CMUST 2021

2021

Canadian Media Usage Study 2021

27 January 2022
French Canada- Executive Summary

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What's CMUST?

Since its inception in 2004, PHD Canada's Canadian Media Usage Study (CMUST) has been the only in-depth examination of multi-media usage sourced from the multiple research audience currencies of record.

The study documents consumers' changing media consumption across as media digital technologies increasingly impact Canadians.

This year's study updates trends on overall media usage and device penetration trends. Using new data from Vividata Metrica and Numeris VAM projects has allowed a richer understanding of the some of the mobile and smart TV habits that have been hard to quantify in recent years.

The document trends media habits through the phases of the pandemic to date – including some hints that our focused attention is dwindling rapidly.

With the rising importance of Walled Gardens in terms of consumer time and transactional considerations (i.e. data, measurement, etc…) we have, for the first time, mapped their weekly reach and time.

Given the pressing need to address climate change, we've also provided some perspective on the direct and indirect carbon footprints of the media that is bought and sold in Canada.

The last 3 years: accelerating trends
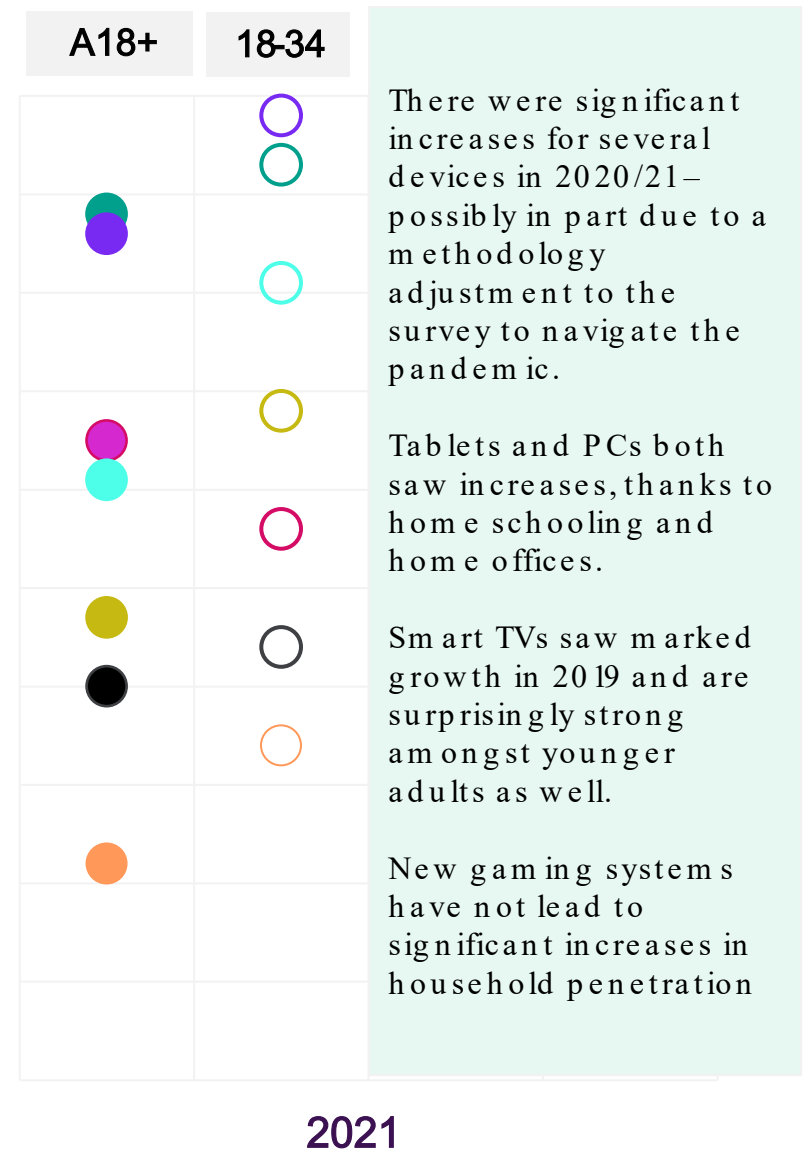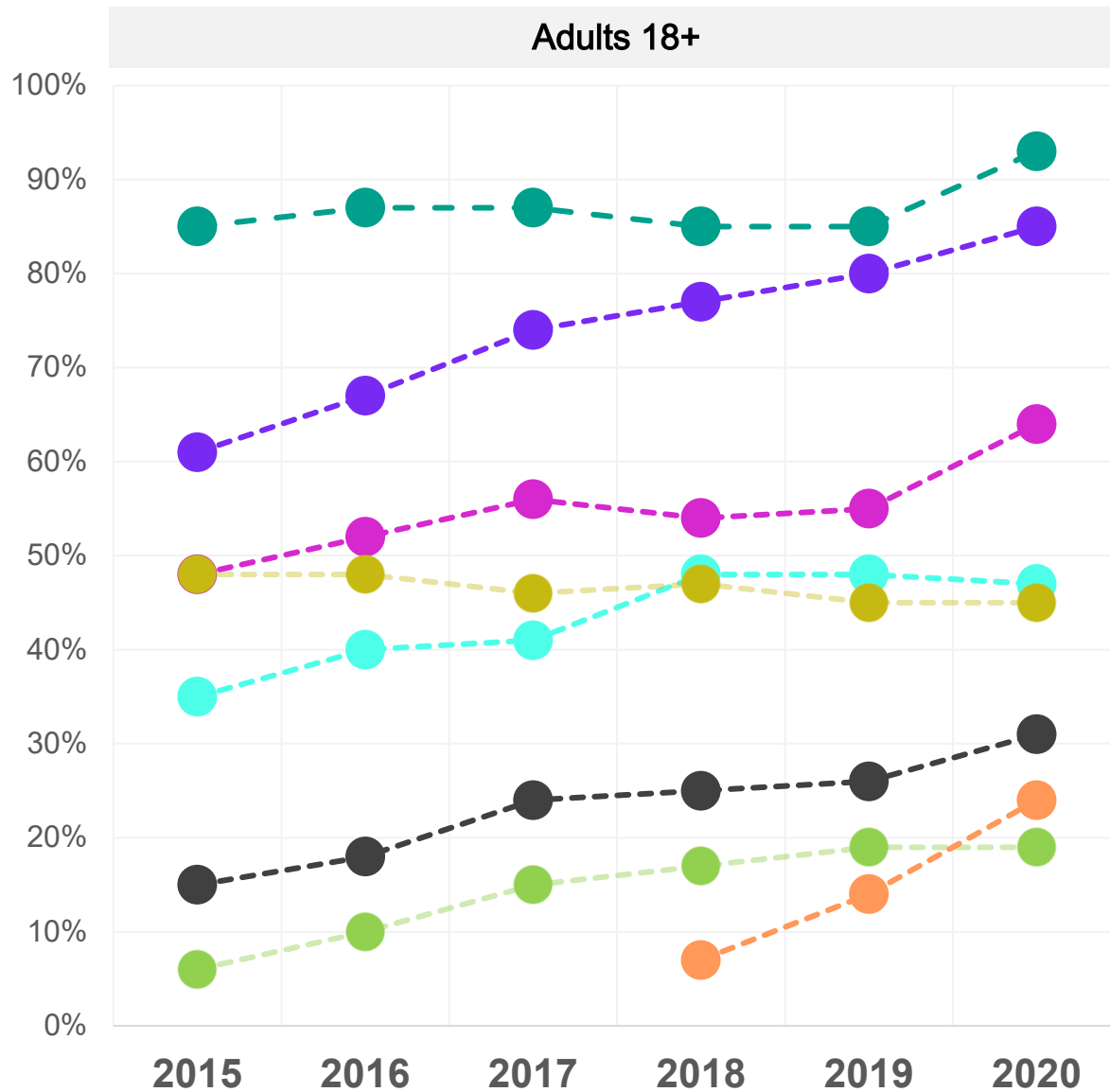
Weekly Reach (y-axis): 30%, 40%, 50%, 60%, 70%, 80%, 90%, 100%

