

SCC | STUDY OF THE CANADIAN CONSUMER

# Cross-Media Update

SPRING 2024





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# SCC | Study of the Canadian Consumer

## KEY CHARACTERISTICS

**50,000+**

Annual Respondents

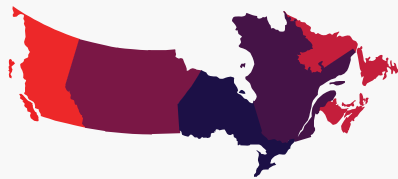
**60,000+**

Variables

**4,000+**

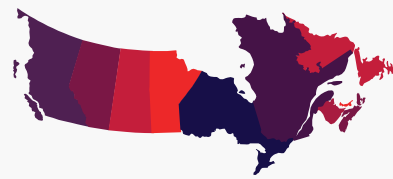
Brands

## REGIONS AND MARKETS



**5**

Regions



**10**

Provinces



**38**

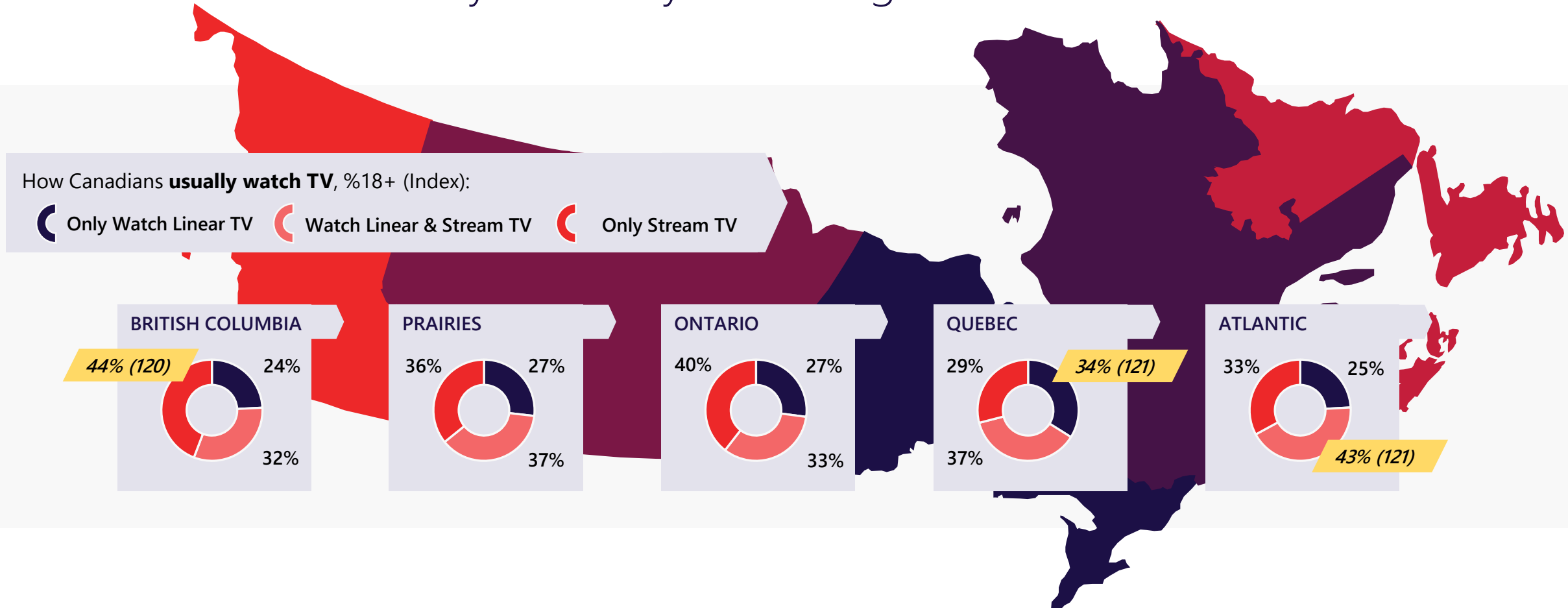
Markets



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# Television

1 in 4 Canadians only watch TV live as broadcast while over 1 in 3 only watch by streaming.

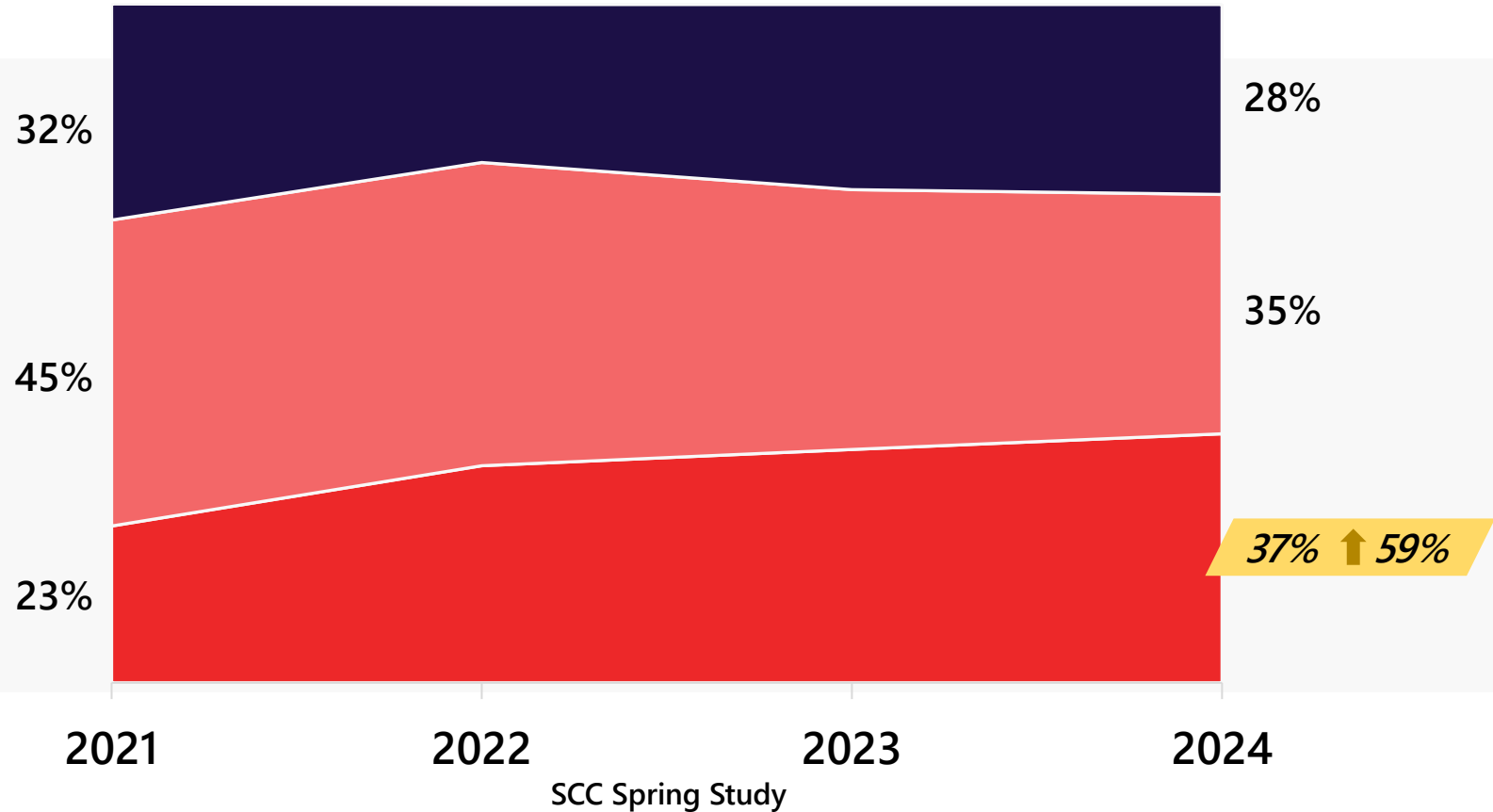


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The proportion of Canadians that only watch TV by streaming has increased by 59% over the past 3 years.

How Canadians **usually watch TV** from Spring 2021 to 2024 (%18+):

- Only Watch Linear TV
- Watch Linear & Stream TV
- Only Stream TV

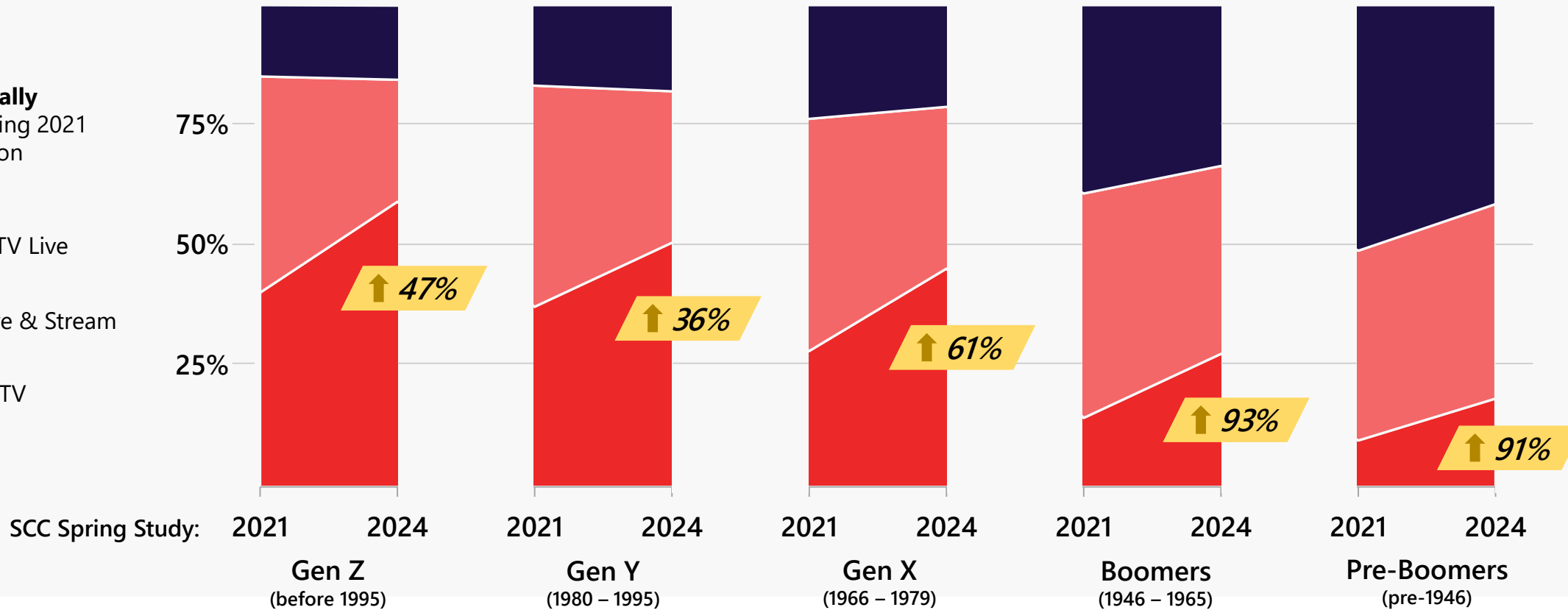


Source: Vividata's SCC | Study of the Canadian Consumer Spring 2021, 2022 and Spring 2024 Base: Total Canada 18+, Watch TV by any method  
Only Watch Linear TV: Selected "Usually Watch TV" live as it is broadcast or a channel's catch-up/on-demand service AND NOT by a subscription services (e.g. Netflix, Crave) or online/streaming, or other.  
Only Stream TV: Selected "Usually Watch TV" by subscription services (e.g. Netflix, Crave) or online/streaming, or other AND NOT live as it is broadcast or a channel's catch-up/on-demand service  
Watch Linear & Stream TV: Selected "Usually Watch TV" live as it is broadcast or via a channel's catch-up/on-demand service AND subscription services (e.g. Netflix, Crave) or online/streaming, or other.

