



# 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.

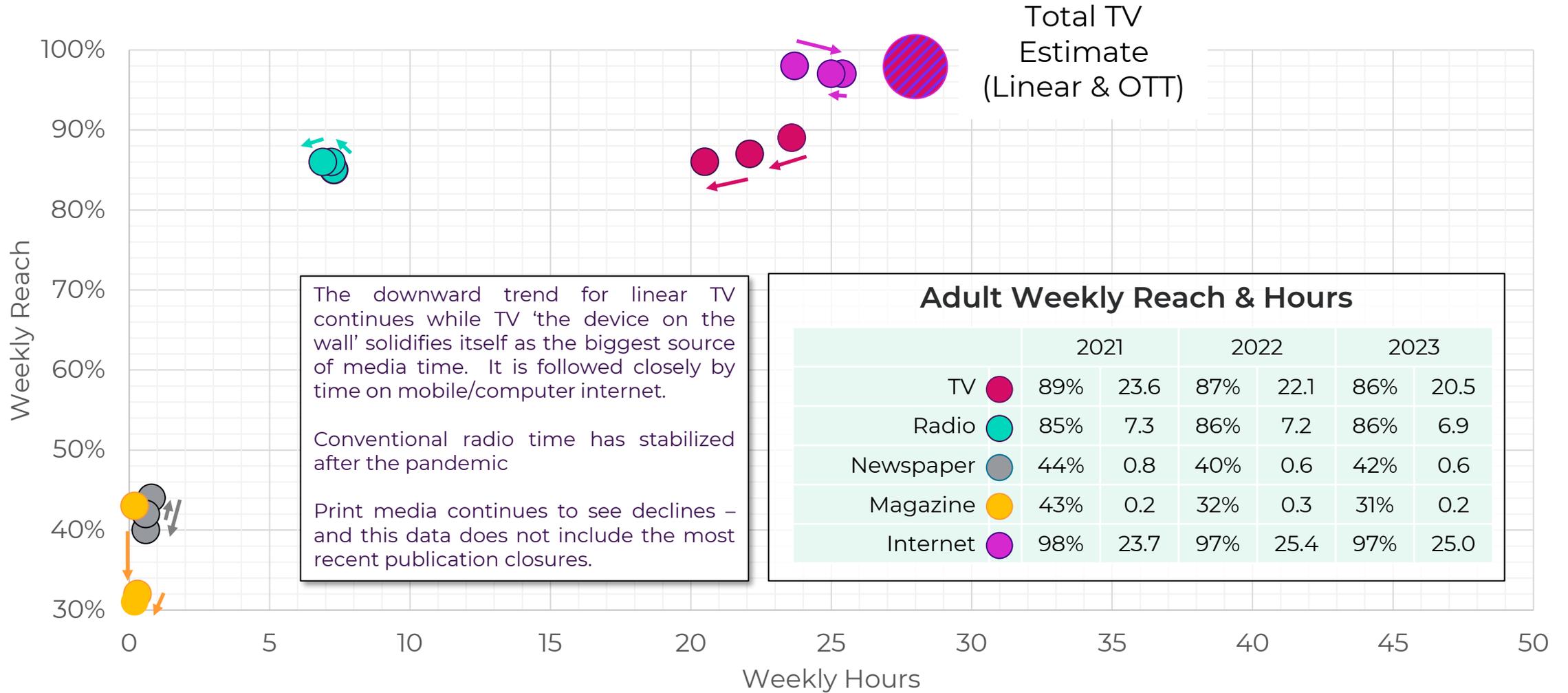
The study documents consumers' changing media consumption as digital technologies increasingly impact Canadians' habits.

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



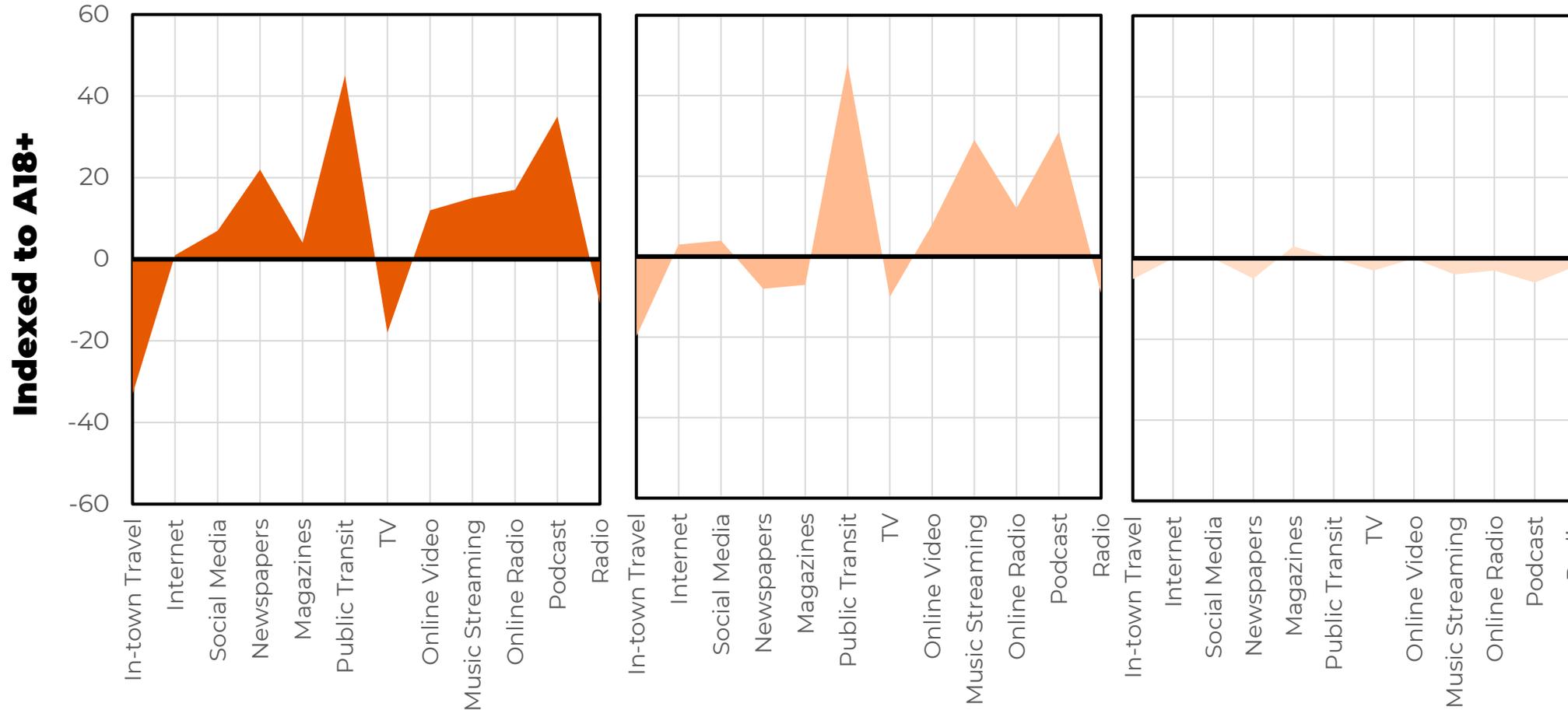
# Newer Canadians (<5 years) have distinct media habits



