

November 2009

I-Com Portugal Roundtable



Lisbon, Portugal

comScore: A Technology Firm in the Market Research Business

- **The clear leader and innovator in digital audience measurement**
 - **Corporate headquarters: Reston, Virginia (USA)**
 - Offices in London, Paris, Tokyo, NYC, Chicago, San Francisco, Seattle, Toronto, Sao Paulo etc.
 - **Year founded: 1999**
 - **Successful IPO (NASDAQ: SCOR)**
 - **Number of clients: 1,200+**
 - **Acquired M:Metrics in May 2008**
 - **The world's most recognized source for Internet audience intelligence**
 - monthly reporting on almost 40 countries, world-class interface & analytical tools
 - hundreds of custom research studies realized each year for advertisers, publishers
 - leading source for US e-commerce data, online behavior, video, mobile, widgets etc.
 - comScore is cited almost daily in the media, both in the US and around the world
 - **Company-wide renewal rate well over 90%**
 - **100% digital DNA**
- Current employees: 500+**
June 26, 2007
(200+ advertising agencies)

History of Leadership in Digital Marketing Measurement



External Recognition



WORLD ECONOMIC FORUM
Technology Pioneer
2007

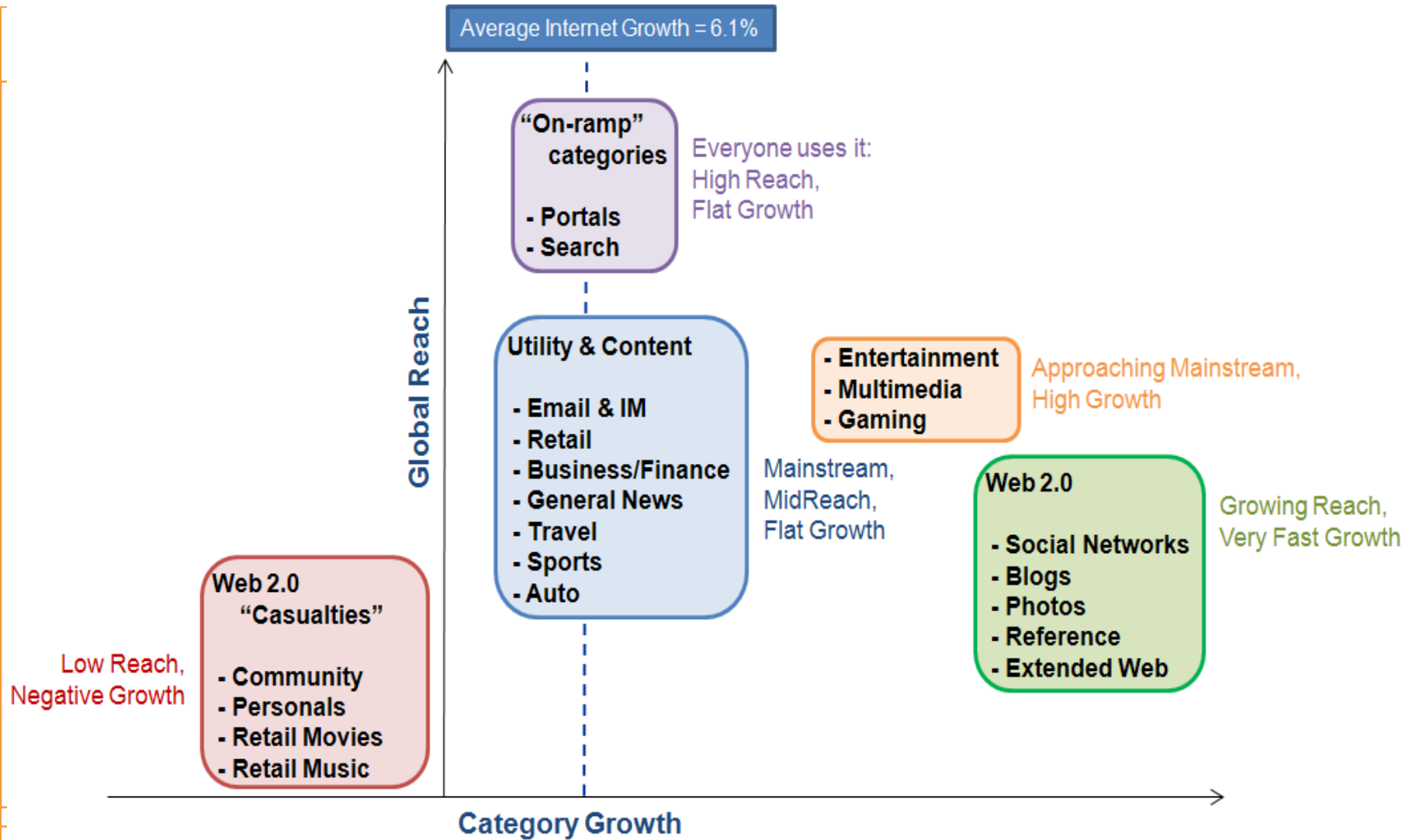


Top 100
Innovative Companies
December 2004



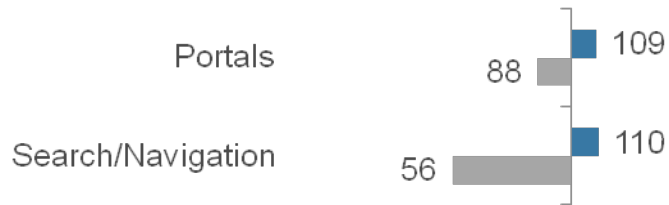
Fastest Growing
Global Research Firm

How the World Uses the Internet

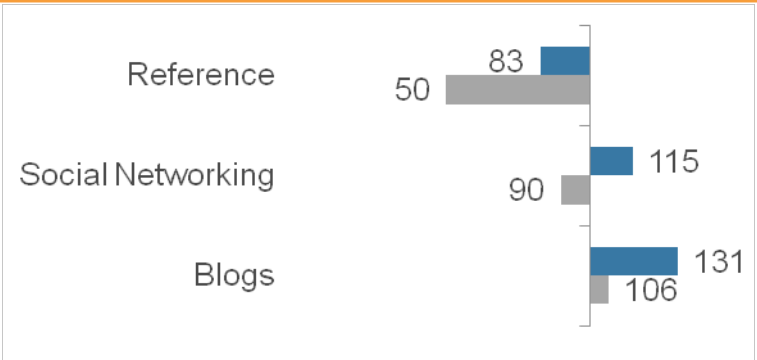


