

Minutes from Quarterly CRE Meeting
June 10, 2015
Convene Conference Centers
New York, NY



Members in Attendance: Joe Abruzzo, Brad Adgate, Kathleen Bohan, Cheryl Brink, Joanne Burns, Janice Finkel-Greene, Nancy Gallagher, Janet Gallent, Hadassa Gerber, Buzz Knight, Pat Liguori, Billy McDowell, John McMorrow, Jed Meyer, Dave Poltrack, Beth Rockwood, Stacey Schulman, Ceril Shagrin, Howard Shimmel, Tom Ziangas

Present by Phone: Artie Bulgrin, Tanya Giles, Jeffrey Graham, George Ivie, Tony Marinaro, Keenan Pendergrass, Andy Rainey, Bryon Schafer (Bridge Member), Robin Thomas

Also Attending: Mark Braff, Tom Campo, Shelley Drasal (by phone), Sara Erichson, Mark Kaline (by phone), Diane Laura, Christine Pierce, Horst Stipp, Richard Zackon

Absent: Paul Donato, Ira Sussman

Opening

Ceril Shagrin called the meeting to order at 1:05 PM by requesting that each person state their name along with a message that they would give someone just starting out in the business. Those comments are included in the addendum.

A Look Back to 2005

Richard shared the top research projects dating back to July 2005:

1. Media consumption – short-term - Who, what, where, when, why, how
2. Emerging technology – long-term - DVR, gaming, TiVo to Go, cell phones
3. Non-response – (including incentives testing)
4. Commercial impact – program environment, commercial avoidance
5. Local measurement – electronic, relation to national, does it work?
6. Proper data use – responsible use
7. Complete measurement – out-of-home, single source, Apollo
8. Subgroups – micro targets (ex: age 12-24 in urban mkts); Ind. UE study – population estimates
9. New metrics and reporting - going beyond age/sex demo, beyond audience counting (program env't and purchase behavior), psychographics
10. Sample – short-term – quality, improvements in faulting; long term – revolutionize, “big change” (ex: people based vs. HH based)
11. Measurement technology – PPMs, passive meter, set top box
12. Modeling
13. Creative – out-of-the-box research idea(s)

Ceril says it sends a strong message that we have to continually monitor these same areas and make sure that the research that covers them is as good as it can be.

Nielsen R&D Update

Christine Pierce began by saying she had just attended the Insights to Practice meeting this morning and heard the request that Nielsen share more about what their research needs are.

She provided a very brief update on the TV rating enhancement initiatives. She noted that impact data has already been delivered for National panel expansion and validation data has been delivered for Local Viewer Assignment. Coming soon will be local viewer assignment impact data. She also reported that there has been a pause in rating stabilization and it would not launch in 2015. Details on all of this has been shared at MRC and Non-CRE Nielsen committee meetings.

Christine moved on to Nielsen research priorities, 2015 and beyond. She spoke about Nielsen total audience, which applies to audio, video and text. It includes both ad content and platforms including TV, OTT (Over the Top), PC, Mobile, Consoles, Tablets, Radio, and Newspapers. Measurement will be conducted to account for duplication.

She reported a shift at Nielsen from panels-only to panels plus census (or Big Data) measurement. She summarized as follows: Panel Only: 1) Sample & Recruit People, 2) Directly Measure Sample of People, 3) Weight & Project Sample of People, 4) Calculate & Report vs Panel plus Census: 1) Collect Data From Devices/Servers, 2) Assign/Model Demos & Characteristics, 3) Calibrate Big Data w/ Panel Truth Set, and 4) Integrate, Calculate & Report.

Stability comes from Census/Organic – Accuracy from Panel/Designed Data. She emphasized that panels remain a source of calibration: a truth source. Howard Shimmel asked if, going forward, Nielsen would look more holistically at survey representativeness to avoid problems such as kids and OCR. Christine assured Howard that that was the intent. Christine added that there are conversations now happening at Nielsen that were not happening five years ago.

Ceril Shagrin noted that there will now be modeled data in the national panel. Christine responded that Nielsen needs to be careful to model from a truth set in order to get the right composition. This will not happen soon. They are looking to the future and requesting that clients work with Nielsen in the process. Christine suggested evaluating the validity of third party demographic data. Nielsen also realizes that we need low-burden cross platform measurement. One of the issues involved would be deduplication of viewership. There is a lot of room for innovation in this space.

