



# CMUST

Canadian Media Usage Study

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# 2023

## What's CMUST?

This is the 20<sup>th</sup> 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.

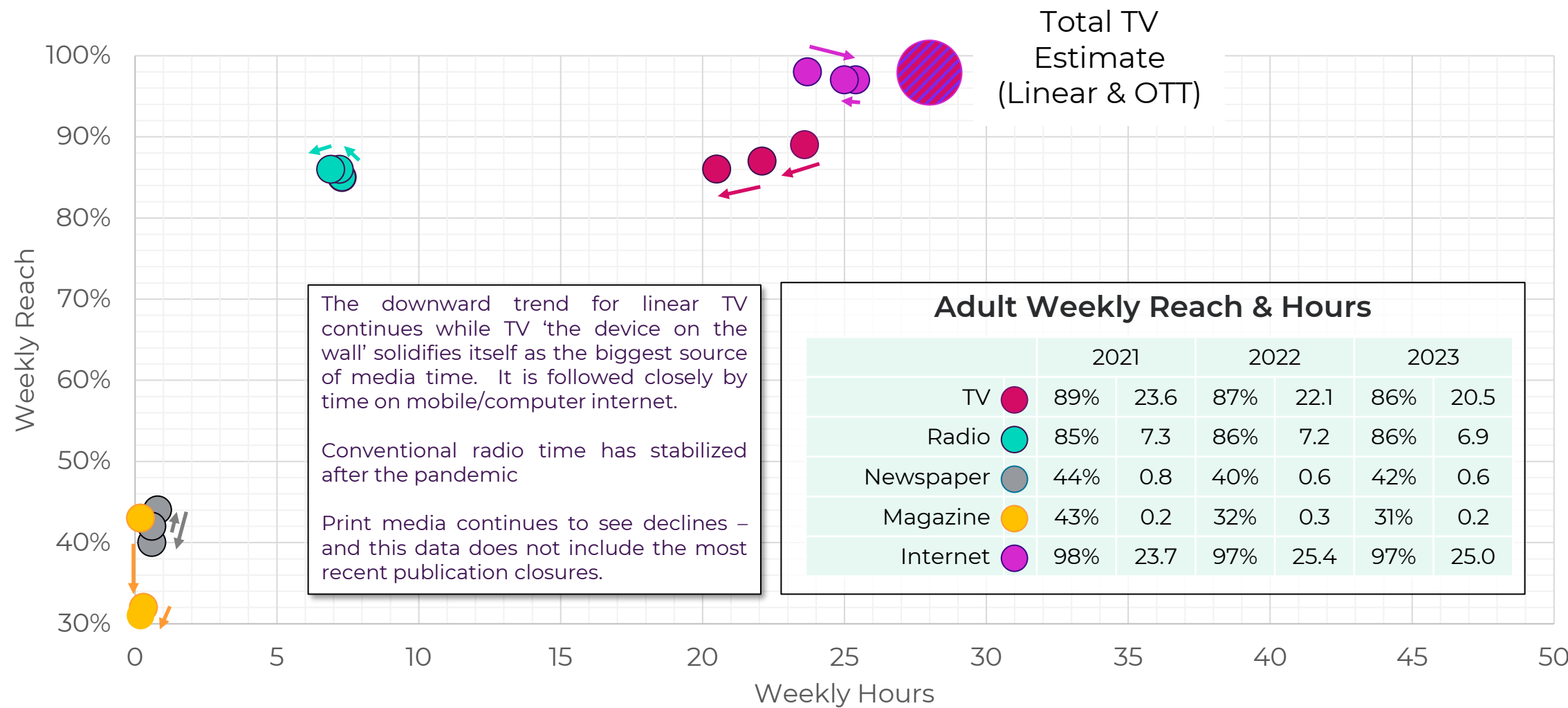
The study documents consumers' changing media consumption as digital technologies increasingly impact Canadians' habits.

2023 was the year that AI meaningfully entered the mainstream. For the first time, with the launch of ChatGPT in December 2022, Canadians have had their hands on generative AI that responds to their whims.

We see continued drops in print and linear television time. Both media are seeing strength and reinvention in different ways. TV, 'the device on the wall' dominates consumer time and is a prolonged early phase reinvention of content distribution. News media would be the third biggest 'walled garden' online and deserves more careful consideration for media investment from many marketers and agencies.

This year we drew inspiration from Annie Murphy Paul's *The Extended Mind* to consider ways that we think 'beyond the brain'. The growth of AI will teach us a lot about *human intelligence* and sophisticated marketers are likely to find a new balance between quantitative, algorithm approaches and the type of intuition that recognizes us as more complex beings.

