

ParticipACTION & Newfoundland and Labrador

Make Room for Play Campaign Evaluation

June 11, 2015

About the Research

Make Room for Play Campaign in Newfoundland & Labrador

- ParticipACTION engaged the Government of Newfoundland & Labrador in the development and implementation of ParticipACTION's social marketing campaign: Make Room for Play.
- The campaign aims to encourage parents to increase opportunities for their children's active play time by moderating the amount of their children's screen time.
- The campaign was developed as part of a larger three-year messaging focus on active play in response to the Active Healthy Kids Canada Report Card that identified children (aged 5-11 years) and youth (aged 12-17 years) were not meeting the Canadian physical activity guidelines—especially through the lack of outdoor play.
- ParticipACTION executed a NL-specific media purchase (co-branded between ParticipACTION and Newfoundland & Labrador) that was augmented by PSA and bonus airtime secured by ParticipACTION.

Four :30 second ParticipACTION television advertisements (Playground, Hockey, Skipping and Basketball) were evaluated for success.

Success was assessed in two key markets:

1. General Canadian Population

- 767 randomly –selected, representative sample of Canadian adults (18+)
- English ($n = 618$); French ($n = 149$)
- To reflect the overall Canadian population, this sample was weighted (using Census data) by age, gender, and region.

2. Moms with Children Aged 5-11 Years

- 809 Canadian mothers (English ($n = 656$); French ($n = 153$))
- This sample was weighted by region.
- Oversamples were obtained in Newfoundland & Labrador ($n = 45$) to better evaluate the market.

- Similar to previous phases of the research, participants were recruited from the online consumer panel, Angus Reid Forum, consisting of over 125 000 Canadians. External vendors were also used to meet oversample requirements.
- Recall and impact of the “Make Room for Play” advertisements that aired between January 12 and March 31st, 2015 were evaluated.
- From April 1st-13th, 2015 the study was conducted online using the “de-branded” advertising stimuli of the visual presentation.
- Tracking data from 2008-2014 is presented to show the changes in opinion and attitude, when available and appropriate.
- Note: 2015 marked the first year of a co-branded campaign in Newfoundland and Labrador and therefore tracking data prior to 2015 reflects national, and not Newfoundland and Labrador -specific, reporting.

MEDIA BUY & REACH

Make Room for Play

Campaign Date: January 12, 2015 – March 31, 2015

- TV
- Cinema
- Digital



ParticipACTION 2014/2015 Campaign Launch Newfoundland - Blocking Chart

			2015												
			January				February				March				
Date: November 27, 2014	Tactics	#	29	5	12	19	26	2	9	16	23	2	9	16	23
Revision:															
Media															
Television - St. John's	:30 Second	1300			200	150	150	100	100	100	100	100	100	100	100
Cinema 3 locations/7 screens	:30 Second Showtime :10 Second pre-show														
Digital - Video	:30 Second														
SEM - National	Text ads														

Make Room For Play Television Plan Overview

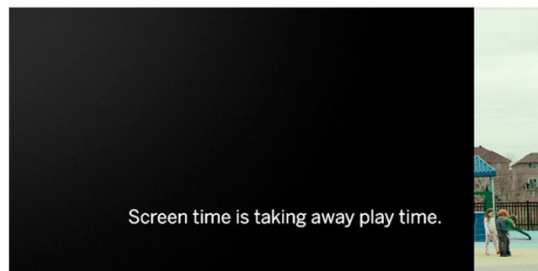
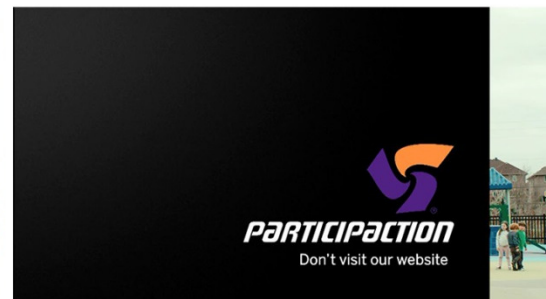
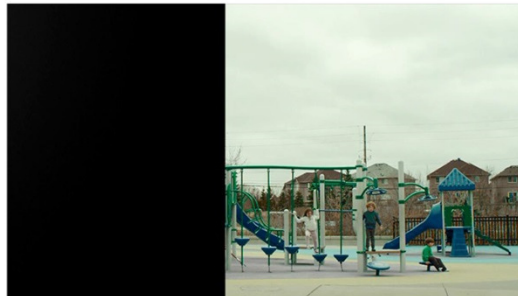
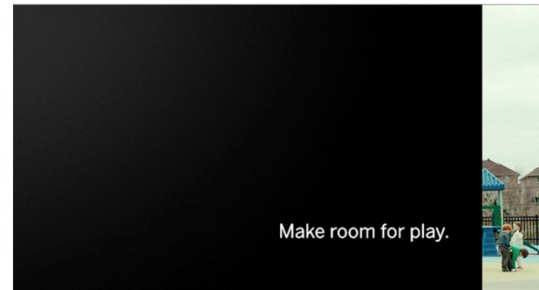
- The 2014/2015 ParticipACTION Make Room For Play television campaign was successfully negotiated with all planned markets exceeding planned GRPs and achieving the prime objective.
- Many targeted programs were purchased to reach the target of W25-54 (with children 5-11) in English Canada, including top prime time shows such as: Hawaii Five-0, Elementary, The Flash, Chicago Fire, Chicago PD, State of Affairs, NCIS: Global, NCIS: NO.
Fringe programs include: Days of Our Lives, The Talk, Rachael Ray, Dr. Oz, Ellen, The Social, The Price is Right, Dragon's Den.
- Several Specials and Awards shows were also negotiated as the reach, live viewing percentage and social engagement scores perform well for the target. Eg. Superbowl, Academy Awards and the Grammys.
- Additionally, no charge PSAs were negotiated on all stations to air during the course of the campaign.

Planned Television Buy

Markets	Planned GRPs	Estimated GRPs	Index %	Prime %	Reach %	Frequency
St. John's	1,300	2,263	174%	70%	80%	17.7

- All planned markets have over-achieved the GRP objective due to strong negotiations and additional no charge PSAs.
- Reach and Frequency is based on paid spots.

The four Make Room for Play television spots included an end-frame co-branded by ParticipACTION and Newfoundland and Labrador.



Tactics

- Use of both social and native placement of video content (spots)
- Prioritize parents' digital devices kids are likely using;
 - Smartphones
 - Tablets
- Dial up early evenings & weekends when kids likely to be in front of screens with their parents
- Capitalize on real-time audience signals for timely relevance
- Monitor and optimize tactic weighting based on engagement metrics
- Projected digital impressions: 4,515,953
- Projected clicks: 49,018

Digital Analytics



Results (January 12 to March 31, 2015)

- Make Room for Play tool downloads:
 - Total - 10,292
 - Newfoundland & Labrador - 305
- Website visits (Make Room for Play landing page):
 - National – 8,322
 - Newfoundland & Labrador - 17,502
- Total website visits = 266,708 (17% increase over same time period in 2014)*
- 356% increased traffic to our YouTube page (over same time period in 2014)
- 12% increased traffic to our Facebook page (over same time period in 2014)

*Note: the Bring Back Play national campaign was in market at the same time period in 2014

Executive Summary

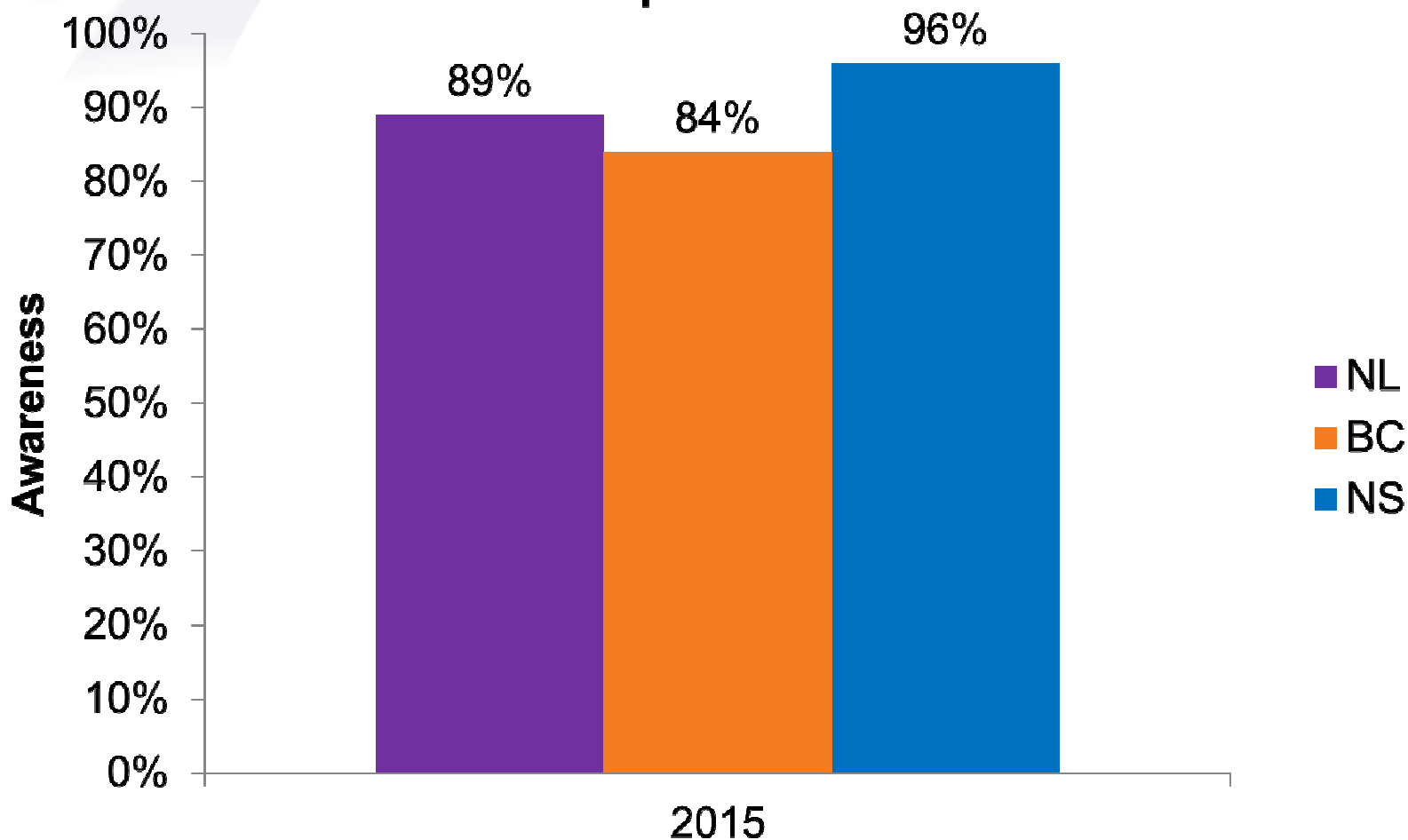
- ParticipACTION is still amongst the most recognizable physical activity brands in the nation; and with aided awareness is on par with the YMCA, Tim Horton's, Canadian Tire, and Heart & Stroke.
- Unaided, ParticipACTION is the number one physical activity promotion organization among moms with children ages 5-11 years, and is on par with the YMCA amongst the general population. Similar results are seen when assessing organizations that promote physical activity for children.
- The 2015 campaign made an impact overall and within its' target markets. However, due to cut-backs in several media markets due to federal funding cuts, across Canada aided ad and slogan recall significantly decreased, while campaign markets (i.e., Nova Scotia, BC, and Newfoundland and Labrador) were higher, on par with national recall figures from pervious years.

- The Make Room for Play campaign has a stronger impact in Newfoundland presence vs. nationally as 38% of Newfoundland moms of kids 5 – 11 claimed to recall the advertising vs. 24% of moms in Canada.
- The campaign message resonates with moms nationally and in Newfoundland and Labrador as correct message recall is very high (80% in Newfoundland). For moms, “less screen time, more play time, limit screen time” is the most recalled message.
- The campaign is motivating and evokes feelings of concern among Moms in Newfoundland and Labrador as more than three quarters of moms in Newfoundland and Labrador report doing something as a result of seeing the ad including creating opportunities for their children to engage in active play more often and making an effort to engage their children in active play more often.

- 90% of Canadians and moms agreed the screen time takes away from active play opportunities and that children's screen time should be reduced.
- This campaign was viewed as unique compared to the Bring Back Play campaign of the previous two years.
- Canadians and moms were more interested in ParticipACTION following the new campaign. Additionally, moms were more likely to reconsider their child's physical activity behaviours compared to last year.
- Moms estimate 3hrs/weekend day and 2hrs/week day of screen time for their children; 85% of which feel it is important to limit this time and only 1/3 actively track screen time.
- Homework completion is now placed ahead of family activities.

