



&

**Project  
Blueprint**



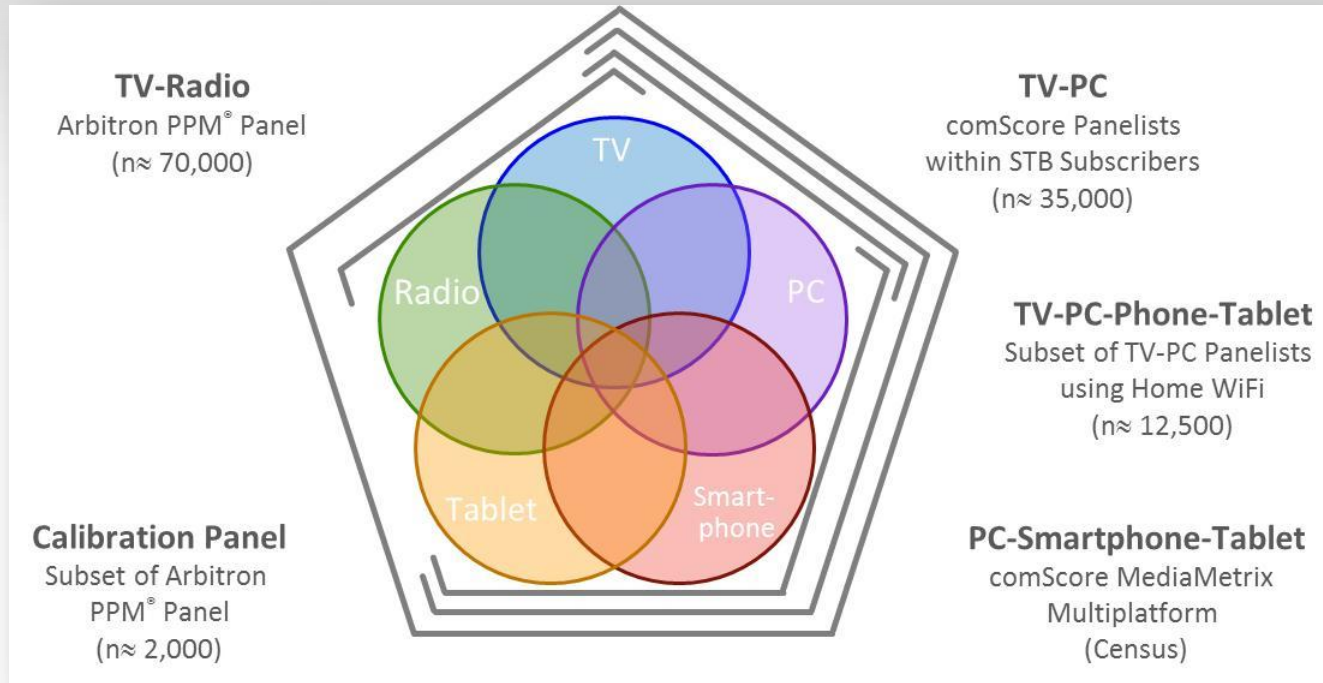
# From Custom Project to Standard Practice



April 24, 2014



# Measuring Duplication Across Five Platforms



# February 2014: FTC Settles Nielsen-Arbitron Merger



FEDERAL TRADE COMMISSION  
PROTECTING AMERICA'S CONSUMERS

## FTC Seeks Public Comment on Nielsen Holdings N.V. and Nielsen Audio, Inc.'s Application to Sell Its LinkMeter Technology and Related Assets to comScore, Inc.

FOR YOUR INFORMATION

January 24, 2014

TAGS: Technology | Bureau of Competition | Competition | Merger

The Federal Trade Commission is seeking public comment on an application by Nielsen Holdings N.V. and Nielsen Audio, Inc. (collectively, Nielsen) requesting FTC approval to sell its LinkMeter cross-platform audience measuring services to comScore, Inc., and to enter other arrangements supporting the divestiture. The divestiture is required under the proposed FTC order settling charges that Nielsen's acquisition of Arbitron, Inc. would lessen competition in cross-platform audience measurement services.

According to the FTC's September 2013 complaint, at the time of the acquisition, Nielsen and Arbitron were both developing national syndicated cross-platform audience measurement services, which allow audiences to be measured accurately across multiple viewing platforms, such as TV and online. The complaint alleges that the elimination of future competition between Nielsen and Arbitron in this market would increase the likelihood that Nielsen would exercise market power and likely cause advertisers, ad agencies, and programmers to pay more for national syndicated cross-platform audience measurement services.

