

From Recall to Reality

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Why Audience Measurement Must Be Grounded in Observed Behaviour

Be honest: if I asked you what you watched or listened to yesterday, how much could you recall? You would probably remember some of it. Maybe the podcast at lunch, the radio in the car, the video clip you watched on your phone, or the comedy TV show you ended the day with. But audience measurement cannot rely only on the moments we remember. It also has to capture the ones we forget, overlook, or share with someone else.

That is why the distinction between recall and passive measurement matters. Recall asks people to report what they consumed. It can reveal attitudes and motivations, but memory is selective, and reporting creates participant burden. In one simulation, self-reported and passively observed viewer counts aligned only 56% of the time, with under-reporting rising as the study progressed.

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Observation changes the starting point

Passive measurement answers questions before they are even asked. Rather than asking, "What do you remember?" it reflects "What happened?". It can draw on two complementary sources: streaming data captured directly from platforms, apps or delivery systems, and person-level exposure detected through portable or wearable measurement devices. With consent, privacy safeguards, and rigorous validation, these approaches capture behaviour as it occurs rather than asking people to reconstruct it later.

The approaches answer different questions. Surveys help explain why people chose something, how they felt or what they intend to do. Streaming data can record what was delivered or played at scale. Portable or wearable meters can connect exposure to an individual across locations and devices. Together, they give us a stronger account of what people actually watched or heard, when it happened and how it fit into their day.

Devices are not audiences

Streaming data is also a form of passive measurement. It gives us scale, speed and granularity. But let's not confuse a device with a person. A stream, app, set-top box, or connected TV can tell us a screen was active. It can't reliably tell us who was there or how many people were watching. That's why representative people panels remain essential. They connect exposure to real people, add person-level context to large datasets, and show how audiences move across platforms. Because at the end of the day, advertisers buy audiences, not devices. Co-viewing is the clearest example. One screen often means multiple viewers. If we're only counting devices, we're missing people and undervaluing shared experiences like live sports, cultural moments and family viewing.

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The future is hybrid—and accountable

But the future is not choosing what is better; it is a disciplined combination of all sources. The strongest measurement systems combine the best of every source: people panels for real and accurate human behaviour and co-viewing, streaming data for scale and granularity, and surveys for the attitudes and motivations we can't directly observe. When these sources are brought together transparently, the result is a more complete and credible picture of how audiences engage.

At Numeris, this approach is already in practice. Through solutions such as Enhanced TAM and Radio Local+, we combine representative panel measurement with large-scale datasets, including set-top box and streaming data, to create a more complete view of audience behaviour. We also use surveys and research to provide insight into the attitudes, motivations and media choices that behavioural data alone cannot explain. Looking ahead, we're exploring next-generation metering including wearables and content-recognition technologies that can further strengthen audience measurement across streaming, mobile, connected and cross-platform environments.



The goal isn't to replace one technology with another. It's to build a future ready measurement system that combines the strengths of person-level observation and large-scale datasets, while preserving the independent, representative measurement the industry depends on. Because better decisions start with a shared view of reality, not just the most available data.

Media behaviour will keep evolving. It will become more fragmented, mobile, social and personalized. Measurement must evolve with it, while keeping the objective simple: capture what is happening, connect those signals to real people, and use recall where it adds meaning, not where it substitutes for observable reality.

For me, this is more than a question of methodology or technology. As President and CEO of Numeris, I feel a responsibility to help our industry find clarity in a storm of data—to ensure that every audience is seen, that every voice is represented and that the decisions shaping Canadian media are grounded in a shared, trusted view of reality. That is the future I want Numeris to help build, and why this work matters so deeply to me.

The new Numeris is modernizing measurement to capture all audiences—and to give our industry the confidence to move forward together.