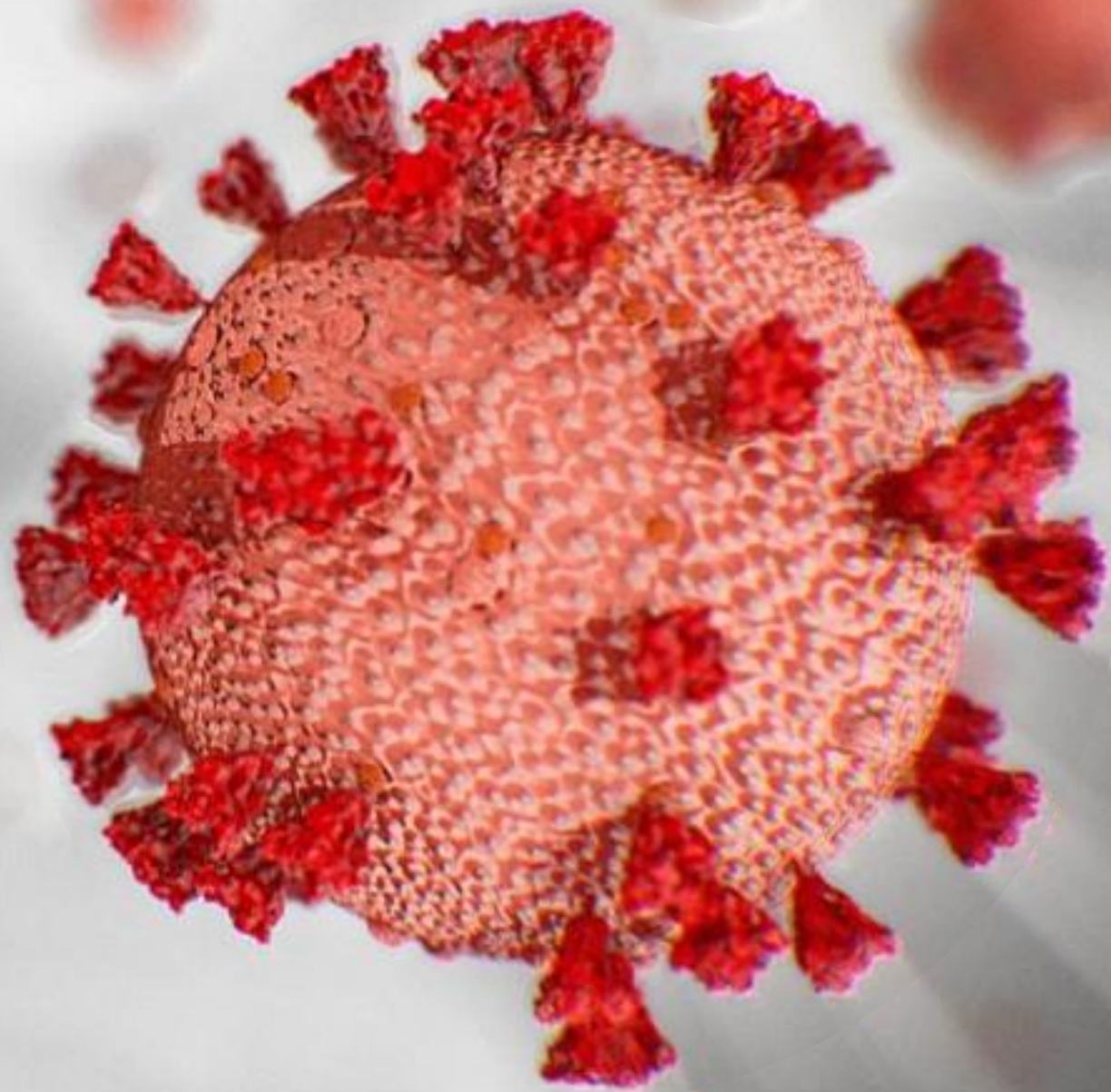
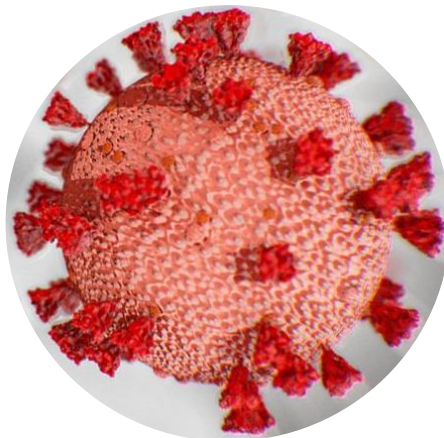




Canadian
Media
Usage
STudy

2020



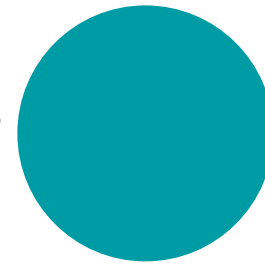
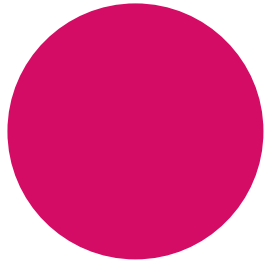






Classical Plot

Shane, 1953

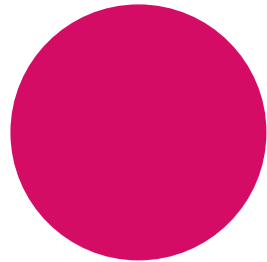






Classical Plot

Shane, 1953



Lone Hero, 'lowly' status

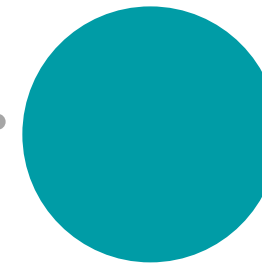
Protects the community

Morally good



Professional Plot

Magnificent Seven,
1960



Team of experts

Compete with the villains

Morally ambivalent





**We need popular content
more than we realize**



**Knowing what is popular
matters**



**Content that connects with
culture is profitable**



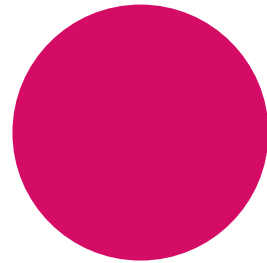
- Reach & Time
- Devices
- Video
- Audio
- eCommerce
- Money
- Implications





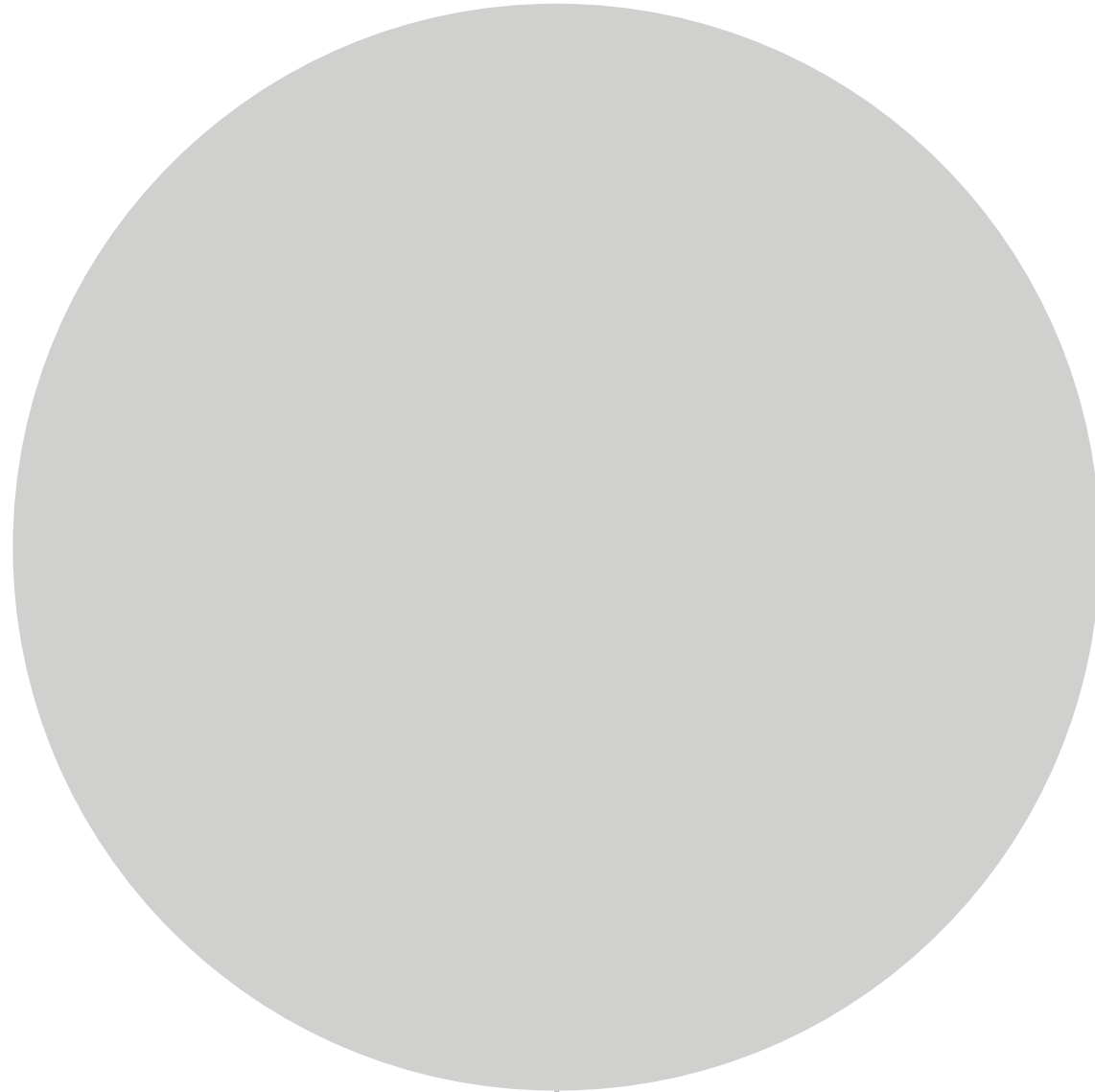
Top Grossing Film in Canada

Avengers: Endgame

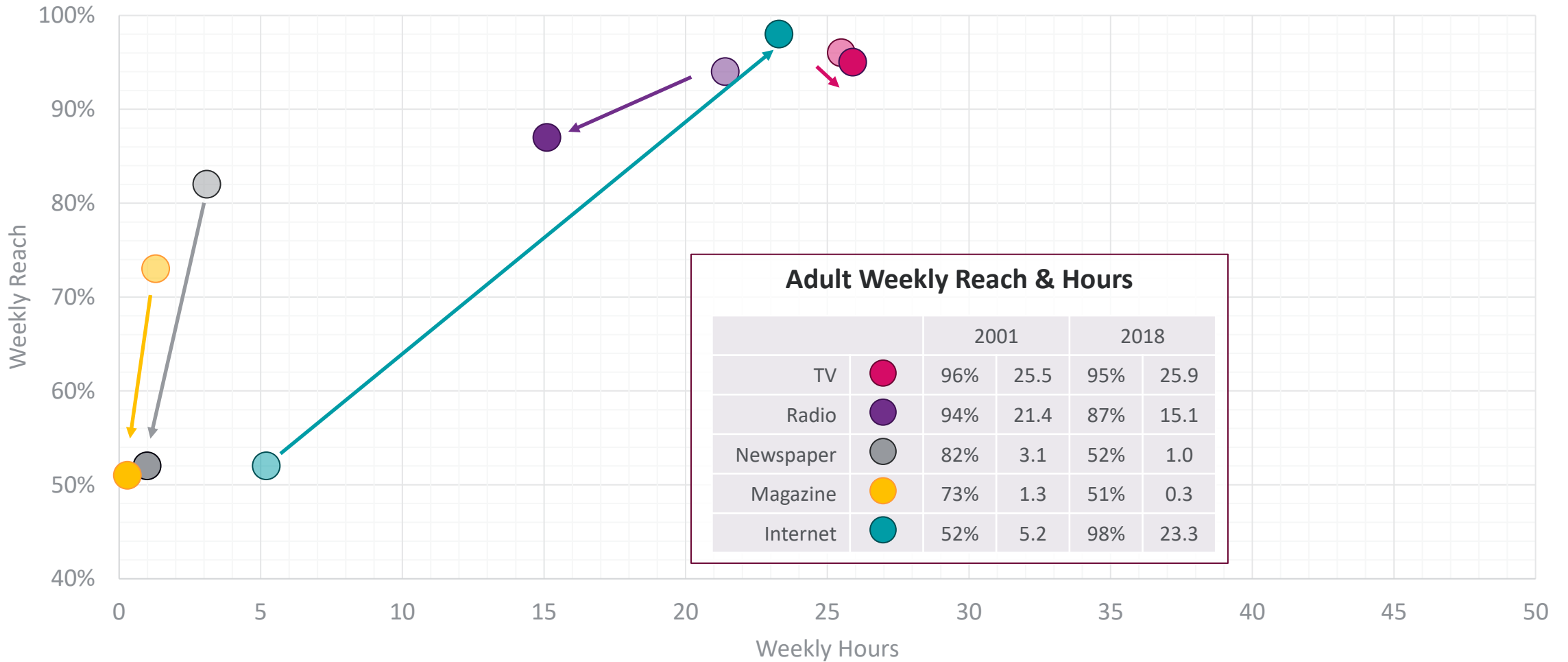




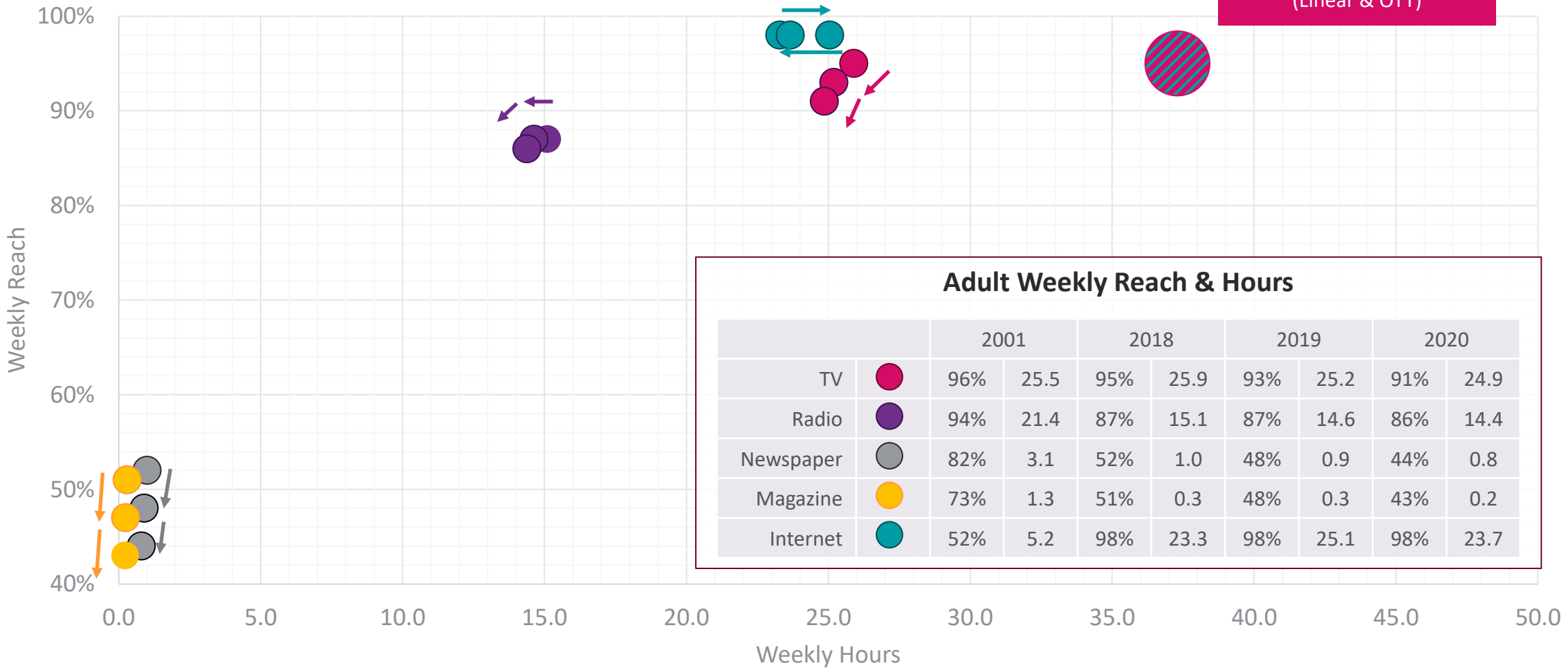
Reach & Time



Reach & Time



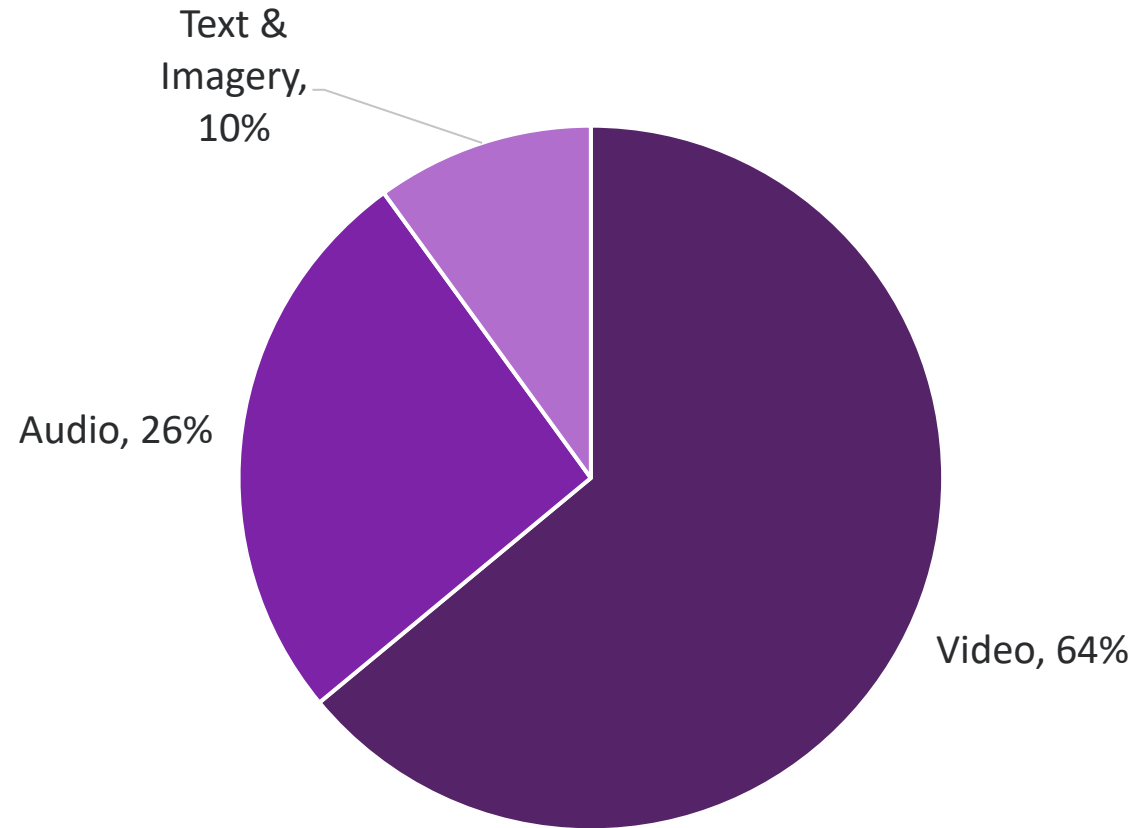
3 Year Trend



Total TV Estimate
(Linear & OTT)

