



CMUST

Canadian Media Usage Study

Prepared by PHD, November 2024

2024

What's CMUST?

This is the 21th annual addition of CMUST. Since its inception in 2004, PHD Canada's Canadian Media Usage Study (CMUST) has been the only widely available, in-depth examination of multi-media usage sourced from the multiple research audience currencies of record.

The study documents consumers' changing media consumption as digital technologies increasingly impact Canadians' habits. 2024 saw accelerated growth of the Smart TV and streaming video as a key consumption point for Canadians. This continues a 20+ year transition of media habits to digital enablement.

Another notable trend of 2024 is the rise of the 'Retail Media Network'. Various sources forecast significant growth in spend in Retail Media in the years ahead.

In this edition of CMUST we propose a view of media consumption based on 5 consumer segments – defined by their media habits. What these segments show is that lifestyle & stage are important contributors to media preferences. Generally speaking, these segments have adopted a preference for format as opposed to method of transmission. Those that embrace radio, for instance, also embrace streaming audio and podcasts.

Last year, we assessed concerns that Meta's policy on 'blocking' news in August 2023 would lead to a drop in news consumption. Revisiting the topic this year, we see a clear suggestion that the the move corresponds to a *positive* shift in momentum for news website visitation.



NUMERIS



NUMERIS
VAM



Media Technology
Monitor



SimilarWeb



EUROMONITOR
INTERNATIONAL



vividata



metrica
by vividata



THE CANADIAN
PODCAST
LISTENER

think^{tv}



VIVVIX



eMarketer

Statistics
Canada



News Media Canada
Médias d'Info Canada

Magazines
Canada



Global Media & Internet
Concentration Project

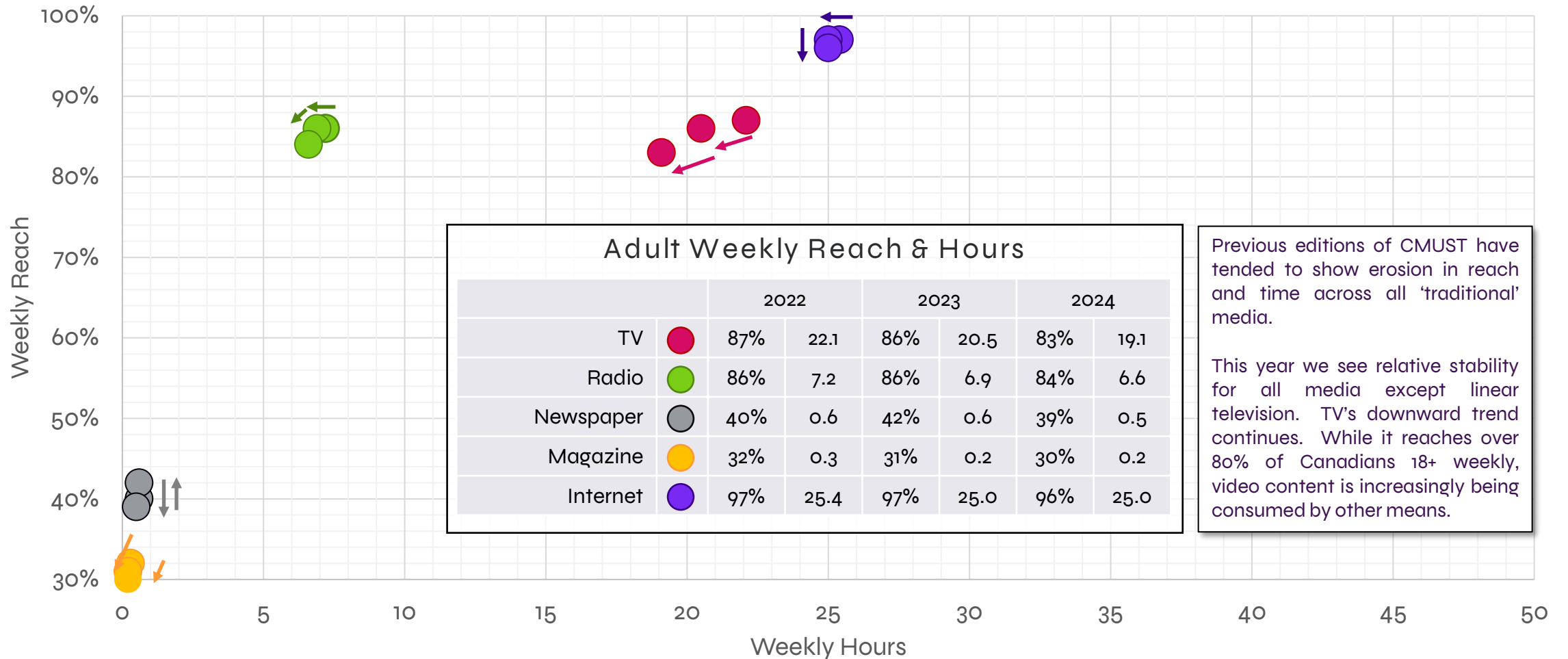


omni



iab
canada

The last 3 years: Linear TV continues its decline



Previous editions of CMUST have tended to show erosion in reach and time across all 'traditional' media.

This year we see relative stability for all media except linear television. TV's downward trend continues. While it reaches over 80% of Canadians 18+ weekly, video content is increasingly being consumed by other means.

These segments were defined by clustering the Vividata SCC and SCC Digital based on the amount of time spent with internet, video and audio content. The resulting segments are illustrative of *some* of the diversity of media consumption habits that exists in Canada.