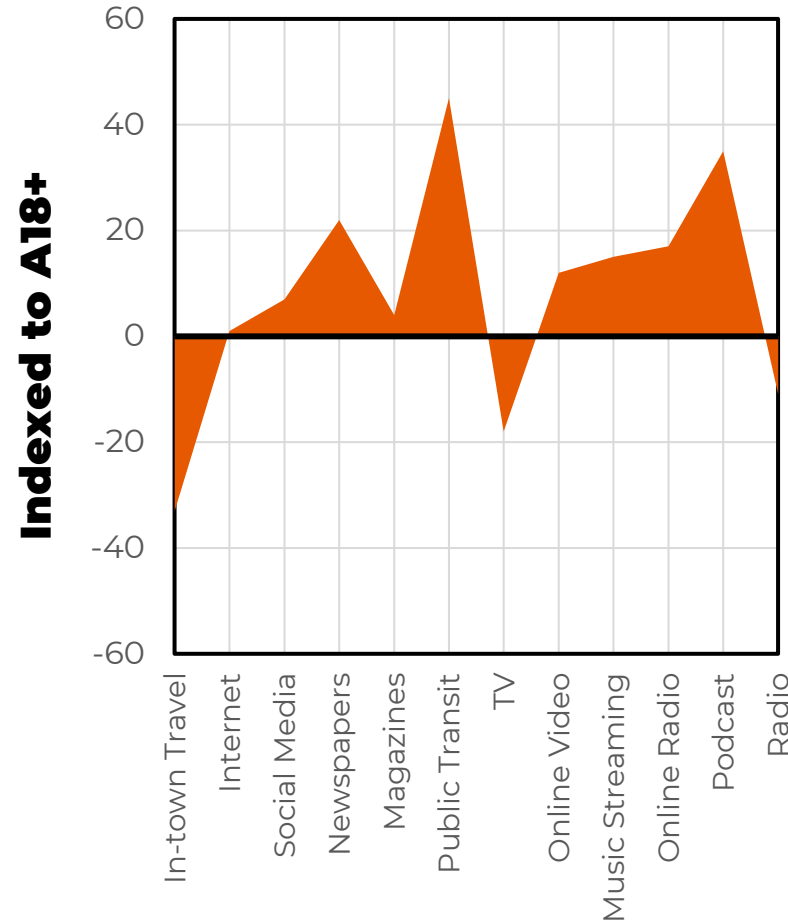
# The last 3 years: TV & Print Declines



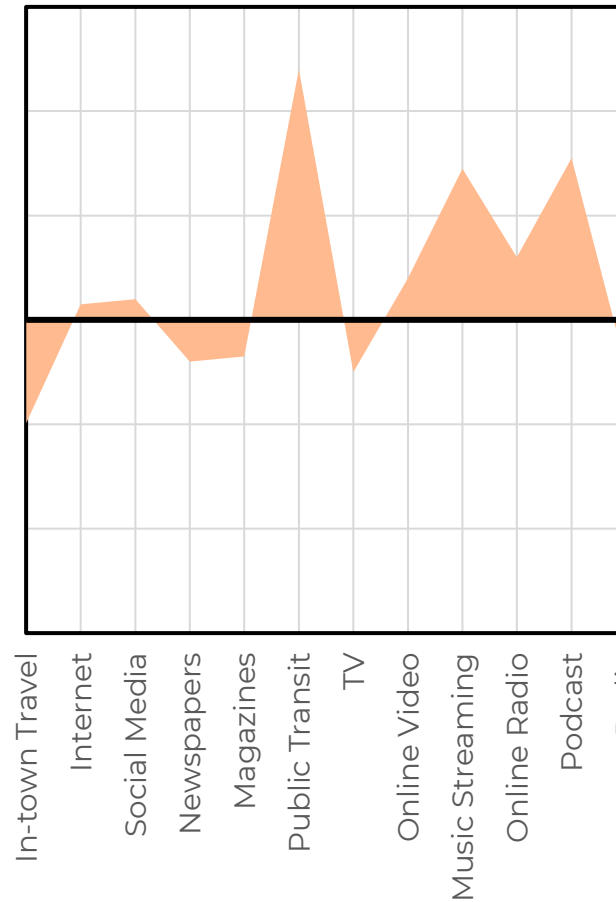
# Newer Canadians (<5 years) have distinct media habits



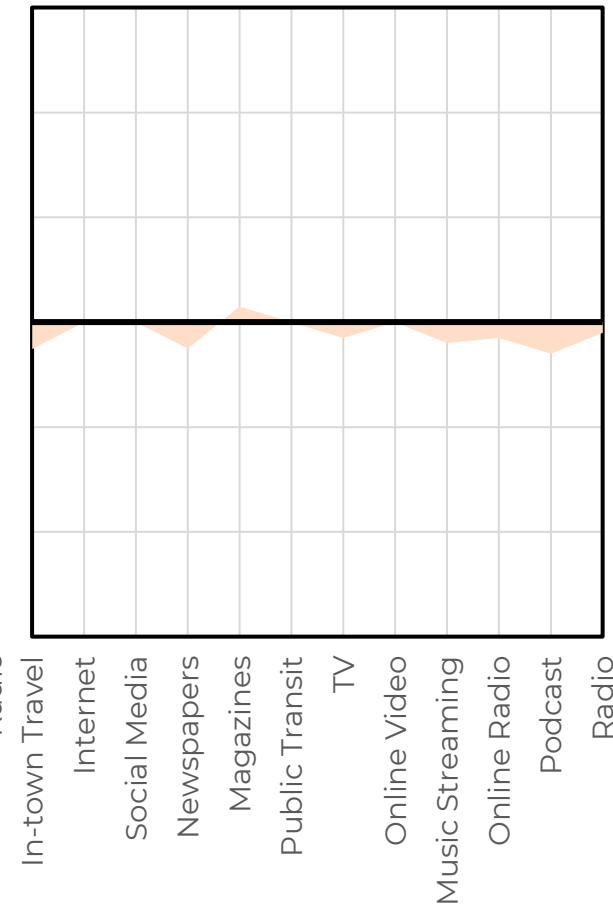
**Less than 5 years  
in Canada**



**5-10 years in  
Canada**



**More than 10  
years in Canada**



The leading audience measurement solutions in Canada are introducing an increasing amount of data reflecting our diversity.

Almost a quarter of Canadians were born outside Canada. Once they've been in Canada ten years or more their media habits tend, at least superficially, to look a lot like the general adult population.

Where the data is available, we've looked at newcomers who have been in Canada less than 5 years. And how their habits differ vs. other cohorts



