



think^{tv}

AD NATION 2020:

CANADIAN & INDUSTRY
PERCEPTIONS OF
ADVERTISING & MEDIA



Thank you to our partners



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

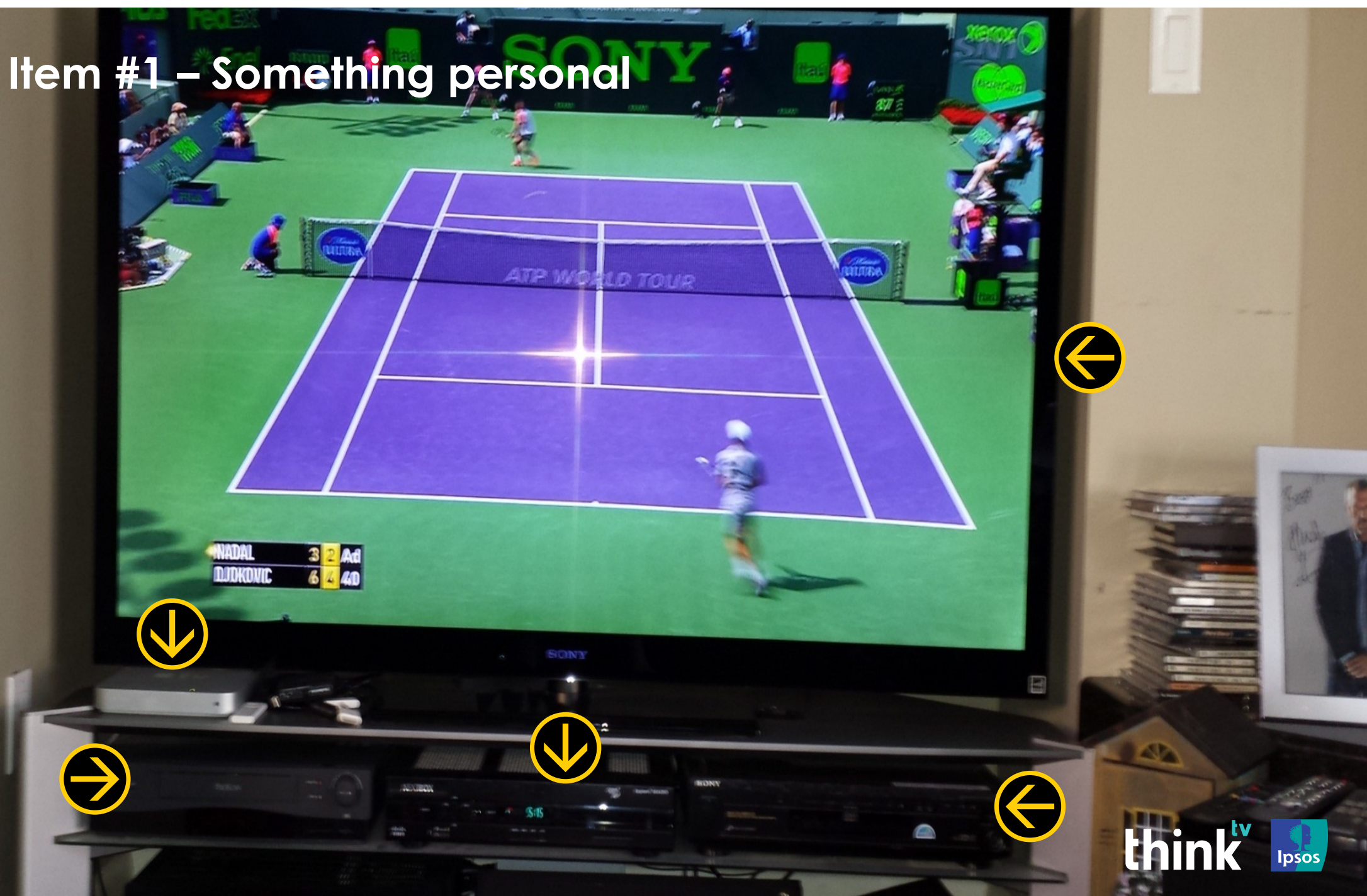
Something
personal

About US
and
THEM

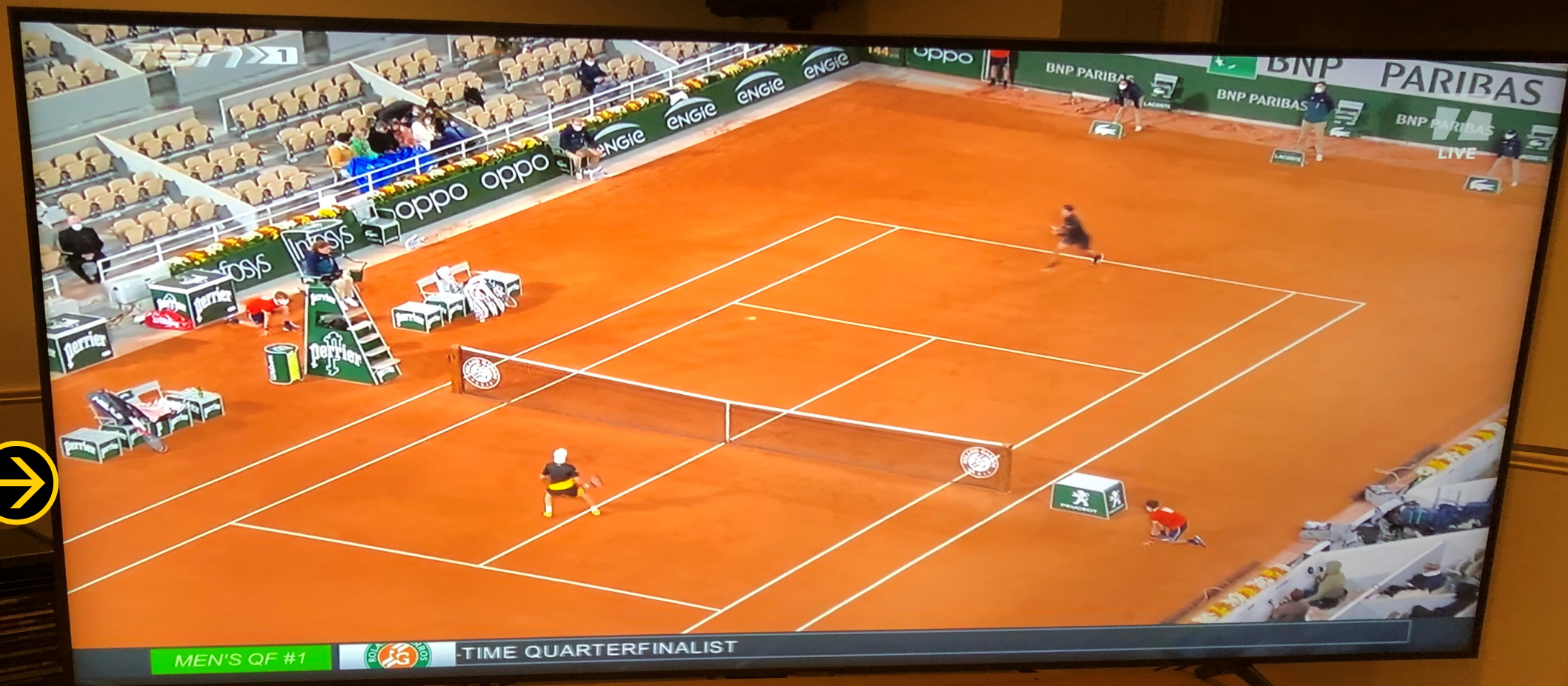
TV
viewing -
clarity

The COVID-
19 context

Context Item #1 – Something personal

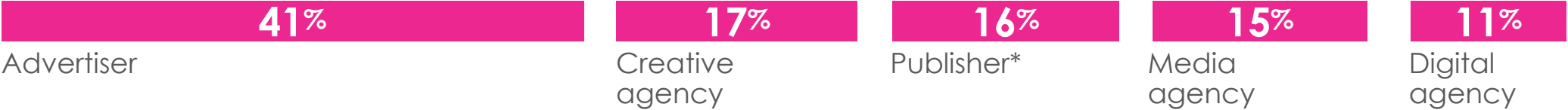
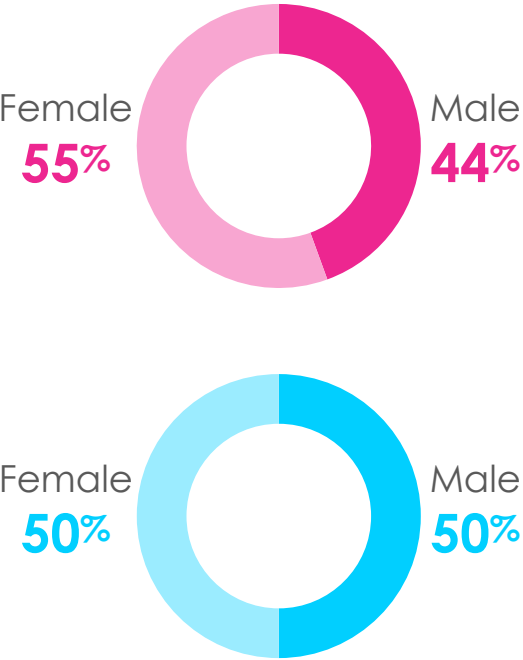
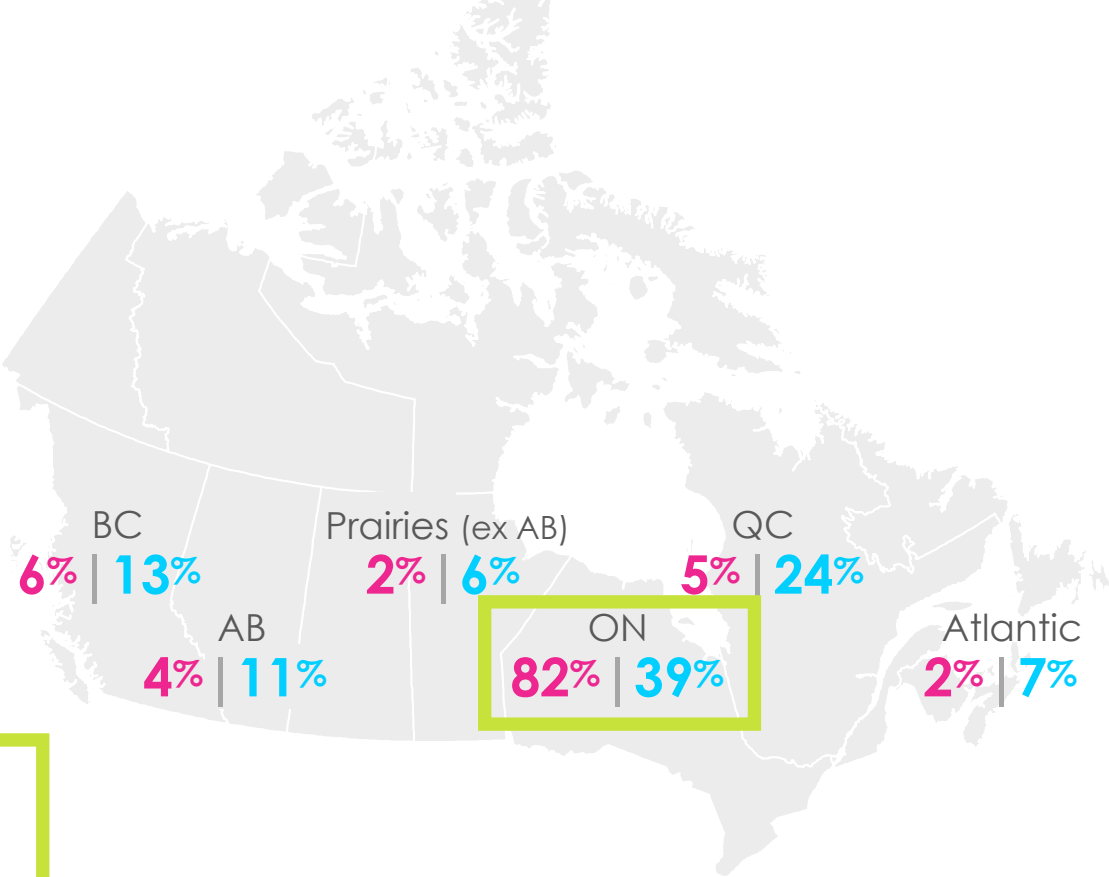
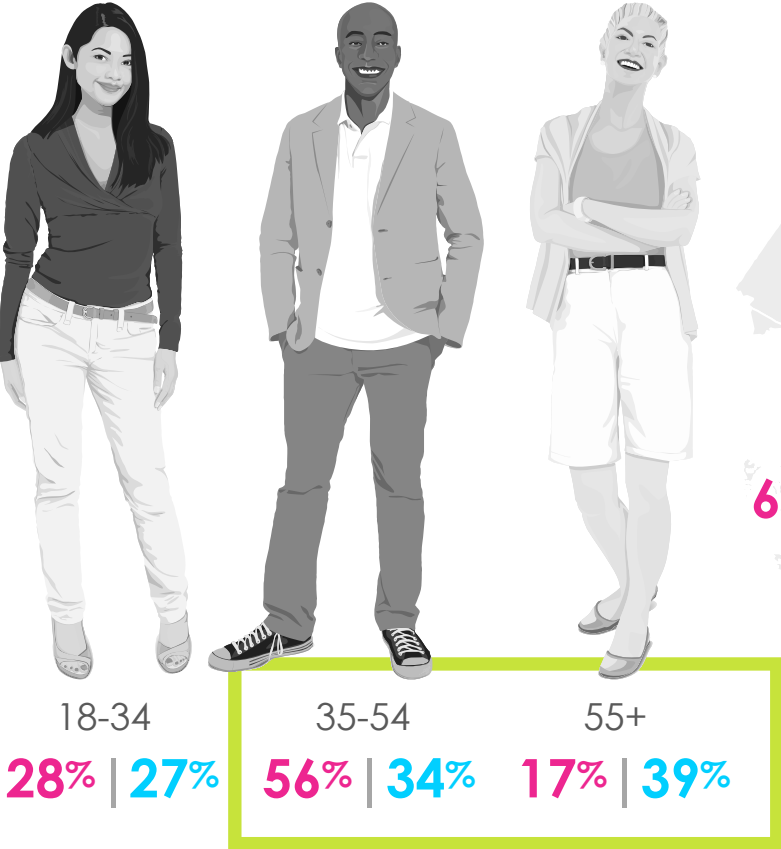








