



# National Geographic awareness and reputation TRACKING

-wave 3- March 2017



## Background

FNG needs to measure the awareness and the reputation of National Geographic in different moments in time, in order to assess the effectiveness of the initiatives carried out during the same period. For this reason, FNG asked to Toluna to develop a tracking study in 4 quarterly waves.

This documents reports the results of the third wave (March 2017), compared - whenever possible - with the results of the previous two.

# Business questions

- Measuring the awareness and the reputation of Nat Geo, targeting a representative sample of the **Italian population.**
- Measuring the awareness, the reputation and the satisfaction of Nat Geo channels among a sample of SKY customers








# SUMMARY

# Summary - risultati su popolazione

Il ricordo di Nat Geo, sia a livello spontaneo, sia sollecitato, é generalmente alto. Insieme a Discovery e Focus rappresenta una buona parte della awareness spontanea dei brand del settore.




	 TV CHANNEL			 MAGAZINE			 WEBSITE		
	W1	W2	W3	W1	W2	W3	W1	W2	W3
AWARENESS SPONTANEA	21%	25%	25%	13%	16%	12% ↓	9%	9%	8%
AWARENESS SOLLECITATA	64%	62%	67% ↑	57%	58%	64% ↑	54%	54%	58%
NPS	34	34	28	26	28	23	27	35	22

Rispetto alla wave precedente, i valori rimangono in generale stabili. Da evidenziare che la spontanea del Magazine ritorna ai livelli di wave 1 (12%) , mentre salgono significativamente la sollecitata di National Geographic Channel (67%) e di National Geographic Magazine (64%). Aumenta la sollecitata del Website (58%) ma non in maniera significativa. Gli NPS diminuiscono per una lieve attenuazione del giudizio complessivo, che rimane comunque positivo, e sono superiori o in linea a quelli dei competitor principali.

In termini di immagine il brand é sempre percepito come una istituzione tra i brand del settore: **brand di qualità, curato, ricco di contenuti, interessanti e per tutta la famiglia.** Continua ad essere percepito poco come giovane, attuale, originale e divertente

# Summary - risultati su Sky Owners

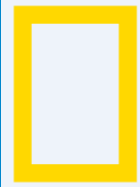
Il ricordo di Nat Geo, sia a livello spontaneo, sia sollecitato, é molto alto. Insieme a Discovery e Focus rappresenta una buona parte della awareness spontanea dei brand del settore.

	 TV CHANNEL			 MAGAZINE			 WEBSITE		
	W1	W2	W3	W1	W2	W3	W1	W2	W3
AWARENESS SPONTANEA	32%	36%	31%	14%	23%	17%	12%	14%	12%
AWARENESS SOLLECITATA	93%	90%	94%	67%	72%	76%	67%	69%	70%
NPS	30	39	31	11	32	23	14	39	21

Tra gli abbonati Sky, rispetto alla wave precedente, non ci sono differenze significative per quanto riguarda l'awareness. Gli NPS si assestano in un valore intermedio tra i valori della prima e quelli della seconda wave.

**In termini di immagine** il brand é percepito anche tra i possessori Sky come una istituzione del settore: **brand di qualità, curato , ricco di contenuti, interessanti e per tutta la famiglia. Viene però ancora percepito poco come giovane, attuale, originale e divertente**

# BRAND AWARENESS, IMAGE & NPS



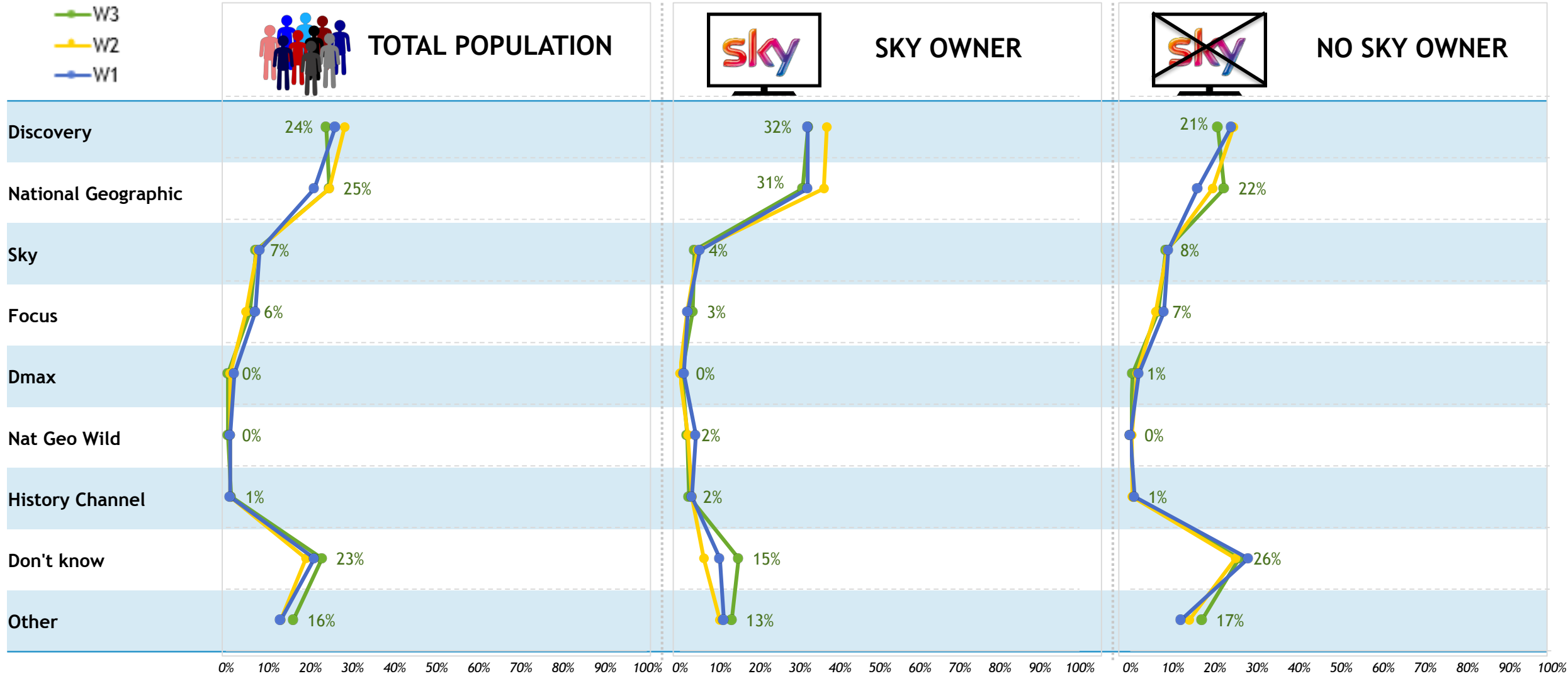
**NATIONAL  
GEOGRAPHIC**



# National Geographic Spontaneous Awareness is in line with previous waves (25%).



D7. Quale canale televisivo che tratta di contenuti legati al mondo della natura e del documentario presente sulla Pay Tv le viene in mente per primo?



Base: total sample: 810 respondents - Sky Owner 218 respondents - No Sky Owner: 592 respondents

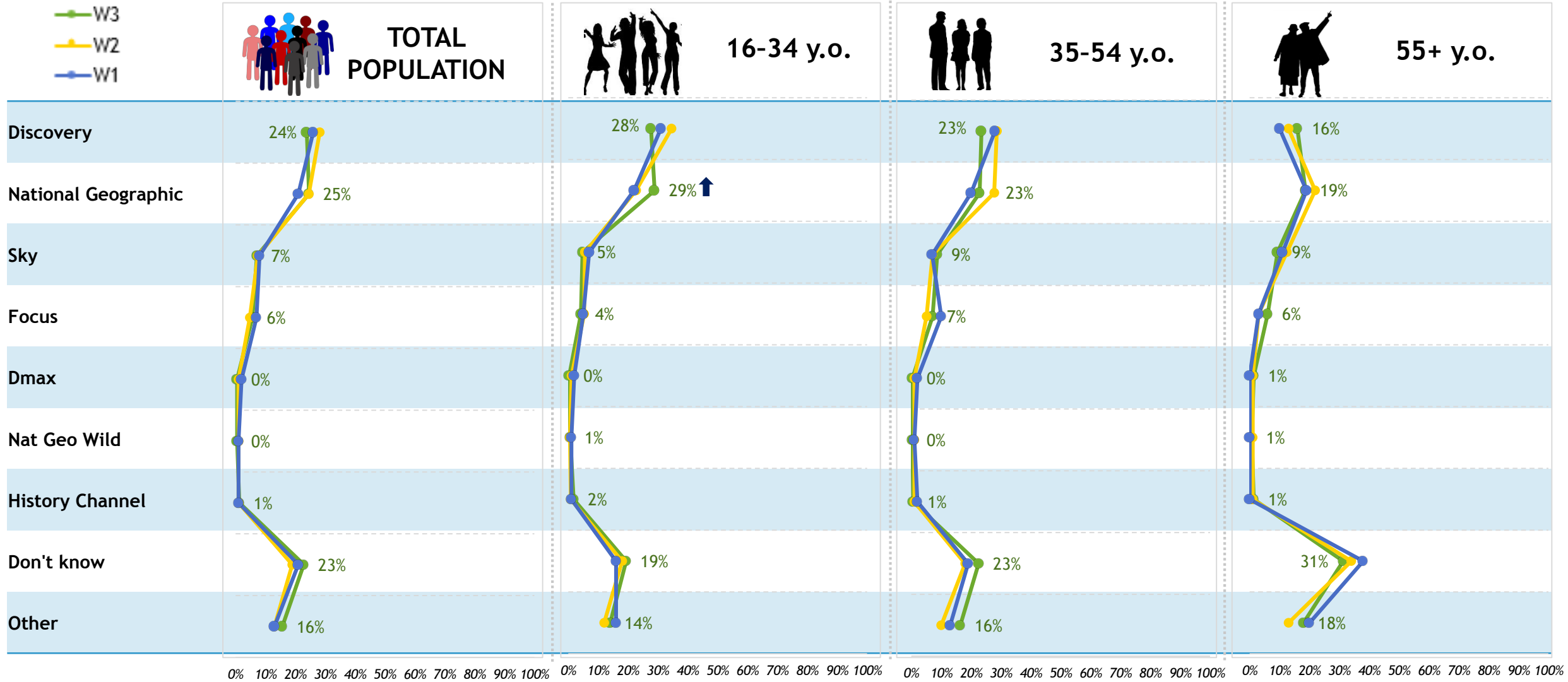
↑/↓ statistically different at 95% confidence level vs previous wave



# Spontaneous Awareness by age shows that awareness increased among 16-34 Y.O. and now is in line with Discovery one's.



D7. Quale canale televisivo che tratta di contenuti legati al mondo della natura e del documentario presente sulla Pay Tv le viene in mente per primo?

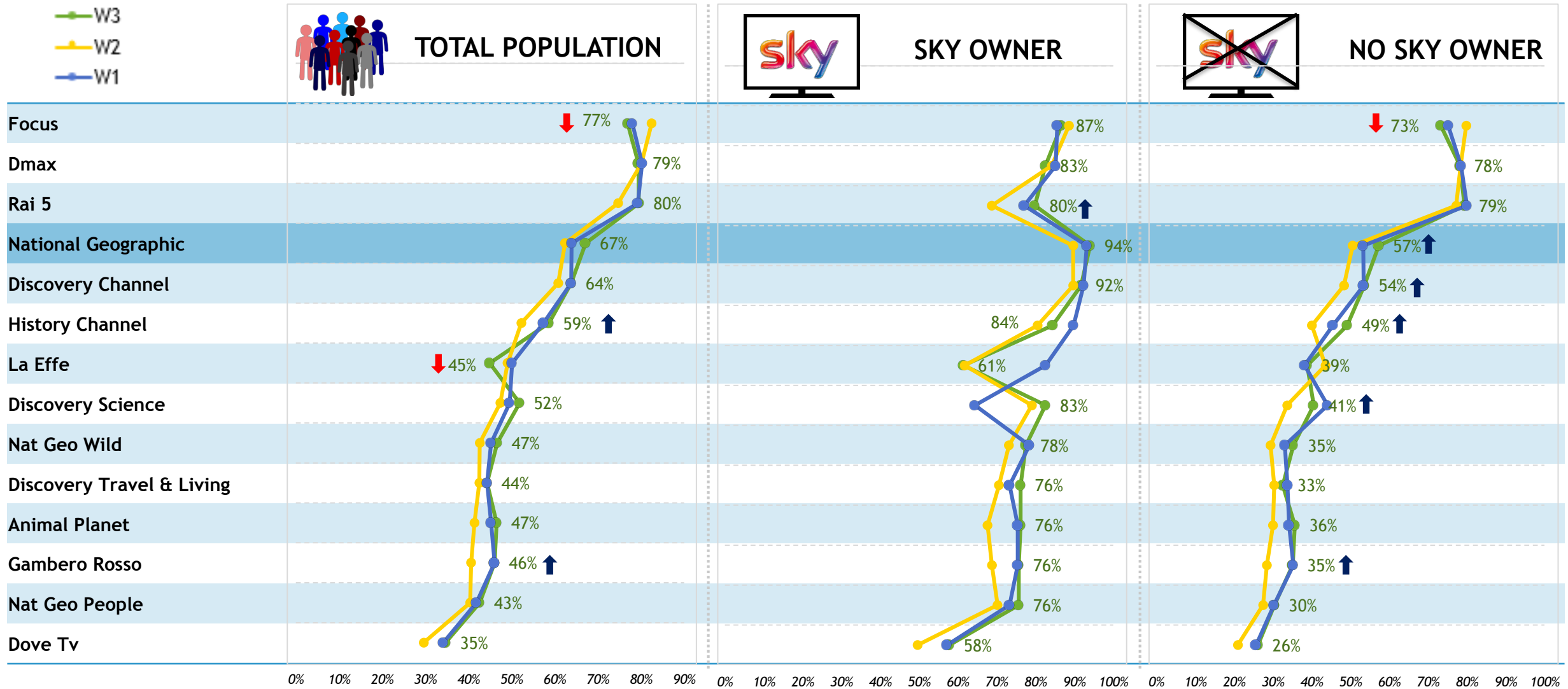


BaseBase: total sample: 810 respondents - 16-34 y.o.: 336 - 35-54 y.o.: 324 - 55+ y.o.: 150

↑/↓ statistically different at 95% confidence level vs previous wave

Prompted awareness (seen the channel at least once) is as high as Discovery's on Nat rep sample as well as among Sky owners.

