

Two Nations and Their Perceptions of Media Habits

Research Objectives:

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”

context

Context Item #1 – News about TV is alarming



Canadians watching less traditional TV, more streaming services like Netflix, CRTC says

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

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

Canadians Watching More Mobile Video, Less Cable TV Than Ever Before



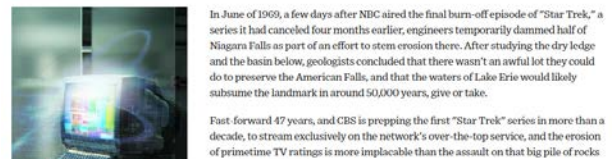
Future of TV Consumption, by Jonah Guo 2,153



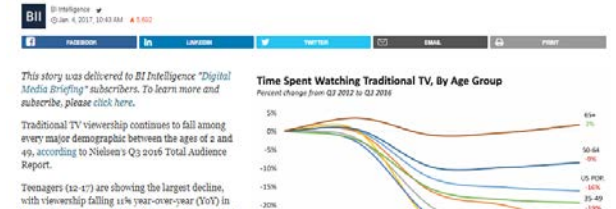
BIV: CRTC report show Canadians watching less TV

WHERE TV RATINGS GO FROM HERE

Audiences Are Down, Down, Down, According to Nielsen
By Anthony Coppa Published on April 16, 2016



Traditional TV's demographic woes get worse



The number of people watching TV is falling off a cliff

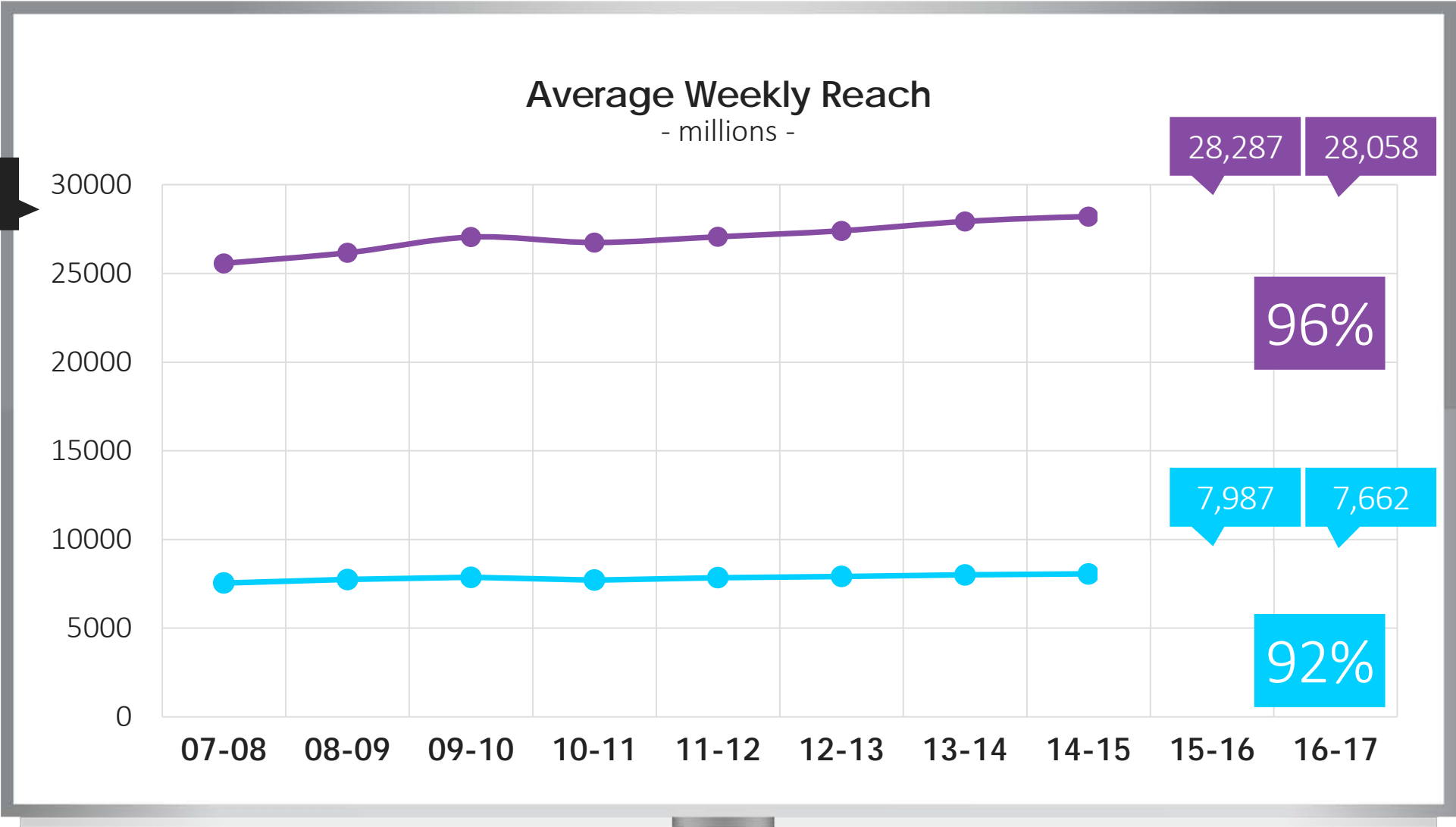
Myles Udland
Sep 23, 2015, 3:12 PM 34,579
Facebook LinkedIn Twitter Email Print

- Most Beautiful Cat Breeds in the World (fengshu.com)
- Your Never Guess What Adrian From Rocky... (All ThingsCable.com)
- How Intel & Partners Are Helping Companies... (fengshu.com)
- Bill Goldberg's Car Is Far From What You'd... (fengshu.com)

Context Item #2 – yet TV viewing numbers are massive

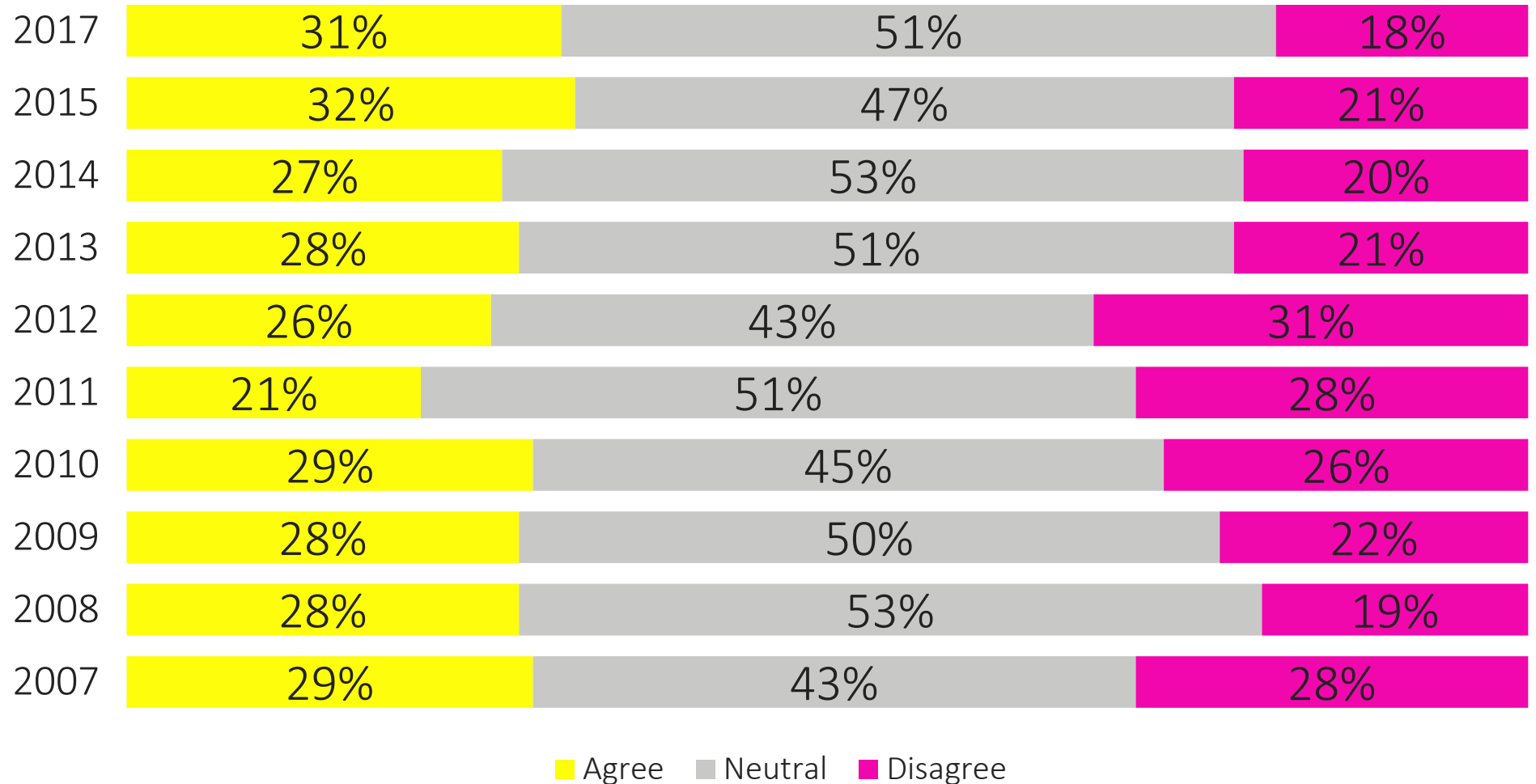
POPULATION

- 18+
- 18-34



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



Context Item #4 – about US and THEM.

US



and them.

We – the advertising industry – are Ontario / GTA centric

Context Item #4 – about US and THEM.

US

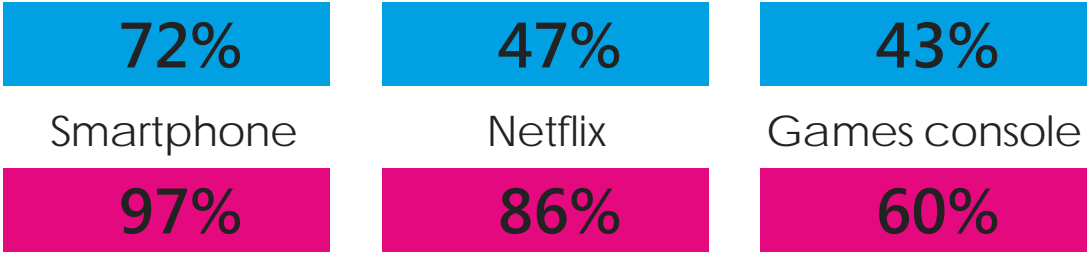


and them.

