SCREEN GRAB:

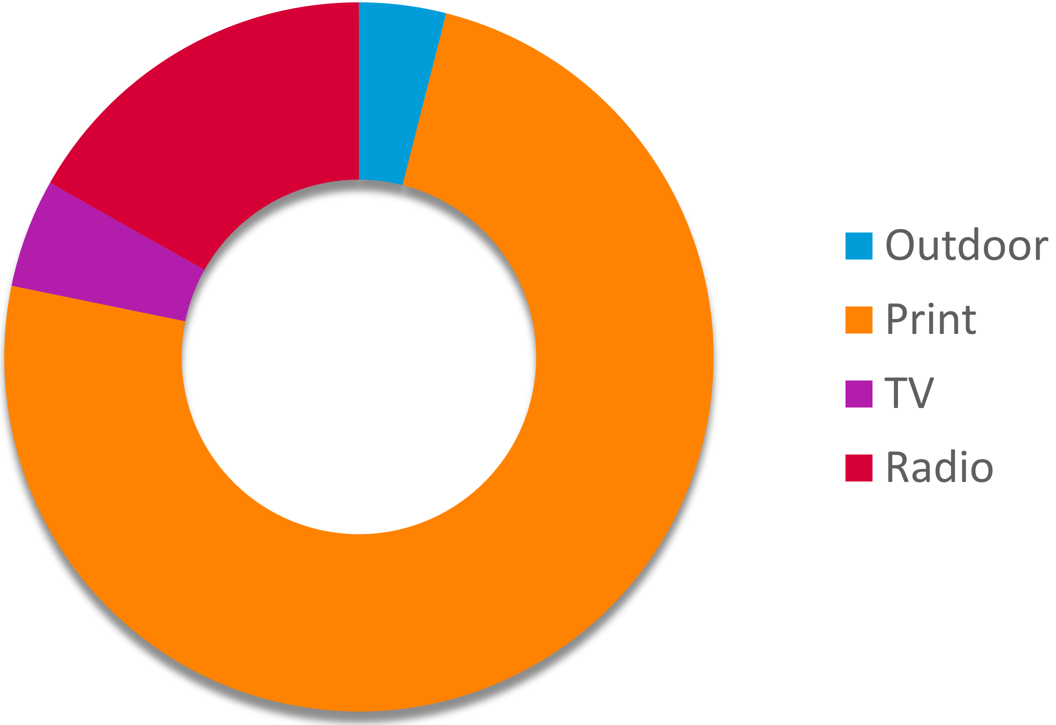
WHY MULTISCREEN MEASUREMENT NEEDS TO ADD UP

