

Canada Media Fund
Digital Media Advisory Committee

Date November 21, 2017

Objectives

To update and consult with the Digital Media Advisory Committee (“DMAC”) on the following items:

- Transition from comScore Digital Analytix to Adobe Analytics tagging solutions
- Value Added vs. Rich & Substantial DM Projects
- KPI for Future DM Reports & Benchmarking

Transition from comScore Digital Analytix to Adobe Analytics tagging solutions

Overview of the Transition

Adobe Analytics purchased comScore’s Digital Analytix Technology and its contracts in November 2015, and the CMF entered into a new supplier contract with Adobe on September 30, 2016. As part of the new service agreement, all existing tags previously issued by comScore were required to migrate to the Adobe platform. While the CMF worked closely with Adobe in order to mitigate risks and ensure as smooth a transition as possible, there were unexpected challenges that arose requiring the CMF to halt and revise the tag implementation.

The original Adobe Analytics tag management solution was designed to allow the developer to insert a simple script that contains the Adobe-readable tag. The implementation of this tag management solution began in October 2016 and was rolled-out in a phased approach based on platform: web, mobile, and finally video. Tags for new projects also started to roll-out in October.

However in November 2016, it became apparent that the Adobe Analytix platform was not built to support data-capture from multiple accounts holders. Therefore, any applicant with an existing Adobe account who implemented the CMF Tag on their website would eventually see conflicts in their data.

In December 2016 applicants with exiting Adobe accounts were asked to halt implementing the CMF tag on their websites until further notice (*until an Adobe conflict-free solution was created and validated*). At the beginning of January 2017, CMF staff convened a summit in Toronto with Adobe to pinpoint the issues surrounding the inability to maintain more than one Adobe tag on a project. Due to the aforementioned technical challenges, all producers were asked to pause tagging and advised that they were not at risk of falling into default during this transition period.

Revised Tagging Solution

In March 2017, the CMF held a DMAC technical sub-committee meeting to present the framework and limitations of the proposed newly designed Adobe conflict-free solution. Volunteers were sought amongst DM Producers and Broadcasters to test the new tags and vet the new technical documentation. Post vetting, the final Adobe tagging solutions with technical guides were released to all existing applicants in August 2017.

The revised Adobe solution for websites require that CMF funded content is wrapped in an Inline Frame (“I-frame”) to ensure that only the CMF funded portion is captured in the data. This method also ensures that the CMF tag does not affect the Broadcaster’s existing measurement strategy. It is worth noting that the I-frame solution does limit the depth of data that can be captured by the CMF such as time spent. However, we recognize that the greater depth of data is more valuable to the Broadcaster or Developer since they use the data in a reactionary manner to improve individual site performance. As such the CMF does not wish to act as an impediment to broadcasters’ or developers’ own data gathering abilities.

By contrast, the CMF generally reports data in the aggregate. Therefore, page views metrics coupled with geographic and various existing out of the box filters will provide the basis for the CMF’s standardized reporting moving forward.

As for Android and iOS applications, the implementation does not allow for two or more Adobe SDK’s to co-exist. Currently, 26 of these types of projects (17% of all projects using SDKs to tag) are classified as un-taggable due to the existence of a pre-existing Adobe tag, and therefore may be required to self-report.

Note that projects that do not have the issue of an existing Adobe implementation will be required to install the CMF-Adobe SDK.

Adobe Analytics does have the capability of measuring other third party platforms that are not currently taggable due to proprietary issues (i.e. YouTube, Facebook, Steam other social media), and it is our intent to expand the scope of measurement to include these services given the increasingly large amounts of content available on these platforms. The CMF’s ultimate aim is to find a solution to automatically track content wherever it resides, rather than relying on manual self-reporting as a fallback measure.

Implementation of the Tagging Solution by Project Type

Three tracking solutions are now available for the producers and the broadcasters to track their digital media project and report on their audience to the CMF. They are all accessible under the following downloads and resources page: <https://cmf-fmc.ca/en-ca/programs-deadlines/downloads-and-resources>

- A mobile application tagging solution

The Adobe Analytics software development kit (SDK) is compatible with most of the major operating systems like iOS, Android, Cordova, Unity or Windows. The producer has to set up the context data variables with its unique appId and appName in order to successfully report on the CMF report suite.

