



Minutes from Quarterly CRE Meeting
March 23, 2017
Convene Conference Center
101 Park Avenue at 41st
NY, NY 10178
Pershing Hub

Members in Attendance: Kathleen Bohan, Cheryl Brink, Tim Daly, Pete Doe, Paul Donato, Sara Erichson, Janet Gallent, Hadassa Gerber, Buzz Knight, Pat Liguori, Annette Malave, Billy McDowell, John McMorrow, Dave Poltrack, Debbie Reichig, Howard Shimmel, Robin Thomas

Present by Phone: Brad Adgate, Ann Casey, George Ivie, Stacey Schulman, Ceril Shagrin

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

Absent: Artie Bulgrin, Jon Cogan, Tanya Giles, Keenan Pendergrass

Opening

Billy McDowell opened the meeting at 1:02 by asking everyone to introduce themselves and asked them to share some predictions about the future.

Committee Reports

Audio

Buzz Knight reported making progress on the RTI project for Hybrid Measurement of Local Market Radio Listening. RTI has convened three focus groups with industry leaders and there has been great communication between RTI and Nielsen around PPM Diary Measurement.

Big Data

Stacey Schulman reported that the committee got its first glimpse at the findings regarding its target modeling project. It is a comparison of six different DSPs (Demand Side Platform). All provided better ROI than what the client (AIG) typically sees. The committee submitted the project to the ARF Audience Measurement Conference.

Data Quality

Pat Liguori reported on the status of the device bias study. The study looks at potential bias measuring television, computer and mobile from the same individuals. There is a 63% return rate on mailed questionnaires and the in-person data collection will continue through mid-July.

A proposal has been submitted to the ARF Audience Measurement Conference to report out partial results.

Local Measurement

The Local Measurement committee is still looking for its next project. Perhaps it will work with the Return Path Data committee. Perhaps it will work with the MC&E committee on Out of Home. The committee will discuss possibilities with Christine Pierce.

Media Consumption and Engagement

The MC&E committee conducted a supplemental analysis of concurrent platform usage among key demos. The 2015 data will be on the website. The committee met earlier in the month to begin planning its next major project.

Neurometrics

The committee is 95% complete with its neuro measurement project. Howard Shimmel reported that the in-home findings were presented at the ARF conference earlier in the week and there is a meeting scheduled for April 6th in Oldsmar to discuss with Nielsen. The people meter performed well in the study with fewer distractions than feared. A full presentation to the Nielsen client community will complete the study.

When asked by Tim Daly, Howard said that if portable people meters are to be considered, it would be as a future study.

Return Path Data

Cheryl Brink reported that her committee will initially focus on local market measurement of RPD because that is where Nielsen is currently focused. The committee will consider coverage in specific markets and viewer assignment modeling.

Pete Doe reminded Cheryl to complete the engagement form with Insights to Practice.

ROI

Dave Poltrack updated the Council on the TV inputs to Marketing Mix Modeling Project. After comparing precise minute versus quarter hour data, the study found that more precise measure did not significantly change the performance of the model. This represents potential savings because subscribers to the data do not need to pay for precision that is not useful. The study has been submitted to the ARF Audience Measurement Conference.

Richard acknowledged Howard for the suggestion of Research Updates in a Minute. It seems to have made the meeting more efficient.

Key Finding from Survey Results

Robin Thomas summarized the survey results which she has delivered the day before in a CRE webinar. The Key Findings were.

Strengths

- An organization like the CRE is considered important by over three-quarter of all respondents (75.3%).
 - Among those *AWARE* of the CRE this score rises to 85.8% and those *ENGAGED* is even higher (91.6%).
- While a large portion of clients (71.2%) understand the CRE's core mission is to "Conduct research of measurement methodology," there remains a significant number that are still unclear.
- "Value to Industry" (67.3%) and "Quality of Work" (65.4%) are the two highest rated attributes, while 71% of respondents agree that the CRE is a "Valuable Resource" to the media industry.
 - "Relevant" (69.5%) and "Thought Leaders" (65.0%) most accurately describe the CRE for clients. Only 1.5% of non-participants state "The work the CRE conducts is not relevant to me".

