



# Quarterly Meeting

## March 8, 2012

# Opening

Ceril Shagrin, CRE Chair



# Steering Committee

Greg Ross, Chair



# Treasurer Report

Michael Nathanson



# Measurement Science Report

Paul Donato



# Consumer Technology Update

Scott Brown



# Sample Quality/Cross Committee Research

Ceril Shagrin, Chair



# Goals

- Dimension Non Response bias in Address Based Samples
- Learn whether expanded media related equipment ownership can be obtained from diary samples
- Learn how return path data can improve diary measurement. Does Nielsen proposed methodology account for non return path sets/homes and lack of demographics.
- Learn how much TV program viewing is done in currently defined non TV homes and what devices are being used





# Research Plan

- Three local markets
  - Dallas – LPM
  - Albuquerque- Santa Fe NM – metered market
  - Paducah, KY-Cape Girardeau, MO- Harrisburg, IL. diary
- Non TV homes will be sent a modified diary
- All homes will be sent a questionnaire
  - Include questions from media related UE research
  - General viewing questions similar to earlier non response research
  - Homes not responding will be contacted by phone and in person if necessary



# Comparisons

- LPM Market: diary to LPM; return path adjusted to LPM; compare demos and media related device ownership
- Metered Market: compare diary only, diary adjusted by meters, diary adjusted by return path data
- Diary Market: compare diary only and diary adjusted by return path data
- Compare characteristics and cell phone penetration in diary sample and metered sample for same market
- Compare differences in viewing by responders and non responders from ABS sample with differences found in prior research based on telephone sample.



# Current Status

- On target to use May measurement
- New diary for “non TV homes” designed
- Follow up questionnaire designed and reviewed by committee. Some minor changes being made
- Expect to have findings to share fourth quarter
- Final costs should be on budget



# Social Media

Beth Rockwood, Chair



# \* Viewing In The Social Media Age

Social Media Committee Update March 2012



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- \* Primary quant research study design underway

- \* Review revised proposal including additional elements

  - Maintain original objectives

  - Reduce Pricing

- \* Opportunity for additional learning incorporating Bluefin data and analysis

- \* Seek CRE approval for additional elements, incremental cost \$235K



\* **Overview**

- The research will bring together a unique mix of **primary quantitative research, social media monitoring, advanced statistical analysis and two types of ethnography** to identify broad trends and a finer-grained cohort analysis.
  - ✓ *This fulfills the CRE's goal of providing "the Nielsen client community an avenue for undertaking research projects no one company could undertake on its own."*
- The outcomes will both address the key questions about the **relationship between social media and TV**, while also providing "research on research" about the contributions of each of the varying research methods being deployed in this study
  - ✓ *Consistent with the CRE's mission "to advance the knowledge and practice of methodological research on audience measurement."*

## \* Background & Objectives







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# Social Media and TV



Buzz data source:  
150 million+  
social media sites  
N=150 TV shows

- Measure all contact points with primetime / late news TV to understand impact of social and other, whether paid, owned or earned

Quantitative Survey  
+ Check ins

*“When do social contacts occur?”*  
*“What is their relationship to different behaviors and to each other?”*  
 N=1,500

- Buzz & Behavioral Analytics**
- Identify different speakers to add context and richness to social occasions
  - Understand role of “super connectors” relative to other users

- Capture real-time behaviors: time spent, concurrent media use
- Uncover attitudes, motivations behind what people say vs. what they actually do — and why.