D8. Di seguito troverá elencati una serie di canali televisivi che trasmettono contenuti legati al mondo della natura e del documentario, quali di questi vede in tv...? (scala 5 punti + non conosco)

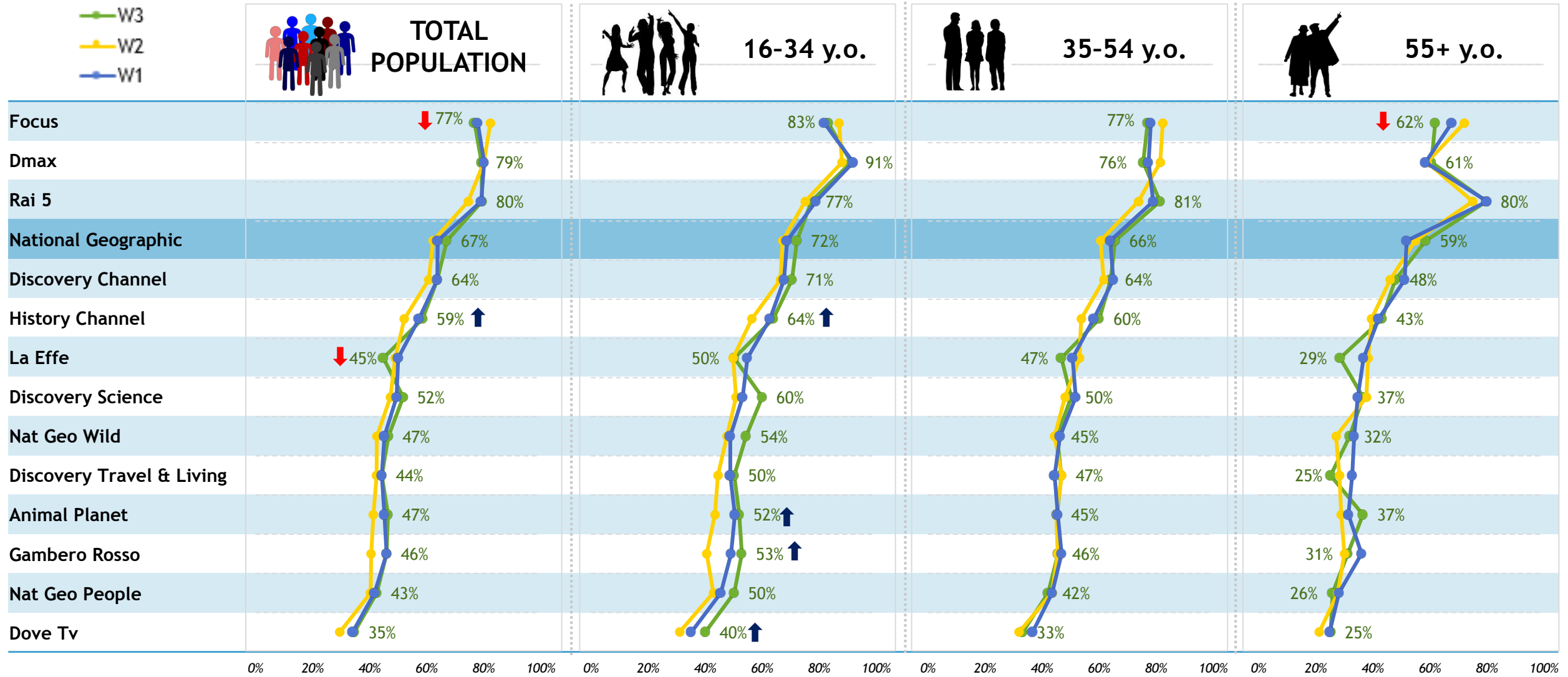


Base: total sample: 810 respondents - Sky Owner 218 respondents - No Sky Owner: 592 respondents

↑/↓ statistically different at 95% confidence level vs previous wave

Prompted awareness (seen the channel at least once) for NatGeo is significantly higher among 16-34 y.o. vs the other age groups. The same is true for Discovery.

D8. Di seguito troverá elencati una serie di canali televisivi che trasmettono contenuti legati al mondo della natura e del documentario, quali di questi vede in tv...? (scala 5 punti + non conosco)



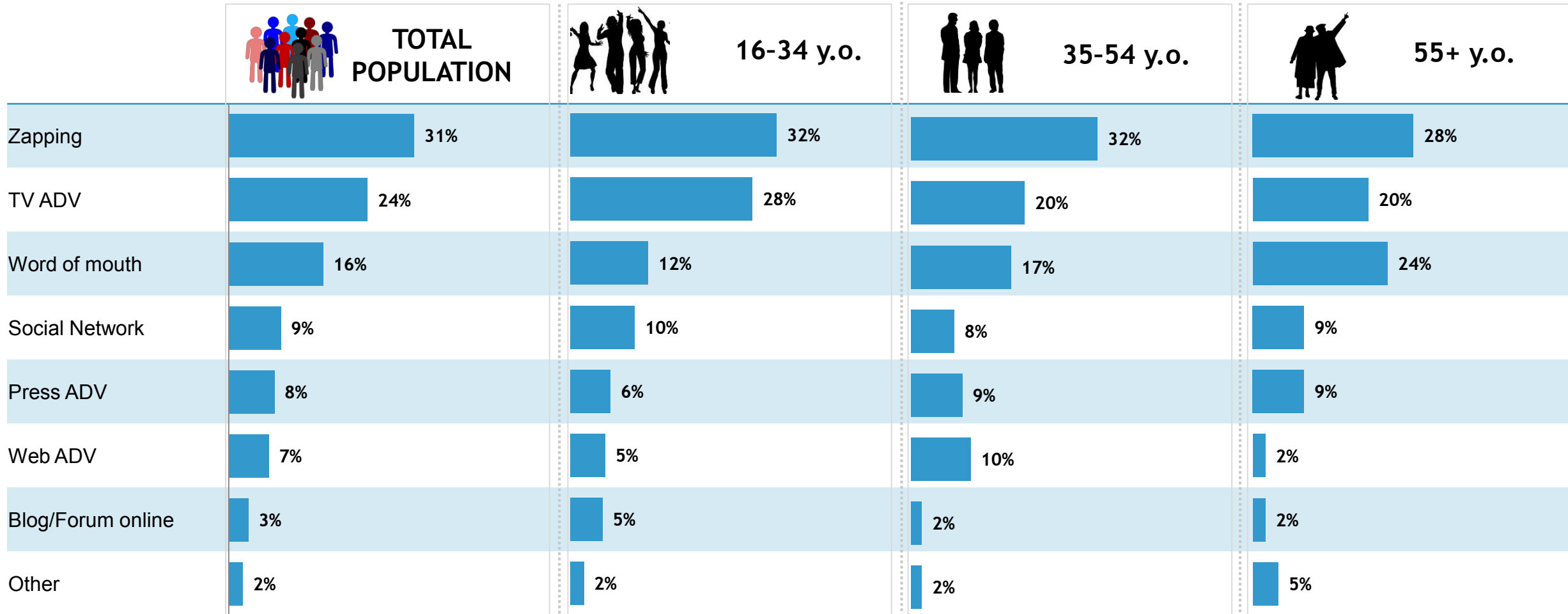
BaseBase: total sample: 810 respondents - 16-34 y.o.: 336 - 35-54 y.o.: 324 - 55+ y.o.: 150

↑/↓ statistically different at 95% confidence level vs previous wave

# Main source of awareness for NatGeo channel is zapping followed by TV adv.



D9. Come é venuto a conoscenza di National Geographic Channel?

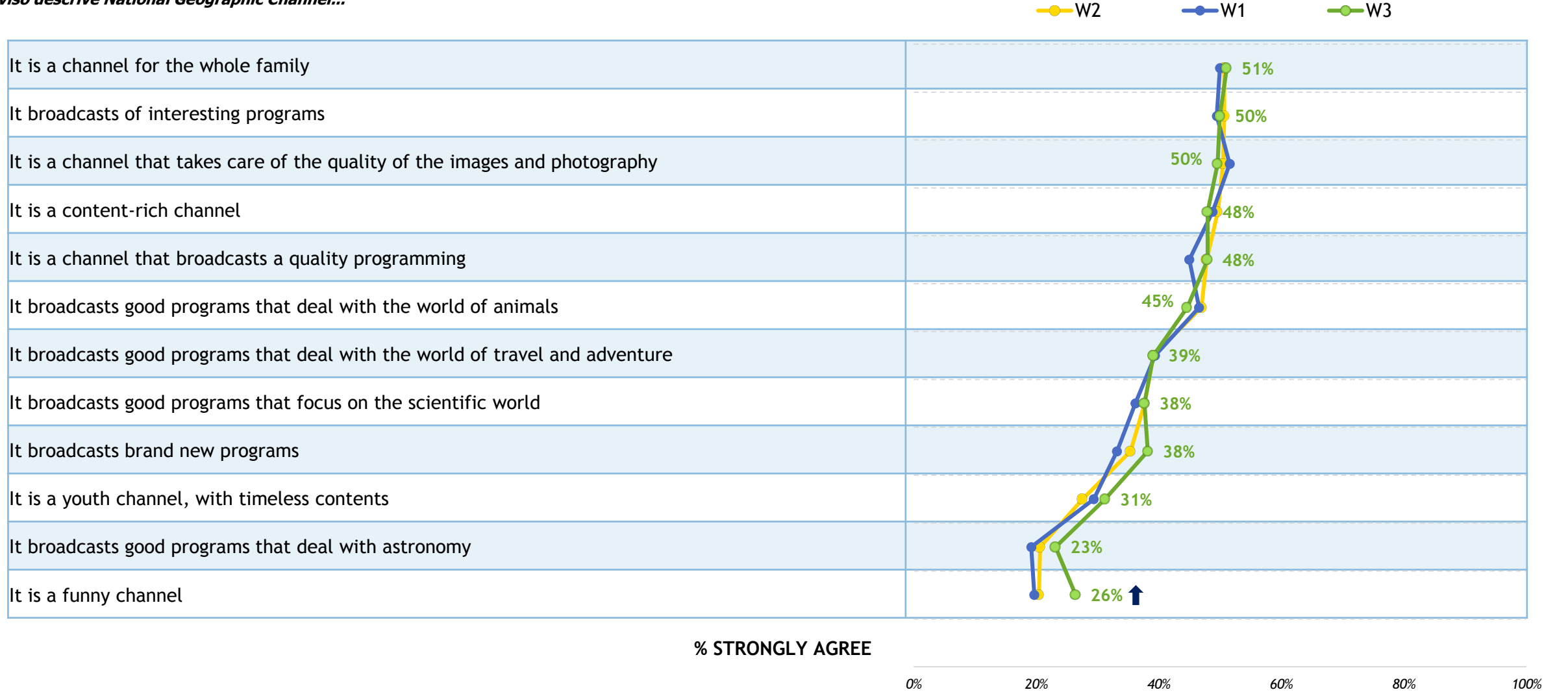


Base: Know National Geographic: 544 respondents - 16-34 y.o.: 243 respondents - 35-54 y.o.: 213 respondents - 55+ y.o.: 88 respondents

NatGeo image relies on quality of the pictures, broadcasting of interesting programs and suitability for the family. Comparing Wave 3 with Wave 2, it performs significantly better on “it is a funny channel” and directionally better on “broadcast brand new programs”



**D10. Di seguito troverá alcune caratteristiche che si riferiscono ai canali televisivi che trasmettono contenuti legati al mondo della natura e del documentario. Per ognuna di essi mi dovrà dire se a suo avviso descrive National Geographic Channel...**



