

MIND THE (MEDIA) GAP

AD NATION 2026 – Canadian and
Industry Perceptions of Advertising
& Media

September 2026

think^{tv}

MIND THE GAP



Agenda

20

Why we did the research – objectives

What has changed

What did we find

What does it mean to you

Why did we do this research – Objectives

MEASURE

the media behaviours/ attitudes of the Canadian **Public** – if/how they might differ from the **Industry**

ASSESS

how well the **Industry** understands the behaviors/attitudes of the **Public**

CONSIDER

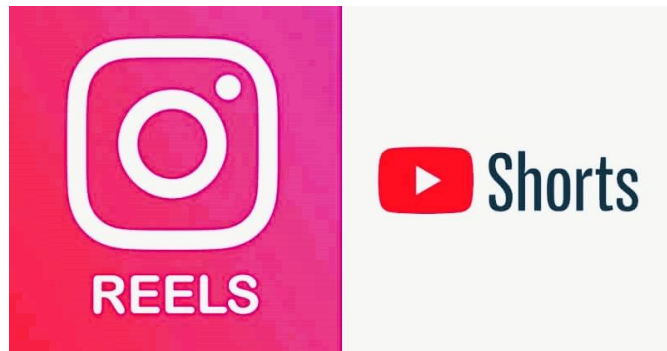
if/how the **Industry** behaviors and attitudes inform their perceptions of the **Public**

What has changed since we last did this research in 2023

Ad supported streaming



Proliferation of video on Social



The three MOREs

1. Spend more.
2. Watch more.
3. Advertise more.

Explosive Growth of Retail Media



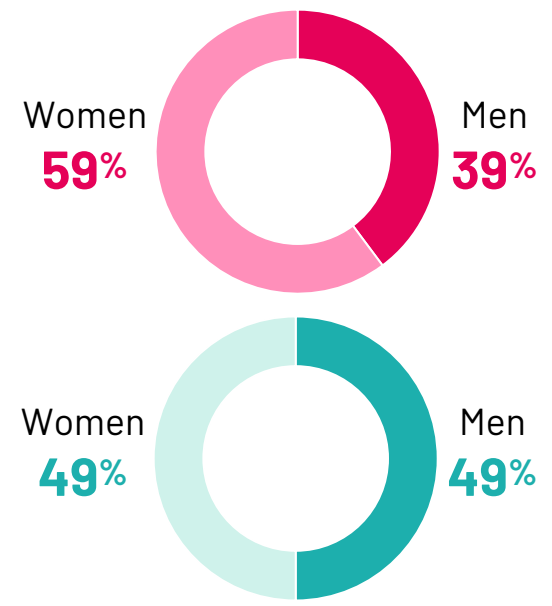
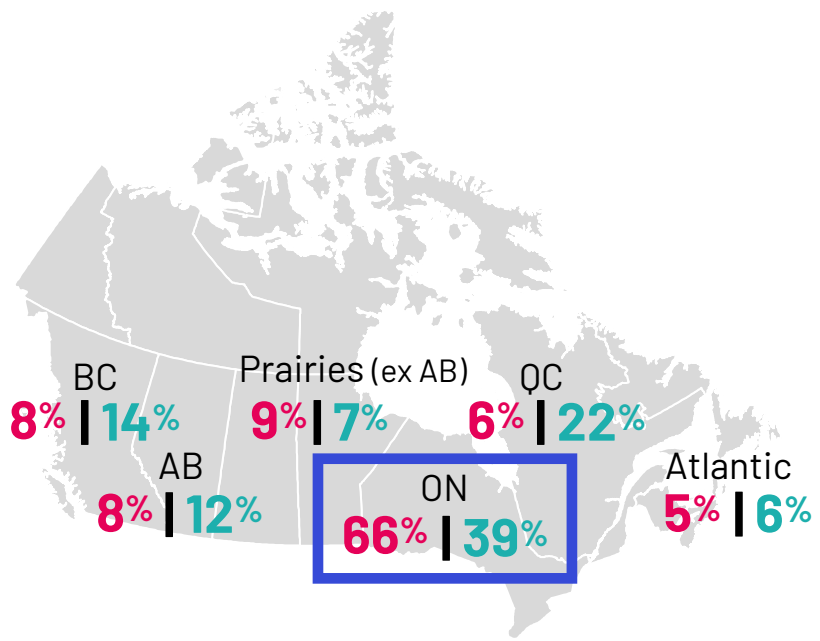
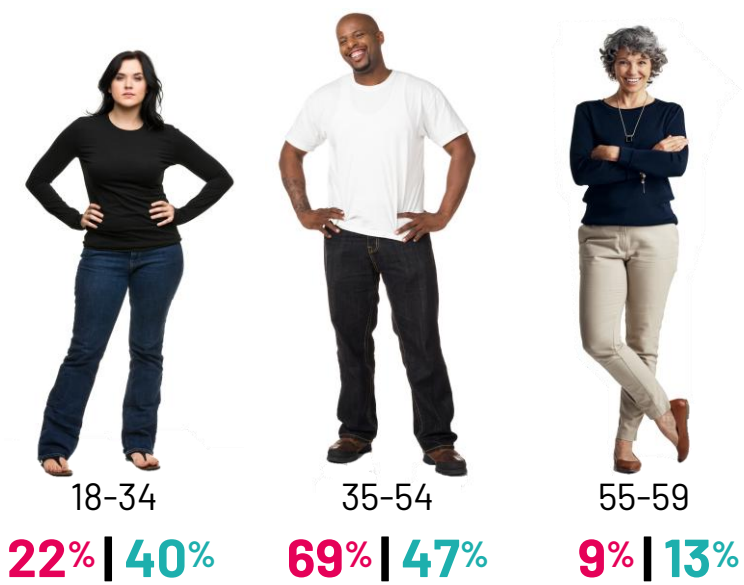
Fragmentation is abundant



