

Two Nations and Their Perceptions of Media Habits

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MEASURE the media behaviors/attitudes of the Canadian "Public" - if/how they might differ from the "Industry"

ASSESS how well the "Industry" understands the behaviors/attitudes, of the "Public"

CONSIDER if/how the "Industry" behaviors and attitudes inform their perceptions of the "Public"



think

context



Context Item #1 – News about TV is alarming





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WHERE TV RATINGS GO FROM HERE

Audiences Are Down, Down, Down, According to Nielsen



series it had canceled four months earlier, engineers temporarily dammed half of Niagara Falls as part of an effort to stem erosion there. After studying the dry ledge and the basin below, geologists concluded that there wasn't an awful lot they could do to preserve the American Falls, and that the waters of Lake Erie would likely subsume the landmark in around 50,000 years, give or take.

In June of 1969, a few days after NBC aired the final burn-off episode of "Star Trek," a

Fast-forward 47 years, and CRS is prepping the first "Star Trek" series in more than a decade, to stream exclusively on the network's over-the-top service, and the erosion of primetime TV ratings is more implacable than the assault on that big pile of rocks

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Canadians watching less traditional TV, more streaming services like Netflix, CRTC says	Future of TV Consumption
A new report by Canada's broadcast regulator provides further evidence of dramatic shifts in the industry as major cable companies and broadcasters struggle to hold onto market share in the face of competition from Internet- based rivals such as Netflix	By Jonah G Oct. 20

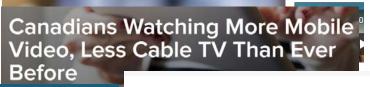
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Home Opinion World Canada Politics Health Entertainment Technology & Science Business usiness Tax Season CBC SecureDrop

Canadians consuming less TV and radio but more m overall, CRTC says

Canadians are consuming more content, but increasingly it's coming via digital means - not traditional ones By Pete Evans, CBC News Posted: Oct 25, 2016 1:33 PM ET | Last Updated: Oct 25, 2016 1:45 PM ET





Future of TV Consumption, by Jonah Guo

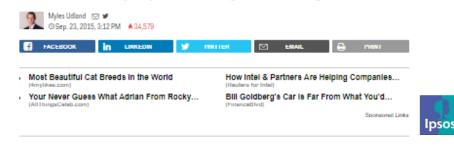
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By Jonah Guo

🚽 1 of 16 📐

BIV: CRTC report show Canadians watching less TV

The number of people watching TV is falling off a cliff



Traditional TV's demographic woes get worse

BII FACEBOOK

BUSINESS

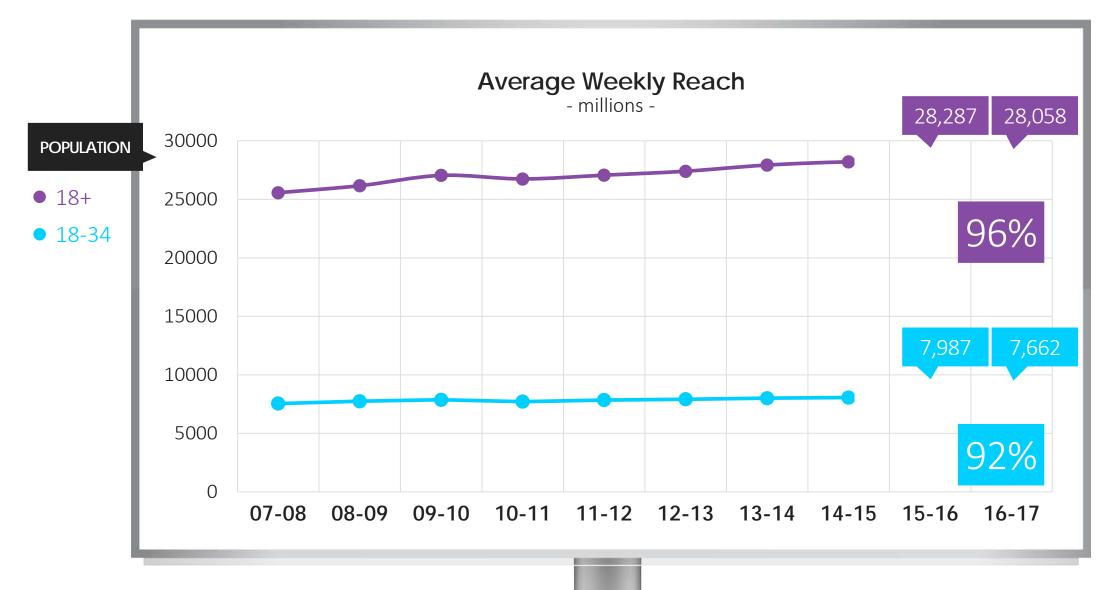
This story was delivered to BI Intelligence "Digital Media Briefing" subscribers. To learn more and subscribe, please click here. Traditional TV viewership continues to fall among every major demographic between the ages of 2 and 49, according to Nielsen's Q3 2016 Total Audience

Time Spent Watching Traditional TV, By Age Group

ENTERTAINMENT

Teenagers (12-17) are showing the largest decline, with viewership falling 11% year-over-year (YoY) in

Context Item #2 – yet TV viewing numbers are massive think





Context item #3 – Industry perceptions of the health of the 30 second TV spot have not changed in 10 years

The traditional 30 second TV spot is dying

2017	31%	51%	18%	
2015	32%	47%	21%	
2014	27%	53%	20%	
2013	28%	51%	21%	
2012	26%	43%	31%	
2011	21%	51%	28%	
2010	29%	45%	26%	
2009	28%	50%	22%	
2008	28%	53%	19%	
2007	29%	43%	28%	

Agree Neutral Disagree



think

Context Item #4 – about US and THEM.





