

Moving from Multi-Platform to Cross-Platform

IAB Digital Marketing Summit 2017 - Toronto

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Content

- Today's Multi-Platform Canadian Consumer
- New Data on Multi-Platform Video Consumption
- What's Next?
 - The Shift to Cross Platform Audience Measurement
 - Data Activation

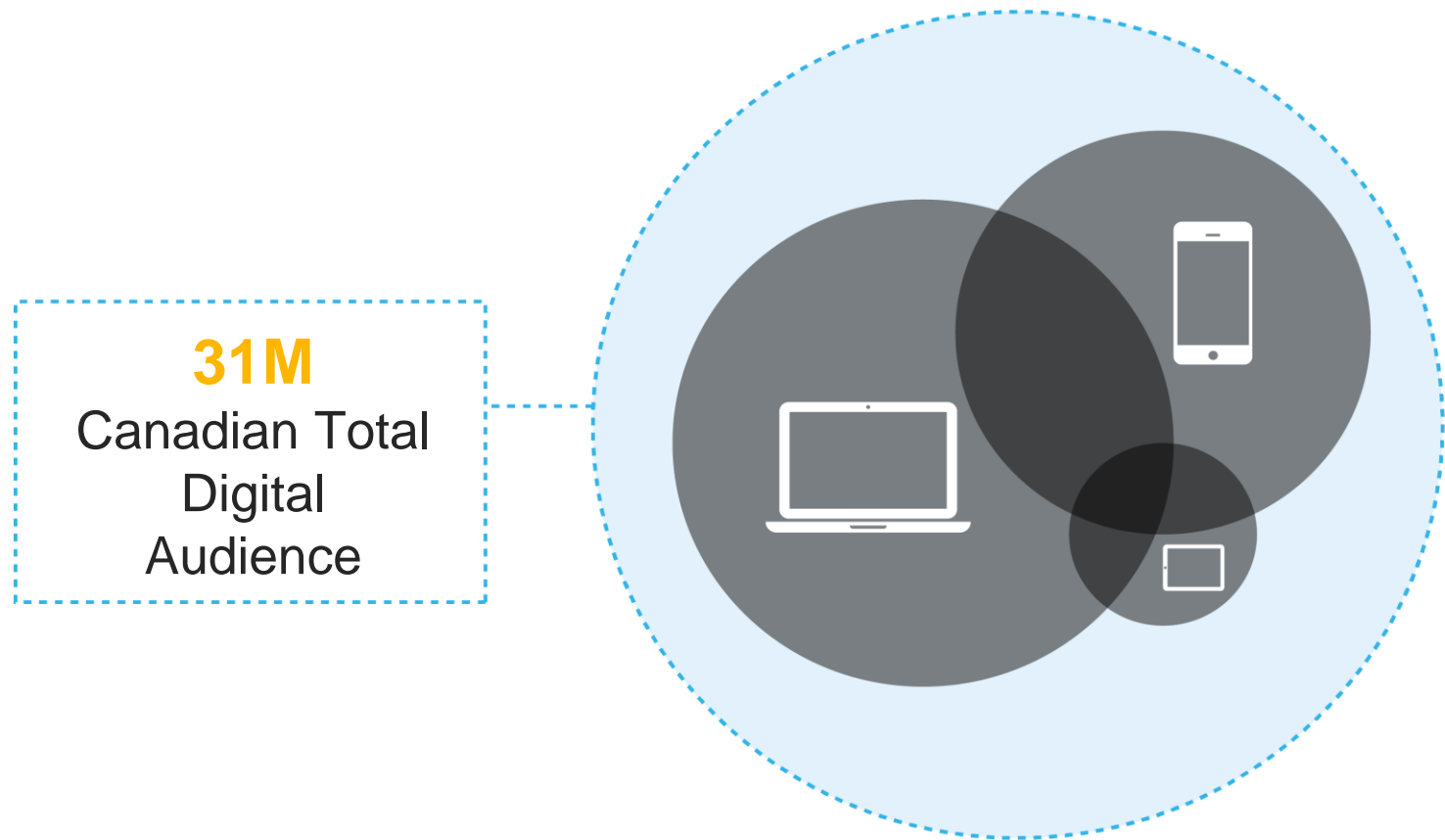


Today's Multi-Platform Canadian Consumer

Tracking unduplicated total digital audience
across Desktop/Laptop, Smartphone and Tablet
devices



31M Canadians are Online...



