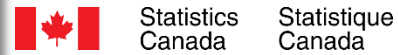




# CMUST

(Canadian Media Usage Study)

# 2023



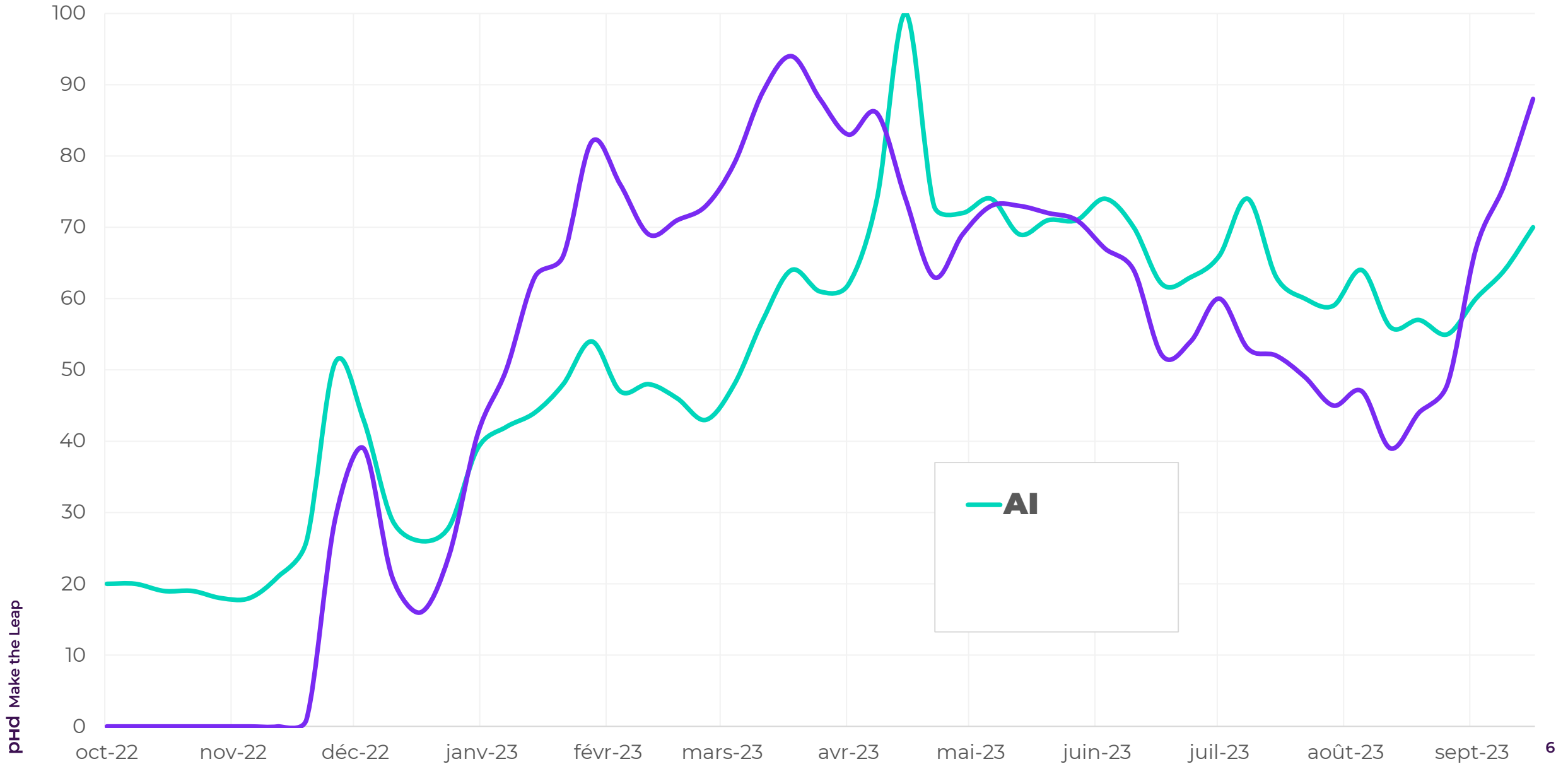
2023

was the year

**AI became famous**



# AI-Related Searches





**ON STRIKE**

**NEW OVERNIGHT**

**HOLLYWOOD WRITERS GO ON STRIKE, PRODUCTION ON MANY TV SHOWS HALTED**

**CNN**

**CNN THIS MORNING**





**Scheduled  
Intuition**

**Finite  
Content**

**Collective  
Experience**

**Art**



**Responsive  
Algorithm**

**Infinite  
Content**

**Individual  
Experience**

**Math**

A woman with long dark hair is smiling and looking at a smartphone held in her hands. She is holding a baby in her arms. The background shows a kitchen with white cabinets and a countertop. The entire image has a dark purple overlay.

**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**

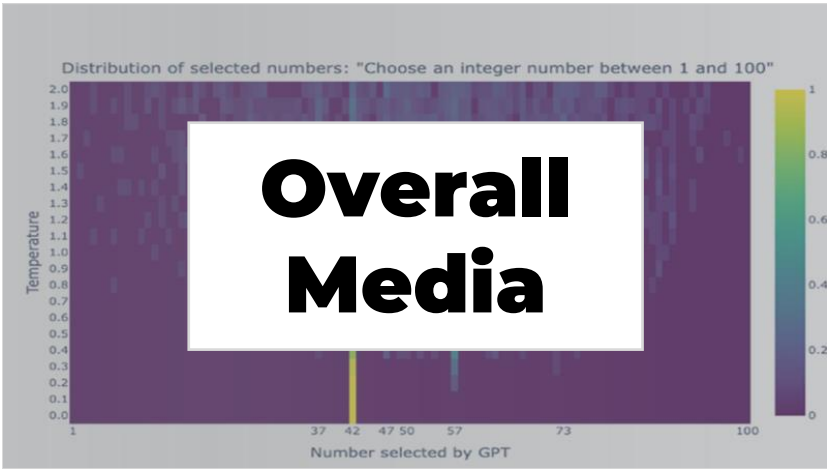
It's the stuff *outside*  
your head that  
makes you smart.

***The Extended Mind***

by Annie Murphy Paul

**ON SALE NOW!**

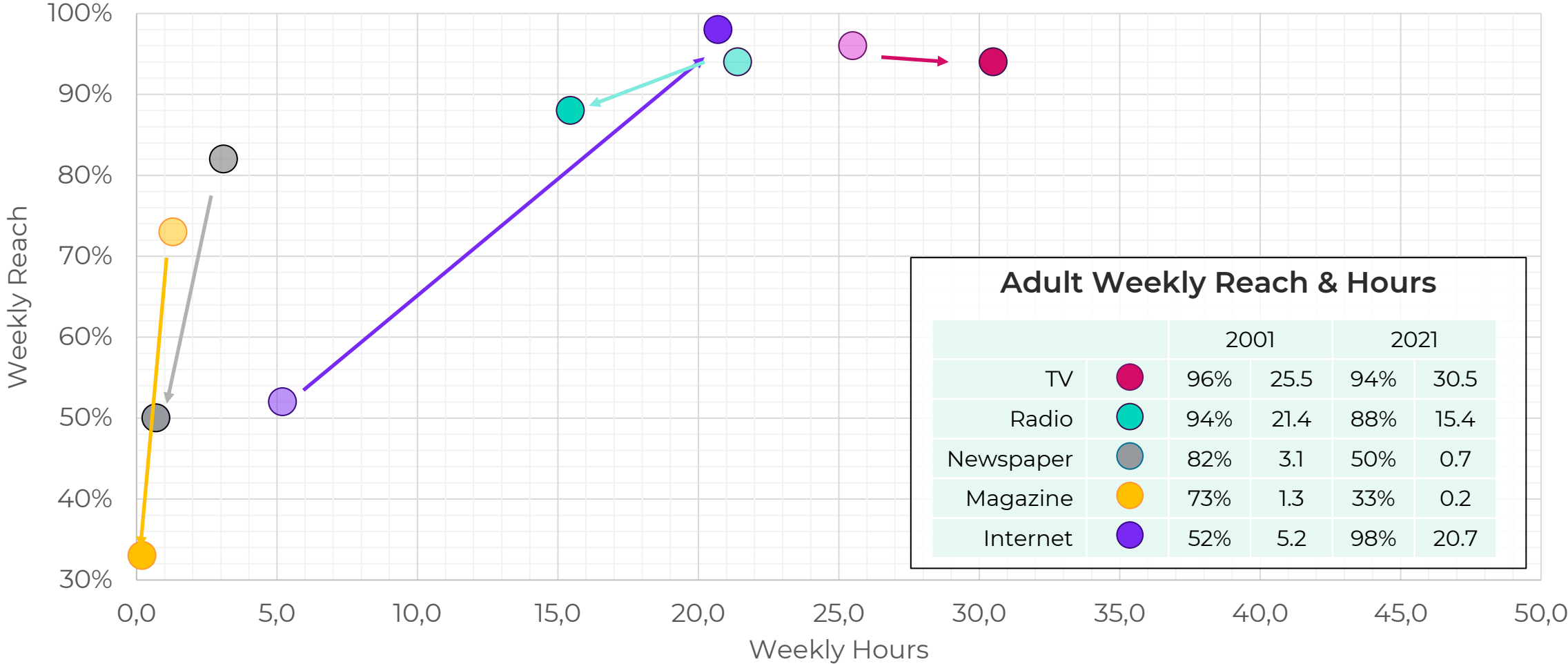
[www.AnnieMurphyPaul.com](http://www.AnnieMurphyPaul.com)



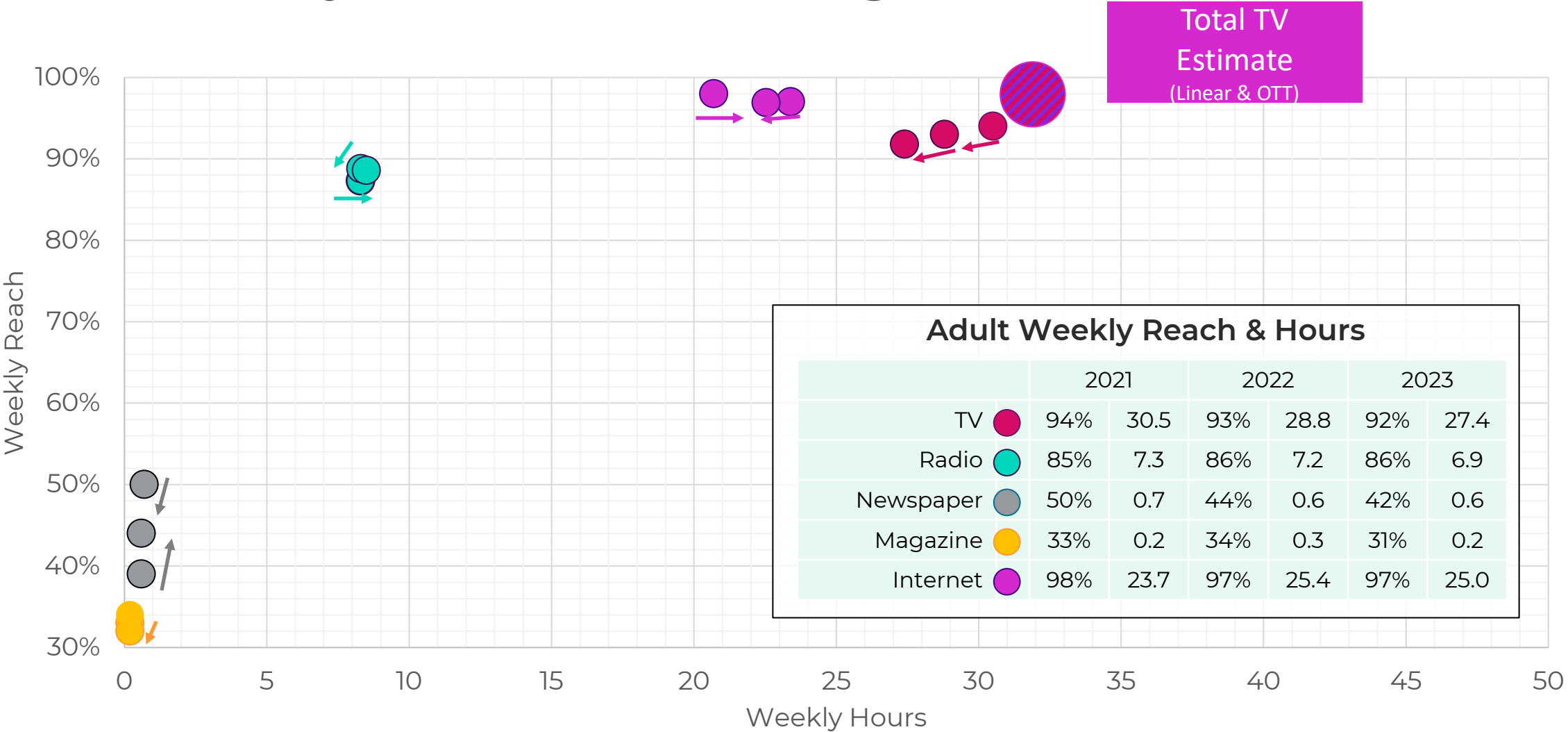
Distribution of selected numbers: "Choose an integer number between 1 and 100"



