Looking Around: How Audience Make Choices

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Abstract

It was not that long ago when only television broadcasters determined when the audience could watch their favorite shows. With the complexity of content distribution channels, audiences now have access to more content than ever before and are demanding to watch shows anywhere and anytime they want, mixing on-demand with scheduled programs. The literature review reveals there is limited research in this area, especially around changing paradigms. The purpose of this study is to develop a better understanding of how audiences make the decision to watch shows (professionally produced programs) in a multi-screen environment with an abundance of media. Focus groups were the main method for gathering data and research was conducted in Alberta, Canada. Research revealed the decision making process for the audience is not linear and that there are many factors to be considered including: the mood they are in; their location; time available; who they are with; what shows and screens they have access to; value; and the quality of the image and sound. In discovering new shows to watch, participants identified word of mouth; reviews and recognition; trailers; search engine recommendations; brand; synopsis; packaging and artwork; and marketing as important.

Key words: multi-screen, audience research, audience behavior, cross-platform consumption, television, TV viewing, multi-platform, digital media viewing habits, online video.

Chapter 1. Introduction

In a multi-screen environment with an abundance of media, how do audiences choose shows to watch? What drives content choice? Is it time? Context? Location? Content? Recommendations? Screen size? Does the audience view shows actively or passively? Is the viewing planned or unplanned?

It was not that long ago when only television broadcasters determined when the audience could watch their favorite shows. There has been a paradigm shift with audiences as we move into a more complex and dynamic viewing world with early adopters driving change and where broadcasters have less control (Screen Australia, 2012). In addition to watching live television (TV), audiences are watching programs time-shifted through means such as personal video recorders (PVRs) and the internet. With the complexity of content distribution channels, not only does today's audience have more choice of channels and platforms, they also have access to more content to choose from than ever before (Cha, 2012). They are demanding to watch shows anywhere and anytime they want, mixing on-demand with scheduled programs as they commute to work, relax at home and attend theatrical screenings (Green, 2014). People who grew up with technology are not likely to give up multiple screen options and many choose to forego cable television subscriptions as they access on demand content through emerging platforms (Canada Media Fund, 2015).

I am a storyteller and content creator of digital media projects including documentaries, games, websites, webisodes or short videos delivered via the web and interactive content. I also teach part-time and volunteer on boards to help with training and to develop industry policy. In my industry, in order to stay relevant and make a living, people like myself need to adapt to the ever-changing environment. I wanted to do research that would benefit industry and am curious to find out about the impact multi-screens have on industry and audiences. When I started this project I asked myself: How does the audience make choices now? What impact multi-screens and/or technology have on choice? How can I reach audiences to help inform their viewing choices? In order to attract audiences, content creators also need to understand the factors or criteria the audience employs to make the decision to view professionally produced shows (i.e. movies, documentaries, episodes in a series) in the current multi-screen environment. Findings from this study could assist content creators, policy makers, and distributors to better understand how their audiences make decisions and help increase awareness of their programming. On a personal note, as a content creator I want to get audiences to watch more Canadian content, and in doing so help maintain our cultural identity in a multi-screen environment.

The research question guiding this study: **In a multi-screen environment with an abundance of media, how does the audience choose the shows they watch?**

Chapter 2. Literature Review

The broadcast model is changing, there are new developments in technology, there is more content to choose from than ever before, and new paradigms are developing as a result of these changes. The viewing world is more complex and dynamic as audiences can watch shows live, on-demand, anywhere, and anytime. The majority of the existing literature focuses on audience behavior in a traditional television broadcast environment and we are only recently seeing research looking at audience behavior in this new paradigm. There is a need for new research (especially in Canada) that addresses the evolving environment.

This literature review begins with looking at how some past research was conducted in a traditional TV environment. It then looks at research and changes in this new paradigm including research in the US, Canada, Europe and Australia. The review then moves into research in the era of broadband video delivery; examines the future of TV; introduces the problem of discoverability; and ends with a look ahead and some rationale for the design and methodology of the study.

2.1 Moving Away From Traditional Television

There have been many studies on audience behaviour in a traditional TV environment but more research needs to be done in the multi-screen environment where audiences are able to access and view more shows on tablets, smart-phones, smart or internet enabled TVs, and computers. With broadcasters losing control, research on broadcaster loyalty and ratings is less relevant. Some research looks at behavior from an advertising perspective (for example, research published by eMarketer, Market Leader, ComScore and Admap) including examining how audiences respond to advertising, how to better reach/target consumers, and how they choose what to watch, but in a time when they watched shows prescheduled by a broadcaster on a TV. Advertisers and broadcasters feel the damaging effects of an audience that has increased control of media consumption and increased their ability to avoid ads (Napoli, 2011).

Past literature on media use has focused on how structures like broadcast schedules shape media consumption or the assumption that people make purposeful choices when they consume media (Taneja, Webster, Malthouse, & Ksiazek, 2012). Research that has relied on self-reporting is prone to inaccuracies (Taneja et al, 2012). The majority of existing research happened when linear broadcast television (with no interactivity) was the norm but with new technologies (including delivery methods) and access to more content, the way people watch TV may have changed.

In the past, TV research has been done with people-meters, home-based devices that detected whether sets were on or off and identified the channels homes were tuned into (Green, 2014). As part of the research, people were asked to press a button to indicate when they were present in a room with the TV on (Green, 2014). Research has also been done with set top boxes where digital cable and satellite subscribers agree to have their set top boxes and TV set monitored (Green, 2014) and diaries where audiences record what they watch.

With advances in communication technology, there has been a shift in the audience from passive, where they sit back and watch shows during the broadcasters live schedule, to more active behaviour where they demand, choose, fast-forward, create and share content (Jenkins, 2006, Shirky, 2008). Jean-Paul Edwards (2014) reports that while TV viewing is seemingly stable, older audiences are watching more TV while younger people are watching less traditional TV, more likely to time-shift and watching more TV online. Audiences are watching TV less conventionally and the business model of TV is getting mixed up with TV as a distribution channel (Wolf, 2015).

Online video viewership is growing (Brightcove & Tubemogul, 2010; Green, 2014) and audiences are demanding to consume media anywhere and anytime, not just when the broadcaster has it scheduled (Taneja et al., 2012; Green 2014). In this new landscape the control of the schedule is passing from broadcasters to viewers (Napoli, 2011; Green, 2014). In addition to watching live linear television, audiences are also now watching programs time-shifted through means like DVRs and the internet (Green, 2014). Audiences can also watch the same movie via multiple methods and screens including by live broadcast, pay-per-view, playback on a PVR, DVD, projected on a screen at a movie theatre or at home, and streamed or downloaded on their TV, computer, ipad, smartphone. As audiences are able to consume some of the same content on multiple screens, this creates big challenges for audience measurement (Green, 2014).

The Canadian Radio-television and Telecommunications Commission (CRTC) reported that in 2012, one-third of Canadians watched TV online, six percent watched shows on their tablet or smartphone, and four percent watched TV shows exclusively online (as cited by Payton, 2013). The CRTC's Communications Monitoring Report says that in 2013, the time Canadians spent watching traditional television had declined across all age groups with the greatest decline amongst 18 to 34 year olds (2014). However, the number of Canadian households subscribing to cable and satellite saw no signs of notable change from in the two previous years. Netflix subscribers in English Canada went from 21 percent in 2012 to 29 percent in 2013. Despite these numbers being dated, they represent a significant increase considering Netflix has only been in Canada since the fall of 2010.

In 2012, the Interactive Advertising Bureau (IAB) conducted nationwide research in the U.S. to determine how multi-screen ownership is affecting consumer behavior (as cited by Idugboe, 2012). Of those 18 to 44 years of age, 74 percent are most likely to be using four screens – tablet, TV, computer, and smartphone (likely not all at the same time). They are also the most active on these four screens. The survey results also revealed that just over 52 percent of Americans across all ages surveyed indicated they use two devices at the same time. Though multi-screen ownership affects consumer behavior, the majority of survey respondents still prefer to watch shows on their TV screens. Idugboe notes that despite the increase in other digital ownership, the possession and use of TV have not dropped significantly and the majority of survey respondents still prefer to watch shows on their TV screens.

In the article "Big Audience Changes Ahead", John Carey (2005) states "new technologies [provide] more control, [reduce] dependence on schedules, and [increase] the time people spend with video programming" (p. 30). Though this reference is dated and may not reflect the current environment, his general observations still have relevance today. Audiences have extended their TV viewing across additional delivery systems like DVDs, online and on-demand content but menus and navigation remain a challenge. At the time of the Carey study, high definition televisions (HDTVs) and DVRs were showing up in more households. Also, consumers reported Video On Demand (VOD) still had limitations and did not always offer the latest movies so they were still going to rental shops for DVDs. They noted DVRs made television watching a more enjoyable experience as they could watch more of what they wanted with fewer commercials. On implications for the future, the author predicted, “in the new digital environment, TVs are computers with multiple modes, inputs, outputs and complex remote controls to operate a large number of functions” (p. 33) and notes that the business model of commercial television could be destroyed by DVRs as audiences fast forward through ads. In a paper published by the same author three years later, research revealed consumer motivations for downloading shows include cost, convenience, control over content, and ability to customize personal preferences (Carey, 2008).

The reality is that with the emergence of the internet and broadband technology, the proliferation of TV channels, and mobile phones becoming commonplace, the media world has fragmented (Grove, 2012). We still do not know the full impact these developments will have on the media and entertainment industries.

2.2 Early research in this new paradigm

In a study that looked at media consumption across multiple platforms, the researchers looked at data gathered in 2008 from a sample of 495 subjects Nielsen TV people-meter panelists in an effort to identify user-defined repertoires (Taneja, Webster, Malthouse, Ksiazek, 2012). The data had been gathered by observing participants as they used media over two separate days. Prior studies that they looked at did not take into consideration the role of availability of content in explaining media repertoires and the researchers saw this as a major drawback. The researchers noted that online video and mobile internet have become more common since their data was collected and that they did not include DVRs in their research. They looked at all media consumption and noted that in 2008 when the data was collected media on mobile devices was typically used on commutes even though it was available other times. With media at home, linear TV remains a predominant source.

Barkhuus (2009) conducted hour-long semi-structured interviews with thirteen college students for a paper about viewing TV on the internet. Data from this study revealed that even at this time, not all students had cable subscriptions and many were happy to watch content on their computers. The author predicted that in the future, television "will rely much more on personal recommendations and embedded advertisements, since people will be less likely to assume that there will reliably be material of interest on television on Thursdays between 8 and 10 pm" (p. 9) and that there will continue to be social aspects from "tagging shows for recommendation to friends, to built-in text chat channels" (p. 9).

A study published by Bondad-Brown, Rice & Pearce (2012) looked at motivations for accessing online video, compared them to motivations for viewing traditional TV, and examined how audiences find out about content. They surveyed a U.S. sample of adult internet users to identify and compare motivations for viewing traditional TV and online user-shared video. The amount of time adults spent viewing TV increases as they age (Nielsen, 2009 as cited by Bondad-Brown et al, 2012) and the researchers observed younger people were more familiar with internet technology and more likely to entertain themselves with user-shared online video. They also observed it is difficult for audiences to search for and find video online. The survey was piloted in 2007, data was collected in 2009, but it was not until 2012 when the study was released. The researchers noted that there may have been many changes in audience behaviour since that time.

The current media environment offers an overwhelming amount of choice with the typical US household receiving well over 100 TV channels – but research reveals audiences are watching only a fraction of what they subscribe to (Taneja et al, 2012). Researchers noted it was unclear if the audience makes purposeful, rational choices when they consume content and that we need to better understand individual needs and preferences and how audiences manage media resources. In 2012, Taneja & Mamoria noted they were unaware of other research that had been published on measuring media consumption across different media and that at that time there was little behavioural data on cross-platform media use.

