

M R C C REVIEW

The newsletter for all media professionals

What Are They Thinking?

For the past several years, we have started off each January with point of views from notable figures in our media research world. It is always interesting to see whose thoughts you agree with; and whose you don't. So we've asked a few key leaders their ideas on the year past and future. What are they really thinking?

Our gracious contributors include:

Josh Chasin; Chief Research Officer, comScore, Inc
Jamie Arvizu; Business Intelligence Director, OMD

Kate Sirkin; EVP, Global Director of Research, Starcom MediaVest Group

Adam Weiler; 2009-10 MRCC President and Director, Solution Business Planning, Mindshare

Beth Uyenco; Global Research Director, Advertiser and Publisher Solutions Group, Microsoft
Alice Sylvester; Partner, Sequent Partners

• I think there have been a few interesting new developments in research this year. The new Nielsen PRISM in-store measurement research is of interest to a number of our CPG clients and could be very breakthrough in assessing the impact of in-store media on sales. Also, I think the way that the current recession is affecting the media industry as a whole is major news. There will continue to be shake-ups and budget cuts across the media and research companies. It will be interesting to see how it changes the landscape a year from now. (Jamie)

• The advances in more detailed media data that allows us to focus on the advertising/brand integration piece more than the vehicle that carries it - from many places - TiVo, TNS, Nielsen/IMMI, comScore, Nielsen Online, and all the social media analytical tools. (Kate)

• I think the growing interest in social media and behavioral targeting has been one of the bigger stories of the year. Finding out about consumers through their behavior and conversations across multiple platforms will be a challenge that highlights the need for coherent and accurate measurement of those audiences. As we head towards the ability to communicate with people on a one to one basis, the ability to know all we can about that person will be key. (Adam)

• Probably the creative way in which AGB and SRDS/PERQ changed hands. No money, just a swap of properties was very innovative. This was particularly interesting as it followed in the heels of WPP's purchase of TNS. (Beth)



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Research Director, Advertiser and Publisher Solutions Group, Microsoft
Alice Sylvester; Partner, Sequent Partners

1. What would you say was the biggest media research news in 2008?

• No one headline jumps out at me, but I think the biggest media research story of the year is that a confluence of factors—audiences and advertisers leaving traditional media like terrestrial radio and newspaper, technology enabling addressability on digital platforms (e.g. mobile, set top box TV)—is fundamentally changing the media research landscape. The tried and true ways we've been doing things for 80 years, fundamentally accepted bedrock assumptions like the efficacy of random sampling, simply won't work moving forward. Probably the prototype audience measurement tool of the 21st century will involve census level digital data (e.g. Set Top Box data) integrated with person-centric data (i.e. a panel) in what I'm calling a panel-centric hybrid. Set Top Box data might not replace the Nielsen ratings, but it would be foolish to argue that a zero-based system today would not rely on such data as a core component. (Josh)

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PRESIDENT'S NOTES

by [Adam Weiler](#)
[Mindshare](#)

Welcome from the New MRCC President

First of all, I would like to thank the outgoing members of the MRCC board for their hard work and dedication over the past two years. Julia Johnston has generously agreed to continue assisting the club as the editor of the newsletter and Jen Rhodes has and will continue to be valuable to the MRCC for her insights and input. I would also like to thank the three board members who have re-enlisted for the next term. And of course, on behalf of all members of the MRCC, I would like to express my deep thanks and admiration to everyone involved with the MRCC Symposium in October. Together this team helped to move the club forward and I look forward to working with the new board to build on the momentum generated over the last few years.

There have been some changes over the last few years that have served the club well. Renewed efforts at membership have increased the profile and vitality of the club in our community. Over the next two years, I would like to continue to expand our membership. As interactive and digital media opportunities increase, so do the opportunities to measure the audiences using those channels. While there is no shortage of digital expertise in our ranks, I believe that the MRCC can and should appeal to media research professionals in these rapidly emerging fields and will look to expand membership into this emerging frontier.