Context Item #2 – About **US** and **THEM**



* Publishers include TV, print, radio, Google, etc.

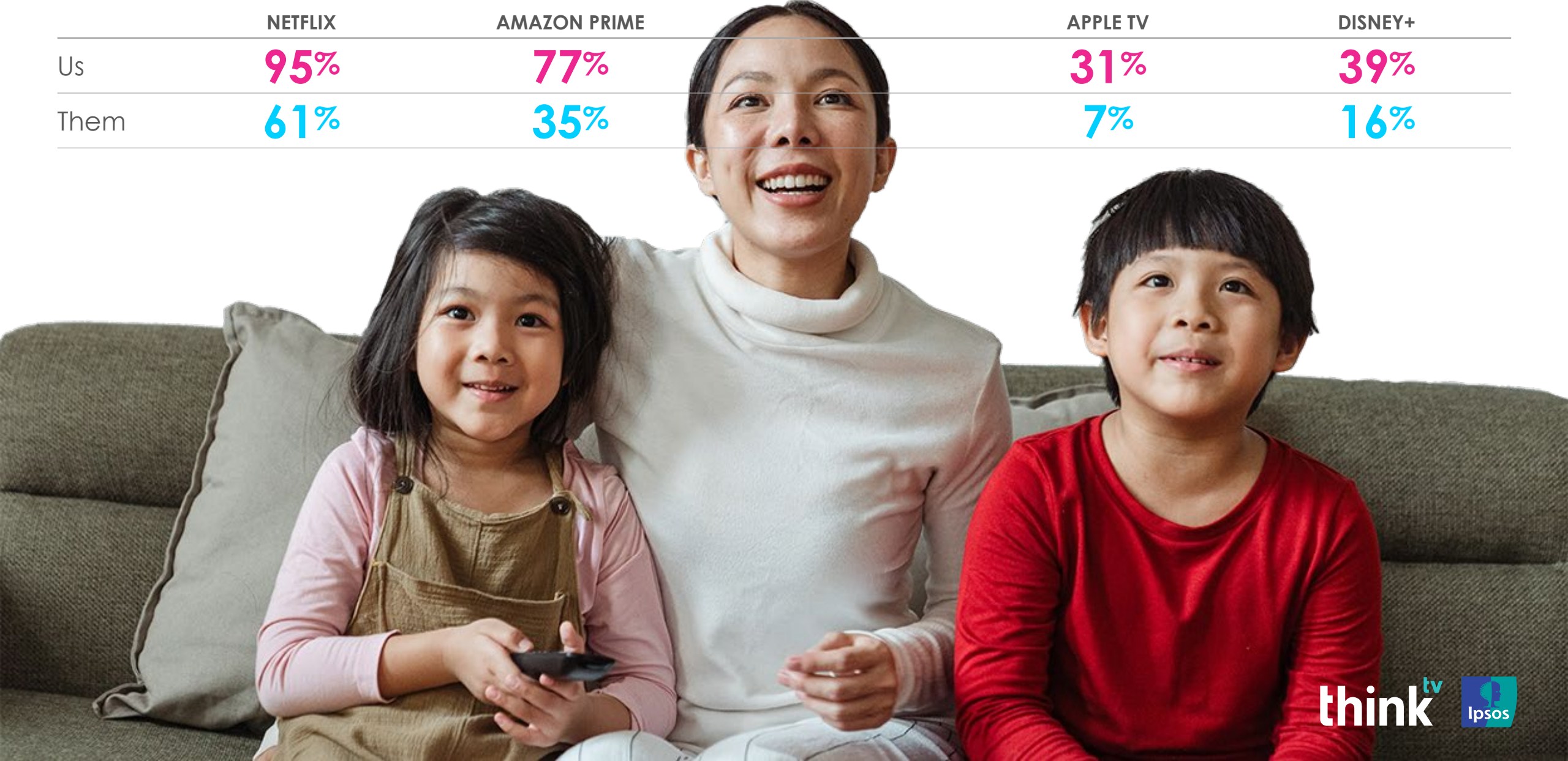
Context Item #2 – About **US** and **THEM**

	SMARTPHONE	TV STREAMING DEVICE	SMART SPEAKERS	SMART TV
Us	97%	66%	58%	67%
Them	78%	27%	19%	49%



Context Item #2 – About **US** and **THEM**

	NETFLIX	AMAZON PRIME	APPLE TV	DISNEY+
Us	95%	77%	31%	39%
Them	61%	35%	7%	16%



Context Item #3 – TV viewing CLARITY

Average Weekly Reach, 2019-2020 (000's)

27,528 (90%)

18+

6,968 (82%)