**Under  
30**



**30-54**



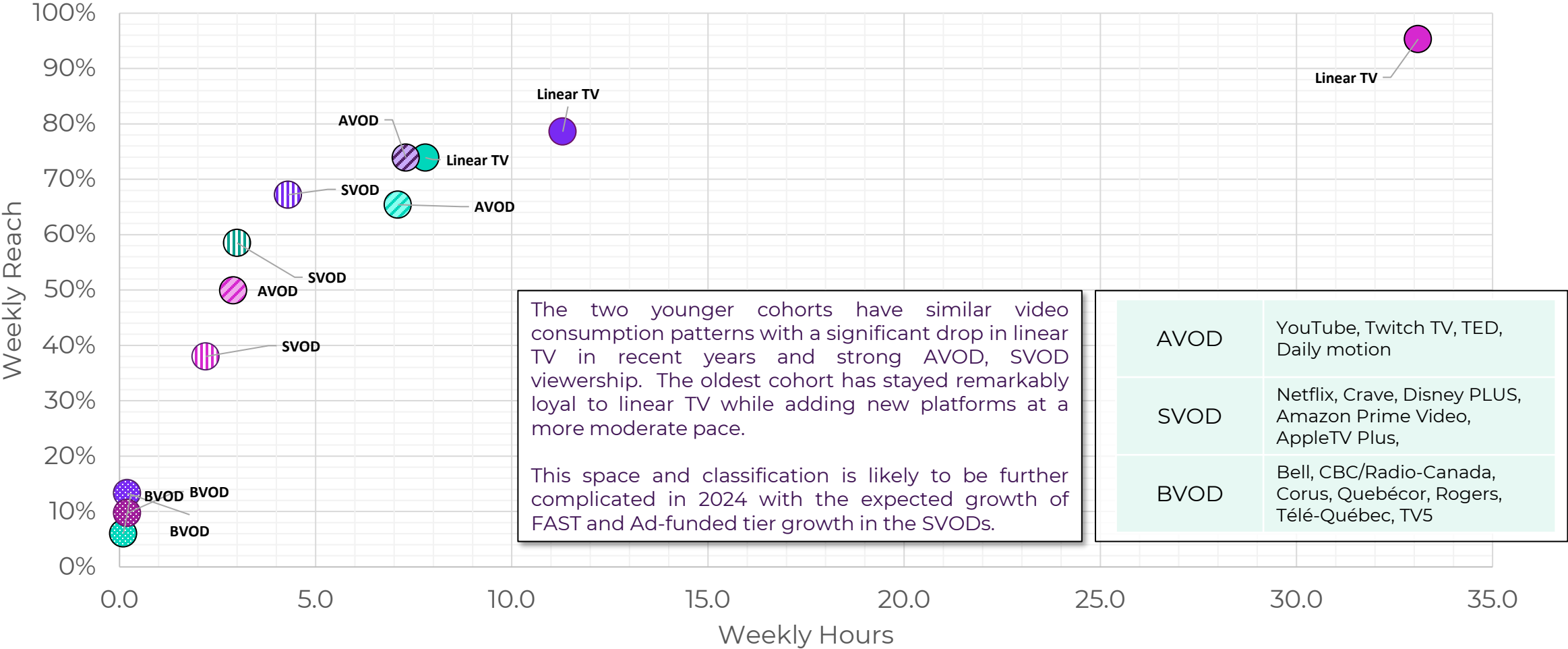
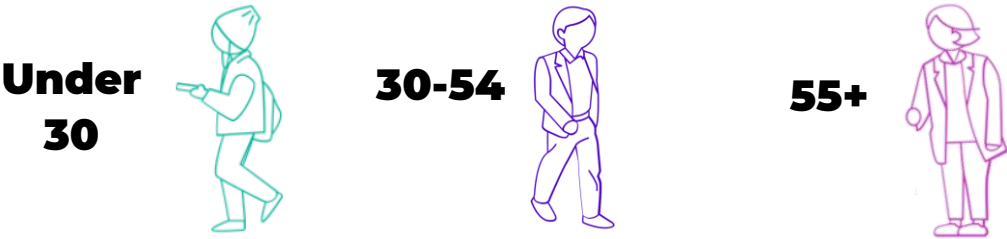
**55+**



