



# 2010 Media and Technology Landscape Study Among Young Canadians

Executive Summary, August 2010



Young people, born within the last 20 years, have been interacting with media and technology at exponentially increasing rates. Being born into 1990s and 2000s meant that the evolution and near ubiquity of media and technology fundamentally shaped their early, formative experiences. Many only know a world where they contribute their perspective, participate in mass dialogues, disseminate information, and consume culture all on demand. As a result, young people have a much different relationship with today's media and technology than any previous generation.

Over the course of one generation, society has observed the onset of this media and technology renaissance. As the 1990s and the 2000s gave way to rapid technological advancement and mass adoption, young people saw Google, Blogger, Apple, Facebook, iPod, Blackberry and Youtube, among others, contribute to the way content was accessed, controlled and created (see slide 12 in Detailed Report). As a result, the ways in which we communicate, participate and engage in society and culture have been completely redefined. The plethora of social media and the variety of devices create a near seamlessness for both our digital and in-person interactions. This shift is fully embraced and largely driven by young people today.

The Shaw Rocket Fund has made it a priority to work with youth to ensure the industry tracks and anticipates the evolving media and technology habits of young people. We believe by integrating young people into the process it will help the Canadian media and broadcast industry continue to achieve its goal in producing high quality and relevant Canadian content. As a result, we are pleased to present the *2010 Media and Technology Landscape Study among Young Canadians* which captures young people's expectations about the consumption of and interaction with content today and, more importantly, into the future.

Footnote: The results cited are among the total sample, unless otherwise noted, and reflect the responses from over 1100 English and French youth aged 9 to 17 years-old.

The current landscape of technology reveals that young people have unparalleled accessibility to evolving technology and aspire to own sophisticated, often portable, devices. The majority of 9 to 17 year-olds, in both English and French Canada, have access to high speed internet, DVD players, wireless routers, and desktop computers, and all these devices can be found in the home.

Naturally, this unprecedented exposure to technology is paired with a growing desire to own more sophisticated devices. Laptops and smartphones top the list for desired portable technology for youth. The desire for these items reveal a need to access information and entertainment through a portable, personal device that can be used ‘on-the-go’ or in the privacy of their own room, instead of the previously enjoyed stationary, family-shared piece of technology. Laptops and smartphones also facilitate and perpetuate the desire to be in control of content, a sentiment that grows stronger with age. The “anytime, anywhere” premise has fully permeated young people’s mindset. They don’t hope for or ask for immediacy they simply expect it. Their status quo is complete accessibility.

There’s no doubt that technology has impacted the relationship young people have with their content. The variety of activities that young people participate in online is also a driving force across the landscape of expectations. The Internet has allowed young people to create and maintain a number of relationships simply through the interaction and participation in virtual worlds, social networks and social media. This level of interaction creates an inherent expectation on the way young people interact with their entertainment properties. For example: young people spend an average 5 hours per week communicating with others online; 4 hours per week for work or school; and 3 hours per weeks watching clips on Youtube. Their online activities are varied and can either be done concurrently or simultaneously. To further illustrate youth’s online association, previous research conducted in Youthography’s Ping Syndicated Study reveals that tweens (9 to 13 year-olds, as defined by Ping) spend approximately 13 hours per week on the Internet. Whereas their older teen counterparts, those aged 14-18 years-old, spend over double that time online (approximately 29 hours per week).<sup>1</sup>

Footnote: <sup>1</sup> Ping Syndicated Study, Youthography, among 9 to 18 years-old.

But have no fear, young people are still watching TV, albeit fewer hours than a decade ago and in a variety of ways. Our research shows, young people spend 15 hours during an average week watching TV.

TV remains the dominate source for entertainment, with over 7 out of 10 young Canadians stating that they ‘know what day and time their favourite TV shows are on and will make sure they are in front of the TV to watch them’. They plan and seek out their favourite programs. Advertising and friends, noted by at least 70% of 9 to 17 year-olds, aid young people in learning about new TV shows.

However, unlike generations past, it is not whether or not young people are watching TV; it is *how* they watch TV that is changing. While nearly all, at least 9 out of 10 English and French youth watch their favourite TV show on an actual TV, at least 7 out of 10 English Canadians and 4 out of 10 French Canadians also watch their favorite TV show on DVD, via DVR, OnDemand, by streaming, downloading or on their mobile phones. This means that when young people are engaged with a property, they'll use a variety of platforms to consume it. These alternative consumption methods are a supplement to watching traditional TV.