Ethnography

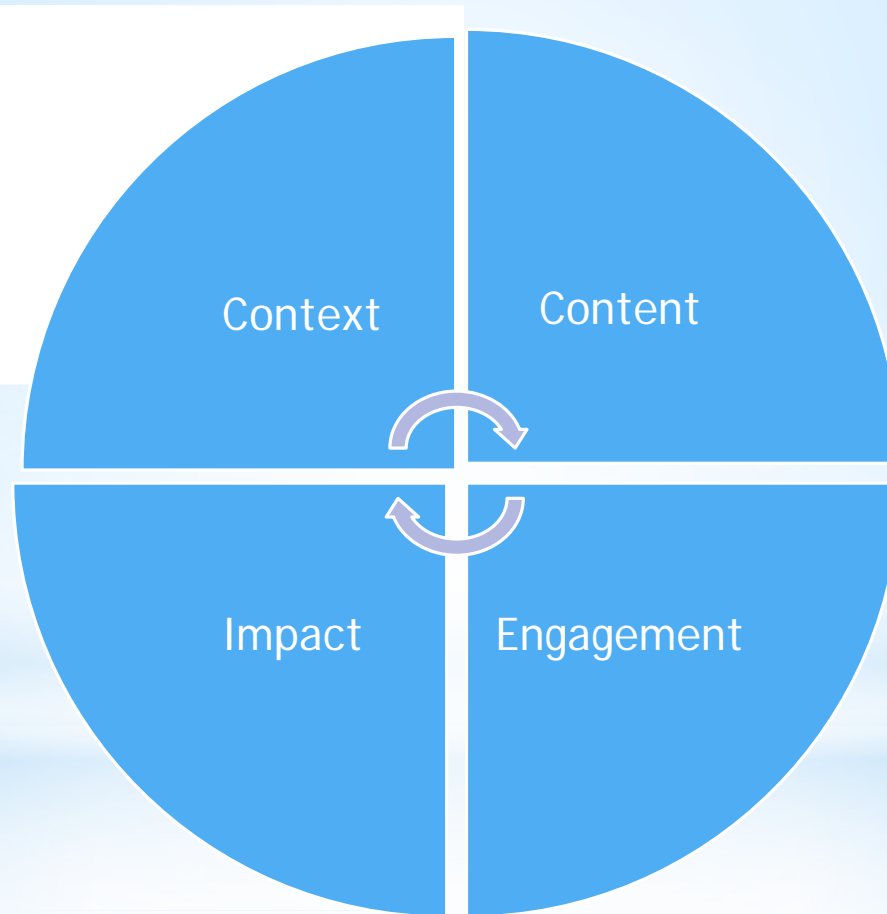
Observe triggers of activity, needs & methods used; probe into ecosystems for roles, influences  
 N=200



**\* How does social media interact with primetime / late news television viewing in the context of other media (paid, owned and earned)?**



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***How do active social media users engage with social media?***

# \* Revised Recommendation Additional Elements

Nielsen and NM Incite will analyze online consumer conversations (Buzz Sweep).

Insights from this analysis will be combined with the quantitative survey findings to inform the two-wave ethnographic studies from Life360.

- \* NM Incite analysis will provide a deeper understanding of online discussion surrounding TV.
- \* Develop metrics that will provide a quantitative and qualitative understanding around TV conversation.
- \* Provide insight on how conversation is similar and differs across program genre.
- \* Reveal how conversation differs across platforms (i.e. Twitter versus blogs).
- \* Provide insight on the seasonality of online discussion and an understanding of viewer engagement with a program prior to the premiere, over the course of the season, and after the finale.
- \* Verbatims of commentary will add color to the analysis and highlight how viewers are engaging in online discussion.

\* **Buzz Sweep**



- \* **Smartphone:** Analyze respondents' "in-the-moment" decisions around social media, TV and technology use over a 10-day period, unobtrusively
  - \* - Quali-quant analysis of daily media engagement + routines offering context for behavior and motivations: Time of Day and Day of Week tracks and correlations
  - \* - Understand how, when and where cross-platform activities take place
  - \* - What motivates engagement? Primary vs. secondary focus? Satisfaction with choices, moods, etc.
- \* **Video:** Qualitative analysis offers richest opportunity yet to get at the "why" of respondent engagement, in their own words. Analysis of content, tone and facts; actual vs. claimed behavior. Respondents "show & tell" what they're doing and *how* they use social before, during or after TV engagement.



