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

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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

Our Members

Cross-Platform Measurement

Plan → **Verify Exposure** → **Evaluate Effectiveness & ROI**

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

BlackBerry is registered trademark and Android is a trademark

Building the Panel—A Four-Step Process

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

Building the Panel—A Four-Step Process

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

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Panelists' Website and Online Instructions

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
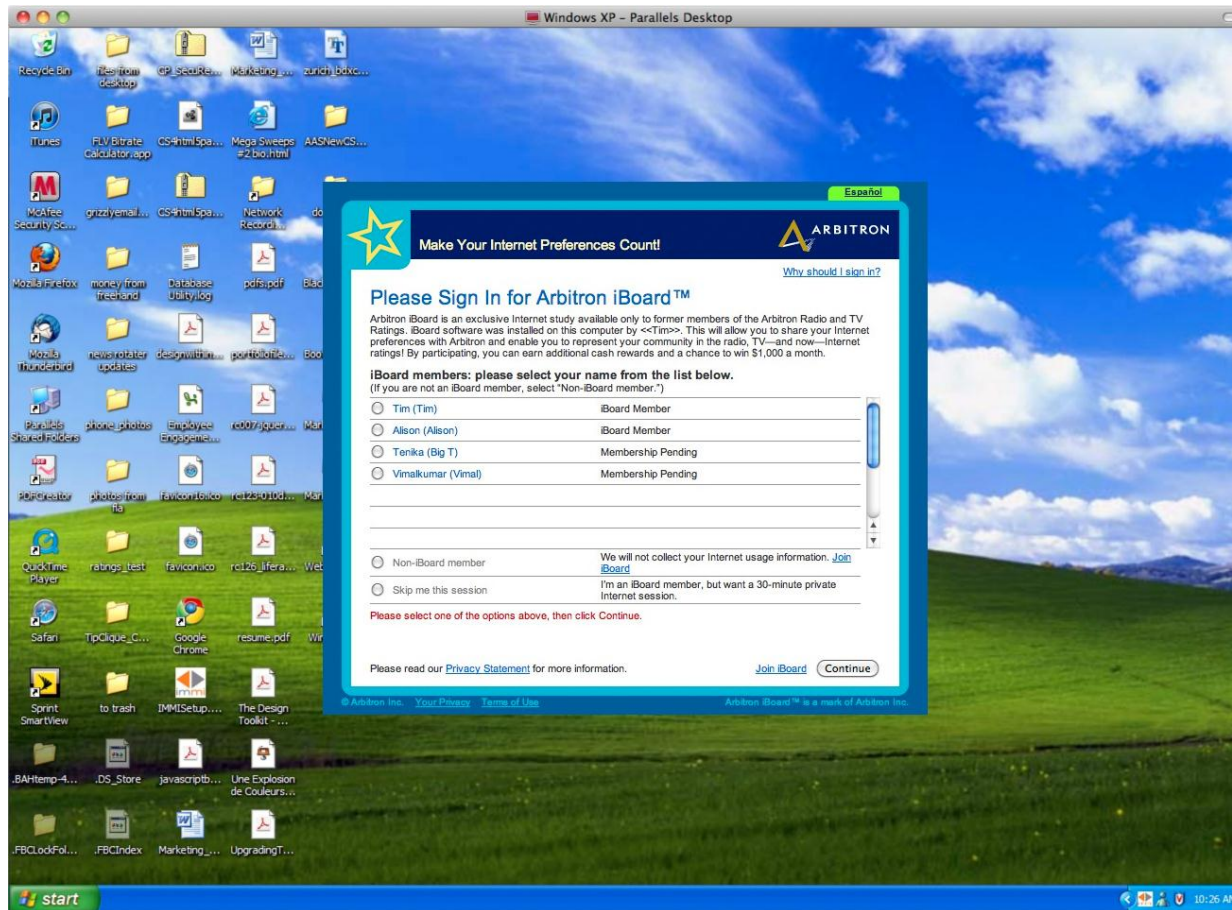
Addressing Privacy

