

Digital Canada 2023

How do Canadians behave on social platforms? What are their thoughts on influencers? How effective is branded content and digital advertising? Do Quebecers consume media differently?

These questions are addressed by Digital Canada 2023 in a comprehensive review of online behaviour in Canada.

ressac

Leger

We live in unprecedented times. We're able to travel around the globe in a few hours. We can communicate with anyone else in the world. We can purchase almost anything using our watch from the comfort of our living room.

Life isn't perfect, of course. Technology has gone beyond enhancing our lives to become a necessity. Once upon a time, technology made our daily lives easier, but more and more, it feels like an obligation.

The pandemic has affected Canadians from coast to coast, dramatically accelerating their digital habits. Plus, with each new social network, each piece of content and each new device, the generational divide increases.

As a digital-first agency, ressac has always been in tune with the digital world and data culture to make business decisions with real and measurable impact. In 2021, we joined forces with Leger, the largest Canadian-owned market research and analytics company, solidifying our position. We're the kind of agency that is close with our clients, our teams and our industry. For nearly 17

years, we've been unrivaled in digital strategy, media performance and content creation for B2B, B2C and B2E. We believe data mining builds winning businesses in today's world and in tomorrow's. We have a saying– if it's not measurable, it's miserable.

Digital Canada 2023 confirms the power and relevance of the Leger/ressac alliance to meet tomorrow's challenges. If you need to increase your competitive advantage, support your digital transformation or simply add depth to your strategies, come discover our insightful guide to the digital world, created by enthusiasts, for enthusiasts.

Happy reading!

Table of contents

Using Social Platforms

- | | |
|----|---|
| 7 | Portrait of social media platforms. |
| 8 | Facebook still dominates web usage. |
| 9 | Favourite platforms on the podium. |
| 10 | What men and women prefer on the Web. |
| 11 | Everything about the podcast. |
| 12 | Your neighbour is probably leading a double life. |
| 13 | The two digital solitudes. |

Perception of Influencers

- | | |
|----|---|
| 16 | Influencer marketing across generations. |
| 17 | Influence across platforms. |
| 18 | Types of influencer content. |
| 19 | The influencer's new role. |
| 20 | Influencers and the consumer decision making process. |

Perception of branded content

- | | |
|----|---|
| 23 | Who follows brands or businesses on social media? |
| 24 | To each generation their own when following brands. |
| 25 | The in-person shopping experience. |
| 26 | The mantra of those 55 and over. |
| 27 | The digital world is changing. |
| 28 | Why do we unsubscribe from a brand? |

Perception of online advertising

- | | |
|----|----------------------------------|
| 31 | The impact of personalized ads. |
| 32 | Sharing data. |
| 33 | Canadians' distrust. |
| 34 | Consumers can't be fooled. |
| 35 | Young consumers and advertising. |
| 36 | The traditional media approach. |
| 37 | Local advertising. |

Methodology

Process

A Web survey was conducted with Canadian Internet users.

Population

Representative sample of 3,000 Canadian Internet users who are English- or French-speaking and 16 years of age or older.

Timeline

Data was collected from August 1 to 12, 2022. The median length of the web-based interviews was 13 minutes.

Weighting

Results were weighted according to age, language, gender, region, education and the presence of children in the household in order to ensure sample representativeness.

Using Social Platforms

Using Social Platforms.

No surprise, social platforms continue to be the first place users go online. What is in fact surprising is the data we dug up and analysed revealing the biggest trends and subtrends to watch out for.

Facebook still dominates web usage.

Instagram packs a punch.

Women prefer visual social media, while men are more drawn to text-based social media.

More and more people are listening to podcasts.

Many Canadians have multiple accounts on a single social platform.

Quebecers don't use social platforms in the same way as in the ROC.

A really big chart.

A credible study can never truly be complete without a really big chart! Here is the percentage of Canadian Internet users who have an account on social platforms and messaging apps :

| Platforms | Total | Women | Men | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ |
|-----------|-------|-------|-----|-------|-------|-------|-------|-------|-----|
| Facebook | 83% | 87% | 79% | 79% | 90% | 87% | 83% | 83% | 78% |
| Messenger | 77% | 82% | 71% | 76% | 84% | 81% | 77% | 75% | 70% |
| YouTube | 63% | 58% | 69% | 91% | 80% | 74% | 63% | 49% | 40% |
| Instagram | 57% | 64% | 50% | 85% | 84% | 65% | 55% | 43% | 32% |
| Pinterest | 42% | 58% | 23% | 56% | 51% | 43% | 39% | 36% | 33% |
| LinkedIn | 39% | 34% | 44% | 43% | 51% | 46% | 40% | 37% | 23% |
| WhatsApp | 39% | 38% | 41% | 50% | 54% | 52% | 41% | 29% | 21% |
| Twitter | 37% | 32% | 42% | 49% | 48% | 40% | 40% | 30% | 23% |
| Snapchat | 28% | 32% | 24% | 74% | 60% | 29% | 18% | 7% | 2% |
| TikTok | 27% | 30% | 24% | 62% | 47% | 33% | 20% | 12% | 7% |
| Reddit | 20% | 15% | 26% | 42% | 41% | 28% | 14% | 8% | 2% |
| Discord | 18% | 13% | 24% | 53% | 33% | 18% | 12% | 6% | 3% |
| Twitch | 12% | 8% | 16% | 34% | 24% | 14% | 8% | 3% | 1% |
| Other | 13% | 15% | 12% | 31% | 20% | 12% | 11% | 8% | 5% |

⚠ For fans of the digital counter-culture, 4% of Canadian Internet users said they have no account on these social networks or messaging apps.

Facebook
still dominates
web usage.

83%

of Canadian internet users have an
account.

