



# CMUST

Canadian Media Usage Study

Prepared by PHD, November 2024

# 2024

## What's CMUST?

This is the 21<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. 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.

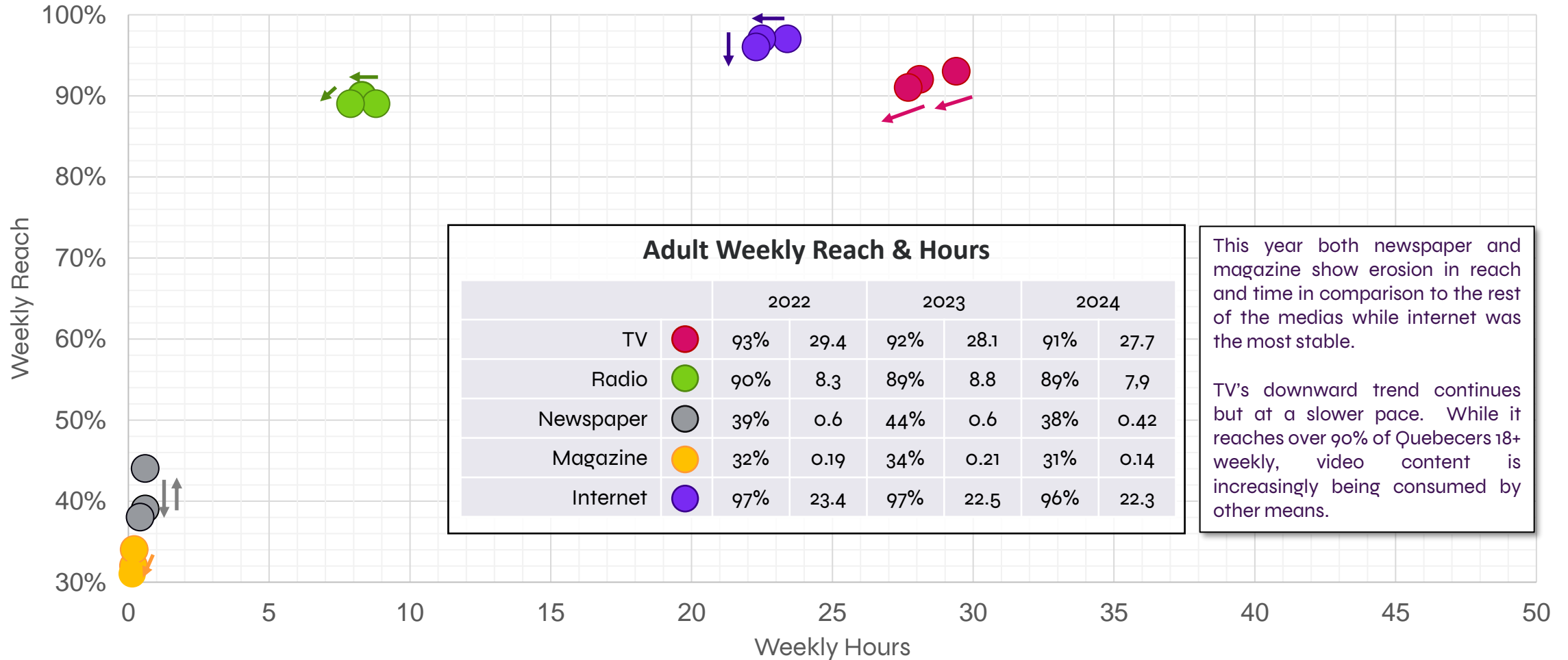
Another notable trend of 2024 is the rise of the 'Retail Media Network'. Various sources forecast significant growth in spend in Retail Media in the years ahead.

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.



