



Investing in Digital Research-on-Research in a World of Evolving Choices



Digital Committee Objectives

Objective: Advance the knowledge and practice of methodology explicitly as it pertains to Digital (including cross-platform) Research

Phase I: Creation of an Educational Framework to serve as guidance in terms of making informed CRE investment decisions in Digital Research



cre

council for research excellence

Digital Committee Members

Beth Rockwood, Discovery

Beth Uyenco, Microsoft

Brad Adgate, Horizon Media Interactive

Dan Murphy, Univision Interactive

Daria Nachman, ABC

David Ernst, Discovery

Debbie Solomon, Mindshare

George Ivie, MRC

Jenni Wisniewski, Leo Burnett/Arc.

Kate Sirkin, Starcom MediaVest Group

Laura Cowan, RJC

Liz Nash, Deutsch Inc.

Mainak Mazumdar, Nielsen

Michele Buslik, TargetCast TCM

Richard Zackon, CRE Facilitator

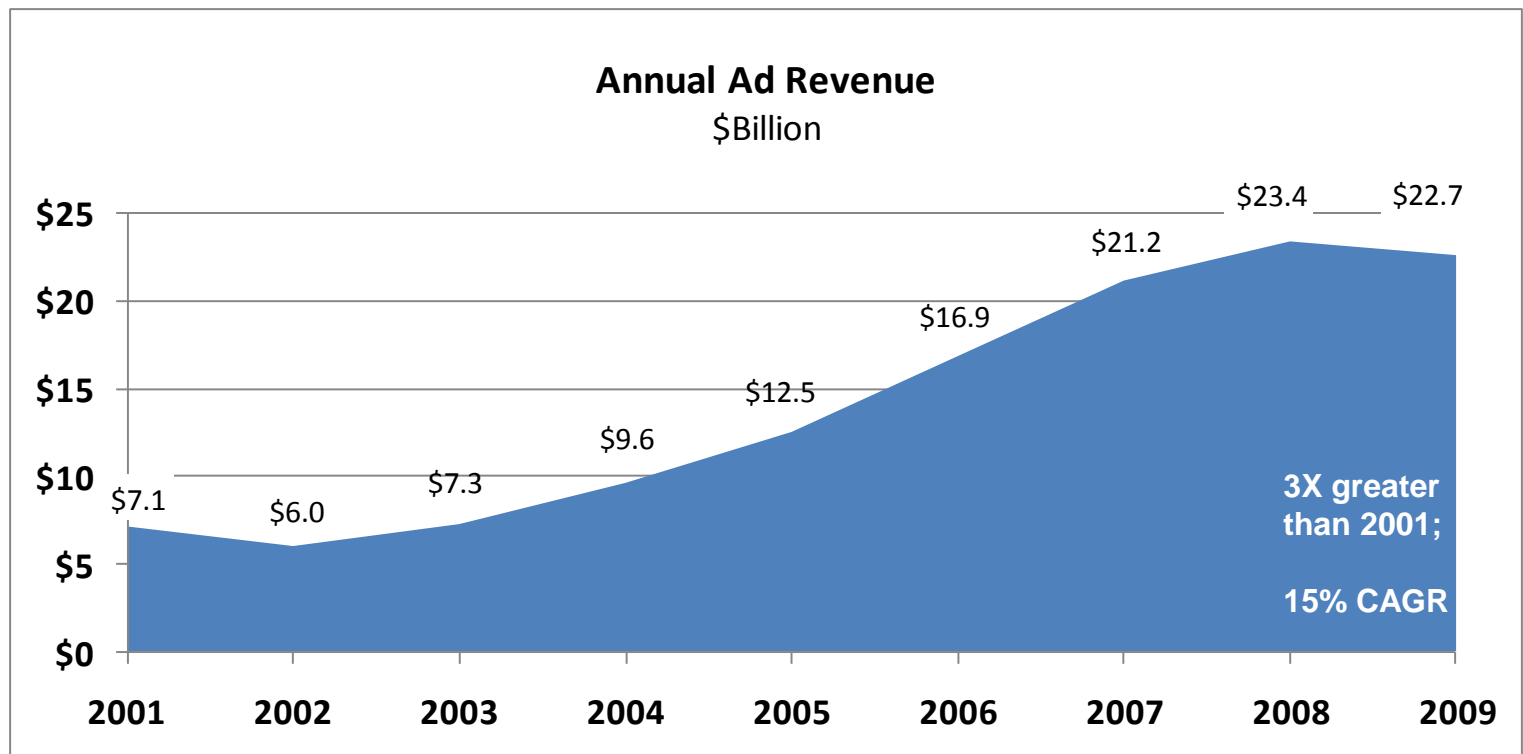
ShariAnne Brill

Sherrill Mane, IAB

Tim Dolson, Nielsen

Outline/Agenda

- Challenges in Digital Research
- TV Media Workflow vs. Digital Media Workflow
- Challenges in Digital Research - Redux
- Possible Next Steps





A snapshot of Today's Biggest Digital Research Challenges

The Digital Media Workflow Suffers from many friction points

- Today's digital currency **ad impressions (NOT audience)**, is from multiple and inconsistent sources.
- Part of the inconsistencies are driven by the many **Digital Ad Formats** and their respective objectives.
- There are a variety of **metrics** from different providers throughout the process
- Digital's **Long Tail** creates many pieces of un-measured and un-measurable media