» **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

Age Group	Average In-Tab
18-34	30.7%
35-54	47.0%
55+	22.3%

Gender	Average In-Tab
F	50.5%
M	49.5%

Race Ethnicity	Average In-Tab
B	13.9%
H	16.0%
O	70.1%

Phone Ownership	Average In-Tab
Both Android and BB	2.6%
Android Only	77.2%
BB Only	20.3%

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

Project 2:
Broadcast and Cable TV Plus Online Video Sites

» **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
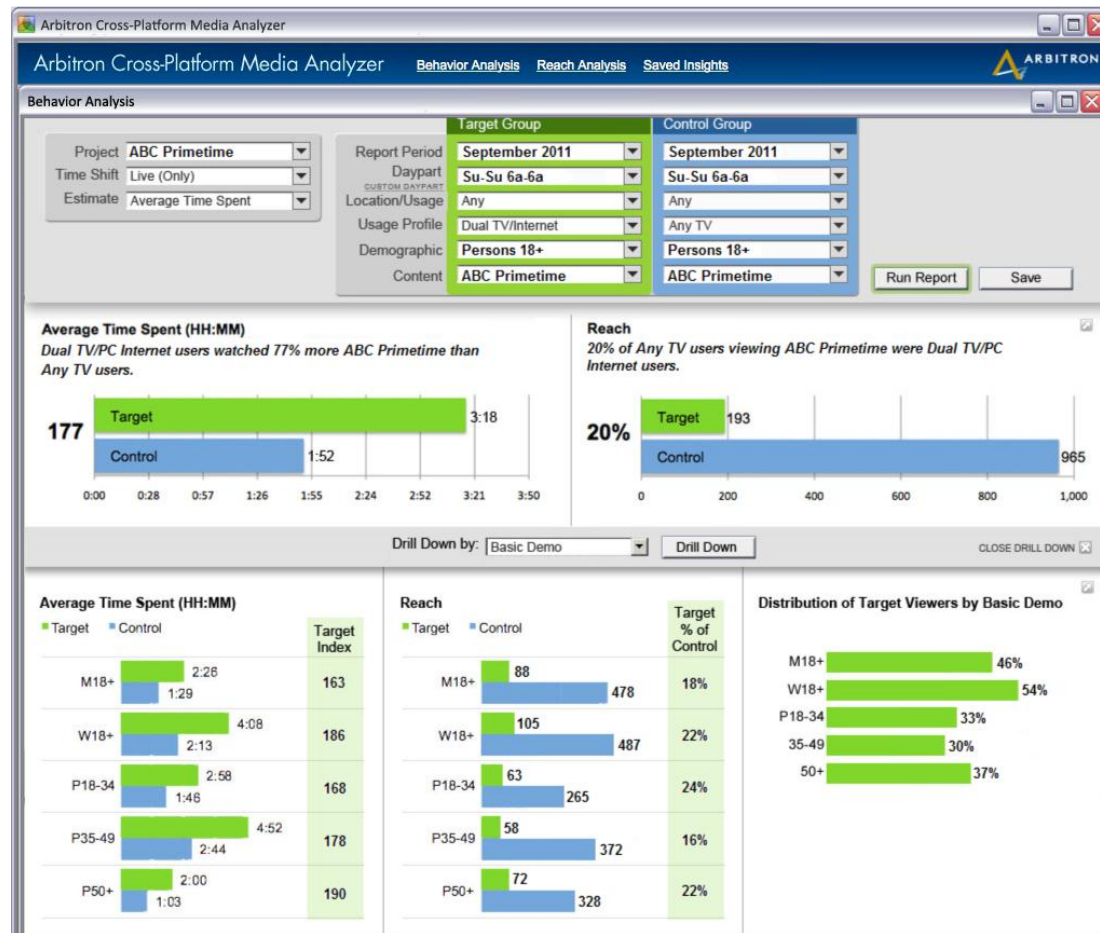
Project 1:
Cross-Platform Usage

