

# CMUST 2024

The Canadian Media Usage Study  
French Canada

40%  
Parallel  
Timelines

60%  
Plots with  
Multiverse

# Time



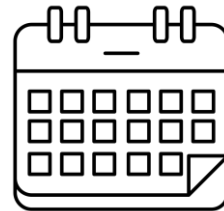
Ad Duration



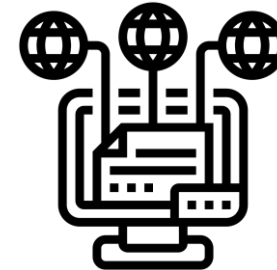
Attention



Timelines



Attribution  
Windows



Hourly  
Rates





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



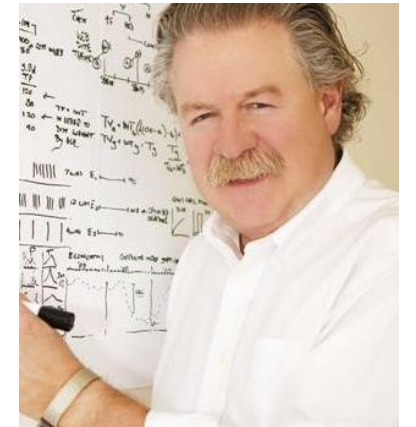
Global Media & Internet  
Concentration Project



omni



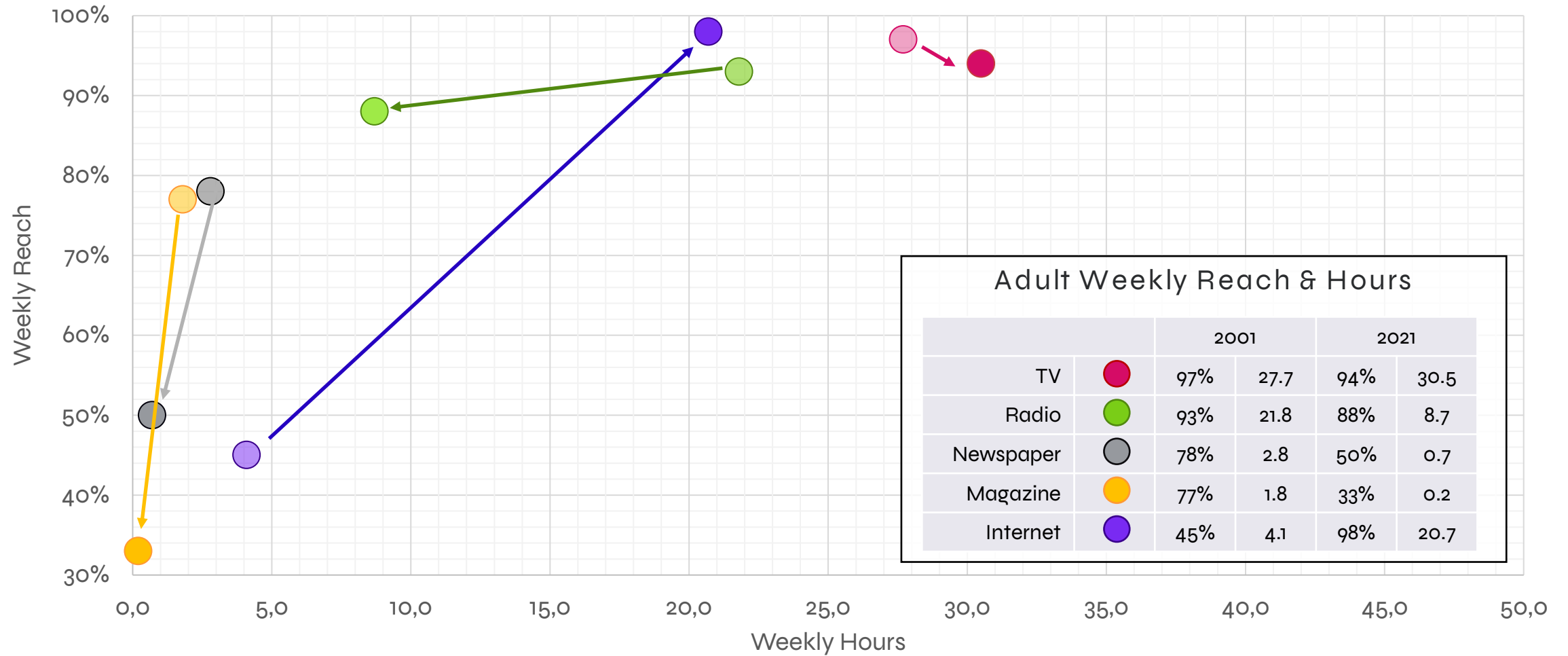
iab  
canada



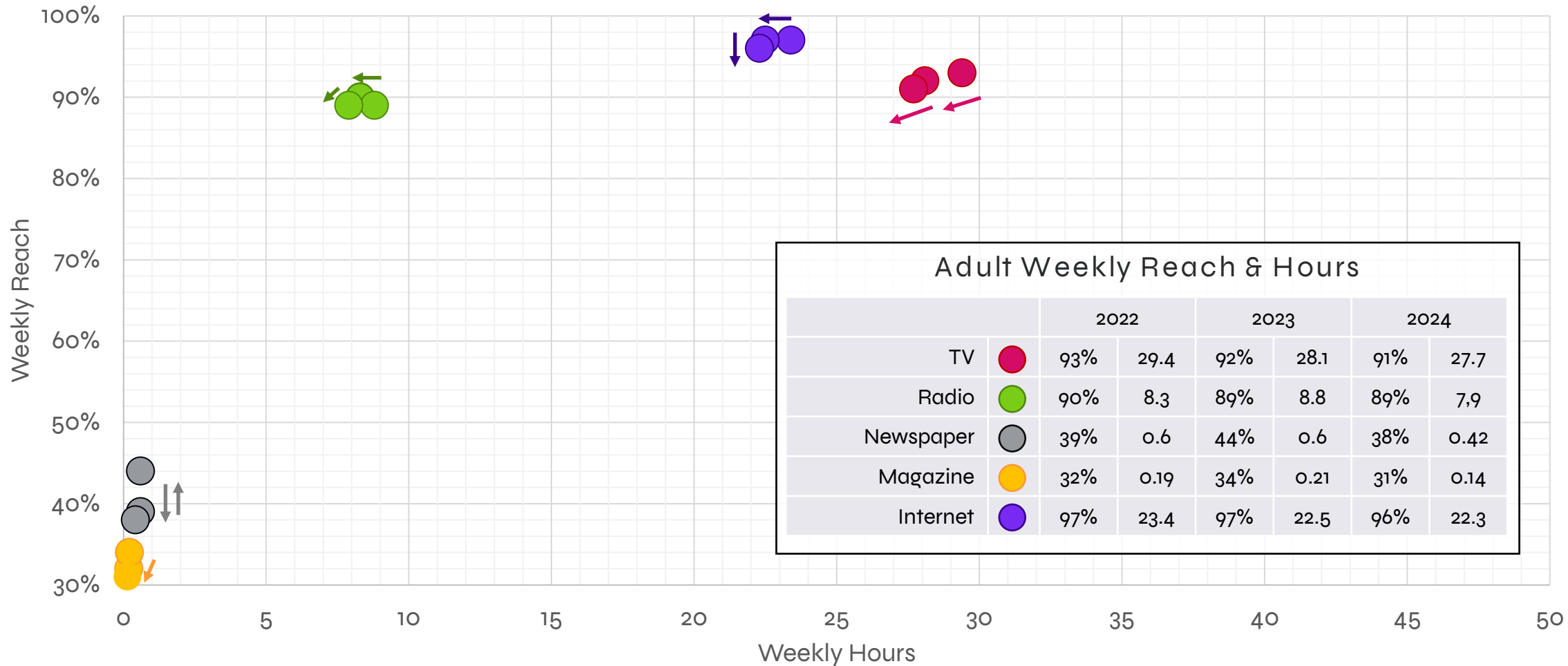
# Growth

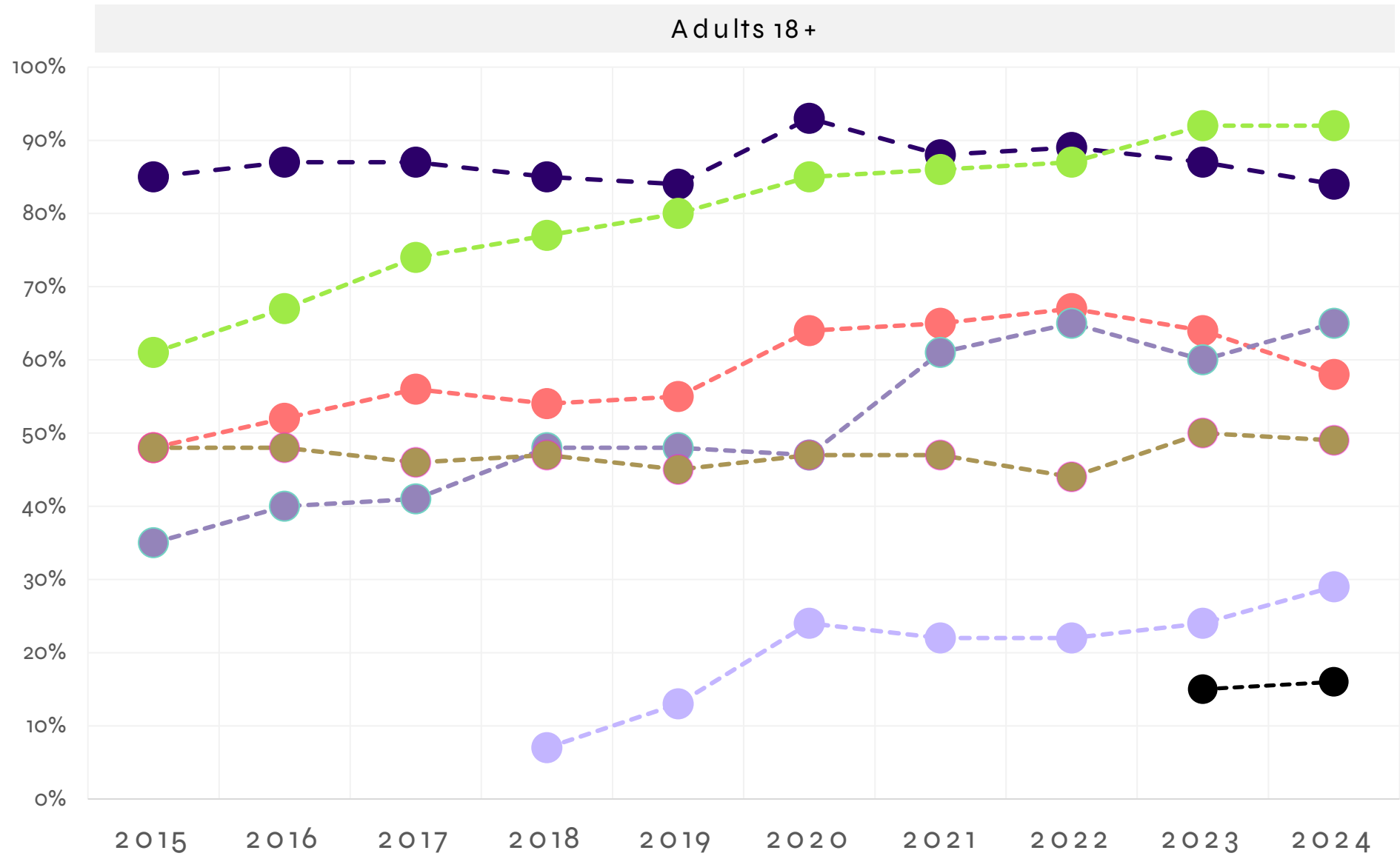
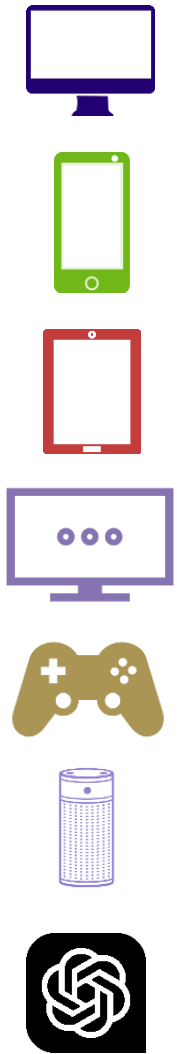