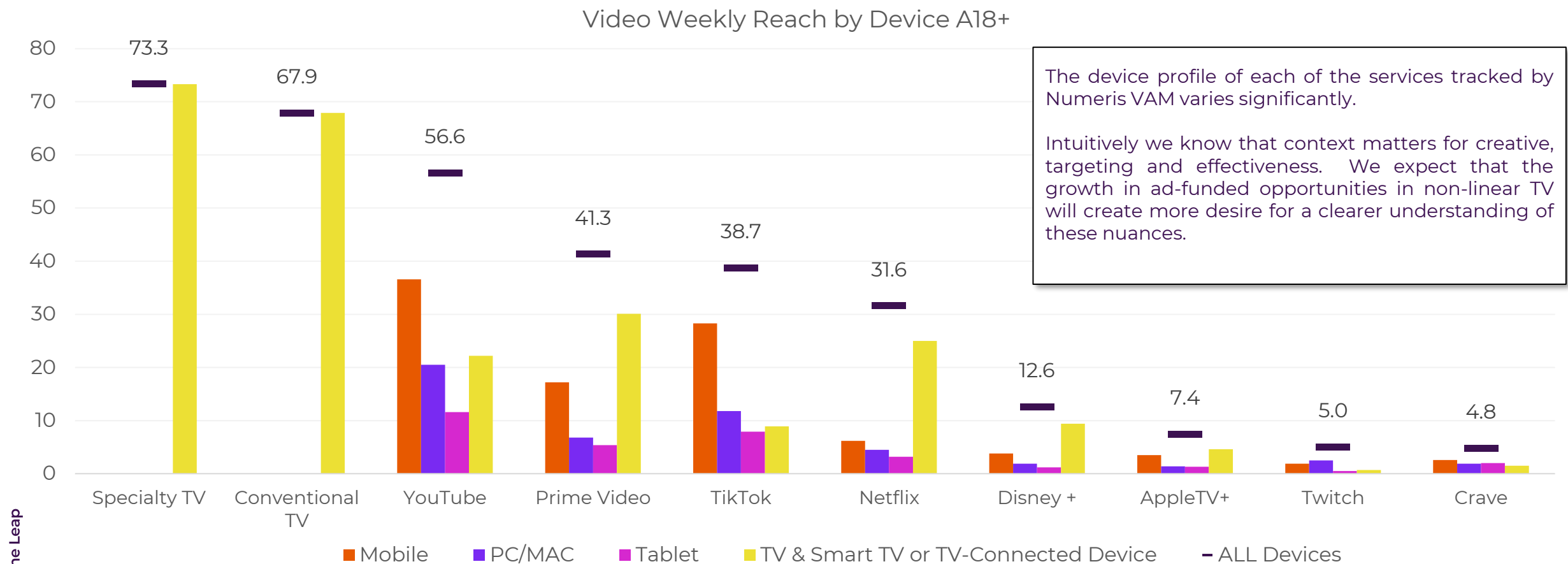
**Newcomers  
(<5 years)**



# Continued Adoption of Digital Video



# Platforms differ in their device distribution



Source: Numeris VAM, Mar 27 to June 25, 2023

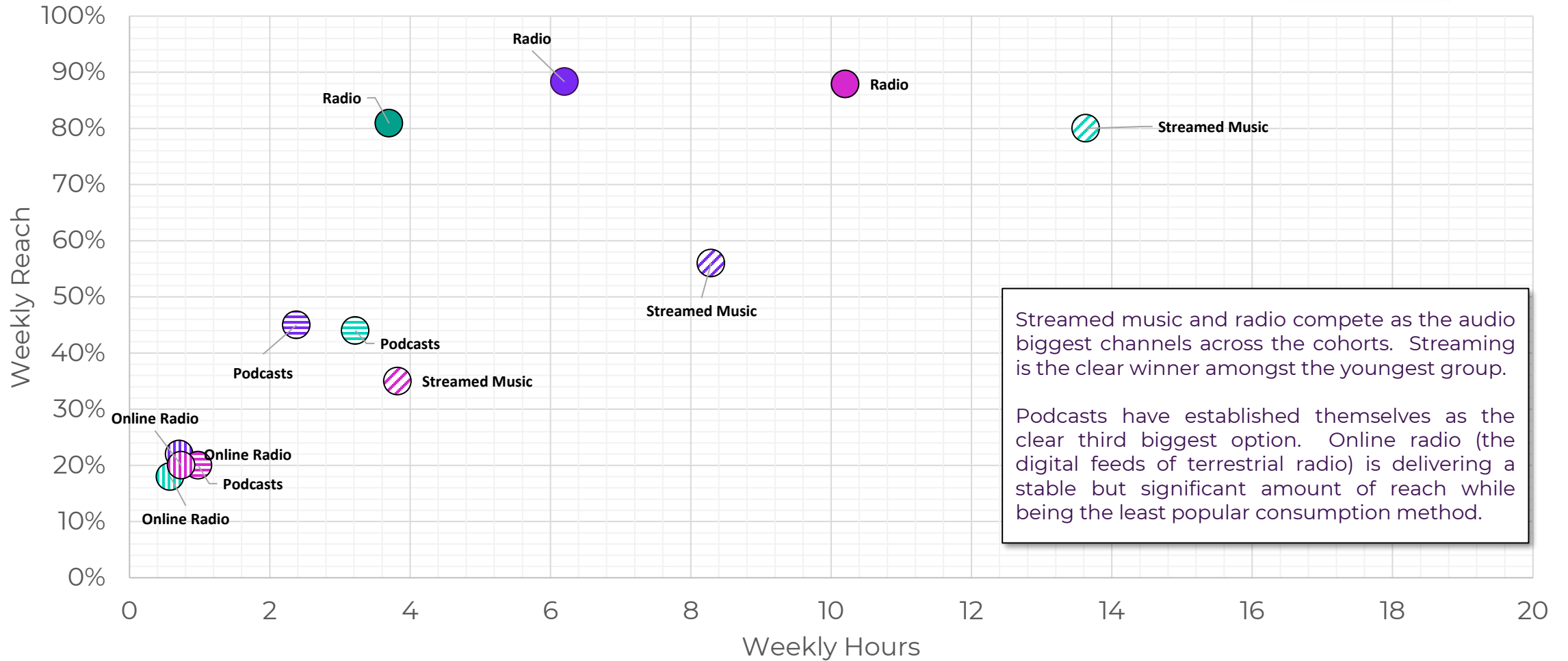
**Under  
30**



**30-54**



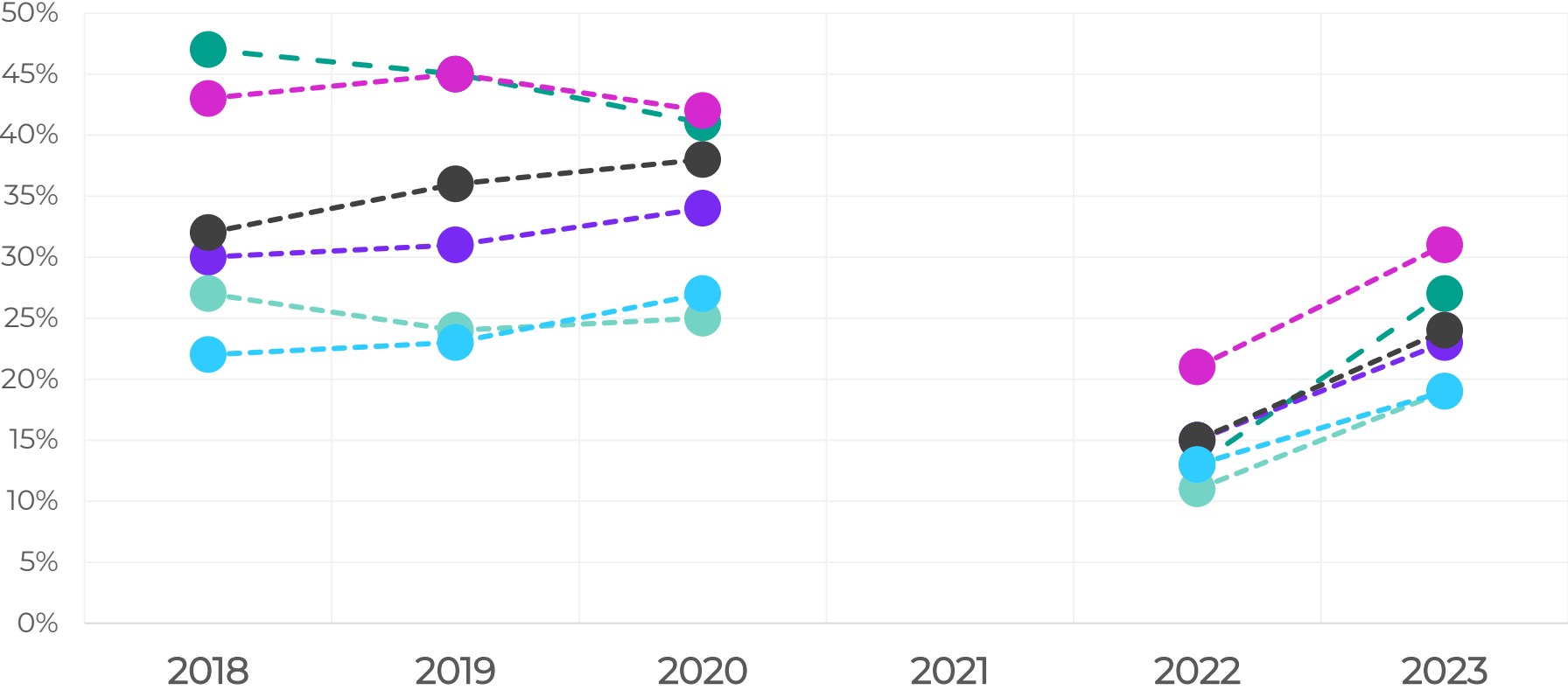
**55+**



Source: **Numeris PPM Radio, MTM Spring 2023**



Event Participation – Adults 16+



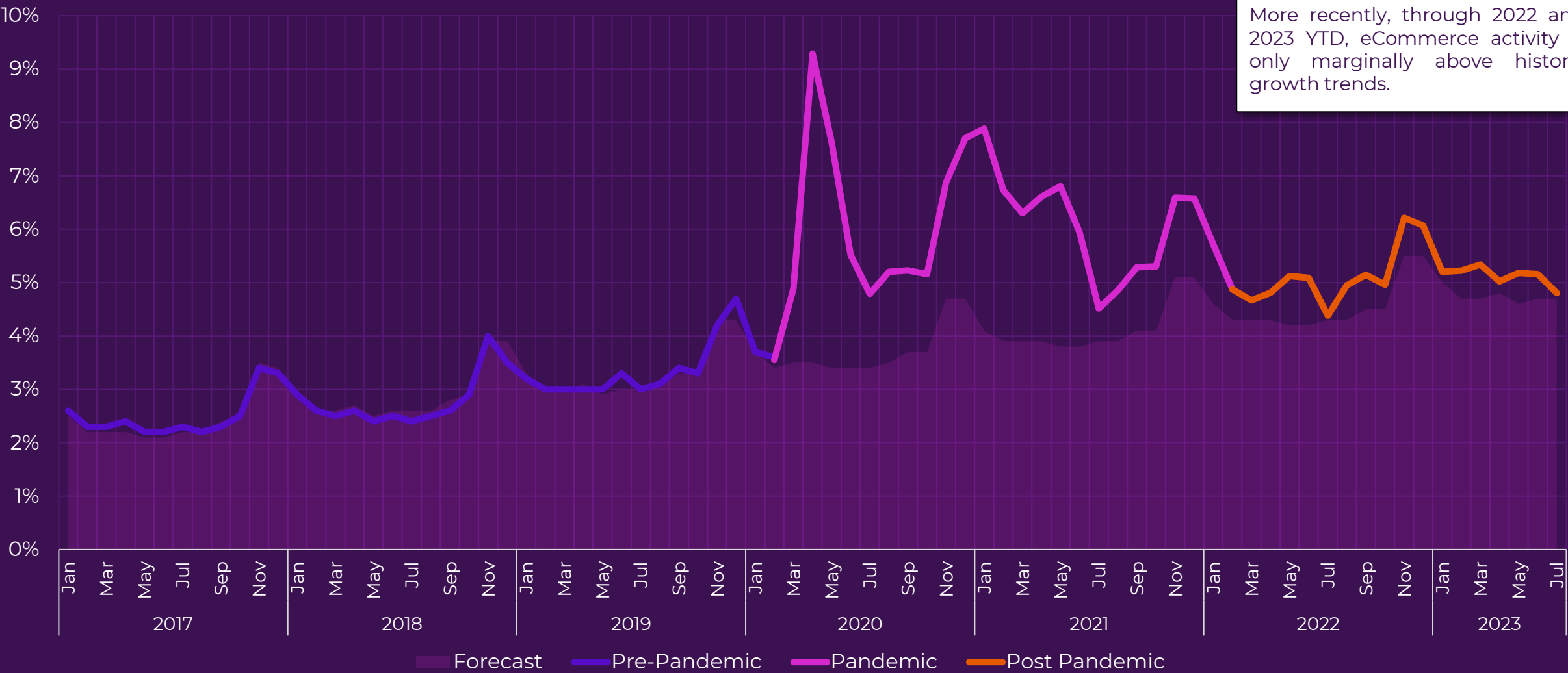
A wide range of activities showed relative stability pre-pandemic.

After a gap in measurement (2021 study for preceding months) we saw a dramatic drop in Canadians 'getting out of the house'. The behaviours, however, are clearly trending upwards.

