

Minutes from Quarterly CRE Meeting  
June 16, 2016  
Convene Conference Center  
101 Park Avenue at 41st  
NY, NY  
10178 Pershing Hub



Members in Attendance: Kathleen Bohan, Tim Daly, Pete Doe, Sara Erichson, Janice Finkel-Greene (Bridge Member), Janet Gallent, George Ivie, Buzz Knight, Billy McDowell, John McMorro, Beth Rockwood (Bridge Member), Stacey Schulman, Ceril Shagrin, Howard Shimmel, Robin Thomas

Present by Phone: Cheryl Brink, Ann Casey, Pat Liguori, Andy Rainey, Tom Ziangas

Also Attending: Mark Braff, Shelley Drasal (by phone), Jed Meyer, Christine Pierce, Horst Stipp, Richard Zackon

Absent: Joseph Abruzzo (Bridge Member), Artie Bulgrin, Joanne Burns (Bridge Member), Paul Donato, Hadassa Gerber, Tanya Giles, Jeffrey Graham, Lucy Hughes, Keenan Pendergrass, David Poltrack

## Opening

Billy McDowell opened the meeting by saying how the Council had a lot to discuss today. He asked that as everyone introduced themselves, that they think about what they are passionate about and list three things. These items are contained in the appendix.

## Words from the MRC

George Ivie shared some points of view at the invitation of Richard Zackon. He acknowledged the Council for the great work it has done and is suggesting an area where it can improve as an organization.

MRC works extensively with Nielsen like no other organization, auditing its core currency products. Beyond those products, the environment is extremely dynamic with a host of issues. George reviewed how the CRE came about from a commitment Nielsen made in a congressional hearing in July, 2005. Susan Whiting committed \$2.5 million annually for the CRE to conduct R&D for the industry. George said the CRE needs to focus like a laser on helping and improving Nielsen across TV, Audio, Digital, Print, International, Multi-Media/Cross Media. One thing the CRE can do is to work with Nielsen to ensure that the learnings from previous research gets acted upon. George offered four key suggestions: 1. Improving Measurement of Children and Teens, 2. How much financial incentive is too much? 3. Integration of Return Path Data (RPD), and 4. Optimizing the Use of Nielsen and Partner Measurement/Information Assets, He then offered 10 further possibilities: 1. Diary service retirement strategies, 2. BBO household integration in local; UE estimation, 3. Techniques for ratings stabilization, 4. Better leveraging of the ACS in Nielsen custom-UE processes, 5. OOH measurement of television – fusion, direct measurement, etc., 6. Extended home (students) – developing more stable measures, 7. Returning in-car measurement to audio metrics, 8. Values

and exploration of social metrics planned by Nielsen, 9. Improving reporting products and user interfaces, and 10. Learning from international processes and experiences.

George encouraged the council to think about how Nielsen might use its host of assets in improving measurement, including Return Path Data and issues of invalid traffic.

Pete Doe noted that Nielsen about a year and a half ago catalogued all of its data assets and that might be a place to start. Howard Shimmel raised the issue of the possible influence on Netflix subscribership of Nielsen's panel compensation. Janice Finkel-Greene suggested public relations to stress the importance of accuracy.

## **Nielsen R & D**

Christine Pierce acknowledged George for the terrific dialogue he just held with the Council. She encouraged committee members to review the list and offered to work with them.

Nielsen has a huge focus right now on local television and bringing in new types of measurement. This reflects changes in the environment (including consumer behavior) and industry needs (stability, fewer zero cells and more frequent updates). Nielsen has been working with integrating return path data for a number of years. They have also been looking at working on integrating PPM measurement for out of home and wearable devices. There is still work to be done around integrating different definitions of media use.

Nielsen has also committed to expanding its Scarborough measurement as there are better uses to be made of the Scarborough instrument. In addition, Nielsen is seeking to improve online survey methods. Finally, Christine spoke of the importance of integrating panel and big data measurement.