Daily Facebook usage by age group among those who have an account :

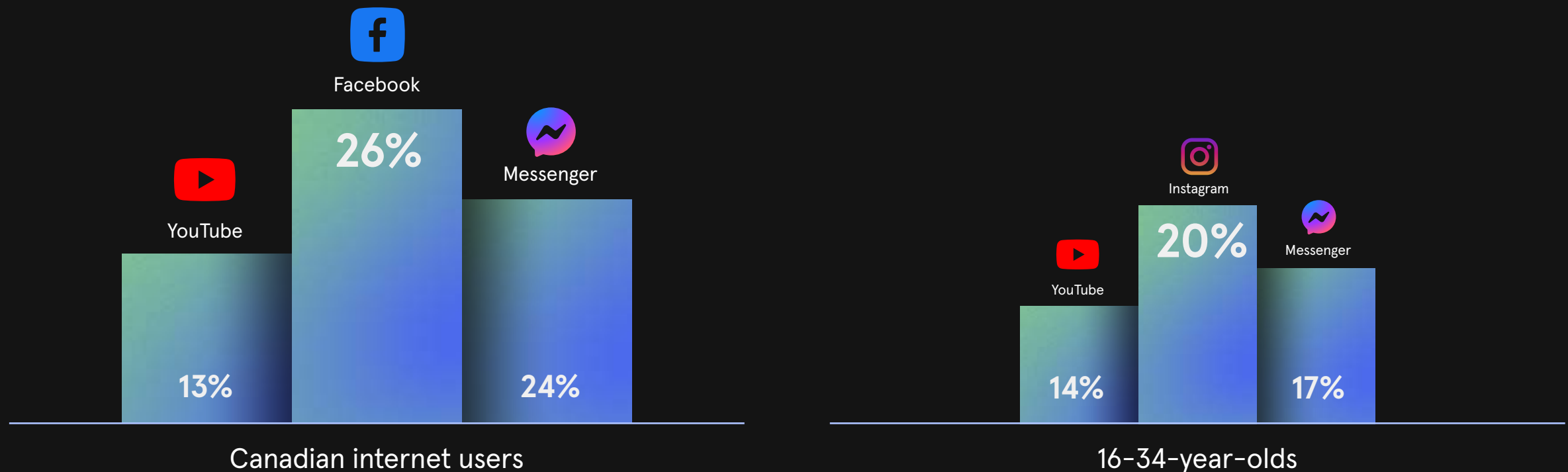


Facebook is popular, that's nothing new.

The vast majority of the population has a Facebook account, regardless of their socio-demographic profile. There is, however, a marked difference in how different age groups use the platform, creating a generational divide.

If you could only keep **one** social media or messaging app, what would it be...?

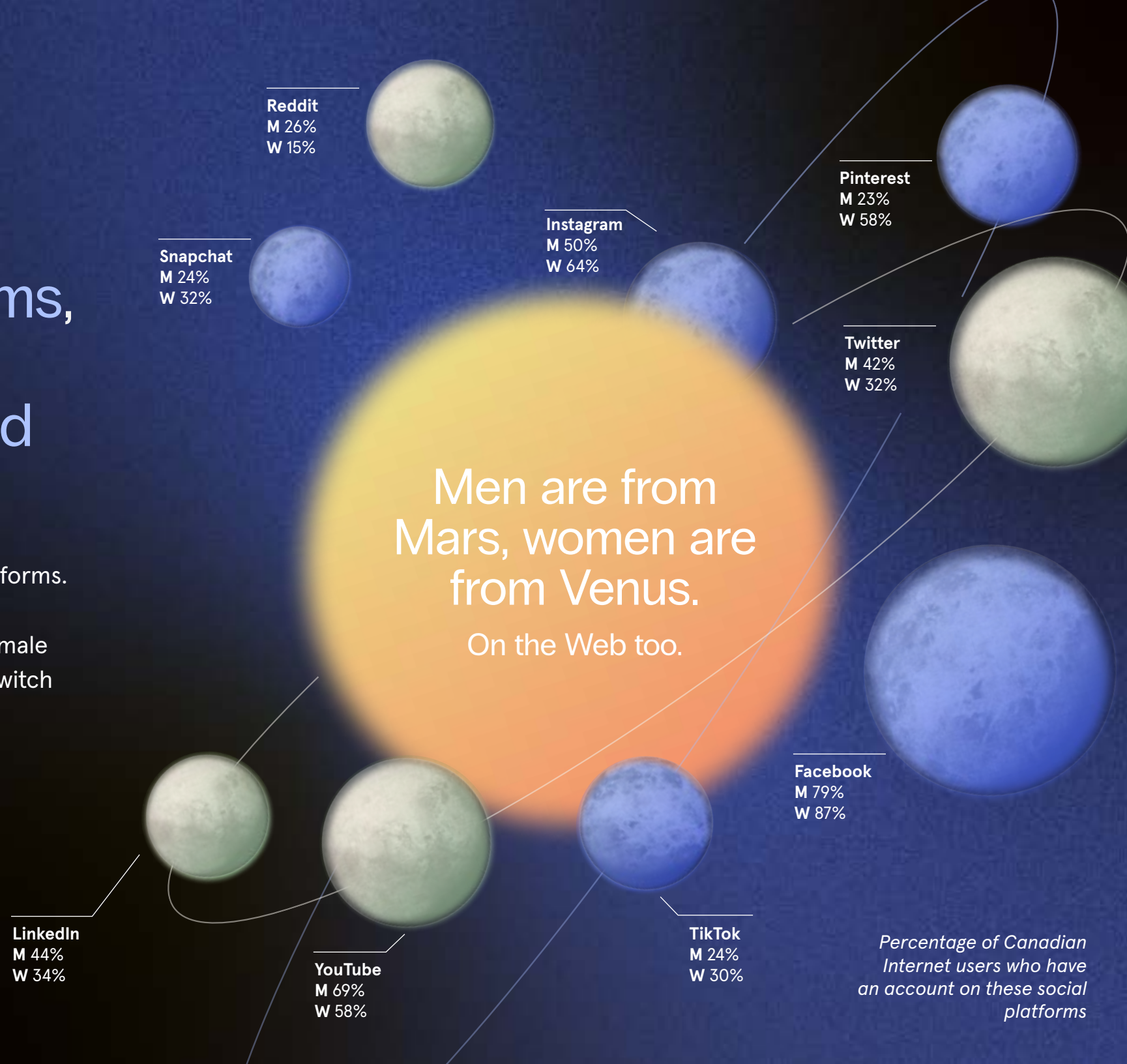
When Canadian Internet users who use social media were asked this question, the result was unanimous, except among the 16-34 age group. They also use Facebook, but they prefer Instagram.



Women generally prefer visual platforms, while men gravitate to more text-oriented mediums.

Gender specific behaviours exist across all platforms.

Pinterest, Snapchat and TikTok have a larger female user base, while LinkedIn, Twitter, Reddit and Twitch count more male users.



Podcasts put Canadians on the same wavelength.

56% of Canadian Internet users listen to podcasts and 25% say they do so at least once a week.

For now, podcasts remain an elitist medium. It is significantly more popular among the wealthiest and more educated.

Podcasts are a growth vector and an opportunity for advertisers who wish to reach audiences interested in specific topics or with more niche interests.

