

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**

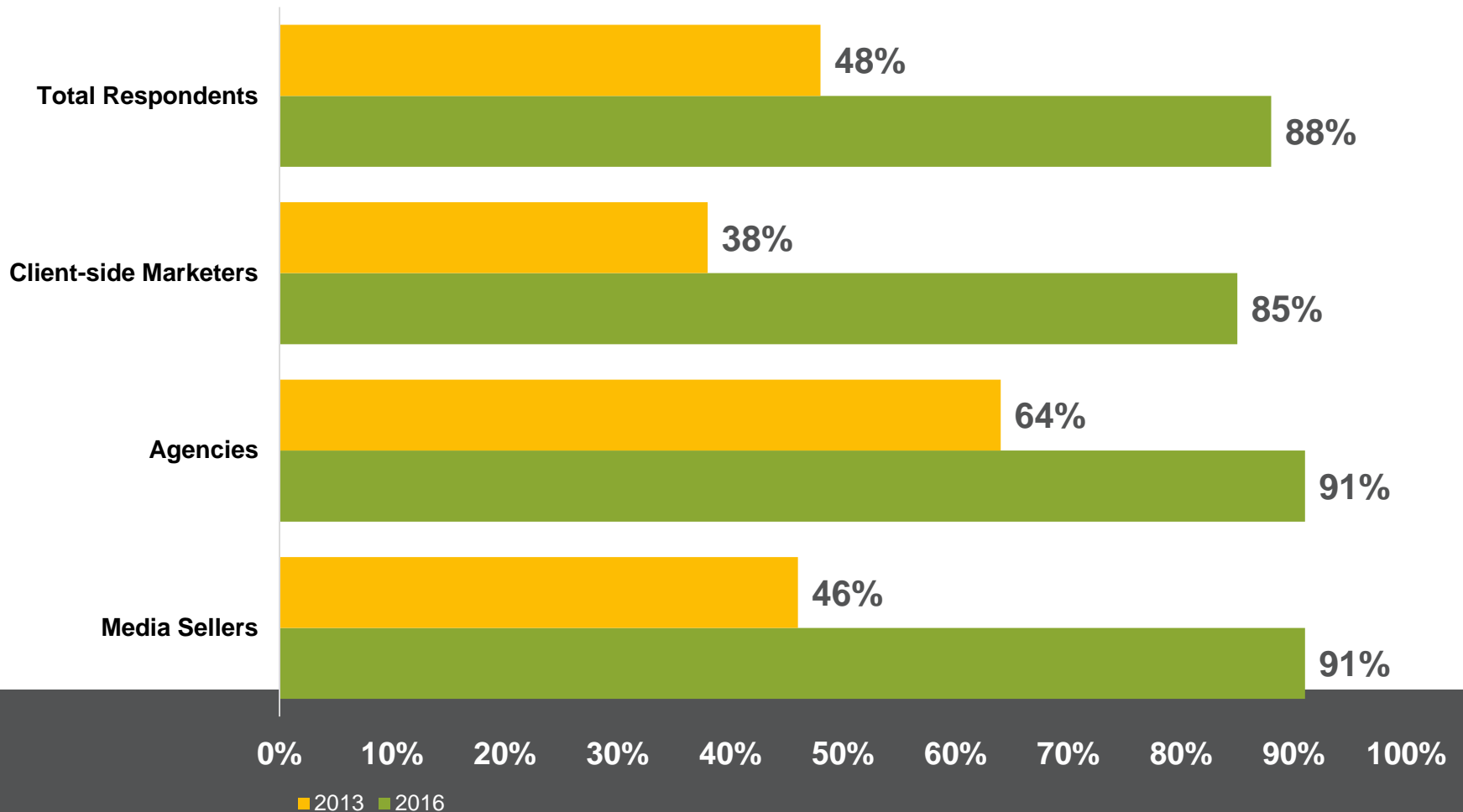
**RICHARD
ZACKON
(FACILITATOR]**

BACKGROUND

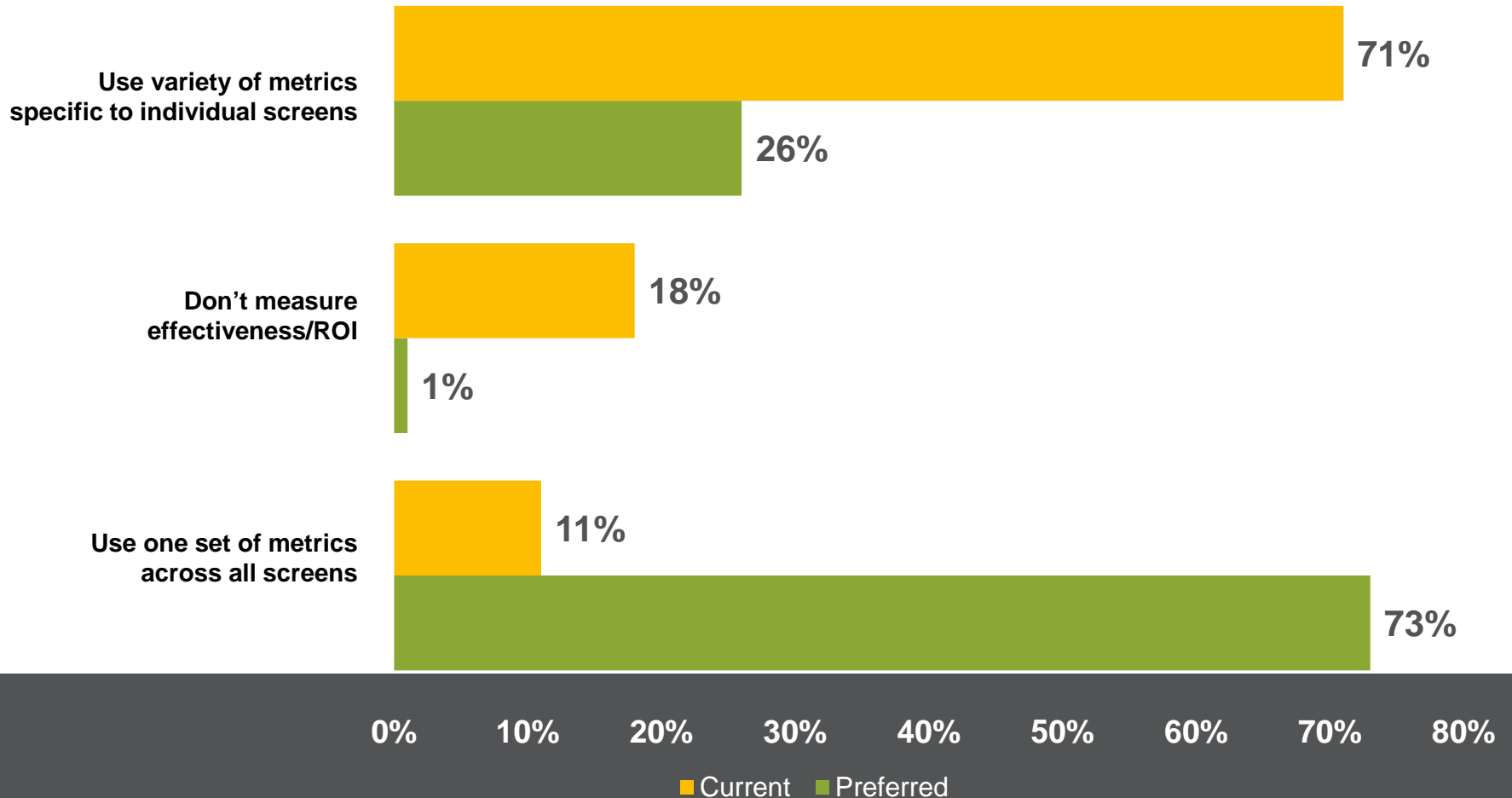
The Media Consumption and Engagement Committee recognized the many efforts to measure exposure across video platforms were making no clear effort to align the metrics across platforms.

