

Minutes from Quarterly CRE Meeting
December 6, 2012
Concierge Conference Centers
New York, NY



Members In Attendance: Brad Adgate, JoAnne Burns, Michele Buslik, Alex Corteselli, Laura Cowan, Paul Donato, Ed Gaffney, Nancy Gallagher, Janet Gallent, Hadassa Gerber, Tanya Giles, George Ivie, Pat Liguori, Jed Meyer, Dan Murphy, Michael Nathanson, Keenan Pendergrass, Dave Poltrack, Beth Rockwood, Bryon Schafer, Stacey Schulman, Ceril Shagrin, Kate Sirkin, Robin Thomas, Judy Vogel, Sharon Warden

Present by Phone: Cheryl Brink, Greg Iocco, Bob Ivins, Billy McDowell, Emily Vanides, Jack Wakshlag

Absent: Ira Sussman, Tom Ziangas

Also Attending: Tom Campo, Robin Kaver, Michael Link, Joe Mandese, David Marans, Pat McDonough, Richard Zackon

Ceril Shagrin called the meeting to order at 1pm commenting on the excellent attendance.

Ceril asked members to answer, in one sentence, one of three questions: What have you learned about audience measurement this year? What progress has the industry made this year? Who in the industry deserves a shout out for excellence research?

Responses included: the industry is not keeping pace with the

technology; mobile and tablets are a priority; it's rocket science; keeps getting more confusing; the more we know, the more we need to know; tracking change in media and audience measurement needs to improve; we had a measurement system that we became very complacent with but the dynamics have changed; realized once again that audience measurement is much, much difficult than it's ever been; fragmentation can be your friend if you measure small audiences; the growing divide between those working for quality research and those just wanting a number; shout-out to Ceril for so much time and effort in the Council; shout-out to full Council because best work being done is through the CRE; shout-out to Lisa Hymen for pushing forward on the Beyond Seven Measurement; progress is more collaborative; younger consumers have abandoned the way we grew up; a lot of attention paid to researchers to figure it out; we are going to move beyond C3 more quickly than thought; audience measurement has become more difficult; shout-out to Dave Poltrack for putting in spotlight psychographics and life stage; the power of good PR on behalf of bad research; publisher data with panel data has had great progress for measurement this past year; methodology changes make it hard to measure audience; viewers think about media and connect differently than we think they do; using mobile data collection tool is tricky; shout-outs to George Ivie and Sherrill Mane among others; that it's going to be impossible in the digital world to measure audience in any kind of consistent way; it's good that the profession is getting elevated within the environment and we're making some good progress; how much modeling is going to be part of our future; beware of fascination with shiny objects; learning what people do on mobile

is one thing but trying to use mobile as a data collection tool, that's really tricky.

Richard Zackon welcomed guests Robin Kaver of Nielsen and Joe Mandese of MediaPost.

Steering Committee

Richard shared that Greg Ross of P&G has left to go to China, and the vote to replace Greg will be at the end of the meeting today. New members were welcomed and potential members will in the future be encouraged to join a committee before joining CRE. A reminder was made for committees at the first of the year to (re-)select their Chairs.

Treasurer Report

Michael Nathanson reported the CRE will come in on budget for the year. Project spending will be at about \$2.6 million which is a little higher, but offset with savings in Administration. Need to get a sense of what next year looks like from members. Richard acknowledged Shelley for significant administrative savings.

Measurement Science

Michael Link reported that he is back on a permanent basis, and wants to meet with committee chairs to get back up to speed. Paul Donato stated he would do an update as to what's happening with research and development at each meeting. He will be more domestic now and more a part of CRE meetings. He remains Chief Research Officer for Nielsen and is focused on transformational, disruptive innovation, things that really are game changers.

Paul spoke to some predictive modeling for retail in Africa and the search for marker variables for TV ratings analysis; Bayesian modeling and spectral graphing are being used. He will discuss SocialGuide at the next meeting.

In the questioning which followed, issues arose regarding hybrid measurement beyond set top boxes (no timeline, no impact on current hybrid) and the challenge for client management to understand the measurement changes. Paul addressed the need to combine panel data with “data exhaust.” Jack Wakshlag raised the question of the predictive impact of social. Paul mention Mike Hess had done some analysis at Nielsen he would share. Dave Poltrack suggested care be taken in reporting these data through the press.