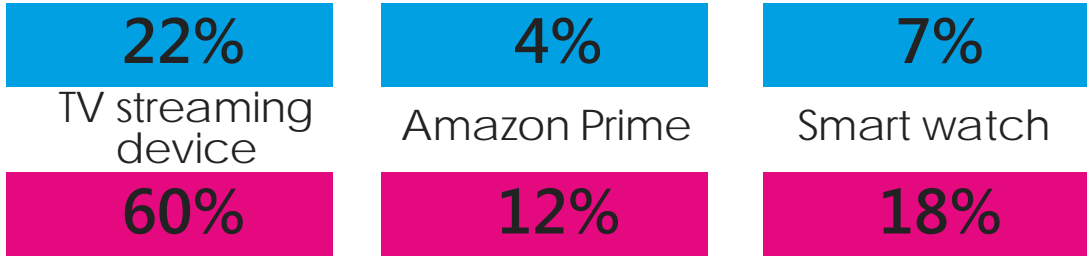
We are younger than the general population

Context Item #4 – about US and THEM.

US



more



and them.

We have more stuff

Public Industry



Them (Canadian Public)



Three summary points

1.

TV viewing “on a television” continues to be pervasive.

2.

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

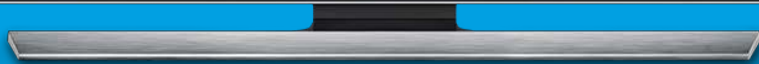
3.

Opportunity to improve the public’s trust in advertising.



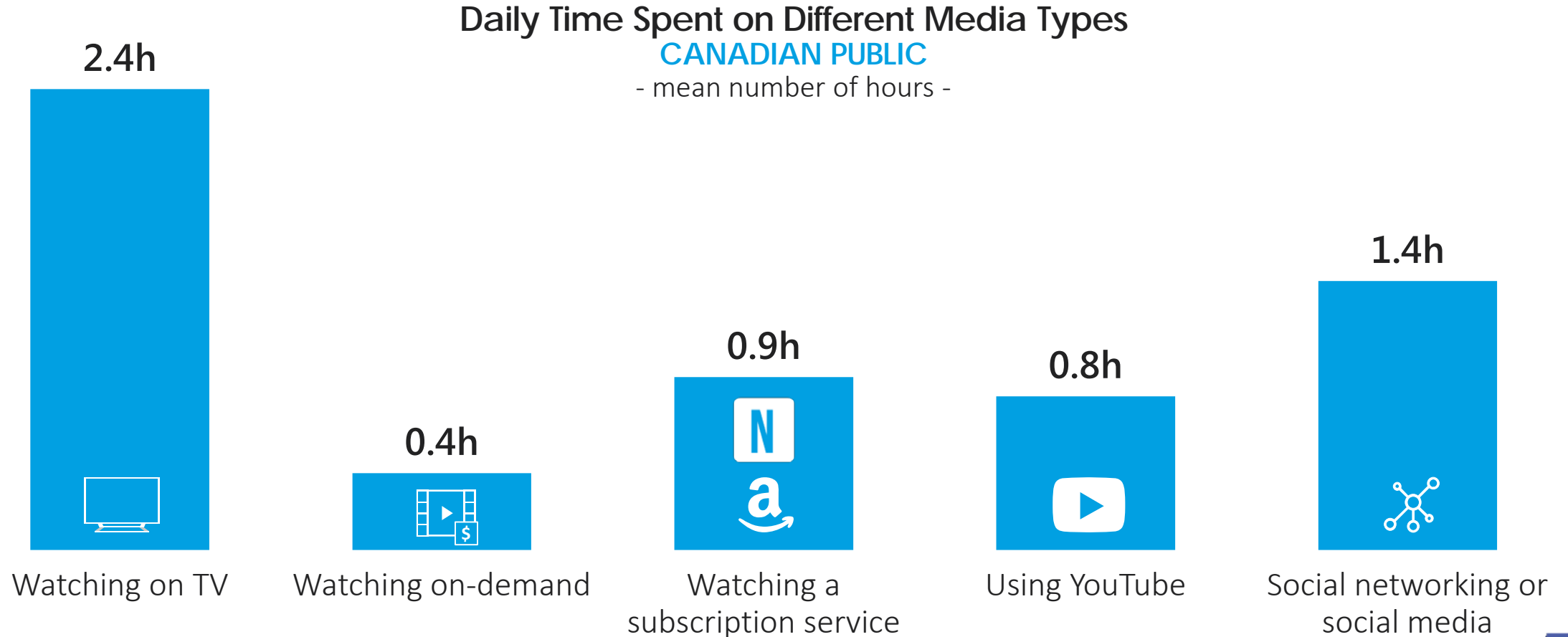
1.

TV viewing “on a television”
continues to be pervasive.



Canadians are engaged with TV – it remains pervasive

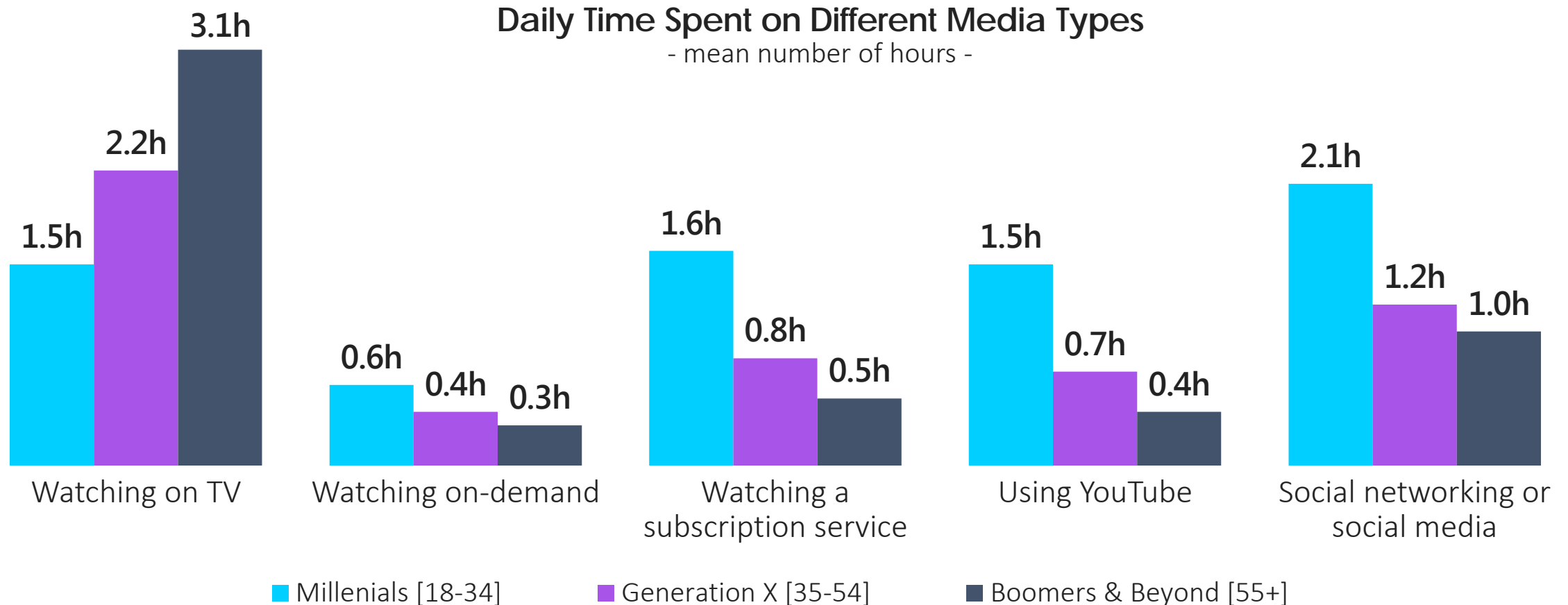
NOTE: estimates here are self-reported; actual TV viewing best reported via Numeris passive data



Millennials are multi media viewing hogs – they do not discriminate

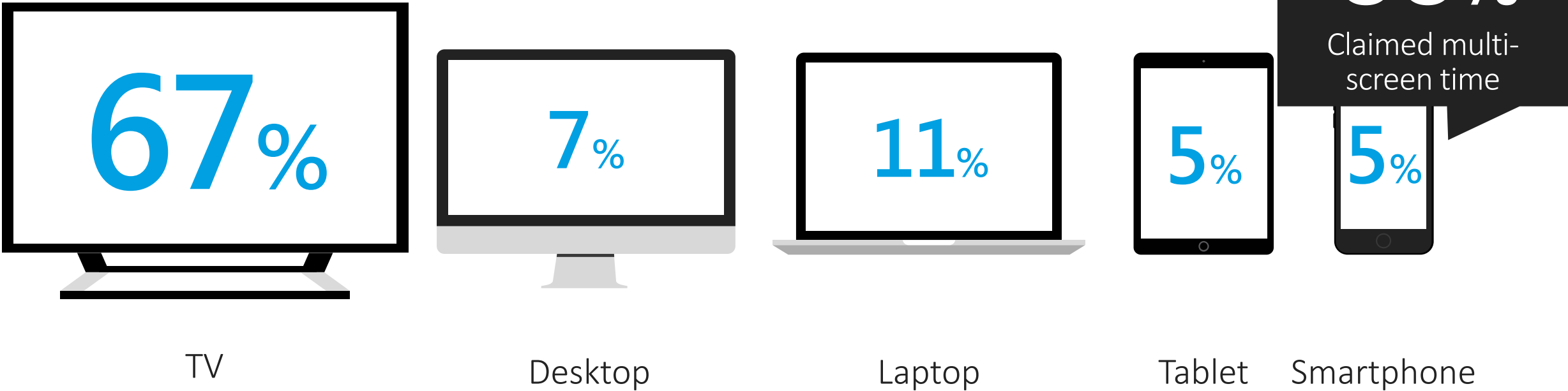
NOTE: estimates here are self-reported; actual TV viewing best reported via Numeris passive data

