

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



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

- Al 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

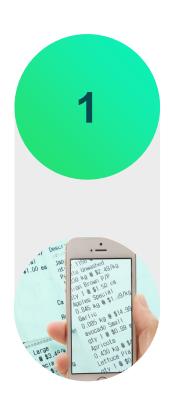
Retailer, Basket, Items, Payment Method and DATE/TIME all captured

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



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

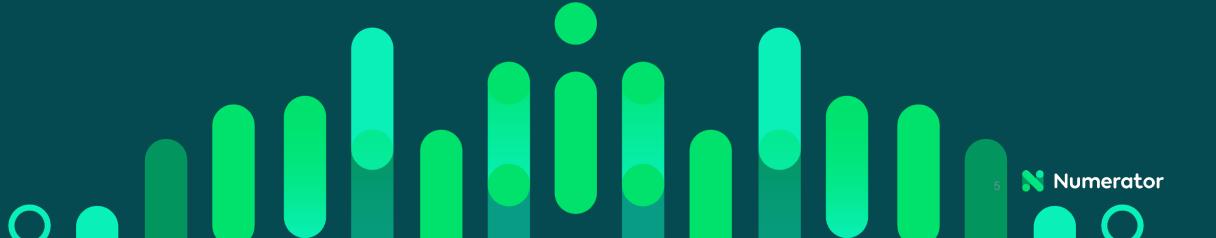


Intercept shopper
ATTITUDES with mobile
surveys to understand the
'why behind the buy'



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

INSIGHTS

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.

RECOMMENDATIONS

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) & continue to **inform** consumers about **new products/services**.



Executive Summary & Recommendations

INSIGHTS

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)