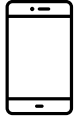
Live Sports is where Prime Real Estate meets Collective Cultural Moments



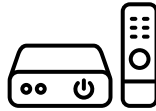
About **US** and **THEM**



About **US** and **THEM**



SMARTPHONE



TV STREAMING DEVICE



SMART SPEAKERS



SMART TV

Us

95%

51%

48%

76%

Them

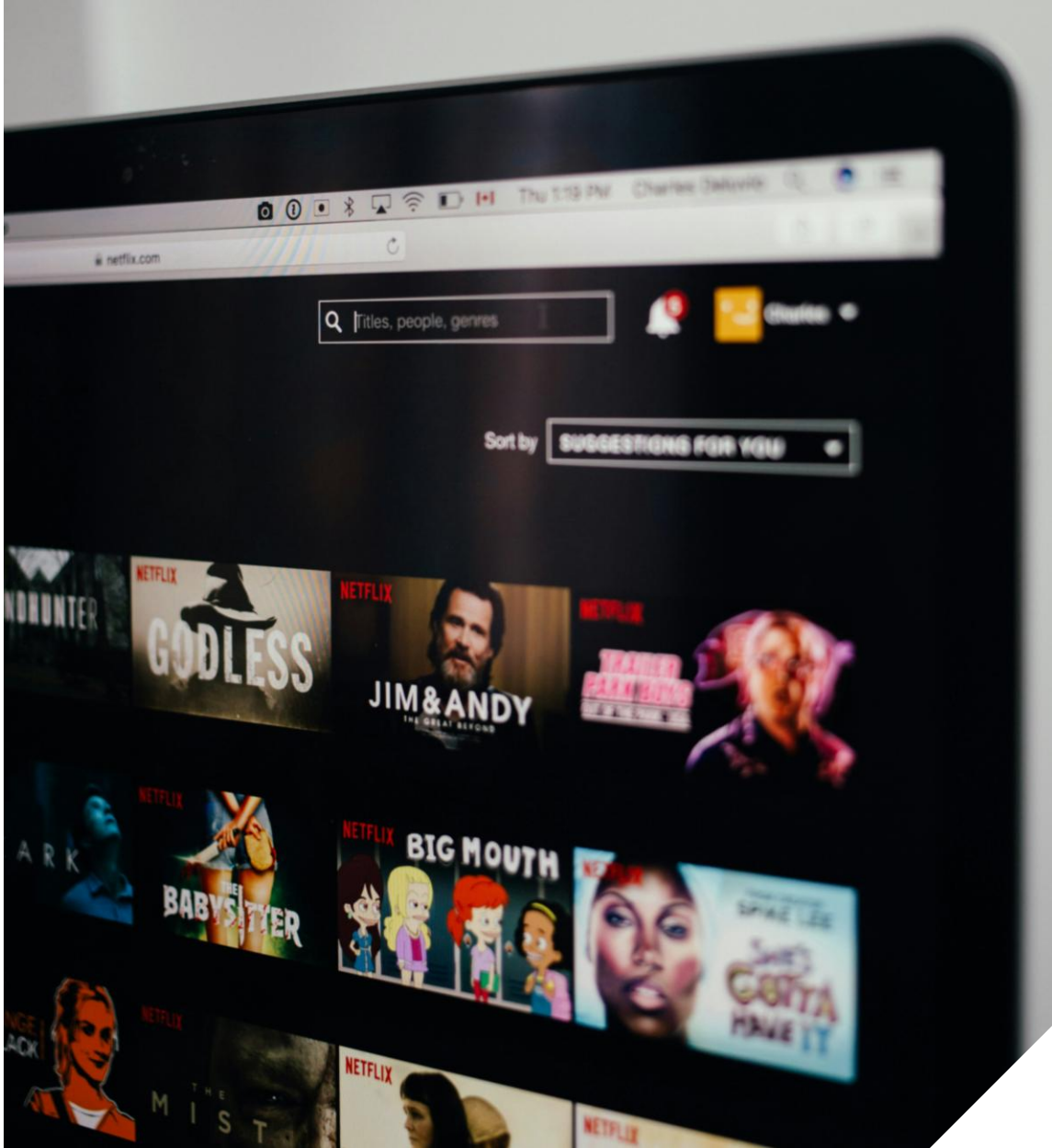
81%

27%

23%

57%





About **US** and **THEM**