*Canadian internet users who listen to
podcasts at least once a week*

40%

16-34

26%

35-54

12%

55+

Your neighbour is probably leading a double life.

Nearly one in five Canadian Internet users manage more than one personal account on the same social media platform or messaging application.



When asked why, the most popular answers were:

45%

To keep certain things private.

32%

The themes vary on each of my accounts.

26%

My accounts are for different people.

24%

To view content without being recognized or to remain anonymous.

The two digital solitudes.

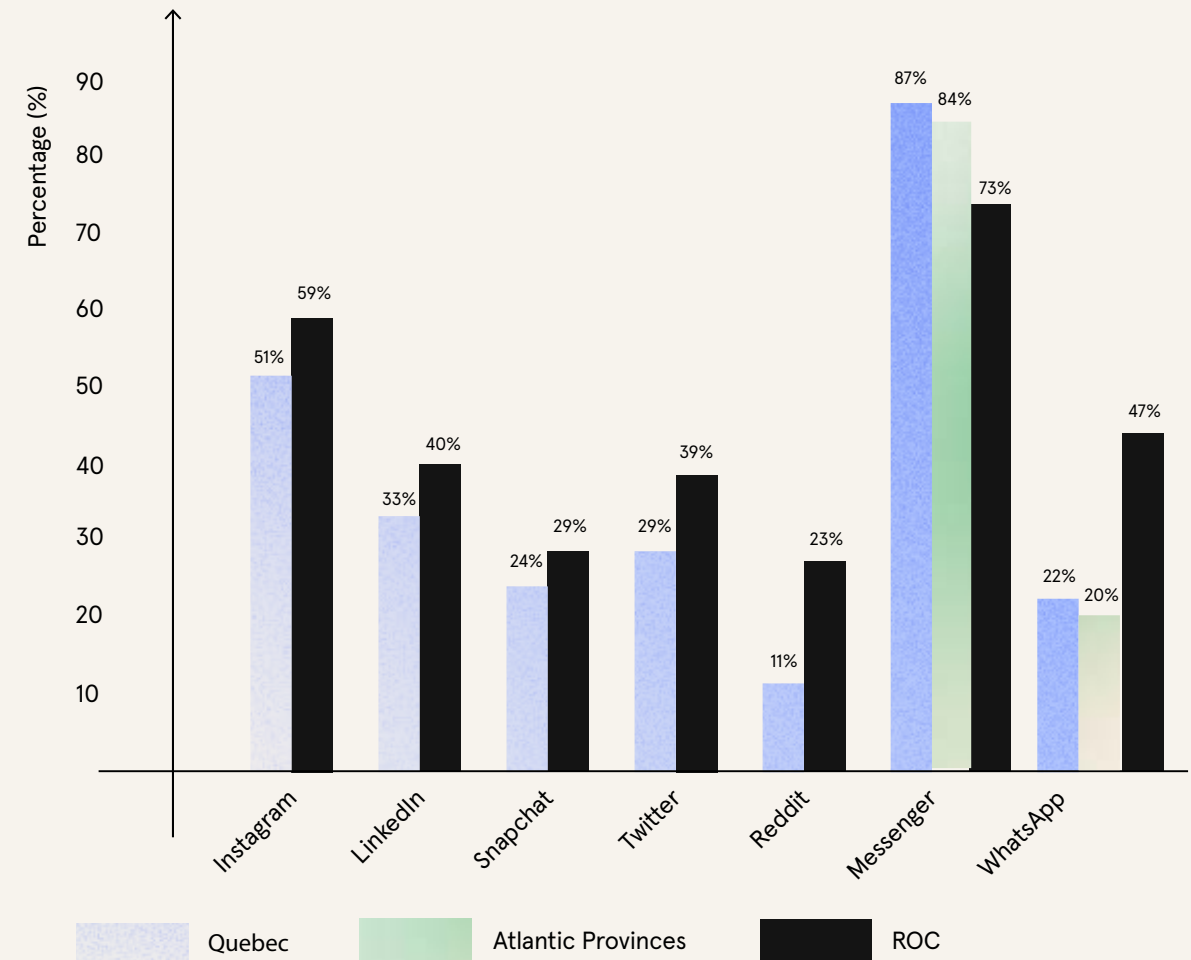
From coast to coast: how Canadian Internet usage varies.

On the following social platforms, Instagram, LinkedIn, Snapchat, Twitter and Reddit, Quebec users are less present on Instagram, LinkedIn, Snapchat, Twitter and Reddit compared to the ROC.

Can we blame it on the language barrier? The lack of French content? Or is it simply a matter of Quebecers being culturally behind in adopting non-conventional platforms?

In terms of instant messaging, Quebec and the Maritime provinces communicate mainly on Messenger, while the ROC favours WhatsApp.

**Digital Presence:
Quebec vs ROC**
(Percentage of Canadian Internet users who have an account)



Perception of Influencers

Perception of Influencers.

Whether you love them or love to hate them, influencers are here to stay. The numbers don't lie, influencers and content creators are real vectors of action. They affect not only our purchasing behaviour, but also the perception and opinions of a brand or product. In this sense, they can no longer be perceived as mere media placements, but rather as real players in a brand strategy.

Of course, whenever a few influencers make the headlines, overall influencer credibility takes a hit. Yet as collaborators they bring expertise to the table, especially niche influencers who have carved out their own specialties online and who can boost a brand and even help educate a clientele.

There is a huge generational gap when it comes to influencers.

Influencers, new opinion leaders.

A significant role in purchase choices.

Income doesn't necessarily affect how consumers are influenced by a post.

Instagram: A highly influential platform.

Two-thirds of Canadians believe influencers and content creators are credible.

Influencers and the generational gap.

Nearly one-third of Canadian Internet users (31%) follow influencers or content creators.