The newsletter has seen some changes in the last two years as well, moving to a quarterly, electronic format and focusing more on generating advertising revenue. While I'm sure we will continue to make small changes here and there to improve the newsletter, I want to make the website a priority for the next year. The website can and should be a connection point for all members of the club. I would like to explore how we can use the website to facilitate communication between members more frequently. The Website can and should continue to be a resource for archiving newsletters and presentations and providing payment options, there are many other possibilities for using our website to enhance communication to and between members.

I look forward to seeing everyone at the **February 10th** meeting where **Annie Toulitos** and **James Russo** of Nielsen will discuss trends from last year and the next. In the meantime, please feel free to share any ideas or suggestions you have about expanding membership to our colleagues in the digital realm and expanding the possibilities of our website. Happy new year to everyone and I look forward to seeing you at the next luncheon. **MRCC**

Watch for our Quarterly MRCC Review starting in February!

We are still looking for one more editor for the MRCC Review.

If you are interested, contact Julia Johnston at julia.johnston@nielsen.com or 312-385-6527.

Note: The MRCC has made arrangements to accept credit cards via PayPal (Visa, MC, Amex, Discover). This must be done when registering online. Credit cards cannot be accepted at the door. Please be aware that there will be an additional 4% processing fee when paying by credit card.

Meeting Calendar

PLEASE RSVP!

Topic	2008 review and 2009 trends
Speakers	Annie Toulitos and James Russo, The Nielsen Company
Date	Tuesday, February 10th, 2009
Place	Maggiano's Banquets 111 W. Grand Avenue The Amarone Room
Time	Noon to 2 p.m.
Price	\$35 member \$45 non-member \$5 additional charge for Walk-Ins
Menu	Buffet-style lunch
RSVP	RSVP at www.mrcc-online.com by noon Friday, February 6th. Cancellations must be received by Noon Monday, February 9th.

NOTE: Be sure to RSVP to guarantee yourself a seat. We can only handle a small number of walk-ins.

UPCOMING EVENTS

No Meeting in January!!!

February 10 - Year in review

March 10

April 14

May 12

June 16

July 14 - Summer Outing!!!

August 11

September 8

October 13

November 10

December 8 - Holiday Party!!!

Couple of things:

- The swiftness with which the economy tanked and the fallout on advertisers and agencies. The demise of Project Apollo – will the industry ever get to see the promise of single source data? Nielsen entering the radio measurement business — is that for real? I never would have seen that coming. Not now, not in this environment.

- Lastly, the curious lack of enthusiasm for MRI's issue-specific audience data. (Alice)

**Manufacturers, agencies,
and consumers alike are looking
for greater value out of each
and every dollar spent.**

2. Looking to the future, what do you see as your biggest challenge or oppor- tunity in 2009?

- The biggest challenge is the introduction of discontinuous change—of (gasp!) breaking trends—to media research systems. If research users want material improvement, by definition the result will be material changes in the data (or else the improvements aren't material.) The biggest opportunity, of course, is the introduction of discontinuous change to media research systems. (Josh)

- I think one of our biggest challenges as an industry continues to be finding and tracking the proper ROI measures for each of our clients. We all aim so high to make sure we are tracking these measures effectively, but often the research doesn't meet all of our needs. (Jamie)

- Finding the time and skilled people to scale and monetize the analytics that come from this detailed data. (Kate)

- The struggling economy will undoubtedly be one of the biggest challenges for the industry next year. Manufacturers, agencies and consumers alike are looking for greater value out of each and every dollar spent. Strong pressure to provide evidence of that value in a new wave of stretched budgets will be something we will all have to deal with. (Adam)

- The economy—never have seen it this bad and the extent to which it is impacting our industry. (Beth)

- I guess keeping the momentum going on some really smart new measurement methods in light of the poor economy. It will be tough

because everyone's natural inclination is to sit back and wait things out. The demise of Project Apollo and Nielsen parting company with IMMI is indicative of how the environment will squeeze media measurement innovation. This could be a really good year for people to experiment on a small scale – take time to learn something new without a huge financial commitment. That's the biggest opportunity in '09 – how to continue learning. (Alice)

3. Listening to the consumer was a huge trend in 2008, how do you see this evolving and how is it effecting your business?

