CMUST 2022

Canadian Media Usage Study
Total 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.
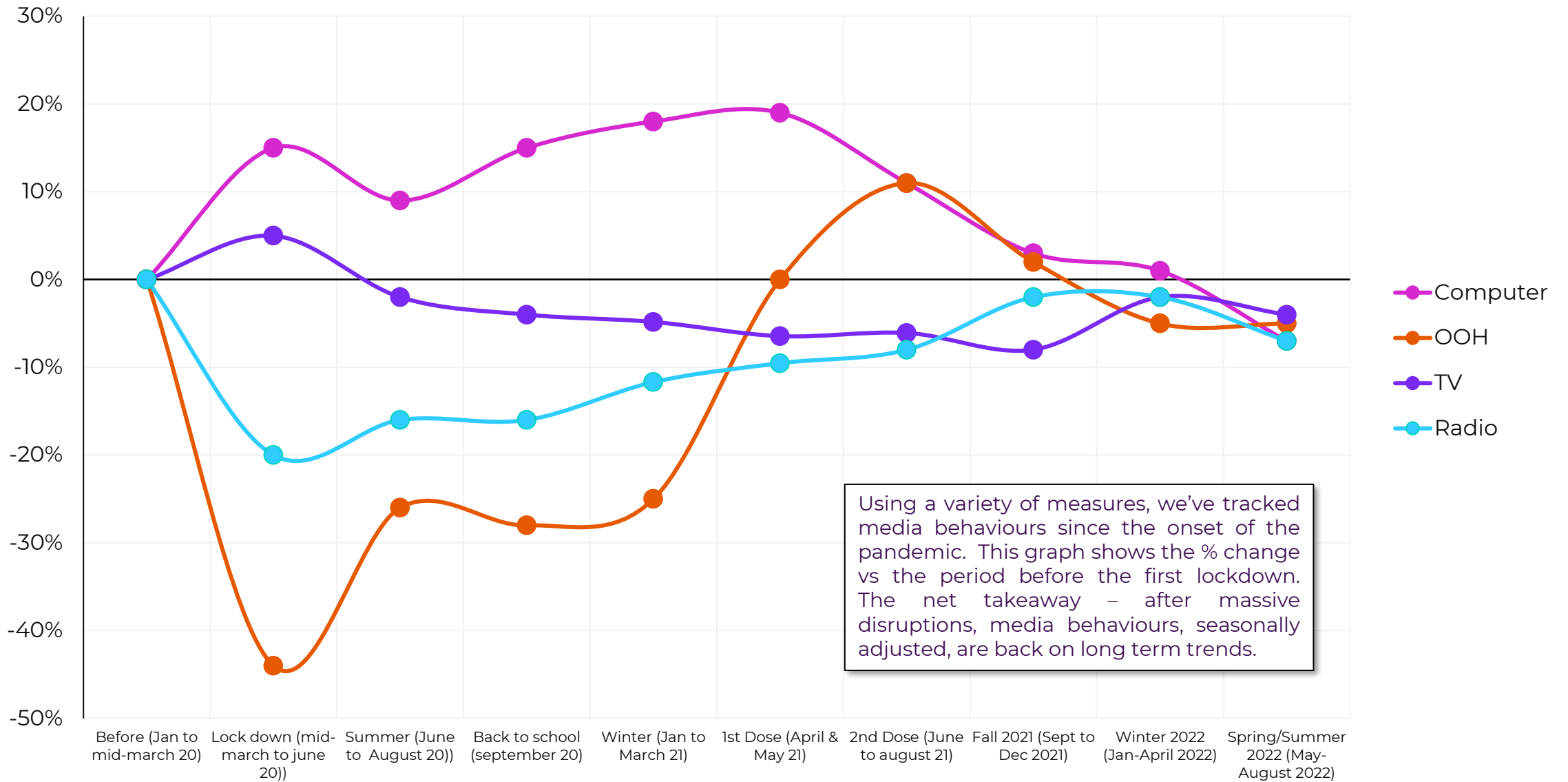
The study documents consumers' changing media consumption as digital technologies increasingly impact Canadians' habits.

Digital media, consumed on desktop and mobile, is now very much mainstream. To better understand adoption across the general population we've looked at how behaviours vary across three age cohorts. We've also considered time with digital across other devices.

