

CMUST 2024

The Canadian Media Usage Study



NUMERIS



NUMERIS
VAM



Media Technology
Monitor



SimilarWeb



EUROMONITOR
INTERNATIONAL



vividata



metrica
by vividata



THE CANADIAN
PODCAST
LISTENER



think tv



PATTISON



VIVVIX



eMarketer

Statistics
Canada



News Media Canada
Médias d'Info Canada

Magazines
Canada



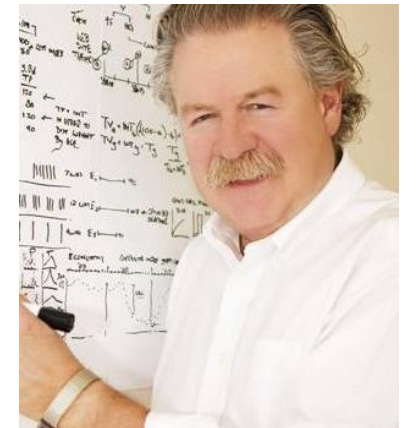
Global Media & Internet
Concentration Project



omni



iab
canada



Time



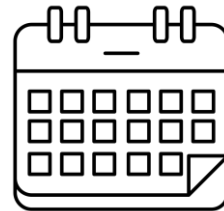
Ad Duration



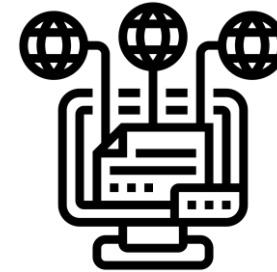
Attention



Timelines



Attribution
Windows



Hourly
Rates

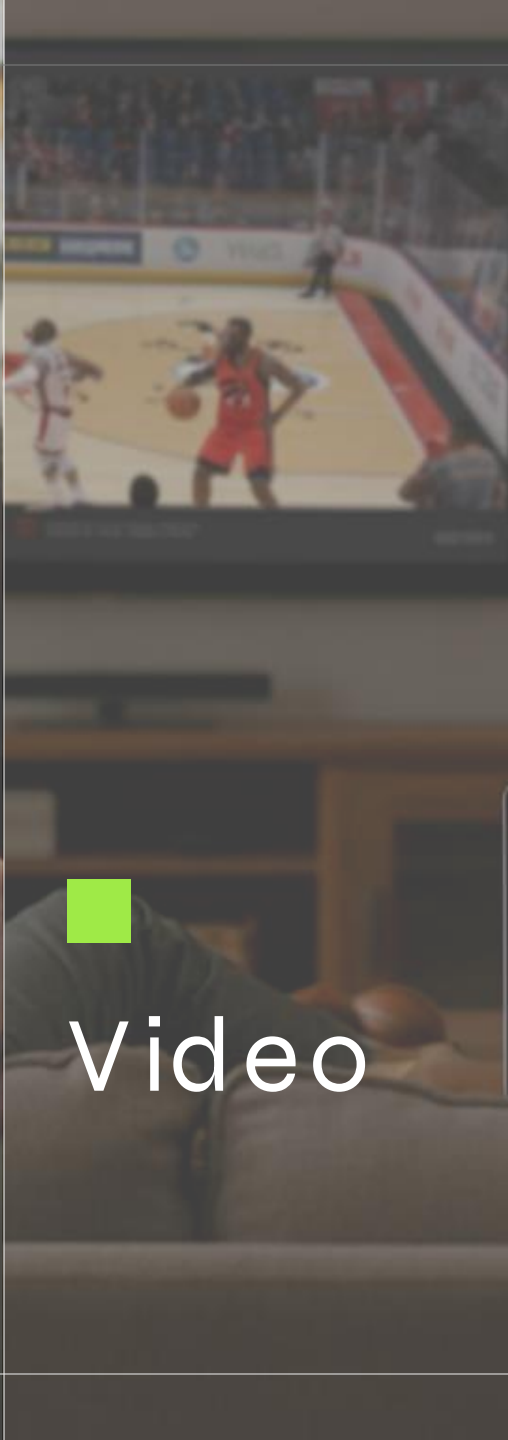


40%
Parallel
Timelines

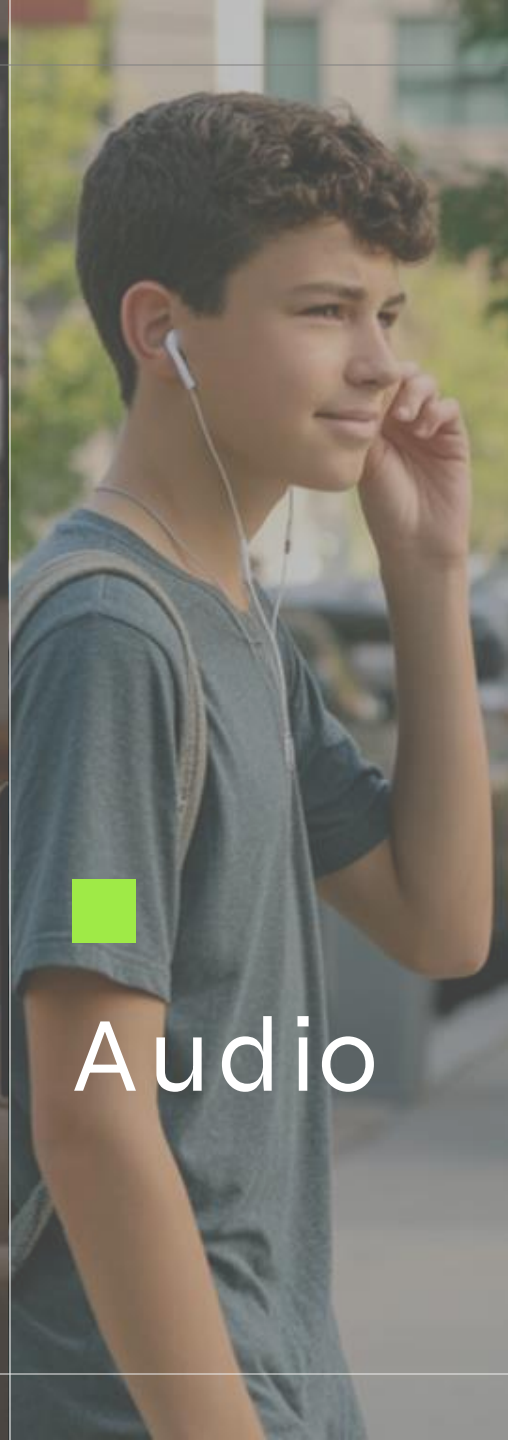
60%
Plots with
Multiverse



Retail
Media



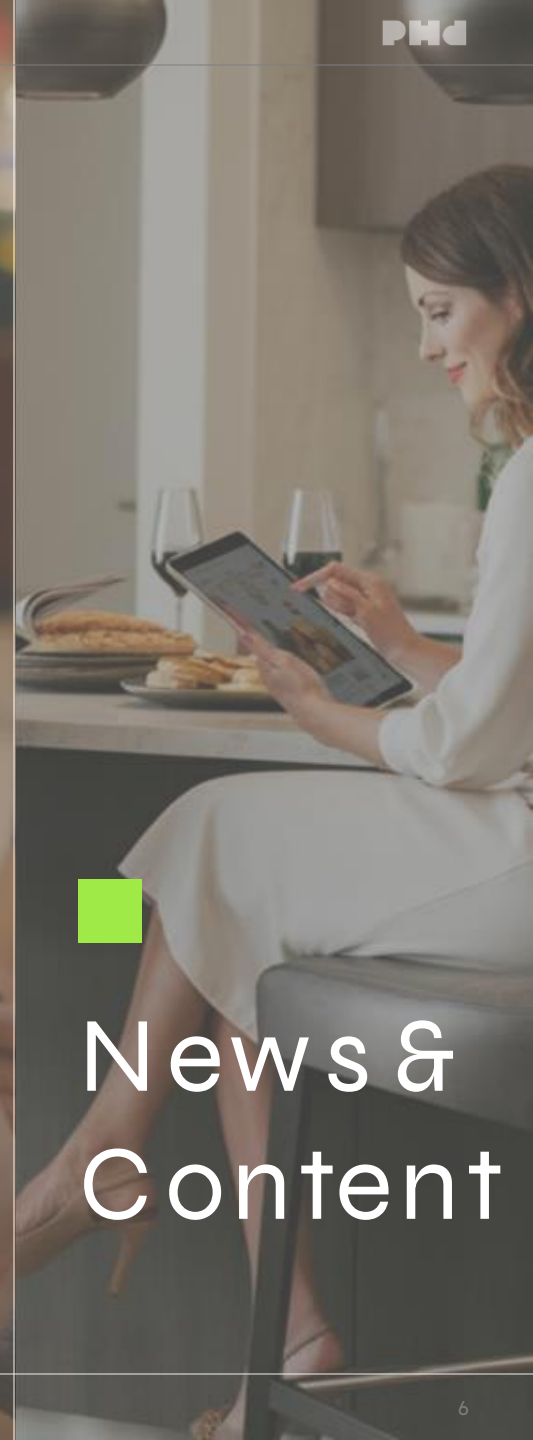
Video



Audio



Social
Media

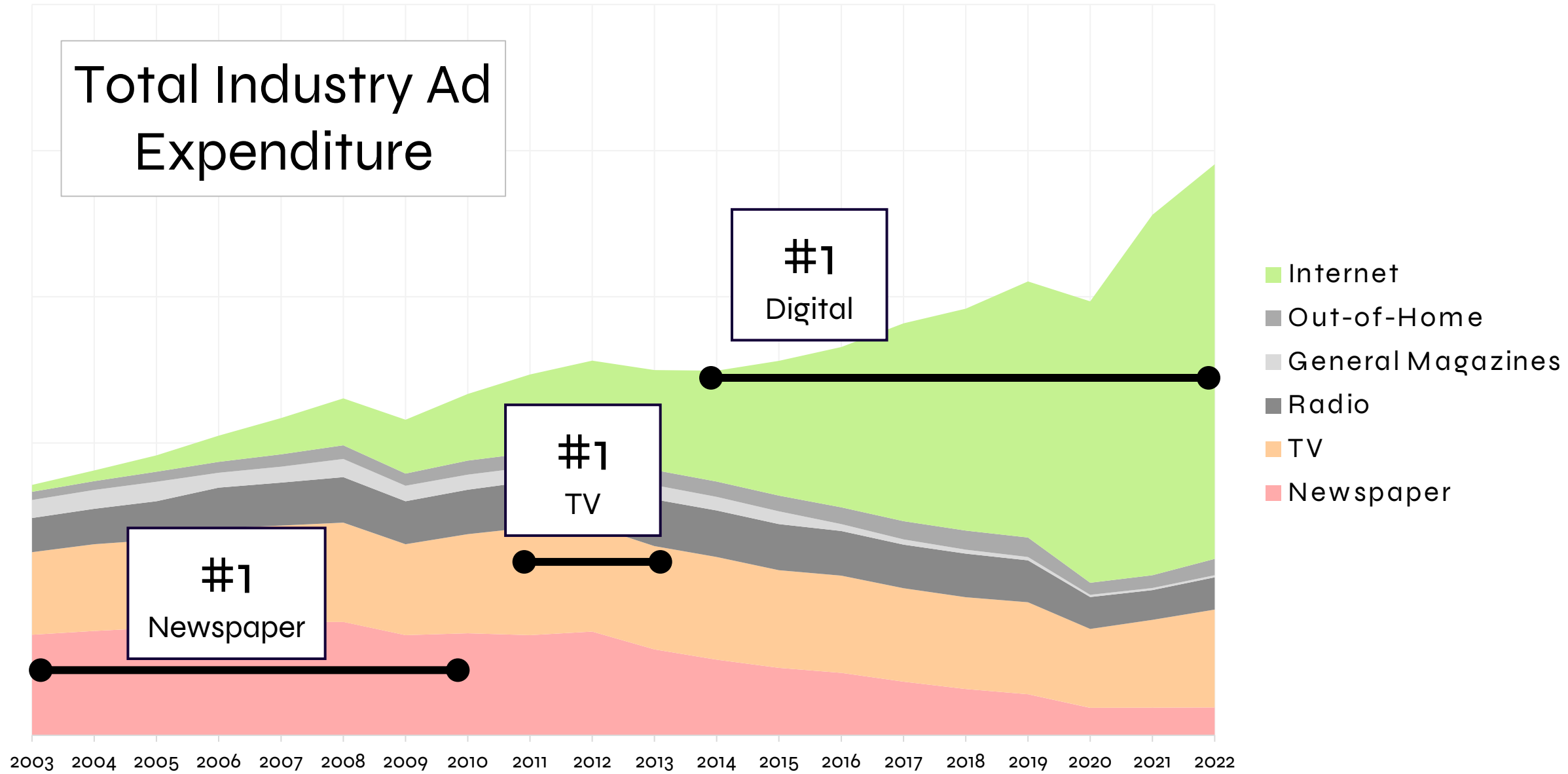


News &
Content

Growth



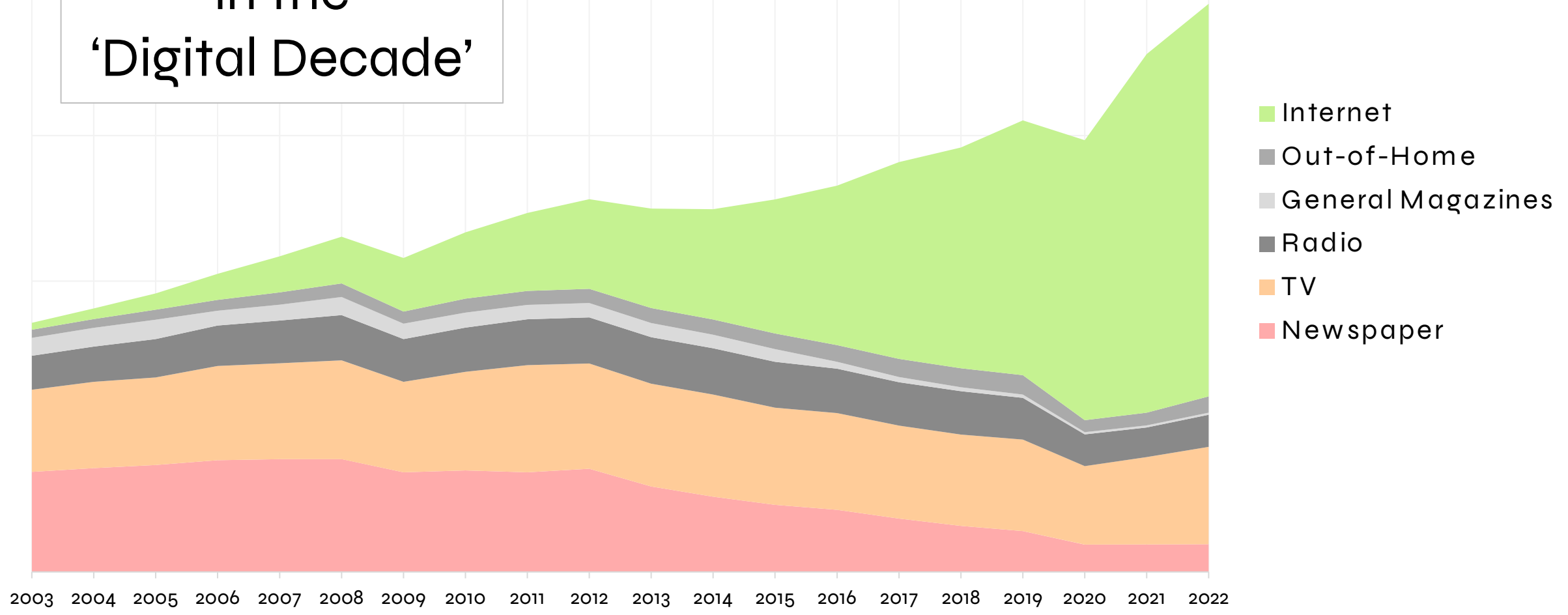
Total Industry Ad Expenditure



Brand Growth in the 'Digital Decade'

2014
1/3 of ad spend is digital

2023
>2/3 of ad spend is digital



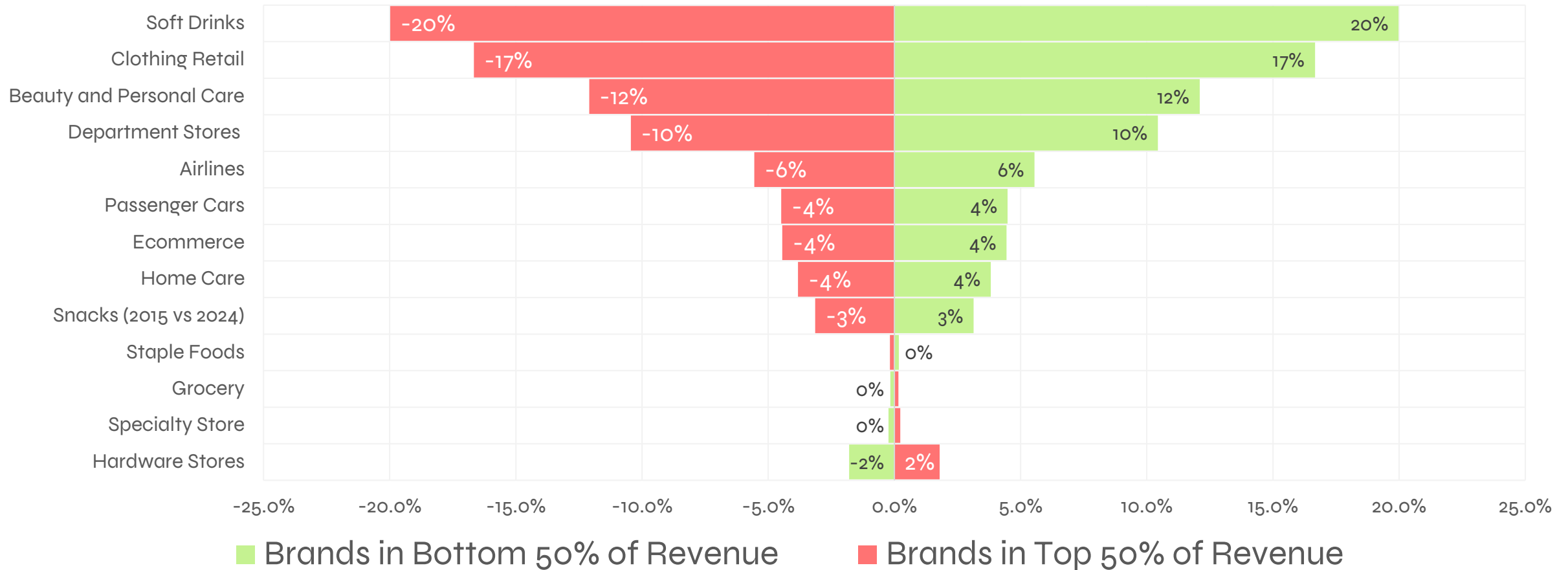
14 Categories

400+ Brands

10 Years

On Average: Big Brands Lost. Little Brands Gained.