Only one Adobe Analytics / Omniture SDK can be installed on a mobile application, the mobile native projects which have been already tagged with Adobe Analytics will have to self-report on their audience.

- A stand-alone website tagging solution

This solution is useable by all of our producers for their web based projects. This solution works through the implementation of an iFrame (Inline Frame) which is an HTML document embedded inside another HTML document on a website. This iFrame will house the CMF-Adobe Analytics code in a child-page in order to ensure there are no tagging conflicts on producer/broadcaster pages where previous implementations already exist.

The iFrame will be integrated on the page of the funded content. Each URL hosting a funded content will have to contain the iFrame with the CMF code and unique application ID.

- A bulk website tagging solution

In order to offer a more efficient solution for bigger broadcasters with a large amount of funded content, the CMF with the help of the technical team at Corus Entertainment has provided a bulk website tagging solution. Created for the producers whose projects are hosted by a third-party host, this solution is based on a master “child page” where the variables are dynamically populated according to the triggered URL of the funded content.

Identified Challenges in the new tagging solution

Despite the progress made with the new Adobe tagging solution, there still remain a number of obstacles to full implementation of which the CMF is aware. Some of these obstacles include the following:

1. Many digital media projects could not be tagged because of technical difficulties or because the project was being hosted in a third-party website. These include, Applications with and existing Adobe SDK and projects hosted on Steam, YouTube or Facebook (*which can't be tagged with the actual Adobe tagging solution*).
2. While the iframe solution solves the possibility for conflicts in the data, the CMF loses the ability to calculate the time-spent metric. It is noteworthy, that tagging video players has always been a technical challenge. Applicants with the ability to tag, have been instructed to wrap the “play button” or video URL with the I-frame as a proxy for video starts.
3. Since the tracking of a project can be superseded by the new application for funding, what happens to the tracking of previously funded content if the new application is submitted as a “Value-Added” DM?

Progress made in conversion of tags

As of November 2017, for the 7-years period of projects (2010-2017), more than 800 projects have been identified as “taggable” (projects that are fully able to implement the Adobe tag and which have not been deemed at the end of its life cycle). As the comScore DAX shutdown drew closer, CMF staff prioritised the transitioning of the top 20 digital projects (representing approximately 80% of total traffic) for conversion. As we progress towards full compliance in the transition, the CMF will work with producers to determine a satisfactory reporting method for existing projects that are unable to implement the new tagging solution.

Overall Compliance (All Projects)		2010-2017 total projects (7 fiscal years)	
		#	%
Convergent	“Taggable”	702	50%
	Identified as Self-Reporting	67	5%
	Unresponsive	50	4%
	End of life	573	41%
	Total funded	1392	
Experimental	“Taggable”	121	38%
	Identified as Self-Reporting	79	25%
	Unresponsive	22	7%
	End of life	96	30%
	Total funded	318	

Tagging status (Active Projects Only)		2010-2017 total projects (7 fiscal years)	
		#	%
Overall	Tagged	375	39%
	Not Tagged (launched)	365	38%
	Identified as Self-Reporting	146	15%
	Not Launched yet	83	8%
	Total active projects	969	

Continuity of Trending Data

The rationale behind choosing one analytics provider, previously comScore and now Adobe, was that data was more comparable across projects when using one provider as methodologies for collecting data will differ amongst different providers. With the migration to Adobe Analytics, there will be a break in the continuity of trended data as the comScore DAX platform is officially phased out. In order to ensure reporting obligations with the Department of Canadian Heritage are met, Applicants were asked not to remove their comScore tags. Both Adobe and comScore platforms continued to run in parallel until October 2017 at which point the comScore DAX platform was shut down completely.

The CMF reminds all applicants and developers that the Digital Media Measurement Framework (“DMMF”) requires each project to have an ‘active’ user function, and thus be tagged at the point of interaction triggered by the user.

Value Added vs. Rich & Substantial DM Projects

In 2016-2017 the CMF introduced a new “Value-Added” category as an alternative to the existing Rich and Substantial requirement for Convergent Digital Media projects.