- Proliferation of media consumption **devices** means change is constant
- Digital **lexicon** does not coincide with Broadcast lexicon

Media Process Steps

NIELSEN C3 Remains consistent metric throughout the process



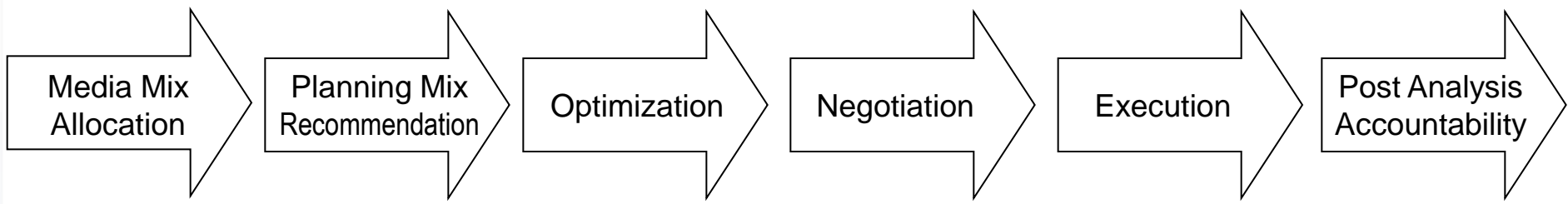
Plan



Buy



Post



TELEVISION

Nielsen IAG MRI Simmons NCS Client Specific Data	Nielsen (C3)	Nielsen (C3) Client Specific Data
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Today's Media Workflow

Largest issue: Digital sells Impressions and NOT audience



Plan



Buy



Post

ONLINE

Audience Size/ Profile

(comScore, Nielsen Online)

Server Metrics

(Quantcast, Omniture)

Audience Affinities/Behavior

(@Plan)

Behavioral Targeting

(Audience Science, Advertising.com)

Ad Networks / Ad Exchanges

(Rubicom)

(DrivePM)

Publisher Ad Servers

(DoubleClick DfP & DE, Acctiper, RealMedia)

3rd Party Ad Servers

(DoubleClick DfA, Atlas DMT, RealMedia)

Legend:

Primary Currency,

Gating Secondary Currency

Currency

Impressions ≠ Audience

Server Metrics

(Quantcast, Omniture)

Ad Effectiveness Studies

(Dynamic Logic
Insight Express
comScore)

ROI Studies

(Marketing Evolution)

Metrics: Ad Impressions , Visits, Unique Visitor (Panel), Unique User (Cookie-Server), Duration, Page Impressions



Television: Digital Workflow Variances

A Mature vs. Nascent business model

Television

- Mature traffic system
- Automated reliable inventory control
- Routine pricing information
- Automated billing
- Nominal discrepancies
- Highly evolved best practices across industry
- Straight forward creative formats

