WEBINAR

State of Advertising Perceptions & Attitudes

April 2022
Numerator’s solution suite provides a unique, comprehensive view of consumer buying before, during, and after purchase.

**WHY: PATH TO PURCHASE DATA**

- Ad Intel
- Promo Intel
- Surveys

**WHAT: PURCHASE DATA**

- People Insights
- Shopper Insights
- Brand Insights
- New Item Insights

**INFLUENCERS**

**OPINIONS**

**BEHAVIOURS**

Numerator helps brands understand what consumers buy and why.
Our modern Consumer Panel has higher engagement and compliance.

Gamified consumer app (Receipt Hog) 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 for legacy panels)

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

Improved Shopper Info
Demographics, Psychographics and Dynamic
Numerator makes it easy to quickly capture the purchase then understand the ‘why’ from verified purchasers, creating Canada’s most representative and holistic consumer panel.

1. Capture **BEHAVIOURAL** purchase metrics with a seamless mobile receipt capture.

2. Intercept shopper **ATTITUDES** with mobile surveys to understand the ‘why behind the buy’.
SURVEY ANALYSIS

Study Overview, Executive Summary & Recommendations
Ad Standards Study Overview

BACKGROUND

Ad Standards was interested in conducting survey research among the general population in Canada to understand consumer attitudes toward advertising in four general topic areas:

1. Acceptability of Advertising
2. Commercial brands and Industry sectors
3. What is considered unacceptable and offensive
4. Importance of Advertising Rules and Regulations

NOTE: The Ad Standards team has conducted similar research in previous years with different research suppliers.

METHODOLOGY

Sample Parameters & Quota Scheme:

• N = 1604 completes
• Sample: adults (aged 18 years of age or older) representing a representative mix of the Canadian population by Age/Generation, Gender, and Region
• Field Dates: Fall 2021
## Executive Summary & Recommendations

<table>
<thead>
<tr>
<th>INSIGHTS</th>
<th>RECOMMENDATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Most consumers learn about new products, services, and brands via online advertising - but this platform is also the least trusted. Word of mouth, commercials/previews during a TV show or movie, and print media (which is especially influential for Boomers+) are the next most influential touchpoints. Nearly half of consumers do not mind advertising relevant to them, citing that it keeps them informed about new products. However, Gen Z and Millennials are more likely to have negative feelings towards advertising.</td>
<td>Find ways to build faith in online advertising. Don’t forget about commercials/previews and print media, as these are important for many consumers (esp. older generations). Make sure ads are relevant to the target audience(s) &amp; continue to inform consumers about new products/services.</td>
</tr>
</tbody>
</table>
Executive Summary & Recommendations

**INSIGHTS**

2. 4 in 10 have encountered unacceptable advertising, mainly online – this is very risky, as around 3 in 4 stopped buying the product/service after experiencing it.

Gen Z and Millennials are more likely to be concerned about misinterpretations in advertising, with racial diversity/equality/inclusion a key concern for them.

Conversely, consumers feel most positively about statements of being environmentally friendly, curbing sexual harassment, and promoting diversity/equality/inclusion.

**RECOMMENDATIONS**

Companies need to ensure their advertising is not unacceptable, esp. for younger generations, as most consumers will abandon products/services with unacceptable ads.

Ensure that messaging is tailored to focus on positively associated statements, while ensuring advertising is not misinterpreted (esp. re: diversity/equality/inclusion).
### Executive Summary & Recommendations

<table>
<thead>
<tr>
<th>INSIGHTS</th>
<th>RECOMMENDATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is very important for many consumers, especially Boomers+, that advertisers follow rules/regulations.</td>
<td>Address the lack of awareness about the Canadian Code of Ad Standards, esp. in the Quebec and Atlantic regions,</td>
</tr>
<tr>
<td>Ad Standards membership &amp; the logo builds trust</td>
<td>Encourage advertisers work with Ad Standards (member/logo of approval) in ads by stressing the importance &amp; value of this</td>
</tr>
</tbody>
</table>
SURVEY ANALYSIS

Awareness & General Perceptions
Online is a top awareness driver, followed by word of mouth; Boomers+ are more likely than others to be influenced by TV or print media.

