

A person in a dark jacket and hat stands on a rocky outcrop, looking out at a vast, starry night sky. The sky is a deep blue and purple, filled with numerous bright stars and a soft, glowing nebula. The overall mood is contemplative and serene.

CMUST

2021

Canadian Media Usage Study 2021

30 November 2021

phd

What's CMUST?

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

The study documents consumers' changing media consumption across as media digital technologies increasingly impact Canadians.

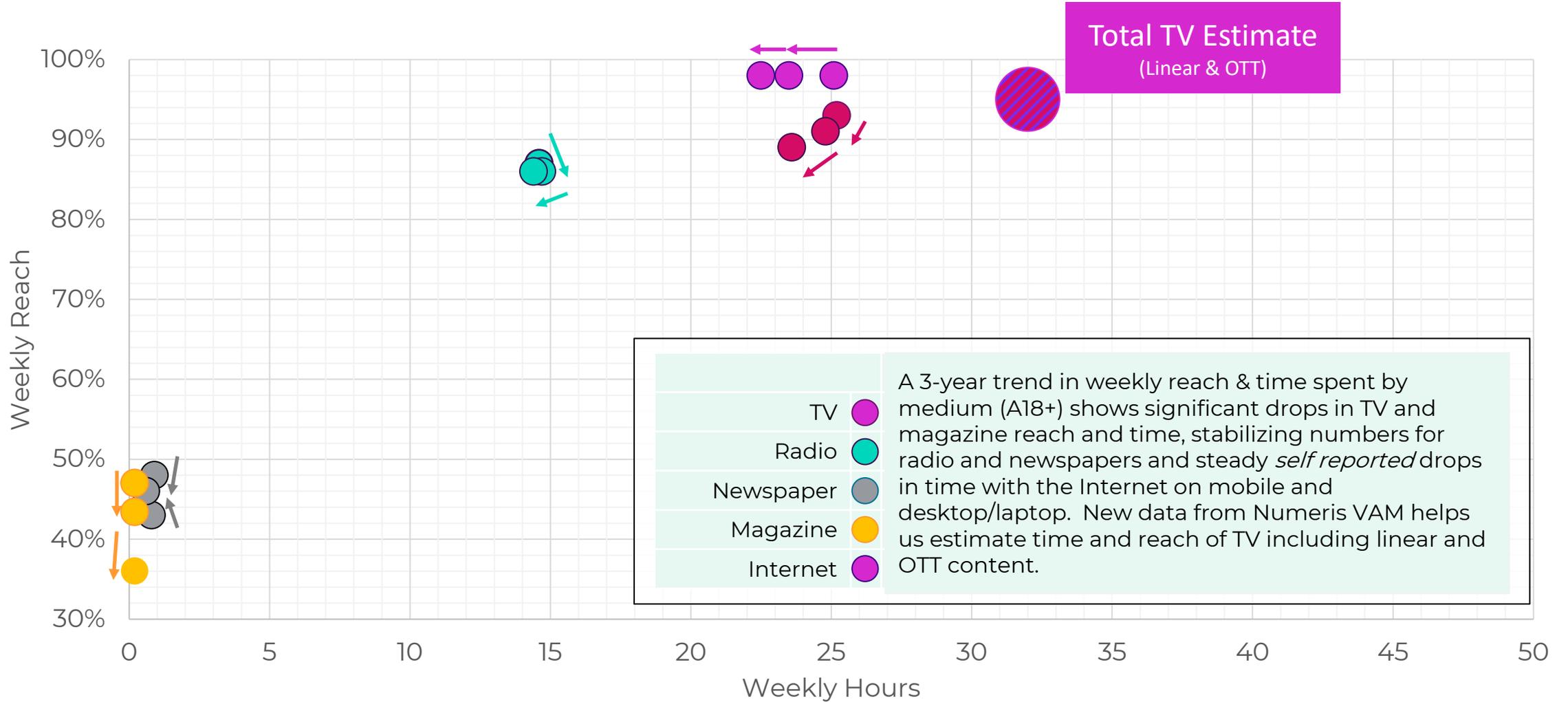
This year's study updates trends on overall media usage and device penetration trends. Using new data from Vividata Metrica and Numeris VAM projects has allowed a richer understanding of the some of the mobile and smart TV habits that have been hard to quantify in recent years.

The document trends media habits through the phases of the pandemic to date – including some hints that our focused attention is dwindling rapidly.

