

The Kantar logo, featuring the word "KANTAR" in a bold, white, sans-serif font. The letter "K" is stylized with a vertical yellow bar on its left side. The background of the slide is a dark, atmospheric photograph of a city skyline at sunset or sunrise, with a bridge in the foreground and a large circular graphic overlay on the right side.

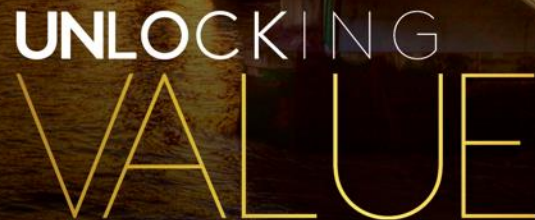
KANTAR

The Canadian Journey

Building Value with Video Measurement

Neil McEaney, President & CEO | Numeris

Kristin Wozniak, SVP, Analytics, Insights & Strategy | Cossette Media

The text "UNLOCKING VALUE" is displayed in a large, white, sans-serif font. The word "UNLOCKING" is in all caps and smaller font size, while "VALUE" is in all caps and a much larger font size. The letters are spaced out across the width of the slide. The background is the same city skyline at sunset/sunrise as the left side of the slide, with a bridge in the foreground and a large circular graphic overlay on the right side.

UNLOCKING
VALUE

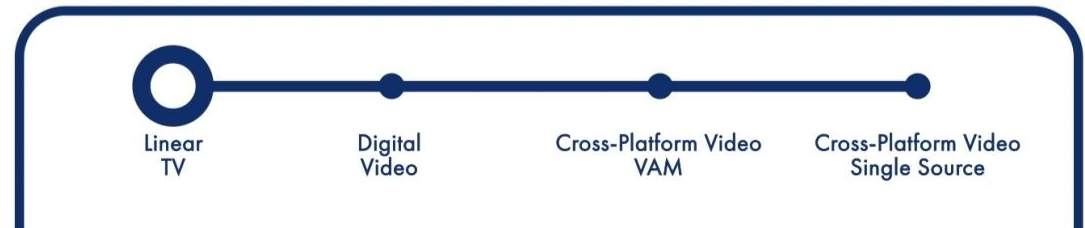
The World Audiences Summit **2022**



The Journey to Complete Video Measurement

Linear TV

Linear TV Consumer Behaviour



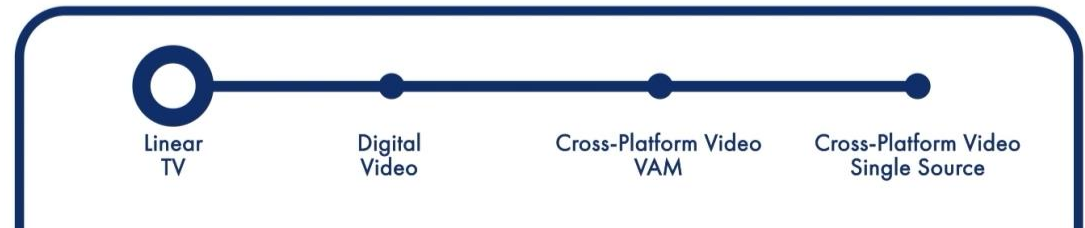
Linear TV

Digital Video

Cross-Platform Video VAM

Cross-Platform Video Single Source

TV Panel Canada



TV Consumption



Digital Video

Digital Video Consumer Behaviour



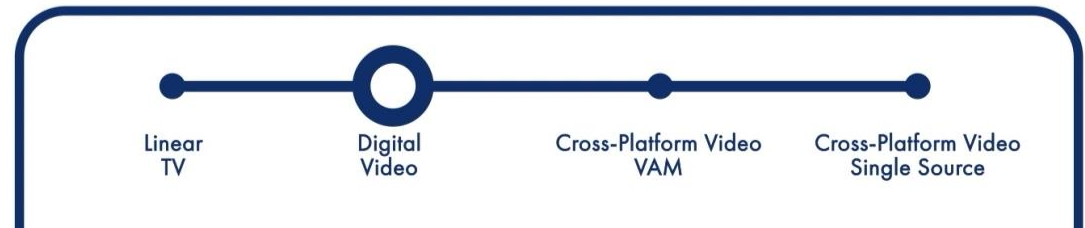
Linear
TV

Digital
Video

Cross-Platform Video
VAM

Cross-Platform Video
Single Source

Online Panel Ontario and Quebec



Online Panel Ontario and Quebec



Panel Informed
by Census
Digital Data

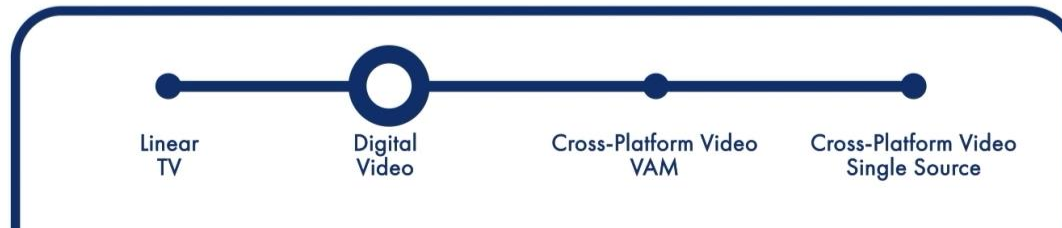
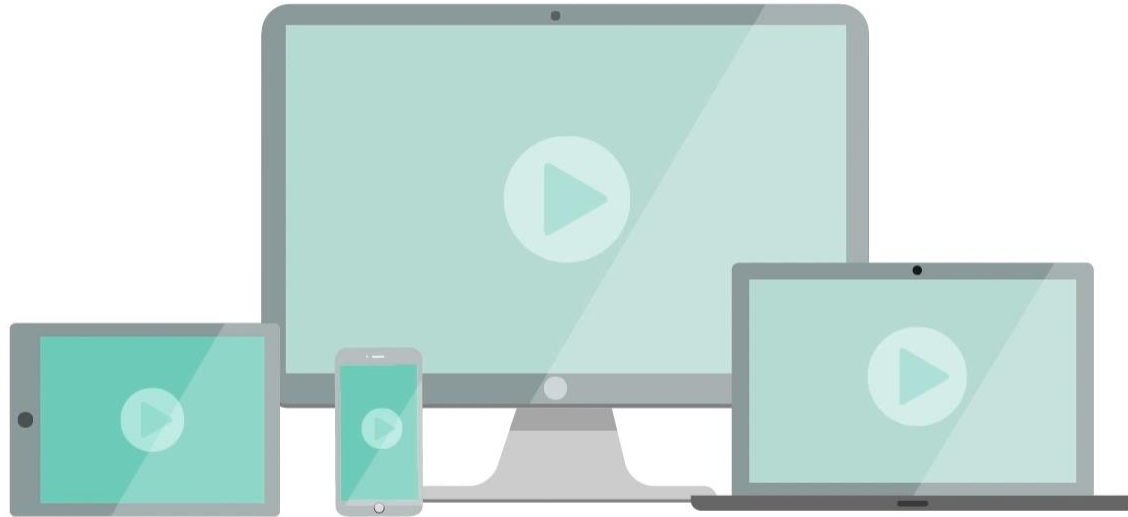
Linear
TV

