



AUDIENCE MEASUREMENT 5.0



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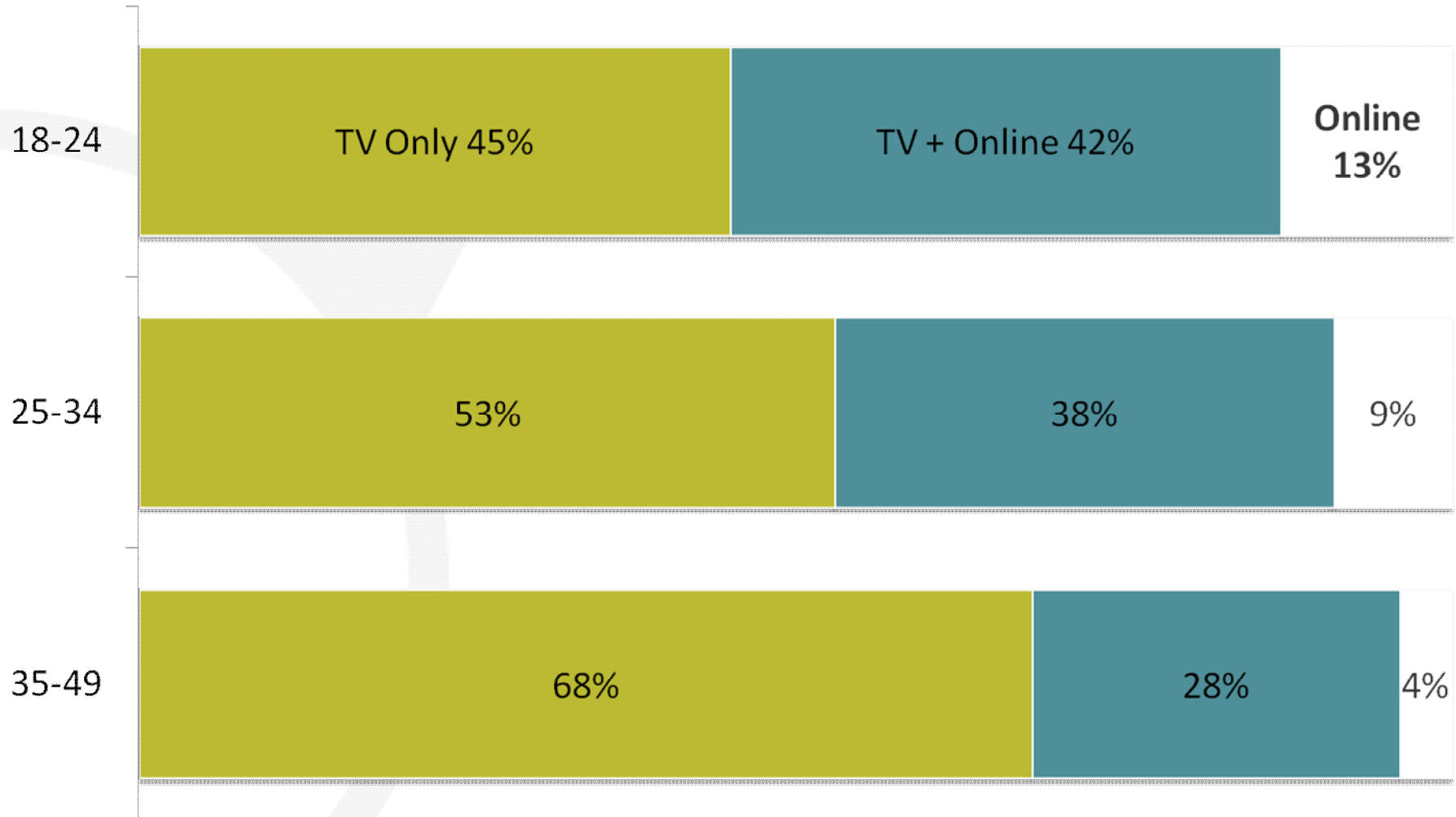
Director, Cross Media
Insights
comScore

**TV Everywhere: Today's
Converged World of Video Viewing**

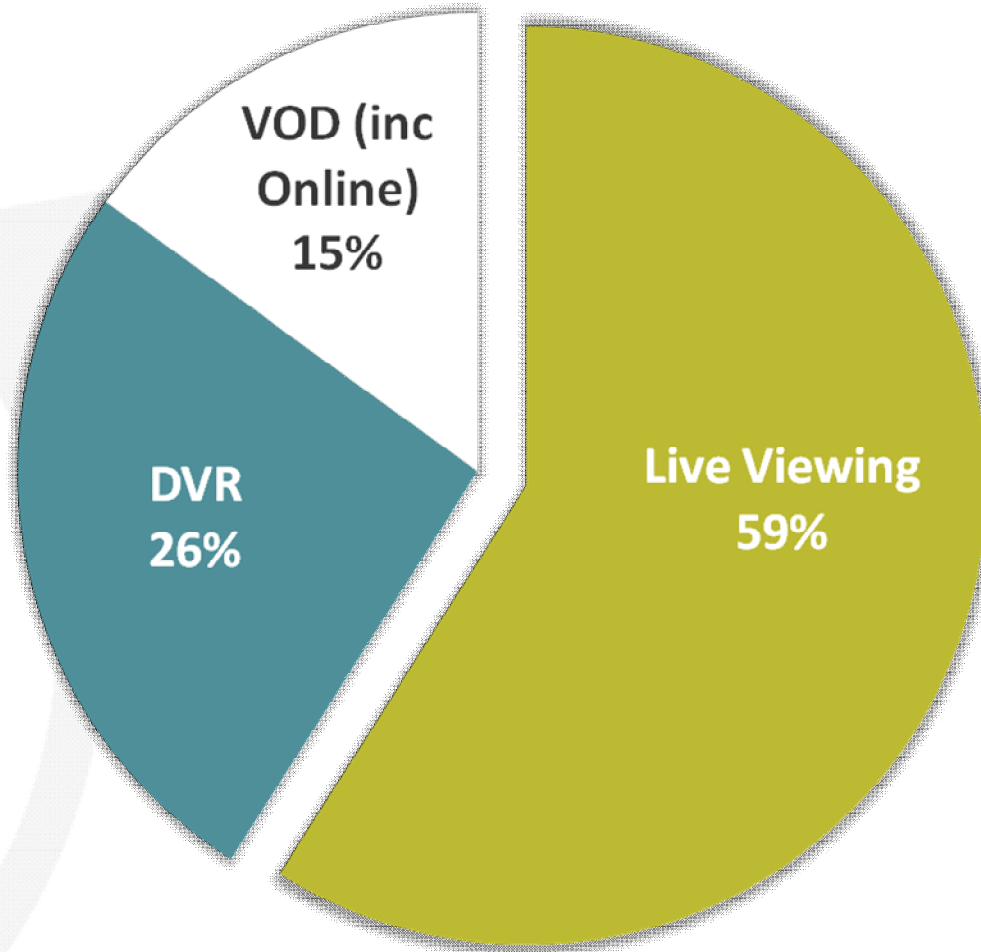
Background: The New Divide

65 / 35

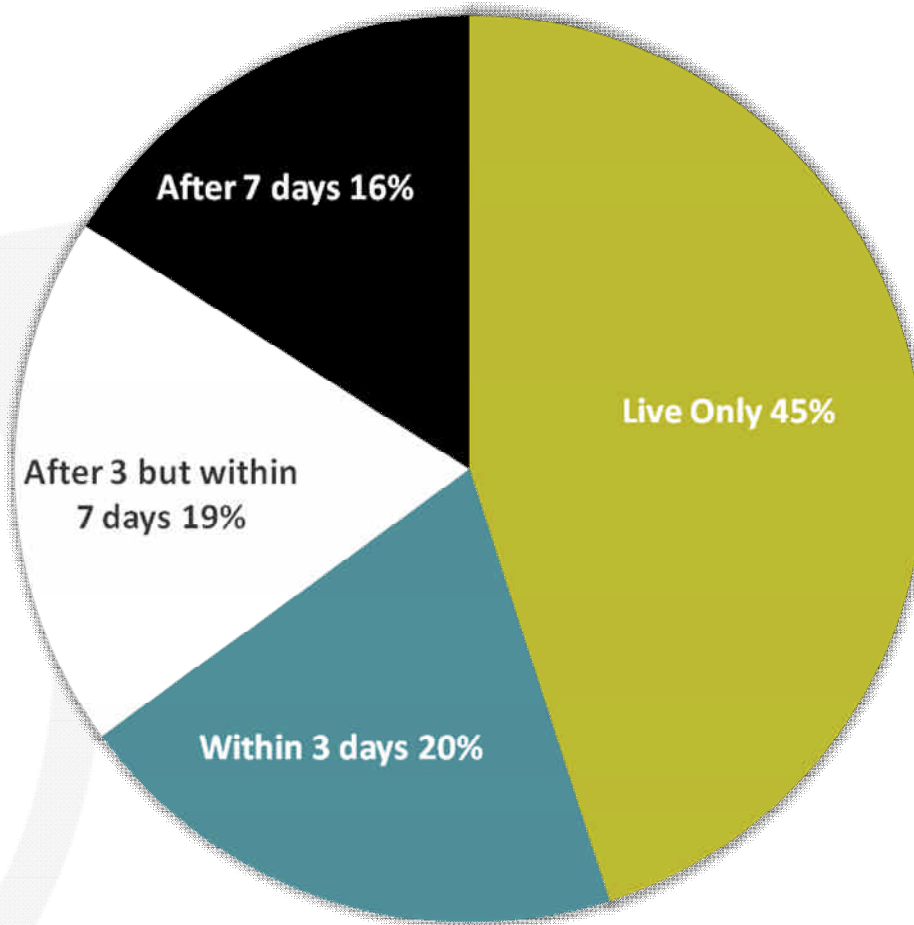
Platform Viewing by Age:



Live and Time Shifted Viewing by Time Spent

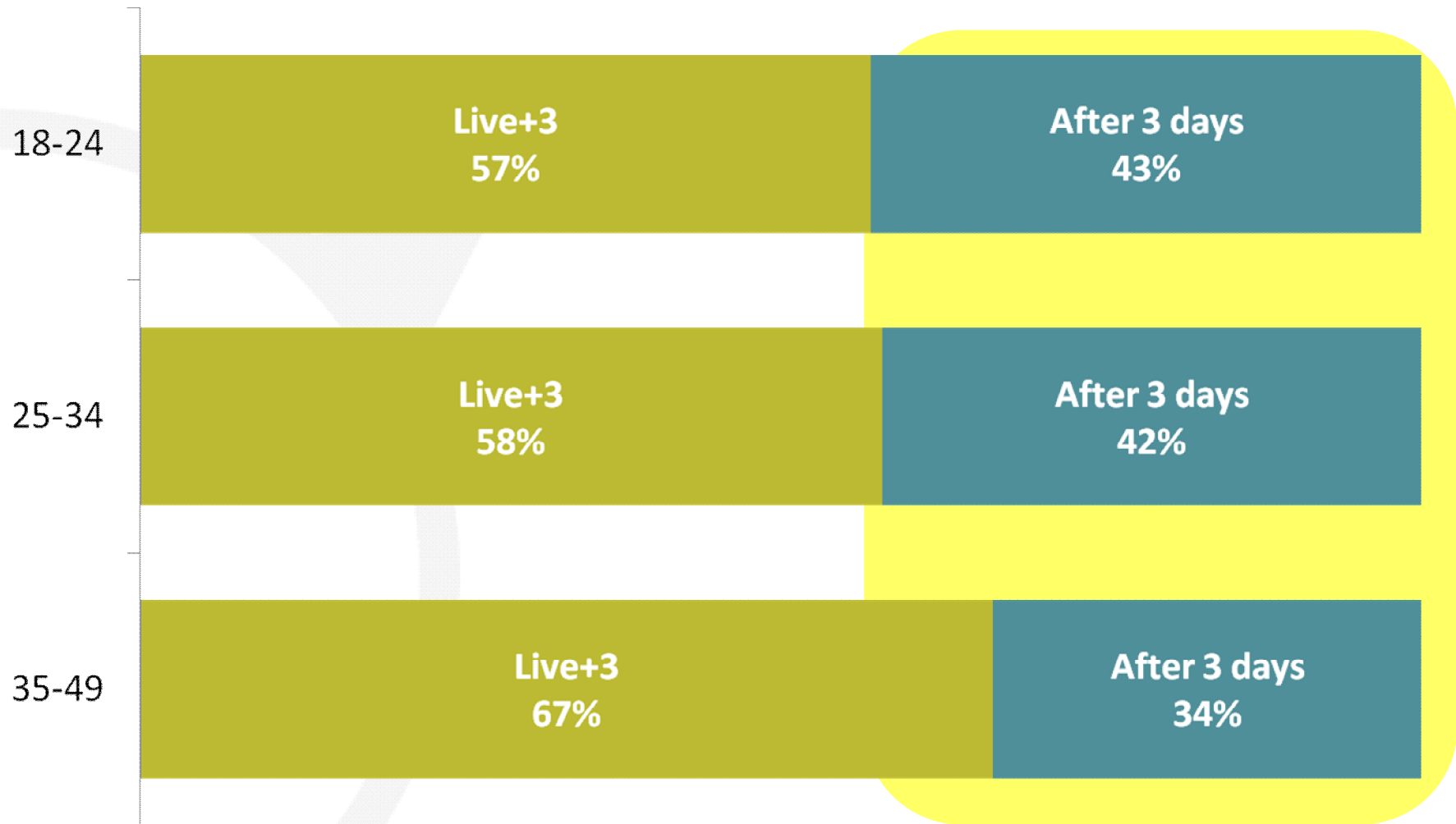


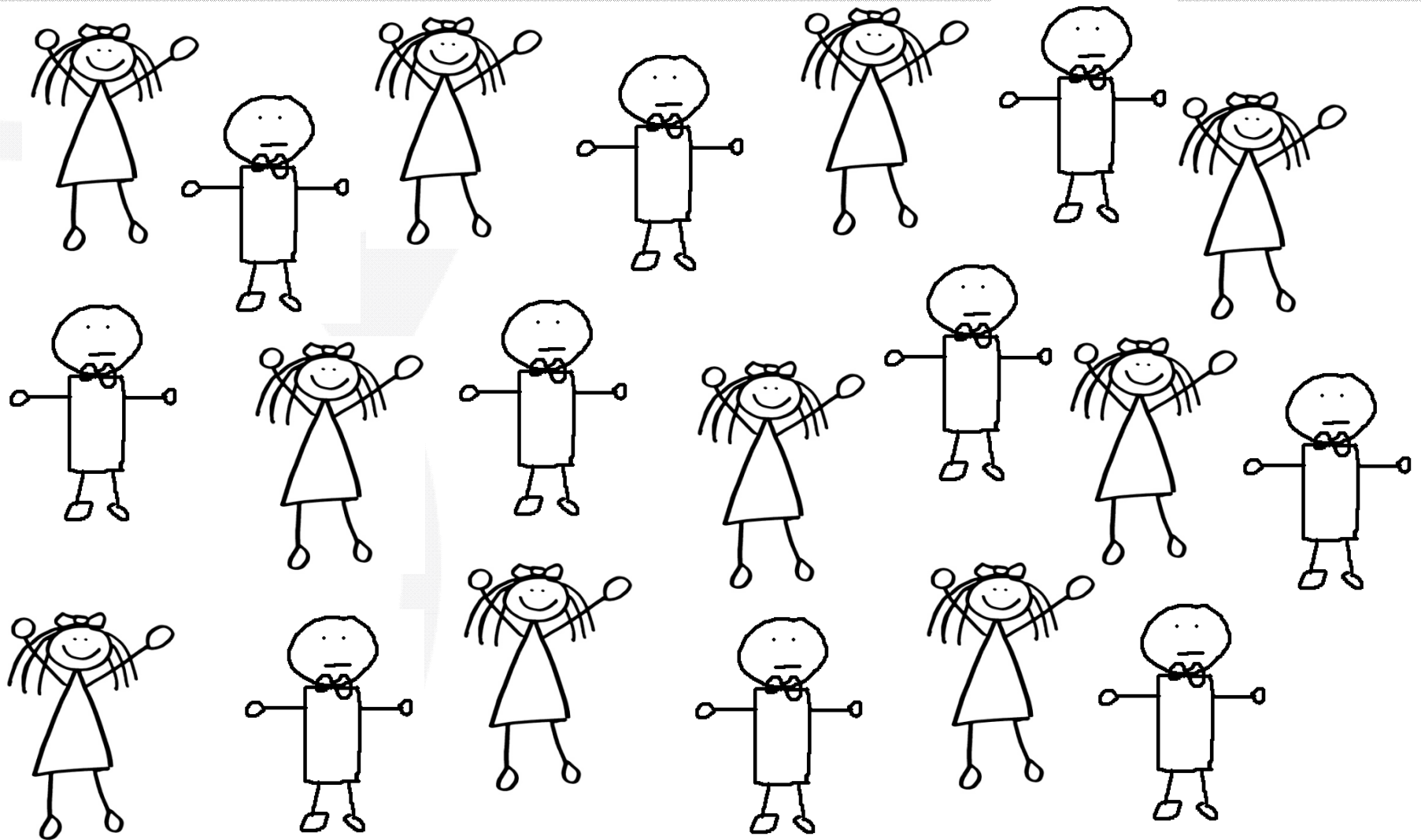
Another 65 / 35: Live+3, and After 3 Days



