

Minutes from Quarterly CRE Meeting
March 12, 2015
Convene Conference Centers
New York, NY



Members in Attendance: Joe Abruzzo, Brad Adgate, Joanne Burns, Paul Donato, Janice Finkel-Greene, Nancy Gallagher, Janet Gallent, Hadassa Gerber, Jeffrey Graham, Buzz Knight, Pat Liquori, John McMorrow, Jed Meyer, Dan Murphy (Bridge Member), Stacey Schulman, Ira Sussman

Present by Phone: Kathleen Bohan, Cheryl Brink, Mark Kaline (Bridge Member), Tony Marinaro, Billy McDowell, Keenan Pendergrass, Andy Rainey, Beth Rockwood, Bryon Schafer (Bridge Member), Ceril Shagrin, Howard Shimmel, Robin Thomas, Susie Thomas

Also Attending: Michele Buslik, Mark Braff, Tom Campo, Laura Carpentier, Lynda Clarizio, Shelley Drasal (by phone), Diane Laura, Christine Pierce, Horst Stipp, Emily Vanides, Richard Zackon

Absent: Artie Bulgrin, Ed Gaffney, Tanya Giles, George Ivie, David Poltrack, Judy Vogel, Tom Ziangas

Opening

Ceril Shagrin called the meeting to order at 1:01 PM. Ceril shared that she and Richard Zackon met with Lynda Clarizio and Ira Sussman prior to the December meeting, and that it has now become standard practice for them to do so.

Ceril also reported that she and Richard had also spent a good part of an afternoon with Nielsen at the Oldsmar Facility as part of their Outside-In program. It gave them the opportunity to speak with many people that did not really know what the CRE was about or the work that the CRE did. They also met with the Data Science group (formally the Measurement Science group) and had a great dialogue regarding what was on their minds and what questions they are trying to answer.

2015 Vision

Richard commented that at the meeting with Lynda, it was suggested that it would be helpful if the CRE put forth a statement for the upcoming year as to what they are planning.

Richard shared seven items as part of the 2015 vision

1. Focus on methodology: Identify and solve critical measurement problems
2. Articulate coherent research agendas
3. Achieve genuine progress on Cross-platform metrics
4. Increased attention to Digital and Audio measurement issues

5. Deliver a series of highly thoughtful Client events:
 - What Is It to Watch TV?
 - Validating Modeled Data
 - Collaborating with Data Scientists
6. Bring new contributing members onto the CRE to fill the 40 seats
7. Grow cooperation between CRE and Nielsen consistent with CRE independence

The Council viewed a video by Steven Johnson discussing where good ideas come from.
<https://www.youtube.com/watch?v=eNwMut3-z1Y>

Nielsen R&D Update, Christine Pierce

Christine Pierce thanked Ceril Shagrin and Richard Zackon for the meeting in Oldsmar and attested to its value.

Her first topic was the name change at Nielsen from Measurement Science to Data Science. As Nielsen moves to include more organic data, it remains important to bring methodological vigor just as it does with samples and panels. It is a broadening of the talent pool beyond statisticians, mathematicians, behavioral and social scientists. The concern day in day out is the accuracy of data, accuracy regarding both variability and bias.

Christine was asked to speak about Nielsen's partnership with Adobe. Lynda Clarizio spoke up at that point saying Nielsen was in the middle of implementation with Adobe and has little to share just yet. She said business progress remains on track with a timeline that had been sent out which is to have a product in market later this year. She also mentioned that Nielsen had recently acquired a company called eXelate, which is a leading provider of audience segments for programmatic exchanges. Jed Meyer asked Lynda about Nielsen's early thoughts on eXelate. Lynda replied it is Nielsen's mission to provide, open, transparent, high quality data in the programmatic world. Jed agreed that standards and quality are an issue. Paul Donato noted that 95% of the quality is determined by 10% of the 200 data sources from eXelate. Stacey Schulman noted that the Big Data committee had recently spoken to Blue Kai about data quality and Lynda said that she would be happy to connect Stacey with the team. Jeffrey Graham asked if Nielsen plans to build out to develop advertising networks and Lynda said no, Nielsen does not intend to become a broker. Taking risks in the inventory compromises independence. Jeffrey also asked to discuss Adobe and mobile. Lynda stated that the Adobe relationship is not exclusive. Dan Murphy stated that the Adobe partnership filled a gaping hole, but he was concerned with meeting deadlines. Lynda questioned some of Dan's claims but insisted that Nielsen was holding to the deadline. Pat Liguori shared Dan's concern about the availability of specifications. Jed indicated there seemed to be a disconnect between Nielsen's marketing message and the deliverables. Pat asked Lynda to speak to the people at Nielsen engineering to get the whole rundown. Lynda said she got what the clients were saying in terms of being in different stages with different parties; it's a new world and business process and marketing need to be aligned.

