

A person in a dark jacket 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 a distant star, creating a sense of wonder and exploration. The overall color palette is dominated by deep blues, purples, and greens, with numerous small, bright stars scattered across the sky.

# CMUST

# 2021

Canadian Media Usage Study 2021

30 November 2021

phd



# A Marketing





# The Industry Perspective



# 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 blurred, showing what appears to be a desk with a laptop. The image is overlaid with a semi-transparent blue gradient.

**Where  
we're heading** <sup>5</sup>

# Data



Statistics Canada / Statistique Canada



Natural Resources Canada / Ressources naturelles Canada



Canada Energy Regulator / Régie de l'énergie du Canada



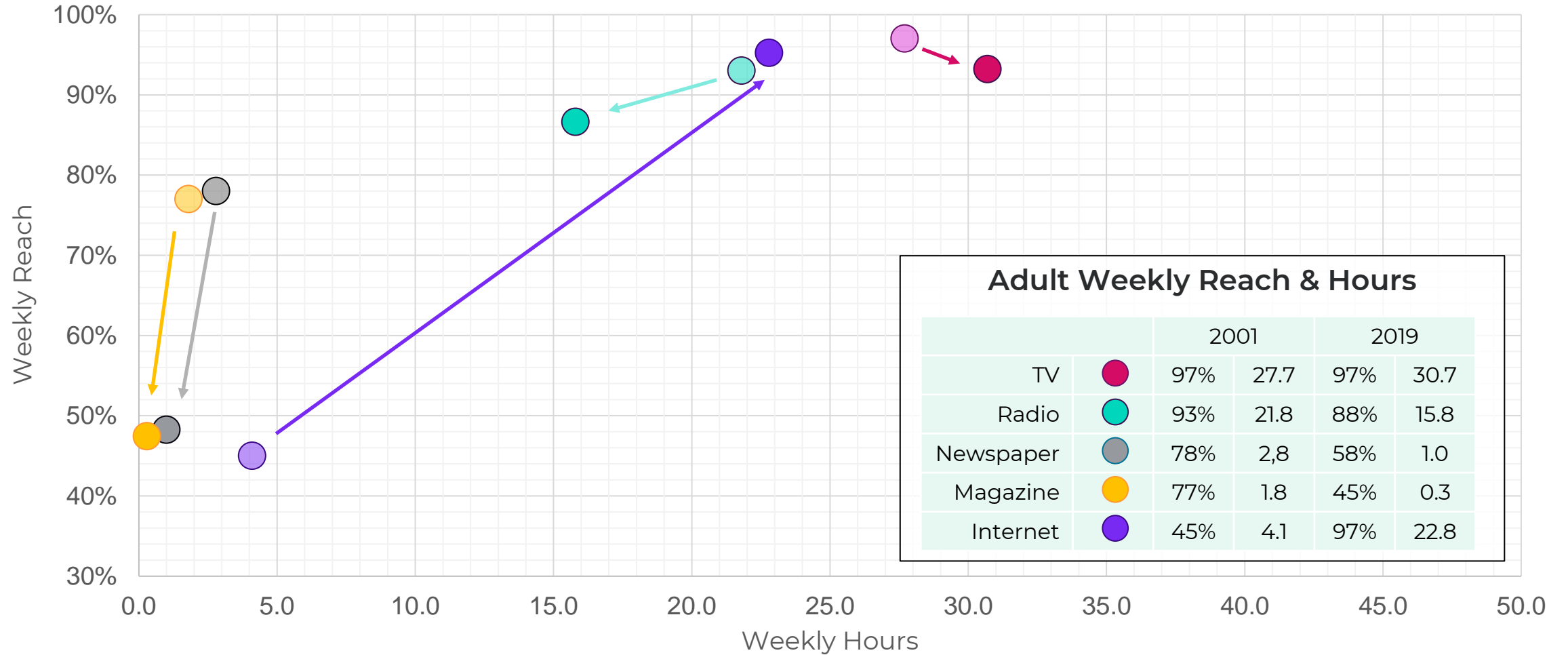


# The 'Consumer' Perspective

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

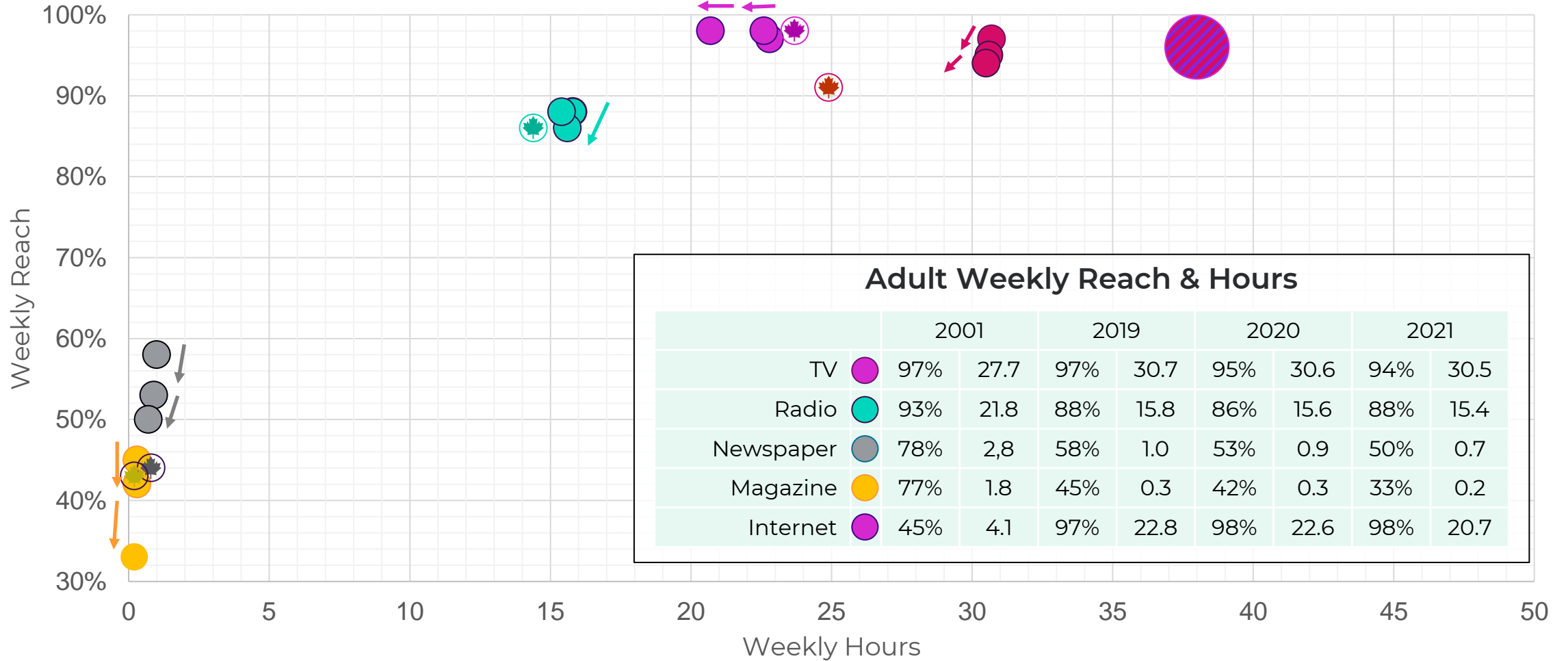
# Channel Reach & Time

# An 18-year trend



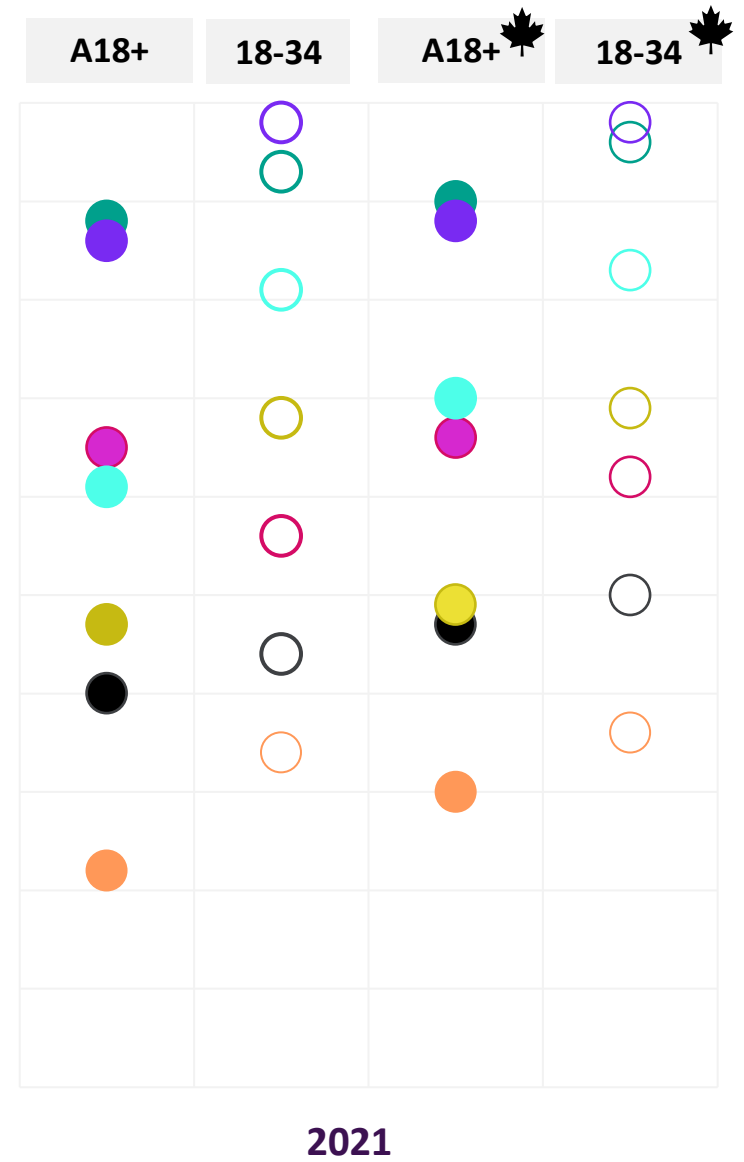
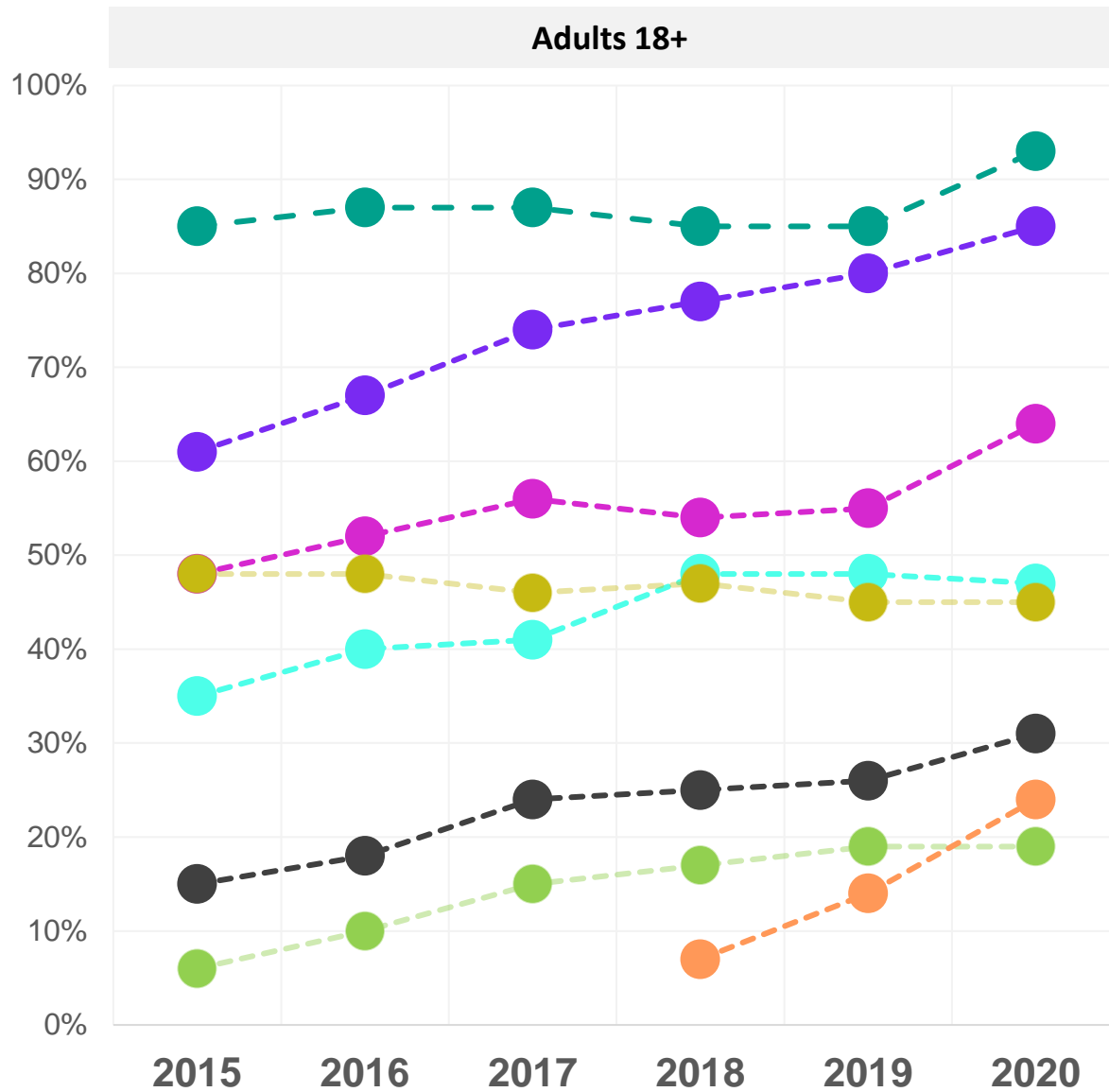
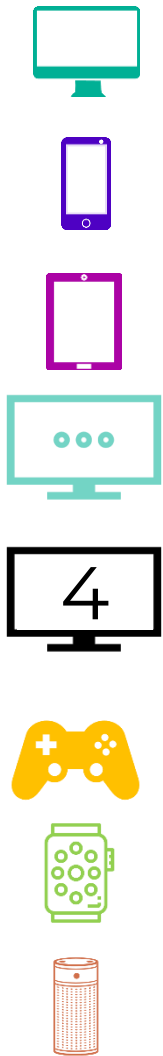
# The last 3 years: accelerating trends

Total TV Estimate  
(Linear & OTT)