# Share of Retail Sales Occurring Online

The first ~2 years of the pandemic period saw dramatic growth in eCommerce's share of retail spend..

More recently, through 2022 and 2023 YTD, eCommerce activity is only marginally above historic growth trends.

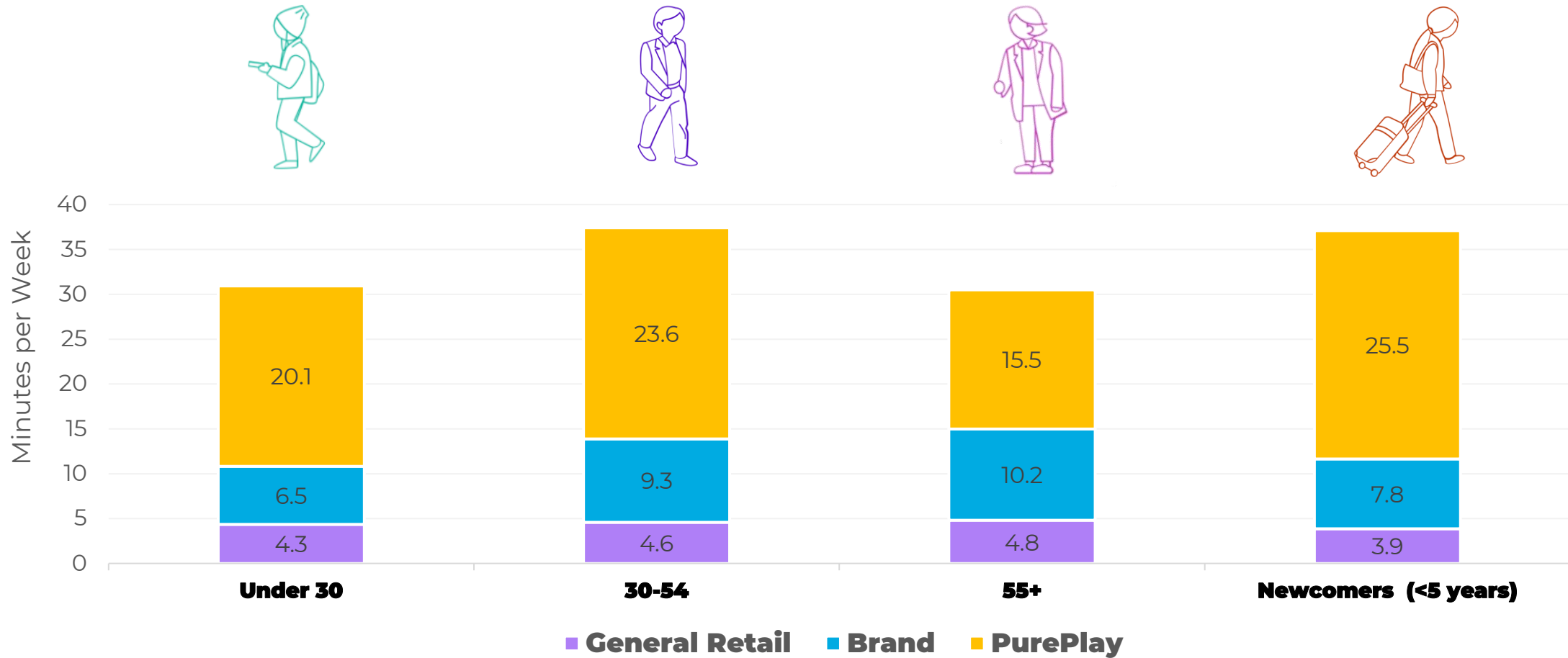


# Pureplay Retailers Dominate Time – especially amongst younger groups

Pureplay retailers (e.g. Amazon, Instacart) dominate eCommerce time on mobile and computer.

Brand sites represent a significant proportion of time – especially amongst the 55+ cohort.

