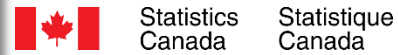




CMUST

(Canadian Media Usage Study)

2023



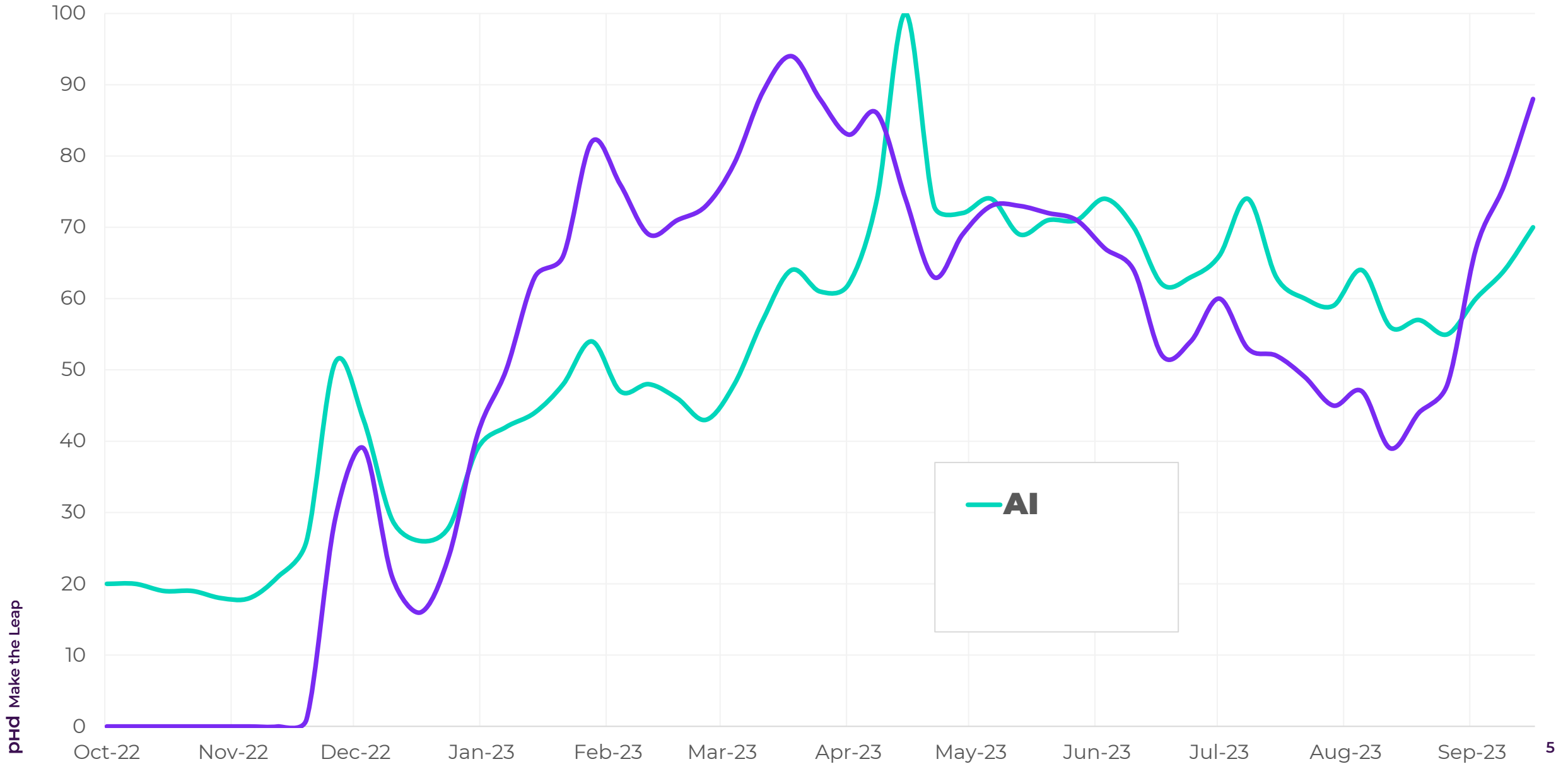
2023

was the year

AI became famous



AI-Related Searches







**Scheduled
Intuition**

**Finite
Content**

**Collective
Experience**

Art



**Responsive
Algorithm**

**Infinite
Content**

**Individual
Experience**

Math



1/2

of media time is spent with
algorithmically responsive
content



2/3

of advertising is
transacted algorithmically.



**THE
EXTENDED
MIND**

The Power of
Thinking Outside
the Brain

ANNIE MURPHY PAUL

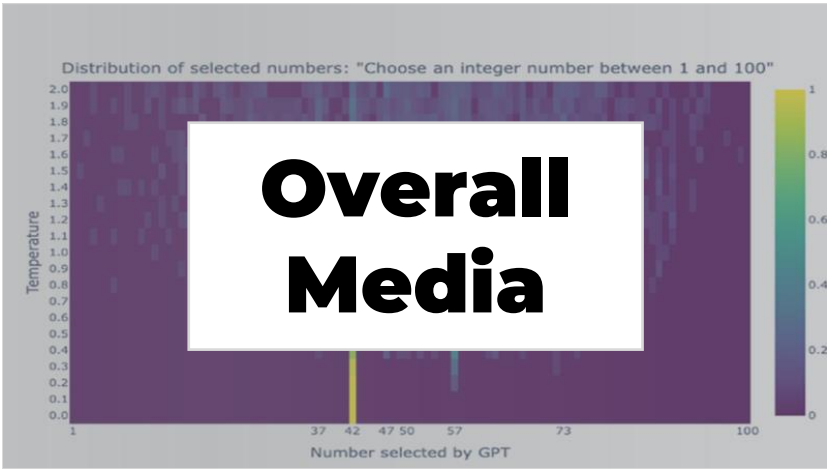
It's the stuff *outside*
your head that
makes you smart.

The Extended Mind

by Annie Murphy Paul

ON SALE NOW!

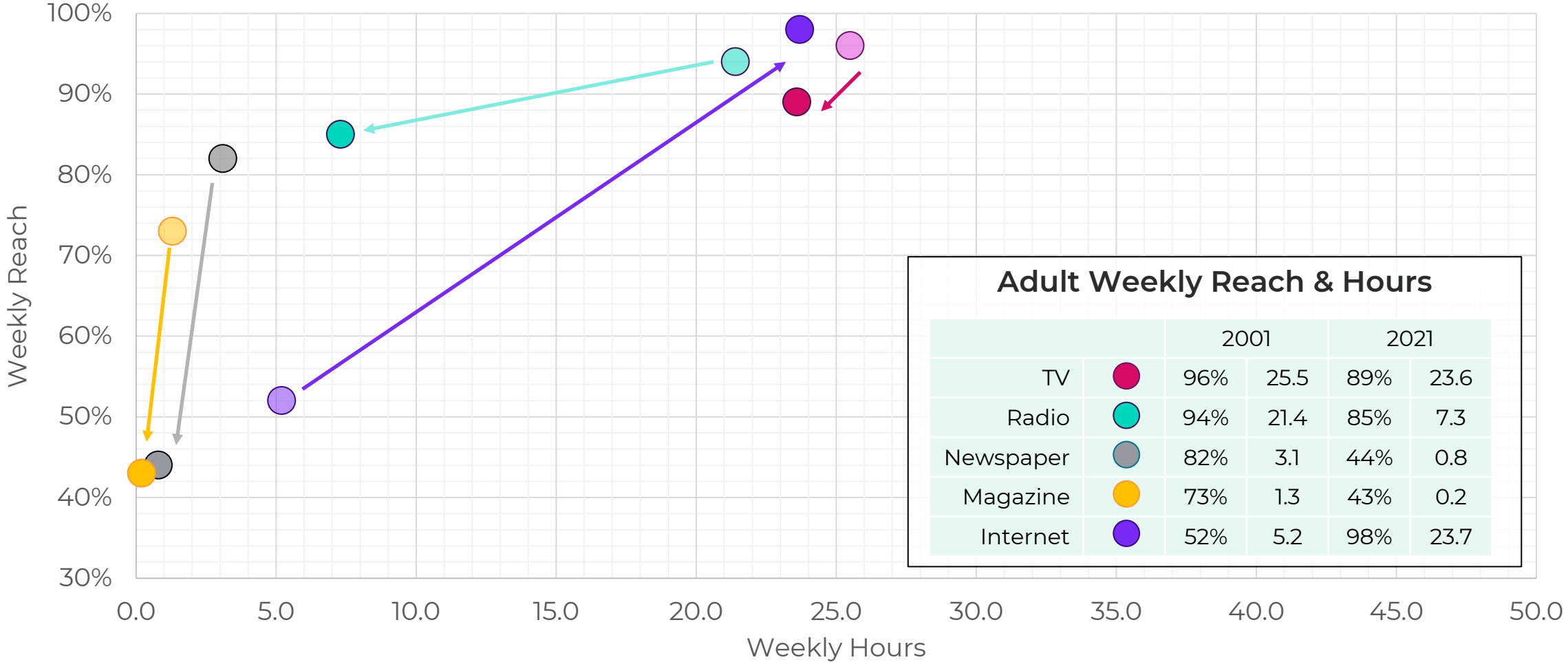
www.AnnieMurphyPaul.com



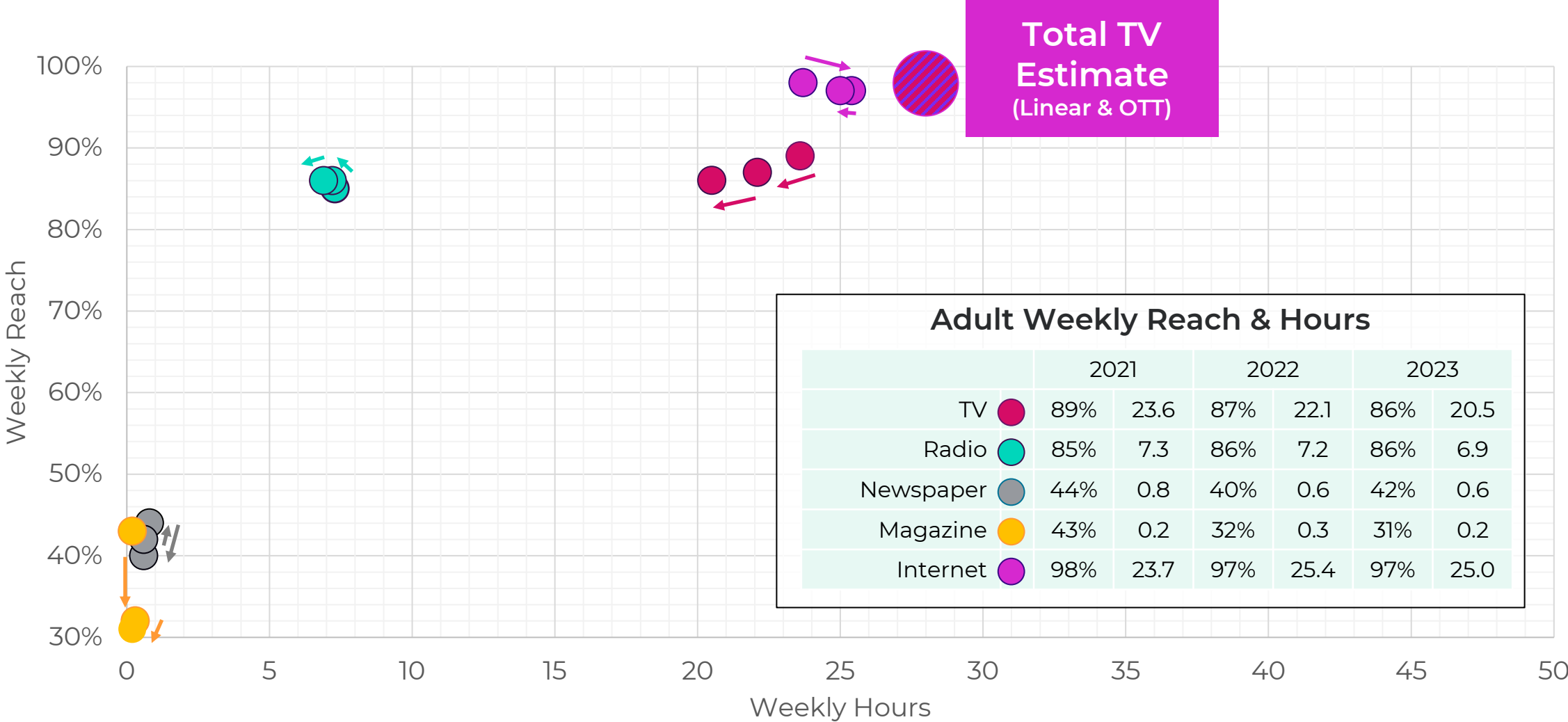
Distribution of selected numbers: "Choose an integer number between 1 and 100"



