#### CROSS-MEDIA MEASUREMENT-



Where do we go from here?



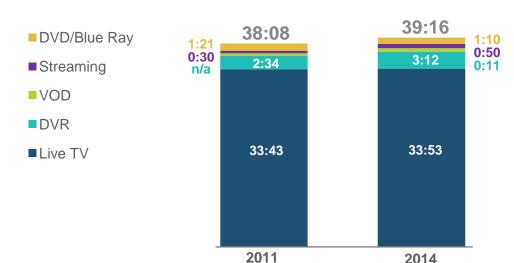
# The Changing Way People Watch Television

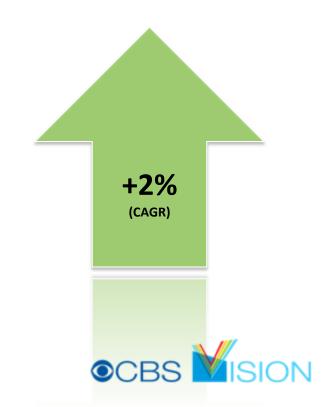




## **Engagement with TV/Video is Growing**

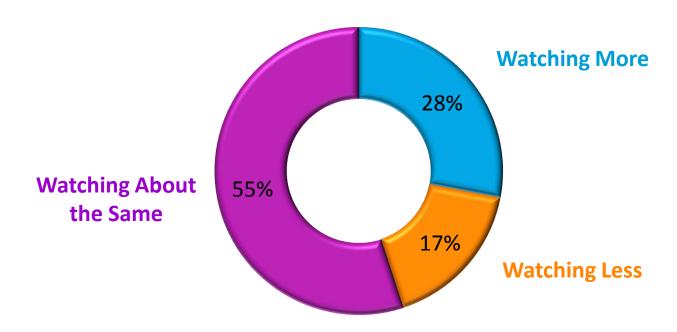
#### TV/Video Program Viewing Hours Weekly





Source: Nielsen Cross Platform Report, Q4 2014 vs. 2011

## **Engagement with TV/Video is Growing**





## **Engagement with TV/Video is Growing**

#### **Share of TV/Video Program Viewing Hours**







## VIEWERS ARE ENGAGING WITH CONTENT IN NEW WAYS THAT RESHAPE THE OVERALL EXPERIENCE



84% enjoy watching multiple episodes of a show in a row

<u>81%</u> often watch older episodes of a show to catch up





<u>56%</u> have used another device while watching to research/ purchase something seen on TV

<u>29%</u> enjoy shows that have an interactive social component



39% get or share ideas about TV with online social networks

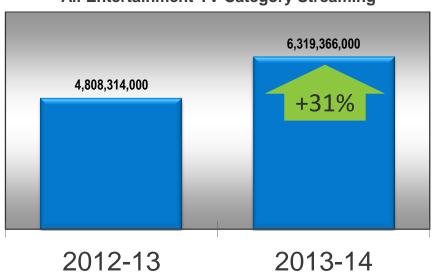
20% interact regularly with favorite TV programs on Social Media\*