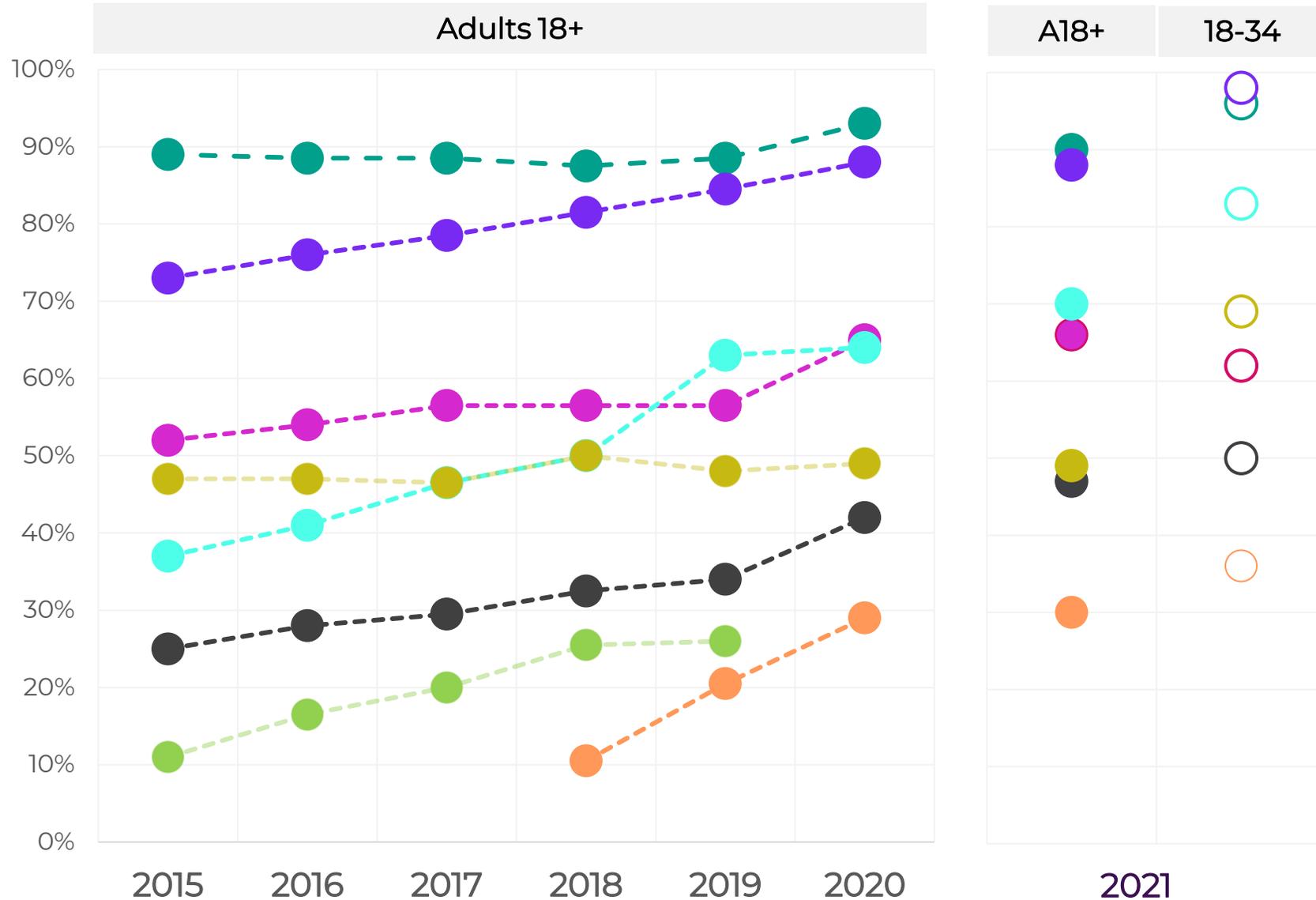
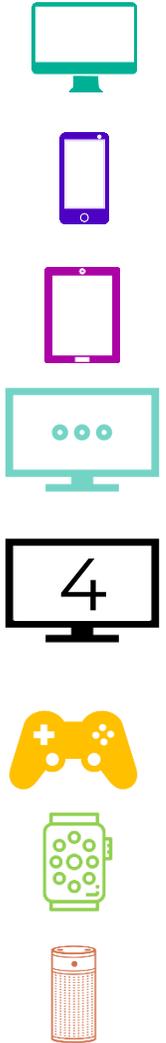
With the rising importance of Walled Gardens in terms of consumer time and transactional considerations (i.e. data, measurement, etc...) we have, for the first time, mapped their weekly reach and time.