Online

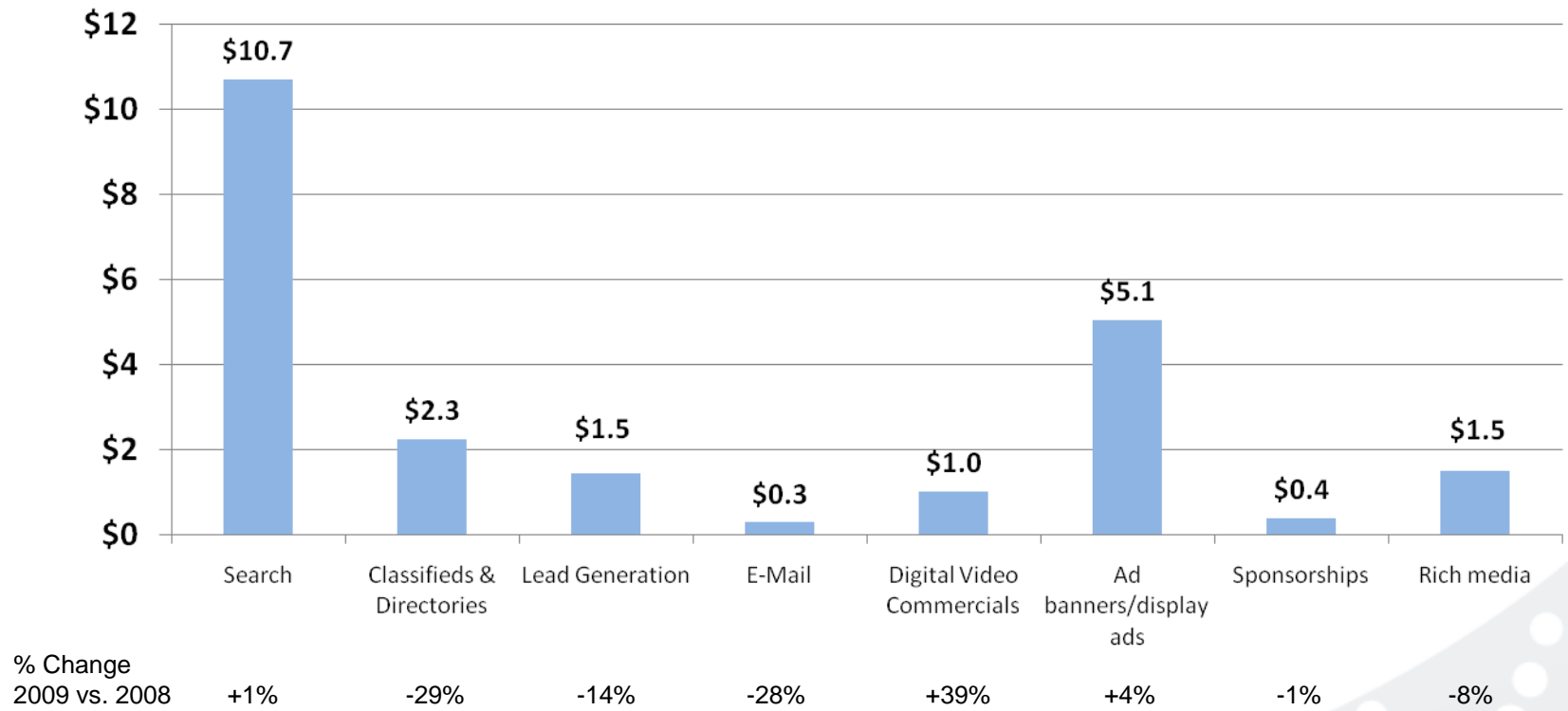
- Evolving Traffic System
- Manually intensive forecasting
- Non-scientific pricing
- Manual billing
- Material 3rd party discrepancies
- Digital industry best practices in nascent stage
- Multiple creative formats

