



The Canadian Media Landscape



PHD
PHD

OUTTHINK.
OUTPACE.
OUTGROW.

PHD
PHD

PWD

Everything is
the same

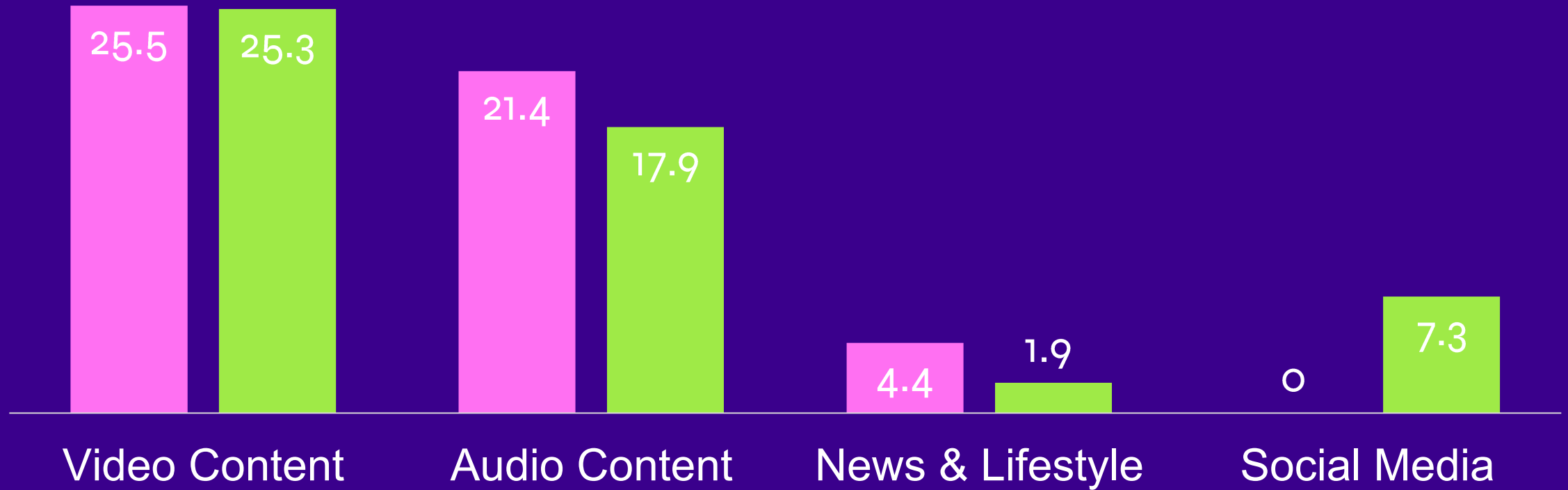
Everything has
changed

It's about to
change again

PDW

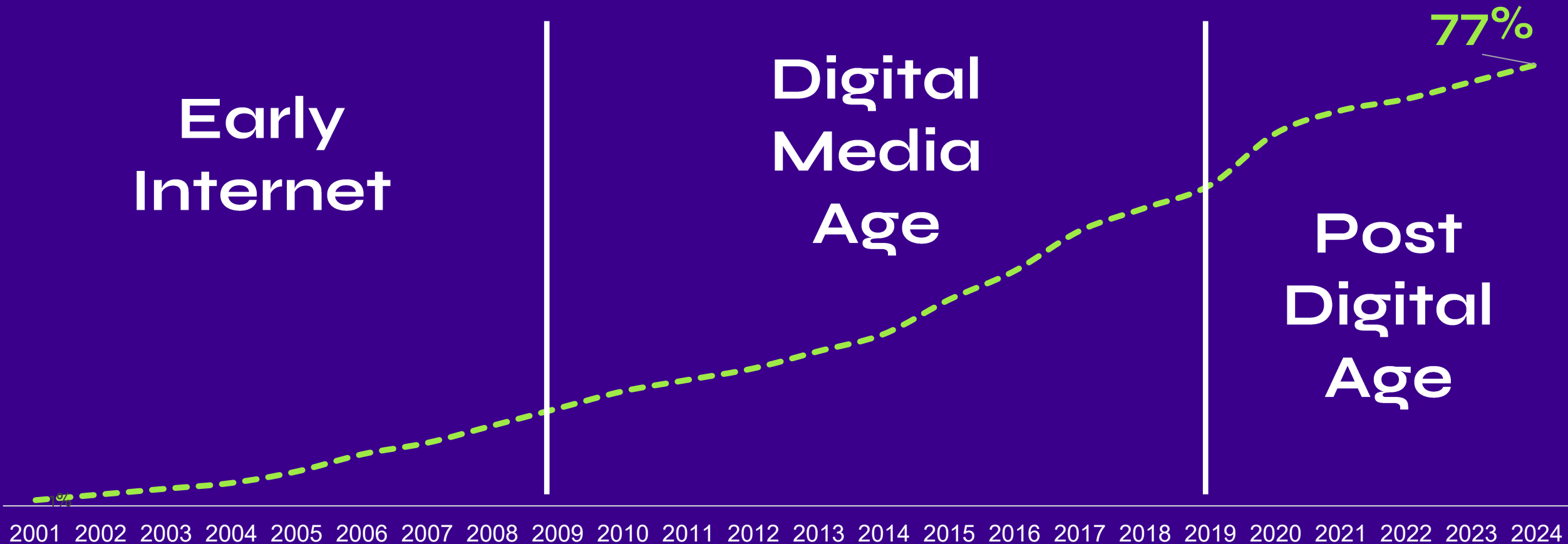
Media Consumption 2002 vs 2025

(per capita weekly hours)



Digital Advertising Share of Revenue

(Total Industry)



