

A person in a winter coat stands on a rocky outcrop, looking out at a vast, starry night sky. The scene is illuminated by a soft, ethereal light, possibly from a nebula or aurora, creating a dreamlike atmosphere. The overall color palette is dominated by deep blues, purples, and greens.

CMUST

2021

Canadian Media Usage Study 2021

30 November 2021

phd



A Marketing



A woman with glasses is sitting at a desk, smiling as she works on a laptop. The scene is dimly lit, with a lamp providing light. The background shows a window with blinds.

The Industry Perspective

A family is in a kitchen. A man is standing at the counter holding a plate. A young child is leaning over the counter. Another child is sitting on the floor in front of the counter, playing with toys. The scene is brightly lit.

The 'Consumer' Perspective

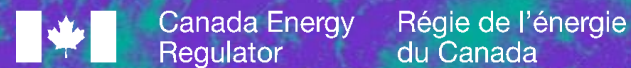
A close-up photograph of a person's hands writing in a notebook on a wooden table. A white coffee cup is visible on the left. The image is overlaid with a semi-transparent blue gradient.

**Where we've
been**

A photograph of a person's hands holding a smartphone. The person is wearing a blue sweater. The background is a blurred office setting. The image is overlaid with a semi-transparent blue gradient.

**Where
we're heading** ⁵

Data



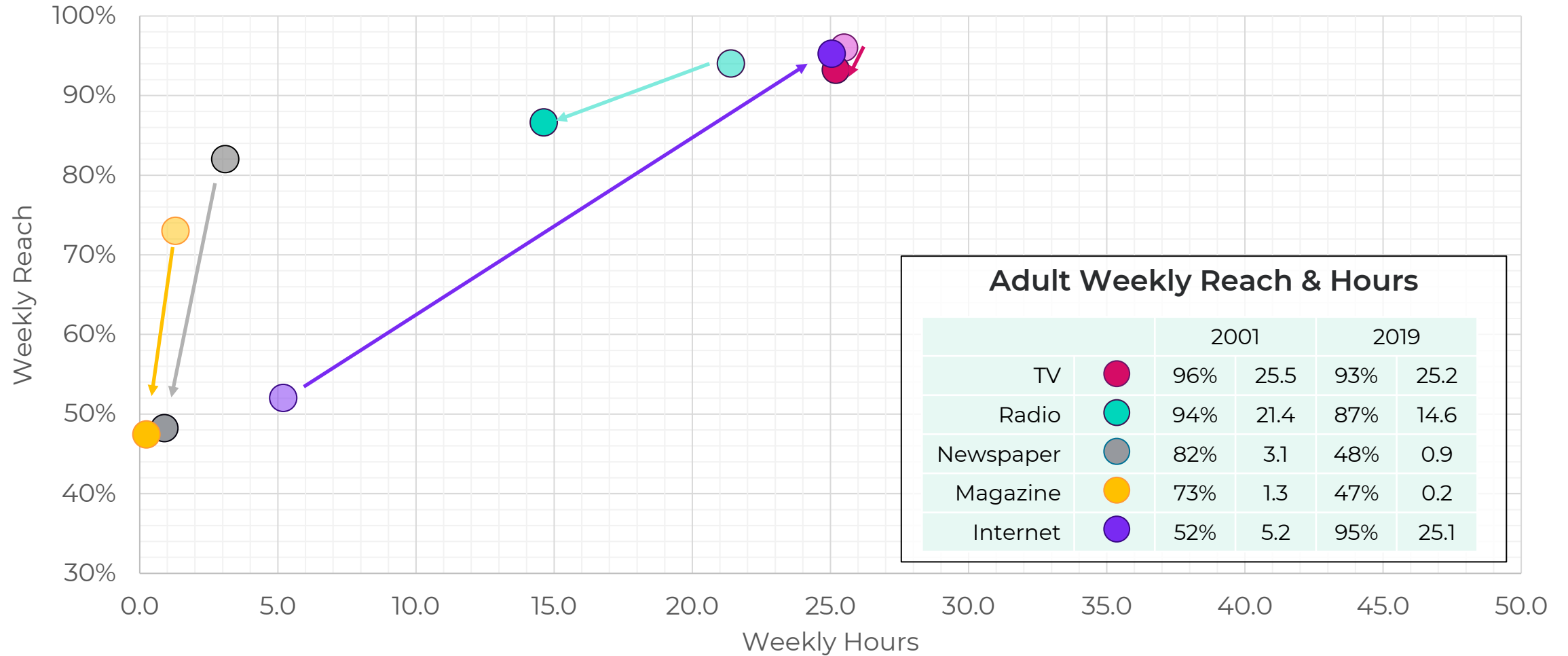


The 'Consumer' Perspective

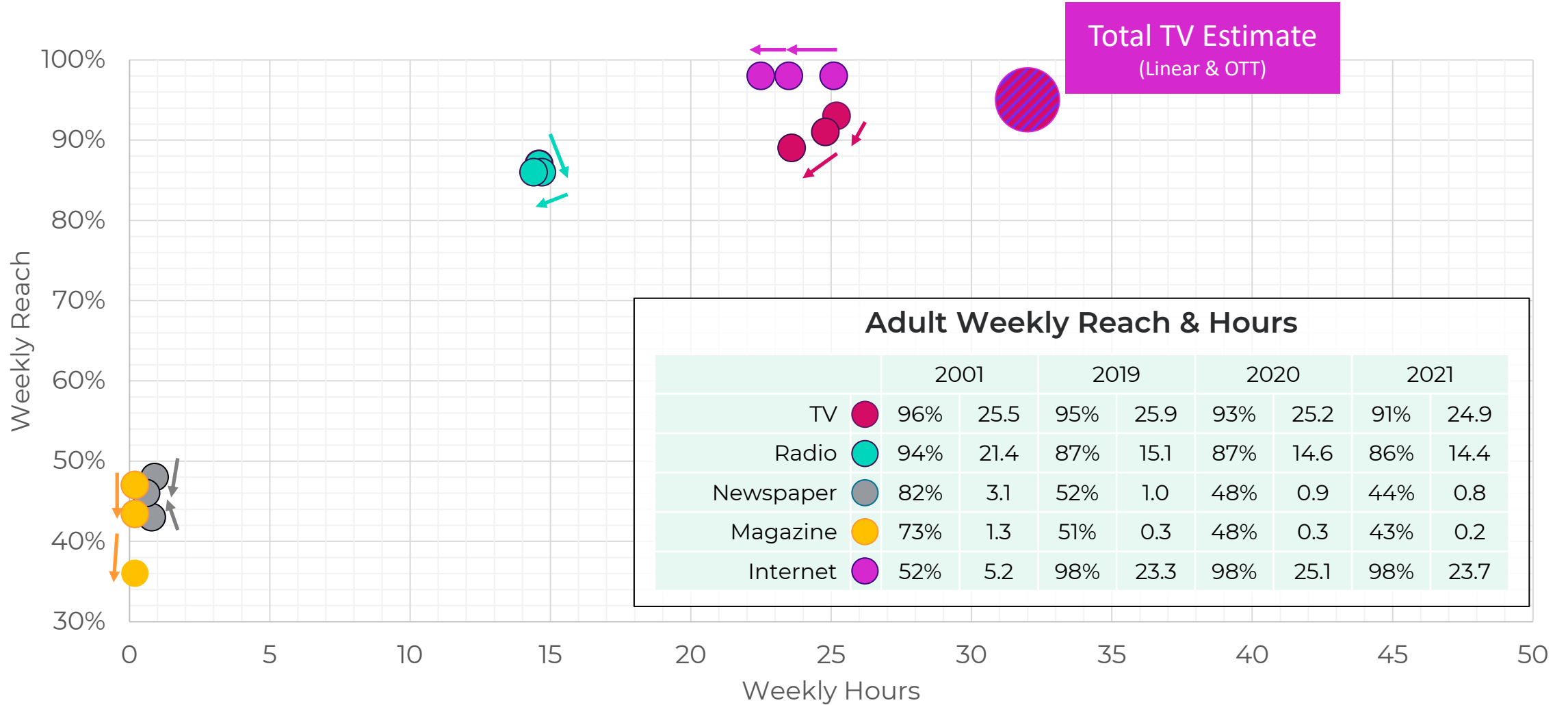
- 01 Reach, Time
- 02 Devices
- 03 Video
- 04 Audio
- 05 The New Normal

Channel Reach & Time

An 18-year trend

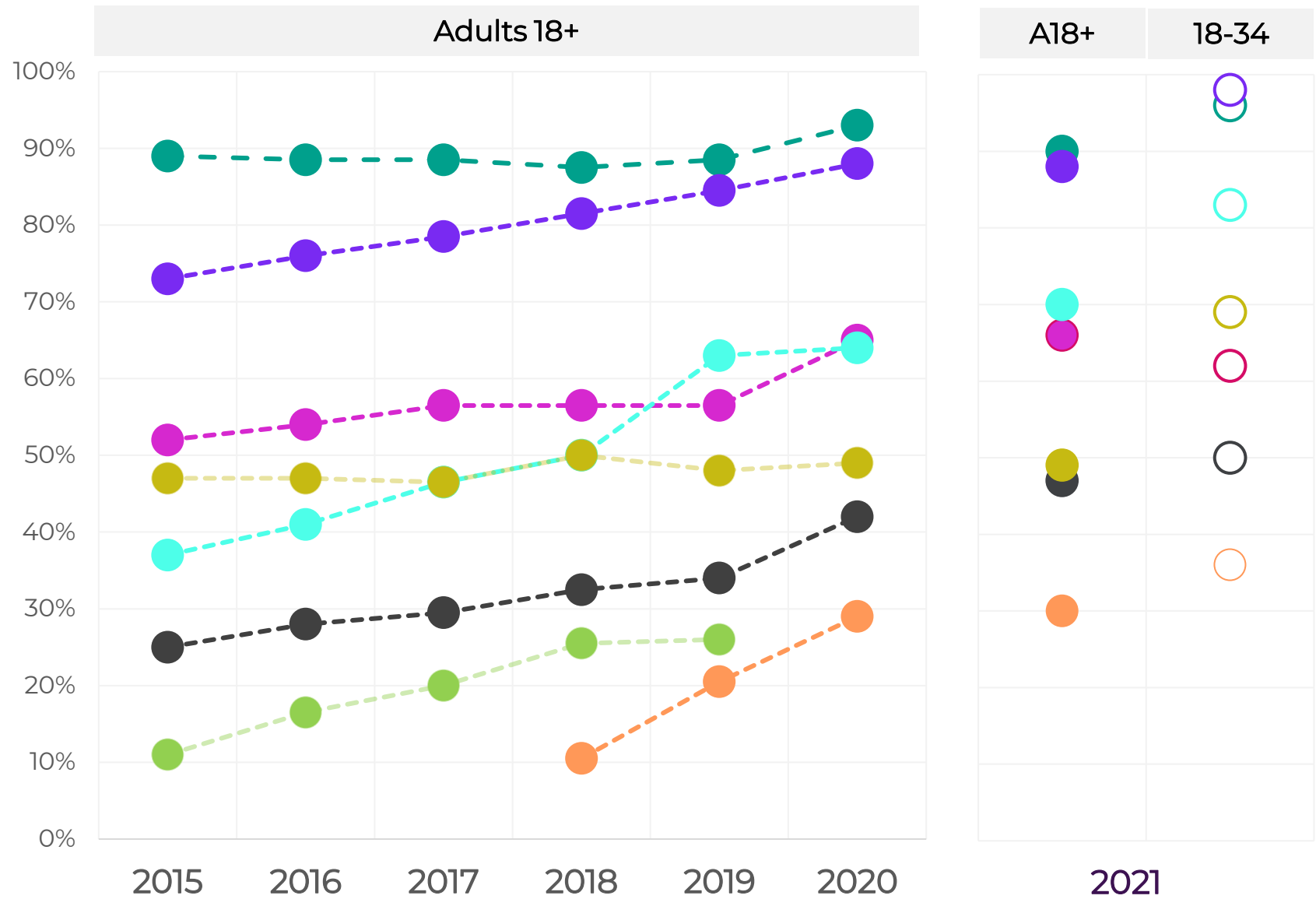
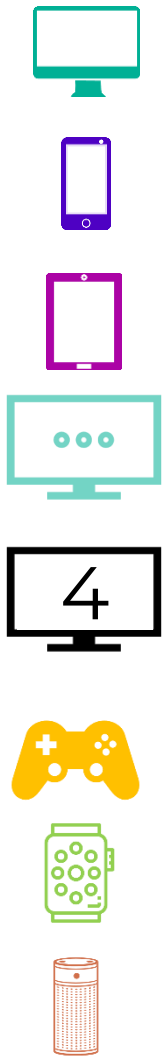