# Older Canadians are becoming more comfortable with streaming TV compared to 2021.

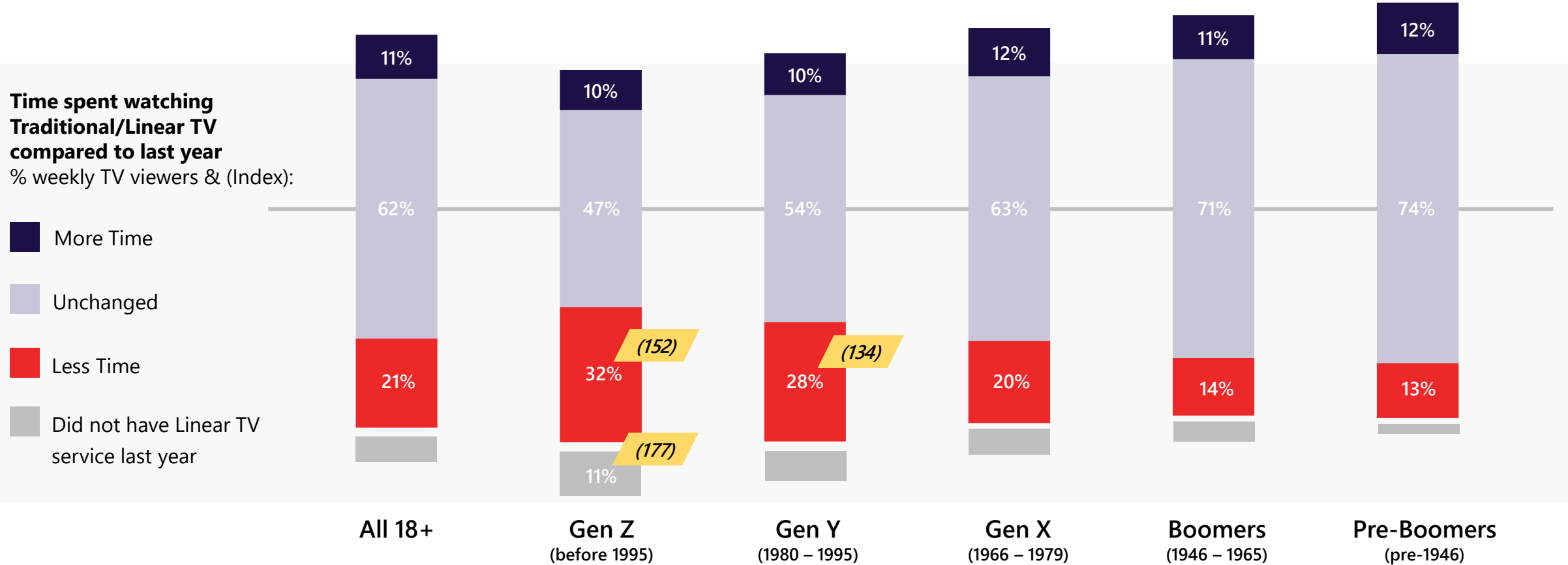
How Canadians **usually watch TV**, from Spring 2021 to 2024 by generation (% comp. 18+):

- Only Watch TV Live
- Watch TV Live & Stream
- Only Stream TV



Source: Vividata's SCC | Study of the Canadian Consumer Spring 2021 & 2024 **Base:** Total Canada 18+, Watch TV by any method  
**Only Watch Linear TV:** Selected "Usually Watch TV" live as it is broadcast or a channel's catch-up/on-demand service AND NOT by a subscription services (e.g. Netflix, Crave) or online/streaming, or other.  
**Only Stream TV:** Selected "Usually Watch TV" by subscription services (e.g. Netflix, Crave) or online/streaming, or other AND NOT live as it is broadcast or a channel's catch-up/on-demand service  
**Watch Linear & Stream TV:** Selected "Usually Watch TV" live as it is broadcast or via a channel's catch-up/on-demand service AND subscription services (e.g. Netflix, Crave) or online/streaming, or other.

# 1 in 5 Canadian TV viewers watched less linear TV than they did last year.



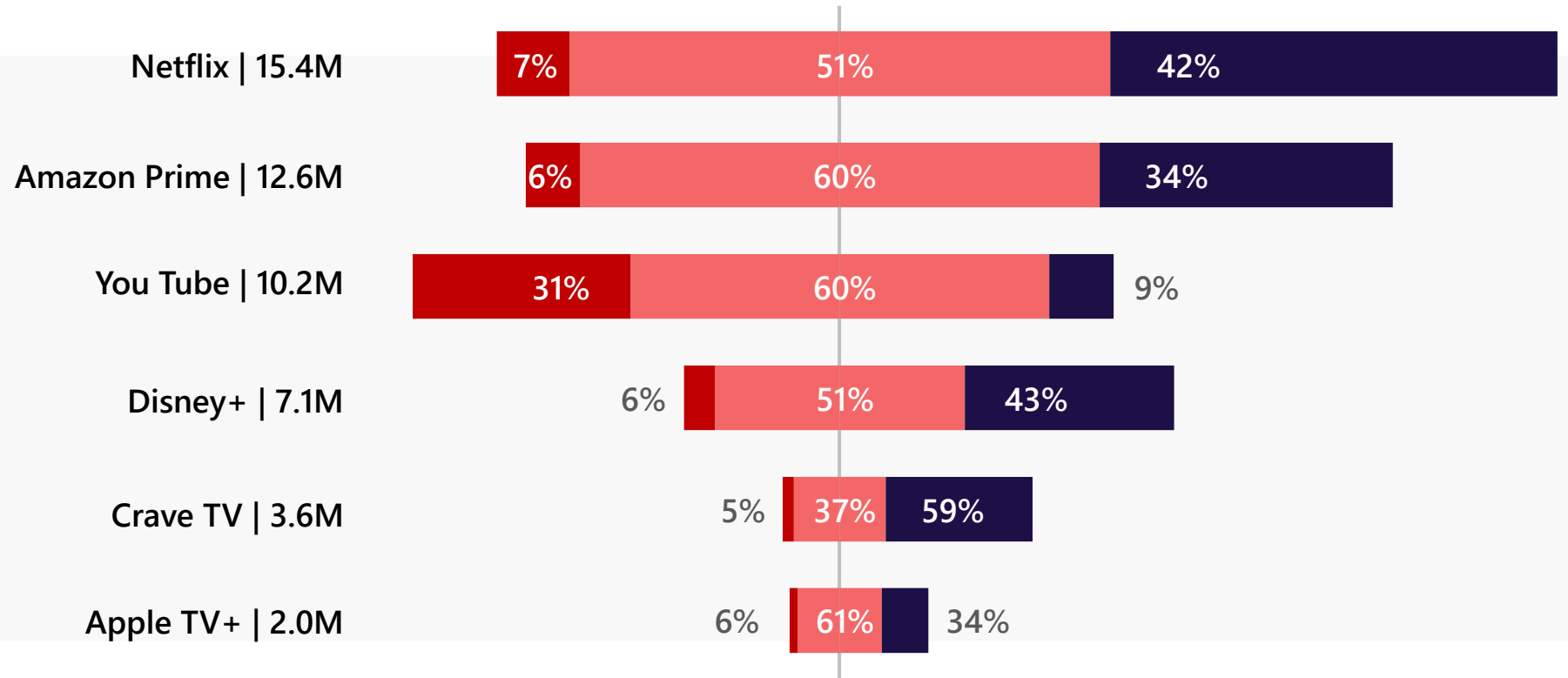


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15.4 Million Canadian adults watch Netflix with 93% viewing on a large screen.

TV streamers by platform, by how they typically watch the platform (%18+):

- Only on Small Screen
- On Small and Large Screen
- Only on Large Screen



Source: Vividata's SCC | Study of the Canadian Consumer Spring 2024  
Base: Total Canada 18+

Small Screen: Watch on Computer/Laptop, Smartphone, or Tablet  
Large Screen: Watch on Connected/Smart TV, TV set (excluding Connected/Smart TV), Game Console, Set-Top Box, or Other

# Top Paid and Free Streaming Services Watched in Canada

Top **Paid** Streaming Services Watched in an Average Week, (% 18+)

| English Canada | % reach |
|----------------|---------|
| Netflix        | 42%     |
| Amazon Prime   | 32%     |
| Disney+        | 20%     |
| Crave TV       | 10%     |
| Bell Fibe TV   | 7%      |

French Canada

| French Canada | % reach |
|---------------|---------|
| Netflix       | 33%     |
| Amazon Prime  | 20%     |
| Disney+       | 10%     |
| Helix         | 7%      |
| Bell Fibe TV  | 6%      |

Top **Free** Streaming Services Watched in an Average Week, (% 18+)

| English Canada | % reach |
|----------------|---------|
| YouTube        | 29%     |
| CTV            | 5%      |
| CBC Gem        | 4%      |
| Tubi           | 4%      |
| Roku           | 4%      |

French Canada

| French Canada | % reach |
|---------------|---------|
| YouTube       | 26%     |
| Noovo         | 10%     |
| Tou.TV        | 6%      |
| CTV           | 2%      |
| Tubi          | 2%      |

# Top TV Channels Watched in Canada

Top TV Channels  
Watched in an Average  
Week, (% 18+):

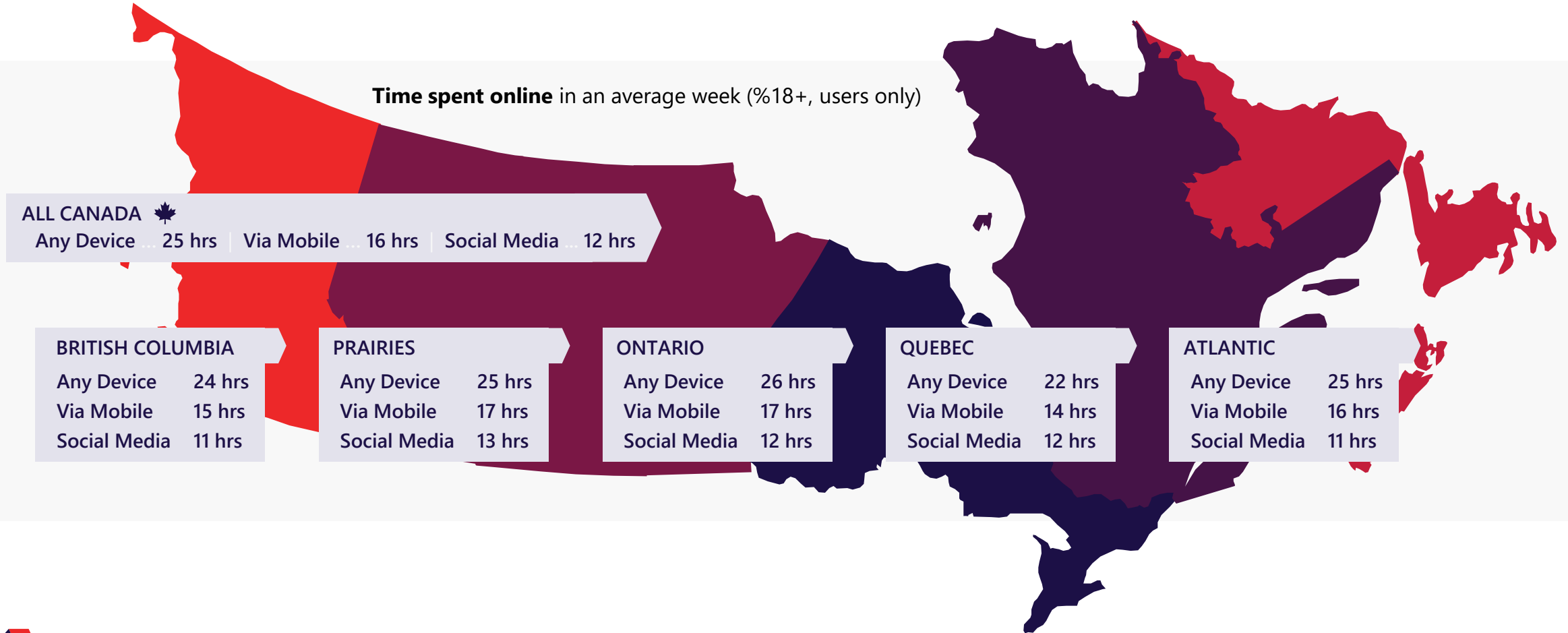
| English Canada      | % reach | French Canada      | % reach |
|---------------------|---------|--------------------|---------|
| CTV                 | 27%     | TVA                | 56%     |
| Global              | 26%     | ICI Radio-Canada   | 42%     |
| CBC                 | 25%     | Noovo              | 35%     |
| Sportsnet           | 21%     | LCN                | 29%     |
| CityTV              | 20%     | Télé-Québec        | 24%     |
| TSN                 | 18%     | ICI Radio          | 21%     |
| The Weather Network | 18%     | MétéoMédia         | 17%     |
| CBC News Network    | 14%     | Canal D            | 17%     |
| HGTV                | 13%     | RDS/RDS 2/RDS Info | 16%     |
| Food Network Canada | 12%     | addikTV            | 14%     |



