ACA Webinars:

Canadian Advertising Spend:
A Look Back on 2021 to Inform the Market for 2022

February 3 2022

Driving
Marketing
Success

HOW WE SUPPORT YOU

The ACA provides support to you and your team in a variety of ways on a wide range of MarCom subjects.

Consultations
ACA offers unique value-added confidential consultation services that no other association can match. We offer support on a wide range of topics, from production consultation, agency relations, in-house services and more.

Publications
Support your marketing decision with insights and intelligence from our collection of best-practice documents and research.

Committees
Join a committee to pinpoint vital issues that impact the effectiveness of our members’ marketing communications, while enhancing your professional development

Webinars
Gain practical take-aways from both our live and pre-recorded catalogue of webinars. Informative and insightful, our webinars are led by subject-matter experts and cover the latest MarCom issues and emerging trends.

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Gain front-of-the-line access to premier industry events for continued learning and networking with peers and top industry professionals.

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Driving Marketing Success

STANDARD MEDIA INDEX OVERVIEW

Global partnership model with major holding company agencies and leading independents. HQ'd in NYC since 2011, Canada launch in 2020.

Clean and harmonize client level data for faster and better reporting, insights, trends, and forward-pacing.

Produce category, spend and cost level insights which then becomes SMI data products. Clients include publishers, finance, consulting, brands and tech.

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CANADIAN PARTNER AGENCY ROSTER

Coverage is 94% of agency market in Canada

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STANDARD MEDIA INDEX REPORTING

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CANADA VS. GLOBAL MARKETS

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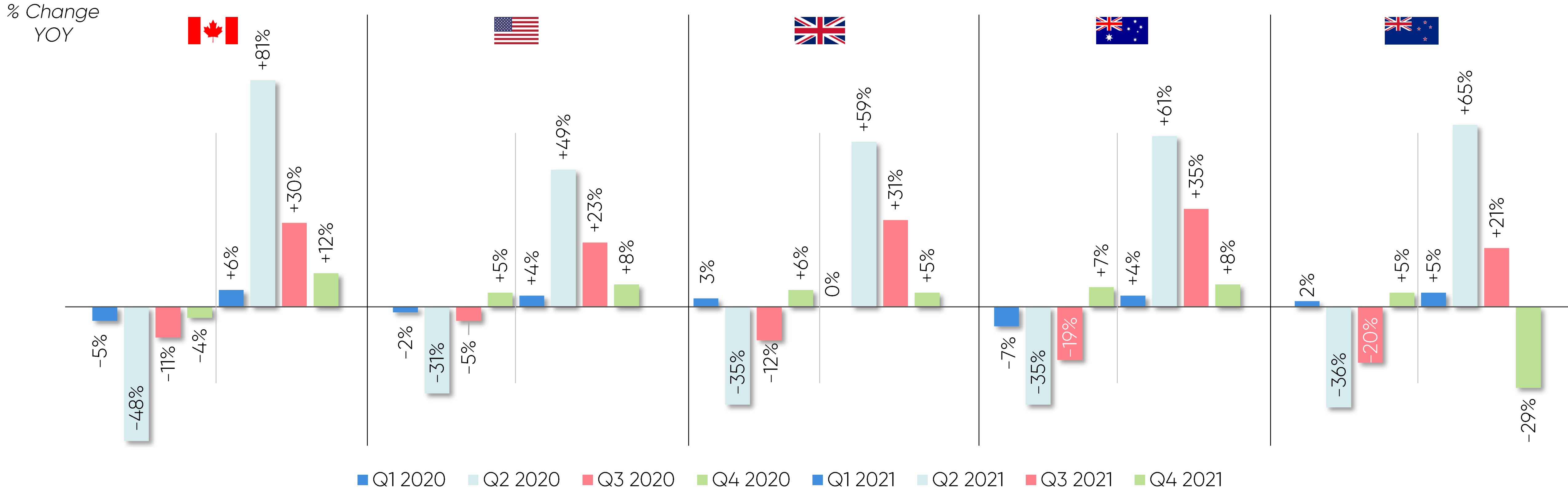
ALTHOUGH SLOWER IN RECOVERY THAN OTHER ENGLISH-LANGUAGE MARKETS, CANADA SAW YOY GROWTH IN EVERY QUARTER OF 2021

Cross-Media National Brand Ad Investment
Quarterly YoY Percent Change



Source: SMI Pool | Markets Include US, CA, UK, AU, NZ
Media Formats Include: TV, Magazines, Newspapers, OOH/Cinema, Radio, and Digital
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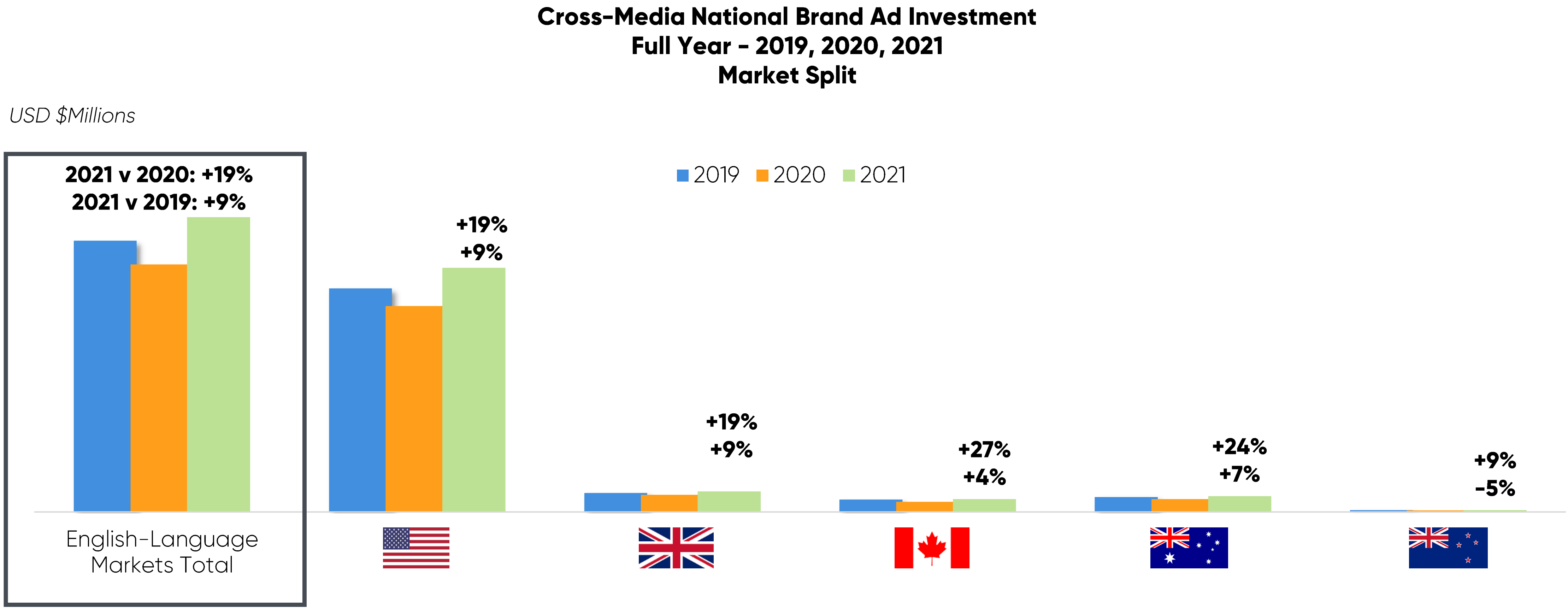
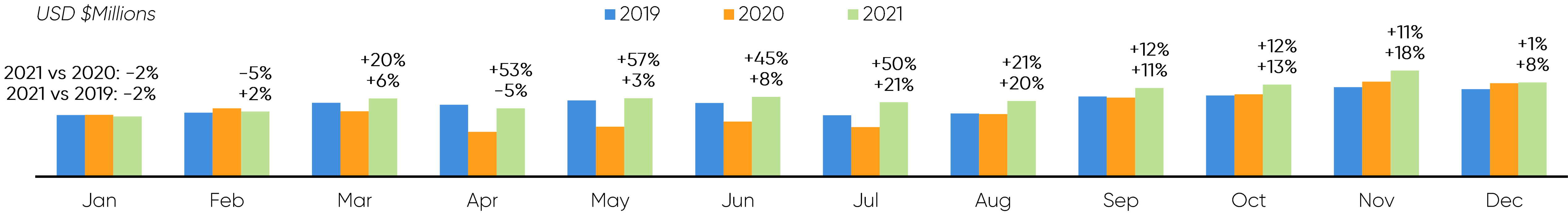
ENGLISH-LANGUAGE MARKETS FINISH THE YEAR UP, CANADA ON PAR

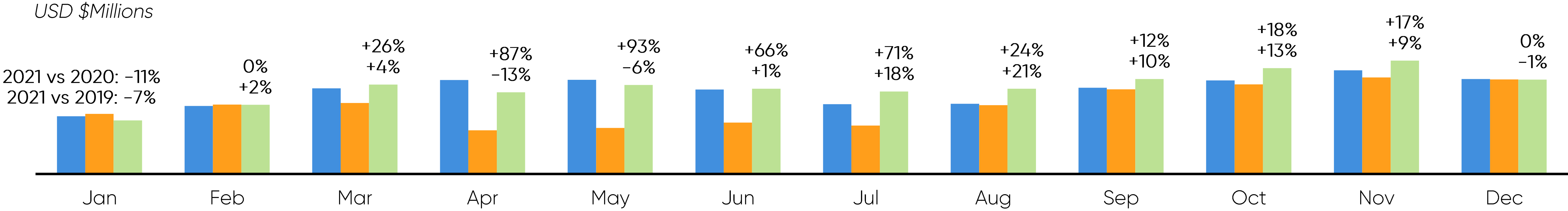


ENGLISH-LANGUAGE MARKETS SAW EIGHT CONSECUTIVE MONTHS OF GROWTH VS BOTH 2020 & 2019, CANADA NOT FAR BEHIND WITH SIX

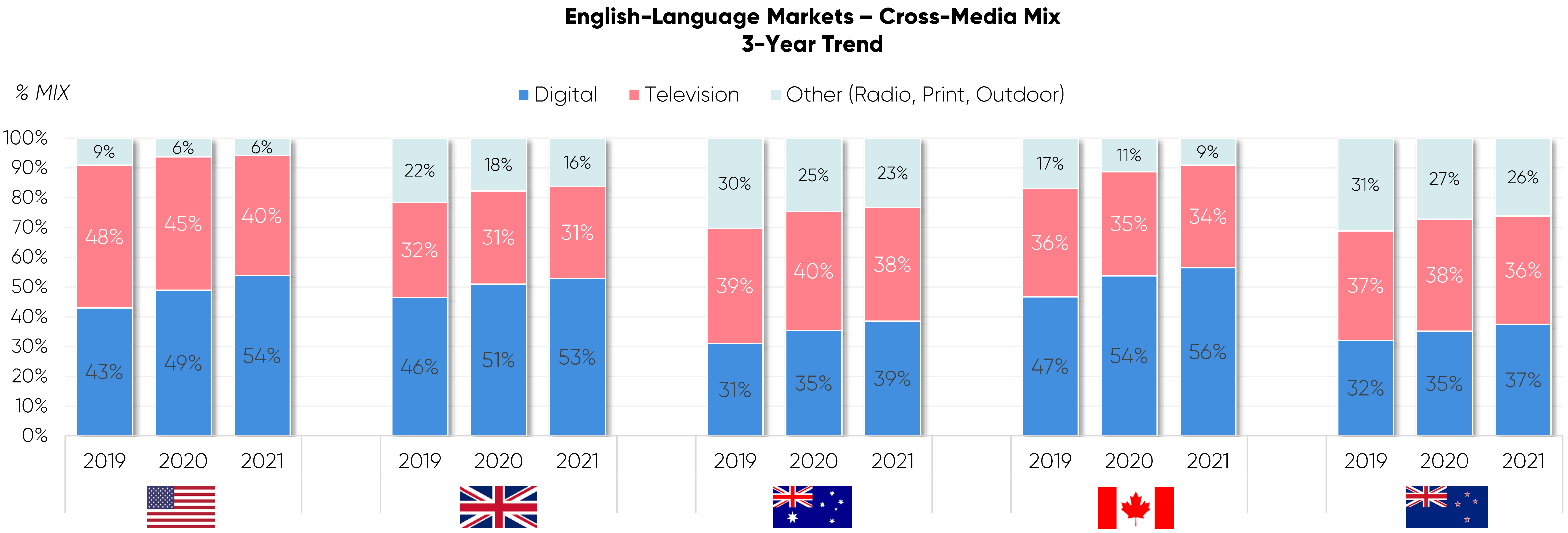
English-Language Markets – Cross Media Investment Seasonality
3-Year Trend