**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)**



This household device ownership data from MTM demonstrates how Canadians have, on average, embraced technology.

The two younger cohorts (i.e. Canadians <55) have very similar adoption patterns. While the oldest of the cohorts lags on ownership on most of the devices, they're not that far behind the averages.

Newcomers, on average, have a pragmatic approach to technology. They're less likely to have adopted gaming systems and (with a caveat for small sample size) appear to be embracing ChatGPT

# Continued Adoption of Digital Video

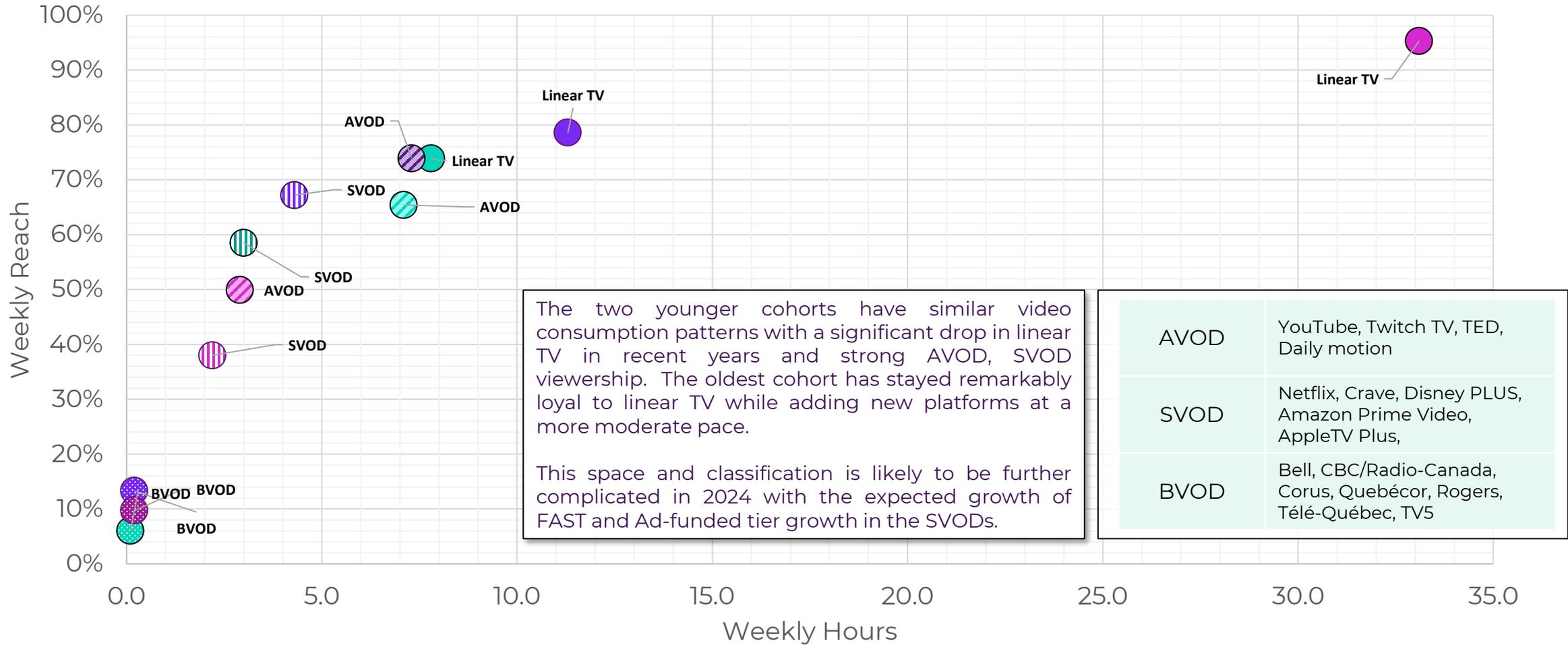
**Under 30**



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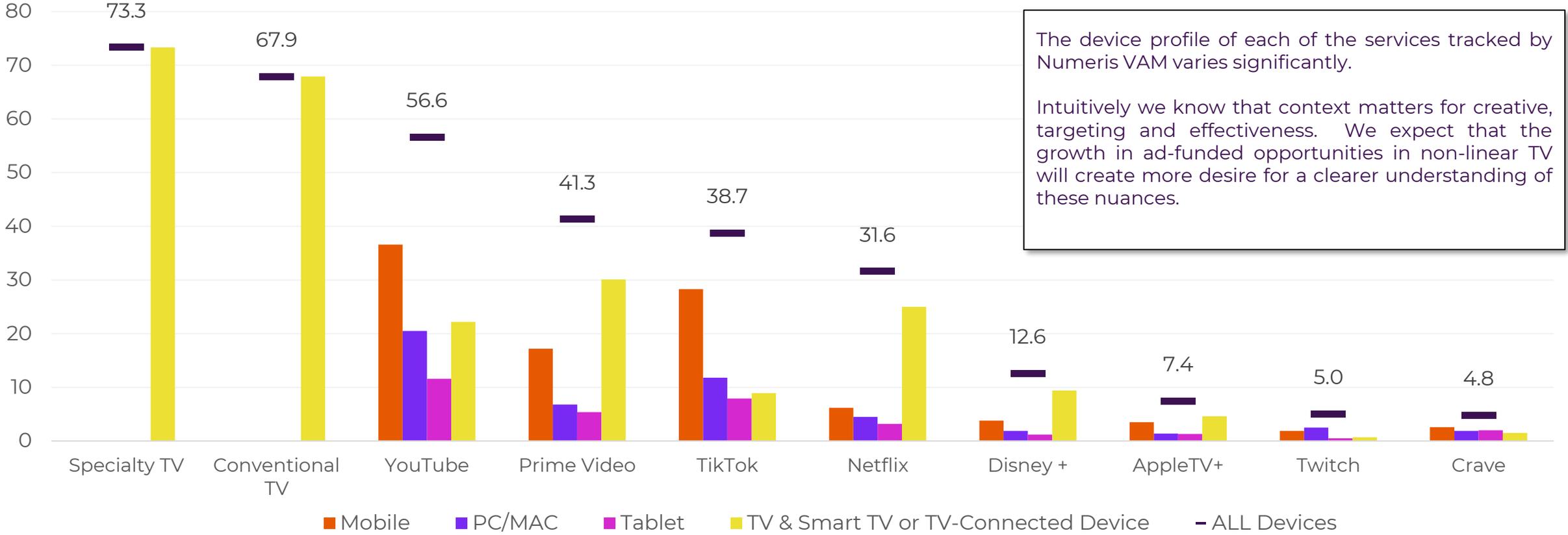
The two younger cohorts have similar video consumption patterns with a significant drop in linear TV in recent years and strong AVOD, SVOD viewership. The oldest cohort has stayed remarkably loyal to linear TV while adding new platforms at a more moderate pace.

This space and classification is likely to be further complicated in 2024 with the expected growth of FAST and Ad-funded tier growth in the SVODs.

AVOD	YouTube, Twitch TV, TED, Daily motion
SVOD	Netflix, Crave, Disney PLUS, Amazon Prime Video, AppleTV Plus,
BVOD	Bell, CBC/Radio-Canada, Corus, Québecor, Rogers, Télé-Québec, TV5

# Platforms differ in their device distribution

Video Weekly Reach by Device A18+



The device profile of each of the services tracked by Numeris VAM varies significantly.

Intuitively we know that context matters for creative, targeting and effectiveness. We expect that the growth in ad-funded opportunities in non-linear TV will create more desire for a clearer understanding of these nuances.

