



Canadian
Media
Usage
STudy

2020



Matt
Devlin



JF
Bourdeau



Juliane
Baraldi



Ariane
Gelinas



Oliver
Statham



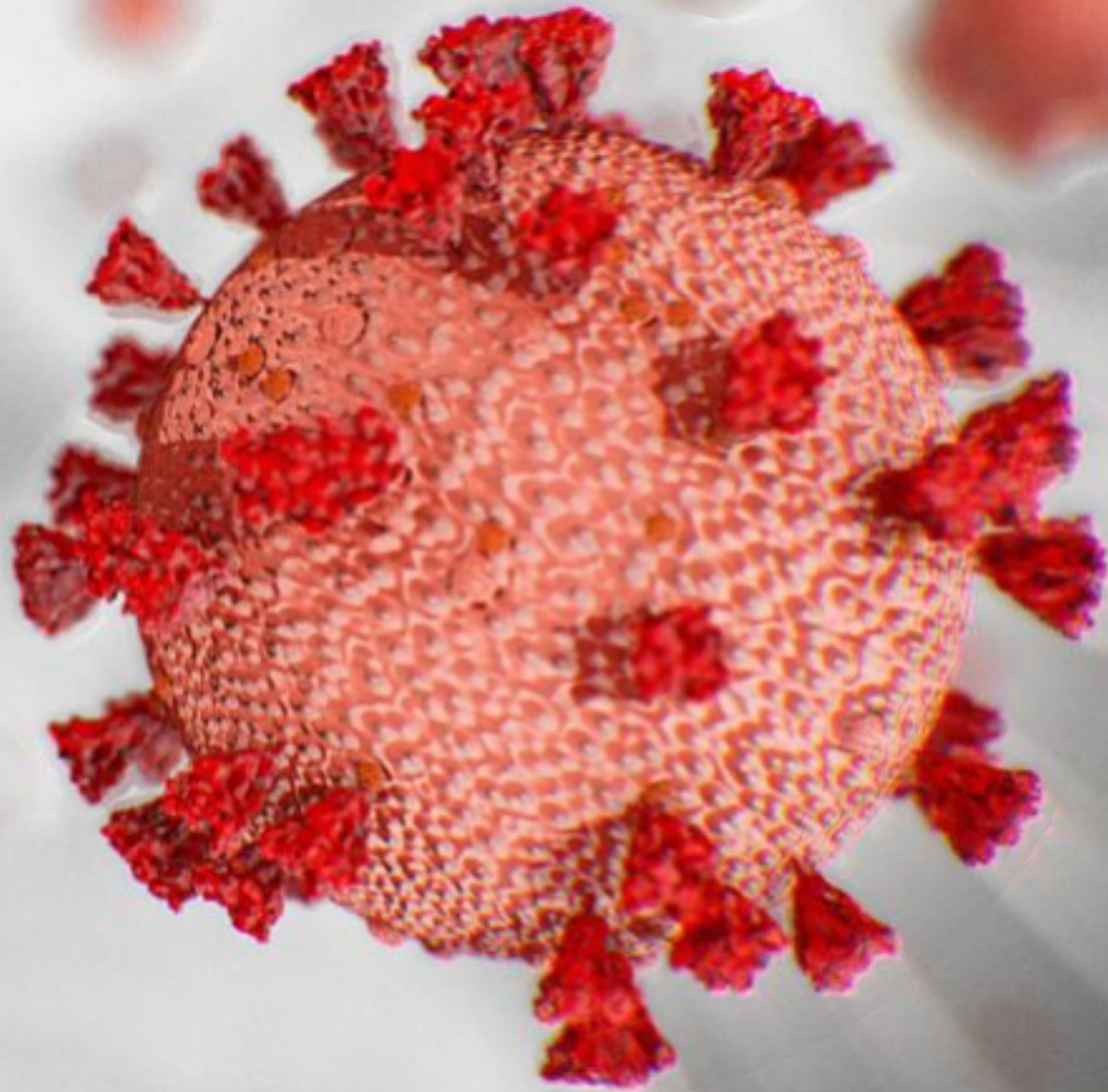
Min
Park

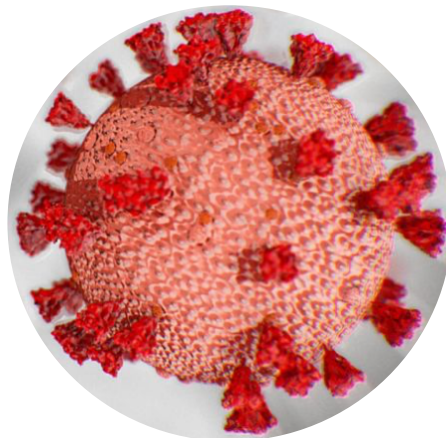




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Media
Usage
STudy

2020



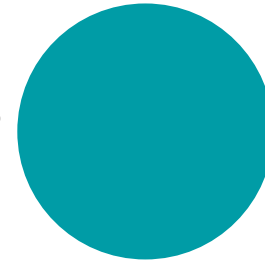
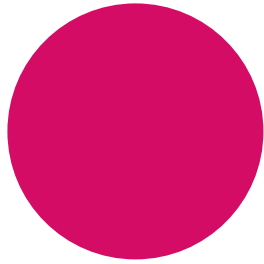


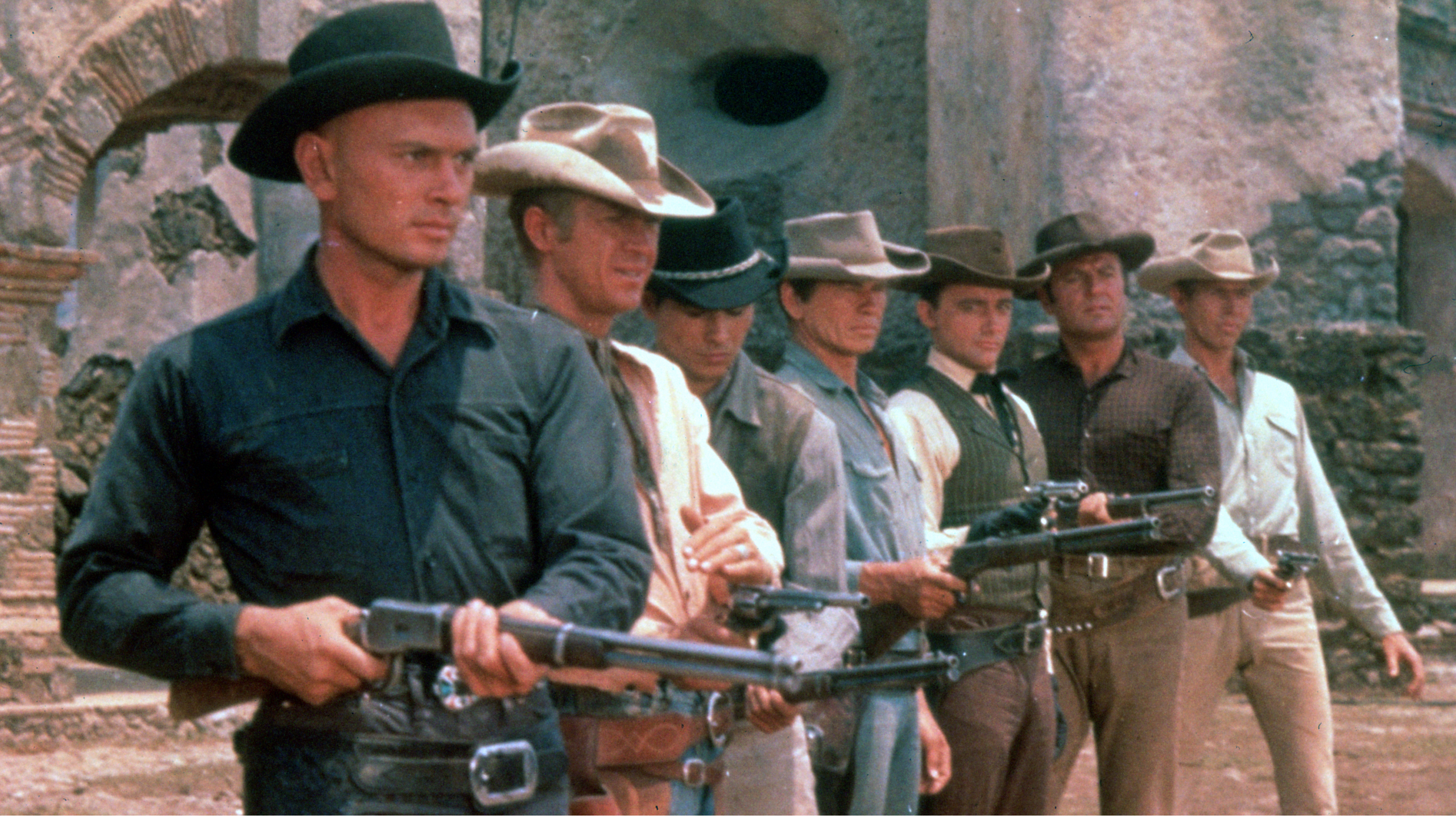




Classical Plot

Shane, 1953

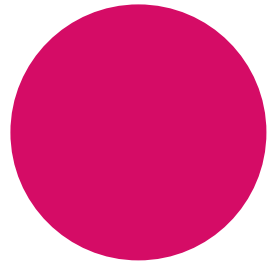






Classical Plot

Shane, 1953



Lone Hero, 'lowly' status

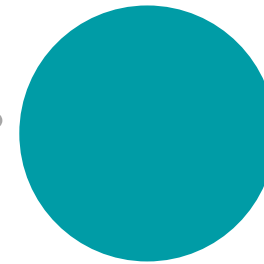
Protects the community

Morally good



Professional Plot

Magnificent Seven,
1960



Team of experts

Compete with the villains

Morally ambivalent





**We need popular content
more than we realize**



**Knowing what is popular
matters**



**Content that connects with
culture is profitable**



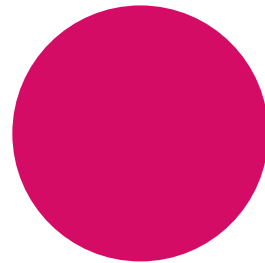
- Reach & Time
- Devices
- Video
- Audio
- eCommerce
- Money
- Implications





