



Barometer Report: **Made In Canada**

February 2021

A Deep Dive into Domestic Media

The State of Domestic Media in Canada

- Steady trending of flat / decline in growth
 - Actual Internet revenues of domestic Canadian Publishers dropped 12% from \$1 billion (\$999 mil.) in 2018, down to \$0.9 billion (\$879 mil.) in 2019, half of the decline attributed to one leading Canadian publisher.
 - Canadian Publishers' share of Total Canada Internet dollars contracted from 13% down to 10% - share of Total Programmatic remained stable (11%), with Programmatic Direct much more prevalent among Canadian Publishers, than the industry.
- Covid-19 and other 2020 news stories highlighted the delta between impressions and monetization
 - Almost 50% Increase in time spent while over 50% report blocking
- Brand Safety policies are often broad and categorical
- Exploring the importance supporting Canada has on the media buying community through 360 studies
- Global developments – Australia, EU etc.

Source:

- IAB Canada Revenue Survey 2019/20
- Comscore The Coronavirus Pandemic in Canada: The Next Evolution of Media Consumption 2020
- IAB Canada Barometer Report Waves 1-4 Covid-19 Impact 2020

IAB Canada Barometer Report: **Made in Canada 2021**



Made in Canada Barometer Report

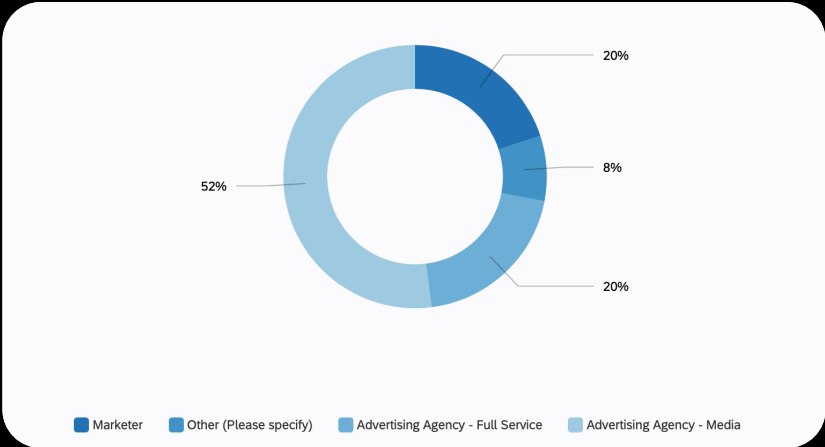
IAB Canada Buy-Side Member Survey

- Marketer & Agency Survey
- Sentiment around buying Canadian
- Estimated expenditures 2020/21
- Policies
- Priorities for making buying decisions
- Looking Forward on the issue



Barometer Respondents

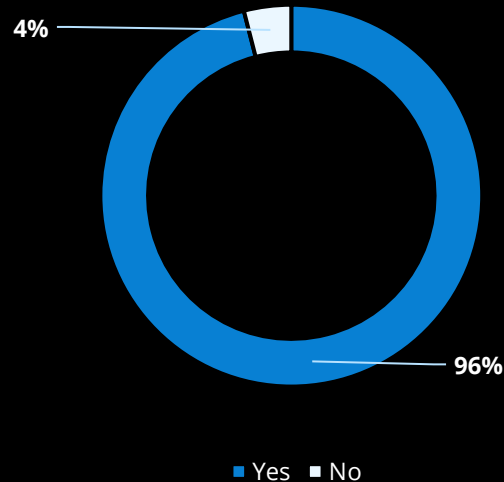
72% Respondents Represent Several Brands as **Agencies** – 20% Marketers
Direct 84% Decision Makers/Strategy Planners



Policy on Canadian Media Investments

An overwhelming majority (96%) of buyers report no policies for domestic expenditure levels.