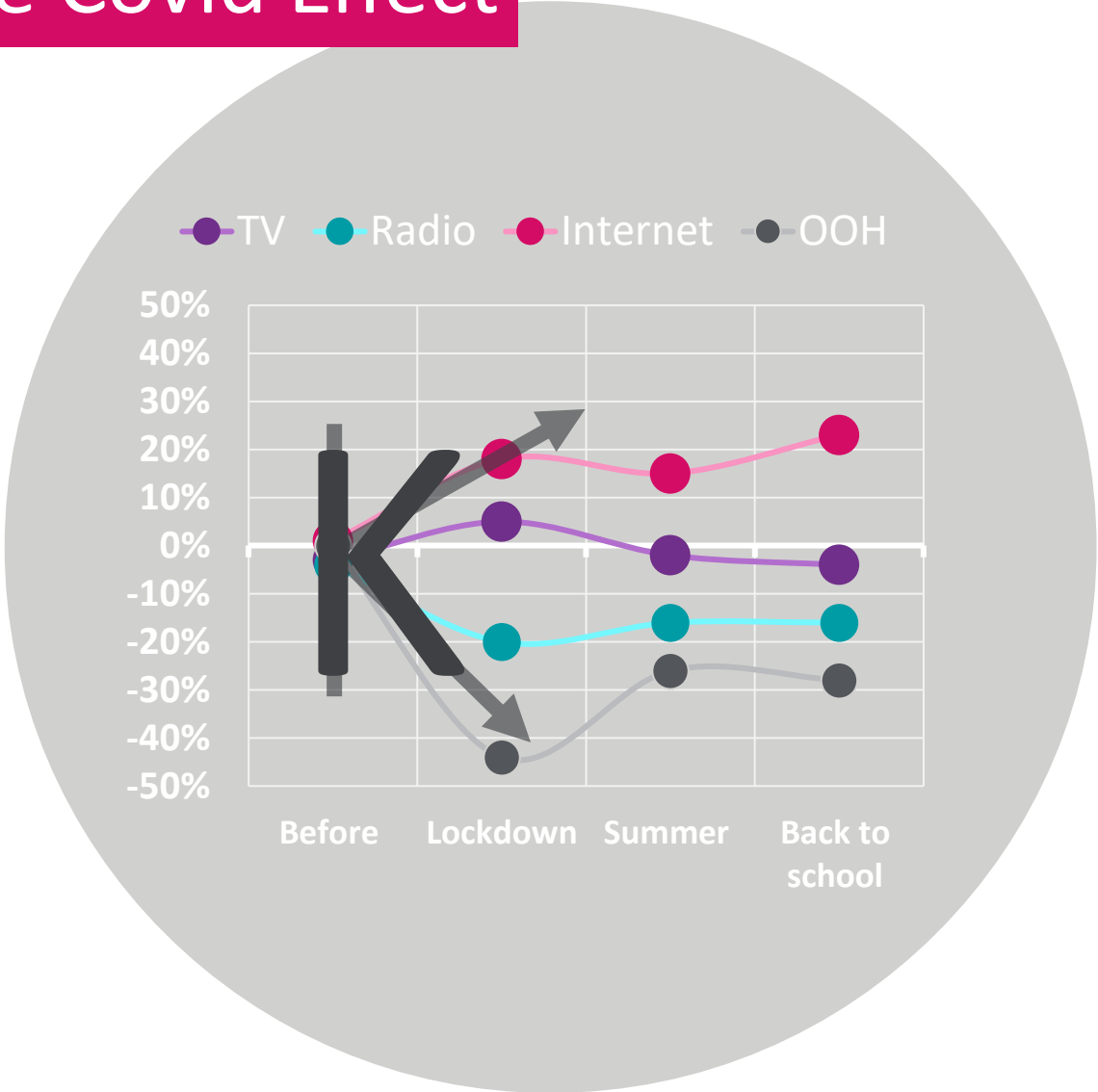
		2001		2018		2019		2020	
TV	●	96%	25.5	95%	25.9	93%	25.2	91%	24.9
Radio	●	94%	21.4	87%	15.1	87%	14.6	86%	14.4
Newspaper	●	82%	3.1	52%	1.0	48%	0.9	44%	0.8
Magazine	●	73%	1.3	51%	0.3	48%	0.3	43%	0.2
Internet	●	52%	5.2	98%	23.3	98%	25.1	98%	23.7

Share of Attention (A18+)






The Covid Effect







Momentum


Upward Momentum 

Downward Momentum 




 **General Internet**
+20% time

 **Overall Radio**
-16% time

 **Overall TV**
-4% time = 1 year of decline

 **Overall OOH**
-28% time

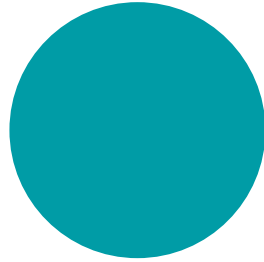
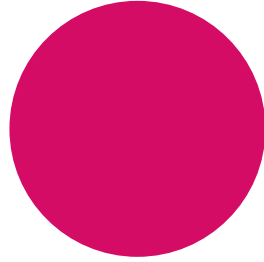


-  Likely a short-term trend
-  Likely a long-term trend
-  Likely to slow but continue





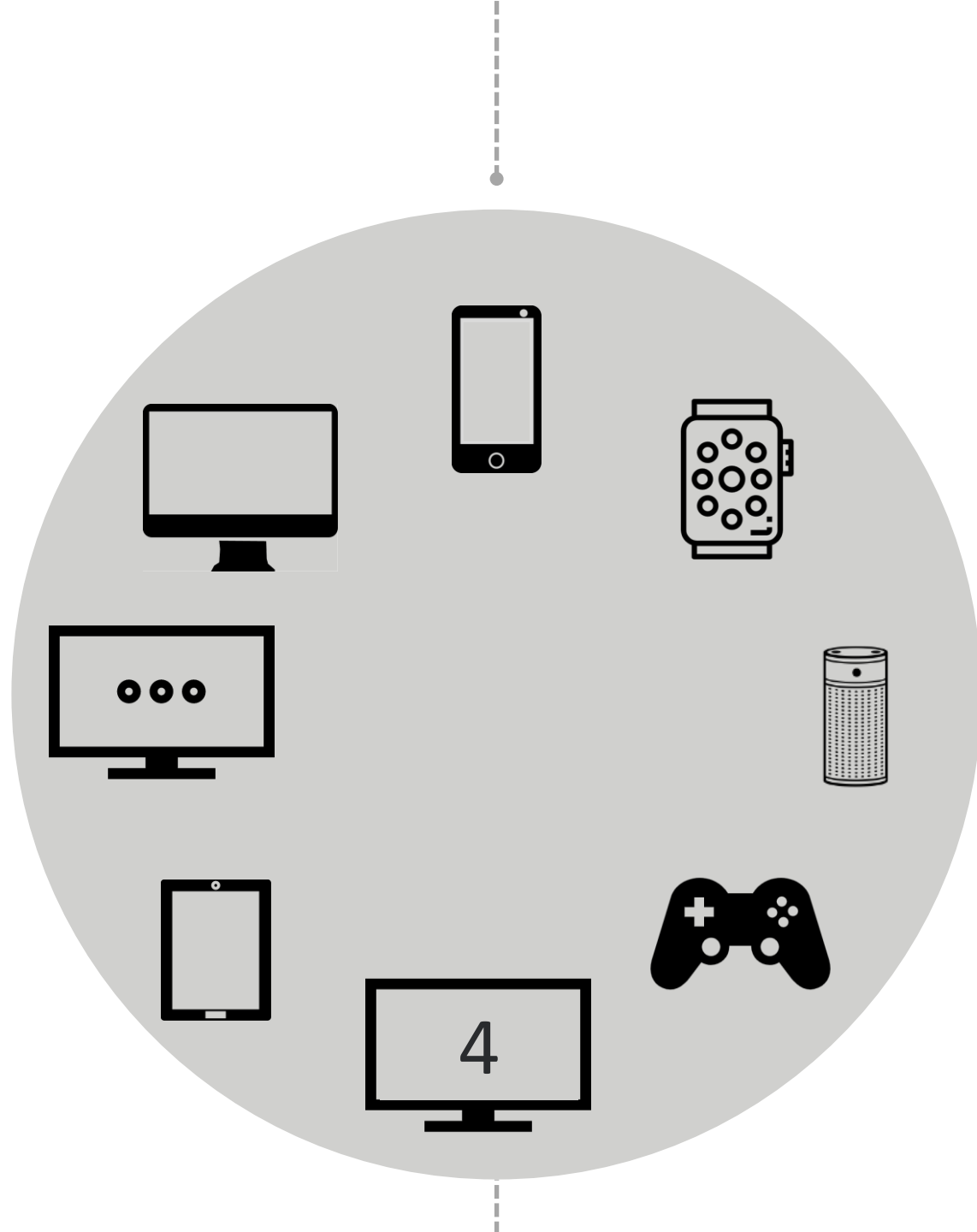
Channel-Disrupting



Election-Buzzing

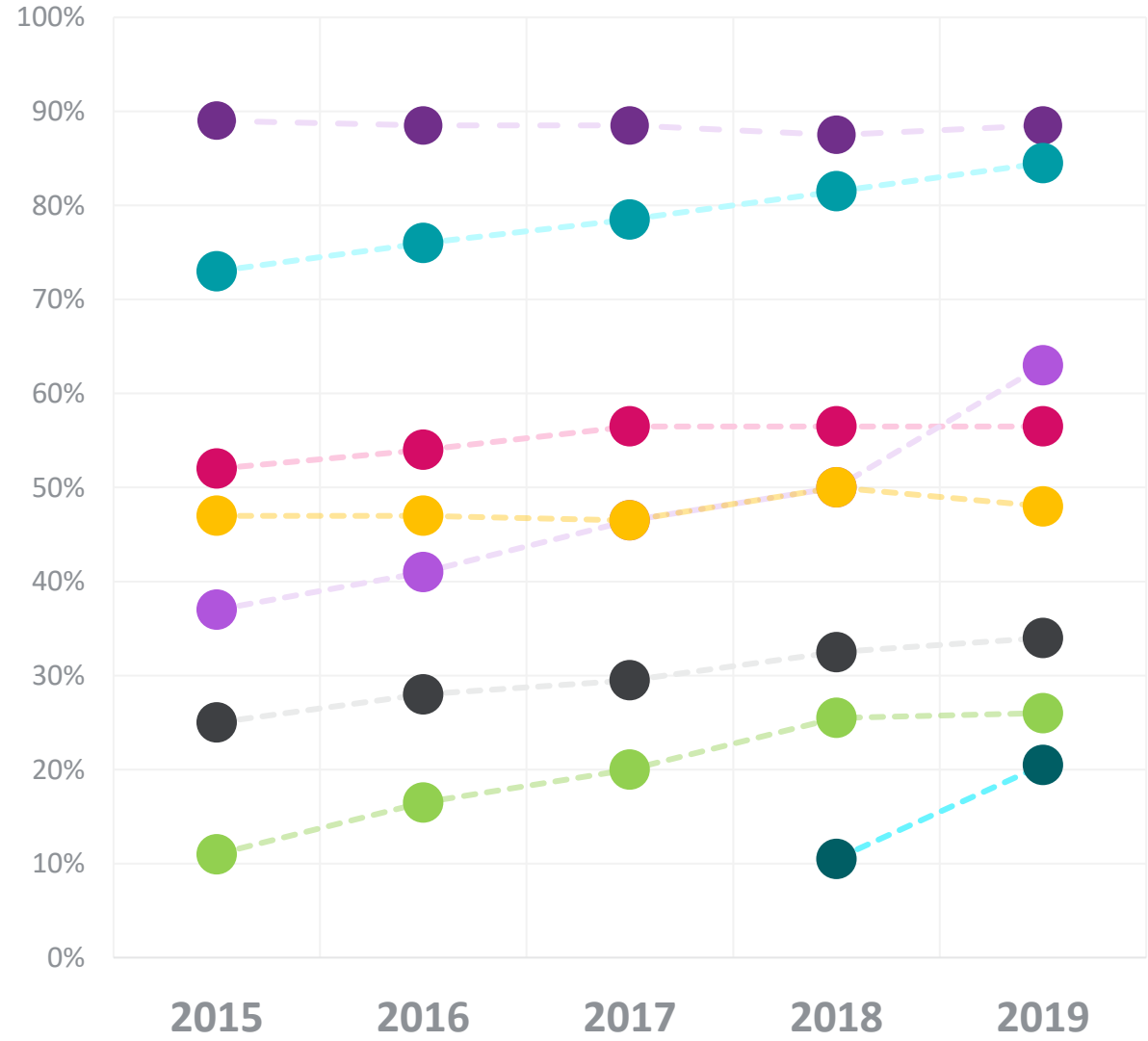


Devices

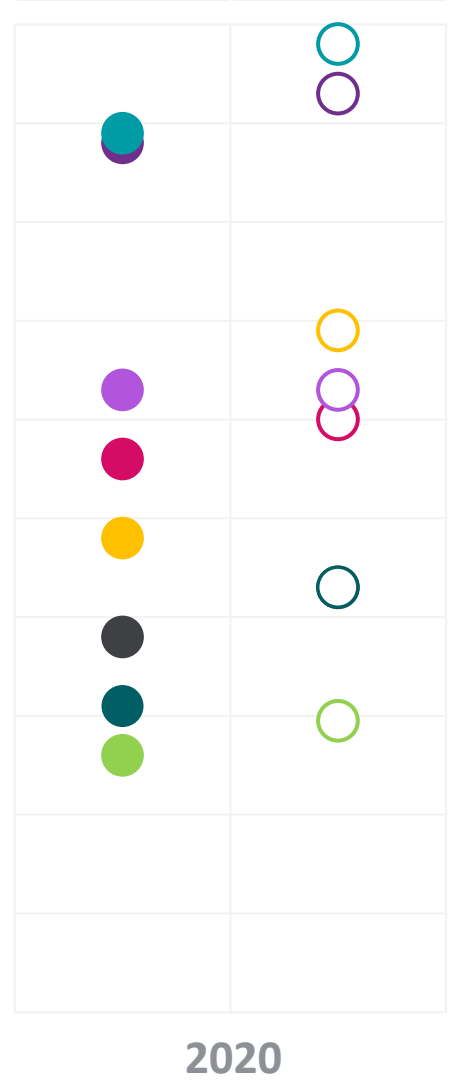




Adults 18+






A18+ | 18-34








Momentum




Upward Momentum

-  **General Internet**
+20% time
-  **Video Gaming**
+25% people increased time
-  **Virtual Classrooms**
+21% of households¹

Downward Momentum

-  **Overall Radio**
-16% time
-  **Overall TV**
-4% time = 1 year of decline
-  **Overall OOH**
-28% time



