

EXPANDING TV'S MEASUREMENT MONOPOLY:
NIELSEN'S INCLUSION OF NEW MEDIA SUBFIELDS

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ABSTRACT

Digital media provide multiple measures to quantify television audiences. Newer measures challenge Nielsen Ratings' established status as the market information regime on which audiences are commoditized. Although, such changes have reconstituted the field, few studies on audience measurement have holistically identified factors driving this development. Adopting an institutional lens, I advocate that both endogenous and exogenous "functional pressures" contribute to such changes. For television these are: a) the imperfect but accepted nature of television ratings (endogenous) and b) the shift in user preference to increasingly consume media online (exogenous). Assuming these changes impact Nielsen significantly, I historically analyze The Nielsen Company's response(s) to the rise of newer information regimes between 2006 and 2015. My data source is the media and advertising trade press (*Broadcasting & Cable, Advertising Age, Gigaom* and *TechCrunch*). I find that Nielsen is able to once again monopolize audience measurement in the redefined field by identifying the developing niches of market information therein and the players occupying these new informational subfields.

Keywords: Nielsen, audience measurement, market information regimes, new media, institutional development, television

Chapter 1: Introduction

In the infancy of the 21st century, where instant connectivity and mobile capabilities rule the media landscape, media scholars are beset by questions of how new and traditional media will interact and progress. At the center of these abstract questions lies the crucial importance of audience measurement. This, simply put, is because of the relationship between audience size and advertising dollars; the greater the audience, the more money media content providers can leverage from advertisers. Hence those players that tally or measure the audience have long since secured their role in the transaction between media content provider and advertiser. This particular relationship is more or less the same regardless of media format and demonstrates the pivotal role of audience measurement. Audience measurement thus functions as a market information regime, which is defined as a socially constructed system in which marketplace participants *perceive* and *assess* their performance and the performance of their competitors (Anand and Peterson, 2000). These regimes “facilitate continuity in ongoing fields by providing a focus of attention around which participants can cohere” (Anand and Peterson, 2000, p. 281). In that sense, institutional fields are constituted around market information regimes.

Nielsen ratings have functioned as that regime for the broadcast media industry almost since the advent of commercial radio. The purpose of my research is to trace changes in the field of television via the changes in audience measurement during the infancy and rise of digital media. I argue that, as the dominant television ratings regime, Nielsen will be at the forefront of recognizing and responding to changes in audience

measurement and thus the field of television at large, as they have the most to lose if they fail to comprehend these developments.

More specifically, I conduct a historical institutional analysis of Nielsen's response(s), as the premiere broadcast ratings regime, to the rise of new media information regimes. Analyzing Nielsen's series of responses, or lack thereof, to the emergence of these new media information regimes in a historical institutional analysis denotes changes in the field of television that coalesces around ratings as the market information regime. In analyzing Nielsen's responses to new media information regimes, media scholars can begin to identify factors facilitating change in television audience measurement. Identifying these factors in turn unravels the consequences of these changes in the field of television. The research presented is intended to serve as an initial step in understanding the dynamics of broadcast media oriented-institutional change in the new media environment.

Chapter 2: Literature Review

To address the changes currently transpiring in television audience measurement, I synthesized theoretical literature from two fields of study: theories of institutional and organizational change and studies on changes in audience measurement from communication studies. I draw on institutional and organizational theory, attributing institutional change in television to both endogenous and exogenous “functional pressures”. These pressures for television are: a) the imperfect but accepted nature of television ratings (endogenous) and b) the shift in user preference to increasingly consume media online (exogenous). I also draw on past literature in audience measurement to explain how these functional pressures have facilitated the rise of new media (online) information regimes, and what their existence means for established ratings regimes (Nielsen specifically). Doing so allows one to gauge and trace the change occurring in television audience measurement and the field of television.

Television Ratings as Market Information

For decades, advertisers and content providers have both relied on third party measurement firms, namely Nielsen, to produce “institutionally effective” audience ratings, a term introduced by Ettema and Whitney (1994) to describe ratings systems as an ‘imperfect yet acceptable’ form of exchangeable equity in the fields of media, marketing, and advertising. But in the digital space, these Nielsen ratings are proving far less ‘acceptable’ for advertisers and media content providers alike. With an increasing number of audience members seeking out and consuming television programs in the digital space, traditional Nielsen ratings, produced by outdated measurement methods,

prove to be increasingly unrepresentative of the audience. Parallel to this, new media players such as Google, Twitter, Netflix, and Facebook are gaining legitimacy and popularity in their role as online information regimes with their vast stores of user data. As new sources of market information become available, new niches within an industry field can form, where “variations in categories of information within a regime can be used to create differentiation within a mature organizational field” (Anand and Peterson, 2000, p.282). The data from new media information regimes, such as Google, Netflix and social media, are catalyzing differentiation within the television ratings industry by supplying the market players (the advertisers and content providers) with new kinds of market information about their audiences. This phenomenon is an example of institutional change caused by “functional pressures” (Scott 2014). Therefore the differentiation within television ratings needs to be analyzed as such, and to that effect studies of institutional change offer some insights.

In their analysis of institutional change in the U.S. Radio Broadcasting industry, Leblebici et al. explain,

The cycles of transformation in the conventions, organization, and institutionalized practices in broadcasting show that institutional change is the product of endogenous forces that are associated with the historical evolution of the field itself (Leblebici, Salancik, Copay and King, 1991, p.360).

To identify these “endogenous forces” affecting change within the television ratings industry, attention must be given to the market information and the information regimes that constitute the field formation of audience ratings in the analogue *and* digital spaces.

By tapping into new fields of market information (the unending supply of user data, provided by online information regimes), players in the television ratings industry can begin to make sense of the audience measurement trends emerging in the digital space, given their relative unfamiliarity with these new information regimes when compared to their familiarity with Nielsen ratings.

Leblebici (1991) notes, “Because the creation and change of institutions are expensive, they require high levels of interest and resources. Only institutional entrepreneurs, who are organized and possess sufficient resources, are capable of introducing institutional change” (p.336), and Nielsen perfectly fits that mold. But the time for *introducing* change in the television rating industry has long since passed, and audience measurement scholars and professionals now realize they are wading through the vast stores of digital user data, attempting to forecast the effects of these new field formations and predict the behavior of audiences online. Nielsen in particular is attempting to rationalize the effects of this change because of their market leader position in the television ratings industry. As the premiere television ratings regime, they have the most to lose if they fail to respond effectively to the emerging informational fields in the digital space.

Returning to the relevance of these “functional pressures” (Scott, 2014), institutional change is arbitrated by “new conventions, based on different premises relevant for the fringe players who introduced them, transform the pattern of transactions among participants and thus alter definitions of success and its critical resources” (Leblebici, 1991, p.359). Google, Netflix, and social media sites, in the beginning, were these transformative ‘fringe players’ but no longer:

Fringe players were instrumental in generating new practices; subsequent adoption and legitimation of their innovations by established players produced new patterns of transaction; and these new organizations of the field transformed the new conventions into institutionalized practices by eroding the relevance of the previously core resources (Leblebici et al., 1991, p.359).

But this fact raises a larger question: will the institutional field level structure of the television ratings industry change with the inclusion the new market information supplied by these ‘once fringe players’? I argue yes, absolutely.

Developments in audience measurement can already be observed, such as Nielsen's partnerships with Netflix and Twitter. Will these partnerships prove mutually beneficial for new and old audience ratings regimes, or will either player attempt to press an advantage, seeking new audiences, subscribers, followers, users, etc., within the developing niches in the growing digital space? It obviously would behoove Nielsen to prevent the total erosion of its core resources, and thus survival strategies, incorporating these new media information regimes (and their data), have already been implemented. “We really will have a full set of capabilities in the market to measure what we call the total audience across all screens, devices and platforms,” said Mitch Barnes, Chief Executive Officer for Nielsen in a March 2015 interview with Bloomberg Business.

