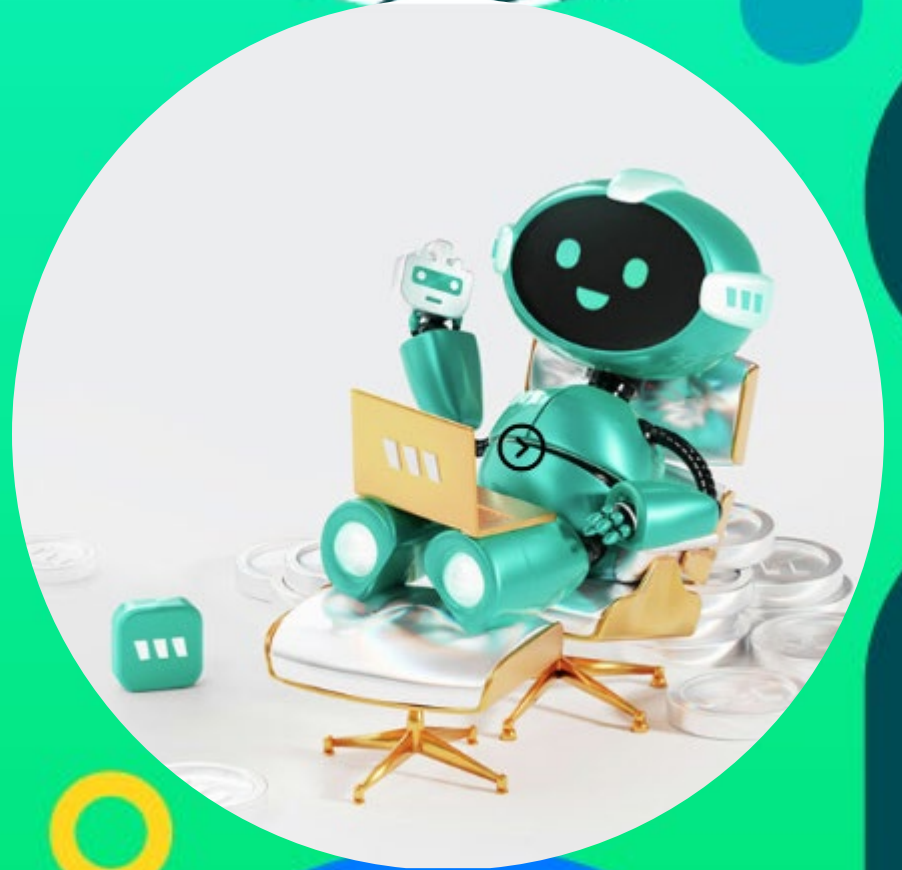


2024 State of Advertising Perceptions & Attitudes in Canada

February 2025



Numerator Surveys provides integrated analysis to accelerate your growth – by connecting you to consumers and their known behaviours.

WHO YOU NEED

Access to **verified shopping behaviours** to reach your consumers no matter how scaled or targeted

WHAT YOU NEED

Innovative **methodologies and tools** to answer a broad range of your business questions

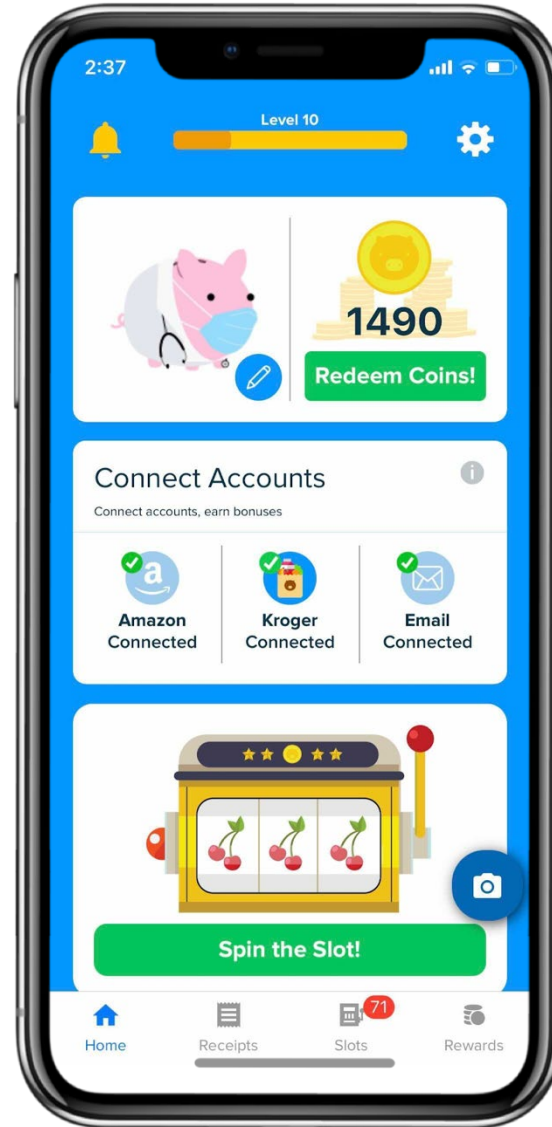
HOW YOU NEED IT

Integrated analysis with **flexible service levels and products**

Our modern Consumer Panel has higher engagement and compliance.

Gamified consumer apps and proprietary passive collection technology create unprecedented participation and scale

- AI recognition enables scale and accuracy
- 2-way interaction with panelists to understand opinions and attitudes
- Fully compliant with privacy regulations



10 seconds for receipt capture vs. 10+ minutes

10x trips per panelist captured vs Nielsen Homescan

Detailed receipts data

Retailer, Basket, Items, Payment Method and DATE/TIME all captured

Improved Shopper Info

Demographics, Psychographics and Dynamic

Our OmniPanel Has More Shoppers

Numerator

Legacy

80k+
active panelists

18k+

static panelists
(Increasing to 20K in April 2025)

8.5
Weekly trips

10X
More shopping
trips per month



More Data Points



Current demographic profiles for 99.9% of static panelists



Robust psychographic (500+) and media consumption (150+) attributes



Complete household profiles for over 90% of static panelists



Background & Research Objectives

Ad Standards is interested in conducting survey research among the general population in Canada to understand consumer current attitudes toward advertising. This presentation covers:

- General ad perceptions
- Trust and acceptability of ads
- Awareness and impact of ad regulations in Canada

Research Methodology

SAMPLE

Representative Sample of Canadian Consumers

- 2021: n=1,604
- 2024: n=1,716

Generations:

	2021	2024
Generation Z	n=76	n=221
Millennials	n=399	n=433
Generation X	n=586	n=525
Boomers+	n=543	n=537

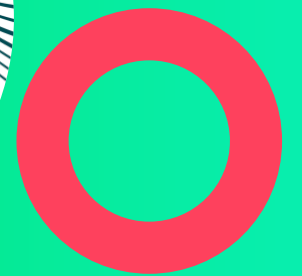
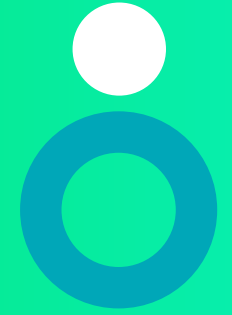
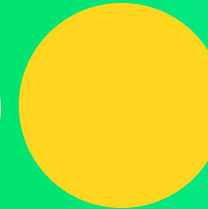
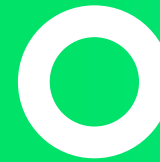
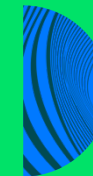
* Note, results in 2024 weighted at the total level to ensure trending to 2021

METHODOLOGY

- Mobile survey fielded September 30, 2024, to October 11, 2024




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General Ad Perceptions

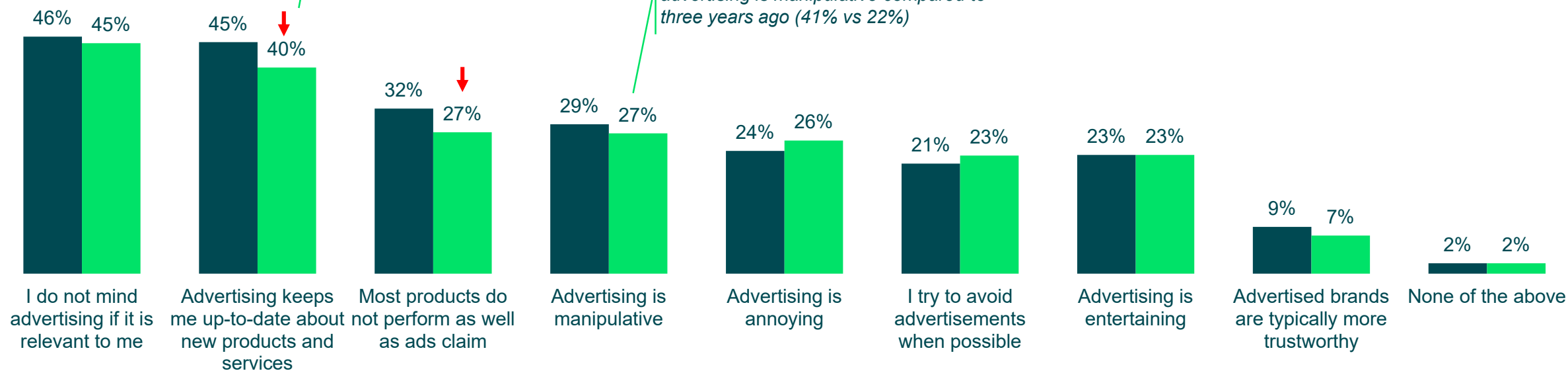
Consumers value relevant and informative advertising

Thoughts on Advertising

■ 2021 ■ 2024

In 2024, **Boomers +** and **Gen X** are significantly more likely to believe advertising is keeps them up to date about new products and services compared to other generations (46% and 44% compared to 28% and 32% for Gen Z and Millennials)

Gen Z are significantly less likely to believe advertising is manipulative compared to three years ago (41% vs 22%)