A 20-year trend

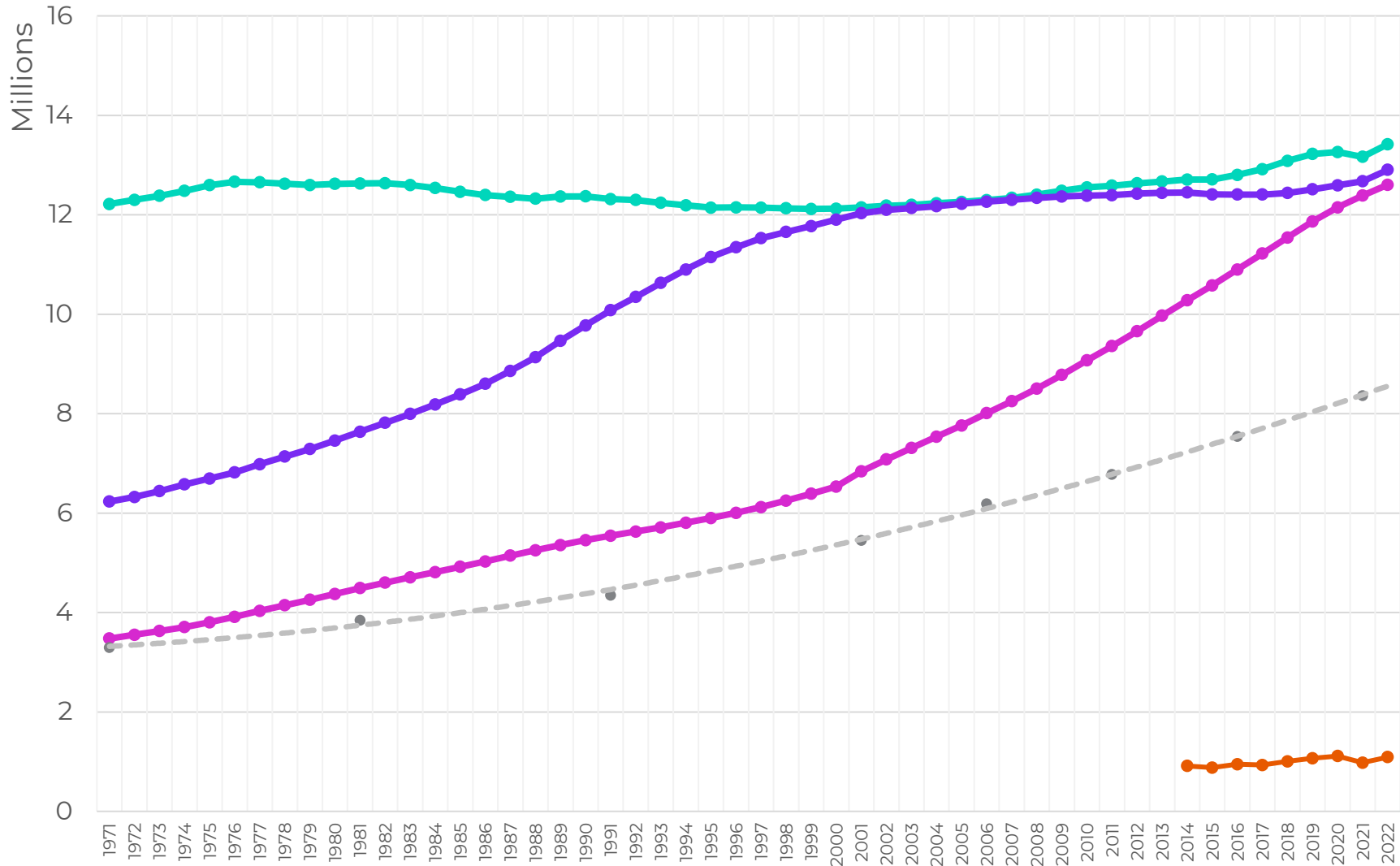


The last 3 years: TV & Print Declines



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

Population by Age



Under 30



30-54



55+



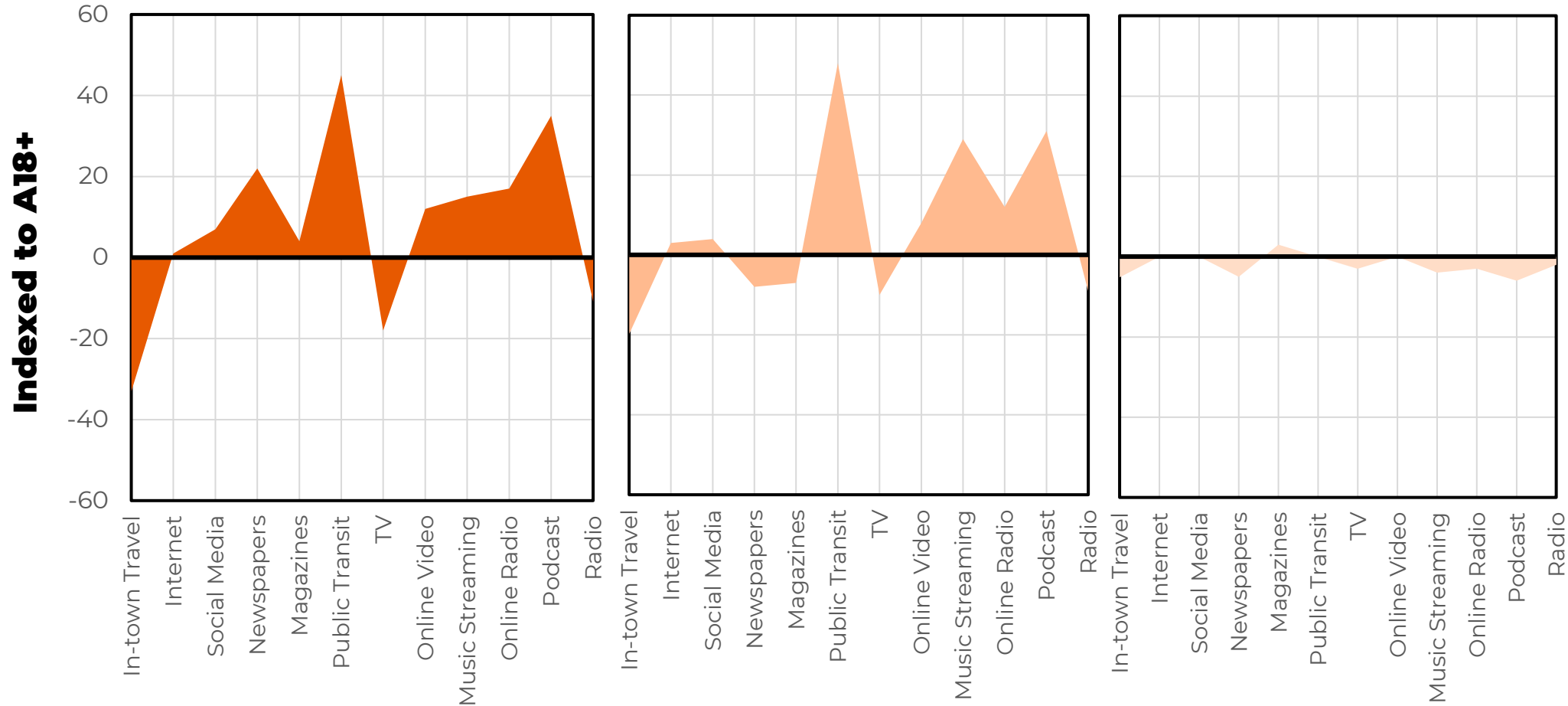
Newcomers (<5 years)

Newer Canadians (<5 years) have distinct media habits

Less than 5 years in Canada

5-10 years in Canada

More than 10 years in Canada





**Under
30**



30-54



55+



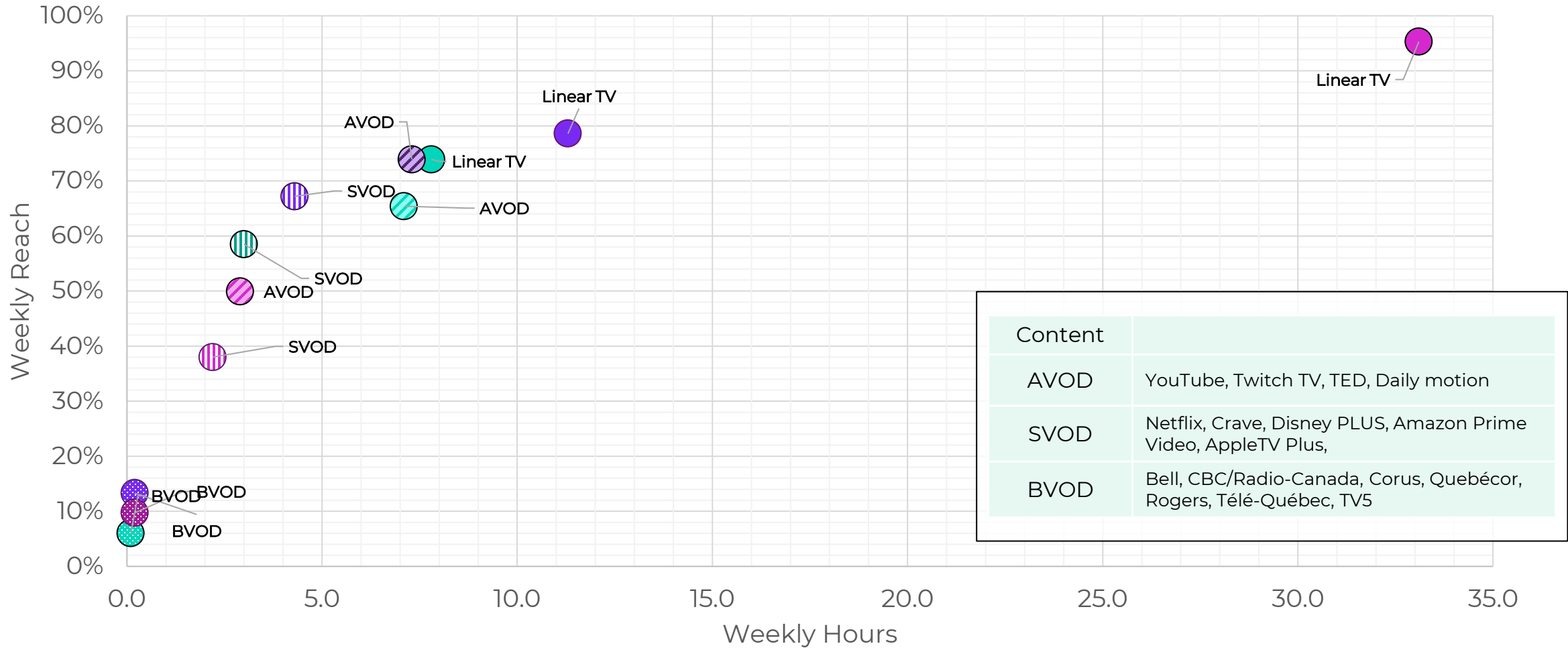
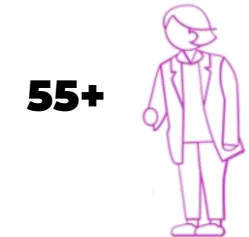
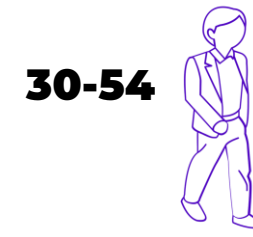
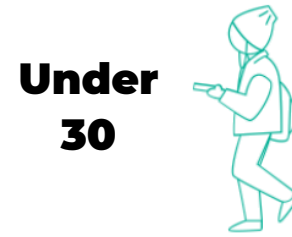
**Newcomers
(<5 years)**



A group of five stylized, colorful robots are gathered around a campfire in a dark, wooded setting. The robots are rendered in shades of purple, blue, and pink. They are sitting on rocks, and the fire is burning brightly in the center. The background is a dark, misty forest with bare trees. The overall mood is mysterious and contemplative.

