

THE HARMELIN MEDIA REPORT

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CIMM: The Future of Media Measurement? by Samantha Gundlach

Tiger Woods and His Sponsors in the Rough by Maggie Fogarty

As we enter a new decade, many believe that we are in need of new forms of audience measurement, and some are not willing to wait. A group of major media companies, advertising agencies,



and marketers have taken matters into their own hands and formed the Coalition for Innovative Media Measurement.

According to their website, "CIMM is a group of buyers and sellers of advertising supported media formed to promote innovation

and explore new high quality ways to measure audiences across traditional and new media in the United States." The coalition was founded by many recognizable names including NBC Universal, Walt Disney, Viacom, Time Warner, and Procter & Gamble. They intend to initiate and fund the development of advanced forms of TV measurement through set-top box data as well as cross-platform media measurement.

A set-top box (STB) is essentially a computerized device that processes digital signals. Manish Bhatia, President of Advanced Digital Client Services at Nielsen, says that "...STB data enables a much deeper dive into audience behavior than possible with audience samples used to currency measurement. We can provide insights into networks that currently are not reported...start looking at smaller and smaller geographies, demographics and time periods." Viewers are engaging in new behaviors as TV becomes more and more interactive and advanced. The information received from STB will provide some insight into these behaviors.

The objective of CIMM is not to compete with Nielsen Media Research, but to work towards the common goal of a single-source media measure

(Continued on page 3)

Will the once-flawless image of Tiger Woods be flawed forever? Just ask his sponsors. Over the past 13 years, Tiger Woods has managed to gain endorsement deals that have made him worth over a billion dollars. Woods had acquired sponsors such as Nike, Buick, EA Sports, Gillette, Accenture, AT&T, Gatorade and

American Express, just to name a few. However, in just a few short weeks, Tiger has managed to force his sponsors into reevaluating their relationship with the professional golfer due to recent revelations about his personal life.



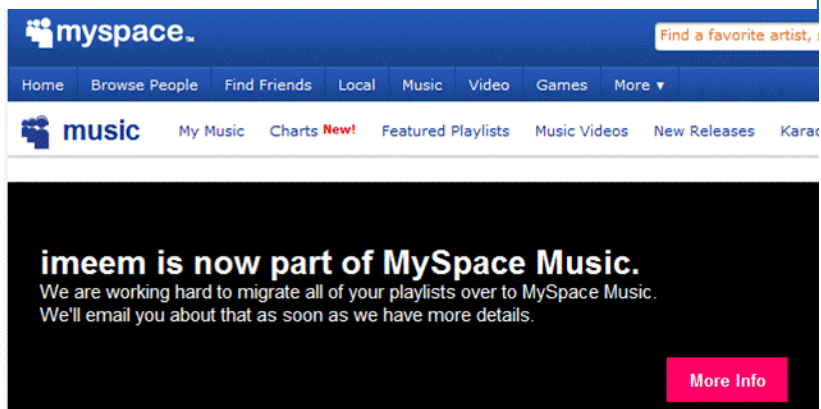
The marketing question is, should companies stay behind Tiger or cut their ties? Some sponsors like Accenture and Tag Heuer have already made the decision to end their agreement with Woods, while others like Gillette are simply not running his advertisements for an "indefinite" amount of time. Some sponsors like Nike continue to carry the golfer, claiming that Tiger is an incredible athlete, and he has their full support. However, most sponsors are reconsidering future campaigns with Tiger.

What does this do for advertising? Many consumers are sensitive to the recent events with Woods, and companies are going to take account of that. This just goes to show that there is no sure thing with advertising in sports. Using sports celebrities can often be risky for corporations who choose to have one major "face" for all of their advertising. The company Accenture, a global consulting firm who recently dropped Tiger as their representative,

(Continued on page 4)

What Happened to imeem? Questions Surround MySpace's Acquisition of imeem by Dan Cox

In early December, MySpace Music announced the news that they had "completed a deal to acquire certain assets of imeem – a leading social media music service." In the same press release announcing the finalization of this deal, MySpace noted that it would be working quickly to migrate key aspects of imeem into MySpace Music, including music playlists compiled and saved by millions of users in imeem. Without much warning, imeem was offline; the entire service removed from the internet and its Smartphone application no longer functional. In short, imeem was gone. Users who attempted to visit imeem.com or access their personal imeem profiles were automatically redirected to MySpace Music, where they were told that their imeem



playlists were being migrated to their new home on MySpace, and they would be emailed with more details as soon as they were available. Nearly one month later, imeem users continue to await the completion of this transition, but as of today, the status remains unchanged.

