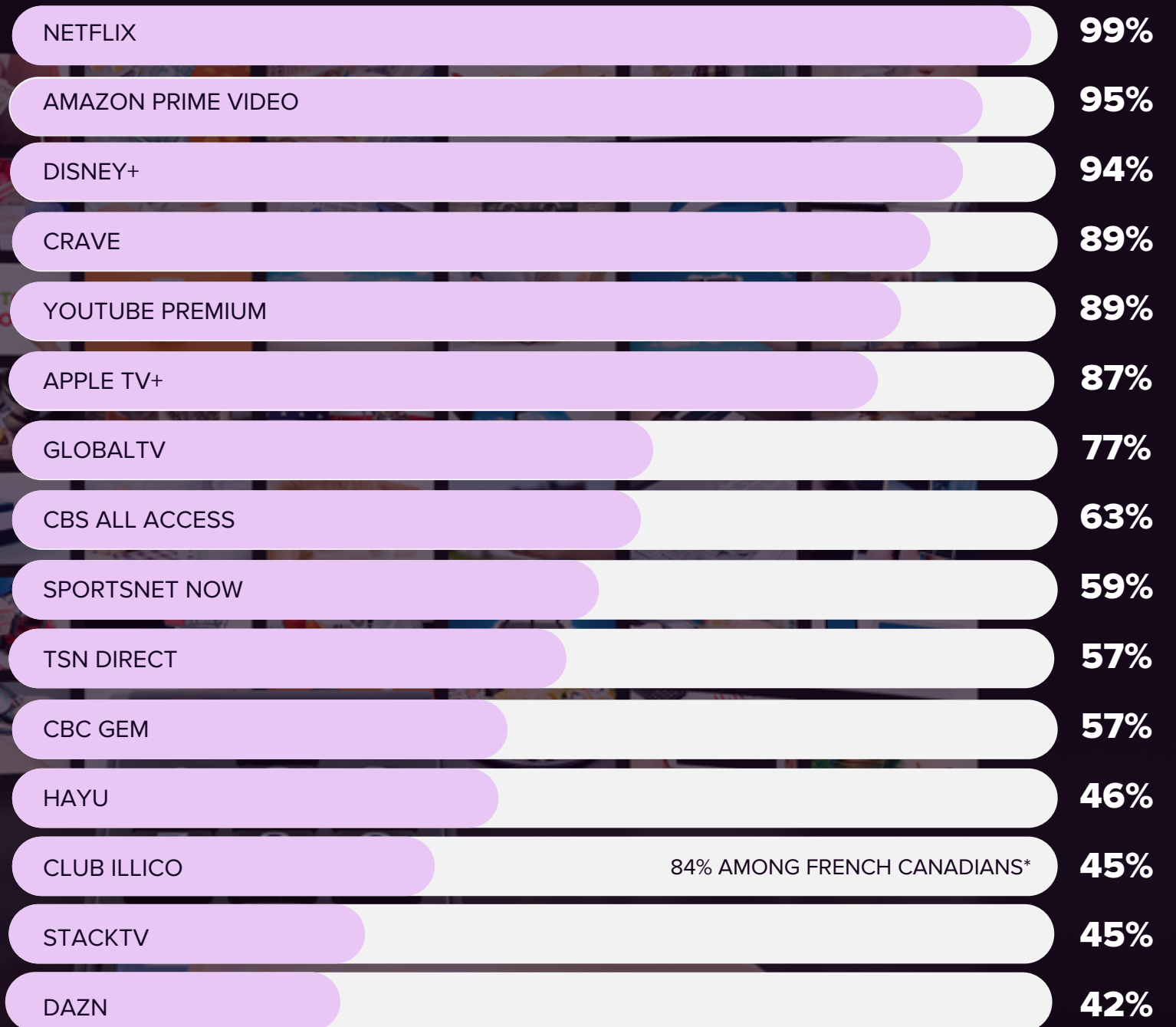
ENGLISH
CANADIANS

51%

FRENCH
CANADIANS

CANADIAN SUBSCRIPTIONS ARE BEHIND GLOBAL PLATFORMS

% of Canadians aware of the platform



"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

A hand holding a black remote control is positioned in the foreground, pointing towards a television screen. The television screen displays the word "NETFLIX" in large, orange, block letters. The background is slightly blurred, showing a wooden surface and two potted plants on either side of the TV. The overall lighting is dim, creating a cozy atmosphere.

2/3 | OF NETFLIX USERS
PAY FOR ACCESS

"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

A photograph of a family in a modern living room. A man in the foreground is sitting on a couch, looking at a tablet. In the background, two children are sitting on another couch, one using a laptop and the other a tablet. A large television on the wall shows a news program. The room has large windows with blinds and a potted plant.

1.9

AVERAGE NUMBER OF
STREAMING
SUBSCRIPTION SERVICES
A HOUSEHOLD HAS

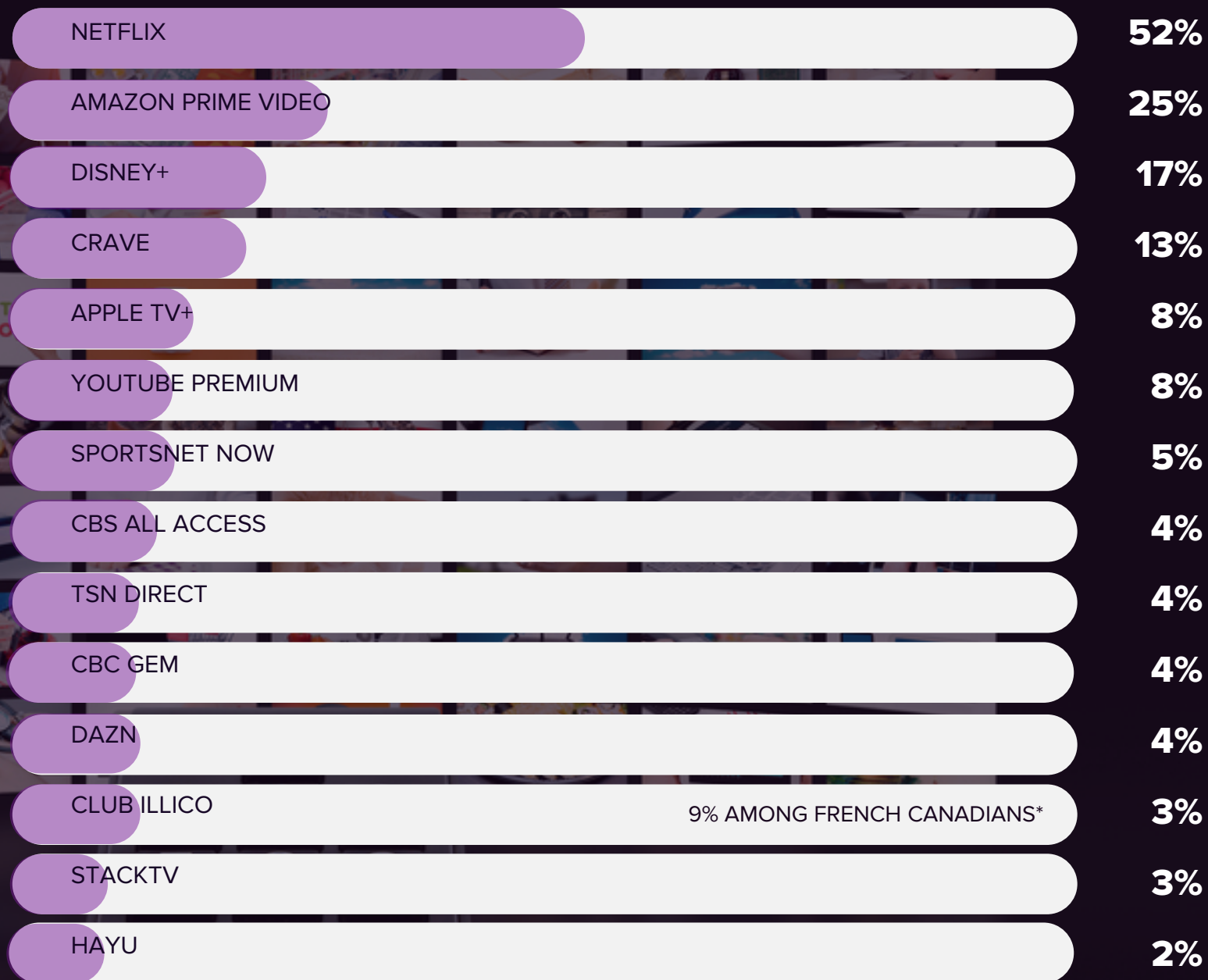
"What video subscription does your household pay for and which ones do you have access to but someone else pays for?"