Given the pressing need to address climate change, we've also provided some perspective on the direct and indirect carbon footprints of the media that is bought and sold in Canada.

The last 3 years: accelerating trends



Device Penetration



There were significant increases for several devices in 2020/21 – possibly in part due to a methodology adjustment to the survey to navigate the pandemic.

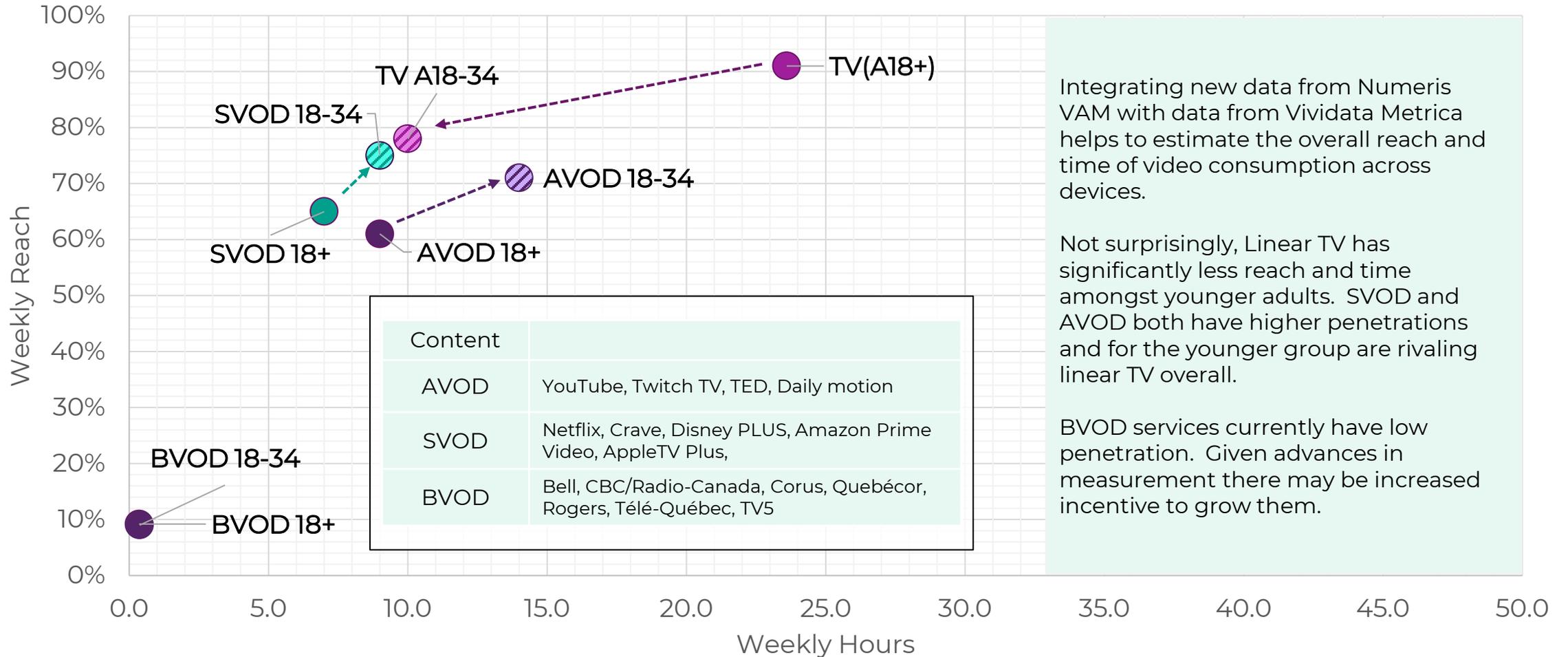
Tablets and PCs both saw increases.

Smart TVs saw marked growth in 2019 and are surprisingly strong amongst younger adults as well.

