



# POWER MOVES:

HOW CANADIAN ADVERTISING HAS PIVOTED AND PERSEVERED

2023



# ANDREA BEACH

MANAGING DIRECTOR, ADVERTISING INTELLIGENCE CANADA

# TOPICS

- **WHO IS VIVVIX?**
- **THE CANADIAN ADVERTISING LANDSCAPE**
- **WHAT TO KEEP AN EYE OUT FOR**

# WHO IS **VIVVIX** ?

## **KANTAR**

**AD INTELLIGENCE BUSINESS UNIT**

Heavy use in sales /business pitches & media planning

Known for comparative spend data

Strong with agencies & media companies

Recognized for top tier customer support



## **Numerator**

**AD INTELLIGENCE BUSINESS UNIT**

Heavy use in strategy & creative intel

Known for creative and industry detail

Strong brand advertisers

Recognized for top tier customer support

**OUR PURPOSE IS TO PROVIDE **WINNING** CLARITY.**

**WHEN YOUR UNDERSTANDING OF THE LANDSCAPE GROWS MORE VIVID,  
SO DOES YOUR ABILITY TO COMMAND IT.**

# MEASURING CRITICAL DIMENSIONS OF ADVERTISING ACTIVITY

MORE DIGITAL ENHANCEMENTS BEGINNING APRIL 2023

## BREAKING CREATIVE

- Quickly monitor competitor's advertising activity
- Capturing new ads launched within the last 24-48 hours
- Continuous monitoring

## AD EXPENDITURES

- Track where, when, and how brands spend their ad dollars.
- Analyze ad activity for SOV, Media mix, seasonality, trending, brand launch, Micro-Macro analysis
- ~ 28 days after the end of the period

## TELEVISION GRPS

- Optimize your plans and budgets by ensuring that your TV ads are hitting the right target audience
- ~ 21 days after end of period - weekly



# VICKY KOCIPER

TEAM DIRECTOR, CUSTOMER SUCCESS

# THE CANADIAN ADVERTISING LANDSCAPE



# OVERALL AD EXPENDITURE HAS RISEN 2 CONSECUTIVE YEARS

April to July had stronger than usual ad spend which contributed to the overall year over year increase.