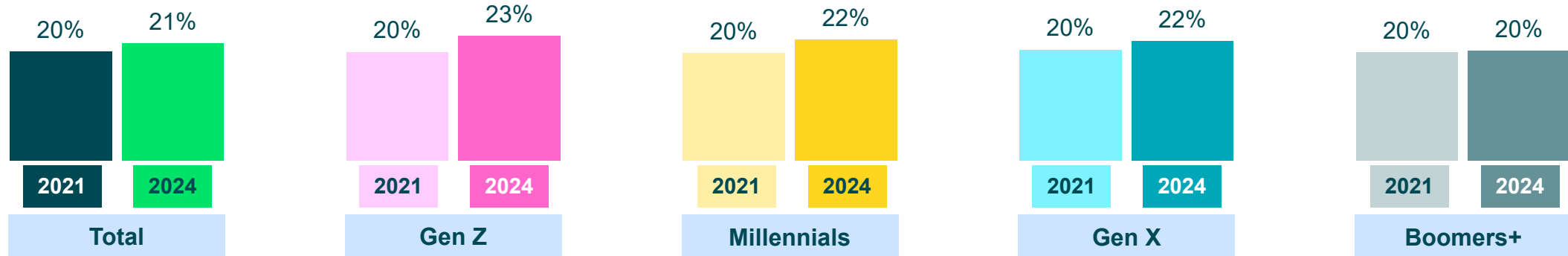
Source: Numerator Survey, Q4. As a reminder, when answering the questions in this survey, please exclude political advertising related to any election or political candidate. Also, unless otherwise noted, when we reference “advertising” please think about all forms, such as ads you may have read, seen, or heard in any format or media. Which of the following describes your thoughts on advertising?

Base: 2021 (n=1,604), 2024 (n=1,716) | Arrows indicate significant difference at 95% LOC

1 in 5 consumers continue to have favourable impressions of advertising, and 1 in 4 find advertising helpful

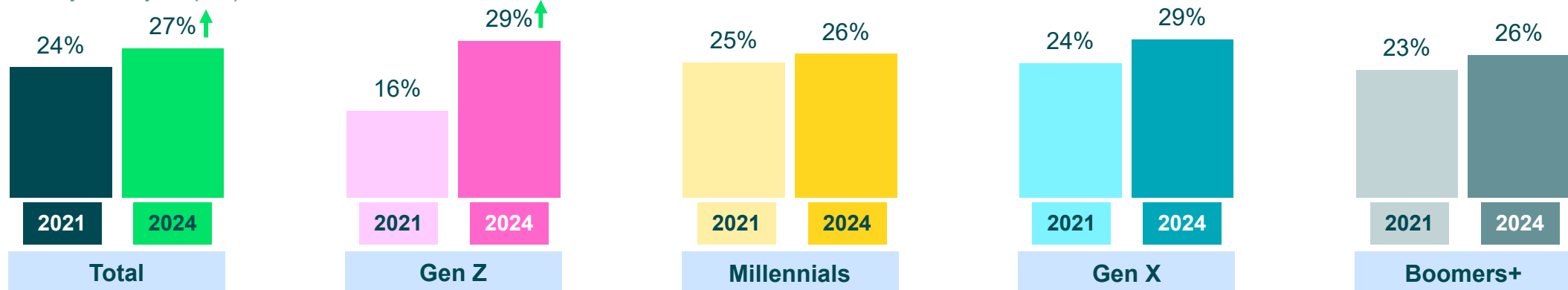
Impressions of Advertising

(T2B – Extremely + Very favourable)



Helpfulness of Advertising in Purchase Decisions

(T2B – Extremely + Very helpful)



Source: Numerator Survey, Q5_Generally speaking, how favourable is your impression of the advertising you read, see or hear? Please consider only advertising in Canada. /

Q6_Generally speaking, how helpful is the advertising you read, see or hear when considering purchasing a product or service?

Base: Total (2021/2024) (n=1,604/1,716), Generation Z (2021/2024) (n=76/221), Millennials (2021/2024) (n=399/433), Generation X (2021/2024) (n=586/525), Boomers+ (2021/2024)

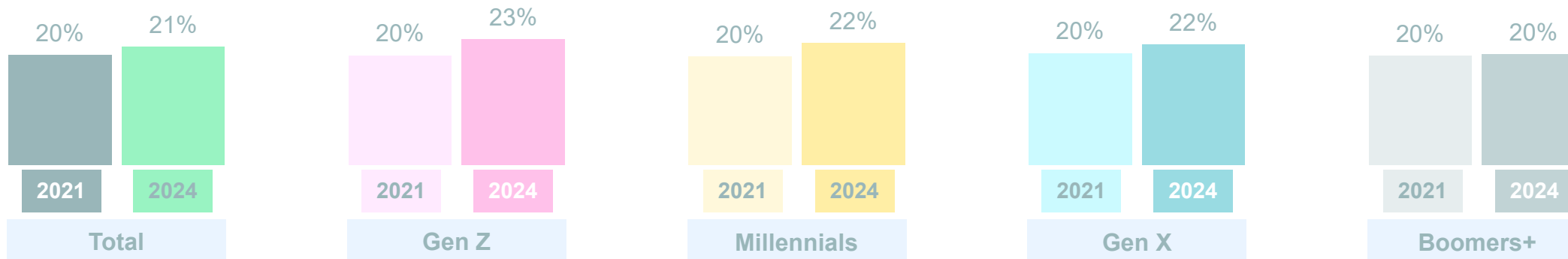
(n=543/537) / Arrows indicate significant difference at 95% LOC

1 in 5 consumers continue to have favourable impressions of advertising, and 1 in 4 find advertising helpful

Gen Z is increasingly finding advertising helpful in making purchase decisions

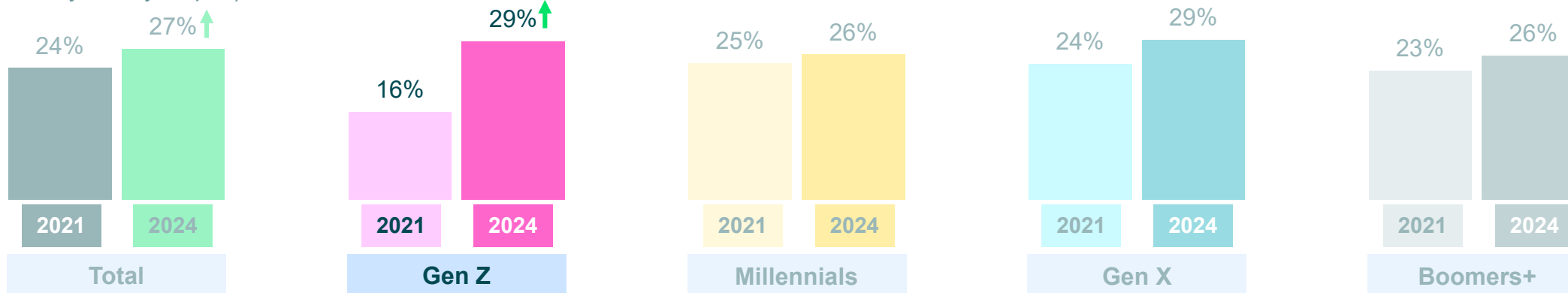
Impressions of Advertising

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(T2B – Extremely + Very helpful)



Source: Numerator Survey, Q5_Generally speaking, how favourable is your impression of the advertising you read, see or hear? Please consider only advertising in Canada. /

Q6_Generally speaking, how helpful is the advertising you read, see or hear when considering purchasing a product or service?

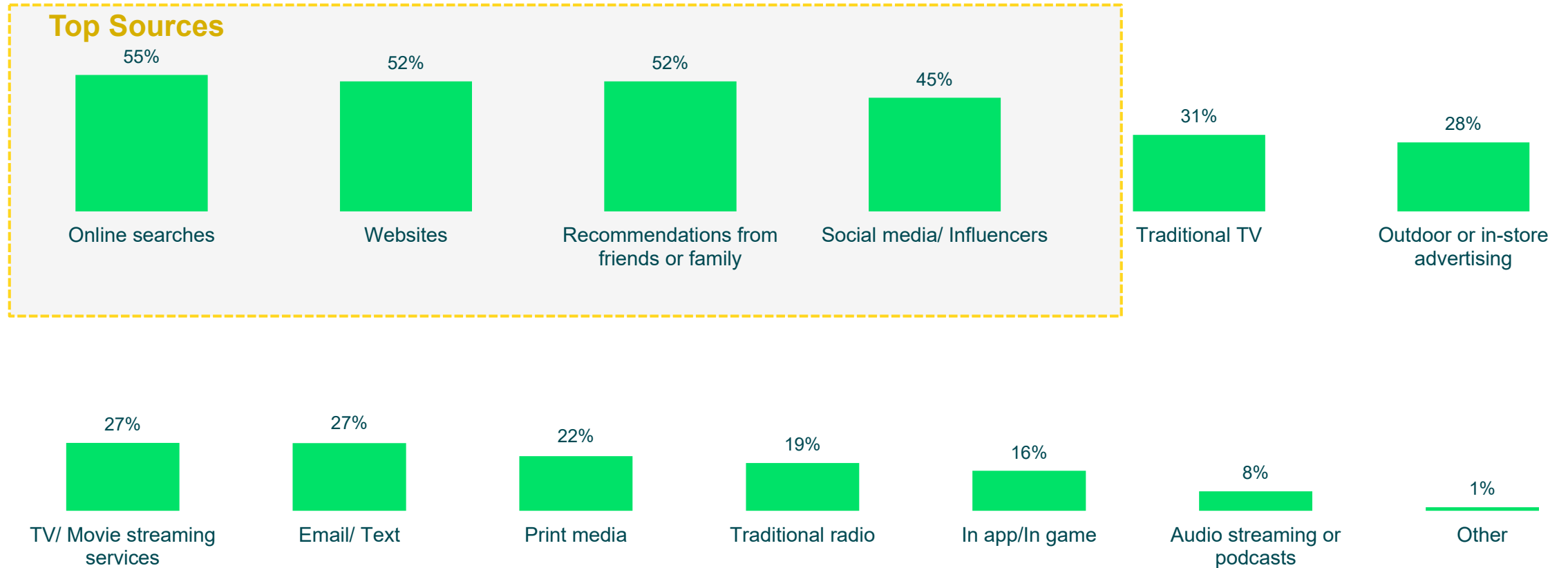
Base: Total (2021/2024) (n=1,604/1,716), Generation Z (2021/2024) (n=76/221), Millennials (2021/2024) (n=399/433), Generation X (2021/2024) (n=586/525), Boomers+ (2021/2024)