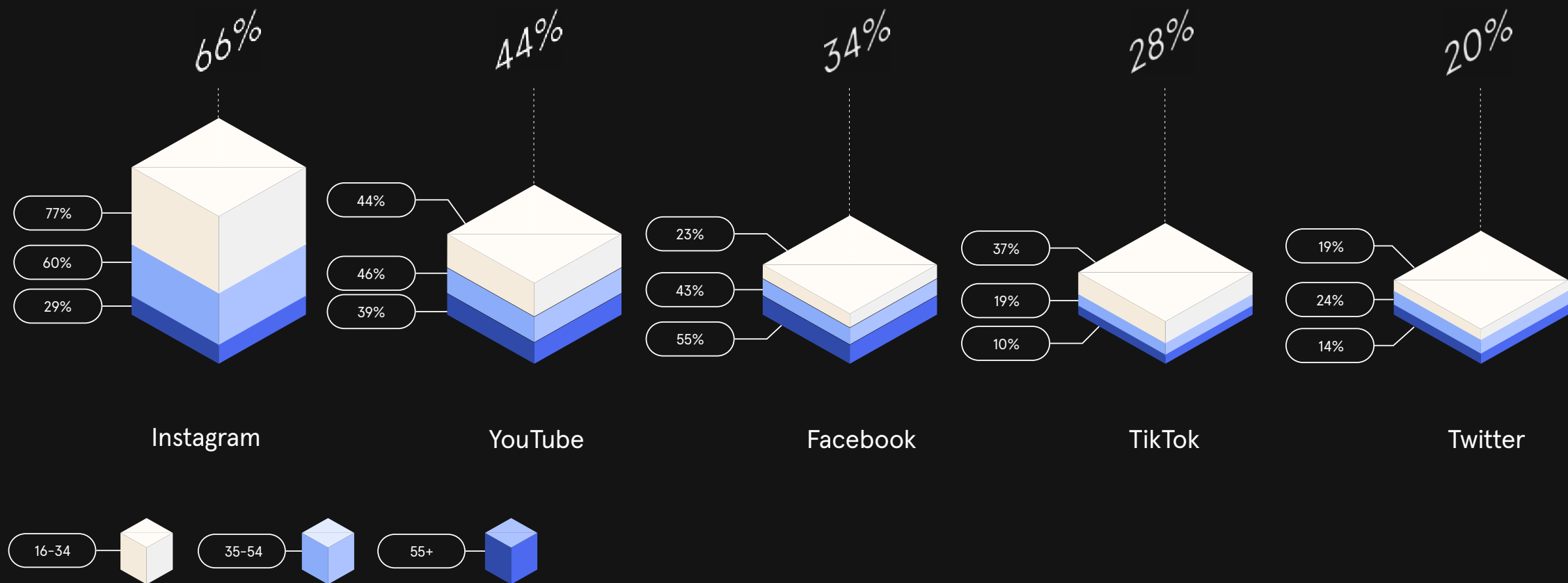
1/3

Percentage of Canadian Internet users who follow influencers or content creators:



Influence across platforms.

In general, Canadian users follow influencers or content creators on Instagram. See above, for a more specific breakdown by platform and age group.



An influencer for everyone.

There are so many different types of influencers and content creators. Some might seem to lack substance or simply want attention; however, we find that those who dedicate themselves to a more specific sphere earn their stripes. Regional attachment is also very real. Canadian Internet users like to follow artists from their province. Beyond the purely product-oriented content (fashion, foodie, lifestyle), there is also a form of support for everything local on social media.

Percentage of Canadian Internet users who subscribe to influencers or content creators who follow...

Web content creator 56%

Canadian artists 33%

Activists, advocates or those who fight for causes I care about 24%

Subject matter experts or professionals 39%

Artists in my province 32%

This statistic is significantly higher in Quebec than in the ROC (41% VS 30%)

Sports personalities 24%

Reality TV stars 20%

International artists 34%

Entrepreneurs / business leaders 27%

People involved in politics or opinion leaders 22%

Video game experts 2%

Influencers, the new opinion leaders.

Influencers are attracting more and more users and their role in user behaviour is growing. Plus evidence shows they have the power to shape public opinion online.

73%

of Canadian Internet users who follow influencers and content creators say they have already changed their views or perceptions on a topic after being exposed to this type of content.

73%

(yes, again)

of Canadian Internet users who follow influencers and content creators say they have already changed a habit (to adopt a healthier lifestyle, boost self esteem, improve health, etc.) after being exposed to this type of content.