ParticipACTION Brand

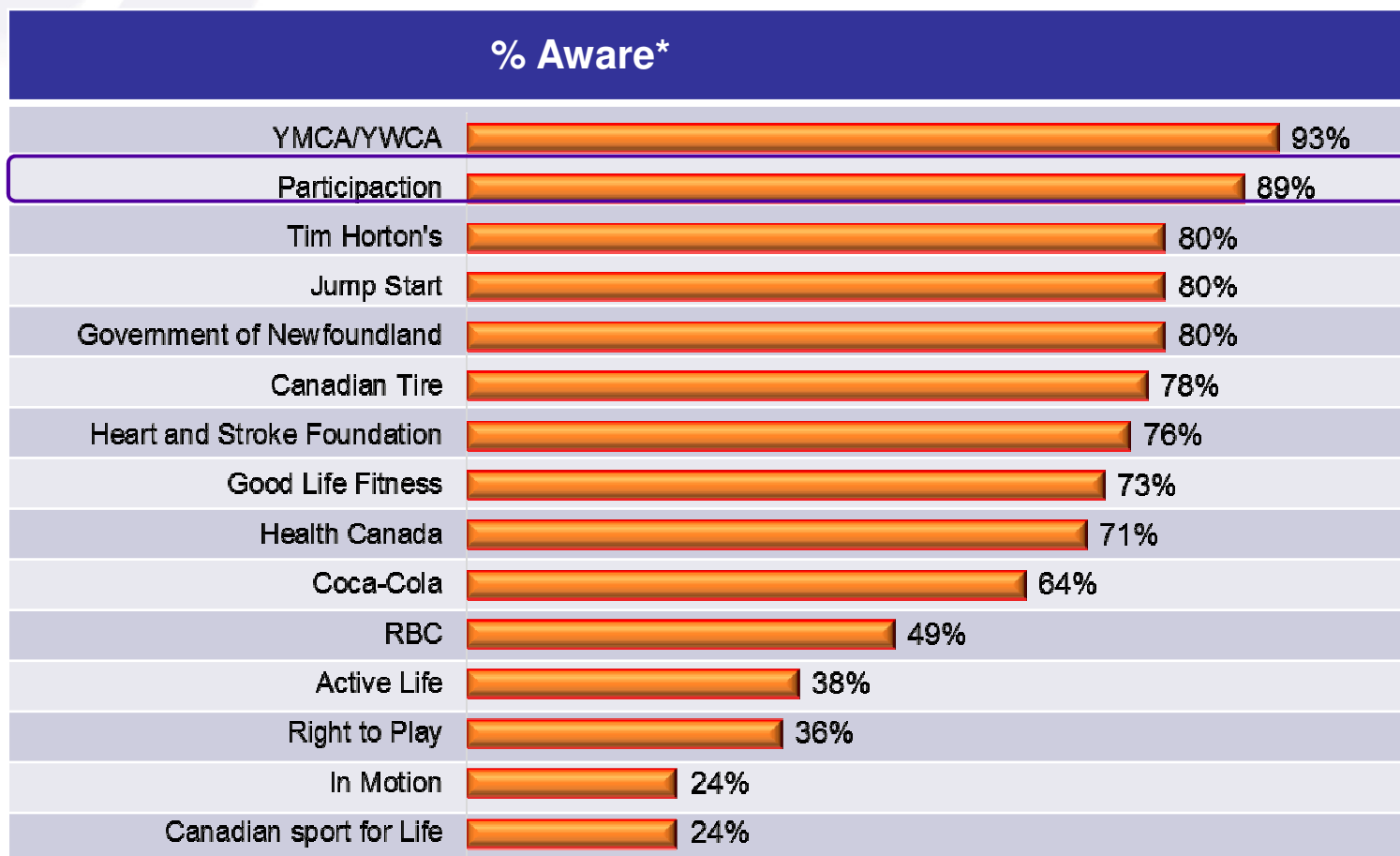
Moms of Children (5-11 years): Awareness of ParticipACTION



Base: All respondents; Gen Pop ($n = 767$); Moms 5-11 ($n = 809$)

Q.9. Please indicate which of the following organizations you are aware of, and how familiar you are with each.

Among Newfoundland and Labrador moms with children aged 5-11 years, aided awareness is more familiar than Tim Horton's.



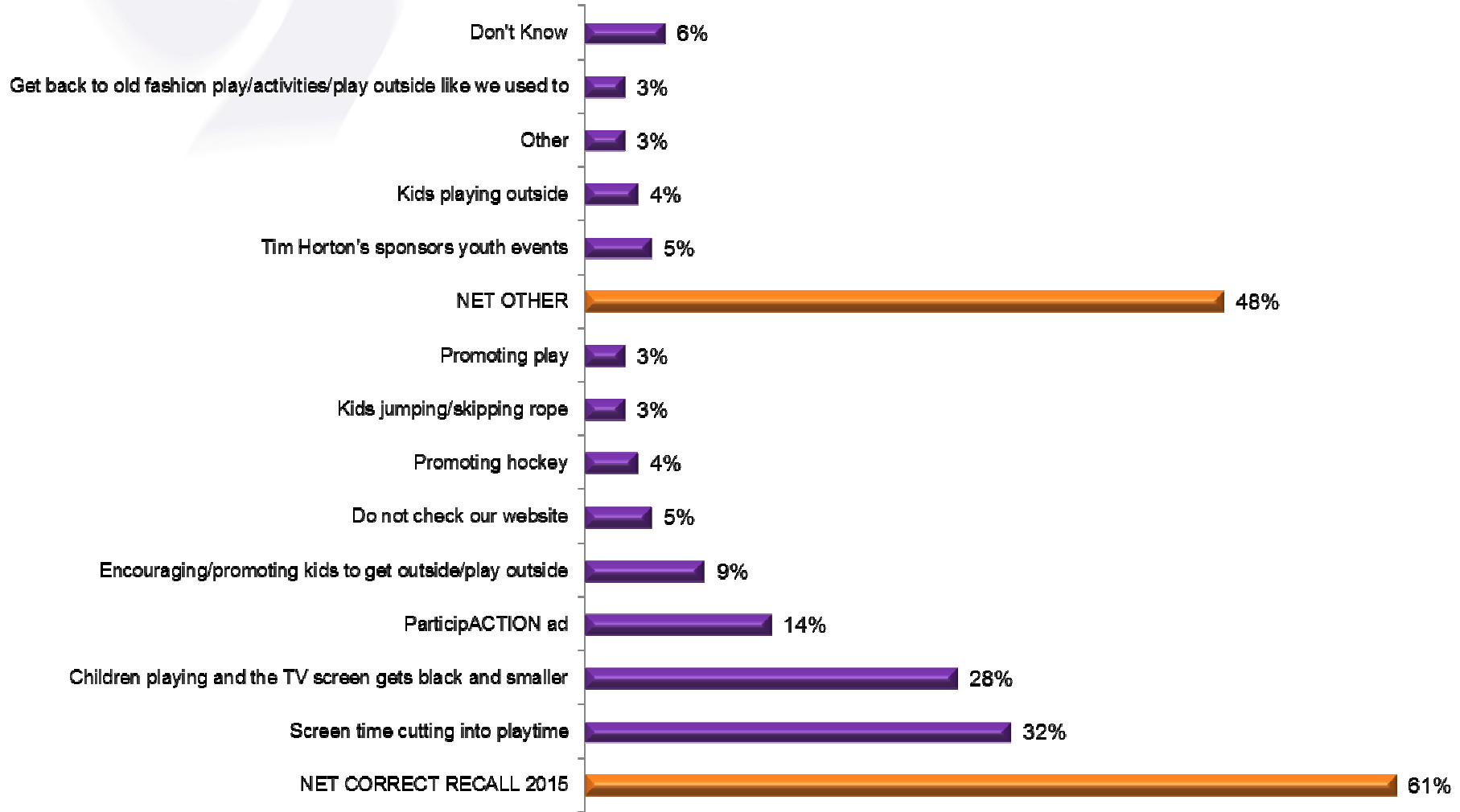
*CAUTION: Small base size

Base: NL Moms 5-11 2015 (n = 45)

Q.9. Please indicate which of the following organizations you are aware of, and how familiar you are with each.

Proven Recall of ParticipACTION Ads Total Mentions – Moms 5-11

Three in five moms can correctly recall key elements of the Make Room For Play ad.

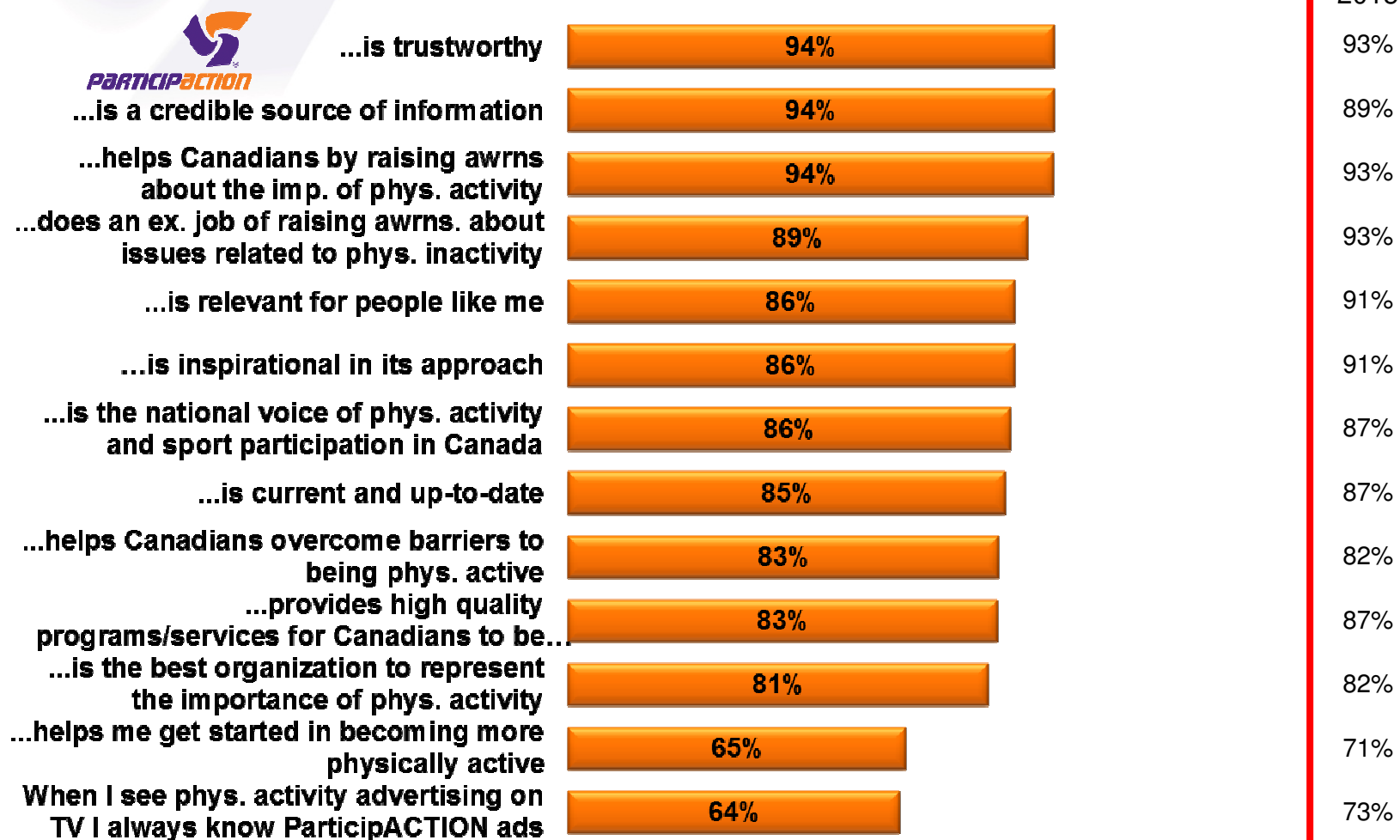


Base: Saw Recent Ads about Physical Activity with children; Moms 5-11 (n = 217)

Q.11. Please describe everything you can remember about the recent advertising that you saw. Please be as specific as possible.