# The last 3 years: Linear TV continues its decline



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



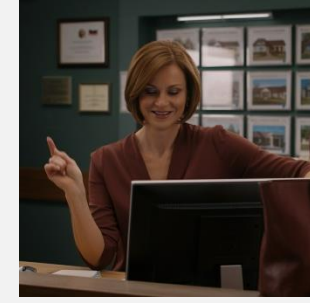
## Busy Breadwinners



## 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 **HOMESENSE**



**Personal Appearance  
categories, Food  
Delivery**

WINNERS **HOMESENSE**



**Children's products,  
Travel, Financial  
Services**

**Walmart**

**Financial Services,  
Alcohol, Pet food**

**SHOPPERS  
DRUG MART**



**Cosmetic, Gardening  
supplies,  
books**

**Jean Coutu**



**Will/Estate planning,  
Lottery**



Anxiously  
Affluent



Busy  
Bread-  
winners



Modestly  
Content

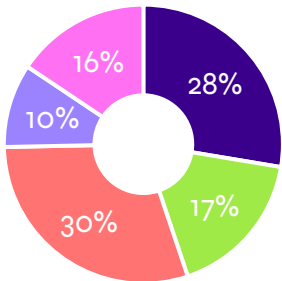


Musically  
Happy

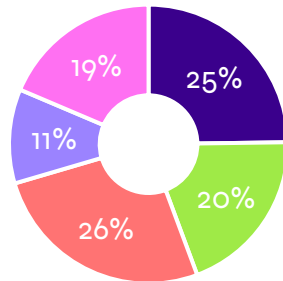


Relaxed  
Retirees

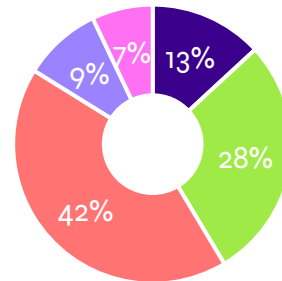
Share of  
Population



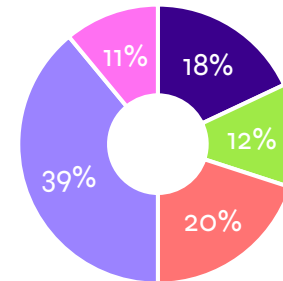
Share of Online  
Spend



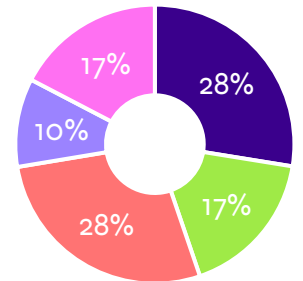
Share of  
Video Time



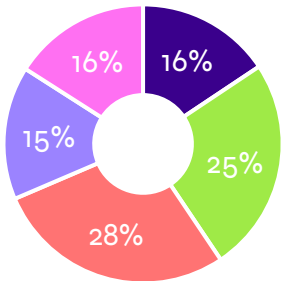
Share of  
Audio Time



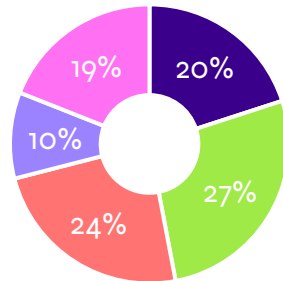
Share of News &  
Content Time  
(Online & Offline)



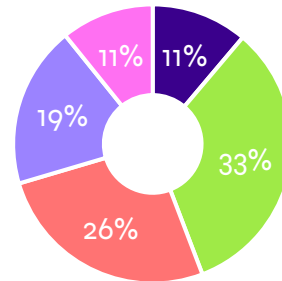
Share of  
Total Media Time



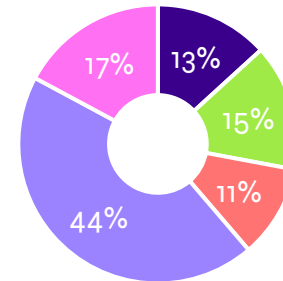
Share of Social  
Media Time



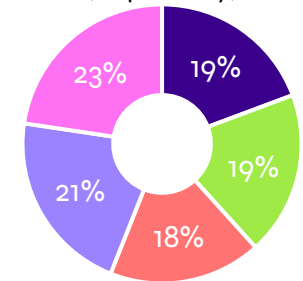
Share of  
Digital Video Time



Share of  
Digital Audio Time



Share of News &  
Content Time  
(Digital Only)