18-34

Source: Numeris

Context Item #4 – Impact of COVID 19

Big Brands are doing really well



Focus on Purpose



Socializing Smaller



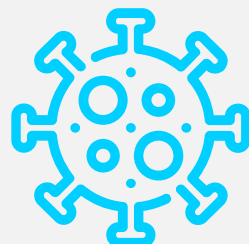
#1 Worry

Economy/
Unemployment



2017

Covid-19



2020

Some Stocks have gone NUTS



2017

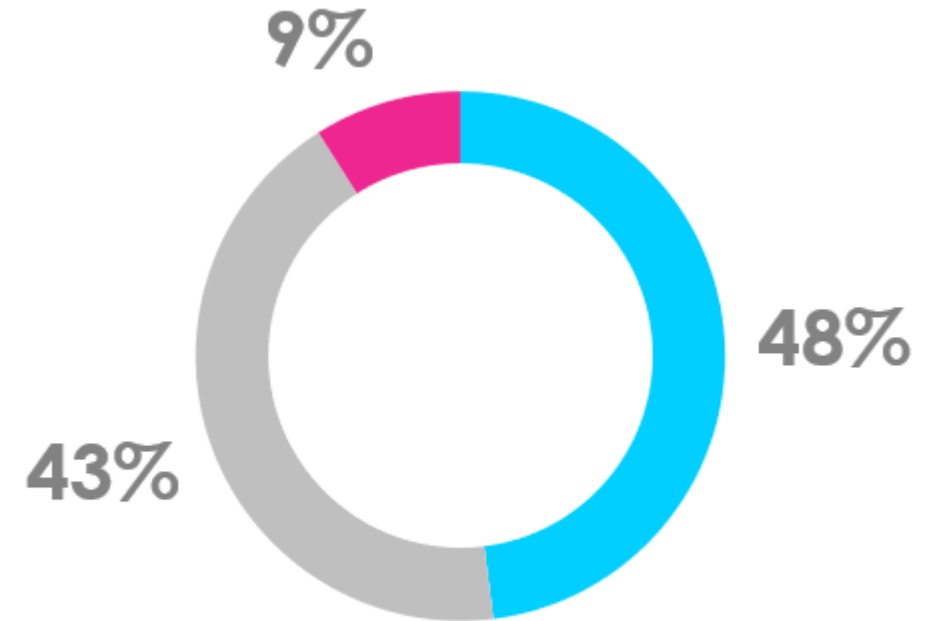
2020

E-commerce Users



Context #4 – Impact of COVID-19

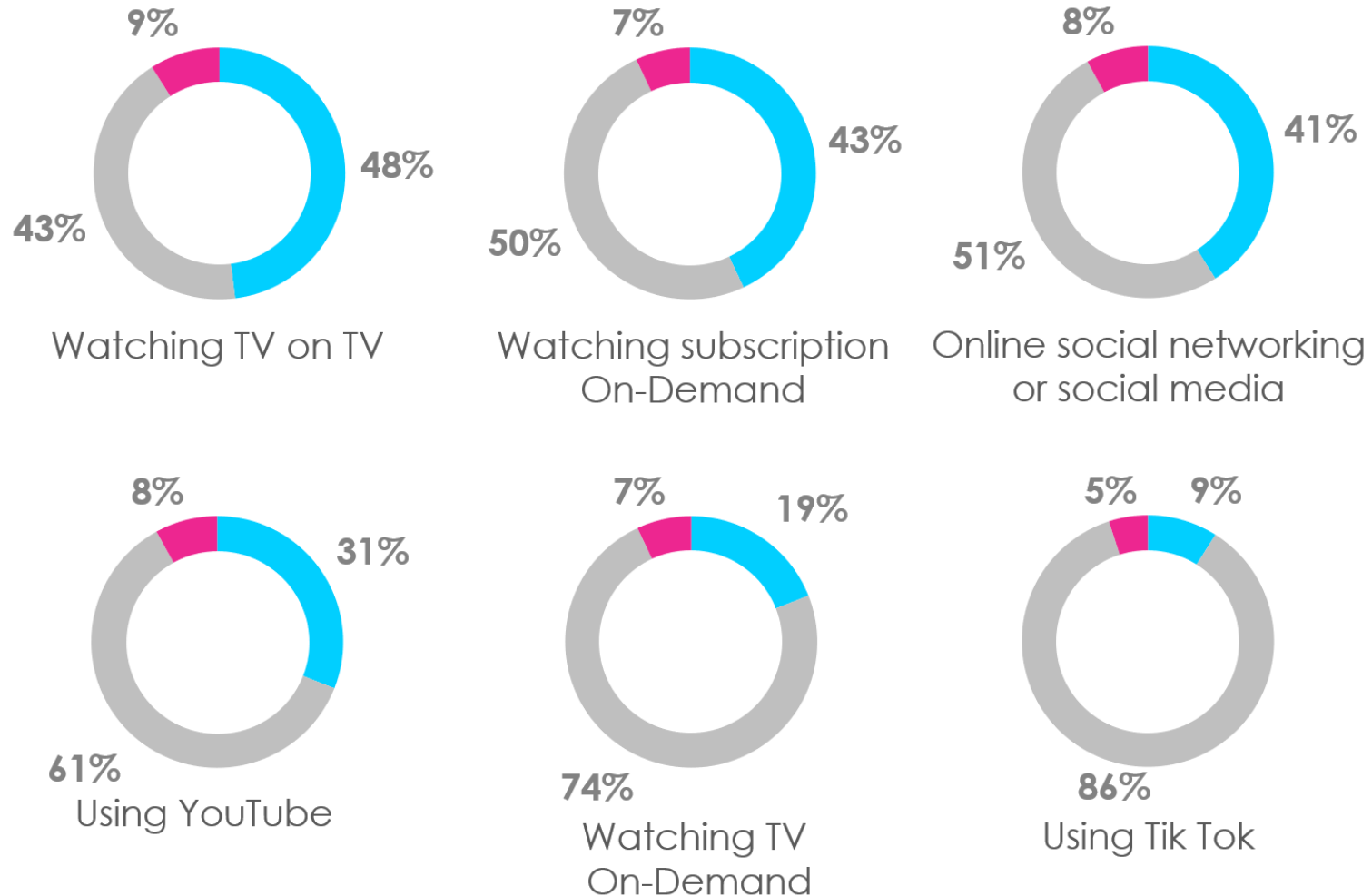
Impact of COVID-19 on time spent on an average day by Canadians on...



Watching TV on TV

Context #4 – Impact of COVID-19

Impact of COVID-19 on time spent on an average day by Canadians on...



When things return to 'normal' media habits will...

Return to pre-pandemic rates

39%

Stay the same

46%

● Increased ● Stayed the same ● Decreased

How has the COVID-19 pandemic impacted the time you currently spend on an average day on each of the following activities?

Context #4 – Impact of COVID-19

The COVID-19 Pandemic has impacted us too...

45%

have changed their planned media mix

28%

have increased their Digital/Social Media focus

19%

have cut back on spend

2%

have increased focus on television

30%

have placed more focus on content

11%

indicate a focus on content sensitive to pandemic issues

5%

are using more tailored, personalized ads/promotions

4%

are looking for more appealing/engaging content

Understanding that the COVID-19 pandemic has changed our daily lives and the way we work, how specifically has the pandemic impacted your approach to advertising, be it in the areas of media, creative or content?

Canadian Public

THEM



Three Summary Points

- 1 TV viewing 'on a television' is relevant
- 2 TV advertising is seen as the most compelling form of advertising
- 3 Opportunity to improve the public's trust in advertising and the impact of social media





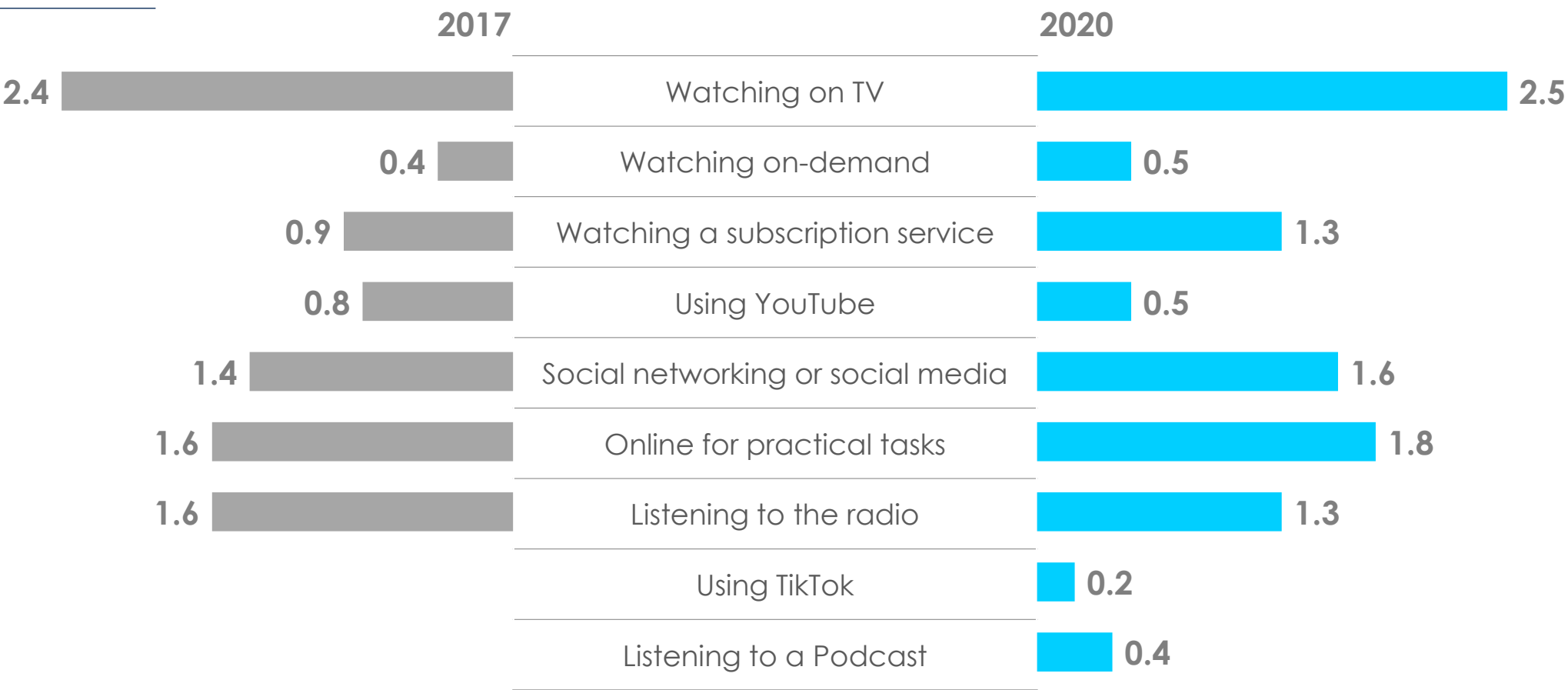
#1

TV viewing
'on a television'
is relevant

Canadians are engaged with TV – it is pervasive

Daily Time Spent on Different Media Types (mean number of hours)

CANADIAN PUBLIC



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

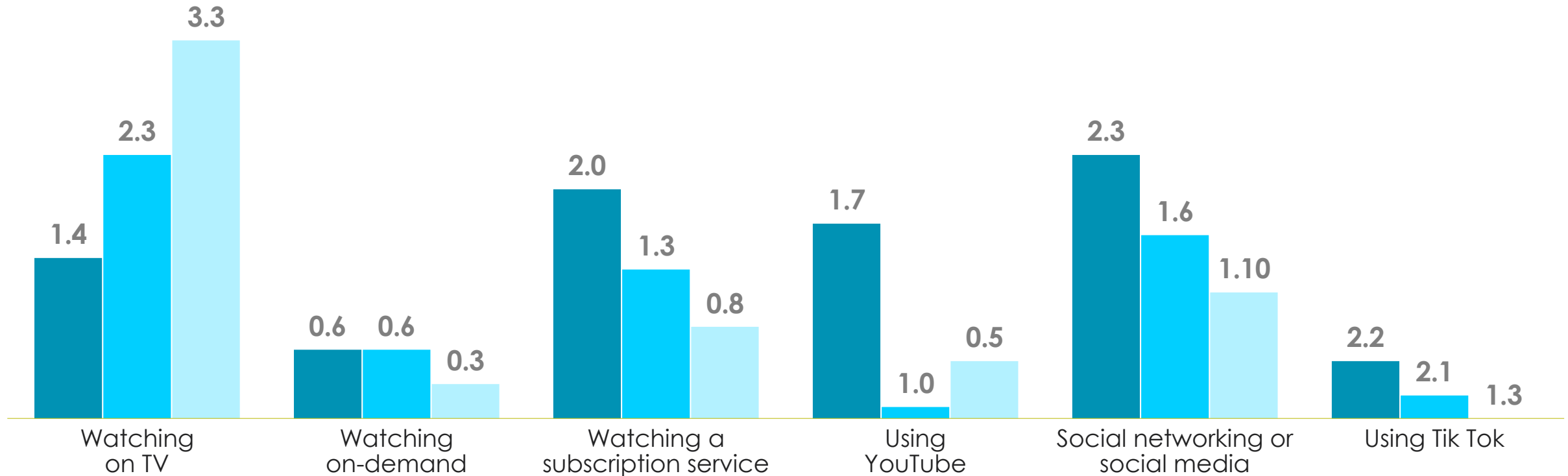
Young adults love multimedia – they do not discriminate

Daily Time Spent on Different Media Types (mean number of hours)