Digital
Video

Cross-Platform Video
VAM

Cross-Platform Video
Single Source

Digital Video Consumption



Cross-Platform Video Measurement VAM

Video Consumer Behaviour

Fused Panels



Video Consumer Behaviour Fused Panels



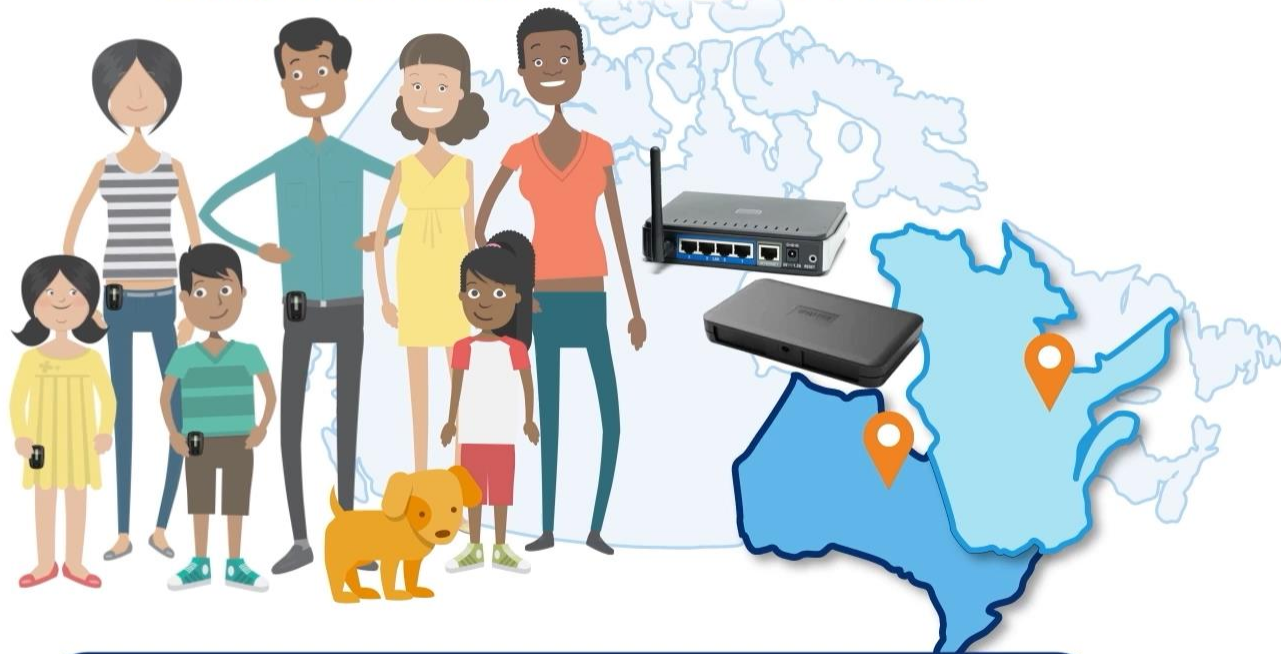
Linear
TV

Digital
Video

Cross-Platform Video
VAM

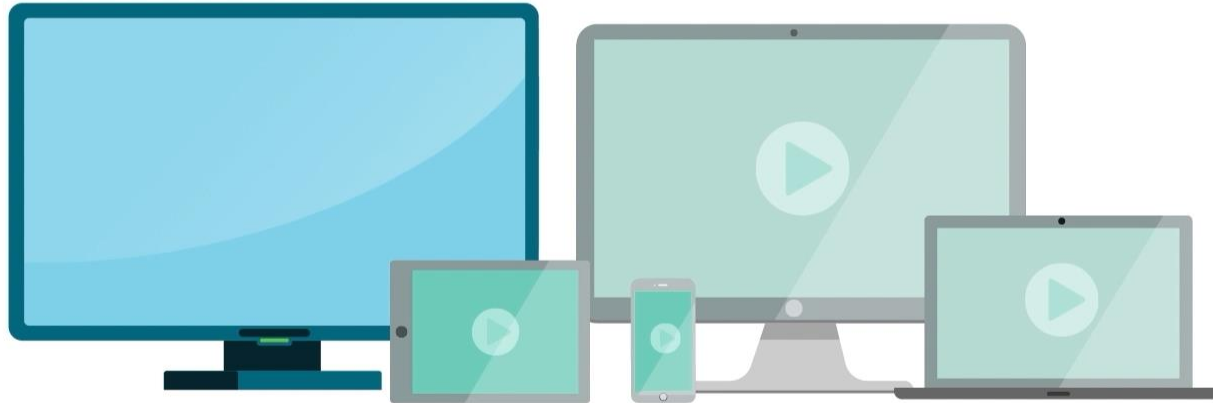
Cross-Platform Video
Single Source

Cross-Platform Video VAM Ontario and Quebec Panel



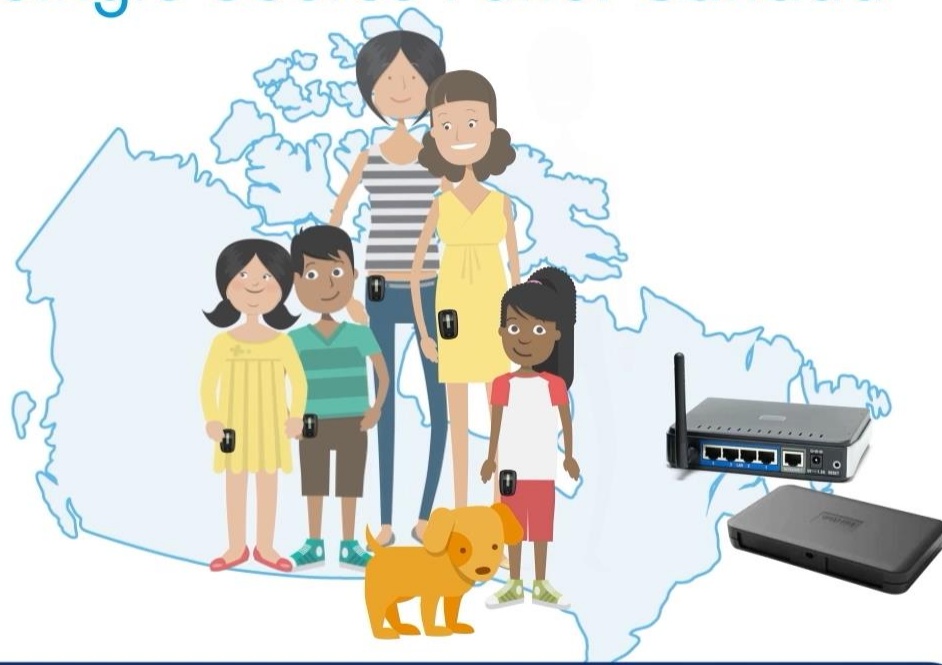
Video Consumption

Broadcast TV & On Demand and live streaming video



Cross-Platform Video Single Source

Cross-Platform Video Single Source Panel Canada



Linear
TV

Digital
Video

Cross-Platform Video
VAM

Cross-Platform Video
Single Source

Cross-Platform Video Single Source Panel Canada



Panel informed
by Census