Aggregate Market Share Change by Size of Brands: 2014-2023



Big Brands that invested more in (offline) media tended to see more growth

8 out of 14

Categories showed a clear relationship between sustained
offline share of voice and brand growth

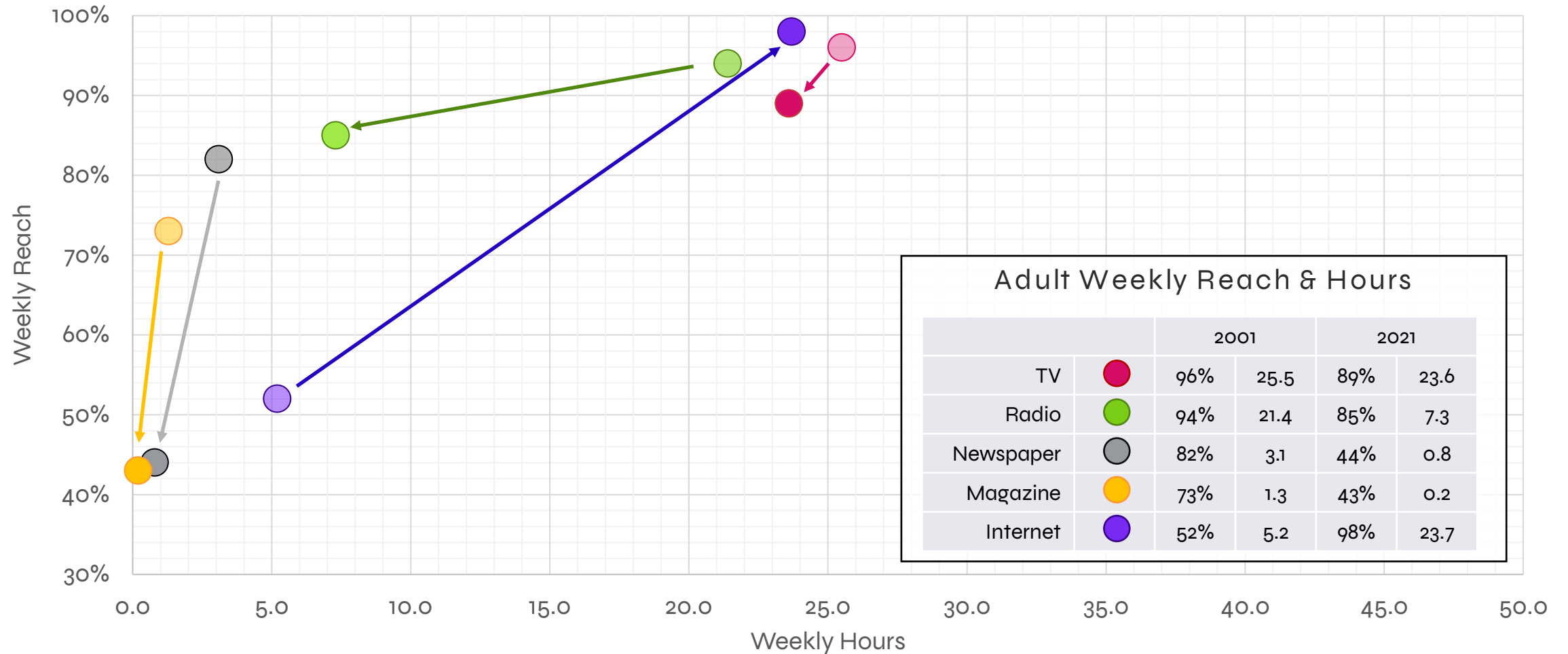


**Big Brand
Approach:**
Consistency
Mass Targeting
Investment

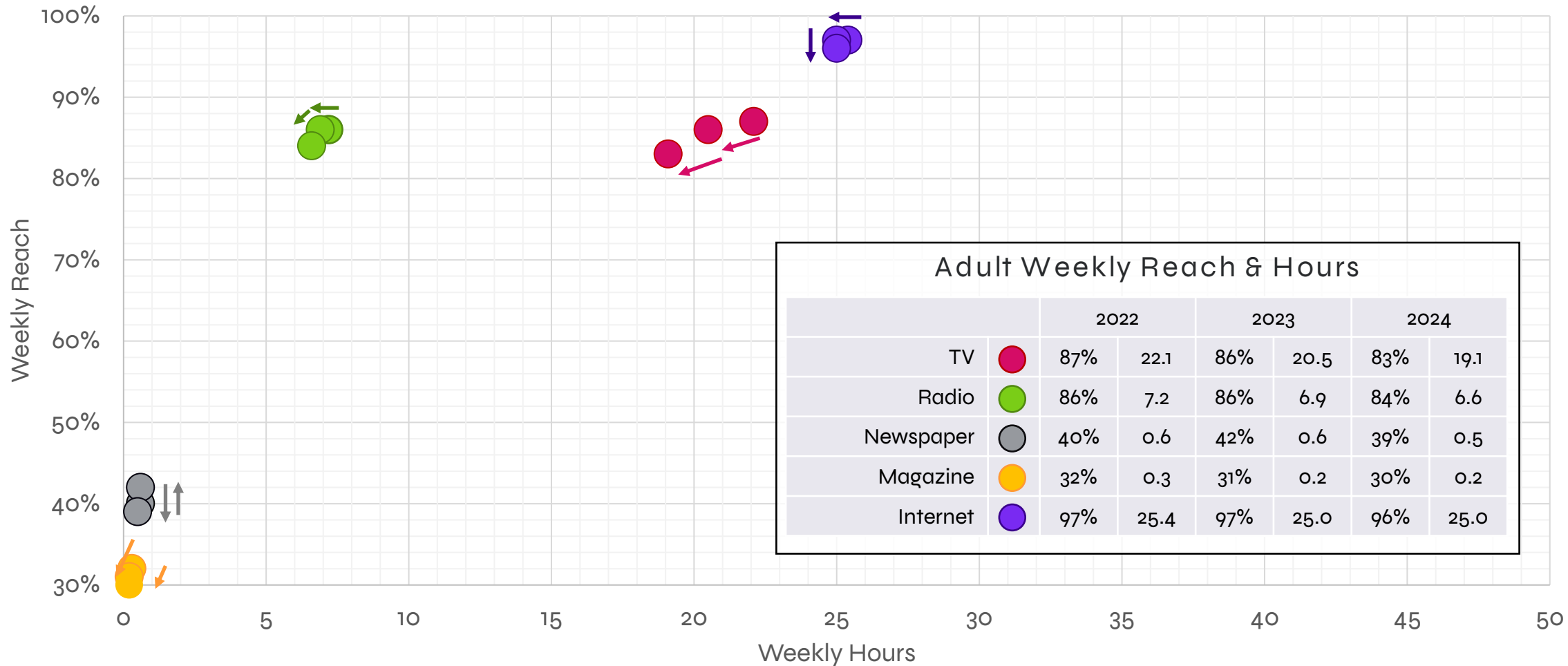


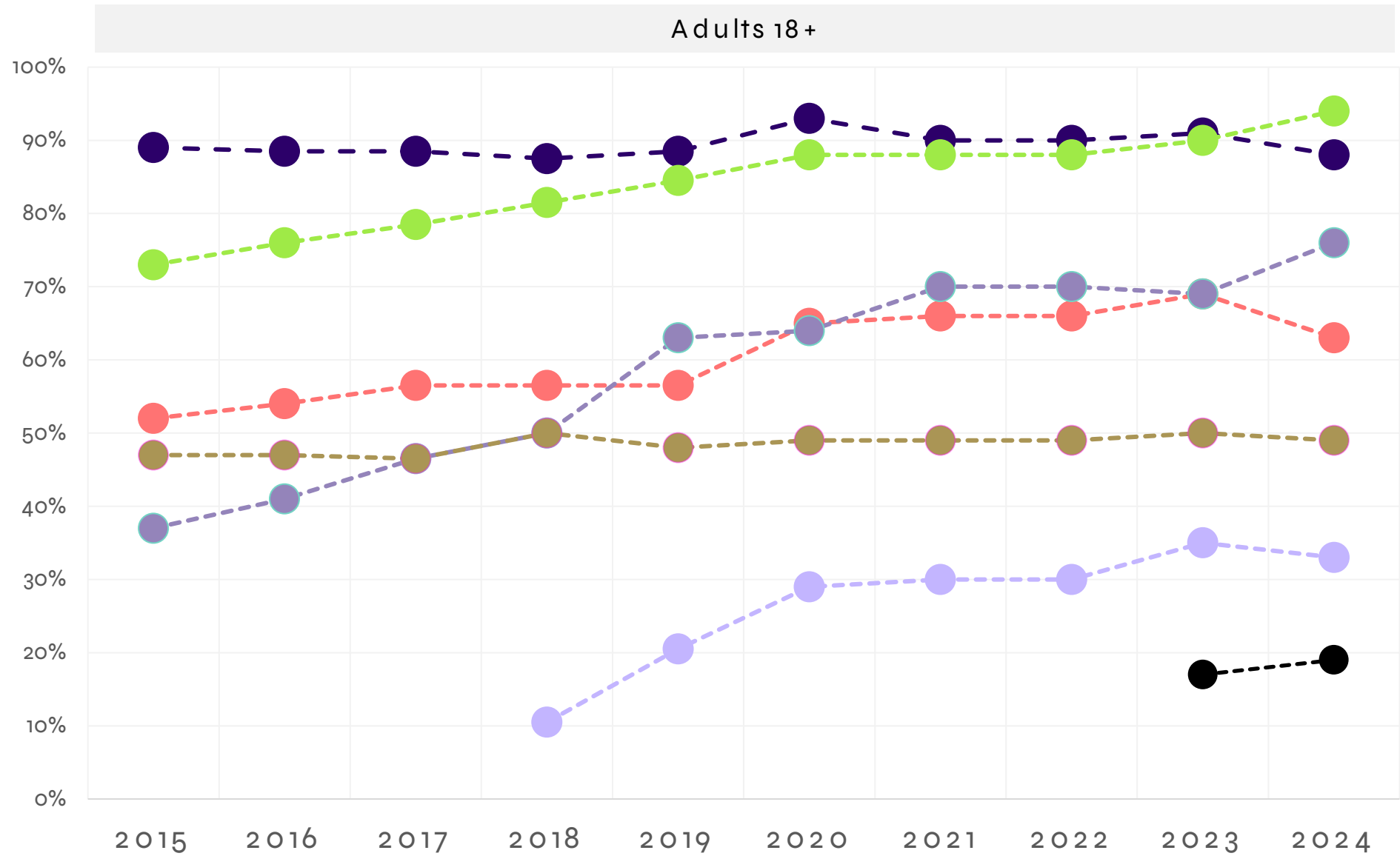
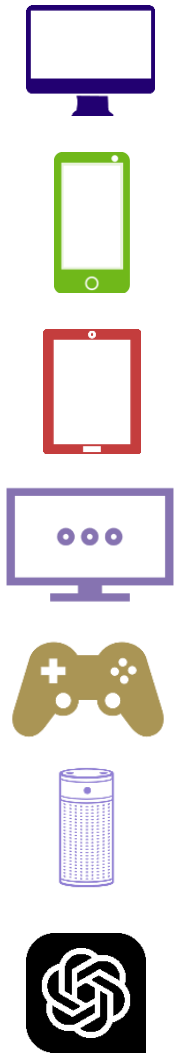
**Small Brand
Approach:**
Responsiveness
Narrower Targeting
Disruption

A 20-year trend



The last 3 years: Linear TV continues it's decline







**Under
30**



30-54



55+



Anxiously Affluent



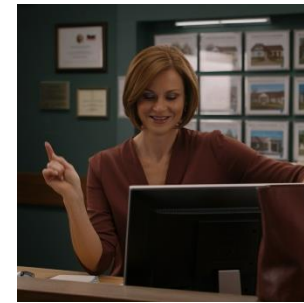
Busy Breadwinners



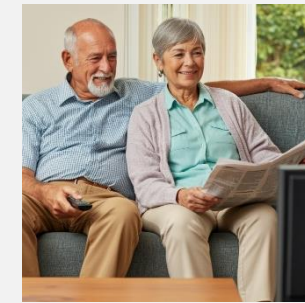
Modestly Content



Musically Happy



Relaxed Retirees



Size & Median Age

5 MM (16%)
Age 39

8.9 MM (28%)
Age 46

5.6 MM (17%)
Age 50

3.1 MM (10%)
Age 51

9.6 MM (30%)
Age 64

Affluence & Employment

HHI: \$89k
Full-Time (i: 121)
\$150k+ (i: 130)

HHI: \$91k
Full-Time (i: 126)
\$200k+ (i: 124)

HHI: \$75k
Part-Time (i: 111)
Unemployed (i: 166)

HHI: \$89k
Full-Time (i: 110)
Unemployed (i: 123)

HHI: \$81k
Retired (i: 174)