2.3 Research in the New Paradigm

In 2012, there begins to be more research looking at audience behavior in this new paradigm. Phalen & Ducey (2012) looked at existing research to help media managers understand the changing media landscape and audience behavior in this multi-screen environment. Research revealed viewers went online for convenience, to see past episodes, and when they missed an episode (Dennen as cited by Phalen and Ducey, 2012). Viewers are loyal to the content, not the medium or screen and may choose a computer screen over a television screen (Bughin & Livingstone as cited by Phalen and Ducey, 2012).

Research by Cha (2012) looked at U.S. college student use of internet and television, how they differ as platforms, and if the motives behind video content consumption differ between the platforms. A survey was distributed and revealed “motives for viewing the same genre of video content differ according to video platform types” (p. 189). The researcher found:

> *Entertainment, boredom, relief, habit, and social interaction motives influence intention to use television, … relaxation and getting updates on current events increase the likelihood of using the Internet as a video platform,… [and] there were no video genres that consumers tend to consume more by using the Internet rather than TV* (p. 196)… *The different characteristics of television and the Internet as video platforms do not play a significant role in determining what genres consumers watch using a particular video platform* (p. 198).

A 2014 report published in eMarketer looked at what digital screens viewers are using, frequency of use, and the impact of connected TV, and what it means if audience screen time among all age groups is still focused mainly on TV (Hallerman, Chadwick, Drole, & Rotondo, 2014). It was estimated that in 2014 adults in the US would consume daily an average of 5 hours and 23 minutes watching TV and digital video with 4 hours and 28 minutes of that time on a TV, 22 minutes on a computer, 20 minutes on a tablet, and 13 minutes on a smart phone (eMarketer as cited by Hallerman et al, 2014). In an article published by eMarketer, research shows "Canada's consumers watch considerably more digital video than their US counterparts" (Briggs, 2014, p. 3) with young millennials as the heaviest viewers.

In 2014, viewing data from the US Nielsen's first quarter reported on the ratio of hours different age groups watch TV for each hour of digital video they watch (as cited by Hallerman et al, 2014). For each hour of digital video they watched, adults 18 to 24 watched 5 hours of TV, adults 25 to 34 watched 9 hours of TV, adults 35 to 49 watched 14 hours of TV and adults 50 to 64 watched 23 hours of TV. Nielsen defined TV as either traditional linear (live) TV or time shifted (p. 3). According to Hallerman et al:

> *[The] television is still the dominant mode for watching TV content, new viewing patterns are emerging, fed by three factors. First is the growing usage of connected TVs. Second is the increasing availability of original content from nontraditional sources, such as Netflix or Amazon. The third factor is the binge-watching phenomenon, the clearest expression of audience desire to control how and when they watch content* (p. 5).

In a 2014 Admap article, Brennan (2014) says viewing choice remains complex. People watch TV when it is available and other devices when it is not. Live TV remains more attractive as it is more social, followed by on-demand. Wall Street Journal writer Trevor Fellows says, "it sounds simplistic, but viewers gravitate to the largest, most convenient device possible" (as cited by Hallerman et al, 2014, p. 8). Data from a 2013 survey revealed 40 percent of mobile device owners in the US viewed TV shows on a tablet compared to only 16 percent who viewed them on their smartphone. 35 percent used a tablet to watch movies compared to 11 percent that used a smartphone (Vubiquity & Frank N. Magid Associates, as cited by Hallerman et al, 2014, p. 8).

In an effort to learn from documentary audiences, De Rosa & Burgess (2014) conducted focus groups in five Canadian cities and the research was funded by the Ontario Media Development Corporation, Telefilm Canada, National Film Board, Canada Media Fund (CMF). A survey was also completed by just over 3200 people. The goals of the research were to conduct a market scan of documentaries for Canadian audiences, look at their transactional habits and "identify where, when, why and how documentary audiences are viewing and sharing documentary information and content" (p. 4). The data revealed documentary viewing is popular on all platforms and compared to three years ago, the respondents watch 68 percent watch more documentaries today. They also found viewing of documentaries would increase if there were more tools for discovery and promotion were available. The majority say access to Canadian documentaries is important, 90 percent shared their viewing experience with others, 47 percent say they would watch them if they were available to them, but only seven per cent say they can easily find them. Trusted sources like articles, reviews, and word of mouth influence the decision to watch them and are the most important when it comes to discovering new documentaries. In addition, the research revealed that "trailers are important to discovering and transacting docs" (p. 41), the "big screen experience is important" (p. 42) and "audiences seek curated selections and ease of use on all platforms" (p. 43).

In collecting data for a 2014 report that looked at how Canadians select TV series and movies, eight focus groups with participants between the age of 25 and 44 years were conducted in four cities in BC, Ontario and Quebec (Canada Media Fund, 2014). This industry study was commissioned by Telefilm Canada, the CMF and the Société de développement des entreprises culturelles. Research topics including viewing habits, equipment and services in homes, sources and the motivations for using each. They also looked at the decision making process for movies and series, knowledge and perceptions of English and French language Canadian industries, and how to encourage people to watch more Canadian content. Most of the behaviours reported tend toward on-demand viewing with participants creating their own schedule and watching content when and where they want. Live TV was identified as the main source for viewing but is losing ground to the PVR, free and paid streaming and, to a lesser degree, free download and VOD. Research revealed Netflix is abundant in Toronto and Vancouver and making its way into more bilingual households. Movies are watched mainly at home and the main selection criteria in the decision making process for movies is mood and genre followed by "actors, trailers, with whom watching, story/synopsis, word of mouth, reviews and recommendations" (p. 5). The order of importance in the decision making process and how the audience finds out about movies and are trailers/previews, word of mouth, internet, other advertising, recommendations and reviews, and box-office performance. In choosing TV series they discovered word of mouth and then ads were the most important for audiences. It is apparent that "in a context of proliferating content, tools are needed to simplify consumer choice" (p. 5).

A more recent study from the CMF was conducted in Montreal 2015 with two focus groups of 18 to 33 year olds who identified themselves as digital-only consumers. The study reports:

> *The overall audience for 'traditional media' – that is newspapers, magazines, radio or television accessed via either a physical support (paper, DVD) or a regulated broadcast media – is declining slowly, and many indicators suggest that the decline is more pronounced among the younger generations, specifically Millennials (born between 1980 and 1995) aged 16-34" (p.1). A defining characteristic of millennials is that they are the "first generation to grow up interconnected and tethered to electronic devices"* (p. 8).

The researchers noted "that some consumers today are not simply abandoning traditional platforms and turning towards digital content, they actually seem to know no other way to consume media but on digital platforms" (CMF, 2015, p. 28).

The CMF report found that in Canada, despite millennials consuming the most online video and TV, "discovering interesting and relevant content remains a chore, rendered more complex by the ever growing volume of possibilities" (p. 24) and they often find themselves overwhelmed by options. Participants expressed a lack of desire to own things and the majority said they used Adblock, a tool used to filter content and block advertising.

2.4 Audience Research in Europe

A Belgian study by De Meulenaere, Van den Broeck, & Lievens (2012) examined how viewers cope with an abundance of content and identified the factors applied when making choice. The study looked at how viewers applied an active search towards video content and found that the process is guided by content, context, and the individual - and that at the same time these can free and restrict the viewer in his or her choice. As part of the research, they evaluated a prototype of a recommender engine. They found in dealing with the overabundance of content, viewers often restrict their options. Peer recommendations play a significant role in decision-making and “digitally skilled and device literate viewers often choose to consume the same video content items” (p. 319). In general, they found the paradigm shift is mainly with the younger generations who are emerging as the new gatekeepers.

According to a UK study that observed how the audience selects shows, almost all viewing starts with live TV and the “preference is still to watch live TV on a big screen, even [with] young people” (Fletcher & Swadley, 2013, p. 16). The study revealed “smart TV owners and tech savvy people look for programmes first [and then go] to the channel with that content” (p. 16), the electronic programming guide “remains critical and is hard to supplant” (p. 17), and “the linear schedule is still important”(p. 17). The researchers predicted this may change if the best content is available via over-the-top (OTT) web-based delivery services like Netflix and “if it becomes cheap and easy to send content between screens” (p. 18). If getting on demand content on the television is quicker and easier, “on demand might leapfrog PVR in order of preference” (p, 18). They also predicted that if audiences move to on demand channels, brands could weaken and radical changes could occur if “social media becomes the way of finding out what is on” (p. 20).

Analysis of multi-screen behaviour in the UK reveals, TV is still the top screen despite audience using mobiles, tablets and laptops as they watch television (Ash, 2014). Millward Brown’s AdReaction data for 2014 (as cited by Ash, 2014) indicates the audience consumes 148 minutes of TV daily and that in the UK, TV is likely to remain the top screen. The impact on advertising is that though the marketing receptivity is higher for ads on TV screens than on digital screens, consumers still choose to skip commercials when they can.

2.5 Audience Research in Australia

A 2012 Australian government study examining audience motivation in a multi-screen world was a follow-up to a 2011 paper that looked at audiences in a multiscreen world. At the time of first study, audiences used many devices to watch shows but the TV was still the overall leading method of watching screen content (Screen Australia, 2011). The 2012 paper used focus groups and surveys to look at audience motivation in an effort to help develop a strategic plan for producers to connect with their audiences across all platforms (Screen Australia, 2012). The research found motivations can be summed up into three types: platform based (platform experience matters more than the show they are watching) content based (show matters more than method of watching) and integrated (where both platform and content matter in the decision making process). This study revealed more people are watching movies, TV drama and documentaries online and that in addition to depth of catalogue, they want control over when and how to watch it. A significant number of people are motivated by the ease of online viewing and rather than browsing, 70 percent search for a specific title. The researchers observed that social media networks offer a “strategic opportunity to build awareness as word of mouth evolves in speed and scale” (p. 3). Ninety percent of those surveyed felt it was important to have a local film and TV industry but that reaching the audience is challenging in the increasingly competitive multi-screen world.

Overall, there are similar findings in North America, Europe, and Australia – that TV is still the top screen; the audience wants more choice and control over what they watch; it is challenging to find content in the current abundance of media; and recommendations play an important role in audience choice.

2.6 Broadband Delivery and Emergence of the Over-The-Tops

Netflix and iTunes are two examples of video streaming services, also referred to as 0ver-the-top (OTT) services (Wolk, 2015). OTT refers to how the internet-based video is delivered, without a set-top box. Some services are subscription-video-on-demand, for example, Netflix or Amazon. And others like iTunes are referred to as transactional-video-on-demand. OTTs are now producing their own original content like the Netflix series, *House of Cards*.

Audiences use key words to search for specific content as the standard TV guide does not offer a search functionality (Scherf, 2010). This means that to help the audience find content, tagging is more important than ever. In the *Globe and Mail*, Ladurantaye & Berube (2013) report Netflix employs four taggers in an effort to help the audience choose content. With Netflix, "each subscriber gets a unique slate of movies and shows based on their viewing history, and the system generates categories specific to each account" (Ladurantaye & Berube, 2013) and as a result, 70 percent of the viewers choose what to watch based on what is suggested to them (Netflix as cited by Ladurantaye & Berube, 2013). Netflix is using the data to help decide and shape the content they will produce.

New technologies are enabling companies to better understand audiences and how to reach them. In a blog on the CMF's website, Samuel Bischoff (2015) writes, "the gradual delinearization of content broadcast across different screens has led to a surge in popularity for online recommendations, also known as content curation". Bischoff says this trend is linked to TV channels and broadcasters trying to retain their audiences and that recommendation tools and systems can help broadcasters better understand their viewers and build audience loyalty. There are two main models for recommendation systems – algorithms or content based filtering and human curating or collaborative filtering. Recommendation systems use social networks to find links between people and content "with these platforms acting like dating sites as they match viewers with shows" (Bischoff, 2015). The abundance of content makes it harder to find and choose a show, giving rise to what psychologist Barry Schwartz calls the 'paradox of choice' (as cited by Bischoff, 2015). The popularity of the automatic play of the next episode is therefore unsurprising.

