

Minutes from Quarterly CRE Meeting March 10, 2011

1 p.m. ET
730 Third Avenue
New York, New York



In Attendance: Joanne Burns, Michele Buslik, Alex Corteselli, Laura Cowan, Colleen Fahey Rush, Ed Gaffney, Nancy Gallagher, Hadassa Gerber, Mike Hess, Pat Liguori, Dan Murphy, Liz Nash, Michael Nathanson, Mike Pardee, David Poltrack, Lisa Quan, Beth Rockwood, Matt Ross, Ceril Shagrin, Noreen Simmons, Kate Sirkin, Emily Vanides.

Present by Phone: Michael Orgera, Jessica Pantanini, Greg Ross, Bob Ivins, Mark Kaline, Keenan Pendergrass, Beth Uyenco, Jack Wakshlag, Billy McDowell

Absent: Paul Donato, George Ivie, Brad Adgate, Michael Link, Robin Thomas

Chairman, Mike Hess called the meeting to order at by commenting that there was a full agenda. He thanked Nielsen and everyone involved for planning lunch and commented that it was nice to mix with his colleagues before the meeting. Mike also commented on his excitement of the incredible energy and progress that the Chair and the Committee Members had in the committee meetings that he was recently able to attend.

Steering Committee

Problems with the phone connections caused a delay of the meeting.

Greg Ross, Chair announced that the Steering Committee was recommending two candidates for membership to the CRE- Janet Gallent from NBC and Laura Cowan from Riester who is currently a Bridge Member on the council.

Comcast/NBC currently holds two seats on the council so the Steering Committee proposed that Janet Gallent and Bob Ivins share a seat on the council.

The council voted to accept both Laura Cowan and Janet Gallent to the council with Janet Gallent and Bob Ivins sharing a seat.

With Nielsen Client meeting announced for June 21-22, the CRE quarterly meeting will be moved from June 23 in New York to June 20 in Orlando. It was then decided that the September meeting will be moved from September 20 to September 22. It will be an all-day meeting.

At Richard Zackon's request, the Steering Committee will conduct a performance evaluation of the CRE facilitator using the 2010 Goals as a basis and seeking input from the whole Council. Those goals were:

1. Effective reporting out of CRE research findings
2. Design, fund and manage new Research projects
3. Successful incorporation by Nielsen of CRE findings
4. Design and execute PR Plan for CRE
5. Further develop content and functionality of CRE website presence
6. Monthly webinar series for CRE and clients
7. Expanding participation by non-CRE Nielsen clients, especially on Committees
8. Reach out and engage other industry groups
9. Provide members with expanded opportunities for quality networking with one another

10. Increase administrative and communication support for committees
11. Bring more orderly process to CRE finances
12. Maintain standards of excellence for future CRE research and dialogue

After the review Mike Hess will discuss the results with Richard.

With the departure of Susan Cuccinello from the CRE, there is an open seat on the Steering Committee. Bob Ivins submitted his name and he and the ten current members were voted on as a slate. The Council approved the eleven members.

Jessica Pantanini was re-elected as Secretary.

Measurement Science Report

Mainak Mazumdar of Nielsen delivered a status report. At the direction of Nielsen there was no record.

Committee Updates

The Committee Reports were given as a review of research agendas for each of the committees.

Media Consumption and Engagement

Laura Cowan thanked Jack and Emily for their assistance as acting Chairs for the MCE Committee.

Laura addressed the five questions of the research agenda are currently being reviewed with BIA/Kelsey.

- What drives the choice of screen for the consumer? What factors distinguish screen experience?
- How does viewing vary with chosen screen?
- Vocabulary/methodology for understanding viewing styles (based on location, presence of other media and individuals, and simultaneous life activities).
- What patterns are there regarding context of use: screen substitution, cannibalization of particular formats? How do viewers see their media landscape?
- What methodologies are best to get at these uses?

Also on the agenda are out of home/at work and the impact of pod position and number of spots.

Additional items were discussed: Multiple screen usage, customized advertising, when a consumer shares content, early adoption of new technologies, engagement, content variables and accurately measuring behavior of Hispanic, African American, and Asian viewers in any new research.

Rick Ducey and Pat Phalen from BIA/Kelsey presented an update on the research they are conducted. The results will be shared at the ARF June event AM 6.0. CRE will see the presentation in advance.