The last 3 years: accelerating trends





Devices

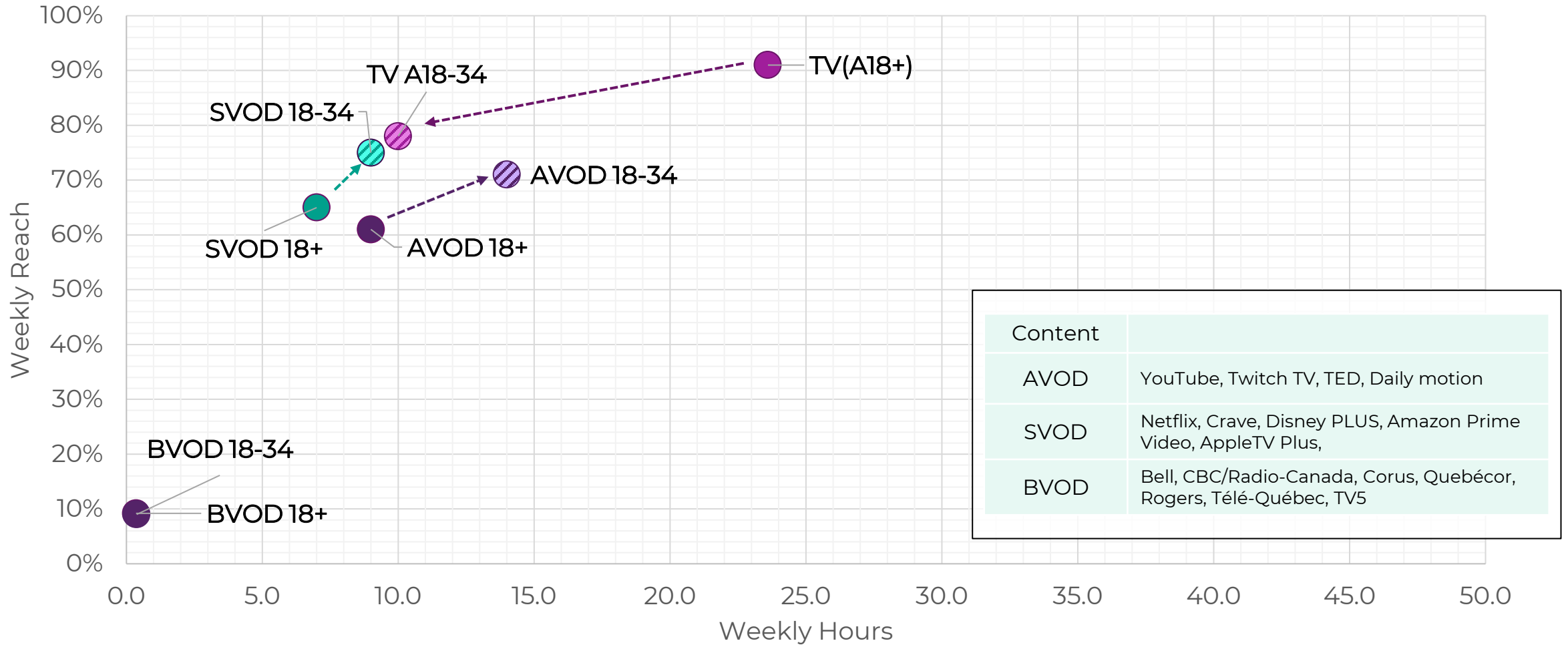


Sources: MTM Spring 2020, Fall 2020 and Spring 2021



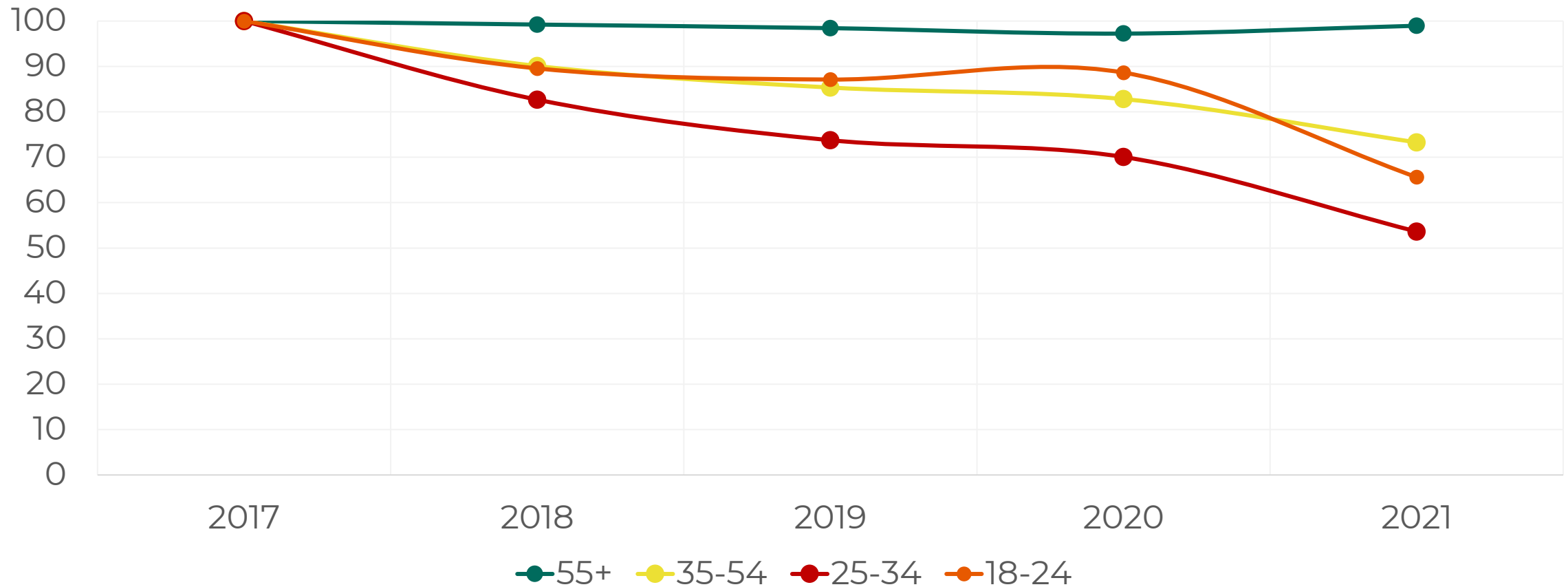
Video

Video habits are evolving rapidly

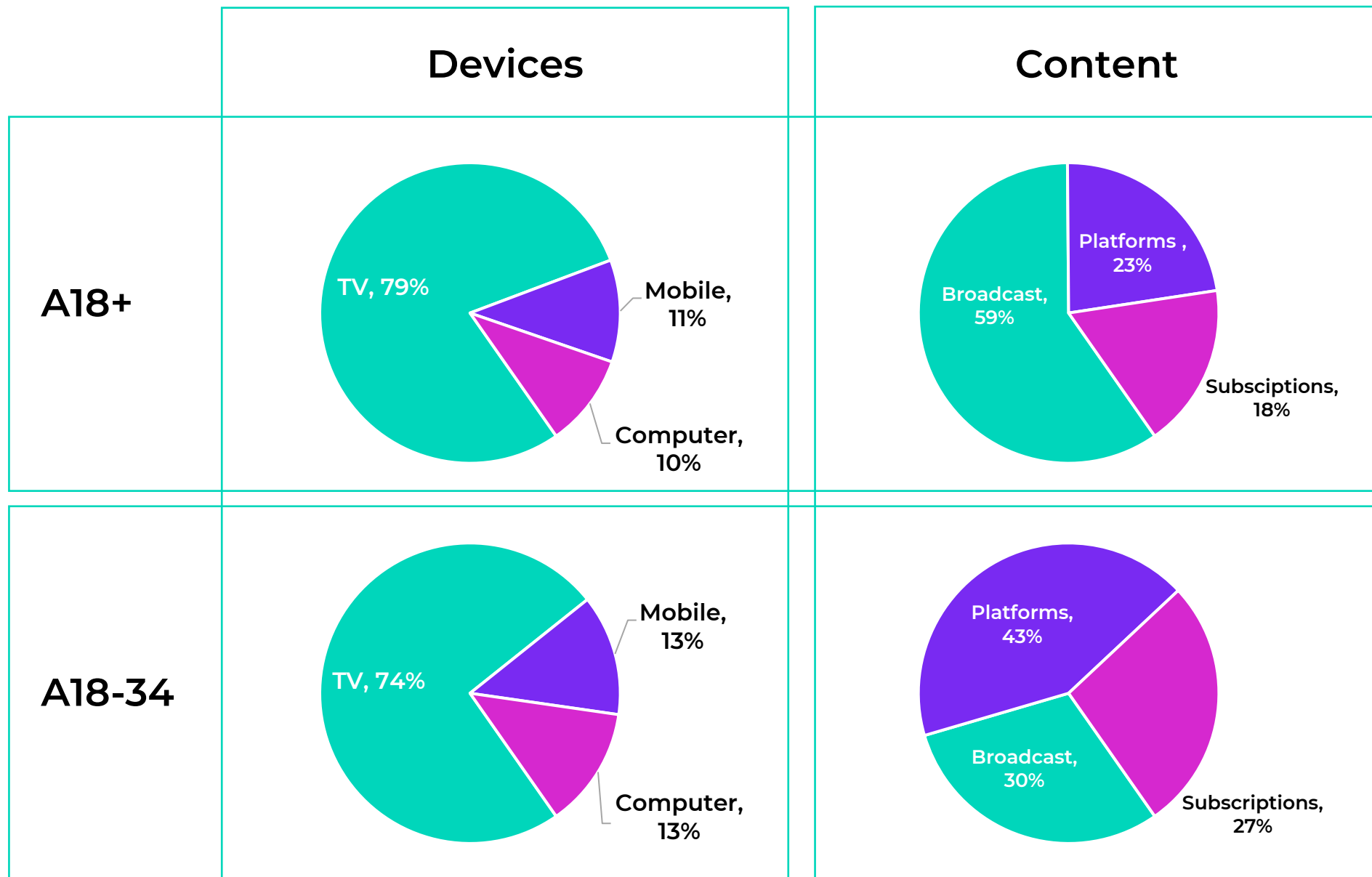


Shift from TV has been uneven

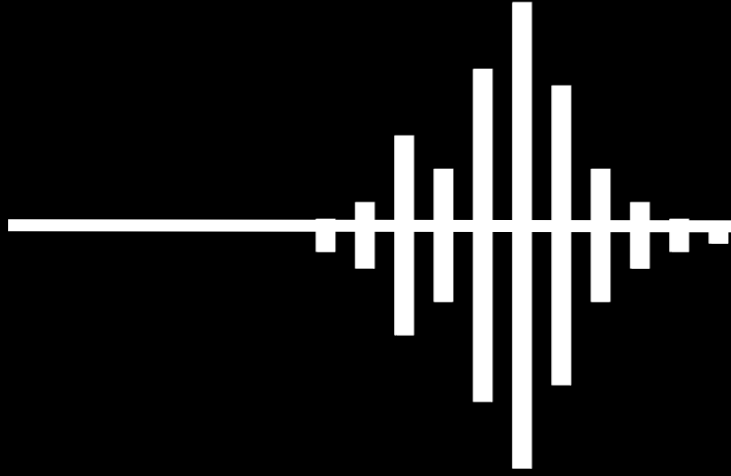
TV Weekly Time Trends by Age Group
(Indexed to 2017)



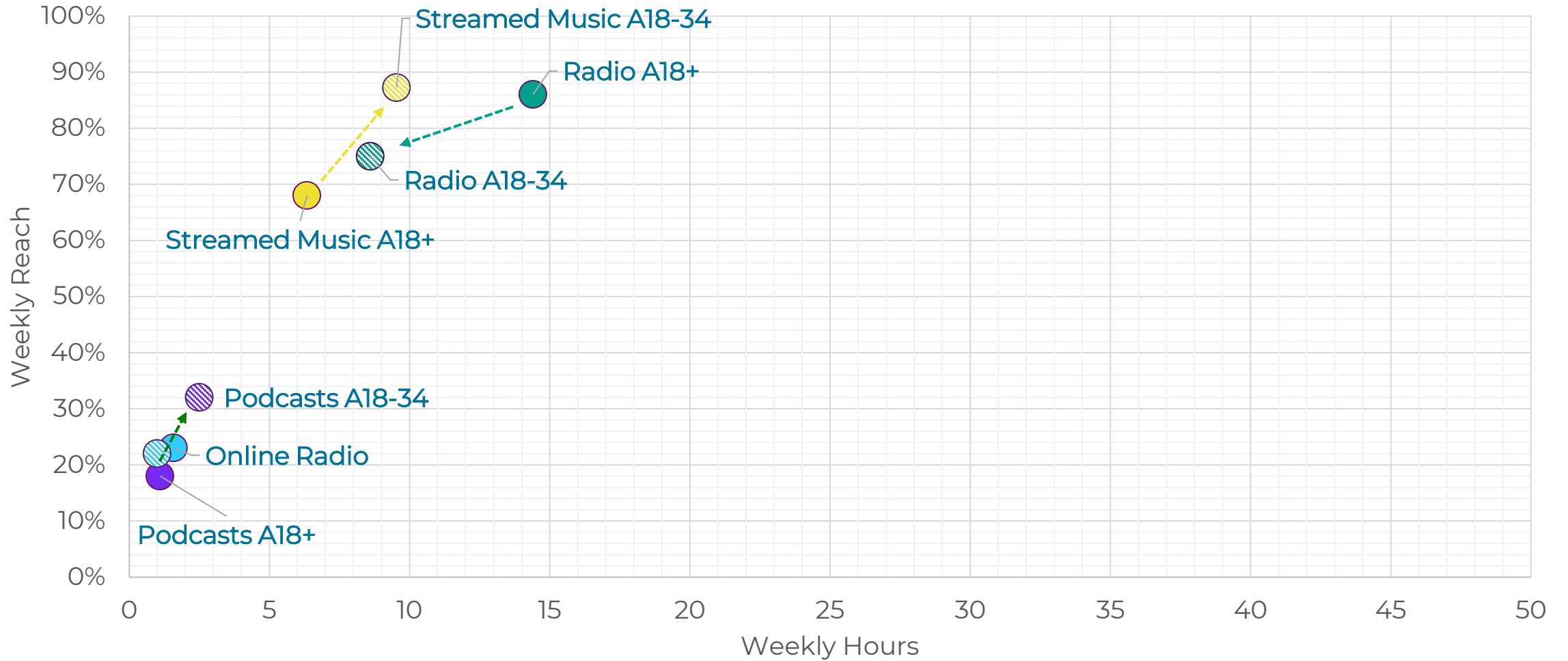
Share of Video Time



Source: Numeris PPM TV, VAM, PHD estimates from multiple industry sources, Vividata Metrica

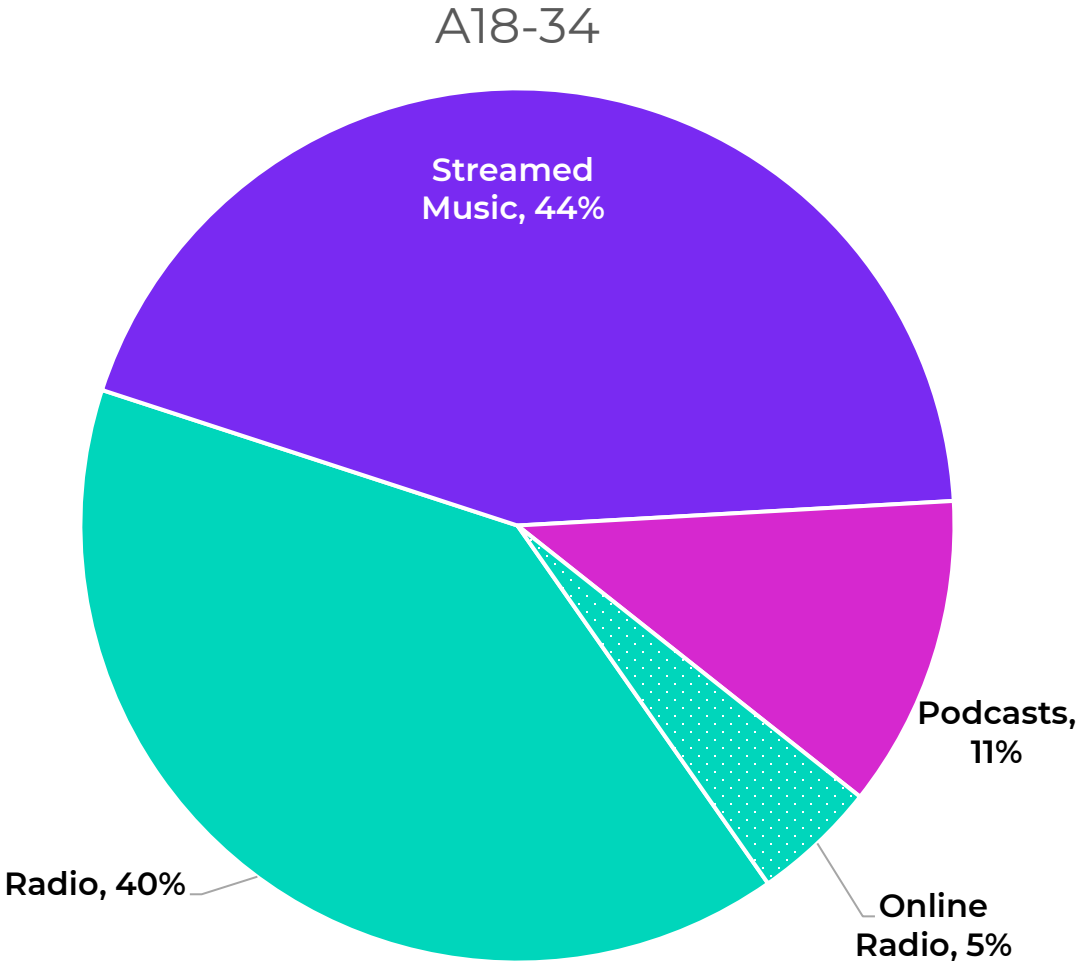
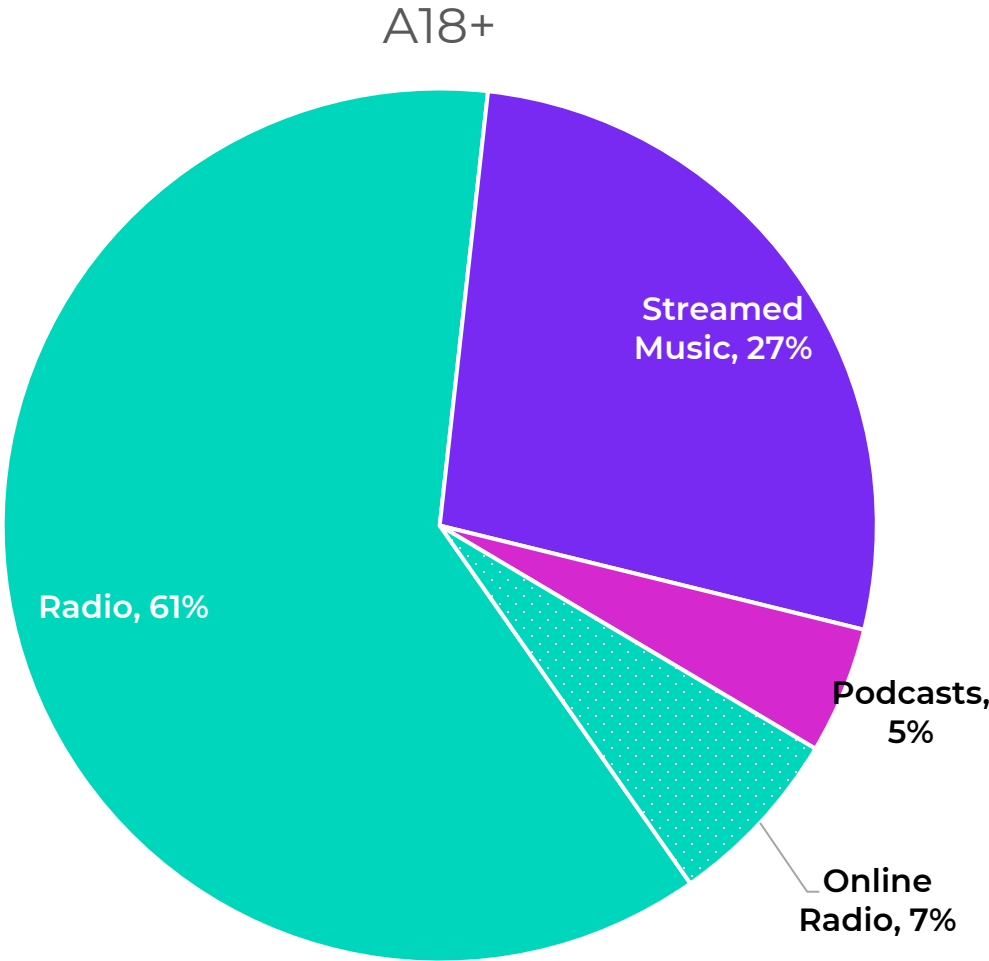