think^{tv}



TV is the primary device of choice for viewing broadcast television

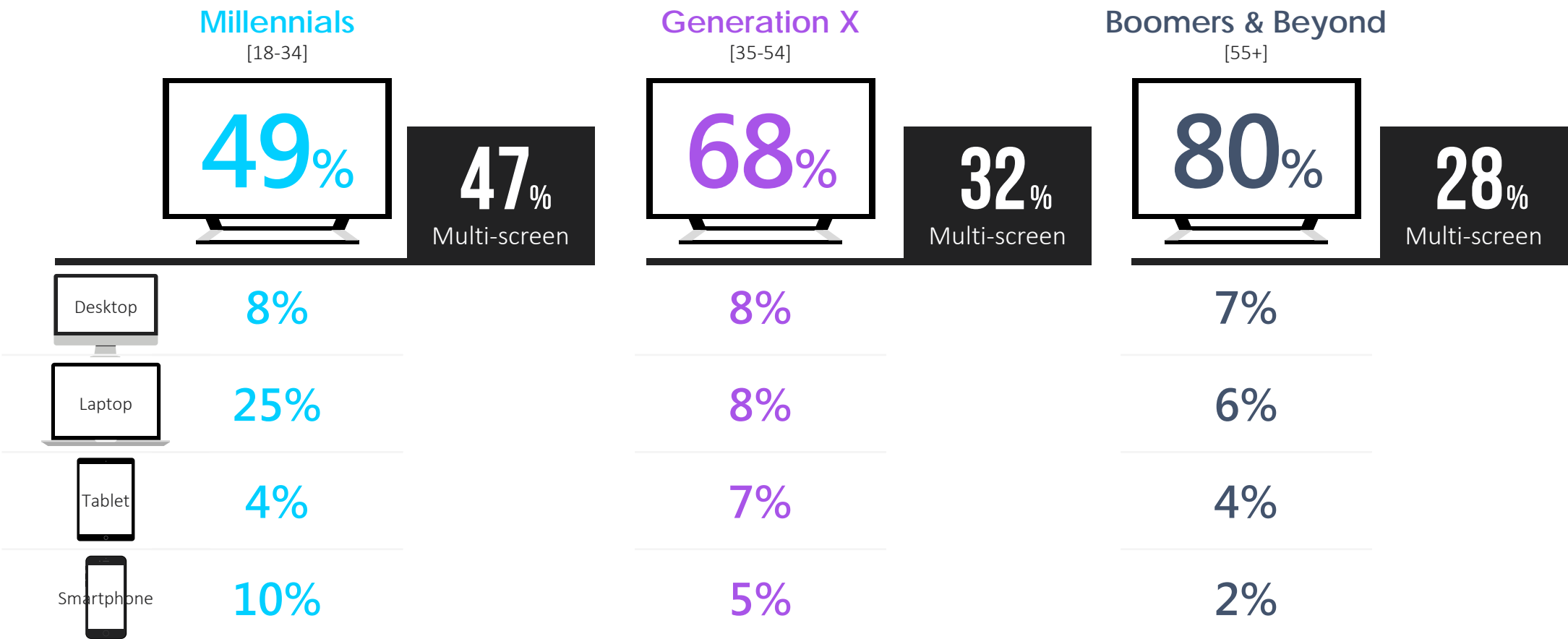
Where TV/ Movies are Watched
CANADIAN PUBLIC
- mean % of time -



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

Where TV/ Movies are Watched
- mean % of time-

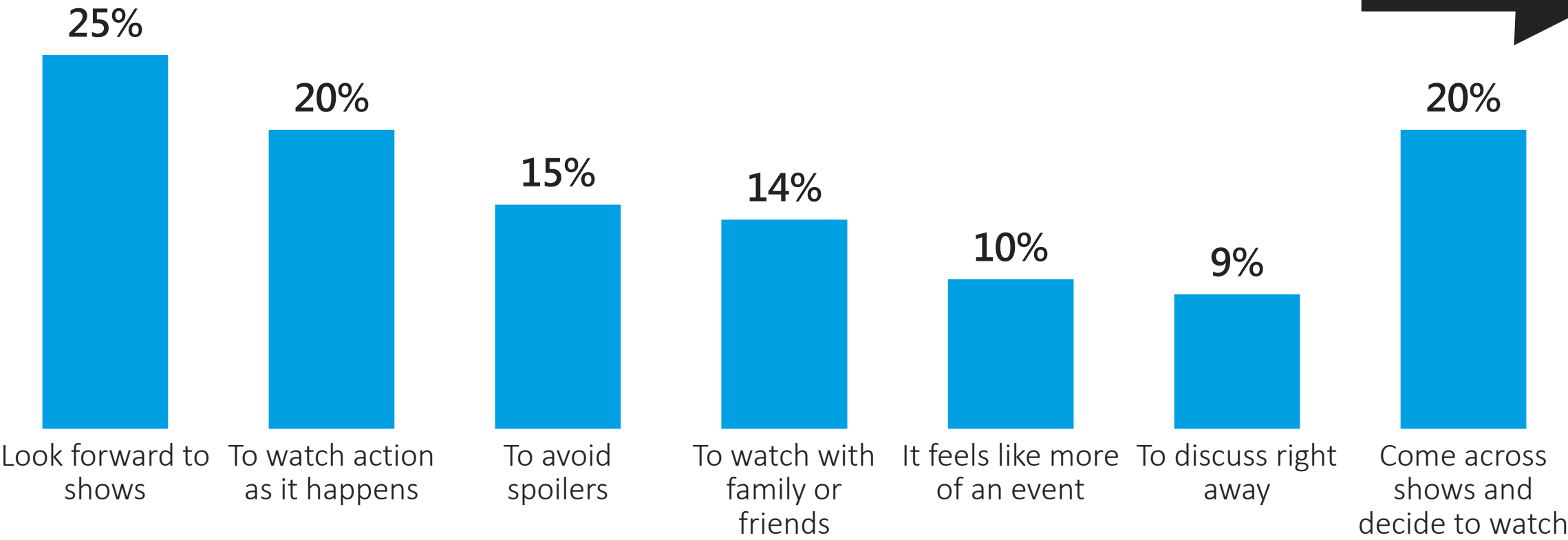


Of the time you spend watching TV shows or movies (excluding DVDs or shows from a subscription on-demand service like Netflix or Amazon), what percentage of that time is spent watching on a...?
When watching TV, for what percentage of time do you think you use another device (smartphone, tablet, laptop/PC,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

People enjoy appointment viewing – it is ‘live’ and it is ‘social’

Why do People Watch Live TV?
CANADIAN PUBLIC

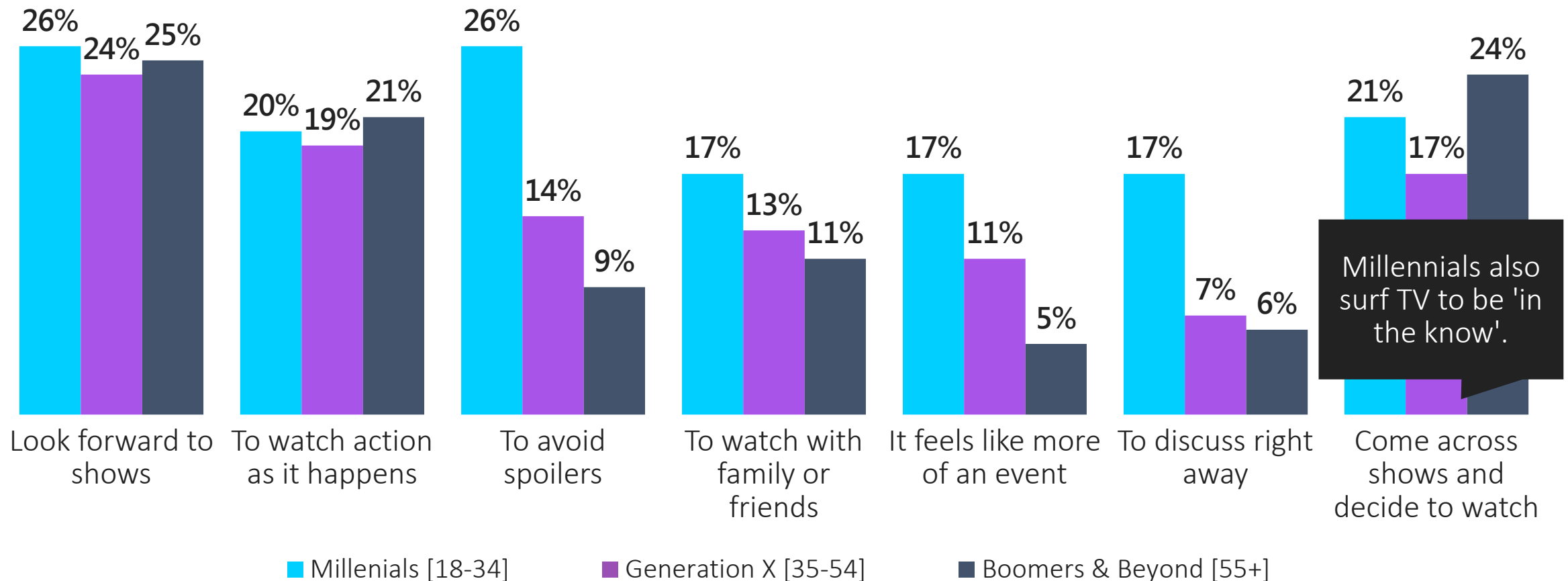
Many people turn to TV to see what’s on.



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?

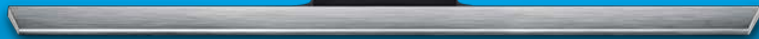
Millennials enjoy appointment viewing because it is 'live' and 'feels like an event'

Why do People Watch Live TV?



2.

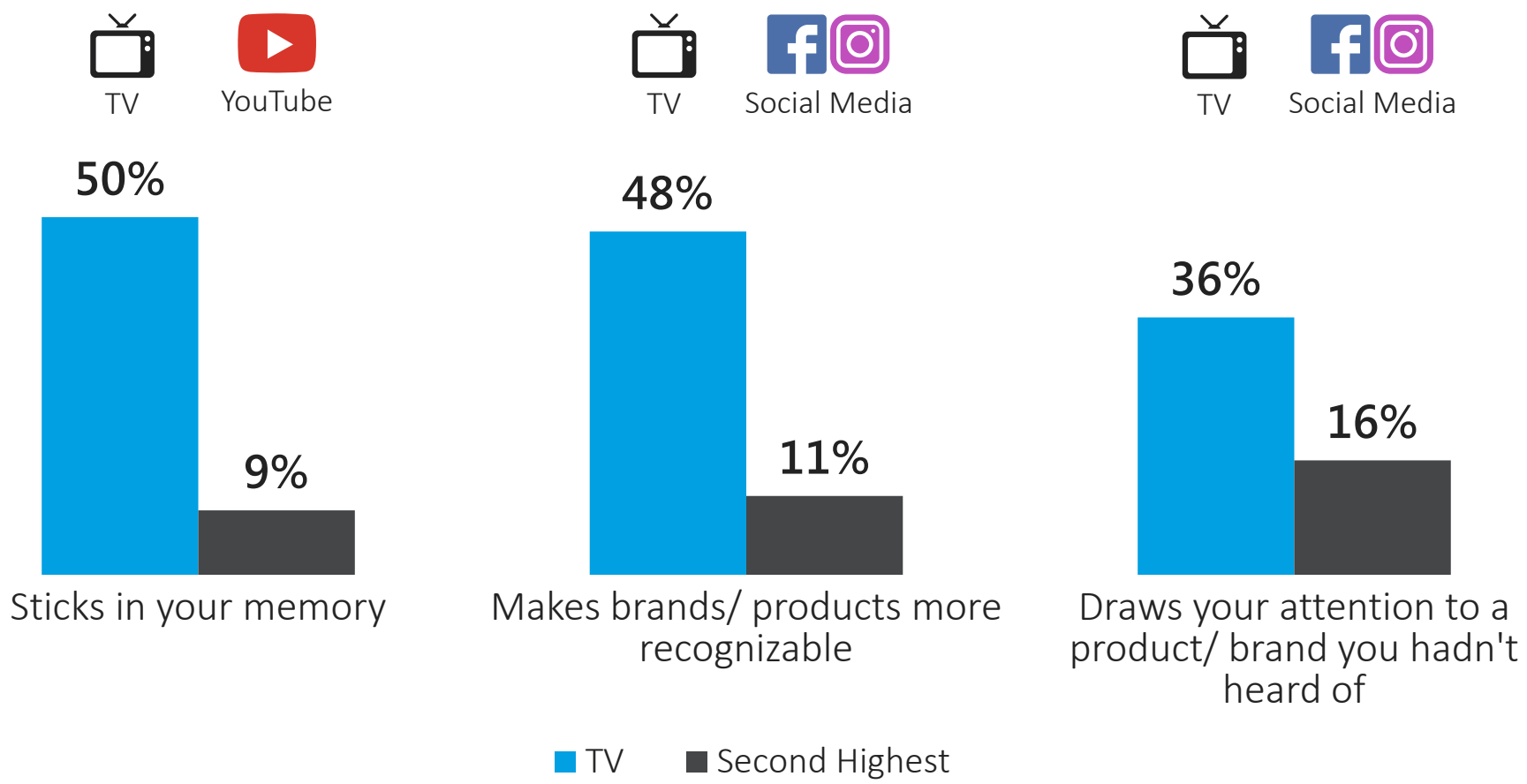
TV advertising is the most
compelling form of
advertising.



