MIND THE (MEDIA) GAP

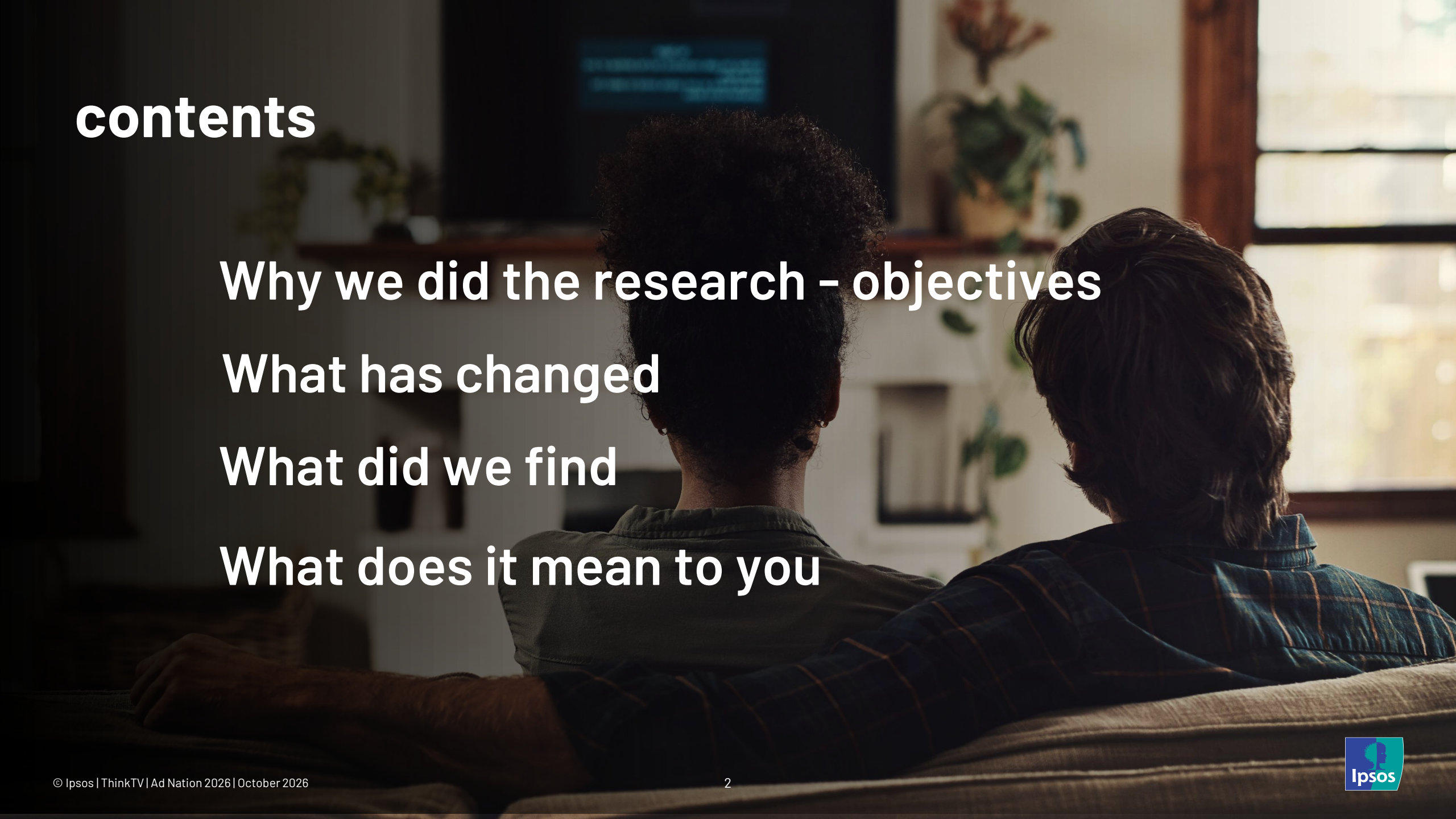
AD NATION 2026 - Canadian and Industry Perceptions of Advertising & Media