...Across Desktop, Smartphones and Tablets

28M

DESKTOP
Visitors



21M

SMARTPHONE
Visitors



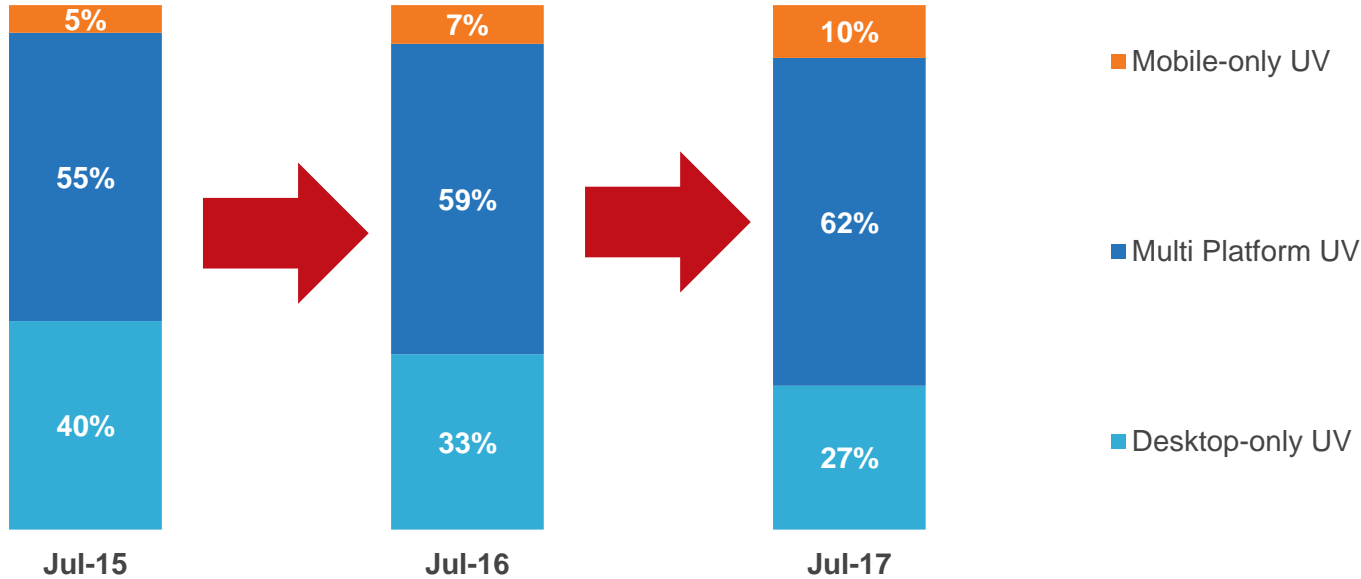
12M

TABLET
Visitors



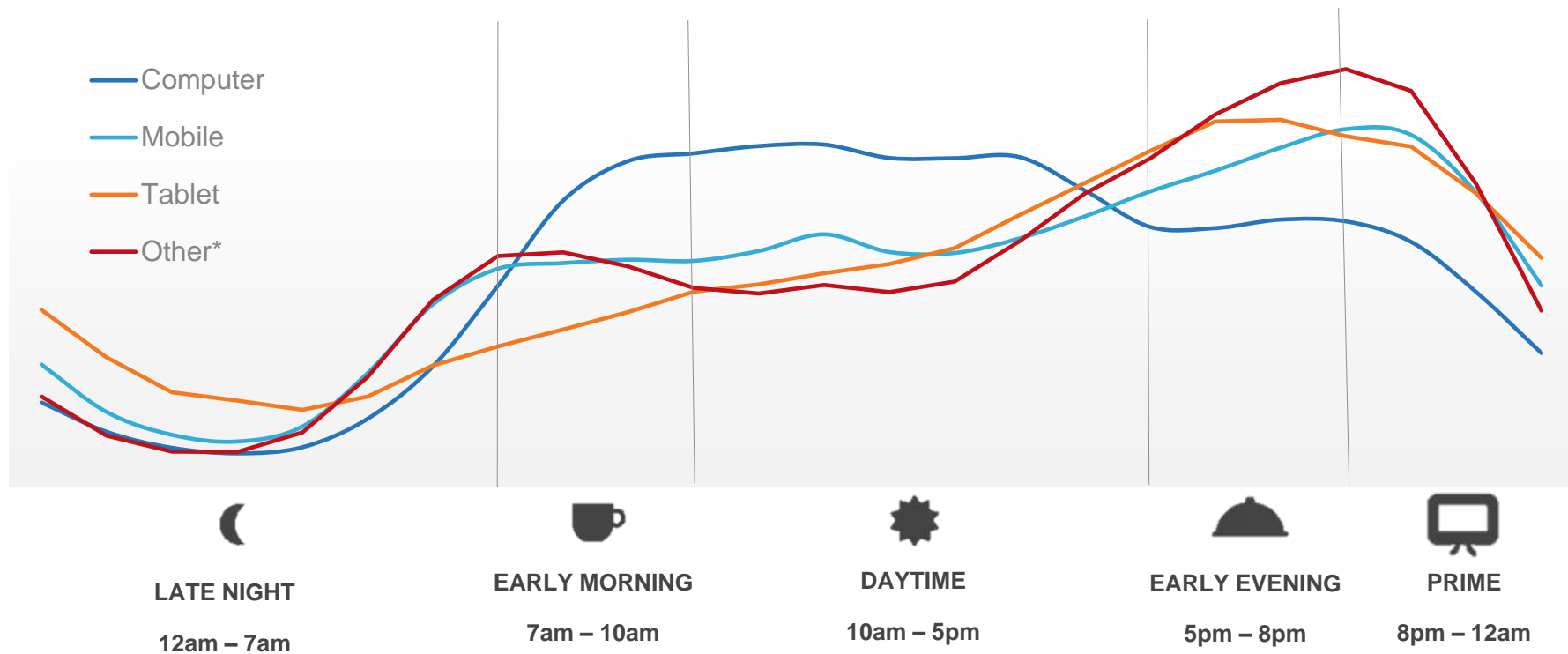
Canadians using both Desktop and Mobile are on the Rise

% Total Unique Visitors



Canadians Predominantly Use their Desktop/Laptops during the Morning Hours and Early Afternoon

Device Usage by Daypart



Hot Off the Press: The Global Mobile Report

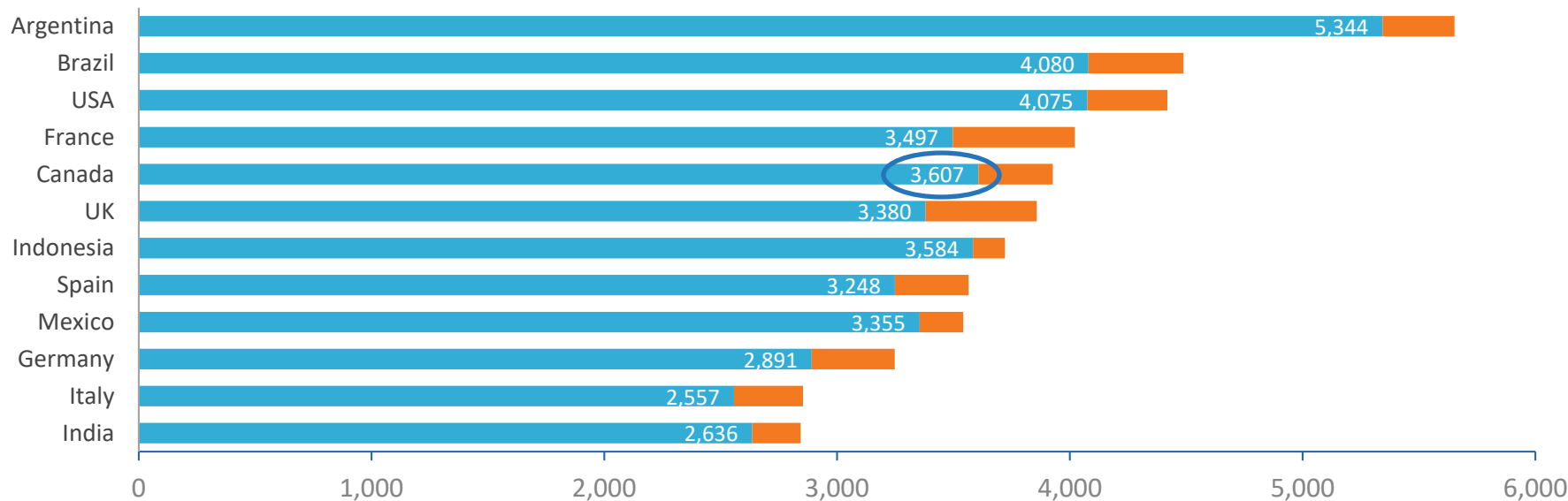


App time is universally a larger contributor than mobile web

The refined user experience and functionality of apps has led to their dominance of mobile time

App Average Minutes per Visitor

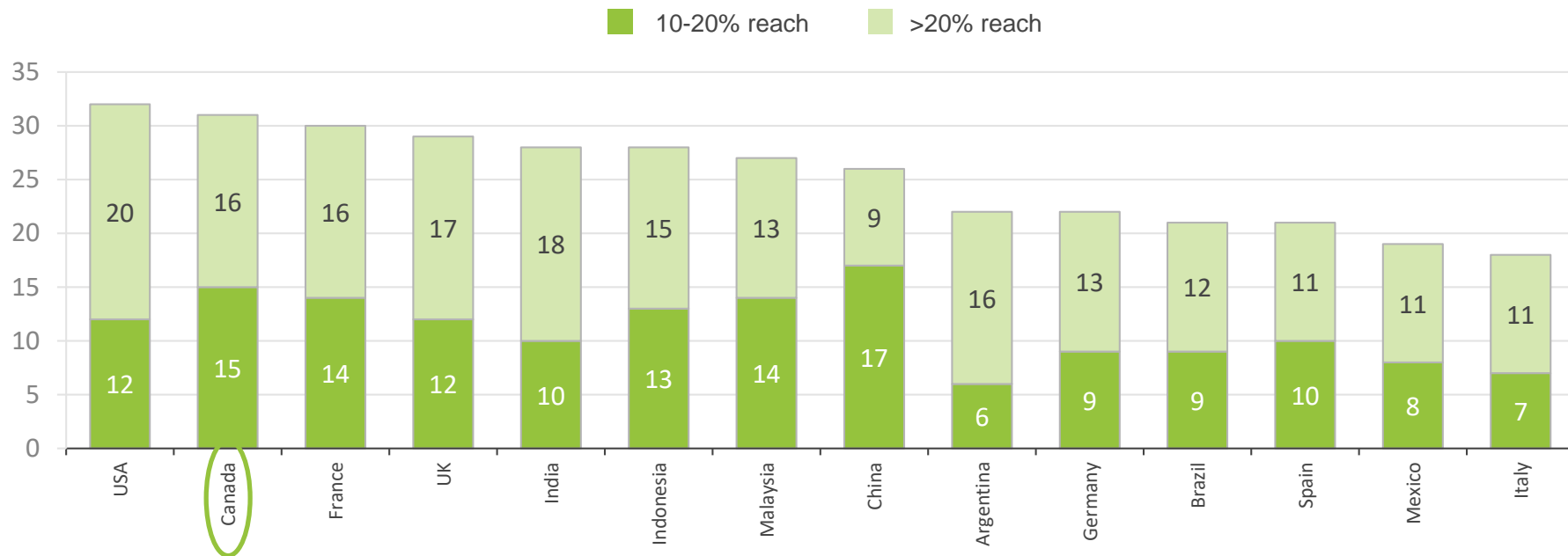
Mobile Average Minutes per Visitor App Average Minutes per Visitor