Weekly Hours (x-axis): 0, 5, 10, 15, 20, 25, 30, 35, 40, 45, 50

Legend:
- TV
- Radio
- Newspaper
- Magazine
- Internet

A 3-year trend in weekly reach & time spent by medium (A18+) shows slight drop in TV, but significant drops in print reach and time and stabilizing numbers for radio and steady *self reported* drops in time with the Internet on mobile and desktop/laptop. New data from Numeris VAM helps us estimate time and reach of TV including linear and OTT content.

Sources: TV & Radio from Numeris PPM, Print from Vividata, Digital from Vivdiata and PHD Estimates

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Adults 18+

There were significant increases for several devices in 2020/21 – possibly in part due to a methodology adjustment to the survey to navigate the pandemic.

Tablets and PCs both saw increases, thanks to home schooling and home offices.

Smart TVs saw marked growth in 2019 and are surprisingly strong amongst younger adults as well.

New gaming systems have not lead to significant increases in household penetration

Video habits are evolving rapidly

Weekly Reach (y-axis): 0% to 100%
Weekly Hours (x-axis): 0.0 to 50.0

Data points labeled:
- TV A18-34 (~10, 87%)
- TV(A18+) (~30.5, 94%)
- SVOD 18-34 (~14, 75%)
- AVOD 18-34 (~15, 71%)
- SVOD 18+ (~8, 65%)
- AVOD 18+ (~8, 61%)
- BVOD 18-34 (~0.8, 15%)
- BVOD 18+ (~0.6, 11%)

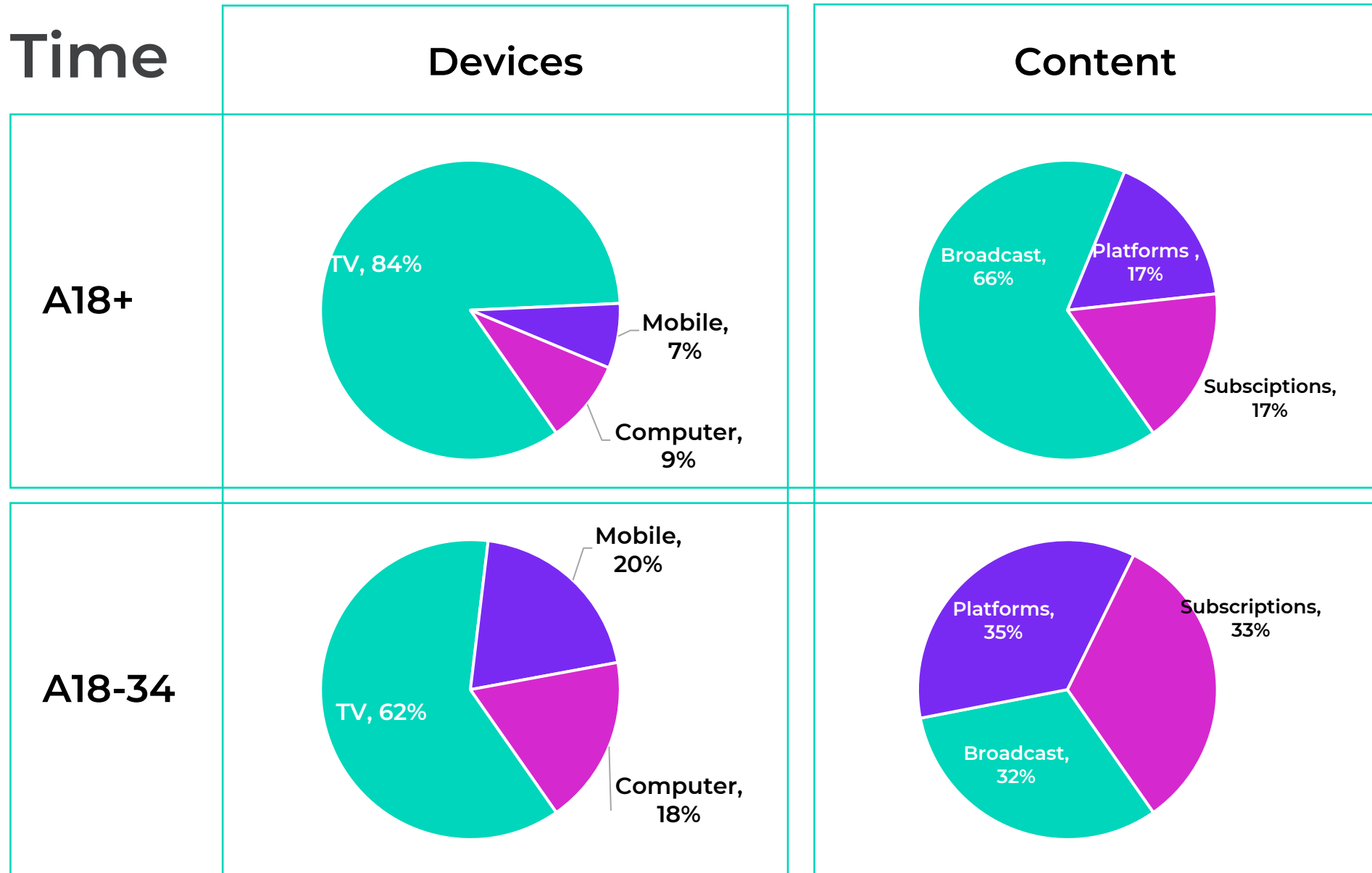| Content	
AVOD	YouTube, Twitch TV, TED, Daily motion
SVOD	Netflix, Crave, Disney PLUS, Amazon Prime Video, AppleTV Plus,
BVOD	Bell, CBC/Radio-Canada, Corus, Quebécor, Rogers, Télé-Québec, TV5
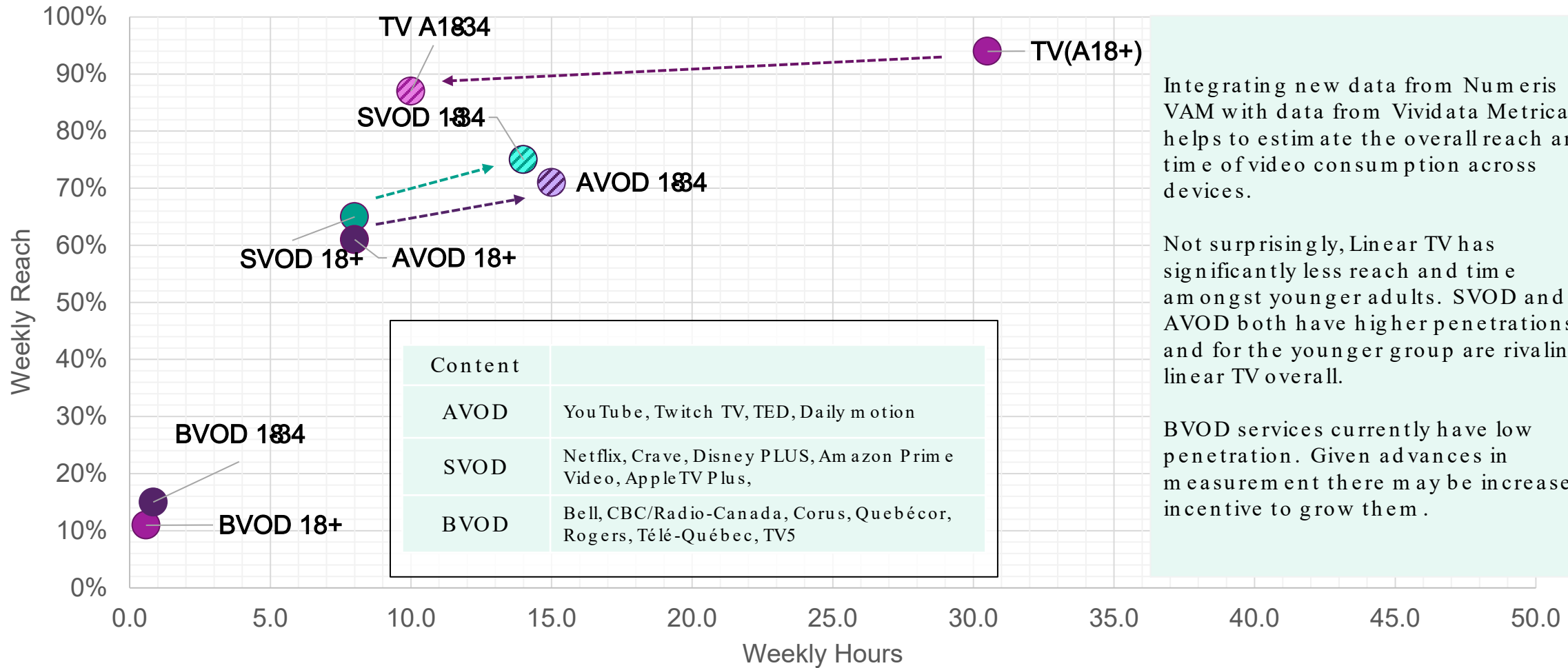
Integrating new data from Numeris VAM with data from Vividata Metrica helps to estimate the overall reach and time of video consumption across devices.