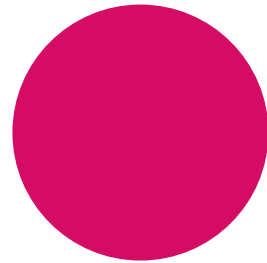
-  Likely a short-term trend
-  Likely a long-term trend
-  Likely to slow but continue





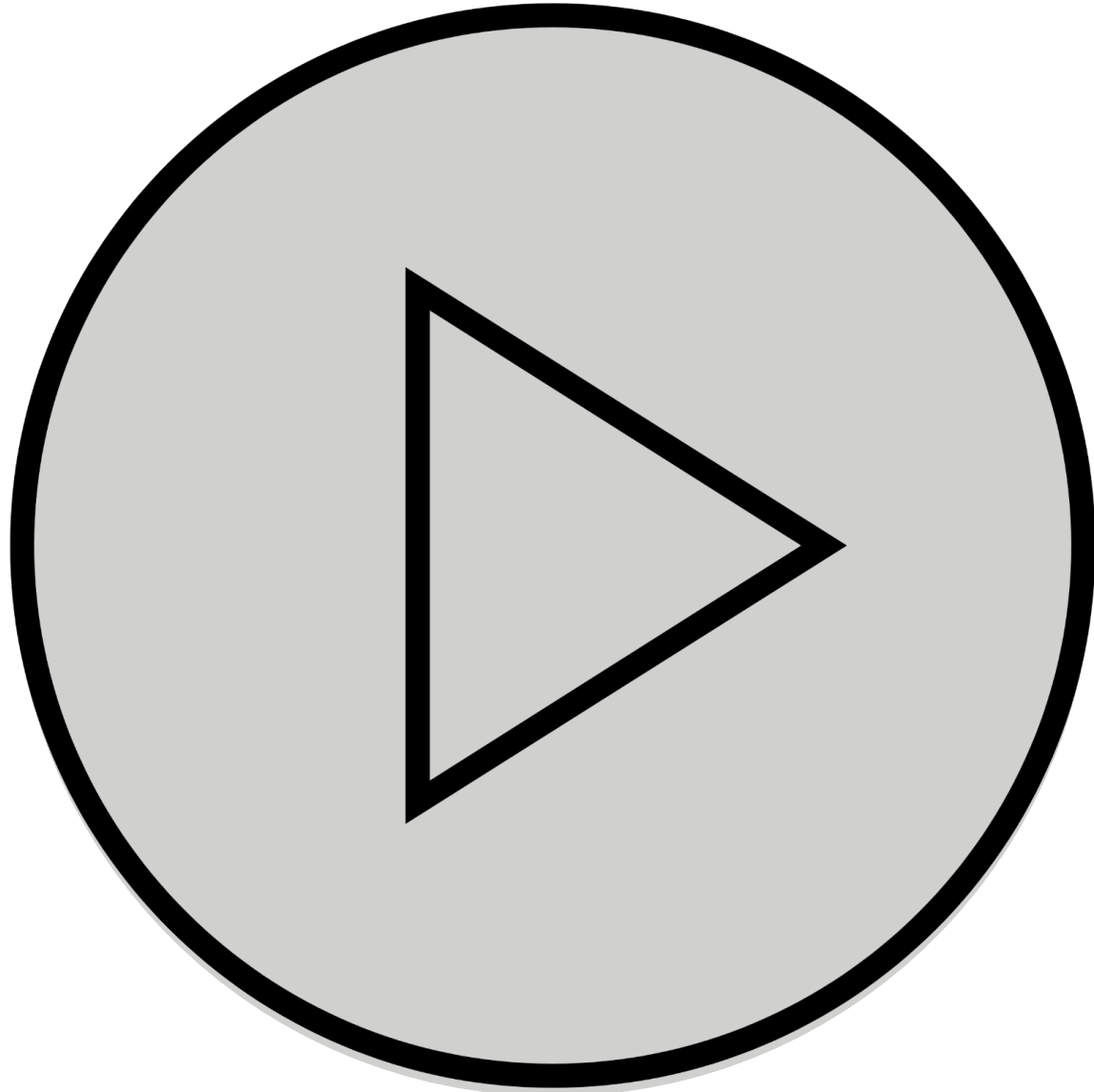
Top Rated Show in Canada

The Masked Singer



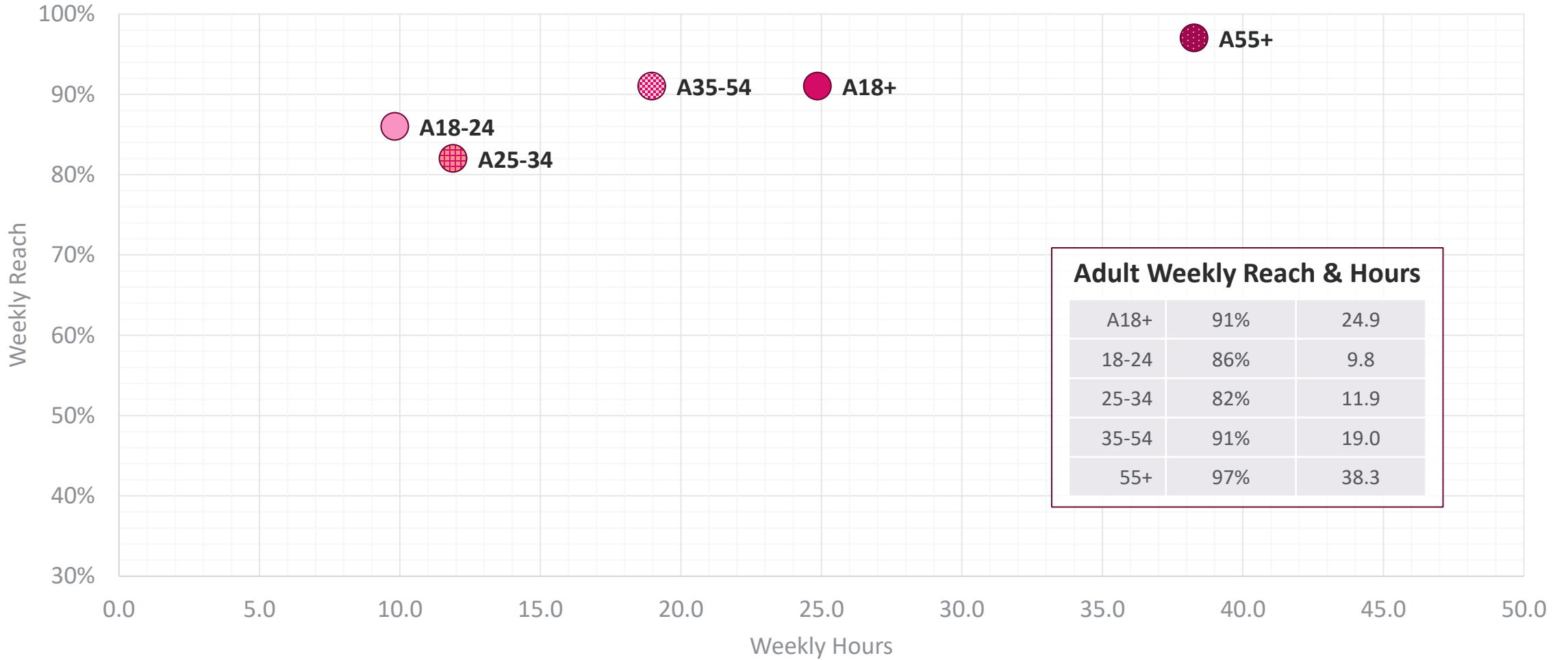


Video





Strong overall numbers – with a heavy skew to older Canadians

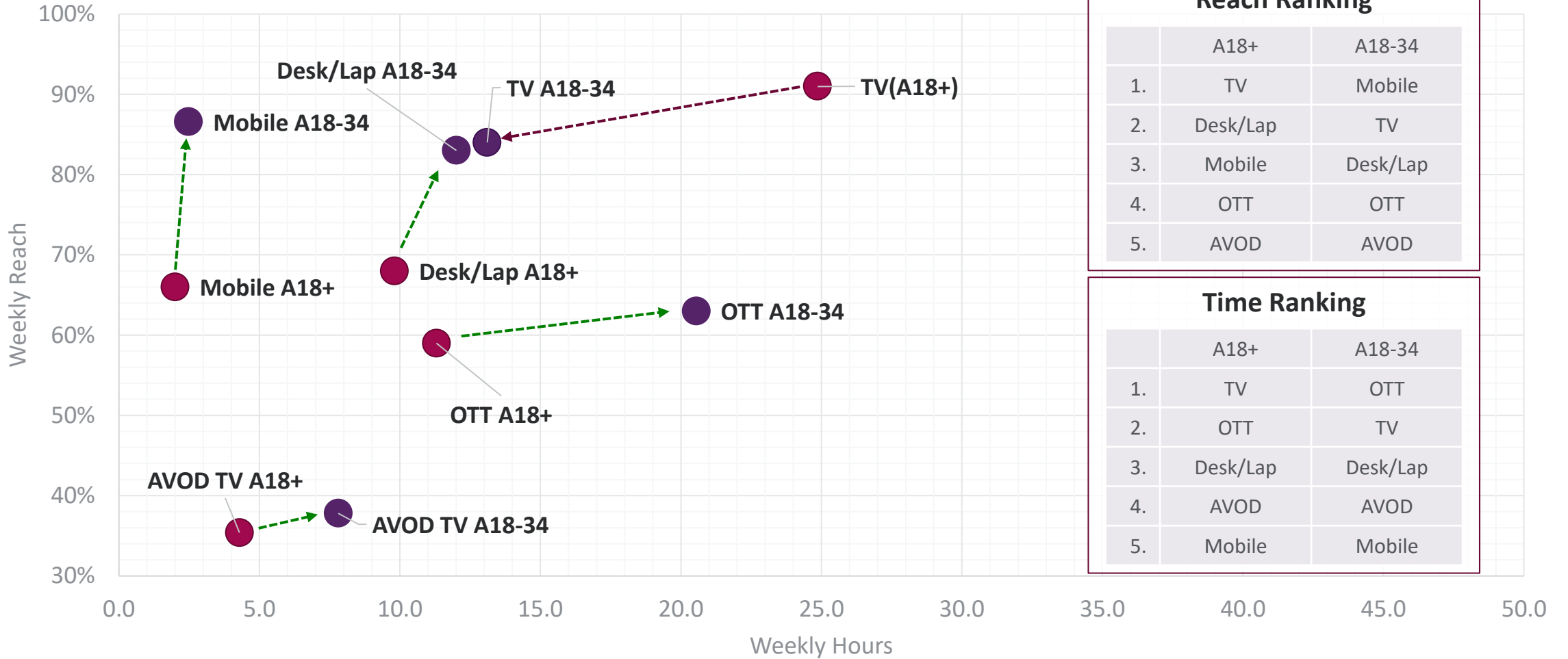


A18+	91%	24.9
18-24	86%	9.8
25-34	82%	11.9
35-54	91%	19.0
55+	97%	38.3



Video

Younger Canadians are heavy consumers of digital video in all its forms



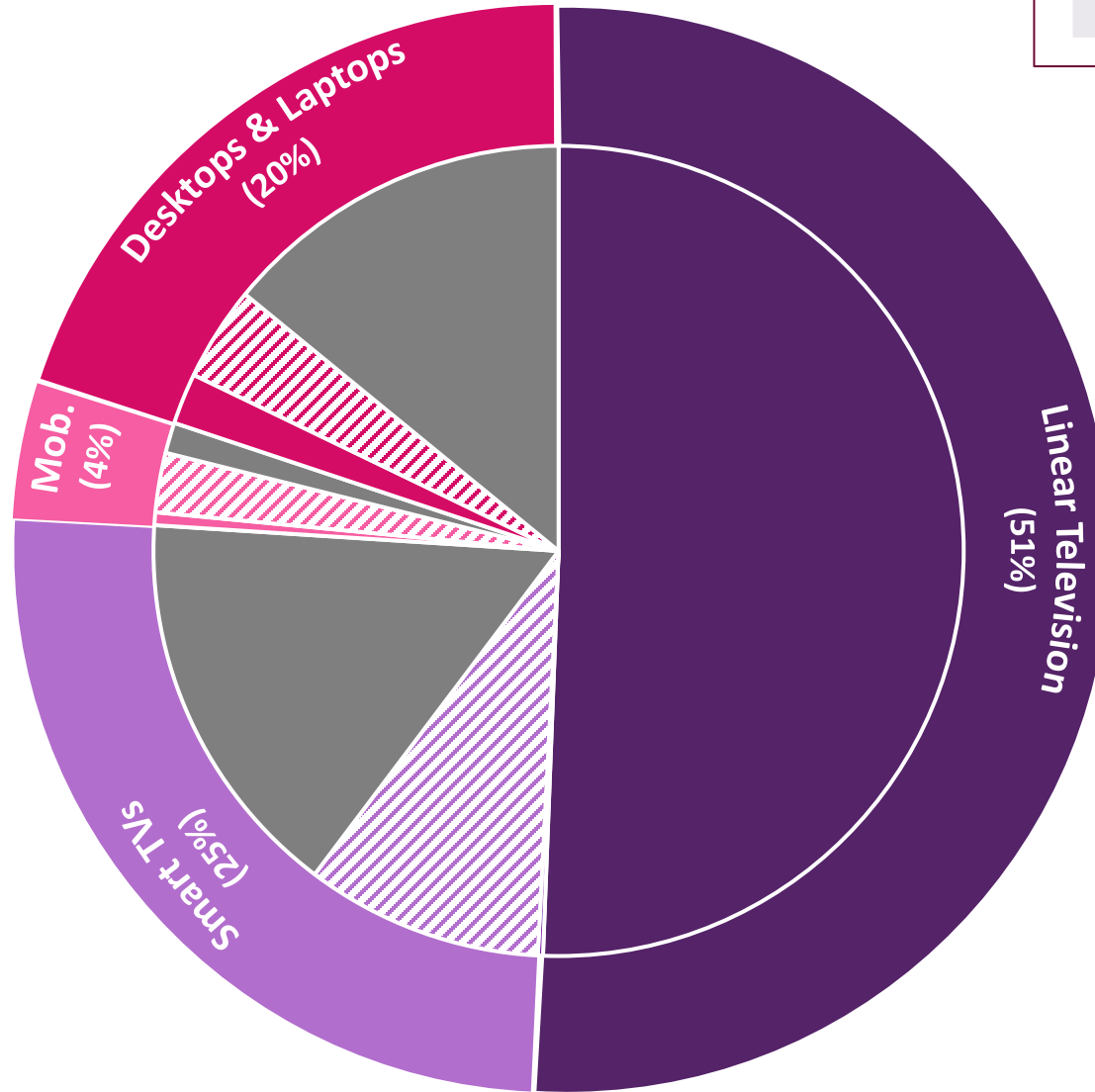
Reach Ranking

	A18+	A18-34
1.	TV	Mobile
2.	Desk/Lap	TV
3.	Mobile	Desk/Lap
4.	OTT	OTT
5.	AVOD	AVOD

Time Ranking

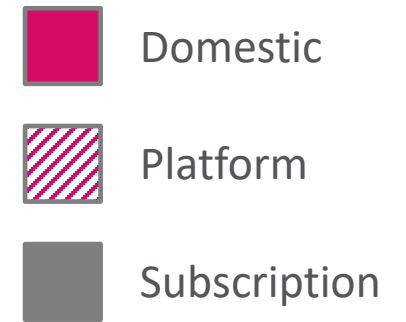
	A18+	A18-34
1.	TV	OTT
2.	OTT	TV
3.	Desk/Lap	Desk/Lap
4.	AVOD	AVOD
5.	Mobile	Mobile

Share of Video Time (A18+)