**PRODUCT AWARENESS**

Source: Numerator Survey, Q1. How do you typically learn about products, services, and brands that you might purchase?
Base: Total (n=1604), Gen Z (n=76), Millennials (n=399), Gen X (n=586), Boomers+ (n=543)
Letters indicate significant testing at 95% LOC
Nearly ½ of consumers do not mind advertising relevant to them, citing that it keeps them informed about new products.

**THOUGHTS ON ADVERTISING**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Total (a)</th>
<th>Gen Z (b)</th>
<th>Millennials (c)</th>
<th>Gen X (d)</th>
<th>Boomers+ (e)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I do not mind advertising if it is relevant to me</td>
<td>46%</td>
<td>47%</td>
<td>46%</td>
<td>48%</td>
<td>45%</td>
</tr>
<tr>
<td>Advertising keeps me up-to-date about new products and services</td>
<td>45%</td>
<td>39%</td>
<td>38%</td>
<td>44%</td>
<td>44%</td>
</tr>
<tr>
<td>Most products do not perform as well as ads claim</td>
<td>32%</td>
<td>36%</td>
<td>35%</td>
<td>38%</td>
<td>41%</td>
</tr>
<tr>
<td>Advertising is manipulative</td>
<td>29%</td>
<td>36%</td>
<td>35%</td>
<td>27%</td>
<td>25%</td>
</tr>
<tr>
<td>Advertising is annoying</td>
<td>24%</td>
<td>32%</td>
<td>29%</td>
<td>27%</td>
<td>25%</td>
</tr>
<tr>
<td>Advertising is entertaining</td>
<td>23%</td>
<td>22%</td>
<td>22%</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>I try to avoid advertisements when possible</td>
<td>21%</td>
<td>21%</td>
<td>22%</td>
<td>21%</td>
<td>20%</td>
</tr>
<tr>
<td>Advertised brands are typically more trustworthy</td>
<td>9%</td>
<td>4%</td>
<td>10%</td>
<td>9%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Source: Numerator Survey, Q2 “Which of the following describes your thoughts on advertising?”
Base: Total (n=1604), Gen Z (n=76), Millennials (n=399), Gen X (n=586), Boomers+ (n=543)
Letters indicate significant testing at 95% LOC
2 in 10 consumers perceive advertising as highly favourable, while a majority feel it is somewhat favourable.

### Impression of Advertising

<table>
<thead>
<tr>
<th>T2B:</th>
<th>20%</th>
<th>20%</th>
<th>20%</th>
<th>21%</th>
<th>20%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extremely favourable</td>
<td>5%</td>
<td>7%</td>
<td>7%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td>15%</td>
<td>13%</td>
<td>13%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Very favourable</td>
<td>63%</td>
<td>61%</td>
<td>61%</td>
<td>63%</td>
<td>66%</td>
</tr>
<tr>
<td>Somewhat favourable</td>
<td>14%</td>
<td>17%</td>
<td>17%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Not very favourable</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not at all favourable</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Total (a) | Gen Z (b) | Millennials (c) | Gen X (d) | Boomers+ (e)

Source: Numerator Survey, Q3_Generally speaking, how favourable is your impression of the advertising you read, see or hear? Base: Total (n=1604), Gen Z (n=76), Millennials (n=399), Gen X (n=586), Boomers+ (n=543)
Compared to other consumers, Gen Z are less likely to consider advertising as extremely/very helpful in decision making.

However, a vast majority of each group finds advertising at least somewhat helpful.

