

CANADA MEDIA FUND
Digital Media Advisory Committee (DMAC)
November 5th 2018

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

- Overview of changes since last meeting
- Measurement Challenges
- Compliance Report
- Proposed changes to the existing Digital Media Measurement Framework
- Convergence – The Second Platform

Background

The Canada Media Fund (“CMF”) entered into a new agreement with Adobe Analytics to become our preferred supplier for digital media tracking on 30 September 2016. In order to continue measuring traffic on CMF-financed projects, additional tags were required to be installed in order for CMF funded projects to be compatible with the Adobe platform. Simultaneously, Telefilm (CMF Program Administrator “CMFPA”) and the CMF were also converting to Dialogue, an online tool used to process CMF Applications.

During this time, the CMF suspended the use of the previous tag request forms and the default process. Instead, all existing applicants were contacted in a methodical and precise manner with the instructions on how to implement the new CMF-Adobe tags.

Applicants were reminded that, in order to remain in compliance with their contractual obligations to the CMF, they must install CMF issued tags and were informed that existing Digital Media (“DM”) projects would not be placed in default during this transition period.

Only rich and substantial digital media projects funded in the “production” program are governed under the existing Digital Media Measurement Framework (“DMMF”) and are required to provide measurement metrics to the CMF. Convergent Stream Value-Added DM production projects are not required to tag. Projects that apply for Value-Added funding are embedded into the same application as the Television project and are not assigned a separate DM application number.

The CMF is cognizant that, externally, the industry relies on CMF metrics to gain insight into market trends. Further, due to the wide-ranging impacts its policy decisions have on Canada’s screen-based industries, the CMF relies on these metrics to ensure that such decisions are data-driven.

Measurement Objectives

The CMF Guidelines and DMMF are meant to qualify applications and provide structure for measurement purposes. However, the CMF is acutely aware that all projects are not created equally and despite the myriad of new platforms and services that emerge each day, the CMF strives not to hinder the creativity of funded projects.

As such, each project's architecture, content, distribution platforms and internal measurement providers are determined by the project's applicant.

The Contribution Agreement between the CMF and the Department of Canadian Heritage ("DCH") requires that projects funded by the CMF meet minimum thresholds of pre-determined metrics in the aggregate. As the purpose for measurement from the Fund's perspective is reporting and not that of a reactive Curator, the CMF has chosen to forfeit tagging for the purpose of deep insights, in favor of the applicant and curators. As such, the Fund has adopted an "iframe" proxy tagging strategy, when possible, allowing the CMF to report on basic metrics in the aggregate.

The CMF is cognizant that a balanced approach must be taken to measure all funded production DM projects as we report to our stakeholders.

Requesting a CMF Tag

Since the CMF is a neutral, independent funding organization striving for transparency, every effort is made to ensure that the statistics it compiles in connection with its funded Television and DM Components are current, effective and most importantly, accurate.

In May 2017, the CMF re-launched the online tagging request form along with an extension request form on its website. The webpage housing these forms contains the complete list of reporting obligations for Rich and Substantial DM projects. Steps were taken to ensure the definitions of DM delivery methods and content types are located not only at the beginning of the application process, but also through to the tagging request stage.

All Rich and Substantial CMF DM projects are assigned a unique application ID number once a request for tagging is received. This custom ID is the primary attribute embedded in the CMF-Adobe tag and must be installed accurately for the data to populate in the CMF-Adobe reporting suites. Validation of the tags are is integral step in the tagging process.