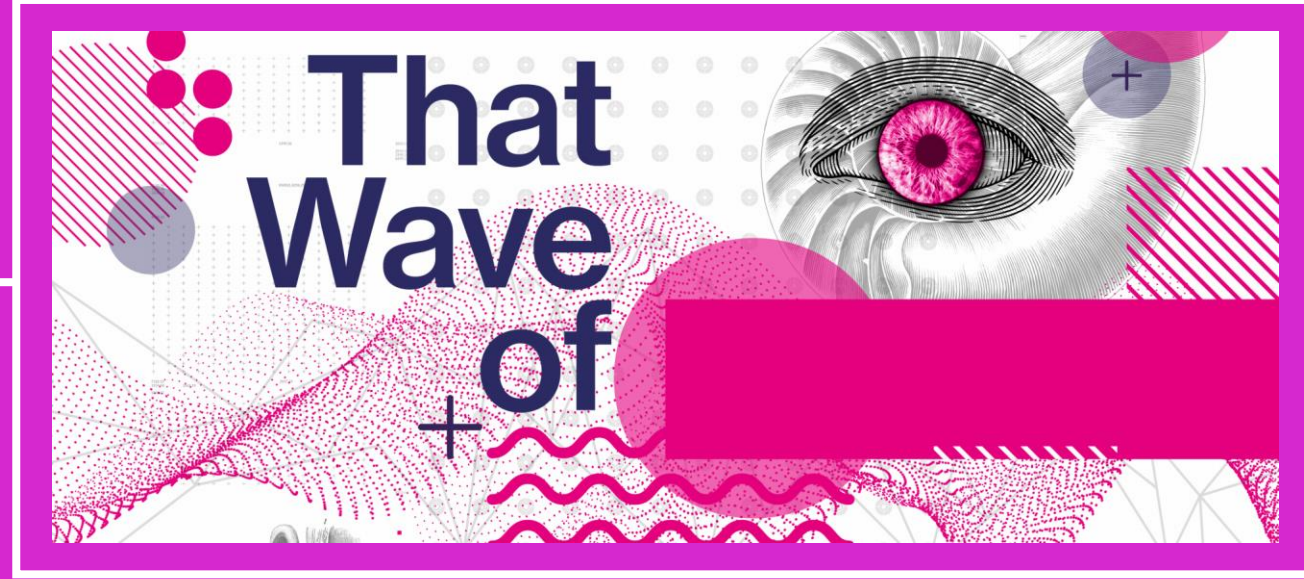




# Devices

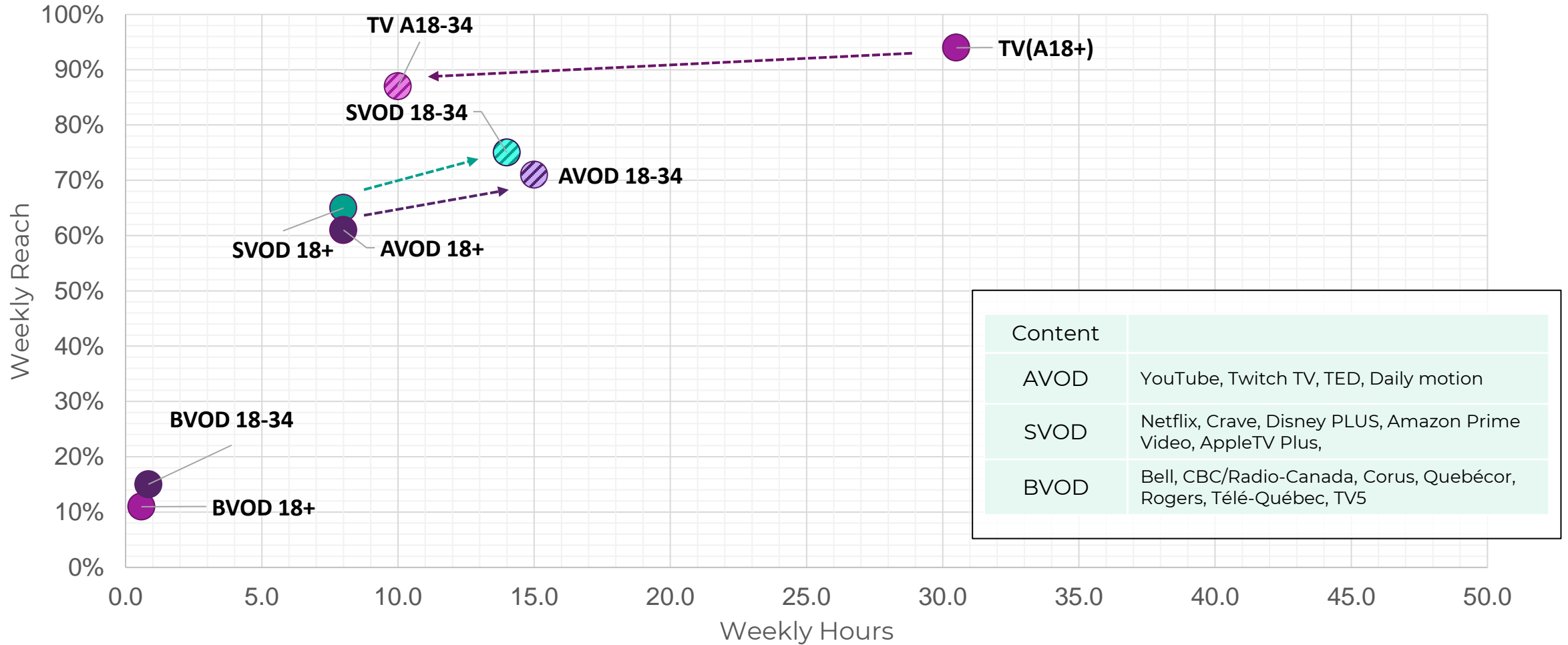


Sources: MTM Spring 2020, Fall 2020 and Spring 2021



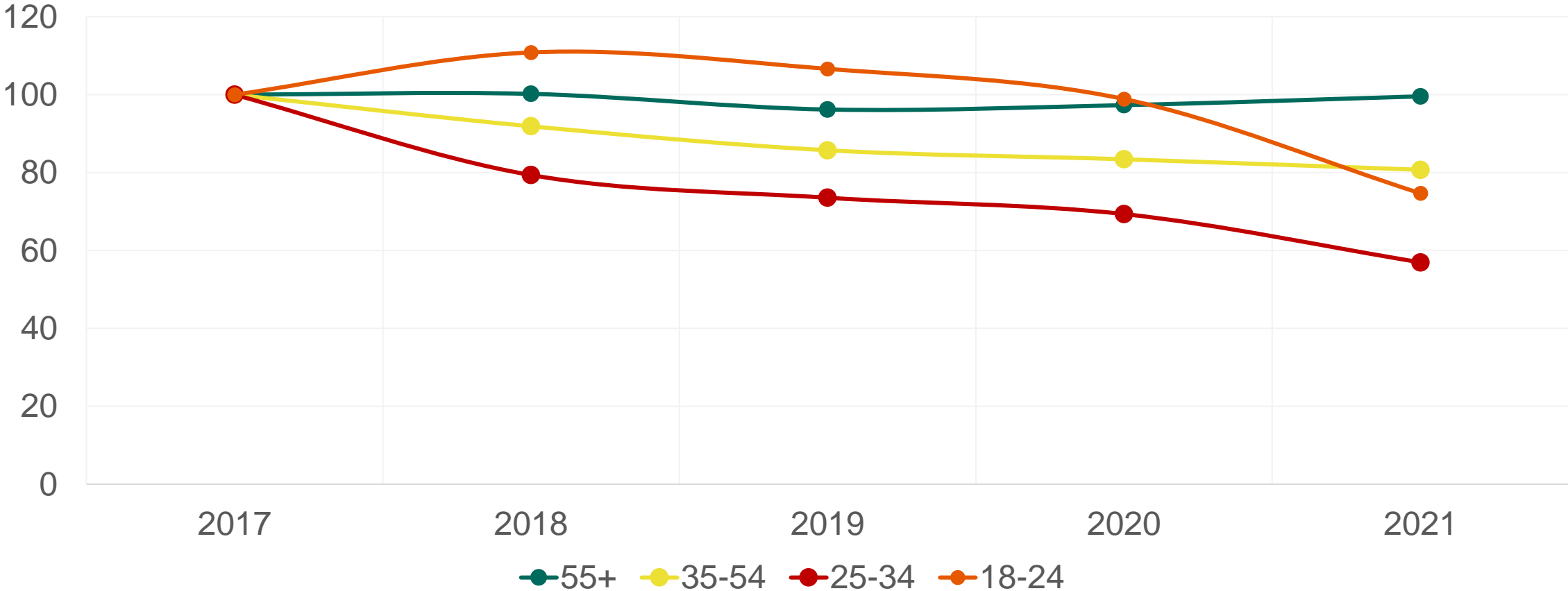
# Video

# Video habits are evolving rapidly

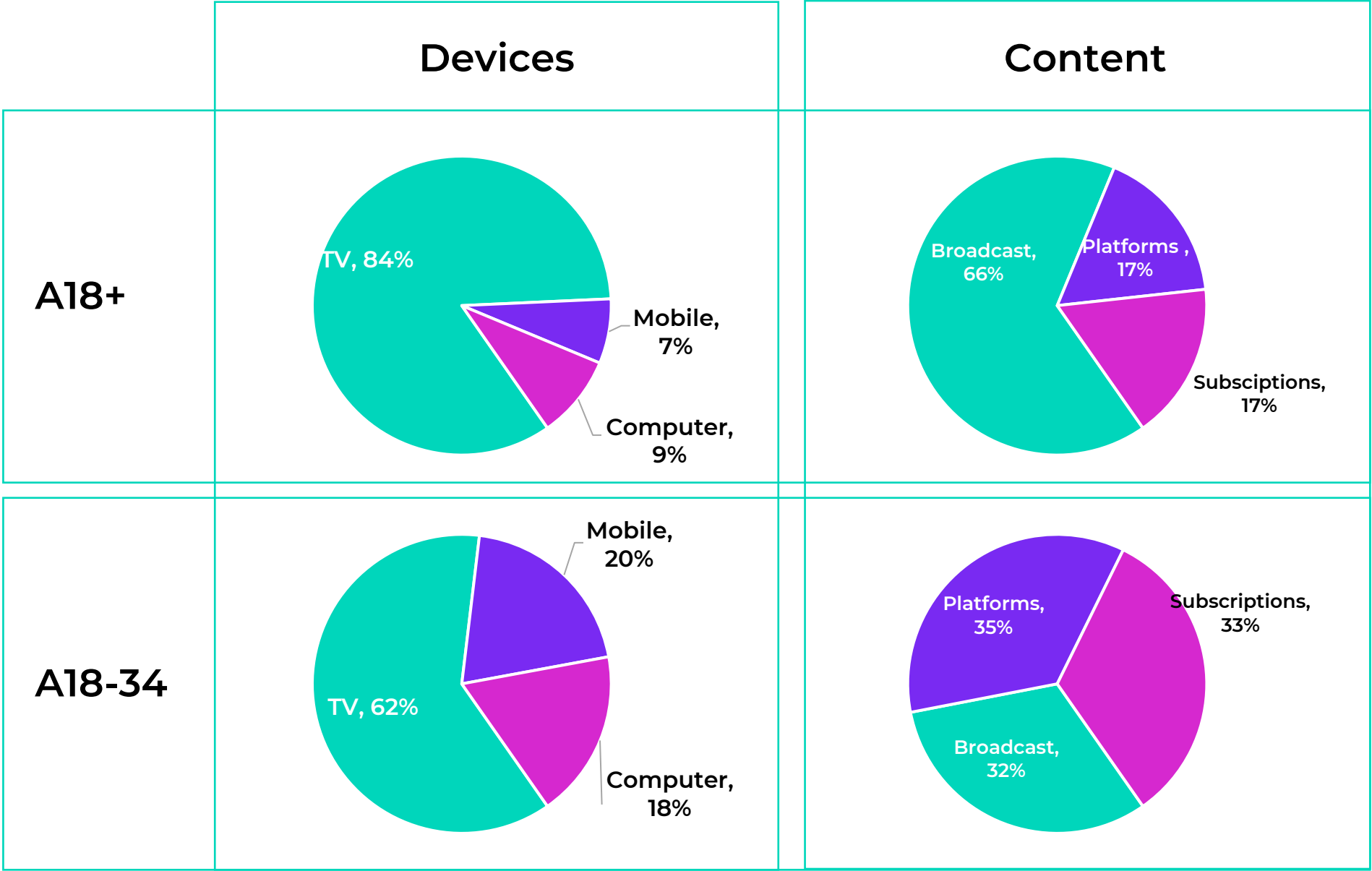


# Shift from TV has been uneven

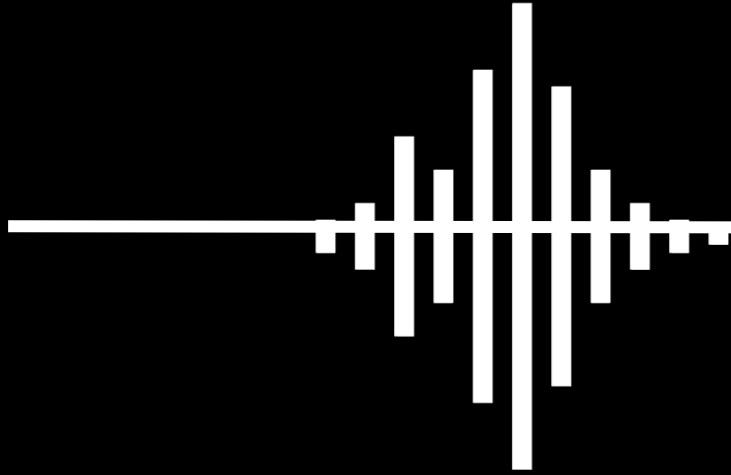
## TV Weekly Time Trends by Age Group (Indexed to 2017)



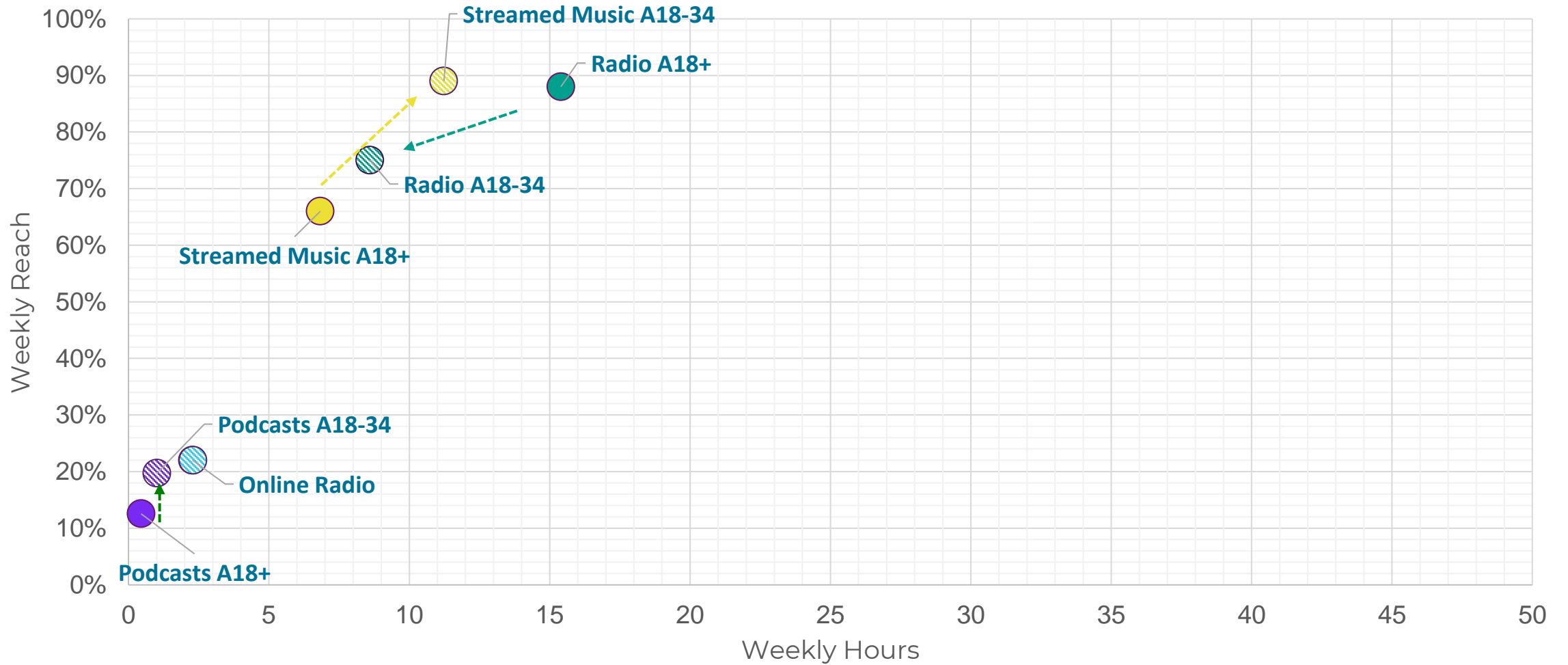
# Share of Video Time



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



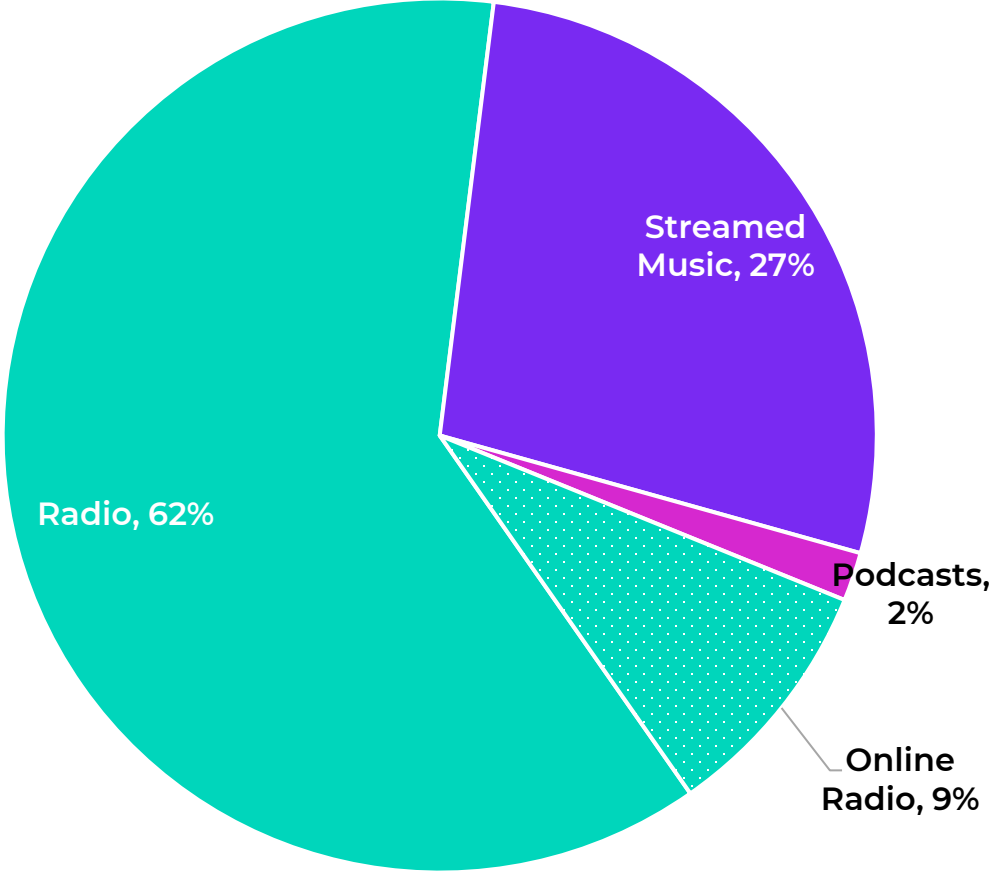
# Audio



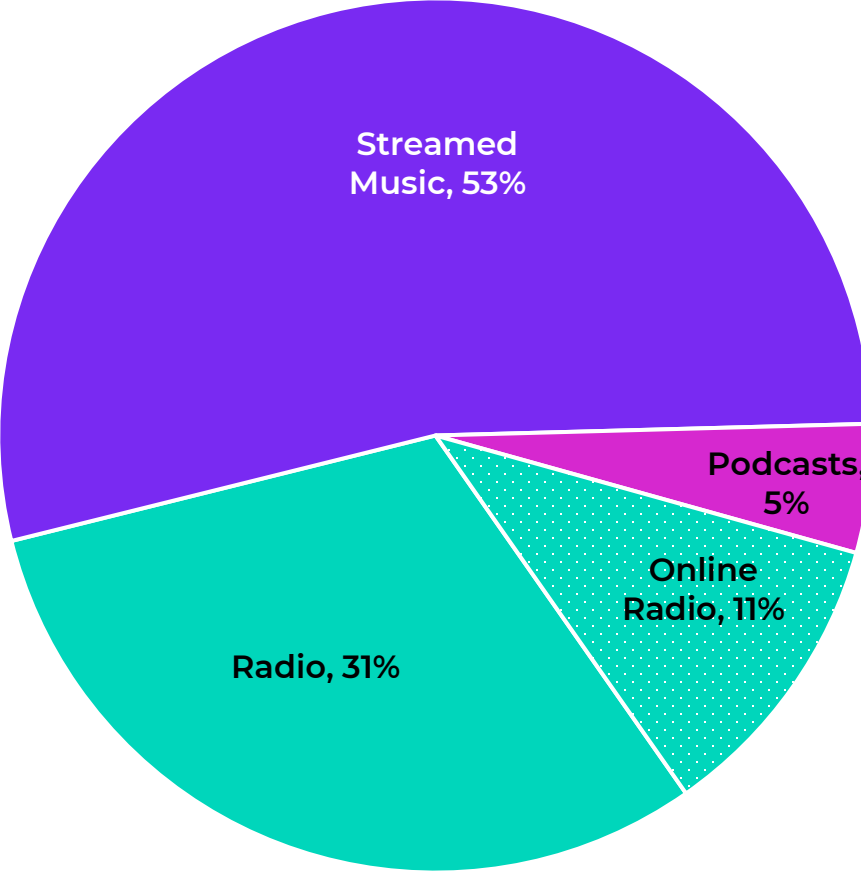
Source: *Numeris PPM Radio, MTM Spring 2021, PHD estimates from multiple industry sources, Canadian Podcast Listener*