While Leblebici’s study pertained to the institutional changes that occurred within the U.S. Radio Broadcasting industry, his findings are blatantly applicable in the context of television ratings in the new media environment. This coherence around the fields of new market information supplied by these new media information regimes is an example

of ‘once fringe players’ legitimizing change in the way audiences are measured, thus substantiating and legitimizing the changes in the field of television.

Functional Pressures

Speaking rather broadly, institutional development and change are facilitated by various exogenous and endogenous pressures. These “functional pressures” are defined as forces “that arise from perceived problems in performance levels associated with institutionalized practices” (Scott, 2014, p.167). The “problems” in this case being the contemporary challenges in television audience measurement. In the case of the television industry, content providers, advertisers, and measurement firms would perceive these problems in measurement. Yet all these players operate in flux and hence their perceptions about measurement too keep shifting. At any given time, “many players in the process will adopt whatever model suits their purpose at the moment” (Webster and Phalen, 1994, p.33). Given this flux, one can identify a variety of functional pressures, when doing so for television audience measurement.

An easily observable endogenous pressure in the field of television is the nature of audience ratings. "All audience surveys, no matter how costly, limit to some degree the scope and detail of measurement of media content, audience response, and audience characteristics measurement" (Miller, 1994, p.59). Being multifaceted and limited by market factors in broadcast media, the ‘imperfect yet accepted audience’ represents the *best working model* in which billions of dollars are exchanged between content providers and advertisers, until now. Critical to the formation of these various ‘pictures’ of audiences are the measurement methods themselves. This inherent endogenous pressure is not just unique to broadcast audiences but remains present in all audience

measurement. This ‘imperfect yet accepted model’ of the audience is a vivid example of Scott’s (2014) “perceived problems in performance levels associated with institutional practices” or “functional pressures” (p.167).

Although traditional television remains popular, the television industry has long been mindful of audiences migrating to the web (Taneja and Young, 2014). I believe this trend constitutes a second functional pressure for the television industry, a pressure due to deinstitutionalization processes that can “arise from changing consumer preferences” (Scott, 2014, p.167). This exogenous pressure is far more evident today, but began with the growing popularity of cable networks compared to the three initial broadcast stations (as seen by the increasing production value of cable network content) (Wildman, 1994, p.117) when Nielsen improved measurement technology to measure individual television viewing from its earlier practice of measuring households (Barnes and Thompson, 1994). This trend has led to the theory that media specialization creates pressure within the field for more specialized measurement as "smaller, more homogeneous audiences offer advertisers more value per person, than larger, more heterogeneous audiences"(Barnes and Thomson, 1994, pp. 91, 92).

These two functional pressures of deinstitutionalization (the ‘imperfect but accepted model’ of the audience and the migration of the audience to the digital space) are not independent of one another. Simply put, the inability of audience measurement firms to precisely measure audiences has resulted in numerous technological innovations within audience measurement methods (shifts in preference). A review of these numerous innovations is not within the scope of this paper (see Barnes and Thomson, 1988, 1994; Napoli, 2011; Taneja, 2013). The broader point is that these two functional pressures still

exist in the developing digital space, and have resulted in the rise of new media information regimes (which attempt to combat the continued existence of these functional pressures).

New Media Information Regimes

With the popularization of the Internet, television audience measurement companies (such as Nielsen) have looked to measure online audiences. This effort has not been without its failures however, for “the online rating industry has not been able to achieve the level of stability reached in the broadcasting ratings industry through the creation of a standard and widely accepted measuring operation” (Bermejo, 2009, p.143). More specifically, this lack of stability is the result of a self-perpetuating cycle. The shift from broadcast to online

...has generated a process of audience fragmentation that is difficult to account for, especially when measurement relies on the use of samples...In response to these developments, commercial interests have intensified their push to gather information on audiences and consumers. The result is an ever-growing tension between the elusiveness of the audience and the eagerness of audience producers to measure it.

(Bermejo, 2009, p.141).

As Bermejo (2007) observed earlier during the development and launch of new media information regimes, “the study of audience measurement becomes a study of the media as institutions and of the role that measurement plays in the economic and social functioning of those institutions” (p.21). As I mentioned above, these institutional fields in which ratings reside and the roles of various organizational players within the field of

audience measurement are unquestionably changing. This “intensified push to gather information” has facilitated the rise of new media information regimes, such as Google, through their use of automated algorithms for collecting marketing information on, collectively, the audience, and individually, the user.

Currently, there is a lack of generally accepted theoretical context pertaining to the position and function of automated algorithms in media. Napoli (2014) suggests grounding certain aspects of algorithmic media production and consumption in an analytical framework of institutional media theory, where “an institutional analytical frame is appropriate/ valuable in those increasingly common instances in which algorithms are serving capacities that intersect with those of traditional media institutions” (p. 353). From the perspective of the audience (now labeled users), not the audience measurement industry, Napoli (2011) explains a cross-platform phenomenon, which he labels “audience evolution”. Briefly, the development and use of new media technologies (automated algorithms and search recommendation systems) that undermine existing industry supported models (Nielsen ratings), when coupled with the availability of new audience information or web analytics, is driving this process of audience evolution (Napoli, 2011, p.14).

This process of audience evolution parallels the two functional pressures of deinstitutionalization currently transpiring within the television ratings industry. Most importantly, however, is acknowledging that these two conditions, the “improvements in the available analytic tools *and* technological change that undermined the status quo, were necessary for the process of media evolution” and transitively, the process of audience evolution, to transpire (Napoli, 2011, p.28). The complementary nature of

audience evolution and these two functional pressures is no coincidence. In fact, their overlap suggests that media scholars are only now beginning to orient themselves within the unmapped terrain of the new media environment. In this new media environment however, there is a particular emphasis on audience measurement, where

...ratings analysis may be more usefully defined as the analysis of the data...used by media industry stakeholders to assess performance and success in the audience marketplace. Such a definitional approach imbues the field with the flexibility necessary to adapt to various stages of audience evolution (Napoli, 2011, p.171).

Unlike traditional broadcast audiences, “Google vertically integrates the search engine, the advertising agency, and the rating system,” (Lee, 2011,p. 434). As an in-house monopoly, Google alters the audience via the audience as commodity model by creating an artificial and completely controlled media market, in which Google is able to commoditize the keywords, ratings, and search results, all of which constitute the created market (Lee. 2011. pp. 439, 442, 443). Such interpretations argue for the relevance of new media information regimes as a major driving factor in the shifting dynamics of audience measurement within the new media environment.

Google is of exponential interest in this context of change because it achieves this in-house, vertically integrated monopoly over online audiences with automated algorithms. These algorithms facilitate personalized/segmented content production, distribution, and consumption of new media. With new media regimes like Google already employing optimized web analytics and audience measurement tools, new fields of market information are emerging. “The nature of ‘ratings’ is changing – or more

accurately, expanding; and the nature of the questions that can be investigated by ratings analysis can expand accordingly” (Napoli, 2011, p.171). While the nature of audience measurement (specifically television ratings) is expanding, it would be more than ignorant to assume these new media information fields are free to develop without the influence of pre-existing audience measurement regimes currently operating within the new media environment. The ultimate goals of web audience measurement are to further standardize and rationalize existing standards that substantiated web audience measurement in the first place: the facilitation of advertising planning (Bermejo, 2007, p.227).

Akin to Google and all of the other budding online information regimes, social media are producing their own market information, and thus play a unique role in the development and change of audience measurement, television ratings specifically. Whether intended to or not, social media are affording more power to audience measurement and marketing objectives,

Compared with more traditional media, they all offer some measure of interactivity, allowing users to click through, vote, sort, retrieve, recommend, post, buy, comment, or collaborate...Because social media are constantly adapting their functions, the boundaries between them are constantly shifting and often unclear (Webster, 2010, p.595).

