

Advertiser Agency Advisory Committee Needs Assessment Report

Project Vista

Executive Summary

In 2020, the World Federation of Advertisers published the *Industry Framework for Cross-Media Measurement (the “Industry Framework”)*¹. In 2021, the Association of Canadian Advertisers (ACA), Association des Agences de Communication Creative (A2C), Canadian Media Directors Council (CMDC), thinktv and Numeris formed an Industry Measurement Advisory Group (IMAG), aligned with the WFA Global Principles, with the objective of determining the Canadian market needs and capabilities related to cross-platform video measurement through an initiative known as Project Vista.

As part of the initial consultation stage of Project Vista, the Advertiser Agency Advisory Committee (AAAC) established three key prioritized, buy-side measurement principles that are fundamental to meeting their needs around cross-platform video measurement in Canada in the short and long terms:

- 1. Cross-Platform Deduplicated Ad Reach and Frequency;**
- 2. Consistent Impression-based Viewable Ad Measurement; and**
- 3. Cross-Platform Ad Optimization.**

¹ <https://wfanet.org/leadership/cross-media-measurement>

A Requirements Committee of participants with subject matter expertise and nominated by AAAC member companies was then involved in prioritizing specific measurement metrics required to help advertisers and agencies effectively plan, buy, and optimize cross-video platform campaigns. The Requirements Committee also identified the gaps/challenges within the buy-side's processes, systems, and workflows.

Agreement

The AAAC measurement needs and supporting metrics set out in this report have been agreed upon by the following AAAC advertisers and agencies²:

ACA, A2C, Bell, CMDC, Dairy Farmers of Canada, Dentsu, Desjardins, GroupM, IPG, Loblaw, L'Oréal, Lowe's, Omnicom, P&G, Publicis Media, Reitmans, Rona, Subway, and Unilever.

1. Background

1.1 Establishment of IMAG

In 2020, the World Federation of Advertisers published the Industry Framework. In it, the WFA asked industry players to engage in meaningful discussions around delivering a new paradigm in cross-media measurement. Aligned with the North Star principles³ set out in the Industry Framework, the Association of Canadian Advertisers (ACA), Association des Agences de Communication Creative (A2C), Canadian Media Directors Council (CMDC), thinktv and Numeris agreed to form an Industry Measurement Advisory Group (IMAG) to determine the Canadian market needs and capabilities related to the implementation of cross-platform video measurement through an initiative known as Project Vista.

² See Appendix A for names of company representatives.

³ See Appendix B

1.2 Determining the Needs of Advertisers and Agencies

The AAAC was formed as part of IMAG's efforts to include the perspectives of a diverse range of small, mid-sized, and large advertisers and agencies representing local, regional, and national business operations in both official languages. This expert group of advertiser and agency representatives was tasked with providing a comprehensive view of the buy-side measurement needs related to cross-platform video measurement. This report is the product of a lengthy consultation process with members of the AAAC and the subject matter experts nominated by them.

1.3 Consultation Process

The consultation process with the AAAC proceeded as follows:

- A survey of Canadian advertisers and agencies to identify high-level needs related to cross-platform media measurement.
- Workshops with members of AAAC to establish key principles informed by 1) survey results; and 2) stated measurement needs and practices of member companies.
- The establishment of working groups representing AAAC members with subject matter expertise in media research and investment, analytics, planning, and advertising sales.
- These working groups, facilitated by a project manager, Greg Dinsmore, prioritized specific measurement metrics required to support the AAAC measurement principles.
- Measurement metrics were prioritized as Core or Secondary needs by AAAC based on the three agreed upon key measurement principles.
- The Requirements Committee then signed-off on the consultation process results.

2. Survey Findings⁴

Results of the survey aligned with the WFA principle of deduplicated reach and frequency and identified the following high-level attitudes towards campaign measurement needs in Canada:

- Improvements are required by advertisers and agencies across measurement, with cross-platform video measurement ranking as the highest priority for advertisers and agencies.
- Advertisers and agencies categorized data quality, granularity, and connection as the greatest measurement challenges.
- Advertisers and agencies wish to shift reliance on output measurement in favour of optimizing against business outcomes:
 - **Output** measurement is primarily ad delivery analysis, often in-campaign, augmented with deeper analyses of output variables, e.g., Reach/Frequency, Conversion, Attention, and Engagement.
 - **Outcome** measurement takes many forms and often requires a combination of multiple approaches conducted following the completion of a campaign or on annual or other bases, e.g., Brand and Sales Lift studies, Market Mix and Brand Health Modeling.

