



## Developments in Cross-Platform Audience Measurement in Canada

Neil McEneaney  
President & CEO



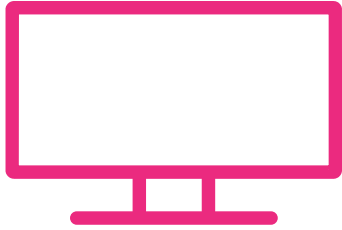
**NUMERIS**

The background features a gradient from light pink to purple, overlaid with several thick, wavy, semi-transparent lines in shades of pink and purple. The text is positioned on the left side of the image.

**What's New in Canada?**

## TV & Radio reach remains strong

**118 Million Hours**  
spent with TV yesterday



every week TV reaches

**93%**

Person 2+

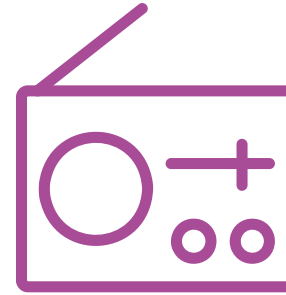
**92%**

Adults  
(25-54)

**88%**

Millennials  
(A18-34)

**8.1 Million Hours**  
spent with Radio daily in the Fall



every week Radio reaches

**86%**

Person 12+

**89%**

Adults  
(25-54)

**80%**

Millennials  
(A18-34)

## But.... consumption is changing

TV and Radio reach remains significant, but Behaviour is changing year over year:



Linear TV is declining

-4%

2+

-5%

25-54



Radio Streaming is increasing

53%

18-34

(4.04% → 6.19%)