Moms' Attitudes Towards ParticipACTION Brand

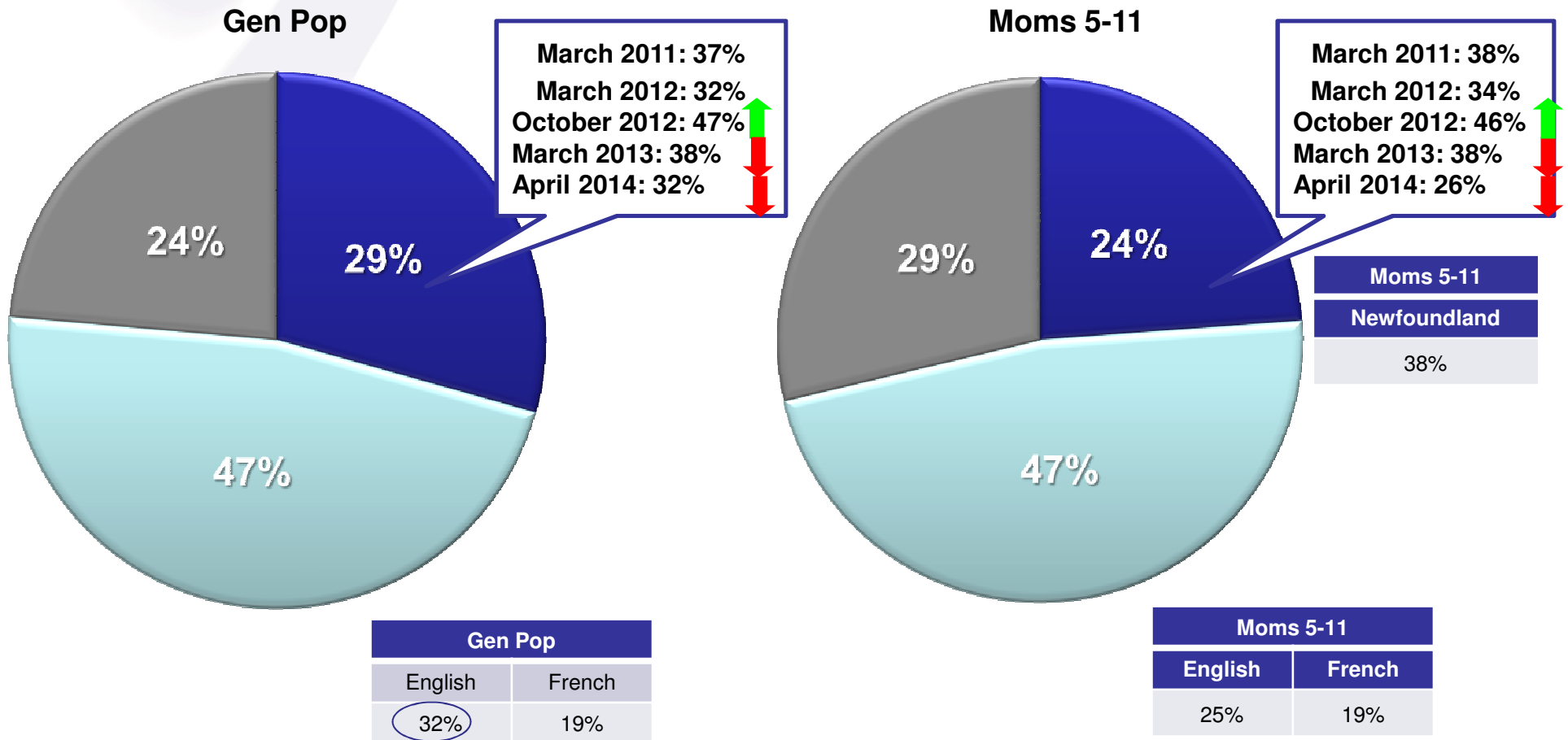
Nearly all moms trust ParticipACTION, find it a credible source of information and agree that it helps Canadians by raising awareness about the importance of physical activity. Nova Scotia moms amplify many attitudinal measures compared to NL moms.



Base: All respondents; Moms 5-11 (n = 809)
 Q.21 How much would you agree or disagree with the following statements about ParticipACTION?

Claimed Recall of Ads About Physical Activity

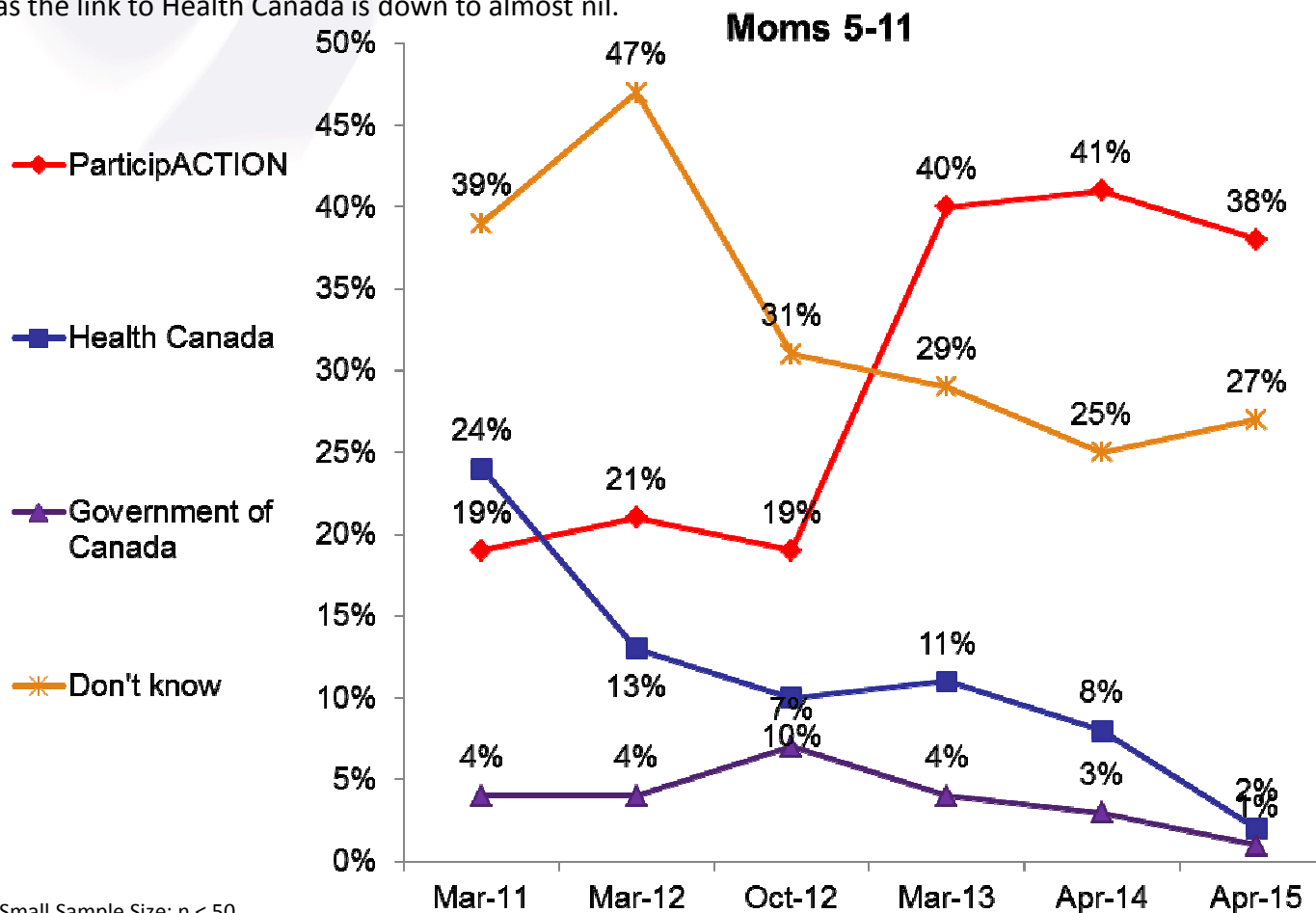
- 38% of Newfoundland moms of kids 5 – 11 claimed to recall the advertising vs. 24% of moms in Canada.



Base: All respondents; April 2014 Gen Pop (n = 767); Moms 5-11 (n = 809), April 2014 Gen Pop (n = 770); Moms 5-11 (n = 1046), March 2013 Gen Pop (n = 757); Moms 5-11 (n = 1142), Oct. 2012 Gen Pop (n = 660); Moms 5-11 (n = 1087)
 Q.10 Have you seen any recent advertising about physical activity?

Sponsor Link to Recent Advertising - Moms

In Newfoundland and Labrador, Mom's linking the ad recalled to ParticipACTION maintains similar levels as the past two years in English Canada whereas the link to Health Canada is down to almost nil.



Moms 5-11	
English	French*
41%	21%

Moms 5-11
Newfoundland
44%*

* Caution Small Sample Size: n < 50

Base: Saw Recent Ads about Physical Activity for children; April 2015 Moms 5-11 (n=217), April 2014 Moms 5-11 (n=223); March 2013 Moms 5-11 (n=277); October 2012 Moms 5-11 (n=696)

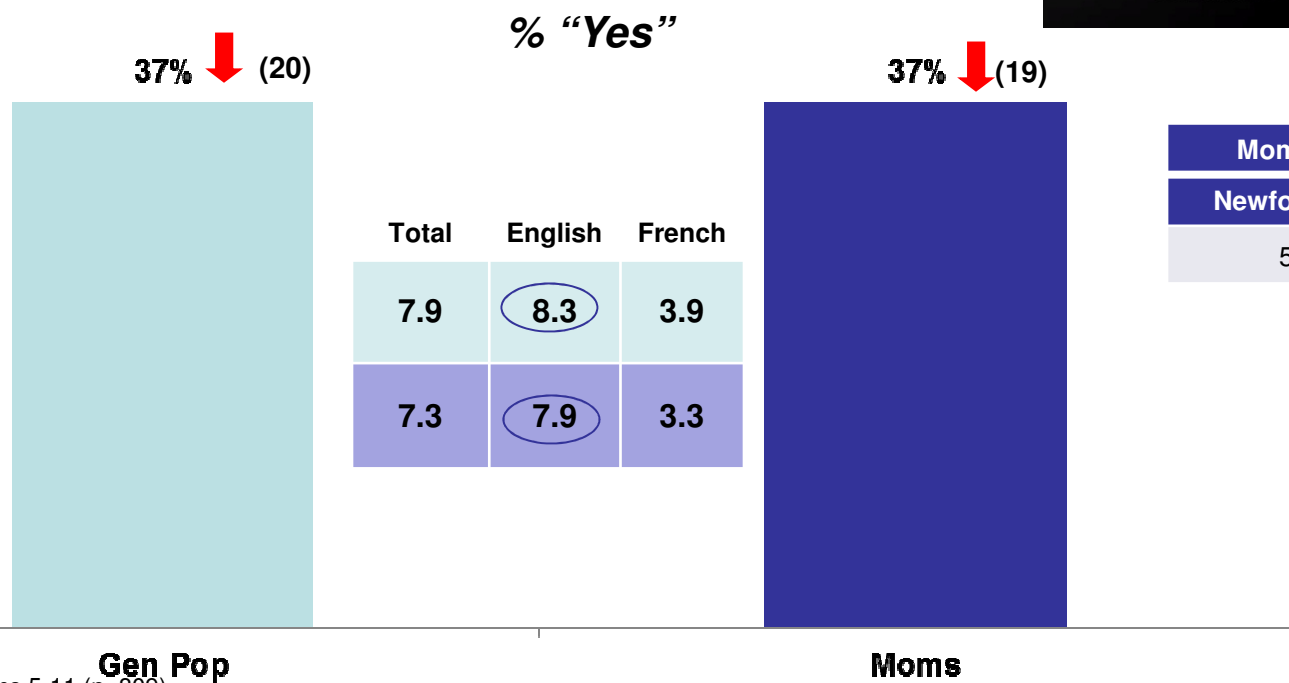
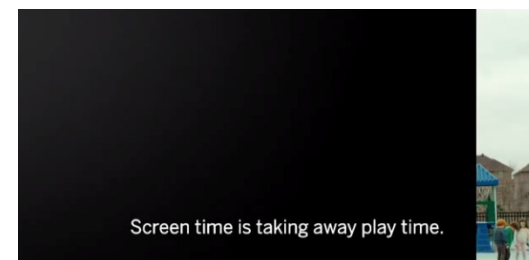
Q12. To the best of your knowledge what organization(s) sponsored this advertising?

NOTE: In past years, this question related to recall of ads about physical activity. In this wave, it related to "the specific amount of physical activity appropriate for children."

Roughly two fifths of moms and gen pop overall recall the Make Room for Play ad on a prompted basis, a significant decrease since last year's Bring Back Play ad. Recall is significantly higher among English-speaking Canadians. Over half of moms in Newfoundland recall the ads on a prompted basis, higher than in the rest of Canada.

Gen Pop	
English	French
42%	18%

Moms 5-11	
English	French
41%	24%



Base: Gen Pop (n=767), Moms 5-11 (n=809)

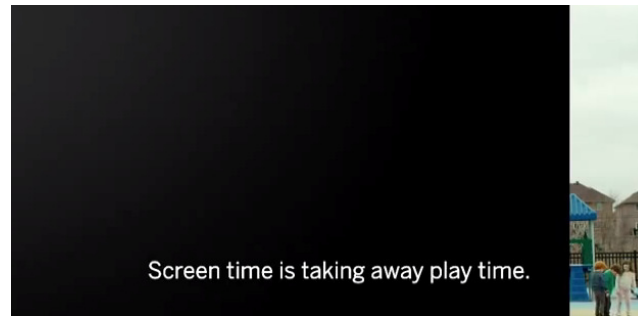
Q.15 Have you seen this ad on television in the past two months?