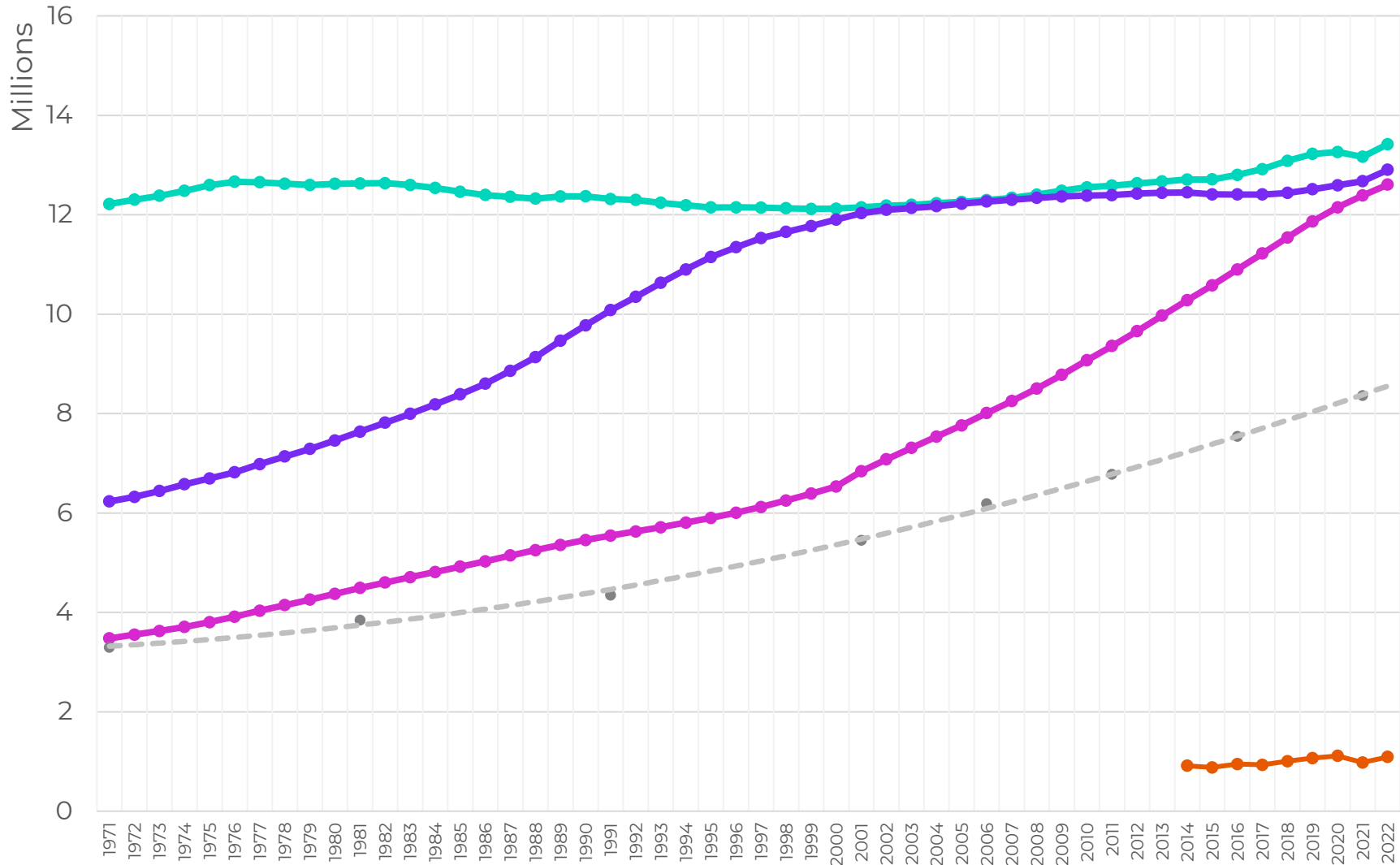
# A 20-year trend



# The last 3 years: accelerating trends



# Population by Age



**Under 30**



**30-54**



**55+**



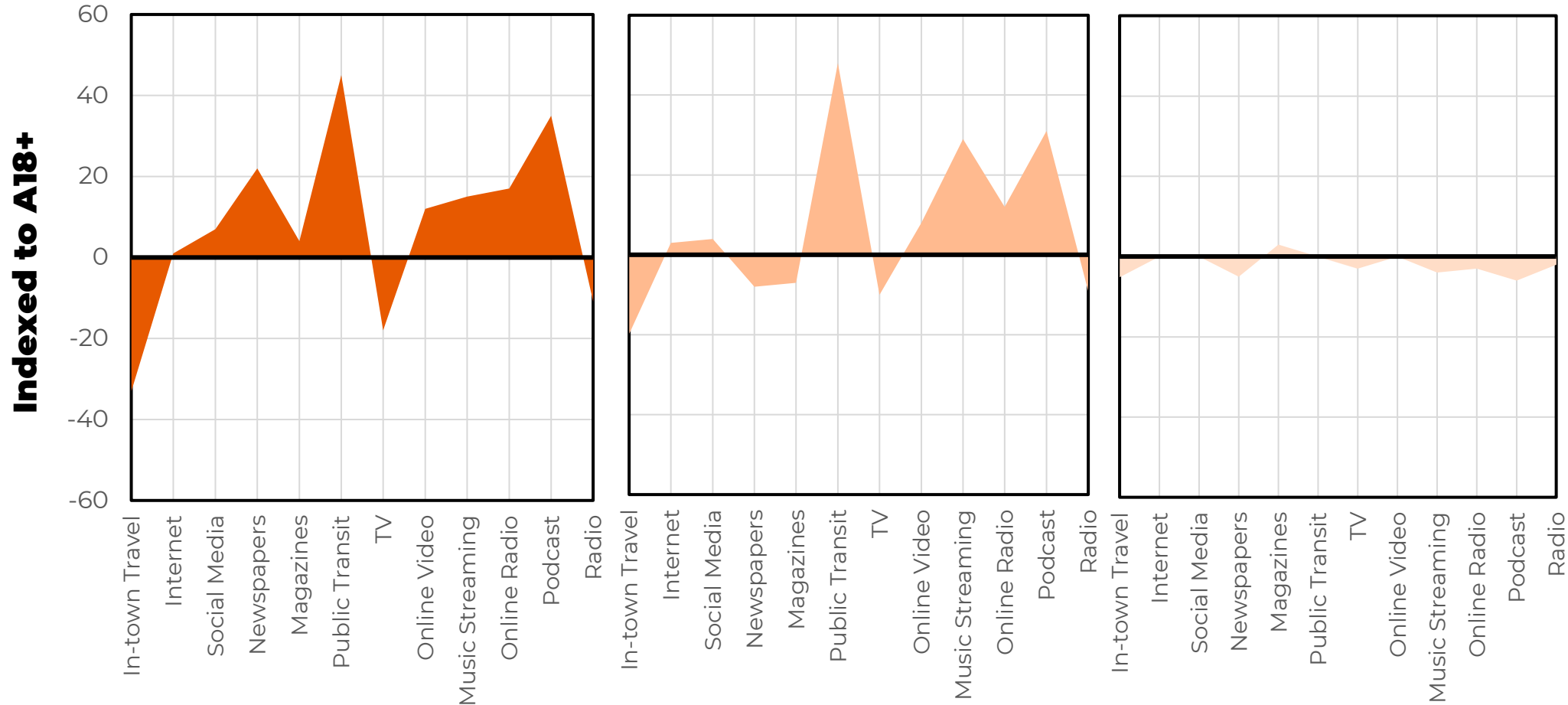
**Newcomers (<5 years)**

# 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)**





2023 is the year of AI, but AI is already in (almost) every house in Canada

TV is growing and fragmenting

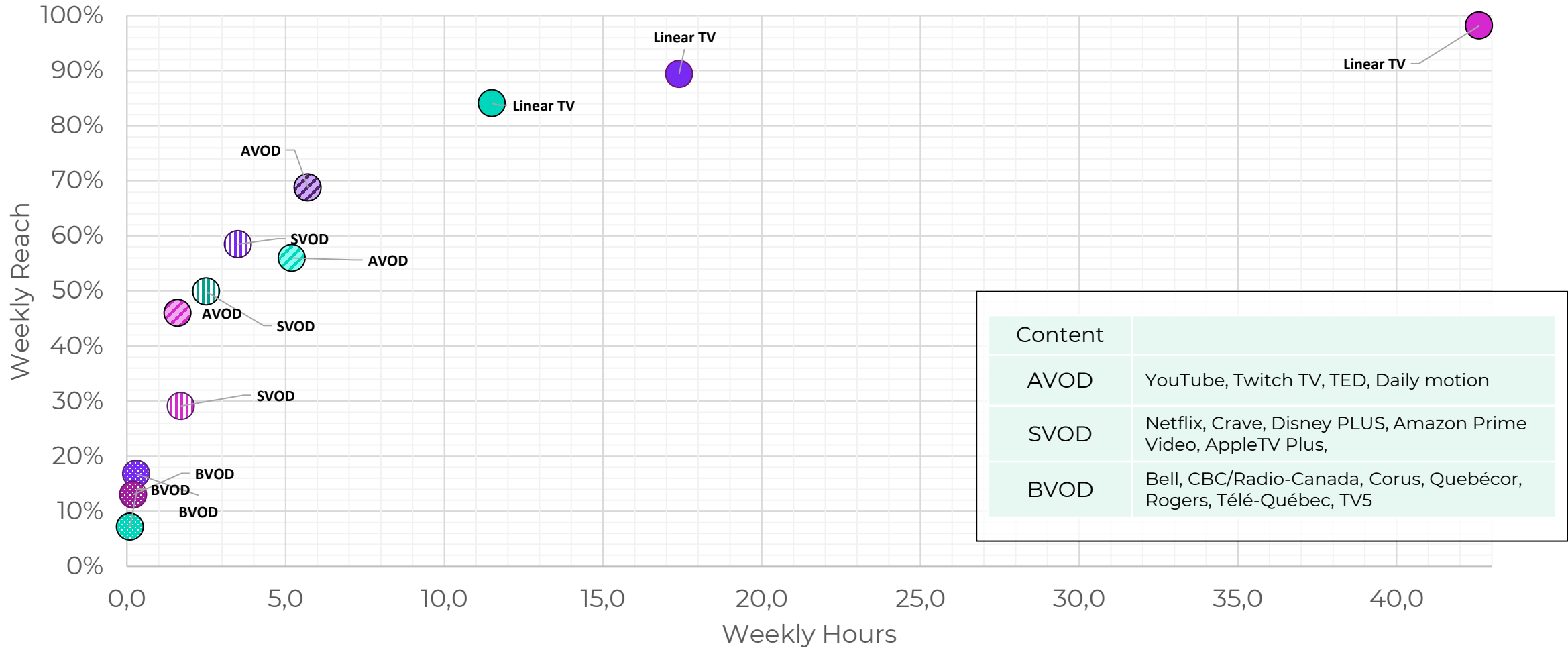
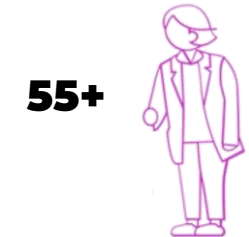
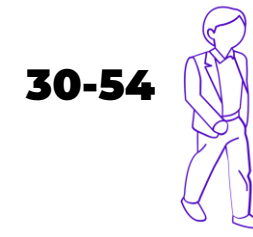
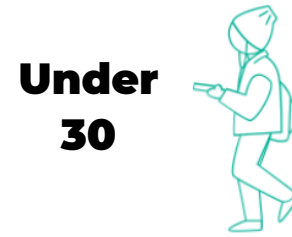
Print's decline is continuing