Not surprisingly, Linear TV has significantly less reach and time amongst younger adults. SVOD and AVOD both have higher penetrations and for the younger group are rivaling linear TV overall.

BVOD services currently have low penetration. Given advances in measurement there may be increased incentive to grow them.

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Source: *NumerisPPM TV, VAM, PHD estimates from multiple industry sources, Vividata Metrica*

Share of Video Time

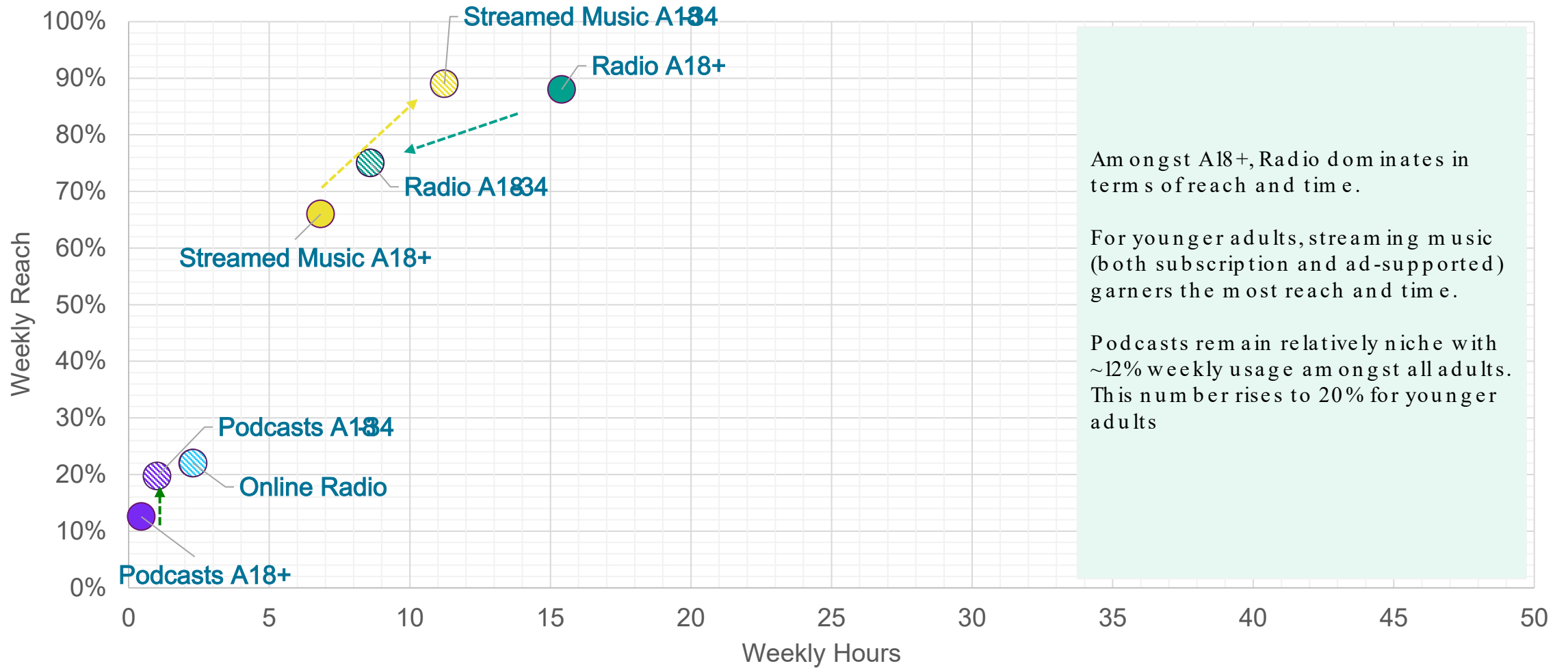|	Devices	Content