(n=543/537) / Arrows indicate significant difference at 95% LOC

Digital (e.g. online searches, websites, social) drive consumer discovery

Sources of Product, Services, and Brand Awareness

■ 2024



Source: Numerator Survey, Q3_How do you typically learn about products, services, and brands that you might purchase?
Base: 2021 (n=1,604), 2024 (n=1,716)
Results not trended to '21 due to significant changes to survey

Younger generations are more likely to favour digital channels, especially social media

Sources of Product, Services, and Brand Awareness

	Gen Z (a)	Millennials (b)	Gen X (c)	Boomers + (d)
	2024	2024	2024	2024
Online searches	54%	60% d	56% d	48%
Websites	50%	49%	58% abd	49%
Recommendations from friends or family	44%	47%	57% ab	54% ab
Social media/Influencers	57% cd	55% cd	46% d	34%
Traditional TV	12%	19% a	33% ab	43% abc
Outdoor or in-store advertising	26%	25%	28%	30%
TV/Movie streaming services	21%	27%	29% a	28%
Email/Text	22%	28%	26%	28%
Print media	7%	14% a	21% ab	33% abc
Traditional radio	7%	17% a	23% ab	20% a
In app/In game	19% d	20% d	17% d	10%
Audio streaming or podcasts	13% cd	11% d	7% d	4%
Other	0%	2%	2%	1%

Source: Numerator Survey, Q3_How do you typically learn about products, services, and brands that you might purchase?

Base: Generation Z (2021/2024) (n=76/221), Millennials (2021/2024) (n=399/433), Generation X (2021/2024) (n=586/525), Boomers+ (2021/2024) (n=543/537)

Letters indicate significant difference at 95% LOC

Younger generations are more likely to favour digital channels, especially social media, while more mature generations still rely on traditional media

Sources of Product, Services, and Brand Awareness

	Gen Z (a)	Millennials (b)	Gen X (c)	Boomers + (d)
	2024	2024	2024	2024
Online searches	54%	60% d	56% d	48%
Websites	50%	49%	58% abd	49%
Recommendations from friends or family	44%	47%	57% ab	54% ab
Social media/Influencers	57% cd	55% cd	46% d	34%
Traditional TV	12%	19% a	33% ab	43% abc
Outdoor or in-store advertising	26%	25%	28%	30%
TV/Movie streaming services	21%	27%	29% a	28%
Email/Text	22%	28%	26%	28%
Print media	7%	14% a	21% ab	33% abc
Traditional radio	7%	17% a	23% ab	20% a
In app/In game	19% d	20% d	17% d	10%
Audio streaming or podcasts	13% cd	11% d	7% d	4%
Other	0%	2%	2%	1%

Source: Numerator Survey, Q3_How do you typically learn about products, services, and brands that you might purchase?

Base: Generation Z (2021/2024) (n=76/221), Millennials (2021/2024) (n=399/433), Generation X (2021/2024) (n=586/525), Boomers+ (2021/2024) (n=543/537)

Letters indicate significant difference at 95% LOC

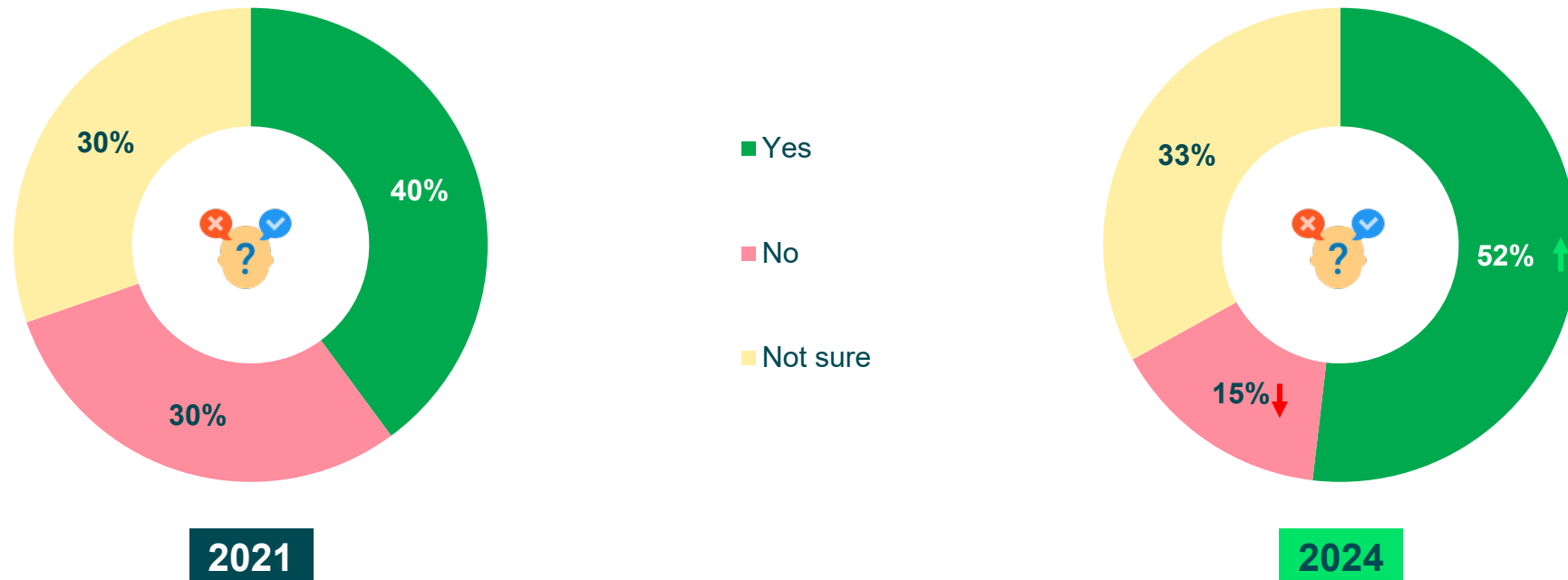


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Trust and Acceptability of Ads

There has been a significant rise in consumers who believe they have engaged with a misleading ad (untruthful, inaccurate, misleading) vs 2021

Experience with Misleading Advertising



Source: Numerator Survey, Q11_Have you read, seen or heard any advertising of any kind that you thought was untruthful, inaccurate or misleading?
Base: 2021 (n=1,604), 2024 (n=1,716)
Arrows indicate significant difference at 95% LOC

Across generations, more people report they have come across a misleading ad

Experience with Misleading Advertising

	Generation Z		Millennials		Generation X		Boomers+	
	2021	2024	2021	2024	2021	2024	2021	2024
Yes	49%	52%	41%	58% ↑	40%	54% ↑	38%	45% ↑
No	32%	19% ↓	31%	19% ↓	30%	12% ↓	29%	13% ↓
Not Sure	20%	29%	29%	23% ↓	30%	34%	34%	42% ↑

Source: Numerator Survey, Q11_Have you read, seen or heard any advertising of any kind that you thought was untruthful, inaccurate or misleading?
 Base: Generation Z (2021/2024) (n=76/221), Millennials (2021/2024) (n=399/433), Generation X (2021/2024) (n=586/525), Boomers+ (2021/2024) (n=543/537)
 Arrows indicate significant difference at 95% LOC

Trust in Advertising Across Media Channels

(Top 2 Box: Extremely + Very truthful/accurate)

	Total	Gen Z (a)	Millennials (b)	Gen X (c)	Boomers+ (d)
	2024	2024	2024	2024	2024
Recommendations from friends or family	58%	55%	59%	60%	55%
Online searches	26%	32% cd	31% cd	24%	20%
Traditional radio	21%	27% d	23% d	21% d	16%
Print media	21%	24% d	21%	22%	18%
Websites	19%	24% d	22% d	19% d	14%
Outdoor or in-store advertising	19%	19%	22% d	19%	16%
Traditional TV	17%	23% d	18% d	18% d	14%
TV/Movie streaming services	17%	19% d	22% cd	17%	12%
Email/Text	15%	20% cd	19% cd	13%	12%
Audio streaming or podcasts	15%	22% cd	20% cd	13% d	9%
Social media/Influencers	13%	24% cd	20% cd	11% d	6%
In app/In game	10%	14% d	14% d	10% d	7%

Source: Numerator Survey, Q7_TOP 2 BOX_Thinking about advertising across different types of media, how truthful/accurate do you think the advertising you read, see or hear is for each of the following?

Base: Total (2024) (n=1,716), Generation Z (2024) (n=221), Millennials (2024) (n=433), Generation X (2024) (n=525), Boomers+ (2024) (n=537)

Results not trended to '21 due to significant changes to survey / Letters indicate significant difference at 95% LOC

Perceived Truthfulness of Advertising Across Categories

(Top 2 Box: Extremely + Very truthful/accurate)

	Total	Gen Z (a)	Millennials (b)	Gen X (c)	Boomers+ (d)
	2024	2024	2024	2024	2024
Grocery stores	31%	39% cd	33%	30%	27%
Prescribed medications and vaccines	30%	36% bc	27%	27%	32%
Brick-and-mortar retail stores	26%	29%	27%	27%	23%
Food and beverage	24%	32% cd	26% d	24%	21%
Over-the-counter health products	24%	33% cd	27% d	22%	21%
Financial services including banks and insurance	23%	31% bcd	23%	21%	23%
Alcoholic beverages	23%	27% d	26% d	23%	19%
Food-related service	23%	29% cd	27% d	22%	18%
Alternative treatment practitioners and therapies	23%	26%	26% d	23%	20%
Energy	19%	28% bcd	20%	17%	16%
Automotive & cars	17%	25% cd	20% d	18% d	13%
Online retailers	17%	19% d	22% cd	17% d	12%
Gambling, casinos, online gambling	13%	21% cd	16% d	13% d	8%

Source: Numerator Survey, Q8_TOP 2 BOX_Thinking about different kinds of products and services that are advertised, how truthful/accurate do you think the advertising you read, see or hear is for each of the following categories?