	NETFLIX	PRIME VIDEO	APPLE TV	DISNEY+
Us	89%	84%	38%	59%
Them	63%	56%	10%	34%

TV Viewing CLARITY

Average Weekly Reach, 2020

27,528,000

18+

6,968,000

18-34

Average Weekly Reach, 2026

26,921,000

18+

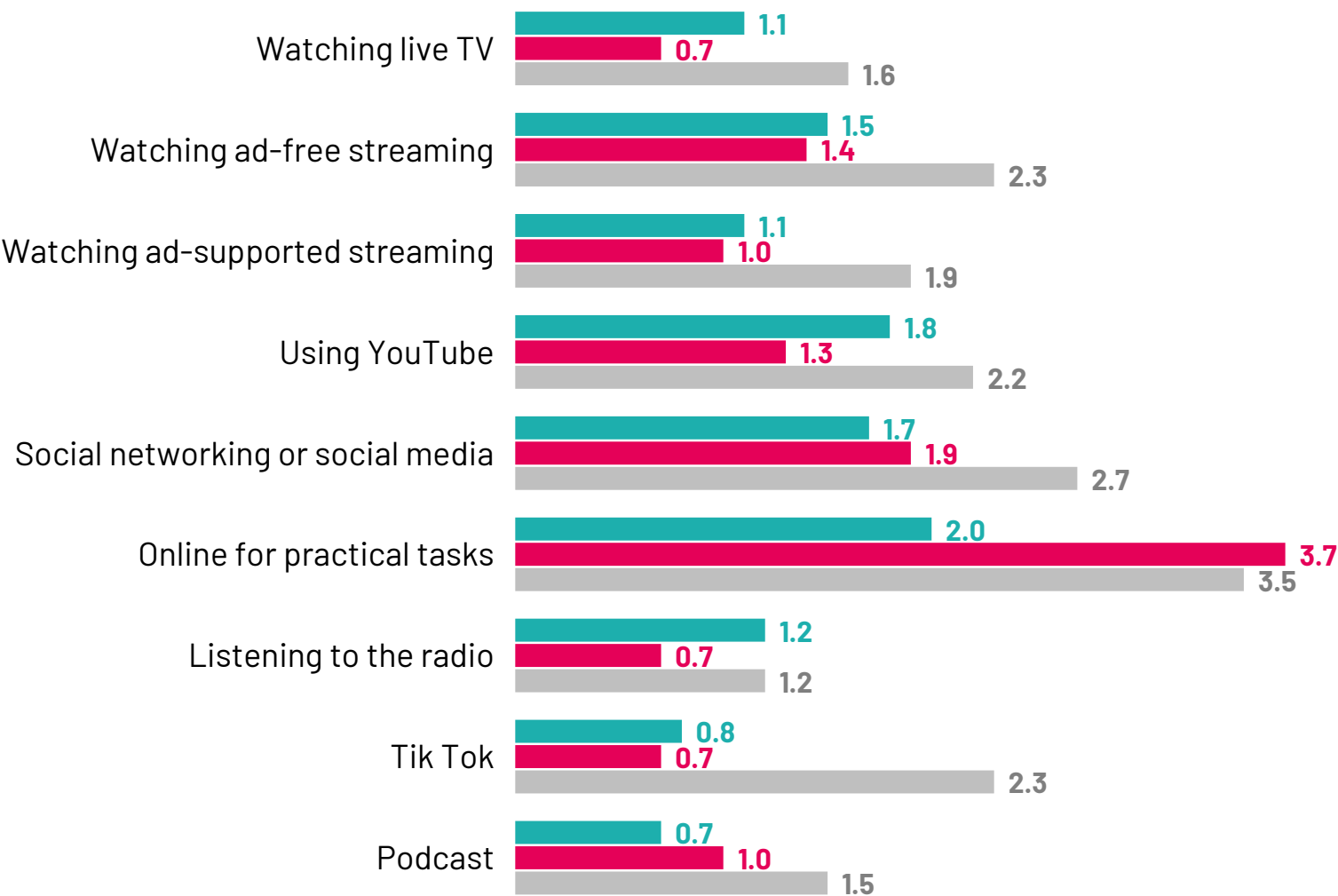
6,589,000

18-34

Our perceptions of public media consumption differs significantly from reality

Daily Time Spent on Different Media Types (mean number of hours)

