CANADA MEDIA FUND

Digital Media Advisory Committee

Date: October 15, 2015

Objectives

To update and consult with the Digital Media Advisory Committee on the following items:

- Progress report on the number of CMF-funded projects reporting
- Creation of DM technical subcommittee (May 2015)
- Implementation of tagging protocol (intelligence tags, video, experimental)
- Benchmarks and reporting of KPIs in aggregate
- Definitional issues surrounding DMMF classifications
- Progress on measurement of experimental projects
- Information Paper: recent developments on measurement approaches

Progress Report on Projects Reporting

The CMF is continuing to pursue the goal of full compliance for digital media reporting through enforcement of the comScore tagging requirement for digital media projects. As of September 2015, 63% of Convergent and 56% of Experimental projects have been tagged (all CMF-financed projects dating back to 2010).

Note that while a project may be funded in a particular fiscal year, it may take a number of years before the project is completed and released to market. As such, compliance tends to be higher for projects listed in previous funding years. This reality is illustrated in the table below, where projects from 2010-2011 and 2011-2012 have achieved higher levels of compliance than projects from 2014-2015.

**Digital Media - Total Number of Production Projects Reporting
(as of Sept 3, 2015)**

	2010-2015 total projects		2014-2015 projects		2013-2014 projects		2012-2013 projects		2011-2012 projects		2010-2011 projects	
Convergent	612	63%	43	19%	147	69%	181	81%	145	82%	96	79%
Experimental	116	56%	10	21%	22	63%	24	62%	29	64%	31	74%

Creation of DM technical subcommittee (May 2015)

In the interests of discussing in greater detail the purely technical aspects of the CMF's digital media measurement strategy (as opposed to the policy aspects which would still be discussed at the annual meeting of the Digital Media Advisory Committee), the CMF felt that it would be useful to create a digital media technical subcommittee. This sub-committee would be comprised of industry representatives and representative stakeholders who had specific technical expertise in the digital media sphere.

The CMF convened the first meeting of the digital sub-committee on May 29th 2015, where the main topics covered were the implementation of the CMF smart-code, event-based tagging (including the various challenges surrounding video tagging), and the use of a CMF online form to validate tags. Specific issues raised in the meeting will be discussed in the sections that follow.

Implementation of tagging protocol (intelligence tags, video, experimental)

Event-based tagging: Additional tagging requirements
Since last year's DM Advisory Committee Meeting, there have been proposals for collecting event-based user interactivity. Event-based tags provide an additional layer of context when collecting quantitative data such as visits (sessions) and time spent.

Moving to event-based tagging improves the ability to track the specific elements that have been financed by the CMF, and provides for a more granular dataset that is better aligned with the DMMF itself. For example, event-based tagging allows the CMF to track whether content types such as games and videos have actually been played, and the specific time spent with these elements.

What is event-based tagging?
Event-based tagging records user interaction such as play and stop events for both web and mobile app elements. From a technical perspective, developers must integrate the "cmf_ev" label to their interactive content in order for comScore to collect event-based user activity within the comScore Digital Analytics Interface.

Event tracking can be applied to the following:
- games (flash-driven elements for example)
- video players
- pages
- file downloads

In an effort to 1) align the data collected with the DMMF; 2) verify the content type; and 3) increase reporting compliance, the CMF has implemented the following procedures:

- Removed the comScore technical documentation from the website so that producers are no longer able to tag their projects without first contacting the CMF for direction.

- Created a more robust verification process by;
  - creating an online form that producers use to request the tags
  - verifying and providing tagging specific to the DM financed event
  - adding the intelligence code to the tagging script;
    - to confirm the code requested matched the content that had been produced
    - to provide a more focused comparison of data beyond and in addition to the application numbers
    - to easily pivot and report on the data collected numerically.
- Developed a system to inform the CMF when projects are tagged for compliance purposes.

The CMF intends to focus implementation of this event-based tagging protocol on all new projects (i.e. on a go-forward basis), and has no plans at this time to retroactively convert / re-tag projects financed in previous years.