App reach still dominated by a small number of apps

Only US and Canada have over 30 apps reaching more than 10%

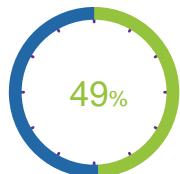
Number of Apps Within Reach Brackets



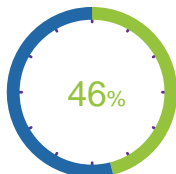
Reliance on top 30 for mobile minutes is consistent globally

The top 30 apps in all markets generate over 40% of all mobile minutes, and around 60% in Indonesia, Malaysia and Mexico

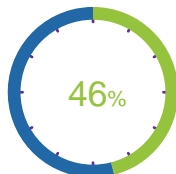
Top 30 Apps' Share of Total Mobile Minutes



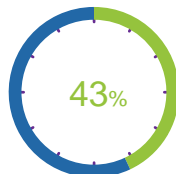
USA



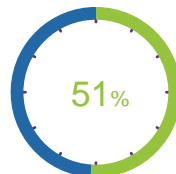
Canada



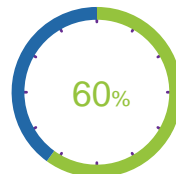
France



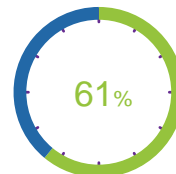
UK



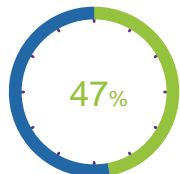
India



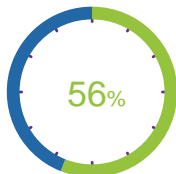
Indonesia



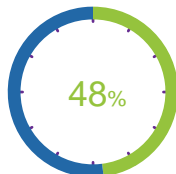
Malaysia



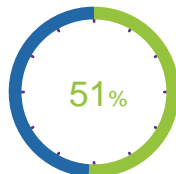
China



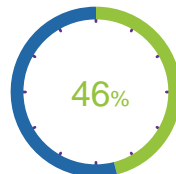
Argentina



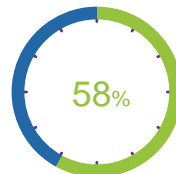
Germany



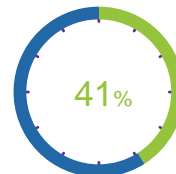
Brazil



Spain



Mexico

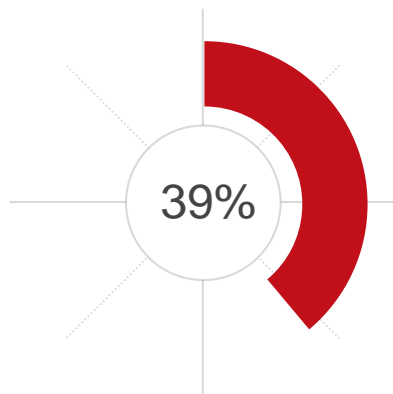


Italy

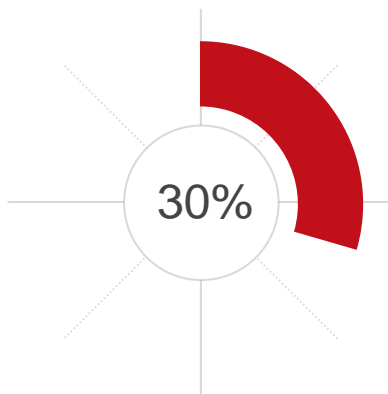
Fewer than 4 out of 10 mobile users purchase in a month

Under half of all mobile users in three major markets are making mobile retail transactions

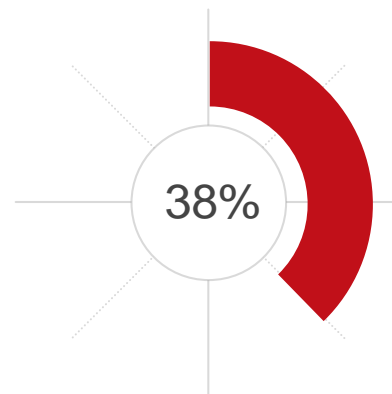
% Making a Retail Purchase on Mobile in a Month



