

think^{tv}

THE QUARTERLY

A quick look at Fall 2015

Feb 3 2016

TV CONTINUES TO REACH JUST ABOUT EVERYBODY

FALL AVERAGE WEEKLY REACH (WEEKS 2-16)							
Q1 STATS >>	AVERAGE WEEKLY REACH (%)						
	Ind.2+	Male	Female	A18+	A18-34	A25-54	C2-11
Q1 2015	99.1	98.9	99.3	99.1	98.9	97.8	99.4
Q1 2014	99.1	99.2	99.1	99.1	99	98	99.6
Q1 2013	99.4	99.3	99.5	99.4	99.5	99.2	99.5
Q1 2012	99.4	99.2	99.6	99.5	99.4	99.1	98.9
Q1 2011	98.7	98.8	98.7	98.8	98.4	98.3	98.3
Q1 2010	99.2	99.1	99.3	99.3	99	98.2	98.2
Q1 2009	99.6	99.5	99.7	99.7	99.7	99.4	98.8



TV IS THE #1 MEDIUM FOR REACH AND TIME SPENT

REACH

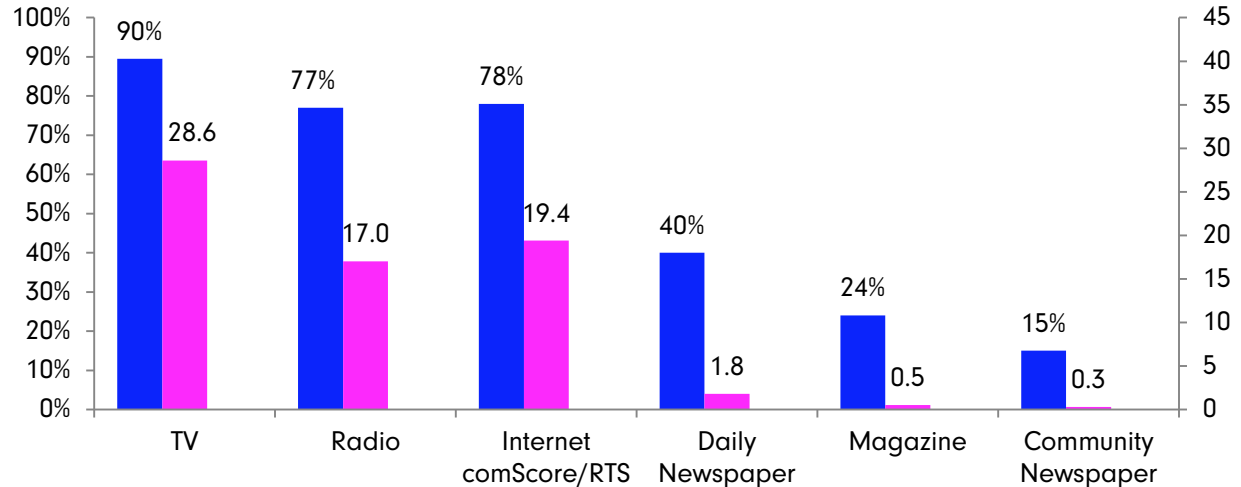
Television reaches 90% of the Canadian adult population on a daily basis.

TIME SPENT WATCHING TV

Exceeds all other media:

- 47% more than the Internet
- 68% more than Radio

■ DAILY REACH % ■ AVERAGE WEEKLY HOURS PER CAPITA



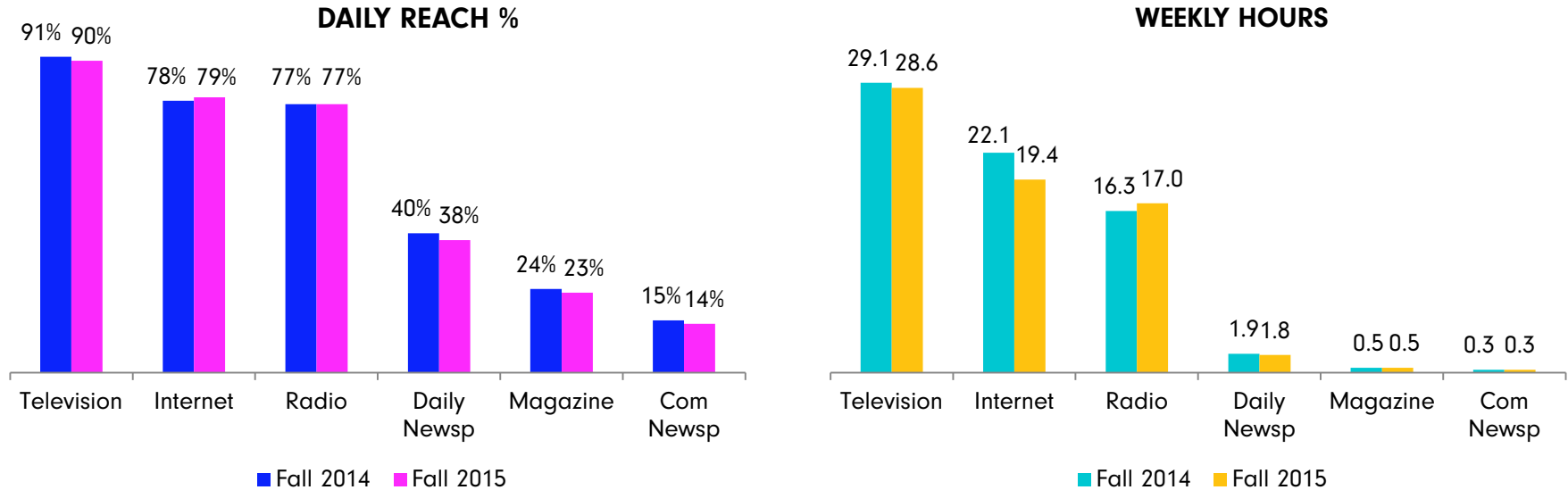
Adults 18+

Sources:

- Television: Numeris, Infosys TV, Total Canada, Full Week (Mo-Su 2a-2a), Weeks 2-16 (Sep 7 – Dec 20, 2015), A18+
- Numeris RTS, Fall 2015 (Internet Daily Reach, Radio, Daily Newspaper, Magazine, Community Newspaper)
- Internet Weekly Hours: comScore Media Matrix; Multi-Platform; Sep - Nov 2015.

*Note: Numeris population estimates for each demographic group used to calculate average weekly hours per capita

TV REACH AND TIME SPENT ARE REMARKABLY CONSISTENT



Adults 18+

Sources:

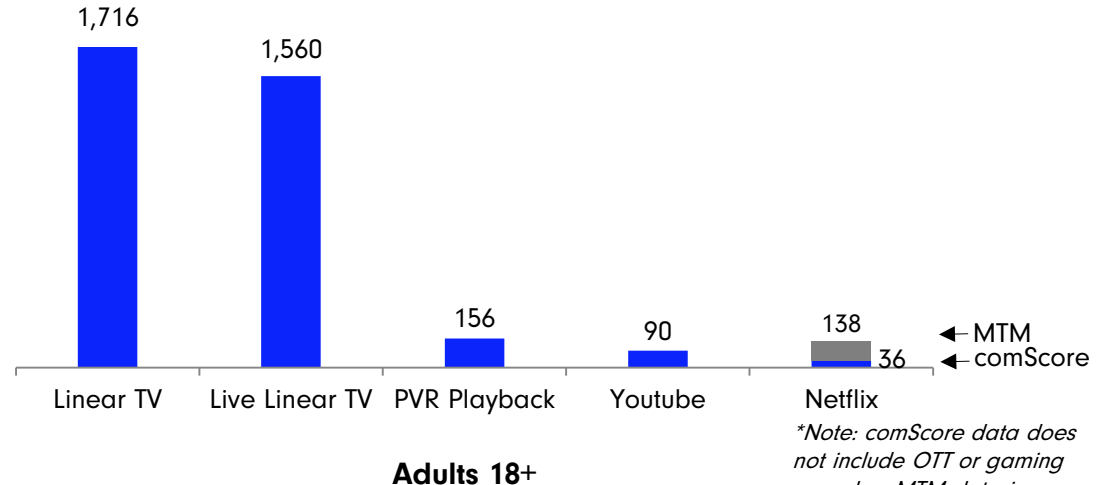
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*Note: Numeris population estimates for each demographic group used to calculate average weekly hours per capita

SCREEN TIME: WATCHING VIDEO

Canadians watched an average 1,716 minutes of TV a week this Fall.

