



Minutes from Quarterly CRE Meeting
December 5, 2013
Concierge Conference Centers
New York, NY

Members In Attendance: Cheryl Brink, Joanne Burns, Michele Buslik, Laura Cowan, Paul Donato, Janice Finkel-Greene, Nancy Gallagher, Janet Gallent, Hadassa Gerber, Tanya Giles, Pat Liguori, Jed Meyer, Dan Murphy, David Poltrack, Beth Rockwood, Ceril Shagrin, Ira Sussman, Robin Thomas and Emily Vanides

Present by Phone: Brad Adgate, Mark Kaline, Billy McDowell, Keenan Pendergrass, Jack Wakshlag, and Sharon Warden

Absent: Artie Bulgrin, Alex Corteselli, Ed Gaffney, Jeffrey Graham, George Ivie, Stacey Schulman and Tom Ziangas

Also Attending: Tom Campo, Laura Carpentier, Lynda Clarizio, Shelley Drasal, Michael Link, Jeremy Stanley, Horst Stipp, Susie Thomas, Richard Zackon

Ceril Shagrin called the meeting to order at 1PM. Ceril then asked members to share accomplishments that they cared about in 2013: personal, professional, and/or CRE. Comments are included in the addendum.

Jeremy Stanley, Collective

Jeremy Stanley of Collective reprised his presentation recently given at the 4A's data summit entitled "The Rise of the Data Scientist." Jeremy reviewed the top challenges facing c-suite marketers, per the CMO study conducted by IBM. At the top of the list was the data explosion, mentioned at 71%. He reviewed the "4 V's" of Big Data -- Volume (exponential growth), Variety (diversity of sources), Velocity (millisecond decisions), and Veracity (varying data quality). He reviewed the growth of audience channels and device choices. Also high on the list of c-suite concerns, at 65%, was growth of channel and device choices.

Jeremy then presented data on the dramatic increase of the term "data science" within the past three years. He described what data scientists do. They work with data; they work with computers and they work with algorithms or mathematical formulae. The algorithms are science behind the data science profession. Data scientists produce visualizations to promote insights and build models to make

predictions. He traced the evolution of data scientists to older disciplines including business analytics, machine learning, and data hacking. He reviewed the demographics of data science and the tools they use. These tools are a state of the art, community supported open source and often require a steep learning curve.

Jeremy listed some critical weaknesses of data science including: seeking what we believe, mistaking noise for real patterns, ignoring unlikely possibilities, and overlooking how the data were collected. He discussed how best to organize data scientists and where to find them.

Finally, Jeremy offered some success criteria including insights, automation of micro decisions, redesigned processes, and the generation of new products or strategies.

Jeremy provided a link to his original presentation <https://vimeo.com/79246674>.

Jeremy discussed with the CRE how data scientists need to work with more traditional researchers, including focus groups and survey sampling.

Meeting with Lynda Clarizio

Ceril reported on a meeting earlier in the week with CRE and Lynda Clarizio, Nielsen's new president US Media Client Services. Lynda will be joining the meeting later in the day, she noted. Ceril stated that she was very impressed with the meeting. After reviewing the history of the CRE, Lynda said that it should not have taken an act of Congress to create the CRE.

CRE Survey

Emily Vanides reported out partial findings from the recent Nielsen Client survey. She reported strong gains in awareness and perception of the quality and value of the CRE.

She also reported the CRE is still receiving low grades in its communication with Nielsen clients. She noted a full report of the survey would be available after the first of the year.

The council discussed and considered sending the project priority list to an expanded group of advertisers.

ROI Committee

Dave Poltrack reported on a successful CRE event in September focused on his committee's studies of Marketing Mix Modeling. The study became a focal point of the ARF meeting the following month. Sequent Partners proposed next steps to the ROI committee after the Holidays.