Previously, DM projects were required to meet the minimum threshold of “rich and substantial” in order to be in compliance with CMF convergence requirements. Now, the minimum threshold for eligible DM components has been lowered from “rich and substantial” to “value-added”.

Tagging Requirements

Value-Added DM projects are projects are not required to tag. The budgets for these value-added projects are embedded into the same application as the Television project and as such is not assigned a separate DM application.

The CMF will continue tracking Rich and Substantial projects, defined as:

- Rich and substantial: DM Components with a budget over \$100K and \$50K (for English language productions and French (including Diverse) language productions respectively).

All rich and substantial CMF projects are assigned a unique application ID which identifies among other things, the year of funding, the CMF content type and its Telefilm application number. While the CMF does not attempt to influence the design of any project, each projects is required to tag the content specified in their CMF application at the point of user interaction with the content.

Tagging Subsequent Seasons

In some cases, subsequent CMF applications are simply the addition of new content to an existing project while in other cases, they are a wholesale updates to a previous year's application.

New applications that add content to an existing project are required to continue tagging at the content type. For example, if a game is added to an existing rich interactive media (RIM) website, only the game with its unique application ID is tagged while the existing website's application ID remains unchanged. However, if the new application is a RIM website that changes or replaces an existing RIM website, the new application ID supersedes the previous one.

KPIs for Future DM Reports & Benchmarking

In 2016, the CMF asked comScore for assistance in developing reporting tools (dashboards) to help track the progress of CMF funded digital media projects. CMF Staff were interested in examining three general considerations: 1) overall program health; 2) performance of specific categories of content against industry standards; 3) performance of individual projects against industry standards.

The initial dashboards were created, but further refinement of the reporting tool was placed on hiatus as a result of the activities surrounding the transition from comScore to Adobe. While that transition has now been completed, the CMF is awaiting a sufficient critical mass of data (both in terms of the number of projects tagged as well as traffic derived from those new tags) prior to resuming this initiative.

Using the dashboards first developed by comScore, the CMF anticipates restarting the benchmarking initiative in 2018, beginning with an examination of the data that has been generated from the new Adobe implementation and determining its applicability in the framework developed previously.

APPENDIX

Information Paper: Recent Developments, Nov. 2016 – Oct. 2017

This document lists recent industry developments in Canada and abroad; notable initiatives, partnerships and pilot projects; and research and symposia of interest to the CMF. The information relates to measurement of digital and cross-platform content, but excludes measurement of ads.

1. DEVELOPMENTS IN THE GLOBAL MEDIA MEASUREMENT INDUSTRY

Key stakeholders have launched a variety of cross-platform measurement initiatives in the past few months. Measurement leaders including Nielsen, comScore and Kantar continue to hone their measurement solutions, but so are digital giants such as Google, Facebook and Twitter (*see Section 3*). As media distribution becomes increasingly fragmented, the measurement landscape, too, is becoming more complex and competitive.

Media publishers and advertisers, however, are growing increasingly impatient, demanding greater measurement **accuracy and relevancy**, and more reliable indicators of **audience engagement**:

- In December, Facebook disclosed new measurement errors, the third such announcement in four monthsⁱ, while NBCUniversal expressed concerns over Nielsen's Total Content Ratings, calling it "incomplete and inconsistent"ⁱⁱ. Ad buyers also reported that comScore's figures were inconsistent with publishers' internal metrics, with gaps sometimes as high as threefoldⁱⁱⁱ.
- In February, both Facebook and Google agreed to an audit of their viewer metrics by the Media Ratings Council (MRC) after Procter & Gamble, the world's largest ad spender, criticized the "spotty compliance to common standards, unreliable measurement, hidden rebates and new inventions like bot and methbot fraud" currently found in the media supply chain^{iv}.
- In June, the world's largest media buyer, GroupM, also sounded the alarm bells, calling on the media industry to do more to measure total audiences as they continue to fragment across multiple screens. A GroupM executive referred to the current measurement landscape as "a mess."^v
- In August, TV industry executives voiced their dissatisfaction with the indicators currently used by both leading digital platforms and measurement firms. Fox called on stakeholders to "pay attention to 'attention' rather than pay attention to impressions," highlighting the value of "knowing, with certainty, that a human is in front of a screen."^{vi} Others argued that more detailed, standardized measurement is essential, maintaining that the age and gender data provided by Nielsen is "not an accurate or effective means to measure audience delivery."^{vii}

Such strong language and criticism is an indication that the crisis of trust is deepening—a crisis only made worse by the recent "Adpocalypse" that prompted an unprecedented backlash against Google and Facebook¹.

