

# KANTAR

# THE *not* SUMMIT 2020

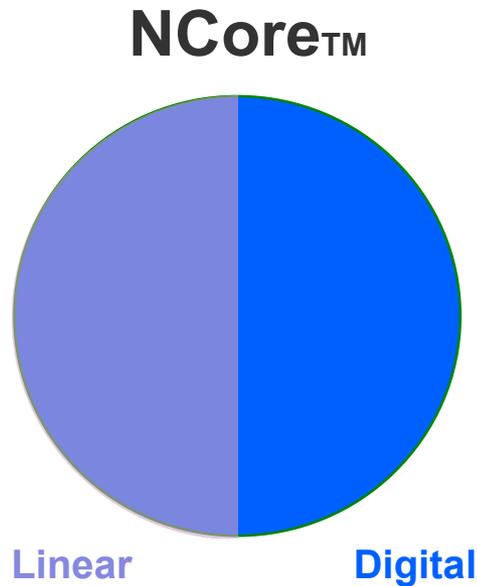
## Leading Cross Media Measurement in Canada

Neil McEaney, President and CEO

Catherine Kelly, VP Product



# In 2018, we introduced NCore

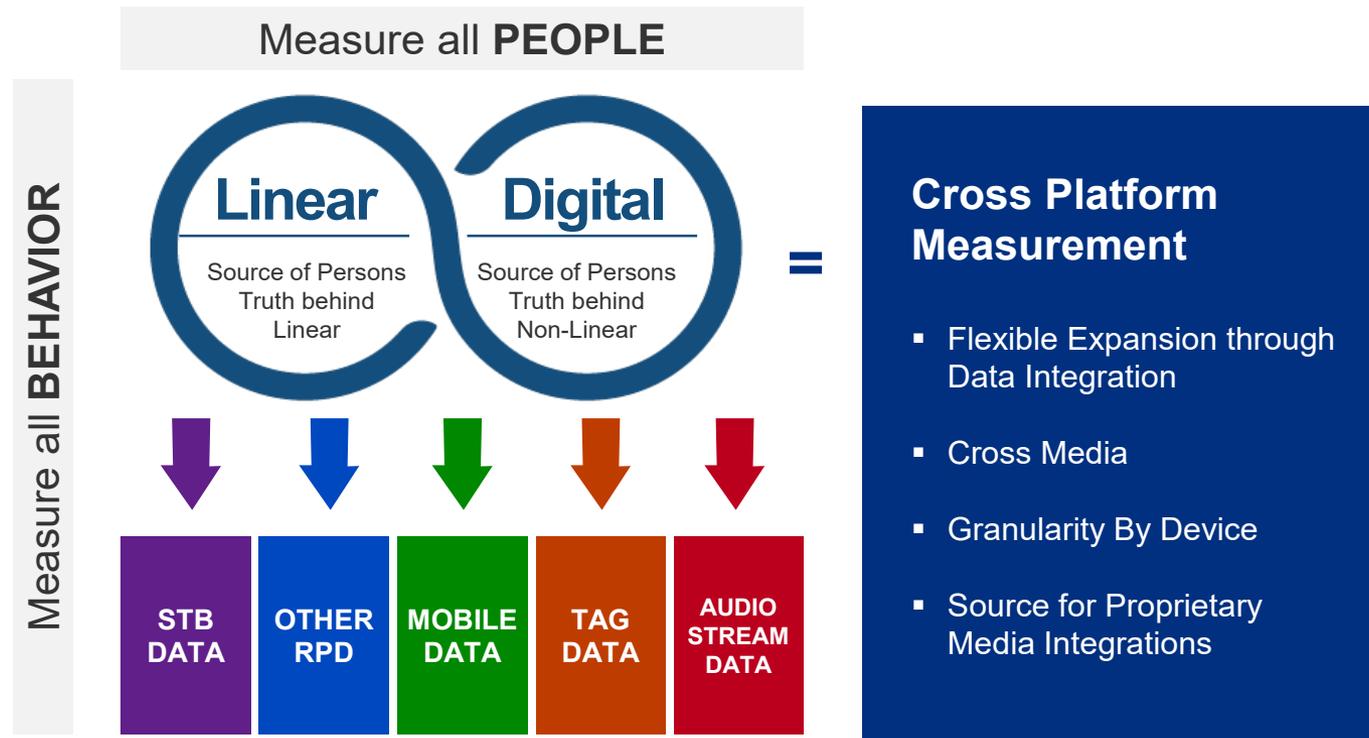


- NCore is the foundation on which all data can provide context and convert into Knowledge. For this to be possible, it **MUST** reflect the whole landscape.
- DATA alone is not knowledge. A contextual balanced living source for consumer information is necessary.