Life Stage & Family Structure

Single,
Starting to have
children


Married,
with young
children

Single,
Living alone

Separated,
with older
children

Married,
Empty nesters

Category Propensities

WINNERS 



Personal Appearance
categories, Food
Delivery

WINNERS 



Children's products,
Travel, Financial
Services




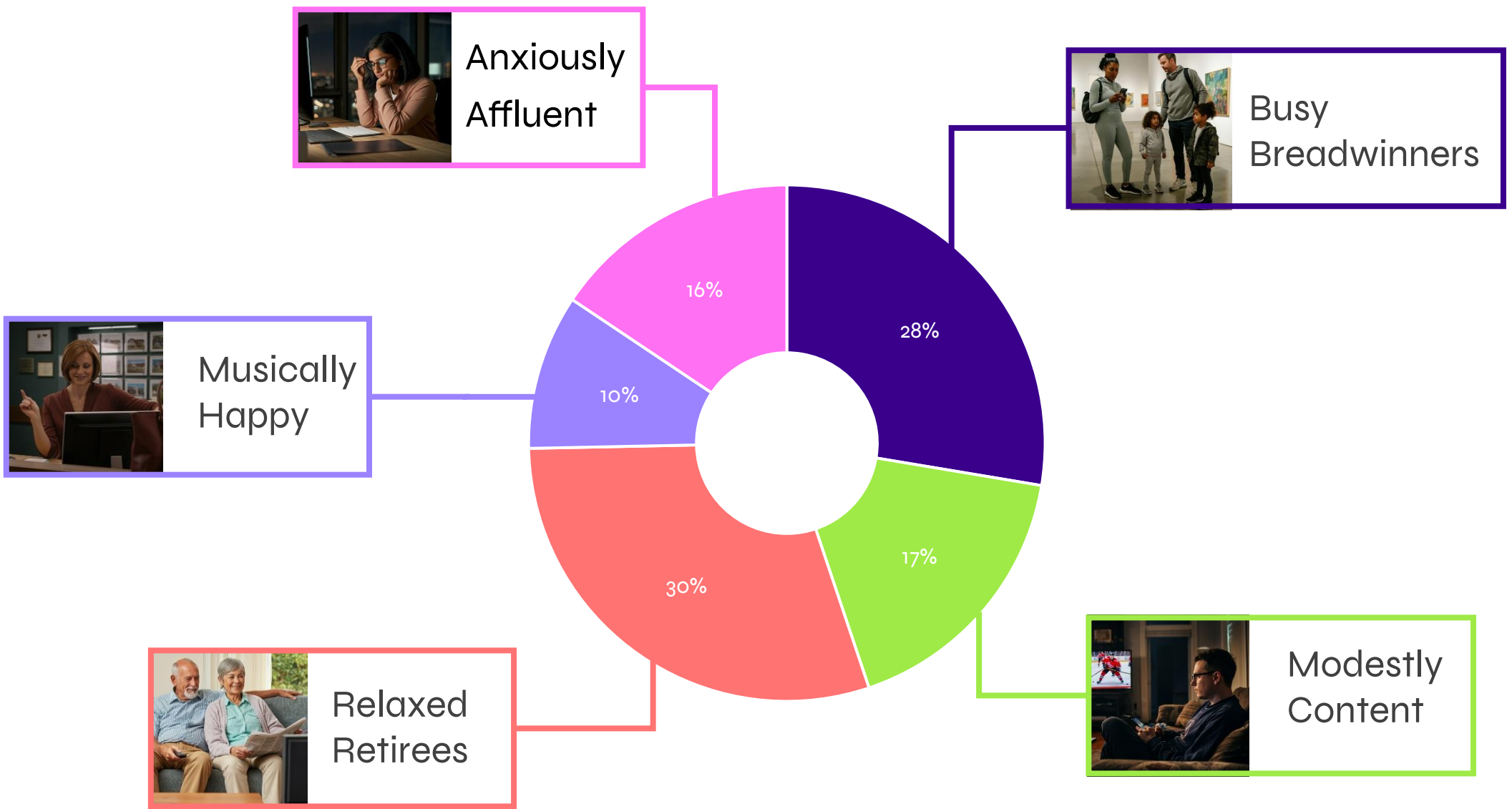
Financial Services,
Alcohol, Pet food




Cosmetic, Gardening
supplies,
books



Will/Estate planning,
Lottery



Anxiously
Affluent




Busy
Breadwinners




Musically
Happy




Relaxed
Retirees



Modestly
Content




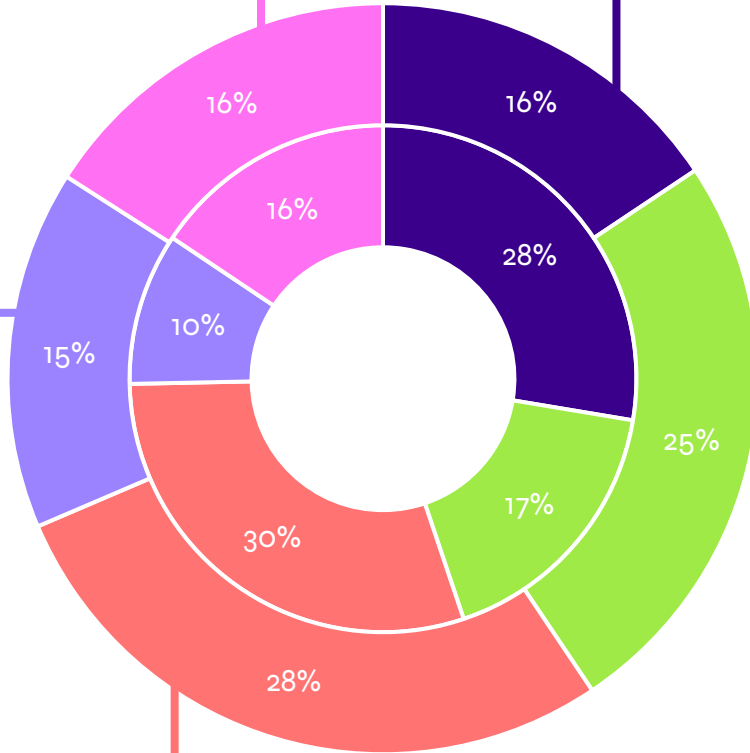
Anxiously
Affluent



Busy
Breadwinners



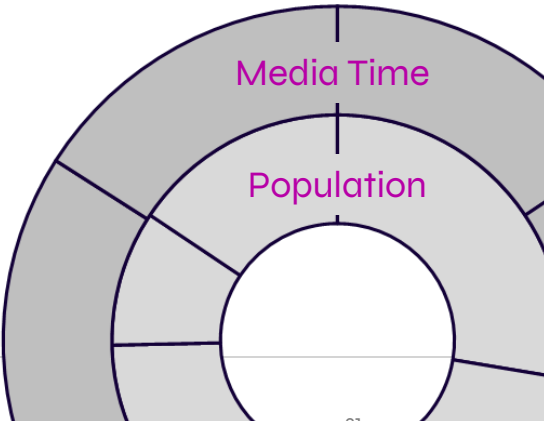
Musically
Happy



Modestly
Content



Relaxed
Retirees

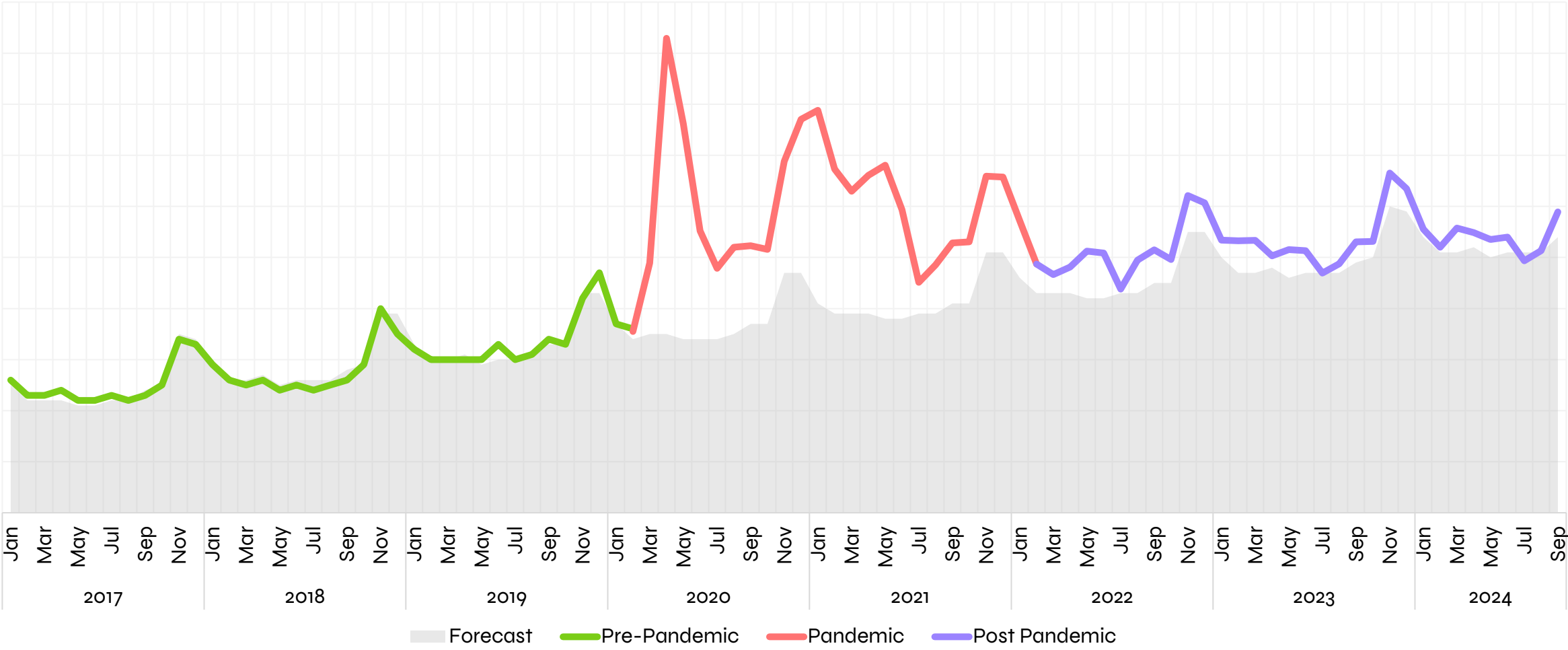


Retail Media



Ecommerce Usage is Back on Long Term Growth Trends

Share of Retail Sales Occurring Online (Statistics Canada Data)



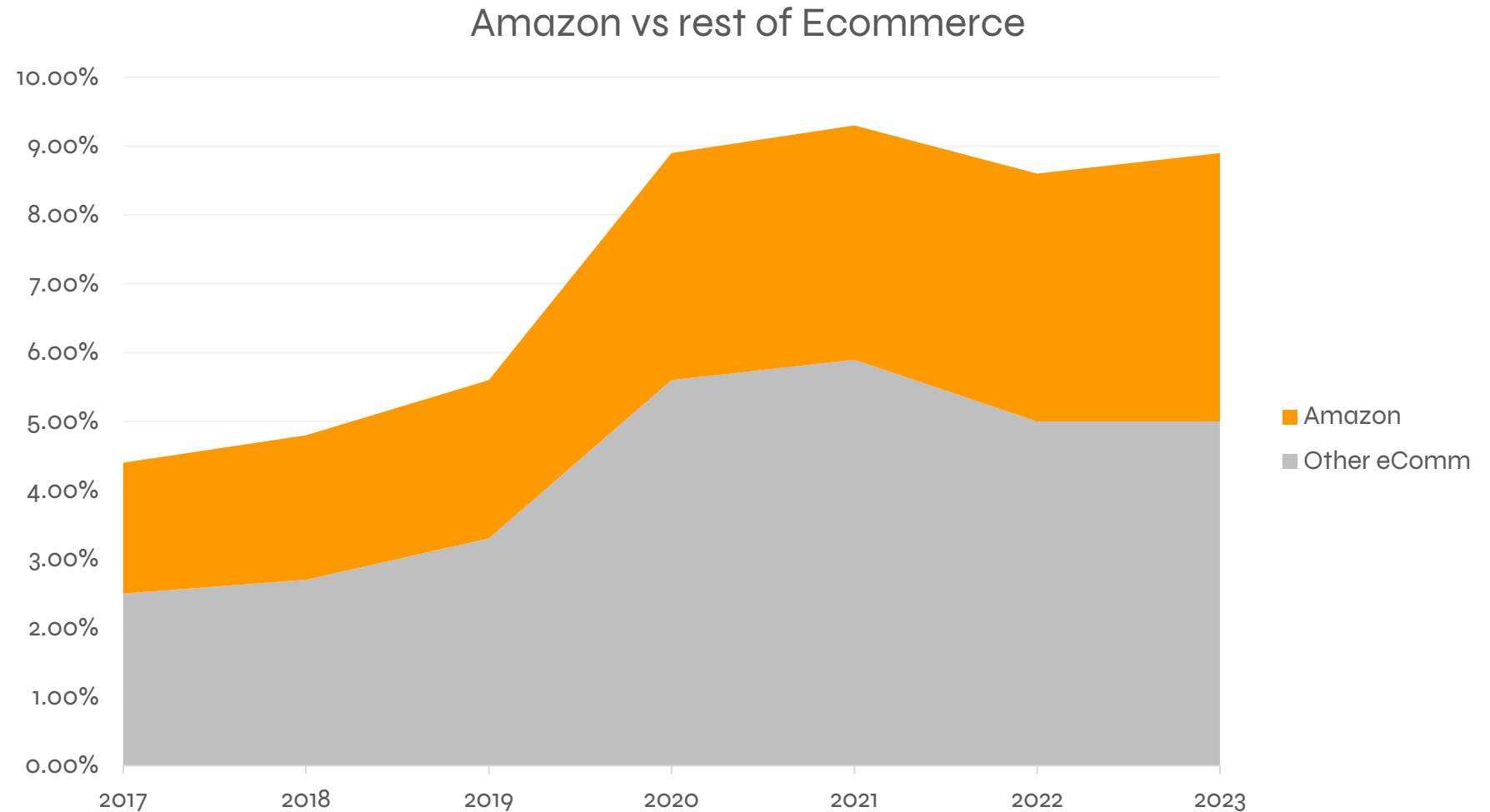
Amazon eCommerce strength unparalleled in physical retail

43%

Amazon's share of
eCommerce Retail

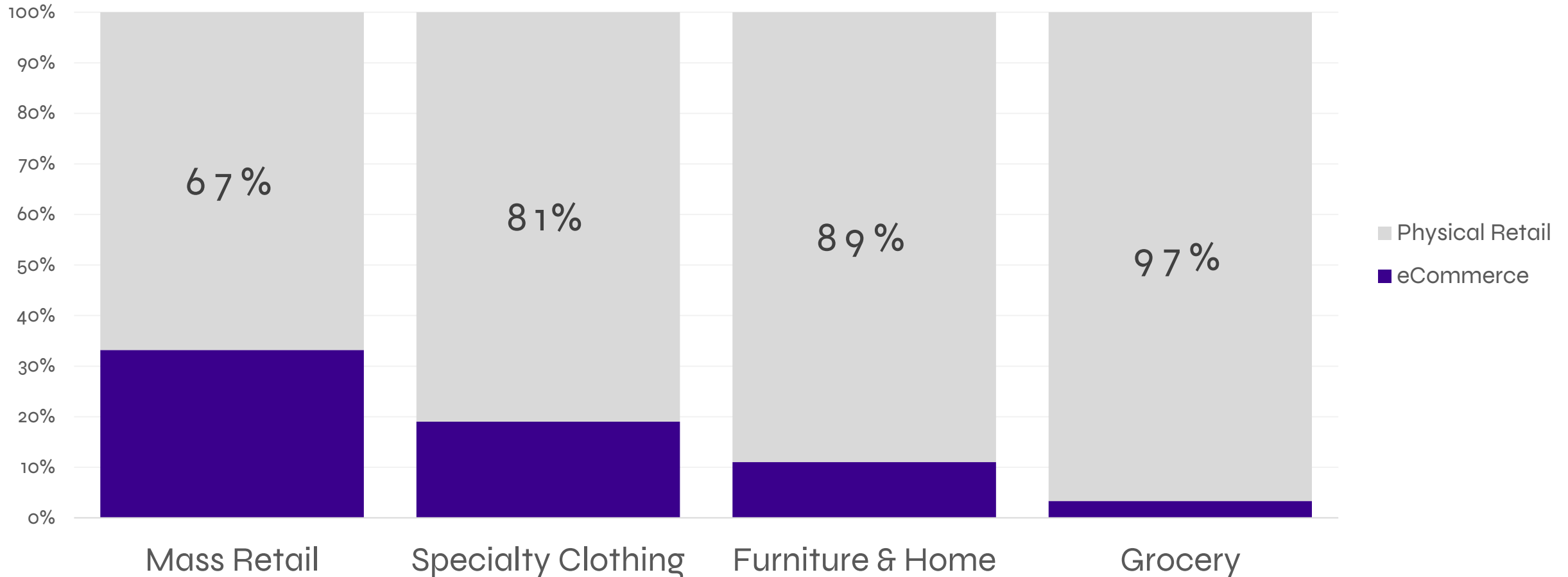
28

Top Retail brands
combine for the
equivalent share in
physical retail

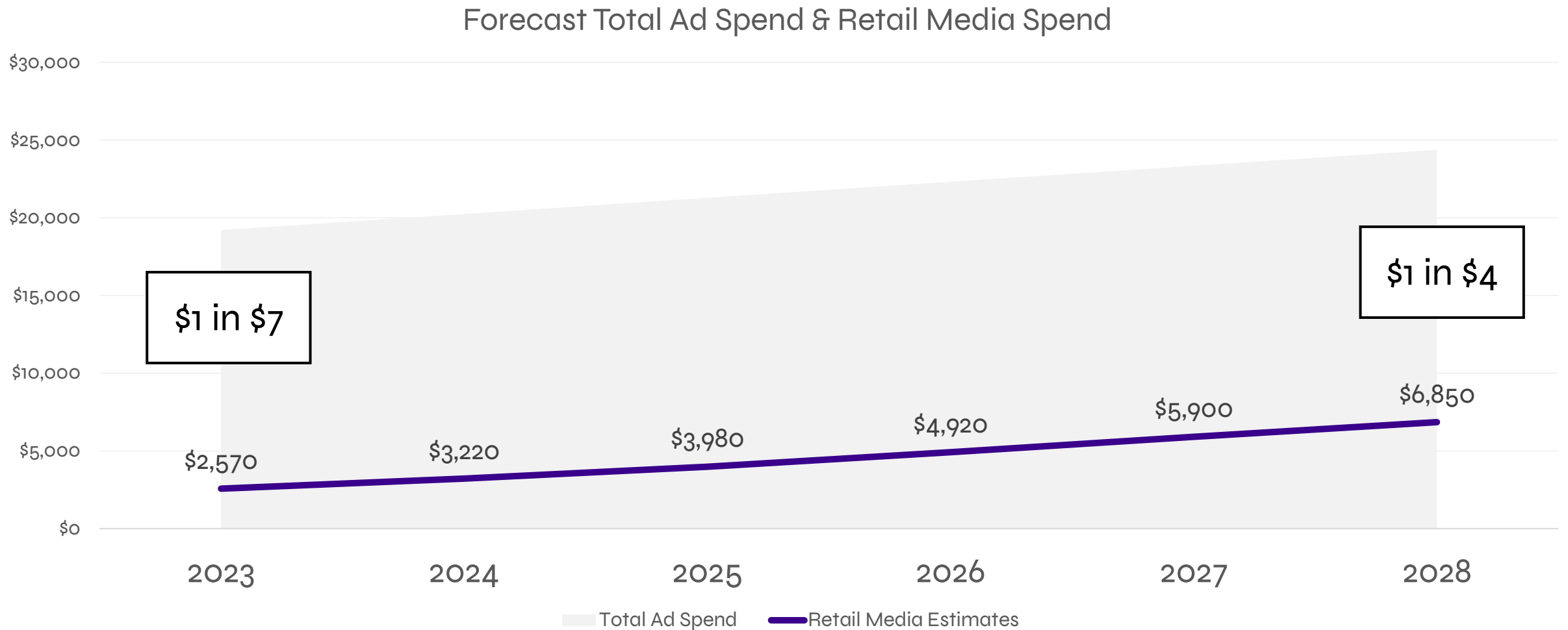


eCommerce Penetration Varies by Category

Share of Spend – eCommerce vs Physical Retail by Category



Retail Media is Forecast to be 25% of Paid Media by 2028

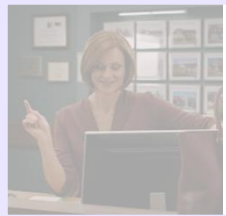




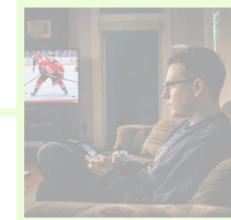
Anxiously
Affluent



Busy
Breadwinners



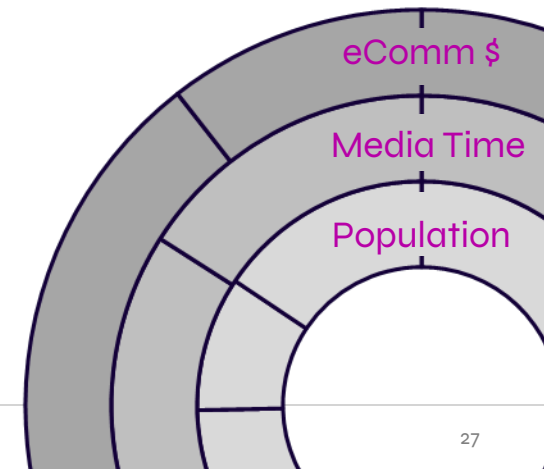
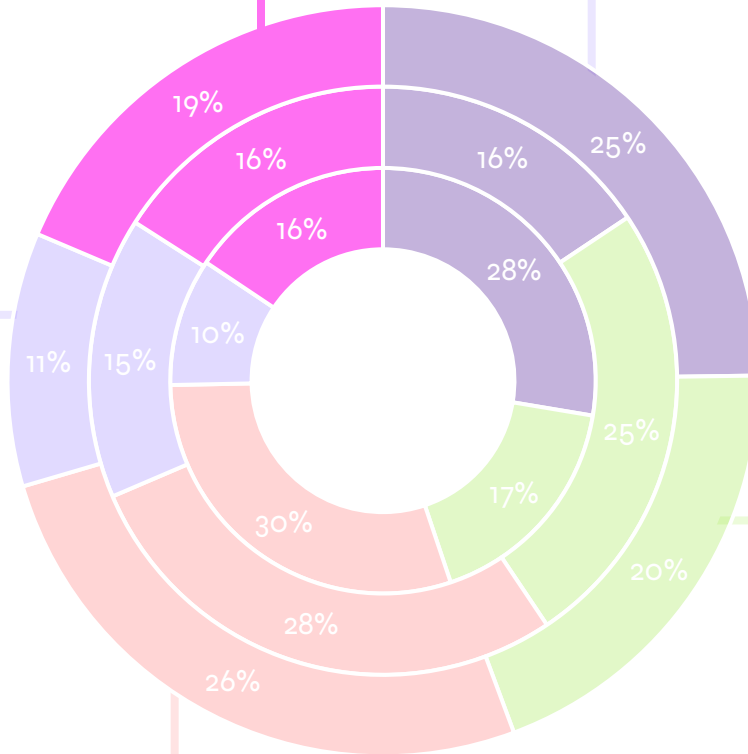
Musically
Happy



