

Measurement Innovation in Canada

CIMM CROSS-PLATFORM MEDIA
MEASUREMENT & DATA SUMMIT

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NUMERIS



This is Canada

- Population: 35.2 million
- Two official languages English and French
- 6 time zones
- 2 out of 3 Canadians live within 100 kms of the US Border



70% of the Population Live in Urban Areas



Canadian Audiences

34.4 Million

Canadians watch
TV each week

27.4 Million

Canadians listen to
the Radio each week



Source: Numeris; TV- Total Canada, Wks 3-16, 2015; Radio Diary – Total Canada, Fall 2015

We Watch the Same Programs – A25-54

#1 Big Bang Theory

#2 Survivor: Millennials vs Generation X

#3 Grey's Anatomy

#4 Designated Survivor

#5 Lucifer



Source: Numeris, Fall TV, weeks 3-16, 2016, Total Canada, A25-54, AMA (000), 3+ airings

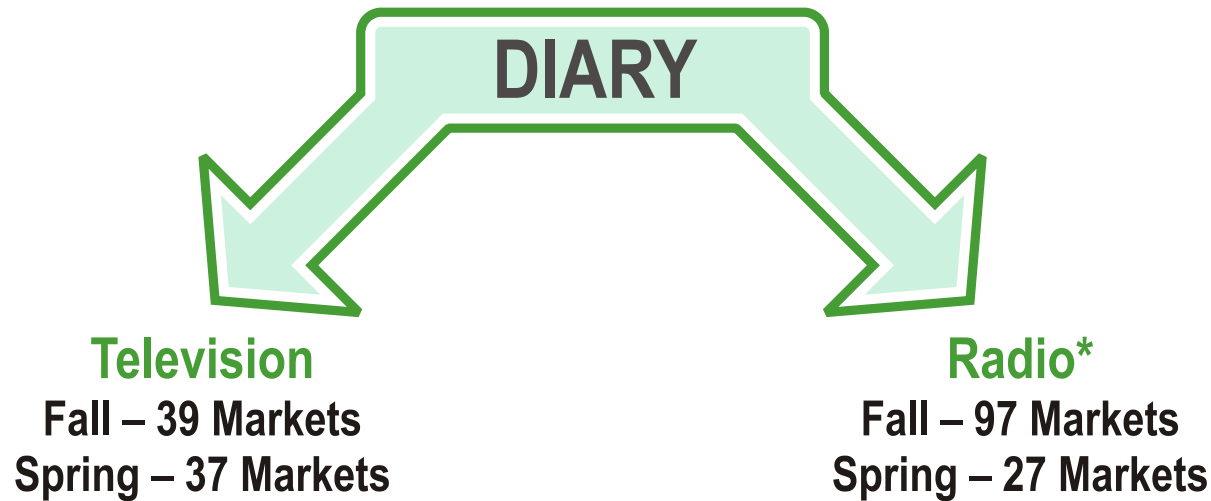
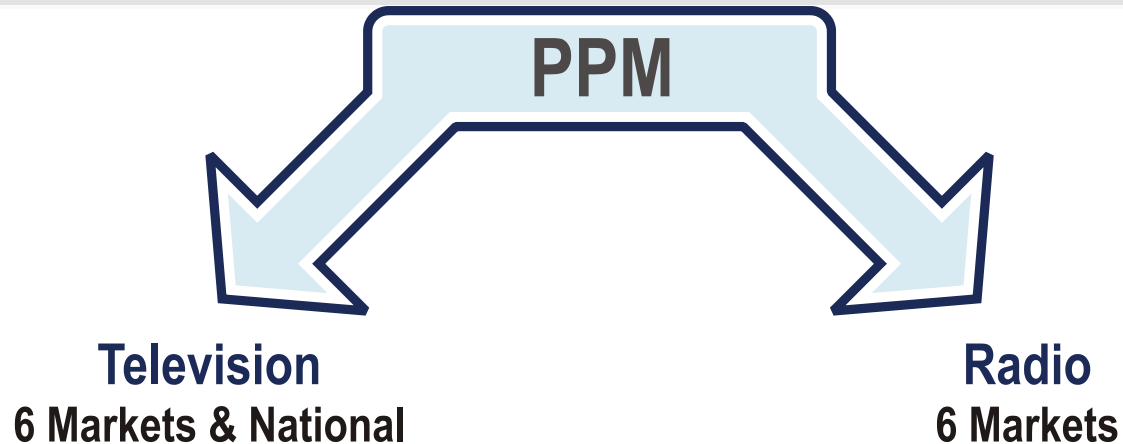
We both have new leaders...



