Spring 2015: Top 5 Sneak Peek
A Brief Review of MTM’s Latest Findings

Issued: June 25, 2015
Introduction

+ The Spring 2015 MTM is out of the field, and it’s time to review the latest data. This spring, clients will find new questions on everything from Ultra HD to the latest entrants into the OTT market (Shomi and Crave TV) to YouTube activities and much more.

+ This report provides a brief overview of some of the MTM’s newest findings from the Spring 2015 data and highlights some of what’s to come from the upcoming season of reports.

+ This year, the Media Technology Monitor (MTM)* incorporated a mixed-methodology approach which included a phone survey and a follow-up survey online. The data from this report comes primarily from the online portion of the survey unless otherwise noted.**

*See the appendix for further information on our survey methodology and permissible uses.
**Data in this report coming from the phone portion of the survey will be identified with this symbol +.
Top 5 Sneak Peak

5. Ultra HD
4. YouTube Activities
3. Apple Watch
2. The Fall of Analog Cable
1. The Rebirth of the Podcast
Ultra HD
82% of Canadians currently own a regular HDTV…

HDTV Owners
Canadians, 18+
%
82

HDTV Owners

Top 5 Sneak Peek – MTM Spring 2015

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...But when they upgrade to a new TV, some are starting to learn about Ultra HD as an option.

Also known as 4K, Ultra HD is still a relatively new term to many Canadians. Fewer than half who purchased a TV in the past year, are even familiar with this term.

The high cost of these TV sets may slow adoption for now.

Familiar with the Term Ultra HD+
Canadians, 18+

<table>
<thead>
<tr>
<th></th>
<th>Bought a TV in the Past Year</th>
<th>Didn't Buy a TV in the Past Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>45</td>
<td>38</td>
</tr>
</tbody>
</table>

+ Phone questionnaire
Want to know more or interested in subscribing?
Email: mtm.otm@radio-canada.ca
Phone: 1-855-898-4999

Top 5 Sneak Peek – MTM Spring 2015

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YouTube Activities
7 in 10 Canadians have used YouTube in the past month

Used YouTube in the Past Month
Canadians, 18+
%

72%

Past Month YouTube User

72% of Canadians have watched video or listened to audio from the YouTube website in the past month

+ Phone questionnaire
YouTube is more than just Gangam Style and crazy cat videos – 6 in 10 are using it to learn how to do something

Watched a “How To” Video on YouTube
Past Month YouTube Users, Canadians, 18+

63%
Check out the extended YouTube section in the Online Questionnaire and click here to subscribe to our email distribution list to be notified when our YouTube report is released.
Apple Watch
Half of all Canadians currently own at least one Apple product*

* This year’s MTM includes the ownership of iPhones, iPads and Apple TV. It did not ask respondents about Mac computers

About 7 in 10 Apple product owners have an iPhone

Top 5 Sneak Peek – MTM Spring 2015
Awareness of the Apple Watch was high among Apple product owners

Heard of the Apple Watch Prior to Launch
Canadian Apple Product Owners*, 18+

%  
71

The Apple Watch launched on April 24\textsuperscript{th} in Canada

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A testament to their marketing, ½ of all non-Apple Canadians had heard of the watch as well!

* This year’s MTM includes the ownership of iPhones, iPads and Apple TV. It did not ask respondents about Mac computers
Stay tuned to learn more about our new Viewpoints in Technology feature where we interview industry leaders about their field of interest. Topics such as wearables, the gaming industry, personalized music services and many more will be covered.
The Disappearance of Analog Cable
Over the last few years the majority of cable TV service providers have worked to transition analog customers to their digital offerings.