We - the advertising industry - are Ontario / GTA centric



Context Item #4 – about US and THEM.



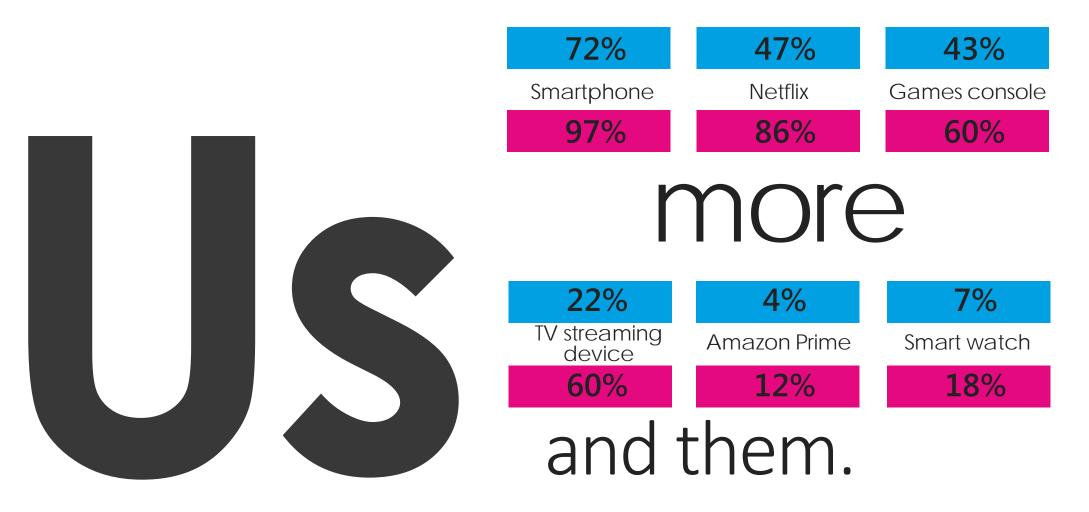


We are younger than the general population



Context Item #4 – about US and THEM.





We have more stuff









Them (Canadian Public)

Three summary points

TV viewing "on a television" continues to be pervasive.

2

TV advertising is seen as the most compelling form of advertising.

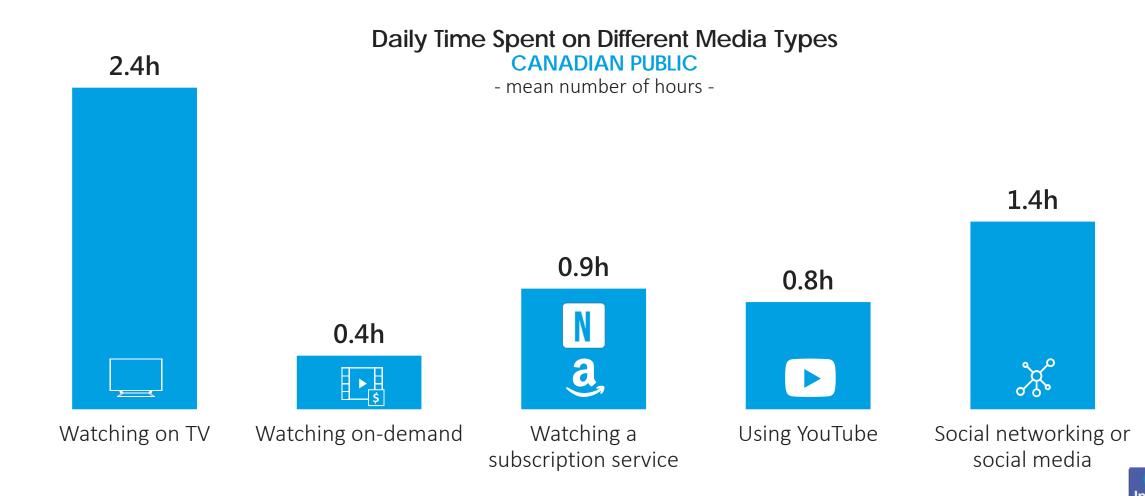
3.

Opportunity to improve the public's trust in advertising.



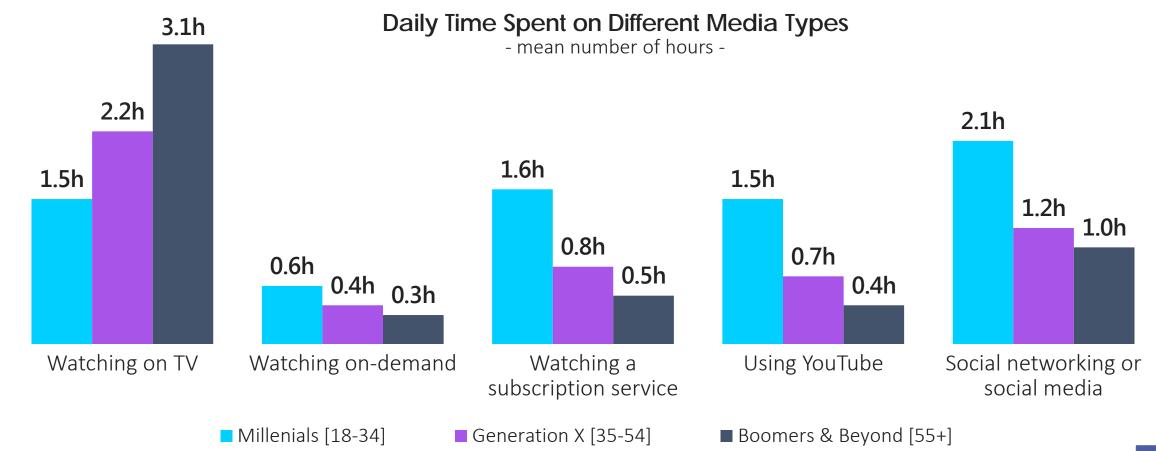
TV viewing "on a television" continues to be pervasive.