Modestly
Content



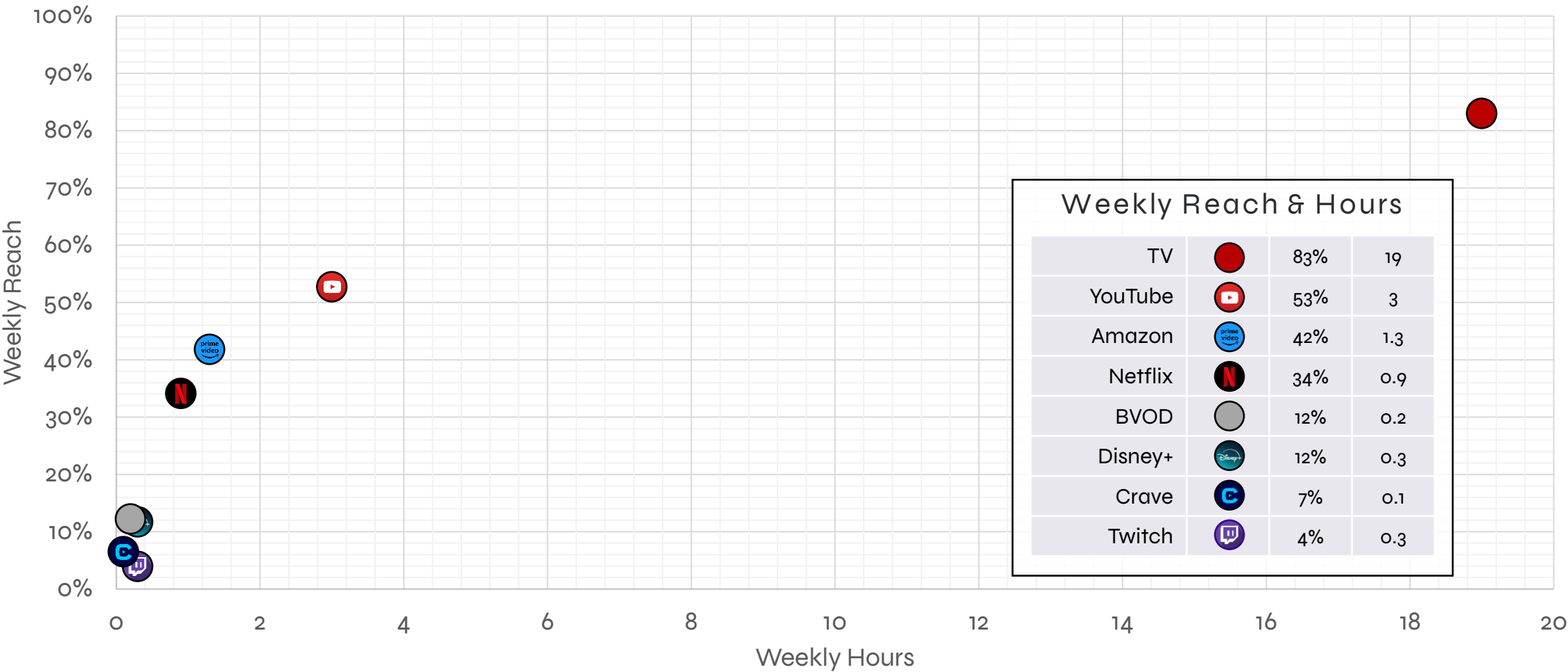
Relaxed
Retirees



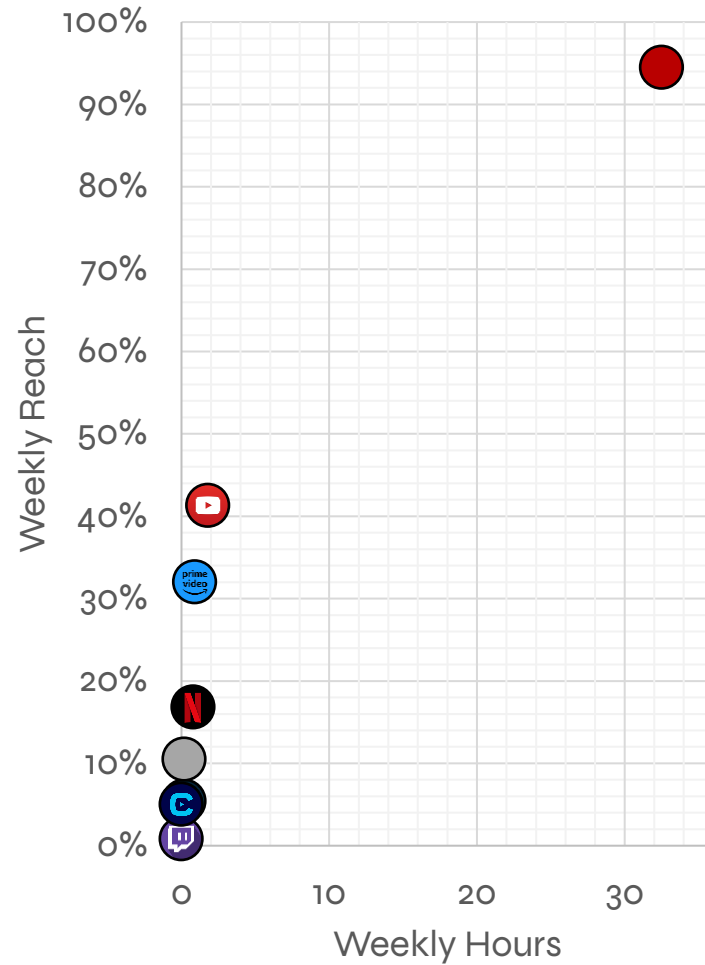
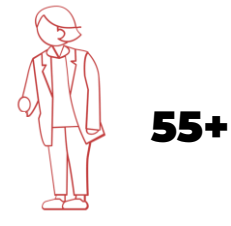
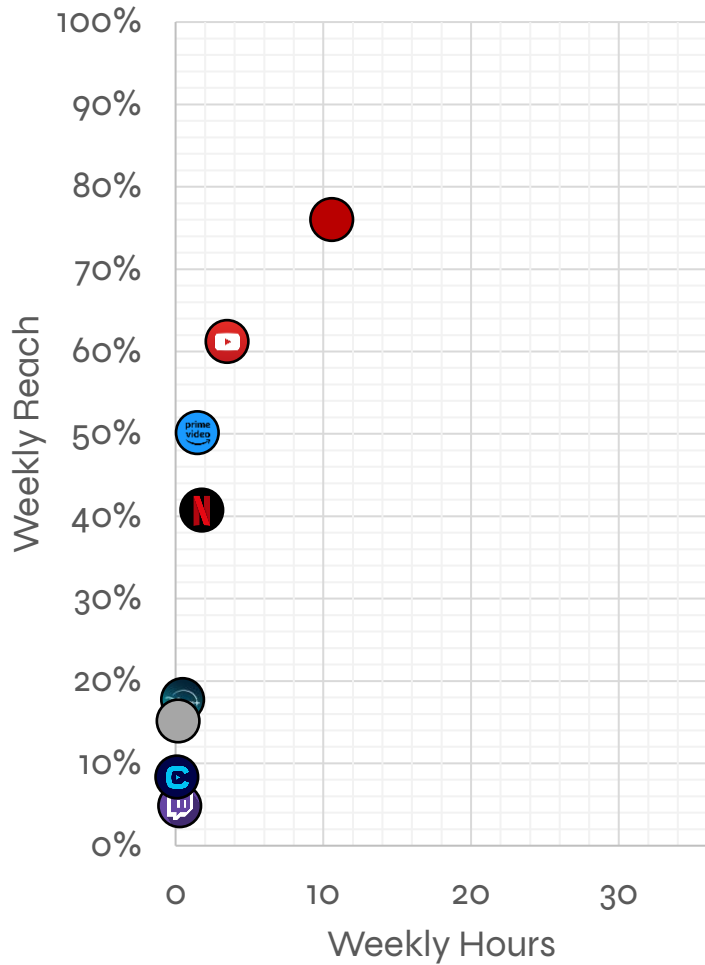
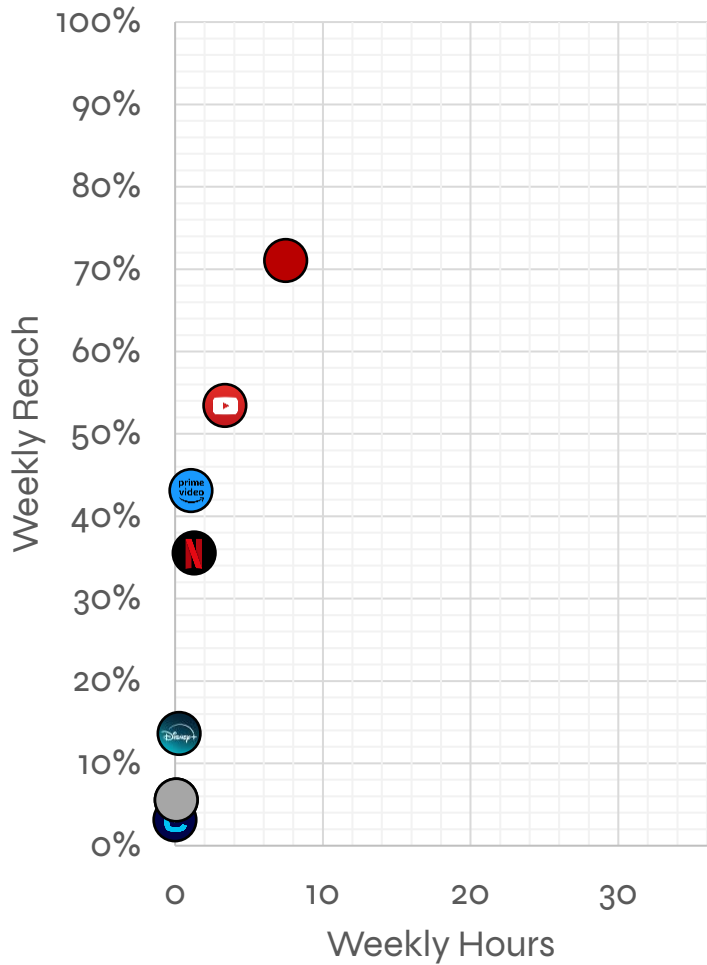
Video



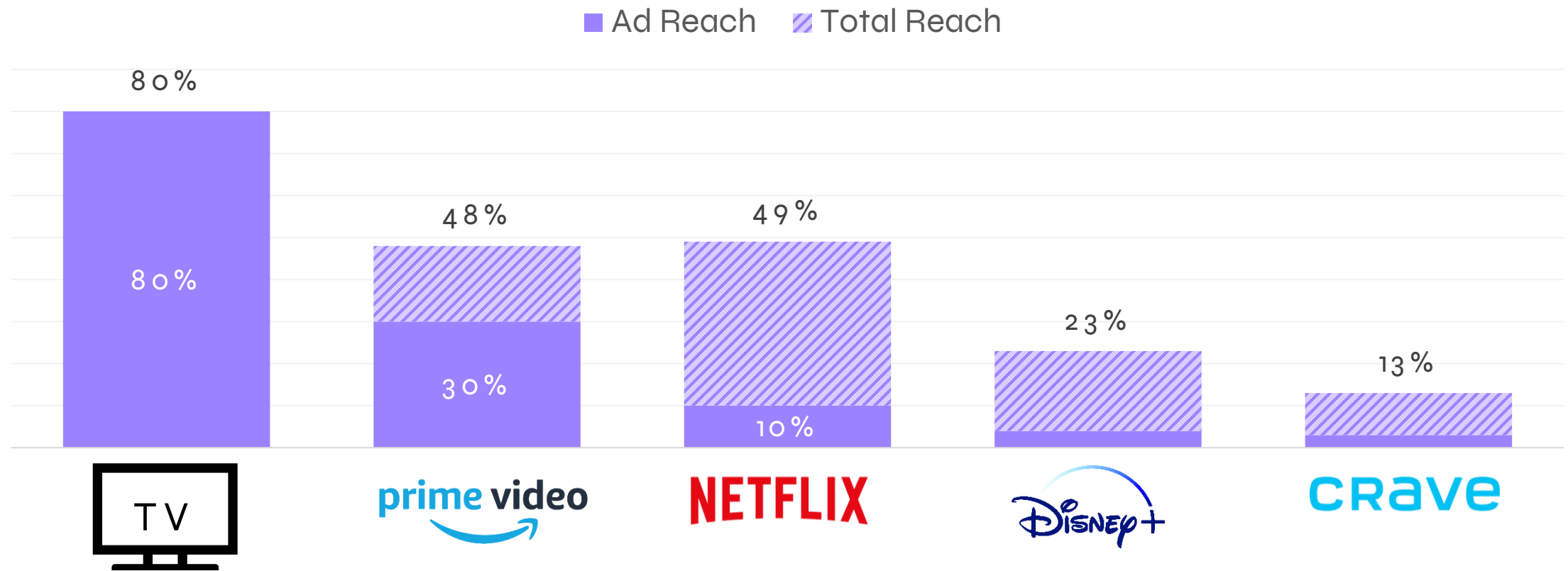
Linear Television Continues to Dominate Reach & Time Amongst 'Total Adults'



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



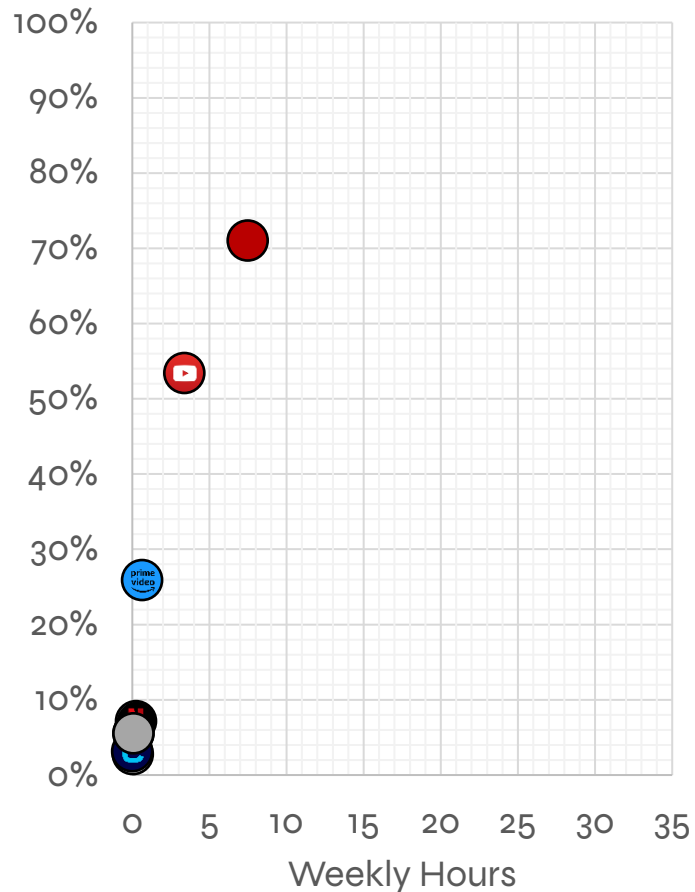
Platform reach is not necessarily ad reach.



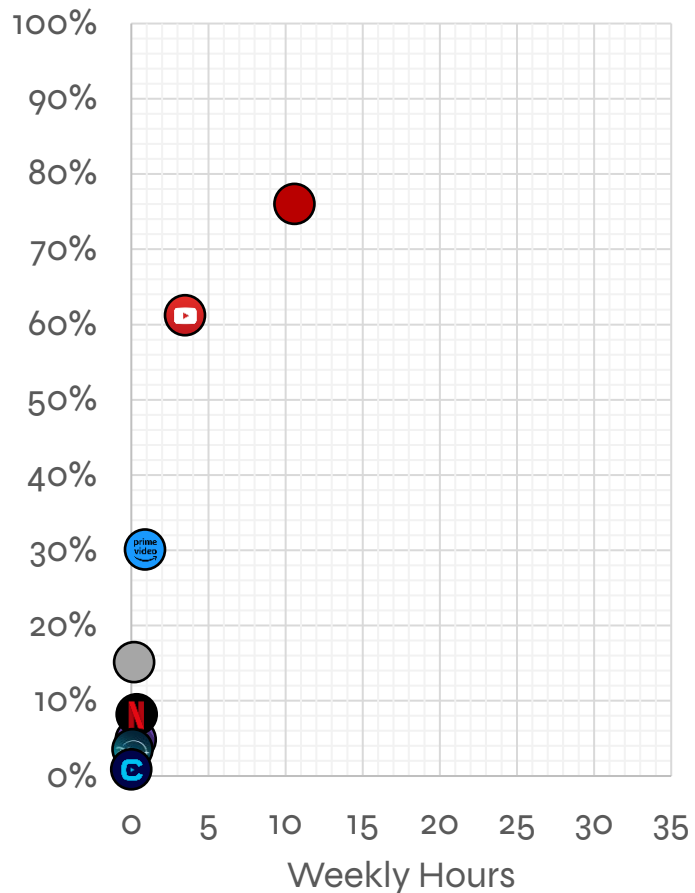
Source : PHD Database, A18+, AvMtllyReach(%), Canada, Jan-July 2024
(AVERAGE : VAM-Numeris (Reach), MTM (Reach + Reach with Ads) & Vividata Metrica (Reach with Ads))



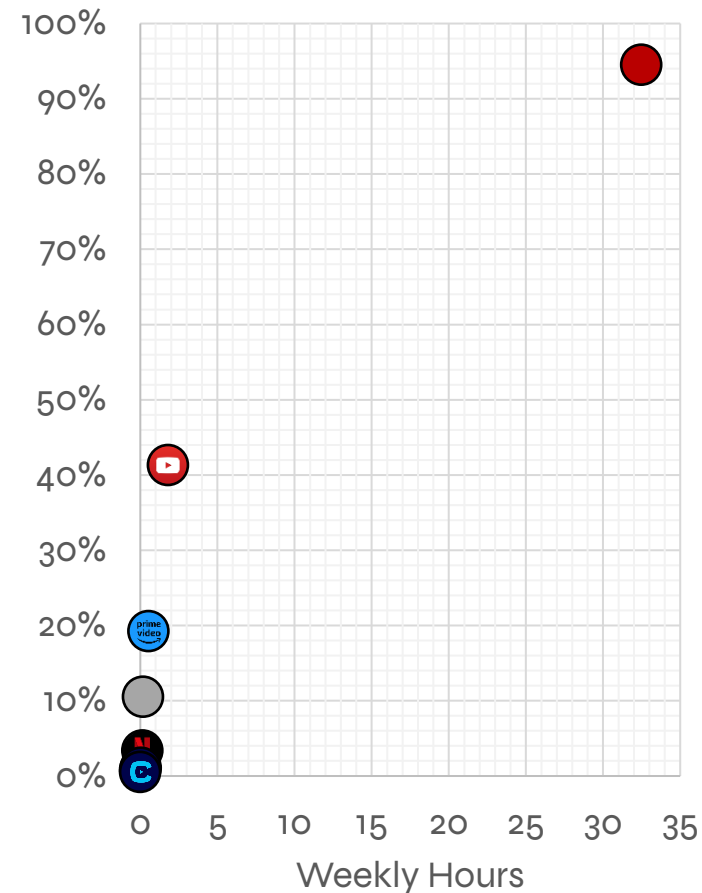
Under 30






30-54



55+



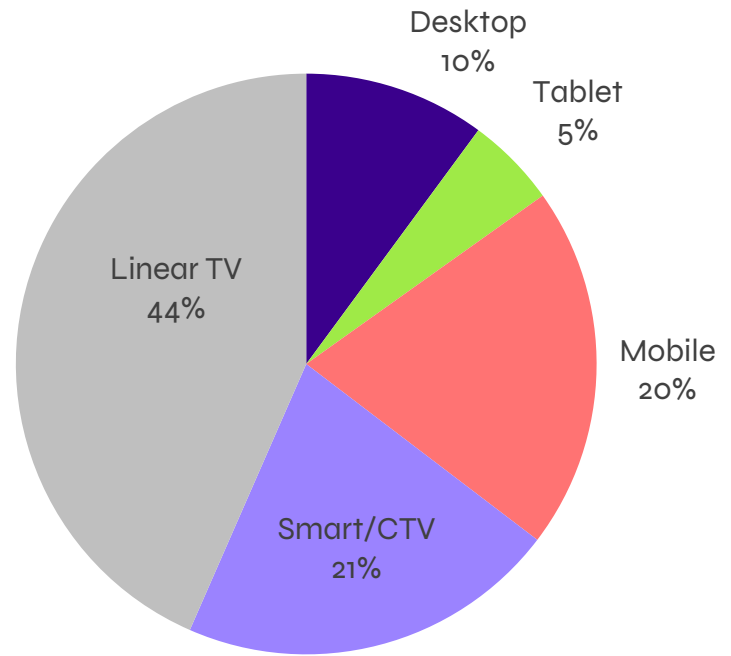
Significant Overlap in Subscription Types – especially between TV and Streamers

		Also consume ...				
			NETFLIX	prime video		CRaVE
People who consume ...			44%	41%	22%	13%
	NETFLIX	81%		63%	38%	18%
	prime video	80%	69%		38%	20%
		80%	76%	70%		23%
	CRaVE	86%	67%	65%	42%	