HELPFULNESS OF ADVERTISING IN DECISION MAKING

<table>
<thead>
<tr>
<th>Source: Numerator Survey, Q4_Generally speaking, how helpful is the advertising you read, see or hear to your decision-making process as a consumer? Base: Total (n=1604), Gen Z (n=76), Millennials (n=399), Gen X (n=586), Boomers+ (n=543)</th>
<th>T2B:</th>
<th>24%</th>
<th>16%</th>
<th>25%</th>
<th>25%</th>
<th>23%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Extremely helpful</td>
<td>5%</td>
<td>5%</td>
<td>6%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>Very helpful</td>
<td>19%</td>
<td>11%</td>
<td>19%</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td></td>
<td>Somewhat helpful</td>
<td>60%</td>
<td>70%</td>
<td>57%</td>
<td>61%</td>
<td>60%</td>
</tr>
<tr>
<td></td>
<td>Not very helpful</td>
<td>13%</td>
<td>12%</td>
<td>14%</td>
<td>11%</td>
<td>14%</td>
</tr>
<tr>
<td></td>
<td>Not at all helpful</td>
<td>13%</td>
<td>12%</td>
<td>14%</td>
<td>11%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Consumers from Quebec are least likely of all to find advertising helpful in decision making.
Gen Z find print ads most accurate of all; Millennials and Gen X are almost equally likely to trust all modes of advertising

PERCEIVED ACCURACY OF ENCOUNTERED ADVERTISING
Displaying Top 2 Box: Extremely + Very Truthful/Accurate

Source: Numerator Survey, Q5_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 (n=1604), Gen Z (n=76), Millennials (n=399), Gen X (n=586), Boomers+ (n=543)
Letters indicate significant testing at 95% LOC
Online is the least trusted mode for advertising

PERCEIVED ACCURACY OF ENCOUNTERED ADVERTISING

<table>
<thead>
<tr>
<th>T2B</th>
<th>Extremely truthful/accurate</th>
<th>Very truthful/accurate</th>
<th>Somewhat truthful/accurate</th>
<th>Not very truthful/accurate</th>
<th>Not at all truthful/accurate</th>
<th>Not applicable/Not familiar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print ads</td>
<td>5%</td>
<td>13%</td>
<td>60%</td>
<td>16%</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>Television or watching a movie</td>
<td>5%</td>
<td>13%</td>
<td>59%</td>
<td>17%</td>
<td>16%</td>
<td>24%</td>
</tr>
<tr>
<td>Radio advertising</td>
<td>4%</td>
<td>14%</td>
<td>59%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online</td>
<td>4%</td>
<td>10%</td>
<td>54%</td>
<td>24%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Numerator Survey, Q5_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 (n=1604) Displaying data labels >2%
Consumers perceive Grocery stores as more accurate than others in terms of advertising

PERCEIVED ACCURACY OF ENCOUNTERED ADVERTISING
Displaying Top 2 Box: Extremely + Very Truthful/Accurate

Source: Numerator Survey, Q6_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 (n=1604), Gen Z (n=76), Millennials (n=399), Gen X (n=586), Boomers+ (n=543)
Letters indicate significant testing at 95% LOC
SURVEY ANALYSIS

Unacceptable Advertising
People find most/some of Canadian advertising to be acceptable

### PERCEPTION OF CANADIAN ADVERTISING BEING ACCEPTABLE

<table>
<thead>
<tr>
<th>T2B:</th>
<th>Total (a)</th>
<th>Gen Z (b)</th>
<th>Millennials (c)</th>
<th>Gen X (d)</th>
<th>Boomers+ (e)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All of Canadian advertising</td>
<td>4%</td>
<td>5%</td>
<td>7% e</td>
<td>4% e</td>
<td>1%</td>
</tr>
<tr>
<td>Most of Canadian advertising</td>
<td>41%</td>
<td>39%</td>
<td>37%</td>
<td>43%</td>
<td>41%</td>
</tr>
<tr>
<td>Some of Canadian advertising</td>
<td>46%</td>
<td>46%</td>
<td>45%</td>
<td>44%</td>
<td>50%</td>
</tr>
<tr>
<td>A little of Canadian advertising</td>
<td>7%</td>
<td>8%</td>
<td>9%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>None of Canadian advertising</td>
<td>45%</td>
<td>44%</td>
<td>44%</td>
<td>47%</td>
<td>42%</td>
</tr>
</tbody>
</table>

Source: Numerator Survey, Q10_Approximately, how much of Canadian advertising do you think is acceptable because it is truthful, accurate and not misleading?
Base: Total (n=1604), Gen Z (n=76), Millennials (n=399), Gen X (n=586), Boomers+ (n=543)
Letters indicate significant testing at 95% LOC
4 in 10 have encountered unacceptable advertising, with Gen Z slightly more likely than others to have encountered it.