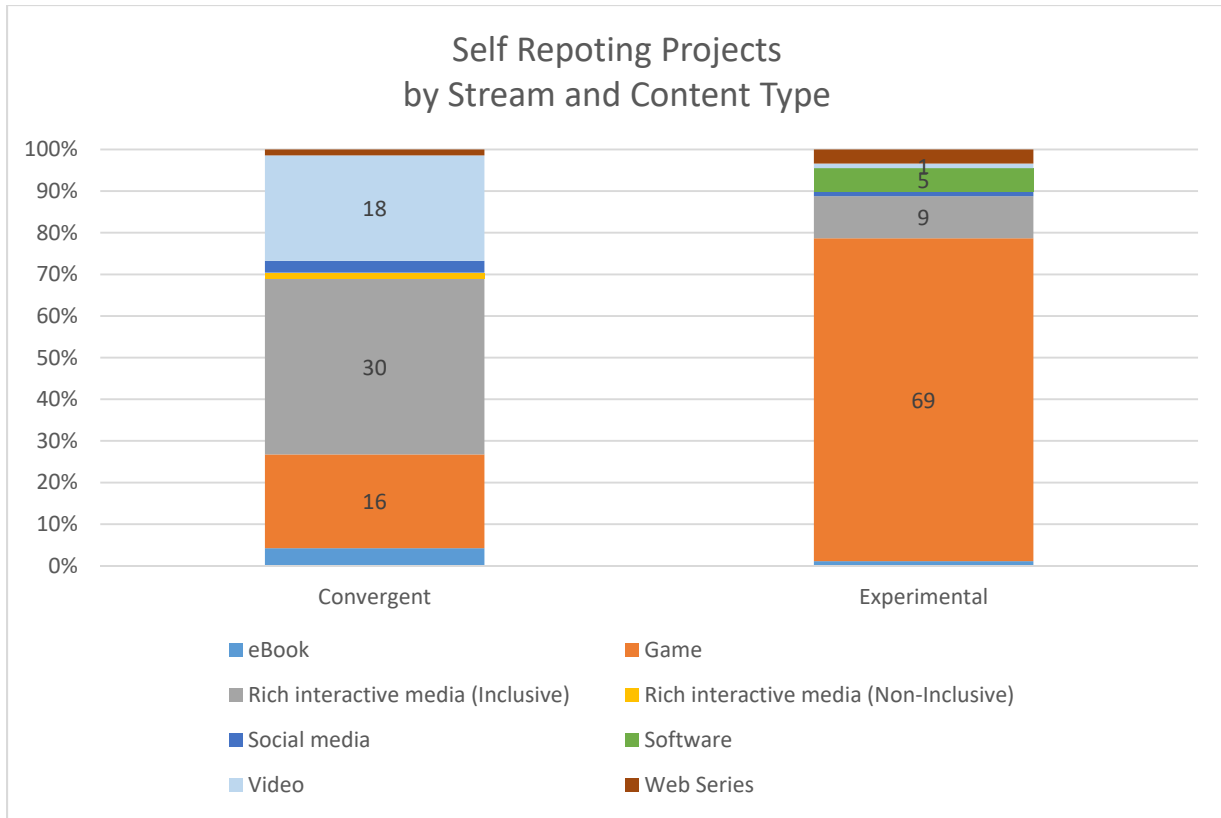
Applicants are now also required to indicate that they have read and understand the obligations prior to requesting the tag. As such, all tagging of DM components must comply with section 11.0 of the Applicant DM Production Agreement (or the analogous iteration of this language in Production Agreements from earlier years), and paragraph 2 of the Broadcaster Applicant Declaration in the DM Broadcaster Agreement Form. By complying with these provisions, applicants and broadcasters can help the CMF gather accurate market-intelligence that will benefit both individual stakeholders and the industry at large.

Measurement Challenges & Self Reporting

While the "iframe" proxy provides basic metrics such as number of visits, sessions, visitors, user demographics, device type and the like, it limits the CMF's ability to capture any time spent metrics.

Not all projects are able to implement the iframe proxy. Some notable examples are videos hosted on YouTube, Vimeo, Facebook and similar platforms. Games hosted on third-party platforms or consoles such as: Steam, Nintendo 3DS, Xbox, PS4, Xbox One and apps that have been previously tagged by another Adobe Analytics account or applications created on platforms other than IOS and Android.