# A 20-year trend



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







**Under  
30**



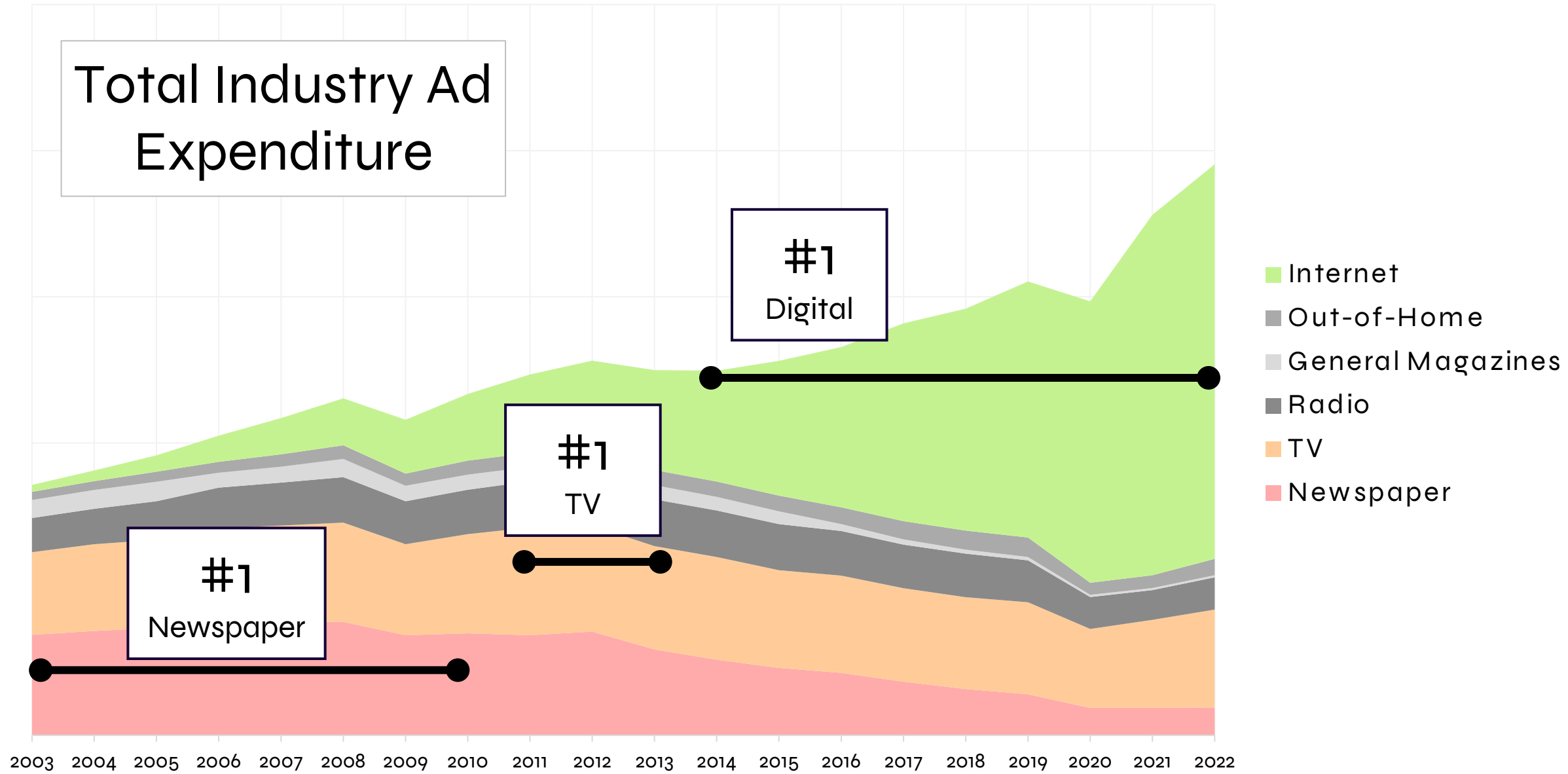
**30-54**



**55+**



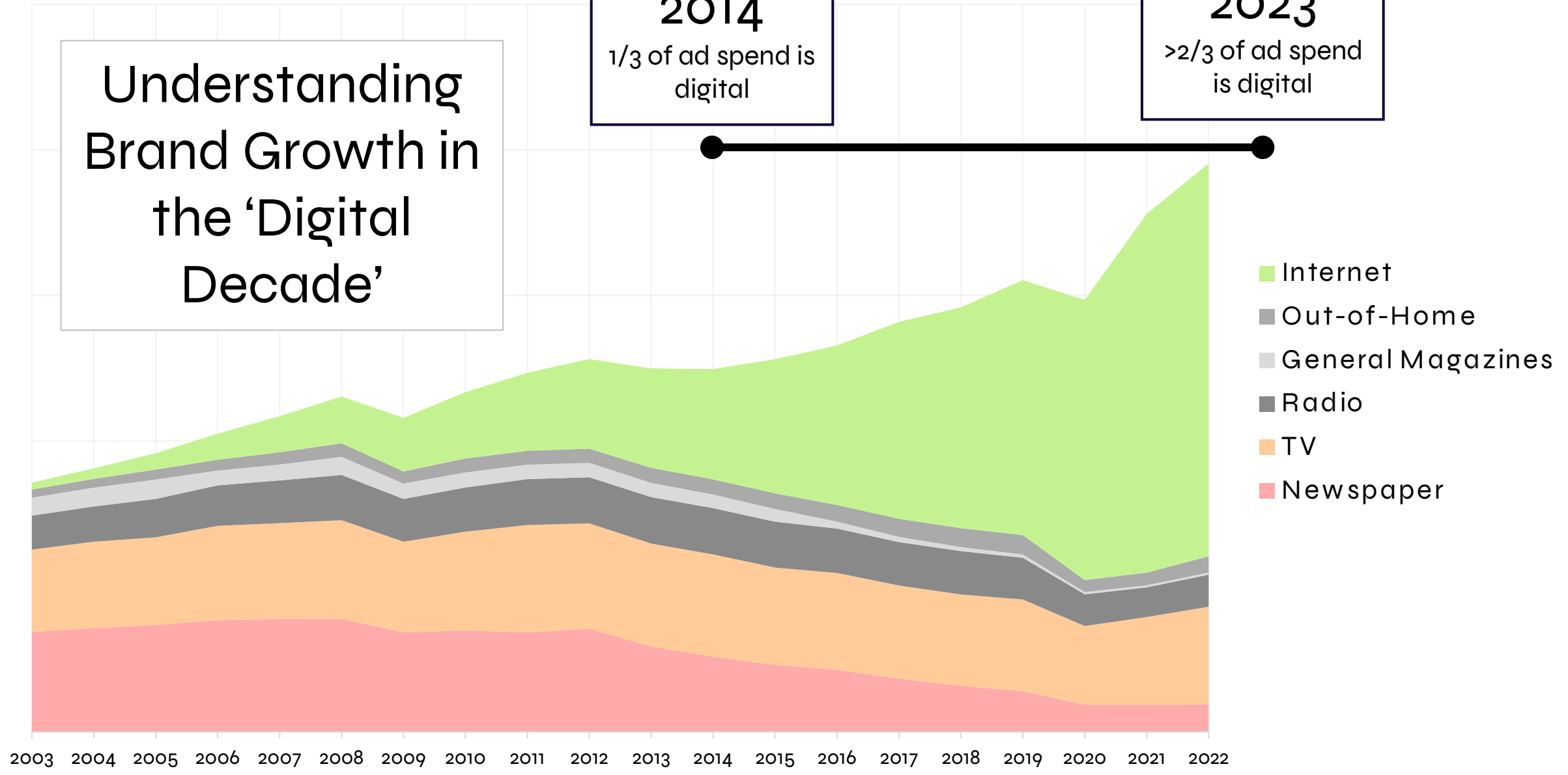
# Total Industry Ad Expenditure



# Understanding Brand Growth in the 'Digital Decade'

**2014**  
1/3 of ad spend is digital

**2023**  
>2/3 of ad spend is digital



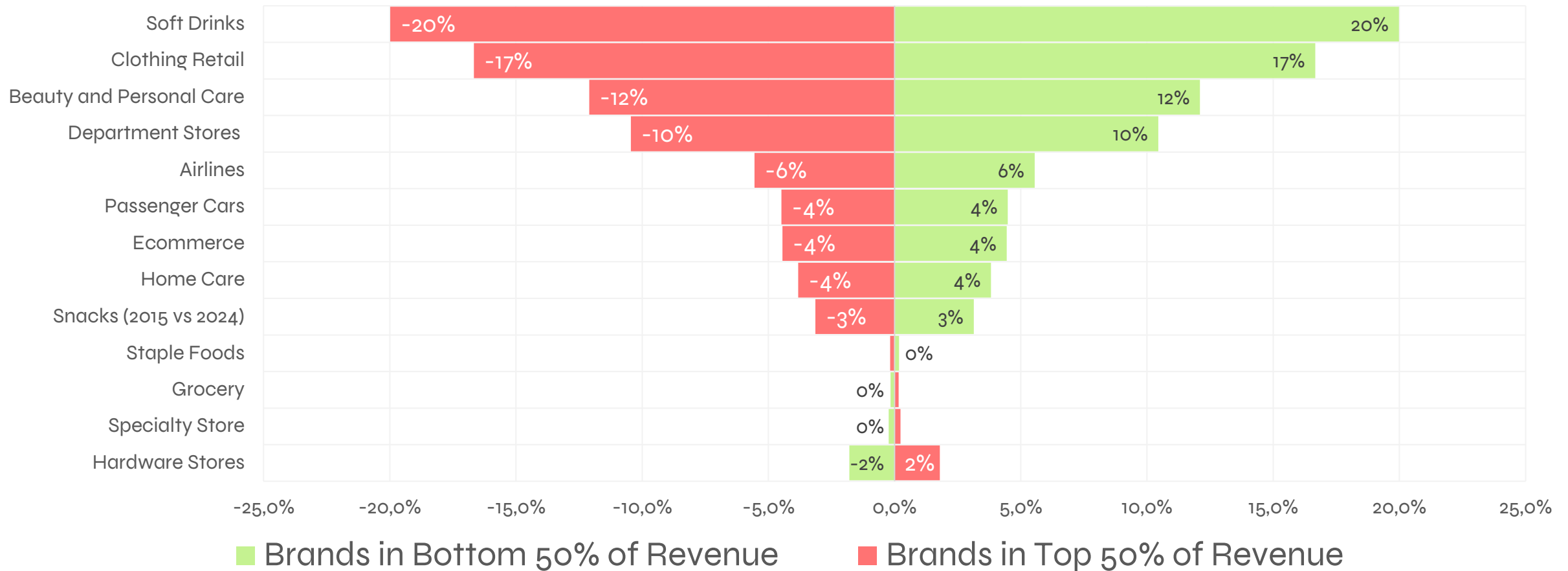
14 Categories

400+ Brands

10 Years

## On Average: Big Brands Lost. Little Brands Gained.

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



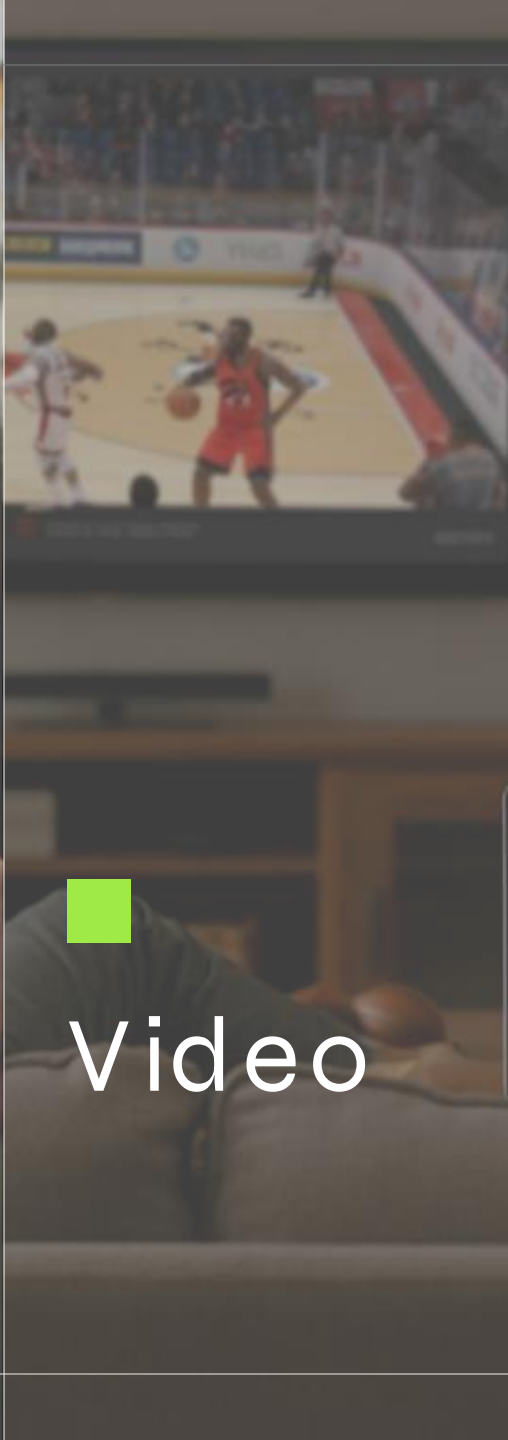
Big Brands that invested more in (offline) media tended to see more growth

8 out of 14

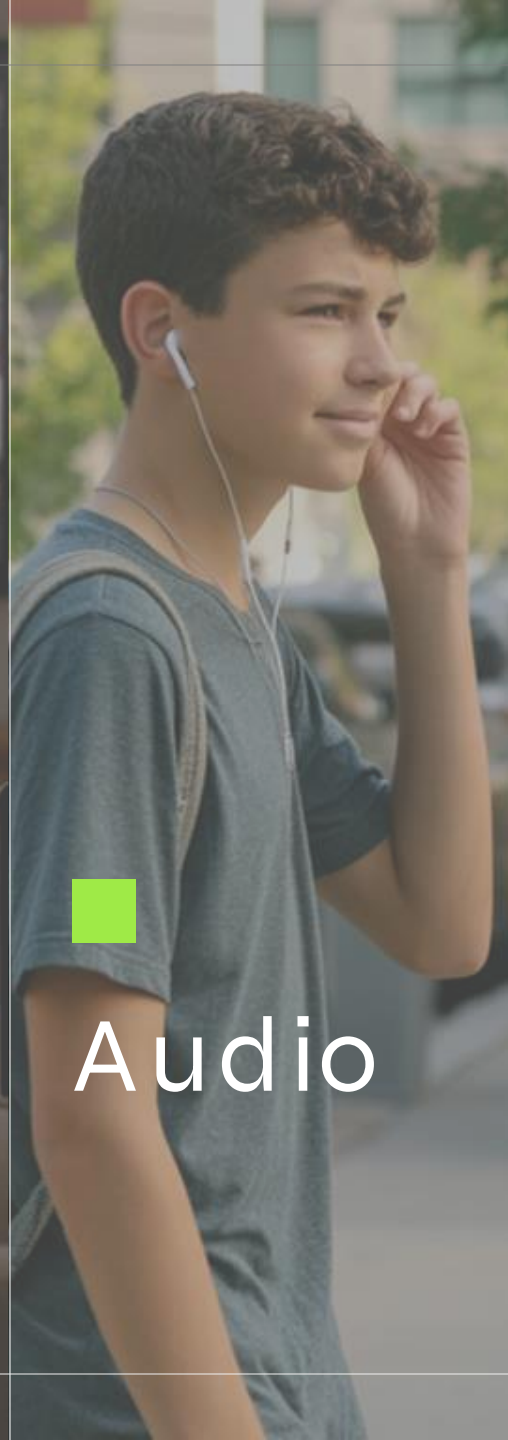
Categories showed a clear relationship between sustained  
offline share of voice and brand growth