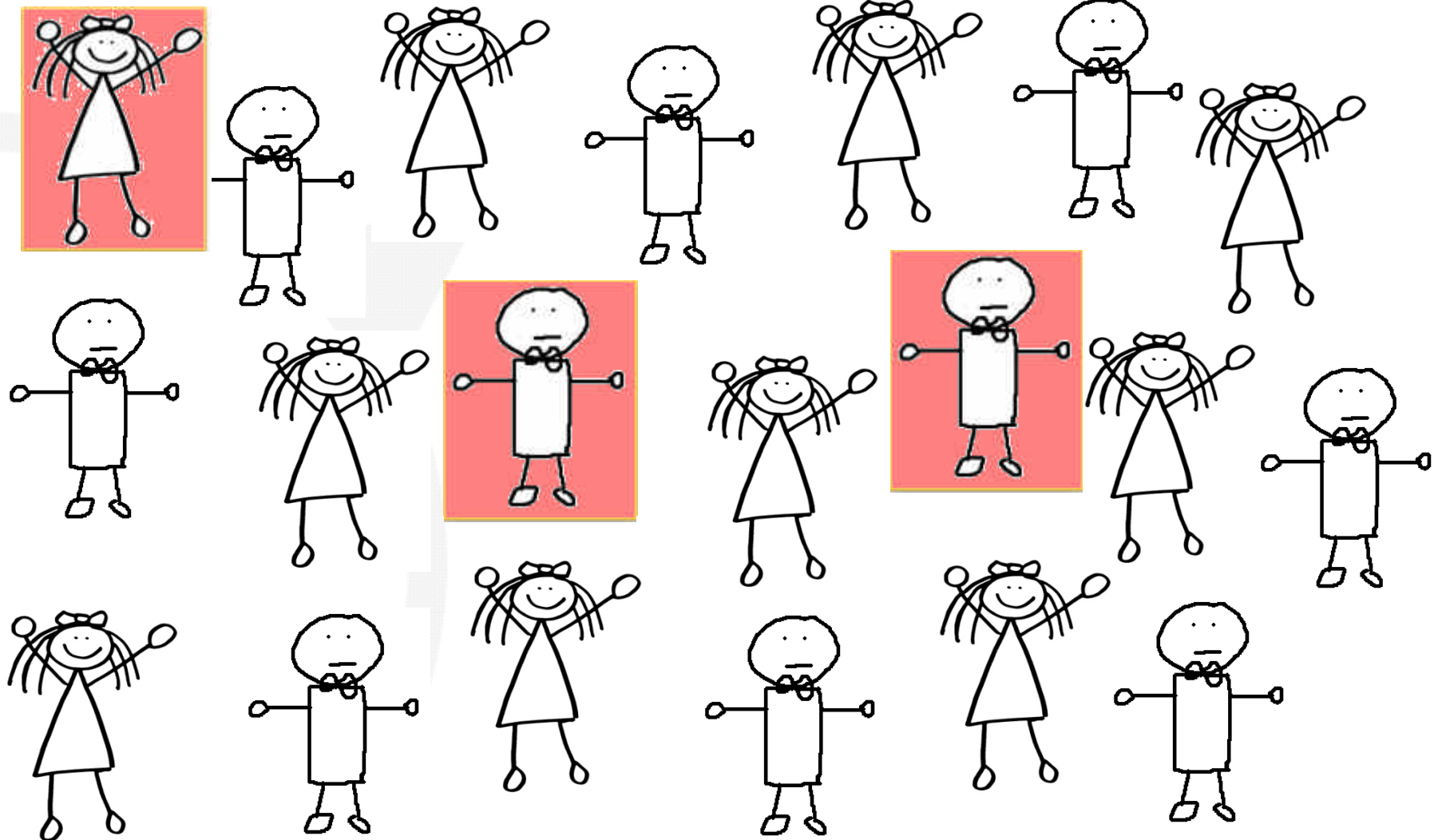
Which one of the following best describes how you typically watch original TV series?
Note - this refers to primary mode of viewing, not time spent viewing