Megan Clarken, EVP Media Products
24 May, 2013

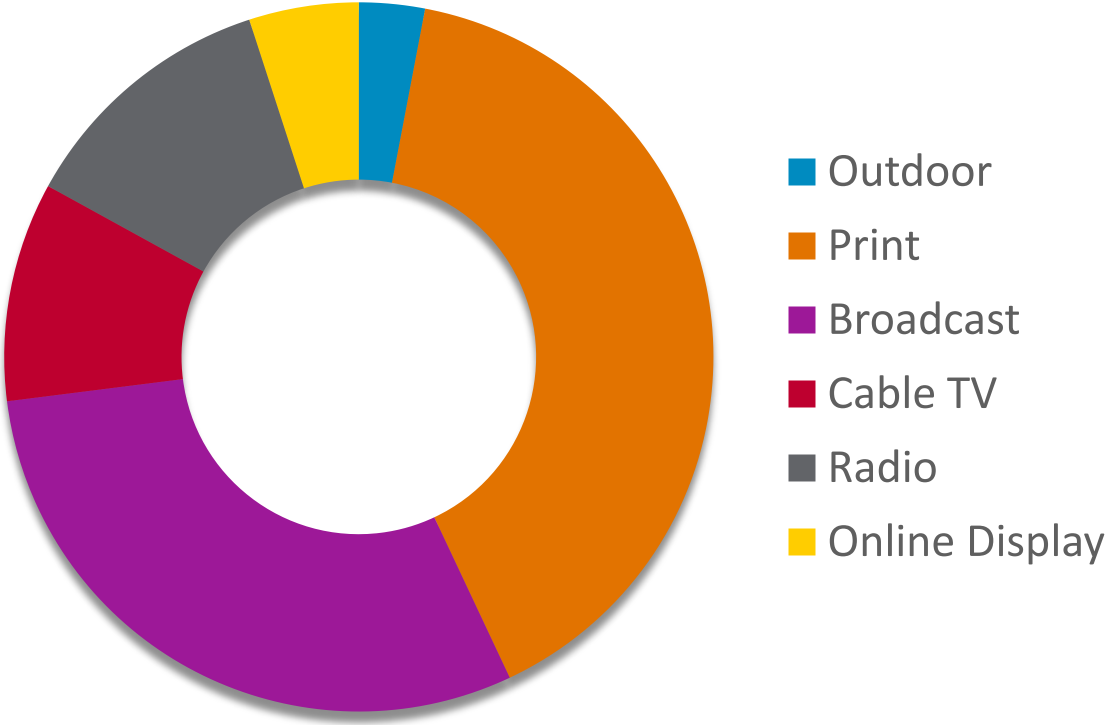
#INTERACT13

The changing shape of Media

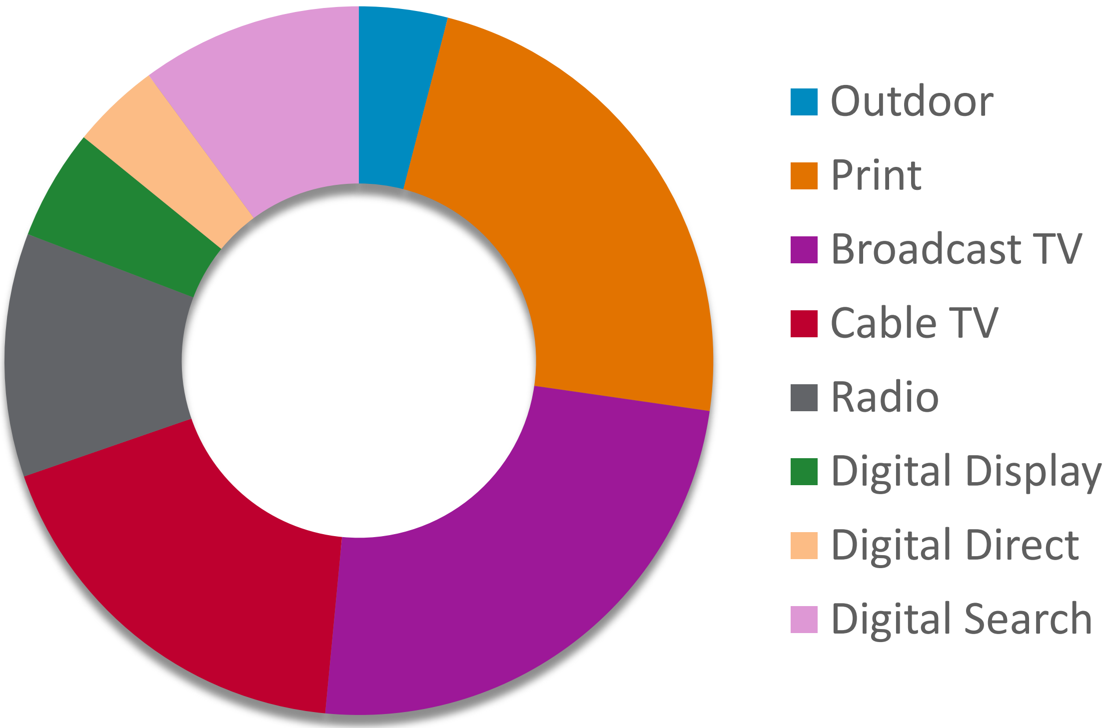
AD SPEND PRE-1950



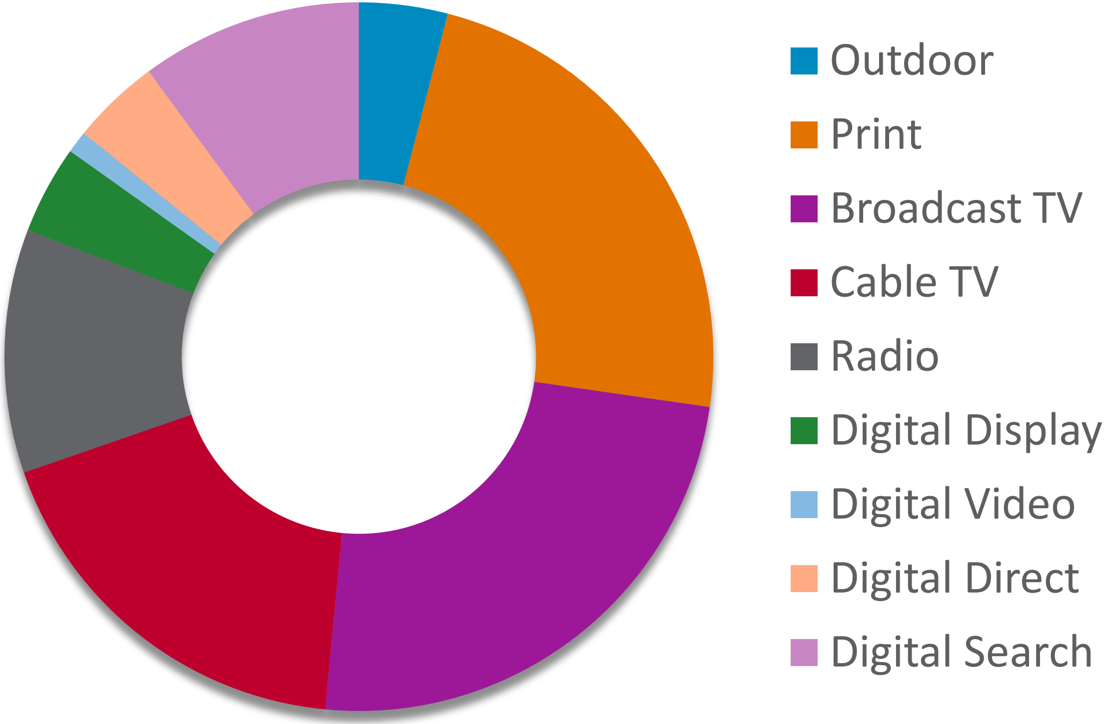
AD SPEND PRE-2000



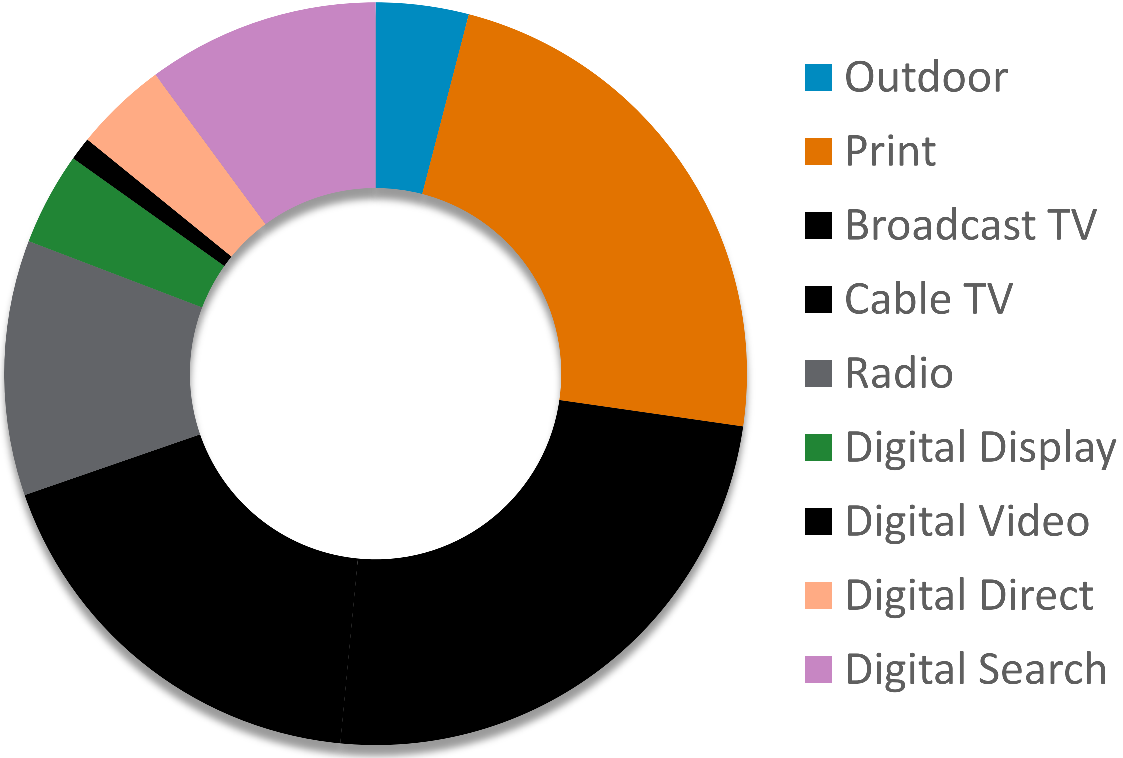
AD SPEND PRE-2010



AD SPEND PRE-2013



AD SPEND 2013 – VIDEO FORMAT