## +5%

YEAR OVER YEAR AD SPEND

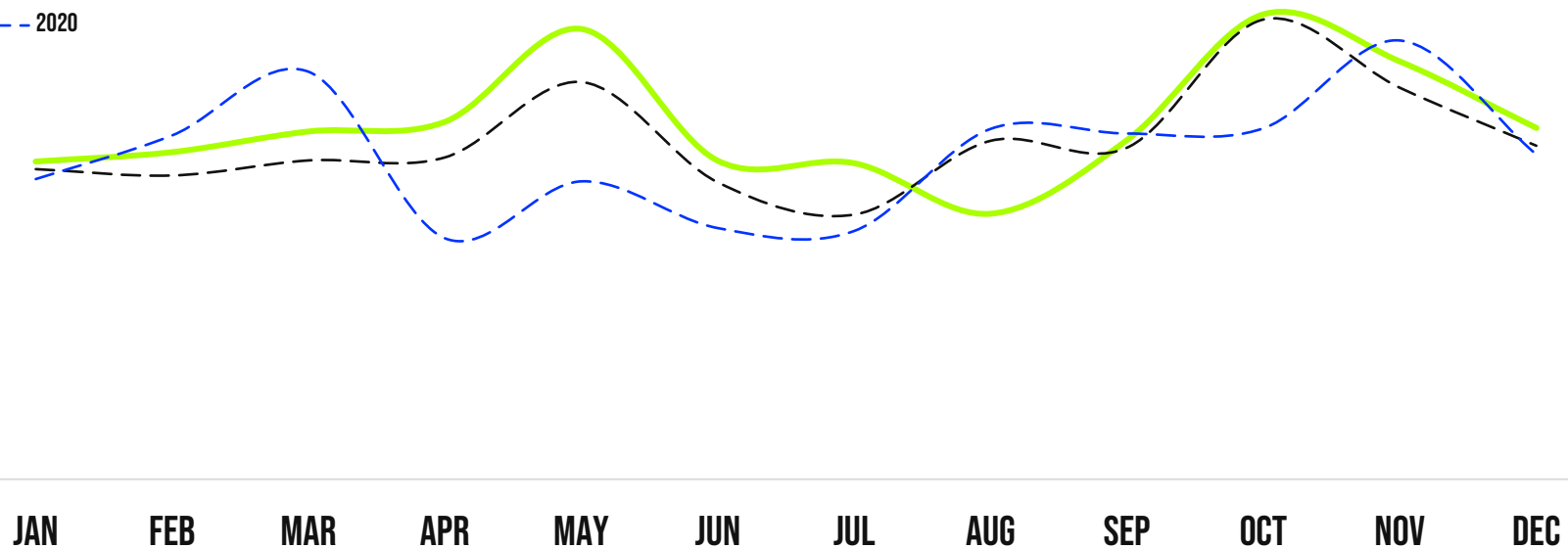
## +10%

YEAR OVER YEAR AD SPEND  
COMPARED TO 2020

### MONTH OVER MONTH AD SPEND

2022

— 2022  
- - - 2021  
- - - 2020

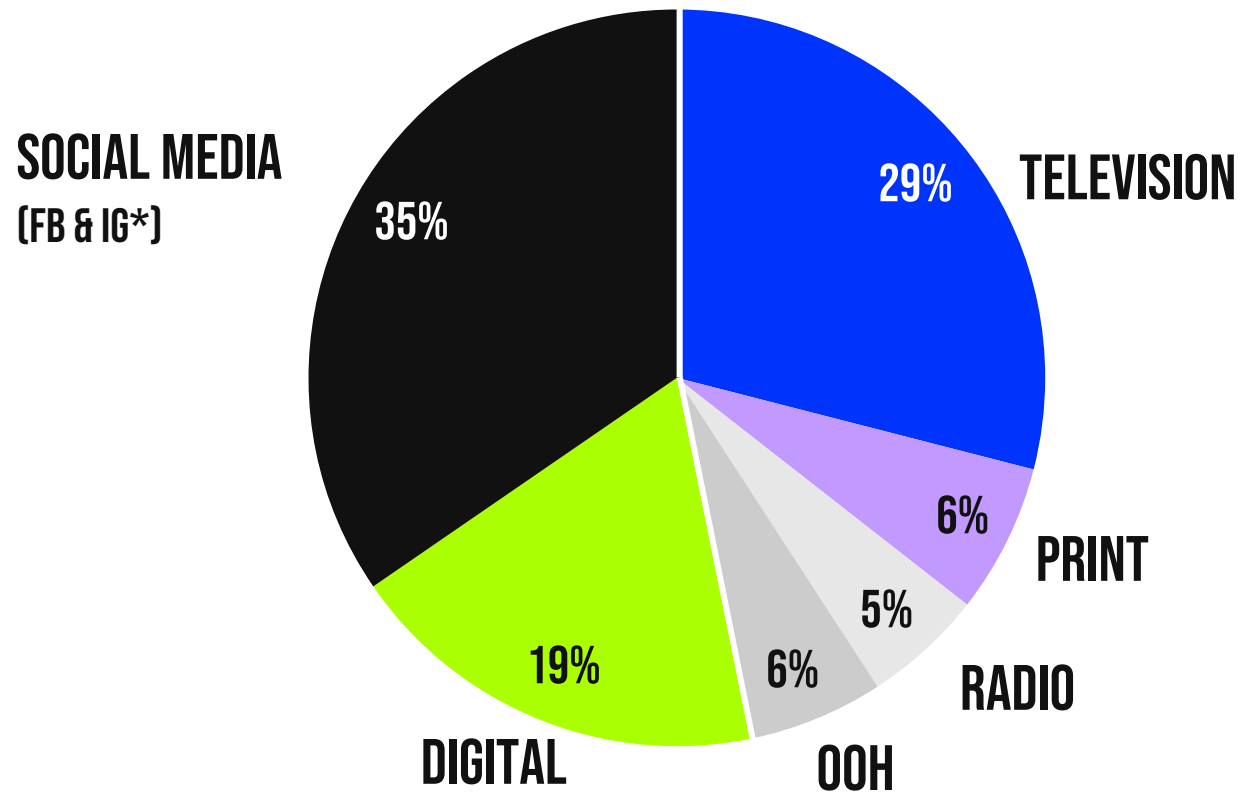


# DIGITAL NOW ACCOUNTS FOR MORE THAN HALF TOTAL AD EXPENDITURE

Facebook & Instagram have the largest share of advertising expenditure with 35%.