“In 2015, we expect to complete the transitioning of [our analog] customers…to all digital services.”
(Rogers Annual Report, 2014)

Cogeco stopped offering analog to new customers in 2012 and the remaining customers will be transitioned within the next two years (Cogeco Annual Report, 2014)

The customer base for analog cable decreased…by 67,400 over a 12-month period, partly as a result of customer migration to illico Digital TV.”
(Quebecor, Q1 2015 Report)

“With the substantial completion of the Digital Network Upgrade, only legacy basic cable service is delivered via analog signals.”
(Shaw Annual Report, 2014)
These transition efforts are evidenced in the sharp decline of analog cable this spring.

Penetration of Analog Cable*  
Canadian Cable Subscribers, 18+  
%  

Analog cable has dropped to a third of its size from just three years ago.

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Fall 2012</td>
<td>21%</td>
</tr>
<tr>
<td>Spring 2013</td>
<td>21%</td>
</tr>
<tr>
<td>Fall 2013</td>
<td>19%</td>
</tr>
<tr>
<td>Spring 2014</td>
<td>21%</td>
</tr>
<tr>
<td>Fall 2014</td>
<td>17%</td>
</tr>
<tr>
<td>Spring 2015</td>
<td>7%</td>
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</tbody>
</table>

* Phone questionnaire
Check out the TV Distribution Report for more information and make sure to follow us on Twitter @MTMOTM or click here.
The Rebirth of the Podcast
Nearly two-thirds of all Canadians listened to some form of online audio in the past month.

Listed to Online Audio+
Canadians, 18+
%

64

Online Audio Listener*

* Includes streaming an AM/FM radio station, listening to music on YouTube, listening to a personalized audio service, podcasting, or using any other type of online audio in the past month.
Podcasting has been around for a decade but has made a comeback in the past couple of years.

From a low of just 11% in 2012, podcasting has more than doubled in the past 2 years.

Listen to a Podcast*
Canadians, 18+
%

**Past month use**

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<th></th>
<th>Fall 2012</th>
<th>Spring 2015</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>11</td>
<td>23</td>
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*Podcasting has been around for a decade but has made a comeback in the past couple of years.

From a low of just 11% in 2012, podcasting has more than doubled in the past 2 years.

*Past month use*
Check out the extended Internet Audio section in the Online Questionnaire and click here to subscribe to our email distribution list to be notified when new reports are released.
Appendix 1

Survey Methodology and Permissible Uses
Methodology

The Media Technology Monitor is the highest quality media survey in Canada. It employs large sample sizes and achieves response rates far exceeding industry standards. Moreover, it includes Canadians with landline telephone service and those who rely solely on a cell phone. This blended sampling approach can reach 99% of Canadians. The MTM is a product of CBC/Radio-Canada Research and Analysis.

Of the telephone respondents, 1592 completed a follow-up online questionnaire. The transition rate among online respondents from telephone to online is over 40%.

The MTM measures Canadians’ media technology adoption and use at two points in time. In the Fall, telephone interviews are conducted with 8,000 Canadians (4,000 Anglophones and 4,000 Francophones). To monitor changes in the media landscape over the year, a telephone survey with an independent sample of 4,000 Canadians (2,000 Anglophones and 2,000 Francophones) is conducted in the Spring.

The results reported here are based on Spring 2015 survey of 2041 Canadian respondents (including 671 cell-phone only) across all regions of Canada*. The response rate is over 27%.

* Excludes the Territories.
Methodology and Permissible Uses (cont’d)

+ The Anglophone interviews were conducted by Forum Research Inc. from March 18 to April 24, 2015 and the Francophone interviews were conducted by Adhoc Research from March 26 to May 5, 2015.

+ Results based on the total sample of 4041 Canadians are accurate within plus or minus 1.5% percentage points 19 times out of 20.

Permissible Uses

+ This report is prepared for the exclusive use of your organization. Distribution outside your organization is prohibited without prior approval.

+ Extracts from, or references to, the data in speeches, reports or presentations given by members of your organization can be used, provided MTM 2014-2015 is clearly cited as the source of such extracts or references.
Please visit the MTM portal to access other MTM reports, data summary tables, and our interactive data-analysis tool.