This constant adaptation of social media functions coincides with Scott’s exogenous “functional pressure” of audience preference. Examples of social media functioning as new media information regimes include many of the recommendation algorithms employed by Facebook, Netflix, Twitter, and Instagram to better connect and feed their

users a more individualized and relevant stream of status updates, tweets, and posts. As social media scholars point out however, these automated recommendation systems and algorithms like Facebook's EdgeRank program

occupy a particular epistemological position where some components are known while other are necessarily obscured...They are also fluid, adaptable and mutable. This means that EdgeRank is not something that merely acts upon users from above, but rather that power arises from its interrelationships with users (Bucher, 2012, p.1172).

There in sum, I argue, lies the broader role of new media information regimes in audience measurement. While the television ratings industry is in a state of change, the dynamics of the field information that constitute the need for ratings, too, is changing. More user information is instantly available to any player in the digital space through various web analytic reports and backdoor marketing metrics. The greater take away is "the algorithm is playing an increasingly important sociotechnical role in mediating between journalists, audiences, newsrooms and media products, and that this mediation has both sociological and normative implications" (Anderson, 2011, p.530). Yet as the literature reviewed in this document suggests, with the migration of audiences online, players such as Google and Facebook have already nestled into the role of online market information regimes in the marketplace for audiences (users). This role is enabled and reinforced by the data collection capabilities (automated algorithms) of the new media information regimes that permeate the digital landscape, where

the constitution of field is information regimes-dependent, because reframing the scope, methodology, or tone of market information regime

creates a cognate change in participants understanding of the field itself
(Anand and Peterson, 2000, p.281).

This accelerated shift online, and consequently the rise of these new media information regimes, is problematic for existing broadcast audience ratings regimes. These algorithms are, in essence, enabling new players to supply the television industry with new subfields of information. This, in turn, can “spur the formation of new niches within a field” (Anand and Peterson, 2000, p. 282) of audience measurement. Nielsen fully acknowledges the emergence of these new niches, for the television “industry structure is constituted by coalitions of producers creating small, defensible niches for themselves within the broad spectrum of a product market (White 1981)” (Anand and Peterson, 2000, p. 282). As the audience measurement industry leader, Nielsen is maneuvering itself into an influential position, in an attempt to determine who specifically will occupy these emerging niches and where their allegiances lie. Furthermore, Nielsen will work to ensure the occupants of these emerging niches complement its own ratings monopoly, or at the very least, have them function in tandem. Therein lies the importance of analyzing the established audience measurement player’s response(s) to these institutional developments or more specifically, the emergence of new market information regimes. Thus, the remaining focus of this paper will concentrate on the audience ratings industry leader, Nielsen, specifically within the context of the following research questions:

Q1) As the established audience measurement industry leader, how is Nielsen specifically responding to the rise of online market information regimes?

Q2) What strategies is Nielsen employing to maintain its market leader position within the changing field of audience measurement and what are the consequences of these strategies?

Chapter 3: Method

Data Source

In order to answer my aforementioned research questions about the television ratings industry, I conducted a historical institutional analysis of Nielsen's response(s) to changes in the field of audience measurement via industry trade press. In using historical institutional analysis, researchers are able to tackle the questions pertaining to "how" and "why" certain events, phenomena and even change take place within and between organizations and institutions. For traditional television, I examined articles from *Broadcasting & Cable*, a long entrenched television industry publication, which emphasizes updates and trends within Nielsen ratings and the status of television programming. This source was selected for its time-honored relationship with the broadcast television industry. For the new media environment, I examined articles from *Gigaom.com* and *TechCrunch.com*, two online media sources that cover digital media culture, social media and technological developments and trends. These two sources were selected to encapsulate the voice and attitudes of the growing tech hub subculture gaining traction in the new media environment. Last, I included articles from *Advertising Age*, a long established and reliable source for trends occurring in media advertising planning, touching both traditional and new media platforms. This publication was selected to act as a more neutral source, mediating between the traditional tone of *B&C* and the new media tones of *Gigaom* and *TechCrunch*.

To obtain reliable evidence of institutional change within the television ratings industry, I conducted a historical institutional analysis of Nielsen in both the traditional

television industry and the new media ecosystem from January 2006 through August 2015. This time period denotes substantial growth in the availability and use of new media technologies to view television programming and, coincidentally, measure audiences. To compile these trade publication data sets, I used two query methods: I conducted *Factiva* database searches using the terms “Nielsen” and “measurement” for *B&C* and *Advertising Age*. After eliminating duplicate articles that also appeared when conducting identical search queries with the additional terms “acquisitions”, “multiplatform”, “cross-platform” and “total”, I analyzed 84 articles from *Broadcasting & Cable*, and 40 articles from *Advertising Age*. Additionally, “inurl:” Google searches were conducted, using the same terms for *Gigaom.com* and *TechCrunch.com*. After eliminating duplicate articles that also appeared after conducting identical “inurl:” search queries with the additional terms “acquisitions”, “multiplatform”, “cross-platform” and “total”, I analyzed 28 articles from *Gigaom.com* and 21 articles from *TechCrunch.com*. From these total 173 articles analyzed, 119 were included and synthesized, and 54 were excluded due to irrelevancy. The search terms “Nielsen” and “measurement” proved to be sufficient parameters for my historical institutional analysis, given the research focus was on the market information regime *leader* and its responses to the emergence of new media information regimes.

Analysis Method

My analysis focused on examining Nielsen’s response(s) to developments in digital audience measurement over time, more specifically within the brief yet critical history of the new media environment. This recent period features the development and

launch of numerous new media information regimes and the responses of existing ratings regimes, where

Tracing institutional developments through time allows researchers to account for potentially important issues including changes in the social environment that might affect actor's interests or the fit of an institution with a given environment. Unanticipated consequences of previous decisions or actions may only play out over time.... institutional change often results from learning and adaptation to external pressures (Fountain, 2011, p.9).

Pierson (2004) too, in his research of historical institutional analysis, argues for focus on the long-term processes of institutions and organizations, which he labels as "institutional development" rather than choice or actor –centric change, where emphasis is allocated "not just about moments of institutional selection and moments of institutional change, but of processes of institutional development unfolding over significant periods of time" (p.15).

Harking back to Bermejo's (2007) allusion of new informational field development being subjected to pre-existing institutions, analyzing the established player's responses to these new field formations is a legitimate point of departure. Historical institutional analysis "provides the basis for examining institutional origin and change as reflecting the interrelations among society's decision-makers, their past institutions, and the evolving environment within which they interact" (Grief, 1998, p.80). Grief (1998) contends historical institutional analysis weighs the gravity of

strategic interactions and exogenous and endogenous cultural features, beliefs, social structures, and cognition on the set of relevant rules....

Organizations alter the set of the relevant rules of the game by constituting a new player (the organization itself), changing the information available to the players...(p.81).

Thus, an analysis of the existing industry leader in television ratings (Nielsen) and its responses to these new field formations is the logical next step for understanding a convergence between traditional television and the new media environment.

The media trade press exemplifies “semi-embedded deep texts” which “function as forms of symbolic communication *between media professionals*, and help to facilitate ‘inter-group’ relations” (Caldwell, 2009, p.203). But this understanding, Caldwell (2009) adds, bleeds outside the industry as well, stimulating awareness in the areas of scholarship and the public sphere (p.203). In short, industry trade press enables corporate media companies (and media scholars) to develop and engage in “generalizing discussions of the nature and meaning” of the industry (Caldwell, 2009, p.203). For this reason, I employed a historical institutional analysis of industry trade press to examine the institutional change occurring within audience measurement, and thus the field of television.