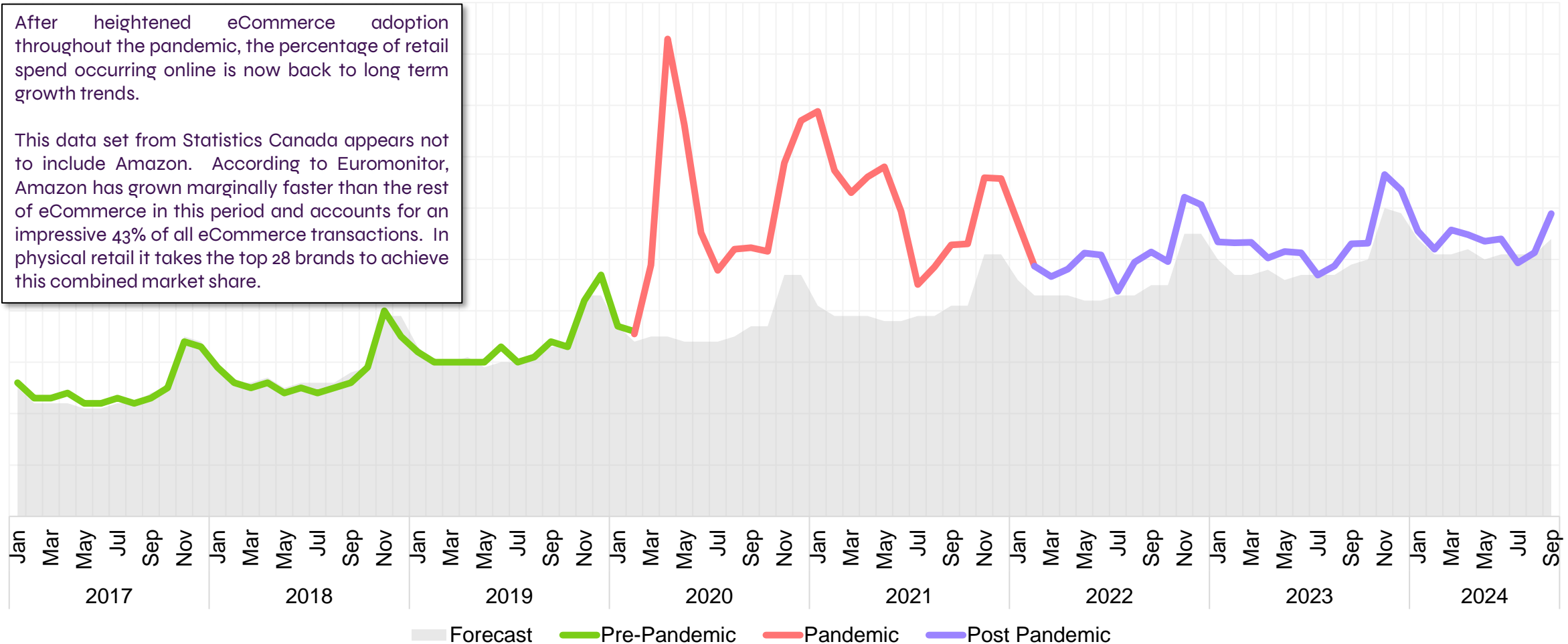


# Ecommerce Usage is Back on Long Term Growth Trends

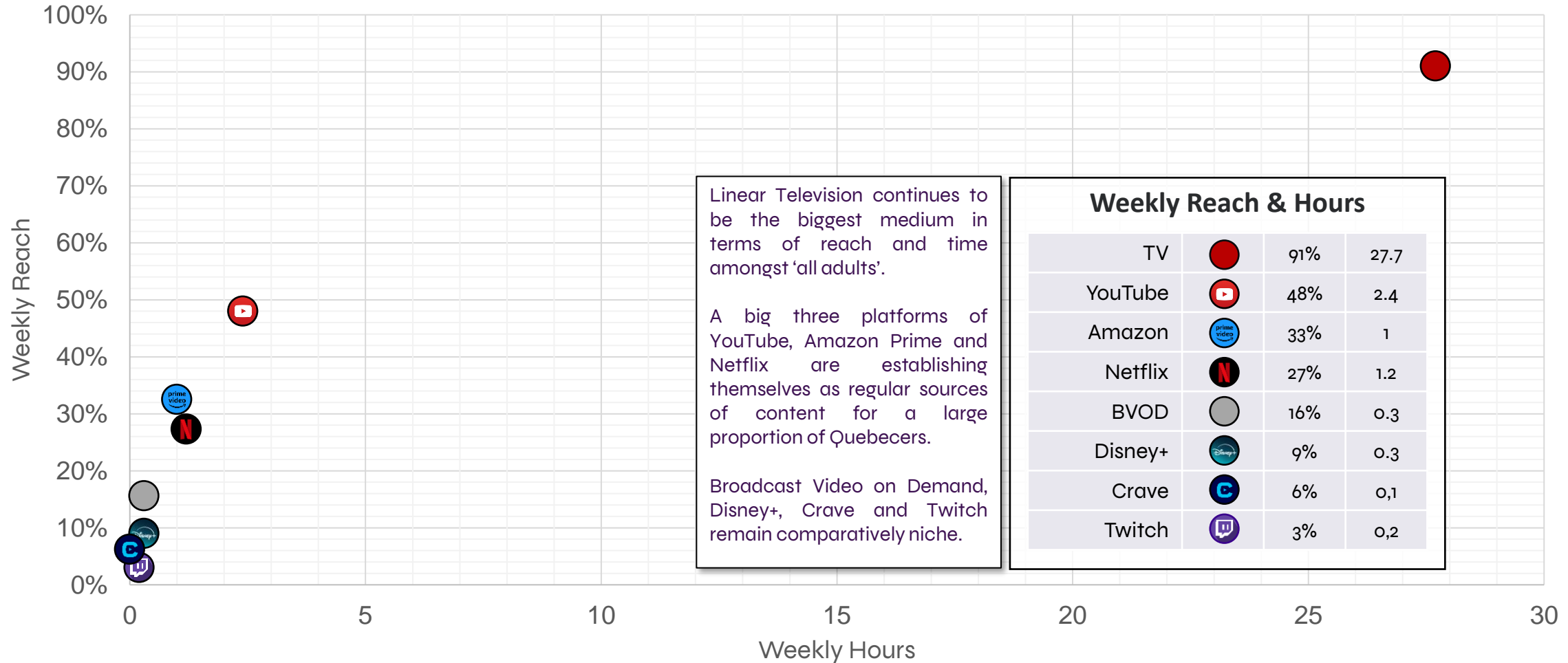
## Share of Retail Sales Occurring Online (Statistics Canada Data)

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.