■ 18-34

■ 35-54

■ 55+



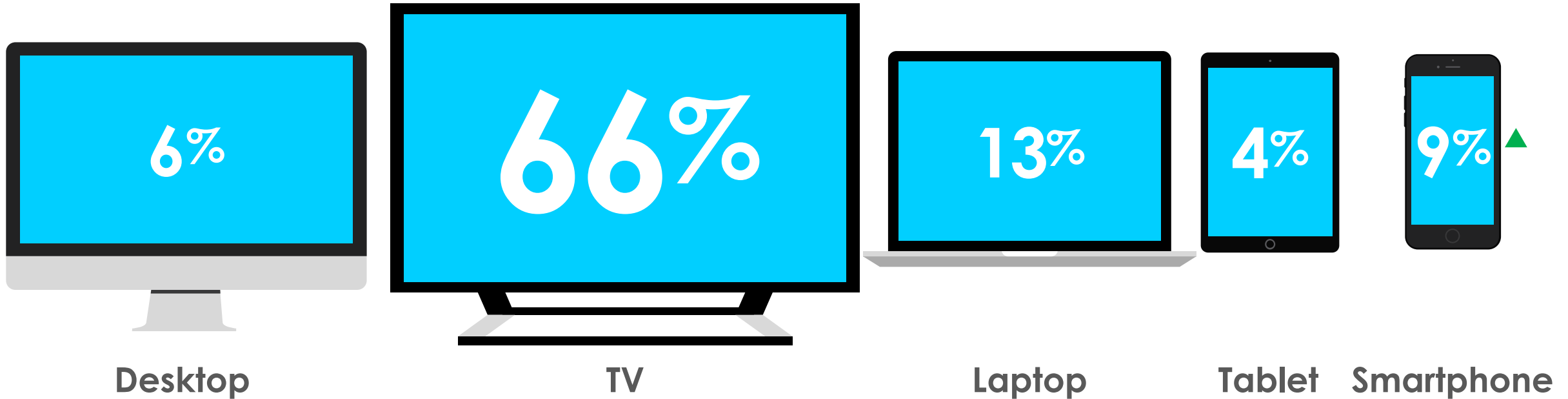
Young adults = 18-34 years of age

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

Where TV/ Movies are Watched (mean % of time)

CANADIAN PUBLIC

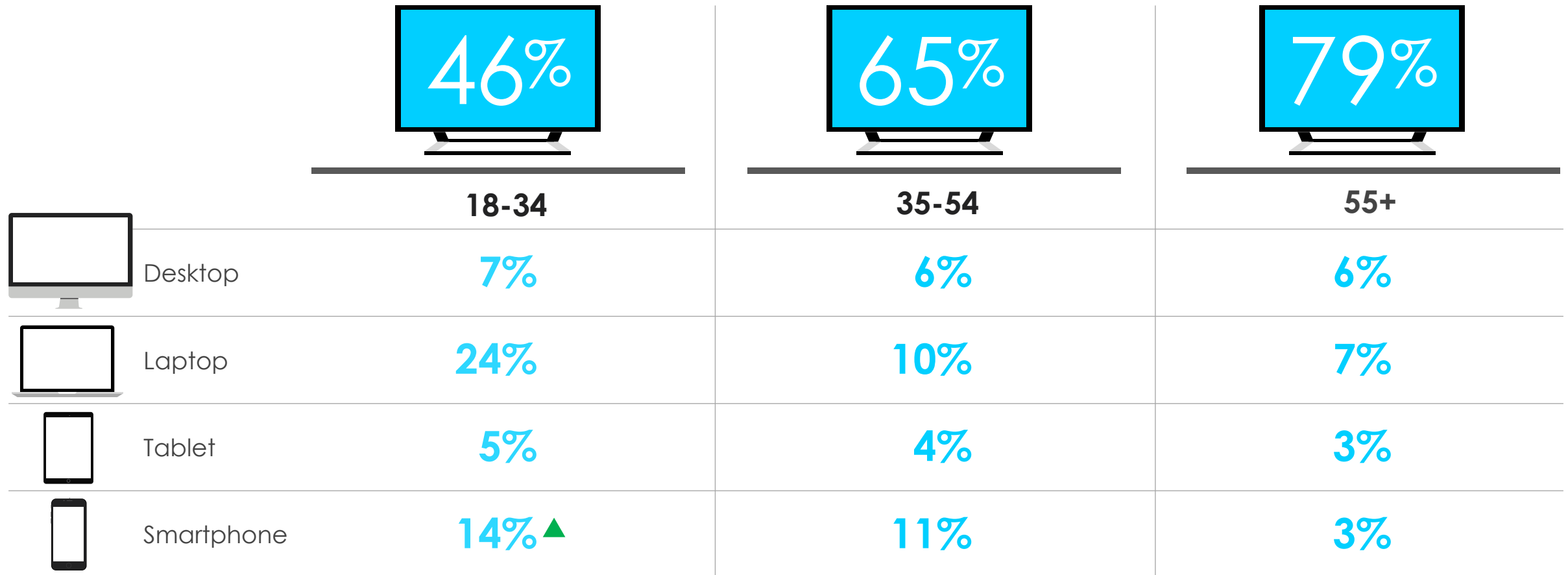


Of the time you spend watching TV shows or movies (excluding DVDs or shows from a subscription on-demand service like Netflix or Amazon), what percentage of that time is spent watching on a...?

Significantly up (▲) / down (▼) from 2017

Young Adults are more likely to use a mix of devices, but TV is dominant

Where TV/ Movies are Watched (mean % of time)



Young adults = 18-34 years of age

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...?

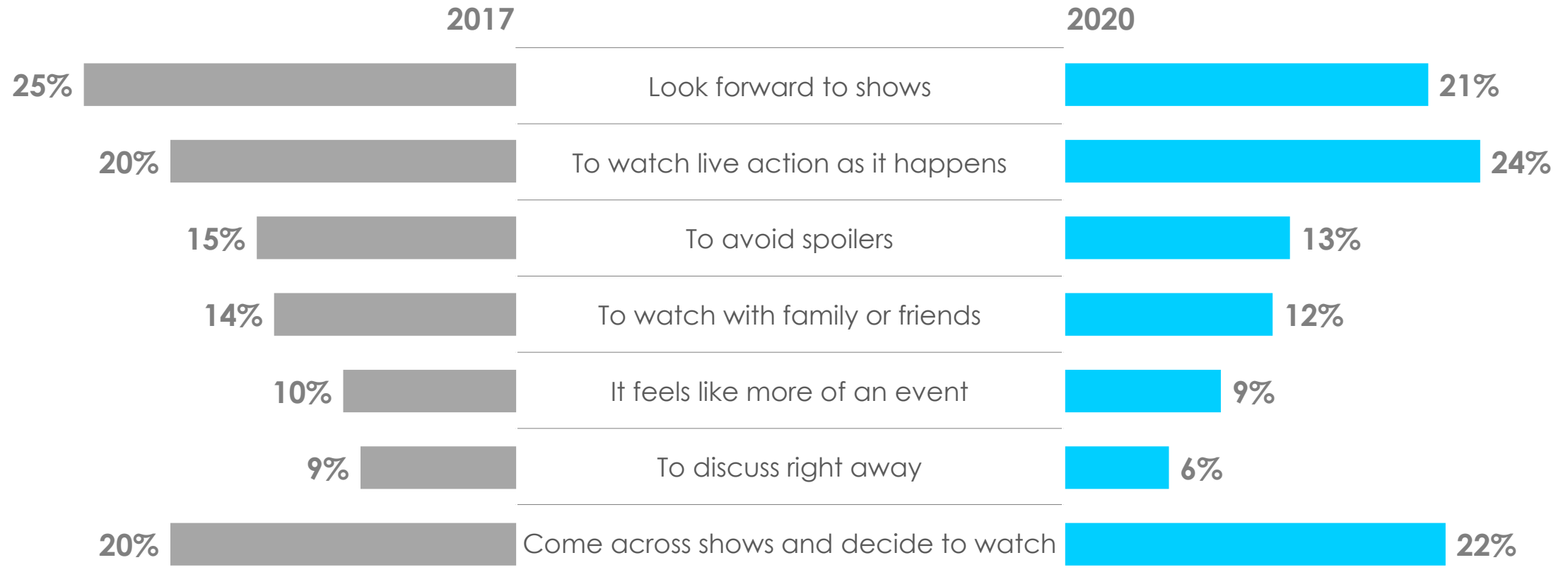
When watching TV, for what percentage of time do you think you use another device (smartphone, tablet, laptop/PC, etc.) at the same time?

Significantly up (▲) / down (▼) from 2017

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

Why do People Watch Live TV?

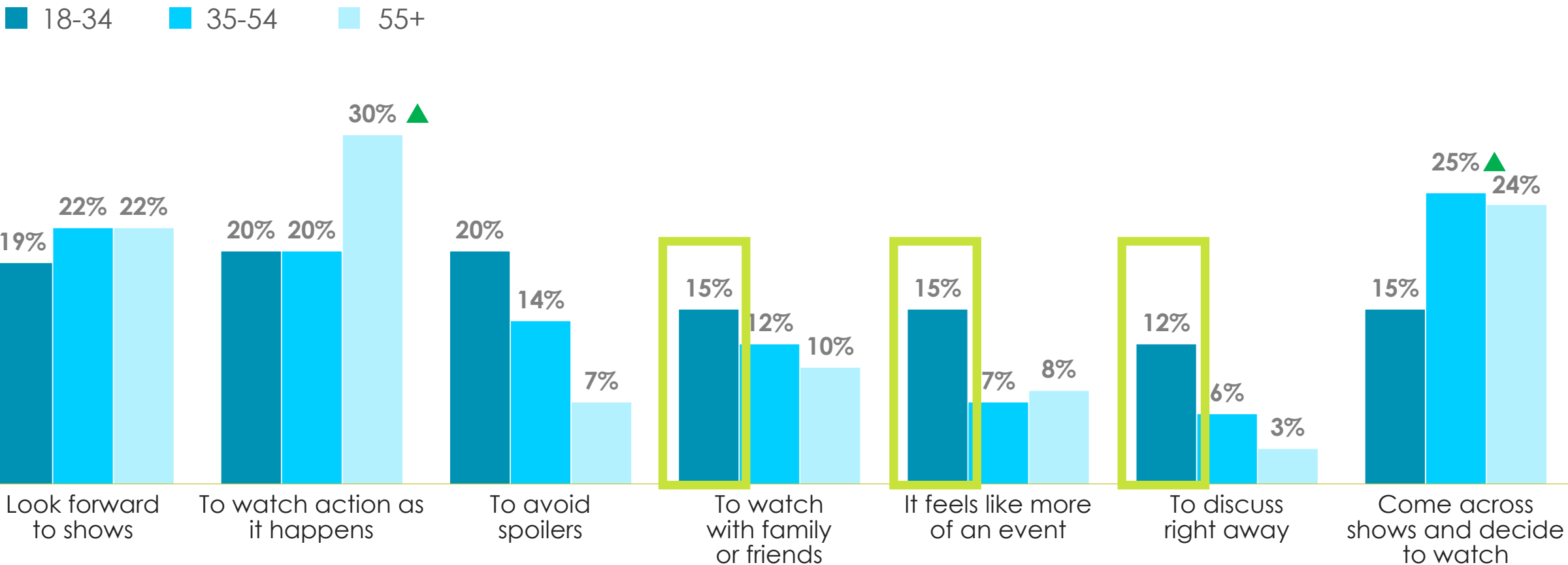
CANADIAN PUBLIC



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?