2009 Online Ad Formats & Growth

Multiple Digital Ad Formats drive the need for corresponding Metrics

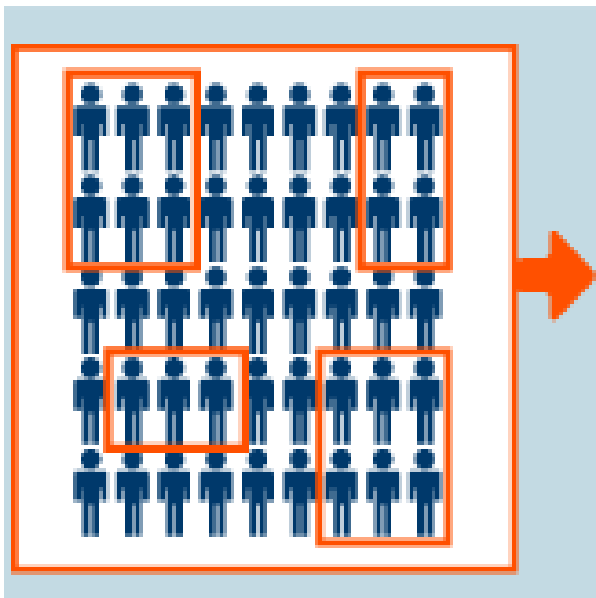


2009 Ad Revenue by Format
\$Billions



Hybrid (Panel/Server) Audience Measurement

“Claritas integrated with Nielsen TV Ratings”



THE AUDIENCE TARGETING TABLE OF ELEMENTS

Presented By **AudienceScience**

Section Classifications

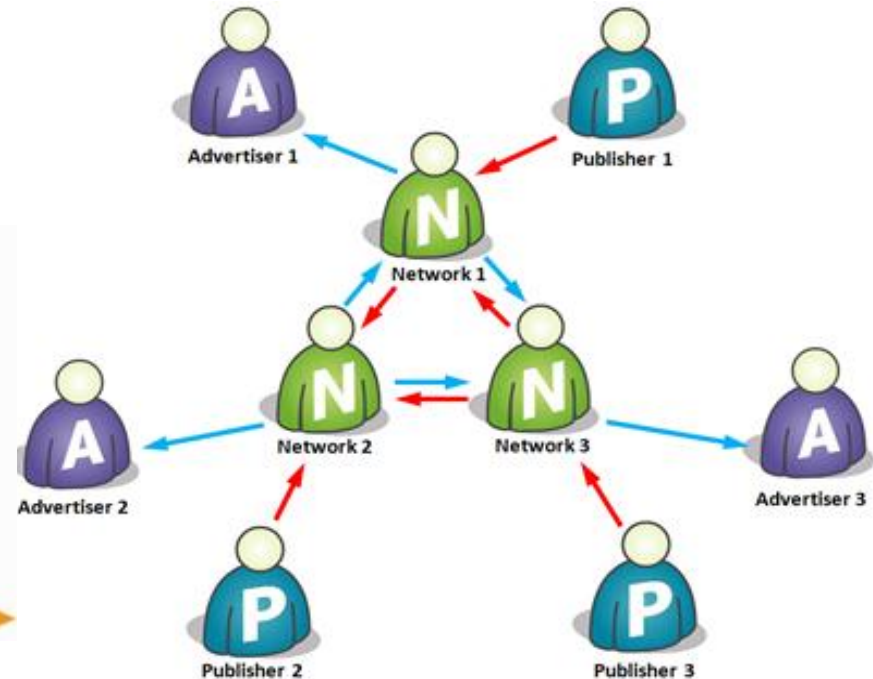
- Auto
- Entertainment
- Finance
- Lifestyle
- Health
- Shopping
- Technology
- Travel
- Seasonal
- Influencers