Time Spent on Shopping Sites/Apps

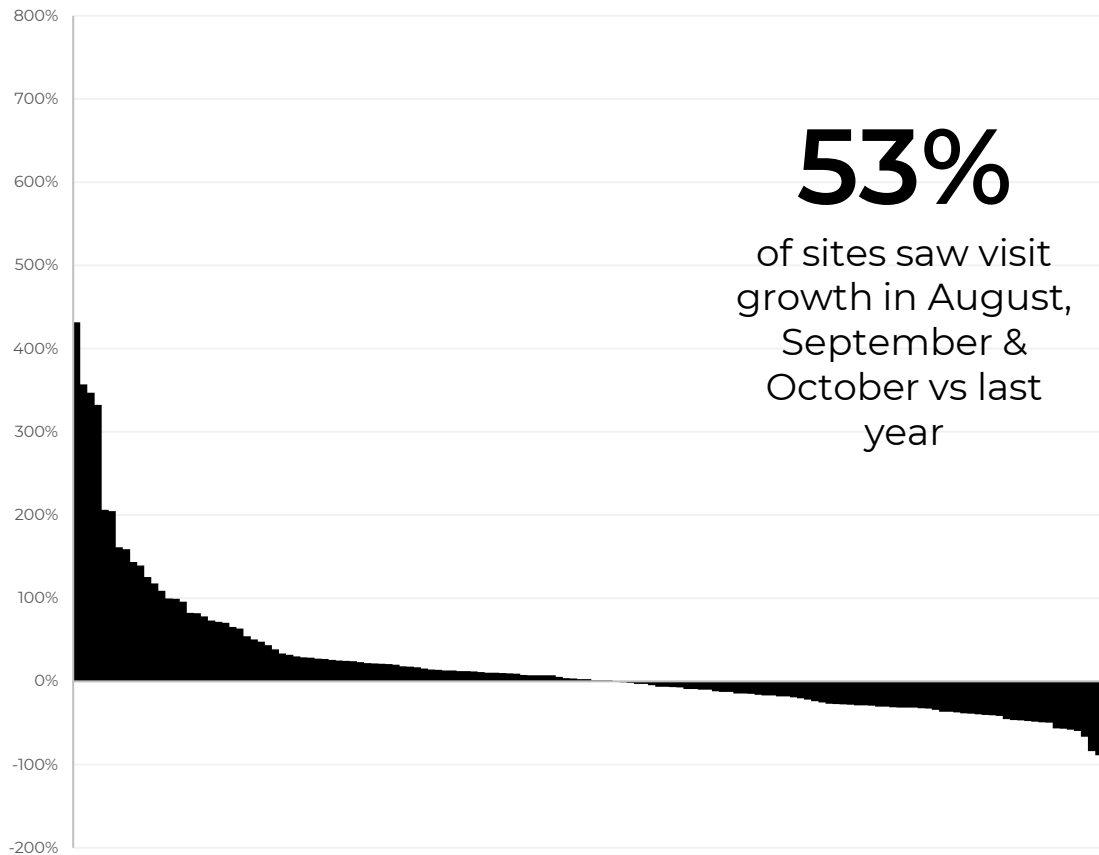


# There are traffic 'winners and losers' after the Meta news pause

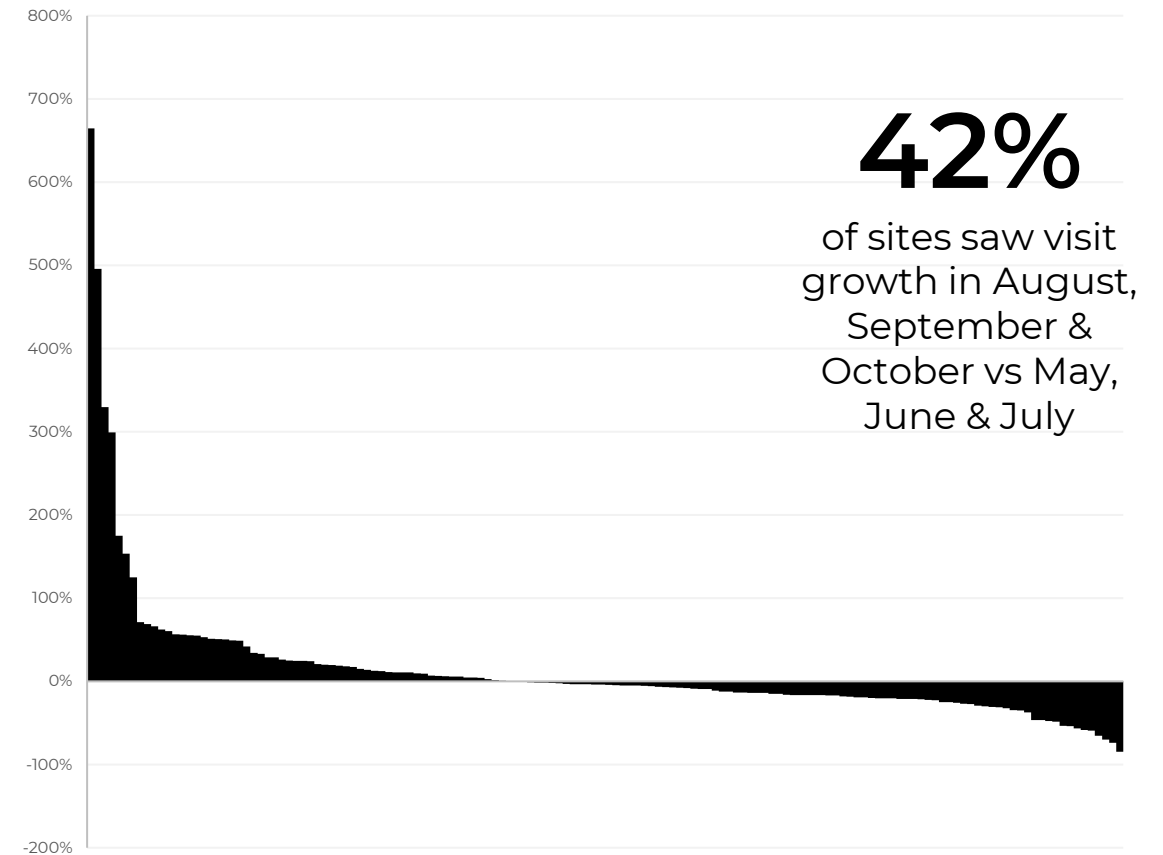
An examination of 150 news websites (including major national brands, established local brands and a diverse assortment of news indies) suggests that, in terms of traffic, the Meta news pause that started on 1 August 2023 has not been catastrophic. Overall traffic was down ~4% vs the previous 3 months (and 8% vs the previous year).

There were, however, clear traffic winners and losers (as shown below).