Estimated Share

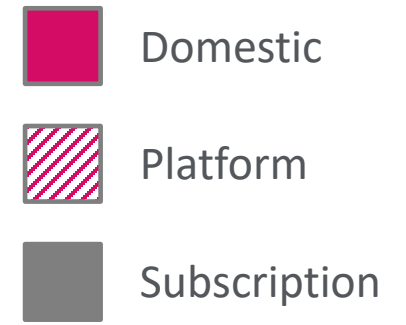
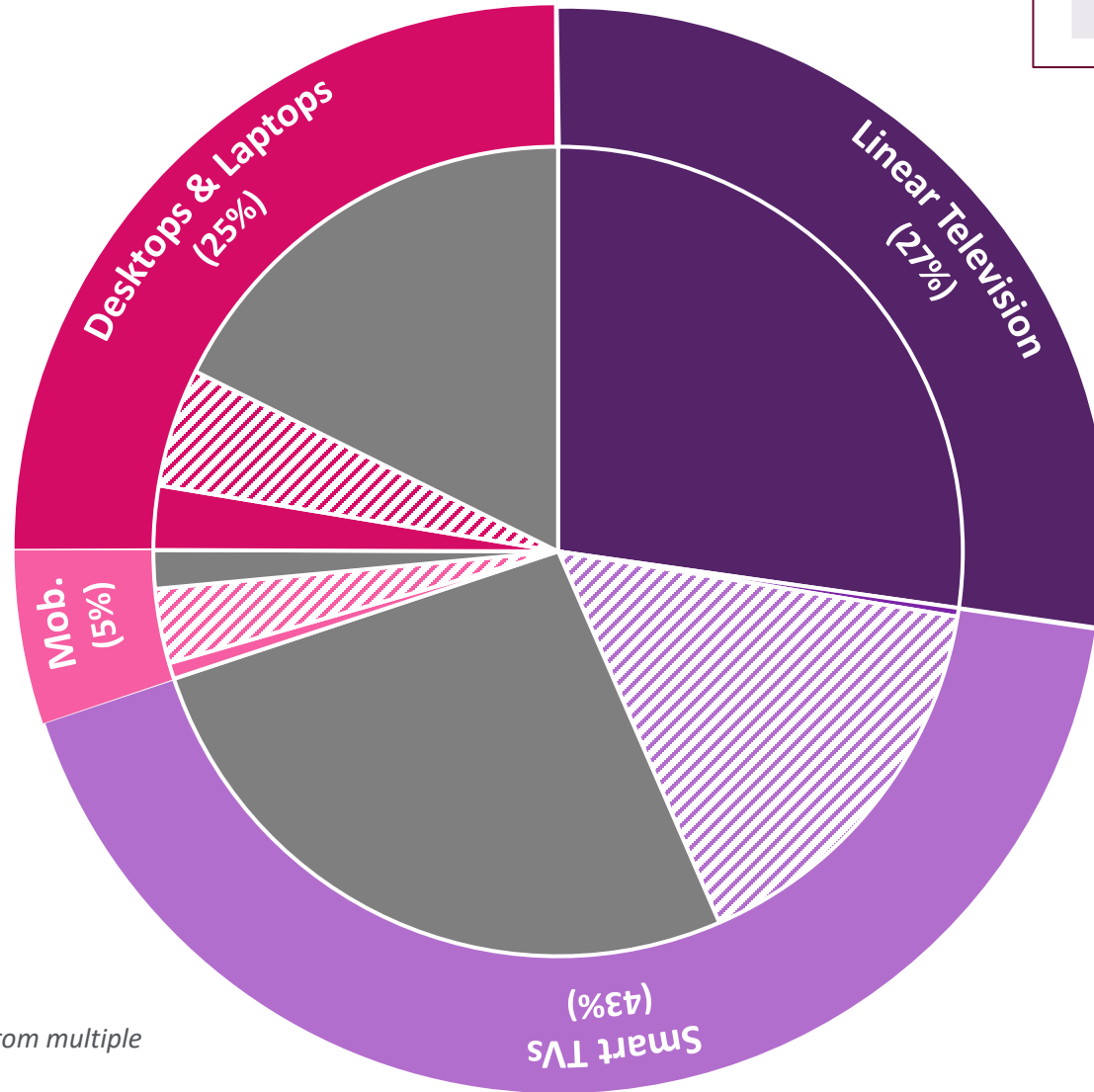
	Total Video	Digital Video
Ad-Funded	69%	37%
Domestic	53%	6%



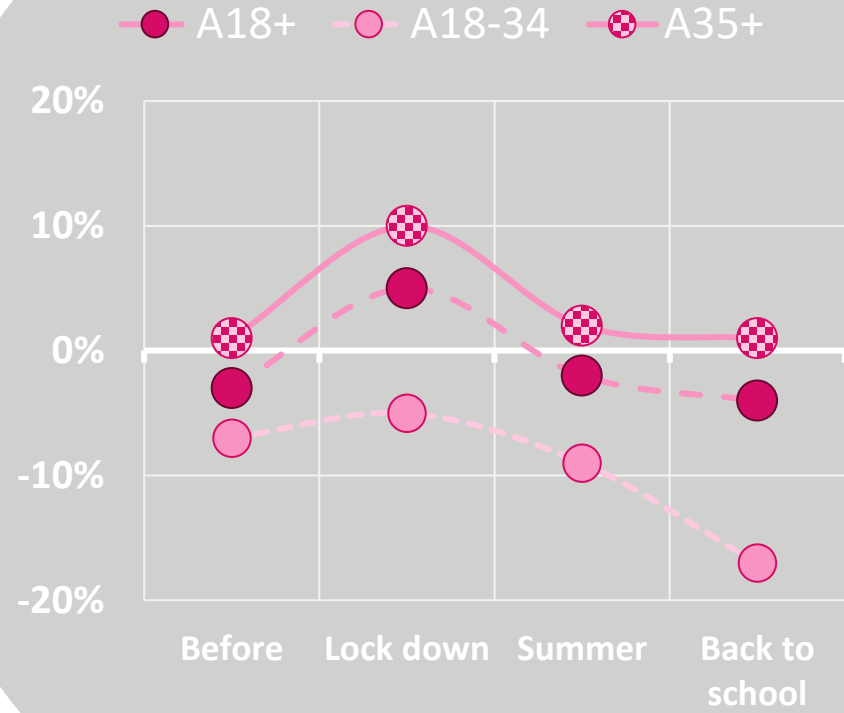
Share of Video Time (A18-34)

Estimated Share

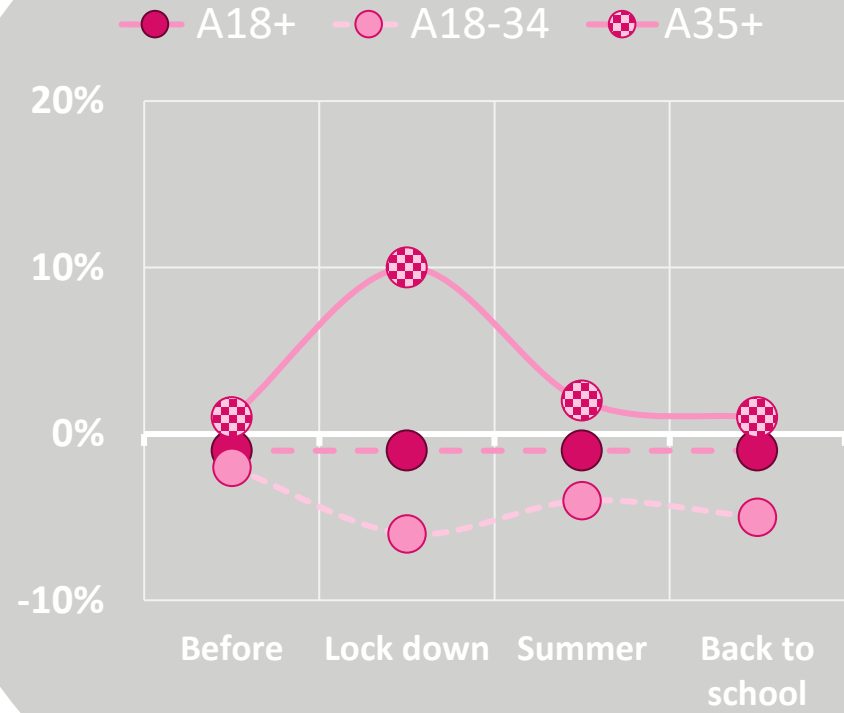
	Total Video	Digital Video
Ad-Funded	54%	37%
Domestic	31%	5%



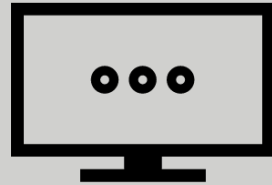
TV Momentum (Time)



TV Momentum (Reach)



Digital Video



+11%

OTT Penetration



+18%

Streaming visits on
desktop & mobile
(March to October vs 2019)







+182%

Transactional TV On-
Demand







Momentum




Upward Momentum

-  **General Internet**
+20% time
-  **Video Gaming**
+25% people increased time¹
-  **Virtual Classrooms**
+21% of households¹
-  **TV35+**
+1% time, +1% reach
-  **OTT**
+11% subs (~2 years of growth)¹
+182% Transactional VOD²
-  **Digital Video**
+18% site visits

Downward Momentum

-  **Overall Radio**
-16% time
-  **Overall TV**
-4% time = 1 year of decline
-  **Overall OOH**
-28% time
-  **TV A18-34**
-17% time = 2.5 years of decline
-5% reach = 4 years of decline



-  Likely a short-term trend
-  Likely a long-term trend
-  Likely to slow but continue





Improving Measurement





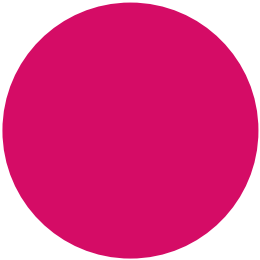
Content	Popularity
	Broad Audience
	Custom Audience
	Open
Advertising	Delivery
	Broad Audience
	Custom Audience
	Competitor
	Effects

Numeris VAM – Cross Platform Video Content		Vividata Metrica - Digital content with rich survey	
TV	Smart TV	Desktop	Mobile



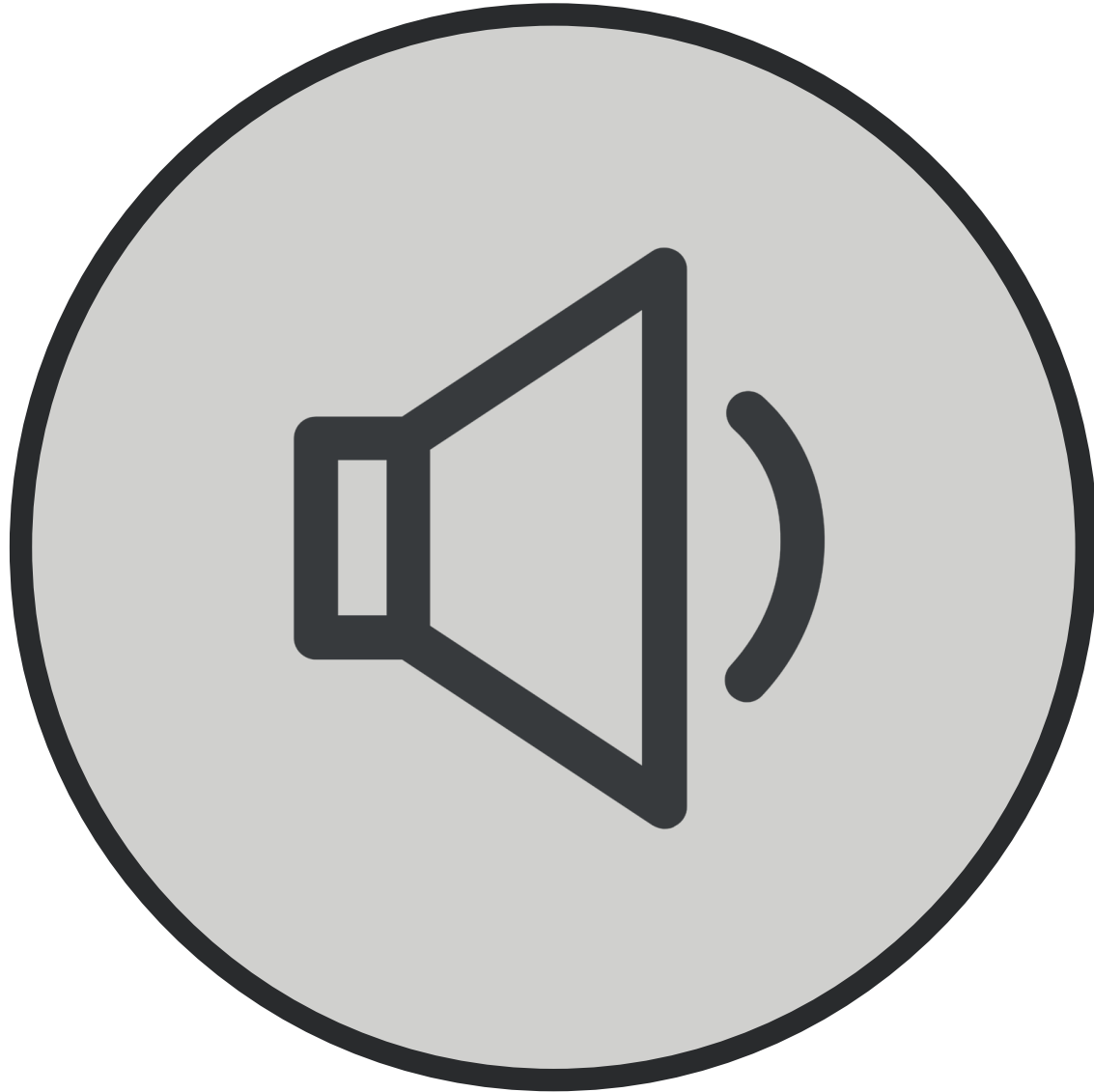
Top Canadian Song in Canada?