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

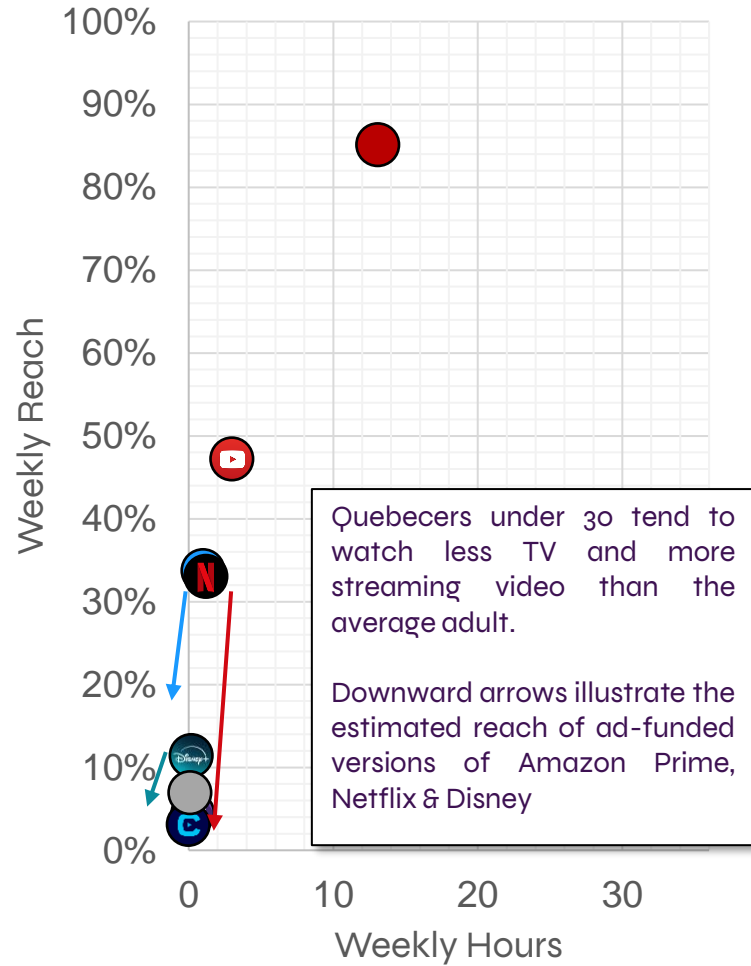




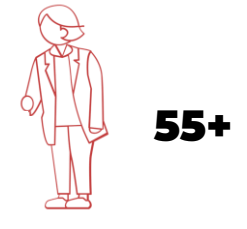
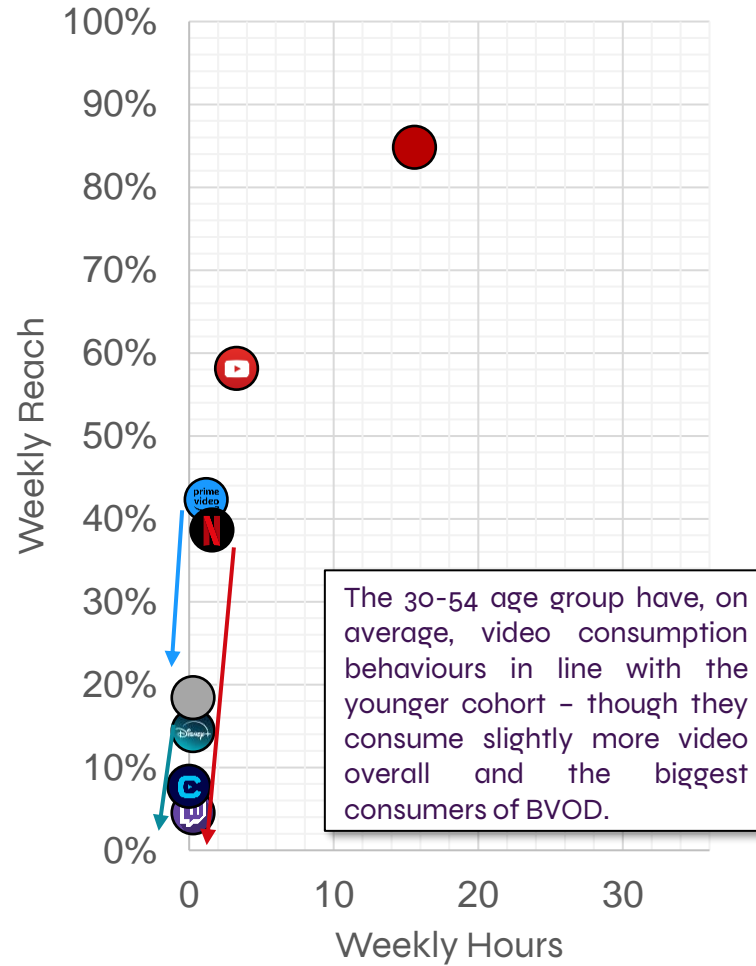
# Video Preferences by Age