Areas for Improvement

- Awareness of the CRE among Nielsen Clients is less than half (48.9%), which is considerably lower than in the 2013 study and below 2010.
 - Awareness was substantially stronger among the National TV sector (74.7%), but lowest among the newly added Radio/Audio group (30.5%).
- Only 38.7% of respondents believe the CRE does a good job communicating with clients, and even fewer (18.5%) know how to communicate ideas to the CRE.
- Non-Participation is due to lack of knowledge about the CRE as 63.7% of those who haven't participated state "I don't know enough about the CRE" and 44.9% say "I'm not sure how to join the CRE".
- The understanding that the CRE functions independently from Nielsen is low (43.3%). Additionally, over half (52.4%) feel it's the core mission of the CRE to "Identify and solve problems with the Nielsen service," 43.1% believe the CRE "Audits the work of Nielsen" and 31.3% think the CRE "Approves products in development at Nielsen".

Opportunities

- Over three-quarter of clients (75.2%) think the CRE should provide research training to Nielsen clients and an equally strong number (70.6%) feel the CRE should be involved in mentoring young people interested in media research.
- The majority of clients say that measurement of digital, mobile and cross-platform initiatives are most important.
 - "Mobile and the impact of digital technology on media use" (87.7%), "Improving measurement of digital audience behavior" (87.3%) and "Aligning impressions across platforms for total campaign measurement" (83.1%).
- The two lowest scoring descriptors of the CRE were "Inclusive" (35.4%) and "Diverse" (31.7%). We have an opportunity to improve in this area by bringing in more diverse members to the council and committees.

- Sample size, viewer assignment and measurement methodology were all frequently mentioned topics clients would like to see the CRE address.

Charter

Richard Zackon began by saying it is good for an organization to reconsider its mission and its performance from time to time. Following the December 2016 meeting we set aside most of today's meeting to this. The topics include: Charter, Membership, NDA, Committees (Steering, Insights to Practice, Communication, Research), Digital, Diversity, Education, Nielsen Participation, Other: Technical Advisory, How can Shelley help us even more? and Other.

Richard read from the Council's original 2005 charter: "The mission of the Council for Research Excellence is to advance the knowledge and practice of methodological research on audience measurement through the active collaboration of the Nielsen Company and its clients." Richard asked if we are acting consistent with our mission and might we want to tweak that mission. Paul Donato noted that when the CRE was created Nielsen would probably be the only beneficiary of its work and this is no longer the case. Buzz Knight suggested the word innovation appear somewhere in the Charter. Hadassa Gerber pointed out that the mission doesn't say "to advance the knowledge of Nielsen", it is general. Paul responded by saying that what he meant is that is that we are now in a different competitive market. Hadassa said the benefit currently is mostly for Nielsen but the work can also serve the industry. Sara Erichson said the goal of helping Nielsen and helping the industry is not inconsistent. Still, Nielsen is not interested in funding an organization that identifies methodological improvements for its competitors. Paul said to date Nielsen has handled these questions on a case by case basis. Pat Liguori stated that in the past the Council seemed to function more independently of Nielsen and she acknowledged that we are in a different competitive environment. She felt we need to be specific about what we want to do before narrowing the mission to Nielsen primarily. Paul summarized by saying there needs to be a mechanism that Nielsen has some control over releasing research that clearly benefits competitors. George Ivie weighed in to say the key part of our charge going forward is to study media, consumer behavior and methodology to help Nielsen adjust its methodologies and test new things before they implement them. Howard suggested that maybe clients could self-fund for greater independence. Pete argued that if insights from CRE are shared broadly with the industry, it would raise the level of measurement and make Nielsen even more competitive. {An unidentified voice} raised a concern that we might lower the level of member participation if we only focus on Nielsen. Debbie Reichig commented that to date Nielsen has been generous in funding research that isn't specifically actionable. It is this broad focus that keeps her involved. Sara suggested that at the beginning of each study that CRE have a conversation with Nielsen about what ought to be proprietary to Nielsen and its clients. Horst Stipp pointed out that over the years Nielsen's focus has tended to broaden. Pete Doe suggested that perhaps the charter needs an item with a scope of what's in and what's out. Hadassa noted that things change very quickly and the way we have been handling things has worked.