Newcomers' habits are closer to the youngest generation



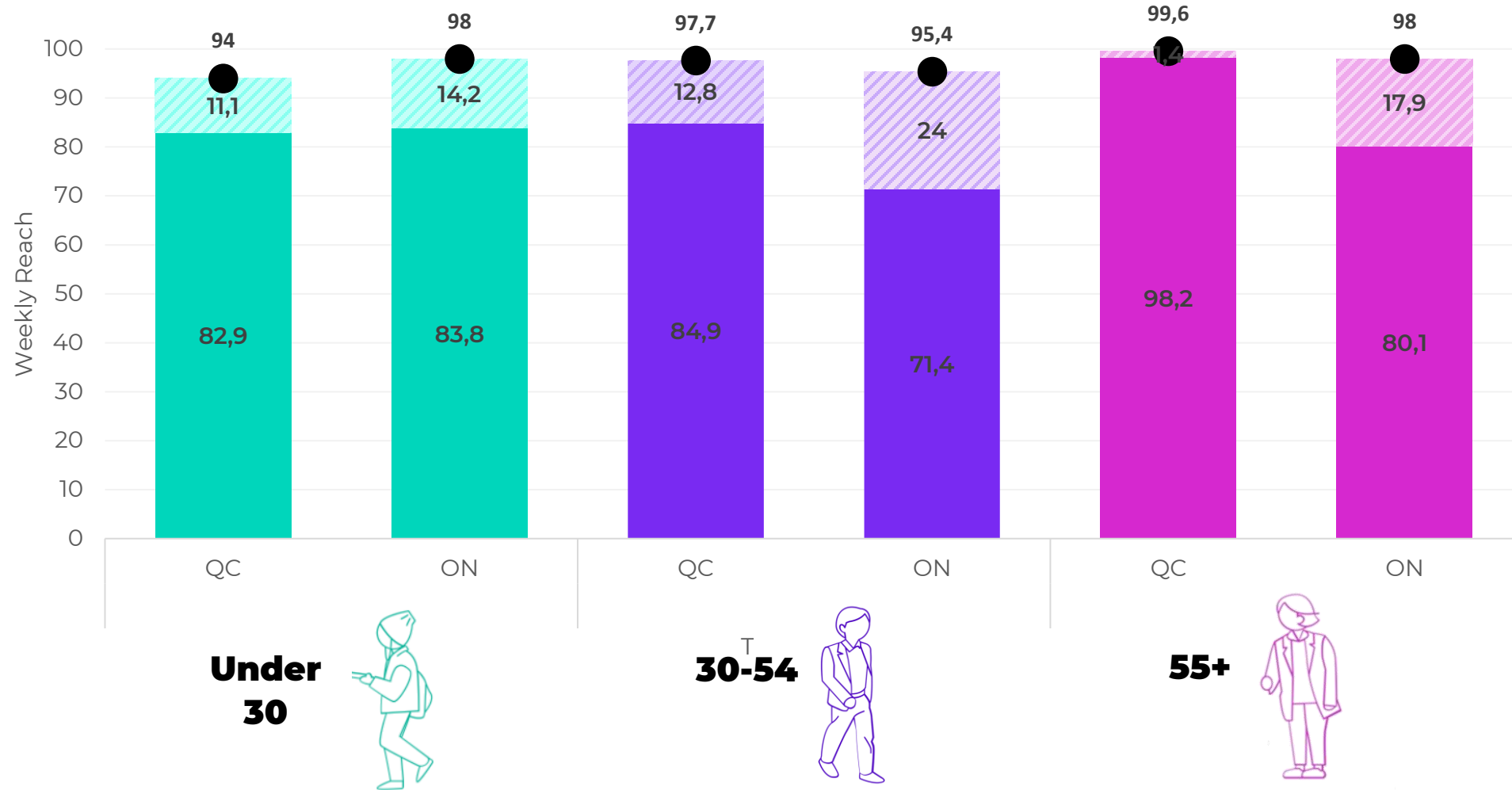
**We think in  
narrative.**

# Video habits are evolving rapidly



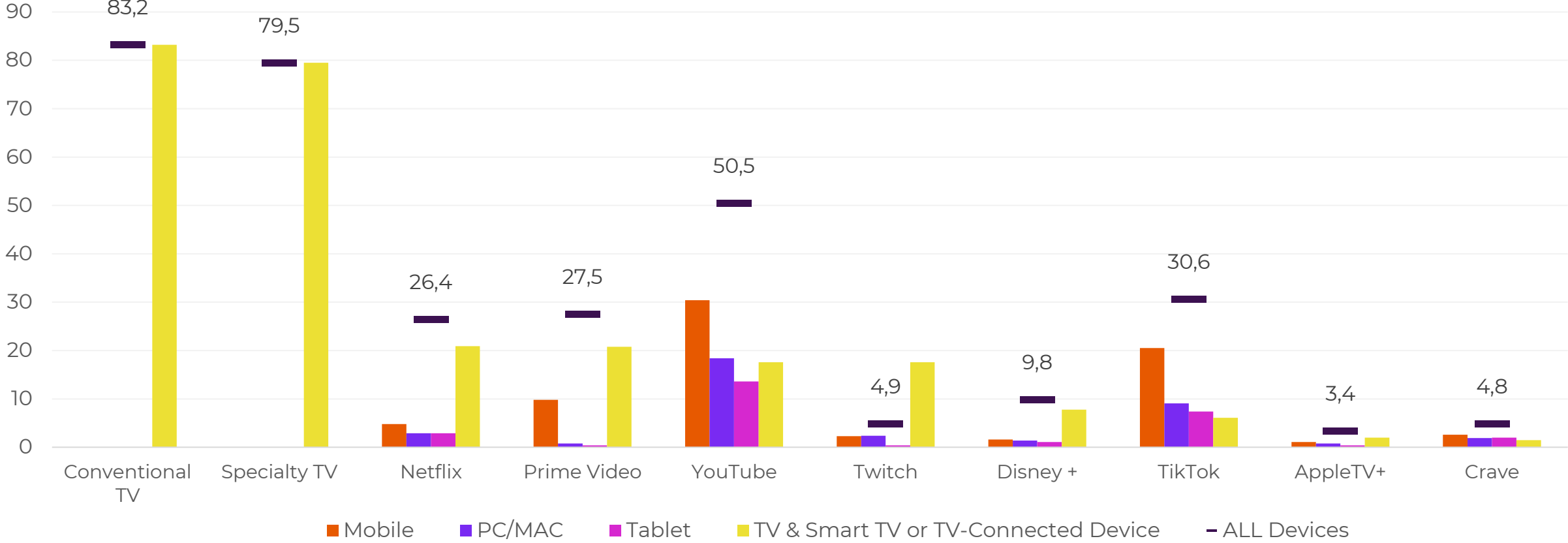
| Content |   |
|---------|---|
| AVOD    | YouTube, Twitch TV, TED, Daily motion                             |
| SVOD    | Netflix, Crave, Disney PLUS, Amazon Prime Video, AppleTV Plus,    |
| BVOD    | Bell, CBC/Radio-Canada, Corus, Québecor, Rogers, Télé-Québec, TV5 |

# Similar Appetite for Video – Different Tech Adoption



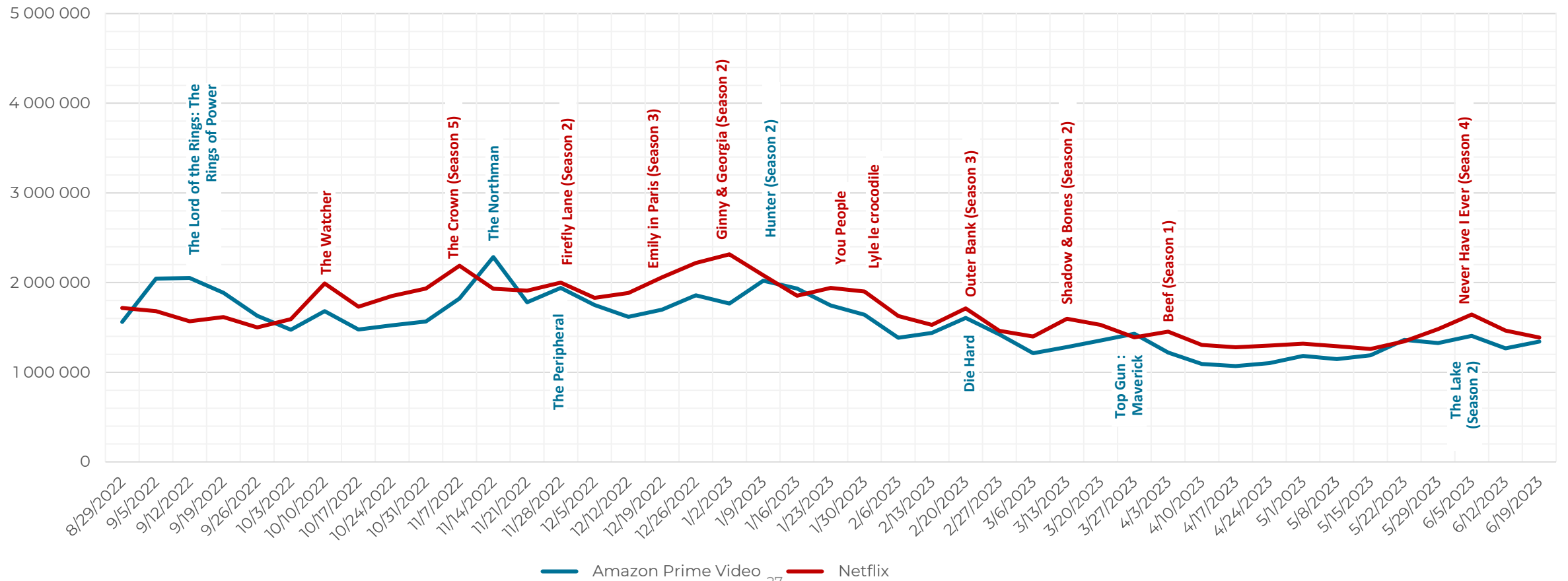
# Platforms differ in their device distribution

