



**CRE QUARTERLY MEETING  
JUNE 15, 2017**

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# OPENING COMMENTS

**BILLY MCDOWELL**

# OPENING QUESTION

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As we prepare ourselves and our companies for the transformation in media and research, how should we develop our skills, our knowledge, our practices, our thinking, our social networks and our staffs?



# ARF REVIEW

**Horst Stipp**



# A RESEARCH IDEA

**Jonathan Steuer, Ominicom Media Group**



# RESEARCH UPDATES IN A MINUTE

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# AUDIO

**Buzz Knight**

# CRE FRAMEWORK FOR HYBRID MEASUREMENT OF LOCAL MARKET RADIO LISTENING-PROGRESS UPDATE

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- Work began in January to develop CRE Framework for Hybrid Measurement of Local Market Radio Listening White Paper with Audio Committee and RTI.
- Information Gathered:
  - Focus groups with current Nielsen customers
  - Nielsen conference calls to gather information and exchange materials including new methods under consideration for creating hybrid estimators.
  - Big Data Review of publicly available documents



# CRE FRAMEWORK FOR HYBRID MEASUREMENT OF LOCAL MARKET RADIO LISTENING-PROGRESS UPDATE

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- Current draft includes:
  - Background on local measurement landscape
  - Quality profiles of PPM and Diary
  - Summary of methods that could be applied to mitigate error risks
  - Potential Sources of Big Data
  - Methods of hybrid creation
  - Potential error sources with Big Data
  - Effects of combining diary/PPM and Big Data



# **BIG DATA**

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**Stacey Schulman**

# BIG DATA

## Study of Modeled Targeting to be Expanded in 2017/18

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### > ***Modeled Targeting Complete!***

- Presentation to CRE Council (webinar) in April
- Press Release in Development
- Possible contributor to a CRE Modeling Event
- Presentation to Key Partners in May/June yields future presentation/collaboration opportunities
  - > ANA – Fall Measurement Conference
  - > IAB – Fall Leadership Conference

### > ***Future Project: Online Modeled Target Validation, Part 2***

- Expand Target Validation study to include a broader array of categories and brands
- Committee is currently evaluating proposal from Pre-Meditated Media
- Expected time frame of study is 5-6 months



# ROI

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**Dave Poltrack**

# DEVELOPING BETTER TV DATA FOR MARKETERS

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- ***Work completed on Part 2 of project***
  - Presented to full CRE
  - Presented at 2017 ARF Audience Measurement Conference
  
- ***With planned work now complete, the Committee will meet following Upfront concerning next steps. Options to discuss:***
  1. Build on base of initial findings
  2. Wait to assess the impact of findings on current Media Mix Modeling and ROI Measurement practices
  3. Suspend work of Committee or combine with one or more other committees working in related areas
  
- ***Upcoming CRE Big Data Day presentation***



# DATA QUALITY

Pat Liguori

# NON-RESPONSE BIAS STUDY UPDATE

## Purpose Review and Progress Report as of June 15, 2017

### > **Research Questions**

What is the impact to sample quality for measurement of:

- > Computer and mobile when not all devices are required to be measured?
- > TV when all devices are required to be measured?
- > TV, computer and mobile when people refuse to participate in any media measurement?

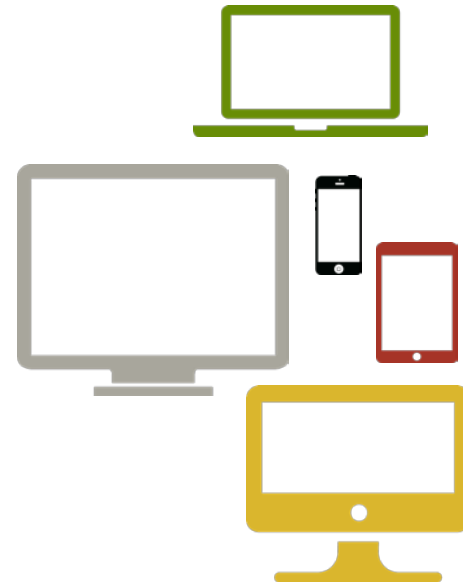
### > **Sample Counts and Completion Rates**