VIDEO RISING

VIDEO ON DEMAND

29%

of US tablet owners have streaming video households

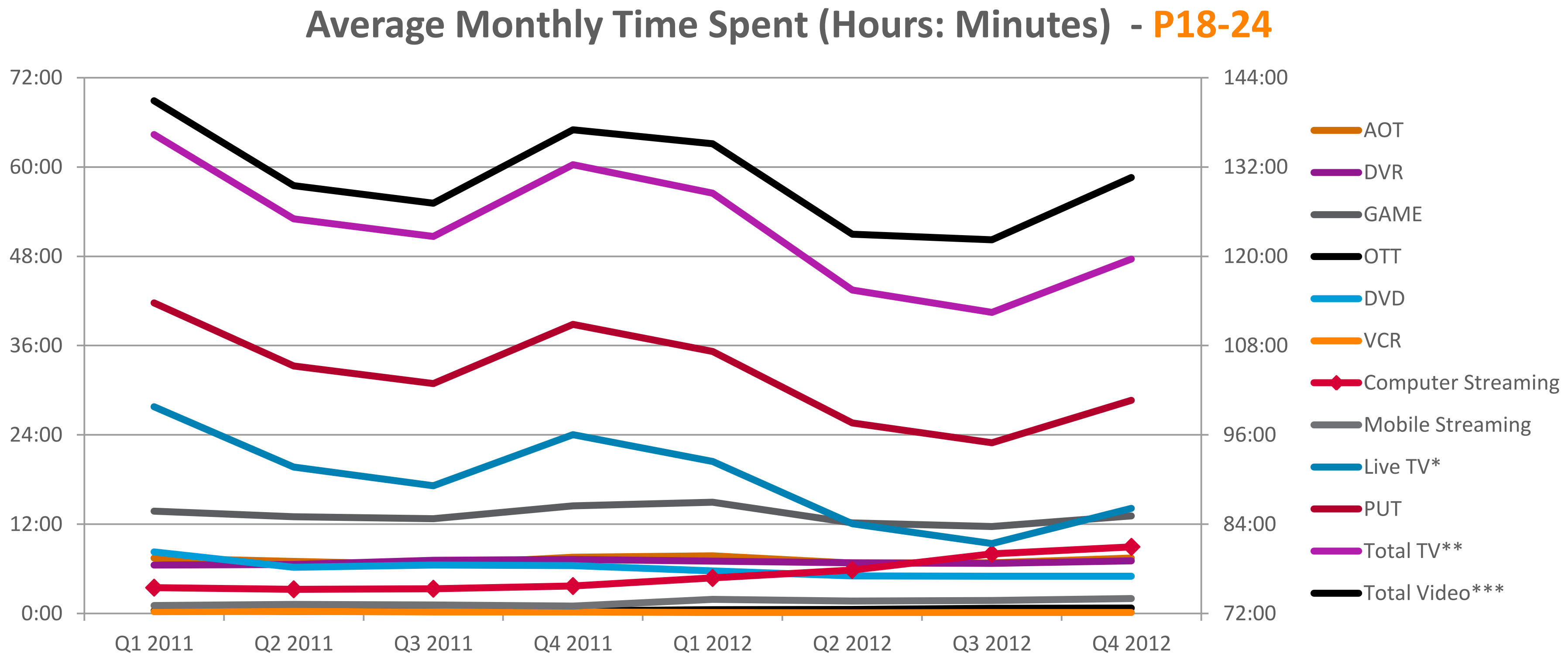
VIDEO ON DEMAND

17%

of Chinese smartphone users watch videos on their phone more than 3x per day

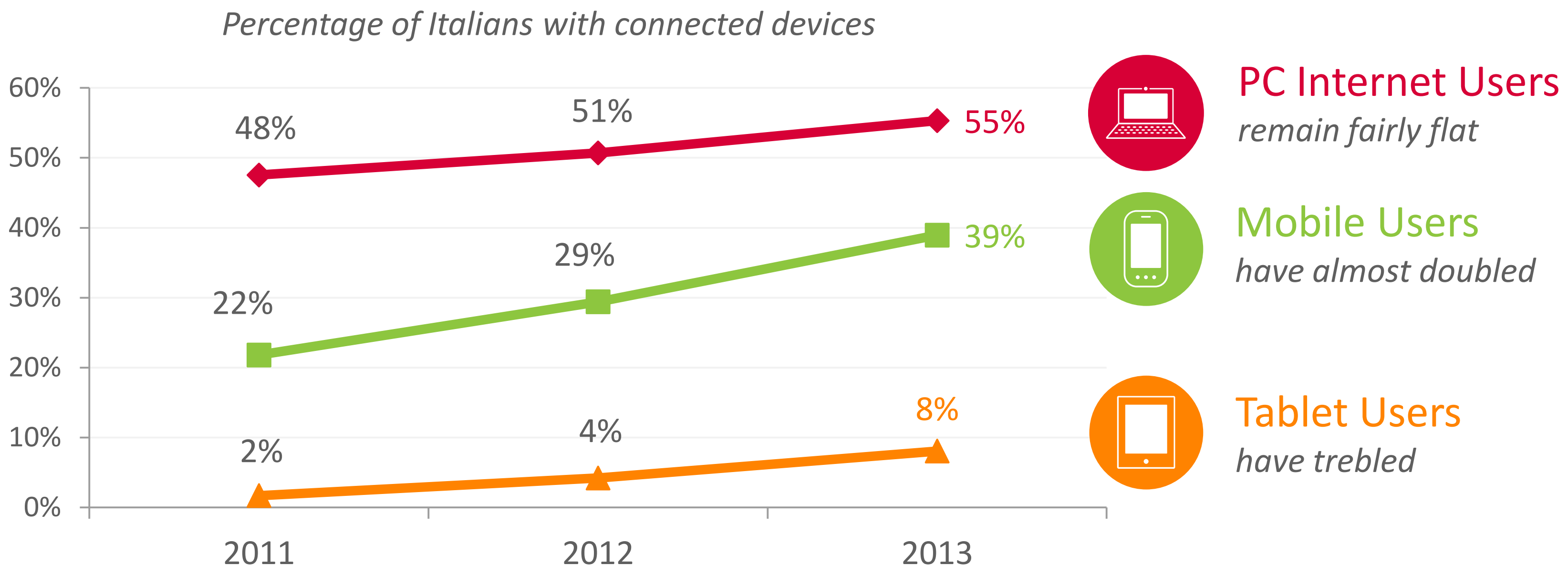
Nielsen's Mobile Consumer Report 2013

YOUNG ADULTS ARE STREAMING MORE



Monthly time spent averaged across all US persons ages 18-24. PUT, Live TV, Total TV, and Total Video are charted on the right axis.
*Live TV is the result of PUT minus AOT and DVR. **Total TV Includes Live+7 TV, and viewing on the television screen from any connected device.
**Total Video Includes all viewing on a television screen and streaming on a computer and/or a smartphone.