A Action Imports																			Bt Business Travelers
Ae Auto Enthusiasts	As Auto Shoppers																	Lv Lux Vegas Travelers	
Ci Crosser Travelers	Db Domestic Shoppers																	Ot Outside Travelers	
Ec Economy Interests	Hs Hybrid Shoppers	Af Action Fans	Bw Book Worms	Fs Family Shoppers	Al Auto Loans	Bd Business Decision Makers	Ge Gift Enthusiasts	H Huge Fans	Lm Life Milestones	Ny New York Reaction Makers	Bs Back to School Clothing & Supplies	Bc Budget Conscious	Ce Cell Phone Travelers	Cv Car Vacationers					
Ai Auto Influencers	Lb Luxury Buyers	Cf Comedy Fans	Db DVD Buyers	Df Drama Fans	Cs Career Seekers	Ca Credit Card Applicants	Aa African American	Oe Outdoor Enthusiasts	Pi Political Influencers	Ac Affluent Consumer	Bf Beauty & Fashion	Fs Pet Clothing Shoppers	Co Computer Shoppers	Vi Vegas Travelers					
Pe Performance Enthusiasts	Sb SUV Buyers	Hf Horror Fans	Ei High End Influencers	Mg Movie Goers	Es Education Savants	Ha Home Accommodations	Ea E-Systems Enthusiasts	Pm Politically Motivated Millennials	Pp Proud Parents	As Aid Shoppers	Hh Home Improvement Enthusiasts	Hi Home Improvement Shoppers	Gl Gadget Lovers	Wv Wine & Spirits Travelers					
Ss Sedan Shoppers	Tb Truck Buyers	Ml Music Lovers	Rs Sports Shoppers	Tv TV Enthusiasts	Re Real Estate & Mortgage Shoppers	Rp Real Estate Professionals	Fe Football Enthusiasts	R Retro	S Single	Df Dad & Fitness Enthusiasts	Pl Pet Lovers	Sp Spring Seasonal Shoppers	Hg Holiday Gadget Shoppers	Wt Winter Travelers					
Uc Used Car Shoppers	Vm Van/MVW Travelers	Wi Women Influencers	Vi Video Game Influencers	Vg Video Gamers	So Small Business Owners	St Stock Trader	Bi Business Influencers	Sb Sports Buffs	Mp US Military Personnel	Hw Hobby & Wellness Enthusiasts	Su Summer Seasonal Shoppers	Ws Winter Clothing Shoppers	It IT/Computer Savvy	Travel					
Auto		Entertainment			Finance		Lifestyle		Health		Shopping		Technology						

Hybrid (Panel/Server) data (code/pixels) fill gaps from Home/Work panels. The underlying code permits enhanced Behavioral Targeting (BT). This can be coupled with other data sources for enrichment. The same data also creates not only data rights, usage and control but just as important privacy issues.

Long Tail Advertising

Via Ad Networks/Exchanges



Hybrid Audience Measurement provides better visibility into Long Tail. Buy-side campaigns can be made more efficient by leveraging long tail inventory on a myriad of niche sites accessible through ad networks and exchanges.

Clear need for Transparency & Accountability – IAB guidelines for Ad Networks & Exchanges released June 2010.