Canadians are engaged with TV – it remains pervasive think NOTE: estimates here are self-reported; actual TV viewing best reported via Numeris passive data



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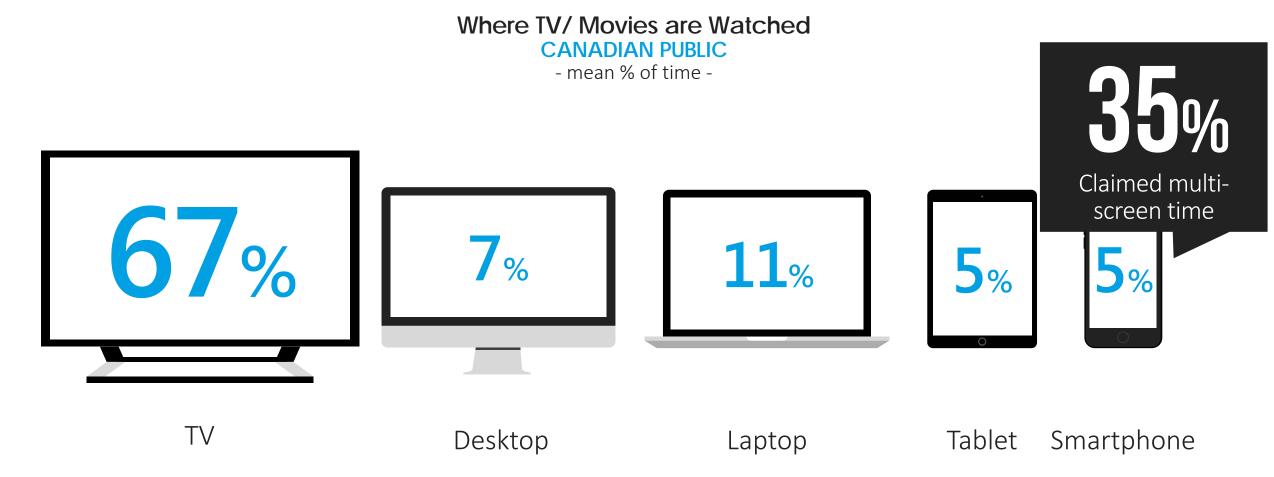
Millennials are multi media viewing hogs – they do not think discriminate NOTE: estimates here are self-reported; actual TV viewing best reported via Numeris passive data



In an average day, approximately how much time do you spend doing the following activities?



TV is the primary device of choice for viewing broadcast television

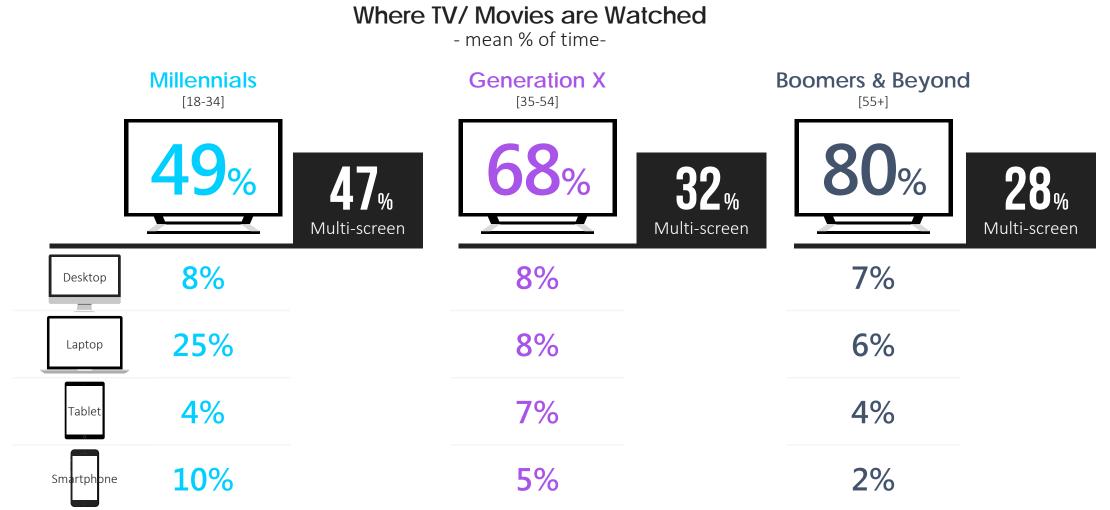




think

Of the time you spend watching TV shows or movies (excluding DVDs or shows from a subscription on-demand service like Netflix or Amazon), what percentage of that time is spent watching on a...? When watching TV, for what percentage of time do you think you use another device (smartphone, tablet, laptop/PC, etc.) at the same time?