» TV captured the most time spent with media—52%

» 46% of time on PC Internet

» 2% of time spent on mobile Internet

Total Viewing Time by Media/Location
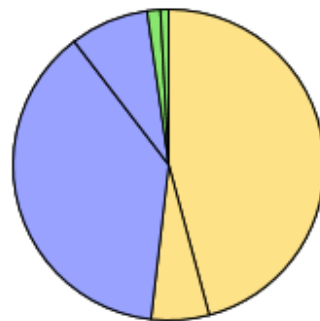
TV, In Home 45.8%, 30976 hrs		
TV, Out of Home 6%, 4069 hrs		
PC, In Home 37.8%, 25542 hrs		
PC, Out of Home 8.2%, 5526 hrs		
Mobile, In Home 1.4%, 927 hrs		
Mobile, Out of Home 0.9%, 575 hrs		

TV, All	PC, All	Mobile, All
51.8%, 35046 hrs	45.9%, 31068 hrs	2.2%, 1503 hrs

Source: CIMM Project 1, Jan 2012

Project 1:
Three-Screen Users

» 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
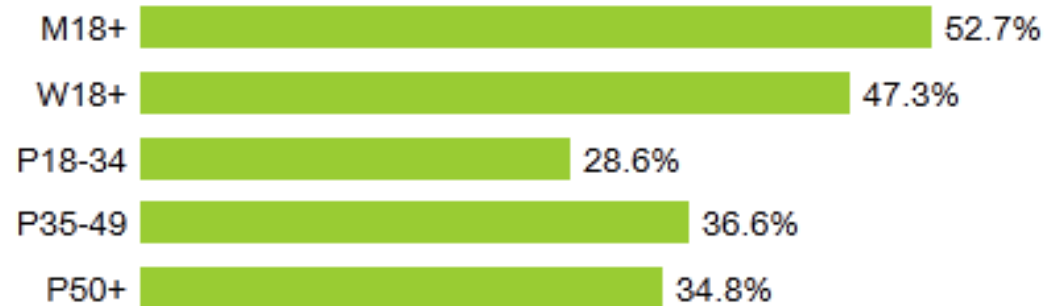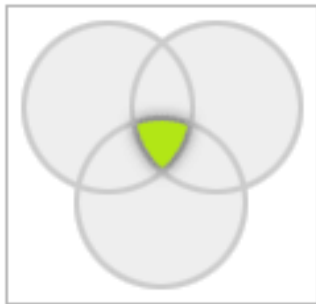
Source: CIMM Project 1, Jan 2012

Project 1:
Cross-Platform Users

» 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.

Viewer Distribution by Media/Location
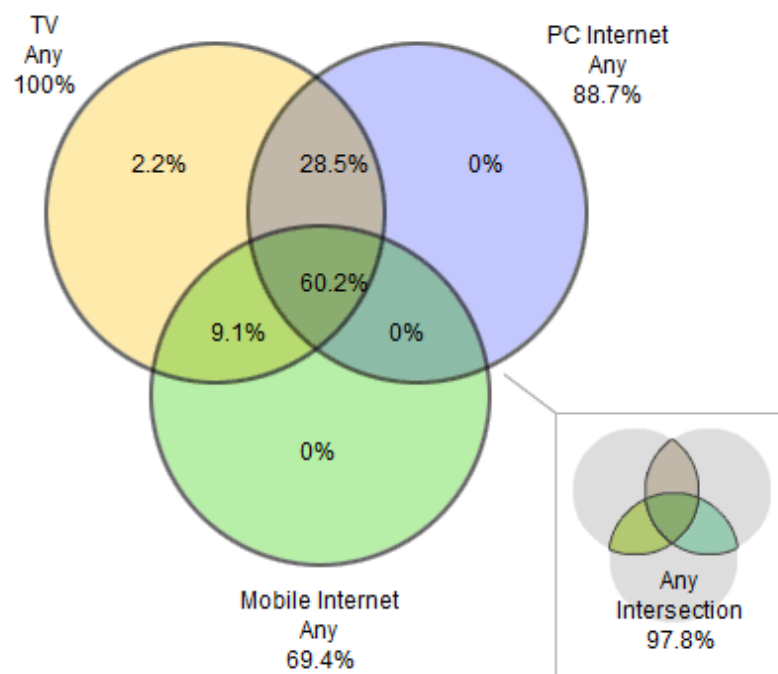
Source: CIMM Project 1, Jan 2012

