

Towards a Total View of Consumer Media

Media Measurement Solutions for the Age of
Device and Content Proliferation

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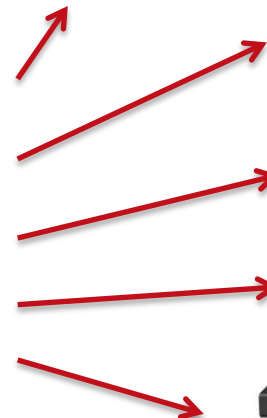
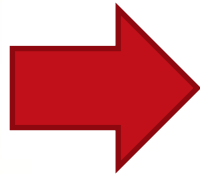
Today

- **Brief Background Cross Platform Challenge**
- **CIMM & Project Blueprint Approach**
 - **Project Blueprint**
 - **Measurement Principles**
 - **Phase II & future solutions**

Media Consumers are ahead of Media Measurement

The
New York
Times

34% of Millennials watch more online video than TV -- October 2013



Three Trends Dominate Media / Technology Landscape

1

Rapid proliferation of digital devices and platforms

- PC no longer center of gravity for digital consumers
- Smartphones, tablets introduced a new media landscape
- TV-connected devices and wearable technology promise continued change

2

Fragmentation of video/TV viewing

- Rise in digital and Over the Top (OTT) video/TV
- Viewership across devices beyond TV

3

Evolution in advertising and media buying

- From post-hoc effectiveness to real-time verification and accountability
- From “reserve” purchasing to “dynamic” ad delivery
- From media planning to Real-Time Bidding (RTB)

So What's the Big Deal?

Buyers

- Must measure true reach, frequency, GRP across platforms
- Require advances in performance metrics
- Must actively manage and reduce waste in both media units and in dollar spend