Digital Data

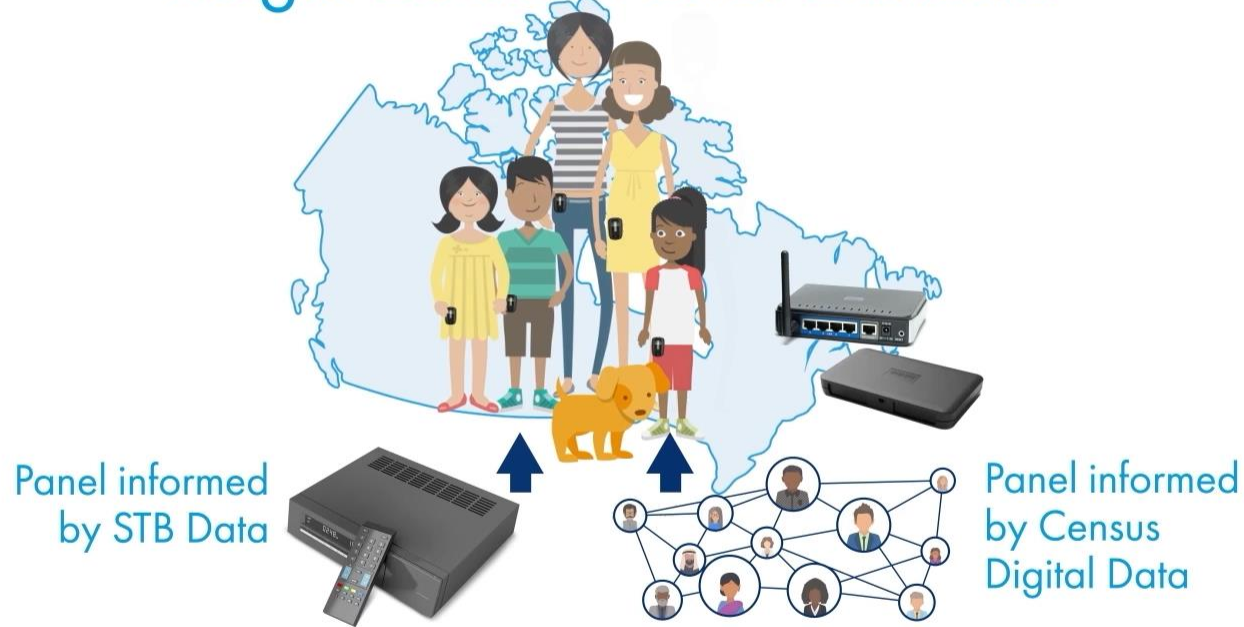
Linear
TV

Digital
Video

Cross-Platform Video
VAM

Cross-Platform Video
Single Source

Cross-Platform Video Single Source Panel Canada



Linear TV

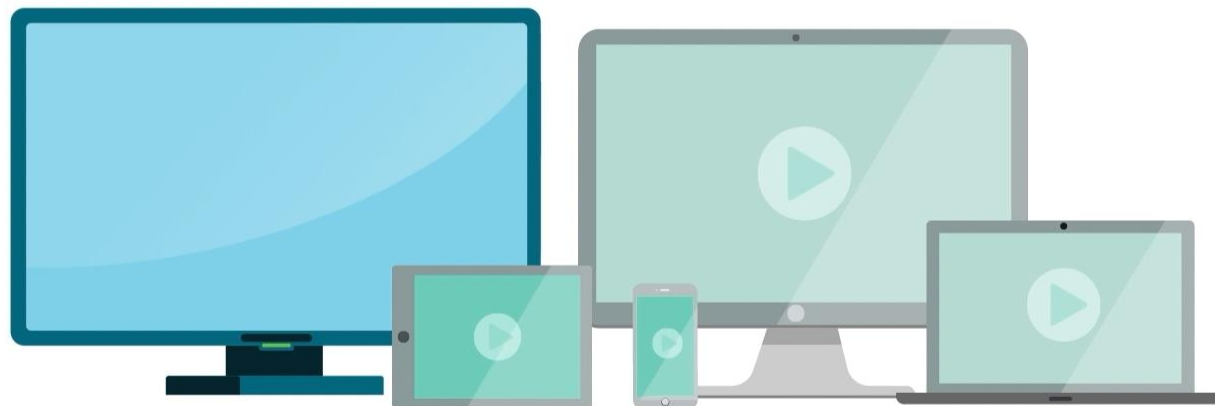
Digital Video

Cross-Platform Video VAM

Cross-Platform Video Single Source

Video Consumption

Broadcast TV & On Demand and live streaming video



Complete Video Consumer Behaviour



Cross-Platform Video has Launched

- VAM is the first iteration of Cross-Platform Video Measurement launched in November 2021 with data from August to September 2021
- Significant marketing and communications supporting clients understanding & adoption: pre- and post-launch
- Launched as a Minimum Viable Product to help industry understand this new dataset and its impact on business