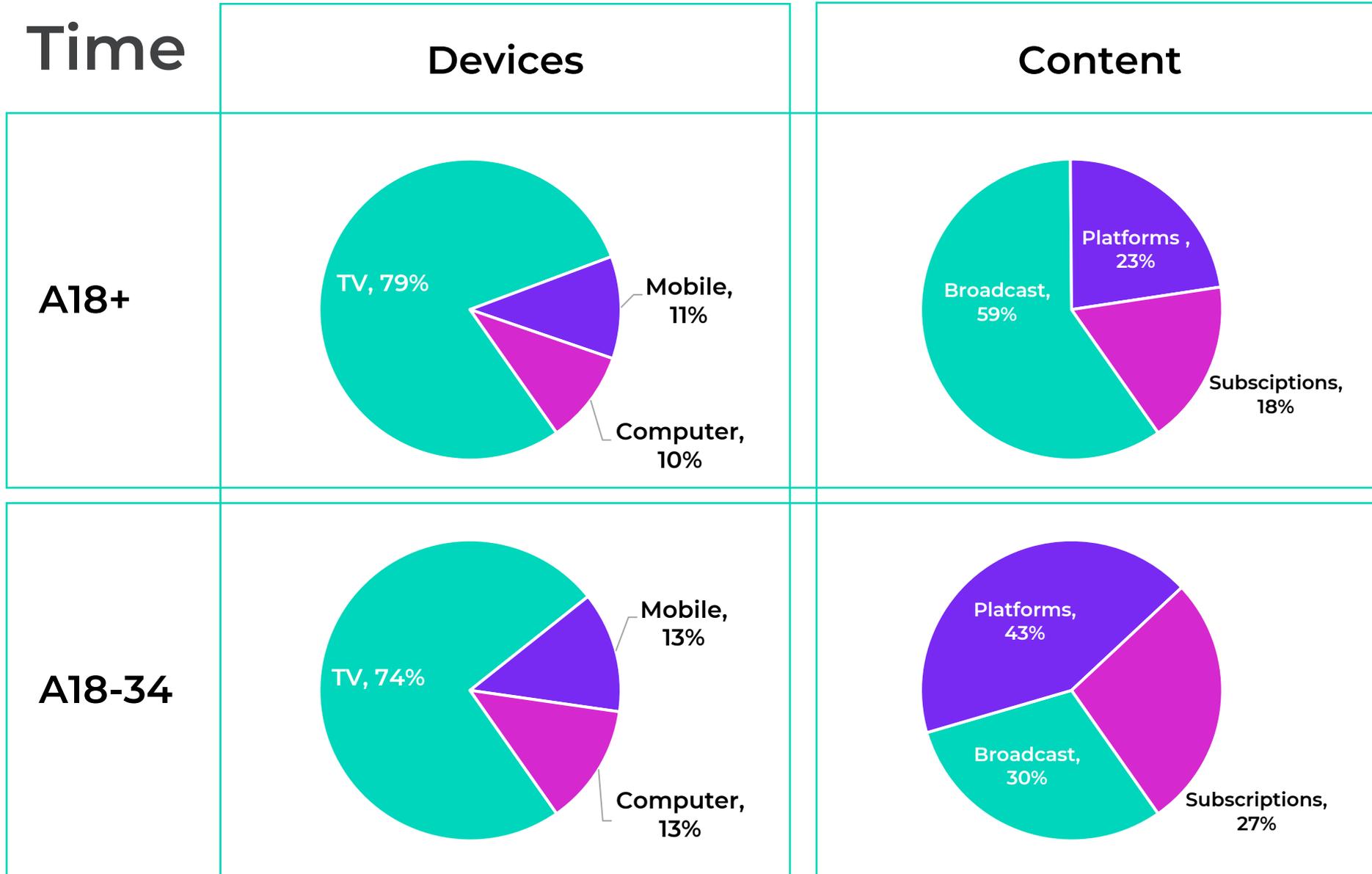
New gaming systems have not lead to significant increases in household penetration

Sources: MTM Spring 2020, Fall 2020 and Spring 2021

Video habits are evolving rapidly



Share of Video Time



Adults 18+ and younger adults have surprisingly similar habits in terms of devices for video viewing.

