

# ALIGNMENT OF CROSS-MEDIA METRICS

## KEY FINDINGS

NOVEMBER 13TH, 2014



**JOSEPH ABRUZZO**

MCE CHAIR, CRE

EVP, CHIEF EXPLORATION OFFICER, HAVAS MEDIA



council for research excellence

# ABOUT THE CRE

The Council for Research Excellence is a body of senior research professionals, formed in 2005 to identify important questions about audience measurement methodology and to find, through quality research, the answers to those questions.

The Council provides the Nielsen client community a means to undertake research projects no one company could undertake on its own.



council for research excellence

# CRE MEMBER COMPANIES



# **MEDIA CONSUMPTION AND ENGAGEMENT COMMITTEE (MCE)**

**JOSEPH  
ABRUZZO  
(CHAIR)**

**REDJEB  
SHAH (VICE  
CHAIR)**

**TIM  
BROOKS**

**ARTIE  
BULGRIN**

**JOANNE  
BURNS**

**MICHELE  
BUSLIK**

**LAURA  
COWAN**

**NATALIE  
DAVIS**

**BILL  
DUGGAN**

**JANICE  
FINKEL-GREENE**

**BETSY  
FRANK**

**JANET  
GALLENT**

**HADASSA  
GERBER**

**GREG  
IOCCO**

**DIAHANNA  
POST**

**CERIL  
SHAGRIN**

**SUSIE  
THOMAS**

**JUDY  
VOGEL**

**CANDACE  
WHYE**

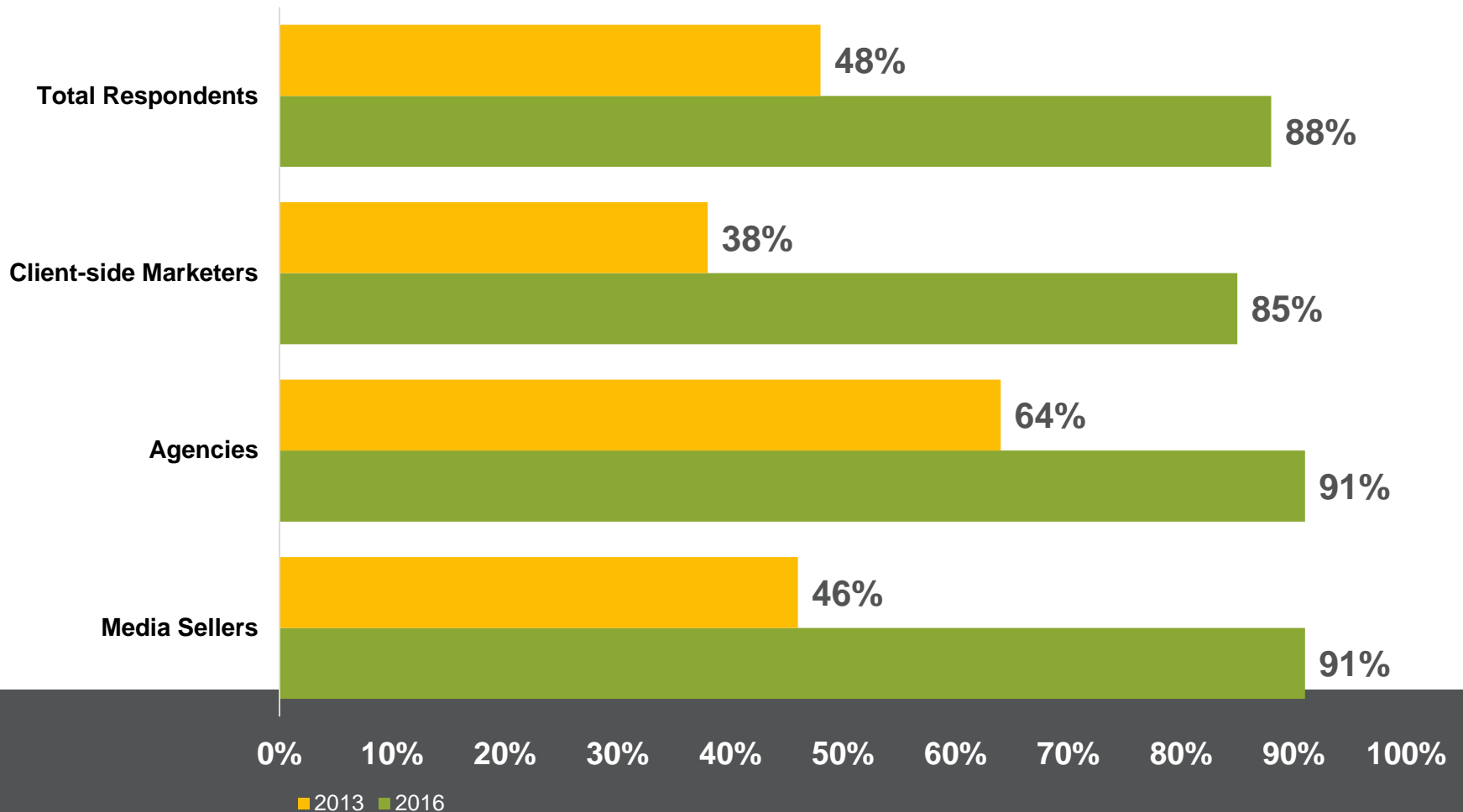
**RICHARD  
ZACKON  
(FACILITATOR]**

# BACKGROUND

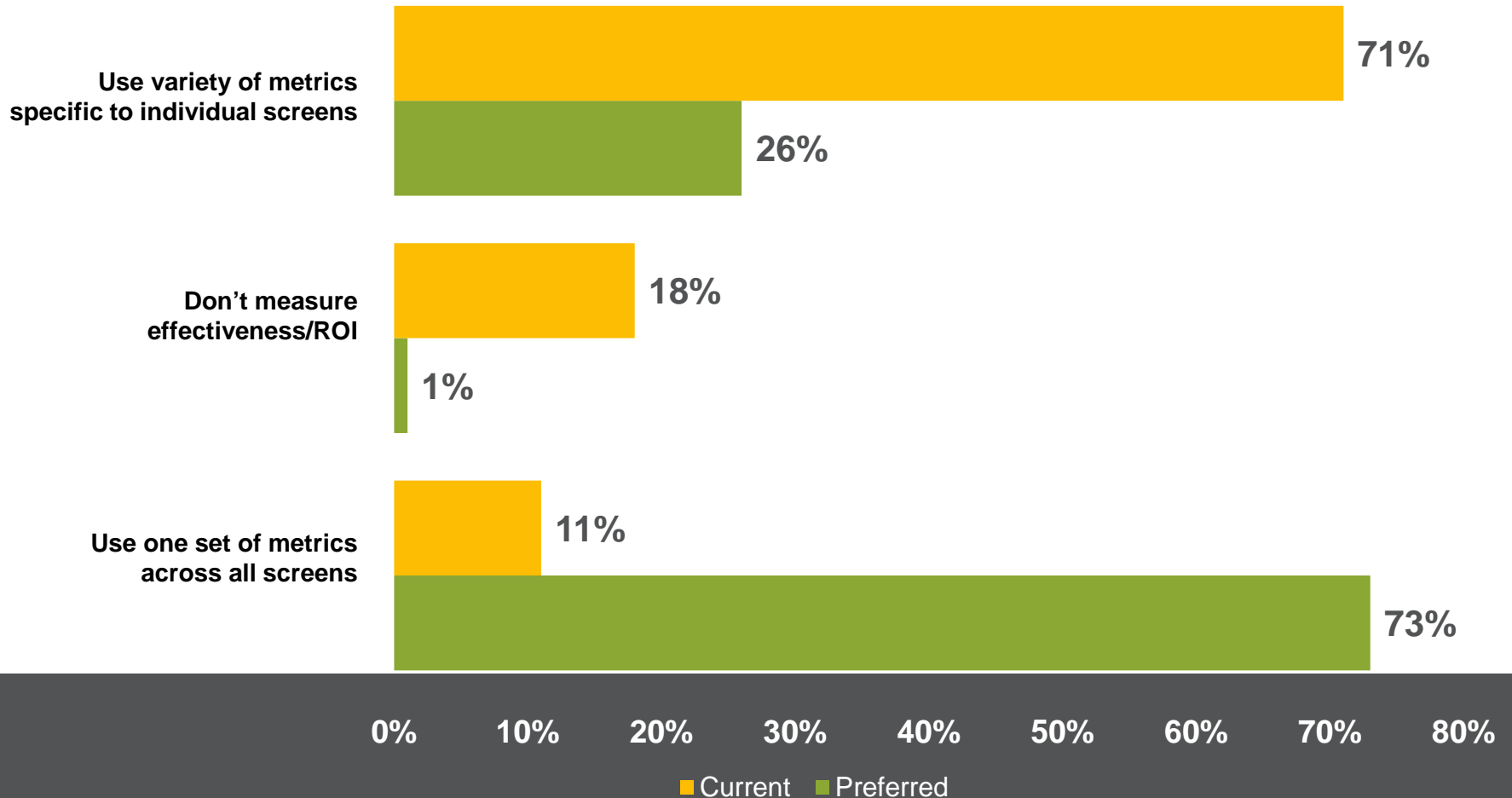
The Media Consumption and Engagement Committee recognized the many efforts to measure exposure across video platforms were making no clear effort to align the metrics across platforms.