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



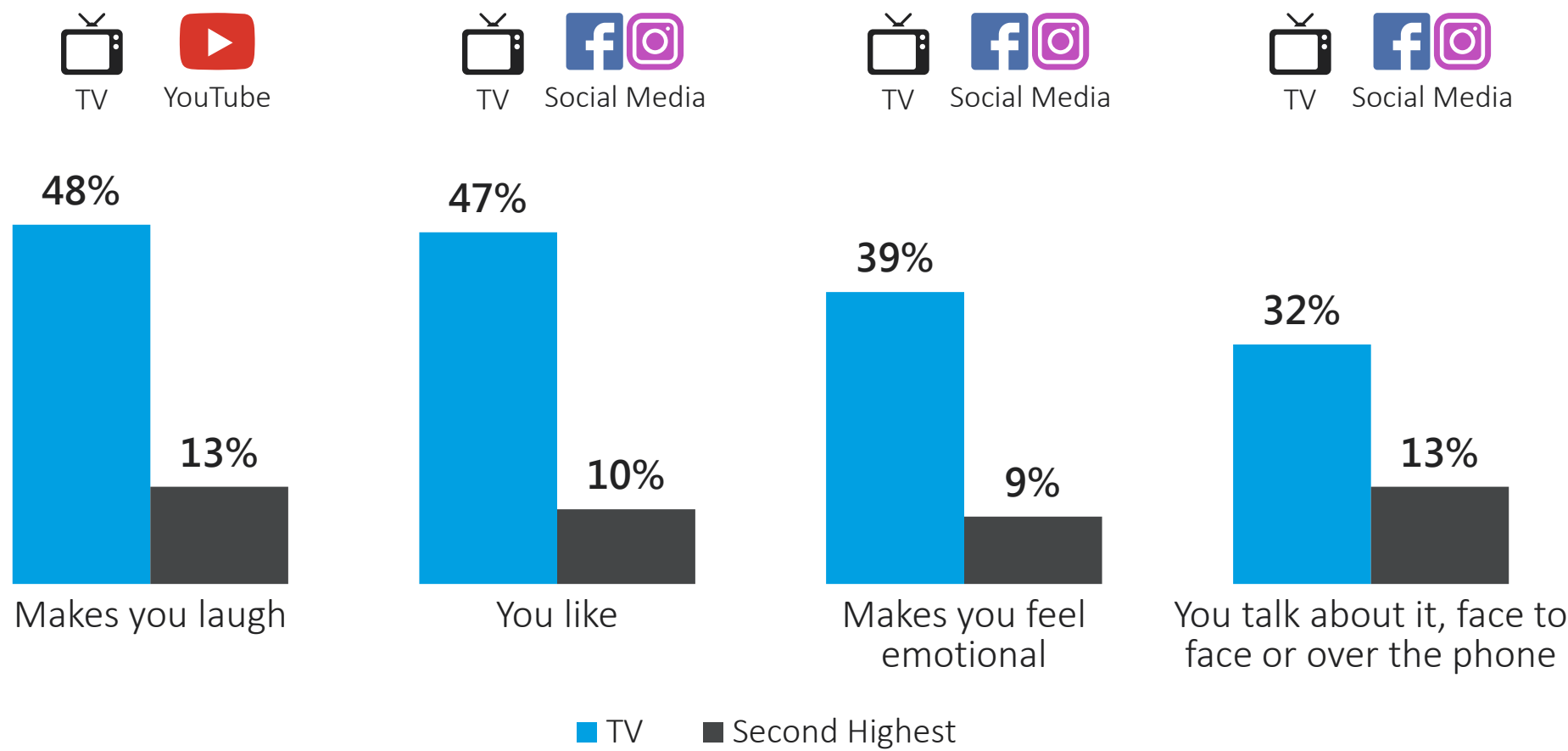
Media Sources on Which You Find Advertising That...
CANADIAN PUBLIC



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

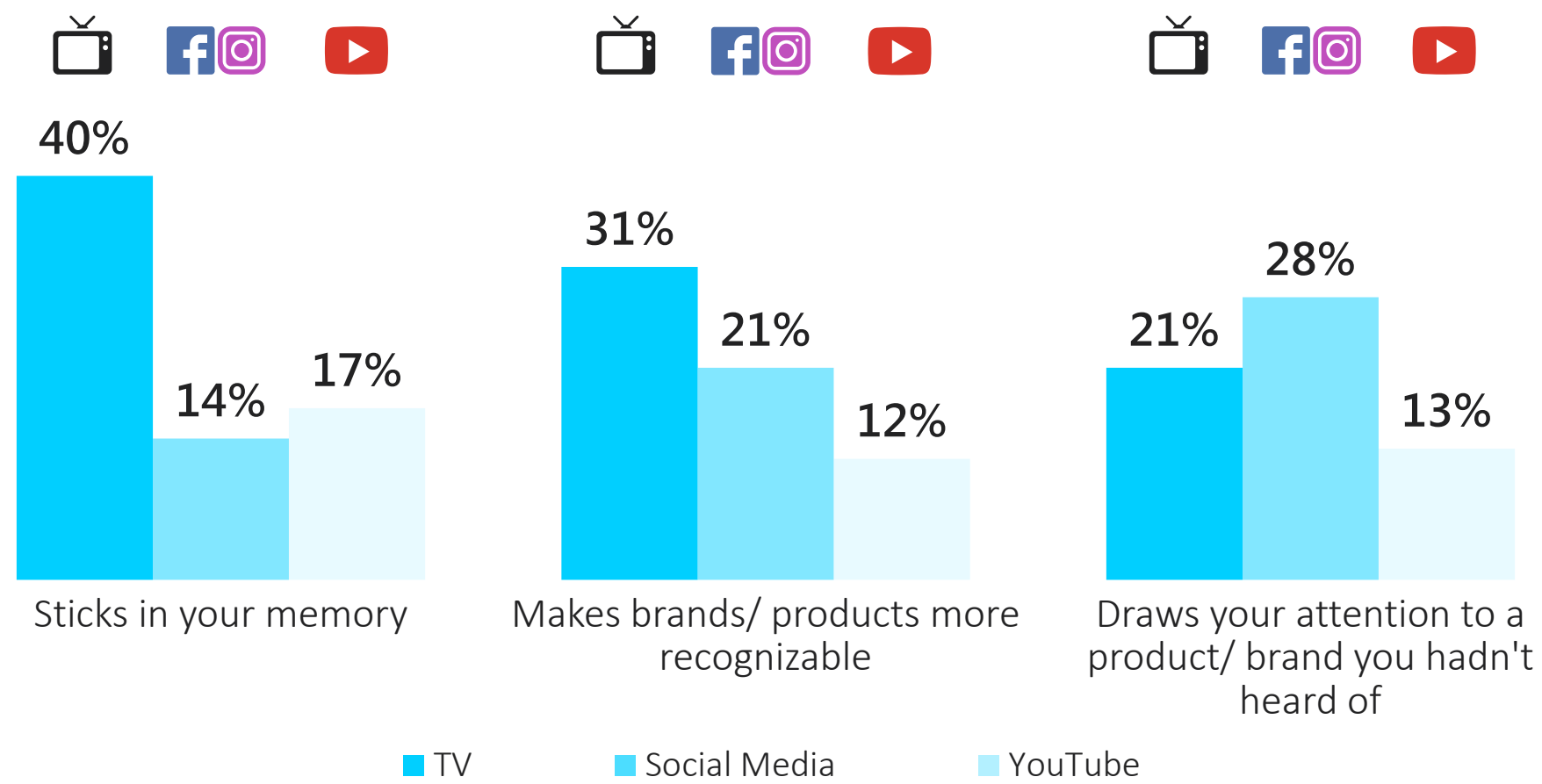
TV advertising is the most likely to generate emotion and conversation