For Young Adults, watching live TV is also a social event

Why do People Watch Live TV?



Young adults = 18-34 years of age
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?

Significantly up (▲) / down (▼) from 2017

Multi-screening: viewers more focused than we think

% of Time Watching TV without Distraction (mean % of time)

CANADIAN PUBLIC



When watching TV, for what percentage of time do you think you use another device (smartphone, tablet, laptop/PC, etc.) at the same time?



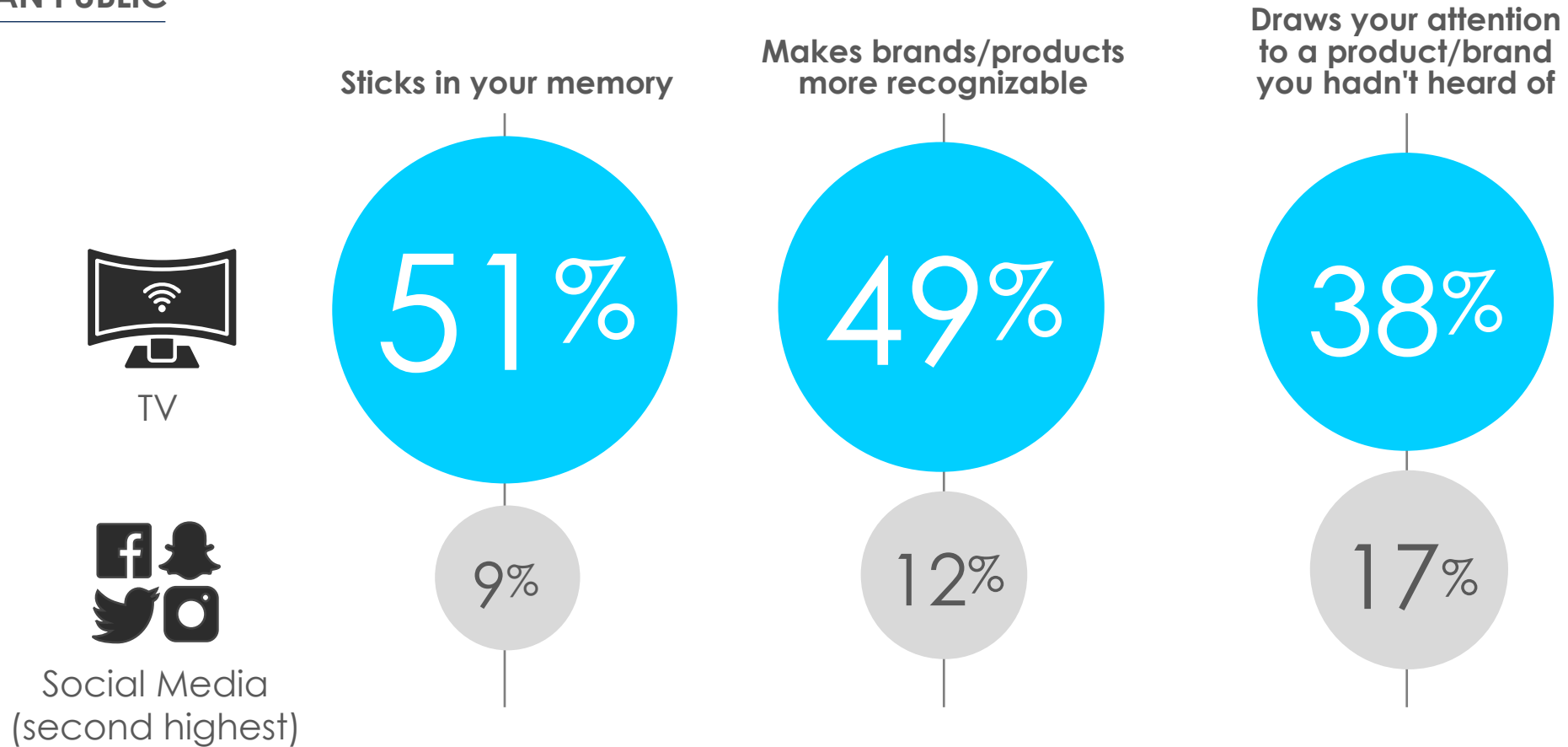
#2

TV advertising is
seen as the most
compelling form
of advertising

TV advertising has significant impact

Media Sources on which you find advertising that...

CANADIAN PUBLIC

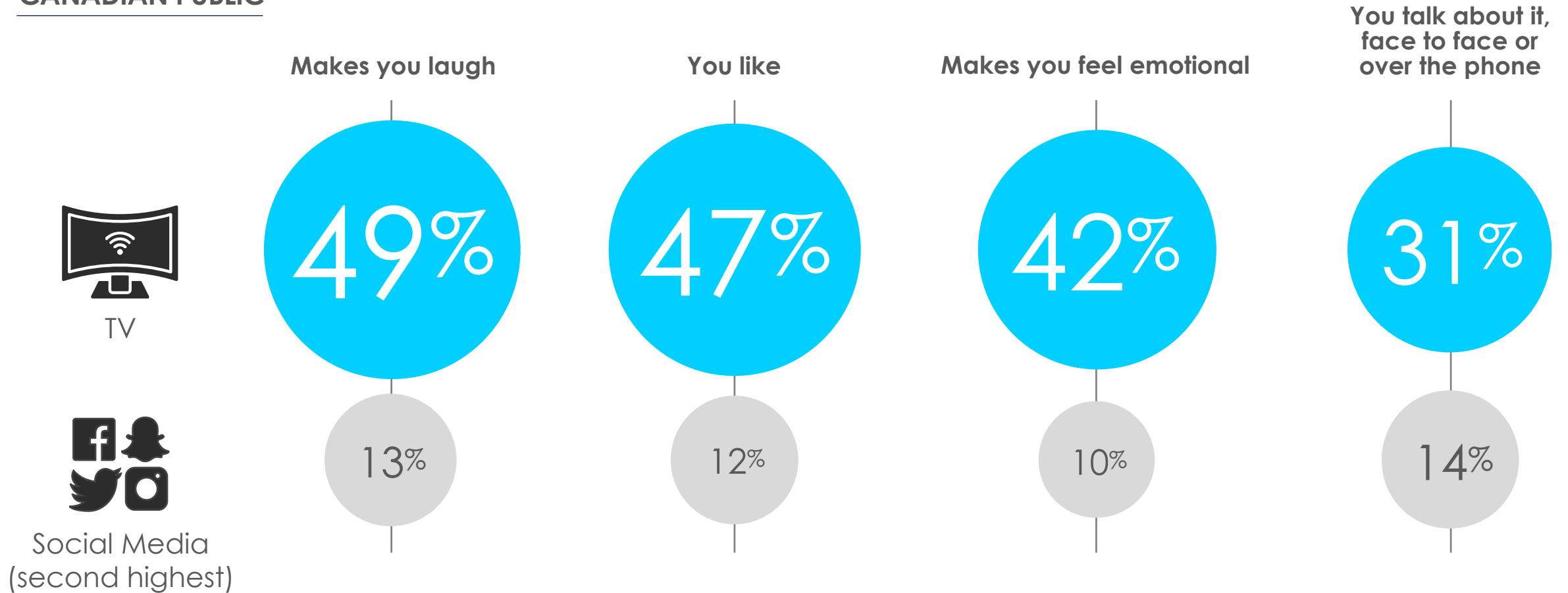


In which of the following media are you most likely to find advertising that...?

TV advertising is the most likely to generate emotion and conversation

Media Sources on which You Find Advertising that...

CANADIAN PUBLIC



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



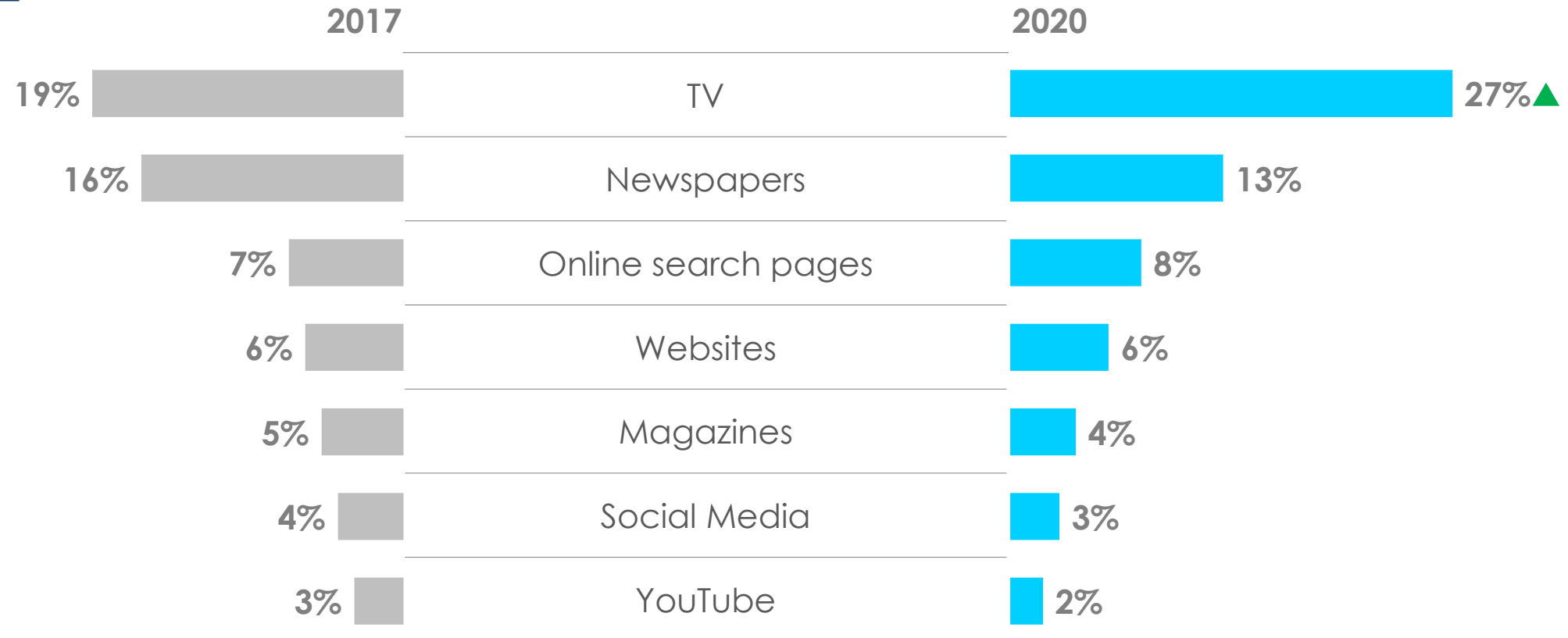
#3

Opportunity to
improve the
public's trust in
advertising and
the impact of
social media

Trust in TV advertising has made significant gains

Media Sources on which You Find Advertising that...