- CANADIAN PUBLIC
- INDUSTRY PROFESSIONALS
- 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?

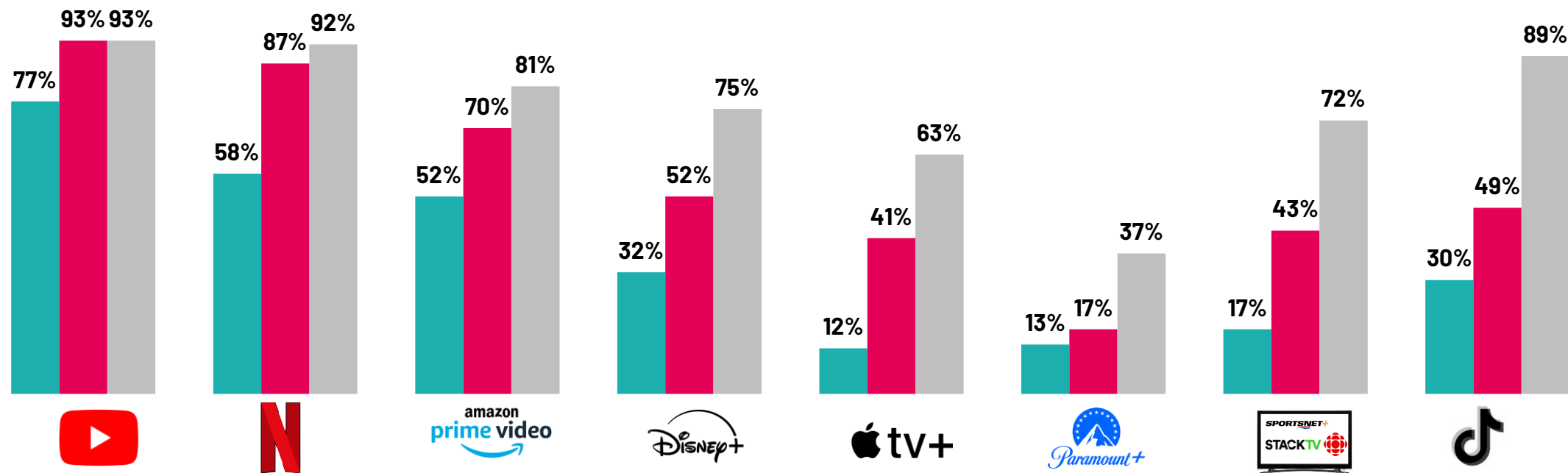


The public is less engaged on digital platforms than we think

- CANADIAN PUBLIC
- INDUSTRY PROFESSIONALS
- INDUSTRY'S ESTIMATE OF THE GENERAL PUBLIC

Apps Used in the Past Month: Video Forward Platforms (1/2)

Avg gap = 35 ppts!