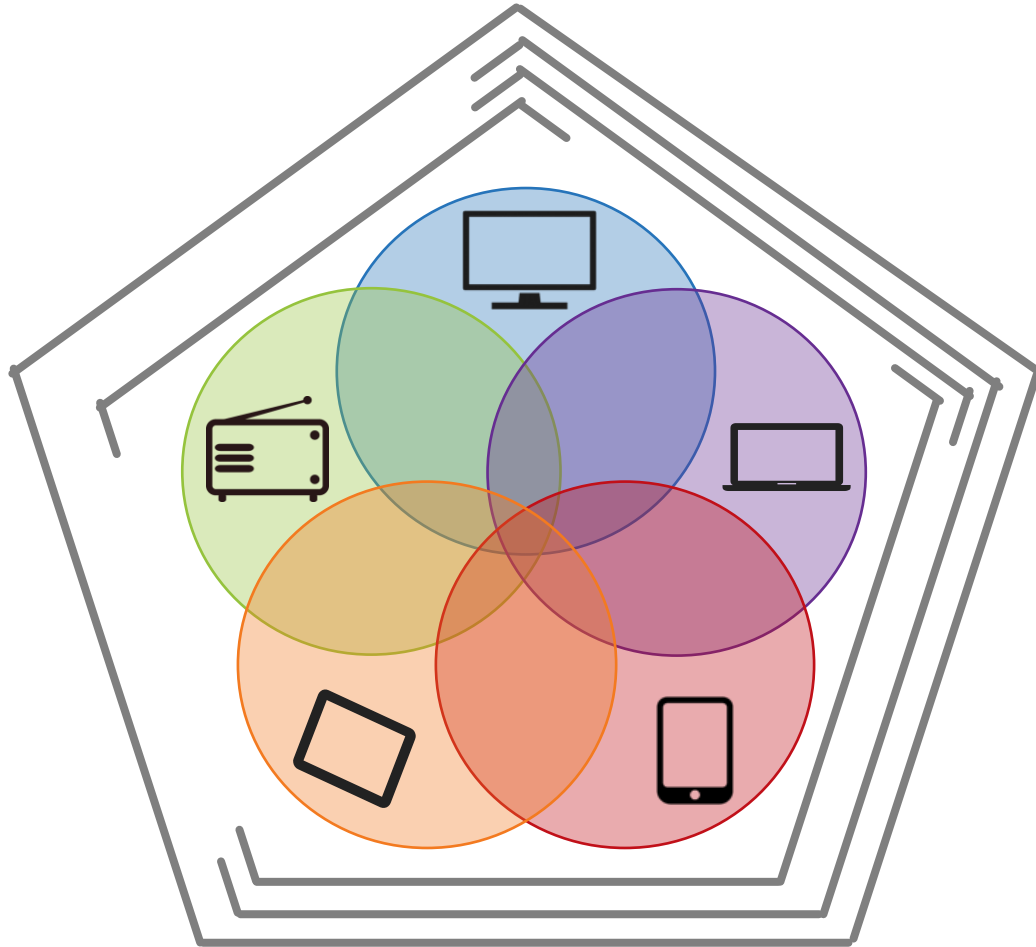
Sellers

- Effectively communicate value of new channels and position in combination with traditional
- Must adapt packaging, pricing and selling practices to win fair share of dollars from all consumer channels

Strategy

- Media consumption patterns, particularly in Video, are changing rapidly
- Content & Programming insights must address shifting consumer patterns

Measurement Landscape

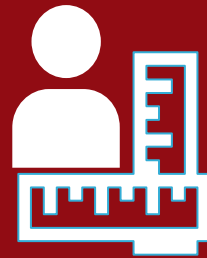


CIMM Cross-Media Studies Clarified the Research Challenge



PANELS

- + Demographics
- + Single-source
- Limited size
- Scaling is prohibitively expensive



CHALLENGE

Can we develop a methodology that leverages the value of panels with the scale of census measurement?



CENSUS

- + Necessary scale
- + Globally and nationally representative
- Cross Media de-duplication

A “Blueprint” For Solving Cross Platform Measurement

comScore and Arbitron to Launch Groundbreaking Cross-Platform Media Measurement Initiative with ESPN as Charter Client and Collaborator

First Ever Five-Platform Measurement Initiative Would Report Video, Audio and Display Content on Radio, TV, PCs, Smartphones and Tablets

COLUMBIA, MD and RESTON, VA; September 13, 2012 – Arbitron Inc. (NYSE: ARB) and comScore (NASDAQ: SCOR) announced today an agreement to develop the first-ever five-platform measurement initiative that would provide an unparalleled view of changing consumption of video, audio and display content across radio, television, PCs, smartphones and tablets.

This initiative would provide persons-level insights by integrating the complementary resources of both companies—the census and panel-based PC, mobile and TV set-top box measurement capabilities of comScore along with enhanced, single-source, multiplatform measurement capabilities of the Arbitron Portable People Meter™ (PPM®) technology.

ESPN, which has been an industry leader in the adoption and development of cross-platform audience research through its ESPN XP initiative, will collaborate on the design of this initiative as its charter client. The unprecedented size and scope of the project is being driven by the multiplatform measurement requirements of ESPN, which delivers video, audio and display content via television (both in-home and out-of-home), online and mobile video, PC web, mobile web, apps, tablets, digital audio and terrestrial radio.

Project Blueprint Methodology Principles

1

Combine breadth of census with depth of panels

TV	In-Home TV STB Data	OOH TV PPM Panel	TV Demos PPM Panel
PC	PC comScore Census	PC comScore Panel	
SMART-PHONE	Phone comScore Census	Phone comScore Panel	
TABLET	Tablet comScore Census	Tablet comScore Panel	
RADIO		Radio PPM Panel	
	CENSUS comprehensive measurement		PANEL demographics