% STRONGLY AGREE

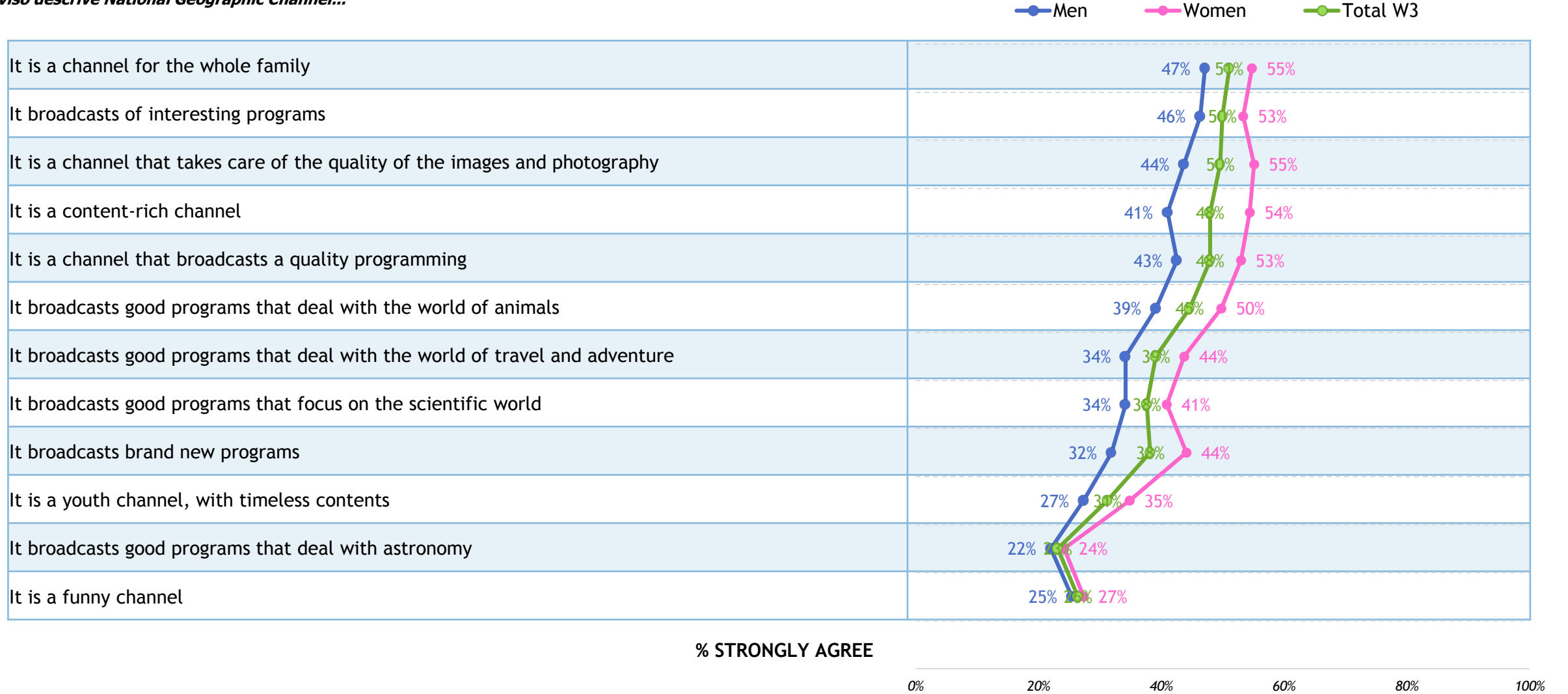
0% 20% 40% 60% 80% 100%

Base: Nat. Geo. Watchers- W1 = 564 respondents - W2 = 562 respondents W3 = 544 respondents

NatGeo image relies (especially among women) on quality of the pictures, broadcasting of interesting/quality programs and suitability for the family. Women also think it is a content-rich channel.



**D10. Di seguito troverá alcune caratteristiche che si riferiscono ai canali televisivi che trasmettono contenuti legati al mondo della natura e del documentario. Per ognuna di essi mi dovrá dire se a suo avviso descrive National Geographic Channel...**

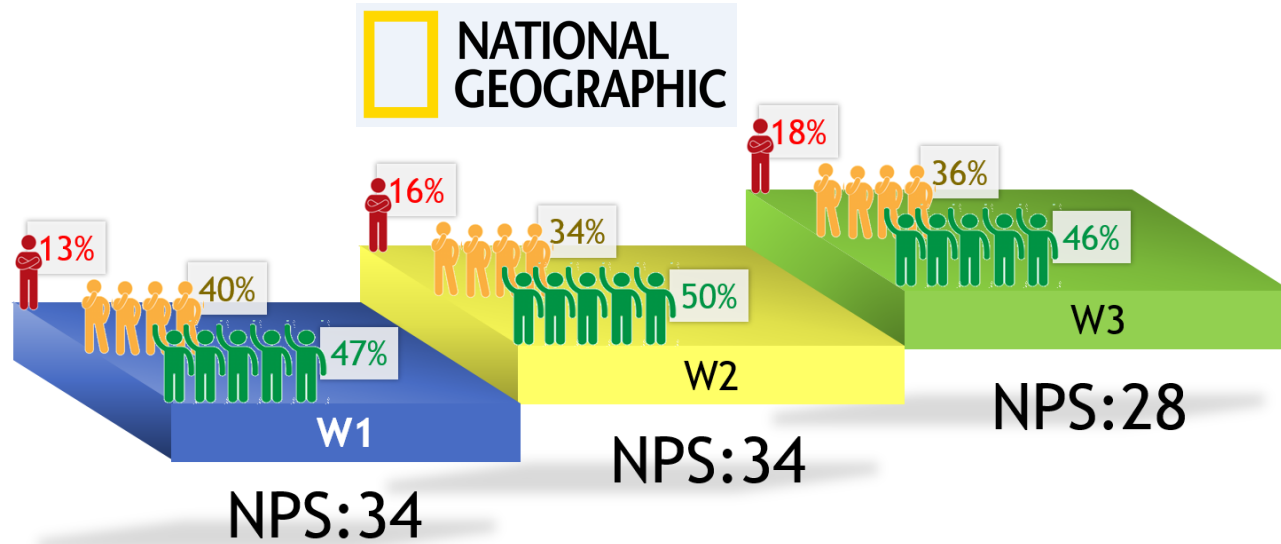


Base: Nat. Geo. Watchers-W3 = 544 respondents; Men = 263; Women = 281

# NatGeo's NPS decreases from 34 to 28 but keeps an overall positive rating



D11. Consiglierebbe ad amici / parenti / conoscenti National Geographic come scelta per il proprio tempo speso davanti alla TV?



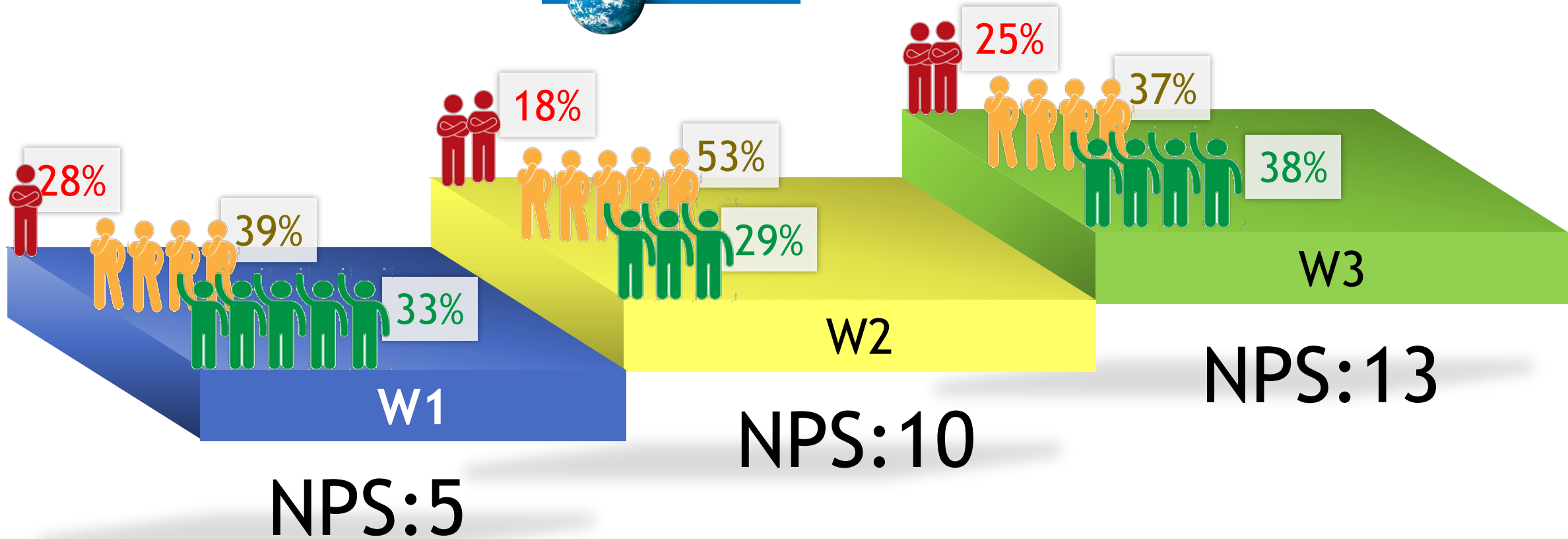
Average	
W2	W3
8.2	8.0

The NPS slightly decreases though within a still very positive overall rating (average value is a solid 8.0). Promoters are 4% less, half of them moving towards a more neutral judgment, though such a movement is not statistically significant.

# Discovery's NPS scores 13, 3 points higher than in December 2016, but still far from NatGeo (28)



D11. Consiglierebbe ad amici / parenti / conoscenti History Channel come scelta per il proprio tempo speso davanti alla TV?



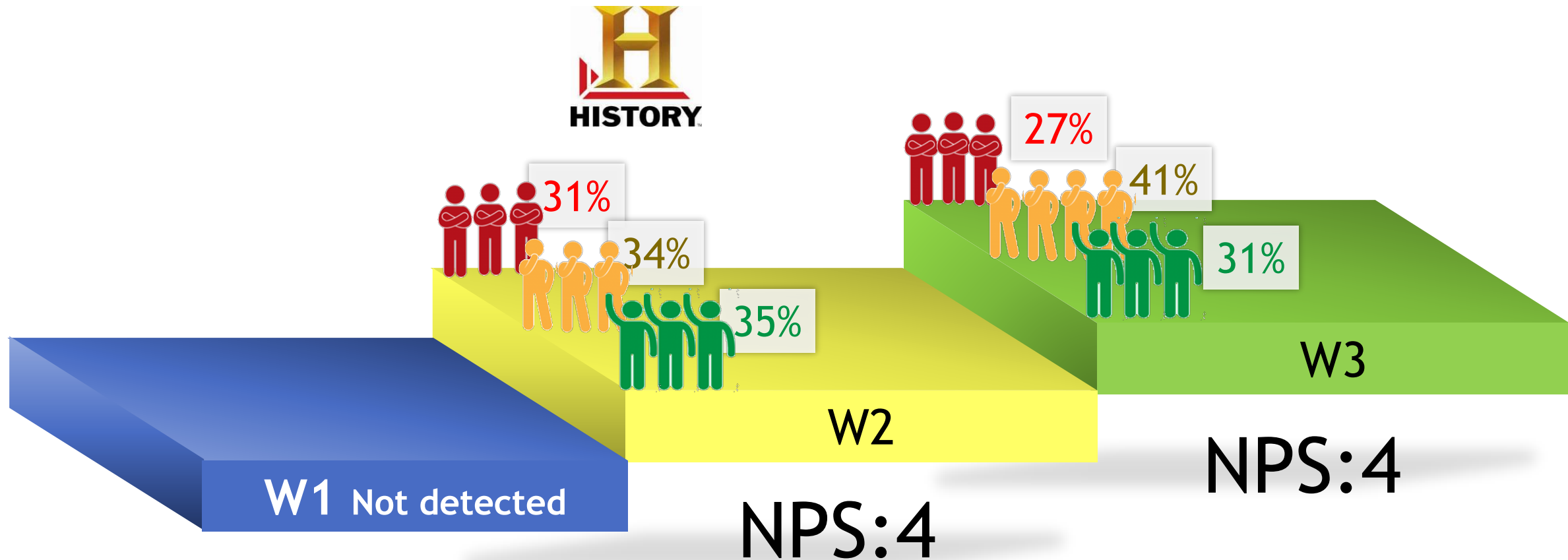
Base: Discovery. Watchers- W1 = 456 respondents - W2 = 548 respondents W3 = 517 respondents



# History Channel's NPS is 4, same as in Wave 2. Though positive, the score is clearly less powerful than Nat Geo's NPS (28)



D11. Consiglierebbe ad amici / parenti / conoscenti History Channel come scelta per il proprio tempo speso davanti alla TV?