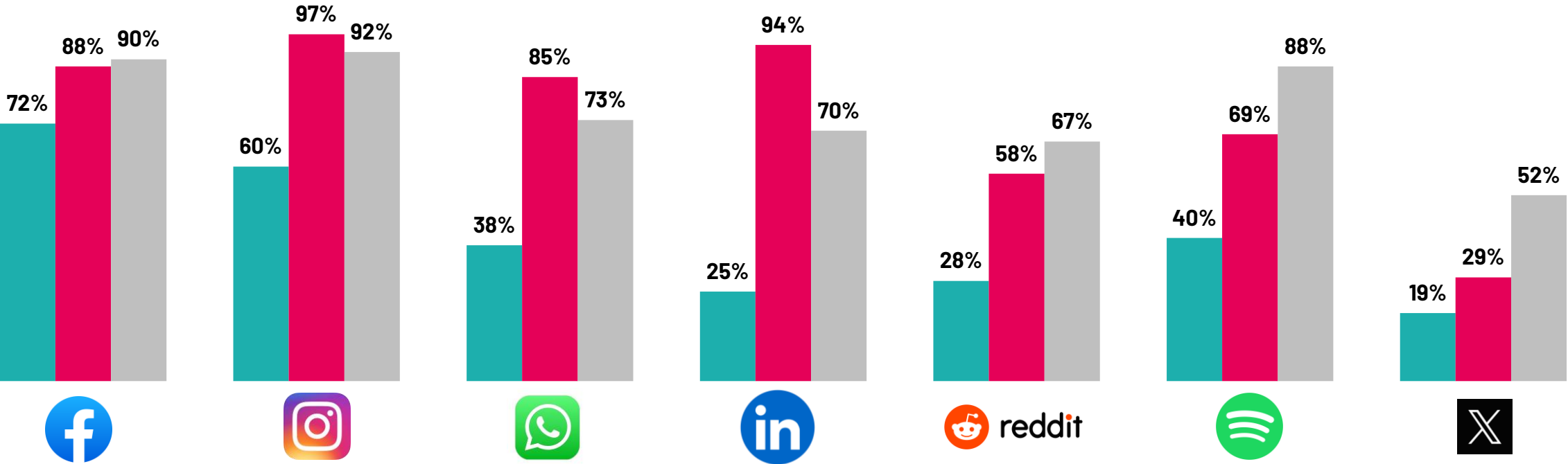
Which of the following websites, apps, or services have you visited or used in the last 1 month?
Which of the following websites, apps, or services do you think that the average adult Canadian has visited or used in the last 1 month?



The public is less engaged on digital platforms than we think

- CANADIAN PUBLIC
- INDUSTRY PROFESSIONALS
- INDUSTRY'S ESTIMATE OF THE GENERAL PUBLIC

Apps Used in the Past Month: Social & Music Platforms (2/2)



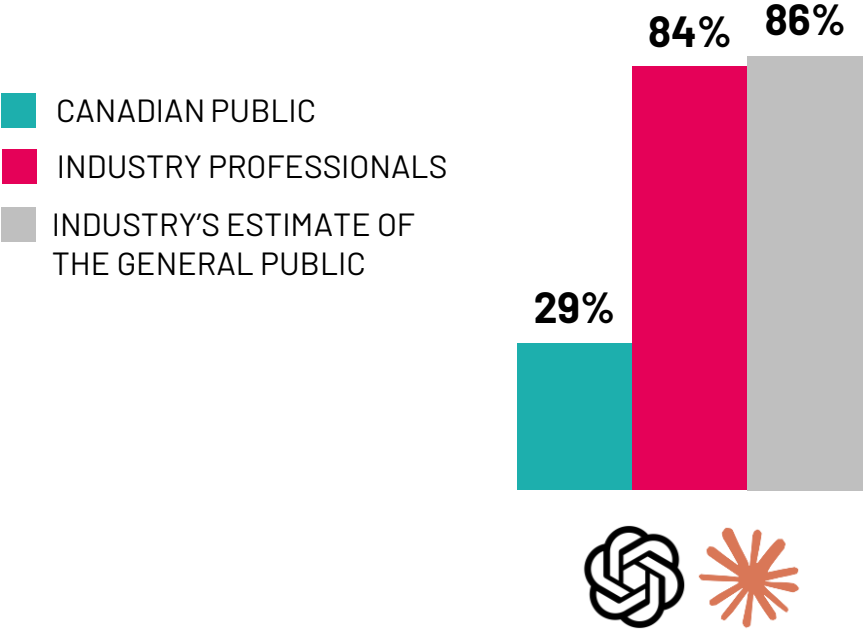
Which of the following websites, apps, or services have you visited or used in the last 1 month?
Which of the following websites, apps, or services do you think that the average adult Canadian has visited or used in the last 1 month?
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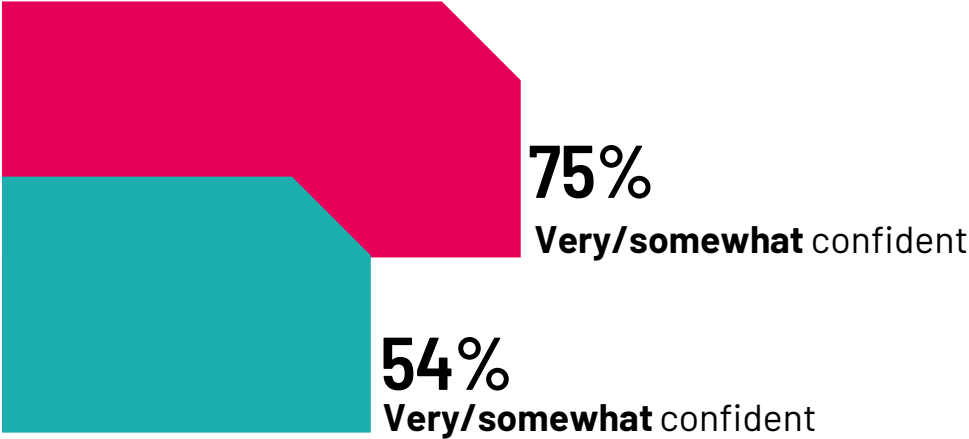
Our usage of AI skews our perception of public usage