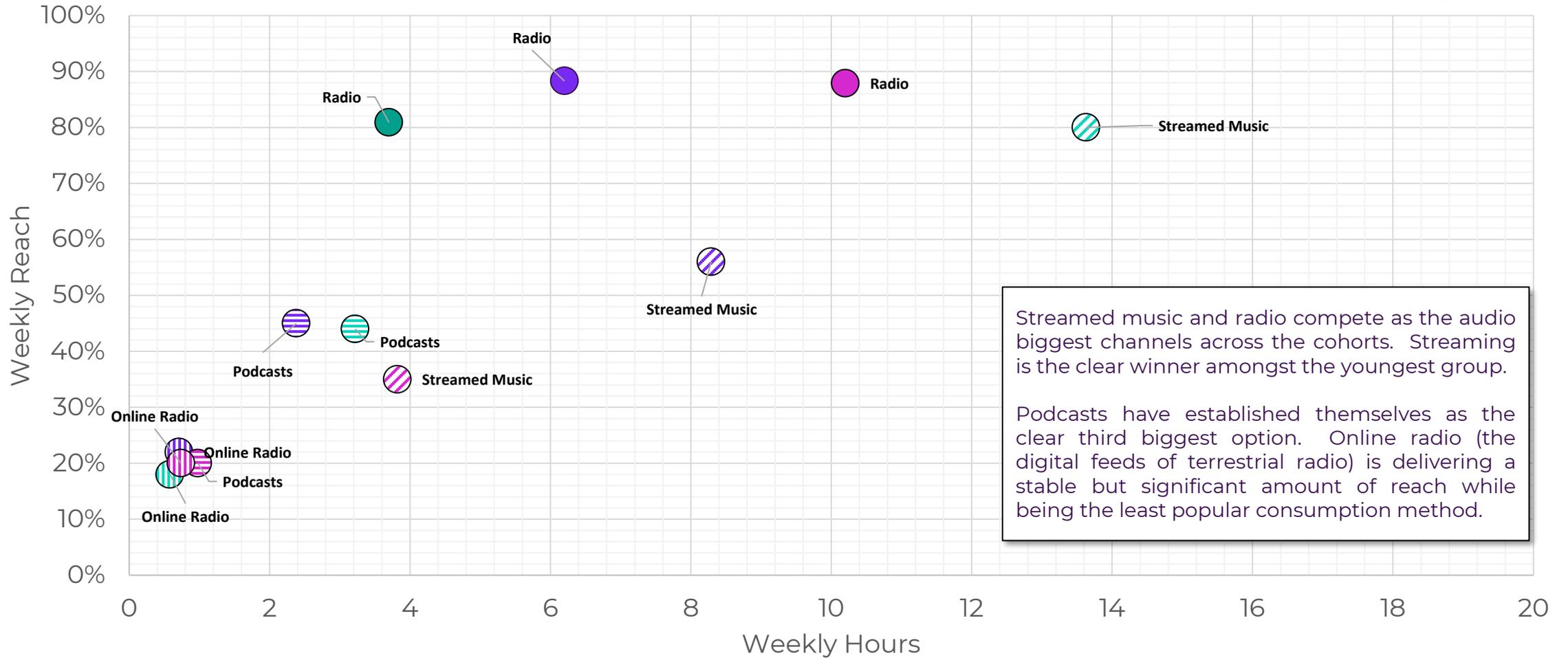
**Under  
30**



**30-54**



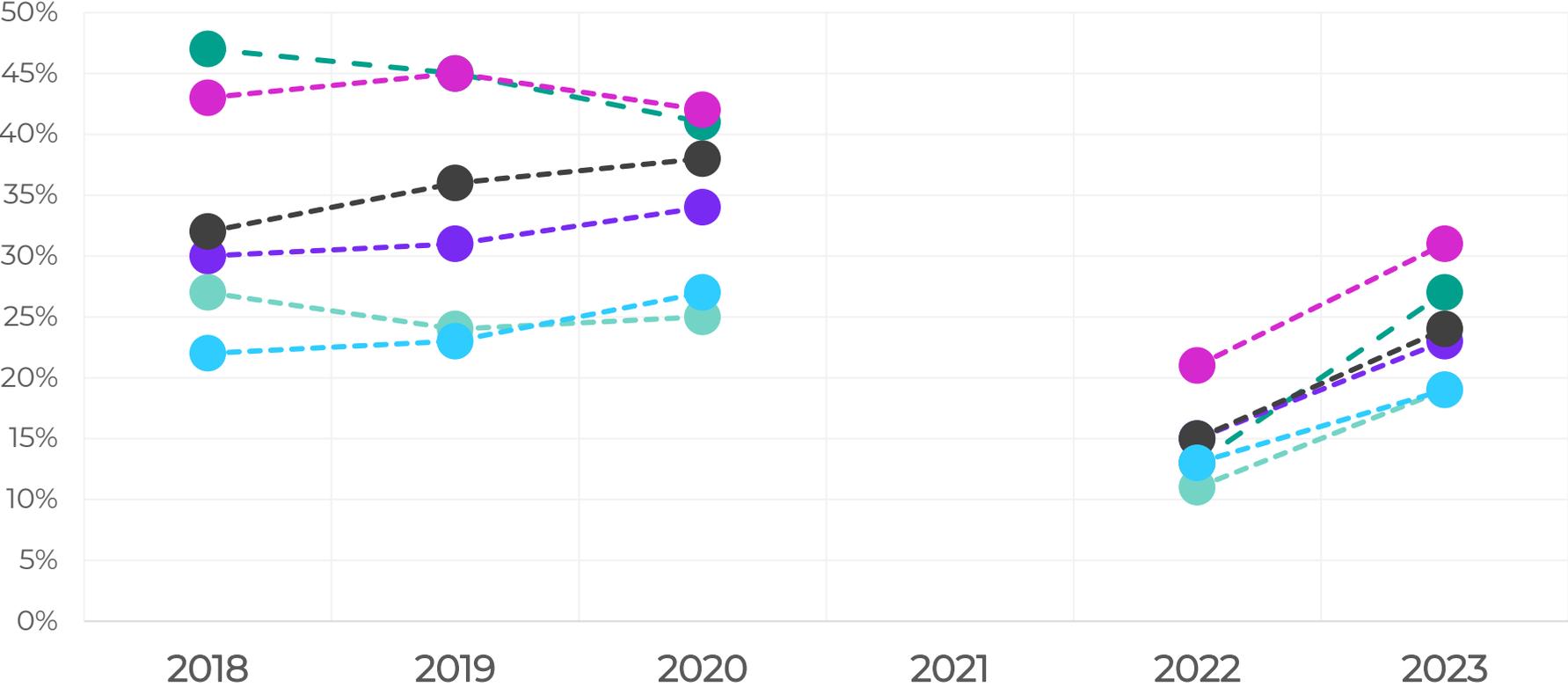
**55+**



Streamed music and radio compete as the audio biggest channels across the cohorts. Streaming is the clear winner amongst the youngest group.

Podcasts have established themselves as the clear third biggest option. Online radio (the digital feeds of terrestrial radio) is delivering a stable but significant amount of reach while being the least popular consumption method.