Benchmarks and reporting of aggregated KPIs

As part of our commitment to our external stakeholders and Canadian Heritage, the CMF has reported on DM performance through KPIs such as number of sessions, unique visitors, and average duration per visit. However, our capacity to analyze and provide context to these results has thus far been limited.

comScore, the CMF's digital analytics service provider, has extensive experience examining industry best practices for contextualizing digital media metrics. We have therefore started discussions with comScore for assistance in developing dashboards that will better inform our stakeholders on the performance of CMF-financed DM projects. It should be noted that this initial iteration of dashboards or benchmarks is intended for reporting in aggregate (i.e. by language and genre, and not by individual project). The aim is to have preliminary dashboards and benchmarks developed by the end of Q4 (March 31, 2016).

Definitional issues surrounding DMMF classifications – "rich interactive" vs other content types

The CMF Research group has discovered that the classifications of DM projects can vary, especially in regards to rich interactive media projects delivered via website. The rich interactive content type has evolved into a catch-all classification. There needs to be further clarification of the term "rich interactive" content type, as the classifications are self-declared and more often tied to the budget allocation requested by the producer, rather than the intended definitions found in the DMMF.

Immersive vs Non –Immersive
There are currently two categories of projects applying for CMF-DM funding as a rich interactive content type.

The first is an immersive experience with multiple content types imbedded, allowing the user to navigate through various paths to complete the project, (similar to a gamified experience void of scores).

The second tends to be a website which may include more than one CMF-eligible content type. Typically this can also include multiple pieces of unfunded content (which can be updated on an ad-hoc basis). In some cases, the various content types do not even reside on the same website. The CMF is starting to see more of these projects in the system.

The Current Process
Typically, a producer completes the CMF–DM application before the production of the DM project has started. The application data reflects CMF-DM projects as selected on the e-telefilm application form where the content type classification is open to the producer's interpretation and is only vetted by Telefilm for funding eligibility.

Here is a basic example:

Scenario:
A producer applies for $10,000 to finance a web based DM project. They intend to create short videos, include social media and download links to their content. Thanks to the video element, the DM projects has already met the rich & substantial criterion in the CMF guidelines and according to the DMMF, the other elements qualify for financing.

A) Could the producer apply for $10,000 inclusively as a rich interactive content type?

or

B) Could the producer apply for $6,000 for video, $2,500 for social media and $1,500 for download content as individual content types or combine them and classify the project as rich interactive?

This decision matters because at the e-telefilm applications stage, the producer has to choose the appropriate content type (one budget equals one application number and one content type in the system).

If a producer chooses to apply for content as seen in scenario B, three applications numbers are generated (representing three separate budgets), the three content types are listed in the system as separate DM projects, and three individual event tags are issued. If the producer chooses scenario A, only one application number is generated, and only on event tag is issued.

Measurement Challenges
Though the CMF has moved to event based "content type" tagging, the rich interactive media tag captures traffic to the entire website, intended for projects that embody a full-immersive experience. These tags capture traffic to the entire site, as opposed to a specific event.

The CMF has noticed an uptick in "catch-all" projects that do not exactly fall into our definition of full-immersive, yet are still tagged as rich interactive rather than by individual content type. This has created challenges in our ability to analyse the data as the usage patterns for some the "catch-all" projects (typically multiple events with high level of user interaction embedded in its design) can be several times higher than truly rich interactive projects, skewing the resulting data for the category.

Interpretations of Rich Interactive Media
Below is a breakdown of the types of DM projects that are currently being classified under the rich interactive media content type (and therefore tagged at the top of the site as opposed to at the event-level):

1. A single website with multiple elements that work together to create a fully-immersive user experience.
2. A single website with one eligible content type (game, video, etc.) paired with an ineligible content type (or multiple ineligible content types).
3. A single website with two or more eligible content types.
4. Multiple eligible content types located on separate websites/domains *(also relevant to the Social Media content type)*.

The CMF is seeking clarification on which of the examples listed above should truly be classified as "rich interactive media". Based on that determination, a process can be developed to ensure more accurate measurement and comparative reporting against content types.

Progress on Experimental measurement

The CMF continues to examine ways to improve the level of reporting compliance in experimental projects. The low levels of tagging to date are partly a function of experimental projects taking much longer to go into production than convergent DM projects. Another issue impacting compliance is that comScore tags cannot be applied to certain types of experimental projects, thus requiring an alternate analytical tool to measure usage.

