

# Media Vendor Advisory Committee Measurement Capabilities Assessment Report

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## Project Vista

### Executive Summary

As part of Project Vista's second phase, the AAAC Measurement Needs Assessment Report (the "**AAAC Report**") was given to the Media Vendor Advisory Committee ("**MVC**") for comment. The objectives for this second phase were to confirm the MVC's agreement with the key measurement principles and metrics established by the AAAC, provide guidance on the current measurement needs and capabilities of MVC member companies, and identify the gaps and challenges the industry must address to advance toward effective cross-platform video measurement. This report documents the combined efforts of MVC members and their designates on the MVC Requirements Committee, all of whom have substantial experience in advertising and media measurement.

**Key Measurement Principles and Video Measurement Metrics.** The AAAC has established three key prioritized buy-side measurement principles (the "**Key Measurement Principles**") that are fundamental to meeting advertiser and agency 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.**

In addition, the AAAC categorized specific cross-platform video measurement metrics in support of the Key Measurement Principles (the "**Video Measurement Metrics**").

To properly respond to the AAAC Report, MVC members appointed subject matter experts from their organizations to participate in the MVC Requirements Committee. On behalf of their companies, the MVC Requirements Committee reviewed the Video Measurement Metrics and identified additional gaps or challenges to delivering against those Metrics. The Video Measurement Metrics (together with MVC comments) are set out in Appendix A.

**The culmination of the consultation process was the agreement by the MVC Requirements Committee on behalf of their member companies with the Key Measurement Principles and Video Measurement Metrics as prioritized by the AAAC in the AAAC Report<sup>1</sup> with the addition of certain requirements.**

**MVC Requirements.** The MVC agreement is premised on establishing certain minimum governance and technical requirements to support any future cross-platform video measurement solution. The MVC considers these requirements (the "**MVC Requirements**"), which are set out in the table below, as fundamental to successfully addressing the existing and anticipated market gaps and challenges for implementing effective and efficient cross-platform video measurement.

**Moving Forward.** The MVC member companies commit to continue to work collectively with each other and the AAAC member companies using the Key Measurement Principles, the Video Measurement Metrics, and the MVC Requirements as the basis for achieving effective and efficient cross-platform

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<sup>1</sup> The MVC comprises the following member companies: Amazon, Bell Media, CBC/Radio Canada, Corus Entertainment, Google, Meta, Rogers Sports & Media, and ByteDance. The names of MVC and MVC Technical Requirements Committee representatives are set out in Appendix B.

video measurement in Canada. Aligned with the WFA and IMAG principles, the MVC member companies acknowledge that Project Vista, IMAG's initial effort to measure cross-platform video, is the first step toward total cross-platform media measurement and that the implementation of any cross-platform video measurement solution must consider efficiencies around other existing and future platform measurement.

### **MVC Requirements for Cross-Platform Video Measurement**

1. **Census and Panel Data.** Consistent census and panel data of highest quality and integrity and representative of the Canadian population. Complete measurement vs campaign-only measurement.
2. **Privacy.** Robust privacy protocols must be in place in accordance with agreed upon industry standards (aligned with legal and regulatory requirements).
3. **Reporting Requirements.** Reporting must remain consistent and transparent throughout the full campaign cycle so all parties can see the same data throughout the process.
4. **Integration with Ad Ops.** Any solution must integrate with existing ad operations of MVC companies with emphasis on future-proofing to accommodate additional existing and new media platforms.
5. **Industry Standards.** Establishment of agreed upon industry standards, including norms and definitions related to all elements of cross-platform video measurement, e.g., impressions, viewability, reporting, which serve the local market and align with global standards to the extent possible.
6. **Auditing.** Industry agreement with respect to auditing requirements.

## 1. Background

### 1.1 Determining the Needs and Capabilities of Media Vendors

The MVC was created as part of IMAG's efforts to integrate the viewpoints of a broad range of media vendors representing broadcast, online, and social media platforms in the Canadian market. This expert panel of media professionals was charged with providing a response to the AAC's buy-side measurement requirements for cross-platform video measurement. This report summarizes the work and multiple discussions undertaken by members of the MVC and the MVC Requirements Committee.