[Based on total Canadians]

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

NETFLIX IS KING BUT DISNEY+ HAS CAUSED MORE DISRUPTION

% of Canadians who access the platform



9% AMONG FRENCH CANADIANS*

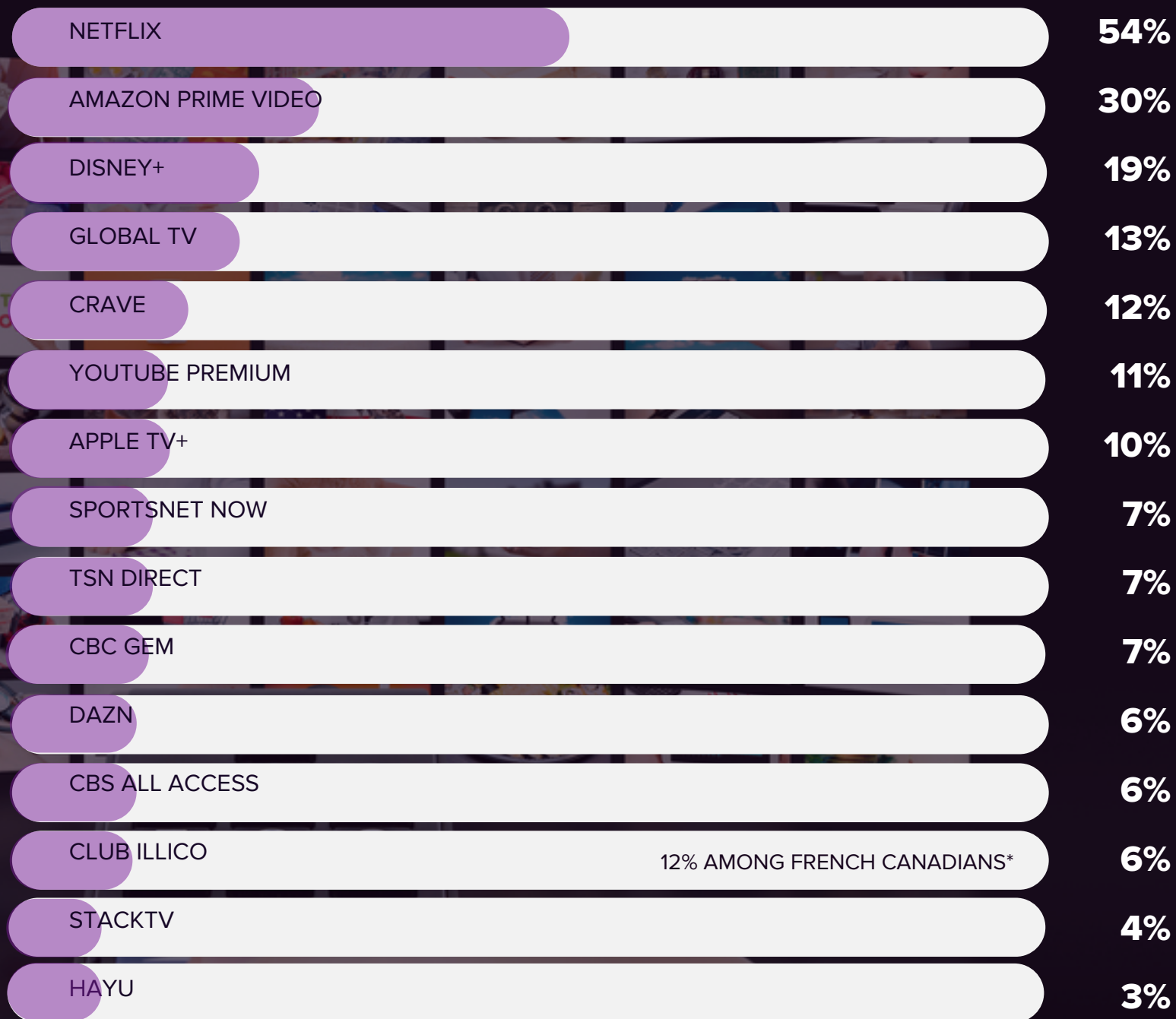
"What video subscription does your household pay for and which ones do you have access to but someone else pays for?"

[Based on total Canadians]

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

NETFLIX IS KING BUT AMAZON PRIME VIDEO IS CATCHING UP

% of Canadians who access the platform



"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

CANADIANS ARE AWARE OF PLATFORMS BUT DON'T ACCESS AT HOME

NETFLIX

AWARE

99%

USE

54%

PRIME VIDEO

AWARE

95%

USE

30%

DISNEY+

AWARE

94%

USE

19%

"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%

IN Q2 WE WERE LOOKING TO ADD PLATFORMS WITH OUR FAVORITE VIDEOS



DISNEY+
20%



PRIME VIDEO
19%



CRAVE
13%



YT PREMIUM
11%



DAZN
9%



APPLE TV+
9%

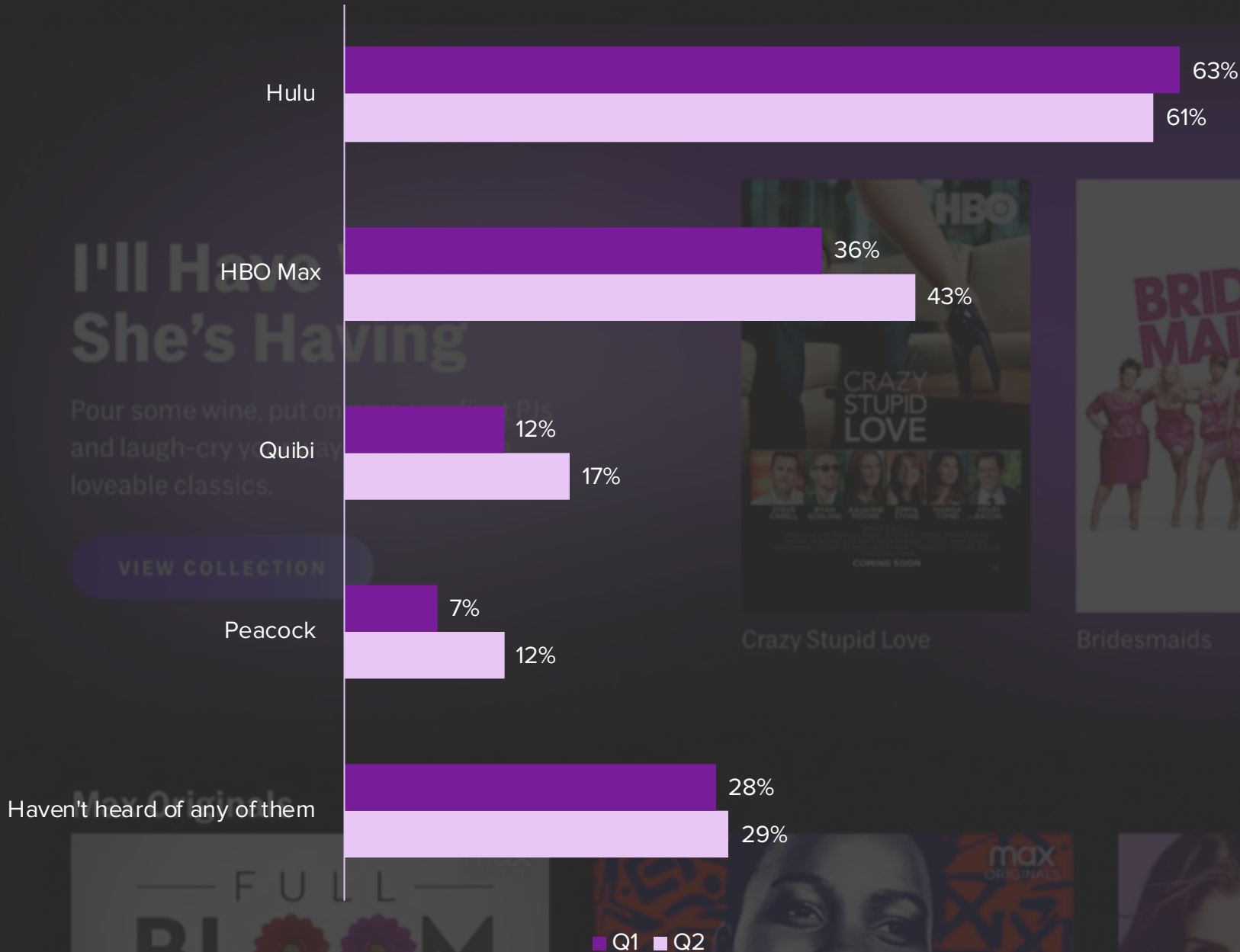
In Q2 subscribers went back to adding mainstream subscription platforms to their suite of services.

