



LOCAL MEASUREMENT – STATUS TODAY AND FUTURE PERSPECTIVE

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Today's consumer environment

Significant Changes in Consumer Behavior

- > Mobile
- > Cord-Cutting/Virtual MVPDs, etc.
- > Multi-Tasking on Multiple Devices
- > OTT and IP-Enabled Choices
- > Smart Devices

Couple this with –

A limited willingness to participate in research and enhanced focus on privacy.

Quite simply, we've been in the middle of a revolution of increasing measurement complexity.

Today's measurement environment

Currency Measures in a Transitional State in the US;

Re-Defining the Meaning of Currency

Specifically:

- > Developing Larger, More Transactional Data Sources
- > Audience Attribution (Not Just Demographics)
- > Mobile Being Considered Everywhere
- > Emphasizing the Role of Data Quality, Especially in Digital
- > Testing and Improving more Diligently and Faster
- > Measuring Ethnic and Racial Minorities and Young People
- > The Importance of Local – A Difficult Quality Area
- > Expanding/Improving the “Data Understanding” Function

Local television context

Significant challenges with measurement variability, fragmentation (leading to zero-rated periods) and measuring the totality of video consumption by consumers

Unprecedented Changes in Local Measurement Products/Orientations

- > New Meter/SDK Types; Efforts to Enable Video Tracking Across Platforms
- > Return Path Data; Smart TV Data
- > Intermixing Non-Probability Techniques for Data Collection
- > Mixing Meter Types and Panels – PPM/TV Meter
- > Tracking Assets Becoming Critical
- > Demographic Data Modeling Approaches
- > Retirement and Replacement of Legacy Methods – TV Diary Measurement

Local radio context

Significant challenges with measurement variability, measuring young people and measuring ethnic and racial minorities

A limited tool set –

- > The lack of transactional, passive data sets (as can be found for television and digital) to leverage to help solve these issues is a reality. Streaming continues to be small/partial coverage of listening behavior.
- > Conventional research techniques and improvement methods are front and center.

Digital context

Improving and Equalizing Digital Measurement

- > Viewable Impressions
- > Invalid Traffic Detection, Filtration
- > Comparable, Fair Metrics (e.g., Viewing of Digital Video and Traditional TV; Audio Streaming and Traditional Radio, etc.)

New Validated Metrics Ahead for Digital in the US

- > Audience Target-Based versus Gross Ads Served
- > Incorporate Duration Weighting to Equalize Viewing to Advertising and Content Assets as One View of the Data

Metrics Across Media Types May be Valued Differently

Engagement Metrics and Ad Effectiveness Improvements

Overall

Television, Radio and Digital media are inextricably linked – successful practitioners are leveraging these distribution platforms together.

Critical needs:

- > Development of monetization strategies for digital video and audio
- > Legitimizing digital video and audio measurement and ROI; establishing trust
- > Establishing fair, comparable metrics

MRC's charge

Administer accreditation processes fairly and consider these new contexts:

- > Encouraging high product quality and seeking valid, reliable and effective measured metrics and transparency
- > Do not compromise the “MRC Brand”
- > Competently incorporate new approaches into our validation process

The intersection of these contexts with the MRC accreditation processes is challenging and causing friction among all players

CRE's charge

Focus on assisting and improving Nielsen:

- > TV, Audio, Digital, Multi-Media/Cross Media

Revisit critical CRE work to push implications to Nielsen

- > Non-Response bias, local measurement effectiveness, device usage, local measurement, etc.

Propagate research learning to the industry in general

Commonality

CRE and MRC – We have common objectives...

- > CRE develops and promotes new research ideas
- > MRC helps govern putting ideas into practice and ongoing use

These functions are more critical today than ever!

Thank You!

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