While conducting research for an article that appeared in *The Atlantic*, Madrigal and Bogost, "…spent several weeks understanding, analyzing, and reverse-engineering how Netflix's vocabulary and grammar work" (Madrigal, 2014). They broke down the most popular descriptions, and counted the most popular cast and directors. They discovered "Netflix possesses not several hundred genres, or even several thousand, but 76,897 unique ways to describe types of movies". Netflix pays people to watch shows and tag them with metadata and then combines this data with their audience viewing habits. With 33 million streaming customers around the world, Netflix is using this data to better reach their audience and to create new programs (Gilbert, 2015).

When searching for shows to watch, "Netflix is famous for the recommendation algorithms that continually point you to shows that people with your viewing habits tend to enjoy

[so] …it's hard to remember there's a whole, diverse world waiting outside it" (Oremus, 2015). But channel-surfing can expose the audience to unexpected viewing experiences that would never have risen to the top of their Netflix list.

TV critic Matthew Gilbert (2013) reports Amazon is posting TV pilots and soliciting audience feedback to assist executives with making final decisions as to which series to order as it moves forward with its own original programming. Gilbert says that while understanding audience motivation can be helpful, it could lead to formulaic engineering of shows based on audience preferences for cast, crew, and storylines. While the concept is "kind of cool" he says "it's also kind of creepy" and asks "do we really want TV shows made in our own image, based on our online profiles?".

When it comes to online recommendations, Bischoff (2015) says there are some questions that we need to ask:

> *Should we give preference to national content? What type of dialogue should be initiated with users? The current trend towards "hyper choice" hides a lack of information on cultural products and makes it more difficult to discover shows that you may enjoy. In fact, access to content and technological support are not enough to meet the challenge of discoverability: appropriate promotion of online consumption has therefore become necessary".*

2.7 Is TV Dead?

A blog about screen convergence on the CMF website reported that around the world all age groups are watching more content and that there is an increasing demand from consumers for "unbundling and IP distribution in replacement of cable and satellite services" (Archambault, 2015). This has resulted in lots of pressure on the existing revenue models used in the content production sector. As "… television does web and web does television, films can be viewed on all media supports and television series have become much more complex and sophisticated" (Archambault, 2015).

In an article that appeared in *The New York Times*, Stelter writes that Nielsen data released in early 2012 reveals "Americans ages 12 to 34 are spending less time in front of TV sets, even as those 35 and older are spending more" (Nielsen as cited by Stelter, 2012) and "young people are still watching the same shows, but they are streaming them on computers and phones" (Stelter, 2012). According to Nielsen, television viewing as a whole is steady, because older Americans are watching more than ever before. This is largely due to PVRs as people stockpile shows resulting in the proportion of live viewing shrinking while time-shifted viewing is expanding. According to Stelter, "television shows on the iPad are still television, but to Nielsen, it's not: the company counts computer and mobile streams of shows separately, making it difficult for the television industry to get a handle on changing habits".

Kho (2011) predicted that in the future, audiences will move away from traditional TV and radio broadcast channels in favor of alternate video platforms like smart TVs, set-top boxes, and VOD. As audiences become more accustomed to multiple screen options, many choose not to subscribe to cable as they access on demand content through broadband. A report from the Convergence Consulting Group says 80 percent more people cut the cord to traditional TV in 2015 than in 2014 and that Netflix subscriptions increased by 58 percent in 2015 compared to 2013 (as cited by Harris, 2016). However, while the number of internet subscribers continues to grow in Canada (Eiley as cited by Harris, 2016) most homes subscribe to traditional TV (Harris, 2016). CBC's Pete Evans reported in early 2015, that Nielsen ratings data shows traditional TV viewership is declining as audiences are using streaming video services and that we should expect to see exponential growth in streaming video.

Andrew Green (2014) says TV is still the dominating mass medium - and it can be viewed on many screens at any time. In this multi-platform environment, advertisers need to embrace new platforms as it is harder to reach the mass audiences that TV used to reach. While the number of commercials during a typical hour of television has increased, while the audience for them has not. In 2009 the broadcast network average was 13 minutes and 25 seconds, and for cable networks, it was 14 minute and 27 seconds (Nielsen as cited by Flint, 2014). By 2013, it increased to 14 minutes and 15 seconds for broadcast networks and 15 minutes and 38 seconds for cable networks. And, while the number of 30-second spots has decreased, audiences are exposed to even more commercials as the number of 15-second spots has increased (Flint, 2015). Non-skippable VOD has fewer commercials than live TV and research shows audiences are watching them (Flomenbaum, 2014). Overall, viewers are watching more television than ever but watching less of it live, preferring to fast forward through or avoid commercials and causing advertising revenues to decline (Wolk, 2015).

Though traditional television dominates in the UK, viewers doubled the amount of time they spent streaming in 2015 compared to 2014 (Sweney, 2016). Subscription-based-video-on-demand services accounted to 4 percent of the content the average person watched in 2016 and traditional television viewing accounted for 76 percent.

According to Michael Wolff (2015), author of *Television Is The New Television: The Unexpected Triumph Of Old Media In The Digital Age* the TV industry has managed the transition to digital better than music and publishing. He says that even though many of us think we are cutting the cord, we still have a cable into our homes. Cable companies are the main providers of digital access. Netflix is now partnering with cable, TV comes to the computer, the web comes to TV, everything comes to the house via a cable and we are dependent on the broadband owner who maintains the TV monopoly. Over-the-top (OTT) service providers, who deliver content over the internet via broadband like Netflix, have become a way to bring more TV to TV as our devices allow us to watch more TV on our TV. TV has evolved from the advertising model of free broadcast TV to paid cable, and now paid premium (with providers like HBO and Netflix) and the future will see us move to more of a broadband delivery system.

The reality is that "we now live in a world where every device is a television … [and] TV is just becoming video," says Richard Greenfield, a media and technology analyst for the New York-based B.T.I.G (as cited by Auletta, 2014). Even Netflix refers to some of its content as TV shows. A report from *Stream Daily* cites Ted Sarandos saying "Netflix's TV-to-film ratio is 70/30" referring to serialized shows (Kuburas, 2014). In an article from *The Guardian*, author Jane Martinson (2015) refers to Sarandos as "the on-demand TV service's chief content officer".

Netflix's opinion is that Internet TV is going to replace linear TV and apps will replace channels, remote controls will disappear and screens will proliferate (Netflix, 2016). Reed Hastings, C.E.O. of Netflix, predicts that by 2016, half of all TV will be delivered via the Internet (as cited by Auletta, 2014) and in ten years TV will be 100 percent streamed (Andreeson as cited by Green, 2014).

In his book, *Over the Top: How The Internet Is (Slowly but Surely) Changing The Television Industry*, Alan Wolk (2015) says that the value of ownership is fading and many no longer want to download as streaming files don't take up space and audiences have access to vast catalogues. Challenges still exist with the interface, moving back and forth between internet delivery and TV. Wolk predicts that in the future bandwidth will keep increasing and television will become more personalized, more diverse with more niche content, with even more content available. The reality is TV is not dead, it's just different (Fletcher & Swadley, 2013; Wolf, 2015).

2.8 The Problem of Discovery

Tessa Sproule (2016), the former director of digital at CBC, in a radio interview with CBC *Spark*'s Nora Young, says that one of the problems no one has been able to crack is the problem of discovery. Sproule also says there is an appearance of self-directed choice but the reality is that algorithms make suggestions and she questions if we think we really are making our own choices. In the same program, Young also interviewed Amanada Lotz, author of *Understanding Media Industries*, who says companies like Netflix have accelerated audiences to a different way of viewing. As we move to a model where audiences pay for something they can't get anywhere else, how we are watching long form scripted series has changed (Lotz as interviewed by Young, 2016). Lotz also says streaming services are competing to grab exclusive content and create their own content. The reality is that we have to subscribe to many different services to get what we want.

The Canada Media Producers Association (CMPA, 2015) says we are "in a world where choice is infinite and the viewer now controls when, what and where to consume content" (p. 17) but does the viewer really have control? There is no doubt that the "primary challenge facing industry is discoverability in the overcrowded market place" (p. 17).

With a primary goal of preventing piracy, "Where to Watch" was launched in 2014 in the US with a goal of preventing piracy and helping audiences find shows by searching through catalogues of content providers (Bischoff, 2015). They did try to launch a similar site in Canada but it does not feature the recommendation tool and just lists the service providers so the user must go to individual provider's website to look for content.

2.9 Future Research

As the way audiences consume content continues to change, industry has been slow to respond to develop new monitoring systems (c.f. Bischoff, 2015; Green, 2014; Napoli, 2012; Stelter, 2012). New methods need to be developed as current methods don't reflect the reality of how audiences consume content (Bischoff, 2015; Napoli, 2012).

Philip Napoli (2012) says that media and audience fragmentation is a result of technology and audience autonomy. He says audience research is not up to date as TV viewing also happens on platforms that are not measured and have no established measurement system in place. Existing measurements don't take into account that viewing does not happen all at once and may occur for years after content is released. He says we do not really know how audiences consume programs and that in the future we need to spend more time looking at how audiences become aware of their content options and in what ways they are engaged with content.

According to Comscore (2013), the reality is "this paradigm of multi-platform digital media consumption is breeding complexity, disrupting the established media infrastructure, and creating uncertainty about what tomorrow might bring" (p. 5). Overall, there is limited research on this topic in the current paradigm. With this in mind, how does the audience make the decision to watch shows? To answer this, two key studies that were presented in the literature review were expanded upon. The first is the 2014 study by the Canada Media Fund (CMF) that used focus groups to examine how Canadians select movies and TV series. They had participants complete a waiting room survey and had them record what they watched for one week. The second is a 2012 study by Screen Australia that used focus groups and a survey to look at audience motivation in a multi-screen environment. The intent with the current research is to build upon these studies and focus more on the how the audience discovers or finds shows and how they make the actual decision to watch.

Chapter 3. Research Design and Methodology

The purpose of this study is to better understand how audience make choice in a multi-screen environment with an abundance of media. I also want to know what screens they prefer and why. The mixed mode research project employs a cross-sectional design and explores the factors around audience content-related decisions. The research will be qualitative and exploratory. This section start with the rationale for chosing my methods, followed by the selection and recruitment process and a brief overview of the three methods (viewer-tracking log, survey and the main method - focus groups). This chapter ends with how the data will be analyzed.

3.1 Rationale for Methods and Approach

Data for this study has been gathered using three methods: survey, viewer tracking log with focus groups as the main method. These methods were also used by a Canada Media Fund study in 2014, as mentioned in the literature review. I wanted to build on this research and look specifically at behavior in Alberta. These methods were piloted in December of 2015 to obtain feedback and help shape the questions to more effectively measure the respondent's attitudes. Focus groups were chosen as the main method to collect data as this method also provides a fast, economical and efficient way of gathering data from multiple people at the same time (Krueger & Casey, 2000). Focus groups enable the collection of rich and detailed data (Carey, M.A. & Asbury, J., 2012) and "group formats tend to stimulate a greater variety of feedback as a result of brainstorming" (Merrigan, G., Huston, C.L., & Johnston, R., 2012, p. 112). They also provide an opportunity to explore and dig deeper, allow for spontaneity by following the conversation in the direction it naturally moves in. This enables participants to build off of each others knowledge. In focus groups the "conversation is usually very engaging and leads to rich stories that likely would not be told in such detail in another type of study" (Carey, M.A. & Asbury, J., 2012, p. 16). The range and type of data generated from group interaction can be deeper and richer than data gathered from one-on-one interviews (Thomas, MacMillan, McColl, Hale & Bond, 1995).

3.2 Participant Selection and Recruitment Process

Participants were recruited non-randomly using snowball, convenience and purposive sampling methods by an invitation distributed by email and social media posts on Facebook. The invitation included a brief description of the study, inclusion criteria, a request for volunteer participants, focus group dates and times, and a request to share or forward the invitation and contact information for the researcher. The researcher then followed up with interested participants and provided them with more detailed information, confirmed inclusion criteria, introduced the homework assignment for participants (see Appendix A, Viewer tracking log), and to help clarify what was being asked of them, forwarded the consent form (see Appendix B).

