

Minutes from Quarterly CRE Meeting  
June 12, 2013  
Concierge Conference Centers  
New York, NY

Members In Attendance: Brad Adgate, Cheryl Brink, Michele Buslik, Laura Cowan, Janice Finkel-Greene, Ed Gaffney, Nancy Gallagher, Hadassa Gerber, Tanya Giles, Mark Kaline, Pat Liguori, Billy McDowell, Jed Meyer, Dan Murphy, Dave Poltrack, Bryon Schafer, Ceril Shagrin, Ira Sussman, Robin Thomas, Judy Vogel, Jack Wakshlag, Tom Ziangas

Present by Phone: JoAnne Burns, Alex Corteselli, Janet Gallent, Michael Nathanson, Keenan Pendergrass, Beth Rockwood, Stacey Schulman, Kate Sirkin, Emily Vanides, Sharon Warden

Absent: Paul Donato, George Ivie

Also Attending: Tom Campo, Shelley Drasal, Michael Link, Roger Neal, Matt O'Grady, D Sangeeta, Richard Zackon

Ceril Shagrin called the meeting to order at 1pm. Committee chairs gave quick updates on committee activities to provide an overview for guests.

### **Roger Neal, NYC Media Lab**

NYC Media Lab was created by the City to help connect the academic sector with digital media companies. The goal is to develop the ideas, the IP and the talent to be competitive in the current tumultuous environment.

Members were encouraged to consider possible projects for collaboration either through CRE or their own companies. CRE members were also invited to the Annual Research Summit to be held at the Hearst Corp. on September 19<sup>th</sup> with presentations by leading researchers in the city on digital media. Roger's email is [roger.neal@nycmedialab.org](mailto:roger.neal@nycmedialab.org)

### **D Sangeeta, Global Head & EVP, Measurement Science**

Sangeeta, who has been in her role for less than a year, addressed vision and the changing culture at Nielsen. Measurement Science (MSci) is at the heart and soul of the company. Vision is focused on (1) developing robust and sustainable methodologies, (2) innovation and (3) talent. MSci is responsible for sample design and algorithms for ratings and market share.

In response to Dave Poltrack, Sangeeta said at a future meeting we can expect a discussion of analytics versus traditional media research. Pat Liguori asked how new talent processes translate to client level. Sangeeta assured her the majority of the work will benefit clients and that clients will be delighted.

Three pillars of Measurement Science are Client Engagement, Innovation/ Methodology and Standards. Janice Finkel-Greene

raised concerns about standards regarding use of data and Ceril Shagrin asked accuracy be as important as timely delivery. Sangeeta addressed improvements in both areas. Ira Sussman noted that the marketplace determines usage. Cheryl Brink asked for greater dialogue between clients and MSci about data. Sangeeta agreed about the importance of client collaboration regarding innovation. Brad Adgate requested more education for younger researchers. Richard Zackon noted this may be something for the education committee.

Sangeeta spoke of strengthening and protecting the integrity of Nielsen's brand globally by assuring that all products adhere to critical methodological and quality standards that reflect client requirements. External collaboration is an area of importance to Nielsen.

Michael Link spoke to industry and academic collaboration to support Nielsen in learning what's going on and for talent recruitment. Internships are an important component. The effort is global. There is also a pro-active competitive effort called "Shark Tank" to accelerate innovation. There is also an academic-like Fellows Program.

Ceril asked about relationship with engineering and Sangeeta said MSci was joined at the hip with the engineers.

### **Research Discussion: New Project Ideas from Last Meeting**

A list of possible new projects was presented at the March meeting by Michael Link. These ideas were:

1. A standardized metric for ad effectiveness for comparison across various different platforms.
2. Privacy: How do we know really where that line is in terms of what people are willing to do and not willing to do?
3. The limits of compliance and representativeness when metering many devices in the household.
4. How is the social connection driving viewing behavior?
5. How can we find better, less costly ways of panel recruitment?
6. Leveraging location information into meaningful metrics.
7. Passive measurement techniques utilizing big data with different types of monitors and meters.
8. How good are online panels: Can we develop some type of panel worthiness score?
9. Device sharing and viewing behavior.

Michael felt the privacy issue was particularly ripe. There was discussion of items #1 and #2 above with particular interest in comparing impressions across platforms. Michele Buslik raised the issue of the new Nielsen Twitter ratings. The Council wanted to hear from Paul Donato about incorporating social media into TV measurement. Janice Finkel-Greene was concerned with local measurement impressions versus ratings. Ceril distinguished the business from the methodology issues in this regard.