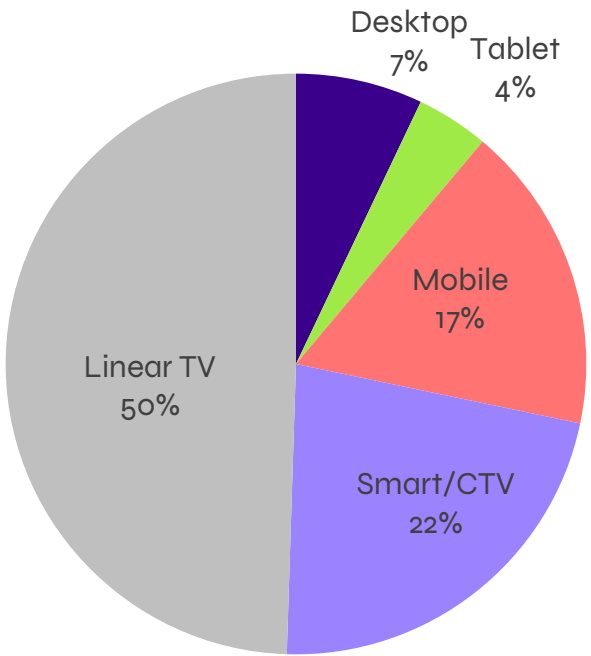
Time Spent by Device Shows High Potential for Addressability



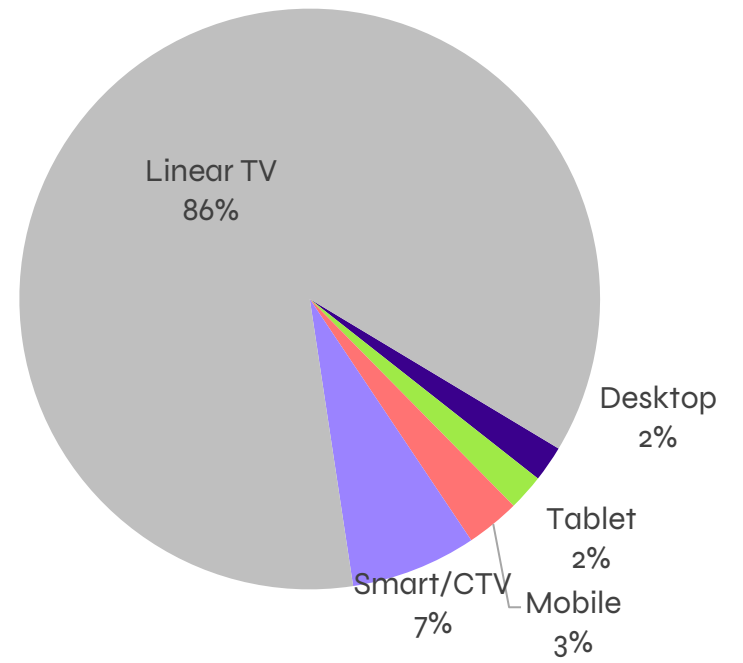
Under 30

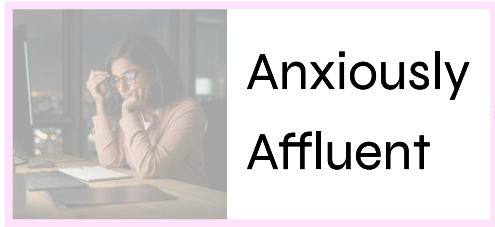


30-54



55+

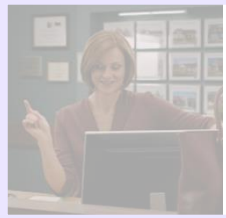




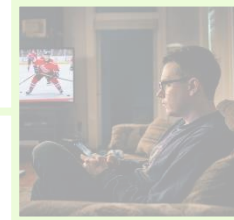
Anxiously
Affluent



Busy
Breadwinners



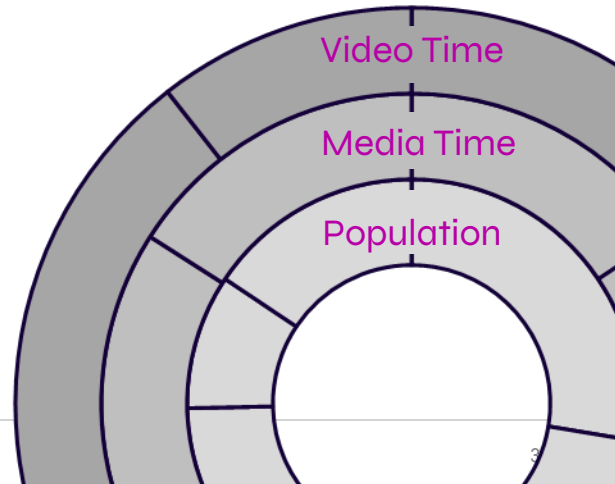
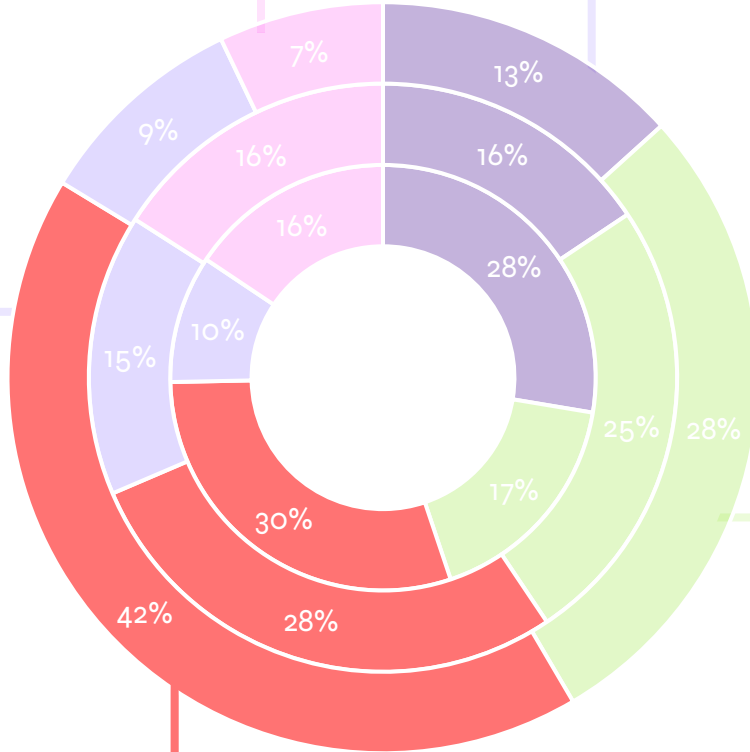
Musically
Happy



Modestly
Content



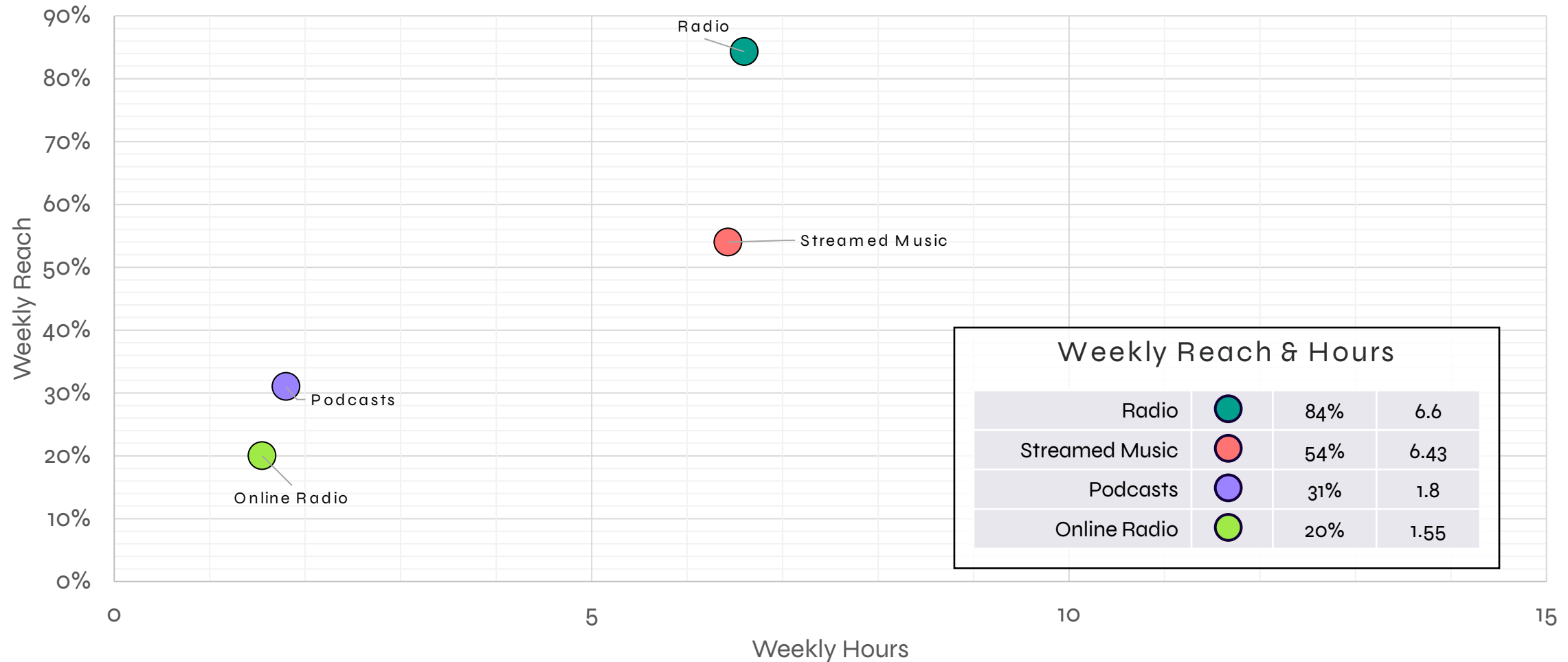
Relaxed
Retirees





Audio

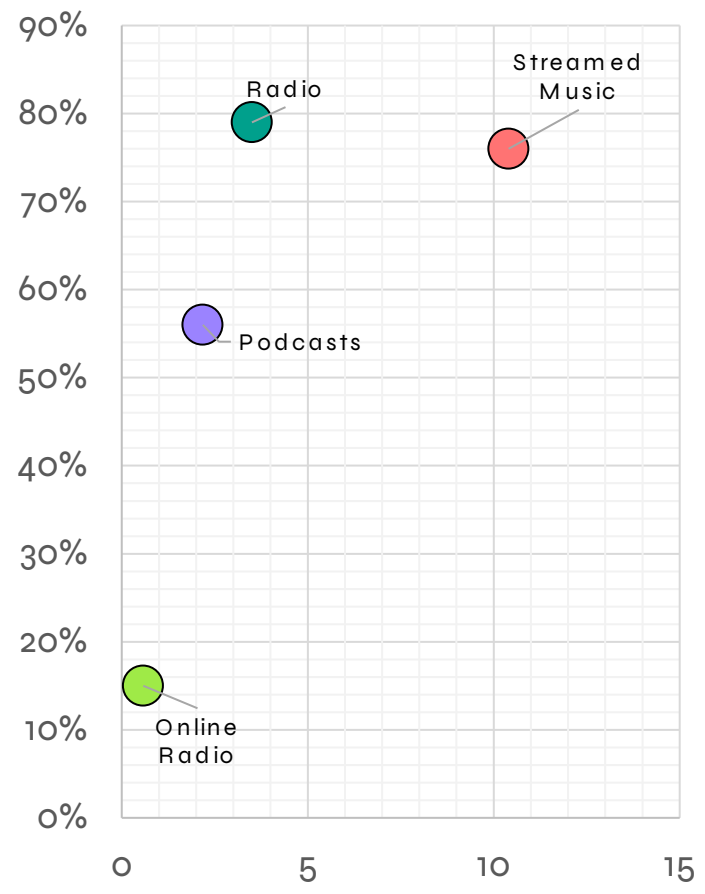
Radio continues to be #1 overall



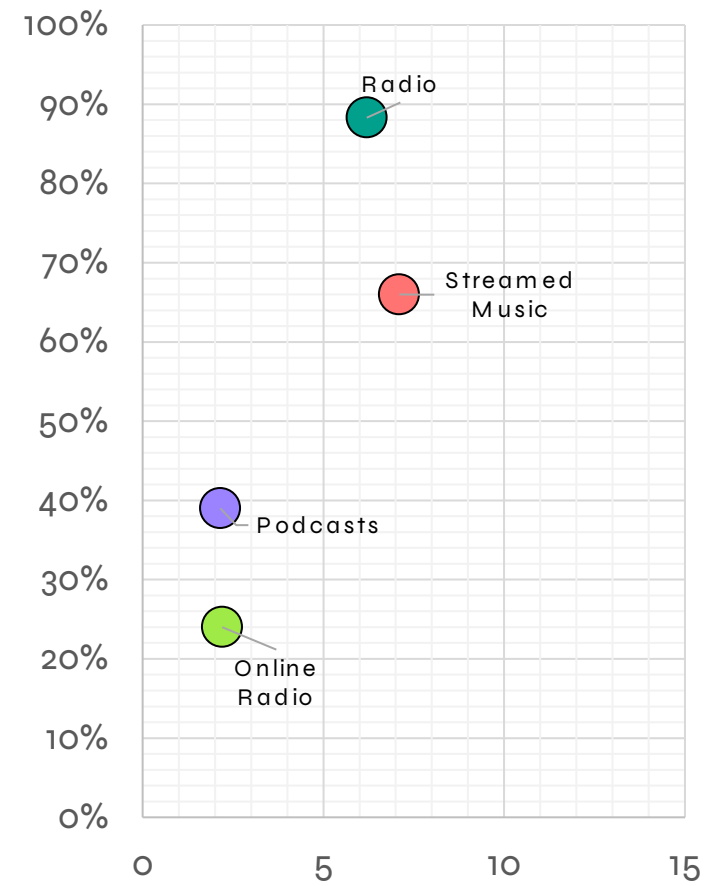
Source: Numeris PPM Radio, MTM Spring 2023, PHD estimates from multiple industry sources,



