

Minutes from Quarterly CRE Meeting
September 20, 2012
Concierge Conference Centers
New York, NY



Members In Attendance: Michele Buslik, Ed Gaffney, Nancy Gallagher, Janet Gallent, Hadassa Gerber, Tanya Giles, Pat Liguori, Billy McDowell, Michael Nathanson, Dave Poltrack, Beth Rockwood, Ceril Shagrin, Ira Sussman, Emily Vanides, Judy Vogel

Present by Phone: Bob Ivins, Dan Murphy, Keenan Pendergrass, Kate Sirkin, Jack Wakshlag, Sharon Warden

Absent: Brad Adgate, JoAnn Burns, Alex Corteselli, Paul Donato, George Ivie, Mark Kaline, Greg Ross, Matt Ross, Robin Thomas

Also Attending: Daryl Battaglia, Mike Bloxham, Tom Campo, Bruce Hoynoski (phone) Will Jackson, Dave Marans (by phone), Bill Moulton, Phil Napoli, Shelley Drasal (by phone), and Richard Zackon.

Ceril Shagrin called the meeting to order at 9am. Members were asked to share their most pressing research questions and problems. Responses included: changes in video consumption, how the pieces fit together, social media, the efficacy of conventional TV, big data and its management, cross-platform evaluation and budgeting, economic performance, the new fall season, quick and accurate measurement from personal devices, hybrid measurement, identifying practices which are no longer valid, putting new services into perspective, market mix modeling and maintaining research quality.

Three guest speakers presented their thoughts on the direction of video media. They were Mike Bloxham (Media Behavior Institute), Will Jackson (Intel Media) and Professor Philip Napoli of Fordham University. Their presentations are available to CRE members at the CRE website.

CRE Mission

The Council took one of its occasional reviews of its charter and Richard invited a discussion on whether the members felt the CRE was on the right track. Beth Rockwood raised the issue of methodological research, which is at the heart of the CRE mission and its relationship to a project like the Social Media study. Ceril Shagrin expressed that knowing how to measure a new-media usage like this is part of the charter. Dave Poltrack noted that the Video Consumer Mapping Study was not methodological but was important to establish what was occurring -- learning about behavior is important, as is testing what our measurement systems tell us. Michael Nathanson said the CRE should step in when there are measurement controversies. Nancy Gallagher noted the learning that occurs regards things that were not identified as part of the study. The appearance of a large number of non-TV households in the Dallas study is an example. Pat Liguori remarked that you need to understand a behavior to find the best way to measure it. Bill Moulton distinguished the research the CRE conducts, what it learns, what Nielsen learns and what Nielsen does as a result. He felt Nielsen could be learning more from the work of the CRE. He offered to work with CRE to raise the profile within Nielsen. Nancy Gallagher suggested involving Nielsen's Emerging Leaders in this process. Mike Bloxham proposed including in project timelines thinking about implications for Nielsen. Ceril stressed the importance of involving Nielsen in the process. Tom Zingas commented that the CRE ought generally promote its research more in the industry.

Steering Committee

Richard shared that Greg Ross of P&G has a new assignment in China and has stepped down from the CRE and his role as Chair of the Steering Committee. He will be replaced at the December meeting.

Five new CRE members were proposed by the Steering Committee: Cheryl Brink (Scripps Networks), Laura Cowan (Lin), Jed Meyer (Annalect), Bryon Schafer (Hulu), and Stacey Schulman (TVB). All five were voted into CRE membership.

Treasurer Report

Michael Nathanson reported that Nielsen's finance team was now providing timely estimates of expenditures and that CRE finances

were in good shape. We have some \$600,000 available for future research studies in 2012.

Michele Buslik noted the need for a hand microphone at meetings.

Measurement Science

There was no report from Measurement Science. Bruce Hoynoski was on the phone but in response mode only.

Ceril Shagrin requested a webinar for CRE from Measurement Science in advance of the December CRE meeting and preferably before the October 29 Client meeting. Michele asked that it include at least one slide on Nielsen's response to learnings from CRE research.

Committee Reports

Sample Quality

Ceril Shagrin reviewed the purpose of the present Sample Quality research and reported the project was proceeding on time and on budget. She promised to share with CRE some initial findings on viewing from a small sample of non-TV Households.

Social Media

Beth Rockwood reported all of the work on the Social Media project is out of the field and all is going well. There was a full day project review in July with the various research teams and a timetable for the future is in place. Over 1700 participants were included in the quant study, 90% having completed all seven days. Almost 200 participants were recorded in the mobile ethnographies. One of the bigger challenges was defining "Super-connectors," the heavy users of social media. A meeting on November 15 is planned to review initial results. All CRE members are invited.