FRAGMENTATION CONTINUES



ADOPTION IS UP

SMART-
PHONE

51%

UP
34%
LAST 12
MOS

GAME
CONSOLE

46%

UP
1%
LAST 12
MOS

TABLET

14%

UP
400%
LAST 12
MOS

IPTV

25%

UP
25%
LAST 12
MOS

INTERACT
BARCELONA
2013

Nielsen Cross Platform Report 2012

iab europe

5 MILLION

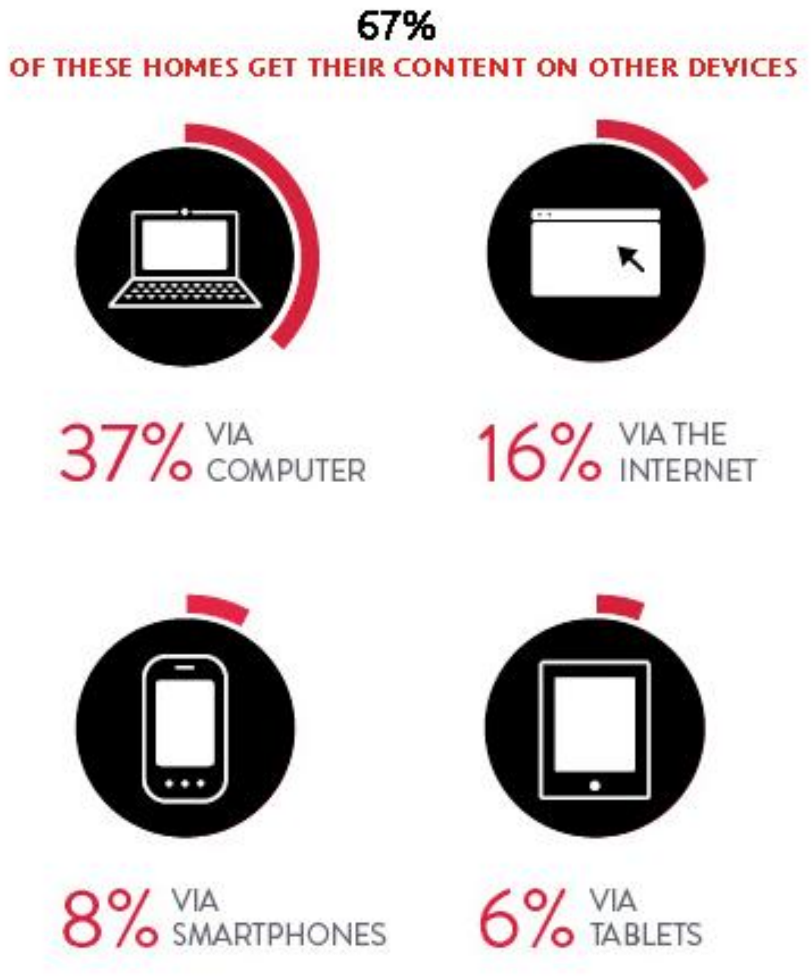
US HOMES

HAVE A

DIFFERENT

“TV”

EXPERIENCE



MORE DEVICES, MORE COMPLEXITY

CLOUD DVR

TABLET TV APPS

INTERNET ENABLED TV

INTERNET CONNECTED TV

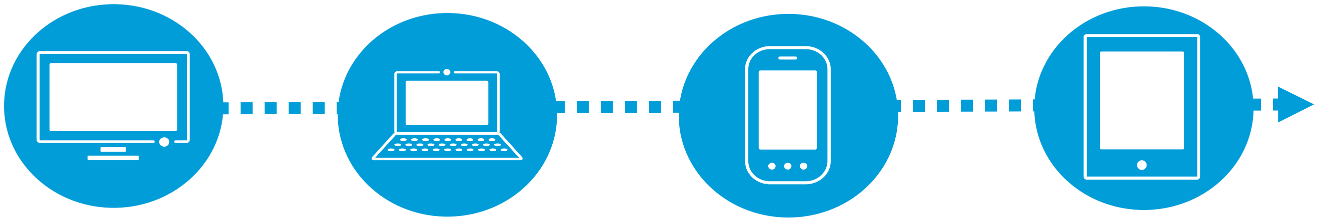
EARLY MOBILE VIDEO

ONLINE VIDEO FOR PC

Time

TAKING ADVANTAGE

TELEVISION **ONLINE** **SMARTPHONE** **TABLET**



WATCH
ABC
LIVESTREAM

LEADS TO PURCHASE

8%

of internet users shop online in Italy

That's 2.7 million people

11%

of smartphone owners shop on their phone

That's 3.7 million people

25%

of tablet owners shop on their tablets

That's 1.2 million people

GLOBALLY,
DIGITAL IS
INFLUENCING
WALLETS...