The proposed order requires Nielsen to sell and license, for at least eight years, certain assets related to Arbitron's cross-platform audience measurement services to an FTC-approved buyer. Accordingly, in its petition Nielsen is seeking FTC approval to divest the LinkMeter assets, license certain assets and capabilities, and provide equipment and services, to comScore. The petition details why Nielsen believes that comScore would be an appropriate party to acquire these assets.



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## FTC Puts Conditions on Nielsen's Proposed \$1.26 billion Acquisition of Arbitron

FTC Order Protects Competition for National Syndicated Cross-platform Audience Measurement Services

FOR RELEASE

September 20, 2013

TAGS: Technology | Bureau of Competition | Competition | Merger | Horizontal

[corrected]

Media research company Nielsen Holdings N.V. has agreed to settle Federal Trade Commission charges that its proposed acquisition of Arbitron Inc. may substantially lessen competition. Nielsen will divest and license assets and intellectual property needed to develop national syndicated cross-platform audience measurement services.

Nielsen and Arbitron are developing national syndicated cross-platform audience measurement services, which allow audiences to be measured accurately across multiple platforms, such as TV and online. According to the FTC's complaint, the elimination of future competition between Nielsen and Arbitron would likely cause advertisers, ad agencies, and programmers to pay more for national syndicated cross-platform audience measurement services.

"Effective merger enforcement requires that we look carefully at likely competitive effects that may be just around the corner," said FTC Chairwoman Edith Ramirez. "In this matter, the evidence provided us with a strong reason to believe that absent a remedy, the deal was likely to harm emerging competition in the area of cross-platform audience measurement."

The proposed order settling the FTC's complaint is designed to address the competitive concerns raised by Nielsen's acquisition of Arbitron. It requires Nielsen to sell and license, for at least eight years, certain assets related to Arbitron's cross-platform audience measurement services to an FTC-approved buyer, within three months. Under the order, the acquirer will get everything it needs to replicate Arbitron's participation in a national



FEDERAL TRADE COMMISSION  
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## FTC Approves Final Order Settling Charges that Nielsen Holdings N.V.'s Acquisition of Arbitron, Inc. Was Anticompetitive

FOR YOUR INFORMATION

February 26, 2014

TAGS: Bureau of Competition | Competition

Following a public comment period, the Federal Trade Commission has approved a final consent order settling charges that Nielsen Holdings N.V.'s acquisition of Arbitron, Inc. was anticompetitive.

According to the FTC's September 2013 complaint, at the time of the acquisition, Nielsen and Arbitron were both developing national syndicated cross-platform audience measurement services, which allow audiences to be measured accurately across multiple viewing platforms, such as TV and online. The complaint alleges that the elimination of future competition between Nielsen and Arbitron in this market would increase the likelihood that Nielsen would exercise market power and likely cause advertisers, ad agencies, and programmers to pay more for national syndicated cross-platform audience measurement services.

The final order settling the FTC's charges requires Nielsen to sell and license, for at least eight years, certain assets related to Arbitron's cross-platform audience measurement services to an FTC-approved buyer. The FTC is currently seeking public comment on Nielsen's request for agency approval to sell its LinkMeter technology and related data rights and assets to comScore, Inc.

The Commission vote approving the final consent order was 2-1-1, with Commissioner Wright voting no and Commissioner Ohlhausen recorded as recused. One comment was received during the public comment period and the FTC staff sent a response posted [here](#) (FTC File No. 131-0058; the staff contact is Catherine Sanchez, Bureau of Competition, 202-326-3326).