Audio



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

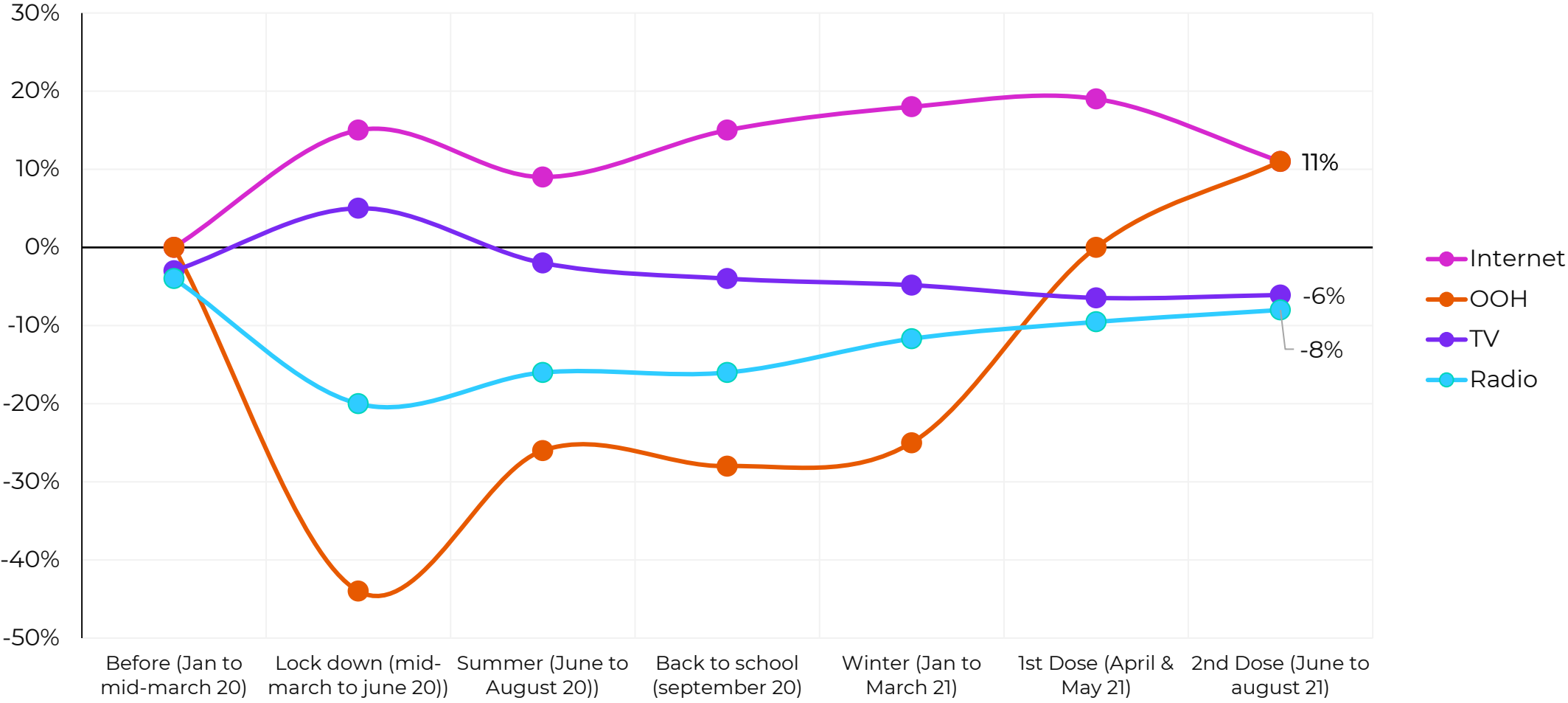
Share of Audio Time



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

The New Normal

The COVID Effect



Sources: Numeris PPM TV & Radio AvHrsWk (Cap); OOH Pattison Outdoor Furthest range of movement (KM); AvHrsWk (Cap) Internet SimilarWeb & PHD Estimates from multiple sources

Total Subscription spends increased during Covid

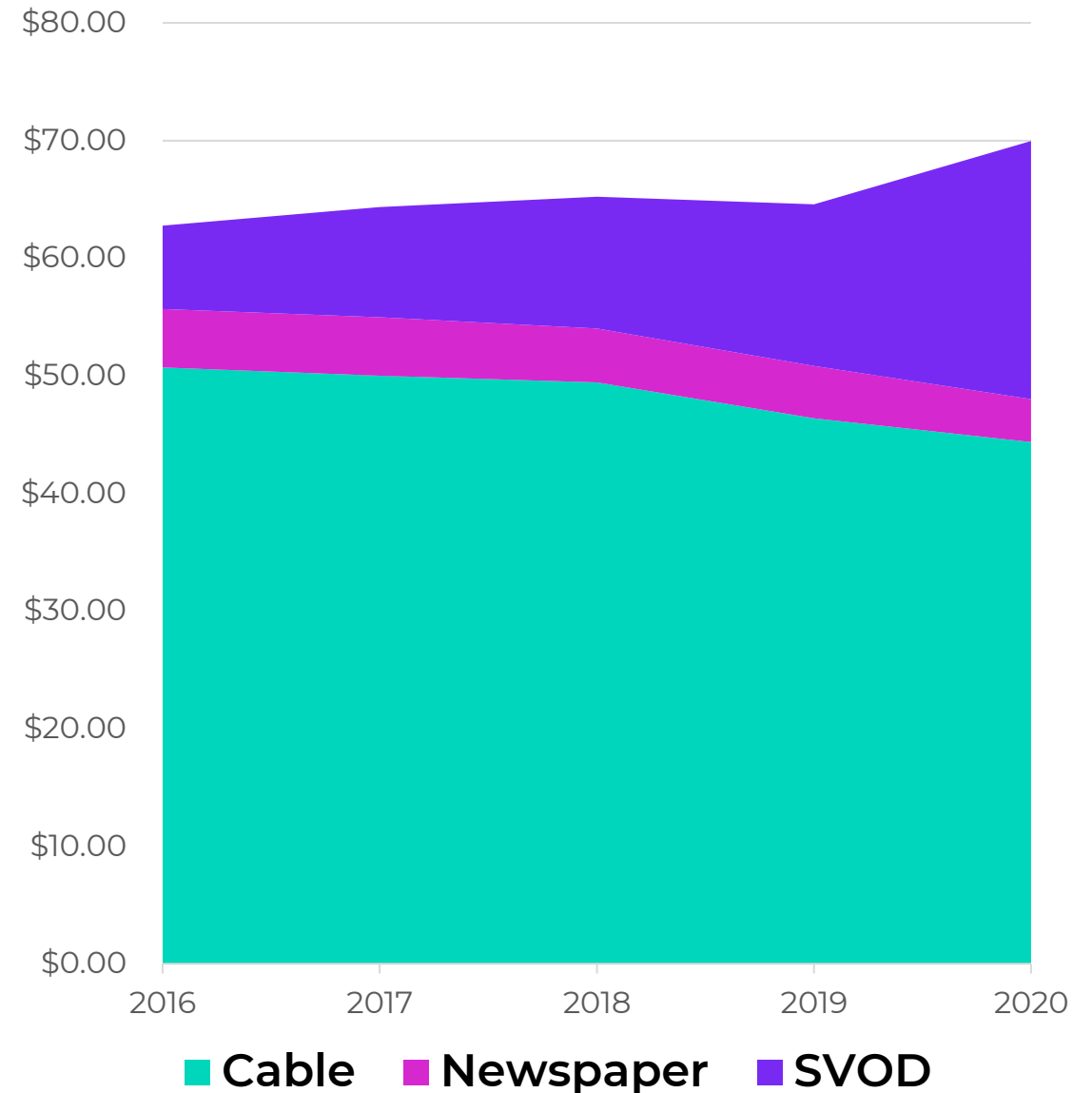
~\$70

Average monthly household expenditure on Cable, SVOD and Newspaper

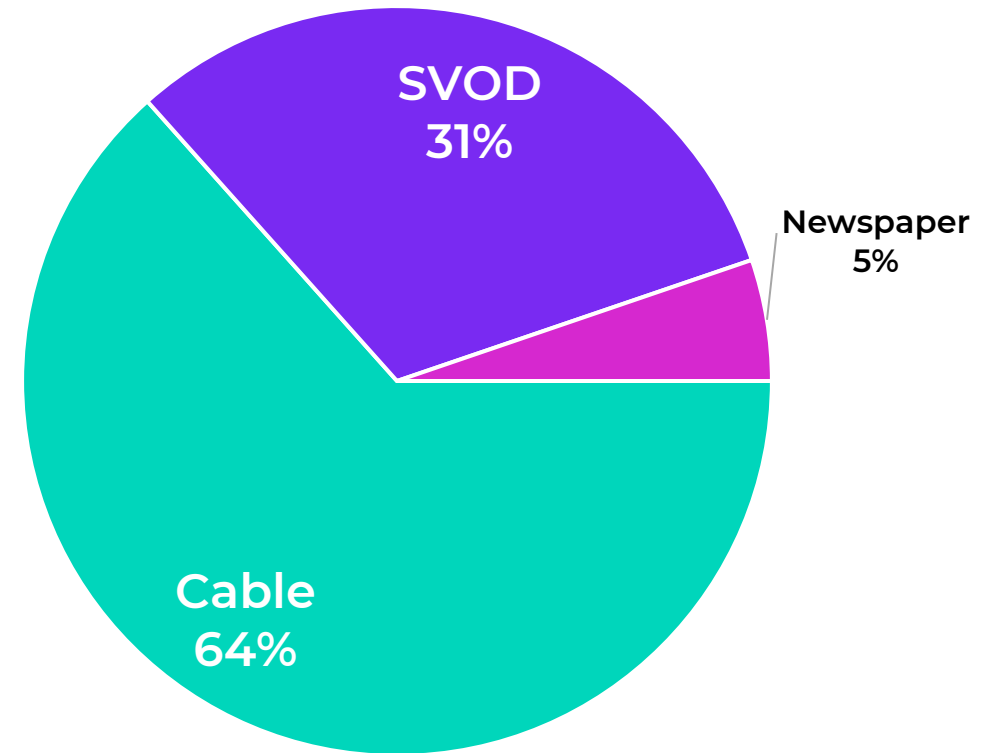
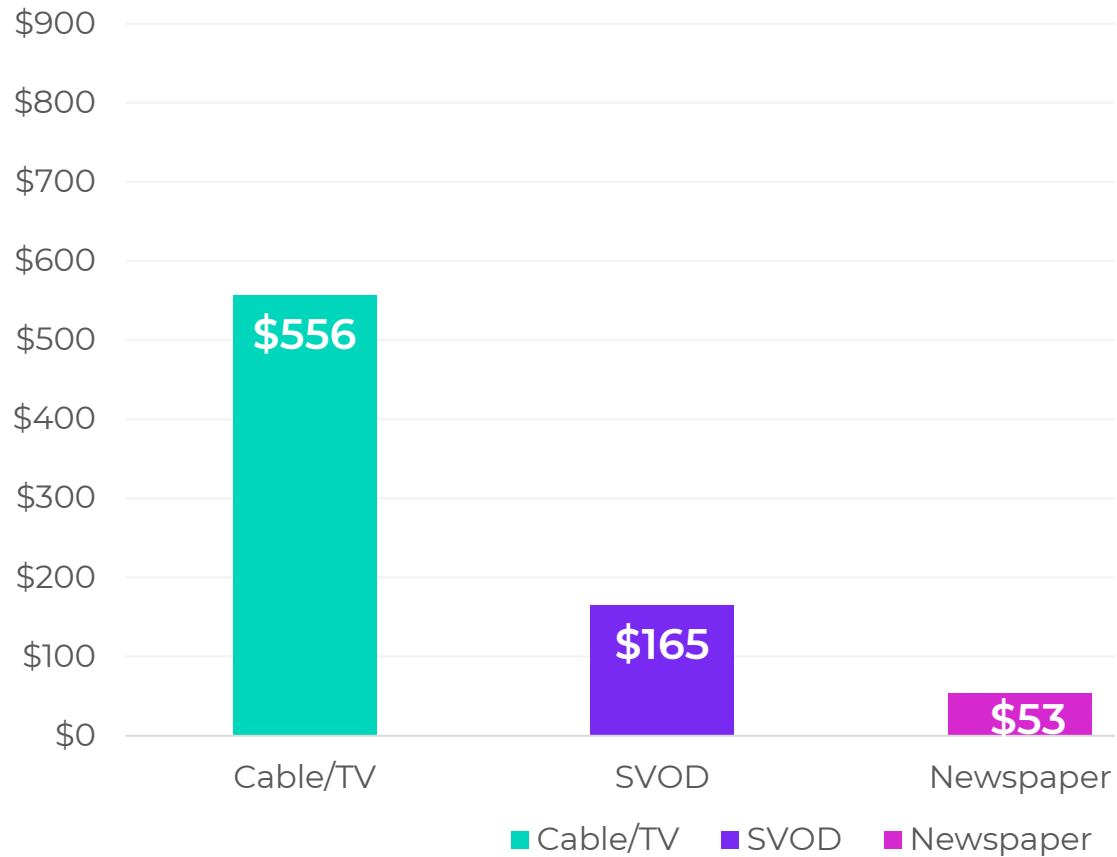
~8%

Increase vs 2019

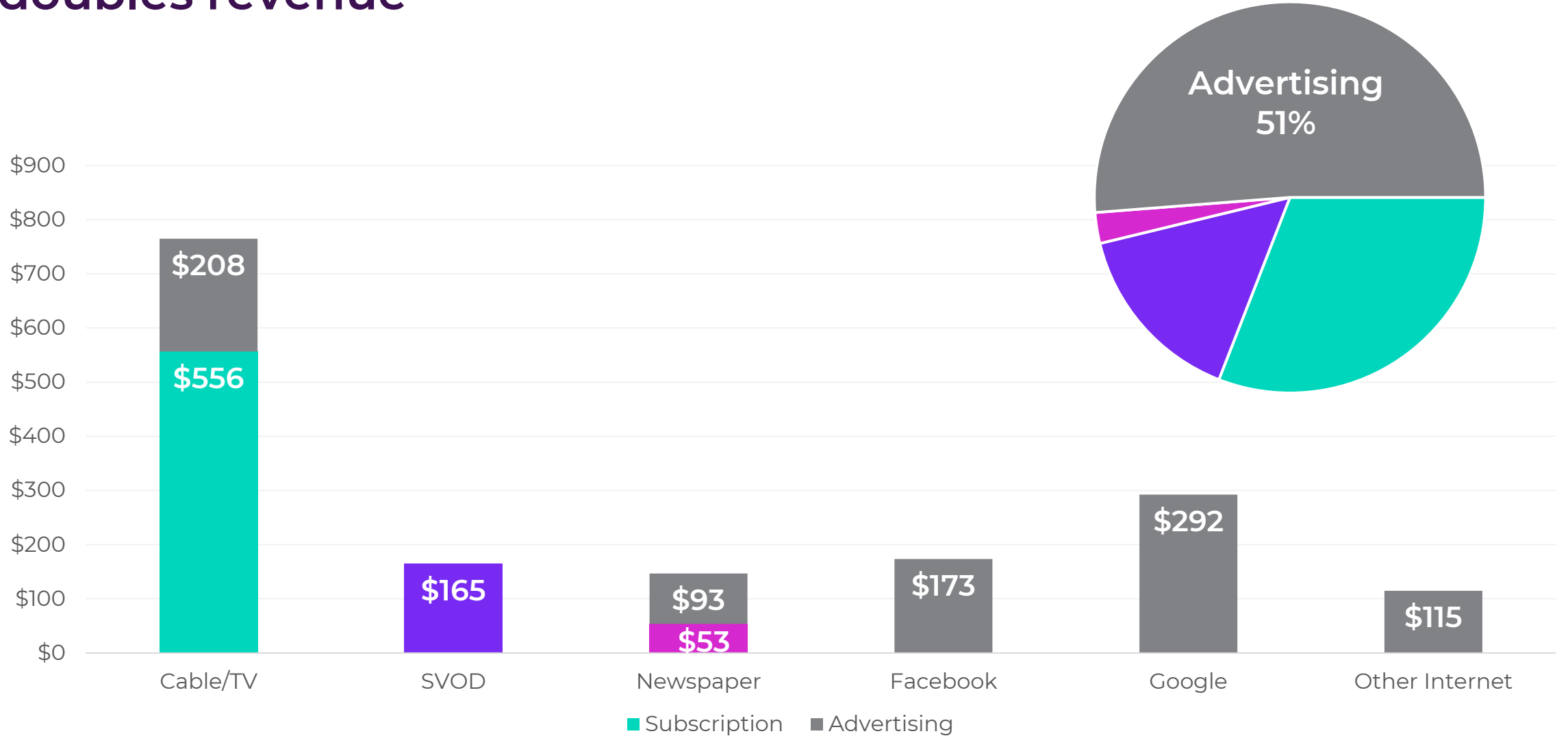
Estimated Subscription Costs per Canadian Household



Video Services Dominate Annualized Share of Subscriptions



Estimates suggest advertising doubles revenue





The 'Consumer' Perspective

- 01 Reach, Time
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The Industry Perspective

- 01 The Shift
- 02 Rise of Reporting
- 03 Engineered Serendipity
- 04 Digital Commerce
- 05 Shallow Living
- 06 Purpose Pervasion



Do you have a healthy relationship with **technology**?

Is your **talent** in good shape?

Are you maintaining the right **processes**?

Are you nurturing the right **insights**?

How are you **measuring** success?

\$14.8M
Total Spend



\$56.1M
Total Sales

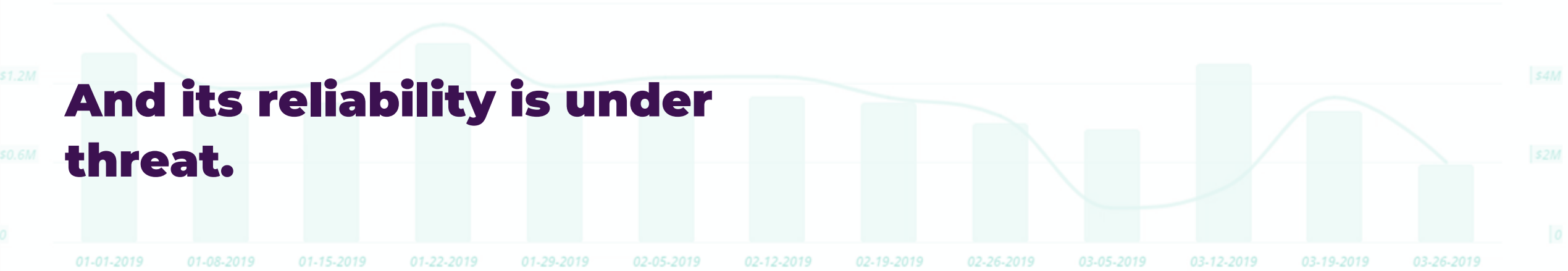


\$3.75
Total ROI



Reporting has become the most common marketing task¹.