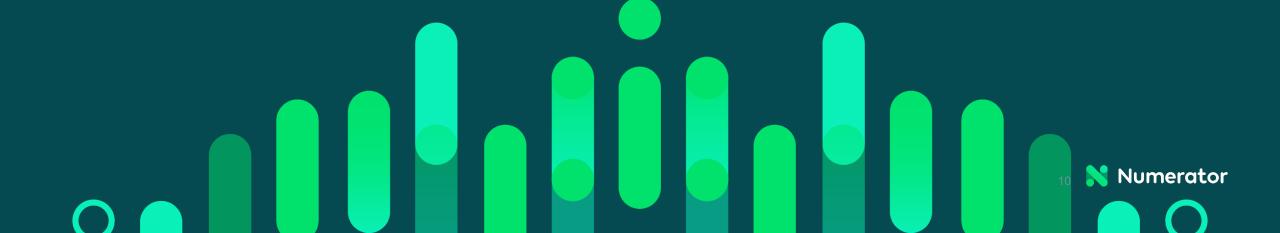
Executive Summary & Recommendations

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

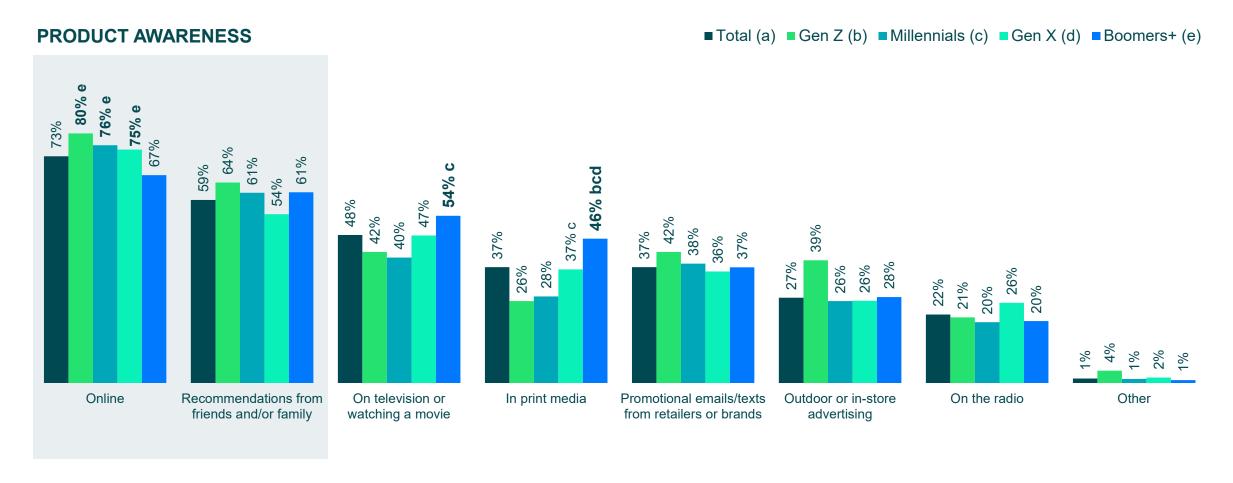


SURVEY ANALYSIS

Awareness & General Perceptions

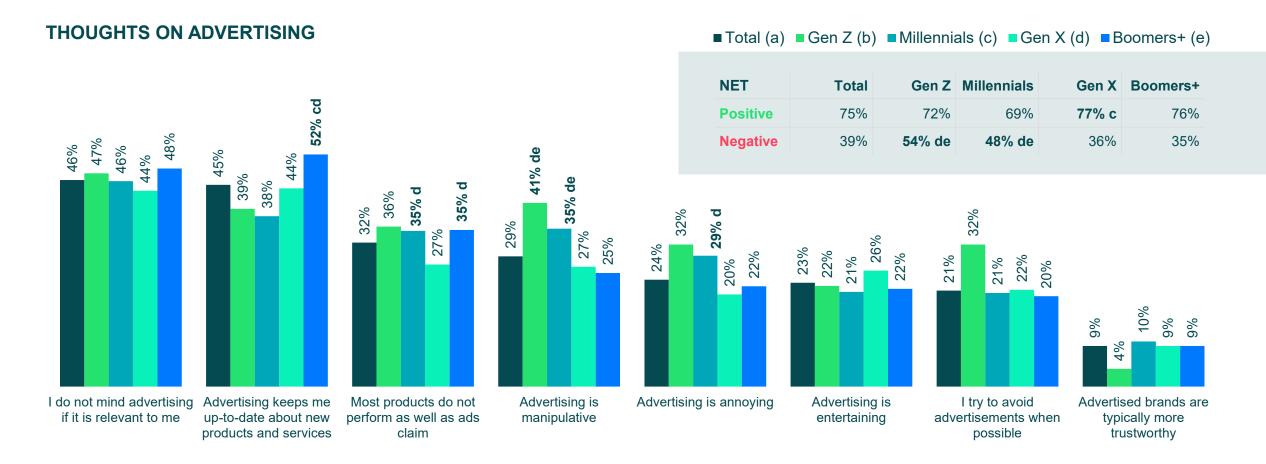


Online is a top awareness driver, followed by word of mouth; Boomers+ are more likely than others to be influenced by TV or print media





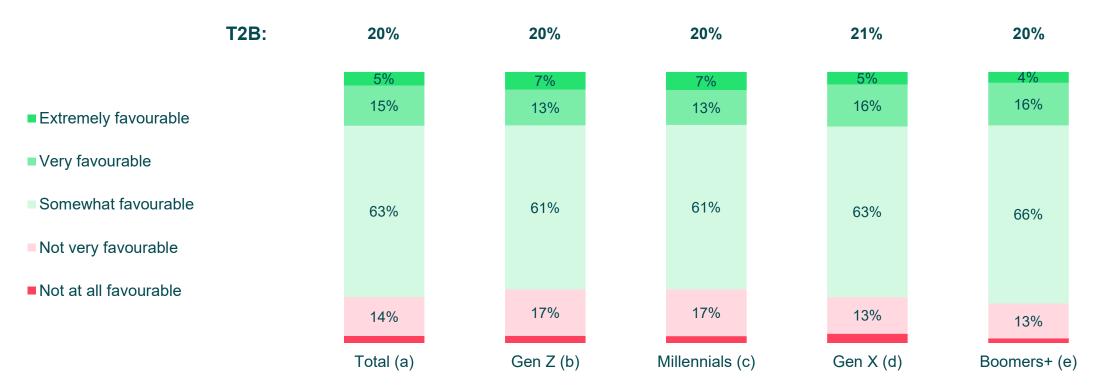
Nearly ½ of consumers do not mind advertising relevant to them, citing that it keeps them informed about new products





2 in 10 consumers perceive advertising as highly favourable, while a majority feel it is somewhat favourable

IMPRESSION OF ADVERTISING

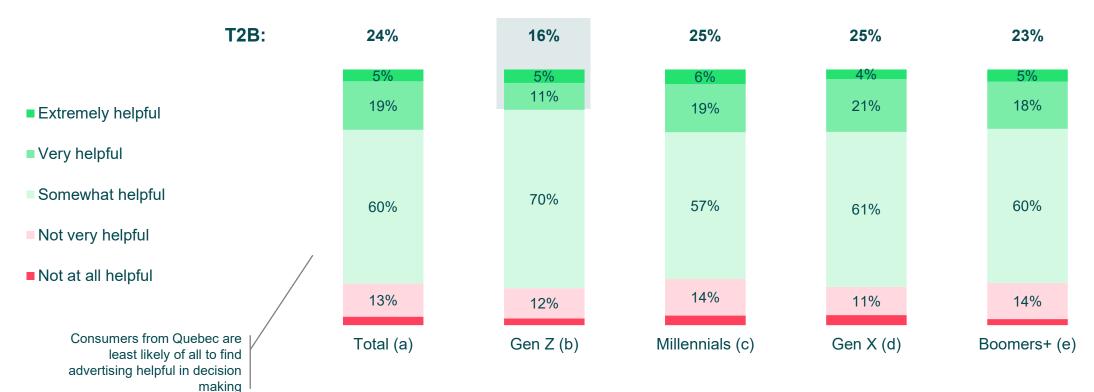




Compared to other consumers, Gen Z are less likely to consider advertising as extremely/very helpful in decision making

