

# AD NATION 2023

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think<sup>tv</sup>





Profile – US and THEM

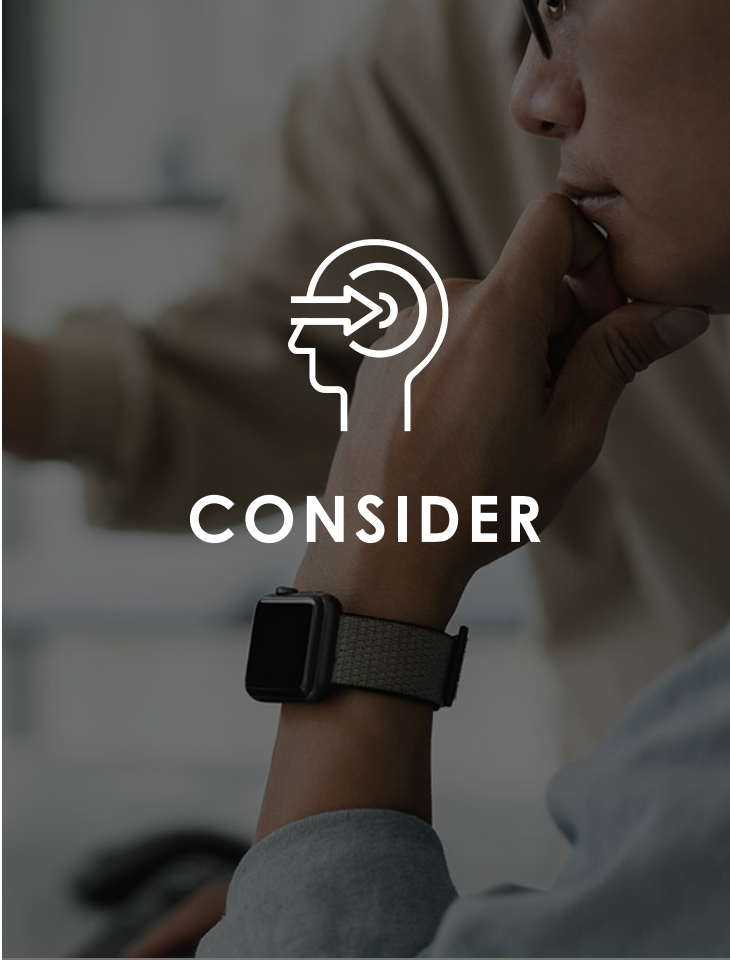


THEM – What are they doing?



US – What are we doing and what do we think they are doing?