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



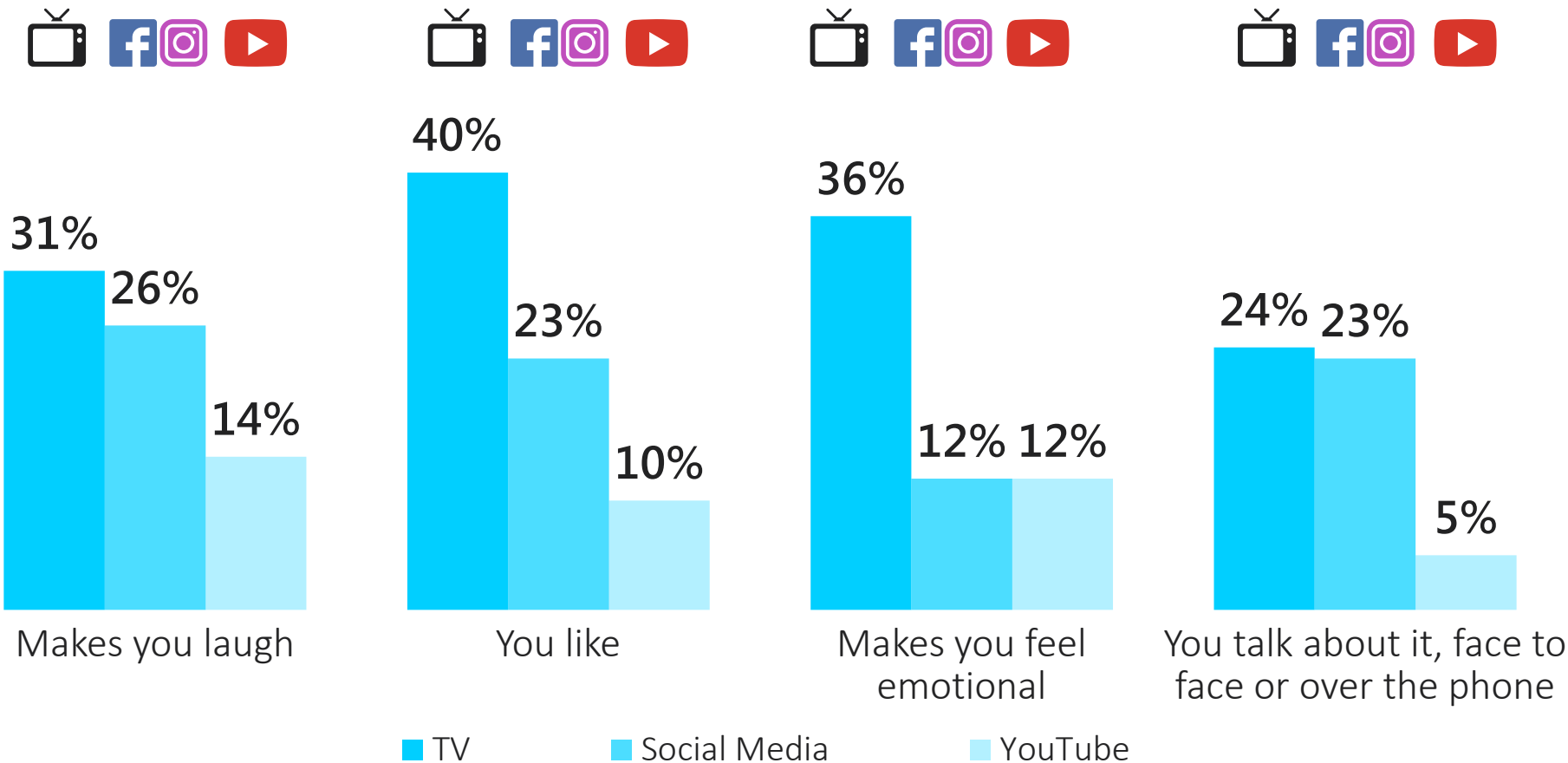
For Millennials TV advertising is the most likely to stick and make brands recognizable

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



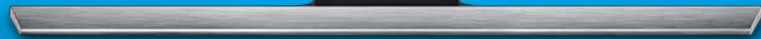
For Millennials TV advertising is the most likely to generate emotion and conversation

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



3.

Opportunity to improve
the public's trust in
advertising.



Who do people trust?

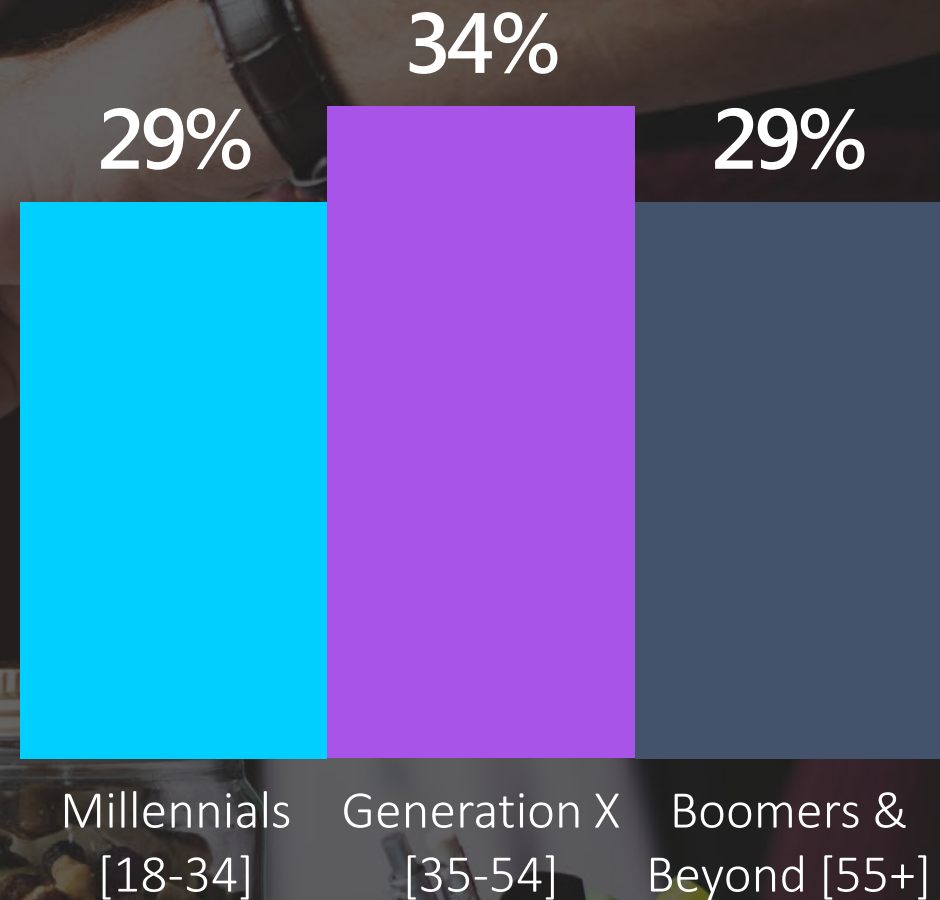
% agree

	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

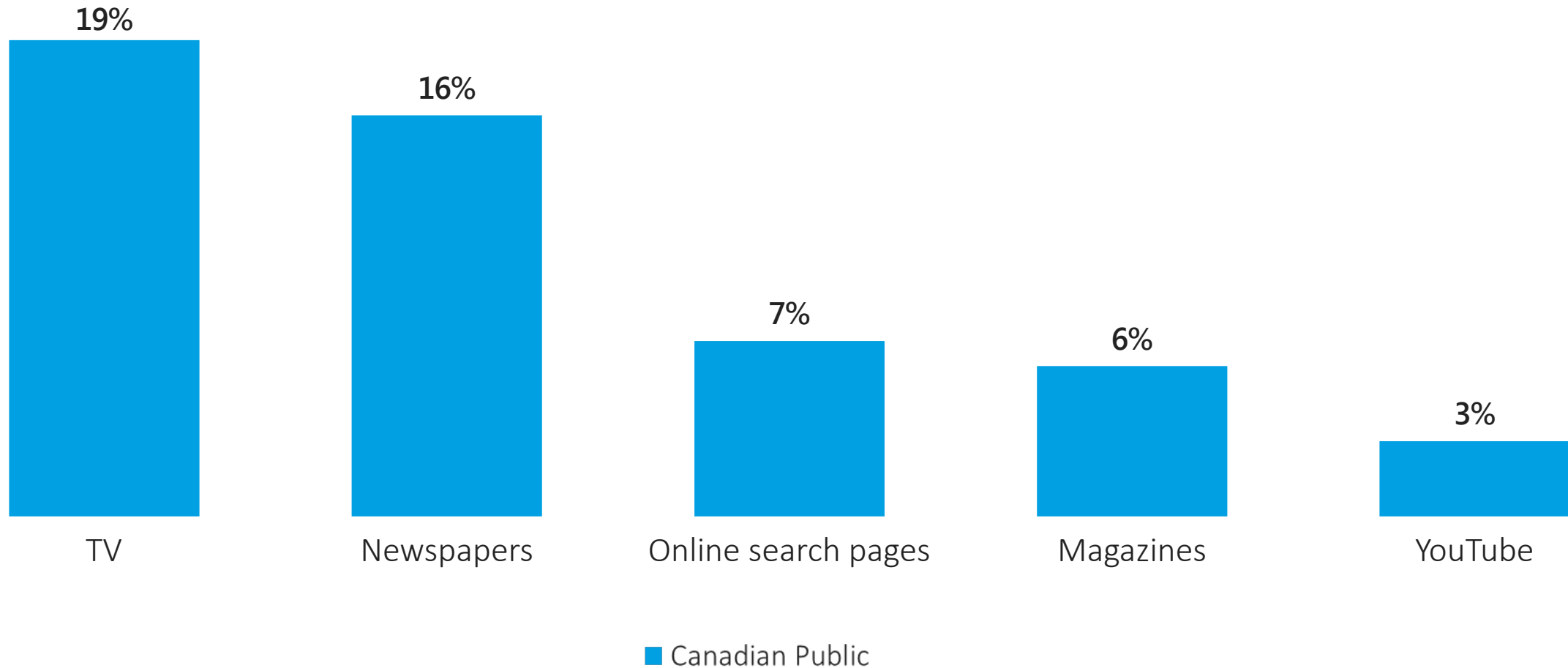
31%

Don't trust advertising in any form of media



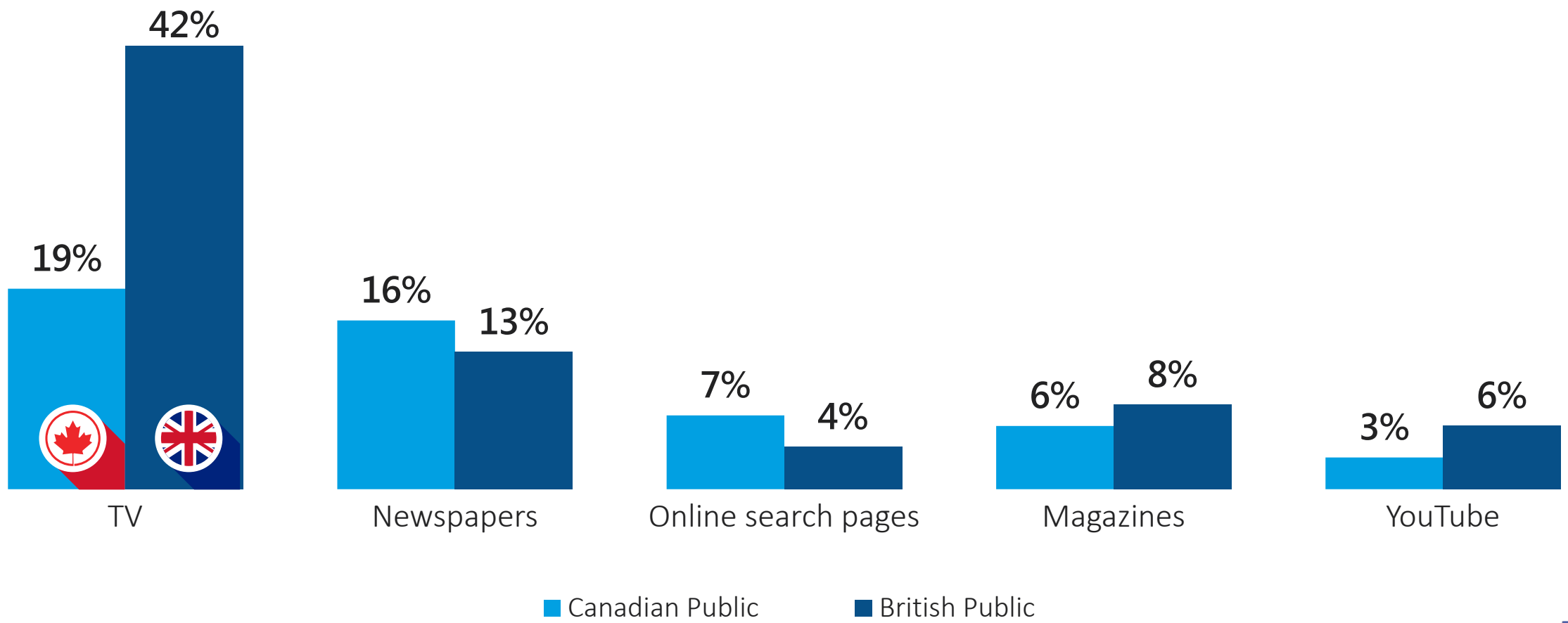
Clear opportunity to improve the public's trust in advertising – across all media