AVERAGE WEEKLY MINUTES PER CAPITA



**Note: comScore data does not include OTT or gaming consoles; MTM data is reported for comparative purposes.*

Sources:

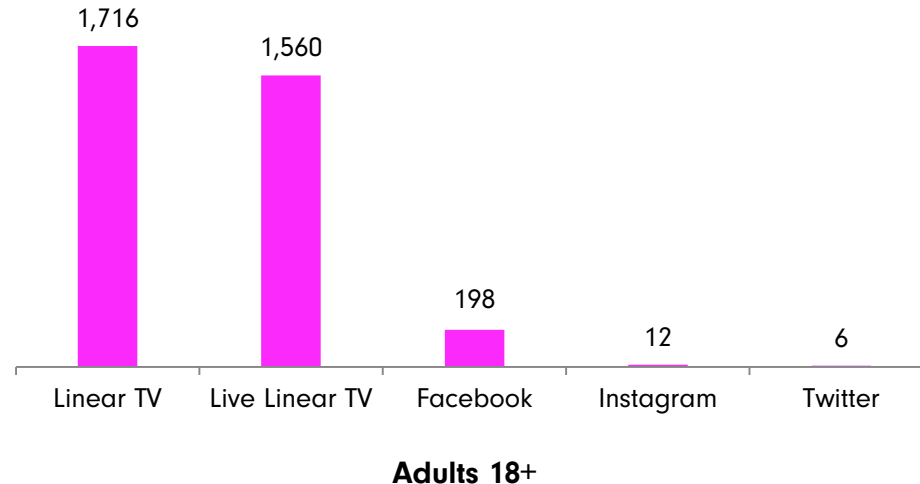
- Linear TV, Live Linear TV, PVR Playback: Numeris; Infosys TV+; Total Canada, Full Week (Mo-Su 2a-2a), 1 minute Reach; Weeks 2-16 (Sep 7 – Dec 20, 2015).
 - Digital: comScore Media Metrix Multi-Platform, 18+, 3 month average (Sep - Nov 2015), [P]Netflix Inc. | Media Technology Monitor, Spring 2015, Netflix mean weekly hours among Total Population.
- *Note: Numeris population estimates for each demographic group used to calculate average weekly hours per capita.*

SCREEN TIME: TV vs SOCIAL MEDIA

Canadians spent far more time watching TV than they spent with social media.

AVERAGE WEEKLY MINUTES PER CAPITA

Canadian Adults spent almost **8x more time watching Linear TV** than they spent with Facebook, Instagram and Twitter combined.



Sources:

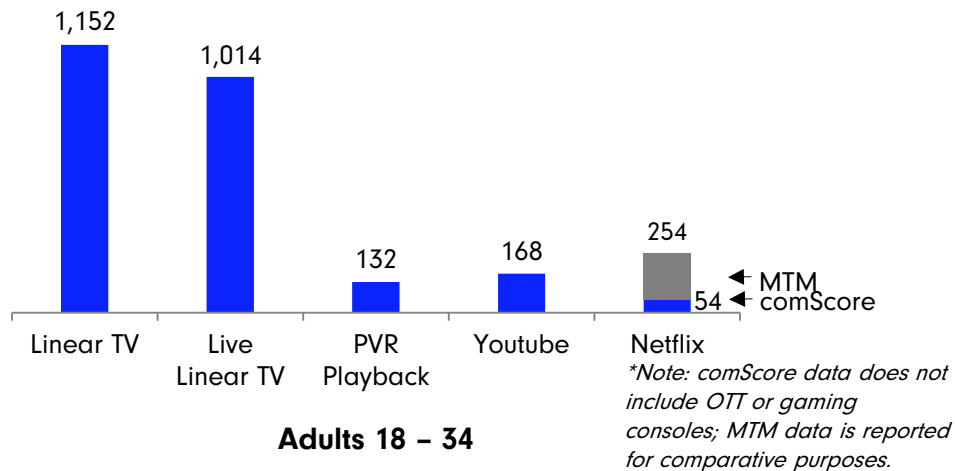
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**Note: Numeris population estimates for each demographic group used to calculate average weekly minutes per capita*

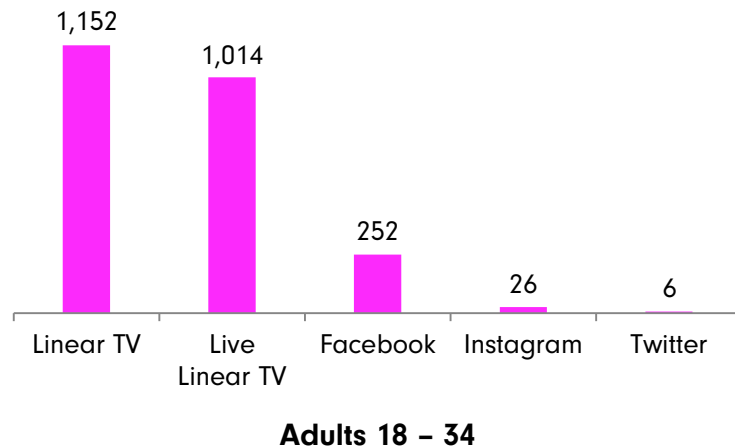
SCREEN TIME & MILLENNIALS

Millennials watched an average of 1,152 minutes of TV per week, compared to only 168 minutes with YouTube and 54 minutes with Netflix.