Steering Committee

Pat Liguori reported that the Steering Committee has been active on a number of issues. First, membership: The Steering committee received three applications for membership from formal members of the Council, all of whom are in new positions. Michael Nathanson has reapplied from Moffett-Nathanson, Bryon Shafer has reapplied from Warner Bros. and Judy Vogel has reapplied from Gannett. The Steering committee had voted to propose all three for membership. Michele Buslik moved to accept Michael, Bryon and Judy and the Council unanimously accepted them. In addition, Susie Thomas, who had been a member from Palisades, has reapplied for membership in her new position at Universal McCann. The Steering Committee is awaiting a statement from her new company endorsing her for membership.

The second issue from Pat was whether and how the radio industry becomes part of the CRE now that Nielsen has purchased Arbitron. A "Meet the CRE" webinar for interested radio researchers was proposed.

The third topic was non-member attendance at CRE events. At the October Local Measurement event, Rentrak made an unauthorized speech. Afterwards, the Steering Committee decided to evaluate attendance of Non-Nielsen clients on a case-by-case basis.

The next item was transparency guidelines: Should meetings be held at which some members are excluded due to competitive situations or concerns. Richard noted that this issue arose recently at a Social Media Committee meeting concerning Twitter and Facebook. The Steering Committee decided to handle this on a case-by-case basis.

The next item was a contribution to the Susan Whiting scholarship fund. Susan, who was responsible for the creation of the CRE in 2005, is retiring from Nielsen. The Steering Committee voted to approve a \$30,000 scholarship funding to her alma mater, Dennison College.

Another request for funds came from the Poynter Institute, seeking a contribution of \$30,000 to help fund a conference. Ceril Shagrin noted that the request was turned down due to concerns of relevance and Nielsen's expectations of no additional spending by the CRE. The question for the Council is, Should an expenditure be made from 2014 funds for the conference in Florida in January? A number of CRE members will be attending the conference, on the "Future of News Audiences." Richard said that he would get out the proposal from Poynter to CRE members.

Ceril noted that \$20,000 was requested through the Steering Committee from 2013 funds to expand research on recruitment of Asian groups beyond Chinese.

Financial

Richard reported out that 2013 spending looks to total \$2.8 million out of \$3.0 million. A final 2013 financial report will be available at the next meeting.

Organization of Research

Richard noted there was a CRE meeting earlier in the day looking at the question of aligning impressions across platforms. In addition, at a recent Insights to Practice meeting, questions arose about classifying TV program genre and defining homes using television (HUT). He went on to say that CRE committees have grown organically without significant thought of how the committees relate to each other. The question for the Council now is What is the right structure to organize our research? There is an additional question of avoiding duplication with non-CRE research, whether at the ARF, MRC, or CIMM.

Emily Vanides put forth a suggestion of increasing the size of the Council to increase committee membership. Richard replied that there are currently a number of open seats on the Council and some current members are not fully participating. He plans to bring this to the Steering Committee. Nancy Gallagher offered that research be project-based rather than committee-based, which would be more fluid. When Nancy's Universe Estimates Committee's work was done, she rolled her committee into the Sample Quality Committee. Jed Meyer supported the flexibility in this alternative approach. Ceril reminded the group that in the earliest days of the CRE, a sub-group met to prioritize some 14 possible projects, and proposed it may be time to do that again. Michele Buslik agreed. Laura Cowan expressed concern about the number of people on some committees. Joanne Burns expressed concern that when a project is complete, a committee simply seeks a new project. Ira Sussman noted that the by-laws require participation on at least one committee. One member pointed out that credit should only be given to active committees. Horst Stipp noted there are similar issues at ARF of being all over the place. It is important to set priorities. Ceril suggested that we bring the issue to the Steering Committee. Richard proposed that we have this meeting in person. Shelley, the coordinator, suggested the term "project team." Hadassa Gerber felt it important to identify only active members of a committee. Richard noted that the Chair is free to remove the names of inactive members. Ceril summarized that the issue will go to the Steering Committee and will be reconsidered at the March meeting.

Lynda Clarizio, President US Media Client Services, Nielsen

Ceril Shagrin introduced Lynda Clarizio, the new President of US Media at Nielsen. Lynda thanked the Council for inviting her and spoke to the meeting earlier in the week with CRE Chairs. She shared a bit of her professional background as an Attorney at AOL and what she learned about consumer behavior. She said she is interested in how the media world evolves to the way audiences are consuming media. She believes that we are at a pivotal point and she is interested in working with the CRE to identify trends not only for Nielsen but also for the whole industry. She described herself as "a bit of a research wonk."