Anxiously Affluent



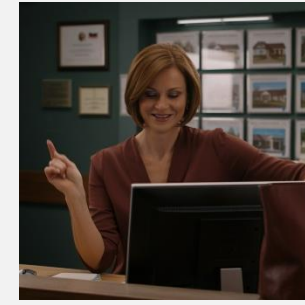
Busy Breadwinners



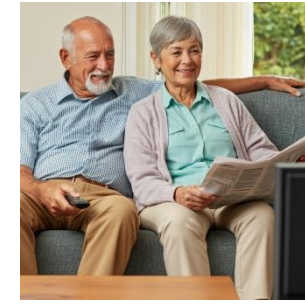
Modestly Content



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 

the Bay

Personal Appearance
categories, Food
Delivery

WINNERS 





Children's products,
Travel, Financial
Services

Walmart 

Financial Services,
Alcohol, Pet food

SHOPPERS
DRUG MART 



Cosmetic, Gardening
supplies,
books

 Jean Coutu

SHOPPERS
DRUG MART 

Will/Estate planning,
Lottery



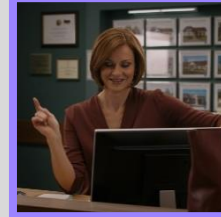
Anxiously
Affluent



Busy
Bread-
winners



Modestly
Content

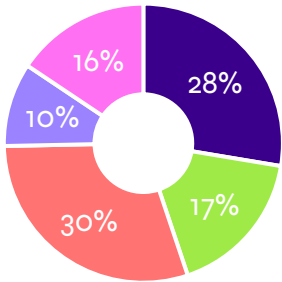


Musically
Happy

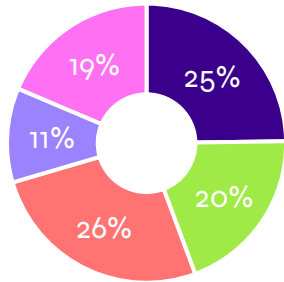


Relaxed
Retirees

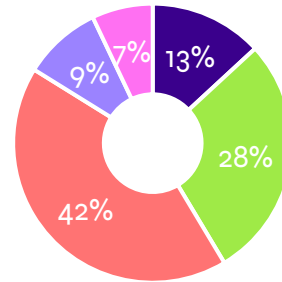
Share of
Population



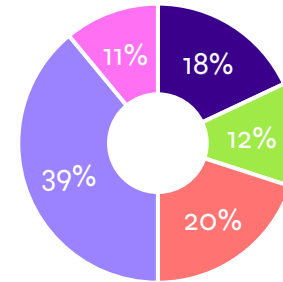
Share of Online
Spend



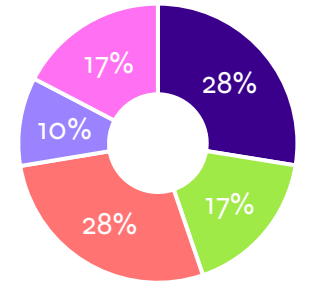
Share of
Video Time



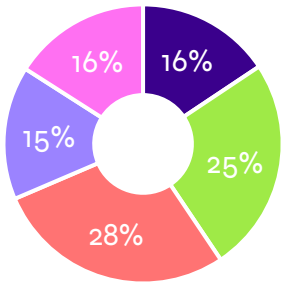
Share of
Audio Time



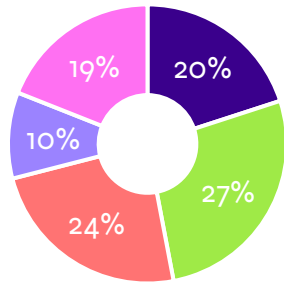
Share of News &
Content Time
(Online & Offline)



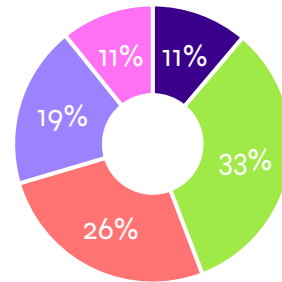
Share of
Total Media Time



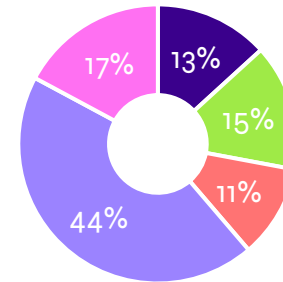
Share of Social
Media Time



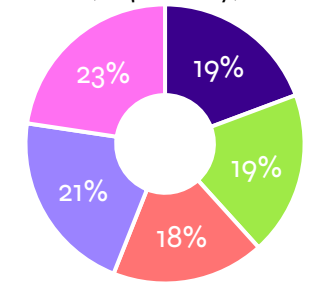
Share of
Digital Video Time



Share of
Digital Audio Time



Share of News &
Content Time
(Digital Only)