- > Participators: 3,217 and 81%
- > Refusers: 943 and 44% (*Target 1,065*)
- > Total: 4,160 and 68%

### > **Complete In-Person Collection by July 14, 2017**

- > 4 attempts made for Participators and Refusers
- > Revise to 5 for Refusers/ 3 for Participators
- > Possibly add \$25 discretionary incentive for Refusers

### > **Final Report to be Released August 11, 2017**





# NEUROMETRICS

Howard Shimmel



# NEURO COMMITTEE

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- ***Phase 2B- In Home Observations- 100% complete***
  - Presented initial findings to CRE on March 1
  - Presented at ARF Conference on March 21
- ***Met with Nielsen Measurement Science April 6<sup>th</sup> in Oldsmar***
  - Focused on study results and implications for TV and cross-platform measurement
- ***Nielsen Client Community webinar scheduled for June 20<sup>th</sup>, 367 people registered (biggest in CRE history).***
- ***Will use month of July to plan next steps for committee***



# RETURN PATH DATA

**Cheryl Brink**



# CRE FINANCES





# OTHER RESEARCH COMMITTEES

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# **MEDIA CONSUMPTION & ENGAGEMENT**

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**Janet Gallent**

# FOUNDATIONS FOR 2018 VCM REFRESH

The MCE Committee is requesting \$80,000 for foundational research projects

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- ***Qualitative Research with Heather Coffin/SoundHQ on capture the language consumers use to talk about TV viewing behaviors: To inform primary research measurement***
  - Unique Approach: Storyboards without Text
  - In Depth Interview with 48 A5-64 (Dyads) at NBC Media Center in Universal Orlando Parks
    - > Cross-section of consumers from across the country
    - > Costs: \$56,000
  
- ***Two White Papers prepared by Betsy Frank and Tim Brooks: To inform scope and methods that can be used in VCM Refresh***
  - Review of all CRE studies to synthesize relevant insights, including deep dive on original VCMS
    - > Costs: \$12,000
  - Literature review of other relevant studies conducted and published in the past 5 years
    - > Costs: \$12,000



# LOCAL MEASUREMENT-STUDY OPTION CONSIDERATION

John McMorrow

# Out of Home – Location, Consumption, Device, Time Spent, ROI Recency

## Goals of the Research:

### A CRE initiated study on how to best track location for OOH viewing

- More detailed reporting than current PPM data collection which only ID's away from beacon but not location
- As separate data set fused to PPM data
- Identify any coverage gaps
- Identify any demography being collected in the data selection
- Identify reported viewing type by location

### Identify any problems & issues:

- Segment out what hinders cooperation
- Co-operation Rates (probability panelists not used previously)
- Ongoing compliance
- Privacy Issues (possibly use Four Sq. panel for location ID)
- Demo skews
- Skews by OOH viewing behavior



# Combining Multi Data Sources – How best to determine what to collect & that weighting is accurately representative

Goals of the Research: How can we combine diverse sets of viewing tuning data to represent actual behavior in local markets?

**Objective:** Study NSI's weighting and calibrating approach to overcome bias and account for imputing missing data. There could be multiple overlays which move it away from primary panel research. CRE needs to understand the differences in methodologies and how the results should be combined.

- Study that looks at particular data streams compared with integrated RP
- Review scrubbed RPD data and how it is merged with LPM & MM Market then compare results.
- Identify best practices/methods for combining data from multiple panels, or panels and big data.
- Best weighting methods for combining data sets of different sizes
- Review the methodology for integrating data set ratings at local market level and for ID/Assigning bias from different data sets.
- How can a proprietary algorithm be evaluated



# FUTURES

Debbie Reichig

# FUTURES!!!

## > **Mission Statement:**

- “Envision marketplace needs for media measurement in the next decade to inform the industry and guide deployment of CRE resources.”