2/3rd

Canadians listening to audio via the internet



Increased OTT

2%

13%

of homes don't have cable & growing

# Demographics are changing

Growing

**30-39**  
adults

**50+**  
adults

**<10**  
children

Declining or  
steady

**20-29**  
adults

**40-49**  
adults

**12-17**  
teenagers

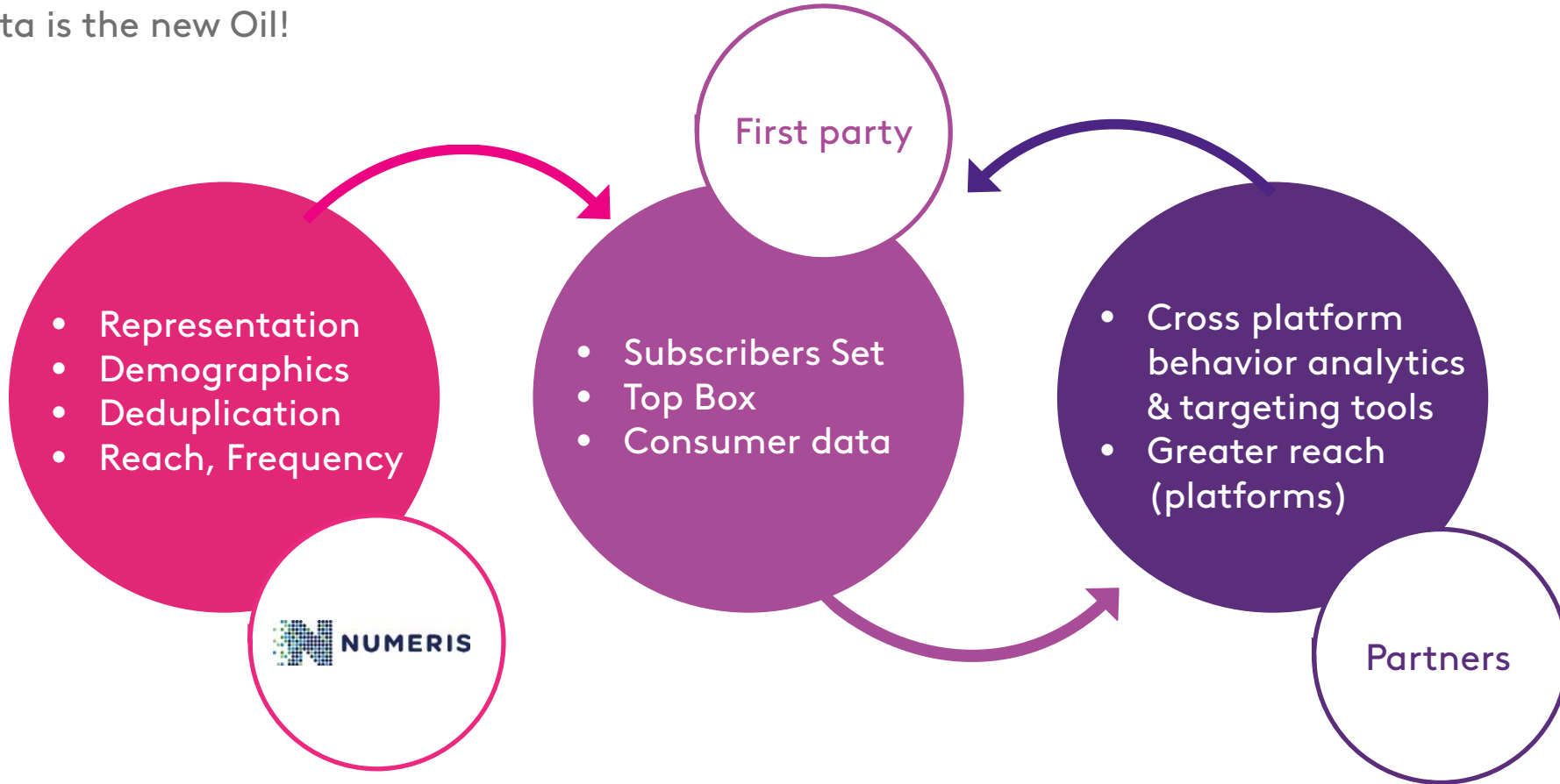


Cultural diversity through  
immigration

Tuning/viewing of homeland  
and/or mainstream programs

# Growing need to leverage data

Data is the new Oil!



# The Regulatory Environment is changing

## Focus:

Should Canada have a standard measurement system that includes STB?

## Goal:

Levels the playing field with access to STB data for all players, more granular measurement, better planning for programming and targeting sales & negotiations of content

## Status:

Proof of Concept Fall 2018



# The Regulatory Environment is changing

## CRTC Review: Future of Audio & Video



### Focus:

- Future Programming models
- How will Canadians access content and through whom
- New business models supporting the creation, production & distribution of Canadian programming?

### Goal:

- CRTC to update (overhaul) Canadian Broadcasting Regulation

### Status:

- CRTC Report June 2018



The background features a dark purple gradient with several thick, wavy lines in shades of purple and blue. One prominent line curves from the top right towards the bottom right, while another crosses it from the top left towards the bottom right. A third line curves from the bottom left towards the bottom right.

**Numeris' New Vision Managing Change**

# New Vision: Setting up a new foundation

Where Numeris is today

## Information

- Linear focused with limited digital capture
- Panel measurement built on Linear references
- Digital capture is incidental

## Consumer Landscape



# A new measurement foundation

Understanding consumers & behaviors



# A new measurement foundation

A greater focus on driving more value

Members' leveraging Numeris data

Capture holistic video landscape (audio to follow)