Digital Committee

Ceril Brink stepped up to chair the Digital Research Committee following Bryon Schaefer's departure from Hulu. The committee is pursuing a longitudinal ethnography with GfK to look at viewing across devices. The study will focus 100 representative households across the county. The study will look at special events, sports, news, movies-the whole gamut of programming categories. The committee is working closely with Laura Cowan and a parallel effort by GfK, which is accelerating the adoption of new technologies. Cheryl notes that the research is being conducted without a lot of pre-assumptions. Richard acknowledged Nielsen for its willingness to partner with GfK.

Sample Quality Committee

Ceril reported that her committee has drafted the Insights to Practice Document and will distribute it to her full committee and the Council. There remains the open item of data from Dallas which was not provided because Nielsen is still working on the modeling algorithm. Michael Link committed to get the data to Ceril as soon as possible.

Ceril reported progress on research into recruiting non-English speaking households. She also reported that the committee was beginning discussions on a new type of diary that captures both TV and radio. She said she would follow up with Billy McDowell's committee.

Local Measurement Committee

Billy McDowell began by thanking the Council for its participation in the Local Measurement Mini-Summit. While it did not offer solutions, it increased the understanding of the issues. Billy invited Richard to share some thoughts on Big Data analytics and Local Measurement. Richard spoke to an idea he has been pursuing to help solve the measurement challenges to diary-only markets. The premise is that national people meters from outside markets can be used to help predict ratings in local markets. He reported an upcoming meeting at the NYU Data Science Center to discuss the idea. Perhaps another approach may be a Kaggle competition for predictive analytics. The project is in the nature of a feasibility study to test how accurate predictions can be. He has spoken to Matt O'Grady about the idea as well as others at Nielsen. Billy pointed out that Nielsen has been looking at set top box data to improve local measurement. Richard noted that he would look to include set top box data as well in the approach he is pursuing. Cheryl Brink suggested that online data might be included.

Big Data Committee

In the absence of Stacey Shulman, Richard reported on two Committee projects. The Committee will seek an email vote on a proposal to complete a primer on Big Data. The cost is estimated at \$50,000. Second, the committee is looking to host an event for Nielsen clients on January 21st about Big Data and its relation to survey sampling. Paul Donato expressed interest in speaking at the event but stated that he

will be traveling then. Richard replied that the committee would look for a new date when Paul can be available.

Media Consumption & Engagement Committee

Laura reported that she had given the Mobile presentation to group of market researchers in Nashville in October. The committee is currently working with Insights to Practice to close out the project. Separately, the team is working on the acceleration ethnography with GfK and recruitment is ahead of schedule. Finally, the committee has its first open meeting looking at aligning impressions across platforms. Cheryl Brink, who was at that session, saw great value in being apart of the Ideation process.

Return Path Measurement

Pat Liguori announced an upcoming meeting with Kantar on their new Return Path Measurement service. In addition, the committee is awaiting delivery of the latest PTI subscriber report. This report will be shared with the Committee and the Council.

Commercial Pod Length

Hadassa Gerber reported that the Committee had put together an RFP. The committee is considering the impact of pod length across platforms on attention and recall. Cheryl Brink asked about controlling other variables in digital, in particular VOD. Hadassa replied the study will consider many variables but intends to start small. Hadassa has indicated that she has received work that Jack Wakshlag and Stacey Shulman have done on the project.

Social Media Committee

Beth Rockwood reported a busy quarter on the Social Media front. The committee now includes representative from Twitter and Facebook. Beth is interested in having more contributions from Facebook than in the past. Now that the Twitter IPO is complete, it will be easier for this to occur. A subcommittee led by Emily Vanides will be looking at Social Media and Advertising. Emily spoke to the big question of the impact of social media on purchase. She has gotten input from Dave Poltrack. There are many considerations of earned, owned, and paid advertising. A project may be ready to execute in 2014. Horst said he would send Emily a study on the topic.