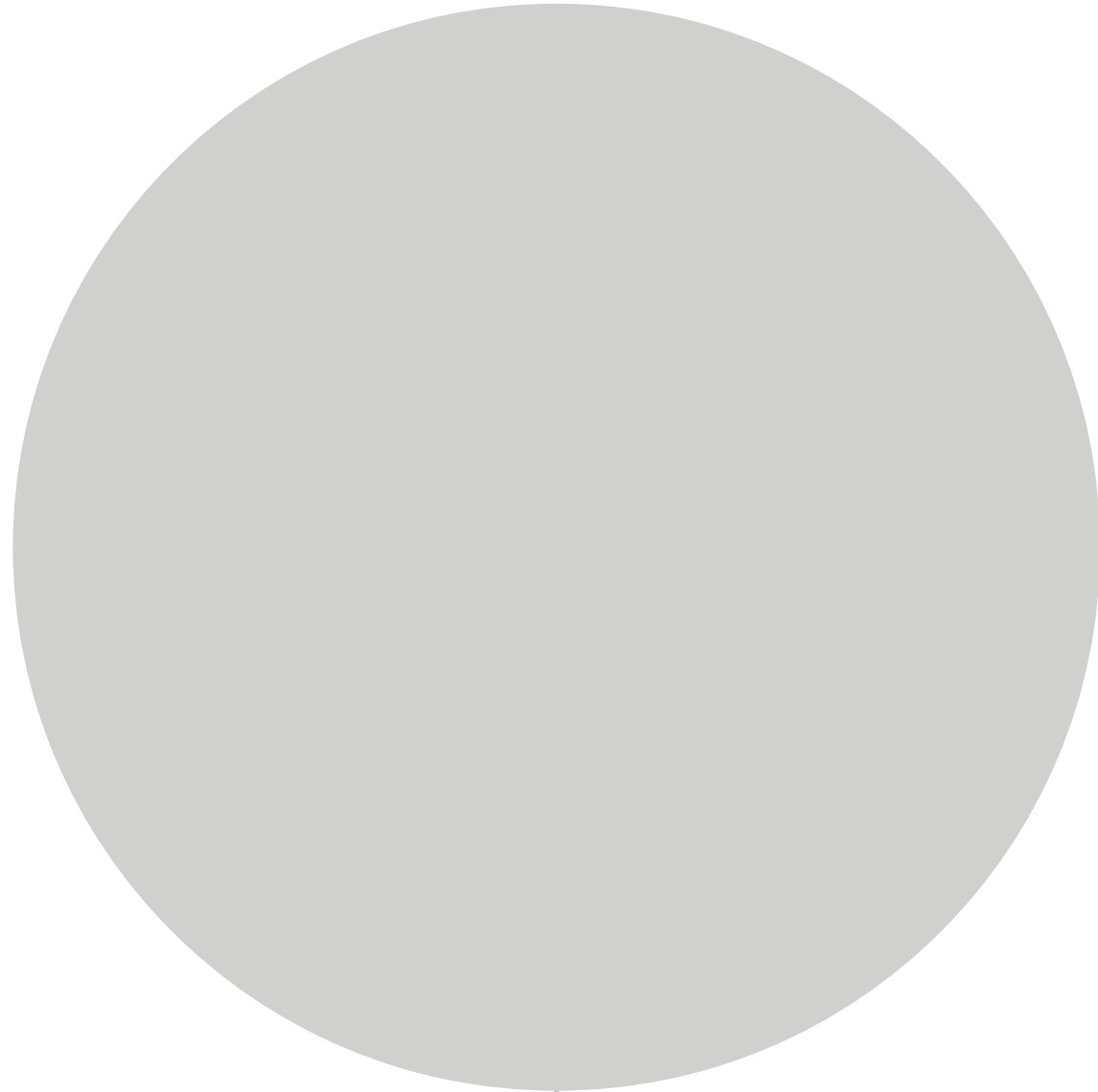
Top Grossing Film in Canada

Avengers: Endgame

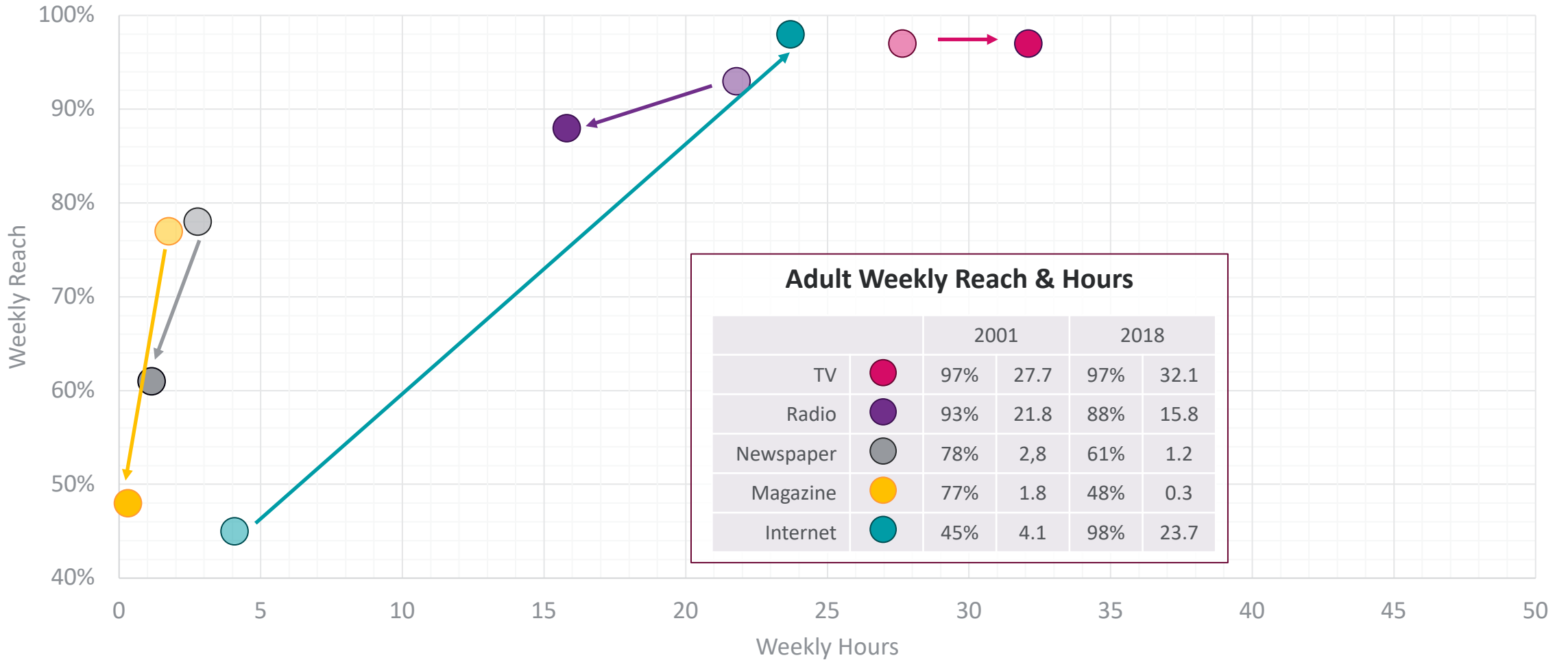




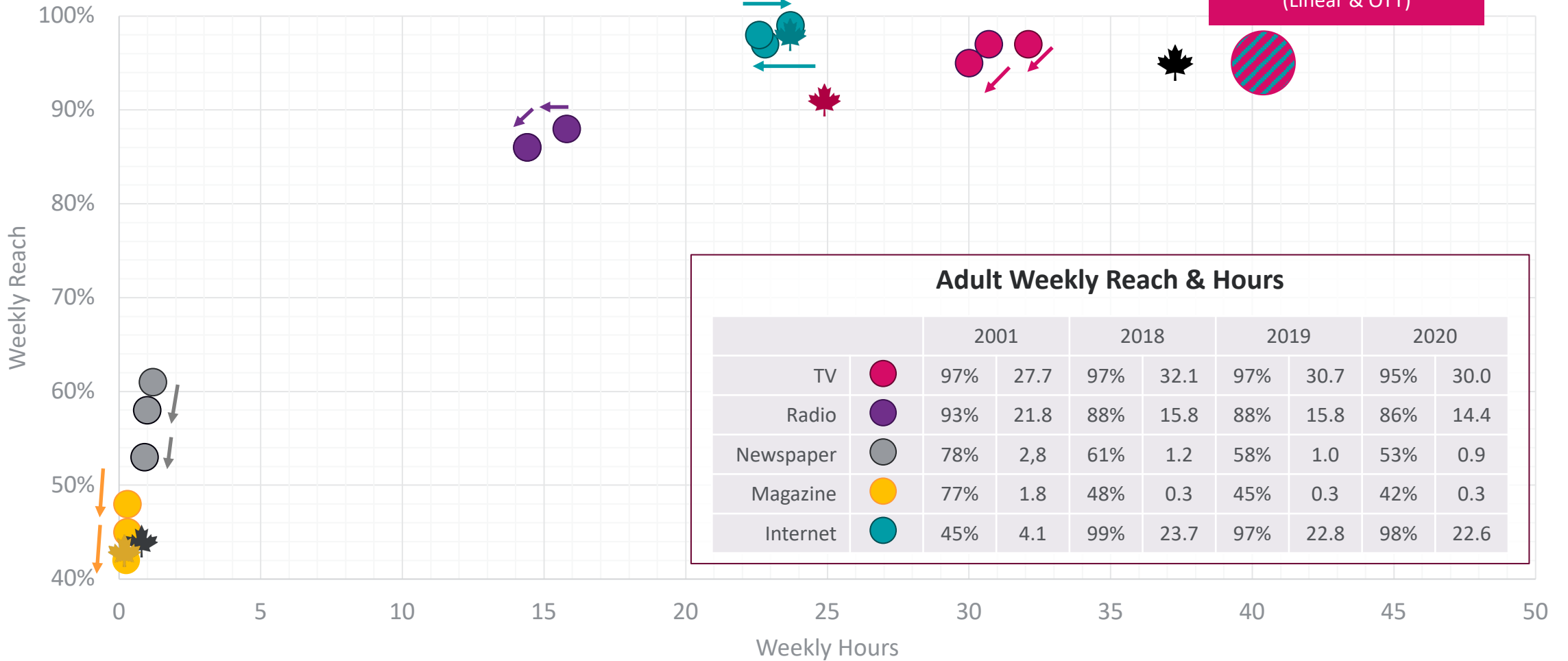
Reach & Time



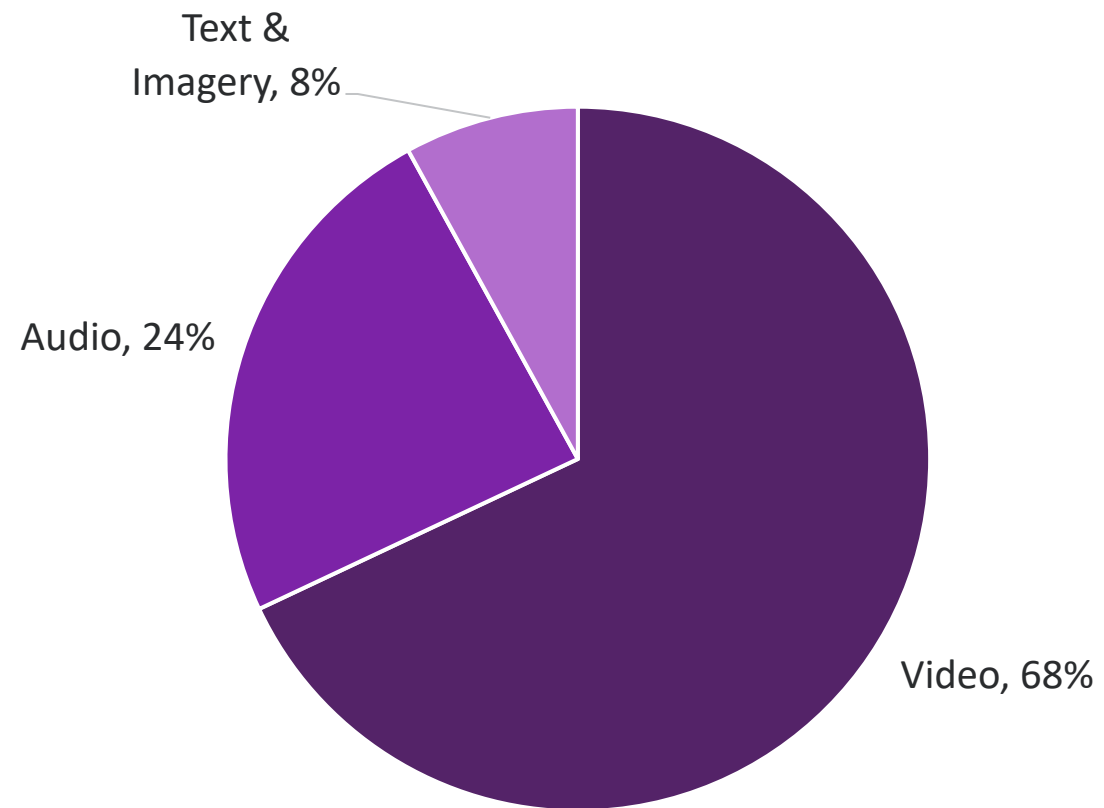
Reach & Time



3 Year Trend

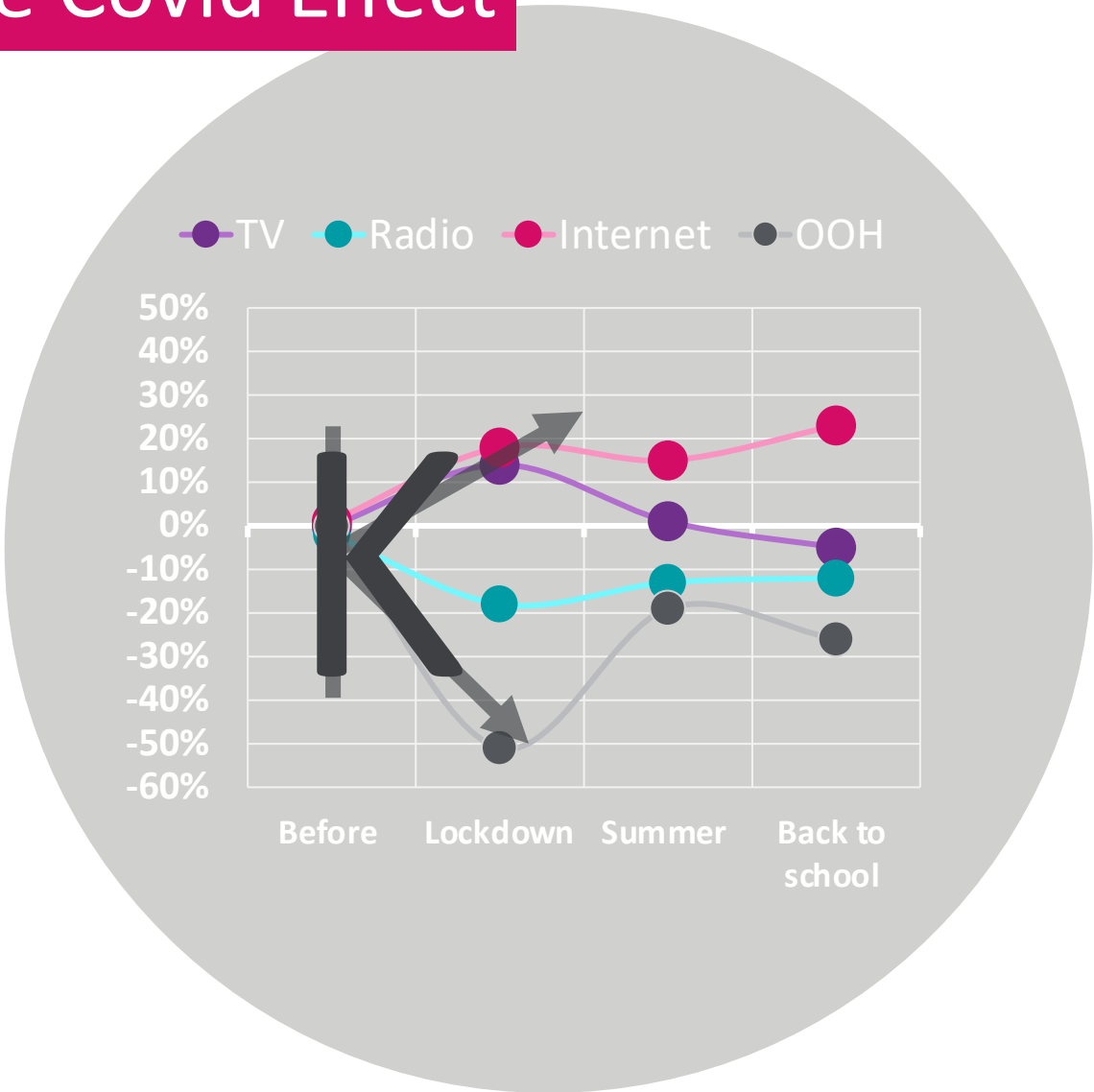


Share of Attention (A18+)







The Covid Effect







Momentum




Upward Momentum

-  **General Internet**
+20% time
-  **Overall TV**
+3% time

Downward Momentum

-  **Overall Radio**
-12% time
-5% reach
-  **Overall OOH**
-26% Traffic

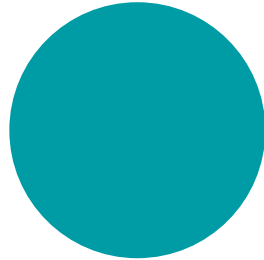
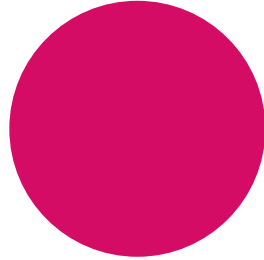


-  Likely a short-term trend
-  Likely a long-term trend
-  Likely to slow but continue