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



HULU IS THE MOST COMMON STREAMING SERVICE, BUT HBO MAX AND QUIBI ARE ON THE RISE IN Q2

CITYTV IS USED
WEEKLY BY 45%

CityTV/CityTV.com

45%

OF CANADIANS
AND GLOBAL TV
AND CTV HAVE

CTVGo/CTV.ca

33%

JUST OVER 30%
OF CANADIANS
USING THEM

Global/GlobalTV.com

31%

WEEKLY

CBC/CBC Gem or CBC.ca

8%

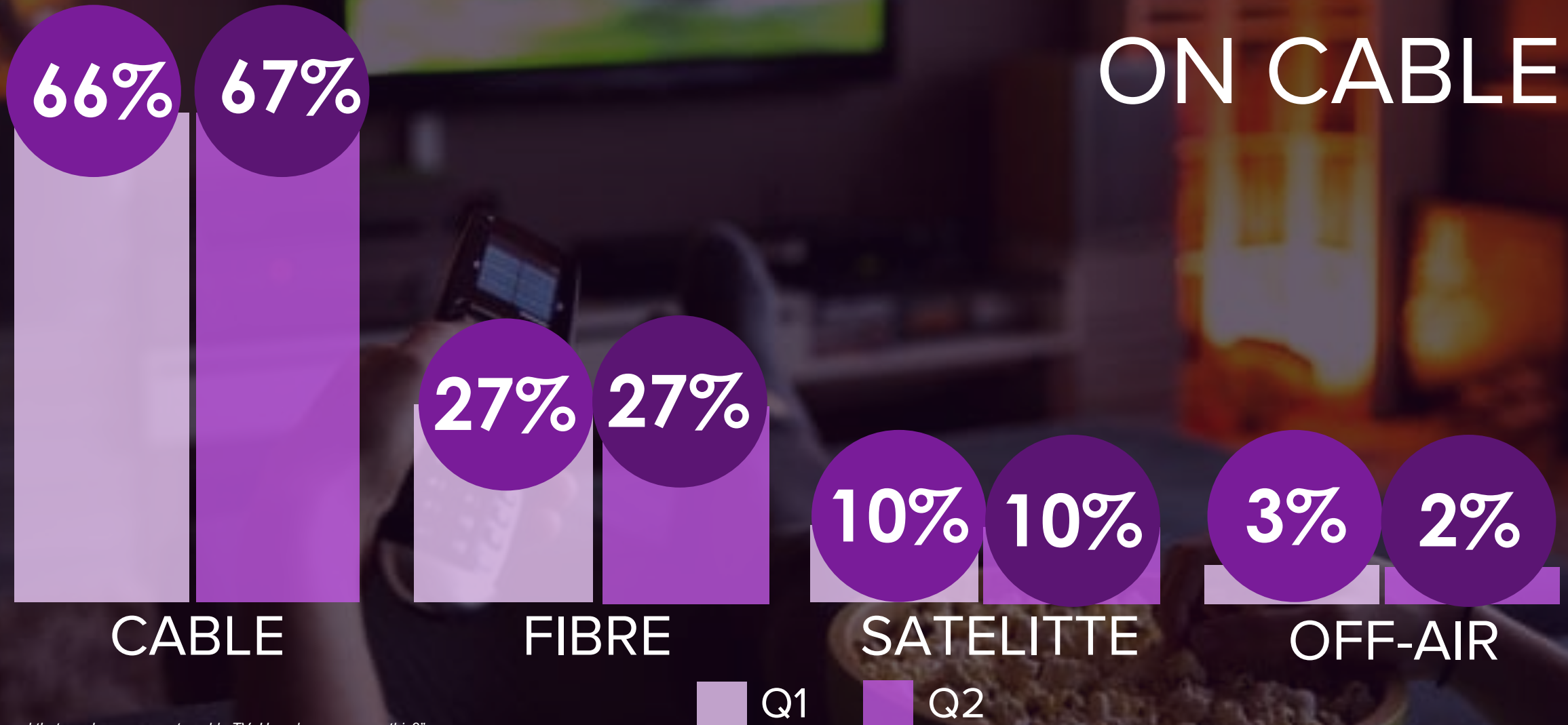
"What online TV websites do you use at least once a week?"
Source: Mindshare's Stuff We Watch Proprietary Study, Q2 2020
Based on the number of people who said they watched online TV