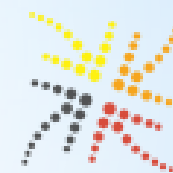
- \* Bluefin Labs has begun discussions with us to provide data to augment our study
- \* Early phases of discussion, shows promise for additional learning, points of comparison
- \* This will be at no cost to the CRE

\* **Bluefin Labs**





\*Thank you



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# Local Measurement

Billy McDowell, Chair



# Committee Members

Billy McDowell	Raycom Media, Inc.	Chair
Pat Liguori	ABC Television Stations	
Keenan Pendergrass	WFTV Orlando	
Matt Ross	Hearst Television	
Bruce Hoynoski	Nielsen	
Bob Ivins	Comcast	
Joanne Burns	20 <sup>th</sup> Television	
Sharon Warden	NAB	
Ceril Shagrin	Univision	
Lisa Quan	Magna Global	
Janice Finkel-Greene	Magna Global	
John McMorrow	HRP	
Maggie Strickland	CW33	
Richard Zackon	Facilitator	





1<sup>st</sup> Initiative – employed Susan Weiss to assist with data analysis.

- Five May sweep periods spanning **10 years: 2001, 2003, 2005, 2007 and 2009**

- 26,040 data points** (average quarter hours); 5,208 per sweep

- Households, Persons 18-34, 18-49, 25-54

- Total day, Day, Early, Early AM, Late Fringe, Primetime, Post Prime

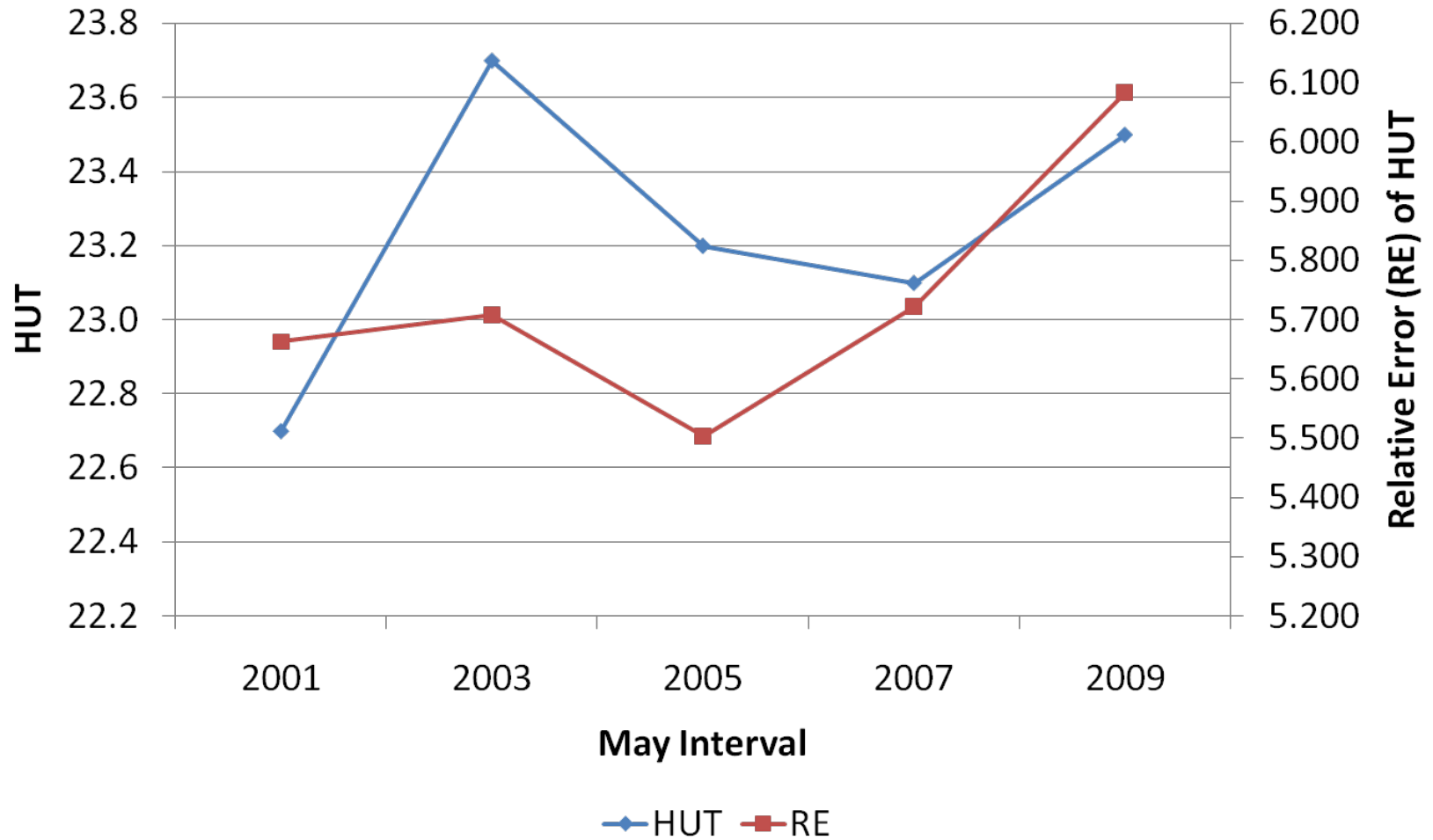
- ABC, CBS, FOX, NBC, strongest independent