October 2026



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contents



Why we did the research – objectives

What has changed

What did we find

What does it mean to you

thank you to our survey partners

CMA Canadian Marketing Association

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



The three MOREs

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

Fragmentation is abundant



Proliferation of video on Social

REELS

Shorts

Explosive Growth of Retail Media





Live Sports is where Prime Real Estate meets Collective Cultural Moments



About US and THEM



18-34

22% | 40%



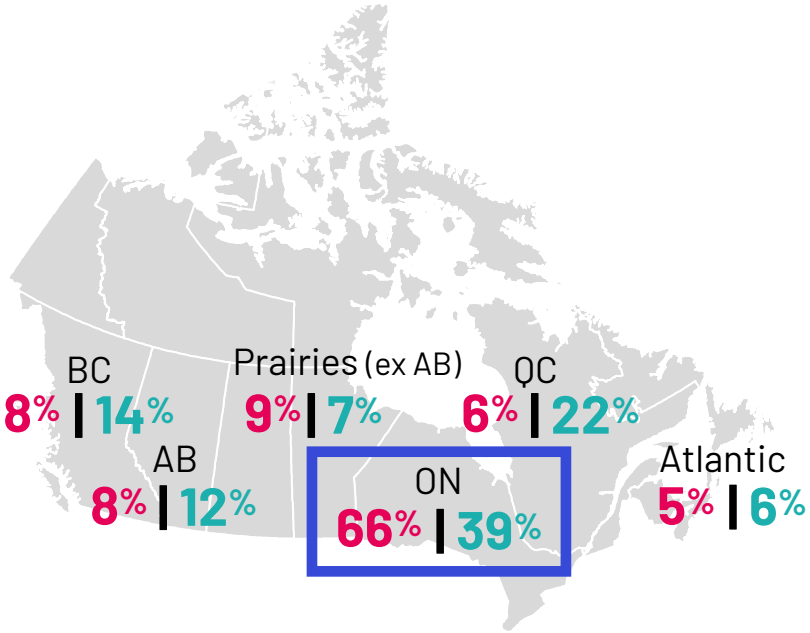
35-54

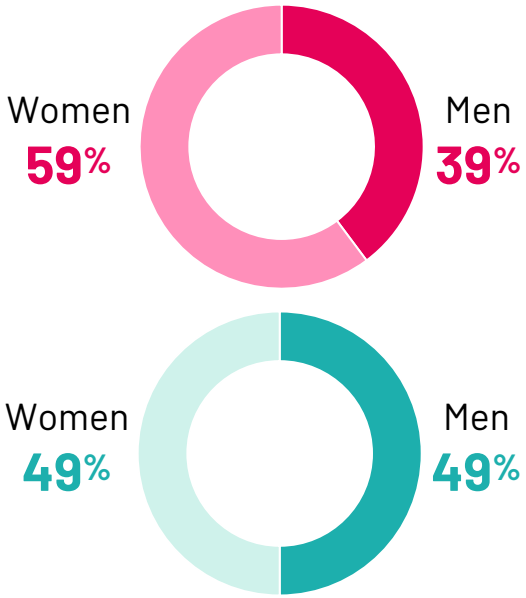
69% | 47%



55-59

9% | 13%





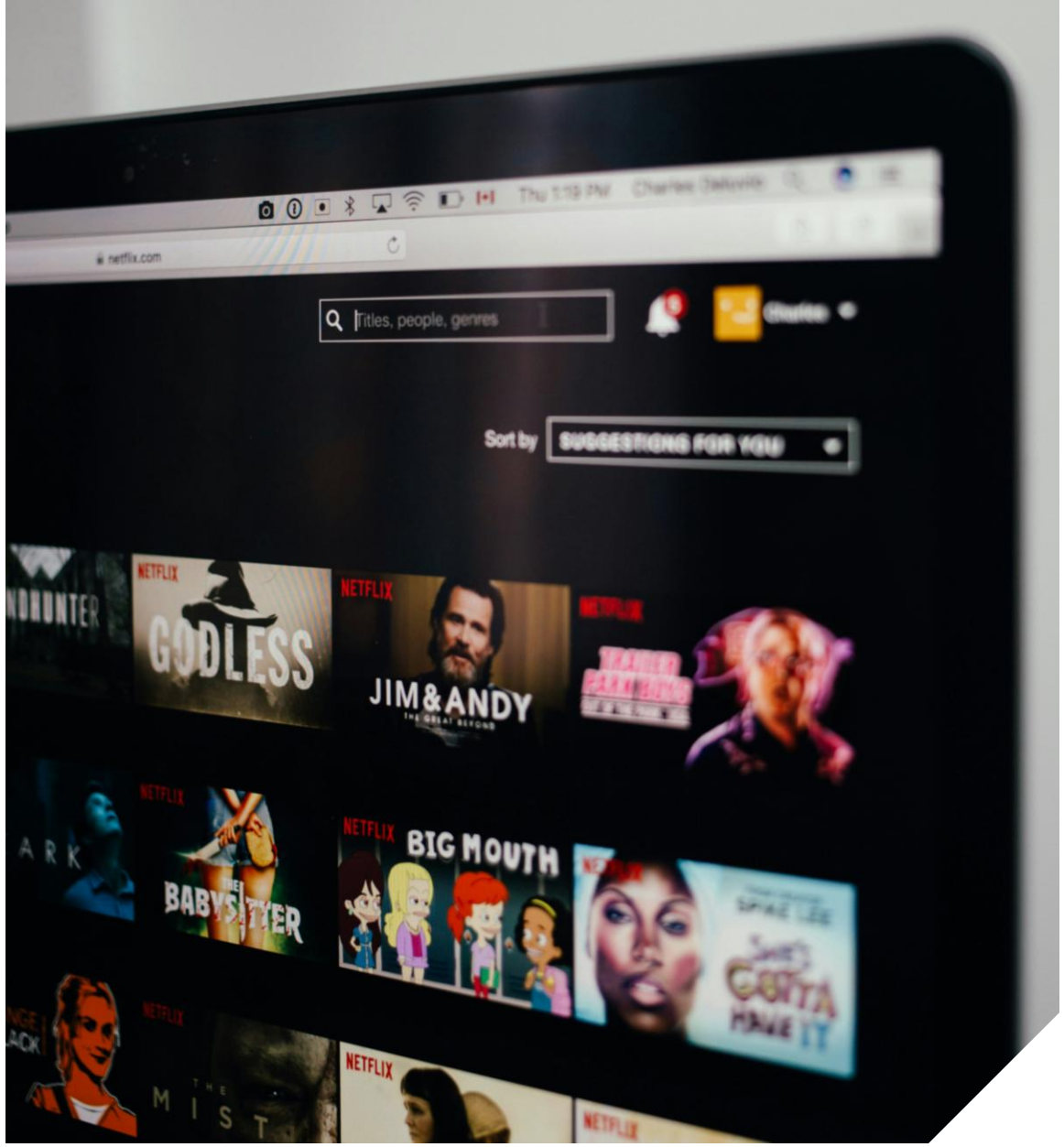
69%	8%	8%	7%	6%	2%
Client-side organization	Media agency	Digital agency	Publisher*	Creative agency	Advertiser