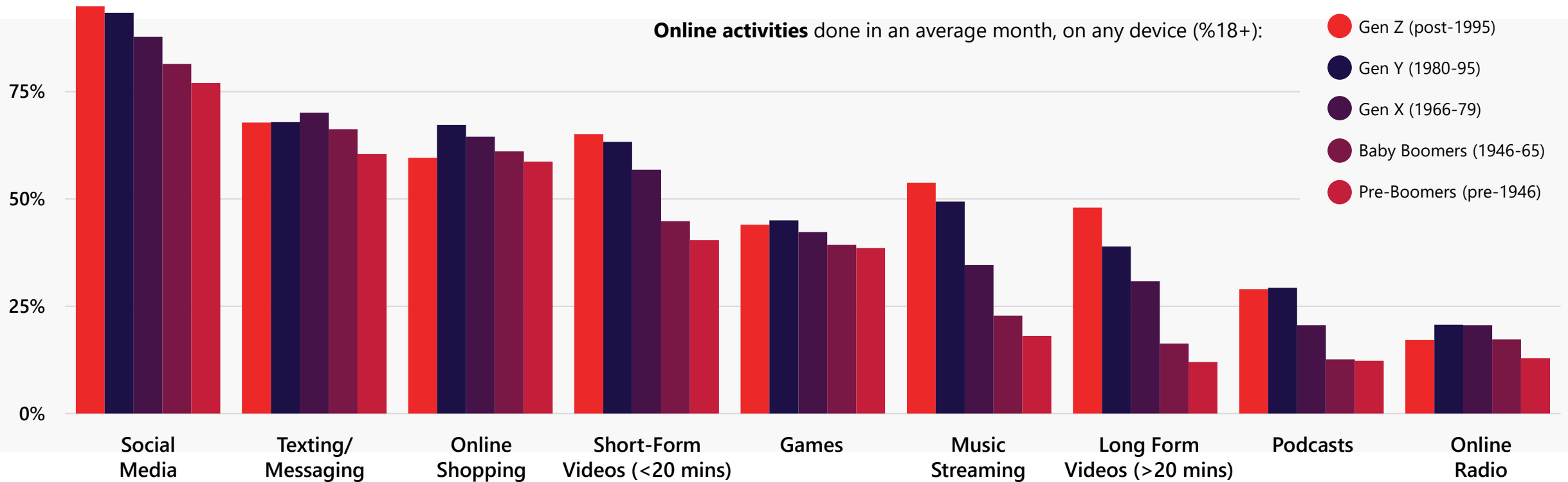
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# Internet & Social Media

Canadians spend an average of **25 hours** a week online, with those in Ontario being the most active.



Gen Z and Y are the most likely to participate in nearly all online activities, while Gen Y is the most likely to shop.



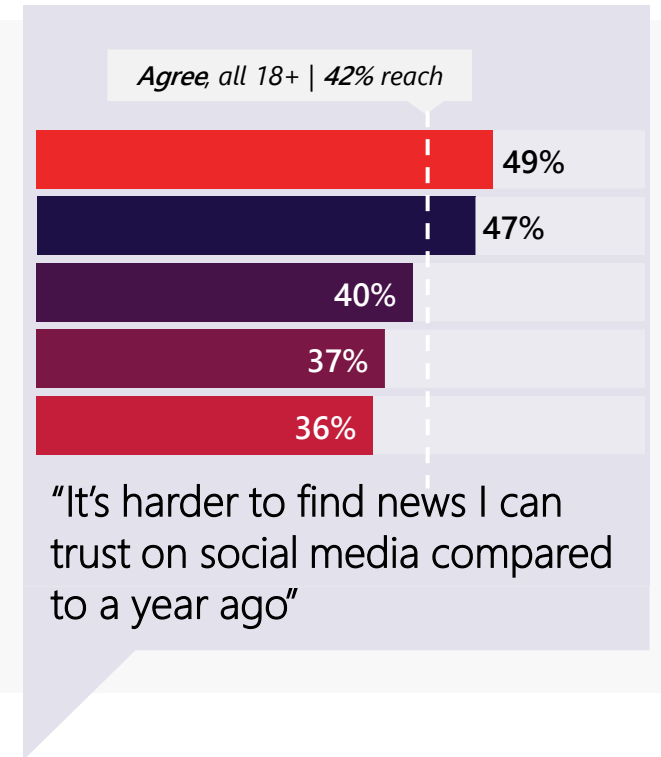
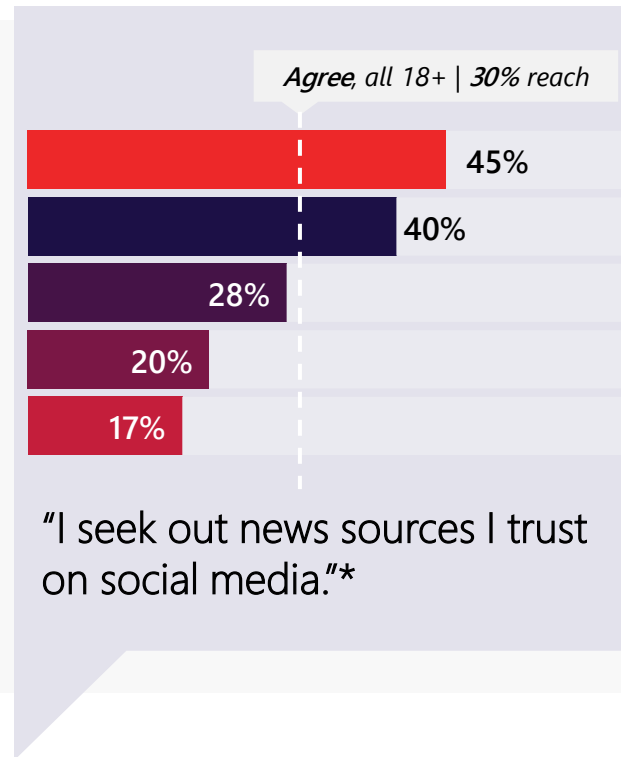
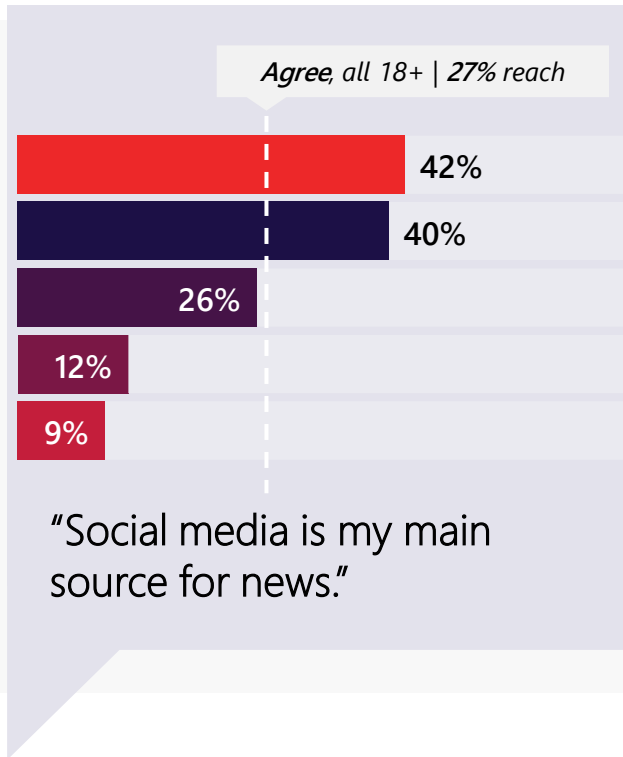
41%

of Gen Z and Y Canadians  
use social media as their  
main source for news.

While over **2 in 5** younger Canadians seek out news on social media, many see trustworthy sources as harder to find.

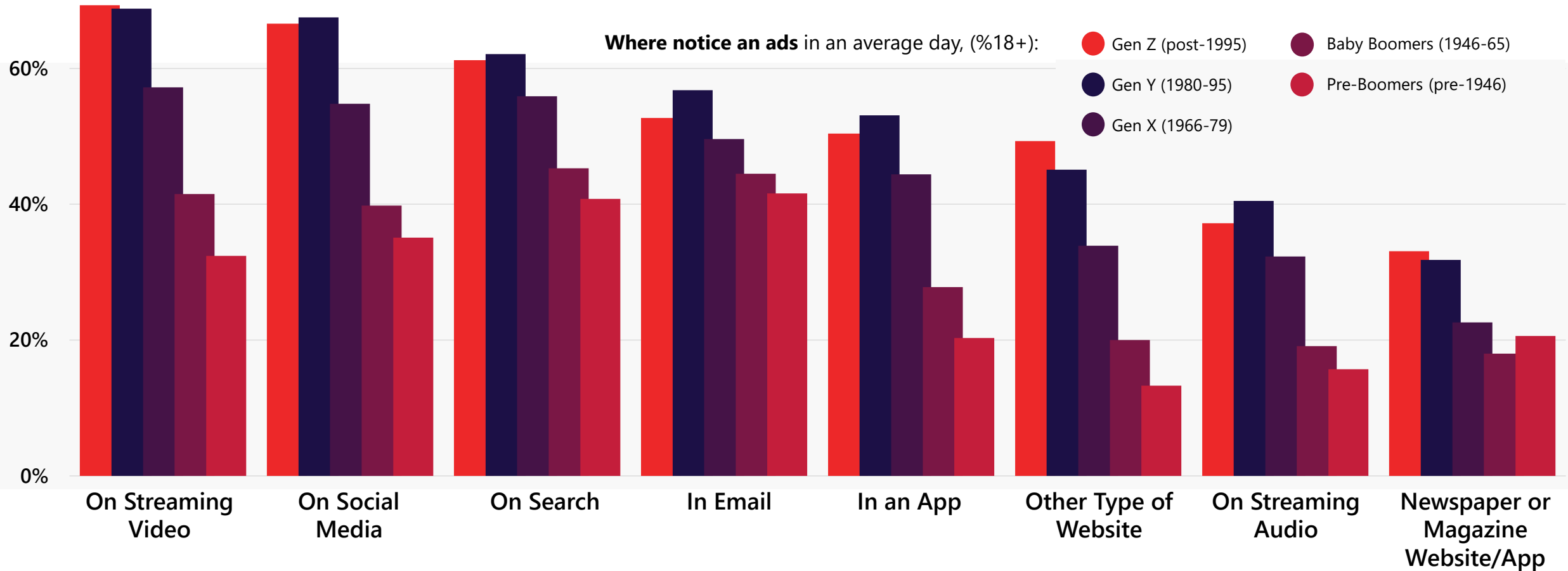
% agree, 18+

- Gen Z (post-1995)
- Gen Y (1980-95)
- Gen X (1966-79)
- Baby Boomers (1946-65)
- Pre-Boomers (pre-1946)





Ads on streaming video and social media reach up to 2 in 3 younger Canadians.