SCREEN TIME: WATCHING VIDEO
AVERAGE WEEKLY MINUTES PER CAPITA



SCREEN TIME: TV vs SOCIAL MEDIA
AVERAGE WEEKLY MINUTES PER CAPITA

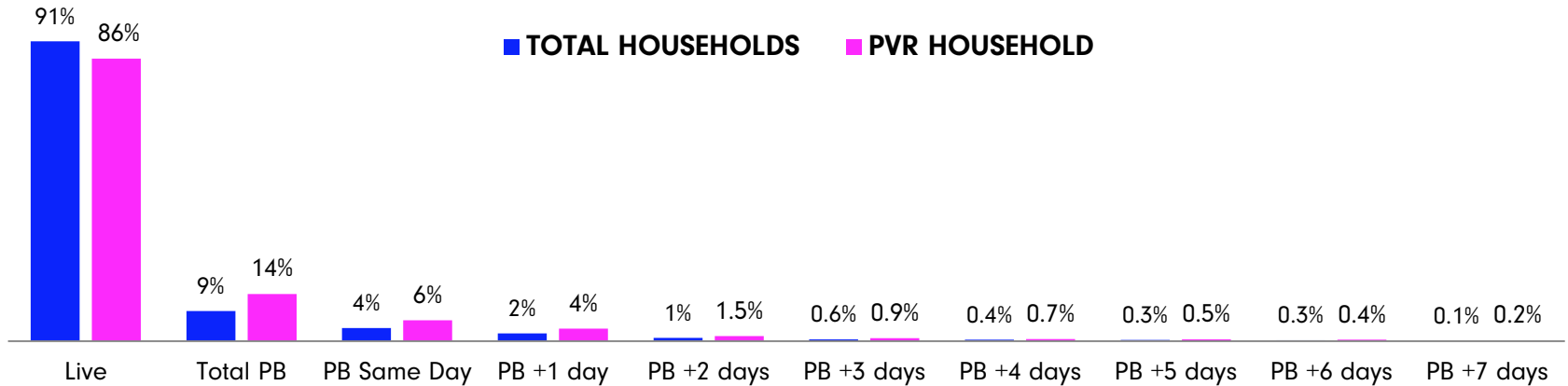


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PVR USAGE

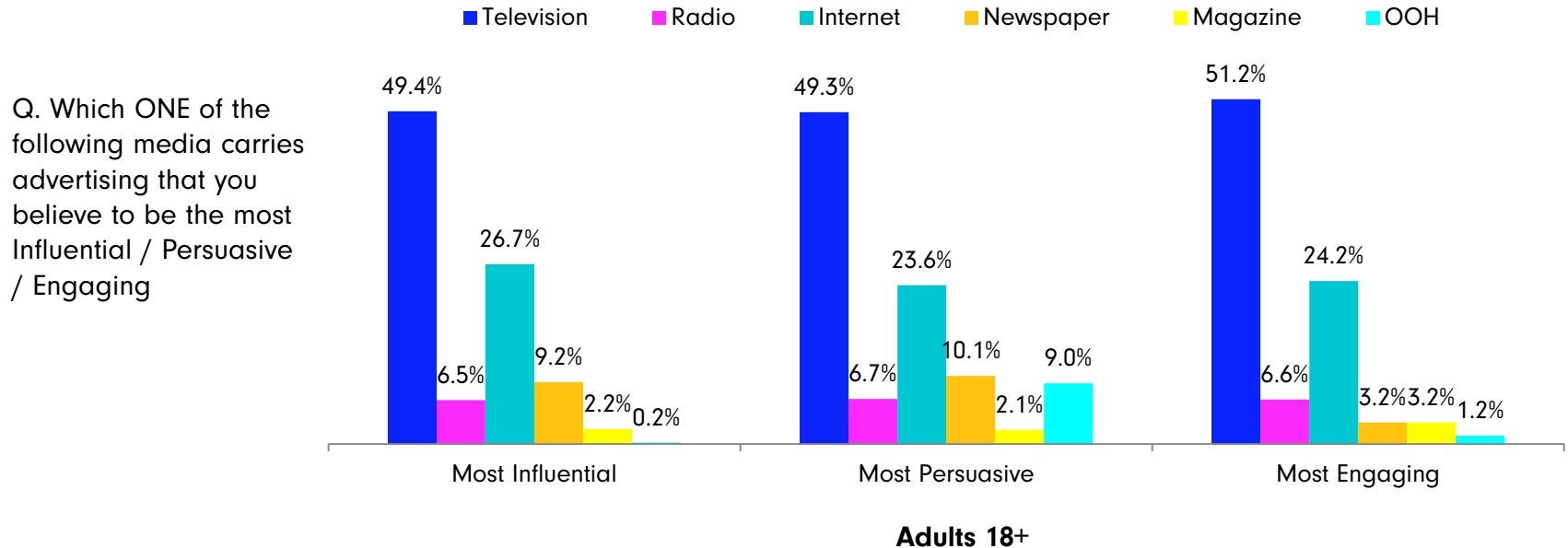
In PVR households the majority of TV viewing occurred live with the bulk of PVR content viewed within 24 hours, on par with Fall 2014.