Currently, 35% of experimental stream projects are unable to tag using Adobe Analytics. This percentage is expected to climb as more projects qualify for the CMF's "Web Series Program" which is exclusively funded through the Experimental Stream.



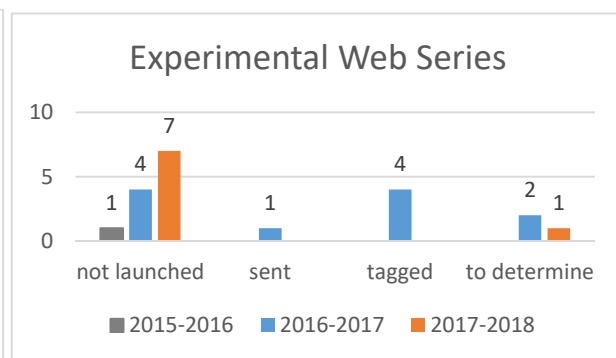
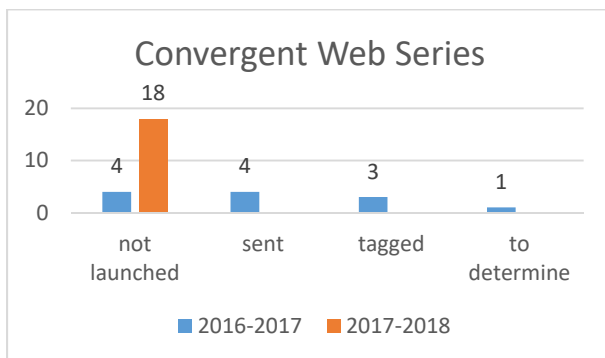
There are currently 157 projects where the applicants have indicated that they do not have the appropriate third-party access to implement the CMF tracking code and may require a self-reporting mechanism. However, broadcaster assistance with implementing the tags hosted on their owned and operated websites would increase the potential to lift the compliance standards within the Convergent Stream.

In the Experimental Stream, the vast majority of projects came from Downloadable Games and Game Apps (examples listed above).

While on the Convergent side, these projects are predominantly Rich Interactive Media (Inclusive) content, Video and Games that are a combination of apps and broadcaster hosted websites.

The CMF is cognizant that third-party hosted video and game apps do require a well-thought-out self-reporting mechanism to primarily capture usage on YouTube and Steam.

As for web-series financed in both streams, the majority of projects are not yet completed or at a stage where they are ready to be tagged. These projects are mostly from the 2016-17 and 2017-18 funding years (see below).



Compliance Report

All Projects

% Adobe Only			% Non-Taggable Only		% Overall Total *		
Program Stream Split Adobe-Taggable	Total Tag Required	Percentage of Projects	Possible Self Reporting (TBD)	%	Total Projects by Stream	% Adobe Tag Required	% (TBD) Self Reporting
Convergent	854	84%	69	44%	923	93%	7%
Experimental	167	16%	88	56%	255	65%	35%
Total	1021	100%	157	100%	1178	87%	13%

As at October 23, 2018

*Excludes (EOL) End of Life Projects. 734 projects have successfully concluded their exploitation and are offline.

Tagged with Adobe Analytics

ALL Convergent & Experimental (Tagged or in-progress projects)

72%

Of all R&S DM have been tagged to date.