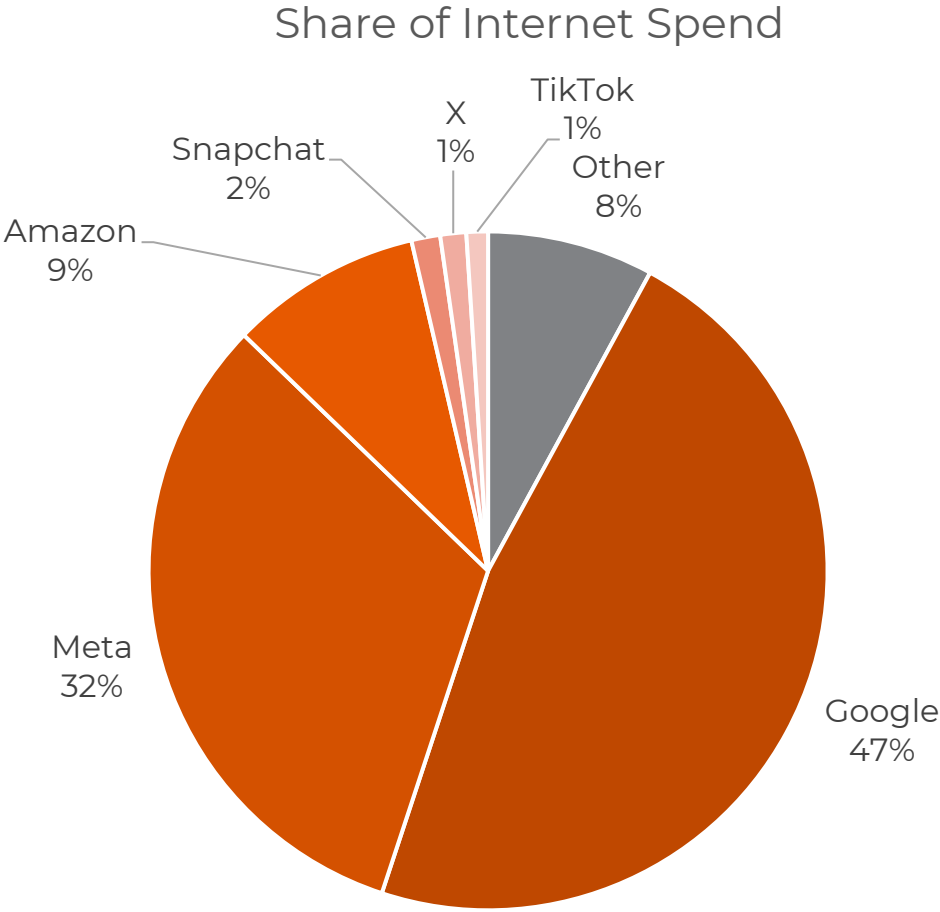
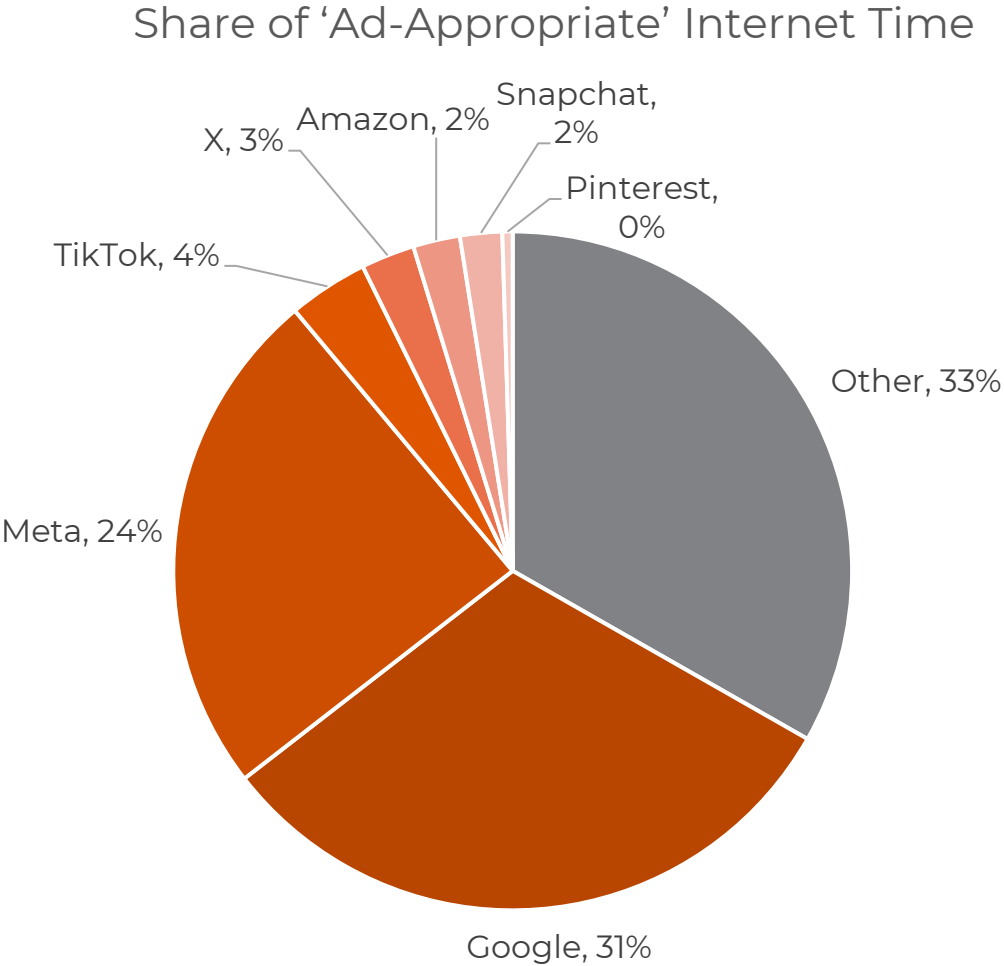
## Change vs Last Year