Base: History Channel Watchers - W2 = 471 respondents; W3 = 475 respondents

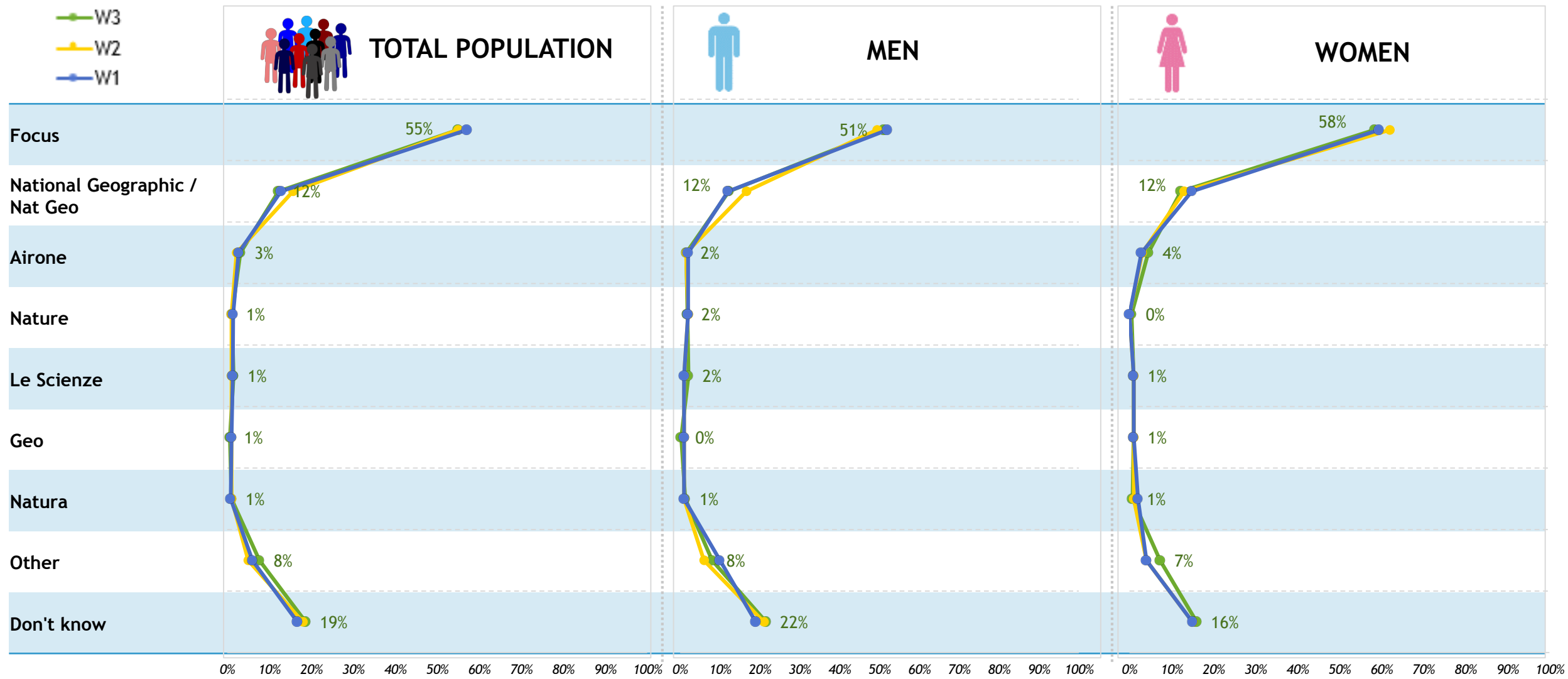
# BRAND AWARENESS, IMAGE & NPS





# Focus' Spontaneous Awareness is 43pts higher than Nat Geo's. However Nat Geo is still the second brand spontaneously mentioned.

D12. Quale magazine/rivista che tratta di contenuti legati al mondo della natura e della divulgazione scientifica le viene in mente per primo?

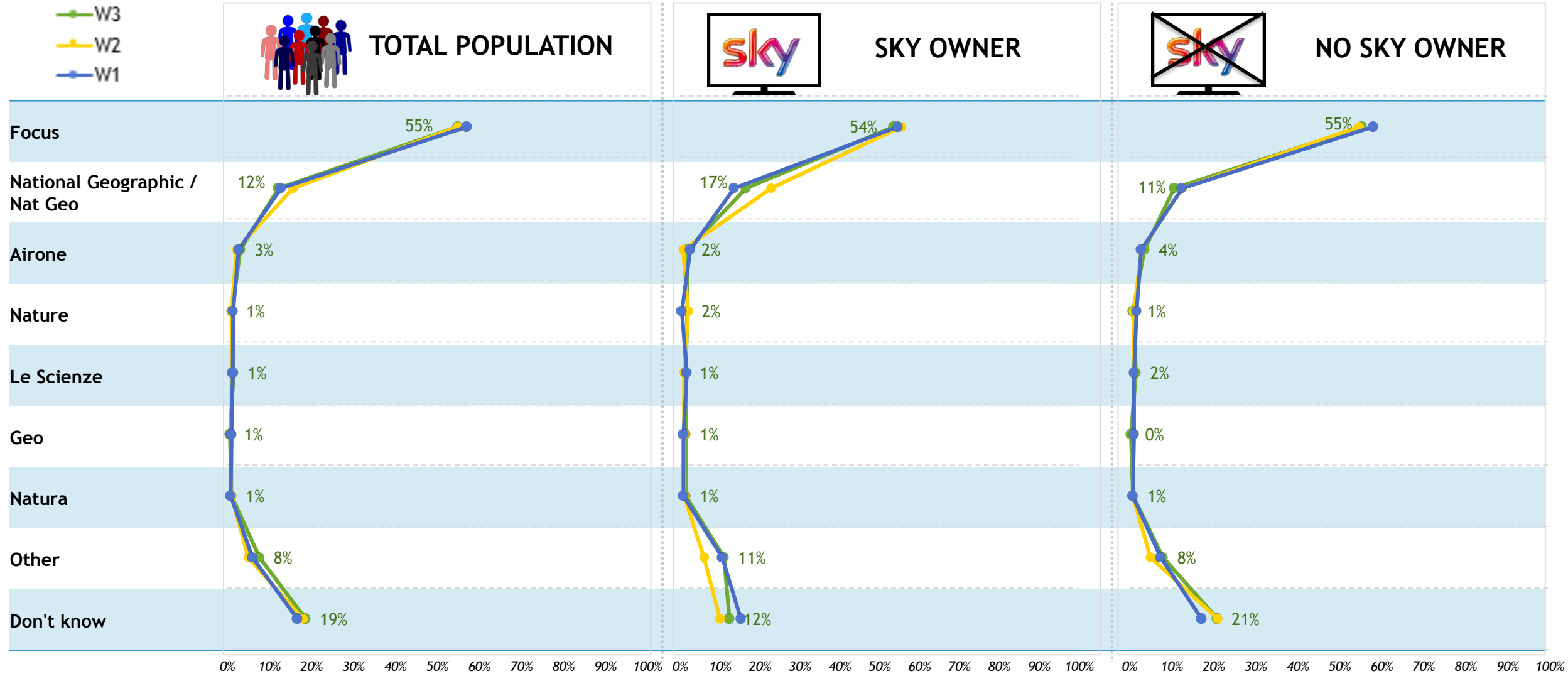


Base: total sample: 810 respondents : Men = 385; Women = 425



# NatGeo awareness is in line with wave 2 (12%) among all targets

D12. Quale magazine/rivista che tratta di contenuti legati al mondo della natura e della divulgazione scientifica le viene in mente per primo?



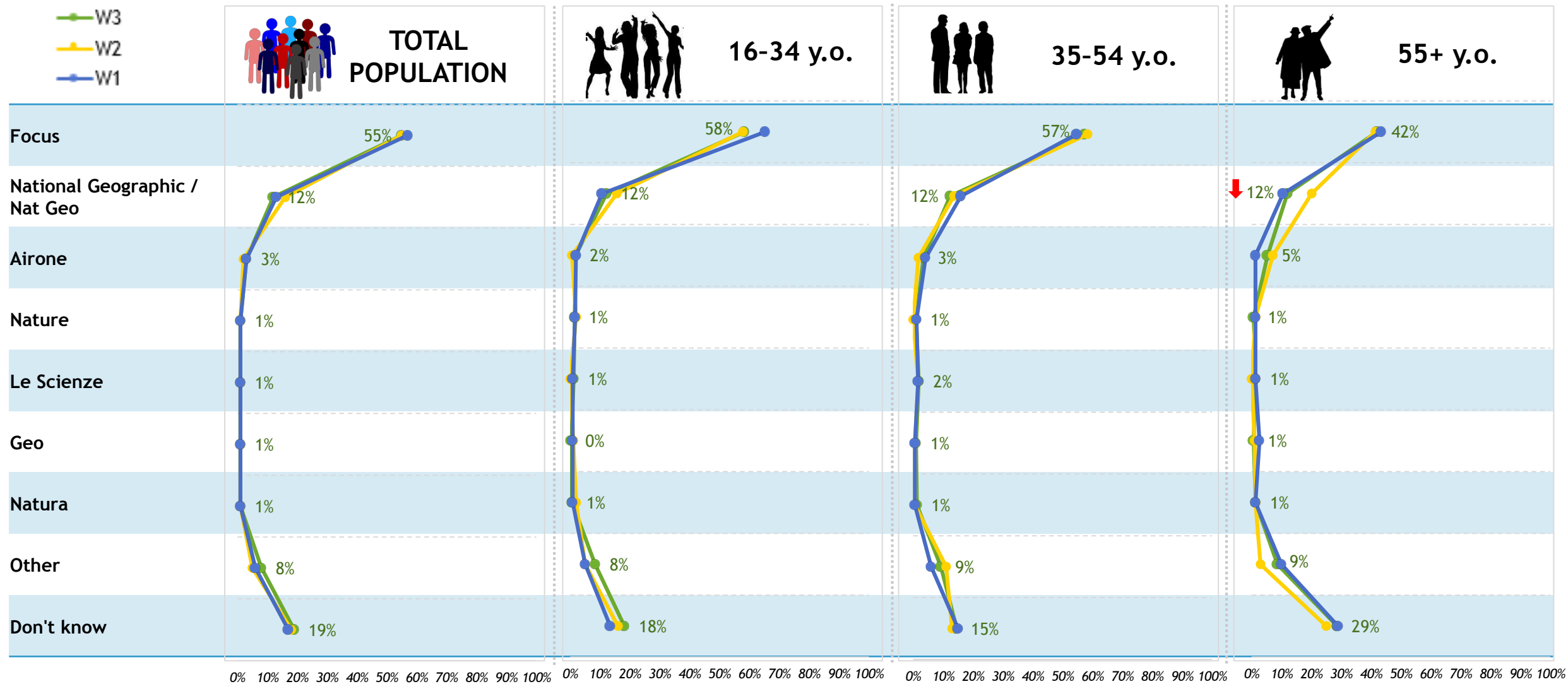
Base: total sample: 810 respondents - Sky Owner 218 respondents - No Sky Owner: 592 respondents

↑/↓ statistically different at 95% confidence level vs previous wave

# NatGeo magazine unaided awareness relevantly decreases among 55 Y.O. or more



D12. Quale magazine/rivista che tratta di contenuti legati al mondo della natura e della divulgazione scientifica le viene in mente per primo?