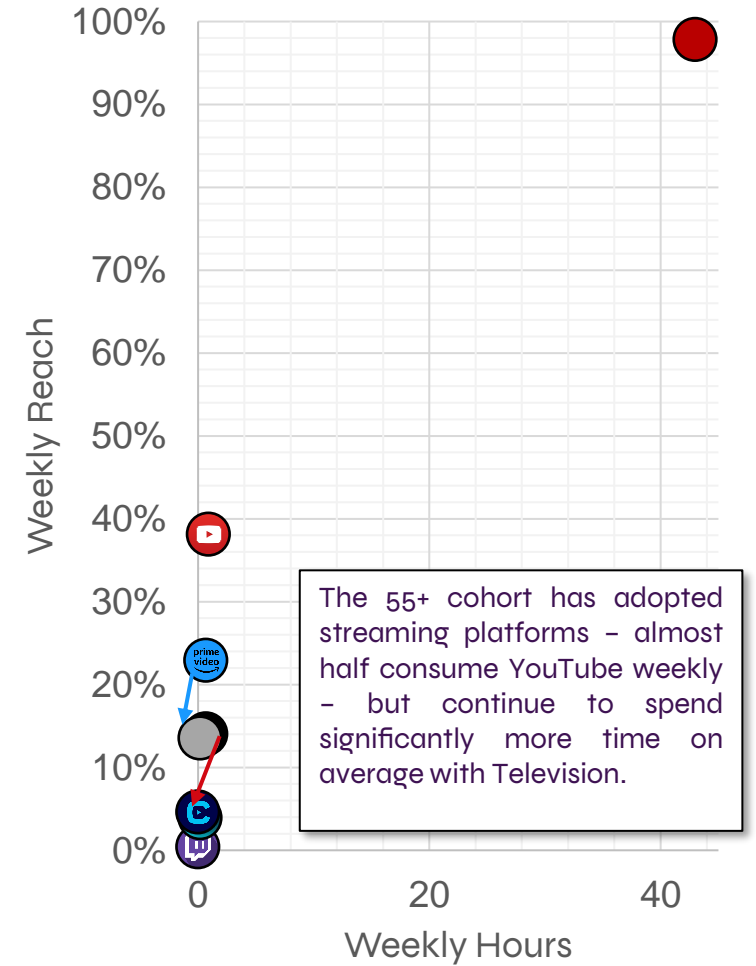
**Under 30**



**30-54**



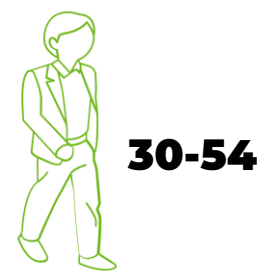
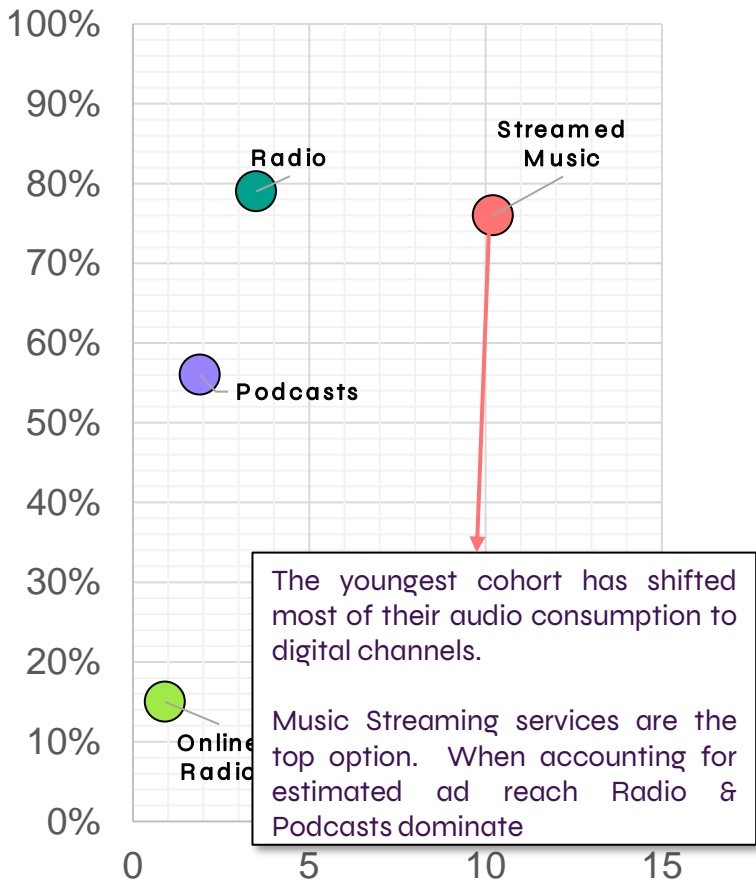
**55+**



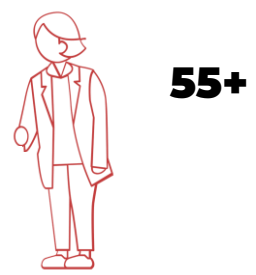
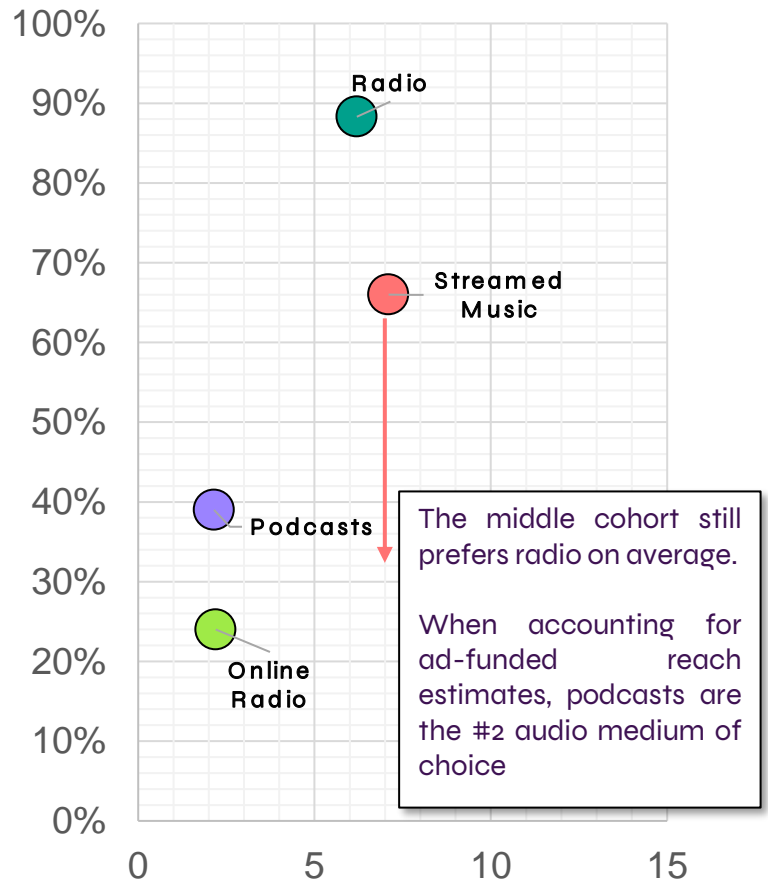
# Audio Preferences by Age



