

Minutes from Quarterly CRE Meeting
December 3, 2015
Convene Conference Centers
New York, NY



Members in Attendance: Joe Abruzzo, Brad Adgate, Kathleen Bohan, Joanne Burns, Sara Erichson, Nancy Gallagher, Janet Gallent, Hadassa Gerber, Tanya Giles, Buzz Knight, Pat Liguori, Billy McDowell, John McMorrow, Beth Rockwood, Stacey Schulman, Ceril Shagrin

Present by Phone: Cheryl Brink, Paul Donato, Jeffrey Graham, Keenan Pendergrass, Dave Poltrack, Andy Rainey, Robin Thomas, Tom Ziangas

Also Attending: Mark Braff, Tom Campo, Lynda Clarizio, Shelley Drasal (by phone), George Franciscovich, Christine Pierce, Richard Zackon

Absent: Artie Bulgrin, Janice Finkel-Greene, George Ivie, Tony Marinaro, Jed Meyer, Howard Shimmel

Opening

Ceril Shagrin called the meeting to order at 1:02 PM by improvising with a can of diet coke in lieu of a gavel.

Operating Assumptions

Ceril opened the discussion inviting members to share their thoughts and suggestions regarding how to continue to be effective and to become more effective. Tanya Giles offered that perhaps committees should be dissolved after their research is complete unless there is a clear next step. Hadassa Gerber suggested that it should be up to the committee chair to dissolve a committee that has no work to do, but there is value in keeping a well-functioning committee together. Billy McDowell sees the Local Committee staying together until they find some solutions to local problems. Pat Liguori agreed that it should be left to the discretion of the chair. Joanne Burns expressed concern about the balance at meetings between reporting and discussing new issues.

Dave Poltrack commented we needed to be relevant to Nielsen and its agenda. Still, he could not associate any particular Nielsen initiative that came from the work of the CRE. In fact, the ROI committee is currently stalled on a project that requires Nielsen's active participation. He noted that it remains an issue of informing the Nielsen process as opposed to the overall industry process. Paul Donato offered to get in touch with Ross Link. Paul went on to say that from the start the CRE had a budget to do the kind of research no one other than Nielsen was doing with the hope that research would be independent. He added that some studies have had impact such as the non-response bias. Christine Pierce spoke to the importance of securing Nielsen's commitment and having the resources scoped out correctly. She also said that Nielsen had some work to do regarding practical applications of CRE work. Nonetheless, progress has been made in this area as some current CRE projects are of high importance to Nielsen.

Sara Erichson spoke to the possible value of Nielsen laying out a three year plan at the beginning of each year. Christine noted that we have been moving down this path and that she had done this for her area earlier this year. Tim Daly asked about Nielsen's R&D budget which Sara chose not to share, but suggested looking into a multi-year plan.

Stacey Schulman noticed the importance of discussing Nielsen's R&D plans. Ceril pointed to the ethnography that the CRE conducted and how it could help Nielsen. Hadassa Gerber reminded the council that its charter speaks to improving measurement not just Nielsen measurement. Billy claimed that the CRE has contributed a lot of learning about measurement whether associated with Nielsen projects or not. Horst Stipp stressed the importance of timing in a fast moving environment. Pat spoke to the value of having had Paul Donato and Steve Hasker sharing about Nielsen's development plan. Sara said that engineering should be added too because of the importance of technology. Lynda Clarizio said it is important for the CRE to understand Nielsen's new set of total content metrics. Methodologically, it goes to the core of what the CRE is doing. Beth Rockwood spoke in favor of fewer, bigger, better projects. While the CRE is not Nielsen's R&D group we have to have a view of what Nielsen is doing. Earlier involvement by CRE is important so as not be considered interference later in the timeline.

Nielsen R & D

Christine followed-up on an action item from the September meeting regarding program names. She reported that Nielsen is preparing a white paper in which they've taken a look at the impact of introducing program names into the viewer assignment model. The paper is due to be completed by year end and will be shared with the PGC, MRC and CRE.

Christine also spoke to the meeting in Tampa with Nielsen, CRE and GfK surrounding the Digital Ethnography research. She was particularly pleased that along with Data Sciences were Nielsen Application, Developers and Engineers. Her team gave highly favorable feedback and she provided some examples. Richard Zackon commented that the quality of listening from the Nielsen folks was truly impressive. Overall, Christine felt that the ethnography nicely complemented Nielsen's research. Joanne Burns noted that it was important for CRE to share its findings internally at Nielsen. Finally, Christine said the engagement in the last year between Nielsen and CRE has been terrific. The projects are relevant and good for the industry.