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

HELPFULNESS OF ADVERTISING IN DECISION MAKING



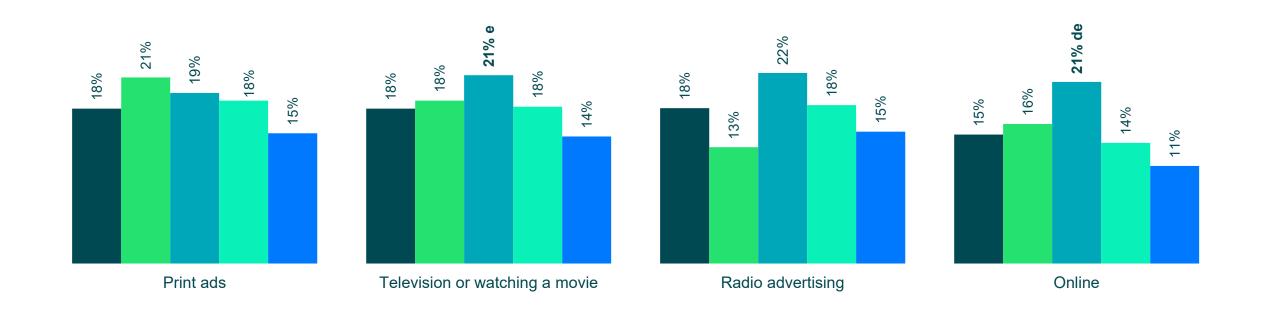


Gen Z find print ads most accurate of all; Millennials and Gen X are almost equally likely to trust all modes of advertising

PERCEIVED ACCURACY OF ENCOUNTERED ADVERTISING

Displaying Top 2 Box: Extremely + Very Truthful/Accurate

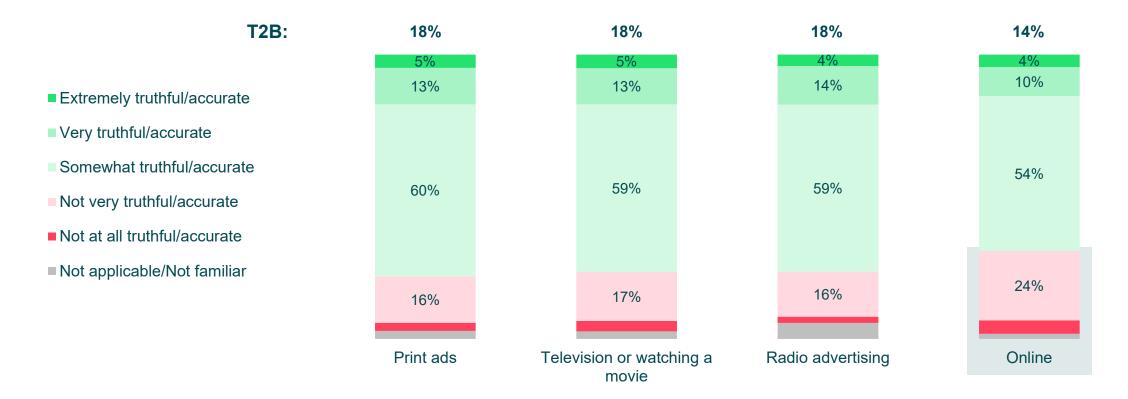






Online is the least trusted mode for advertising

PERCEIVED ACCURACY OF ENCOUNTERED ADVERTISING

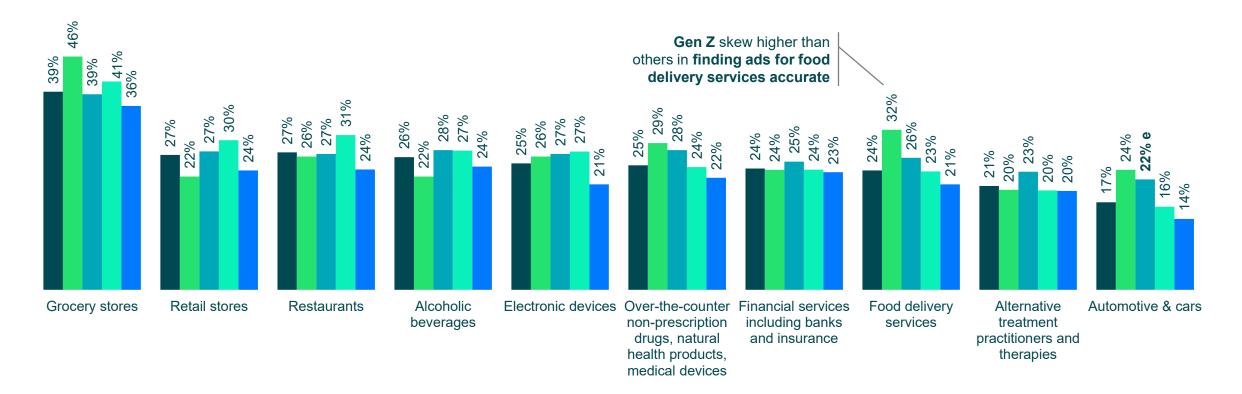




Consumers perceive Grocery stores as more accurate than others in terms of advertising