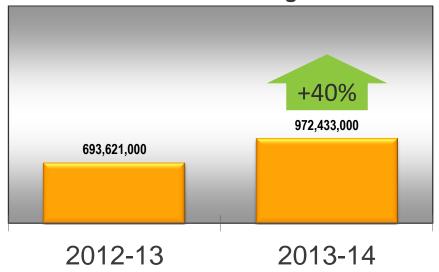
#### ONLINE STREAMING GROWTH

2012-13 SEASON-TO-DATE VS. YEAR AGO

#### **All Entertainment-TV Category Streaming**



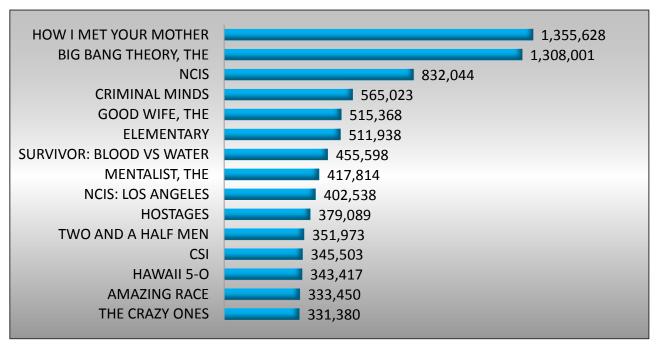
#### **CBS Streaming**





#### **CBS ONLINE STREAMING – TOP 15**

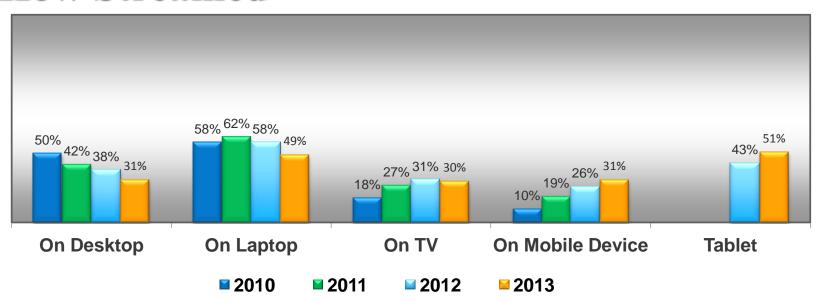
**2013-14 SEASON-TO-DATE** 





# TV Program Streaming

#### **How Streamed**





# MEDIAN AGE – ONLINE VS. TELEVISION 2013-14 SEASON-TO-DATE

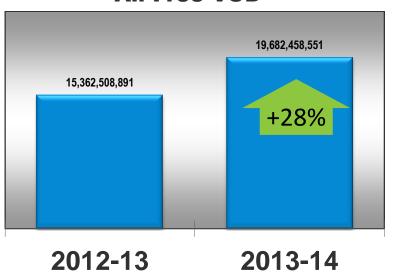
Program	Online	TV	Difference
The Mentalist	37	60	-23
The Amazing Race	32	54	-22
Elementary	37	56	-19
The Big Bang Theory	32	51	-19
The Crazy Ones	37	54	-17
Hawaii Five-0	42	59	-17
How I Met Your Mother	27	44	-17
Survivor	37	53	-16
Mom	37	51	-14
The Good Wife	47	61	-14
Hostages	42	55	-13
2 Broke Girls	37	50	-13
NCIS	47	60	-13
NCIS:LA	47	60	-13
Criminal Minds	42	55	-13
Person of Interest	47	60	-13
Undercover Boss	47	59	-12
Blue Bloods	52	62	-10
CSI	47	57	-10
Two And A Half Men	47	53	-6



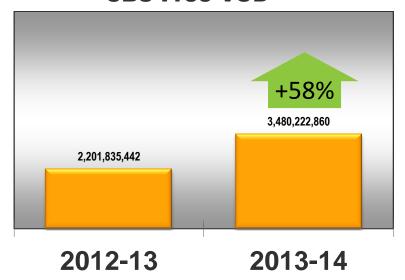
Source: CBSI Internal Data; CBS/CAN Video Data; Nielsen NPM