Base: Respondents who saw ad on TV; Gen Pop (n=289), Moms 5-11 (n=336)

Q.15a Approximately how many times have you seen this ad on television in the past two months?

Prompted Sponsor Link

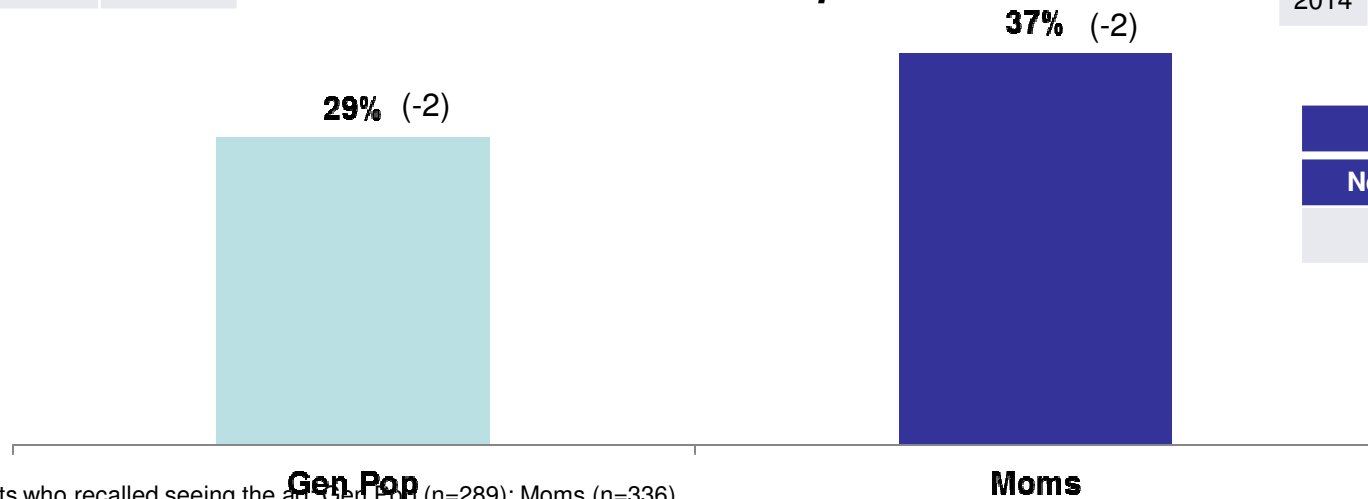
Similar to last year, more than a third of moms with kids aged 5-11 are able to correctly link the unbranded ad to ParticipACTION. Sponsor link among English-speaking moms. Gen pop linkage of ParticipACTION has also remained roughly the same since 2014. Among Newfoundland moms however, the sponsor link is higher at approximately half the target group correctly identifying ParticipACTION as the sponsoring organization.



	Gen Pop	
	English	French*
2015	30%	21%
	-1	-13
2014	31%	34%

	Moms 5-11	
	English	French*
2015	39%	20%
	-2	-11
2014	41%	31%

% Mentions for ParticipACTION



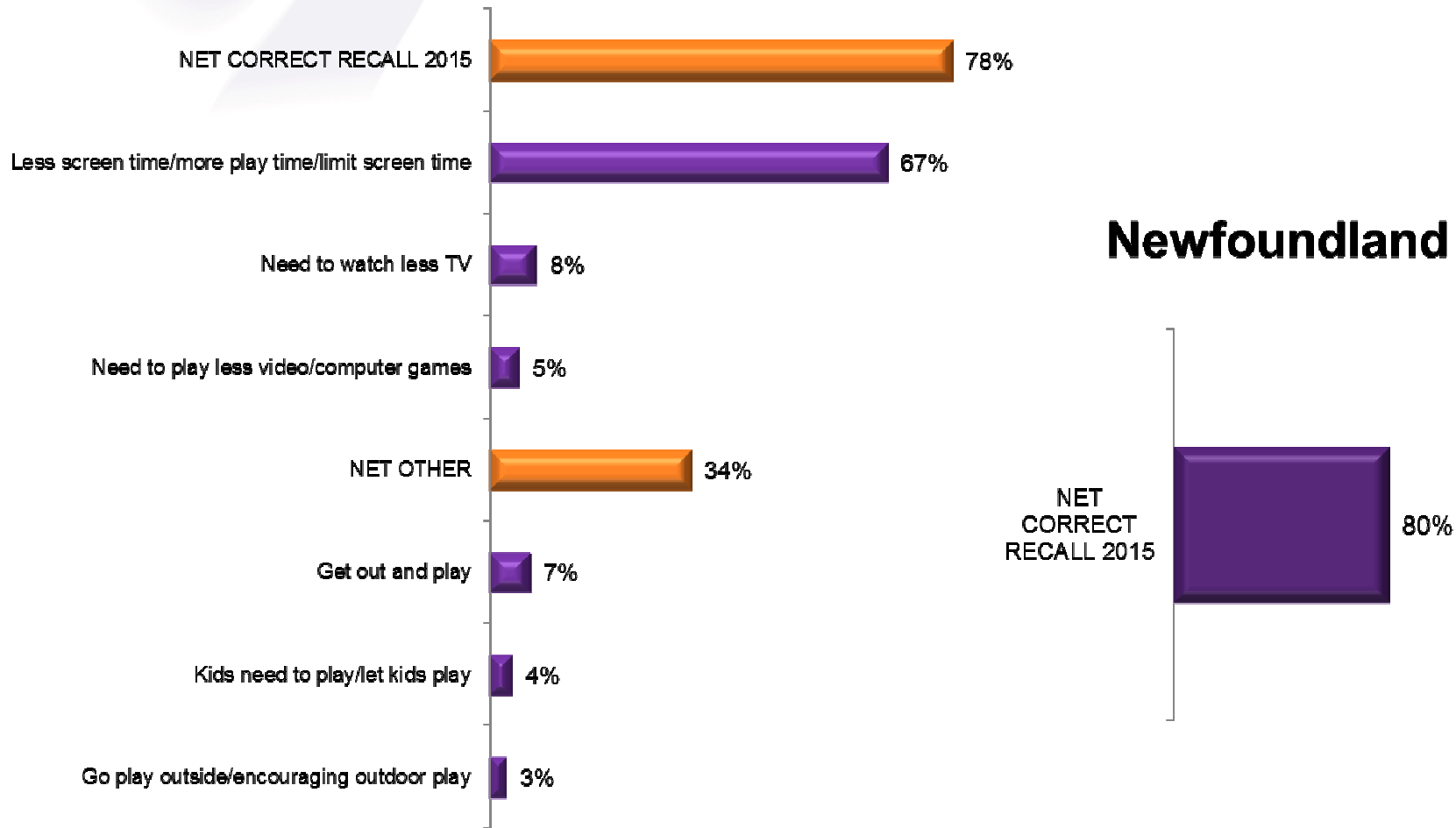
Base: Respondents who recalled seeing the ad, Gen Pop (n=289); Moms (n=336)

* Small sample size

Q.16 To the best of your knowledge what organization(s) sponsored this advertising?

Prompted Message Recall – Moms 5-11

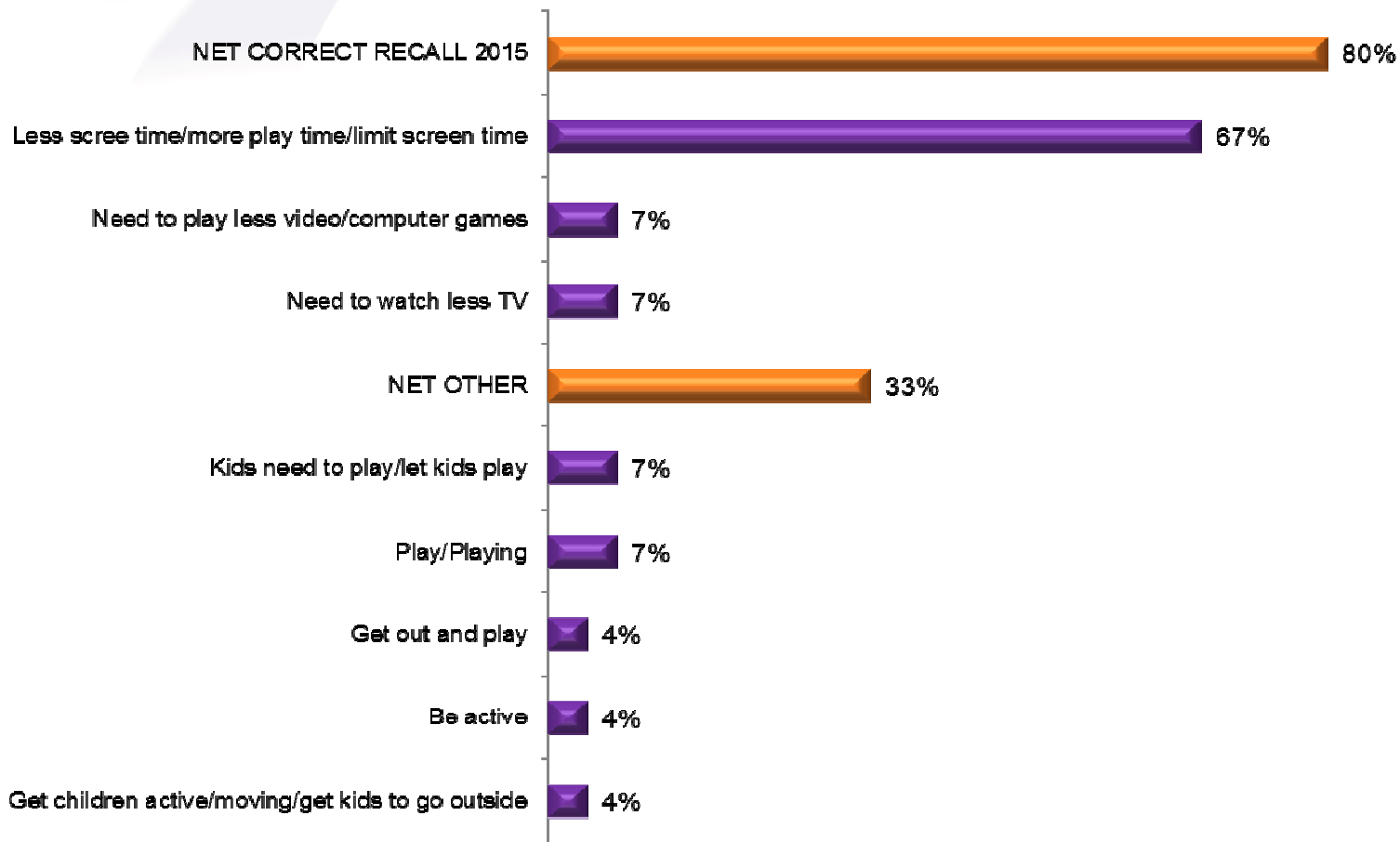
For moms, “Less screen time/more play time/limit screen time” was the most recalled message, significantly higher than the recall among the general Canadian population. Newfoundland and Labrador results are on par with national moms 5 – 11.



Base: All respondents; Moms 5-11 (n = 809) *Small Sample
Q.16a. What was the main message of the ads you were just shown? Please be as specific as possible.