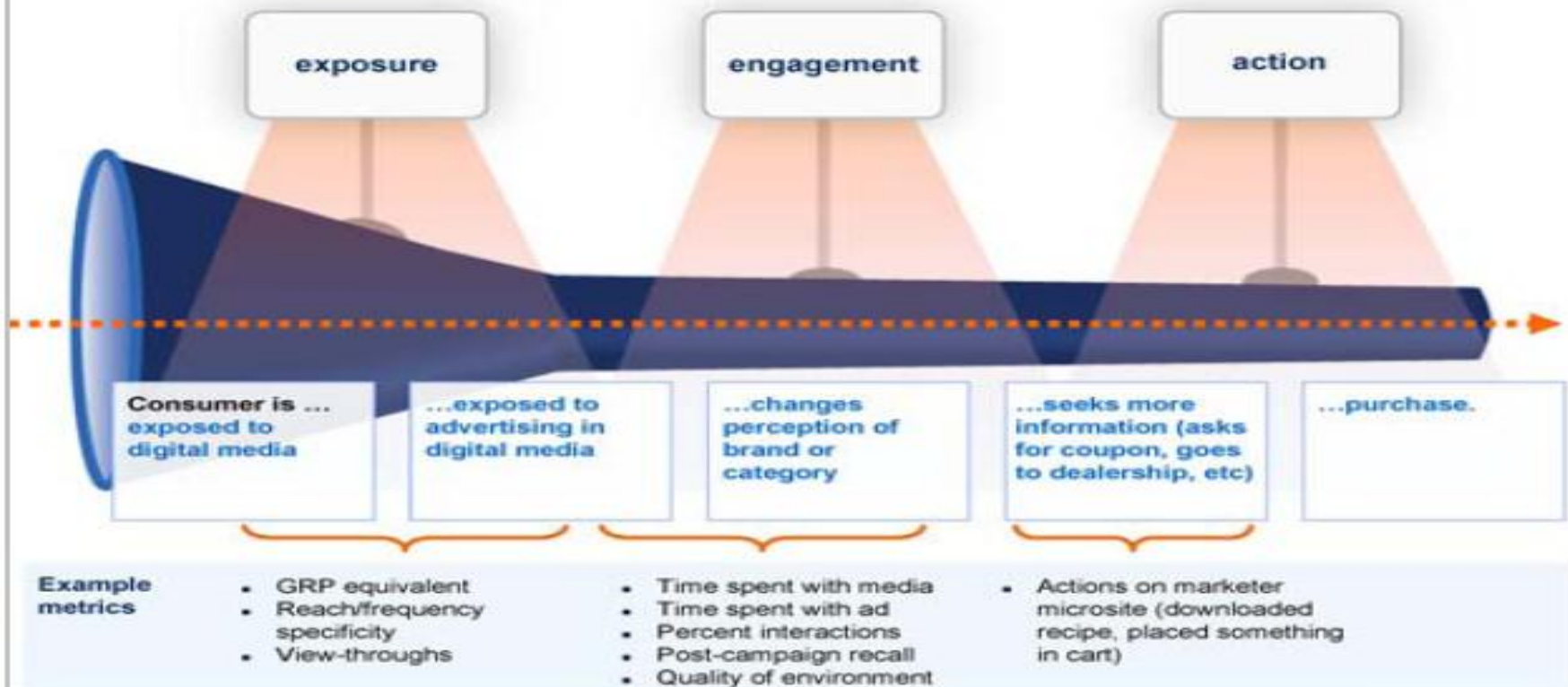


Convergence in the Purchase Funnel

Future metrics should address business objectives

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Measurement spectrum





Universe Estimate Challenges

Better understanding the full span of media devices



Media Consumption Devices:

- TV & PC Monitors
- Laptop Computers
- Electronic Books & iPads
- Wireless handsets/SmartPhones
- Stereo – Car, Home or Computer Speakers



Media Processing Devices

- Game Stations (Xbox, PS3, Wii, Gameboys, etc.)
- Desktop Computers
- Wireless Routers
- BlueTooth



Media Sources

- Terrestrial Antenna
- Cable or Satellite Box
- Internet Connection
 - Wired – Cable, DSL, Phone
 - Need to assess Bandwidth