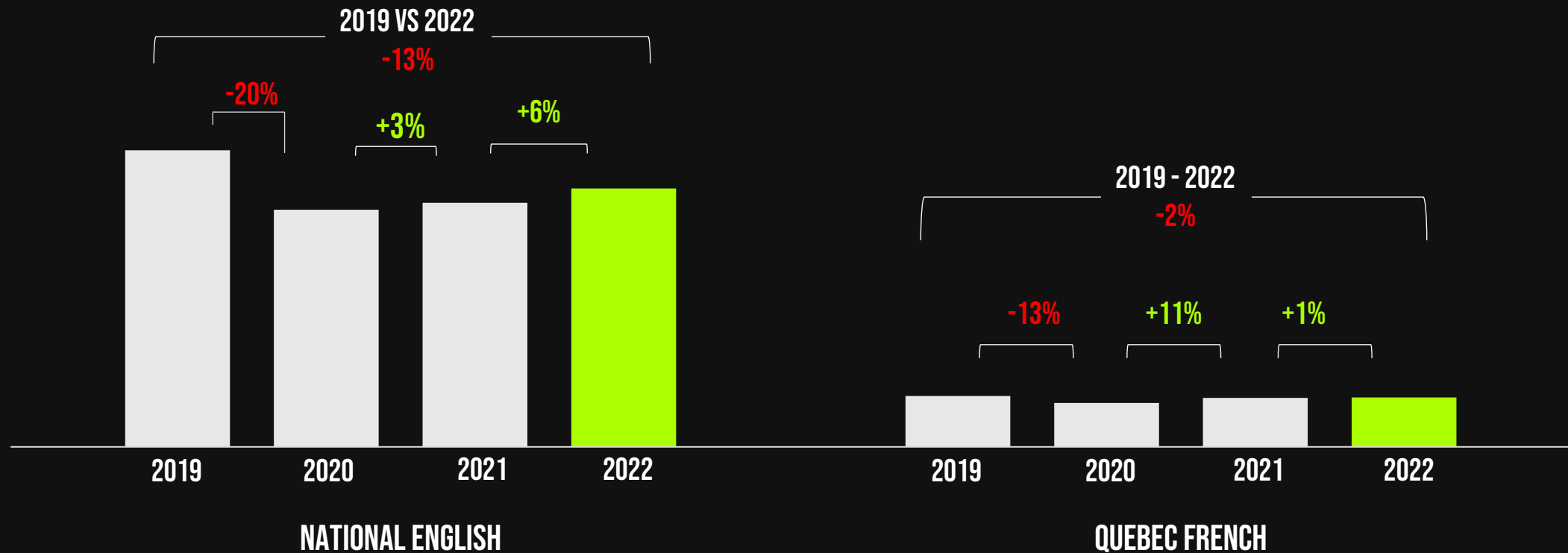
# 54%

PAID SOCIAL AND DIGITAL MEDIA  
ACCOUNT OF TOTAL SPEND IN 2022



# ENGLISH CANADA VS FRENCH CANADA

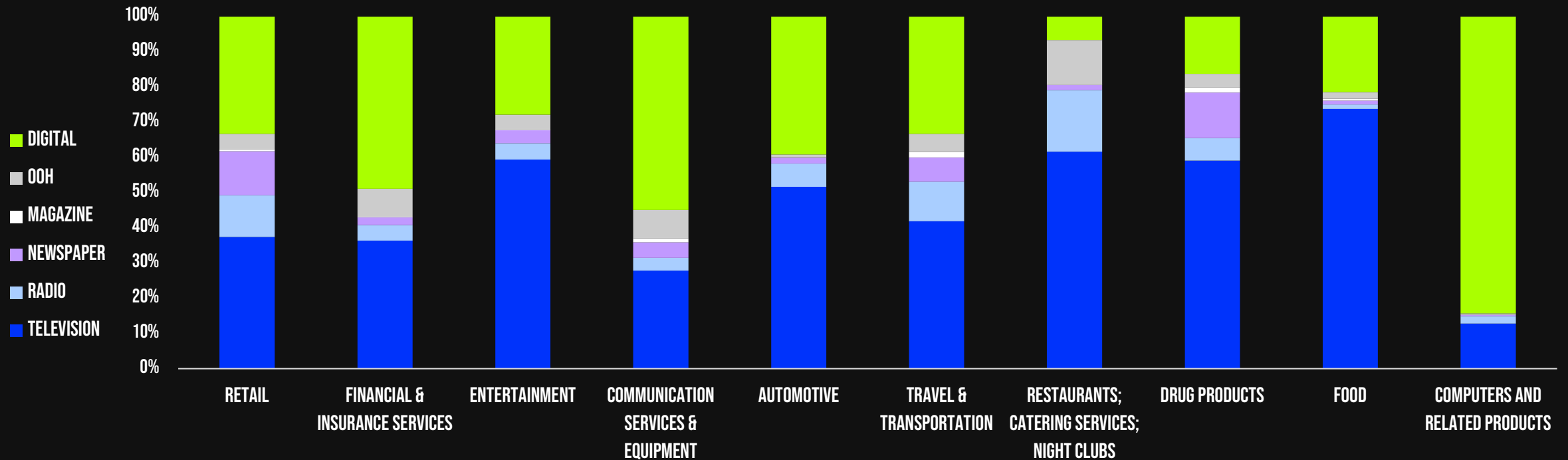
YoY Ad Spend



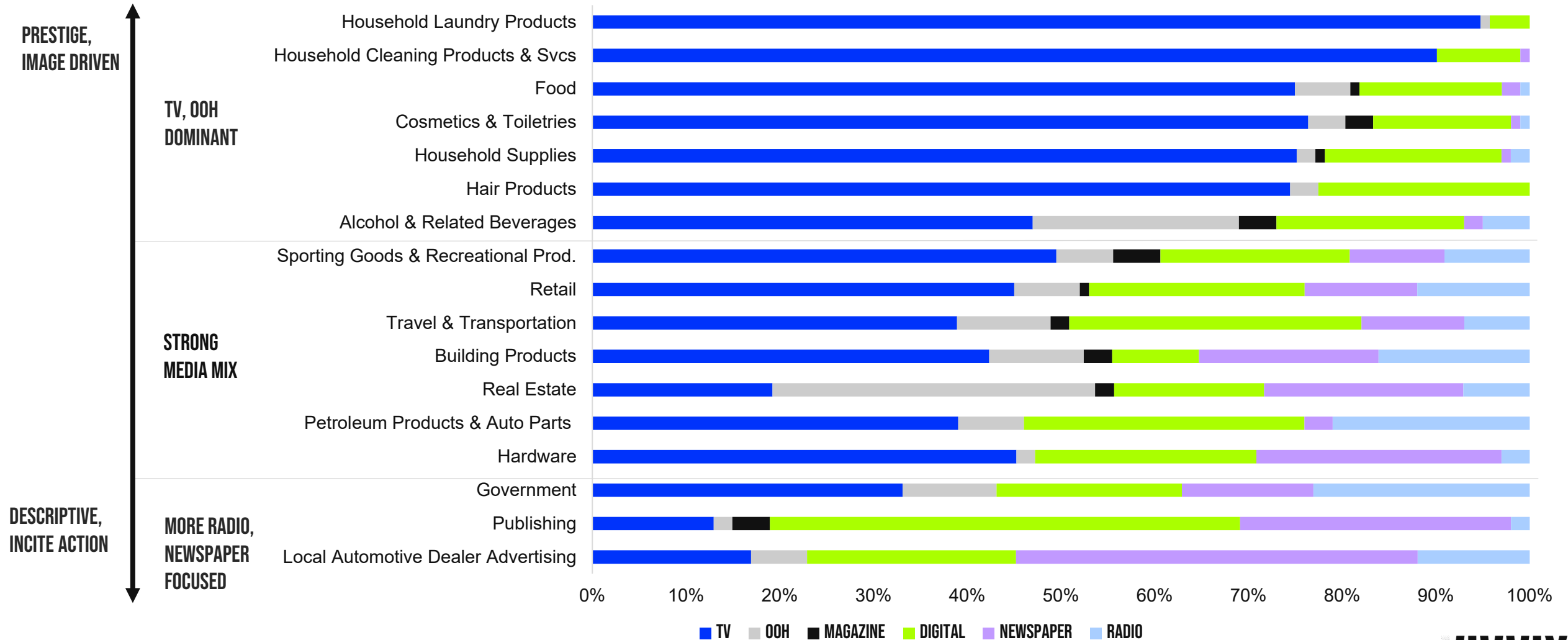
# INVESTMENT BY CATEGORY

The Food and Restaurant categories invested 74% and 62% respectively in Television alone, while Computers and Communication Services rely more heavily on Digital.