 USA



 Canada



 UK

New Data on Multi-Platform Video Consumption



31M Canadians reached through video content across desktop and mobile devices



Total Digital Video

30.7M

Canadians can be found online watching videos



Desktop Video Audience

28.2M

Canadians are reached online from their desktop watching videos

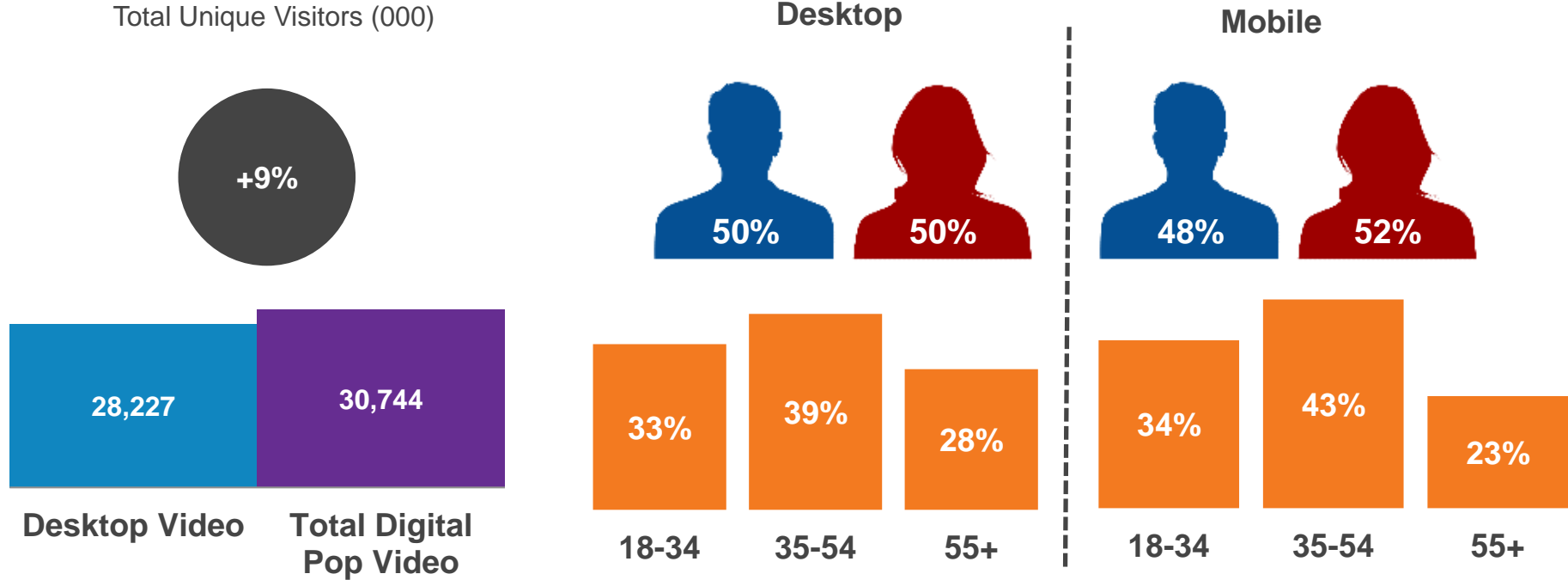


Mobile Video Audience

21.1M

Canadians are reached online via Mobile smartphones and tablets watching videos

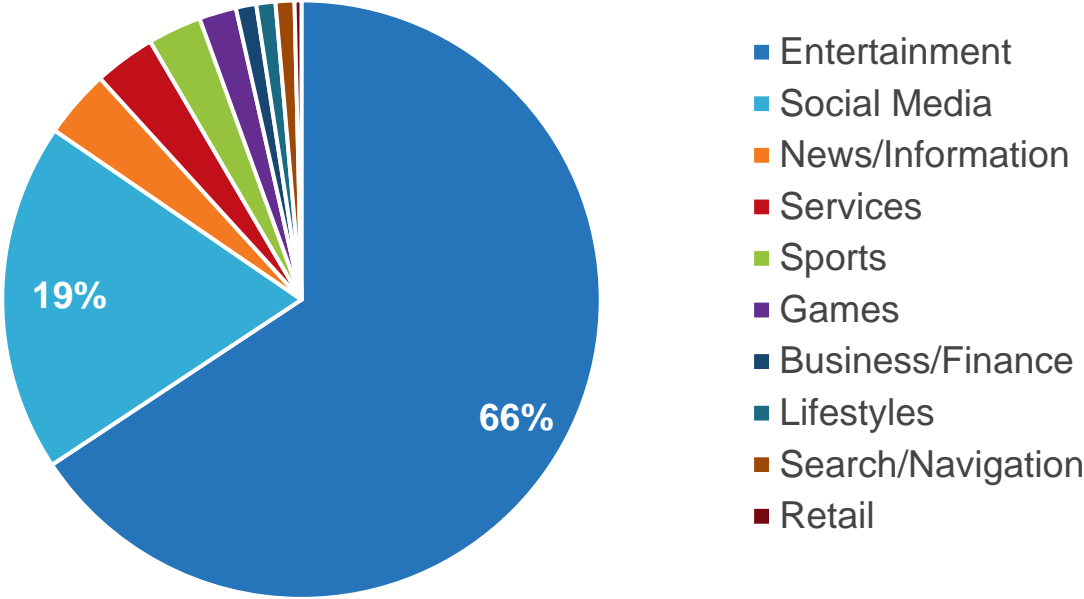
Mobile video usage skews slightly female and A35-54



Canadians love their Entertainment video content

Top 10 Categories across Desktop Video

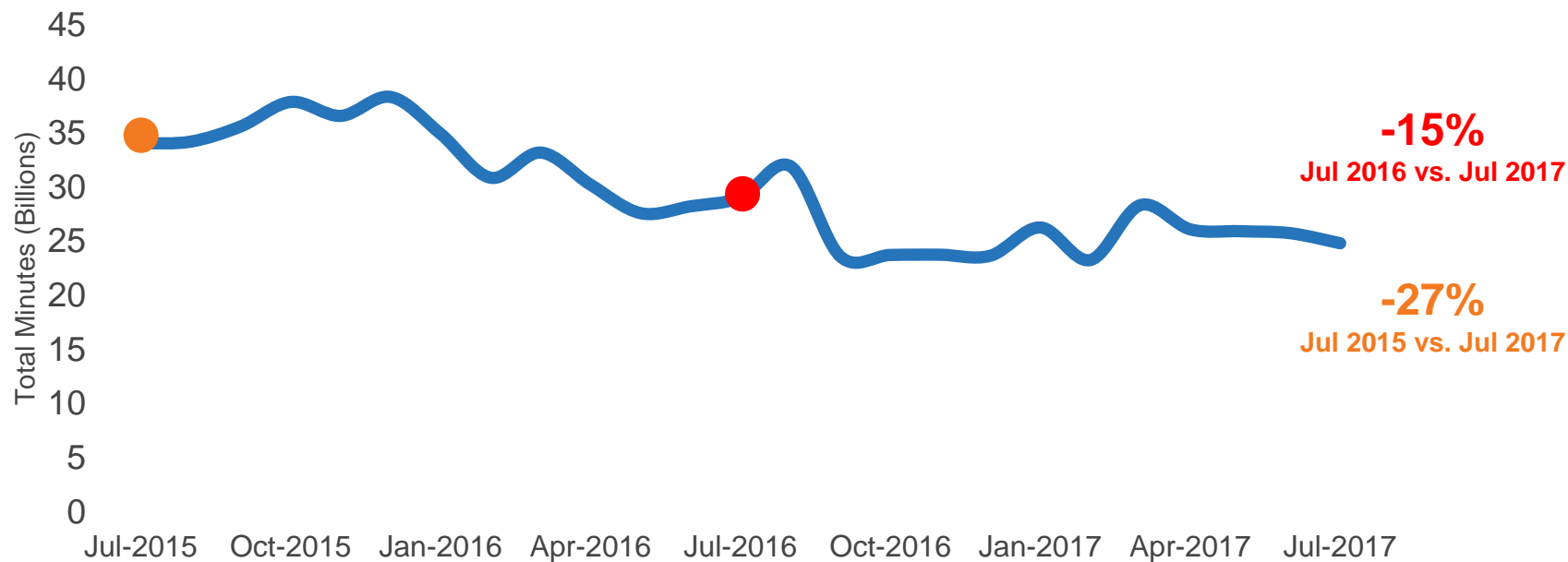
% Total Videos



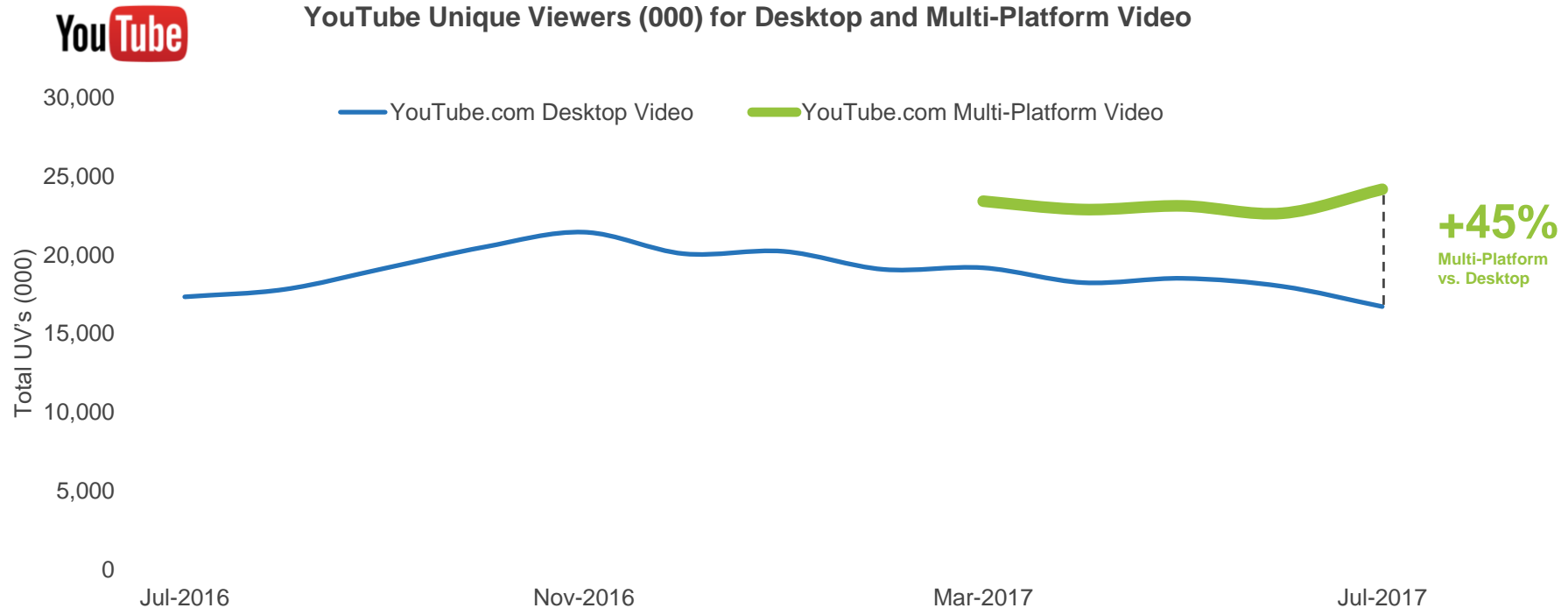
Source: comScore, Inc., Video Metrix Multi-Platform, Desktop, CA, Persons: 2+, Monthly Q2 Avg. 2017
*Top 10 Categories in Videos (000) does not include XXX Adult, Corporate Presence, Promotional Servers and Portals data