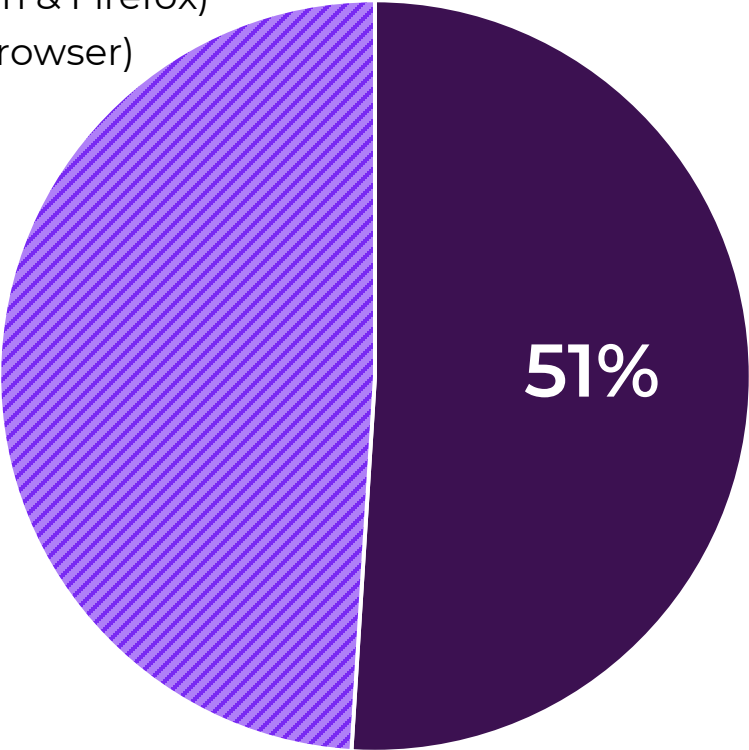
And its reliability is under threat.



1. May 2021 global survey of 1,721 experienced marketing professionals undertaken by PHD & WARC

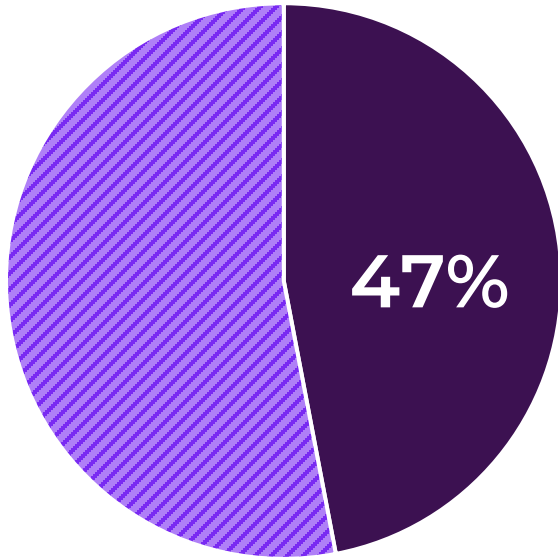
The 'Attribution Gap' is big

24h lookback window on clicks only (Safari & Firefox)
People refuse cookies on websites (any browser)
No tracking between apps (iOS)

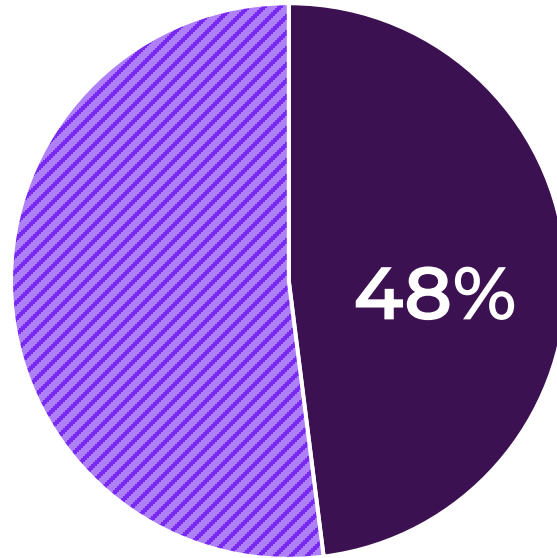


User Opt-In for App tracking (iOS)
Cookie Data not currently blocked (Chrome)

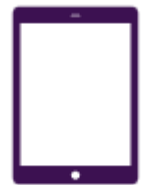
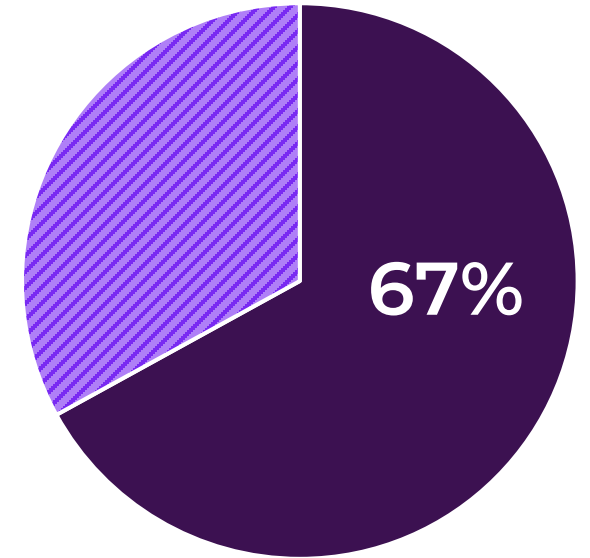
With some variation across devices