How the Internet Audience in Portugal Indexes for Key Categories

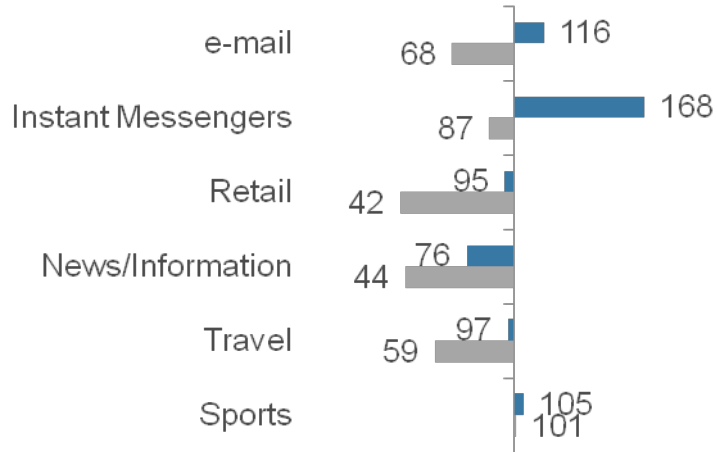
“On-ramp” Categories



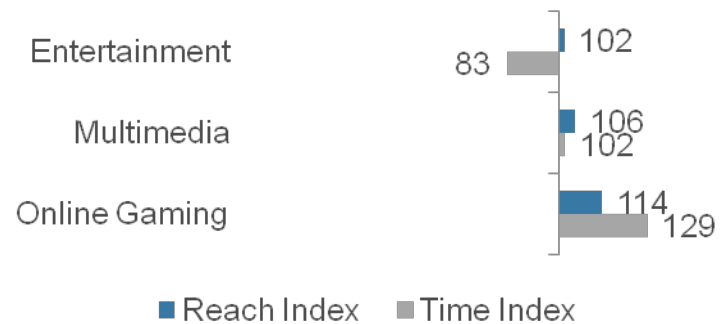
Web 2.0 Categories



Utility & Content Categories



Entertainment Categories

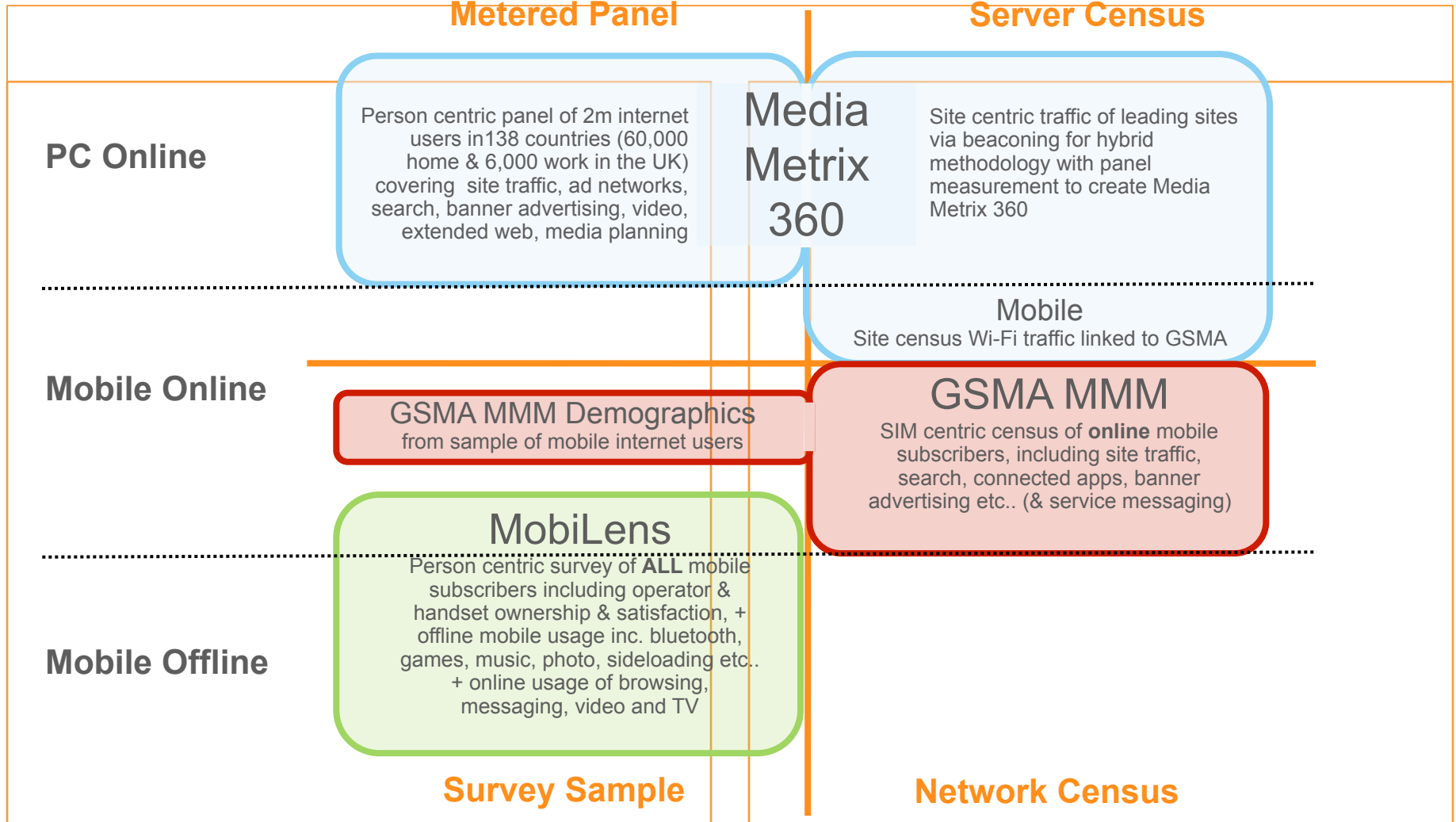


■ Reach Index ■ Time Index

Measuring The Digital World

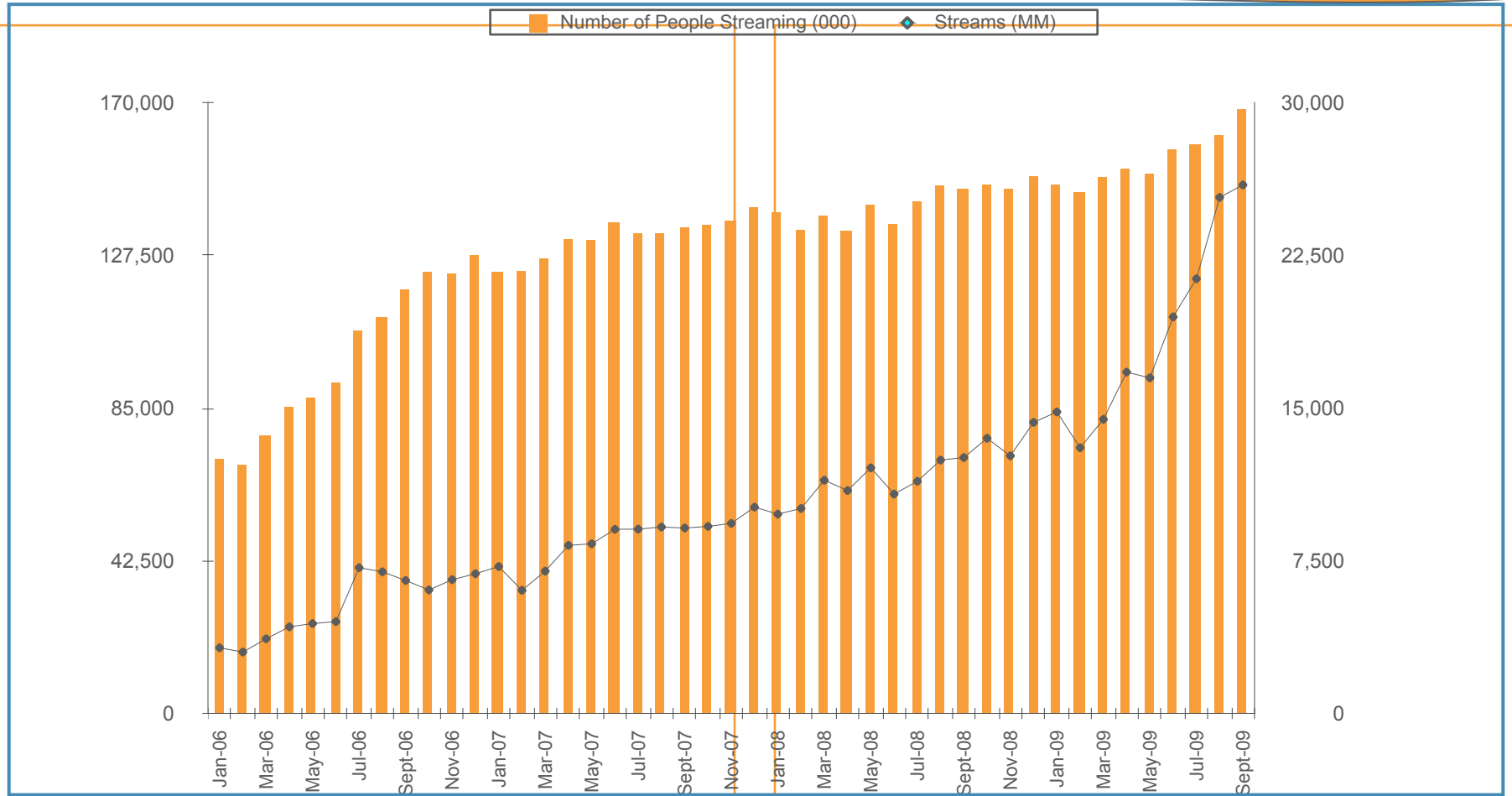
- comScore measures more than 2M individuals **Internet users** worldwide
- **Thousands of different sites and web domains reported each month**
 - Large panel needed to minimize volatility, measure long tail etc.
 - “Most measurable of media” allows for everything from behavioral/affinity analysis, ecommerce tracking, advertising effectiveness research etc.
- **Mobile audience measurement is done via survey, census data or meter**
 - GSMA partnership in UK in 2009, M:Metrics acquisition in 2008
 - Increasing Internet use seen from mobile devices, mostly on-ramp content
- **As TV becomes increasingly digital, comScore aims to assist the industry in tackling three screen measurement**
 - Already measuring video streaming activity with panel + census approach
 - In active discussions with industry leaders, cable TV providers, IPTV players

Next Generation Media Measurement: Online+Mobile & Panel+Census



Video Consumption Shows Continued Growth, with September 2009 reaching over 25.9 Billion Streams in the US Alone