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

About US and THEM

	SMARTPHONE	TV STREAMING DEVICE	SMART SPEAKERS	SMART TV
Us	95%	51%	48%	76%
Them	81%	27%	23%	57%

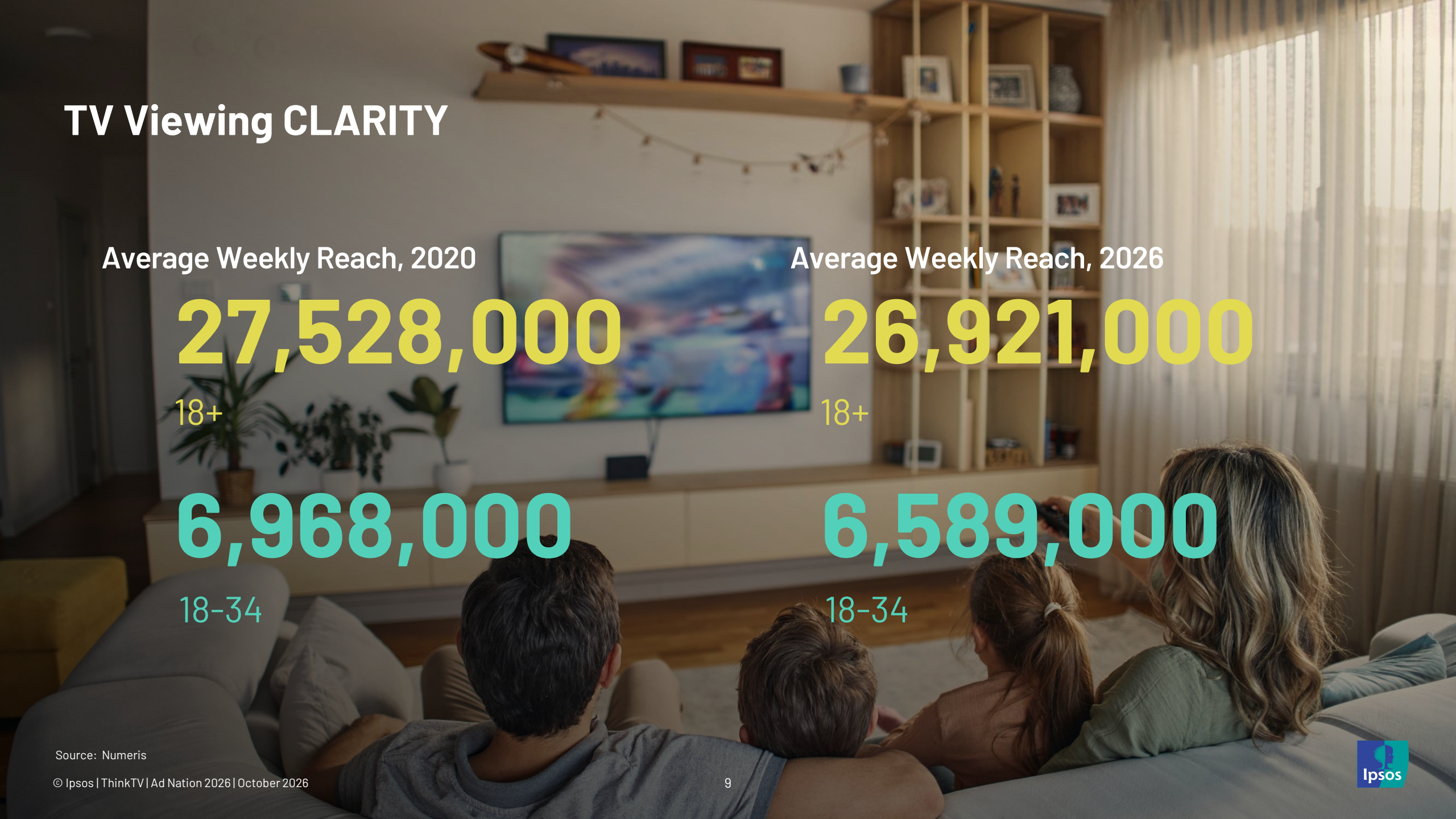




About US and THEM

	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

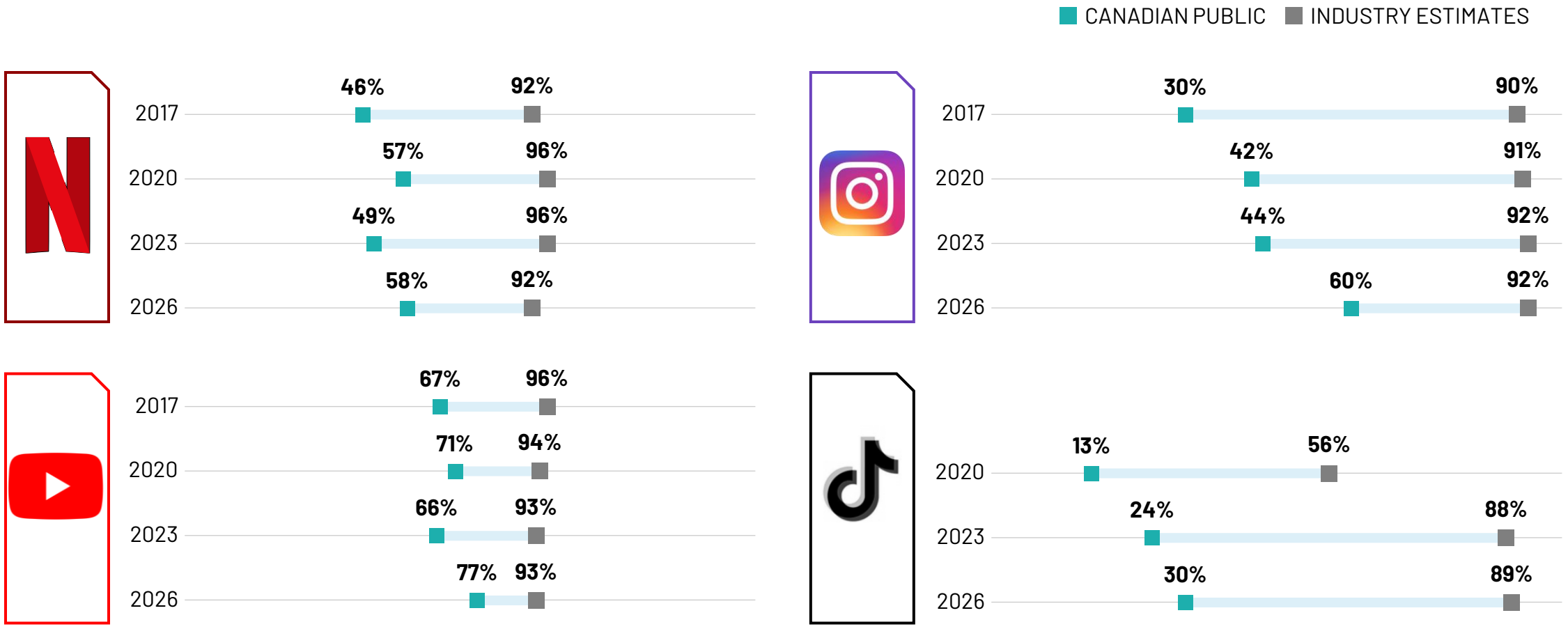
18-34

Source: Numeris

Ten Years: How Times Don't Change

Past Month Social Media Usage

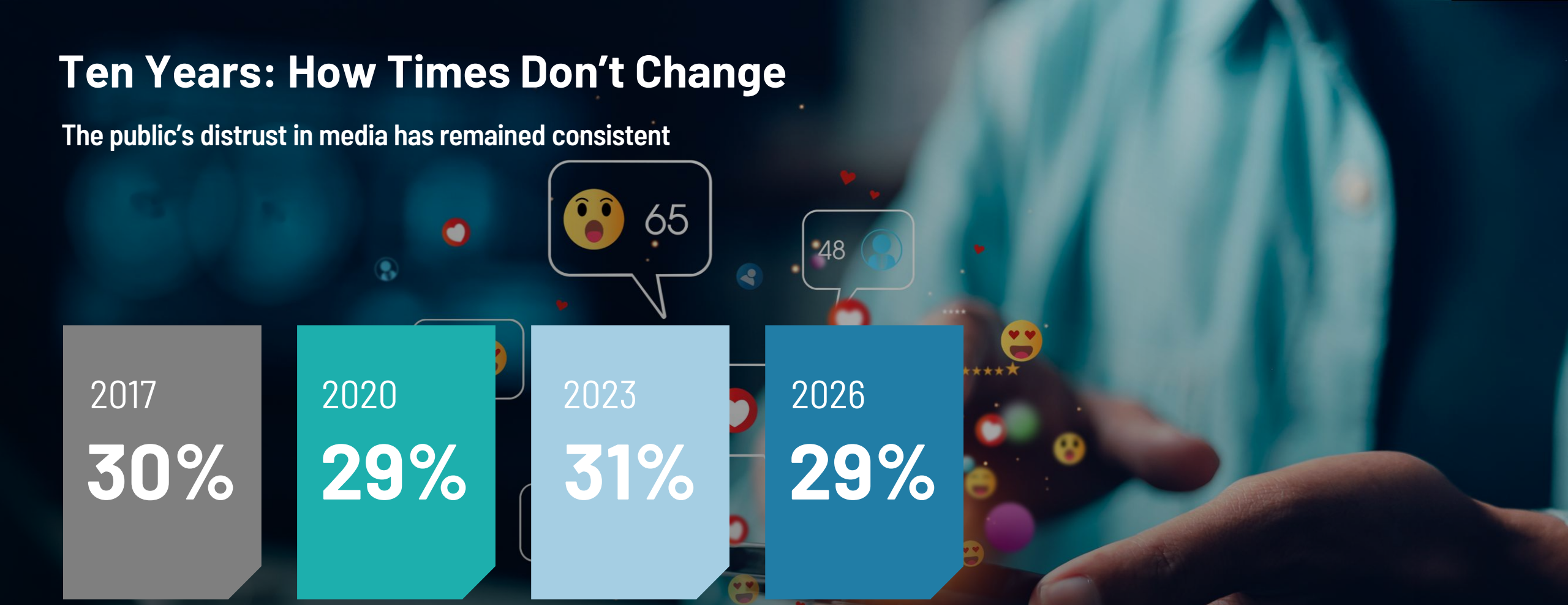
Industry professionals have continuously overestimated the public's digital and app usage over the years.



