



Minutes from Quarterly CRE Meeting
September 12, 2013
Concierge Conference Centers
New York, NY

Members In Attendance: Brad Adgate, Joanne Burns, Laura Cowan, Janice Finkel-Greene, Janet Gallent, Hadassa Gerber, Tanya Giles, Jeffrey Graham, Mark Kaline, Pat Liguori, Jed Meyer, David Poltrack, Beth Rockwood, Bryon Schafer, Stacey Schulman, Ceril Shagrin, Ira Sussman, Emily Vanides, Jack Wakshlag and Tom Ziangas,

Present by Phone: Cheryl Brink, Michele Buslik, Billy McDowell, Keenan Pendergrass, Kate Sirkin and Sharon Warden

Absent: Alex Corteselli, Paul Donato, Ed Gaffney, Nancy Gallagher, George Ivie, Dan Murphy, and Robin Thomas

Also Attending: Randall Beard, Tom Campo, Shelley Drasal, Isabel Harrison, Michael Link, Dave Marans, Andrew Somosi, Richard Zackon

Ceril Shagrin called the meeting to order at 1pm.

Words from the Facilitator

Richard Zackon acknowledged that too much time goes by until the meeting transcript is reduced to minutes. Minutes should come out six weeks after the meeting, given that it takes three weeks to get the transcript.

Richard also acknowledged he had not followed up with Nielsen about the issue concerning Wall Street clients getting appropriate reports. Ira said that Nielsen is working to find the right balance.

Finally, Richard acknowledged that he did not get to Janice Finkel-Greene a name of a recommended text on Big Data. The name of the book is *Big Data: A Revolution That Will Transform How We Live, Work, and Think* by Cukier, Kenneth and Mayer-Schonberger, Viktor (Mar 14, 2013). All in attendance were promised a hard copy or an eBook.

Innovation

Randall Beard is Global Head of Nielsen's Advertiser Solutions, a group focused on advertisers and agencies. Its framework of thinking is the three R's: Reach, Resonance and Reaction. Randall discussed initiatives at the new Innovation Lab. When clients ask challenging questions which none of Nielsen's current solutions answer, Nielsen brings them to the new facility. The facility is virtual and was created in partnership with Stanford University. The Innovation Lab is led by Scott McKinley who works out of the Bay area and comes from the world of technology startups. The key focus areas of the lab include Social, Mobile, and ROI.

Randall highlighted three projects. The first is Media Plan Simulation. The lab is looking at seeking to improve the ability to predict brand and sales impact. The lab is using media simulation to estimate impact and also uses agent based modeling. Dave Poltrack raised concerns about the comparisons being made between marketing mix modeling and its alternatives. Randall replied that Nielsen is seeking to prove that the modeling it is doing is valid and is a good starting point. There are a number of areas of marketing mix modeling that remain open to questioning. Jack Wakshlag asked where this data came from for this agent based modeling. Randall responded that it came from Nielsen in some cases and the client in some cases.

The second initiative is a partnership with IBM using their Watson Technology. Watson is a natural language engine to aid data mining. It understands human communication, generates and evaluates evidences-based hypotheses and adapts and learns from training and user responses. People may recall that Watson won a special *Jeopardy* Contest. Jeffrey Graham asked about specific questions and Randall responded that it is an alpha pilot. Ceril Shagrin asked about accuracy with Watson. Randall responded

some of Watson's answers can be empirically tested and some are open to judgment. Randall replied to a question from Pat Liguori and said that Watson has not yet demonstrated the ability to integrate structured and unstructured data. Right now, the focus is on answering basic questions. Agent based modeling may help address the relationship between the media plan and sales.

The third initiative is around next-generation attribution modeling and marketing mix modeling. The issue is to get micro scale in marketing mix modeling. They are looking at a potential solution called Multi-Touch attribution modeling. The effort is cross-platform, on-line and off-line and seeks to bring rigorous measurement science to traditional marketing mix modeling. Nielsen has partnered with a company called Convertro.

Bryon Schafer asked about how Nielsen was learning about agency media planning tools. Randall reported senior people from the agency world are leading the investigations and they have spoken to a lot of different agency clients. Hadassa Gerber asked about success criteria. Randall said it is primarily about client learning but also about innovation and knowledge creation. Beth Rockwood asked about work on existing Nielsen products on the resonance and reaction side. Randall said that is being addressed by the Nielsen product development organization.

Ceril said we would look to set up a webinar to go into more detail.

Steering Committee

Pat Liguori acknowledged the Council Members for their quick turn-around time in approving the additional funding for the Social Media Committee.

Pat also informed the Council of two membership requests. One from Susie Thomas who is SVP of Research & Insights at Palisades Media Group and the second is from Artie Bulgrin, Senior Vice President, Research & Analytics at ESPN. The Council approved both candidates.