Base: Total (2024) (n=1,716), Generation Z (2024) (n=221), Millennials (2024) (n=433), Generation X (2024) (n=525), Boomers+ (2024) (n=537)

Results not trended to '21 due to significant changes to survey / Letters indicate significant difference at 95% LOC

Younger generations view AI generated content more positively than other generations

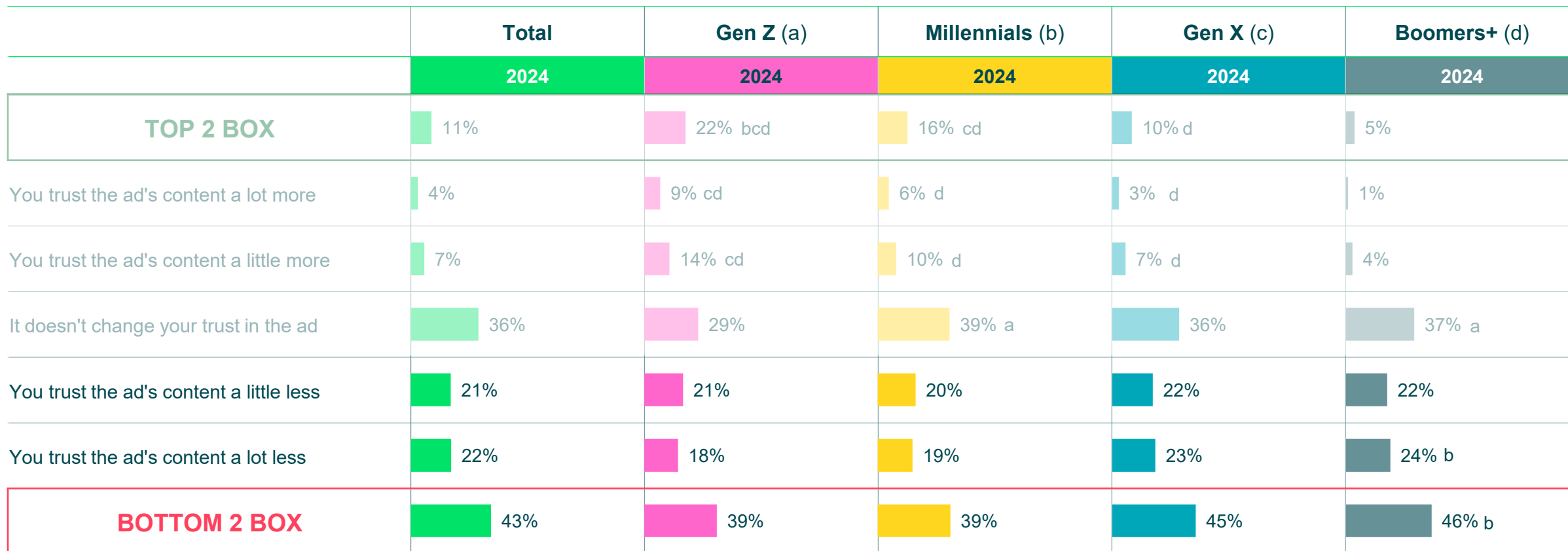
Perceptions of AI-Generated Ad Content

	Total	Gen Z (a)	Millennials (b)	Gen X (c)	Boomers+ (d)
	2024	2024	2024	2024	2024
TOP 2 BOX	11%	22% bcd	16% cd	10% d	5%
You trust the ad's content a lot more	4%	9% cd	6% d	3% d	1%
You trust the ad's content a little more	7%	14% cd	10% d	7% d	4%
It doesn't change your trust in the ad	36%	29%	39% a	36%	37% a
You trust the ad's content a little less	21%	21%	20%	22%	22%
You trust the ad's content a lot less	22%	18%	19%	23%	24% b
BOTTOM 2 BOX	43%	39%	39%	45%	46% b

Source: Numerator Survey, Q9_Artificial intelligence (or AI) can be used in many ways by the advertising industry. For this question, think about the use of AI to create the content of an advertisement, meaning the images, pictures, sounds, script and/or text that is presented to you. If you knew that AI was used to create the content of an ad, what would be your reaction to it? / Base: Total (2024) (n=1,716), Generation Z (2024) (n=221), Millennials (2024) (n=433), Generation X (2024) (n=525), Boomers+ (2024) (n=537)
 Results not trended to '21 – new question / Letters indicate significant difference at 95% LOC

Younger generations view AI generated content more positively than other generations, but as a whole AI content is less trusted

Perceptions of AI-Generated Ad Content



Source: Numerator Survey, Q9_Artificial intelligence (or AI) can be used in many ways by the advertising industry. For this question, think about the use of AI to create the content of an advertisement, meaning the images, pictures, sounds, script and/or text that is presented to you. If you knew that AI was used to create the content of an ad, what would be your reaction to it? / Base: Total (2024) (n=1,716), Generation Z (2024) (n=221), Millennials (2024) (n=433), Generation X (2024) (n=525), Boomers+ (2024) (n=537)
 Results not trended to '21 – new question / Letters indicate significant difference at 95% LOC

Only about 1/3 of consumers trust environmental claims in ads

Perceptions of Environmental Claims in Ads

	Total	Gen Z (a)	Millennials (b)	Gen X (c)	Boomers+ (d)
	2024	2024	2024	2024	2024
TOP 2 BOX	32%	30%	34%	34%	29%
I am very likely to trust the ad	3%	7% cd	4%	3%	2%
I am somewhat likely to trust the ad	29%	23%	31% a	31% a	26%
I am somewhat likely not to trust the ad	27%	23%	29%	25%	30% a
I am very likely not to trust the ad	13%	14%	11%	13%	15%
BOTTOM 2 BOX	40%	36%	40%	38%	44% ac
It depends on what I know about the advertiser, the product, or service	20%	21%	17%	20%	21%

Source: Numerator Survey, Q10_When you read, see or hear an ad claiming that the advertiser's product or service is in some way environmentally friendly, how likely (if at all) are you to trust the ad?

Base: Total (2024) (n=1,716), Generation Z (2024) (n=221), Millennials (2024) (n=433), Generation X (2024) (n=525), Boomers+ (2024) (n=537)

Results not trended to '21 – new question / Letters indicate significant difference at 95% LOC

Only about 1/3 of consumers trust environmental claims in ads, more remain skeptical or unsure

Perceptions of Environmental Claims in Ads

	Total	Gen Z (a)	Millennials (b)	Gen X (c)	Boomers+ (d)
	2024	2024	2024	2024	2024
TOP 2 BOX	32%	30%	34%	34%	29%
I am very likely to trust the ad	3%	7% cd	4%	3%	2%
I am somewhat likely to trust the ad	29%	23%	31% a	31% a	26%
I am somewhat likely not to trust the ad	27%	23%	29%	25%	30% a
I am very likely not to trust the ad	13%	14%	11%	13%	15%
BOTTOM 2 BOX	40%	36%	40%	38%	44% ac
It depends on what I know about the advertiser, the product, or service	20%	21%	17%	20%	21%

Source: Numerator Survey, Q10_When you read, see or hear an ad claiming that the advertiser's product or service is in some way environmentally friendly, how likely (if at all) are you to trust the ad?

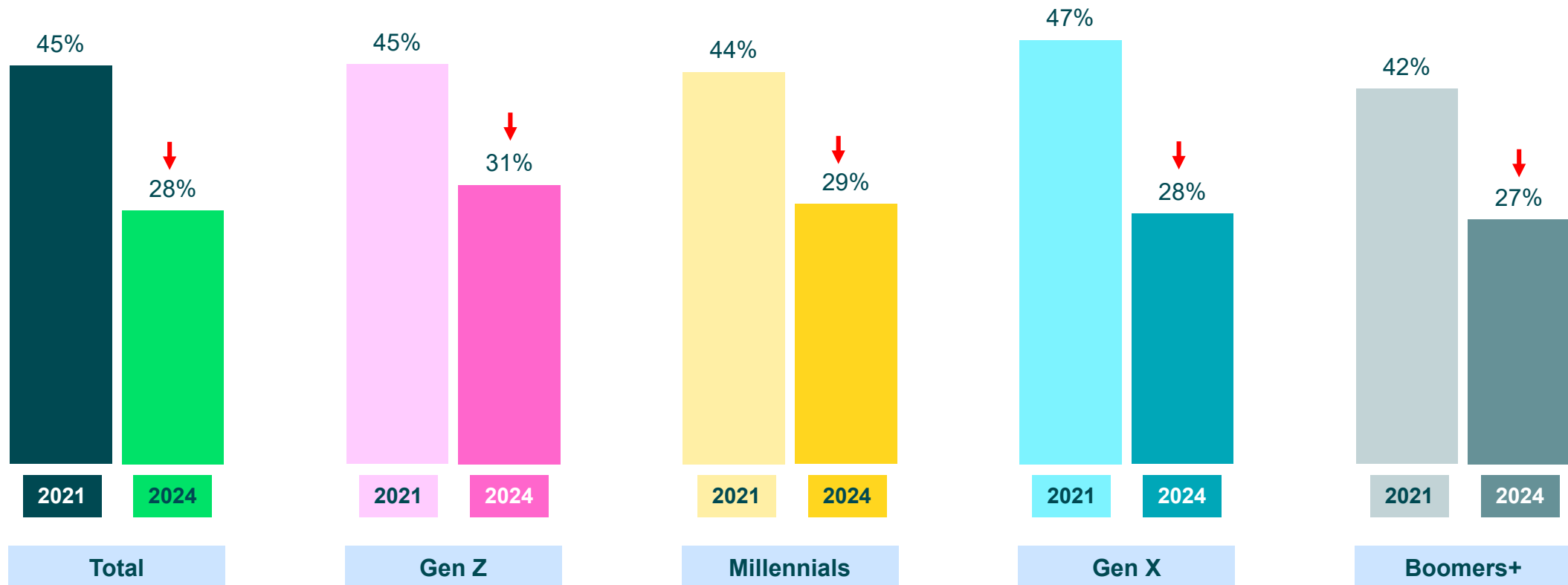
Base: Total (2024) (n=1,716), Generation Z (2024) (n=221), Millennials (2024) (n=433), Generation X (2024) (n=525), Boomers+ (2024) (n=537)