- 31 markets, representative of large, medium and small markets, geographically dispersed

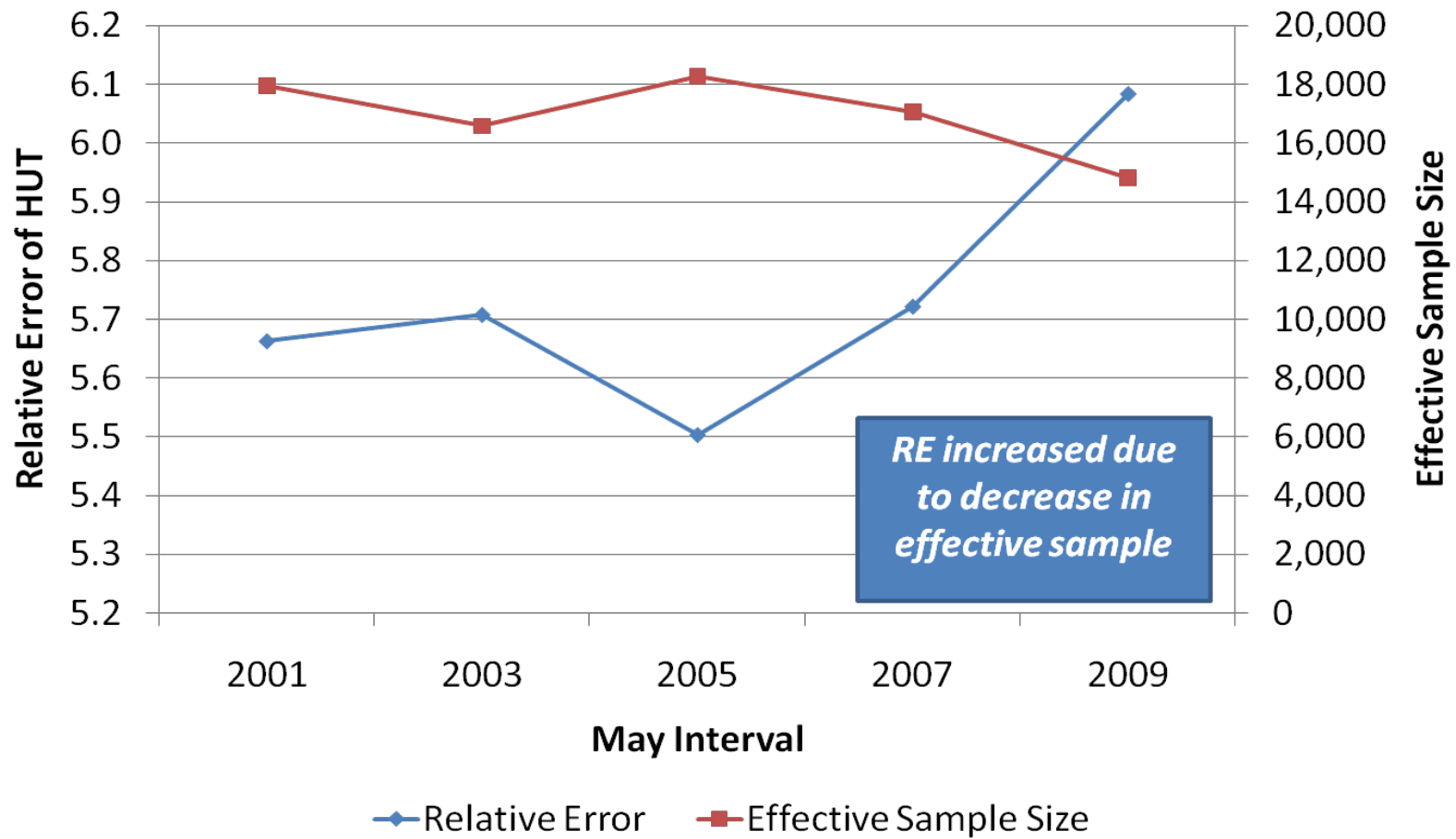
- Ratings, standard error and relative error estimates*