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



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

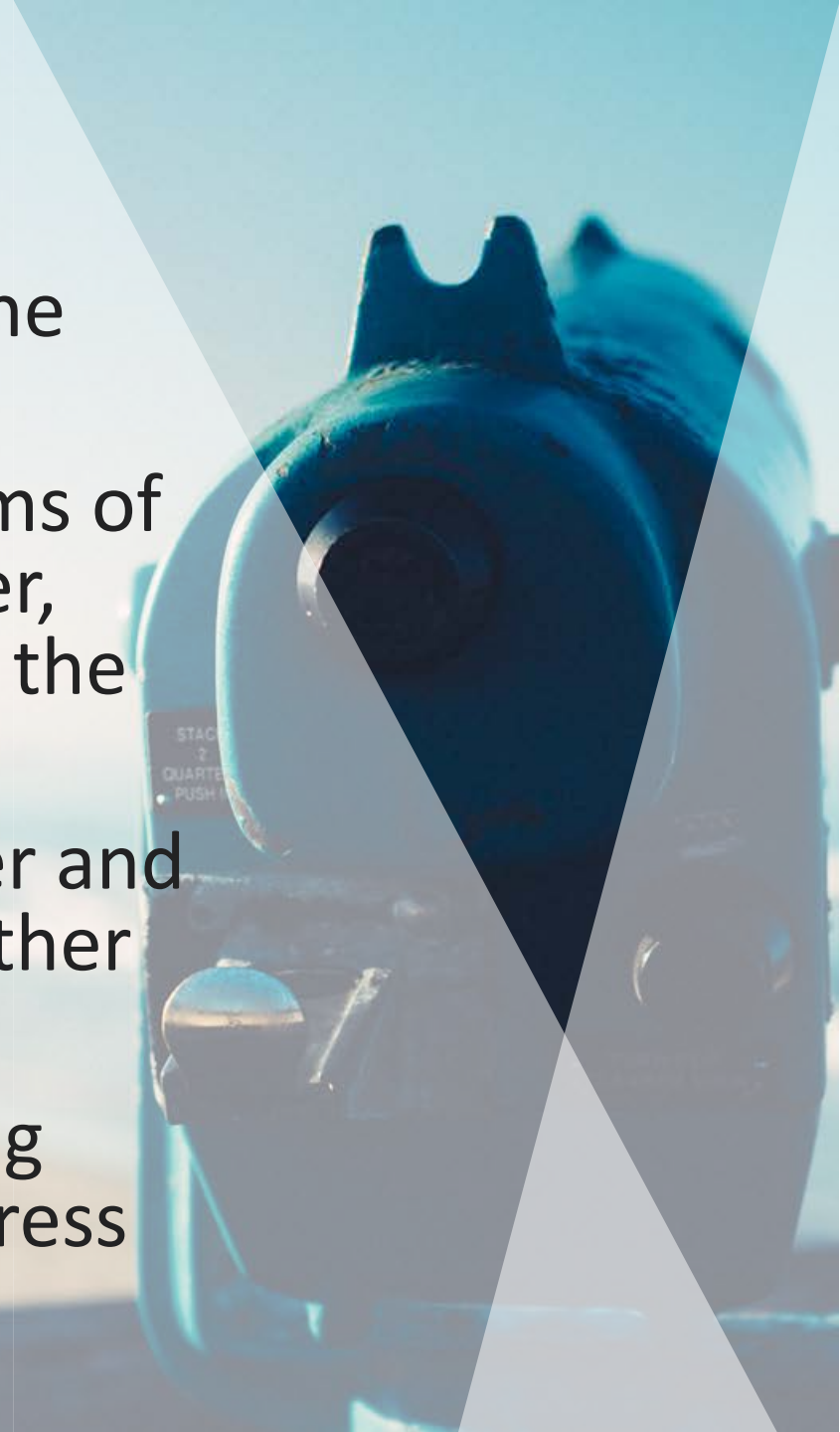
Media Sources on Which You Find Advertising That...
YOU TRUST



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

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 ALL media channels in Canada to address the public's lack of trust.






US (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.

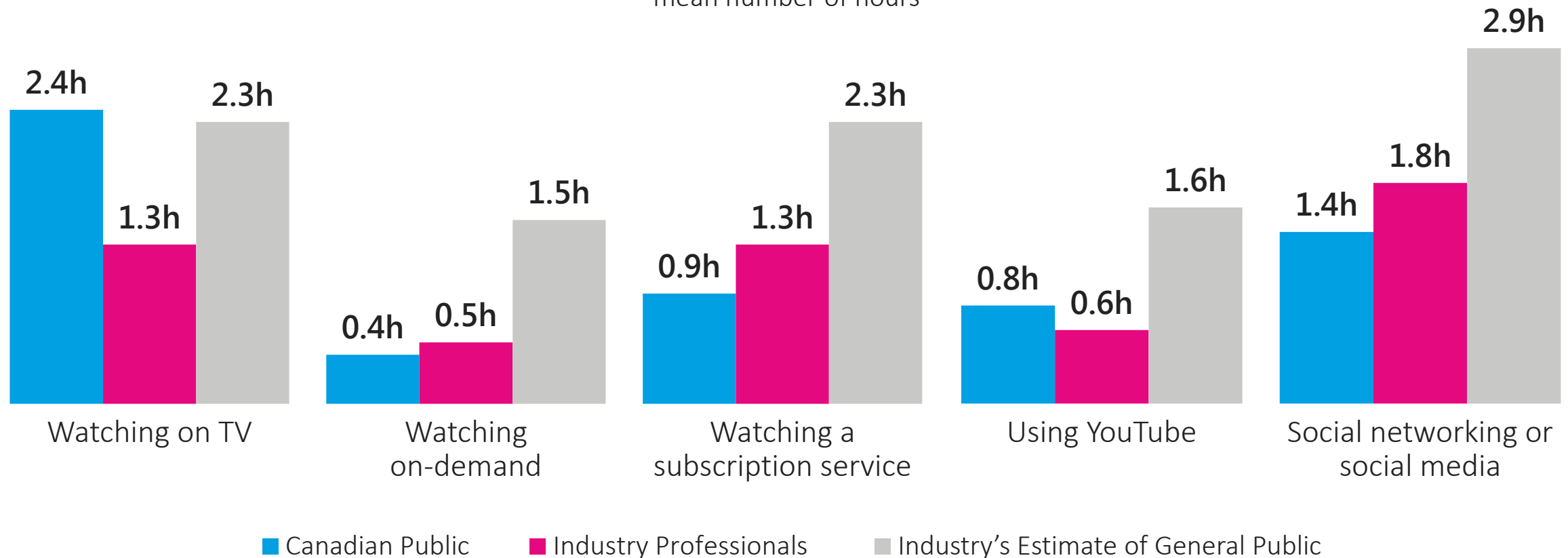


QUESTION FOR US TO CONSIDER
Does this impact our
judgment?

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

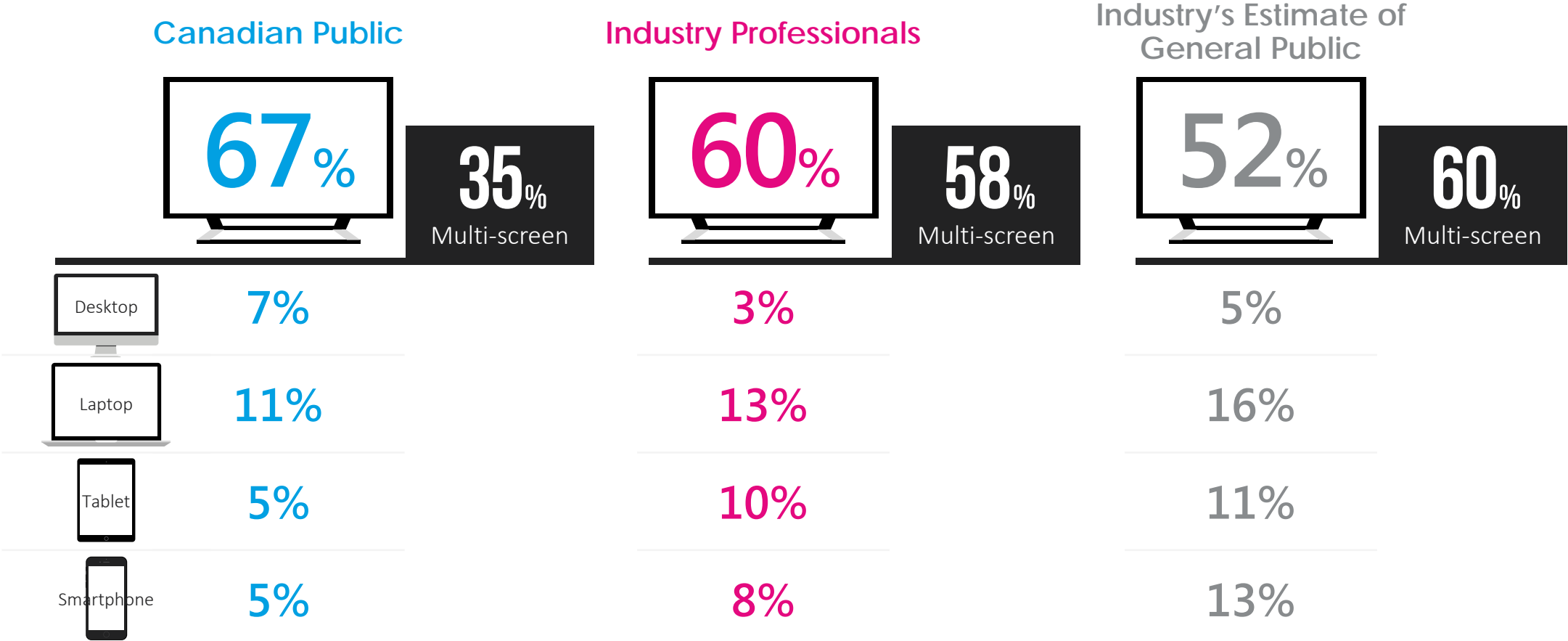
NOTE: estimates here are self-reported; actual TV viewing best reported via Numeris passive data