ESPN

# Getting Some Press

## Cross-Platform Measurement's Leap Forwards

ESPN's "Project Blueprint"  
Measures Consumer Usage  
In New and Revealing Way

## Cross-Platform Measurement... How ESPN is Moving the Chains

Project Blueprint Shows ESPN  
Improving Digital Traffic

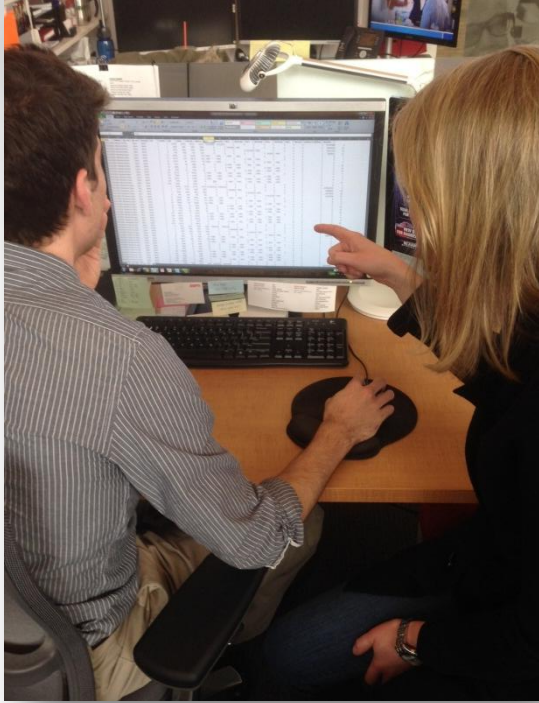
**"Measurement is the biggest issue that will influence  
the rate of growth for multi-screen advertising,"**

said Bill Duggan, Group Executive Vice President of the ANA.





# We've Been Working Hard ...

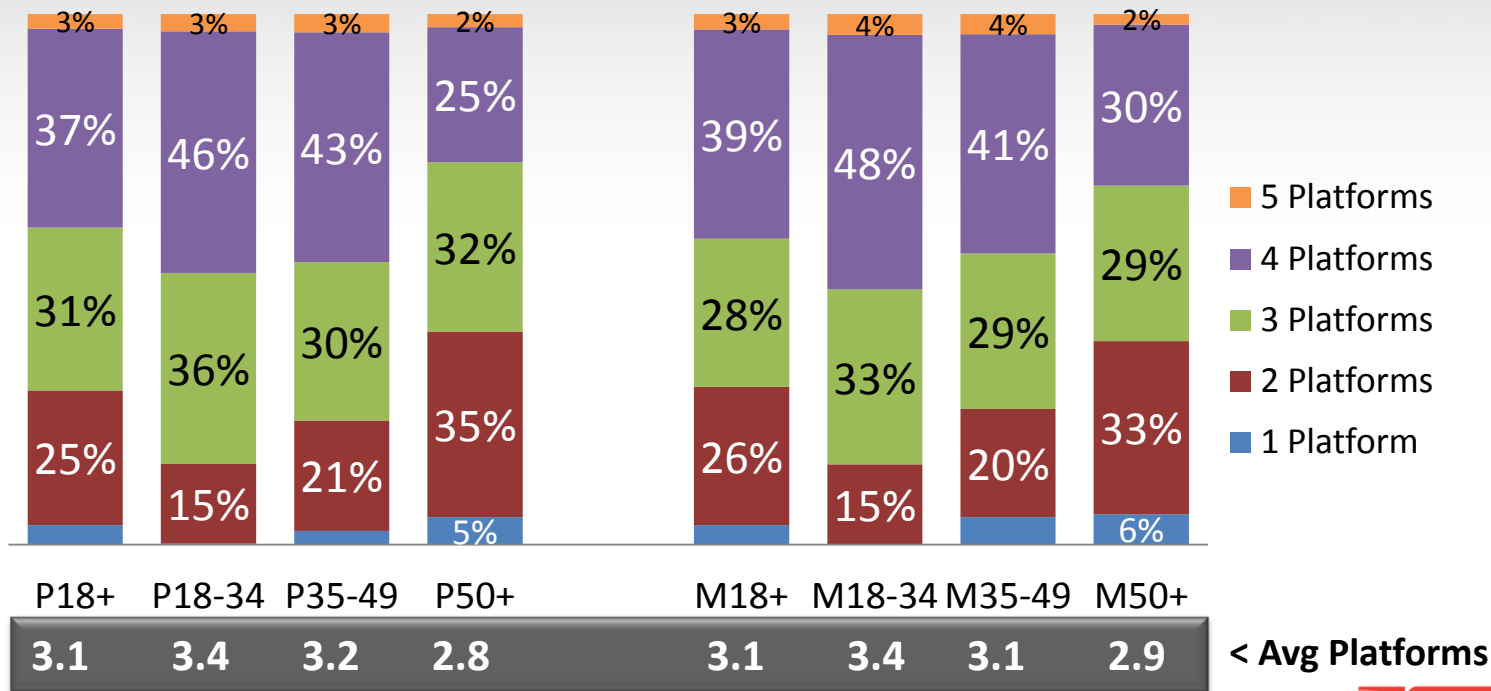


- Agreement for Continued Delivery of Project Blueprint Data
- Continuing QA work with comScore
- Participating with other CIMM members in Phase 2