## > **4 broad topics, each with sub-topics:**

- Tech Advances
- Transactional Buying/Selling
- Data & Measurement
- Legislation

## > **Fall Meeting Plan: Tech Advances**

- Short 15 mins. presentations
- Breakout into small groups

## > **Sub-topics:**

- VR & AR
- IoT
- OTT
- Connected TVs
- Auto content recognition (ACR)
- Transformation preparation
- ATSC 3.0
- LTE 5G
- IP convergence
- vMVPDs
- AI
- Voice activation



# **OPERATING COMMITTEES**





# **STEERING**

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**Stacey Schulman**

# STEERING COMMITTEE

## Multiple Issues Addressed this Quarter

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### ➤ ***CRE Charter and Mission Statement***

- Steering committee recommends no change at this time

### ➤ ***Membership***

Diversity, Communications, Steering Committee potential homes for membership initiatives

### ➤ ***Committee Attendance***

Committee chairs please review your attendance records

### ➤ ***Non-Disclosure Agreements***

Lea Epstein, General Counsel – Nielsen prepared simple NDA for Council/Committee members



# INSIGHTS TO PRACTICE

**Pete Doe**

# INSIGHTS TO PRACTICE COMMITTEE

1. Project Initiation Form extended to include Summary of Findings post-project
2. Trying to schedule ITP/Neuro meeting!
3. Project Review – Sequent Partners?
4. VCM Study Retrospective





# **COMMUNICATIONS COMMITTEE**

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**Robin Thomas**

# COMMUNICATIONS COMMITTEE

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➤ *CRE Rack Card Flyer*



## NEWSLETTER

**N**ielsen is proud to support the Council for Research Excellence (CRE) in its mission to advance the knowledge and practice of methodological research on audience measurement.

Each month, the CRE publishes a free newsletter that provides an overview of the group's activities, news of upcoming events, informative interviews with senior research executives, and more.

We urge you to subscribe to the newsletter if you are not already receiving it.



Visit [www.researchexcellence.com](http://www.researchexcellence.com) and click the sign-up button at the top of the home page.

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# COMMUNICATIONS COMMITTEE

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## > *CRE Rack Card Flyer*

## > *Recent Communications*

1. Issued press release June 12 to coincide with presentation at ARF on data modeling for TV.
2. May newsletter achieved best open rate ever (32%).

# COMMUNICATIONS COMMITTEE

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## ➤ *Communications Strategy Document*

# COMMUNICATIONS COMMITTEE

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## ➤ *Recent Communications*