Membership

Richard said we currently have 22 members and our bylaws allow for 40. Changes in employment status has taken its toll on our membership. Perhaps expanding membership should be a Steering Committee issue. Sara suggested we might reconsider the limitation on the number of members per company. Paul noted that Nielsen initially tried to allocate membership according to the size of various industry groups. Pete offered that whatever committee looks at membership, a formula for membership would be a first task. Pat Liguori

said that if we have more than one person per company that they should come from different business units. Hadassa suggested that Council membership be open to people who are users of research as well as heavy duty researchers. The membership roster should include a diversity of companies. Paul expressed concern about too large of a group. We should be mindful of the size of the room and the group. Paul advised caution getting some of the large digital players to collaborate. Pat encouraged the Council to keep its no substitution policy as it ensures continuity. Tim Daly suggested that the Steering Committee is in a position to handle membership. Stacey said that her committee would be willing to do that. It was suggested that we bring in millennials to fill some of the empty seats. Richard responded that committees are a more appropriate place to groom future members.

NDA

Richard informed the Council that Nielsen Attorney, George Franciscovich, had agreed to attend a Steering Committee Meeting to discuss NDA's. Hadassa noted that not all Nielsen clients on the CRE are under the same NDA's which can inhibit discussions. Some are under stricter NDA's than others. Sara advocated simplicity regarding NDAs and reminded that the request is not coming from Nielsen but from the clients. The subject will be discussed at the next Steering Committee.

Other Committees

Steering Committee

Stacey believes the Steering Committee gets through issues and gets to conclusions well. Sara said Nielsen tries to tread lightly on Steering and the process goes well.

Insights to Practice

Pete spoke to his nine-month effort to bring process and measurement to the work of Insights to Practice. He acknowledged Eric Solomon and Christine Pierce for their participation. It is good to have both Data Science and Product Leadership as part of Insights to Practice. Eric is eager for the committee to go through its new process from start to finish. Christine reminded the Council the process of getting Nielsen involved early in a project.

Communications

Ann Casey reported that Robin Thomas, having completed the client survey, had agreed to be the Vice Chair. Ann thanked Mark and her committee members for their good work.

Buzz Knight asked whether the committee will develop a series of actions from the survey and Ann said yes. Pete suggested CRE's use of Linked In.

Digital

Cheryl Brink noted that with Facebook and YouTube, Digital metrics are growing more complex and a Digital committee could partner with Nielsen to identify priorities. Debbie Reichig asked whether Nielsen could suggest specific projects as they relate to Digital. John McMorrow suggested an active Digital committee would be a good way to lure experts to the CRE. Horst said that it is important to have a formal process to identify issues and it would be good to have Nielsen weigh in on it. Dave Poltrack offered that digital is irrelevant now because everything is digital. He suggested three buckets: social, search and video. Eric suggested perhaps

researching addressable versus digital. He sees the role of CRE as executing research versus providing advice to product development. Tim Daly asked whether Nielsen was doing any methodological research that the CRE does not know about. Eric responded by saying that there are some early stage projects that Nielsen has not brought to CRE; for present and short term methodology Nielsen focuses on the MRC. For future methodology, it is more focused on CRE. Christine Pierce said in recent years Nielsen more and more is oriented to the CRE when considering methodology. Brad Adgate agreed to lead a discussion on addressability [Note: In April, Brad informed CRE that he will no longer be at Comcast].