Mobile



Computer

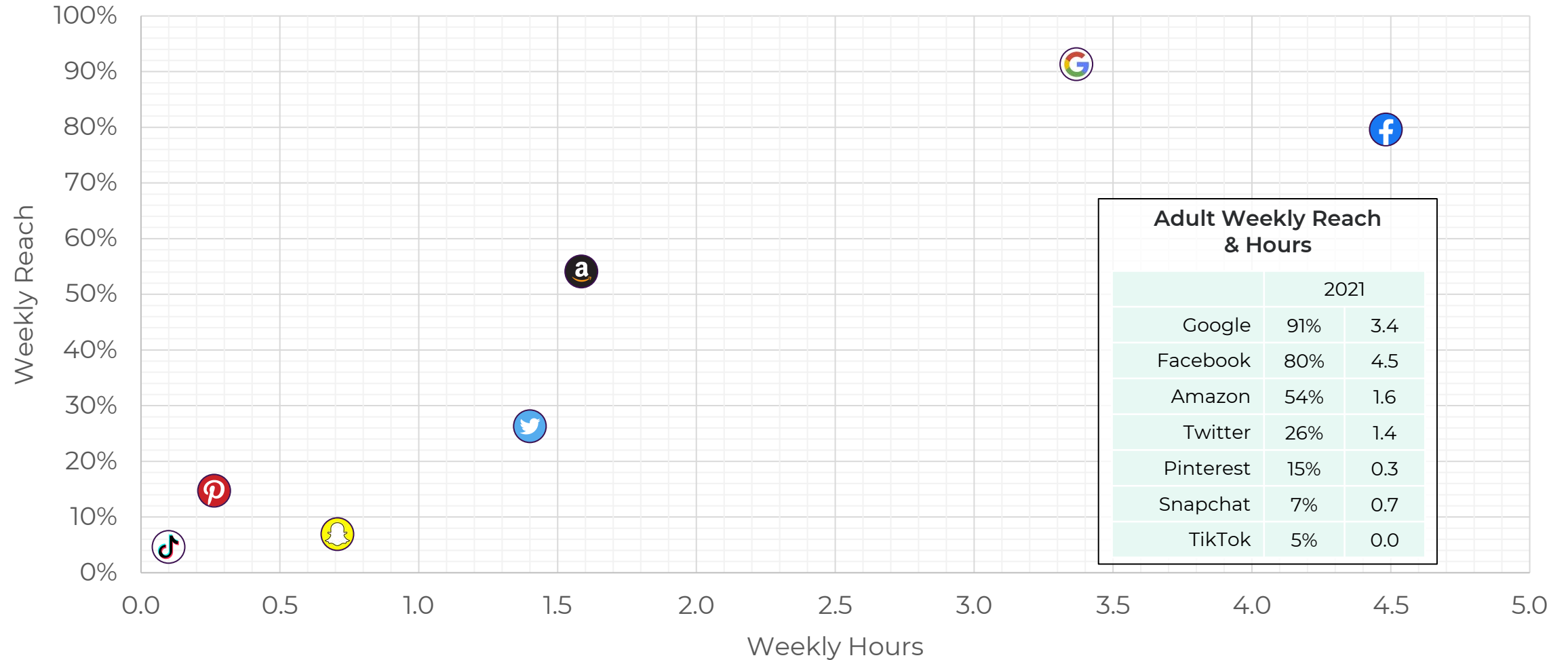


Tablet

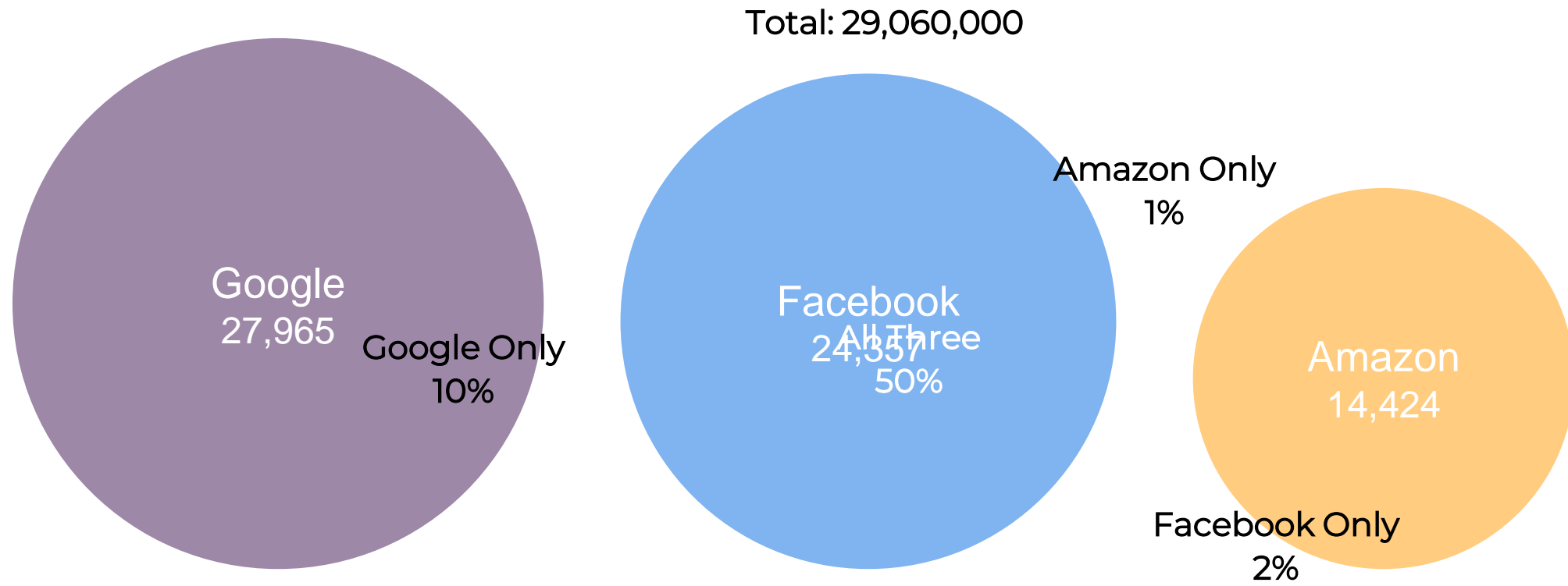


Engineered Serendipity

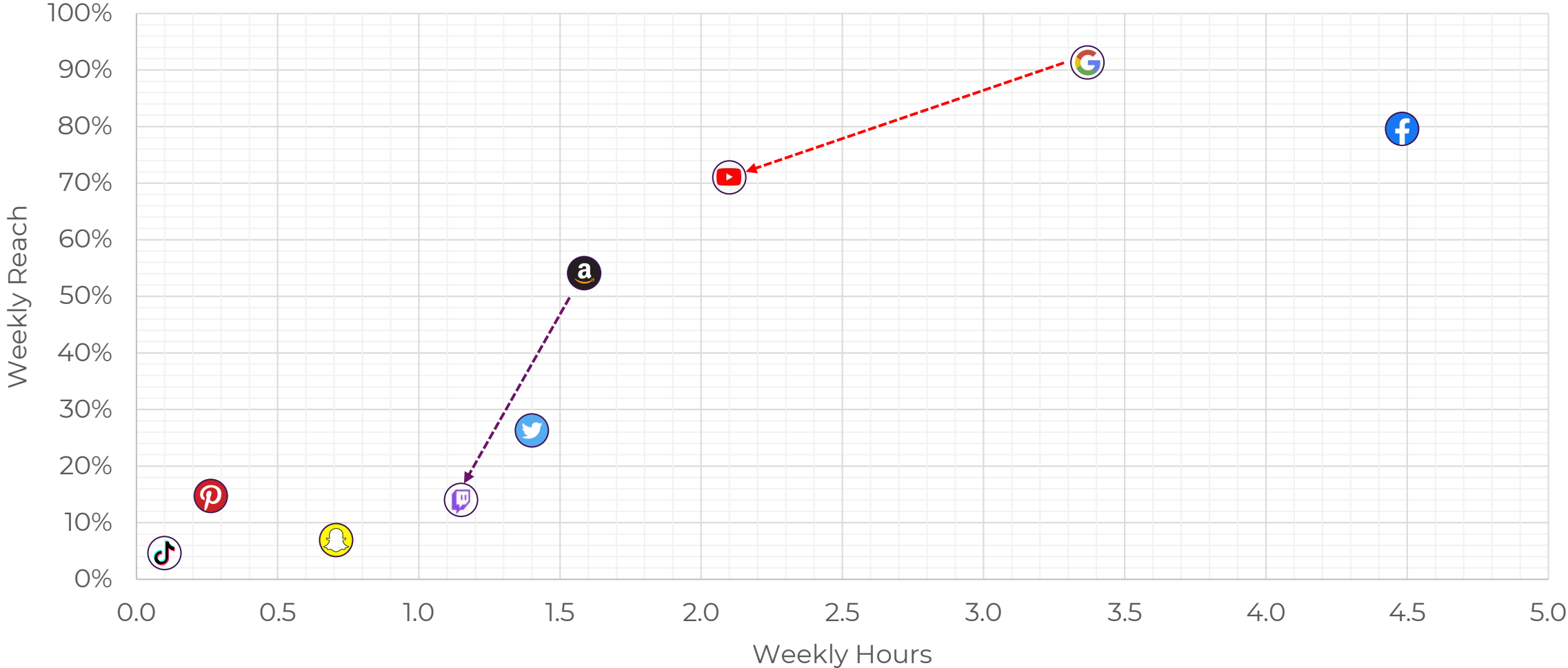
Walled Garden Reach & Time



Source: Vividata Metrica Summer 2021, A18+

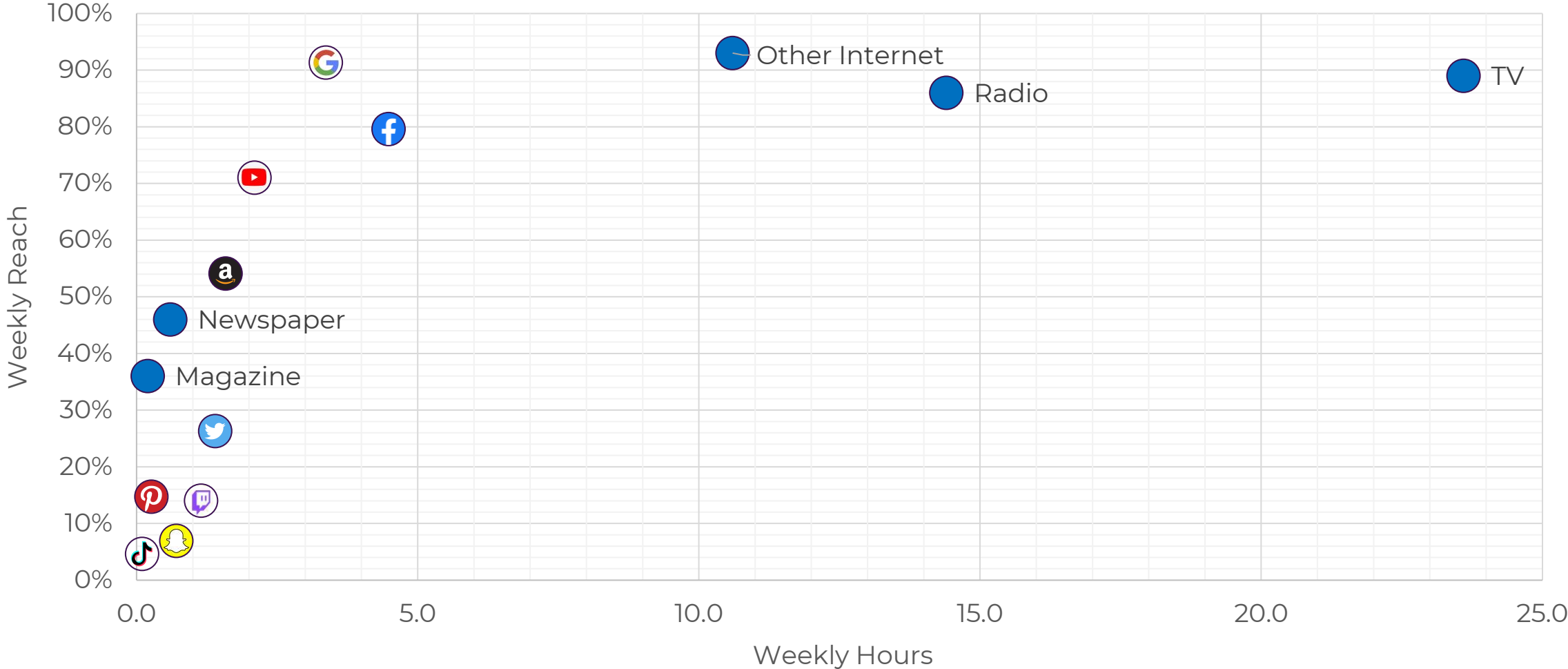


The 'media time' in the Walled Gardens



Source: Vividata Metrica Summer 2021, A18+

The wider context



Source: Vividata Metrica Summer 2021, A18+



**Ad or Website
Reporting**

**Panel - based
Measurement**

**Brand & Business
Reporting**

**Ad or Website
Reporting**

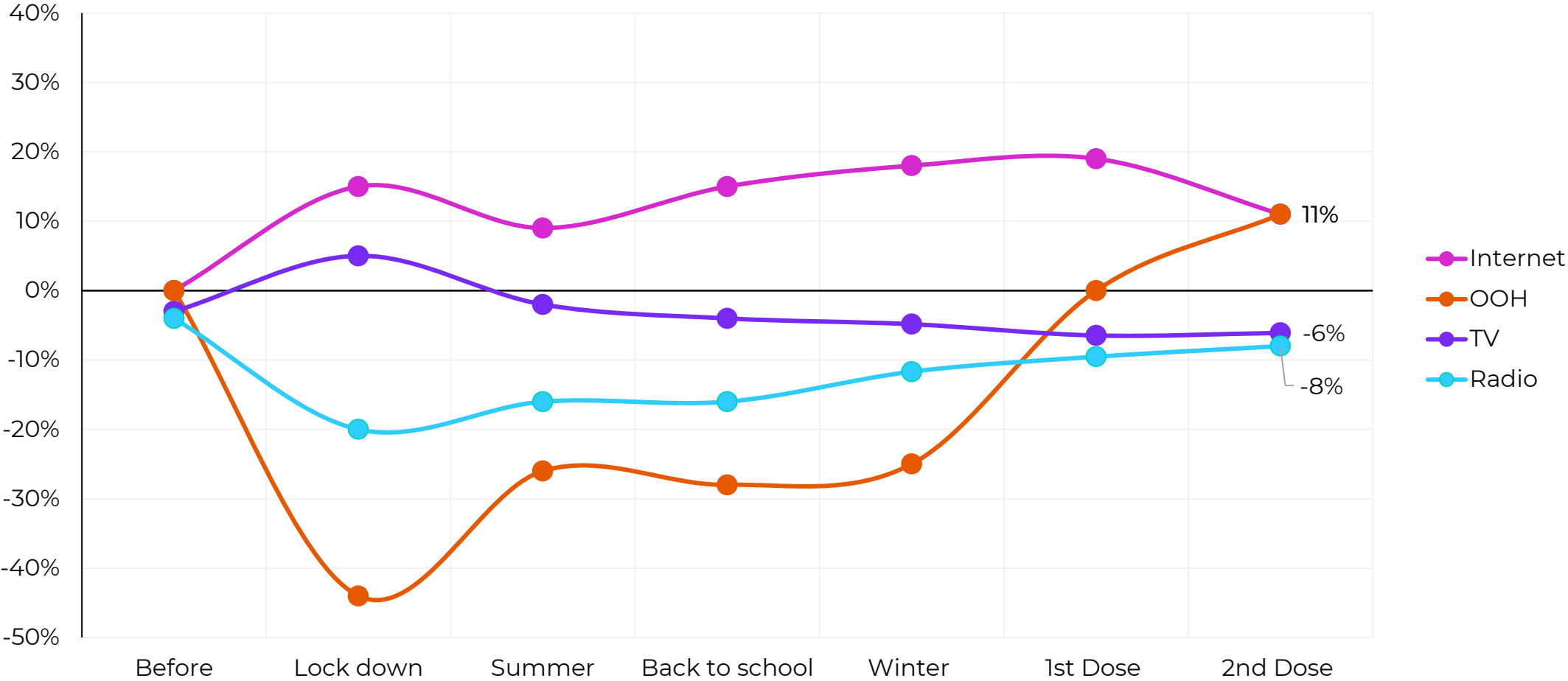
**Panel - based
Measurement**

**Brand & Business
Reporting**



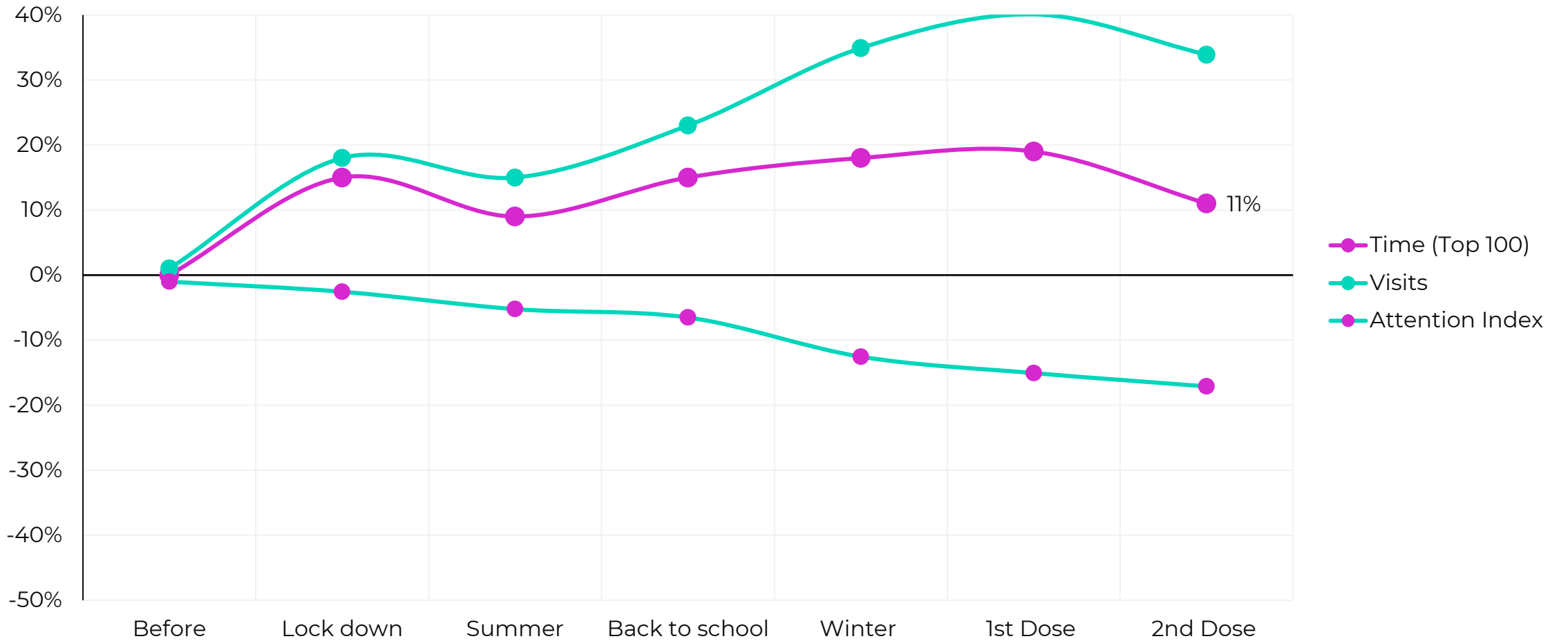
Shallow Living

The COVID effect on time

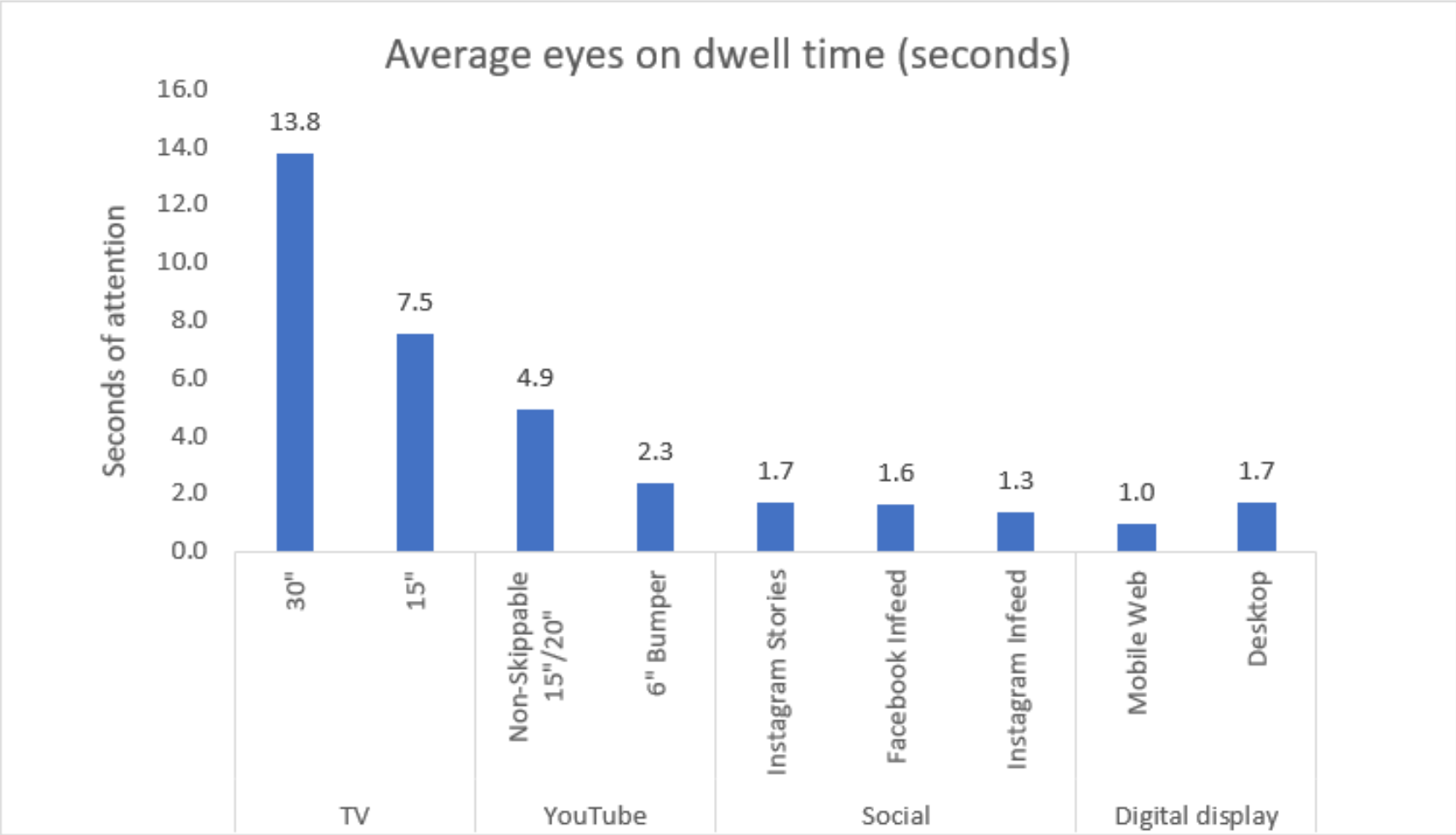


Sources: Numeris PPM TV & Radio AvHrsWk (Cap); OOH Pattison Outdoor Furthest range of movement (KM); AvHrsWk (Cap) Internet SimilarWeb & PHD Estimates from multiple sources

The COVID effect on attention?



Ad attention is already shallower

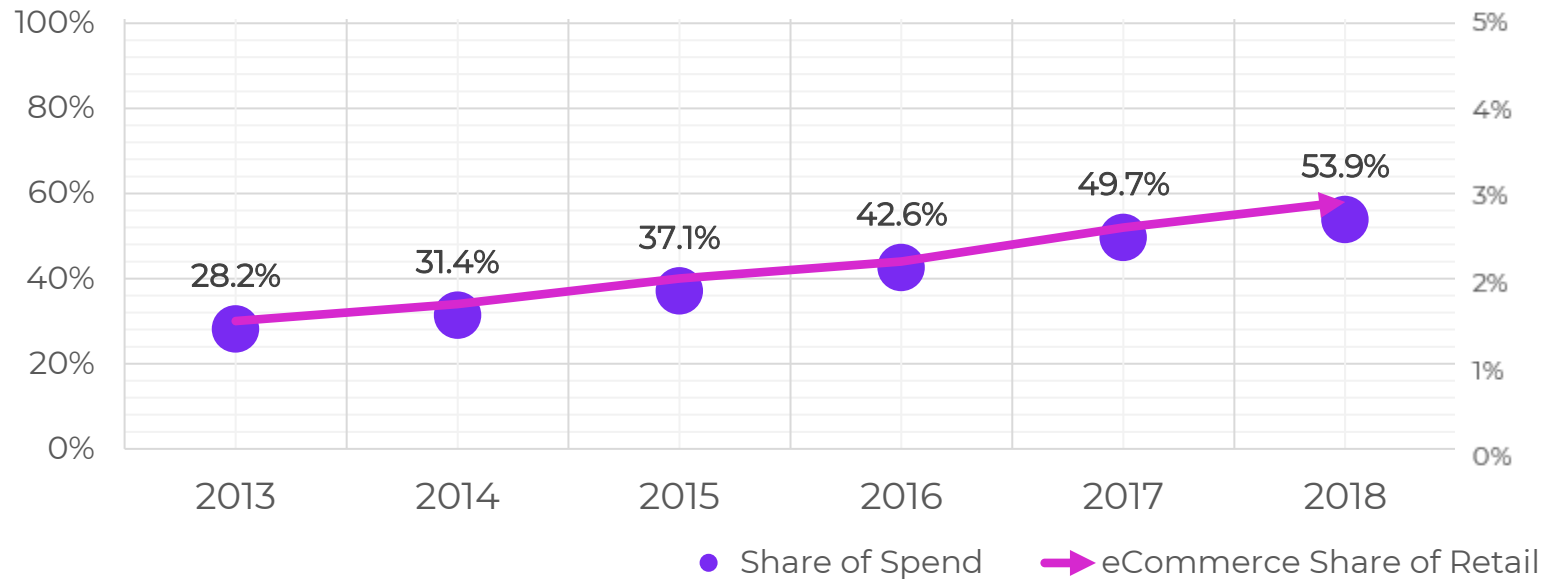




Digital Commerce

Digital ad growth tightly linked to Digital Commerce

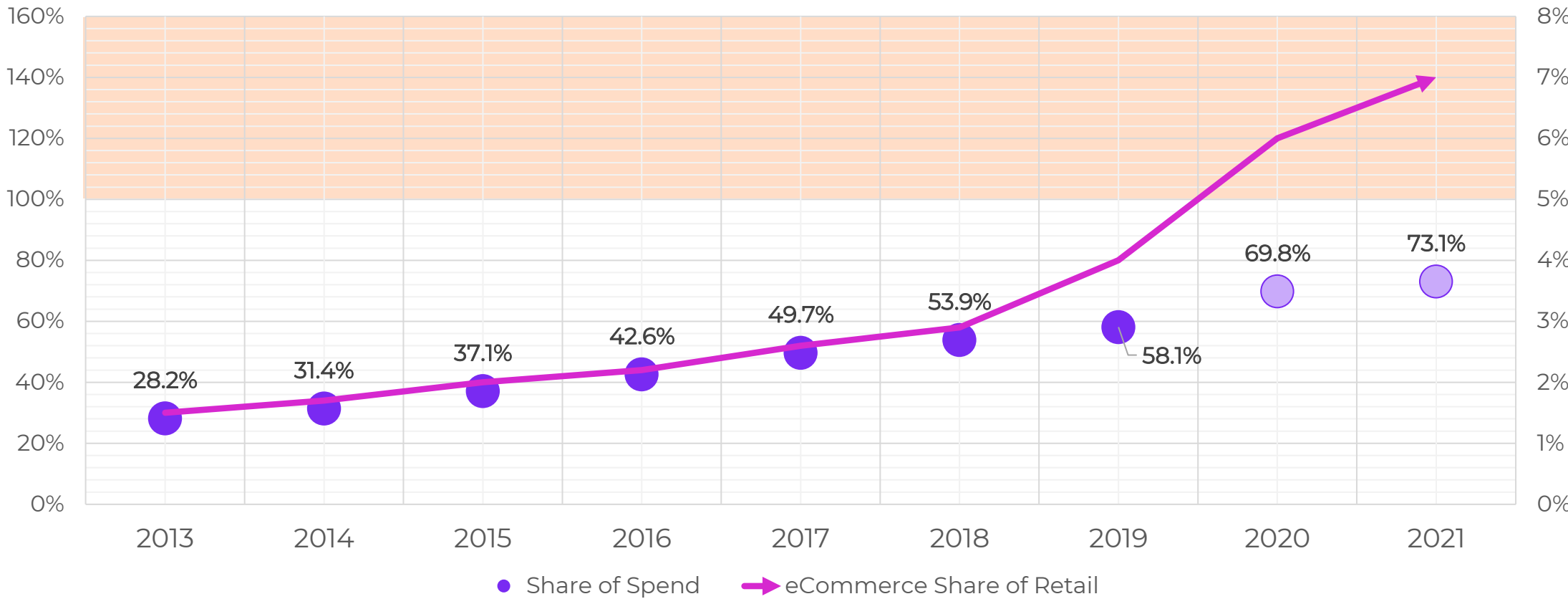
Internet Share of Spend vs eCommerce Share of Retail