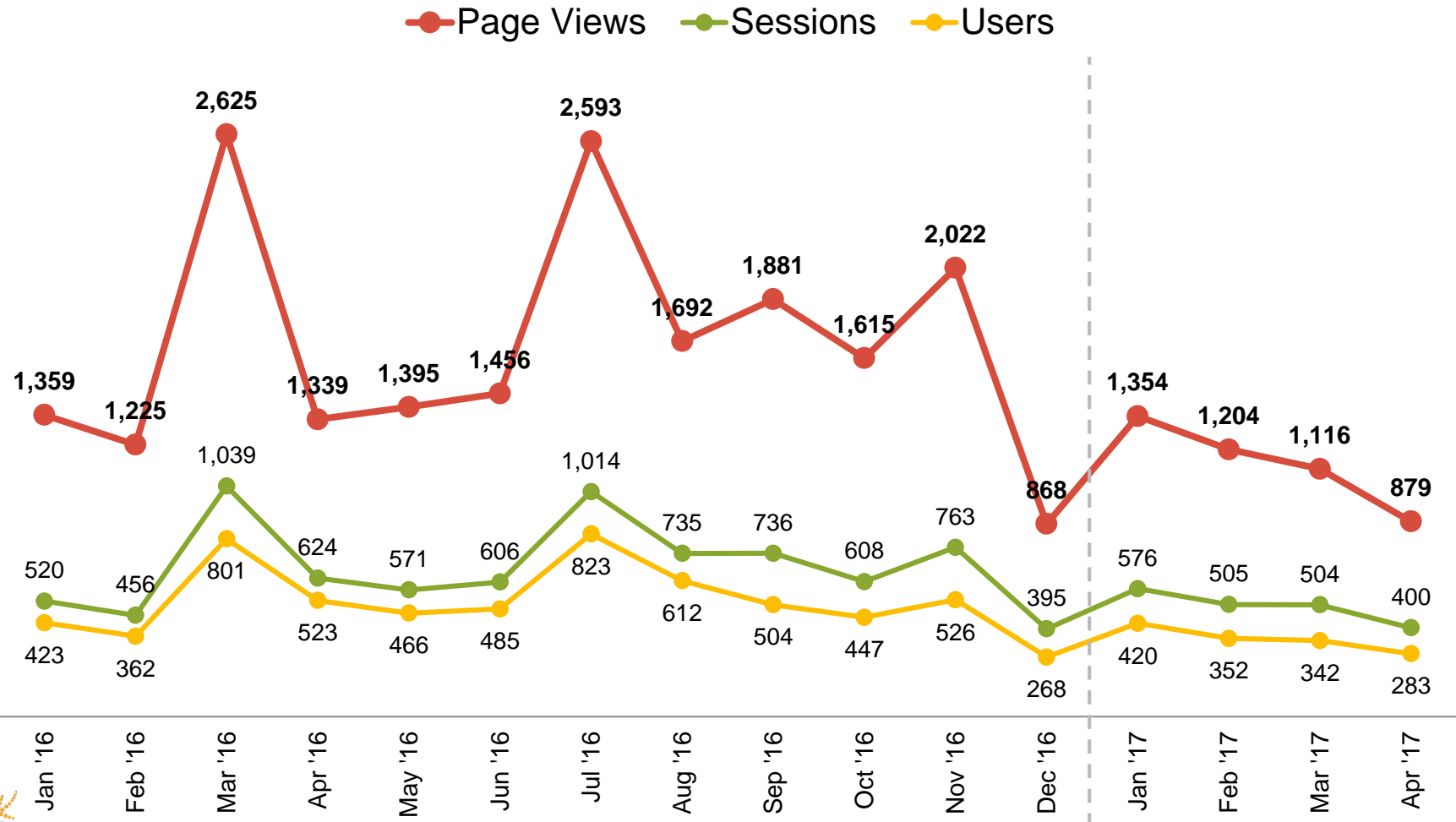
1. Issued press release June 12 to coincide with presentation at ARF on data modeling for TV.
2. May newsletter achieved best open rate ever (32%).