# Event Participation – Adults 16+



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

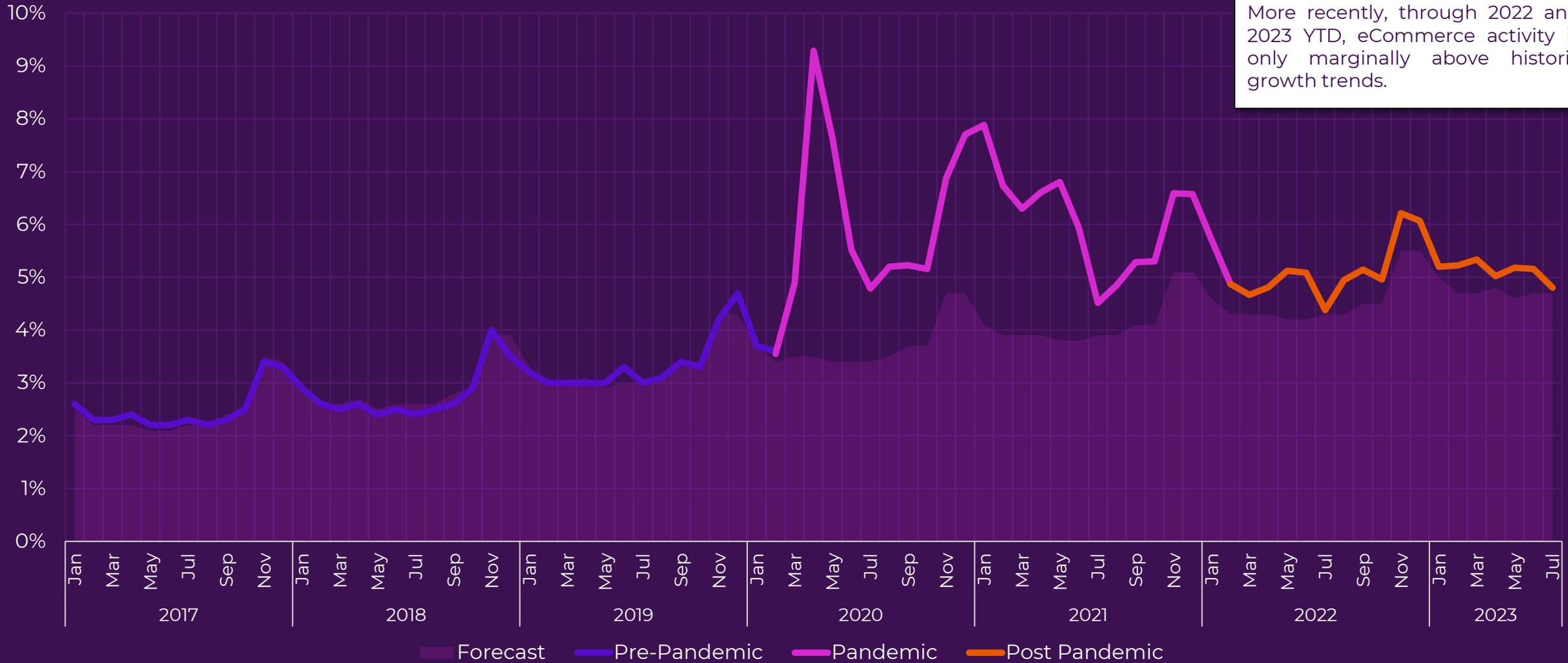
After a gap in measurement (2021 study for preceding months) we saw a dramatic drop in Canadians 'getting out of the house'. The behaviours, however, are clearly trending upwards.

Sources: Vividata Fall, 2018 to 2023. Questions were not asked in Fall 2021.