As the disruption from Covid subsides we've also looked at how media habits are stabilizing.
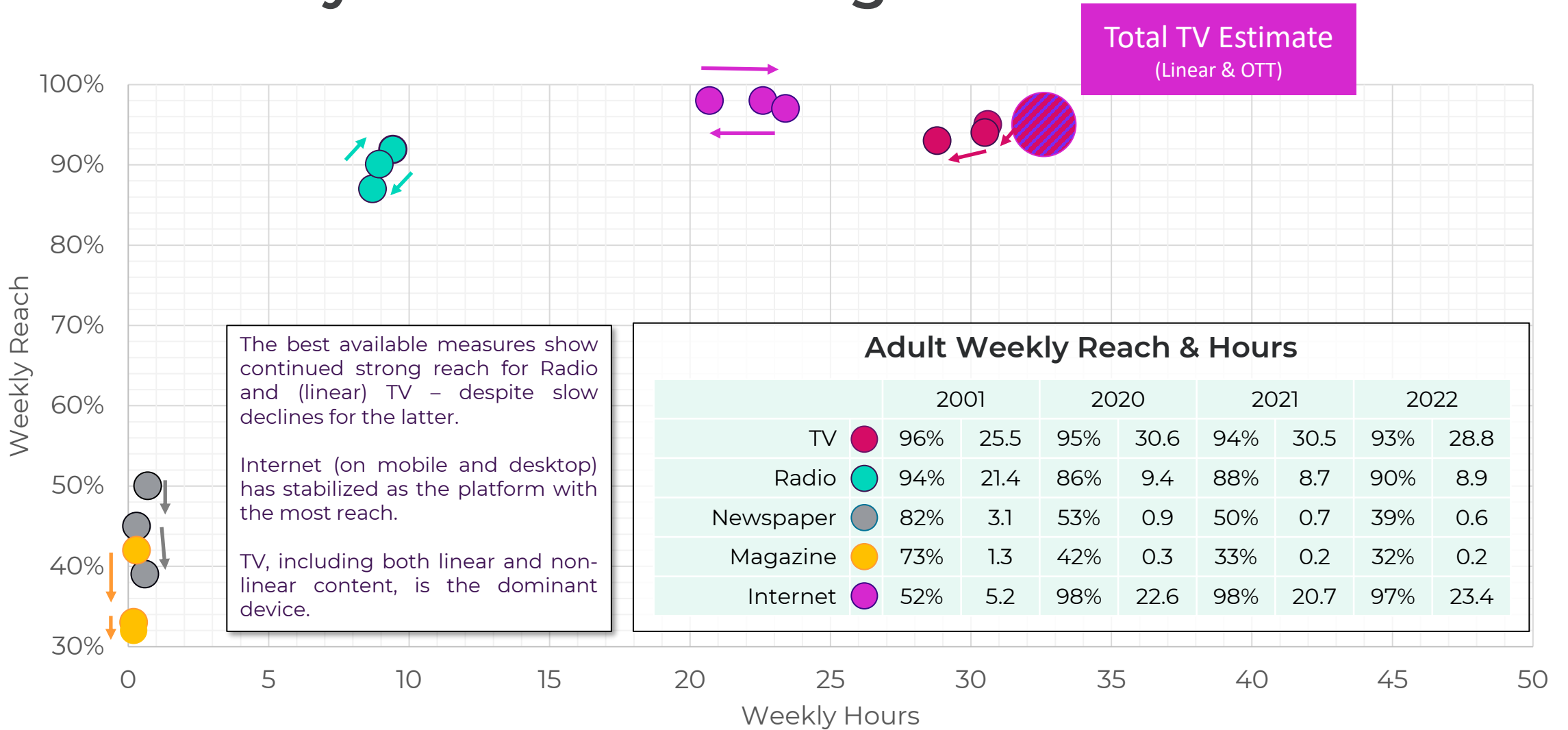
Digital commerce is an increasingly important part of our economy. It's also a significant driver in shifting ad spends. We have, as a result, dug into digital commerce habits across our cohorts and over time through Covid.

As we pulled together this year's edition, one of the biggest developments was the impending rollout of Netflix's ad-funded option. Will this be a big deal? Will it catalyze development in Connected TV advertising? It's too early to tell, but some primary research carried out with Vividata shows significant promise for advertisers.

Using a variety of measures, we've tracked media behaviours since the onset of the pandemic. This graph shows the % change vs the period before the first lockdown. The net takeaway – after massive disruptions, media behaviours, seasonally adjusted, are back on long term trends.

Sources: Numeris PPM TV & Radio AvHrsWk (Cap); OOH Pattison Outdoor Furthest range of movement (KM); Internet SimilarWeb visits per day & PHD Estimates from multiple sources
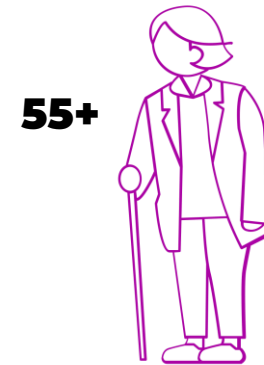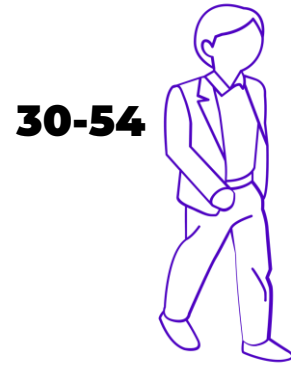
The last 3 years: accelerating trends

Total TV Estimate (Linear & OTT)

The best available measures show continued strong reach for Radio and (linear) TV – despite slow declines for the latter.

Internet (on mobile and desktop) has stabilized as the platform with the most reach.

TV, including both linear and non-linear content, is the dominant device.