That crisis of trust, frustration with the measurement status quo, and concerns over the power that the likes of Google, Apple and Facebook exert over the globalized digital environment have prompted several

¹ "In March, industry heavyweights globally (AT&T, Johnson & Johnson, PepsiCo, Wal-Mart, L'Oréal, Toyota, ...) suspended digital advertising on Google's YouTube over concerns that programmatic ads were appearing on channels that broadcast offensive videos. Analysts predict the boycott will cost Google \$750 million US." Trends Report, 2017 Mid-Year Update, CMF (https://trends.cmf-fmc.ca/media/uploads/reports/Trends_Report_2017_Mid_Year_Update.pdf).

legacy media publishers to put aside their traditional rivalry—and turn to **strategic alliances amongst themselves**:

- In North America, Fox, Turner and Viacom announced in March that they were joining forces to launch OpenAP, “an advanced audience platform intended to hone audience targeting and independent measurement in an era of fractured viewing.”^{viii}
- In Europe, media publishers also announced strategic partnerships this past spring and summer, with one common goal: to better compete with the Google-Facebook duopoly in the digital ad market. German publishers Axel Springer, Gruner+Jahr and Bertelsmann Group have agreed to pool their user data from almost 1,000 sites into a single platform called Emetriq, operated by Deutsche Telekom^{ix}. In Portugal, the top six media companies will also be pooling their user data as part of Project Nonio^x. And in France, the Gravity Alliance will pool user data from its 15 members (including Lagardère, M6 and FNAC) to improve the reach and effectiveness of programmatic advertising^{xi}.

Media buyers and advertisers have largely led the charge on the audience measurement front over the past twelve months. Perhaps now more than ever, ad dollars are both the carrot and the stick moving the measurement debate forward.

2. DEVELOPMENTS IN THE CANADIAN MEDIA MEASUREMENT INDUSTRY

The paper submitted last year to the DMAC outlined two initiatives undertaken by **Numeris** to measure viewership not currently captured by legacy measurement systems, which consist of Personal People Meters (PPM) and Diaries². The following section provides an update on those initiatives, based on public presentations made by Numeris and reports filed by the CRTC-mandated Set-top Box (STB) Industry Working Group^{xii}:

- *Video Audience Measurement* (expansion of digital measurement in collaboration with a digital partner): The goal of the initiative is to measure viewing of video and original digital video from television broadcasters that is not currently encoded for PPM measurement, in partnership with a third-party vendor. In October 2017 Numeris selected Kantar Media as its technology partner to test the new system, with additional digital measurement expertise to be provided by comScore^{xiii}.
- *STB Measurement System*: Numeris and the Industry Working Group have yet to release plans and timelines for a Proof of Concept and Business Plan. Kicked off in 2015 at the request of the CRTC, the project seeks to use STB data from BDUs across the country to build a harmonized viewing dataset that can be integrated with Numeris panel data. As reported by Videonet in July, Numeris “is reviewing options that include building the system to a national, metro or local design. The choice will be determined partly by BDU return path capabilities and geography.”^{xiv}

In June, **comScore** announced the Canadian launch of its Video Metrix Multi-Platform “providing a single, unduplicated measure of digital video consumption across smartphone, tablet and desktop devices,” including enhanced mobile video reporting for YouTube and its partner channels^{xv}. No further details on the product’s Canadian rollout were found.

² Numeris has also reworked its legacy measurement systems to capture certain new forms of content consumption using its existing tools. Progressively launched in 2015 as part of its PPM Panel, Numeris’ On-Demand Viewing tool captures catch-up viewing of television content at episode level. Last year Numeris announced that it would work with broadcasters to extend On-Demand Viewing reporting to specialty television channels.