The reality is that young people are contributing to the pace in which the multi-platform experience emerges. With the multi-platform experience comes a desire to engage with information and entertainment in a holistic manner, which allows the audience to engage with the property in both a one-way, passive viewing experiences (like watching TV) and two-way, active experiences (like playing games on the TV show's website). In other words, holistic experiences of entertainment are about watching the TV show AND streaming it online AND playing a show related game AND entering contests AND reading up on characters AND downloading theme songs. Young people expect that a brand or its property to provide these types of activities as part of the overall entertainment experience.

Reasons for Visiting a Network's Website

Reasons for visiting a network's website Among those visiting	English		French	
	9-12 yrs	13-17 yrs	9-12 yrs*	13-17 yrs
To play games/activities	66%	47%	64%	32%
For contests/promotions	37%	46%	67%	61%
To read up on the characters	31%	43%	36%	19%
To watch an entire show (stream or download)	29%	56%	12%	19%
To check when a show airs on TV	25%	40%	27%	52%
To stream shorter video clips made for the site	16%	33%	18%	32%
For specials features	16%	30%	12%	19%
To read up on the storyline	12%	28%	12%	16%
To watch mobisodes or webisodes	-	7%	6%	7%

Media and Technology Landscape Study among Young Canadians, 2010, n=275

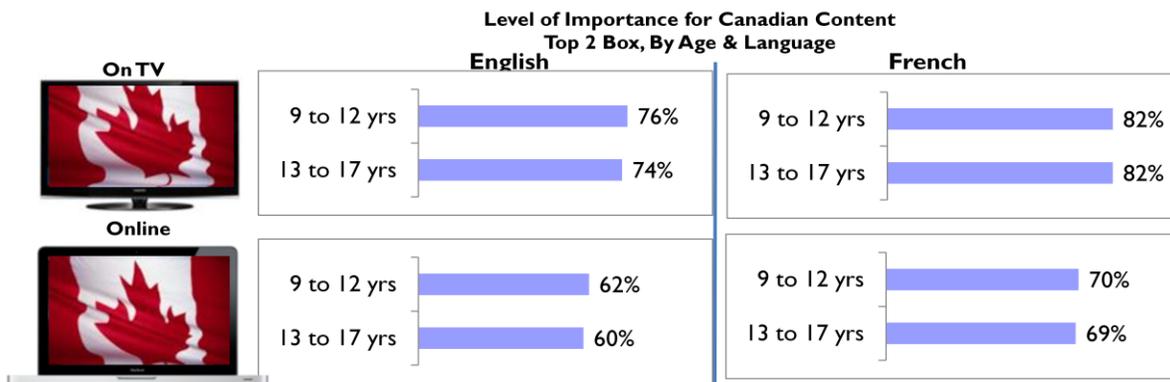
\*Small Base Size

Over half (53%) of 9 to 17 year-olds think that every TV show should have a website and further to this expectation, watching TV online is among the top 8 online activities young people participate in weekly, with 38% of 9 to 17 year-olds stating they watch TV shows online. Watching TV online is more likely to be streamed (for free!) over paid for downloading, from sites like Youtube, network sites or dedicated streaming sites like ninjavidoe.net. Online activities that precede watching TV are based on general “fun”, entertainment or educational based activities, like games, school work, streaming video clips, chatting, surfing for interesting things, and social networking.

Young people are already engaging in and are looking for a holistic entertainment experience. The cultural trend, identified in the *2010 Media and Technology Landscape Study among Young Canadians*, is the multifaceted media experience, which means entire entertainment properties will need to be designed based on a cohesive, overarching story and delivered to each audience through various platforms, using various techniques.

### Where does Canadian content fit amongst all of this?

Young people identified that Canadian content is essential to have on both TV and online. As illustrated in the chart below, 7 out of 10 English youth and 8 out of 10 French youth think Canadian content on TV is important. Having Canadian content online is also critical to young Canadians, with approximately 60% of English youth and 70% of French youth stating its importance.