Steering Committee, Pat Liguori

Pat Liguori stated that the Steering Committee recommended Ann Casey from WCIU and Mainak Mazumdar from Simulmedia for membership on the council. Both were approved unanimously.

Pat then reported on a development on the platform valuation project which Joe Abruzzo is leading. The project called for recording programming from ABC, CBS, Fox, and NBC. ABC declined to allow the Council to record its programming and voiced concerns with the design of the research. They also reached out to the other participating networks to express their concerns, after which NBC revoked the permission it had previously granted. The individual from ABC sits on a CRE committee but not on the Council. Pat thought it was important that people who sit on our committees be aware of CRE principles and bylaws. Richard suggested that the Steering Committee is the place to follow-up on the issues. Joanne was troubled by the efforts to stop the study. Joe expressed concern about potentially

preventing the industry from having a good handle on the value of different platforms. Ceril stated the good news is that we got a good piece of research despite the actions of ABC. Joanne noted that the issue was not so much denying permission to use their material but lobbying other companies not to participate. Richard acknowledged Pat for leading in this area despite the obvious difficulties.

CRE Finances

Richard reported that there remains \$662,000 unallocated funds for 2015.

Data Quality

Ceril reported that the validation white paper with RTI is on track to complete in the first quarter of next year. A second project was proposed. It is a multi-device bias study. The study compares the tradeoff between high response rates (not all devices measured) versus low response rates (all devices measured). Ceril thanked Nielsen for making a special allowance for CRE to apply unspent 2015 funds, about \$600,000, to this study. The total cost of the project with a full sample of 4000 is \$1,539,395, with \$400,160 estimated to be spent in 2017. Sara asked whether mobile measurement is included in the plan and Ceril assured her it was. The funding for the project was approved by the Council.

Local Measurement

Billy reminded the Council that \$335,000 was approved for a machine learning project with Nielsen and Tony Jebara of Columbia University with Richard serving as project lead. This was intended as a follow-up study to an earlier machine learning project. This study was to include program names and return path data. It has turned out that the return path data are not available and the committee terminated the research in November. Billy noted that this is the third project that the CRE has been involved in with Nielsen where there has been a change in the availability of set-top box data. The committee is concerned about Nielsen's ability to operationalize those data. He reported his committee had a meeting with Sorenson Media about smart TV data. Paul noted that the current project was practical in nature. Paul acknowledge that Nielsen and Tony Jebara could not come to terms around privacy and security. It was also the case that Tony was unavailable after December. Lynda Clarizio joined in looking at how to avoid such a situation from arising again. The CRE should be aware that Nielsen only has the right to use certain data for certain purposes. She expressed concern with apparently wasting money on this project. Billy and Christine Pierce discussed the possibility of using smart TV data for research. Lynda said it would be helpful if the CRE could provide a statement of the purpose for which it would like data and to provide this as early as possible for its research.

Digital Research

Brad Adgate reported that the data have all been collected and mostly reported out for the ethnography studies. We are looking at an event in the first quarter to share the results.

Big Data

Stacey Schulman thanked the Council for the email vote to study data enrichment providers. Her committee is concerned that we do not understand how these data companies model their consumer targets. The committee is looking at the validity of the modeling practice. The study

will be both fact finding to understand these processes and some empirical research for testing. Findings of the study may be available in the spring. The committee is very pleased to be working with Gerard Broussard of Premeditated Media. It will look at eight DEP's to highlight strengths and limitations. One member commented that it is an area without much transparency. Christine agreed with the importance of the study. Horst recommended that rather than age and gender, participation in the market is a key variable, as is recency of the data collections. Stacey said the test is being run in digital media but they are still trying to get streaming into the process. Some issues remain about NDA's.

Platform Measurement

Joe Abruzzo updated the Council on the research that Hub is doing for his committee. Two thousand people measured across four platforms: TV, Computer, Smart Phone and Tablet. The study measured retention, recall and emotional reaction. Joe acknowledged Nielsen for its helpfulness in making available questions about plot points from its TV brand effects research. On December 17th at 3PM, the committee will share its results with the full Council. Lynda appreciated the work and tied it to work which Nielsen is currently doing. Richard congratulated the committee for doing great work under challenging circumstances.

Concurrent Screen Usage

Janet Gallent reported out the completion of the two quantitative projects of the study, a self-report survey of 4020 and passive digital metering of 310. In-home and remote interviews are near completion. Janet also shared some preliminary findings and requested up to \$50,000 of 2016 funds. Nielsen suggested that the definition used in this incremental effort be aligned with work that Nielsen is doing. Janet agreed. The Council approved incremental spending up to \$50,000.