3. RECENT INITIATIVES, PARTNERSHIPS AND PILOT PROJECTS

- Over the course of the past twelve months **Nielsen** has announced a number of enhancements to its measurement solutions in the US market including: a new national television out-of-home measurement service; the addition of YouTube, Hulu and Facebook video views to its reporting; the introduction of syndicated video-on-demand content ratings from nine leading US networks to its media planning solution; and a new division to measure e-sports sponsorships^{xvi}. In February, Nielsen's Digital in TV Ratings (for programming viewed on computers and mobile devices) was the first solution to receive accreditation from the MRC for the inclusion of digital measurement in TV ratings^{xvii}.
- In September, Nielsen filed a lawsuit against **comScore** in the US, seeking an injunction to prevent the launch of its rival's Extended TV service, which according to Nielsen incorporates its proprietary PPM data^{xviii}. Competition between Nielsen and comScore has been fierce, with the latter announcing its own set of enhancements to measurement solutions in recent months including: the addition of mobile video metrics (including smartphone and tablet viewing on apps and the mobile web) for YouTube Partner Channels; the development of new measurement for over-the-top viewership on TV-connected devices (including STBs, streaming sticks, gaming consoles and smart TVs)^{xix}. And comScore, too, received a nod from the MRC: it received accreditation from the US industry body for its Sophisticated Invalid Traffic Detection, which filters out fraudulent mobile and web traffic^{xx}.
- In the past few months Nielsen, comScore and Kantar have also announced a series of initiatives and enhancements targeted at ad measurement (*not covered in this paper*), a sub-sector of the measurement industry where they are both collaborating *and* competing with **digital platforms Google and Facebook**, in particular. Of particular interest this year is how these platforms have begun to change their qualitative approach to audience measurement, echoing advertisers' call for a greater focus on audience attention and engagement. Facebook, for example, is shifting away from the Total Installs app metric, emphasizing indicators of conversion and action-taking instead^{xxi}. And in the gaming market, Google announced that it would now consider user engagement, not just downloads, in its game rankings^{xxii}.

4. MEASUREMENT RESEARCH AND SYMPOSIA

In keeping with the issues and challenges addressed above, the FreeWheel Council for Premium Video Europe (FWCE)³ released a paper in September calling on industry stakeholders to “consider the wider performance picture” when it comes to online video measurement^{xxiii}. The paper notes that the lack of consistency in defining video views is causing discord between stakeholders, and that viewability guidelines and metrics need to be revamped to meet the needs of publishers and advertisers. The paper also highlights four key differentiators for premium video environments: high engagement, strong conversions, brand safety, and “ripple effects” (amplification of impact on other channels).

³ “The FreeWheel Council for Premium Video Europe (FWCE) was formed in June 2017 to serve the interest of those in the premium video industry through leadership positions, research and advocacy. (...) The FWCE at launch consists of 14 members: Canal+ Régie, Channel 4, Discovery Networks International, France Télévision Publicité, Mediaaan, MTG, Nelonen, Proximus, RTÉ, SBS Broadcasting, SFR Régie, Sky Media UK, Sky Media Germany and TF1 Publicité.” FreeWheel, *Defining a View: The Impact of Evolving Video Dynamics*, Sept. 2017.