Social Media

Beth Rockwood shared the following questions at the core of her committee's agenda:

- What is the relationship between social media and video? a. Simultaneous usage b. Impact on subsequent viewing
- What are the significant social media audience segments?
- How is the experience of viewing affected by social media?
- What are the key audience metrics unique to social media and how can they be connected?
- How does word of mouth differ online and offline?
- What are the network level effects of social media?

- What is the influence of social media?

Beth mentioned that Michael Link had agreed to help look into the potential of using the 9000 homes that are a part of the TV-PC panel to analyze the interaction between social media usage and viewing.

Brad Smallwood of Facebook recently joined the committee which holds monthly informational calls to which CRE members are invited.

Topics raised included TV versus video within social media, short forms versus long forms, branded content, what has something go viral, one-to-one versus one-to-many social media and the impact of different devices.

Digital Research

Dan Murphy reviewed the committee's research agenda:

- How accurate are publisher data sets which can be used for hybrid audience measurement?
- How accurate are current competitive ad spend estimates in the digital marketplace and how can they be improved?
- How valid and reliable are current online ad effectiveness metrics?
- What issues exist as it pertains to Digital Surveys?
- Are there distinct issues of mobile measurement?

The issue of out of home was raised.

The Digital Committee is proposing that the CRE allocate \$70,000 for Ernst and Young to conduct a survey of Publisher data collection and maintenance practices. A concern was raised about the confidentiality of the information given E&Y's close involvement through the MRC in the industry. Richard Zackon agreed to raise the issue with E&Y.

The proposal was approved by the Council. The issue now is securing cooperation from publishers.

Dan closed by discussing the IAB initiative, Making Measurement Make Sense.

Universe Estimates

Nancy Gallagher spoke to the challenge of tracking devices as new ones continue to emerge. She also noted the larger than expected number of non-TV households in the Dallas-Ft. Worth study. The committee's agenda asks:

- What and how many devices are out there (replicate 2009 study in a low and a high tech market)
- Where devices are used to consume video
- Changes in behavior since acquiring devices
- Tracking and analyzing non TV and over the air only HH's

That Nielsen does not capture reasons for non-TV HH or the dynamics of this status was discussed. More information should be captured. There were concerns about possible over-counting of Pay HH and contradictory industry statistics on non-TV HH. It was also noted that a TV in the HH does not mean all persons use it.

Set-Top Box

Pat Liguori reviewed the committee's research agenda:

- How similar or different are the characteristics of the STB HHs used to measure a DMA (or portion thereof) to that of the DMA's (or corresponding area's) UEs? To the Nielsen sample used within the same DMA or geographic area?
- Can viewing data from over-the-air HHs and non-STB Cable HHs be used to supplement STB tuning data instead of modeling for these types of HHs?
- Are there standards that should be in place in order for STB data to be used as a currency? If so, what are they?
- Can the accuracy of STB tuning be measured, and if so, how does it compare with competitive measurement services?
- What types of bias are inherent in STB measurement, and to what, if any extent, are the data impacted by these biases?
- What, if any, is the impact of combining data from multiple STB providers, each having different measurement and processing methodologies?

Committee members expressed concerns that data Nielsen was expected to make available to the committee's statistical consultant had not yet been forthcoming. Pat shared an email from Nielsen in relation to the hybrid testing in which they are combining set top boxes in a diary market, a set meter market and an LPM market. The email concerned Nielsen's plans for sharing information with its clients.

Non Response

Ceril Shagrin shared that she has reconstituted expanded her committee with new members. The agenda the group is facing includes:

- What are the non-response implications of address based sampling? What are cell phone implications? What are the minority implications?
- Are there changes to recruiting practices which could lower the impact of non-response?
- What is the impact on non-response bias on digital measurement?
- What is the impact of faulting on nonresponse?
- What are further learnings which can be achieved from a deeper dive into data already collected?

Ceril acknowledged a lack of progress on a final report of the major study which could be published.

Local Measurement

Billy McDowell noted that there are some 150 local diary markets not accredited by the MRC. Sample size and representativeness of certain population groups are issues leading to great volatility. A new committee was formed to work with Nielsen to address these concerns. Set top box data and data modeling may improve the situation.