Apps Used in the Past Month



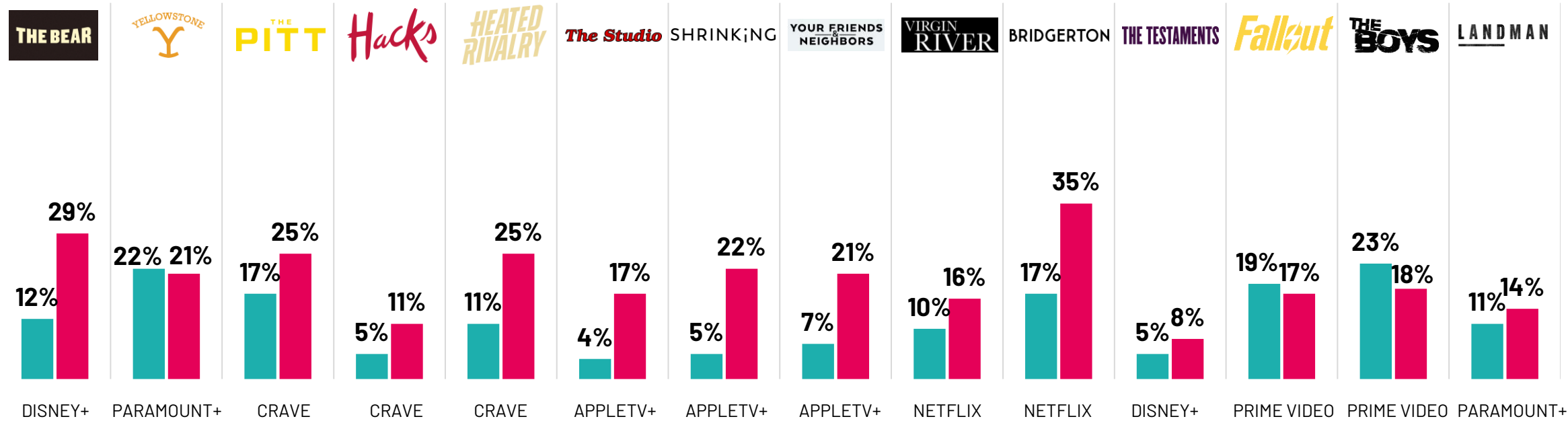
Confidence in Detecting AI



Industry professionals are more tapped into new releases

CANADIAN PUBLIC
INDUSTRY PROFESSIONALS

At Least One Episode Watched in Past 6 Months



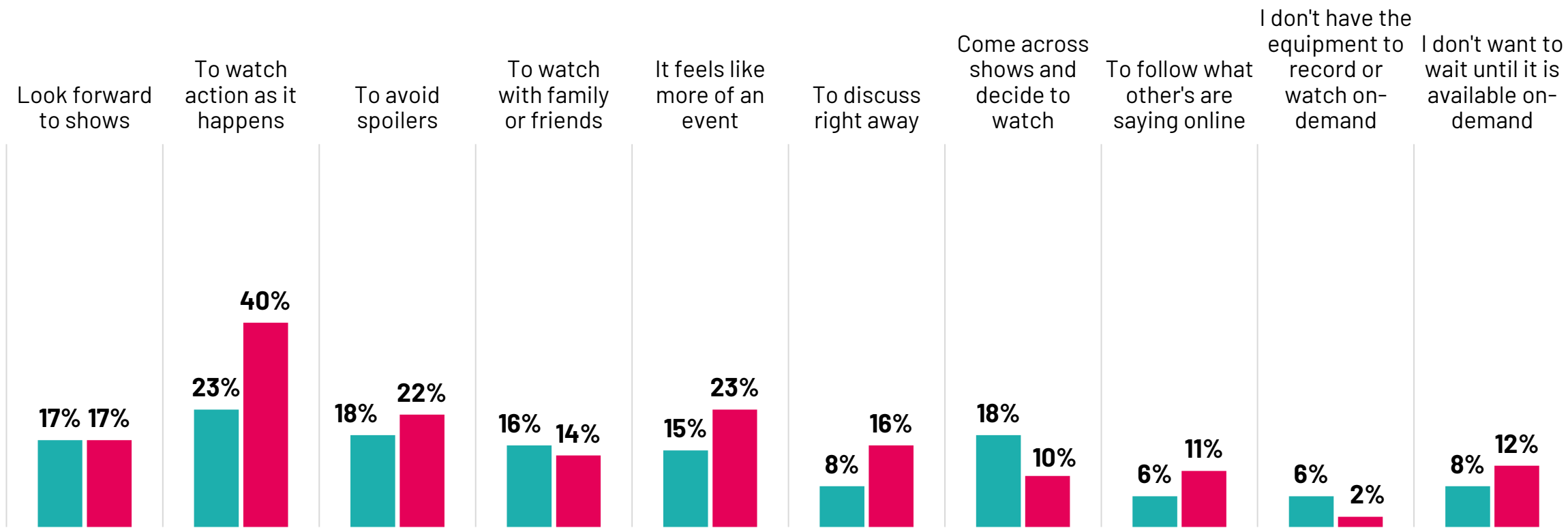