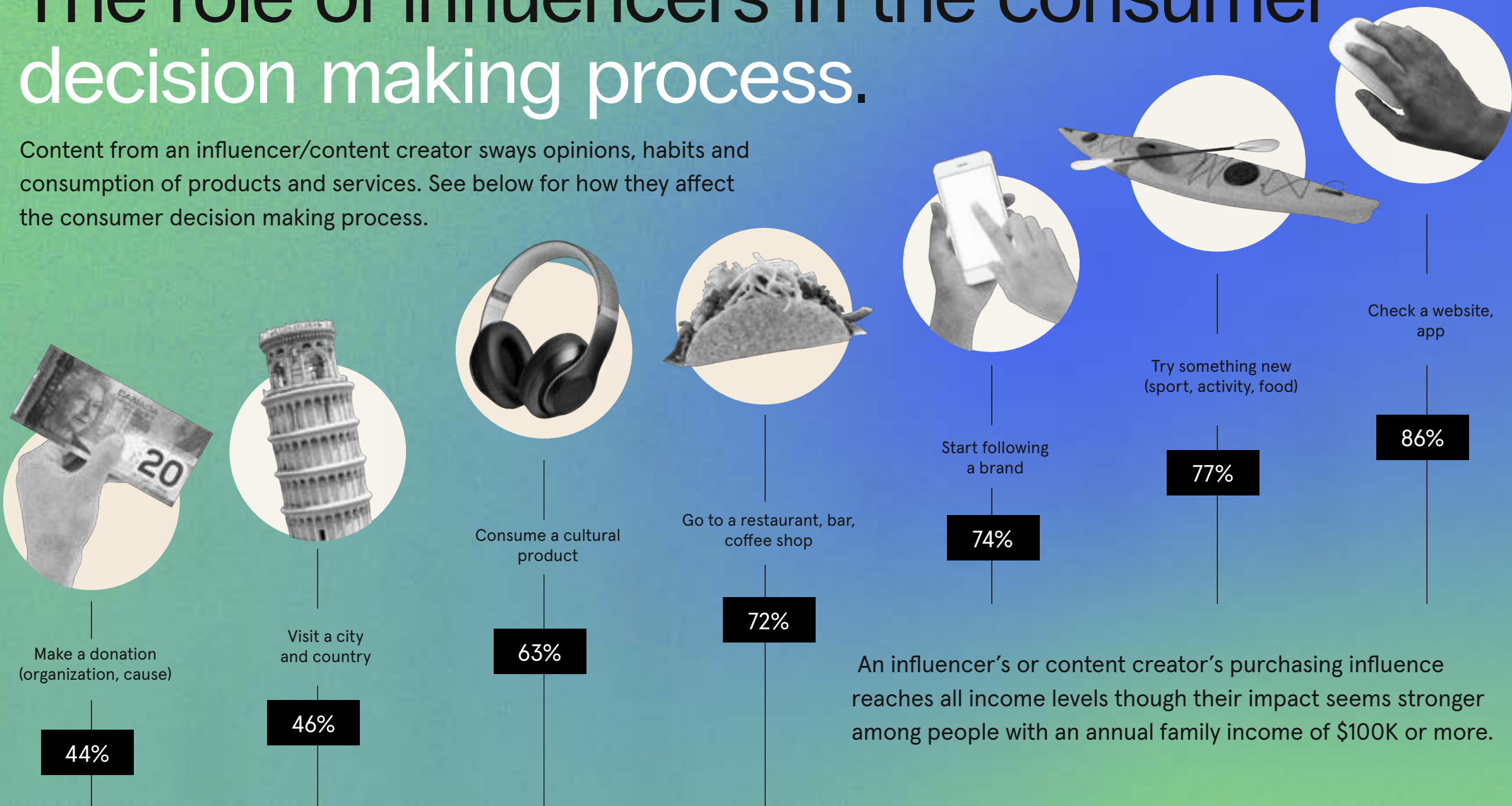
73%

(yes, yes, again!)

of Canadian Internet users who follow influencers and content creators say they purchased (a product/ service) after being exposed to this type of content. Specifically, 14% say they “often” make a purchase or subscribe to a service and 59% say they “sometimes” do.

The role of influencers in the consumer decision making process.

Content from an influencer/content creator sways opinions, habits and consumption of products and services. See below for how they affect the consumer decision making process.



Perception of branded content

Perception of branded content

Shopping in-stores. Advertising. Visiting a branded site. There must be a trigger to generate any user's interest in branded content. While Canadians are still reluctant to follow brands on social media, many do report following brands after being exposed to one of these triggers.

Branded content gains more traction among young people.

To each generation their own when following brands.

The in-store experience remains crucial.

Learn more before joining, the mantra of those 55 and over.

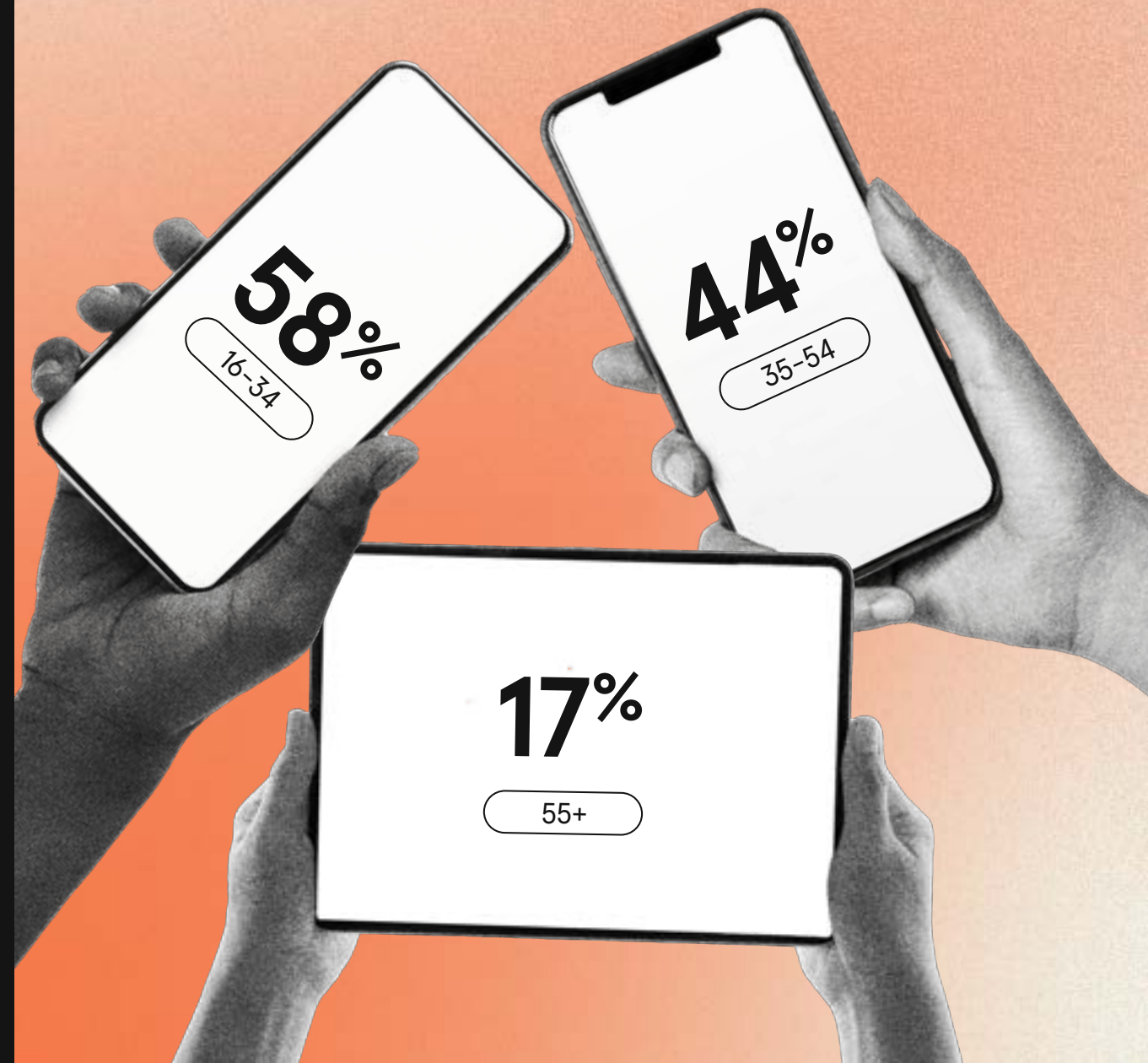
Underestimate the influence of advertising on a brand's visibility at your own risk

The main reason for unsubscribing is lack of brand relevance.

More than one in three Canadians follow a **brand or company** on social media.