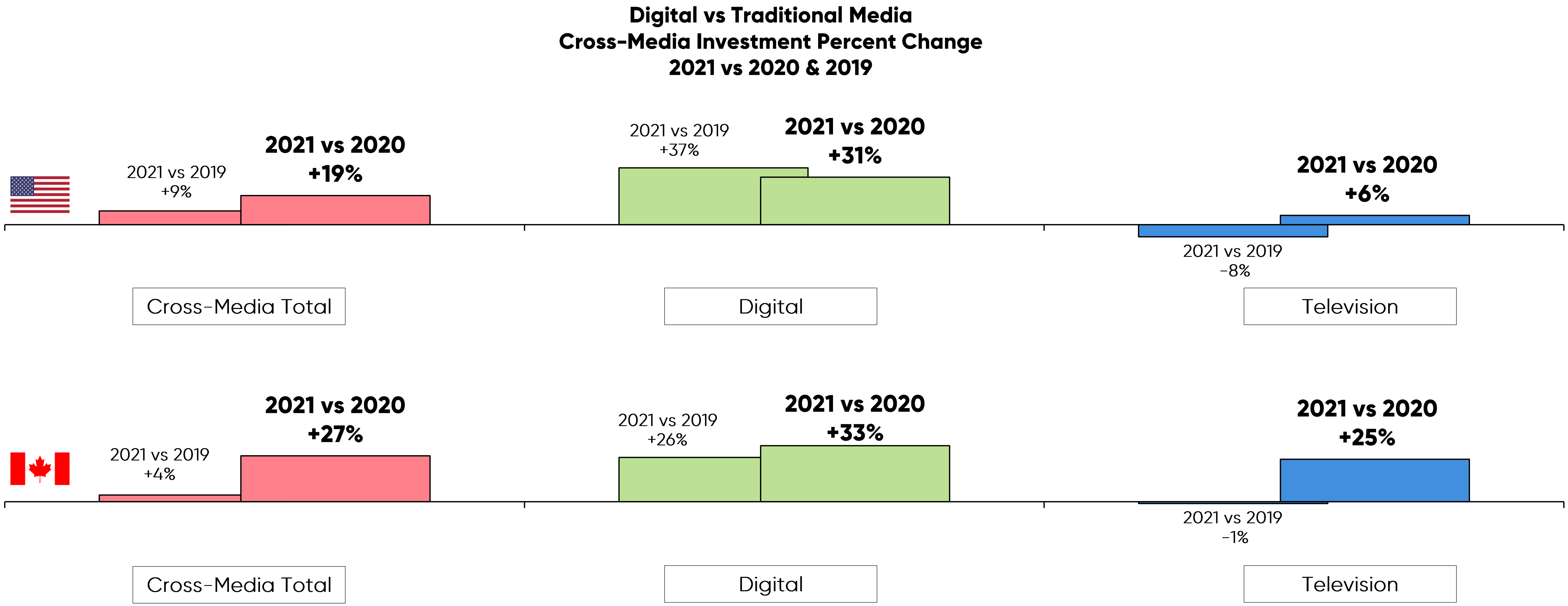
CANADA Market – Cross-Media Investment Seasonality
3-Year Trend



SHIFT TO DIGITAL MEDIA ACCELERATED BY THE PANDEMIC CONTINUES, CANADA SAW HIGHEST DIGITAL SHARE OF ALL ENGLISH-LANGUAGE MARKETS



CANADIAN LINEAR TV FINISHED 2021 IN A STRONGER POSITION VS US



Source: SMI Pool | Markets Include US and CA
Media Formats Include: TV, Magazines, Newspapers, OOH/Cinema, Radio, and Digital
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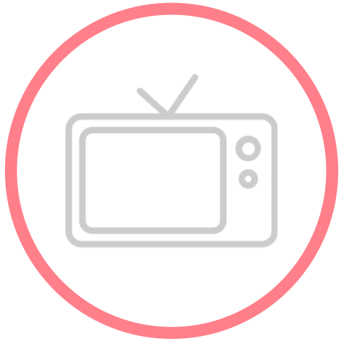
KEY TAKEAWAYS

ENGLISH-LANGUAGE MARKETS SOLIDIFY PANDEMIC RECOVERY POSITION FINISHING 2021 +19% VS 2020 AND +9% VS 2019

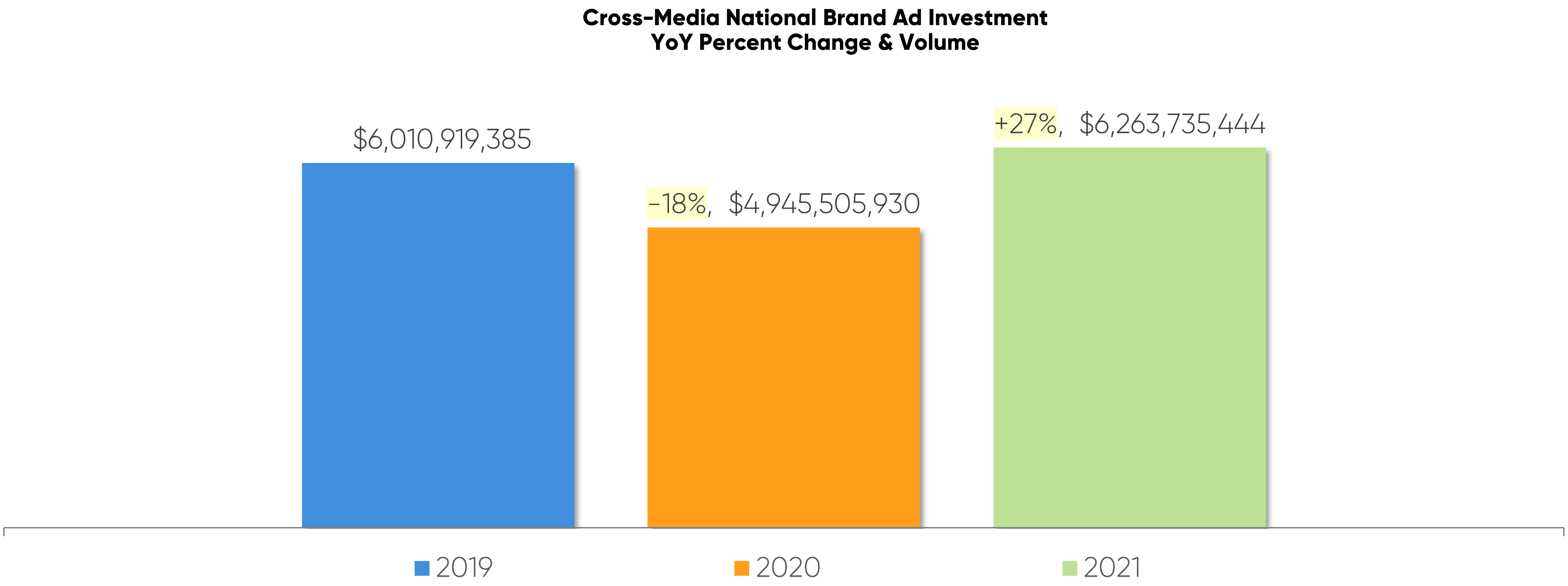
DIGITAL SHARE CONTINUES GROWTH TRAJECTORY IN ALL MARKETS, WITH CANADA AT THE HIGHEST (56%)



LINEAR TELEVISION STILL STRONG TAKING <30% SHARE IN ALL MARKETS, CANADA FINISHING RELATIVELY FLAT TO 2019 INVESTMENT LEVELS

CANADIAN MARKET FOCUS

CANADIAN NATIONAL BRAND AD SPEND EXCEEDS BOTH PRIOR YEARS



Source: SMI Pool | Markets Include Canada
Media Formats Include: TV, Magazines, Newspapers, OOH/Cinema, Radio, and Digital
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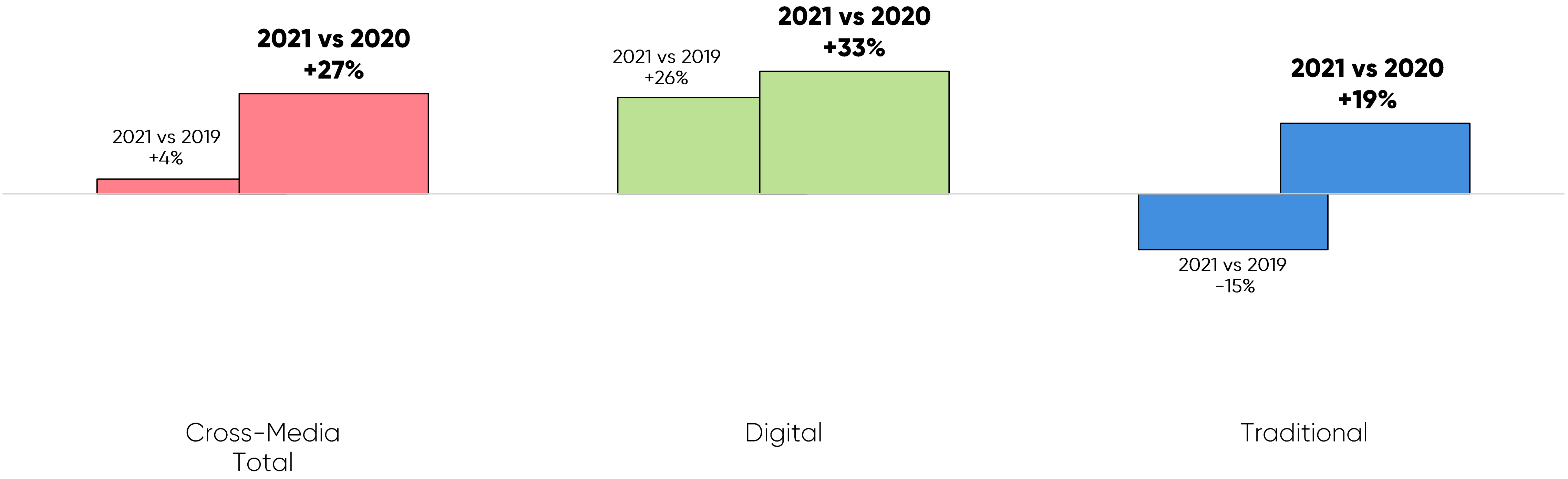
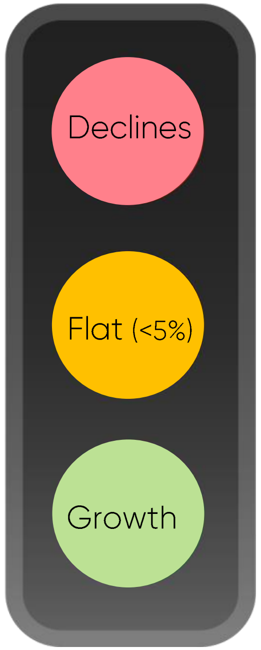
TRADITIONAL MEDIA STILL STRUGGLING TO MEET PRE-PANDEMIC LEVELS WHILE DIGITAL FUELS GROWTH