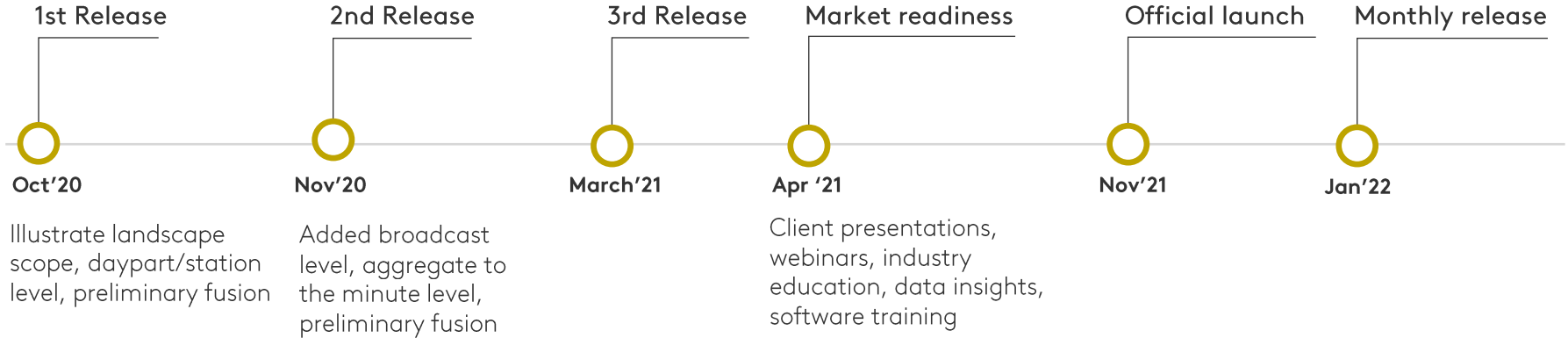
VAM: First iteration of Video Measurement



Journey to data: Building of VAM

High Client & Industry Engagement

Release data early, learn and modify



Early data releases, market feedback

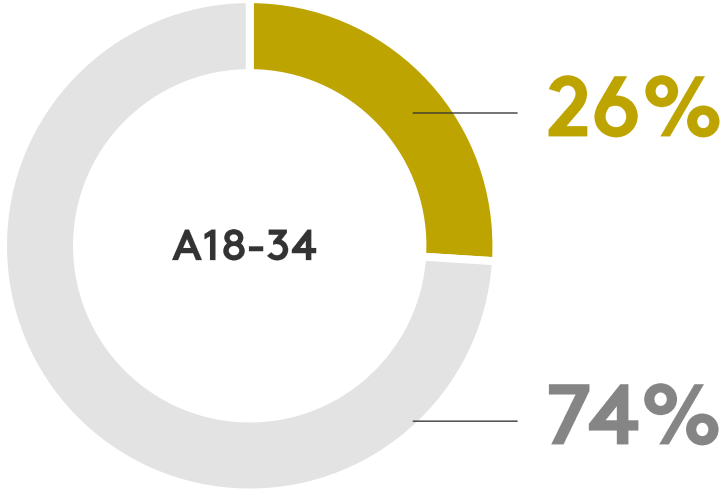
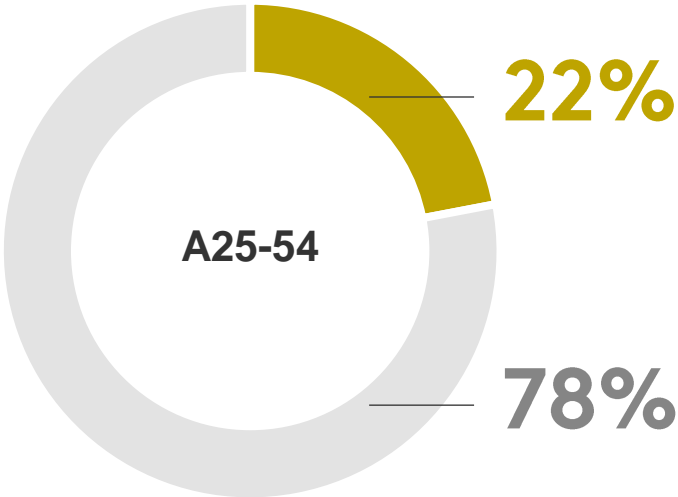
Marketing and client education

Measuring Cross-Platform Video

- VAM provides a stronger understanding of video audience behaviour – on aligned metrics and standards
- New video insights:
 - Total share of viewing - linear & Pure Plays
 - Total streaming by platform, device & demographics
 - Reach by type of viewing and platform & demographics
 - Incremental and unduplicated reach
 - Profiling viewers by platform and device usage
 - Complete video consumer behaviour