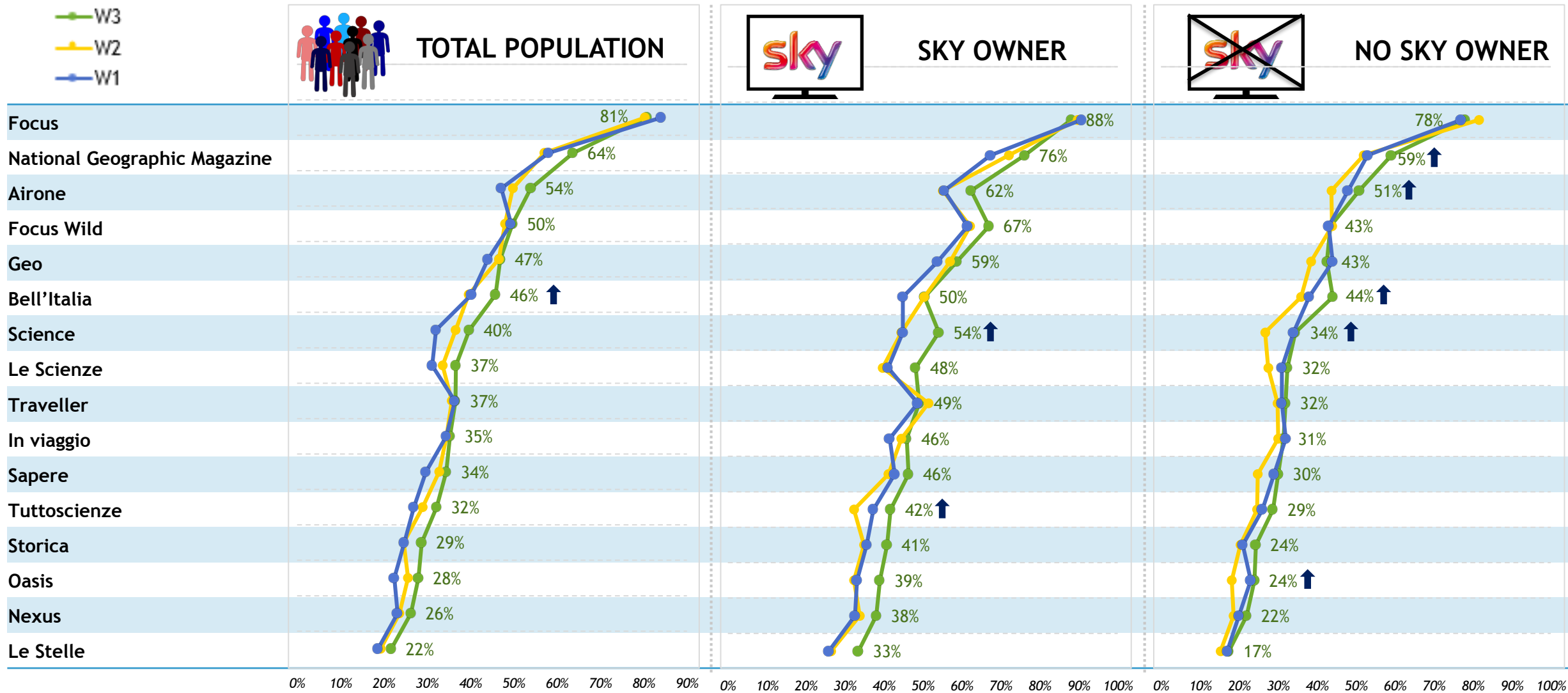
BaseBase: total sample: 810 respondents - 16-34 y.o.: 336- 35-54 y.o.: 324 - 55+ y.o.: 150

↑/↓ statistically different at 95% confidence level vs previous wave

# When prompted (read the magazine at least once), Nat Geo remains the second brand mentioned and it's below Focus. It gains 7% versus wave 2



D13. Di seguito troverá elencati una serie di magazine/riviste che trattano di contenuti legati al mondo della natura e della divulgazione scientifica, quali di queste legge...? (scala 5 punti + non conosco)



Base: total sample: 810 respondents - Sky Owner 218 respondents - No Sky Owner: 592 respondents

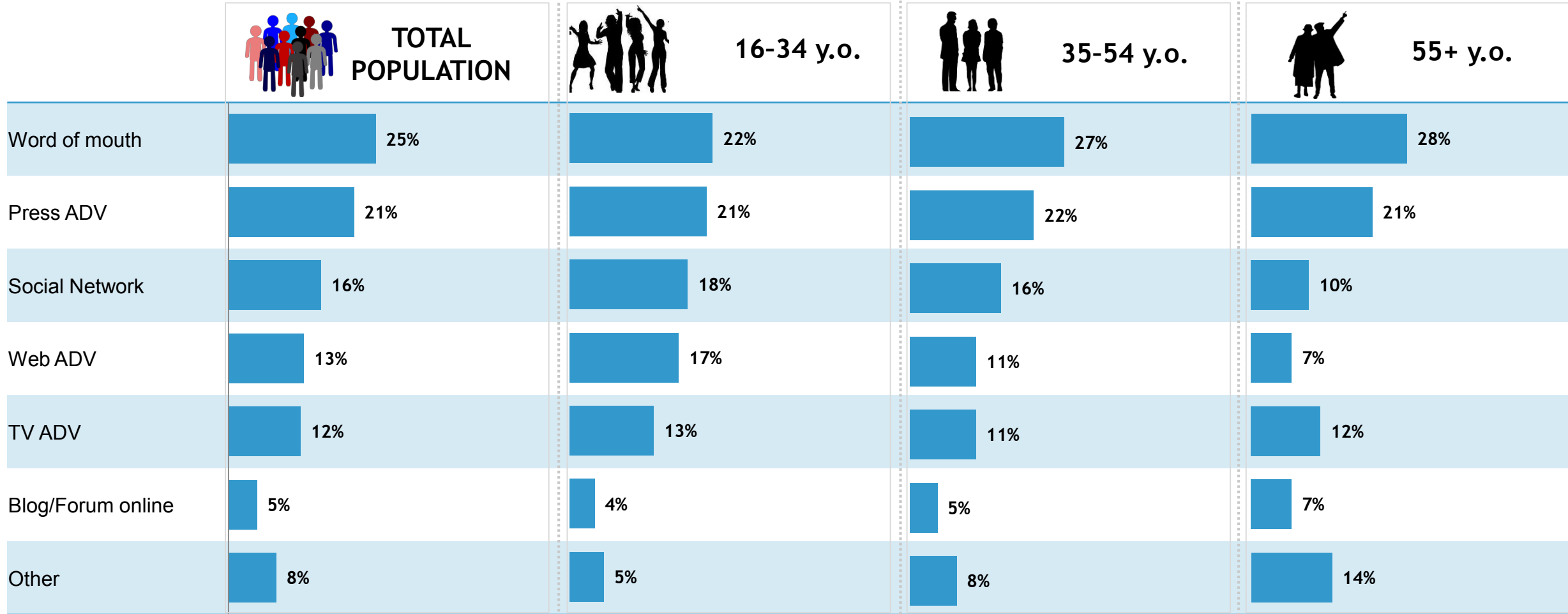
↑/↓ statistically different at 95% confidence level vs previous wave



# Main source of awareness for NatGeo magazine is the word of mouth, followed by press adv.



D14. Come é venuto a conoscenza di National Geographic Magazine?

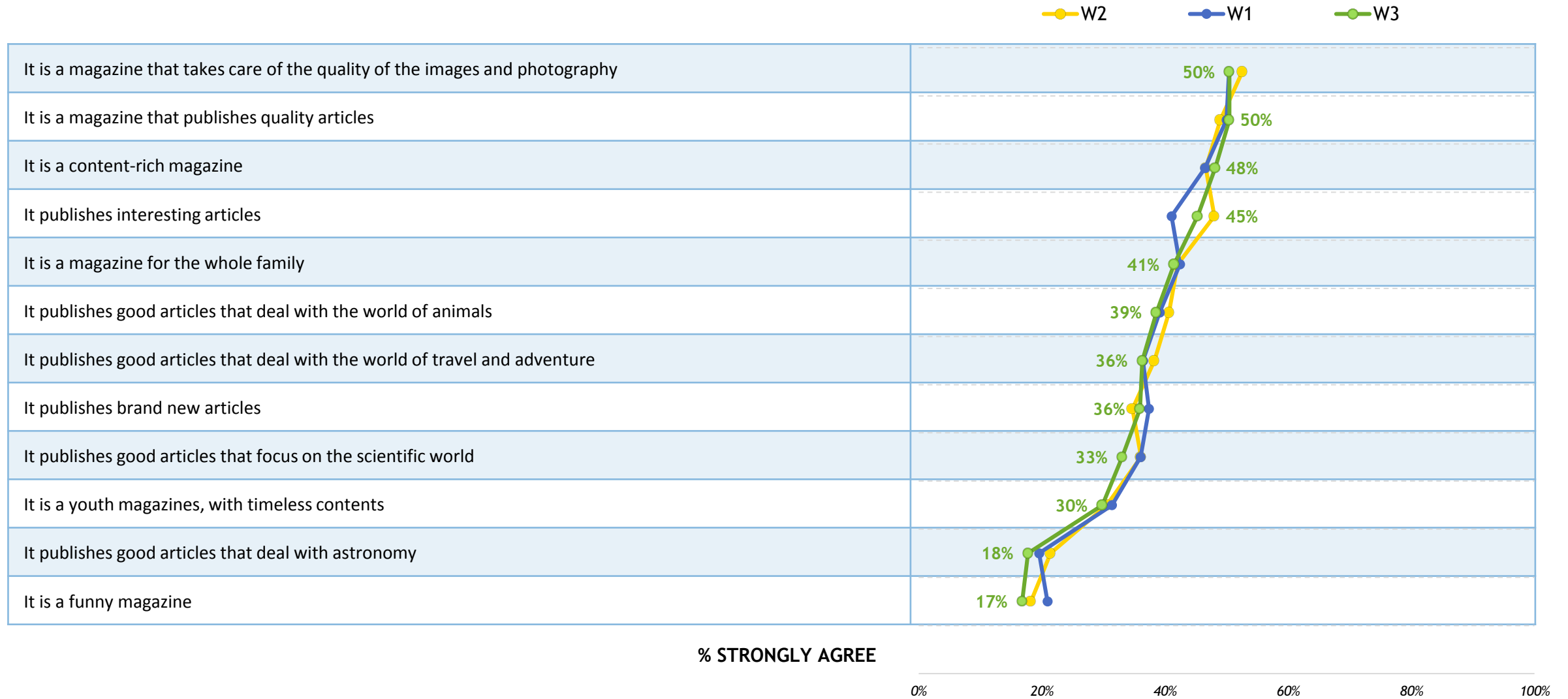


Base: Know National Geographic: 516 respondents - 16-34 y.o.: 209 respondents - 35-54 y.o.: 209 respondents - 55+ y.o.: 98 respondents

# Nat Geo Magazine image relies on quality of the pictures and on the fact that Nat Geo is perceived as quality magazine. No relevant differences between the three waves.



**D15. Di seguito troverá alcune caratteristiche che si riferiscono ai magazine/riviste che trattano di contenuti legati al mondo della natura e della divulgazione scientifica.**



% STRONGLY AGREE

0% 20% 40% 60% 80% 100%

Base: Nat. Geo. Readers- Wave 1 = 504 cases / Wave 2 = 523 cases / Wave 3 = 516 cases

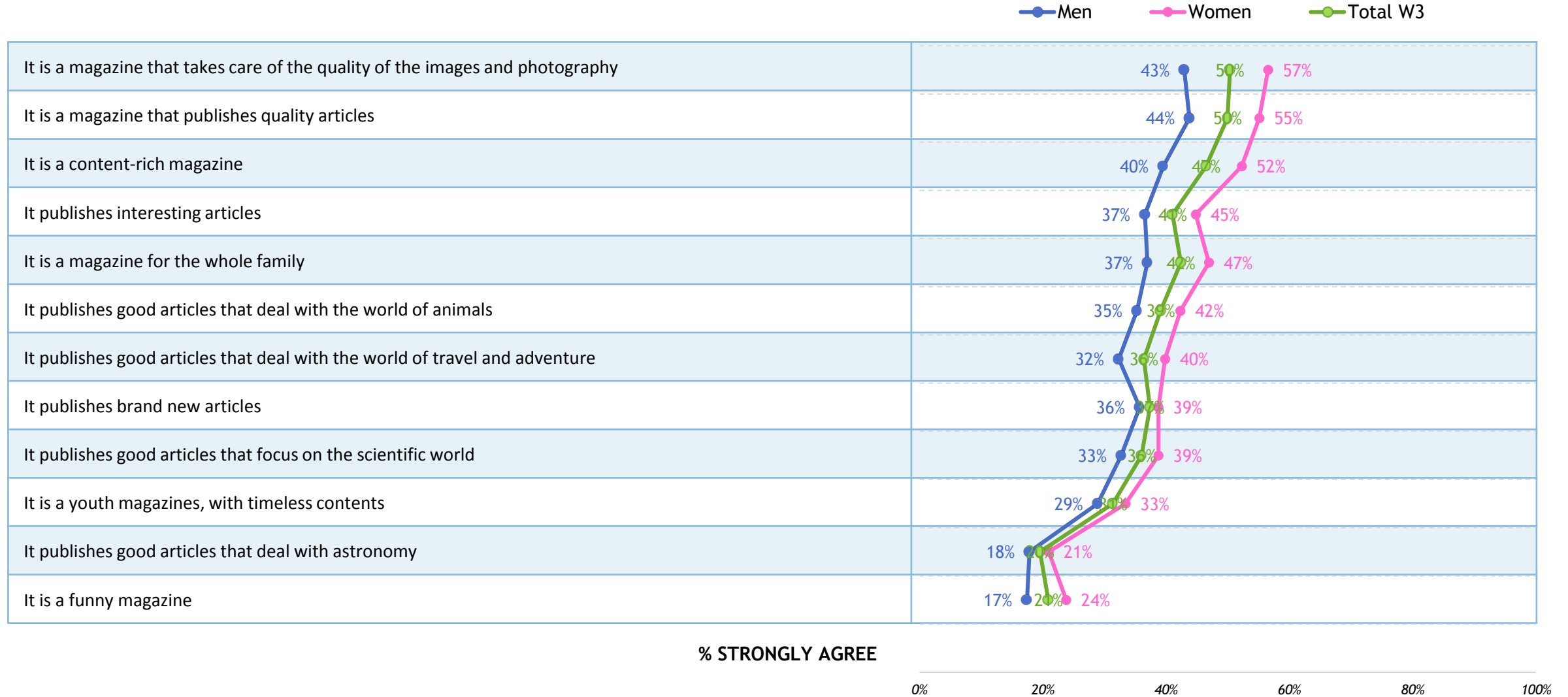
↑/↓ statistically different at 95% confidence level vs previous wave