Digital vs Traditional Media
Cross-Media Investment Percent Change
2021 vs 2020 & 2019



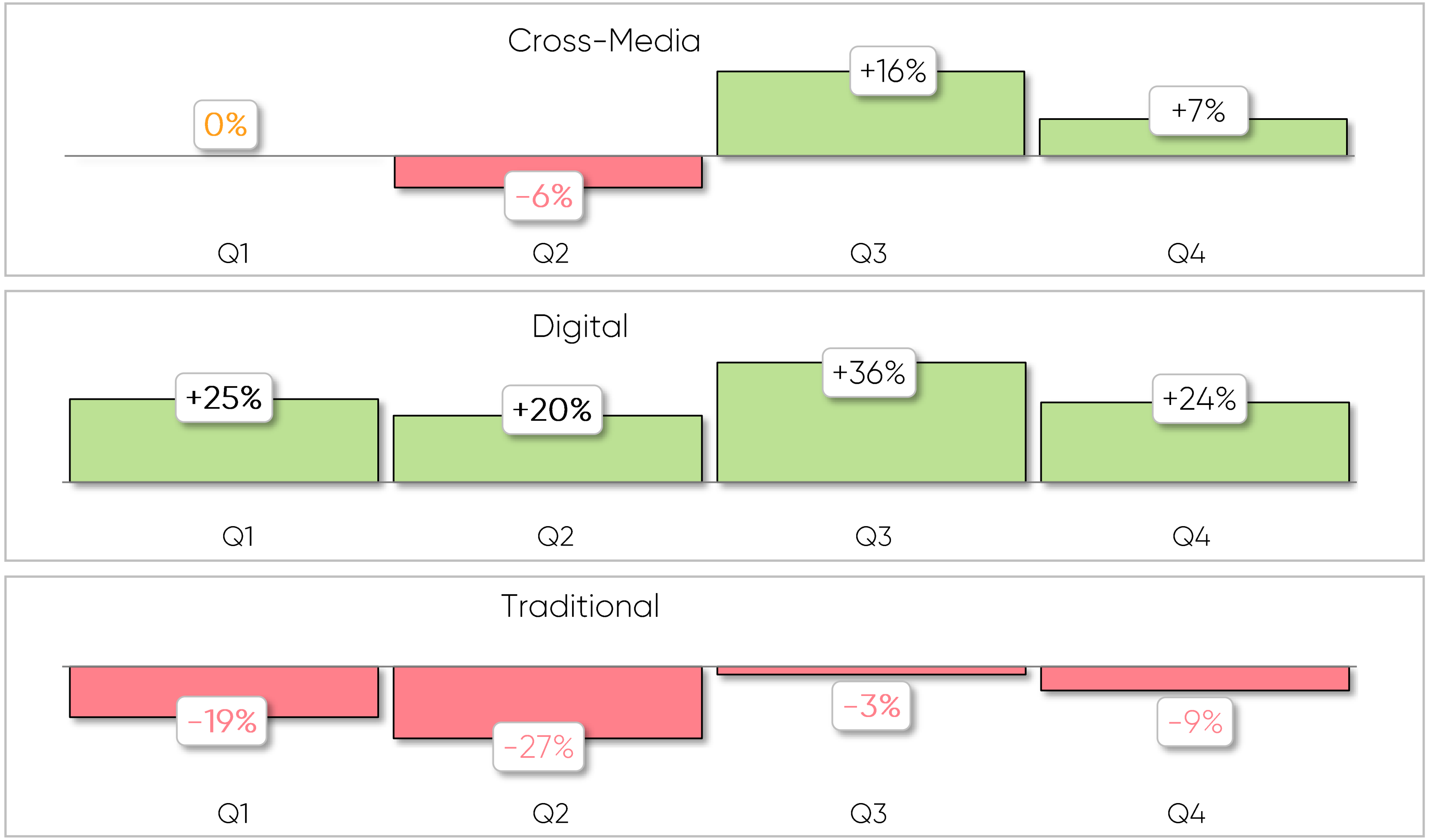
2021 SIGNALED THE START OF A RECOVERY FOR THE CANADIAN AD MARKET

WITH MEDIA INVESTMENT LEVELS SITTING WELL BELOW THE NORM IN 2020, COMPARING TO 2019 IS THE REAL BENCHMARK FOR GROWTH

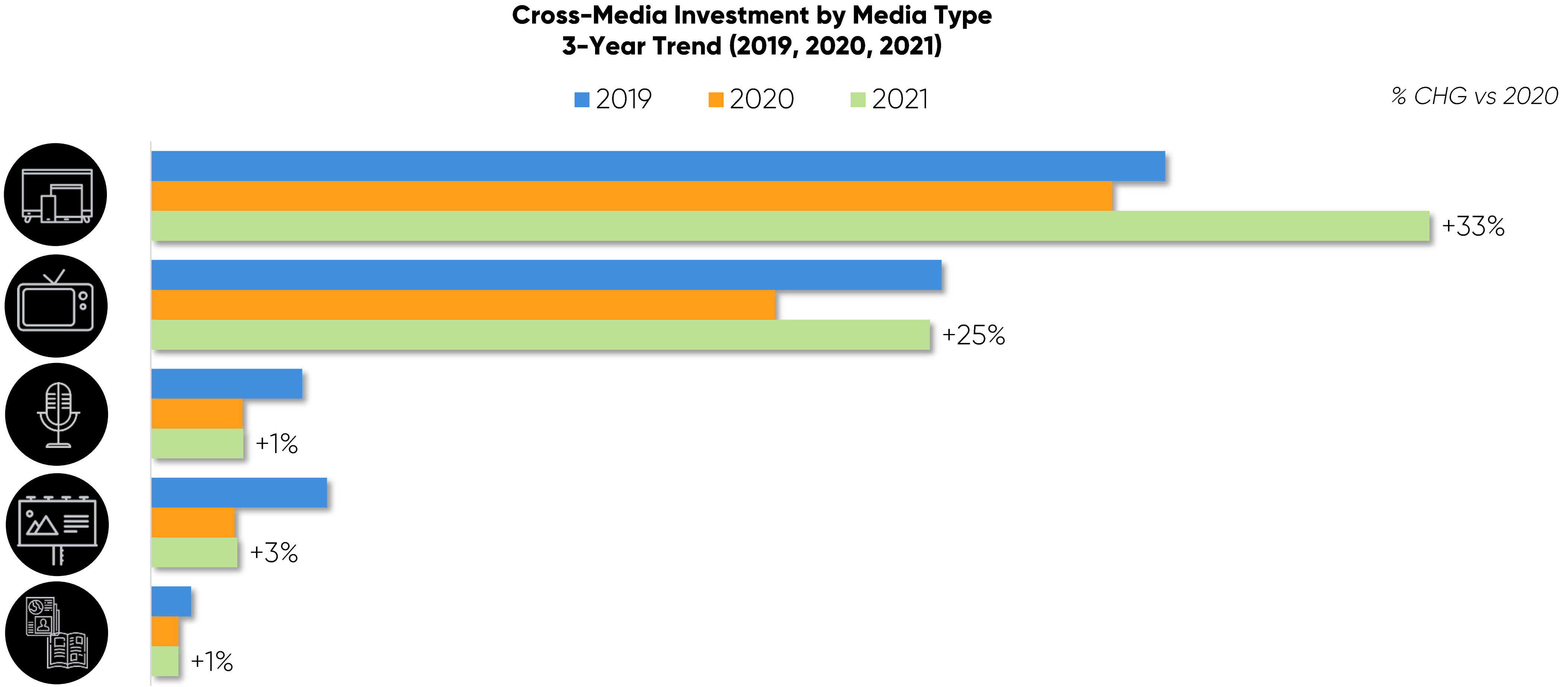


Canada's Recovery Journey

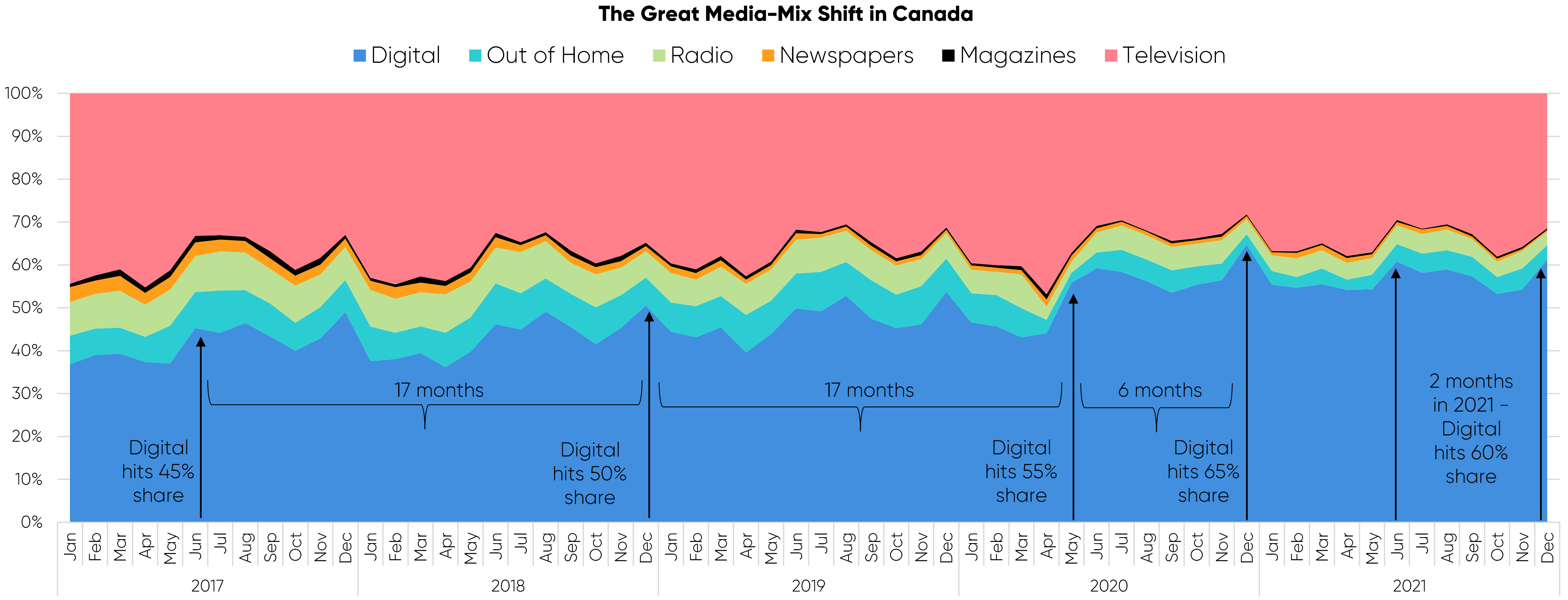
National Brand Ad Spend
2021 vs 2019, YoY Percent Change by Quarter