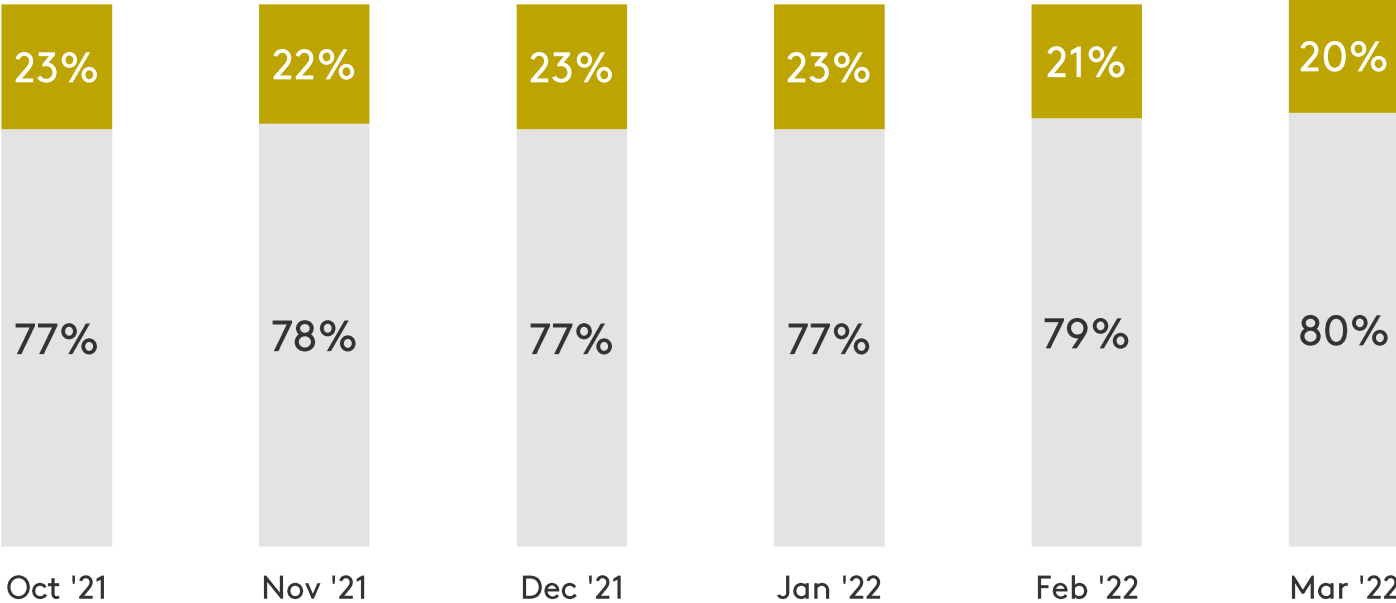


Understanding Video Consumption based on comparable standards



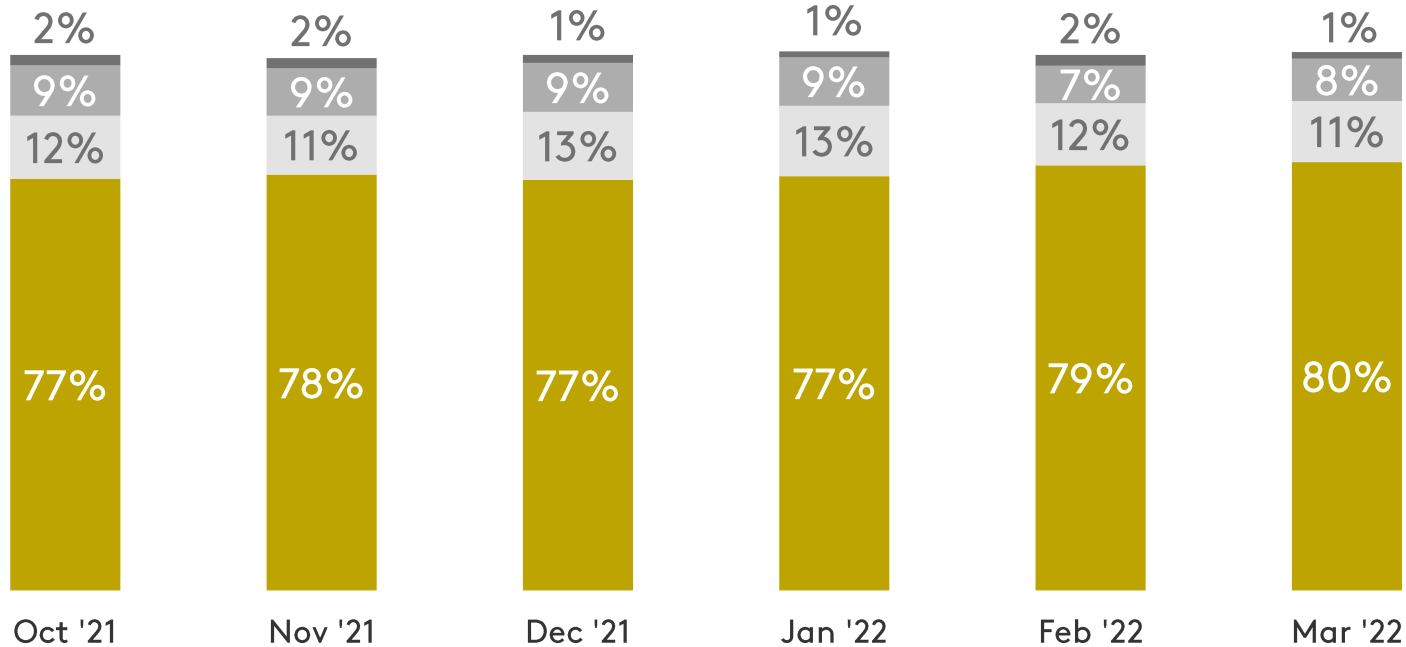
● Linear ● Digital

Understanding trends to help identify opportunities and anomalies