Project Blueprint Methodology Principles

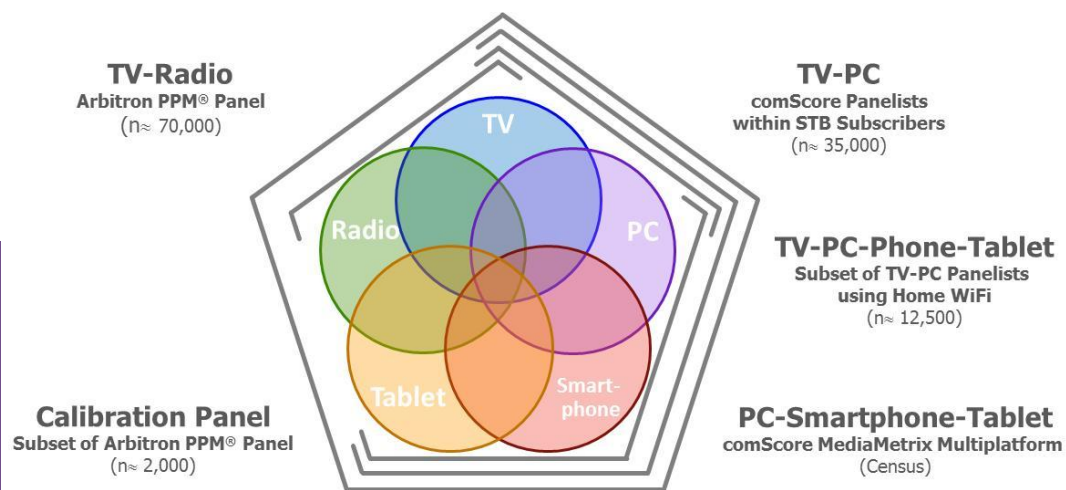
1

Combine breadth of census with depth of panels

2

Use best source of single-source data for cross-media duplication

“Best Source” means multiple sources, depending upon the 2-way/3-way+ duplication needed



Project Blueprint Methodology Principles

1

Combine breadth of census with depth of panels

2

Use best source of single-source data for cross-media duplication

3

Use best-in-class syndicated measurements for each medium

No need to 'reinvent' where best-in-class solutions exist today:

- Nielsen Audio
- comScore Video Metrix™, Media Metrix™, Mobile Metrix™

Establish new TV solution that combines panel+census

Combines Nielsen Audio PPM panel with comScore TV Return Path Data

Radio

Mobile

Digital Video

Web

TV

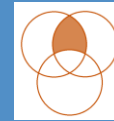
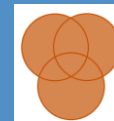
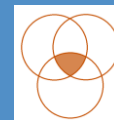
Phase I: Input / Output