Today's Media Workflow

Hybrid, Ad Effectiveness Studies and Ad Exchanges



Plan



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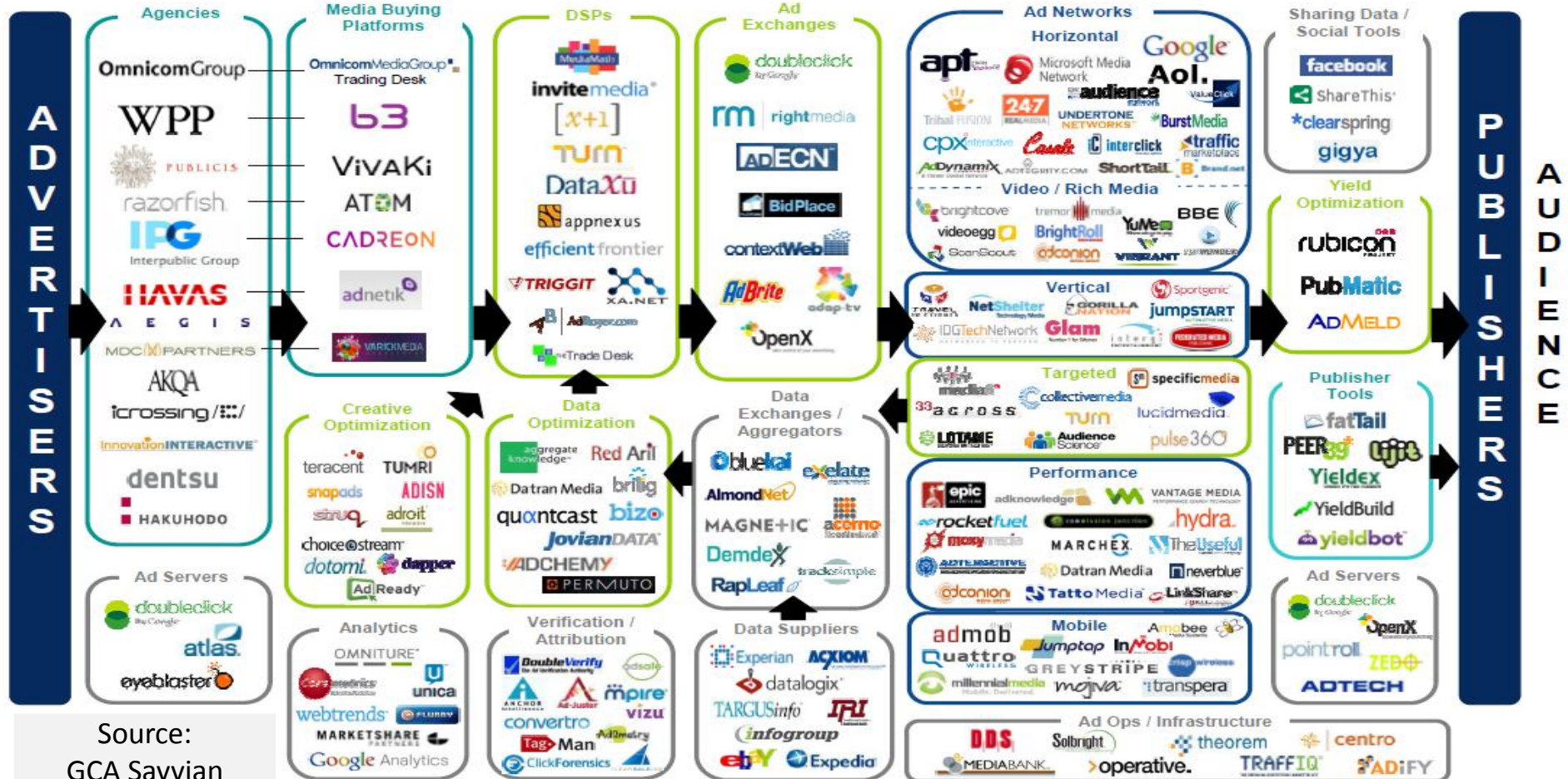
ROI Studies

(Marketing Evolution)

Metrics: Ad Impressions , Visits, Unique Visitor (Panel), Unique User (Cookie-Server), Duration, Page Impressions

Today's Media Workflow II

The Crowded Display Ad Tech Landscape



Source: GCA Savvian

Today's Digital Research Challenges - Redux

Taking a step back and looking at the big picture

1. Audience Measurement & Accountability metrics
2. Audience Measurement & Accountability metrics
3. Audience Measurement & Accountability metrics

Hybrid Measurement – Behavioral & Long Tail

Universal Pixel - User Privacy, Publisher/Advertiser rights

Accountability Metrics – Performance & Branding

Consistency – Impression discrepancies, “GRP”s, Reach/Frequency, Attribution

4. Universe Estimates
5. Non-Response Issues
6. Ad Effectiveness testing
7. The future of surveying (AAPOR)





Possible Next Steps for CRE

“Digital” Watermark – Universal Pixel/Content Code

Addressing evolving technical issues – e.g., page loads/user experience

Data Controls for Publishers, Agencies and perhaps Consumers


Standardization, Long Tail visibility

Potential to address both Audience Measurement & Metric Issues

Ad Measurement and Digital Ad Formats

Possible additional steps

Reactive and Proactive Next Steps

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- **Universe Estimates**
 - The UE committee is considering expanding their project into a second market (To see if similar results). We have already found some areas for further investigation and have come up with some suggestions for Nielsen. The UE and Digital committees should work together to make sure all relevant data are being obtained.
 - **Non-Response**
 - Similarly the Non-Response committee has seen patterns of non-response and believe there are likely other patterns coming from emerging media. The Non-Response and Digital committees should work together to propose areas of exploration.
 - **Ad Effectiveness Testing**
 - Further current Research on existing Ad Intercept methodologies
 - **The Future of Surveying**
 - Build upon the work recently done by AAPOR to investigate possible methods of getting ahead of possible issues coming from Cell-Phone Only related issues

Possible Next Steps...



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Thanks to committee members