Results not trended to '21 – new question / Letters indicate significant difference at 95% LOC

Perception of acceptability of Canadian advertising in terms of truthfulness and accuracy has decreased across all age groups

Acceptable Canadian Advertising Content

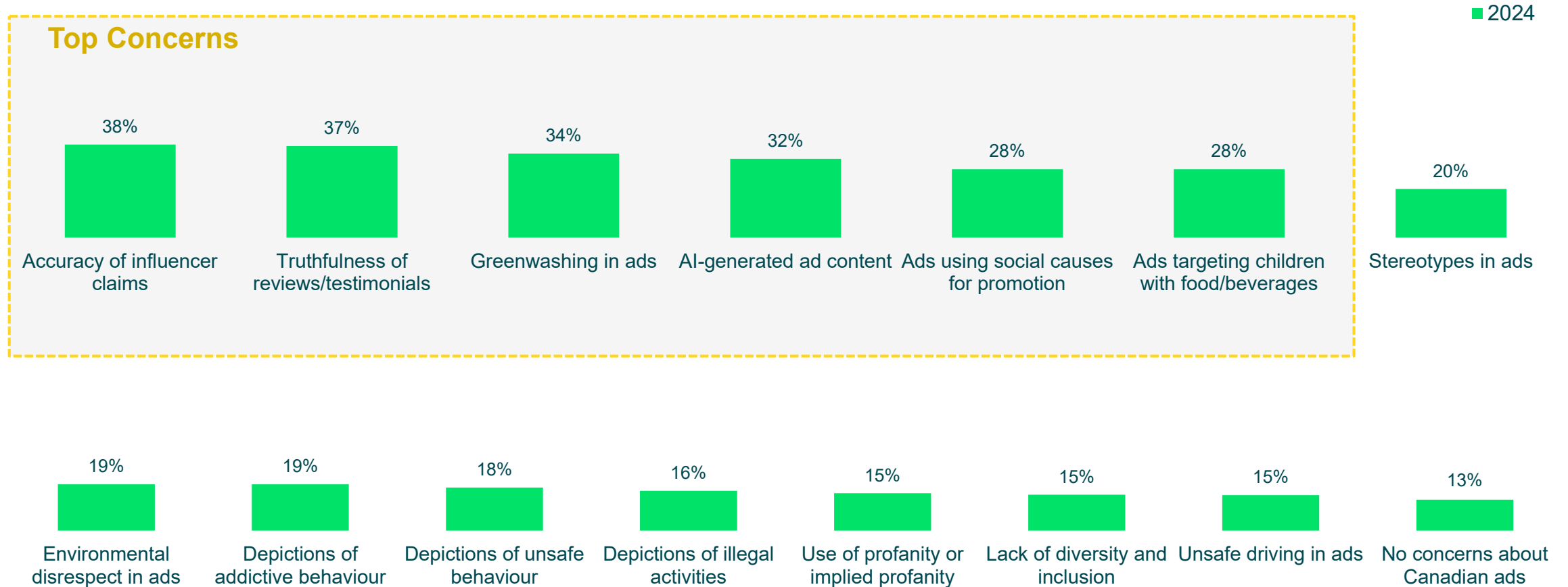
(Top 2 Box: All + Most)



Source: Numerator Survey, Q13_How much of the Canadian advertising to which you are exposed do you consider acceptable because it is truthful, accurate and not misleading?
Base: Total (2021/2024) (n=1,604/1,716), Generation Z (2021/2024) (n=76/221), Millennials (2021/2024) (n=399/433), Generation X (2021/2024) (n=586/525), Boomers+ (2021/2024) (n=543/537)

Arrows indicate significant difference at 95% LOC

Consumers' Top Concerns About Advertising



Source: Numerator Survey, Q14_Which, if any, of the following concerns you about Canadian advertising?

Base: Total (2024) (n=1,716), Generation Z (2024) (n=221), Millennials (2024) (n=433), Generation X (2024) (n=525), Boomers+ (2024) (n=537)

Omitted response: "Other, please specify"

Results not trended to '21 due to significant changes to survey

Consumers' Top Concerns About Advertising by Demographic

	Total	Gen Z (a)	Millennials (b)	Gen X (c)	Boomers+ (d)
	2024	2024	2024	2024	2024
Accuracy of influencer claims	38%	29%	33%	41% ab	41% ab
Truthfulness of reviews/testimonials	37%	30%	28%	41% ab	44% ab
Greenwashing in ads	34%	27%	32%	35% a	37% a
AI-generated ad content	32%	26%	30%	29%	39%
Ads using social causes for promotion	28%	21%	26%	27%	32% ab
Ads targeting children with food/beverages	28%	19%	26% a	26% a	34% abc
Stereotypes in ads	20%	19%	18%	21%	21%
Environmental disrespect in ads	19%	19%	17%	17%	23% bc
Depictions of addictive behaviour	19%	17%	17%	19%	22%
Depictions of unsafe behaviour	18%	19%	16%	17%	20%
Depictions of illegal activities	16%	12%	12%	16%	21% abc
Use of profanity or implied profanity	15%	15%	12%	14%	20% bc
Lack of diversity and inclusion	15%	19% d	16%	14%	13%
Unsafe driving in ads	15%	16%	11%	14%	18% b
No concerns about Canadian ads	13%	16%	11%	12%	13%

Source: Numerator Survey, Q14_Which, if any, of the following concerns you about Canadian advertising?


























Base: Total (2024) (n=1,716), Generation Z (2024) (n=221), Millennials (2024) (n=433), Generation X (2024) (n=525), Boomers+ (2024) (n=537)

Omitted response: "Other, please specify"

Misleading ads risk losing consumers as many stop purchasing and may escalate their response further

Consumer Actions Against Misleading Ads

	Total	Generation Z	Millennials	Generation X	Boomers+
YES	44%	45%	44%	45%	44%
NO	56%	55%	56%	55%	56%

	Total	Gen Z (a)	Millennials (b)	Gen X (c)	Boomers+ (d)
	2024	2024	2024	2024	2024
Yes, I stopped buying the company's product or service	 29%	 29%	 29%	 28%	 29%
Yes, I contacted the company to complain	 8%	 7%	 8%	 8%	 7%
Yes, I've filed a complaint about advertising	 8%	 9%	 7%	 9%	 8%
No, because I didn't know who to contact or what to do about it	 26%	 24%	 24%	 27%	 29%
No, because I didn't have time or interest to follow up about it	 29%	 31%	 33% d	 28%	 26%

Source: Numerator Survey, Q12_Did you do anything about the fact that you thought the ad was untruthful, inaccurate or misleading?
 Base: Total (2024) (n=888), Generation Z (2024) (n=116), Millennials (2024) (n=251), Generation X (2024) (n=282), Boomers+ (2024) (n=239)

Consumers generally believe advertising is more diverse now than five years ago, although younger generations are more likely to believe there is still a lack of diversity compared to older generations

Perceptions of Diversity in Advertising

	Total	Gen Z (a)	Millennials (b)	Gen X (c)	Boomers+ (d)
	2024	2024	2024	2024	2024
There is a notable lack of diversity, equity and inclusion in advertising	7%	13% cd	10% cd	6%	5%
There is greater diversity, equity and inclusion depicted in advertising than 5 years ago	33%	29%	31%	34%	34%
There is good representation of diversity in advertising today	28%	23%	27%	28%	30%
Depictions of diversity in advertising tend to play on stereotypes	12%	12%	13%	12%	13%
I do not notice or do not care about diversity in advertising	19%	22%	19%	19%	19%

Source: Numerator Survey, Q15_What statement best reflects your perception of the diversity of people depicted in advertising? (Inclusive of age, race, gender, sexuality, ability, etc.)
 Base: Total (2024) (n=1,716), Generation Z (2024) (n=221), Millennials (2024) (n=433), Generation X (2024) (n=525), Boomers+ (2024) (n=537)
 Results not trended to '21 – new question