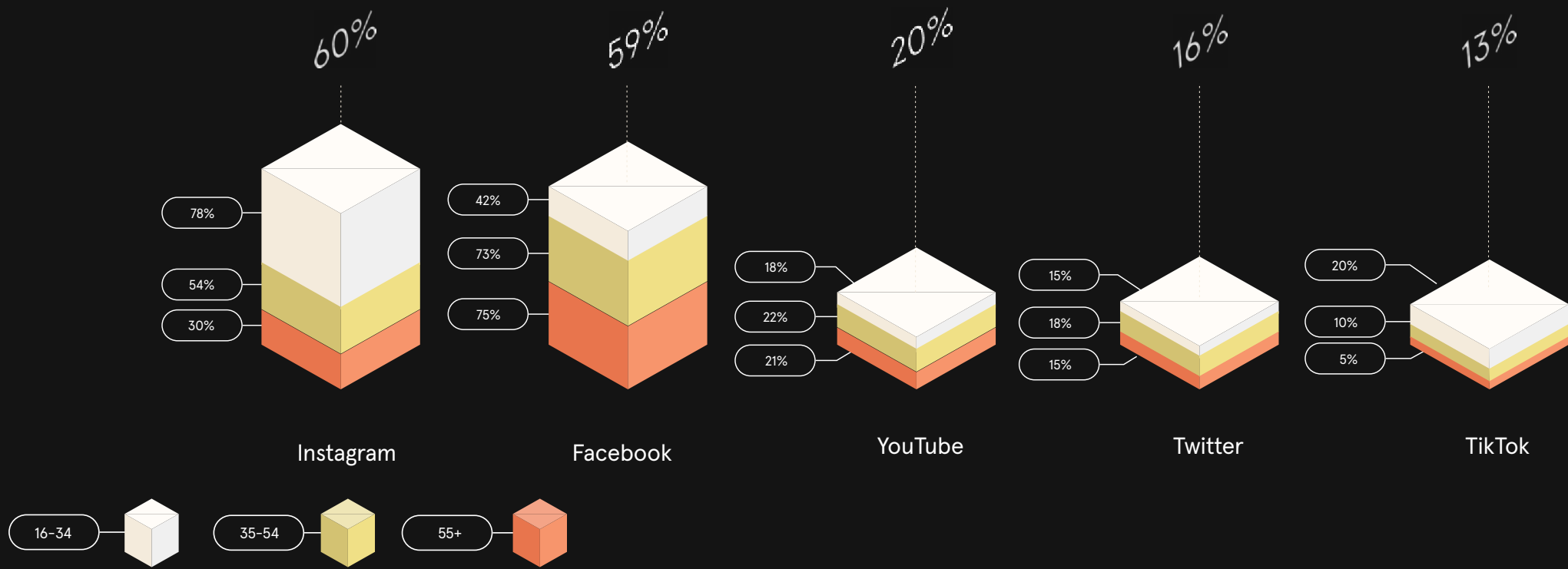
37%

Percentage of Canadian Internet users who follow brands or companies on social media :



To each **generation** their own when following brands.

It's interesting to note that different age groups use different platforms to follow brands. Here is the percentage of Canadian Internet users who follow influencers and content creators by platform and by age group.



In-person shopping is still an integral part of the consumer journey.

While online shopping is a growing phenomenon, in-person shopping is still an integral part of the consumer journey.

81% of Canadian Internet users who follow brands/ companies online say they started to do so after setting foot in a store or visiting a business. A significant trend across all age groups.

81%



Learn more before joining, the mantra of those 55 and over.

87%

of Canadian Internet users who follow a brand or a business say they started doing so after visiting their websites.

This allows us to assert that websites still have an important place in the user journey and that it's important to keep it up to date. Websites make users want to access more content and stay informed of the latest developments through the news feed on their social platform.

92%

This figure is significantly higher among Canadian Internet users 55 and over, 92% of whom have followed a brand after consulting the website.

The digital world is changing, but advertising is here to stay.

Underestimate the influence of advertising on a brand's visibility on social media at your own risk!

Advertising continues to exert persuasive power despite the rapid transformation of the digital world.

Percentage of Canadian Internet users who follow a brand or a company and who say they started following them after seeing...

a sponsored ad on social media

73%

an ad elsewhere on the Web (e.g., banner)

66%

Why do we unsubscribe from a brand?

60%



The brand is boring.

60% of Canadian Internet users who follow a brand or company say they will unsubscribe from an account if the content is uninteresting (useless, boring, etc).

Unsurprisingly, Canadian Internet users are more likely to follow brands or products that put out advertising that leads to a more valuable, enjoyable internet experience (funny, entertaining, informative, original, etc.). 70% of the 16-34 age group agree with this statement making them especially discerning when it comes to advertising.

50%



The brand's values don't resonate with me.

50% will unsubscribe if a brand's values don't align with their own and 21% because they don't want to be associated with this particular brand. Corporate values are increasingly at the heart of consumer priorities and this should be reflected in the content shared.

50%



The brand reaches out too often.

50% of Canadians unsubscribe when a brand posts too frequently. Conversely, 11% of Canadians indicated that they unsubscribe if the brand does not post often enough. No magic formula can predict how often to post on a brand's social platforms. However, always avoid bombarding your audience with content.

Perception of online advertising

Perception of online advertising.

As the digital offer evolves, so does the consumer's perception of advertising. Consumers want content that matches their needs and interests, both in terms of the offer and the format. In other words, when brands put out forced generic advertising it increases the users' negative impression of the brand.

The more personalized the ad, the higher the engagement.

We all like personalized offers, but we also like privacy.

Canadians remain wary online.

Three-quarters of Canadians consider branded content credible.

Young consumers will pay to avoid ads.

The traditional media approach doesn't cut it in the digital world.

Local advertising gets a thumbs up.

A close-up, black and white photograph of a laptop. The laptop is open, and the screen is the primary focus. On the screen, there is text in a mix of black and green fonts. The text is slanted upwards from left to right. The keyboard of the laptop is visible at the bottom of the frame, and the laptop's bezel is visible on the left and top edges.

The more
personalized
the advertising,
the higher the
engagement.

78%

of Canadians don't like digital advertising in the broadest sense. Most of them try to avoid ads on the Web by using private browsing, an adblocker, etc.

Among Internet users who say they don't like digital advertising in general, it's interesting to note that 75% do, however, follow influencers or content creators, and 74% follow brands/businesses on social media.

51%

On the other hand, 51% of Canadian Internet users say they like online ads that are tailored or customized to their interests and passions. In general, Canadian Internet users who are present on social media and follow influencers or content creators are more likely to appreciate personalized advertising.

If you read between the lines, content is king. Traditional advertising can be boring. Though internet users are well aware that influencers are selling a product/brand/lifestyle they are easily more tolerated.

I'll give you a follow, but **not my info.**

Paradoxically, even though nearly half of Internet users appreciate content and ads that are personalized, only 1 in 4 Canadian Internet users are open to the idea of sharing more personal information on digital platforms in order to improve or personalize their online experience.

In an era where data privacy is a societal issue and a major concern for businesses, there is a golden opportunity for brands and media to develop creative and transparent strategies to generate their first-party data.