The Younger the Viewer, the More Likely to View After 3 Days

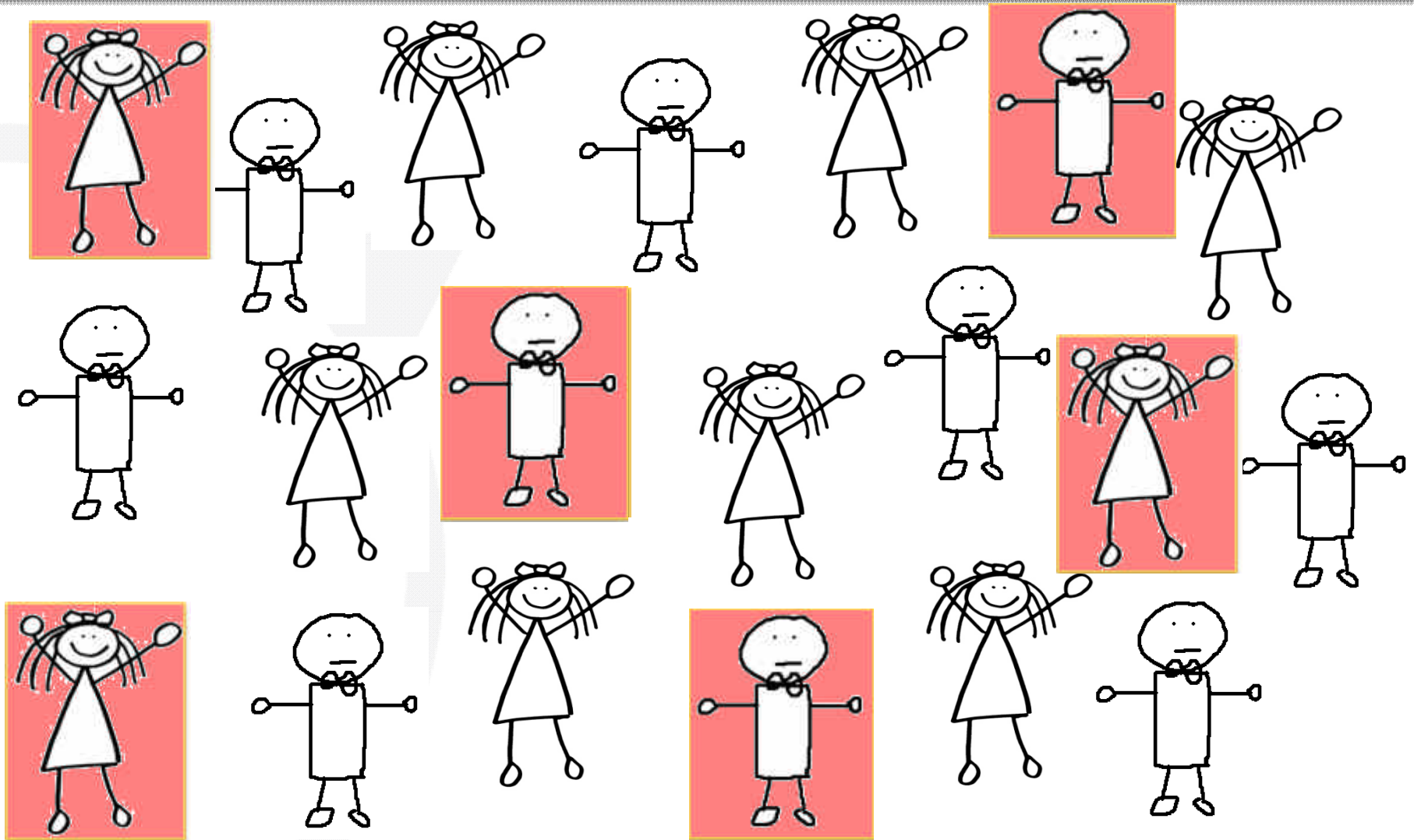




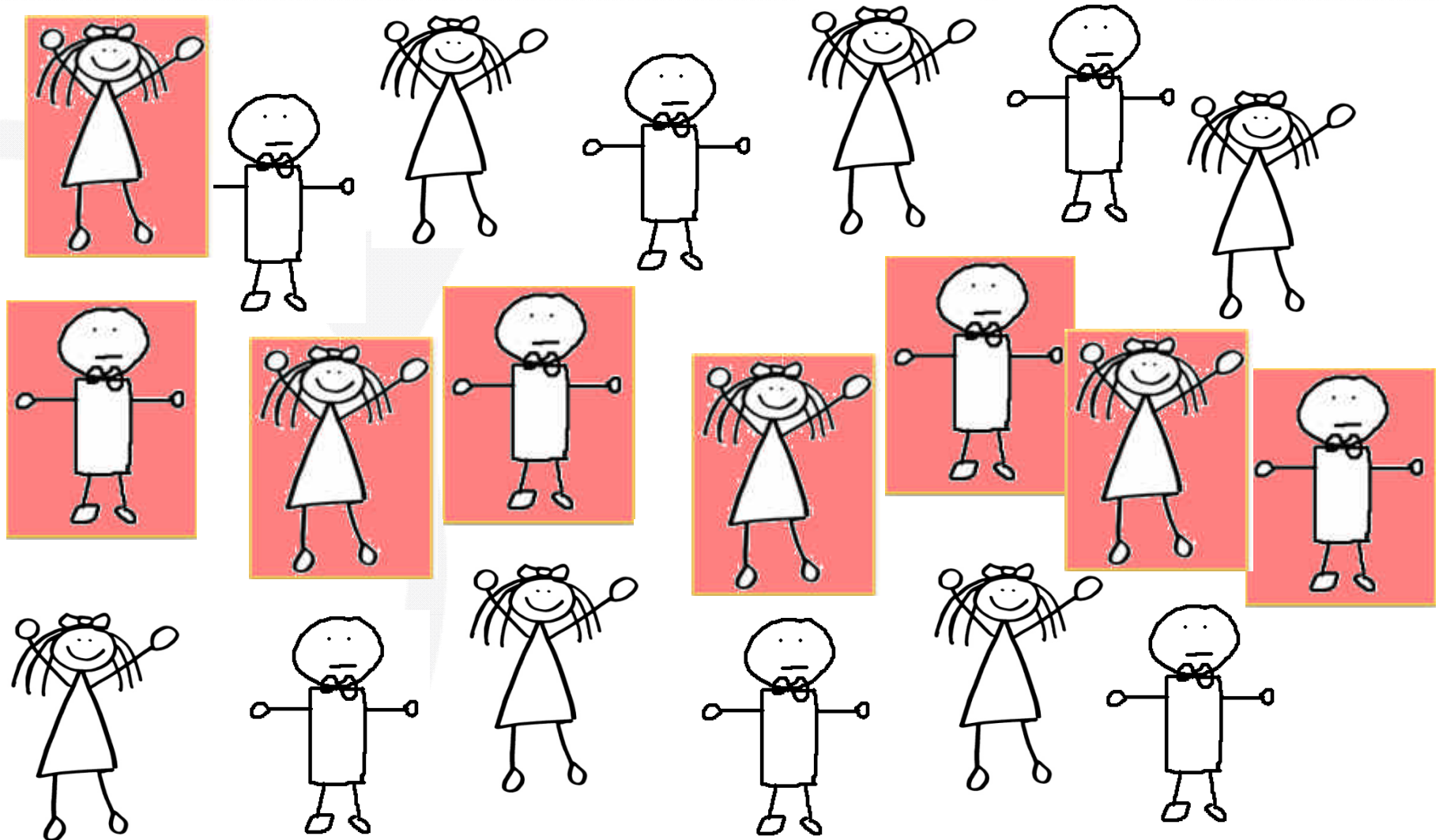
Connect Computers to the TV



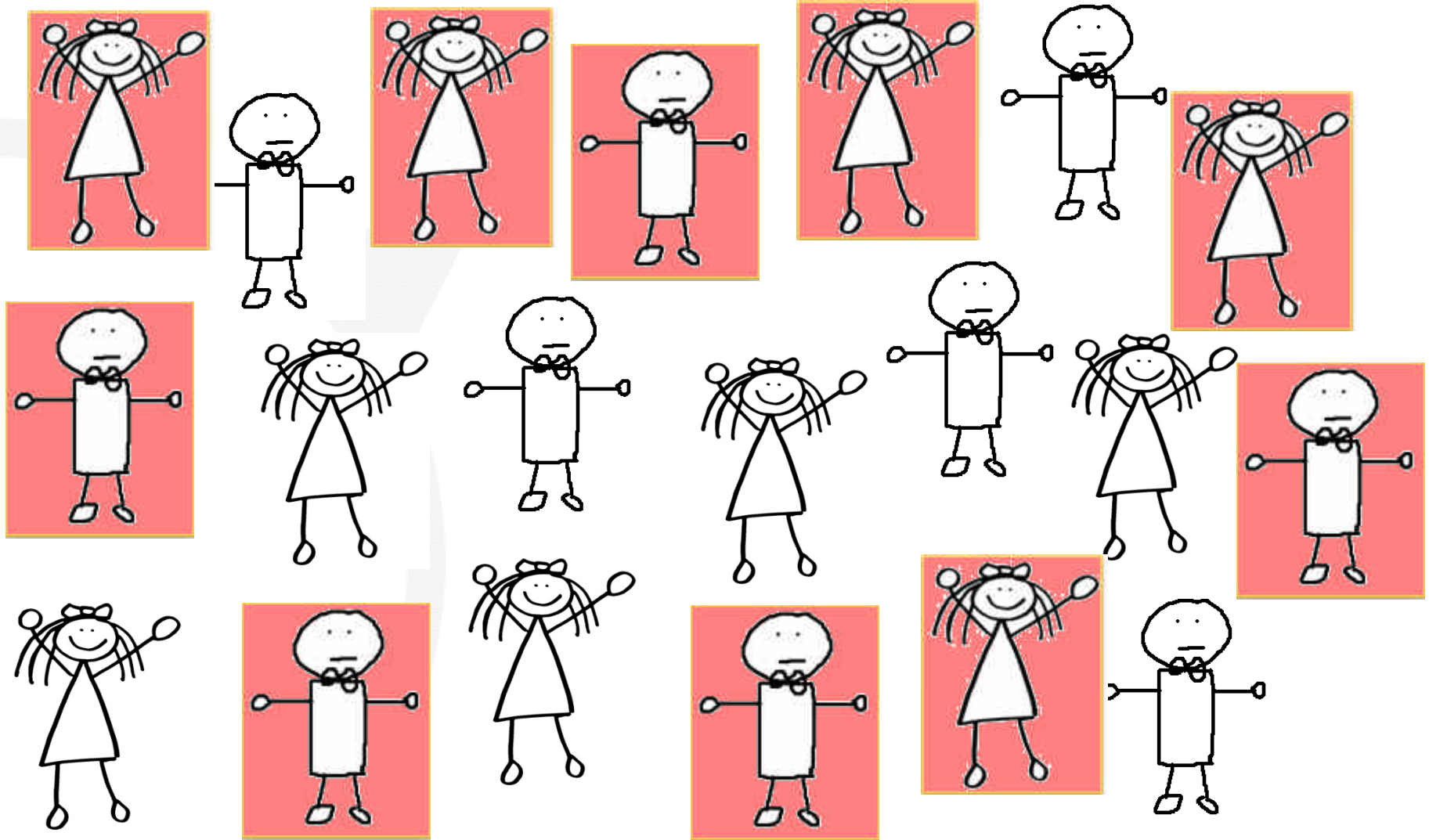
Comment



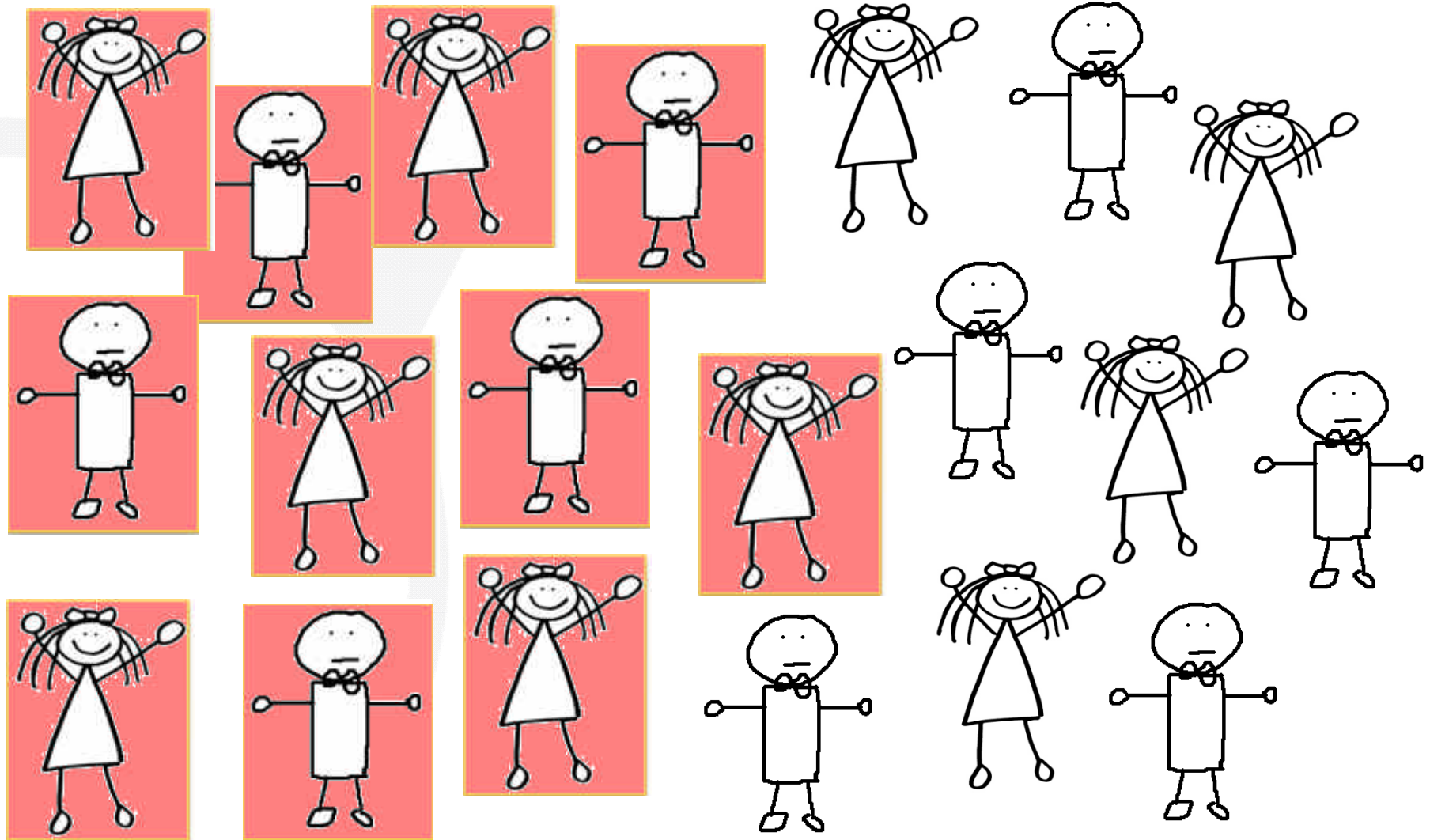
Upload



Share

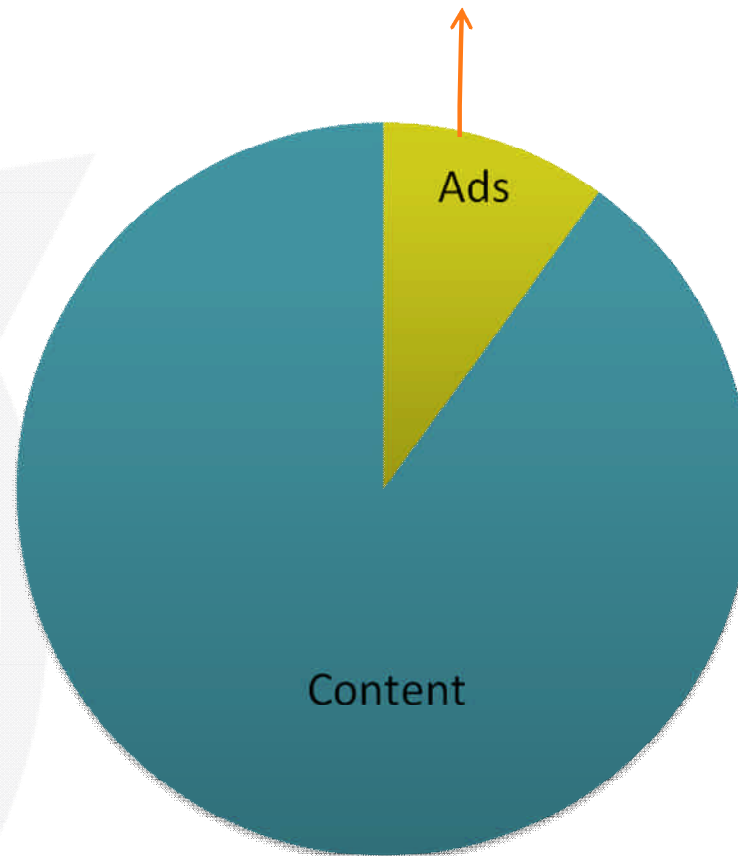


View Video with Other People



Problem

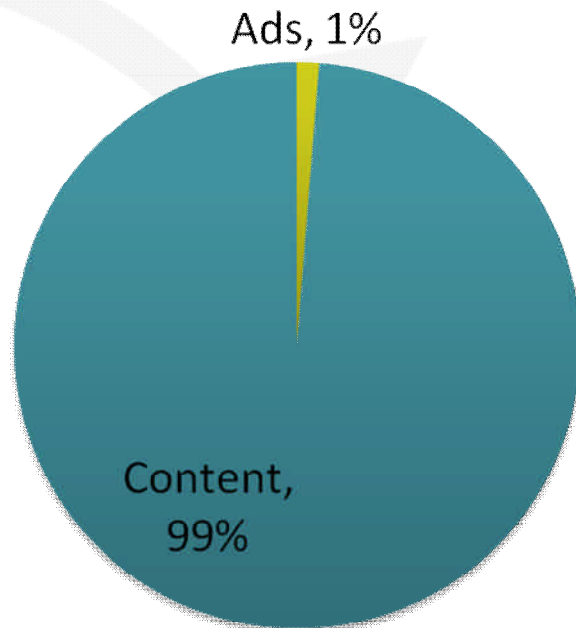