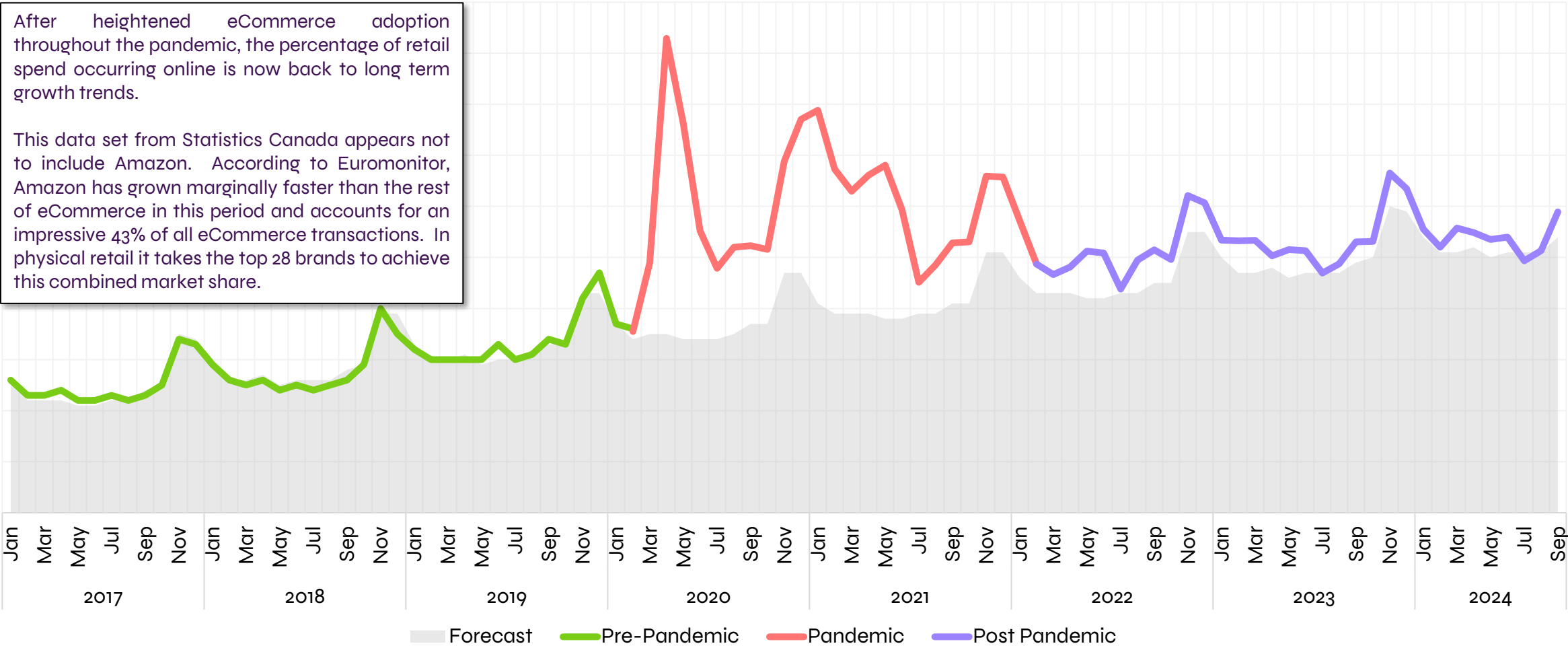


Ecommerce Usage is Back on Long Term Growth Trends

Share of Retail Sales Occurring Online (Statistics Canada Data)

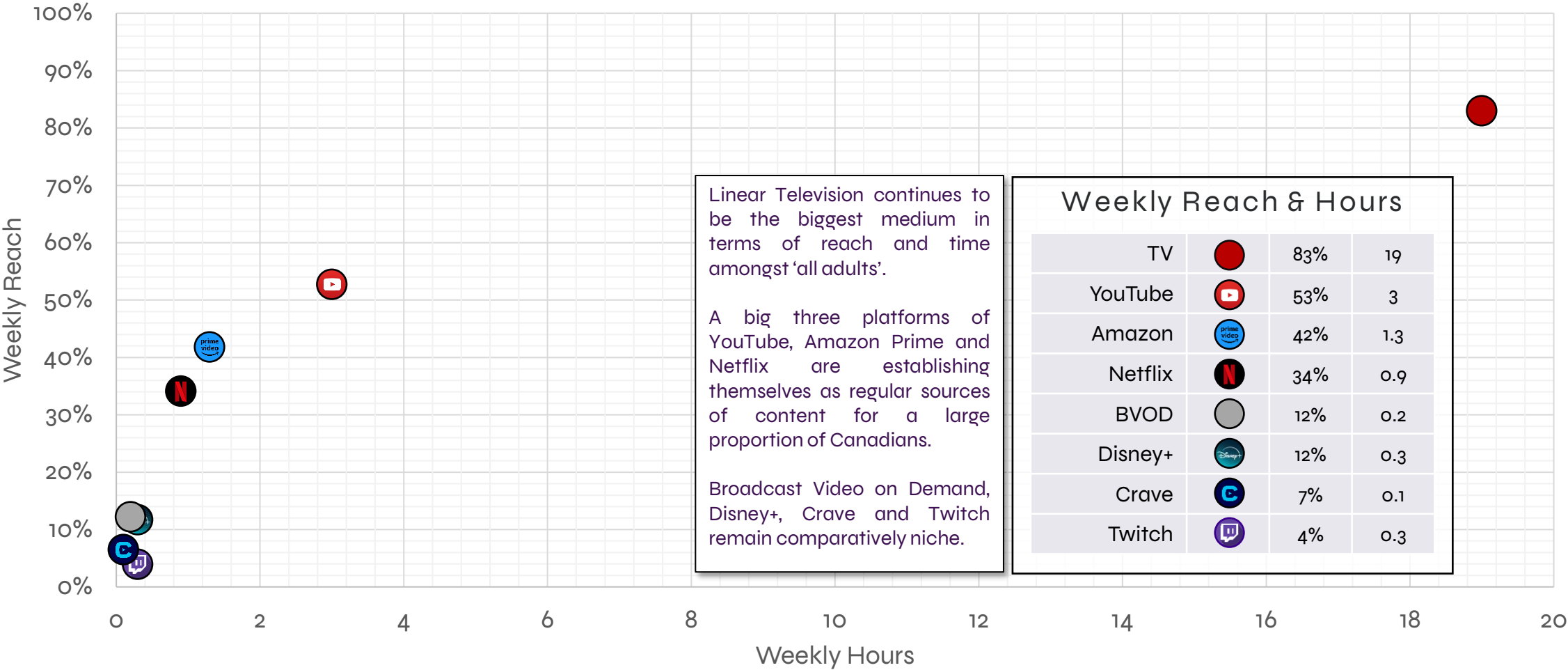
After heightened eCommerce adoption throughout the pandemic, the percentage of retail spend occurring online is now back to long term growth trends.

This data set from Statistics Canada appears not to include Amazon. According to Euromonitor, Amazon has grown marginally faster than the rest of eCommerce in this period and accounts for an impressive 43% of all eCommerce transactions. In physical retail it takes the top 28 brands to achieve this combined market share.