### 1.2 Consultation Process

The consultation process with the MVC proceeded as follows:

- The MVC Requirements Committee was established with participants designated by each MVC company with subject matter expertise in media research, analytics, planning, and advertising sales.
- Working groups of the MVC Requirements Committee, facilitated by project manager Greg Dinsmore, reviewed the AAC's Key Measurement Principles and the categorization and prioritization of the Video Measurement Metrics.
- Working group members also completed questionnaires and evaluated the Video Measurement Metrics against current measurement capabilities in the marketplace.
- The MVC Requirements Committee then signed-off on the consultation process results.

## 2. Key Measurement Needs as Fundamental Principles

The MVC agrees that the three Key Measurement Principles identified by the AAAC are fundamental to meeting industry needs related to cross-platform video measurement:

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

### 2.1 Cross-Platform Deduplicated Ad Reach and Frequency

The MVC agrees that deduplicated ad reach and frequency are industry necessities for comprehensive campaign planning and selling. Further, the MVC agrees that cross-platform video deduplicated ad reach and frequency must also include measurement by specific demographics to facilitate targeted campaign measurement.

### 2.2 Consistent Impression-based Viewable Ad Measurement

The MVC agrees that consistent, impression-based, viewable ad measurement requires the establishment of agreed upon industry standards and definitions.

### 2.3 Cross-Platform Ad Optimization

The MVC agrees that in-flight optimization of campaigns is a less urgent priority than implementing campaign measurement metrics.

### 2.4 Additional MVC Requirements

#### 2.4.1 Representative panel and census data

In line with the WFA principles, the MVC agrees that any comprehensive cross-platform video measurement system must include both representative panel and census data to provide the most accurate and reliable measurement.

While the details of how such a panel will be set up and configured are outside

of the scope of this assessment, MVC member companies are committed to ensuring that any panel will be representative of the Canadian population, including, without limitation, under-served populations and markets (e.g., new and Indigenous Canadians).

#### **2.4.2 Aggregation and standardization of data inputs across multiple data sources**

The MVC agrees that the challenge of aggregating inconsistent and non-standard video metrics across many platforms and data sources consistently and reliably is at the heart of effective cross-platform video measurement and requires ongoing collaboration by industry stakeholders. The MVC is committed to achieving a shared set of standards that serve the local market and align with global standards to the extent possible.

#### **2.4.3 Future Proofing Cross-Platform Video Measurement**

To ensure that advertisers, agencies, and media vendors can effectively measure campaigns now and in the future, the MVC agrees that any potential measurement system must be extensible to the extent possible to existing media platforms such as digital display, radio, and out-of-home, as well as new media platforms.

### **3. Data Delivery**

#### **3.1 Current Ad Measurement**

##### **3.1.1 Digital advertising**

Digital ad delivery is highly fragmented, with ad-serving suppliers and products changing on a regular basis. Most digital reporting systems can give granular, census-level impression reporting but not precise demographic data. While certain digital vendors can deduplicate reach and frequency within their platforms, this deduplication does not extend to platforms operated by third parties.

### 3.1.2 Linear Television Advertising

The reporting of viewing to television advertising is currently provided by NLogic in partnership with Numeris, the industry's joint industry committee for television audience measurement ("TAM").

Numeris collects television viewing data from a representative panel of about 10,000 Canadian households (covering both linear and non-linear TV households). Reported at the minute level, television consumption of everyone in a household is captured passively in fifteen second intervals by portable people meter (PPMs). The PPMs measure all live television viewing, across all devices, in and outside the home, whether broadcast or streamed, as well as catch-up viewing on PVRs.

While data is available for highly granular demographics across national, regional, and local markets, the panel size and design limit some demographic reporting, specifically viewing by underrepresented groups, and in languages other than French and English.

NLogic uses the Numeris TAM data as the basis of its CMR product, providing ad-level viewing reporting on a commercial minute basis for the five major PPM markets (Montreal, Toronto, Calgary, Edmonton, and Vancouver).