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).
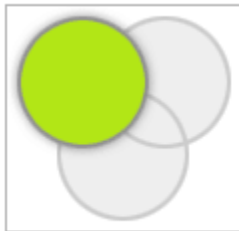
Distribution of Any TV Any Viewers by Content

Content	Percentage
Any	100%
Any App	43.8%
Any Mobile	69.4%
Any Online	97.8%
Any PC	88.7%
CIMM Sites OIn	75.8%
CIMM TV	100%
Web: Facebook	93.3%
Web: Mail	84.1%
Web: Search	97.6%
Web: Social	86.8%
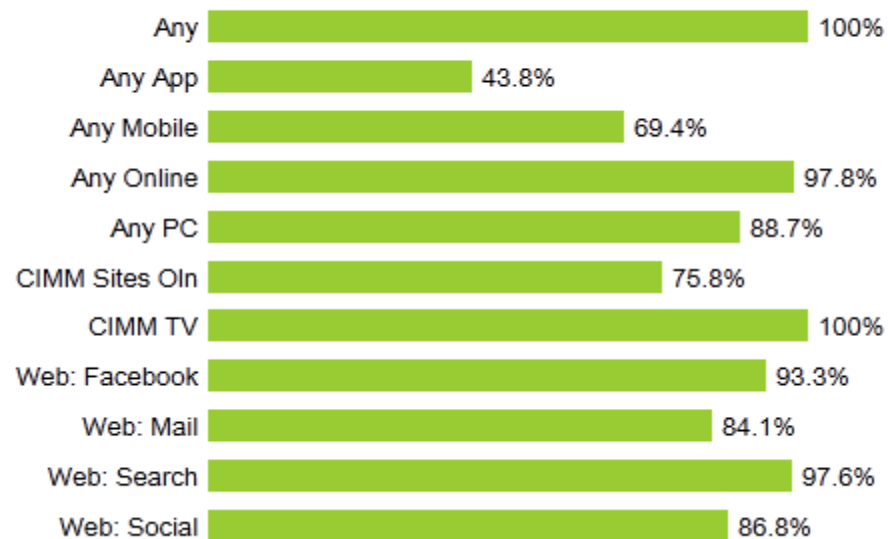
Source: CIMM Project 1–Jan 2012

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.

Average Time Spent (HH:MM)

223	Target	3-Screen — 133:09
	Control	TV-Only — 59:48*

0:00 16:40 33:20 50:00 66:40 83:20 100:00 116:40 133:20
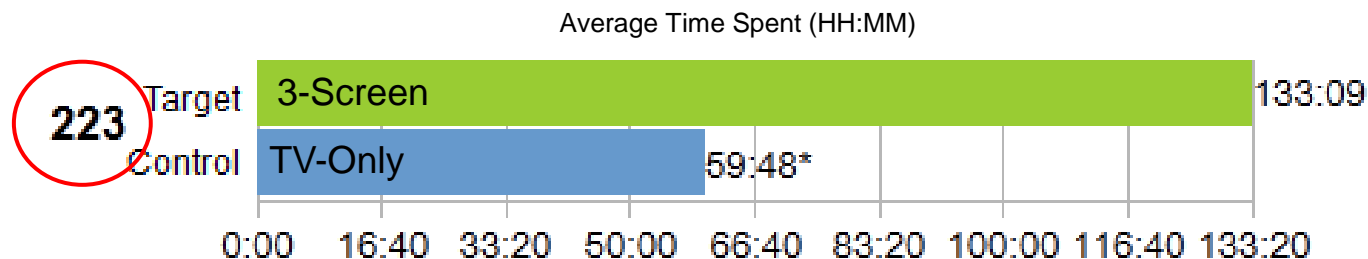
Source: CIMM Project 1–Jan 2012