The Steering Committee is planning a meeting with CRE chairs and Nielsen Management including Lynda Clarizio, the new President of US Media. She will also be invited to the next quarterly meeting.

Pat reported the Steering Committee decided that attendance requirements at CRE meetings apply to Nielsen members.

Finally, Steering looked at projects, which relate to development products at Nielsen. Ira Sussman is reviewing the issue with Nielsen.

Treasurer Report

Richard Zackon reported we have spent \$1.7 million to date and have \$826,000 remaining to be spent in 2013 on research projects. Richard reminded the Council the money cannot be rolled over into the following year. Ira Sussman said he would inquire about funds for 2014. Ceril said it was important to know by December.

Nielsen Twitter TV Rating Update

Andrew Somosi discussed the new TV Twitter ratings. It measures unique reach and impressions and identifies what drives those impressions: organic (earned), talent (owned) and paid.

Twitter TV reach is on average 50 times the number of authors and can even exceed TV reach. It varies by program type.

Members asked a large number of detailed questions and there was insufficient time to ask them. Andrew made himself available for a subsequent webinar.

Digital Committee

Bryon Schafer brought a new digital video project to CRE seeking approval of funds. The aim of this study is to help understand the impacts of internet technology and video platform proliferation on video viewing practices. It will examine how people talk about, think about, value and, ultimately, use these technologies in relation to their current television/video viewing practices and attitudes, as well as relationships with other technologies (such as the DVR).

The key research questions are:

How does the viewing of video differ by device in the connected home, and outside of the home as well?

How do so many viewing variables (and dimensions to these variables) interact and impact approaches to video viewing?

Seven different suppliers submitted proposals and after several meetings, the committee recommended GfK. The tiebreaker was a well-written response from GfK to how this study will improve methodology,

The ethnography will be conducted on 100 representative households. Viewing will be observed and discussed. A special tool kit will capture data beyond the ethnography. GfK will engage participants once or twice a month up to two years. Total cost of the study is \$1.4 million, with \$721,000 for the first year. CRE has the right to terminate after a year.

Stacey Shulman recommended a sub-sample with accelerated device ownership. The question remains about replacing households that drop out of the study in the second year. Jack Wakshlag insisted that we not look for quantitative measures of change overtime in a qualitative study.

Bryon moved for approval of \$1.4 million over two years with up to \$400,000 being spent in 2013. Project was approved with no objection.

Sample Quality Committee

Ceril reported plans on the October 8, 2013 CRE event on Local Measurement. Sample Quality and Local Measurement will be presenting results from their prospective studies. Ceril shared some early findings from the Sample Quality study. The results will show that Nielsen has improved the sample by including cell phone only households, but some bias remains. Various weighting schemes are being explored to reduce bias. A webinar is planned for October 2nd to share results with the Council.

Ceril reported that Nielsen came to the Sample Quality committee to do some research on effectively recruiting Asians. Ceril reported that the cost would be \$100,000 in 2013. Jack Wakshlag asked whether the study would be done by Nielsen if the CRE did not fund. Richard said it would not. Michael Link said that the \$100,000 is to learn best practices from outside experts. A motion was made to commit \$100,000 of 2013 funds for the first phase. The motion was seconded and the Council voted and supported the funds. Ceril said additional funding for 2014 may be considered in December.

ROI Committee

Dave Poltrack addressed the upcoming event on September 20, 2013 presenting a comprehensive set of finding from the study on marketing mix modeling. Jim Spaeth and Alice Sylvester will be presenting with commentary from the heads of the ARF, ANA, the 4 A's and the MRC. There will be commentary followed by a panel. Jim and Alice will also be presenting the findings at an upcoming ARF leadership forum.

Social Media Committee

Beth Rockwood thanked the Council for approving by email funds to add Nielsen convergence panelist and teens 15-17. Recruitment for the mobile panel has begun, and is going smoothly. Beth reported that her committee is beginning to look at how advertising plays into the context of social media and television. She also reported discussions with Mike Hess on Granger Causality and is considering social media data sets beyond twitter. Janet Gallent acknowledged how helpful the work was of the

Social Media Committee. Jeffrey Graham inquired as to what the additional data sets were and Beth replied her committee is at the beginning and more is yet to come.

Local Measurement Committee

Billy McDowell spoke to the upcoming Local Measurement Mini Summit on October 8, 2013. BIA Kelsey will be presenting its review on relative error in Nielsen diaries. He announced that on September 17, 2013 there will be a webinar previewing this report for the CRE. In addition, at the mini summit, Billy will present findings from a study that Raycom conducted with Nielsen at the University of Alabama using Nielsen's "Watcha Watchin'" technology, an electronic diary.

Big Data

Stacey Schulman has reported that her committee has been very busy. The committee is working on a Big Data primer for the industry and is considering a wiki to develop it. An NYU intern has been assisting on the project. Stacey requested \$1200 to develop an online resource. Richard reminded the Council that an active committee chair can spend up to \$10,000 per annum without a vote.