Participants were selected by age, gender, a specified minimum level of content consumption, having an interest in contributing to research and something to say about the topic. They had to fit into either the 18 to 35 year old millennial age category or the 36 to 55 year old age category, had to have viewed on average at least five hours of shows per week and be available to participate in Edmonton on the specified dates. For this study, I chose not to look at under 18 years of age and over 55 years of age. I chose to look at 18 to 35 years olds and 36 to

55 year olds to see if there was a difference between the two age groups in behaviour and the way they choose shows.

Millennials were chosen as one of the age groups as in the literature, they are looked at as being different. They are the “first generation to grow up interconnected and tethered to electronic devices” (Canada Media Fund, 2015, p. 8). They were born between the years of 1980 and 1995 and according the Canada Media Fund (CMF), younger millenials in Canada consume the most online video and TV (2015). The CMF also reported “they are also spending less time watching traditional TV than the other cohorts” (p.6).

Group size is suggested at between six and ten participants to keep it manageable but at the same time large enough to obtain variety in perspectives (Kruger and Casey, 2000). Ten participants were invited to participate in each group, with the expectation that some may cancel or not all may show. This number was chosen as a “small number usually leads to a greater depth of data, and small groups size is especially important for sensitive, complex topics” (Carey, M.A. & Asbury, J., 2012, p. 45).

3.3 Viewer-Tracking Log

To get participants thinking about methods and screens and to give the researcher a better understanding of the participant’s current behaviour, a “viewer-tracking log” was distributed prior to the focus group sessions. Before coming to the group, participants were asked to track their viewing over a seven day period and to self report the following: what did they watch; when did they watch it; what screen did they watch it on; did they watch it live, recorded, streamed, downloaded, on-demand, or other (and to specify); what kind of show was it (movie, drama, documentary, comedy, movie); if it was a series how many episodes they watched; and the total time they watched for.

3.4 Brief Overview of the Focus Group Plan and Survey

Two hours were scheduled for each focus group session. A semi-structured format was selected to allow the researcher to follow the conversation in directions that it naturally moved in, allowing for more spontaneity and for the participants to build off the knowledge of each other. A cross sectional design was implemented in the focus groups that looked at influences, and how the audience makes content related decisions.

The sessions were designed to begin with a review of the agenda, review of the consent form (including asking for permission to record the session), and distribution of a survey (see Appendix C). The intent of the two-page survey is to better understand the participants, to gain awareness as to what equipment and services they have access to, to get them thinking about their own behaviour and the topic they were about to discuss, and to cover some questions in advance of the actual group conversation. It begins with asking about the screens, devices and services they have in their homes and what methods and screens they use most frequently. It also asks about their behavior before and after watching shows. It ends with asking demographic questions about gender, age and questions to help determine if they are device literate and digitally skilled. A combination of nominal (for example, gender and age), and ordinal (for example, scale or ranking of order) measurements were applied.

The focus group was scripted to first ask about the methods participants felt were the most common for watching shows and why; what people watch on different screens and why;

screens people prefer and why; what kinds of shows people watch via live TV and why; and if people differentiate between different delivery methods. The next section looks at behaviour and criteria including how the audience finds shows and makes decisions; how they become aware of shows; motivational criteria, and the search or navigation systems they use. The focus group will end with asking about the future and what the participants see as an ideal future (See Appendix D, Focus Group Script).

3.5 Analysis

The audio recordings of both focus groups will be recorded and then later transcribed. The researcher will also record thoughts and observations at the end of each focus group session. The researcher will review the transcripts, listen to the recordings and look for themes. A thematic analysis will be conducted to "to broadly identify, analyze, and describe patterns or themes (Carey & Asbury, p. 83). The majority of the data is qualitative in nature and given the size of the study, results can't be statistically generalized to represent the population at large.

Chapter 4. Findings:

This section begins with a review of the process; provides a participant profile; followed by a summary of the survey and viewer-tracking sheet; and then a presentation of the main data, the findings from the focus group.

Two focus groups were held in 2016 in Edmonton, Canada with the “35 and Under” group taking place on March 30th, and the “Over 35” on April 12th. Participants completed the viewer-tracking sheet in advance and the survey at the start of the focus group. The focus group began with a brief introduction (including the purpose of the research) and a review of the agenda. The participants gave their consent to participate and to use the data from the session, survey and viewer-tracking sheet. Each two-hour session was recorded and later transcribed, each session by a different transcriber. (Transcriptions from both sessions are presented in Appendix G).

Immediately following each session, the researcher made notes. The researcher later listened to both recording several times, examined the transcriptions and looked for differences and commonalities within and between the groups. Transcribers noted when a participant was speaking and when the researcher was speaking.

The research is exploratory and uses convenience sampling. Data is descriptive and qualitative providing a snapshot of participant behaviours. This section begins with a profile of the participants, followed by findings from data gathered in the survey, viewer-tracking sheet, and focus group sessions.

4.1 Participant Profile:

Age range in the 35 and Under age group was 22 to 35 years and in the Over 35 group, 41 to 55 years and both consisted of a balance of men and women. The 35 and Under group consisted of ten participants and the Over 35 consisted of nine. It was not planned, but the 35 and Under group was more diverse and represented more languages than the Over 35 Group.

4.2 Survey

With permission, this data was completed at the start (after reviewing the agenda and consent form) and collected at the end of the session (see Appendix E, Survey Summary). Based on information provided in the survey, when asked “what screen so you have in your home on which you can watch screens?”, the majority of both age groups indicated they had flat screen TVs, personal computers, smart phones. At least half of both groups also had smart TVs. A few in the Over 35 group had “tube TVs” and a few in both groups had tablets. Both groups indicated that the screen they watch the most is the TV. Additional devices in the homes of both groups included PVR, DVD player, game console, Apple TV, and projector. The 35 and Under group also listed satellite dish and VHS player, but the Over 35 group did not. The majority of both groups subscribe to internet, video streaming and cable. Methods used by both age groups to watch shows include live TV, streaming, playback on DVR, DVD, pay-per-view (PPV), movie theatre, downloaded, projected, and VHS. The most popular method to watch shows with the 35 and Under group was streaming followed by live TV and then PVR. With the Over 35 age group, the most popular method indicated was live TV, followed by streaming and then PVR.

The survey also asked participants about their behavior before and after watching shows. The majority in both groups indicated that before choosing to watch shows they followed advice from family and friends, they had seen an advertising promo/clip or trailer, read posts on social media sites, browsed or surfed to find something to watch, seen an interview with cast/crew or read a review. After watching shows the majority of both groups indicated they talked about it with family or friends and posted a comment on a social networking site. All of the participants from both groups responded that they had the devices required to watch shows online and the majority said they were very comfortable with using online technology to watch shows.

4.3 Viewer-Tracking Sheet

The Viewer-Tracking sheet was completed in advance of the focus group by eight of the ten participants in the 35 and Under group and eight of the nine participants in the Over 35 group (see Appendix F, Summary of Viewer-Tracking Sheets).

Self-reported behaviour on the tracking sheet indicated TV was the most common screen for watching shows with both groups. The most common method for 35 and Under was streaming, followed by playback on PVR and for the Over 35, live TV was the most common method followed by playback on PVR and streaming. Participant’s time tracked watching shows for the week prior to the focus group ranged from 5.5 to 36 hours.

4.4 Focus Group Sessions

The main purpose of the focus groups was to better understand how and why people choose to watch shows. Focus group excerpts from the transcripts are presented in this section.

The following information provides some context as to how the audience is reacting in a multi-screen environment with an abundance of choice.

This section begins with looking at the methods and screens, explored what participants liked and disliked about each, focused at the start on playback on PVR, live TV, streaming and watching at a movie theatre. This is followed by discussion about advertising and commercials, cost, bundles and packages from service providers, preferred screen, search and navigation, finding out about shows, criteria, and binge viewing. This section ends with findings from discussion about the future.

4.4.1 Preferred Methods.

The discussion began with a discussion about the most common methods people use to watch shows and what people like about these methods.

4.4.1.2 Playback On the Personal Video Recorder

Both groups talked about playback on the personal video recorder (PVR) and what they liked most about this method.

- *It's one of those devices that every single persons got and is like 'ahh this changed the way I watch TV' and you can just record whatever you want and throw on whatever you have recorded.*
- *You put on your PVR [anything] you don't want to miss.*
- *I use my PVR a lot, especially for shows that are airing. I pay for cable so I'll PVR things and watch it on the big TV when I get the option … because you can skip the ads.*

- *[Live TV and PVR] are pretty close. What I do a lot of times especially for football or hockey [is that] I'll purposely tune in an hour late so I can just zip through the commercials. Essentially, most times I catch up.*

4.4.1.3 Live TV.

Both groups commented that immediacy was one of the main reasons for watching news, sports and some shows during their live TV broadcast.

- *Nobody wants to watch the game after it's already over.*
- *I think there's still a large portion watching sports. The only way to still watch it decently is on live television or PVR … Six months from now we might all have different answers because it is going fast and very quickly to all streaming.*
- *I would way rather get my news from the [live] television than googling it later or trying to find it online.*

Participants in both groups talked about live TV as background where they may be listening to it, not always focused on it, not always watching it and/or having it on while doing something else.

- *If I want to watch this show I'll do PVR or On-Demand from Shaw but if it's live TV it's usually like I'm cleaning the living room so let's put on the [show] People's Court. A lot of the shows that I have on are like background…like news, like I don't need the visual of [the show] Judge Judy.*
- *You listen to [news], you don't necessarily have to be looking at the talking heads.*

- *You pick a channel and it's on for hours on the same channel, you're not viewing anything.*

During the live TV discussion, participants in both age groups indicated that sometimes they perform other tasks while watching a show and that sometimes their watching is unintentional.

- *[I watch] reality and the cooking stuff when I'm in the kitchen … it's just stuff I don't really have to pay attention to so that's why I throw it on.*
- *A lot of the things I watch are unintentional because when I'm preparing dinner, I'm looking right onto the TV. ... Weekdays the CTV morning news [is]on the TV in our bedroom so I watch snippets as I'm getting ready for work.*

Participants also talked about the social aspect of watching some shows during the live broadcast.

- *Walking Dead is the only show that gets watched [live] on cable at our house [and our teenage daughter has to sequester herself] to watch the serial show at that moment [so she can talk about it in real-time with her friends via social media].*
- *AMC really pursues [social media] and has a story sync that can match up with your tweets and they see the other tweets and they constantly tweet through the whole thing… so there's a social element".*
- *It's interactive, you're talking with your friends.*
- *I don't watch sports very often but when I do there's a group watching and you're cheering together.*

4.4.1.4 Watching at a Movie Theatre.

Both groups discussed watching movies at a movie theatre and had similar comments as to why people chose this method. Reasons for choosing this screen included the social element, image and sound quality.

- *People still go out on the weekends, have those nights out and go watch movies.*
- *Visual effects are very appreciated on the big screen. You know 3D, you get all those things that make you appreciate the movie even better and at the same time you … step out of your house and have some excuse to socialize".*
- *For big movies like superhero movies and stuff, they could like illegally download it for a very bad copy online but most people will be like 'no I want to see that on the big screen'.*
- *For a big budget blockbuster… , The Force Awakens comes to mind, … I don't know anyone who downloaded it illegally because they wanted to see it on the big screen.*
- *For some films there is something about going with an audience. You want that audience reaction. And the popcorn.*
- *There's the sound and quality.*
- *For some shows that are epic, you want that big experience.*

In the Over 35 group, two participants talked about watching movies at the theatre versus the home theatre environment.

- *I choose to go to movie theatres because I am easily distracted and even if I'm watching a movie at home on the big screen I have my computer in front of me, doing things here, pause it, run upstairs, go to do the laundry, come back. I love the movie theatre because I can't do that, I'm watching this movie, I paid for this movie.*

- *I can't stand the etiquette of other people now at theatres. Whether they're on their phone, or talking, they think they're in their living room and they can carry on a conversation. To me that is so annoying. I want control over my environment and the best way for me to have control over my environment and still try and replicate the experience is to have a big screen at home and watch that.*

4.4.1.5 Streaming.

When discussing streaming, participants focused mainly on subscription-streaming services and what they liked and disliked about them.