Consumers from West & Ontario skew higher in terms of encountering unacceptable advertising.

**ENCOUNTERING UNACCEPTABLE ADVERTISING**

- **Total (a)**: 30% Yes, 40% No, 30% Not sure
- **Gen Z (b)**: 20% Yes, 49% No, 31% Not sure
- **Millennials (c)**: 29% Yes, 41% No, 30% Not sure
- **Gen X (d)**: 30% Yes, 40% No, 30% Not sure
- **Boomers+ (e)**: 34% Yes, 38% No, 29% Not sure

Source: Numerator Survey, Q7_Have you been exposed to any advertising that you found unacceptable (e.g., not truthful, inaccurate or misleading)?
Base: Total (n=1604), Gen Z (n=76), Millennials (n=399), Gen X (n=586), Boomers+ (n=543)
Of those who have experienced unacceptable advertising, a majority have encountered them online

LOCATION OF EXPERIENCING UNACCEPTABLE ADVERTISING

Source: Numerator Survey, Q8_Where did you encounter the advertising that you found unacceptable (e.g., not truthful, inaccurate or misleading)? Base: Total (n=640), Gen Z (n=37), Millennials (n=162), Gen X (n=236), Boomers+ (n=205)
*Letters indicate significant testing at 95% LOC
*Caution, low base size
Experiencing unacceptable advertising is very risky, as 3 in 4 stopped buying the product/service after experiencing it

STOPPED PURCHASING PRODUCTS DUE TO UNACCEPTABLE ADVERTISING

Source: Numerator Survey, Q9_Have you ever stopped purchasing a company's product or service because the company's ads were unacceptable (e.g., not truthful, inaccurate or misleading) to you?
Base: Total (n=640), Gen Z (n=37), Millennials (n=162), Gen X (n=236), Boomers+ (n=205)
*Caution, low base size
SURVEY ANALYSIS

Concerns, Feelings & Topics
Gen Z and Millennials are most concerned about misinterpretations, with racial diversity/equality/inclusion a key concern for them.

Source: Numerator Survey, Q12_Which, if any, of the following concerns you about Canadian advertising?
Base: Total (n=1604), Gen Z (n=76), Millennials (n=399), Gen X (n=586), Boomers+ (n=543)
Letters indicate significant testing at 95% LOC
Statements around being environmentally friendly, curbing sexual harassment, & promoting diversity/respect are most supported

FEELINGS ABOUT DISCUSSING FOLLOWING IN ADVERTISING
Displaying Top 2 Box: Much More + Somewhat More Positively

Steps they were taking to be more environmentally friendly in their operations
- Total: 65%
- Gen Z: 74%
- Millennials: 62%
- Gen X: 71%
- Boomers+: 60%

Made a public statement about the need to curb harassment in society
- Total: 56%
- Gen Z: 68%
- Millennials: 62%
- Gen X: 56%
- Boomers+: 57%

Steps they were taking to promote diversity and respect in the workforce
- Total: 56%
- Gen Z: 62%
- Millennials: 57%
- Gen X: 52%
- Boomers+: 60%

Made a public statement about the need to fight climate change
- Total: 52%
- Gen Z: 55%
- Millennials: 56%
- Gen X: 53%
- Boomers+: 52%

Steps they were taking to promote women in leadership positions
- Total: 26%
- Gen Z: 26%
- Millennials: 26%
- Gen X: 26%
- Boomers+: 22%

Included the #DEI hashtag (or DEI reference) in their online advertising and social media posts

Source: Numerator Survey, Q13_TOP 2 BOX_How would you feel about retailers or brands if they discussed or made reference to each of the following in their advertising and social media posts?
Base: Total (n=1604), Gen Z (n=76), Millennials (n=399), Gen X (n=586), Boomers+ (n=543)
Letters indicate significant testing at 95% LOC
Including the DEI hashtag in online ads is the least favoured statement