Following a temporal line of media development research, specifically from January 2006 to August 2015, I analyze and then categorize Nielsen’s response(s) to the emergence of new media information regimes along one of three dimensions of institutional development: 1) layering – “the partial renegotiation of some elements...while leaving others in place”, 2) conversion – “situations where ‘existing

institutions are redirected to new purposes, driving changes in the role they perform and functions they serve” or 3) diffusion – suggesting “the wholesale replacement of institutions” (Pierson, 2004, pp.137, 138, 139). In framing my historical institutional analysis in the brief history of the new media environment, Fountain’s apt description of why regimes like Google dominate the new media environment echoes Leblebici’s (1991) contentions of the role of fringe players affecting institutional development,

Digital technologies force focal points and standards in order to gain benefits of coordination that are stronger than other forms of coordination due to shared data and communication channels; they have large sunk costs; they are rigid and inflexible over and above inflexibilities introduced by path dependence; they are poorly understood thereby leaving expertise and considerable decision making power to ‘peripheral’ players with agendas outside those of core interest groups involved (Fountain, 2011, p.4).

This significant period of time, the brief history of new media, is ripe with instances of new media information regimes rising to prominence, affecting differentiation within sources of market information within the television ratings industry through the creation of new niches, and thus substantiating the need to study the environment and players in this transformative dynamic.

Chapter 4: Results

This section presents Nielsen's response to the rise of new media information regimes and outlines the institutional development occurring within the field of television measurement. Crucial to understanding these developments and Nielsen's response to the emergence of new media information regimes is recognizing the growing de-standardization present in audience measurement between 2006 and 2015. For my research purposes, I define the de-standardization of audience measurement as the substantial increase in measurement metrics sought by television industry players and produced by audience measurement firms to measure both broadcast and digital television consumption. This surplus of metrics coincided with the new media environment's emergence as a legitimate alternative to traditional television for audiences' consumption of video content. This supplementary position varied from the television industry's previously held belief that the new media environment would serve as a complementary platform for television content, where "virtually all of the major programmers have launched video-rich broadband Web sites or cut cellphone TV deals, believing those will bolster their core networks" (*Broadcasting & Cable*, 01/25/2006).

The audience measurement de-standardization that accompanied this shifting view of the new media environment resulted predominantly from 'advertisers' concentrated interest in new media, particularly because of the assured return on carefully targeted ads'. With no semblance of an industry accepted standard for digital video measurement however, and quoting a cable provider executive, "the real barrier is measurement" (*Broadcasting & Cable*, 01/25/2006). For these reasons, I temporally

dissected Nielsen's response into three phases, acknowledging the television industry's acceptance and adoption of the new media ecosystem as a supplementary platform to traditional television. Doing so allows me to identify and determine specific instances of institutional development occurring in audience measurement in the field of television. Together this section provides the necessary evidence to answer the research questions, I posed, which I explicate in the discussion that follows.

Tables *A*, *B*, and *C* located in the appendix (p.50) briefly outline and categorize Nielsen's response(s) to the emergence of new media information regimes, along with Pierson's labels of institutional development (layering, conversion, and diffusion) for each response. Alongside Nielsen's response(s), the developing trends being included in audience measurement are also listed. Additionally, the actions of Nielsen's clients are included to provide industry-wide context for the developments in audience measurement. These tables are meant to serve as a quick, temporal reference for the proceeding subsections of my research.

Phase 1: 2006 - 2009 – Towards a Cross-Platform Focus

Parallel to this industry-wide de-standardization, Nielsen was somewhat absent from the developing front of new media, according to its clients. This absence coincided with the internal restructuring of Nielsen's parent company (VNU), and Nielsen updating its legacy ratings system (with the decision to abandon its paper diaries in small markets). Despite Nielsen's absence, the amount of measurement metrics (out-of-home, second screen, time-shifted viewing, commercial ratings, to name a few) being demanded from Nielsen and its competitors by its clients continued to increase. The rising prominence of mobile platforms compounded this measurement de-standardization as video content

became increasingly consumed on smartphones, and later, tablets. In response to its clients' growing and fragmented audience measurement demands, Nielsen pledged its efforts to its Anytime Anywhere Media Measurement (A2/M2) plan in 2006, following "an upfront in which the focus has been on buying both on-air and online TV properties. Nielsen purports that agencies will be able to use the data in their planning tools to 'optimize combined TV/internet campaigns'" (*Advertising Age*, 06/19/2006). This A2/M2 plan would later be referred to as cross-platform measurement, and with it, Nielsen "declares that it is committed to 'follow the video' with an all-electronic measurement system that will deliver integrated ratings for television viewing regardless of the platform on which it is consumed" (*Broadcasting & Cable*, 06/14/2006).

To accomplish this cross-platform initiative, Nielsen began acquiring mobile and digital measurement startups early on, such as Telephia in 2007, Mediamark in 2008, and Koreanclick in 2009. Furthermore, Nielsen, "which has been on a spending spree of late, acquiring or forming alliances with a plethora of small media measurement companies... will now have a direct pipeline into the dominant online advertising company" (*Broadcasting & Cable*, 10/24/2007), exhibited by its 2007 partnership with Google, in an attempt to measure and understand consumer purchasing behavior and online ad campaign effectiveness. This move to acquire and partner with new media startups instead of its entrenched competitors, as Nielsen initially opted out of acquiring Arbitron in 2006, belied Nielsen's motives for the new media environment: "By extending into measurement of audiences of emerging media venues, and by lacing its reach-and-frequency expertise with some behavioral data, Nielsen believes it can maintain its authority" (*Advertising Age*, 04/07/2008).

Nielsen's digital measurement monopoly aspirations however proved more tangible in concept than implementation. Measurement de-standardization and the relatively cheap cost of web advertising, when compared to television advertising, emphasized one of the primary complications with digital ads, and thus the television's industry's adoption of cross-platform measurement:

As long as web advertising remains so cheap to buy, it's simply not worth advertisers spending major amounts of money on research. And until the research gets done to prove effectiveness, advertisers are unwilling to pay markedly more for online ads (*Advertising Age*, 05/18/2009).

With insufficient research and development for web advertising, the television industry (the advertisers and content providers) had to rely on the pre-existing means of transacting their business, thus further legitimizing Nielsen ratings. These ratings, while still used and with their own inefficiencies, permitted Nielsen to maintain its measurement monopoly in television AND continue acquiring new media players, and thus a more advantageous position in the new media environment. Advertisers and content providers, in turn, continued to hemorrhage an increasing amount of capital due to unmeasured digital video consumption. This realization caused advertisers and content providers to cooperatively leverage Nielsen into carrying more of the research and development costs for cross-platform measurement by forming

the Coalition for Innovative Media Measurement (CIMM), a seven-figure initiative designed to create a measurement that would allow the comparison of advertising performance across different channels...For these heavyweights to take matters into their own hands seems like a no-

confidence vote in Nielsen...Still, some of the comments from the parties involved seemed to suggest that perhaps this was more about pressuring Nielsen to get it done, than replacing Nielsen as a standard—they even talked about this being a panel-based tool, which, of course, is Nielsen’s strength (*Advertising Age*, 09/14/2009).

Nielsen responded to its clients’ aggression head on, announcing its comprehensive schedule for implementing a one-stop approach for its clients at an October summit in 2009. “The end game would be monetizing Web viewing of TV more effectively...that would include shows watched online. The idea of tracking consumers’ media habits on TV and online is referred to as single-source measurement” (*Broadcast & Cable*, 12/01/2009). Interestingly, Nielsen’s single-source measurement initiative *did* materialize in the form of a more comprehensive panel, with an ‘estimated sample, including 20,000 people and 7,500 households, accounting for 12,000 computers’ (*Broadcast & Cable*, 12/01/2009). At this point, advertisers and content providers were desperate for a standardized cross-platform metric, having all but explicitly coerced Nielsen into cooperation (with the establishment of CIMM). More interestingly however, its clients’ move to pressure Nielsen into standardizing cross-platform measurement actually worked to legitimize the television measurement leader in the new media environment.