Source: Statistics Canada, Euromonitor

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

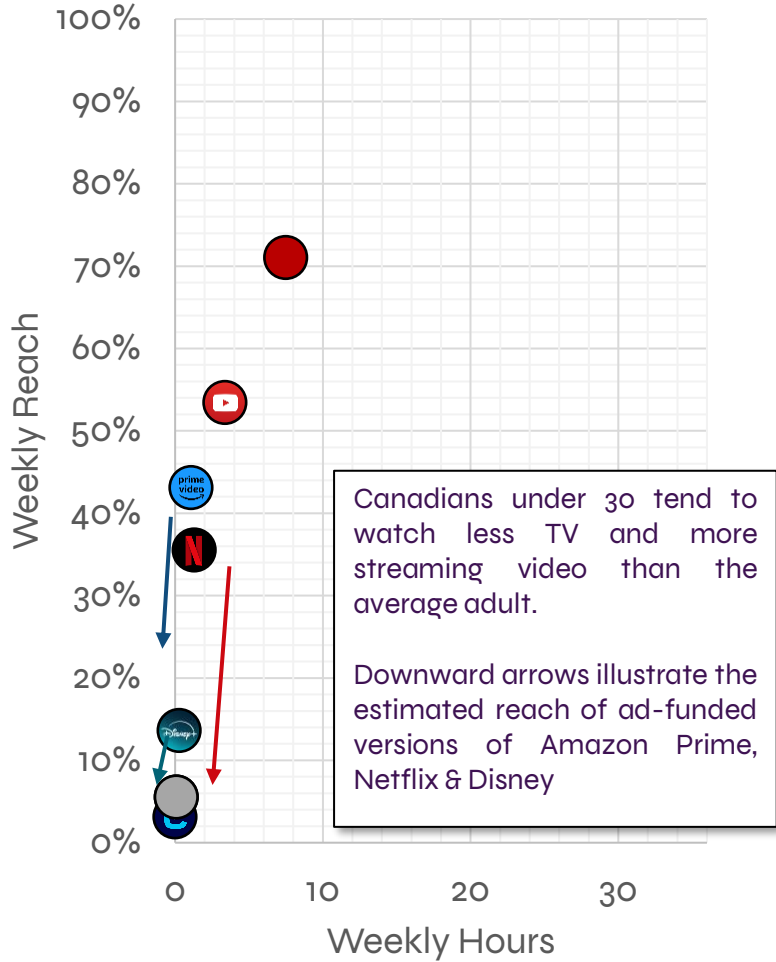


Source: Numeris PPM TV, VAM, Vividata Metrica, PHD estimates from multiple industry sources

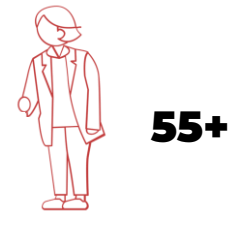
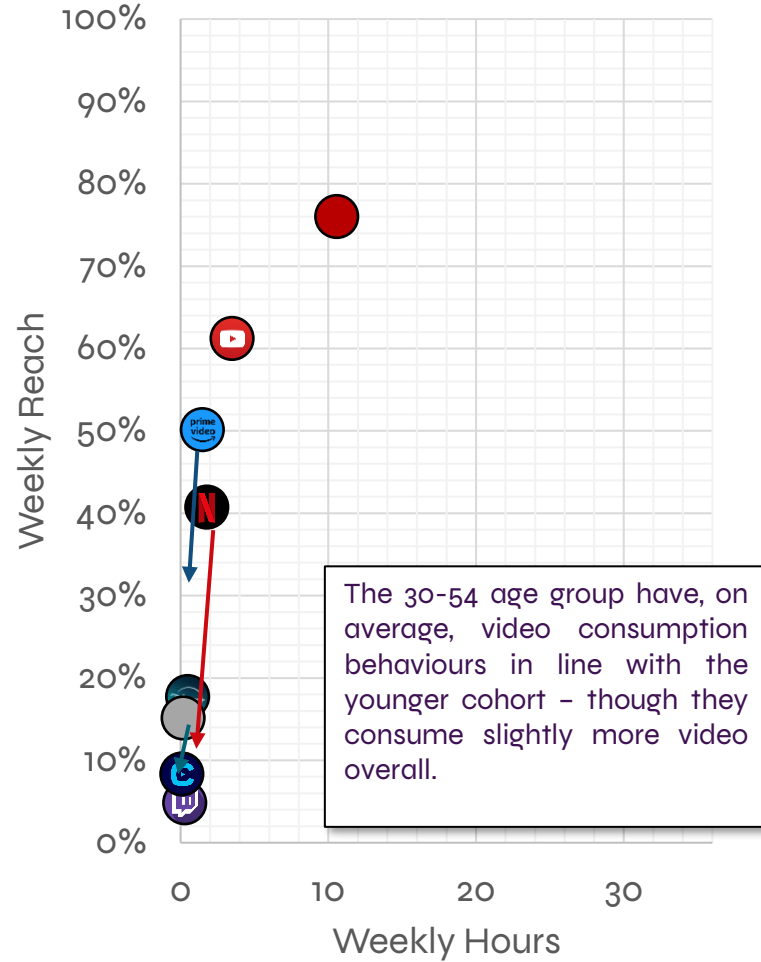
Video Preferences by Age



