



Quarterly Meeting

June 21, 2012

Opening

Ceril Shagrin, CRE Chair



Steering Committee

Greg Ross, Steering Committee Chair



Treasurer Report

Michael Nathanson



Insights to Practice

Nancy Gallagher, Insights to Practice Chair



Insights to Practice

Need to establish for processes



Insights to Practice

- When studies are presented to be voted on by the council, the presentation must contain
 - Problem Statement
 - Why it matters
 - Specific questions
 - Anticipated learnings from research
 - Possible impact on measurement methods
 - Tentative Time Line



Insights to Practice

- Each committee will have a designated Nielsen liaison who will participate in all meetings (occasionally a substitute can act in this role).
 - In addition, if appropriate, a Nielsen LA will attend all meetings/calls



Insights to Practice

- An analysis template including
 - Questions for Nielsen
 - Proposed actions
 - Key Takeaways
 - Areas for further study will be used when presenting findings to the Council and Nielsen



Insights to Practice

- After findings are presented to the Council, a formal Insights to practice session will be held with Nielsen
 - the committees should provide the analysis (including the items on the abovementioned template) to Nielsen at least 3 weeks in advance so that
 - the appropriate Nielsen staff can be present
 - Nielsen can answer questions
 - Proposed actions and areas for further study can be evaluated



Insights to Practice

Any agreed upon actions or further studies will be Incorporated into the client webinar

A public version of the analysis and the Nielsen actions will be posted on the website



Insights to Practice



Sample Quality

Ceril Shagrin, Chair



Social Media Committee

Beth Rockwood, Chair



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 th Television	
Sharon Warden	NAB	
Ceril Shagrin	Univision	
Lisa Quan	Magna Global	
Janice Finkel-Greene	Magna Global	
John McMorro	HRP	
Maggie Strickland	CW33	
David Woolfson	Cable Advertising Bureau	
Ann Casey	Tribune	
Richard Zackon	Facilitator	



CRE Local Measurement

Problem Statement:

- *Local ratings have been showing increased variability in recent years*

Why it matters:

- *Buyers – Cannot accurately predict how campaigns will reach potential customers*
- *Sellers – Must provide make-good weight for campaigns under-delivering due to statistical “noise”*



CRE Local Measurement

Trend on Relative Errors/GRPs – Outstanding Questions:

1. How much variability is due to impact from declining ratings versus decreasing effective sample sizes
2. How can we bring national standards to local? Is the problem with diaries solvable?
3. What are the business implications if we cannot do better?



CRE Local Measurement

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
2001	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
2003	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
2005	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
2007	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
2009	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

CRE Local Measurement

Anticipated learnings/impact:

1. Update to May 2012 – Defining the scope of the variability
2. Define better business practices to deal with limitations of research
3. Focus on improving/replacing diary methodology



CRE Local Measurement

Next Steps:

1. Produce educational document (white paper) using our relative error trends and GRP trends
 - Buyers and Sellers in agreement
 - Cable same issues as broadcast
- 2. Need recommendations for consultant
- 3. Produce RFP



CRE Local Measurement

Thank You!



Digital Research Committee

Richard Zackon, Facilitator



Return Path Measurement

Pat Liguori, Chair



Media Consumption and Engagement

JoAnne Burns, Chair



Universe Estimates

Nancy Gallagher, Chair



ROI

Dave Poltrack



Communications Committee

Emily Vanides, Chair



Projected 2012 Calendar

	Q1	Q2	Q3	Q4
Announcement: RFP	MCE			
Announcement: Study Launch		Sample Quality, Social Media		
Announcement: Study Results		Digital		Sample Quality, Social Media
Announcement: Other	New Members		Internship, New Members	New Members
“Meet The CRE” Webinar	X		X	X
Client Research Webinar		Digital		Sample Quality, Social Media
Mini-summit			Local Measurement?	ROI?
Quarterly Newsletter		X	X	X
Guest columns in TVBR	X		X	X
Other	CRE Logo	Website enhancement	Website enhancement	
Other		Social Network Initiative	Accuracy in Press Initiative	Invite Reporter to Meeting