However, video time spent across desktop devices have seen steady declines over the past two years

Total Minutes (Billions) Spent on Desktop Video



Led by YouTube, consumption has shifted to Mobile Video



Close to 60% of video viewing on YouTube now happening on smartphones and tablets



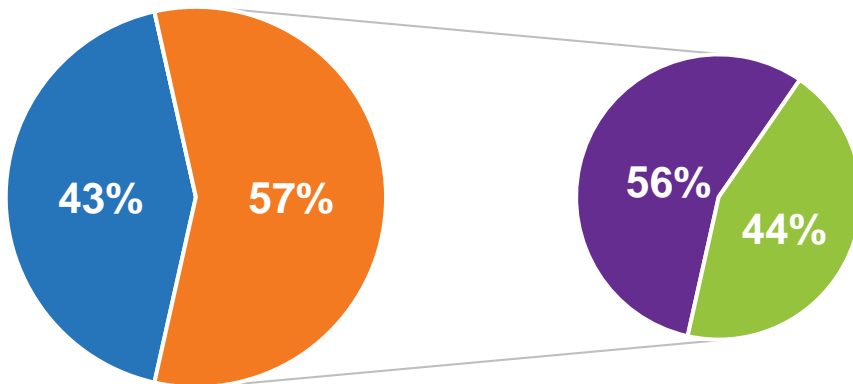
YouTube Share of Time Spent by Digital Platform