ALL MEDIA TYPES FINISHED 2021 ABOVE 2020 INVESTMENT LEVELS



DIGITAL SHARE HAS BEEN GROWING STEADILY SINCE 2017 BUT WAS GREATLY ACCELERATED BY THE PANDEMIC, PEAKING IN DECEMBER OF 2020



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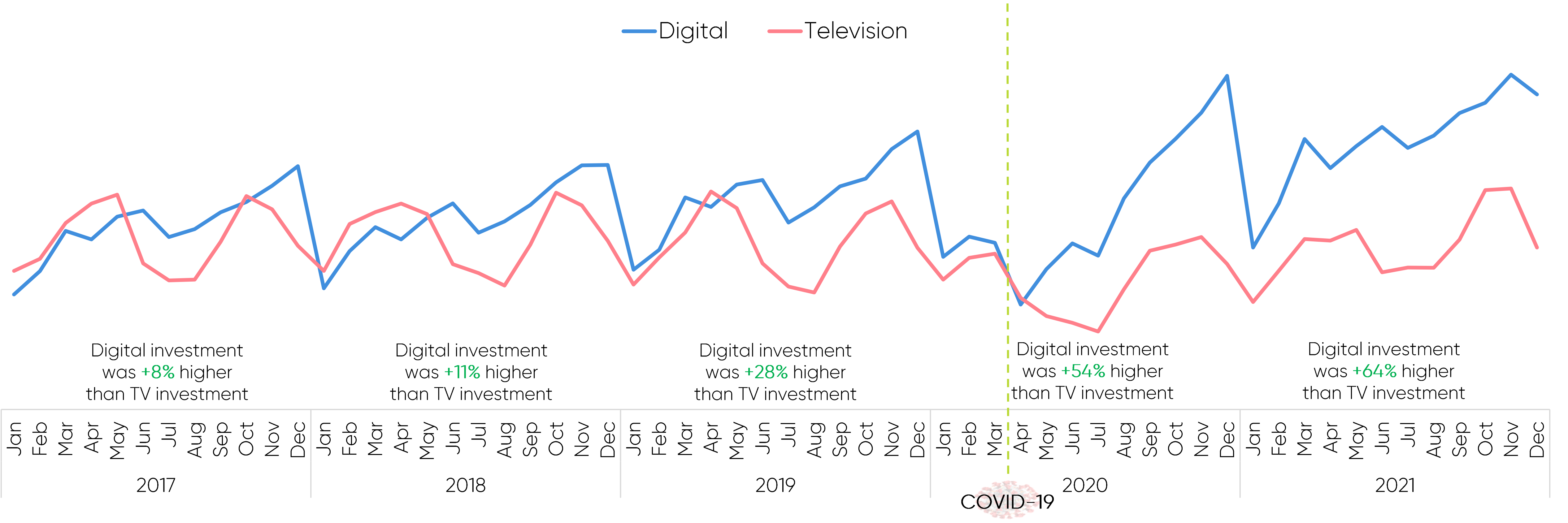
DIGITAL SPEND HAS BEEN HIGHER THAN TV SPEND SINCE AT LEAST 2017, BUT THE PANDEMIC CREATED A DELTA THAT ISN'T GOING AWAY

Canadian Monthly National Ad Spend by Digital and TV
Jan 2017 – Dec 2021



Source: SMI Pool | Markets Include Canada
Media Formats Include: TV and Digital
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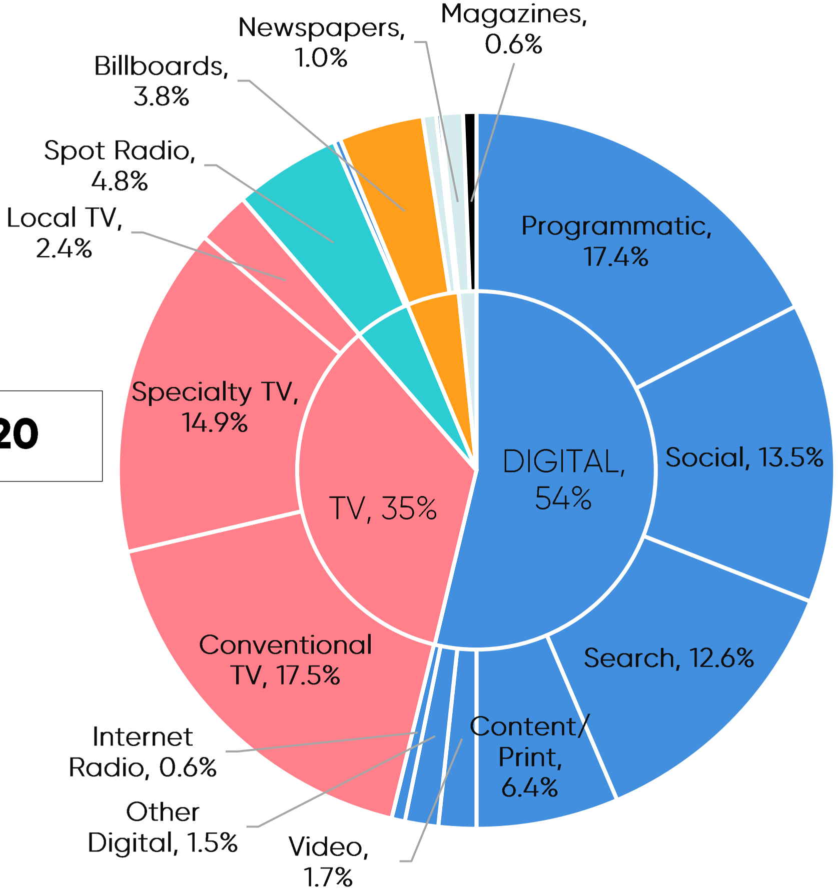
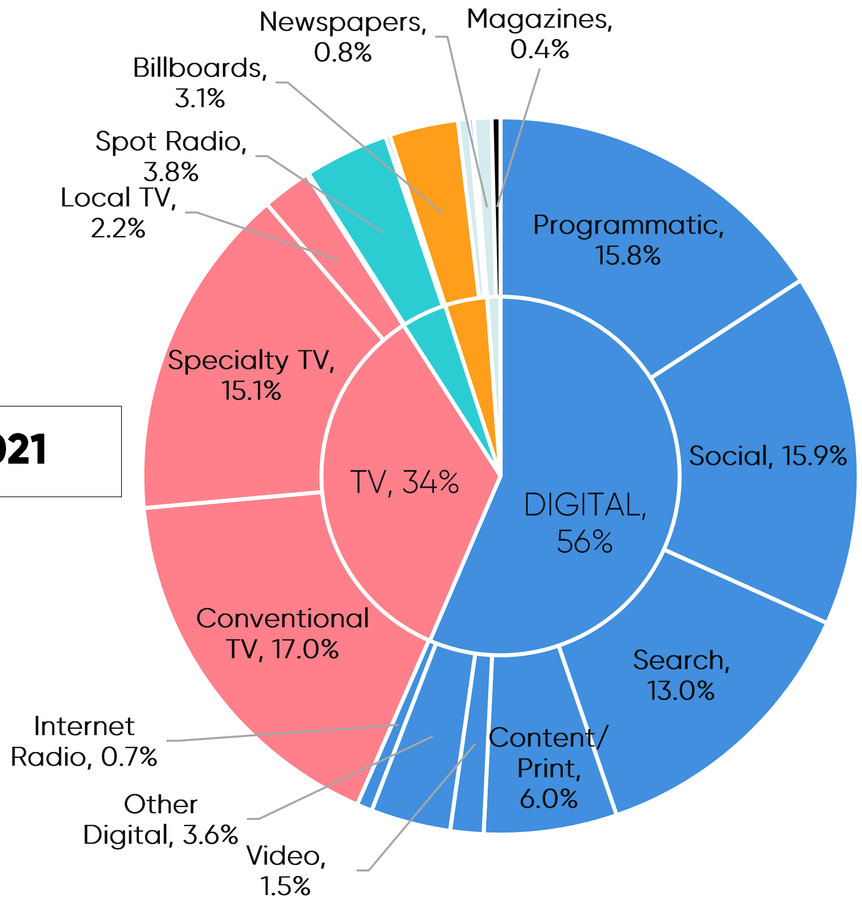
SPECIALTY AND CONVENTIONAL TV SHARE STAYS RELATIVELY FLAT, WHILE DIGITAL GROWTH IS DRIVEN BY SOCIAL AND SEARCH

Cross-Media National Brand Ad Spend, Share by Media Sub-Type Full Year 2021 vs 2020