# Our Brief





# A Big

**THANK YOU**



# PROFILE US & THEM



# Profile – US and THEM



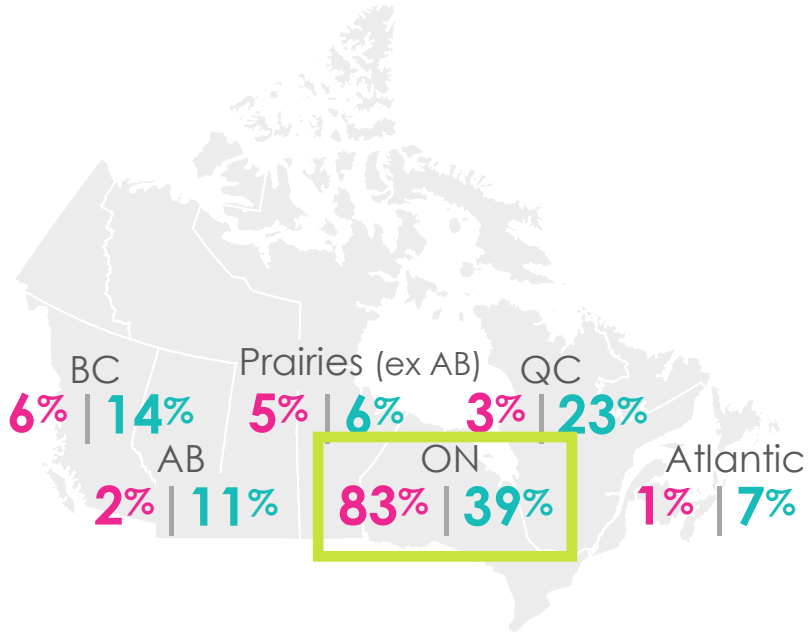
18-34  
30% | 27%



35-54  
53% | 32%



55+  
17% | 41%



52%  
Client side organization

14%  
Advertising

9%  
Creative agency

9%  
Publisher\*

10%  
Media agency

6%  
Digital agency

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

# Profile – US and THEM

	SMARTPHONE	TV STREAMING DEVICE	SMART SPEAKERS	SMART TV
Us	93%	65%	49%	68%
Them	81%	30%	22%	54%

	NETFLIX	AMAZON PRIME	APPLE TV	DISNEY+
Us	90%	77%	42%	51%
Them	52%	43%	8%	26%







# Two Summary Points

1

TV remains the top media choice for Canadians

2

TV advertising is seen as the most compelling form of advertising

#1

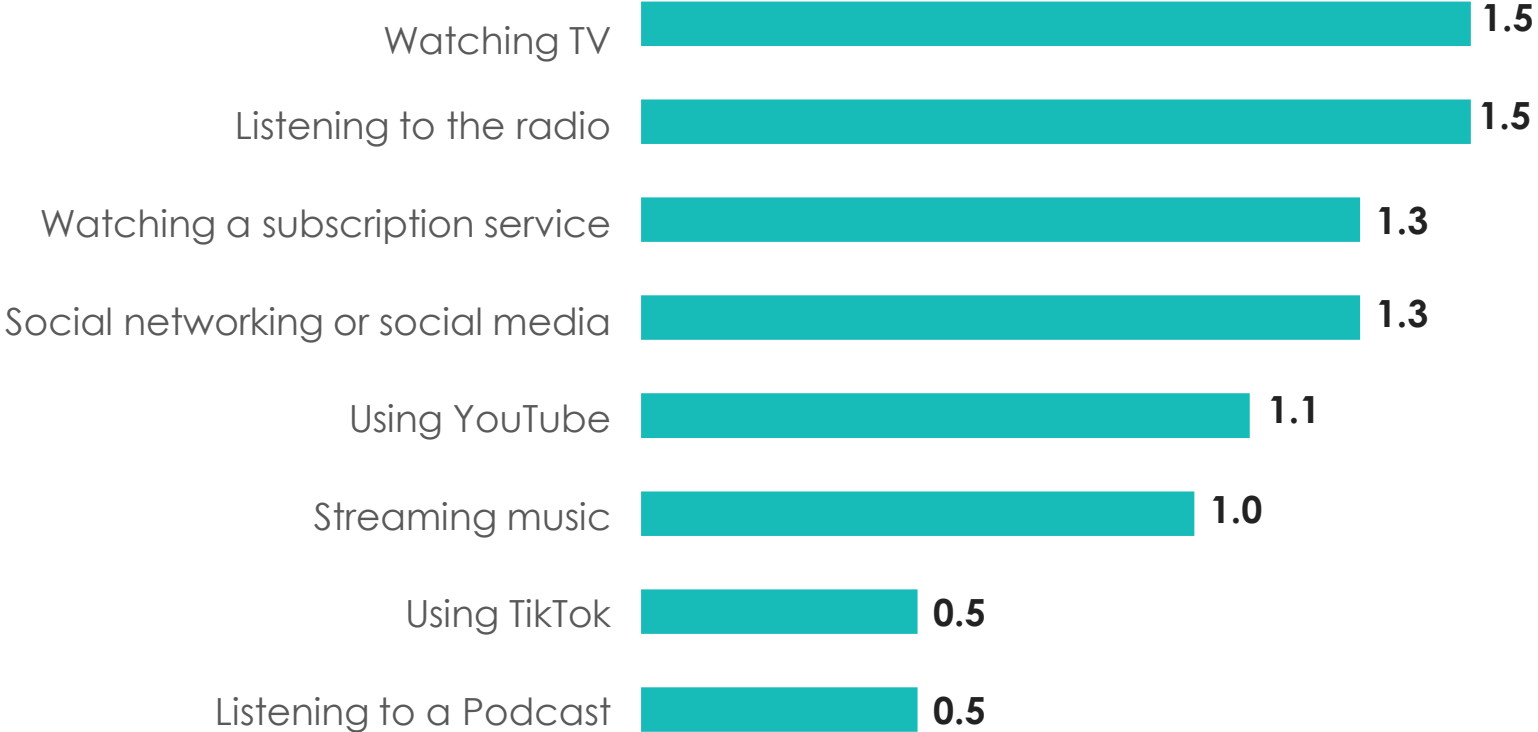
TV remains the  
top media  
choice for  
Canadians

# TV remains a top medium, despite growth in 'new' media like TikTok and podcasts

Daily Time Spent on Different Media Types (self-reported)

## THEM

■ 2023



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

Watching TV= watching regular TV and Streaming TV



# In 2023, Canadians are spending 20% more time consuming various forms of media

8.7

11.5

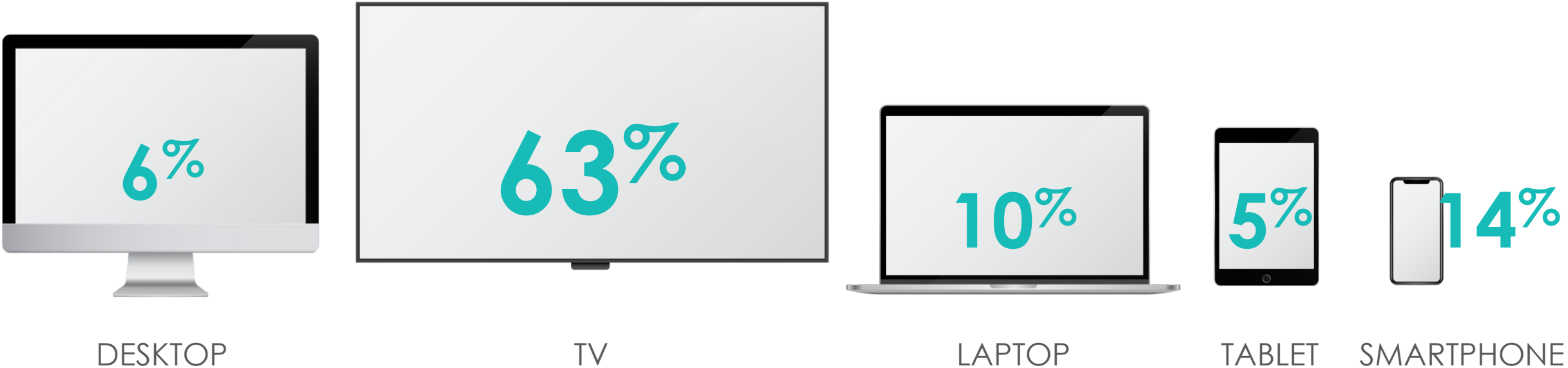
2017

2023

# TV remains the dominant way that Canadians watch TV/movies

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

THEM



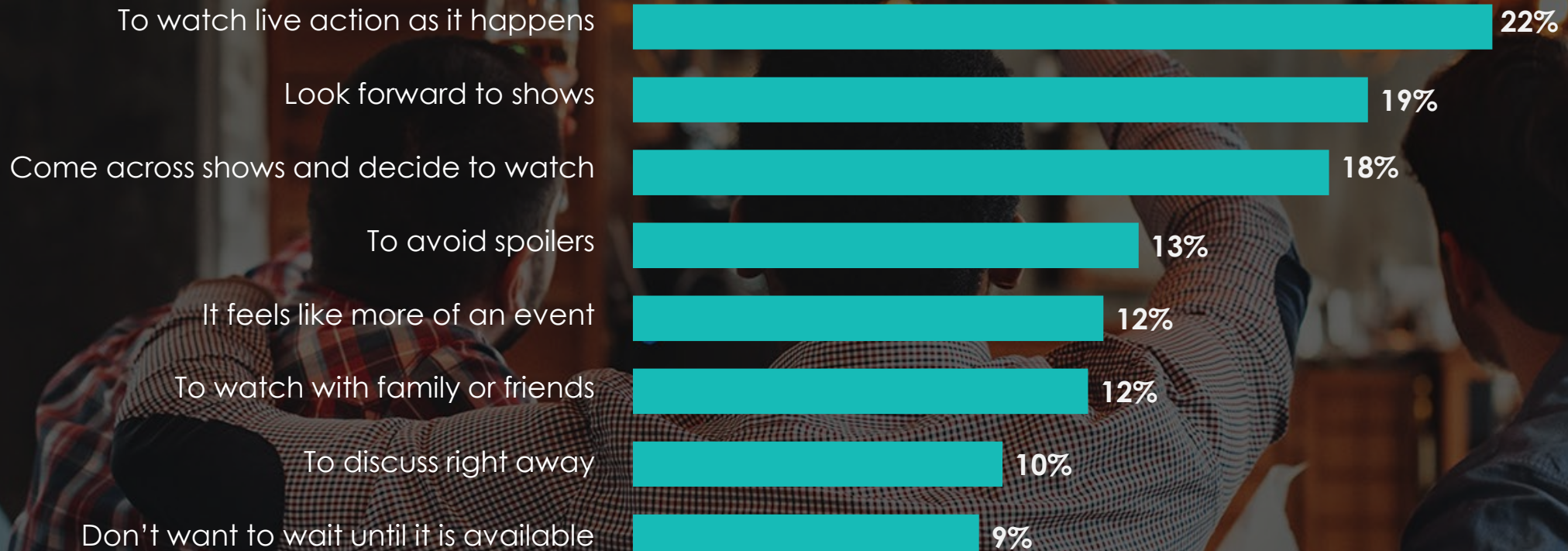
Of the time you spend watching TV shows or movies (excluding DVDs or shows from a subscription on-demand service like Netflix or Amazon), what percentage of that time is spent watching on a...?