LinkedIn Update

Summary

Demographics

Growth

Activity



Research 28%

Marketing 10%

Sales 9%

Business Deve... 8%

Media and Com... 6%

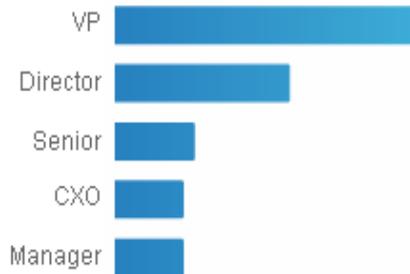
Consulting

STARTED ON

MEMBERS

162

SENIORITY



COMMENTS LAST WEEK

0

LOCATION

67% Greater New York City Area

Also from Denmark, Australia, and China



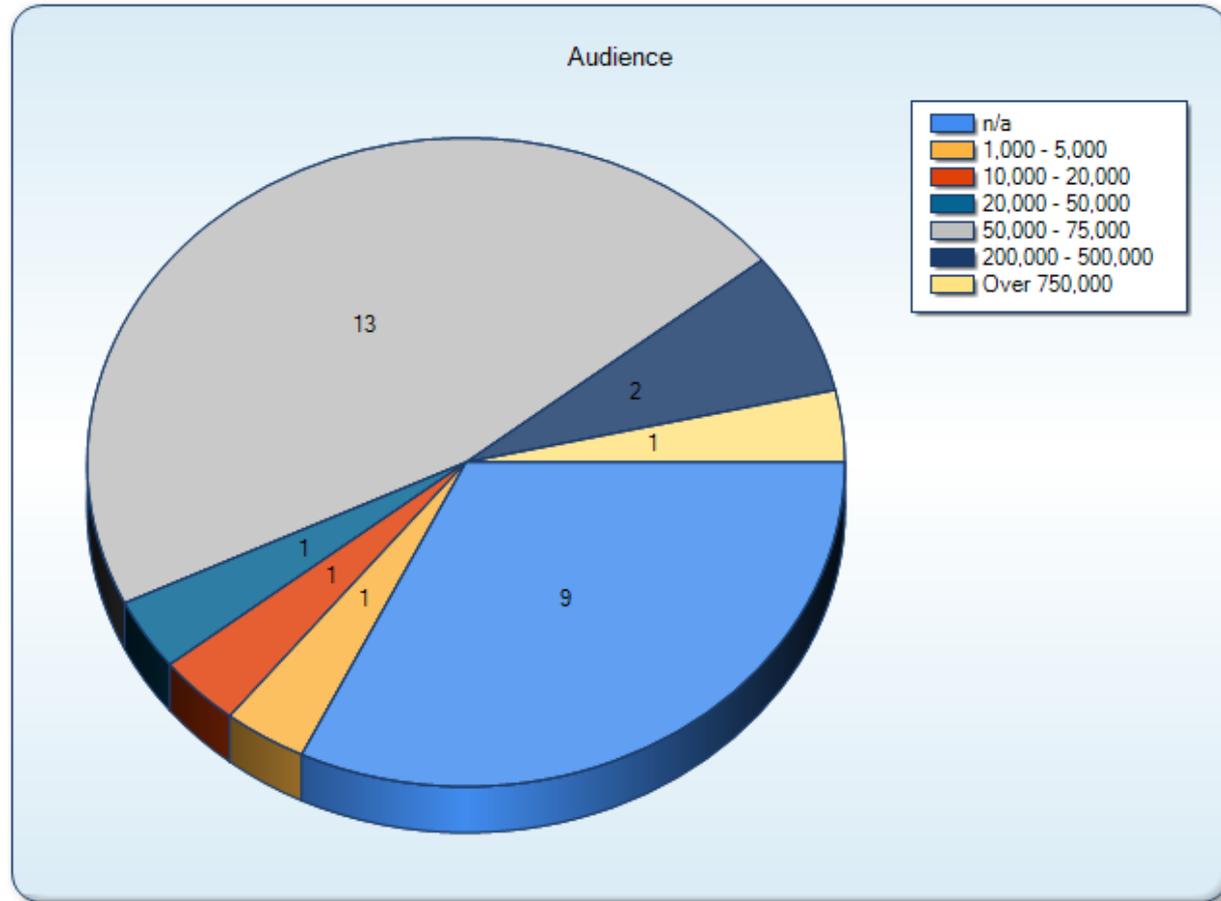
PR Update

- Key Trade Outlets:
 - Cynopsis (14,000 monthly UVs / 59,000 subscribers)
 - MediaPost (20,000 UVs)
 - Broadcasting & Cable (40,000 UVs est.)
 - RBR/TVBR (18,000 UVs)
 - TVNewsCheck (6,000 UVs)
- Estimated 15.9 million impressions*
 - For period following SQ study announcement
 - Covering viewing of Digital, SQ news
 - Does not include “viral” pick-up of digital release on sites such as Yahoo, as transmitted via PR Newswire