Project 2:
"At-Work" Usage

"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

Distribution of Target viewers by Content

Content	%
Any	100.0%
Any App	13.7%
Any Mobile	50.4%
Any Online	100.0%
Any PC	71.0%
CIMM Sites Oln	68.7%
CIMM TV	0.0%
Web: Hulu	11.5%
Web: Netflix	16.8%
Web: VUDU	0.0%
Web: YouTube	80.9%
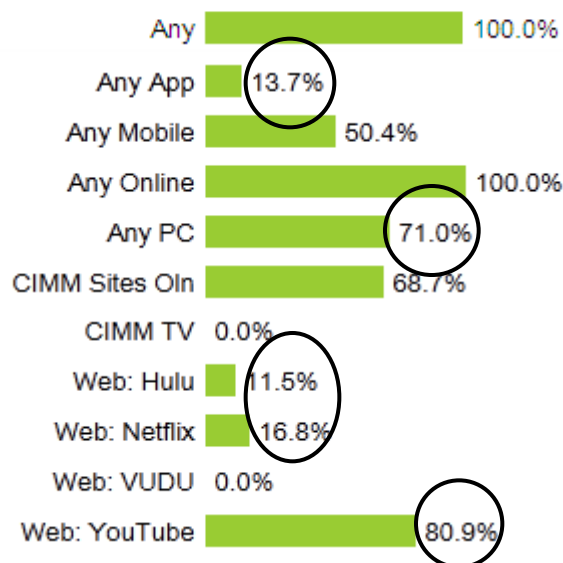
Source: CIMM Project 2–Jan 2012

Project 2:
"At-Work" vs. At-Home Usage

"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.*

Average Time Spent (HH:MM)

	Target	Control
Any	2:43	61:38
Any App	0:15	0:30
Any Mobile	0:20	0:51
Any Online	2:43	8:05
Any PC	3:35	8:28
CIMM Sites Oln	1:13	2:47
CIMM TV	NA*	54:49
Web: Hulu	1:33	0:55
Web: Netflix	3:14	5:03
Web: VUDU	NA*	0:09*
Web: YouTube	1:25	4:16

Source: CIMM Project 2–Jan 2012

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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 CIMM 1 & 2. TV-only reach is reduced, but not total TV reach.