The Weeknd: Blinding Lights



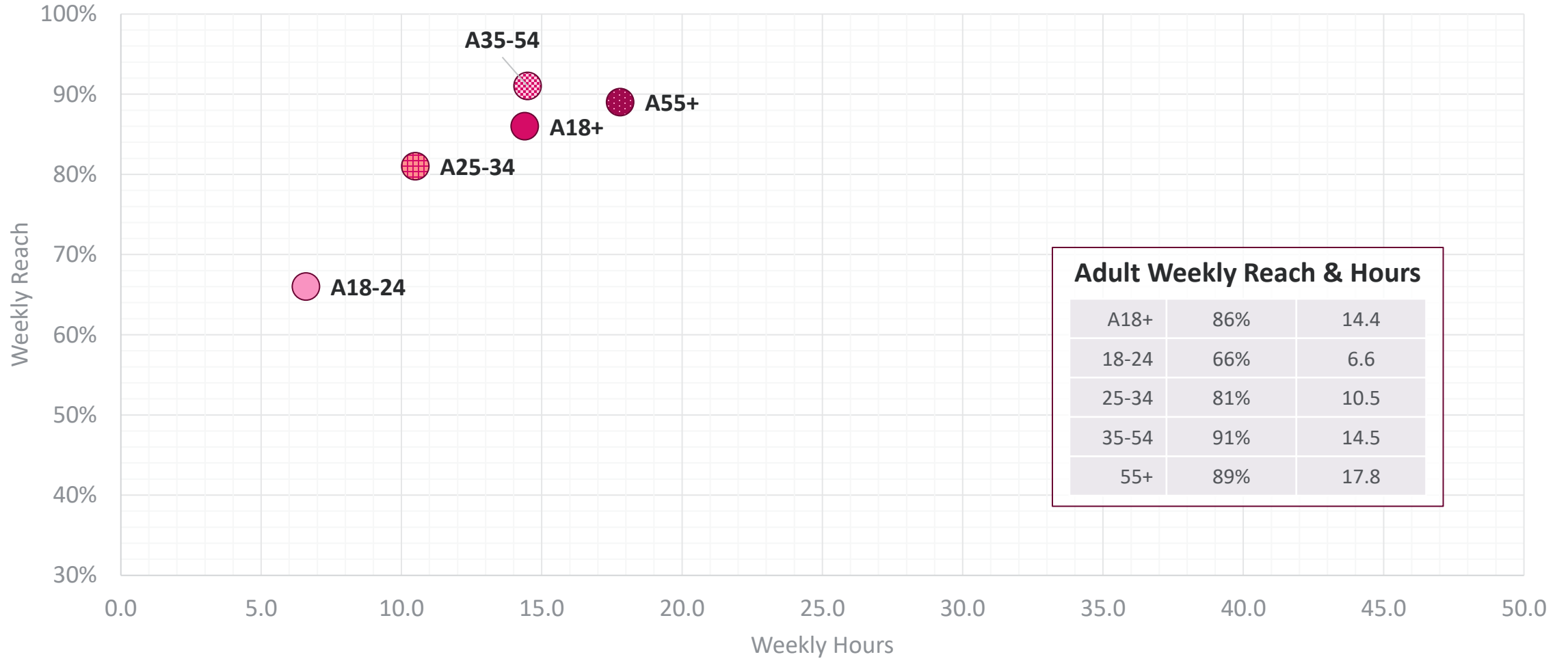


Audio





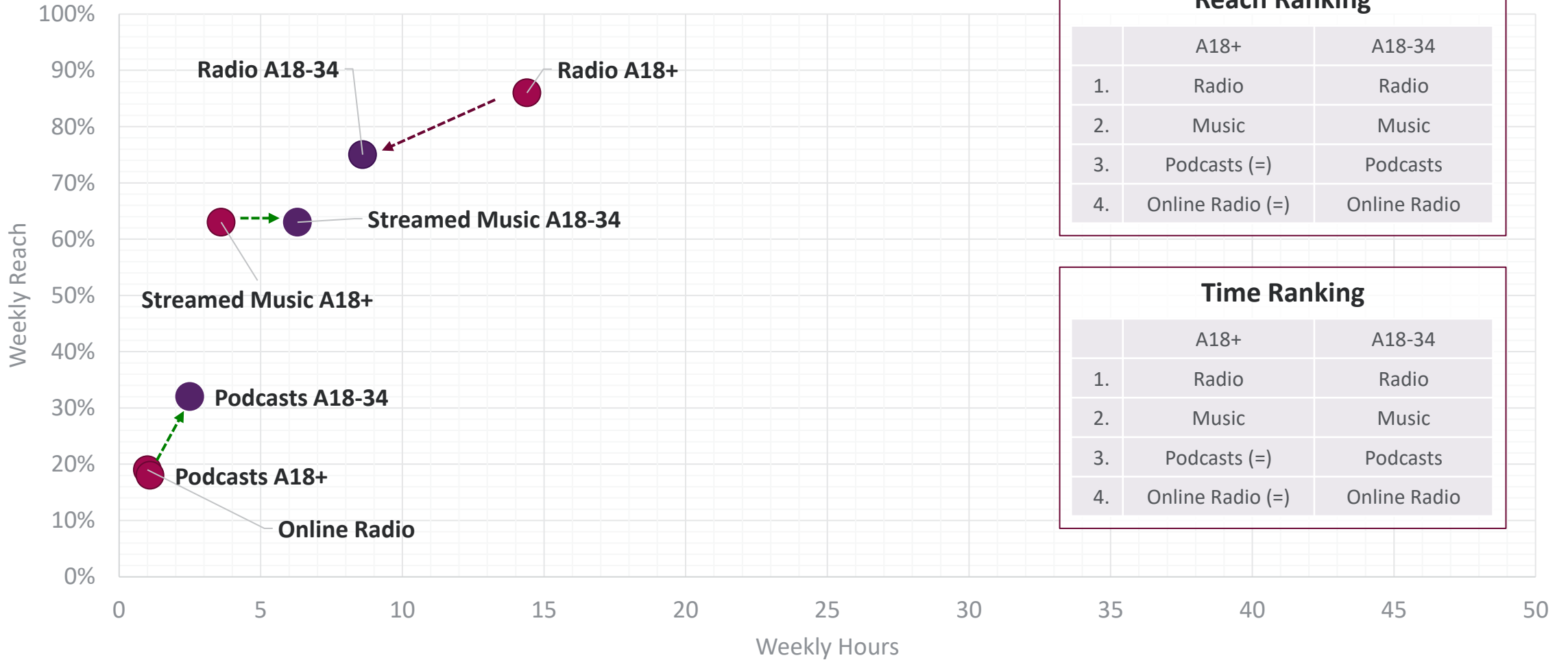
Radio



A18+	86%	14.4
18-24	66%	6.6
25-34	81%	10.5
35-54	91%	14.5
55+	89%	17.8



Audio



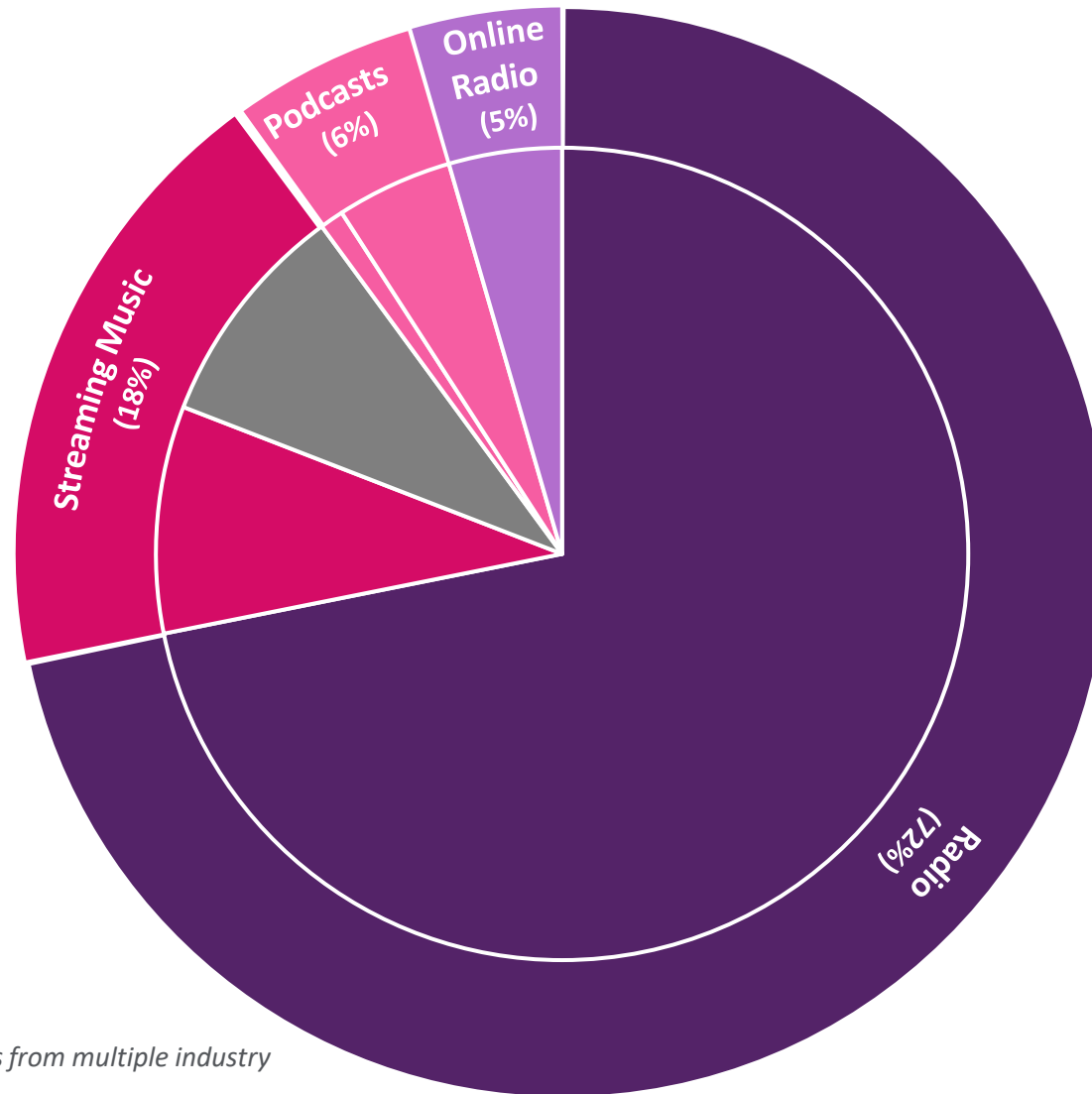
Reach Ranking

	A18+	A18-34
1.	Radio	Radio
2.	Music	Music
3.	Podcasts (=)	Podcasts
4.	Online Radio (=)	Online Radio

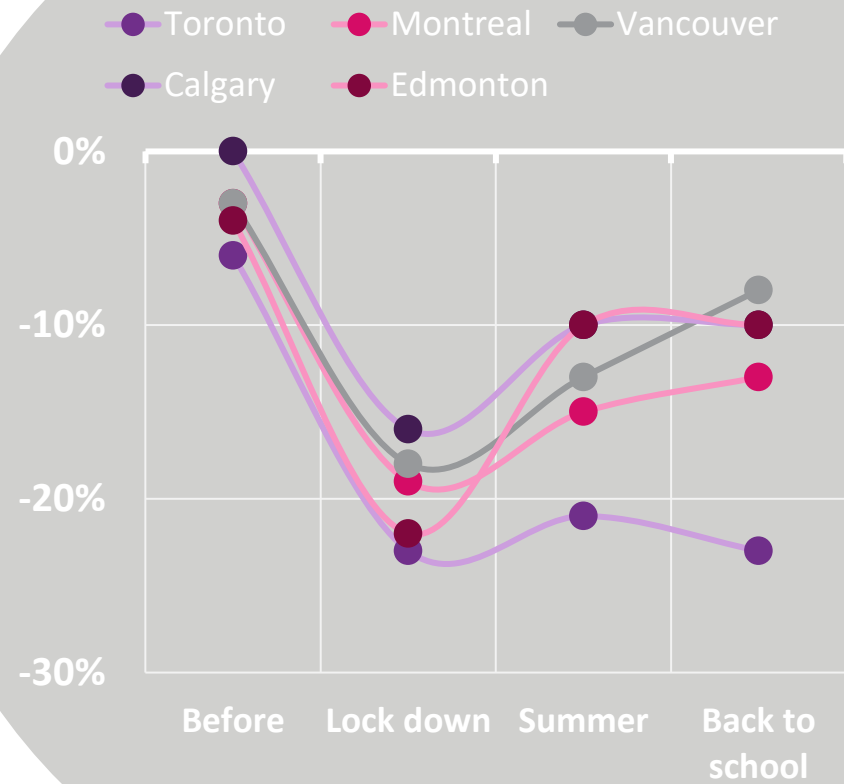
Time Ranking

	A18+	A18-34
1.	Radio	Radio
2.	Music	Music
3.	Podcasts (=)	Podcasts
4.	Online Radio (=)	Online Radio

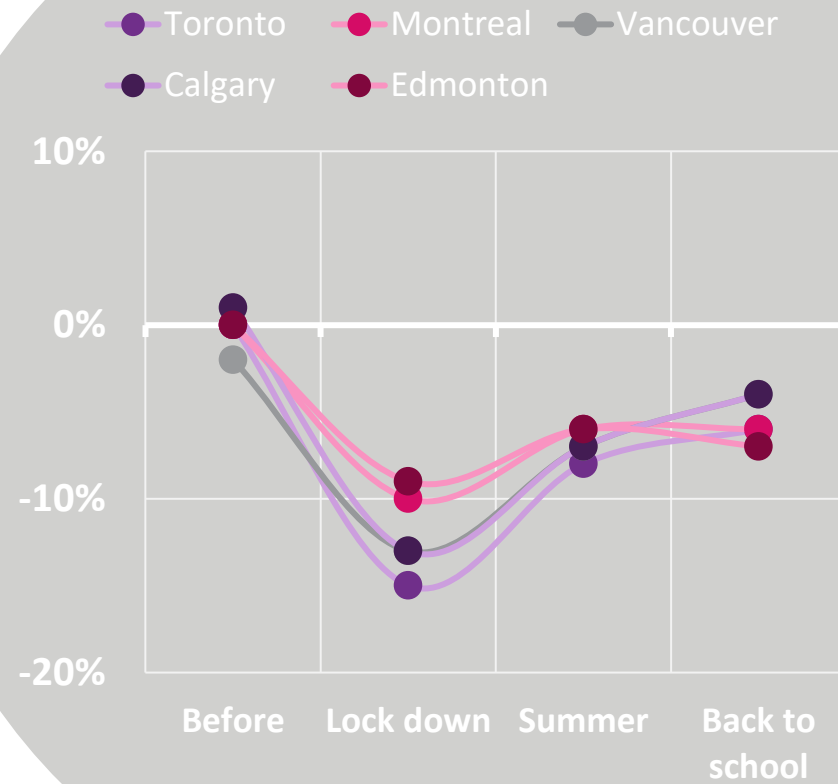
Share of Audio Time (A18+)



Radio Momentum (Time A18+)



Radio Momentum (Reach A18+)



Digital Audio



+7%

Monthly Podcast
Penetration
(English Canada)










+16%

Audio streaming visits on
desktop & mobile
(March to October vs 2019)³







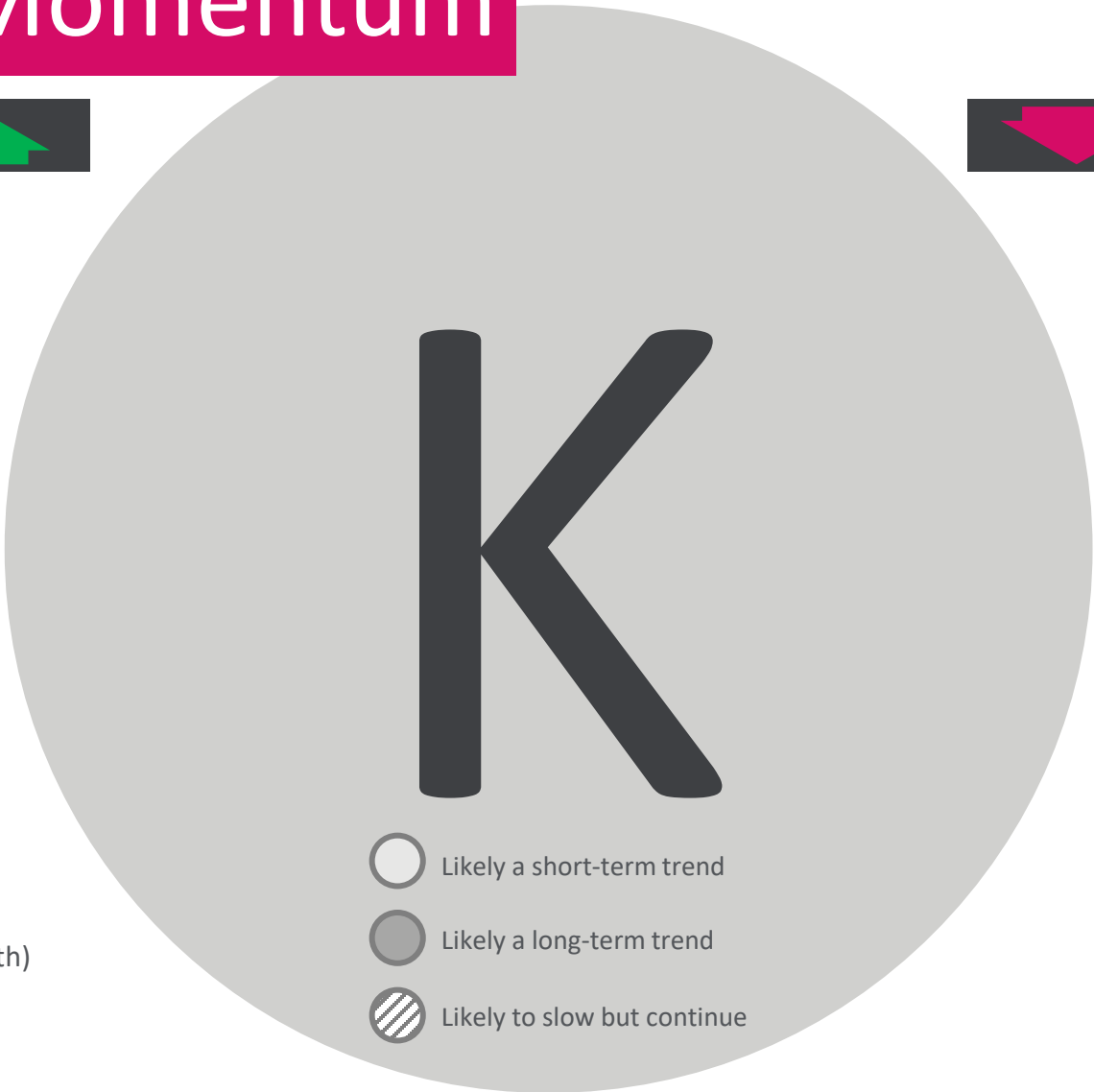
Momentum




Upward Momentum

-  **General Internet**
+20% time
-  **Video Gaming**
+25% people increased time¹
-  **Virtual Classrooms**
+21% of households¹
-  **TV35+**
+1% time, +1% reach
-  **OTT**
+11% subs (~2 years of growth)¹
+182% Transactional VOD²
-  **Digital Video**
+18% site visits
-  **Digital Audio**
+16% streaming (~2 yrs growth)¹
+7% Podcast penetration (~2 yrs growth)

Downward Momentum

-  **Overall Radio**
-16% time
-  **Overall TV**
-4% time = 1 year of decline
-  **Overall OOH**
-28% time
-  **TV A18-34**
-17% time = 2.5 years of decline
-5% reach = 4 years of decline



-  Likely a short-term trend
-  Likely a long-term trend
-  Likely to slow but continue



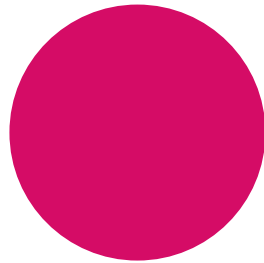
Source: Numeris, Vividata, PHD estimates from multiple sources, Pattison, MTM, Samsung, Similarweb, Canadian Podcast Listener





Top Canadian Book in Canada?