2020



2021

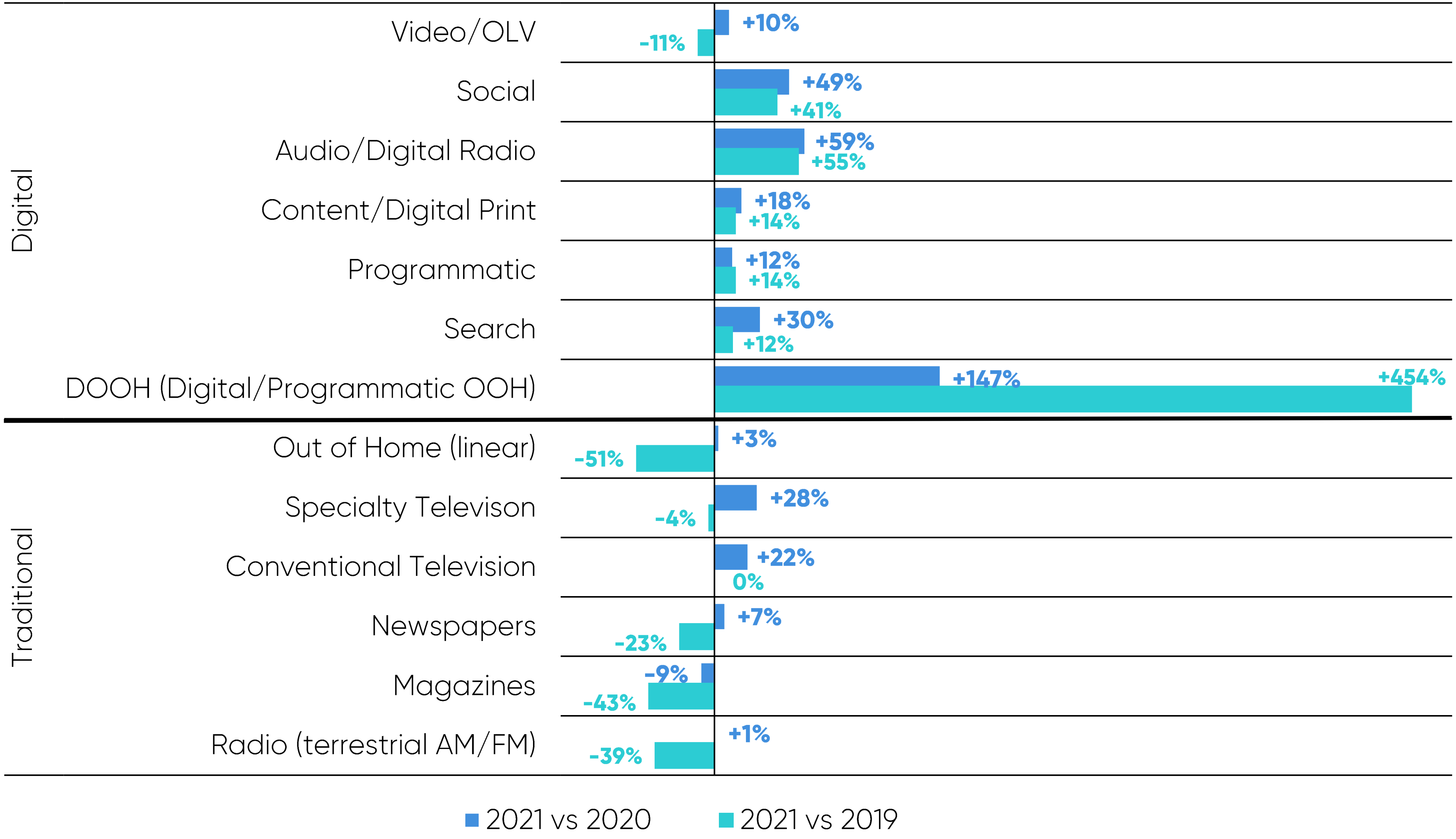


VIDEO/OLV WAS DOWN VS 2019, BUT ALL OTHER DIGITAL SUB-TYPES SAW GROWTH

DIGITAL AUDIO & DOOH SAW THE GREATEST INCREASES

MOST TRADITIONAL MEDIA TYPES FACED DECLINES VS 2019
EXCEPT FOR LINEAR TELEVISION

Media Sub-Type Revenue Trend
National Brand Advertising Spend
2021 vs 2020 & 2019



Source: SMI Pool | Markets Include Canada
Media Formats Include: TV, Magazines, Newspapers, OOH/Cinema, Radio, and Digital
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The Digital portion of OOH includes the representative programmatic OOH DSPs. The volume amount has been removed from Programmatic to avoid duplication – please reach out to SMI for the owners that were included

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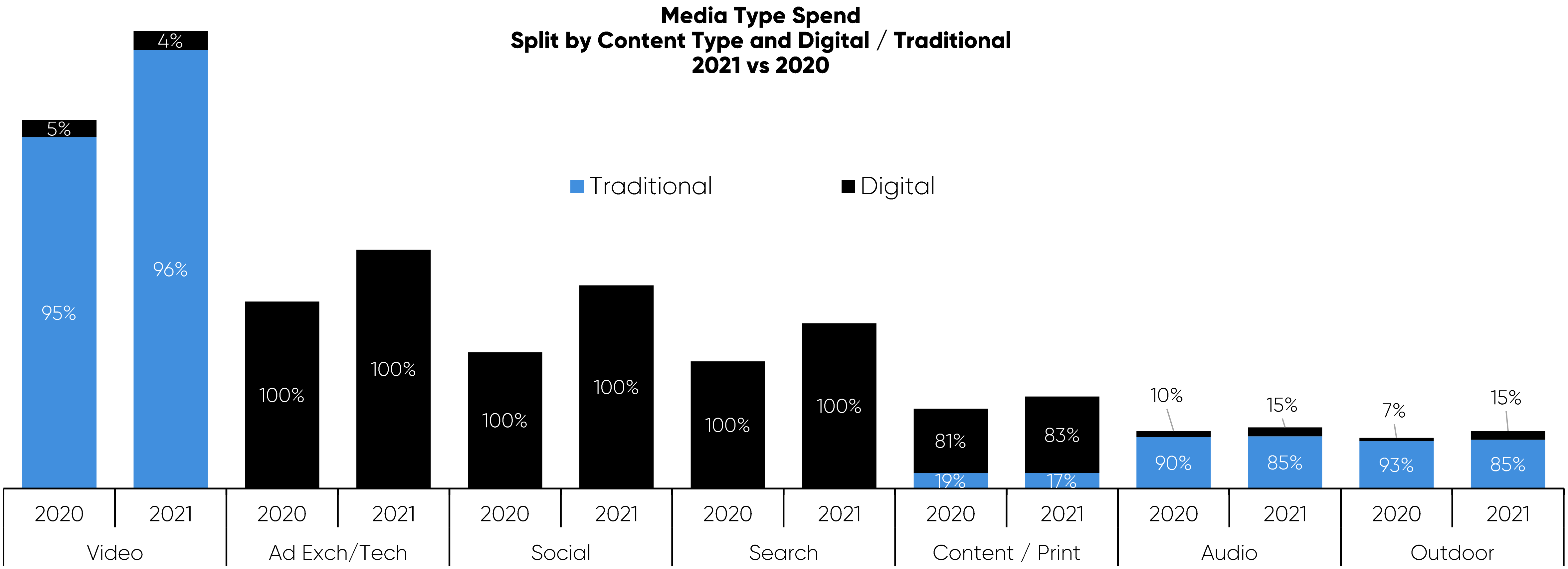
VIDEO INVESTMENT IS LARGELY LINEAR BUT IS SEEING VOLUME GROWTH, DESPITE DIGITAL SHARE DECREASING



Source: SMI Pool | Markets Include Canada
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The Digital portion of OOH includes the representative programmatic OOH DSPs. The volume amount has been removed from Programmatic to avoid duplication – please reach out to SMI for the owners that were included

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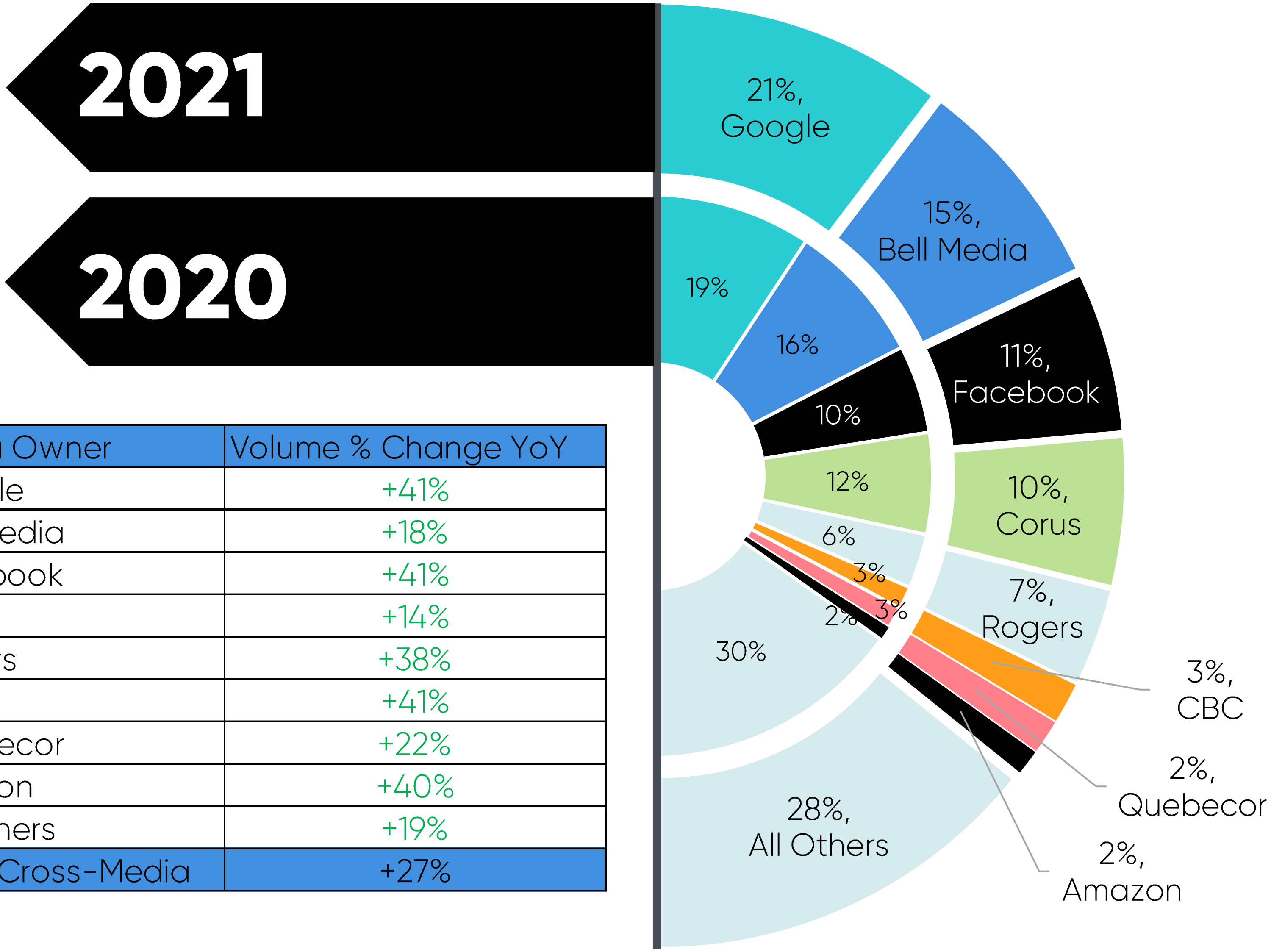
Cross-Media: Media Owner Share %
2021 v 2020

THESE TOP MEDIA OWNERS COMBINED HOLD A **71%** SHARE OF ALL NATIONAL BRAND AD SPEND

THEY ALL SAW YOY VOLUME GROWTH, HOWEVER ONLY GOOGLE, FACEBOOK, AND ROGERS GREW THEIR SHARE



Media Owner	Volume % Change YoY
Google	+41%
Bell Media	+18%
Facebook	+41%
Corus	+14%
Rogers	+38%
CBC	+41%
Quebecor	+22%
Amazon	+40%
All Others	+19%
Total Cross-Media	+27%

KEY TAKEAWAYS

CANADA FINISHED 2021 UP VS BOTH 2020 & 2019, ALL MEDIA TYPES SAW GROWTH VS 2020, RADIO, OOH, AND PRINT STILL SEEING DECLINES VS 2019

DIGITAL SHARE DRIVEN BY SEARCH AND SOCIAL, DIGITAL AUDIO AND DIGITAL OOH ARE SEEING HUGE GROWTH THAT WILL LIKELY CONTINUE INTO 2022