## TOP 10 CATEGORIES BY AD EXPENDITURE | MEDIA MIX 2022



# INVESTMENT BY CATEGORY





**GREG ORLANDO**

**CUSTOMER SUCCESS DIRECTOR**

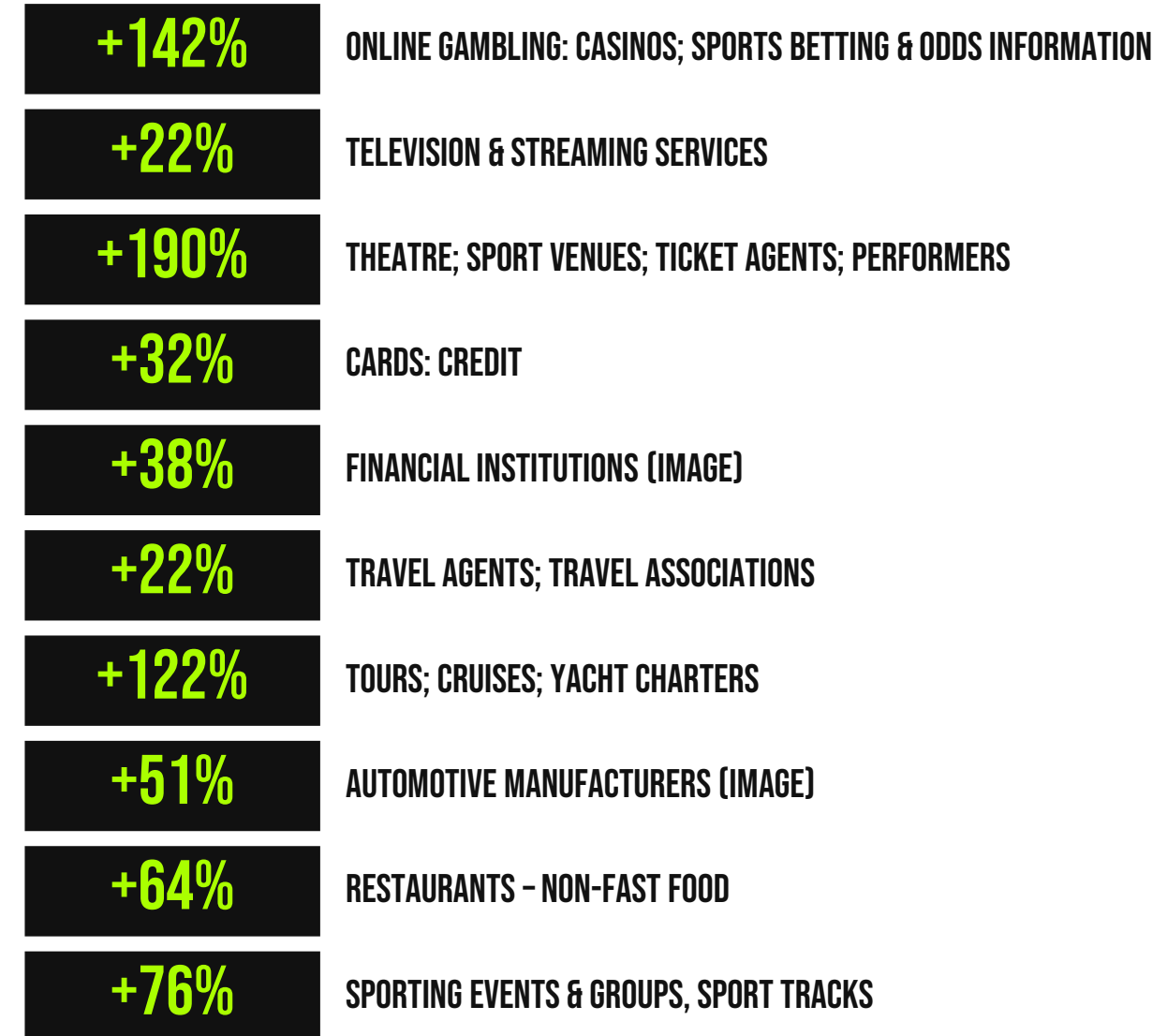
# TOP CLASS RANKED BY SPEND INCREASE

Online Gambling and Casinos was the class with the largest dollar increase in ad spend YoY, followed by:

- Television & Streaming Services
- Theatre
- Sport Venues
- Ticket Agents
- Performers

## YEAR-OVER-YEAR PERCENT CHANGE IN AD SPEND BY TOP CLASSES (\$)

RANKED ON \$ CHANGE | 2021 VS 2022



# TOP CLASS RANKED BY SPEND **DECREASE**

Stockbrokers & Investment management was the class with the largest dollar decrease in ad spend YoY, followed by Automotive Nameplate, and the Government of Quebec.

## YEAR-OVER-YEAR PERCENT CHANGE IN AD SPEND BY TOP CLASSES (\$)

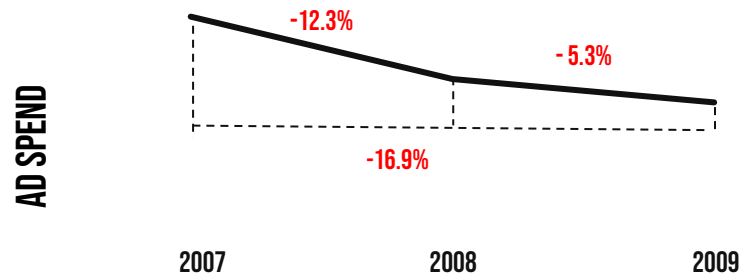
RANKED ON \$ CHANGE | 2021 VS 2022





# NOTEWORTHY OBSERVATIONS: 2007-2009 AD EXPENDITURE

## 2007 – 2009: TOTAL AD SPEND



## 2009 VS 2007

RADIO	+8.6%
OOH	-1.5%
MAGAZINE	-2.8%
TELEVISION	-6.0%
NEWSPAPER	-35.5%

## OUT OF 54 CATEGORIES

38 categories declined in 2008, while 43 declined between 2009 and 2007.

## CHANGE IN SPEND | 2009 VS 2007

+9%	RESTAURANTS
+7%	FOOD
+7%	LAUNDRY PRODUCTS
+5%	CLEANING PRODUCTS
-16%	RETAIL
-19%	ENTERTAINMENT
-22%	TRAVEL & TRANSPORTATION
-29%	AUTOMOTIVE
-53%	REAL ESTATE
-55%	COMPUTERS & PRODUCT

# AUTO CHIP SHORTAGE

BETWEEN 2021 AND 2022, 14.8 MILLION CARS WERE CUT FROM PRODUCTION\*



Due to the shortage of new vehicles in 2022, auto companies adjusted their messaging to consumers by increasing the focus on branding with a reduction in selling.

The Image class which is Masterbrand had a large increase and Nameplate which is general model branding had an increase in the dealers assoc. and remained relatively stable within the manufacturers.

**AUTOMOTIVE**  
**-15%**

**AUTOMOTIVE MANUFACTURERS**  
[\$]  
**-18%**

<b>+51%</b>	IMAGE
<b>-62%</b>	LEASE/PURCHASE
<b>-6%</b>	NAMEPLATE
<b>-39%</b>	TACTICAL
<b>-48%</b>	LEASING

**AUTOMOTIVE DEALERS ASSOC.**  
[\$]  
**+16%**

<b>+58%</b>	IMAGE
<b>-6%</b>	LEASE/PURCHASE
<b>+158%</b>	NAMEPLATE
<b>-13%</b>	TACTICAL
<b>-43%</b>	LEASING

\*Vivvix, Advertising Expenditures, All Media, 2021-2022

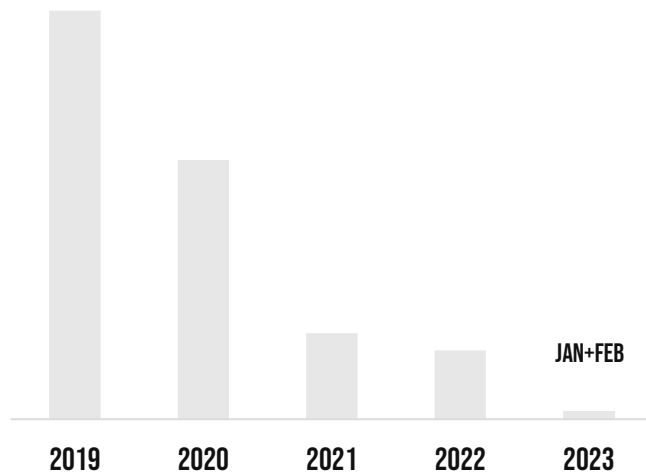
\*Source: <https://www.emsnow.com/the-auto-chip-shortage-remains-but-it-may-be-improving-new-report/>

# ARE EMERGING SOCIAL TRENDS SEEING EMERGING AD SPEND?

## PLANT-BASED MEAT SUBSTITUTES REACH \$148.9M SALES IN CANADA, UP \$40M FROM 2019. \*

Although we have seen an increase in plant-based meat alternatives product sales, advertising for these products has decreased since 2019, mainly due to the decline of the heavy restaurant advertising of Beyond Meat after 2019.

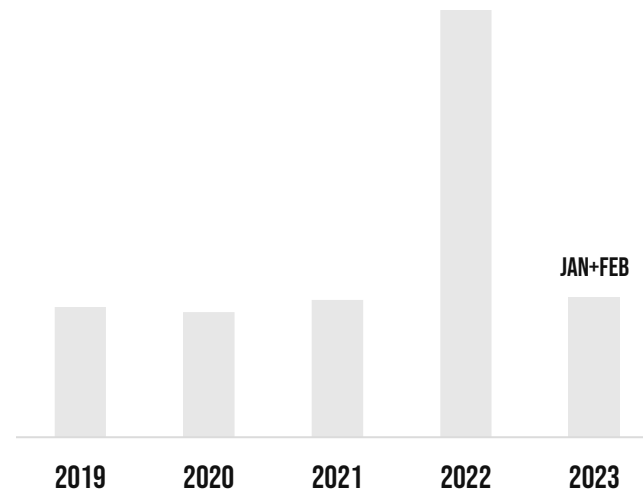
46 ACTIVE BRANDS IN 2022 & 2023



## NON ALCOHOLIC BEER HITS \$22B WORLDWIDE\*\*

The Non Alcoholic subcategory now represents 4% of the total ad spend of the Alcohol & Related Beverages category. Small increase in the number of products advertised in 2022, however, class was dominated by 2 brands.