# All Media Users Are Multiplatform Users

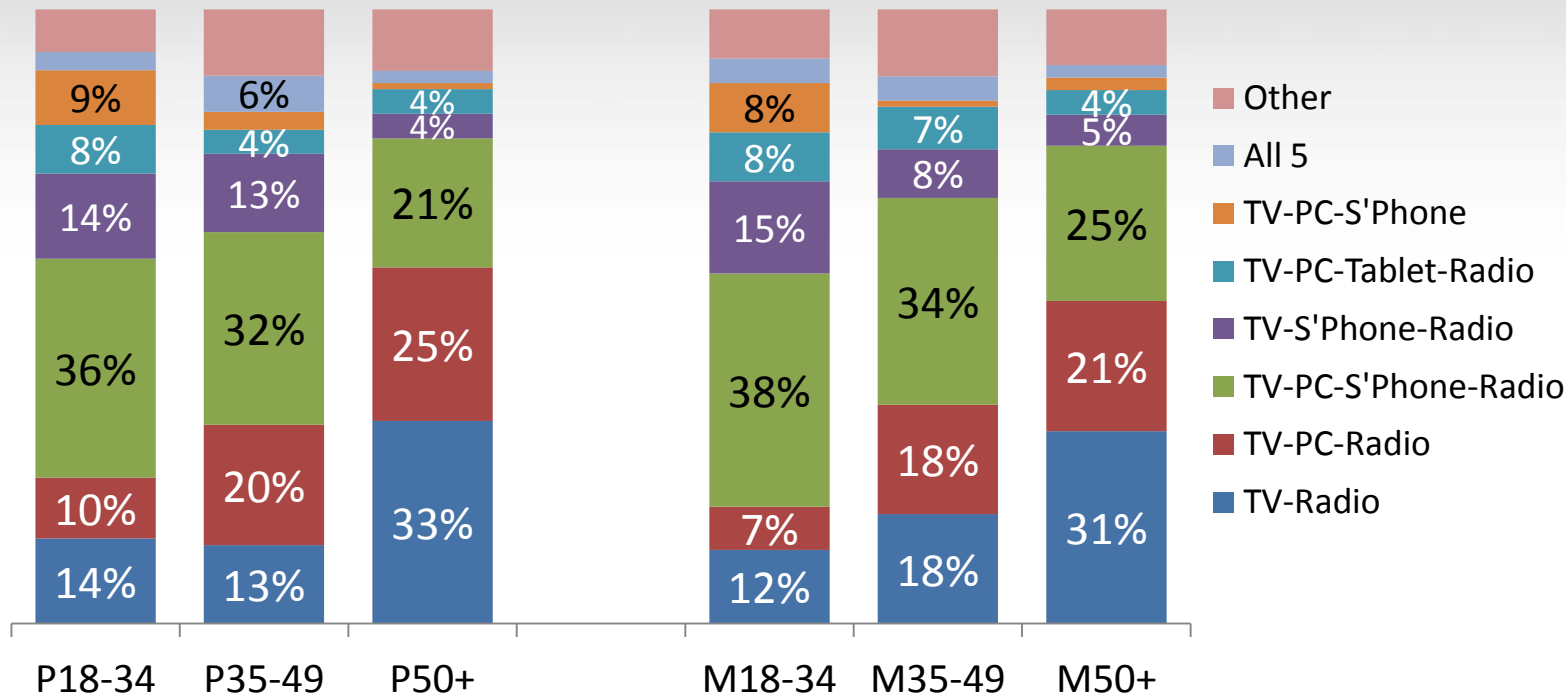
*All demos average around 3 platforms*

**Total U.S. Media Platform Exposure (Avg Week)**



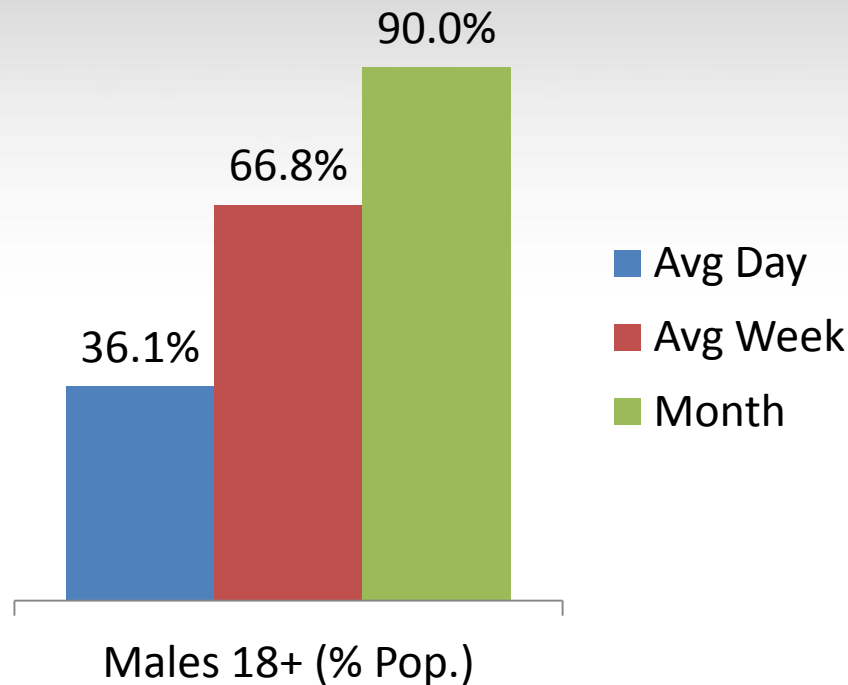
# 80%-90% Of All Users Fall Into Five Groups

% of