Return Path Measurement

Pat Liguori reported she has a draft of One Touch Intelligence's report but it requires further work and so has not yet been

released to her committee. This first stage gives a state of the overview of devices by MSO, Telco and DBS. The second stage will give details by DMA. She shared some sample data.

Jack Wakshlag asked how OTI handles data from apartment complexes with multiple dwelling units. Pat said she would find out. Pat said she would schedule a CRE webinar for October on the OTI report.

Media Consumption and Engagement

Emily Vanides represented the committee. She referenced a CRE webinar held September 10 on a proposed study by Chadwick Martin Bailey on use of mobile media. There is a quantitative and a qualitative piece to the study. Data will be gathered via mobile apps and is projected to cost \$558,600 which includes a Spanish-language component. We look to field in 1st Quarter 2013. Total quantitative sample size is 3200 which includes two control groups.

A motion to approve the project was made and seconded and the CRE approved the funds.

Digital Research

Michele Buslik represented the committee and discussed a proposal to conduct a research review focusing on internet-delivered video, namely "in-view" or "viewable" impressions and measurement of and on video-capable devices. The project would be a research review conducted by a knowledgeable industry researcher. The review would help guide the committee's future research agenda. Michele asked for \$25,000 in funding and suggestions for a possible research provider.

The motion for funding was made and seconded and the Council voted the funds.

Local Measurement

Billy McDowell reviewed the work of his committee regarding increases in sampling error in local diary markets. His committee is requesting \$40,000. A motion was made and seconded and the Council voted the funds.

Bruce Hoynoski reviewed Nielsen's testing of Code Reader and hybrid measurement using return path data. Neither of these measures will contribute to national data.

The committee is looking at preparing a series of questions on these efforts to get formal answers from Nielsen to aid client understanding. There may be coordination with MRC, respecting confidentiality requirements of the MRC.

ROI

Dave Poltrack presented a proposal prepared by Sequent Partners which would consider the principle current methods of estimating advertising ROI, a SWOT analysis of those methods, an articulation of best practices and a set of priorities for improvement. Companies offering models would be interviewed. The proposal will be shared with the Council. The process will take about three months and Dave suggested reaching out to the ANA to participate. Pat Liguori suggested including agency auditors.

A motion was made and seconded to allocate up to \$100,000 pending final approval by the ROI committee of the proposal.

Insights to Practice

Nancy Gallaher noted that her committee has a good opportunity in 1st Quarter 2013 with the release of findings from the Sample Quality and Social Media studies. She sees it at the heart of a good collaborative relationship with Nielsen. Nancy also spoke to how the other research committees have taken up the common set of questions Insights to Practice posed.

The next steps regarding the Digital Publishers survey was left uncertain.

Communications

Emily Vanides shared how our Linked-In sign-ups grew to 217 from 162 and described aspects of the community. She discussed how the group might be a platform to support research accuracy in the press. Shari Brill will be working on this effort.

Tom Campo updated the Council on recent press releases, guest columns and the CRE quarterly newsletter. Emily spoke to conducting a second client survey and the success of the Meet the CRE webinars.

Emily suggested we reach out to Joe Mandese and invite him to attend our next meeting. She also pointed to the major studies which are due to be released in early 2013 and the need to plan for that.

Education

Sharon Warden reported that Brian Trembl of Nielsen is now working with the committee. She noted a successful event that Time Warner, working with the Broadcast Education Association, held in reaching out to academics in July which could be a model for CRE. The internship listings on the website will be provided again in 2013 and consideration is being given to a speaker's bureau for industry professionals to engage college students. Tom Ziangas spoke to the value of speaking to students about research.

New Business

Michele Buslik expressed appreciation for what was presented and discussed at the meeting but was disappointed not to have heard more from Nielsen. Members indicated general agreement with Michele. Ceril echoed the importance of hearing about developments at Nielsen. Daryl Battaglia promised to communicate the message to Nielsen and change the situation going forward.

Members assessed the invitation of guest speakers as successful. Hadassa Gerber requested more interaction among members about possible research projects. Beth Rockwood felt the guest speakers might have been well used to stimulate Council thinking. Michael Nathanson suggested that members articulate their personal challenges with more detail to help identify issues. Michael agreed to give a "Wall Street" look at a future meeting. Tanya Giles expressed her appreciation at joining the CRE.

Adjournment

The meeting was adjourned at 4:15pm.