Christine moved on to discuss methodological rating enhancements. Panel expansions are designed to yield rating stability. Another initiative is the viewer assignment model, which is built on set meter households. It allows an expansion of the national panel by assigning viewers to the set meter. This will allow for greater continuous measurement than the diary provides. It will also mitigate the problem of tuning without viewing.

There is an additional initiative, which is called local rating stabilization, which reduces noise in the estimates. Billy McDowell offered help in terms of research to prepare for the impact on Local Measurement. Christine requested input on what clients wanted to see improved in validation. Christine stated that local rating stabilization and the validation details are to be released in a white paper called "Rating Stabilization."

Regarding national expansion, there are two components: more meters and integrating set meter households. It will have the impact of doubling the sample size. The integration includes modeling demographic viewing based on household characteristics and tuning of that household.

Ira Sussman noted how these efforts would increase effective sample sizes for a lot of new device users. Stacey Schulman asked how increases in new device users will impact traditional TV viewing. Christine replied the impact would be more ratings that are consistent and fewer zero cells.

Steering Committee

Pat Liguori reported on two members of the Council who were attending their last Council meeting, Emily Vanides and Michele Buslik. Since both are employed, but not at Nielsen clients, bridge membership does not apply. Richard acknowledged Michele, as she had been a member of the Council since its inception. Ceril shared in the acknowledgment by stating that not only has Michele been a member, but also an active contributing member. This meeting was also Dan Murphy's last meeting as a bridge member. Richard also informed the Council that Chris Mills was attending his last meeting with the CRE and has provided wonderful support for the Council over the years.

Lastly, Pat mentioned a short discussion that the committee had on projects and voting in regard to research on research. She shared that Janet would further the discussion.

Finances

Richard reported that CRE spending in 2014 was \$1,892,880. He said we were underspent but there were no projects that were executed for lack of funds. Richard encouraged the Council to generate good proposals to the spending in 2015.

Digital Committee

Brad Adgate spoke to the two ethnographic studies, the longitudinal and the acceleration.

Regarding the acceleration project, we are looking at how technology is being used after it has been in place for a period of time. Brad also pointed to five topic areas in the ethnography: group viewing, OTT services, Kids, mobile and advertising,

Brad cited the six scenarios of group viewing identified by GfK, distinguished largely by presence and attentiveness:

1. Peripheral viewing: Low attention, variable presence

2. Unintended exposure: low presence, variable attention
3. Incidental group viewing: attention and presence go hand in hand
4. Dedicated group viewing: high presence, high attention
5. Together, viewing separately: high attention to multiple content streams
6. In-the-moment viewing: short bursts of high attention, high presence

More details are available in the [Digital](#) section of the meeting deck (Page 25+)

Paul Donato mentioned that MRI gives relative sizes to such viewing segments and it would be worth a look.

Christine Pierce mentioned that this could be useful with defining cross platform exposure. Horst Stipp pointed out that audio cues impact attentiveness, which has implications for advertiser evaluation. There was wisdom back in the 1950's when Nielsen was encouraged to measure being in the room with the opportunity to view. Jeffrey Graham asked a final question about second screen as a complement to viewing. Brad said he would check with GfK and get back to him.

Big Data Committee

Stacey Schulman reported her committee had a meeting with Blue Kai. Meetings with MasterCard and Neustar have also been scheduled. They are also looking to have a meeting with eXelate in the future. The committee is driven by research questions focused on data quality.

Stacey also commented on the industry working together and shared that CIMM is doing some exploration in this area as well and has hired Gerard Broussard, who drafted the CRE Big Data Primer to do a whitepaper, which will be released in the spring. She commented that CIMM has been very helpful and that they have also assisted with the data company meetings.

Stacey also shared a possibility about working with data scientists. She is also contributing to the ANA Elevate blog and is working with the Broadcast Educators Association about Big Data.

Pat Liguori suggested that it would be helpful to differentiate between the work of data scientists and researchers. Stacey added that understanding the skill sets of the two would be important.