Prompted Message Recall – NL Moms 5-11

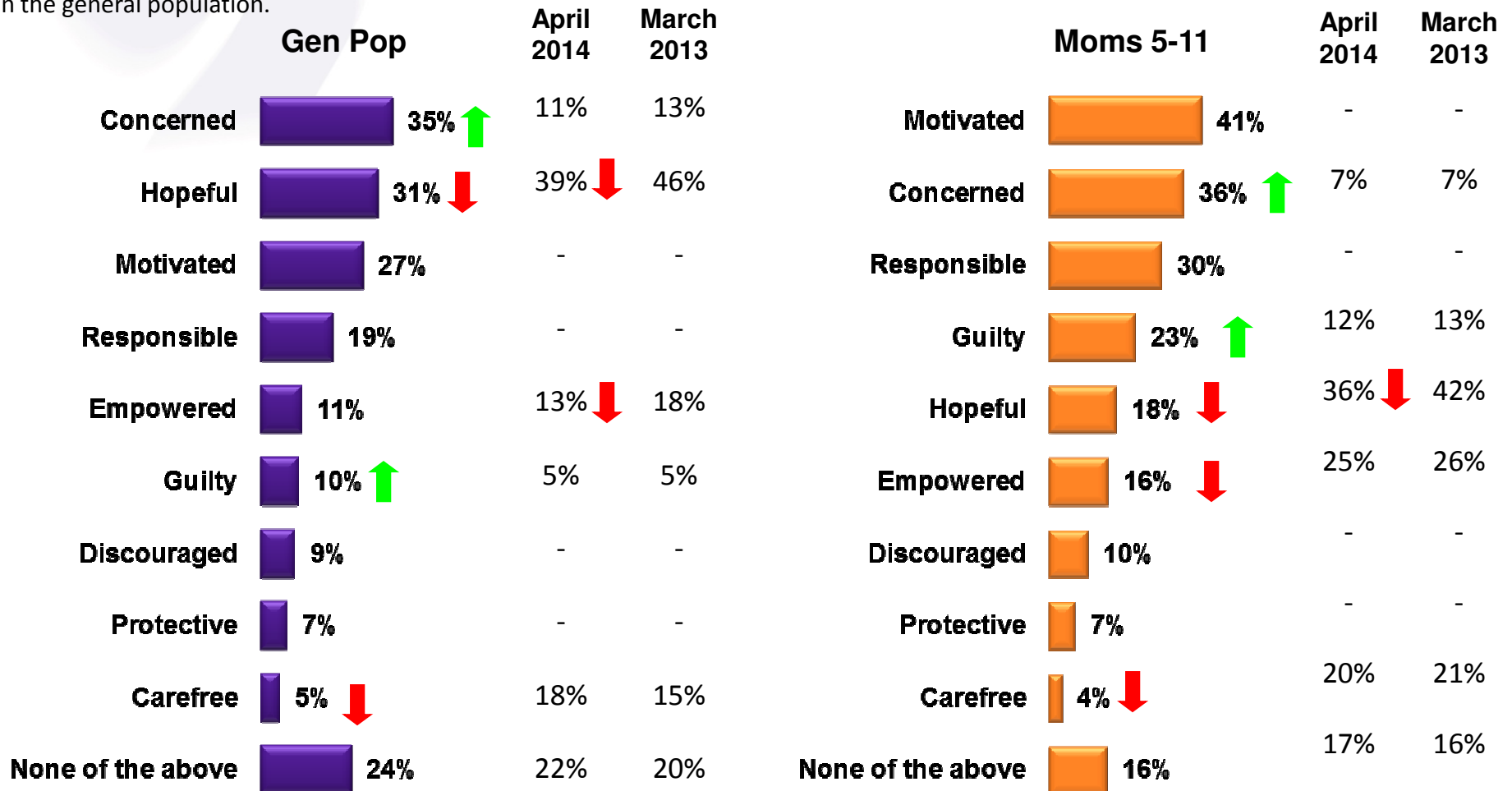
The large majority of moms were able to correctly identify the main message of the campaign. Other responses were still in line with goals from ParticipACTION but not directly related to the messages in this campaign.



Base: All respondents; NL Moms 5-11 (n = 45)* Caution: small base size
Q.16a. What was the main message of the ads you were just shown? Please be as specific as possible.

Sentiment Felt when Viewing the Ad

Compared to the “Bring Back Play” campaign, the 2015 ad is far more likely to evoke feelings of concern. Moms feel significantly more motivated than the general population.



Agreement with Ad Appeal Statements - Moms

Nine in ten moms agree that the information presented in the ad was credible, that unstructured activities are effective and made them feel that screen time takes away from active play. They also are more likely to find this ad to be unique than last year's ad (+10).

Moms 5-11 Top 2 Box (% Agree)		April 2014	March 2013	March 2012	March 2011
The information presented in this ad is credible	91%	93%	93% ↑	88%	86%
Ad made you feel unstruct. activities are effective for kids	91%	94%	95%	-	-
Ad made you consider screen time takes away opps. for...	91%	-	-	-	-
This ad was unique and different	87%	77%	78% ↓	83% ↑	77%
Ad made you feel children should decrease their screen time	86%	-	-	-	-
Ad made you feel like you should encourage child to be...	84%	83%	86%	84%	82%
This ad was enjoyable to watch	82%	93%	94% ↑	81% ↑	70%
What the ad said and showed was relevant to you	79%	-	-	-	-
Ad made you reconsider how much phys. act. child is getting	77%	73% ↓	77% ↓	82%	-
Ad made you reconsider how much screen time child is...	72%	-	-	-	-
Ad gave you a good feeling about the sponsoring...	63%	72% ↑	67% ↑	55%	55%
Ad increased your interest in the sponsoring organization(s)	45%	42%	41% ↑	36%	36%
This ad does not apply to your child/children	38%	-	-	-	-
You learned something new from this ad	38%	41%	42% ↓	65%	65%

Base: All respondents; Moms 5-11 (n=809)

Q.17 Thinking of the ads you were just shown, how much do you agree or disagree with the following statements?

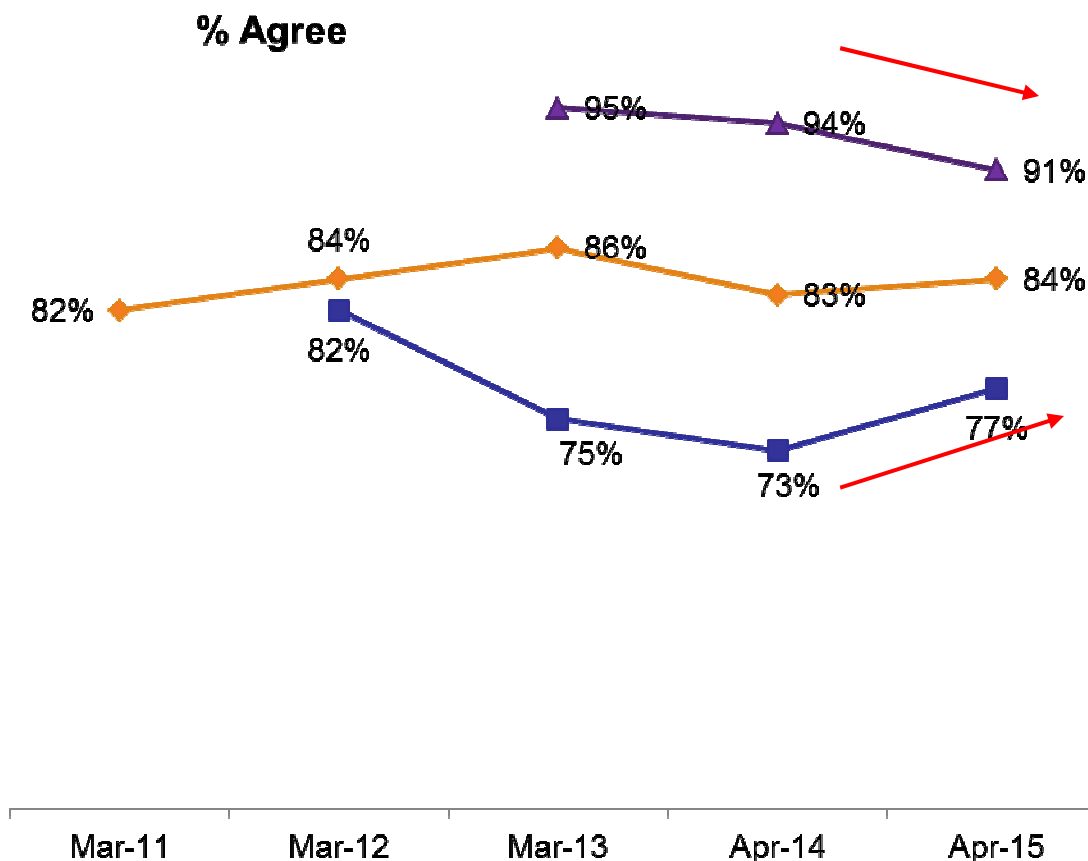
Agreement with Key Message Statements - Moms

While a large majority of moms feel that unstructured activities are an effective way to get kids physically active, this sentiment is down compared to the last two years. “The ad made me reconsider how much activity my child is getting” increased from last year. “Encouraging my child to be more active” remains at similar levels as years past.

◆ This ad made you feel like you should encourage your child to be more active

■ This ad made me reconsider how much activity my child is getting

▲ This ad made you feel that unstructured activities, like outdoor play with friends, are an effective way for kids to get the physical activity they need each day



Ad Impact on General Behaviour - Moms

Two thirds of Canadian moms have taken some action as a result of seeing the ad – on par with the Back to Play campaign, yet three quarters of Newfoundland and Labrador moms have taken some action.

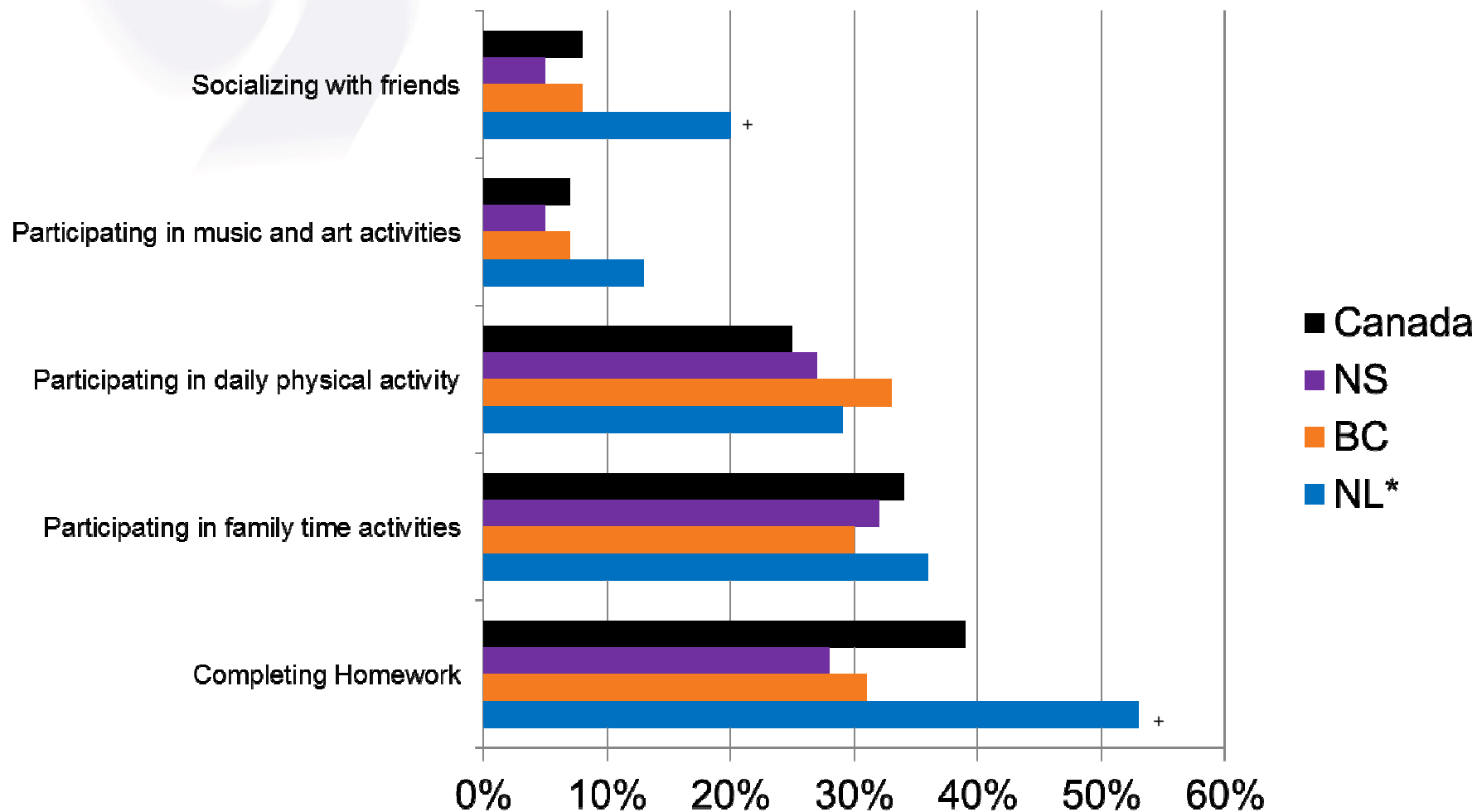
		Apr 2014	Mar 2013	Mar 2012	Mar 2011	ENG	FR	NL*
Done nothing	31%	33% ↑	28% ↓	33%	34%	33%	22%	24%
Talked to my children about being more active	31% ↑	25%	25%	27%	25%	32%	25%	24%
Made an effort to engage in active play with my child more often	31%	32%	40%	-	-	29%	40%	36%
Started doing more physical activity myself and/or as a family	27%	25% ↓	29%	28% ↑	24%	27%	32%	24%
Made an effort to create opps. for my children to engage in active play	27%	-	-	-	-	27%	23%	32%
Enforced rules for how much screen time my children accumulate	22%	-	-	-	-	22%	23%	20%
Planned a time when my children can be active	21%	20%	22%	17%	17%	19%	37%	20%
Talked to my spouse about encouraging my children to be more active	20%	18%	19%	21% ↑	14%	21%	18%	24%
Talked to my spouse or other parents about active play and our children	18%	-	-	-	-	17%	19%	24%
Set goals for how much activity my child/children will get each day of the week	15% ↑	9%	12%	11%	12%	13%	25%	16%
Looked for information about how to get more physically active	9%	10%	9%	9%	11%	8%	15%	16%
Visited the website for the organization that sponsored the ad	3%	2%	3%	2%	3%	1%	10%	-

Base: Respondents who have seen the ad on TV. Moms 2015 (n=336), Moms 2014 (n=562), 2013 (n=586), 2012 (n=376), 2011 (n=278) *Small Sample

Q.19 And, as a result of seeing this ad on television recently, have you done any of the following?