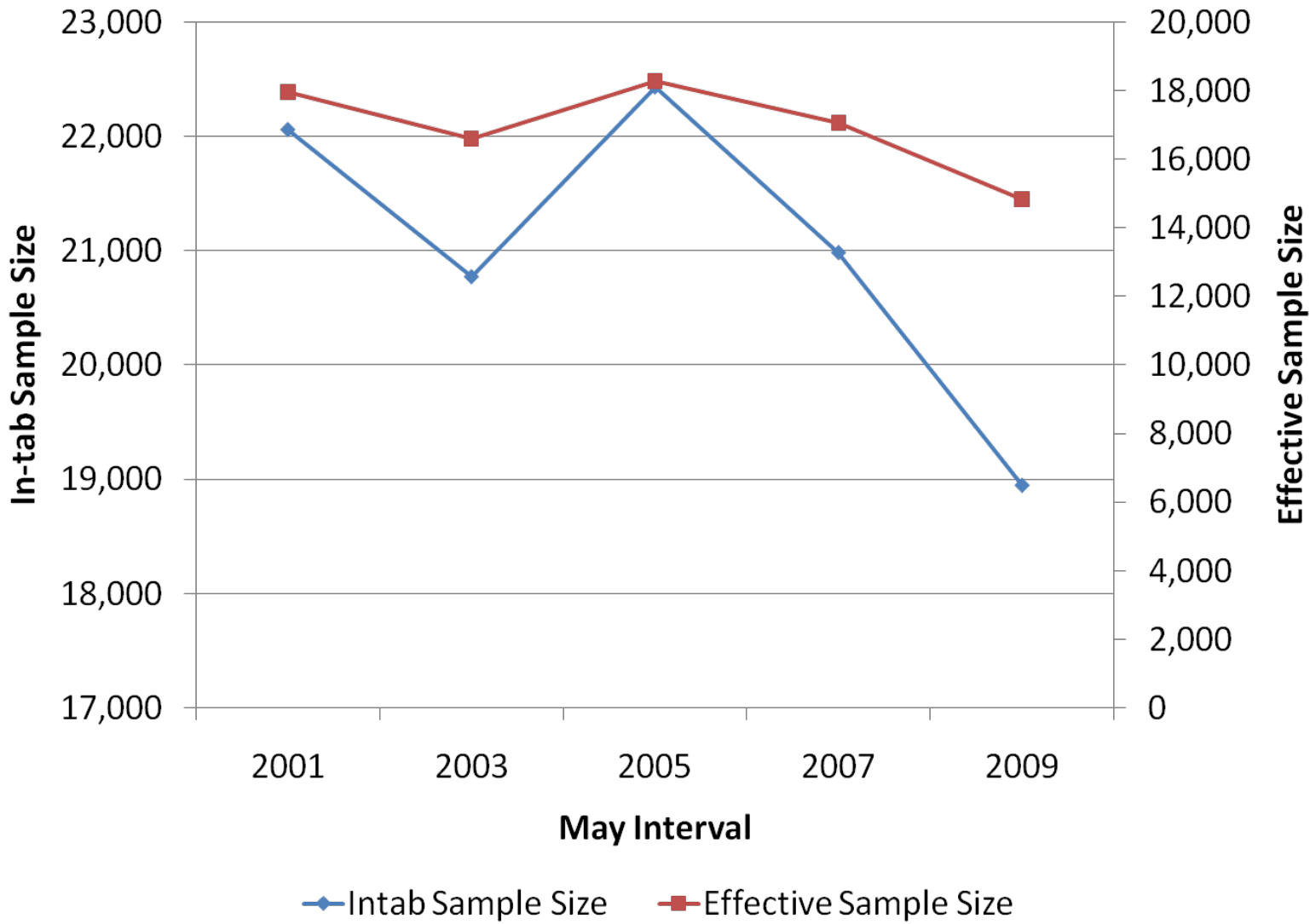


## Monday-Sunday 24 Hours (Average Across All Markets)



## Monday-Sunday 24 Hours (Average Across All Markets)





May	HUT							Effective Sample Size	In-tab Sample Size	Ratio	Relative Error						
	M-Su 6A-6A	M-F 6A-7A	M-F 7A-4P	M-F 6P-7P	M-F 8P-11P	M-F 11P-11:30P	M-F 11:30P-1A				M-Su 6A-6A	M-F 6A-7A	M-F 7A-4P	M-F 6P-7P	M-F 8P-11P	M-F 11P-11:30P	M-F 11:30P-1A
<b>2001</b>	22.7	18.0	21.4	40.5	53.9	42.4	20.2	17,952	22,064	0.814	5.663	6.553	5.836	3.915	2.934	3.915	6.148
<b>2003</b>	23.7	19.4	22.4	42.5	55.1	42.2	20.9	16,594	20,775	0.799	5.708	6.515	5.870	3.874	2.942	4.062	6.240
<b>2005</b>	23.2	20.1	21.8	39.7	52.6	40.3	20.4	18,279	22,438	0.815	5.504	6.050	5.666	3.905	2.957	4.028	5.996
<b>2007</b>	23.1	20.4	21.5	39.3	54.2	40.2	19.8	17,066	20,987	0.813	5.722	6.247	5.942	4.084	2.968	4.177	6.313
<b>2009</b>	23.5	20.8	21.8	39.3	53.9	38.8	19.6	14,829	18,947	0.783	6.083	6.630	6.295	4.380	3.213	4.609	6.791



Sample sizes and controlling weighting keys to reducing standard error.

*Nielsen is putting together information regarding cost and necessary increases in sample sizes to significantly reduce standard error.*



2<sup>nd</sup> Initiative –

**Market/Station by Brand** – examining the variability of posting advertising schedules.

*Nielsen has promised data on, or before, March 16<sup>th</sup>.*



Thank You!





# Digital

Dan Murphy, Chair



# Universe Estimates

Nancy Gallagher



# Set Top Box

Pat Liguori, Chair



# Set Top Box Committee Report

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## 2012 Activities