Pete Doe expressed concern about getting granular data across all set-top box providers. Howard Shimmel said forward looking dialogue about how media is going to be transacted over the next five years is desperately missing in our industry. Perhaps CRE could lay out a road map about how we are going to trade in the future.

## **CRE Agenda 2017**

Richard began by saying the CRE typically has considered research projects on an ad hoc basis not with a holistic coherent look across measurement issues. Richard asked what is the CRE's response to Howard's suggestion about a marketplace dialogue on industry future needs. One member suggested a series of industry interviews. Tim Daly noted his company discovered through agency interviews the challenge of changing the currency. Beth Rockwood expressed concern that if we interviewed people we could end up with the Edsel. Janice Finkel-Greene did not think interviewing agencies would be useful. Janet Gallent suggested floating conceptual ideas and conducting a conjoint analysis as opposed to interviews. George Ivie agreed that a different process is needed as our crystal ball.

Stacey Schulman, John McMorrow, Cheryl Brink, Janice Finkel-Greene, Tim Daly, and Howard Shimmel and Ceril Shagrin volunteered to discuss how we might move forward with the process. Richard also asked the group if there were any other topics we might want to consider.

Horst agreed with George that data quality often takes a back seat to progress. Pete Doe commented that at the ARF earlier this week, cross platform and fraud were two primary issues. Richard added that ROI was also a focus at the ARF. Horst added that advertisers tend to focus more on the effect of exposure than on data quality and connected to that is the value of each

medium. George shared that he had spoken to the ANA earlier in the week on the importance of data quality. He also estimated that digital ad fraud is a 10% problem, ad blocking is a 15-20% problem and viewability is a 50% problem, but he sees other industry groups (ANA, IAB, MMA) addressing these issues.

## **Steering**

Ceril Shagrin reported that the Steering Committee was unanimously recommending three applicants for membership: Brad Adgate who is now at Comcast Spotlight, Jon Cogan from Annalect and Debbie Reichig from 20<sup>th</sup> Television. Richard noted that the Council currently has 14 openings. All three applicants were voted in without opposition.

## **Finances**

Richard stated that if the Council approves today's recommendation from Neuro, we will have accounted for \$2.3 million for the year with \$700,000 remaining for additional research.

## **Insights to Practice**

Pete Doe reported that there was meeting in the morning, his first day on the job and thanked those in attendance. The work CRE does is important, but we don't want it to gather dust on a shelf. The committee has been seeking more involvement on the product side from Nielsen and we were delighted to have Eric Solomon at today's meeting. He suggested that the Insights to Practice process needs more follow-up and discussion and maybe more formalization around the results. He said he would meet with Nielsen and Richard to look at what we have done so far. He suggested that we should categorize the results and the benefits of the research. The second part of the early discussion was a review of individual projects. One focus moving forward will be a list of research questions that are asked as part of every research project. Richard acknowledged Pete for a great meeting and adding Eric Solomon onto the committee.

## **Neurometrics**

Howard reported that phase 1 and phase 2A of the Nielsen Neuro project went perfectly and acknowledged Naomi Nuta. The committee is now evaluating the data. Today we are requesting funds for the second phase of the research which will allow us to measure real in-home behavior and how people react to the people meter. Beth framed the question as checking in to see how measurement aligns with new viewing situations, including attention, audible exposure and watching and listening. George Ivie asked if PPM would be included and Beth said at this point only national people meter. Pete Doe asked whether this could lead to a change in the definition of viewing and Beth replied the study is intended to drive a discussion on that definition. Right now the panelists are asked whether they are watching or listening. Horst said it is about whether the instructions to the panelists should be changed. Ceril said the study is a step in getting insights into what the definition should be. Sarah noted the time sensitivity for using PPM for Out of Home. Horst added that the research will be incredibly instructive to the Googles and Facebooks who have to think about "what is exposure" and how much time people spend with their devices. George cautioned that we should not consolidate too many events in the metrics, delivering the ad (media responsibility) verses holding the viewer (agency responsibility). Stacey wondered how we parse out the various elements of attention and distraction, including loss of interest. Beth replied we will be coding information on a second by second basis and we are developing a model of distraction. Beth laid out the research questions: 1. What is the frequency of distracted viewing relative to non-distracted viewing for ads vs. content? 2. How does emotional response change under conditions of