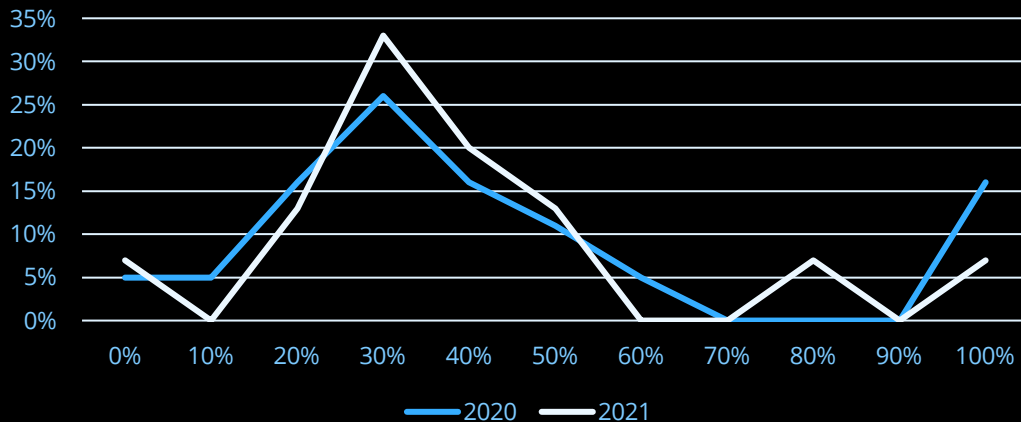
Policy on Investing in Domestic Media



Est. Levels of Expenditure in Canadian Media - Display

An uptick in planned Display expenditure for 2021

Digital Display – Est. Canadian Expenditure



79% plan to spend between 20-50% of budget on Canadian Display - up 10% from 2020

- 1/3 of respondents estimate around 30% investment in Canadian Display

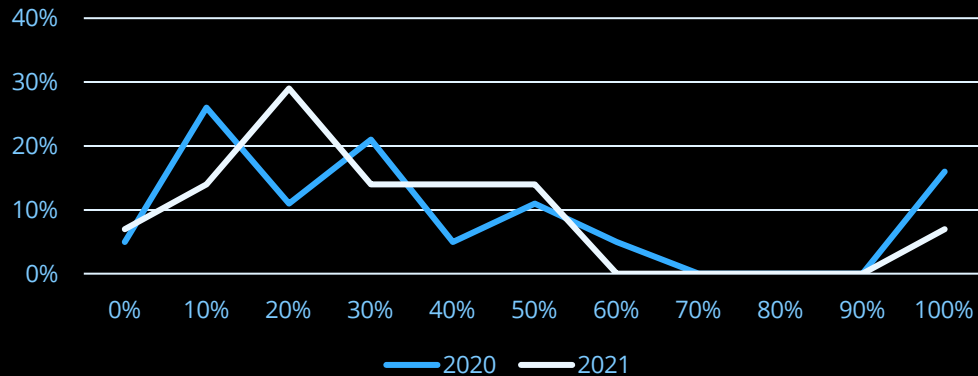
*all respondents excluding "don't know responses"



Est. Levels of Expenditure in Canadian Media - Video

Canadian Video sees a major increase in domestic investment

Digital Video - Canadian Est. Expenditure



71% plan to spend between 20-50% of budget on Canadian Video - up 41% from 2020

- 30% estimate 20% investment in Canadian video

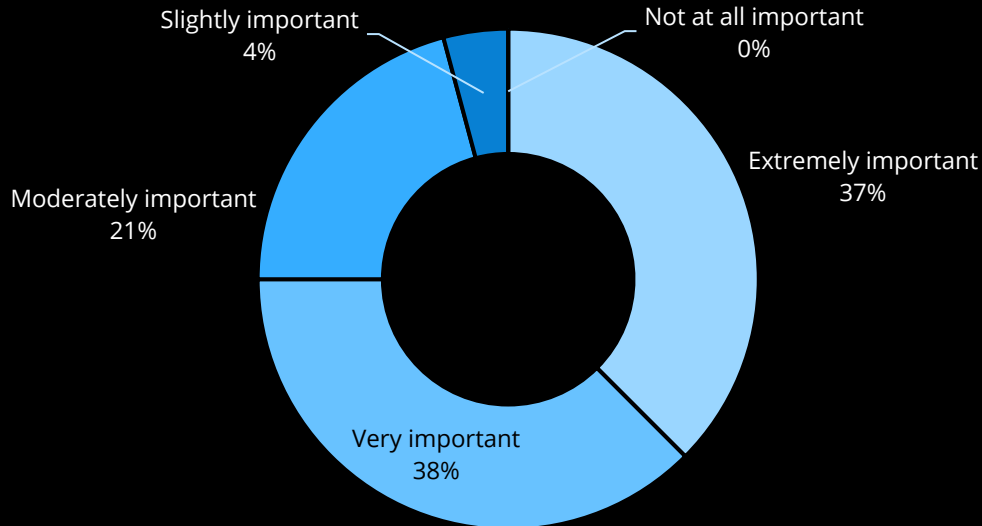
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How Important is it to Support Canadian Digital Media?