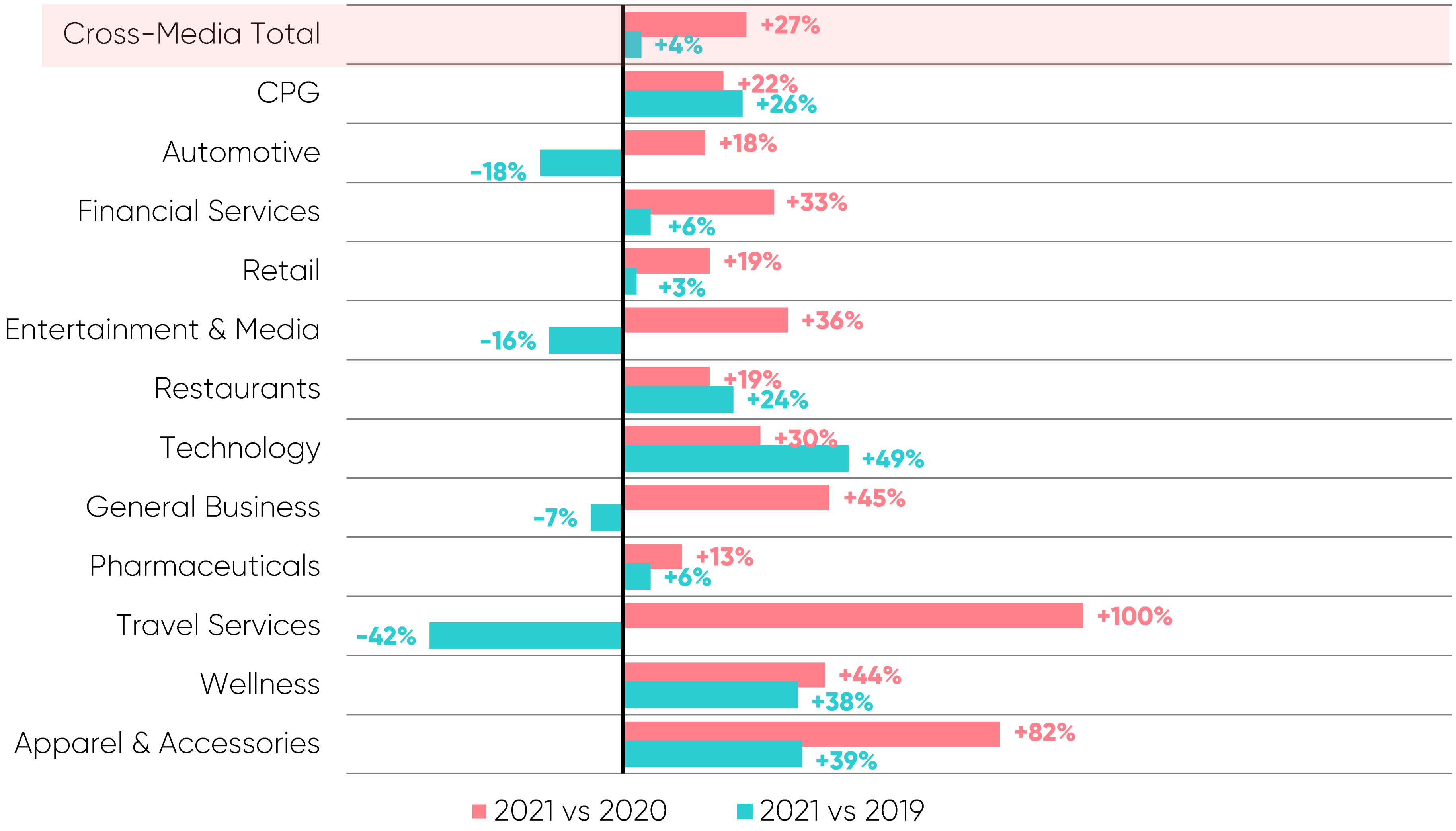
VIDEO INVESTMENT STILL LARGELY LINEAR;
ALL TOP MEDIA OWNERS SAW AD REVENUE INCREASES VS LAST YEAR

PRODUCT CATEGORY ANALYSIS

ALL TWELVE OF SMI'S TRACKED PRODUCT CATEGORY GROUPS FINISHED 2021 IN A GROWTH POSITION VS 2020

MOST ALSO SAW INCREASED SPEND VS 2019, WITH ONLY AUTOMOTIVE, ENTERTAINMENT & MEDIA, GENERAL BUSINESS, AND TRAVEL SERVICES STILL FALLING SHORT OF 2019

Product Category Groups
Cross-Media National Brand Ad Spend - Percent Change
2021 vs 2020 & 2019

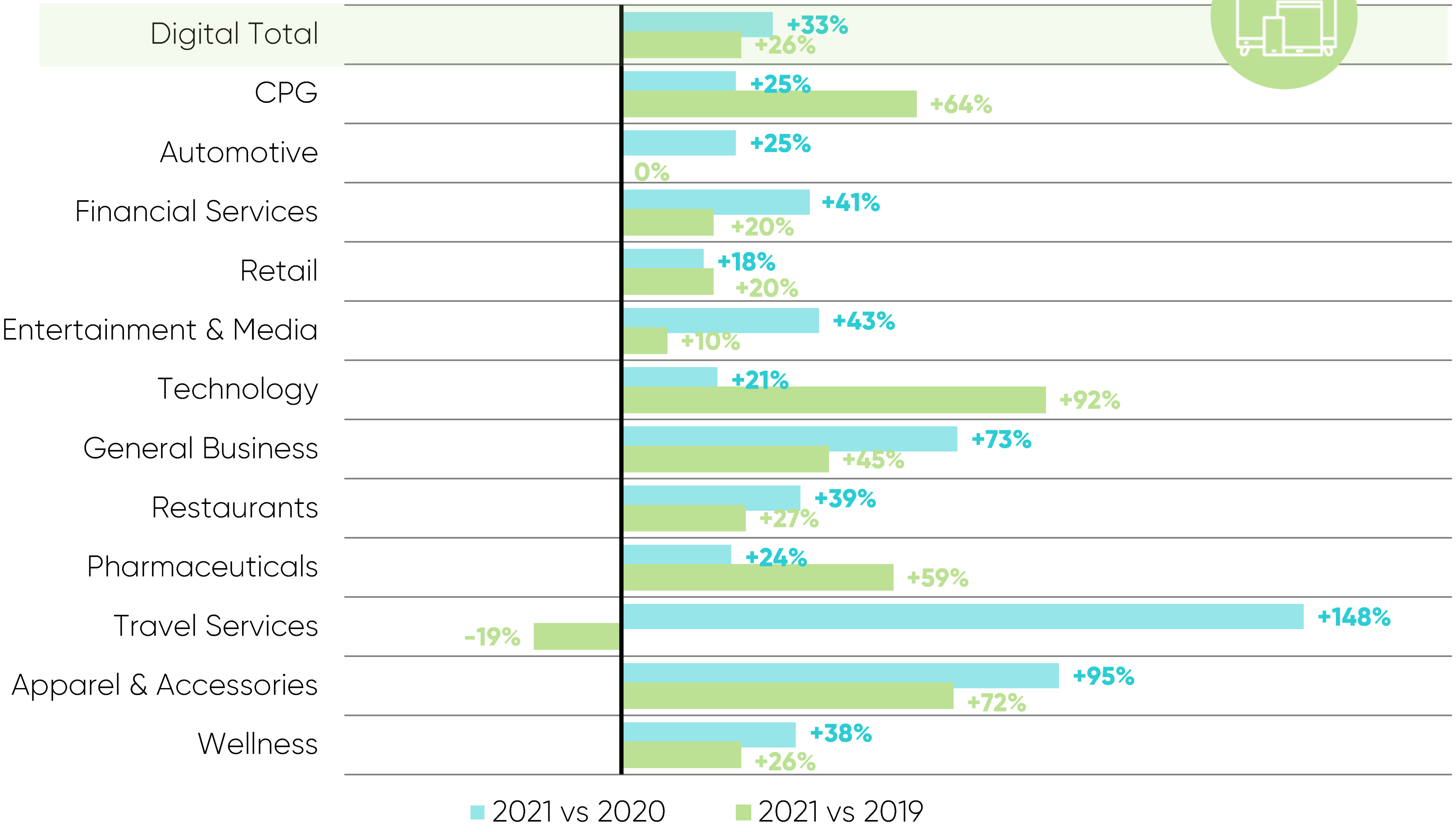


Ranked top to bottom on Full Year 2021 Volume Investment
Not Showing Product Category Group 'SMI Pool'

AS WITHIN CROSS-MEDIA, ALL TWELVE OF SMI'S TRACKED PRODUCT CATEGORY GROUPS FINISHED 2021 IN A GROWTH POSITION VS 2020 WITHIN DIGITAL

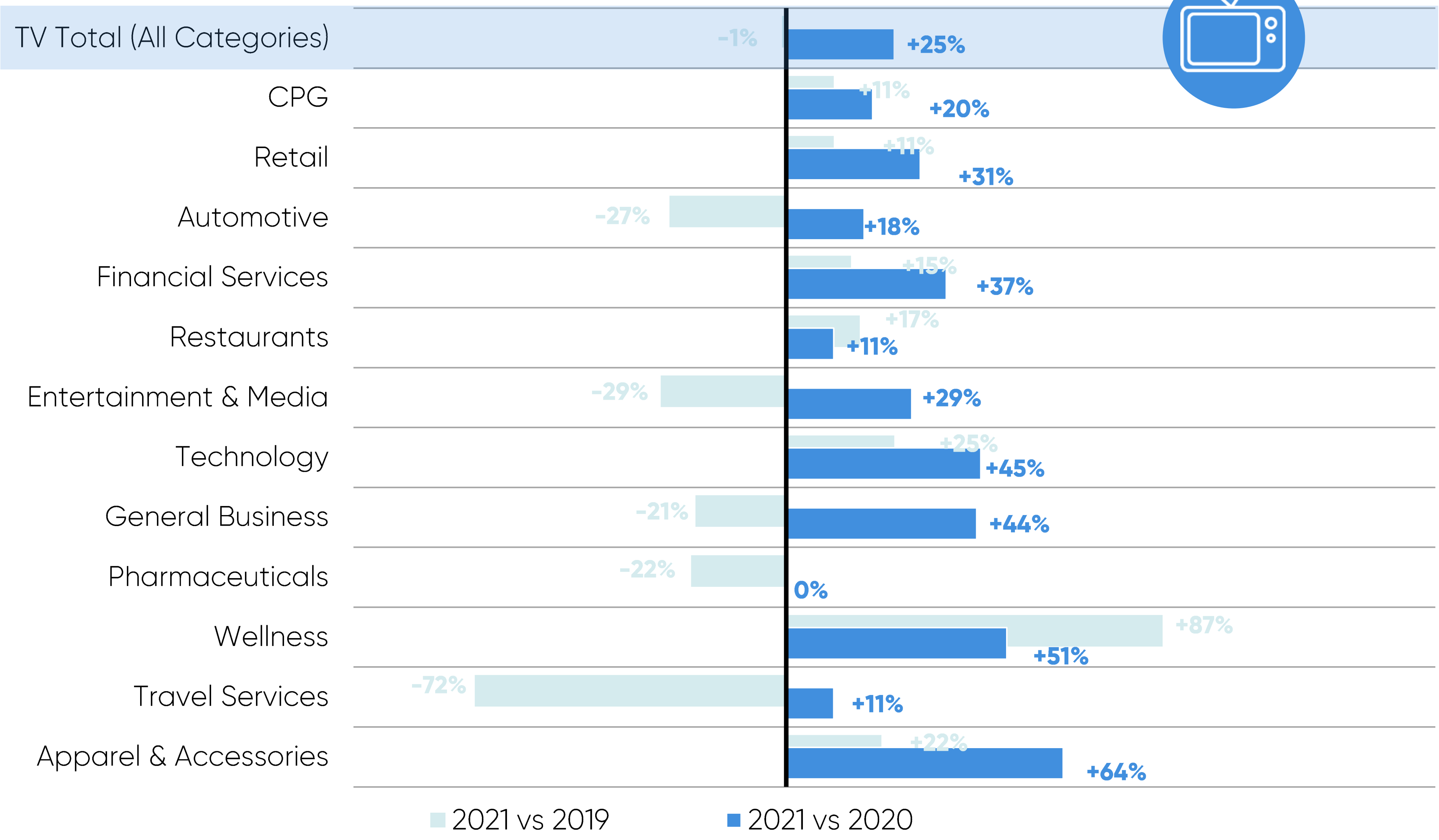
WHILE FOUR CATEGORIES FELL SHORT OF 2019 IN CROSS-MEDIA, TRAVEL WAS THE ONLY CATEGORY TO NOT MEET PRE-PANDEMIC DIGITAL SPEND