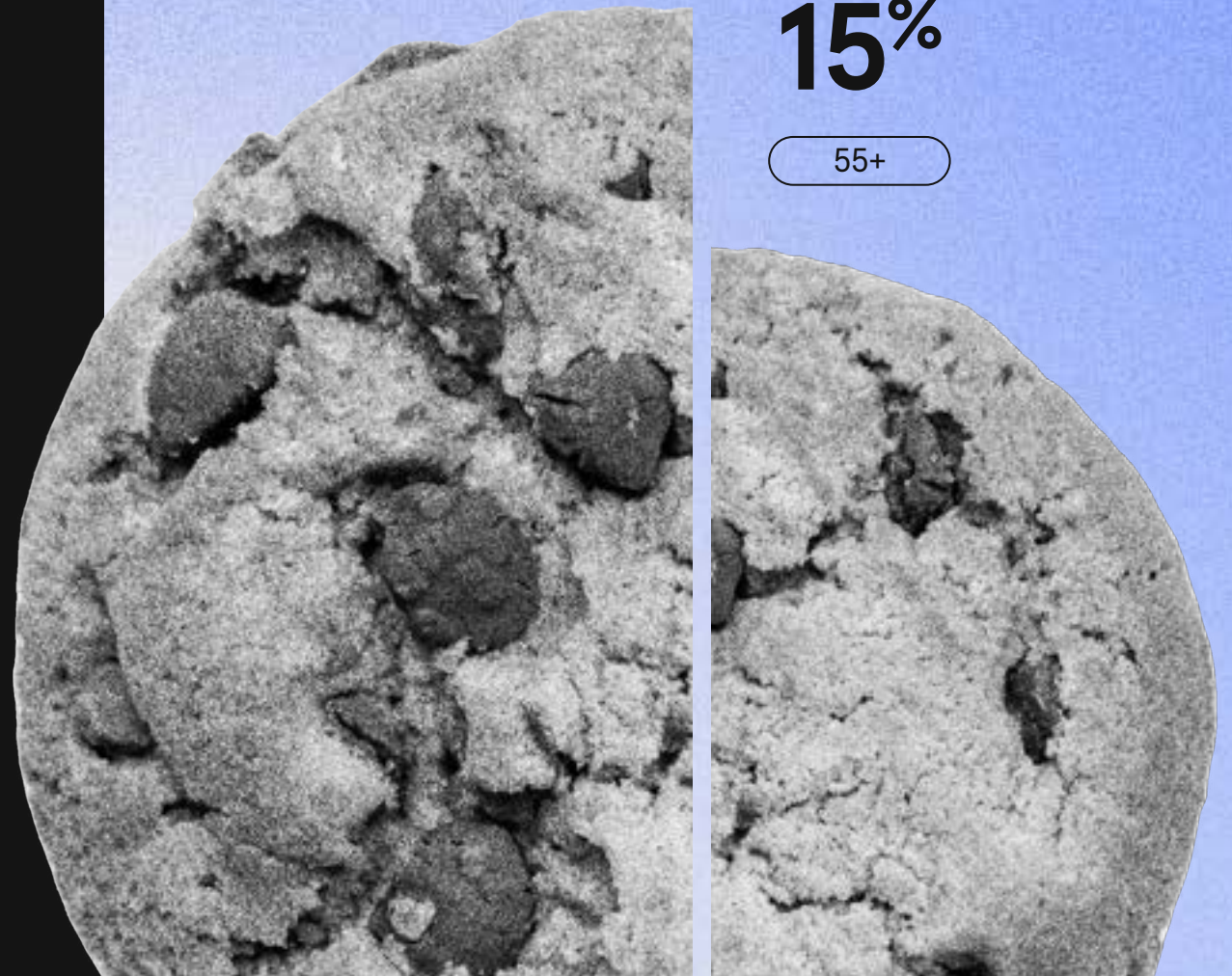
There is a marked generational divide, with those aged 16-34 being significantly more open to sharing information for a personalized experience, and those aged 55 and over being significantly less so.

38%

16-34

15%

55+



True or false?

Canadians believe they are capable of discernment.

55 % of Canadian Internet users say they can distinguish between what is true and false on digital platforms. They therefore feel confident in the content they find online.

On the other hand, 56% of Canadian Internet users say they are “very suspicious” when browsing digital platforms and feel that they are being observed when online.

Men

59%

(vs. 54 % for women)

Distrust is significantly higher among...

Quebecers

61%

(vs. 55% in the ROC)

Respondants 55+

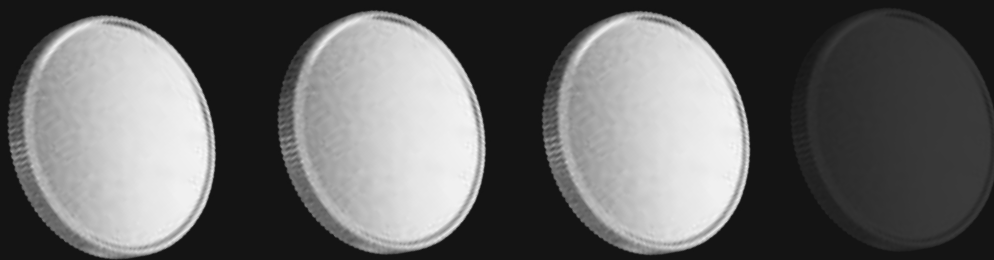
65%

(vs. 51% and 52%
among those 16-34 and 34-54)

Consumers can't be fooled.

3/4

Nearly 3 out of 4 Canadian Internet users say it's clear to them when a company or influencer/content creator is paid to talk about a product or service.



66%

of Canadian Internet users who follow influencers/content creators consider that the content they post is credible. 60% say they can "generally trust" and 6% say they can "always trust" the content.