Adult Weekly Reach & Hours

		2001		2020		2021		2022	
TV		96%	25.5	95%	30.6	94%	30.5	93%	28.8
Radio		94%	21.4	86%	9.4	88%	8.7	90%	8.9
Newspaper		82%	3.1	53%	0.9	50%	0.7	39%	0.6
Magazine		73%	1.3	42%	0.3	33%	0.2	32%	0.2
Internet		52%	5.2	98%	22.6	98%	20.7	97%	23.4

Weekly Reach (y-axis)

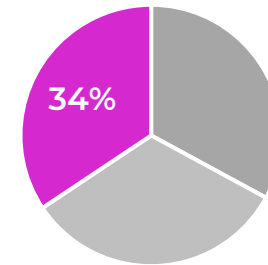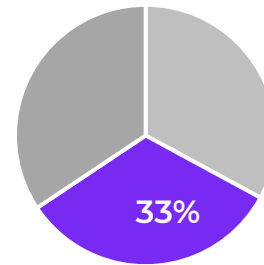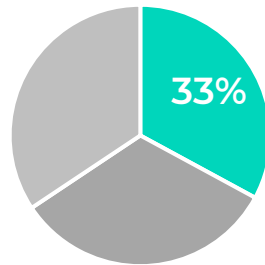Weekly Hours (x-axis)

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Quebec's population has evolved dramatically in recent decades.

The absolute number of <30s has stayed relatively constant while the other two age groups represented have seen sustained growth.
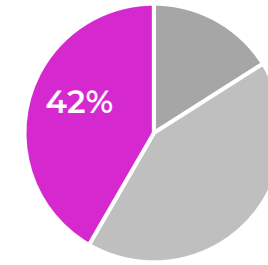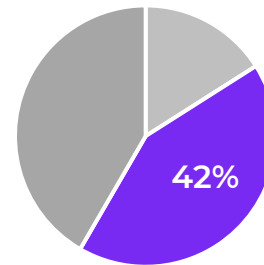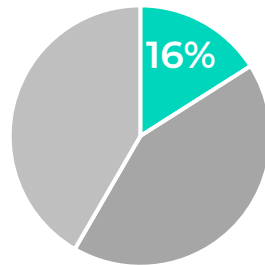
In 2022, for the first time, these cohorts were roughly the same size.

Under 30

30-54

55+

Share of Population

33%

33%

34%

Share of Household Spend

16%

42%

42%

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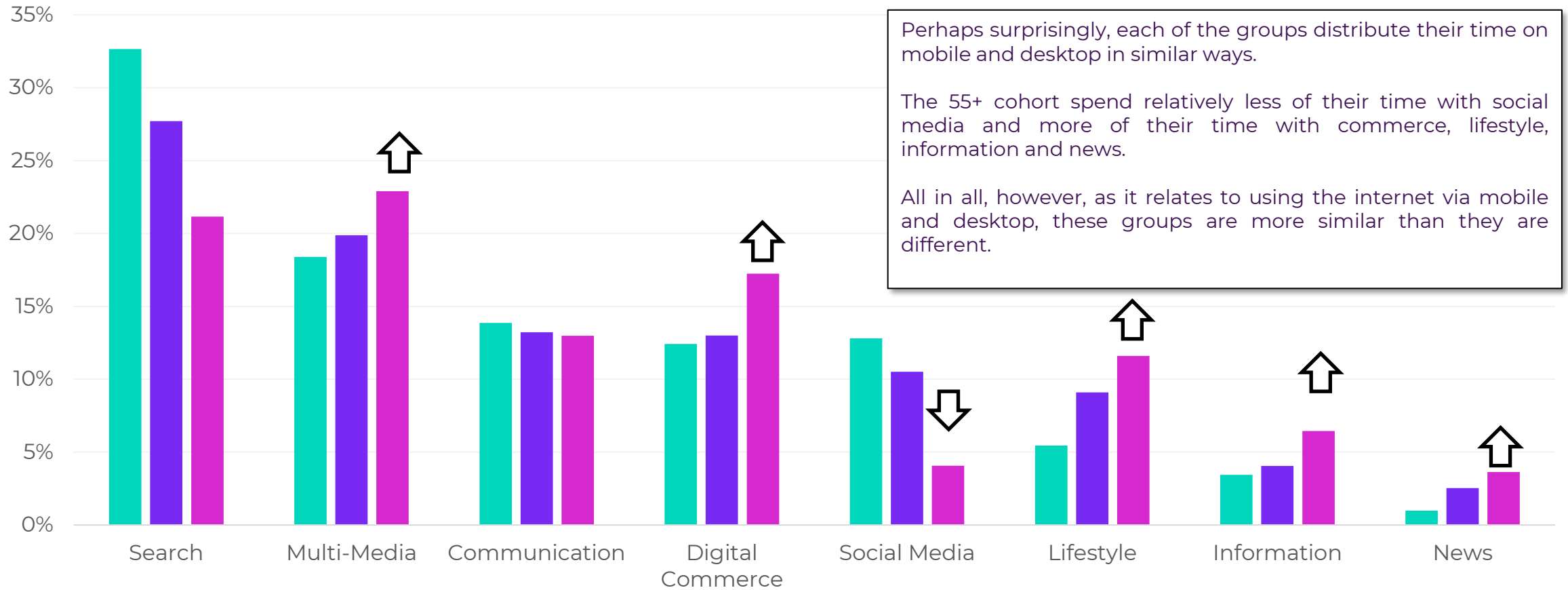
How the Cohorts Spend their Computer & Mobile Time

Under 30   **30-54**   **55+**

Perhaps surprisingly, each of the groups distribute their time on mobile and desktop in similar ways.