- *People like Netflix for a reason - easy use and accessibility.*
- *I think people are a lot more busy … They don't have time for cable. Why pay for something you're not going to watch? Or they will watch it on their laptop or DVD. They don't want to record. It's too much of their time.*
- *I would pick a Blu-ray over streaming…[it's a] better experience.*
- *There's still a reliability factor that broadband and internet doesn't always have. The picture isn't always that good. Sometimes … it depends on how many other users are using it at the same time in your neighbourhood, then quality dips.*

In the 35 and Under group one participant views shows mainly on the iPhone and stated:

- *I don't have an actual TV. So I just do Netflix and sometimes iTunes… A lot of people I know have just never had TV or cable, just kind of old punk rocker.*

4.4.2 Delivery Method.

When asked if they thought about delivery method including platform, most of the participants said they do not. They often chose "*whatever is easiest"* and one that offers "*convenience"*.

- *If they all came from one source, nobody would even notice, but you're forced to choose a source right now.*
- *I'll go for digital more than anything just cause I'm spoiled and the fact that it works instantly.*
- *I'm not really aware of that unless it's something that I had to go through a lot of effort to set up.*
- *People just want to watch a show.*

4.4.3 Advertising and Commercials.

Participants in both groups commented they would prefer not to have commercials and are willing to pay for content to avoid them. The conversation came back many times throughout the focus group to commercials.

- *If it's live TV we suffer the ads.*
- *Everybody hates commercials.*
- *If you had the choice, who would want to watch commercials?*
- *I hate ads, I'll skip everything I can. Or if I'm just watching live TV, with PVR you can pause live TV [and then skip the ads].*

Of note, the 35 and Under group talked about the content of the commercials and product placement but the Over 35 did not.

- *It's annoying that a lot of the ads don't have anything to do with the show.*
- *I do like some…It would be nice if they were relevant to the show you were watching.*
- *The problem isn't so much that people don't want to watch ads, it's just the ads suck. They're boring.*
- *Product placement has gone so over the top.*
- *I don't like being taken out of the experience I'm more happy with more subtle product placement.*

Both groups seemed willing to accept a certain amount of advertising if there was less of it. When asked how they felt about some of the cable on-demand content that had fewer commercial spots than live TV, one participant responded:

- *I would be happy with one or two, I don't like product placement, I also don't like commercials but I wouldn't mind a few commercials as long as its not 5 minutes. As long as I'm not sitting there waiting and waiting.*

However, on this point another responded:

- *Crackle originally had the 30-second spot at the beginning and then one or two during the commercial breaks. Now they're up to five in the commercial breaks. It's like watching regular TV on Crackle. It's free on your Apple TV but now they've got so many commercials that I don't even bother.*

4.4.4 Cost.

When asked if cost impacts how they choose to watch shows, the majority of participants Over 35 said '*no*' but not everyone agreed.

- *When you went to the Blockbuster [rental shop] for shows, I spent a lot more in a year than I do now.*
- *It has been ingrained that this is a necessity so it's just like paying your light bill, right.*
- *There are people who sort of look at it as our entertainment dollars.*
- *I watch content on three to four channels. I don't want [the show] Dancing with the Stars, I don't want all that stuff but you buy it in blocks still so you can't choose, okay I want this channel, so I have to pay for five I don't even want.*

Opinion of the 35 and Under is that cost is more of an issue, though in this group a few also said it was not.

- *Even [with] PVR it doesn't feel like I'm getting value for my cable … [I'm] paying for a ton of channels I never watch ever.*
- *I don't really watch a lot of stuff and it seemed ridiculous to have to get all of this to just have one channel.*
- *Why pay for something you're not going to watch*
- *Money doesn't matter. The cost… is not a big deal.*

In both groups most participants were willing to pay for premium content to get access to content on channels like HBO:

- *The only reason why we haven't cable cut is because of [the series] Game of Thrones.*

4.4.5 Bundles and Packages from Service Providers.

People in both groups commented that they do not like being forced into packages and the limitations of cable. There was no disagreement with these statements.

- *Even if you are not interested in watching TV the package that Shaw offers you can come in groups like TV, cable and internet so if you want only internet they will tell you 'no you need to have this package which already includes the TV or the telephone'. They force you into a bundle.*
- *I can access Shaw TV but I can only do it on a phone or tablet, I can't actually watch it on my TV through Apple TV or send it to my TV and it's like 'what's the difference? I'm still watching your programs on a subscriber account'. It's that mindset that 'no you have to be there at that time when you say you're going to show up at that time you have to be there for that'.*
- *There's still things that they don't do that well and cost does become a factor too because the skinny cable package well now it's an extra five dollars for each channel. Well that's more than I was paying before for 20 channels, 40 channels that I don't watch… They're going to make their money.*
- *Cable-on-demand … will have like half a season. And if it's on Netflix then we're always going to do Netflix cause it has the whole seasons. Shaw has like six episodes of American Horror Story and that's annoying.*

4.4.6 Preferred Screen.

Many participants in both group talked about when they were home, that the large TV screen was the preferred screen. They often watch it with others and there is better sound and picture quality.

- *I prefer the big screen on any of them … why would I use my tablet or my smartphone when I have [the big screen TV].*
- *Big screen for movies, husband likes it for sports, news would be just on my little TV because that's convenient …and in the kitchen [while cooking or doing the dishes].*
- *Now you've got your home theatre and you can on-demand, pay per view, Netflix you know you can call up a movie, let's see what we want to watch.*
- *When the big screen is busy or you want to watch by yourself, you may watch on a smart phone, tablet or computer.*

Participants talked about when they use tablets for watching shows.

- *We would use the tablet when we travel, we'll download stuff to watch.*
- *A lot of people watch movies on tablets. At least my sister, one of her primary methods of watching things is her iPad.*
- *All the people I know that have little kids give [them] tablets.*
- *[I use the tablet at home] when my son's downstairs on the big screen.*
- *I've shared laptops and screening tablets when the others aren't available. On trips … I'll watch things with … whoever I happen to be with.*

The 35 and Under group talked about watching shows on smart phones:

- *"I would say phone screen people use the most because whatever they want whatever they think about watching something, just go on there."*
- *"Almost anything I watch is on my iPhone cause the only time I have time is if I'm doing the dishes or doing stuff so it goes with me. "*
- *"[Netflix] is horrible to watch on a phone"*

4.4.7 Search and Navigation.

In an abundance of media, how does the audience find shows? Both groups talked about navigating their way through content and how difficult it can be to find shows to watch.

- *There's so much you just can't consume it all.*
- *Too much choice.*
- *A lot of noise.*
- *You're inundated with so much stuff.*

Both groups indicated that there is not a current search and navigation system that is working the way they want it to.

- *You get on the internet and it's just this giant maze of how do I use or where do I click to go down and then if your frustration level is high you're not going to get very far and you wind up nowhere, nothing that you want to watch is showing up.*
- *I think it would be better if they had more categories and a definite list, and it was easier to find things. I find it really irritating to navigate when you have an idea of what you*

want to watch. If I want to watch French films it's like "where are they?", it's so hard to find anything on there.

- *I think how many times I've gone through Crave TV, I've gone through Crackle, I've gone through Netflix, I've gone through on-demand and it's been an hour and I can't find anything that I want to watch. I just wind up watching a rerun of [the series] Big Bang Theory because I just give up.*

When asked "how much time do you spend searching?" participants in both groups noted that unless they have something specific in mind that they want to see, that they can spend a lot of time looking for something to watch.

- *I spend up to an hour trying to find something.*
- *I find when I'm looking at Netflix I spend more time looking for a show than I do watching it and there's nothing there that I really want to see.*

4.4.8 Search Engine Recommendations, Tips and Tools.

Both groups seemed to be split between those who liked search engine recommendations and those who did not.

- *Fortunately they put up the 'you might like', and I'm actually grateful for that.*
- *I can go on Netflix and it actually knows what I want to watch.*
- *It's based on your habits. You watched this so you might like this, or if I go and I click on a show and it shows me four other ones that have the same sort of attributes, the same sort of features.*
- *From my experience, the more you use them the more they learn right, the better they get.*

- *I don't know if I personally think the [Netflix] algorithm's bad, I just think it's super aggressive and I kind of get angry when I'm like 'no I don't want to watch that, go away, stop it'. If they had more content it would be much better.*
- *I think that's a little bit of manipulation there too it's a way of big companies trying to tell you what to watch by recommending it.*
- *Netflix works almost to a T but if there's a program that they're pushing, one of their original content shows come up no matter what you're watching. If you watch everything it will still pop up [and recommend their show] for you.*

Participants talked about what search tools are working when it comes to finding shows.

- *It really has to be genre or it has to be categorized… big buckets, either that or I can't, it just kills me.*
- *Youtube is Google, it is the best search. .. The top of it is very broad, it's very important to have stuff that way so you can drill down very quickly, one giant bucket to thousands…it's popularity too. If three million like this and this one only got a hundred thousand views, then there's something about this that makes it better than that.*
- *The other night we really wanted to watch a horror movie. So I Googled 10 best horror movies in the 10 last years and we found one and we liked it. We do that all the time.*
- *[iTunes has] the biggest selection of any TV show and movie, [and] you pay like a video store for each individual viewing.*

Both groups shared tips with other participants as to how to make the search process easier.

- *Get a wireless keyboard … and type it in, use the little arrow keys and choose. That's my remote now.*
- *Shaw [has] a clunky interface and so now I've gone on my phone and figured it out from here because better search and faster search and I go and find it.*
- *There's an app now that I just downloaded called Cheap Charts and I can look and see what goes on sale at iTunes… that there's a lot of apps that are clearing the milieu of all the stuff to watch.*

There were several participants in the 35 and Under group who immigrated to Canada. When asked "how do you find shows in your first language" the response was:

- *It's a little bit difficult… I find it hard to find French movies.*
- *We have a website streamer where we can find a lot of foreign movies. We get a lot of Spanish movies from even 30 to 40 years ago.*

4.4.9 Marketing Synopsis, Packaging, Trailers and Branding.

Marketing, synopsis, packaging, trailers and branding can also influence choice.

- *Marketing let's you know that it's on and maybe I'll go check out a show if I know that its there, it doesn't necessarily tell me anything more than that show is playing now. But I might be more inclined to look up and search what it is if I see it on TV*
- *The synopsis or trailer are really important because your in this era of information.*
- *I look for directors that I like and I look for story.*

- *I think also brand like whether it's attached to a name. So lets say The Hateful Eight by Quentin Tarantino. A lot of people just saw it because it was a Tarantino movie or like Star Wars the Force Awakens.*

4.4.10 Word of Mouth, Reviews and Social Media.

Both groups discussed word of mouth, peer recommendations and professional reviews as being important.

- *You have a bunch of friends who are talking and posting about something you're going to want to know what the fuss is all about.*
- *You hear about it from friends or people that [say], 'you have to see this'.*
- *I like reviews from well-known critics.*
- *I've got to watch the movies that are [Oscar]nominated.*
- *I still go to see … the last video store guy left and … I say, 'What's good, what do you recommend?' And for me that's an incredible way to get new [titles].*

Participants also talked about the importance of synopsis, artwork, and packaging.

- *You can flip through [the on screen cable guide] and go down and see a description, if something catches your eye see if you like it.*
- *I look first at the pictures and then I read the synopsis. The pictures are extremely important.*

4.4.11 Additional Criteria.

When asked about some of the other criteria that are important when choosing shows to watch, participants in both groups talked about mood, how much time available, location, and who you are watching it with.

4.4.11.1 Mood and Time Available.

- *For me personally I have to think first what kind of mood I'm in and if I'm in a down mood or [want to] laugh then … I know I want something that's comedy'.*
- *It depends on how I feel, depends on my mood … or [I may want] just something short that I don't have to sit for an hour to really watch.*

4.4.11.2 Location.

- *The [flat TV screen] in my bedroom … with my dog…[because] its very comfortable and I am away from anyone else.*
- *My smart TV is in the living room and usually that's when you're watching with the family and so it has to be more mainstream because everybody has to agree on it. The little TV in the office is generally where I watch the news and the iPad is later in the evening when I go to my bedroom and I can start streaming and vegging out on House of Cards or stuff like that.*
- *In our basement we have the projector screen and if I'm going to be watching a movie, I'm watching it down there with surround sound … News it's a little tiny tube tv in my kitchen.*
- *For me my TV is downstairs, so if I want to do anything upstairs it has to be on my laptop.*

- *When your co-viewing like with a family member or partner you have to [agree] on something to watch.*

4.4.12 Binge Viewing.

The Over 35 did not discuss this topic but the 35 and Under group did.