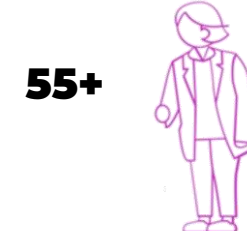
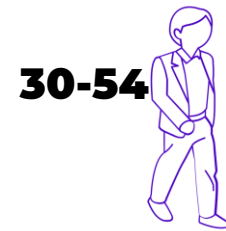
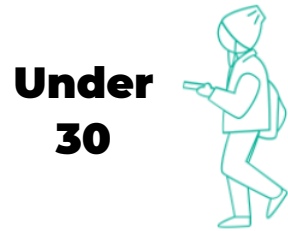
**We think in
narrative.**

Continued Adoption of Digital Video

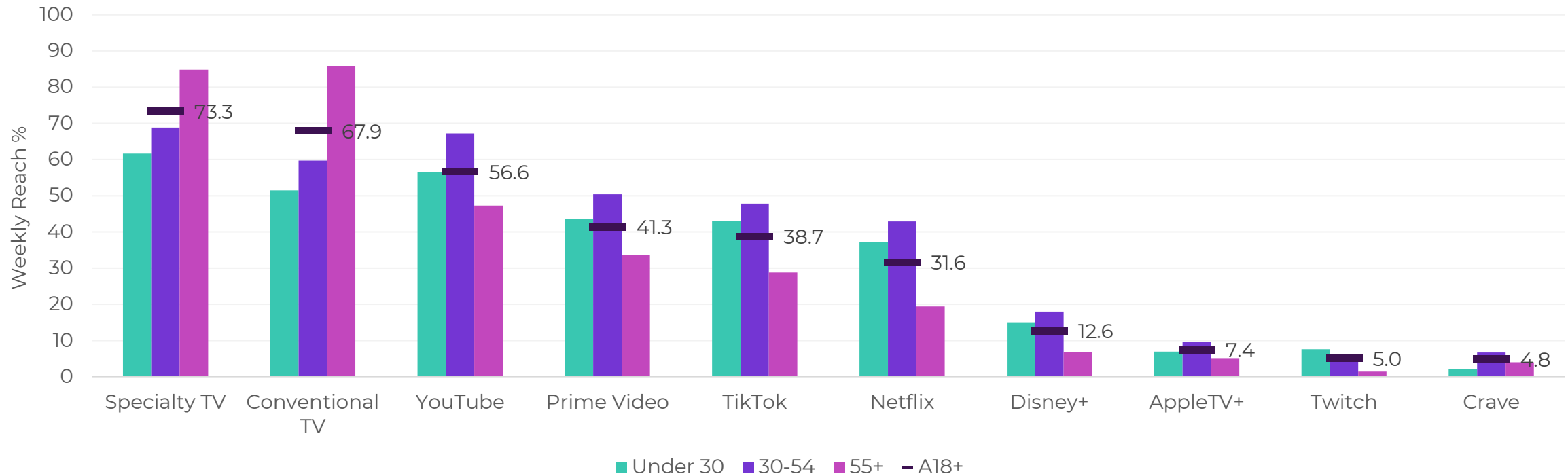


Content	
AVOD	YouTube, Twitch TV, TED, Daily motion
SVOD	Netflix, Crave, Disney PLUS, Amazon Prime Video, AppleTV Plus,
BVOD	Bell, CBC/Radio-Canada, Corus, Québecor, Rogers, Télé-Québec, TV5

Middle Cohort Adopting Fastest

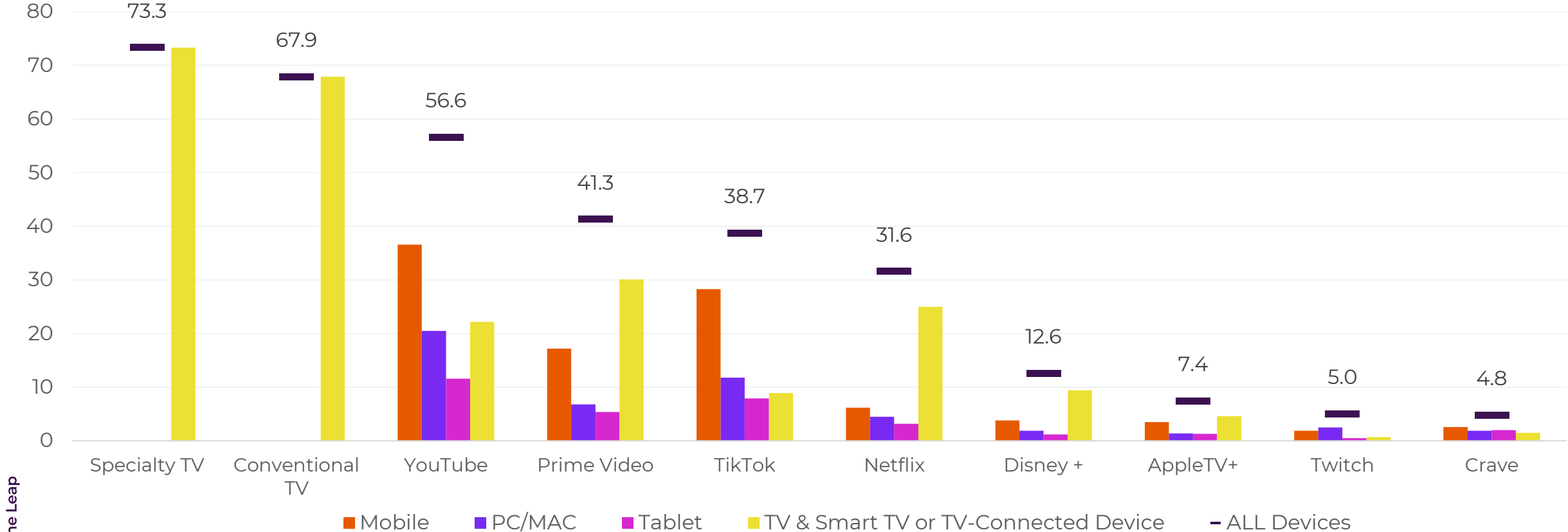


Weekly Reach by Age Group



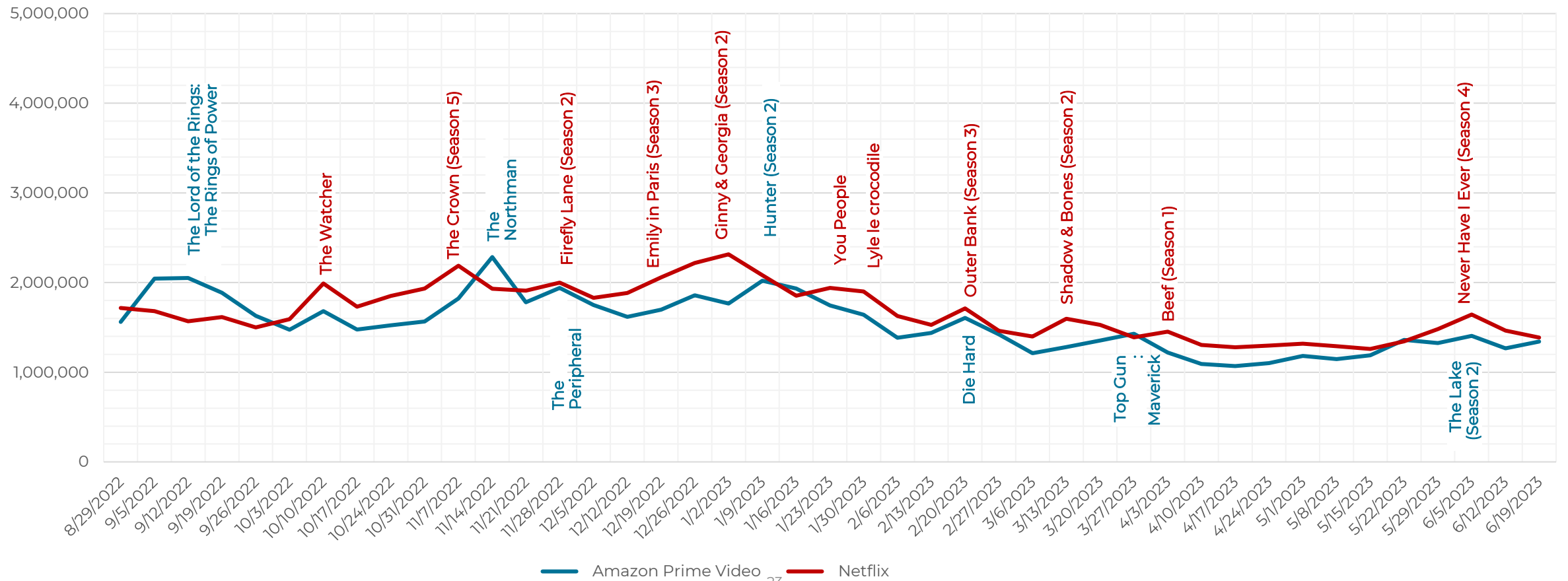
Platforms differ in their device distribution