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?
TikTok added in 2020

Ten Years: How Times Don't Change

The public's distrust in media has remained consistent

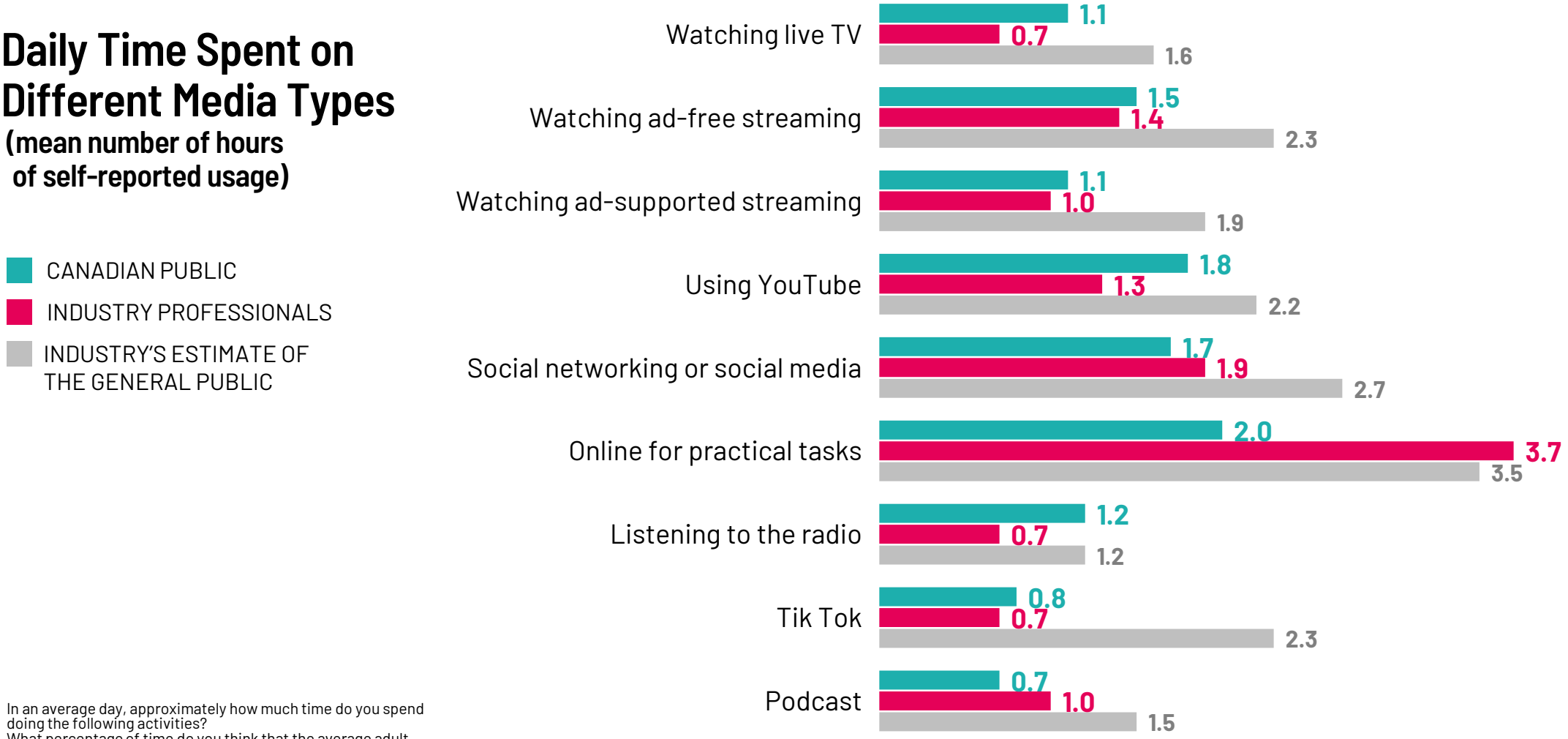


In which of the following media are you most likely to find advertising that **you trust**? [% selected 'none of these']

Our assumptions of public media consumption differs significantly from reality

Daily Time Spent on Different Media Types

(mean number of hours of self-reported usage)

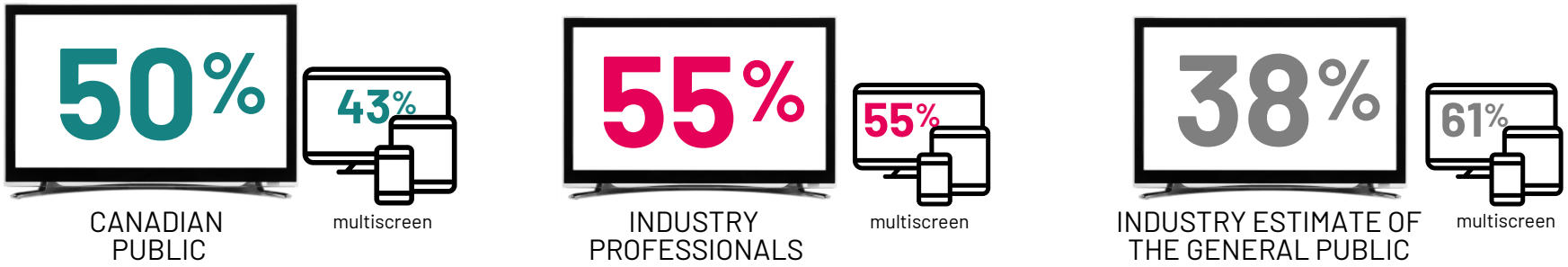


In an average day, approximately how much time do you spend doing the following activities?
What percentage of time do you think that the average adult Canadian spends doing the following activities in an average day?