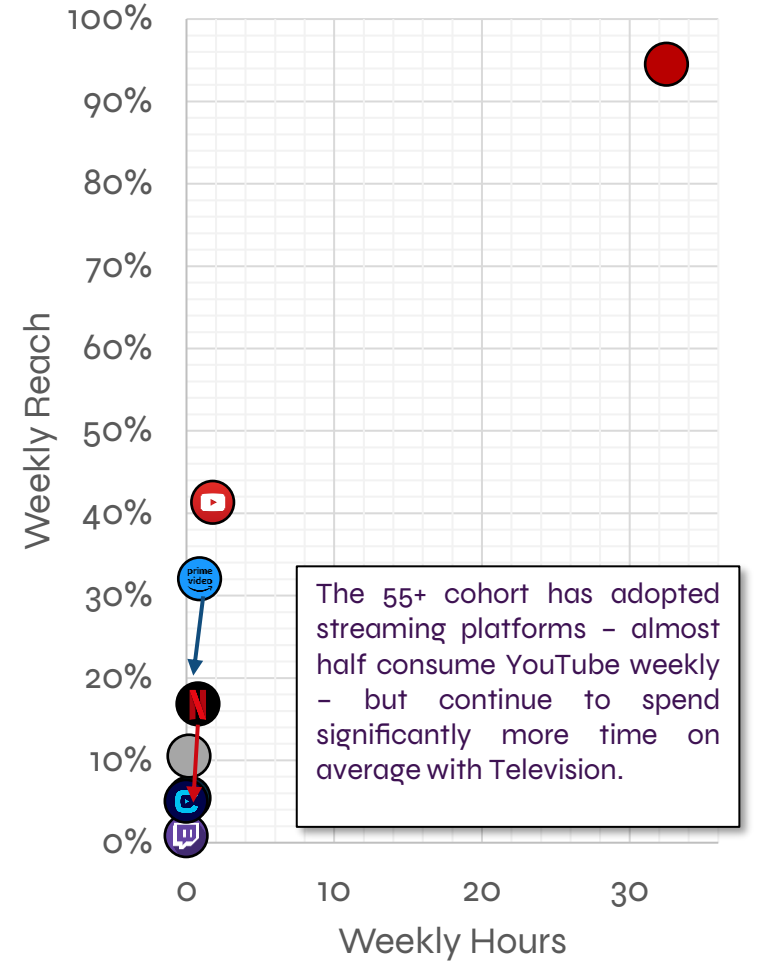
Under 30



30-54



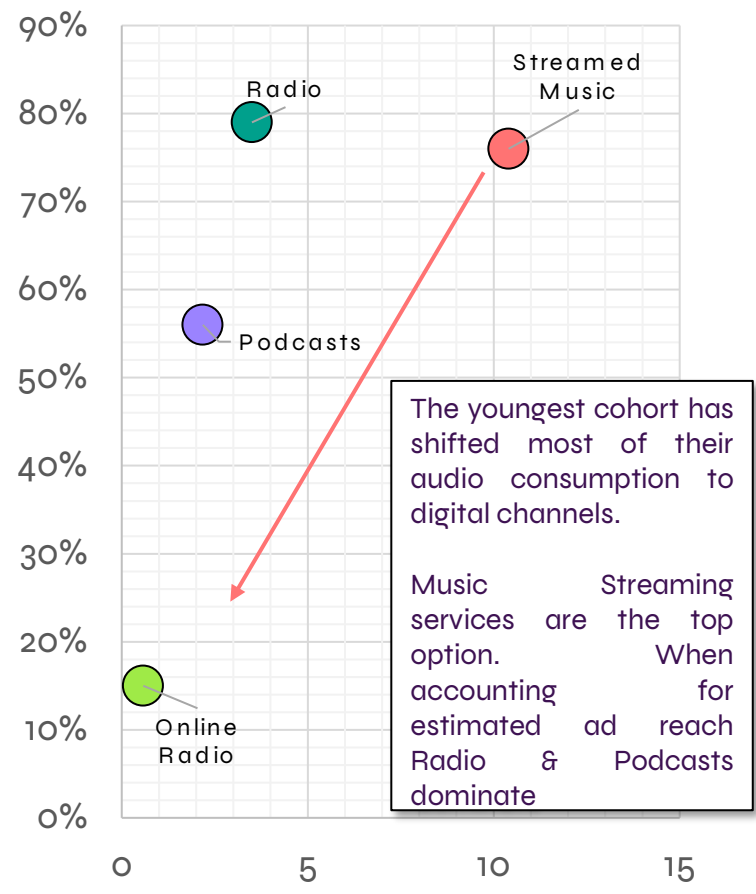
55+



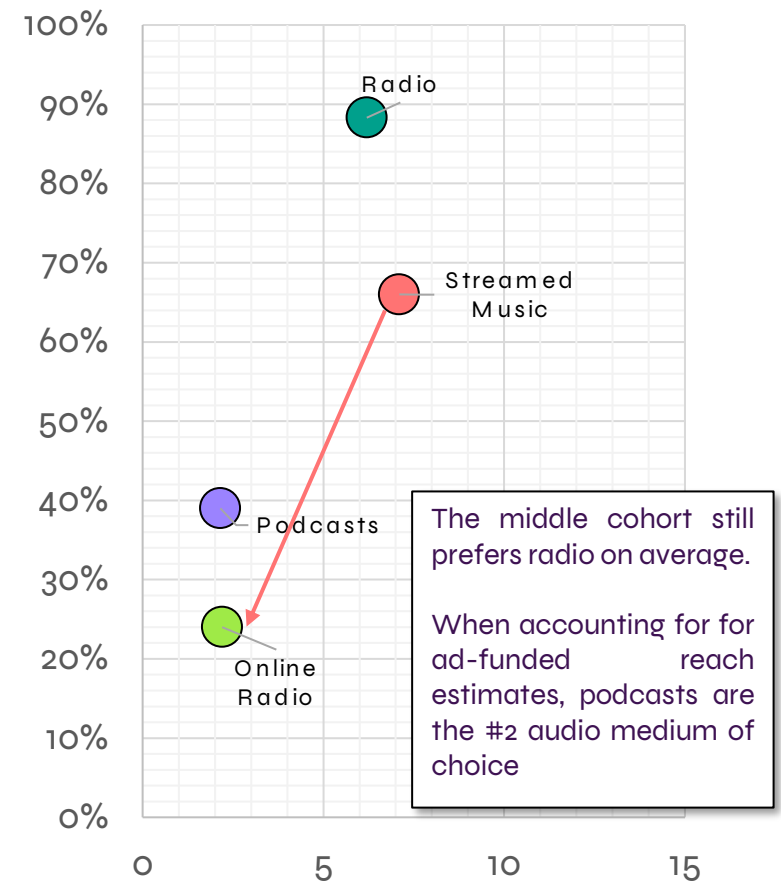
Audio Preferences by Age