Media and Technology Landscape Study among Young Canadians, 2010, n=1105



Our research shows that they value seeing qualities in characters that reflect themselves and scenarios that mimic their life. Entertainment targeted at young Canadians has typically done well if it accurately reflects their personal trials and tribulations, successes and pending empowerment.

Young Canadians are open to seeing elements of Canadian society and our country in Canadian content. Iconic locations and cultural elements that represent Canada are two examples that are able to distinguish Canadian content from other International properties. The young sophisticated viewers are increasingly aware that they live in a world that celebrates both the individual and the collective, on a global scale<sup>2</sup>.

Footnote: <sup>2</sup> The individual-collective is a term that describes the way in which young people define themselves: the ability to assert one's individuality within a network of people, all the while learning and growing from being part of the network.

The level of importance of Canadian content compared to the overall perceptions of the production quality and relevance of Canadian content are key measures for content creators to monitor. Overall, 4 out of 10 youth felt that Canadian content is "for people like me" and is known "for its production quality"<sup>3</sup>.

Footnote: <sup>3</sup> Production Quality was described as how it was filmed, the look of the sets, and the level of acting/quality of actors.

The Shaw Rocket Fund believes that young people have the desire, now more than ever, to connect to and be proud of 'their' Canadian content. Our country is known for producing great Canadian kid's programming, but the perceived reality is not fully aligned. The aim for the youth entertainment industry is to shrink the gap between the level of importance and the perceived quality and relevance by increasing awareness on the quality programming currently being produced in Canada.

Ensuring an appropriate amount of funding is available for producing content for this valued audience can only amplify the opportunity for young people to become increasingly aware of and proud of Canadian content now, and as they become adults. The Shaw Rocket has developed initiatives like The Rocket Prize for this purpose, but there is much more that needs to be done to address the changing content needs of young people along with creating awareness of the high quality programming made in Canada



## **Where does that leave us?**

We are left with five key insights with which to remain cognizant of when developing and financing content for young Canadians.

1. For young people, media and technology has increased in relevance and sophistication but it is simply a tool in which to facilitate youth's lives.
2. The holistic, multi-platform experience allows young people to interact with their television content in a variety of ways – they want a dialogue, an experience, a way to participate in the story.
3. Mobility, accessibility and a desire for immediacy allow young people to engage and interact with content seamlessly, without limits or boundaries.
4. As content becomes increasingly participatory and mobile and affordable, the ability to access content will become key for a brand or property to succeed.
5. Young people value Canadian content and want to see relevant and authentic stories that accurately reflect their personal Canadian identity.

We are in a privileged position of witnessing a major shift in media. The established set of mainstream avenues for entertainment may continue to show dominance but expectations for an enhanced experience exist for youth and are growing. This must be acknowledged and incorporated into the strategic vision of content creators and content providers alike.

## **What does this mean for the Shaw Rocket Fund?**

As the largest dedicated private investor in Canadian children's programming, we continue to remain focused on ensuring that the programs we invest in address the needs of the technologically sophisticated and media savvy audience of young Canadians.



The Shaw Rocket Fund intends to:

- **Support Relevant & Innovative Content Development Strategies:** The Shaw Rocket Fund will continue to support content creators that design programs as multifaceted media experiences – a multi-platform, dynamically holistic body of entertainment.
- **Employ a “For Youth By Youth” Approach:** Each year the Shaw Rocket Fund will track the attitudes, behaviours and overarching trends identified in this study, while unearthing new or emerging shifts relevant to the media and broadcast industry. The Shaw Rocket Fund firmly believes that by listening to young Canadians the industry can best deliver what youth truly want.
- **Awareness of Canadian Programming Among Young Canadians:** Increasing the awareness of the quality programming made in Canada requires equal value placed on both the production itself and the way in which it is disseminated and marketed. The Shaw Rocket Fund will continue to do its part through its Shaw Rocket Prize and other Fund initiatives.

The needs of young people are diverse and multifaceted and by monitoring and involving them in the process, content will be created with insights derived from the audience itself to meet their media savvy demands.

The Shaw Rocket Fund is a CRTC regulated independent private fund, created in 1999 to support and champion high quality Canadian children’s programming. Shaw Rocket Fund contributors are Shaw Communications and Shaw Direct.

Shaw Rocket Fund

[www.rocketfund.ca](http://www.rocketfund.ca)