Product Category Groups
Digital National Brand Ad Spend - Percent Change
2021 vs 2020 & 2019

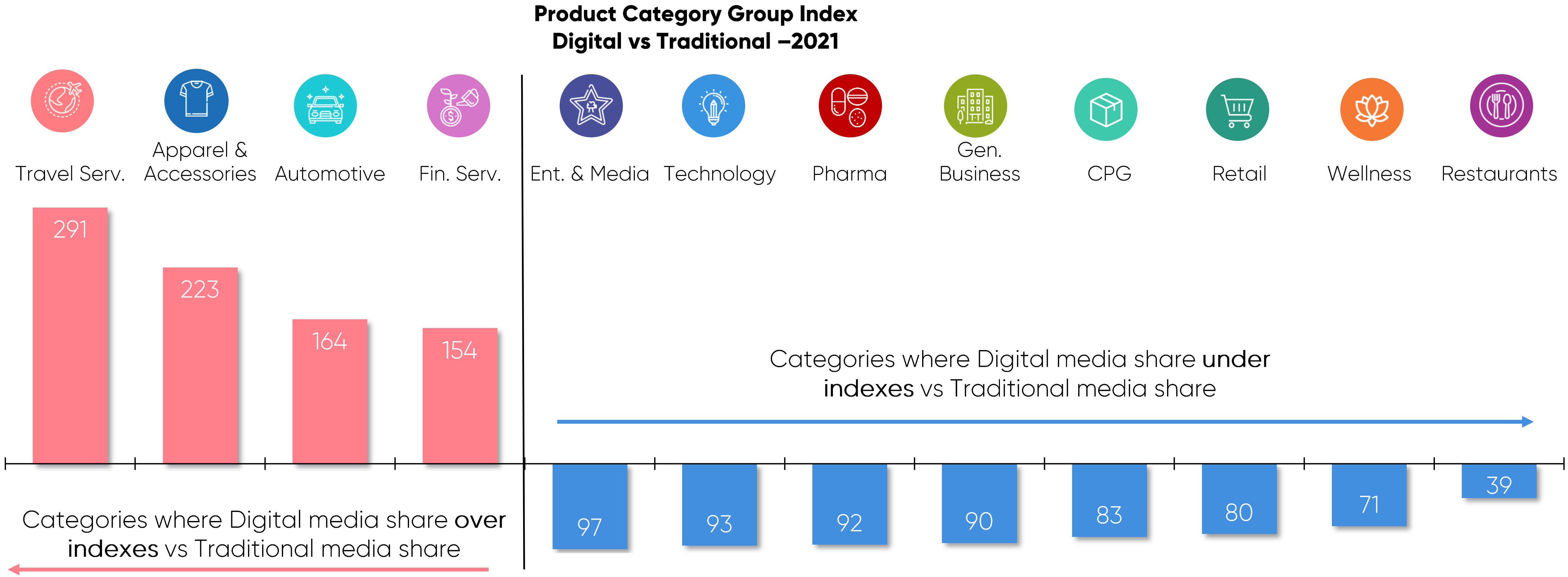


AUTOMOTIVE, ENTERTAINMENT & MEDIA, GENERAL BUSINESS, PHARMA, AND TRAVEL ARE THE CATEGORIES THAT DID NOT MEET 2019 LEVELS WITHIN THE LINEAR TV SPACE

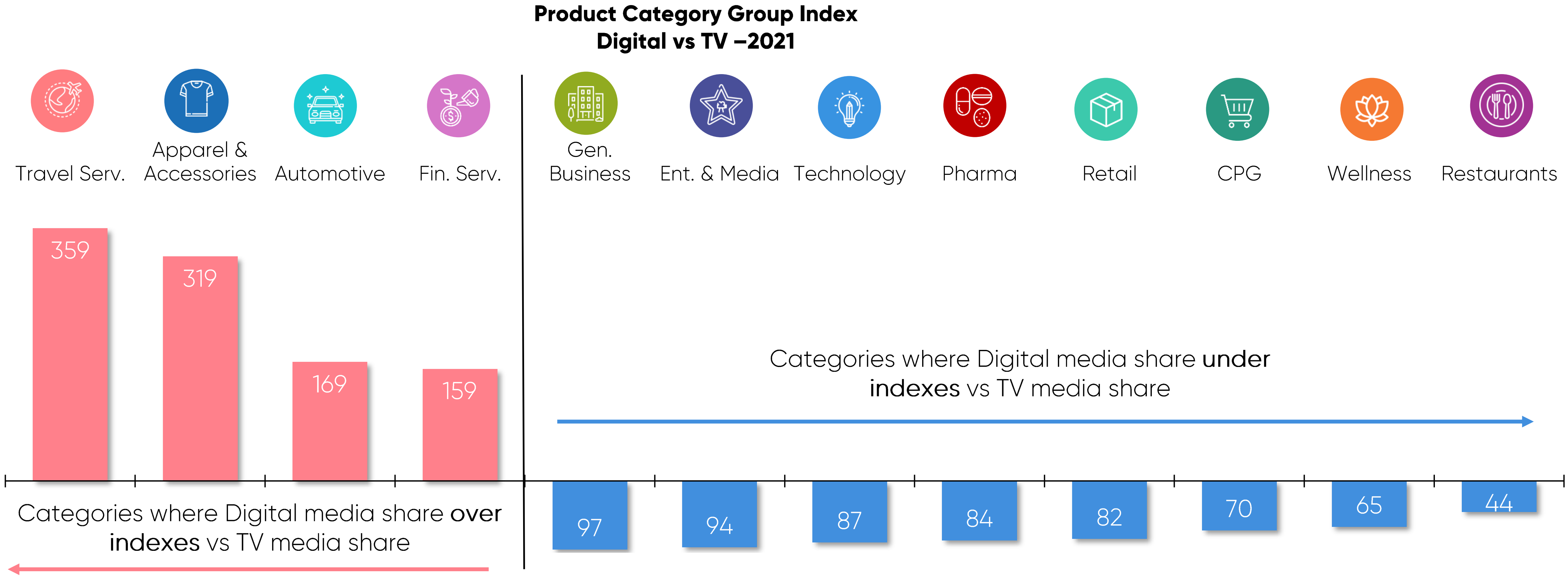
Product Category Groups
Television National Brand Ad Spend – Percent Change
2021 vs 2020 & 2019



WHO LEANED MORE HEAVILY ON WHICH MEDIA TYPES IN 2021



WHICH CATEGORIES ARE LEANING INTO TV WITHIN THEIR MEDIA MIX



Source: SMI Pool | Markets Include Canada
Media Formats Include: TV and Digital
SMI Client Report | Cannot be Distributed Without SMI's Consent

Not Showing Product Category Group 'SMI Pool'

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ALMOST ALL CATEGORIES ARE SPENDING MORE ON DIGITAL AND TV THAN THEY DID LAST YEAR

SOME CALL OUTS ARE ACCESSORIES WITHIN THE DIGITAL SPACE, NON-ALCOHOLIC BEVERAGES WITHIN RADIO AND PRINT, TOYS & GAMES WITHIN OOH, AND CREDIT CARDS ON TV

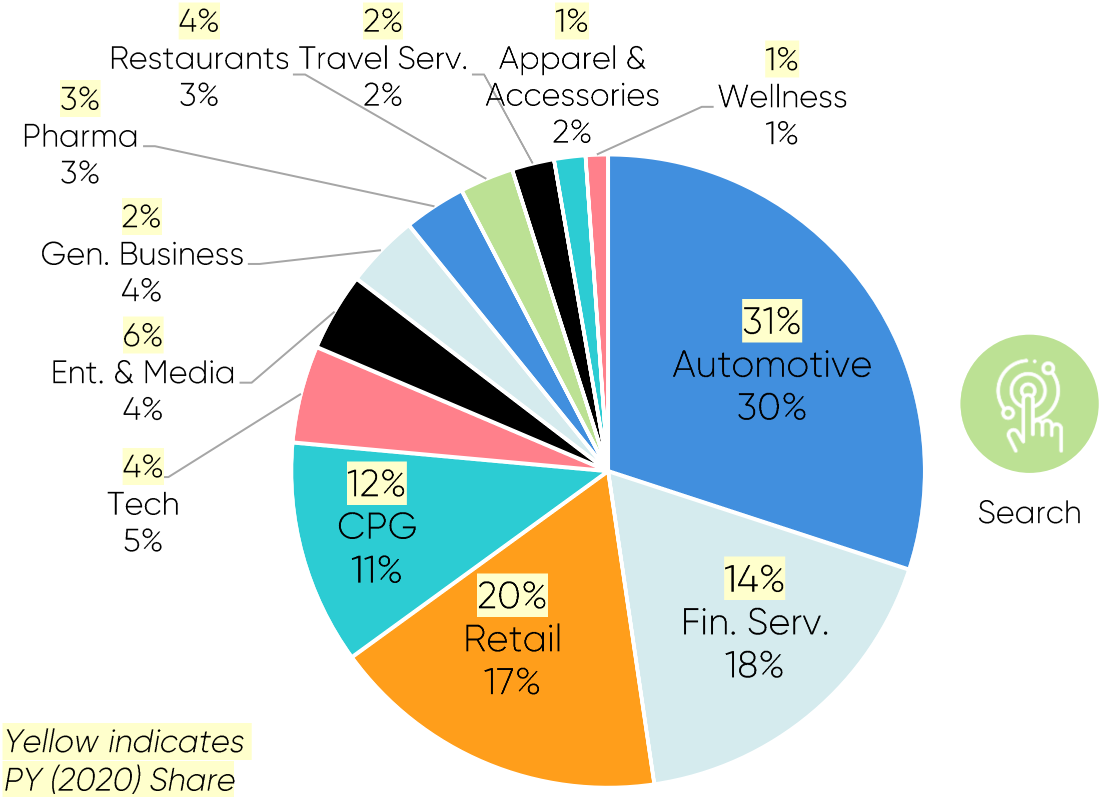
	2021 Index to PY				
	Digital	TV	Radio	OOH	Print
Apparel & Accessories	195	164	127	136	159
Accessories	227	187	NA	100	170
Apparel & Footwear	183	149	126	168	119
Automotive	125	118	86	96	59
Automotive Aftermarket Parts & Services	154	132	110	239	73
Automotive Vehicles & Dealerships	123	117	84	94	58
CPG	125	120	104	99	87
Alcoholic Beverages	173	166	120	105	98
Food	117	111	54	77	92
Household Supplies	132	123	0	121	81
Non-Alcoholic Beverages	158	119	189	113	202
Personal Care	105	118	109	91	74
Entertainment & Media	143	129	95	135	71
Entertainment	144	136	143	162	127
Media	141	96	58	102	68
Toys & Games	139	108	7	1,729	42
Financial Services	141	137	95	90	48
Banking and Investments	140	125	95	92	53
Credit Cards	179	267	20	71	13
Insurance	119	141	102	98	38