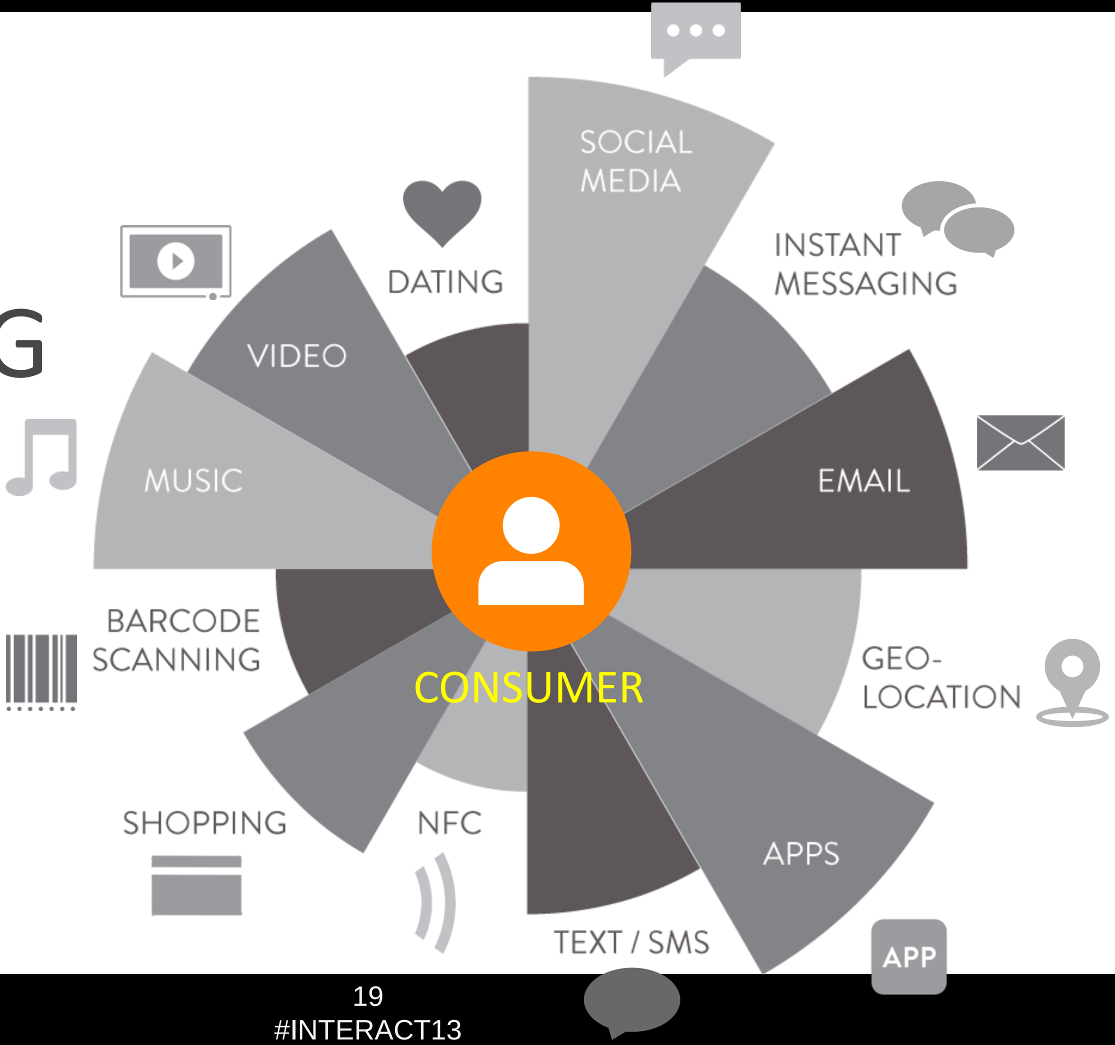
Source: Nielsen Global Survey of New Product Purchase Sentiment, Q3 2012

WHY CROSS-PLATFORM MEASUREMENT IS REACHING A FEVER PITCH

EXPANDED VIEWING:

A SINGLE GRP

COMPETING WITH **MORE** PLAYERS



WHAT ARE WE SEEING IN THE UK?