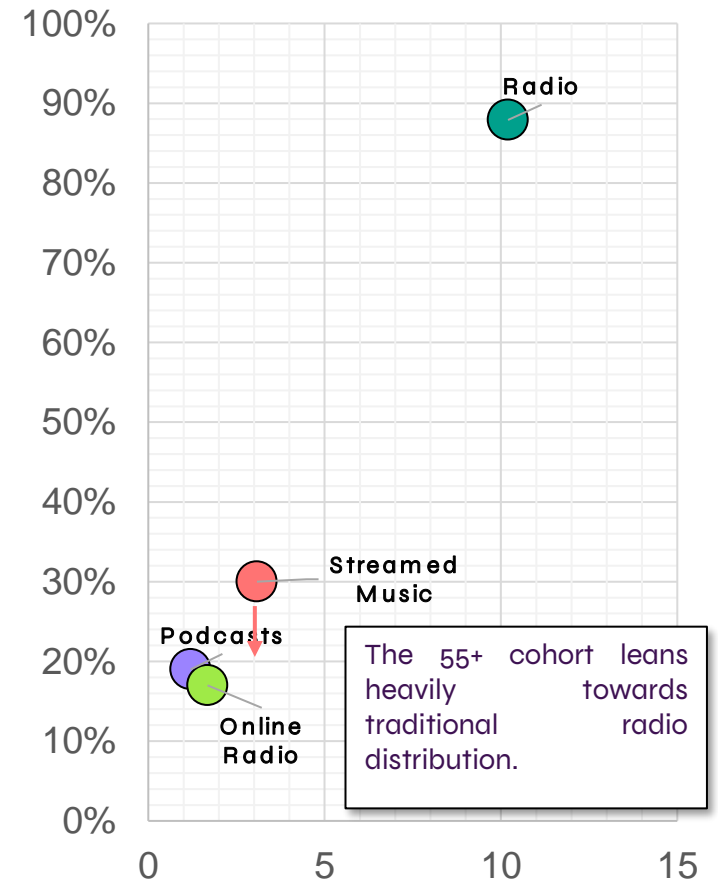
**Under 30**



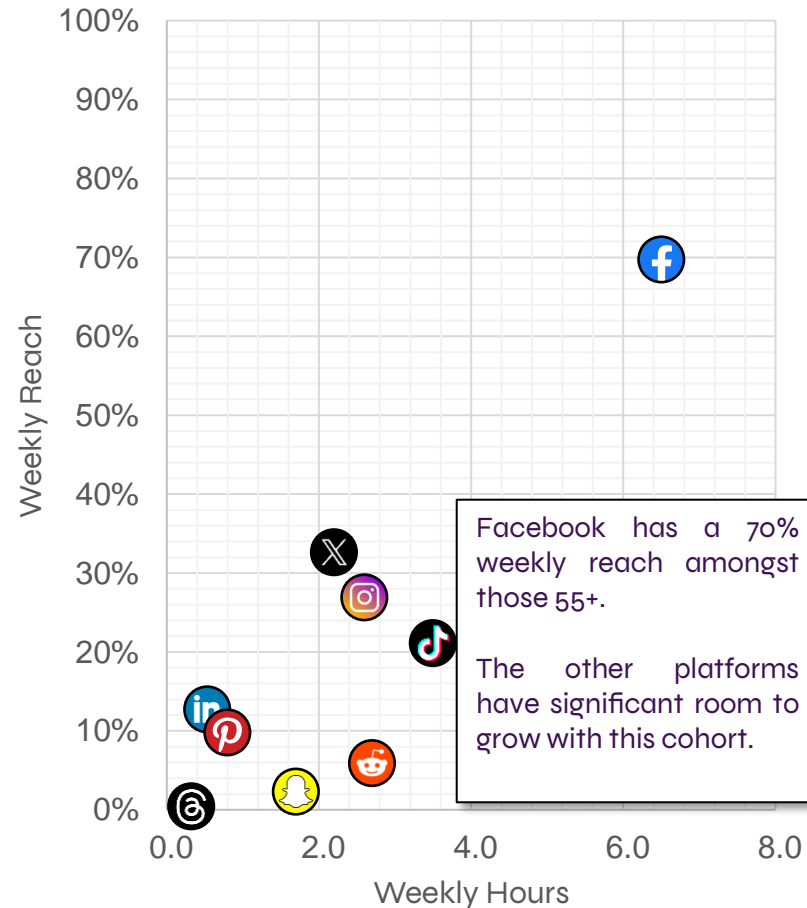
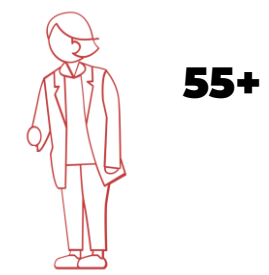