PERCEIVED ACCURACY OF ENCOUNTERED ADVERTISING

Displaying Top 2 Box: Extremely + Very Truthful/Accurate





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

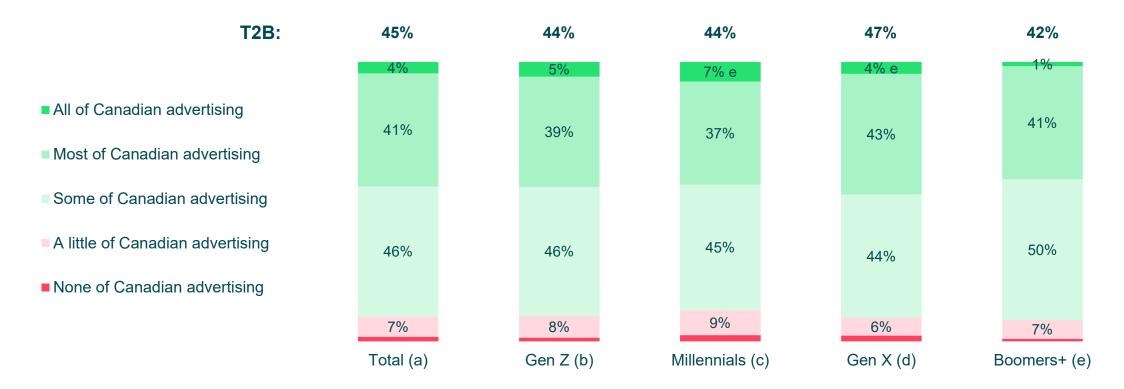
SURVEY ANALYSIS

Unacceptable Advertising



People find most/some of Canadian advertising to be acceptable

PERCEPTION OF CANADIAN ADVERTISING BEING ACCEPTABLE

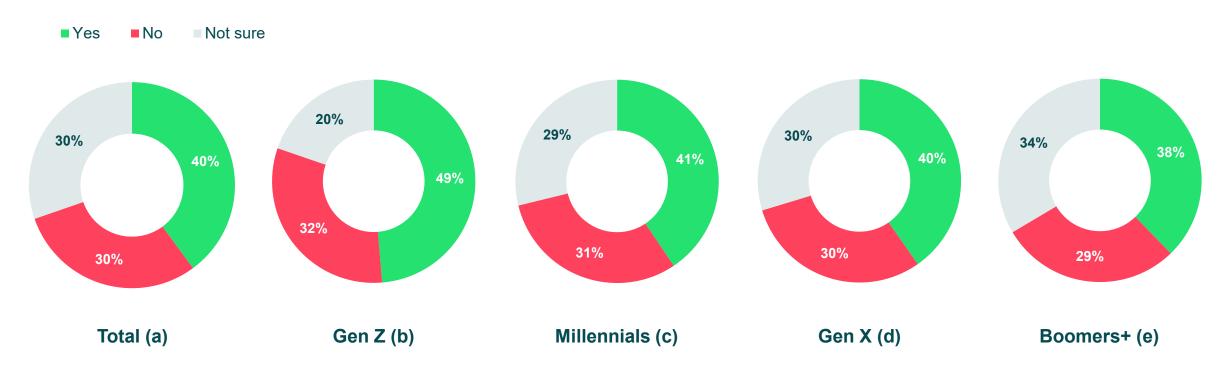




4 in 10 have encountered unacceptable advertising, with Gen Z slightly more likely than others to have encountered it

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

ENCOUNTERING UNACCEPTABLE ADVERTISING

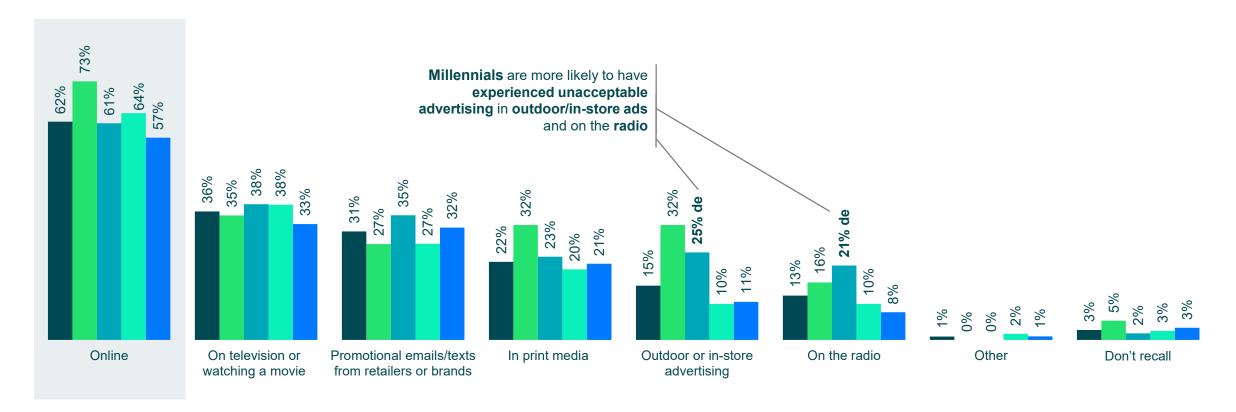




Of those who have experienced unacceptable advertising, a majority have encountered them online