Population by Platform Usage (Avg Week)



# ESPN's Reach

- ESPN reached, on average, 36% of men daily
- ESPN content was consumed by **106 million men 18+** in September 2013



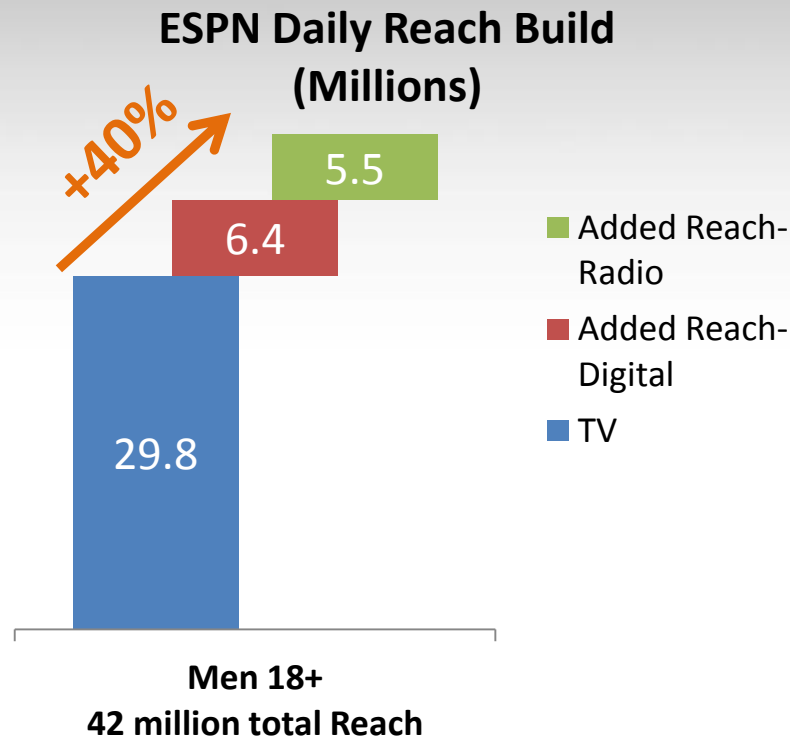
Source: Project Blueprint September 2013