Source: Think TV compilation of Ad Spend data & Statistics Canada Table 20-10-0065-01 Retail trade, total sales and e-commerce sales, Table 20-10-0072-01 Retail e-commerce sales, unadjusted

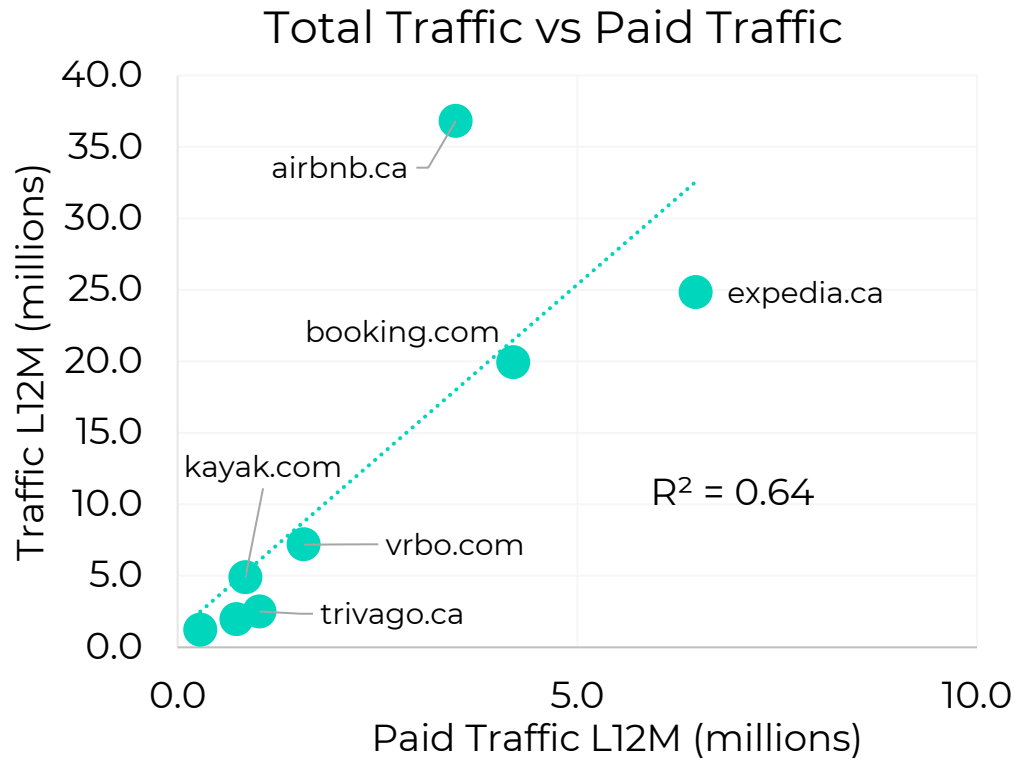
As Digital Commerce accelerates, the pressure mounts

Internet Share of Spend vs eCommerce Share of Retail



Source: Think TV compilation of Ad Spend data to 2019. Ad spend for 2020 and 2021 estimated using SMI trends. Statistics Canada Table 20-10-0065-01 Retail trade, total sales and e-commerce sales, Table 20-10-0072-01 Retail e-commerce sales, unadjusted

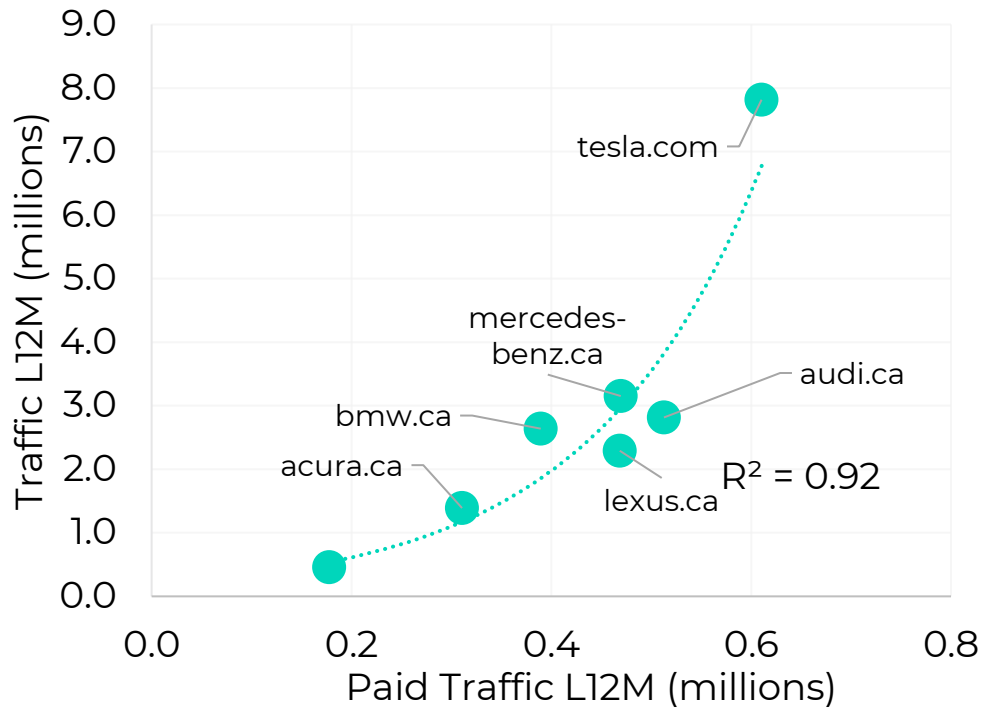
The biggest websites tend to get the most traffic from paid sources



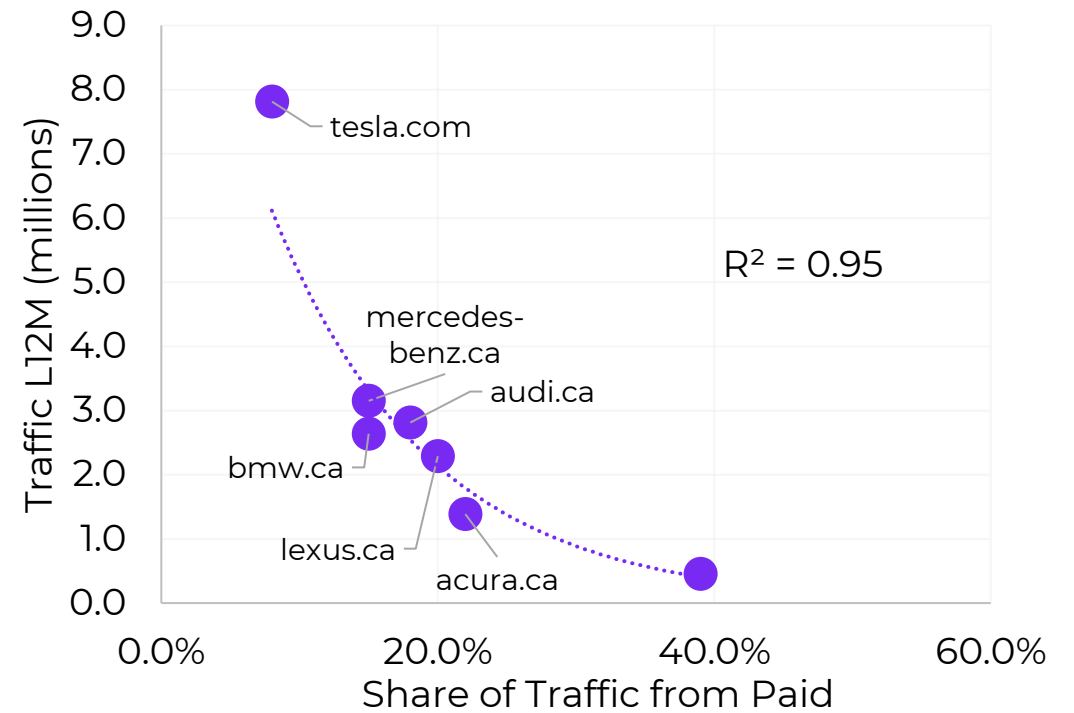
A Digital Media Paradox

Luxury Cars

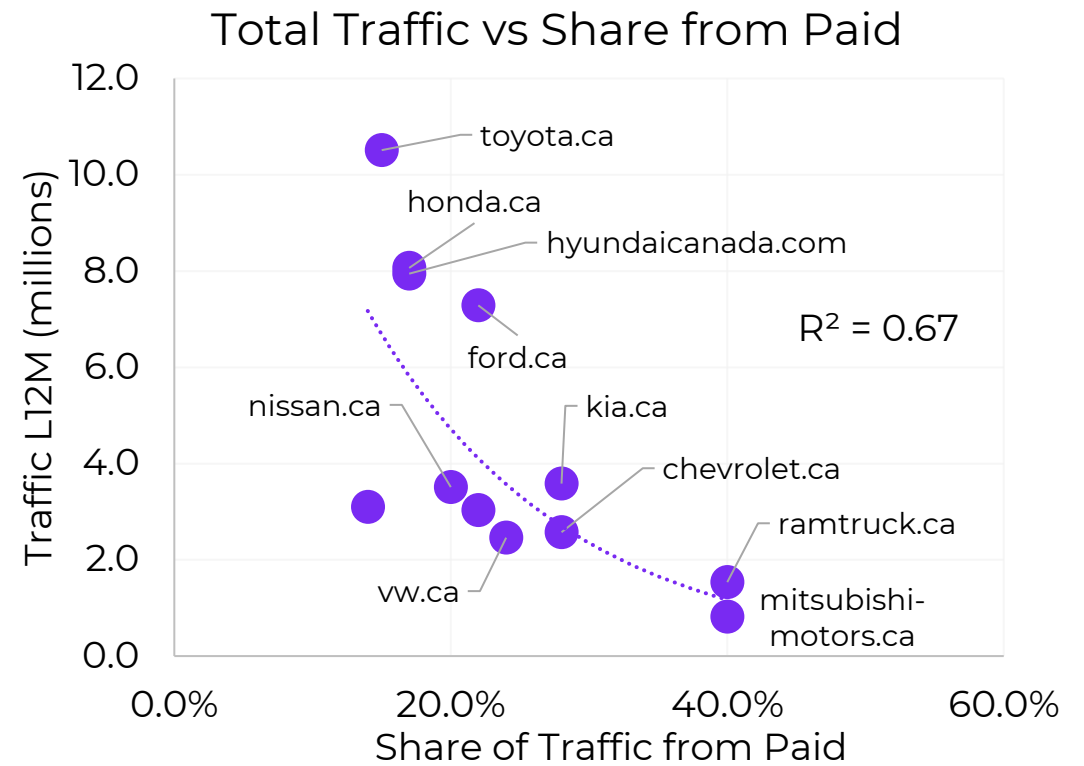
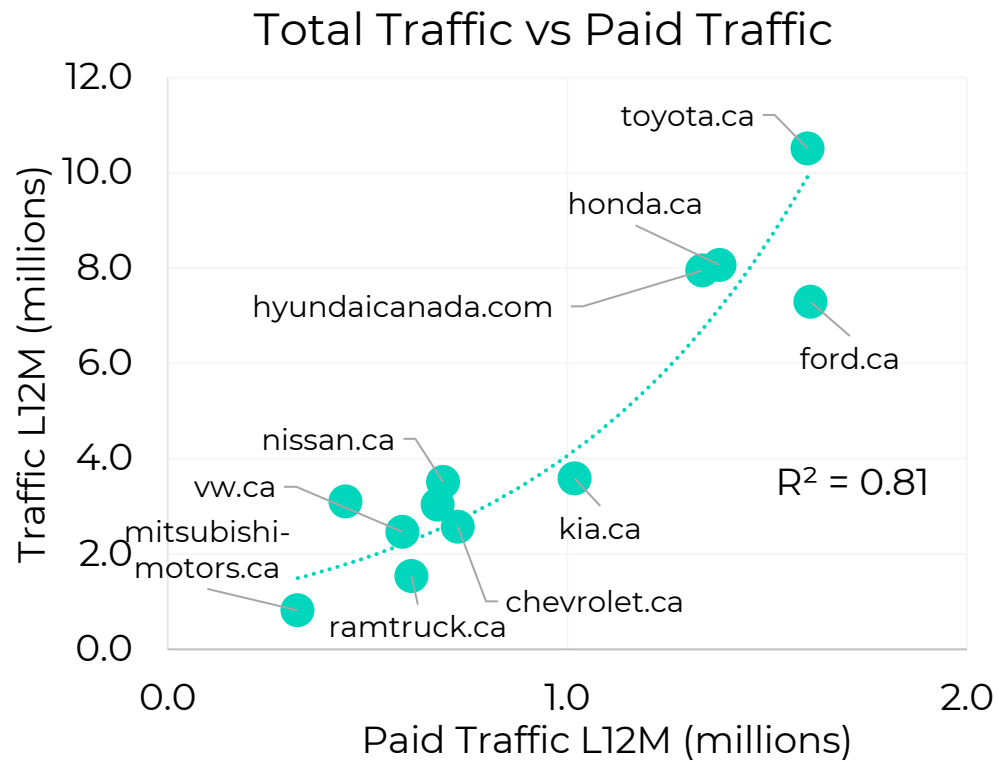
Total Traffic vs Paid Traffic



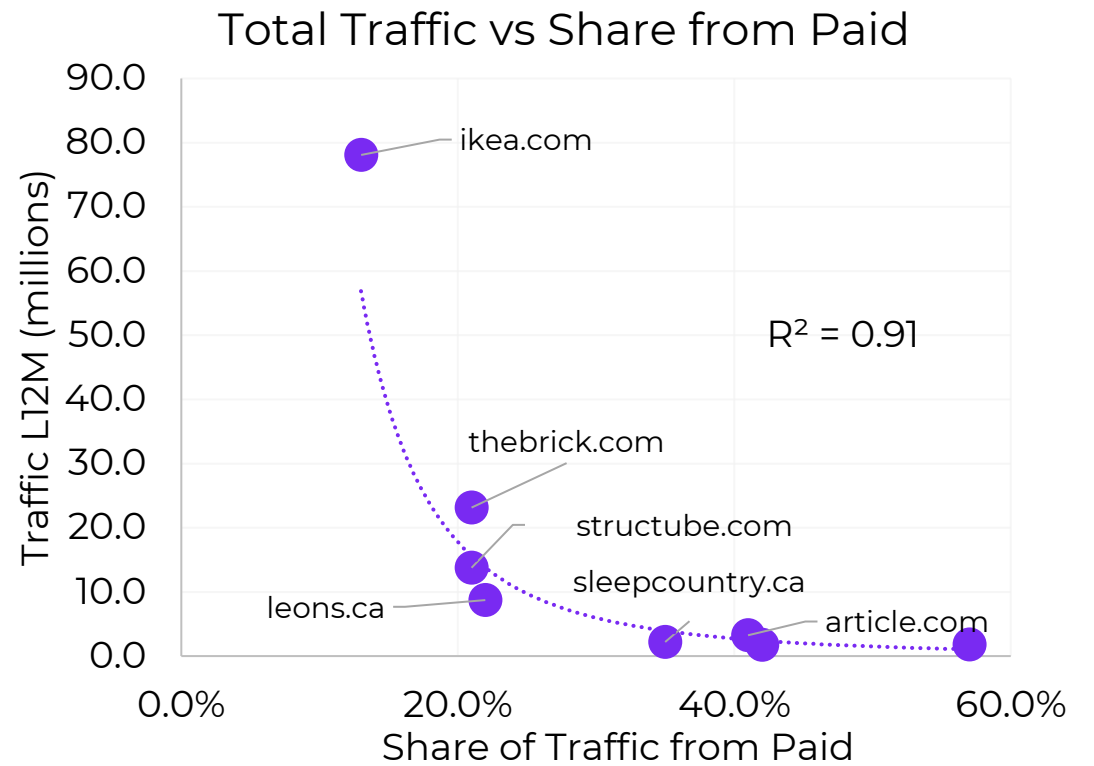
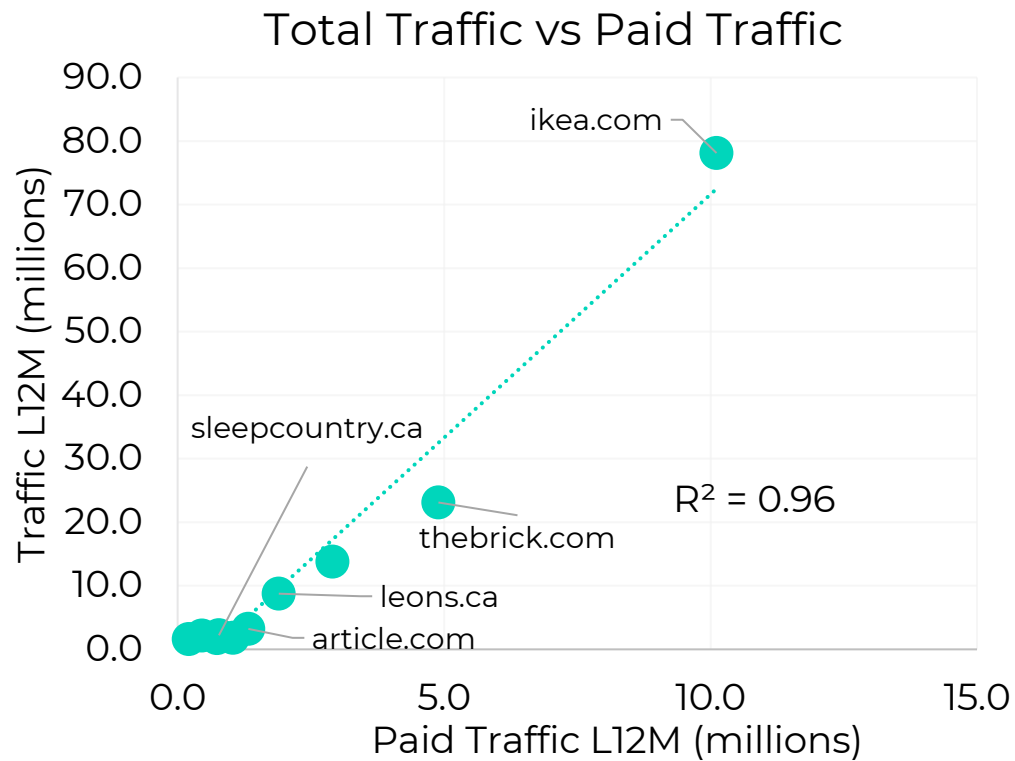
Total Traffic vs Share from Paid