TV is the primary device of choice for viewing TV shows – across generations



Of the time you spend watching TV shows or movies (excluding DVDs or shows from a subscription on-demand service like Netflix or Amazon), what percentage of that time is spent watching on a...? When watching TV, for what percentage of time do you think you use another device (smartphone, tablet, laptop/PC, etc.) at the same time?



think

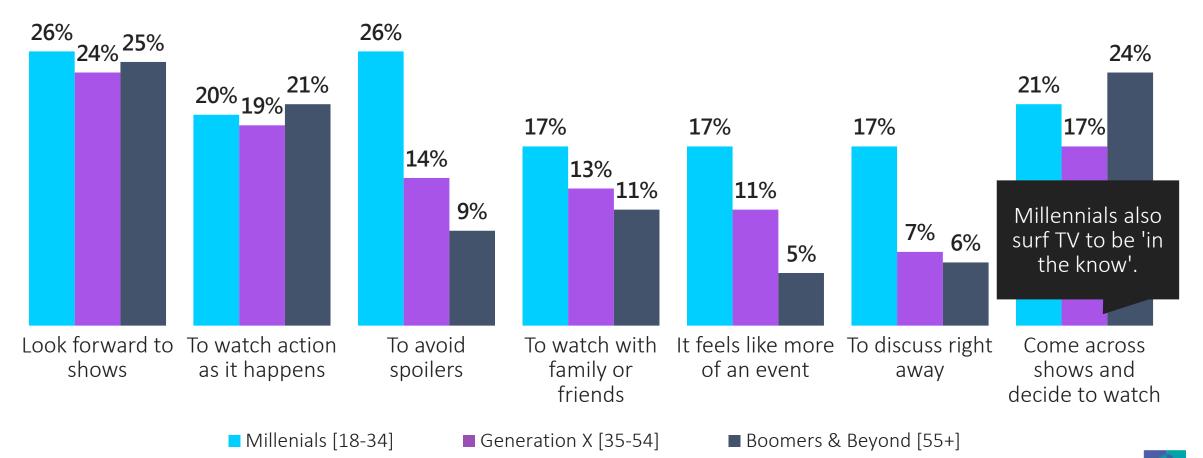
People enjoy appointment viewing - it is 'live' and it think is 'social' Many people Why do People Watch Live TV? **CANADIAN PUBLIC** turn to TV to see what's on. 25% 20% 20% 15% 14% 10% **9%** Look forward to To watch action It feels like more To discuss right To avoid To watch with Come across family or of an event shows and shows as it happens spoilers away decide to watch friends

Why do you watch any TV shows live at the time they are broadcast rather than watch later recorded or via catch up/ on demand?



Millennials enjoy appointment viewing because it is 'live' and 'feels like an event'

Why do People Watch Live TV?



Why do you watch any TV shows live at the time they are broadcast rather than watch later recorded or via catch up/ on-demand?



think

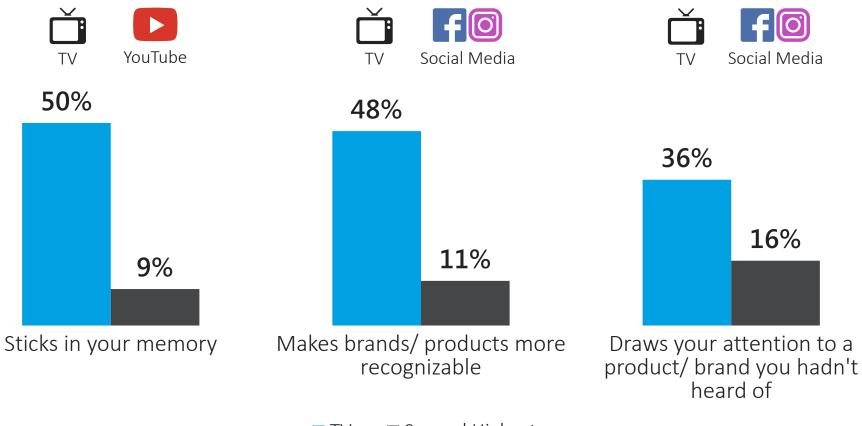
2.

TV advertising is the most compelling form of advertising.

TV advertising is the most likely to stick, draw attention and make brands recognizable – TV has impact