A18+	TV, 84% · Mobile, 7% · Computer, 9%	Broadcast, 66% · Platforms, 17% · Subscriptions, 17%
A18-34	TV, 62% · Mobile, 20% · Computer, 18%	Platforms, 35% · Subscriptions, 33% · Broadcast, 32%

TV remains the first device for video viewing amongst Adults 18+ and younger adults. A18-34 TV erosion towards smaller screens is increasing.

The sources of content, however, vary dramatically. Broadcast TV dominates amongst A18+ (given it's strong performance particularly amongst A55+).
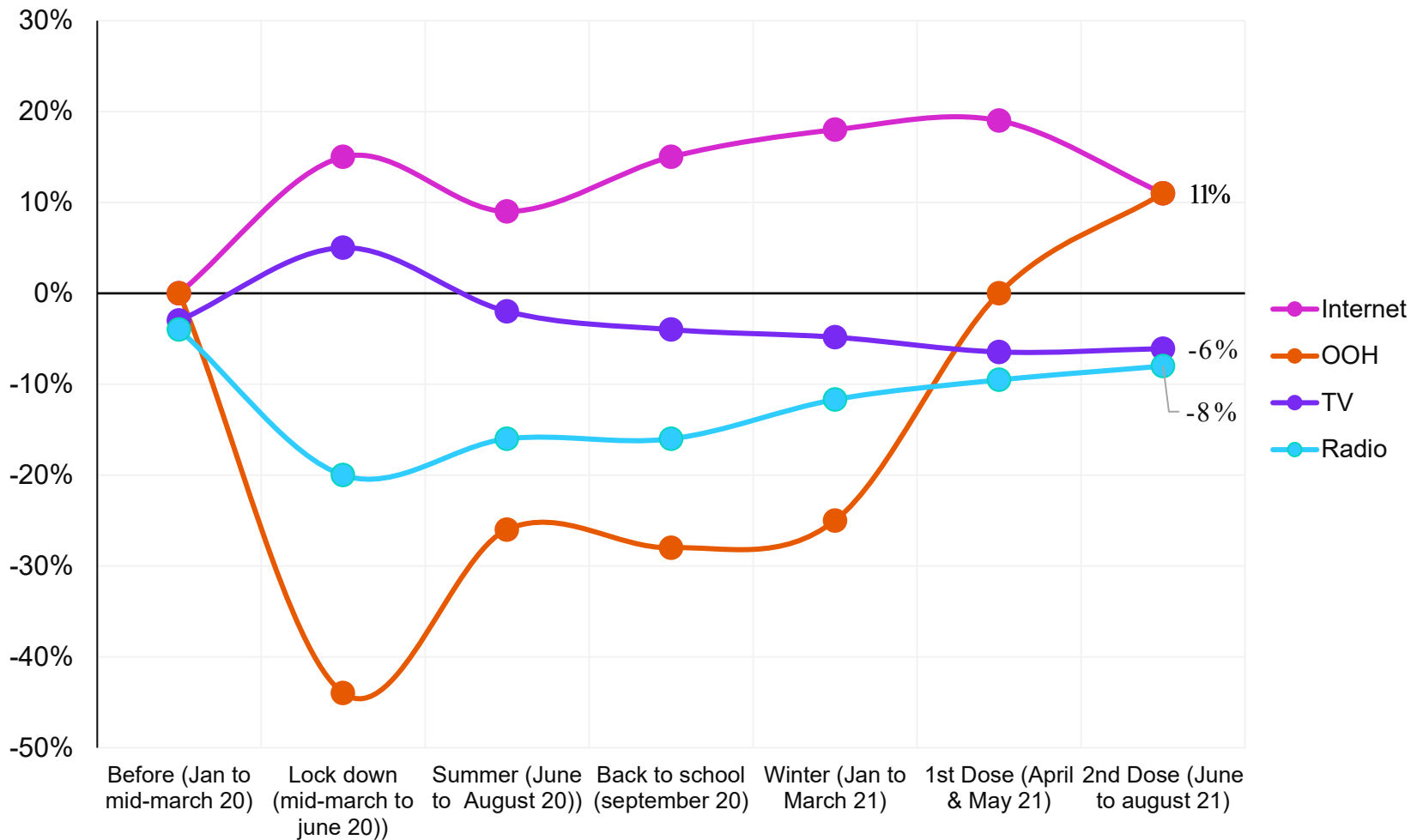
Platforms (AVOD) and Subscriptions (SVOD) dominate for younger adults.