New Consumer Landscape - NCore™

# 2018 was the start of Cross Platform Measurement

## Approach to Cross Platform Measurement



# The Path Forward for Video

**VAM**



Partners:

**KANTAR**

 **comscore**

**Proof of Concept**  
May 2018

**Gated Implementation**  
Fall 2018

**Launch (beta)**  
Fall 2020

Partner:

**KANTAR**

**STB**



**Proof of Concept**  
Fall 2018

**Report to CRTC**  
Jan 2019

**Launch (beta)**  
Winter 2021

# Numeris in 2020...moving to Cross Media Measurement

Building Cross Media in Canada is critical with the our industry needing to better understand a changing media landscape.

Our focus

- Stronger better measurement tools for the future, so we can meet the needs of advertisers and the industry.
- Expanding our view to include the industry investment in digital.
- Using big data, and analytics to bring more complete, timely and relevant measurement
- Working to bring the WFA's vision together in Canada
- New...Numeris cross media strategy includes Audio

# Moving Towards Total Video

## Where are we?



**VAM**

**VAM  
Panel and Digital Data  
Census**

Beta for 2 markets about  
to release

National Build planning

Fall 2021 Total Video  
release



**Enhanced TAM (ETAM)  
Panel and RPD Data**

POC completed

Participating Cable  
providers = 88% of  
subscribers in Canada

Build begins, Pilot data  
anticipated late Spring 2021



**ETAM**



# The Opportunity of RPD



## Bigger Sample

- RPD Data from a multiple of providers may provide a reasonable geographic coverage of 60% of households in Canada.
- Larger sample size may increase the reliability and precision of estimates.



## Improved granularity

- Massive samples may allow for depth of audience examination through completion of panel gaps in tuning.
- Niche programs or stations ('long tail') that have less panel reported audiences may see significantly more viewing occurrences with RPD.



## Landscape Completion

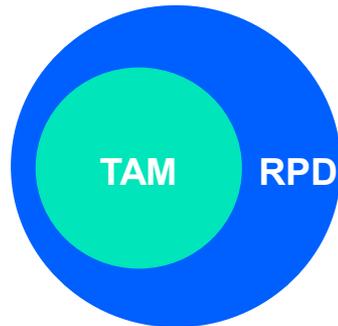
- Previously unreported by PPM unencoded stations (such as US Spill, ethnic, and smaller non-member Canadian digital stations) will appear in the dataset.

# Numeris Enhanced TAM Scenario

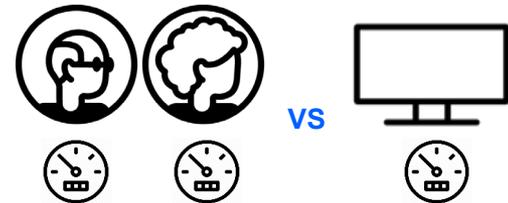


Channel map to capture market complexity.

Need to align within BDUs data.



Different treatment for encoded and non-encoded content.

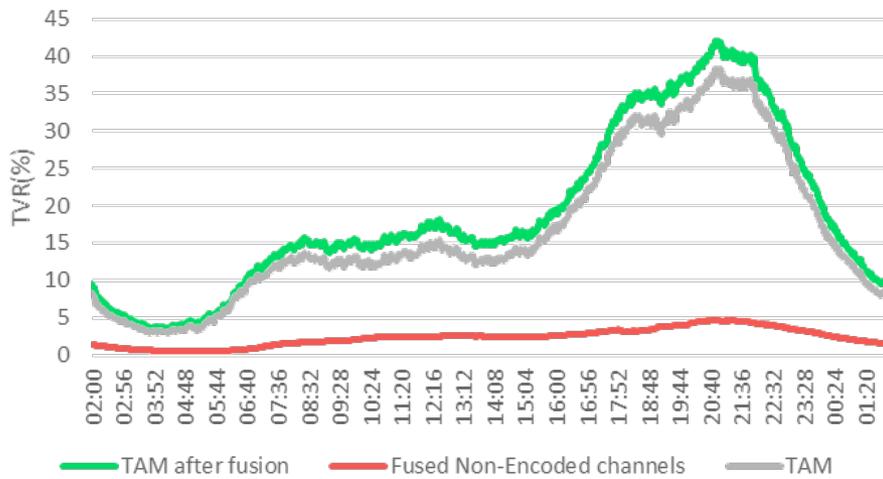


Isolate TAM content coming from devices connected to STBs.