# Live TV offers an opportunity to see it as it happens but also to anticipate and look forward to something

Why do People Watch Live TV?

## THEM

2023



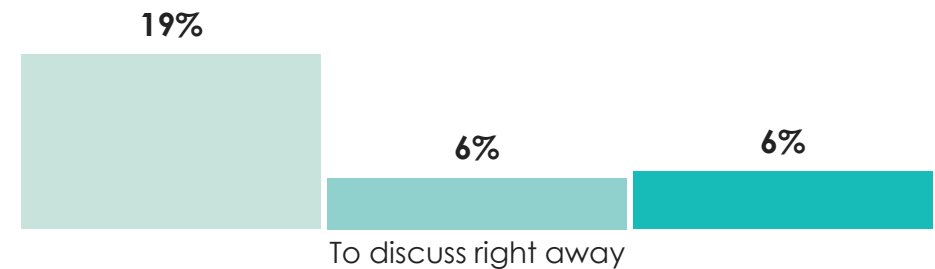
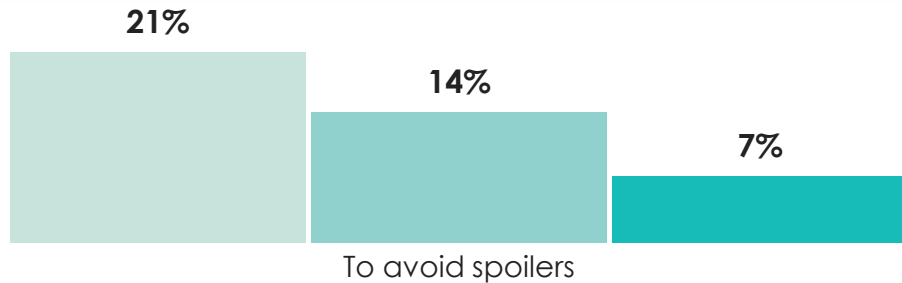
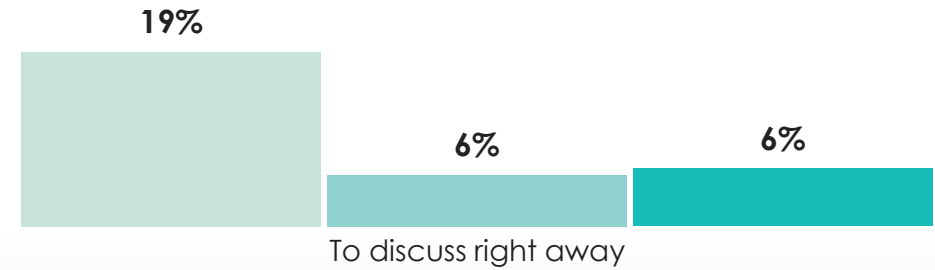
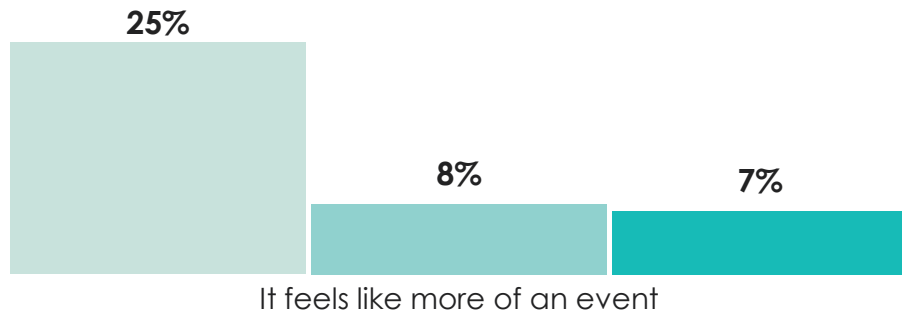
Why do you watch any TV shows live at the time they are broadcast rather than watch later recorded or via catch up/ on demand?

# TV is relevant to younger audiences when it is an 'event' that they can discuss right away

Why do People Watch Live TV?

## THEM

18-34 35-54 55+



Young adults = 18-34 years of age  
Why do you watch any TV shows live at the time they are broadcast rather than watch later recorded or via catch up/ on-demand?