- *[With the PVR] … you can record your whole series and then binge watch like you [can] on Netflix.*
- *It's here to stay because you couldn't really do it before.*
- *There are shows that are written to take advantage of format and the platform that they're made for.*
- *I don't think even fifteen years ago Breaking Bad or Madmen would have been as successful as people weren't able to PVR or go on Netflix and catch up.*

4.4.13 The Future.

The focus group was scripted to end with a further conversation about the future. Both groups talked about an ideal world when it comes to finding content.

- *[It]depends how content curation adapts from live television and online cause its still not perfect online.*
- *[I want] better selection.*
- *[I would like to see a version of] Netflix with every single content available.*
- *I want my old movies.*
- *[In the future] there will be no need for PVR because we'll all be on demand and that's the point of PVR.*

- *Not multiple services….[and] I think if there was one service … everyone would gravitate there.*
- *[In] the old days you had to watch the show at this time and you had to be home for that and you would have talked about it at work the next day. Now it's like we have a choice and I think broadcasters are still trying to figure that out and it's like 'just give us choice'.*
- *Competition is what makes you better and if they have competition of course they are going to improve their services.*

The focus groups ended with a short discussion about future technology in choosing and consuming content.

- *Digital screen, augmented reality.*
- *I want total recall where my wall is an active screen, …[and] you could just say I'm in the mood for a romcom and I want Sandra Bullock in it and boom boom boom. It's all there.*
- *You'll also be able to have ear-pieces just like multi-player gaming. You'll be able to play or watch the same things with your friends…. You don't have to be in the same location but you'll be able to on and off talk to each other to have that interaction.*

Chapter 5. Discussion and Analysis

At the start of this project, I set out to discover the main criteria or factors the audience employs in making the decision to watch professionally produced shows in a multi-screen environment with abundant media. Overall, there were more similarities than differences between the two age groups. Where there were not significant differences between them, I have combined the groups in my discussion.

Traditional media still plays an important role for participants despite the availability of ever increasing options. What I learned is that the decision making process is not linear and there are a number of criteria that should be considered when helping the audience find a show to watch. The following were mentioned and it was my sense that mood is the most important followed by these additional criteria (in order of importance): their location; time they have available; who they are with; what is most convenient; what do they have access to (screens and content); does it have value; and what is the appropriate quality for the device or method. In helping audiences discover new shows to watch, it is important to recognize the significance of word of mouth; synopsis; packaging and artwork; reviews and recognition; trailers; search engine recommendations; branding; and marketing. What is clear is that most people want fewer or no ads; they want value for their money; they want a simplified process to find and watch shows; and they want more individual customization.

The following findings of this research are consistent with previous research from North America (CMF, 2014; De Rosa & Burgess, 2014), Europe (Ash, 2014), and Australia (Screen Australia, 2012) that reported: the TV is still the top screen; the audience prefers methods and screens that give them more choice, control and are easier to use; it is challenging to find content; and recommendations play an important role. Like DeRosa and Burgess (2014), this research also found audiences are looking for curated selections and similar to the the CMF (2014), audiences want better tools to simplify the search process.

This chapter begins with an explanation that viewing is not always equivalent or comparable, then looks at challenges the audiences faces with finding shows. From there the discussion moves on to audience preferences, choice and platforms; preferred screens and methods; differences between the two age groups; how people discover shows to watch; and the importance of social experience with watching shows. Finally, this chapter ends with a look at limitations, recommendations for future research, implications for industry and the conclusion.

5.1 Viewing is not Always Equivalent

How people view shows varies, with some things being viewed on a TV, computer or smart phone. Some may pay more attention to it and have it playing in the foreground (more actively) and others may pay less attention and have it playing more in the background. The process as to how people end up watching shows can be different, and this does not imply that one is better than another. Viewing may be passive, for example the show was being broadcast when they turned on the TV or was already playing when they walked in the room. Shows may also be running as background as people perform other tasks like cooking, cleaning or working on their laptop. The reality is the way people use these mediums is not always directly comparable.

5.2 Challenges with Finding Shows to Watch

Like the CMF (2016), this research also found that one of the bigger challenges for the audience in this overcrowded-marketplace is "discoverability". In the current environment, despite there being more and a wider variety of content available, finding content of interest is still a challenge for both age groups. Unless they had it previously recorded or already knew where to find it, participants often found the search and navigation frustrating, time consuming and non-intuitive. One participant noted that often more time was spent searching than watching. In general, there is "too much choice", "too much noise" or other distractions, and there isn't navigation or a search engine that they are completely happy with. Applications and devices can improve the search process but it is often difficult. Some participants search on one screen and view on another. Overall they would like to see improved content curation, navigation, and search tools. Participants wanted to be able to find viewing options in fewer places and their content on their media of choice.

5.3 The Audience Wants Fewer or No Ads

Whatever the platform, most participants prefer not to have ads and many say they are willing to pay for content to avoid them. Many agreed they are willing to watch one or two ads (especially if they are relevant and of interest to them), just not several minutes of ads. Like the Canada Media Fund (2014) study, this research also found the audience is making a shift to on-demand so they can have ad-free viewing.

5.4 Audiences Want More Choice and Control

Similar to the CMF (2014), this research found the participants want more control over what and when they watch and indicated algorithms and recommendations could be improved to be better suited towards their individual tastes or moods. People are diverse and their interests are likely different from other audience members. They want access to vast catalogues that include previously produced shows; they do not want to pay for stuff they don't watch (including being forced into bundles and packages like the offerings from cable and satellite providers); and for those who speak languages other than English, they want access to shows in their first language.

5.5 Choice and Platforms

There is a blur between platforms and delivery methods as the audience can more easily access the internet on their smart TV and watch TV shows on their computer, smart phone or tablet. When choosing shows to watch most participants do not think about the delivery method or differentiate between cable and internet delivery unless it is difficult to use and/or does not work instantly. For example, it can be time consuming to search for a show by using the remote control to scroll through the alphabet to spell out the show's title.

5.6 TV is the Preferred Screen

There was not one preferred method that stood out as participants preferred different delivery methods for different reasons. However, it was clear that for the participants the TV is the preferred screen. Like the the CMF (2015) study, this research project also found people generally prefer watching the big screen TV for the size; sound and image quality; ease in watching with others; and having access to the comforts of their own home (including the sofa, food, drinks).

5.7 Methods People Like

Participants like the personal video recorder (PVR) as they can access shows they have recorded anytime and can skip through commercials. Like the PVR, participants like the ease of use and accessability of streaming but find the picture quality is often not as good due to limited bandwidth, throttling or intentionally slowing down the internet, and/or compression. Additionally, focus group participants indicated they like to see movies at a theatre for the following reasons: it can be a social event; for the sound and image quality; for the audience experience; and to relax and give themselves a break from other distractions.

Some participants watch live TV (and not just news and sports) for immediacy and the social aspect, including watching scripted drama live so that they interact in real time simultaneously via social media with their friends and the larger audience and show during the live broadcast. This is consistent with research by De Rosa & Burgess (2014) that revealed people liked sharing their viewing experiences with others in person and via social media.

5.8 Differences Between the Two Age Groups

Overall, there were more similarities than differences between the two groups. Some of the differences between the two focus groups include:

- The top three methods for viewing reported for 35 and Under were streaming followed by live TV and then personal video recorder (PVR) different from the Over 35 who reported live TV, streaming and PVR. This is similar to the CMF (2014) report with participants aged 25 to 44 where it revealed live TV as the main method followed by PVR, streaming, and free download/video-on-demand (VOD). Live TV was the top method with Over 35 group and the majority of both groups still subscribed to cable.
- More people in the 35 and Under group than in the Over 35 group indicated cost played a bigger role when it came to choosing what to watch. Cost was not a significant factor for most of the Over 35 group. Future research could examine this in more detail.
- The Over 35 group used tablets more for watching shows than the 35 and Under group while the 35 and Under group used mobile phones for watching shows more than Over 35 group. Further research could also be done to understand why there are differences with the screens and devices between the two age groups.

5.9 Discovering New Shows to Watch

When participants talked about the process of discovering new shows to watch, the following were identified as being important, consistent with research by the CMF (2014) and De Rosa & Burgess (2014):

- Word of mouth was identified as being one of the most important in discovering new shows.
- Expert reviews and recognition (for example, festival screenings and awards)
- Trailers

- Search engine recommendations (however, some participants in each age group were suspect of search engines targeting them with specific content)
- Brand recognition (including high-profile actors, directors, producers, studio, franchise)

In addition to these, this research revealed the following are also important:

- Synopsis (what is the premise and storyline)
- Marketing (including print and digital advertising)
    - Packaging and artwork (it has to appeal to them or grab their attention when they are browsing or surfing)

5.10 Decision Making Factors

Consistent with the CMF (2014) study, this research demonstrates that the decision-making process is not linear. The CMF study looked at criteria and factors specific to movies and TV series whereas with this research, the discussion was more general and not always specific to the delivery platform. In answer to the question, how does the audience decide what to watch, the answer depends on many factors. The following are some of the key criteria this research identified in the decision-making process are (these are not specific to one genre, platform or screen):

- Mood was identified as one of the key criteria – How are they feeling? What are they in the mood for? Do they want to laugh, relax, think, not think, or are they feeling down?

The following additional criteria are presented in what I sensed as the order of importance.

- Location – Where are they? Are they inside or outside of their home and what screens or shows do they have access to in that location (movie theatre, home entertainment system, kitchen, living room, TV room, bedroom, office, traveling in a car, airplane, in a hotel, or work place)? Are they traveling, at work, or commuting? What is available at each location? How much control do they want or have at the location or environment they are in?
  - Convenience - What is the easiest and most convenient viewing for that location?
  - Access - What screens are available? What shows do they have access to on the device? How aware are they of what is available?
- Time and focus - How much time do they have available? Are they looking for something to watch on a coffee break, as they cook a meal, work out, clean their home, or are they wanting to relax, sit back and just watch a show? Are they focused on watching the show or are they doing other activities at the same time? Is the show foreground or background?
- Who are they with? Are they by themselves or with other people?
- Value – is it worth paying for? Is it exclusive or premium content (for example, HBO's Game of Thrones)?
- Quality - What screen or method makes the most sense or is the most appropriate for the picture and sound?

5.11 Social Experience

Participants commented that one of the reasons they go to movie theatres is for the social experience. This is also one of the reasons some people choose to watch some shows by live TV.

For example, some want to watch and cheer together during a live sports match or interact live via social media with friends and other audience members during a serial broadcast. In talking about the future, one of the comments was about watching shows live with your friends and interacting with them virtually (as people can do with online gaming).

5.12 Limitations

The sample was limited to Edmonton, Alberta. Future research could build upon this study and take place in multiple provinces to see if there are regional differences in Canada. It would have been beneficial to have more diversity in the Over 35 group. For example, the more diverse 35 and Under group talked about the desire to access content in multiple languages.

Because the researcher was also the moderator, it would have been beneficial to separate the two roles so the researcher could focus on observing and taking notes. The researcher also personally knew many of the participants and may have brought some personal bias into the discussion.

The viewer-tracking sheet could have been modified to ask participants if viewing was planned and intentional or unplanned and non-intentional. The sheet could have had participants record time of day and location of their viewing to see if there was any correlation with screen choice, method or genre. A large scale survey of the population could have been distributed to obtain a larger sample which would allow a better understanding of the population as a whole.