Beth Rockwood asked whether Nielsen could get library VOD from panels. Christine acknowledged that is the sort of granular measurement that may need to be integrated with a Big Data source. Horst Stipp said there may be some global solutions worth considering and Christine agrees. Dave Poltrack said it would be helpful for Nielsen to present how its relationships with Adobe, FreeWheel and Facebook can help its clients: what Nielsen expects to get from these deals and how Nielsen ensures data integrity and quality control. Ceril said it would be helpful to do that in our September meeting. Sara Erichson agreed.

Beth Rockwood suggested putting together a broad scale survey instrument, fielded frequently to check on rapidly changing metrics. Ceril suggested that if members have questions for Christine, they should send them to her and copy Richard and Shelley. This will serve as input for the September meeting.

Steering Committee

Pat Liguori shared that the Steering Committee had a conference call on May 28th. She made note that the quarter was slow, but that the committee unanimously decided to terminate one member due to non-participation.

The Council currently consists of thirty members, which includes Agency (4), Network (4), Trade (3), Digital (1), Local (8), Syndication (1), Cable (6), Radio (1) and Nielsen (2)

The Council will continue to look at ways to recruit membership.

Insights to Practice

Nancy Gallagher reported on a meeting held earlier in the day, which included chairs of all committees along with some Nielsen representatives. The discussion focused on improving the process of getting results to Nielsen and working with Nielsen to act on those results and report back to the CRE.

Christine Pierce said Nielsen would take ownership in the future in response to particular studies. She was pleased with the selection of studies the CRE is making. She said it is up to Nielsen to ensure that we are communicating the results of the study and how we use them. Christine also offered to have discussions with her people regarding their participation with the CRE. Further, she said Nielsen will document the CRE historical results and how they have actually been used. Finally, Nielsen will create an internal committee to provide greater visibility and explore wider application of CRE studies.

Ceril Shagrin commented that she was very optimistic as a result of the meeting and that a report would be made at the September meeting in regard to the new process.

CRE Finances

Richard Zackon reminded the Council that Nielsen has funded it with \$3 million for the year, of which \$1.9 million remains available to fund new research.

New Research Proposals

Platform Valuation, Joe Abruzzo

Joe Abruzzo reminded the Council of the study's industry interviews, conducted last year, concerning the alignment of cross platform metrics. The Media Consumption & Engagement committee issued an RFP on April 6, 2015 on one of the topics, the value of individual platforms. The issue goes to combining and comparing impressions in three basic areas: emotional reaction, retention and recall, and engagement. The committee received eight proposals and is recommending one from a company called Hub Research. The proposal contained a quantitative survey and neurometric research; only the survey research is being recommended today. The committee needs to do more work before addressing the neurometric/biometric portion. Two thousand respondents will be recruited to view particular programs and to be surveyed after their viewing experience. There are four hundred in each of five cells: live TV, time shifted TV, PC, tablets, and smartphones. The cost is \$115,600. The research is intended to benefit advertisers, networks, and Nielsen. Copies of the proposal were circulated.

Howard Shimmel noted that Turner recently conducted some biometric research, which the committee may wish to review before its second phase. Horst Stipp volunteered to work with the committee when it addresses neuro and biometric research. Christine Pierce asked whether this would help understand co-viewing across device types. Joe said it would. Beth Rockwood asked whether the creative would be identical across screens and Joe said the advertising will be the same. Ceril Shagrin noted it is a complex project from which we learn a lot. Richard added that it is our first investigation and not the last word on the project.

Joe formally requested that the Council vote the funds. It passed with one member abstaining and one member opposing. Richard Zackon also noted that the MC&E Committee is also making progress on the cross platform matrix of audience metrics. Reggie Shah has been leading that effort.

Concurrent Screen Usage, Janet Gallent

Janet Gallent began with the big picture objectives of the proposed study: How much concurrent platform usage is taking place? What are the key demographic, geographic, and temporal patterns? And What are the typical combinations of concurrent platforms? In addition, the project will look at individual behaviors, group dynamics, and the impact concurrent platform usage has on consumer experience on content and advertising. The study is past day self-reported behavior. Janet's committee recommended a proposal from GfK, which they deemed to be the best of ten that they received in response to an RFP. There is a large quantitative analysis using multimedia mentor (A 13+) and a qualitative deep dive of one hundred concurrent platform users on that study. The study is to be completed in the calendar year 2015 at a cost of \$525,000.