He put forth the following agenda:

- How can we improve the diary instrument and collect a more representative sample?
- How can we use this information more responsibly as an industry?
- How can we stimulate innovation in collecting audience information at the local level?

Billy presented what Nielsen is currently working on in regard to Local Measurement. These include the diary instrument itself, the use of set-top box and modeling data from electronic measured markets.

The three areas of discussion currently being talked about within the Local Measurement Committee are:

1. How can we improve the diary instrument and then collect a more representative sample?
2. How can we use this information more responsibly as an industry?
3. How can we stimulate innovation in the area of new technologies and new methodologies in collecting audience information at the local level?

Michele Buslik asked if the committee was aware of what Nielsen was doing with Media Link and the data stream. Laura Cowan suggested learning from the radio diary. Jack Wakshlag proposed some of the committees might work together

Insights to Practice

Richard announced that Pat Liguori has temporarily stepped in and is Chairing this committee since Susan Cuccinello is no longer on the Council.

Pat Liguori said that the Q&A resulting from the learnings of the Video Consumer Mapping study would be complete within six weeks, subject to final editing.

The Media related Universe Estimates Committee suggestions have been made to Nielsen which they are taking under advisement though there's been little formal discussion or movement with them.

Similarly there's been no recent activity for Non-response on the suggested next steps that had been previously considered. This is also true for Set Top Box.

Pat declined to continue chairing Insights to Practice. Laura Cowan agreed to chair the committee. The Council endorsed Laura as Chair.

Education

Alex Corteselli reiterated the two goals of the Committee: to encourage the next generation of researchers and to help those already in the profession further their careers through training.

Promoting internships is a logical first step and Alex asked CRE members to offer internships at their companies beginning in Summer 2011. Interns need either to be paid or receive academic credit. The CRE website would be the vehicle to communicate the program. Existing internship programs are acceptable.

Laura Cowan suggested reaching out to those on CRE committees but not on the CRE.

Down the road the committee may help teachers at colleges and universities who are teaching these kids making sure they're up to date in their methods and understanding of what the industry is.

Communications

Jessica Pantanini reported that the Communications Committee has given Tom Campo a positive evaluation and recommended that the CRE continue working with Tom for the rest of this year. A motion was made and seconded and the Council approved at a rate of \$3000 per month.

Tom spoke to the importance of communicating the independence of CRE from Nielsen.

He also provided some statistics of press coverage of CRE and website usage. Results from the CRE client survey will be used to guide 2011 activities. Raising awareness of CRE is key. A quarterly newsletter is planned.

CRE has been offered monthly space in Radio Business Reports/Television Business Reports. Jack Wakshlag recently by-lined a column. Dan Murphy has one coming up.

We are considering inviting a key editor to at least part of a CRE meeting. Various upcoming industry events were discussed.

Emily Vanides suggested using some Nielsen Buzz metrics listening tools.

CRE Website

Shelley Drasal presented CRE website developments. There is now a password protected member only section. There will be a repository on there for internal council committee documents. Members will be able to communicate and discuss topics with each other and a calendar for future meetings and industry events.

Treasurer Report

Michael Nathanson thanked the Council for voting him back on. He noted that Nielsen is now a public company and the need for greater financial accountability by the CRE. Committees will be looking at quarterly budgeting. The recent agenda-setting is a move in that direction.

New Business

Richard Zackon reported that David Poltrack wanted to initiate a conversation regarding ROI. Ceril Shagrin, Michele Buslik and Ed Gaffney volunteered to join the initial effort.

Richard shared his CRE goals for this year.

1. Research execution
2. Creating a research agenda process
3. Communication with Nielsen clients
4. Impact with Nielsen: Insights to Practice
5. Financial planning and reporting
6. Leverage learning from Client survey
7. Design CRE 2.0
8. Expand public presence
9. Engagement with Nielsen management
10. Bring in new members from key sectors
11. Expand utility of CRE website
12. Internship program with diversity element

Richard also promised to get out an annual report for 2010 to the Steering Committee for distribution.

Emily Vanides proposed a rule change such that a Committee chair remains in place as Bridge member between quarterly meetings. This will allow for continuity. This will be reviewed by the Steering Committee.

Adjournment

Mike Hess recognized a motion for adjournment and the meeting was adjourned at 4:40pm.