3. Key Measurement Needs as Fundamental Principles

Workshops which took place post-survey and data aggregation were designed to refine measurement needs further. Attendees reinforced the connection between campaign measurement and strategic goals, such as the growth of marketing ROI and key brand objectives. They emphasized the need for linking measurements with campaign planning and determined that cross-platform video metrics for optimization were less urgent than those related to campaign planning.

⁴ Survey Methodology available upon request

Consequently, the AAAC established the following **Key Measurement Principles**:

1. **Cross-Platform Deduplicated Ad Reach and Frequency;**
2. **Consistent Impression-based Viewable Ad Measurement; and**
3. **Cross-Platform Ad Optimization.**

3.1 Cross-Platform Deduplicated Ad Reach and Frequency

Cross-platform deduplicated ad reach and frequency were confirmed as Core needs for comprehensive campaign planning. Advertisers and agencies consider it essential to know how many unique individuals each ad campaign reaches and how frequently an ad is shown to each individual across all platforms. Cross-platform video deduplicated ad reach and frequency must also include measurement by specific demographics to facilitate targeted campaign measurement.

3.2 Consistent Impression-based Viewable Ad Measurement

Consistent impression-based viewable ad measurement was confirmed as a Core need. Advertisers and agencies must be able to report on the delivery of each campaign across all video platforms and evaluate that performance consistently and reliably. Consistent impression-based viewable ad measurement is also required to improve the quality of inputs necessary for outcome measurement. The determination of specific viewability standards is outside of the scope of this initiative.

3.3 Cross-Platform Ad optimization

While the AAAC recognizes the need for in-flight optimization of campaigns, this was identified as less urgent than implementing campaign measurement metrics. Consequently, metrics associated with optimization were categorized as Secondary needs.

3.4 Additional requirements

3.4.1 Representative panel and census data

In line with the WFA principles, the AAAC confirmed that any comprehensive cross-platform video measurement system must include both representative panel and census data to provide the most accurate and reliable measurement. Consideration of how to achieve that is outside the scope of this needs assessment.

3.4.2 Aggregation and standardization of data inputs across multiple data sources

The AAAC highlighted the challenge of aggregating inconsistent and non-standard video metrics across many platforms and data sources. They emphasized the need to bring that data together consistently and reliably.

3.4.3 Future Proofing Cross-Platform Video Measurement

Given the rapidly changing media world, efforts must be made to ensure that any ad measurement system is extensible to other media platforms to the extent possible to ensure that advertisers and agencies, and in some cases, media owners, can effectively measure their ad campaigns now and in the future.

4. Metrics to Support Key Measurement Principles

The Requirements Committee categorized specific video measurement metrics against the Key Measurement Principles and identified existing gaps and challenges to the achievement of those metrics.

Metrics associated with Measurement Principles 1 and 2 were identified as Core needs, and those related to Principle 3 were identified as Secondary needs:

- Core** { 1. **Cross-Platform Deduplicated Ad Reach and Frequency**
- 2. **Consistent Impression-based Viewable Ad Measurement**
- Secondary** { 3. **Cross-Platform Ad Optimization**

Measurement Metrics				
Alignment with Key Principles	Core/Secondary Need	Type	Metric/Dimension	Currently Available?
1 - Unduplicated Reach and Frequency	Core	Audience (Demos and Behaviours)	Unduplicated Reach	Not Currently Available
1 - Unduplicated Reach and Frequency	Core	Audience (Demos and Behaviours)	Unduplicated Frequency	Not Currently Available
1 - Unduplicated Reach and Frequency	Core	General	Platform (OTT, TV, Desktop, Mobile Web, App)	Y
1 - Unduplicated Reach and Frequency	Core	General	Device Type	Y
1 - Unduplicated Reach and Frequency	Core	Audience (Demos and Behaviours)	Granular Demo (Age, Gender, Race, Ethnicity, Language)	Not consistently measured outside of Linear TV
1 - Unduplicated Reach and Frequency	Core	Audience (Demos and Behaviours)	Data Origin (First/Third Party, Declared, Observed, Modelled)	Y
1 - Unduplicated Reach and Frequency	Core	Audience (Demos and Behaviours)	Aggregated Demo (Age and Gender)	Not consistently measured outside of Linear TV
1 - Unduplicated Reach and Frequency	Core	Audience (Demos and Behaviours)	Geography	Y
1 - Unduplicated Reach and Frequency	Core	Audience (Demos and Behaviours)	Additional aggregated Demo's (Race, Ethnicity, Language etc.)	Not Currently Available