Phase 2: 2010 – 2012 – Harnessing Social and Mobile Media

With the television industry’s attention now focused towards standardizing cross-platform measurement, Nielsen continued acquiring and partnering with emerging new media startups and thus expanding its foothold in the new media environment. This

included partnerships with Facebook in 2010 and Twitter in 2012, as well as app developers. Meanwhile, Nielsen's clients and competitors (Rentrak, Quantcast, and comScore) also began acquiring new media startups,

...as providers look to become a one-stop shop for cross-media data... The insatiable desire on the part of marketers and media companies for better ROI through increasingly sophisticated targeting has fueled the recent acquisitions of audience measurement/analytics firms this past year.

Meanwhile, the proliferation of companies in the analytics space has also help drive consolidation the last few months (*Gigaom.com*, 02/10/2010).

This foray into the new media environment by more television industry players however produced no immediate solution to standardizing cross-platform measurement. Instead, similar endeavors to CIMM were mimicked by an increasing amount of media industry players, including the Making Measurement Make Sense (3MS) initiative,

...a project of the Association of National Advertisers, Internet Advertising Bureau and 4A's, along with a an impressive list of backers, including Google, AT&T , Coca-Cola , CBS, Group M, ESPN, Omnicom, Microsoft, Starcom MediaVest Group, New York Times and others...Helping with the 3MS project has been the Media Ratings Council, which accredits and oversees TV and radio ratings from Nielsen and Arbitron , and has accredited digital audience measurement by Quantcast...and Nielsen (*Advertising Age*, 09/19/2011).

Alongside the emergence of these web-focused coalitions, similar activity transpired surrounding developments in traditional television viewing. With the adoption of set top

boxes by the television industry, advertisers and content providers were convinced that these black boxes held vast stores of audience data. All that needed doing was standardizing set top box data use, or so the television industry players thought. In reality, ...getting the data into the hands of research companies, media outlets and media buyers has been slowed because the individual distributors who own it have business and legal issues to deal with. Operators believe the data is valuable and want to make sure they're being compensated for it. They are also legally required to keep customer data private and must make sure appropriate safeguards are in place before any data is released (*Broadcasting & Cable*, 08/10/2010).

While the potential of set top box data too stalled, audiences continued consuming an ever-increasing amount of digital video content, exhibited by a substantial increase in non-traditional viewing (on websites and apps like Hulu Plus, Netflix and HBO Go), on mobile devices especially. As advertisers and content providers failed to successfully standardize digital video consumption, they quickly endorsed Nielsen, and its competitors, to 'crack the digital app economy', seeking to compete with subscription-based digital content silos for audiences. The television industry's problems with the booming app economy however pertained to pricing models and, again, measurement, with many content providers remaining skeptical,

After experimenting with paid apps, CNN moved last year to free apps, which has dramatically expanded the reach, with downloads passing the 10-million mark this July...But measurement of mobile usage is still in its infancy and solutions to the problem seem at least a year or more

away...Mobile advertising continues to be stunted by a lack of good measurement. Comcast will be testing mobile measurement with Nielsen later this year, but most programmers expect it will be a year or more before better metrics are available (*Broadcasting & Cable*, 08/08/2011).

Parallel to the emerging app economies, and the new media startups substantiating them, Nielsen hailed the prevalence of social media in facilitating the distribution of digital video content in the mobile space. “More and more people are consuming content on smartphones and tablets but, until now, the rankings that determine websites’ popularity have largely failed to account for them” (*Gigaom.com*, 11/29/2012). Realizing the vast amount of unmeasured digital video consumption on mobile devices, Nielsen pivoted focus, and began specifically partnering with and acquiring social media measurement startups. Furthermore, custom studies conducted by Nielsen shed light on the fact that many audience members routinely used their phones and tablets to engage with social media while watching traditional television.

Another change to the social media landscape is the continued growth in the so-called ‘second screen’ – that is, turning watching TV into a more social experience by using a smartphone or tablet alongside your TV viewing. The report found that, as of June 2012, over 33 percent of Twitter users had tweeted about TV-related content. Also, 44 percent of tablet users in the U.S. and 38 percent of smartphone users use their devices daily to access social media while watching TV (*TechCrunch.com*, 12/03/2012).

Finally, a tangible solution for standardizing cross-platform measurement had crystallized. It was a rough concept initially, but Nielsen forecasted that in framing cross-platform measurement for television in a social media and mobile context, it could solve two quandaries at once: begin accounting for a large portion of the previously unmeasured mobile viewing of content AND harness that unmeasured mobile engagement into a complementary format for its pre-existing ratings system.

Nielsen wants to use SocialGuide to measure the monetary value of social TV. The startup's social TV measurement and engagement tools will be 'integrated immediately' into NM Incite, Nielsen says, and the combined companies will try 'to quantify the relationship between social TV and TV ratings to enable advertisers to maximize the impact of their spend, and provide new research metrics to understand social TV's impact on consumer behavior and viewing habits' (*TechCrunch.com*, 11/12/2012).

Before 2012's end, Nielsen announced its partnership with Twitter. The purpose of the partnership was to develop and gauge the effectiveness of Social TV Ratings.

The new Twitter ratings are supposed to complement Nielsen's existing TV ratings, and will be built on top of the SocialGuide platform offered by NM Incite...the new rating will measure "the total audience for social TV activity – both those participating in the conversation and those who were exposed to the activity – providing the precise size of the audience and effect of social TV to TV programming (*TechCrunch.com*, 12/17/2012).

Nielsen quickly assured its clients that these new social TV ratings sought to complement its existing legacy ratings system. Additionally, Nielsen clarified that any changes to the

pre-existing ratings economy from this new social media venture would be gradual, and wouldn't disrupt its clients' buying and selling habits.

Phase 3: 2013 -2015 – A Budding Cross-Platform Measurement Monopoly

With the solution to cross-platform measurement framed in a social mobile context for its clients, Nielsen looked to legitimize its social TV ratings by converging them with its legacy ratings system. Additionally, and what gained more attention from the television industry AND the FTC, was Nielsen's acquisition of its competitor Arbitron in 2013.

The commission agreed to let Nielsen buy Arbitron for approximately \$1.26 billion, but not without conditions requiring the combined company to cultivate its own competition in the cross-platform ratings space. The FTC concluded that without the divestiture of that intellectual property, everyone in the video food chain—from advertisers to agencies to programmers—would be forced to pay more for cross-platform audience measurement (*Broadcasting & Cable*, 09/30/2013).

Realizing the advantageous position Nielsen had carved out for itself in the new media environment, the FTC halted the acquisition of Arbitron and erected anti-monopoly safeguards for a not yet existent cross-platform ratings economy.

To secure FTC approval, Nielsen had to agree to license the Arbitron technology for cross-platform measurement for up to eight years to a third party, most likely comScore...The commission wants the new buyer to become a legitimate competitor in cross-platform ratings, and Nielsen has to make sure that happens. It must provide technical assistance, and

ongoing TV and radio ratings data, and cannot prevent the third party from hiring ‘key’ Arbitron employees (*Broadcasting & Cable*, 09/30/2013).

Despite these anti-monopoly efforts, Nielsen’s clients still bemoaned the fact that no standard for cross-platform measurement had gained industry-wide acceptance. With a plethora of audience measurement metrics (video-on-demand, time-shifted (live, live plus same day, 3 day and 7 day) viewing, commercial ratings (C3 and C7), out-of-home viewing and set-top box viewing) still being cobbled together in a piecemeal fashion to measure digital video consumption across all screens, Nielsen’s clients began admitting that another measurement monopoly would be tolerable as long as it brought cross-platform standardization.