# Nat Geo Magazine image relies on quality of the pictures and on the fact that Nat Geo is perceived as quality magazine. Women find it a particularly interesting and good quality magazine



**D15. Di seguito troverá alcune caratteristiche che si riferiscono ai magazine/riviste che trattano di contenuti legati al mondo della natura e della divulgazione scientifica.**

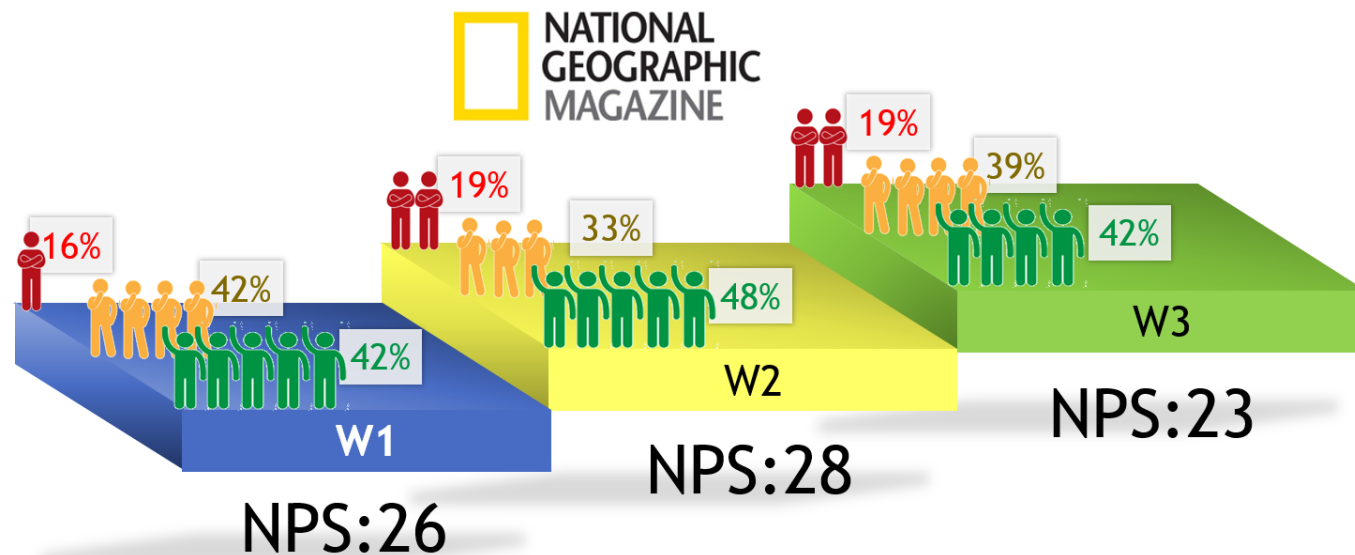


Base: Nat. Geo. Readers -W3 = 516 respondents; Men = 235; Women = 281

# NatGeo magazine's NPS decreases from 28 to 23, in favour of the neutral segment



D16. Consiglierebbe ad amici / parenti / conoscenti National Geographic magazine?



Average	
W2	W3
8.1	7.9

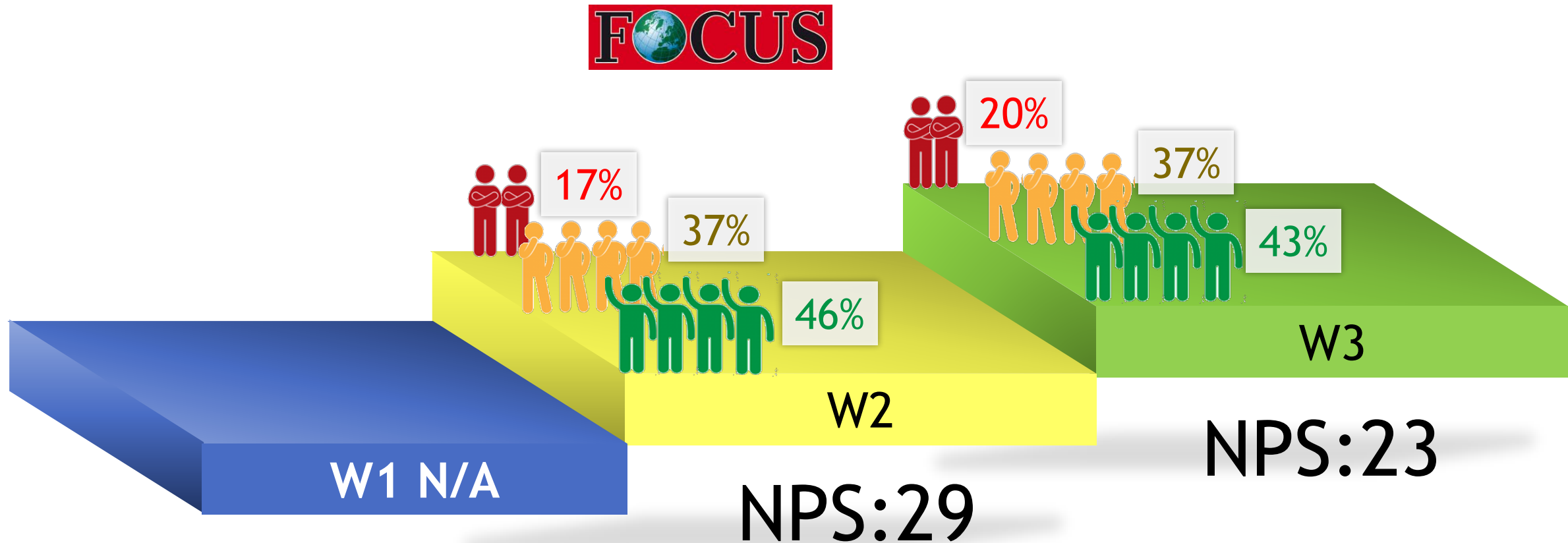
NPS shows a 5% decrease in favour of the neutral segment rather than that of the detractors, which remains the same compared to wave 2.

The NPS decrease has a minimum impact on the average value which is just below 8.0.

# Focus magazine's NPS decreases from 29 to 23, in line with NatGeo's (22)



D16. Consiglierebbe ad amici / parenti / conoscenti Focus magazine?



Base: Discovery. Watchers-W2 = 757 respondents W3 = 654 respondents

# BRAND AWARENESS, IMAGE & NPS



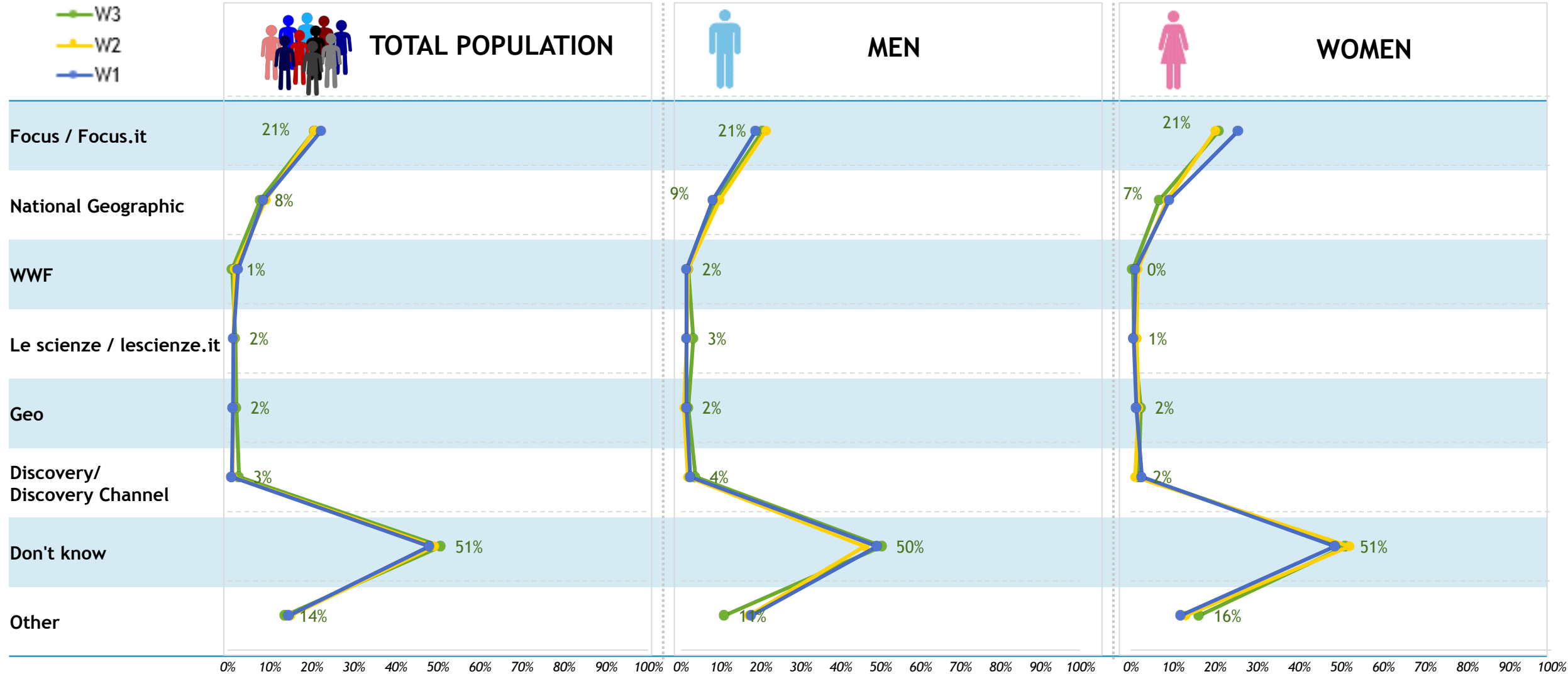
NATIONAL  
GEOGRAPHIC  
ITALIA



# Focus.it Spontaneous Awareness is 13pts higher than Nat Geo.it. NatGeo.it is the second brand mentioned.



D17. Quale sito web che tratta di contenuti legati al mondo della natura e della divulgazione scientifica le viene in mente per primo?



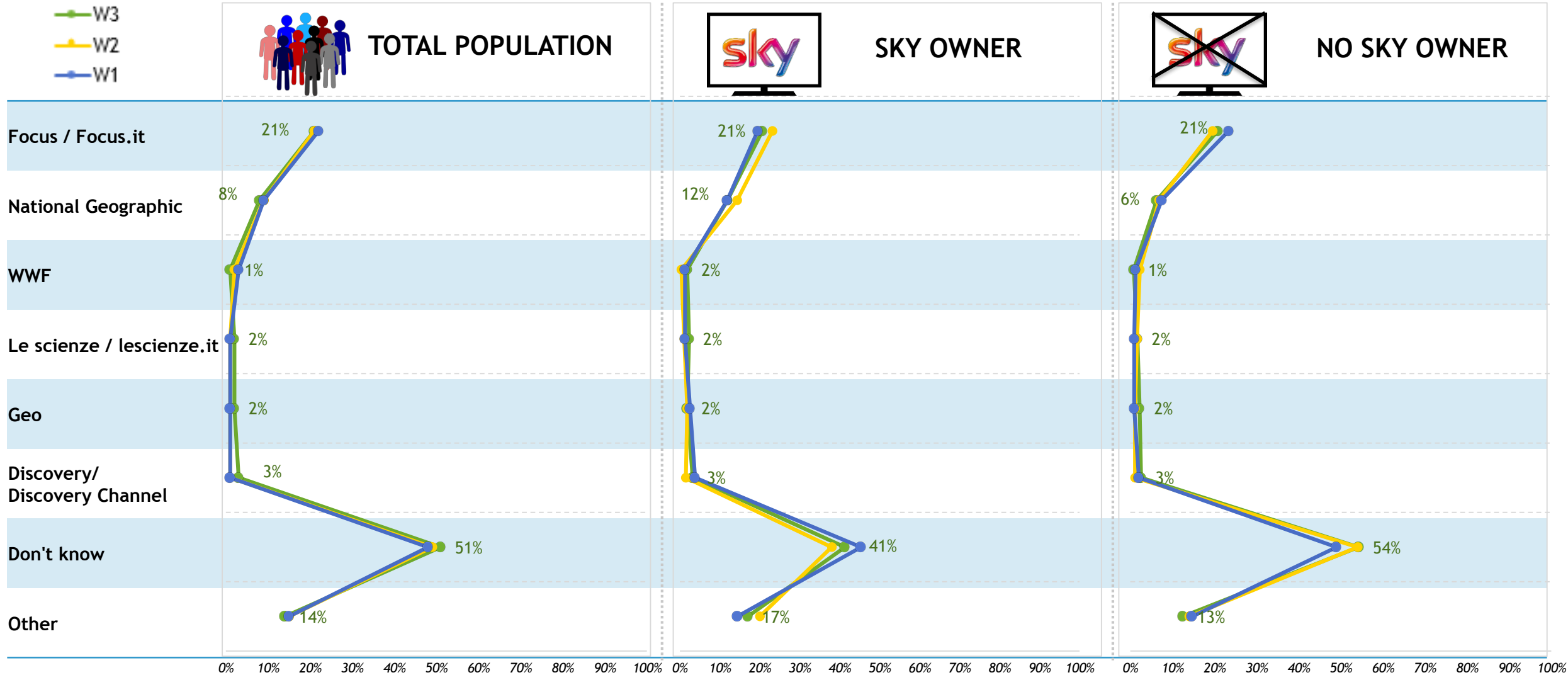
Base: total sample: 810 respondents : Men = 385; Women = 425

↑/↓ statistically different at 95% confidence level vs previous wave

# Focus.it Spontaneous Awareness is 13pts higher than Nat Geo.it. Nat Geo is the second brand mentioned. Nat Geo T.O.M. is higher among Sky owners



D17. Quale sito web che tratta di contenuti legati al mondo della natura e della divulgazione scientifica le viene in mente per primo?