“watching” or “watching & listening”? 3. What is the frequency of button pushing when in a distracted vs. non-distracted environment? Beth laid out against these questions, the various methodologies: Biometric, Point of View Glasses, Behavioral Coding, Passive Meter Tech and Exit Interview. Stacey asked when we look at watching and listening whether we would look at listening alone and Beth said we would not be able to determine that. Horst added we will be able to see change in attention but it will difficult to attribute it to a device.

Beth went on to say that the second phase will allow us to take the in lab learnings from the pilot and apply them in a real world environment. She laid out the beginnings of a model of distraction to inform variations in watching and listening at home. This includes elements such as attention, co-viewing, channel changing, entering or exiting the room and logging into a people meter device. In response to a question from Jed, Beth replied that sleeping would be represented by “head down”. In response to a question from Pete, Beth said they would look to see if TV is paused or rewind. Beth offered to distribute a full list of coded behavior to the Council. She also showed some examples of different types of output that we will get, including people meter behaviors.

Robin Thomas asked whether seasonality would be looked at and Beth replied the field work will occur between September and December including lots of different types of programming. Howard asked the Council to approve \$492,000 for the second phase of the neurometrics study. Christine believed the study will help with Nielsen’s coaching and instructions and could also represent its first application of neuro research into its methodological tool kit. Before the vote, George raised the issue of measuring the portable people meter. Howard suggested that this might be better suited for a later phase. George suggested Nielsen plan to replicate these studies. The motion to approve the project carried. Ceril requested that Nielsen share recent in-panel coincidentals and Christine agreed.

## **Big Data**

Stacey reported progress on the Big Data Target Validation project. She commented it stands at the heart of the relationship between data analytics, data science and market research. The approach has changed: we are now seeking to work directly with advertisers who will share their actual customer data with us. The ANA has been helpful in this and we are now working with some major advertisers looking to settle on 3. We expect to be in the field in September. A survey component is also being proposed. The committee requires more time for its proposal for incremental funds. Stacey requested that the Council approve an email vote. Janice Finkel-Greene asked multiple questions about the value of the study which Stacey answered. Richard reminded the Council that there was a motion on the floor for an email vote. The motion passed and Richard invited Janice to attend the Big Data Committee meetings to get her questions answered.

## **Audio**

Buzz Knight began by saying he was not asking for more money. The Dual Measurement Diary study is complete and has been reported out to the Council. The key takeaways from the study are: People will do more than one thing, Radio-first methodology performed well, Scarborough follow-up booklet methodology performed well, TV-first methodology and person-level TV diary need further investigation. The next steps are: Incorporate electronic measurement, Focus on Radio and Scarborough. Buzz acknowledged Robin Gentry and Nielsen for the great job they did. Discussion followed about when the study would be shared with Nielsen clients and Richard replied no later than November.

## **Platform Evaluation**

Tom Ziangas reported that the second phase of the Platform Evaluation study is currently in the field with over 900 completed surveys. He thanked Dave Poltrack, Joanne Burns and Ceril Shagrin as their companies provided programming for the study. They are on track to complete by July 22<sup>nd</sup>.

Richard noted that registrations were high for the upcoming Nielsen 360 presentation. We have 160 at both sessions.

## **Concurrent Screen Usage**

Janet Gallent reported the committee is beginning to mine the data from the GfK study and has enlisted Justin Fromm to help with the data mining. The committee is also looking at the possibility of studying out of home measurement.