Return Path Measurement

Pat Liguori discussed three items with the Council. She requested the Council approve \$15,000 in funding to update the [One Touch Intelligence Report](#). Spending was approved. She then offered some possible future projects: Audience Measurement Fragmentation, Cloud as a Replacement for Set Top Box, Set Top Box Functionality, and Set Top Box Algorithms, particularly demographic and program genre of on/off behavior.

She then reported on her committee's discussion of what is missing from return path data including: over the air, over the top and out of home viewing; who is in front of the TV; non-set top box households; demographic modeling and other market and geographic issues.

Nancy Gallagher suggested it is important to know how set top box is viewed by the industry: holy grail? supplemental? Lynda expressed Nielsen's keen interest in census data sets recognizing their flaws and merging them with Nielsen panels. Stacey Schulman stressed the importance of the interface, whether the cloud or set top box.

ROI

In Dave Poltrack's absence, Richard shared that the ROI Committee would be holding a webinar on April 1, 2015 to share findings on the study performed by Sequent Partners.

CRE and Methodology, Janet Gallent

Richard Zackon had requested that Janet Gallent provide a brief refresher on scientific research principles. Janet shared the following: https://www.youtube.com/watch?v=7sSuhQ1_24 and discussed these items: identify your research question, design the research, choose your research methodology, sample frame, collect the data, analyze the data, report the data, and act on the data. She discussed validity, reliability, generalizability, and credibility. All of this applies to both quantitative and qualitative research.

Howard Shimmel and Horst Stipp agreed to work with Janet to help bring focus and rigor to our research.

Richard also reported out results on a quick quiz on research principles taken by Council members. The average was 5.9 out of ten which compares to 6.3 from Nielsen's Data Science people.

Local Measurement

Billy McDowell thanked the committee for its diligent work and turned to Richard to discuss the predictive modeling project. Richard noted that he had contracted with Vasant Dhar of NYU to use machine-learning techniques to predict TV ratings in local markets. The idea is that people meter data from outside a market can be a basis for ratings predictions inside a market. The first cut which Vasant and his team worked was tested in local people meter markets where there is a valid and somewhat reliable standard.

Unfortunately, Vasant was not present to review the findings; however, Paul Donato who had reviewed the findings stepped forth to report. Paul said, basically, he agreed with Vasant's approach and intends to get his team to work closely with Vasant's team. He took some issue with the approach to validating the accuracy of the predictions, but basically considered it good news to have the opportunity to work with an outside team. The task of Vasant's team was made more difficult by having no data inside the markets which were predicted. Richard noted that the predictions were done without the inclusion of TV programming data. Hadassa Gerber commented on the importance of program and genre data in Nielsen's viewer assignment model. Richard added that after this first modeling phase, we are now in the learning phase.

Billy mentioned the second project his committee is discussing with researchers from Temple University using a Bluetooth technology app. Jed Meyer asked where Nielsen stood with app measurement. Christine Pierce noted response rates and viewing levels were actually lower than the paper diary. Apps seem to work better for audio measurement. Paul discussed Nielsen's relationship with Digimarc.

Audio

Buzz Knight reported that the committee held its first meeting in January and has held four meetings total. He showed a fun image of him herding cats.

Buzz shared that as the audio landscape evolves the Audio Committee's goal is to investigate and measure the use of audio across platforms and to understand what audio's role is in the media mix. The committee seeks to learn the implications that this evolution has on current measurement techniques and the need for potential change or adjustment to the methodology, all in alignment with Nielsen's goals and strategies.

Buzz looks to hone the discussions and to come to the June meeting with a specific proposal.

Media Consumption and Engagement

Joe Abruzzo thanked Michele Buslik who has been a very important member of the committee. He also informed the Council that Doug Peiffer had joined the committee. Doug is from OzTAM in Australia.

Since the last meeting, Joe's committee has shared its findings with Nielsen clients, published its white paper, and held working sessions to determine a research agenda.

In progress are RFP's and a publishable matrix of cross platform metrics.

He also shared that the committee has established the following questions in regard to establishing a research agenda: definition of an exposure, an impression by media platform, direct support to cross-channel equivalency, impact of concurrent usage, impact of group viewing and impact of commercial load

Joe informed the Council of two RFP's that the committee is in the process of finalizing and plans to distribute within the next few weeks: Valuation of Cross-Platform Viewing and Concurrent Platform Usage

Lynda asked, is the focus on advertising campaign measurement or content measurement? Joe confirmed that the intention is to measure both content and advertising campaigns.