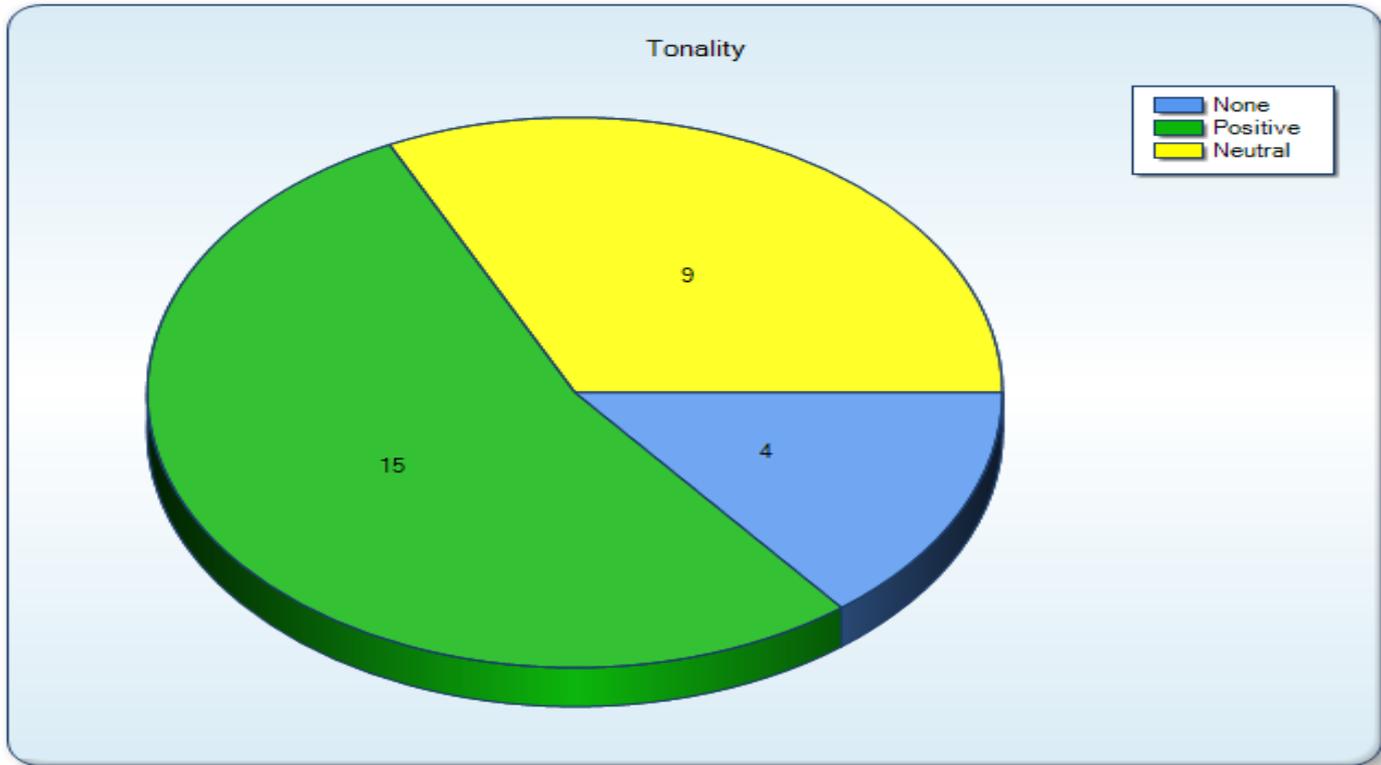
* Burrelle's-Luce estimate

Distribution of News Outlets by Audience



* Past 45 days; Burrelle's-Luce estimate

“Tonality” of Recent Coverage`



“Nielsen-Funded” ...?