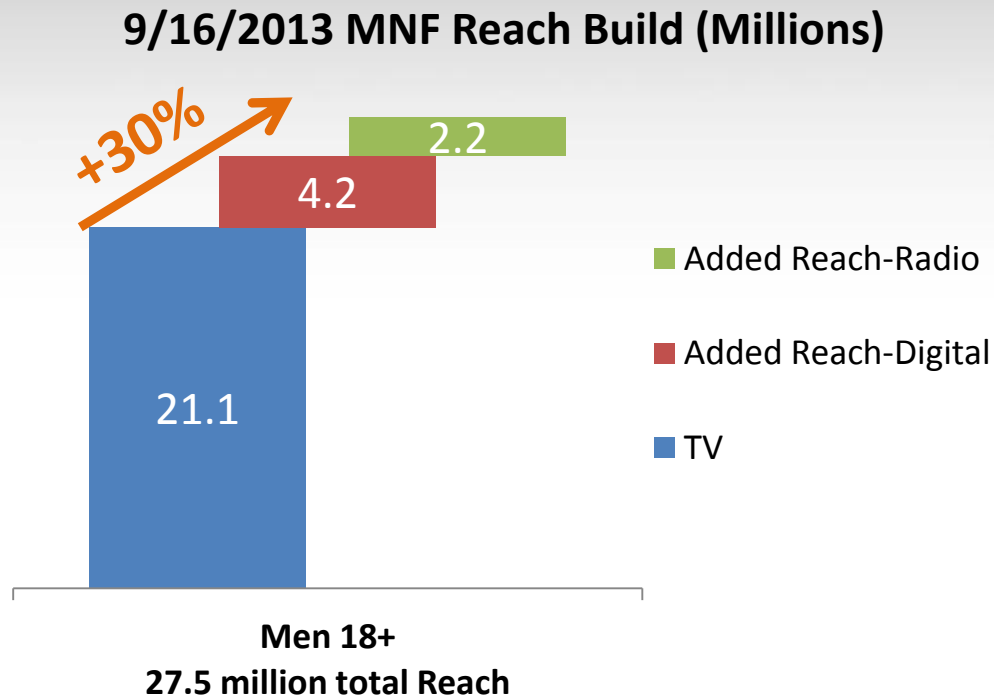
# Exclusive Daily Reach

To take advantage of ESPN's total Reach, an advertiser needs to place messages across all platforms



# Monday Night Football Total Reach 9/16/13

ESPN non-TV  
platforms add reach  
beyond television  
during live events

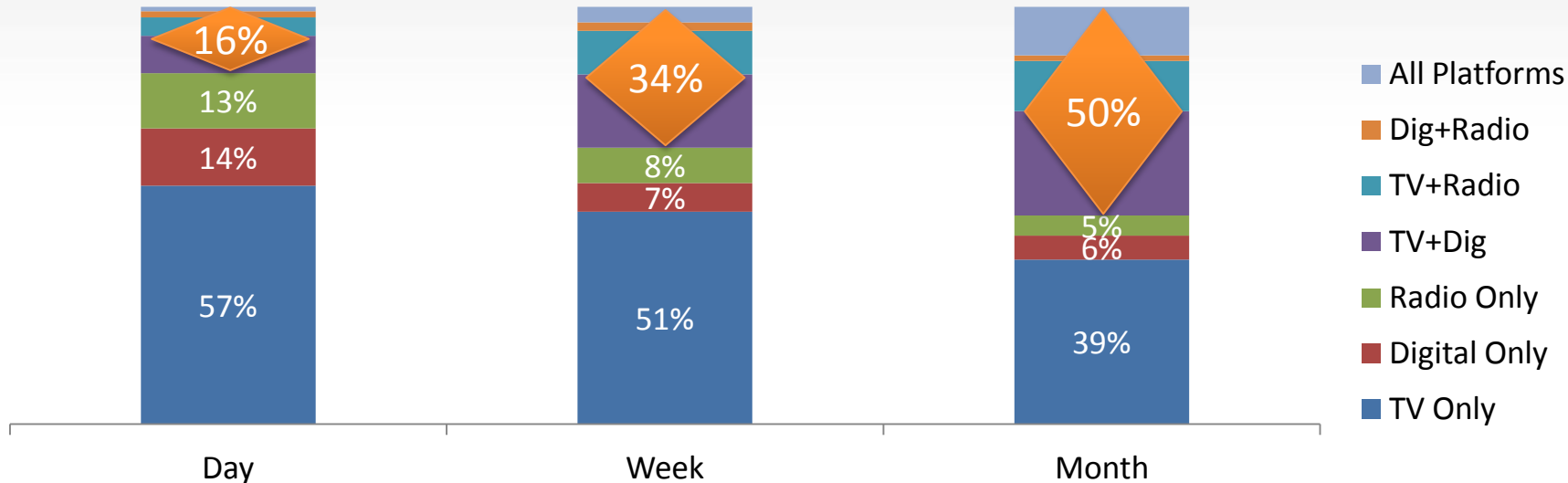


Source: ESPN Analysis of Nielsen and Project Blueprint data, 9/16/2013  
MNF program on TV, 7P-12A time period on all other platforms