Source: *NumerisPPM TV, VAM, PHD estimates from multiple industry sources Vividata Metrica*

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Streamed Music A18-34

Radio A18+

Radio A18-34

Streamed Music A18+

Podcasts A18-34

Online Radio

Podcasts A18+

Weekly Reach (y-axis): 0% to 100%

Weekly Hours (x-axis): 0 to 50

Amongst A18+, Radio dominates in terms of reach and time.

For younger adults, streaming music (both subscription and ad-supported) garners the most reach and time.

Podcasts remain relatively niche with ~12% weekly usage amongst all adults. This number rises to 20% for younger adults

Source: *NumerisPPM Radio, MTM Spring 2021, PHD estimates from multiple industry sources, Canadian Podcast Listener*

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The COVID Effect

Chart showing media consumption changes relative to Q1 2020 across pandemic phases, with lines for Internet, OOH, TV, and Radio. Final values labeled: Internet 11%, TV -6%, Radio -8%.

X-axis categories:
- Before (Jan to mid-march 20)
- Lock down (mid-march to june 20))
- Summer (June to August 20))
- Back to school (september 20)
- Winter (Jan to March 21)
- 1st Dose (April & May 21)
- 2nd Dose (June to august 21)

Legend: Internet, OOH, TV, Radio

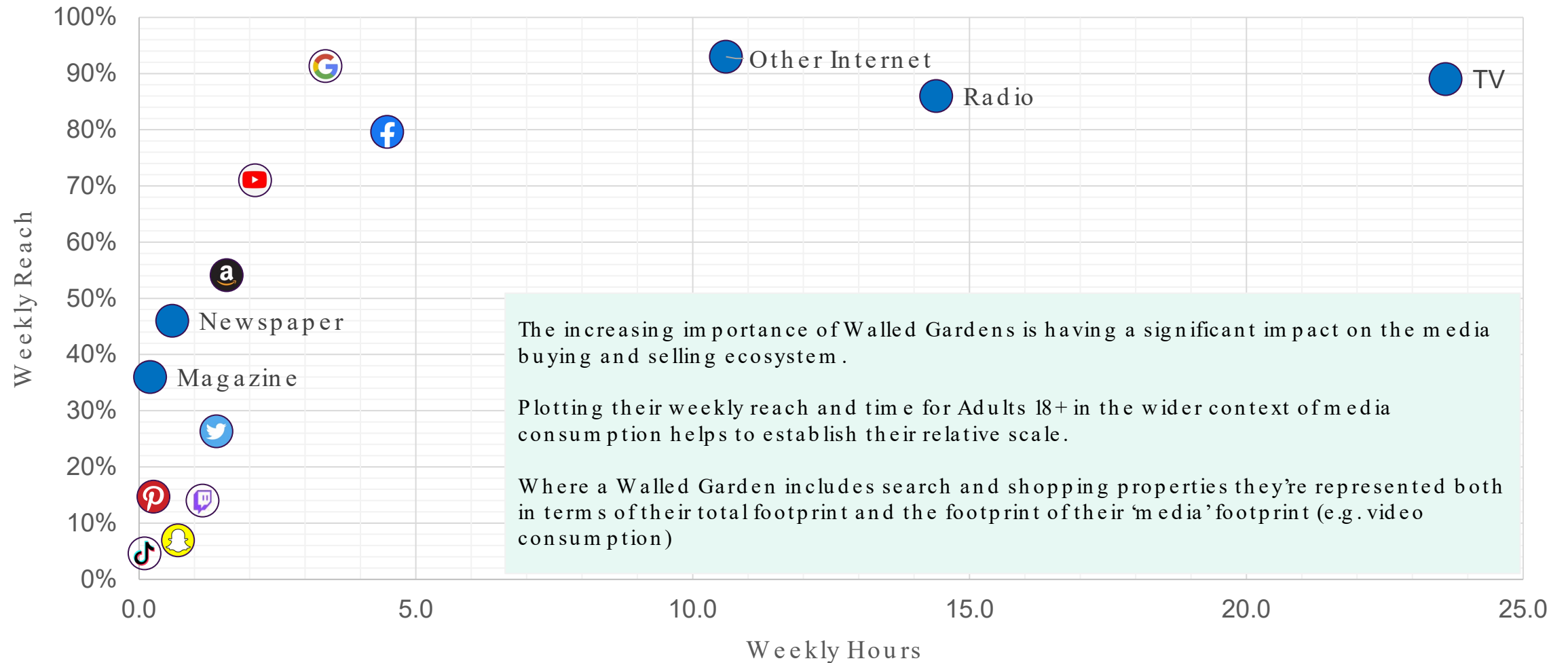The Pandemic has had a significant impact on media habits.

Relative to Q1 2020 only the internet has seen sustained increases in time spent.

After a short term lift, TV has seen slow-but-steady declines.

Media consumed partially or wholly out of home (e.g. radio and OOH) have seen dramatical drops. Summer 2021 saw OOH return to (non-seasonally adjusted) increases relative to pre-Pandemic.
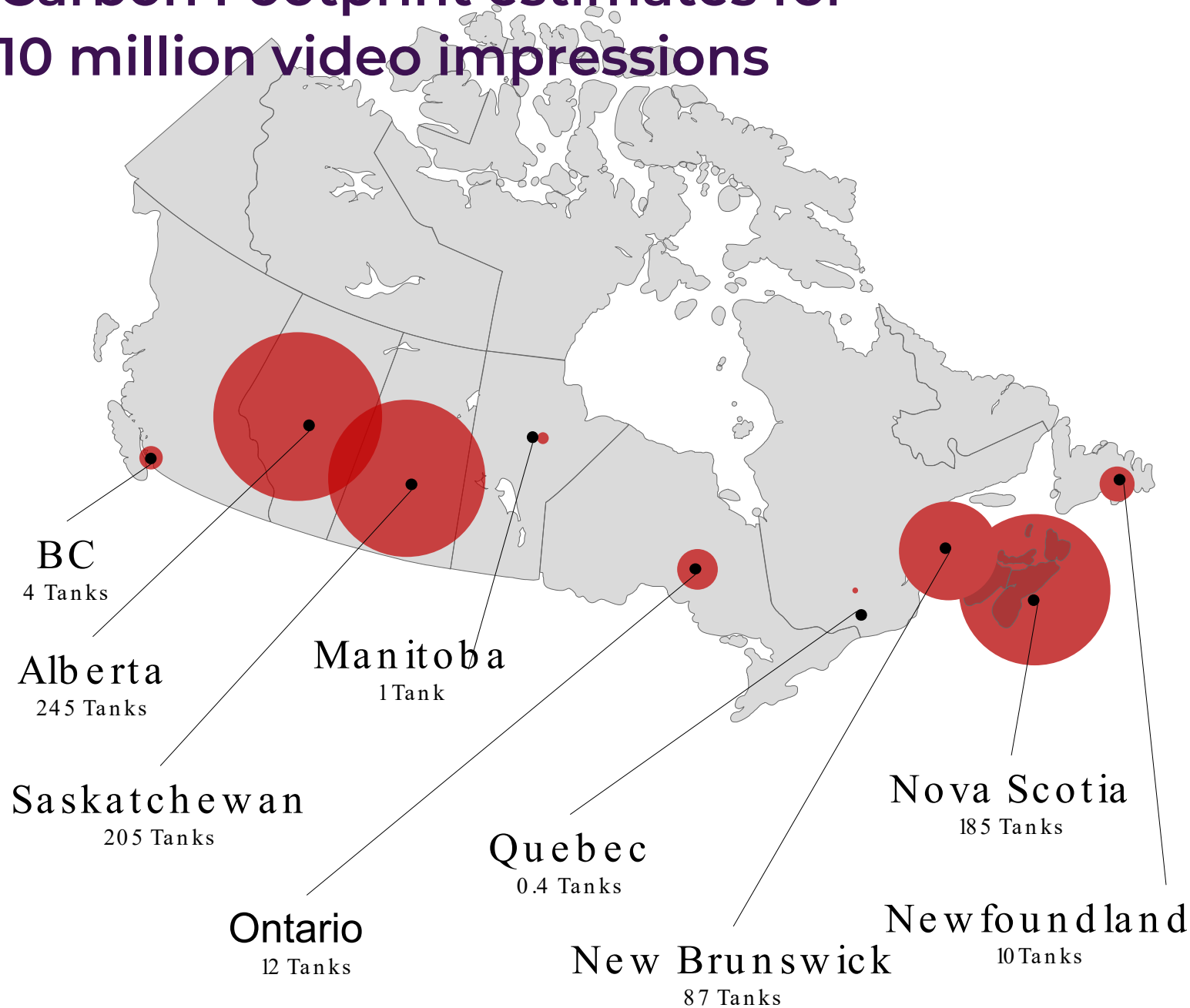
Internet Attention Index tracks an estimate of time spent relative to sites visited and suggests a steady decline in attention online (in spite of higher time spent and more sites visited)