INPUT

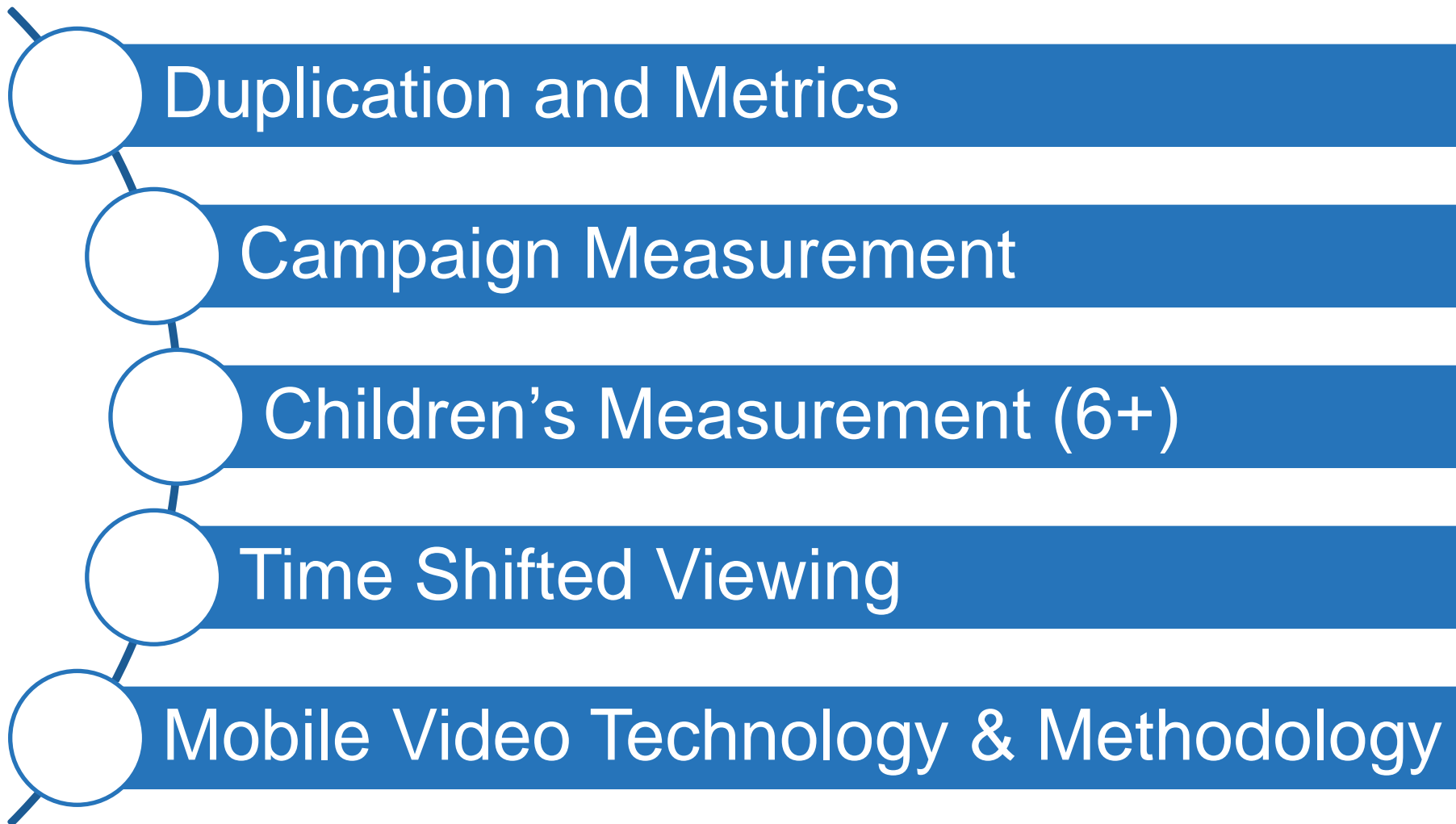
- Age/Gender segment
- Up to five entries where each entry corresponds to a
 - Platform {TV, PC, Radio, Digital, Mobile, Phone, Tablet,}
 - Content Type {Total, App, Web, Video}
 - Entity name (show, radio station, network, website etc.)
 - Location {total, in-home, out-of-home}
 - Week(s)
 - Day(s)
 - Daypart

OUTPUT

- Across the entries, the output report includes
- Audience estimates for:
 - All AND combinations (intersections)
 - All OR combinations (unions)
 - only-sets for all AND combinations (relative complements)
 - only-sets for all OR combinations (relative complements)
- Duration estimates per entry for every combination