## 3.2 Data Requirements

### 3.2.1 Granularity

The MVC agrees with minute-level granularity as a Core need for reporting purposes and a sub-minute viewability threshold as a Core need for campaign planning. The MVC further agrees that the determination of an appropriate sub-minute viewability threshold is outside the scope of this assessment. The MVC also agrees with AAAC's prioritization of second-by-second reporting as a Secondary need related to campaign optimization.

### 3.2.2 Intervals

The MVC agrees with the prioritization of weekly data availability by the AAAC as a Core need of campaign planning and reporting.

### 3.2.3 Data Format

MVC member companies identified a need to establish data visibility for each participant (i.e., which data is available to each party in a cross-platform measurement system). Some noted a need to make all data visible to all participants (both buy-side and sell-side) to ensure transparency throughout the planning, execution, and reporting phases.

## 4. Next Steps

**This report represents the final agreed upon needs and capabilities of the MVC as they relate to cross-platform video measurement.** This report will be shared with the AAAC. The findings of this report and the AAAC Report will then be brought together in a whitepaper to be presented to the IMAG Executive Committee for consideration and determination of next steps.



Appendix “A”

**Metrics to Support Key Measurement Principles**

The MVC Requirements Committee responded to the Video Measurement Metrics against the Key Measurement Principles and identified additional 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**
- Core** { 2. **Consistent Impression-based Viewable Ad Measurement**
- Secondary** { 3. **Cross-Platform Ad Optimization**

For clarity, the prioritization of AAAC Core needs ahead of Secondary needs represents timing (rather than denoting a level of importance). The AAAC Core needs must be met first to address the AAAC Secondary needs properly.

Alignment with Key Principles	Core/Secondary Need	Type	Metric/Dimension	Summary of Current MVC Availability for Measurement
1 - Unduplicated Reach and Frequency	Core	Audience (Demos and Behaviours)	Unduplicated Reach	Not Currently Available between Platforms/Vendors. Some can deduplicate within platforms
1 - Unduplicated Reach and Frequency	Core	Audience (Demos and Behaviours)	Unduplicated Frequency	Not Currently Available between Platforms/Vendors. Some can deduplicate within platforms
1 - Unduplicated Reach and Frequency	Core	General	Platform (OTT, TV, Desktop, Mobile Web, App)	Available for most ad reporting systems

Alignment with Key Principles	Core/Secondary Need	Type	Metric/Dimension	Summary of Current MVC Availability for Measurement
1 - Unduplicated Reach and Frequency	Core	General	Device Type	Available for most ad reporting systems
1 - Unduplicated Reach and Frequency	Core	Audience (Demos and Behaviours)	Granular Demo (Age, Gender, Race, Ethnicity, Language)	Not consistently measured outside of Linear TV. Some availability for some digital video systems
1 - Unduplicated Reach and Frequency	Core	Audience (Demos and Behaviours)	Data Origin (First/Third Party, Declared, Observed, Modelled)	Generally Available
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	Generally Available
1 - Unduplicated Reach and Frequency	Core	Audience (Demos and Behaviours)	Additional aggregated Demo's (Race, Ethnicity, Language etc.)	Not Currently Available
2 - Standardized Viewable Impression Measurement	Core	Ad Impressions (Digital & TV)	Rendered Impression	Generally Available Digitally. Not captured in Linear unless audible.
2 - Standardized Viewable Impression Measurement	Core	Ad Impressions (Digital & TV)	Data Date & Daypart	Generally Available
2 - Standardized Viewable Impression Measurement	Core	Ad Impressions (Digital & TV)	Advertiser ID	Generally Available
2 - Standardized Viewable Impression Measurement	Core	Ad Impressions (Digital & TV)	Campaign ID	Generally Available