UNDER 50%

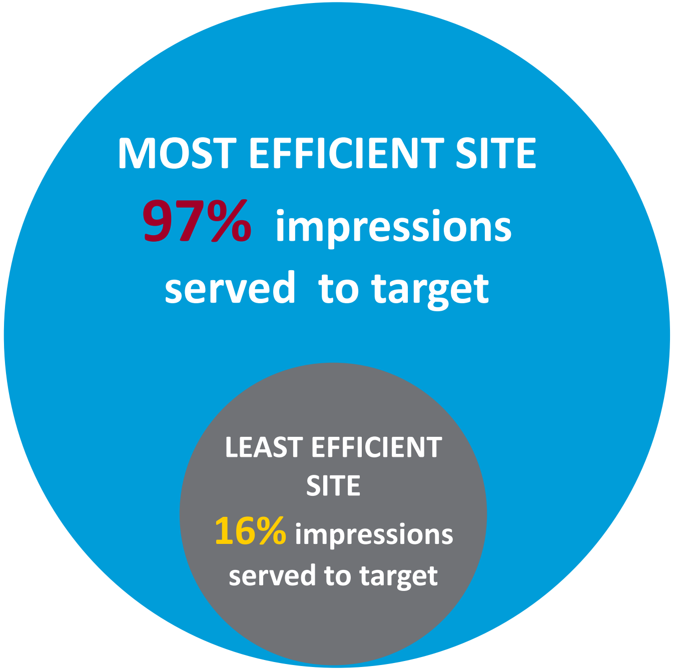
of all impressions are served to the

TARGET AUDIENCE

The **VARIANCE** between publishers is significant

In isolated cases impressions continue to be

SERVED OUTSIDE THE UK



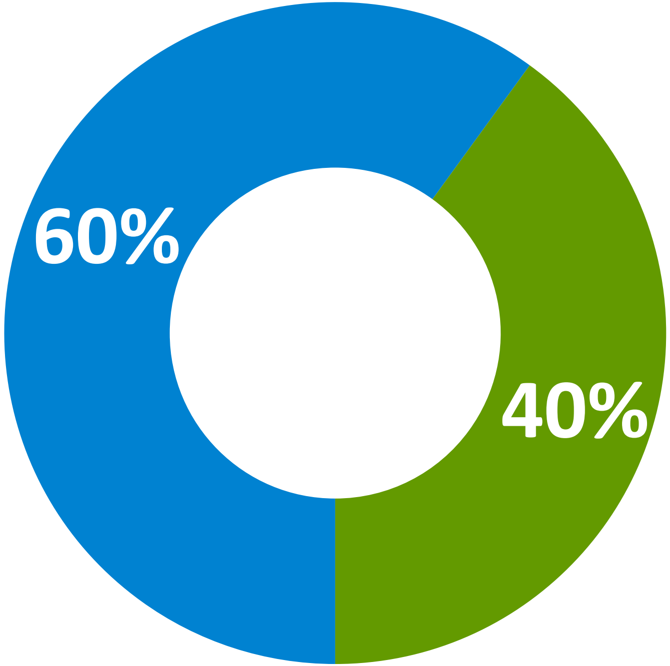
REPRESENTING THE BRAND

WHAT CROSS-PLATFORM ADVERTISERS WANT

Objectives stated for Nielsen Cross-Platform Campaign Ratings campaigns

INCREMENTAL REACH

We wanted digital to pick up where our TV buy left off… reaching P12-18



MAXIMIZE EXPOSURE ON TV + ONLINE

Our objective was to reach our intended audience, M18-34, from every angle

THREE SIMPLE QUESTIONS

REACH

Did the right people see it?

RESONANCE

Did they like it?

REACTION

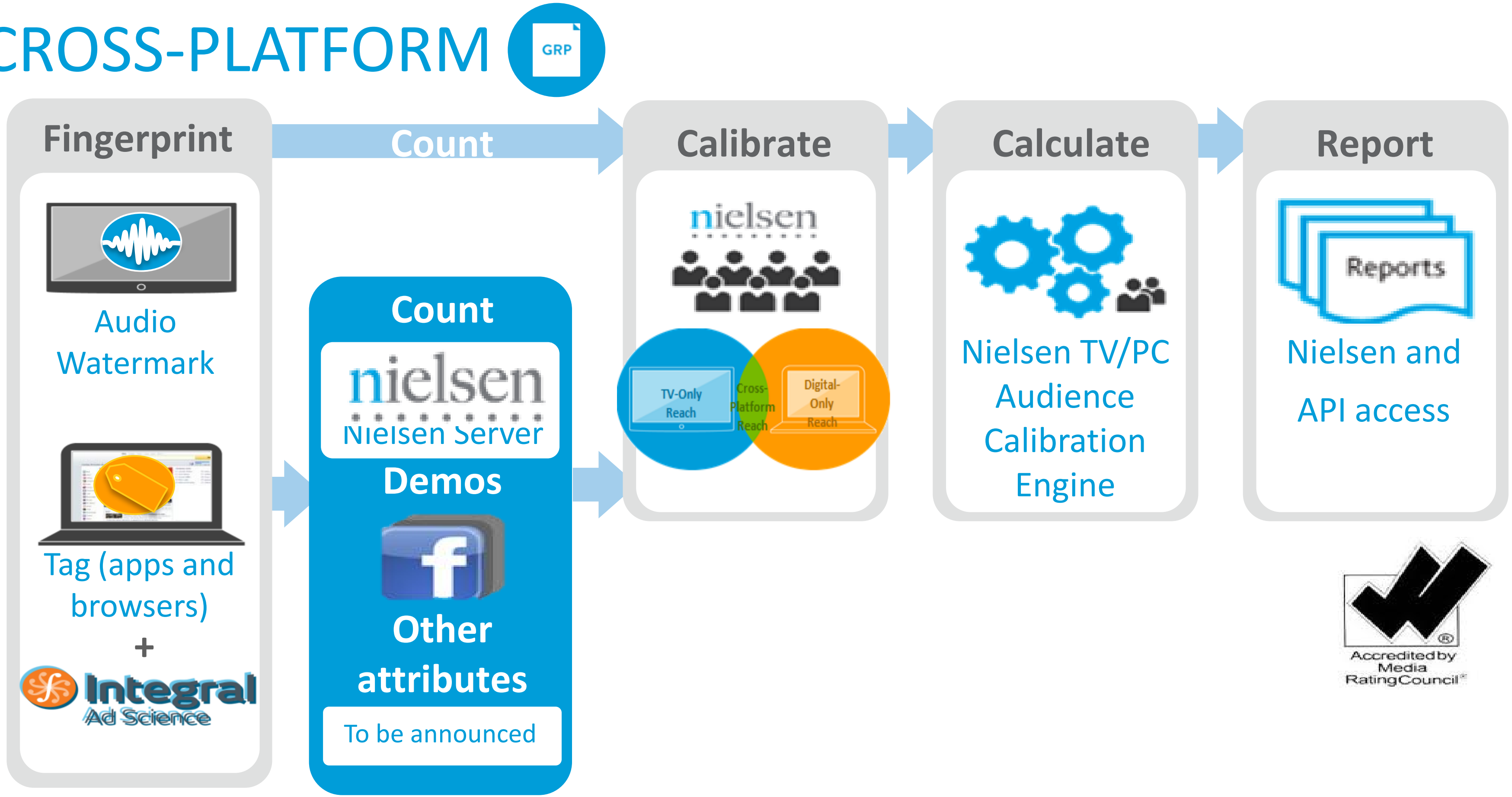
Did they respond to it?