FEELINGS ABOUT DISCUSSING [THE FOLLOWING] IN ADVERTISING

<table>
<thead>
<tr>
<th>T2B:</th>
<th>65%</th>
<th>60%</th>
<th>55%</th>
<th>62%</th>
<th>26%</th>
<th>56%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Much more positively</td>
<td>24%</td>
<td>21%</td>
<td>19%</td>
<td>23%</td>
<td>6%</td>
<td>19%</td>
</tr>
<tr>
<td>Somewhat more positively</td>
<td>41%</td>
<td>39%</td>
<td>36%</td>
<td>39%</td>
<td>44%</td>
<td>37%</td>
</tr>
<tr>
<td>No impact</td>
<td>24%</td>
<td>28%</td>
<td>34%</td>
<td>27%</td>
<td>4%</td>
<td>32%</td>
</tr>
<tr>
<td>Somewhat less positively</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
<td>4%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Much less positively</td>
<td>4%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>22%</td>
<td>5%</td>
</tr>
<tr>
<td>Do not know</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Steps they were taking to be more environmentally friendly in their operations
Steps they were taking to promote diversity and respect in the workforce
Steps they were taking to promote women in leadership positions
Made a public statement about the need to curb sexual harassment in society
Included the #DEI hashtag (or DEI reference) in their online advertising and social media posts
Made a public statement about the need to fight climate change

Source: Numerator Survey, Q13_TOP 2 BOX_How would you feel about retailers or brands if they discussed or made reference to each of the following in their advertising and social media posts? Base: Total (n=1604) Displaying data labels >2%
SURVEY ANALYSIS

Rules/Regulations & Performance
Advertisers are encouraged by most Canadians, especially Boomers+, to follow rules/regulations

**Are there rules/regulations that advertisers must follow?**

- Yes
- No
- Do not know/Not sure

Source: Numerator Survey, Q14 To the best of your knowledge, are there rules and regulations about advertising that advertisers must follow?

Base: Total (n=1604), Gen Z (n=76), Millennials (n=399), Gen X (n=586), Boomers+ (n=543)

Letters indicate significant testing at 95% LOC
Boomers+ are the most concerned with advertisers abiding by rules/regulations

**Importance of Rules/Regulations in Advertising**

- **T2B:**
  - Extremely important: 45%
  - Very important: 36%
  - Somewhat important: 15%
  - Not very important: 13%
  - Not at all important: 7%

- **Source:** Numerator Survey, Q15_In your opinion, how important is it to have rules and regulations that advertisers must follow?
- **Base:** Total (n=1604), Gen Z (n=76), Millennials (n=399), Gen X (n=586), Boomers+ (n=543)

Letters indicate significant testing at 95% LOC | Displaying data labels >2%
Google & agencies broadly ranked the highest for upholding advertising standards

Gen Z are not very fond of TV and other traditional media, while trust in social media ads lessen as people get older

**ORGANIZATIONS’ PERFORMANCE IN ADVERTISING**
Displaying Top 2 Box: Outstanding + Very Good Performance

- **TV networks, radio stations, newspapers, magazine publishers and those who manage websites**
- **Google**
- **Advertising agencies that design, write and produce ads**
- **The companies/brands that pay to advertise**
- **The government**
- **Social media platforms**

Source: Numerator Survey, Q16_TOP 2 BOX_How would you rate the following organizations or entities on their performance in terms of ensuring advertising standards are upheld?

Base: Total (n=1604), Gen Z (n=76), Millennials (n=399), Gen X (n=586), Boomers+ (n=543)

Letters indicate significant testing at 95% LOC
### Social Media Platforms and Government have the least amount of support in terms of advertising