CMF-funded Projects that currently cannot be tagged with comScore
- YouTube videos/channels
- SMS texting
- Projects that are only collecting licenses (typically subscription based)
- Social media apps for channels such as Facebook, collecting qualitative data

- Game consoles where restrictions apply including limitations on tagging of hardware or 3rd party servers where tagging restriction policies may also apply
- Other convergent and experimental projects including content that is not designed with technology or more specifically, a server connection (example: variety and performance Art installations)
- Content with offline server connections.
  - Note: http request solution may currently not be a viable option for CMF-funded projects that allow users to engage with offline content. However, comScore SDKS does support offline activity after a server connection has been re-established.

One scenario being examined is the use of alternate tagging solutions which can exist in parallel with the comScore reporting tool. For example, some experimental game projects are now being tagged using cross-platform technologies like Unity 3D and Cordova, and the usage data can be successfully integrated into the comScore reporting tool.

Appendix A

The tables below highlights **DM-A**, a "Catch –All" project currently classified as a Rich Interactive Media DM in the convergent stream.

Rich Interactive Media - Website Projects Only:

Rank	Project Genre	Project Title	Delivery Method	Content Type	Sessions	UVs	Page views	Average Duration (Mins.)
1	**Documentary**	**DM - A**	**Website**	**Rich inter. media**	**574,023**	**479,006**	**1,044,637**	**0:01:15**
2	Children & Youth	DM - B	Website	Rich inter. media	13,718	10,613	354,051	0:02:42
3	Documentary	DM - C	Website	Rich inter. media	12,307	10,629	31,765	0:02:29
4	Children & Youth	DM - D	Website	Rich inter. media	11,783	8,206	56,539	0:06:57
5	Children & Youth	DM - E	Website	Rich inter. media	9,777	6,923	24,070	0:03:07
6	Children & Youth	DM - F	Website	Rich inter. media	8,532	6,440	120,474	0:06:11
7	Drama	DM - G	Website	Rich inter. media	7,956	6,931	20,524	0:02:04
8	Documentary	DM - H	Website	Rich inter. media	7,622	4,850	11,757	0:01:41
9	Drama	DM - I	Website	Rich inter. media	7,202	3,693	15,730	0:13:54
10	Children & Youth	DM - J	Website	Rich inter. media	6,439	4,056	41,976	0:06:14

Top DM List - All Delivery Methods & Content Types:

Rank	Project Genre	Project Title	Delivery Method	Content Type	Sessions	UVs	Page views	Average Duration (Mins.)
1	**Documentary**	**DM - A**	**Website**	**Rich inter. media**	**574,023**	**479,006**	**1,044,637**	**0:01:15**
2	Children & Youth	DM - B	Application	Game	67,868	23,599	524,593	0:08:06
3	Children & Youth	DM - C	Website	Game	54,822	17,217	156,427	0:03:55
4	Drama	DM - D	Website	Video	31,412	24,693	71,338	0:01:51
5	Children & Youth	DM - E	Website	Game	27,837	18,433	51,453	0:02:18
6	Drama	DM - F	Website	Video	25,959	14,972	123,173	0:09:16
7	Children & Youth	DM - G	Website	Game	22,443	14,851	707,346	0:13:11
8	Drama	DM - H	Website	Video	18,828	14,365	34,835	0:03:32
9	Drama	DM - I	Website	Game	14,548	11,899	44,299	0:03:46
10	Children & Youth	DM - J	Website	Game	13,802	9,530	36,037	0:07:13

Appendix B

Digital Media Measurement Framework
Information Paper: Recent Developments

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-media content, but excludes advertising-specific measurement.

1. DEVELOPMENTS IN THE GLOBAL MEDIA MEASUREMENT INDUSTRY

In a 2015 report, analyst Tom Eagan of Telsey Advisory Group laid out the case for 2016 as the Year of Measurement[i]. A growing number of companies are claiming to provide full measurement solutions:

- **Rentrak** has gained a lot of traction in recent few years with its set-top based measurement and has landed deals with several broadcasters and ad buyers.