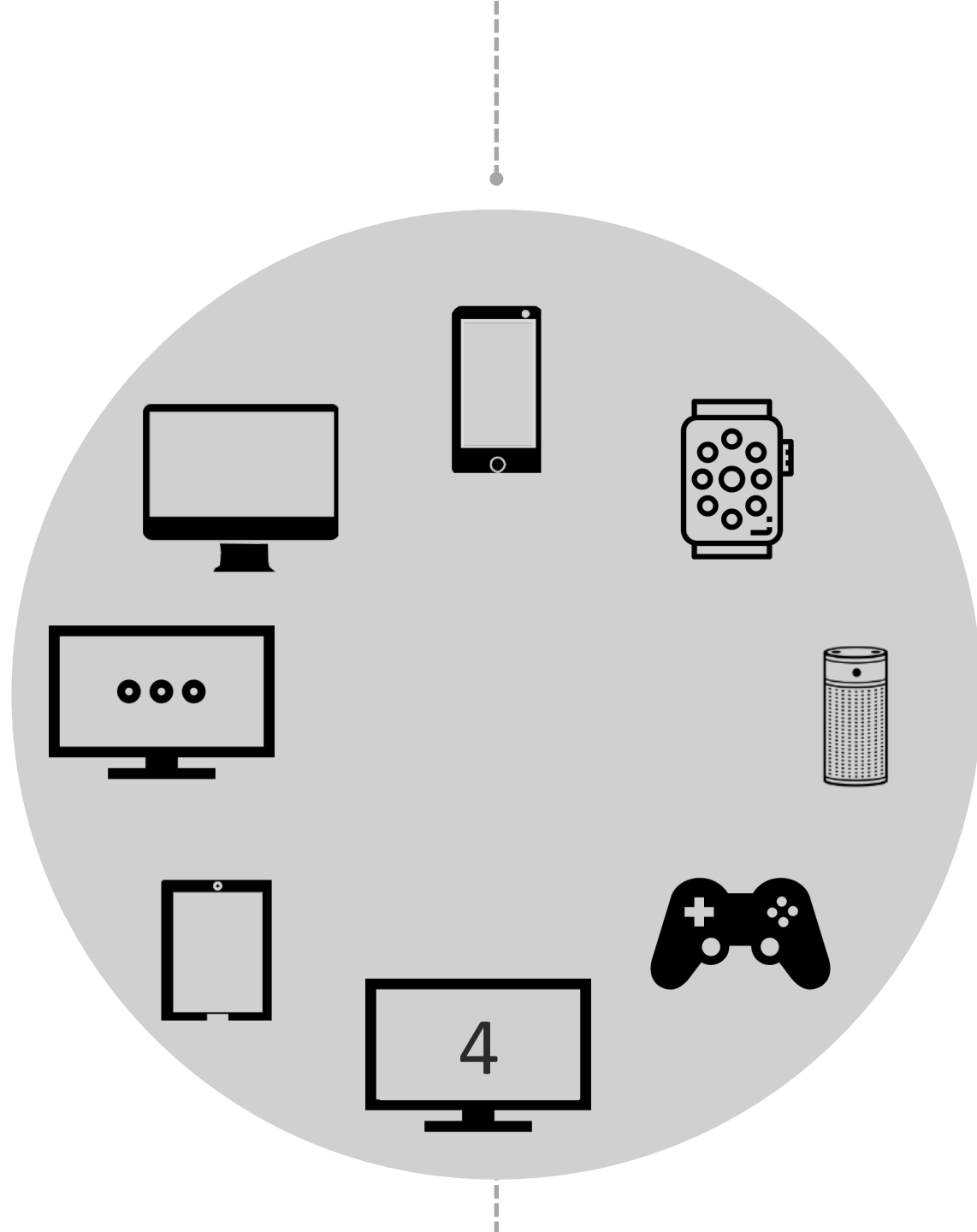
Channel-Disrupting



Election-Buzzing

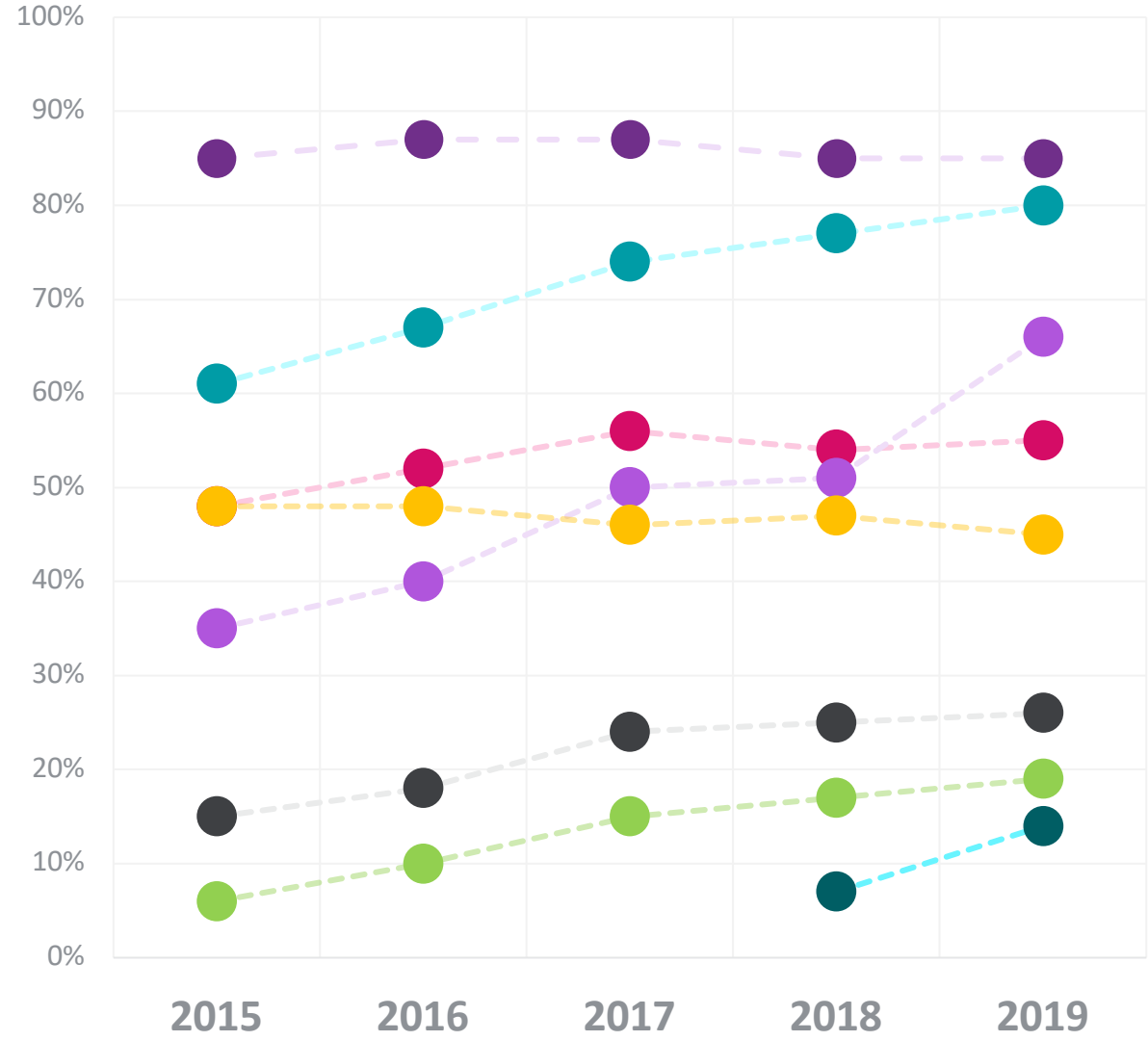


Devices

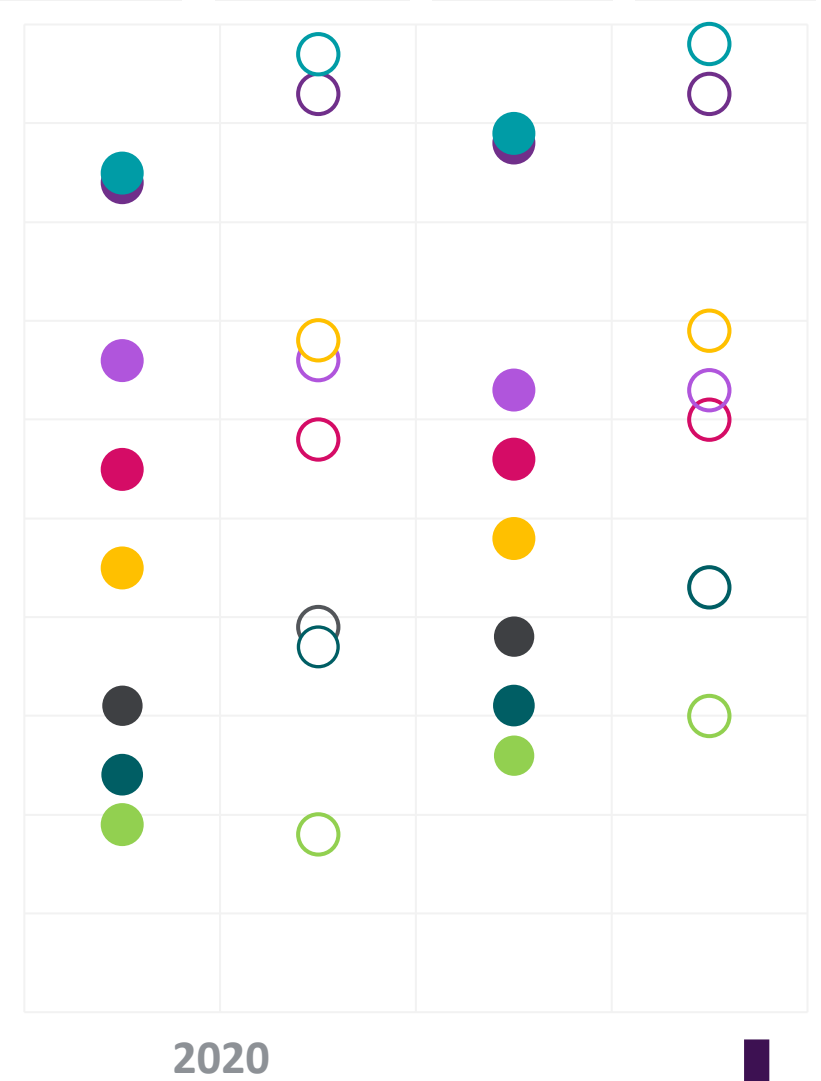




Adults 18+







A18+ 18-34 A18+ A18-34







Momentum




Upward Momentum

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+20% time
-  **Overall TV**
+3% time
-  **Video Gaming**
+19% people increased time¹
-  **Virtual Classrooms**
+17% of households¹

Downward Momentum

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-12% time
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-26% Traffic



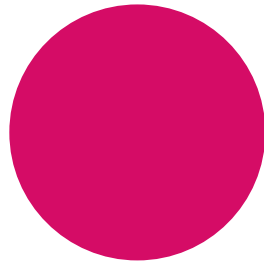
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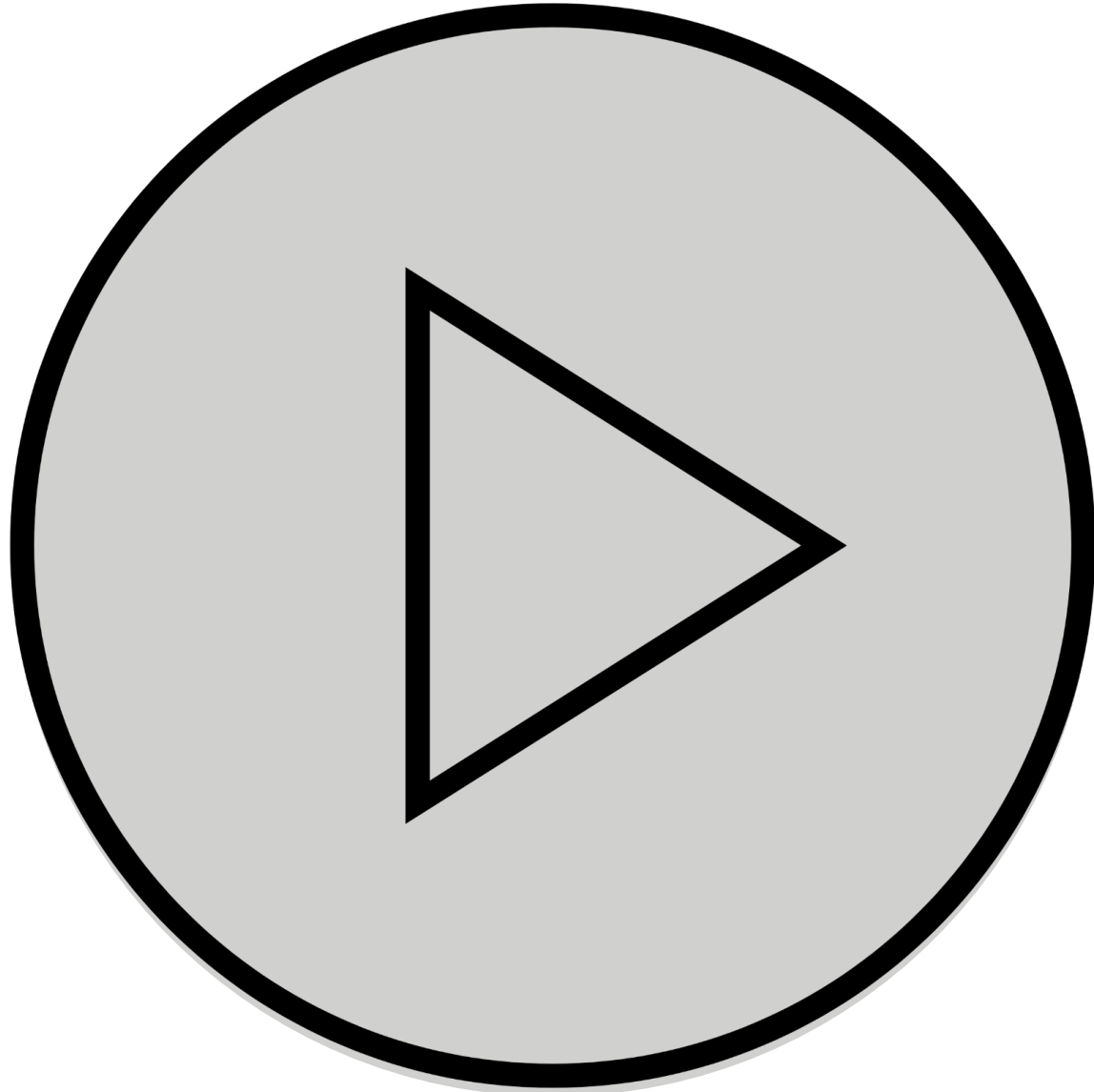
Top Rated Show in Canada

The Masked Singer



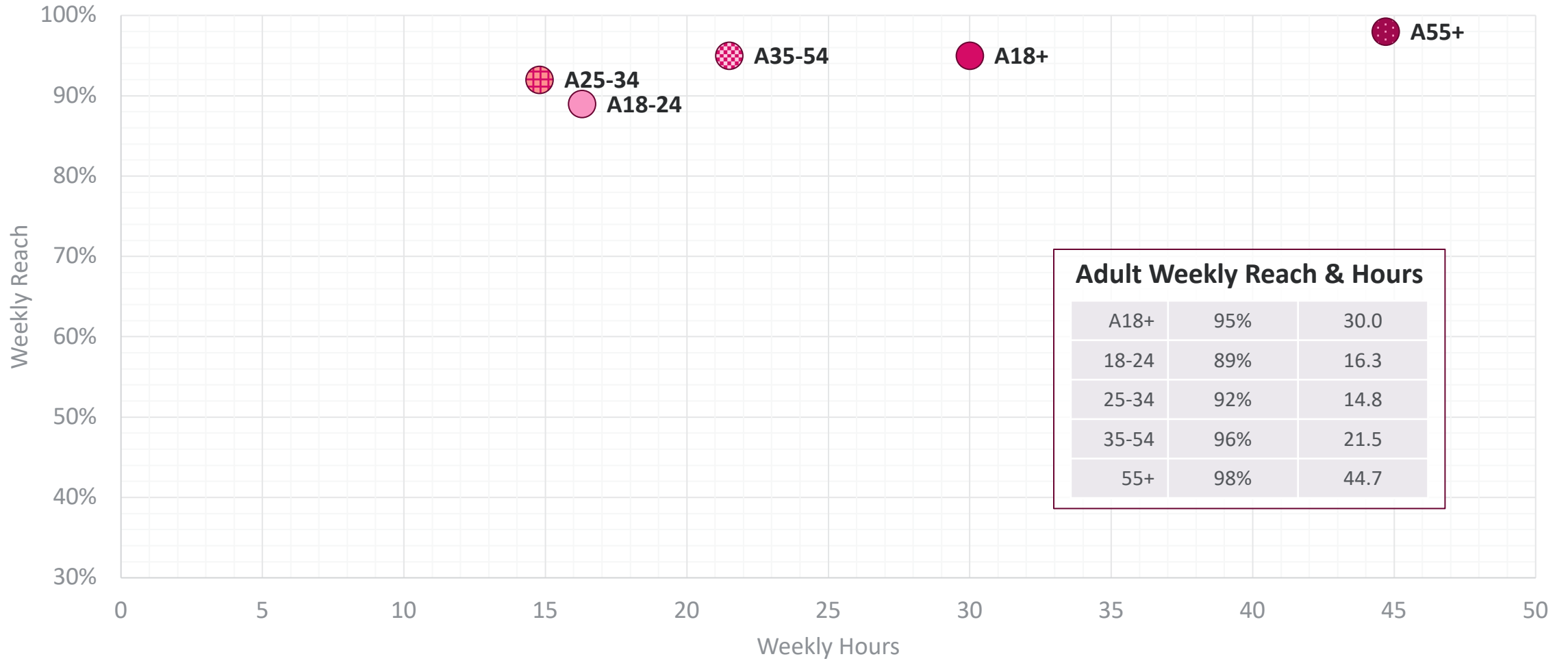


Video





Strong overall numbers – with a heavy skew to older french Canadians

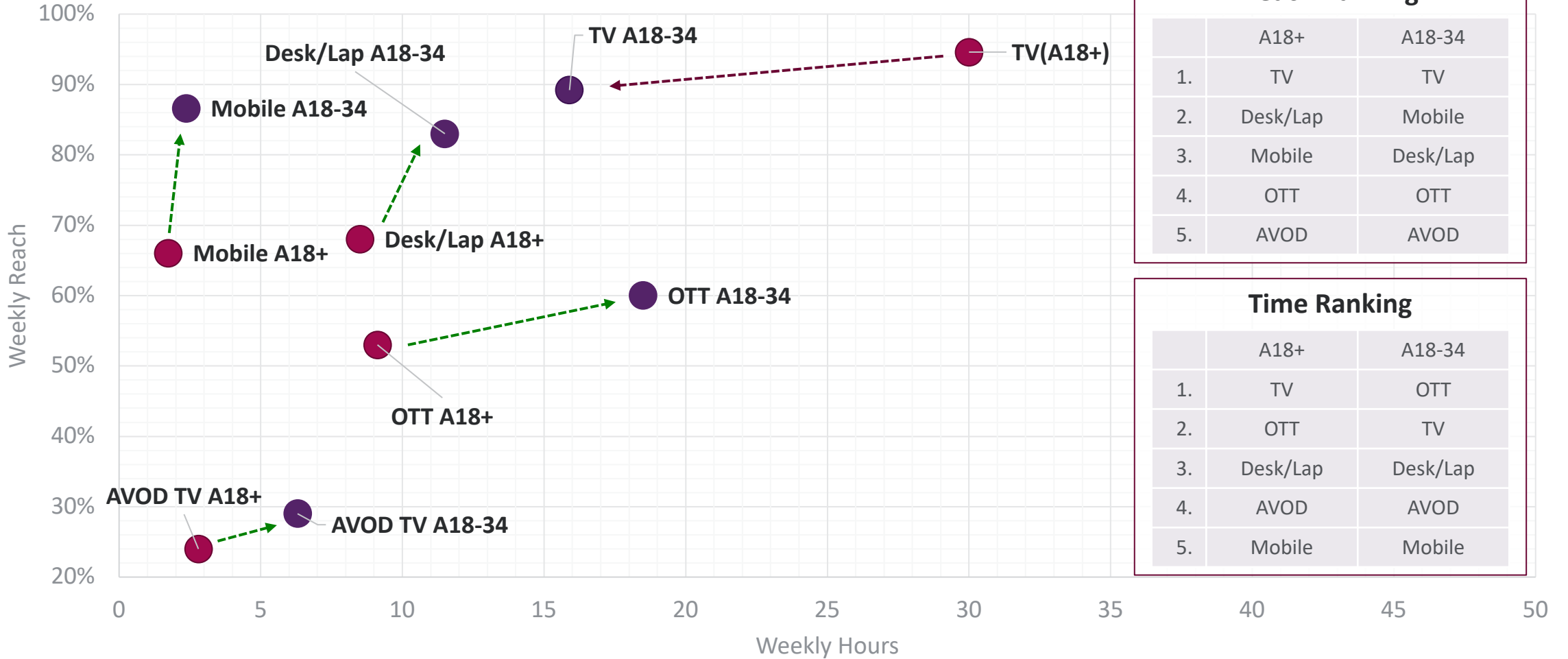


| | | |
|-------|-----|------|
| A18+ | 95% | 30.0 |
| 18-24 | 89% | 16.3 |
| 25-34 | 92% | 14.8 |
| 35-54 | 96% | 21.5 |
| 55+ | 98% | 44.7 |



Video

Younger French Canadians are heavy consumers of digital video in all its forms



Reach Ranking

| | A18+ | A18-34 |
|----|----------|----------|
| 1. | TV | TV |
| 2. | Desk/Lap | Mobile |
| 3. | Mobile | Desk/Lap |
| 4. | OTT | OTT |
| 5. | AVOD | AVOD |