The 55+ cohort spend relatively less of their time with social media and more of their time with commerce, lifestyle, information and news.

All in all, however, as it relates to using the internet via mobile and desktop, these groups are more similar than they are different.

Search | Multi-Media | Communication | Digital Commerce | Social Media | Lifestyle | Information | News

Source: *Vividata Metrica, French Canada*

Digital Commerce Spends

Amount Spent Online Last Month

30-54 — **$222** avg
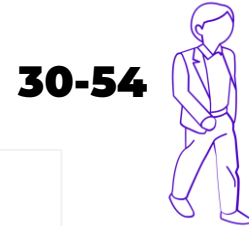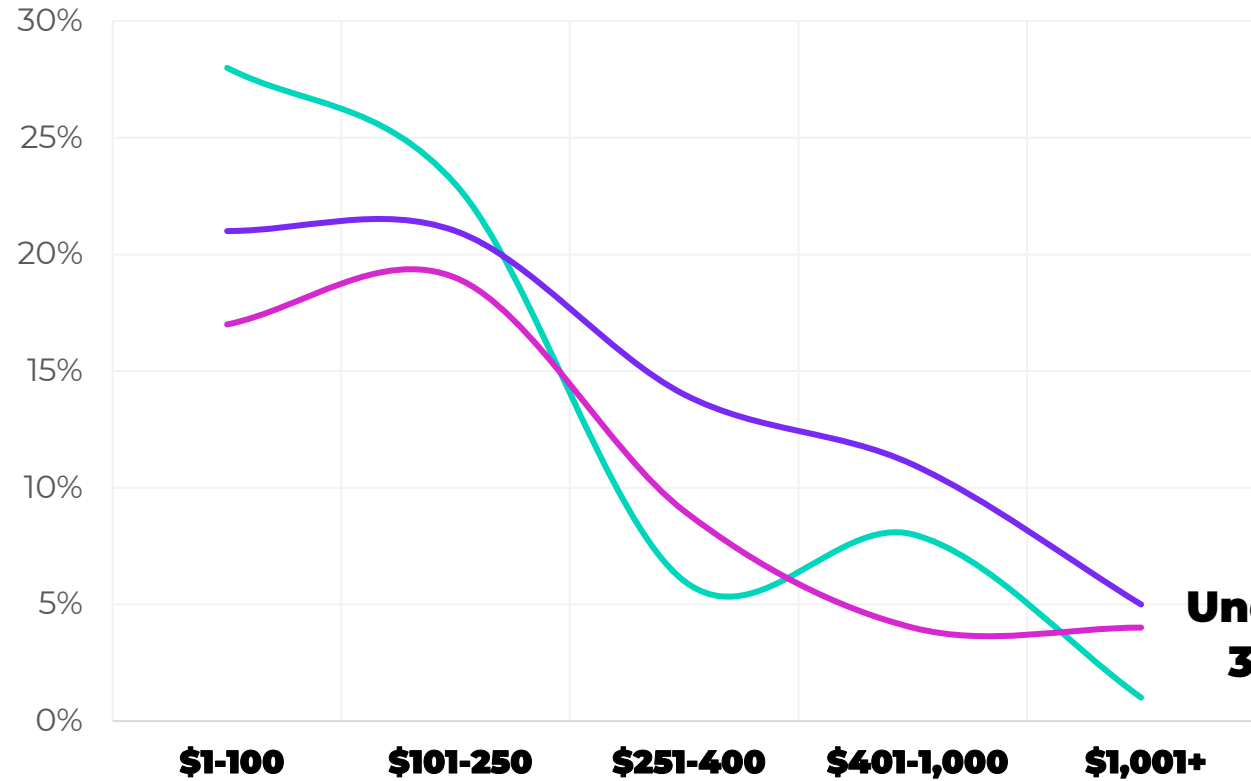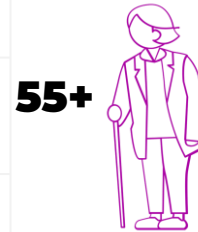
55+ — **$148** avg
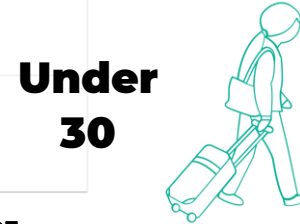
Under 30 — **$140** avg

The 30-54 cohort spend the most, on average, on digital commerce.

They were followed by the 55+ group. Given both groups spend similar amounts overall, this shows a slower adoption of Digital Commerce amongst the 55+ group.