-
- ⁱ <http://marketingland.com/facebook-discloses-new-measurement-errors-continues-hone-math-200416>;
<http://digiday.com/platforms/facebook-twitter-stumble-measurement-snapchat-scores-brownie-points/>
- ⁱⁱ <http://www.wsj.com/articles/nbcu-says-new-nielsen-measurement-product-not-ready-for-release-1481830416>;
<http://variety.com/2017/tv/news/nielsen-measurement-total-content-tv-advertising-1201953370/>
- ⁱⁱⁱ <http://digiday.com/agencies/cant-optimized-agency-buyers-see-comscores-value-diminishing/>
- ^{iv} <http://www.fiercecable.com/online-video/google-submits-youtube-to-media-ratings-council-audit>;
<https://www.wsj.com/articles/google-agrees-to-youtube-metrics-audit-to-ease-advertisers-concerns-1487678403?tesla=y>
- ^v <http://v-net.tv/2017/06/01/groupm-sounds-warning-on-audience-measurement/>
- ^{vi} <http://v-net.tv/2017/07/27/broadcasters-need-to-get-out-of-the-impressions-business-and-back-into-the-attention-business/>
- ^{vii} <https://digiday.com/marketing/programmatic-will-change-tv-measurement/>
- ^{viii} <http://www.hollywoodreporter.com/news/fox-turner-viacom-join-forces-new-audience-measurement-platform-986430>
- ^{ix} <https://digiday.com/uk/german-publishers-pool-data-compete-google-facebook/>
- ^x <https://digiday.com/media/portugals-media-companies-alliance/>
- ^{xi} <https://www.lesechos.fr/tech-medias/medias/030427903333-publicite-les-medias-francais-allies-pour-mieux-contrer-les-gafa-2099852.php#LpsVsK7eFyldHWri.99>; <https://www.emarketer.com/Article/Frances-New-Digital-Publisher-Partnership-Takes-on-Digital-Ad-Duopoly/1016130?ecid=NL1001>
- ^{xii} <https://www.youtube.com/watch?v=HQhnUtcFyhk>; <http://cimm-us.org/wp-content/uploads/2012/07/INNOVATION-IN-CANADA-Complete-Video-Audience-Measurement-and-Exploring-combining-Return-Path-Data-with-TAM-Panel-Data-Numeris.pdf>;
http://www.merx.com/English/Supplier_menu.asp?WCE=Show&TAB=3&PORTAL=MERX&State=7&id=PR384582&HID=&src=nm&searchtype=&hcode=iLp7YdSgfsGBGGZmGW3yg%3D%3D; <http://crtc.gc.ca/eng/archive/2017/2017-160rdc.htm>
- ^{xiii} <https://cartt.ca/article/numeris-tests-cross-platform-audience-measurement-canada>
- ^{xiv} <http://www.v-net.tv/2017/07/27/after-the-current-design-phase-canada-must-prove-the-commercial-viability-of-its-shared-stb-audience-measurement-system/>
- ^{xv} <http://www.comscore.com/Insights/Press-Releases/2017/6/comScore-Announces-Canada-Launch-of-Video-Matrix-Multi-Platform>
- ^{xvi} <http://www.adweek.com/news/television/nielsen-will-measure-tv-viewing-places-bars-hotels-gyms-and-office-174238>;
<https://techcrunch.com/2017/07/25/nielsen-hulu-youtube/?ncid=rss>; <http://advanced-television.com/2017/08/15/nielsen-to-credit-facebook-hulu-youtube-views/>; <http://advanced-television.com/2017/07/21/vod-ratings-added-to-nielsen-media-planning-solution/>; <https://techcrunch.com/2017/08/17/nielsen-esports/?ncid=rss>
- ^{xvii} <http://advanced-television.com/2017/02/08/nielsen-mrc-accreditation-of-digital-in-tv-ratings/>;
<http://www.prnewswire.com/news-releases/nielsen-announces-mrc-accreditation-of-digital-in-tv-ratings-300403177.html?>
- ^{xviii} <http://advanced-television.com/2017/09/25/nielsen-sues-comscore-over-ratings-launch/>
- ^{xix} <http://www.tubefilter.com/2017/02/24/comscore-mobile-viewership-stats-youtube-partners/>;
<http://www.fiercecable.com/online-video/comscore-to-offer-viewership-numbers-for-netflix-amazon-hulu>; <http://advanced-television.com/2017/05/11/new-ott-measurement-from-comscore/>
- ^{xx} <http://www.fiercecable.com/online-video/comscore-tvision-aim-to-set-audience-measurement-course>
- ^{xxi} <https://venturebeat.com/2017/04/17/facebook-no-longer-measures-total-app-installs-because-developers-dont-care/>
- ^{xxii} <https://techcrunch.com/2017/02/28/google-play-now-considers-user-engagement-not-just-downloads-in-ranking-games/?ncid=rss>
- ^{xxiii} <http://freewheel.tv/fw-council/#freewheel-council-positions>; <https://digitalmediasales.rte.ie/news/defining-a-view-the-impact-of-evolving-video-dynamics-freewheel/>