# The ESPN Multiplatform User Emerges Over Time

- Over the course of a month, 50% of men who consume ESPN content do so on more than one platform

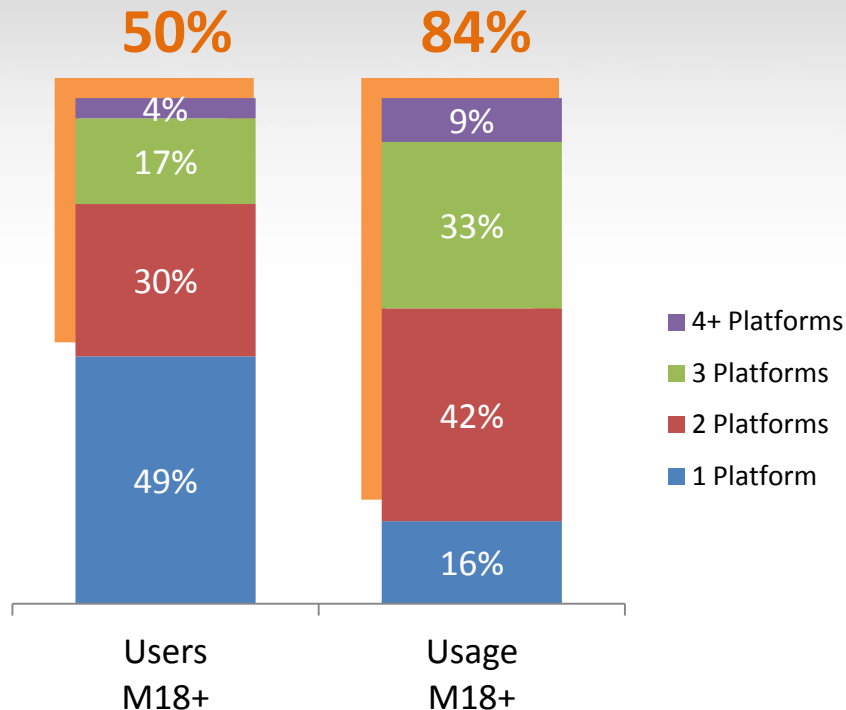


Source: Project Blueprint September 2013



# ESPN Multiplatform Users and Usage

- About half of all users during September 2013 were multiplatform users
- However, multiplatform users did most of the consumption