Video Weekly Reach by Device A18+

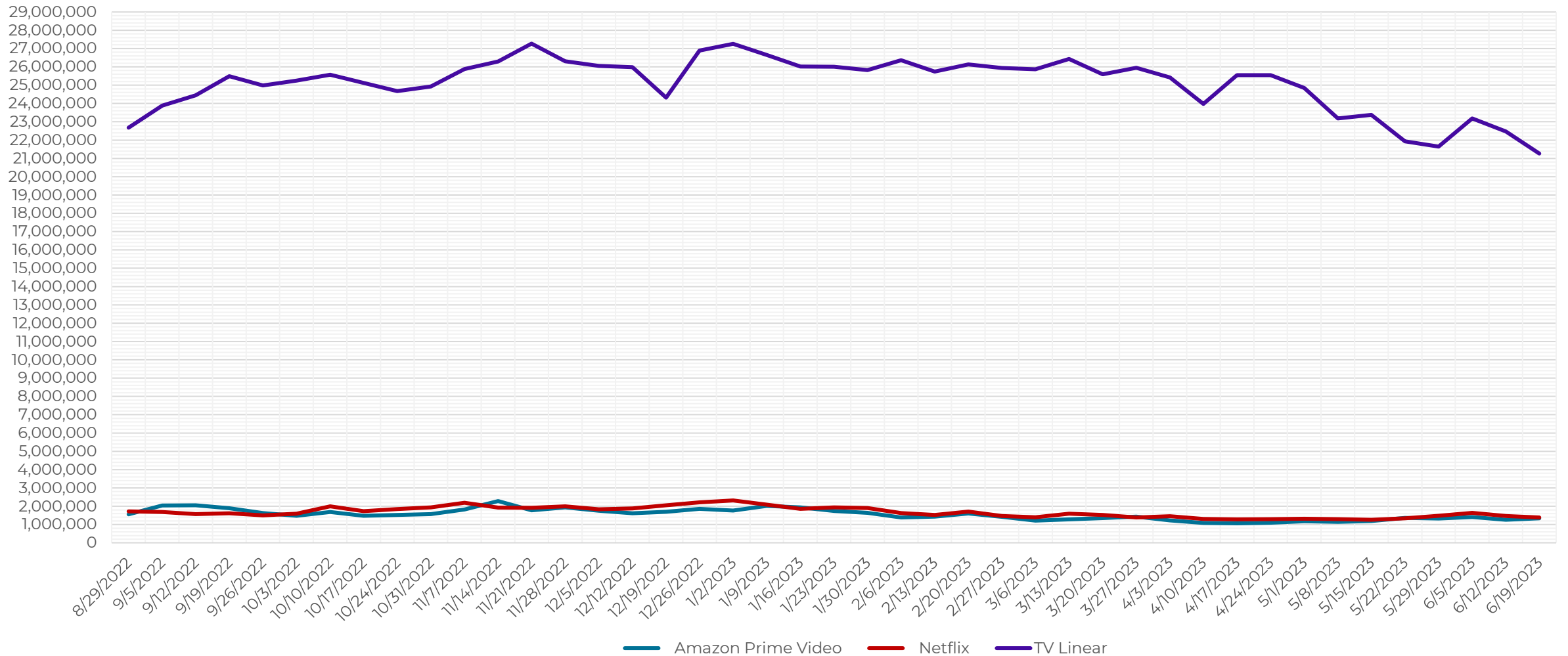


Source: Numeris VAM, Mar 27 to June 25, 2023

Content releases drive audience behaviour

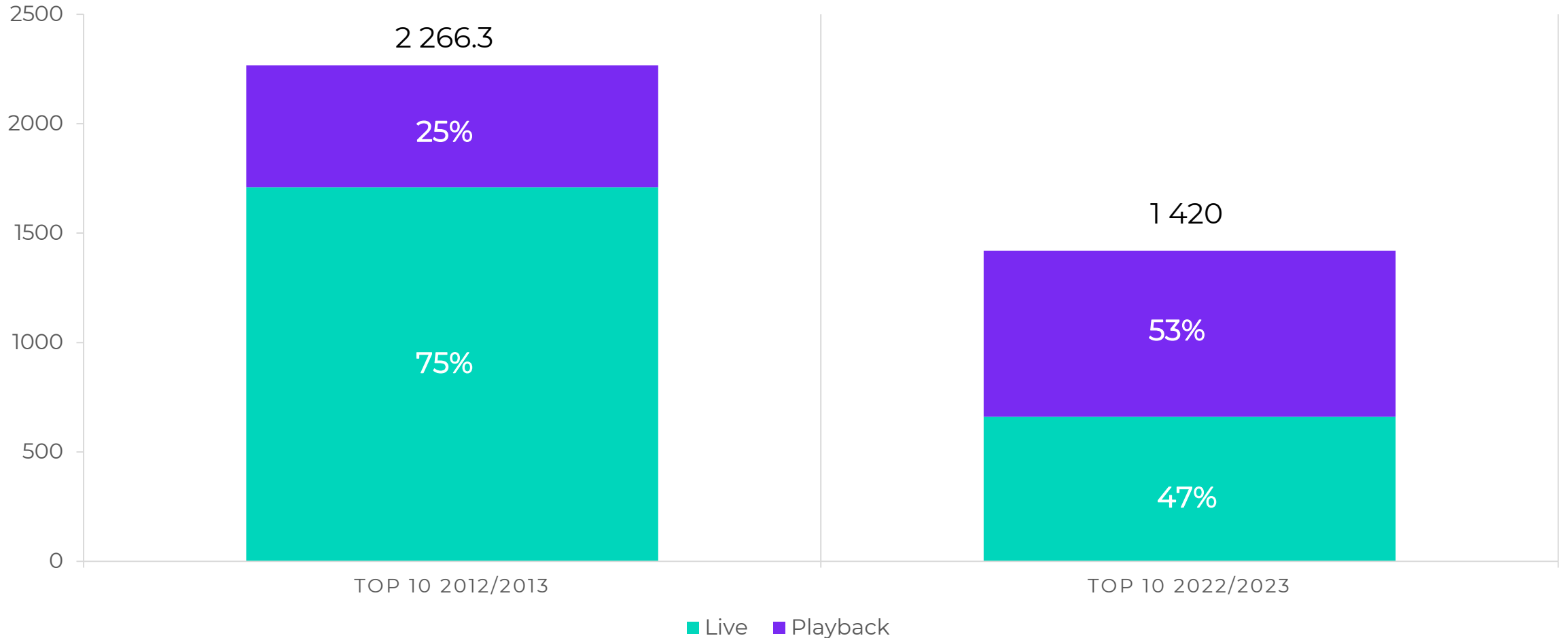


Linear TV maintains more scale and consistency

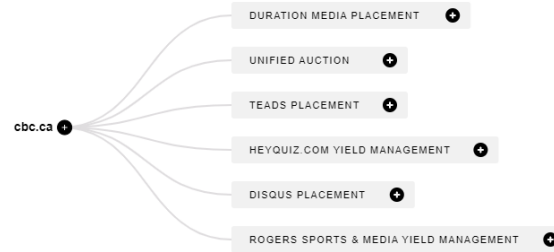
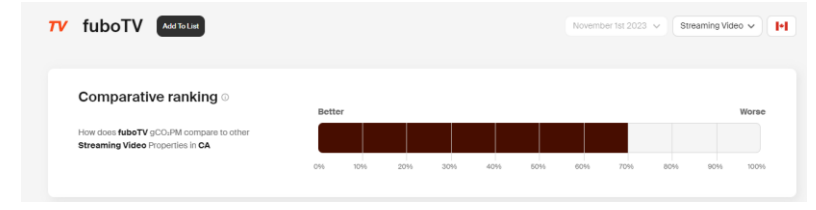
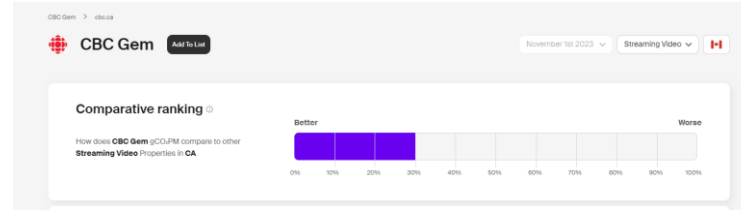
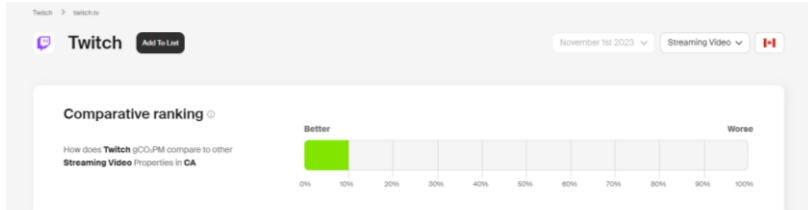


Dramatic drops in Top TV 'shows' in the last decade

AVERAGE TOP 10 AMA (000)



Carbon efficiency is a growing concern



A scene from a forest with two robots. One robot is in the foreground, facing the viewer, and another is in the background, facing away. Both robots are purple and blue with yellow eyes. The text "We think in nature" is overlaid in the center.