5.13 Future research

There is a lot of work still to be done in this area. Further research that could be performed includes focusing more specifically on the process of how the audience finds or becomes aware of shows to watch. Just recently the Canada Media Fund, National Film Board of Canada, and Telefilm Canada have embarked on a joint research project to address the issue of discoverability (CMF, 2016). During their consultation process, the Canadian Radio-television and Telecommunications Commission (CRTC) noted that technology has had an impact on how audiences consume content as they can bypass broadcasters (CRTC as cited by CMF, 2016). This has created a new challenge referred to as “content discoverability” (CMF, 2016).

As noted in the literature review by Bischoff (2015), Green (2015), Napoli (2012), and Stelter (2012), new methods for tracking viewing need to be developed and more research needs to be done with tracking content consumption across all screens. More investigation could be done with process and criteria for each screen, platform and genre. Further exploration could be done to look at unintentional or unexpected viewing that may happen while channel surfing or walking into a room while someone else is watching a show.

Longitudinal research could look at how content consumption changes over time. New audience research could look at how many people view a particular show over a long period of time – everything from festival screenings, broadcasts, on-demand, and non-theatrical (in classrooms, schools, universities).

Industry could also look more deeply into the what hinders audience search; the impact of throttling; the long-term impacts on personal privacy from gathering data for show recommendations; and how other sources of data from devices like fitness and health-monitoring devices can help search engines recommend shows for audiences to watch. I think we can learn from the music industry and other sectors when it comes to streaming, curation and playlists, search and navigation to develop better recommendation and delivery systems. Finally, further research could look at tagging and meta data to look at how over-the-tops (OTTs) like Netflix tag compared to what words the audience would use to tag the same show.

5.14 Implications for Industry

Because of the increasing availability of content through different methods and platforms, how we measure audiences has to evolve and become more sophisticated. New research needs to be done that helps industry better understand audience behaviour on all screens. In this era of abundant media, audiences need help finding shows. Recommendation systems, search and navigation could be improved so that are easier to use and better suited to individual preferences and circumstances. But at the same time, as noted by Gilbert (2013), we have to be cautious of using data mining to create over-engineered formulaic content. Unexpected viewing experiences can be rewarding (Oremus, 2015) for both the audience and service provider.

If discovering new shows is in part the result of word of mouth and recommendations, then shows may need time to find their audiences. Engaging with audiences via social media along with a media and festival strategy may help garner necessary recommendations and reviews. Industry could also do more to help build brands, market shows, and at the same time realize the importance of smaller, niche audiences. As noted by participants, for shows to stand out, eye-catching artwork and packaging; trailers; and an enticing synopsis are also important.

As we move further into a broadband environment for delivering content, how does industry satisfy a voracious appetite for content along with a demand for more control; competitive pricing and value; and a desire for the best quality picture and sound for each screen? Do we have the bandwidth to get what we want or do we need a hybrid model of OTT and broadcast? How can we bringing the best of both delivery systems to a new model?

Most participants indicated that they were okay with ads but that they wanted less of them, just not 15 minutes per hour of content. Commercials may have higher value if there were fewer of them (for example one or two at a time as with some on-demand content) and if they were more relevant and of interest to the audience.

As individuals have diverse tastes and interests, there is also value in delivering diverse content to serve niche audiences, in multiple languages. Stakeholders including content creators, broadcasters, OTTs and netcasters, need to collaborate to better meet the individual needs of the audience. Meta data and tagging are more important than ever and industry may want to ask the audience to help tag shows. For example, using words like “escapist” to tag or describe a movie may better help the audience find something to watch than how a librarian may classify it. The reality is that great content doesn't always find an audience despite efforts by content creators to use social media, media and festival to raise awareness for their shows as they are still dependent upon industry stakeholders like broadcasters, OTTs, distributors, and other media to help raise the profile within the delivery system. We all need to continue to learn, change and adjust in this new paradigm and find better ways to satisfy the audience and help them find shows they want to watch.

5.15 Conclusion

At the beginning of this project I set out to discover the main criteria or factors the audience employs in making the decision to watch professionally produced shows in a multi-screen environment with abundant media. Multiple screens and technology have a significant impact on how the audience makes choices however, I was not surprised that traditional media still plays an important role for participants despite the availability of ever increasing options. I have a better understanding of what drives choice and what factors to consider when helping the audience find a show to watch: mood; location; time available; what they have access to; if they are with other people; convenience; are they willing to pay for it; and quality. I wish small independent content creators/storytellers like myself could have a greater impact on the audience with helping them choose shows. The research confirmed the importance of my relationships with stakeholders along with recommendations (word of mouth, reviews and search engines); story synopsis; packaging; artwork; promotional trailers; branding; and marketing.

This research represents a snapshot of views at this particular time, and as the industry and environment are constantly changing what was found today may likely be very different a year from now. We need to continue to do research in this area and better understand audience motivations, develop better methods to help them find shows to watch, and simplify the search and delivery process.

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Appendix A – Viewer-Tracking Sheet

Please track your viewing over a 7 day period and note the following: What did you watch, when did you watch it, what screen did you watch it on, did you watch it live, recorded, streamed, downloaded, on-demand, other (please specify), what kind of show was it (movie, drama, documentary, comedy, movie), if it was as a series how many episodes did you watch, and the total time you watched for each.

Show or series title	**Date**	**Screen**	**Method**	**Genre**	**# episodes (if applicable)**	**Total time**
Example: Blacklist	Oct 26	TV	Recorded (PVR)	drama	2	2 hrs

Appendix B – Informed Consent Form

_"How Do You Watch?": Focus Group for a final research project

Focus Group Facilitator and Researcher:
Ava Karvonen phone: 780-964-1899 email: akarvone@ualberta.ca

Supervisor:
Dr. Stanley Varnhagen, Phone: 780- 492-3641 email: **sjv1@ualberta.ca**

Purpose of the Study:

I am looking for your participation in a focus group that will explore "How Audiences Make Choice in a Multi-Screen Environment". The focus group will be part of my final research project required to complete my Master of Arts in Communication and Technology through the University of Alberta. In addition to being a graduate student, I am also a content creator and produce and direct digital media projects including documentaries, games, websites, webisodes, and interactive content.

Methodology:

As a component of my final research project, I am asking you to take part in a Focus Group and to complete a waiting room survey and viewer tracking sheet (the tracking sheet will be completed prior to the focus group). The focus group is designed to gather thoughts and opinions on how audiences choose to watch professionally produced linear content or shows. The researcher will lead the group through a series of questions. The researcher will be taking notes and recording the session (audio only). The survey will take about 5 minutes of your time and the entire focus group (including the survey) will require up to 120 minutes (2 hours) of your time.

Anonymity:

All information collected will be coded to protect your anonymity. Prior to releasing results, any potentially identifying information will be removed. Any exemplary comments used in reporting will not be associated with any specific individual. A digital recording of the focus group session will be made for the purposes of transcription. The transcriptions will be used for qualitative analysis of the focus groups. Data collected and resulting research will be used in my MA project and may be used in published journal articles and for professional presentation (teaching and/or conferences). No names will be used at any time in any publication.

Facilitator and Researcher, Ava Karvonen, will take precautions to ensure the anonymity of focus groups participants; however, you also have a responsibility to protect the anonymity and confidentiality of other individuals in the focus group. Please refrain from discussing and attributing comments made during this focus group to the individuals who made them.

However, despite the precautions in place, it is still possible that you could be identified. Therefore, recognize that anonymity cannot be guaranteed if you choose to participate in the focus group.

Voluntary Participation:

Participation in this evaluative activity is completely voluntary and you will have the opportunity to withdraw from the Focus Group at any time.

This Informed Consent Form has been developed for the purpose of obtaining consent from research participants. By signing this consent form you are indicating that you are willing to participate in the focus group and contribute to the research.

Withdrawal from Study

You are free to withdraw from any of the research activities at any time, with no adverse consequences. You will not be able to withdraw your data (i.e., audio-recorded comments) once the focus group has begun. You will have one week from the end of the focus group to withdraw the data from the survey and viewer-tracking sheet.

Benefits

There are no direct benefits to the participants for participating in this research.

Risks

There are no known risks from participation in this study.

If you have concerns about this study, you may contact the Research Ethics Office at 780-492-2615. This office has no direct involvement with this project.

Any Questions?

If you have any questions or concerns about this research, please contact:
Researcher, Ava Karvonen, **akarvone@ualberta,ca**, 780-964-1899 or
Supervisor: Dr. Stanley Varnhagen, sjv1@ualberta.ca , 780- 492-3641

Participant Informed Consent

I acknowledge that the research procedures have been adequately described, and that all questions have been answered to my satisfaction. In addition, I know that I may contact the investigators designated on this form if I have further questions either now or in the future. I have been assured that personal records relating to this study will be kept anonymous. I understand that I am free to withdraw from the study at any time and will not be asked to provide a reason. I am aware that the session will be audibly recorded.

- *I give my permission to use the data in the waiting room survey. (Please check if you agree*
- *I give my permission to use the data in the viewer tracking sheet. (Please check if you agree)*

Please sign below.

I consent to participate in a focus group.

________________________ _________________________________

(name – please print) signature

Appendix C - Survey

This survey is voluntary and there is no obligation to complete it. Also, if you don't want to answer a question, just move on to the next one. The data will remain anonymous. If you decide at the end of this session or in the next week that you don't want me to use this data and/or the viewer-tracking sheet data, just let me know and I will remove it. Place both the survey and the tracking sheet into the envelope provided. Please write your name on the outside of the envelope. I will collect the surveys at the end of the focus group. Just ask if you have any questions.

1. What screens do you have in your home on which you watch shows? Please check all that apply.
   - ☐ Flat screen or HD Television
   - ☐ Internet enabled or Smart TV
   - ☐ Smart phone
   - ☐ Personal computer
   - ☐ Tablet
   - ☐ Screen to use with projector
   - ☐ Other: ____________________
   - ☐ Other: ____________________

2. On what screen do you watch the most shows?

   ____

3. What devices do you have in your home? Please check all that apply.
   - ☐ Apple TV
   - ☐ Chromecast
   - ☐ Satellite dish
   - ☐ projector
   - ☐ Personal video recorder (PVR)
   - ☐ DVD/BluRay player
   - ☐ Game console
   - ☐ SlingBox
   - ☐ Roku
   - ☐ Other: ____________________

4. What services do you currently subscribe to? Please check all that apply:
   - ☐ satellite TV
   - ☐ Internet
   - ☐ Video streaming (please specify) ____________________ ________
   - ☐ cable TV
   - ☐ Other: ____________________
   - ☐ Other: ____________________

5. By what methods do you currently watch shows? (check all that apply):
   - ☐ live TV
   - ☐ streamed (via cable or Internet)
   - ☐ screened at the movie theatre
   - ☐ pay per view
   - ☐ subscription video on demand
   - ☐ DVD/Blu-ray
   - ☐ playback on my personal video recorder (PVR)
   - ☐ downloaded from the Internet
   - ☐ Other (please list): ____________________ ____________________

6. By what methods do you watch the most shows? List your top three:

   i. ____
   ii. ____
   iii. ____

7. Before choosing to watch shows how often have you:

(please respond to the list below)	**Not at all**	**Sometimes**	**Frequently**
Followed advice from friends, family or colleagues			
Seen an advertising promo/clip or trailer			
Seen on screen advertising (ie embedded in the content)			
Responded to search engine recommendations			
Read posts on social media sites			
Visited the show website			
Seen an interview with cast/crew or review on radio, TV or print			
Seen an interview with cast/crew or review online			
Browsed or "surfed" to find something to watch			
Other (please specify):			

8. After watching shows how often have you:

(please respond to the list below)	**Not at all**	**Sometimes**	**Frequently**
Talked about it with friends, family or colleagues			
Posted a comment on a social networking site			
Shared a link to more information about the show			
Shared a link to where it can be viewed or purchased			
Added a comment or review to a blog or online forum			
Other (please specify)			

9. Please respond to the following statements and select one response from the list below:

   I have the devices required to access shows online.

   ☐yes ☐no ☐not sure

   I feel comfortable using online technology to watch shows.