Only 10% of Videos Viewed are Ads



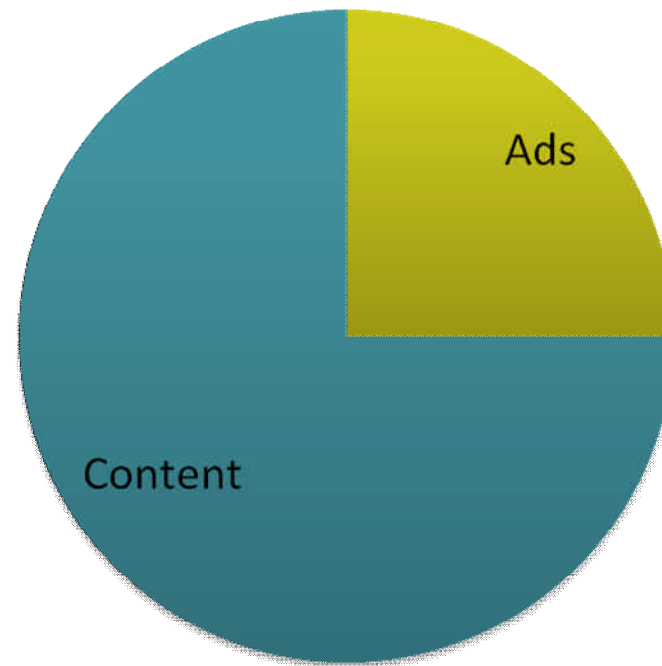
Source: Video Metrix March 2010 Data

Ads as a Percent of Time Spent with Video Online

All Online Video



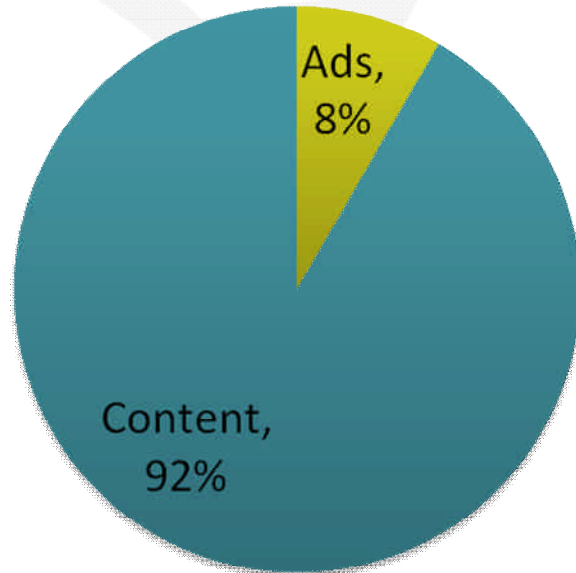
Television



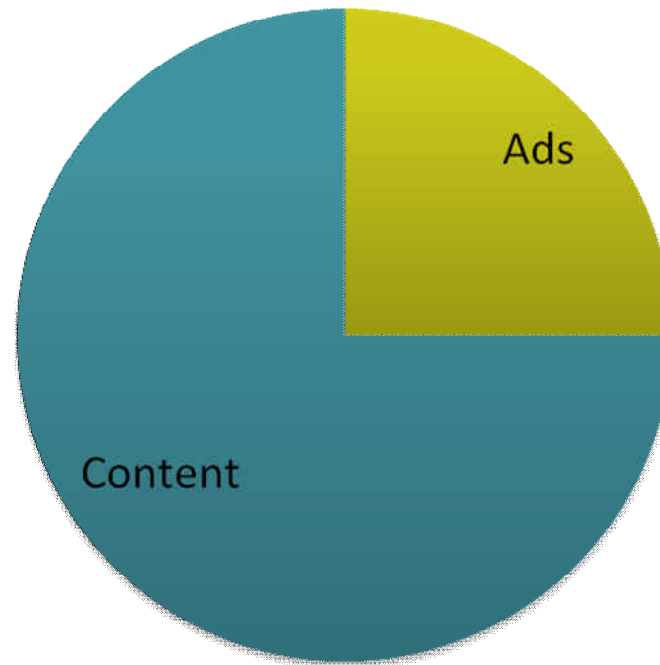
Source: Video Metrix March 2010 Data

Ad Percentages

Online Long-Form Premium

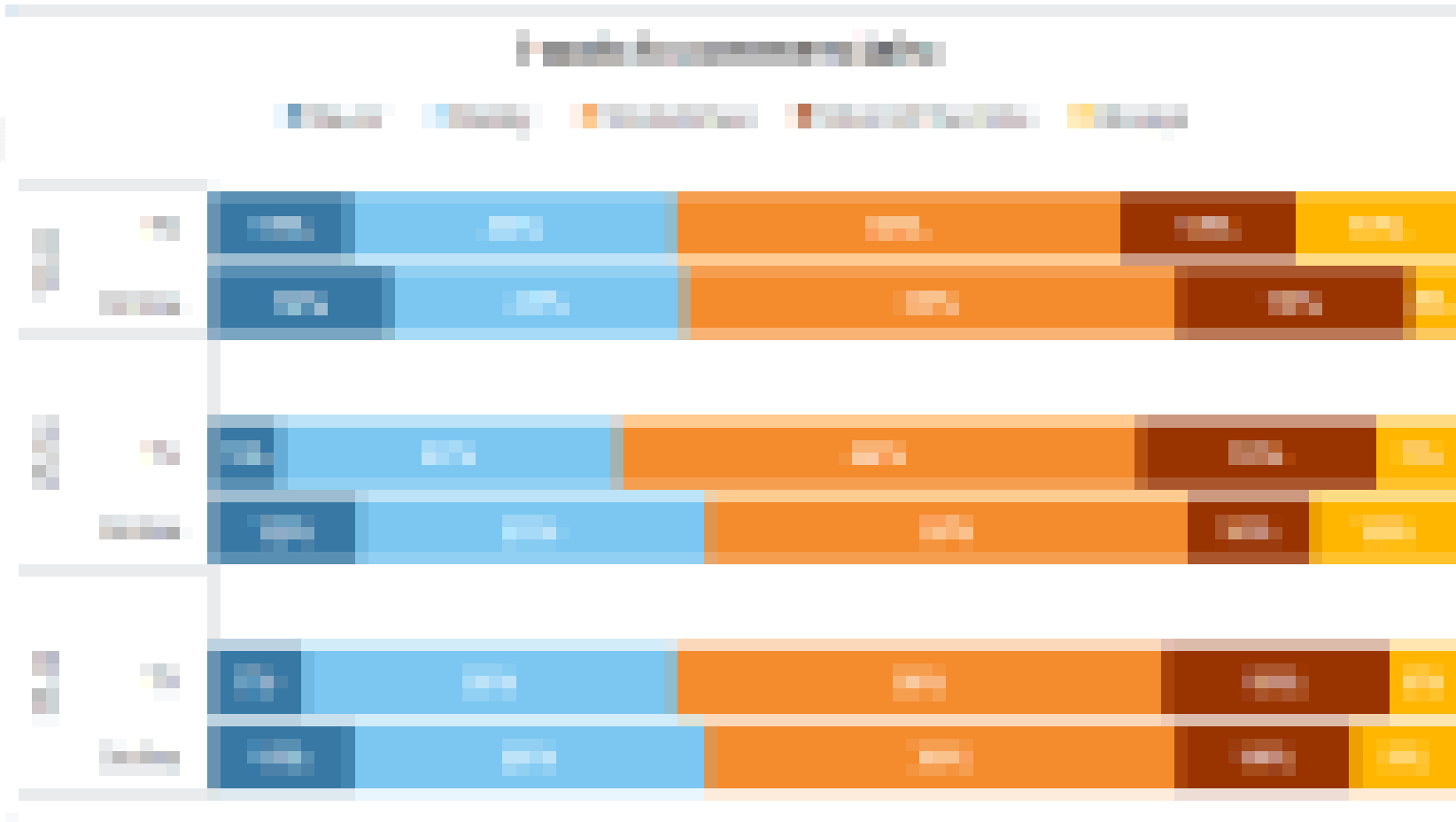