# Multi-screening: viewers more focused than we think

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

# 64%

THEM

18-34

51%

35-54

57%

55+

80%

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



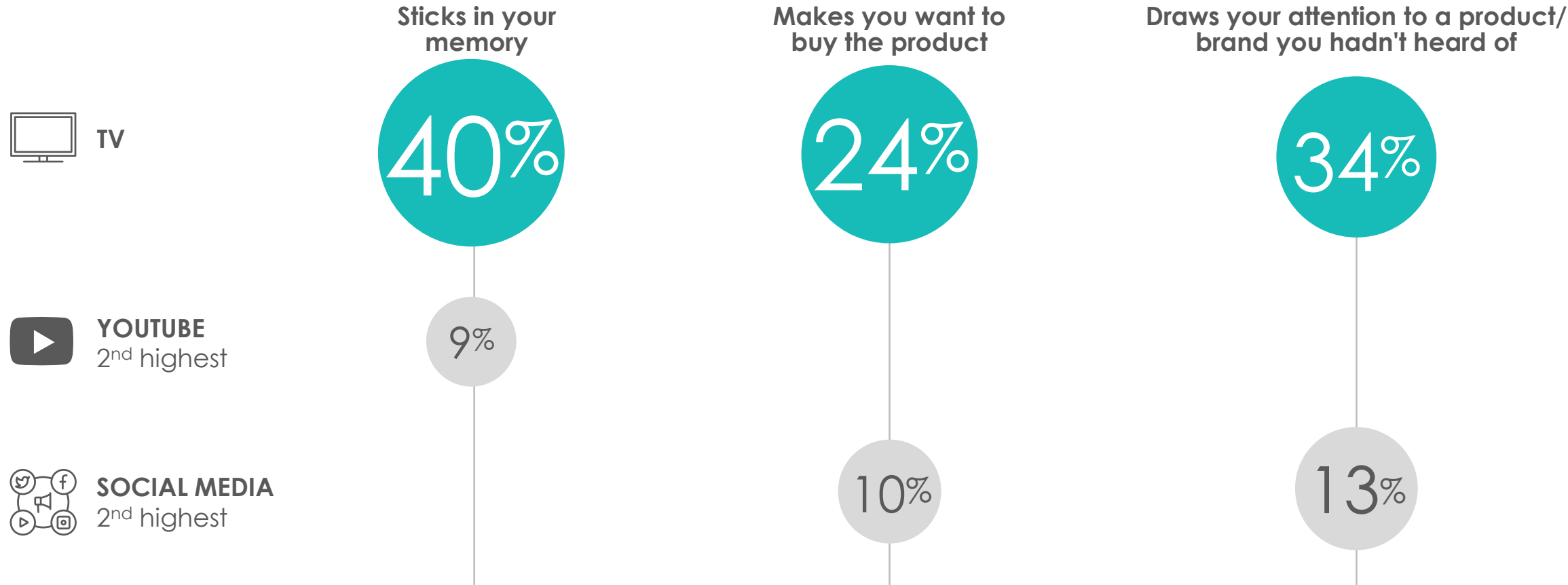
#2

TV advertising is  
seen as the most  
compelling form  
of advertising

# The benefit of TV to advertisers – it sticks and creates demand

Media Sources on which you find advertising that...

## THEM

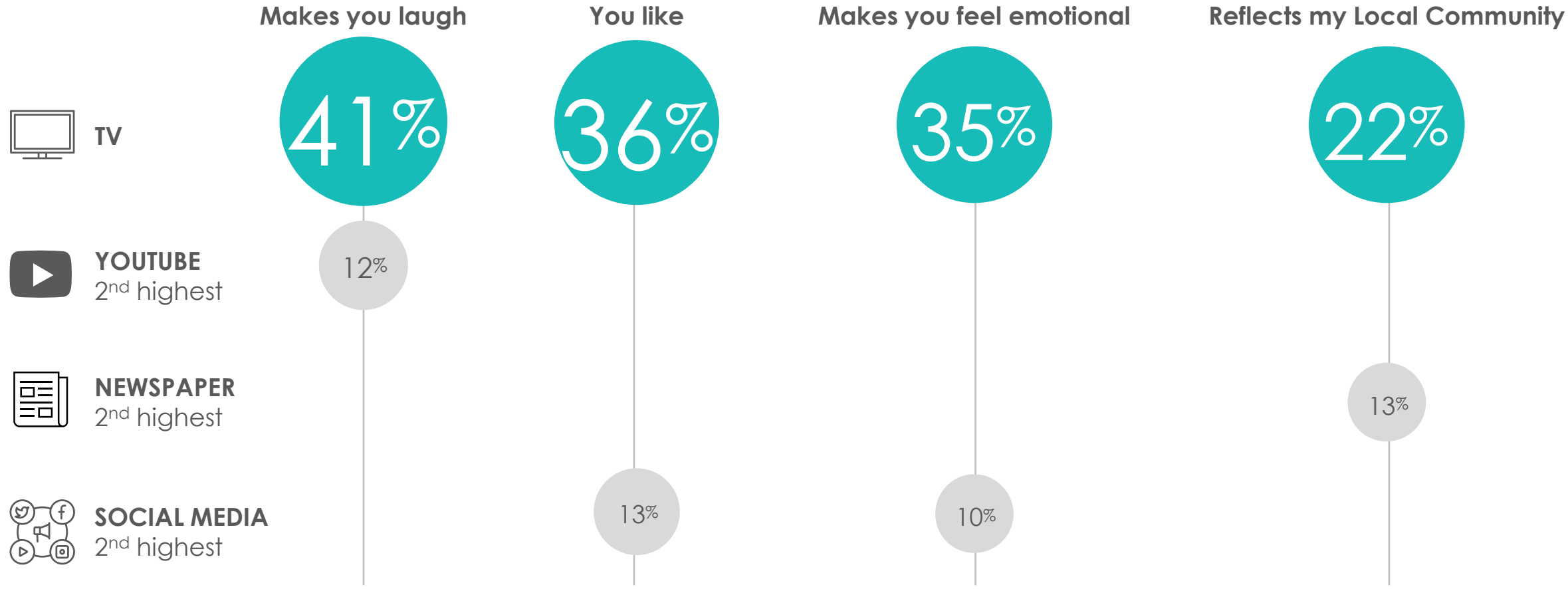


In which of the following media are you most likely to find advertising that...?

# TV remains a powerful and emotional platform

Media Sources on which You Find Advertising that...

## THEM



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

# And while distrust of advertising on any media is still high, TV clearly leads all other media

Media Sources on which You Find Advertising that...

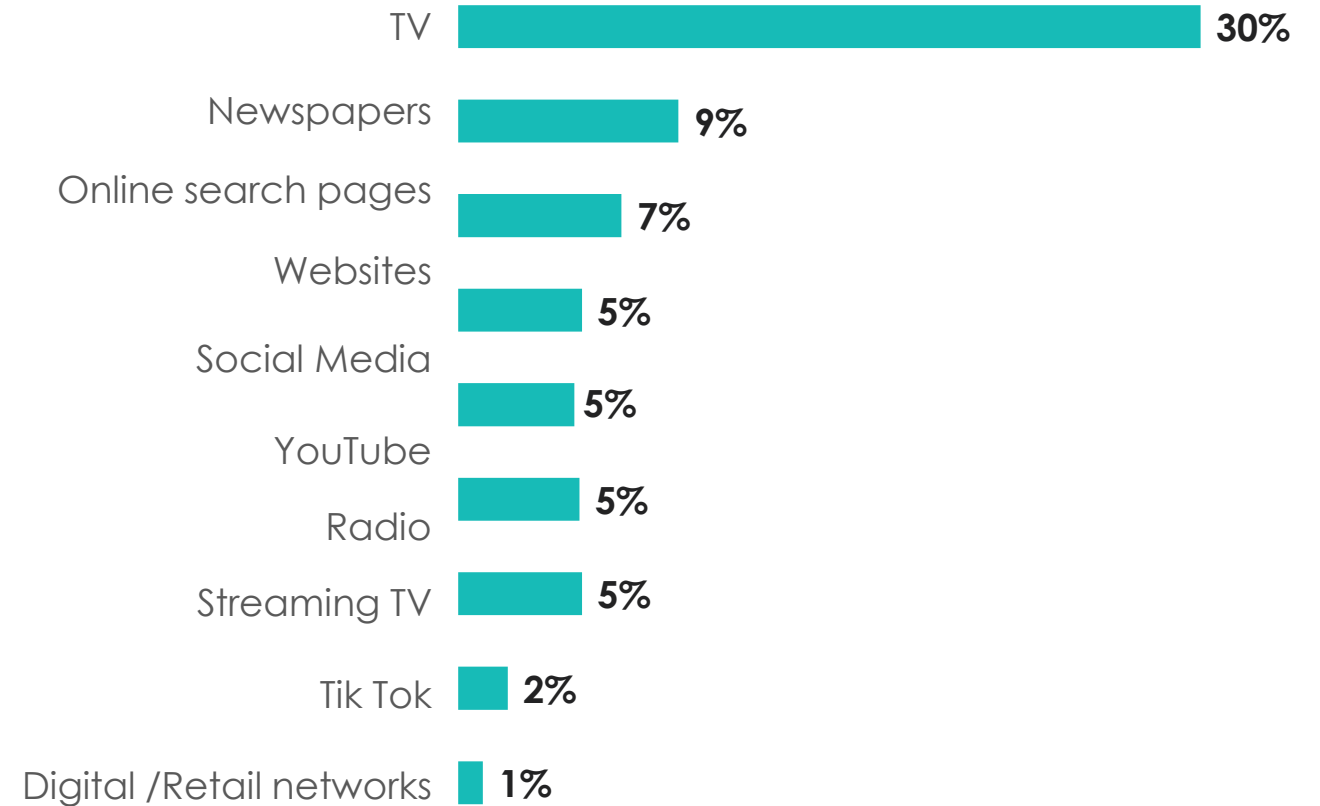
**DON'T TRUST ANY ADVERTISING – ANY FORM OF MEDIA**