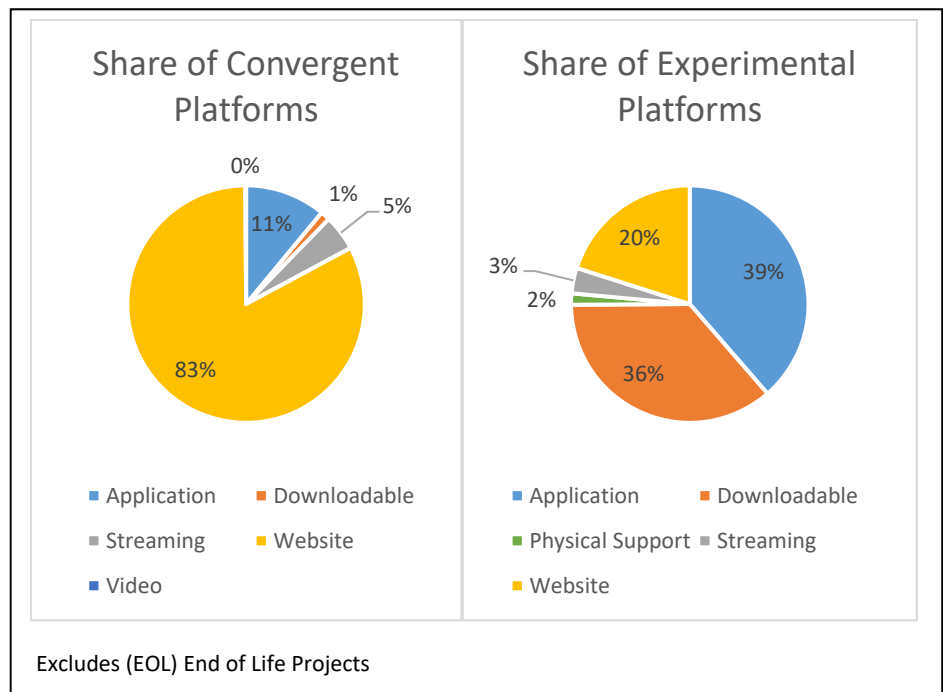
Convergent & Experimental (Tagged or in-progress projects)

76%

Convergent

56%

Experimental



Overall, 87% (1,178) of the new and active CMF funded DM projects have the ability to install the Adobe Analytics tracking code for passive data collection. Only 13% (157) have identified that they cannot implement the tag due to third party hosting limitations or their delivery method is not yet supported by Adobe.

72% of all (1,021) active projects with the ability to tag using Adobe Analytics have either completed installing the tracking codes or are in the process of doing so. This equates to 76% Convergent and 56% Experimental stream projects.

The majority (87%) of new and active Convergent Steam projects are Websites, followed by Applications at 11%.

On the Experimental side, the platforms are primarily split three ways, 39% Application, 36% Downloadable and 20% Websites.

Default

Using the new Dialogue system, the CMF and CMFPA will place into default non-compliant projects in the 2019-2020 funding year. There are currently a total of 33 unresponsive projects (18 Convergent and 15 Experimental). These projects are poised to be placed in default status as multiple attempts have already been made to contact the applicants.

As a reminder, all Convergent Rich & Substantial¹ DM Applicants are required to contact the CMF to request and successfully install CMF Digital Analytics tracking codes within 6 months of their initial contract signing date, or prior to the digital media component launch date, whichever comes first. Failure to comply will result in the project being placed in default. It is the responsibility of the applicant to contact the CMF if an extension beyond this period is required.

Which programs are measured?

All “Rich and Substantial” DM projects in both the Experimental and Convergent streams which received Production financing are required to tag. For clarity, these programs include:

Convergent Stream	Experimental Stream	International Incentives
Aboriginal	Commercial Projects Pilot Program – Production	Germany
CDMI	Innovation Program – Production	Luxembourg
Diverse Languages	Web Series Pilot Program	Wallonia
English POV		More...
Northern Incentive		
Performance Envelope		

“Value Added” DM projects are exempt from the requirement to tag.

Digital Media Measurement Framework

The current Digital Media Measurement Framework was developed in 2011, in partnership with industry stakeholders.

Its key objectives were to:

- Provide a harmonized set of metrics and key performance indicators (KPIs) to measure the success of digital media projects funded by the CMF across all eligible platforms, for both the Convergent and Experimental streams.
- Address an obligation arising from the CMF’s Contribution Agreement with the Department of Canadian Heritage Provide audience, usage, and revenue data for CMF-supported digital content on platforms other than television.