Digital Media Age

Digital used by Young & Early Adopters

TV & radio were the only mass media

Content access was limited



Post Digital Media Age

Common Use Across Generations

Social media has comparable scale

Broad content distribution

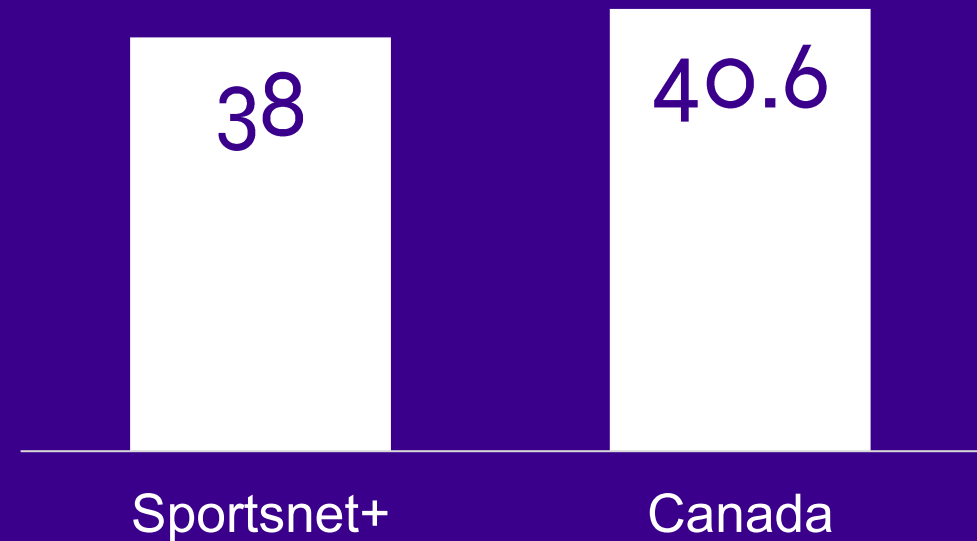
The Blue Jays World Series illustrates access & adoption