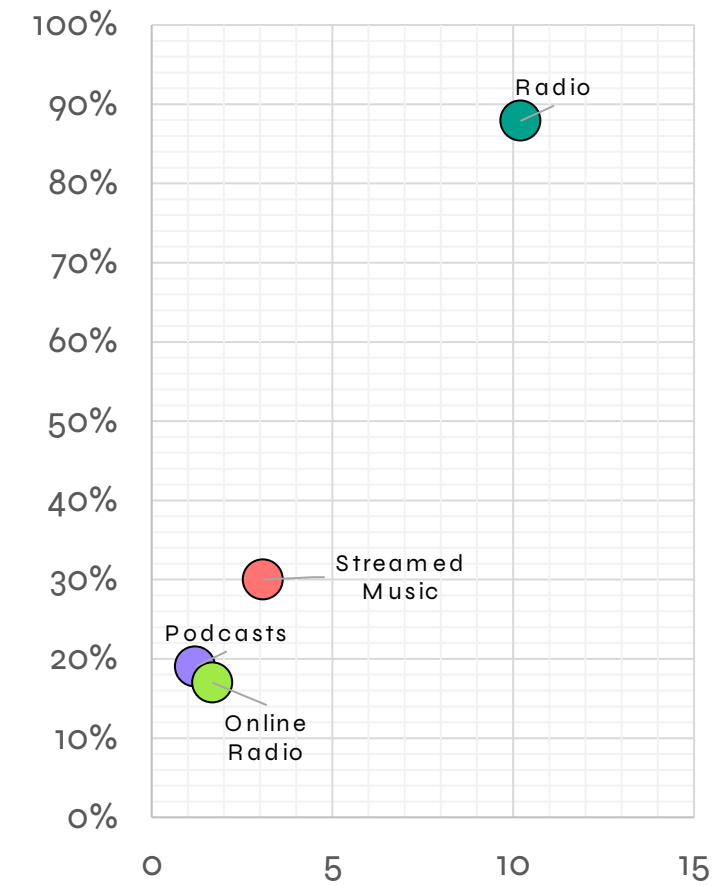
Under 30

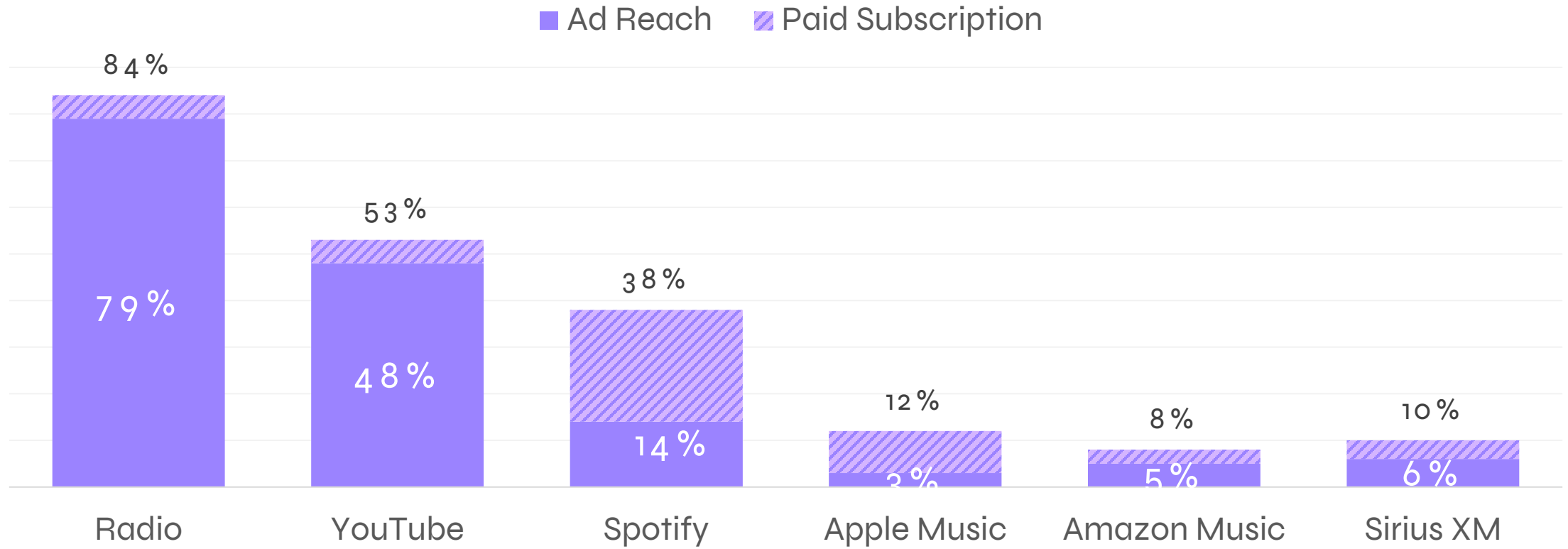


30-54



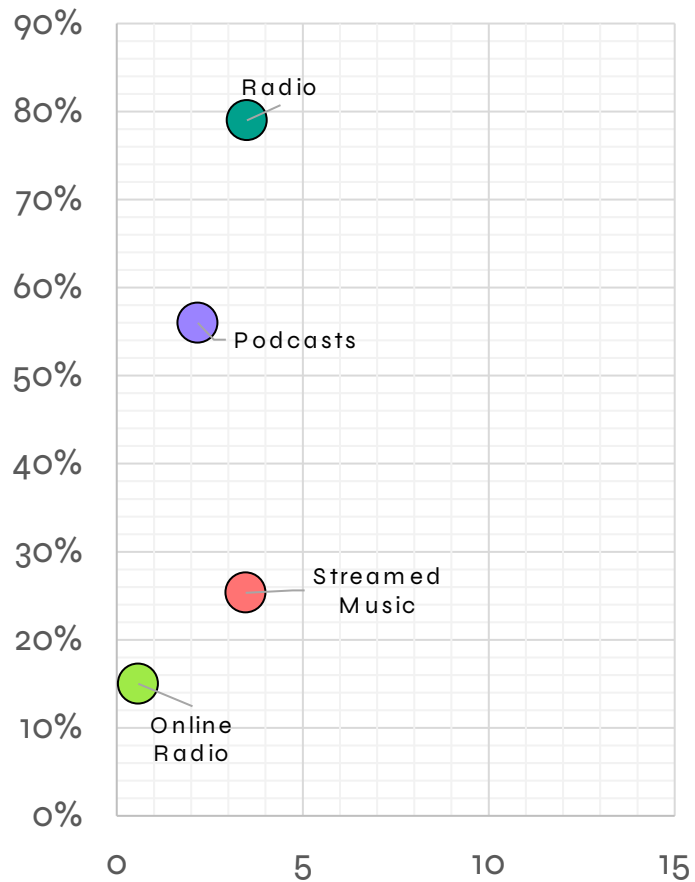
55+



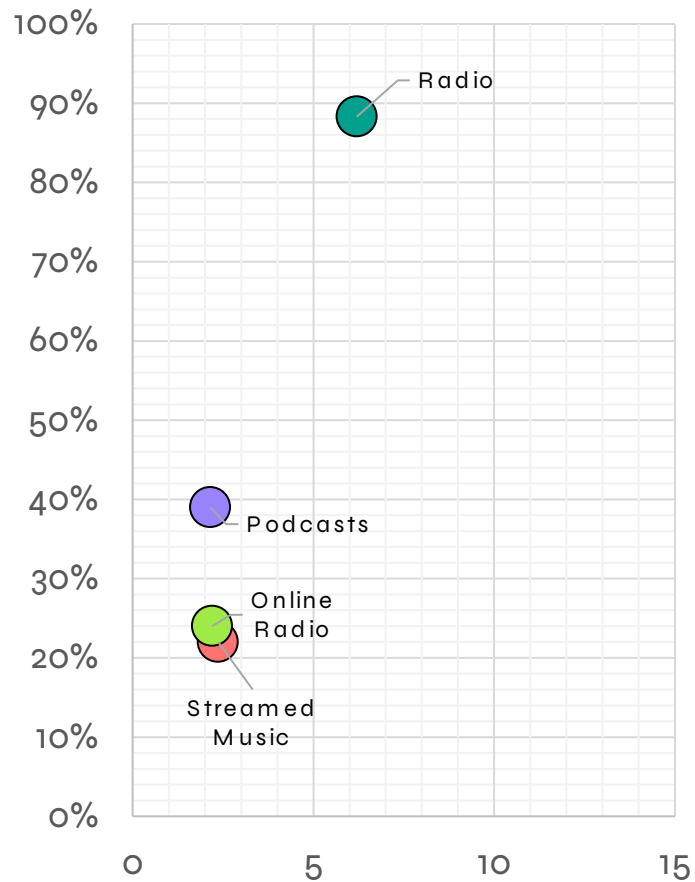




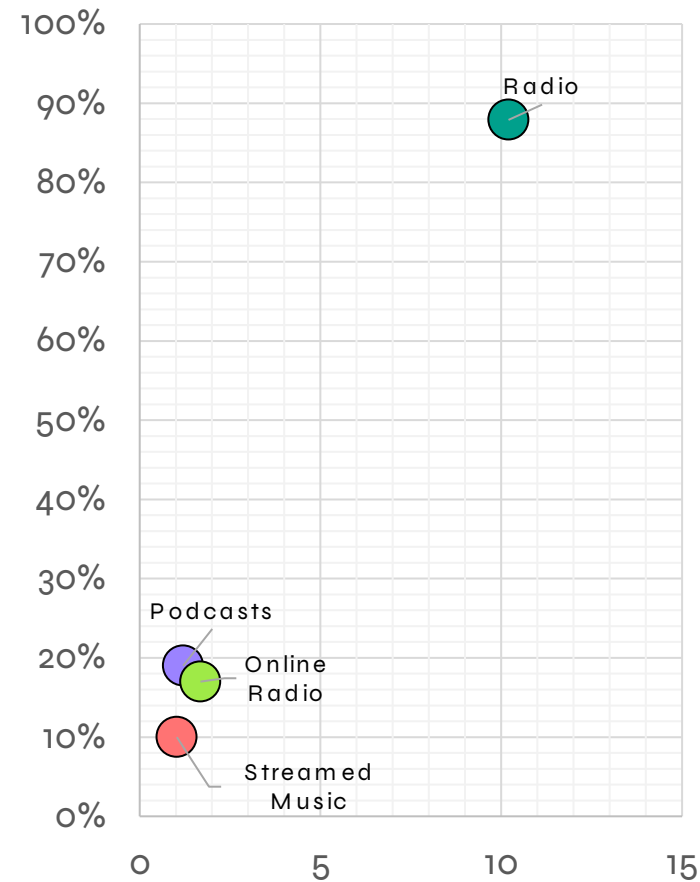
**Under
30**

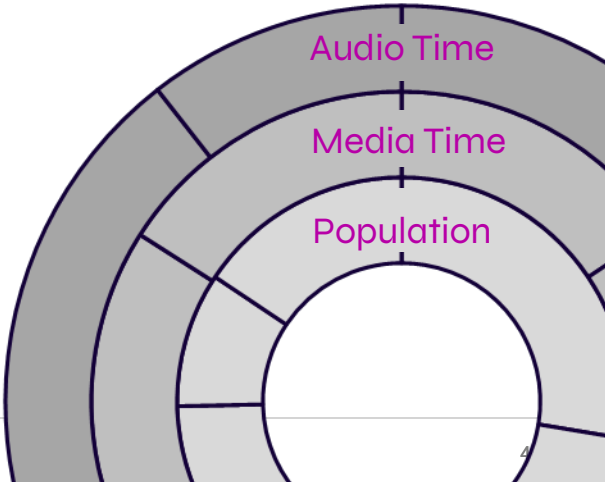
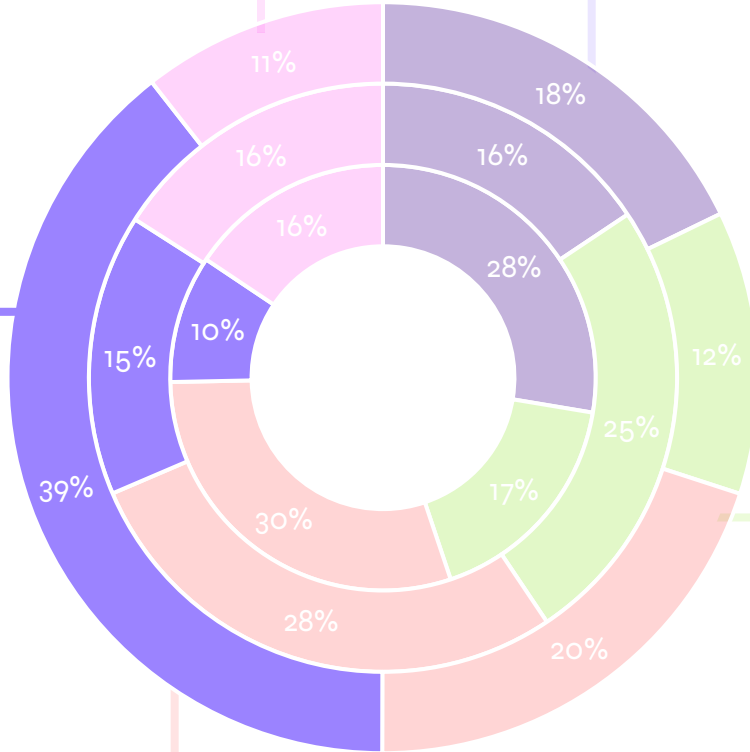
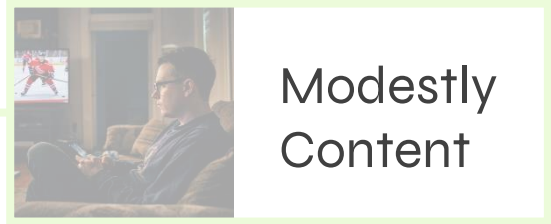
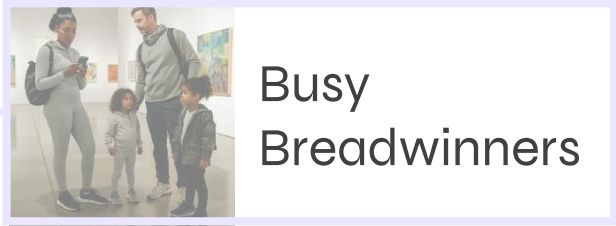
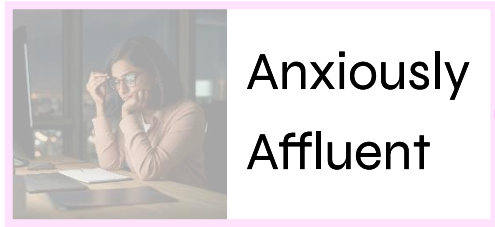


30-54



55+

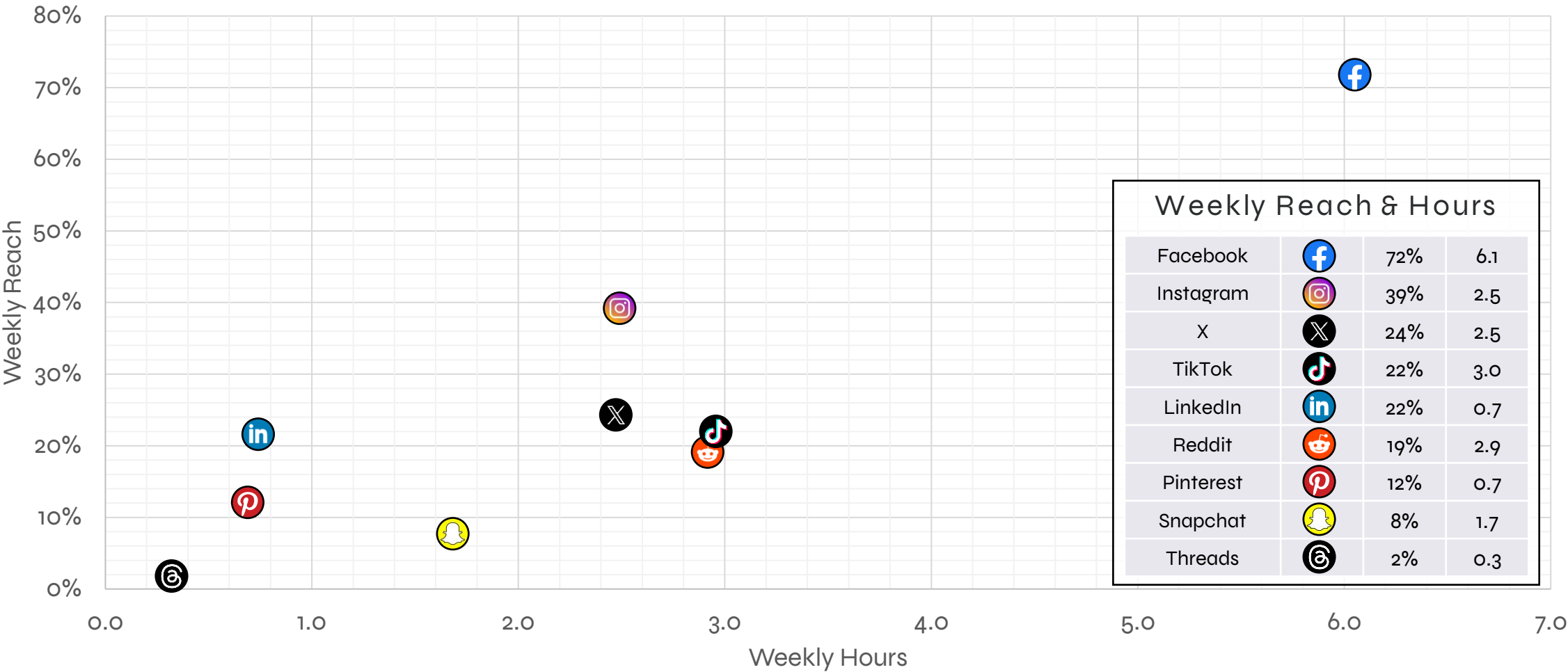




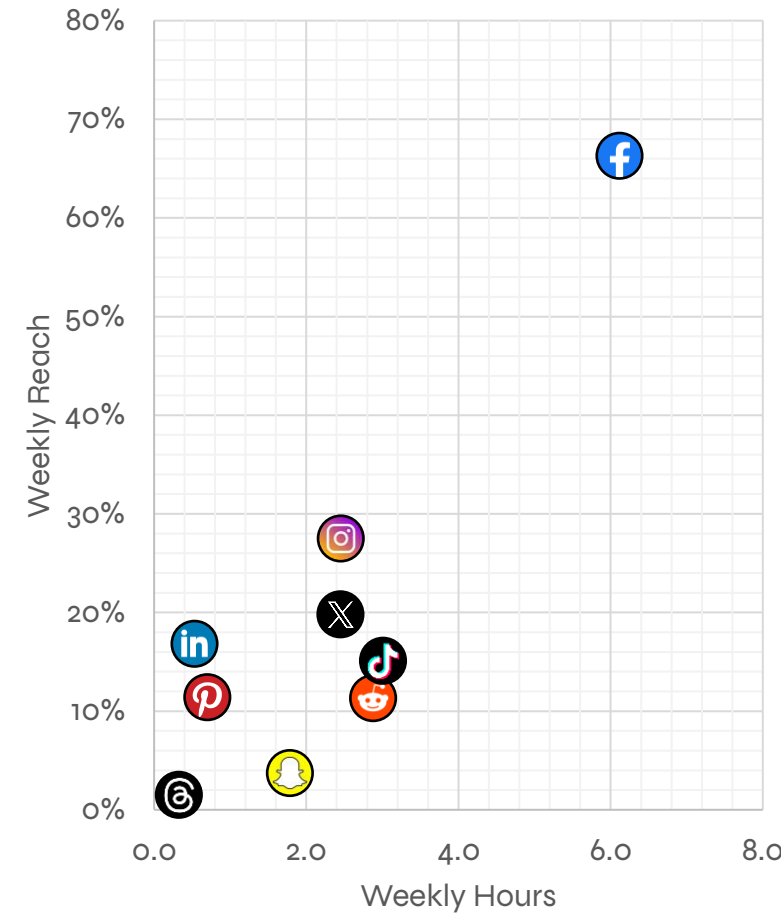
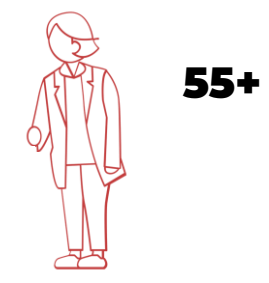
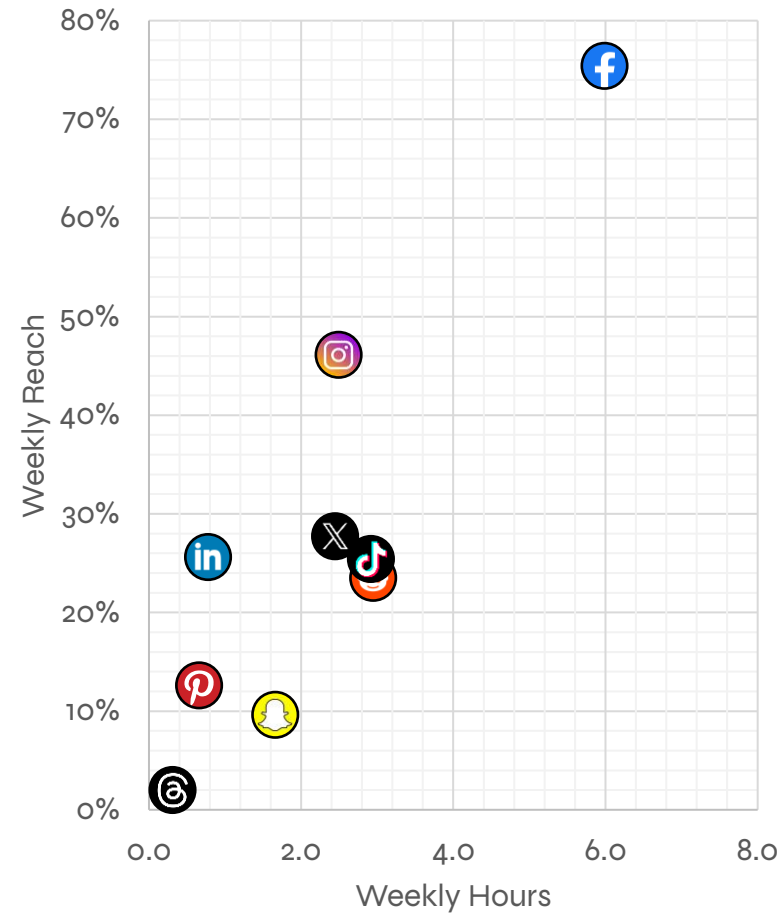
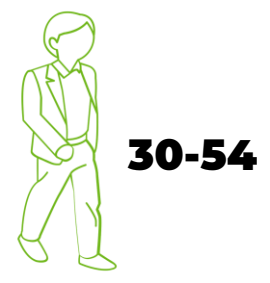
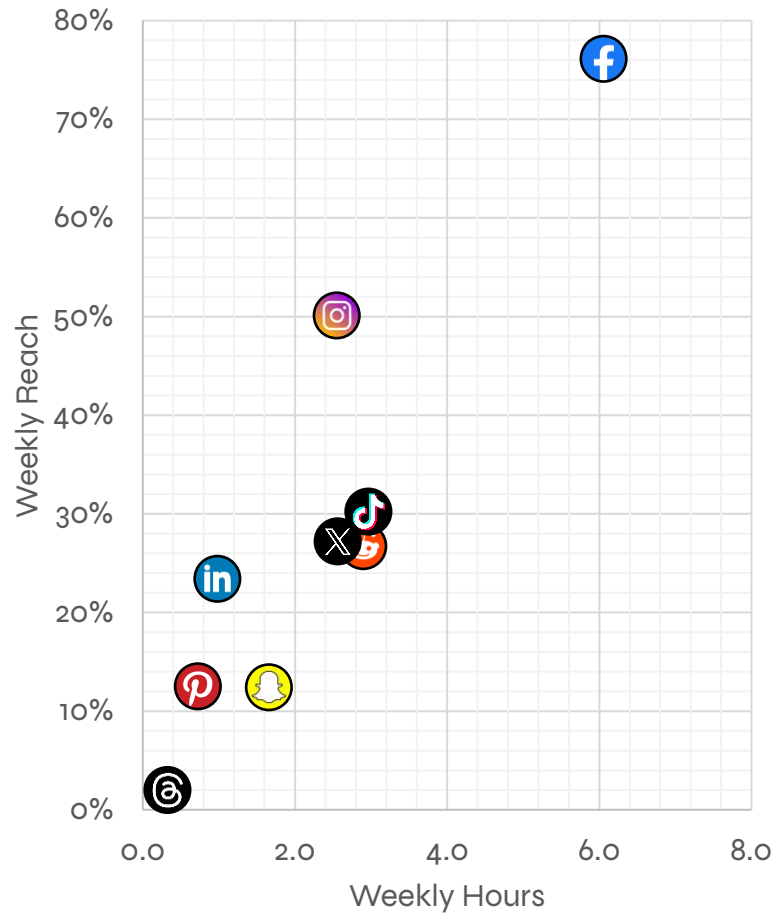
Social Media






