¹ Rich & Substantial Digital Media Components as defined in section 3.2.DM of the Performance Envelope Program Guidelines.

- Provide CMF stakeholders with efficient (i.e. comprehensive and simple) and unified standards to assess the performance of CMF projects involving digital content.
- Develop weighting factors starting in the 2013-2014 fiscal year for digital media performance to be used in the Performance Envelope calculation; the latter of which the CMF eventually decided not to pursue.

While the framework has been refined to address classifications and definitions over the years, the CMF’s key objectives remain the same today in a digital landscape that continues to change rapidly.

CMF DIGITAL MEDIA FRAMEWORK CATEGORIES				
STREAM	LANGUAGE	GENRE	DELIVERY METHODS	CONTENT TYPES
[1]CONVERGENT >>	[1]ENGLISH	[1]C&Y	[1]WEBSITE	[1]RIM Non-Inclusive
	[2]FRENCH	[2]DOC	[2]APPLICATION	[2]GAME
	[3]ABORIGINAL	[3]DRAMA	[3]PHYSICAL SUPPORT	[3]VIDEO
	[4]DIVERSE	[4]VAPA	[4]DOWNLOADABLE	[4]eBOOK
[2]EXPERIMENTAL >>	[5]BILINGUAL >	[0]N/A	[5]STREAMING	[5]SOCIAL MEDIA
			[6]...Future Methods	[6] RIM Inclusive

NB: The measurement framework does not apply to VOD or to CMF-funded television programs distributed through digital means (e.g. catch-up TV, simultaneous webcasts, etcetera).

Currently, each DM application for funding is assigned a 6 digit contract number from CMFPA. Within that same application the applicant identifies the Content Type (Video, Web Series, Game, etc.) and Delivery Method (Website, Apps, eBook, etcetera). Each Content Type and Delivery Method are assigned a numeric value which is then converted into an “applicationID”. Included in this ID # is the fiscal year of financing along with numbers representing the funded language and genre of each project. Once a tag is requested, the applicant or its third-party host is instructed to add their tag (including the ID) to the project at the content type level. This unique applicationID enables the CMF to compare projects based on any of the categories listed above, regardless of its creative content.

Available metrics within Adobe Analytics

Websites that have installed the Iframe (proxy)tag	Visits/Visitor, Geographic, Device & Browser type (Not available: Time spent)
IOS and Android Apps that have only the CMF’s Adobe SDK implemented	Lifecycle Metrics and Dimensions Additional Mobile Metrics and Dimensions

Discussion Topic: Restructuring the DMMF (Plan, Goals & End result)

Become platform centric or platform agnostic (omni-platform) focused?

At various CMF Working Groups and Focus Groups held during the months of September and October 2018, the issue of convergence in today’s media environment emerged. Specifically, stakeholders discussed whether the Fund should move towards a content centric, platform agnostic model to measure success, with particular reference to long-form content consumption across multiple distribution platforms.

While the projects that fall under the DMMF are currently not meant for catch-up TV viewing or simultaneous webcasts of a funded TV program, we believe the trending consumer usage habits to those types of digital media provides insight into the way content is likely to be consumed in the near future.

Consumers' desire for on-demand and frictionless access to all the content they want. However, on the business side, the digital environment is splintering into an ever-increasing number of 'walled content gardens.' Canadians now have some 25 online television services to choose from, in addition to traditional options, and we can expect more to come, Apple, Disney, Warner Media and Jeffrey Katzenberg's Quibi, among others, are working on direct-to-consumer platforms of their own. As more and more industry players choose the direct-to-consumer route, the digital content ecosystem, already fragmented across multiple screens, is bound to further splinter across more access points and paywalls.