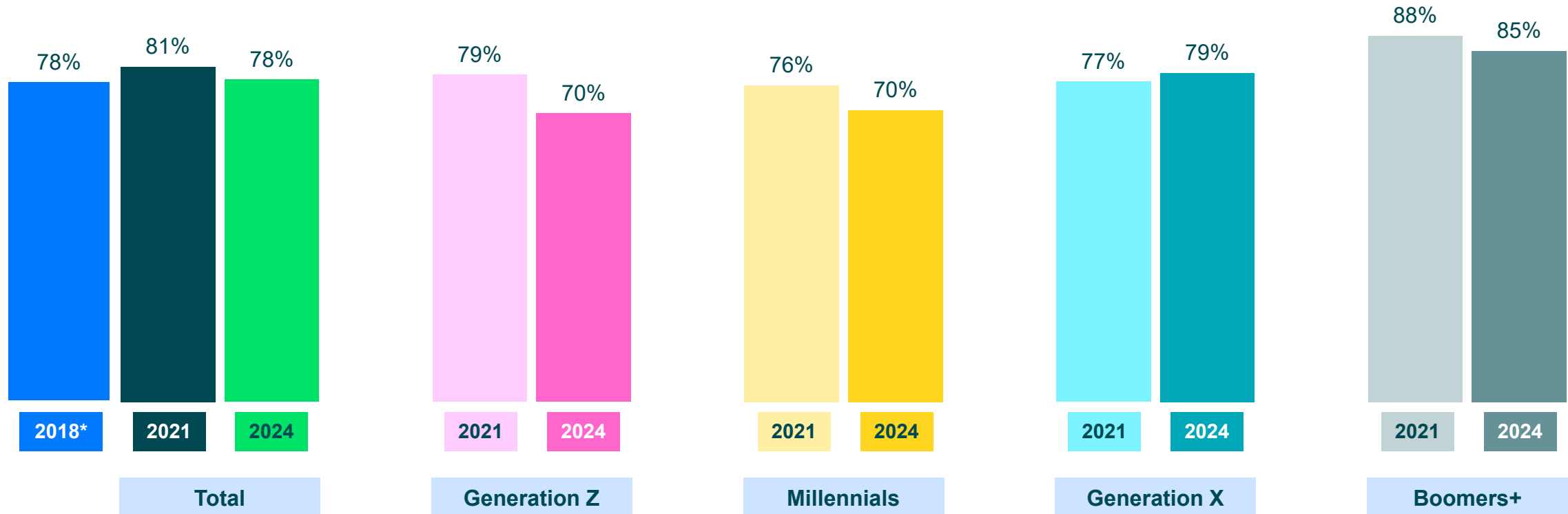
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Awareness and Impact of Ad Regulations in Canada

Most consumers recognize the importance of advertising regulations, though this opinion is held higher among older generations

Importance of Ad Rules and Regulations

(Top 2 Box: Extremely + Very Important)



Source: Numerator Survey, Q17_In your opinion, how important is it to have rules and regulations that advertisers must follow? Would you say that it is...

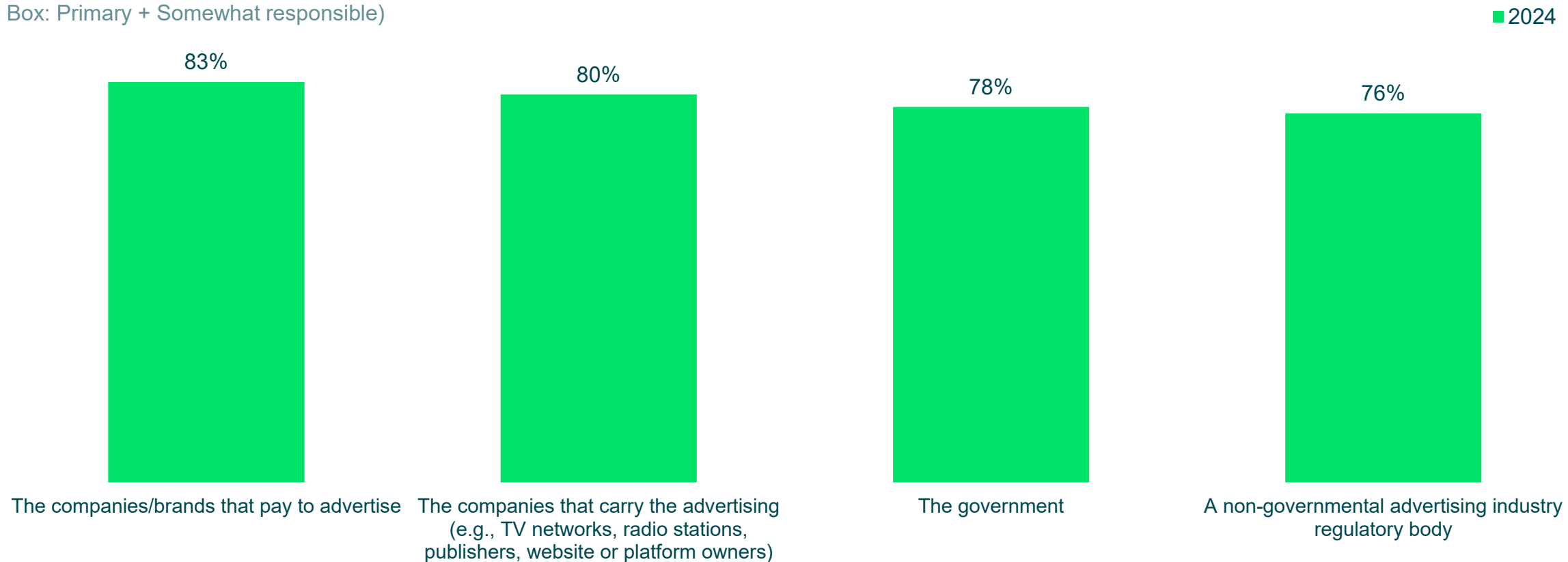
Base: Total (2018/2021/2024) (n=1,581/1,604/1,716), Generation Z (2021/2024) (n=76/221), Millennials (2021/2024) (n=399/433), Generation X (2021/2024) (n=586/525), Boomers+ (2021/2024) (n=543/537)

*Survey fielded by third party, interpret results with caution; results unavailable by generation | Trending not included due to significant changes in providers across waves

Consumers believe all parties play an important role in advertising standards

Entities Responsible for Advertising Standards

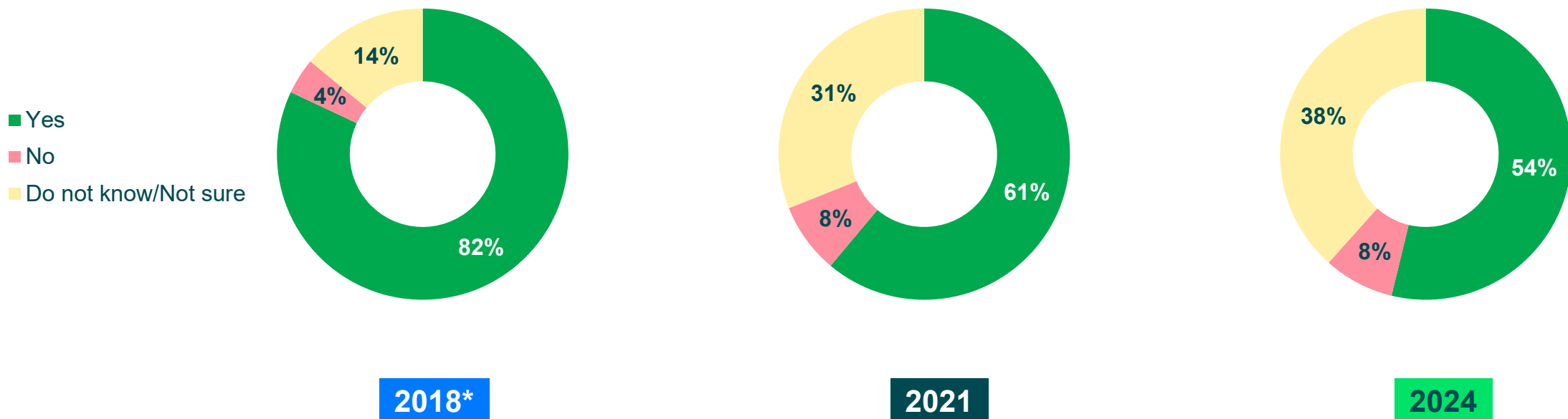
(Top 2 Box: Primary + Somewhat responsible)



Source: Numerator Survey, Q18_TOP 2 BOX_How much responsibility should the following organizations or entities have in making sure that advertising standards are upheld?
Base: Total (2024) (n=1,716), Generation Z (2024) (n=221), Millennials (2024) (n=433), Generation X (2024) (n=525), Boomers+ (2024) (n=537)
Results not trended to '21 – new question

More than half of consumers are aware of advertising regulations in Canada, however, there has been a decline in this awareness, with more people unsure about the rules compared to previous years

Knowledge of Advertising Rules and Regulations in Canada



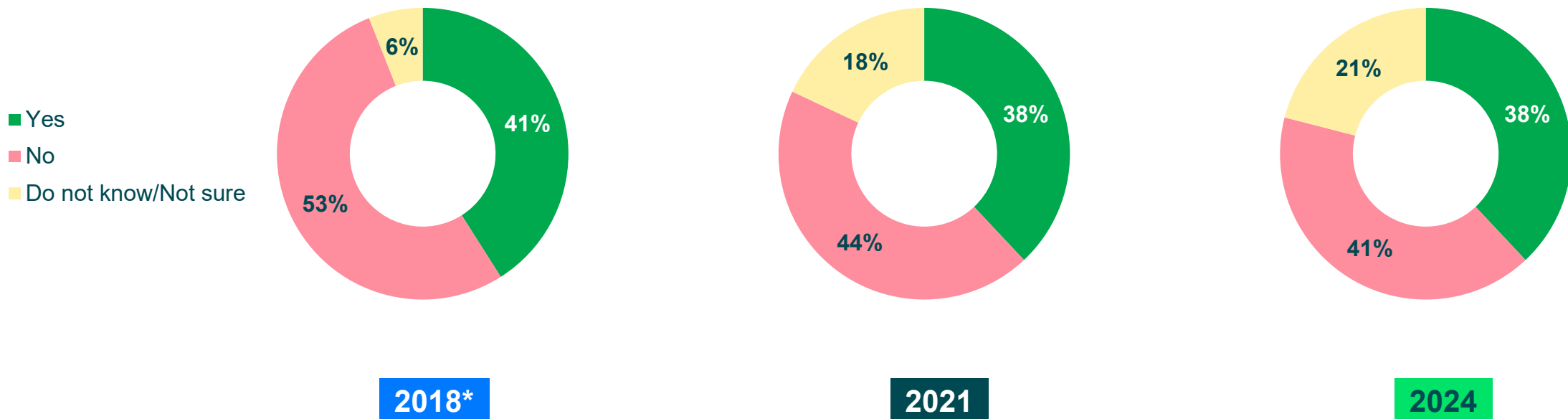
Source: Numerator Survey, Q16_To the best of your knowledge, are there rules and regulations about advertising that advertisers must follow in Canada?