LOCATION OF EXPERIENCING UNACCEPTABLE ADVERTISING

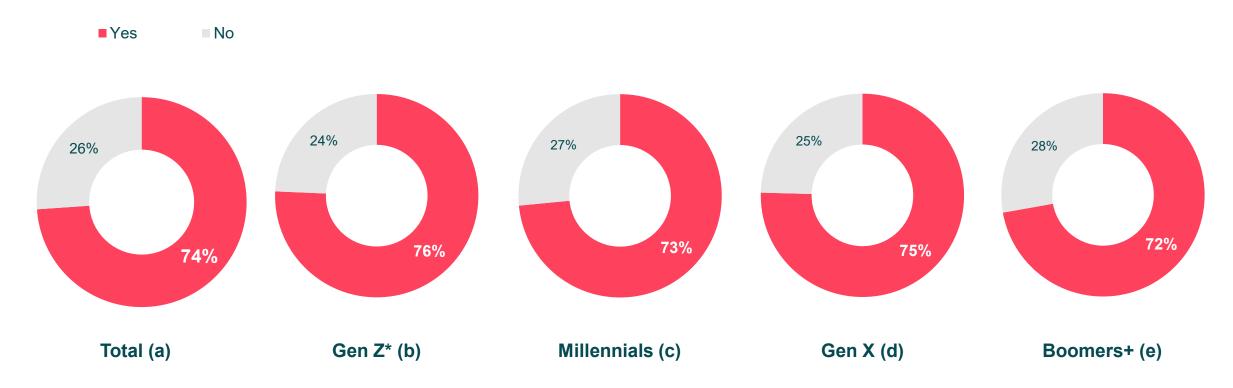






Experiencing unacceptable advertising is very risky, as 3 in 4 stopped buying the product/service after experiencing it

STOPPED PURCHASING PRODUCTS DUE TO UNACCEPTABLE ADVERTISING



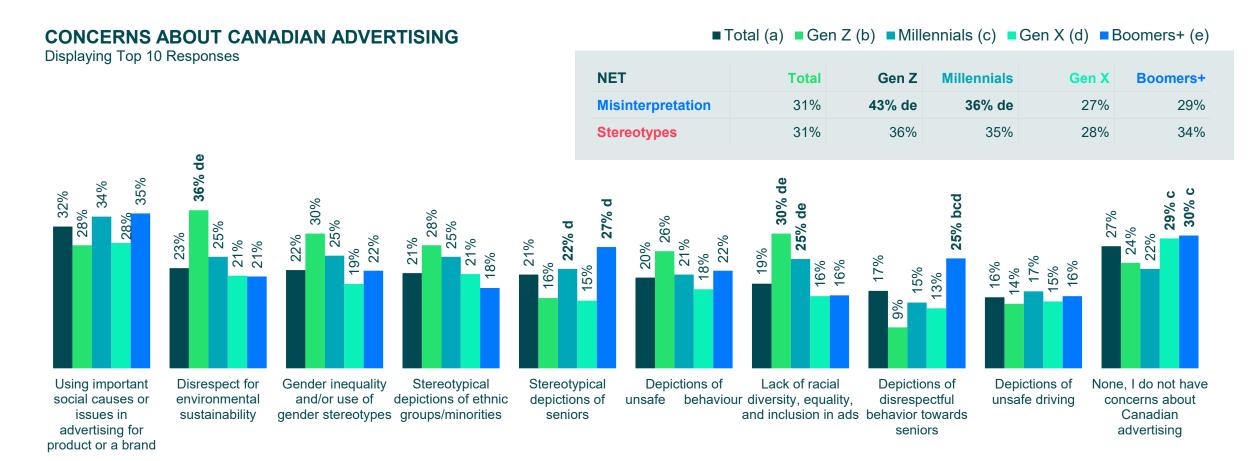


SURVEY ANALYSIS

Concerns, Feelings & Topics



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



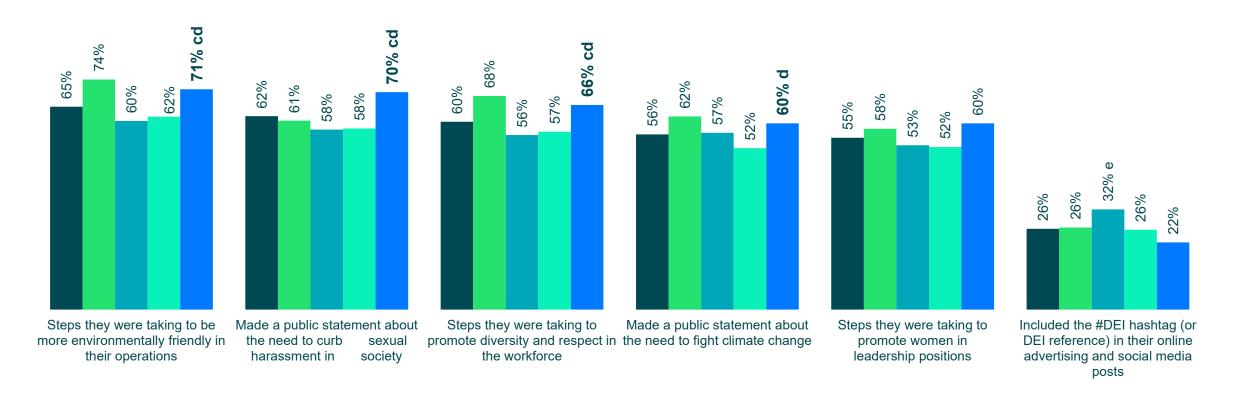


Statements around being environmentally friendly, curbing sexual harassment, & promoting diversity/respect are most supported