## **Data Quality**

Ceril Shagrin reported her committee on multi device measurement is seeking to collect a lot of information while achieving a high response rate. They are in the process of determining which questions to include. The second project is the RTI White Paper, a guide for validating new data. Evan Kutner of NBC has been working hard to make the paper readable for non-specialists.

## **Local Measurement**

John McMorro reported that there will be an upcoming event in November at a date to be determined. Separately, the committee plans to issue a request for proposal regarding media consumption for young adults. It is envisioned as a ten-year study. Christine Pierce noted that Arbitron and now Nielsen have been conducting such a longitudinal study. Results are reported out annually. That study involves several universities.

Stacey wondered if the Local Committee might compare and contrast the widening gap between Nielsen's local and national measuring tools. Richard commented that the CRE is working on a matrix of metrics comparing the different TV measurement methodologies. Beth commented that sometimes the measurement needs to be the same and sometimes there needs to be separate solutions. Janice suggested that we look at third parties too.

## **ROI**

Richard reported that we seem to be making progress on the third piece of our ROI study on Marketing Mix Modeling. It involves an assessment of local market metrics.

## **Virtual Reality**

Richard reported that Jeffrey Graham would like the CRE to begin exploring Virtual Reality. We are looking at a sort of science fair for CRE members to look at various VR devices. Howard offered the Time Warner Media Lab.

## **Digital**

Richard notes we have no Chair for our Digital Research Committee and invited anyone interested to step up.

## **Communications**

Ann Casey, the new committee Chair, thanked Joanne Burns for helping her transition into the new role. She reported that members of her committee are reviewing the website for the purpose of reorganizing it which will be a topic for the next committee meeting.

Mark Braff reported on the publicity on the March 29<sup>th</sup> event which included a major piece in Multichannel News by Mike Farrell. It shows the value of having press at our events. Mark also acknowledged the committee members for their responsiveness in providing feedback to newsletter drafts.

Ann reminded the committee of the protocol document that Shelley sent out for conference calls. We plan an additional document for committee chairs.

Richard suggested that every few years we should look at the branding of the CRE as to who we are for the industry. Janet said that she would like to have a consideration of the new template. Traffic to the site was questioned and Richard asked Shelley to report back on that. Richard also noted that we had not done a client survey in a few years. Robin Thomas offered to help. Beth asked about the logo and Richard said that would be good when we looked at branding. Richard acknowledged Joanne for her hard word as Chair of the committee.

Howard asked whether we would put out a press release announcing phase 2 of the biometrics studies. Richard replied we usually don't do announcing new studies, we do press release when we have results. We will do a press release when we do the July event. A number of members spoke to the importance of neuro.

## **Upcoming Events**

Richard reported we are planning an event on July 27<sup>th</sup> considering we have data in hand from Platform Evaluation. It will also include an initial report on Neuro. Jim Webster from North Western has been invited. He also reported a video dialogue series on "What is it to Watch TV" with 50 people participating on the first dialogue.

The VR science fair is being planned for the fall. We are looking at a November event on Local Measurement and we in discussions for a "geek" event: including the Big Data study and the Valuation White Paper.

## **Education**

Richard noted that we do not have a Chair for the Education Committee so there is no action to report. Jed Meyer, who is not now a full member of the CRE agreed to discuss leading the committee.

## New Business

Richard put out a couple of final topics. One was an email that he put out recently to committee chairs about the attendance on their committees. He will follow up with each of the Chairs so that we honor our 50% attendance rules for committees. Richard raised the possibility of renewing conversations around return path data/set top box. It was one of the items on George Ivie's list. Pete Doe agreed to host a discussion and Ceril agreed to participate. Cheryl Brink also had someone at Scripps she would like to participate.

After a round of mutual congratulations, Billy McDowell adjourned the meeting at XXXX

## Appendix

**Ceril Shagrin:** Hi, it's Ceril. I'm passionate about my family. I'm passionate about my friends. And I'm passionate about research done right.