Retail  
Media



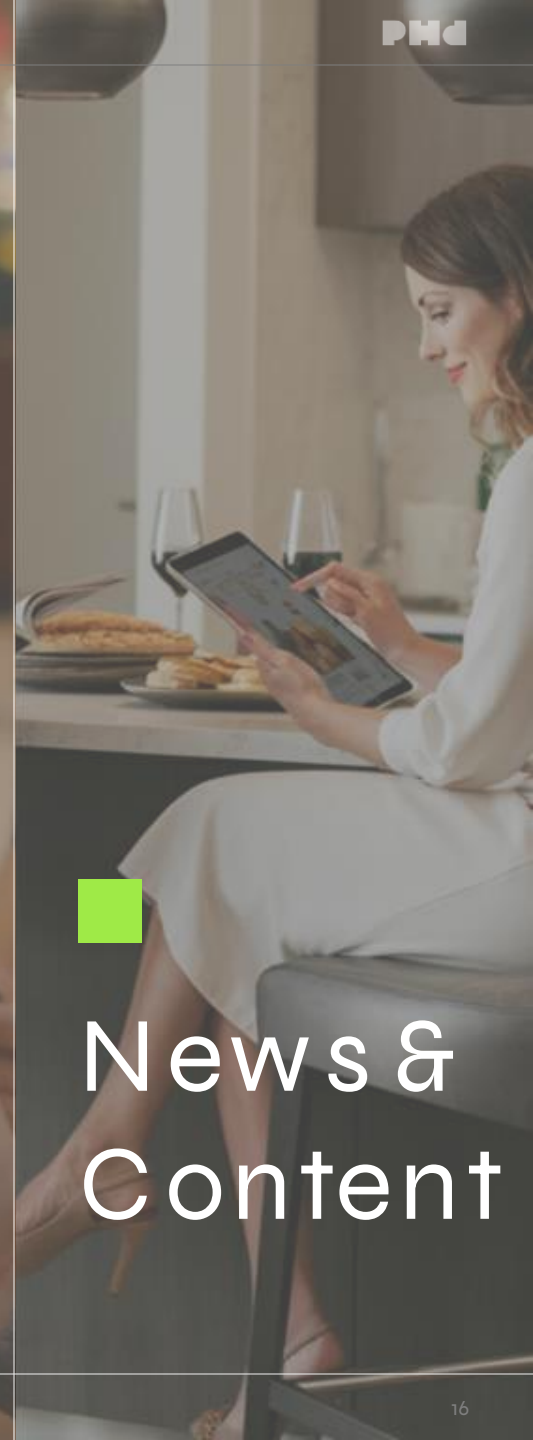
Video



Audio



Social  
Media



News &  
Content



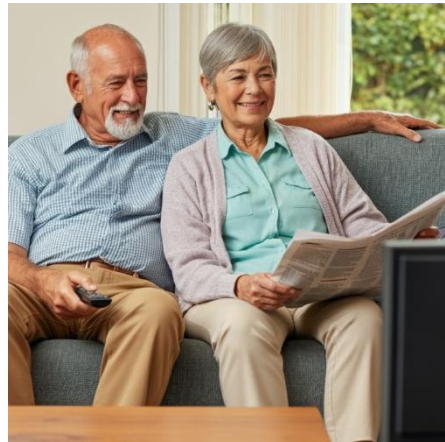
Anxiously  
Affluent



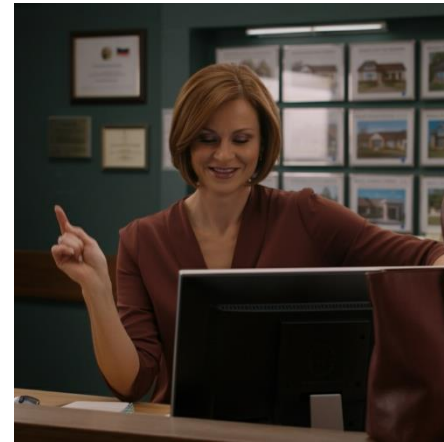
Modestly  
Content



Relaxed  
Retirees




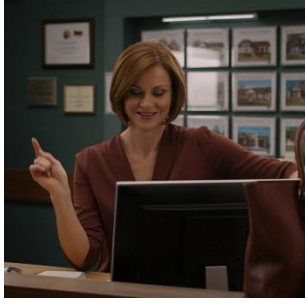














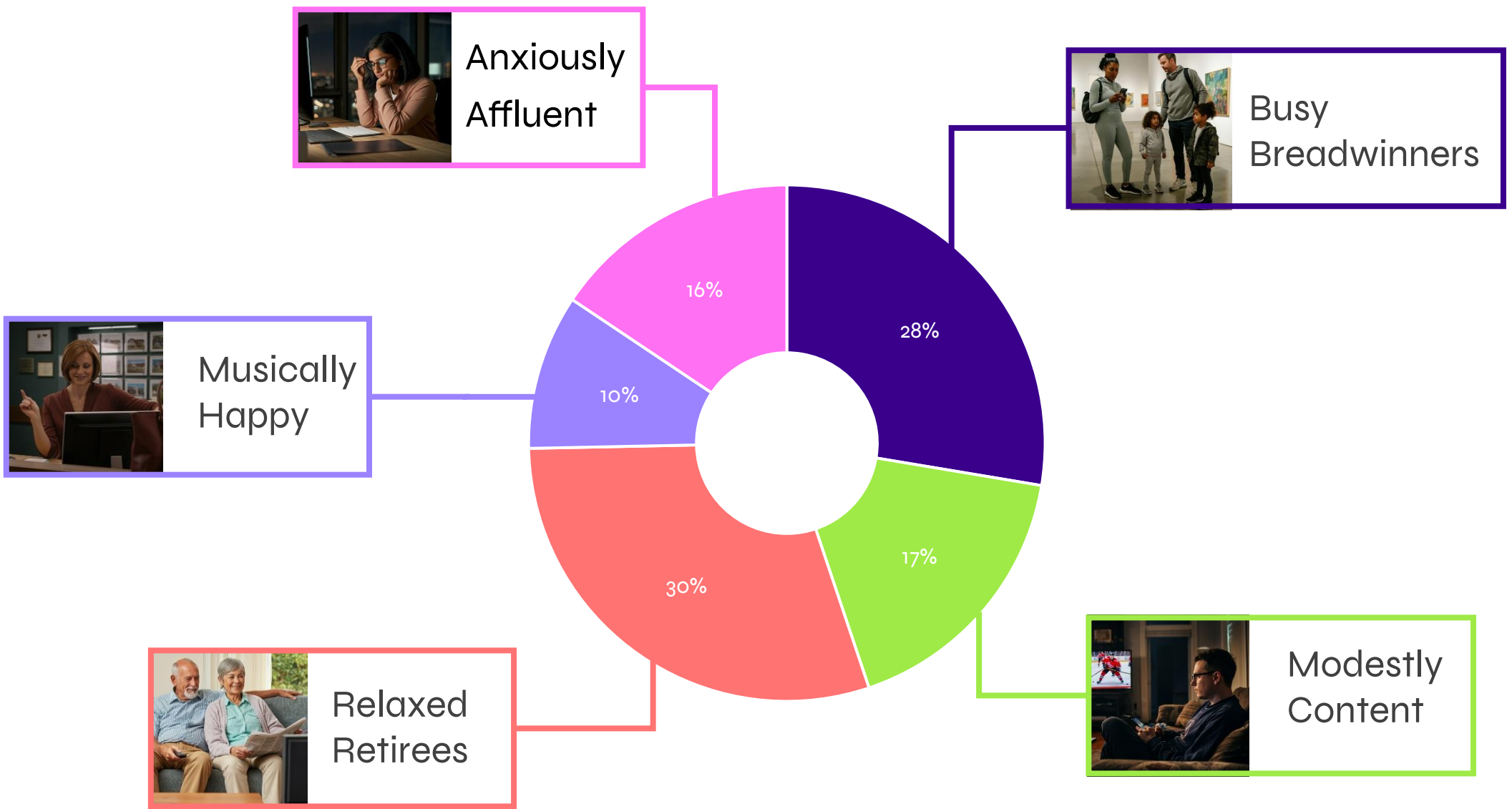
Musically  
Happy



Busy  
Breadwinners




	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




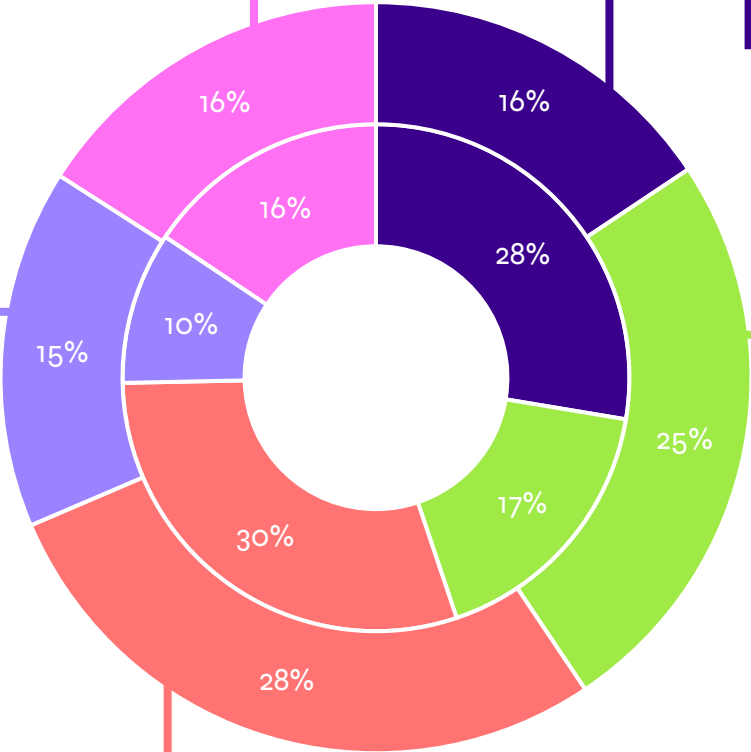
Anxiously  
Affluent




Busy  
Breadwinners



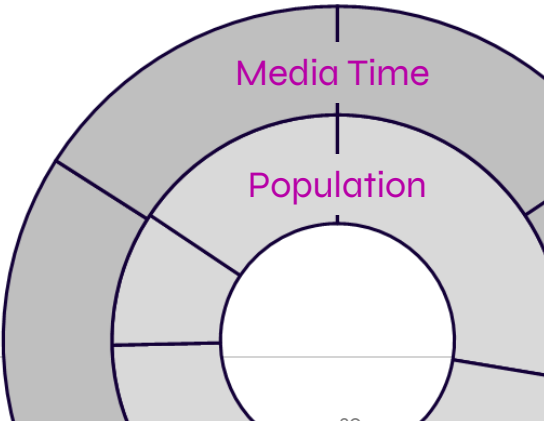
Musically  
Happy



Modestly  
Content



Relaxed  
Retirees

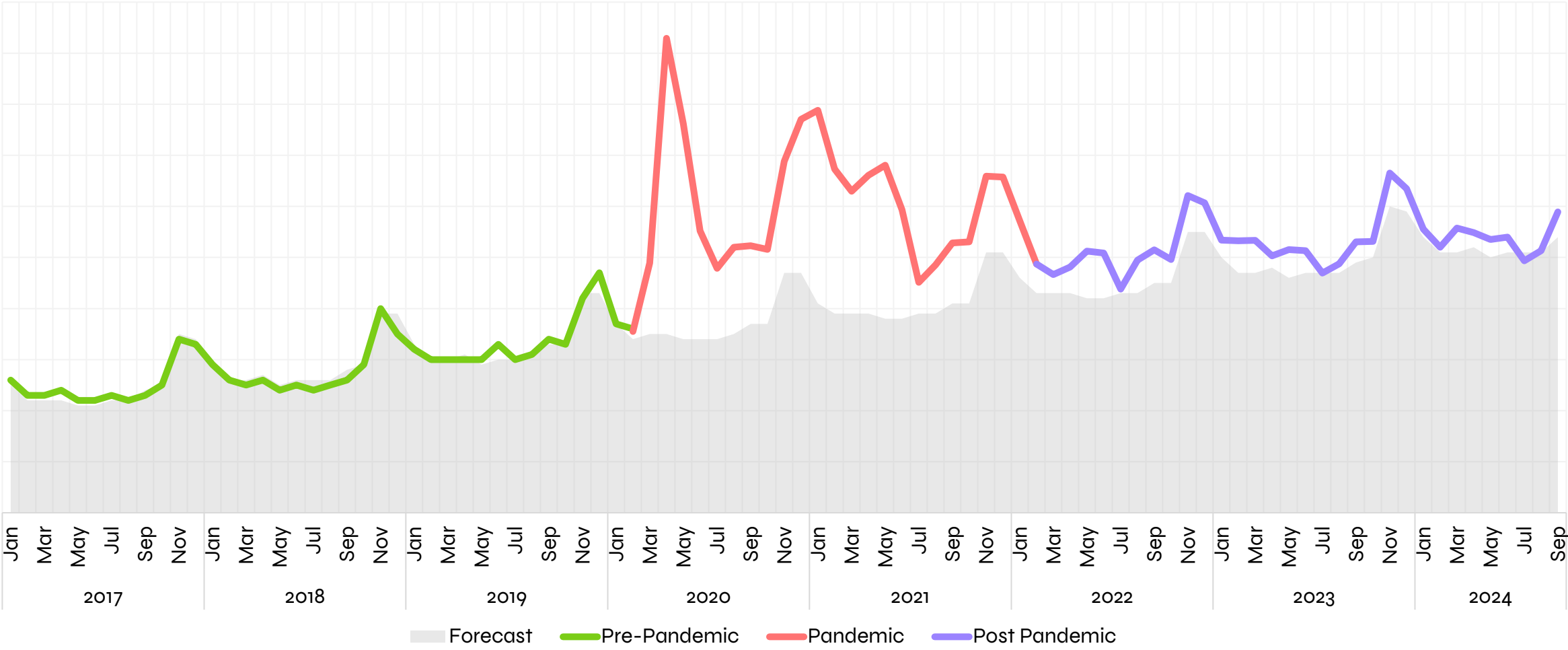


# Retail Media



# 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

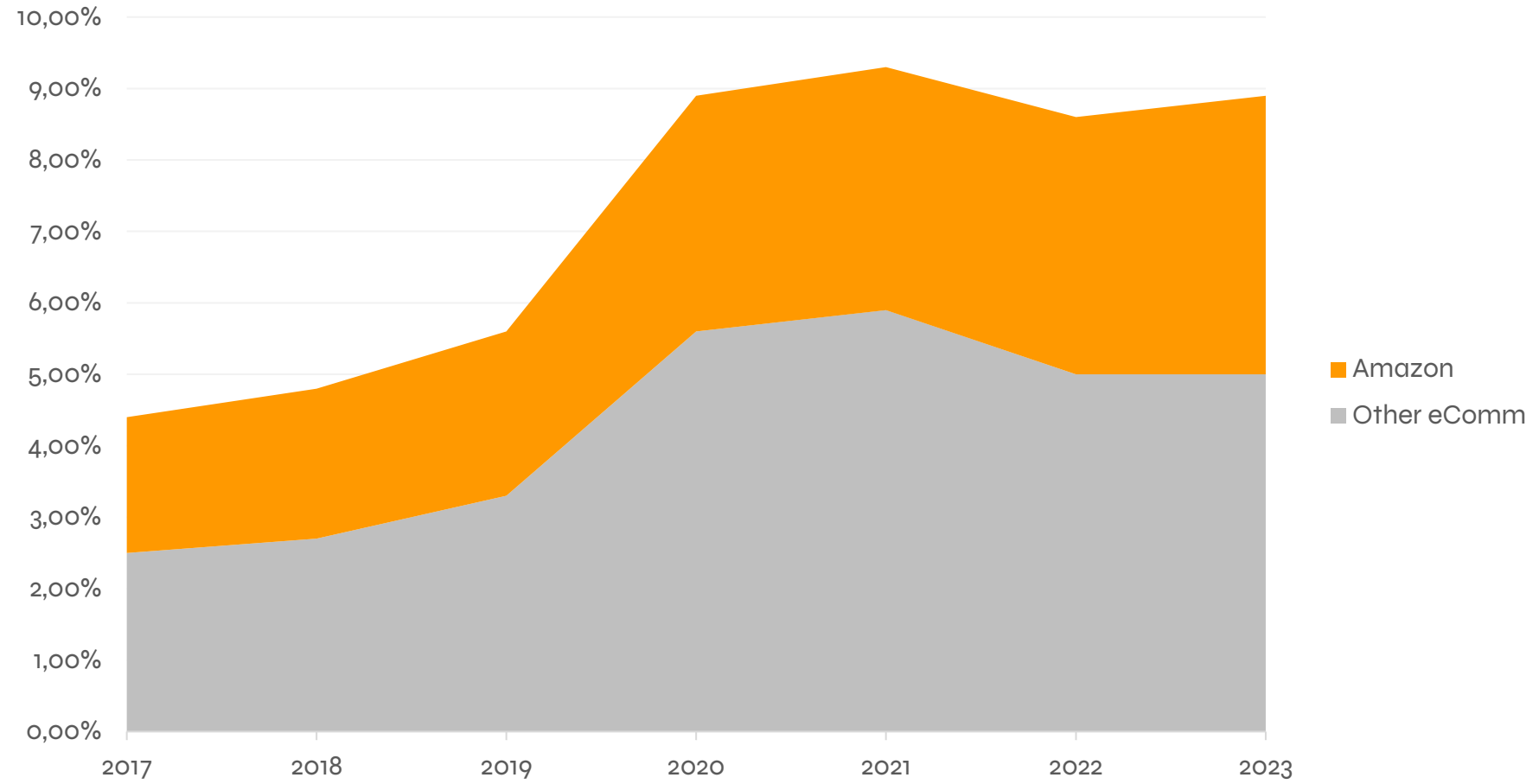
43%

Amazon's share of eCommerce Retail

28

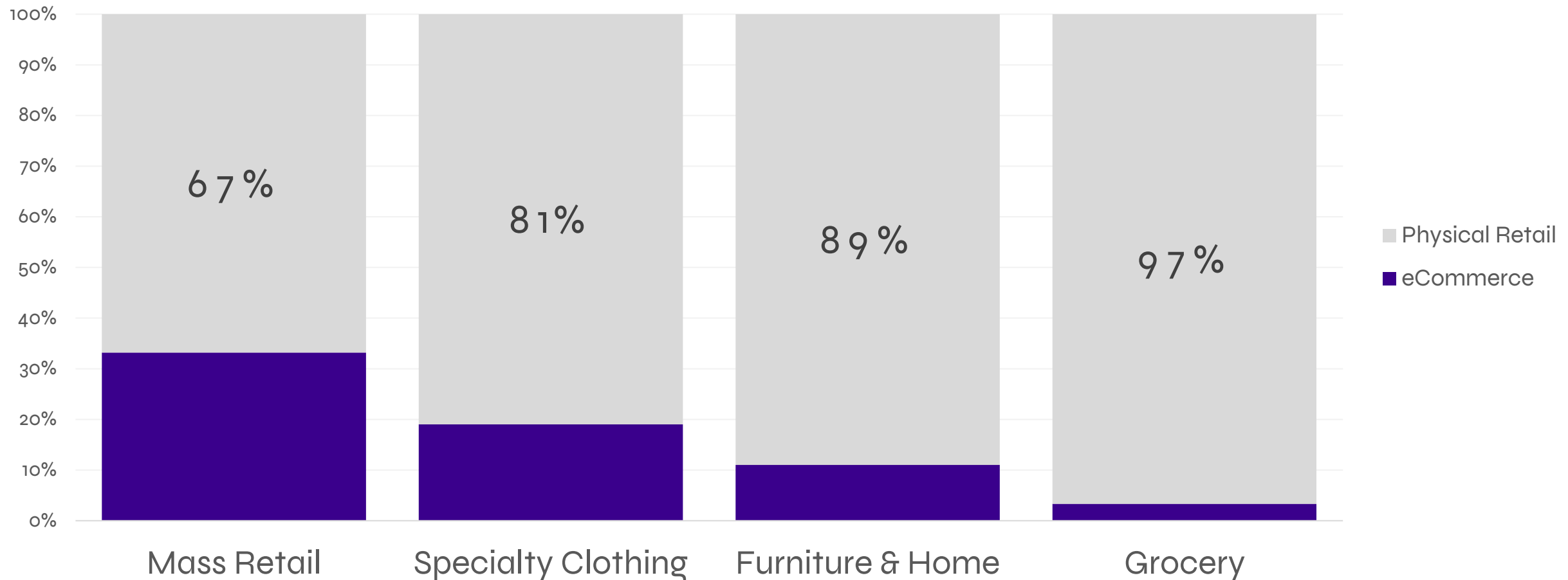
Top Retail brands combine for the equivalent share in physical retail

### Amazon vs rest of Ecommerce



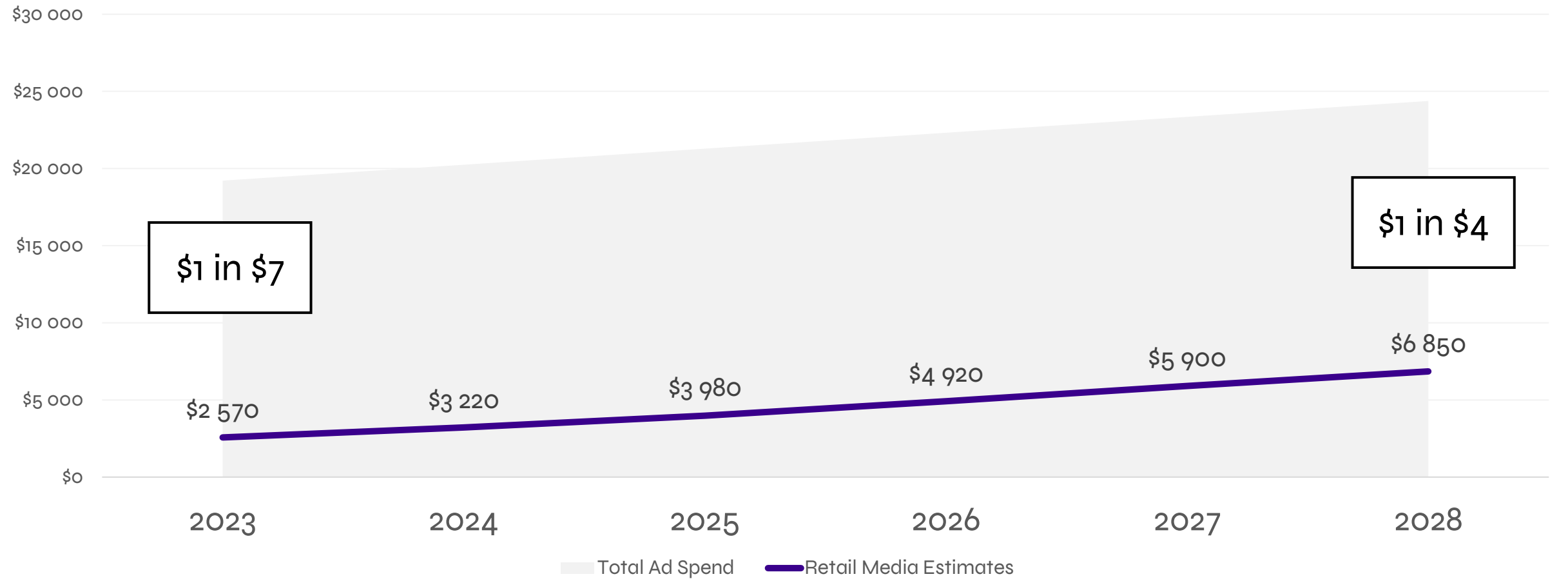
## eCommerce Penetration Varies by Category

Share of Spend – eCommerce vs Physical Retail by Category



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

Forecast Total Ad Spend & Retail Media Spend

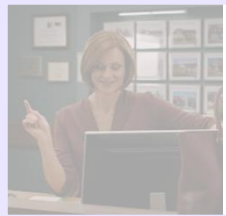




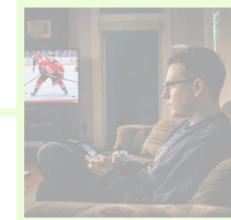
Anxiously  
Affluent



Busy  
Breadwinners



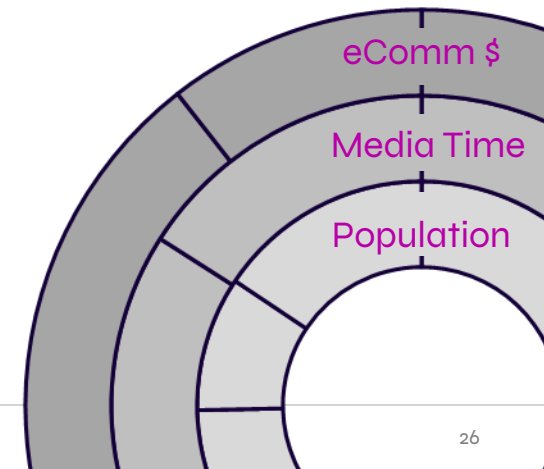
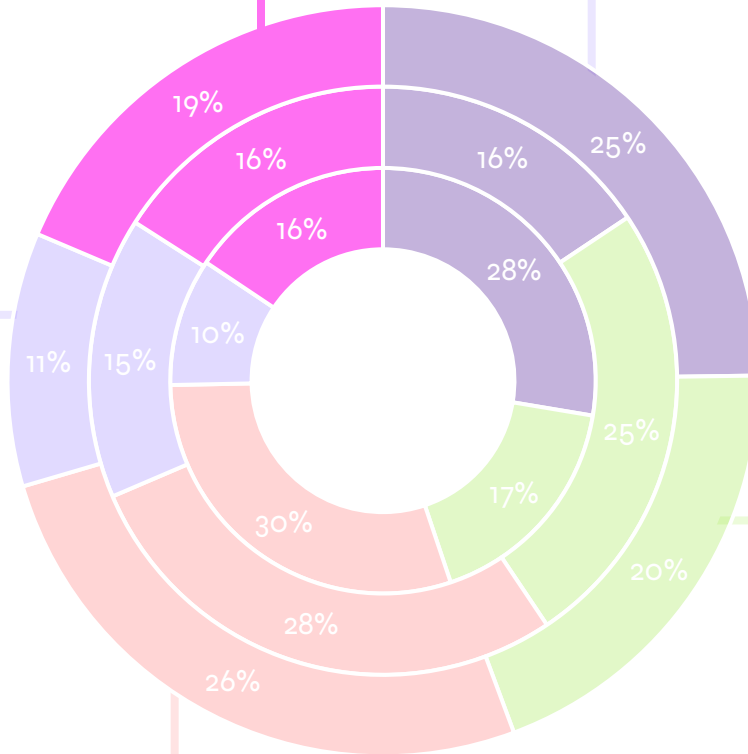
Musically  
Happy