# Share of Audio Time

A18+



A18-34

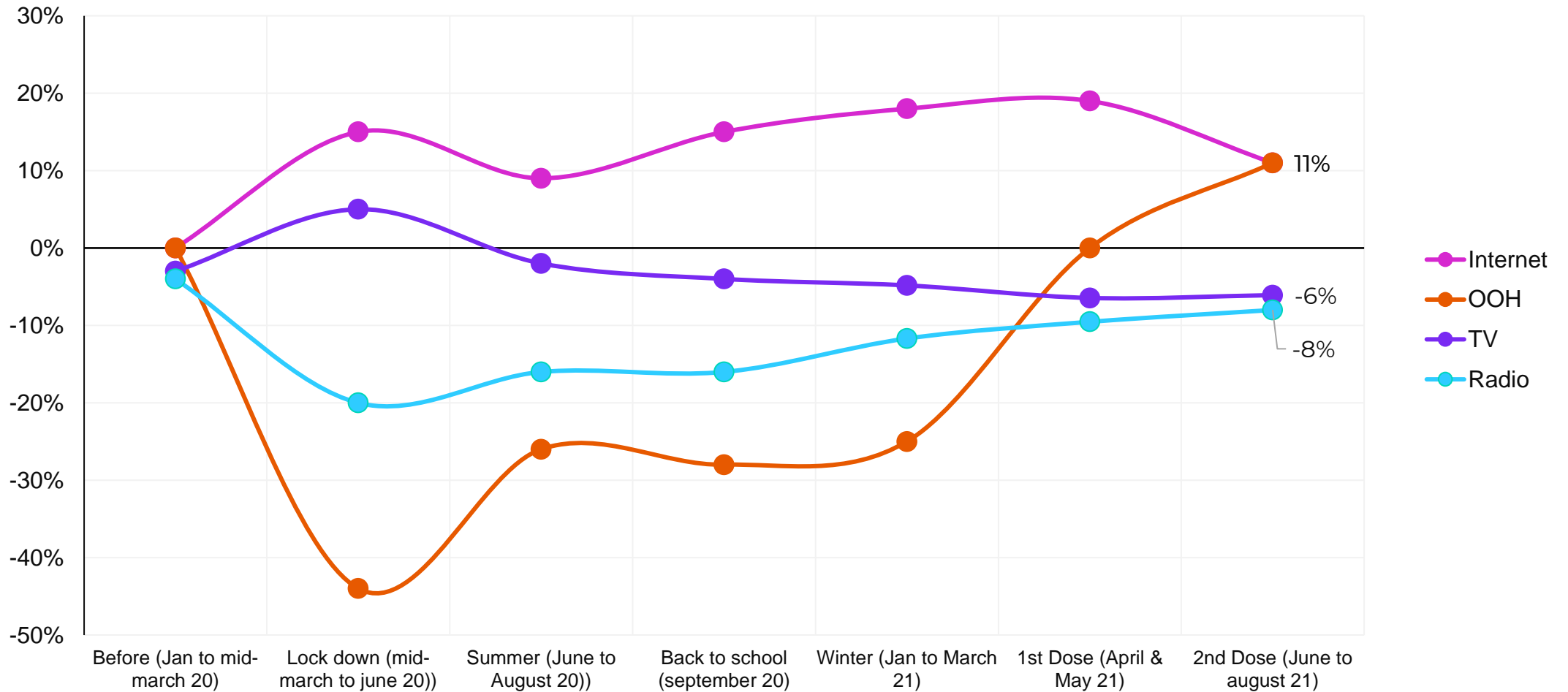


Source: Numeris PPM Radio, MTM Spring 2021, PHD estimates from multiple industry sources, Canadian Podcast Listener

# The New Normal

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# The COVID Effect



# Total Subscription spends increased during Covid

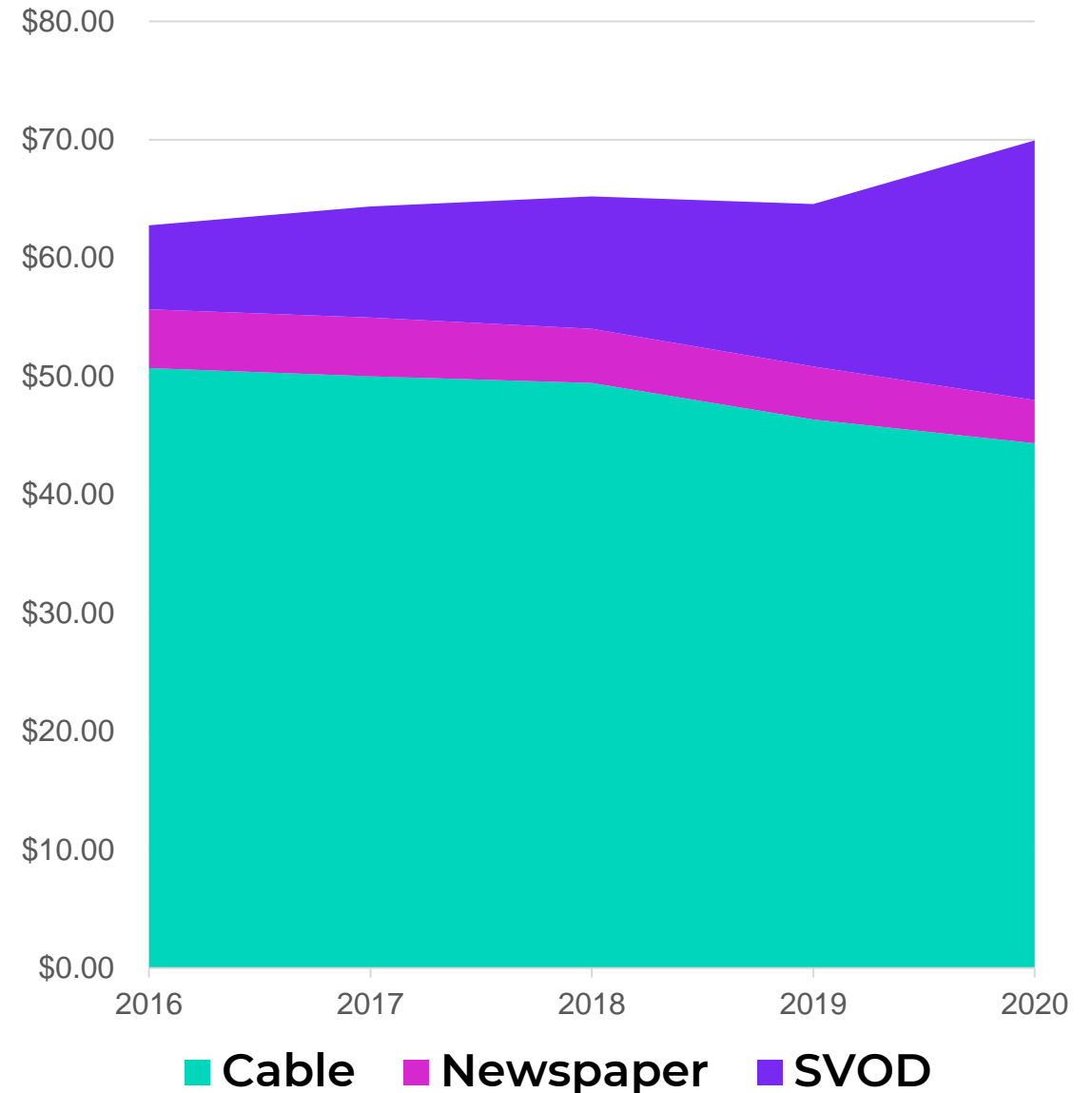
~\$70

Average monthly household expenditure on Cable, SVOD and Newspaper

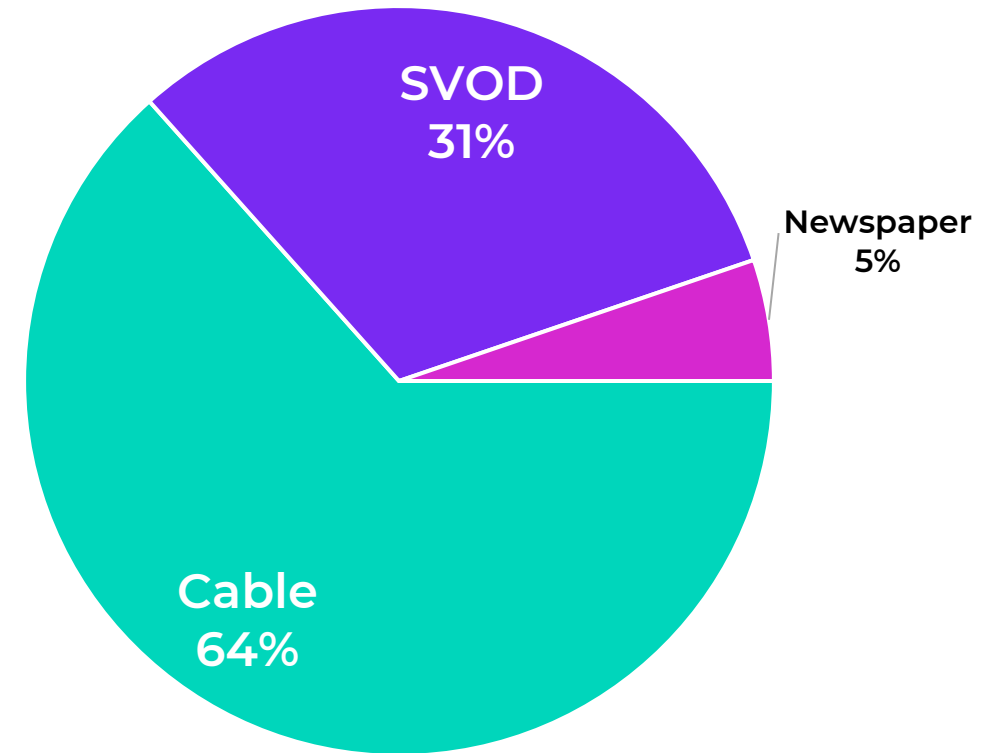
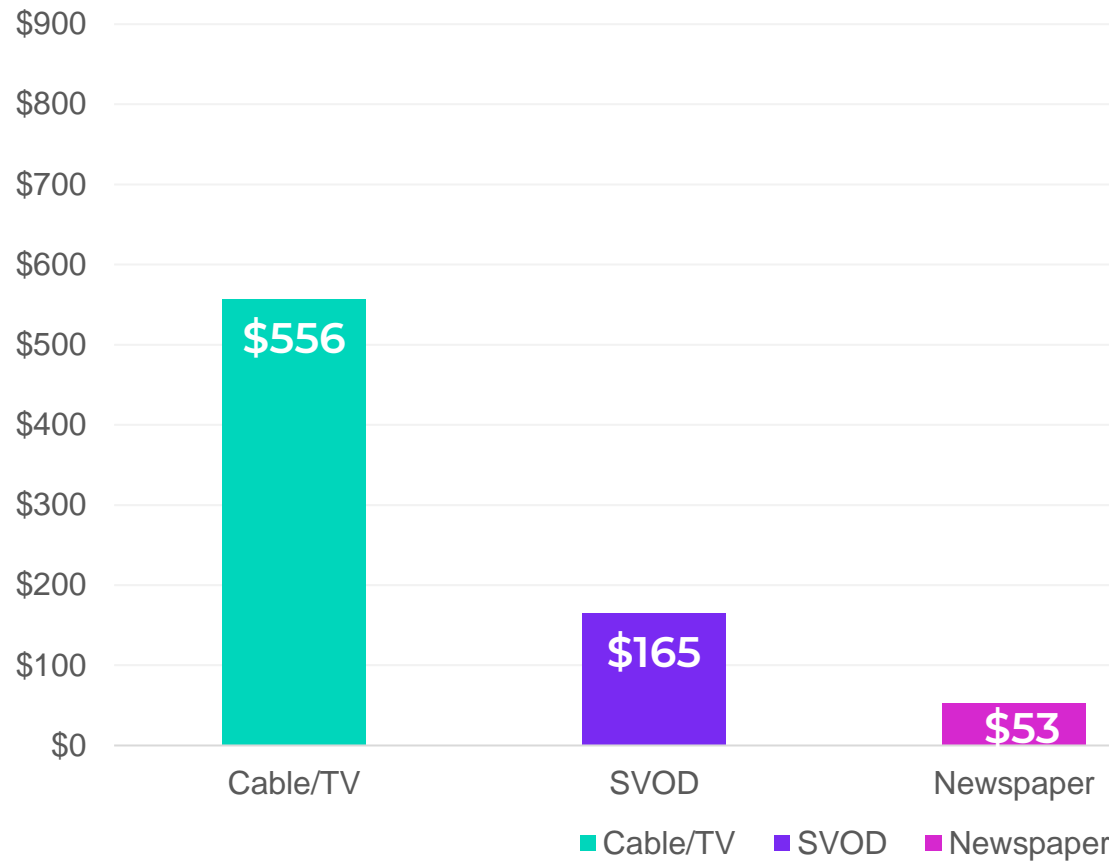
~8%

Increase vs 2019

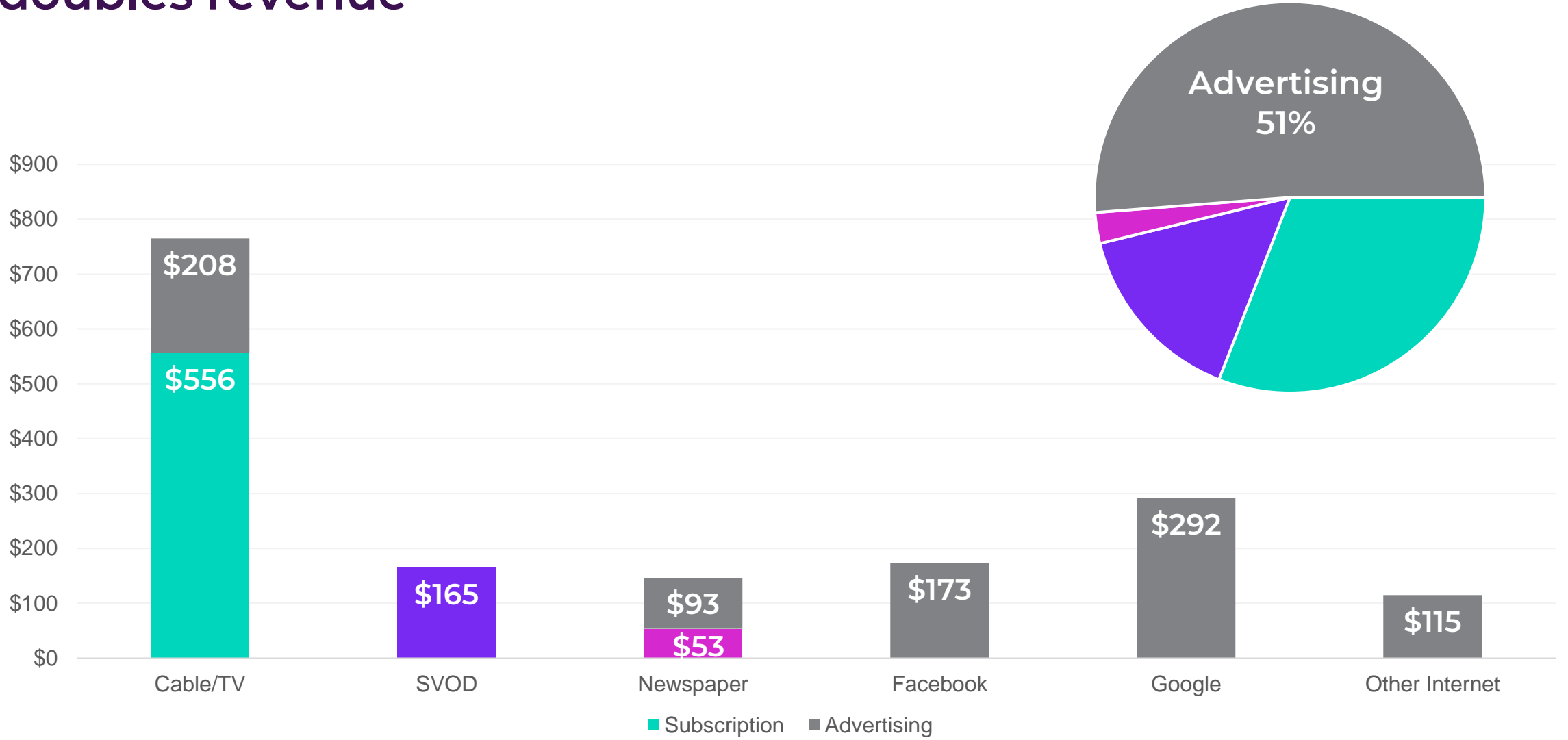
Estimated Subscription Costs per Canadian Household