Daily Time Spent on Different Media Types
- mean number of hours -



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

Where TV/ Movies are Watched
- mean % of time-

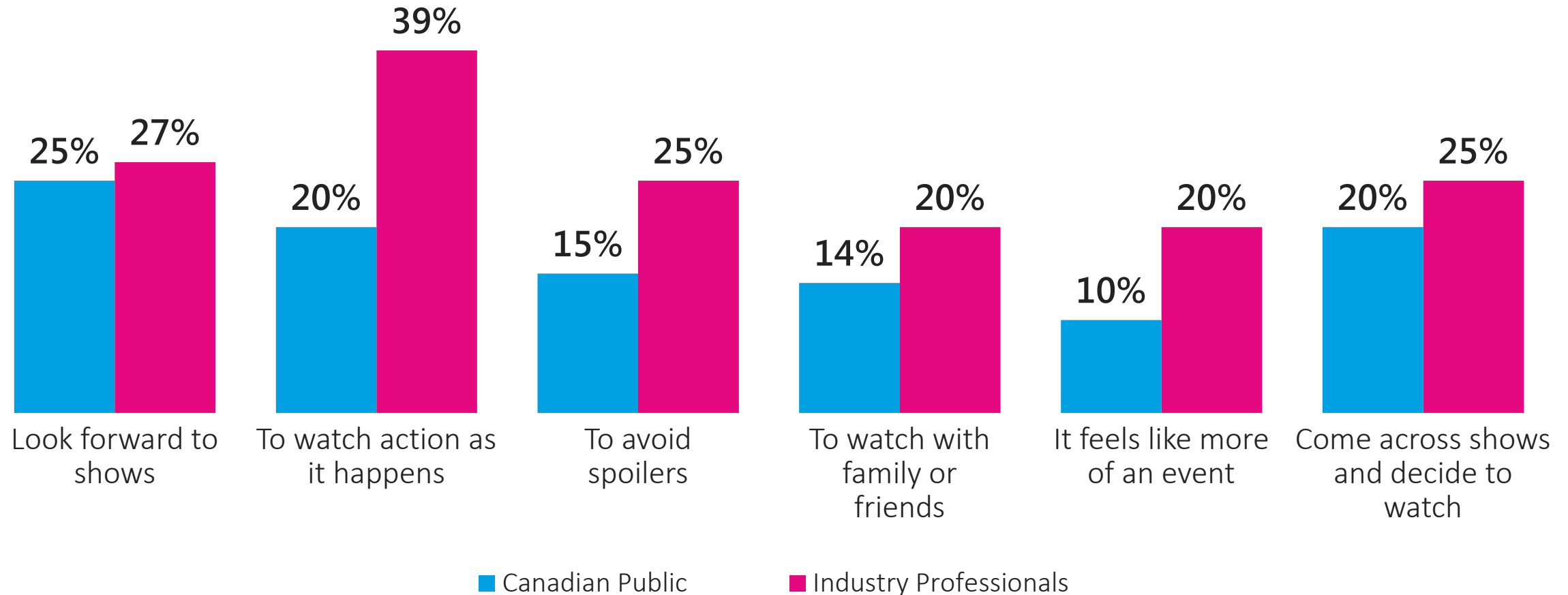


Of the time you spend watching TV shows or movies (excluding DVDs or shows from a subscription on-demand service like Netflix or Amazon), what percentage of that time is spent watching on a...?
When watching TV, for what percentage of time do you think you use another device (smartphone, tablet, laptop/PC,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

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

think^{tv}

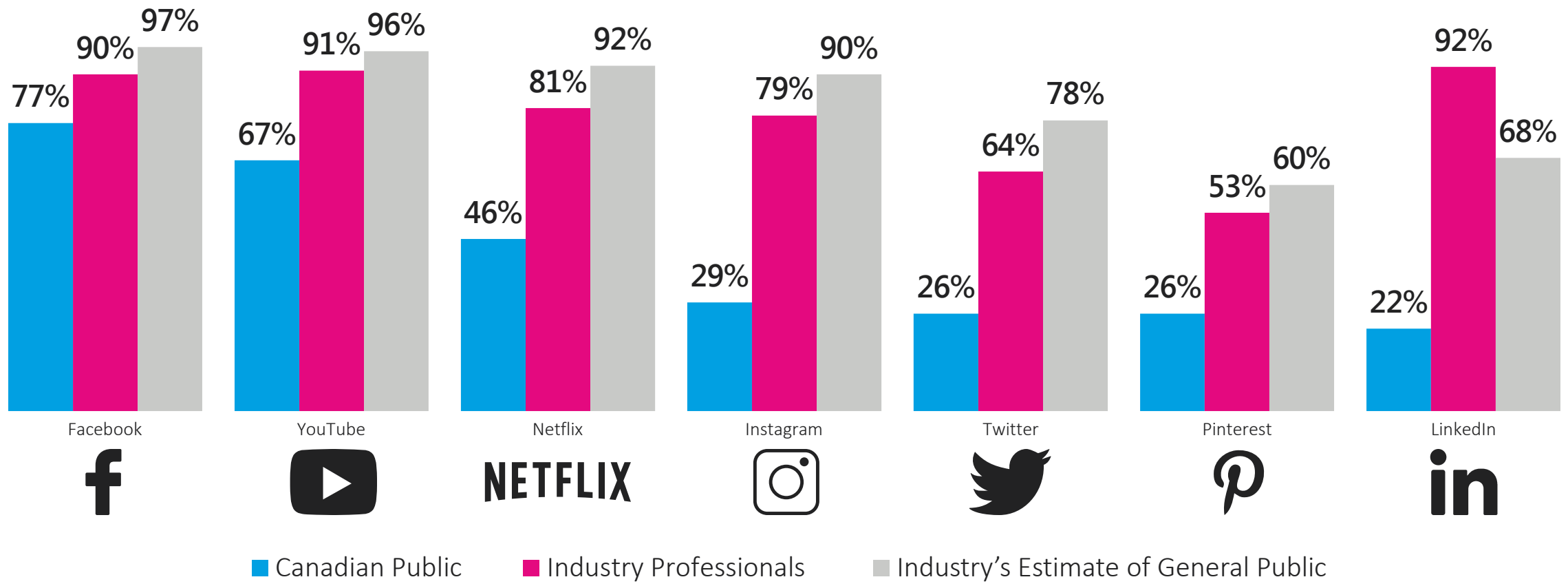
Why do People Watch Live TV?



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



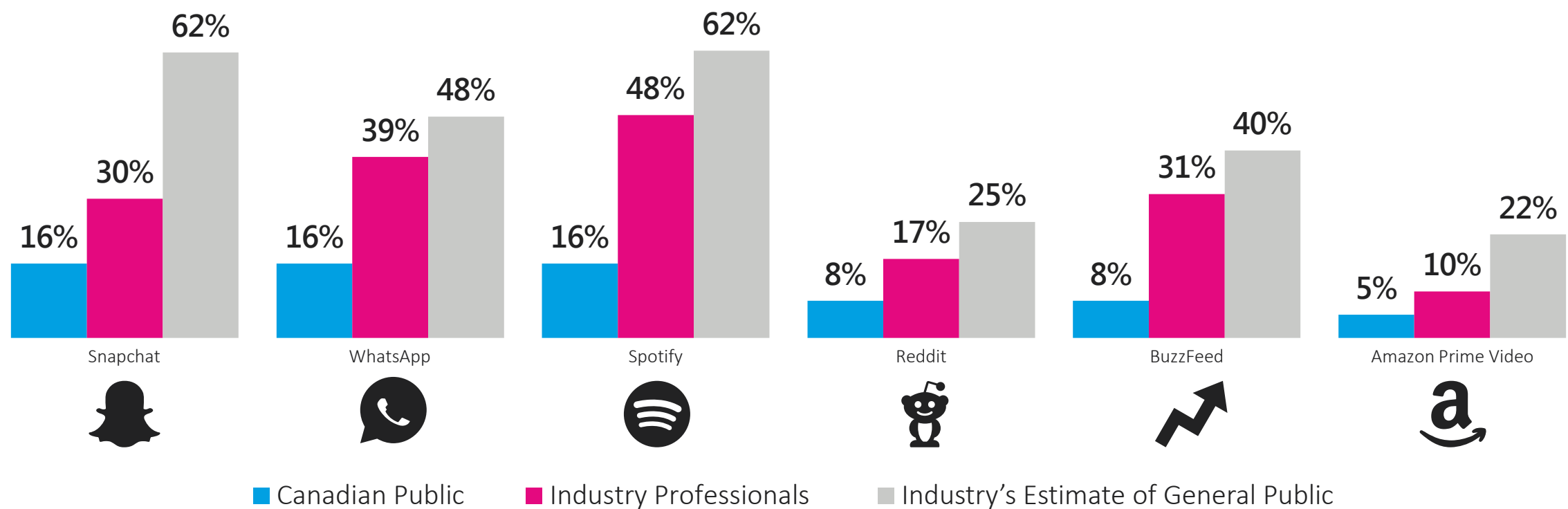
Apps Used in the Last Month



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

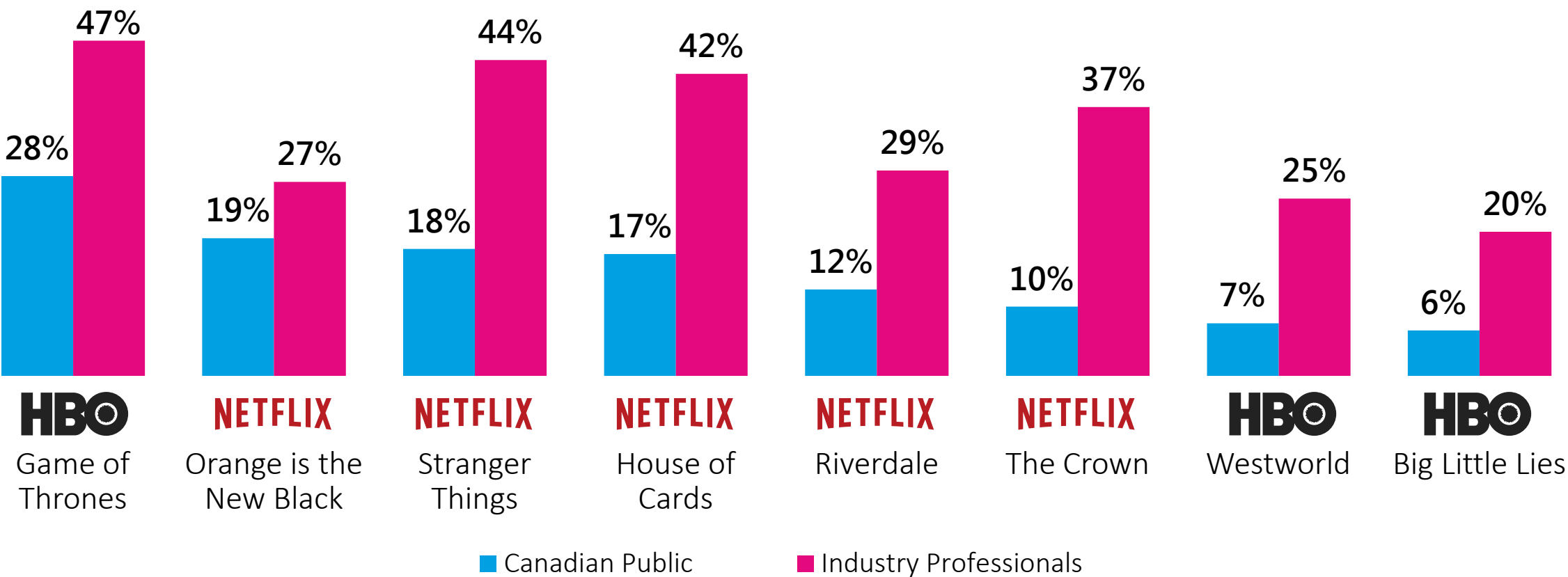
Our lens appears to be colouring what we think Canadians are doing – app usage