Margaret Atwood: The Testaments



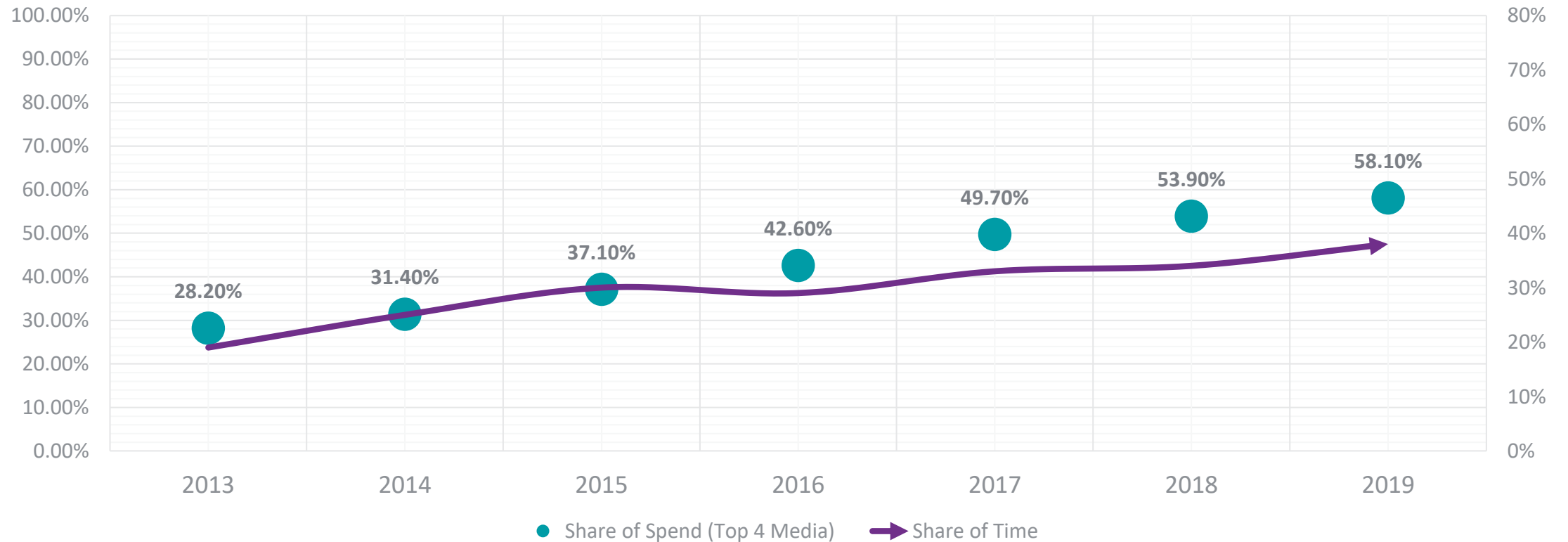


eCommerce



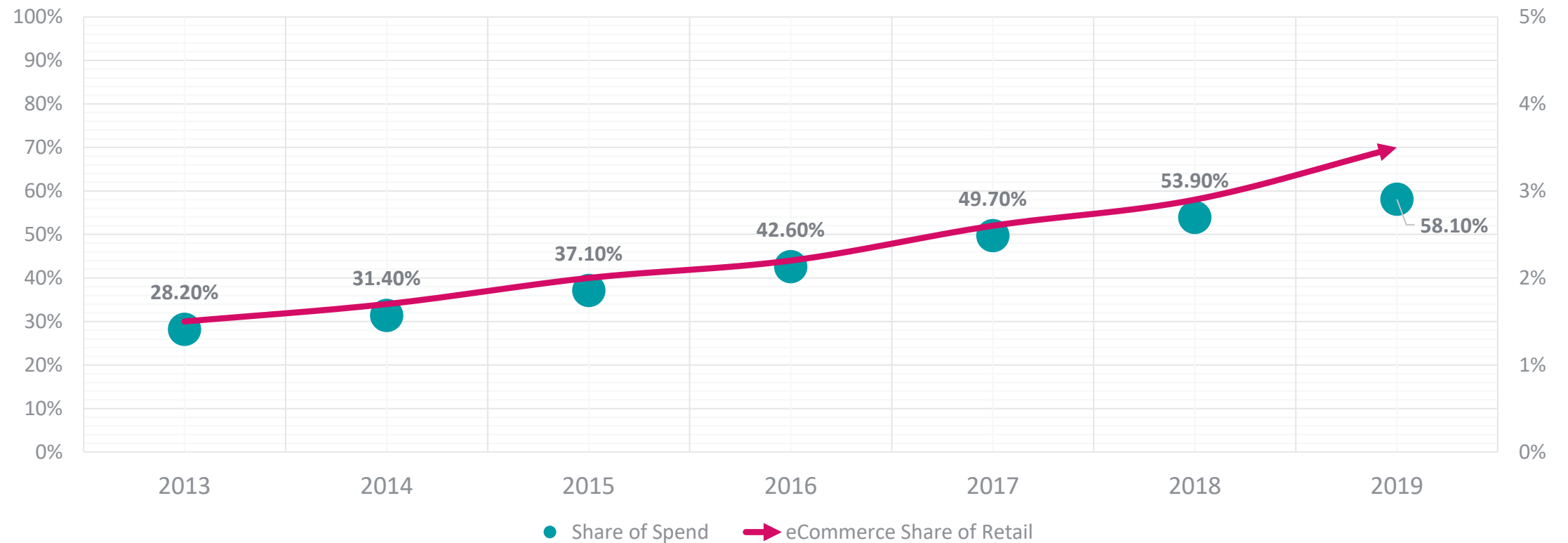
Digital \$ out-pacing Share of Time

Internet Share of Time vs Share of Spend



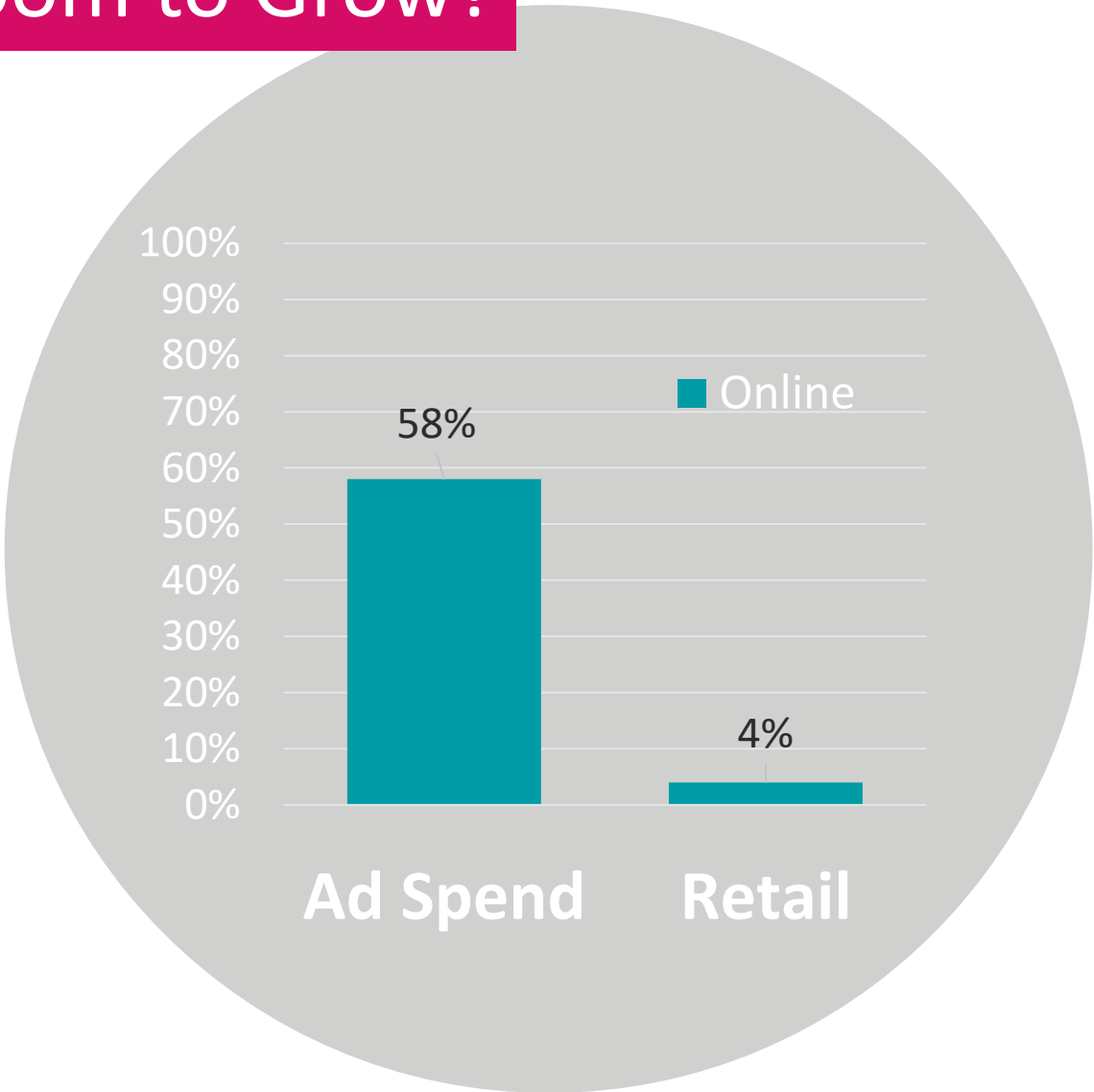
Digital \$ closely tied to eCommerce share

Internet Share of Spend vs eCommerce Share of Retail

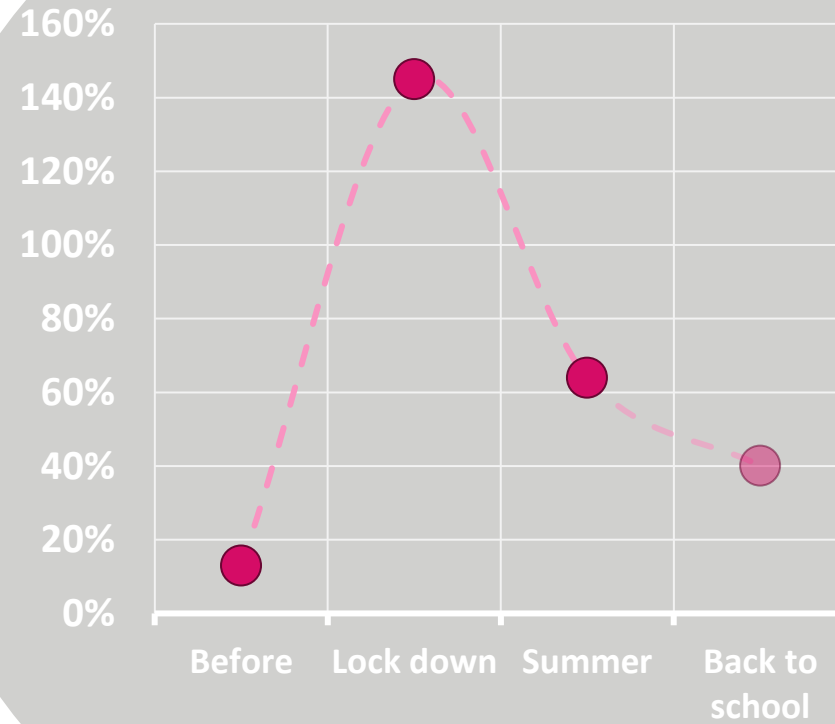




Room to Grow?











eCommerce Momentum









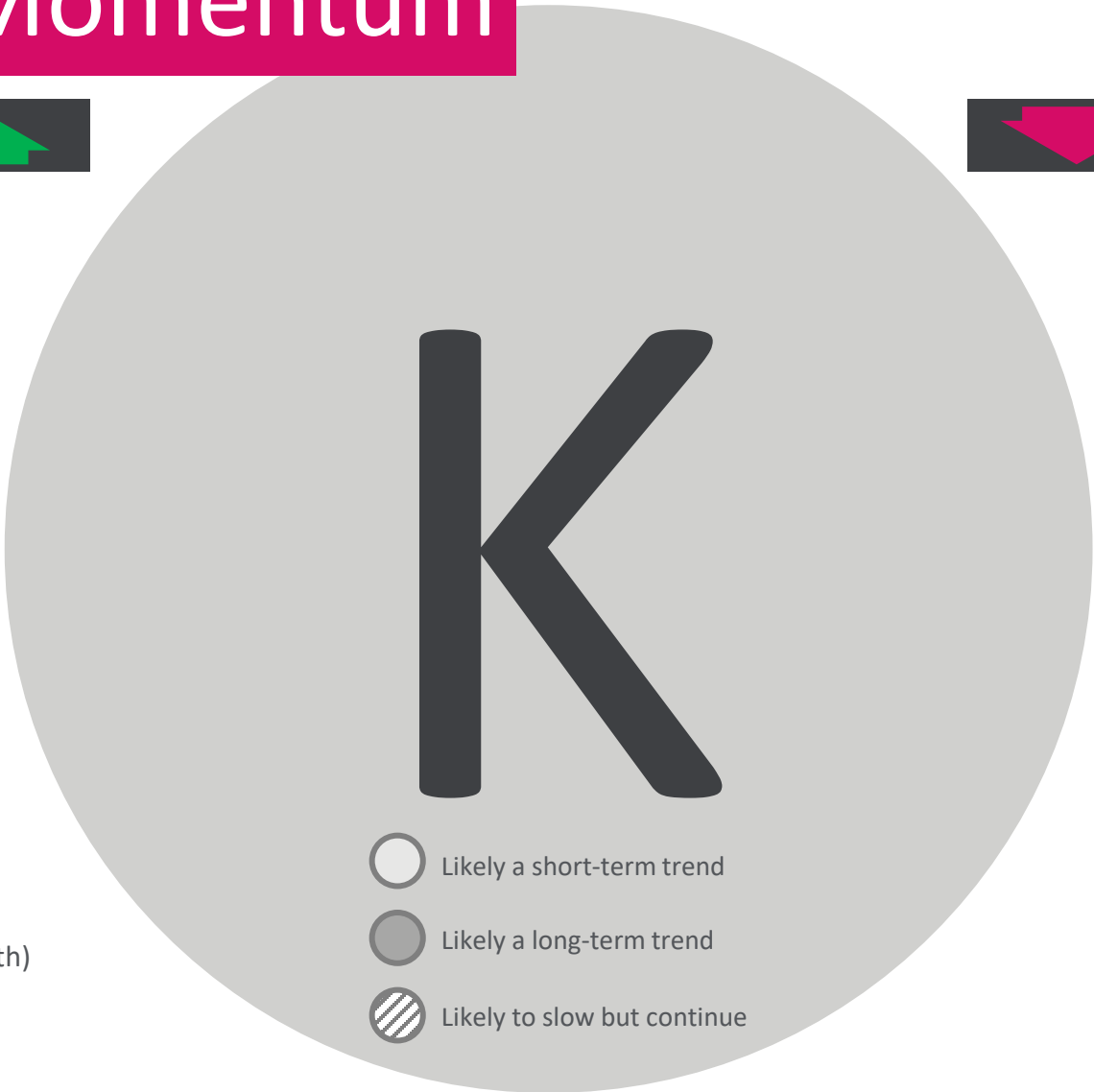
Momentum




Upward Momentum

-  **General Internet**
+20% time
-  **Video Gaming**
+25% people increased time¹
-  **Virtual Classrooms**
+21% of households¹
-  **TV35+**
+1% time, +1% reach
-  **OTT**
+11% subs (~2 years of growth)¹
+182% Transactional VOD²
-  **Digital Video**
+18% site visits
-  **Digital Audio**
+16% streaming (~2 yrs growth)¹
+7% Podcast penetration (~2 yrs growth)
-  **eCommerce**
+40-60% share post-lockdown,
2-3 years of growth

Downward Momentum

-  **Overall Radio**
-16% time
-  **Overall TV**
-4% time = 1 year of decline
-  **Overall OOH**
-28% time
-  **TV A18-34**
-17% time = 2.5 years of decline
-5% reach = 4 years of decline



-  Likely a short-term trend
-  Likely a long-term trend
-  Likely to slow but continue



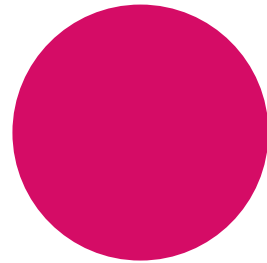
Source: Numeris, Vividata, PHD estimates from multiple sources, Pattison, MTM, Samsung, Similarweb, Canadian Podcast Listener, Statistics Canada