Which of the following shows have you watched at least one episode of in the last 6 months?



...And far more interested in watching them as they air

CANADIAN PUBLIC
INDUSTRY PROFESSIONALS

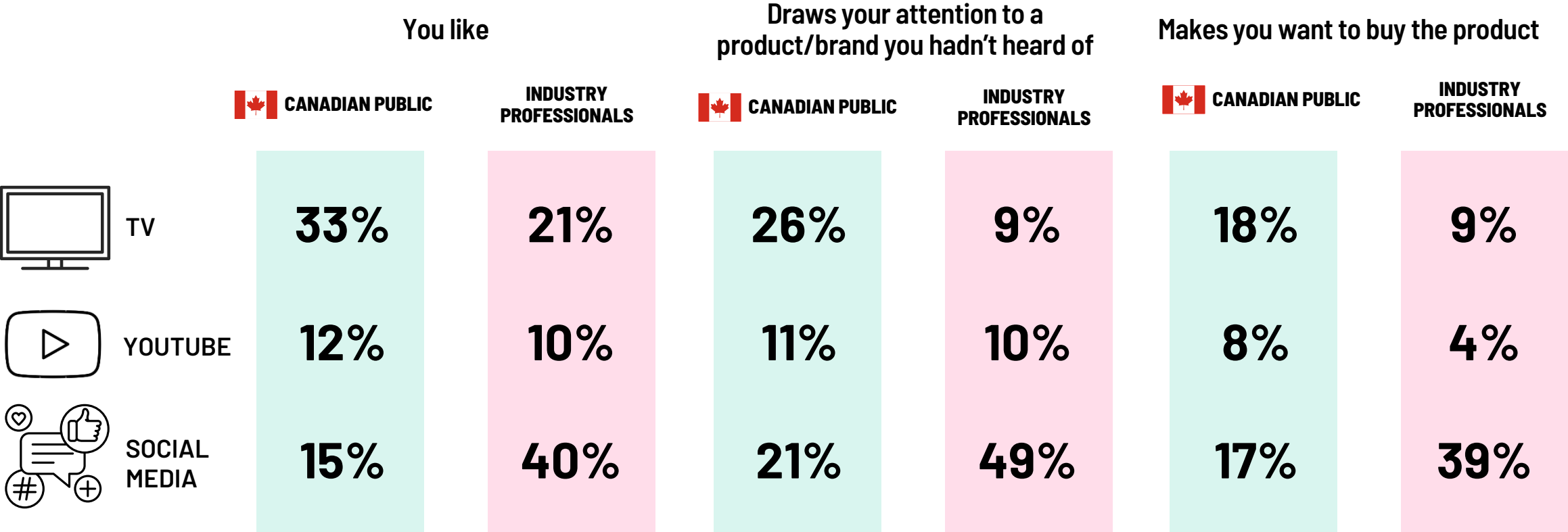
Why do People Watch Live TV?