Video Weekly Reach by Device A18+

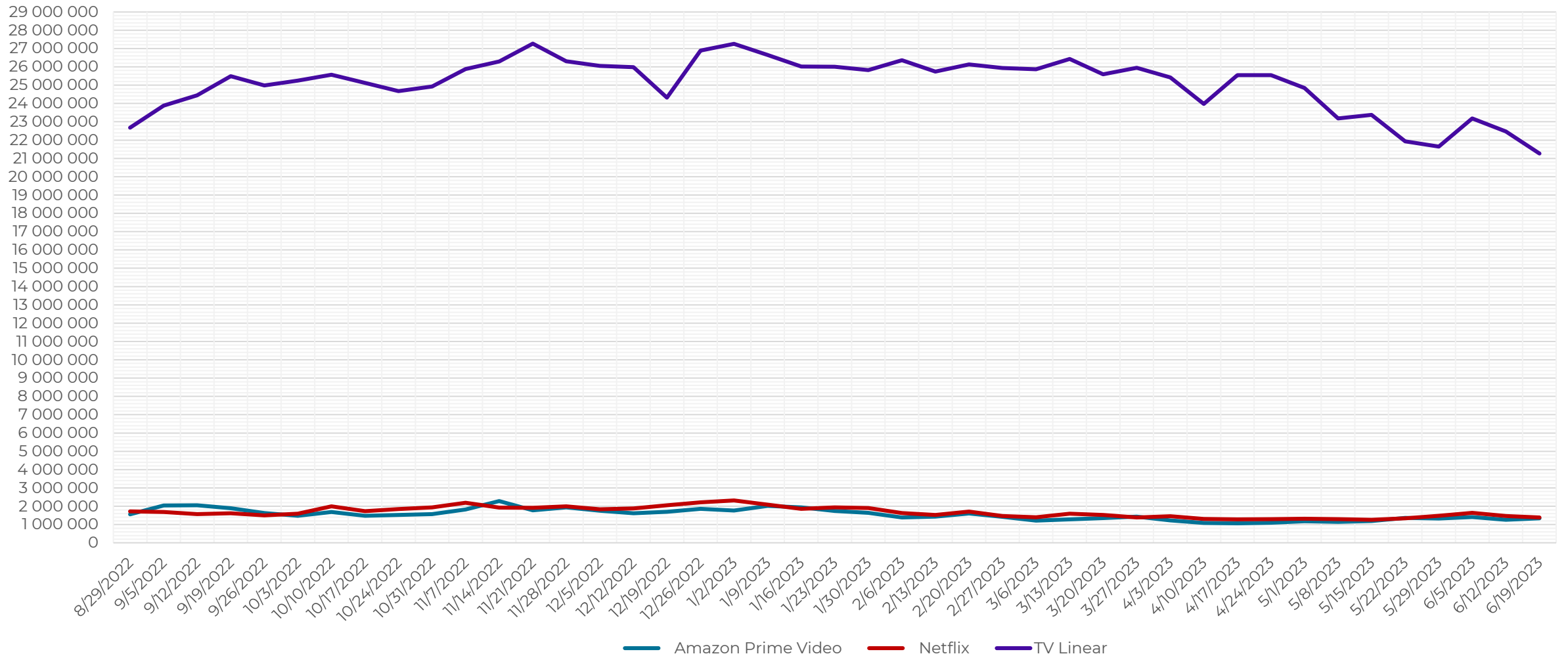


Source: Numeris VAM, Mar 27 to June 25, 2023

# Content releases drive audience behaviour

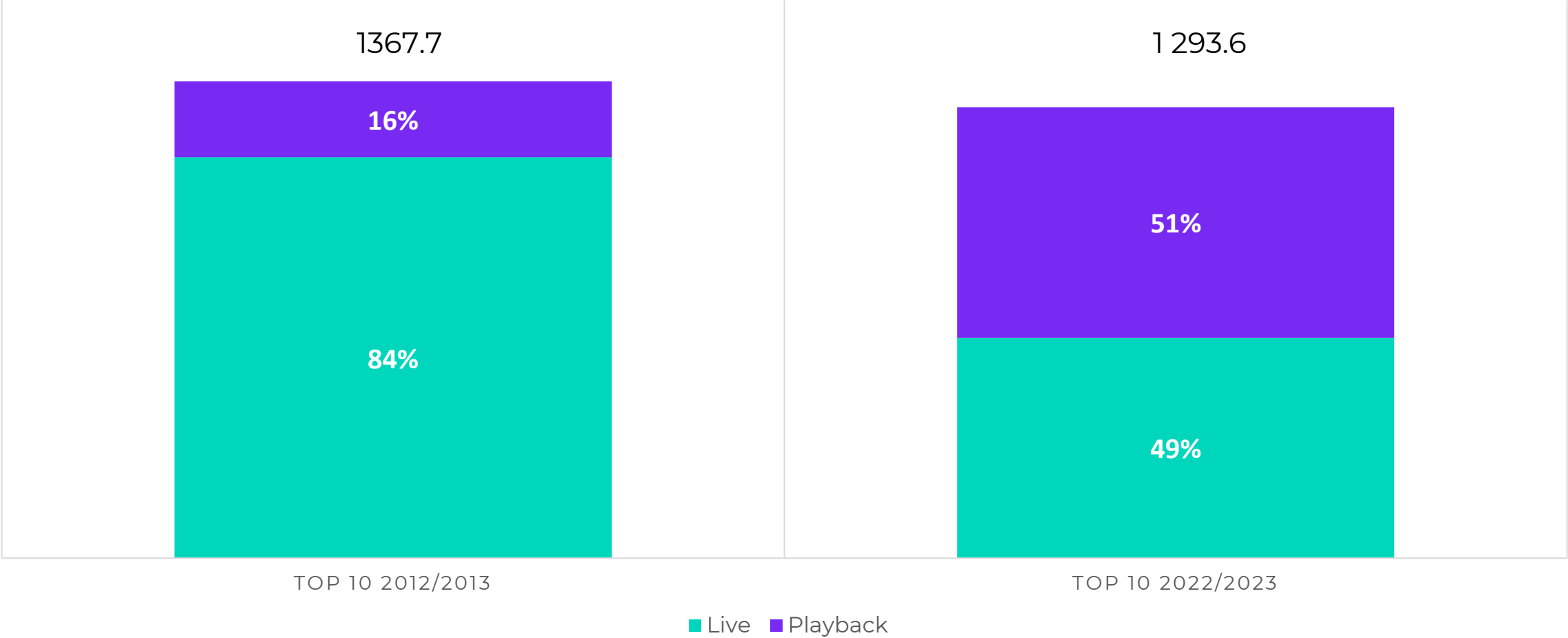


# Linear TV maintains more scale and consistency



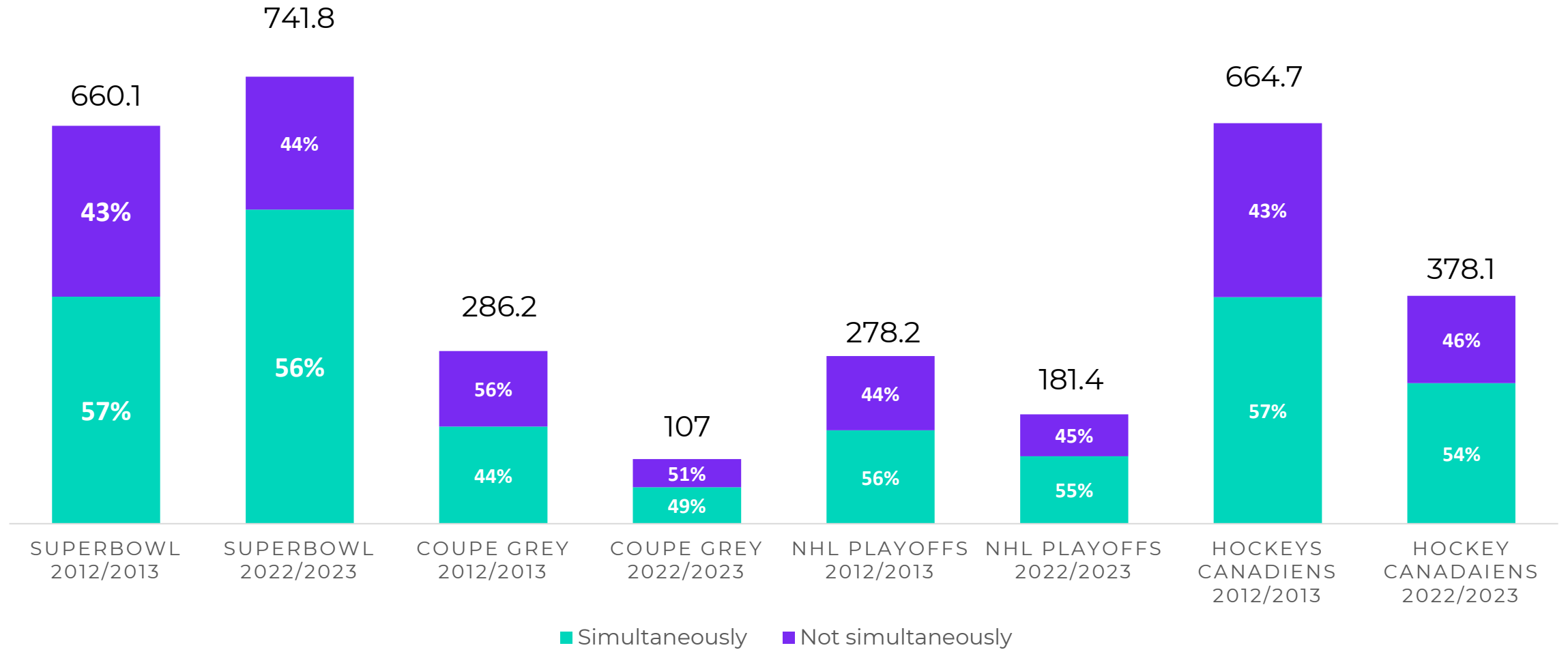
# Top TV 'shows' are resisting TV audience erosion but Playback accounts for half of the viewing

AVERAGE TOP 10 AMA (000)



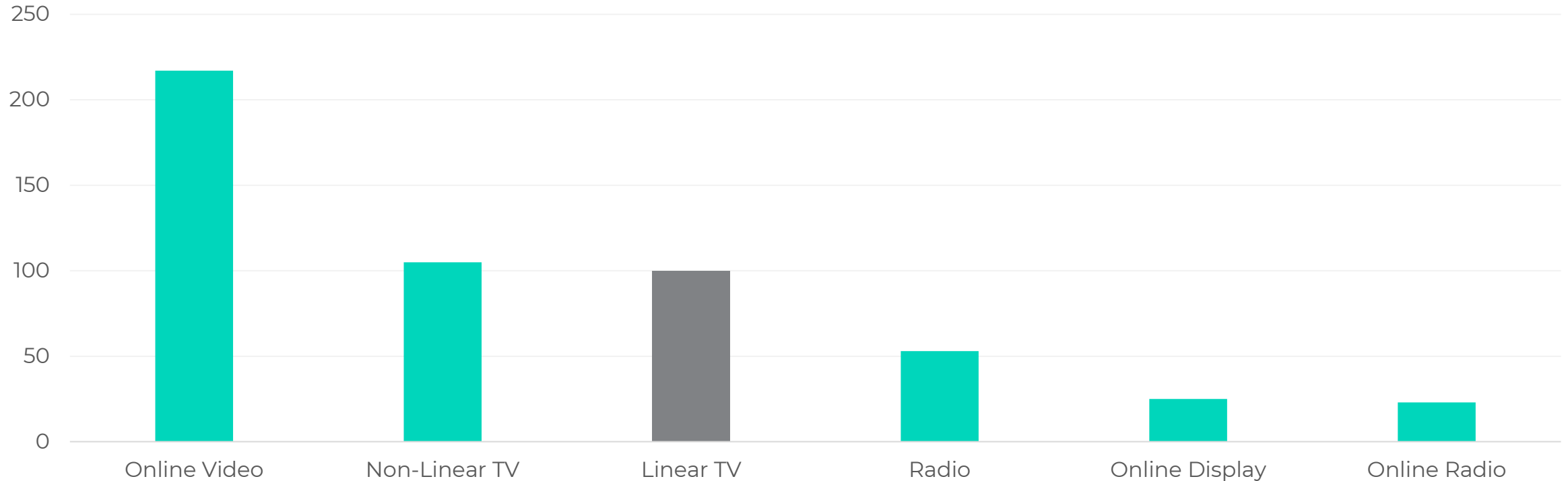
# Sports on linear TV has been impacted as well

SIMULTANEOUS VIEWING AVERAGE AMA A18+

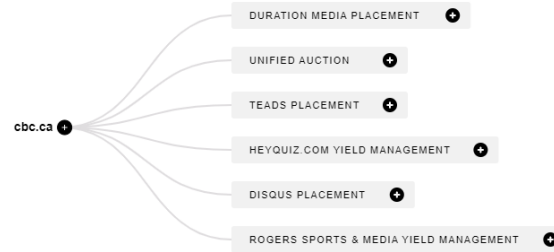
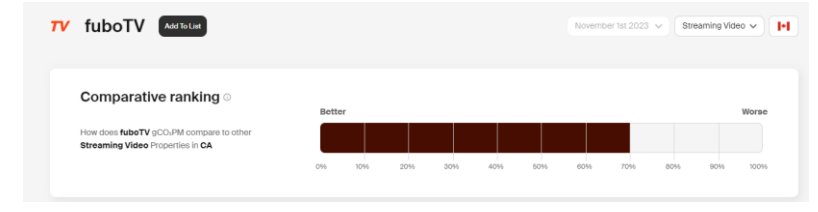
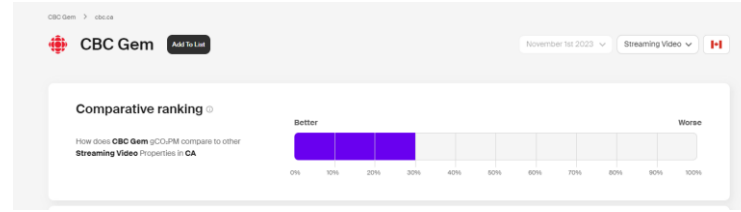