# Video Services Dominate Annualized Share of Subscriptions



# Estimates suggest advertising doubles revenue





# The 'Consumer' Perspective

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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

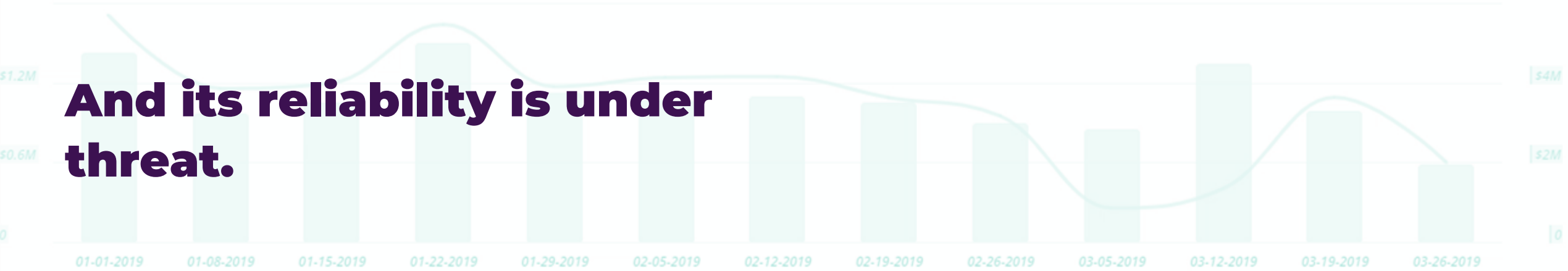


\$3.75  
Total ROI



**Reporting has become the most common marketing task<sup>1</sup>.**

**And its reliability is under threat.**



## 2 Channel Performance

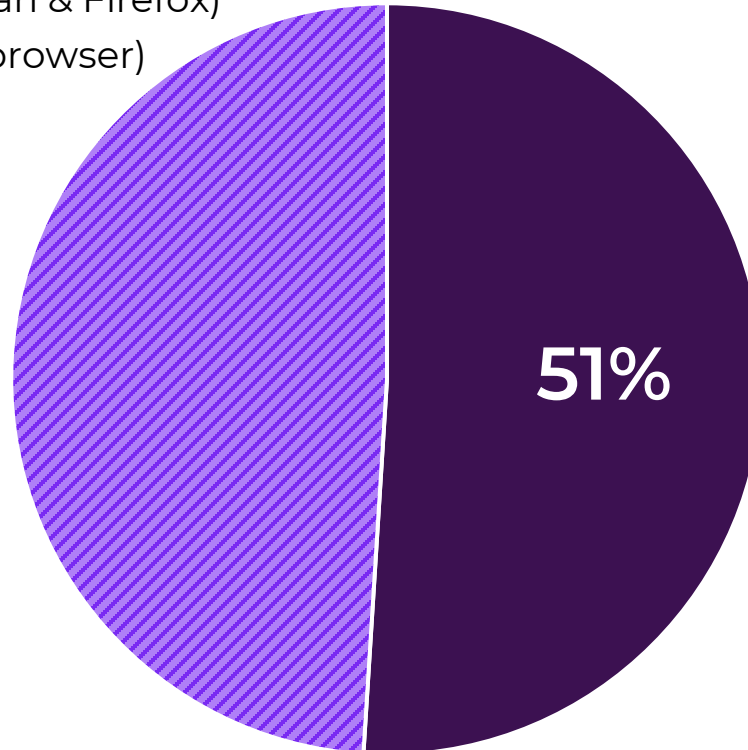
## 3 Paid Advertising

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

Select Channel

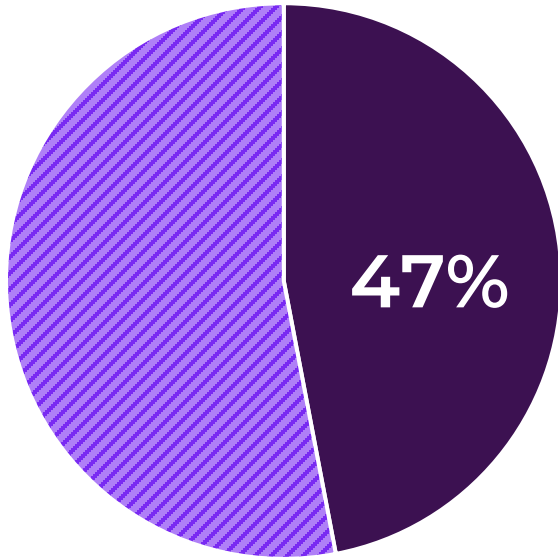
# The 'Attribution Gap' is big

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

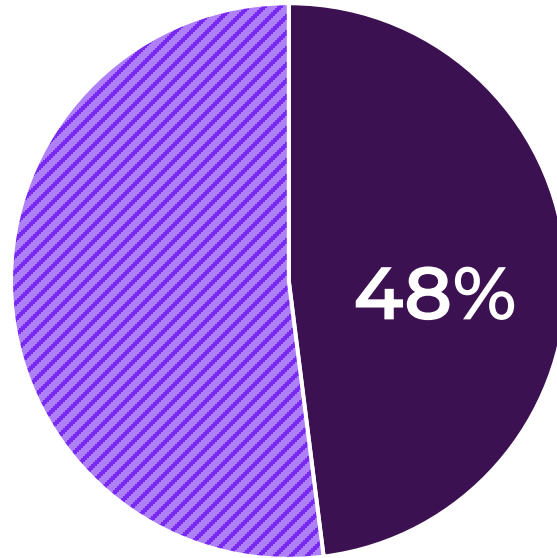


User Opt-In for App tracking (iOS)  
Cookie Data not currently blocked (Chrome)