Apps Used in the Last Month



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

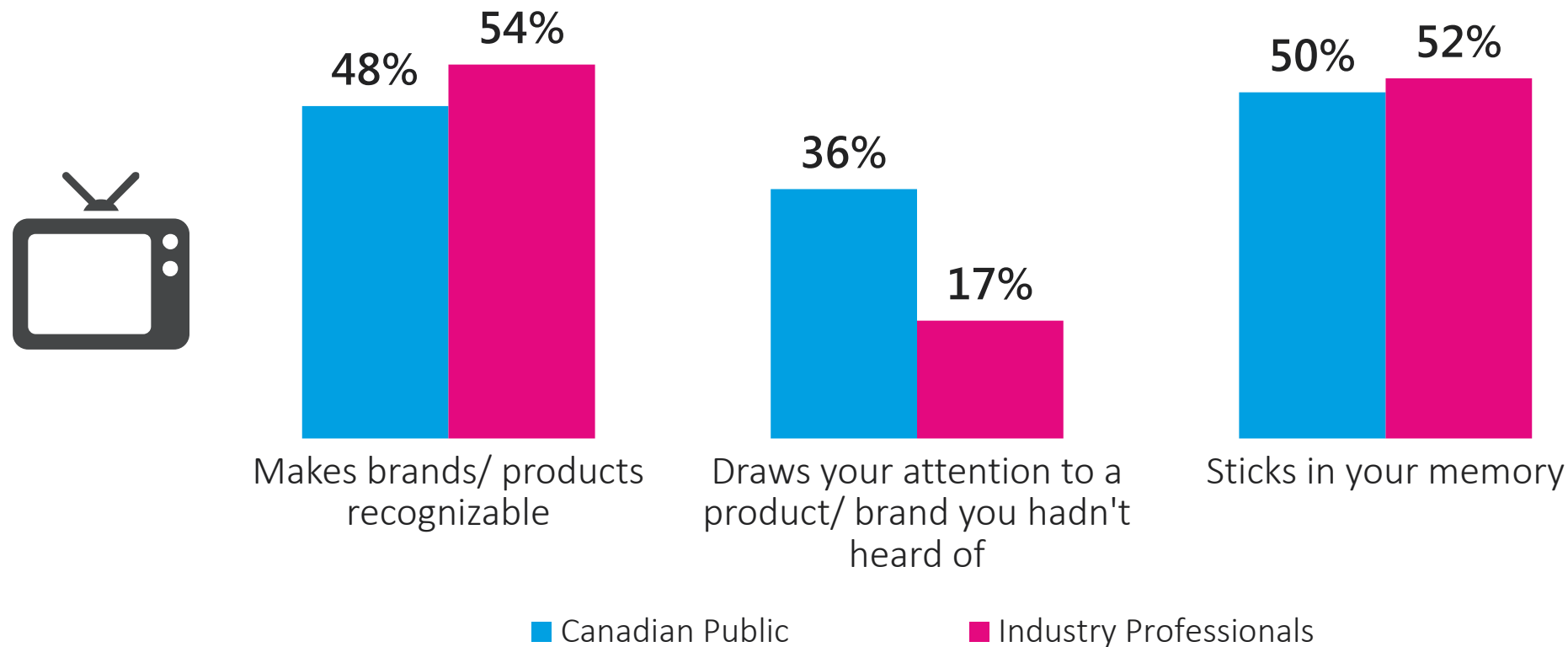
At least One Episode Watched in P6M



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

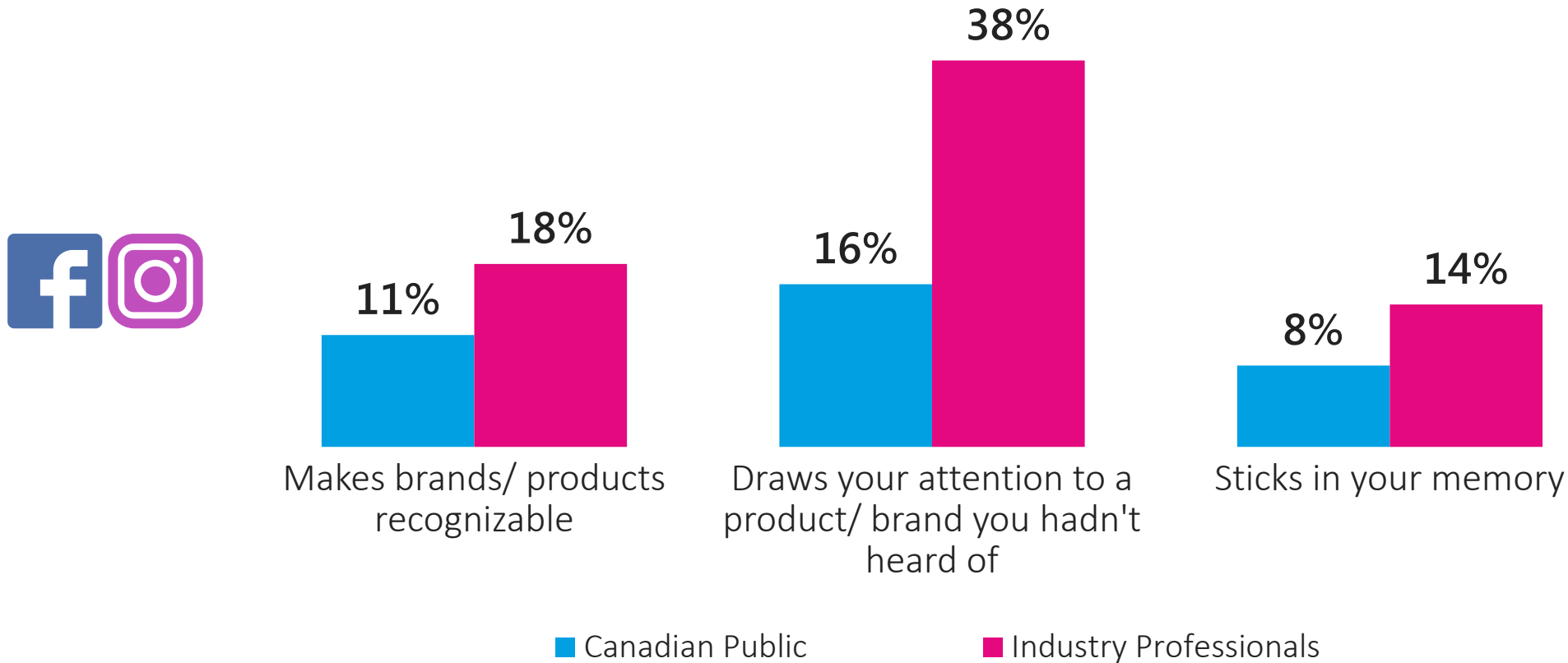
TV advertising effectiveness – similarities and differences between the public and the industry

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



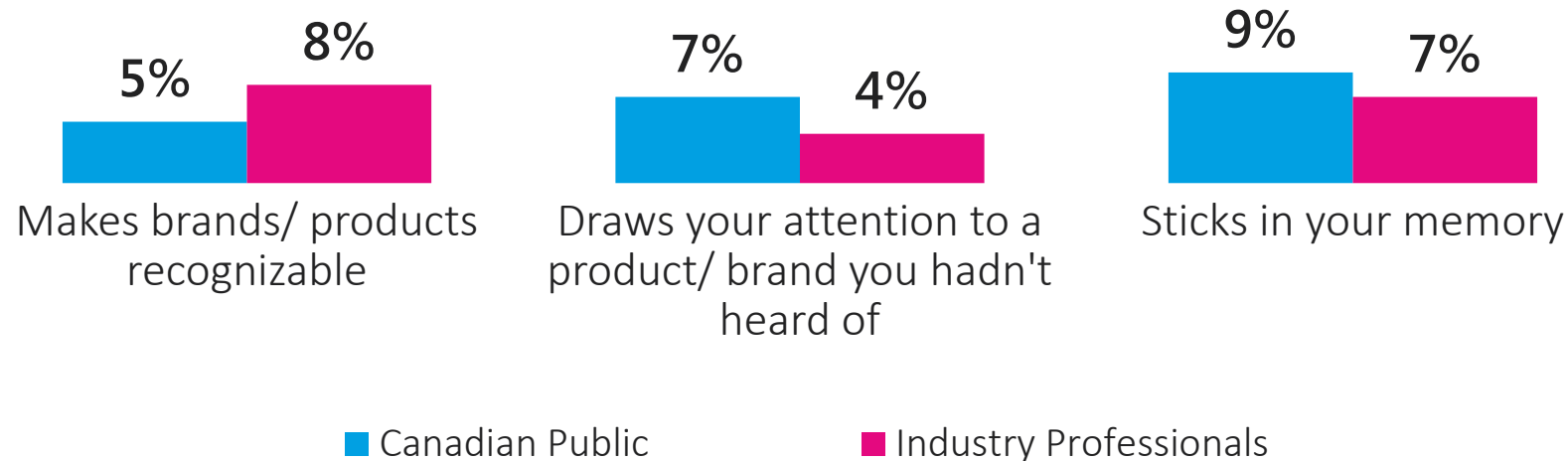
Divergence between the public and the industry on perceptions of advertising using social media

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



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

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



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





Steve Levy

Chief Operating Officer

✉ steve.levy@ipsos.com

📞 +416-324-2107



George Murray

Vice President

✉ george.murray@ipsos.com

📞 +416-572-4473

THANK YOU