Media Sources on Which You Find Advertising That... CANADIAN PUBLIC



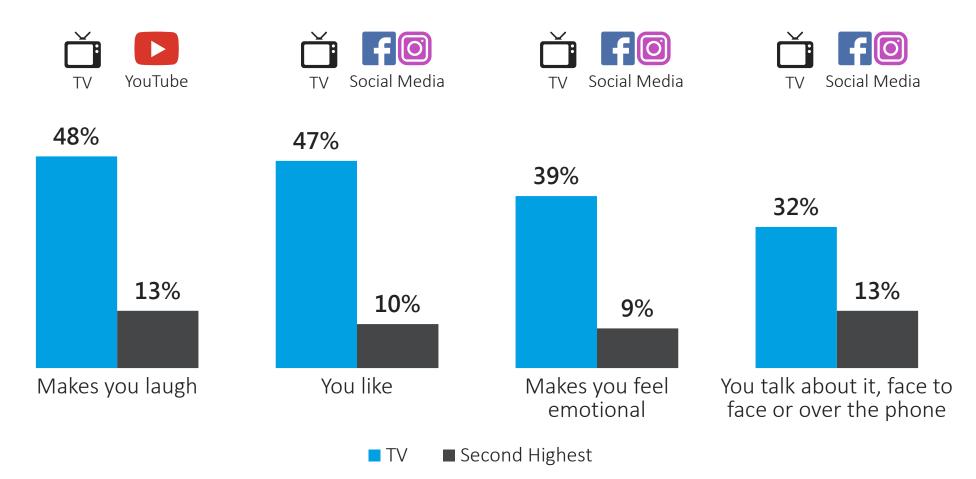
■ TV ■ Second Highest



TV advertising is the most likely to generate emotion and conversation



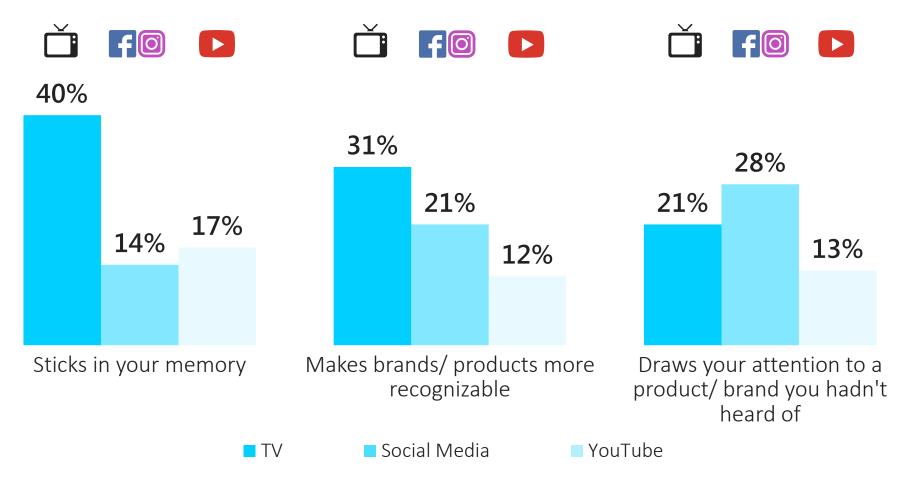
Media Sources on Which You Find Advertising That... CANADIAN PUBLIC





For Millennials TV advertising is the most likely to stick and make brands recognizable

Media Sources on Which You Find Advertising That... MILLENNIALS



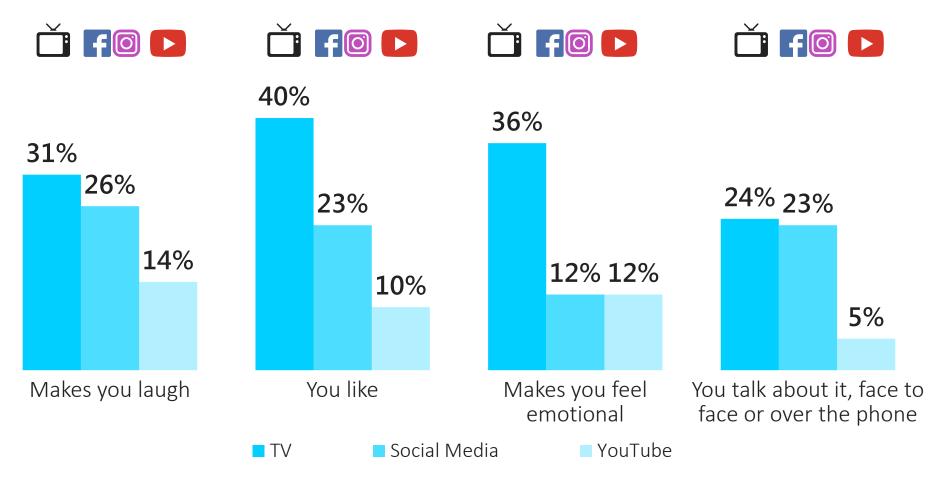


think

For Millennials TV advertising is the most likely to generate emotion and conversation



Media Sources on Which You Find Advertising That... MILLENNIALS





3.

Opportunity to improve the public's trust in advertising.

Who do people trust?



% agree

	GLOBAL	CANADA
International institutions	48%	49%
Banks	41%	55%
Justice system	41%	51%
Big companies	39%	36%
The government	29%	40%
Political parties	19%	29%
The media	32%	43%



Clear opportunity to improve the public's trust in advertising – across all media

Don't trust advertising in any form of media

Millennials [18-34]

29%

Generation X Boomers & [35-54] Beyond [55+]

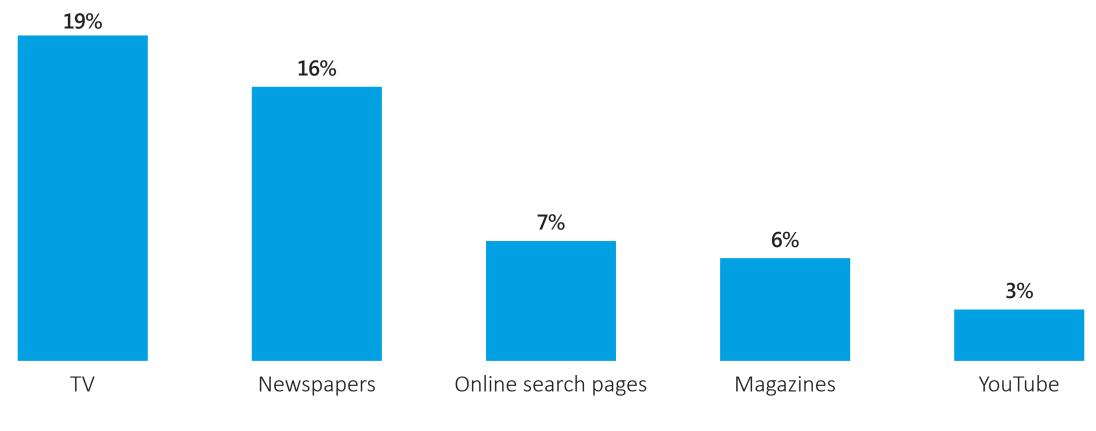
29%

34%

In which of the following media are you most likely to find advertising that.

