Arbitron and CIMM
Single-Source, Three-Screen Audience Measurement Pilot
Reveal

Jane Clarke
Managing Director
CIMM
(Coalition for Innovative Media Measurement)

Carol Frost
Vice President Product Management
Cross Platform Services
Arbitron Inc.
What Is CIMM?

CIMM is a coalition of buyers and sellers of media working to innovate and test new methods for the industry to:

1. Improve TV audience measurement through use of return-path data
2. Solve the Cross-platform measurement challenges
Cross-Platform Measurement

Plan → Verify Exposure → Evaluate Effectiveness & ROI

© 2012 Arbitron Inc. and the Coalition for Innovative Media Measurement
CIMM Project Objectives

» Determine the feasibility of building a single-source, three-screen (TV, PC, and mobile) panel

» Measure three-screen media usage for selected programs and advertising campaigns

» Gain understanding of how to scale in the future

» Gain new insights on three-screen users and usage
Important Considerations for CIMM

» Sample targeted to cross-platform users
» Direct link between TV viewers and PC users
» Workplace media usage is important
» Use data dictionary to identify websites and eliminate limitations of client burden (whiteboard)

» Include measurements of:
  • Users and usage
  • In-home and out-of-home use
  • Simultaneous usage

» Provide a user interface that permits easy data mining
CIMM Scope and Timing

- 500 person, single-source panel of three-screen users drawn from reactivated Arbitron PPM® currency panel members
- Panelists aged 18 and above
- Three-month measurement period: November 2011–January 2012
Measuring Individual Panelist’s Use of Three Screens

PPM tracks broadcast & cable TV + online video commercials

PC meter tracks Internet URLs on home and work computers

Mobile device meter tracks Internet use by browsers or apps on Android™ & BlackBerry® smartphones

© 2012 Arbitron Inc. and the Coalition for Innovative Media Measurement

BlackBerry is registered trademark and Android is a trademark
Step One: Pre-Recruitment

» Surveyed former PPM panelists for interest and eligibility:
  • Broadband Internet at home
  • Smartphone ownership

Observation: Panelists who had previously registered an email address with Arbitron were more likely to become CIMM panelists
Building the Panel—A Four-Step Process

Step Two: **Recruitment**

» Called eligible and interested households
  – Potential panelists were asked to carry the PPM and install Internet meters on their phones and PCs
  – Partial households were accepted
  – 42% eligible from prescreening agreed to participate

Step Three: **PPM Equipment Installation**

» PPM equipment was mailed to households that agreed to participate

» Panelists self-installed PPM equipment
Step Four: **PPM panelists installed Internet measurement software on their PCs and phones**

» Only Windows PCs were eligible
  • Tablets and Mac®s were ineligible

» Only Android and BlackBerry phones
  • iPhones® were ineligible
Building the Panel

» Panel built in waves from July through Oct. 2011
  • Panelist communications and incentives were refined between waves

» Panelists received incentives for:
  • Carrying the PPM meter
  • Successful installation of software on a PC
  • Successful installation of software on a mobile phone

» Panelists also entered into monthly sweepstakes
Panelist Login Directly Linked Users to PC Use
Addressing Privacy

» Privacy statement was included in the installation process
» Panelists “actively accept” software meters
» Children were not tracked

» Arbitron had a prior relationship with the panelists:
  “I had privacy concerns and then I took a leap of faith and our family has been in an Arbitron study before...I never felt there was any issue, and so I was like, oh what the heck.”
## Panel Distribution

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Average In-Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34</td>
<td>30.7%</td>
</tr>
<tr>
<td>35-54</td>
<td>47.0%</td>
</tr>
<tr>
<td>55+</td>
<td>22.3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gender</th>
<th>Average In-Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>F</td>
<td>50.5%</td>
</tr>
<tr>
<td>M</td>
<td>49.5%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Race Ethnicity</th>
<th>Average In-Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>13.9%</td>
</tr>
<tr>
<td>H</td>
<td>16.0%</td>
</tr>
<tr>
<td>O</td>
<td>70.1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Phone Ownership</th>
<th>Average In-Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Both Android and BB</td>
<td>2.6%</td>
</tr>
<tr>
<td>Android Only</td>
<td>77.2%</td>
</tr>
<tr>
<td>BB Only</td>
<td>20.3%</td>
</tr>
</tbody>
</table>
About the Panel

» Average In-Tab for devices:
  • PPM meter—88%
  • Mobile meter—78%
  • PC meter—74%

» Three-screen average In-Tab rate of 60%
CIMM TV Member Participants

» Arbitron conducted 25 different individual projects for CIMM

» Participating media companies:

  • ABC
  • A&E
  • CBS
  • Discovery
  • ESPN
  • FOX
  • NBC
  • Turner
  • Viacom
Project 1: Broadcast and Cable TV Plus Popular Internet Sites

» Respondents who accessed any CIMM members’ content

» Major social media, search or email sites:
  • Facebook
  • Twitter
  • LinkedIn
  • GetGlue
  • Myspace.com
  • Google
  • or associated mobile apps
  • Foursquare
  • Gmail
  • Yahoo Mail
  • Hotmail
  • Bing
  • AOL e-mail

© 2012 Arbitron Inc. and the Coalition for Innovative Media Measurement
Panelists who accessed any CIMM members’ content

Major online video sites:

- Hulu
- Netflix
- VUDU
- YouTube
- or associated mobile apps
Reach Analysis
Sample Demonstration Data
Behavior Analysis
Sample Demonstration Data
Project 1: Cross-Platform Usage

» TV captured the most time spent with media—52%
» 46% of time on PC Internet
» 2% of time spent on mobile Internet

Source: CIMM Project 1, Jan 2012
The majority of users who viewed content on all three screens fell into the 35-49 age group.