PHYSICAL ACTIVITY

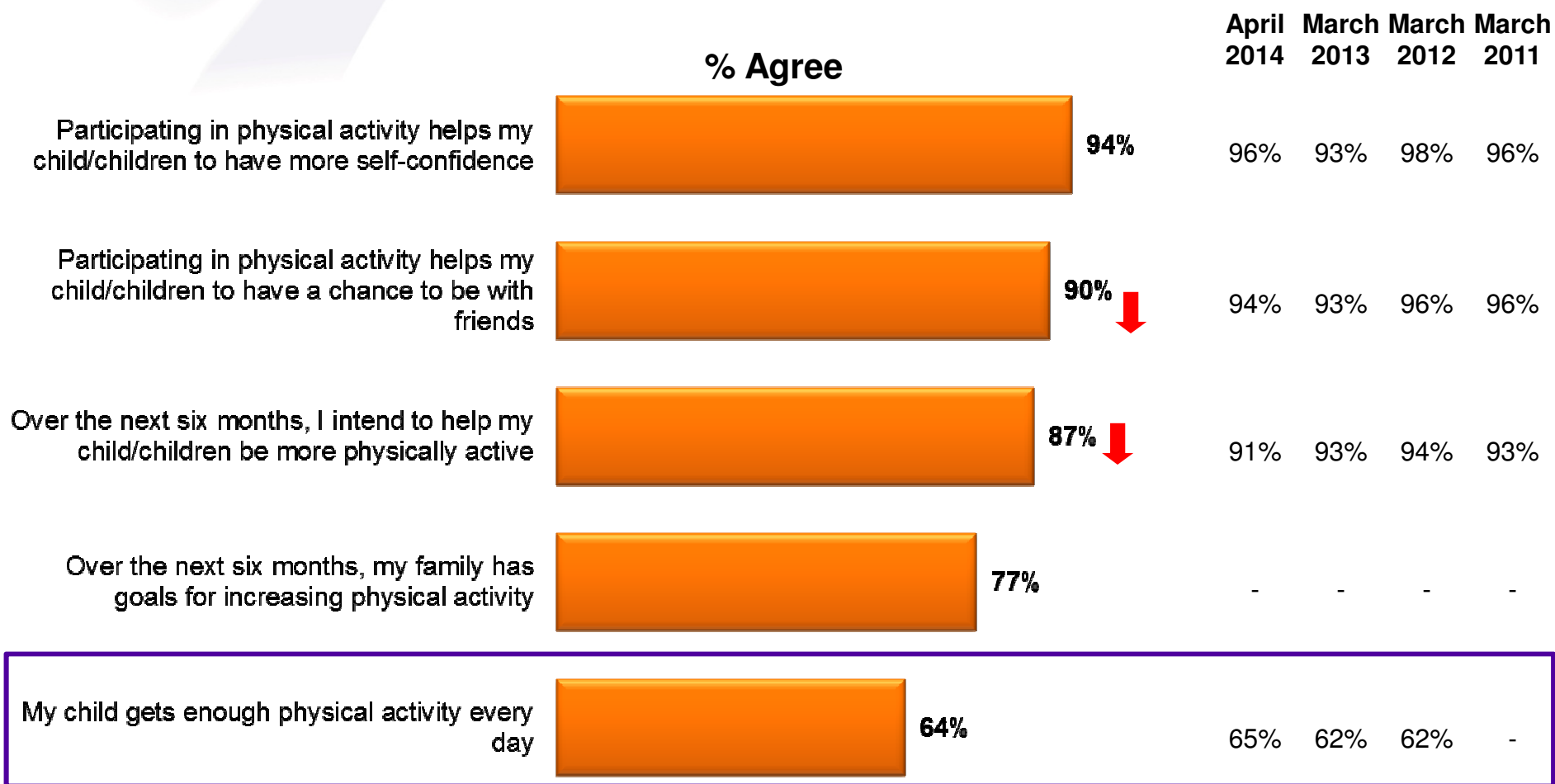
Moms' Priorities for their Children



Base: Respondents who have seen the ad on TV. Moms 2015 (n=336), Moms 2014 (n=562), 2013 (n=586), 2012 (n=376), 2011 (n=278) *Small Sample; +Significant Difference

Moms' Intentions To Child's Physical Activity

Like last year, two-thirds of Canadian moms believe their kids get enough physical activity. Moms are less likely this year to believe that participating in activities helps their child have a chance to be with friends and to intend to help their child be more physically active. Despite these negative movements, a large majority of moms do agree that physical activity benefits their children.

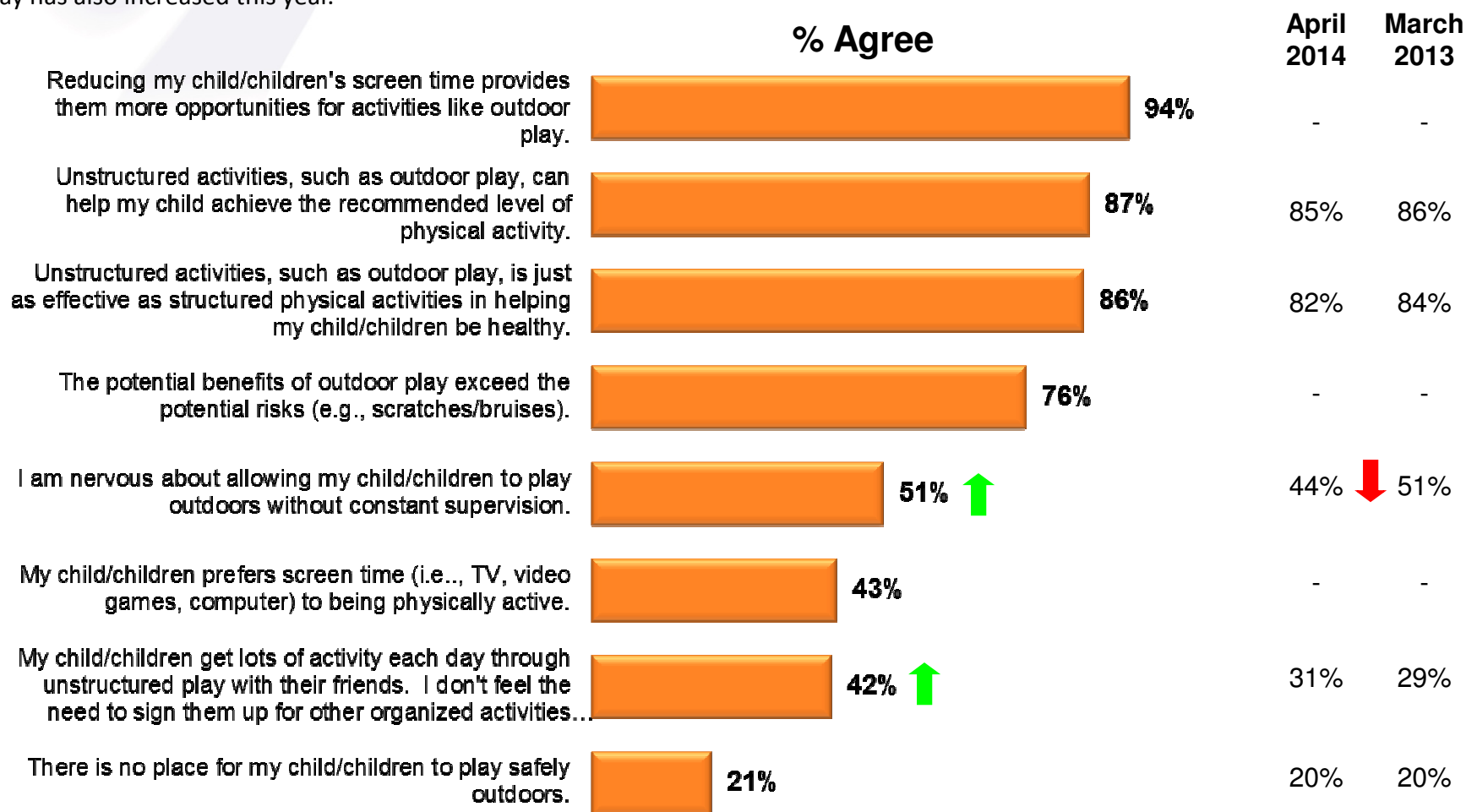


Base: Moms 5-11 (n=809)

Q2a. How much do you agree or disagree with the following statements?

Moms' Attitudes To Child's Physical Activity

Moms almost unanimously agree that reducing screen times provides more opportunities for play. Nervousness about allowing children to play outdoors without supervision has increased after dropping significantly in 2014. Moms who believe their children get enough unstructured play each day has also increased this year.



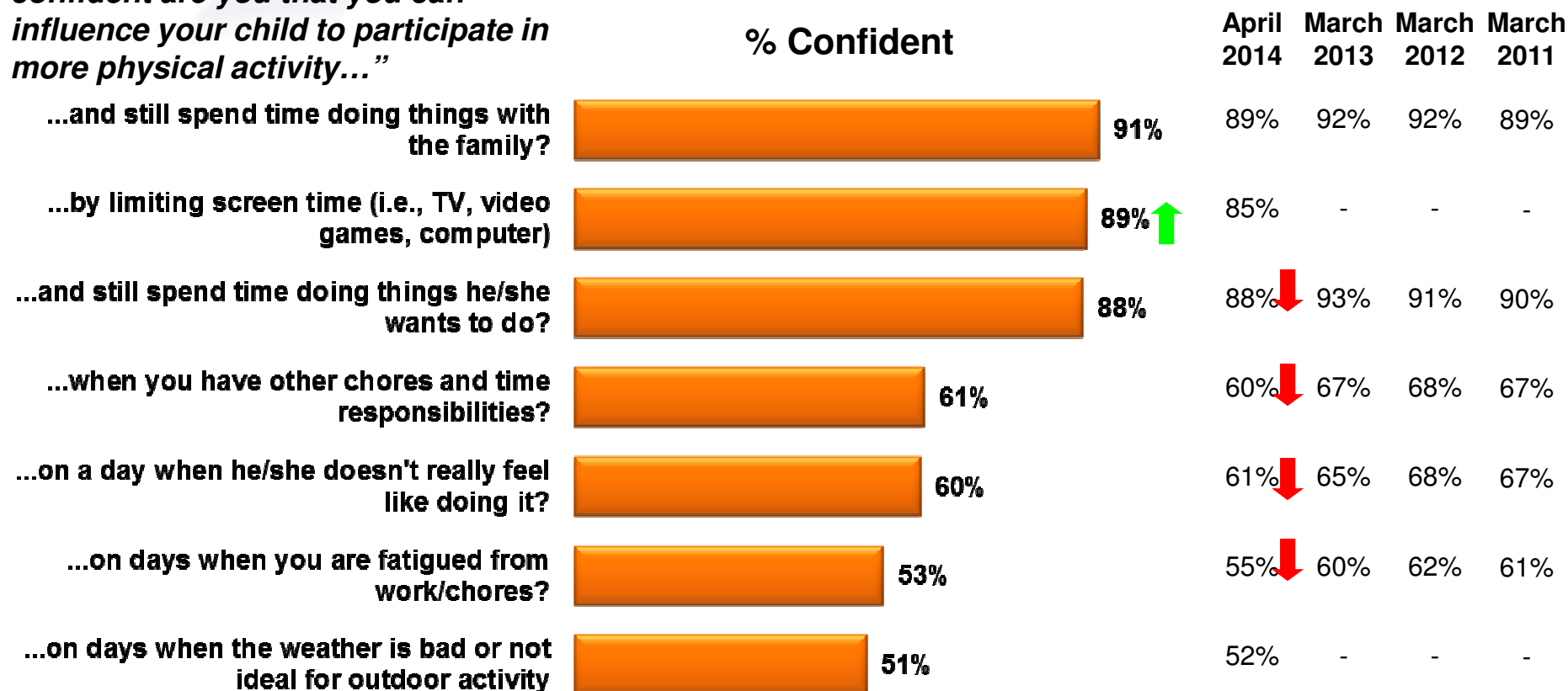
Base: Moms 5-17 (n=809)

Q2b. How much do you agree or disagree with the following statements?