# 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.

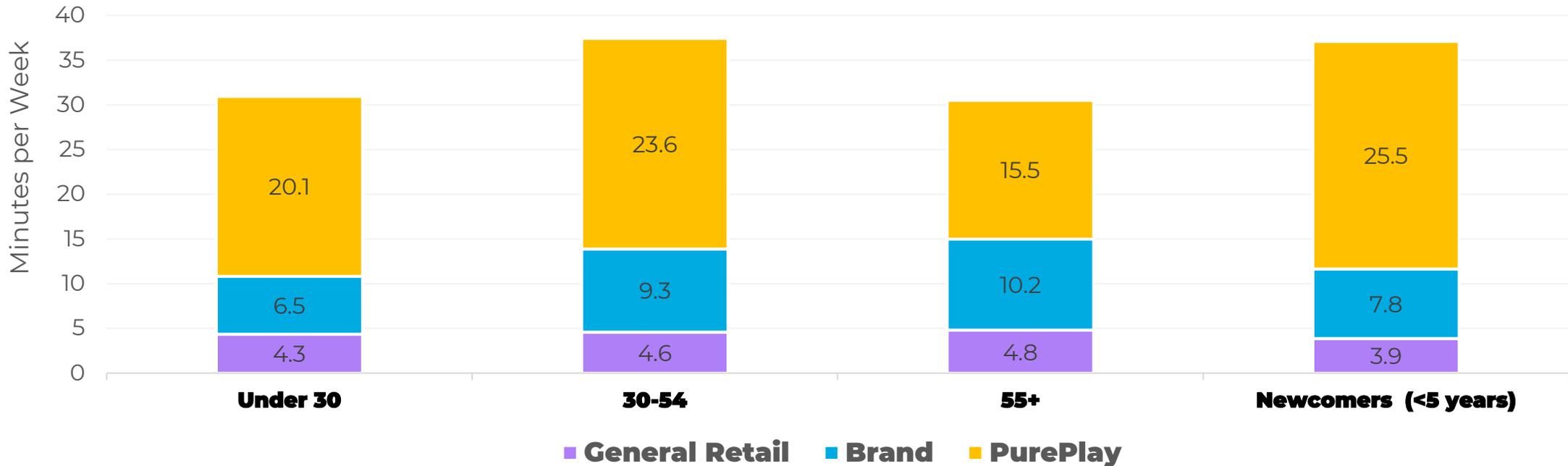


# Pureplay Retailers Dominate Time – especially amongst younger groups

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



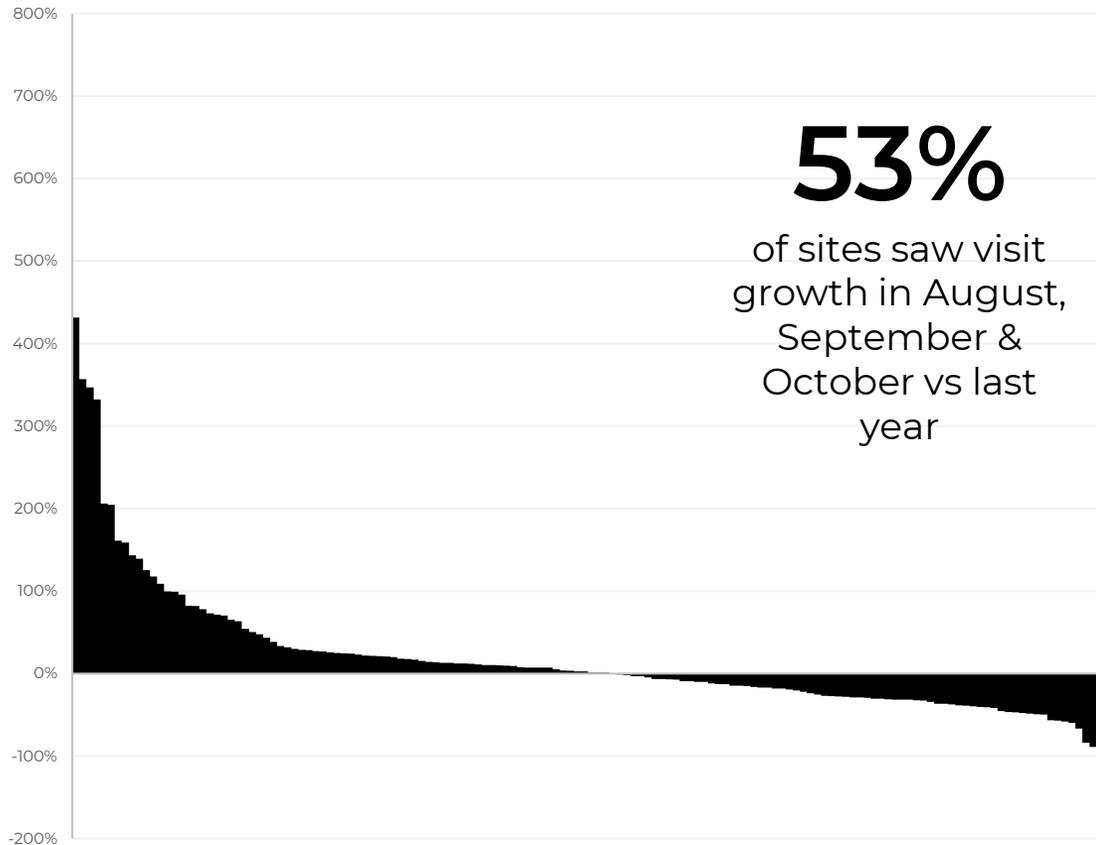