**Organizations' performance in advertising**

<table>
<thead>
<tr>
<th>T2B:</th>
<th>24%</th>
<th>23%</th>
<th>22%</th>
<th>21%</th>
<th>18%</th>
<th>16%</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV networks, radio stations, newspapers, magazine publishers and those who manage websites</td>
<td><img src="#" alt="24%" /></td>
<td><img src="#" alt="23%" /></td>
<td><img src="#" alt="22%" /></td>
<td><img src="#" alt="21%" /></td>
<td><img src="#" alt="18%" /></td>
<td><img src="#" alt="16%" /></td>
</tr>
<tr>
<td>Outstanding performance</td>
<td><img src="#" alt="5%" /></td>
<td><img src="#" alt="5%" /></td>
<td><img src="#" alt="4%" /></td>
<td><img src="#" alt="4%" /></td>
<td><img src="#" alt="4%" /></td>
<td><img src="#" alt="5%" /></td>
</tr>
<tr>
<td>Good performance</td>
<td><img src="#" alt="19%" /></td>
<td><img src="#" alt="18%" /></td>
<td><img src="#" alt="18%" /></td>
<td><img src="#" alt="17%" /></td>
<td><img src="#" alt="14%" /></td>
<td><img src="#" alt="11%" /></td>
</tr>
<tr>
<td>Somewhat poor performance</td>
<td><img src="#" alt="47%" /></td>
<td><img src="#" alt="42%" /></td>
<td><img src="#" alt="47%" /></td>
<td><img src="#" alt="48%" /></td>
<td><img src="#" alt="35%" /></td>
<td><img src="#" alt="32%" /></td>
</tr>
<tr>
<td>Very poor performance</td>
<td><img src="#" alt="18%" /></td>
<td><img src="#" alt="21%" /></td>
<td><img src="#" alt="18%" /></td>
<td><img src="#" alt="18%" /></td>
<td><img src="#" alt="23%" /></td>
<td><img src="#" alt="26%" /></td>
</tr>
<tr>
<td>Do not know/Not sure</td>
<td><img src="#" alt="4%" /></td>
<td><img src="#" alt="7%" /></td>
<td><img src="#" alt="6%" /></td>
<td><img src="#" alt="5%" /></td>
<td><img src="#" alt="15%" /></td>
<td><img src="#" alt="19%" /></td>
</tr>
</tbody>
</table>

Social Media Platforms and Government have the least amount of support in terms of advertising.

Source: Numerator Survey, Q16_TOP 2 BOX_How would you rate the following organizations or entities on their performance in terms of ensuring advertising standards are upheld?
Base: Total (n=1604)
Just over a third of respondents are aware of Ad Standards

The Canadian Code of Advertising Standards is administered by an industry regulatory body called Ad Standards (Advertising Standards Canada), which is a member-based community of Canada’s leading advertising industry companies and organizations. Members agree to uphold and support The Canadian Code of Advertising Standards through a self-regulation framework administered by Ad Standards. Before participating in this survey, had you heard of Ad Standards?

- Total (a): 34% Yes, 51% No, 14% Do not know/Not sure
- Gen Z (b): 37% Yes, 45% No, 18% Do not know/Not sure
- Millennials (c): 45% Yes, 45% No, 10% Do not know/Not sure
- Gen X (d): 45% Yes, 45% No, 10% Do not know/Not sure
- Boomers+ (e): 38% Yes, 51% No, 11% Do not know/Not sure

Over ¾ of Quebec and Atlantic residents are unaware of Ad Standards

Source: Numerator Survey, Q18_The Canadian Code of Advertising Standards is administered by an industry regulatory body called Ad Standards (Advertising Standards Canada), which is a member-based community of Canada’s leading advertising industry companies and organizations. Members agree to uphold and support The Canadian Code of Advertising Standards through a self-regulation framework administered by Ad Standards. Before participating in this survey, had you heard of Ad Standards? | Base: Total (n=1804), Gen Z (n=76), Millennials (n=399), Gen X (n=566), Boomers+ (n=543)
Trust in advertising increases by being an Ad Standards member

<table>
<thead>
<tr>
<th>LIKELIHOOD OF TRUSTING AN ADVERTISER WHO IS A MEMBER OF AD STANDARDS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>T2B:</strong> 59% 55% 55% 58% 65% c</td>
</tr>
<tr>
<td>Much more likely to trust the ad</td>
</tr>
<tr>
<td>Somewhat more likely to trust the ad</td>
</tr>
<tr>
<td>No impact on my likelihood to trust the ad</td>
</tr>
<tr>
<td>Somewhat less likely to trust the ad</td>
</tr>
<tr>
<td>Much less likely to trust the ad</td>
</tr>
<tr>
<td>Do not know/Not sure</td>
</tr>
</tbody>
</table>