#### VIDEO ON DEMAND GROWTH 2013-14 SEASON-TO-DATE VS. YEAR AGO

#### **All Free VOD**

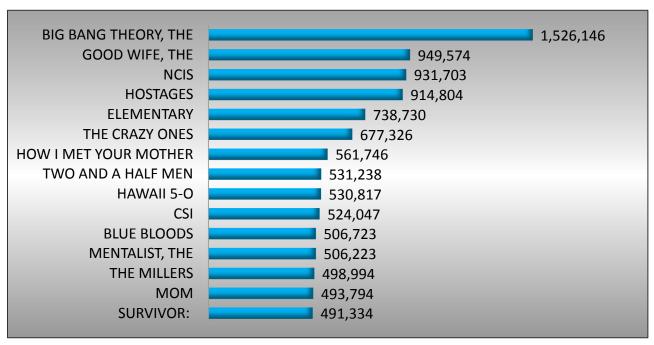


#### **CBS Free VOD**





#### CBS VOD TRANSACTIONS – TOP 15 2013-14 SEASON-TO-DATE





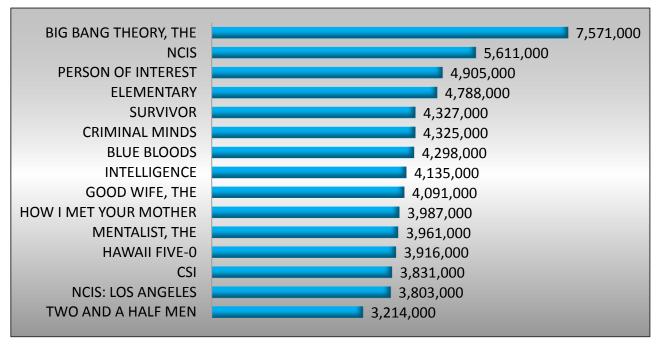
#### VOD HAS AN UPSCALE AUDIENCE PROFILE

	Linear TV		Non-Linear VOD	
Median Age (2+)	59		51	
Median Income (HH) \$	\$49,900		\$68,100	
TOTAL US	Rating 5.2	Index 100	Rating 0.18	Index 100
\$75,000+ HH Income	4.8	92	0.25	139
\$100,000+ HH Income	4.5	87	0.27	150
\$100K+/Professional, Owner, Manger	3.7	71	0.24	133
\$100K+/HH with Some College	4.4	85	0.27	150
\$100K+/HH with Children	3.0	58	0.22	122



Source: Nielsen NPM, CBS Primetime, 9/23/13-3/23/14; Live+ 3 Data

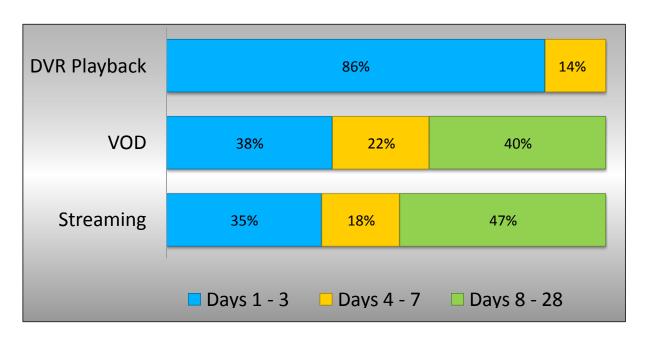
#### CBS DVR PLAYBACK – TOP 15 2013-14 SEASON-TO-DATE





#### **Non-Linear Viewing Timeline**

CBS Primetime - 2013-14 Season-to-Date





# On Demand Commercial Ratings

COMCAST VOICES | A PLACE FOR CONVERSATIONS WITH COMCAST

DEC 2, 2013 **Episodes: Psych** xfinity. COMCAST AND NIELSE COLLABORATE TO - Season 7 (5) Ep16 "Psych: The Musical" **FURTHER MONETIZ** XOD TIMESHIFTED Ep15 "No Trout About It" XOD Psych TELEVISION Ep14 "Nip and Suck It" XOD S7 Ep16 "Psyc XFINITY On Den 44 min CE EXES Ep13 "Dead Air" XOD Ep12 "Office Space" XOD Harvey puts his merger from goi from the other fi Ep11 "Santa Barbarian Can..." XOD Ep10 "Juliet Wears the Pan..." XOD