# There are traffic 'winners and losers' after the Meta news pause

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).

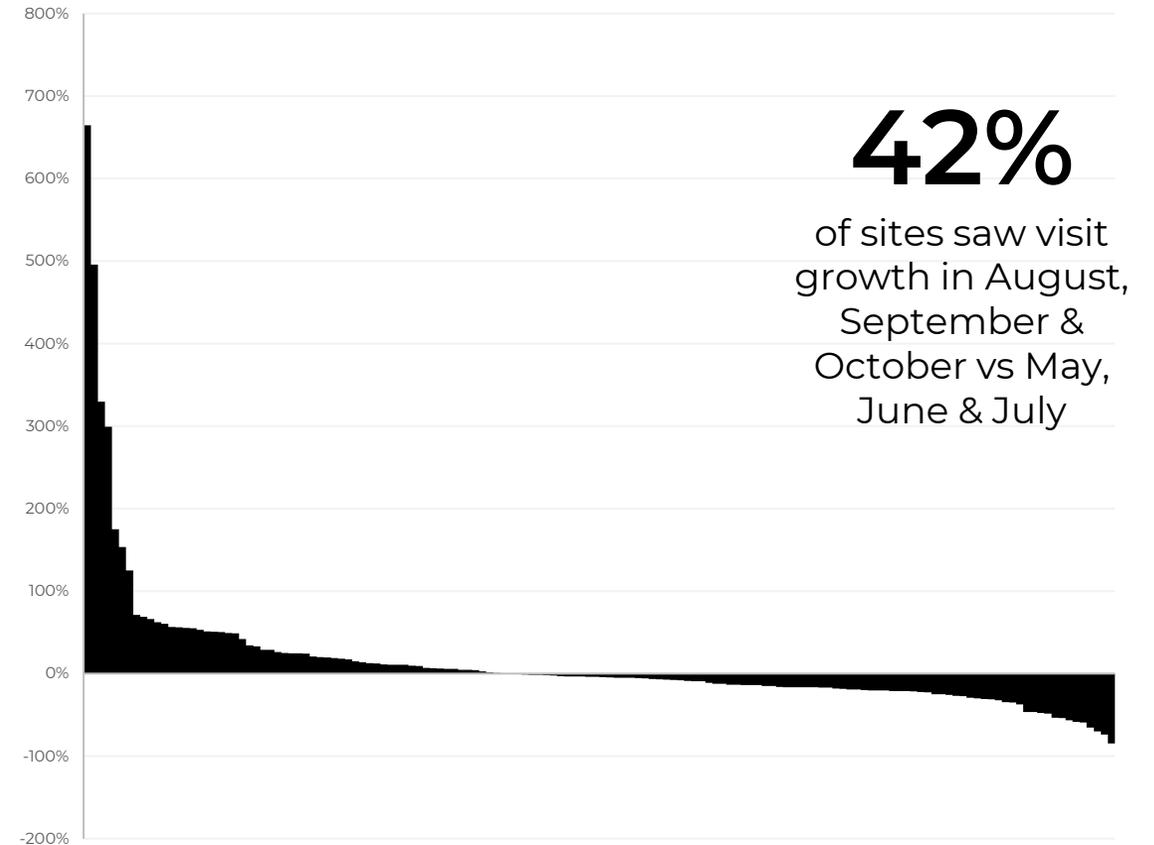
There were, however, clear traffic winners and losers (as shown below).