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

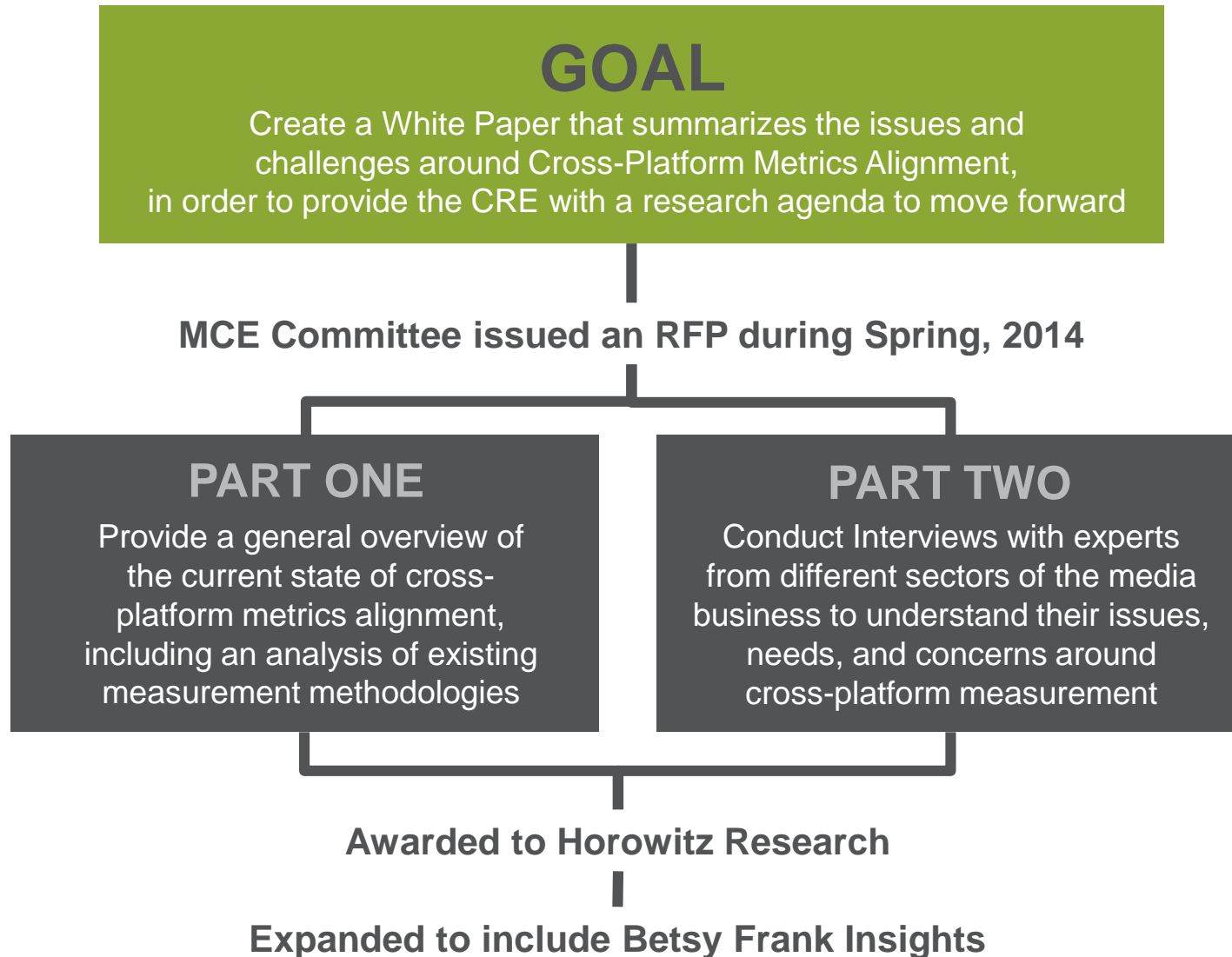
IMPORTANCE OF INTEGRATED MULTI-SCREEN CAMPAIGNS IN DELIVERING MESSAGE (TOP BOX RATINGS ON 5-POINT SCALE [VERY IMPORTANT])



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
HENEHGHEN



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 the word "TREMOR" and a black sans-serif font for the word "VIDEO" below it.

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

Definition

Importance

Issues

PRAGMATIC

Buying and Selling
Challenges

Common Cross-
Platform Metrics

Current Marketplace
Solutions

Methodology

MOVING AHEAD

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?