75% of respondents state that supporting Canadian digital media is very/extremely important to them personally.

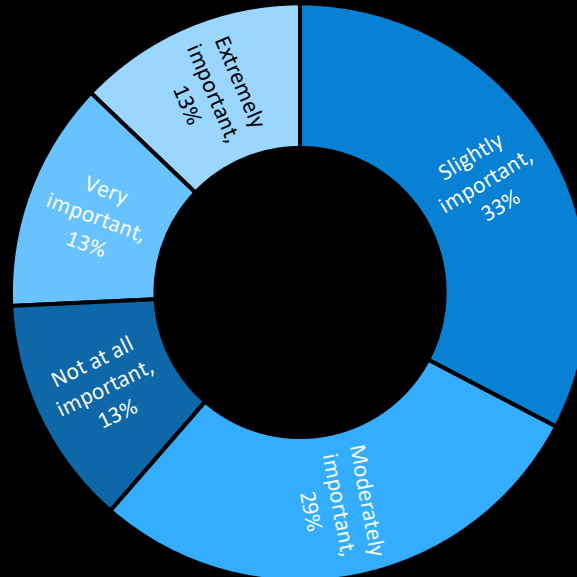
How important is it to you **personally** to support Canadian digital media?



How Important is it to Support Canadian Digital Media?

Conversely, **only 26%** say it is extremely/very important to brands or clients – a third stating “slightly important” and 13% “not at all”.

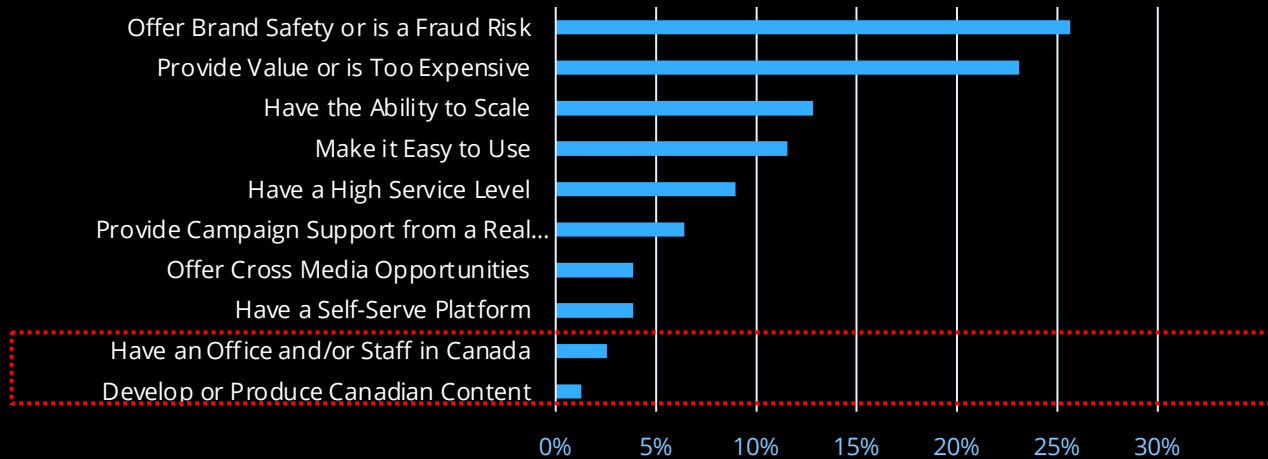
How important is it to your **brand or client** to support Canadian digital media?