Diversity

Regarding diversity, Richard noted that Nielsen Clients found it the least fitting descriptor of the CRE. While the CRE is gender diverse it is not age or ethnically diverse. Horst Stipp mentioned ARF Young Pros Group. Howard suggested maybe inviting a group of 12-20 millennials to a future meeting. Richard proposed that we might ask member companies to recommend a couple of candidates and if we put a group together maybe give them a project to do. Brad suggested looking to partner with the 4As. Dave Poltrack suggested involvement with Nielsen's HR people. Sara suggested that if we put a group of people together it ought to be diverse not just minority. Eric Solomon notes that Nielsen has had success internally working with young people on studies. Robin said that the client survey also noted that lack of inclusiveness is also an issue for CRE so the presence of this group at meetings might be helpful. Richard asked if anyone would be willing to step up to lead a new effort. Annette Malave said that she would consider it. Richard thanked her and said he would follow up. Billy liked the idea of having CRE members each propose a couple of names from their companies.

Education

Richard said in the 2010 survey, 55% of clients said CRE should provide research training to Nielsen clients. That went up to 65% in 2013 and 75% in 2016. This appears to be a reliable trend. Richard had spoken to Billy and plans to propose an educational program at the June meeting. The program would be online, asynchronous and modular. It would include a media math primer, review of standard methods of audience measurement, making sense of cross platform data, how we can trust the data we have, visualizing and telling stories with data, extracting insights and other topics. Pat Liguori suggested looking at the difference between data science and research. Hadassa Gerber suggested comparison of metrics between digital and TV. She also suggested the possibility of an accreditation degree. Janet thought YouTube videos would be useful. Pete Doe suggested adding R and Python. Richard said his thinking was to start out small and build up. Janet Gallent, Pete Doe, Buzz Knight, and Annette Malave all volunteered to participate. Richard will call a meeting of the education committee before the next quarterly meeting.

Nielsen Participation

Christine commented that she spends a fair amount of time with CRE and it is time very well spent. It is a unique opportunity to engage with clients focused on methodological research. Pat feels that the team of Sara Erichson and Christine Pierce has been very positive. Howard Shimmel added his appreciation.

Technical Advisory

Richard noted that the CRE bylaws call for a technical advisory committee of three or four academics to provide consultation on issues of measurement. The committee has not been active in recent years. He asked the Council for its point of view. Christine thought it was a good thing to do and the challenge is finding the right academics. Howard thought it might be useful to include schools with media research programs. Eric Solomon thought universities might be cost saving resources to execute research. Cheryl said Scripps has used academics to do some interesting analyses. Tim cautioned against working with diploma mills. Dave cautioned that we be mindful of working with adjuncts that do commercial consulting and we should tread carefully. Pete said that the academic need to publish might be an issue. Robin added that she has relationships at the University of Georgia and USC.

How can Shelley Help?

Richard asked CRE members if they saw additional ways that Shelley can help with committee efforts. Christine said that she cannot imagine the CRE without Shelley and asked whether Shelley might suggest ways which we can incorporate video into our efforts.

Steering Committee

Stacey reported that the Steering committee met in January and discussed several issues coming out of the December Quarterly meeting. One of the issues was third party processors as CRE members. It was decided that clients from these organizations could be committee members but not council members. A second issue was non-disclosure agreements. Stacey said that at the next Steering meeting, we would have someone from Nielsen Legal join us to discuss. The third item was Richard's compensation. The last time his compensation was reviewed, he was given a 4% increase given increased responsibilities. Billy acknowledged him for his extraordinary work and unique set of skills. The fourth item on Stacey's list was an application for membership from Dan MacDonald of the NAB. The Steering Committee has recommended him for membership. The Council voted to admit Dan. The fifth item concerns Nielsen's funding of CRE for 2017. Sara said that Nielsen has requested a one-time lowering of the budget to \$1.5 million for 2017. The rationale is that 2017 is an extremely investment heavy year for Nielsen. Richard noted that the timing makes this acceptable because there are not a lot of competing projects for 2017. The Nielsen investment of \$1.5 million breaks out to \$1 million for projects and the remainder for administrative.