Measurement Metrics				
Alignment with Key Principles	Core/Secondary Need	Type	Metric/Dimension	Currently Available?
2 - Standardized Viewable Impression Measurement	Core	Ad Impressions (Digital & TV)	Rendered Impression	Y
2 - Standardized Viewable Impression Measurement	Core	Ad Impressions (Digital & TV)	Data Date & Daypart	Y
2 - Standardized Viewable Impression Measurement	Core	Ad Impressions (Digital & TV)	Advertiser ID	Y
2 - Standardized Viewable Impression Measurement	Core	Ad Impressions (Digital & TV)	Campaign ID	Y
2 - Standardized Viewable Impression Measurement	Core	Ad Impressions (Digital & TV)	Broadcaster / Publisher ID	Y
2 - Standardized Viewable Impression Measurement	Core	Ad Impressions (Digital & TV)	Channel / Site / App ID	Y
2 - Standardized Viewable Impression Measurement	Core	Viewability	Measured Impression	Not in Linear TV measurement
2 - Standardized Viewable Impression Measurement	Core	Viewability	Viewable/Non-viewable Impression	Not in Linear TV measurement
2 - Standardized Viewable Impression Measurement	Core	Television Content	HD/SD	Y
2 - Standardized Viewable Impression Measurement	Core	Television Content	Source/Channel	Y
2 - Standardized Viewable Impression Measurement	Core	Television Content	Broadcast Time/Viewing Time (live or TSV)	Y

Measurement Metrics				
Alignment with Key Principles	Core/Secondary Need	Type	Metric/Dimension	Currently Available?
2 - Standardized Viewable Impression Measurement	Core	Television Content	Network or Local Affiliate	Y
2 - Standardized Viewable Impression Measurement	Core	Television Content	Program ID/Name	Y
2 - Standardized Viewable Impression Measurement	Core	Television Content	Data Date & Daypart	Y
2 - Standardized Viewable Impression Measurement	Core	Television Content	Playback Time & Duration	Y
2 - Standardized Viewable Impression Measurement	Core	Ad Impressions (Digital & TV)	Unique Creative ID	Y
2 - Standardized Viewable Impression Measurement	Core	Ad Impressions (Digital & TV)	Creative Type	Y
2 - Standardized Viewable Impression Measurement	Core	Video Ads (Including OTT)	Playback Time / Duration (total or threshold based)	Depends on platform/Inconsistent across Platform
2 - Standardized Viewable Impression Measurement	Core	Video Ads (Including OTT)	Viewable Duration (total or threshold based)	Depends on platform/Inconsistent across Platform
2 - Standardized Viewable Impression Measurement	Core	Video Ads (Including OTT)	Creative Length	Y
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Quartile Complete Yes/No Q1-Q4	Depends on platform/Inconsistent across Platform
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Auto-Play/Click to Play	Depends on platform/Inconsistent across Platform

Measurement Metrics				
Alignment with Key Principles	Core/Secondary Need	Type	Metric/Dimension	Currently Available?
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Forced Duration	Depends on platform/Inconsistent across Platform
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Audio Status (Mute/Non-zero, Captions)	Depends on platform/Inconsistent across Platform
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Creative Size	Y
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Completion (Y/N)	Depends on platform/Inconsistent across Platform
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Continuous Play	Y
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Audio Status (Mute, Non-zero, Captions, Unknown)	Depends on platform/Inconsistent across Platform
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Ad Insertion Model Dynamic/Static	Depends on platform/Inconsistent across Platform
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Ad Supported Yes/No	Y
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Monetizable Yes/No	Y
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Content Segment / Title	Y
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Playback Time & Duration	Y
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Viewable Duration	Depends on platform/Inconsistent across Platform

Measurement Metrics				
Alignment with Key Principles	Core/Secondary Need	Type	Metric/Dimension	Currently Available?
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Content views	Depends on platform/Inconsistent across Platform
3 - Campaign Optimization	Secondary	Television Content	Audio Status (Mute, Non-zero, Captions, Unknown)	Depends on platform/Inconsistent across Platform
3 - Campaign Optimization	Secondary	Television Content	Viewing Location (In-Home/OOH)	Y
3 - Campaign Optimization	Secondary	Television Content	MVPD/vMVPD/Operator	Depends on platform/Inconsistent across Platform
3 - Campaign Optimization	Secondary	Television Content	Ad Supported Yes/No	Y
3 - Campaign Optimization	Secondary	Television Content	Ad Insertion Model Dynamic/Static	Y
3 - Campaign Optimization	Secondary	Television Content	Viewable Duration	Y
3 - Campaign Optimization	Secondary	Audience (Demos and Behaviours)	Household Data (where applicable)	Depends on platform/Inconsistent across Platform
3 - Campaign Optimization	Secondary	Audience (Demos and Behaviours)	Presence Indicators	Depends on platform/Inconsistent across Platform
3 - Campaign Optimization	Secondary	Audience (Demos and Behaviours)	Purchase History	Depends on platform/Inconsistent across Platform
3 - Campaign Optimization	Secondary	General	Browser	Depends on platform/Inconsistent across Platform