SECTION
2

TRADITIONAL TV
VIEWING



CANADIANS ARE STILL ON CABLE





10.2M

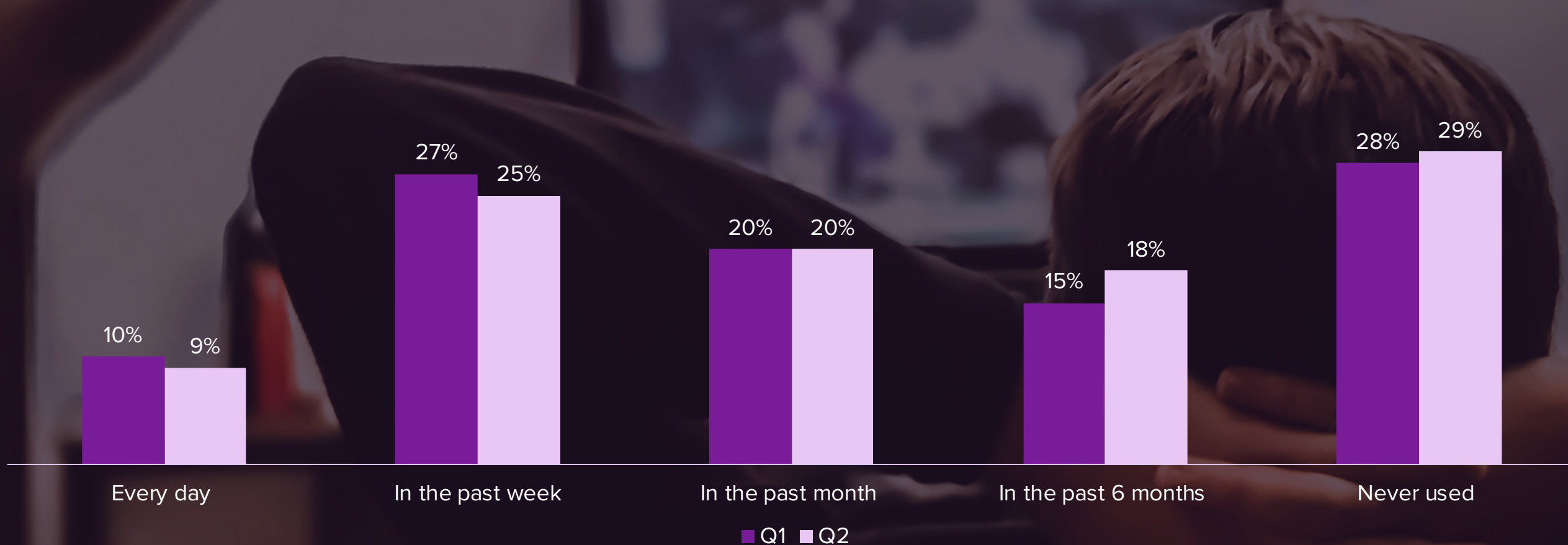
CANADIAN
HOUSEHOLDS ACCESS
CABLE



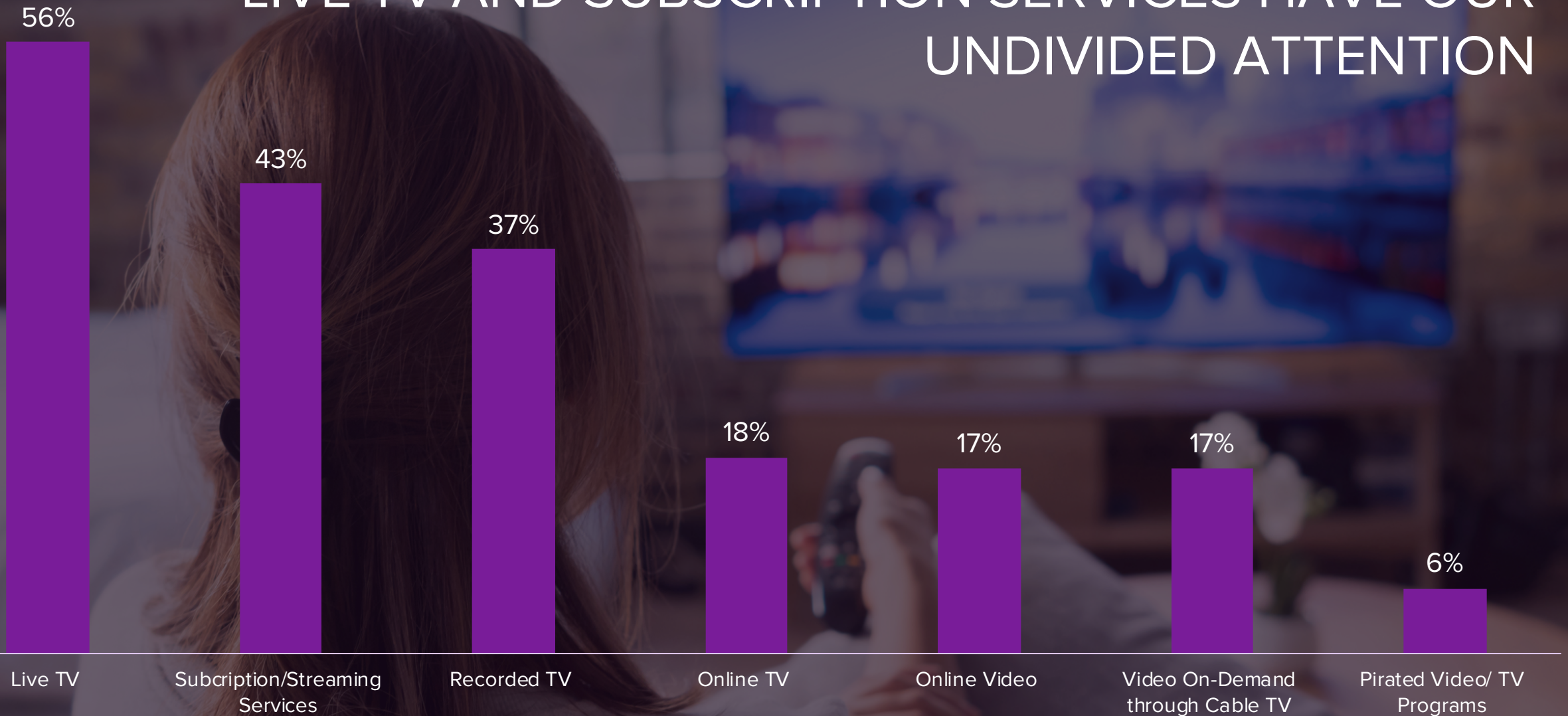
2/3

OF CANADIANS HAVE
A PVR

IN Q2 THERE WAS SLIGHT DECREASE THE AMOUNT OF CANADIANS WHO WATCHED VIDEO ON DEMAND IN THE PAST MONTH

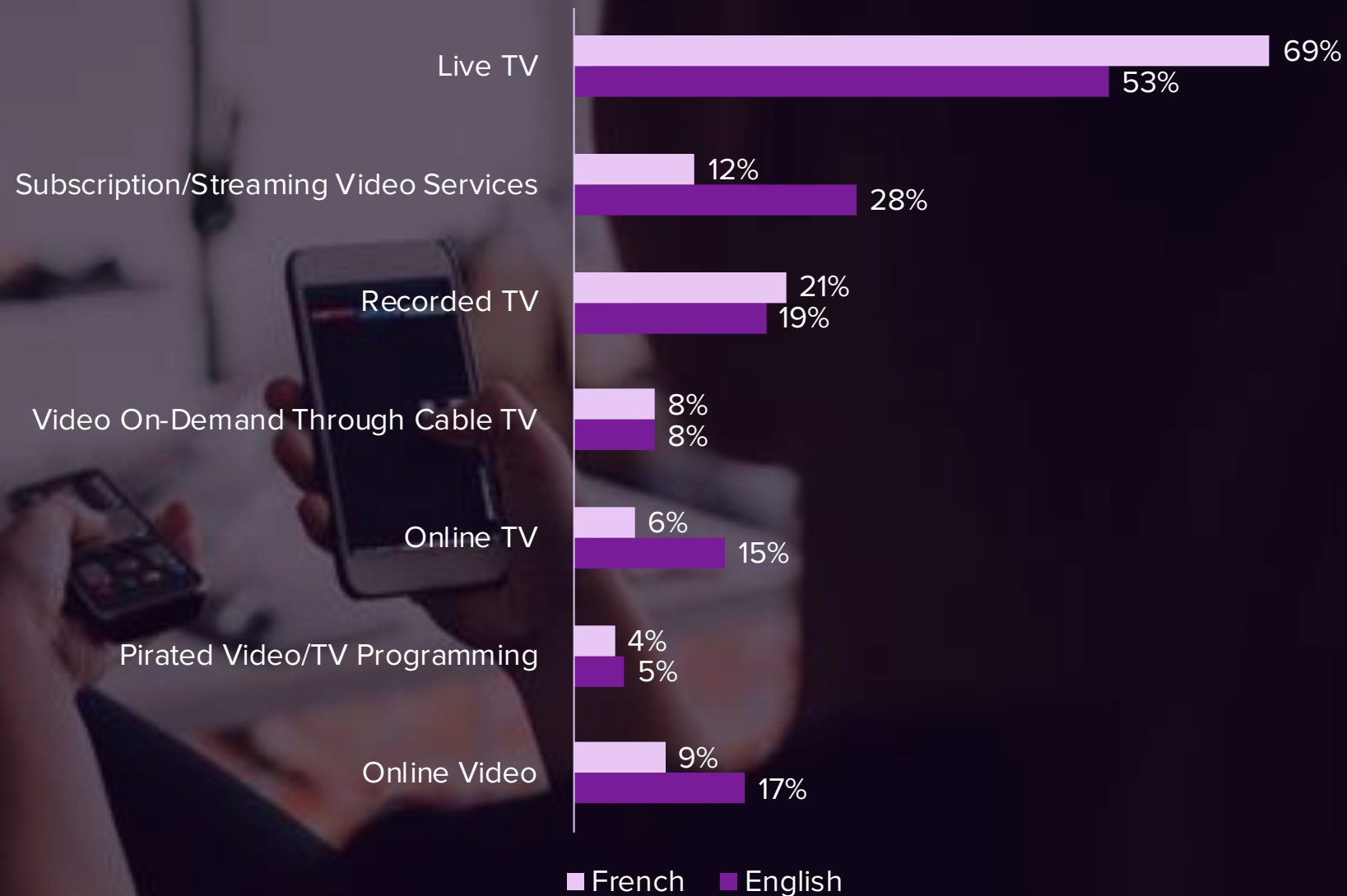


LIVE TV AND SUBSCRIPTION SERVICES HAVE OUR UNDIVIDED ATTENTION



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

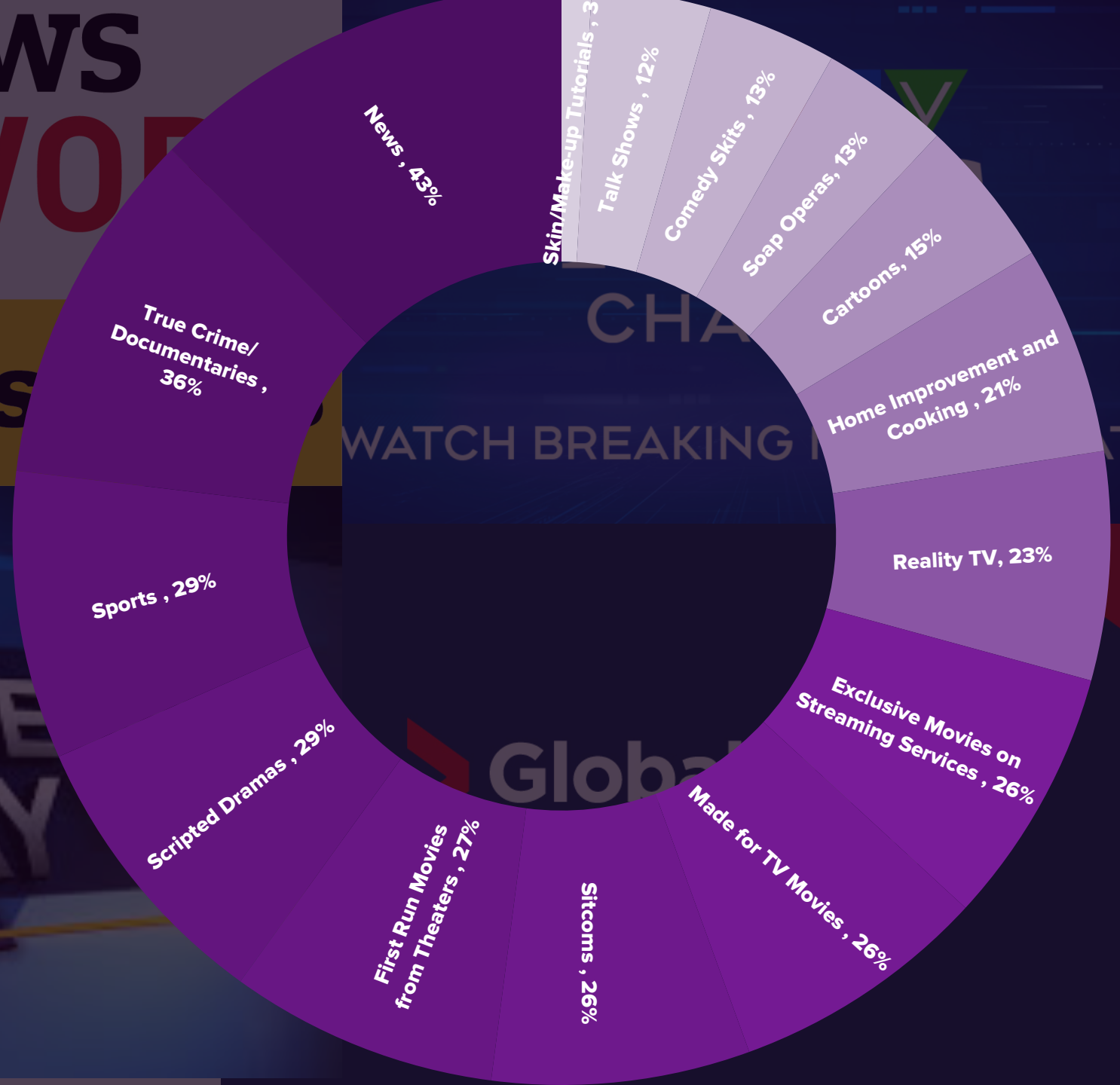
LIVE TV IS USED AS BACKGROUND NOISE



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

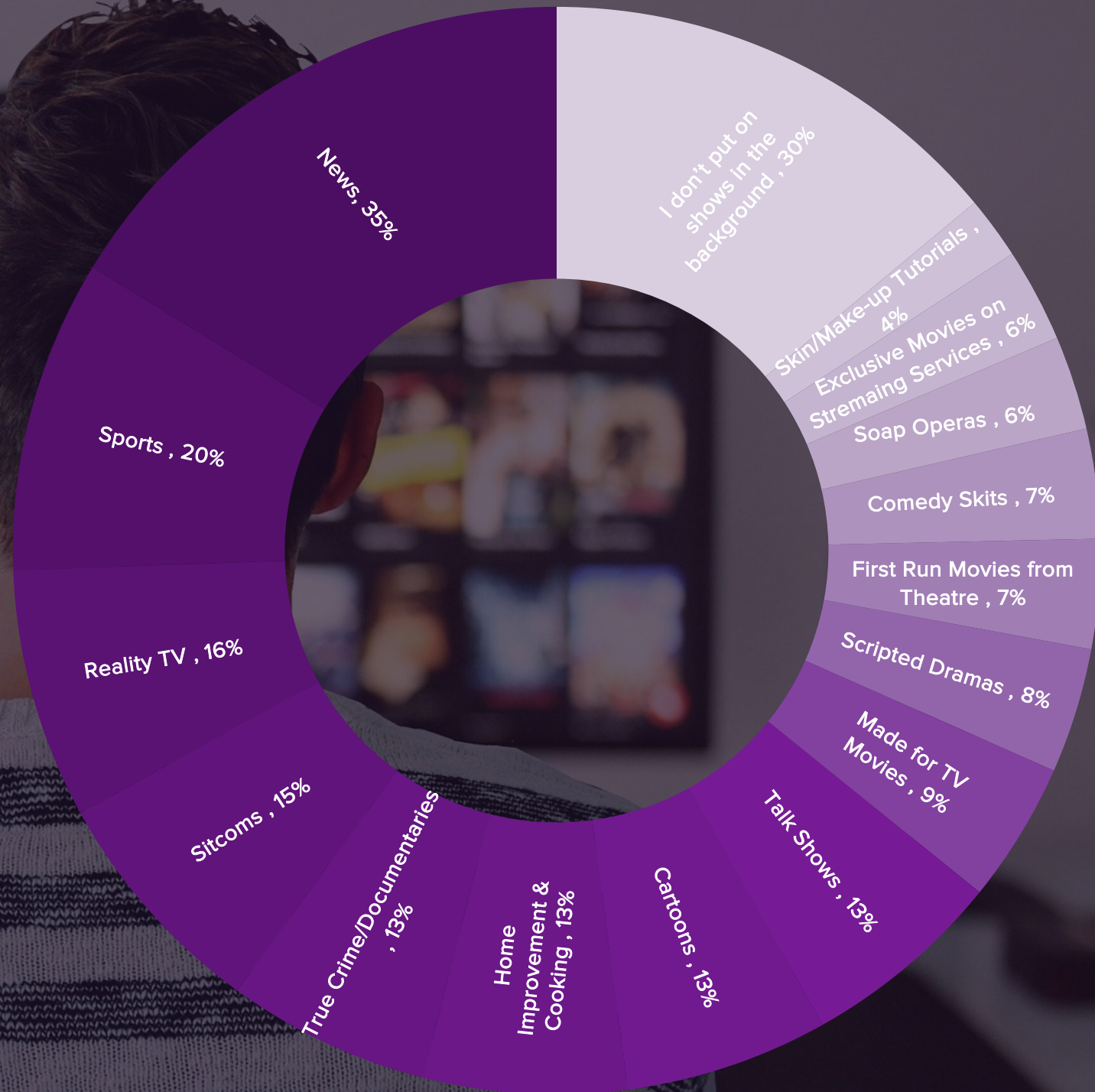
Source: Mindshare's Stuff We Watch Proprietary Study, Q2 2020

CBCnews
THE NEWS HAS
CANADIANS
UNDIVIDED
ATTENTION,
FOLLOWED BY
TRUE
CRIME/DOCUMENT
TARIES 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 your doing something else?

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

A person is sitting on a brown leather tufted sofa. Their legs are crossed, and they are wearing dark pants and patterned socks. A small white box of popcorn sits on a dark coffee table in front of them, with some popcorn spilled on the table. The background is dark and out of focus. The text 'SECTION 3' is overlaid on the left side of the image.

SECTION

3

ENTERTAINMENT BUDGET MANAGEMENT

IN Q1, WE SPENT 4X MORE ON CABLE



IN Q2, WE SAW A RISE IN PRICE FOR MOST SERVICES





more than
half
of Netflix Subscribers

WOULD PAY AN
ADDITIONAL
\$2 A MONTH

"If Netflix increased prices tomorrow by \$2, would you remain a subscriber?"