**The committee decided to develop a research agenda to do that.**

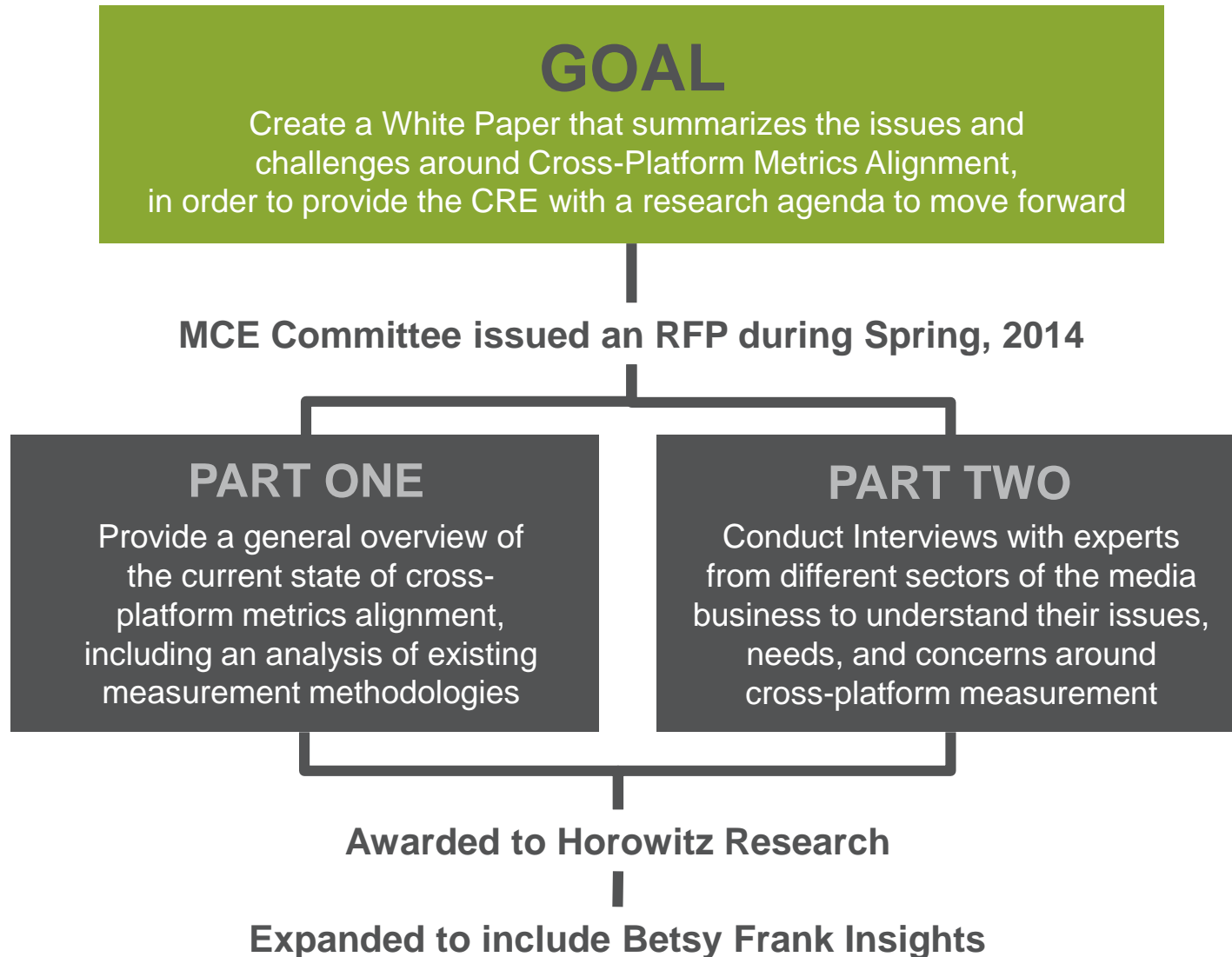
# IMPORTANCE OF INTEGRATED MULTI-SCREEN CAMPAIGNS IN DELIVERING MESSAGE (TOP BOX RATINGS ON 5-POINT SCALE [VERY IMPORTANT])