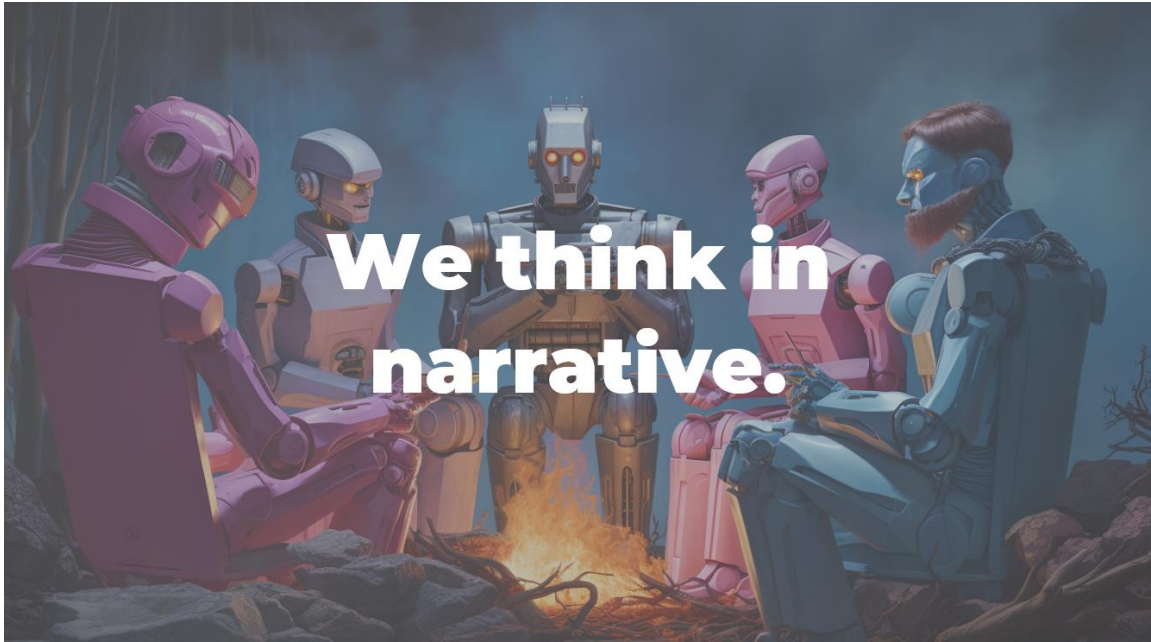
# Last year we showed how carbon intensity varies by medium

gCO<sub>2</sub> /1,000 seconds (Index 100 = Linear TV)



# Carbon efficiency is an increasingly critical consideration





Canadians crave long and short video stories

TV is the main device for narrative

Platforms are scheduling some of their content to create hype

Broadcasters are trying to adapt their offer and fighting for scheduled intuition despite live viewing erosion

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**

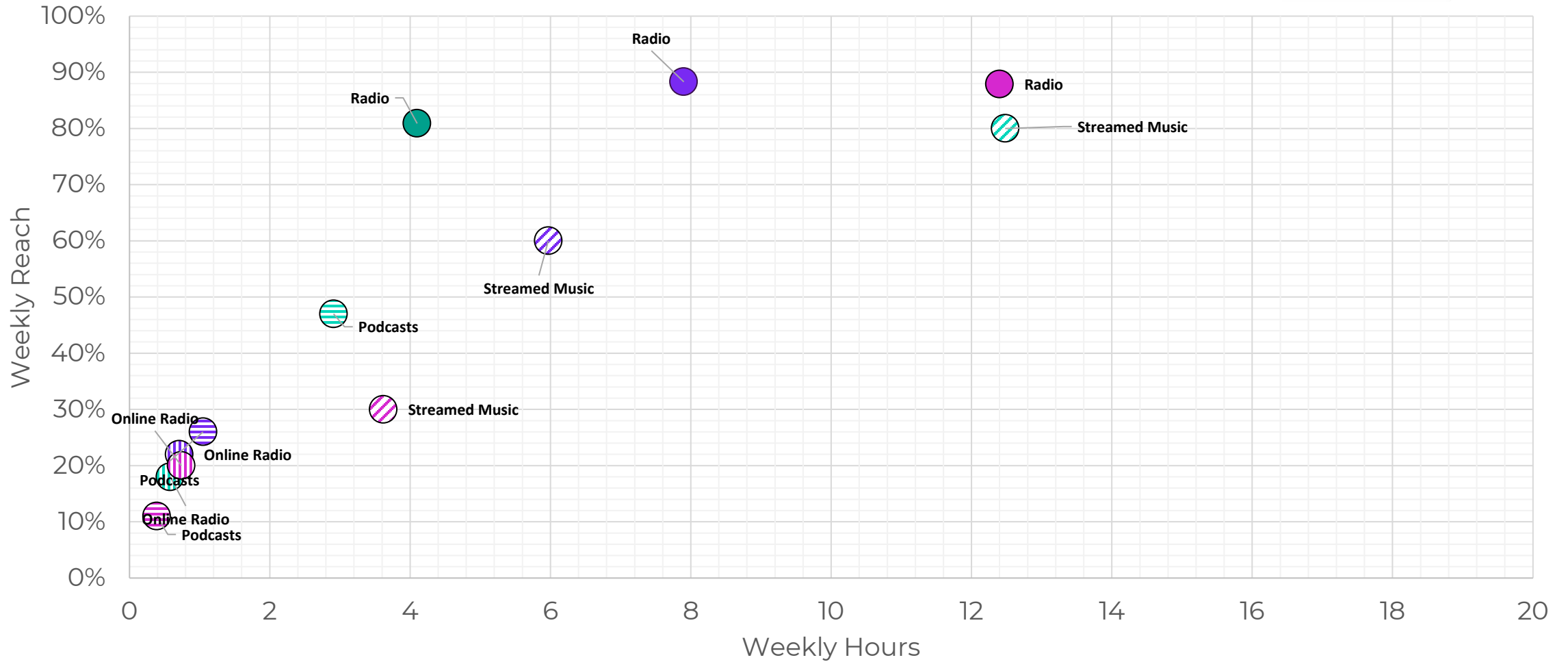
**Under  
30**



**30-54**



**55+**



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

# Habits stay similar



**Under 30**



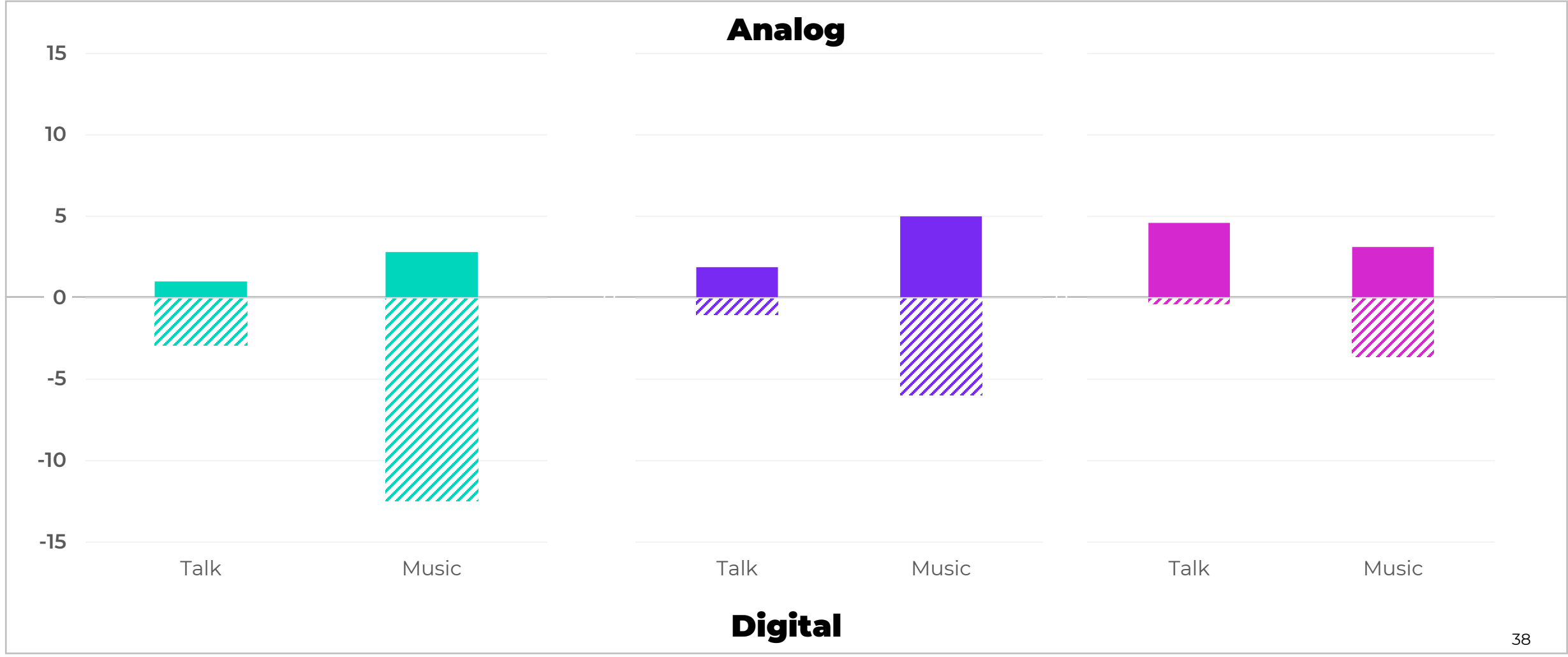
**30-54**



**55+**

**Analog**

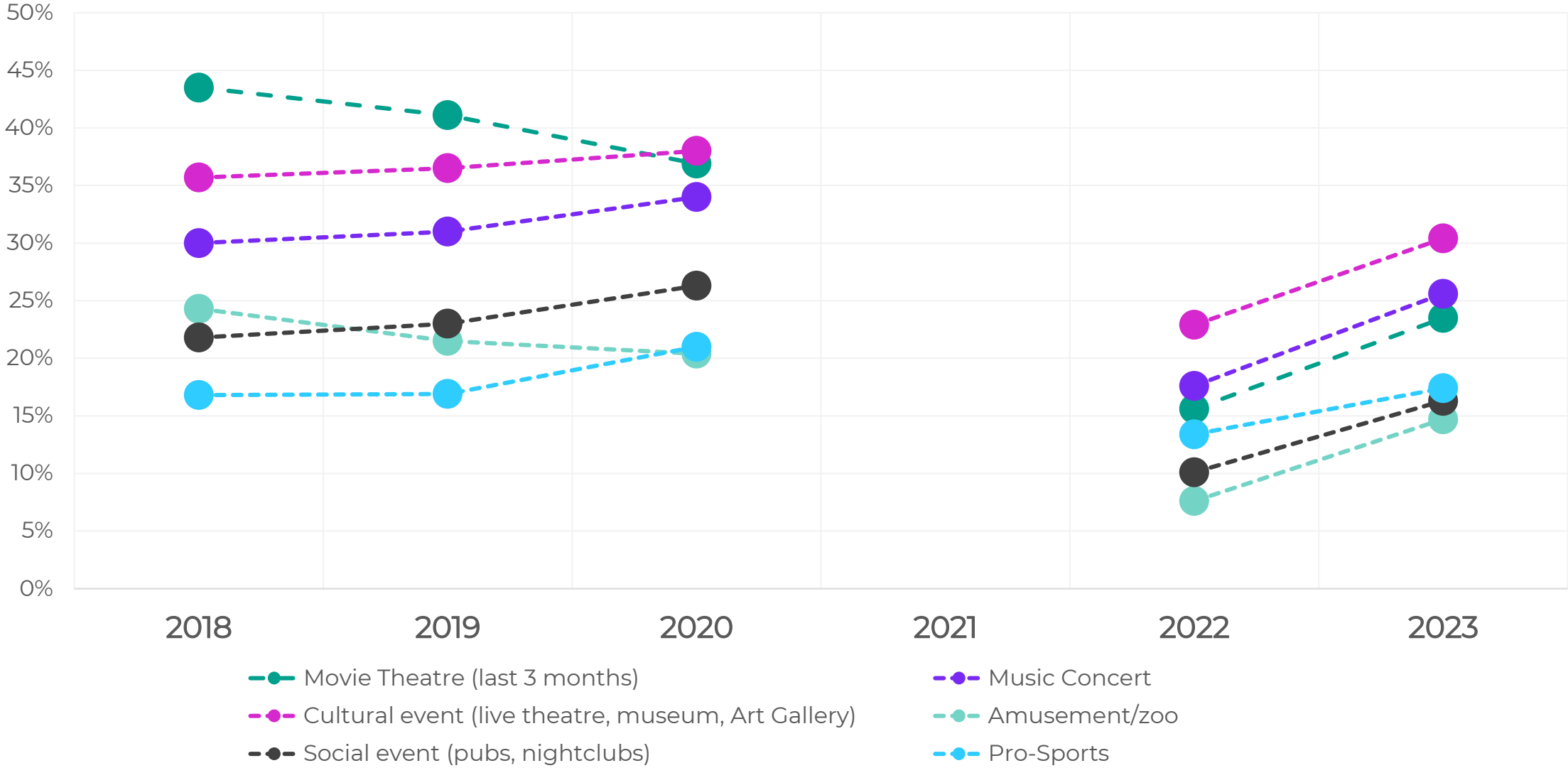
**Digital**





**We think  
through  
imitation**

Adults 16+



Sources: Vividata Fall, 2018 to 2023. Questions were not asked in Fall 2021.