Content Availability

>10%

of the audience
was streaming

Common Use Across Generations



Categorizing Channels based on Focus

Watching & Listening

TV
CTV
Other Video
Radio
Podcast
Audio Streaming
Cinema

Reading & Engaging

Social Media
News – Digital
Lifestyle – Digital
Newspaper
Magazine
OOH

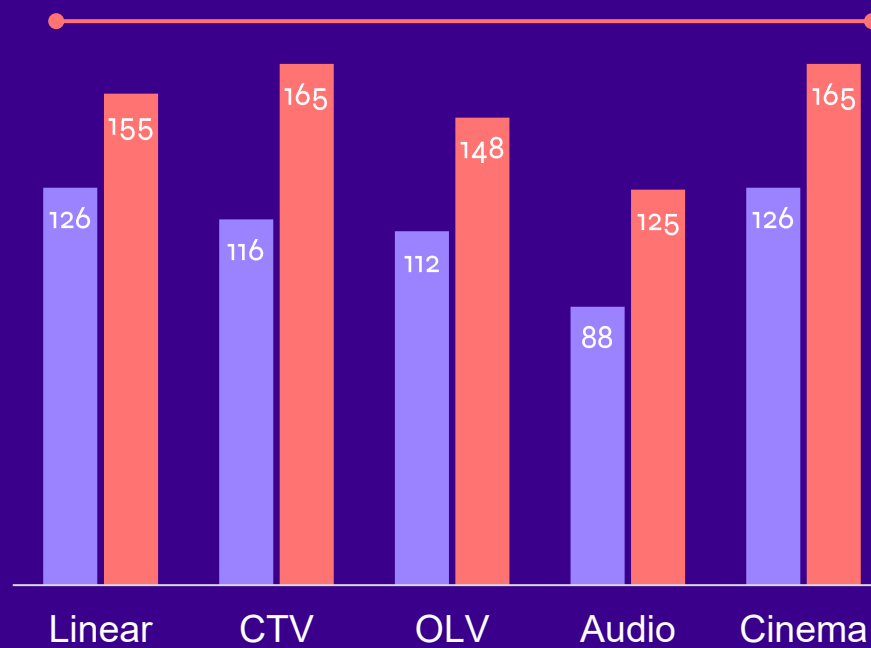
Searching & Finding

Search
Retail – Digital
AI

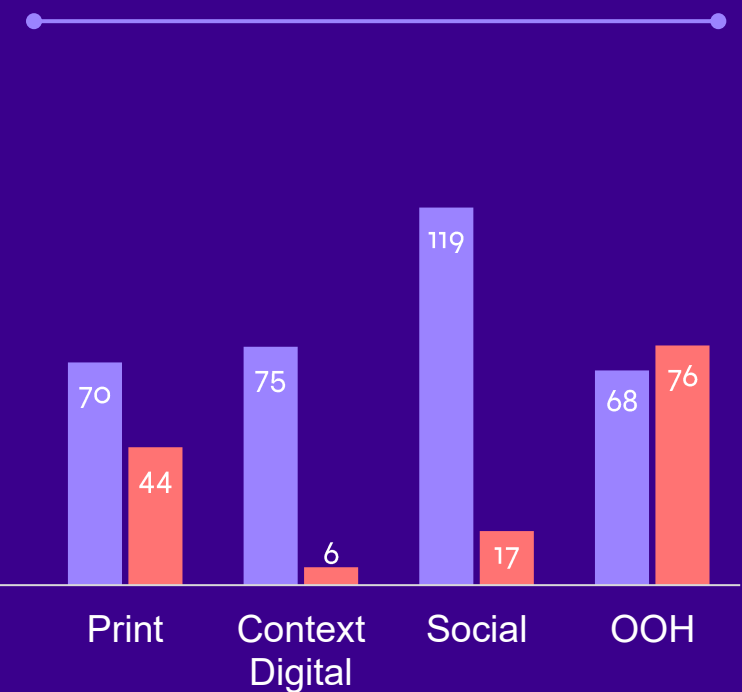
Ad Attention Index

- Brief
- Extended

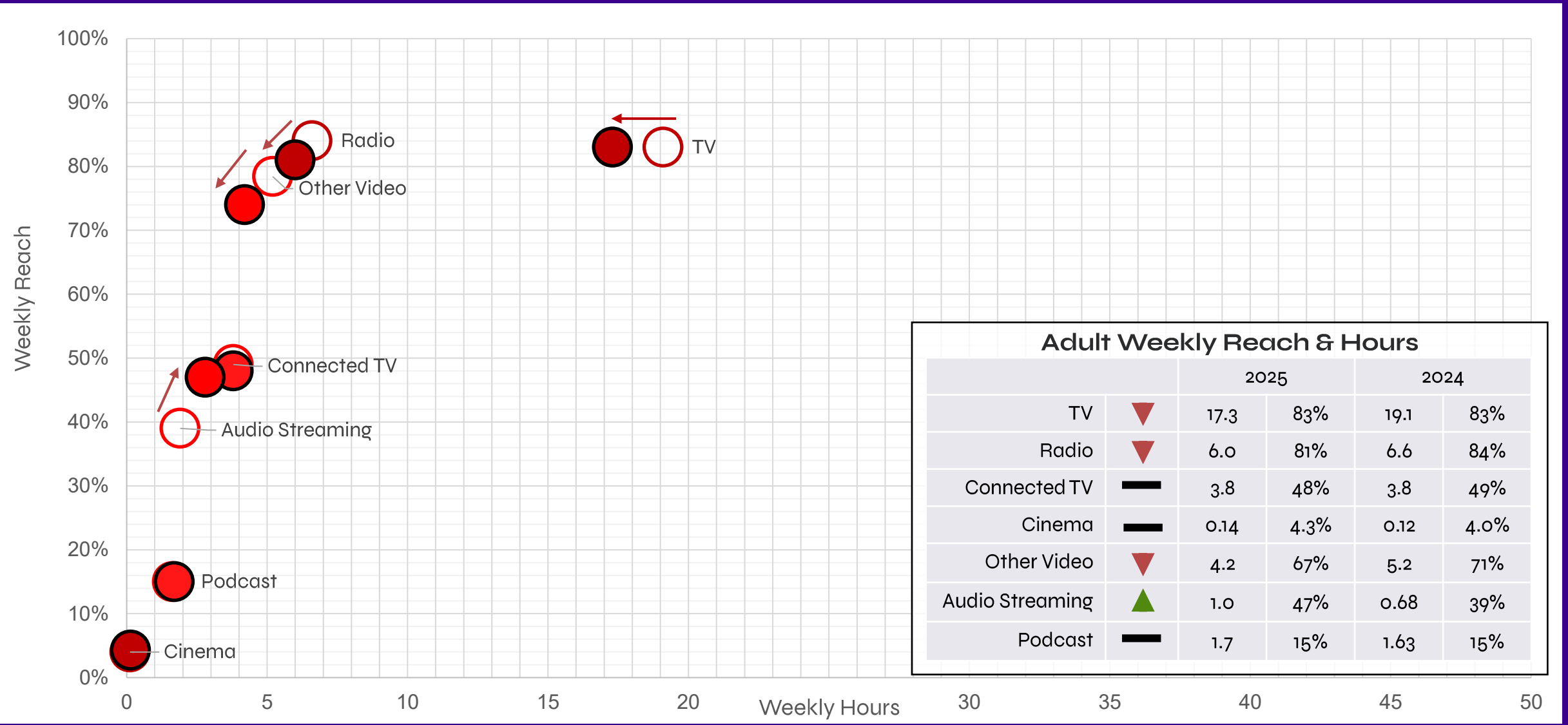
Watching & Listening



Reading & Engaging