Platform Reach as a % of Three-month average In-Tab

Legend:
- TV Only
- TV/PC
- PC Only
- TV/Mobile
- Mobile/PC
- Mobile Only

Network 2: 68%, 4%, 2%, 1%, 0%, 0%
Network 1: 60%, 15%, 1%, 15%, 6%, 0%
Network 3: 34%, 16%, 10%, 6%, 5%, 3%
CIMM2: 9%, 82%, 0%, 46%, 37%, 0%
CIMM1: 3%, 87%, 0%, 72%, 62%, 0%
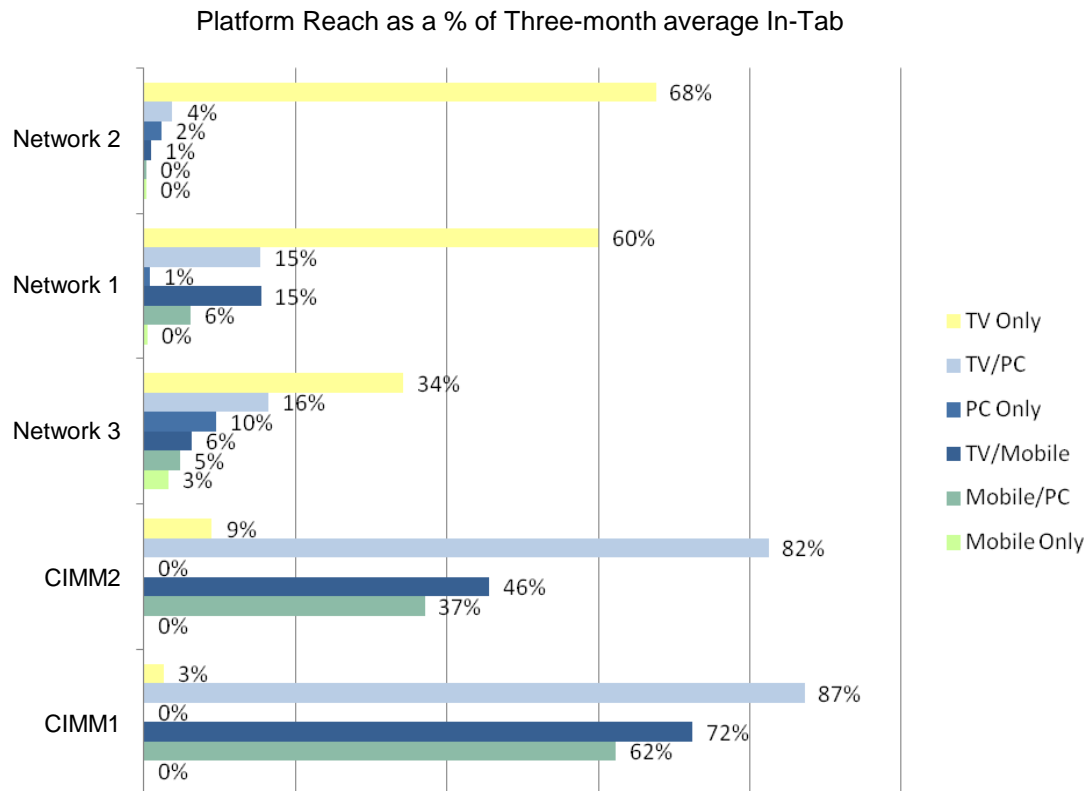
Source: CIMM Project 1 & 2, Nov. 2011, Dec. 2011, Jan. 2012 Data

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%.

CIMM Project 1

Total Viewing Time by Media/Location
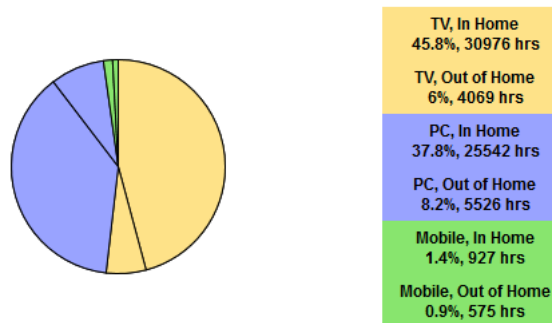
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| PC, In Home 37.8%, 25542 hrs |
| PC, Out of Home 8.2%, 5526 hrs |
| Mobile, In Home 1.4%, 927 hrs |
| Mobile, Out of Home 0.9%, 575 hrs |

| TV, All 51.8%, 35046 hrs | PC, All 45.9%, 31068 hrs | Mobile, All 2.2%, 1503 hrs |