Meta Dominates Social Media Reach & Time




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



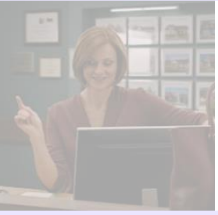
									
		51%	31%	29%	27%	23%	16%	10%	3%
	93%		39%	39%	33%	31%	20%	17%	4%
	91%	63%		34%	39%	37%	17%	12%	4%
	94%	70%	38%		28%	32%	20%	18%	4%
	90%	61%	44%	29%		33%	16%	10%	4%
	87%	63%	47%	37%	38%		18%	12%	4%
	92%	65%	35%	37%	29%	29%		14%	1%
	95%	84%	37%	51%	27%	31%	22%		2%
	99%	91%	58%	50%	43%	47%	8%	8%	




**Anxiously
Affluent**




**Busy
Breadwinners**



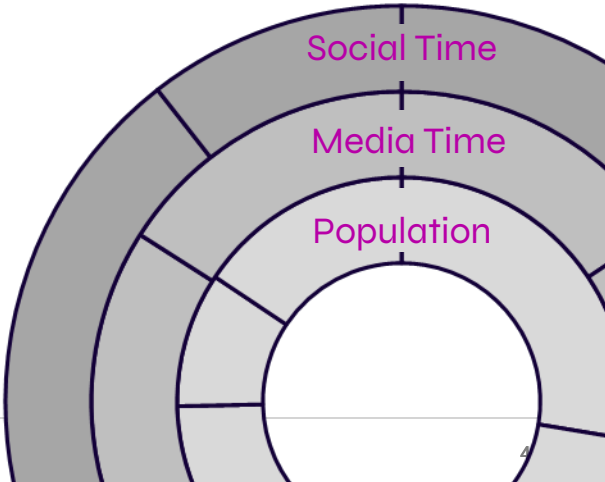
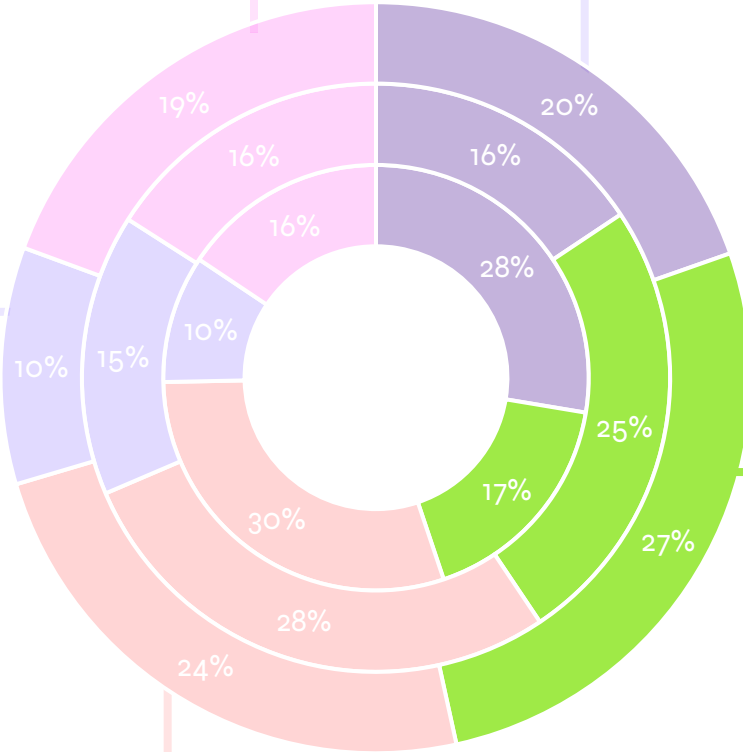
**Musically
Happy**



**Modestly
Content**



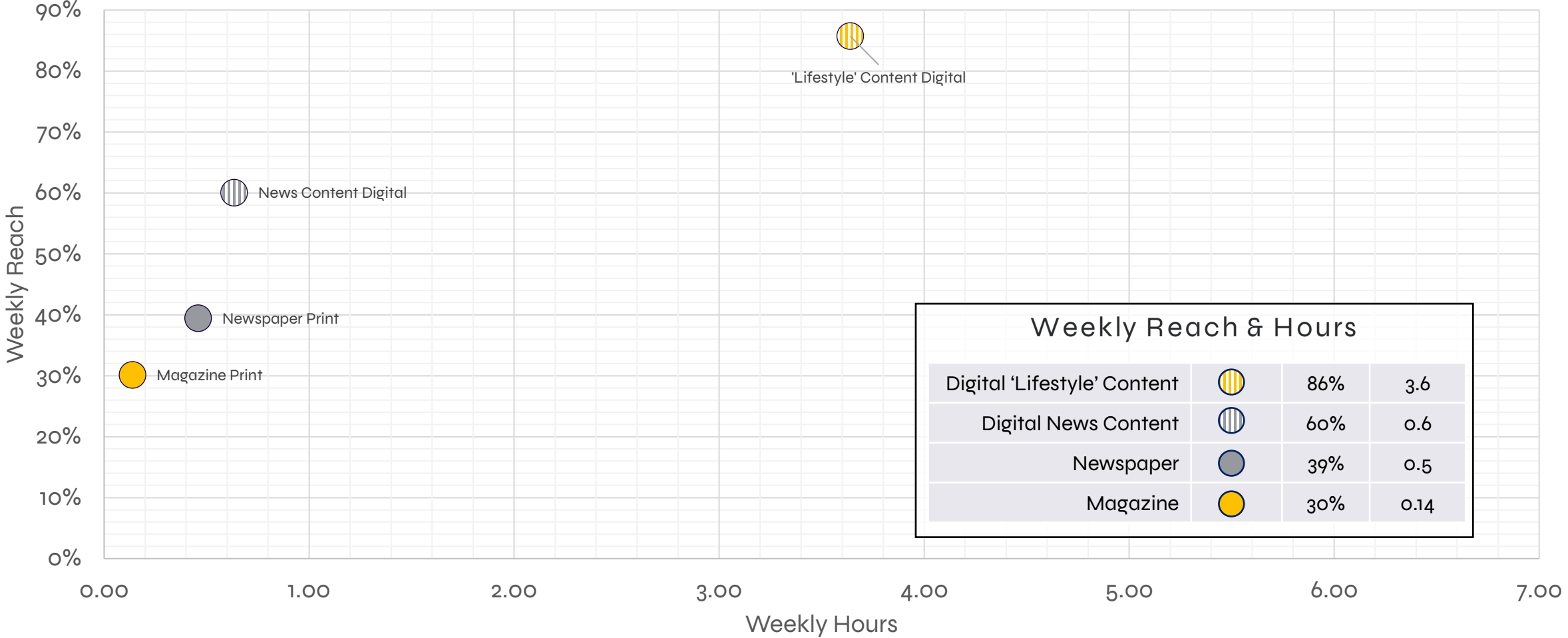
**Relaxed
Retirees**





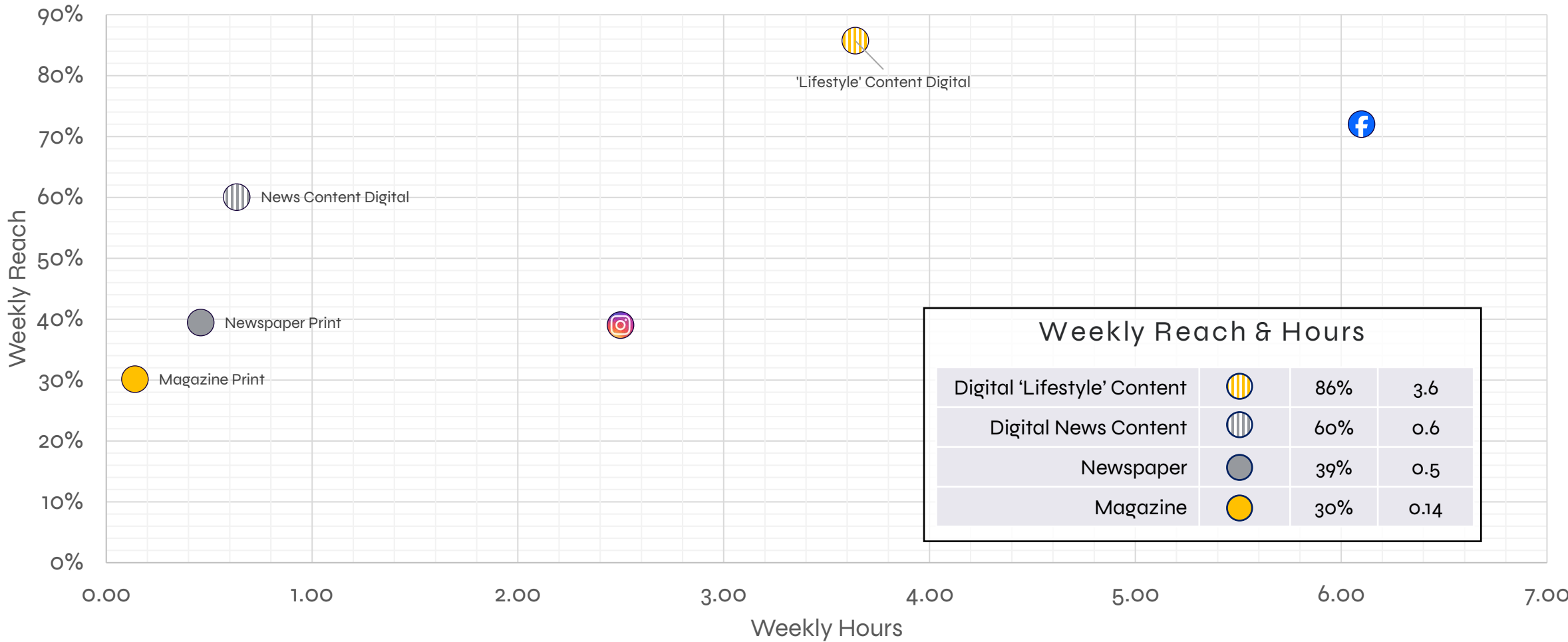
News & Content

Digital News & Content Dramatically Extends Print Reach & Time

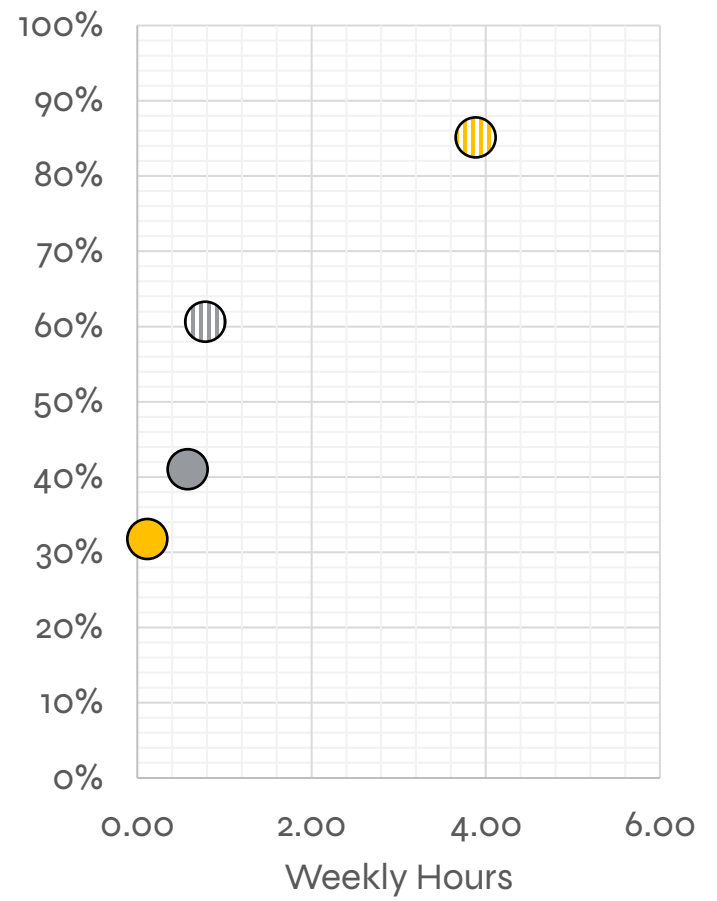
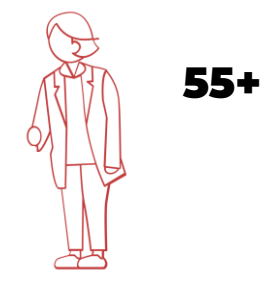
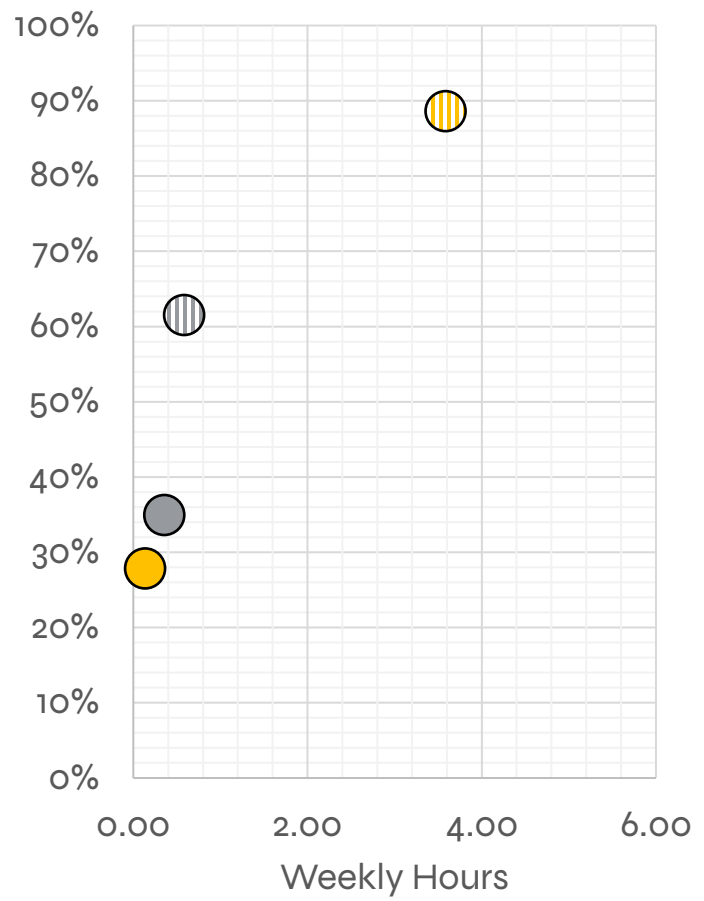
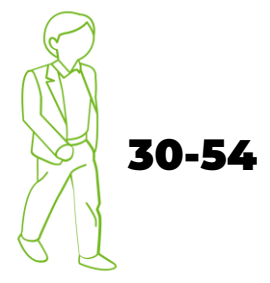
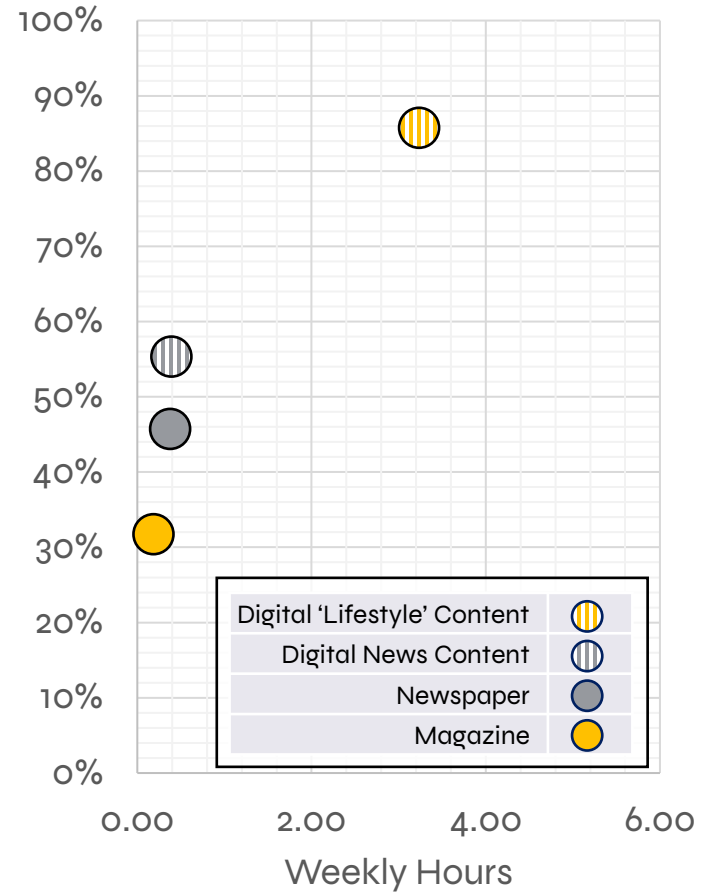


Source: Numeris PPM Radio, MTM Spring 2023, PHD estimates from multiple industry sources,