The public remains more engaged with the TV set than we think they are

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

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



	CANADIAN PUBLIC	INDUSTRY PROFESSIONALS	INDUSTRY ESTIMATE OF THE GENERAL PUBLIC
Smartphone	22%	24%	33%
Laptop/Desktop	17%	14%	15%
Tablet	6%	5%	10%
Game Console	3%	0%	4%

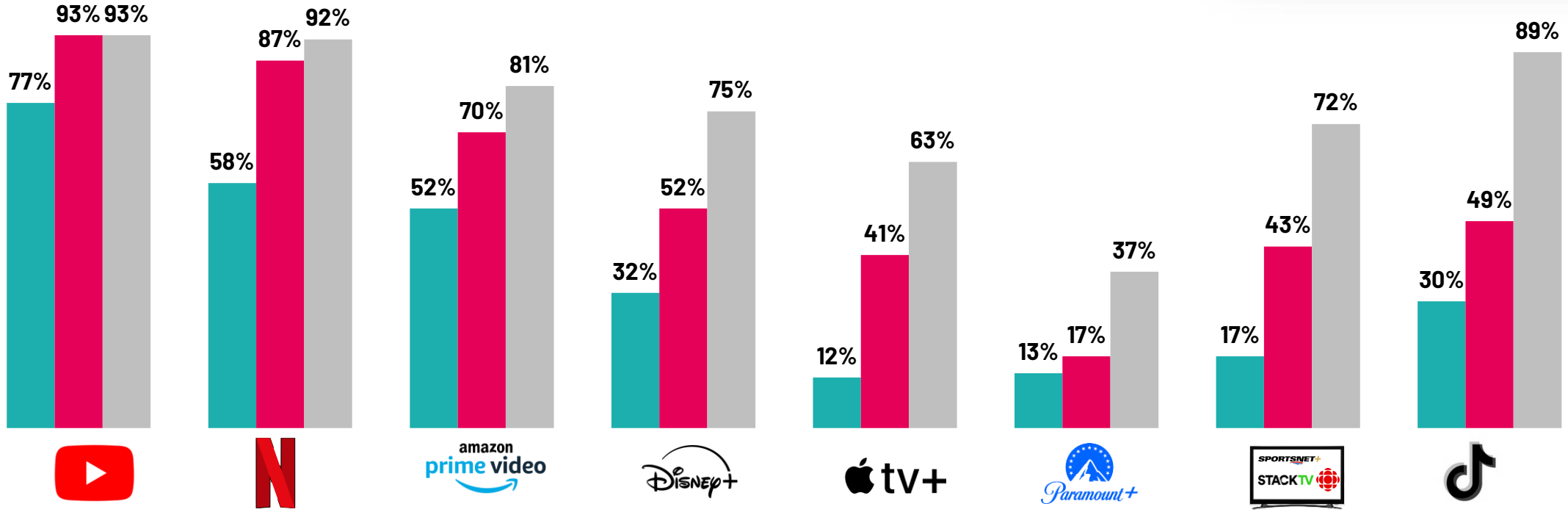
Of the time you spend watching TV shows or movies (excluding DVDs or shows from a subscription on-demand service like Netflix or Amazon), what percentage of that time is spent watching on a...?
When watching TV, for what percentage of time do you think you use another device (smartphone, tablet, laptop/PC,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

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!



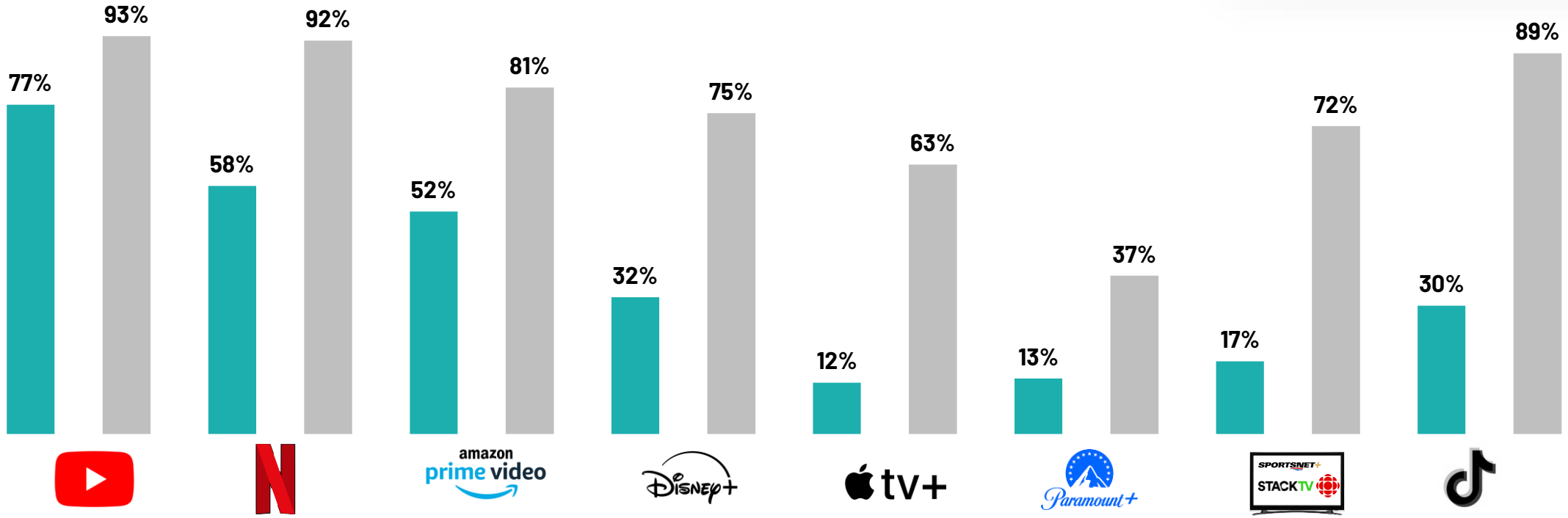
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Which of the following websites, apps, or services do you think that the average adult Canadian has visited or used in the last 1 month?