The youngest groups, probably as a function of their lower expenditure, spend the least on average but are closing the gap with 55+ group.
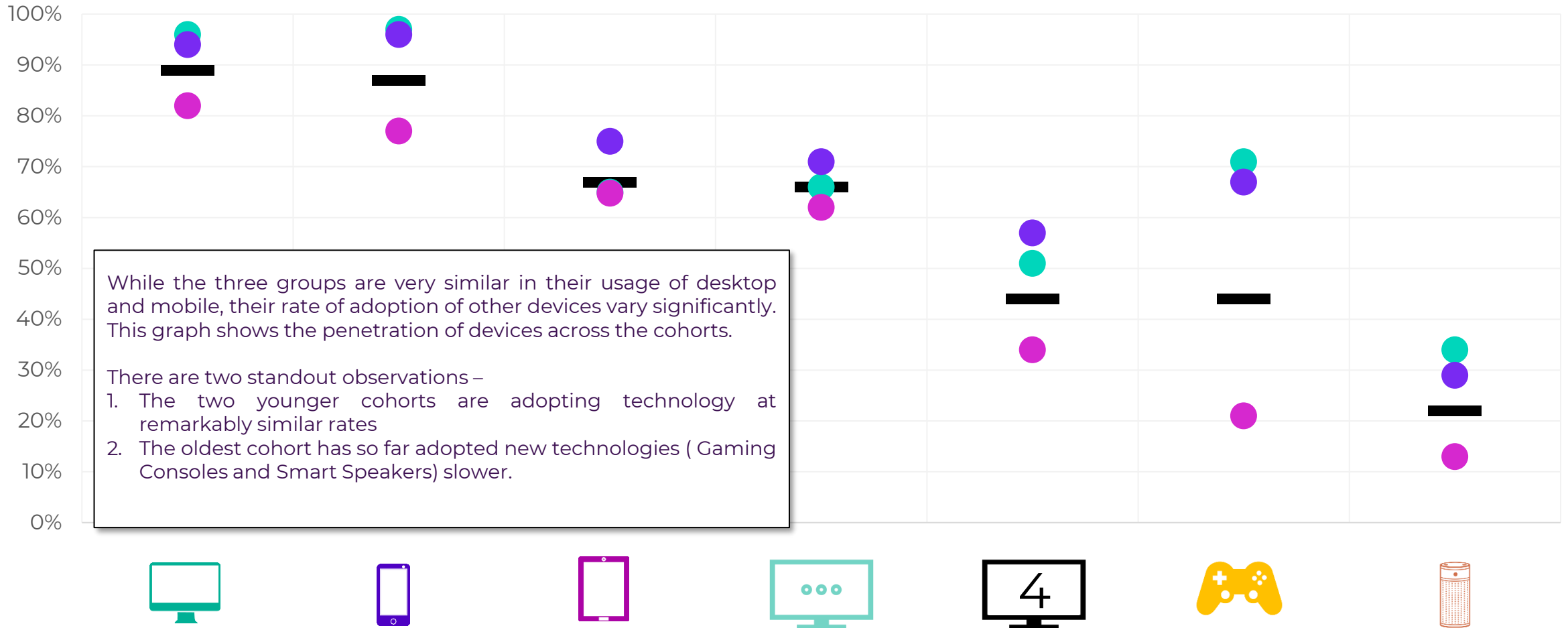
Chart x-axis: $1-100 | $101-250 | $251-400 | $401-1,000 | $1,001+

Chart y-axis: 0% | 5% | 10% | 15% | 20% | 25% | 30%

Source: Vividata Spring 2022, French Canada

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Under 30

30-54

55+

100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%

While the three groups are very similar in their usage of desktop and mobile, their rate of adoption of other devices vary significantly. This graph shows the penetration of devices across the cohorts.