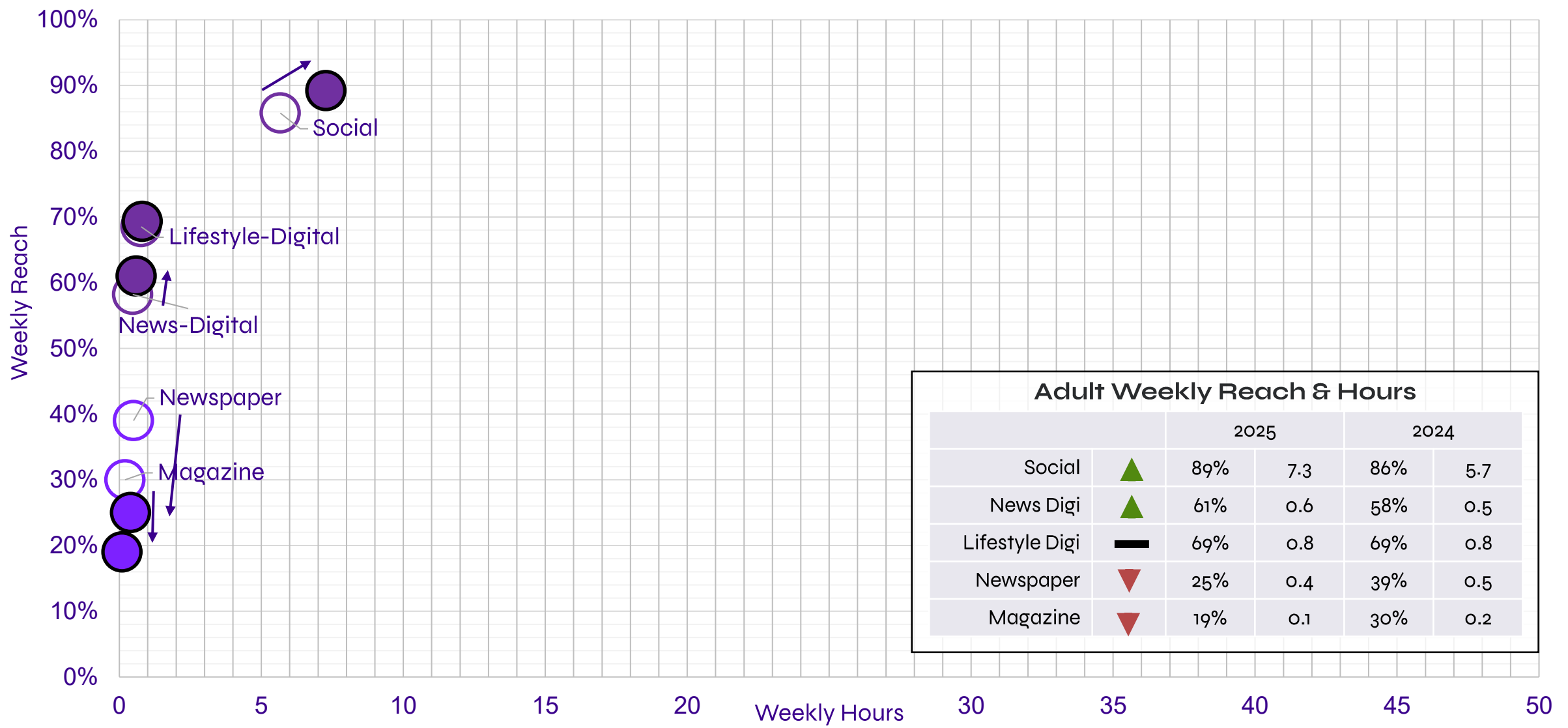


Watching & Listening Channel Reach & Time



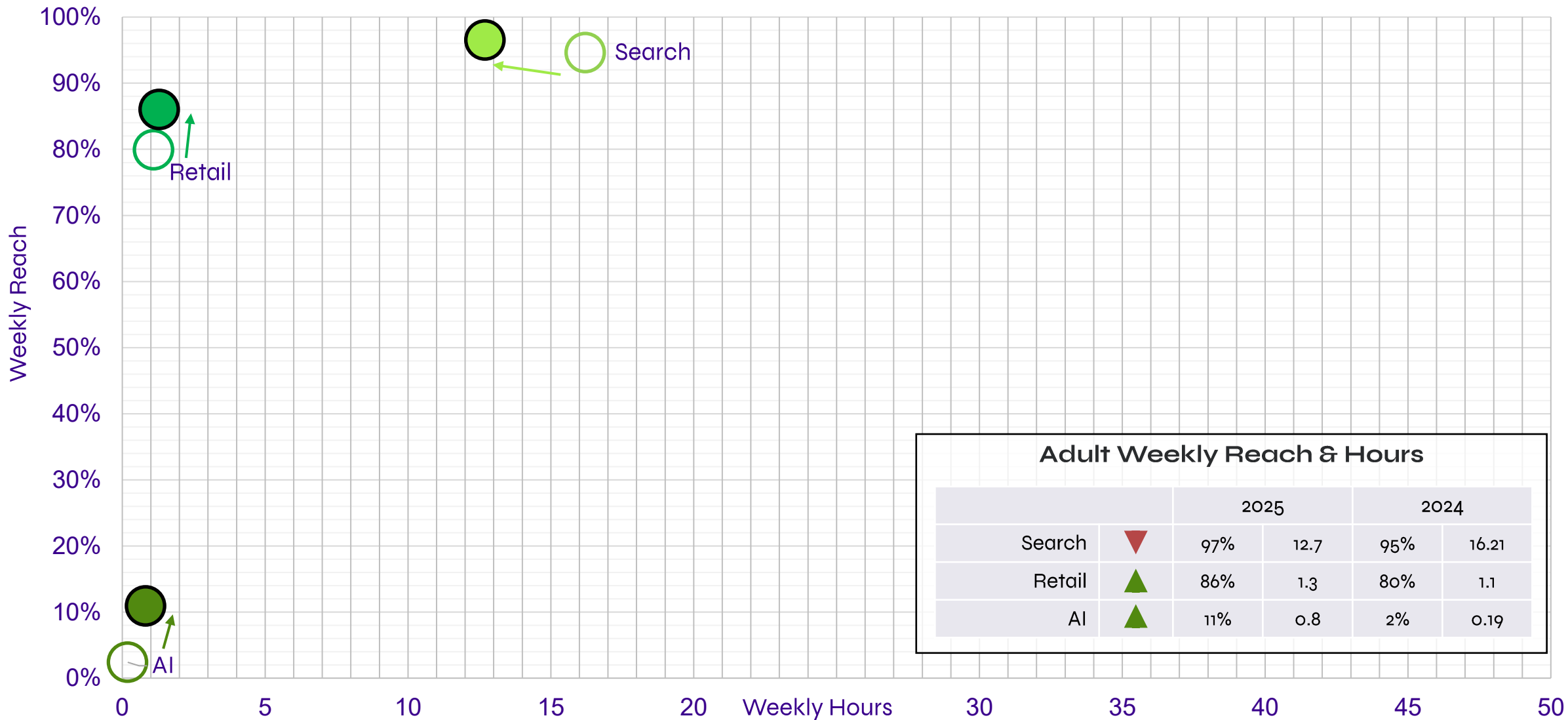
Sources: TV & Radio from Numeris PPM, Print from Vividata, Digital from Vividata and PHD Estimates

Reading & Engaging Channel Reach & Time



Sources: TV & Radio from Numeris PPM, Print from Vividata, Digital from Vividata and PHD Estimates

Searching & Finding Channel Reach & Time



PWOC

The Age of Abundance

DWd

By 2030
25%

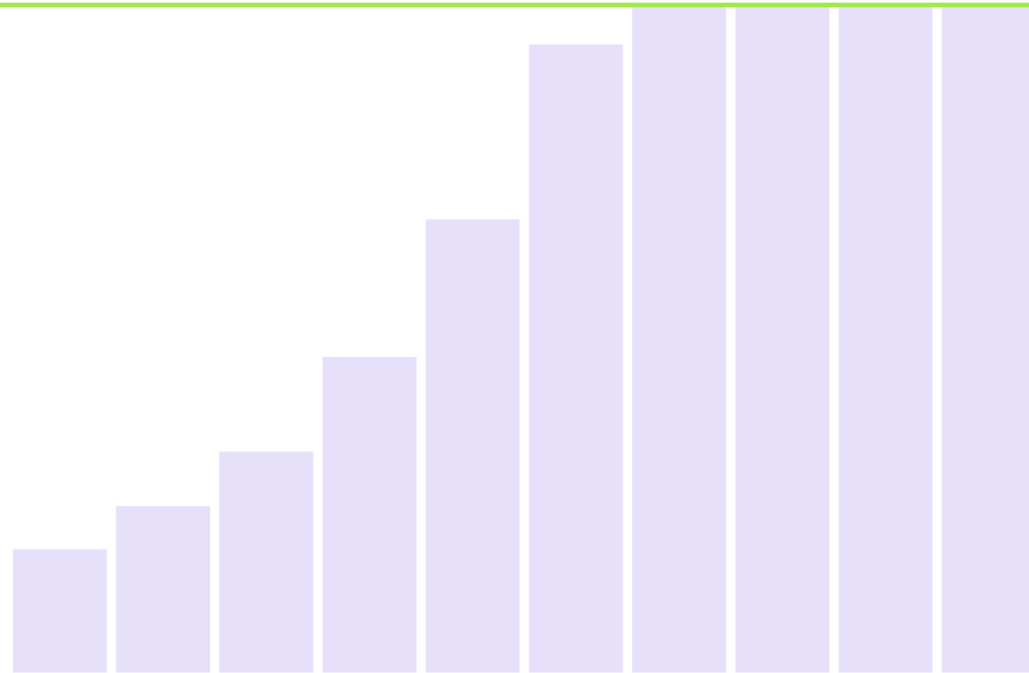
(c.\$15trn)

of all consumer transactions
will be delegated to machines.