With an already substantial position in the new media environment, Nielsen set out to wrangle in the last piece missing from its comprehensive cross-platform measurement action plan: mobile viewing.

To develop its cross-platform measurement system, Nielsen settled on creating SDKs—software development kits—that clients can insert into their video players and apps. Nielsen then uses third-party providers such as Facebook to assign demos to the viewing. That approach allows the rollout of three new components of Nielsen’s cross-platform measurement solution in 2014, and two parts have already been completed. The first was to add smartphone and tablet measurement to its Digital Program Ratings, or DPR. ‘The idea was to enable clients—who have episodic TV that they make available online—to get audience measurement that is comparable

to TV,' says Eric Solomon, senior VP of global product leadership, Nielsen
(*Broadcasting & Cable*, 09/15/2014).

The potential inclusion of mobile viewing proved all the more reason for advertisers and content providers to endorse Nielsen to expedite an industry-accepted standard for cross-platform measurement. Nielsen however was quick to point out that clients shouldn't expect overnight changes with the inclusion of mobile measurement.

'We have some apps that are in the app store already with the ability to measure for mobile TV ratings. We have many other clients that are at different stages of testing apps, embedding the meter into their apps. We have some clients that are getting tested and starting to see the data...So this will be much more of a sort of rolling wave of data that gets turned on as different clients are ready to turn that data on and include it in the TV ratings' (*Broadcasting & Cable*, 09/29/2014).

Alongside the inclusion of mobile video consumption into its television ratings, Nielsen's social TV ratings were capable of supplying demographic information about its audiences to its clients,

...delivered overnight for programming across the supported networks at the episode, program, network, and total TV levels...the models for deriving demographics are based on a combination of features, including things like the user's first name, accounts it follows, details found in the bio/profile text, as well as text of the user's recent tweets, handle and more. Those results are then validated against Nielsen's Online Panels
(*TechCrunch.com*, 05/19/2014).

This information proved enticing for Nielsen's clients, as advertisers and content providers had sought such demographic information in traditional television viewing long before the emergence of the new media ecosystem. Yet this progress in cross-platform measurement only invigorated Nielsen's efforts.

Having assuaged its clients with significant developments in cross-platform measurement, Nielsen next turned its attention to the new media players that directly competed with the television industry: the subscription-based digital video content silos. Between 2014 and 2015, Nielsen began working to measure Netflix, Amazon and Roku content viewing. Initially, this news baffled the television industry, as "Nielsen will be relying on audio recognition technology embedded in its existing ratings meters. But it's unclear how closely Nielsen's metered-household sample matches up against Netflix's subscriber base" (*Gigaom.com*, 11/23/2014). Rather than focus on what Netflix and other content silos stood to gain from a Nielsen partnership, the converse belied Nielsen's new media monopoly undertakings. As digital video content silos continued to compete with traditional television content providers, Nielsen positioned itself to secure a strong working relationship with yet another group of emerging players.

At this juncture, Nielsen's position in the new media ecosystem began to solidify. "Nielsen's stance is that it is able to measure nearly all viewing, but what's included in the ratings is up to the industry" (*Broadcasting & Cable*, 06/29/2015). Based on this evidence I find that Nielsen adopted a 'portfolio strategy' in response to the emergence of new media information regimes. This answers RQ1. Due to this strategy Nielsen was able to frame how, where and when cross-platform measurement was substantiated and conducted (through a social and mobile context). This permitted Nielsen to successfully

expand its measurement monopoly in the new media environment, parallel and complementary to its existing measurement monopoly in television. This answers RQ2. In the section that follows, I discuss the theoretical implications of my findings on each of the RQs.

Chapter 5: Discussion

Summary

The de-standardization of the television industry's conceptions of audience measurement worked to further legitimize Nielsen's increasingly opaque leadership position, and its ratings currency, in two major ways: First, de-standardization sustained the demand for pre-existing television measurement (traditional Nielsen ratings), as it was the only industry-accepted form of standardized currency to maintain the \$70 billion annual ad buying and selling between advertisers and content providers, remembering that "the constitution of field is information regimes-dependent" (Anand and Peterson, 2000, p.281). Relying on the imperfect but accepted Nielsen ratings to sustain their television-based revenues, advertisers and content providers, while skeptical and unfamiliar, turned to the new media environment, acknowledging its lucrative potential. In refusing to provide substantial research and development costs for facilitating online video measurement however, content providers and advertisers ultimately failed "to achieve the level of stability reached in the broadcasting ratings industry through the creation of a standard and widely accepted measuring operation" (Bermejo, 2009, p.143).

After failing to monetize online video consumption, advertisers and content providers coerced Nielsen into cooperation by forming multiple coalitions, including the Coalition for Innovative Media Measurement (CIMM) in 2009, the Media Research Council's Making Measurement Make Sense (3MS) initiative in 2011, and various partnerships with Nielsen's rivals, comScore and Rentrak. Second, and more importantly, this de-standardization allowed Nielsen, as the premiere audience measurement regime,

to explicitly structure the television industry's developing perceptions and understanding of online measurement, thus steering a major wave of 'institutional development' in the field of television merging with new media (Grief, 1998, Pierson, 2004, and Fountain, 2011). The demand for online measurement enabled Nielsen to make the case for cross-platform measurement, and cement cross-platform measurement's foundation in its own legacy ratings monopoly. This early structural influence accredited Nielsen as the premiere audience measurement regime in the analogue broadcast AND new media environments. All of these developments within the field of television accredit the seemingly permanent nature of the endogenous functional pressure of audience measurement, as each development 'arose from perceived problems in performance levels associated with institutionalized practices' (Scott 2014, p.167).

In recognizing audiences' preference for consuming digital video on mobile devices and social media platforms alongside traditional television, Nielsen, with its growing foothold in digital video measurement, moved to propose a solution to standardize cross-platform measurement. The solution to cross-platform measurement, according to Nielsen, lay within the new mobile and social media informational niches of digital video consumption, signified by the substantial market penetration achieved by smartphones and tablets after 2010. This solution was backed by custom studies produced by Nielsen, explaining that audiences simultaneously engaged with their mobile devices, specifically social media apps, while watching television. This proposal of course paralleled Nielsen's own various ventures into measuring digital audiences, having already acquired, partnered, or merged with mobile new media information regimes,

including Facebook in 2010, SocialGuide and Twitter in 2012, Netflix in 2014, and Roku in 2015.

RQ1: Nielsen's Response to Online Market Information Regimes

Nielsen, completely aware of the endogenous functional pressure (the imperfect but accepted nature) of its television ratings currency, responded with what it calls a 'portfolio strategy' (Advertising Age, 03/06/2006) to the emergence of new media information regimes. This 'portfolio strategy' response also acknowledges and synthesizes the exogenous functional pressure (shifts in audience preference) of television viewing, as Nielsen realized the consumption of digital video now takes place on a countless number of devices, including PCs, mobile phones and tablets, and even still, television. As the viewing of digital video shifted to a cross-platform phenomenon, Nielsen understood that new media information regimes (what *we* now know as Google, Twitter, Facebook, Netflix, etc) would emerge as fringe players. These new media information regimes, in turn, supplied the television industry with new subfields of information on their audiences, via their automated algorithms, that could potentially compete with, and thus 'erode the relevance of the previous core resources', Nielsen ratings (Leblebici, 1991, p.359). Nielsen's 'portfolio strategy' is an example of a mature organization attempting to institutionalize the inclusion of the new niches within audience measurement in the field of television. This 'portfolio strategy' afforded Nielsen the opportunity to expand its pre-existing ratings monopoly in the new media environment, which 'caused a cognate change in participants understanding of the field itself' (the cross-platform consumption of digital video and its measurement) (Anand and Peterson, 2000, p.281). Just as crucial however was Nielsen acknowledging that the

endogenous functional pressure (the ‘imperfect yet accepted’ nature of its ratings) would persist in the new media environment, given the “institutionally effective” disposition of ratings systems (Ettema and Whitney, 1994). For in the new media environment, cross-platform measurement still limited “to some degree the scope and detail...of media content, audience response, and audience characteristics measurement” (Miller, 1994, p.59). Thus, Nielsen positioned itself accordingly, acquiring or partnering with new media fringe players, and thus directly or indirectly occupying the developing market information niches in the field of television.