Television



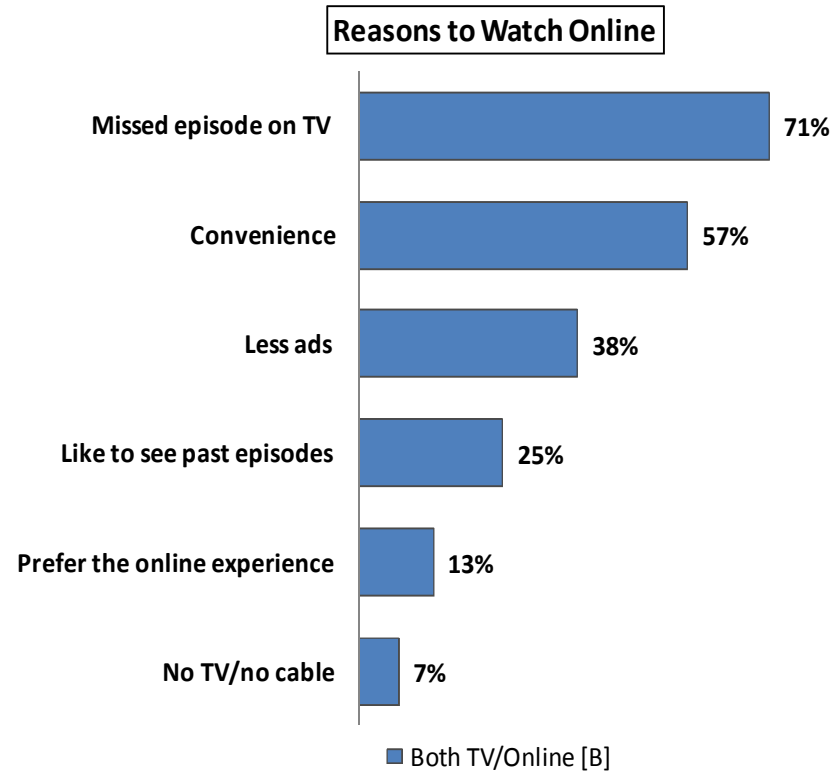
Source: Video Metrix March 2010 Data

Ad Watching TV / Online Is Quite Similar



What do Our Viewers Really Value?

If the program you want to see is not immediately available, would you:	18-24's	25-39's	Cross Platform Viewers
Wait up to a week and then try again	47%	59%	53%
Lose interest and watch something else	30%	20%	20%
Pay to download it	8.5%	6.1%	5%