Source: Similarweb visits of 150 Canadian News Sites

### Change vs Last Year

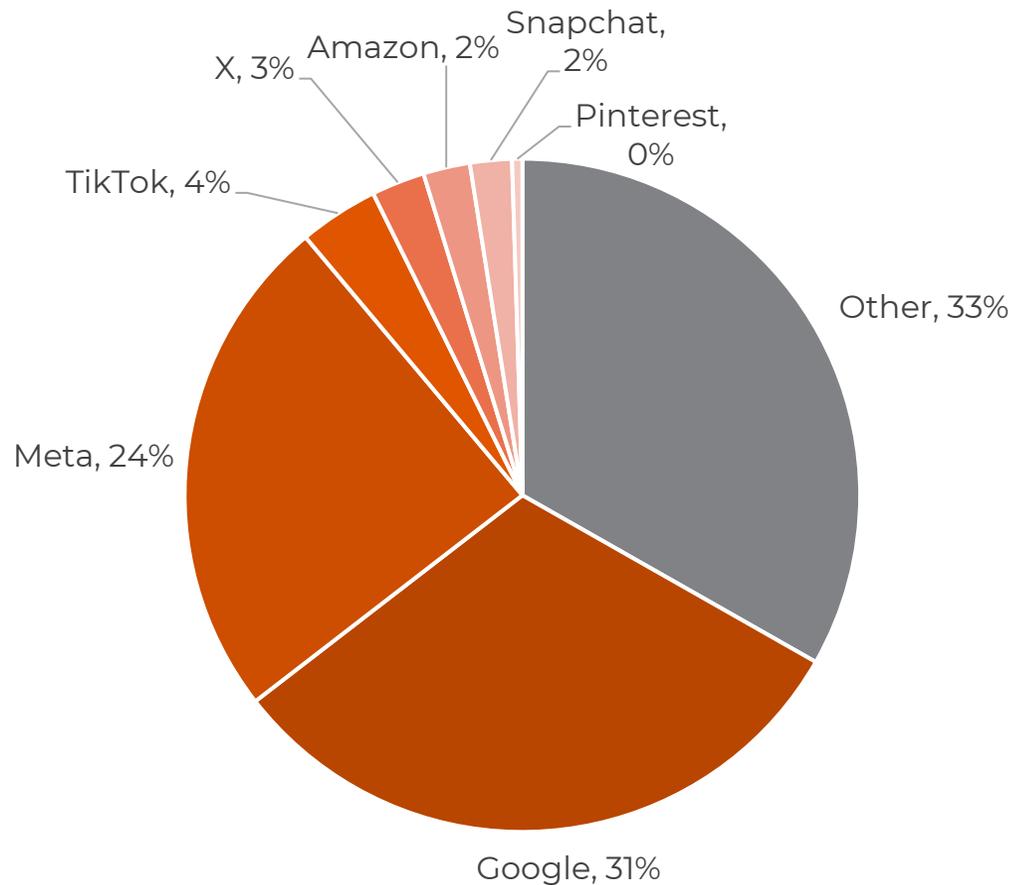


### Change vs Last Period

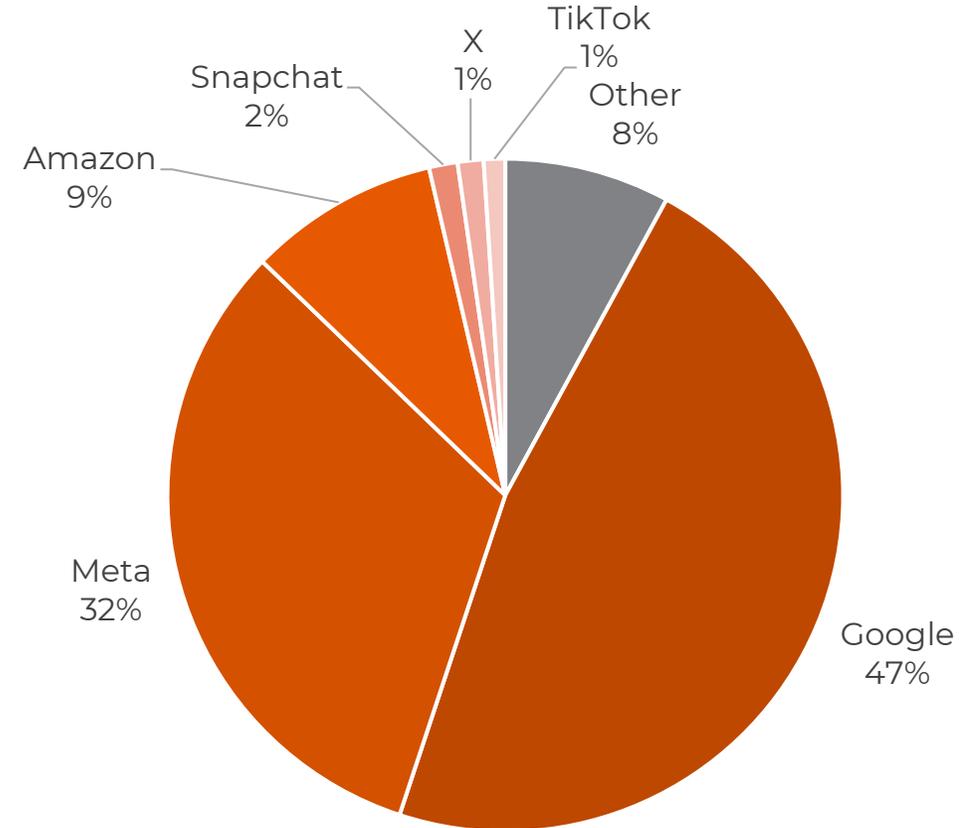


# Walled Gardens get a larger share of ad revenue than of consumer time

Share of 'Ad-Appropriate' Internet Time



Share of Internet Spend