Live + 1 day = 96% of PVR households

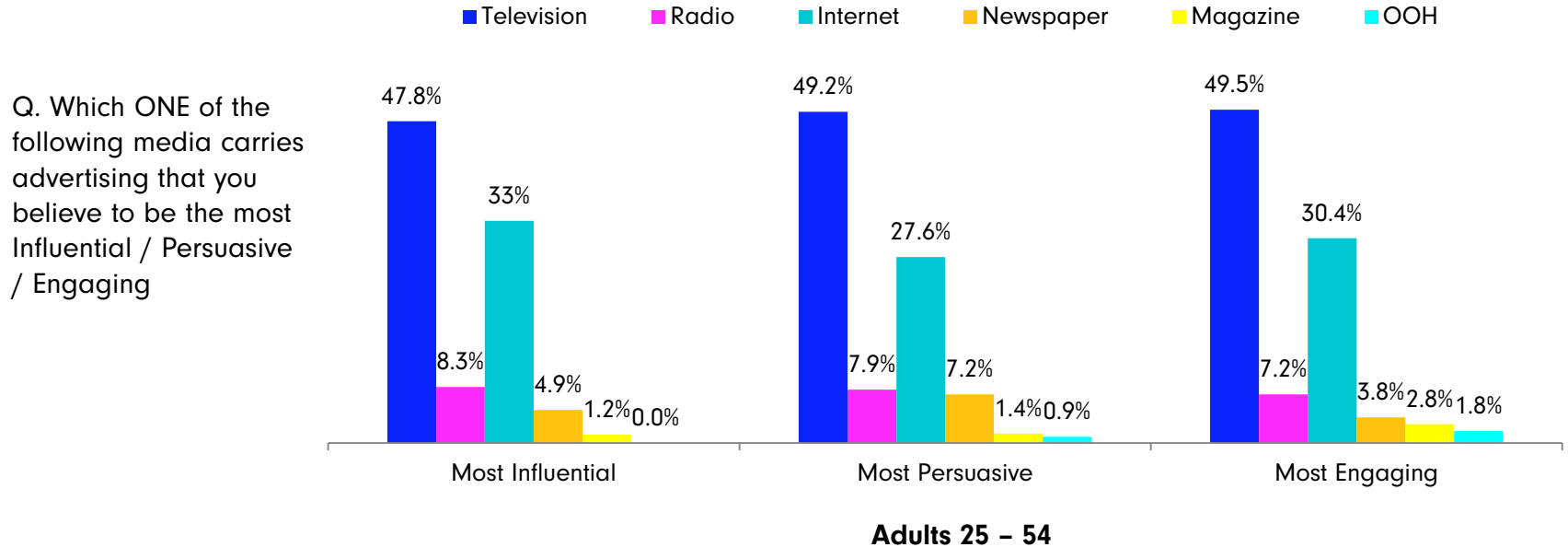
ATTITUDES ABOUT ADVERTISING

Fall omniVU survey results show that Television continues to be rated the most Influential, most Persuasive and most Engaging medium.