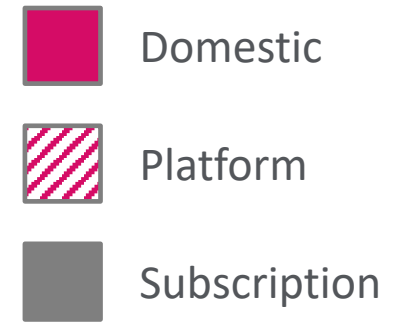
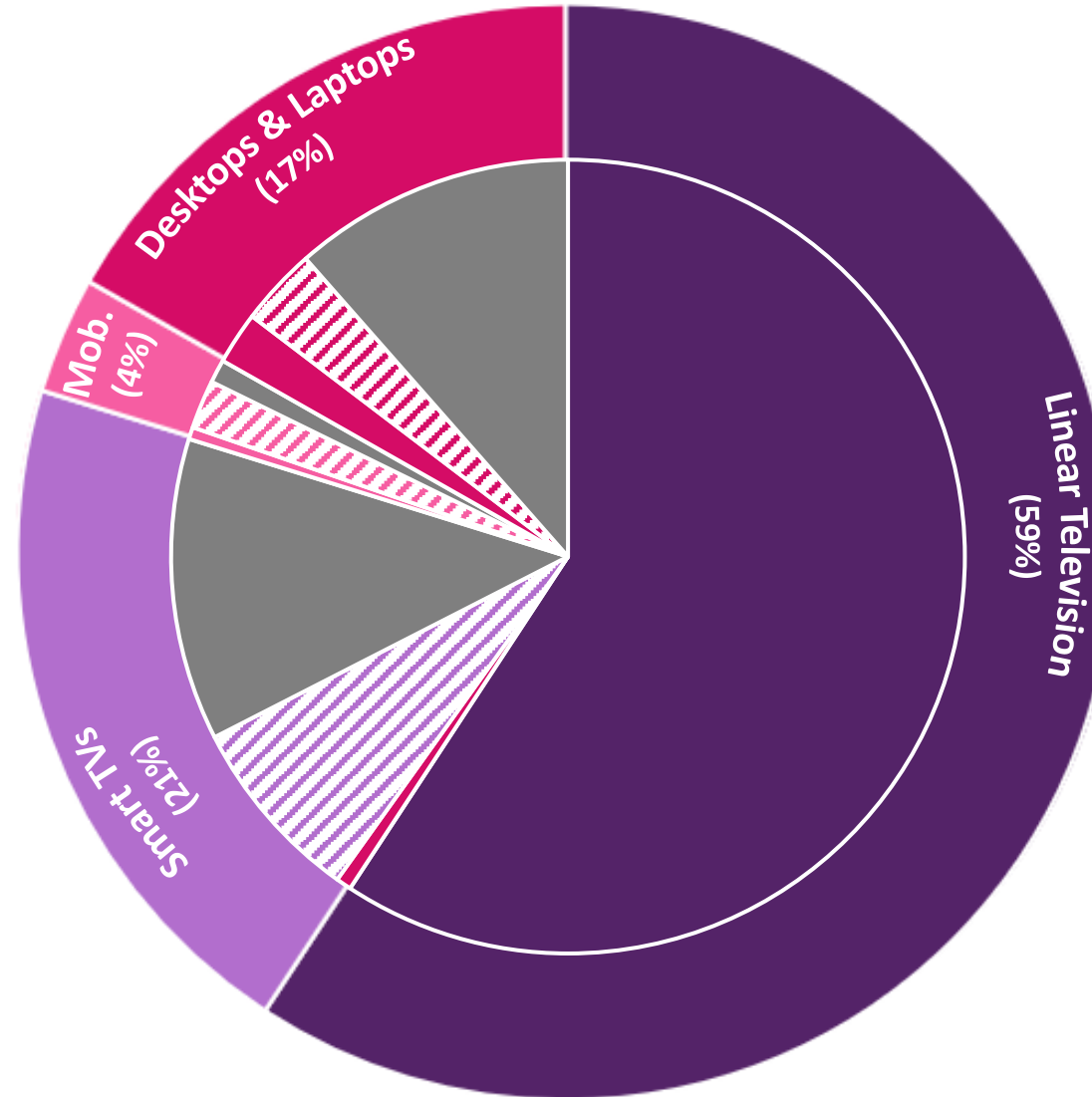
Time Ranking

| | A18+ | A18-34 |
|----|----------|----------|
| 1. | TV | OTT |
| 2. | OTT | TV |
| 3. | Desk/Lap | Desk/Lap |
| 4. | AVOD | AVOD |
| 5. | Mobile | Mobile |

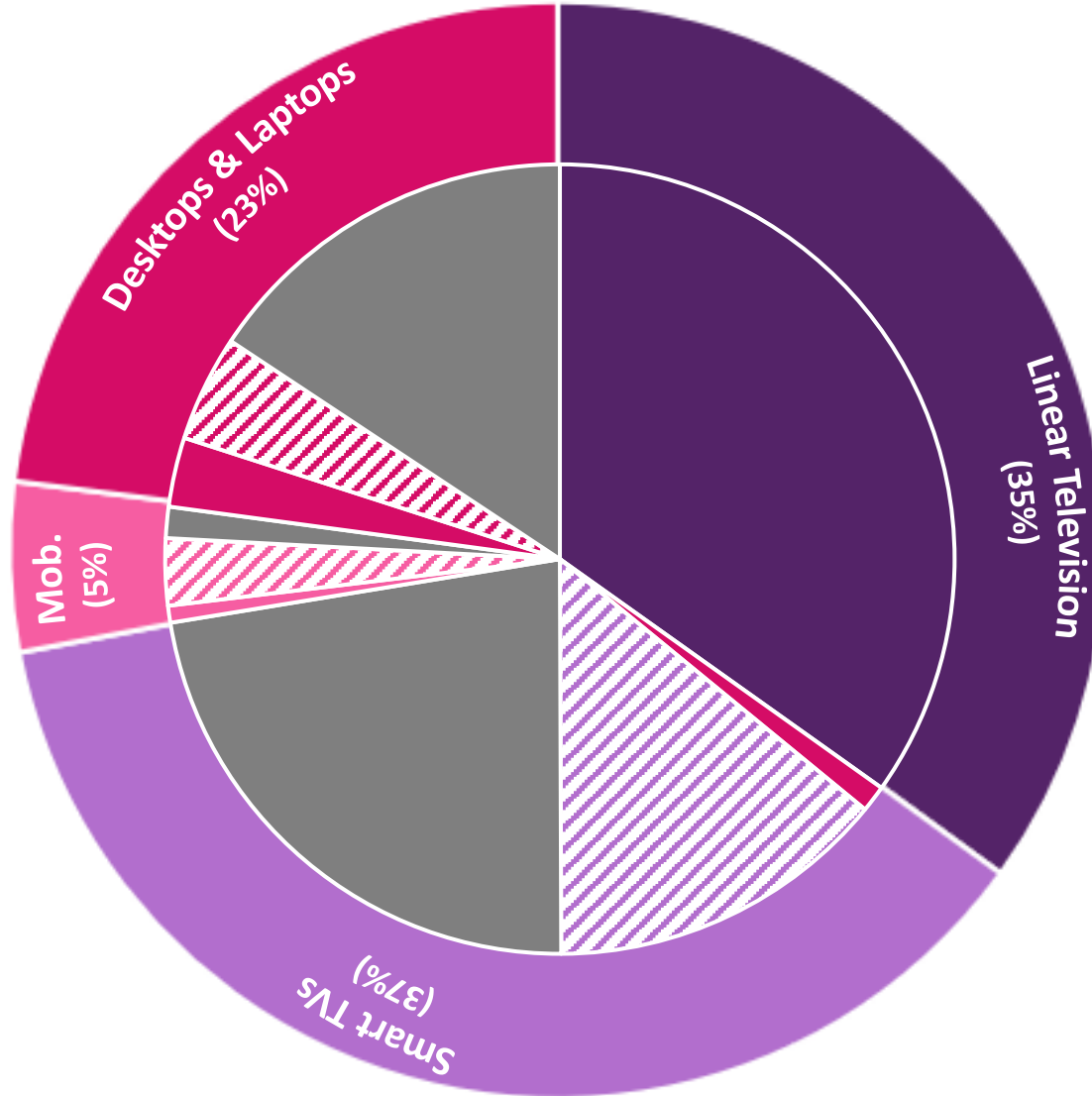
Share of Video Time (A18+)

Estimated Share

| | Total Video | Digital Video |
|-----------|-------------|---------------|
| Ad-Funded | 75% | 39% |
| Domestic | 62% | 8% |

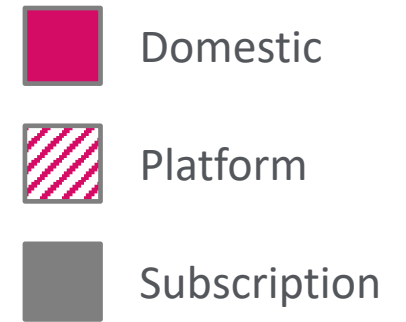


Share of Video Time (A18-34)

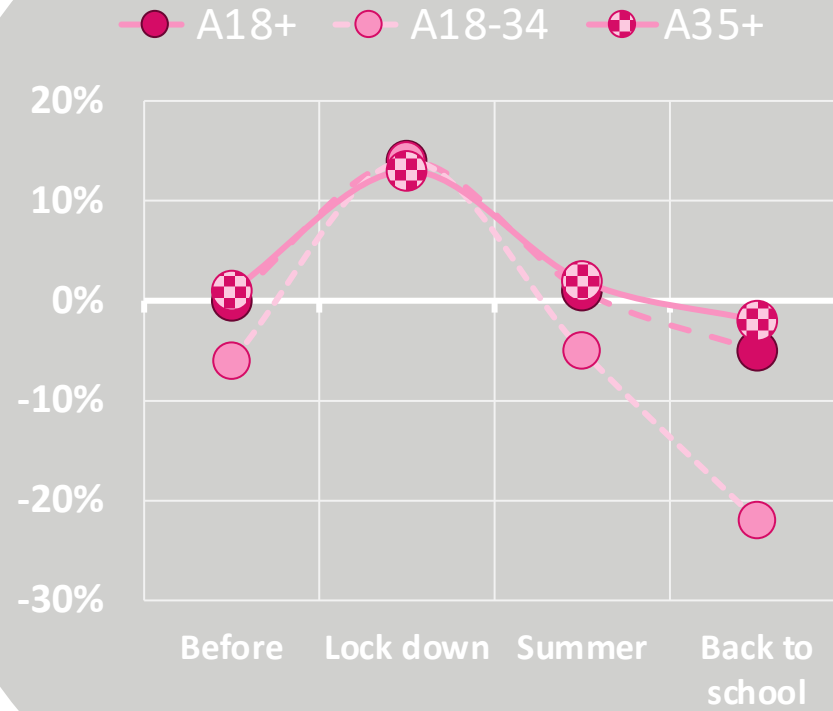


Estimated Share

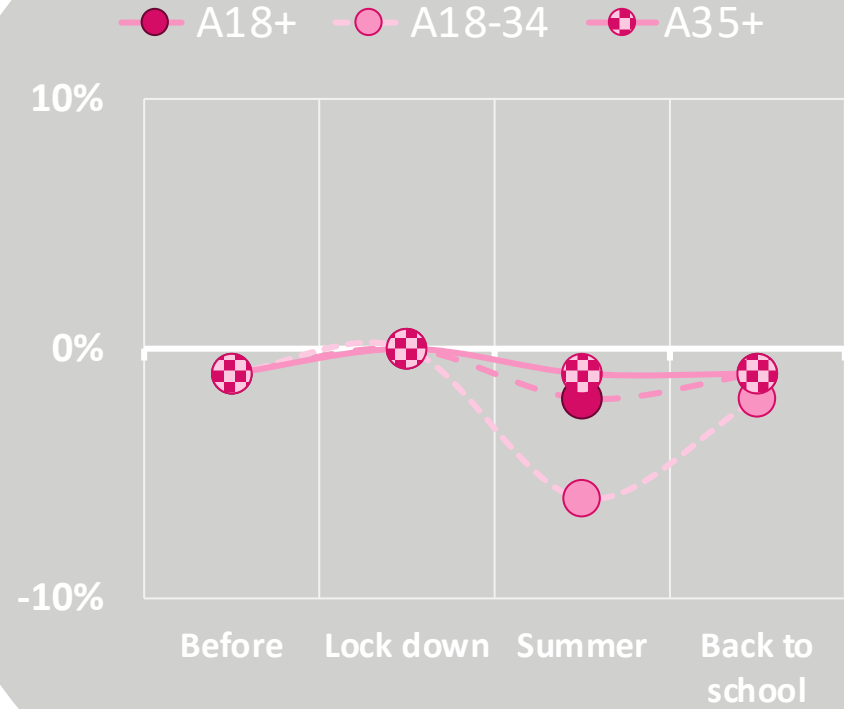
| | Total Video | Digital Video |
|-----------|-------------|---------------|
| Ad-Funded | 61% | 39% |
| Domestic | 39% | 7% |



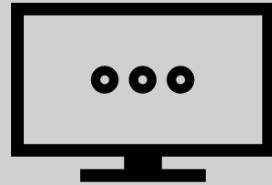
TV Momentum (Time)



TV Momentum (Reach)



Digital Video



+9%

OTT Penetration



+18%*

Streaming visits on
desktop & mobile
(March to October vs 2019)








+182%*

Transactional TV On-
Demand






Momentum




Upward Momentum

-  **General Internet**
+20% time
-  **Overall TV**
+3% time
-  **Video Gaming**
+19% people increased time¹
-  **Virtual Classrooms**
+17% of households¹
-  **TV 35+**
+4% time, -1% reach
-  **OTT**
+9% subs (~1 year of growth)¹
-  **Digital Video**
+18% site visits

Downward Momentum

-  **Overall Radio**
-12% time
-5% reach
-  **Overall OOH**
-26% Traffic
-  **TV A18-34**
-6% time
-3% reach = 2 years of decline



-  Likely a short-term trend
-  Likely a long-term trend
-  Likely to slow but continue





Improving Measurement





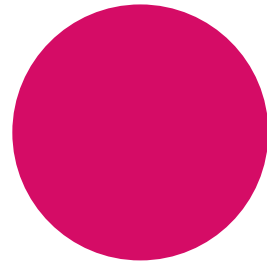
| | |
|-------------|-----------------|
| Content | Popularity |
| | Broad Audience |
| | Custom Audience |
| | Open |
| Advertising | Delivery |
| | Broad Audience |
| | Custom Audience |
| | Competitor |
| | Effects |

| Numeris VAM – Cross Platform Video Content | | Vividata Metrica - Digital content with rich survey | |
|-----------------------------------------------|----------|--------------------------------------------------------|--------|
| TV | Smart TV | Desktop | Mobile |
| | | | |
| | | | |
| | | | |
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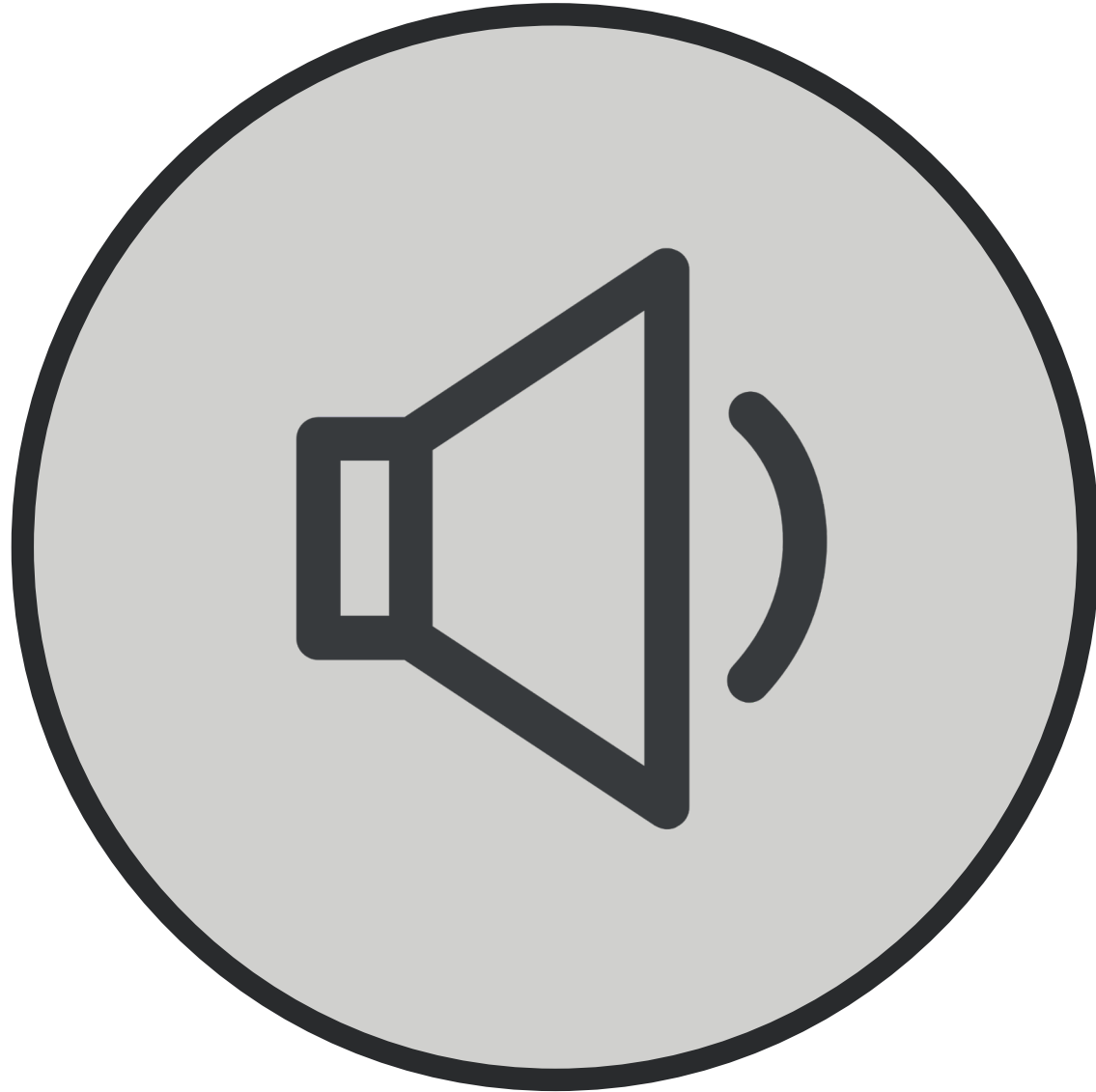
Top Canadian Song in Canada?