Media Consumption and Engagement Committee

Laura Cowan reported that the MCE committee had forwarded to the Insights to Practice Committee the results of its mobile study. The committee is looking forward to working with the Digital Committee on the upcoming ethnography. It is also considering a conversation comparing impressions across platforms. She reported discussion with Jack Wakshlag on a possible media acceleration project.

Hadassa Gerber reported a new effort looking at the impact of commercial pod length. She invited the Council to a conference all on October 2, 2013.

Return Path Measurement Committee

Pat Liguori reported the next installment on the One Touch Intelligence RPM report is due in fourth quarter.

Insights to Practice

Richard Zackon spoke for Nancy Gallagher who was not in attendance. Three committees are preparing reports of their research: MCE, Social Media and ROI.

Communications Committee

Emily Vanides spoke to a high level of recent CRE activity: two live events (Social Media, MC&E Mobile), three webinars and over 500 recipients for the newsletter which is now released every other month rather than quarterly. We have two upcoming events (ROI and Local Measurement). Tom Campo spoke to the favorable press treatment.

Emily said we are planning a client survey in October, three years after the first. There will also be some presentations of CRE research at CMRE and WOMMA.

Education Committee

Jed Meyer, the new Chair of the Education Committee, spoke of sharing the excitement of working in the media research space to build the pipeline for the future. He invited CRE members to accept the request from Gary Corbitt and to adopt a local professor and work with the university in their area.

Stacey Schulman and Pat Liguori discussed using the website to connect with educators. Laura Cowan suggested a Meet the CRE for the academic community. Jed encouraged CRE members to join his committee.

Nielsen Updates

Michael Link reported that there has been a shift in measurement science regarding the CRE since Sangeeta attended the June meeting. This can be seen in greater participation at committee meetings. Sangeeta is seeking to support the CRE mission.

Ira Sussman noted a higher level of interest as well with Nielsen client business partners. It is important for Nielsen leadership to understand what the CRE is doing. Ira also supported the idea that Nielsen bring methodological projects, which would otherwise be unfunded, to CRE for consideration. Ceril mentioned that CRE members also bring additional expertise to research than Nielsen might bring.

New Business

Tom Ziangas requested that Nielsen give a little lead-time to CRE research committees before publicizing studies to the press. Other members agreed, although questioned whether it is a CRE issue. Ceril requested that Nielsen share at our CRE meetings the special studies and analyses that they are working on. Michael Link suggested including Nielsen analytics in the work of the CRE. Jack Wakshlag claimed that this is not a CRE issue.

Richard Zackon presented some new business issues. He recommended the CRE invite Pete Fader from the Wharton School to work with us to deliver a ½-day webinar/seminar on media modeling and analytics. Bryon Schafer suggested a brown bag seminar series of experts to contribute to our research team.

Richard then spoke to how we invite Nielsen clients to participate but there is not always room on committees for them to serve. Hadassa suggested that we reach out to clients individually and asked why more than 15 people serving on a committee poses a problem. Richard replied it is difficult to schedule meetings with that many people.

Richard spoke to three issues of best practices for committees: Membership, Process, and Communications.

Regarding Membership, he suggested 15 members maximum, 50% attendance required and all committees should have a vice chair.

Regarding Process, he suggested working sub groups (3-6 people are recommended), and each committee should have a two-year research agenda and financial plan and should maintain current project status sheets.

Regarding Communications, a regular meeting time is recommended. Chairs should be on time for all calls, and CRE Coordinator Shelley Drasal should be used for doodle, and meeting invites.

Emily Vanides suggested that we be vigorous with the attendance rule on oversubscribed committees, to make room for Nielsen clients who really want to join. Pat Liguori suggested that chairs of oversubscribed committees keep lists of people who want to join.

Janet Gallent did not want to see people turned away and spoke to the value of inclusiveness. Pat Liguori was concerned that people who miss meetings take you backwards. Hadassa was unaware of the 50% attendance rule. Laura Cowan saw it as varying by chair. Richard noted the number of committee members is at an all-time high. Jack Wakshlag suggested that Richard speak to people not participating and let them choose to attend or no longer be on the committee. Richard suggested a quarterly attendance report by committee.

Richard raised the question of meeting length and frequency. The idea of optional webinars between quarterly meetings was discussed to give greater depth to topics of interest.

Richard suggested that we give some time at meetings to share specific learnings with one another. He gave an example from Kahneman's *Thinking Fast and Slow* in which the point is made that people learn more about

behavioral science from human examples rather than statistics. It explains why it works to include short video interviews in a long research presentation.

A member suggested we share upcoming conferences with each other. Perhaps members can submit conferences they hear about to Tom Campo to include on his weekly clippings.

Joanne Burns requested that the opening question at the meeting be shared in advance to allow more time to consider a response

Adjournment

Ceril adjourned the meeting at 4:31 p.m.