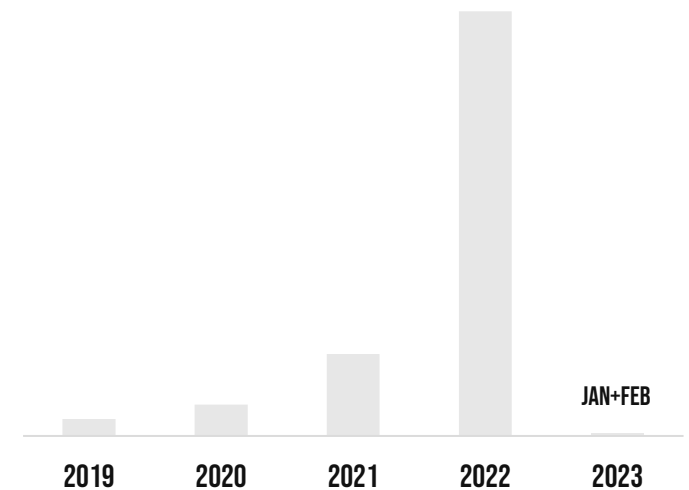
32 ACTIVE BRANDS IN 2022 & 2023



## CRYPTOCURRENCY, BLOCKCHAIN AND NFTS CLASS INCREASED BY 417% IN 2022.

96% of the total ad spend in 2022 was in the first 8 months. A few months after the latest crypto crash, advertising has dwindled.

101 ACTIVE BRANDS IN 2022 & 2023

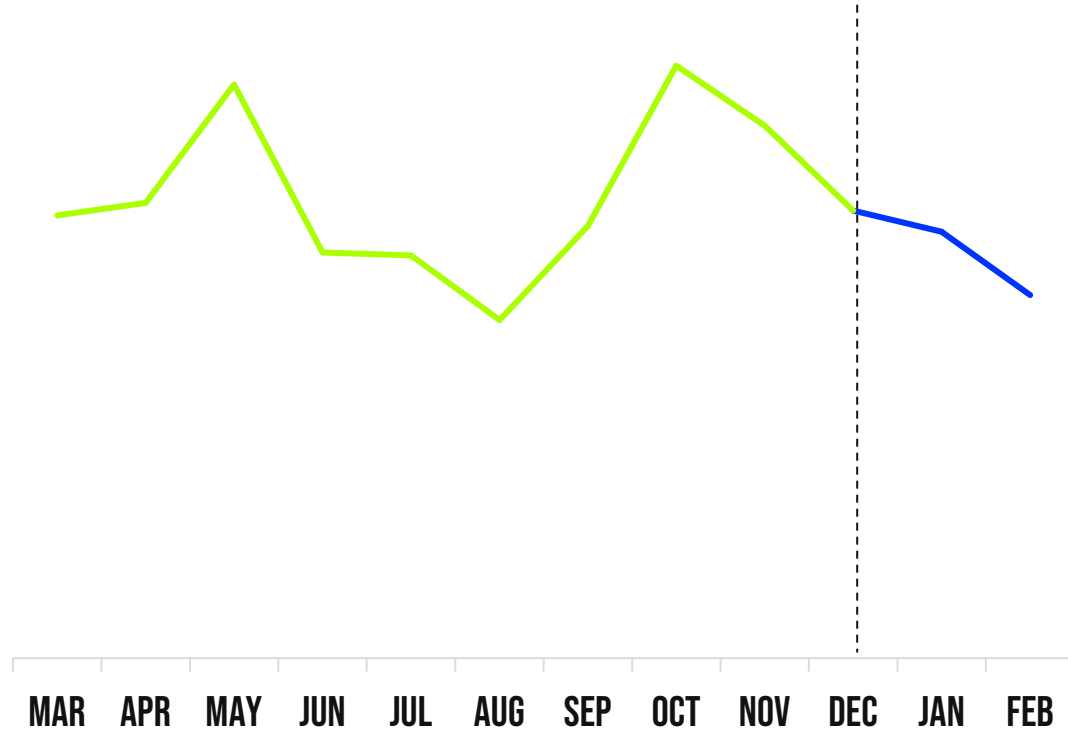


\*<https://www.ctvnews.ca/lifestyle/why-some-canadians-are-switching-to-a-plant-based-diet-in-the-new-year-1.6214523>

\*\*<https://www.foodincanada.com/food-trends/non-alcoholic-drinks-on-the-rise-as-demand-grows-153830/>

# 2023 SO FAR

LAST 12 MONTHS



JANUARY & FEBRUARY TOTALS - YEAR OVER YEAR



# TV GRPS

While the TV landscape continues to change, the 50+ demographic increased by 1.2% in terms of total GRPs.

## HIGHEST GRP INCREASES IN 2022

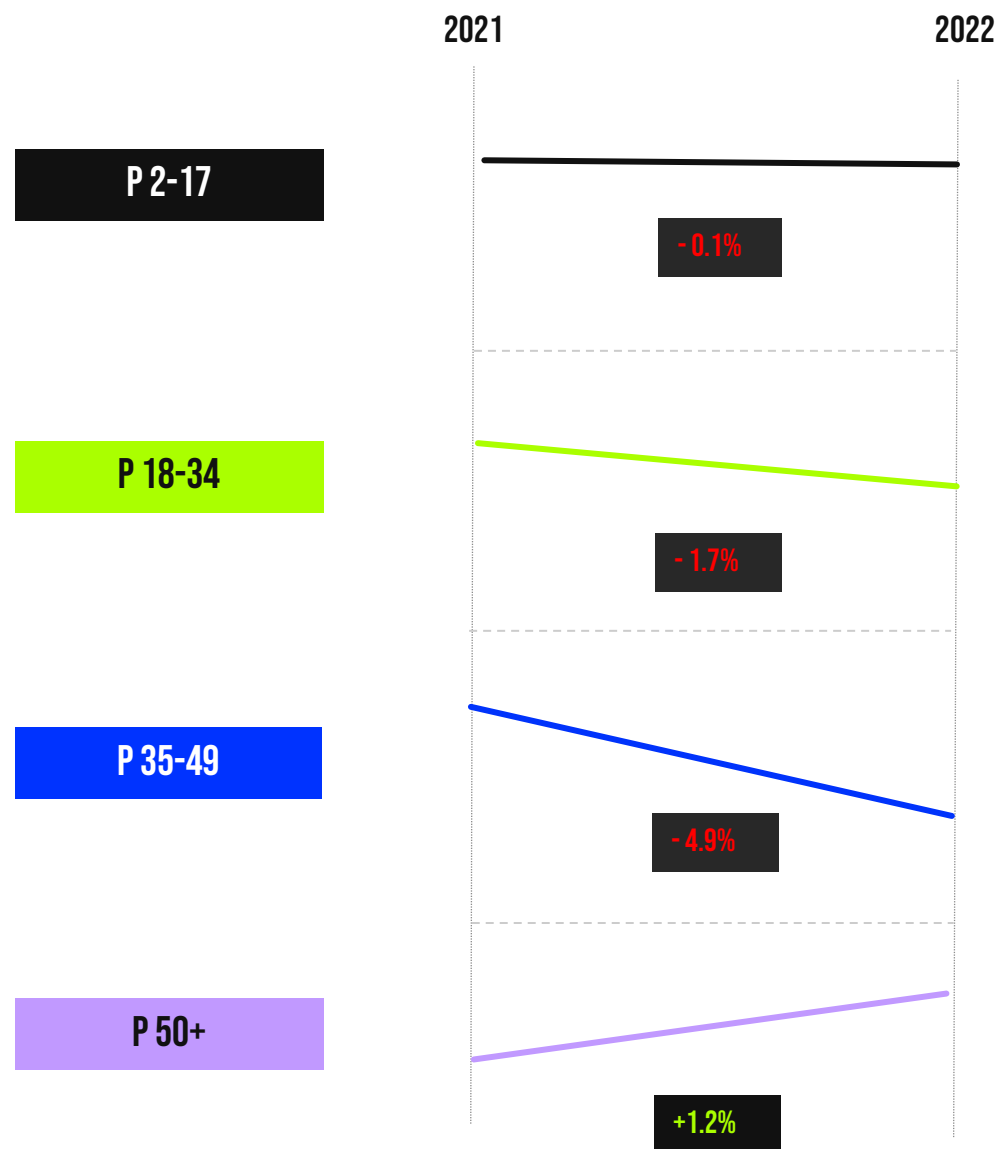
(BY GRP COUNT)