Desktop

Mobile

Smartphone

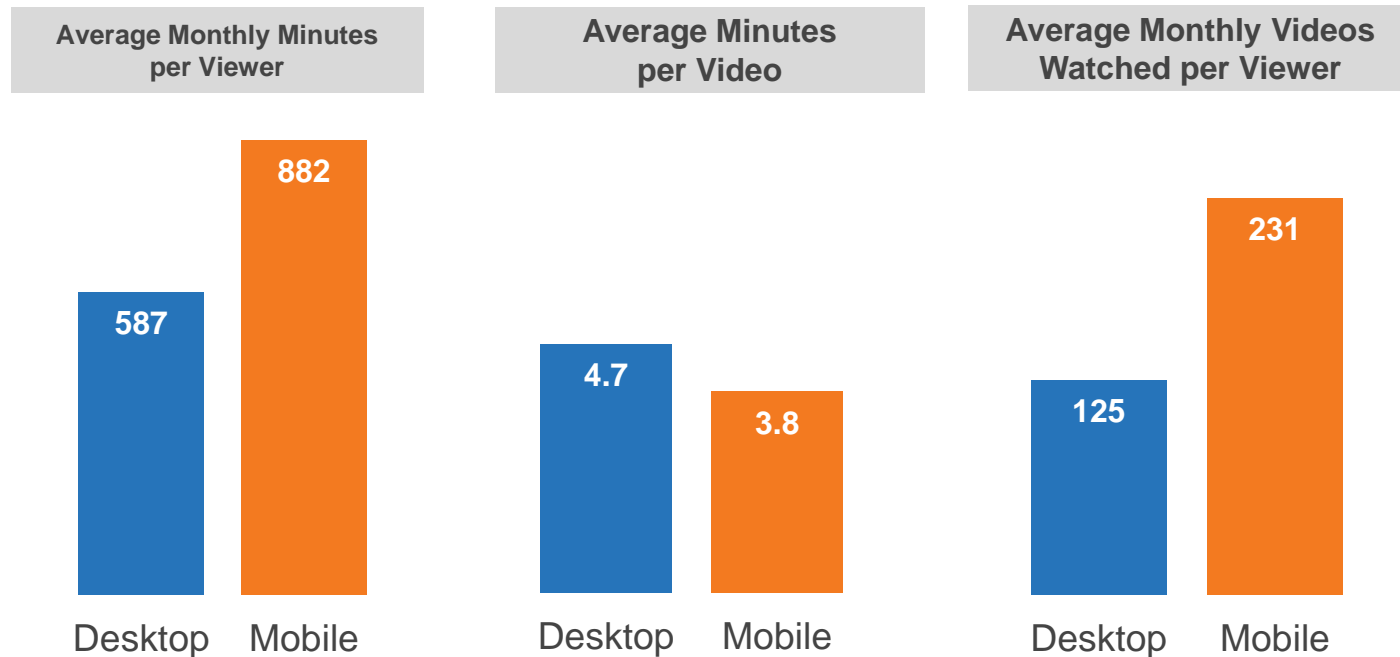
Tablet



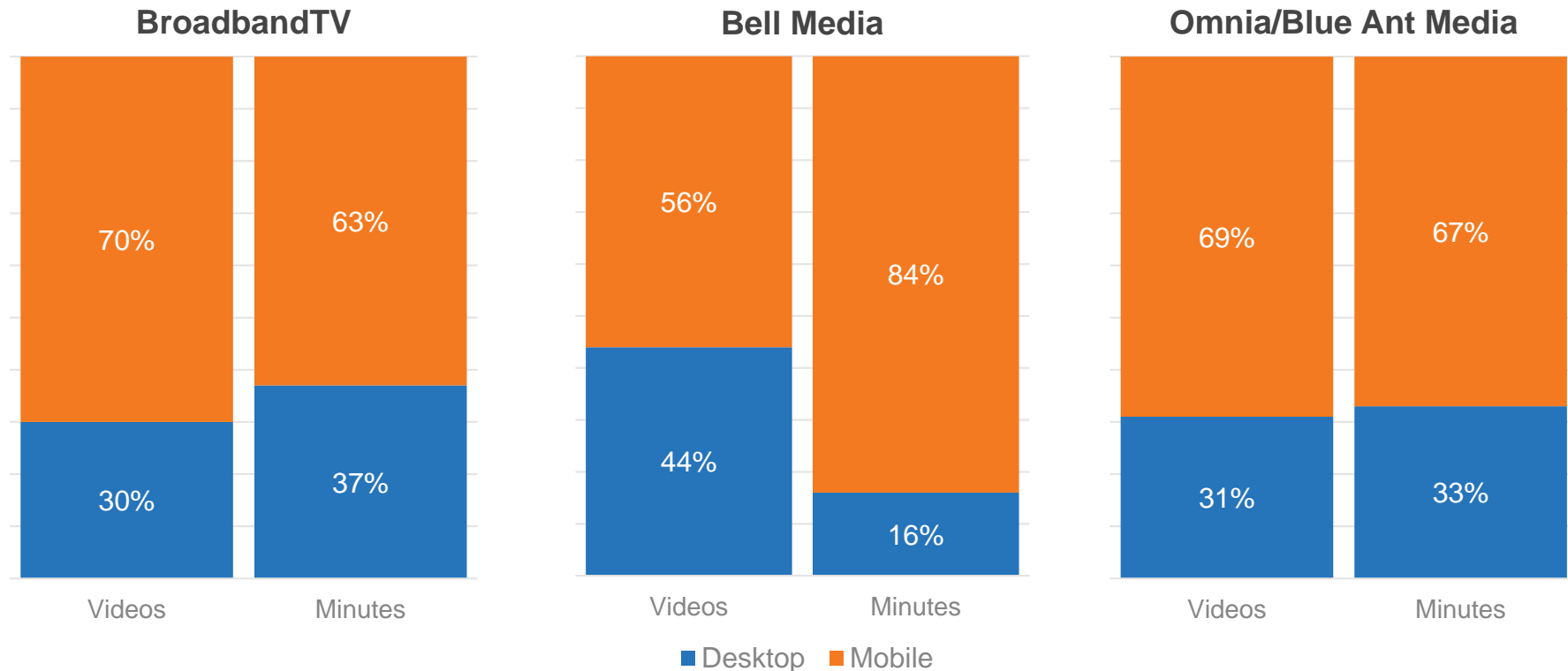
Mobile YouTube viewing is shorter-form but much more frequent, leading to almost 2x as many video views on mobile overall



YouTube: Engagement Metrics by Platform



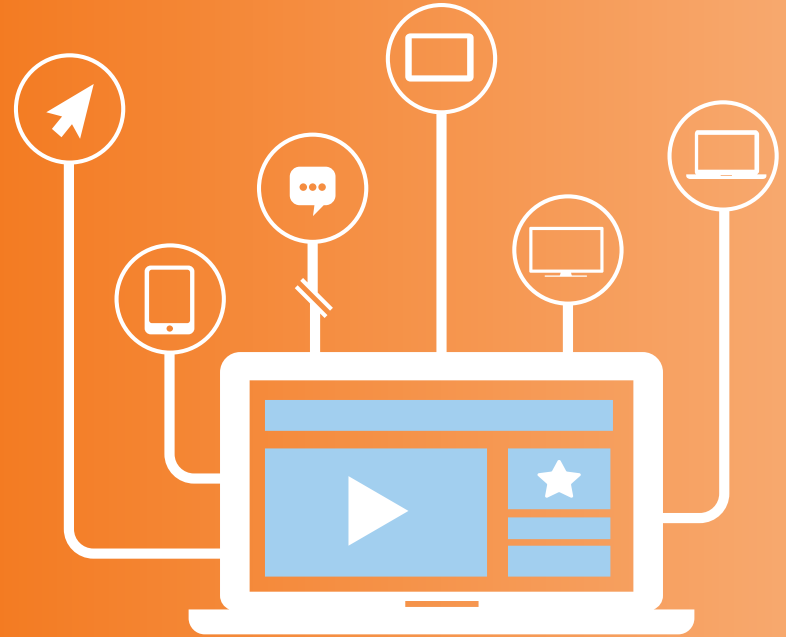
Mobile video now accounts for majority of time spent across Canadian content producers/providers



What's Next?