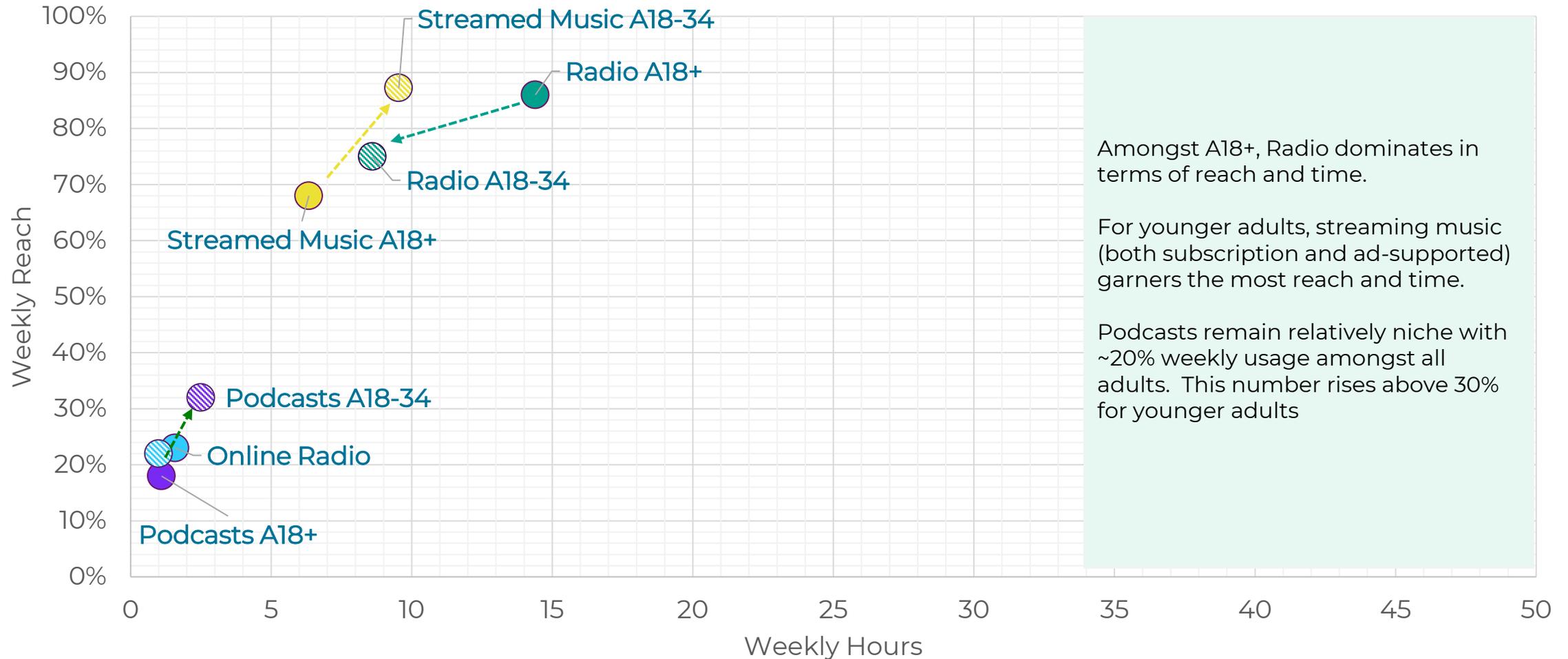
TV (the device 'on the wall') dominates for both groups.

The sources of content, however, vary dramatically. Broadcast TV dominates amongst A18+ (given it's strong performance particularly amongst A55+).

Platforms (AVOD) and Subscriptions (SVOD) dominate for younger adults.