**Pete Doe:** Hi. Pete Doe. I actually have two of those things. Getting research done right and my family, and my other passion is music. I play guitar, mandolin, and keyboards kind of badly. [Laughter.]

**John McMorro:** John McMorro. Cox Reps. I share the passion about the family and getting a good job done. Also, every day I like to think that I move people down the field just a little bit further.

**Stacey Schulman:** I'm passionate about my family, definitely. Passionate about music, as a lot of you know. And, of late, I'm passionate about navigating the actual and virtual spaces of our lives and how that's changing us as a society.

**Jed Meyer:** Hi, this is Jed. I'm passionate about making sure we measure everybody appropriately. [Laughter.] Alright, come on. Number one. Number two, I'm passionate about iced tea. [Laughter.] Thanks to my time in the south. The drink. Billy knew what I was talking about. Iced tea. And number three, I'm going to end with something I used to be passionate about but I am not anymore, and that is Chipotle. And anybody who knows me well, and I've been getting emails from people on my new job, "Hey, let's get together. Would you like to get a burrito?" And after the food safety crisis and the arrogance of that company and the lettuce, not tasting the way it used to, I am no longer a brand ambassador and this shows you the power of losing a valuable customer. [Laughter.]

**Robin Thomas:** Okay. It's Robin Thomas with WG in America and Tribune Media. I'm very passionate about being here today because I haven't been able to travel much this past year. My husband has recently been diagnosed in remission for his cancer he's been battling for the second time this past year, so I'm very passionate about having him healthy and my family healthy. I'm passionate about college football. I love the Georgia Bulldogs and now am very passionate about the LA Rams. I've very excited we're going to have a team in our town.

**Buzz Knight:** Buzz Knight. Definitely family and friends. Passionate about curiosity and all that that means. Passionate, really, about resilience, because we all need to be resilient in this day and age.

**Howard Shimmel:** Howard Shimmel. Turner. So like every, everybody's passionate about their family, hopefully. But I am from a work perspective, I'm passionate about resolving the issue of data science vs. big data vs. research and resolving it in a way that the company doesn't do something that's stupid that gets on the front page of the Wall Street Journal and that becomes a forcing issue to fix it. I'm passionate about seeing the New York Rangers win the Stanley Cup before, again, before I die. [Laughter.] And I don't know if it's polite to say, but I'm passionate about seeing Donald Trump not elected President. [Laughter/Applause.]

**Horst Stipp:** Well, Horst Stipp, from the ARF. I'm passionate about that too. I'm passionate about a lot. Right now, particularly passionate about finding the right balance between my semi-retirement and traveling a lot. And from a business point of view, you know, I'm really into neuroscience and figuring this all out and promoting it because I really think it works. Thank you.

**Janet Gallent:** I'm passionate about politics lately. I was never really big on politics, but now all of a sudden I am. So maybe there's some good that came out of Trump. [Laughter.] With that regard. I am very passionate about lifelong learning. I embrace every opportunity to learn something new. And quality of research really. I'm a very quiet person, but when you get me in that mood, boy, I'm a very different person.

**Janice Finkel-Greene:** Janice Finkel-Greene, Bridge member. I'm passionate about ethics, exercise, and maintaining a sense of proportion and a sense of humor.

**Mark Braff:** Mark Braff. I would say first and foremost family and friends, and then secondarily, politics, sports, and just doing the best that I can do with whatever I'm doing.

**Christine Pierce:** I'm Christine Pierce. I'll give the family answer as well. But, on top of that, I'd say two things related to my work. One is filling in measurement gaps that exist. And two, and related to what Howard said, is making sure that when we're filling in those gaps that we're doing so in a way that's research driven and rigorous and that we're not just kind of taking big data because it purports to measure something and sticking it in and saying that fills that gap. Making sure that we're actually bringing the theory and the research rigor to our census and panel measurement and seeing the power of big data and what it can bring, but also sure that we're correcting for the biases that are also there.