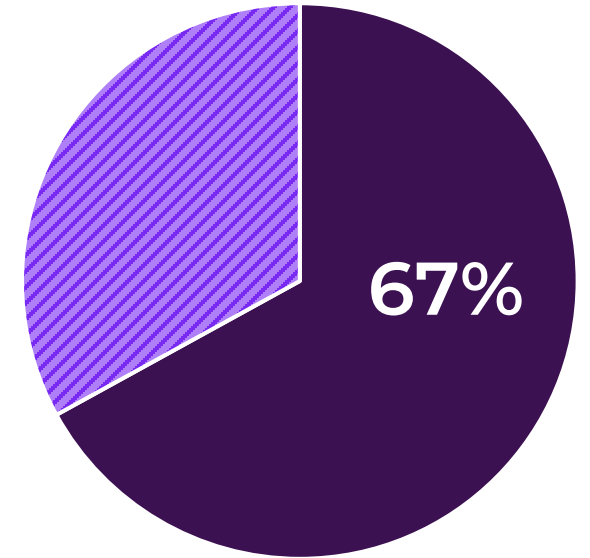
# With some variation across devices



Mobile



Computer

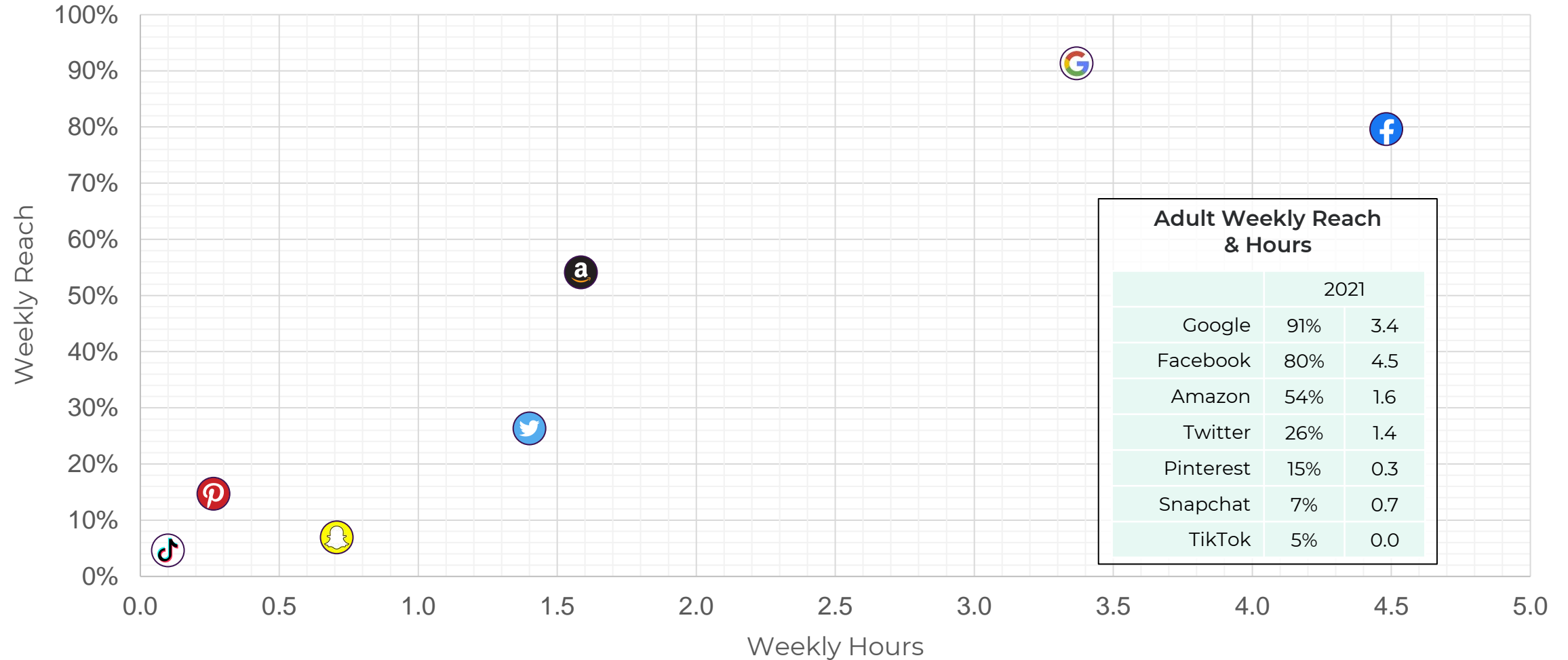


Tablet

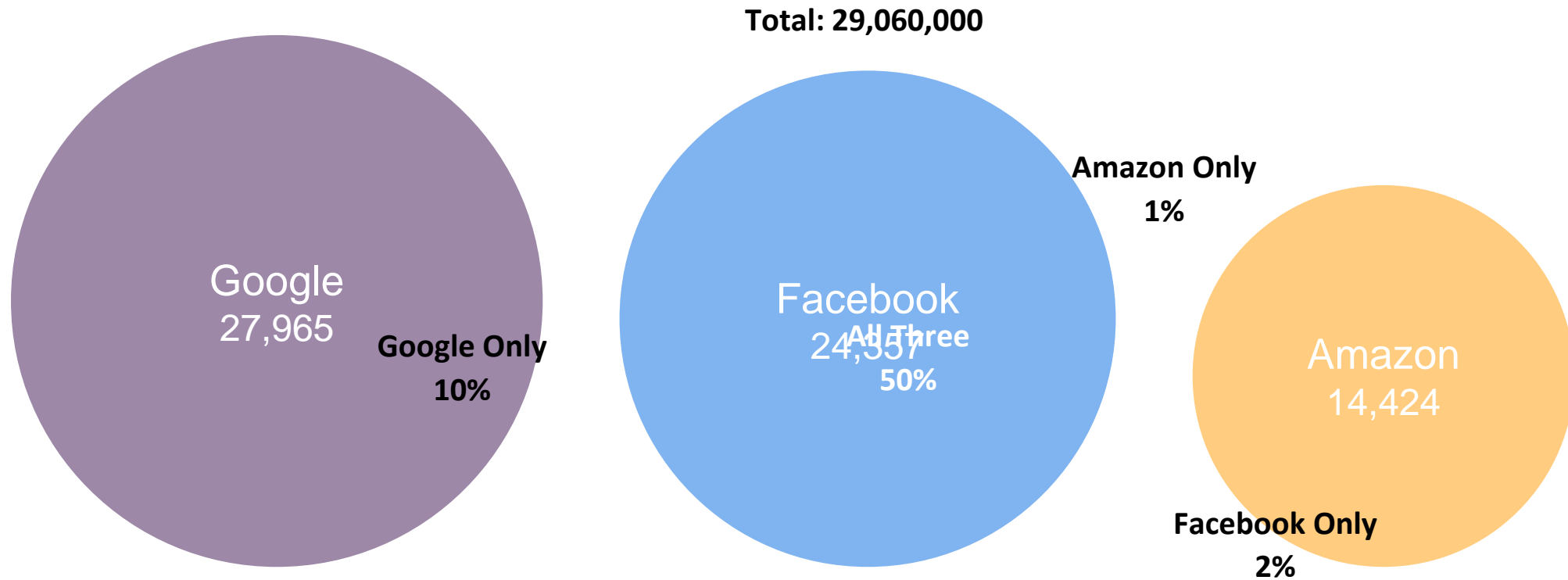


# Engineered Serendipity

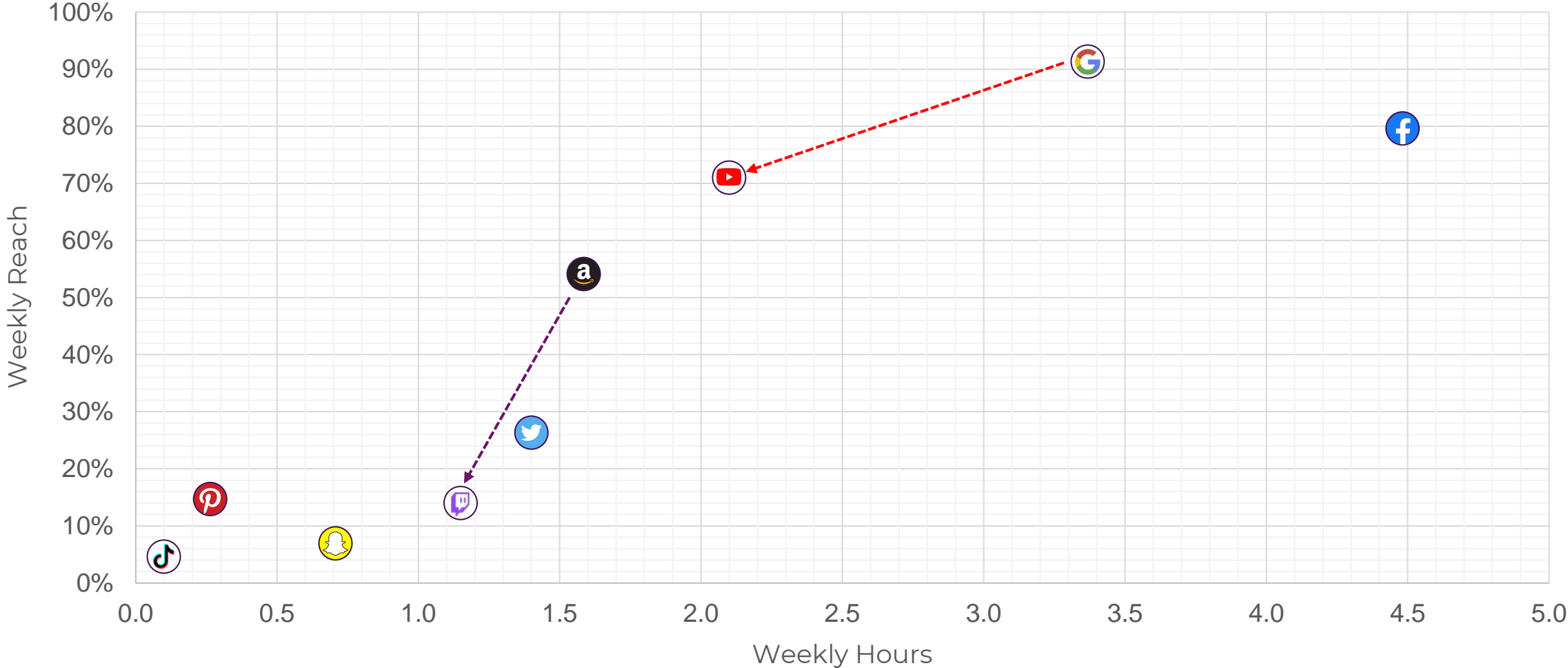
# Walled Garden Reach & Time



Source: Vividata Metrica Summer 2021, A18+

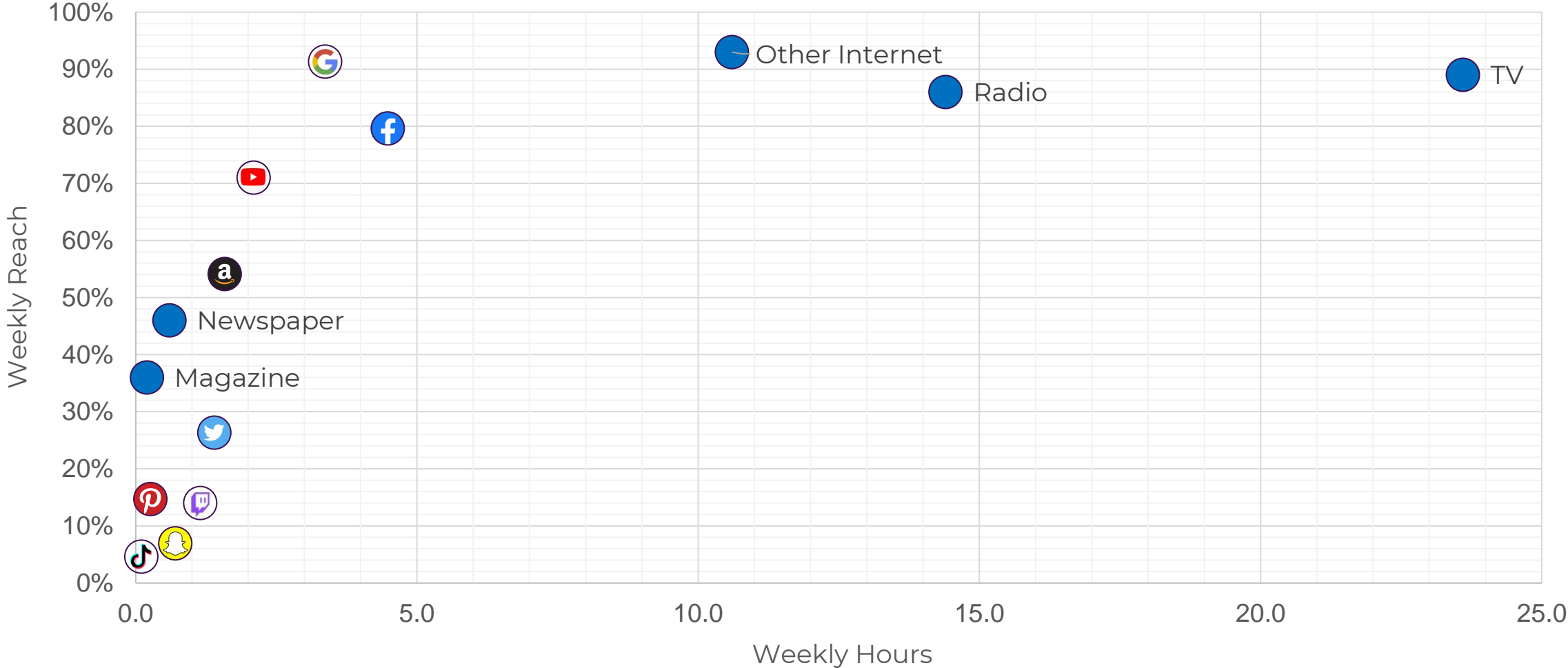


# The 'media time' in the Walled Gardens



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**

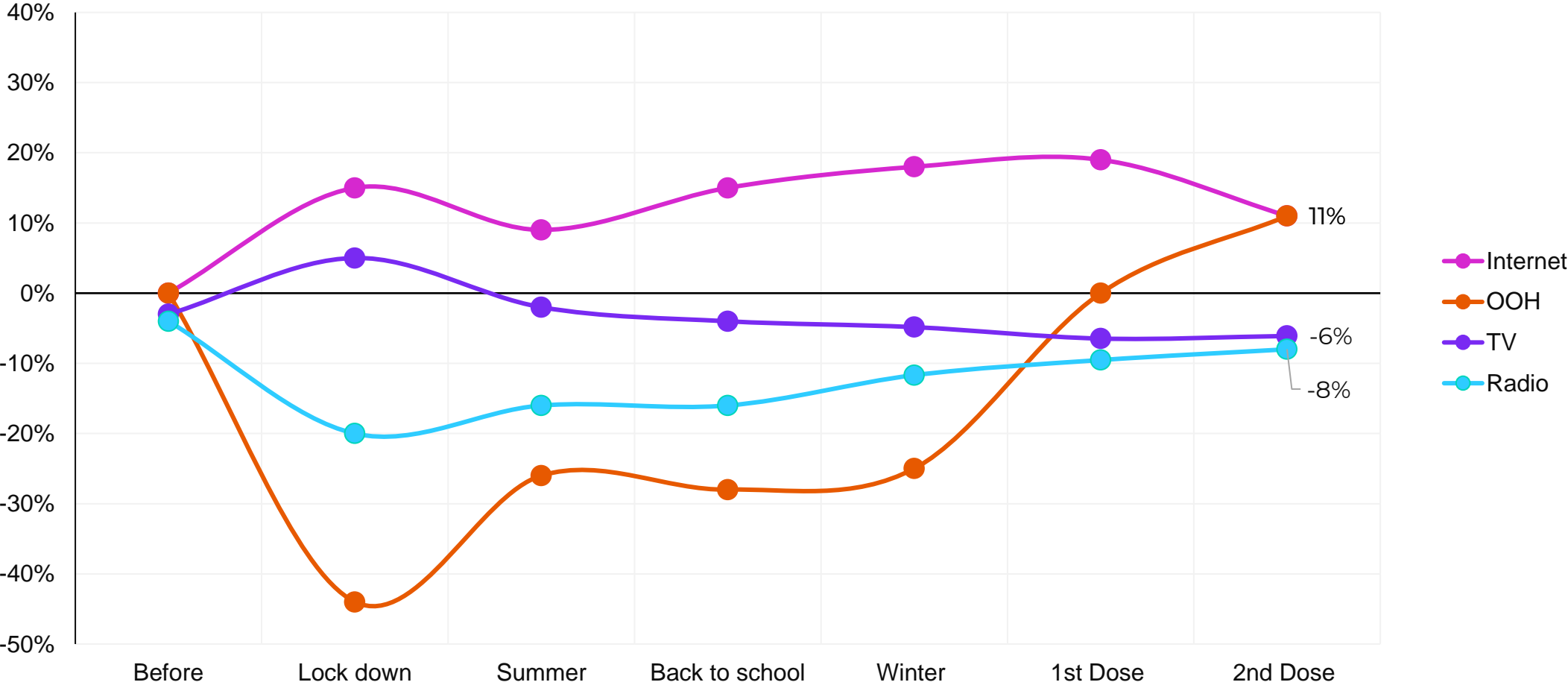
**Panel - based  
Measurement**

**Brand & Business  
Reporting**



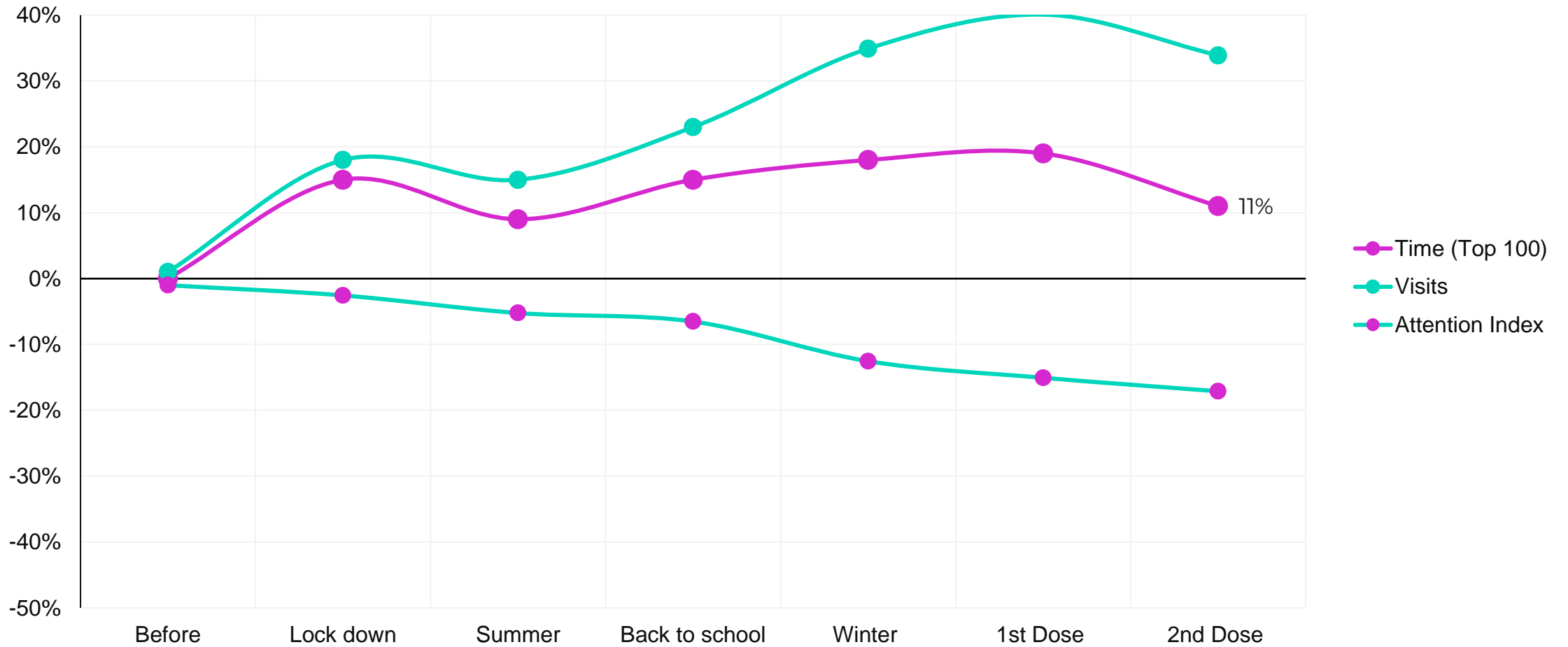
# Shallow Living

# The COVID effect on time

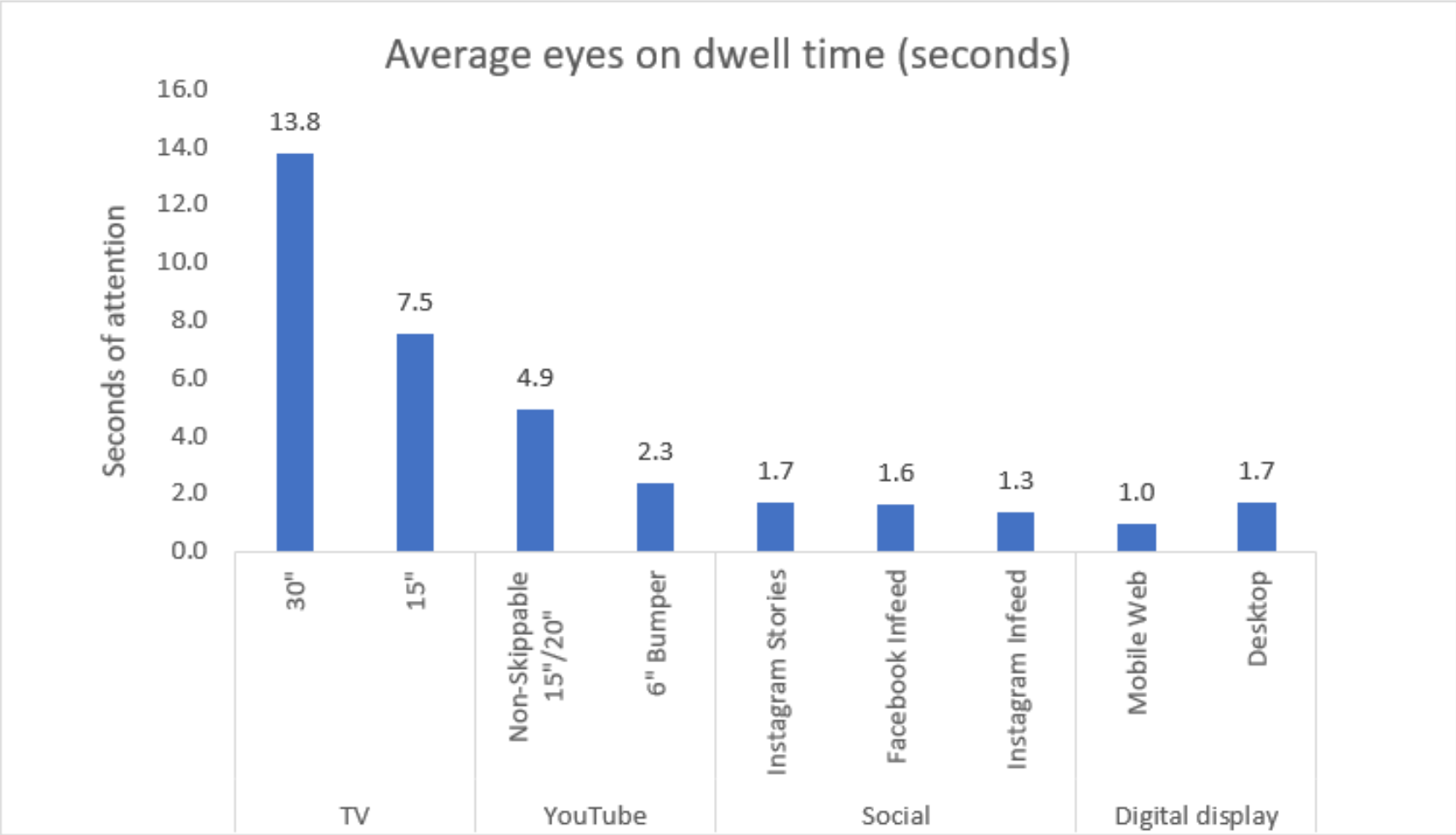


Sources: Numeris PPM TV & Radio AvHrsWk (Cap); OOH Pattison Outdoor Furthest range of movement (KM); AvHrsWk (Cap) Internet SimilarWeb & PHD Estimates from multiple sources

# The COVID effect on attention?



# Ad attention is already shallower

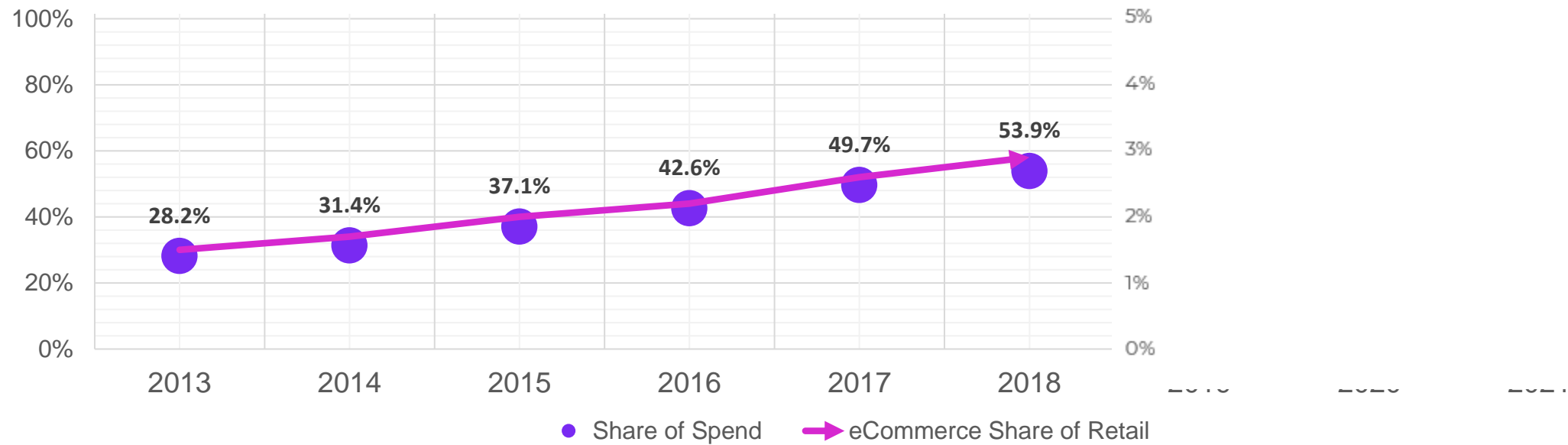


A person is seen from behind, holding a smartphone. The background is dark with a laptop and bokeh lights. A purple banner is at the bottom.