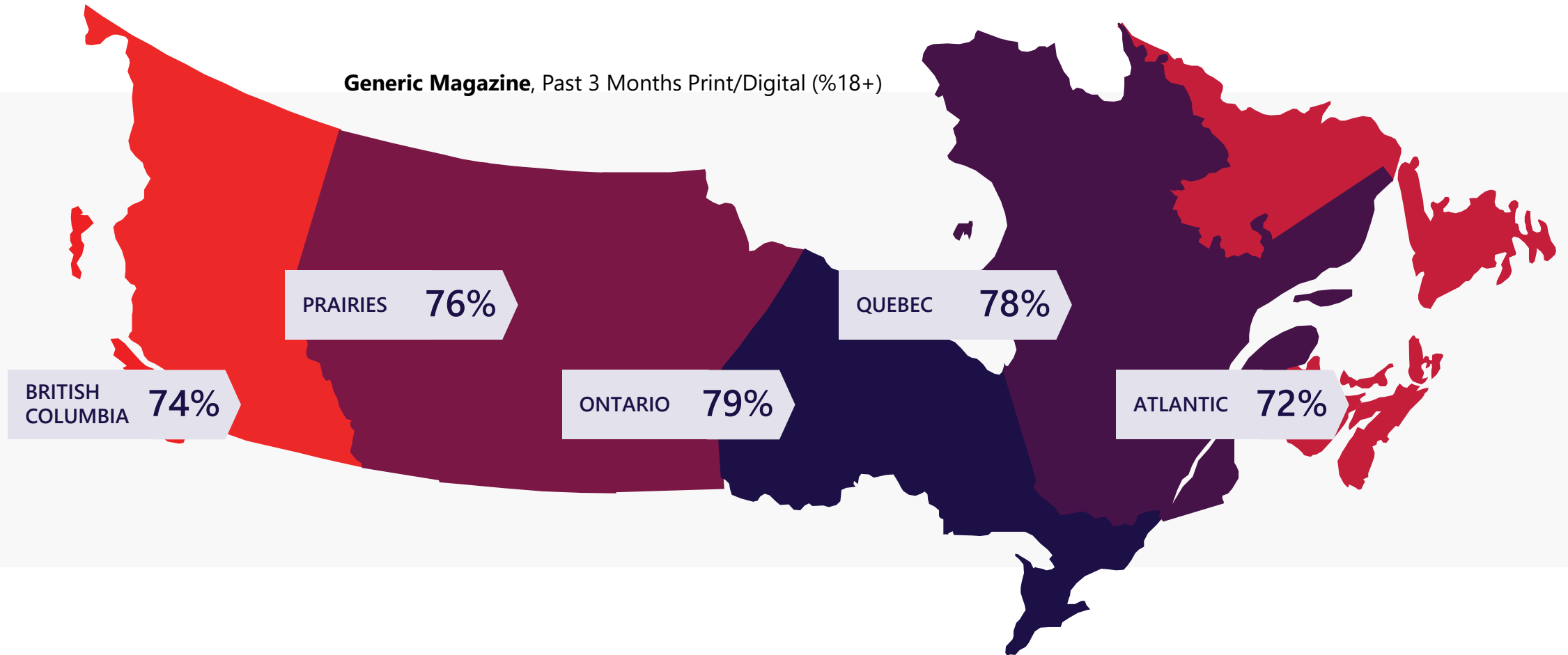




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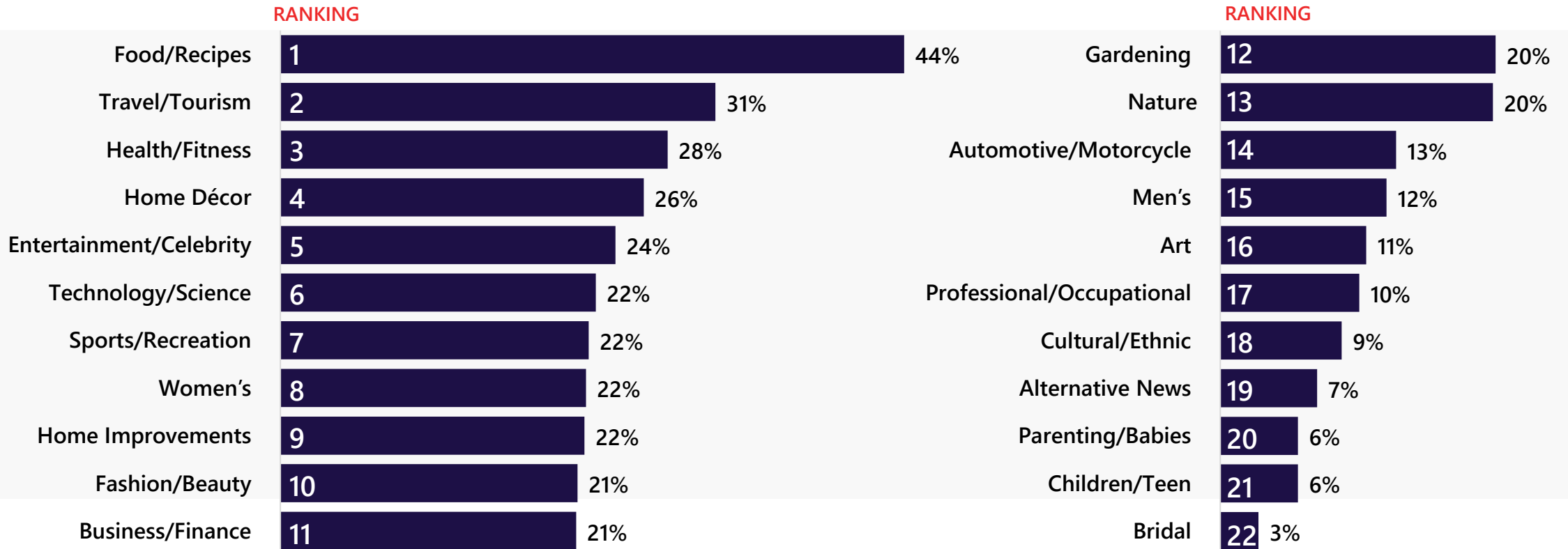
# Magazines

Magazines reach over 3 in 4 adults across Canada.



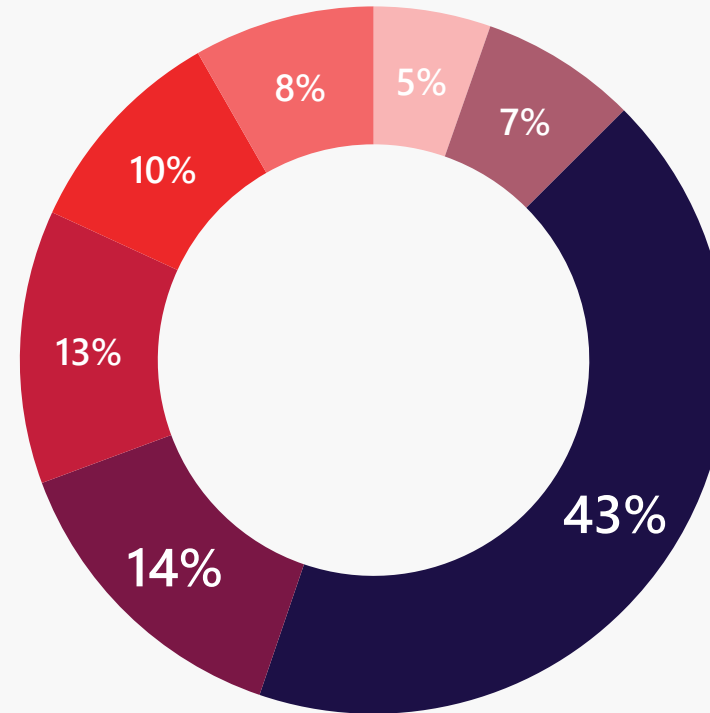
# Food, travel, & health magazines are most popular.

Magazine Rank by Type, Print/Digital (% reach, Monthly Magazine Readers, 18+)



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While **43%** of magazine readers **only read print**, **14%** do so in **combination** with more than one digital device.

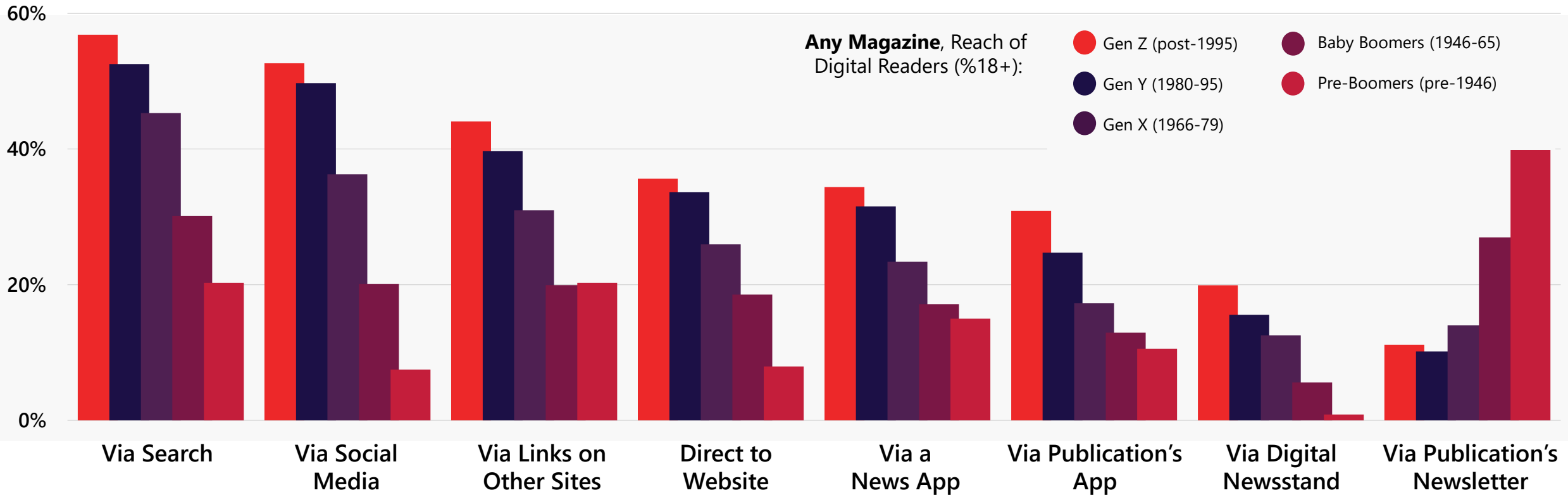


Any magazine, composition of print/digital AIR (18+)

- Computer Only
- Print & Computer Only
- Print Only
- Print & Computer & Mobile
- Print & Mobile Only
- Mobile Only
- Computer & Mobile Only

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Gen X, Y & Z mainly access digital magazine content indirectly, via **search** and **social media**.



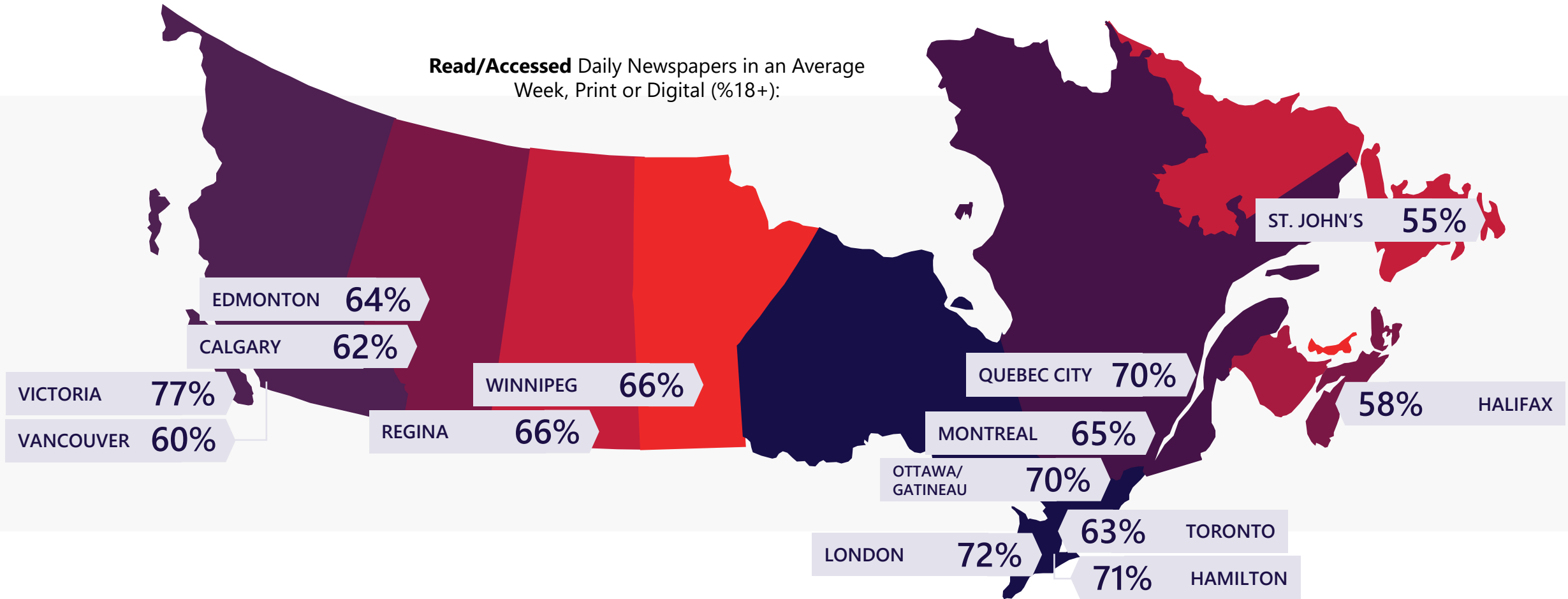


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# Newspapers

Daily newspapers reach nearly 2 in 3 adults.