## ➤ *Communications Strategy Document*

## ➤ *Traffic Rate on Website*

# CRE WEBSITE: METRICS

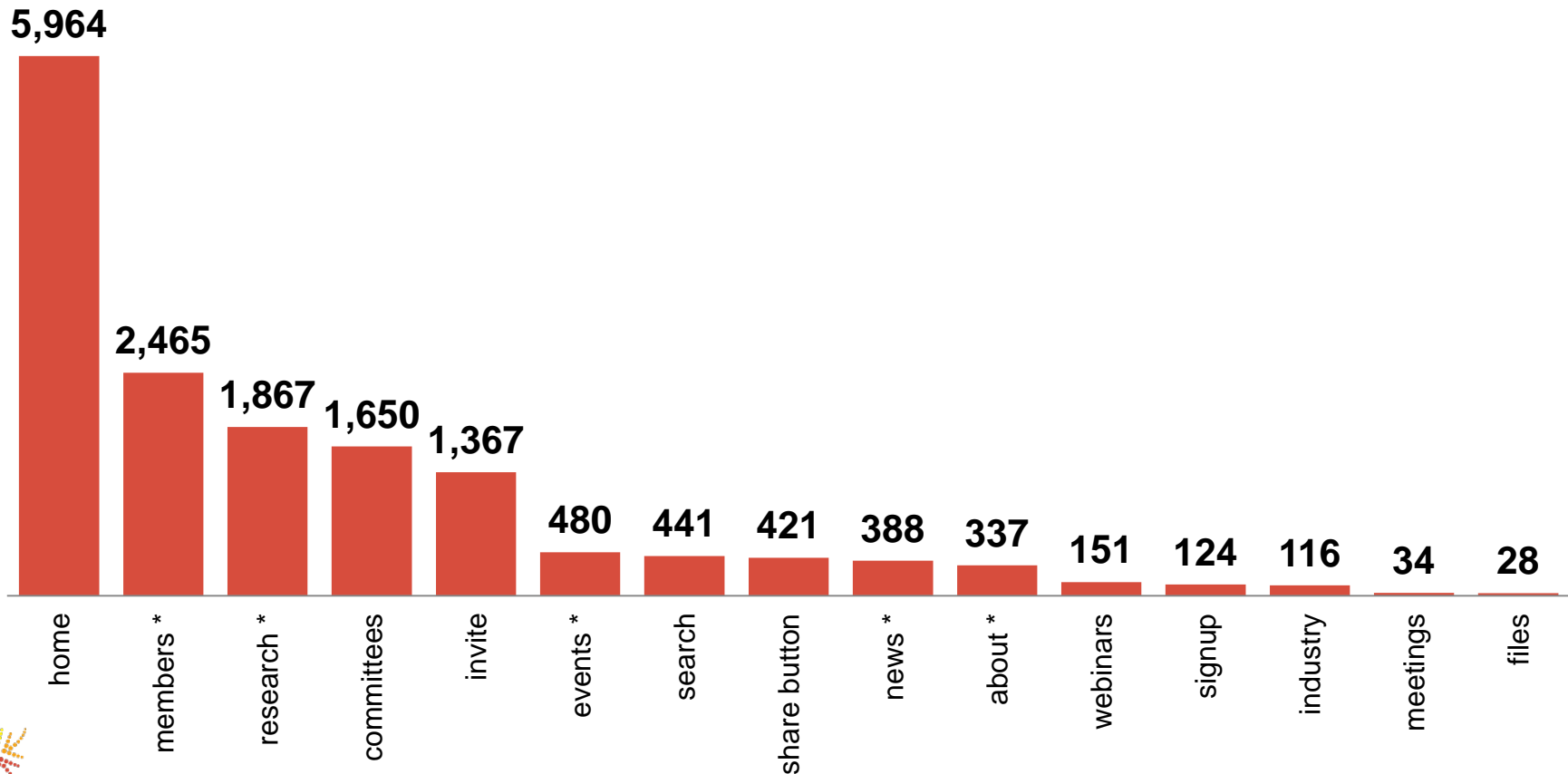
In 2016, March, July and November saw some peaks in website traffic. 2017 showing steady declines since the start of the year.



# CRE WEBSITE: CONTENT

Aside from the home page, “members”, “research” and “committee” pages received the largest number of page views.