CIMM Project 2

Total Viewing Time by Media/Location
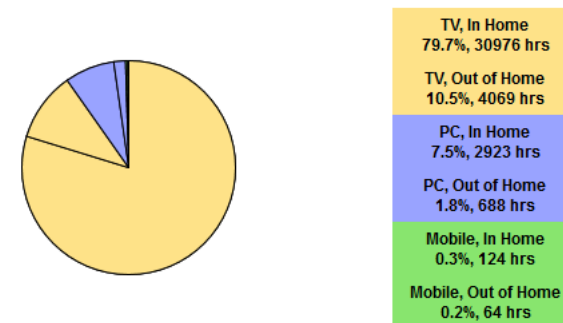
| TV, In Home 79.7%, 30976 hrs |
| TV, Out of Home 10.5%, 4069 hrs |
| PC, In Home 7.5%, 2923 hrs |
| PC, Out of Home 1.8%, 688 hrs |
| Mobile, In Home 0.3%, 124 hrs |
| Mobile, Out of Home 0.2%, 64 hrs |

| TV, All 90.2%, 35046 hrs | PC, All 9.3%, 3612 hrs | Mobile, All 0.5%, 188 hrs |

Source: CIMM Projects 1 & 2–Jan 2012

Social, search and email drive mobile and three-screen users:

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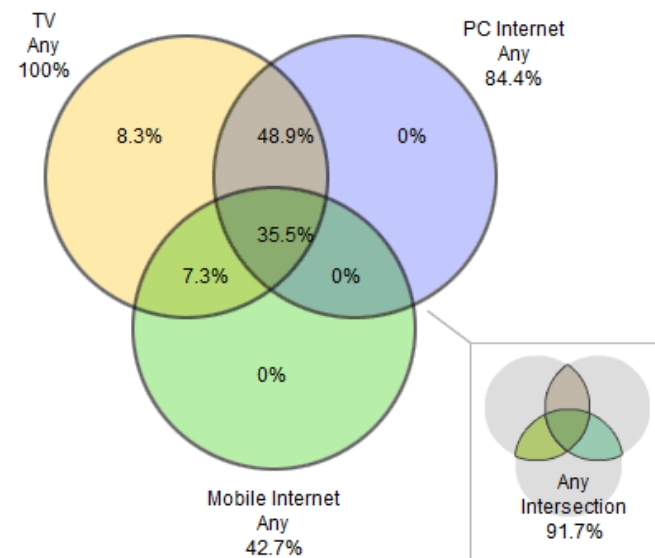
» Three-screen users increases from 35% to 60%

CIMM Project 1

CIMM Project 2)

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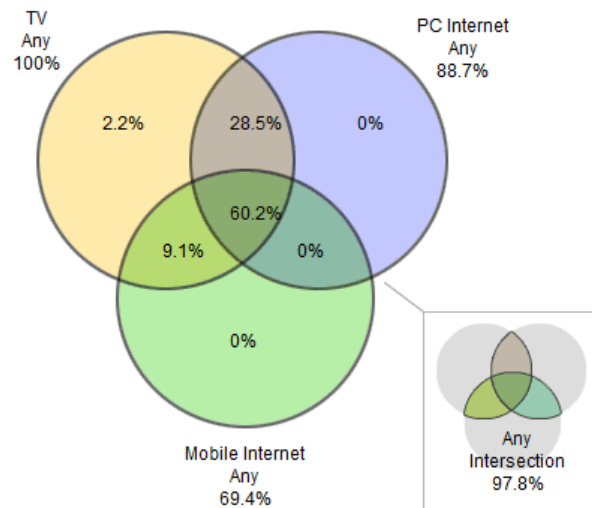
Project 1:
Simultaneous Usage TV and Social Media

Platform	Usage (h:mm)	Users With Simultaneous Usage	Usage% Simultaneous With TV	Usage% Simultaneous With PC	Usage% Simultaneous With Mobile
TV	62:05	90%	—	11%	0.4%
PC	60:44	94%	12%	—	0.2%
Mobile	3:22	72%	10%	6%	—

Source: CIMM 1 Content, Usage in Population; Simultaneous Usage as Percent of All Usage, January 2012