Top Program in Québec

Tout Le Monde en Parle



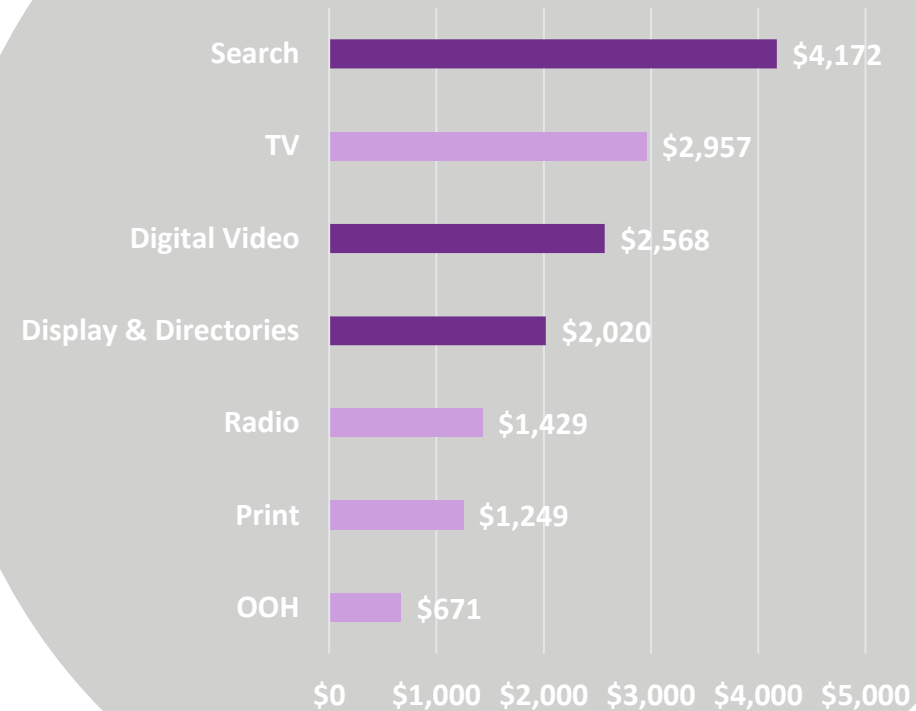


Money



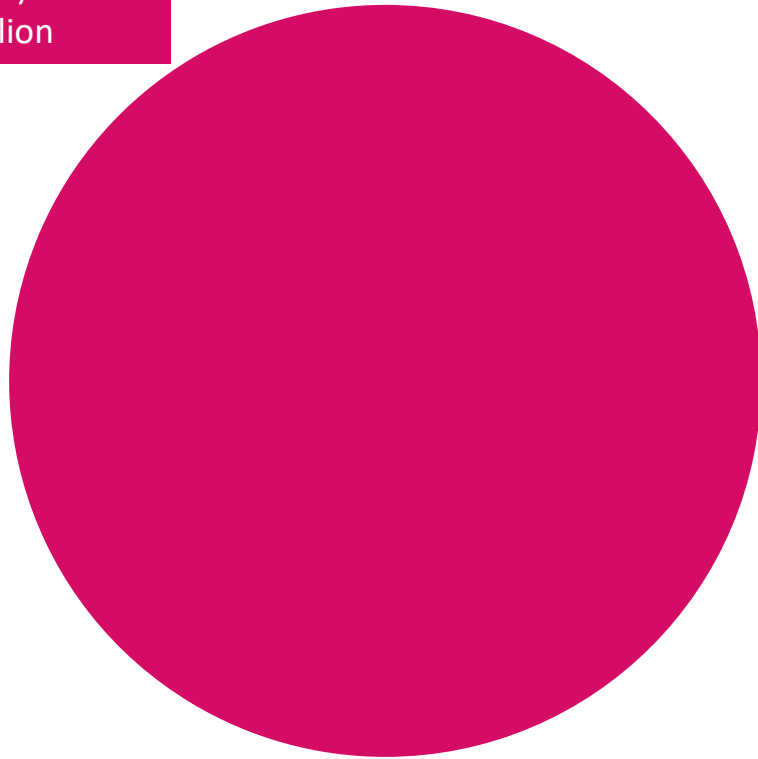
Digital Dominates

2019 Advertising Investment

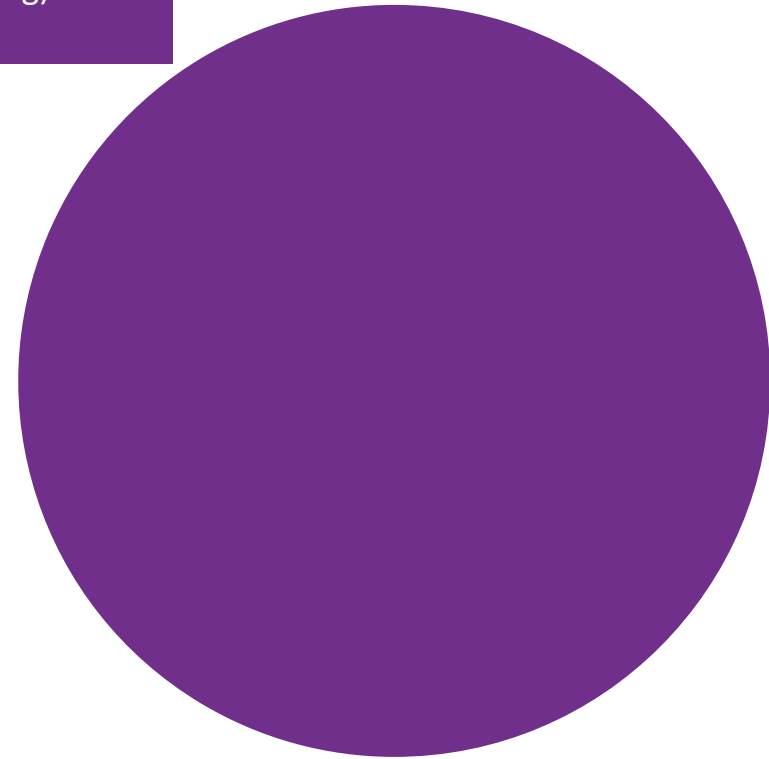




Total Advertising
(Top 4 Media)
\$13,955 million

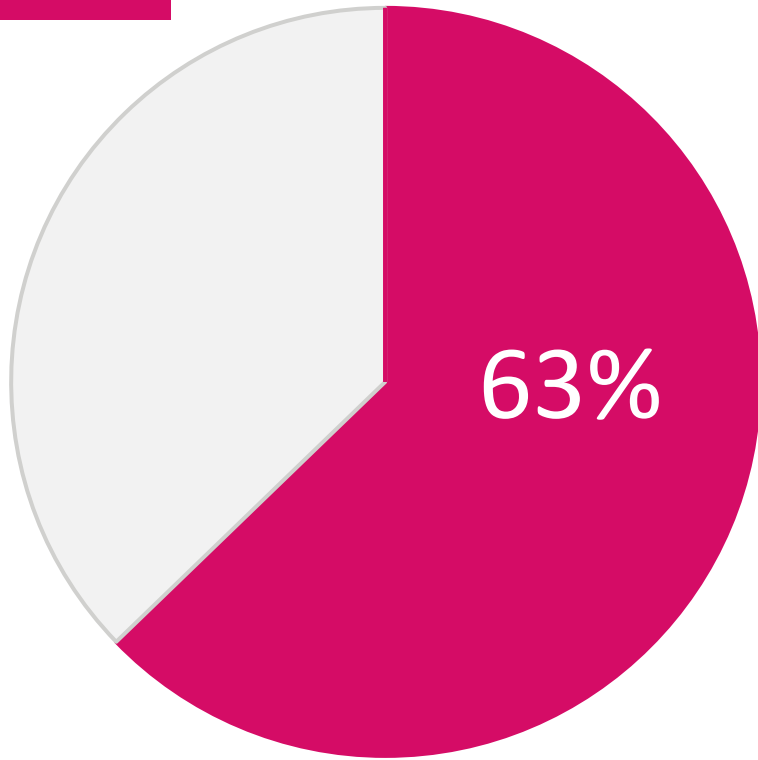


Weekly Hours
(inc Streaming)
75

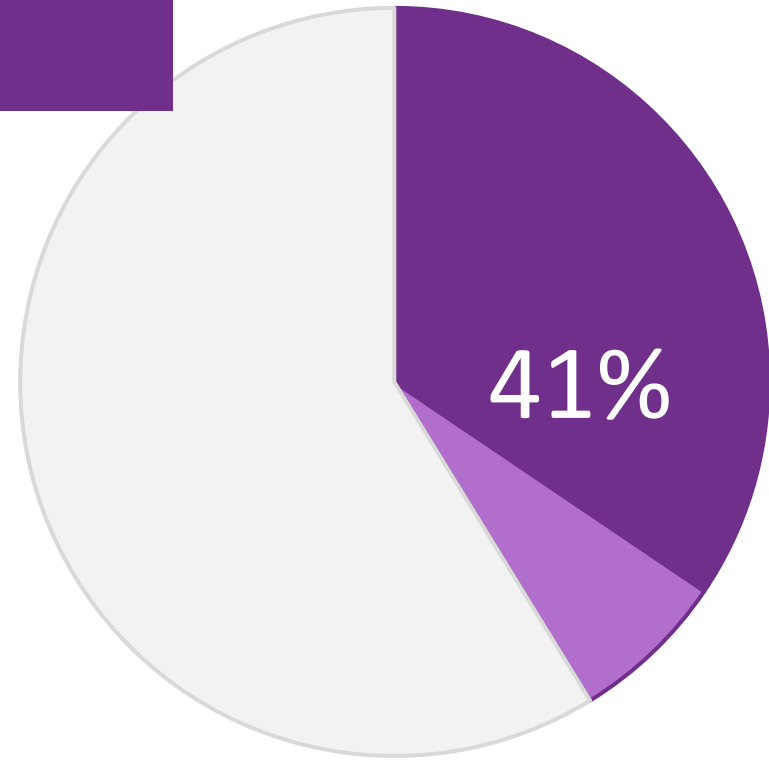




Internet
\$8,760 million

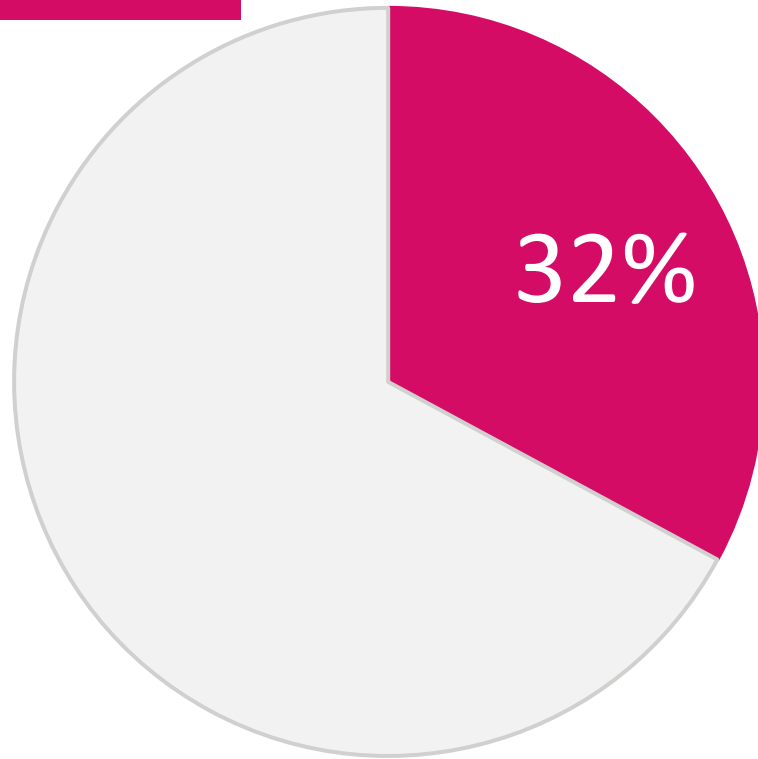


Internet
(inc Ad-funded
Streaming)
28

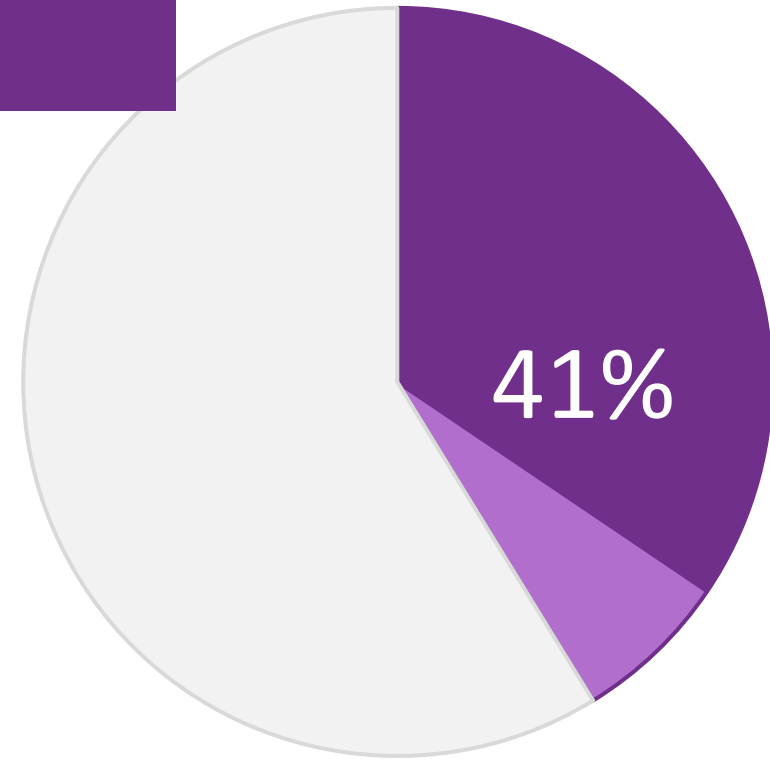




Internet ex Search
\$4,588 million

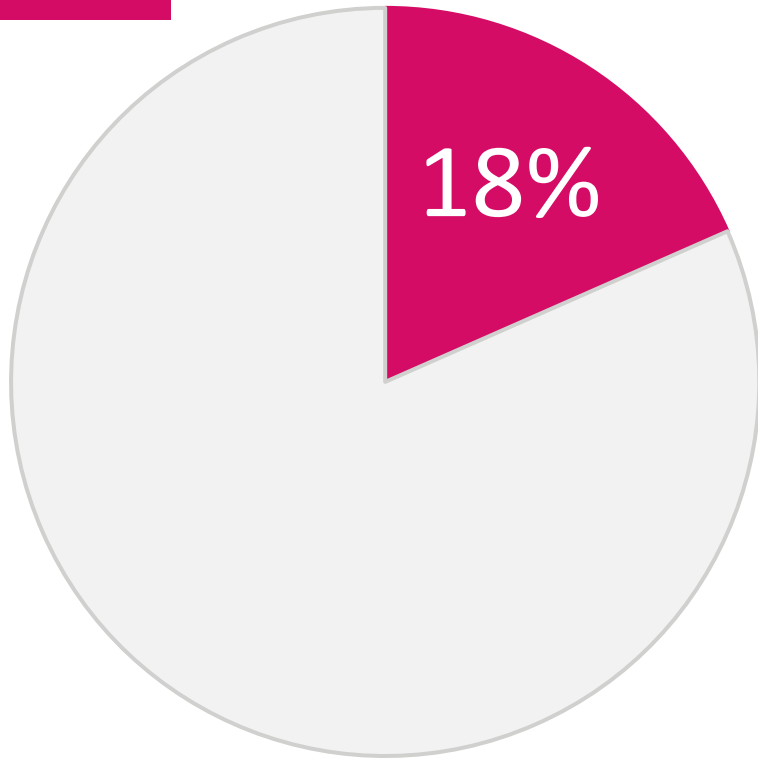


Weekly Hours
(inc Ad-funded
Streaming)
28

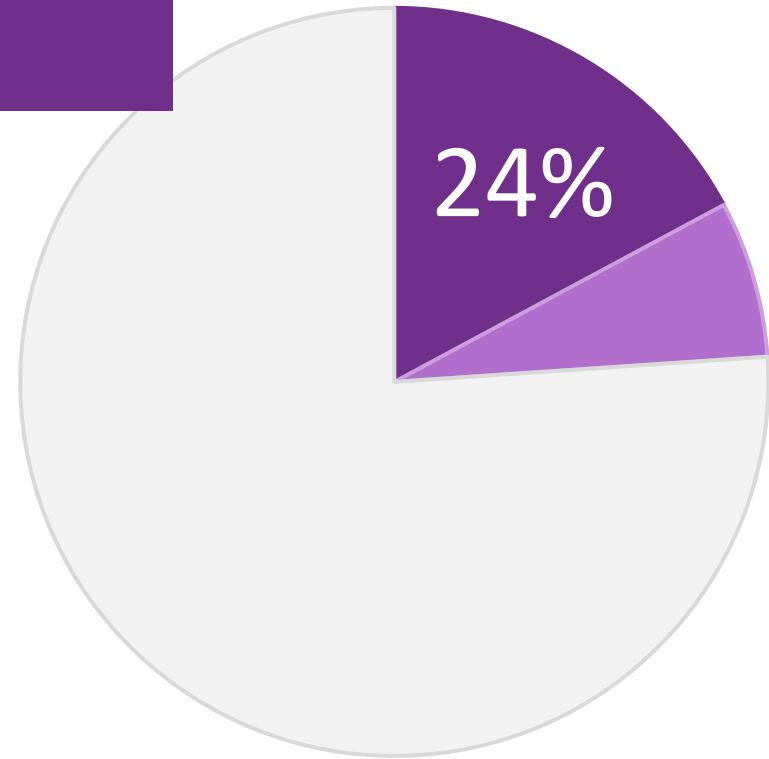




Video
\$2,568 million

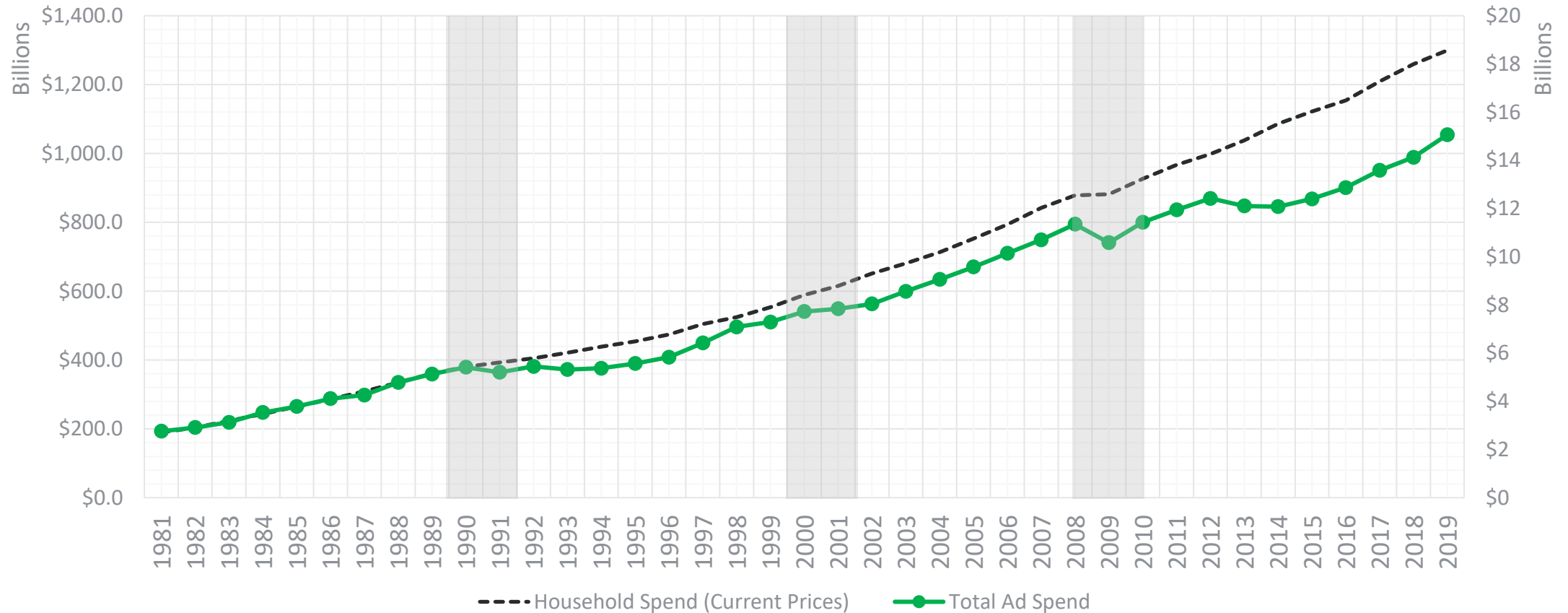


Digital Video
(inc Ad-Funded
Streaming)
16

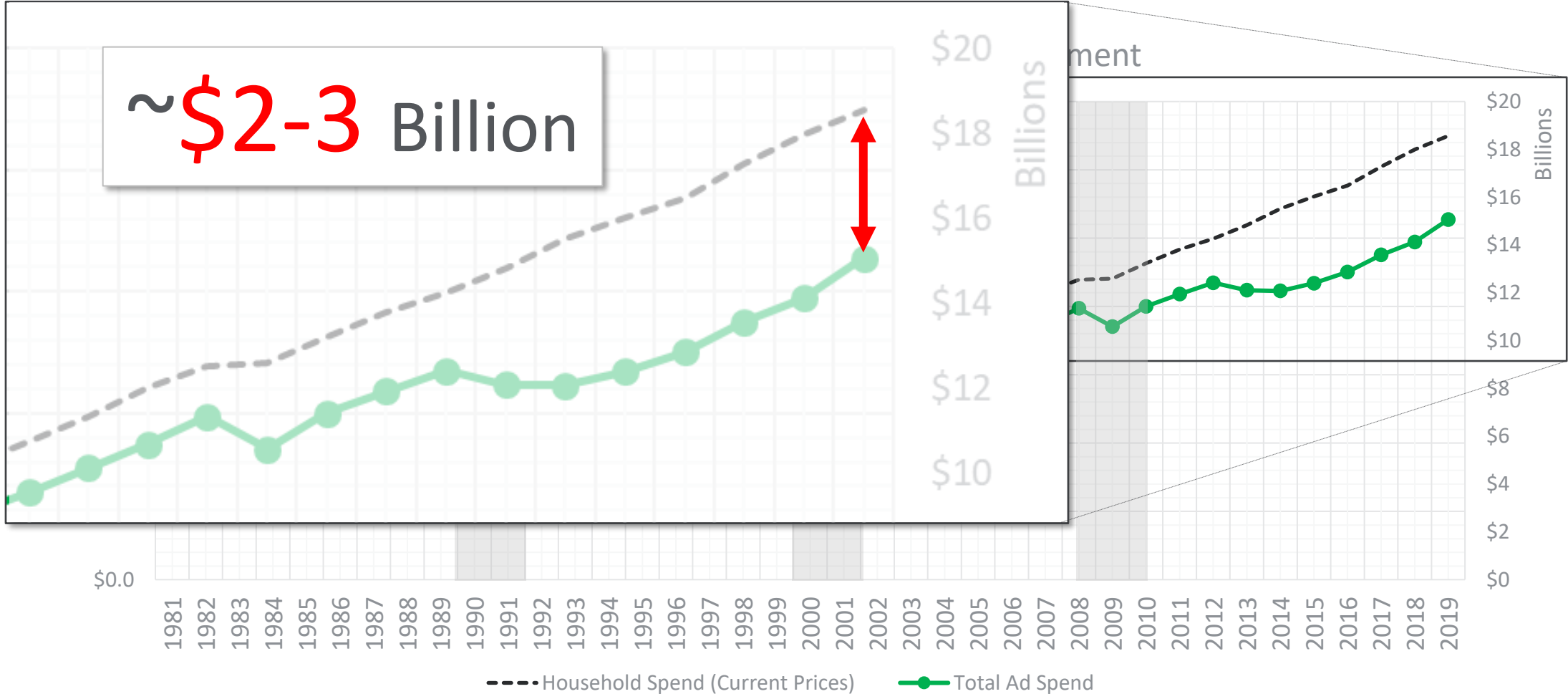


The Growth Gap

Household Spend vs Total Advertising Investment



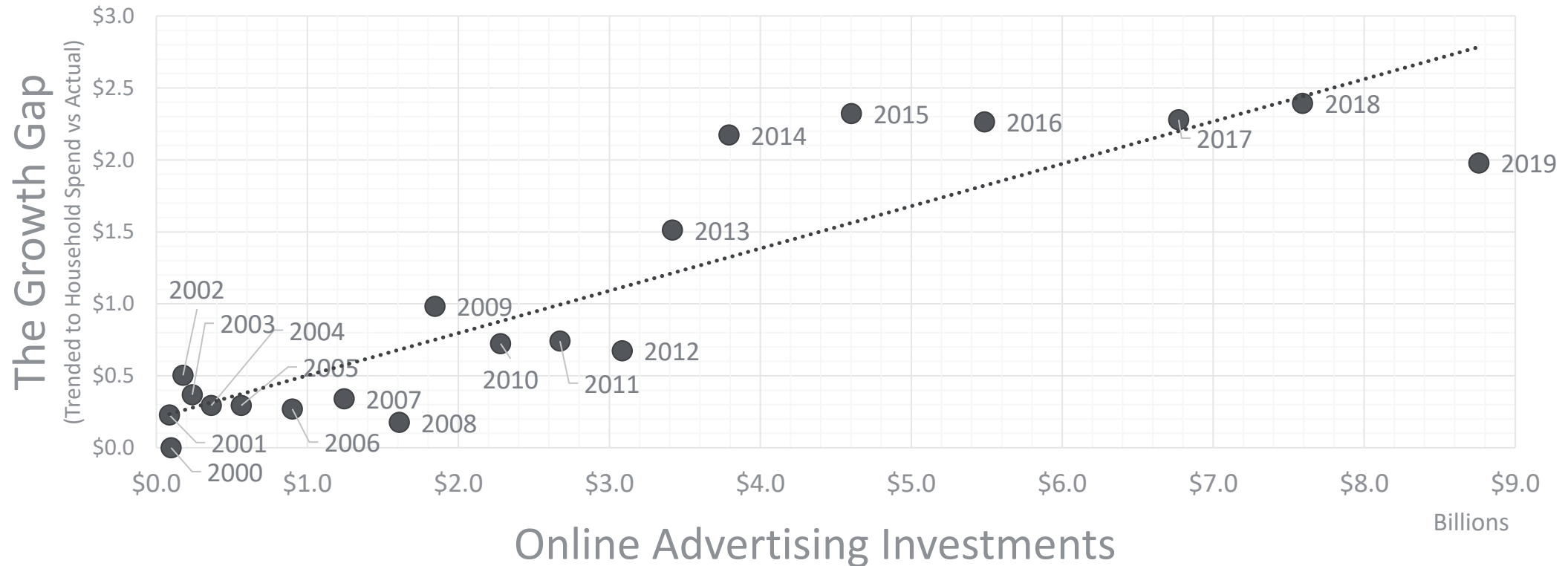
The Growth Gap



Is Digital Contributing to the Growth Gap?

\$1 gain in digital investment correlates to \$0.35 increase in the Growth Gap

The Growth Gap vs Online Advertising



Are Brands Missing Growth Opportunity?



Journal of Advertising

Routledge
Taylor & Francis Group

ISSN: 0091-3367 (Print) 1557-7805 (Online) Journal homepage: <http://www.tandfonline.com/loi/ujoa20>

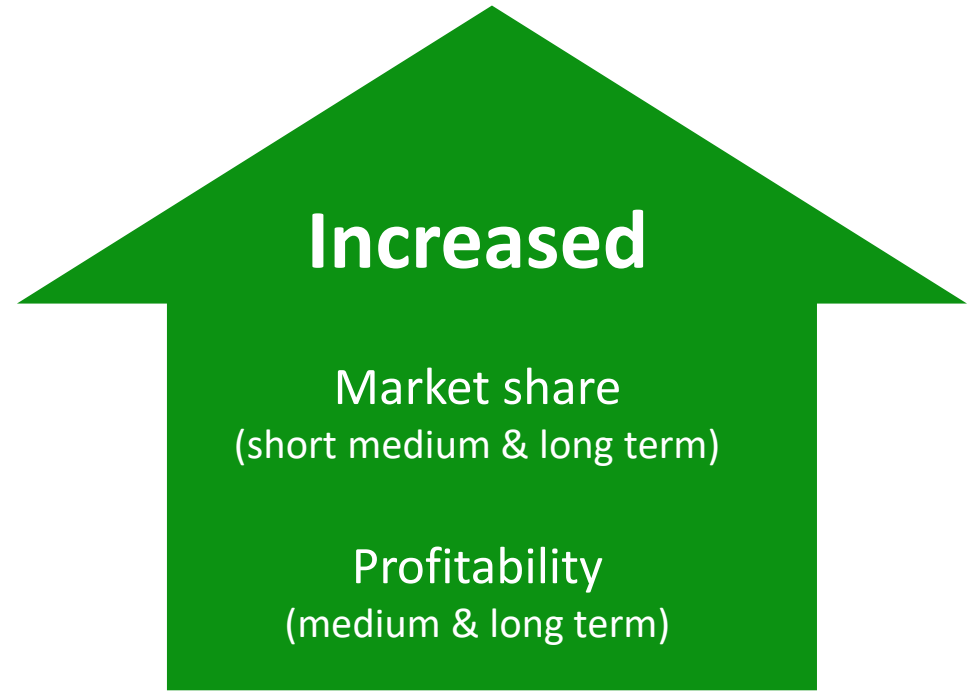
Advertising Budgeting: A Reinvestigation of the Evidence on Brand Size and Spend

Nick Danenberg, Rachel Kennedy, Virginia Beal & Byron Sharp

To cite this article: Nick Danenberg, Rachel Kennedy, Virginia Beal & Byron Sharp (2015): Advertising Budgeting: A Reinvestigation of the Evidence on Brand Size and Spend, Journal of Advertising, DOI: [10.1080/00913367.2015.1090938](https://doi.org/10.1080/00913367.2015.1090938)

To link to this article: <http://dx.doi.org/10.1080/00913367.2015.1090938>

Investing in Ads in a downturn

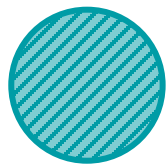