Base: Total (2018/2021/2024) (n=1,581/1,604/1,716)

*Survey fielded by third party, interpret results with caution | Trending not included due to significant changes in providers across waves

Knowledge of the *Canadian Code of Advertising Standards* is low across all generations, with many supporting it but still unsure about its specifics

Awareness of the *Canadian Code of Advertising Standards*

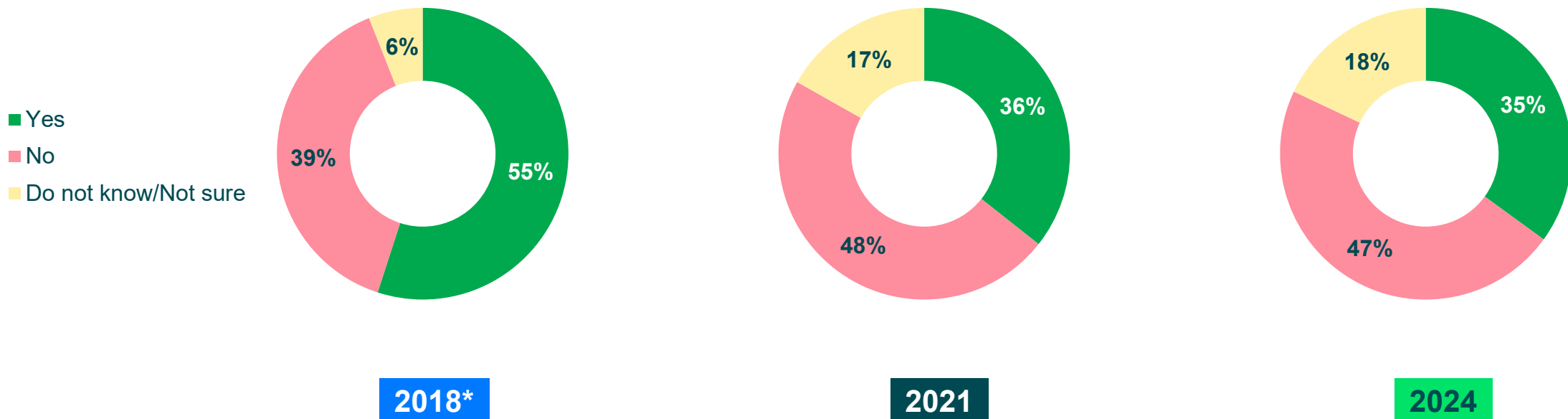


Source: Numerator Survey, Q19_The Canadian Code of Advertising Standards is a code that is broadly supported by the Canadian advertising industry and helps ensure ads in all media are acceptable on the basis of being, among other things, truthful, fair, accurate and not offensive. Before participating in this survey, were you aware of the Canadian Code of Advertising Standards?

Base: 2018 (n=1,581), 2021 (n=1,604), 2024 (n=1,716) | Trending not included due to significant changes in providers across waves

Awareness of Ad Standards is even lower, with many consumers still unaware of the organization, suggesting an opportunity for increasing visibility

Awareness of Ad Standards (Advertising Standards Canada)

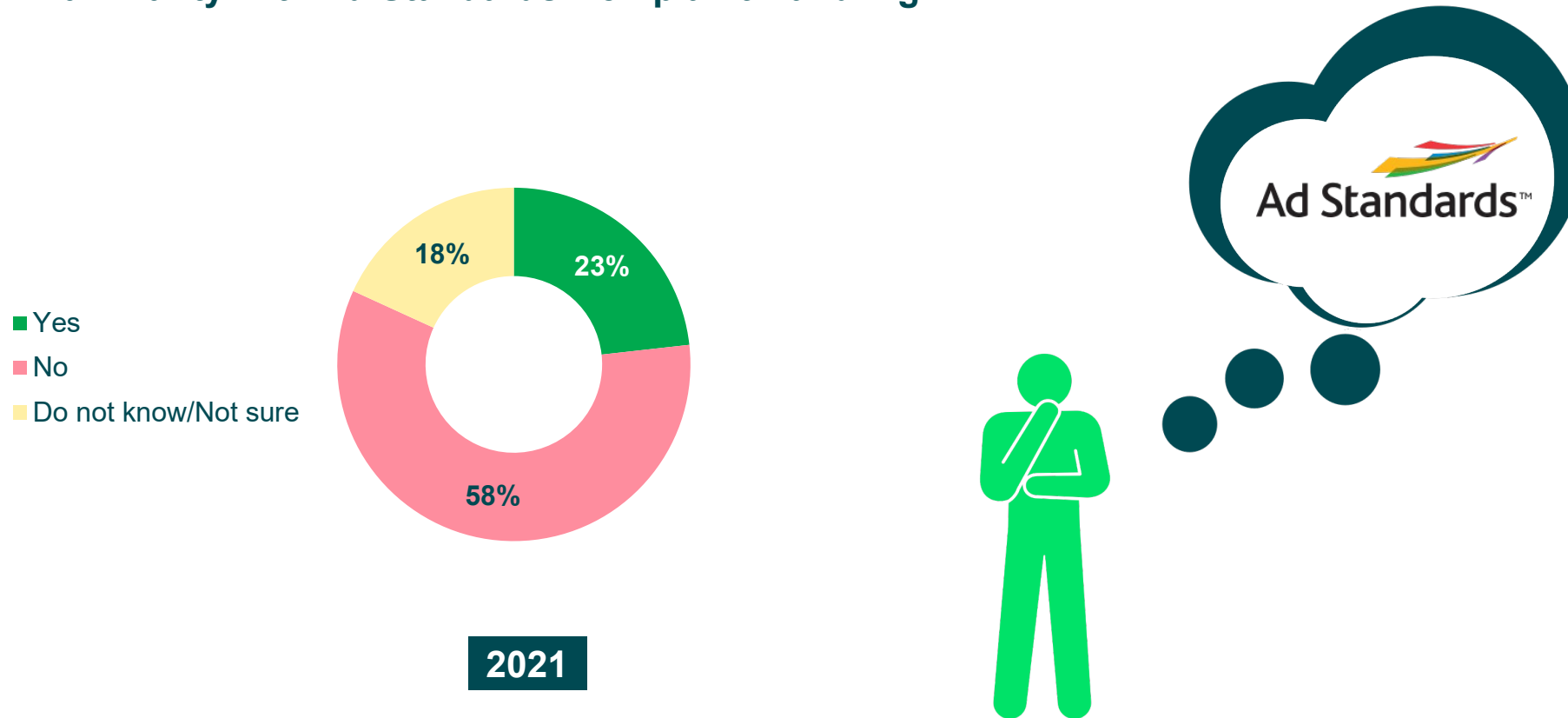


Source: Numerator Survey, Q20_The Canadian Code of Advertising Standards is administered by a body called Ad Standards (Advertising Standards Canada), supported by many of Canada's leading advertising industry companies and organizations. Members agree to uphold and support The Canadian Code of Advertising Standards through a self-regulatory framework administered by Ad Standards. Before participating in this survey, had you heard of Ad Standards?

Base: 2018 (n=1,581), 2021 (n=1,604), 2024 (n=1,716) | *Survey fielded by third party, interpret results with caution | Trending not included due to significant changes in providers across waves

Given the lower familiarity with Ad Standards, it is not surprising that members of the public are largely unfamiliar with the process for administering complaints

Familiarity with Ad Standards Complaint Handling

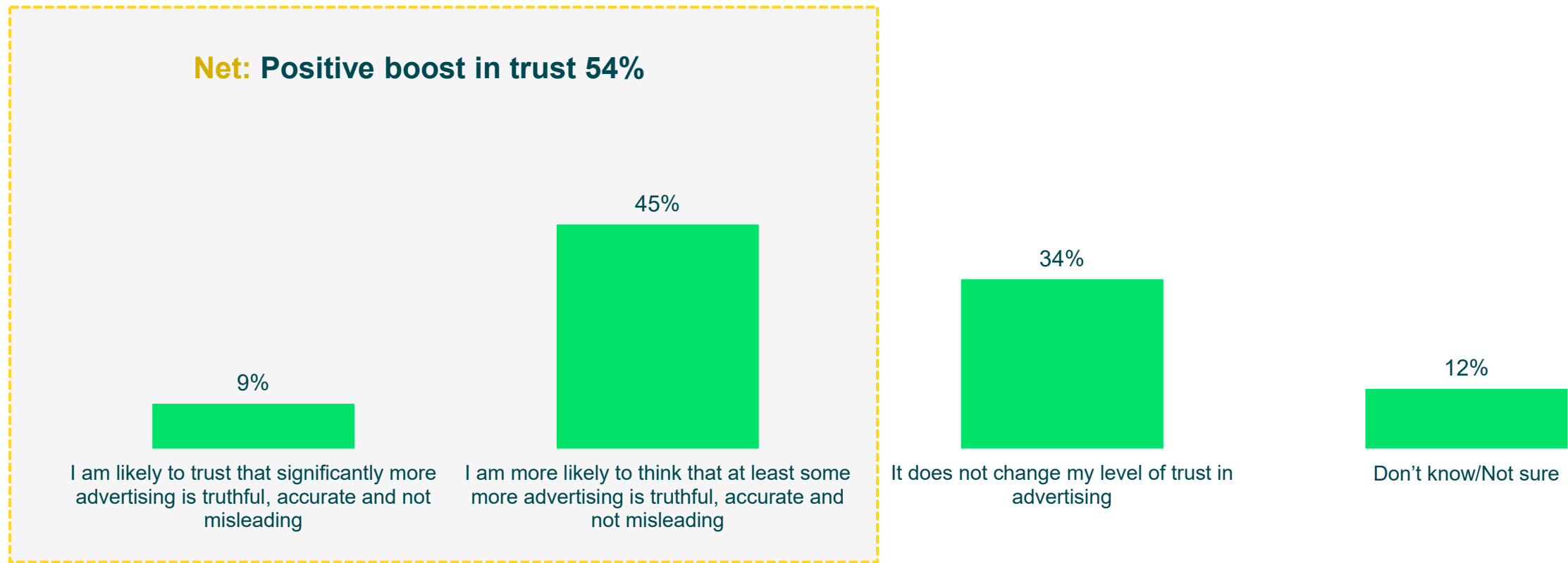


Source: Numerator Survey, Q21. Before participating in this survey, were you familiar with Ad Standards' process for administering consumer complaints?
Base: Total (2023/2024) (n=1,604/1,716), Generation Z (2024) (n=221), Millennials (2024) (n=433), Generation X (2024) (n=525), Boomers+ (2024) (n=537)