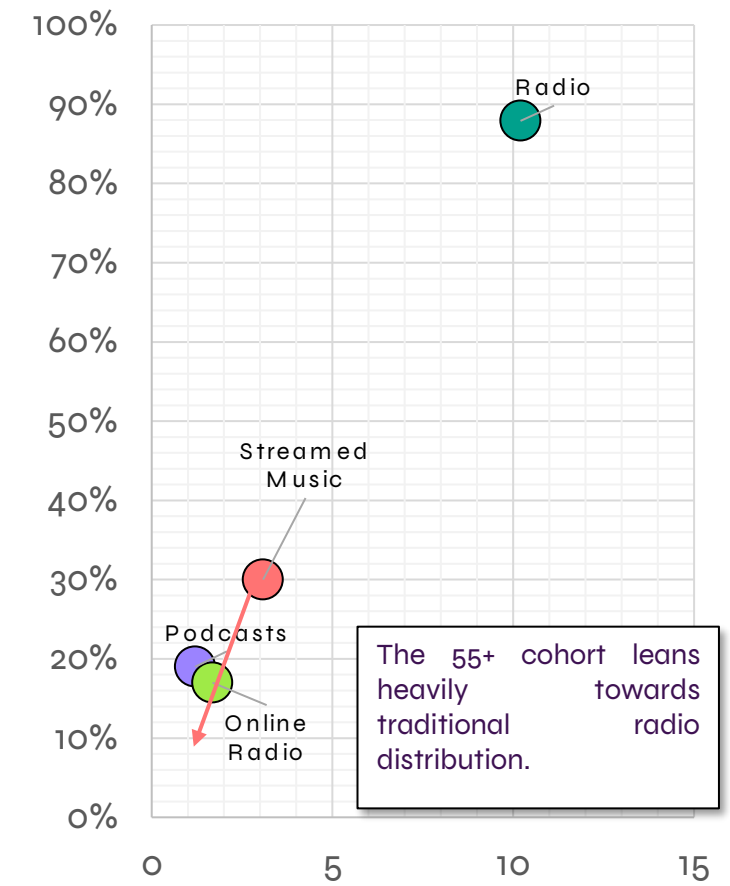
Under 30



30-54



55+

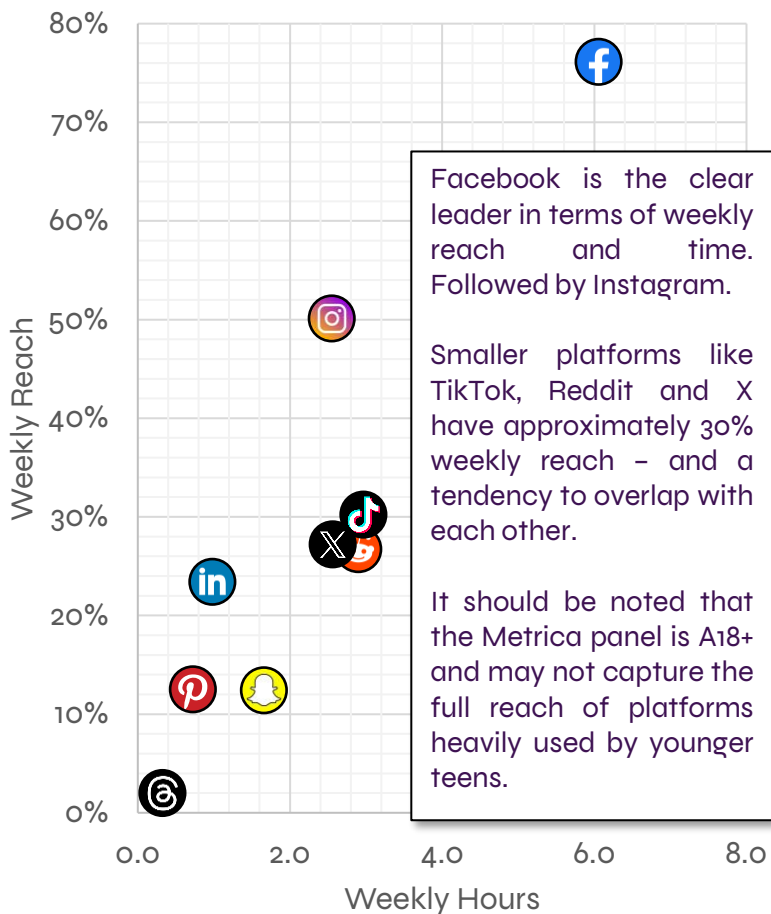


Source: Numeris PPM Radio, MTM Spring 2023, PHD estimates from multiple industry sources.