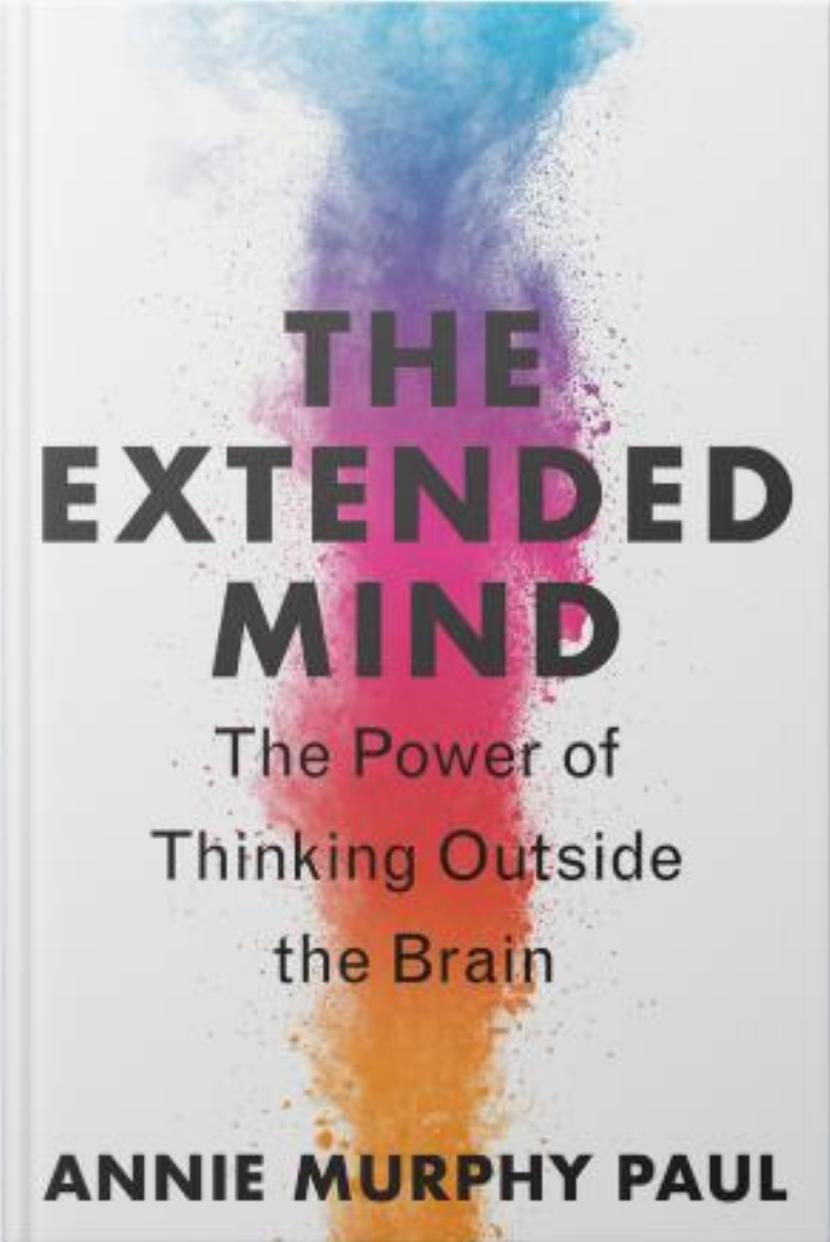


Source: Vividata Metrica Summer 2023, A18+, Canadian Media Concentration Research Project – note, overview should be viewed as directional given data constraints

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



Source: Vividata Metrica Summer 2023, A18+



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