**29%**  
2020

**31%**  
2023

In which of the following media are you most likely to find advertising that ...?  
TV= watching regular TV and Streaming TV

**YOU TRUST**



# Looking Forward

- TV is, and will remain, a powerful force for the foreseeable future.
- TV as an advertising medium continues to lead the way - creates laughter, engenders emotion, sticks in the memory of the public and draws attention to brands.
- TV is relevant to younger audiences when it is an 'event' that they can discuss right away.
- There is clearly an opportunity for advertising across ALL media channels in Canada to address the public's lack of trust.



# Two summary points and one consideration

1

Industry media habits/ practices are markedly different from that of the public.

2

Industry perceptions of what the public thinks and does from a media consumption perspective are different.

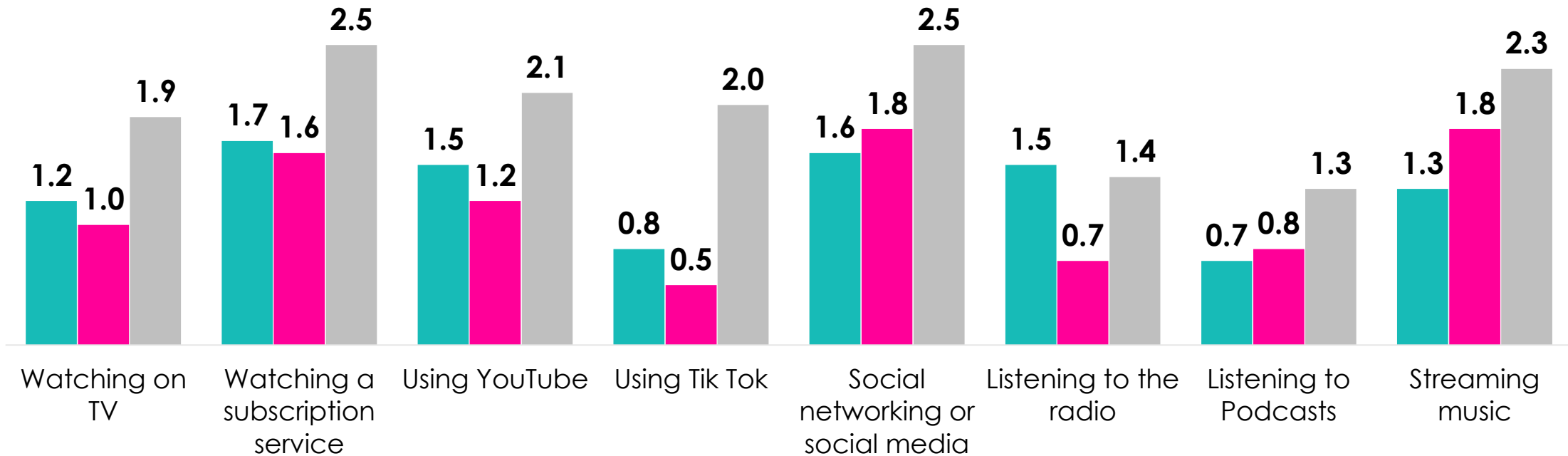
?

Does this impact our judgment?

# Our media behaviour is different...and our perceptions of the Canadian public are skewed

## DAILY TIME SPENT ON DIFFERENT MEDIA TYPES (SELF REPORTED) THEM 18-54

THEM US INDUSTRY'S ESTIMATE OF THE GENERAL PUBLIC

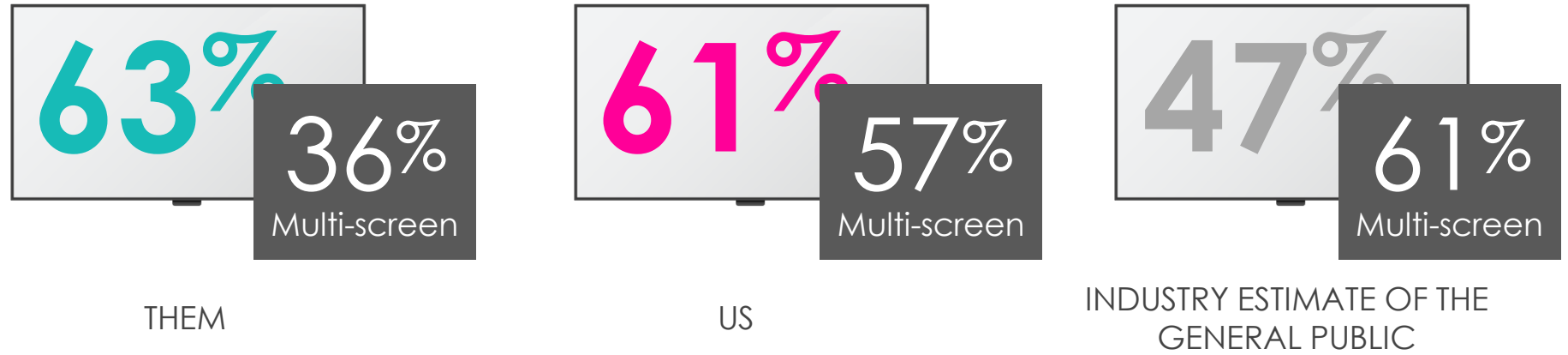


In an average day, approximately how much time do you spend doing the following activities?  
 What percentage of time do you think that **the average adult Canadian** spends doing the following activities in an **average day**?