That increased fragmentation will potentially lead to consumer frustration—and a resurgence of content piracy, according to [Sandvine](#). It will also prove challenging in terms of audience measurement as the number of proprietary platforms to be tracked on multiple screens continues to grow.

Adopting a platform centric approach would align the CMF to the trend seen in business practice and could allow for us to better understand the universe in which a project is active. However, based on consumer desire, the growth of voice initiated interactions and the adaptation of virtual assistants through artificial learning technology could become the next major disrupter.

Utilities that provide consumers with an easy-to-use omni-platform experience such as Amazon's Alexa, Samsung's Bixby, Google Home, Apple's Siri + Home Pod, AIVC's Alice and Microsoft's Cortina, which is embedded in PC's, Windows Phones, Headphones, iPhones, Xbox One, Windows Mixed reality, and more, have the ability to provide deeper insights from content access via multi-channels versus individual "walled gardens".

While this technology may still be in the emerging phase, there is rapid growth in this area that could also aid with discoverability of content.

Along with the basic user demographic and device type data, there is a potential to aggregate and measure additional data such as:

Sentiment analysis: The language used, as well as tone or pitch of users, can help to measure the sentiment of a brand or of the user experience itself.

Intent and parameter: Intent (what the user is asking for- i.e. "Find me a (Virtual Reality Game" or "video") and parameter (i.e. the specific, contextual request, such as "Degrassi, Flashpoint or for kids") provide insights on consumer behavior.

Pathing: Pathing includes the steps of the conversation as well as what actions users take afterward.

In considering the restructuring of the DMMF, it is apparent there exists a conflict between consumer desires and business interest:

Q1: Should the CMF adapt a strategy that is platform centric (based on the echo systems of specific walled gardens)?

Q2: Should the focus turn to platform agnostic measurement (Omni-platform utilities to aggregate the users' interaction across multiple platforms)?

Q3: What are the potential concerns regarding measurement through either of these strategies?

Proposed efficiencies to current DMMF

When looked at for potential efficiencies to the existing DMMF, enhancements to four areas were proposed:

- Clearly define categories and definitions in a simple and user friendly way
- Include VR & AR in the categories used in application data analysis and measurement reports.
- Additional KPIs for Future DM Reports & Benchmarking
- Include additional attributes to further contextualize the measurement data

Clearly define categories and definitions in a simple and user friendly way

The CMF has made efforts to ensure that the DMMF delivery methods and content type [definitions](#) are available as a reference document at multiple stages throughout the application process – from the “How to apply” to Programs section on the CMF website, to the eTelefilm application document and through to the request for tagging application form. The correct tagging of each CMF-DM project is dependent on the categories selected within the application form. As available technologies continue to advance, the CMF proposes to further simplify the definitions and include VR & AR categories - filtered as sub-categories for reporting purposes, (i.e. Video – AR, Video – VR, Game - AR , Game - VR).

Q4: Are there specific clarifications or definitions that are still unclear?

Q5: There other emerging technologies or categories that could possibly be listed and how?

KPI for Future DM Reports & Benchmarking:

Although success is a general term, the CMF can look at setting up benchmarks. For example, generic success events and varying success metrics for different types of property/content. If a video plays more than 80%, then it is considered a success, x time elapsed, # of pages in, or other action markers. The end result would be a uniform success measurement with clear definitions of what “success” would mean in different content types or properties. This would enable the CMF to measure or create a ratio of visits to successes.

Event based tagging is currently not requested in the existing iframe code and will require additional steps at the tag implementation stage. Testing would be required of both the individual iframe and the bulk tagging (Broadcaster) solutions.

Also, it may be beneficial to begin exploration of varying benchmarking metrics using past data as a baseline to compare project performance in reference to other similar types of projects. The CMF may consider expanding KPIs to include lifecycle related metrics. For example, TV related website projects may have a shorter lifecycle than an application or game because it is tied to a particular season. As such, projects in their first run might typically result in higher traffic than subsequent seasons.