Clear opportunity to improve the public's trust in advertising – across all media

Media Sources on Which You Find Advertising That... YOU TRUST



Canadian Public

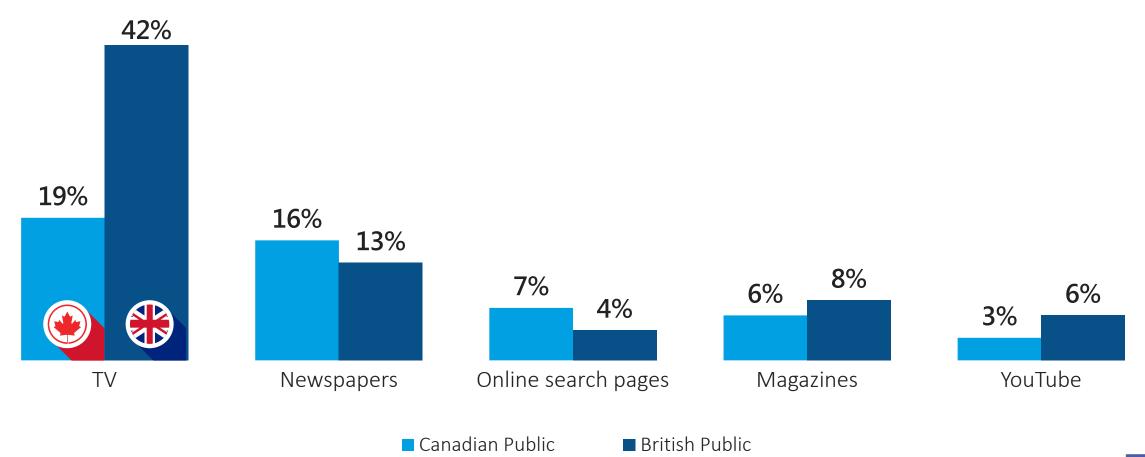


think

Trust in TV advertising in the UK is clearly stronger – opportunity for Canada to improve



Media Sources on Which You Find Advertising That... YOU TRUST





Looking Forward

- TV is, and will remain, a powerful force for the foreseeable future.
- TV will likely continue to lead the way in terms of being seen as a medium that creates laughter, engenders emotion, sticks in the memory of the public and draws attention to brands.
- There is an opportunity to harness the power and memorability of television advertising to further the conversation on social.
- There is clearly an opportunity for advertising across <u>ALL</u> media channels in Canada to address the public's lack of trust.

(Industry Professionals)

Two summary points and one consideration

Industry media habits/ practices are markedly different from that of the public.

Industry perceptions of what the public thinks and does from a media consumption perspective are different enough.

QUESTION FOR US TO CONSIDER Does this impact our judgment? Our lens appears to be colouring how much we think Canadians are consuming media NOTE: estimates here are self-reported; actual TV viewing best reported via Numeris passive data

Industry Professionals

Daily Time Spent on Different Media Types - mean number of hours -2.9h 2.4h 2.3h 2.3h 1.8h 1.6h 1.5h 1.4h 1.3h 1.3h 0.9h 0.8h 0.6h 0.5h 0.4h Watching on TV Watching Watching a Using YouTube Social networking or on-demand subscription service social media

Industry's Estimate of General Public

In an average day, approximately how much time do you spend doing the following activities?

Canadian Public



think

Our lens appears to be colouring where we think Canadians are consuming media



Where TV/ Movies are Watched - mean % of time-Industry's Estimate of **Canadian Public Industry Professionals General Public 52**% **60**% 35% Multi-screen Multi-screen Multi-screen 5% 7% 3% Desktop

 Laptop
 11%
 13%
 16%

 Tablet
 5%
 10%
 11%

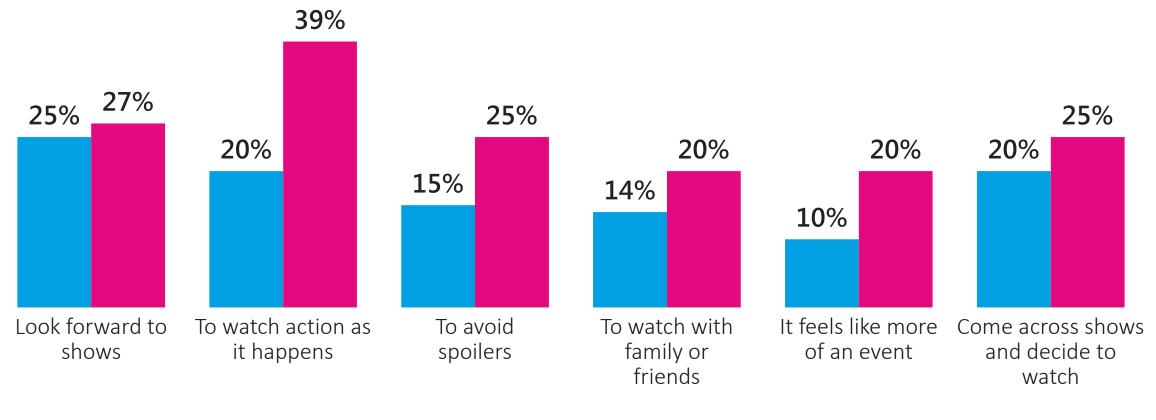
 Smartphone
 5%
 8%
 13%

Of the time you spend watching TV shows or movies (excluding DVDs or shows from a subscription on-demand service like Netflix or Amazon), what percentage of that time is spent watching on a...? When watching TV, for what percentage of time do you think you use another device (smartphone, tablet, laptop/PC, etc.) at the same time?