Securing these developing niches in the field of television occurred gradually however, and was a result of Nielsen continually adapting its ‘portfolio strategy’ for a now cross-platform focused industry. As to the specifics of Nielsen’s ‘portfolio strategy’ for audience measurement, the overall theme was ‘following the video’ consumption across platforms. As mobile devices and social media sites (and later, apps) morphed into legitimate distribution platforms for digital video, Nielsen committed to early partnerships and M&As with rising mobile measurement and new media information regimes, including Telephia and Google in 2007, Mediamark in 2008, and Koreanclick in 2009. But this shift to a cross-platform focus was wrought with audience fragmentation and measurement de-standardization, both contributing to the “ever-growing tension between the elusiveness of the audience and the eagerness of audience producers to measure it” (Bermejo, 2009, p.141). As new media information regimes helped produced countless new measurement metrics (and information niches), the television industry’s measurement demands, and, broadly, the understanding of the TV industry field itself, proved to be increasingly opaque, with a now even greater number of players ‘adopting

whatever model suits their purpose at the moment' (Webster and Phalen, 1994, p.33). These industry measurement demands included more varied video-on-demand, time-shifted (live, live plus same day, 3 day and 7 day) viewing, commercial ratings (C3 and C7), out-of-home viewing and set-top box viewing.

While Nielsen's clients and competitors attempted to incorporate these numerous metrics into broadcast television, Nielsen had broader ambitions. In being leveraged into carrying the considerable upfront costs of online audience research and development (thanks to their clients) Nielsen, in a sense, was able to initially recognize these new niches and the players occupying them. After endorsing (and acquiring or partnering with) the developing niches (and regimes therein) that complemented its pre-existing ratings economy, Nielsen presented a new measurement methodology to the television industry: one that was "a fundamentally different view of the scope of the field, one that involved field-wide focus on absolute counts" of total television viewing on all screens, not just broadcast television (Anand and Peterson, 20000, p.282). By identifying these new market information niches and in tapping the potential of new media information regimes early and continually, Nielsen carved out the beginnings of a budding monopoly within cross-platform audience measurement, very much resembling its traditional television ratings monopoly.

RQ2: Consequences of Nielsen's 'Portfolio Strategy'

The long-term consequences of Nielsen's 'portfolio strategy' response to the emergence of new media information regimes are still unfolding for the television industry. Currently Nielsen is working to further standardize its cross-platform audience measurement monopoly, aggressively advocating for social TV ratings, highlighted by

additional partnerships with existing and new clients alike. Nielsen's custom order measurement study with ABC/ Disney and iPad usage in 2012, the heavily FTC-regulated 2013 acquisition of Arbitron, and distributing a mobile friendly software development kit (SDK) for digital video developers in 2013 are such examples. As preliminary data comes in from its Twitter branded Social TV Ratings venture, Nielsen will continue rationalizing the benefits of the social and mobile information niches to its clients, and prepare for future cross-platform ventures, like partnerships with Netflix, and Amazon. As advertisers and content providers continue to advocate for new key performance indicators for digital video content ('performance ratings' and 'viewability' are two of the current), the endogenous functional pressure of imperfect measurement remains. What's clear however, gleaned from Nielsen, is that the focus of audience measurement now pertains to the emerging information regimes supplying additional niches to the television industry. Harnessing these new niches and regimes will be pivotal in future audience measurement endeavors, as advertisers and content producers will opt for the additional audience data instead of discarding it.

In understanding how these new market information regimes would affect change in audience measurement, where the "inclusion of new categories of market information within an existing market information regime can help create new market niches" (Anand and Peterson, 2000, p.282), Nielsen's 'portfolio strategy' afforded them the ability to identify, categorize, and then facilitate its involvement within these emerging niches. Nielsen made specific acquisitions and partnerships with leading new information regimes within these niches as they developed. In doing so, Nielsen influenced how and which of these new subfields of market information were adopted or disregarded by the

television industry. For this reason, cross-platform measurement is currently rooted in the social and mobile measurement niches. In light of these developments, interesting questions then surface: Will the number of niches and new media regimes causing differentiation within digital video measurement continue to increase? Will differentiation within the field of television be stymied, intentionally or otherwise, by any particular industry player? For Nielsen, it won't matter what metrics its clients want measured specifically. Securing the budding cross-platform measurement monopoly is Nielsen's ability to identify and then occupy the information niches and regimes of digital media consumption.

Nielsen's 'portfolio strategy' for cross-platform measurement very much coincides with Pierson's labels of institutional layering, or "the partial renegotiation of some elements...while leaving others in place"(2004, p.137) and institutional conversion, where some of Nielsen's efforts have been "redirected to new purposes, driving changes in the role they perform and functions they serve" (2004, pp.138). This is evidenced by the numerous acquisitions and partnerships with its competitors and new information regimes. In actively structuring the cross-platform focus of the television industry's perceptions of online measurement, Nielsen has legitimated its leadership position as the TV industry's premiere media information regime. Additionally, Nielsen will continue assuring clients that any standardization process for cross-platform measurement will be a gradual one. These new metrics, according to Nielsen, will not work to disrupt the current ratings economy, but instead complement it, thus exhibiting an explicit instance of 'institutional layering'. The television industry doesn't have much of an option anyways, as they still rely on Nielsen's legacy currency for tens of billions of dollars in

annual TV ad buying and selling. As the cross-platform measurement of digital video content is further refined and standardized (with the elimination of overnight ratings, second-by-second ratings, and other inefficiencies), more advertising dollars will flow into the new media environment, possibly detracting more ad buying from television. Regardless of where the money goes however, it, like Nielsen, will ‘follow the video content’. Akin to cross-platform measurement, the new media environment is continuously developing. Within this dynamic information field, Nielsen will continue employing a ‘portfolio strategy’, cultivating and then occupying new niches of market information that coincide and enhance its existing ratings currency. Nielsen will accomplish this by continuously tapping emerging new media information regimes, working to maintain and expand its leadership position in digital audience measurement.

Conclusions and Limitations

After analyzing Nielsen’s response to the rise of new media information regimes from the four media trade publications, it’s evident that Nielsen is seeking to extend its measurement monopoly in the new media environment. To no surprise, as the television ratings leader, Nielsen adopted and endorsed developing regimes and niches that coincided with the categories of institutional layering and conversion as opposed to outright diffusion, as they functioned to maintain Nielsen’s leadership position and brand identity within the field of television. In rooting my analysis in the context of the exogenous and endogenous functional pressures of the television industry, it’s clear that Nielsen works in a bidirectional relationship with its clients: they both act upon each other through their transactions. Nielsen’s existence is legitimated by its clients’ measurement needs after all. But when Nielsen identifies new informational niches

within the television industry years before its clients do (the cross-platform consumption of digital video content via mobile and social media), what is its first obligation? Does Nielsen vet the long-term reliability and feasibility of these emerging niches and new information regimes for the betterment of the industry? Or does Nielsen position itself to directly or indirectly occupy these industry niches and the newer regimes, and in turn seek to expand its measurement monopoly in new industry subfields? Evidently, the latter is clearly the case, but even so, given the nature of the field of television, change is inherent and unceasing, exhibited by audience behaviors, and economic trends between industry players, or as the FTC recognized, emerging economies and potential monopolies.