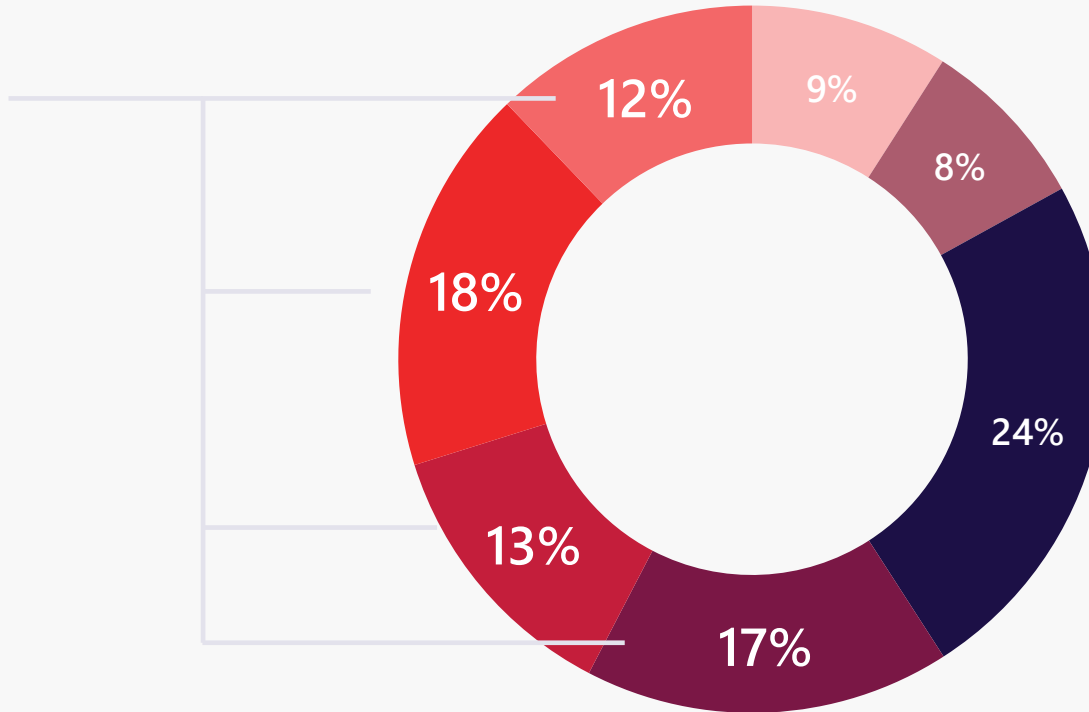
**Read/Accessed** Daily Newspapers in an Average Week, Print or Digital (%18+):





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60% of newspaper readers access newspaper content on a mobile device.



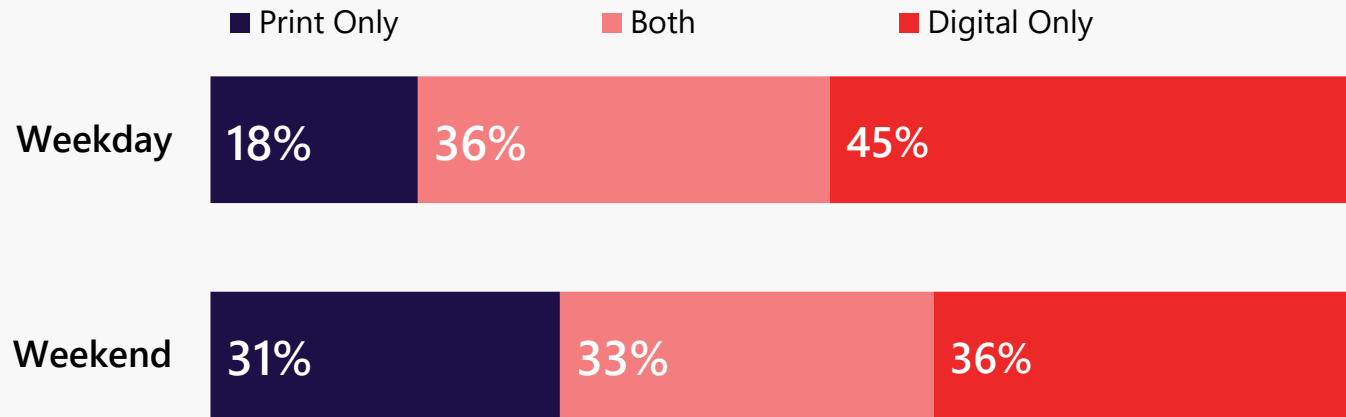
Any Newspaper, **Composition** of Weekly Print/Digital Readers (Major Markets, 18+)

- Computer Only
- Print & Computer Only
- Print Only
- Print & Computer & Mobile
- Print & Mobile Only
- Mobile Only
- Computer & Mobile Only

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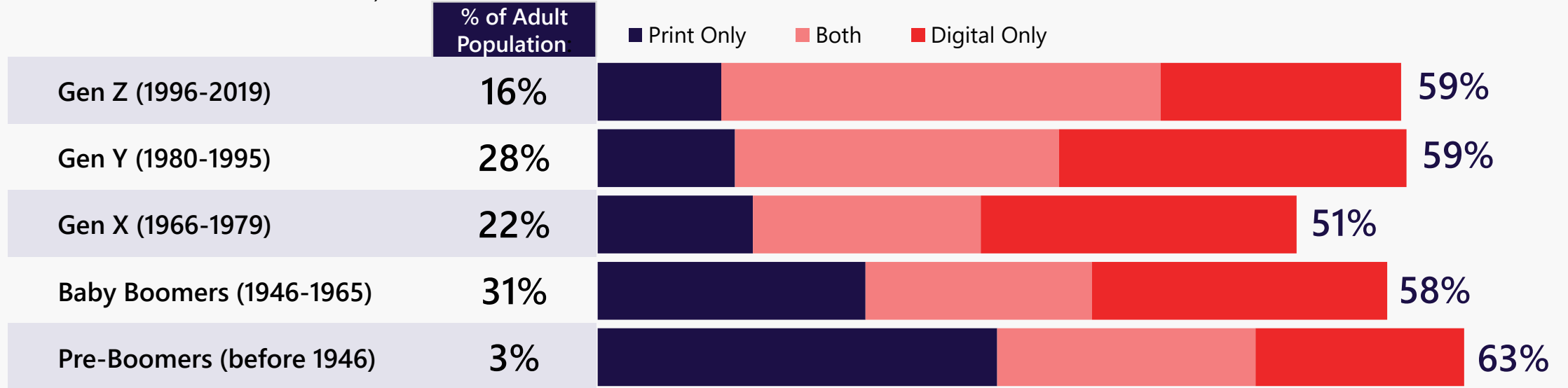
Newspaper brand readers are more active on digital during the weekdays than the weekends.

Weekday and Weekend AIR Readers (Major Markets, %18+):



Gen X, Y & Z access digital more than older generations.  
 Gen X and Baby Boomers are least likely to read both print and digital.

Any Newspaper, **Weekly Reach of Print/Digital** (Major Markets, %18+):





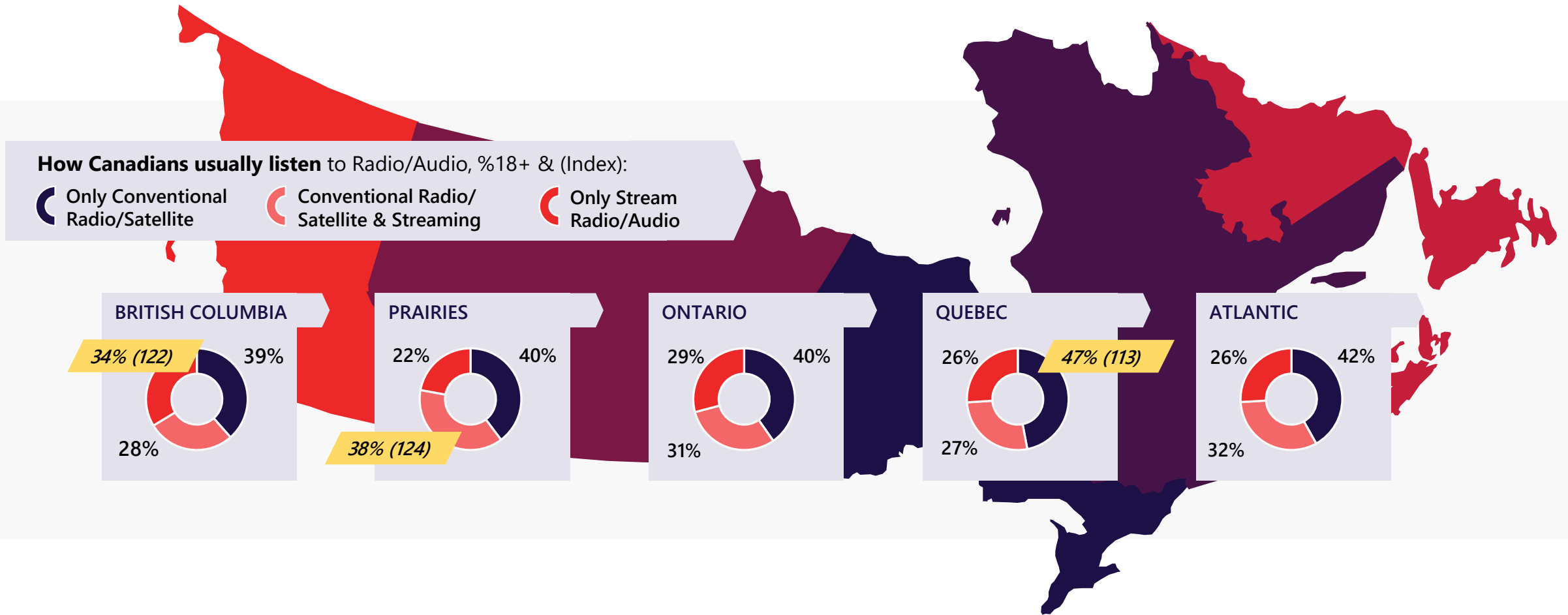
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# Radio & Audio

24M

or 77% of Canadians 18+  
listen to radio/audio content  
in an average week.

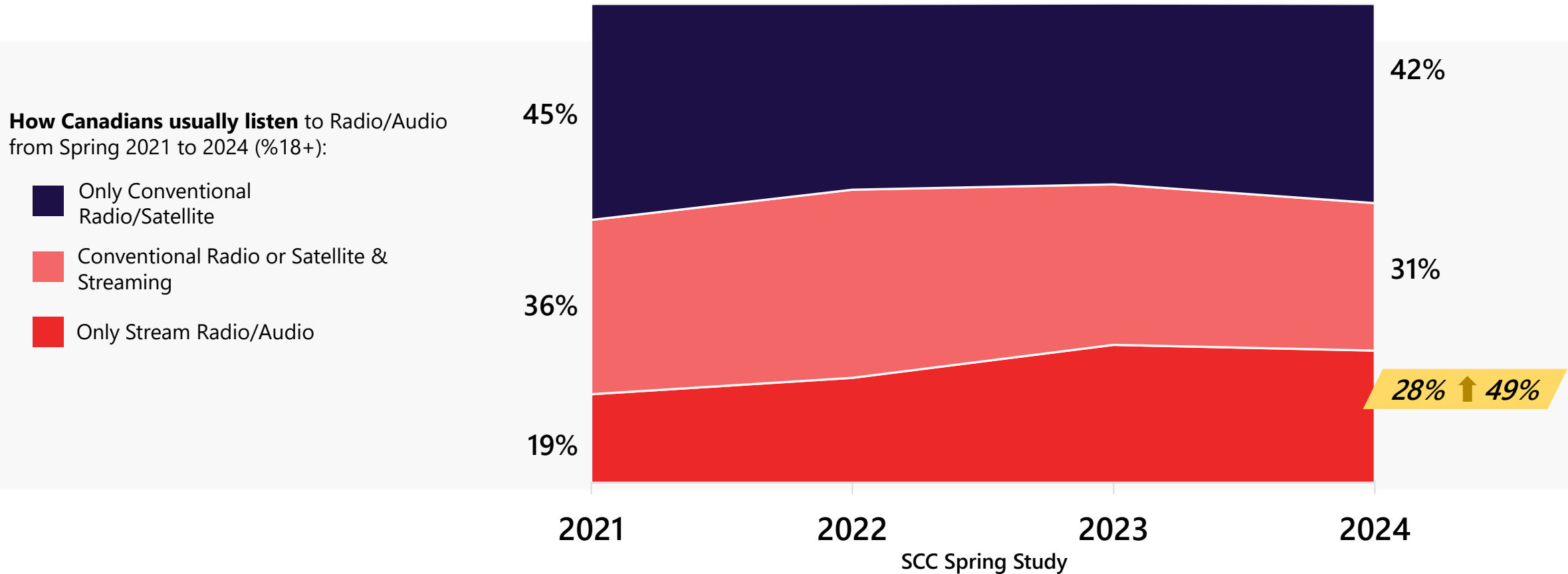
# Nearly 3 in 5 Canadians listen to streamed radio/audio content.