Phase II Objectives Build on Phase I Accomplishments



Benefits

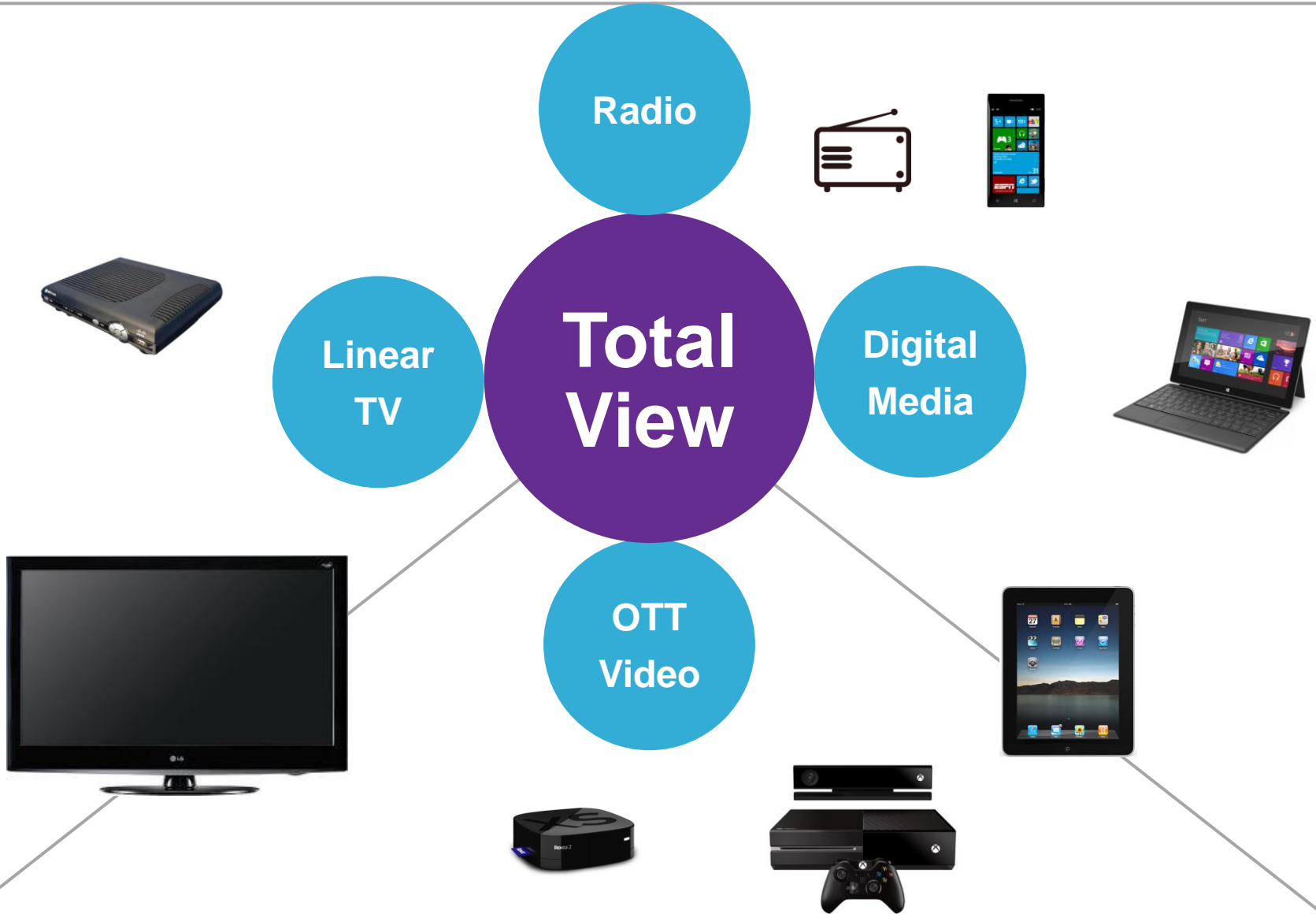
Publishers & Media Brands

- Measure **total audience** – across TV, radio, PC, smartphone and tablet
- Understand **incremental increase** in audience as content is delivered on multiple platforms
- Uncover insights about which **forms of content are most effective** on a particular channel and to which audiences
- Determine how **consumption** of their content varies by demographic composition and media channel

Brands & Marketers

- Understand **size and composition** of audiences reached for multi-screen campaigns
- Use **common metrics** across platforms: reach, frequency, impressions, GRPs/TRPs
- Plan **reach, frequency and timing of exposure** across channels to improve audience targeting and effectiveness
- Determine **incremental reach** gained by adding platforms to campaigns

Towards a Total View of Consumer Media



Thank you!

For more info, contact your comScore Account
Manager or email learnmore@comscore.com