Nielsen R&D

Christine provided an update on Nielsen research priorities for 2017. Local Measurement is a huge priority and includes, radio, audio and Scarborough. Two of the initiatives here are Return Path Data and Portable People Meter. Portable Peter Meter will be expanding 10% across all markets and Scarborough is expanding to 210 DMAs.

Regarding total audience, Nielsen will be using the streaming meter to understand over-the-top viewing. Timing of implementation is dependent upon impact data. Focus is also on digital audio, audio big data and mobile enhancements. Other innovations actively considered include the Nano meter, Wearable meters, Algorithm outlier/detection/flags and Location data. Janet suggested that her committee might work with Nielsen concerning wearable meters. Buzz Knight asked about a road map for the SDK implementation. Sara offered to speak offline about this and suggested this might be an education opportunity for the industry. Hadassa asked

whether Nielsen has considered the possibility of button pushing capabilities in code reader markets and Nielsen said it is on the horizon but not on the road map.

Christine briefly discussed some additional CRE and Nielsen research opportunities. These included out of home media consumption, small market sampling/modeling, electronic vs self-reported data, kids and teen measurement, Big Data validation techniques, demographic data gaps and skews and mobile and location data sources.

Communications

Ann Casey thanked Robin for her work on the client survey and for agreeing to be Vice Chair of Communications. She went on to say the committee recognizes the need to increase awareness of the CRE. A mailing went out to Nielsen clients in January to expand the list of our newsletter but we got little response. She added that CRE branding remains an issue. Mark Braff noted that only about 25% of our newsletters are opened by those who opted to receive it. Mark suggested that we include in the subject line something more attractive than simply "CRE Newsletter". Sara Erichson expressed Nielsen's reluctance to verify the newsletter list against their client list. Hadassa said there are some missed opportunities in promoting CRE's Newsletter's in CRE mailing and at Nielsen events. Nielsen offered to include a flier at their upcoming National meeting. Janet Gallent spoke about the valuable information on the website and encourage people to visit. Ann said that she is working on the website. Pete Doe asked about a Facebook page or a Linked In page and Eric suggested Snapchat for millennials.

Insights to Practice

Pete Doe reported progress on accessing impact on the outcome of the twelve most recent projects, seven of which included methodological enhancements. Pete also harkened back to Dave Poltrack's suggestion to revisit some of the previous work of the CRE and the committee will look to the VCM study conducted in 2008.

CRE Finances

Richard reported that we have spent \$225,000 to date and that we need to remain aware of the decreased budget for 2017. He said he would review with Nielsen finance spending in 2017 he feels belongs in 2016. One member expressed the concern that sometimes when a budget is decreased it is hard to restore in the following year. Sara said that has not been Nielsen's history with CRE and Richard agreed.

Futures Event

Tim Daly reported the Futures Committee is looking to create an event in the early Fall with Industry Leaders to help guide the CRE research agenda. Earlier in the day, the Futures Committee discussed a possibility of a survey to help pave ground for the event and identify the three key areas: content distribution, add monetization and consumer behavior. Richard offered that the event would be a good opportunity to introduce the CRE to possible members. Tim thanked the team that met in the morning.

Elections

Richard reminded the Council that its bylaws call for a secretary and in the past the Communications Chair has filled that role. Ann Casey agreed to become secretary of the Council. Hadassa formally nominated Ann and the Council unanimously approved Ann as its

secretary. Richard also noted that with the departure of Tanya Giles there is an empty seat on the Steering Committee. Debbie Reichig agreed to fill the seat. The nomination was moved and seconded and approved without opposition. Stacey Schulman welcomed her to the Steering Committee.

New Business

There was no new business.

Adjourn

The meeting was adjourned at 4:20 PM