ATTITUDES ABOUT ADVERTISING

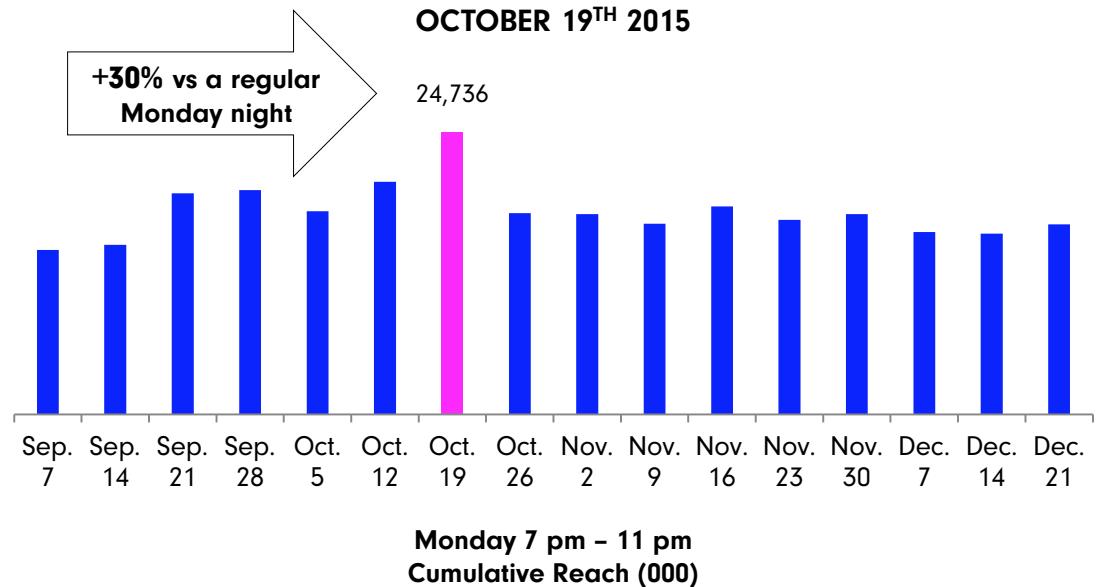
Key demo Adult 25-54 agree: TV is the most Influential, most Persuasive and most Engaging medium.



ON ONE DAY, TWO TELEVISED EVENTS REACHED 25 MILLION CANADIANS

Over 70% of Canadians tuned in for:

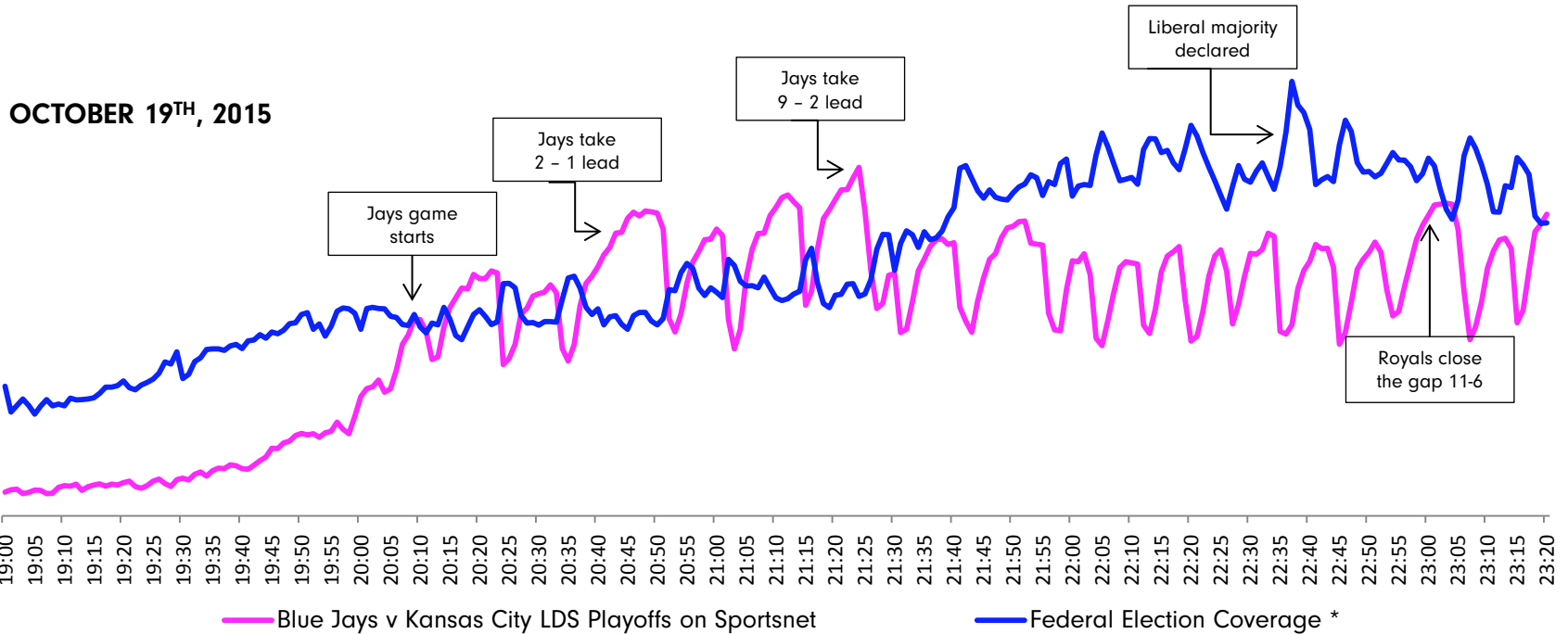
- **Liberal Party victory** in the Canadian federal election.
- and/or
- **Blue Jays victory** in game 3 of the American League championship series.