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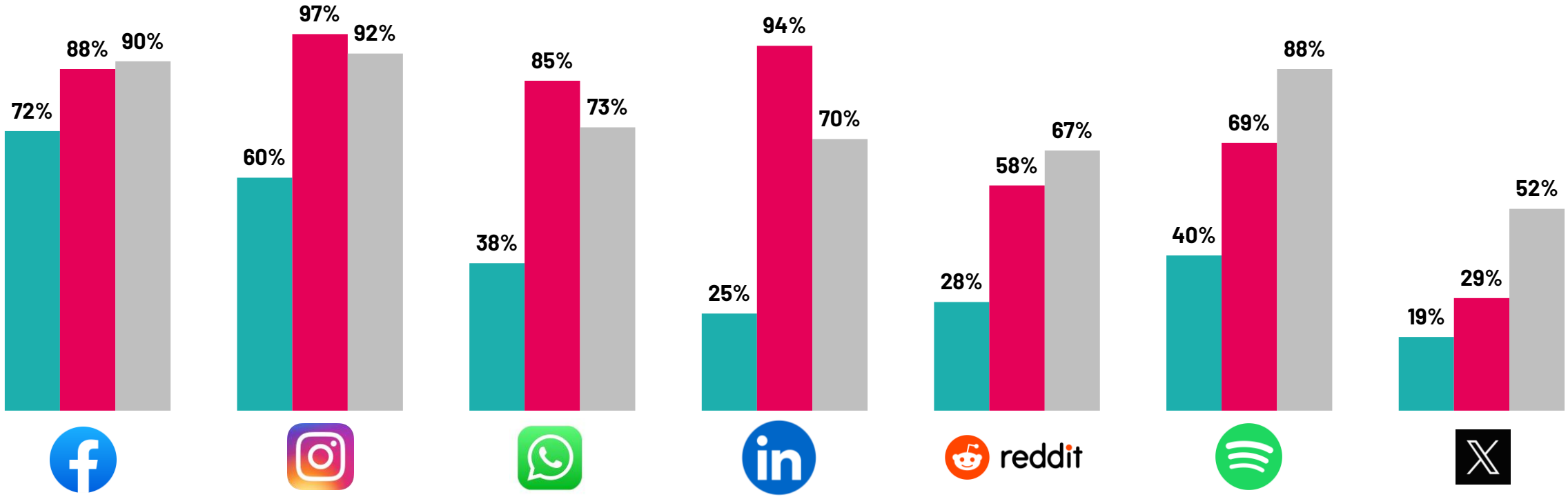


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The public is less engaged on digital platforms than we think

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

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

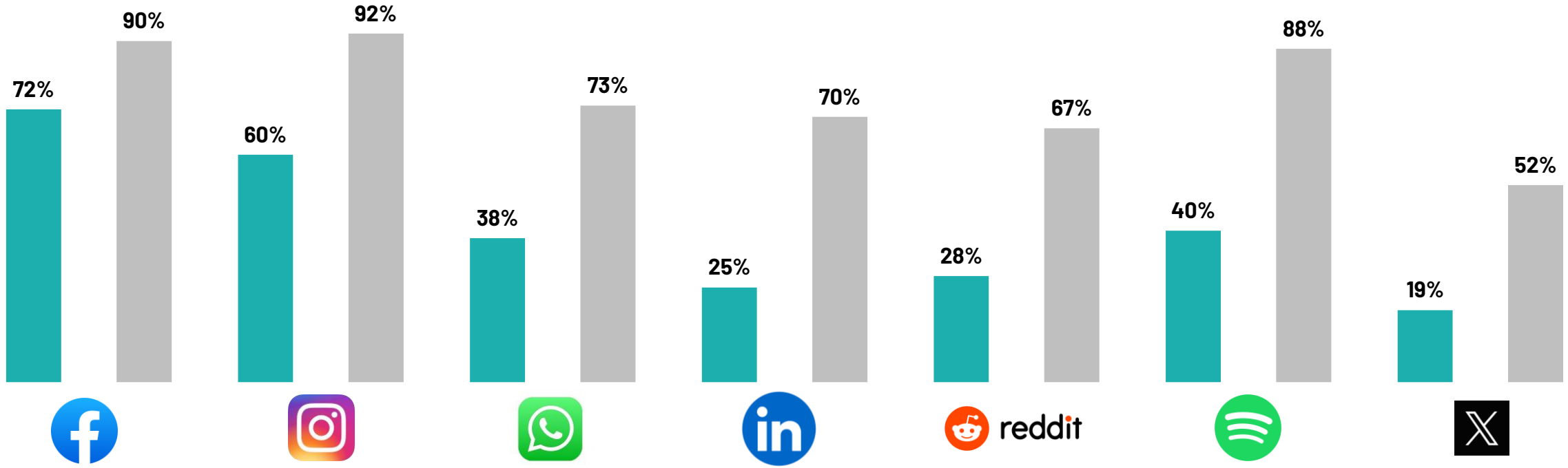


Which of the following websites, apps, or services have you visited or used in the last 1 month?
Which of the following websites, apps, or services do you think that the average adult Canadian has visited or used in the last 1 month?

The public is less engaged on digital platforms than we think

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

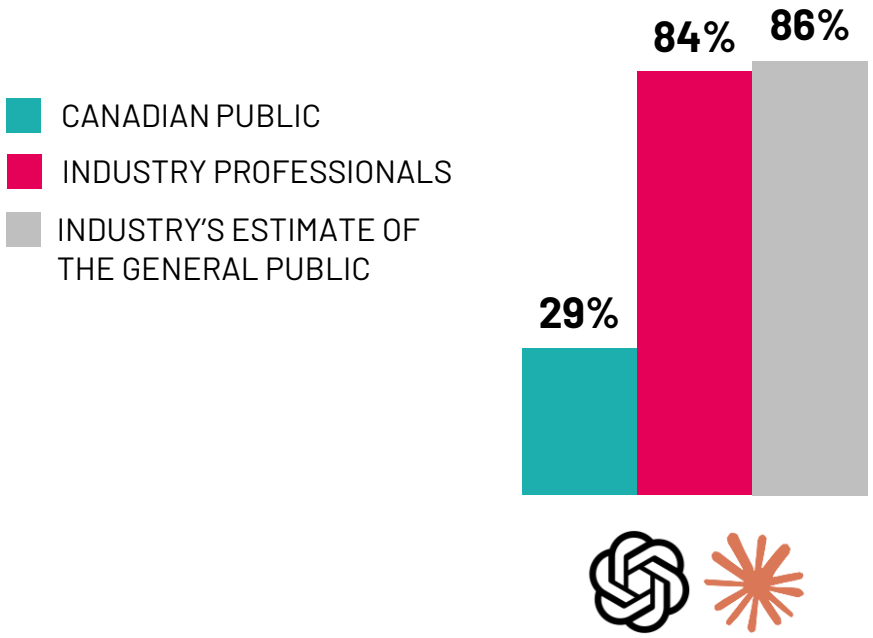
Apps Used in the Past Month: Social & Music Platforms (2/2)