Modestly  
Content



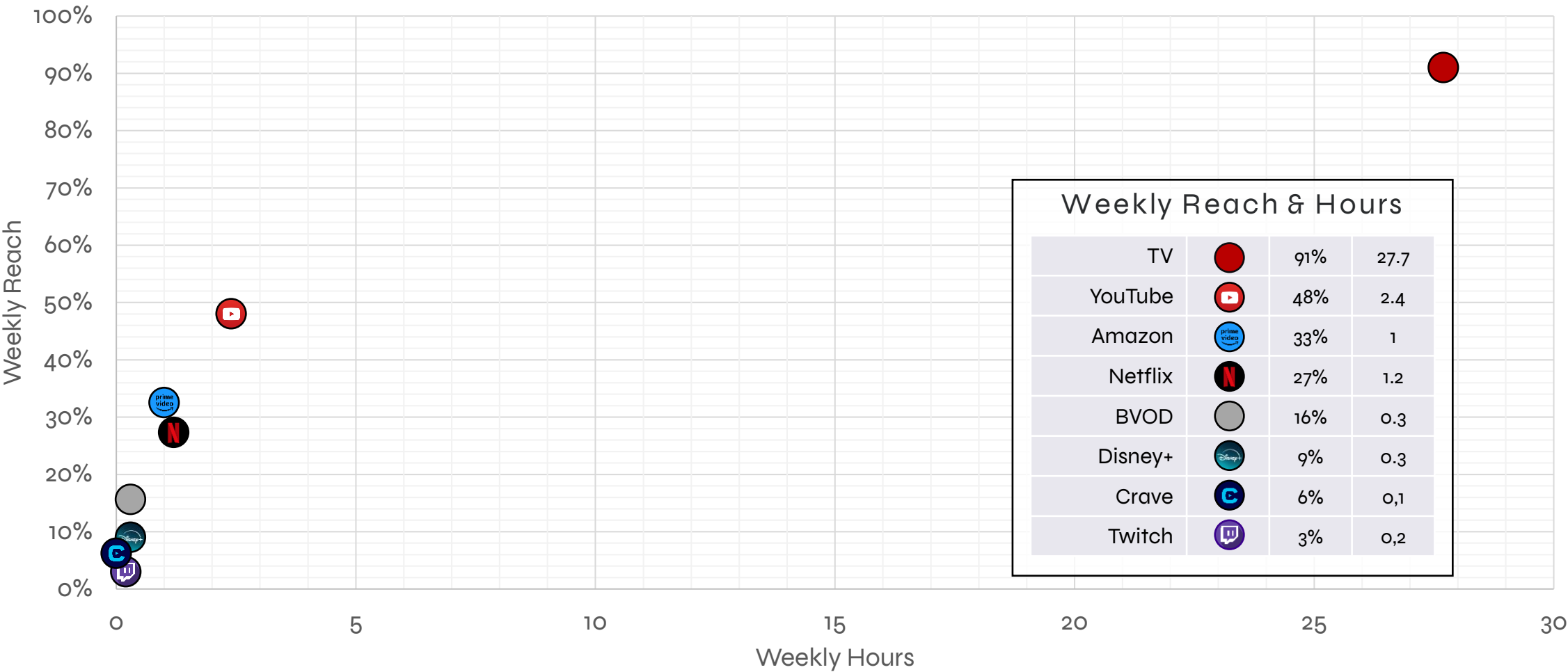
Relaxed  
Retirees



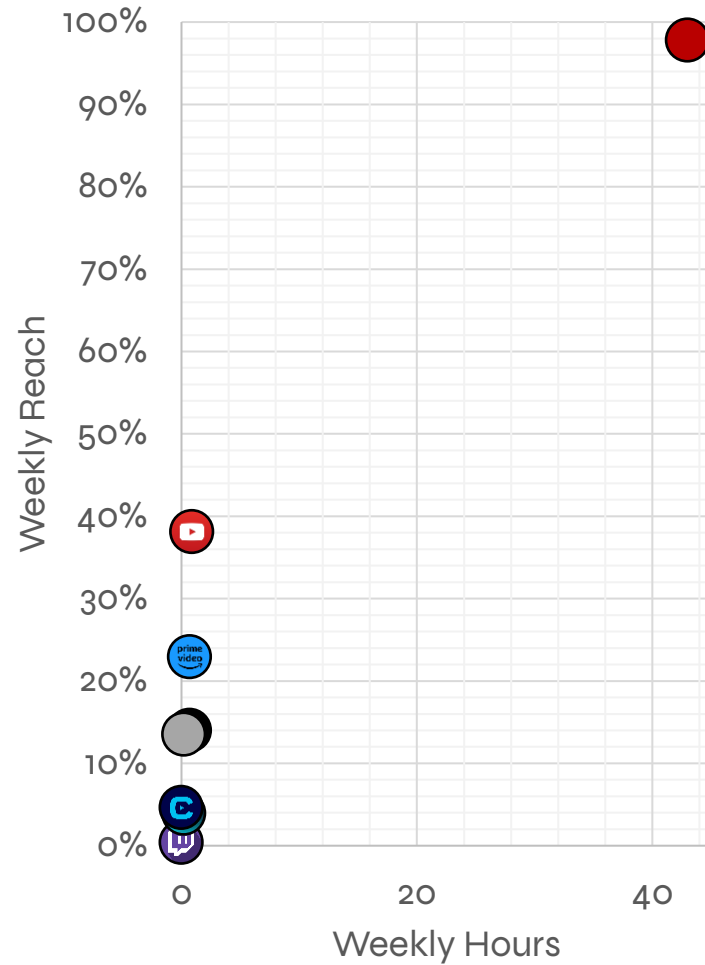
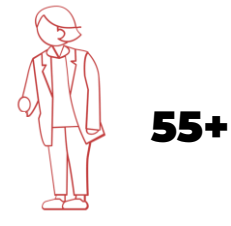
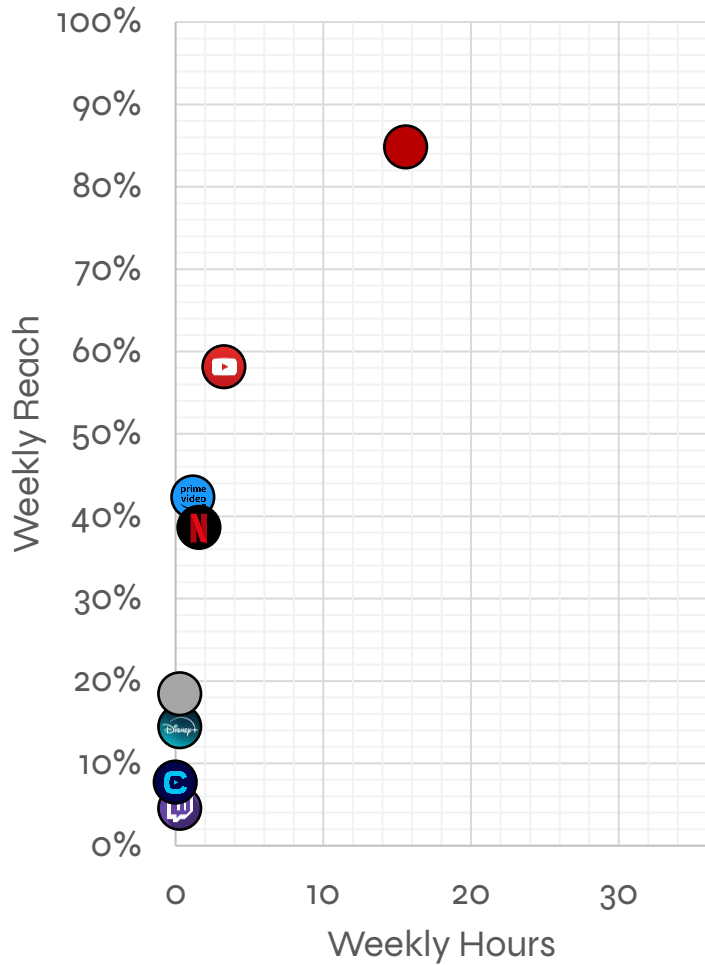
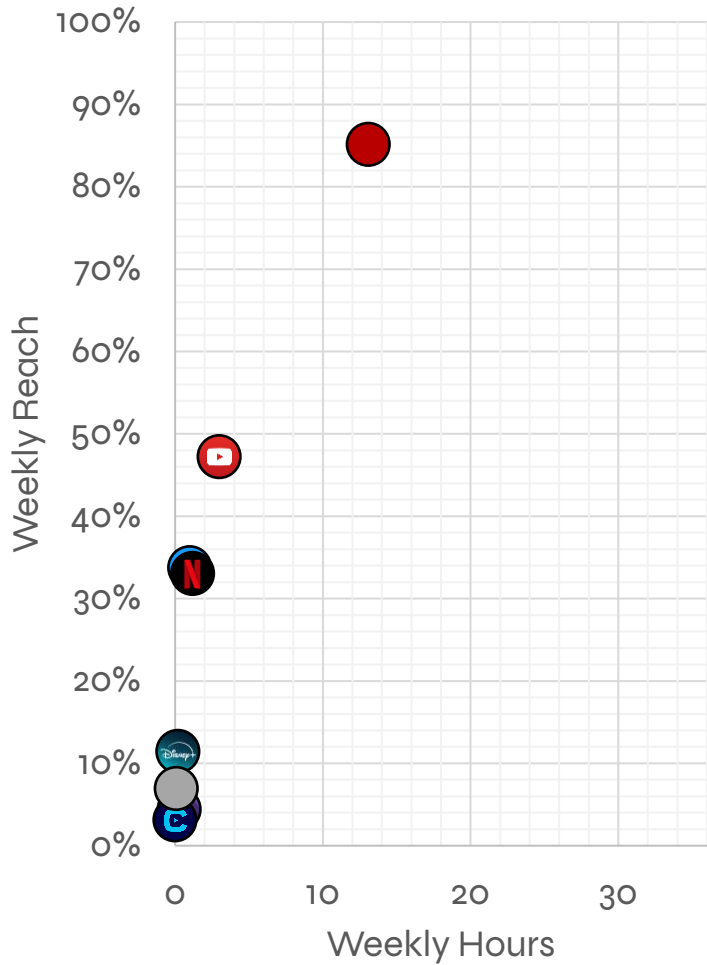
# Video



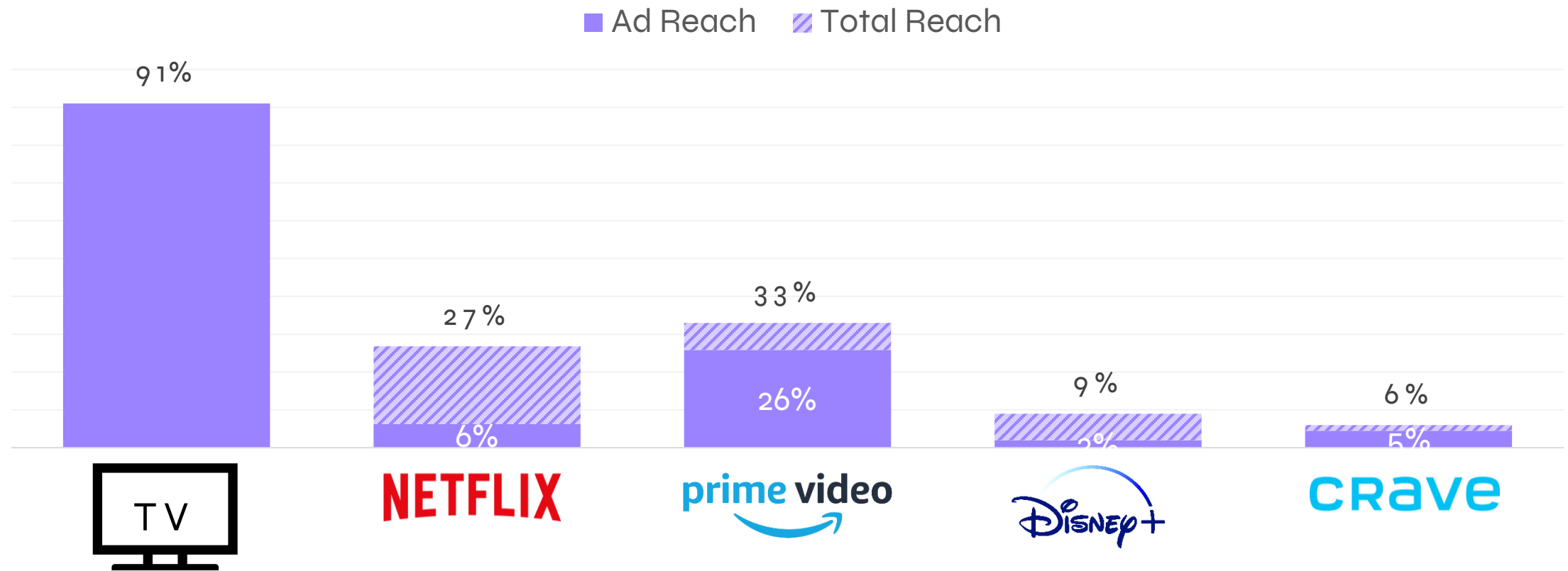
# Linear Television Continues to Dominate Reach & Time Amongst 'Total Adults'



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



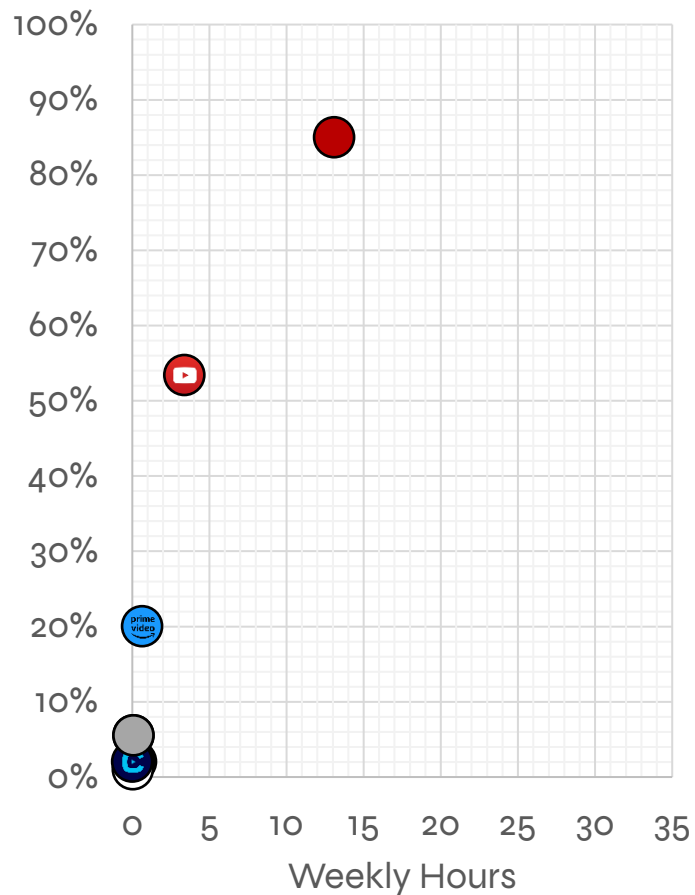
Platform reach is not necessarily ad reach.



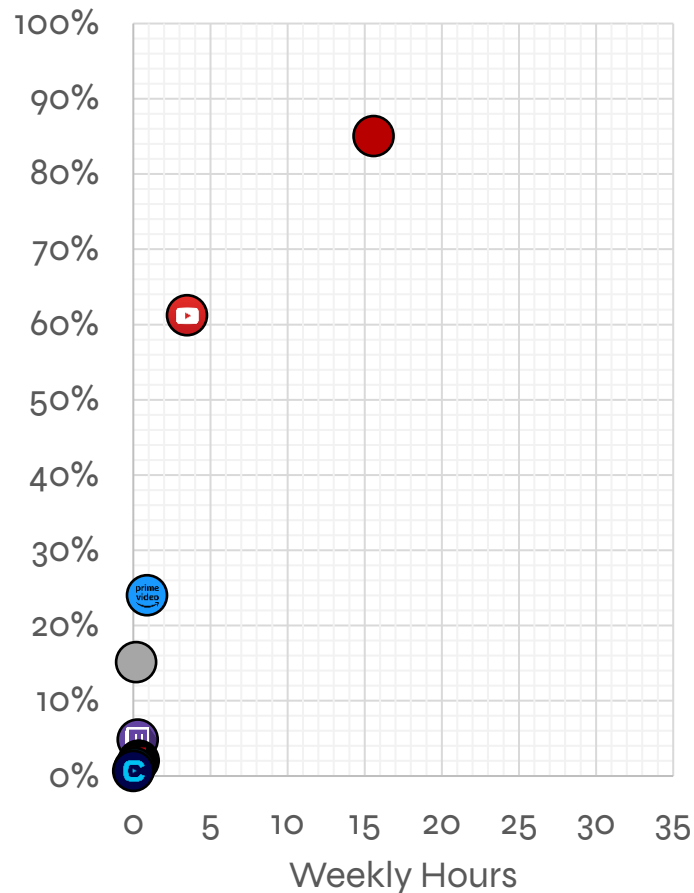
Source : PHD Database, A18+, AvMtlyReach(%), Canada, Jan-July 2024  
(AVERAGE : VAM-Numeris (Reach), MTM (Reach + Reach with Ads) & Vividata Metrica (Reach with Ads))



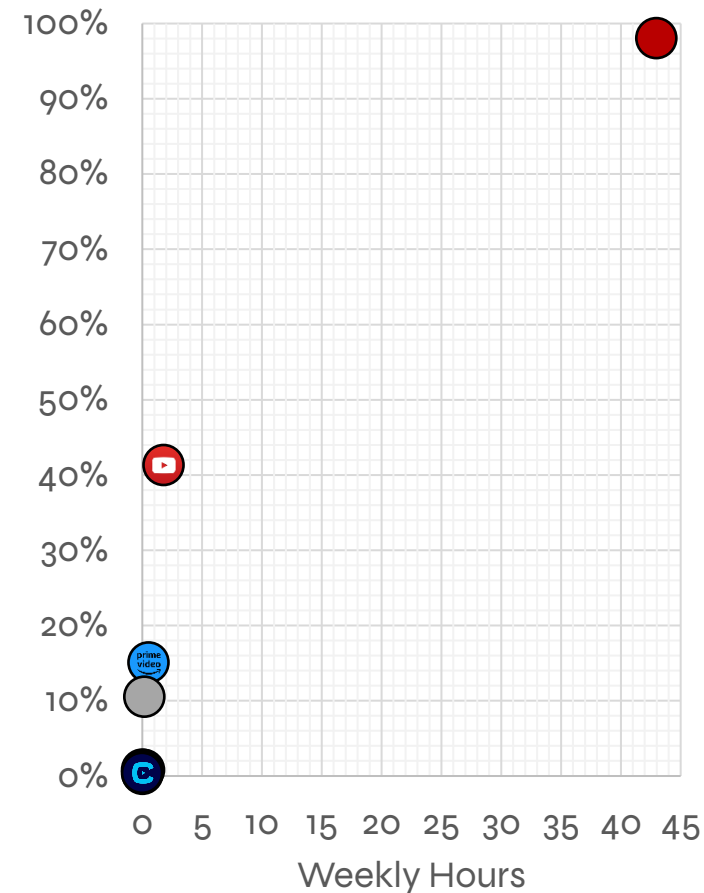
**Under  
30**









**30-54**



**55+**



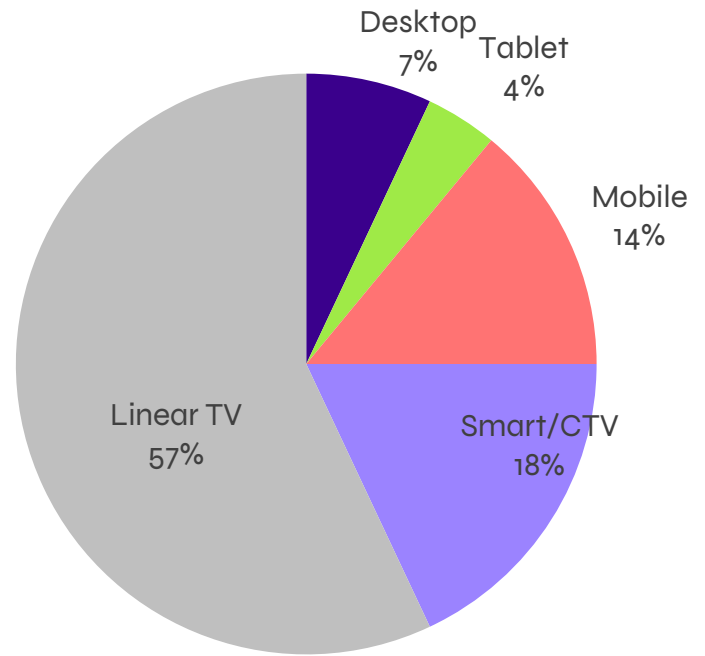
## Significant Overlap in Subscription Types – especially between TV and Streamers

		<b>NETFLIX</b>			<b>CRaVE</b>
		38%	33%	17%	11%
<b>NETFLIX</b>	83%		57%	32%	17%
	83%	66%		34%	20%
	82%	71%	61%		20%
<b>CRaVE</b>	87%	62%	59%	33%	

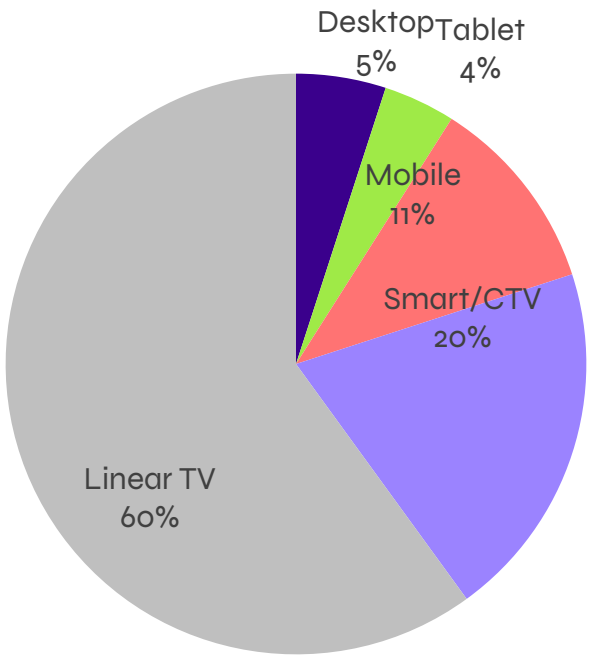
# Time Spent by Device Shows High Potential for Addressability