Source: Numerator Survey, Q19_Would you be more or less likely to trust an advertisement if you knew the advertiser was a member of Ad Standards?
Base: Total (n=1604), Gen Z (n=76), Millennials (n=399), Gen X (n=586), Boomers+ (n=543)
Letters indicate significant testing at 95% LOC
Displaying data labels >2%

Boomers+ skew the highest in trusting an advertiser who is a member of Ad Standards
Ads with the Ad Standards logo builds trust

Females are significantly more likely than males to trust an advertisement having Ad Standards logo of approval

LIKELIHOOD OF TRUSTING AN ADVERTISEMENT HAVING LOGO OF AD STANDARDS APPROVAL

<table>
<thead>
<tr>
<th>T2B:</th>
<th>63%</th>
<th>54%</th>
<th>56%</th>
<th>61%</th>
<th>70% bcd</th>
</tr>
</thead>
<tbody>
<tr>
<td>Much more likely to trust the ad</td>
<td>23%</td>
<td>21%</td>
<td>19%</td>
<td>21%</td>
<td>27% c</td>
</tr>
<tr>
<td>Somewhat more likely to trust the ad</td>
<td>40%</td>
<td>33%</td>
<td>37%</td>
<td>40%</td>
<td>43%</td>
</tr>
<tr>
<td>No impact on my likelihood to trust the ad</td>
<td>26%</td>
<td>33%</td>
<td>30% e</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>Somewhat less likely to trust the ad</td>
<td></td>
<td></td>
<td>5% de</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Much less likely to trust the ad</td>
<td></td>
<td></td>
<td>7%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do not know/Not sure</td>
<td>3%</td>
<td>7% e</td>
<td>7%</td>
<td>8%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Total (a)       Gen Z (b)    Millennials (c)    Gen X (d)    Boomers+ (e)

Source: Numerator Survey, Q20_Would you be more or less likely to trust an advertisement if the ad had a logo on it indicating it had been reviewed and approved by Ad Standards?
Base: Total (n=1604), Gen Z (n=76), Millennials (n=399), Gen X (n=586), Boomers+ (n=543)
Letters indicate significant testing at 95% LOC     Displaying data labels >2%
Millennials and Gen X rate Ad Standards the highest

AD STANDARDS PERFORMANCE RATING

<table>
<thead>
<tr>
<th>T2B:</th>
<th>35%</th>
<th>23%</th>
<th>40% e</th>
<th>37% e</th>
<th>26%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outstanding performance</td>
<td>9%</td>
<td>8%</td>
<td>13% e</td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td>Very good performance</td>
<td>26%</td>
<td>15%</td>
<td>27%</td>
<td>30%</td>
<td>22%</td>
</tr>
<tr>
<td>Good performance</td>
<td>41%</td>
<td>46%</td>
<td>35%</td>
<td>40%</td>
<td>46%</td>
</tr>
<tr>
<td>Somewhat poor performance</td>
<td>13%</td>
<td>4%</td>
<td>13%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>Very poor performance</td>
<td>9%</td>
<td>12%</td>
<td>8%</td>
<td>8%</td>
<td>12%</td>
</tr>
<tr>
<td>Do not know</td>
<td>Total (a)</td>
<td>Gen Z* (b)</td>
<td>Millennials (c)</td>
<td>Gen X (d)</td>
<td>Boomers+ (e)</td>
</tr>
</tbody>
</table>

Source: Numerator Survey, Q21_How would you rate Ad Standards’ performance in terms of ensuring advertising standards are upheld?
Base: Total (n=576), Gen Z (n=26), Millennials (n=149), Gen X (n=221), Boomers+ (n=180)
Letters indicate significant testing at 95% LOC
Displaying data labels >2% | *Caution, low base size
Thank you!

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