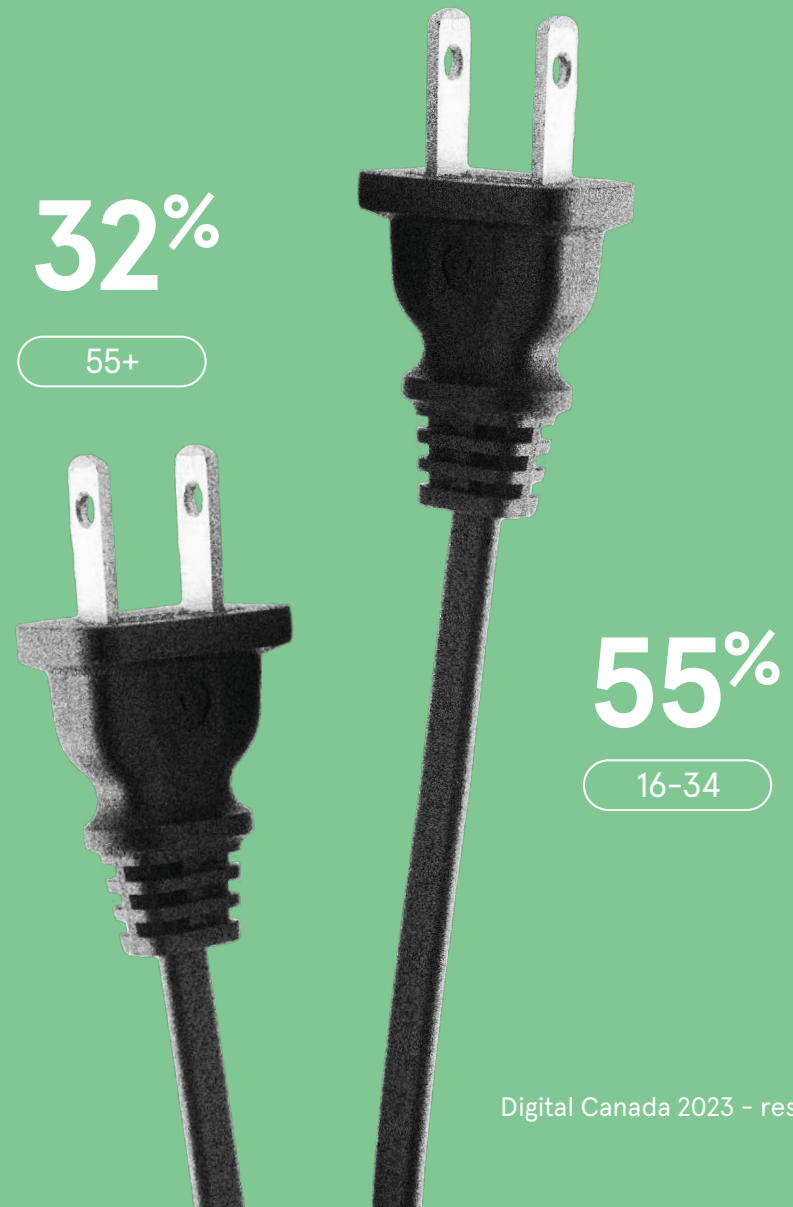
79%

of Canadian Internet users who follow brands or companies consider that the content they post is credible. 73% say they can "generally trust" and 6% say they can "always trust" the content.

Young consumers are known for their ad avoidance and will pay for it.

Although 42% of Canadian Internet users are willing to pay for ad-free content, Canadian Internet users 55 and over essentially favour free access to media (ad monetization), while among the 16-34 age group, there is a growing trend towards paid access to local platforms and media. In fact, 55% of this segment of the population say they are willing to pay for access to a news media or streaming platform to avoid seeing ads, compared to only 32% of those 55 and over.

Percentage of people ready to pay to avoid seeing ads.



The traditional media approach doesn't cut it in the digital world.

In plain English: "Stop spamming people with pre-roll, they are looking for interesting content".

89%

The message is clear: 89% of Canadian Internet users do not like pre-roll video ads that force them to watch an ad in its entirety.

47%

On the other hand, video ads that can be skipped after a few seconds are appreciated by nearly half of Canadian Internet users (47%).

79%

In terms of posting frequency, 79% of Canadian Internet users have a negative perception of a brand if they see the same ad several times in a short period of time.

76%

Ad retargeting, which often plays a role in high-frequency posting, is disliked by 76% of the population.

Local advertising is a hit.

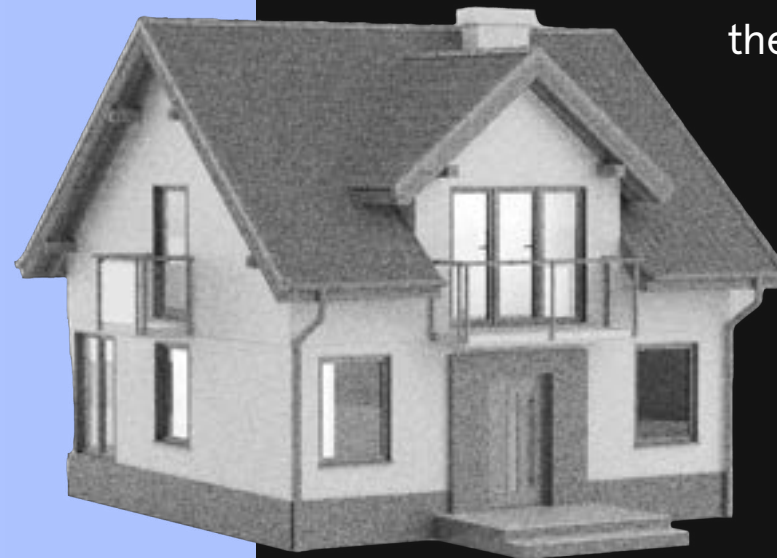
67%

Canadian Internet users are clearly in favour of local businesses increasing their advertising placements with local media.

This statistic is significantly higher in the Atlantic provinces, where 74% of Internet users support an increase in local advertising investment.

It's clear that digital advertising formats and strategies must adapt to user preferences and follow trends. The Big Five (GAFAM) and local media groups have been able to do this over the years by developing advertising products adapted to these new forms of media consumption.

Considering the frustration created by the advertising products still offered today by most local media, a clear dichotomy is emerging, and more than ever, most local media must innovate in their approach.



We mind your business.

When it comes to your digital marketing vision, in short, count on us as allies. We've got the mindset to create a compelling vision and the wings to deploy it.

If you're as excited as we are about the launch of our digital study and the possibilities for your organization, let's talk.

At ressac and Leger, we want to propel clients to the next level and we believe digital is a way to get there. We adapt to your business reality and bring our extensive experience working with dozens of industries in Canada and across the globe to ensure you get results.

We offer personalized digital strategy, performance media and content creation support.

What we do:

- Content strategy development and production management
- Deployment of performance-driven plans to increase sales and brand awareness
- Performance-driven digital ecosystem analysis
- Employer brand building to help attract and hire the right people faster
- Ongoing support that allows you to scale up or down based on your current needs
- Measurement planning to improve data use
- Training and support during your digital transition



Do you feel the need for more digital insights? Contact us to set up a discovery meeting to better understand your challenges and how reszac can help you meet them.

Let's talk.