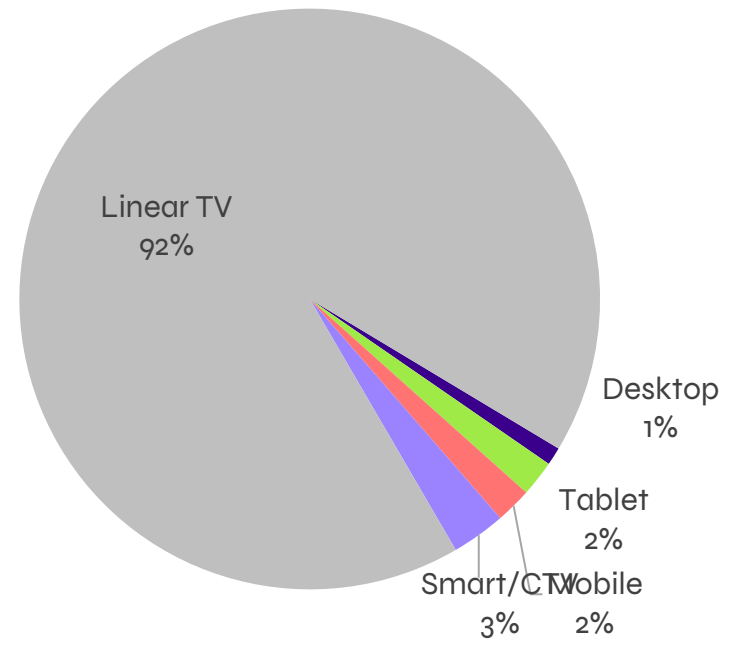
**Under  
30**

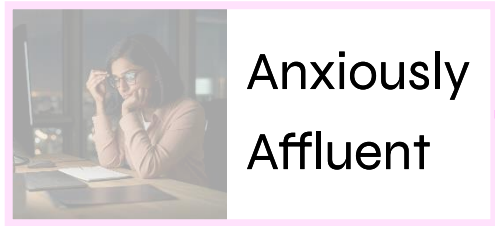


**30-54**

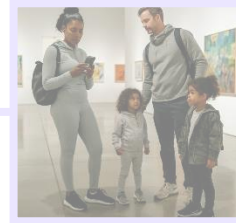


**55+**

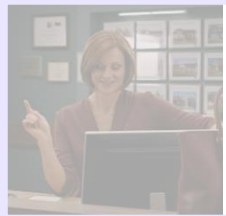




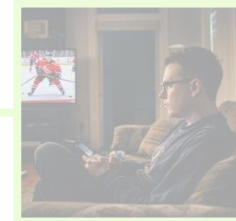
Anxiously  
Affluent



Busy  
Breadwinners



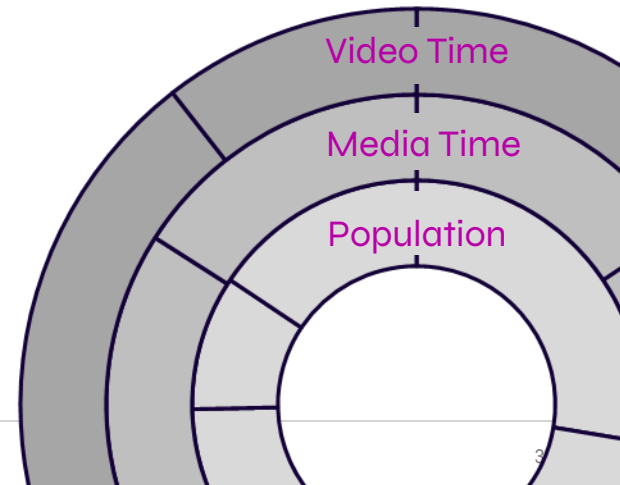
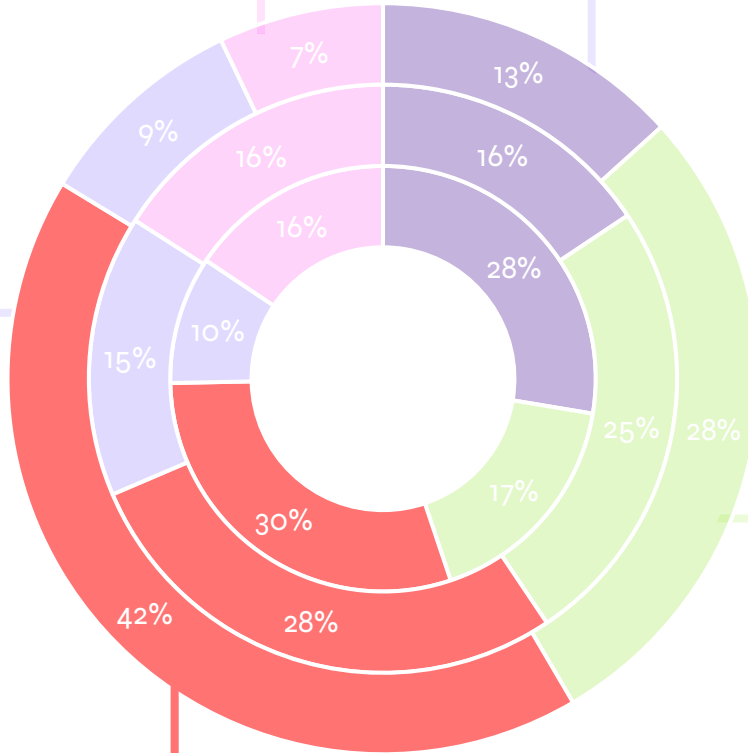
Musically  
Happy



Modestly  
Content



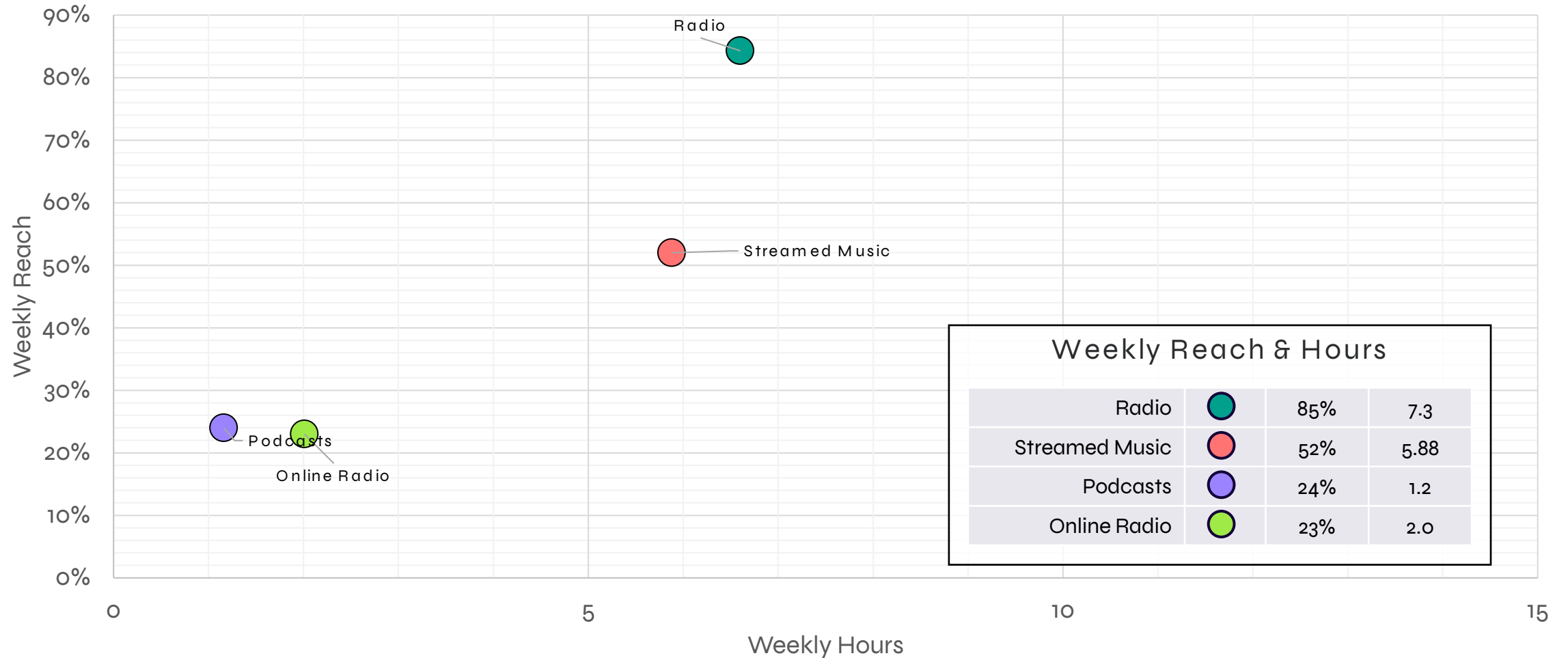
Relaxed  
Retirees





# Audio

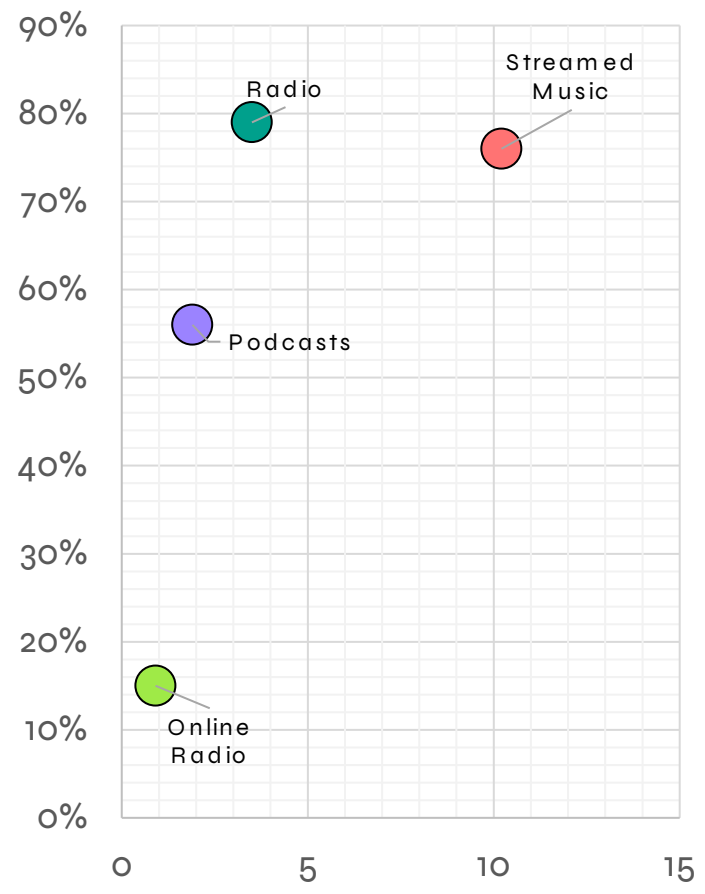
# Radio continues to be #1 overall



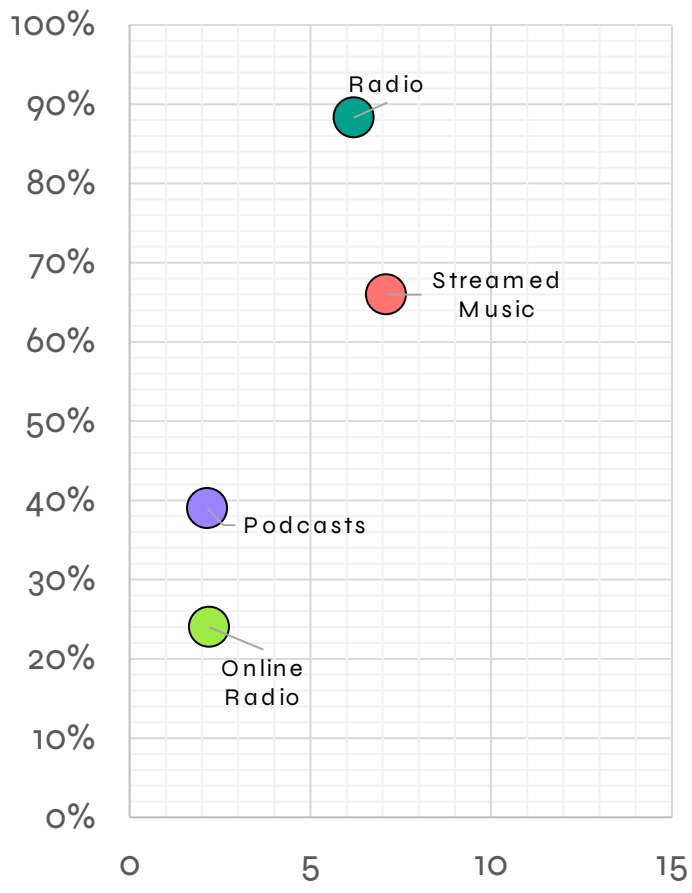
Source: Numeris PPM Radio, MTM Spring 2023, PHD estimates from multiple industry sources,