While my analysis of Nielsen's response to the rise of new media information regimes, and the new market information niches therein, outlined specific developments in television audience measurement, the long-term consequences of these developments remain undetermined. Future research needs to be conducted analyzing the effects of new media information regimes and the developing niches and field differentiation they produce. For instance, does Nielsen's inclusion of new media information regimes and niches work to converge or diverge the various *models* of the audience? Given in the inclusion of social and mobile niches, "all who wish to electronically communicate to a mass audience are free to do so" (Webster and Phalen, 1994, p.33), now more than ever. Webster and Phalen (1994) suggest "that technological developments are gradually minimizing flaws in the marketplace, and that as this happens the role of audience models will become increasingly clear" (p.33). Evidenced by the wide range of audience measurement metrics available to advertisers and content providers, and thus enabling

Nielsen to endorse regimes and niches that align with their existing ratings economy, the ‘minimizing of flaws’ seem to actually indicate the expansion of Nielsen’s measurement monopoly. Additionally, should Nielsen’s new subfield-based metric, its Social TV Ratings, attain industry-wide acceptance, how will Nielsen ensure its construction of a reliable audience reality for its clients? As Miller (1994) explains

“what a syndicated audience measurement service seeks to establish is a social *convention*...to achieve this status...there must be an appeal...to the inherent correctness of the measurement process for revealing the audience in question, and there must be a demonstration that the information that emerges from the measurement process is eminently practical for day-to-day activities, easy to understand and manipulate, and not disruptive to entrenched routines” (p.66).

By including the subfields of mobile and social media, Nielsen invites potential for new media measurement inaccuracies, as the new media environment provides audiences the opportunity to create a wide range of identities, profiles, and avatars. Whereas metered households were recruited and managed by Nielsen field representatives in person, the new media ecosystem permits audiences to escape measurement inclusion altogether. Furthermore, what are the effects of new media regimes’ and niches’ inclusion on audience diversification and specialization? As Barnes and Thomson (1994) observed “audience measurement technologies play a vital role in sustaining the media whose audiences they measure...they have facilitated the specialization of mass media” (p.92). But as noted in my research, advertisers remain skeptical of new media ad buying over television. Will the inclusion of new information regime data (gathered from automated algorithms) prove an enticing enough investment for advertisers, ‘ultimately determining

the degree of audience diversification' (Barnes and Thomson, 1994, p.92)? Lastly, how does the inclusion of new media subfields and regimes affect the microeconomic model of media flows and economics of audience making? As Wildman (1994) concludes "media flows are constructions of the audience in the sense that they mirror basic characteristics of the audience itself. If the composition of the audience were to change, the flows would too" (p.137). Now that Nielsen includes mobile and social media-centric consumption of video content in its representations of its clients' audiences, will the geographical and political boundaries (domestic or international) in turn diminish or increase? In line with Wildman's conclusions, will these developments in audience measurement expedite the exportation of western ideals and consumerism to foreign states? These are but a handful of long-term, consequential questions that now beset media scholars as Nielsen seeks to merge traditional television with the new media environment. What's clear in this new media environment, however, is the importance of analyzing these developments with an institutional historical lens. Doing so allows media scholars to unravel how and why particular developments within the new media landscape transpire. More pertinent however, within this brief history of new information regimes and niches emerging in the new media environment, these institutional developments merging traditional and new media are still unfolding.

The research presented in this paper is another example of the ongoing discussion of the transformative effects of new media and the Internet on traditional media industries in real time. In a way, my research is a response to a call to action in analyzing the "ongoing discussion of the Internet and its potential impact on various media" (Napoli, 1997, p.425). Many studies on audience measurement call to attention the fact that monopolies

seem to proliferate in this particular information field. In drawing on the television industry's reliance on their traditional ratings (evidenced by Nielsen's clients refusal to front the research and development costs for cross-platform measurement), Nielsen was able to further expand its measurement monopoly, in accordance with Leblebici's institutional findings, "Because the creation and change of institutions are expensive, they require high levels of interest and resources. Only institutional entrepreneurs, who are organized and possess sufficient resources, are capable of introducing institutional change" (p.336). Few studies however seek to explicitly and holistically address why these measurement monopolies precipitate. In analyzing the television industry measurement leader's responses to developments in digital audience measurement, my research attributes Scott's 'functional pressures' as a driving factor in the creation of the new information regimes and niches in audience measurement within the field of television. Nielsen, in turn integrated these functional pressures into its 'portfolio strategy' for expanding its measurement monopoly into the new media environment. In synthesizing these functional pressures, Nielsen again has facilitated "continuity in ongoing fields by providing a focus of attention around which participants can cohere" (Anand and Peterson, 2000, p. 281), for the television industry in the new media environment, this focus is cross-platform measurement, framed within the social and mobile media niches and new information regimes.

Further research in the field of audience measurement and new media development needs to be approached with a historical institutional lens. Doing so allows media researchers to understand how and why pre-existing players possess significant potential to affect institutional development, as "the constitution of field is information regimes-

dependent, because reframing the scope, methodology, or tone of market information regime creates a cognate change in participants understanding of the field itself' (Anand and Peterson, 2000, p.281). Within this new media environment, Anand, Peterson and Leblebici's findings of field formation and differentiation, catalyzed by fringe players, and institutionalized by established organizations remain crucial to understanding the new media developments currently transpiring, well beyond audience measurement. More attention needs to be paid to the established players, emerging fringe players, and their convergent influence on institutional media development, as they will no doubt play a pivotal role in producing or inhibiting differentiation within their respective media fields.

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APPENDIX

Table A - Phase One: Towards a Cross-Platform Focus

	<i>2006</i>	<i>2007</i>	<i>2008</i>	<i>2009</i>
Nielsen's Response	Rolls out A2M2 plan Opts out of M&A with Arbitron	M&A with Telephia Partnership with Google	M&A with MediaMark	M&A with Koreanclick Oct. Summit with clients, rolls out single-source measurement
Measurement Technology	Begins phasing out paper diaries	Pre-existing Nielsen panels and meters		Enhanced electronic panel (12,000 computers)
Activity of Nielsen's Clients	Continued development of digital ads and network websites	Demand for cross-platform standardization	Refusal to provide R&D for cross-platform measurement	Establishment of CIMM
Type of Institutional Development (Pierson)	Conversion	Layering	Layering	Layering

Source: Prepared by the author using articles from *Advertising Age* and *Broadcasting & Cable*

Table B - Phase Two: Harnessing Social and Mobile Media

	2010	2011	2012
Nielsen's Response	Partnership with Facebook Partnership with ANA for commercial ratings development	Ends patent war with ComScore, enter cross licensing agreement M&A with NeuroFocus	M&A of SocialGuide Partnership with Twitter Custom iPad study with ABC/ Disney
Measurement Technology	Set Top Box data added	Online and commercial ratings now included	Social TV ratings
Activity of Nielsen's Clients	App development	3MS Initiative	Demand for mobile measurement
Type of Institutional Development (Pierson)	Layering	Layering	Conversion

Source: Prepared by the author using articles from *Advertising Age*, *Broadcasting & Cable*, *Gigaom.com*, and *TechCrunch.com*

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Table C - Phase Three: A Budding Cross-Platform Measurement Monopoly

	2013	2014	2015
Nielsen's Response	M&A with Arbitron Launches SDK For app developers	Partnership with Integral Ad Science, International scope	Begins seeking partnerships with content silos (Netflix)
Measurement Technology	Digital Program Ratings (DPR) included	Mobile viewing folded into online measurement Social TV ratings show audience demo information	
Activity of Nielsen's Clients	Higher new media ad spends / wider range of digital offerings		Holds Viewability Summit for digital ads
Type of Institutional Development (Pierson)	Layering	Layering	Layering

Source: Prepared by the author using articles from *Advertising Age*, *Broadcasting & Cable*, *Gigaom.com*, and *TechCrunch.com*