- With new products like MMX Multi-Platform, MMX Mobile and vCE, **comScore** has been at the forefront of multi-platform measurement. In April 2015, comScore, in collaboration with the Coalition for Innovative Media Measurement (CIMM), unveiled the first set of cross-media measurement data for 11 CIMM member companies through its cross-media measurement service: A&E, CBS, Disney ABC, ESPN, Fox, NBC Universal, Scripps, Univision, and Viacom[ii].

- **Nielsen** has been criticized by content providers for the lack of a new measurement currency, among other things[1], but it has introduced several initiatives recently. Nielsen Global President Steve Hasker: 'We can measure live and time-shifted TV. We can measure ad-supported VOD and we can measure mobile viewing of video ads. The pieces that we are in the process of adding are, firstly, over-the-top viewing (…). The second is the launch in September of the Digital Content Ratings, in partnership with Adobe. That will measure not only ad viewership, but viewership of the program.'[iii] In recent months, Nielsen has also been scaling up a program to track viewing on Netflix and other online services like Amazon's Prime Instant Video and Hulu[iv].

A move towards **stricter protection and privacy rules** could affect data collection in years to come:

- The European Union has taken big steps toward adopting a single set of privacy regulations that could drastically alter the operations of thousands of companies. If adopted, the rules would mean a standardized protocol for handling personal data inside Europe that's far more stringent than anything in the US or Canada[v].

- The World Wide Web Consortium unveiled proposed Do-Not-Track compliance standards. They call for ad networks and other companies to stop collecting data from users who have turned on the do-not-track signals, except for auditing, security, debugging and frequency capping purposes[vi].

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[1] Nielsen has also been criticized by TV networks for its controversial National Panel Expansion Plan, which seeks to expand part of its TV ratings sample by mathematically modeling viewing behavior to represent the viewing of people not participating in the sample (http://www.mediapost.com/publications/article/253209/tv-nets-rally-fail-to-reach-consensus-on-controve.html).

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2. DEVELOPMENTS IN THE CANADIAN MEDIA MEASUREMENT INDUSTRY

In September 2014, **Numeris** (formerly BBM Canada) and Rentrak presented their take on bringing **set-top box (STB) measurement** to Canada in the context of the CRTC's Let's Talk TV hearings[vii]. Numeris indicated it would be possible to add STB measurement to existing Portable People Meter (PPM) and Diary data, estimating it would take between 18 and 24 months to get a new STB system off the ground. Numeris had previously conducted a **test on STB video-on-demand** (March to June 2014) on behalf of the Television Bureau of Canada (TVB) and the Canadian Media Directors' Council (CMDC); a report on that test is available on the TVB's website[viii].

In August 2015, Lisa Eaton, Vice-President of Member Engagement at Numeris, outlined the major milestones of the company's strategic **Product Roadmap**, including its newly developed non-linear measurement service entitled **On Demand Measurement (ODM)**[ix]:

- Testing of new approaches to build the Numeris sample using telephone and online techniques.

- Work to begin this fall on: the development of the Online TV Diary; the modifying of diary incentives (to encourage more 18-34s to participate); and time block reporting of Netflix activity in the TV Diary Service.

- Commercialization of the PPM Service's Cross Media Radio and TV pilot database in the fall.

- In line with the ODM's initial focus on the creation of a digital cable VOD measurement system, Numeris will begin reporting, on a monthly basis, all VOD viewing captured from participating conventional broadcasters this fall.

- Like other measurement companies, Numeris is investigating a hybrid strategy to measure broadcast audiences on every platform. That entails integrating the audience data with census-type machine-based data (also called STB [Set Top Box] or RPD [Return Path Data]).

  Numeris will be conducting a small scale pilot test in one market, likely Toronto, to assess the feasibility of collecting and integrating STB data from multiple Broadcast Distribution Undertakings. Numeris will also be looking at how to integrate the STB viewing data into the Numeris currency.

- A newly created Innovation Lab is exploring the development of alternative devices that could be used to measure audiences. Such devices include wearables and a smartphone notification app for diary keepers. The Lab is also testing the use of smartphones as meters.

3. RECENT INITIATIVES, PARTNERSHIPS AND PILOT PROJECTS

a. comScore Introduces Syndicated Product to Combine TV and Digital Audience Metrics
September 2015[x]

- In the US **comScore** has launched Xmedia, which measures content consumption across all digital platforms and TV in a single tool. This syndicated measurement solution allows users to create cross-media packages that combine properties from TV and digital to analyze **unduplicated, incremental and overlapped audience reach and engagement across platforms**.