**We think in
nature**

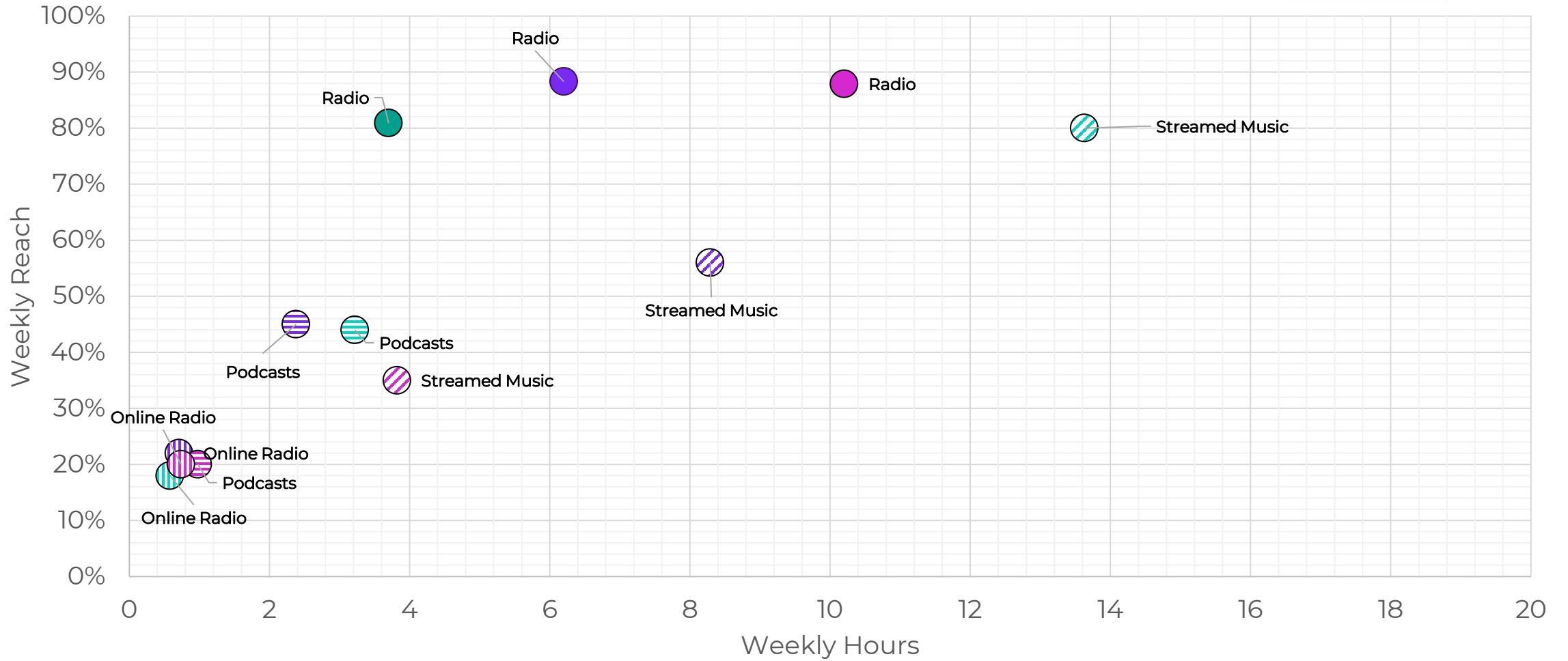
**Under
30**



30-54



55+

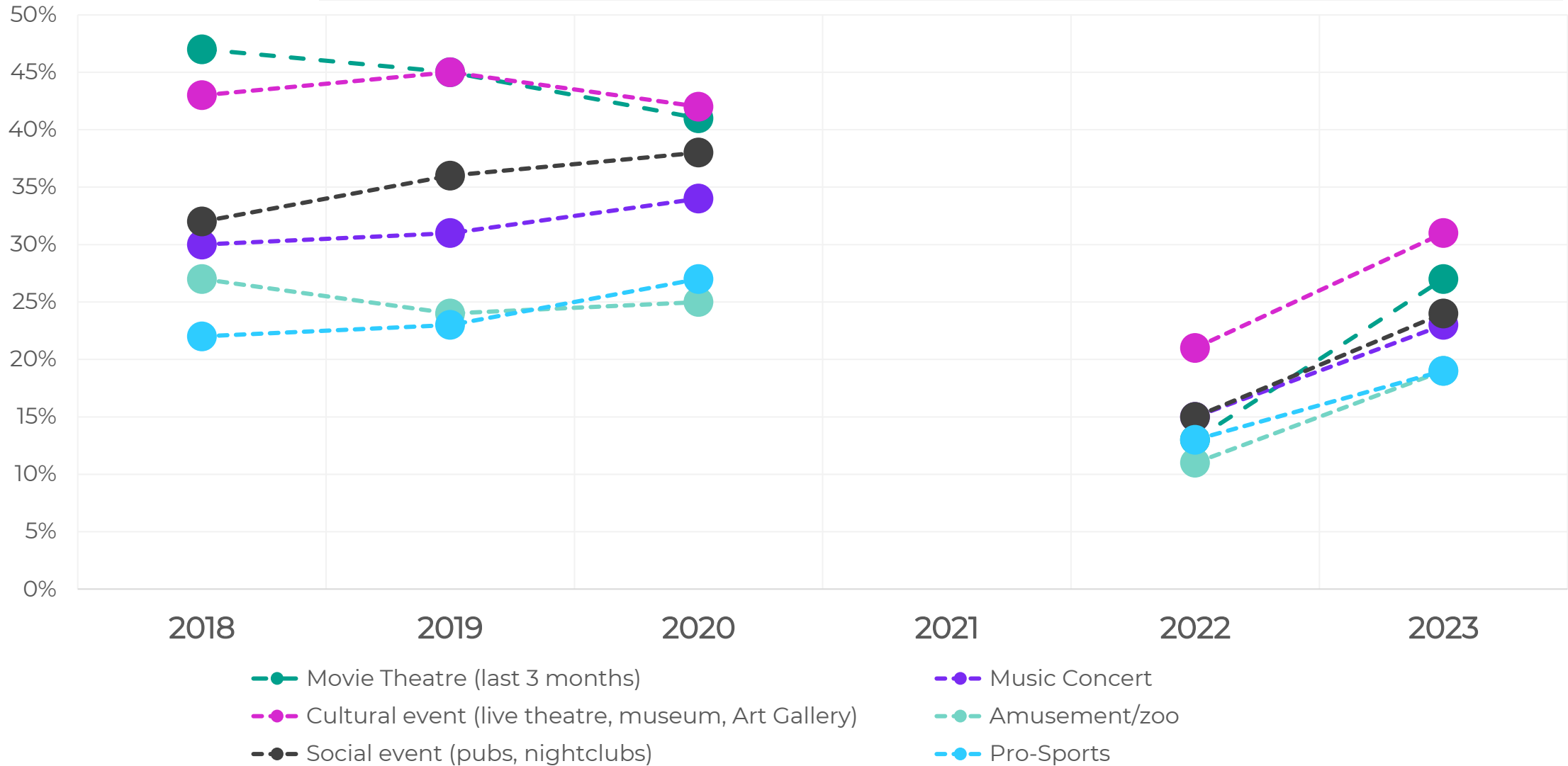


Source: Numeris PPM Radio, MTM Spring 2023, PHD estimates from multiple industry sources,



**We think
through
imitation**

Adults 16+



**Under
30**



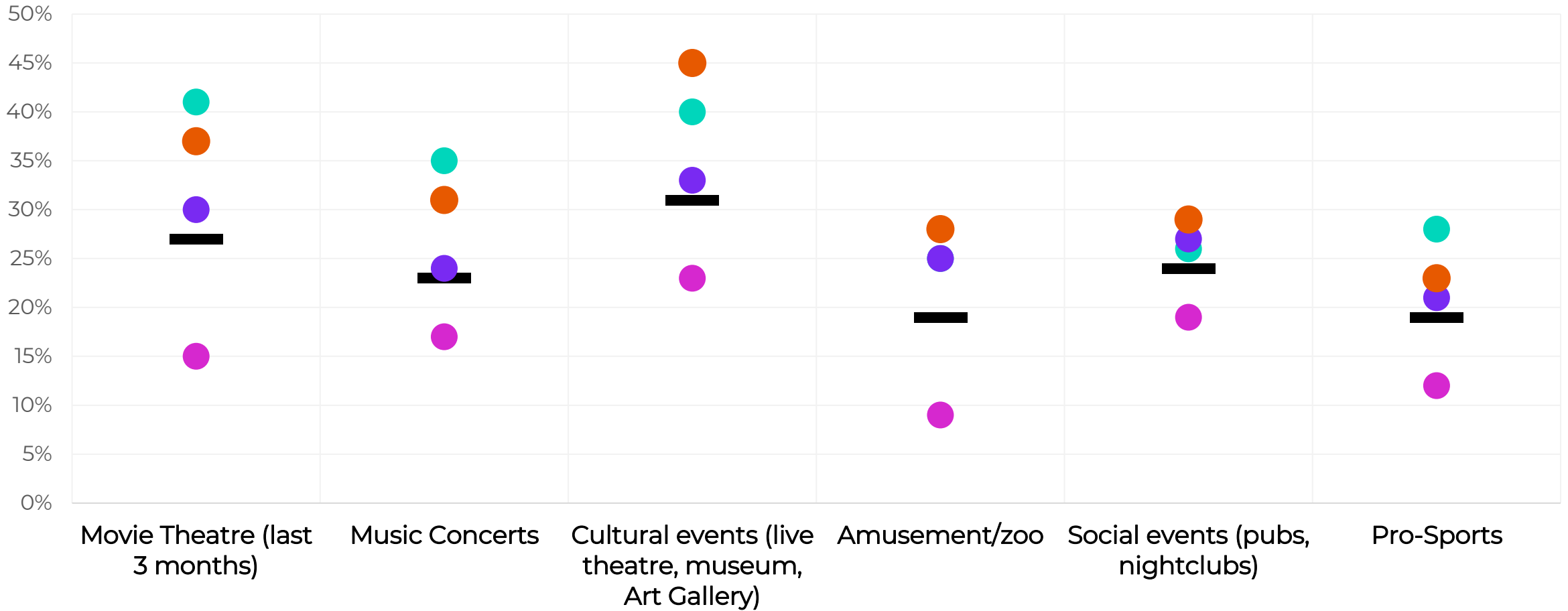
30-54



55+



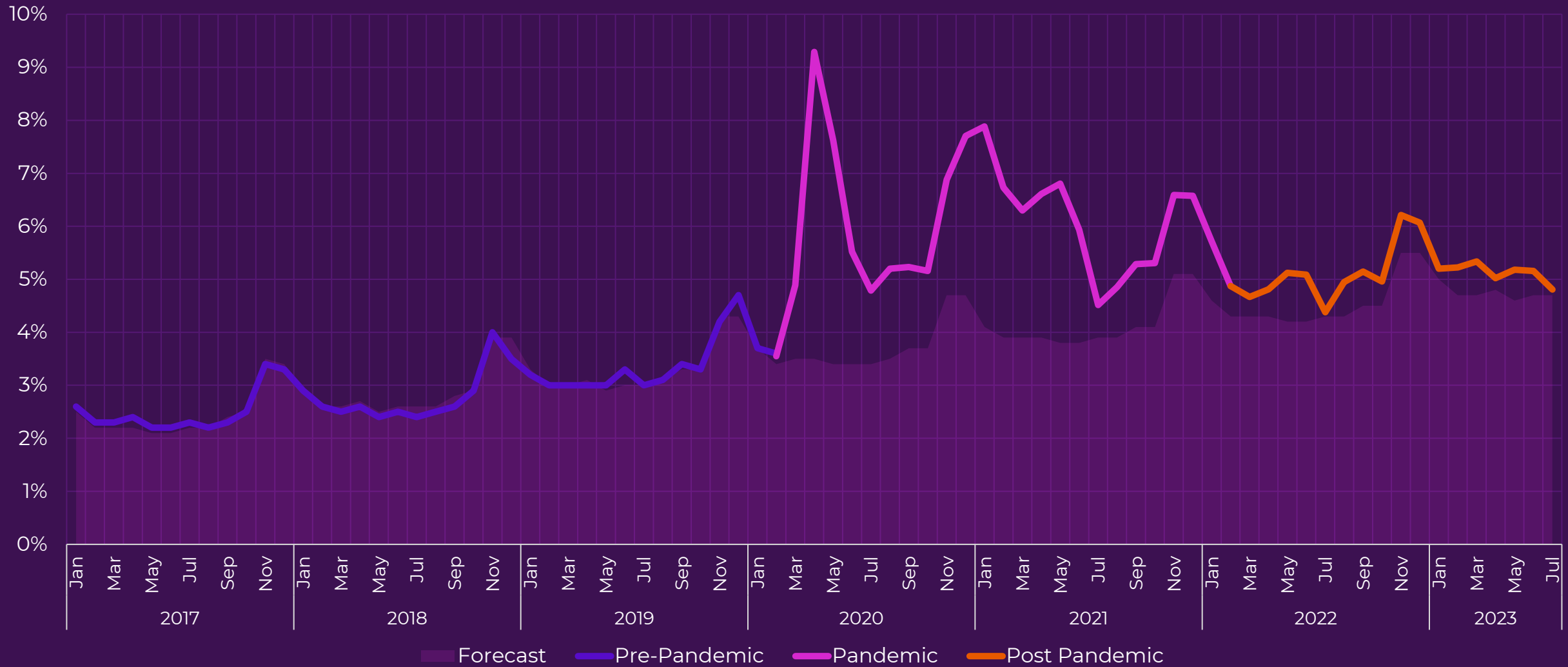
**Newcomers
(<5 years)**



A futuristic blue robot with a square head and a screen for a face is pushing a shopping cart through a grocery store aisle. The robot is holding the handle of the cart, which is filled with various items. The background shows shelves stocked with products and overhead signs, including one that says "BOOCLIX'ACS". The scene is lit with soft, ambient light, creating a modern and clean atmosphere.