YOU TRUST



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

Significantly up (▲) / down (▼) from 2017

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

Don't trust advertising in any form of media

30%

2017

29%

2020

In which of the following media are you most likely to find advertising that [you trust]?

Looking Forward

2021

2022

2023

2024

- TV is, and will remain, a powerful force for the foreseeable future.
- TV as an advertising medium 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.

Industry Professionals



Two summary points and one consideration

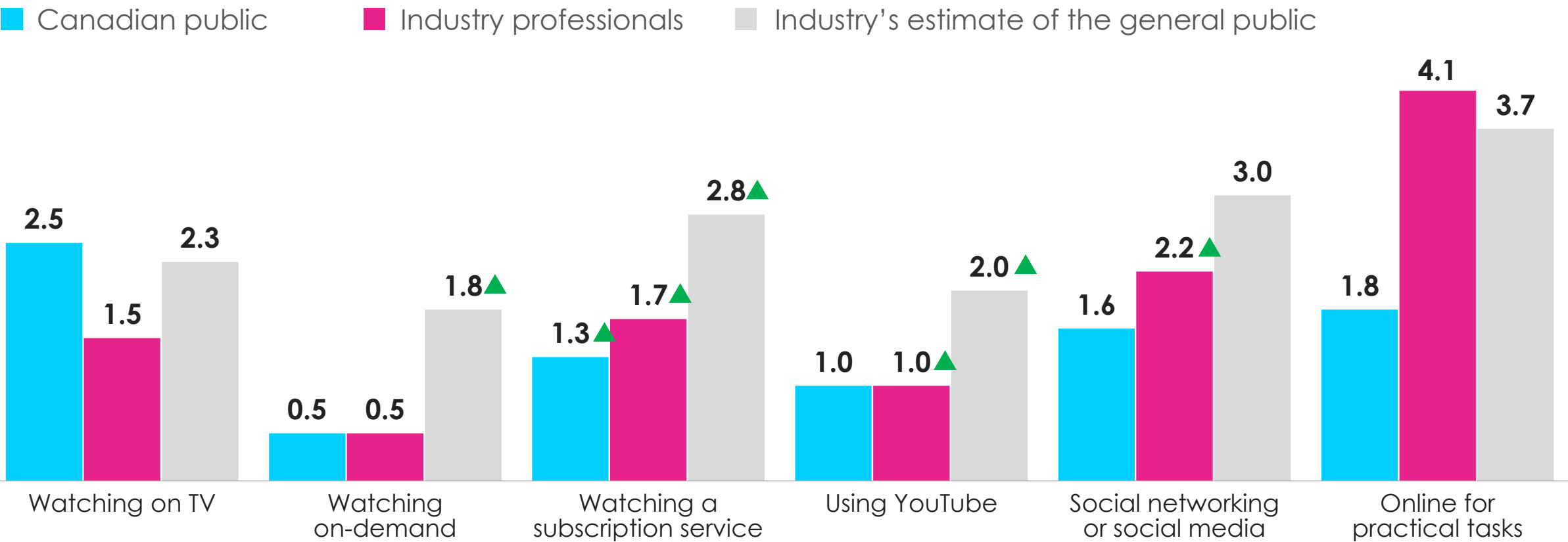
- 1 Industry media habits/ practices are markedly different from that of the public
- 2 Industry perceptions of what the public thinks and does from a media consumption perspective are different

Question for us to consider:
Does this impact our judgment?



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

Daily Time Spent on Different Media Types (mean number of hours)

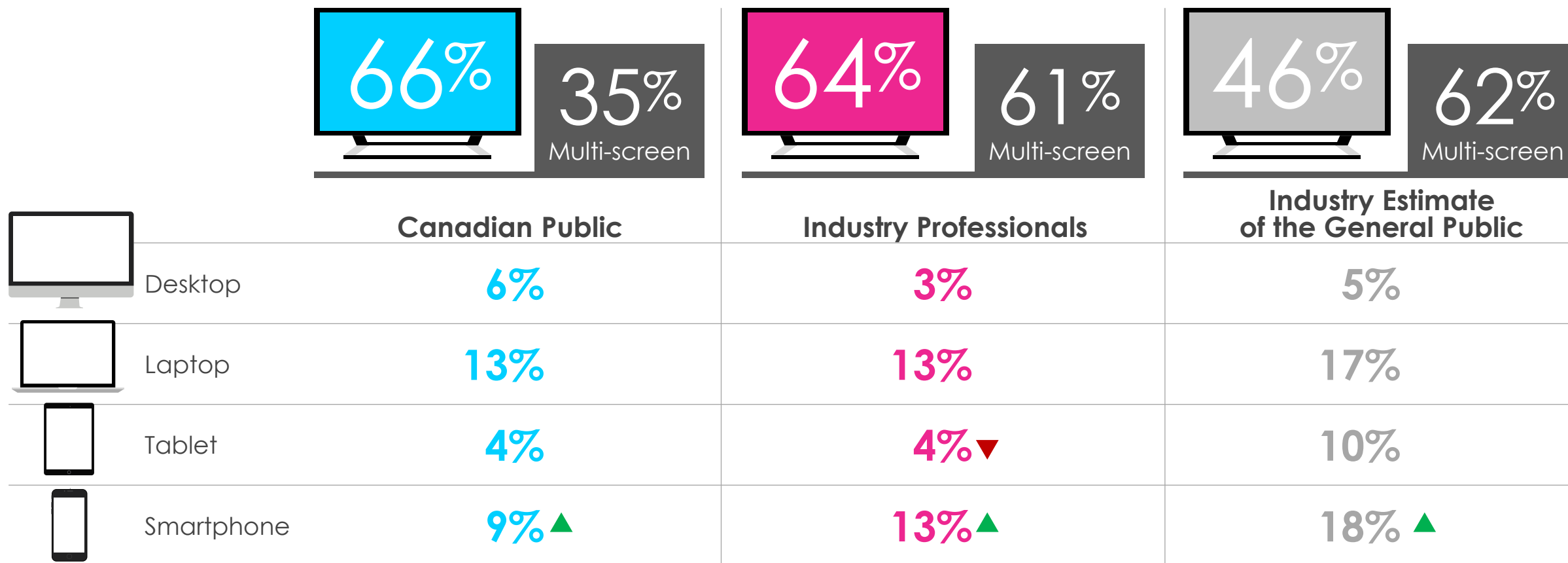


In an average day, approximately how much time do you spend doing the following activities?
What percentage of time do you think that **the average adult Canadian** spends doing the following activities in an **average day**?

Significantly up (▲) / down (▼) from 2017

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

Where TV/ Movies are Watched (mean % of time)



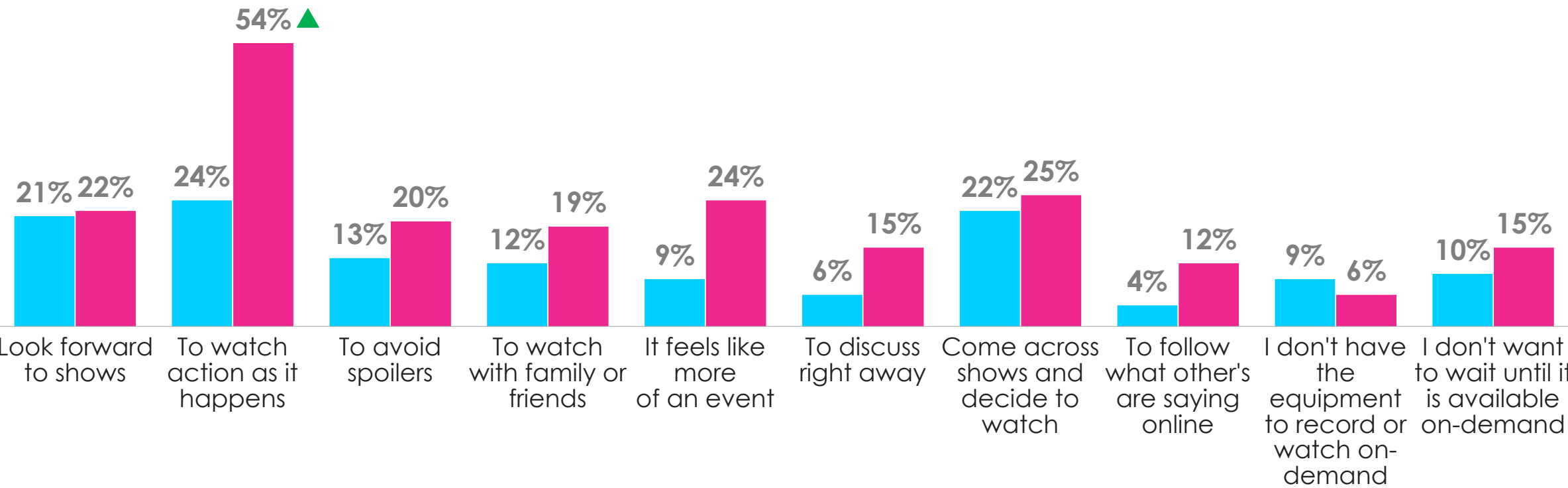
Of the time you spend watching TV shows or movies (excluding DVDs or shows from a subscription on-demand service like Netflix or Amazon), what percentage of that time is spent watching on a...?
 When watching TV, for what percentage of time do you think you use another device (smartphone, tablet, laptop/PC,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

Significantly up (▲) / down (▼) from 2017

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

Why do People Watch Live TV?