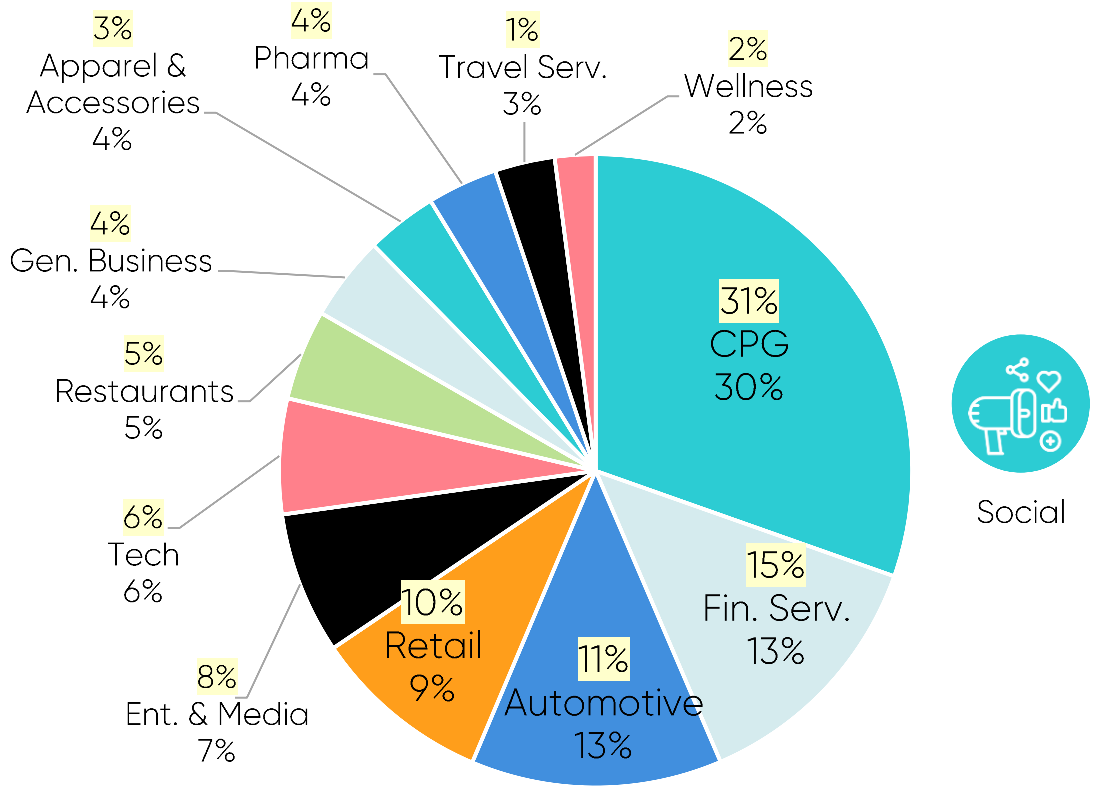
THE CALL OUTS HERE ARE PRESCRIPTION DRUGS AND ONLINE RETAILERS WITHIN THE RADIO SPACE, WELLNESS IN THE OOH SPACE, AND TRAVEL UPPING SPEND ON DIGITAL, RADIO, AND PRINT

	2021 Index to PY				
	Digital	TV	Radio	OOH	Print
General Business	173	144	76	111	84
General Products	165	117	80	95	93
General Services	188	210	71	147	60
Pharmaceuticals	124	100	154	86	92
OTC Medicines & Remedies	105	85	39	7	39
Prescription Drugs	162	189	308	147	106
Restaurants	139	111	99	121	25
Quick Serve Restaurants	139	111	99	121	25
Retail	118	131	84	115	123
Department Stores	131	0	0	14	39
Online Retailers	279	221	363	299	17
Other Stores	97	120	94	88	184
Specialty Retailers	125	123	31	103	126
Technology	121	145	169	109	202
Consumer Electronics	110	115	116	82	94
Technology	165	170	192	127	204
Travel Services	248	111	200	44	240
Travel Services	248	111	200	44	240
Wellness	138	151	168	235	53
Health & Fitness	93	182	195	248	52
Medical Equipment & Facilities	215	114	144	217	53

DIGITAL GROWTH DRIVEN BY SEARCH AND SOCIAL SEES THE SAME TOP FOUR CATEGORY GROUPS, BUT THEY HOLD VASTLY DIFFERENT SHARE

Product Category Group
2021 Investment Share
Search & Social

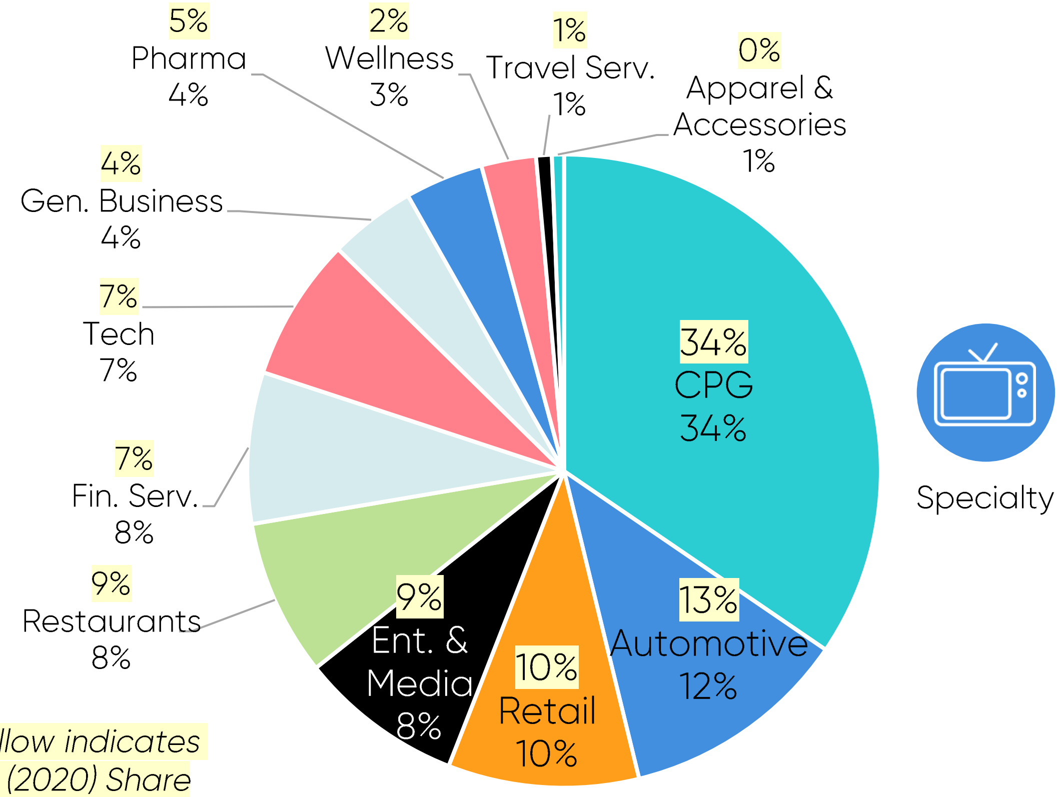


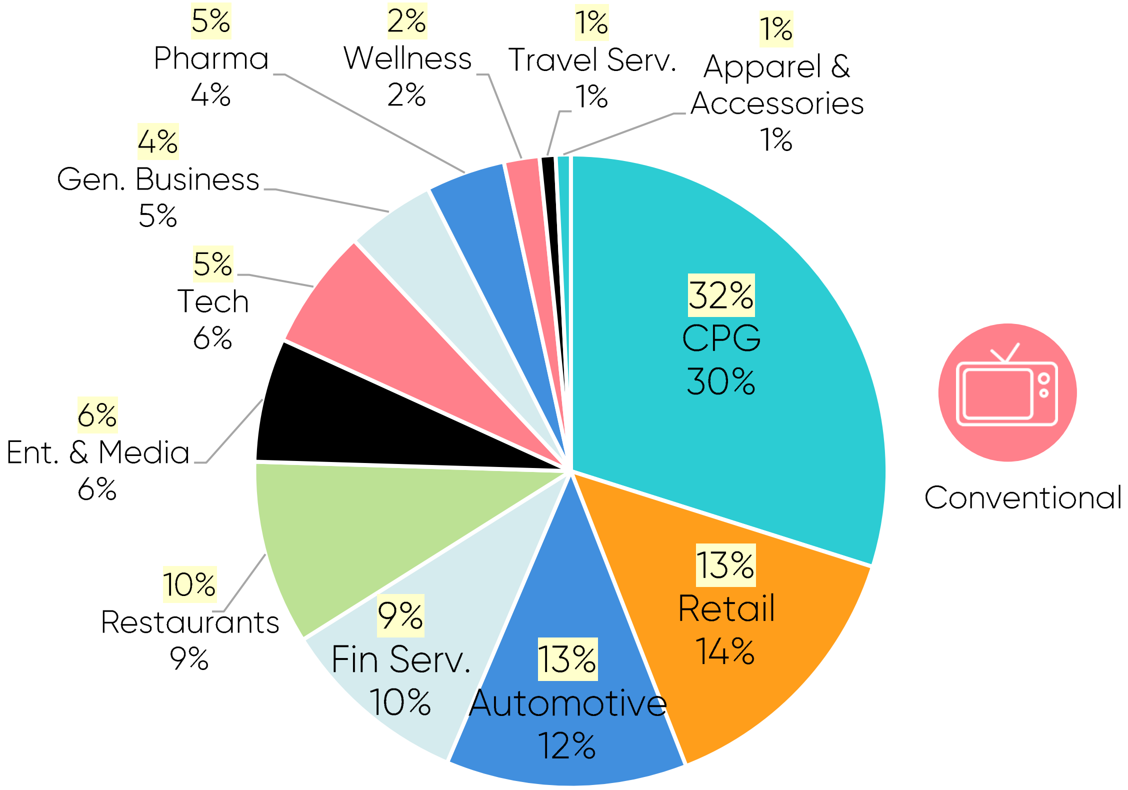


Yellow indicates PY (2020) Share

ENTERTAINMENT & MEDIA USING SPECIALTY, FINANCIAL SERVICES USING CONVENTIONAL

Product Category Group 2021 Investment Share Specialty & Conventional





Yellow indicates PY (2020) Share

Source: SMI Pool | Markets Include Canada
Media Formats Include: Specialty and Conventional (TV)
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Left pie % is Share of Specialty Investment
Right pie % is Share of Conventional Investment
Not Showing Product Category Group 'SMI Pool'

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KEY TAKEAWAYS

ALL CATEGORY GROUPS FINISHED UP VS 2020, AND ONLY AUTO, ENT. & MEDIA, GEN. BUSINESS, AND TRAVEL WERE UNABLE TO MEET 2019 LEVELS

WITHIN DIGITAL, ALL CATEGORY GROUPS WERE IN A GROWTH POSITION VS 2020 AND PRE-PANDEMIC 2019, WITH THE EXCEPTION OF TRAVEL WHICH IS STILL DOWN VS 2019

CATEGORY GROUP SHARE DIFFERENCES BY MEDIA TYPES PRESENT OPPORTUNITIES TO SHIFT DOLLARS

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Darrick Li

Managing Director, Canada

darrick@standardmediaindex.com

Kelly Fedoruk

Senior Manager, Client Solutions

kelly@standardmediaindex.com

120 Adelaide Street West, Suite 2500

Toronto, Ontario M5H 1T1

1-647-388-2882

info@standardmediaindex.com

standardmediaindex.com

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Coverage is 94% of agency market in Canada

Source:

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