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

Generational differences in Audio mirror video



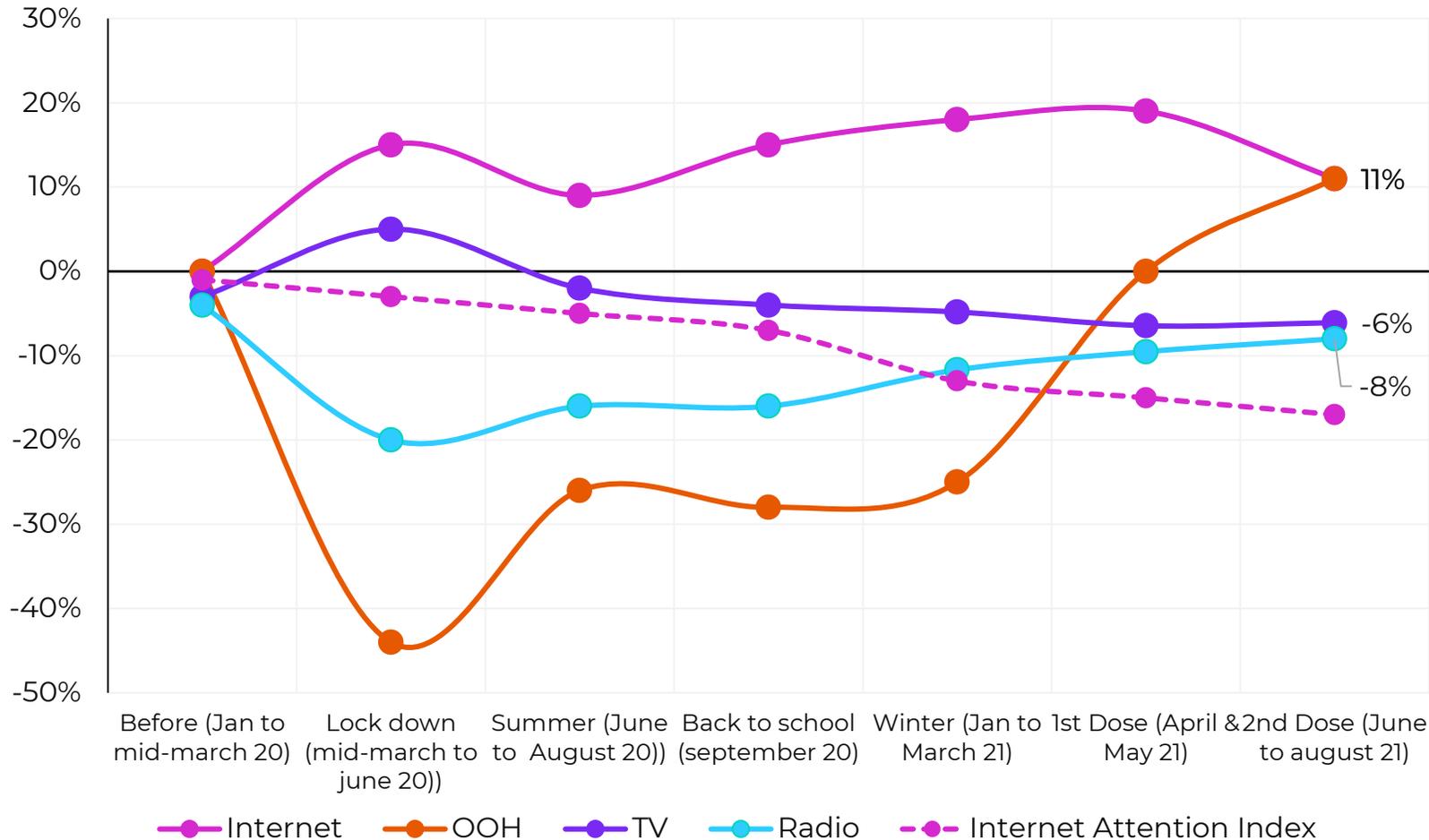
Amongst A18+, Radio dominates in terms of reach and time.

For younger adults, streaming music (both subscription and ad-supported) garners the most reach and time.

Podcasts remain relatively niche with ~20% weekly usage amongst all adults. This number rises above 30% for younger adults

Source: Numeris PPM Radio, MTM Spring 2021, PHD estimates from multiple industry sources, Canadian Podcast Listener

The COVID Effect



The Pandemic has had a significant impact on media habits.