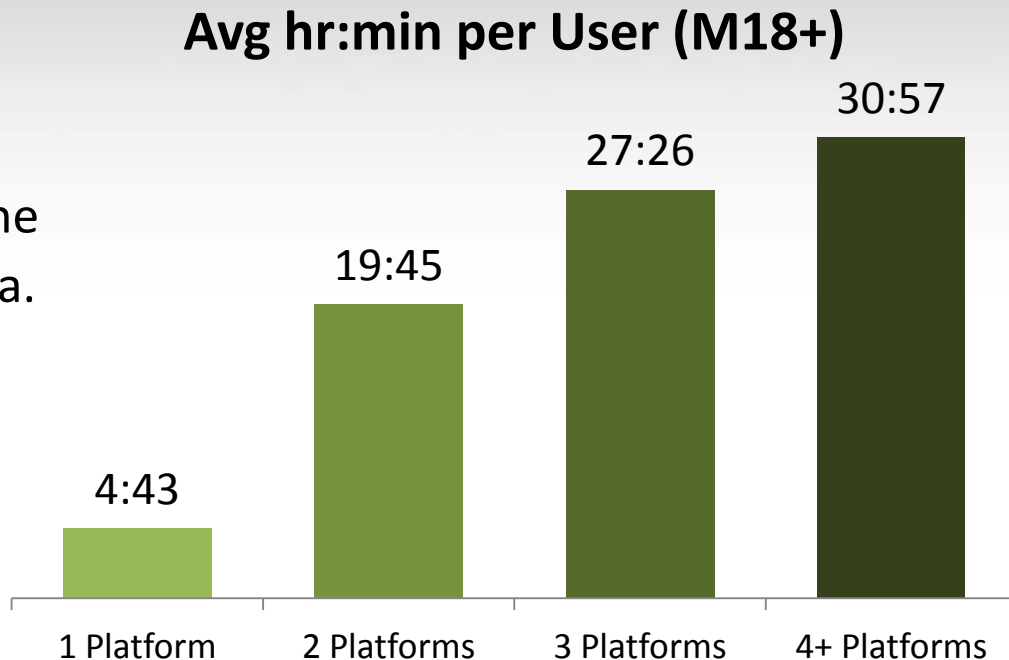


Source: Project Blueprint September 2013 (users/usage in total month)  
Users% = % of total users; Usage% = % of total minutes



# Multiplatform Users Consume More Hours

Multiplatform users consume more ESPN content across different platforms, increasing the total time spent with ESPN media.



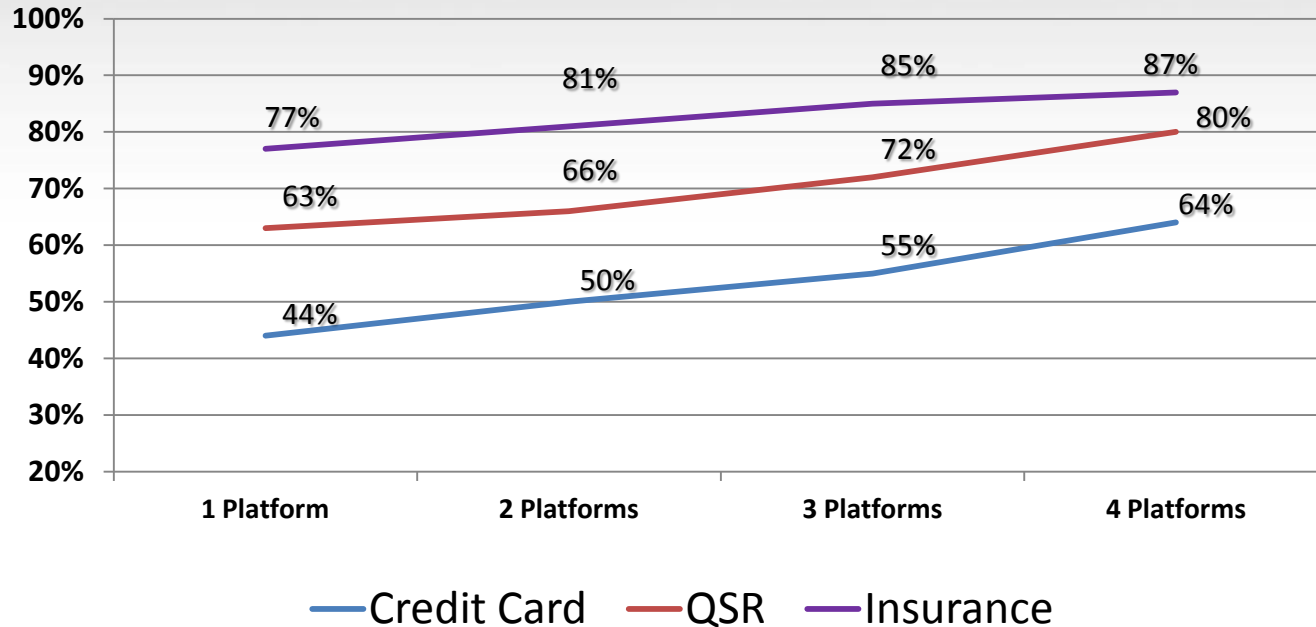
Source: Project Blueprint September 2013 (users/usage in total month)



# Cross-Platform Makes an Impact



## Ad Awareness



Source: ESPN XP Tracker: 2012-2013 Total Ad Awareness





# We Stand At The Crossroads



- Period of unprecedented change in behavior
- Siloed measures are limited
- Project Blueprint reveals the Big Picture

*...and we all need it!*

# We All Need This

- **Advertisers/Agencies**

Actual exposure for multiplatform campaign planning

- **Programmers**

Need to understand how to grow and serve their audiences

- **Everyone**

Because we're falling behind the consumer



# Thank You!



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