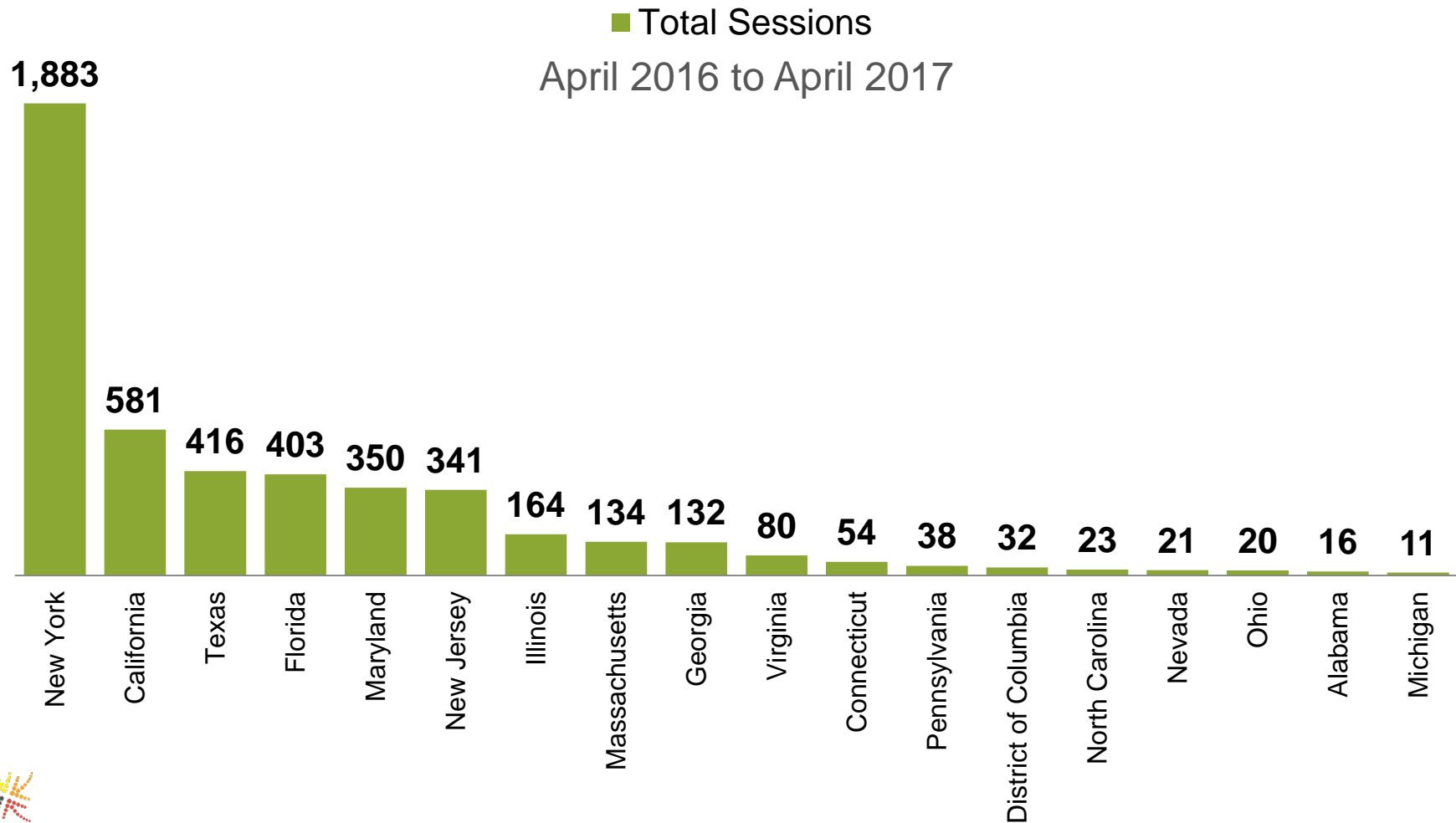
■ Page View Totals  
April 2016 to April 2017





# CRE WEBSITE: TOP LOCATIONS

New York is the top location for CRE site sessions. Texas started out pacing California starting in Nov '16.





**BREAK**





# NEW COMMITTEES





# DIVERSITY

**Annette Malave**

# COMMITTEE MEMBERS

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## > ***Initial Meeting***

- Buzz Knight – Beasley Media Group
- Louis Chesney – Nielsen
- Billy McDowell - Raycom
- Brad Adgate
- Richard Zackon
- Mark Braff

## > ***Additional Members***

- Keenan Pendergrass – WFTV
- Jennifer Newsom (Yarter) – Nielsen (tentative)
- Marsha D. Williams – KSDK - TV

# DIVERSITY ON MADISON AVENUE

Is the council reflective of the population or the industry?

Is it reflective of the audiences that each medium represented within the council is trying to reach?