People enjoy appointment viewing mostly because it think is live and it is social - and so do we

Why do People Watch Live TV?



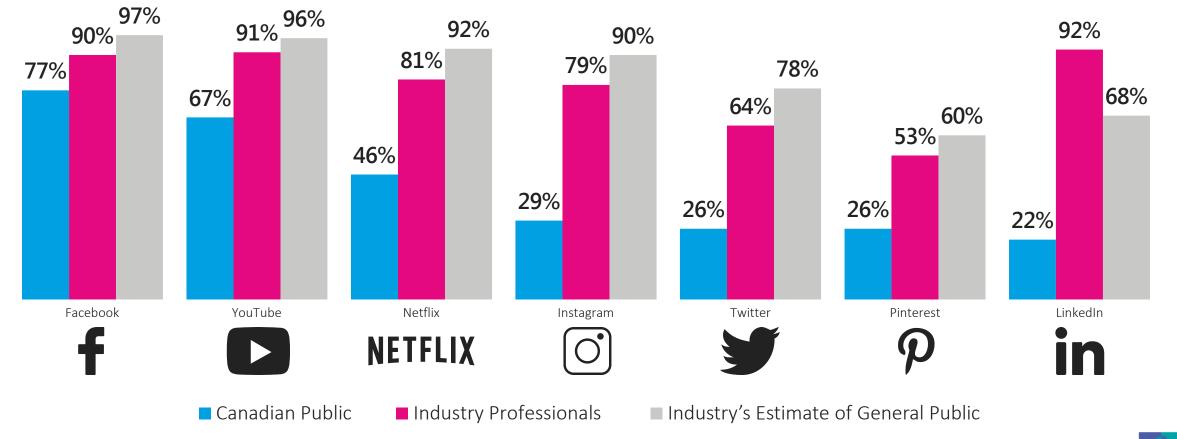
Canadian Public

Industry Professionals



Our lens appears to be colouring what we think Canadians think are doing – app usage

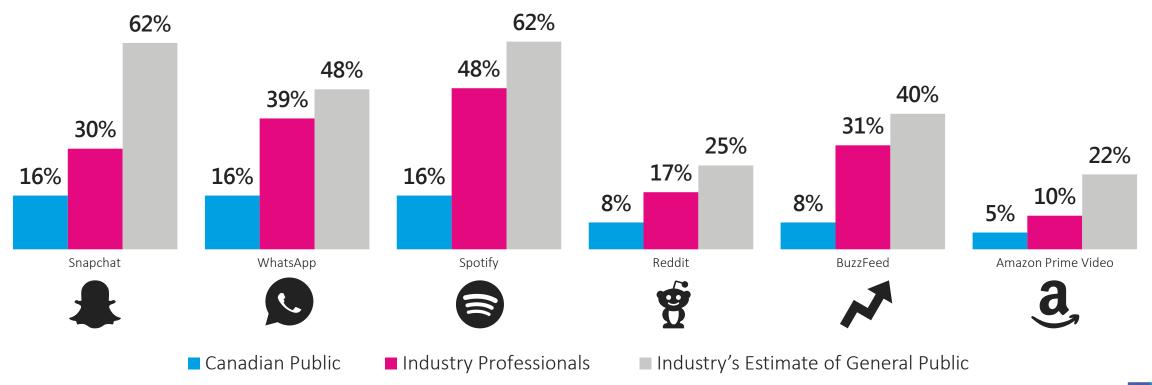
Apps Used in the Last Month



Which of the following websites, apps, or services have you visited or used in the last 1 month?

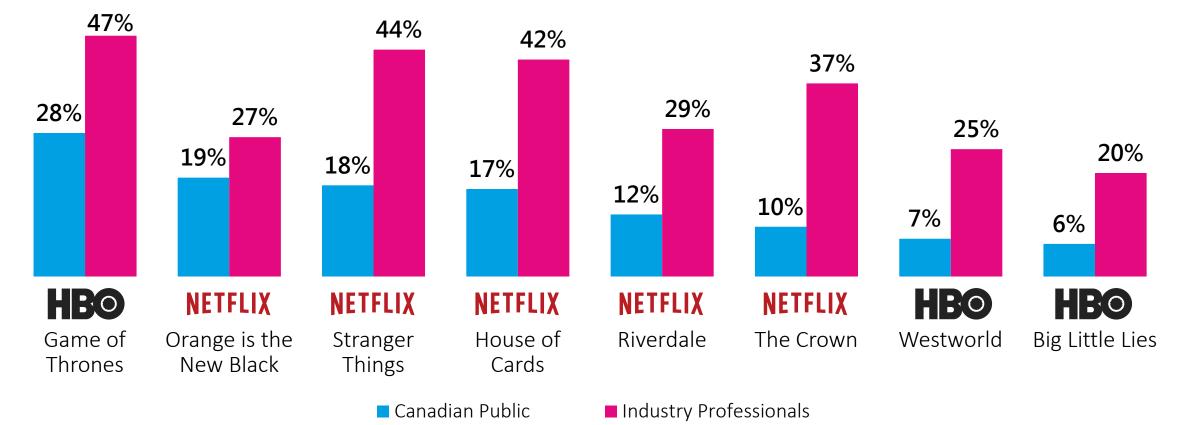
Our lens appears to be colouring what we think Canadians think are doing – app usage

Apps Used in the Last Month



They're not watching what we watch – does this influence our opinion?