Skewed more male than TV-only users.

Source: CIMM Project 1, Jan 2012
No panelist in this group used PC or mobile Internet content without also using TV.

Nearly all panelists (98%) were cross-platform users—used at least two screens.

Nearly two-thirds of the panel (60%) used all three screens to access content.

Source: CIMM Project 1, Jan 2012
Project 1: Social Media Usage

» 93% of users who viewed CIMM members’ TV content also visited Facebook.

» 87% of users who viewed CIMM members’ TV content visited OTHER popular social media sites (Twitter, LinkedIn, GetGlue, Myspace.com, Foursquare).

Source: CIMM Project 1–Jan 2012
Project 1: The More Screens Used, the More Time Spent With Media

The more screens used, the more time spent with media.

» In CIMM project 1, three-screen users spent 123% more time with media than TV-only users.

Source: CIMM Project 1–Jan 2012
“At-work” usage = registered PC as work or dual-use and location is OOH

- 35% of users access CIMM members’ content while “at work”
  - 71% used PC Internet content at-work
  - 14% used an App
  - 50% used Mobile Internet content at-work
  - 81% of at-work users viewed YouTube
  - 17% of at-work users viewed Netflix spending an average of over 3 hours
  - 12% viewed Hulu, spending an average of 90 minutes on the site

Source: CIMM Project 2–Jan 2012
“At-work” usage compared to at-home usage:

While time spent with CIMM members’ content at work is significant, it is generally a smaller percentage of time than is spent with CIMM content at home.

- Hulu was the one site in this project where users spent more time with content at-work than at home:
  - Average of 90 min. at work vs. 55 min. at home.

Source: CIMM Project 2–Jan 2012
Projects 1 & 2: Cross-Platform Usage

» Cross-platform usage varies significantly across projects.

» TV-only usage varies based on dual platform usage.

» Popular Internet sites drive PC and mobile reach in CIMP 1 & 2. TV-only reach is reduced, but not total TV reach.

Social, search, and email drive time spent with PC, mobile, and overall cross-platform usage:

» Total time spent with TV remains the same, but percentage of time spent declines from 90% to 52%.

» Time spent with PC increases from 9% to 46%.

» Time spent with Mobile increases from <1% to 2%.

Source: CMM Projects 1 & 2–Jan 2012
Social, search and email drive mobile and three-screen users:

- Mobile users jumps from 43% to 69%
- Three-screen users increases from 35% to 60%

Source: CIMM Projects 1 & 2–Jan 2012
### Project 1: Simultaneous Usage TV and Social Media

<table>
<thead>
<tr>
<th>Platform</th>
<th>Usage (h:mm)</th>
<th>Users With Simultaneous Usage</th>
<th>Usage% Simultaneous With TV</th>
<th>Usage% Simultaneous With PC</th>
<th>Usage% Simultaneous With Mobile</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>62:05</td>
<td>90%</td>
<td>—</td>
<td>11%</td>
<td>0.4%</td>
</tr>
<tr>
<td>PC</td>
<td>60:44</td>
<td>94%</td>
<td>12%</td>
<td>—</td>
<td>0.2%</td>
</tr>
<tr>
<td>Mobile</td>
<td>3:22</td>
<td>72%</td>
<td>10%</td>
<td>6%</td>
<td>—</td>
</tr>
</tbody>
</table>

Source: CIMM 1 Content, Usage in Population; Simultaneous Usage as Percent of All Usage, January 2012
Project 2: Simultaneous Usage TV and Video Sites

<table>
<thead>
<tr>
<th>Platform</th>
<th>Usage (h:mm)</th>
<th>Users with Simultaneous Usage</th>
<th>Usage% Simultaneous With TV</th>
<th>Usage% Simultaneous With PC</th>
<th>Usage% Simultaneous With Mobile</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>62:05</td>
<td>68%</td>
<td>—</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>PC</td>
<td>7:37</td>
<td>76%</td>
<td>10%</td>
<td>—</td>
<td>0.2%</td>
</tr>
<tr>
<td>Mobile</td>
<td>0:44</td>
<td>41%</td>
<td>9%</td>
<td>3%</td>
<td>—</td>
</tr>
</tbody>
</table>

Source: CIMM 2, Content, Usage in Population, Simultaneous Usage as Percent of All Usage, January 2012
What Did We Learn?

» Communication
  • Explicit direct communications work best.
  • Panelists will respond to a reward for installing on a deadline.

» Rewards
  • If you want three-screen don’t reward a panelist for two-screen.

» Technical
  • Smartphones and PCs will have constant operating system upgrades
  • The technology landscape is rapidly evolving, and meters must stay ahead of the curve.
Conclusions

» Three-screen audience measurement is in its infancy.

» Editing and processing rules are evolving and would benefit from industry consensus.

» Consumers are rapidly adopting new technologies; the definition of cross-platform will consistently evolve.

» Single-source cross-platform data are critical to future scalable solutions as a calibration tool.

» The value of cross-platform measurement is dependent on adoption in the planning and buying ecosystem.
Scaling Multiscreen Measurement: Hybrid Approach
Arbitron and CIMM
Single-Source, Three-Screen Audience Measurement Pilot Reveal

Jane Clarke
Managing Director
CIMM
(Coalition for Innovative Media Measurement)

Carol Frost
Vice President Product Management
Arbitron Inc.