Mass Market Cars

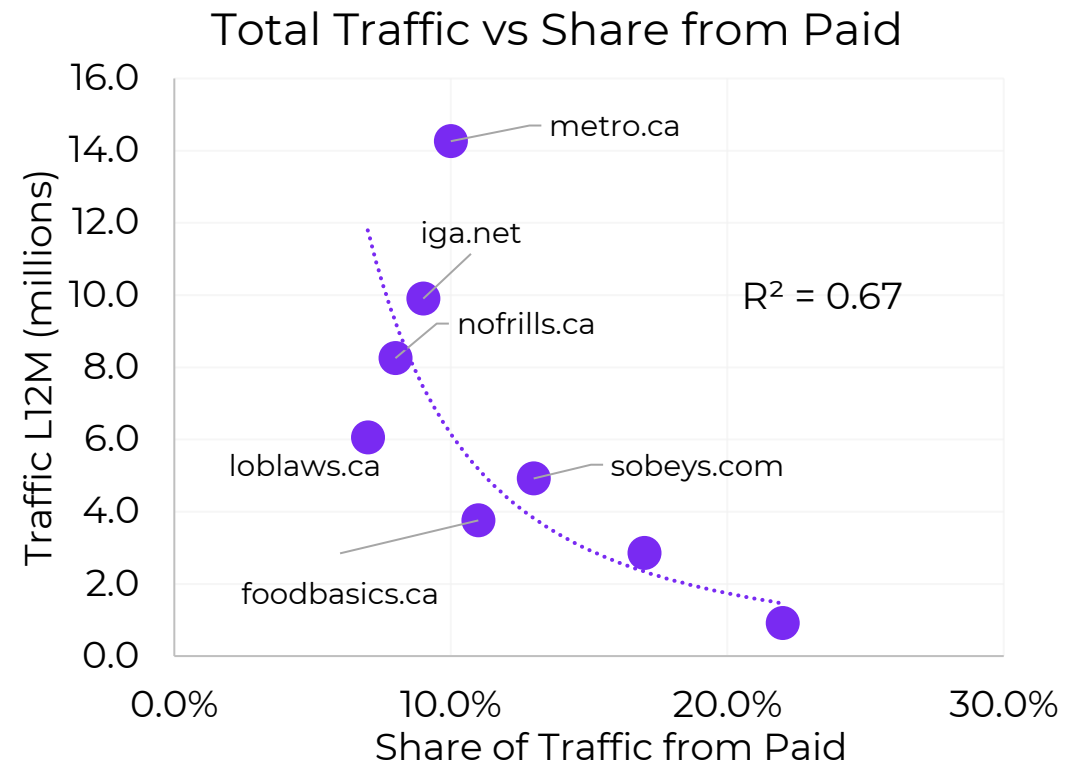
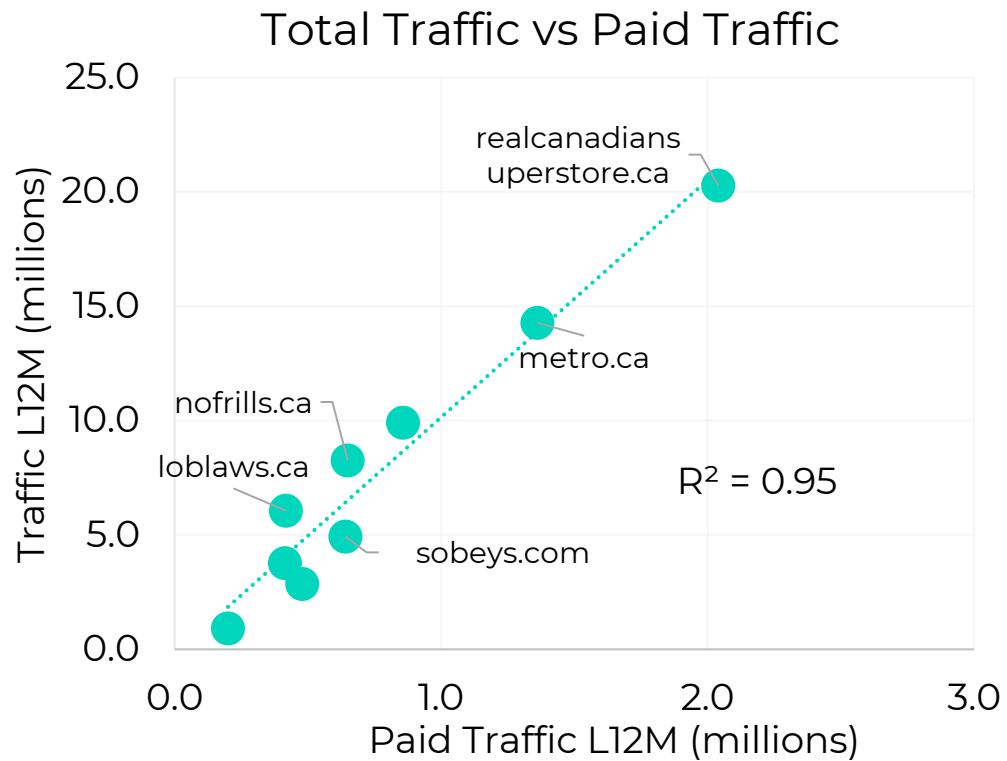


Furniture Stores



Source: Similarweb, November 2020 to October 2021.
Desktop/Laptop only

Grocery Stores



Source: Similarweb, November 2020 to October 2021.
Desktop/Laptop only

“The concern is that the vast dollars of global marketing spend are being spent by non-marketers who view marketing as a parody of classical economics: that brands don’t matter; consumer choice is rational; we work with perfect information; consumers maximize utility; and everything is rationally evaluated.”

Les Binet

Adam&EveDDB’s Head of Effectiveness



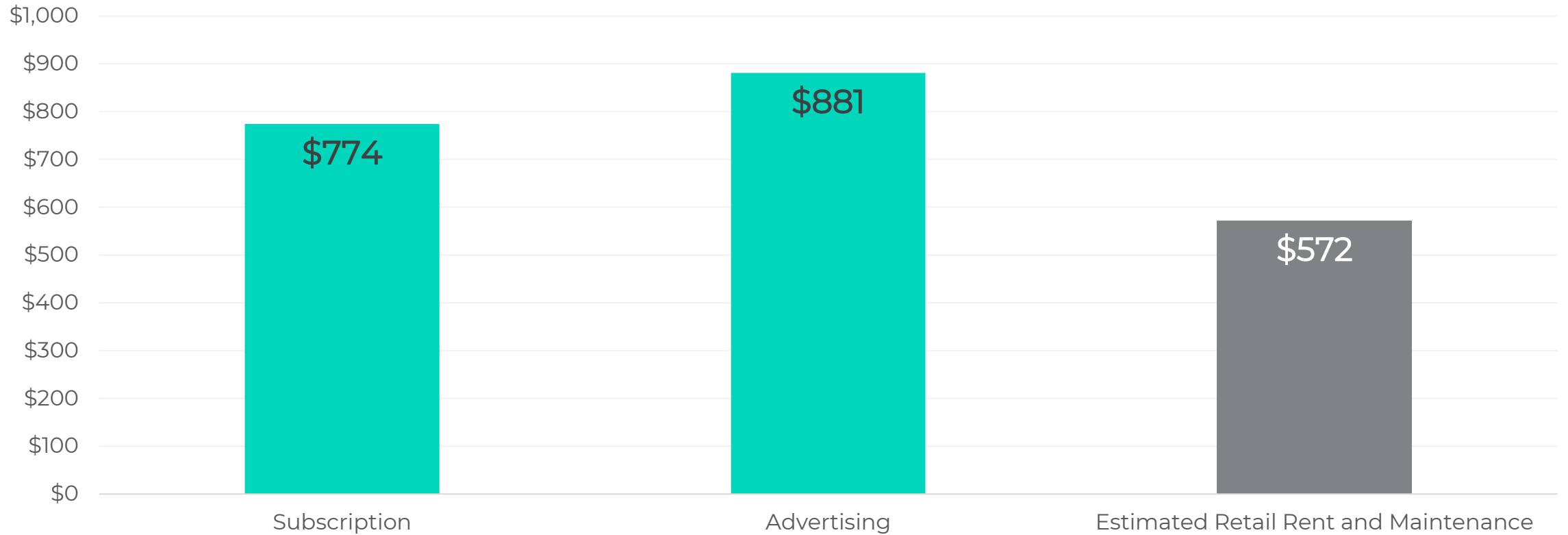
**Mental
Availability**

**Digital
Availability**

**Physical
Availability**

Winning Digital Availability may require shifting 'physical rent' into 'digital rent'

Estimated Annual 'Total Cost per Household'





Purpose Pervasion

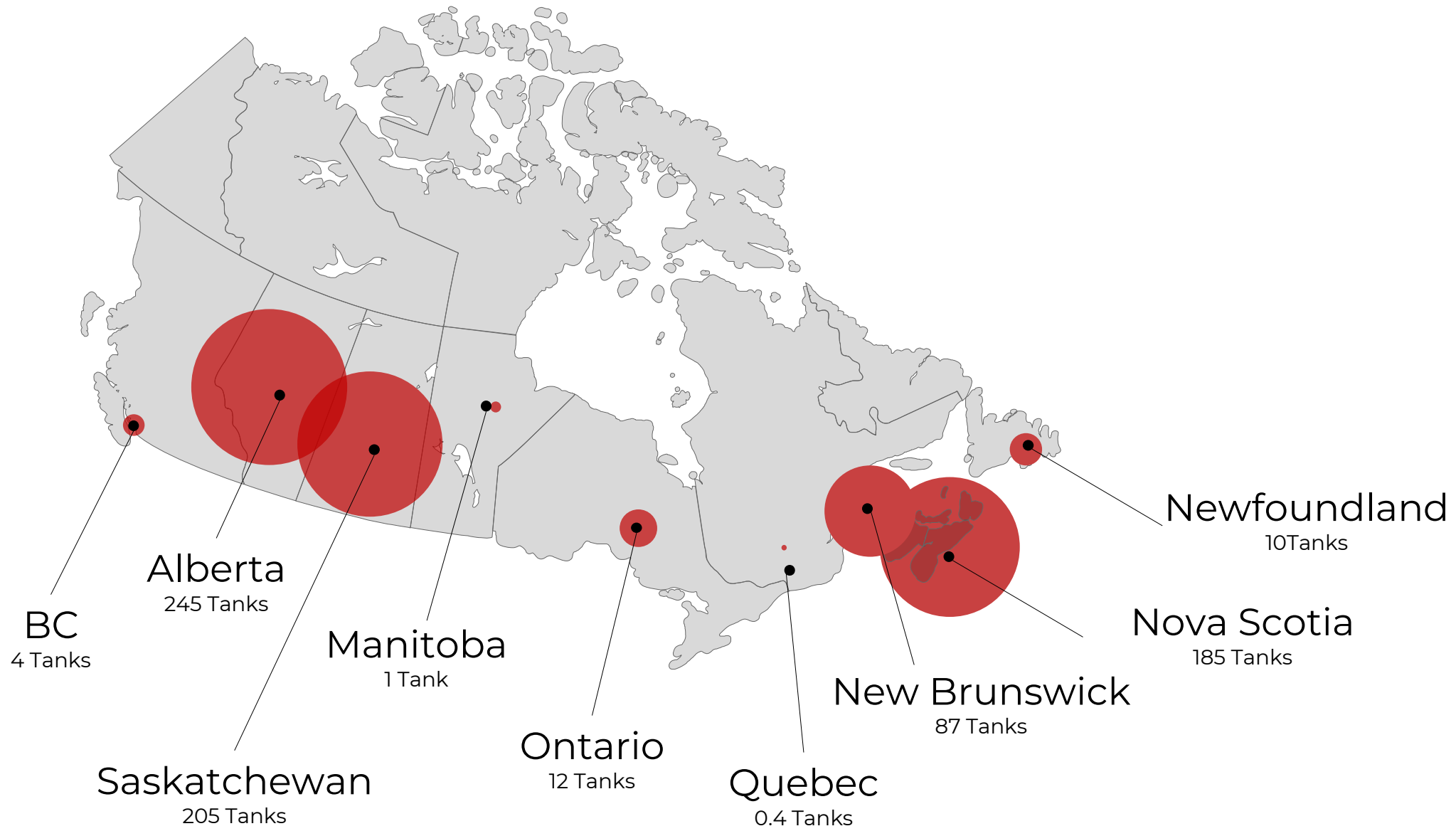
Estimated Carbon Footprint of 10 million:

Video Impressions = ~47 tanks



Display Impressions = ~9 tanks





28%

of emissions in the
UK from advertising-
created demand



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Reporting is more important than ever to marketers...

Digital media is key to website traffic...

Digital spend is up...

...but 'standard reporting' is less complete than before

...but some of it may be more like rent than advertising.

...and it likely needs to go higher

A person in a dark jacket and hat stands on a rocky outcrop, looking out at a vast, starry night sky. The sky is a deep blue and purple, filled with numerous bright stars and a soft, glowing nebula. The overall mood is contemplative and serene.