**+14%** RESTAURANTS, CATERING, NIGHT CLUBS

**+24%** ENTERTAINMENT

**+36%** TRAVEL & TRANSPORTATION

**+6%** RETAIL



# EXAMPLES OF TOP TV CREATIVES BY TOTAL GRPS FOR 2022 BY MARKET

## ENGLISH CANADA



**First run date: Dec 6, 2021**  
The redesigned 2022 Tiguan,  
“When inspiration strikes go after it”



**First run date: July 1, 2021**  
“Feel the difference with Downy”  
“let the sent set the mood”



**First run date: June 20, 2022**  
Use Trivago to compare hotels prices  
Laura paid less than Anna because of Trivago

## FRENCH QUEBEC



**First run date: Dec 20, 2021**  
“1 sheet of Bounty absorbs more  
than 2 sheets of the leading  
competitor”



**First run date: Feb 27, 2022**  
“1% maximum increase over the  
next 5 years”



**First run date Dec 6, 2021,**  
The redesigned 2022 Tiguan,  
“When inspiration strikes go after it”



**VICTORIA FILIPPINI**

**CUSTOMER SUCCESS DIRECTOR**

**VIVVIX**

# CREATIVE TRENDS IN 2022



# 2022 SAW AN INCREASE IN NEW MESSAGES AND UNIQUE CREATIVES

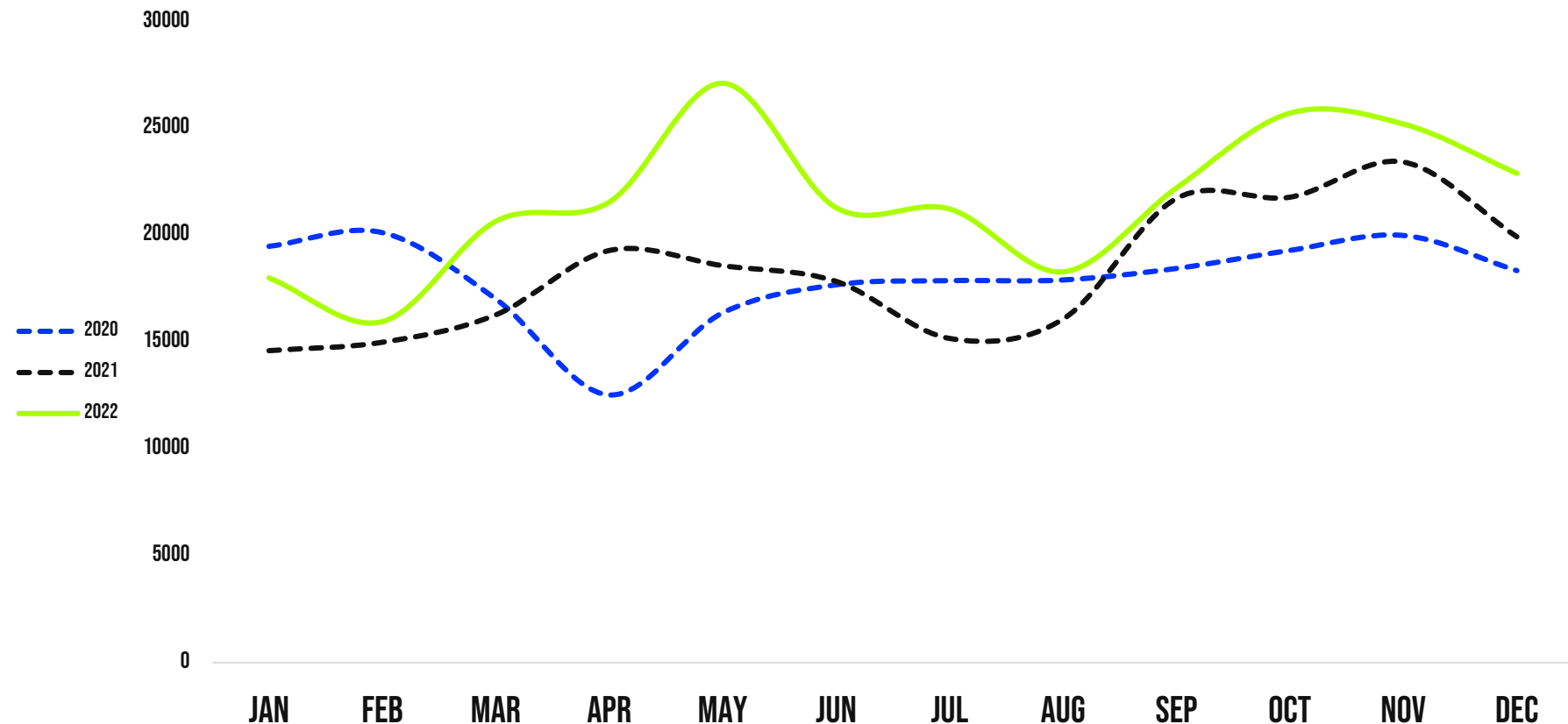
**+18%**

BREAKING CREATIVE COUNT  
COMPARED TO 2021

**+21%**

BREAKING CREATIVE COUNT  
COMPARED TO 2020

## MONTH OVER MONTH BREAKING CREATIVE COUNT



# AS THE WORLD SHIFTS INTO POST-PANDEMIC LIFE, WE SEE GROWTH IN SHOPPING MESSAGING

**+463%**

ECO FRIENDLY  
YEAR OVER YEAR

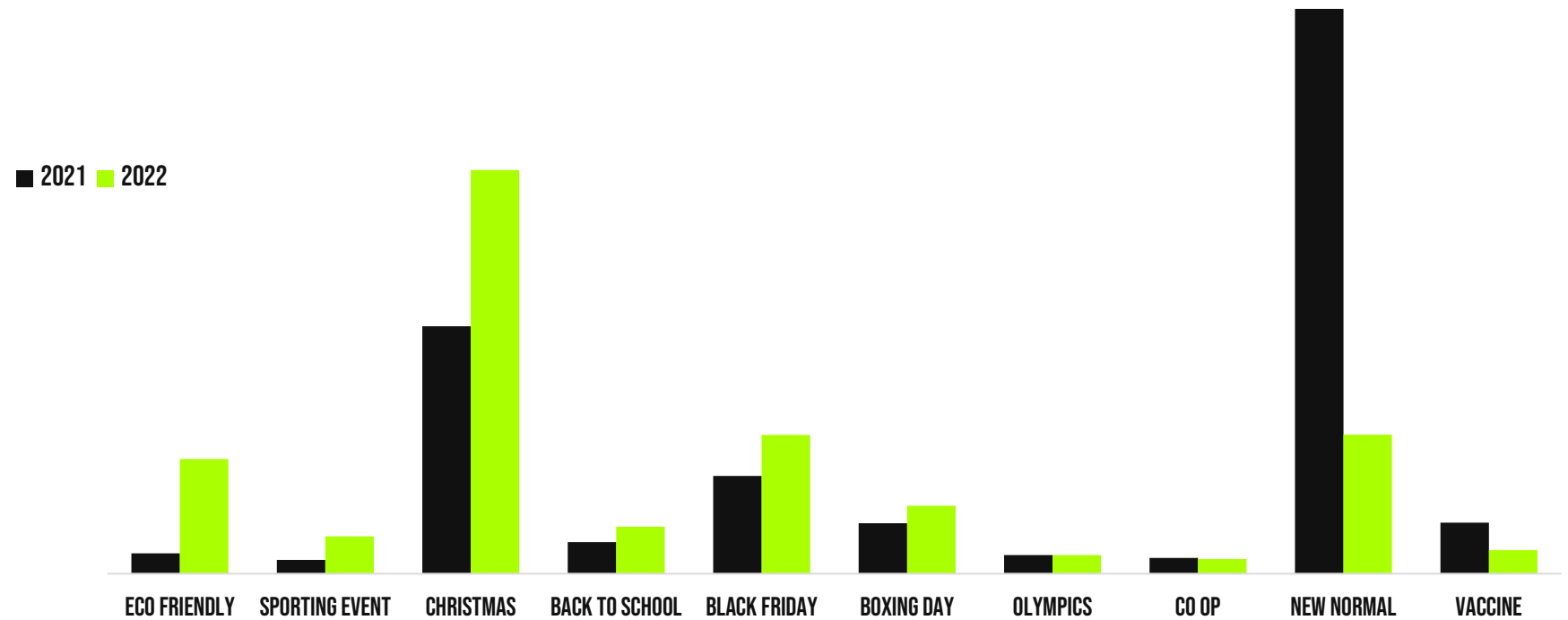
**+63%**

CHRISTMAS  
YEAR OVER YEAR

**+42%**

BLACK FRIDAY  
YEAR OVER YEAR

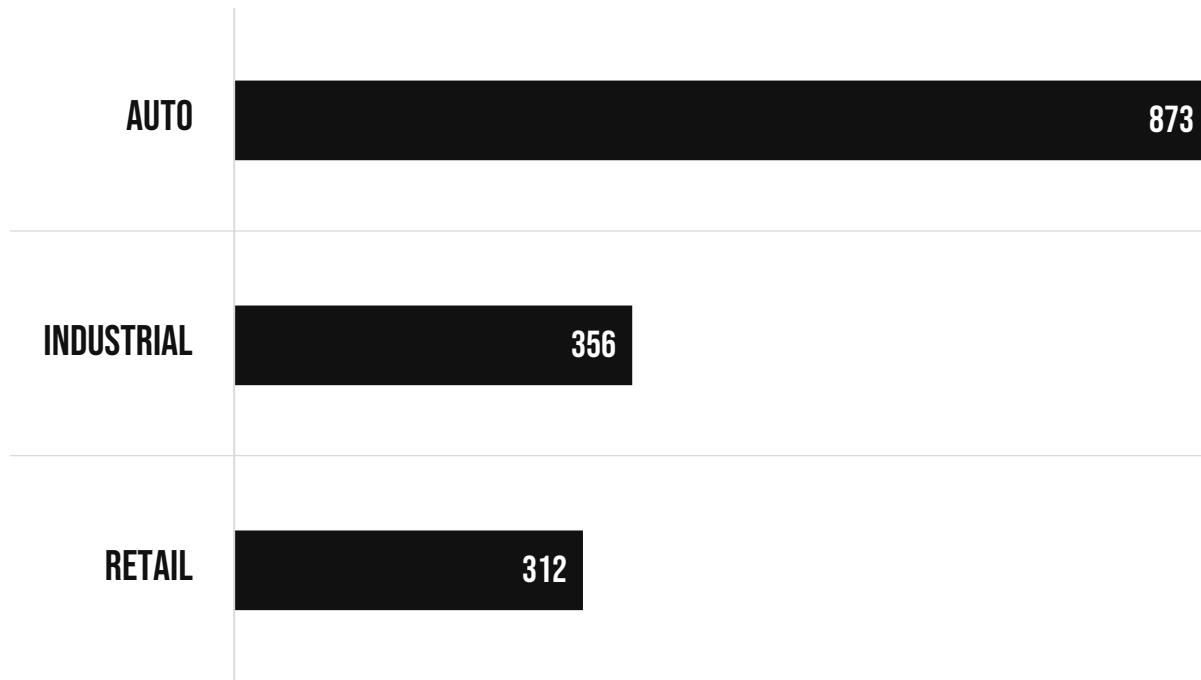
## TOP 10 MESSAGE ELEMENTS RANKED ON % CHANGE | 2021 VS 2022