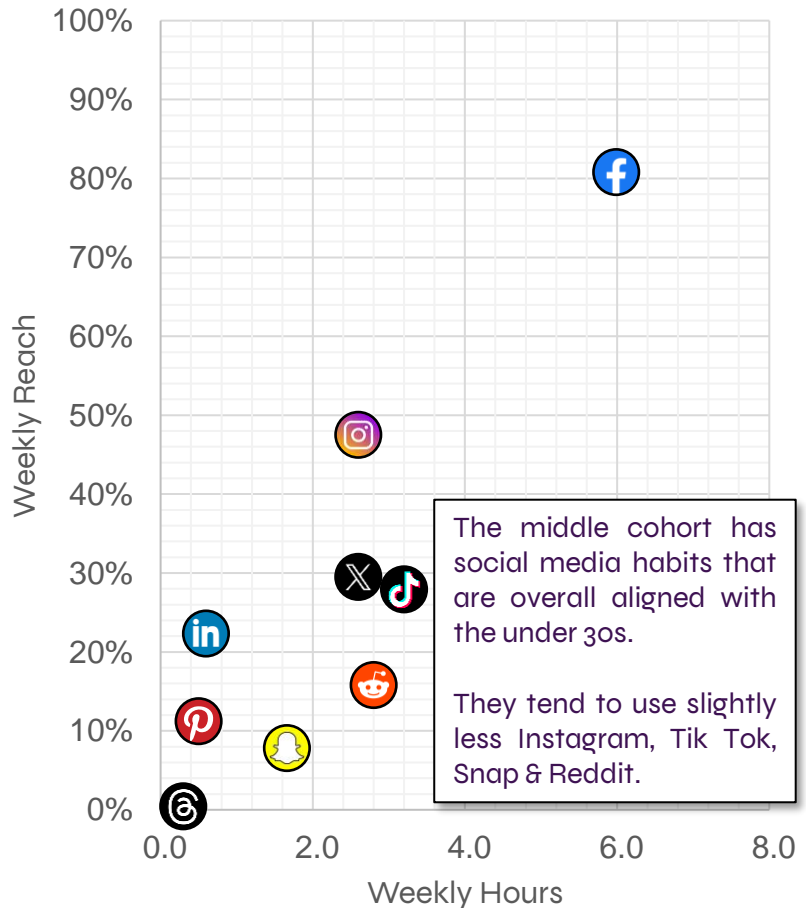
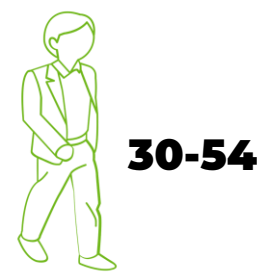
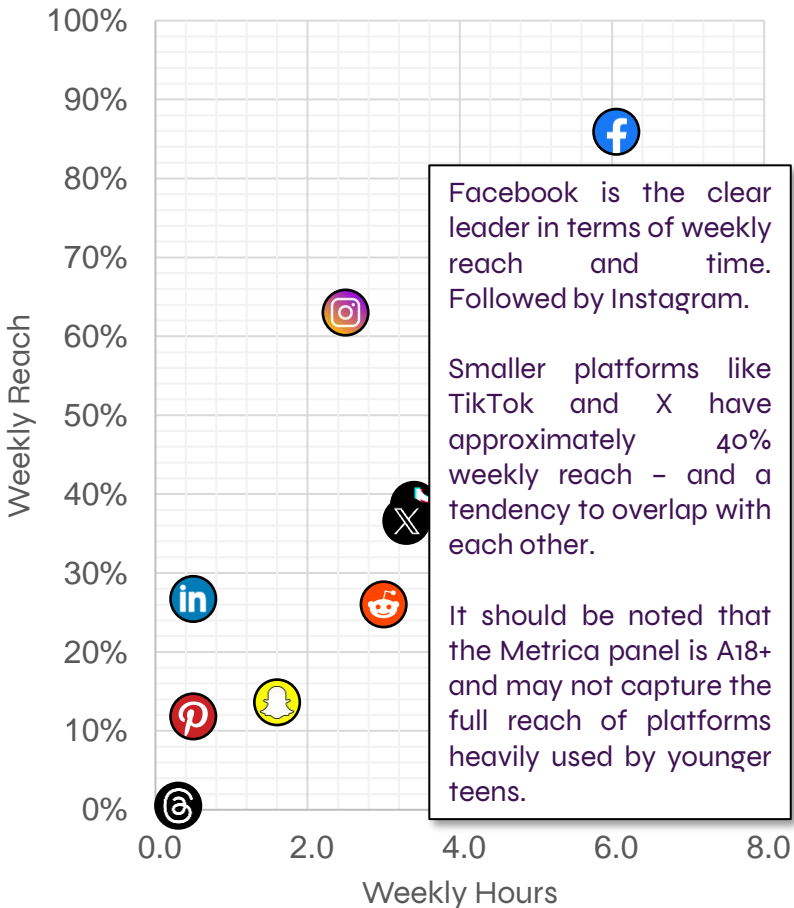
**30-54**