FEELINGS ABOUT DISCUSSING FOLLOWING IN ADVERTISING

Displaying Top 2 Box: Much More + Somewhat More Positively





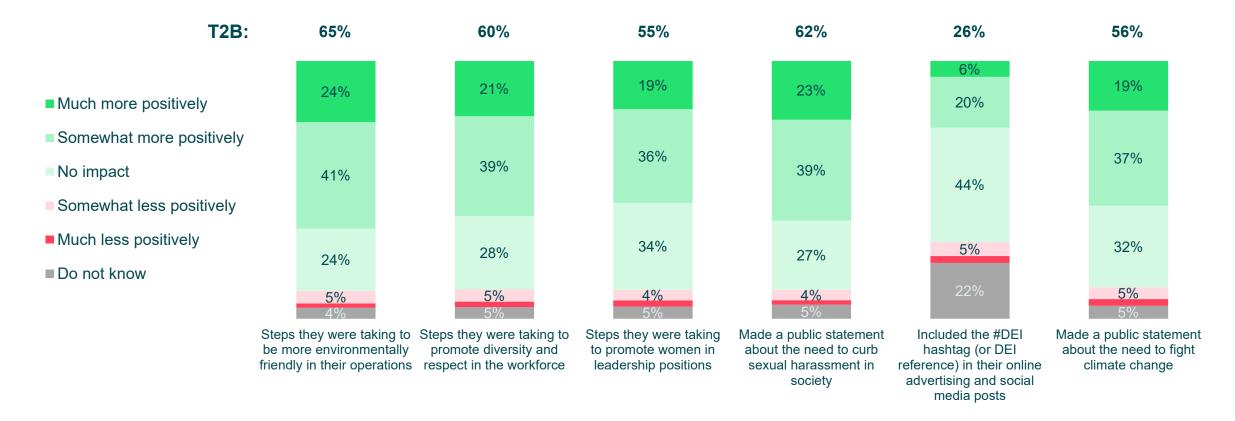
Source: Numerator Survey, Q13_TOP 2 BOX_How would you feel about retailers or brands if they discussed or made reference to each of the following in their advertising and social media posts?





Including the DEI hashtag in online ads is the least favoured statement

FEELINGS ABOUT DISCUSSING [THE FOLLOWING] IN ADVERTISING





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

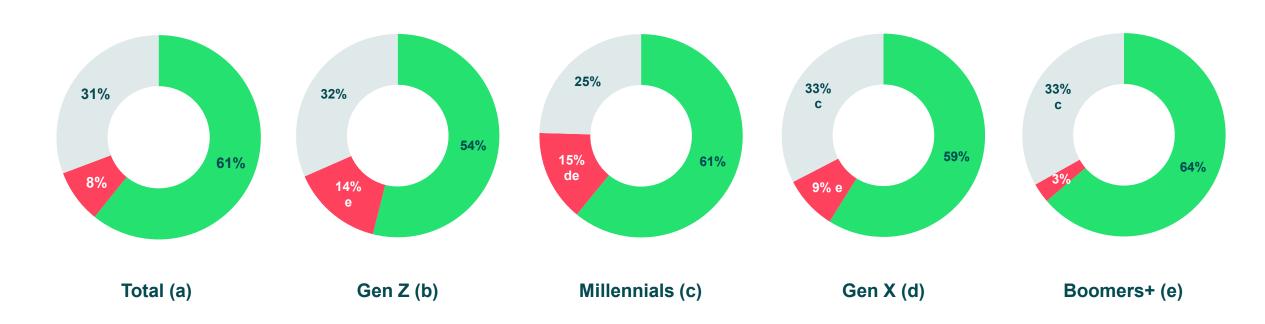
Rules/Regulations & Performance



Advertisers are encouraged by most Canadians, especially Boomers+, to follow rules/regulations

ARE THERE RULES/REGULATIONS THAT ADVERTISERS MUST FOLLOW?