[based on Netflix users]

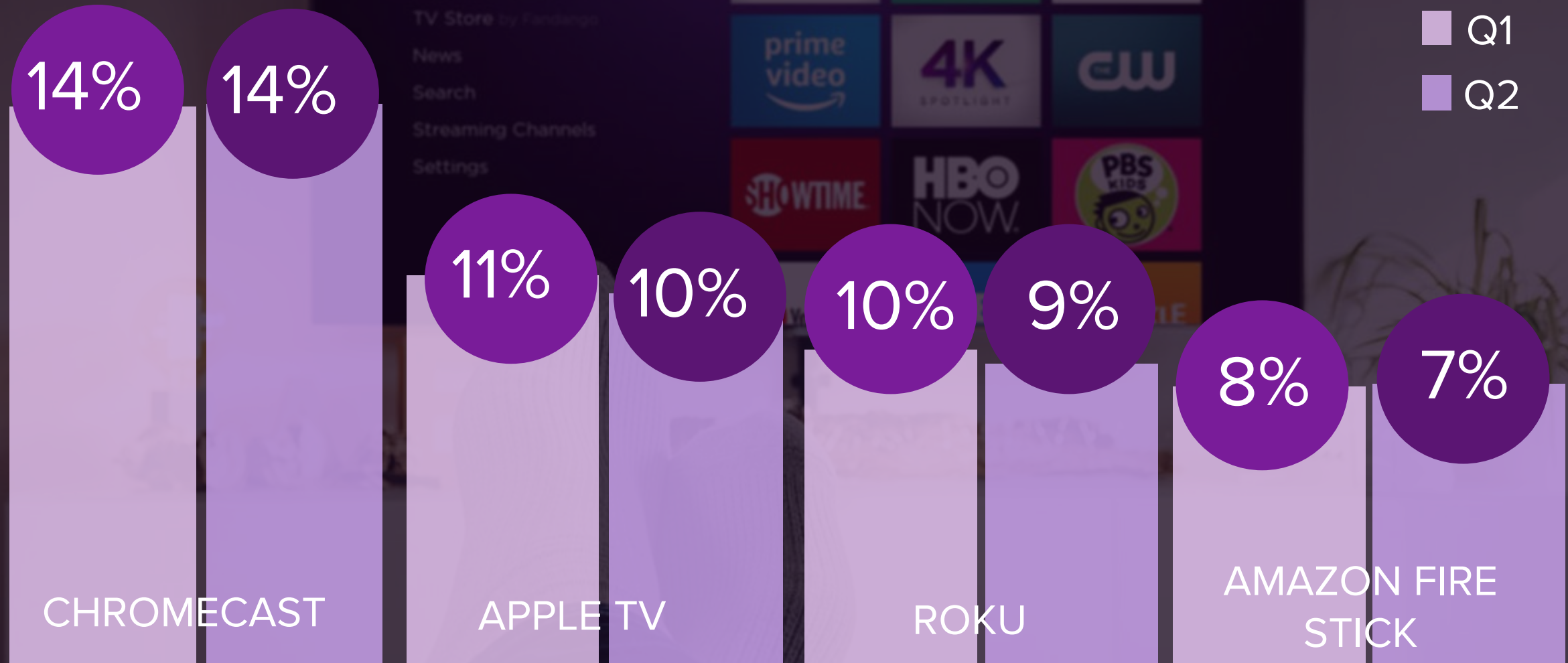
Source: Mindshare's Stuff We Watch Proprietary Study, Q2 2020

The background of the entire image is a close-up, slightly blurred photograph of various Canadian banknotes. Visible denominations include a \$20 bill (green), a \$50 bill (red), and a \$100 bill (purple). The bills are scattered and overlapping, creating a textured, financial backdrop. The text is overlaid on this background in a clean, white, sans-serif font.

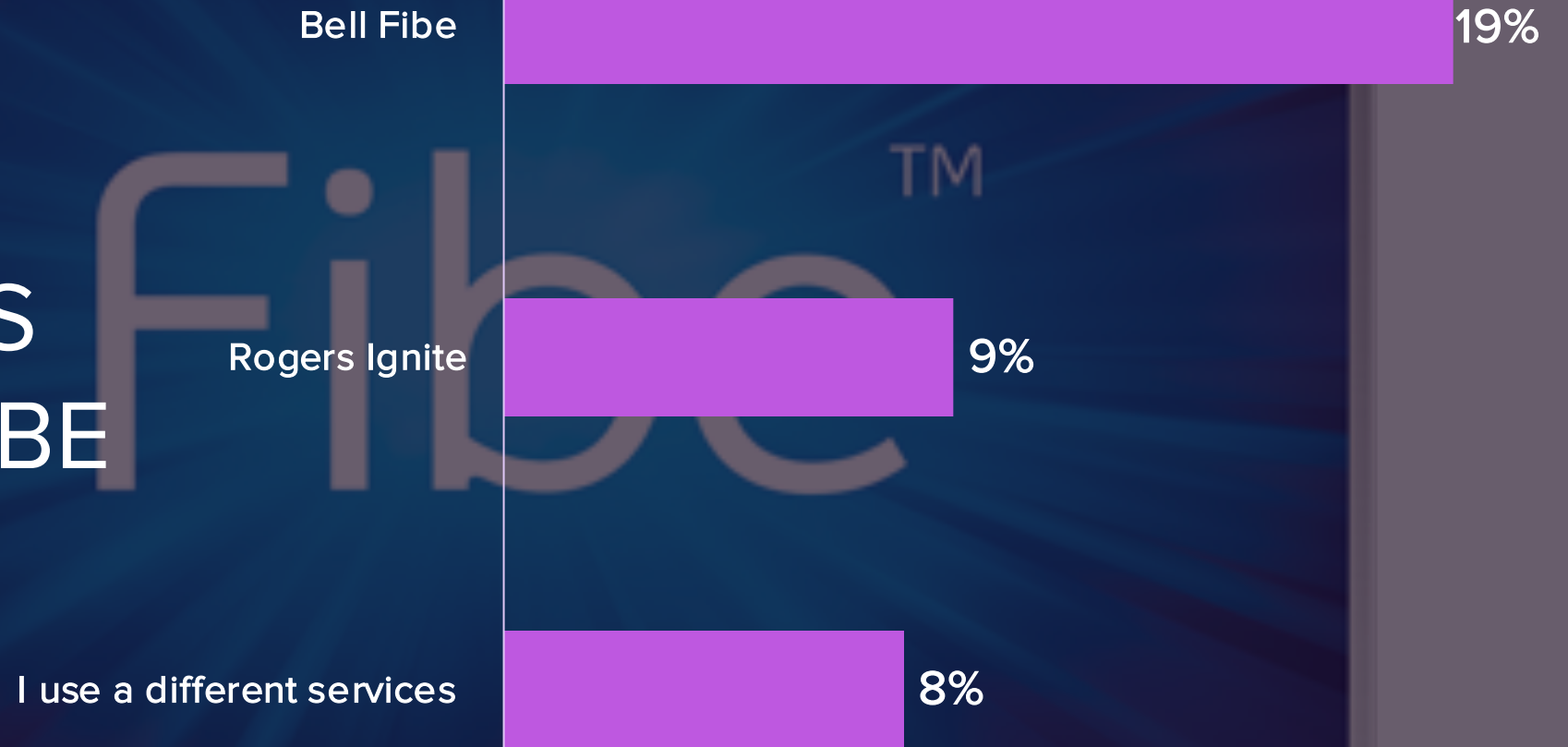
1 in 3
Canadians

EXPECT THEIR TOTAL
ENTERTAINMENT BUDGET
TO INCREASE IN THE NEXT
12 MONTHS

WE AREN'T FAMILIAR WITH THE PLATFORMS THAT WE USE IN OUR HOMES



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.

High speed

Fibe

Low

I don't have broadband Internet at home

27%

31%

62%

57%

6%

5%

5%

7%

■ Q2 ■ Q1

40% OF CANADIANS FIND THAT SOMETIMES THAT TV ADS ARE RELEVANT TO THEM

I do everything I can to skip ads

Always

Sometimes

Rarely

6%

6%

40%

41%

35%

35%

19%

18%

■ Q2 ■ Q1

The background features a stylized illustration of a crowd of people in dark red silhouettes. Above them are several speech bubbles, also in dark red, each containing the word "AD!" in white, bold, sans-serif capital letters. The overall color palette is a monochromatic dark red and grey.