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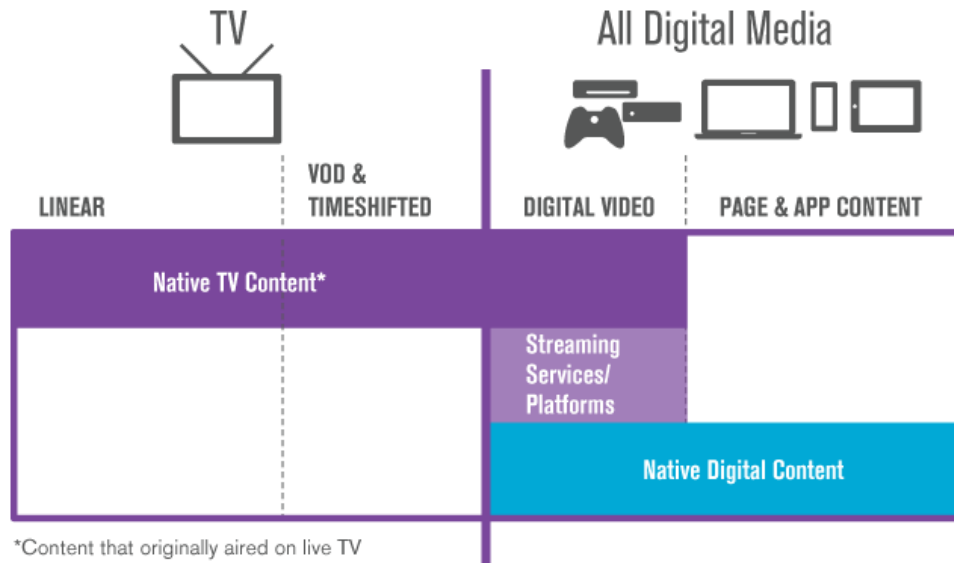
Source: comScore

- **comScore** and **Kantar Media** have introduced their first joint offering for cross-media audience measurement to key clients. This is the first outcome of the Kantar and comScore strategic alliance announced in February 2015 to provide world class cross-media audience and campaign measurement capabilities to markets around the world[xii].

- Both companies have defined a roadmap together that addresses a range of reporting scopes and the options of available measurement assets and techniques, including **panels**, **meters**, **tagging**, **home routers**, **return path data** and **census profiles**.

- There has been significant interest in the partnership from clients and industry committees around the world. Based on this feedback, **Spain** has been identified as the pilot market with initial findings expected later in 2015, and other markets to follow.

- The defined scopes of reporting for an integrated measurement approach in addition to core broadcast TV include:

  - **Extended TV** - content broadcast in simulcast or on-demand on smartphones, tablets desktops and OTT devices.

  - **Total Video** - all video content from online platforms whether broadcast video or not, such as YouTube.

  - **Total View** - all online content whether video or text based, accessed via a browser or app, on smartphones, tablets desktops and OTT devices.

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- comScore and Kantar Media have developed an **integrated tagging approach for web, video, and application measurement**, allowing seamless data sharing with explicit client permission but without requiring duplication of implementations. Both companies will continue to support any tagging deployments under existing contracts. The option to move to an integrated approach would be a decision for the relevant joint industry committee or user group.

c. Beta launch of BARB's TV Player Report
July 2015[xiii]

- The **UK's Broadcasters' Audience Research Board** (BARB) announced that the beta version of the TV Player Report is to be released in September, providing official figures on the level of **viewing to on-demand and live-streamed content through online TV Player apps**.

- The TV Player Report is the first set of BARB data to focus on viewing that takes place on computer devices such as laptops, desktops, tablets and smartphones. It reports on **viewing activity at a device level, rather than a person level**, and relies on **data that are generated from software code** that has been developed by **Kantar Media** and implemented by broadcasters.

- This solution is one of the most advanced audience measurement systems for online TV viewing in the world. These data will be an important building block for the delivery of **Project Dovetail**, the **hybrid measurement system** that will harness the power of **BARB panel data and device-based data**.