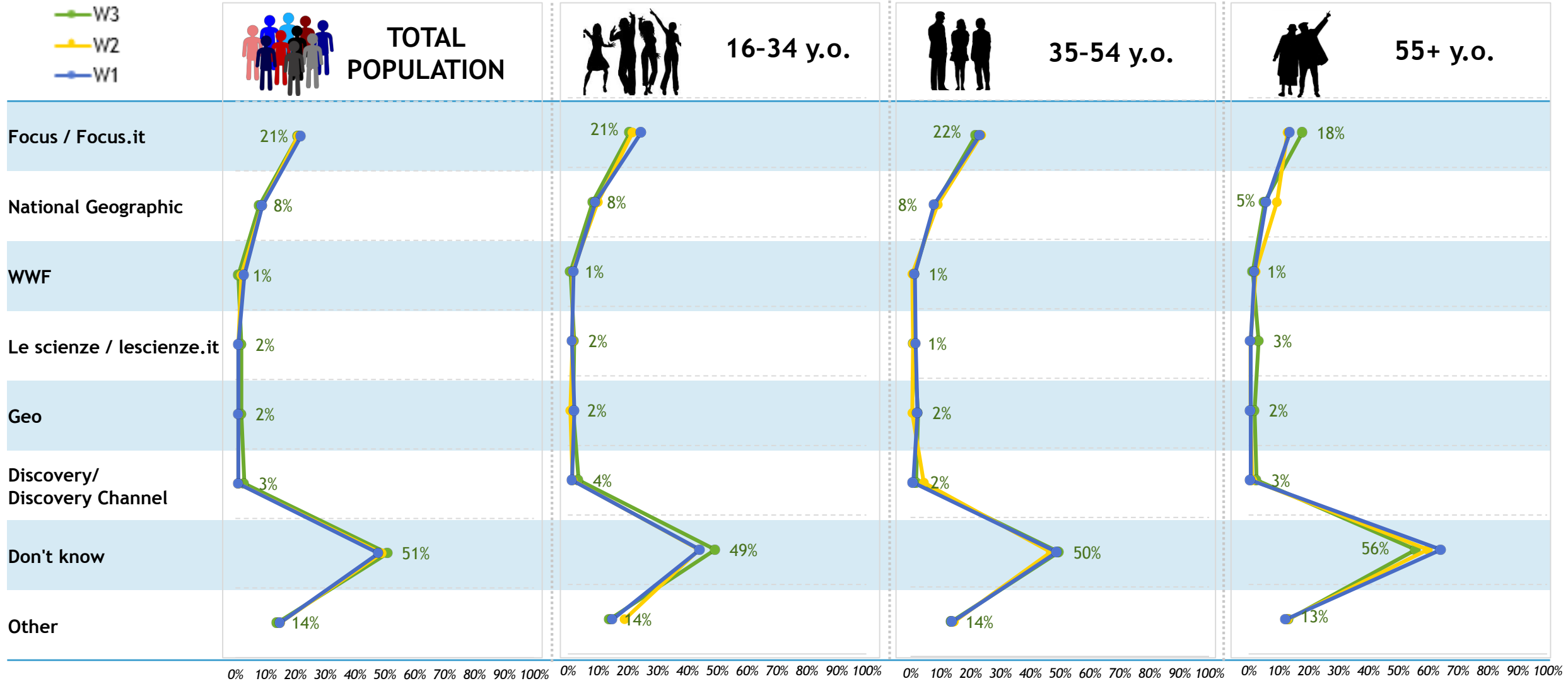
Base: total sample: 810 respondents - Sky Owner 218 respondents - No Sky Owner: 592 respondents

↑/↓ statistically different at 95% confidence level vs previous wave

# Focus.it Spontaneous Awareness is 13pts higher than Nat Geo.it. No significant differences among the segments



D17. Quale sito web che tratta di contenuti legati al mondo della natura e della divulgazione scientifica le viene in mente per primo?



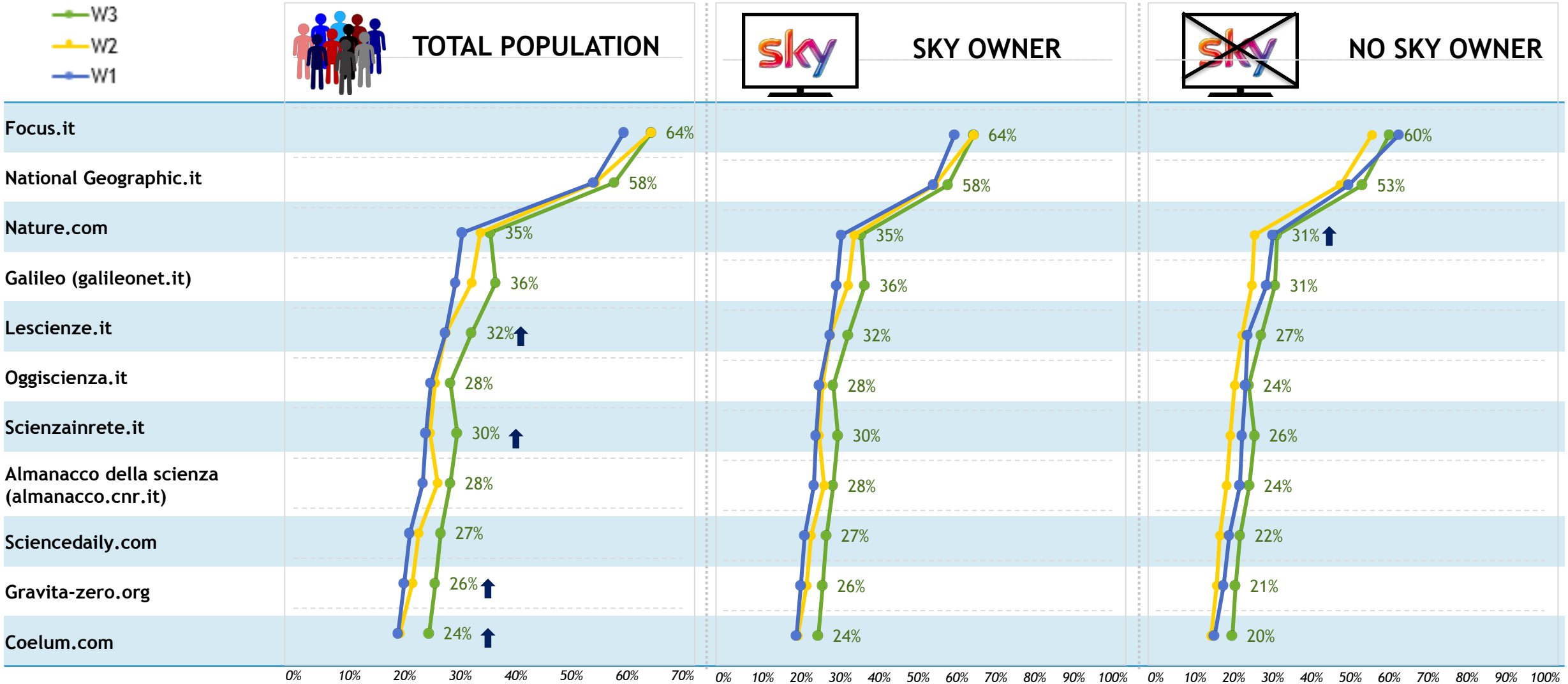
BaseBase: total sample: 810 respondents - 16-34 y.o.: 336 - 35-54 y.o.: 324 - 55+ y.o.: 150

↑/↓ statistically different at 95% confidence level vs previous wave  
**Toluna**  
 In touch with people

# When prompted (consulted the website at least once), Nat Geo keeps the second place, below Focus



D18. Di seguito troverá elencati alcuni siti web che trattano di contenuti legati al mondo della natura e della divulgazione scientifica, quali di questi visita...? (scala 5 punti + non conosco)



Base: total sample: 810 respondents - Sky Owner 218 respondents - No Sky Owner: 592 respondents

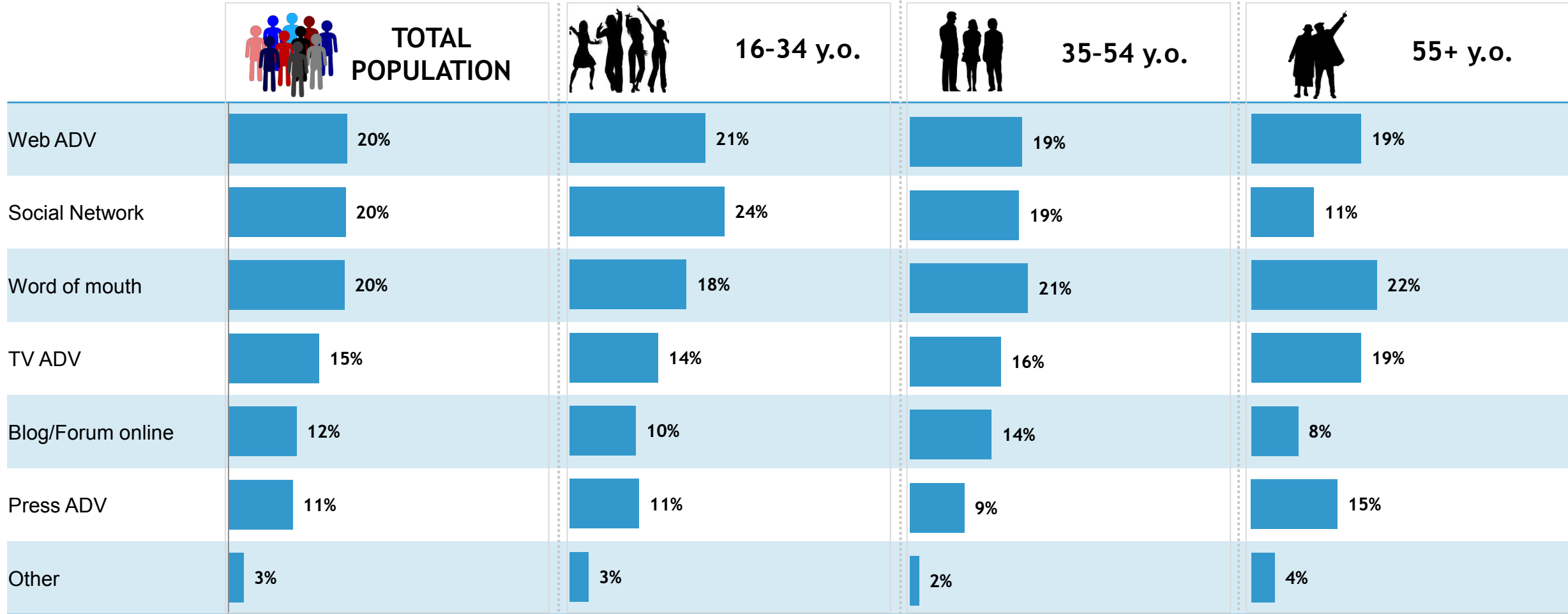
↑/↓ statistically different at 95% confidence level vs previous wave



# Main source of awareness for NatGeo magazine is the web ADV, followed by Social Network.



D19. Come é venuto a conoscenza di National Geographic.it?