# Digital Commerce

# Digital ad growth tightly linked to Digital Commerce

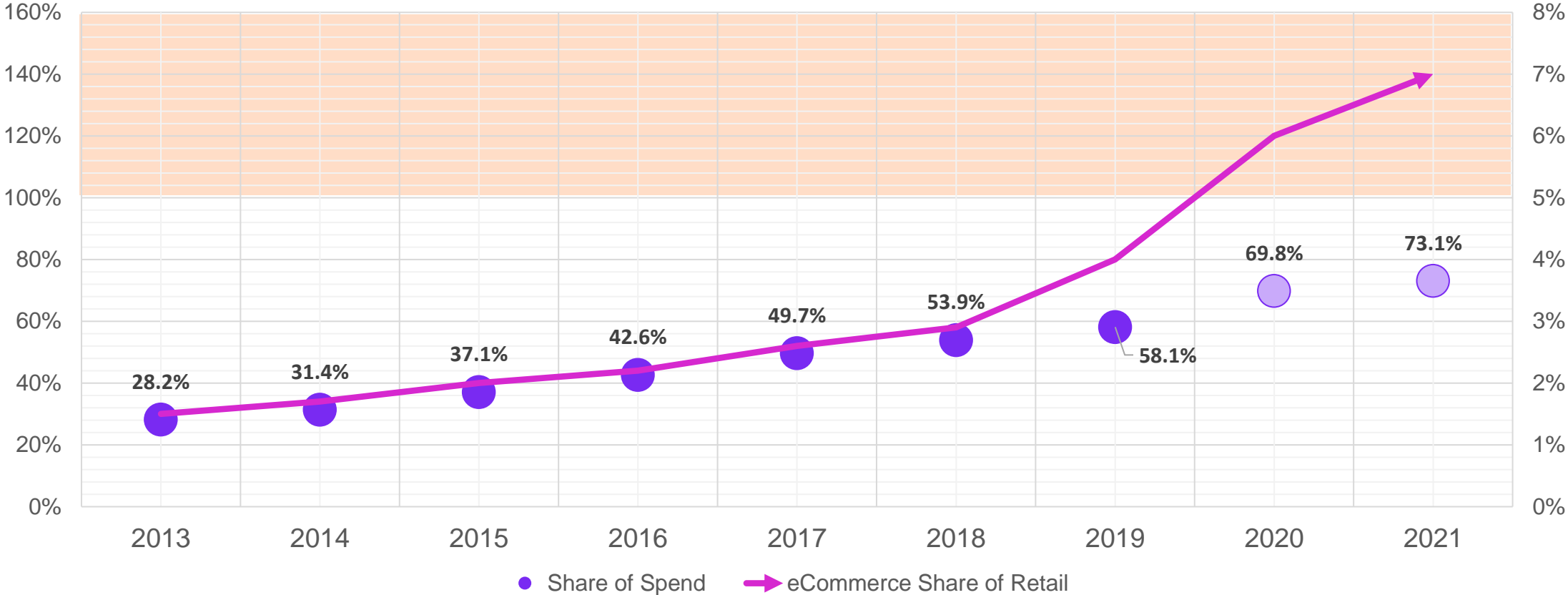
Internet Share of Spend vs eCommerce Share of Retail



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

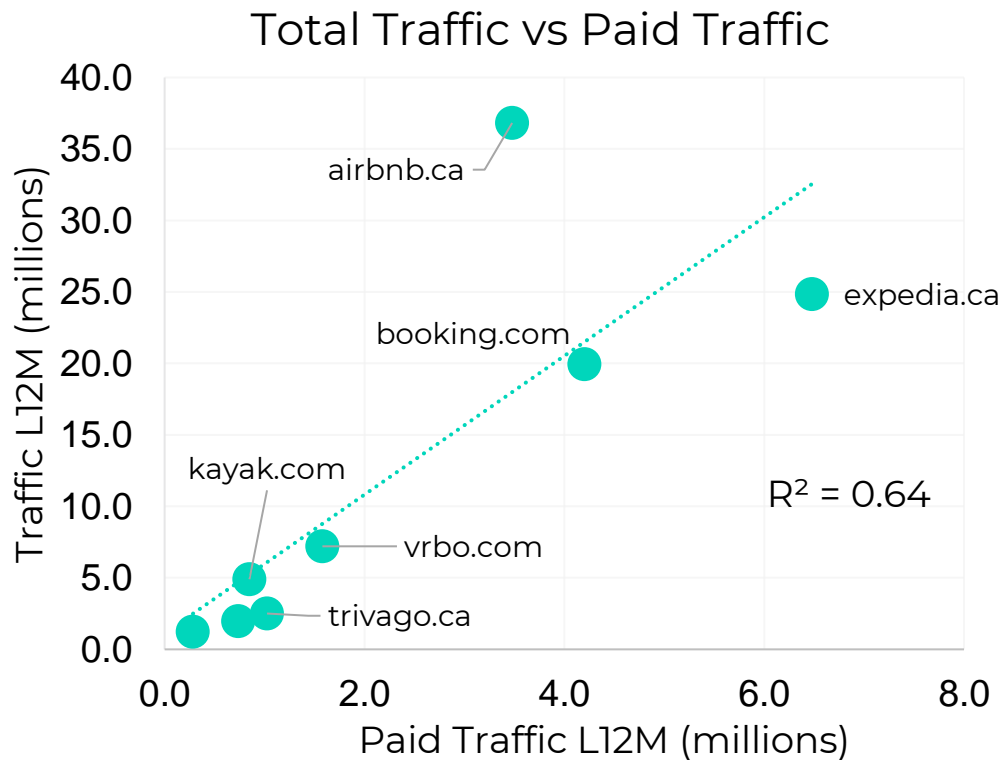
# As Digital Commerce accelerates, the pressure mounts

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

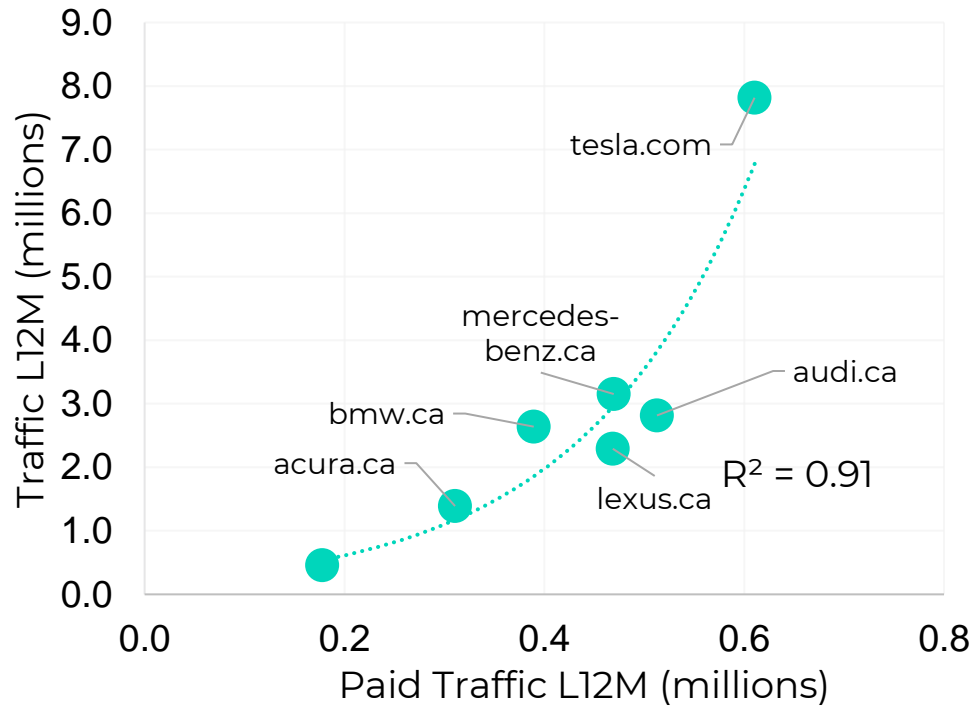
The **biggest websites** tend to get the **most traffic from paid sources**



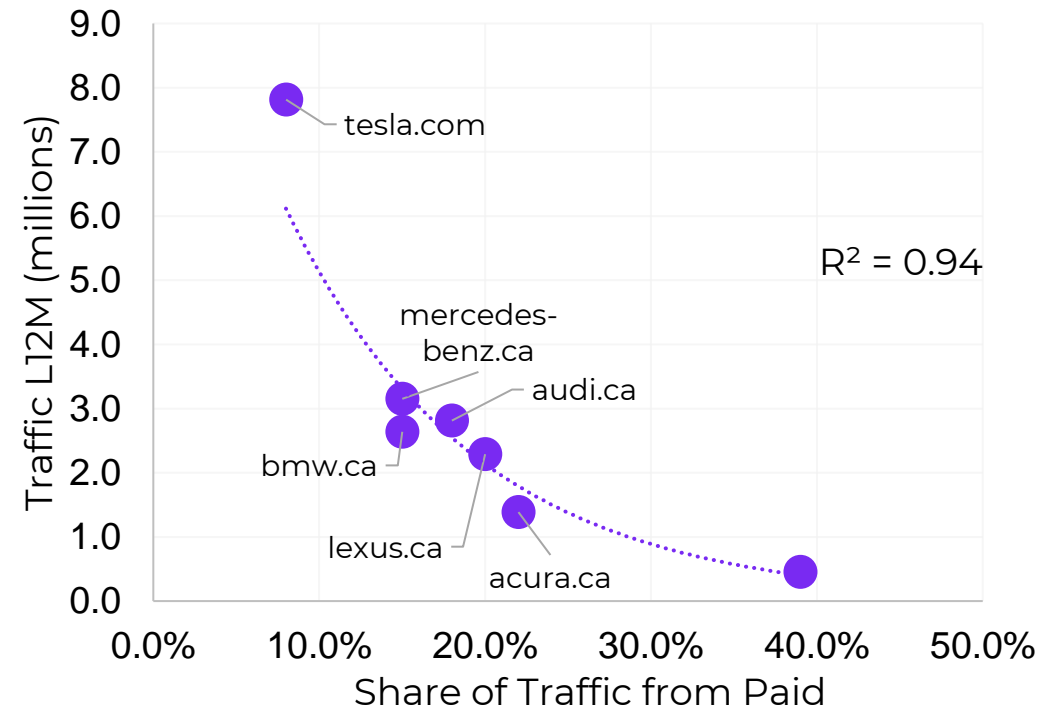
# A Digital Media Paradox

# Luxury Cars

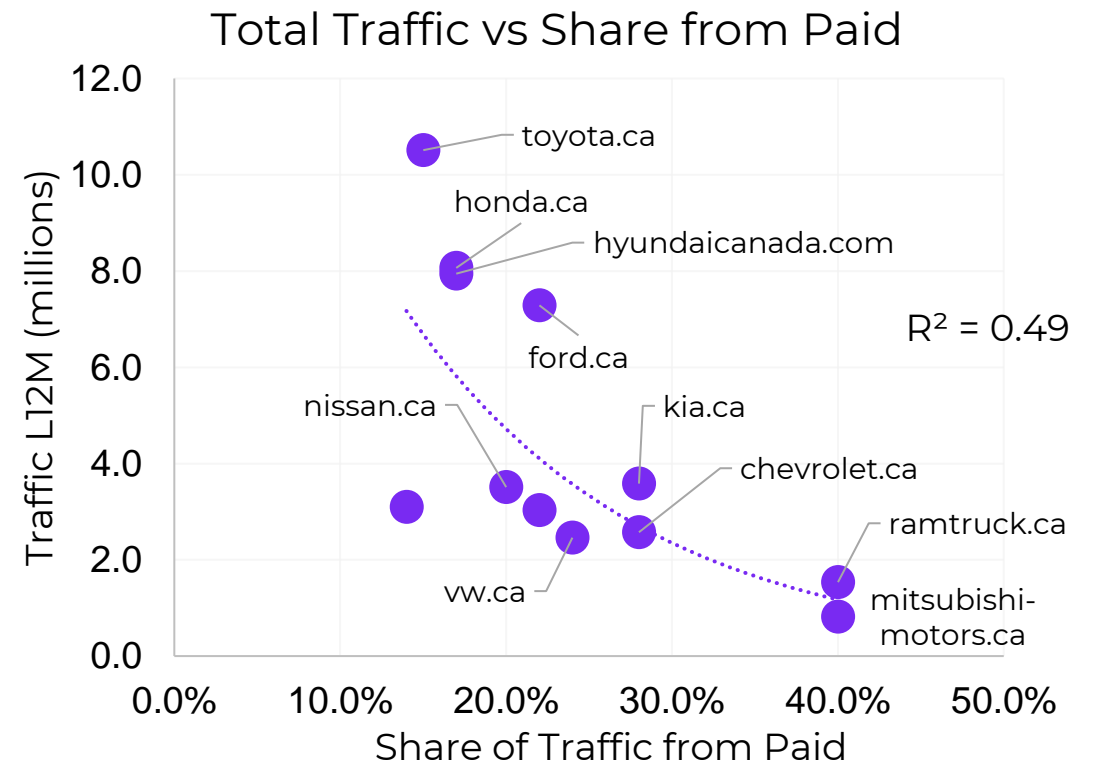
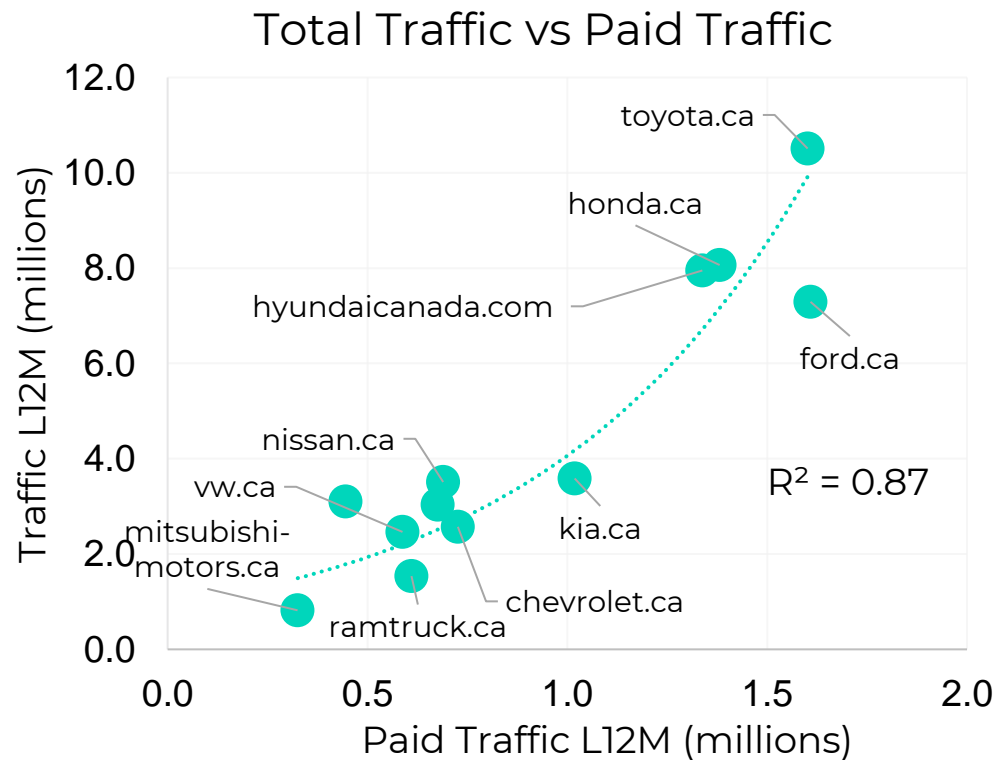
### Total Traffic vs Paid Traffic



