Measurement Innovation in Canada

CIMM CROSS-PLATFORM MEDIA MEASUREMENT & DATA SUMMIT

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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

- We have 500 radio stations (but >1,800 reportable)
- 70% of the population live in urban areas
- Increased urbanization
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

PPM

Television
6 Markets & National

Radio
6 Markets

DIARY

Television
Fall – 39 Markets
Spring – 37 Markets

Radio*
Fall – 97 Markets
Spring – 27 Markets

*Online Diary launched Fall 2016
PPM Audience Measurement

Television

- Daily First Rated Reports
- Overnights (live plus same day)
- Live +7 Playback
- 8-28 Day PVR Playback

ODM – On Demand Measurement

Radio

- Daily Radio Reports
- Confirmed Weekly Respondent
- Monthly Respondent Release
- Quarterly Release (13 weeks of data)

CURRENCY
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)
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
- April & May had highest Spring OD viewing
- **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
- Day of the week for OD viewing vary by genre

Audiences count. 14
On-Demand Viewing Summary

Large majority of episodes viewed within 8 days of being posted.

Most episodes viewed close to their entirety.

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

Large majority of 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
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
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.