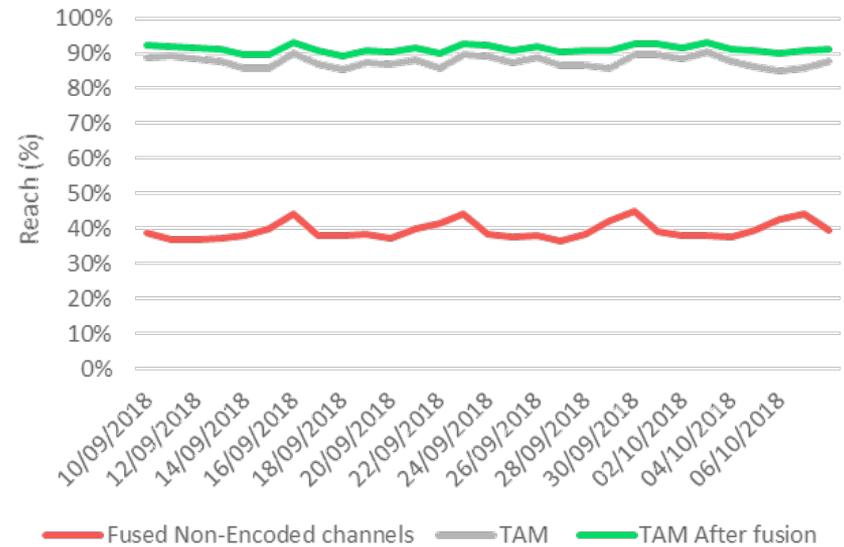
Fusion at home level plus filter out individuals.

# POC Fusion Results

BDU 1 Fusion. Average weekday Home ratings



BDU 1: Fusion. Daily Home Reach



# TAM & RPD Integration PoC

## Results by Station Category

Unencoded



Mo-Su 2a-2a AMA 2+	CDN CONV	CDN DIGITAL	CDN PAY	CDN SPEC	INT'L 3rd LANG	US CONV	US SPEC	Total TV
PPM TAM	1518	576	134	1768	3	160	333	4500
TAM + RPD	N/A	612	142	1788	20	257	341	4621
% Change	N/A	6%	6%	1%	637%	61%	2%	3%

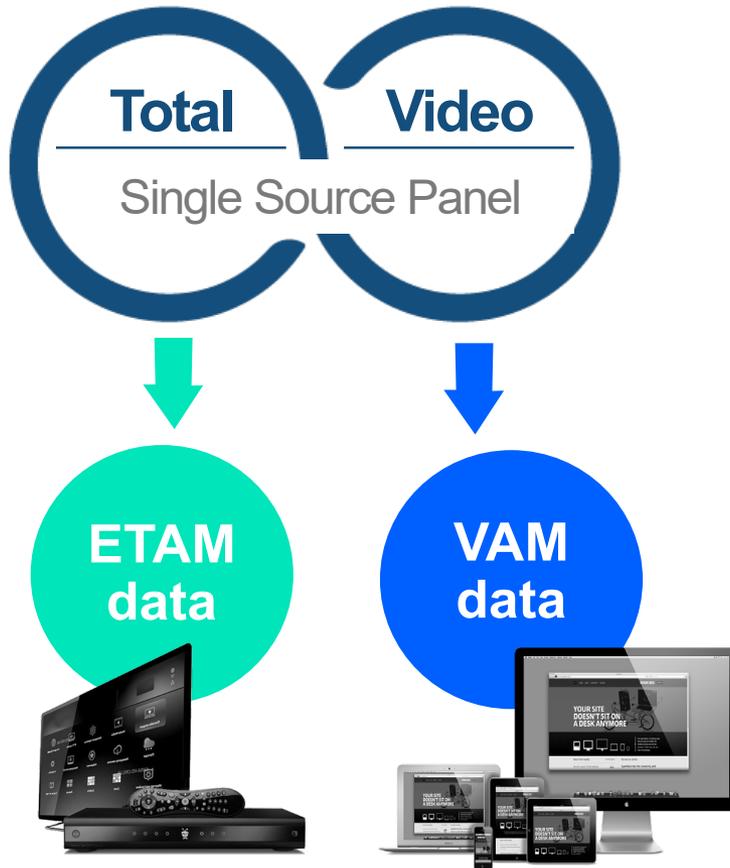


Anglo/Franco TAM

# The New Enhanced TAM (ETAM)

- Numeris has chosen to move ahead on the path to integrate RPD data with PPM panel data
- There are 5 BDUs for inclusion in the final solution
- Fused sample sizes are anticipated to include approximately 350,000 STBs from RPD sample across the spectrum of providers
- There were opportunities to maximize RPD that were not fully explored, which we intend to do during the rollout and pilot this year

# Total Video coming together in 2021-22!



- Linear behaviour underpinned by STB
- Digital behaviour through census level tagging data

# Moving towards Cross Media

**COMING THIS YEAR!**

## Numeris Total Audio Strategy

- Making measurement whole, through streaming data integrations
- Add the Audio Landscape
- Expand measurement across markets

**More next year!**

# What's Next?

**This Fall and into 2021, advertisers, agencies and publishers will start working with Cross Platform data**



**New metrics to be confirmed, in time for release of VAM data**



**Development of 1st phase of enhanced audio measurement**



**Continued collaboration with industry groups in building towards Cross Media**

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Thank you

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Catherine Kelly, VP Product