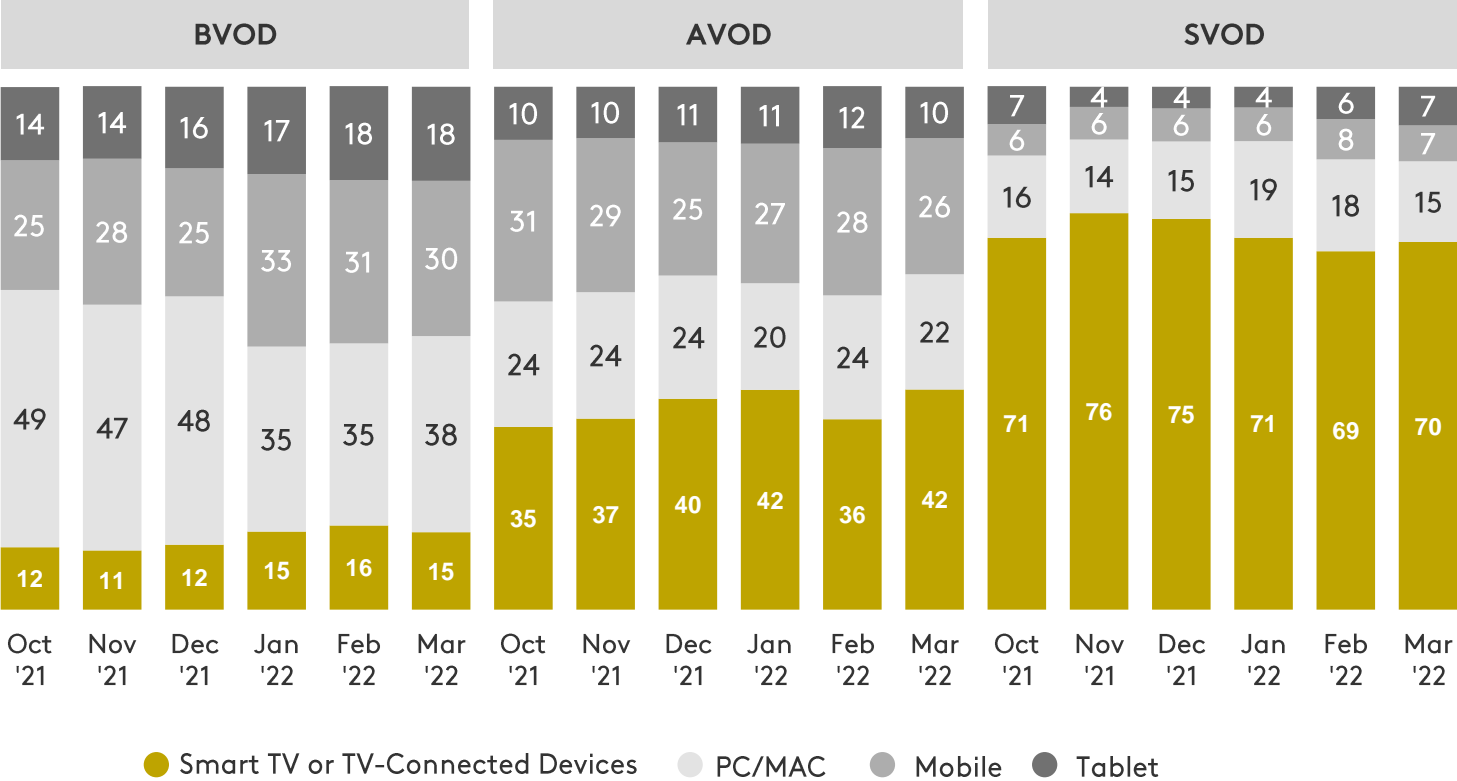
● Linear ● Digital

Understanding what is driving the trend...is it platform?



● Live +7-Day Playback ● AVOD ● SVOD ● BVOD

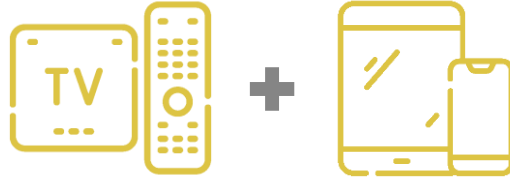
Or is it device?