Canadian public Industry professionals

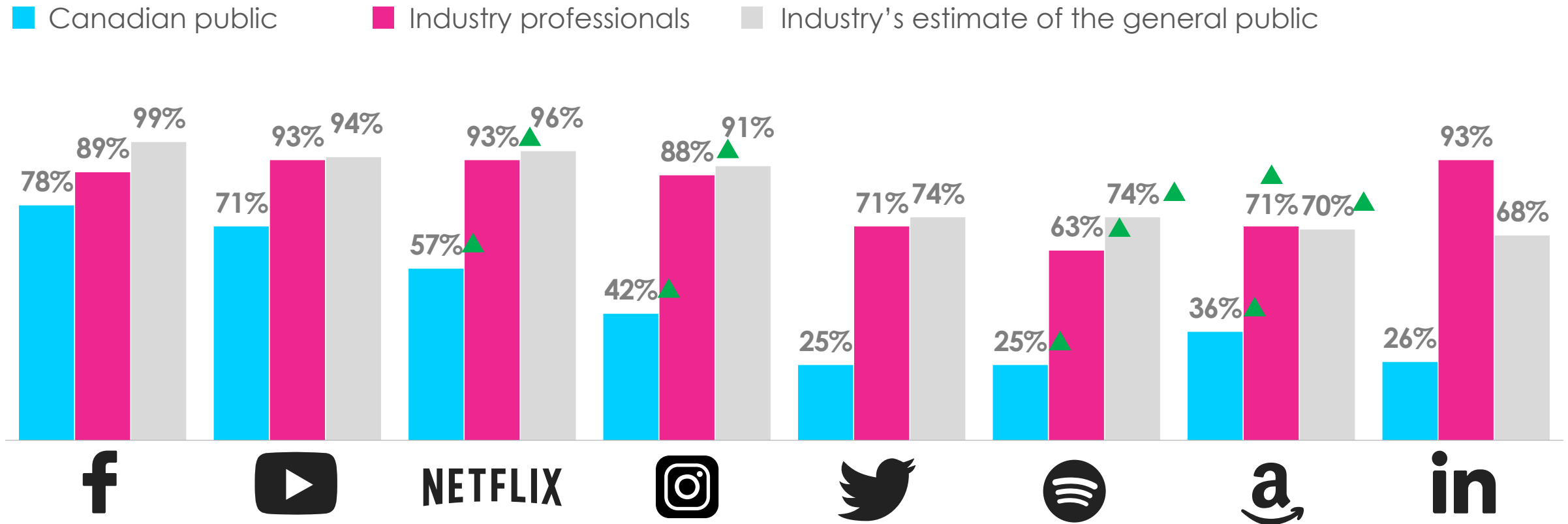


Why do you watch any TV shows live at the time they are broadcast rather than watch later recorded or via catch up/ on demand?

Significantly up (▲) / down (▼) from 2017

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

Apps Used in the Last Month



Significantly up (▲) / down (▼) from 2017

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

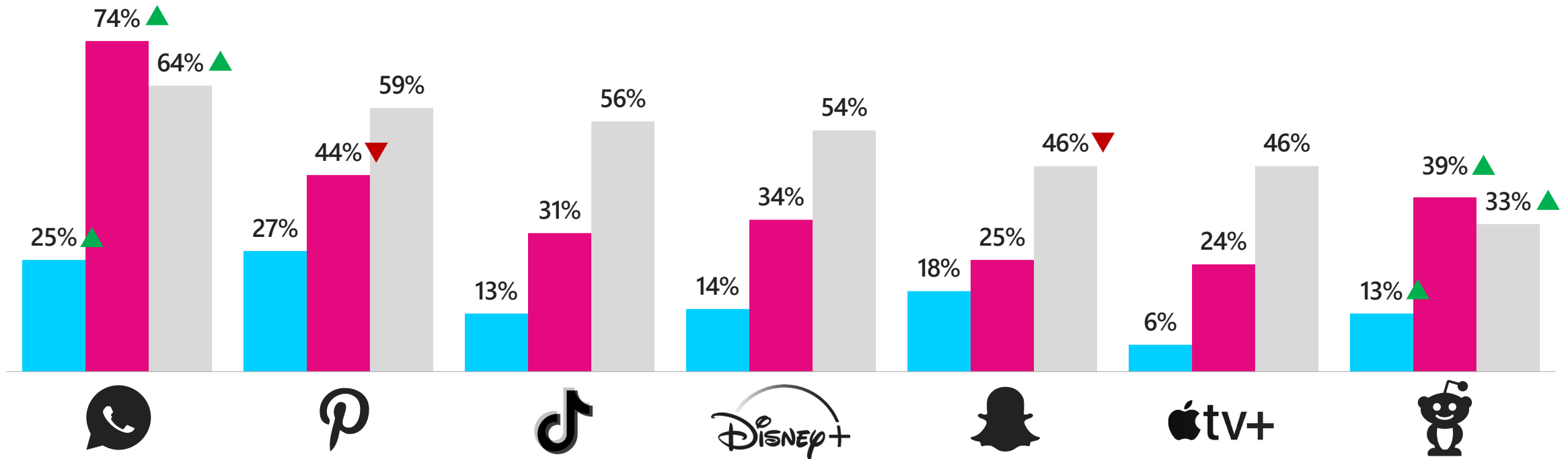
Which of the following websites, apps, or services do you think that **the average adult Canadian** has visited or used in the last 1 month?

Significantly up (▲) / down (▼) from 2017

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

Apps Used in the Last Month

■ Canadian public ■ Industry professionals ■ Industry's estimate of the general public



Significantly up (▲) / down (▼) from 2017

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

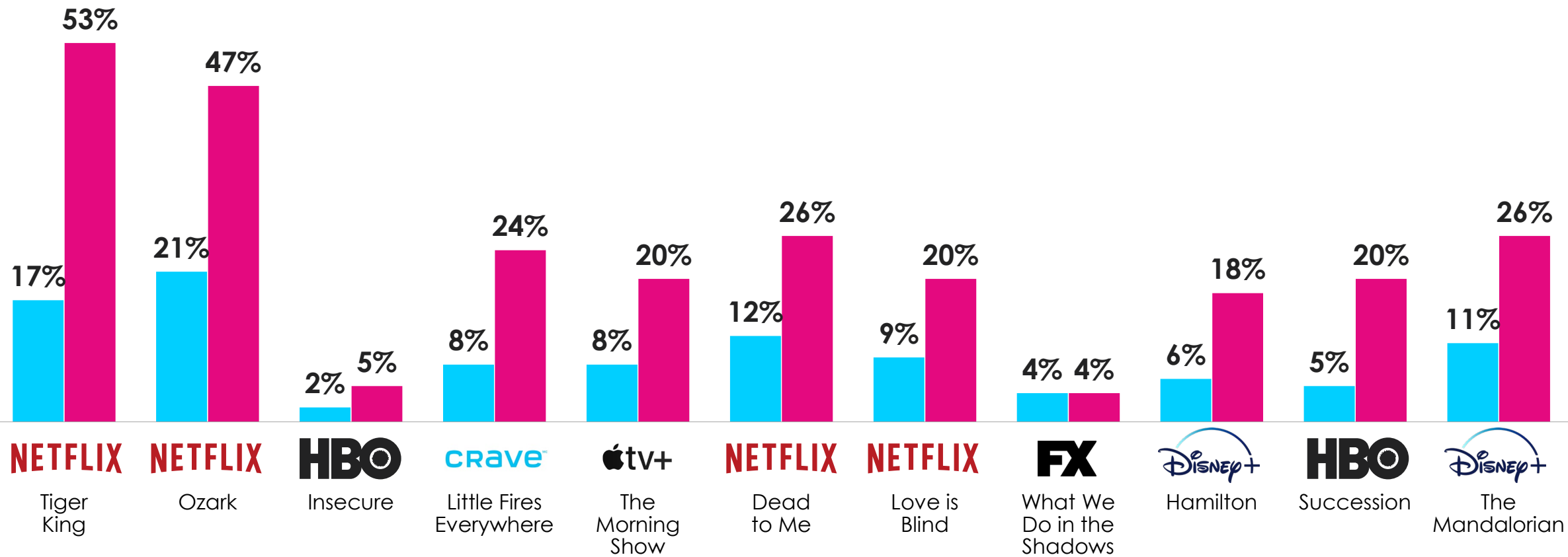
Which of the following websites, apps, or services do you think that **the average adult Canadian** has visited or used in the last 1 month?

Significantly up (▲) / down (▼) from 2017

We're not watching what they watch – does this influence our opinion?

At least One Episode Watched in P6M

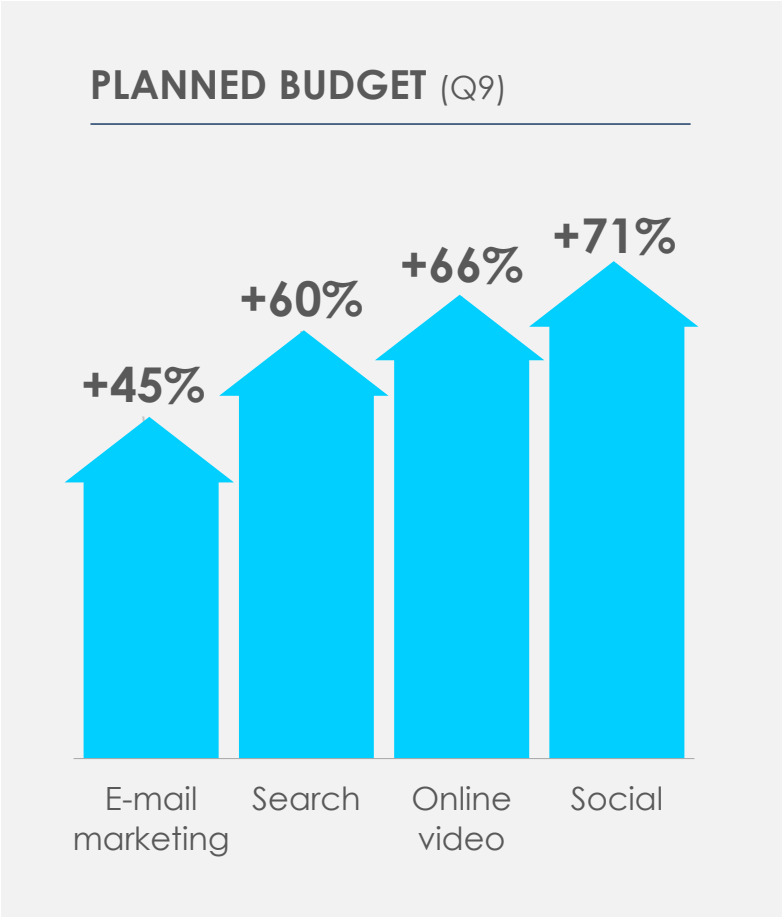
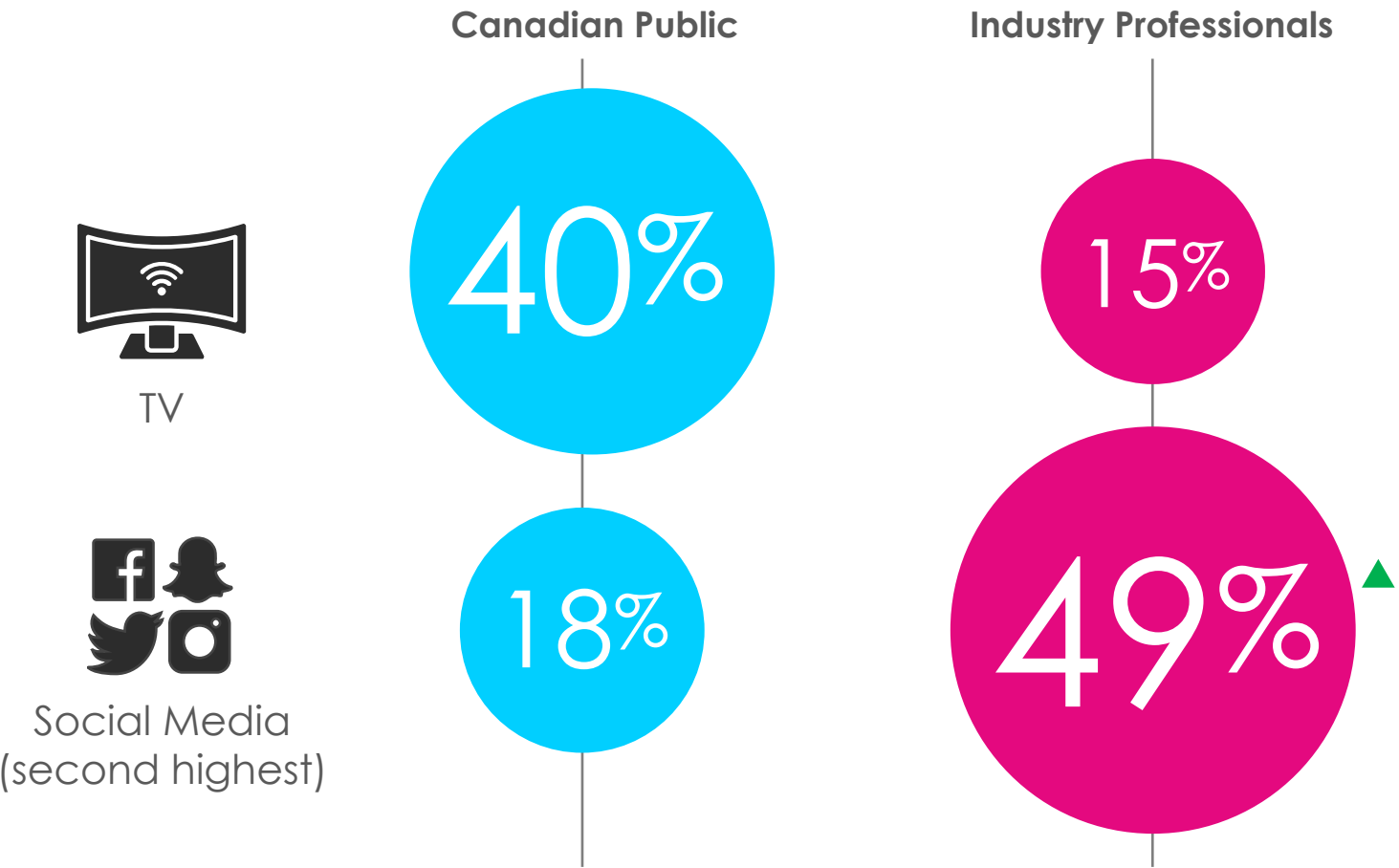
Canadian public Industry professionals