Source: Numeris Total Canada; All Locations; Consolidated; A2, Cumulative Reach
 * Sportsnet + CBC + CTV + CBC News Network + CTV News Channel + CP24 +RDS + TVA +SRC (Monday 7pm – 11 pm)

2 KEY EVENTS GO HEAD-TO-HEAD

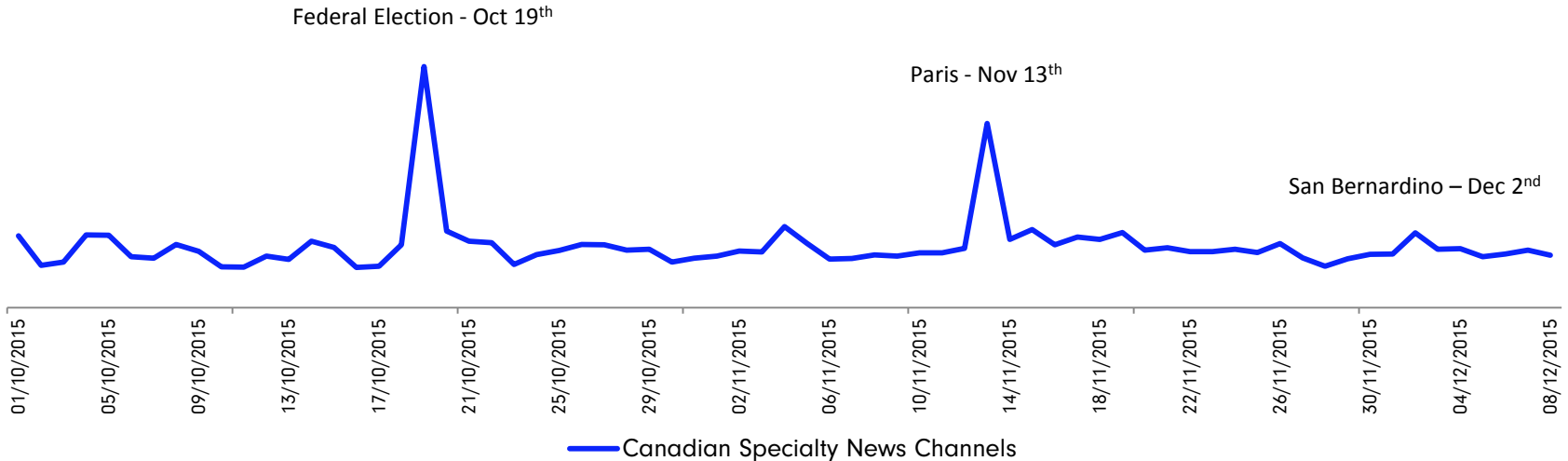
BLUE JAYS PLAYOFFS v THE FEDERAL ELECTION, a minute-by-minute breakdown



Source: Numeris Total Canada; All Locations; Consolidated; A2, 7pm -11:20pm
 * CBC + CTV + CBC News Network + CTV News Channel + CP24

VIEWERS FLOCK TO SPECIALTY NEWS CHANNELS FOR MAJOR EVENTS

CANADIAN NEWS SPECIALTY
FALL 2015 PRIME TIME DAILY TRENDING A2+ AMA(000)



Source: Numeris Total Canada; All Locations; Consolidated, A2+, 7pm-11pm
*CTV News Channel + CBC News Network + CP24 + RDI

TV HIGHLIGHTS FALL 2015 – MILLENNIALS

Millennial's TV choices are as similar as they are **different.**

A18-34

TOP 10 REGULARLY SCHEDULED PROGRAMS*

Program	Network
Big Bang Theory	CTV
Big Bang Theory	CTV
Grey's Anatomy	CTV
The Flash	CTV
Amazing Race Canada 3	CTV
Gotham	CTV
Survivor: Cambodia	Global
Marvel Agents of Shield	CTV
MLB LCS Playoffs	Sportsnet
How To Get Away With Murder	CTV

A35-54

TOP 10 REGULARLY SCHEDULE PROGRAMS*

Program	Network
Big Bang Theory	CTV
Big Bang Theory	CTV
Amazing Race Canada 3	CTV
Survivor: Cambodia	CTV
Quantico	CTV
Marvel Agents of Shield	CTV
MLB LCS Playoffs	Global
The Flash	CTV
Blindspot	Sportsnet
Grey's Anatomy	CTV



TV HIGHLIGHTS FALL 2015 – NEW SHOWS

Quantico and Blindspot are the Top 2 new Fall shows.