# We underestimate how much time the public spends on big screens... And we over estimate the extent the public uses multi-screens

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



Device	THEM	US	INDUSTRY ESTIMATE OF THE GENERAL PUBLIC
Desktop	6%	4%	4%
Laptop	10%	12%	14%
Tablet	5%	4%	9%
Smartphone	14%	17%	22%

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

# Industry – feels more strongly about watching live TV

## WHY DO PEOPLE WATCH LIVE TV?

THEM US

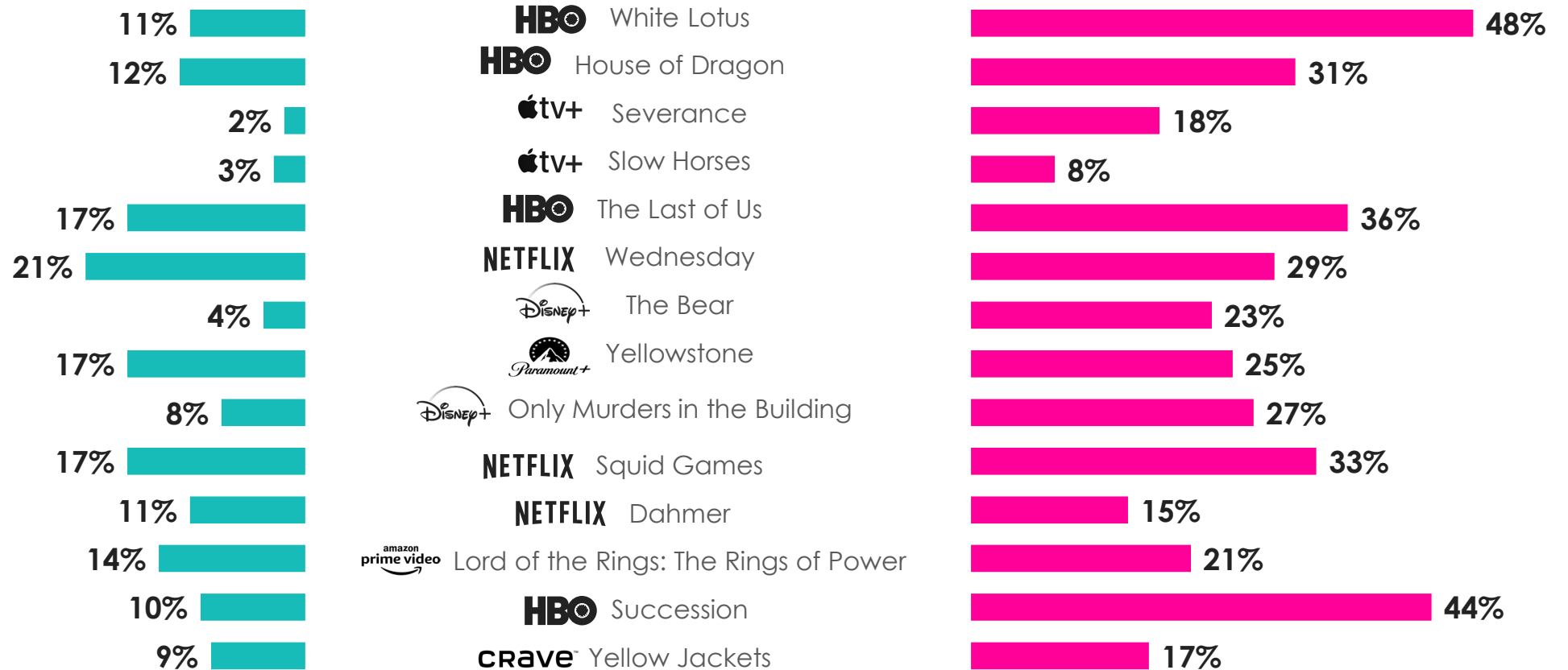


Why do you watch any TV shows live at the time they are broadcast rather than watch later recorded or via catch up/ on demand?

# Industry professionals are far more likely to be engaged with what's new

AT LEAST ONE EPISODE WATCHED IN P6M

THEM US

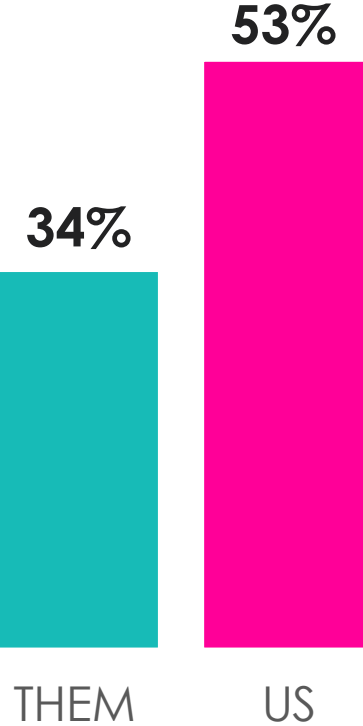


Which of the following shows have you watched at least one episode of in the last 6 months?

# The irony...industry professionals seem to want to avoid their own work!

You would be willing to pay extra to avoid seeing ads while streaming shows on your device

THEM US



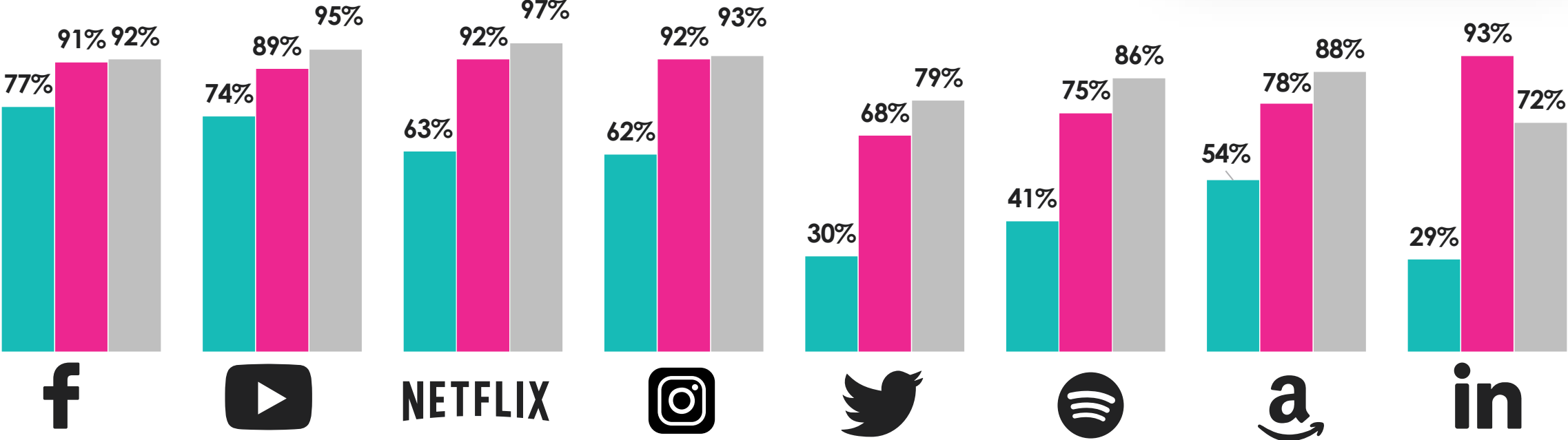
How many AD supported streaming services (e.g. Pluto TV, CBC News Explore) do you access at least once a month?