100

ROLE OF BRAND INDEX %

0



Automated by Agents

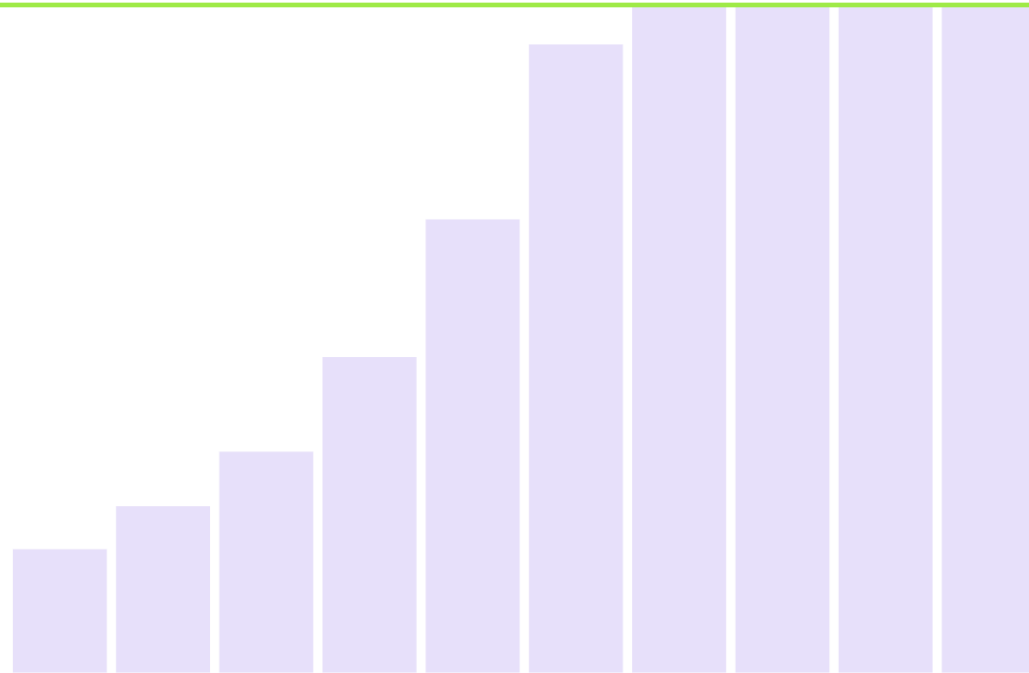
Low involvement

Price & functional benefit

100

ROLE OF BRAND INDEX %

0



The line of indifference

Automated by Agents

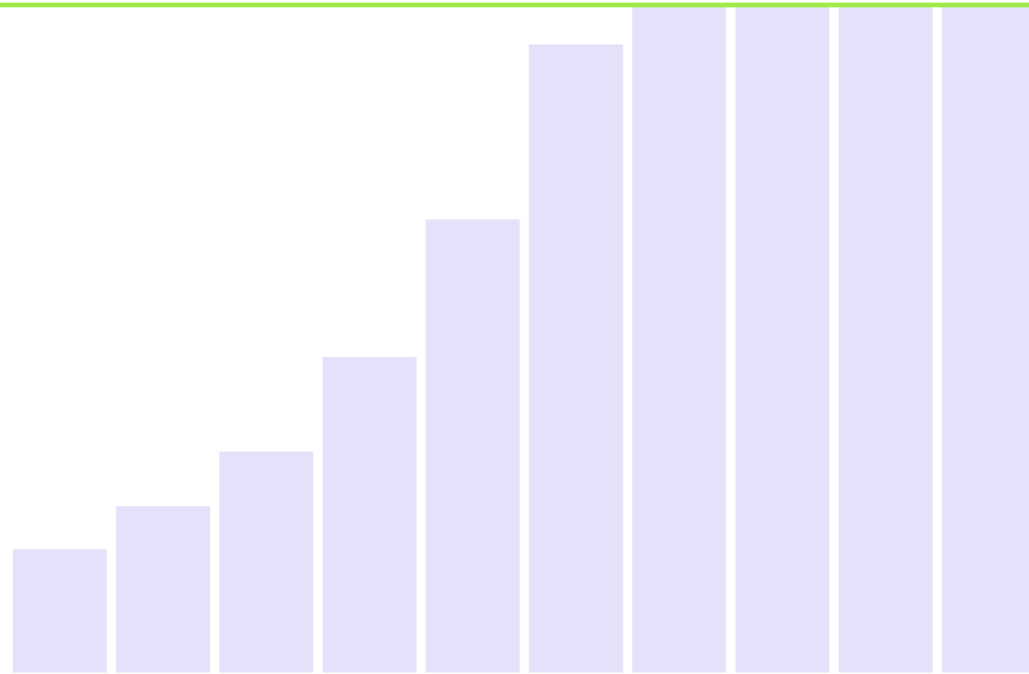
Low enjoyment

Price & functional benefit

100

ROLE OF BRAND INDEX %

0



Chosen by People

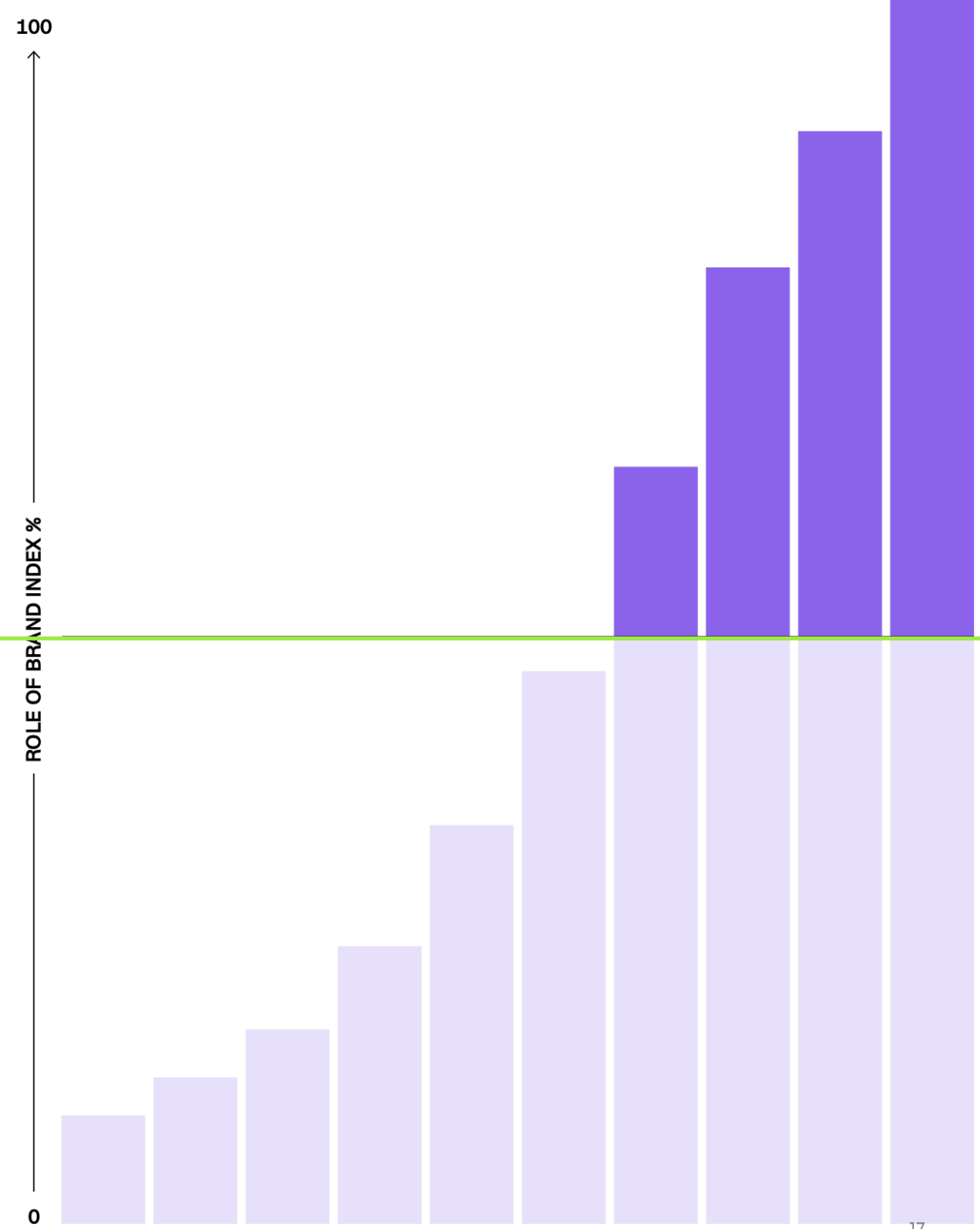
High enjoyment