Security, Value & Scale are Top Media Attributes

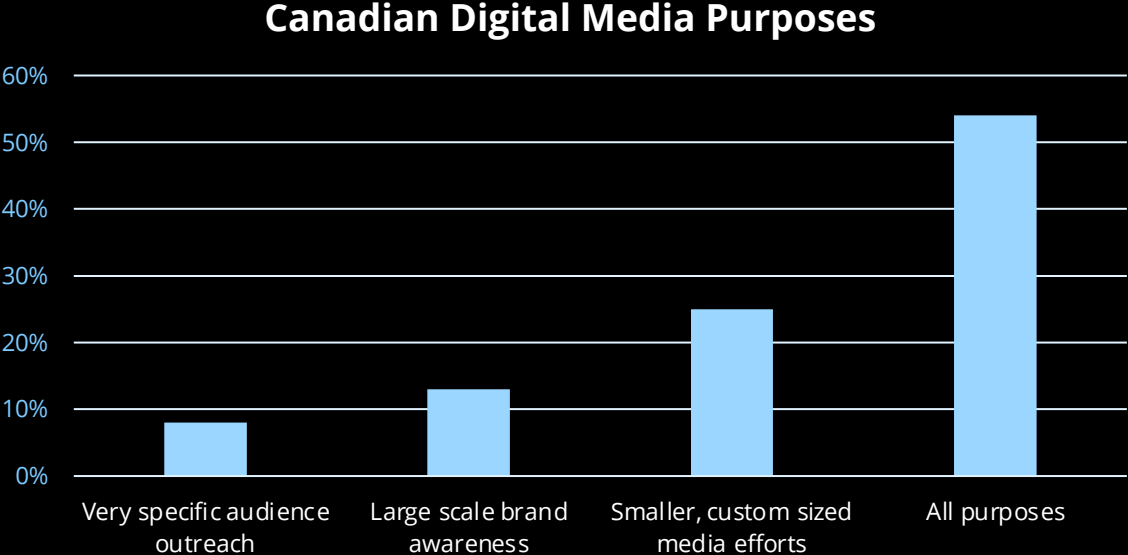
Domestic considerations fall to the bottom while media value stays at the top.

Deal Breakers - Key Attributes for Investment



Multi-Purpose Consideration – Associated with Smaller/Custom Efforts

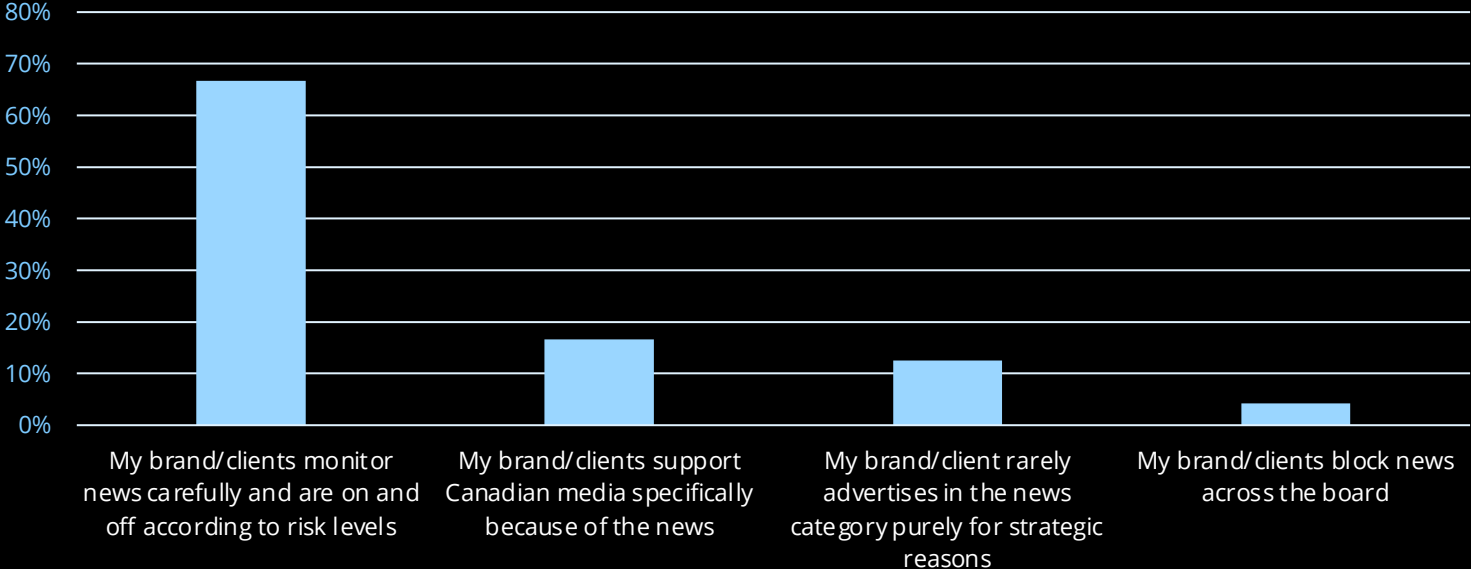
25% consider Canadian media for smaller, custom efforts.