Alignment with Key Principles	Core/Secondary Need	Type	Metric/Dimension	Summary of Current MVC Availability for Measurement
2 - Standardized Viewable Impression Measurement	Core	Ad Impressions (Digital & TV)	Broadcaster / Publisher ID	Generally Available
2 - Standardized Viewable Impression Measurement	Core	Ad Impressions (Digital & TV)	Channel / Site / App ID	Generally Available
2 - Standardized Viewable Impression Measurement	Core	Viewability	Measured Impression	Not in Linear TV measurement. Available for most but not all Digital impressions.
2 - Standardized Viewable Impression Measurement	Core	Viewability	Viewable/Non-viewable Impression	Not in Linear TV measurement. Available for most but not all Digital impressions.
2 - Standardized Viewable Impression Measurement	Core	Television Content	HD/SD	Available in Linear TV Measurement
2 - Standardized Viewable Impression Measurement	Core	Television Content	Source/Channel	Available in Linear TV Measurement
2 - Standardized Viewable Impression Measurement	Core	Television Content	Broadcast Time/Viewing Time (live or TSV)	Available in Linear TV Measurement
2 - Standardized Viewable Impression Measurement	Core	Television Content	Network or Local Affiliate	Available in Linear TV Measurement
2 - Standardized Viewable Impression Measurement	Core	Television Content	Program ID/Name	Available in Linear TV Measurement
2 - Standardized Viewable Impression Measurement	Core	Television Content	Data Date & Daypart	Available in Linear TV Measurement

Alignment with Key Principles	Core/Secondary Need	Type	Metric/Dimension	Summary of Current MVC Availability for Measurement
2 - Standardized Viewable Impression Measurement	Core	Television Content	Playback Time & Duration	Available in Linear TV Measurement
2 - Standardized Viewable Impression Measurement	Core	Ad Impressions (Digital & TV)	Unique Creative ID	Available for most digital platforms. Only available in 5 PPM markets for Linear TV
2 - Standardized Viewable Impression Measurement	Core	Ad Impressions (Digital & TV)	Creative Type	Available for most digital platforms. Only available in 5 PPM markets for Linear TV
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	Available for most digital platforms. Only available in 5 PPM markets for Linear TV
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
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Forced Duration	Depends on platform/Inconsistent across Platform

Alignment with Key Principles	Core/Secondary Need	Type	Metric/Dimension	Summary of Current MVC Availability for Measurement
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	Generally Available
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	Depends on platform/Inconsistent across Platform
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	Generally Available
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Monetizable Yes/No	Generally Available
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Content Segment / Title	Generally Available
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Playback Time & Duration	Generally Available
3 - Campaign Optimization	Secondary	Video Ads (Including OTT)	Viewable Duration	Depends on platform/Inconsistent across Platform

Alignment with Key Principles	Core/Secondary Need	Type	Metric/Dimension	Summary of Current MVC Availability for Measurement
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)	Available in Linear TV only
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	Generally Available
3 - Campaign Optimization	Secondary	Television Content	Ad Insertion Model Dynamic/Static	Generally Available
3 - Campaign Optimization	Secondary	Television Content	Viewable Duration	Depends on platform/Inconsistent across Platform
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

Appendix “B”

The MVC measurement needs and capabilities set out in this report have been agreed upon by the members of the MVC Requirements Committee and the MVC:

<b>MEDIA VENDOR</b>	<b>MEDIA VENDOR ADVISORY COMMITTEE ("MVC")</b>	<b>MVC REQUIREMENTS COMMITTEE MEMBERS*</b>
Amazon	Uri Gorodzinsky and Kendra Hum	Tyler James
Bell Media	Sabrina Segal (*previously Brad Hayden)	Katrina Santos Amanda Chin-Loy
ByteDance	Nik Djukic and Vanessa (V) Gaik	Jorge Ruiz
CBC/Radio Canada	Robin Mrowka	Robin Mrowka
Corus Entertainment	Spencer Charters (*previously Mark Leslie)	Doug Davis
Meta	Stephanie Martone and Luke Stringer	Luke Stringer
Google	Matt Rivard	Anne Mueller Matt Rivard
Rogers Sports & Media	Janice Smith	Sean Howard
<b>*All MVC Requirements Committee Members Designated by MVC Member Company Representatives</b>		