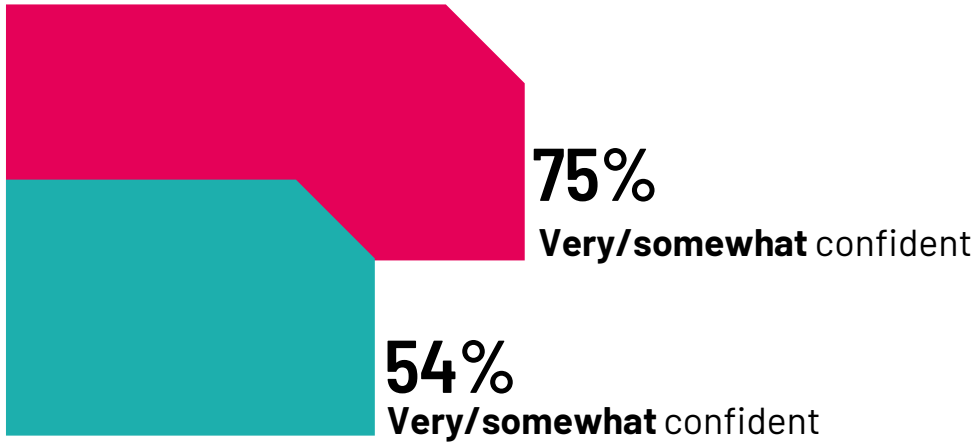
Which of the following websites, apps, or services have you visited or used in the last 1 month?
Which of the following websites, apps, or services do you think that the average adult Canadian has visited or used in the last 1 month?

Our usage of AI skews our perception of public usage and we think we've "got it"!

Apps Used in the Past Month



Confidence in Detecting AI



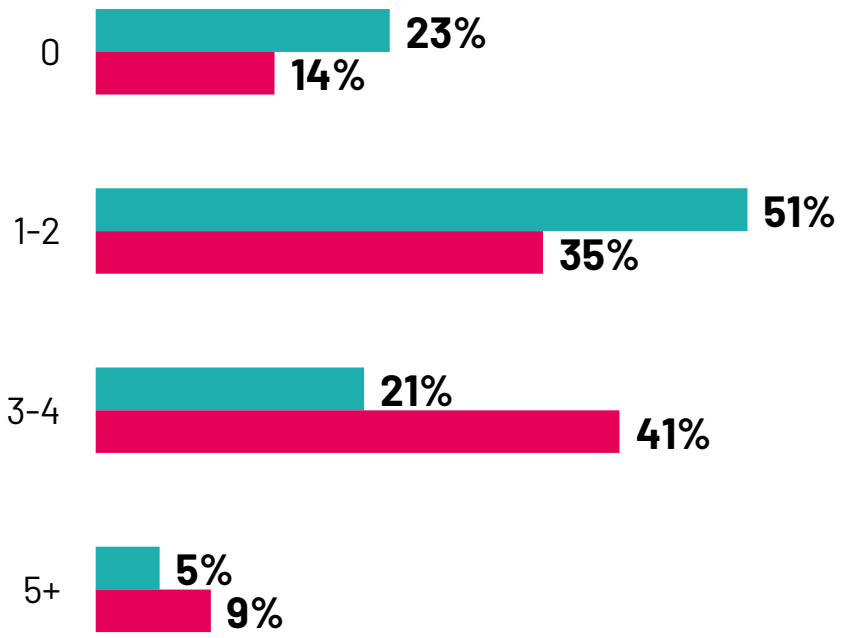
Which of the following websites, apps, or services have you visited or used in the last 1 month? [AI search engine (e.g. ChatGPT, Claude)]
Which of the following websites, apps, or services do you think that the average adult Canadian has visited or used in the last 1 month? [AI search engine (e.g. ChatGPT, Claude)]
How confident are you that you can identify AI-generated content (e.g., images, videos, articles)? Very/Somewhat confident

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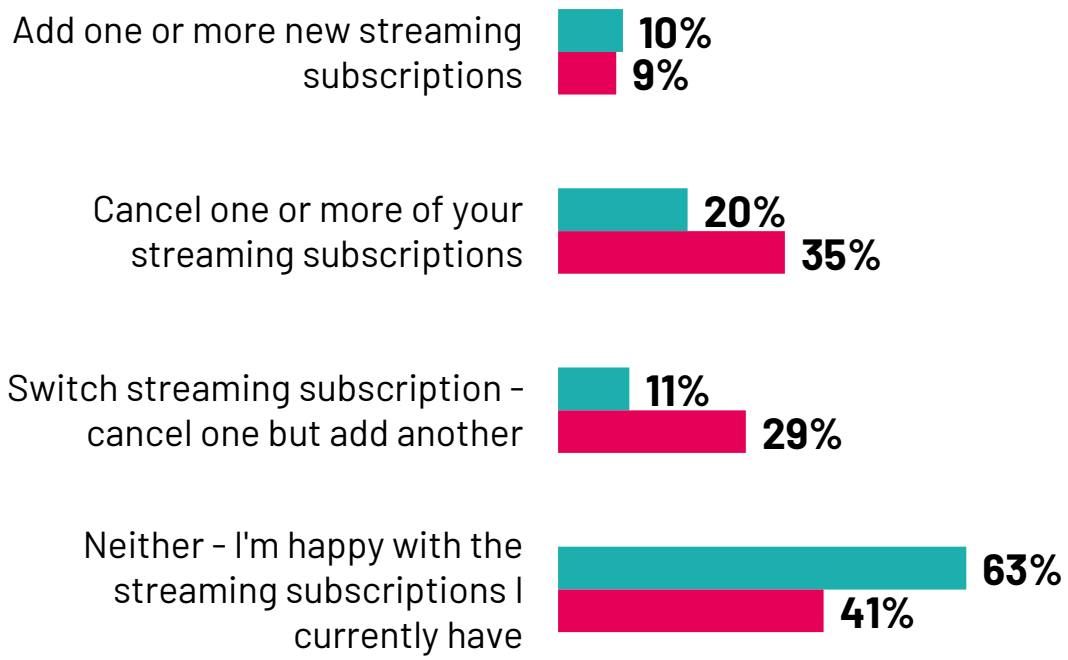
Streaming is firmly established, but subscribers are becoming more selective about which services they keep