The Weeknd: Blinding Lights



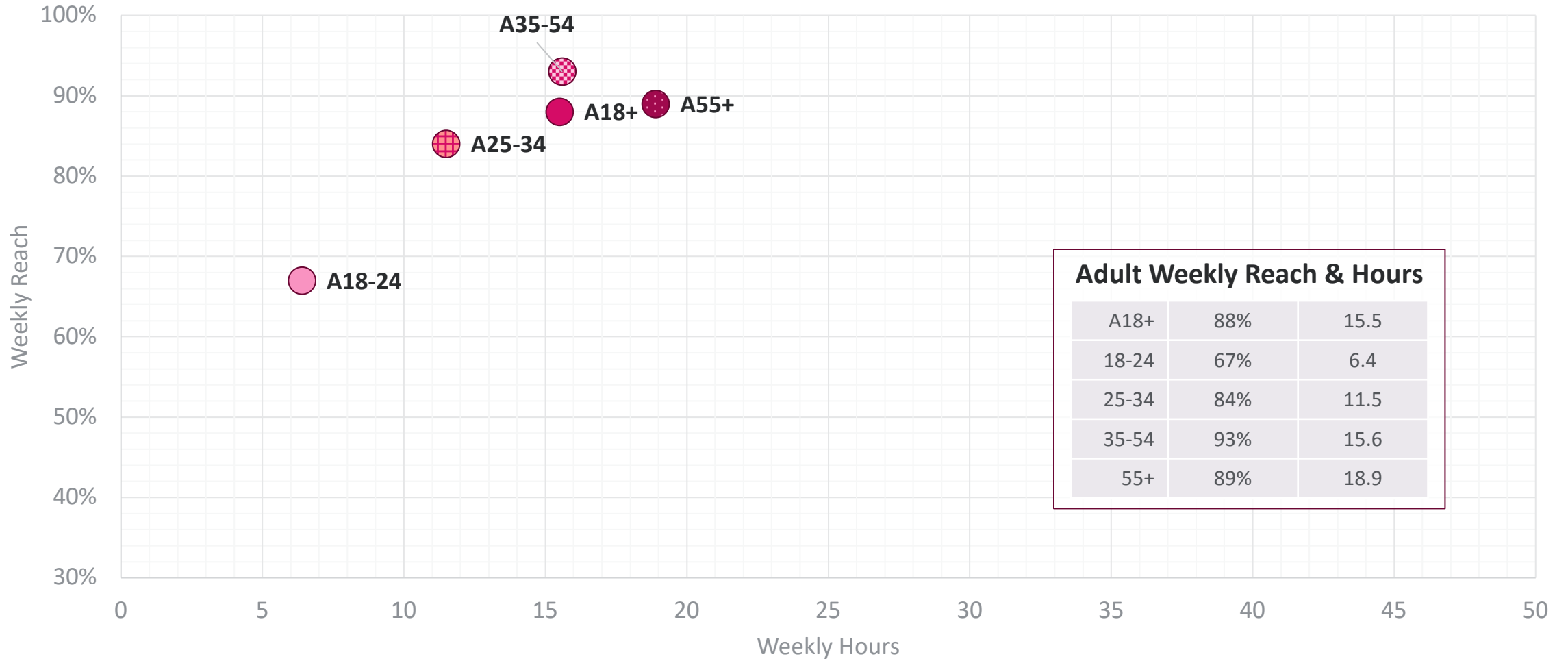


Audio





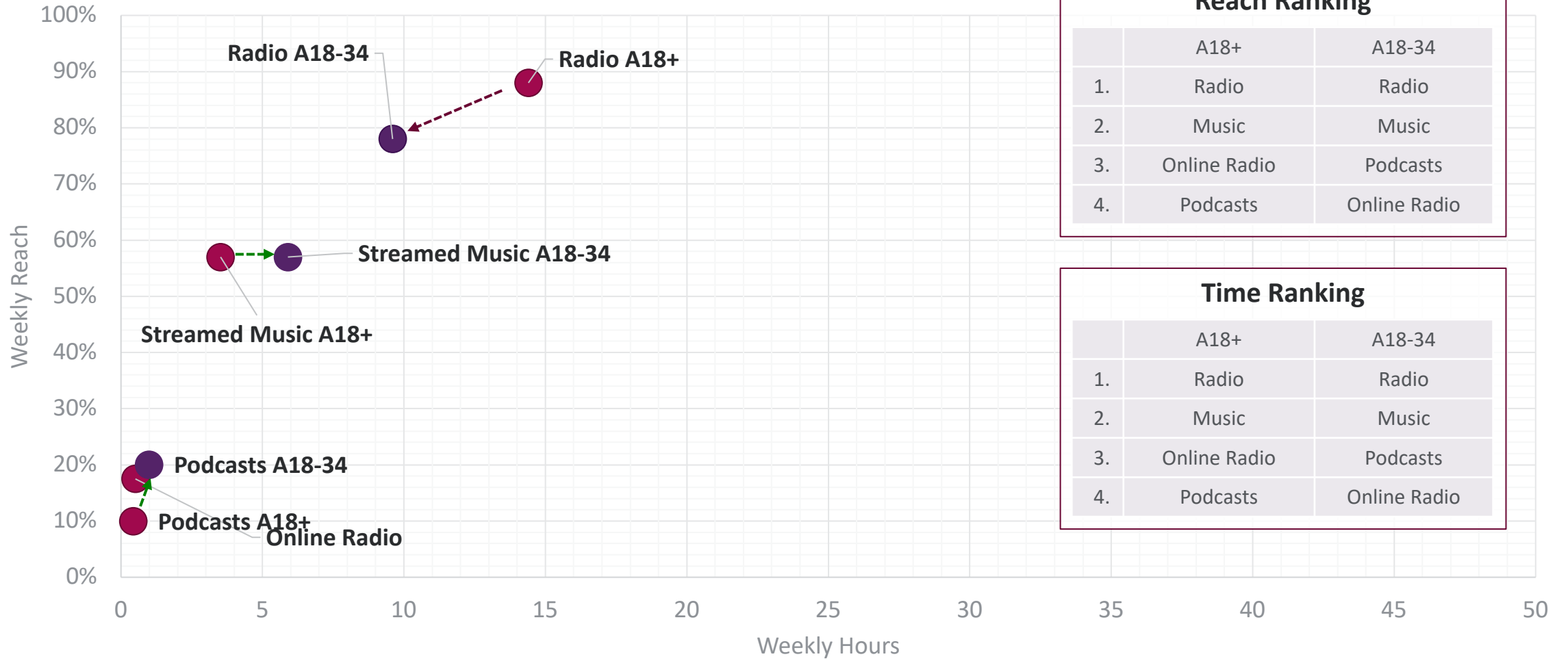
Radio



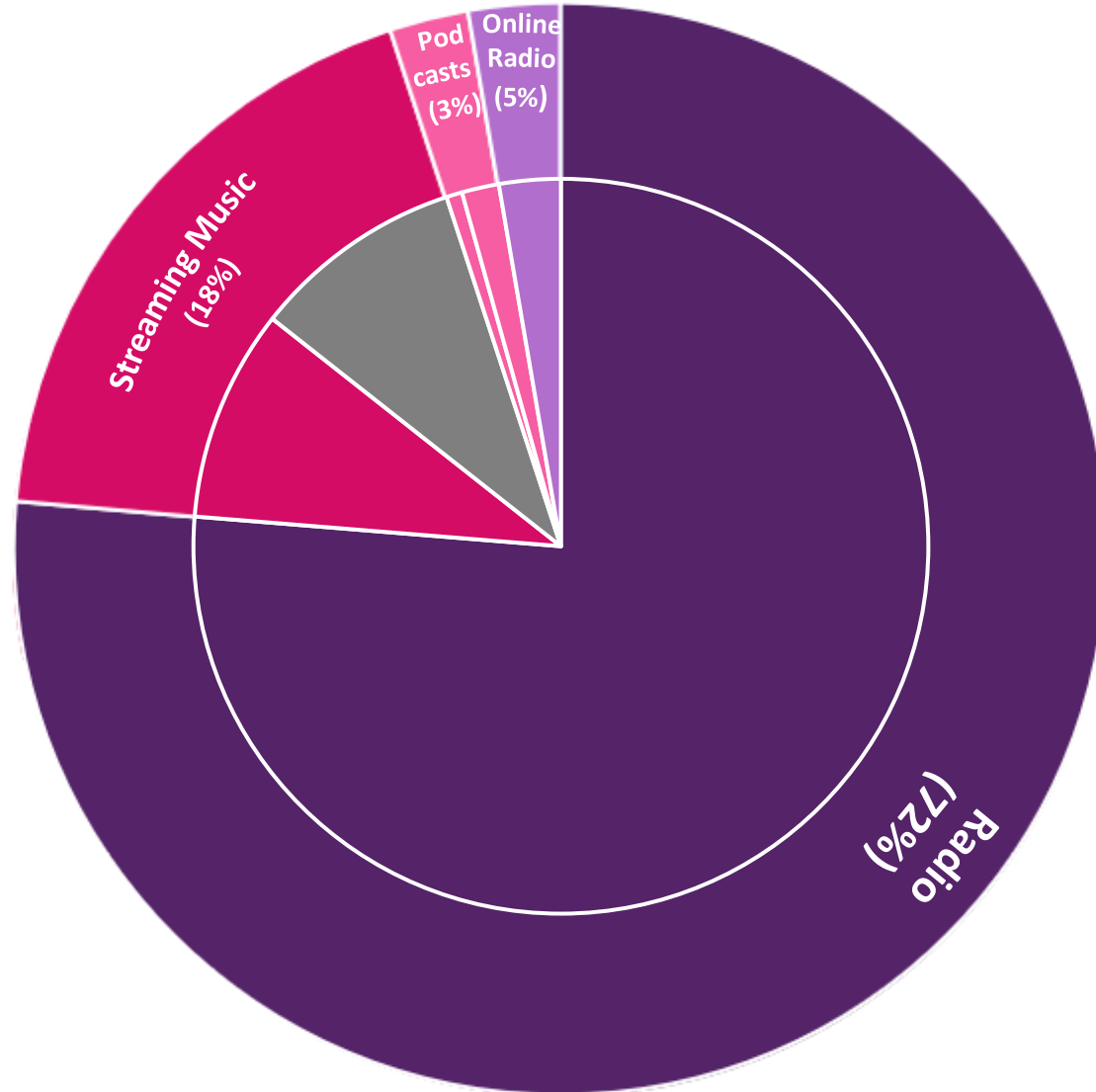
| | | |
|-------|-----|------|
| A18+ | 88% | 15.5 |
| 18-24 | 67% | 6.4 |
| 25-34 | 84% | 11.5 |
| 35-54 | 93% | 15.6 |
| 55+ | 89% | 18.9 |



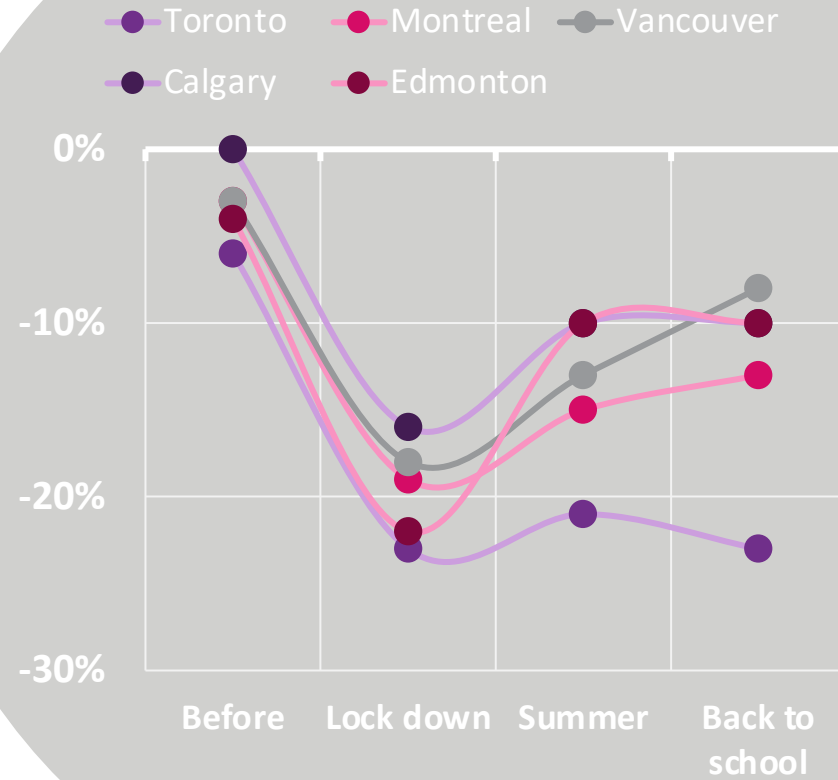
Audio



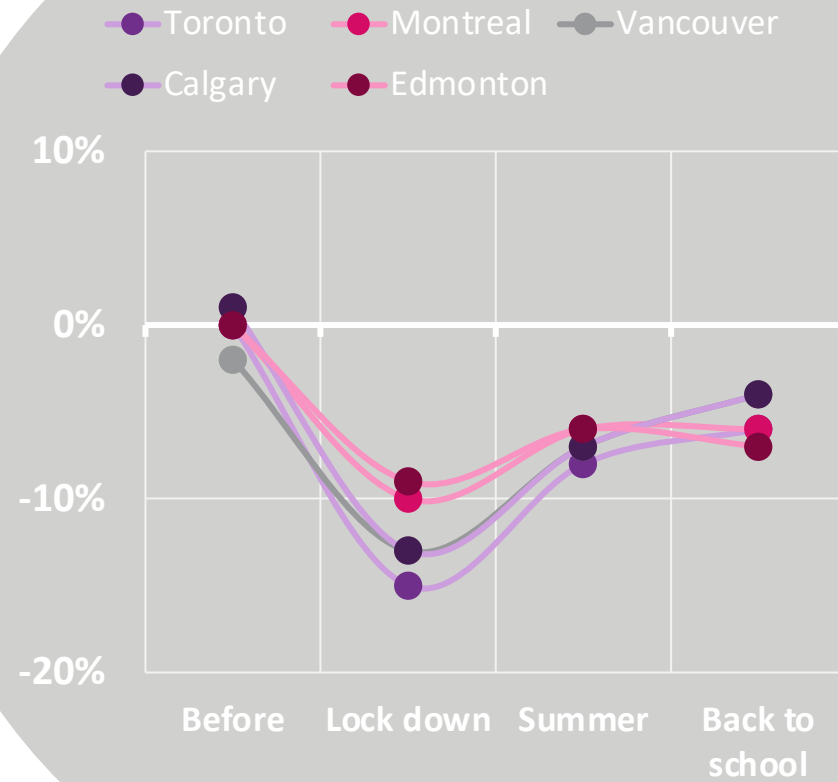
Share of Audio Time (A18+)



Radio Momentum (Time A18+)



Radio Momentum (Reach A18+)



Digital Audio



+7%

Monthly Podcast
Penetration
(English Canada)