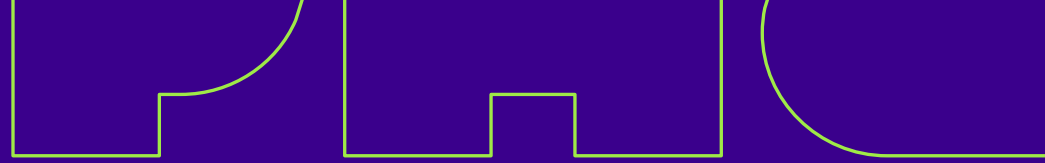
Emotion and meaning

Automated by Agents

Low enjoyment

Price & functional benefit



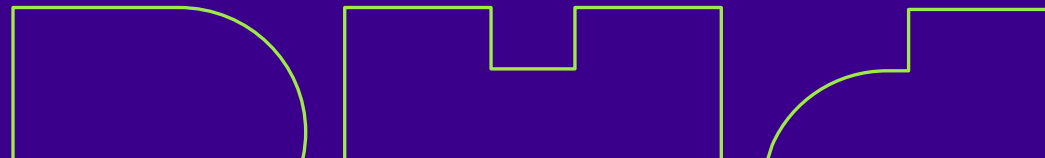


Winning in the Age of Abundance

Know your market

Know how ads
drive profit

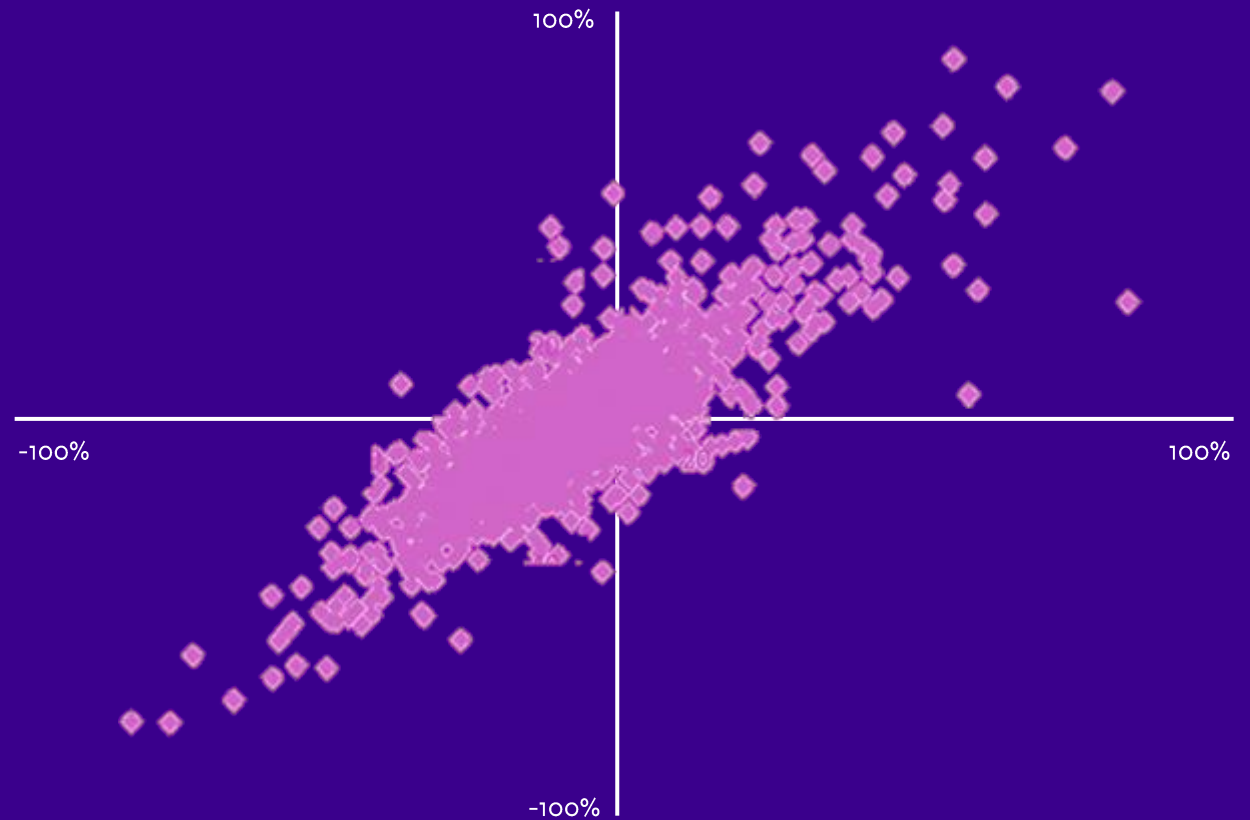
Know the potential
of AI



Know your market because brand growth will continue to be tied to winning & retaining customers