At least One Episode Watched in P6M

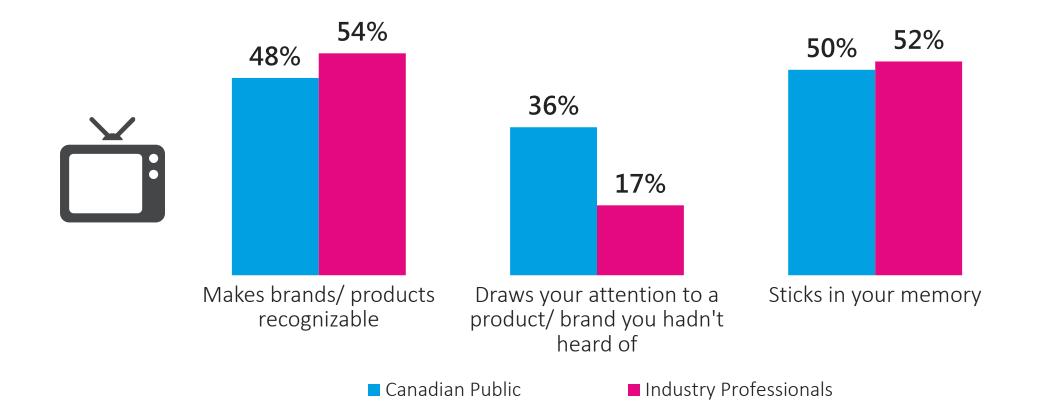


Which of the following shows have you watched at least one episode of in the last 6 months?

think

TV advertising effectiveness – similarities and differences between the public and the industry

Media Sources on Which You Find Advertising That... $\ensuremath{\mathsf{TV}}$



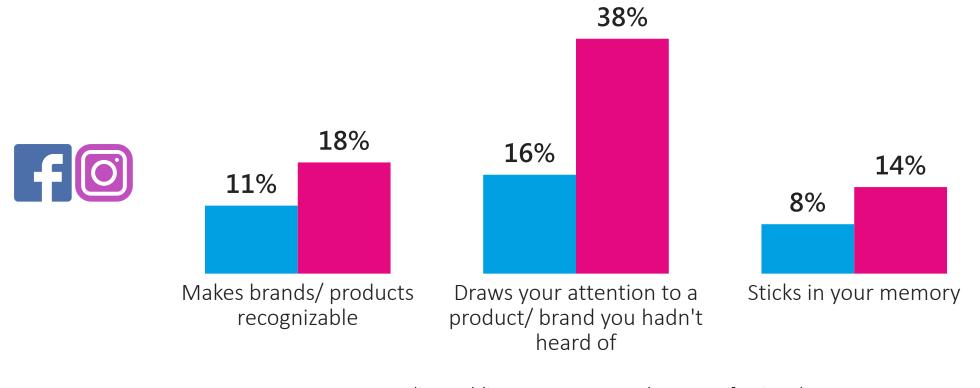


think

Divergence between the public and the industry on perceptions of advertising using social media



Media Sources on Which You Find Advertising That... SOCIAL MEDIA



Canadian Public

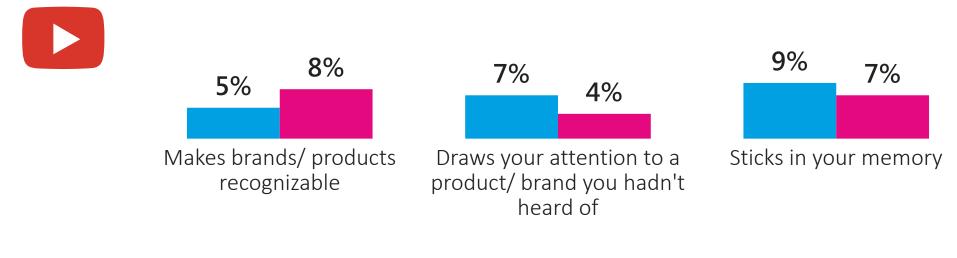
Industry Professionals



YouTube advertising effectiveness – similarities and differences between the public and industry



Media Sources on Which You Find Advertising That... YOUTUBE



Canadian Public

Industry Professionals



Looking Forward

Ad industry media consumption appears to be influencing our perceptions of the public's habits. At minimum, we as an industry need to be thinking about adjusting our marketing and media plans with the Canadian public in mind. At best, there is a need for some level setting and training.

Looking Forward

- As an industry, we over estimate the public's digital content media consumption.
- While the industry watches less broadcast television than the public, we enjoy appointment viewing for the same reasons as the public.
- Like many Canadians, we believe that one is 'most likely' (vis-à-vis other media) to find advertising that makes brands/products more recognizable, and that stick in memory, on TV.
- Moreover, the industry is far more likely than the public to cite social media as the medium where they are 'most likely' to find advertising that makes brands recognizable, sticky and attention drawing.
- The public and the industry love live TV. They look forward to watching their favourite shows, on TV. They want to see the action as it happens, hate spoilers and can't wait to talk about TV with their friends and family.



WITH THANKS

CANADIAN MARKETING ASSOCIATION









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THANK YOU