   ☐very comfortable ☐comfortable ☐somewhat ☐slightly ☐not at all comfortable

   What is your Gender? (please select one)

   ☐ Male ☐ Female ☐ other ☐ prefer not to say

   Age: _______________

Thank you for completing this survey and for participating here today.

Appendix D – Focus Group Guide

Length: each focus group will be 2 hours
Number of Participants: Approximately 10 will be recruited for each group (aim for gender balance). There will be two groups (one group ages 18 to 35 and the other 36 to 55)
Moderator: Ava Karvonen
Location: TBA

Introduction and Agenda: 5 minutes

Welcome everyone. Thanks for joining me here today to assist me in my research. This focus group is part of my final research project required to complete my Master of Arts in Communication and Technology through the University of Alberta. I want to know more about "How Audiences Make Choice in a Multi-Screen Environment". By multi-screen I mean screen like movie theatre, TV, tablet, smartphone, and computer screens. Please hold onto your survey and viewer-tracking sheet for now. We will discuss it in a few minutes.

Review Agenda (agenda will be posted in the room)

- Distribute and complete waiting room survey
- Introductions/Purpose of Research
- Focus group business/How the Group Works/Consent Forms
- Focus Group Session
- Collect waiting room surveys and viewer-tracking sheet

Introductions/purpose of research – 5 minutes

- In addition to being a graduate student at the U of A, I am also a storyteller and content creator, focusing mainly on documentaries. I recently produced a documentary web series about rites of passage – first kiss, first time moving away from home, first job, first drink. I want to better understand how the audience chooses shows.
- The purpose of the focus group is to identify the main criteria or factors the audience employs in making the decision to watch professionally produced shows in a multi-screen environment. By "shows" I mean professionally produced programs like movies, documentaries, dramatic series, lifestyle series – not shows produced by amateurs, not games or interactive content. By "multi-screen" I mean tablets, TVs, movie theatre screens, and smart phone screens. Do you have any questions so far?

- My overall research question is: How does the audience make the decision to watch shows or programs?
- I am curious to find out about the impact multi-screens have on us. I want to know, “How do you make the choice now and do multiple screens or technology change anything”?
- Findings from my eventual study hopefully will assist content creators like myself better understand how their audiences make decisions, better reach audiences, and in doing so help maintain our cultural identity in a multi-screen environment.
- Once we begin the focus group we will do group introductions.

Focus Group Business – 5 minutes

- Start and end times (2 hours total)
- Breaks, bathrooms, turn off cell phones (or put on vibrate)
- Everyone gets to speak. There are no right or wrong answers. This is about your experiences, opinions and perspectives. You do not need to all agree. You will likely each have different viewing tastes. Your unique responses are of interest to my research. Please avoid making judgmental comments – (for example, about what each other chooses to watch)
- To make it easier for me, can you please speak one at a time?

Consent forms, Data and Viewer-tracking sheet

- Review consent form with participants.
- To emphasize, in my final research paper you will have anonymity. However, I can’t guarantee your anonymity as I can’t control the behavior of the group members once you leave here.
    - Keeping anonymity and confidentiality is a shared group responsibility. We should keep personal identity of participants confidential and what is said.
    - You can leave at any time but I can’t offer ability to withdraw focus group data as in my transcription of the audio, I won’t always know who is talking.
- Please write your name on the outside of the envelope provided. Place the survey and your viewer-tracking sheet in the envelope. Keep it with you and with your consent, I will collect the envelopes at the end of the focus group. You will also have one week from today to withdraw this data. If you decide at the end of this session or in the next week that you don’t want me to use this data and/or the viewer-tracking sheet data, just let me know and I will remove it. Do you have any questions?
- Release/consent forms also include permission to record session. I will be recording audio from the session today. I want to insure I focus on listening to you and not worry about taking accurate notes.

- Participation is completely voluntary, and only sign the consent form if you are completely comfortable with what is being asked of you.
    - There is no penalty for not participating.
- Any questions? Collect signed consent forms.

<u>Focus Group Session</u>
Turn on recording device.
Note to facilitator – remember to explore stories as they emerge.

The first part of this focus group will explore Methods and preferences

- Group introductions.
- In the waiting room survey, several methods of watching shows were listed – live TV, PVR, movie theatre screening, streamed, subscription, pay-per-view, downloaded. What methods do you think may be the most common and why?
- What kinds of shows do you think people prefer to watch on their (Tablet, smart phone, TV, computer, movie theatre screen) and why?
- What kinds of shows do people watch shows during their scheduled broadcast - ie. Live TV (as opposed to the PVR, Netflix, on demand)? Why do you think people watch live TV or scheduled broadcasts?
- Do people think about the delivery method? If so, how? Do you think people differentiate between TV and the Internet?
- How common do you think binge viewing is? What impact (if any) does that have on choosing what to watch?

Viewing Behaviour and Criteria

- How do you find shows to watch? How or where do you begin?
    - Follow-up question - What do people choose first? Shows/Content or screen – what is most important? Does screen play a role in choice? Do people choose differently on each screen? What impacts choice?
    - When people are browsing or surfing, how do they make a choice or what influences their choice?
- Is it easier to choose shows on some screens more than others? In what way? Why?
- How do people find out about or become aware of shows?
- What search or navigations systems seem to work best and why? Which ones don't work – and why?
- What criteria do people use to determine what to watch? Probe.
- Do you think you know or can find all your options?
- Do you think audiences have access to all content? Who controls access to content? What does this mean for audiences?

Final questions

- What does an ideal future look like when it comes to searching for, finding and watching shows? What would you like to see?

- Ask participants if they have any questions or comments (anything they would like to add that we have not discussed)
- Thank them for participating.
- End of discussion
- Turn off recorder at end of session. Check recording.

Appendix E – Survey Summary

35 and Under Survey Results and Summary

Ten participants

Age range was 22 to 35 years

What screens do you have in your home on which you watch shows:

- *10/10 - Flat screen*
- *9/10 - Personal computer*
- *7/10 - Smart phone*
- *5/10 - Smart TV*
- *3/10 - Tablet*
- *1/10 - Projector*

What screen do you watch the most?

- *5/10 - TV*
- *3/10 - Smart TV*
- *1/10 - iPhone*
- *1/10 - Computer*

What devices do you have in your home?

- *8/10 - DVD player*
- *6/10 - Game console*
- *5/10 - PVR*
- *4/10 - Chromecast*
- *2/10 - Apple TV*
- *1/10 - Satellite*
- *1/10 - VCR*

What services do you subscribe to:

- *9/10 - Internet*
- *8/10 - Video Streaming – 5 Netflix, 1 Shomi, 2 non-specified*
- *8/10 - Cable TV*
- *1/10 - Satellite*

By what methods do you currently watch shows?

- *9/10 - Streamed (via cable or internet)*
- *8/10 - Live TV*
- *7/10 - DVD/Blu-Ray Player*
- *6/10 - Movie theatre*
- *5/10 - Downloaded from the internet*
- *4/10 - PVR*
- *2/10 - PPV (pay per view)*
- *1/10 - VHS tapes*

By what methods do you watch the most shows? List your top three:

			Number of respondents
Method	Method 1	Method 2	Method 3
Live TV	1	5	
Streamed	7	3	2
DVD			2
PVR	2		2
Smart phone			1
Movie theatre			2
VHS			1
downloaded		2	

Before choosing to watch shows how often have you:

			Number of Respondents
(please respond to the list below)	**Not at all**	**Sometimes**	**Frequently**
Followed advice from friends, family or colleagues	2	3	4
Seen an advertising promo/clip or trailer		7	1
Seen on screen advertising (ie embedded in the content)	5	3	3
Responded to search engine recommendations	6	3	1
Read posts on social media sites	4	4	2
Visited the show website	8	1	1
Seen an interview with cast/crew or review on radio, TV or print	3	5	2
Seen an interview with cast/crew or review online	3	6	1
Browsed or "surfed" to find something to watch	3	4	3
Other (please specify): nothing was specified	1	1	

After watching shows how often have you:

			Number of Respondents
(please respond to the list below)	**Not at all**	**Sometimes**	**Frequently**
Talked about it with friends, family or colleagues		3	6
Posted a comment on a social networking site	2	4	2
Shared a link to more information about the show	4	2	2
Shared a link to where it can be viewed or purchased	6	1	1
Added a comment or review to a blog or online forum	5	3	1
Other (please specify): nothing was specified	1		

When asked if they have the devices required to access shows online – 100% replied yes

When asked how comfortable they are with using online technology to watch shows – 9/10 replied very comfortable,1/10 comfortable

Over 35 Survey Results and Summary

Nine participants

Age range was early 40's to late 50's (some chose not to give exact age and gave an age range)

What screens do you have in your home on which you watch shows:

- *8/9 - Flat screen*
- *8/9 - personal computer*
- *7/9 - Smart TV*
- *6/9 - smart phone*
- *4/9 - Tablet*
- *2/9 – Tube TV*
- *2/9 – projector*

Screens they watch the most?

- *6/9 – TV*
- *2/9 - Tube TV*
- *1/9 - Ipad*

What devices do you have in your home?

- *8/9 – DVD player*
- *5/9 – PVR*
- *2/9 - Apple TV*
- *2/9 - projector*
- *2/9 - game console*

What services do you subscribe to:

- *9/9 - Internet*
- *7/9 - Cable TV*
- *6/9 - Video Streaming – 4 Netflix (majority), 1Crave, 1 Shaw on Demand*

By what methods do you currently watch shows?

- *8/9 - Streamed (via cable or internet)*
- *7/9 - DVD/BluRay Player*
- *7/9 - Live TV*
- *6/9 - Screened at Movie Theatre*
- *5/9 - Subscription VOD*
- *4/9 - PPV*
- *4/9 - Downloaded from Internet*

- *4/9 - Playback on PVR*

By what methods do you watch the most shows? List your top three:

			Number of respondents
Method	Method 1	Method 2	Method 3
Live TV	5	1	1
Streamed	3	3	
DVD	1		1
PVR	2		1
PPV/VOD		2	1
Smart phone			1
Movie theatre			1

Before choosing to watch shows how often have you:

			Number of respondents
(please respond to the list below)	**Not at all**	**Sometimes**	**Frequently**
Followed advice from friends, family or colleagues		7	1
Seen an advertising promo/clip or trailer		5	3
Seen on screen advertising (ie embedded in the content)	5	2	2
Responded to search engine recommendations	5	2	2
Read posts on social media sites	1	6	2
Visited the show website	3	4	1
Seen an interview with cast/crew or review on radio, TV or print	2	6	
Seen an interview with cast/crew or review online	1	5	2
Browsed or "surfed" to find something to watch	1	2	5
Other (please specify): by subject, recommended by my habits youtube (google),video store			2

After watching shows how often have you:

			Number of respondents
(please respond to the list below)	**Not at all**	**Sometimes**	**Frequently**
Talked about it with friends, family or colleagues		2	6
Posted a comment on a social networking site	3	2	3
Shared a link to more information about the show	3	4	1
Shared a link to where it can be viewed or purchased	1	7	
Added a comment or review to a blog or online forum	6	2	
Other (please specify): posted trailer			1

When asked if they have the devices required to access shows online – 100% replied yes

When asked how comfortable they are with using online technology to watch shows – 7/9 replied very comfortable,1/9 comfortable and 1/9 slightly comfortable

Appendix F – Viewer-Tracking Sheet Summary

Participants were asked to track their viewing habits over seven days prior to the focus group from the homework/viewer-tracking sheet. Completed by 8/10 participants.

Results from the 35 and Under age group:

Total time watched ranged from 5.5 to 35.5 hours for one week

Screen most used	Number of respondents
TV	3
Computer	1
iPad	1
iPhone	1

Method most used	Number of Respondents
Streamed	4
PVR	3
On demand	1

Results from the Over 35 age group:

Total time watched ranged from 6.25 to 36 hours for one week

Screen most used	Number of respondents
TV	8

Method most used	Number of Respondents
Live TV	4
Streamed	2
PVR	1
DVD	1

Appendix G - Transcripts

Available upon request from the researcher, Ava Karvonen

Please contact by email: ava@reelgirlsmedia.com