12-24 Viewing Behavior

Tanya Giles reported on a meeting held November 19th regarding viewing habits of persons 12-24. Three categories of interest emerged from that meeting: measurement challenges, how they view and likely future trends. Streaming is a key issue among this demo. Tanya said the first call was productive and the next call can begin to identify specific research questions.

Audio

Buzz Knight reported that the project is in the field (Bakersfield and Charlottesville) and moving smoothly. Cooperation is actually better than currency. Robin Gentry and team at Nielsen are doing excellent work. There is good interest in this study from Nielsen's Audio Advisory Council. Hadassa asked about electronic measurement and Christine replied that the decision had been made for this study to use methods that currently exist in the small markets. There are problems with cost sampling and recruitment for electronic measurement. Hadassa suggested that Nielsen reconsider it in the future.

ROI

Davie Poltrack said the ROI study is in its final stages but is lacking analytic support from Nielsen which is blocking the completion. The committee will look at next steps after receiving the final report. Jim Spaeth and Alice Sylvester are closing the doors of Sequent Partners now that they are at RealityMine.

Social Media

Beth Rockwood reported that her committee is waiting for changes in the roadmap for Social Guide which will occur in 2016. Richard noted that the Renana Peres reported on some findings from the CRE study at a recent Market Research Council study.

Neurometrics

Horst Stipp reported for Howard Shimmel that there had been a discussion in October looking at new neuro methods and possible CRE projects. The group is considering using neurometrics to provide objective second-by-second data shifts in attention and focus to help the issue of defining television viewing which underlines the whole rating system. Horst noted there is a growing belief that people no longer pay attention to television and that belief may or may not be valid. Howard will schedule the next discussion to consider a possible research plan.

Insights to Practice

Nancy Gallagher announced that she was stepping down as Chair of Insights to Practice and in fact retiring from NBCU at the end of the year. The future of Insights to Practice will be taken up in 2016 and Nancy said she would forward her files to Richard.

Communications

Joanne Burns announced that for the time being the CRE would no longer be active in social media. Joanne announced that the CRE is seeking a new graphic designer. She also raised the question of the review process for CRE public communications. Richard had proposed expanding the Communications Committee so other CRE members can contribute to these efforts. Finally, Joanne raised the question of CRE's participation at Nielsen 360. Sara and Lynda said that the timing was good. Joanne and Sara will follow up.

Mark Braff gave a brief PR report.

A brief discussion ensued to streamline the process of turning research into presentations, including sharing learnings with Nielsen.

Education

Jed Meyer was absent and Richard reported on an effort to link online to videos relating to audience measurement. A couple of Richard's NYU students have already collected close to 60 such videos.

Celebration

Ceril toasted every member of the CRE for intriguing research conversation and accomplishment. She added a special toast to Nancy Gallagher upon her retirement.

Brad announced that he was leaving Horizon Media after 17 years and going to Comcast Spotlight.

Board Elections

The Council Chair is up for election. It is a one year term and Ceril has served for four years. Richard wanted to provide the Council with a choice and Billy McDowell said he would be available if it were acceptable to Ceril. Ceril also remains available. Billy and Ceril temporarily left the room. The question came down to whether there should be term limits on the CRE Chair position, not whether the Chair should be Billy or Ceril. Lynda proposed the position of Chair Emeritus for Ceril and council members liked the idea. The Council approved the title of Chair Emeritus for Ceril. Billy was nominated and approved for Chair. Ceril and Billy rejoined the meeting and were informed of the Council's decision.

The next item of business was Chair of the Steering Committee. After having served as Chair for three years, Pat is stepping down. Hadassa nominated Ceril and she was elected without opposition.

The election of Steering Committee members was next. Pat Liguori, Robin Thomas and Sara Erichson were present at the meeting and expressed a desire to continue serving on the Steering committee. Ceril, as Chair will also be on the Steering Committee as well as Billy McDowell. Stacey Schulman, Keenan Pendergrass, Joanne Burns, and Tim Daly stepped up to serve on the committee; Hadassa agreed to serve pending word from Jed Meyer and Janice Finkel-Greene, current members who were not in attendance. Hadassa was ready to serve if those members did not agree to fill the open positions. The Council voted and approved the slate.

New Business

Richard noted a suggestion that was made to choose a topic at each meeting to be discussed at the next meeting, and proposed that it be done right after the break at each meeting.

Adjournment

The meeting adjourned at 4:20 PM.