There are two standout observations –
1. The two younger cohorts are adopting technology at remarkably similar rates
2. The oldest cohort has so far adopted new technologies (Gaming Consoles and Smart Speakers) slower.
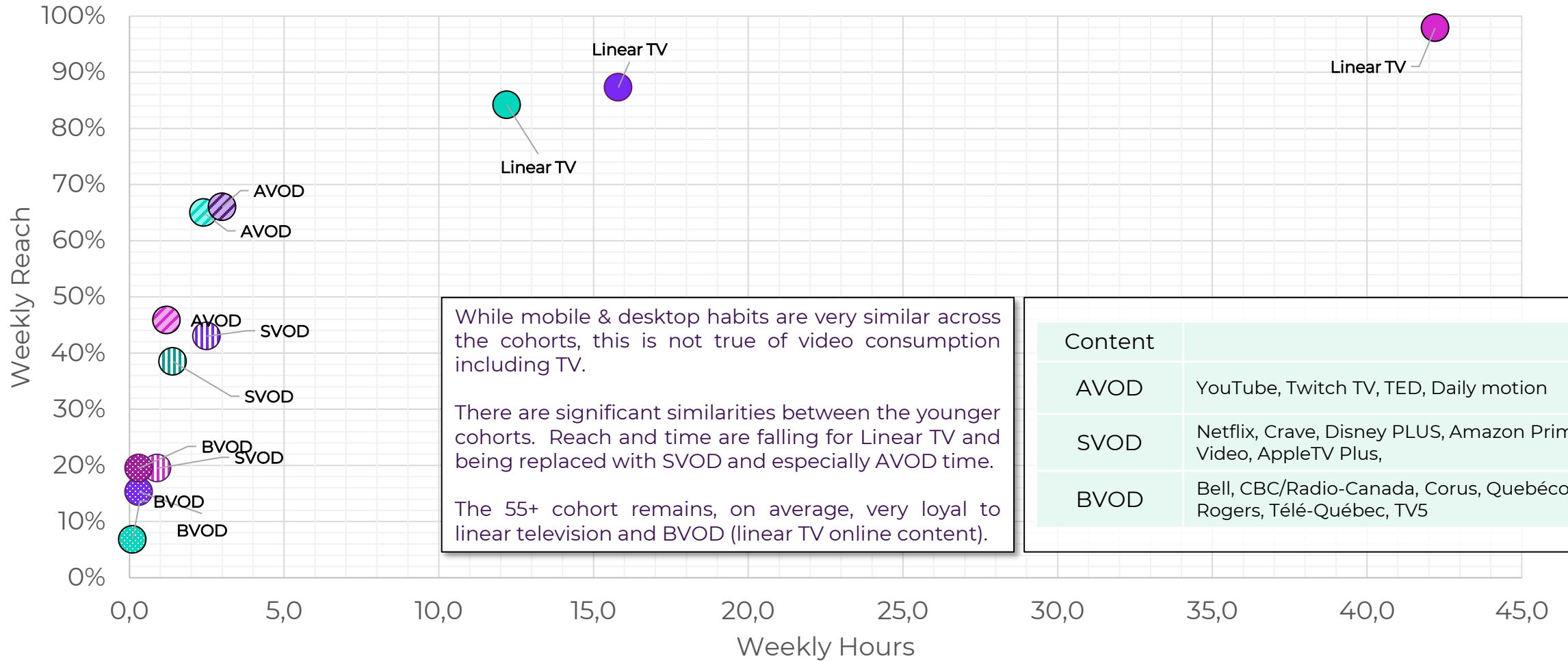
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Video habits are evolving rapidly

Under 30

30-54

55+

Weekly Reach (y-axis): 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90%, 100%

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

Linear TV
Linear TV
Linear TV
AVOD
AVOD
AVOD
SVOD
SVOD
BVOD
SVOD
BVOD
BVOD

While mobile & desktop habits are very similar across the cohorts, this is not true of video consumption including TV.

There are significant similarities between the younger cohorts. Reach and time are falling for Linear TV and being replaced with SVOD and especially AVOD time.

The 55+ cohort remains, on average, very loyal to linear television and BVOD (linear TV online content).

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

Under 30

30-54

55+

Weekly Reach

100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%

Radio
Radio
Streamed Music
Radio
Podcasts
Streamed Music
Podcasts
Online Radio
Online Radio
Streamed Music
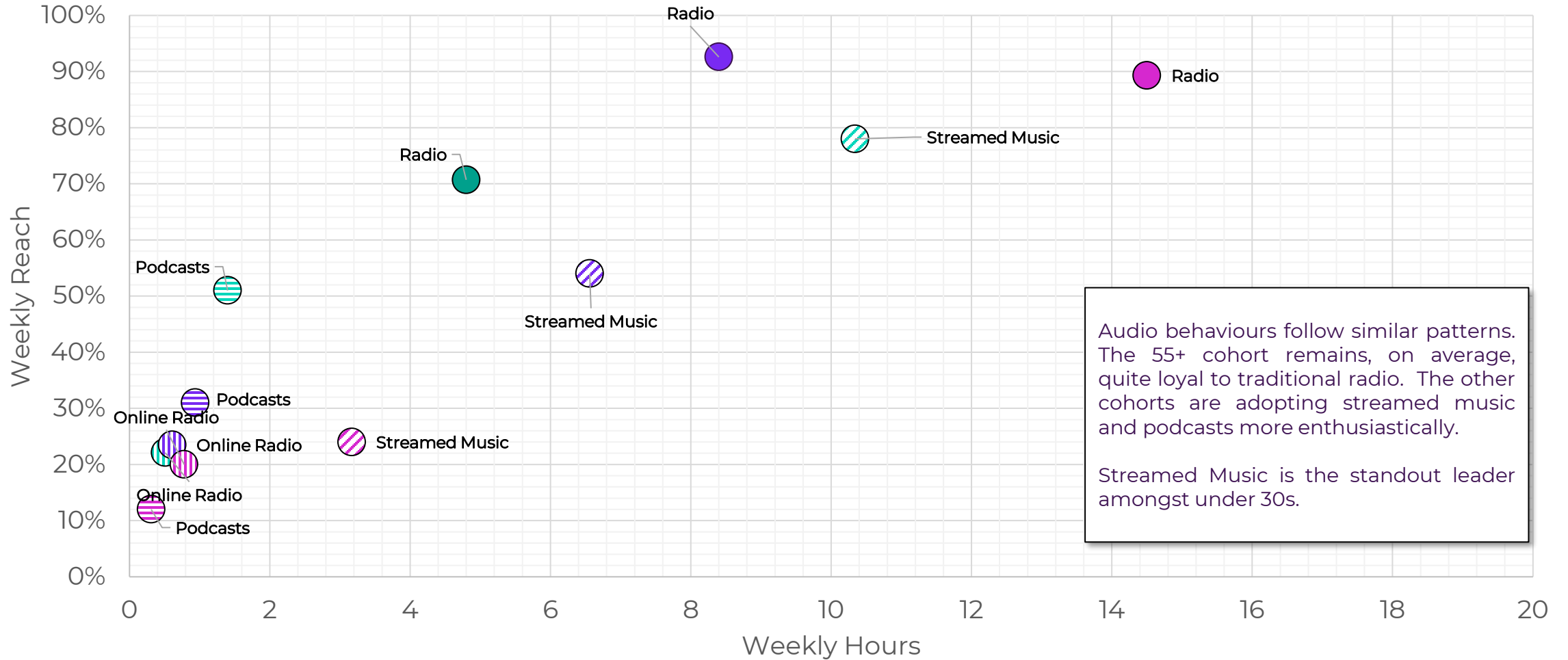Online Radio
Podcasts