A supported digital music site similar to Pandora and Last.Fm, imeem allowed users to access a vast array of music and videos over the web, and to create playlists customized to their preferences. Since its creation in 2003, imeem had built a loyal music community of over 16 million users worldwide.

PANDORA

Much of this popularity derived from the site's embeddable music and video playlist functionality, which enabled users not only to gather and stream libraries of music on imeem, but to embed these songs and playlists on third party sites across the web. Basically, imeem allowed people to find pretty much any music they liked free of charge, and then to listen to and share playlists of this music virtually anywhere. As of early January 2010, however, these libraries of music

(Continued on page 4)

Nielsen Pauses DVR by Michael Merring

Nielsen started measuring the usage of DVRs in LPM markets in 2005 and began offering Live viewing plus DVR playback data in June 2007. When the DVR began to impact viewing habits and was incorporated into Nielsen audience ratings, Nielsen Executive Vice President Sara Erichson said, "Nielsen worked very closely with all client groups to develop this new measurement. Our clients will determine which of these data streams they want to use for negotiating the buying and selling of advertising and whether it be for the upcoming television season or the following one."



Nielsen had issued Live-Only, Live + 3 Day, and Live + 7 Day data streams for the 24 LPM markets monthly through December 2009. The 'Live Only' data stream measured audiences who viewed programs live. The '+3' and '+7' refer to audiences viewing the programs live and up to three days later (+3) or up to 7 days later (+7). With digital video recorders growing, TV stations wanted Nielsen to include these streams so they could gauge how much time-shifted viewing occurred to programs.

However, Nielsen is very quickly ending the Live-Only data streams. Effective January 7, Live + Same Day overnight data has replaced the Live-Only overnights. Nielsen will issue Live-Only data along with Live + Same Day data streams for January, February, and March 2010. Both streams are being issued so that advertisers and stations can analysis the differences between the two in the various markets. Beginning in April, Live + Same Day data will replace Live-Only. Nielsen will no longer provide Live-Only data streams. Many advertisers feel Nielsen's elimination of Live-Only data hits the rewind for the industry's research standards rather than moving forward.

The television stations selling advertising have supported the Live + Same Day data stream from the beginning. Adding DVR viewers to the live data can only increase the ratings for their programs. They argue that DVR watchers need to be accounted for and that without the elimination of the

(Continued on page 3)

Live-Only data stream, buyers will always use the lower numbers. Their best argument is that a TV that is delayed for as little as a few seconds is no longer considered 'live' in the Live-Only data streams. The stations argue that except for whatever caused the slight delay, the viewer is watching TV in the same way that a Live-Only viewer watches, i.e. they're viewing the commercials.

Advertisers, on the other hand, have been opposed to the elimination. According to the Association of National Advertisers, the key reasons are:

- Commercial viewing levels would be overstated as local ratings are for programs and not commercials, therefore do not take into consideration commercial skipping in DVR playback.
- Many advertisers and agencies negotiate local market deals with the media using Live-Only ratings as their currency.

Harmelin Vice President and Director of Research Bernie Shimkus said, "We are disappointed in the decision. Nielsen is clearly listening to the stations more."

The commercial ratings metric would be a more desired solution for advertisers in adding DVR commercial data. The commercial ratings metric is currently used in network and national cable data reporting. Each commercial is imbedded with a code and if the DVR fast forwards through the commercial, it will not be counted as a view. This method is unlikely for local broadcast TV because it is too complex to encode commercials at the local market level.

The start date to eliminate the Live-Only data stream has been pushed back to April 1, 2010 from the original date of January 1. At this point, the switch seems inevitable.

(Continued from page 1)

CIMM

across multiple platforms – television, online, and potentially mobile. "CIMM will provide a big tent where the measurement concerns of the entire industry can be addressed," said NBC Universal President of Research Alan Wurtzel.

On November 10th, 2009, CIMM took its first steps in their request-for-proposals process by meeting with five set-top box suppliers – one of them being Nielsen. The intent was to gather feedback from the companies about how they can work together and discuss expectations. Based on this feedback, a set of RFIs were made available on the coalition's website, www.cimm-us.org, and open to all interested parties. CIMM hopes to foster a collaborative relationship with data and technology providers through this process and find potential projects to fund that meet their goals. The RFI will initially focus on the set-top box data measurement. Once research projects are completed, they will be made available to the public.