News & Content have comparable reach but less than time than leading socials

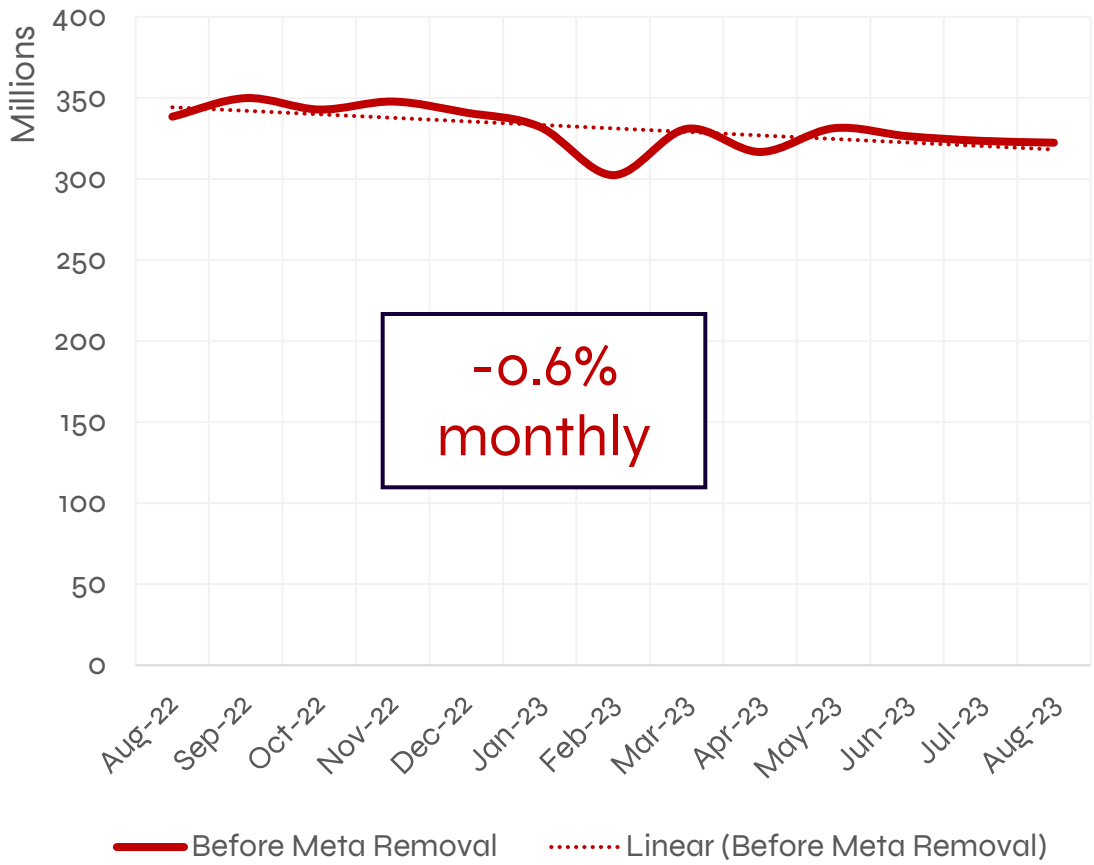


Source: Numeris PPM Radio, MTM Spring 2023, PHD estimates from multiple industry sources,

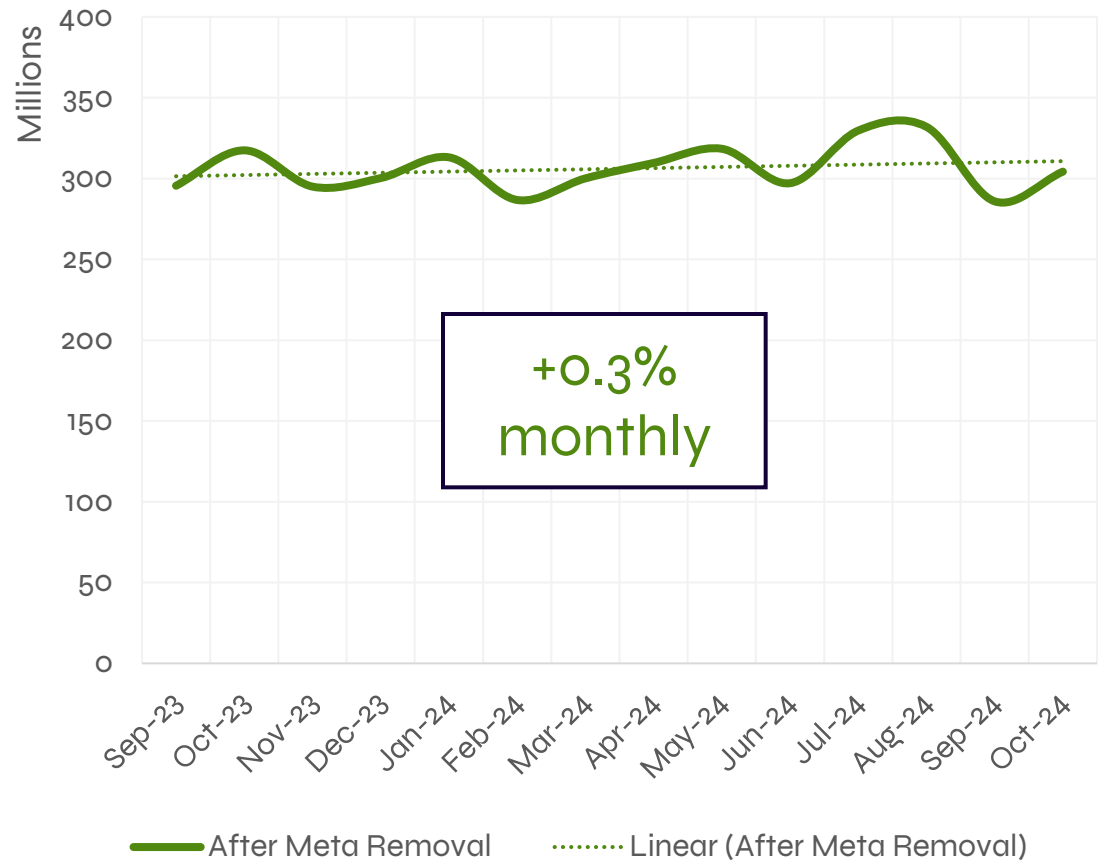


News Consumption Appears to have Stabilized Post Meta Removal

Before Meta Removal:
Monthly Visits of 150 News Sites in Canada

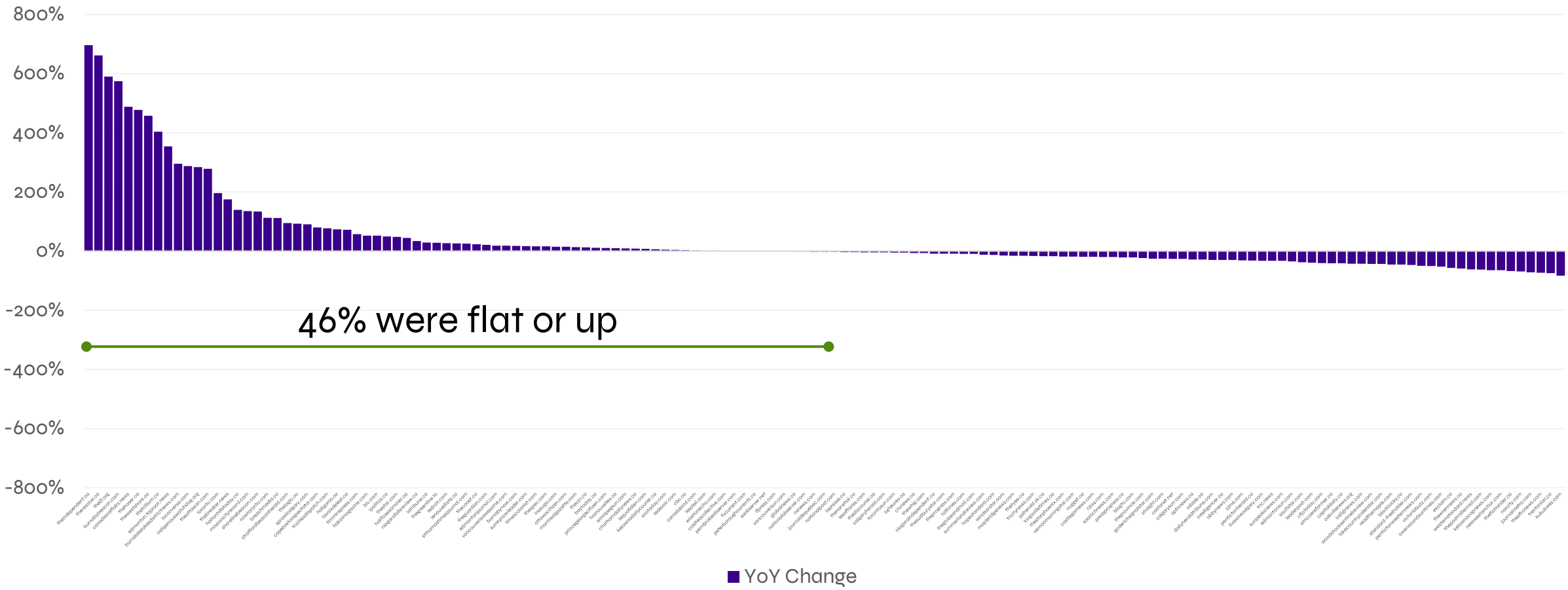



After Meta Removal:
Monthly Visits of 150 News Sites in Canada




Not all News Providers are Performing Equally

August, September, October vs the Same Period Last Year

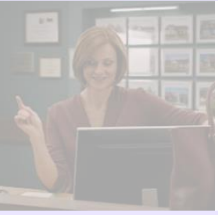




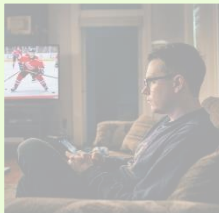
Anxiously
Affluent




Busy
Breadwinners



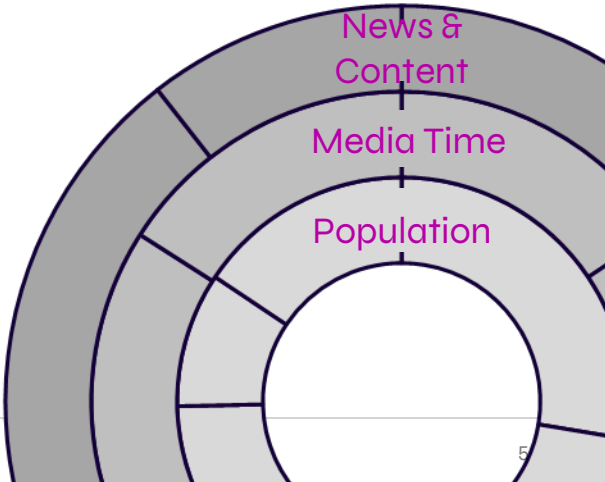
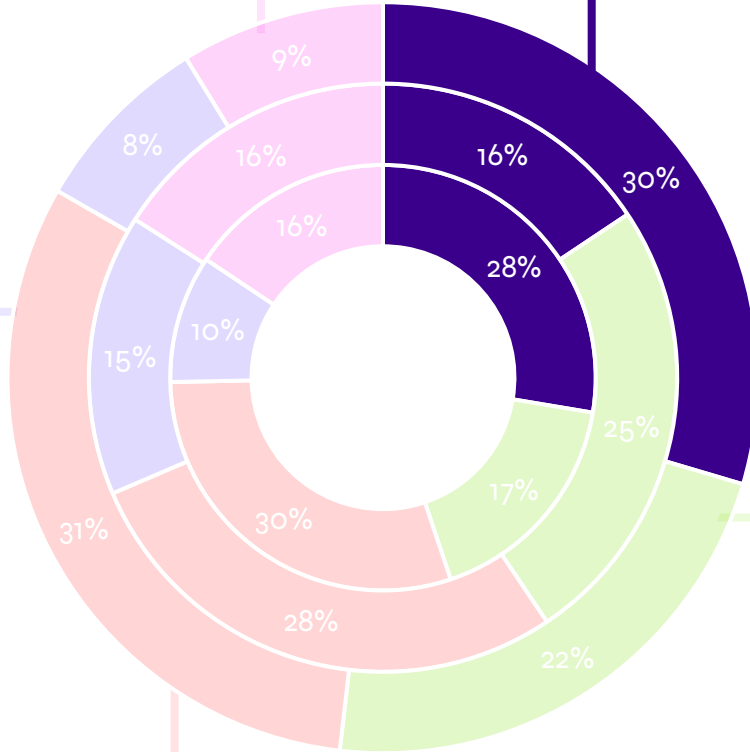
Musically
Happy



Modestly
Content

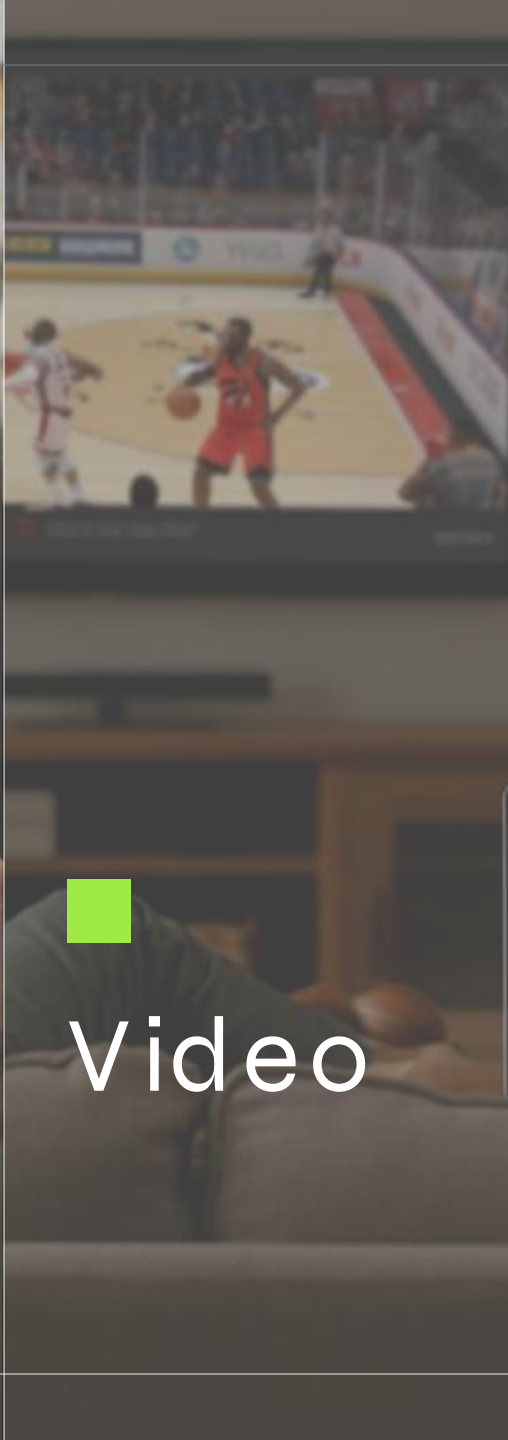


Relaxed
Retirees

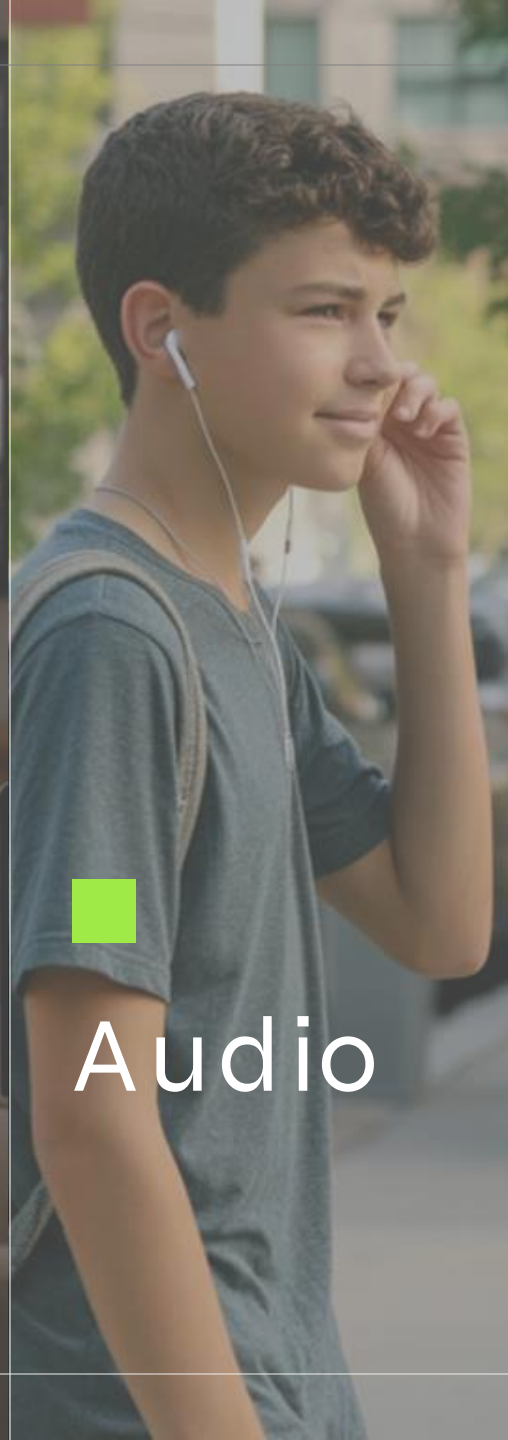




Retail
Media



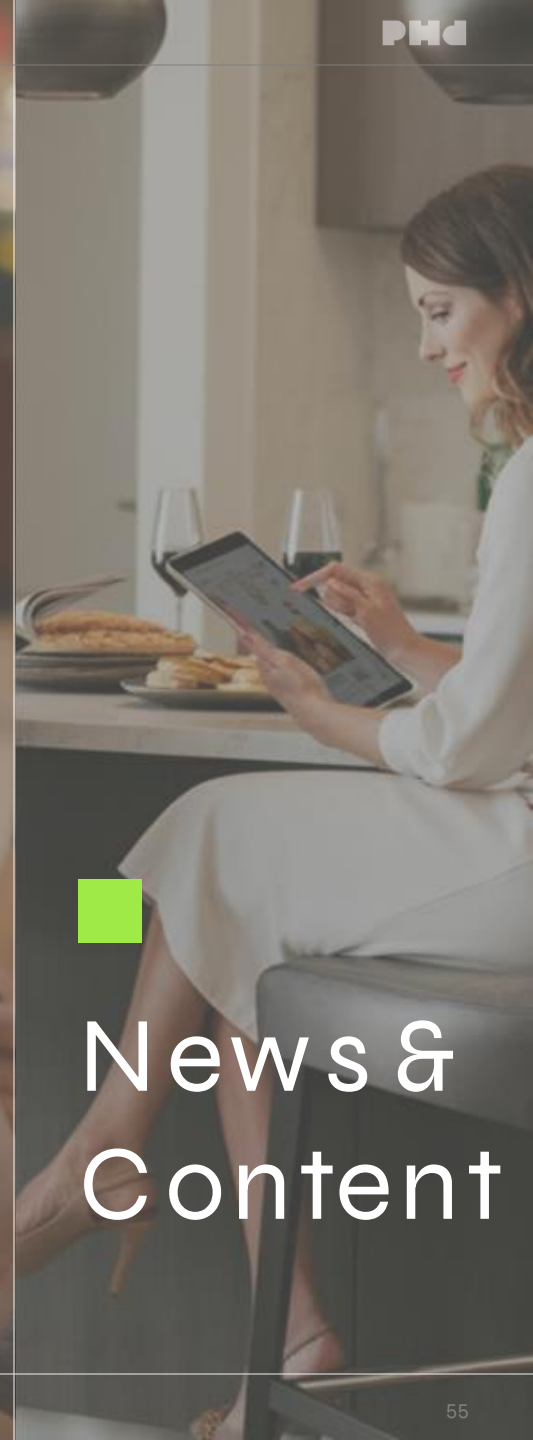
Video



Audio



Social
Media



News &
Content

The Implications: Overall



1

More digital media = more diversified experiences in digital



2

'Real life' tends to have a big impact on how we use media



3

We tend to over-estimate the scale of the 'biggest' players*



4

News & Content doesn't get the credit it deserves



5

We should probably all listen to more music

The Implications: Advertisers & Agencies



1

Stay ahead of
the shift to
Retail Media



2

Get to know
your market
beyond the
platforms



3

Win like a
small brand:
carving out
effective
targeted
reach
strategies



4

Win like a big
brand:
investing
consistently
and patiently



5

Measure the
short, and the
long