Scale & granularity

Reduce gap re value – advertiser/broadcaster

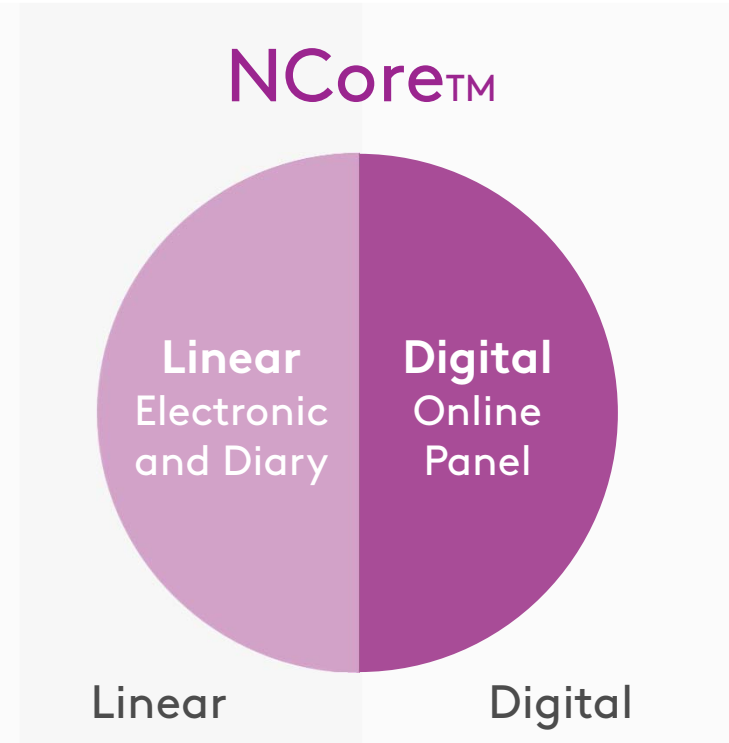


# Cross-Platform Audience Measurement

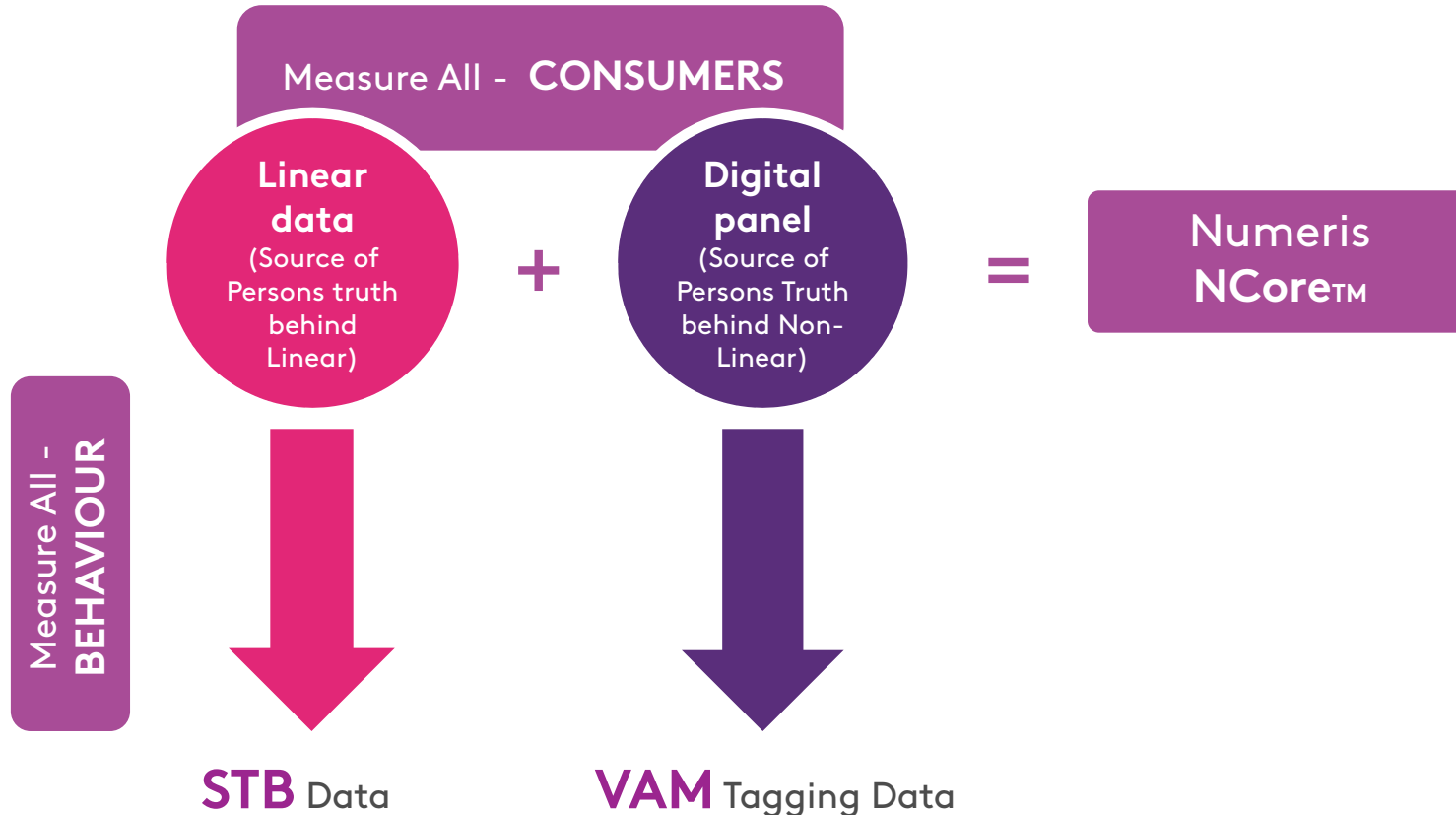
# The start of cross-platform audience measurement