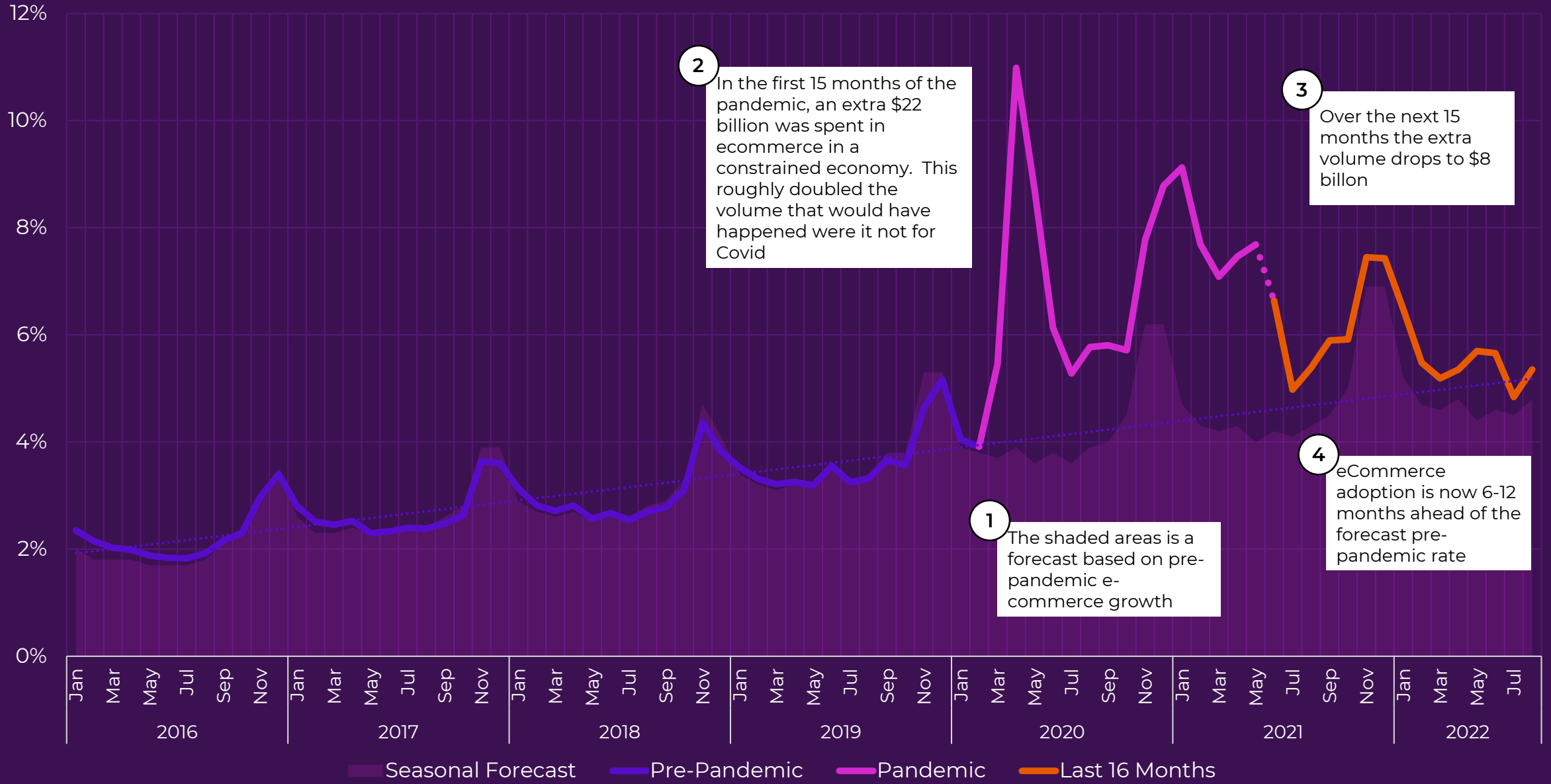0   2   4   6   8   10   12   14   16   18   20

Weekly Hours

Audio behaviours follow similar patterns. The 55+ cohort remains, on average, quite loyal to traditional radio. The other cohorts are adopting streamed music and podcasts more enthusiastically.