Understanding Reach: Unduplicated vs Exclusive



Exclusive Reach
of Linear TV
36%

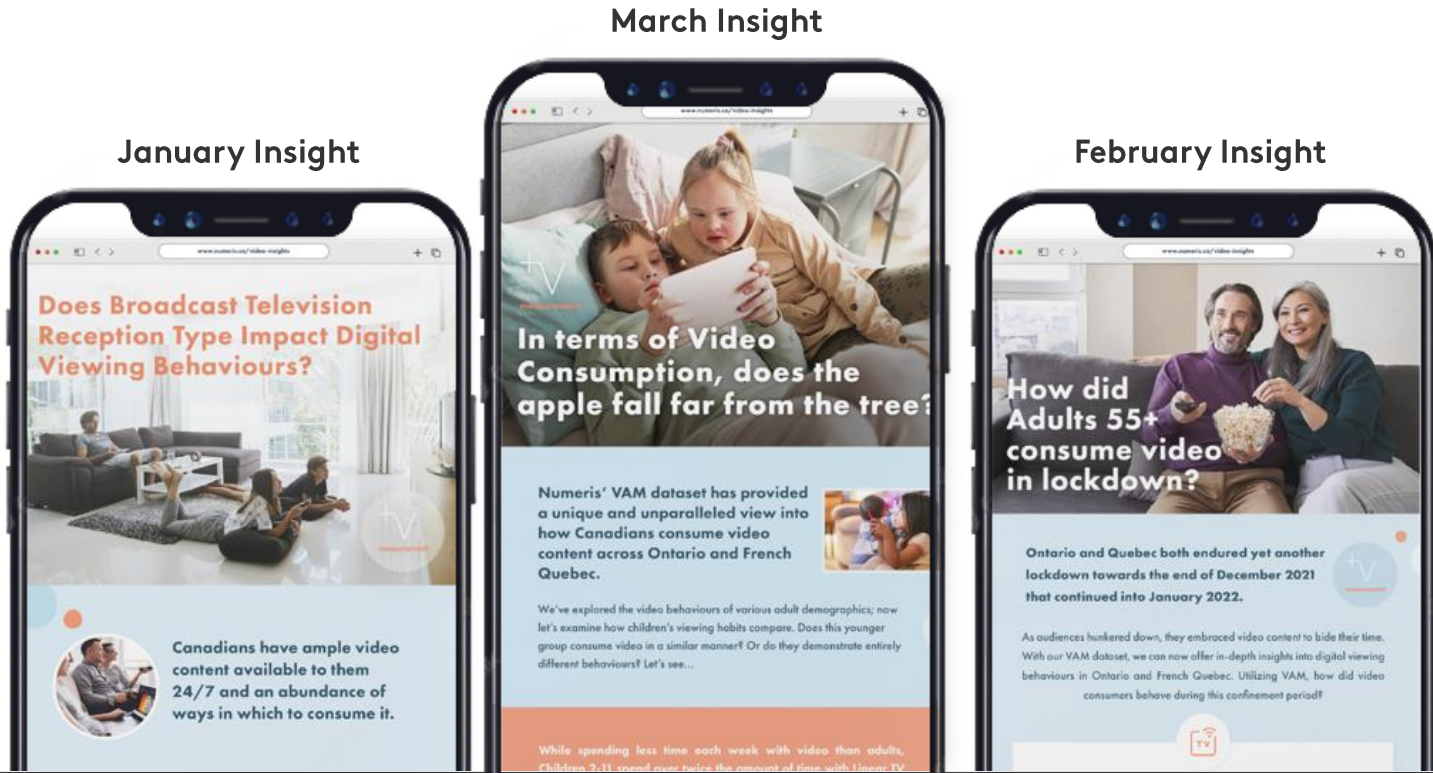


Of those who
watch Total Video
on Linear TV,
60% also watch
streaming



Exclusive Reach
of Streaming
4%

Ultimately: Understanding consumer behaviour



Market reaction

- Positive client feedback and adoption
- Complicated data
- Confirming or blowing up our pre-existing theories
- Impact on actual processes and structures



Market Feedback & Learnings: How to unlock the true value of Cross-Platform

Discussion with Neil & Kristin



Unlocking Full Value of Cross-Platform Measurement

What's next



Our Journey to complete audience measurement continues

Cross-Platform Video Measurement



- Enhancing VAM
- Enhanced TAM
- Complete Video Measurement: National roll-out and moving to Total Video

Cross-Platform Audio Measurement



- Integrating Broadcast Streaming
- On-Demand Audio

Cross-Platform Ad Measurement



- Coordinate Design/Implementation Plan

A diagram illustrating the Golden Ratio (phi) using a spiral of overlapping squares and circles. The spiral starts from a small square in the lower-left and grows outwards, with each new square's side length equal to the sum of the two previous squares' side lengths. The text "Thank you!" is centered over the lower part of the diagram.

Thank you!