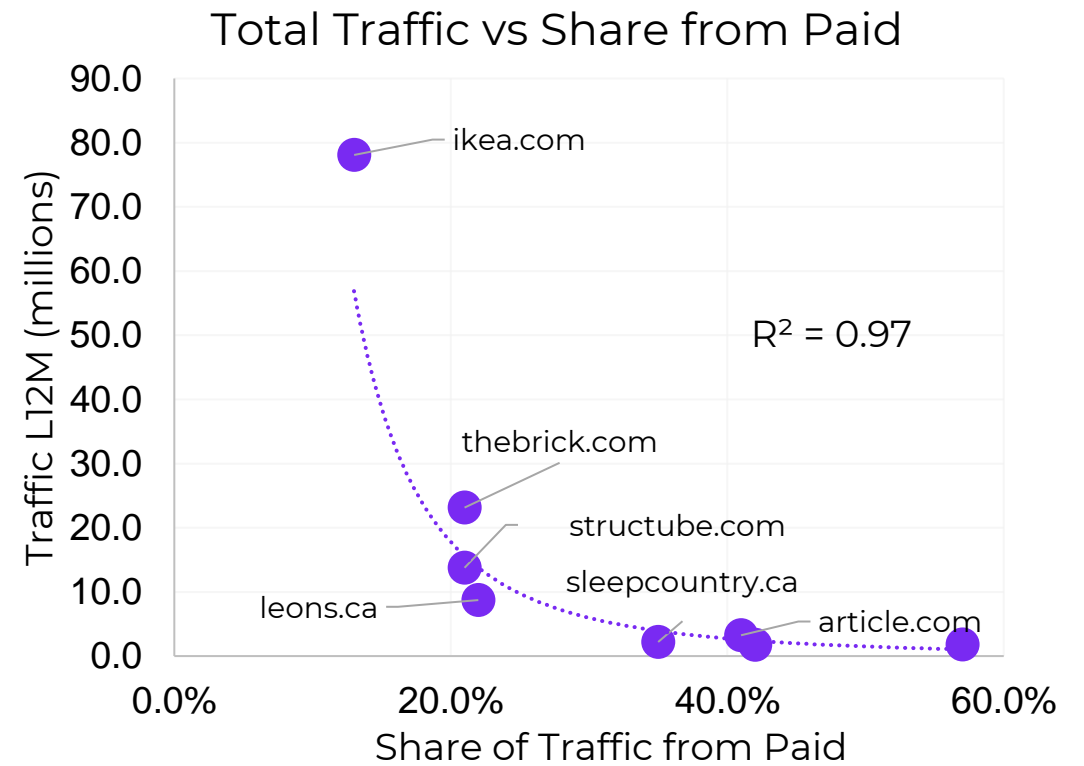
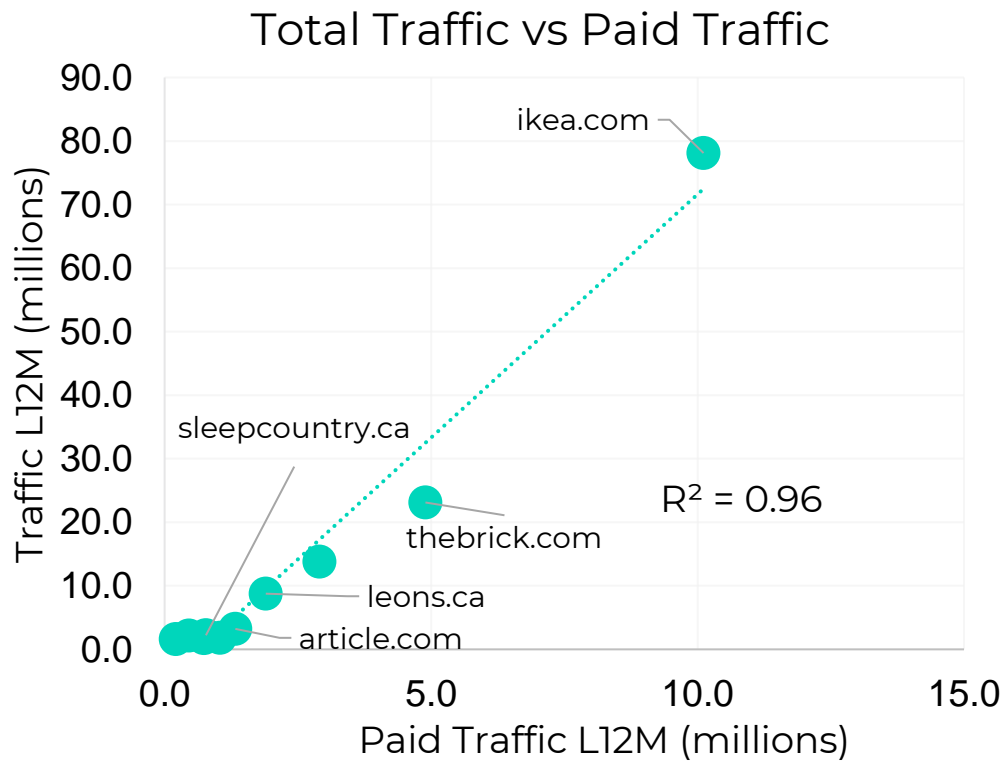
### Total Traffic vs Share from Paid



# Mass Market Cars

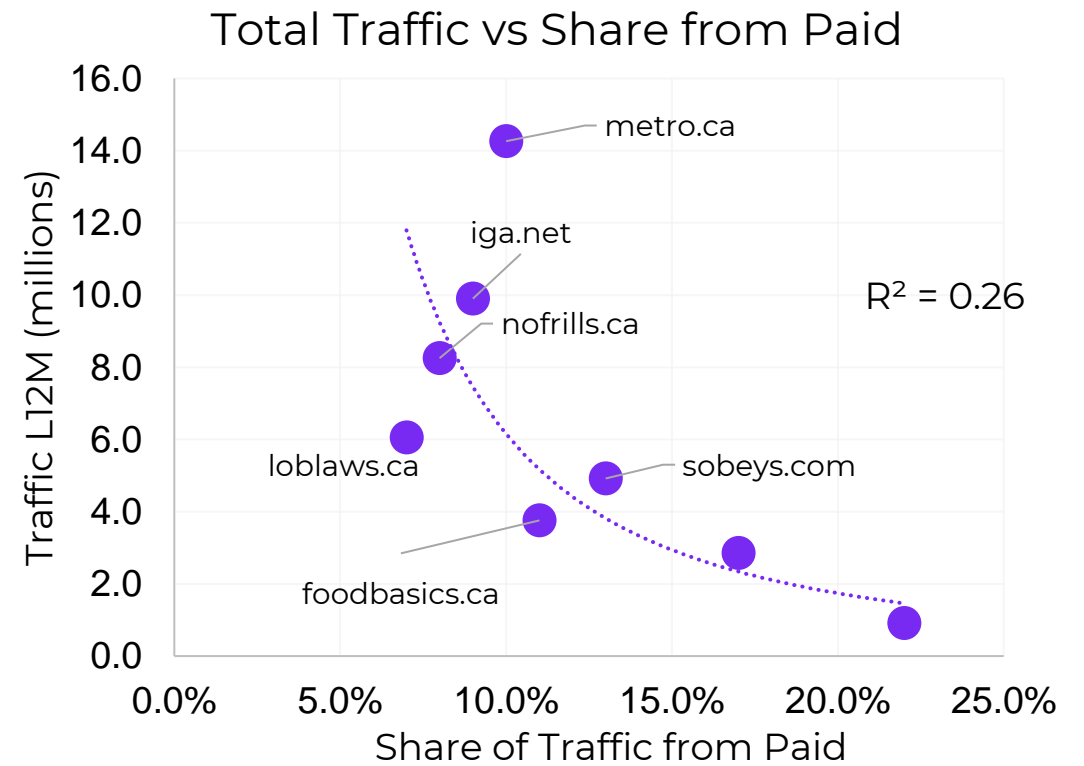
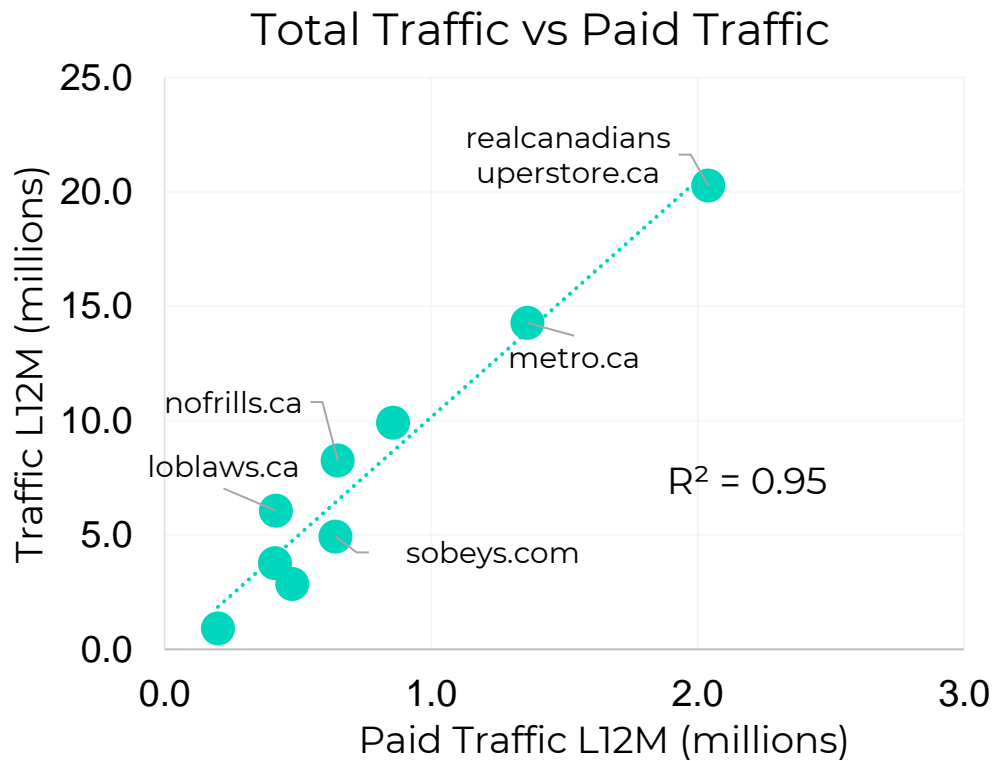


# Furniture Stores



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

# Grocery Stores



**“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





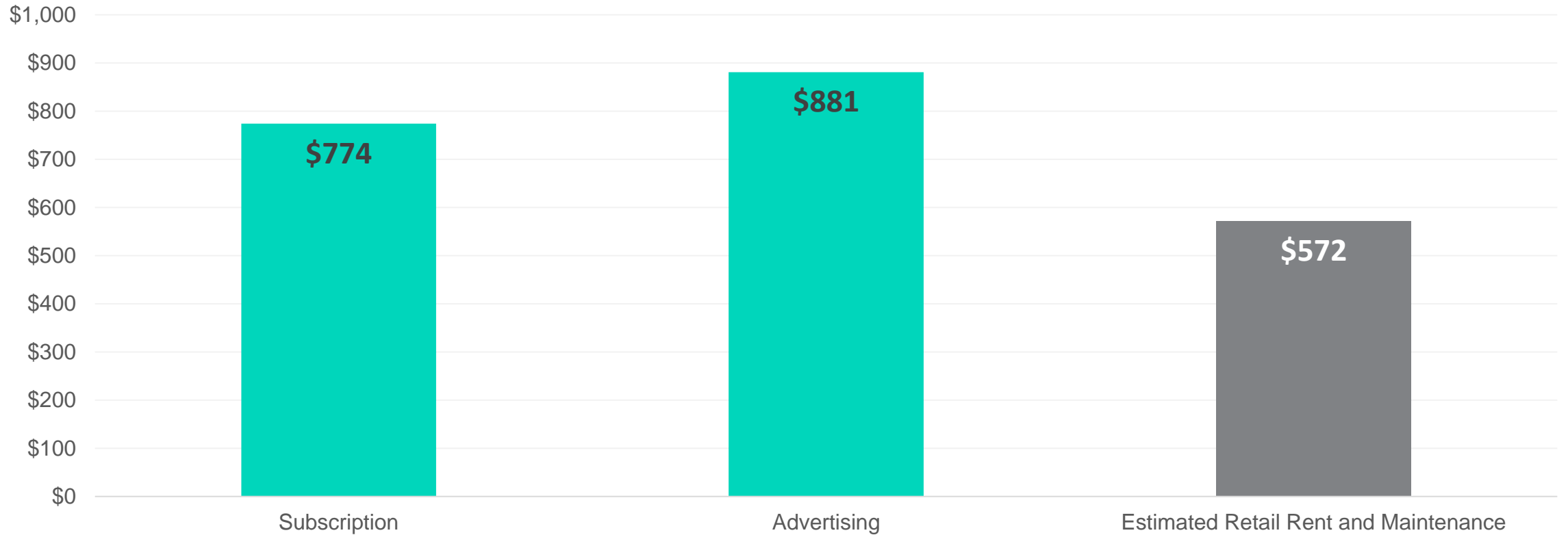
**Mental  
Availability**

**Digital  
Availability**

**Physical  
Availability**

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

Estimated Annual 'Total Cost per Household'





# Purpose Pervasion



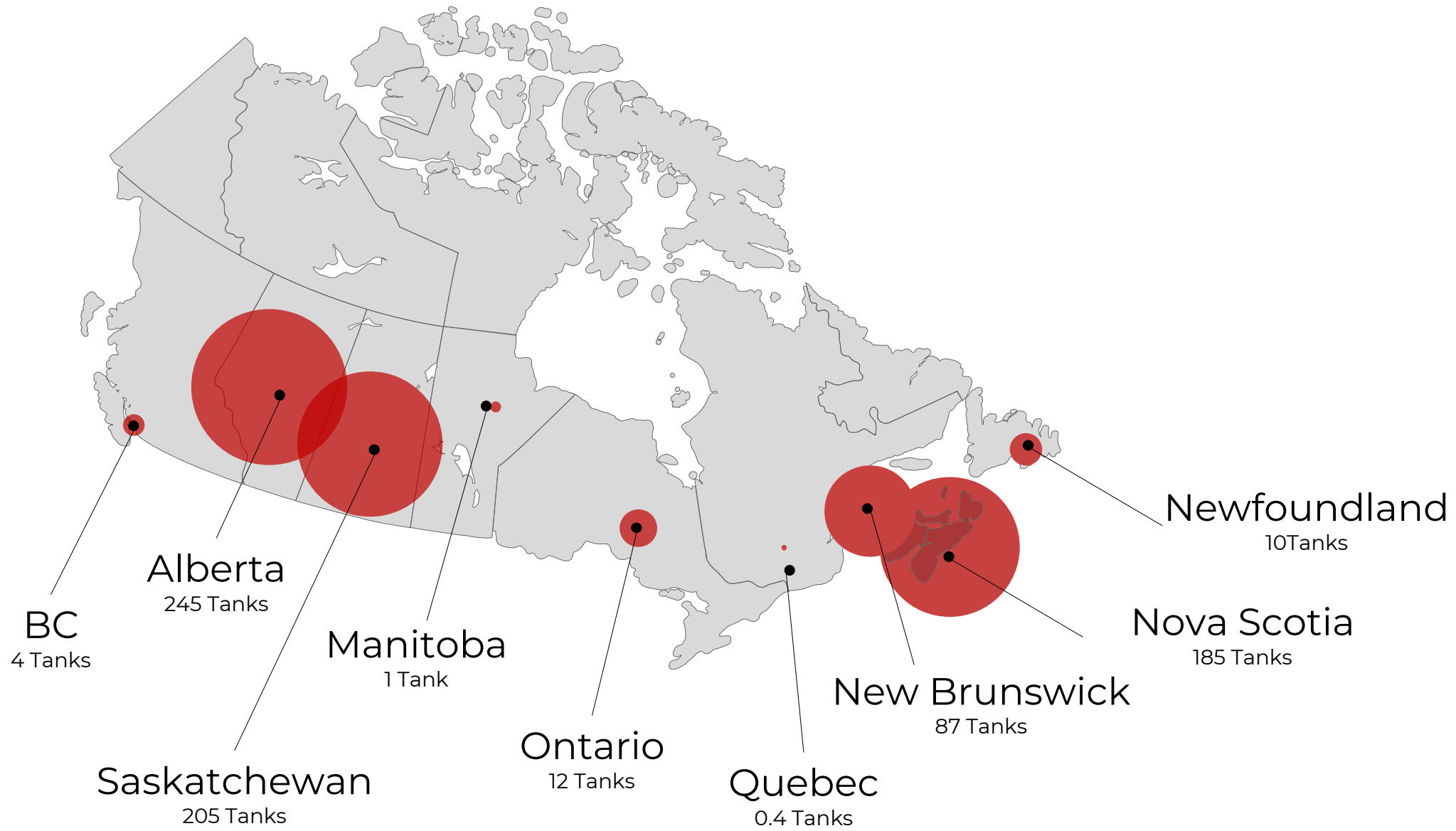
# Estimated Carbon Footprint of 10 million:

Video Impressions = ~47 tanks



Display Impressions = ~9 tanks





**28%**

of emissions in the  
UK from advertising-  
created demand



# The 'Consumer' Perspective

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# The Industry Perspective

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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

**Easier to  
Buy**

**Easier to  
Measure**

**Easier to  
Value**

**Canadian  
BIPOC**

**Cross Media**

**Attention &  
Marketing  
Accountability**

**Identity**

A person in a dark jacket stands on a rocky outcrop, looking out at a vast, starry night sky. The scene is illuminated with a blue and purple color palette, creating a serene and contemplative atmosphere. The stars are scattered across the dark sky, with some appearing as bright, distinct points of light.