### 1. NIELSEN: January 17, 2012 Local Market "Hybrid" STB Measurement Update

#### Summary:

- New Information: Not much! Need more providers and boxes.
- Data: Too early to look at Charter vs DirectTV data
- Validation: in progress
- Rollout: 12 TBD markets reflecting all types of market conditions in second half of 2012; parallel data not for business use
- Code Reader 2: Collects watermarks and signatures; testing scheduled to begin Feb' 12; unlike CRv.1, v.2 is unable to determine set on/off, so will use assumptions based on presence of codes and signatures; deployment in all types of HHs (OTA, Cable, Satco, etc.)
- Weighting and Factoring: Diary Markets Only
- New Model: In development for LPM and Set Meter markets; persons imputation
- STB + Code Reader + PM: Reduced Total Survey Error
- Reminder: STB provides insights within the UE it's representing!



# Set Top Box Committee Report

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## 2012 Activities

### 2. KANTAR: February 1, 2012 Review RPD Service

- STB vs RPD: "Return Path Data" is a more accurate and complete description of the type of data; consider renaming CRE STB Committee
- Business Environment: new technologies, demand for greater efficiency and financial accountability
- RPD Utility: Commercial ratings, ad avoidance, emerging and sub-channel measurement, T-Commerce and addressable advertising, promotion evaluations, integration with other databases (auto, retail, etc.)
- Sample: Charter (LA) and DirecTV (national); MSOs have tuning data on authenticated mobile devices as well as non-cable HHs that subscribe to MSO's broadband service
- Bottom line: a very informative and positive session!