The founding participants have always intended fund these initiatives and to hire an independent managing director to handle the day-to-day operations. Jane Clarke, formerly the VP of Insights and Innovation at Time Warner Global Media Group, was recently named Managing Director of CIMM. She will be responsible for developing the coalition's strategy as it shifts away from traditional measurement.

As the media industry continues to change, it will be interesting to see the role that CIMM assumes. As the tools for understanding the behavior of media consumers improve, the more effective advertising campaigns will become.



Around the Harmelin Water Cooler

This Month's Question:

What primetime programs that are beginning their new seasons this winter are you most looking forward to watching?

Lost (ABC)	52%
24 (FOX)	39%
Idol (FOX)	16%
Bachelor (ABC)	13%
Big Love (HBO)	10%



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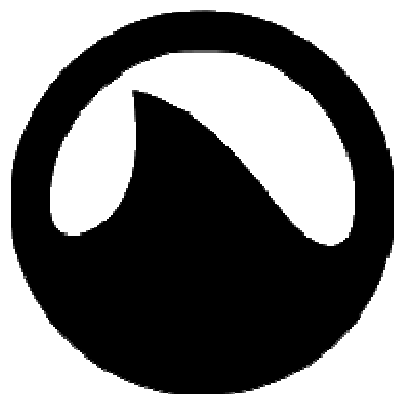
(Continued from page 2) **imeem?**

still cannot be accessed by imeem.com users, and embedded songs and playlists posted on other sites still do not load. Though MySpace Music assures that they are working to give former imeem users access to their music and playlists



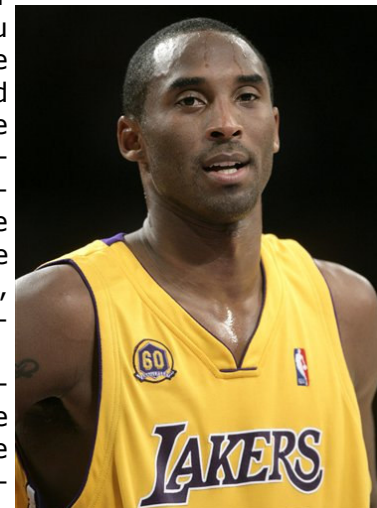
as soon as possible, many fear that their extensive playlists, including rare tracks, may be totally or partially lost.

The sudden disappearance of imeem is also troubling from a media buying perspective, as the digital music site offered highly customized advertising options to reach an extremely engaged and passionate music community of 16 million. This combination of assets established imeem as a valuable advertising site for certain brands; a niche not easily filled by other sites. It is no question that MySpace saw this value as well, and understood the importance of acquiring the imeem staff who were experienced in building the first music site on the web to offer embeddable music and playlists. What is in question, however, is whether MySpace will be able to hold onto imeem's passionate community of listeners, and continue to offer this same attractive audience to online advertisers and media buyers going forward. If the first month of the transition is any indication, MySpace may be in for an uphill climb, as imeem users remain skeptical about the merger and upset about the loss of access to their music. Meanwhile, sites like Grooveshark, and others that feature on-demand digital music offerings similar to imeem, are waiting in the wings to lure these disgruntled listeners away. The MySpace acquisition of imeem has created plenty of unanswered questions, but one thing is certain. If MySpace Music wants to have any hope of keeping these loyal imeem users and the advertisers that covet them, they better get them their playlists back... and quickly!



(Continued from page 1) **Tiger**

relied solely on him to get their message out to the public. Most consumers are not familiar with Accenture, but if you see Tiger Woods in their ads, you might be a little more curious to actually find out. So can we blame the advertisers for pulling out so quickly? Consumers want to see wholesome, perfect role models, and right now, Tiger isn't fitting that description.



Tiger isn't the only athlete to be seen by the public eye in a negative way. We also saw sponsors drop Michael Phelps after he was photographed with drug paraphernalia, and Kobe Bryant after his assault allegations. Companies need to be aware of their own image, and they have to be extremely careful with who they have representing them. Credibility and honesty are huge factors to a company, and who wouldn't want their organization associated with a positive role model - like Tiger once was.

So the question is, are the advertisers going to survive this? Probably. The headlines might be ugly for now, but it's probably safe to say that most advertisers will emerge from this without being impacted tremendously. The sponsors are left in a dicey situation. Stick with Tiger, and they risk their consumers being put off by their company. Drop Tiger, and who knows - he could come back in a few years better than ever! Who knew the world's biggest sports celebrity could be this dangerous off the golf course...