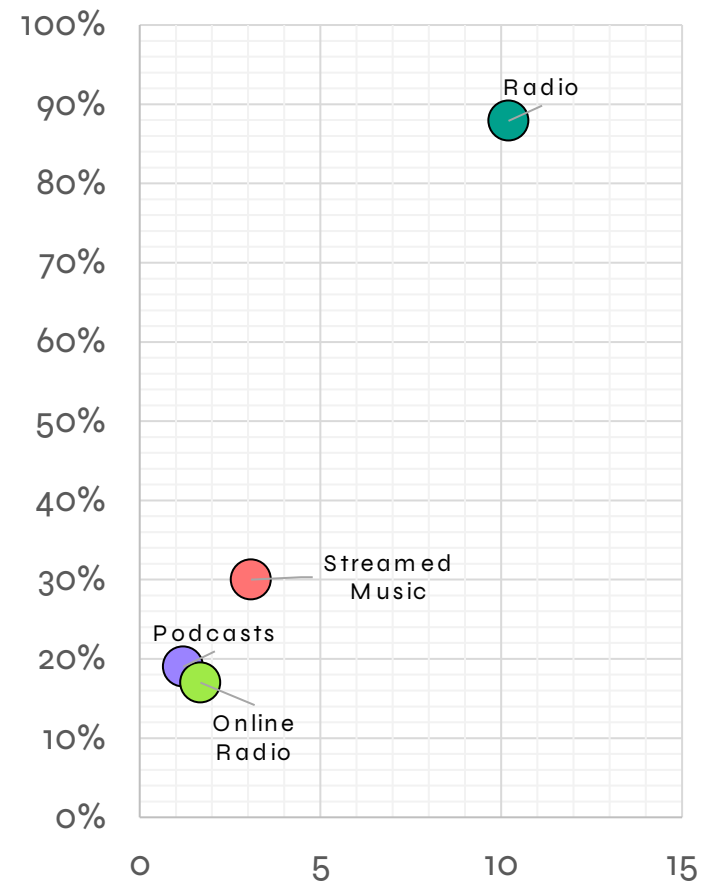
### Under 30

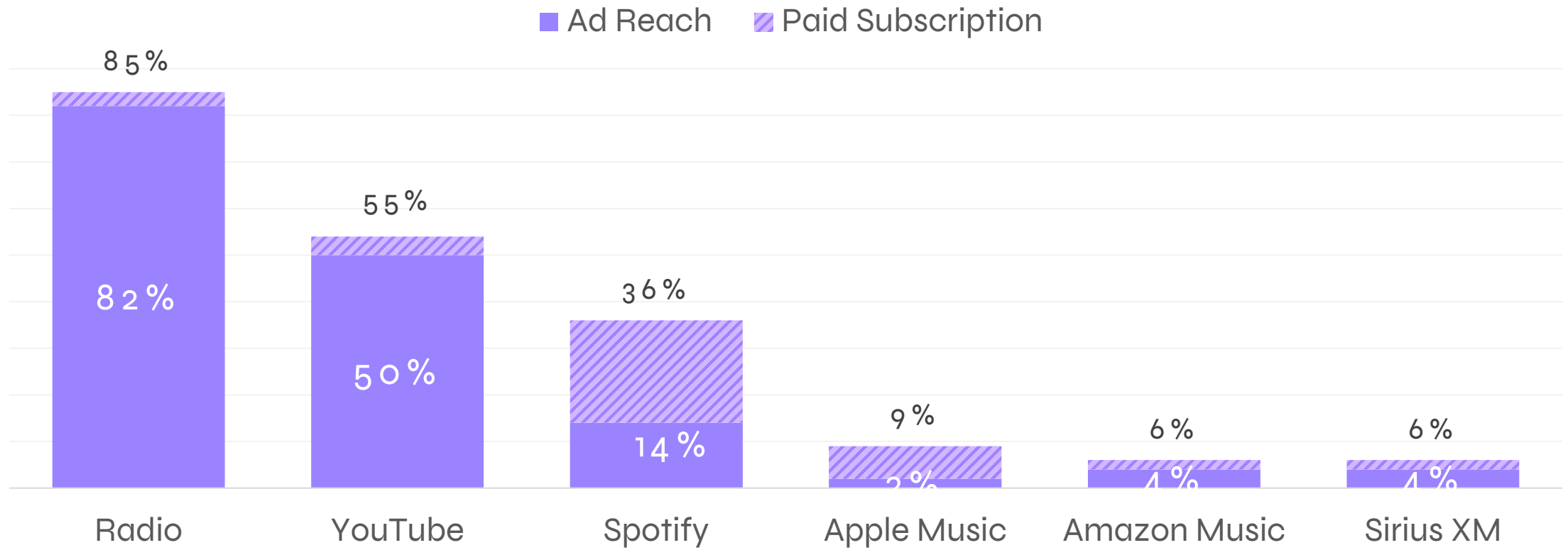


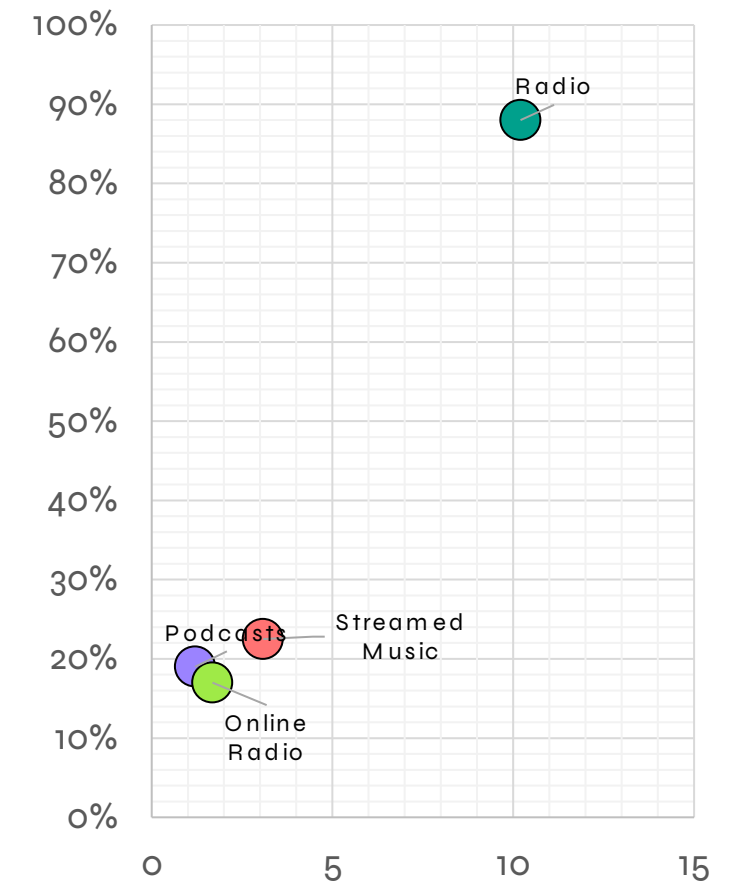
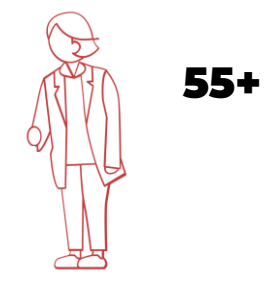
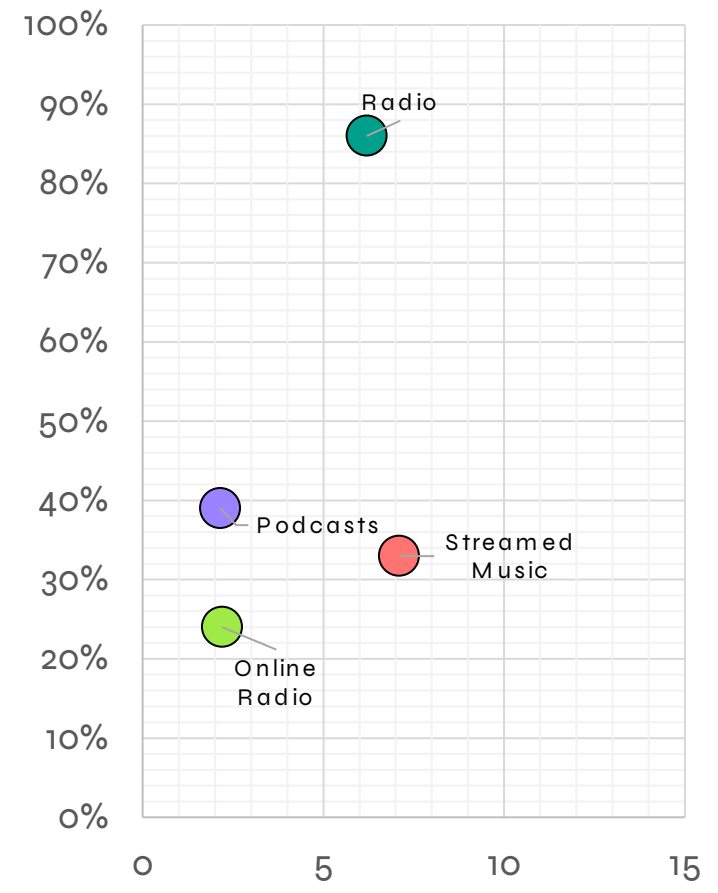
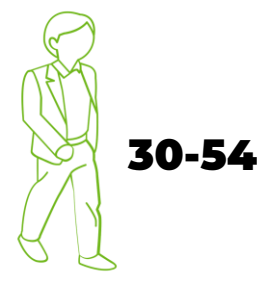
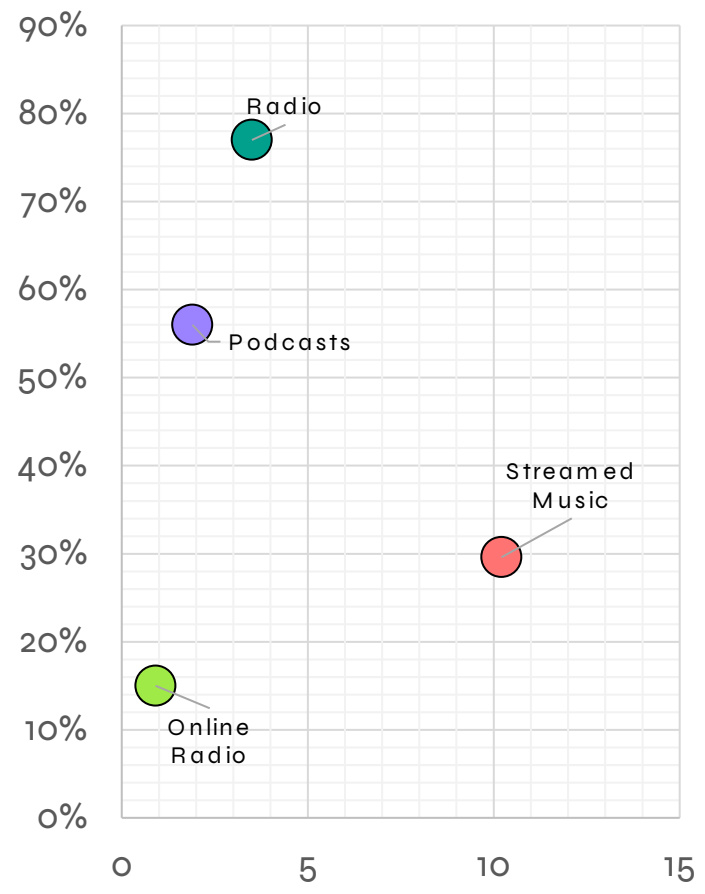
### 30-54

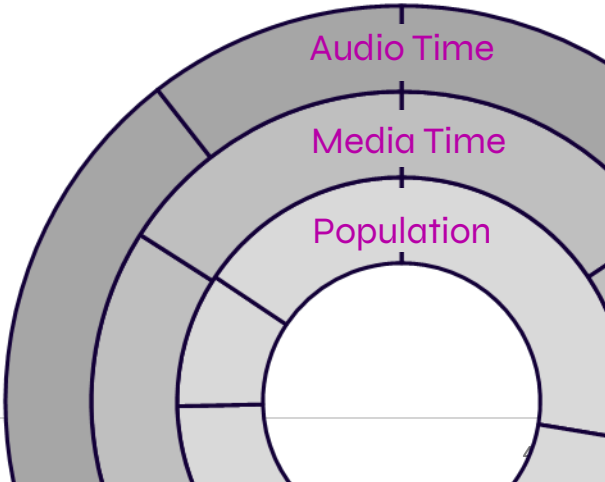
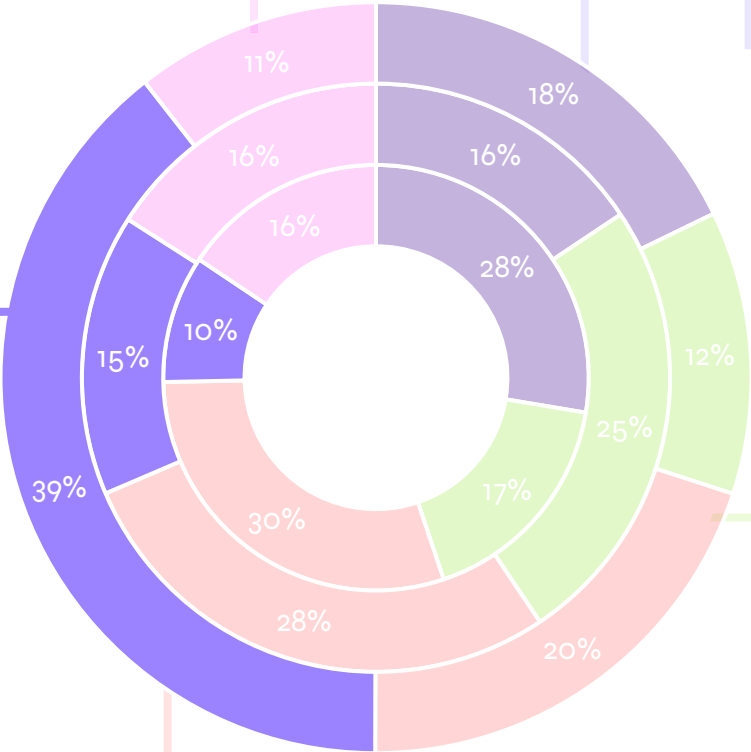
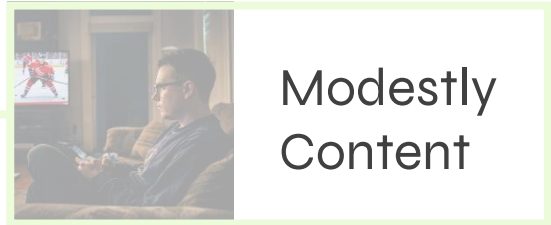
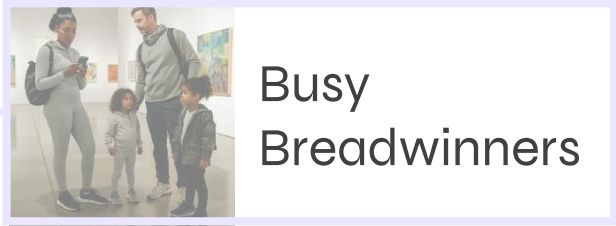
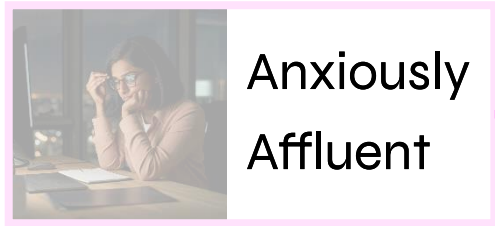


### 55+





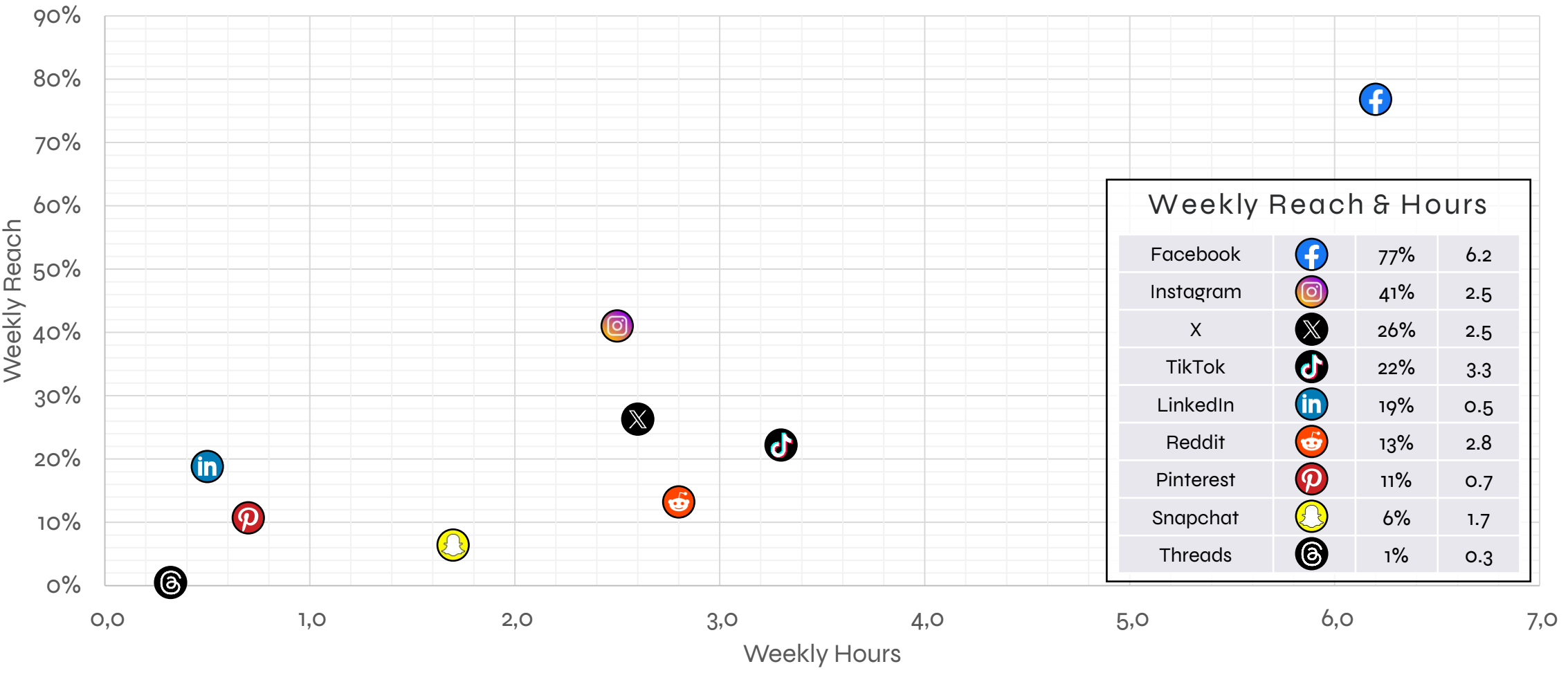




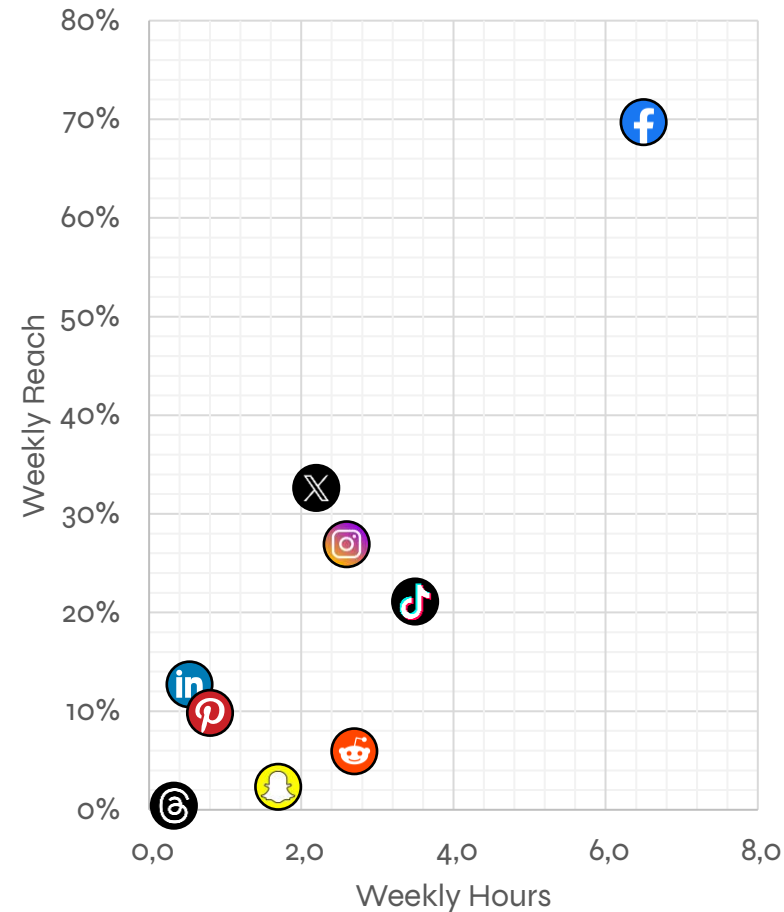
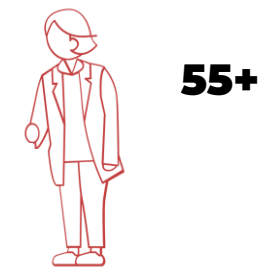
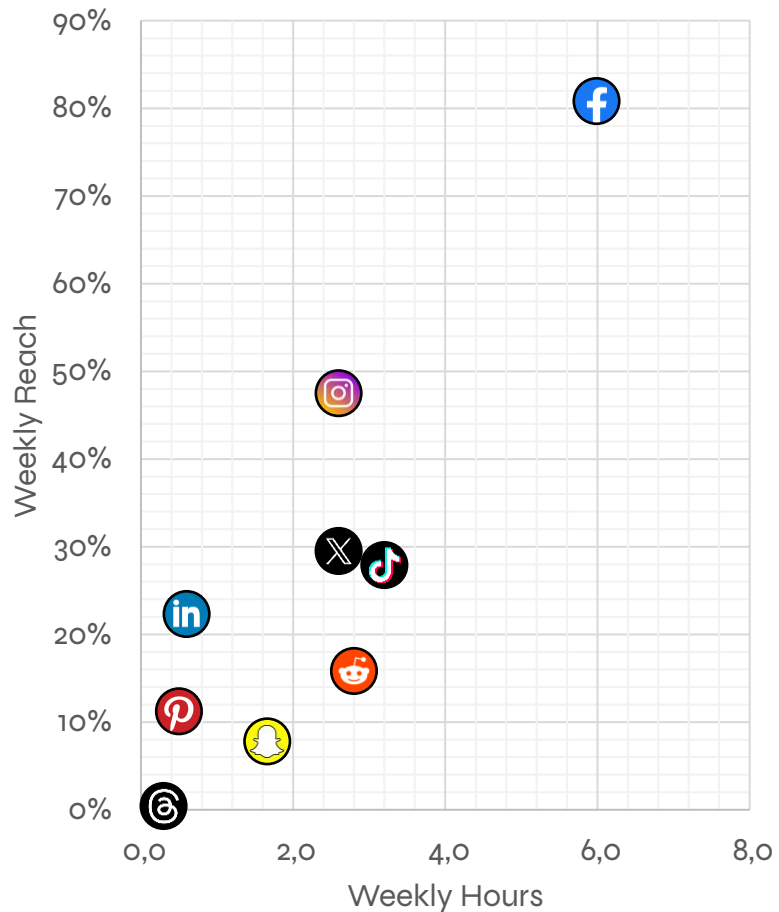
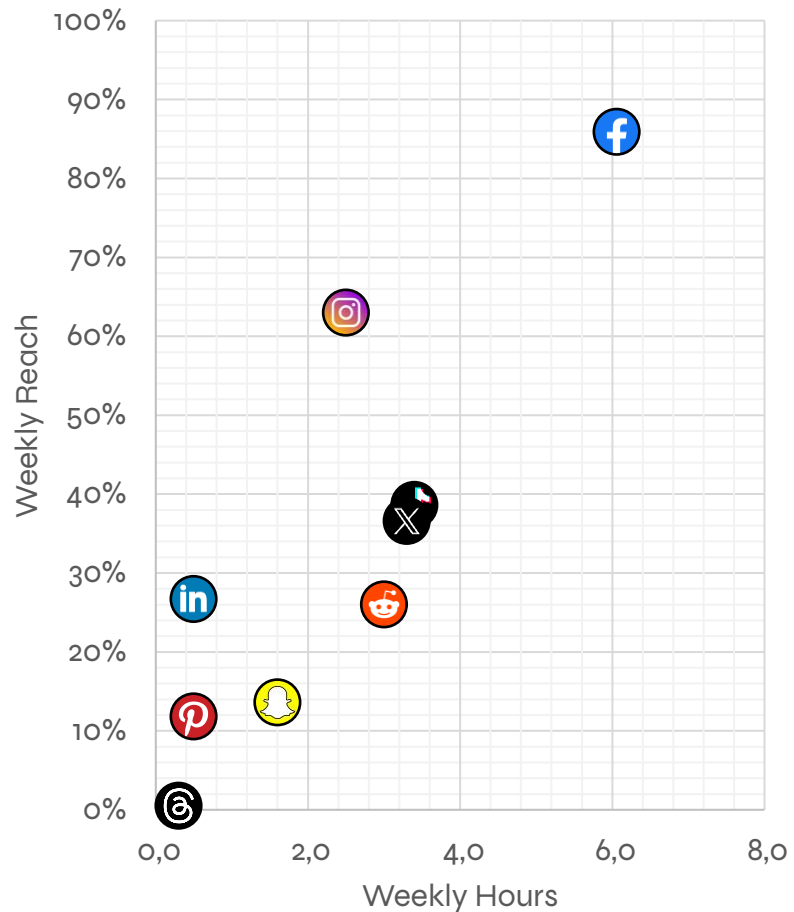
# Social Media





















# Meta Dominates Social Media Reach & Time




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




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

									
		51%	32%	27%	24%	16%	13%	8%	0%
	96%		43%	40%	32%	22%	16%	13%	1%
	93%	67%		38%	36%	28%	12%	13%	1%
	94%	73%	45%		28%	28%	15%	15%	1%
	97%	70%	51%	33%		29%	16%	10%	1%
	93%	68%	56%	47%	41%		11%	13%	2%
	91%	62%	29%	31%	28%	13%		9%	1%
	96%	84%	52%	51%	30%	27%	9%		0%
	95%	79%	65%	40%	30%	38%	9%	5%	

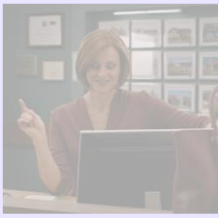
Source: PHD estimates from multiple industry sources, Vividata Metrica, Quebec