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?

More of a gulf than a gap between Public and Industry regarding advertising on TV versus Social Media

Media Sources on which you find advertising that...



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

TV more memorable and more emotional – we like our own work

Media Sources on which you find advertising that...

Sticks in your memory

Makes you feel emotional

 CANADIAN PUBLIC

INDUSTRY
PROFESSIONALS

 CANADIAN PUBLIC

INDUSTRY
PROFESSIONALS



TV

35%

45%

29%

53%



YOUTUBE

12%

6%

12%

14%



SOCIAL
MEDIA

12%

21%

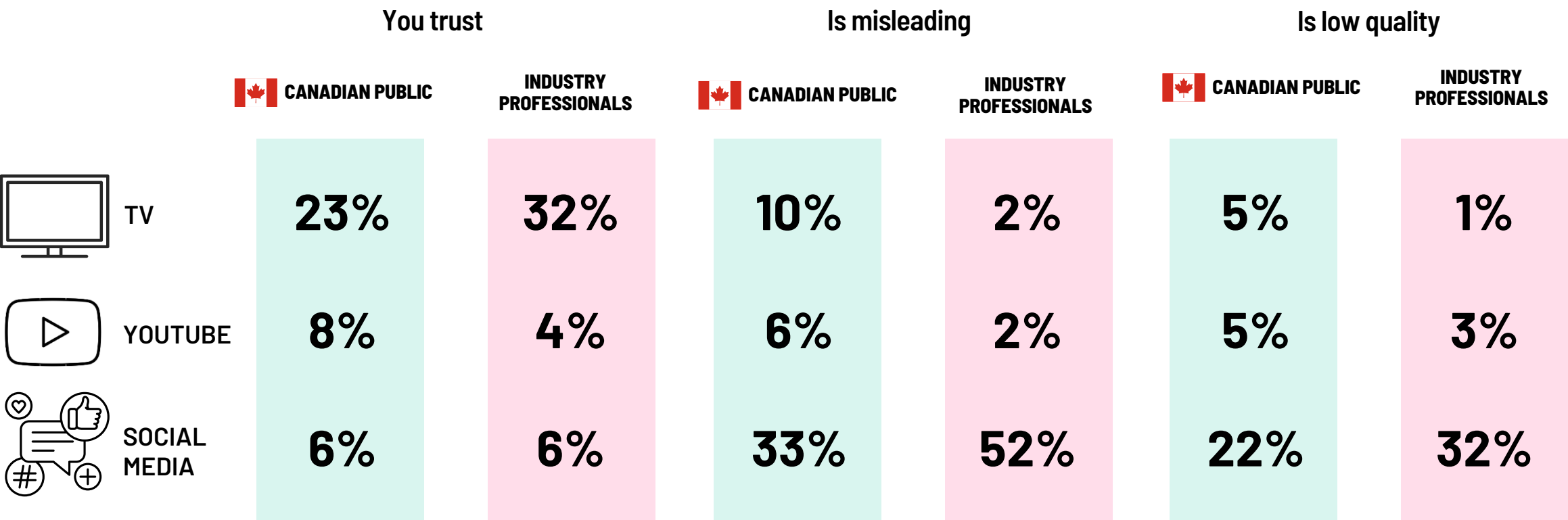
12%

19%

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

We're aligned in our skepticism that social media can be misleading /quality concerns

Media Sources on which you find advertising that...



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

Where does this leave Us?

Public vs. Industry: **We are different** in so many ways.

Our perception of the public's media consumption (some gross overestimations) continues to be distorted and may well be impacting media buying practices.

Everyone **loves live TV**, because we view it as **a SOCIAL event** – We hate spoilers and can't wait to talk about TV with their friends and family.

Trust in all advertising (particularly digital) remains lacking and needs a credibility boost.

At minimum we, as an industry, need to be thinking about adjusting our marketing and media plans with the Canadian public in mind.

At best there is a need for some level setting and training.

THANK YOU

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