Source: Vividata's SCC | Study of the Canadian Consumer Spring 2024 **Base:** Total Canada 18+, Listen to Radio/Audio by any method  
**Only Conventional Radio/Satellite:** Selected "Receive Audio/Radio content" by Conventional Radio (e.g. AM, FM) or Satellite AND NOT by Free Streaming Services, Paid Subscription Streaming Services, Other. **Only Stream Radio/Audio:** Selected "Receive Audio/Radio content" by Free Streaming Services, Paid Subscription Streaming Services, Other AND by Conventional Radio (e.g. AM, FM) or Satellite. **Conventional Radio or Satellite & Streaming:** Selected "Receive Audio/Radio content" by Conventional Radio (e.g. AM, FM) or Satellite AND by Free Streaming Services, Paid Subscription Streaming Services, Other.

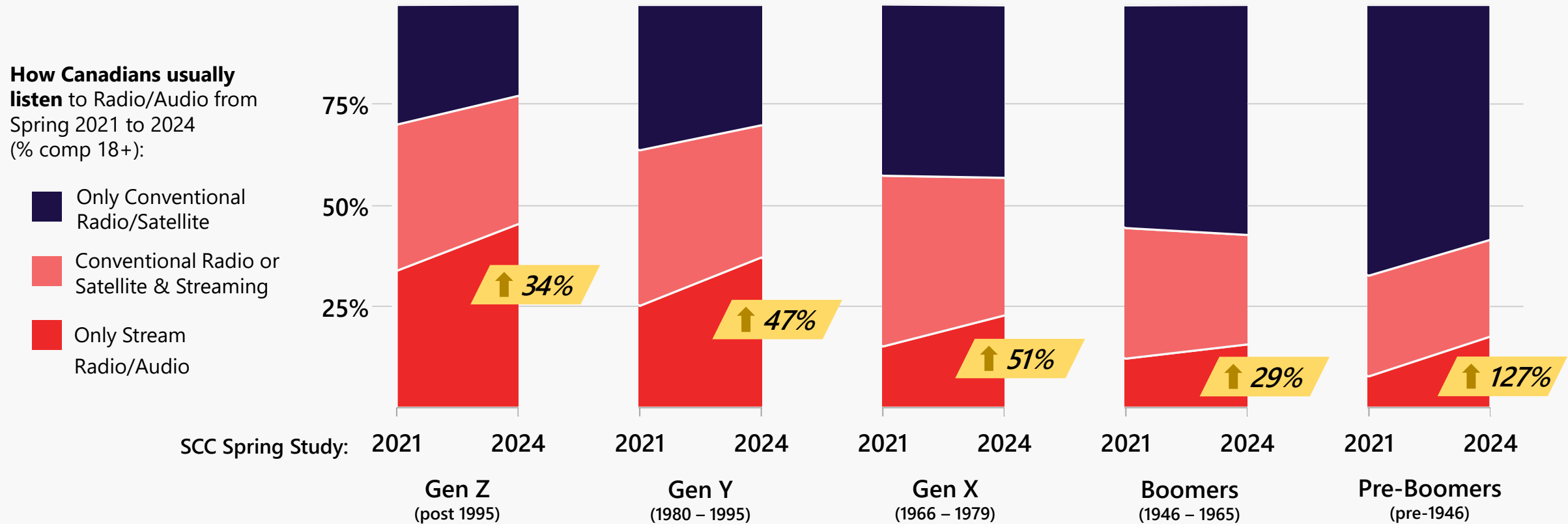
## SCC | SPRING 2024 | RADIO & AUDIO

While the proportion of Canadians that only stream radio/audio content **increased by 49%** over the past 3 years, conventional radio has stayed relatively stable.



## SCC | SPRING 2024 | RADIO & AUDIO

Conventional Radio/Satellite still reaches the **majority** of older Canadians, but those that choose to only stream radio/audio **continues to grow**.



Source: Vividata's SCC | Study of the Canadian Consumer Spring 2021 and 2024. **Base:** Total Canada 18+, Listen to Radio/Audio by any method

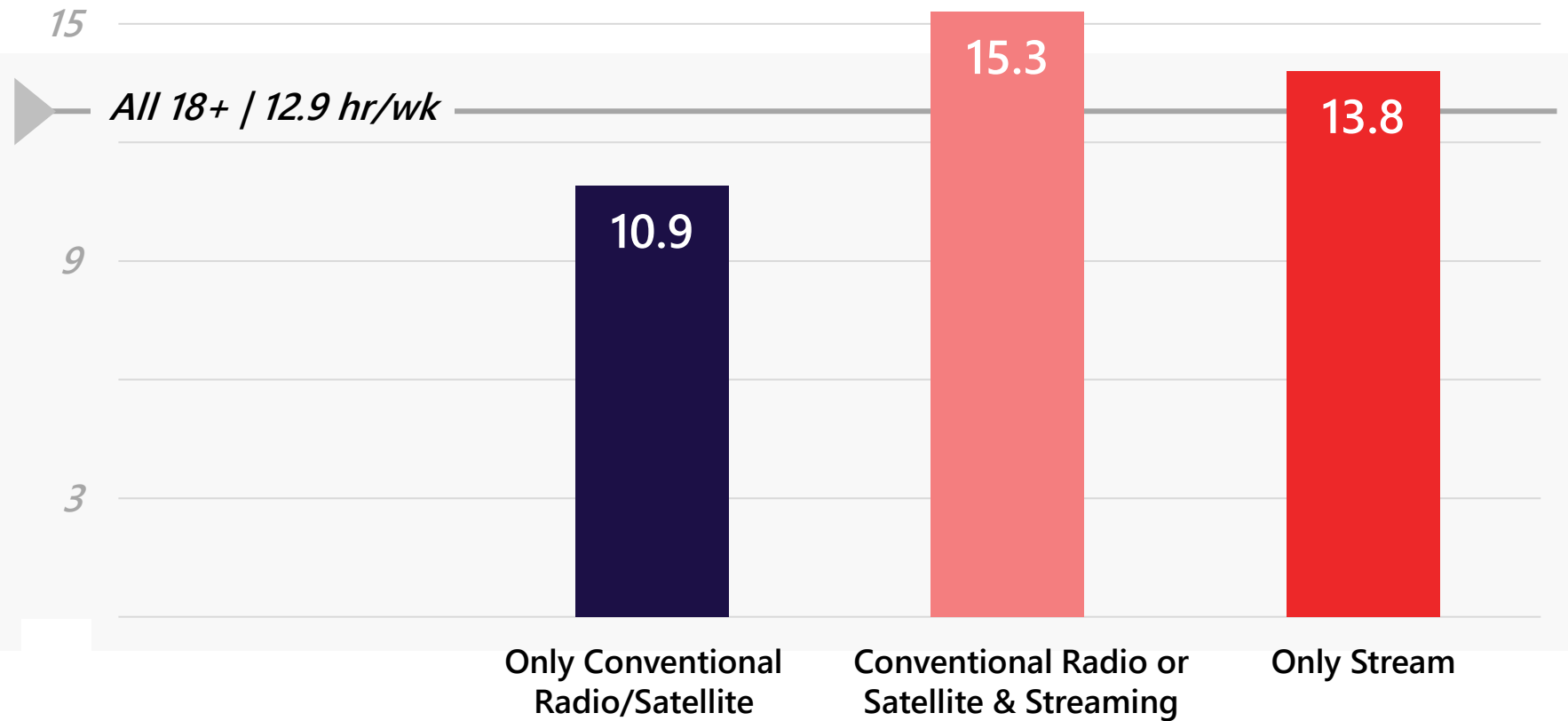
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Canadians that listen to radio/audio in a variety of formats spend more time listening in an average week.

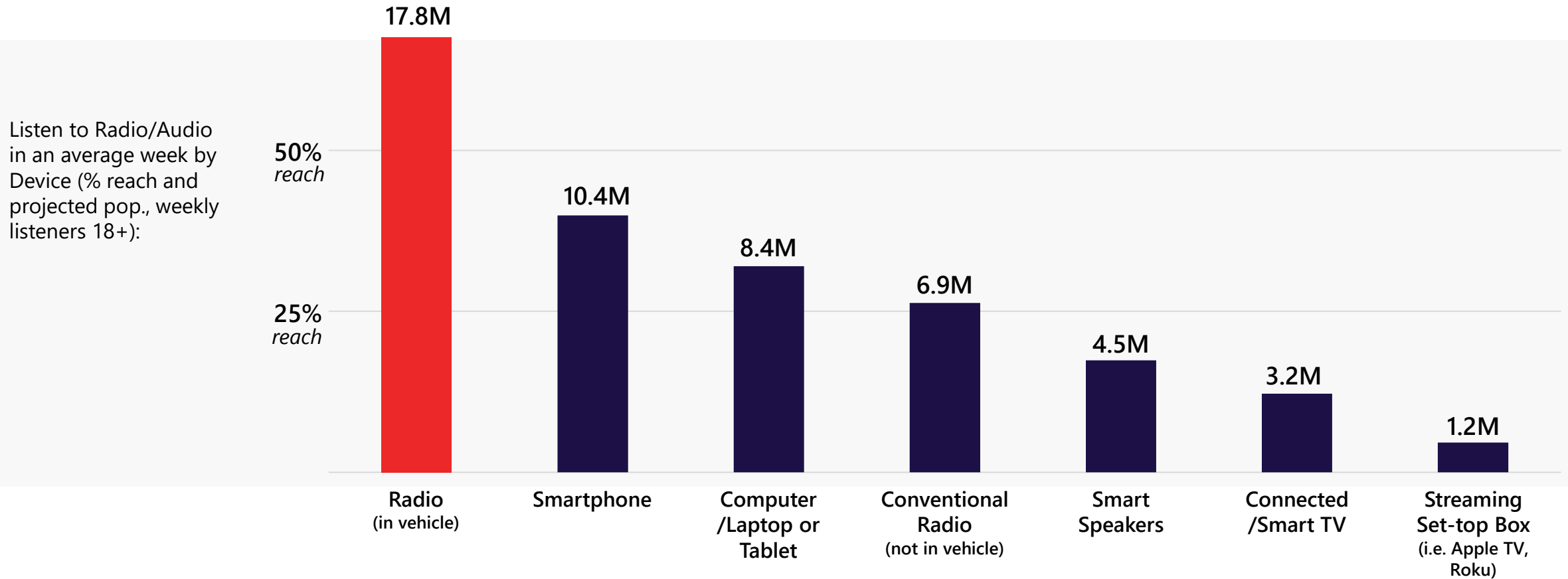
Hours spent listening to Radio/Audio in an average week (18+):



Source: Vividata's SCC | Study of the Canadian Consumer Spring 2024 Base: Total Canada 18+

**Only Conventional Radio/Satellite:** Selected "Receive Audio/Radio content" by Conventional Radio (e.g. AM, FM) or Satellite AND NOT by Free Streaming Services, Paid Subscription Streaming Services, Other. **Only Stream Radio/Audio:** Selected "Receive Audio/Radio content" by Free Streaming Services, Paid Subscription Streaming Services, Other AND by Conventional Radio (e.g. AM, FM) or Satellite. **Conventional Radio or Satellite & Streaming:** Selected "Receive Audio/Radio content" by Conventional Radio (e.g. AM, FM) or Satellite AND by Free Streaming Services, Paid Subscription Streaming Services, Other.