**Anxiously  
Affluent**




**Busy  
Breadwinners**



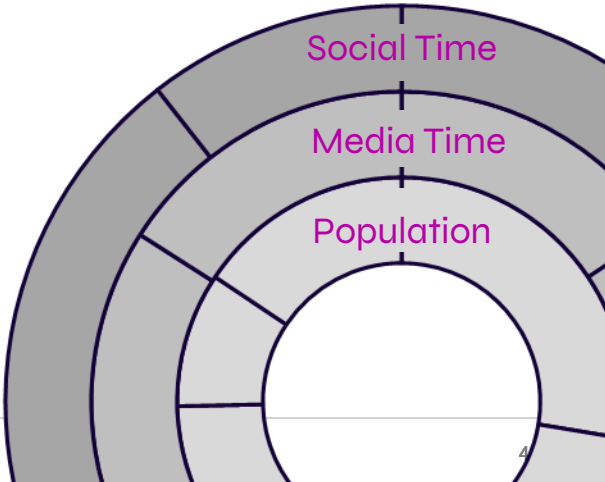
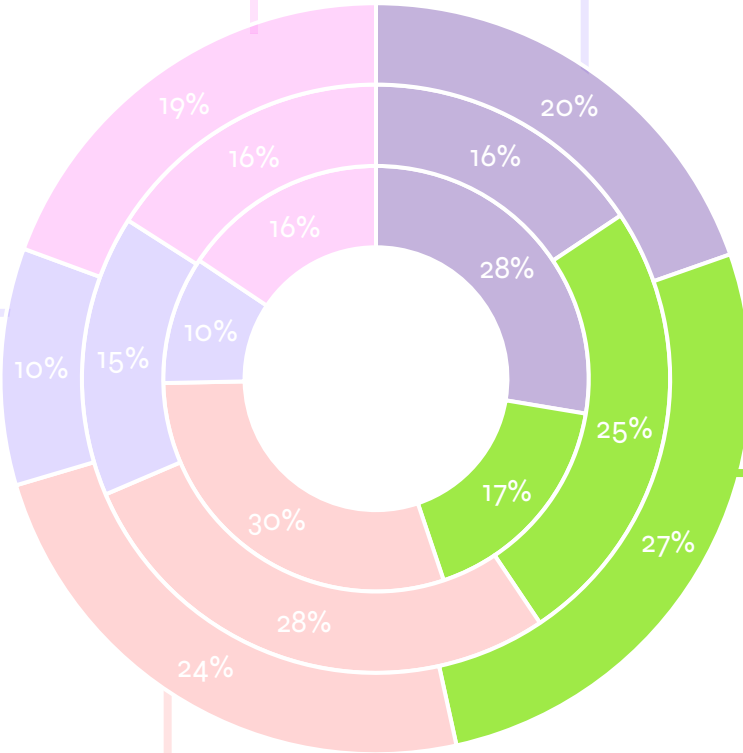
**Musically  
Happy**



**Modestly  
Content**



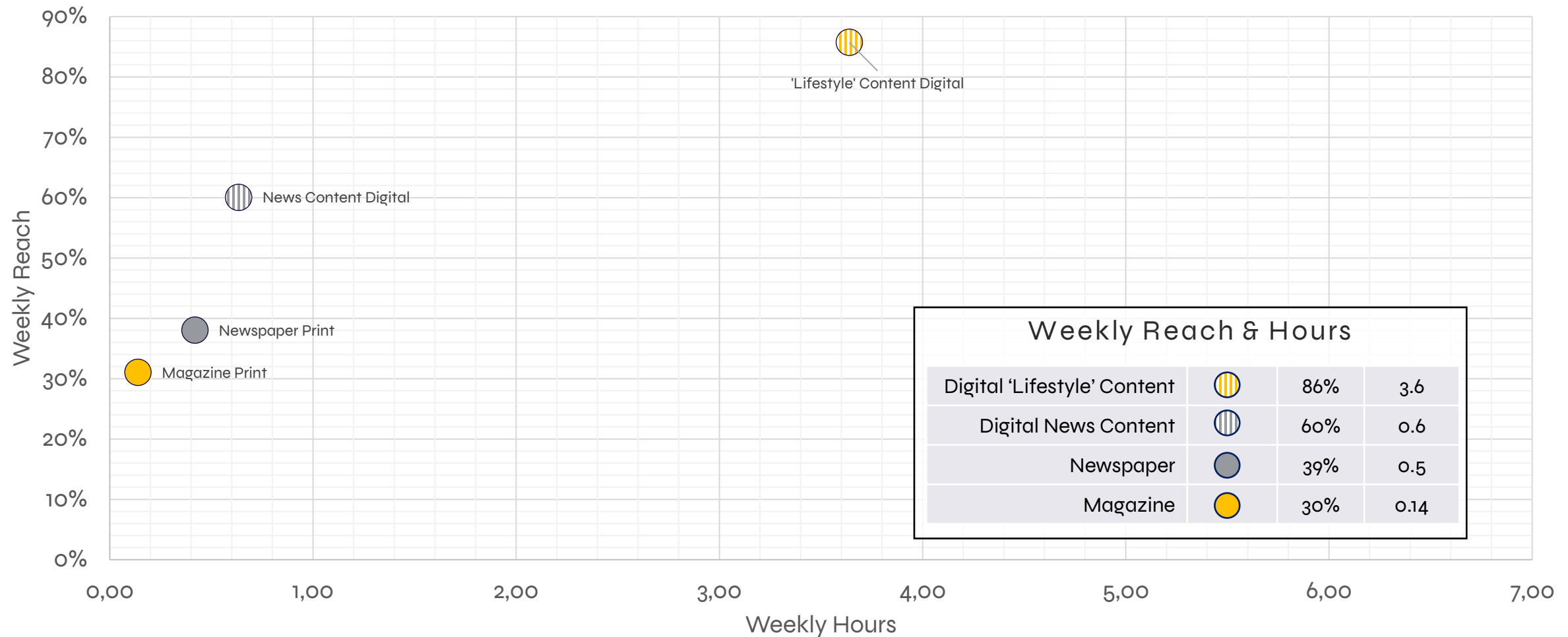
**Relaxed  
Retirees**



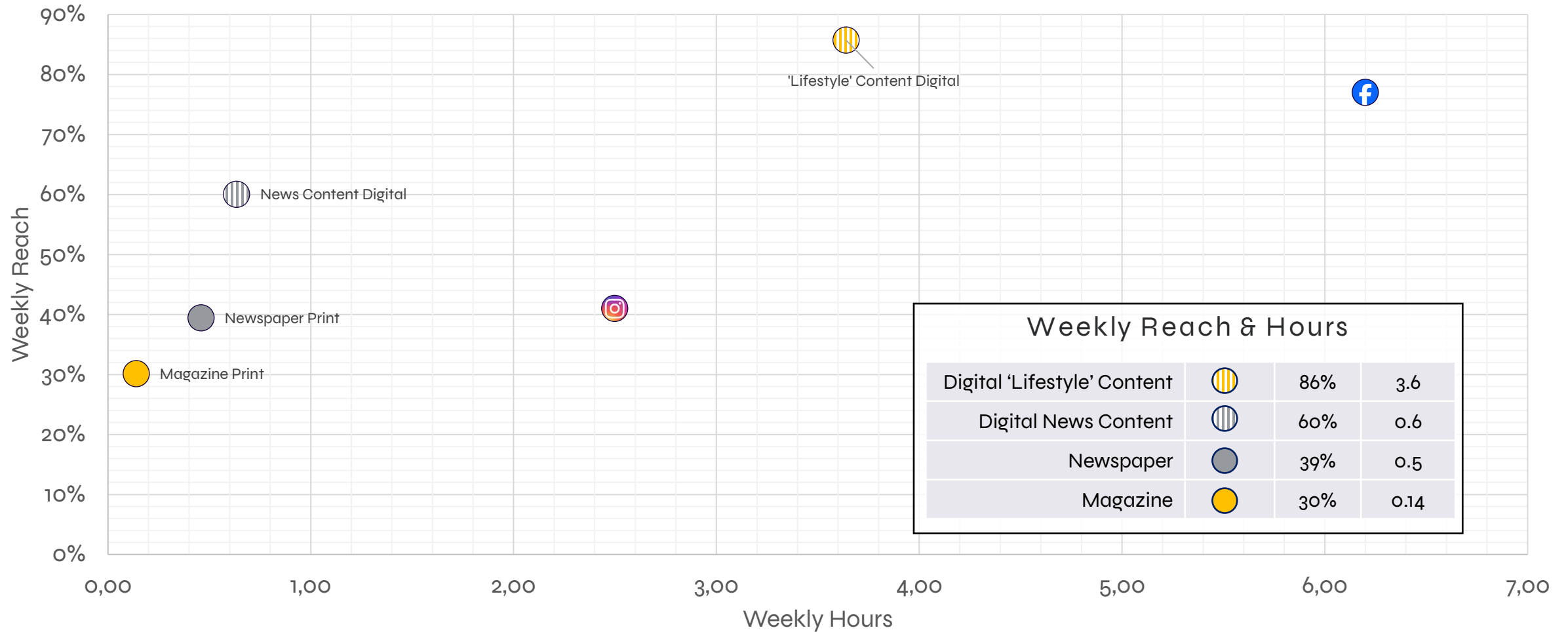


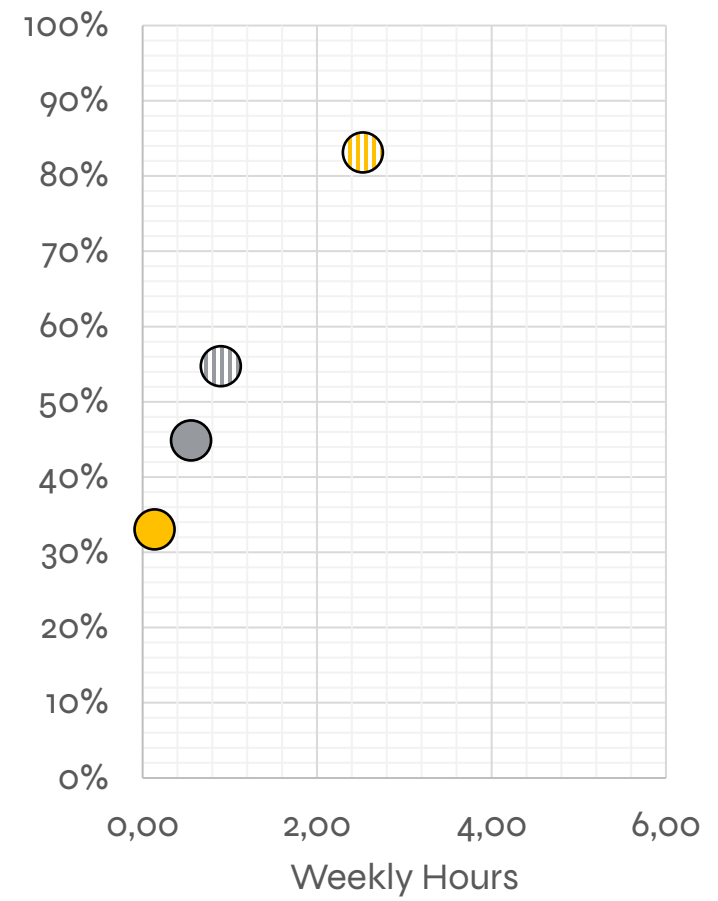
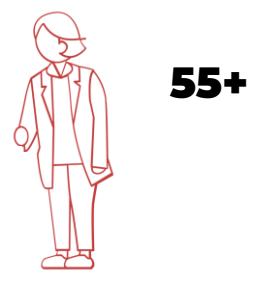
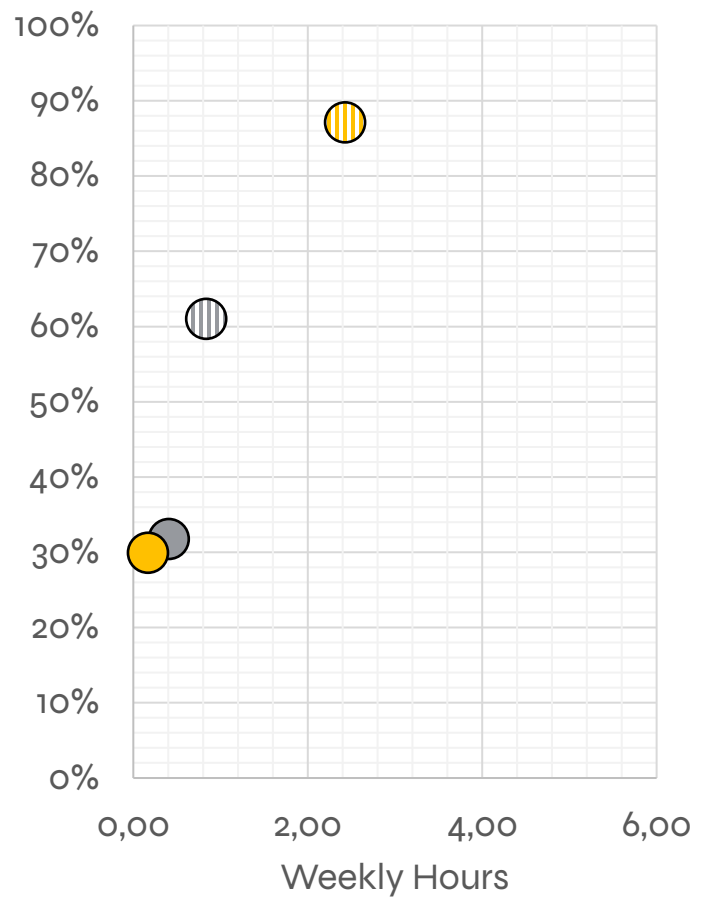
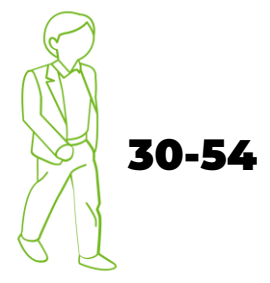
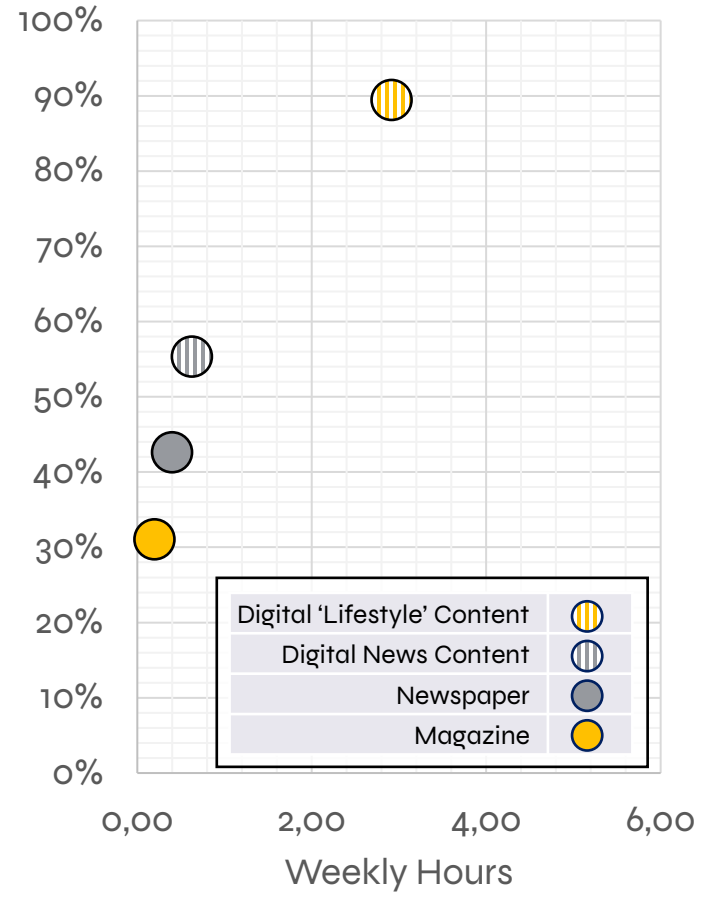
# News & Content

# Digital News & Content Dramatically Extends Print Reach & Time



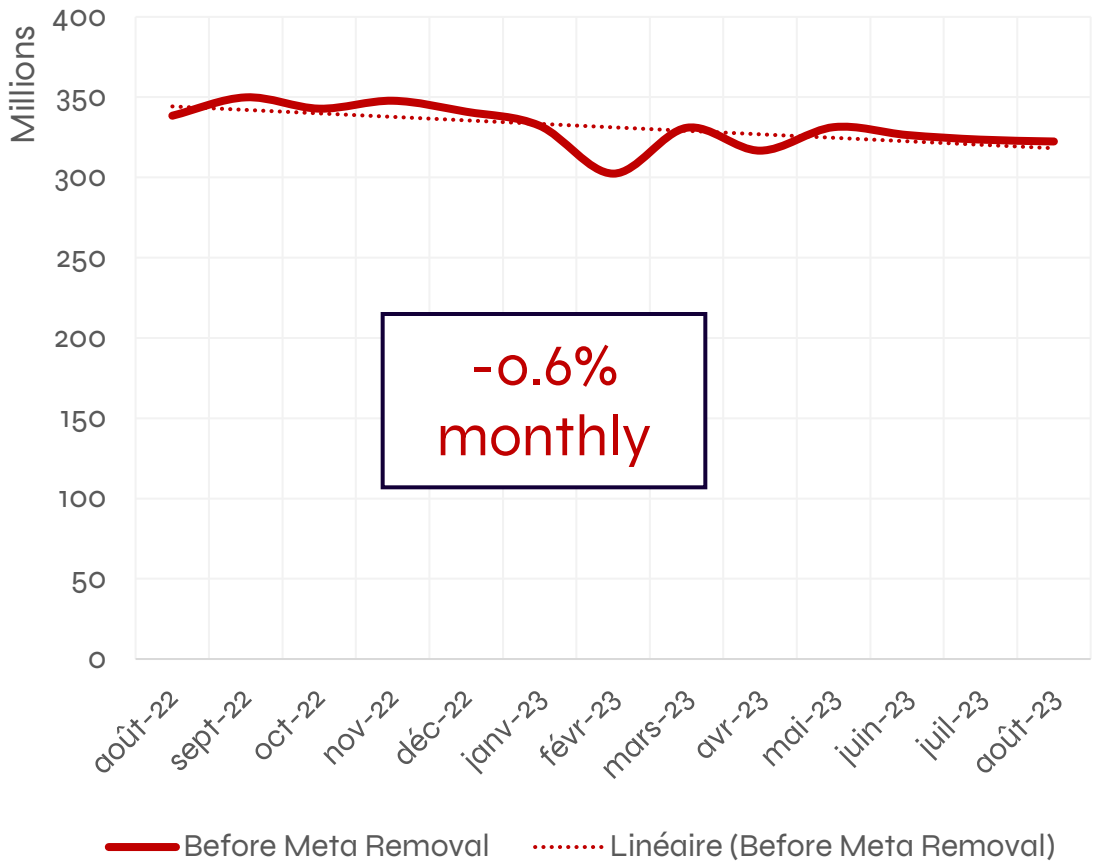
## News & Content have comparable reach but less than time than leading socials