Bryon Schafer stressed the importance of measuring video across new technologies. Hadassa Gerber expressed interest in the effects of commercial pod length. Hadassa stepped up to lead an inquiry into pod length effects. Pat Liguori agreed to lead a discussion of impressions cross-platform. No one stepped up to lead a discussion on privacy and David Poltrack questioned whether CRE is the right venue for that inquiry at this time. Ceril suggested NYC Media Lab might look at it.

## **Sample Quality – Ceril Shagrin**

Ceril said some of the analysis of the current study is complete. Data on media-related variables, viewing in non-TV households and a number of weighting algorithms have been tested. Some of these weighting algorithms remain to be verified by RTI, our research partner. RTI replaced Ernst & Young due to a conflict. Use of return path data has been delayed due to data issues with Kantar. We also found issues in some simulated code reader data and Nielsen agreed that they needed to do some additional work on their modeling.

Unfortunately, Michael Link informed us that they were not going to provide anymore of the data to us but rather would provide to the MRC technical committee. Ceril reported being quite angry and disappointed at this development which hurts the partnership between Nielsen and CRE. Nielsen will re-analyze the data after its work with the MRC, probably months in the future. We invited Matt O’Grady of Nielsen to the meeting.

Matt apologized on behalf of Nielsen and explained that CRE was ahead of Nielsen in this research which in its early stages. He promised the data would not be withheld. Ceril noted it was not a test of the meter, just the model and she believed there was learning lost due to Nielsen’s decision. Pat Liguori commented this was the second return path data study for which Nielsen had not delivered data. Matt O’Grady distinguished developing projects at Nielsen which are moving targets and associated multiple flows of data. Pat stressed the need to be informed of the status of plans. Sangeeta spoke of balancing transparency and flexibility. Dave Poltrack

emphasized the value of having direction of CRE while Nielsen is developing an innovative work in progress. We have to figure out a way to make this work in a fast moving world

Richard suggested the Steering Committee consider a set of guideline when working with Nielsen in the moving target of an R&D environment. Sangeeta acknowledged that Nielsen made the mistake of saying the algorithm was done. Laura Cowan asked for better communication from Nielsen regarding development status. Jack Wakshlag questioned whether CRE should consider these types of projects and said it was an appropriate question for the Steering Committee. Michael Link suggested that CRE projects be part of an overall roadmap at Nielsen rather than as a separate project.

### **Steering Committee**

Pat Liguori reported that the Steering Committee was recommending that Mark Kaline from Kimberly Clark be reinstated on the CRE and that Robin Thomas, who had left ABC and was now with Tribune, be admitted in this new capacity. Also Jeffrey Graham who was with Twitter was recommended for membership by the Steering Committee. Paul Hockenbury from Comcast who had applied for the half-seat formerly held by Bob Ivins was not recommended at this time but he was invited to join a CRE committee so members might get to know him better.

Mark Kaline, Robin Thomas and Jeffrey Graham were all voted in as members without objection.

Richard noted it has been tough securing continued cooperation from advertisers in the CRE and suggested maybe we create a seat for the ANA. Mark Kaline who chairs the ANA leadership committee said he would get CRE a spot on the agenda at the next committee meeting as advertisers don't know much about CRE. Dave Poltrack felt working advertiser were preferable to ANA surrogates. Jack Wakshlag noted that media companies are also themselves big advertisers.

Pat mentioned that the Steering Committee addressed the question whether a committee member could be chair without holding a seat on the full Council. Emily Vanides felt the issue worthy of more consideration

### **Treasurer Report, Michael Nathanson**

Michael reported we have spent about \$600,000 to date. Richard suggested committees start think about a two year spending horizon and Michael agreed. Ira Sussman encouraged committees think about pacing projects in time. Jack Wakshlag reminded Nielsen that Paul Donato said he would address the concern of providing Wall Street companies appropriate data such as C3 ratings. Sangeeta asked Ira if he could take the issue back to Mitch Barns. Tom Ziangas proposed Nielsen provide more template-based reporting rather than data dumps. Richard said he would follow up.

### **Media Consumption and Engagement – Joanne Burns and Laura Cowan**

Laura reported the industry response to the ARF presentation was strong. The qualitative research is complete and will be reported out with the quantitative data at an industry breakfast on July 24.

Richard acknowledged Laura and Chris Neal for their ARF presentation.