CMUST

2021

Canadian Media Usage Study 2021

30 November 2021

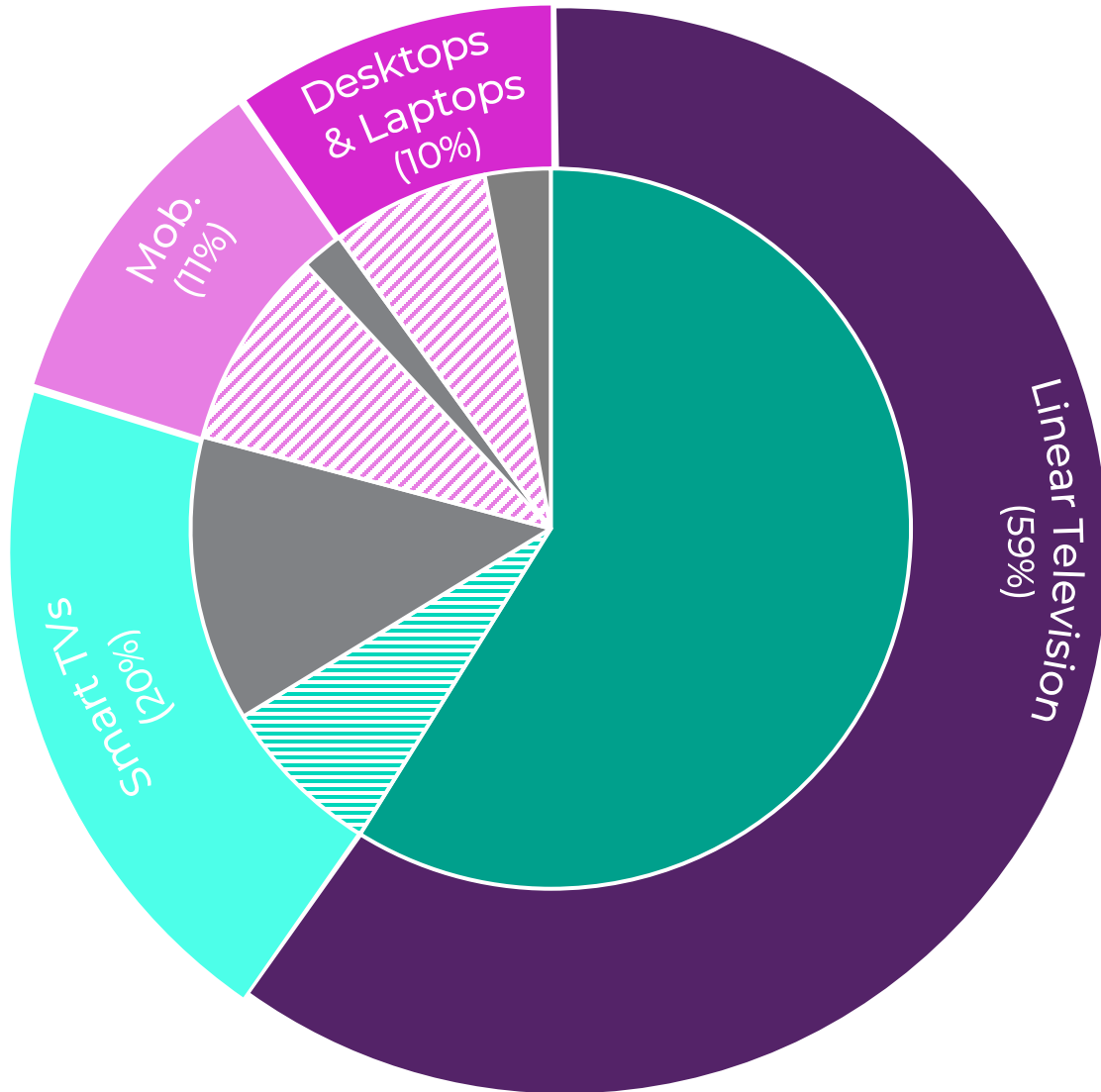
phd

Sources

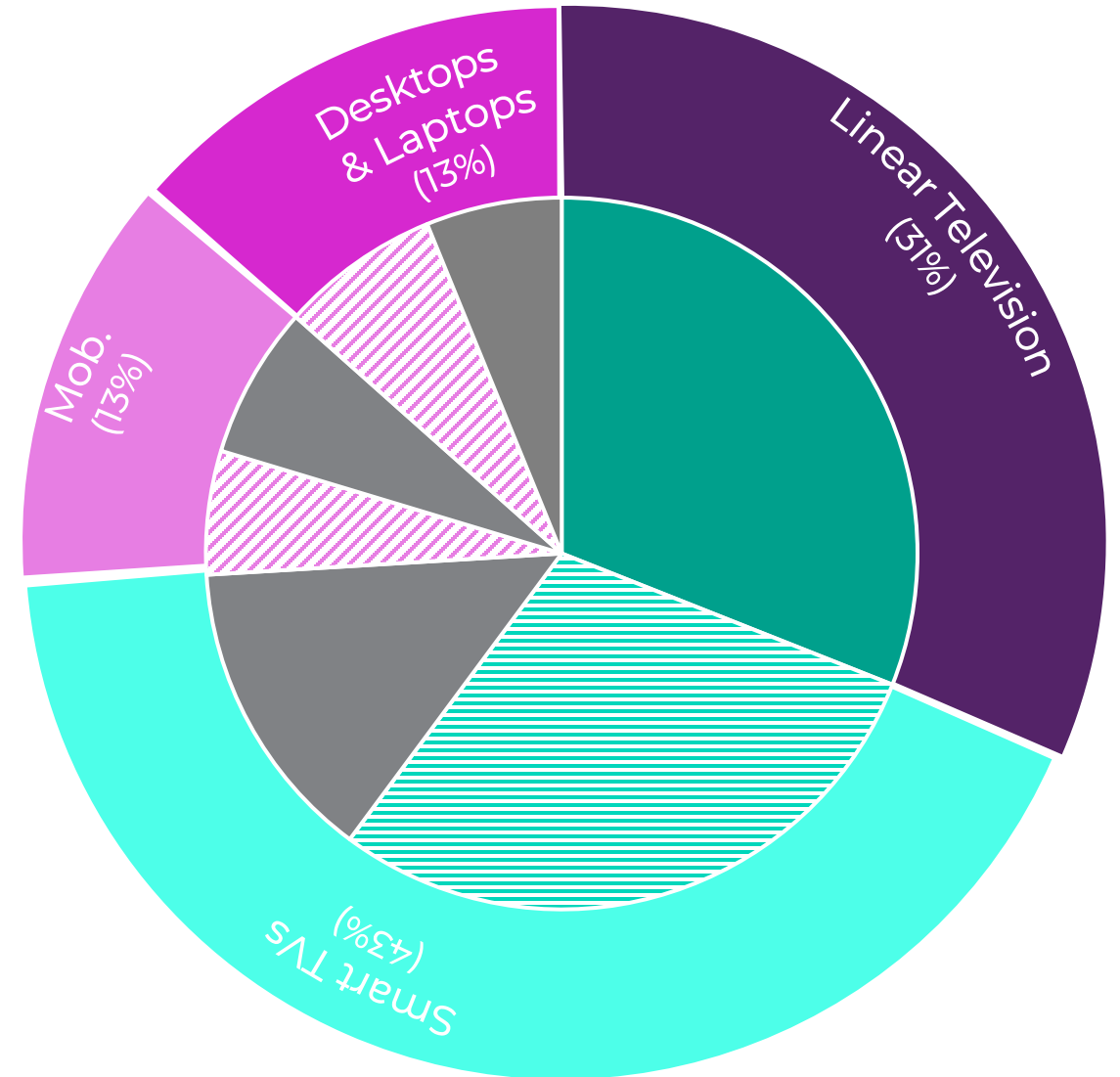
Device penetration	MTM Fall 2020/ Spring 2021 unless indicated otherwise as PHD estimated.
TV weekly time/reach, 2020	Numeris, Fall'20/Spring'21 PPM averaged.
Radio weekly time/reach , 2020	Numeris, Fall'20, Diary
Internet weekly time/reach , 2020	Vividata Spring 2021
Magazine weekly time/reach , 2020	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.
Streamed music weekly time/reach	MTM Fall 2020/Spring 2021, reduced by PHD estimate of respondent over claim.
Video Reach/Time	MTM Fall2020/Spring 2021, Vividata Metrica, PHD estimates, Numeris PPM
Share of Video Time	Numeris PPM TV, VAM, PHD estimates from multiple industry sources, Vividata Metrica
Momentum	Compiled from sources used throughout document
Share of Ad Spend	Think TV compilation from multiple sources, IAB Canada Revenue Report, PHD estimates
eCommerce sales	Statistics Canada Table 20-10-0065-01 Retail trade, total sales and e-commerce sales
	Time spent as summarized in CMUST 2020

Share of Video Time

A18+



A18-34





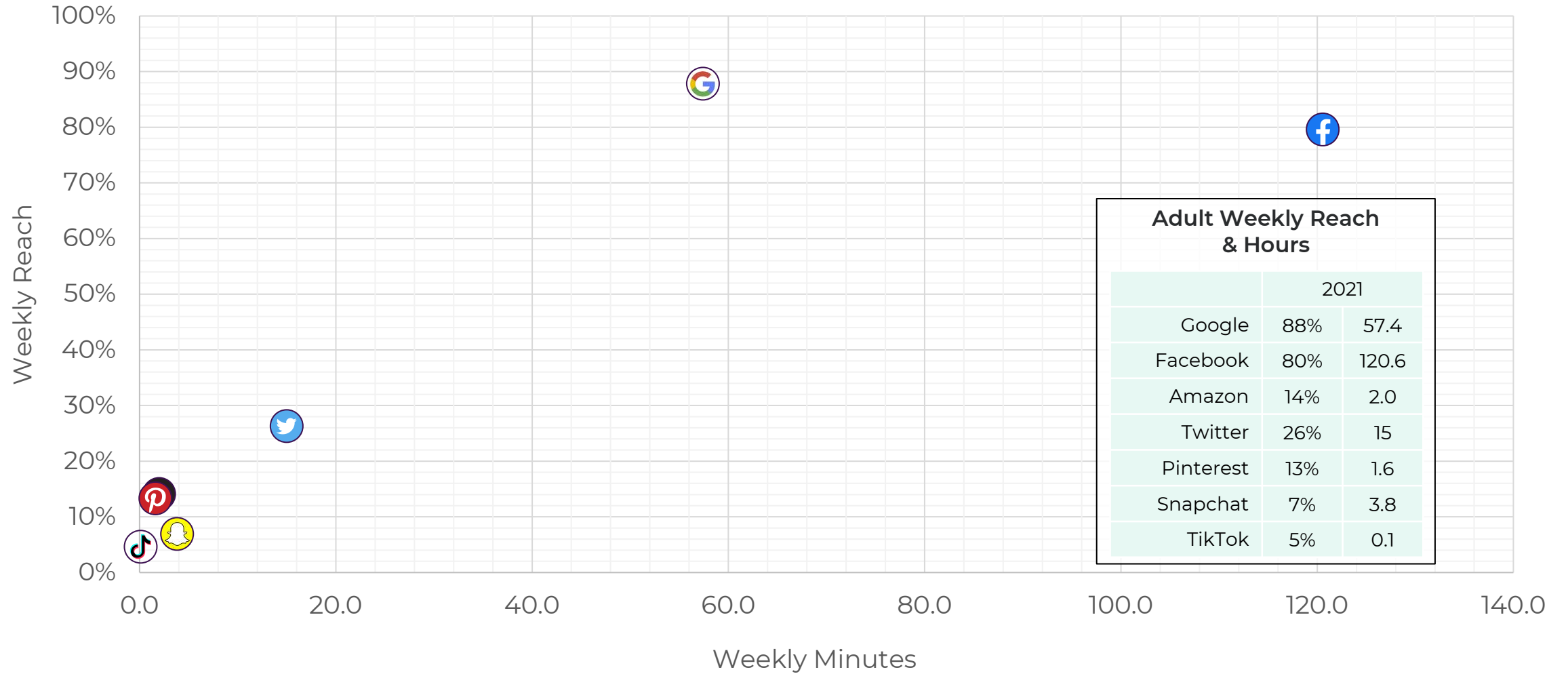
The background image cannot be pasted straight onto the slide otherwise some elements will not appear.

To add the background image:

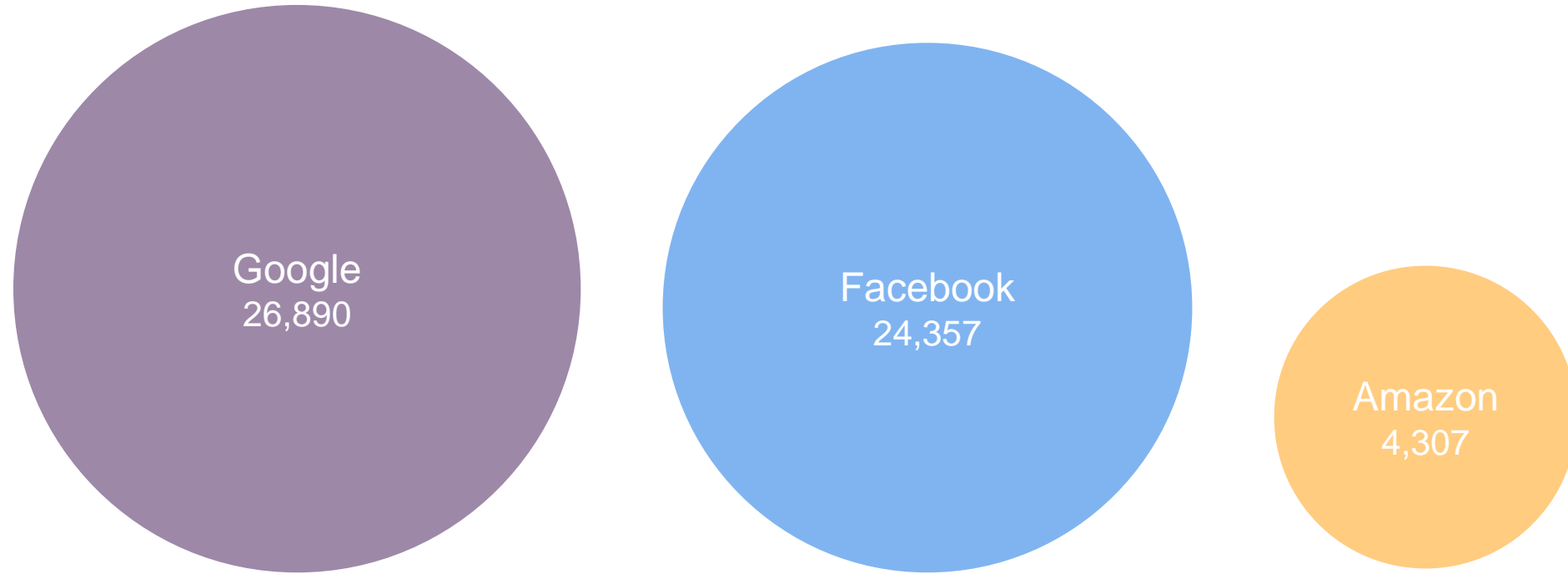
- Right click to activate the menu
- Select {Format Background}
- A dialogue box will appear
- Click the option {Picture or texture fill}
- Select {Insert from file}
- Locate the image and click {Insert}

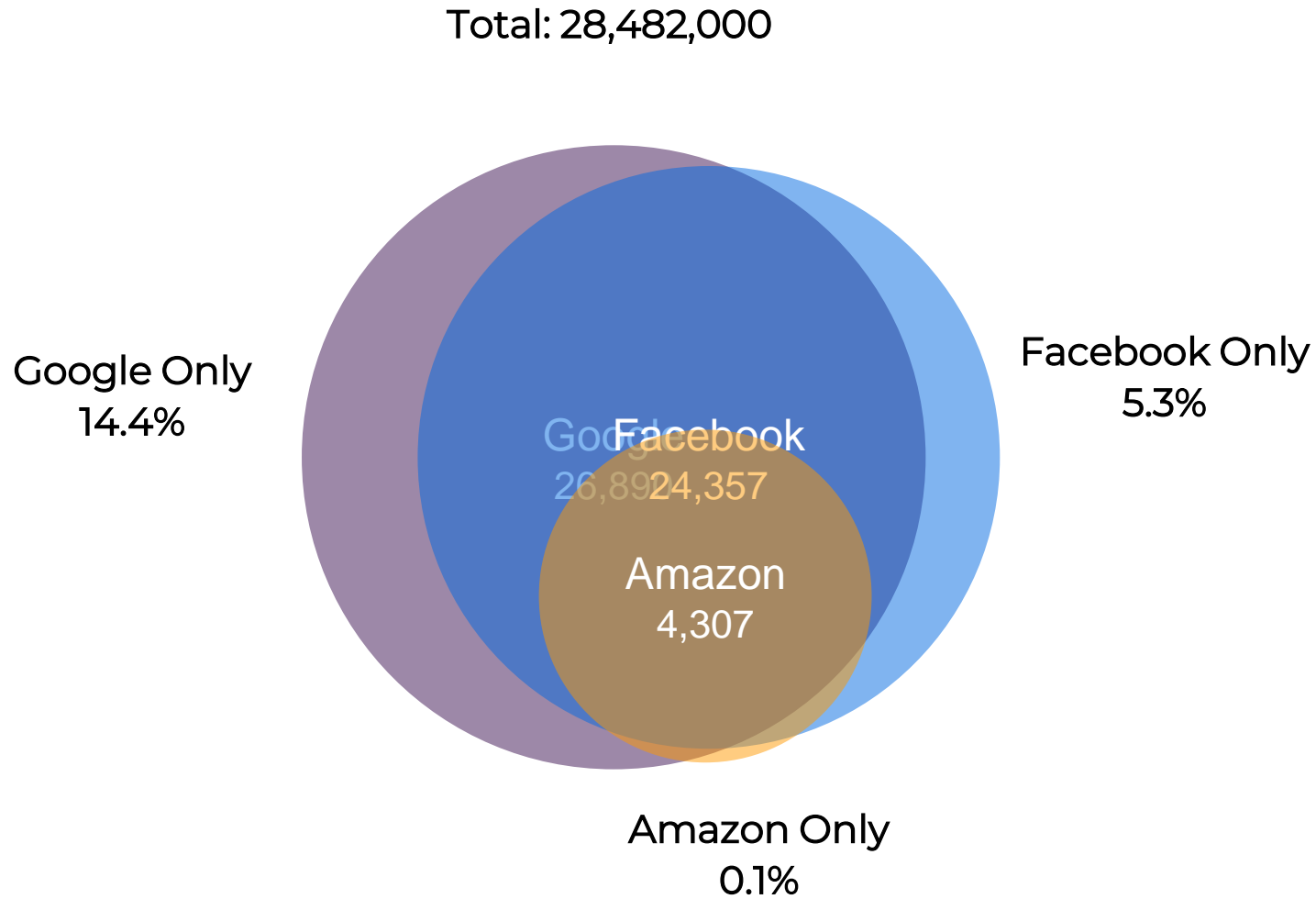
phd

[End slide: v3] <Message>



Source: Vividata Metrica Summer 2021, A18+





Total	28,482
Total GOOGLE	26,890
Total FB	24,357
Total Amamzon	4,307
Amazon AND FB AND Google	3,896
Amazon AND FB	3,955
Google AND FB	22,800
Google AND Amazon	4,213
Amazon only	35
Google Only	4,090
Facebook Only	1,498