**We think in
physical
spaces**

Share of Retail Sales Occurring Online



Time Spent – Shopping Categories



**Under
30**



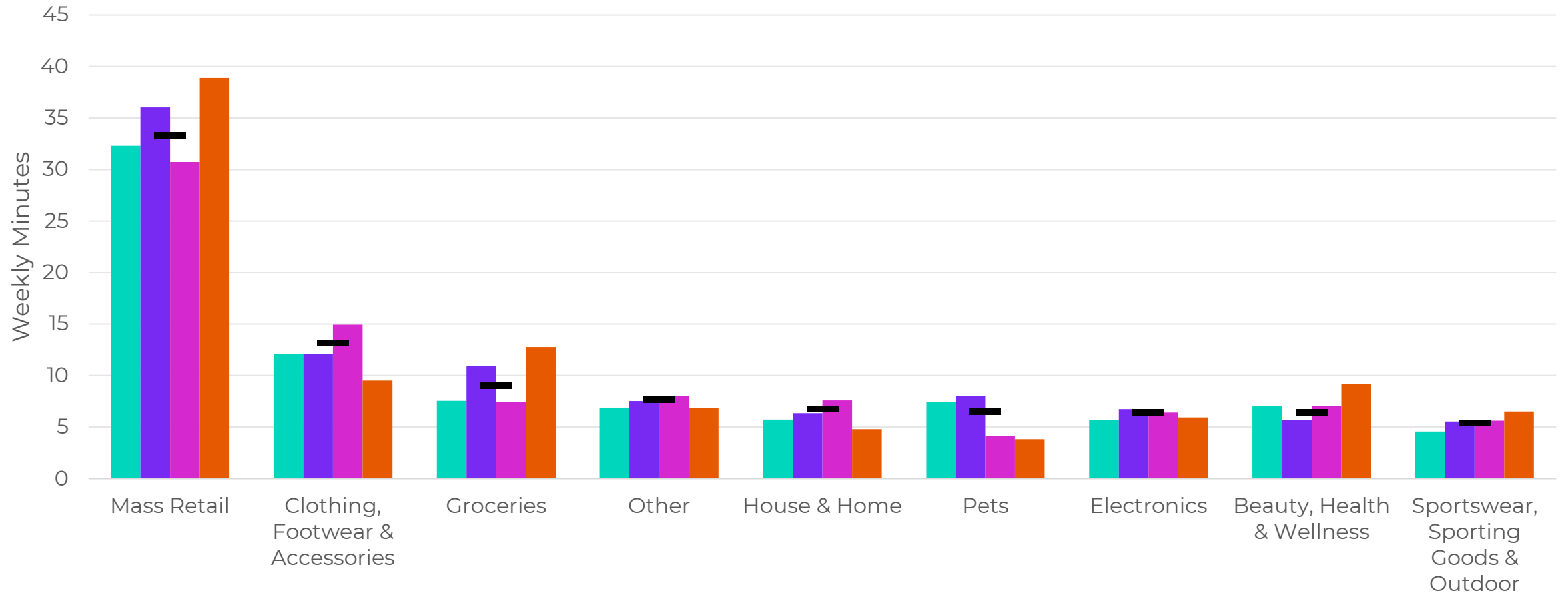
30-54



55+



**Newcomers
(<5 years)**



Each of the cohorts spend similar amounts monthly



\$159

Online spent
past month



\$185

Online spent
past month



\$154

Online spent
past month

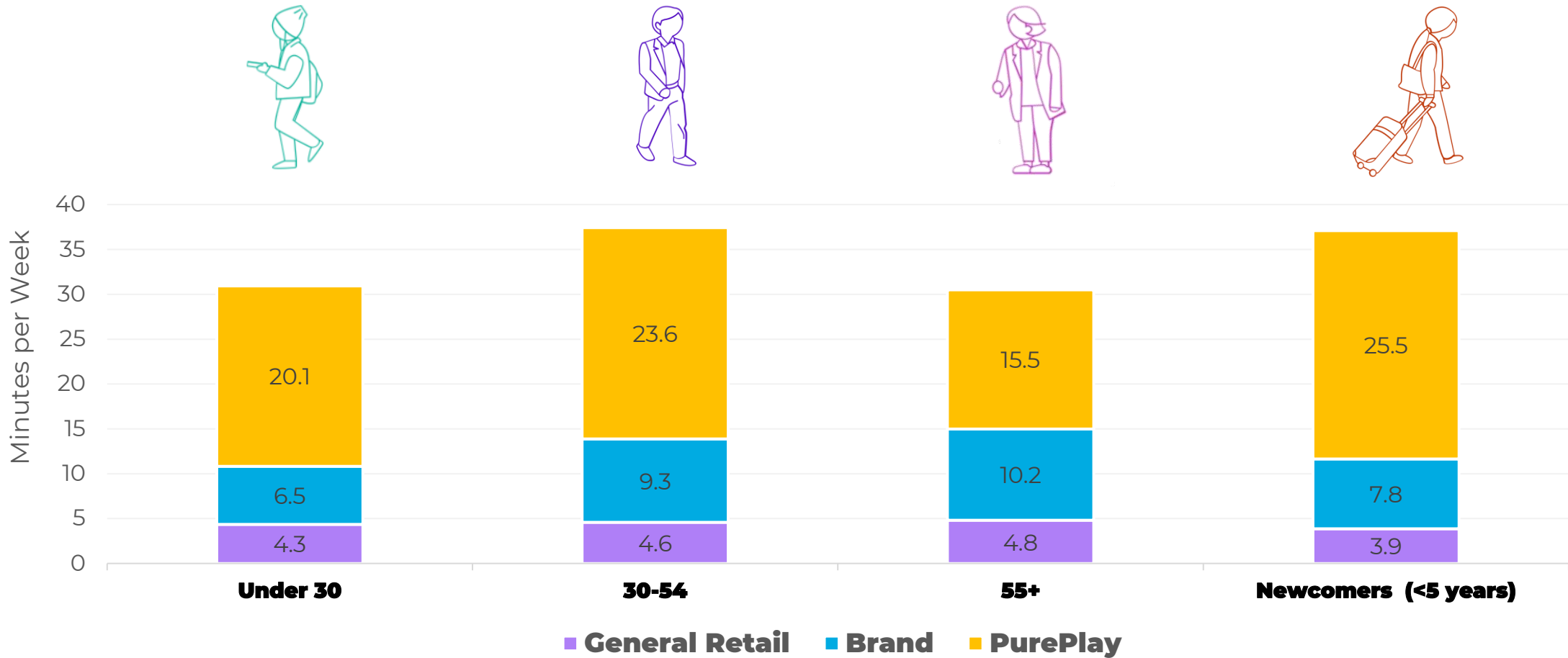


\$173

Online spent
past month

Pureplay Retailers Dominate Time – especially amongst younger groups

Time Spent on Shopping Sites/Apps



Two humanoid robots are seated at a table, facing each other. The robot on the left is dressed in a light pink, fringed, long-sleeved garment and a silver, dome-shaped helmet with a circular sensor. The robot on the right wears a teal, fringed, long-sleeved garment and a teal helmet with a circular sensor. They appear to be in conversation. The background is a dark, vertically-pleated curtain.

**We think
through
dialogue**

There's been a lot of dialogue about Bill C-18

June 22nd

Adoption of Bill C-18 in Canada.

Meta announced its intention to block access to Canadian news on its platforms.



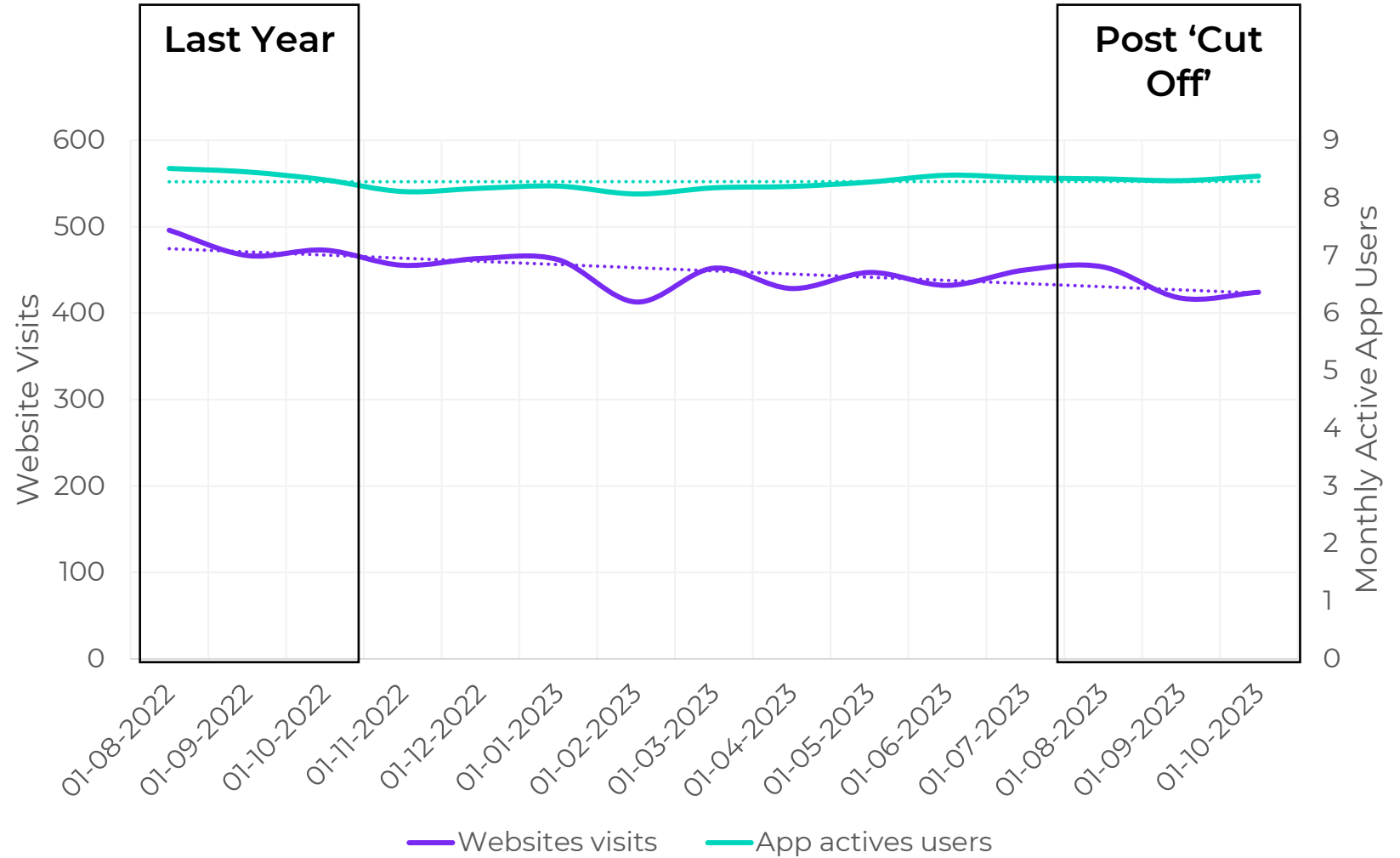
August 1st

Meta starts blocking access to Canadian news



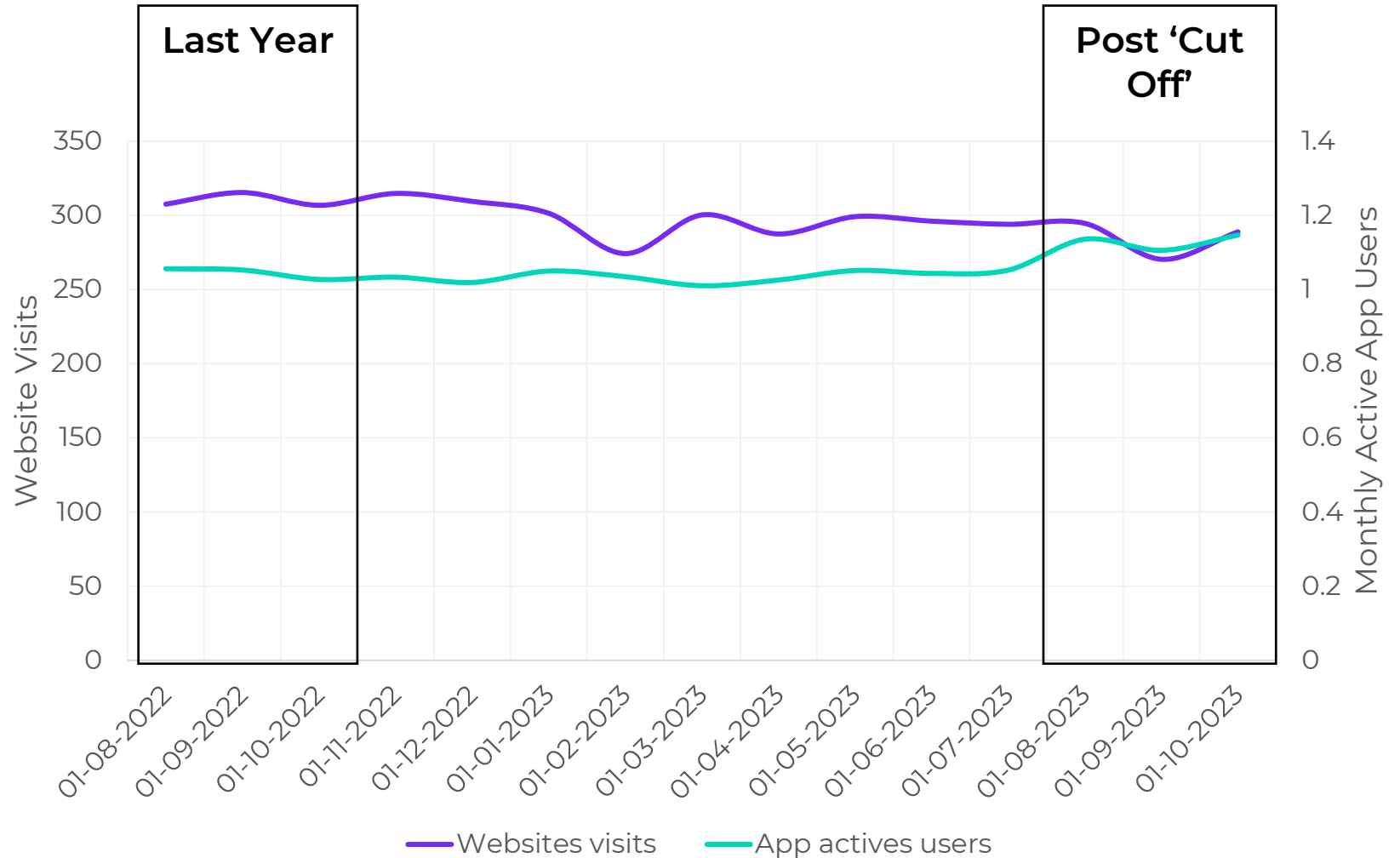
Facebook Traffic was not significantly impacted