The Shift to Cross Platform Audience Measurement





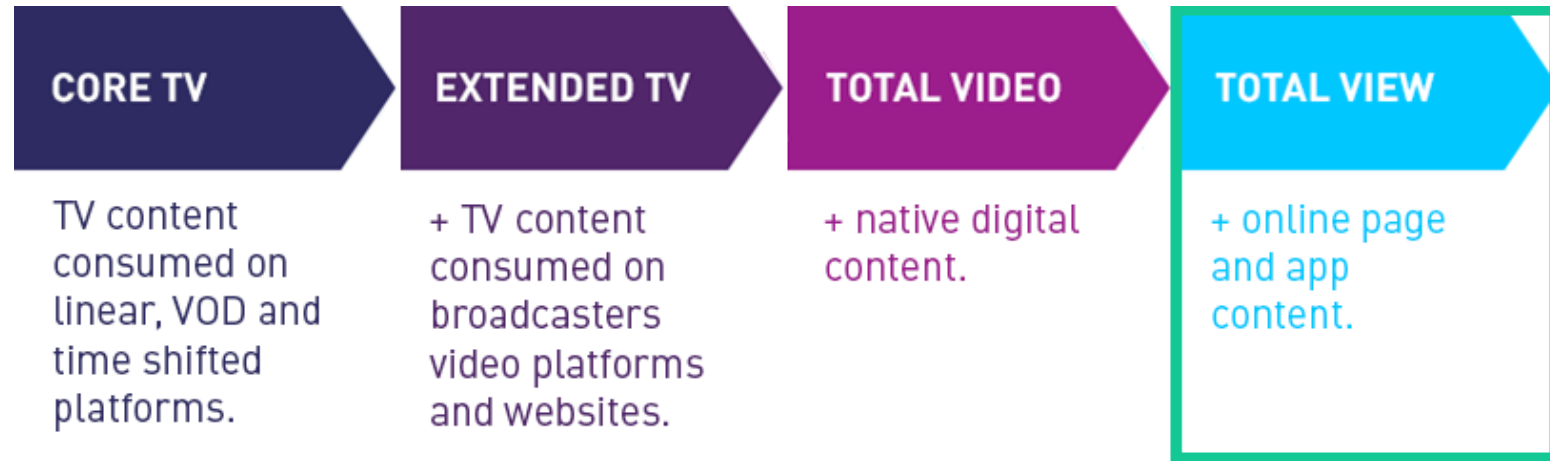
October 12, 2017

NUMERIS TESTING CROSS PLATFORM AUDIENCE MEASUREMENT IN CANADA

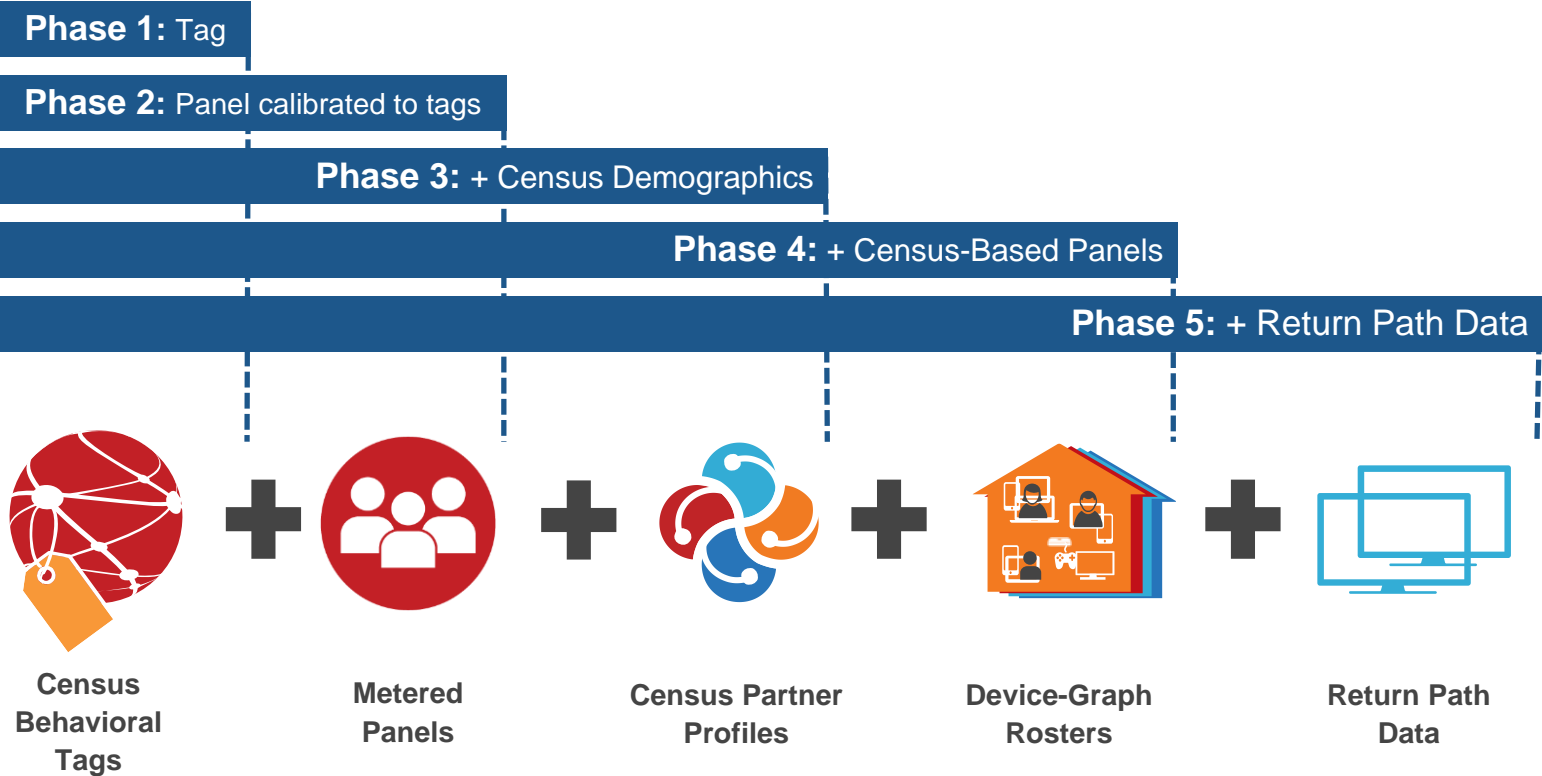
Numeris' members have taken a major step towards Cross Platform Audience Measurement today with the announcement of their selection of a technology partner to test their new measurement solution.

In October 2016, Numeris issued a request for proposals (RFP) for a Video Audience Measurement (VAM) solution. This technical solution would bring together linear and non-linear viewing across all platforms and all devices. Today, Numeris announced that Kantar Media has been selected to assist in the development of this exciting new service for Numeris members. Kantar Media has partnered with comScore to provide digital measurement expertise as part of the VAM solution for Numeris.

Cross Platform Audience Measurement: Reporting Types



Cross Platform Audience Measurement: Methodology Phases



Cross Platform Roadmap of Phases + Scopes

c.

TOTAL VIEW
TV + DIGITAL VIDEO +
DIGITAL TEXT/APPS

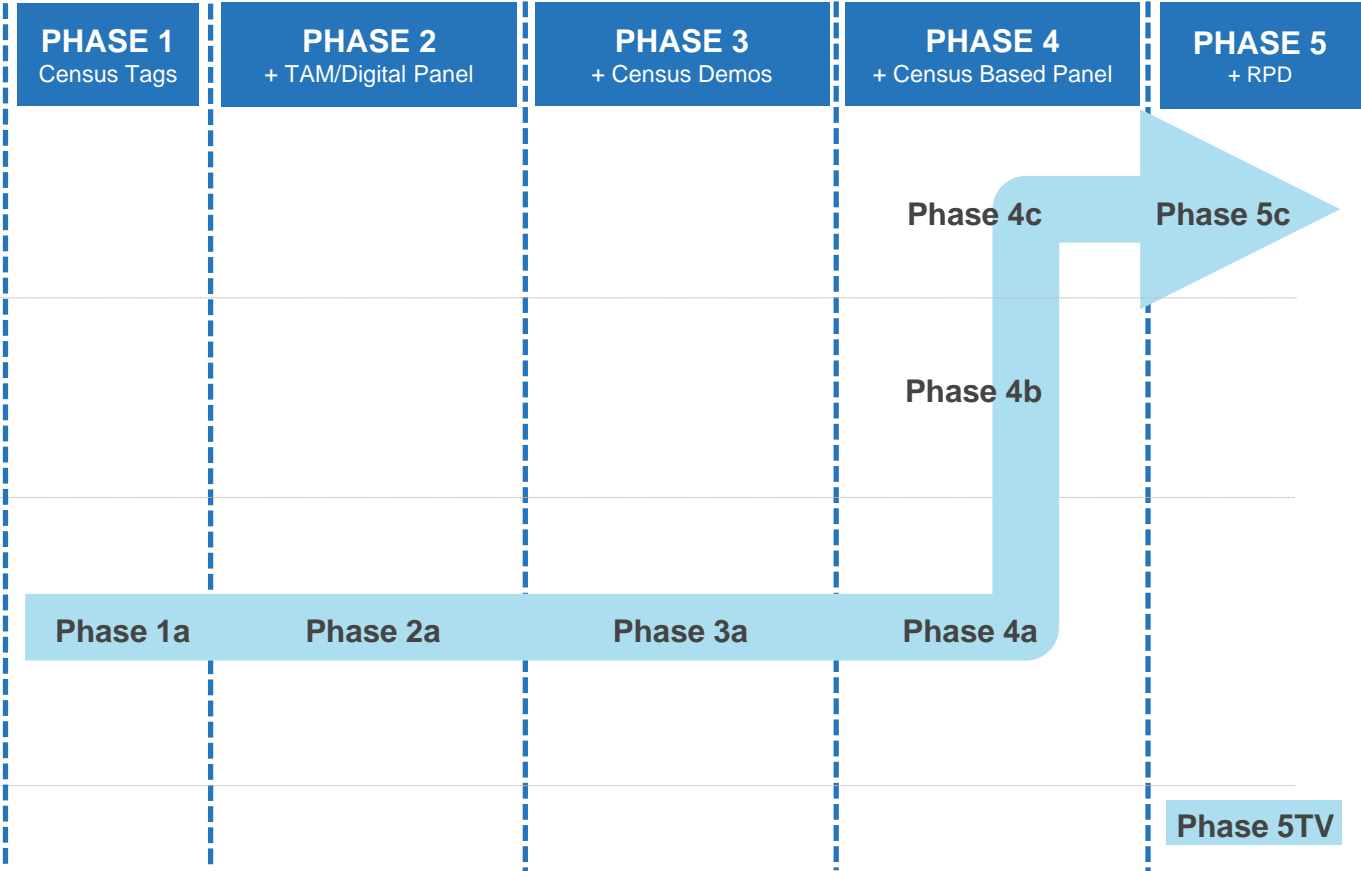
b.