3/4

OF CANADIANS SAY THEY
RECEIVE TOO MANY ADS

CANADIANS SEE THE SAME ADS ALL THE TIME

43%

I SEE THE SAME ADS ALL THE TIME

36%

A GOOD MIX

17%

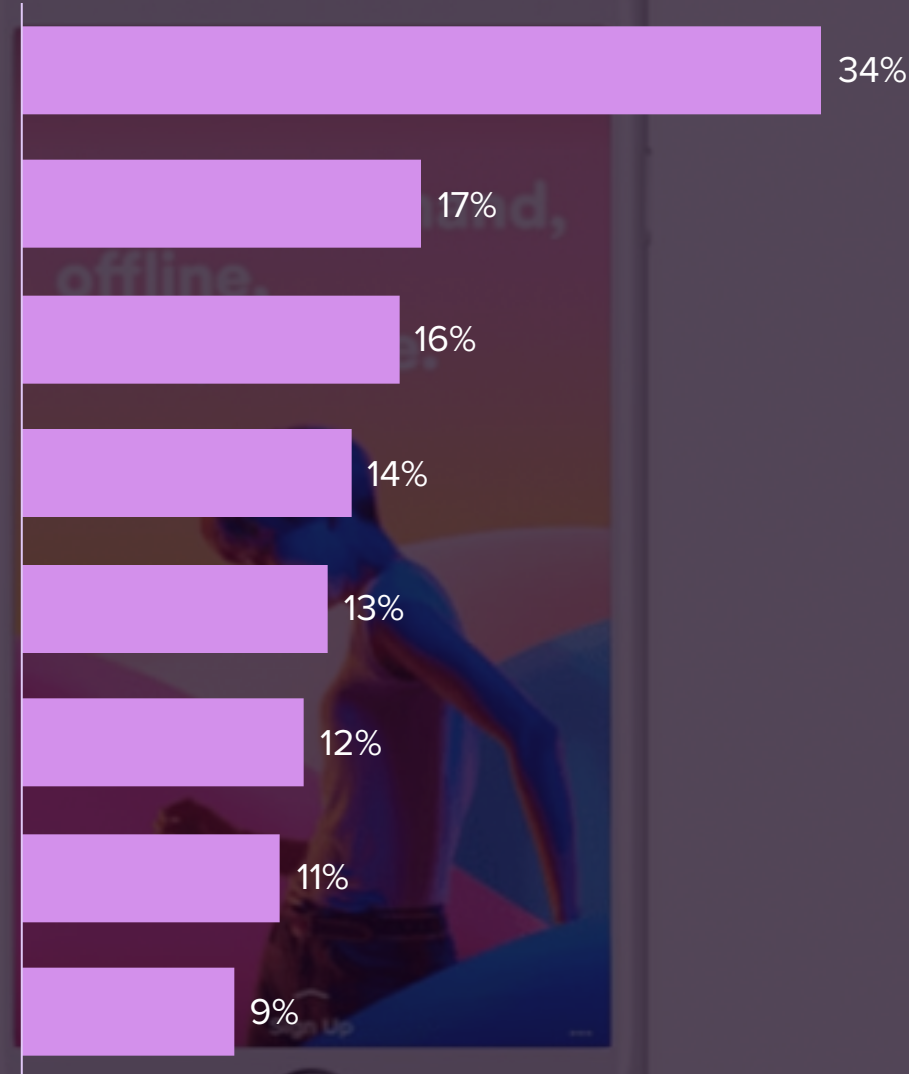
A LOT OF DIFFERENT ADVERTISERS

3%

I HAVE NEVER SEEN THE SAME AD

1/3 OF CANADIANS SAY THAT THEY LIKE VIDEO ADS THE LEAST OUT OF ALL TYPES OF ADS

- I like video ads the least out of all types of ads
- I like video ads better than audio ads
- I like video ads that are on TV better than video ads
- I like video ads better than banner ads on websites
- I like video ads better than social media
- I like video ads the best out of all types of ads
- I like video ads better than billboard ads
- I like video ads better than magazine or newspaper ads





11:54a

FEATURED TV



Yellowstone
TV Show | Drama



Snowfall



America's Got Talent



Leah Remini: Scientology ...