	Vs. Previous 3 Months	Vs. Same Period Last Year
Web	-1.1%	-9.8%
Mobile	0%	-2.6%



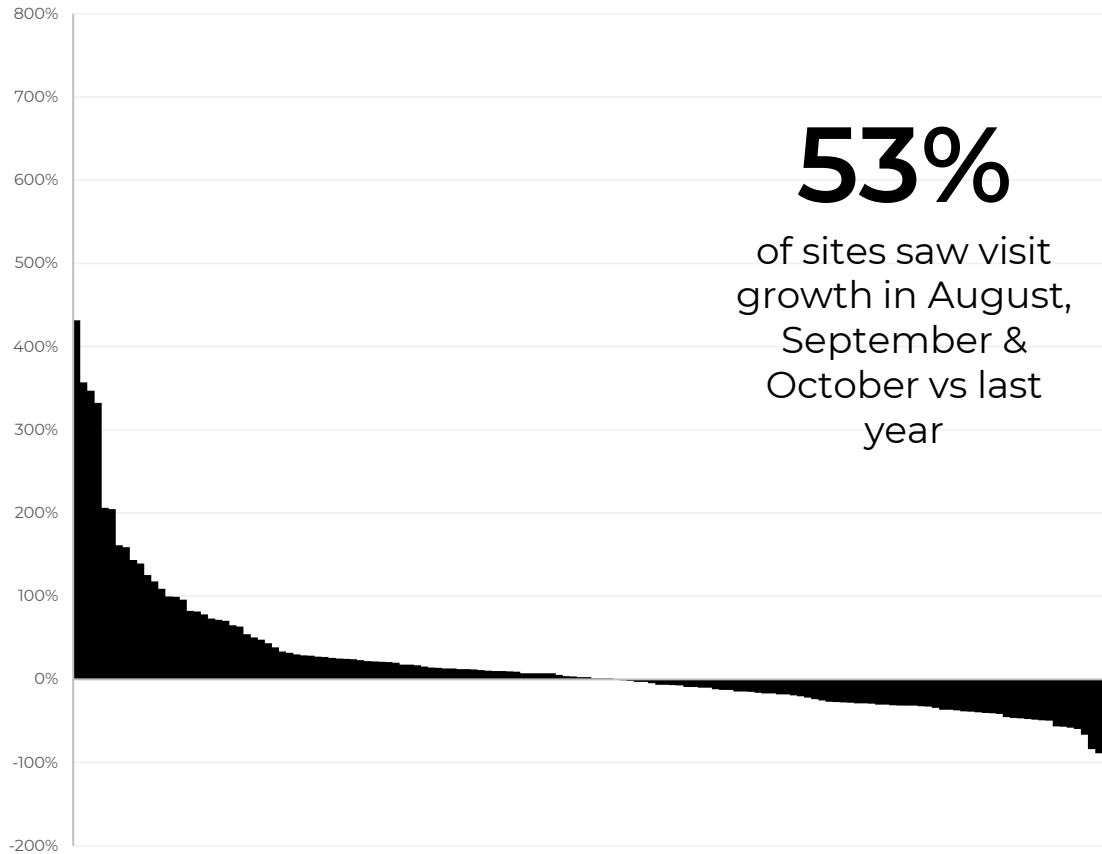
News traffic declined – but not dramatically

	Vs. Previous 3 Months	Vs. Same Period Last Year
Web	-4.0%	-8.1%
Mobile	7.7%	8.0%

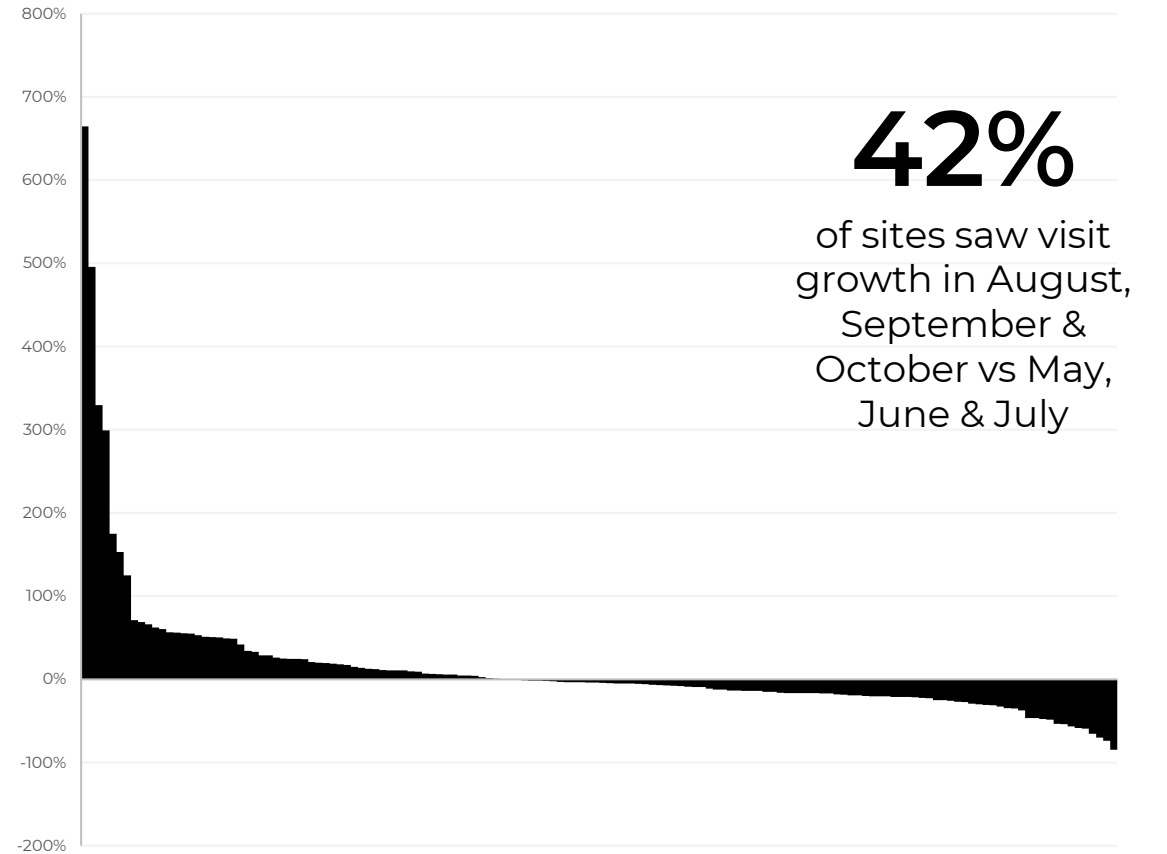


It's looking like there will be 'winners and losers'

Change vs Last Year



Change vs Last Period



2 big questions Marketers ask:

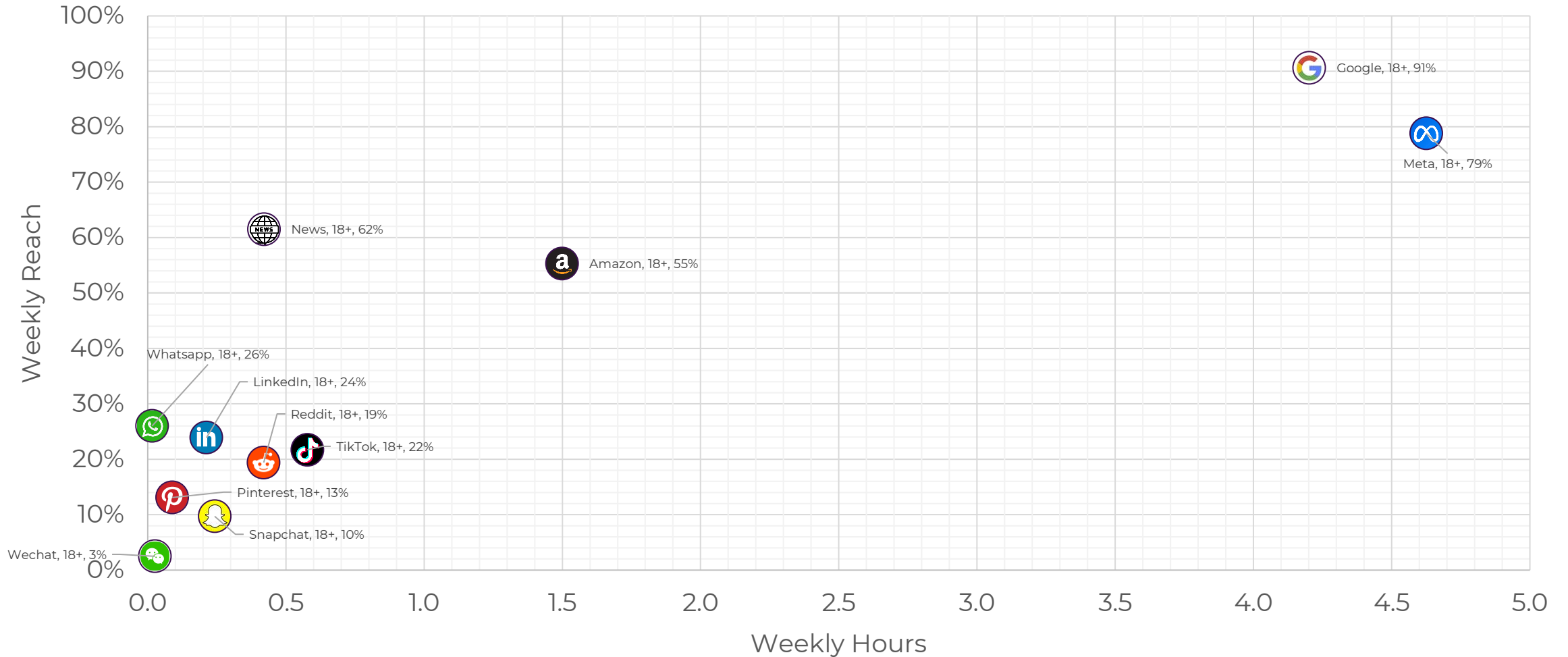
Can I reach
consumers
with
Canadian
media?