# CURRENT/PREFERRED MEASUREMENT OF EFFECTIVENESS/ROI OF MULTI-SCREEN CAMPAIGNS



# THE ASSIGNMENT





# INTERVIEW TARGETS

- MCE identified key sectors within the industry
- Horowitz Research developed broad priority list of 150 names
- MCE refined list, including “must have” interviewees
- List pared to 50 names across sectors, including quotas
- New candidates added as needed, with MCE approval

INTERVIEWS COMPLETED BY SECTOR

# MARKETERS



JOSEPH  
BIHLMEIER



FERNANDO  
ARRIOLA



REX  
CONKLIN



AARON  
FETTERS



Kimberly-Clark

JEFF  
HOLECKO



MillerCoors

STEPHANIE  
BENJAMIN



Wendy's

TIM  
SULLIVAN

## INTERVIEWS COMPLETED BY SECTOR

# ADVERTISING AGENCIES



ADAM  
GITLIN



CATHERINE  
WARBURTON



d' expósito & partners.

GLORIA  
CONSTANZA



JOHN  
MONTGOMERY



DAVID  
HANDELMAN



KRIS  
MAGEL



MELVIN  
WILSON



Starcom MediaVest  
GROUP

KATE  
SIRKIN



HUW  
GRIFFITHS

INTERVIEWS COMPLETED BY SECTOR

# BROADCASTERS AND CABLE NETWORKS



MICHAEL TEICHER/  
WHITEY CHAPIN



GERI WANG/  
ADAM GERBER



MICHAEL GRECO/  
SCOTT FELENSTEIN



DONNA SPECIALE/  
DAN AVERSANO



KEVIN CONROY/  
MEHUL NAGRANI



COLLEEN  
FAHEY RUSH



JOHN O'HARA/  
MICHAEL ORGERA



ANONYMOUS



ANONYMOUS

## INTERVIEWS COMPLETED BY SECTOR

# MVPDs

**Charter**  
COMMUNICATIONS

JIM  
HENEGHEN



COMCAST

PAUL  
HOCKENBURY



ANONYMOUS



ANONYMOUS

## INTERVIEWS COMPLETED BY SECTOR

# TECHNOLOGY COMPANIES

The logo for Aol. is displayed in a large, bold, black sans-serif font.

JIM  
NORTON

The Google logo is displayed in its characteristic multi-colored font (blue, red, yellow, green, blue).

SANAZ  
AHARI

The logo for Tremor Video is displayed in a bold, orange sans-serif font for 'TREMOR' and a black sans-serif font for 'VIDEO'.

DORON  
WESLY

INTERVIEWS COMPLETED BY SECTOR

# OTHER NON-BROADCAST MEDIA COMPANIES

CONDÉ NAST

SCOTT  
MCDONALD

 **iHeart** MEDIA INC

TIM SPENGLER/  
RADHA SUBRAMANYAM

## INTERVIEWS COMPLETED BY SECTOR

# RESEARCH COMPANIES



JOSH  
CHASIN



JEFF  
BOEHME



MICHAEL  
LINK



BRUCE  
GOERLICH



Advanced Media

CHARLES  
BUCHWALTER



## INTERVIEWS COMPLETED BY SECTOR

# INDUSTRY ASSOCIATIONS



**BILL  
TUCKER**



**BOB  
LIODICE**



**ADVERTISING  
RESEARCH  
FOUNDATION**

**GAYLE  
FUGUITT**



**JANE  
CLARKE**



**SHERRILL  
MANE**



**GEORGE  
IVIE**

## INTERVIEWS COMPLETED BY SECTOR

# ADDITIONAL INTERVIEWS

*DTE Research, Inc.*

TOM  
EVANS

INDEPENDENT

JACK  
WAKSHLAG

INDEPENDENT

JIM  
FIGURA

 **Sequent**  
partners

JIM  
SPAETH

 **SIMULMEDIA™**

DAVE  
MORGAN

# QUESTIONNAIRE DEVELOPMENT

- ▶ Built upon phase one review of media research practices including journal articles, white papers, other publications
- ▶ Used to create an issue overview and a draft discussion guide
- ▶ Discussion guide refined in collaboration with the MCE