- We've always listened to the consumer. We used to call it market research. Now we call it something else—customer listening, CGM, buzz, social media. The sea change taking place is that digital technology provides the consumer with so many ways to leave his/her opinions strewn around for the mining, so we no longer have to ask a lot of silly questions to know what's in the consumer's mind. But it's still research, in the sense that input from customers about likes, dislikes, attitudes, perceptions, and brand preferences guides subsequent marketing initiatives. Let's not over-complicate this; really, it couldn't be simpler. Customer listening is technology-enabled 21st century market research. (Josh)

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the consumer. We used to call
it market research.**

- I think the media community in general has definitely increased our focus on the consumer over the last decade, but this continues to grow in importance as consumers gain more and more control over their media experiences. I think it forces us to be more creative in the ways we address them and to look for opportunities to engage them with tools and communication that are more relevant to their lives and lifestyles. (Jamie)

- I think it's frightening it took so long for the industry to jump onto this trend - we've been "listening" for quite a while now! (Kate)

- I think it is only going to grow over the next few years. Consumers are using new technologies and systems to talk to each other and figuring out how to determine which of those messages are helpful to us in the media and advertising communities and how is going to be a daunting, but exciting challenge. As

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the people that count.**

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Julia Johnston at (312) 385-6527
or julia.johnston@nielsen.com

media fragments, so too will audiences, that will provide some challenges I'm not sure anyone's toolbox fully addresses right now. I also anticipate that privacy issues will be a major obstacle sooner rather than later. (Adam)

- I don't think this was a huge trend. There have been many marketing companies particularly the media agencies who've been doing this for quite a number of years. (Beth)

- I personally believe the consumer can only tell us so much. I'd rather observe them than ask them about their behavior. I'd rather invest in research techniques that aren't rationally or cognitively-based. I'm a huge believer in experi-

We will also need to look for growth in new places - new categories, new contacts, new markets and new services....

mentation with biometric measures, metaphors, storytelling, archetypes and other research methods that do an "end-run" around the consumers' ability to report what they think they do. I love the expression, "Your actions are speaking so loudly I can't hear your words." There's more to be learned with other research methods. It's a great challenge. (Alice)

4. How are you and your team/company changing to be strategically positioned for the next few tough economic years? Do you think it will be as tough as forecasted?

- My company operates primarily in the digital space. I may be overly optimistic, but I expect the recession to be differentially kind to digital media. I think consumers and advertisers both will shift dollars into digital, because it provides value. For consumers, for example, as much as I love reading the newspaper, I fear that many will choose to cancel their subscriptions because "I read it on the web." One esteemed agency researcher told me that he could imagine consumers dropping pay tiers on cable; dropping newspaper subscriptions; even cancelling satellite radio. "But no one," he said, "is going to cancel Internet access." So as I say, I'm guardedly optimistic. (Josh)

- I definitely don't think the next few years will be easy. Everyone seems to be cutting back their budgets, despite the opportunity to gain share of voice (and share of mind) in the marketplace. We've done a good deal of recession

research to understand how it is impacting consumers and their media and purchase behaviors and are sharing this knowledge with our client partners to help them navigate the changing landscape, but nothing is certain. So we do our best to address their strategic needs today, while still looking toward their future goals. (Jamie)

- Yes - it will be as tough as forecasted I think, understanding the consumer, being able to analyze rich datasets and develop future focused strategies will be critical - that's an exciting future for all involved in research. We will also need to look for growth in new places - new categories, new contacts, new markets and new services for a media communications company. (Kate)

- Our company has gone through some reorganization lately to enable and encourage all of us to work with our clients more holistically as business partners beyond just media and marketing. By aligning ourselves more closely with our clients organizational and growth goals, we are more invested in their success and they rely on us much more for our insights and guidance. While I certainly hope for the best, I do think that the times ahead will hopefully highlight the value of media research. (Adam)

...it's possible that advertising's ability to stimulate demand for products will be even more appreciated...

- The forecasts are really grim so we're positioning our business to keep us as flexible as possible. The most optimistic scenario is that recovery begins in second half of 2009. More likely is that we don't see improvement until 2010. I'm hoping for the best! (Beth)

- Yes, 2009 will be a tough year. But there should still be a lot of activity. So far, not all advertisers are cutting everything. (She said confidently.) In the end, it's possible that advertising's ability to stimulate demand for products will be even more appreciated once the initial budget cuts take their toll. We just need to keep focused on improving ROI and measuring marketing's contribution. (Alice)

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Join the MRCC

You know you like it. You know you want it.
So go ahead and do it!