### **ROI – Dave Poltrack**

Dave Poltrack reported that the Marketing Mix Modeling report was presented at the ARF by Jim Spaeth and Alice Sylvester. It was presented to the CRE prior to the event. The conclusion of the study is that this area requires a lot of work, primarily because of changes in the industry in terms of media and data availability. It is not so clear what the CRE does next because of Nielsen's position in the modeling marketplace. A breakfast on September 20 is scheduled to present the findings beyond what had been presented at ARF and will include ANA, 4A's and ARF.

Richard noted the presentation at the ARF was standing room only.

### **Local Measurement – Billy McDowell**

Billy reported BIA Kelsey is pouring through the local data we provided to them and we expect results by the end of June. He also reported a study he and Raycom recently conducted with Michael Link, of students at the University of Alabama using the *What You're Watching* app to record viewing. He looks forward to sharing the results with the CRE.

## **Digital Research – Bryon Schafer**

Bryon shared that, tomorrow, the Digital committee will receive a first look from Nielsen NeuroFocus of an exploratory analysis comparing EEG and eye tracking measures of consumers looking at video advertising on television and laptop. We could not track other platforms. Gerard Broussard has completed a 25-page white paper for us that examines literature and recent initiatives in viewable digital impressions as well as other media. The digital committee has put out an RFP for a longitudinal ethnographic study. Anticipated cost around a million dollars.

Jack Wakshlag suggested including MC&E committee in these discussions and Bryon assured him that was already happening.

## **Insights to Practice – Nancy Gallagher.**

Nancy Gallagher began by noting several research projects have closed so committee chairs will be asked to schedule the process of meetings with Nielsen about the findings. She asked Nielsen whether an all-day meeting or separate meetings are preferable. Michael Link preferred an all-day meeting. Nancy asked for the right Nielsen participants and that they come prepared

Nancy said Pat McDonough would assist in finding physical space for CRE studies. She also spoke of Gary Corbitt's interest in CRE studies for educational use. Sharon Warden thought it was a great idea for the education committee.

### **Big Data – Stacey Shulman**

Stacey Schulman noted CRE has already conducted some “big data” research as part of its studies and these should be highlighted.

Richard noted the Treenet work on the Mobile study and the Bayesian analysis of the Social Media study.

Janice Finkel-Greene asked for a definition of big data. Richard promised to send out a reference to a new text on the Big Data Revolution. Janice asked what the tools and skills are. She subsequently volunteered for the committee.

### **Social Media – Beth Rockwood**

Beth Rockwood updated the Council on status: the academic team produced some interesting insights, the ARF presentation went well earlier in the month and the plans for the full industry lunch on June 25 are on track. The presentation is on the CRE website.

Beth proposed a second study for the new fall TV season, again working the Keller Fay and Nielsen. New programming will be the focus and sports programming will be included this time. 200 respondents from the Nielsen Convergence Panel will be included. The survey will be for three weeks compared to one week last time. The cost is just over \$800,000 + 10% contingency.

Michael Link asked who was handling the Convergence Panel and Beth answered Karen Benzra and Brian Fuhrer. Dan Murphy was concerned whether the price would allow for other projects. Richard

noted there was about \$2 million available and Ceril added there were no competing proposals just now. Robin Thomas asked about pre-paying for some work and Ira Sussman responded that spending must be matched with deliverables. Cheryl Brink asked about analyzing secondary effects and Beth said she would speak to the academic team. Ira Sussman asked whether the data from Blue Fin and Nielsen was all used in the first study and Beth assured him the academics used it.

A motion for the spending was made, seconded and agreed to by the Council. (Note: Sangeeta, who does not have a vote, seconded the proposal)

Ceril noted that some of the research would be presented by one of the academics at the President's Conference taking place in Israel.

### **Communications Committee – Emily Vanides**

Emily Vanides reported the LinkedIn group is up to 350 members and the newsletter to 400 subscribers. We have begun using Twitter. We're using Richard more as a point of contact as recommended by PR consultant Mark Braff. The newsletter is now being published bi-monthly instead of quarterly.

Tom Campo noted the viral pick-up our recent releases in Variety and AdWeek got. Emily spoke to upcoming events for Social, Mobile and ROI.

Richard acknowledged Emily for her incredible work. Ceril acknowledged Tom Campo for his weekly news clips

### **New Business.**

Ceril mentioned the possibility of a Town Hall at Nielsen's Oldsmar facilities and Sangeeta said it was a good idea.

Richard asked Sangeeta her response to her first meeting. She replied she learned a lot, found the discussions invigorating and enjoyed the day. She thought CRE should be more visible within Nielsen. She thanked the Council for the invite. Richard thanked Sangeeta and Nielsen, acknowledging some tough issues were discussed.

### **Adjournment**

The meeting was adjourned at 4:36 p.m.