TV "SET-TOP BOX" DATA: Interesting insights, new currency or new paradigm?

Changing Industry Perceptions

– "For more than a decade many in the industry looked forward to the STB measurement as an elixir that would deliver better ratings"

– "The television industry is about to sail into a vast ocean of granular insights on TV Viewing"

– "Talk to anyone and they get my sense of urgency. We know we need to move fast…….. It is critical to our future,"

2008-2009

Reality vs. Hype

– RPD Not STB

– Size Matters but Quality Counts

– STB is not census

– Very difficult to extract

– No demos

– Not really representative of U.S. if they don't have all cable, all satellite, all telco, and all non-connected homes

CIMM Analysis of the RPD Landscape

No one company or source offers a full overview of the RPD industry

MVPDs

Networks, Programmers

Data Processors

Agencies, Adverisers

Software Vendors
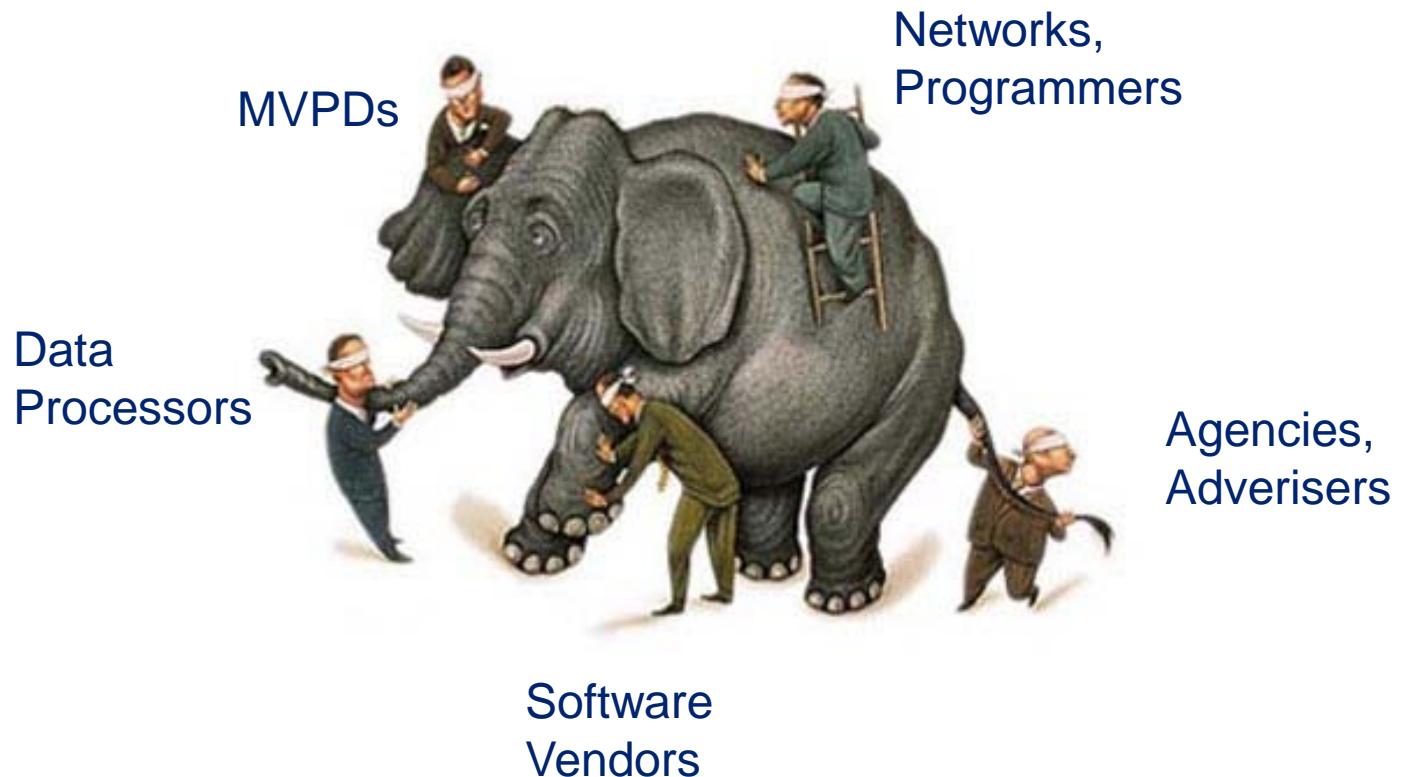
CIMM 2010 Findings Strengths

- **Larger samples, more granular data**

  - Improvement of Local Measurement

  - Measurement of Long Tail and Unmeasured Networks

  - More Stable Measurement of Niche Consumer Groups

- **Passive Data Collection**

- **Potential to Link Cross-Platform Behavior**

- **Commercials and Commercial Pod Measurement**

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CIMM 2010 Findings
Challenges

- **Establishing data standards/Lexicon**

- **Non-representative Samples**

- **Lack of demographics**

- **Privacy**

- **Fear of the unknown**

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CIMM 2012 RPD Update

Adoption and Usage has advanced:

- Local measurement

- Data matching for consumer segmentation

- Industry committees for standardization

- Integration into planning/buying software

- Some use of RPD as secondary stewardship measure

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CIMM '12 RPD Update

Challenges:

- **Cost**

- **Slow roll-out of data**

- **Data gaps**

- **Lack of data infrastructure for aggregation**

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Finding Value

Value of RPD

Consumer segmentation/planning
- **Shopper behavior**
- **In-market consumers**

Advanced Advertising
- **Increased efficiency**

Research:
- **Granular data for promo conversion, audience flow, etc.**

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Television – The way it used to be

Today's Video environment is well beyond the STB