The screenshot shows a MediaPost blog post from February 10, 2011. The article is titled "Nielsen Funded Research Council Issues RFP For 'Digital Audience Measurement,' Will Nielsen Bid?" by Joe Sandrese. The text discusses the Nielsen-funded Council for Research Excellence (CRE) and its request for proposals for a project to advance digital audience measurement. It mentions that the objective is to examine how various digital publishers capture and maintain user data, and to understand the role this data can play in supplementing research panel data to augment audience measurement. The article also notes that the Council said the project should help assess current data-collection practices as well as practices to "strengthen hybrid (panel-based/server-based) digital audience measurement that no confidential or proprietary information is being sought."

The screenshot shows a MediaPost blog post from May 8, 2012. The article is titled "Industry To Test Methods For Improving Nielsen Sample Biases" by Joe Mandese. The text discusses the Council for Research Excellence (CRE) and its plan to study various TV audience measurement methods in order to better understand so-called "response bias" in Nielsen's address-based audience samples. The CRE said it would test these methods in three-markets with the objective of coming up with methods to improve Nielsen's paper diary-based TV audience measurement service. The three markets include Dallas-Fort Worth (which is also a Nielsen Los Albuquerque-Santa Fe, (which is also a Nielsen TV set meter market), Cape Girardeau, Missouri-Harrisburg, Illinois (which is a diary market). The CRE said the markets were selected due to the differences in the market sizes, geographies and populations. During Nielsen's May 2012 diary measurement period, a separate diary in Dallas, while identified "non-TV homes" in all three markets will receive sampled homes in all markets will be mailed a short questionnaire seek equipment ownership and general viewing patterns. Homes identified set will be contacted and asked if they have any source of viewing tek saying "yes" will be sent a modified diary in which they will be asked to and the device used for viewing. This new study is the second major effort for the CRE's Sample Quality

The screenshot shows a MediaPost blog post from March 30, 2012. The article is titled "CRE To Study How Mobile Impacts TV Viewing" by Debbi Seeger. The text discusses the Council for Research Excellence (CRE) and its plan to study how mobile devices are affecting TV viewing behavior. The CRE is seeking insight into simultaneous usage of a mobile device while watching TV - something NBCUniversal will look to measure with Olympic programming this summer. Other issues to study: Does mobile viewing cannibalize TV viewing or help increase it? What are the most popular ways for users to access video content on a mobile device, whether it's an app or another entry point? The CRE also wants some broader figures, such as estimates of reach and time spent consuming mobile media and where and when consumers are doing it the most. It wants to compare its data-collecting methods with how other industry researchers are seeking answers to these difficult-to-grasp matters. *As usage of mobile devices expands, and the lines differentiating those platforms blur, it is incumbent upon the media industry to understand the trends and prepare for the future with respect to content development, advertising and measurement." stated Joanne Burns, an executive vice president, 20th Television Fox, who chairs the CRE's Media Consumption and



Communications Budget

	<u>2011</u>	<u>2012</u>	<u>2012 vs. 2011</u>
<u>Administrative Expenses</u>			
Administrative Assistant	\$14,161	\$22,600	\$8,439
Conference Line	N/A	\$3,000	
Printing	N/A	\$500	
Transcription	\$1,827	\$2,250	\$423
WebEx/Standard Charge	\$738	\$1,189	\$451
WebEx Additional Charge/Webinars	N/A	\$4,000	
WebEx Additional Charge/Quarterly Meetings	N/A	\$4,000	
Miscellaneous	\$0	\$1,000	\$1,000
Total Administrative Expenses	\$16,726	\$38,539	\$21,813
<u>Communication Expenses</u>			
Graphic Design	\$0	\$2,000	\$2,000
P/R Services	\$36,000	\$36,000	\$0
P/R Wire	\$0	\$3,180	\$3,180
Social Media	\$0	\$25,000	\$25,000
Website	\$65,697	\$48,000	-\$17,697
Miscellaneous	\$0	\$500	\$500
Total Communication Expenses	\$101,697	\$114,680	\$12,983
<u>Meeting Expenses</u>			
Quarterly Meeting	\$64,000	\$50,000	-\$14,000
Wine & Cheese Event	\$0	\$1,500	\$1,500
Total Meeting Expenses	\$64,000	\$51,500	-\$12,500
Proposed Survey	\$0	\$10,000	\$10,000
Grand Total: Communications Committee	\$182,423	\$214,719	\$32,296

Education Committee

Sharon Warden, Chair



New Business