Moms' Influence Over Child's Physical Activity

There has been little change in Moms' perceptions of their own ability to influence their child's physical activity compared to last year, except an increase in more moms who believe they could limit their child's screen time.

"If you really wanted to, how confident are you that you can influence your child to participate in more physical activity..."



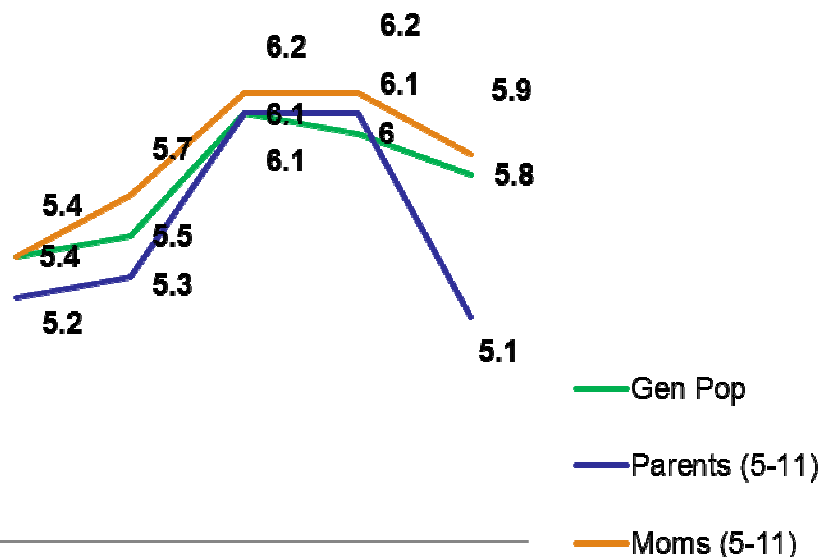
Base: Moms 5-11 (n=809)

Q2C. If you really wanted to, how confident are you that you can influence your child to participate in more physical activity...

Perceptions of Physical Activity Levels

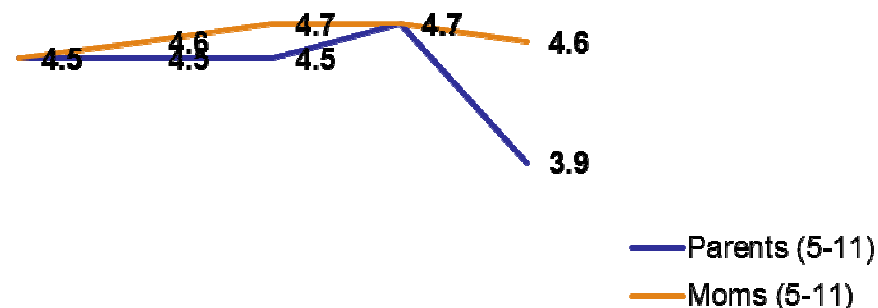
Moms, parents of kids 5-11, and gen pop all say, on average, that 6 days a week is an appropriate frequency for children to be physically active for at least 60 minutes. Moms and parents of kids 5-11 report that their child(ren) were active 4.6 and 3.9 days respectively in the past week, which is slightly higher than the number of days they report participating in physical activities themselves.

Days per week a child should be physically active for at least 60 minutes



March 2011 March 2012 March 2013 April 2014 April 2015

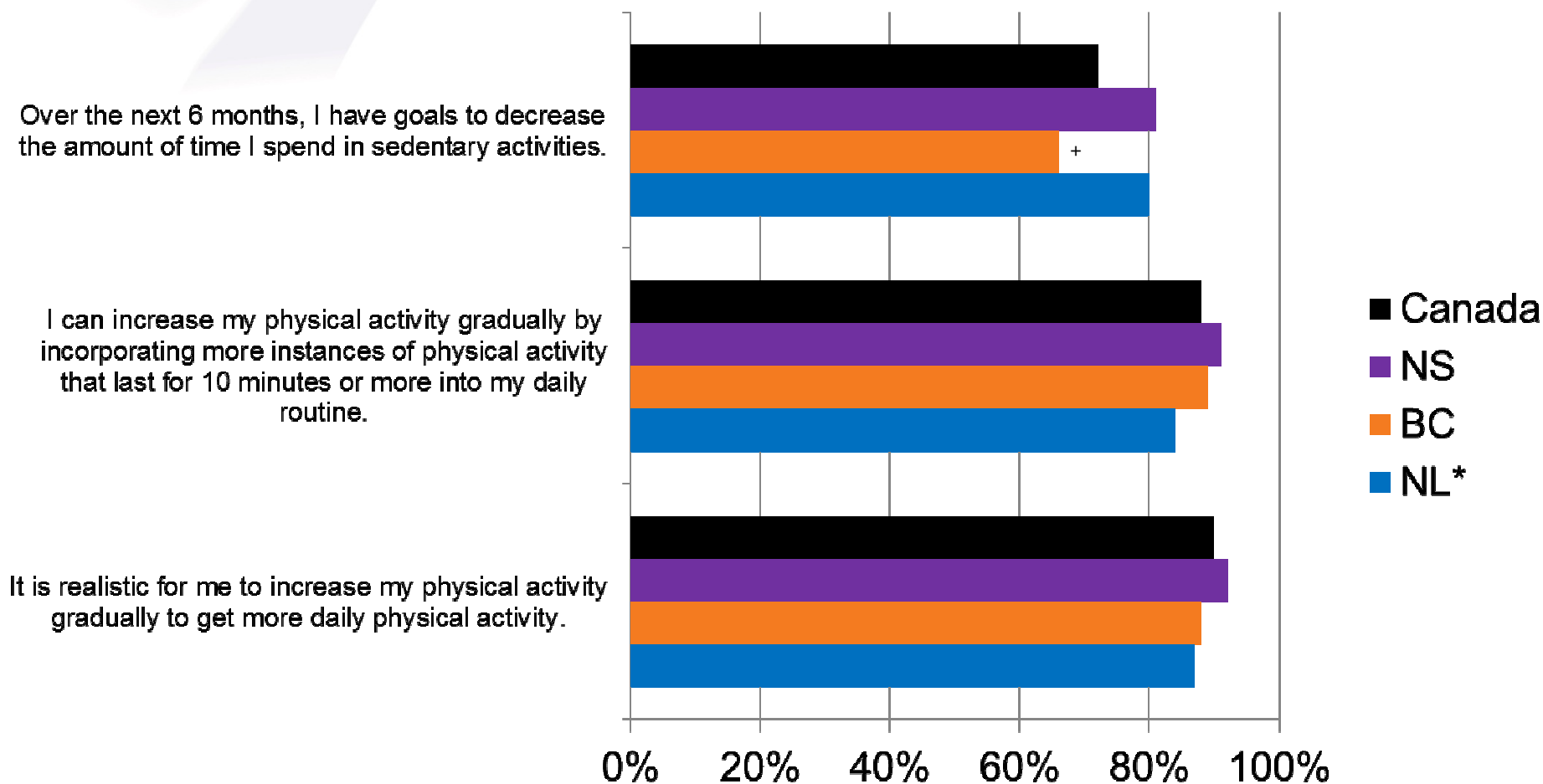
Days in past week your child was physically active for at least 60 minutes



March 2011 March 2012 March 2013 April 2014 April 2015

Base: All respondents; Gen Pop (n=767), Gen Pop Parents 5-11 (n=67) Moms 5-11 (n=809), excluding "Don't Know"
 Q.NEW2 In a typical week, on how many days was your child physically active for a total of at least 60 minutes per day?
 Q.NEW3 To the best of your knowledge, how many days of the week is it recommended a child aged 5-11 should be active for at least 60 minutes?

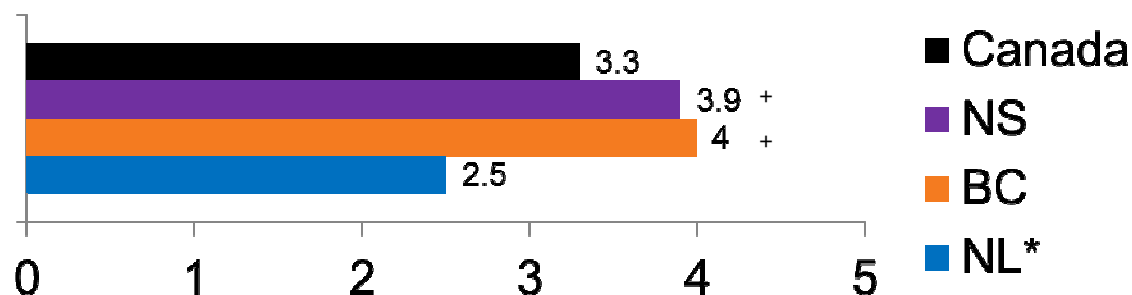
Most moms and Canadians believe they could realistically increase their physical activity. English moms are more likely to think so than French moms. Just under three quarters currently have goals to reduce the amount of time they spend in sedentary activities. BC moms are less likely than moms from Nova Scotia and Newfoundland to do so.



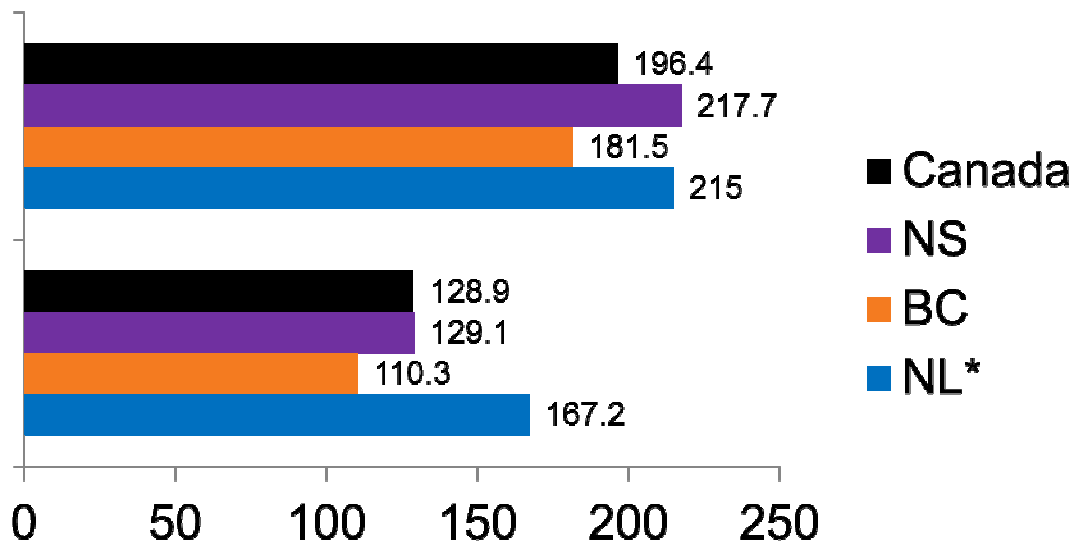
Base: Gen Pop (n=767), Moms (n=809); *Small Sample; +Statistically Significant
Q_Lifestyle_Changes How much do you agree or disagree with the following statements?

Moms report that their children spend an average of over three hours in front of a screen on weekend day and two hours on weekdays. They report restricting screen time and average of 3 days . Newfoundland and Labrador moms are less likely to restrict screen time and are more likely to report leisure screen time consumption among their children vs the rest of Canada.

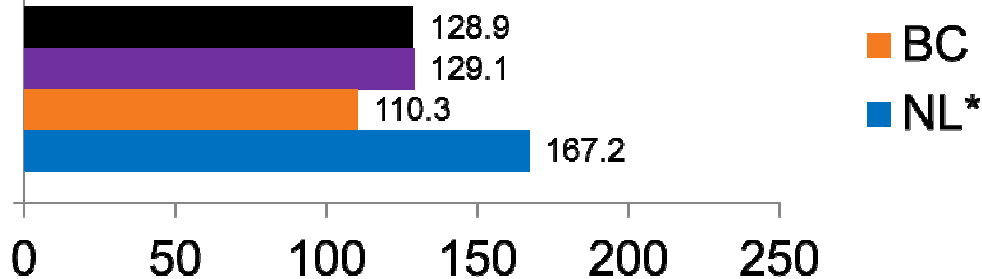
Average number of days you restrict your child from watching TV, playing video games, or using the computer for more than 2 hours per day during their free time.