## RESULTS

**45** MINUTE  
QUESTIONNAIRE



IN PERSON

OR



ON THE PHONE

# DISCUSSION GUIDE TOPICS

## THEORETICAL

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Definition

Importance

Issues

## PRAGMATIC

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Buying and Selling  
Challenges

Common Cross-  
Platform Metrics

Current Marketplace  
Solutions

Methodology

## MOVING AHEAD

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Challenges in  
Introducing a New  
Currency or Metric

Near Term  
Research Priorities

KEY  
FINDING **1**

**NOTHING IS MORE  
IMPORTANT THAN  
CROSS-PLATFORM  
MEASUREMENT**

- ▶ High priority across all industry segments (but we need to fix the pieces first)
- ▶ Marketers most focused on it
- ▶ Non-TV media sellers have more urgent challenges
- ▶ Critical business need for Agencies, Media Companies, Research Companies
- ▶ Industry Associations see an opportunity to aid collaboration

KEY  
FINDING **2**

**MEDIA  
FRAGMENTATION  
IS NOTHING NEW**

... but when TV's share of media use and dollars was higher, it was less important to measure new entities

# THERE ARE DEFINITIONAL DIFFERENCES

- ▶ **Broadcasters**  
Video across all platforms and devices
- ▶ **Marketers, Industry Organizations**  
All channels of communication
- ▶ Inconsistent definitions of metrics  
across platforms

KEY  
FINDING **4**

“  
TO GRP OR  
**NOT TO GRP**”

- We need a measure of exposure and reach across platforms
- GRP is simple, but too TV-centric
- Engagement will be important, but now a distraction



KEY  
FINDING **5**

“  
**THE BEST  
OF TIMES,  
THE WORST  
OF TIMES,**”

- ▶ A lot of activity and “trial balloons”
- ▶ None is scalable, none has gained traction
- ▶ They are fragmenting the market and draining dollars and resources

# ADVERTISING AGENCIES AREN'T STANDING STILL

- ▶ Agencies are building their own data-driven systems
- ▶ “When clout becomes a commodity, data is a competitive advantage”
- ▶ Adds to the challenges of creating standards

# THE REALITY OF THE METHODOLOGY

- Single Source is the “ideal,” but acknowledged to be logistically impossible
- Data Integration comes with many caveats around validation, transparency, and trust

# THE STUMBLING BLOCKS WILL BE FORMIDABLE

- ▶ Money and methodology can be overcome
- ▶ Polarizing business issues will demand a “higher authority” to create collaboration

# THE INDUSTRY WANTS ACTION

- ▶ **Measurement of mobile and digital**
- ▶ **Unduplicated and incremental reach**
- ▶ **Effectiveness, context, and experience**



# THE CLOCK IS TICKING

- ▶ The longer the delay, the wider the gap between media use and measurement
- ▶ The greater the likelihood a “non-research” company will define tomorrow’s audience measurement.
- ▶ “Good is good enough;”  
“Don’t let the promise of the future get in the way of the present”

# SOME VERBATIMS



The industry is flummoxed by their inability to understand how consumer media usage is changing.

- *Research Company*



If and when competitive advantages (of having internal systems) flatten out, agencies will then accept a standard metric.

- *Ad Agency Executive*



No one will pay more for improved measurement accuracy. They will pay for improved results.

- *Thought Leader*



Engagement is a buzzword, not a currency.

- *Cable Network Executive*

# CRE NEXT STEPS

- Develop the Research Agenda
- CRE to meet on November 25th to begin to draft an agenda
- First work session to be followed by work sessions with:
  - Nielsen clients who are not currently CRE members
  - Future research management (under 15 years experience)
- Preliminary research agenda mid-late January



**QUESTIONS?**