Currently, completion date or exploitation windows are currently not factored into the data. However, contracts between the CMF applicant and its third-party host typically adhere to a schedule (i.e. 24 months). To better

understand the life cycles of these projects the CMF could ask the applicant to provide the date in which the host will no-longer exploit the projects – at the tagging request stage. Gathering this data would allow the CMF to glean insights into periods when “dips” in the aggregated data appears.

Could include comparisons against funding levels and or sales

Though funding levels and sales are currently reported-on within the organization, typically that data is not cross referenced and segmented against visitors or session data available within Adobe Analytics. The CMF could consider breakdown funding into groups and then look at category performances against the funding amount, or review ROI on visitors/views/reach to funding amounts and/or sales activities.

Q6: As stakeholders, what are the most important success markers you would like to see the CMF capture?

Q7: Are there additional metrics that should be considered?

Further contextualize the measurement data

To further contextualize the measurement data, a suggestion was made to look at each project starting with functionality silos. Delivery Method would be equivalent to Technology used.

Utility: Technology used to support the computer infrastructure.

Entertainment: Provides amusement or enjoyment, displayed digitally (computers, laptops, tablets, smart phones, AR and VR environments)

Education: Digital learning that is accompanied by technology including: augmented and virtual learning

Function (purpose)	Technology (platform)	Content Type (what the user is using)
Education	AR/VR	Video
Entertainment	Cross Platform	Software
Utility	IOT (internet of things)	Rim non-inclusive (multiple content website)
	Mobile	Rim inclusive (experienced based website)
	Streaming	Live – Real time
	Wearable	Game
	Website	

Alternatively, project data could also be evaluated within a pre-defined platform eco-system. This would use the existing data collected from Adobe Analytics and current un-taggable projects. Revised “platform – type” silos:

3rd party streaming host:

Broadcaster hosted:

Applicant hosted:

These silos could also have sub-categories for specific platforms such as: Facebook, Steam, YouTube etc.

Q8: Is there a preferred context in which to group the R&S projects, Functional or Host oriented?

Convergence – The second platform

When the Department of Canadian Heritage announced the creation of the Canada Media Fund in 2009, the goal was to support sustainable production of successful, convergent television and digital media content that is accessible to Canadians through multiple platforms.

As a direct result, the CMF launched two streams of funding: the Convergent Stream (TV and DM triggered by a CRTC accredited broadcaster) and the Experimental Stream (DM created by a non-broadcaster entity).

Moving forward, the CMF plans to broaden the eligible funding triggers to include Canadian online platforms owned and controlled by CRTC-licensed broadcasters and broadcast distribution undertakings. The CMF also seeks to become a content centric, platform agnostic funding agency. However, “convergence” as stipulated in the CMF’s contribution agreement with DCH requires a digital second component connected to a linear television program, and as such this requirement will likely remain unchanged for some time.

That withstanding, the following questions have been posed:

Q9: Should the CMF’s definition of “convergence” be redefined?

Q10: Does the CMF still need to encourage industry partnerships between Television and Digital Media productions?

Q11: Should the purpose of second platform content type focus be the discoverability of the linear property?

From a measurement perspective, the Convergent Stream currently funds “value added” digital media projects that are not required to tag for audience measurement, while “Rich and Substantial” projects do. Therefore, not all convergent projects are currently captured and it is impossible to have a full picture of its universe and or reach.

Q12: Should the efforts of the CMF focus on measuring long form digital content?

Measurement Research of Interest

In January 2018, the Council for Premium Video, Europe published a video measurement matrix that outlines the current capabilities and methodologies employed by eight audience measurement providers: BARB (United Kingdom), comScore, GfK, Kantar, Médiamétrie (France), MMS (Sweden), Nielsen and SKO (The Netherlands). The report is available online:

http://www.egta.com/uploads/technav_videos_docs/2018_freewheel_europ_video_meas_matrix.pdf.