Beth reported that she delivered another presentation of the original study in Nashville. In addition, she submitted a proposal to the ARF conference in 2014 for the new study. She then provided some top line results from the new study. The sample was a little over 1700 with a higher percentage of super connectors than in the first study. The new study is three weeks in length where the first study was one week. An initial report will be delivered to the committee by Keller Fay in January. Overall, we are quite pleased with the results that we have seen. Overall, Beth concluded the results show significant increase in social media discussions of television.

Insights to Practice

Nancy Gallagher said that the Insights to Practice process for Social Media and TV Untethered (Mobile) are complete. At the Insights to Practice meeting, the issue of a possible new definition for the term “homes using television” arose. The definition would help align national and local. Also the idea of Nielsen more formally sharing mobile measurement strategies was discussed. Issues of standardizing TV Program Genre were also discussed. Jack Wakshlag referred to a study on genre that had been presented at a Nielsen annual meeting.

Nancy Gallagher requested that the next Insights to Practice meeting occur the morning of the next CRE quarterly meeting on March 13, 2014 to avoid conflict.

Communications

Emily Vanides reported that the CRE has over 500 LinkedIn members and is up to 564 subscriber to the Newsletter. We believe that these increases have come due to the recent events, which included Marketing Mix Modeling in September and Local Measurement in October. Tom Campo reviewed press coverage of CRE news and guest columns. Emily repeated a request for members to provide us with dates of industry conferences. Billy McDowell noted that Nielsen maintained such a calendar.

Education Committee

Jed Meyer reported progress on the Education Committee. Jed drew attention to emails that Council members have received from Gary Corbitt on an effort on *Growing the Media Research Profession*. We would like to have Gary keep a database of professors and researchers who would be interested in having contact. Jed invited members who are interested in adopting a school to contact him directly (Jed.Meyer@annalect.com). Jed is also asking CRE members to reach out to younger people on their staffs to participate in his committee.

The Committee is segmenting media researchers into three groups: beginners (people in high school or college interested in media research), intermediates (early in their research career), and advanced (those in the profession for a while). The idea is to create opportunities for learning and connecting at each stage. Finally, Jed thanked the CRE for funding the scholarship in Susan Whiting’s name. Joanne Burns asked if there is a way to funnel people looking to get into the business. Jed said send the names to him. His committee is not looking to do their work on an island but in partnerships with ARF and other industry organizations. Ceril suggested that Jed put something out for the members to help them participate better. Jed agreed.

Steering Elections

Richard reminded the Council that, at the December annual meeting, the Council reelects its officers. Cheryl Brink nominated Ceril Shagrin to continue at Chair. She was elected unanimously with no objection.

Research Committee Chairs are selected by their Committees and this should occur over the next couple of months. The eleven seats on the Steering Committee, however, are elected by the full Council. Eight current members seek re-election: Brad Adgate, Michele Buslik, Laura Cowan, Nancy Gallagher, Tanya Giles, Pat Liguori, Ceril Shagrin and Ira Sussman. There are three additional slots available. Janice Finkel-Greene, Jed Meyer and Robin Thomas volunteered. The slate of eleven were all elected unopposed.

New Business

Richard put forth the CRE quarterly meeting dates for 2014: Thursday March 13th, Wednesday June 11th, Thursday September 11th, and Thursday December 11th. Ceril brought up the possibility of additional spending in the year of 2014 to study ethnic recruitment. She and Michael Link said they would get together to draft a proposal that the Council will vote on by email. Nielsen was not yet prepared to announce CRE funding for 2014. Ceril Shagrin then raised the request from the Poynter Institute to co-fund a conference in January for \$30,000. Ceril promised to distribute the formal proposal from Poynter and it would count toward 2014 funds. Ira Sussman reminded the Council that the overall Council budget is \$3.0 million and the Council can allocate funds as it sees fit between admin and research. Pat Liguori raised the question of audio (radio) coming within the scope of the Council. Richard reminded the Council that we would schedule a "Meet the CRE" for the radio community. Lynda Clarizio noted that radio has unique research questions as a world unto itself. Sharon Warden noted that she can bring the topic of CRE participation up at NAB's Local Audience Measurement Committee.