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Walled Gardens in Context

The increasing importance of Walled Gardens is having a significant impact on the media buying and selling ecosystem.

Plotting their weekly reach and time for Adults 18+ in the wider context of media consumption helps to establish their relative scale.

Where a Walled Garden includes search and shopping properties they're represented both in terms of their total footprint and the footprint of their 'media' footprint (e.g. video consumption)

Source: Vividata Metrica Summer 2021, A18+

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Carbon Footprint estimates for 10 million video impressions

BC
4 Tanks

Alberta
245 Tanks

Saskatchewan
205 Tanks

Manitoba
1 Tank

Ontario
12 Tanks

Quebec
0.4 Tanks

New Brunswick
87 Tanks

Nova Scotia
185 Tanks

Newfoundland
10 Tanks

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Using a combination of sources, we've sought to contextualize the carbon footprint of 10 million video impressions in terms 'tanks of gas'.

The map highlights the large variation across provinces as a result of the relative carbon intensity of electrical grids.

The carbon impact of digital advertising can be reduced with – smaller file sizes, increased 'off peak' impressions and weighting delivery towards low carbon geographies like Quebec.

It's important to note that advertising is a key driver of consumer demand – with a much greater impact on carbon emissions than bandwidth alone. A recent study suggested that 28% of consumer emissions of UK residents were from advertising-generated demand.

The biggest gains for the climate cause are likely to come from brilliant advertising that creates consumer demand for green products.

If you'd like to learn more about the topic and the calculations the following sources may be useful - Electricity usage of internet bandwidth, provincial differences and estimated equivalences.

Sources

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Device penetration	MTM Fall 2020/ Spring 2021 unless indicated otherwise as PHD estimated.
TV weekly time/reach, 2020	Numeris, Fall'20/Spring'21 PPM averaged.
Radio weekly time/reach , 2020	Numeris, Fall'20, Diary
Internet weekly time/reach , 2020	Vividata Spring 2021
Magazine weekly time/reach , 2020	Vividata Spring 2021, generic question.
Newspaper weekly time/reach , 2020	Vividata Spring 2021, 72 daily rollup.
TV (Linear+OTT), weekly time/reach, 2020	Numeris Fall'20/Spring'21, Numeris Vam September , Vividata Metrica, PHD estimates
Online audio weekly time/reach	Numeris PPM Fall 2020
Podcast weekly time/reach and tuning dynamics	The Canadian Podcast Listener, Audience Insights Inc., Ulster Media. MTM Fall 2020/Spring 2021, reduced by PHD estimate of respondent over claim.
Streamed music weekly time/reach	MTM Fall2020/Spring 2021, Vividata Metrica, PHD estimates, Numeris PPM
Video Reach/Time	Numeris PPM TV, VAM, PHD estimates from multiple industry sources, Vividata Metrica
Share of Video Time	Compiled from sources used throughout document
Momentum	Think TV compilation from multiple sources, IAB Canada Revenue Report, PHD estimates
Share of Ad Spend	Statistics Canada Table 20-10-0065-01 Retail trade, total sales and e-commerce sales
eCommerce sales	Time spent as summarized in CMUST 2020