Project 2:
Simultaneous Usage TV and Video Sites

Platform	Usage (h:mm)	Users with Simultaneous Usage	Usage% Simultaneous With TV	Usage% Simultaneous With PC	Usage% Simultaneous With Mobile
TV	62:05	68%	—	1%	0%
PC	7:37	76%	10%	—	0.2%
Mobile	0:44	41%	9%	3%	—

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
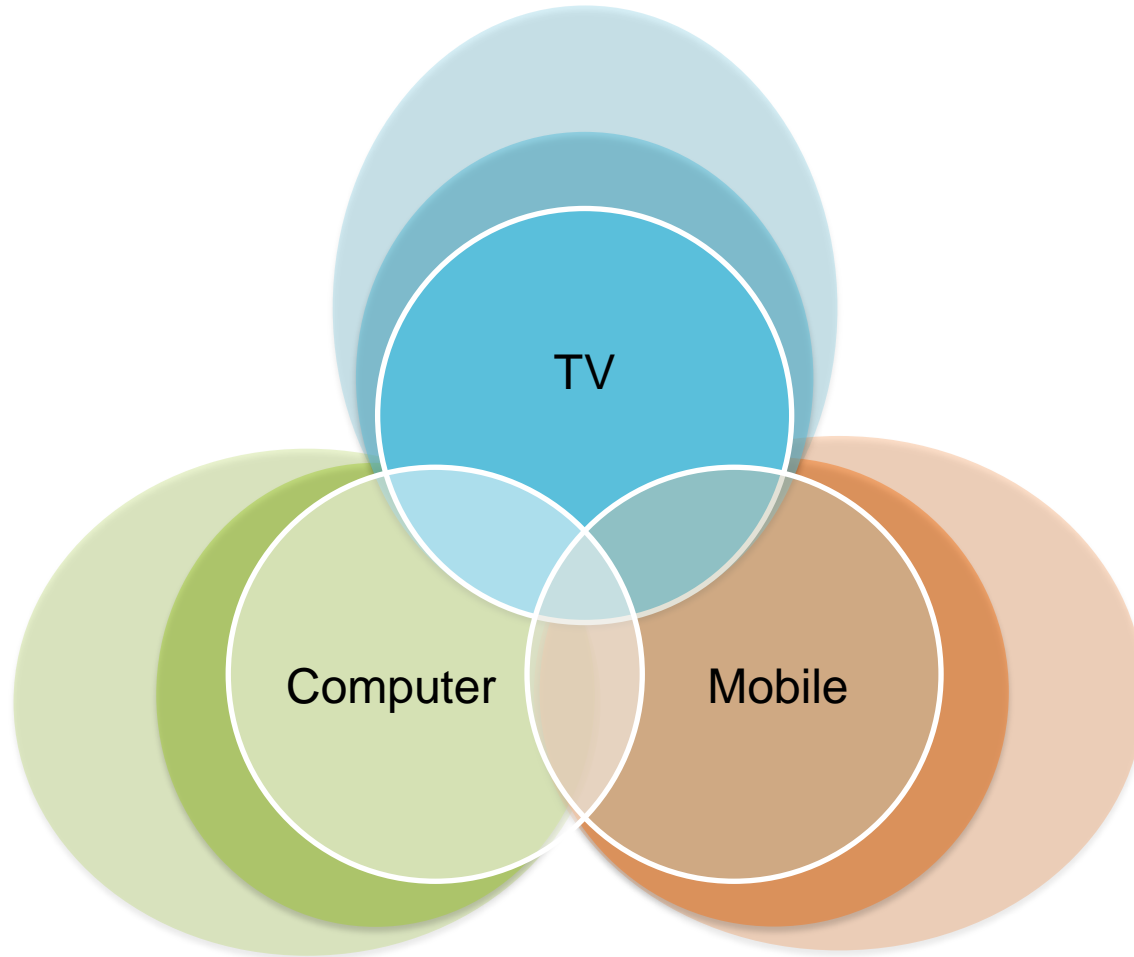
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