# CMUST

# 2021

Canadian Media Usage Study 2021

30 November 2021

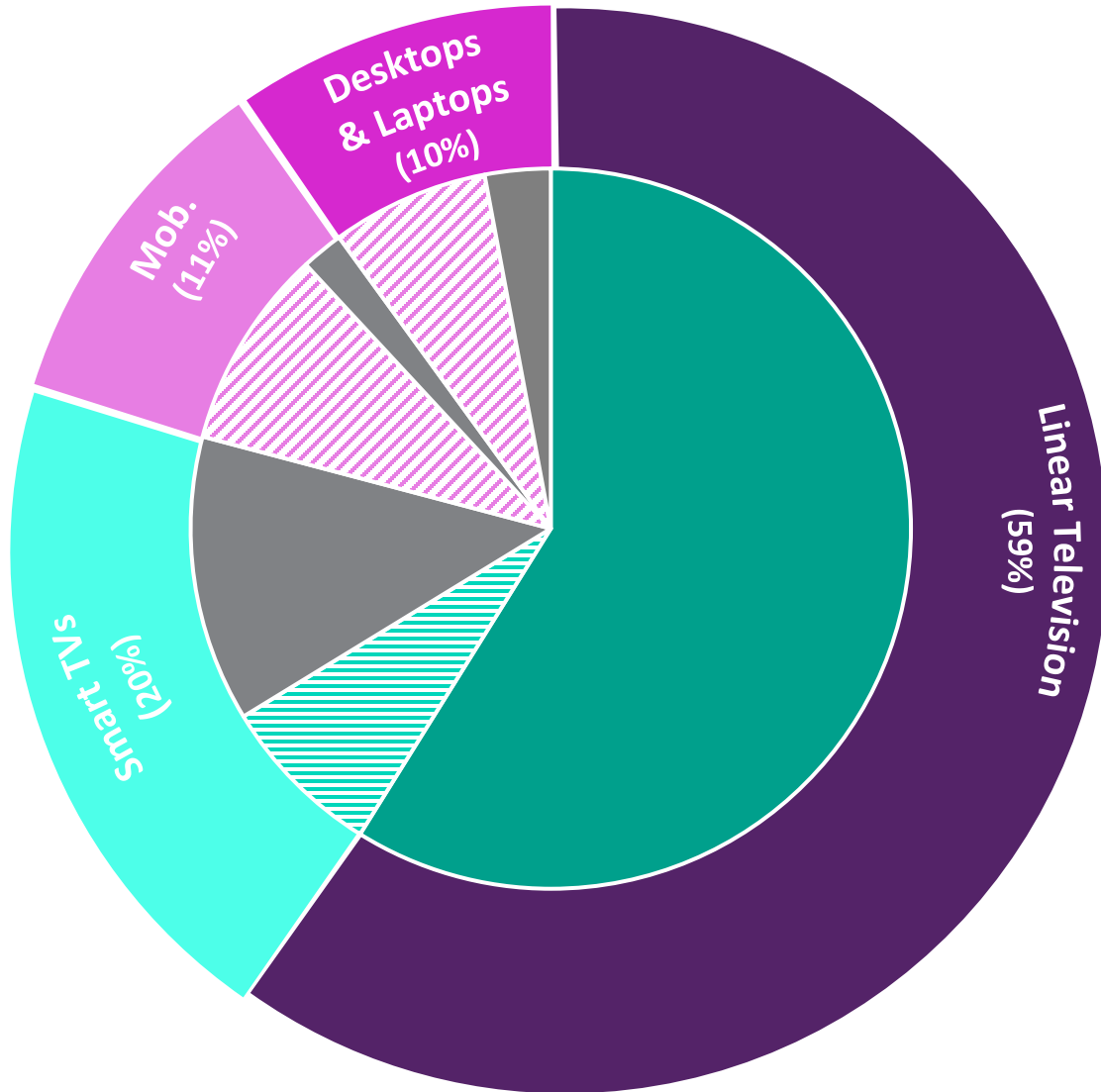
phd

# Sources

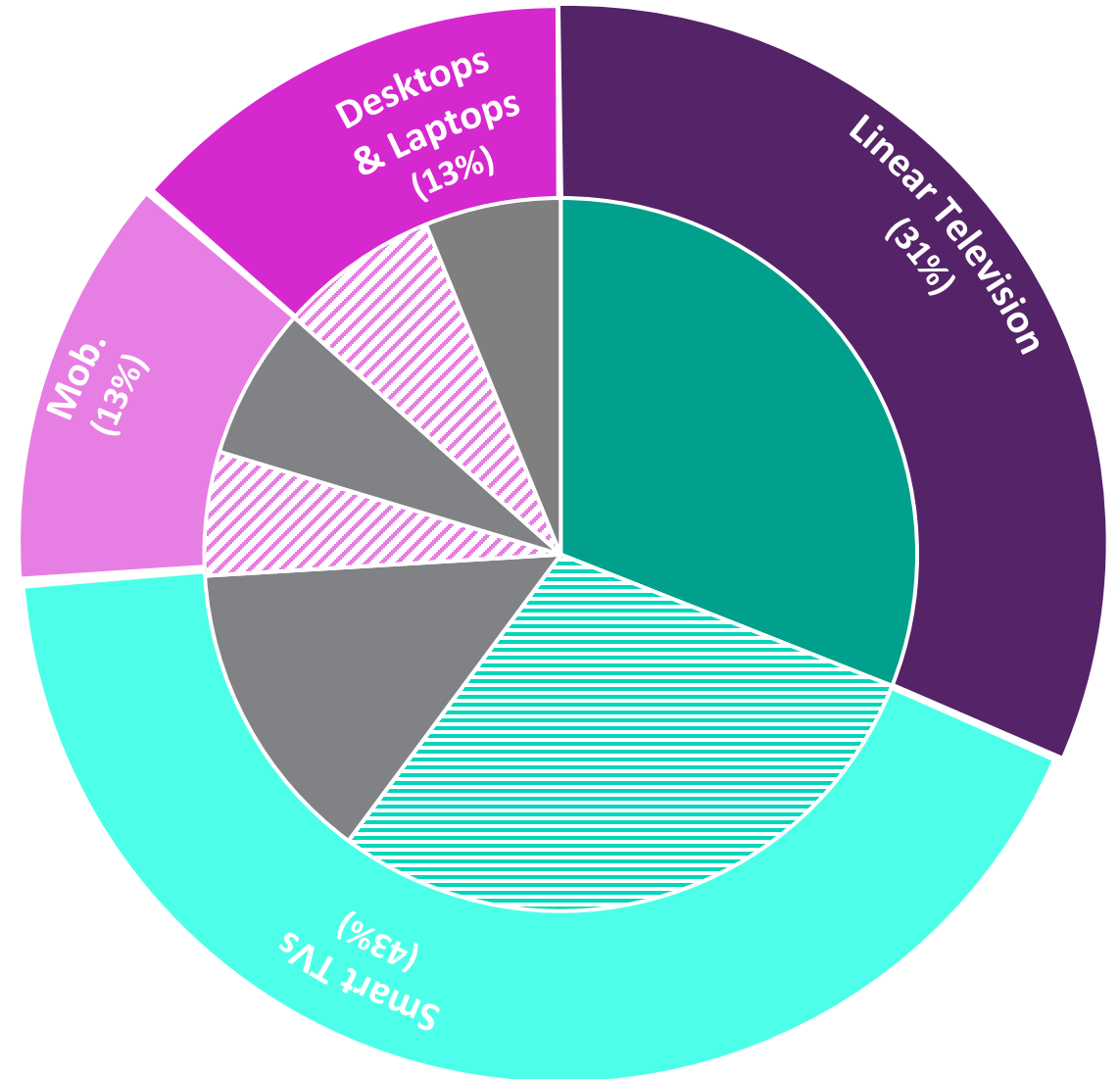
Device penetration	MTM Fall 2020/ Spring 2021 unless indicated otherwise as PHD estimated.
TV weekly time/reach, 2020	Numeris, Fall'20/Spring'21 PPM averaged.
Radio weekly time/reach , 2020	Numeris, Fall'20, Diary
Internet weekly time/reach , 2020	Vividata Spring 2021
Magazine weekly time/reach , 2020	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





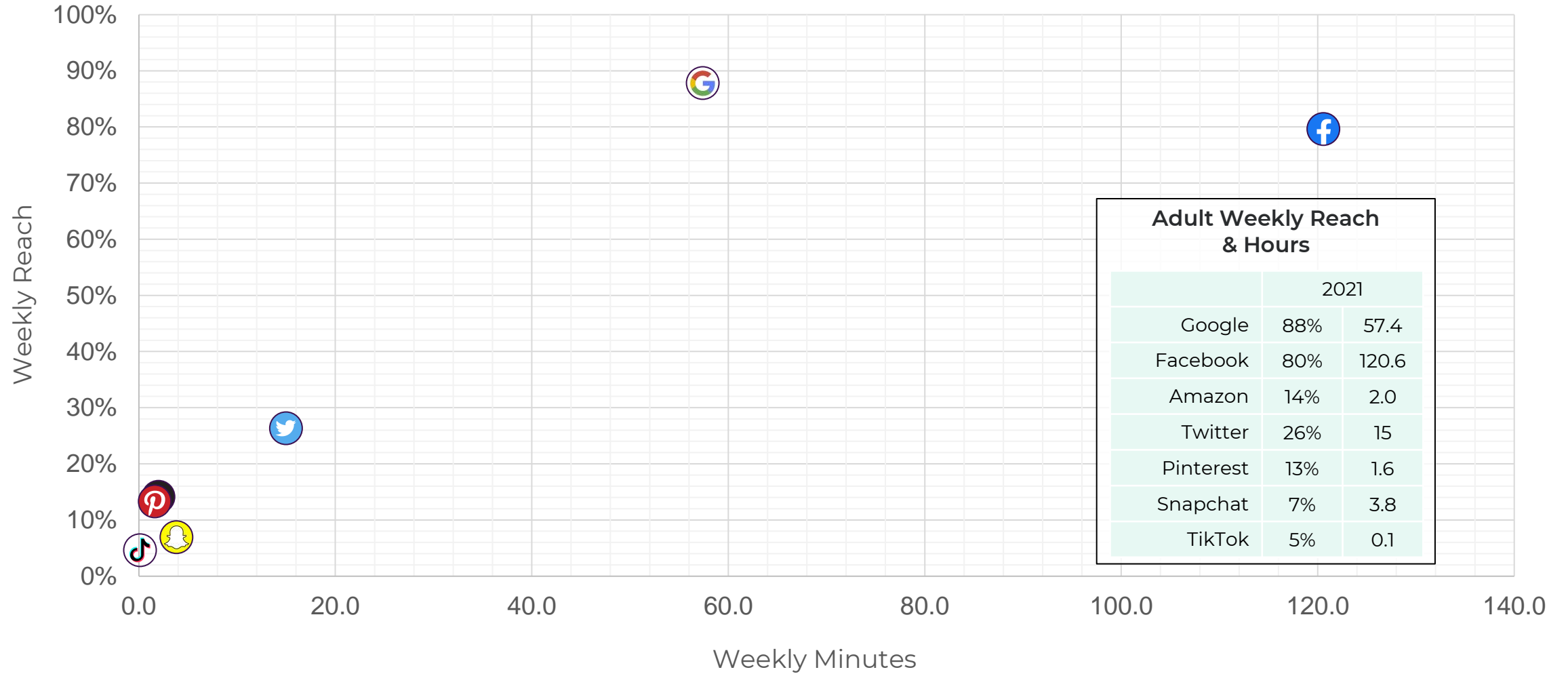
The background image cannot be pasted straight onto the slide otherwise some elements will not appear.

To add the background image:

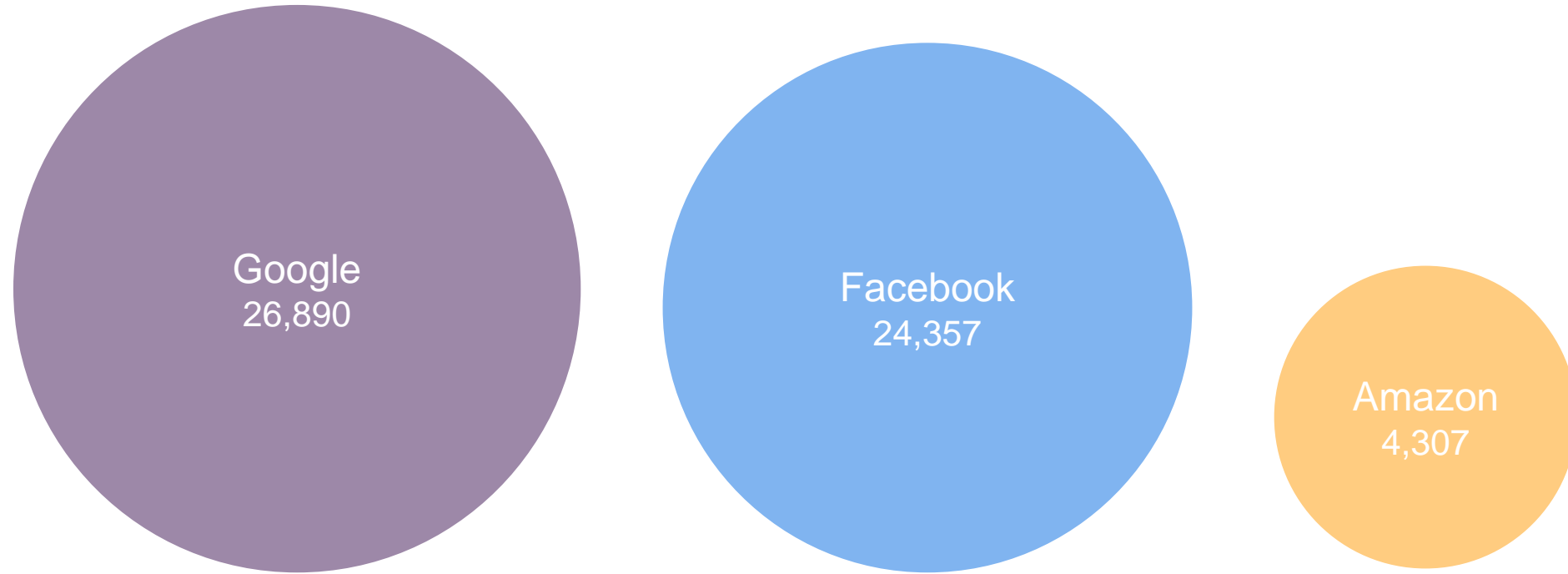
- Right click to activate the menu
- Select {Format Background}
- A dialogue box will appear
- Click the option {Picture or texture fill}
- Select {Insert from file}
- Locate the image and click {Insert}

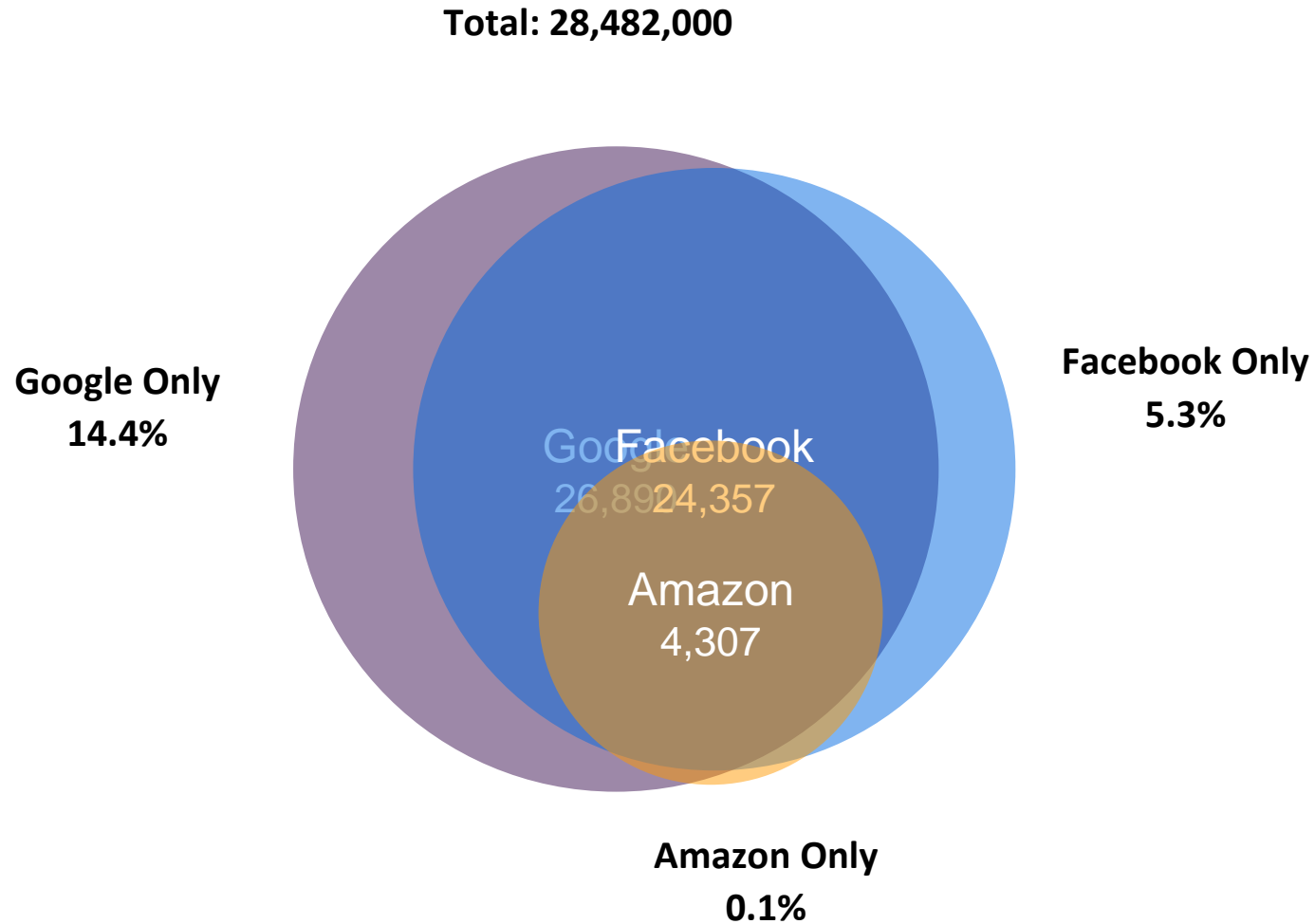
phd

[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
<b>Amazon AND FB AND Google</b>	<b>3,896</b>
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