Membership Plans

Individual memberships - \$30 for one year / \$50 for two years.

Corporate memberships - \$325 for one year.

Check out www.mrcc-online.com for benefits and to sign up.

Top Ten Reasons to Join the MRCC

1. Best place in the midwest to hear what's happening in the world of media research.
2. Once a month you'll get a real lunch break.
3. Great food - and all you can eat of it!
4. Chance to catch up with the latest gossip before the luncheon.
5. Procurement/financial officers love it when you tell them you're going somewhere at reduced (member) rates.
6. You're supporting the only club of its kind in this part of the country.
7. It's the best bargain around.
8. It's the New Year - that means a new budget.
9. It's cheaper and easier than joining the health club.
10. We need you!

5. (Take your pick) What are your New Year's Resolution(s)? What's your favorite cartoon character and why? Really, what do you want to be when you grow up?

• My new year's resolution is to develop more of a taste for beer; my favorite cartoon character (if this counts) is Shrek, because he's an ogre with a heart of gold and I empathize with him; and when I grow up I want to be more like Alice Sylvester. Season's greetings to all my friends at MRCC. (Josh)

Interesting questions

• New Year's Resolutions: To exercise more than this year (shouldn't be too hard), to spend

more time with my family, to not get distracted by all the minor stuff at work, and to have more fun!

• Favorite cartoon character: So many to choose from, but I'd have to say Bugs Bunny – he's funny, daring, a lot crazier than I could ever be, and yet always seems to be in control.

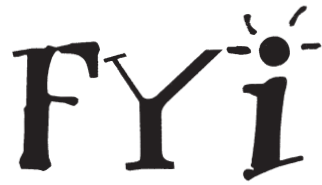
• I still don't know what I want to be when I grow up – I always thought it would be fun to be in charge of network programming, or producing/directing TV shows, but who needs the career instability (which I know sounds crazy coming from someone who works in advertising – it's all relative, I guess). (Jamie)

• My new years resolution is not to fall asleep when reading to my kids....(Kate)

• I still harbor dreams of being the first baseman for the Chicago National League Ball Club – Go Cubs! (Adam)

• Improve my priority-setting abilities! (Beth)
• When I grow up, I want to make a lot of money. Here's why: one of my favorite quotes is ... "There are a lot of things more important than money, but they all cost money." I want to be doing something pretty close to what I'm doing now. Except (and here's where the money thing comes in) I'd travel anywhere I want to go at any time. I'd work, too, but definitely take off to fabulous places and fabulous events at a moment's notice! (Alice). **MRCC**

Comments and suggestions can be sent to directly to board members or go to the website and click on [CONTACT](#).



The Nielsen Company will begin local market radio audience measurement and reporting for 50 markets in 2009. Please contact your Nielsen representative for further details..... MRI-Starch has begun collecting syndicated Print Ad Recall metrics through the E-Starch online method. **MRI-Starch** has begun measuring multiple issues of 100 Consumer Print Titles on a regular basis. For more information about the MRI-Starch service, please contact MRI at 800-245-1551.....Internet reach and frequency is now available through Nielsen Online's Netview system via **IMS!** Reach and frequency results previously available only in the Webrf tool can now be accessed directly in the Netview tool as well. For more information, please contact Gail Murphy at IMS at 312-583-5352 (gail.murphy@nielsen.com) or Jill Partner at 312-385-6551 (jill.partner@nielsen.com).

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EMAIL TO: DANNIELE MEGLEN

If you would like to fax us your lunch reservation, please fill out the information below and email it to danniele.meglen@mtvstaff.com by Noon, the Friday prior to the meeting.

Name _____
Company _____
Phone # _____

Paypal (\$35 + 4% processing fee) Member (\$40) Non-Member (\$45)

No shows will be billed — cancellations must be received 24 hours prior to meeting.

The *MRCC Review* is published 4 times a year.

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