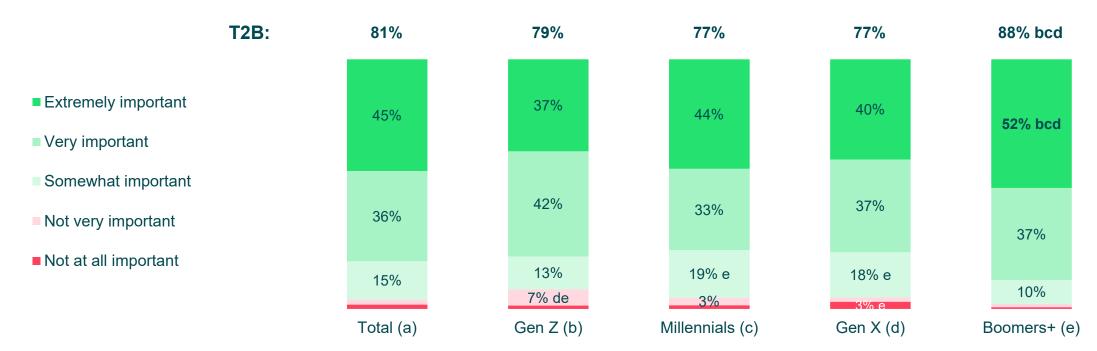






Boomers+ are the most concerned with advertisers abiding by rules/regulations

IMPORTANCE OF RULES/REGULATIONS IN ADVERTISING





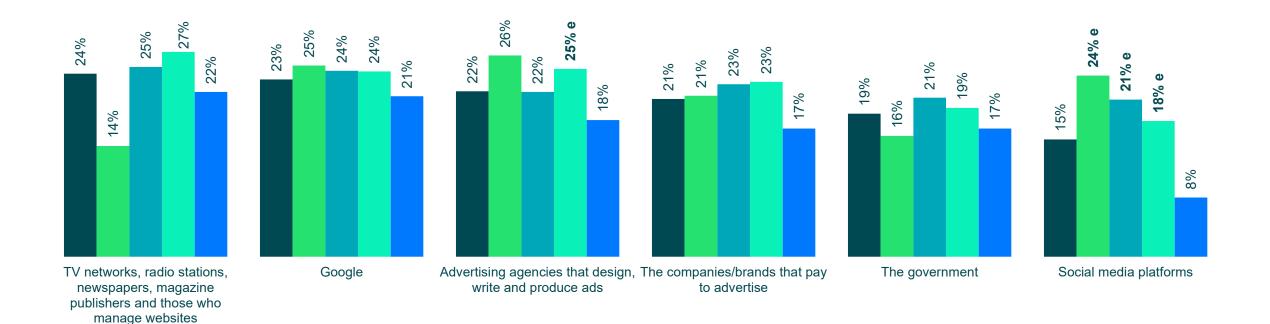
Google & agencies broadly ranked the highest for upholding advertising standards

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



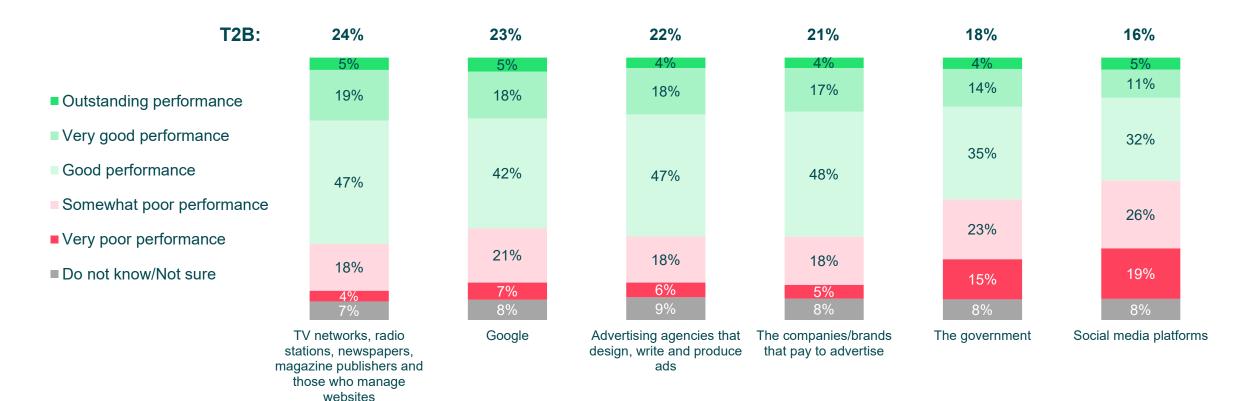






Social Media Platforms and Government have the least amount of support in terms of advertising

ORGANIZATIONS' PERFORMANCE IN ADVERTISING



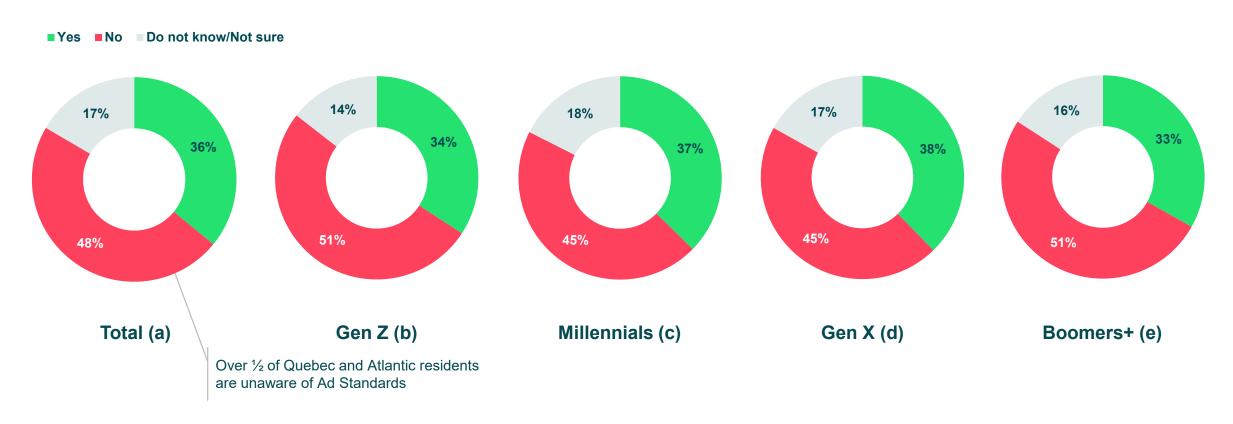
Source: Numerator Survey, Q16_TOP 2 BOX_How would you rate the following organizations or entities on their performance in terms of ensuring advertising standards are upheld?