**Under  
30**



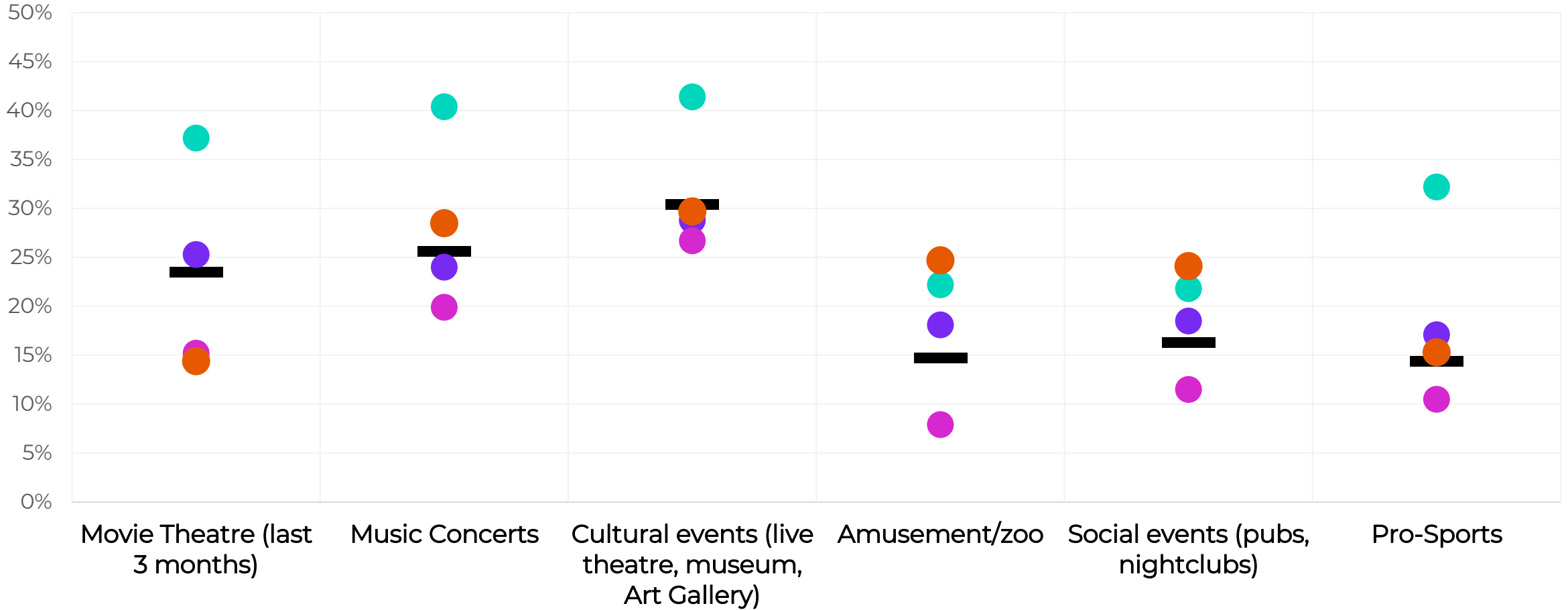
**30-54**



**55+**



**Newcomers  
(<5 years)**



A photograph of two toy robots sitting on a swing set. The robot on the left is teal and the one on the right is purple. They are both smiling and holding onto the chains of their respective swings. The background is a clear blue sky. The text "We think through imitation" is overlaid in white, bold, sans-serif font across the center of the image.

**We think  
through  
imitation**

Covid disrupted the way Canadians live through content and events

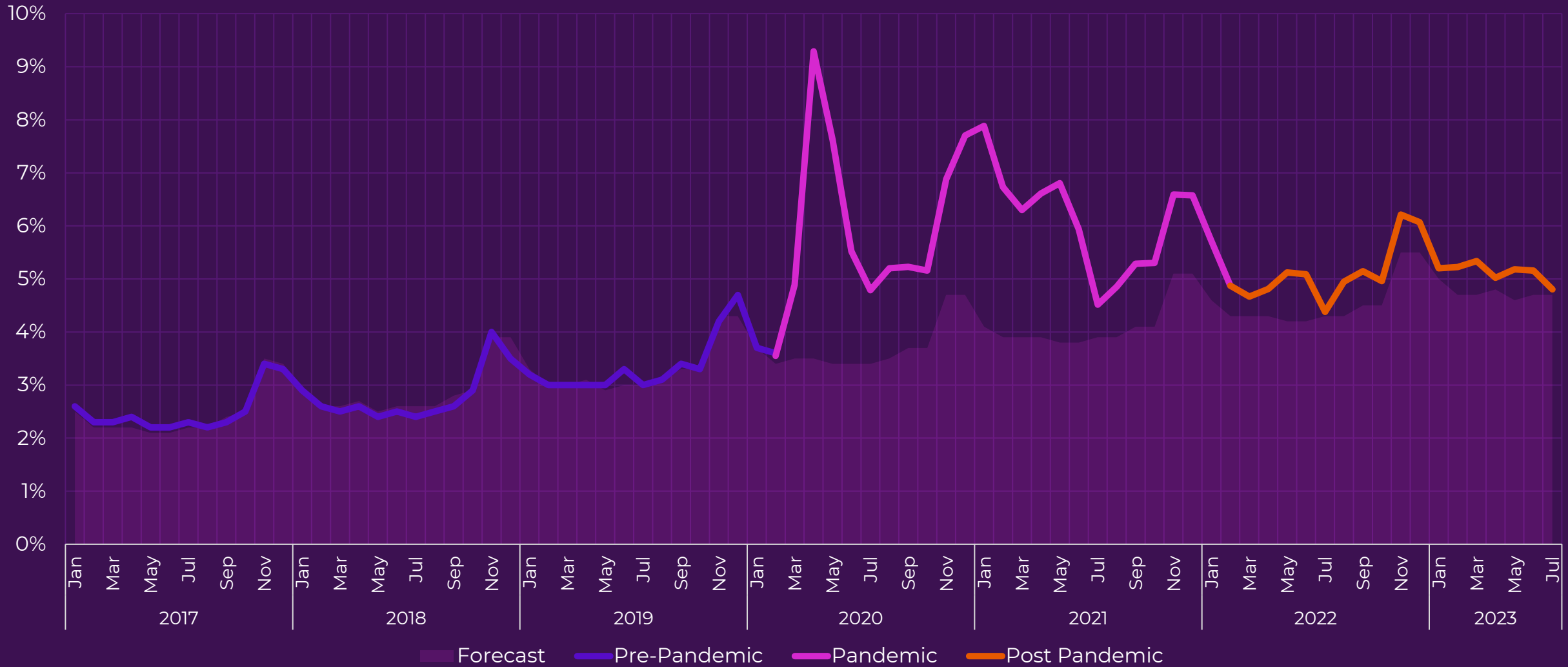
There is a growing interest to participate in live events, but attendee levels remain lower than pre-pandemic period

Youngest generation and newcomers are the first ones to (re)live cultural and sport experiences

A futuristic blue robot with a square head and a screen for a face is pushing a shopping cart filled with groceries through a grocery store aisle. The robot is wearing a blue suit with various panels and sensors. The background shows shelves stocked with various products, including bags of snacks and boxes. A sign above the shelves reads "BOOCLIX'ACS THE REAL WORLD LIVES". The text "We think in physical spaces" is overlaid in large white letters.

**We think in  
physical  
spaces**

# Share of Retail Sales Occurring Online



# Time Spent – Shopping Categories



**Under  
30**



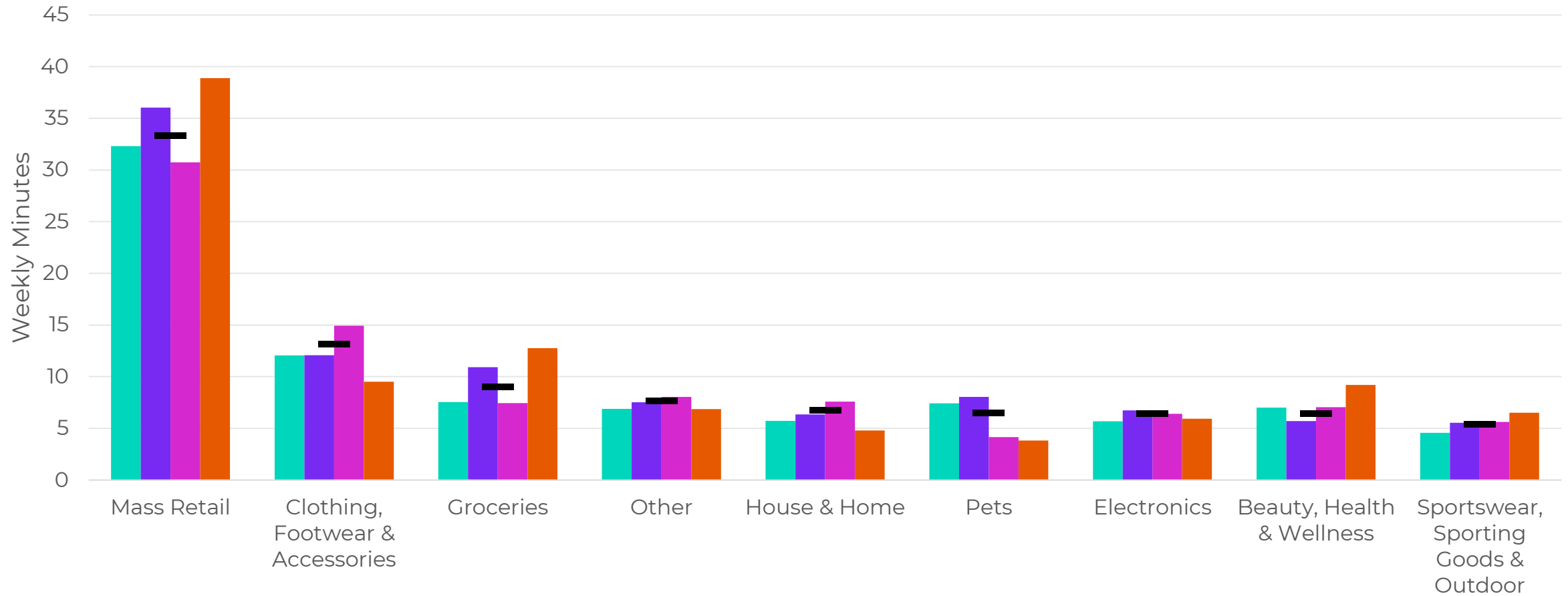
**30-54**



**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

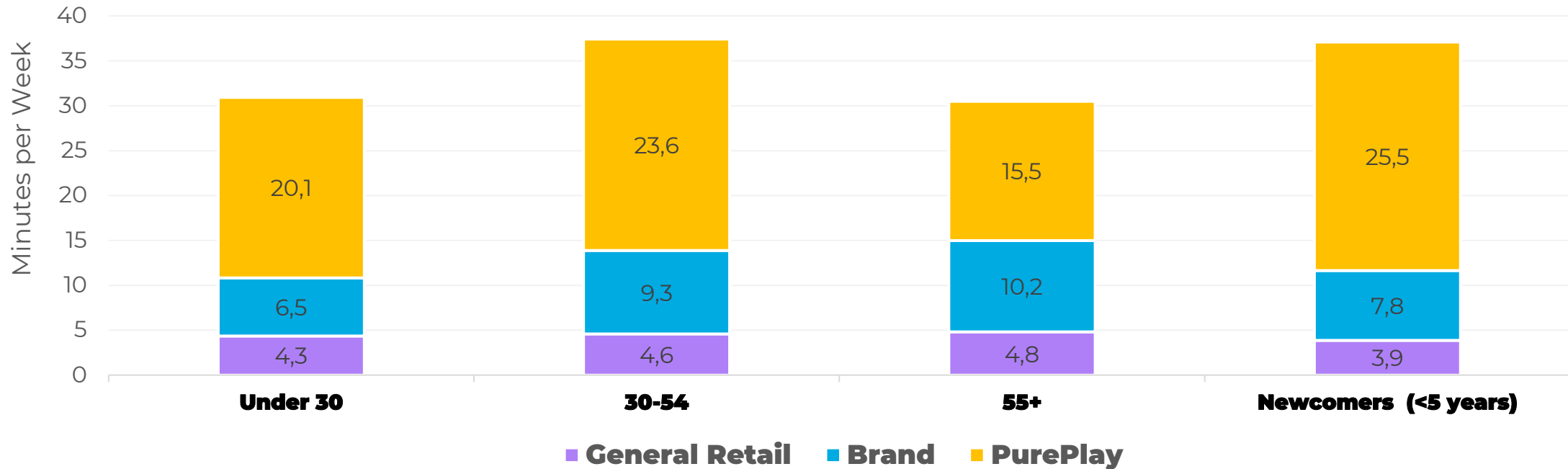


**\$173**

Online spent  
past month

# Pureplay Retailers Dominate Time – especially amongst younger groups

Time Spent on Shopping Sites/Apps





**We think in  
physical  
spaces**

eCommerce growth is back on pre-pandemic trend

Canadians are spending 90 minutes on average shopping online... every week

Pureplay players have great power of attraction

Two humanoid robots are seated at a table, facing each other. The robot on the left is wearing a light blue, fringed jacket and a silver, dome-shaped helmet with a circular sensor. The robot on the right is wearing a dark blue, fringed jacket and a similar silver helmet. They appear to be in a formal setting, possibly a dining room, with a dark wood table and a dark wood chair visible. The background is a dark, textured wall.