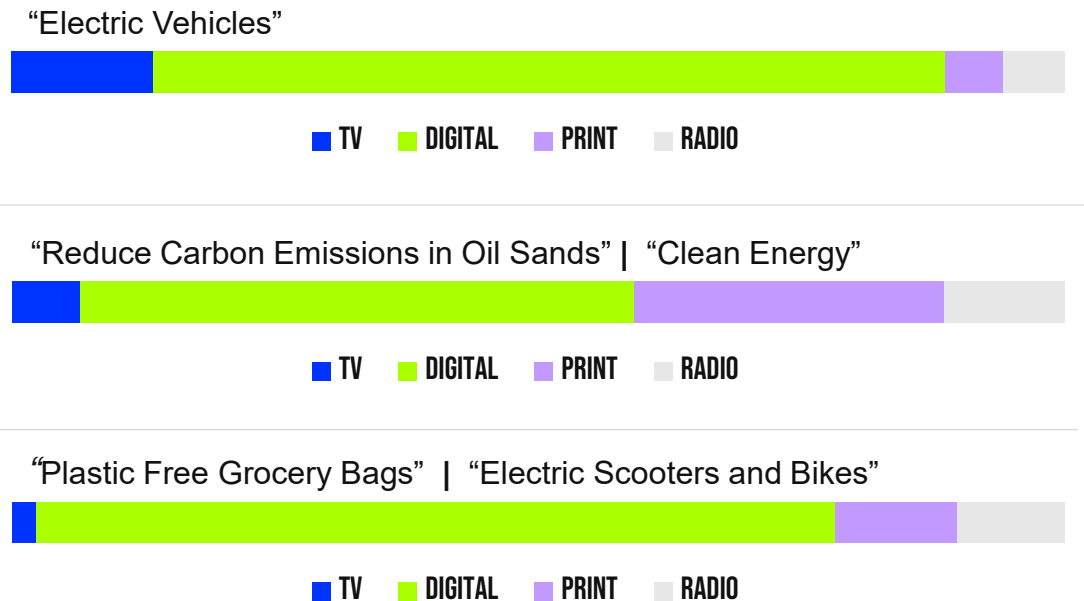
# ECO-FRIENDLY IS ON THE RISE

In 2022, there were 2,898 new ads containing “eco-friendly” messaging – a 463% increase from the previous year.

## TOP 3 CATEGORIES



## MESSAGE FOCUS



# CHANGING TIMES MEAN...EXCITING NEW CREATIVE

Canadian advertisers are evolving their messaging to keep pace with important social topics and new norms.



**DOVE**

**“CHANGE IS BEAUTIFUL”**



**AMAZON PRIME**

**“INTO ROCKING IT? IT’S ON PRIME.”**

# THE POWER MOVES

## BREAKING CREATIVE

In 2022, advertisers increasingly relied on **new messages**, putting out more new, **unique creatives** than over the past two years.

Creatives referencing **Eco Friendly** messaging saw a significant increase of 463% YOY, especially in the **Auto**, **Industrial** and **Retail** segments.

## ADVERTISING EXPENDITURES

Canada ad spend increases by 5% YOY, with **Digital ad spend** (including paid social) making up 54%.

**Online Gambling** and **Casinos** was the class with the largest increase in ad spend YoY, followed by **Television & Streaming Services**, and **Theatre**; **Sport Venues**; **Ticket Agents**; **Performers**

## TELEVISION GRPS

Subscription based viewing and other factors have created varying impacts on TV GRPs across demos, meaning TV advertising may be more impactful for some **age groups like P50+** over others.

The highest **rising** ad categories for TV viewership in 2022 were the most **negatively affected** industries in 2020.

# WHAT ELSE TO LOOK OUT FOR IN 2023

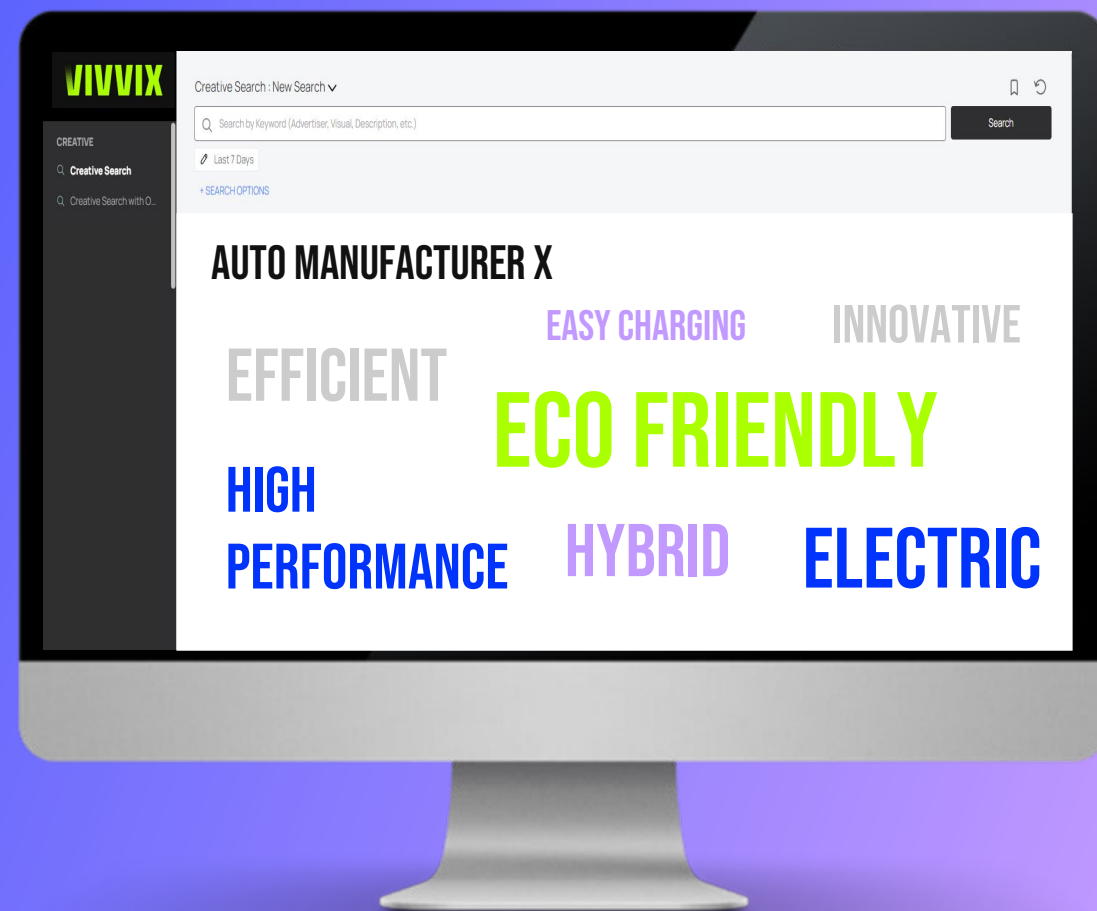
# COMING SOON!

## CREATIVE CLOUD: Q2 2023

Gain easy insights into competitive message strategies through our visual Creative metadata.

### Intel Includes:

- Lead Text and Headline
- Description Visuals
- Audio Transcripts
- Easy Export



## STAY TUNED FOR INSIGHTS HIGHLIGHTING THE QUEBEC FRENCH MARKET

# THANKS FOR JOINING US

When we do our job right, you have a full command of the facts.

For more insight, support and winning clarity, please reach out to [info@vivvix.com](mailto:info@vivvix.com).

**ASK US ABOUT OUR DIGITAL ENHANCEMENTS:  
EXPANDED PANEL & MOBILE APPS COVERAGE**

**VIVVIX**



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