+16%

Audio streaming visits on
desktop & mobile
(March to October vs 2019)³






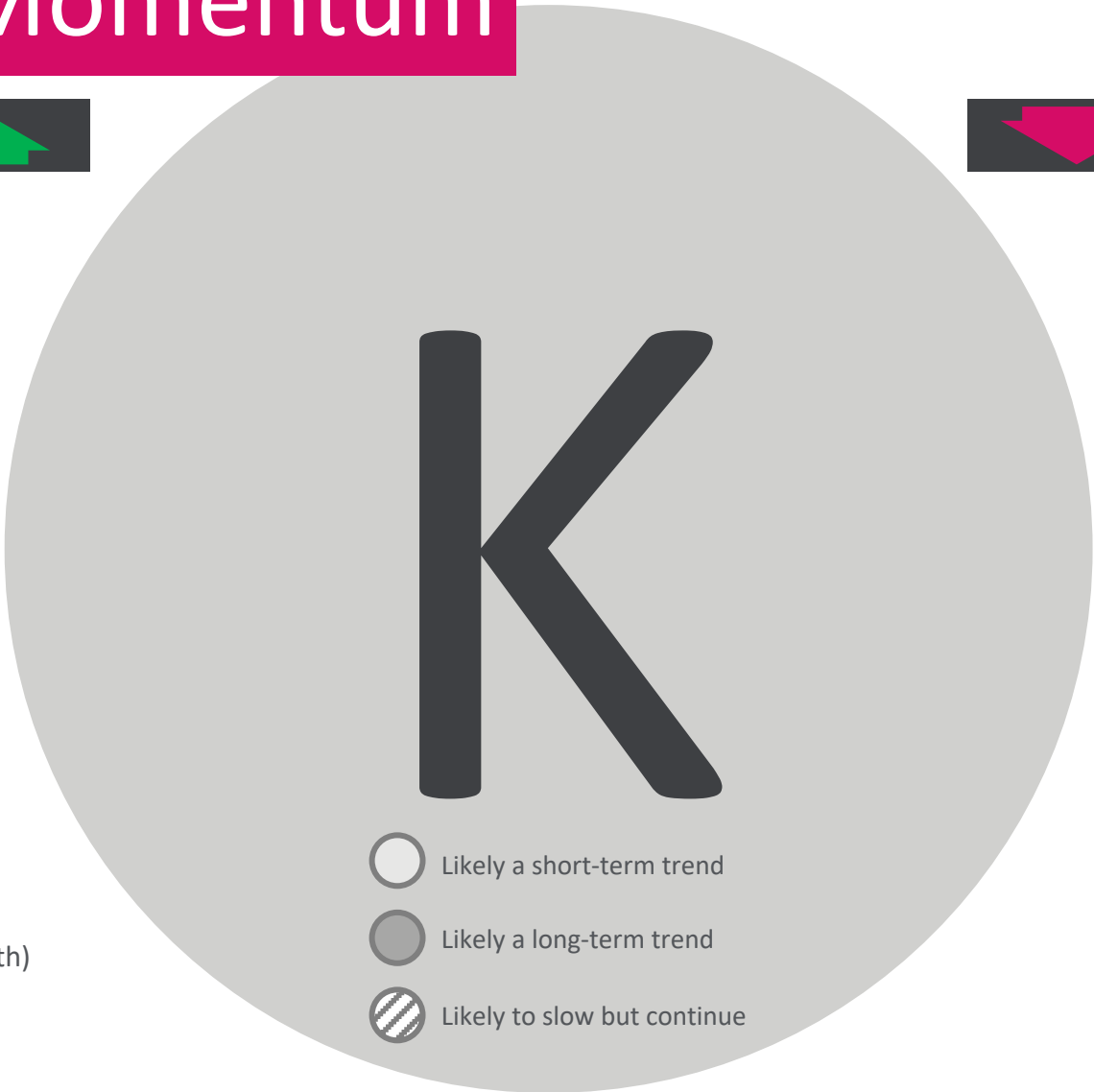
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-  **Digital Audio**
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+7% Podcast penetration (~2 yrs growth)

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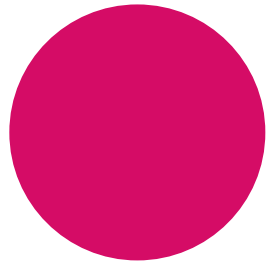
-  Likely a short-term trend
-  Likely a long-term trend
-  Likely to slow but continue





Top Canadian Book in Canada?

Margaret Atwood: The Testaments



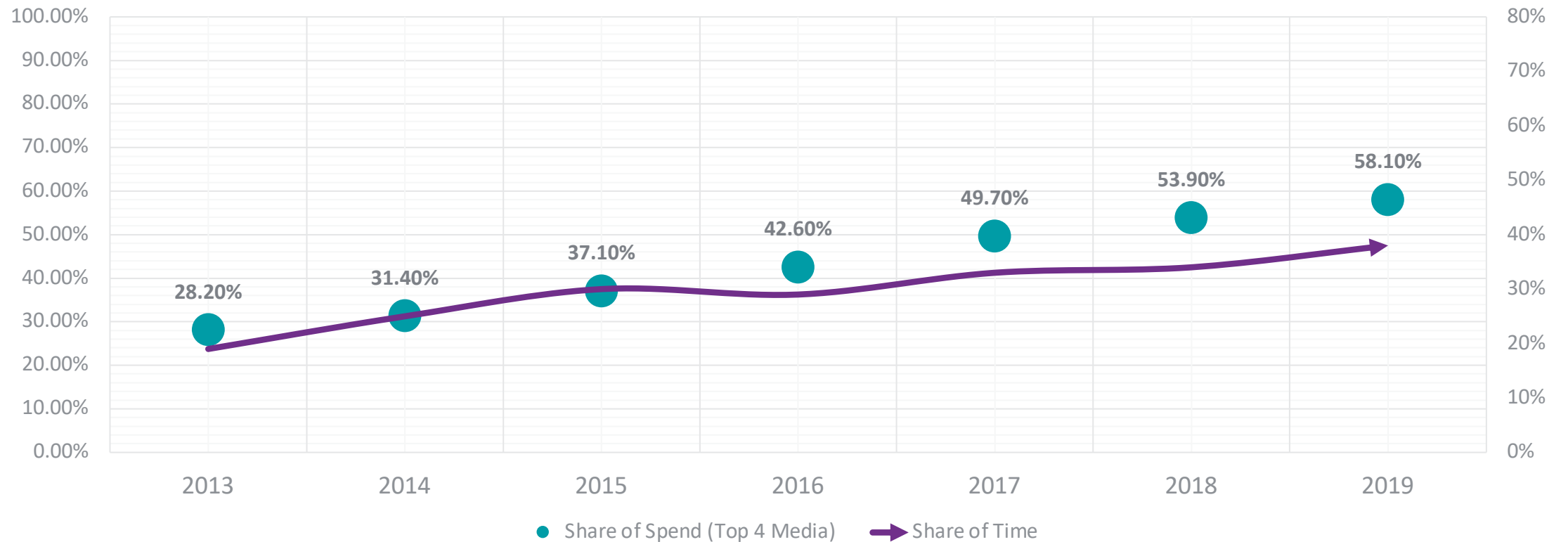


eCommerce



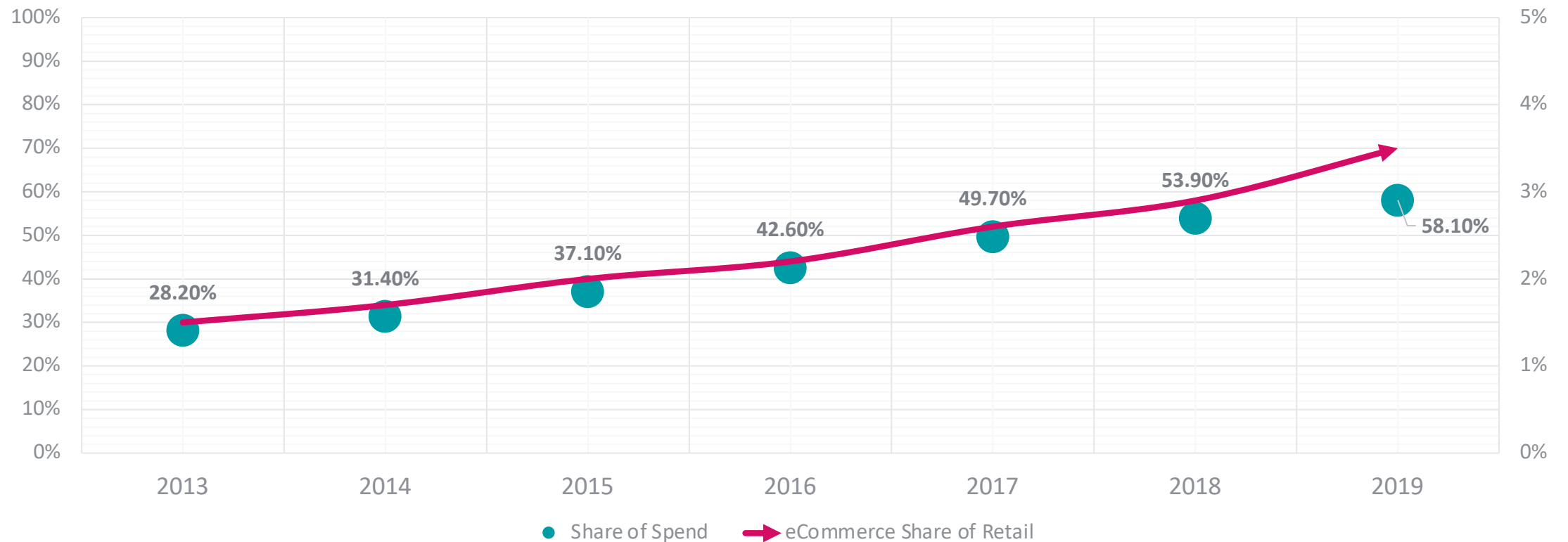
Digital \$ out-pacing Share of Time

Internet Share of Time vs Share of Spend



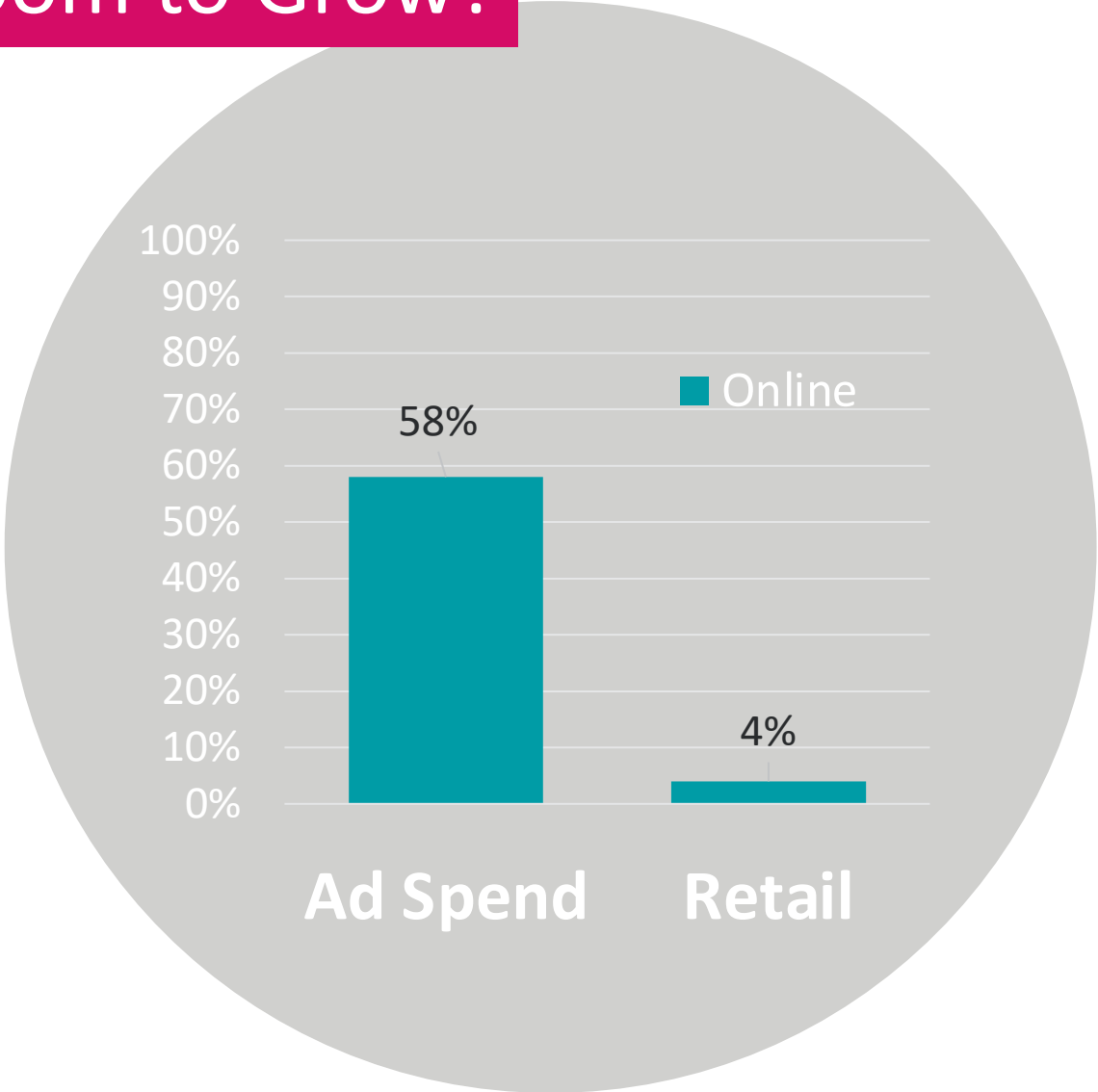
Digital \$ closely tied to eCommerce share

Internet Share of Spend vs eCommerce Share of Retail

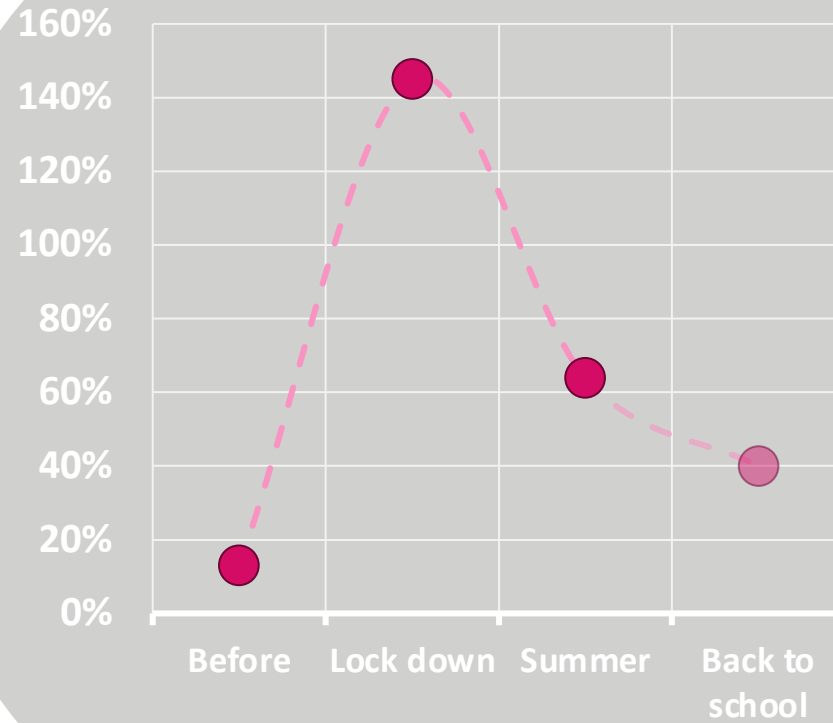




Room to Grow?