5. Data Delivery

5.1 Granularity

The Requirements Committee identified minute-level granularity as a Core need for reporting purposes and a sub-minute viewability threshold as a Core need for campaign planning. The Requirements Committee did not identify any specific sub-minute viewability threshold and the determination of an appropriate threshold is outside the scope of this needs assessment. Second-by-second reporting was identified as a Secondary need related to campaign optimization.

5.2 Interval

Weekly data availability was identified as sufficient to fulfil Core needs of campaign planning and reporting. Daily or real-time data access was identified as a Secondary need.

5.3 Format

The committee identified two distinct types of data delivery needs:

- Analyst/Planner role requires Web Interface to access data
- Data operations teams require an Automated Data Feed

The Analyst/Planner uses the data primarily for planning, analysis, and storytelling (relating to high level campaign performance). The primary requirement ensures that analysts with minimal training and data skills, junior planners, and those in smaller organizations who do not have access to data stacks, are able to easily use the data. Consequently, the Core need from this perspective is a Web interface that can download data for ad hoc analysis.

Conversely, data operations teams require the data to be easily ingested into data warehousing tools for the following purposes: automated analysis, reporting, and dashboards. As such, the Core need was identified as a standardized data feed compatible with the multiple business intelligence tools used across advertisers and agencies. This group's Secondary need was identified as a real-time API that can be used to develop more complex custom data integrations.

6. Next Steps

This report represents the final agreed upon needs of the AAAC as they relate to cross-platform video measurement. At this stage, the report will be shared with both the IMAG Executive Committee and the Media Vendors Advisory Committee (MVC). The MVC will then begin a process like the one conducted with the AAAC, culminating in a final needs and capabilities assessment report. The two final reports will then be presented to the IMAG Executive Committee for consideration and determination of next steps.

Appendix “A”

Scope & Ambition (the Advertiser ‘North Star’)

As a group, we have identified four key, prioritised, buy-side needs from cross media measurement. These needs are balanced by critical, advertiser supported, industry requirements.

This balanced set of needs should form the basis for the design and implementation of ideal solutions:

“ Cross-media measurement is a true team sport – it’s going to require many in the industry to make progress together. The industry needs a common playbook to pull towards and we’ve worked hard to deliver that. We’re confident that we can align the industry around advertisers’ needs, we’re going to win. ”

Ben Jankowski
SVP Global Media, Mastercard



Global principles



Advertiser needs (‘North Star’)

Full lifecycle measurement
Planning/Reporting/Optimisation

Continuous
Tagless, always-on data capture

Comprehensive
TV & digital (but not limited to video)

Full-funnel
Outputs & outcomes measurement

Industry requirements (Advertiser supported)

Privacy-safe
Respect for consumer & no risk of re-identification

Fair & objective metrics
Neutral service with metrics for comparability

Trust & transparency
Enshrined through regular audits

Advertising & content
Measuring ads and editorial context/content



Local adaptation

Appendix "B"

The AAAC measurement needs and supporting metrics set out in this report have been agreed upon by the following representatives of AAAC member company advertisers, agencies, and associations:

Siraj Ajani	Dentsu
Norman Amparo	Lowes
Jonathan Archambault	Rona
Scott Atkinson	Publicis Media
Michele Beaulieu	Subway
Louis-Philippe Charland	Rona
Judy Davey	ACA
Sean Dixon	Omnicom
Sarah-Anne Ducreux	L'Oréal
Matt Ebers	Dairy Farmers of Canada
Catherine Fernet	Reitmans
Corby Fine	Bell
Ken Gamage	Cossette Media
Siddarth Gupta	Dentsu
Robin Hassan	Unilever
Chris Herlihey	IPG
Judi Hoffman	P&G
Prashanth Kanagalingam	Loblaw
Shannon Lewis	CMDC
Geneviève Marchand	A2C
Raphael Metter-Rothan	Desjardins
Gautham Pingali	GroupM
Karen Purewall	Wavemaker
Janberk Ruscuklu	Dentsu
Jeremy Simpson	Omnicom