Howard Shimmel suggested a session between Joe's committee and the Nielsen Total Audience team. Lynda thought that was a good idea. Horst Stipp remarked it is important to look at program environments and commercials as a whole.

Social Media

Beth Rockwood reported that the committee had our academic webinar with Nielsen clients on March 4th and it was well attended. Mitch Lovett and Renana Peres did a great job reporting out how social media triggers TV viewing.

There is a new analysis underway comparing the national sample with mobile diary. Beth requested \$15,000 for the analysis, which had been temporarily covered, but not voted on by the Council. The expenditure was formally proposed and accepted by the full Council for \$15,000.

Richard noted that the ARF Audience Measurement conference would include the academic study of social media impact on viewing. The CRE assured the ARF that there would be new information presented at the conference.

Communications

Richard began by acknowledging Emily Vanides, the former chair of the Communications Committee who had begun a new job at Nielsen. Joanne Burns and the Council thanked Emily as well. Joanne Burns shared that she agreed to step into the role of leading the Communications Committee for the CRE.

Tom Campo shared that the Council has surpassed 700 members on its LinkedIn Group and is approaching 800 newsletter subscribers. The newsletter enjoys good readership by its subscribers as measured by the open rate.

Mark Braff reported that Kate Kaye, an analytics reporter from Ad Age had expressed an interest in a couple of CRE initiatives. The result was a very nice, lengthy piece that she wrote on the social media academic review. She will be invited to attend the Digital Ethnography webinar on April 28th and hopefully that will result in another story.

Stacey Schulman also mentioned that she wrote a byline piece, which will be running in the American Marketing Association's blog called Elevate. MediaPost has also committed to doing a five-to-six excerpt series on the Big Data Primer.

Joanne Burns reported that the re-programmed CRE website launched in February and that any feedback is appreciated. Richard and the Council acknowledge Joanne for the great work on the site. Joanne emphasized the availability and prominence of CRE research on the new site. She commented that the mobile version of the website just launched. She also acknowledged Shelley Drasal for all of her work on the website. Joanne closed with an invitation for members to become members of the Communication Committee.

Richard commented that he is in conversation with Pete Bradbury, with whom Lynda had placed him in contact, regarding getting the CRE studies into Nielsen 360.

Education

Jed Meyer spoke to three events that the committee has come up with for 2015. The first is The Power of Women in Research and Media. The goal is to improve

the representation of women with diverse backgrounds. Lynda Clarizio and others will be speaking.

Proposal number two is a presentation / overview of how research is used and applied to business questions to the 4A's MAIP (Multicultural Advertising Intern Program) summer interns, which we also did last year.

The third item is a young career event to expose people early in their career. Jed requested \$25,000 to fund the three events.

Joanne Burns asked if there was a possibility of having an event in Los Angeles. Jed offered to work with Joanne on that.

Jeffrey Graham noted the ARF has a young professionals program. Horst Stipp added that the ARF is looking to be more active on the west coast in their young professionals program.

The Council approved the funding request.

Jed requested that if anyone has summer internships they should be posted on the CRE website.

Insights to Practice

Nancy Gallagher expressed dissatisfaction with the Insights to Practice process. Richard Zackon said that we need to review the process. Janice Finkel-Greene asked what constitutes practice. Richard commented at the last meeting it was discussed that before a project is approved, the proposal is run by a small committee (led by Janet Gallent) to assess the methodological relevance, research design, and pricing. It would be like a Good Housekeeping seal of approval. Members of the Council are free to vote up or down regardless of the committee's point of voice.

New Business

Andy Rainey suggested that the CRE revisit the Video Consumer Mapping study, which like the original would fill critical knowledge gaps. She felt it was important to include audio in the work of the CRE. Perhaps the Council could review the study as to how it relates to current RFP's. Janet Gallent commented how much her company values the study. Horst suggested that perhaps a different methodology should be applied. Brad Adgate commented that PPM may be appropriate. Janet stepped up to consider a new VCM-like study. Horst agreed to work with Janet. It was proposed that a first step would be with Mike Bloxham. Paul Donato noted we should be mindful of changes in measurement capabilities since the VCM. Richard said that he would put out an invite to the Council to join this group.

Richard noted that there are as many as ten empty seats on the Council and requested that people suggest candidates.

Richard raised the question regarding whether programmatic is something the Council should be looking at. There was no strong interest expressed and Janice agreed to reconsider this area in June.

The meeting was adjourned at 4:32PM