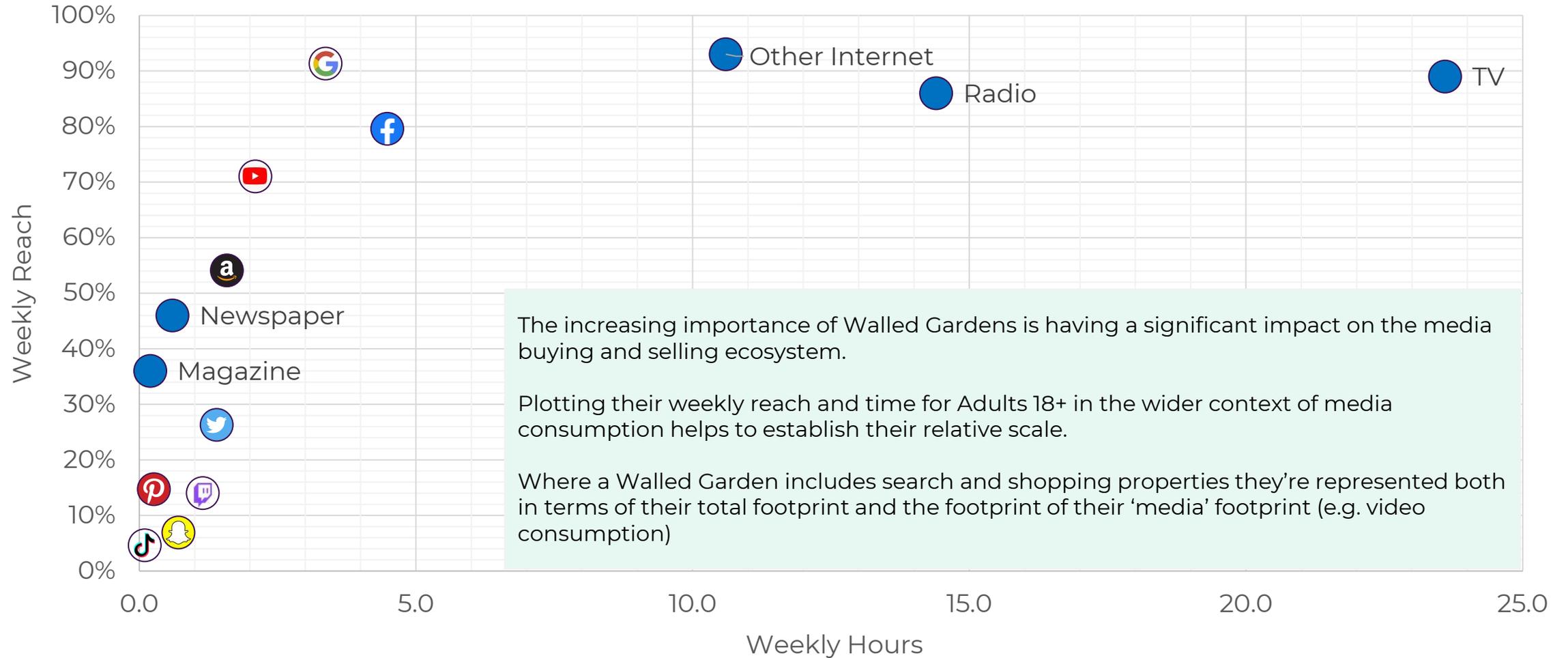
Relative to Q1 2020 only the internet has seen sustained increases in time spent.

After a short term lift, TV has seen slow-but-steady declines.

Media consumed partially or wholly out of home (e.g. radio and OOH) have seen dramatical drops. Summer 2021 saw OOH return to (non-seasonally adjusted) increases relative to pre-Pandemic.

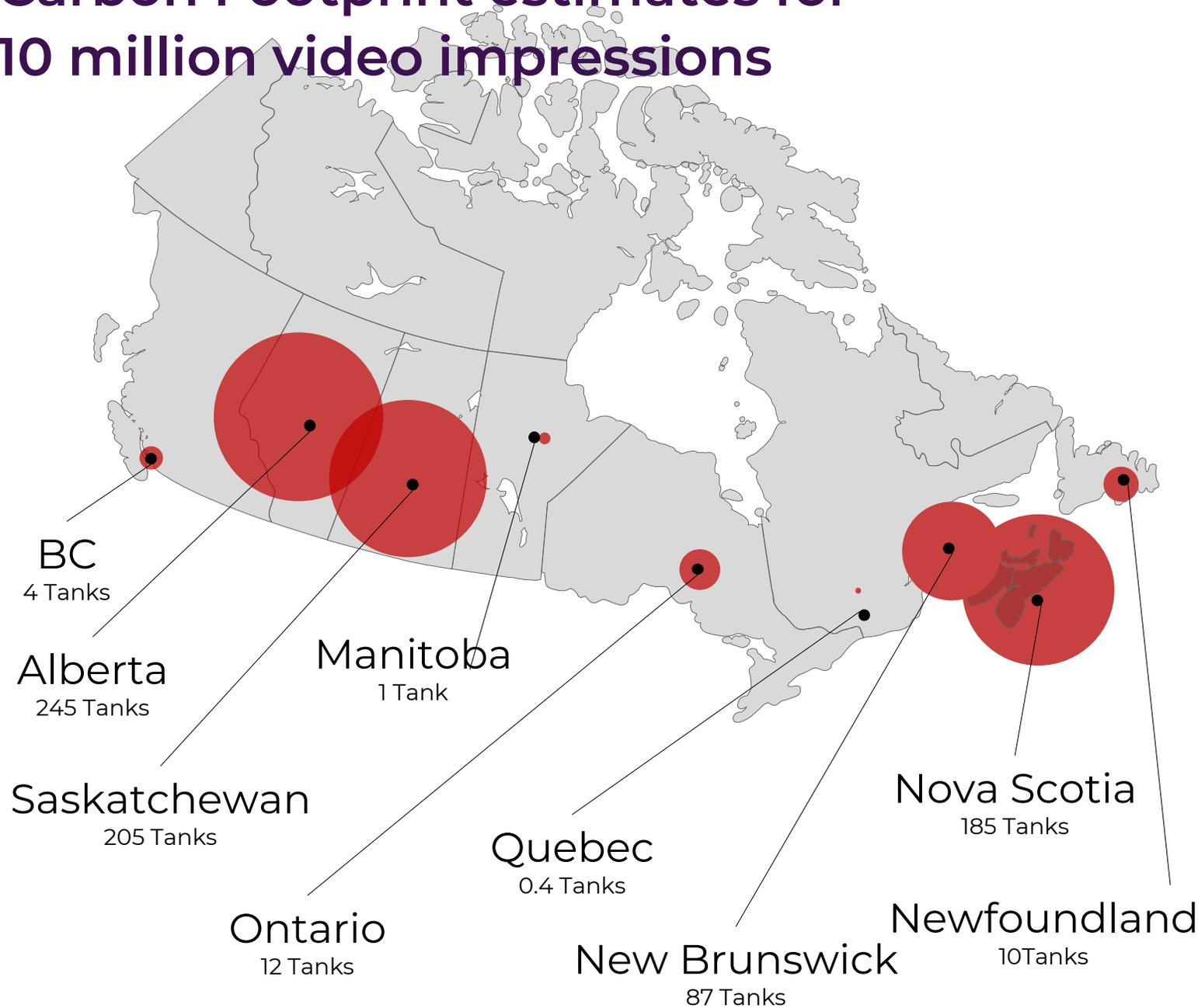
Internet Attention Index tracks an estimate of time spent relative to sites visited and suggests a steady decline in attention online (in spite of higher time spent and more sites visited)