Numeris: The Industry's Rating Service

- **Tripartite Not for Profit Co-Operative**
- **1,250+ members, 150+ licensees**
- **250 FT / 500PT+ employees**
- **Canada's source for audio and video measurement**
- **One of top 10 largest market research firms in Canada**
- **Radio measurement began in 1944 and TV service started in 1952**
- **Partner with Nielsen (PPM technology) and Kantar (processing)**

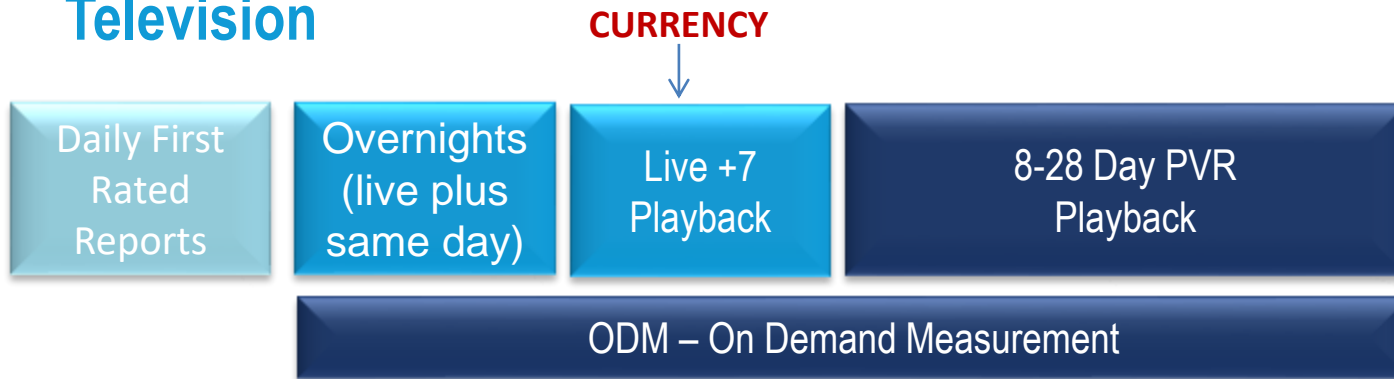
Television and Radio Measurement



*Online Diary launched Fall 2016

PPM Audience Measurement

Television



Radio



Single Panel: Many Capabilities

- Live radio and television encoded stations
- Consumer recorded TV playback (up to 28 days)
- Online radio and television streaming for encoded stations (radio being tested with platform ID)
- Mobile streaming for encoded stations — all devices including Blackberry, Apple, Android
- In Home and Out of Home viewing captured
- Video on Demand – encoded VOD episode content
- Cross Media – TV and Radio combined database

We Measure People

- **11,000+ Canadians in our National/Market panels**
 - (4500+ households)



Methodological Approach: PPM Panel

- **Sample frame: Telephone frame (LL+MOH)**
- **Recruitment: All HHs able to consume media**
- **Monthly Establishment Survey**
 - Source of UEs for media technologies (e.g., tracking use, penetration rates)
 - Pool of HHs for panel recruitment
 - Use for calibration by other media firms
- **Demographic variables based on Statistics Canada**
- **Panel fully controlled and managed by Numeris**
 - Balancing at HH level (stratification)
 - Weighting at Individual level (post-stratification)

NUMERIS INSIGHTS

Single Source - On Demand Viewing

On-Demand Viewing Summary



Dramas had the highest OD AMA



OD AMA 5%-10% of linear AMA



25%-40% OD viewers also viewed same program in linear feed



74%-78% OD viewers watch at least one of episodes as another household member



Most viewers watched **1-3 episodes** of the same program through OD



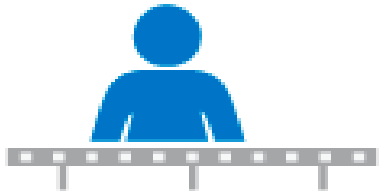
April & May had highest Spring OD viewing

Day of the week for OD viewing vary by genre



On-Demand Viewing Summary

Large majority of episodes viewed



within 8 days of being posted.



Most episodes viewed close to their entirety



- female
- 25-49 years old
- part of workforce
- medium or heavy TV viewer



OD viewers more likely to live in a household with:

- children < 12
- more than one TV set
- PVR
- high-speed internet

- **OD reach ~3%-10%**
- **commercials/promotions: no negative impact** on audience retention
- daily shows not usually watched through OD

NUMERIS

New – Data Integration Projects

Video Audience Measurement

- **Strategy:**
 - Initial focus on video and original digital video from TV broadcasters not currently encoded
- **Approach:**
 - Membership based committee to assess needs and select a digital partner.
- **Status:**
 - RFP issued, Finalists selected, Evaluation underway



STB/RPD Measurement

Let's Talk TV Decision

The CRTC (Canada's broadcast regulator) is requiring the industry to form a working group to develop an audience measurement system based on the data from set-top boxes. This group will be tasked with proposing technical standards, privacy protections and a governance structure, as well as determining how costs will be shared.

Working Group is comprised of broadcasters, cable and IP operators, and producers

Set Top Box/RPD Measurement

- **Strategy:**
 - Use STB/RPD data from BDU's across the country to build a harmonized viewing dataset that can be integrated with Numeris panel data
- **Approach:**
 - Numeris selected to work with Working Group to design, test, and develop a RPD based dataset
- **Status:**
 - Phase One technical test complete. Phase 2 underway.



Thank You