In response to a question about integrating with MRI, Janet said she would follow up. Horst Stipp suggested the use of bio and neurometrics. Janet responded that the committee considered that but it was incredibly expensive. Pat Liguori wondered if there was overlap with the platform valuation study. Janet replied that there was insufficient overlap of the research question. Howard Shimmel noted that major events might be viewed differently from typical viewing and Janet agreed. Cheryl Brink was concerned that concurrent usage may not be top of mind a day later. Beth Rockwood encouraged the committee to retain a large sample size to break down into smaller generational and other groups.

A motion for \$525,000 was made, seconded and approved. Richard acknowledged Janet, Joe and their committees for their hard and thoughtful work.

Audio, Buzz Knight

Buzz Knight shared that there were two new members of the Audio committee: Oscar Taylor (Annalect) and Pierre Bouvard (Cumulus). Buzz presented a proposal recommended by the Audio Committee designed to evolve Nielsen Audio service in Small & Medium markets. The proposal leverages separate Radio, TV and qualitative samples with the instrument being personal diaries. The benefits will be a larger, more affordable sample and multi-media measurement. The radio and TV components will be fielded one month apart concurrent with traditional radio and TV diary measurement. Research questions include what percent of respondents will complete both diaries and does the order of the survey impact usage? Test markets will be Bakersfield, CA and Charlottesville, VA. The study will take place in the first week of October, November and December 2015 at a cost of \$227,600. Christine Pierce said the cost would apply to 2015. The research will be conducted by Nielsen. Hadassa Gerber asked for confirmation that the timing was consistent with the regular diary services and Buzz assured her that it was. Billy McDowell acknowledged Buzz for proposing a study that valuable for both Radio and TV. In response to a question from Brad Adgate, Buzz stated that the study did not have a streaming component.

Buzz moved that the CRE approve the spending and it was approved without objection. Buzz acknowledged Nielsen for its collaboration on a complex project.

Validation White Paper, Ceril Shagrin

Ceril Shagrin, in her role as Chair of the Data Quality committee, submitted a request for \$60,000 to hire an expert to produce a general guide to help researchers evaluate the quality of data derived from new ways of collection or modeled from existing sources. The goal is to hold an event on validation and data modeling later in the year. Richard notes that in this case, we are seeking the funds before we have the vendor, and an RFP will follow shortly. The amount of \$60,000 is based on previous similar proposals. The request for funds was seconded and approved without opposition.

Committee Updates

Education Committee

Jed Meyer provided an update on the recent events held by the Education Committee, which included a panel discussion called The Power of Women in Research and Advertising on May 27th. Amongst the panelist were Lynda Clarizio and Ceril Shagrin. Jed indicated it was a great night and those in attendance agreed.

There was a separate event on June 8th, a young career event for MAIP interns entitled exposing research in the early career. The education committee is looking for ongoing ideas to reach professionals early in their career.

Local Measurement

Billy McDowell reported that his committee is considering a second phase of its predictive modeling of local ratings and asked Richard to share an update. Richard noted that in the first study we were unable to secure accurate TV programming information and intentionally did not include any viewing information from within the markets we were predicting. Paul Donato has suggested that we do a second phase including return path data information. The Local Measurement committee will host a meeting with Paul Donato and his measurement scientists along with Vasant Dhar of NYU and his measurement scientists to explore a second phase. The ultimate is to improve measurement in diary markets.

Billy noted that his committee is still in discussion with Temple University regarding an initiative using Bluetooth technology.

Finally, Billy invited suggestions from the CRE regarding Nielsen's local measurement initiatives for this fall. Ceril reminded the Council of the non-response studies in diary markets and suggested that it might be useful.

Data Quality

Ceril Shagrin reported that an RFP will go out next week exploring the issue of the impact on response rates by requiring that all devices in the home be metered. Howard Shimmel asked whether the response rate would be affected by which content would be tracked on the PC. Ceril said they could take a look at that. Christine Pierce said the PC meter mainly captures the URLs visited. Ceril expected to return to the Council in September to request funds.