## Change vs Last Period

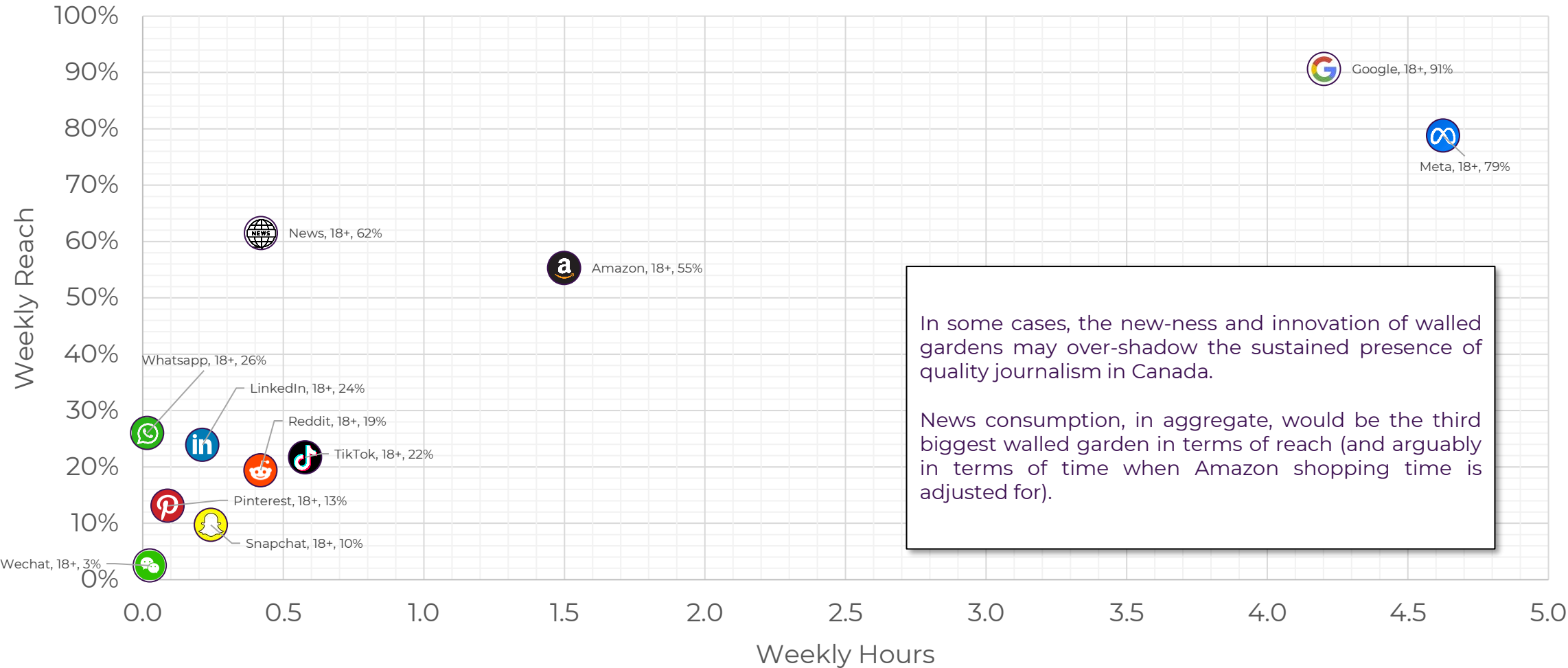


# Walled Gardens get a larger share of ad revenue than of consumer time

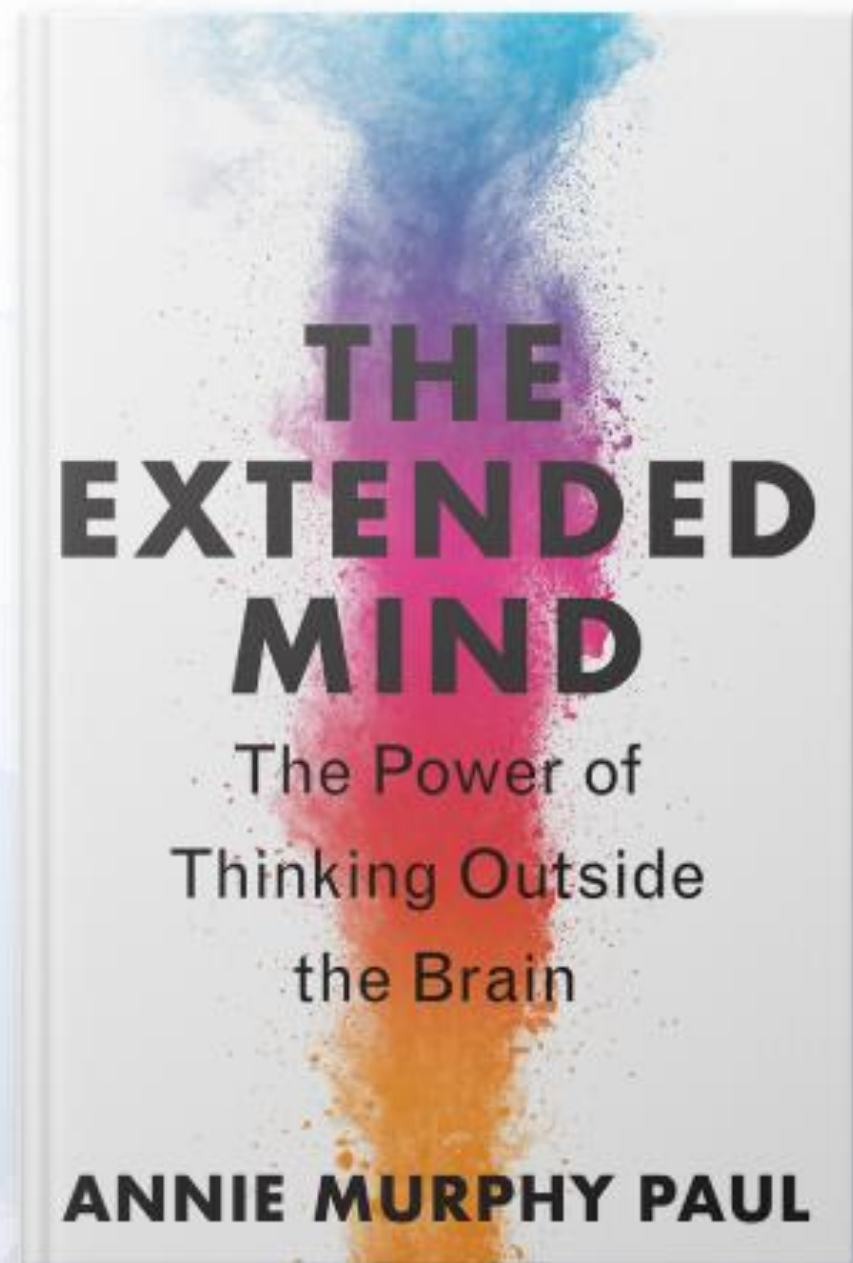


Source: Vividata Metrica Summer 2023, A18+, Canadian Media Concentration Research Project – note, overview should be viewed as directional given data constraints

# News would be the 3<sup>rd</sup> biggest ‘walled garden’



Source: Vividata Metrica Summer 2023, A18+



It's the stuff *outside*  
your head that  
makes you smart.

***The Extended Mind***

by Annie Murphy Paul

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