Brands are "Watching" the News

Almost 70% monitor news for risk levels – 15% support news regardless

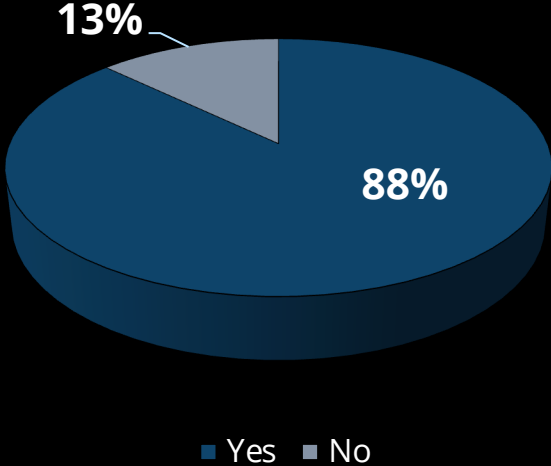
How have Recent News Stories Affected Investment in Canadian News Media



Domestic Media as Corporate Social Responsibility

88% believe global brands should support domestic media markets

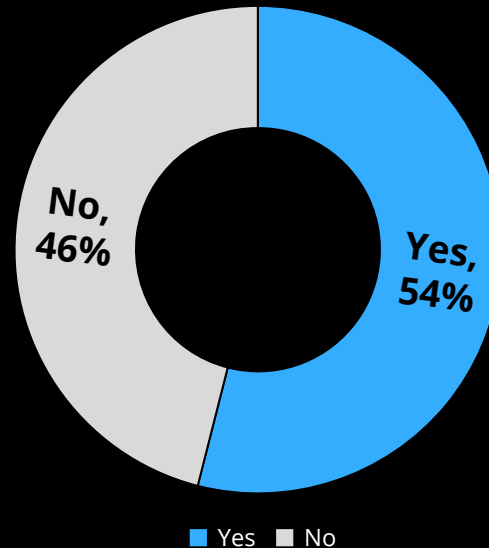
Should global brands make concerted efforts to support regionalized markets by investing in domestic media channels as a priority?



Increased Relevance for Domestic Media

Over 50% feel Canadian Media will become more relevant in the near term

In your opinion, do you feel that Canadian media will become more relevant to advertisers in the coming months and years?



Advice to Canadian Media Publishers

Scale & Justification of Value



Summary of Findings

Support for Domestic Media in Canada

- While buying “Made in Canada” media is top of mind for individuals, brands are less concerned with supporting domestic
- Security, Scale and Value are top media attributes
- Almost 80% plan to spend 20-50% of their display budgets on Canadian media
- Canadian media is used for all purposes but is still associated with smaller custom buys
- Domestic media as Corporate Social Responsibility – 88% believe that global brands should commit to supporting domestic media
- Just over half believe that domestic media will become more relevant in the near term



Thank you for Supporting IAB Canada

Powerful Digital Leadership