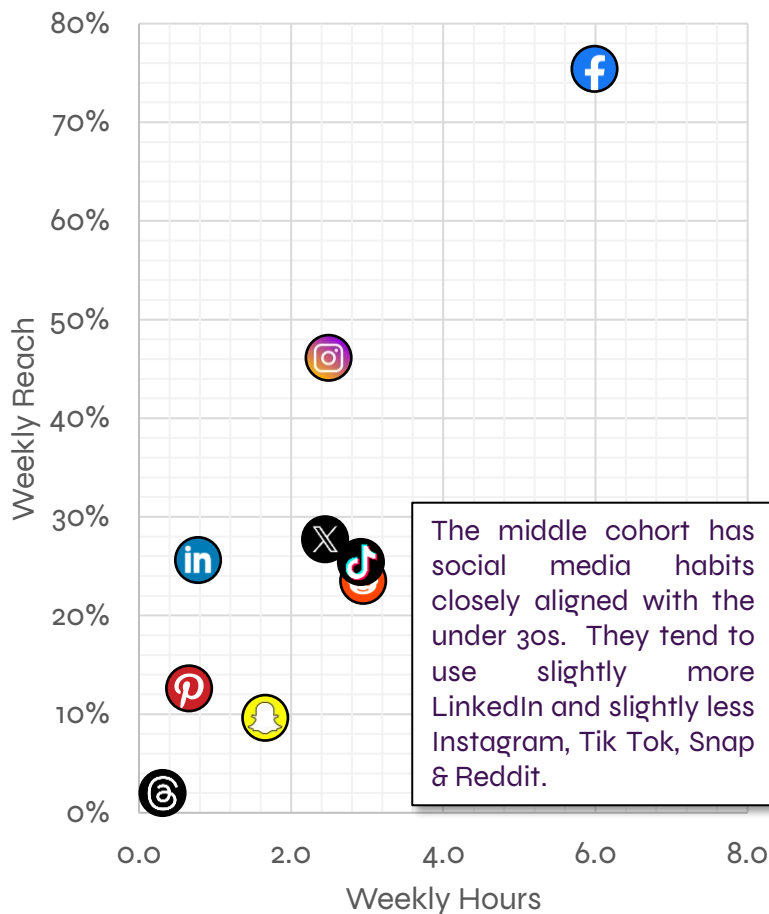
Social Preferences by Age



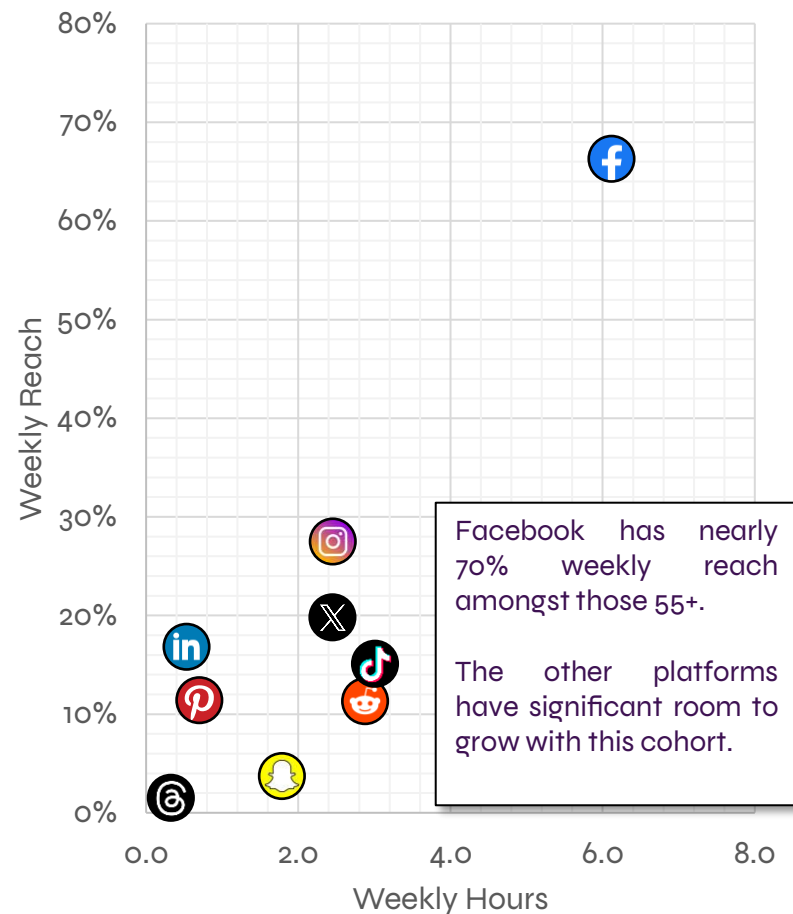
Under 30



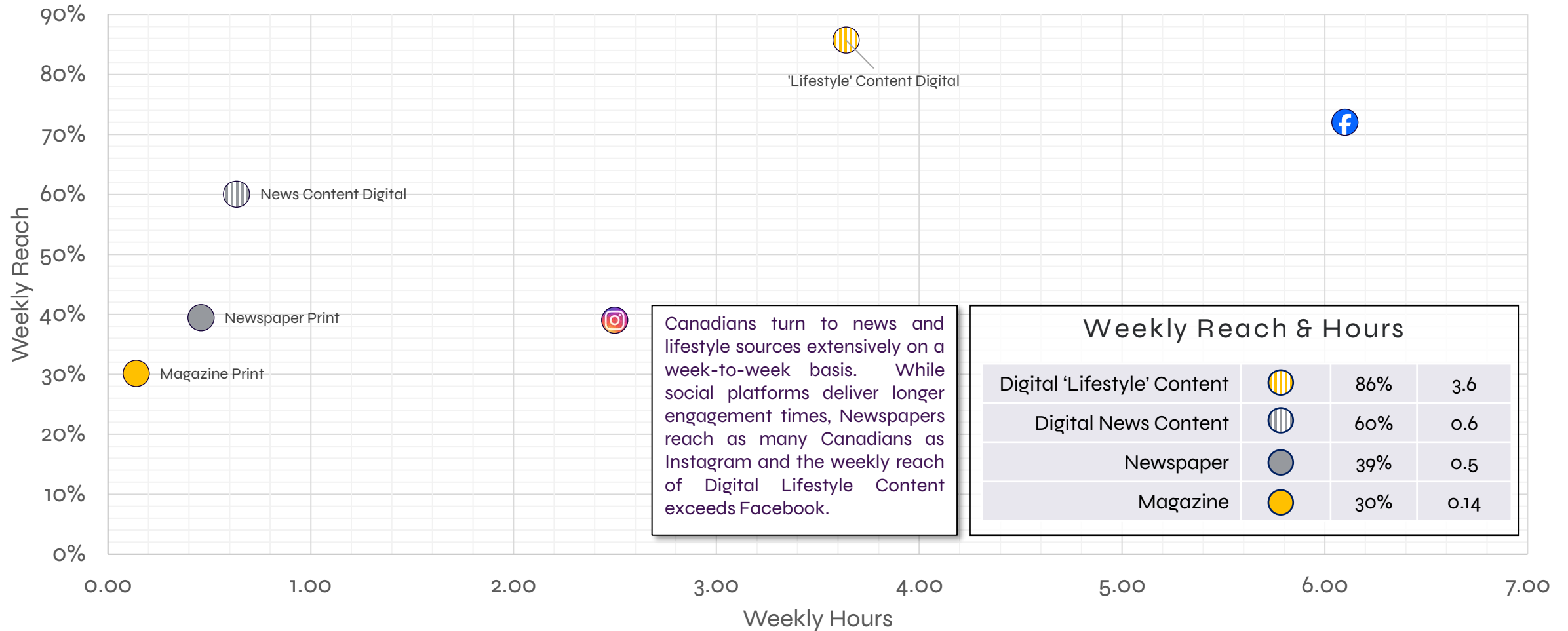
30-54



55+

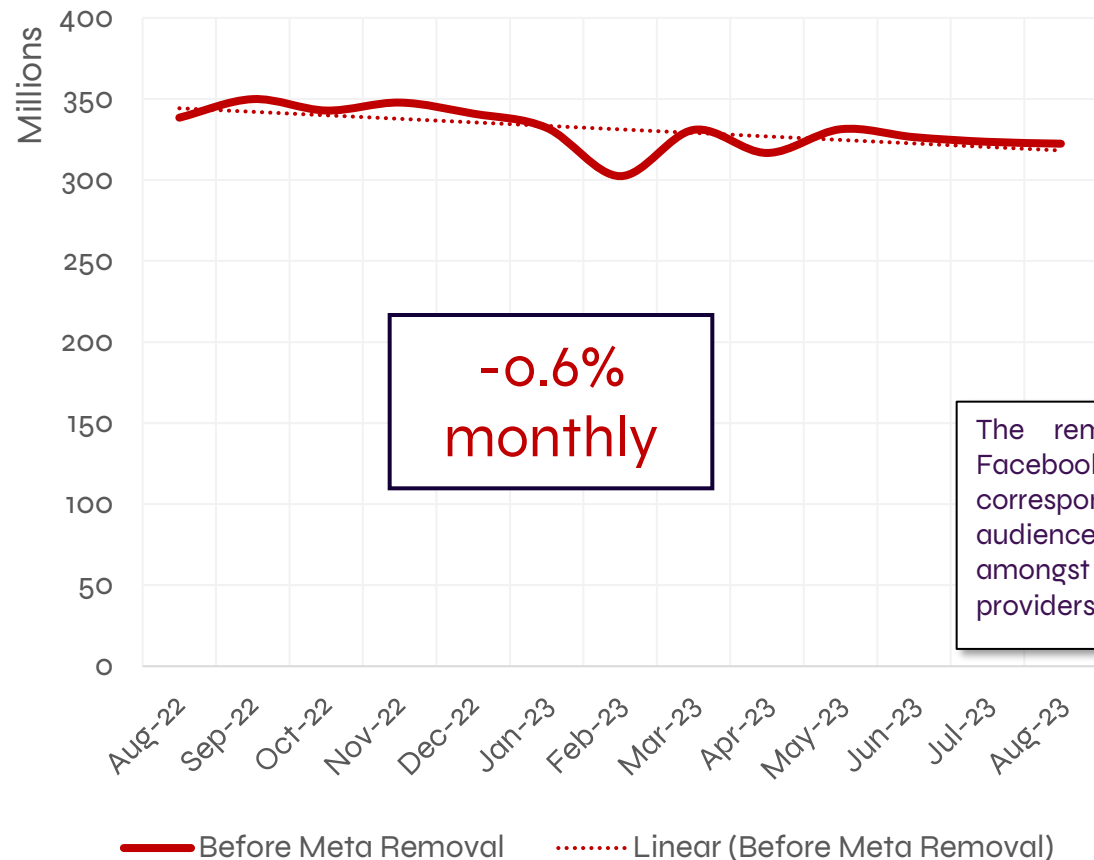


News & Content have comparable reach but less time than leading socials

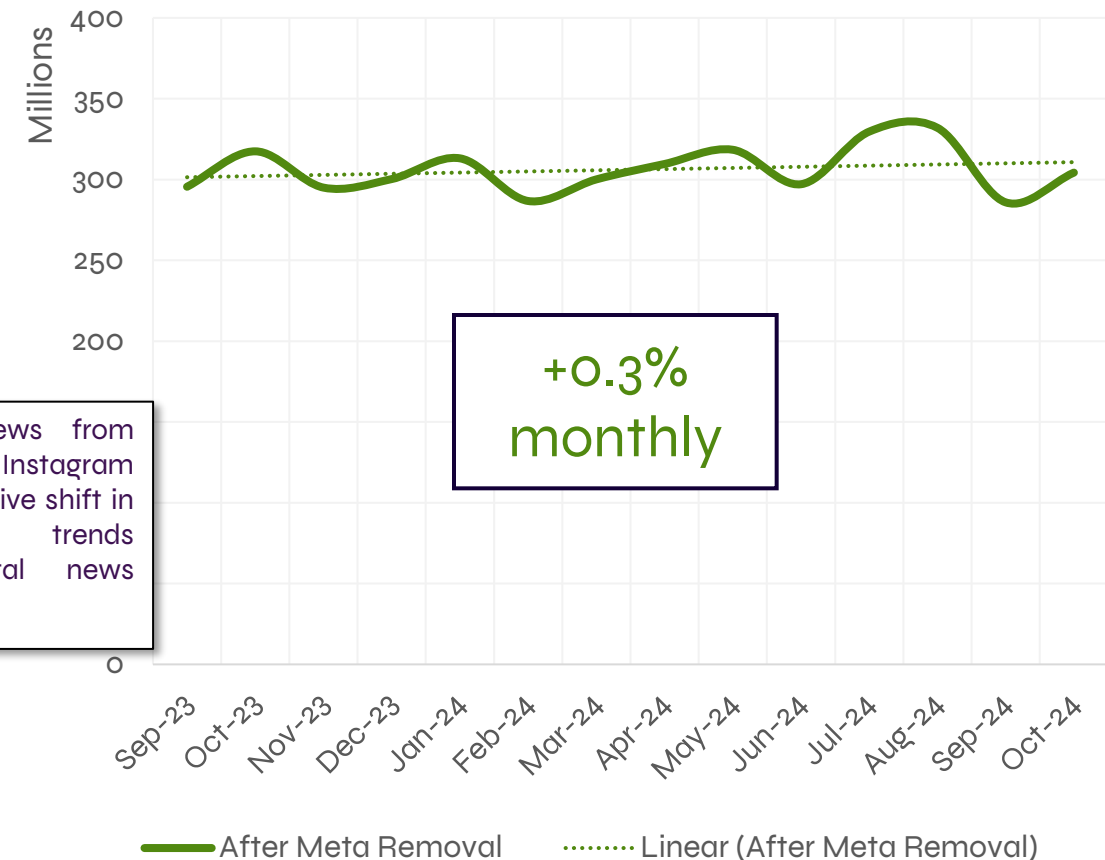


News Consumption Appears to have Stabilized Post Meta Removal

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



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



The removal of news from Facebook and Instagram corresponds to a positive shift in audience visitation trends amongst 150 digital news providers in Canada.