# Canadians 18-54 are not nearly as active on social media apps as the industry thinks they are

APPS USED IN THE LAST MONTH **AMONG 18-54**

Avg gap = 34 pts!

THEM US INDUSTRY'S ESTIMATE OF THE GENERAL PUBLIC



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

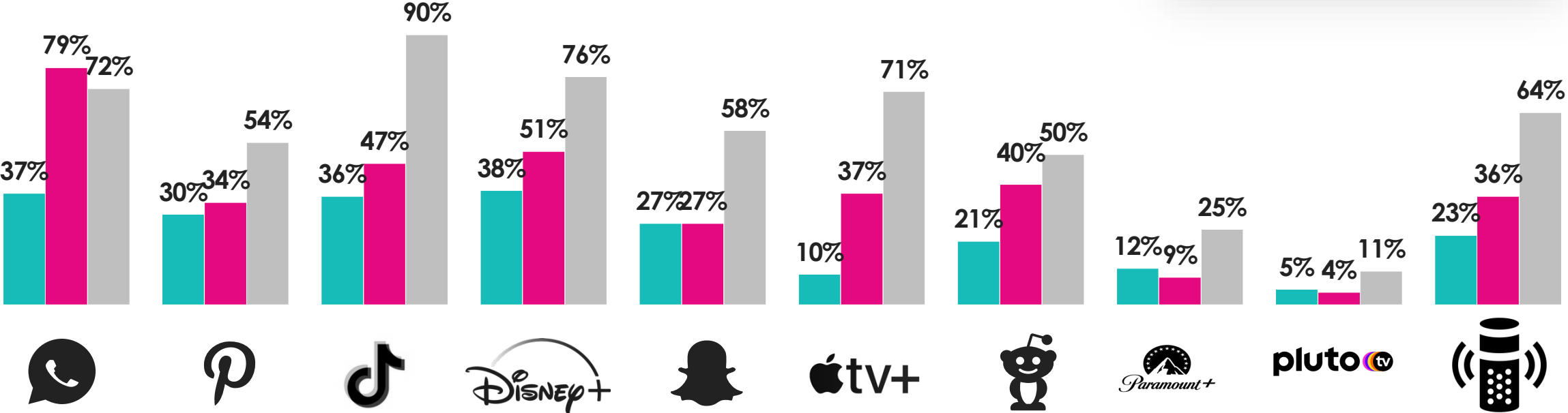


# Canadians 18-54 are not nearly as active on social media apps as the industry thinks they are

## APPS USED IN THE LAST MONTH **AMONG 18-54**

Avg gap = 33 pts!

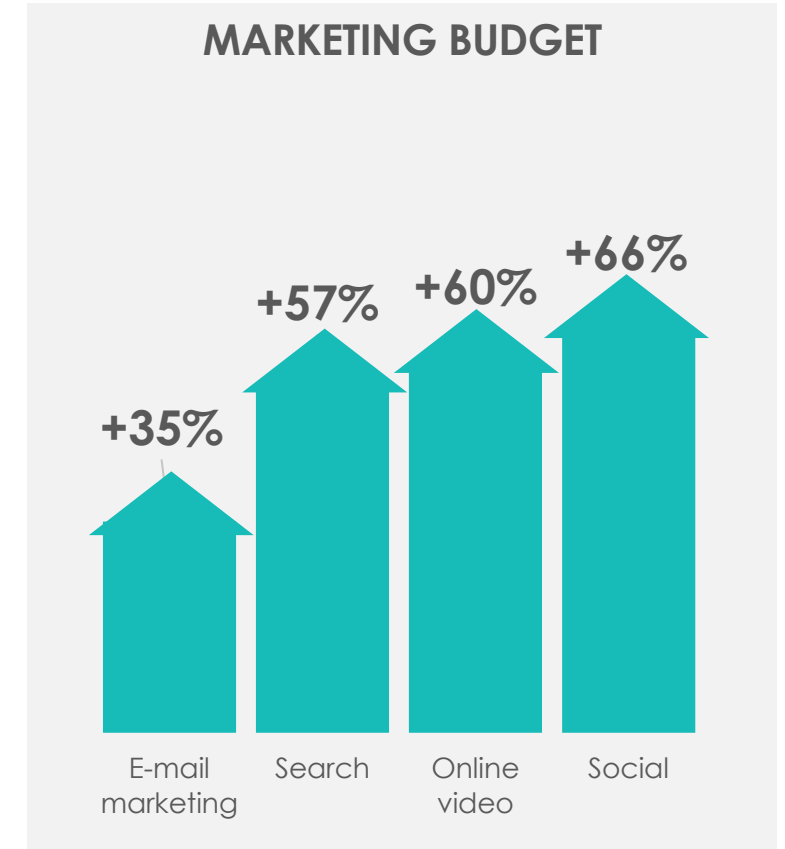
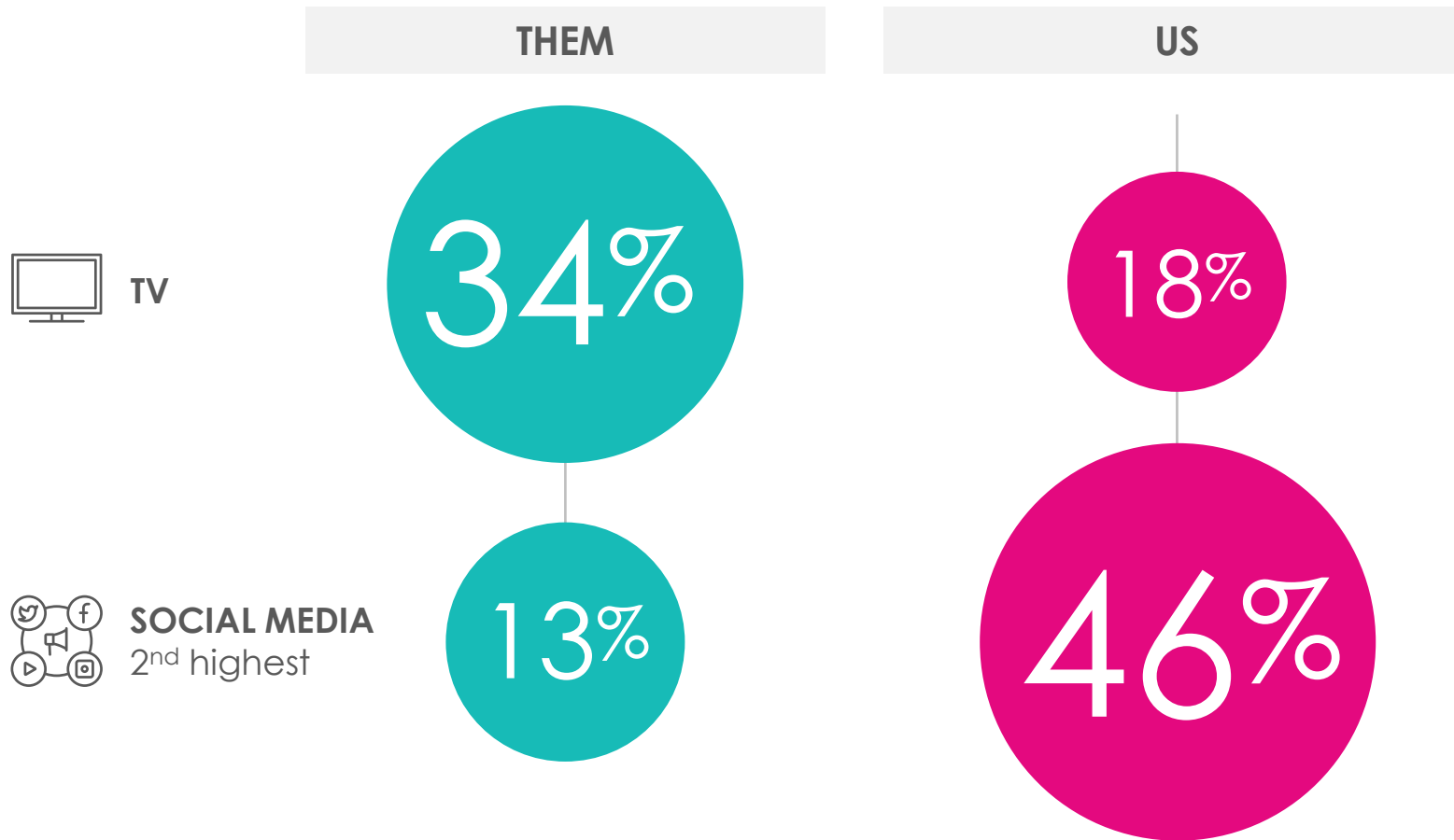
THEM US INDUSTRY'S ESTIMATE OF THE GENERAL PUBLIC