Industry	Total Employed (000)	Women	Black / African-Americans	Asian	Hispanic/Latino
Advertising/Public Relations/ Related Services	548	51.4%	4.1%	5.0%	12.3%
Radio & TV Broadcasting/ Cable Programming	558	33.0%	14.8%	5.0%	15.0%

# DISCUSSION

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## > ***Initial Meeting***

- Diversity beyond age
  - > Ad community
  - > Communication style and thought
  - > Geographical diversity
  - > Cultural diversity

## > ***Additional Considerations***

- Outreach
  - > Other associations and organizations
  - > Colleges
  - > Working with Millennials

# NEXT STEPS

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## > **Mission**

- Work to develop a mission/goal that is reflective of the CRE
  - > Create specific goals

## > **Research**

- Use data to develop framework
  - > Whitepaper
  - > Best Practices

## > **Proposed Mission Statement**

- A Council whose membership reflect the diversity of the Nielsen client base and which understands the diversity and is representative of the audiences we measure.





# EDUCATION

**Richard Zackon**

# CRE EDUCATION: CONTEXT AND PURPOSE

## Context:

Rapid changes in audience measurement combined with challenges to traditional on the job training efforts have created an acute need to develop professional knowledge and skills. 75% of Nielsen clients look to the CRE for action, up from 55% in 2010 and 65% in 2013.

## Purpose

To create educational opportunities for Nielsen clients and others to further their proficiencies as audience measurement professionals. The material developed can be used individually or as part of corporate research training programs.

# CRE EDUCATION: PROPOSED CURRICULUM

## Basic Media Math

### Knowledge

Media Planning

Buying and Sales

Nielsen Methods

Data Quality

Cross Platform

Survey Sampling

# CRE EDUCATION: CURRICULUM

## Methodological Skills

Data Exploration

Statistical Inference

Forecasting Ratings

Multivariate Methods

Data Modeling

Advanced Analytics

Web Analytics

Statistical Packages

Qualitative Methods

# CRE EDUCATION: CURRICULUM

## Other Skills

Charting

Storytelling

Presentation

Report Writing

Presentation Master Class

Collaboration

# EDUCATION: ACTIONS

Meeting held on May 15 attended by Buzz Knight, Billy McDowell, Annette Malave, Jed Meyer, Heather Birks, Sunil Soman, Brandeis Hall.

A proposed curriculum was presented and two programs identified for initial development

Richard also discussed development of curated content on CRE website containing links to videos, texts and moocs (massive open online courses) relevant for building knowledge and skills for audience research professionals. No bid for this project at this time.

# EDUCATION: INITIAL PROPOSED DELIVERABLES

## 1. Basic Media Math and Audience Measurement fundamentals.

Eight fifty minute online delivered by Richard Zackon with up to 15 participants from CRE companies. Webinar will be available for asynchronous use to Nielsen clients. Final training material to be reviewed by CRE.

## 2. Presentation Master Class

Initially six presentations delivered by effective senior presenters who give insights into data development, story and display. Up to 15 participants. Think *Inside the Actors Studio* for Research.

## 3. More fully developed Curriculum including pricing and timetable

# EDUCATION: TIMING AND FEES

## Timing

Programs and Outline to be delivered by September 28, 2017.

## Fees

Price for initial deliverables \$24,000





**NIELSEN R&D**

**Christine Pierce**



# RESEARCH UPDATE

June 2017

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## > ***Big Data – Transparency & Validation***

- Device Graphs – linking people to devices.
  - How strong are the links? What is the coverage of the population and of devices?
- Extending Big Data Validation Study - Mobile and/or Offline/Address
- Location Data

## > ***Over-the-Top Dynamics***

- Growth in virtual MVPD's

## > ***Outliers & Fraud***

- Methods for detection and removal of fraud
- Methods for mitigating legitimate but influential outlier behavior in panels



# NEW BUSINESS





# CELEBRATION





**ADJOURN**