Knowing about the Ad Standards process boosts trust in advertising, with most consumers believing it makes ads more truthful and accurate

Impact of Awareness of Complaint Process on Ad Trust

■ 2024

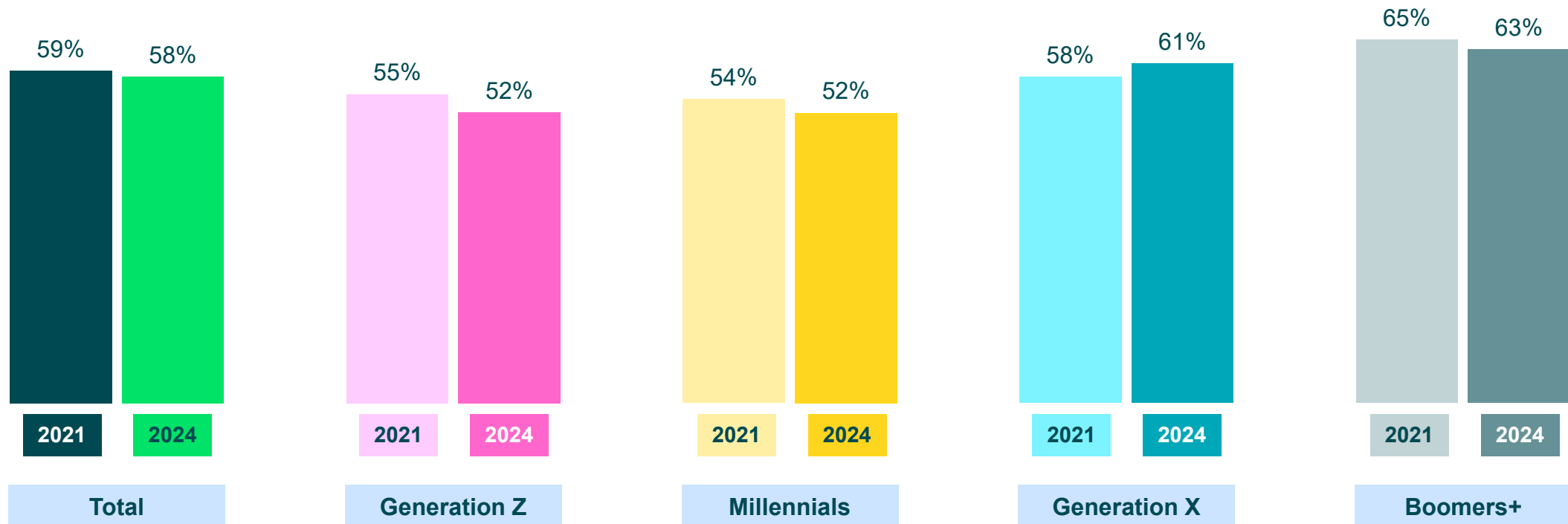


Source: Numerator Survey, Q22_Knowing about this process, does this change your level of trust in the advertising that you see?
Base: Total (2024) (n=1,312), Generation Z (2024) (n=159), Millennials (2024) (n=337), Generation X (2024) (n=392), Boomers+ (2024) (n=424)

Consumers across all generations are more likely to trust an advertisement if they know the advertiser is a member of Ad Standards

Trust in Ads from Ad Standards Members

(Top 2 Box: Much + Somewhat more likely to trust the ad)



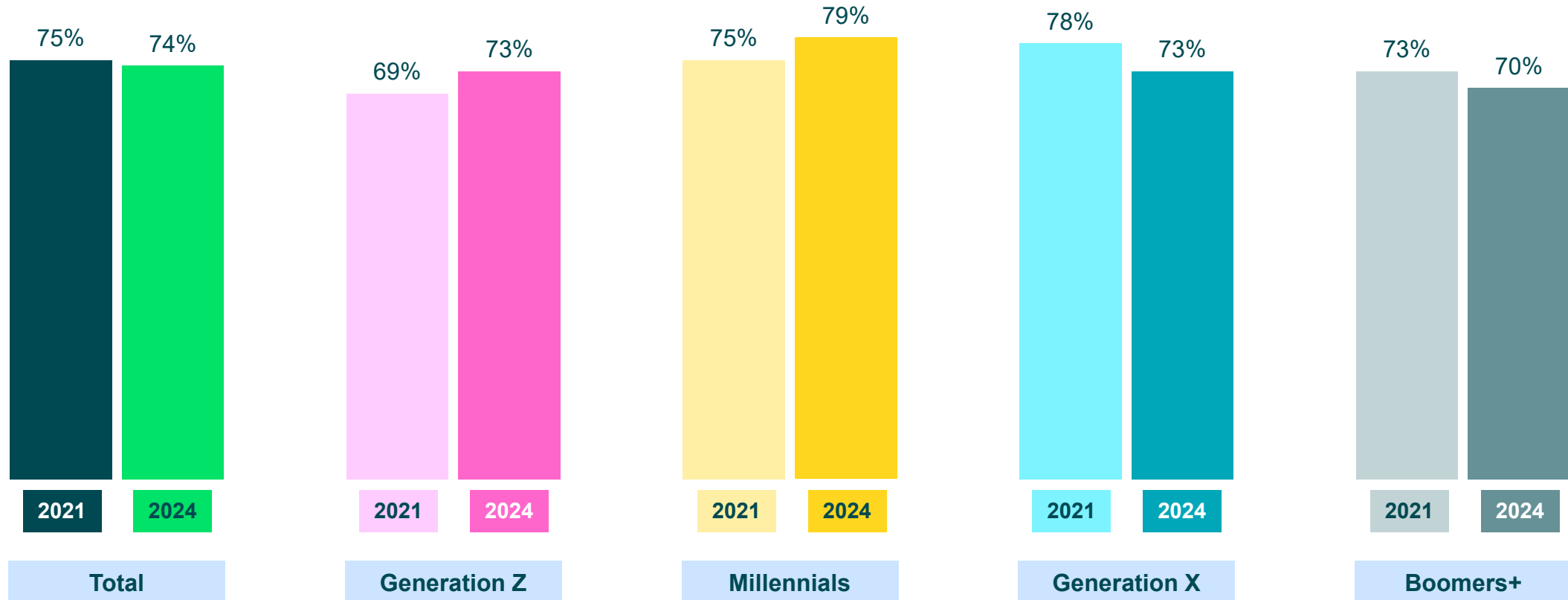
Source: Numerator Survey, Q23_Would you be more or less likely to trust an advertisement if you knew the advertiser was a member of Ad Standards?

Base: Total (2021/2024) (n=1,604/1,716), Generation Z (2021/2024) (n=76/221), Millennials (2021/2024) (n=399/433), Generation X (2021/2024) (n=586/525), Boomers+ (2021/2024) (n=543/537)

Consumers agree that Ad Standards continues to perform well against expectations for upholding advertising standards

Rating of Ad Standards' Performance

(Top 3 Box: Outstanding, Very Good, Good)



Source: Numerator Survey, Q26_How would you rate Ad Standards' performance in terms of ensuring advertising standards are upheld?

Base: Total (2021/2024) (n=1,604/1,716), Generation Z (2021/2024) (n=76/221), Millennials (2021/2024) (n=399/433), Generation X (2021/2024) (n=586/525), Boomers+ (2021/2024) (n=543/537)



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Summary Conclusions

Key Takeaways From Ad Standards

- Trust is key, but declining – not unique to advertising. **Building trust is more important than ever before.**
- **Knowing about Ad Standards** – including knowing about our work under the *Canadian Code of Advertising Standards* – **builds trust**. That is our mission: to build trust in advertising through fostering truthful, fair and accurate advertising.
- There's **a need for greater awareness** of what Ad Standards does. This survey helps us understand consumers' perspectives.
- Watch for a new consumer awareness campaign coming forward in 2025-2026.

For those looking for ways to build trust...

Ad Standards has resources both in place and in development.

- Our **year-on-year surveys** show consumers are more likely to trust ads from an Ad Standards member.
- **Influencer Disclosure Guidelines** are regularly refreshed and will be reviewed again in 2025 for updates.
- Watch for further thought leadership on **AI in advertising**, as Ad Standards participates as a founding member of the **International Council for Advertising Self-Regulation's Global Think Tank**
- **Environmental claims/greenwashing** – Stay tuned for more from Ad Standards as the Competition Bureau moves forward with their updated guidelines.

About Ad Standards

We are:

- an **advertising self-regulatory** organization
- a **national** organization
- **independent** of government or any corporation
- **not-for-profit**
- **distinct in our mandate** from industry associations
- Canada's member of the **International Council for Advertising Self-Regulation (ICAS)**



Ad Standards™



Normes
de la publicité^{MC}

THANK YOU!



Numerator



Ad Standards™

The Ad Standards logo icon consists of three overlapping, curved lines in red, orange, and yellow, resembling a stylized 'A' or a signal.

Catherine Bate

President & CEO

Ad Standards

catherine.bate@adstandards.ca

Tony Moguel

Sr. Manager, Survey

tony.moguel@numerator.com