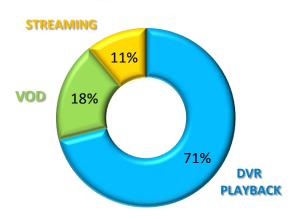


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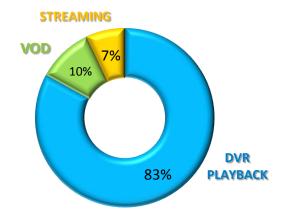
#### **Non-Linear Viewing Timeline**

CBS Primetime - 2013-14 Season-to-Date

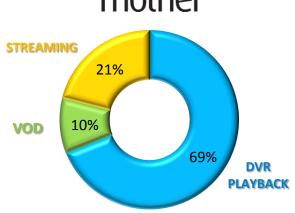
#### the**goodwife**



#### **ELEMENTARY**























# MEDIA DEMAND LANDSCAPE 2014

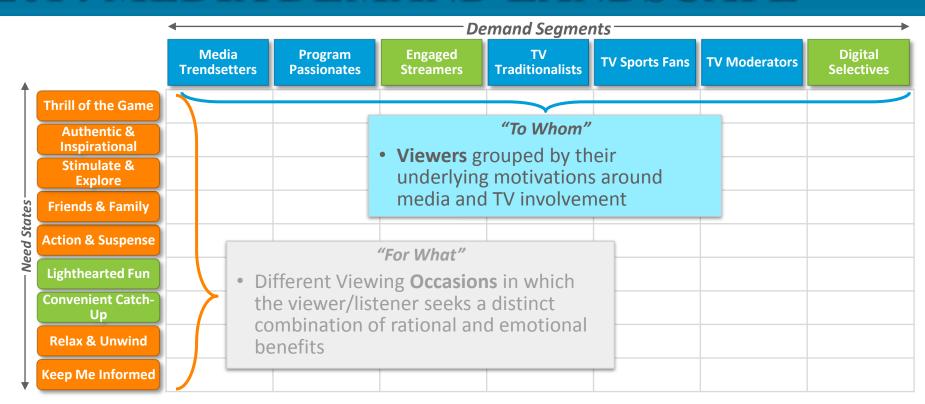
**INSIGHTS AND OPPORTUNITIES** 







#### 2014 MEDIA DEMAND LANDSCAPE



# SEVEN DEMAND SEGMENTS DEFINE THE RANGE OF MEDIA ENGAGEMENT AND VIEWER PREFERENCES

2014 Media Demand Segments – "To Whom"



Media Trendsetters
20%/43 hrs.
Early adopters of content
and technology; social
diffusers



Program Passionates
15%/38 hrs.
Dedicated to high
quality shows; time shift
to keep up



Engaged Streamers 13%/38 hrs. Enjoy streaming TV and sharing via social media



TV Traditionalists
15%/41 hrs.
Love traditional TV and regularly follow favorite programs



TV Sports Fans 14%/42 hrs. TV interest is anchored in sports and competition

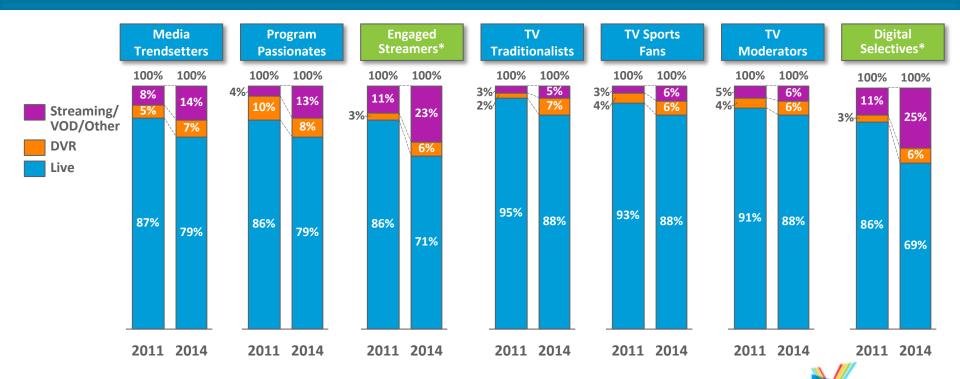


TV Moderators
11% / 26 hrs.
Limited engagement with
TV – news and information
focused