# In-vehicle listening dominates how Canadians listen to radio/audio content.





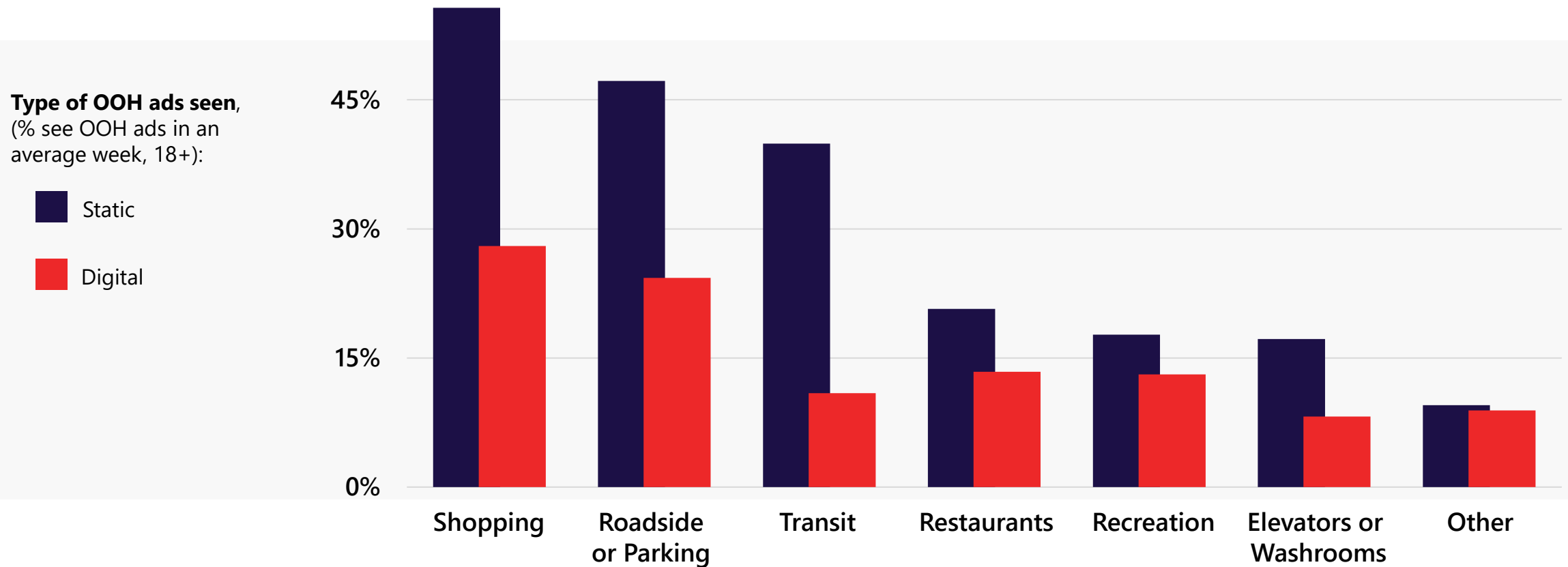
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# Out-Of-Home Media

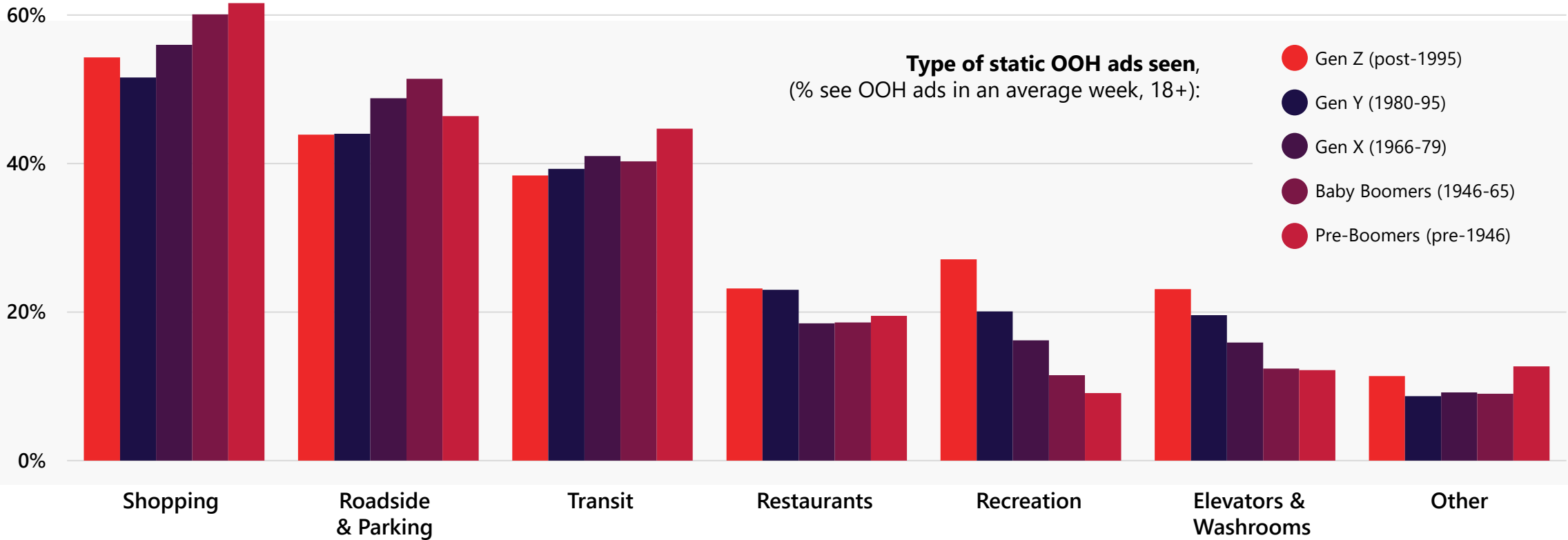
57%

or 18 million Canadians 18+  
see out-of-home advertising  
in an average week.\*

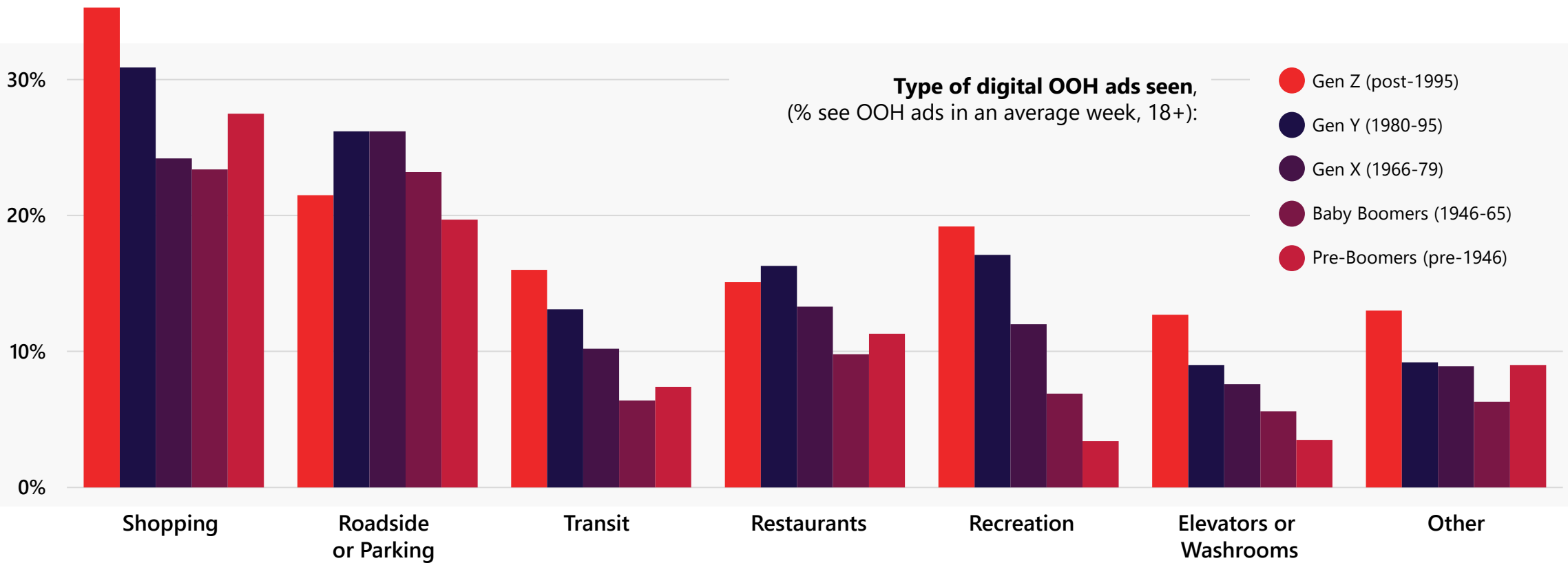
# Static and digital out-of-home awareness among Canadians that notice out-of-home ads.



# Older generations are more likely to notice static out-of-home ads while in shopping or roadside environments.



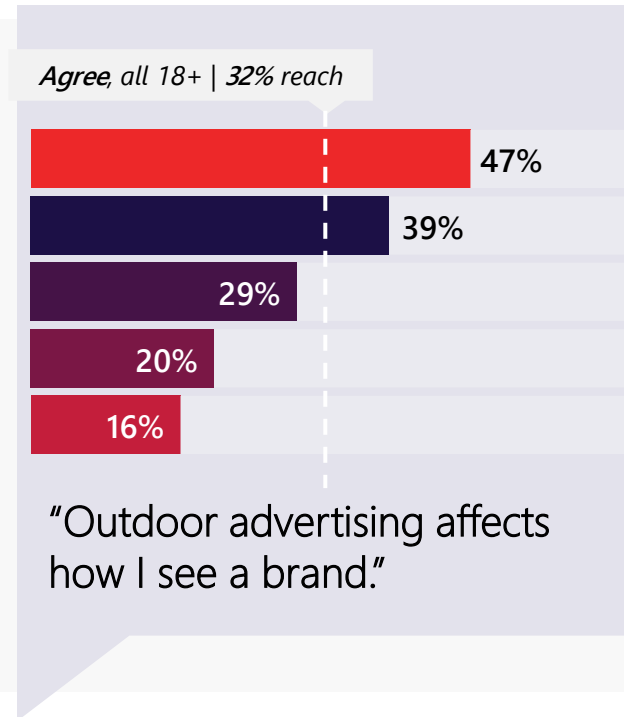
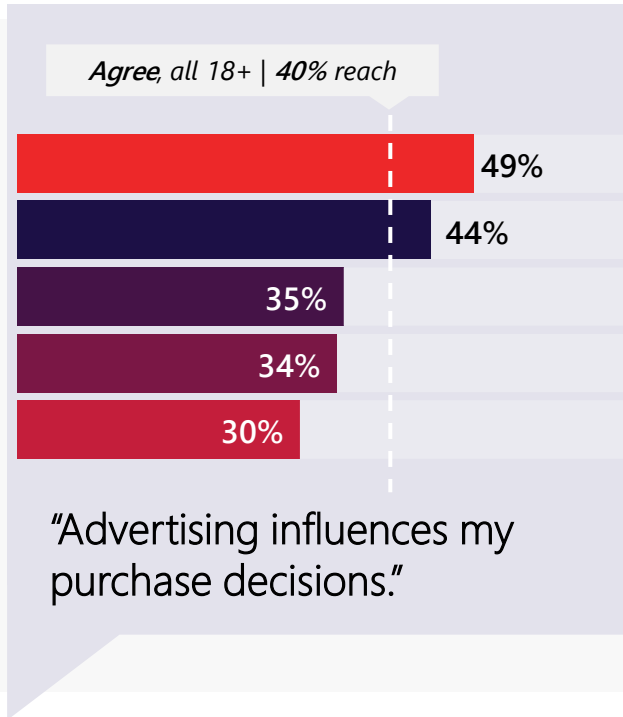
# Younger generations are more likely to notice digital out-of-home ads while in shopping, recreation or transit environments.



# Gen Z admits to being most affected by advertising; in their purchasing decisions and how they see a brand.

**% agree,**  
(see OOH ads in an average week, 18+):

- Gen Z (post-1995)
- Gen Y (1980-95)
- Gen X (1966-79)
- Baby Boomers (1946-65)
- Pre-Boomers (pre-1946)



Over  
**1 in 4**  
Gen Z-ers that see OOH ads in an average week report making a purchase.





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# What's New

## NEW IN MEDIA

### Television

- Watch more/less linear TV than 12 months ago
- Preference for streaming TV services with ads, without ads, or at lower price
- New weekly TV shows and WNBA viewership

### News Media

- Availability of local news compared to past 12 months

### Radio/Audio

- Time spent listening to traditional radio (daily)
- Time spent streaming radio (daily)

### New Statements

- Relevance of online ads
  - Personalized ads
  - Watching TV/Movies as a family and content for children
  - Social media and search as a news sources
- + *more!*

 **VIVIDATA TIP:** Type “**(new)**” in the search bar of your preferred software supplier to find new SCC variables, fast.

## NEW IN FINANCE

### Financial Services & Goals

- Factors when choosing a bank
- Important financial goals
- Financial advice sought in the past 12 months
- Sources relied on for financial advice
- Sources of supplemental income

### Credit Cards

- Reasons for using a credit card
- New credit card brands

### Mortgages

- Balance on mortgage
- Time left on mortgage
- Interest rate plan (Fixed, variable, etc.)