New Consumer Landscape - NCore™

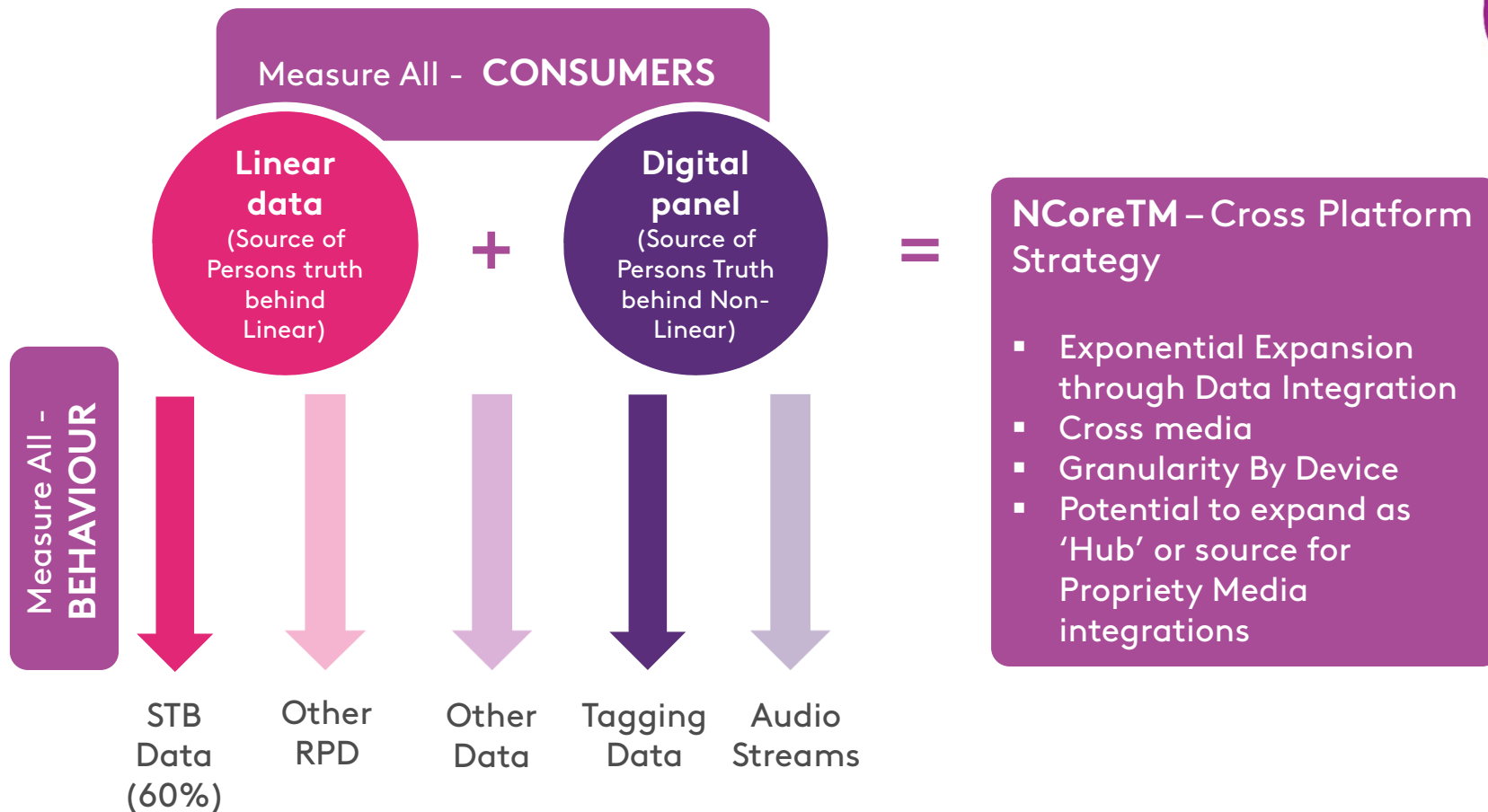
- NCore is the foundation on which all data can provide context and convert into Knowledge.  
For this to be possible, it MUST reflect the whole landscape.
- DATA alone is not knowledge. A contextual balanced living source for consumer information is necessary.



# Active today



Next: grow all





# The path forward with our Partners

VAM

Partners:

KANTAR MEDIA

COMSCORE.

Proof of Concept –  
May 2018

Gated  
Implementation –  
Fall 2018



Partners:

KANTAR MEDIA

STB

Proof of Concept –  
Fall 2018

Report to CRTC –  
Jan 2019



# VAM – A game-changer

## Anticipated Benefits & Managing Expectations

- Universal need to embark on digital video measurement to understand audiences
- A way to bridge the media line divided for broadcaster sales teams, and for Agency and Advertiser planning and buying tools
- For advertisers and agencies, understanding the value of their marketing investment in digital and linear is paramount.
- For broadcasters, the ability to strategically invest and monetize investments in content by platform is a priority.
- Address the incompatibility of data
- Trusted, transparent, independent 3<sup>rd</sup> party validation
- 1<sup>st</sup> step in changing the business models
- Opportunity to partner with digital players
- Implement as soon as possible

# STB – Promising...but early days

## Managing Expectations

- High degree of interest with Members, not just the Government
- Vertically integrated members have been working with STB for years and part of their data strategies
- National STB system in demand as no single cable/satellite company has sufficient distribution/geography to represent the entire market
- Members' expectations are to monetize increased audiences and leveraging their data in creating consumer segments
- CRTC insisted that the cable/satellite companies participate on the STB project as part of their license renewal process

# Future opportunities

Moving to ubiquity

## Exclusive

- Independent
- Non-Partisan
- Incumbent currency

## NCore™

- New Measurement Foundation – Cross Platform
- Understanding consumers & behaviors
- Leverage 1<sup>st</sup> party data
- Partnership
- Expanded Membership

## Ubiquity

- Ubiquitous connectivity
- Pervasive
- Scale
- Predictive
- Multiple data sets
- Multiple metrics

Adapting to consumer behavior & digital growth

Thank You!

**#**km**summit**