Walled Gardens in Context



Source: Vividata Metrica Summer 2021, A18+

Carbon Footprint estimates for 10 million video impressions



Using a combination of sources, we've sought to contextualize the carbon footprint of 10 million video impressions in terms 'tanks of gas'.

The map highlights the large variation across provinces as a result of the relative carbon intensity of electrical grids.

The carbon impact of digital advertising can be reduced with – smaller file sizes, increased 'off peak' impressions and weighting delivery towards low carbon geographies like Quebec.

It's important to note that advertising is a key driver of consumer demand – with a much greater impact on carbon emissions than bandwidth alone. A [recent study](#) suggested that 28% of consumer emissions of UK residents were from advertising-generated demand.

The biggest gains for the climate cause are likely to come from brilliant advertising that creates consumer demand for green products.

If you'd like to learn more about the topic and the calculations the following sources may be useful - [Electricity usage](#) of internet bandwidth, provincial [differences](#) and estimated [equivalences](#).

Sources

Device penetration	MTM Fall 2020/ Spring 2021 unless indicated otherwise as PHD estimated.
TV weekly time/reach, 2020	Numeris, Fall'20/Spring'21 PPM averaged.
Radio weekly time/reach , 2020	Numeris, Fall'20, Diary
Internet weekly time/reach , 2020	Vividata Spring 2021
Magazine weekly time/reach , 2020	Vividata Spring 2021, generic question.
Newspaper weekly time/reach , 2020	Vividata Spring 2021, 72 daily rollup.
TV (Linear+OTT), weekly time/reach, 2020	Numeris Fall'20/Spring'21, Numeris Vam September , Vividata Metrica, PHD estimates
Online audio weekly time/reach	Numeris PPM Fall 2020
Podcast weekly time/reach and tuning dynamics	The Canadian Podcast Listener, Audience Insights Inc., Ulster Media.
Streamed music weekly time/reach	MTM Fall 2020/Spring 2021, reduced by PHD estimate of respondent over claim.
Video Reach/Time	MTM Fall2020/Spring 2021, Vividata Metrica, PHD estimates, Numeris PPM
Share of Video Time	Numeris PPM TV, VAM, PHD estimates from multiple industry sources, Vividata Metrica
Momentum	Compiled from sources used throughout document
Share of Ad Spend	Think TV compilation from multiple sources, IAB Canada Revenue Report, PHD estimates
eCommerce sales	Statistics Canada Table 20-10-0065-01 Retail trade, total sales and e-commerce sales
	Time spent as summarized in CMUST 2020