**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.



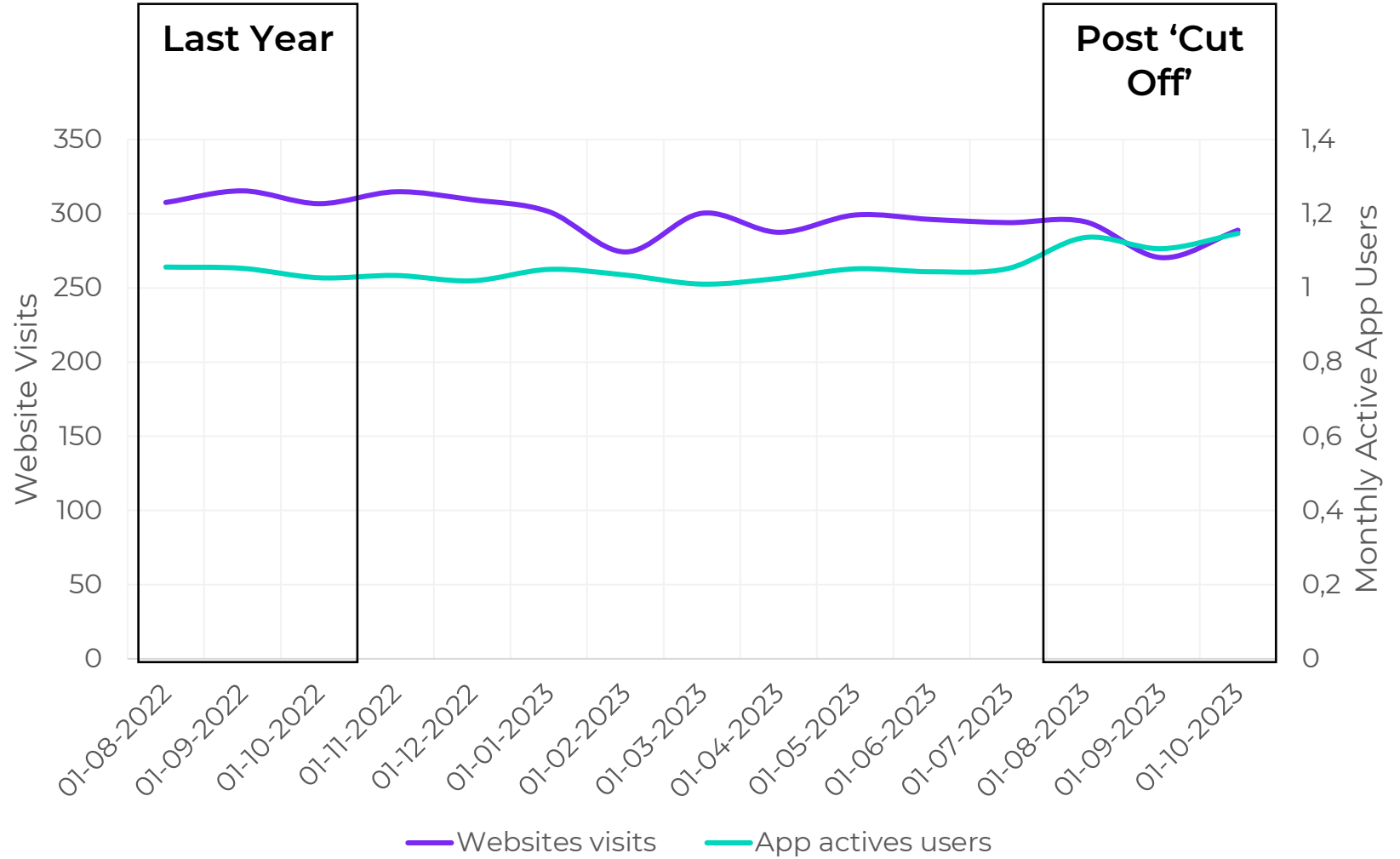
## August 1st

Meta starts blocking access to Canadian news



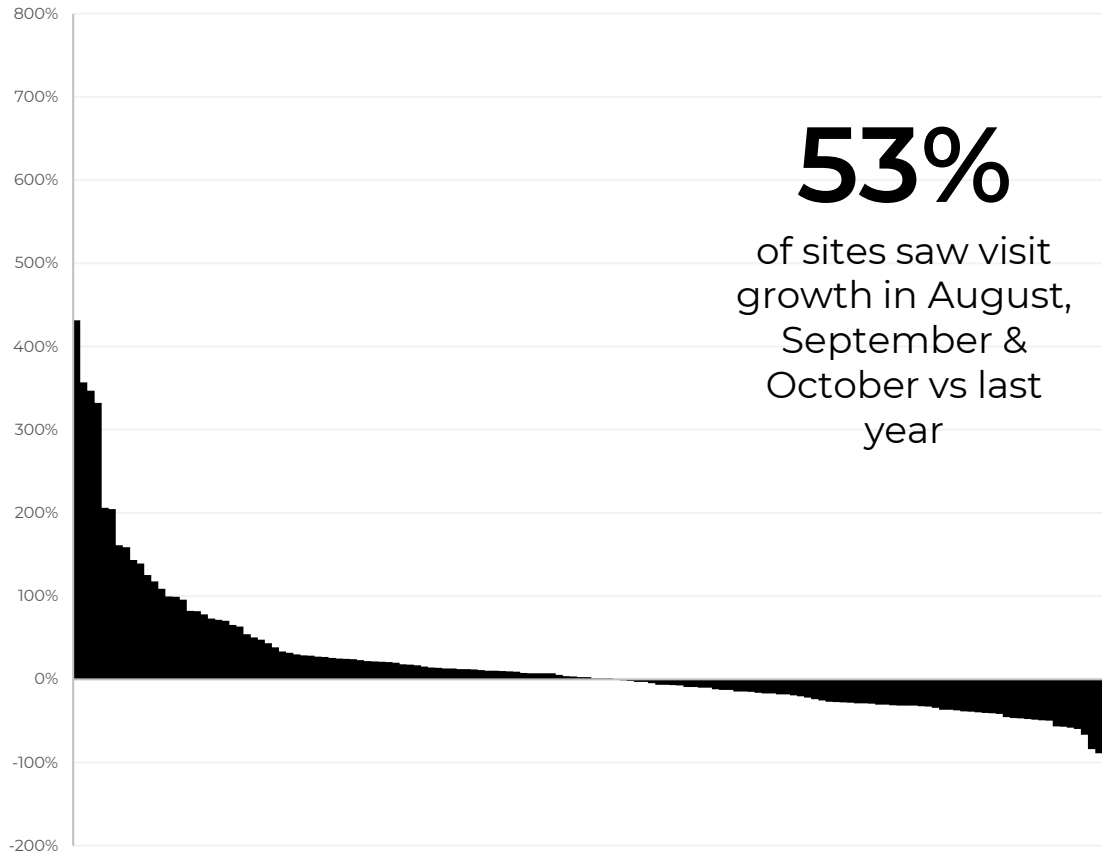
# News traffic declined – but not dramatically

|               | Vs. Previous 3 Months | Vs. Same Period Last Year |
|---------------|-----------------------|---------------------------|
| <b>Web</b>    | <b>-4.0%</b>          | <b>-8.1%</b>              |
| <b>Mobile</b> | <b>7.7%</b>           | <b>8.0%</b>               |