Audience Trends Update

Pat McDonough reported on multiple TV-related trends noting that new patterns and definitions around viewing are needed. These trends included Cord-cutting/ cord-swapping/ cord-never activities; new technologies/ new devices for content delivery: tablets and smartphones; the definition of a “TV Household”: the growing number of TV sets without a “traditional” television content supplier; new thinking about universe estimates; social changes impacting young-adult viewing; and time shifting and delayed viewing.

The presentation deck can be found on the CRE website.

<http://www.researchexcellence.com/documents/meetings/56.pdf>

A webinar will be setup for more discussion and time was rearranged to allow Pat to complete her presentation.

Communications Committee

Emily Vanides reported 255 members on LinkedIn. She also proposed adopting Basecamp to handle internal CRE coordination. CRE approved the funds. Tom Campo gave an update on upcoming press releases. Emily proposed hiring Mark Braff to conduct an independent analysis of CRE public communications. The CRE approved the funds. Emily spoke to possible upcoming webinars and minisummits.

ROI

Dave Poltrack reported the Sequent Partners proposal is in its first stage of interviewing. The goal is to get through discovery stage, review it with committee and have committee prepare the presentation at the next CRE Quarterly Meeting.

Social Media

Beth Rockwood showed some video taken from the Social Media TV Study.

A webinar of the full findings will be set up for Council members, including an analysis of 10 different program groups and intentions to view.

Return Path Measurement

Pat Liguori reported that the White Paper from One Touch Intelligence will be sent out and a second piece will be delivered as well providing data by DMA.

Media Consumption and Engagement

Joanne Burns reported on Phase One of the mobile viewing study to quantify usage. Phase two is a mobile app for recording all behavior for one week. CMB conducts the soft launch in January. A third stage is a

follow-up qualitative study. Some members of the committee have tested Nielsen's new "What You're Watching" app as well. Joanne gave a special shout-out to Greg Iocco of Scripps Networks for his contributions.

Local Measurement

Billy McDowell reported his committee issued an RFP to report out the findings of their research concerning the variability of local TV ratings over time. A vendor has not yet been selected.

Digital Research

Bryon Schafer introduced himself to the committee members. He discussed two projects, the first to be conducted by Gerard Broussard concerning viewability -- specifically with non-PC devices, connected televisions, gaming consoles, devices connected to the Internet to watch a video that are not traditional. The other would be conducted by Neurofocus measuring eye-tracking and brain waves. The purpose is basic learning toward establishing benchmarks.

Bryon made a request for funds of \$100,000 which the Council approved.

Big Data

Stacey Shulman claimed there is a need for the definition of what is Big Data and noted the gap between traditional researchers and the new class of data analyst. The committee may offer a white paper to address some fundamental questions.

Insights to Practice

Nancy Gallagher proposed transparency sessions with Nielsen, happening after webinars, with an expanded group of Nielsen people. She also

proposed tying into Nielsen's Emerging Leaders program.

Education Committee

Sharon Warden reported updating links on the website for internships and asked anyone that has them for their organization to contact Shelley to get them on the site. She would like to fund an ad in the Broadcast Education Association program. Sharon will check with BEA to see if it could be with 2012 funds. Sharon also proposed \$10,000 (from 2012 funds) for a student research prize and the CRE approved, pending legal restrictions.

Council Elections

At December quarterly meetings Council officers are elected. Michele Buslik nominated Ceril Shagrin for re-election as Chair of Council and Ceril was approved by acclamation. Michael Nathanson was similarly relected as Treasurer and Emily Vanides as Secretary.

A motion to elect Pat Liguori as Chair of the Steering Committee was made and seconded and the CRE approved the position.

Four CRE members offered to fill positions on the Steering Committee: Brad Adgate, Laura Cowan, Tanya Giles and Judy Vogel. All were voted onto the committee.

New Business

No new business to discuss at this time.

Adjournment

The meeting was adjourned at approximately 4:20p.m.