Base: Total (n=1604)

🛾 N Numerator

Just over a third of respondents are aware of Ad Standards

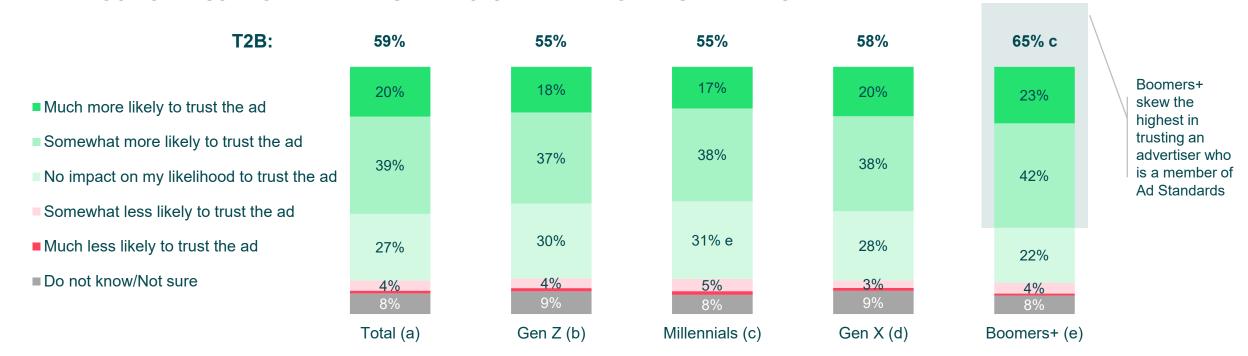
AWARENESS ABOUT AD STANDARDS





Trust in advertising increases by being an Ad Standards member

LIKELIHOOD OF TRUSTING AN ADVERTISER WHO IS A MEMBER OF AD STANDARDS

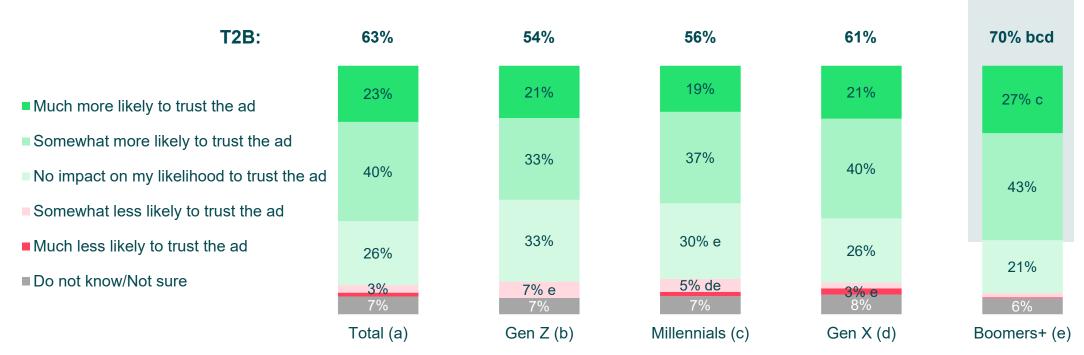




Ads with the Ad Standards logo builds trust

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

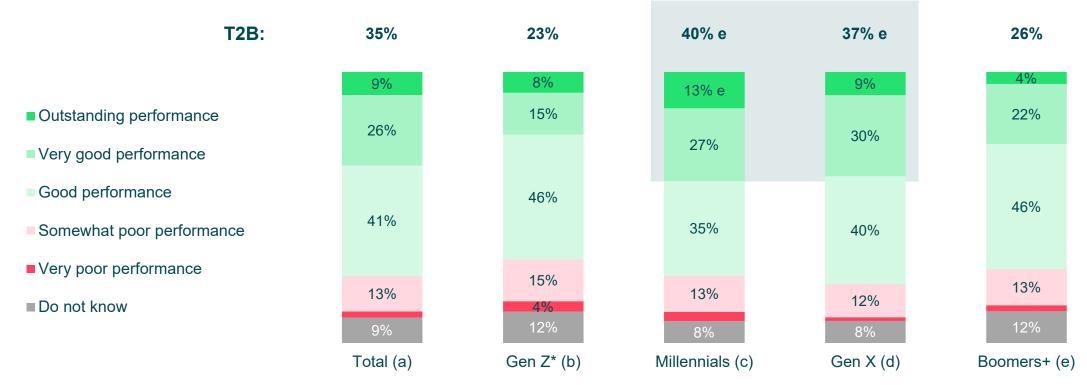
LIKELIHOOD OF TRUSTING AN ADVERTISEMENT HAVING LOGO OF AD STANDARDS APPROVAL





Millennials and Gen X rate Ad Standards the highest

AD STANDARDS PERFORMANCE RATING









Thank you!

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