Digital Selectives
12% / 27 hrs.
Little engagement with TV
programs; prefer streaming
when do watch

#### VIEWING BEHAVIORS HAVE SHIFTED BROADLY



Note\*: Change vs. Streamers

Source:

Cambridge/Nielsen 2011 Media Demand Landscape; Cambridge/Nielsen 2014 Media Demand Landscape











# The Advertiser Perspective



#### PROGRAMMATIC MARKETING

From Wikipedia, the free encyclopedia:

In <u>digital marketing</u>, **programmatic marketing** campaigns are automatically triggered by any type of event and deployed according to a set of rules applied by software and <u>algorithms</u>. Human skills are still needed in programmatic campaigns as the campaigns and rules are planned beforehand and established by marketers









#### REAL-TIME BIDDING

From Wikipedia, the free encyclopedia:

Jump to: <u>navigation</u>, <u>search</u>

Real-time bidding (RTB) refers to the means by which ad inventory is bought and sold on a perimpression basis, via programmatic instantaneous auction, similar to financial markets. With real-time bidding, advertising buyers bid on an impression and, if the bid is won, the buyer's ad is instantly displayed on the publisher's site. Real-time bidding lets advertisers manage and optimize ads from multiple ad-networks by granting the user access to a multitude of different networks, allowing them to create and launch advertising campaigns, prioritize networks and allocate backfill percentages [clarify].











# HARNESSING THE FULL POWER OF TELEVISION ADVERTISING

- Re-tool Marketing and Media Mix Models
- Measure Long term Advertising Effects
- Improve targeting
- Measure the Message
- Dynamic ROI Tracking
- Pre-testing
- Adaptive Models







# CBS LOCAL CROSS-MEDIA MEASUREMENT

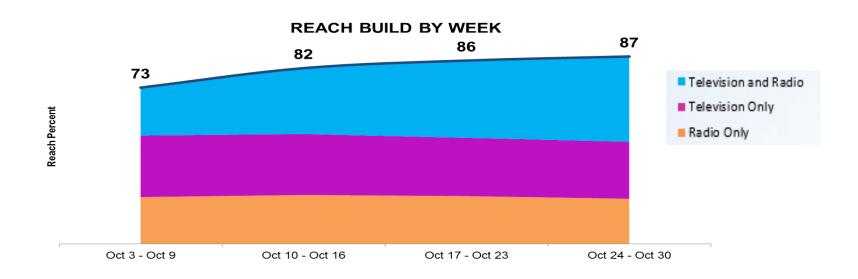


# PROOF OF CONCEPT: INITIAL FINDINGS





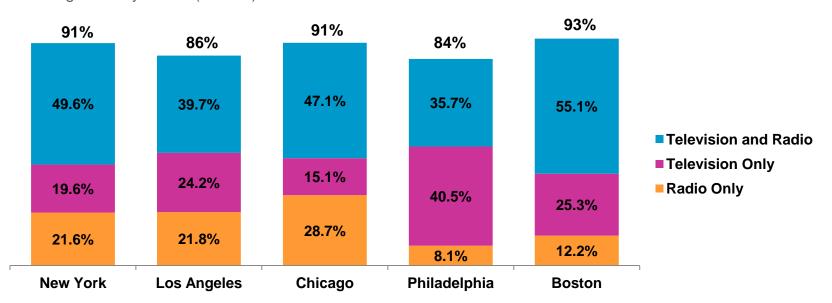
### BETTER TOGETHER: IN LOS ANGELES, NEARLY TWICE THE REACH FROM COMBINING CBS RADIO AND LOCAL TELEVISION





# CBS LOCAL TELEVISION AND RADIO TOGETHER PROVIDE UNMATCHED REACH!

Average Weekly Reach (A25-54):









## THANK YOU