Big Bro

SCANDALOUS TV



Dance Moms



90 Day Fiancé: Before the ...



Married at First Sight



Love After Lockup



The Fa

Appendix

CANADIANS ARE LOOKING FOR MOVIES AND TO WATCH TRUE CRIME/ DOCUMENTARIES

Exclusive Movies on Streaming Services

True Crime/ Documentaries

First Run Movies from Theatres

Sitcoms

Made for TV Movies

Sports

Cartoons

Scripted Dramas

Reality TV

News

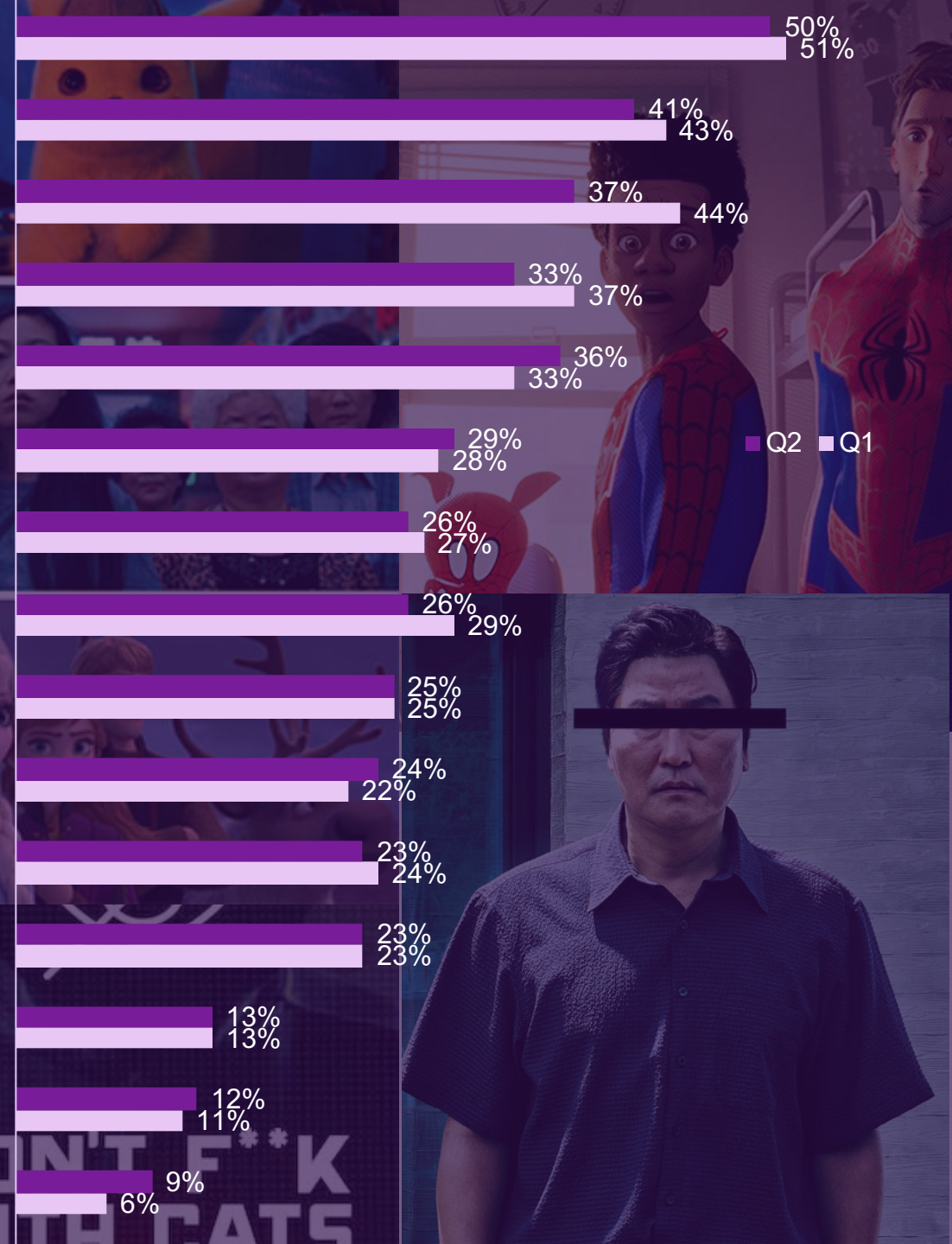
Comedy Skits

Home Improvement & Cooking

Talk Shows

Soap Opera

Skin/Make-up Tutorials



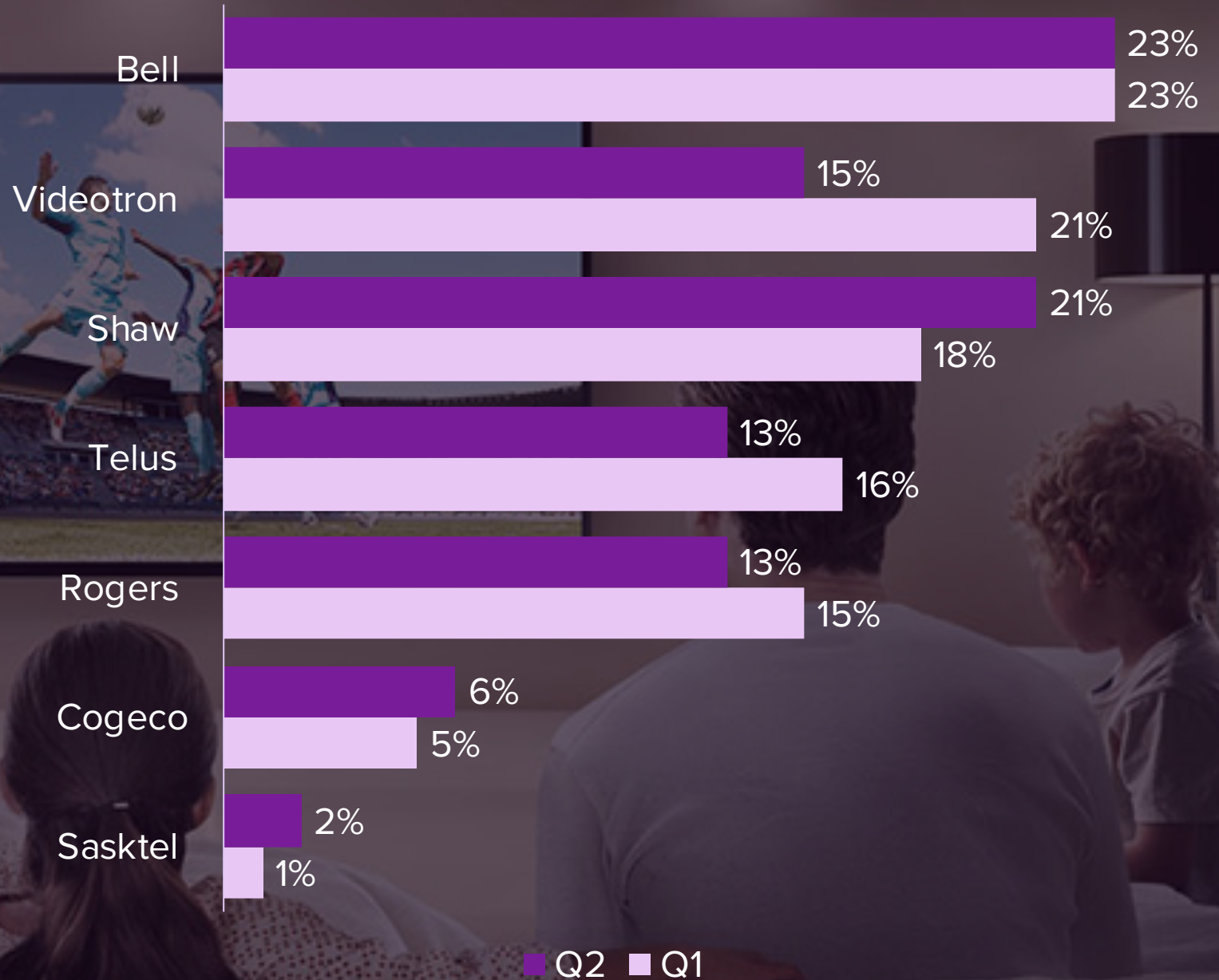
WHO KILLED
LITTLE GREGORY?

THE
STAIRCASE

DON'T F**K
WITH CATS

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



2/3 OF CANADIANS HAVE A PVR

67%

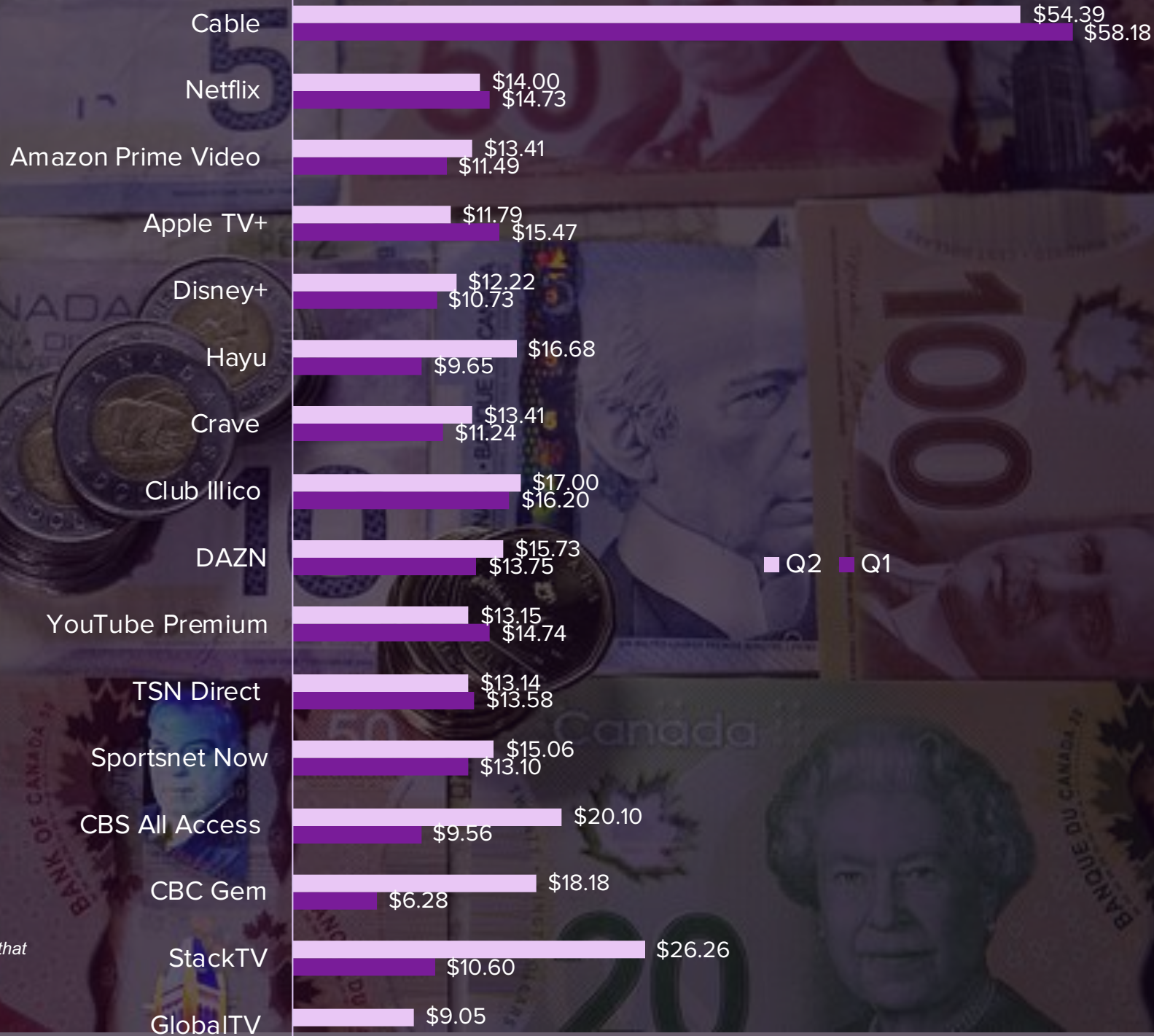


66%



■ Q1 ■ Q2

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