eCommerce Momentum








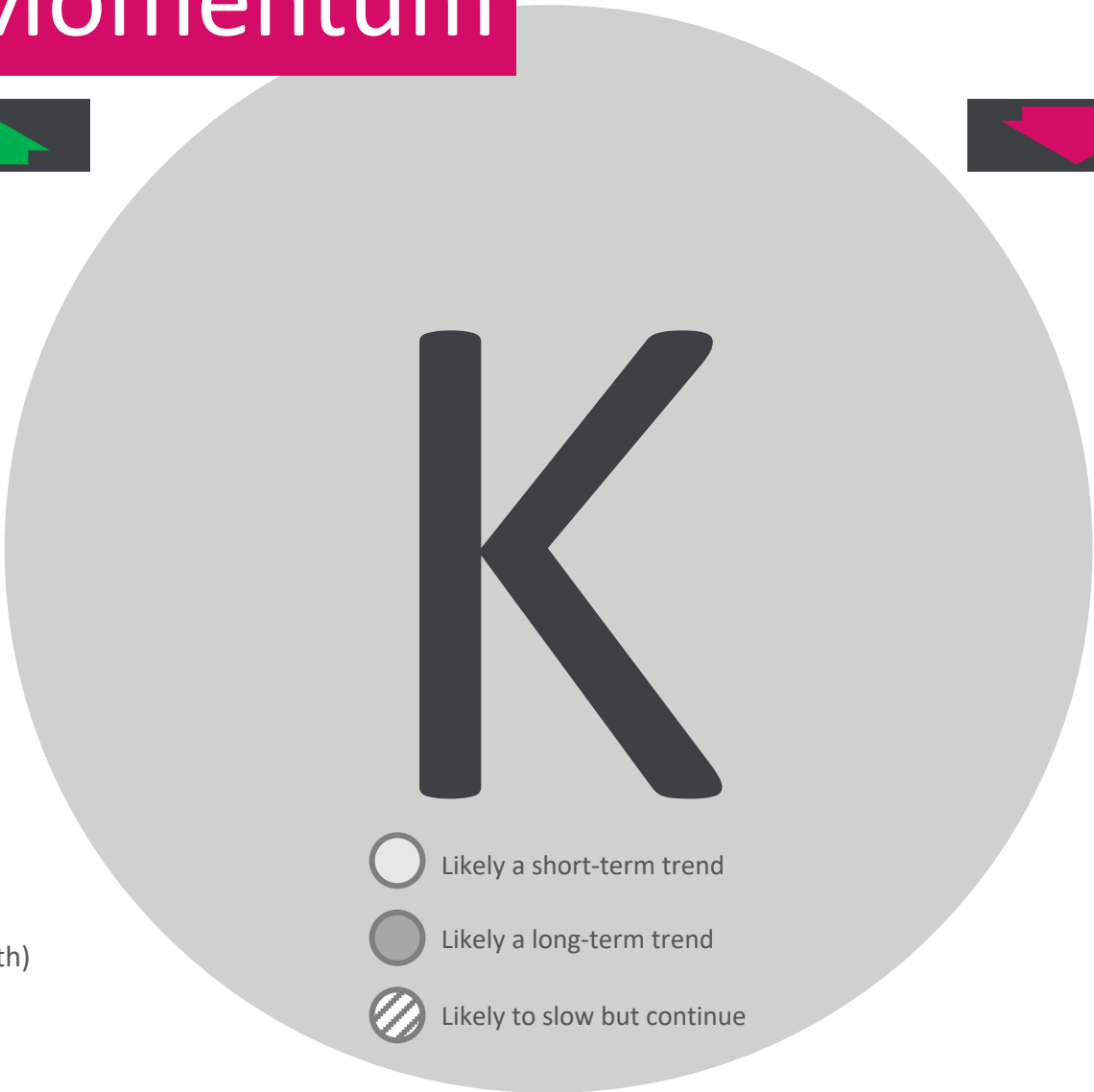
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-  **OTT**
+9% subs (~1 year of growth)¹
-  **Digital Video**
+18% site visits
-  **Digital Audio**
+9% streaming
+7% Podcast penetration (~2 yrs growth)
-  **eCommerce**
+40-60% share post-lockdown,
2-3 years of growth

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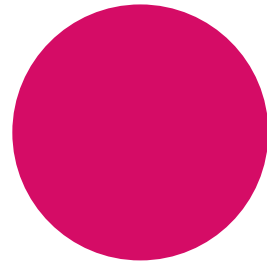
Source: Numeris, Vividata, PHD estimates from multiple sources, Pattison, MTM, Samsung, Similarweb, Canadian Podcast Listener, Statistics Canada