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

We are underestimating TV and overestimating Social Media

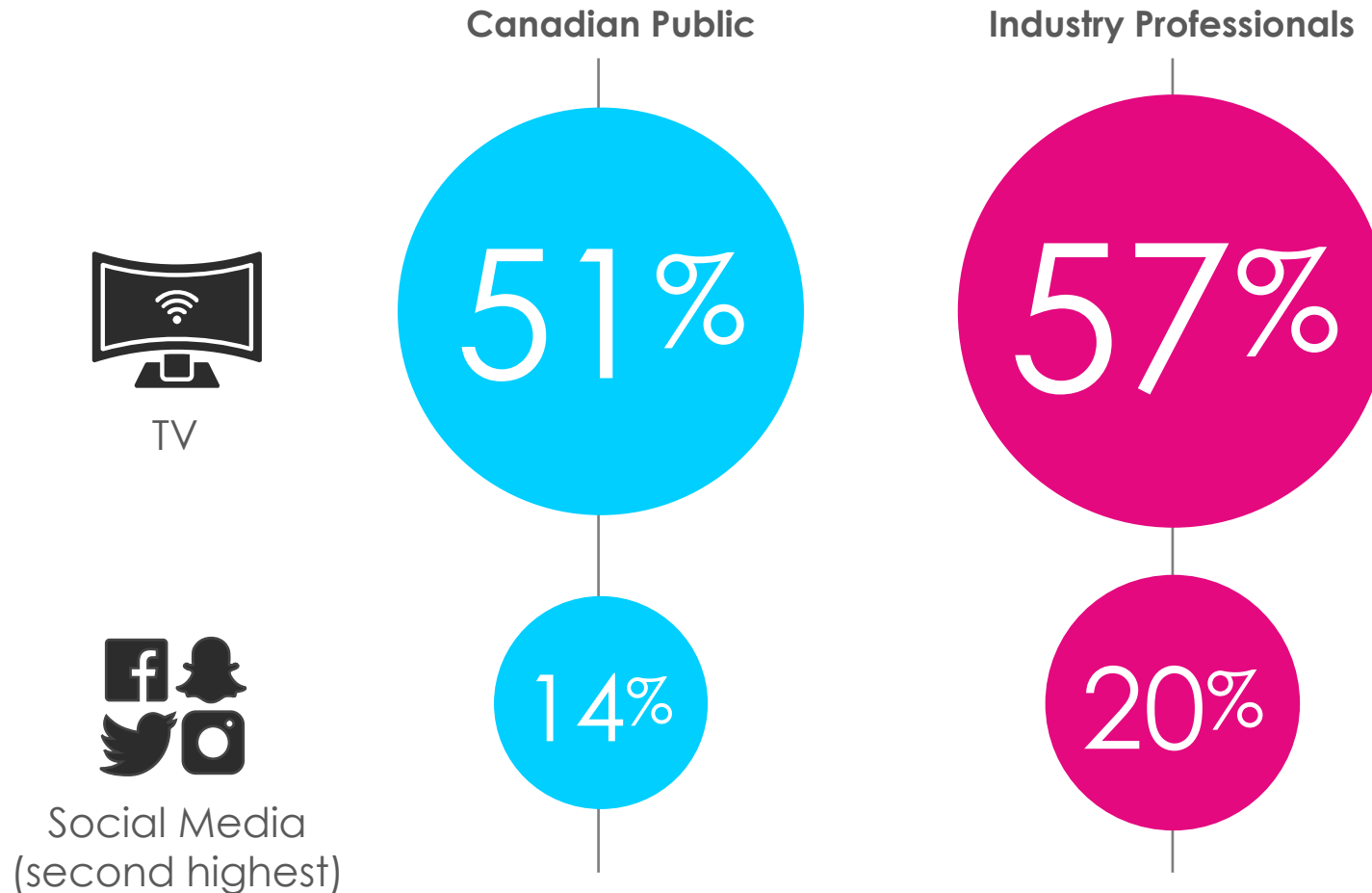
Draws your attention to a product/brand you hadn't heard of



In which of the following media are you **most** likely to find advertising that ...?
Assuming that your total marketing budget returns to a normal level next year, how will you adjust your spending for the following media (if at all).

But we also recognize TV's strengths

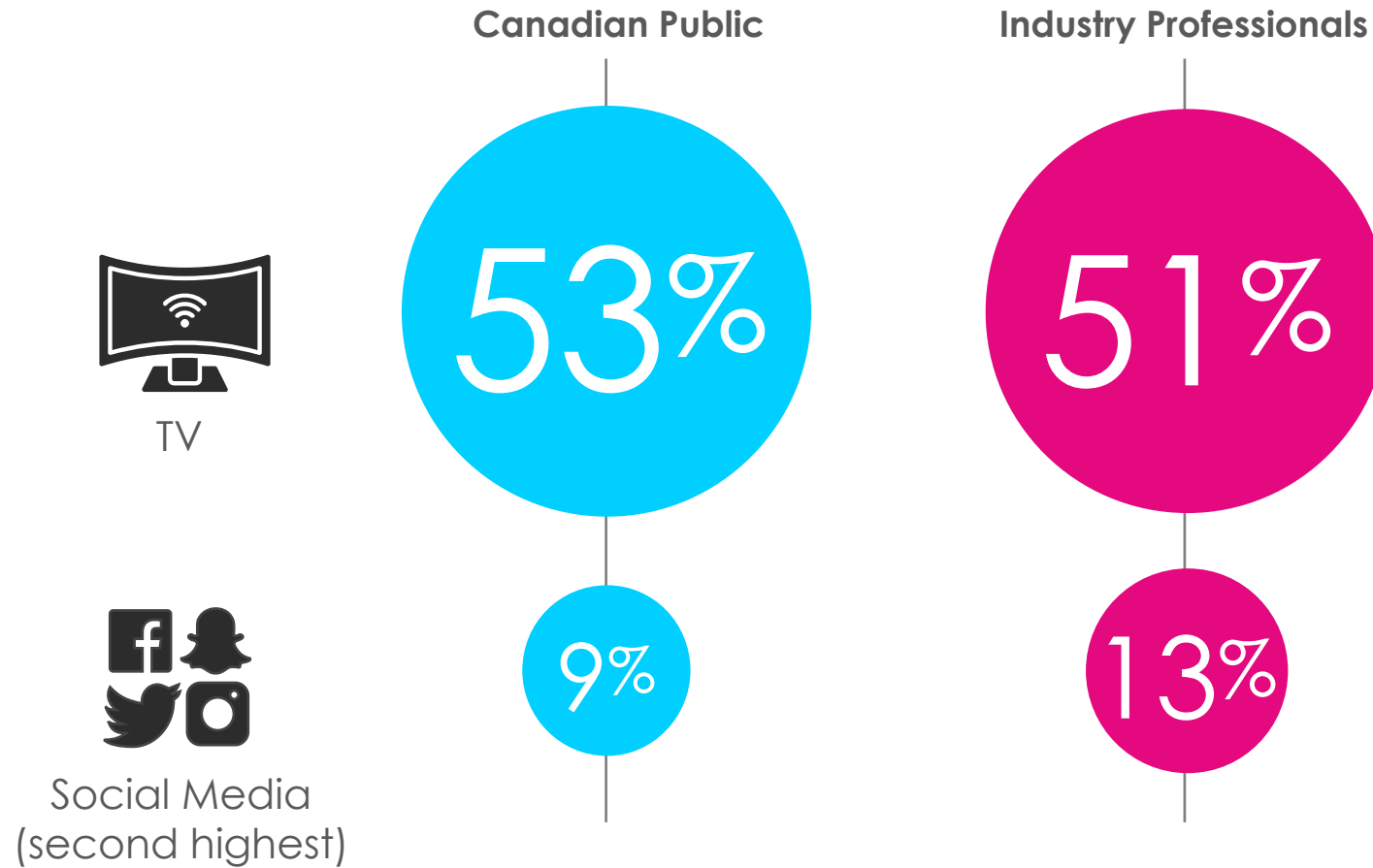
Makes brands, products or services more recognizable/famous



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

But we also recognize TV's strengths

Sticks in your memory



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

Looking Forward

2021

2022

2023

2024

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.

- As an industry, we overestimate the public's digital content media consumption, and our budgetary decisions reflect this.
- 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 draws attention to brands and products.
- 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.