Streamed Music is the standout leader amongst under 30s.

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Share of Retail Sales Occurring Online

2 In the first 15 months of the pandemic, an extra $22 billion was spent in ecommerce in a constrained economy. This roughly doubled the volume that would have happened were it not for Covid

3 Over the next 15 months the extra volume drops to $8 billon

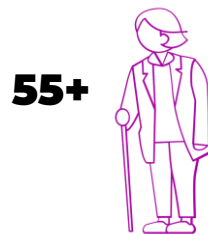**1** The shaded areas is a forecast based on pre-pandemic e-commerce growth

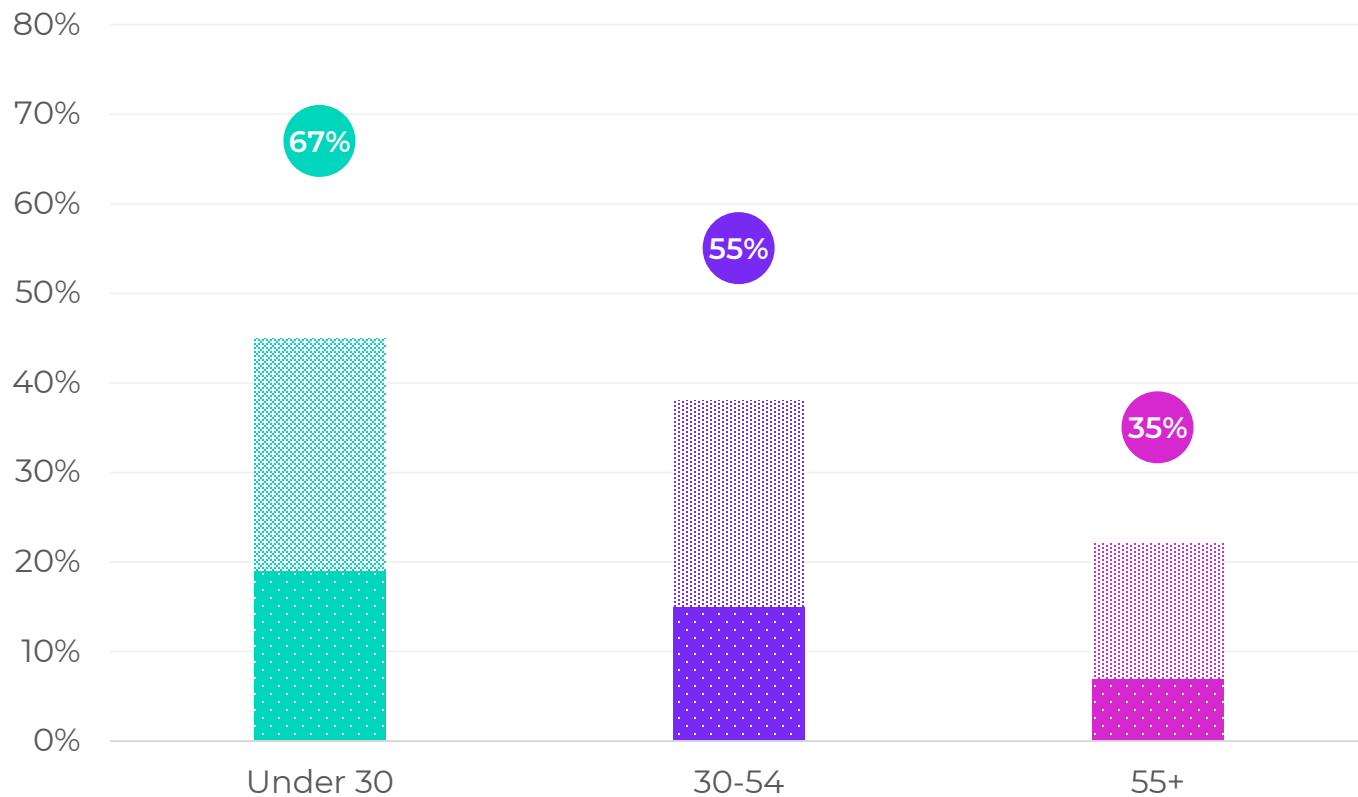**4** eCommerce adoption is now 6-12 months ahead of the forecast pre-pandemic rate

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Legend: Seasonal Forecast — Pre-Pandemic — Pandemic — Last 16 Months

Under 30

30-54

55+

An October 2022 survey suggests significant openness to an ad-funded tier of Netflix.

Because the platform skews towards the younger cohorts it seems quite likely to that it will attract a population that is increasingly hard to reach in linear television.

● **Subscribe to Netflix**

How likely are you to subscribe to a TV/video streaming service with advertising if it saves you $5 a month?
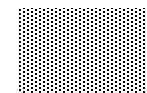
Somewhat Likely

Very Likely

67%

55%

35%

80%
70%
60%
50%
40%
30%
20%
10%
0%

Under 30   30-54   55+

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Source: Vividata's + PHD Video Streaming Service Study, Canada 18+, n=1811, October 2022

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Sources

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

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