# Set Top Box Committee Report

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## 2012 Activities

### 3. iLOOK: April 2012 Introduction to "Cloud" Technology

- Agenda: What is Cloud technology? Can tuning be captured and reported with same granularity and metrics as are currently available with STBs?
- NDA: Reviewed by ABC Legal and distributed to STB committee for review and signature
- Meeting: date TBA

### 4. COMMITTEE NAME

- Reason: To more accurately and completely reflect the type of measurement upon which the committee is focused.
- Response: general agreement that change is in order
- Action: solicit input and discuss. Names already suggested are:

Advanced Metrics; Evolving Metrics; New Metrics; Alternative Metrics;  
Return Path Data.



# Set Top Box Committee Report

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## 2012 Activities

“I read the news today...”

### Google looking to unload Motorola's TV set-top box business

By CLAIRE ATKINSON NY Post

*Last Updated:* 8:43 AM, March 7, 2012

EXCLUSIVE

This just in: The TV set-top box is on its deathbed.

Google is looking to unload the set-top box business it will inherit from Motorola Mobility even before it closes on the \$12.5 billion acquisition, The Post has learned.

### 2012 marks the death of the set-top box

By [RBR-TVBR](#) on Feb, 28 2012

Despite Cisco CEO John Chambers' statements to the contrary, cable and satellite television providers want to deliver programming and Internet-based content to their subscribers without relying on the ubiquitous set-top box. In fact, some are already implementing technologies to help them at least reduce the number of set-top boxes they must install in subscribers' homes. 2012 does not mark the evolution of the set-top box, it marks the beginning of the end.

### TV Prediction: No More Cable TV Set-Tops By 2015

By Swanni TV Predictions.com

Washington, D.C. (February 29, 2012)

“However, I predict that the cable TV set-top will be phased out by the year 2015.”



# Set Top Box Committee Report

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## 2012 Activities

### 5. Proposed Project

#### Cloud-based Content Delivery: Can It Be Measured?

*The goal of the committee is to conduct a comprehensive examination of the impact that cloud technology might have on the availability and use of RPD for audience measurement.*

Specifically, the committee seeks proposals to review what audience measurement capabilities exist for cloud-delivered content. This initial study should:

- Identify and describe current vendor practices of collecting, processing and reporting tuning to video content delivered via the cloud;
- Educate the Nielsen client community and the broader media and research industries about what metrics are and are not available for cloud-delivered content;
- Identify important methodological issues regarding the collection and application of audience data derived from cloud technology;
- Map key issues for the industries' ongoing review, tracking and analysis regarding the viability of cloud-based data as a dynamic measurement tool.

Estimated budget: \$80,000.





# Set Top Box Committee Report

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Thank you!



# Media Consumption and Engagement

JoAnne Burns



# ROI

Dave Poltrack



# Online Campaign Ratings Update

Jessica Hogue



# Insights to Practice

Nancy Gallagher, Chair



# Communications

Emily Vanides, Chair

Tom Campo, Public Relations



# Social Network Initiative

- Goals of CRE's social network initiative
  - Increase awareness and brand identity of the CRE
  - Further establish the CRE as a thought leader in the industry
  - Promote our work and initiatives
  - Increase traffic to our web site
  - Inspire membership and participation in the Council and our Committees





- LinkedIn received unanimous endorsement from the Committee
  - Best to reach targets of researchers, trade organizations, press, students
  - If set up as a group, can interact with followers, post links, like/share, etc.
- Communications Committee requests of the Council and members
  - Follow our group (!!!): The Council For Research Excellence
  - Share suggestions on topics, articles to post
  - Approve funding for a Social Network Research specialist
    - Responsible for maintaining group, pushing out articles, responding to posts in a timely manner – WITH THE COMMITTEE'S GUIDANCE AND APPROVAL