REACH

Did the right people see it?

CONTENT/ PROGRAM	ADVERTISING	PLANNING
Publisher/Broadcaster to promote Advertising space	*Advertiser for Campaign Accountability cross media*	*Agency and Trading Platforms for currency trading*

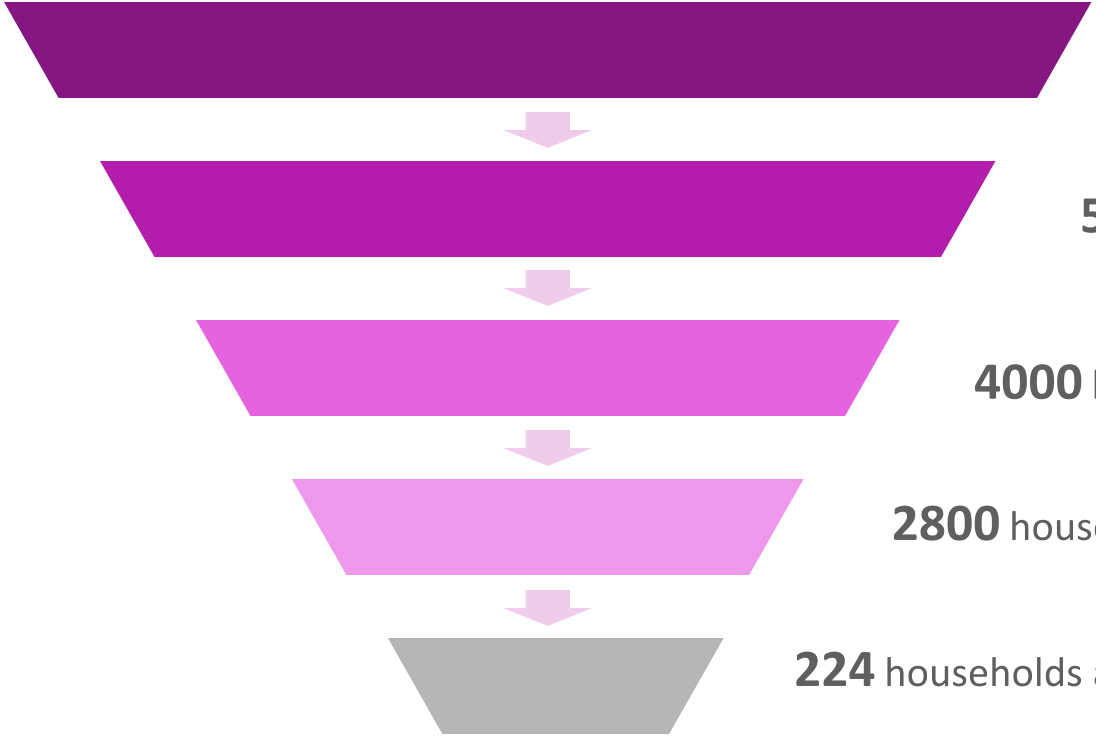
CROSS-PLATFORM



* Nielsen Online Campaign Ratings is accredited by the Media Ratings Council (MRC); featured elements like DMA, verification and viewability are also under MRC review. Nielsen Cross-Platform Campaign Ratings is currently under MRC accreditation review.

SINGLE SOURCE VS. FUSION

SINGLE SOURCE VS. FUSION



20,000 TV households

5,000 households surveyed

4000 households online

2800 households willing to be re-contacted

224 households agree to become part of PC panel

SO, WHAT ARE THE 4 POINTS TO REMEMBER?

1. Content reigns
2. Compare across screens now
3. Consistency is key
4. Complete the picture

THANK YOU

MEGAN.CLARKEN@NIELSEN.COM