**Tim Daly:** I'm Tim Daly. I'm passionate about my family. I'm very passionate about the people that work for me. I'm passionate about what's going on at Oakmont this afternoon. And I'm, on the research and business side, I'm passionate about building the systems that we use that really kind of use the currency to really run the business. It's a very unique part of this business. It's a very unique business because of it. Because of that passionate about the speed at which we can feed these systems to data they need so we can make the best numbers and projections we can on the business side.

**Beth Rockwood:** Beth Rockwood. Currently free agent. Bridge member. Obviously passionate about family. My daughter just got married, so very proud of growing family and more to come. Politics is a passion, I think, especially because of the current situation. I agree with some of the comments made earlier. I have been paying an awful lot of attention to what's going on and thinking hard about what to do about it. And curiosity, lifelong learning, I think, is right up there. Most recently have had the pleasure of being involved in this neuroscience project and have started reading and just really getting very very interested in how the brain works, and it's really quite fascinating.

**Sara Erichson:** Sara Erichson. I think the rest of us should stipulate on the family ones. We don't have to agree. [Laughter.] So keeping it personal, I'm passionate about playing tennis, passionate about the Boston Red Sox, and passionate about getting the right outcome for this election.

**George Ivie:** I'm George Ivie with the MRC. Obviously the family part stipulated. I also have three dogs, so I'm passionate about my dogs. [Laughter.] Very passionate about ice cream, my favorite food. [Laughter.] And then also transparency, quality, and MRC members.

**Kathleen Bohan:** I'm passionate about my family too. I have a huge extended family, so anyone who knows me remotely knows to throw a rock and they'll find someone I'm related to. Game of Thrones. No one talked about television. Very passionate about Game of Thrones. Lot of fan theories. Watch the show and after the show. And curiosity. You know, obviously passionate about measurement and measuring Hispanic audiences correctly and accurately and representing them in research that we do. It's been pretty much my lifelong career. But also curiosity.

Learning, growing. Everything's changing. Making sure that we, as much as possible, trying to

stay just that little bit ahead of the curve.

**Richard Zackon:** Richard Zackon. I'm passionate about politics, particularly these days. I am passionate about using data intelligently. And it's a good time to have that passion. And I'm passionate about people being passionate about their work; that they're joyful, productive and fulfilled in their work. And a lot of that piece is collaboration. So I'm clearly at the right spot engaged in those passions. We will come back to you on the phone. We'll get the last word on the phone. We have Cheryl Brink.

**Cheryl Brink:** Hi. The friends and family I'd like to build upon that and say that my focus is to get people to appreciate one another, and what's good about each other and what is common as opposed to what's not common with one another. I love research and I'm particularly passionate right now about how to bring the worlds of social and web measurement together and reconcile them so we understand similarities and differences. And then I love nature and animals and, George, I had one or two dogs in the past. I love dogs.

**Ann Casey:** I'm also passionate about my family, art and knitting, lifelong learning, exercise, the Green Bay Packers, and quality measurement.

**Andy Rainey:** Andy Rainey. Radio Advertising Bureau. I'm passionate about radio, friends, family, and my cat critters. Truth in politics and media, especially now. And animal rescue, especially horses.

**Tom Ziangas:** Passionate about mentoring young people in our business. Passionate about sharing my knowledge with others. And passionate about travel on the Mediterranean.

**Pat Liguori:** Well, did you know that the word "passion" is derived from a word that means to suffer? So I'm not sure I want to be passionate about too much, if that's the case. I am passionate about my privacy. I am passionate about transitioning to a more balanced life, and obviously family and animals and all of those things. But after years and years and years of being over balanced or unevenly balanced towards work, I'm very passionate about correcting that balance.

**Shelley Drasal:** My children, my family, and my daughter getting ready to go to college, applying to colleges. Passionate to see where she's led to.