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

# Our industry perception about the power of TV for 'them' is sometimes out of Synch

DRAWS YOUR ATTENTION TO A PRODUCT/BRAND YOU HADN'T HEARD OF



Source: 2022 Ipsos Digital Pulse Study

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

# Our industry perception about the power of TV for 'them' is sometimes out of synch

MAKES YOU WANT TO BUY THE PRODUCT

THEM

US



24%

12%



10%

37%

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

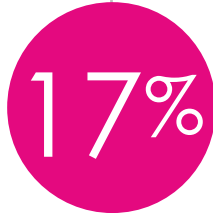


# Our industry perception about the power of TV for 'them' is sometimes out of synch

REFLECTS MY LOCAL COMMUNITY

THEM

US



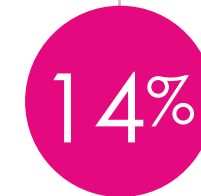
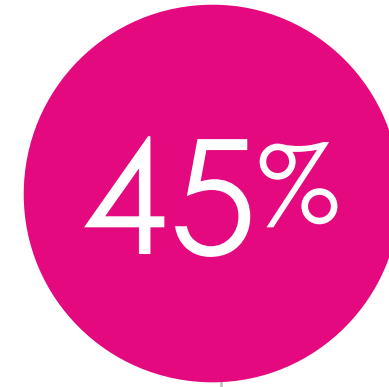
In which of the following media are you **most** likely to find advertising that ...?

# Despite the fact that we still believe consumers think TV advertising is 'memorable'

## STICKS IN YOUR MEMORY

THEM

US



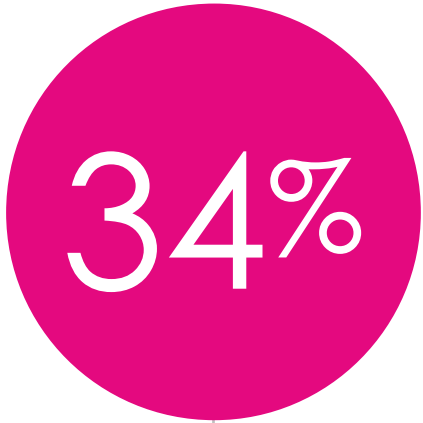
In which of the following media are you **most** likely to find advertising that ...?

# And that we all agree we 'like' TV advertising most

## YOU LIKE

THEM

US



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

# Probably because it makes us laugh the most

## MAKES YOU LAUGH

THEM

US



41%

37%



12%



20%

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

# And is most likely to make us feel emotional

## MAKES YOU FEEL EMOTIONAL

THEM

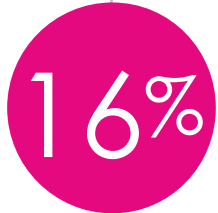
US



TV



**SOCIAL MEDIA**  
2<sup>nd</sup> highest



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

# Looking Forward

- US - we overestimate the public's digital content media consumption, and our budgetary decisions reflect this.
- US and THEM - love live TV – and in fact the industry feels even more strongly about it than the public do!
- US - need to be adjusting our marketing and media plans with the Canadian public in mind.... Perhaps some level setting and training.
- US and THEM – belief that one is 'most likely' (vis-à-vis other media) to find advertising that makes brands/products more recognizable, and that stick in memory, on TV.

## Similarity in a Changing Circumstance

In 2020 **OUR** estimation of what **THEY** do was similar to **OUR** estimation in **2017**.

In 2023 **OUR** estimation of what **THEY** do was similar to **OUR** estimation in **2020**.

**WE** continue to overestimate or understate what **THEY** are doing.

**Time to consider – is this impacting OUR media buying recommendations and do we need a level set?**



**Steve Levy**

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