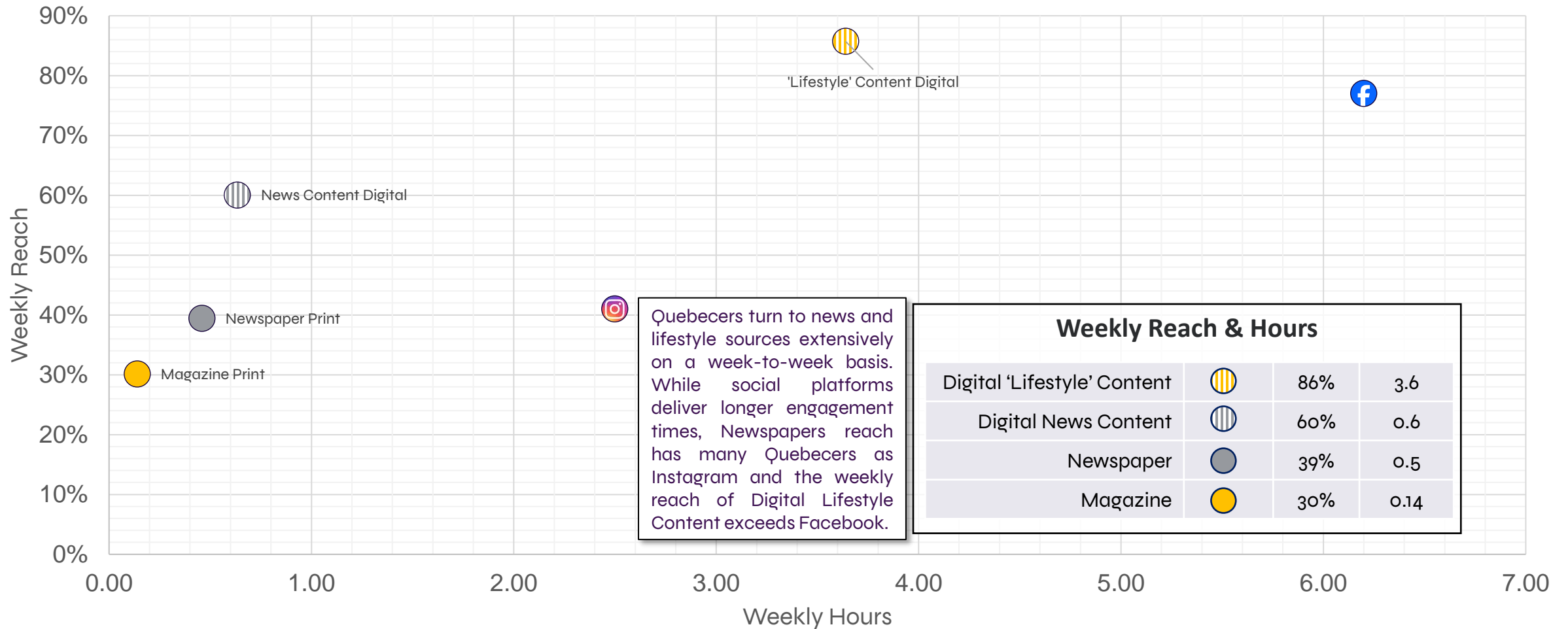
**55+**



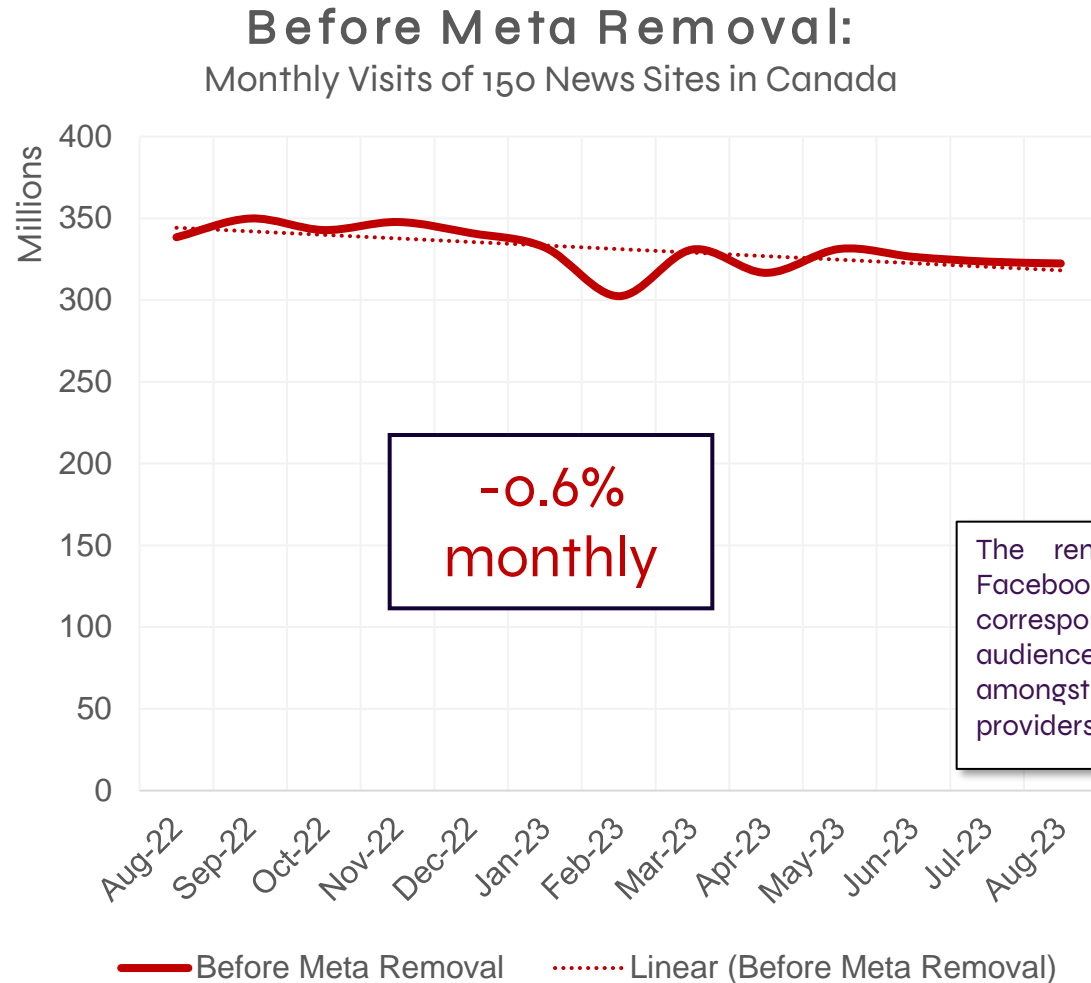
# Social Preferences by Age



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



# News Consumption Appears to have Stabilized Post Meta Removal



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