Media
habits vs.
Media
spend

Is it more
expensive
to invest in
Canadian
media?

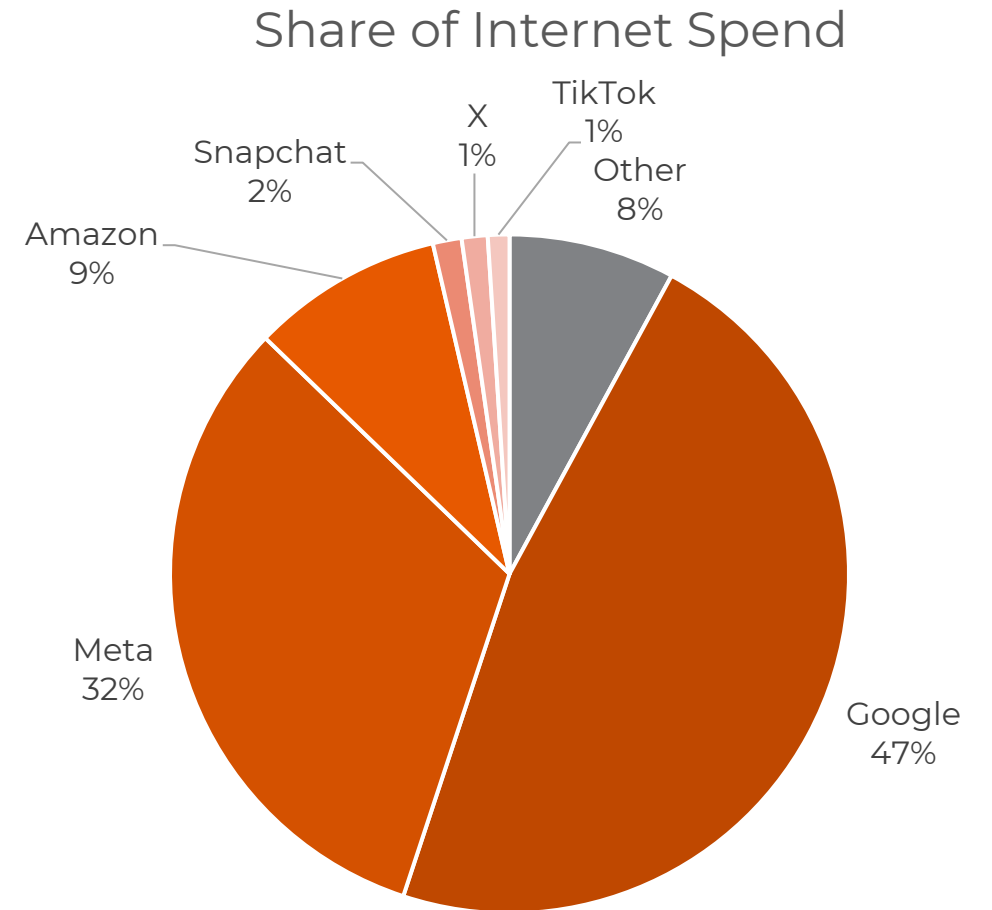
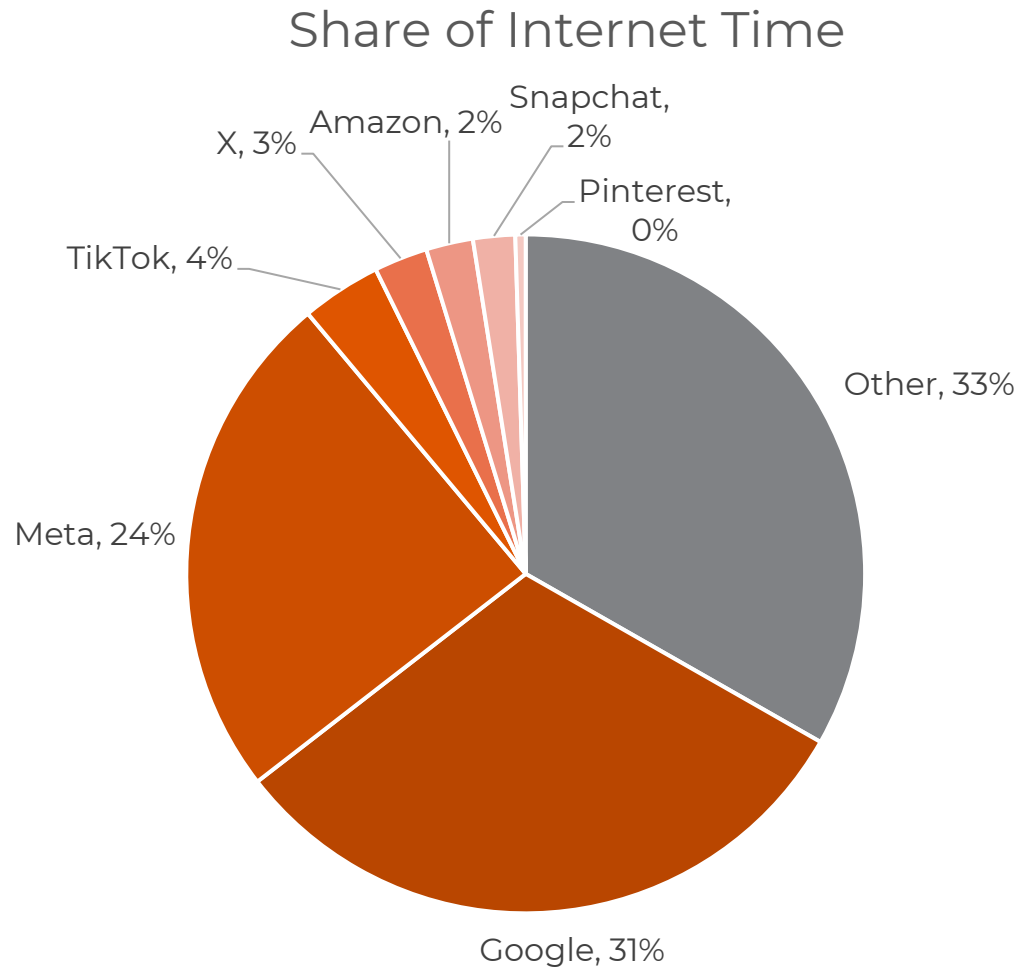
Measurement
framework
that
measures
attention and
outcomes

News would be the 3rd biggest 'walled garden'



Source: Vividata Metrica Summer 2023, A18+

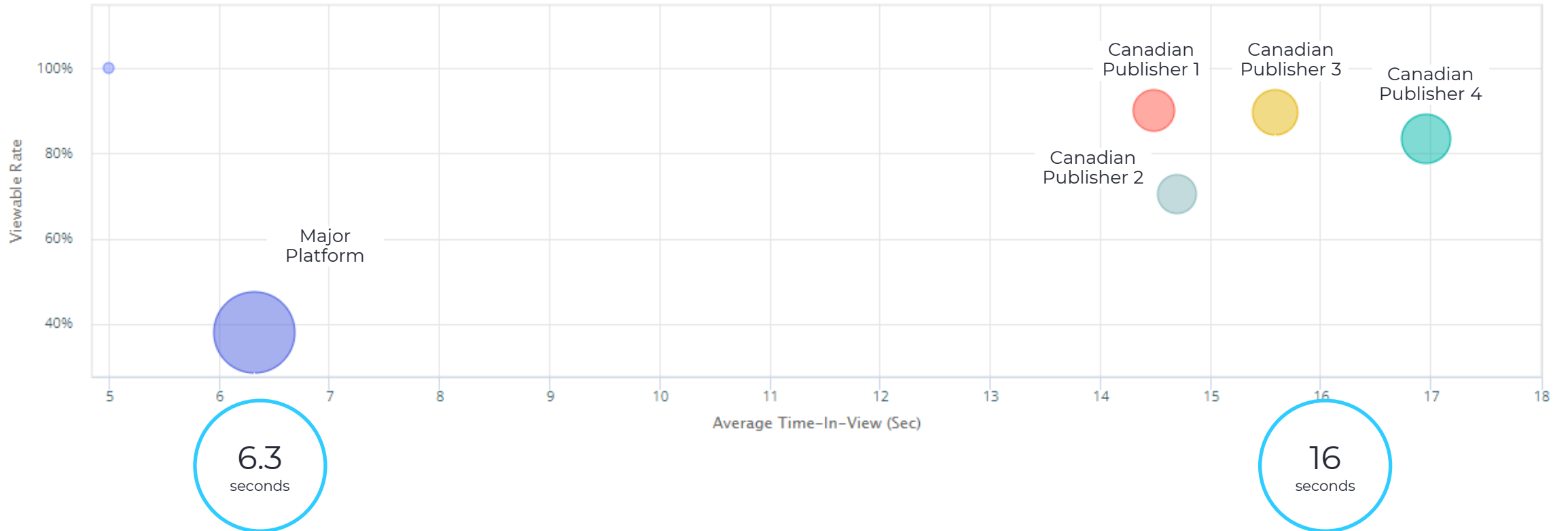
Platforms get a disproportionate share of internet spend



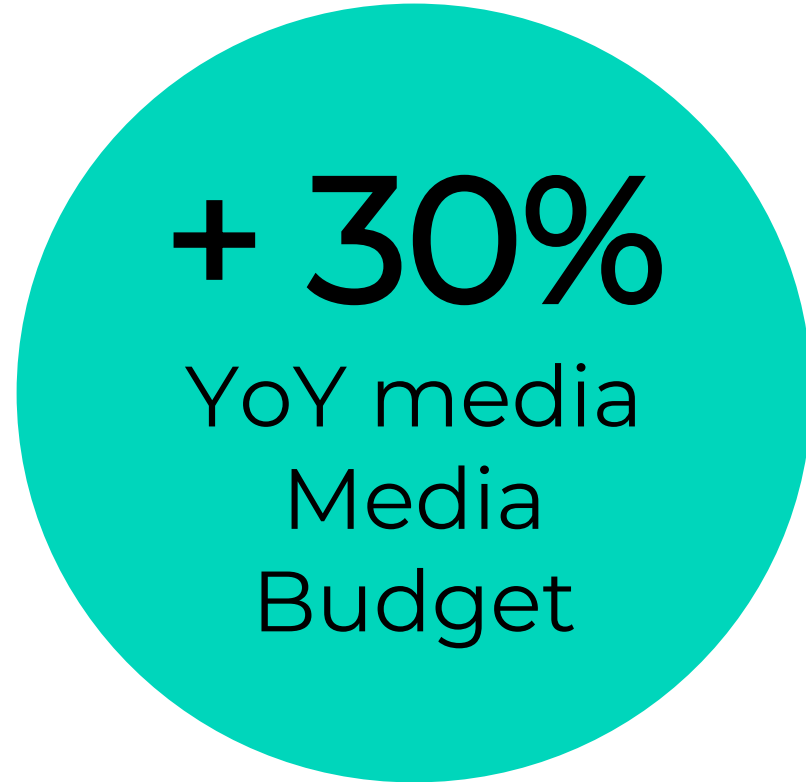
Source: Vividata Metrica Summer 2023, A18+, Canadian Media Concentration Research Project

Measuring quality of impressions is increasingly important

Viewability/Audibility by Media Partner



Lots of 'anecdotal' evidence about the lift of a news-forward strategy



Source : Touché! Campaign (July to September 2023 vs previous year same period)

Industry recommendation

CANADIAN MEDIA MANIFESTO

25%

of total digital dollars

Inline with media habits of Canadian consumers.

May improve media efficacy.

Will have a stronger financial impact than Bill C-18.