IND.2+	
TOP 10 PROGRAMS*	
Program	Network
Quantico	CTV
Blindspot	CTV
Code Black	CTV
Supergirl	GLOBAL
Limitless	GLOBAL
Heroes Reborn	GLOBAL
Blood & Oil	CTV
Chicago Med	GLOBAL
Best Time Ever	CTV
Life In Pieces	CITYTV

A25-54	
TOP 10 PROGRAMS*	
Program	Network
Quantico	CTV
Blindspot	CTV
Supergirl	GLOBAL
Limitless	GLOBAL
Code Black	CTV
Heroes Reborn	GLOBAL
Best Time Ever	CTV
Chicago Med	CITYTV
The Muppets	GLOBAL
Life In Pieces	CITYTV

A18-34	
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Program	Network
Quantico	CTV
Blindspot	CTV
Supergirl	GLOBAL
Limitless	GLOBAL
Code Black	CTV
Heroes Reborn	GLOBAL
Best Time Ever	CTV
Chicago Med	GLOBAL
The Muppets	CITYTV
Life In Pieces	CITYTV

TV HIGHLIGHTS FALL 2015 – SPECIALTY

Top 10 rated English Specialty programming for Fall 2015.

IND.2+	
TOP 10 REGULARLY SCHEDULED PROGRAMS*	
Program	Network
MLB LCS Playoffs	SPORTSNET
Jays Central Post	SPORTSNET
MLB Divisional Playoffs	SPORTSNET
Baseball: Blue Jays	SPORTSNET
CFL Playoffs	TSN
MLB WS Playoffs	SPORTSNET
Jays Central Playoff	SPORTSNET
Gold Rush	DISCOVERY
Curse of Oak Island	HISTORY
NHL Hockey-Cdn	SPORTSNET

A25-54	
TOP 10 REGULARLY SCHEDULED PROGRAMS*	
Program	Network
MLB LCS Playoffs	SPORTSNET
Jays Central Post	SPORTSNET
MLB Divisional Playoffs	SPORTSNET
Baseball: Blue Jays	SPORTSNET
Gold Rush	DISCOVERY
Doctor Who	SPACE
Cdn's Worst Driver	DISCOVERY
CFL Playoffs	TSN
Curse of Oak Island	HISTORY
Jays Central Playoff	SPORTSNET

A18-34	
TOP 10 REGULARLY SCHEDULED PROGRAMS*	
Program	Network
MLB LCS Playoffs	SPORTSNET
Jays Central Post	SPORTSNET
MLB Divisional Playoffs	SPORTSNET
Baseball: Blue Jays	SPORTSNET
Gold Rush	DISCOVERY
Doctor Who	SPACE
Cdn's Worst Driver	DISCOVERY
Curse of Oak Island	HISTORY
CFL Playoffs	TSN
Jays Central Playoff	SPORTSNET

TV HIGHLIGHTS FALL 2015 – SPECIALTY

Top 10 rated English Specialty Fall non-sports programming for Fall 2015.

IND.2+	
TOP 10 REGULARLY SCHEDULED PROGRAMS*	
Program	Network
Gold Rush	DISCOVERY
The Curse of Oak Island	HISTORY
Doctor Who	SPACE
Cdn's Worst Driver	DISCOVERY
Highway Thru Hell	DISCOVERY
Hunting Hitler	HISTORY
Discovery Presents	DISCOVERY
Dancing With The Stars	BRAVO
Mountain Men	HISTORY
The Librarians 2	SPACE

A25-54	
TOP 10 REGULARLY SCHEDULED PROGRAMS*	
Program	Network
Gold Rush	DISCOVERY
Doctor Who	SPACE
Canada's Worst Driver	DISCOVERY
Curse of Oak Island	HISTORY
Highway Thru Hell	DISCOVERY
Hunting Hitler	HISTORY
Face Off	SPACE
Discovery Presents	DISCOVERY
The Librarians 2	SPACE
Halloween Wars	FOOD NETWORK

A18-34	
TOP 10 REGULARLY SCHEDULED PROGRAMS*	
Program	Network
Gold Rush	DISCOVERY
Doctor Who	SPACE
Canada's Worst Driver	DISCOVERY
Curse of Oak Island	HISTORY
Highway Thru Hell	DISCOVERY
Face Off	SPACE
Kardashians	E!
Kardashians	E!
Hunting Hitler	HISTORY
Discovery Presents	DISCOVERY

Source: Numeris Total Canada; All Locations; Consolidated; Fall 2015 (Weeks 2-16).

* Programs airing 3 or more times during Fall 2015.



**FOR MORE INFORMATION,
PLEASE VISIT [THINKTV.CA](http://thinktv.ca)**