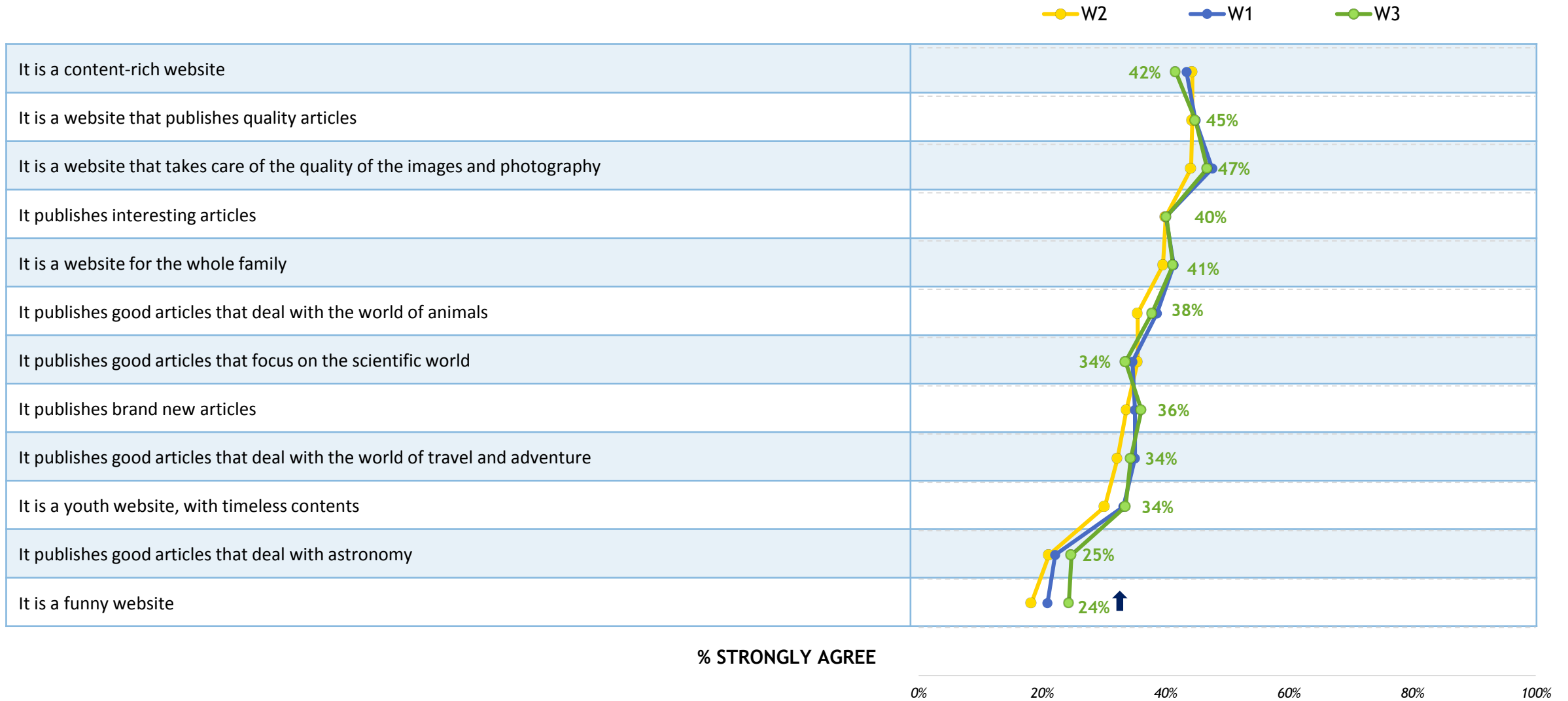


Base: Know National Geographic: 468 respondents - 16-34 y.o.: 206 respondents - 35-54 y.o.: 190 respondents - 55+ y.o.: 72 respondents

# Nat Geo.it image relies on rich contents and on the fact that it is perceived as quality website. No relevant differences between the two waves



D20. Di seguito troverá alcune caratteristiche che si riferiscono ai siti che trattano di contenuti legati al mondo della natura e della divulgazione scientifica. Per ognuna di esse mi dovrà dire se a suo avviso describe National Geographic.it...



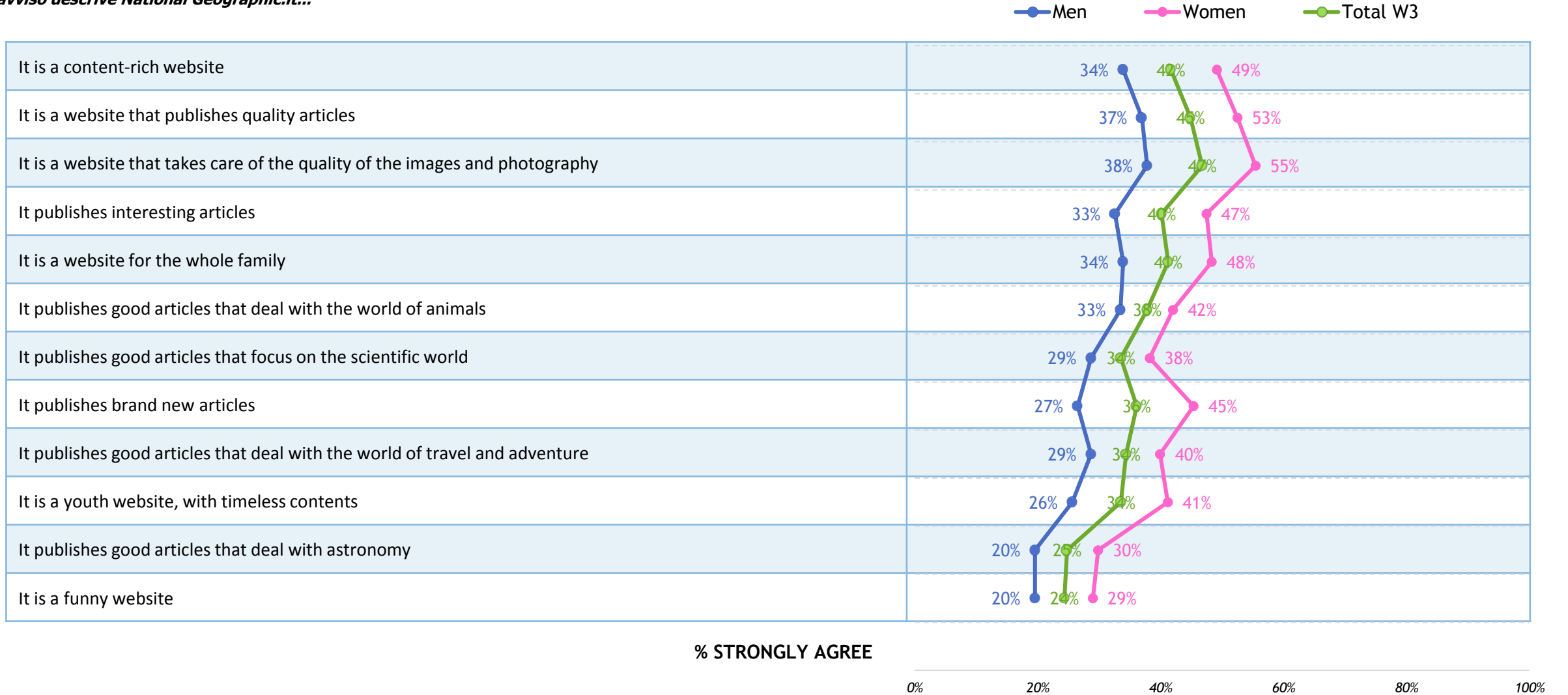
Base: Nat. Geo. Users - Wave 1 = 479 cases / Wave 2 = 486 cases / Wave 3 = 468 cases

↑/↓ statistically different at 95% confidence level vs previous wave

# Nat Geo Magazine image relies on quality of the pictures and on the fact that it is perceived as quality magazine. Women find it a particularly interesting and good quality magazine



**D20. Di seguito troverá alcune caratteristiche che si riferiscono ai siti che trattano di contenuti legati al mondo della natura e della divulgazione scientifica. Per ognuna di esse mi dovrà dire se a suo avviso descrive National Geographic.it...**

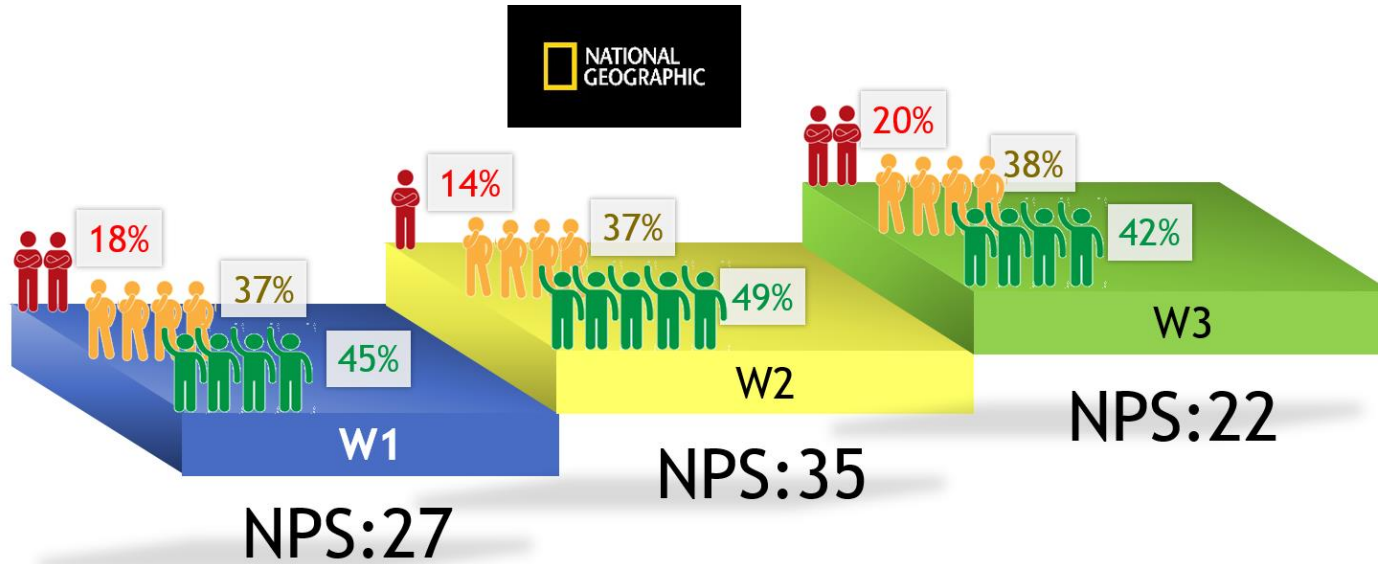


Base: Nat. Geo. Readers -W3 = 468 respondents; Men = 230; Women = 238

# NatGeo website's NPS is still positive even if it decreases from 35 to 22



D11. Consiglierebbe ad amici / parenti / conoscenti National Geographic.it?



Average	
W2	W3
8.2	7.8

A 6% decrease of promoters in favour of the detractors has an impact on the overall NPS score.

The same outcome is reported for Focus.it, and this is to say that the NPS is more likely to change when it is expressed on a fast changing and constantly updating medium such as the internet compared to other medium.

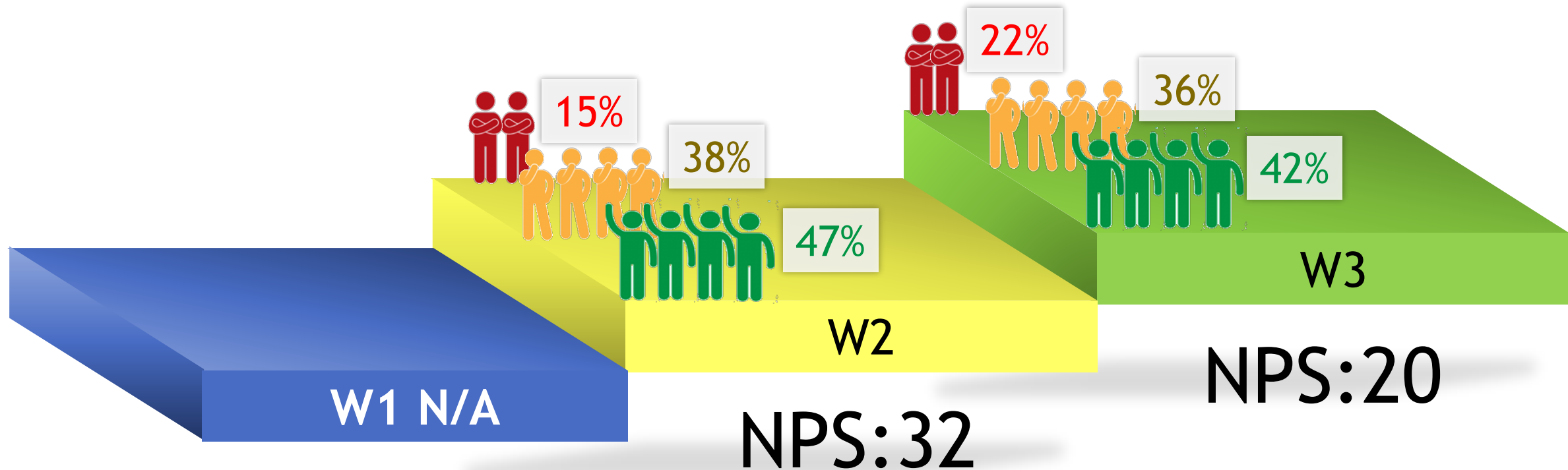
Base: Nat. Geo. Users - Wave 1 = 479 cases / Wave 2 = 486 cases / Wave 3 = 468 cases

# Focus.it website's NPS is still positive even if it decreases from 32 to 20



D11. Consiglierebbe ad amici / parenti / conoscenti Focus.it?

## Focus.it



Base: Discovery. Watchers-W2 = 536 respondents W3 = 522 respondents

Thank you!