Social Media

Beth Rockwood reported that the Social Media study will be presented at the ARF on June 15th, mostly by Ed Keller and Mitch Lovett. Regarding new projects, Beth said she is setting up a committee meeting to talk about the Nielsen social roadmap moving forward.

ROI

Dave Poltrack began by saying the committee's paper on long term effects will be presented at the ARF on Monday as well. The committee may regroup to decide next steps. On the second initiative on data sources, there was a meeting at Nielsen with Alice Sylvester on May 1st to look at the topic. Dave is awaiting a status report from Alice. Dave also mentioned some work that Brad Adgate and Howard

Shimmel had done and Howard said he would share with Shelley to distribute. Dave assured the CRE that Jim Spaeth and Alice Sylvester would complete the work despite the change in their work status.

Digital

Brad Adgate reported that there were two webinars in April; one for the CRE and one for Nielsen clients. They included group viewing and mobile. GfK is currently doing work with kids and teens. Brad reviewed some of the recent findings from the ethnography. In response to a question from Beth Rookwood, Brad said that advertising is the next area of study.

RPM

Pat Liguori reported that the One Touch Intelligence report will be delivered next month. She also reported that she is stepping down as Chair of the committee. Richard thanked her for her service.

Big Data

Stacey Schulman was pleased to announce that Catherine DeSesa of Media Brands, a Data Scientist, has joined the Big Data committee. She reported that in the past quarter Blue Kai, MasterCard and Neustar have all visited. The committee is working to get eXelate on the schedule. Stacey added that the committee is now looking at a specific project regarding similarities and differences between streaming media audiences and their offline cohorts. The study will take two approaches: traditional market and Big Data.

Communications

Joanne Burns asked Council members to provide the Communications Committee three days to review materials. She also let Council members know that Shelley will share press releases with them on the morning of the release so there are no surprises once the releases are reported. Joanne also reported that Nielsen declined to identify CRE members who are speaking as CRE members. Richard noted that we will send the CRE membership badges to the hotel for members to display at the conference. Joanne informed the Council that the weekly clip report has been branded CRE NewsWatch and is being distributed within Nielsen. Richard acknowledged Diane Laura for her support of CRE at Nielsen. Finally, Joanne made known that Communications funding is consistent with its budget goals.

Regarding publicity, Mark Braff noted coverage we received on our ethnography studies in MediaPost. It came from an invitation to Wayne Friedman to our Webinar. Also Stacey Schulman's Big Data Blog ran on the ANA website. Tom Campo reported that he had joined Buzz, Ceril, and Richard for a phone interview with Inside Radio on upcoming research by the Audio Committee.

New Business

Pat Liguori expressed concern about measurement fragmentation in which different companies create their own databases. She proposed a new committee called Measurement Fragmentation to explore the topic and explore what might be researched. George Ivie expressed interest to be involved. Janice Finkel-Greene also expressed interest in joining. Horst Stipp asked what the goal is and Pat said it is learning before charging blindly ahead. Dave Poltrack volunteered to join and suggested members of sales organizations be invited as partners.

Janice Finkel-Greene expressed interest in possibly leading some research on programmatic buying of cable.

Adjournment

The meeting was adjourned at 4:10 PM.

Addendum

Pat Liguori: Okay. I think what I would say to them is be curious, be thoughtful, and be present.

Howard Shimmel: It's actually interesting because I'm leading a session at the ARF Young Professionals, I guess, next Tuesday, and I've already prepared my speech. And it's really, I'm jealous of people who are starting in the business now. They're going to have way more time where they're dealing with other chaos. We had, I think, most of us, ten or fifteen years of calm. They're probably going to have their whole career.

Joanne Burns: I'm completely in line with Howard. When I mentor people, I tell them that this job has never bored me because if you like learning and you like entertainment, it's a nonstop cycle of doing both: learning about the entertainment business and viewing. So, yes. For learning, it's exciting and thrilling.

Joe Abruzzo: I always recommend to new people coming into the industry to really work hard and work as a team member with other people on your team, to complement each other and to learn from each other.

Hadassa Gerber: I always tell them, "This is a wonderful time to get involved in it. It's a moving target and you will never be bored."

Brad Adgate: I would have a really good understanding of math, technology, engineering, or science.

Buzz Knight: I would say, "Be open-minded in how you go about your business, but try to be really thoughtful about the little things," because the little things really matter.