TOTAL VIDEO
TV + DIGITAL VIDEO
(TV ON DIGITAL
+ OTHER DIGITAL VIDEO)

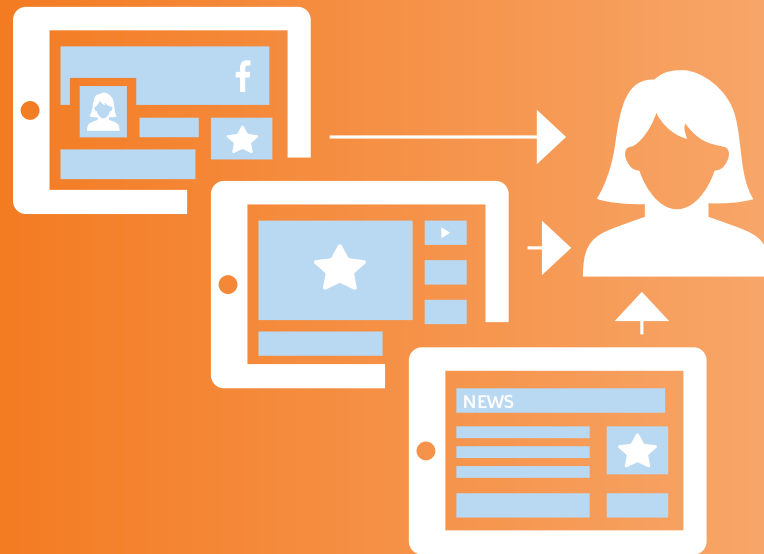
a.

**EXTENDED
TV**
TV + TV ON
DIGITAL

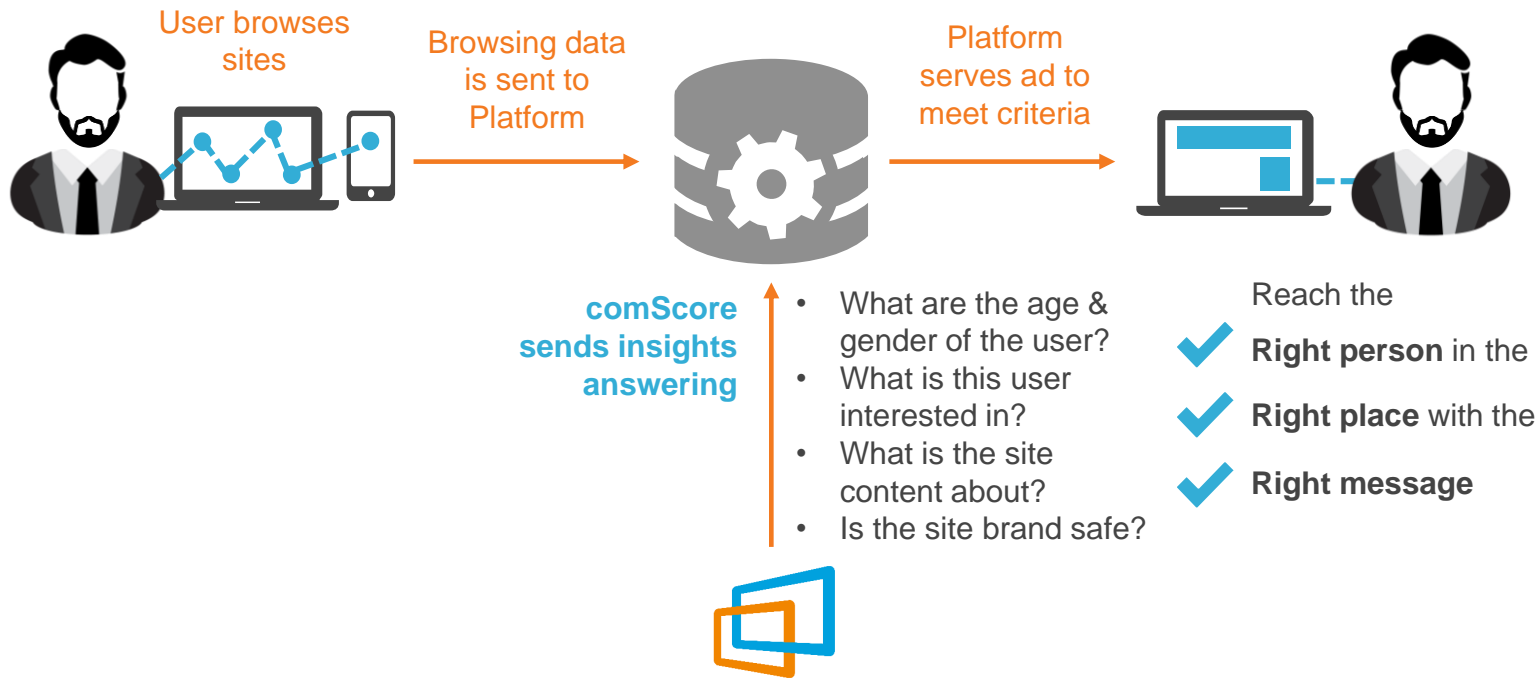
TV. CORE TV



Data Activation



How it works



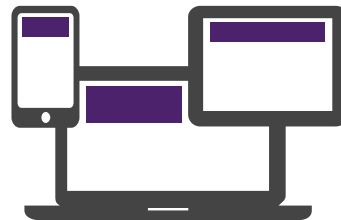
Example: comScore demographics enable digital publisher to surpass 80% in-target guarantee with minimal waste

The Challenge



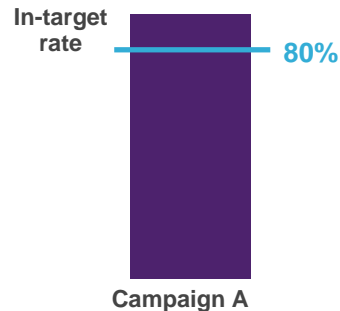
Publisher agrees to deliver client campaign to Males 18–24 at **80% in-target**

The Approach



Publisher matches audience profiles with comScore demographics at the ID-level to expand **Males 18-24 segment**

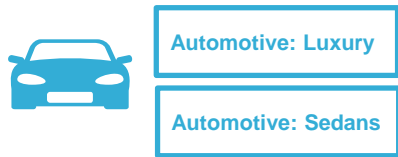
The Results



Publisher delivered **86% in-target** – without over-delivery or make-goods

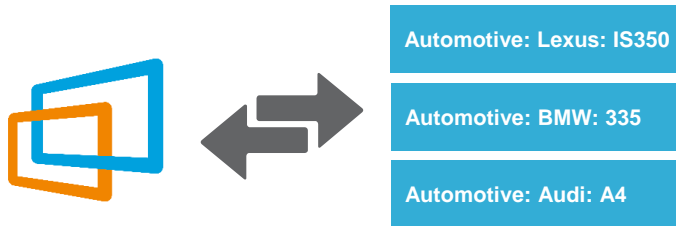
Example: Custom segments enable auto manufacturer to increase sales lift with refined targeting

The Challenge



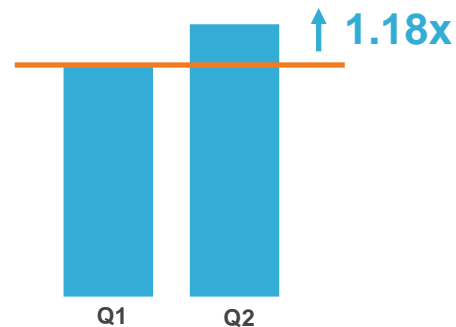
Auto manufacturer seeks to **improve targeting** with comScore custom segments

The Approach



Using proprietary behavioral insights to create **custom interest-based segments** for refined campaign targeting

The Results

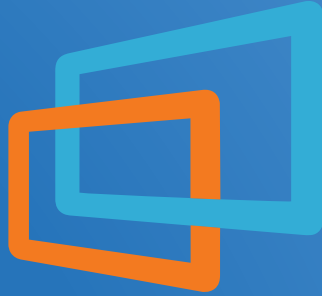


Auto Manufacturer improved **sales lift ~1.18x**, resulting in increased ROI

Integrated with Major Platforms used in the Canadian Market



...and more



Thank you!

Darrick Li

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