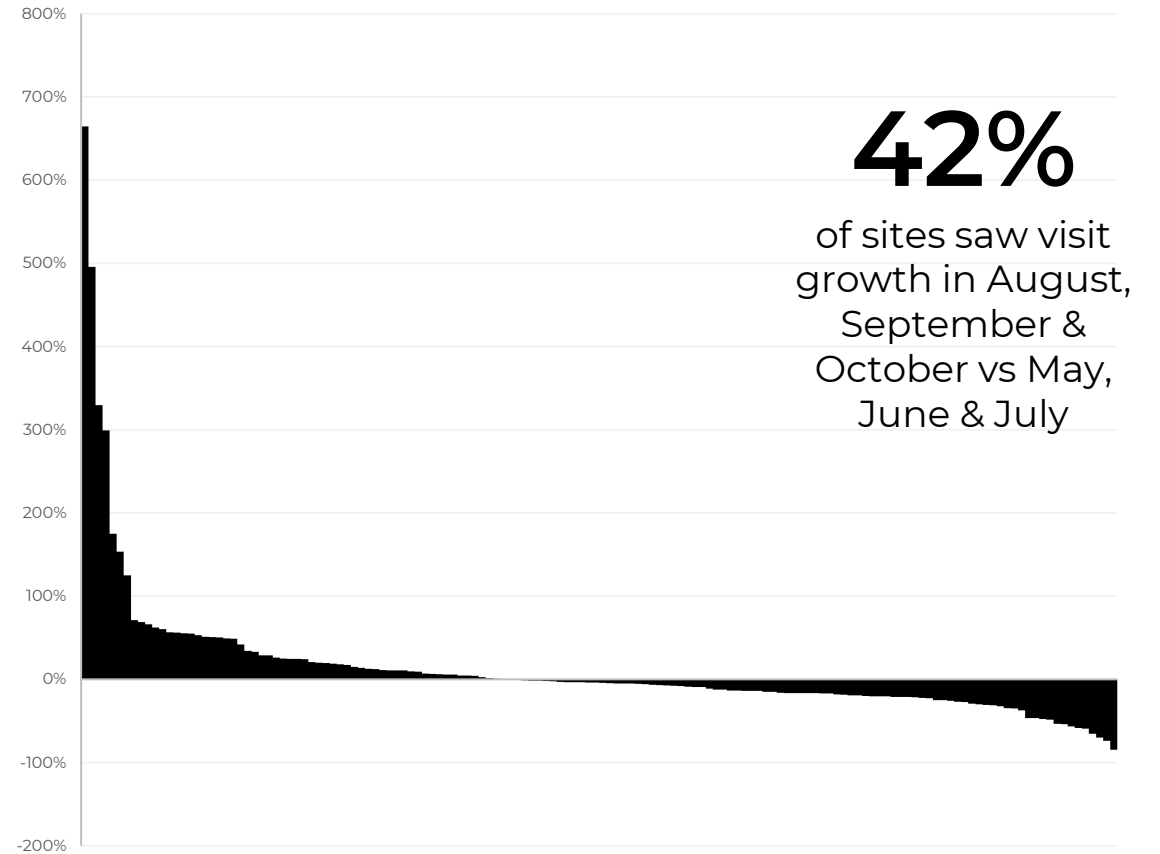


# It's looking like there will be 'winners and losers'

## Change vs Last Year



## Change vs Last Period



## 2 big questions marketers ask:

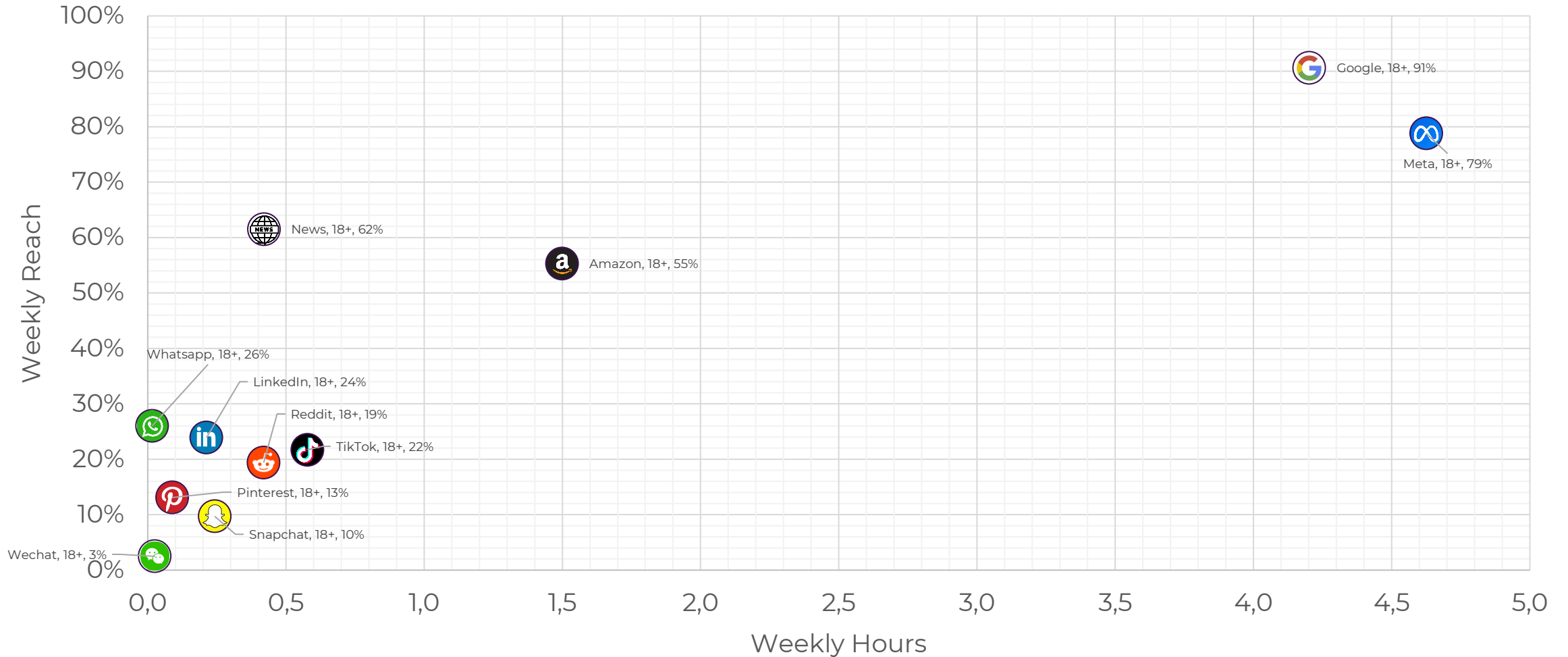
Can I reach consumers with Canadian media?

Media habits vs. Media spend

Is it more expensive to invest in Canadian media?

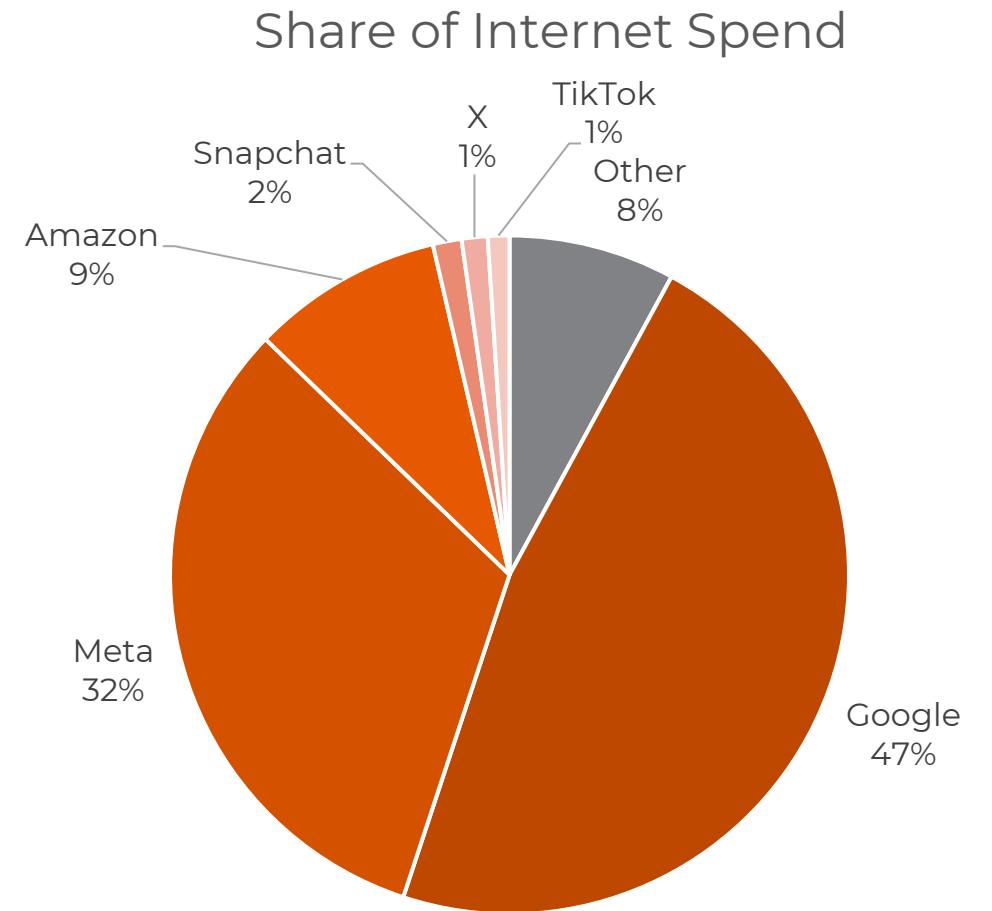
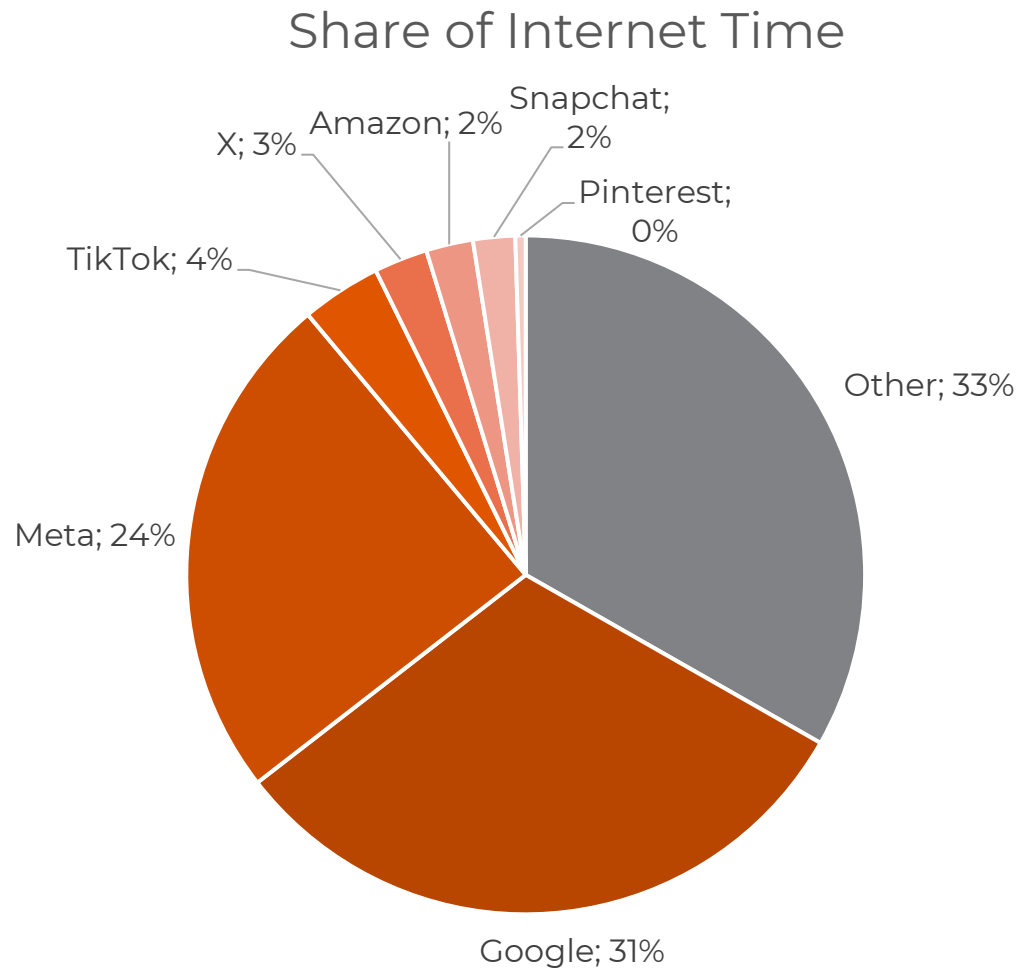
Measurement framework that measures attention and outcomes

# News would be the 3<sup>rd</sup> biggest 'walled garden'



Source: Vividata Metrica Summer 2023, A18+

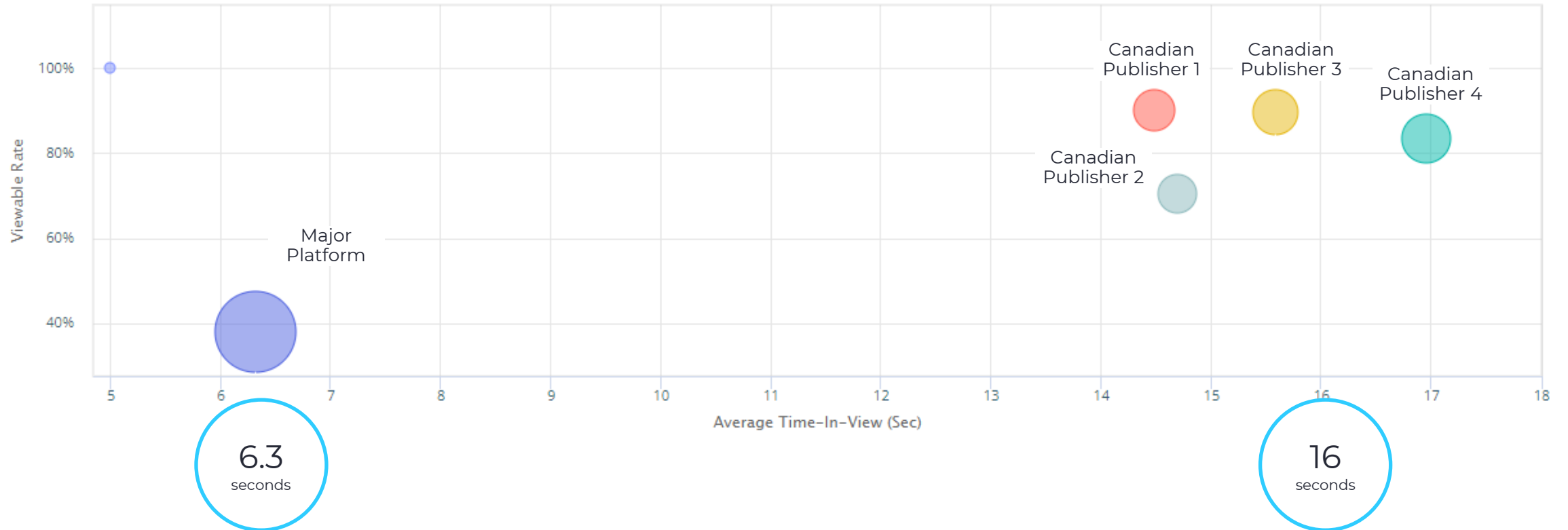
# Platforms get a disproportionate share of internet spend



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

**+ 30%**

YoY media  
Media  
Budget

**- 22%**

CPA vs.  
previous  
year

# 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.



... but dialogue is broken between Canadian government and Meta

News platforms have done a great job attracting Canadians to their sites and apps

As marketers, we must evaluate platform performances beyond cost / impression