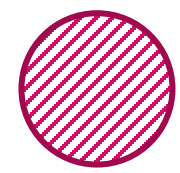
Momentum

Upward Momentum 

 Downward Momentum






Digital advertising's share of total investment



Overall advertising spend



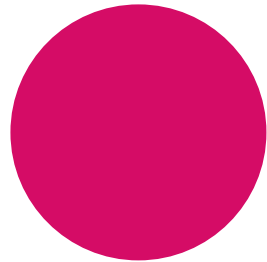
-  Likely a short-term trend
-  Likely a long-term trend
-  Likely to slow but continue





Classical Plot

Shane, 1953



Lone Hero, 'lowly' status

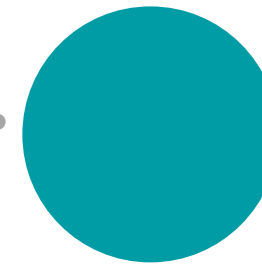
Protects the community

Morally good



Professional Plot

Magnificent Seven,
1960



Team of experts

Compete with the villains

Morally ambivalent







Implications



Major Trends

1.

Lots of opportunity for reach and competition for investment

2.

Advertising-accessible share of time is shrinking

3.

Video is growing overall across multiple devices

4.

Measurement is improving and continued innovation needed

5.

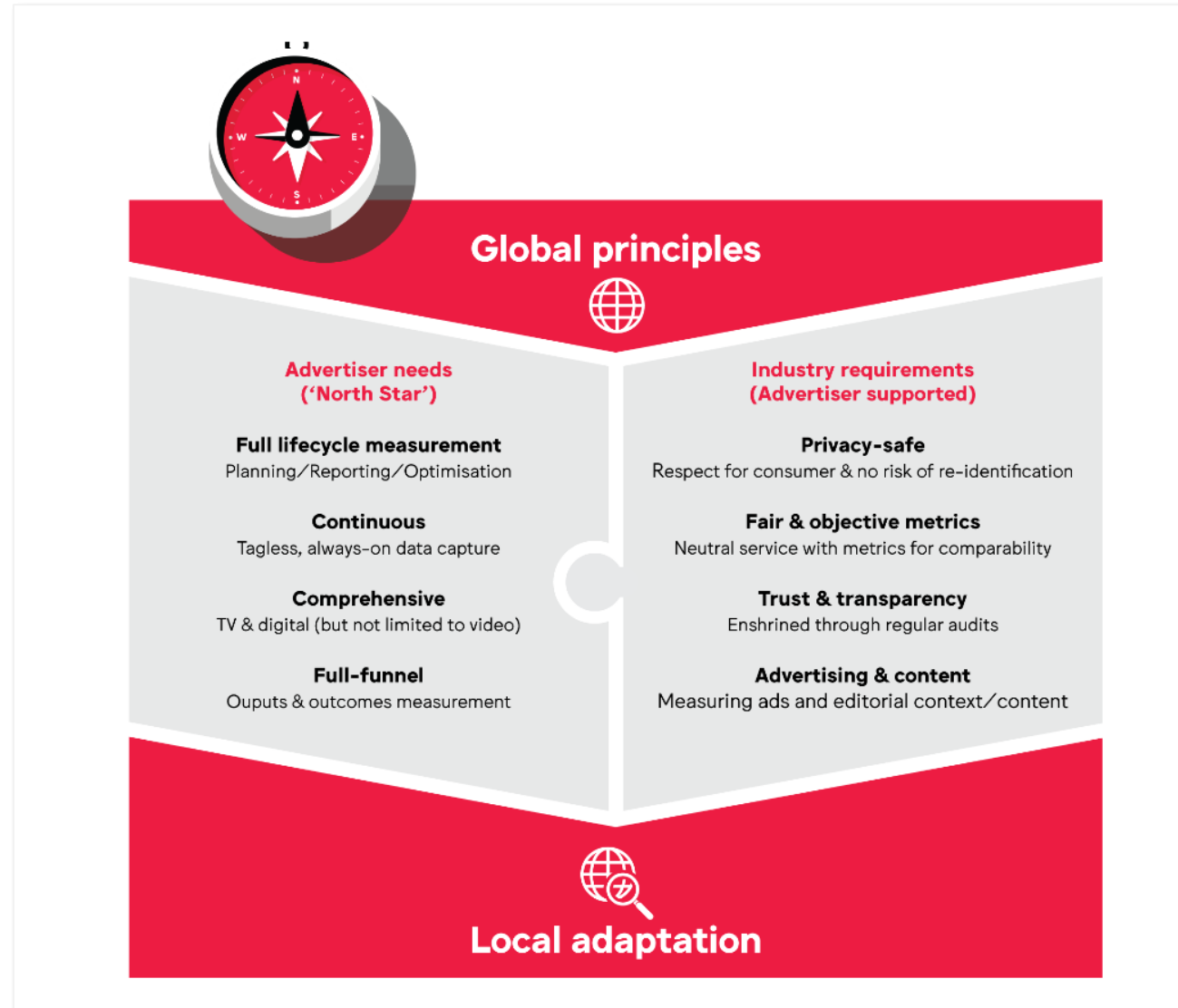
eCommerce has been a major driver of digital spend adoption

6.

Overall, digital is now dominant but in a declining industry

The key showdown

The World Federation of Advertisers View...





Sustainable Growth: Industry



1.

Marketing Effectiveness

Sponsor industry efforts. Simplify brand equity measurement. Minimize over-attribution.

2.

Measurement

Engage with MRC. Embrace WFA.

3.

Share of Voice Reporting

Report faster, more granular

Sustainable Growth: Advertisers & Agencies

1.

Marketing Effectiveness

Understand short & long term impacts. Minimize over-attribution.

2.

Fund appropriately

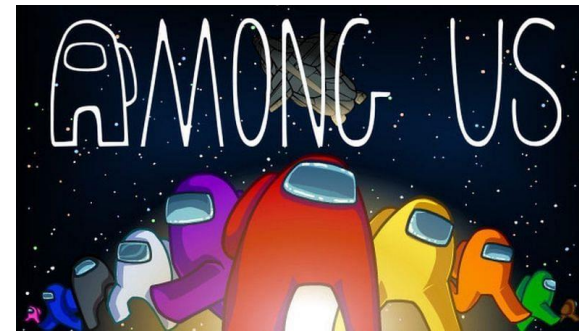
Build demand *and* fund transition to eCommerce reality

3.

Objectives then channels

Build reach & impact across media

One more thing



1. Transcend platforms

2. Resonate with Culture

3. Bring people together

Additional Material



Grace Kite:
The Two Tasks of Online Advertising



Orlando Wood:
*EffWorks Global 2020:
Achtung!*
(Features of Successful Online Video Campaigns)



Gerard J. Tellis:
A Critical Review of Research on Advertising in a Recession



Thank you