Average number of minutes per weekend your child/children watch TV, use the computer, or play video games during their free time



Average number of minutes per weekday your child/children watch TV, use the computer, or play video games during their free time



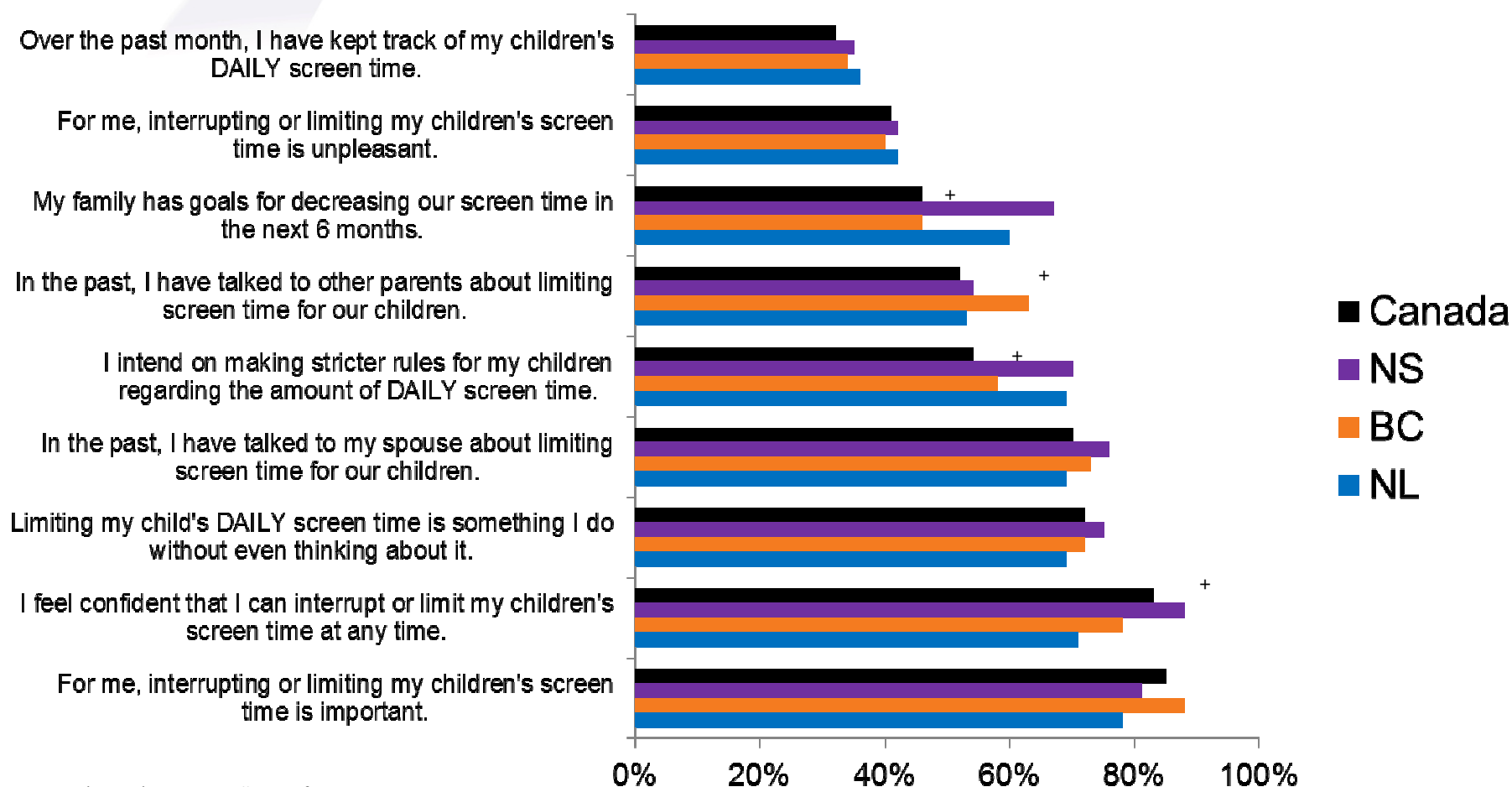
Base: Moms (n=539)

*Small sample; +Statistically Significant

Q_Screen_Time_Amount. On average, how many hours and minutes per day does your child/children watch TV, use the computer, play video games, during their free time?

Q_Screen_Time_Amount. In a typical week, how many days do you restrict your child from watching TV, playing video games, or using the computer for more than 2 hours per day during their free time, (not including the time they're doing homework)?

For a large majority of moms, limiting screen is top of mind . Only one third keep track of daily screen time. English moms are more likely to feel confident about their ability to limit screen time and to have talked about limiting their kids' screen time with their spouse. Newfoundland and Labrador moms are more likely to have goals for decreasing screen time and intentions to make stricter rules regarding the amount of daily screen time than the rest of Canada.

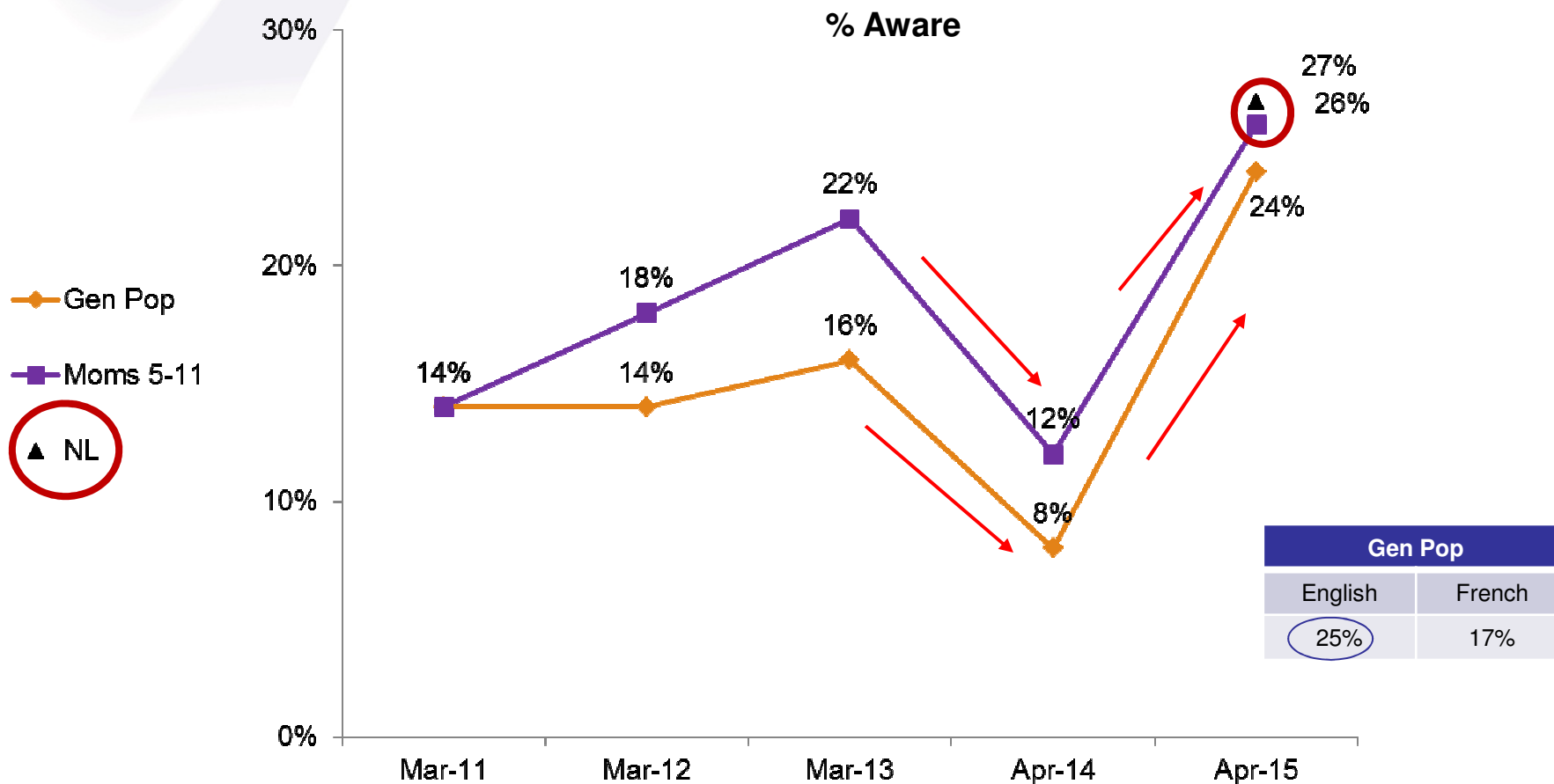


Base: Moms (n=809); ⁺Statistically Significant

Q_Statements_Screen_Time. How much would you agree or disagree with the following statements related to screen time?

Awareness of Physical Activity Guidelines for Children

Awareness of the physical activity guidelines for children/youth has increased significantly to levels higher than March 2013. English Canadians are more likely to be aware of the guidelines than French Canadians.

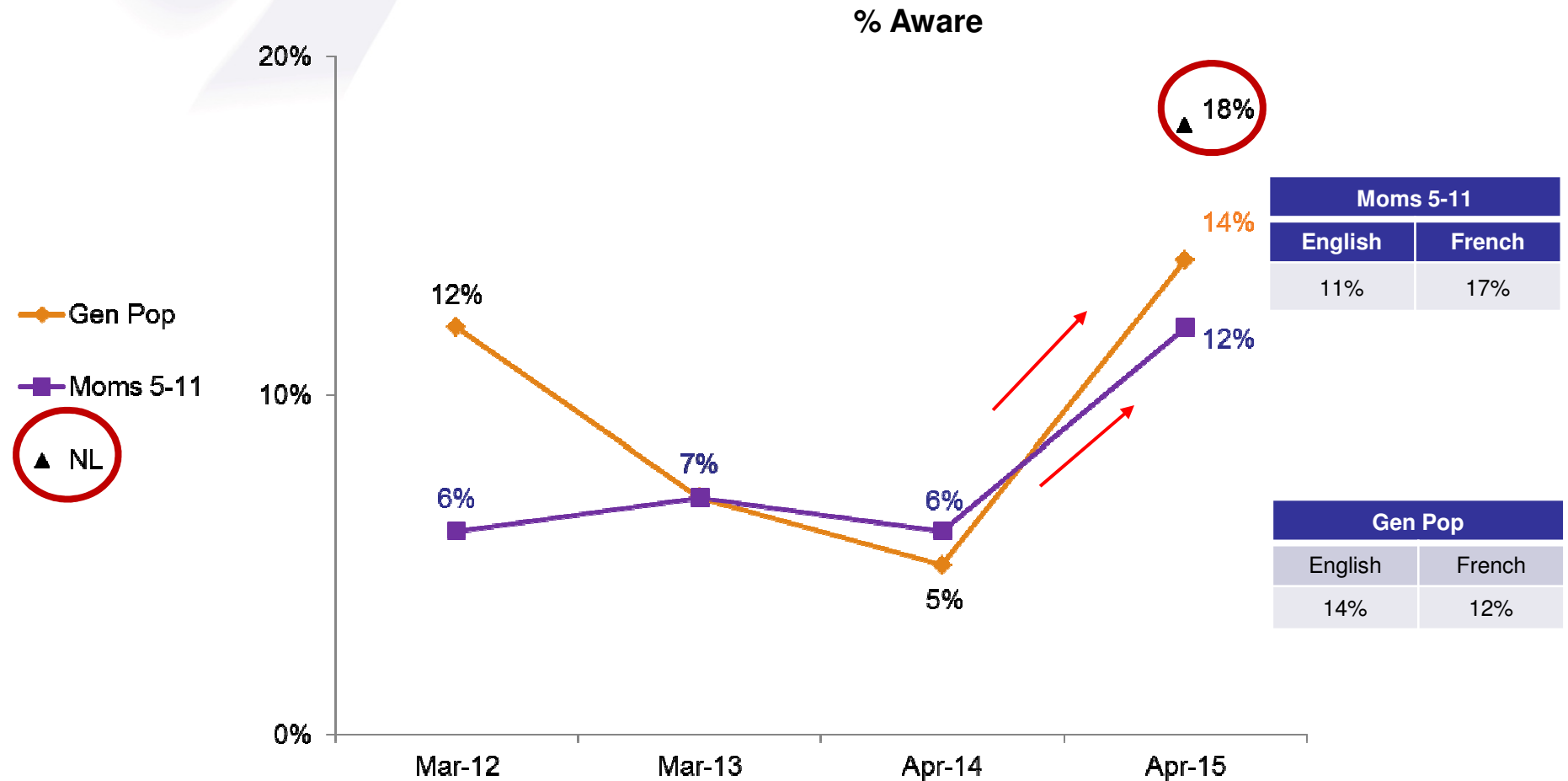


Base: All respondents; Gen Pop (n=767); Moms (n=809)

Q.20a Have you heard of the Canadian Physical Activity Guidelines for Children and Youth announced in January 2011?

Awareness of the Canadian Physical Activity Guidelines for Adults

Awareness of the physical activity guidelines for adults has also increased although still remains low among the Canadians and moms.



Base: All respondents; Gen Pop (n=767); Moms (n=809)
 Q.20c Have you heard of the Canadian Physical Activity Guidelines for Adults, announced in January 2011?