Stacey Schulman: I would tell young people that no matter what they decide to do, to do it with passion -- because when you do it with passion, then it shows. And it helps with all your relationships. And the other thing that I tell young people is, "Don't be afraid to ask anyone in the organization you work for to tell you about how they got to where they got to," because everyone likes to talk about themselves, and it will ultimately help them understand that there are multiple paths to multiple ends.

John McMorrow: I would say, "Developing relationships and a Rolodex is still critical."

Billy McDowell: I would say, "Get very good at manipulating and visualizing data."

Nancy Gallagher: Be patient and be curious.

Christine Pierce: I'm also going to say, "Be curious but also be diligent in solving the questions that you have."

Janice Finkel-Greene: I would give them the same advice that I give to people who have been in the business for forty years: be critical and beware.

Tom Ziogas: Of the sentiments we had here: Be passionate about what you do, challenge the status quo, and tap into senior level people to kind of understand their experiences in this industry.

JED MEYER: I'd say, "Embrace the gray. There's not very much in this world that's black and white."

Beth Rockwood: I don't have magical words for new people, but I think it is a really good time to be in this business because good people can make a big difference if they really apply their skills and are able to communicate clearly.

Janet Gallent: So, what I would tell them, and I do give informational interviews, and I would say get your hands dirty and learn as much as you can by touching everything and being passionate and asking lots of questions.

Horst Stipp: Listen to all of the smart people. Hear what they have to say. They all made a really, really good point. Be curious and be especially curious of our data analytics because, otherwise, you'll be out of a job.

David Poltrack: I would say that if you want to look at the opportunities in this wonderful media/advertising business, there's no better place to be than the research department. This is where you'll see it all.

Kathleen Bohan: I would say, "Expose yourself to as much as possible because that's a lot of what helps you find your passion. Ask a lot of questions and learn from the people around you and learn to love data."

Cheryl Brink: I'd like to add to be passionate about Meta data. I think this is going to be a golden age for really understanding the consumer and what the consumer really values in media because they're going to have more choice. And I love the segmentations, for example, that Dave has worked on with CBS, where they've gained some understanding of how people consume different types of programs. So it's a golden opportunity for people.

Sara Erichson: I would say, "Be passionate, never settle, and never jeopardize your integrity."

Artie Bulgrin: I would echo the "be passionate." Be curious. Learn to communicate well. That will set you apart. And be ready to be a perpetual student.

Tanya Giles: I would say, very old-fashioned, but, "Show up." Show up for every meeting. Show up for everything you're invited to. Be there, be present, and listen.

Jeffrey Graham: I guess I would recommend that people develop a strong point of view of where their future is going and try to develop some expertise a little bit ahead of the curve.

Tony Marinaro: I'd say, "Ask questions, be the best that you can be, and strive to always keep up with the new methodology and techniques."

Keenan Pendergrass: I'd say, "Embrace change, trust your instincts, and listen thoughtfully to what people are saying or [inaudible16:14]."

Robin Thomas: I would just echo what was being said, but I would say, "Be bold. Don't be afraid, and make your [inaudible 16:32]. When you're learning, you can get away with that."

Andy Rainey: I would say, echo what everyone else has said and add that in today's environment, every medium has value to some consumer, and that we should keep an open mind. And slice the [inaudible 17:00] with the new.

Mark Kaline: I would say, "The most effective way to cope with change is to help create it."

Diane Laura: I would tell young people, "Take chances," especially early in their career, but be open to different opportunities. What they think they may want may not be what they want. And what they think they don't want may actually be a great venue for them. You just never know where something may take you, and I think taking chances, especially early on, is critical.

Tom Campo: Well, I really love the one; I really love the one about creating change to cope with change. So, I can't top that.

Mark Braff: As a PR guy, I'm partial to communication so I would say that, work on writing skills. Even though you're in research, I'm sure that that will help you in your career throughout the years, to be able to communicate and write well.

Ceril Shagrin: My advice would be to ask questions and when you get the answer, do your own research to find out why.

Richard Zackon: I'll just share a piece of wisdom that I've picked up along the way, which is the definition of a vocation, or a calling, which is where your deep gladness and the world's deep hunger meet. So follow your heart, and people will pay you to do it if it is valuable.