Top Program in Québec

Tout Le Monde en Parle



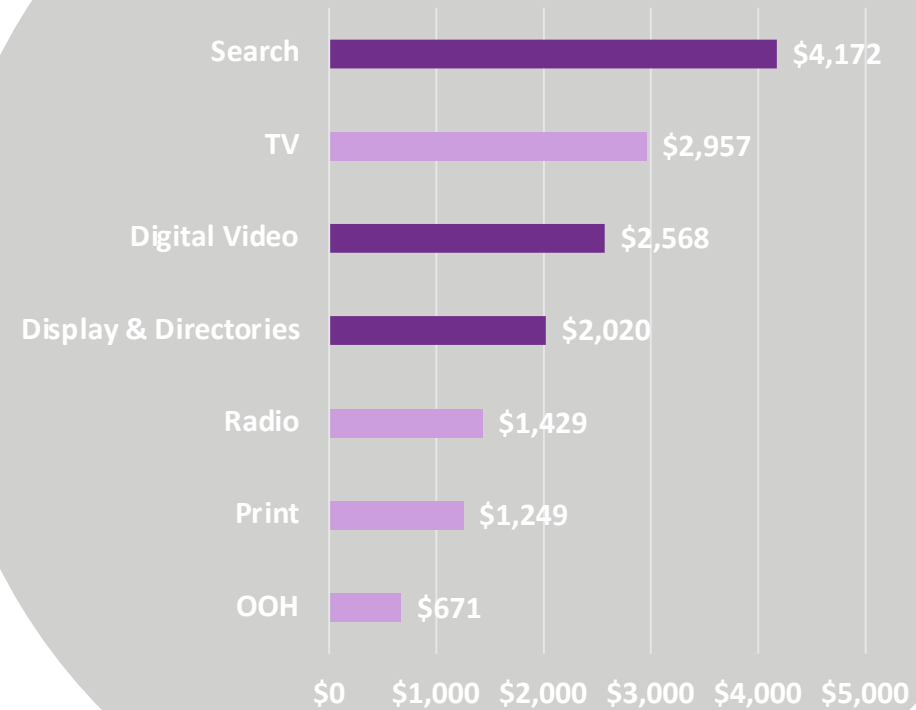


Money



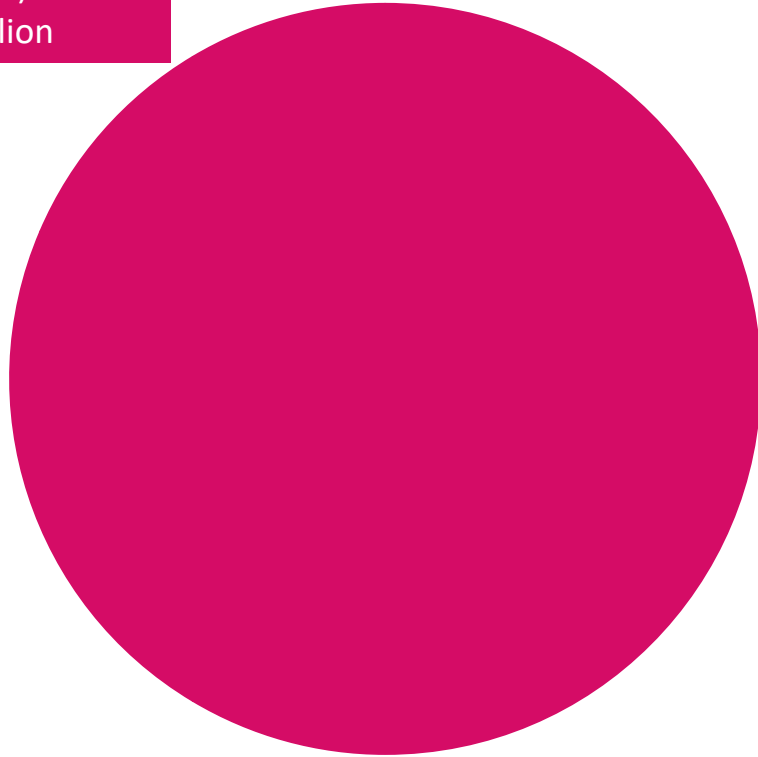
Digital Dominates

2019 Advertising Investment





Total Advertising
(Top 4 Media)
\$13,955 million

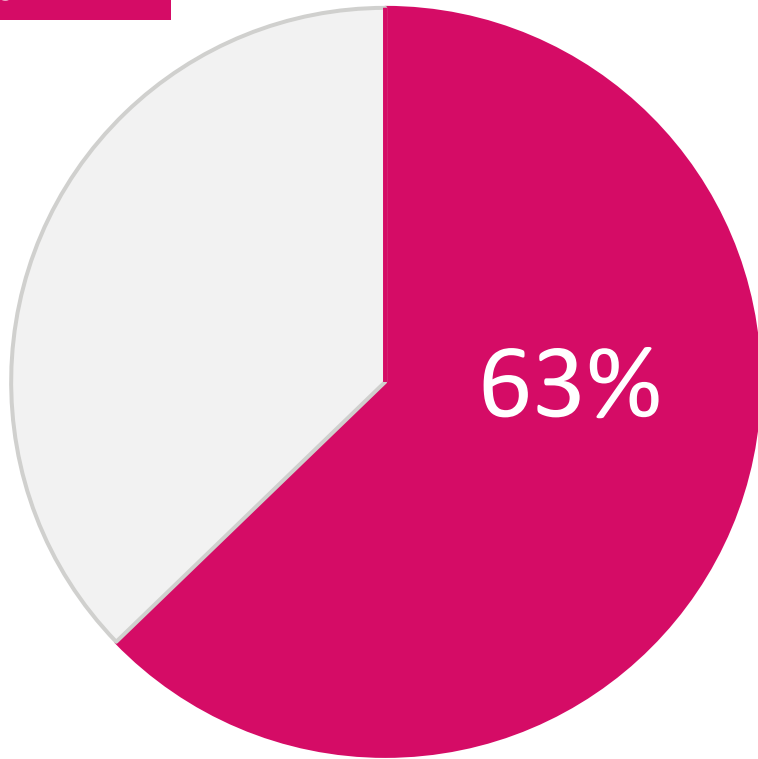


Weekly Hours
(inc Streaming)
75

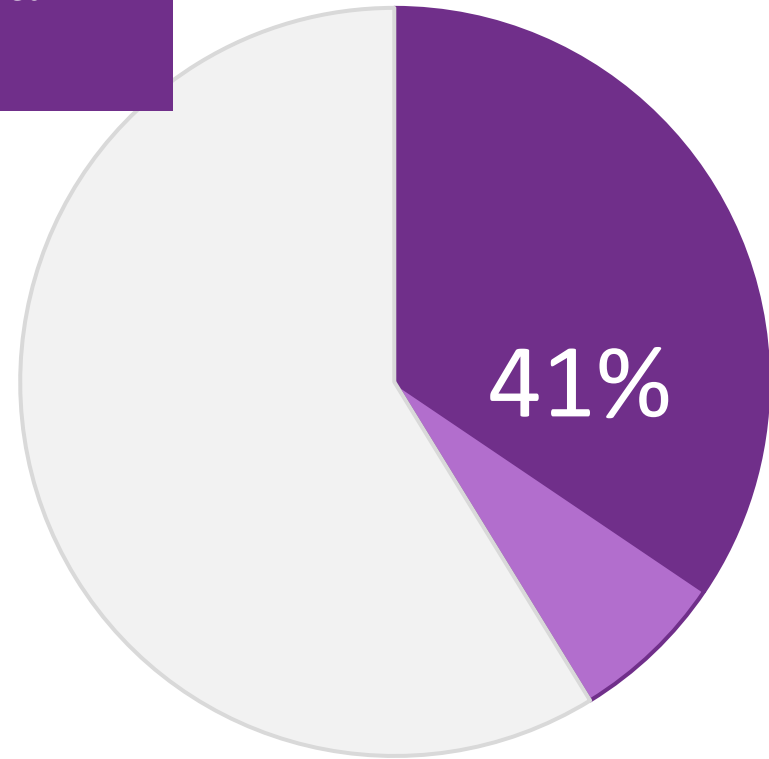




Internet
\$8,760 million

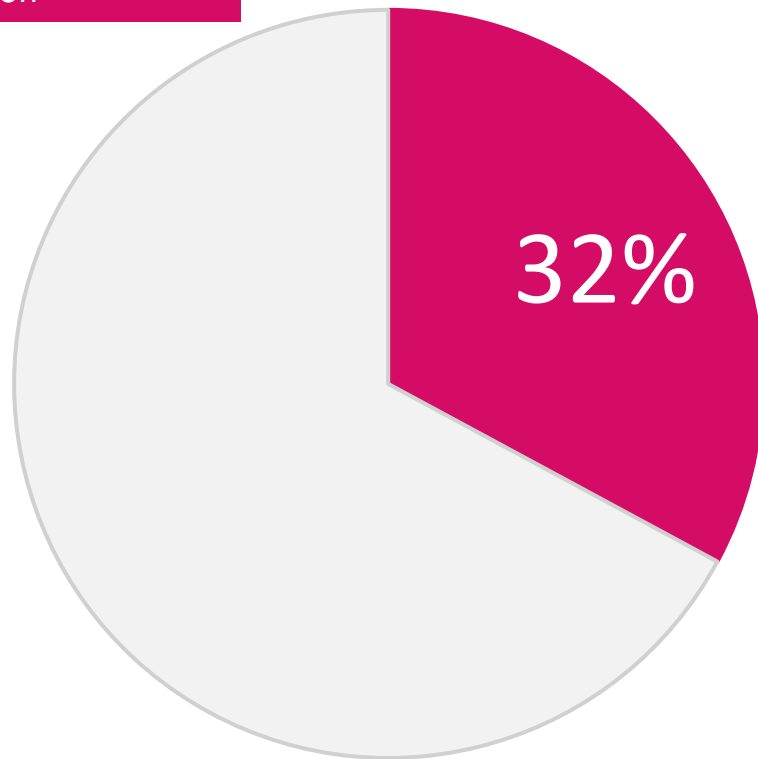


Internet
(inc Ad-funded
Streaming)
28

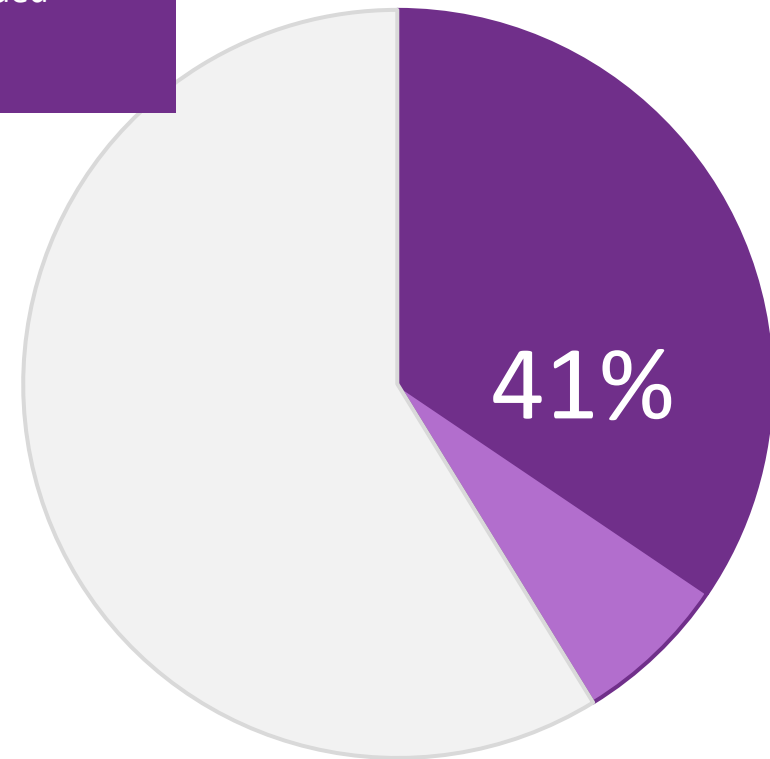




Internet ex Search
\$4,588 million

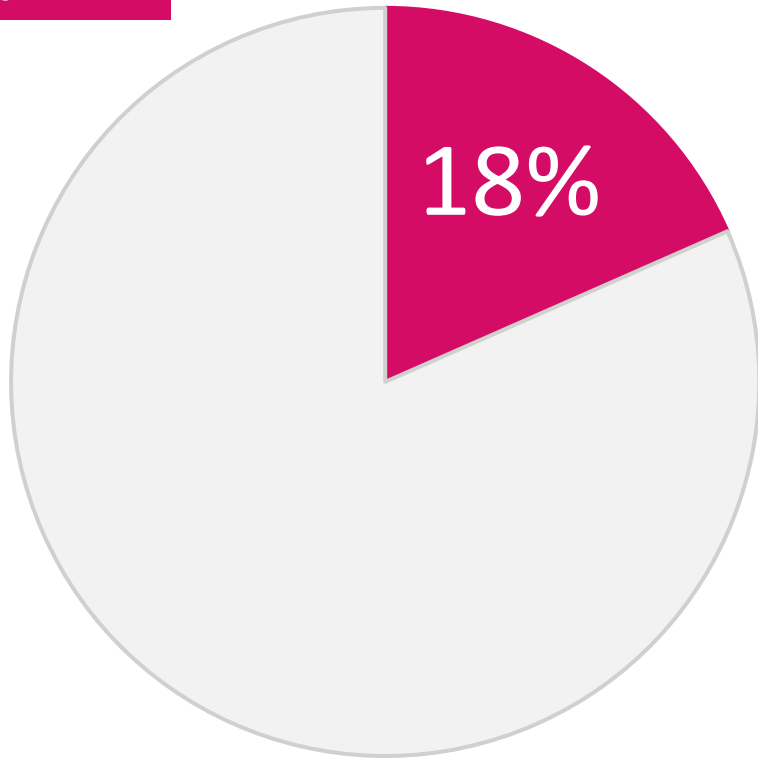


Weekly Hours
(inc Ad-funded
Streaming)
28

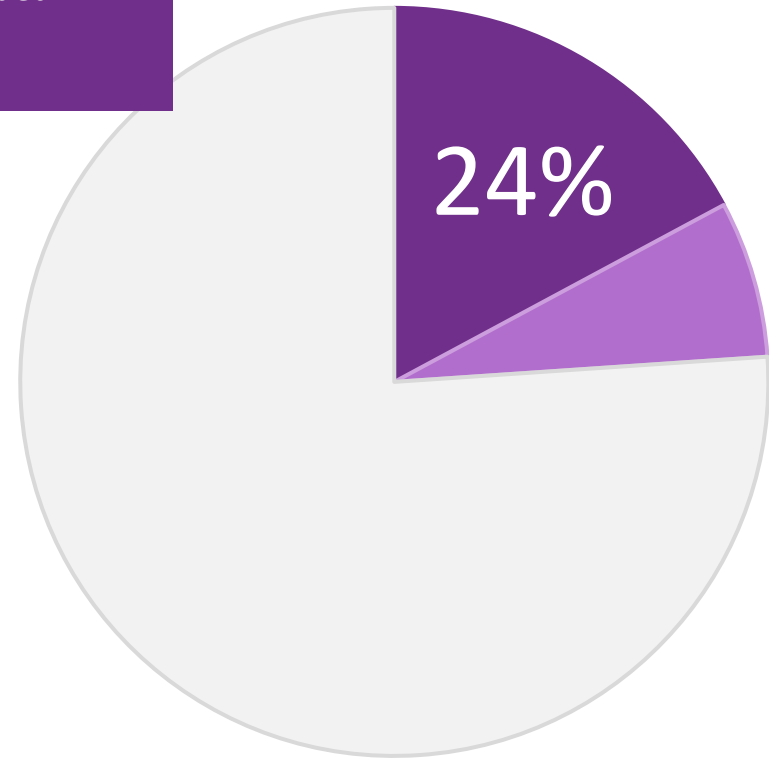




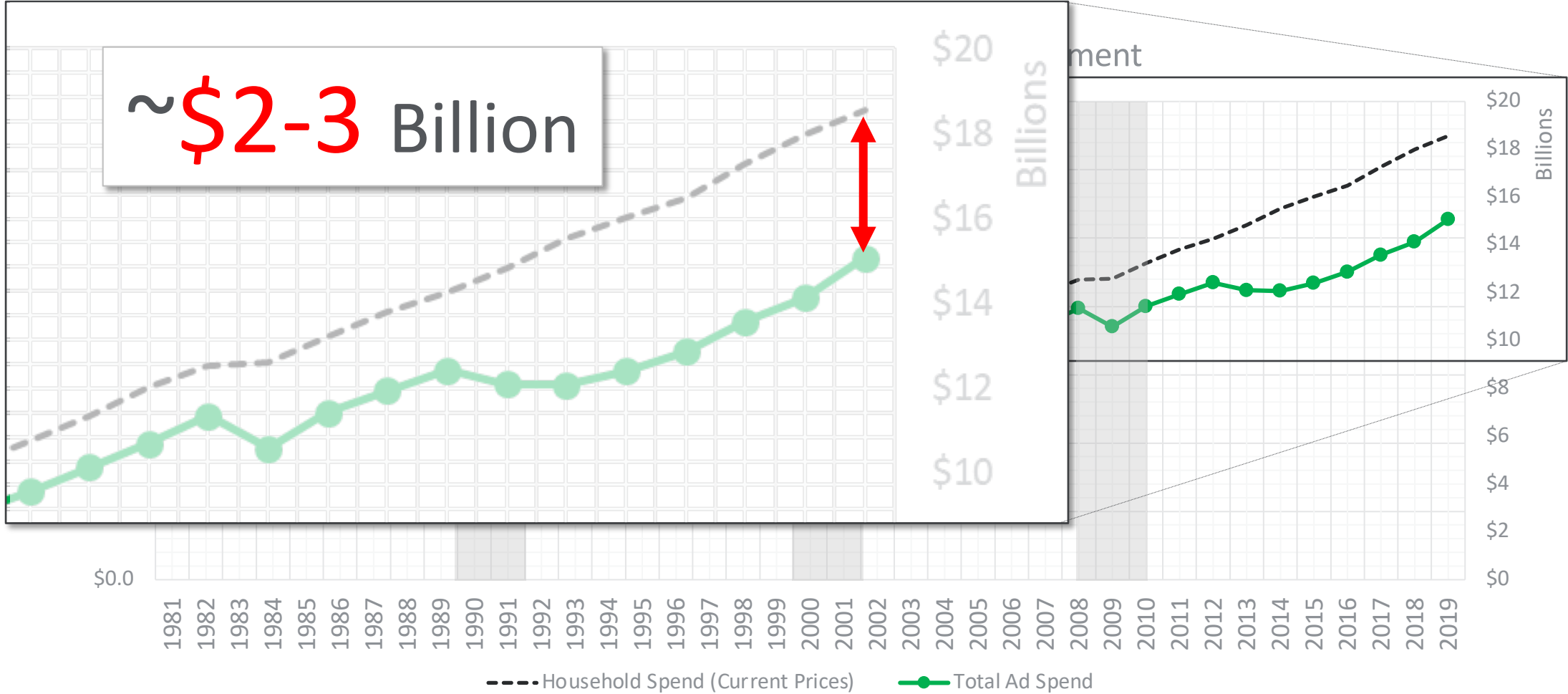
Video
\$2,568 million



Digital Video
(inc Ad-Funded
Streaming)
16



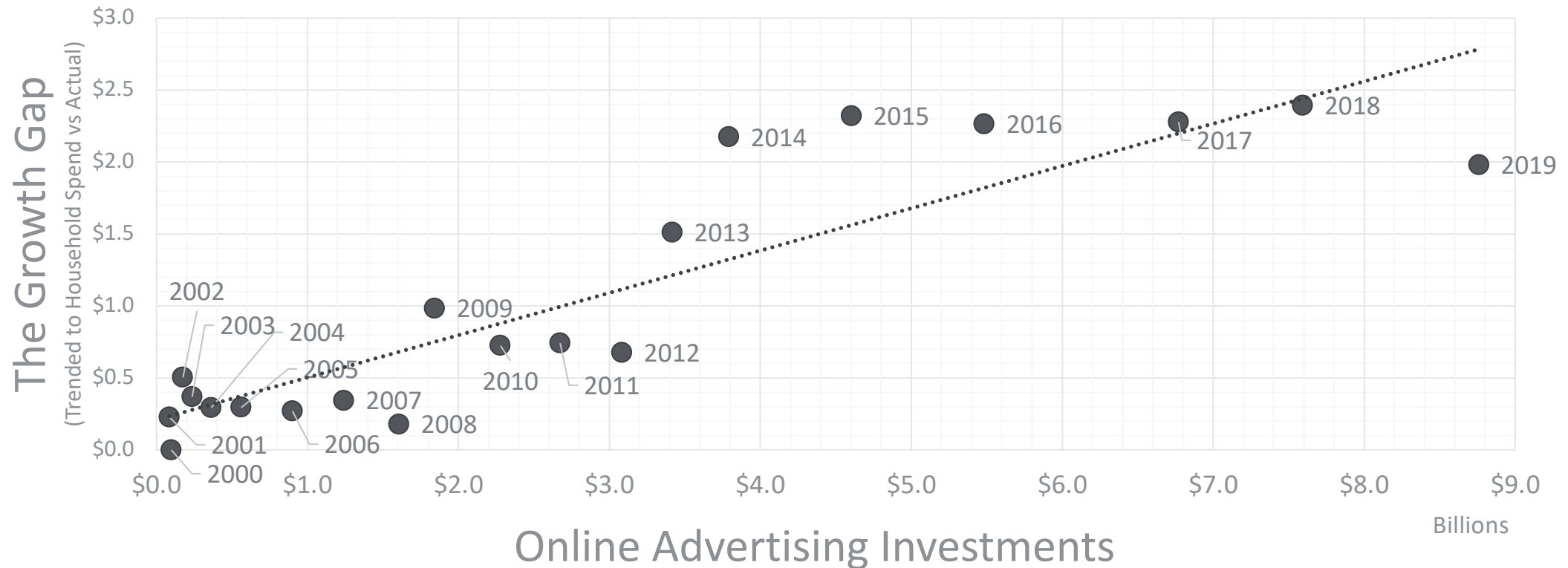
The Growth Gap



Is Digital Contributing to the Growth Gap?

\$1 gain in digital investment correlates to \$0.35 increase in the Growth Gap

The Growth Gap vs Online Advertising



Are Brands Missing Growth Opportunity?



Journal of Advertising

Routledge
Taylor & Francis Group

ISSN: 0091-3367 (Print) 1557-7805 (Online) Journal homepage: <http://www.tandfonline.com/loi/ujoa20>

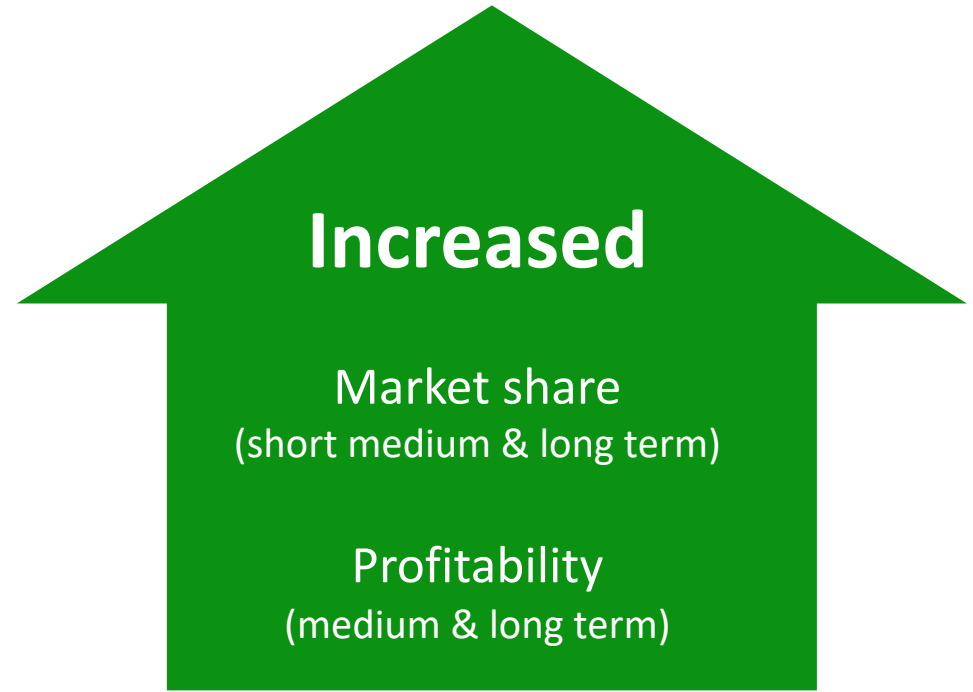
Advertising Budgeting: A Reinvestigation of the Evidence on Brand Size and Spend

Nick Danenberg, Rachel Kennedy, Virginia Beal & Byron Sharp

To cite this article: Nick Danenberg, Rachel Kennedy, Virginia Beal & Byron Sharp (2015): Advertising Budgeting: A Reinvestigation of the Evidence on Brand Size and Spend, Journal of Advertising, DOI: [10.1080/00913367.2015.1090938](https://doi.org/10.1080/00913367.2015.1090938)

To link to this article: <http://dx.doi.org/10.1080/00913367.2015.1090938>

Investing in Ads in a downturn

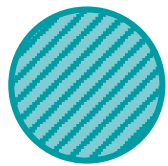




Momentum

Upward Momentum 

 Downward Momentum






Digital advertising's share of total investment



Overall advertising spend



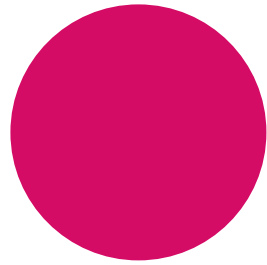
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Classical Plot

Shane, 1953



Lone Hero, 'lowly' status

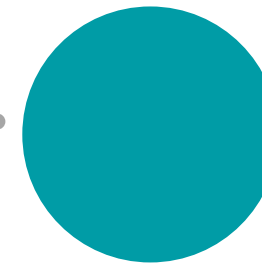
Protects the community

Morally good



Professional Plot

Magnificent Seven,
1960



Team of experts

Compete with the villains

Morally ambivalent







Implications



Major Trends

1.

Lots of opportunity for reach and competition for investment

2.

Advertising-accessible share of time is shrinking

3.

Video is growing overall across multiple devices

4.

Measurement is improving and continued innovation needed

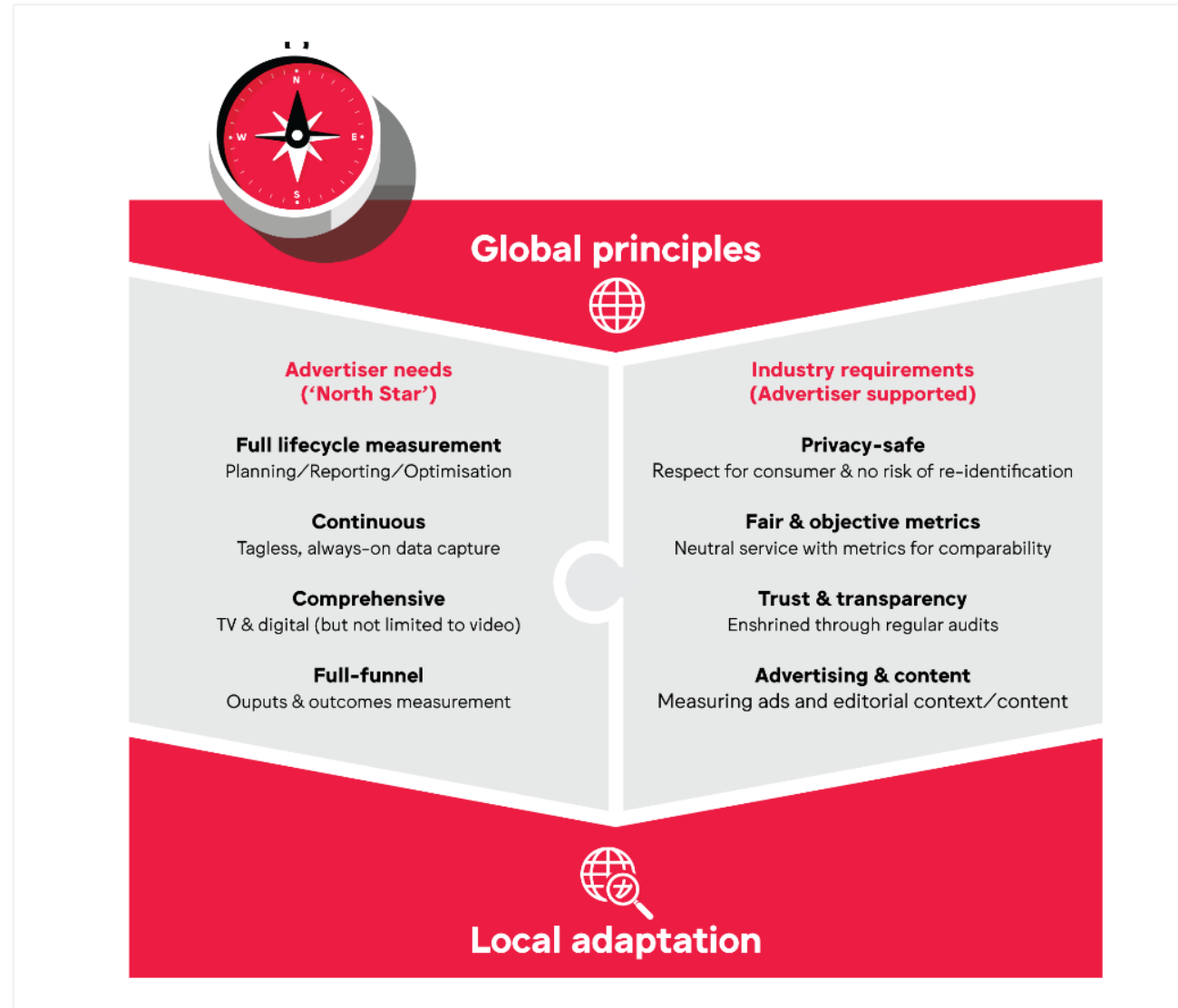
5.

eCommerce has been a major driver of digital spend adoption

6.

Overall, digital is now dominant but in a declining industry

The World Federation of Advertisers View...



Sustainable Growth: Industry

1.

Marketing Effectiveness

Sponsor industry efforts. Simplify brand equity measurement. Minimize over-attribution.

2.

Measurement

Engage with MRC. Embrace WFA.

3.

Share of Voice Reporting

Report faster, more granular

Sustainable Growth: Advertisers & Agencies

1.

Marketing Effectiveness

Understand short & long term impacts. Minimize over-attribution.

2.

Fund appropriately

Build demand *and* fund transition to eCommerce reality

3.

Objectives then channels

Build reach & impact across media

One more thing



1.

Transcend
platforms

2.

Resonate with
Culture

3.

Bring people
together

Additional Material



Grace Kite:
The Two Tasks of Online Advertising



Orlando Wood:
*EffWorks Global 2020:
Achtung!*
(Features of Successful Online Video Campaigns)



Gerard J. Tellis:
A Critical Review of Research on Advertising in a Recession



Thank you