**Requesting Council approval of \$10,000 for first 90 days; will evaluate needs after initial review period**



# 2<sup>nd</sup> Edition of CRE Quarterly Newsletter

- Distributed in January
  - Included new feature: Q&A with CRE members
  - Once again sent to Nielsen-client list of some 6,000 recipients
    - Next edition will be sent to opt-in only
- Healthy additional subscriber sign-ups
  - Newsletter is up to 337 subscribers, from 253
    - Webinar-alert subscribers increased to 290, from 214
    - Now 265 sign-ups to receive news releases, up from 194



# Next Edition of CRE Quarterly Newsletter

- More CRE member Q&As
- More committee/activity updates
- Guest “technology” column
- Tentatively scheduled for April release



# Website Enhancements

- CRE Logo Revision
- Link on each Committee page for interested individuals to share interest in joining committee (links to [info@researchexcellence.com](mailto:info@researchexcellence.com))
- Calendar on Members-Only page
  - Easy access to all Committee Meetings
- Updated pictures and bios on Members-Only page (there are currently 7 members without pictures or bios at this time)
- Link added to the home page for Education Committee's Internship program



# First “Meet the CRE” Quarterly Webinar

- Conducted February 13
- Over 30 participants
  - Representing companies including ABC Sales, CBS Stations, Comcast Spotlight, Cox Reps, Univision



# Communication Committee Budget - 2011 Actual and 2012 Estimated

## 2011 Expenses

- \$36,000 PR
- \$72,000 Meetings
- \$2520 Transcription, Doodle, WebEx
- \$66,000 Website
- \$0 Graphic Design
- \$0 Social Media Initiative
- \$176,520 Total

## Projected 2012 Expenses

- \$36,000 PR
- \$64,000 Meetings
- \$6,500 Transcription, Doodle, WebEx
- \$72,000 Website
- \$2000 Graphic Design
- \$25,000 Social Media Initiative
- \$205,500 Total



# Preliminary 2012 Timeline

	Q1	Q2	Q3	Q4
Guest columns in TVBR	X	X	X	X
New-member announcements	X	X	X	X
Quarterly Newsletter	X	X	X	X
Quarterly webinar on CRE	X	X	X	X
Client Research Webinar	Local Measurement		Sample Quality	
Client Research Webinar	Digital		Social Media	
Announcement	Sample Quality			
Announcement	Social media research			
Announcement		Internship		
Announcement	Update on UX			
Mini-summit		Local Measurement		ROI
Other	CRE Logo	Website enhancement		
Other	Social Network Initiative	Accuracy in Press Initiative	Invite Reporter to Meeting	

# Education

Sharon Warden, Chair



# Education

- Offer Internships through CRE members
- Utilizing the CRE website, communicate internship opportunities by providing internship website links of the participating companies
- Remote learning sessions for teachers (help train the trainers)
- Workshops for students, faculty, and industry professionals
- Outreach program focused on college career days
- Help develop training materials perhaps in conjunction with Nielsen U





# Internship Program Update

- Sent CRE members a survey asking for research internship program contacts at your organizations
  - 12 responses
- Sent an even shorter survey to Nielsen client list in February
  - 118 responses
  - Currently have confirmed 15 links



# Faculty Outreach Update

- College Professor Thought Leadership Seminar
  - Media Lab at Time Warner, New York City
  - Mid-July, 2012
  - 35 Professors will be invited through Broadcast Education Association
  - 1 1/2 day seminar demonstrating use of research in all facets of Warner Bros. businesses



# Faculty/Student Outreach Update

- Broadcast Education Association
  - Heather Birks (Executive Director) joined Education Committee
- BEA Annual Conference, Las Vegas
  - Bruce Rosenblum (Warner Bros.) on panel and CBS offered to participate
  - CRE Internship ad in conference program
- Future quarterly BEA meetings/events
  - Joint CRE/BEA media research education mini-seminars for professors and students



# Education Committee and CRE Website

- Internship button at bottom right of home page
  - Links to internship opportunities page
- Page with links has short introductory paragraph, then links vetted by Shelley
- Mission and goals now listed on committee page
  - Also has link to internship opportunities page



# New Business

Ceril Shagrin, CRE Chair



# Adjourn

Richard Zackon, Facilitator