% change in number of buyers

% change in sales quantity



Weekly Reach & Time by Age Cohort

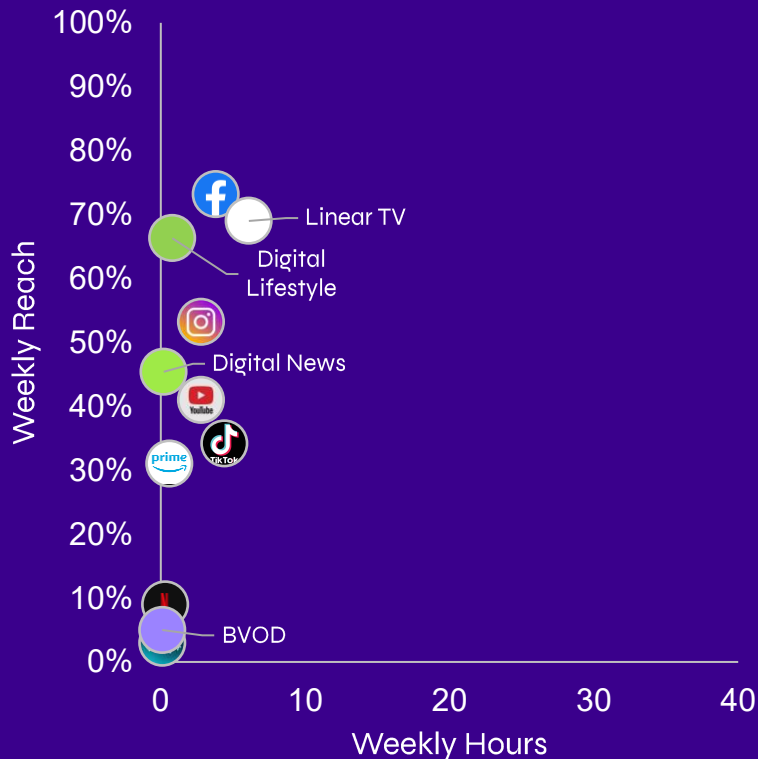
The Youngest

20%

Disposable Income

<10%

Wealth



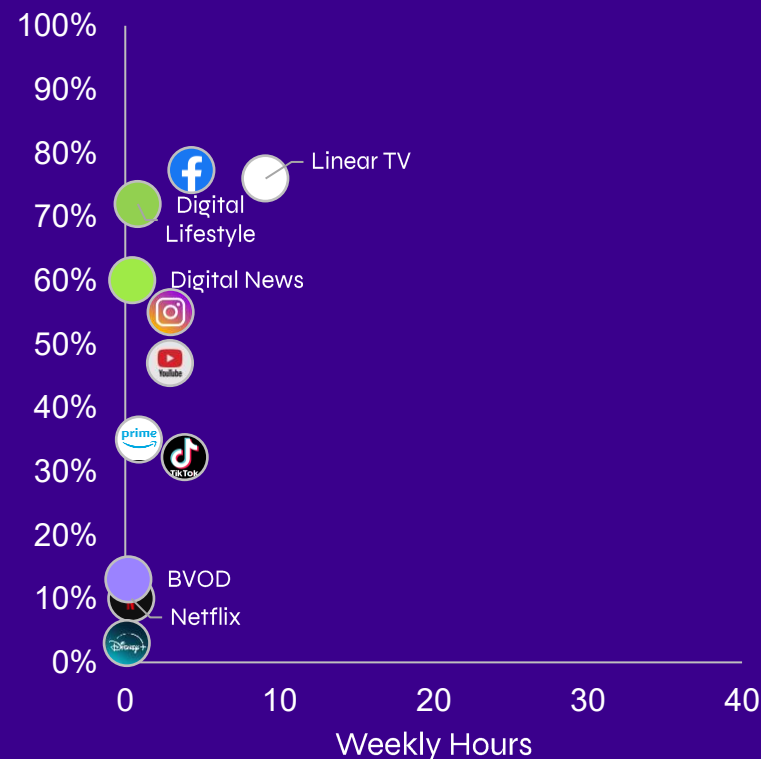
The Middle

44%

Disposable Income

35%

Wealth



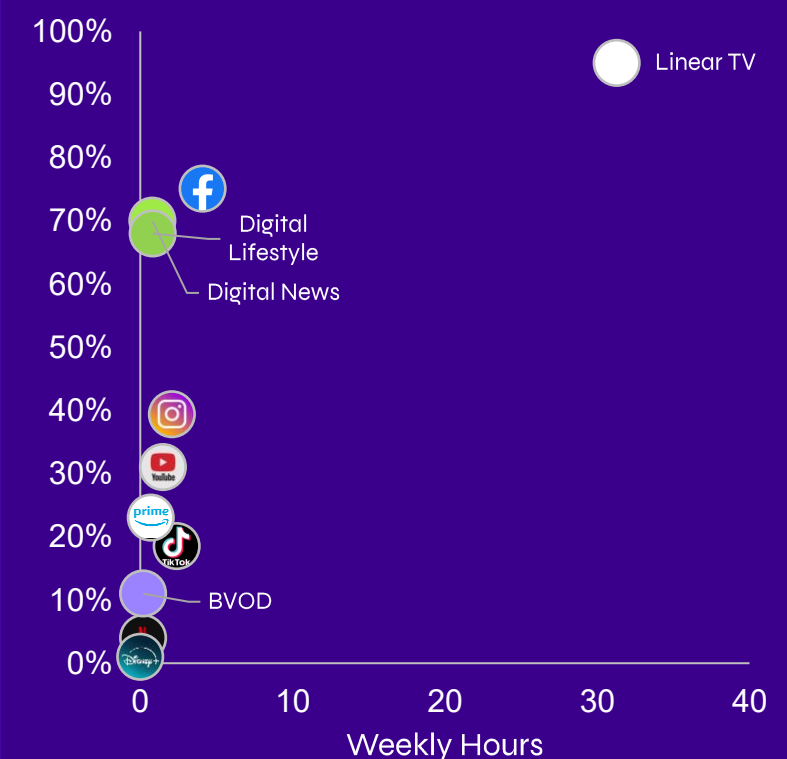
The Oldest

36%

Disposable Income

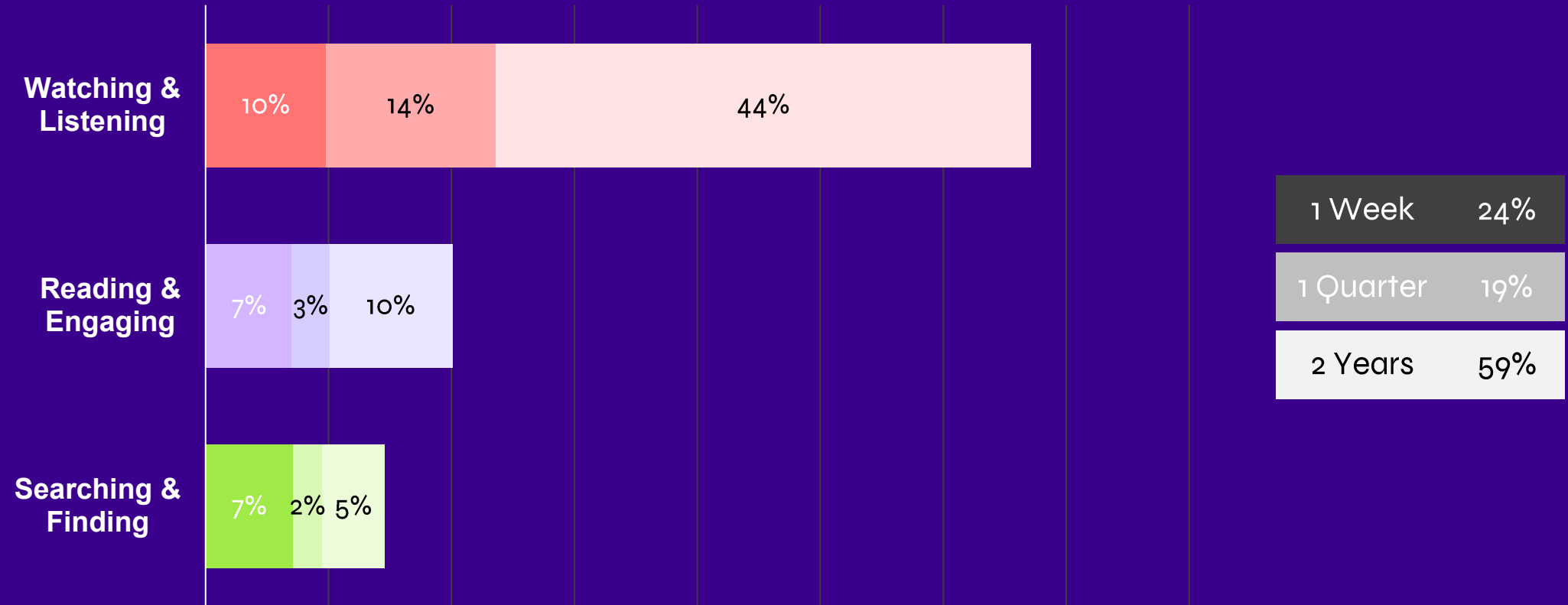
55%

Wealth

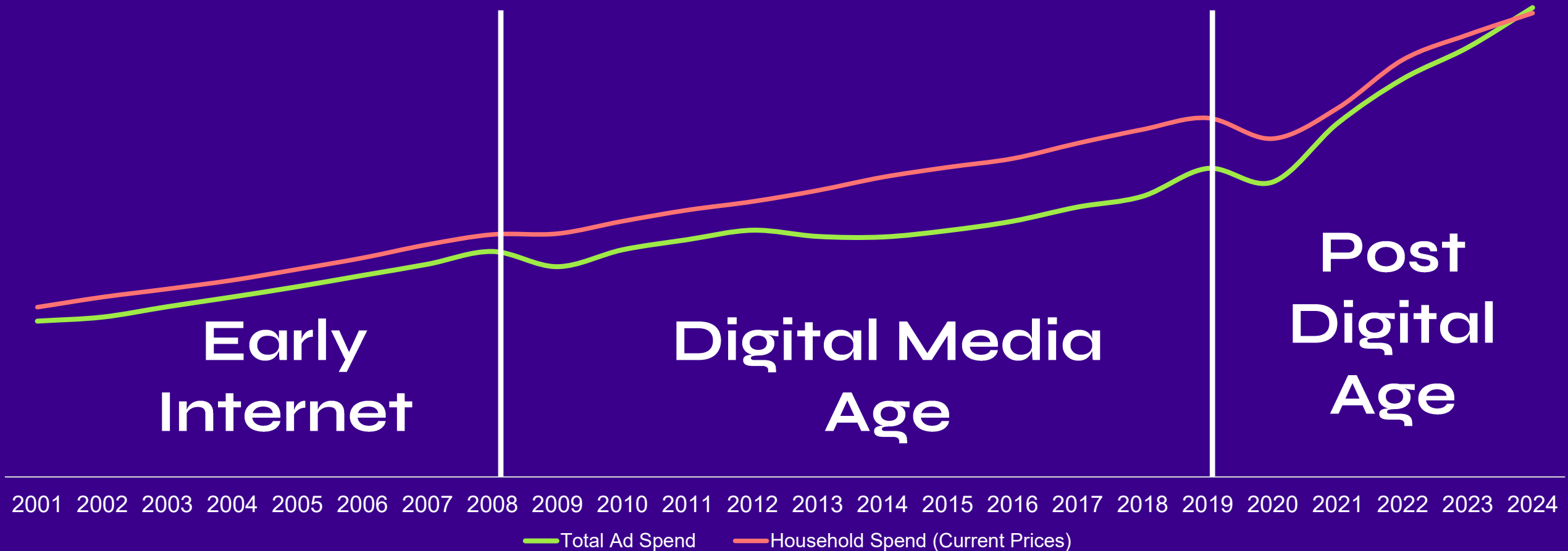


Know how ads drive profit

% of full profit generated by advertising
(UK Data)



The market's belief in ads has accelerated



Know the potential of AI

– to disrupt the current advertising model

$>1/2$

of media time is spent
with algorithmically
responsive
content

$>2/3$

of advertising is
transacted
algorithmically.

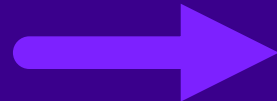
$<1/2$

of advertising profit
contribution (according
to the UK research)

Know the potential of AI

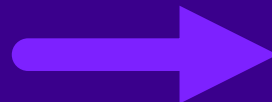
- to increase the value of insight & emotion

Understanding people
by what they read,
write, and click



Understanding how
people feel, sense, notice,
and absorb

Media bought & sold as
audience reach & action



Media bought & sold as
access to human states

Culture as an audience
driver



Culture as an operating
system of growth

AI has transformed how **information** moves

It is starting to reshape how **meaning** moves too

Advantage belongs to brands that **act early**