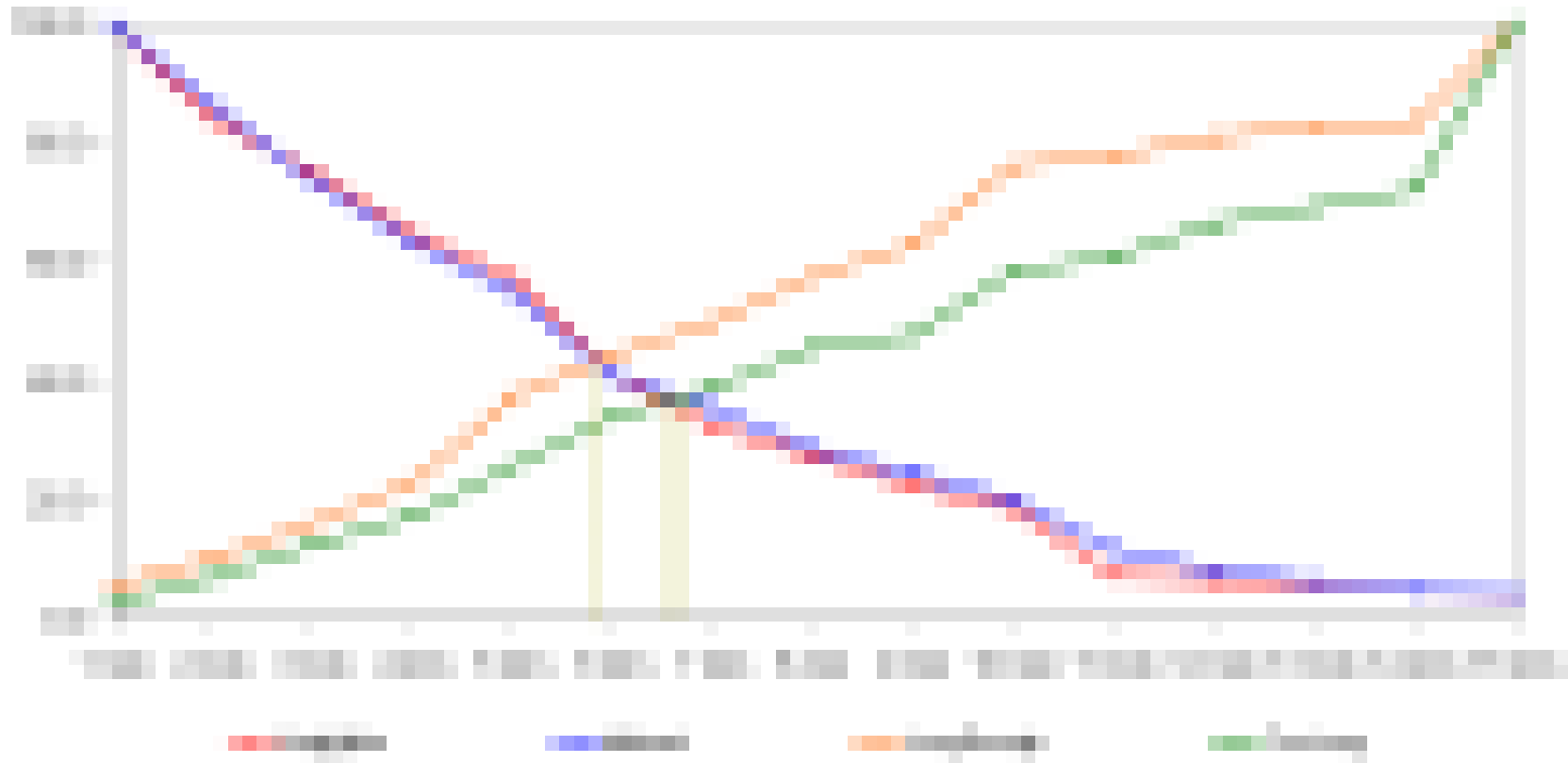


Methods

- Video Metrix (comScore behavioral panel)
- Survey Respondent Recruitment: comScore Panel
 - The comScore panel consists of ~ 1 million U.S. members and is representative of US online consumers who have agreed to have their online activities monitored
 - Administration: The study was launched on December 30th, 2009 and closed January 22nd, 2010
- Weighting
 - The respondents were weighted to match the Total online population on age, income and gender
- Statistical Analysis
 - Statistical Testing (2 tailed test) was done to measure significance at a 90% level of confidence. Capital letters (i.e. A, B) indicates a 90% statistically significant difference over the segment to which the letter refers

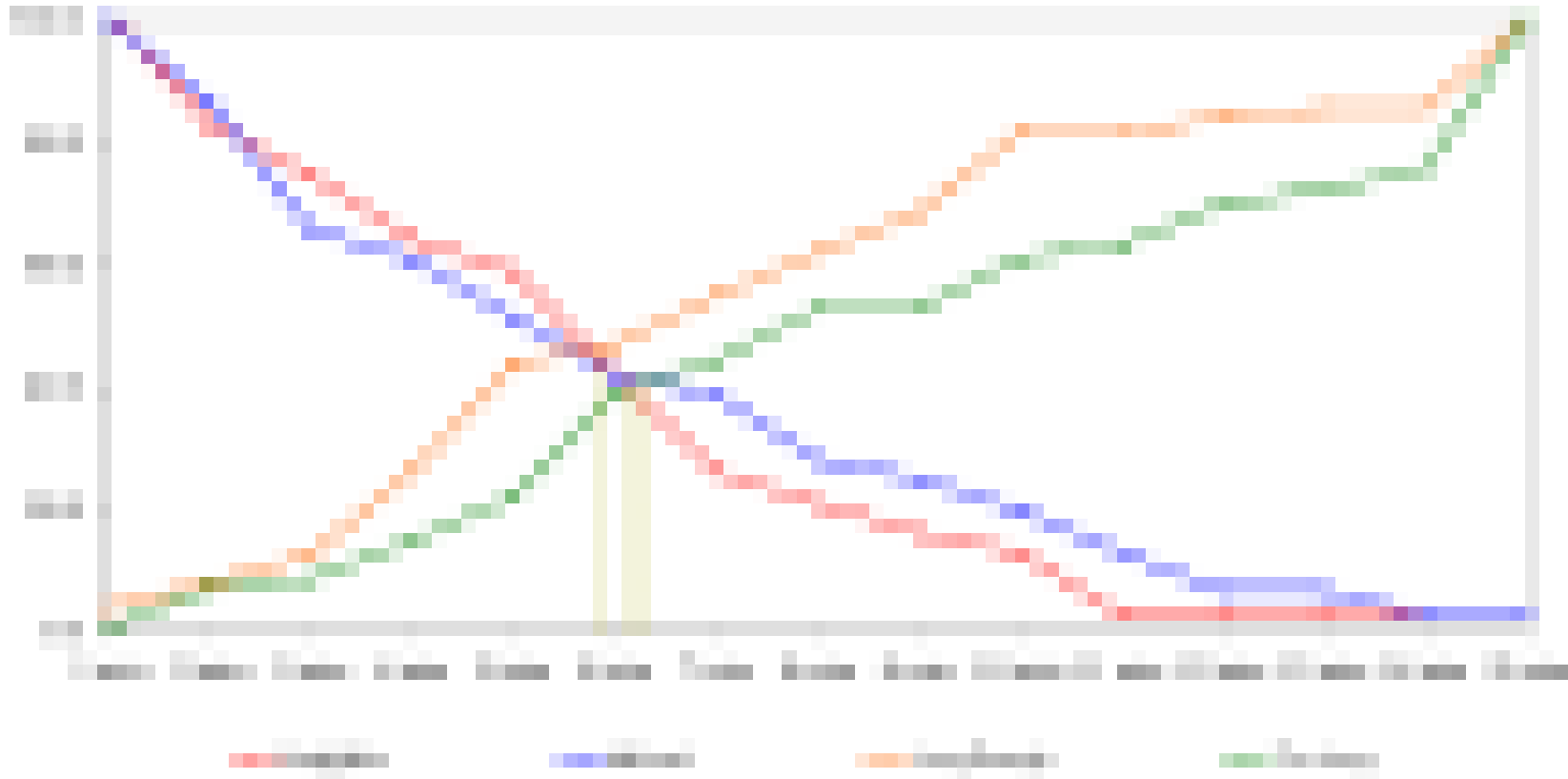
Analysis: The 'Ad Sensitivity Meter'