- The first weekly report was launched in September[xiv].

d. Germany to integrate YouTube in TV ratings system
April 2015[xv]

- AGF, the German association providing the official TV audience ratings, now **includes online video consumption at YouTube in its reach figures**. The target of this world-first integration is to provide convergent TV and online video usage figures including YouTube and other online video platforms, according to AGF. The German advertisers organisation OWM had pushed towards the establishment of a unified cross-media standard for media consumption measurement.

- The online video usage will be monitored by collecting **data from an online panel operated by Nielsen and GfK's cross media panel**.

- Sample reports available (in German)[xvi].

e. MDA appoints GfK to build new national Audience Measurement system
May 2015[xvii]

- The Media Development Authority of Singapore (MDA) has commissioned **GfK** to provide the new Singapore Television Audience Measurement (SG-TAM) system. With SG-TAM, broadcasters, producers and advertisers will now have access to **audience consumption data across a full range of linear and non-linear media platforms** -- free-to-air (FTA) TV, pay TV channels, OTT streaming platforms, online and mobile channels.

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- MDA expects data from SG-TAM to be ready in the second half of 2016, and will make it available to broadcasters, platform owners, content producers, advertisers, and public stakeholders.

- The agreement with GfK is valid for three years, with an option to extend for another two.

- MDA is a statutory board under the Ministry of Communications and Information. It promotes the growth of globally competitive film, television, radio, publishing, games, animation and interactive digital media industries. It also regulates the media sector.

4. MEASUREMENT RESEARCH AND SYMPOSIA

International Symposium on the Measurement of Digitized Cultural Products
HEC Montréal, Montreal, May 9-11, 2016

- Organizers: Observatoire de la culture et des communications du Québec and UNESCO Institute for Statistics. Supported financially by CMF.

- Purpose: To organize an international symposium bringing together experts in statistics and researchers from around the world in order to examine issues, methods, practices and innovations surrounding the production of statistics on digitized cultural products.

- Objectives include:

  - Examine the means that make it possible to provide reliable and relevant statistics.
  - Document best practices.
  - Identify new indicators and promising means for producing statistics.
  - Contribute to the establishment of standards, rules and international norms.
  - Meet the expectations of market players by taking into account the political, legal and regulatory environment of data holders.

- The proceedings will be published in English and in French (fall 2016).

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[i] http://www.multichannel.com/blog/money/2016-critical-year-measurement/392644

[ii] http://cimm-us.org/comscore-in-collaboration-with-cimm-unveils-first-look-at-cross-media-measurement-data-for-11-cimm-member-companies/

[iii] http://blogs.wsj.com/cmo/2015/05/15/nielsen-explains-how-its-adapting-to-the-rise-of-online-video/

[iv] http://www.wsj.com/articles/netflix-viewership-finally-gets-a-yardstick-1440630513?cb=logged0.21438336092978716

[v] http://www.fastcompany.com/3047454/fast-feed/european-union-one-step-closer-to-adopting-stricter-data-privacy-rules?partner=rss

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vi http://www.w3.org/blog/news/archives/4814

vii http://mediaincanada.com/2014/09/16/measurement-takes-centre-stage-at-crtc-lets-talk/

viii http://www.tvb.ca/page_files/pdf/vod.pdf

ix http://www.broadcastdialogue.com/Admin/pdf/tech/Story%202015-08-20_The%20Numeris%20road%20map_Eaton.pdf

x http://www.comscore.com/Insights/Press-Releases/2015/9/comScore-Introduces-FirstEver-Syndicated-Product-to-Combine-TV-and-Digital-Audience-Metrics; http://www.comscore.com/Products/Audience-Analytics/Cross-Media#resources

xi http://www.comscore.com/Insights/Press-Releases/2015/4/Kantar-Media-and-comScore-Announce-First-Joint-Offering-for-Cross-Media-Audience-Measurement

xii http://www.comscore.com/Insights/Press-Releases/2015/2/comScore-and-Kantar-Announce-Strategic-Global-Partnership

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xv http://www.broadbandtvnews.com/2015/04/27/germany-to-integrate-youtube-in-tv-ratings-system/

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xvii http://www.mda.gov.sg/AboutMDA/NewsReleasesSpeechesAndAnnouncements/Pages/NewsDetail.aspx?news=665