### New Statements

- Decentralized finance
- Knowledge and comfort with investing
- Seeking financial advice

+ *more!*

## NEW IN AUTOMOTIVE

### Vehicles

- Sources of product research before purchasing
- New models

### Gasoline

- Average weekly spend on gas  
Number of fills in an average month

### New Statements

- Autonomous vehicles, driving related to gas prices, and more.

## NEW IN TRAVEL

### Road Trips

- Road trips taken and intend to take
- Reasons for taking road trips

### Hotels & Motels

- Types stayed in (star rating)
- Key features when selecting

### New Statements

- Using reward points, vacation homes, luxury travel, traveling with family, and more.

## NEW IN OTHER CONSUMER CATEGORIES

### Alcohol

- New brands in cordials and liqueurs, whiskies and ryes, vodka, gin, brandy/cognac, and more.

### Health and Beauty

- New brands in facial cleansers and moisturizers, foundation, mascara, and more
- New medical conditions

### Shopping

- New shopping websites and apps
- Recommerce and reselling of luxury items
- Type of subscription box purchased (meal kits, pets, clothing/apparel etc. )

### Statements

- Using reward points on travel, vacation homes, luxury travel, traveling with family, and more.



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# Quintiles & Terciles

# Television Terciles

## LINEAR OR STREAMING

Hours per Week,  
All 18+

|        |               | All          | English      | French       |
|--------|---------------|--------------|--------------|--------------|
| Light  | <= 10.50      | <b>49.2%</b> | <b>50.8%</b> | <b>42.4%</b> |
| Medium | 10.51 – 21.00 | <b>32.8%</b> | <b>32.2%</b> | <b>33.1%</b> |
| Heavy  | 21.01+        | <b>18.4%</b> | <b>17.0%</b> | <b>24.5%</b> |

## LINEAR

Hours per Week,  
All 18+

|        |              |              |              |              |
|--------|--------------|--------------|--------------|--------------|
| Light  | <= 7.00      | <b>45.5%</b> | <b>48.0%</b> | <b>34.7%</b> |
| Medium | 7.00 – 13.99 | <b>29.6%</b> | <b>29.3%</b> | <b>30.6%</b> |
| Heavy  | 14.00+       | <b>24.9%</b> | <b>22.7%</b> | <b>34.7%</b> |

## STREAMING

Hours per Week,  
All 18+

|        |              |              |              |              |
|--------|--------------|--------------|--------------|--------------|
| Light  | <= 7.00      | <b>45.4%</b> | <b>47.4%</b> | <b>36.5%</b> |
| Medium | 7.00 – 13.99 | <b>33.9%</b> | <b>34.0%</b> | <b>33.6%</b> |
| Heavy  | 14.00+       | <b>20.7%</b> | <b>18.6%</b> | <b>29.9%</b> |

# Media Terciles

## RADIO

Live or Streaming,  
Hours per Week,  
All 18+

|        |             | All          | English      | French       |
|--------|-------------|--------------|--------------|--------------|
| Light  | <= 0.00     | <b>23.0%</b> | <b>22.4%</b> | <b>25.8%</b> |
| Medium | 0.01 – 3.50 | <b>32.3%</b> | <b>32.2%</b> | <b>32.4%</b> |
| Heavy  | 3.51+       | <b>44.7%</b> | <b>45.4%</b> | <b>41.8%</b> |

## INTERNET

Any online activity  
on any device,  
Hours per Week,  
All 18+

|        |               |              |              |              |
|--------|---------------|--------------|--------------|--------------|
| Light  | <= 10.50      | <b>29.1%</b> | <b>27.6%</b> | <b>35.8%</b> |
| Medium | 10.51 – 21.00 | <b>33.9%</b> | <b>33.9%</b> | <b>33.7%</b> |
| Heavy  | 21.01+        | <b>37.0%</b> | <b>38.5%</b> | <b>30.5%</b> |

## MOBILE INTERNET

Online activity on a  
mobile device,  
Hours per Week,  
All 18+

|        |              |              |              |              |
|--------|--------------|--------------|--------------|--------------|
| Light  | <= 3.50      | <b>32.5%</b> | <b>31.7%</b> | <b>36.0%</b> |
| Medium | 3.51 – 10.50 | <b>28.0%</b> | <b>27.3%</b> | <b>30.8%</b> |
| Heavy  | 10.51+       | <b>39.5%</b> | <b>41.0%</b> | <b>33.2%</b> |



# Magazine Quintiles

|  |              | All           | English      | French        |              |               |              |
|--|--------------|---------------|--------------|---------------|--------------|---------------|--------------|
| <b>PRINT</b><br>Issues per Month,<br>All 18+                           | Light        | <= 0.00       | <b>41.5%</b> | <= 0.000      | <b>41.1%</b> | <= 0.000      | <b>42.9%</b> |
|  | Medium-Light | 0.001 – 0.306 | <b>15.0%</b> | 0.001 – 0.306 | <b>15.4%</b> | 0.001 – 0.323 | <b>15.1%</b> |
|  | Medium       | 0.307 – 0.680 | <b>14.4%</b> | 0.307 – 0.680 | <b>14.4%</b> | 0.324 – 0.758 | <b>14.4%</b> |
|  | Medium-Heavy | 0.681 – 1.900 | <b>15.3%</b> | 0.681 – 1.900 | <b>14.9%</b> | 0.759 – 1.710 | <b>13.7%</b> |
|  | Heavy        | 1.901+        | <b>13.8%</b> | 1.901+        | <b>14.2%</b> | 1.711+        | <b>13.9%</b> |
| <b>PRINT</b><br>Issues per Month,<br>Users Only, 18+                   | Light        | <= 0.244      | <b>19.9%</b> | <= 0.236      | <b>19.9%</b> | <= 0.293      | <b>19.7%</b> |
|  | Medium-Light | 0.245 – 0.454 | <b>20.0%</b> | 0.237 – 0.447 | <b>20.0%</b> | 0.294 – 0.478 | <b>20.3%</b> |
|  | Medium       | 0.455 – 0.938 | <b>20.0%</b> | 0.448 – 0.925 | <b>20.0%</b> | 0.479 – 1.006 | <b>19.9%</b> |
|  | Medium-Heavy | 0.939 – 2.200 | <b>20.0%</b> | 0.926 – 2.244 | <b>20.1%</b> | 1.007 – 2.008 | <b>19.8%</b> |
|  | Heavy        | 2.201+        | <b>20.1%</b> | 2.245+        | <b>20.0%</b> | 2.009+        | <b>20.3%</b> |
| <b>DIGITAL</b><br># of Times Accessed<br>per Month, All 14+            | Light        | <= 0.00       | <b>50.3%</b> | <= 0.00       | <b>50.9%</b> | <= 0.00       | <b>47.8%</b> |
|  | Medium-Light | 0.01 - 1.00   | <b>11.6%</b> | 0.01 – 1.00   | <b>11.7%</b> | 0.01 – 1.50   | <b>13.2%</b> |
|  | Medium       | 1.01 – 4.99   | <b>13.5%</b> | 1.01 – 4.99   | <b>13.2%</b> | 1.51 – 4.99   | <b>12.7%</b> |
|  | Medium-Heavy | 5.00 – 16.00  | <b>12.3%</b> | 5.00 – 16.00  | <b>11.7%</b> | 5.00 – 13.50  | <b>13.2%</b> |
|  | Heavy        | 16.01+        | <b>12.3%</b> | 16.01+        | <b>12.5%</b> | 13.51+        | <b>13.1%</b> |
| <b>DIGITAL</b><br># of Times Accessed<br>per Month,<br>Users Only, 14+ | Light        | <= 1.00       | <b>23.4%</b> | <= 1.00       | <b>23.8%</b> | <= 1.00       | <b>21.4%</b> |
|  | Medium-Light | 1.01 – 3.00   | <b>18.3%</b> | 1.01 – 3.00   | <b>18.3%</b> | 1.01 – 3.00   | <b>18.6%</b> |
|  | Medium       | 3.01 – 8.00   | <b>20.2%</b> | 3.01 – 7.50   | <b>17.9%</b> | 3.01 – 7.00   | <b>20.1%</b> |
|  | Medium-Heavy | 8.01 – 25.00  | <b>18.9%</b> | 7.51 – 27.00  | <b>20.6%</b> | 7.01 – 18.50  | <b>20.0%</b> |
|  | Heavy        | 25.01+        | <b>19.2%</b> | 27.01+        | <b>19.4%</b> | 18.51+        | <b>19.9%</b> |

# Newspaper Quintiles

|  |              | All           | English      | French        |              |               |              |
|--|--------------|---------------|--------------|---------------|--------------|---------------|--------------|
| <b>PRINT</b><br>Days per Week,<br>All 18+                              | Light        | <= 0.000      | <b>72.5%</b> | <= 0.000      | <b>74.0%</b> | <= 0.000      | <b>66.3%</b> |
|  | Medium-Light | 0.001 – 1.250 | <b>8.5%</b>  | 0.001 – 1.250 | <b>7.2%</b>  | 0.001 – 1.000 | <b>9.6%</b>  |
|  | Medium       | 1.251 – 2.750 | <b>6.1%</b>  | 1.251 – 2.750 | <b>5.8%</b>  | 1.001 – 2.375 | <b>9.8%</b>  |
|  | Medium-Heavy | 2.751 – 4.875 | <b>6.3%</b>  | 2.751 – 4.875 | <b>6.2%</b>  | 2.376 – 4.250 | <b>7.5%</b>  |
|  | Heavy        | 4.876+        | <b>6.6%</b>  | 4.876+        | <b>6.8%</b>  | 4.251+        | <b>6.8%</b>  |
| <b>PRINT</b><br>Days per Week,<br>Users Only, 18+                      | Light        | <= 1.000      | <b>21.2%</b> | <= 1.000      | <b>18.7%</b> | <= 0.750      | <b>21.6%</b> |
|  | Medium-Light | 1.001 – 1.875 | <b>18.8%</b> | 1.001 – 2.000 | <b>21.4%</b> | 0.751 – 1.250 | <b>20.9%</b> |
|  | Medium       | 1.876 – 3.250 | <b>19.9%</b> | 2.001 – 3.500 | <b>20.3%</b> | 1.251 – 2.624 | <b>20.3%</b> |
|  | Medium-Heavy | 3.251 – 5.000 | <b>20.2%</b> | 3.501 – 5.375 | <b>20.2%</b> | 2.625 – 4.500 | <b>18.6%</b> |
|  | Heavy        | 5.001+        | <b>19.9%</b> | 5.376+        | <b>19.4%</b> | 4.5001+       | <b>18.6%</b> |
| <b>DIGITAL</b><br># of Times Accessed<br>per Month, All 14+            | Light        | <= 0.00       | <b>38.4%</b> | <= 0.00       | <b>39.2%</b> | <= 0.00       | <b>35.2%</b> |
|  | Medium-Light | 0.01 – 2.50   | <b>16.3%</b> | 0.01 – 2.50   | <b>16.5%</b> | 0.01 – 3.50   | <b>17.8%</b> |
|  | Medium       | 2.51 – 10.00  | <b>16.8%</b> | 2.51 – 10.00  | <b>16.5%</b> | 3.51 – 10.50  | <b>16.5%</b> |
|  | Medium-Heavy | 10.01 – 34.00 | <b>14.2%</b> | 10.01 – 34.00 | <b>14.2%</b> | 10.51 – 35.50 | <b>16.8%</b> |
|  | Heavy        | 34.01+        | <b>14.3%</b> | 34.01+        | <b>13.6%</b> | 35.51+        | <b>13.7%</b> |
| <b>DIGITAL</b><br># of Times Accessed<br>per Month,<br>Users Only, 14+ | Light        | <= 2.00       | <b>21.2%</b> | <= 2.00       | <b>22.2%</b> | <= 2.50       | <b>23.3%</b> |
|  | Medium-Light | 2.01 – 6.00   | <b>19.9%</b> | 2.01 – 6.00   | <b>19.8%</b> | 2.51 – 9.50   | <b>20.4%</b> |
|  | Medium       | 6.01 – 14.00  | <b>19.5%</b> | 6.01 – 14.50  | <b>19.7%</b> | 9.51 – 19.50  | <b>19.8%</b> |
|  | Medium-Heavy | 14.01 – 35.00 | <b>19.6%</b> | 14.51 – 35.00 | <b>19.1%</b> | 19.51 – 38.50 | <b>18.5%</b> |
|  | Heavy        | 35.01+        | <b>19.8%</b> | 35.01+        | <b>19.2%</b> | 38.51+        | <b>18.0%</b> |



## About Us

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