CANADIAN PUBLIC INDUSTRY PROFESSIONALS

Number of Paid Commercial-Free Streaming Services

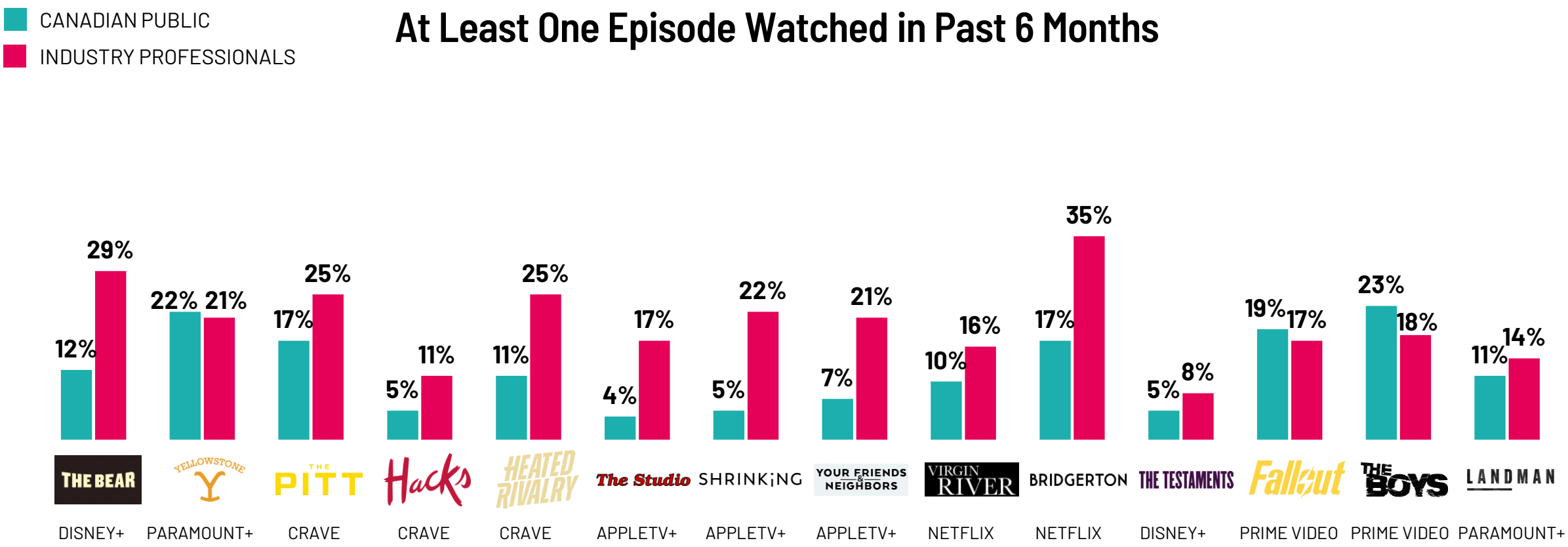


Which of the Following are you Likely to do this year...



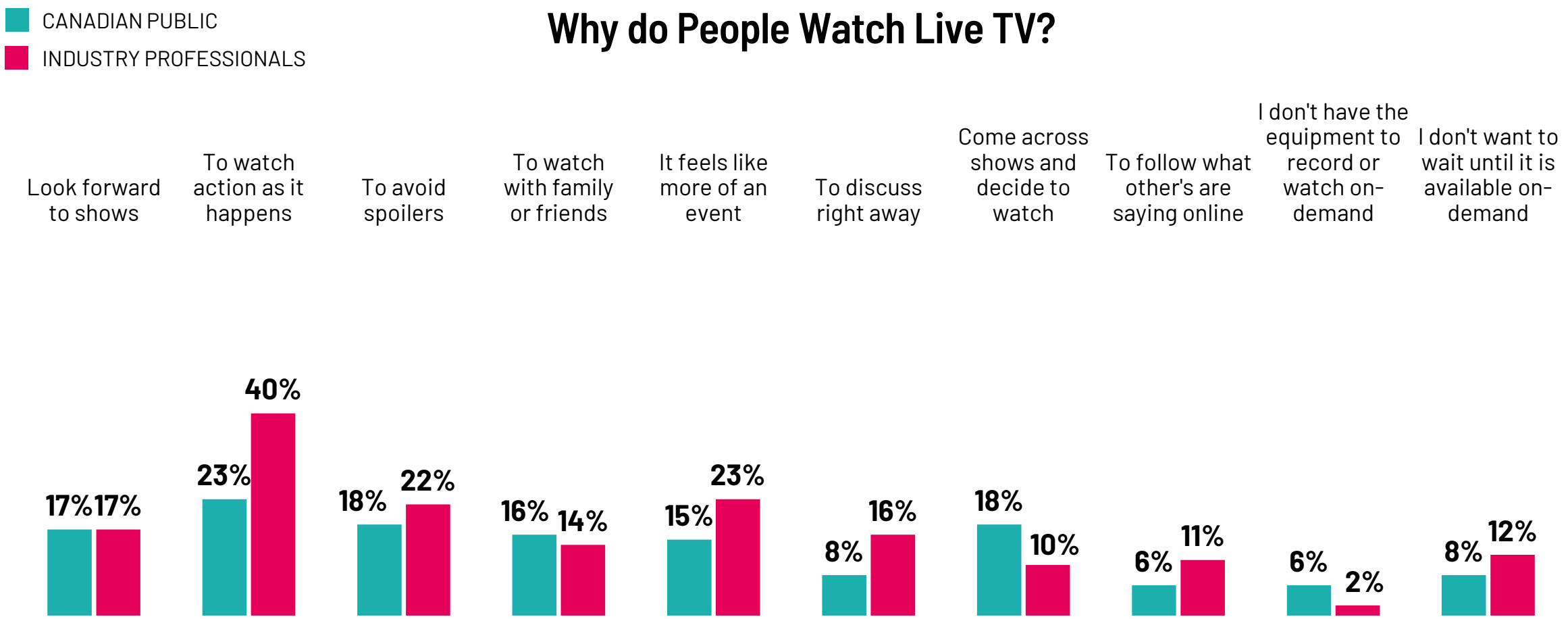
How many paid commercial-free streaming services (e.g. Netflix, Disney+, Prime Video) do you currently have?
Which of the following are you likely to do this year?

Industry professionals are more tapped into new releases



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



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?

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...

	You like		Draws your attention to a product/brand you hadn't heard of		Makes you want to buy the product	
	CANADIAN PUBLIC	INDUSTRY PROFESSIONALS	CANADIAN PUBLIC	INDUSTRY PROFESSIONALS	CANADIAN PUBLIC	INDUSTRY PROFESSIONALS
TV	33%	21%	26%	9%	18%	9%
YOUTUBE	12%	10%	11%	10%	8%	4%
SOCIAL MEDIA	15%	40%	21%	49%	17%	39%

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

	CANADIAN PUBLIC	INDUSTRY PROFESSIONALS
TV	35%	45%
YOUTUBE	12%	6%
SOCIAL MEDIA	12%	21%

Makes you feel emotional

	CANADIAN PUBLIC	INDUSTRY PROFESSIONALS
TV	29%	53%
YOUTUBE	12%	14%
SOCIAL MEDIA	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...

	You trust		Is misleading		Is low quality	
	CANADIAN PUBLIC	INDUSTRY PROFESSIONALS	CANADIAN PUBLIC	INDUSTRY PROFESSIONALS	CANADIAN PUBLIC	INDUSTRY PROFESSIONALS
TV	23%	32%	10%	2%	5%	1%
YOUTUBE	8%	4%	6%	2%	5%	3%
SOCIAL MEDIA	6%	6%	33%	52%	22%	32%

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

Steve Levy

steve.levy@ipsos.com

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