Richard thanked Lynda for joining us today and congratulated the Council on a great year.

Ceril adjourned the meeting at 4:36 PM.

Addendum:

Ceril began by stating that one of the things that she thinks about when she looks back on 2013 is all that the CRE accomplishes as a group. She also stated that there is no organization that she feels accomplishes more than what this group does collectively year after year, and that she is proud to be part of the CRE. She then gave others the opportunity to share some accomplishment, whether it be personal, business or professional. Responses included:

- I am thankful this year and have learned patience personally and professionally.
- I echo what was just said.
- I appreciate the CRE, and one of the things that I've become more active in with the CRE is the Pod Length Committee.
- I'm particularly happy with the way the push toward automation at my company has meshed beautifully with the Big Data Committee and the Local Measurement Committee at the CRE.
- I'm proud of the efforts with Viewable Impressions as part of 3MS and of introducing standards for quality with digital audience measurement.
- I'm pleased with the attention that measurement gets now in my company and others'.
- I'm really proud of the productivity that the Media Consumption & Engagement Committee has had this year: great mobile research and an acceleration project that is going ahead of schedule.
- I'm very proud to be sitting here today as a guest and for my increasing exposure to the CRE throughout this year.
- I think there is so much going on in the industry and at Nielsen today and I'm proud to be kind of at the middle of a lot of change in the industry and driving some programs forward.
- I am proud to continue to be gainfully employed -- serious, very serious, given the environment and what has transpired at several media companies.
- I'm proud of the events that the Communications Committee has put on to showcase the work the CRE is doing. And I am proud that I climbed, I hiked Mt. Washington this past summer.

- I'm proud of the results that you're going to see of the client survey that was conducted, about how the CRE is doing.
- I'm proud of the research team that we're building at my agency. We've added about five or six people to the team.
- I'm happy that I'm gainfully employed, seeing that I was one of the casualties from the events of some of the media companies this year. And I love where I've landed.
- I'm proud I made five hires of people who have very unique talents, natural language processing, image processing, pattern recognition. We're working on fun stuff which you'll be talking about in about two years.
- I am proud of really working hard this year to get the insights out of my team and into the organization.
- I am proud to be the new liaison to the CRE. I am out of retirement and I just love this business and all its changes.
- I actually held two Insights to Practice sessions and believe me, it is a cat-herding exercise that is not easy.
- I'm proud to be here. Things like this used to make me very, very nervous to speak and I found that I'm not nervous speaking up here. I think it's a testament to the people in the room and the way this Committee is run.
- I'm proud I lost 10 pounds and I'm really proud of all of the committees that I'm on and how hard and dedicated people are, and they inspire me to work even harder.
- First, I'm proud to have been invited here to speak to such an esteemed group of leaders in research in analytics.
- I'm proud of hiring some really good talent in a very competitive market.
- I'm particularly proud this year because I think that, through collaboration with people in the industry from the MSO side, that we have created an entire new, exciting, video-on-demand marketplace that is going to transform our business. And on the CRE side, I'm even prouder of, after 20 years of bitching and moaning about marketing share models and marketing mix models, we created momentum to solve these problems. That really shows the leadership that comes out of the CRE.

- Yes. I'm proud of the work done by the CRE, the committees I've been on that are doing some exciting work and getting a lot of press and a lot of people showing up at these events.
- I'm proud of the Local Measurement Summit that we put on in October, It was a great event and greatly attended.
- I was pushing for Nielsen to review the definition of a black household and in this last PGC meeting they agreed to do so. I'm proud of that. And I'm also proud of the fact that my wife and I adopted an 18-month old little boy in October.
- I'm proud of the data that I get that shows that I have a group of people who love to work here. And I'm proud of the fact that my son got married in October.
- I'm proud of something more personal, related to my job of completing two studies that hadn't been conducted for several years because of the effort involved.
- I'm proud of chairing this very august Council and having the opportunity to work with all of you. And I'm proud of having been recognized by the MRC for innovation.
- I'm actually very proud to have been elected by my colleagues in the industry to be the incoming president for the American Association for Public Opinion Research or AAPOR.