Desired Length of Commercials Online: 18-49



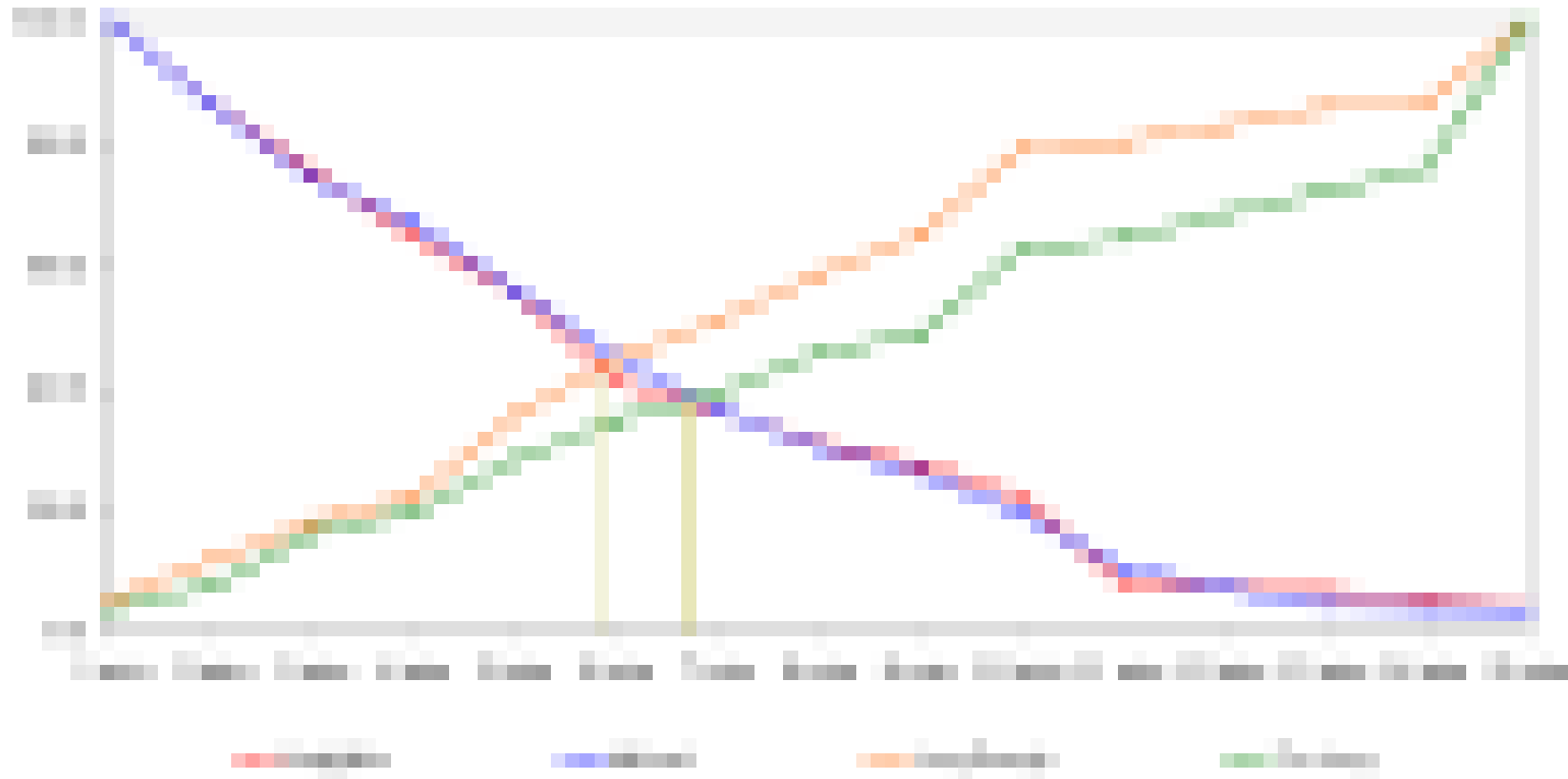
Ad Sensitivity – 18-24

Desired Length of Commercials Online



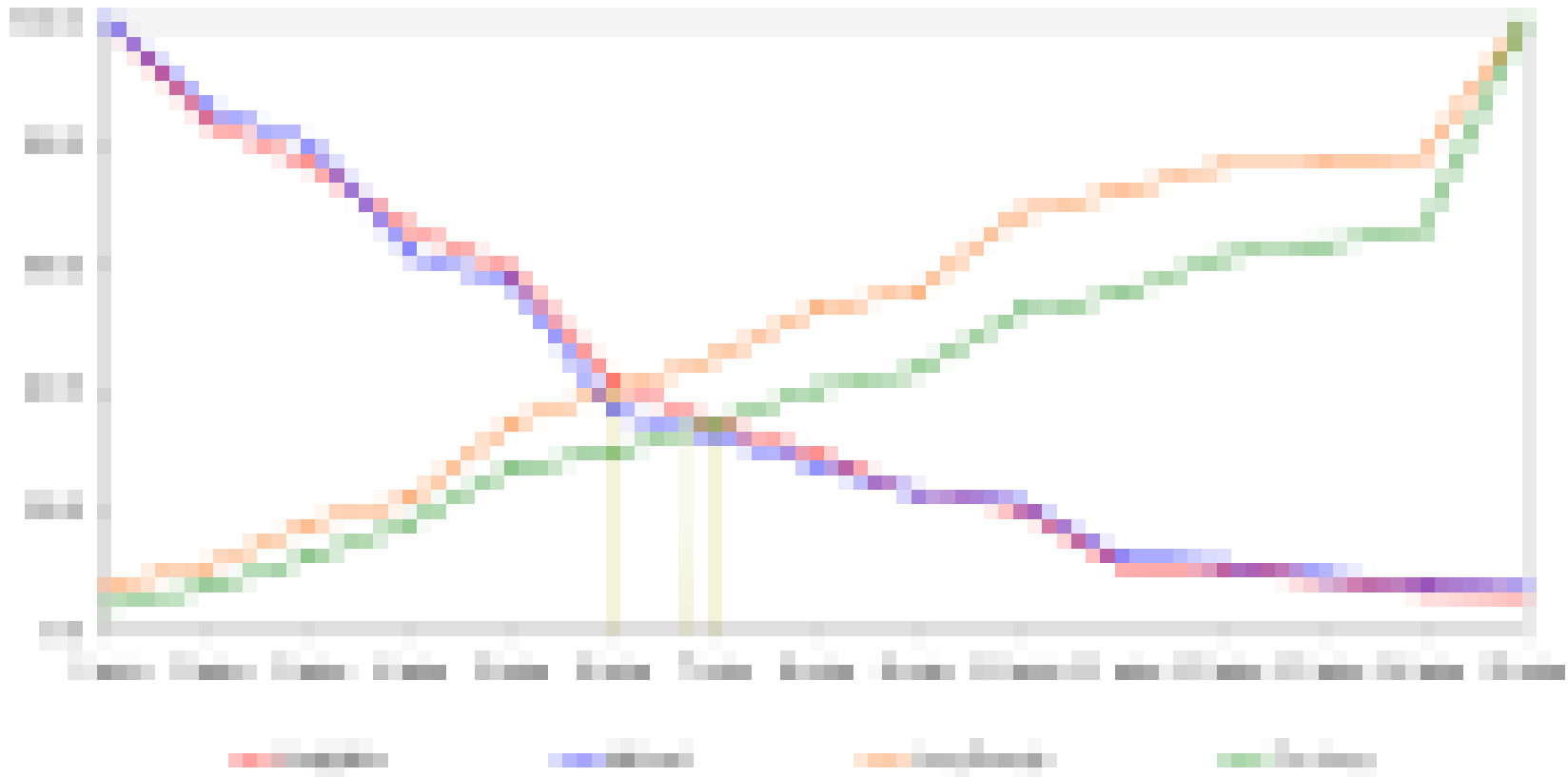
Ad Sensitivity – 25-34

Desired Length of Commercials Online



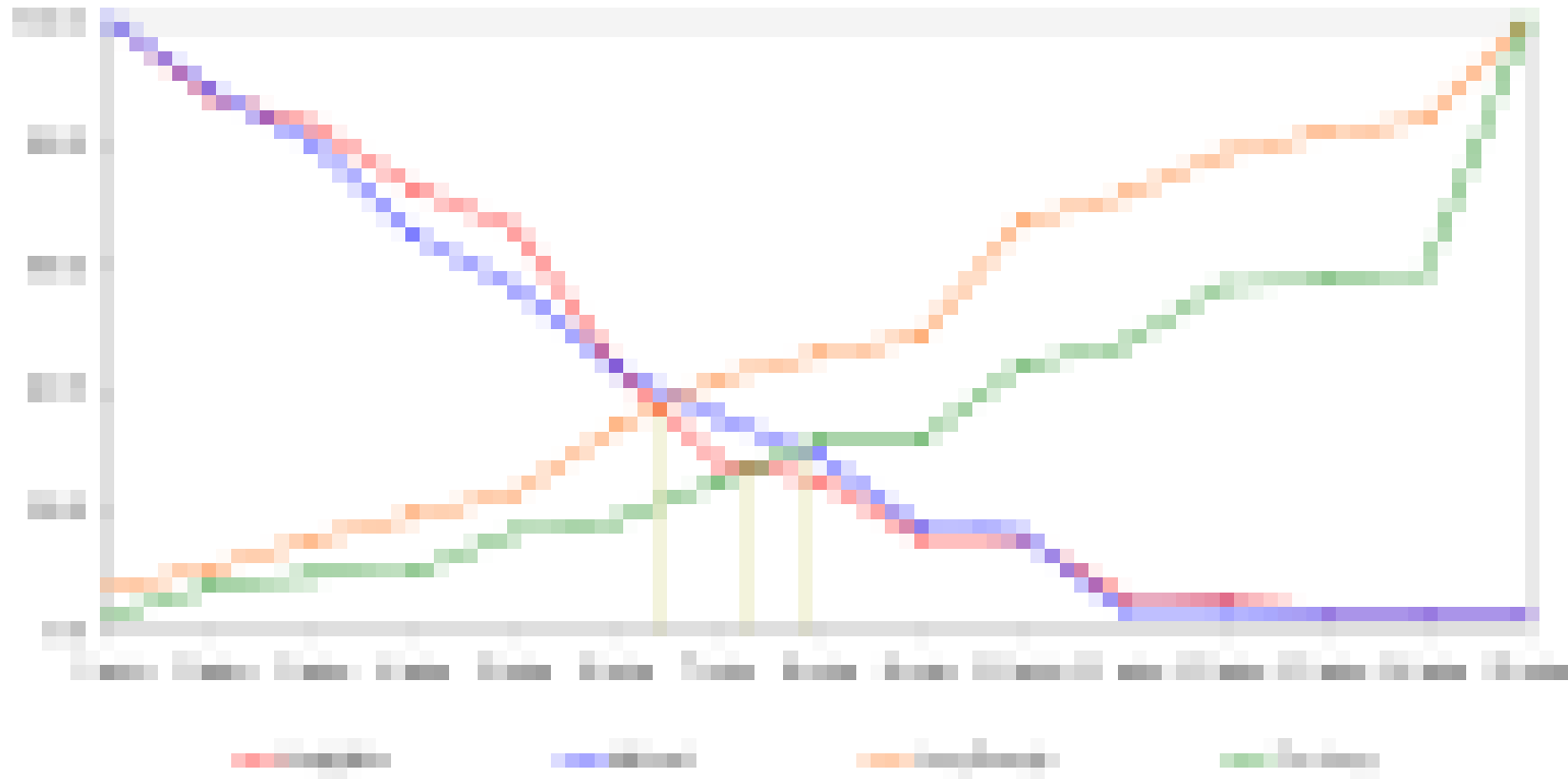
Ad Sensitivity – 35-49

Desired Length of Commercials Online



Ad Sensitivity – 50+

Desired Length of Commercials Online



Conclusions

- Changing viewer values and behaviors create new cross platform opportunities
- We need to question our assumptions
- Be wary of a one-size-fits-all approach to long form advertising and content distribution

Next Steps