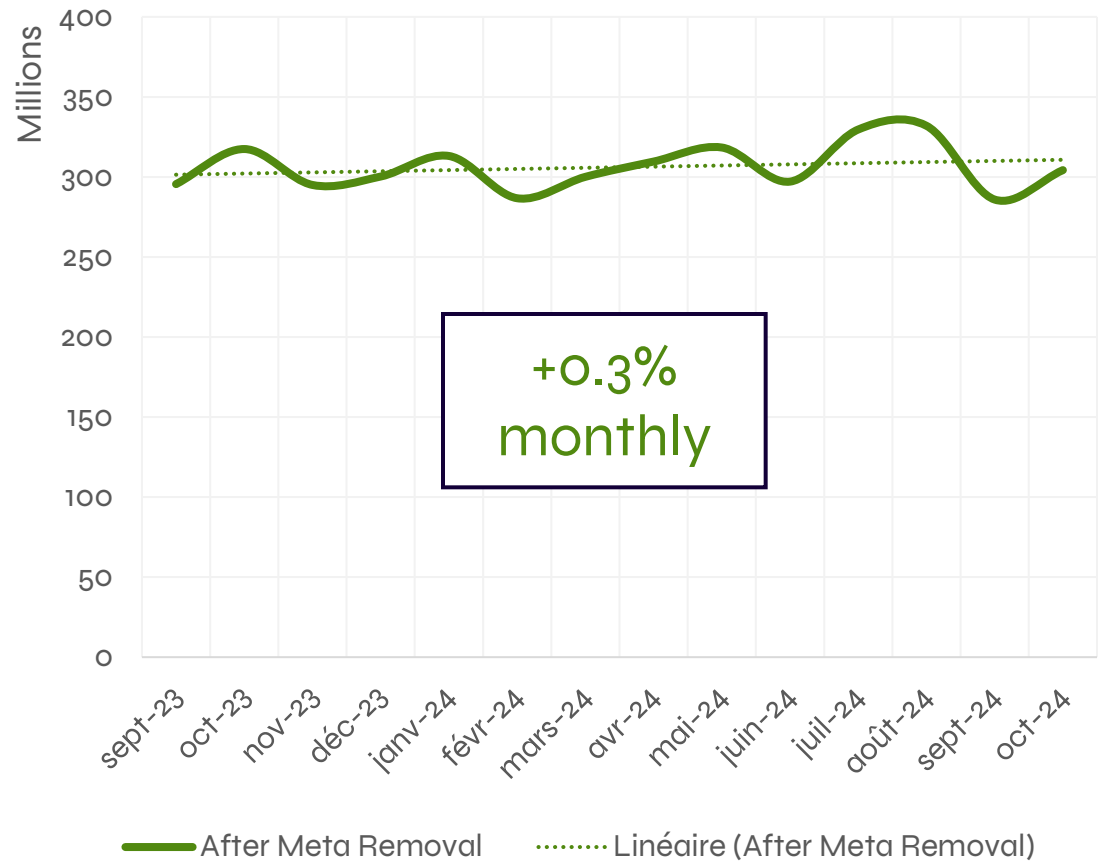


# News Consumption Appears to have Stabilized Post Meta Removal

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

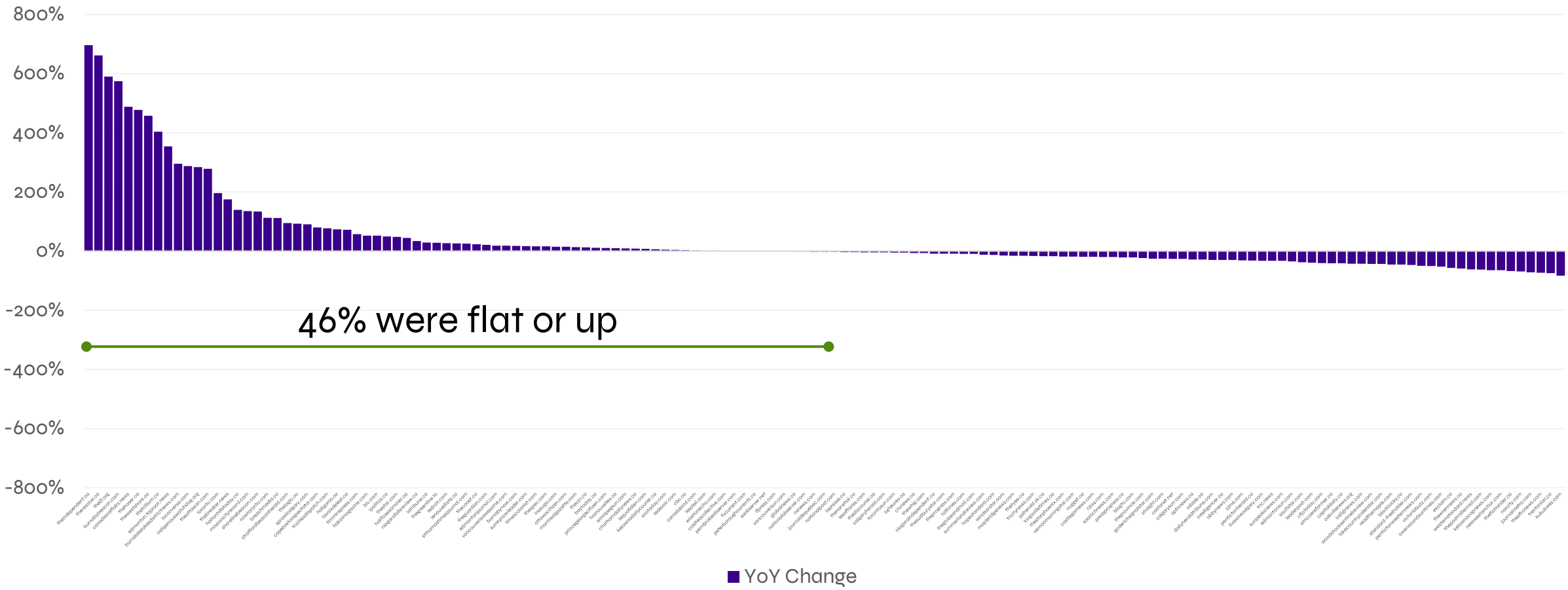


After Meta Removal:  
Monthly Visits of 150 News Sites in Canada




# Not all News Providers are Performing Equally


## August, September, October vs the Same Period Last Year



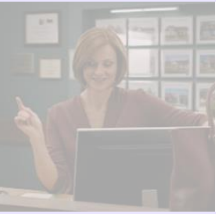
46% were flat or up



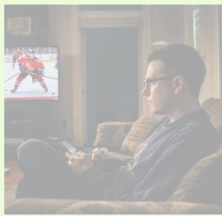
**Anxiously  
Affluent**




**Busy  
Breadwinners**



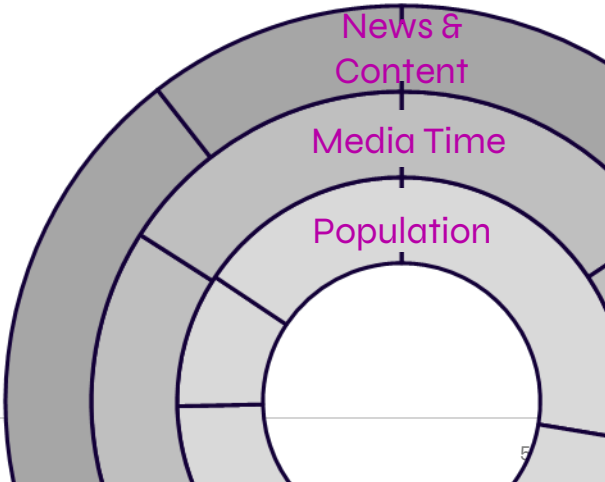
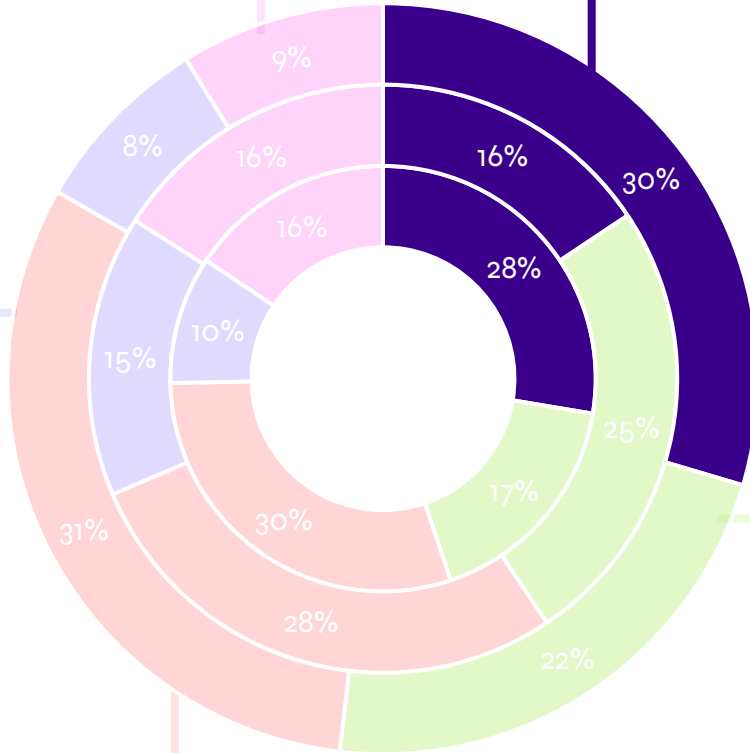
**Musically  
Happy**



**Modestly  
Content**



**Relaxed  
Retirees**

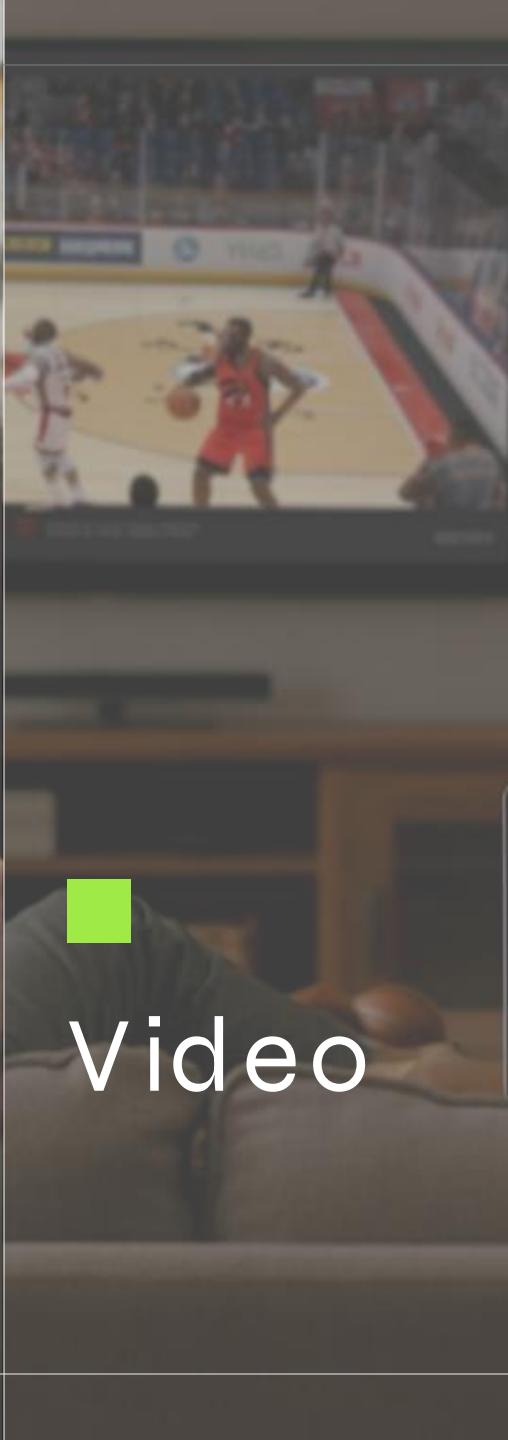


# Growth

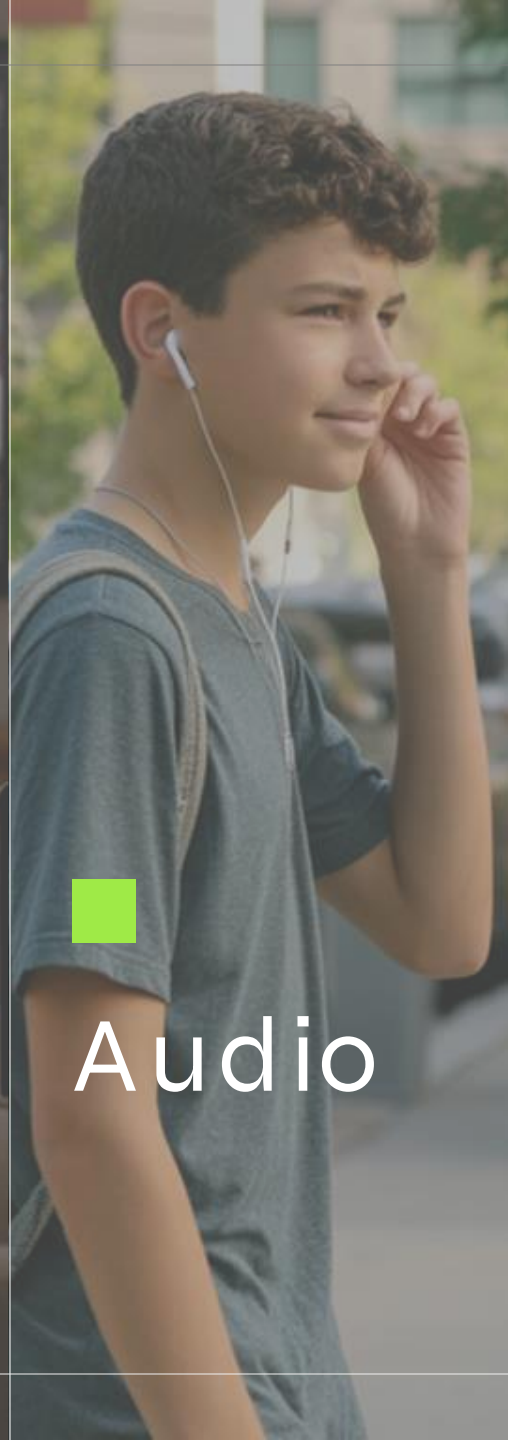




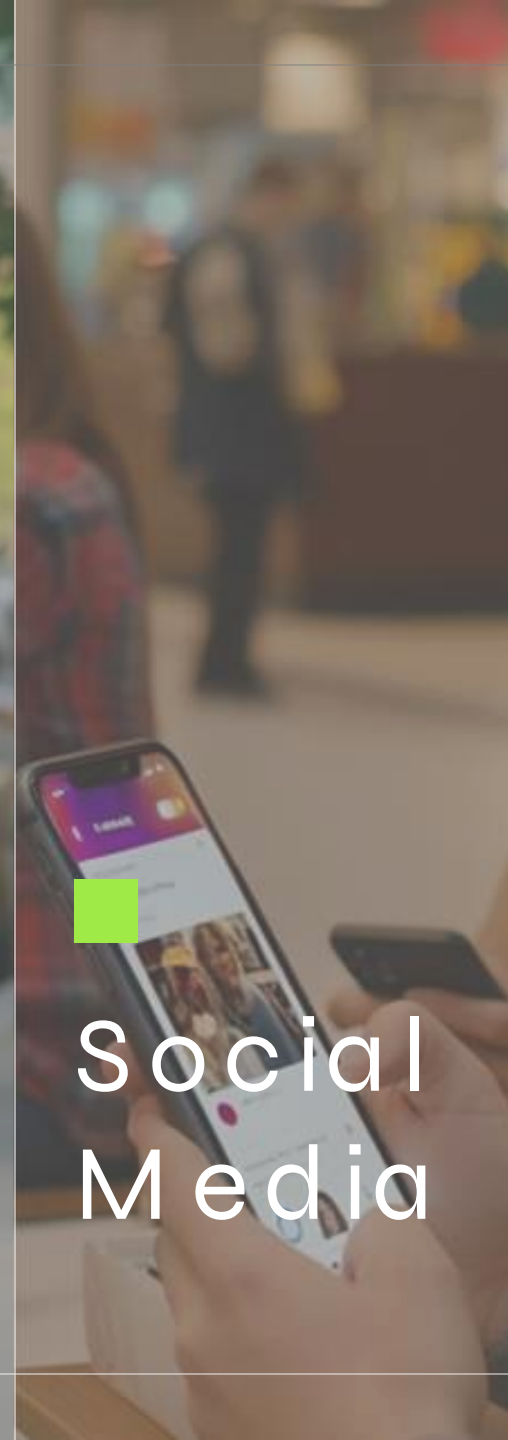
Retail  
Media



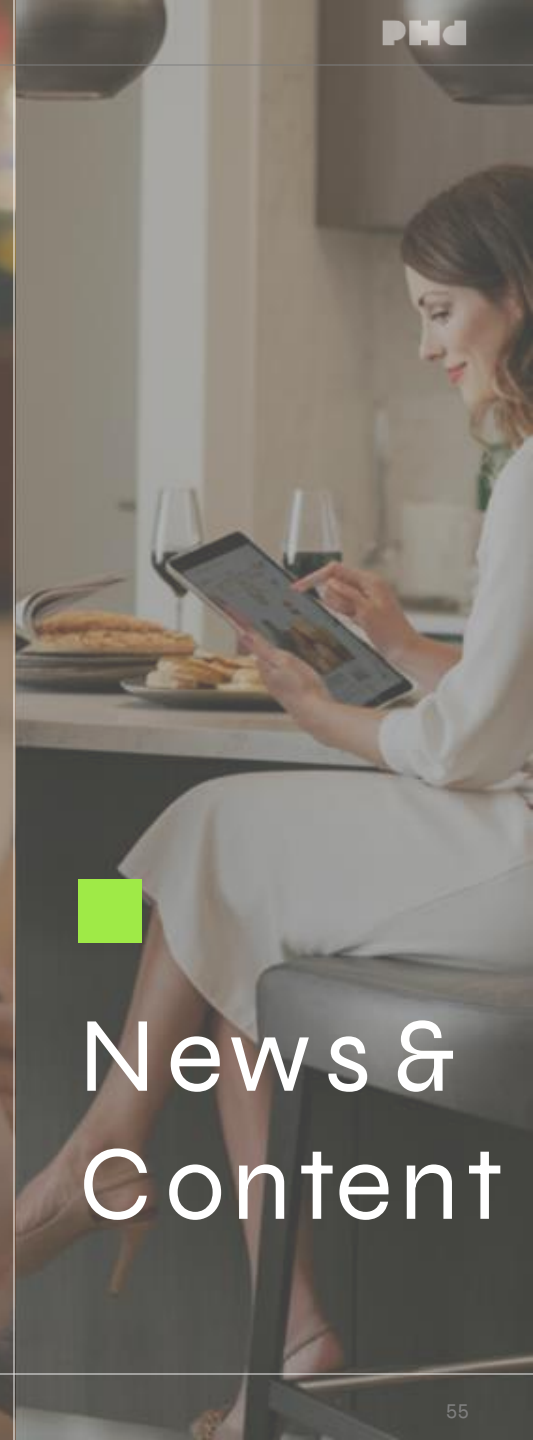
Video



Audio



Social  
Media



News &  
Content

## The Implications: Overall



More digital media = more diversified experiences in digital



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



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



News & Content doesn't get the credit it deserves



We should probably all listen to more music

## The Implications: Advertisers & Agencies



Stay ahead  
of the shift  
to Retail  
Media



Get to know  
your market  
beyond the  
platforms



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



Win like a  
big brand:  
investing  
consistently  
and  
patiently



Measure the  
short, and  
the long

## The Implications: Media Owners & Sellers



Stay ahead of the shift to Retail Media



Get to know your market beyond the platforms



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



Make it easier for buyers to *value* your offering



Measure the short, and the long