Video audience in US in Sept 2009 was 168M

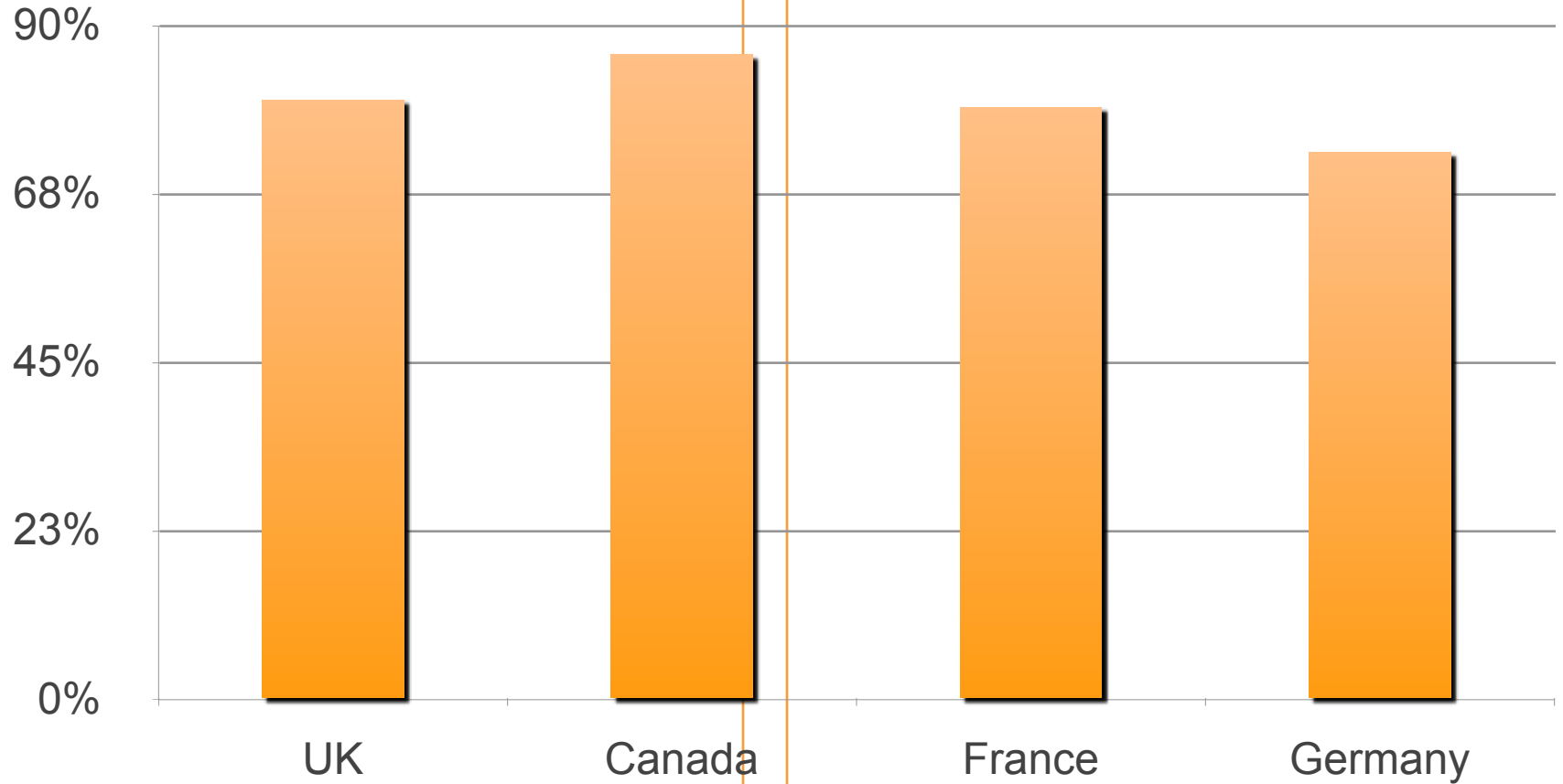


*FLV Measurement was added in July, 2006 driving a large part of the incremental growth versus June and prior months.

**Fox Interactive Media was not included in the November report due to an unusual implementation of an RTMP on MySpace which did not allow us to accurately distinguish video streams from audio streams.

And Big Elsewhere by Reach As Well...

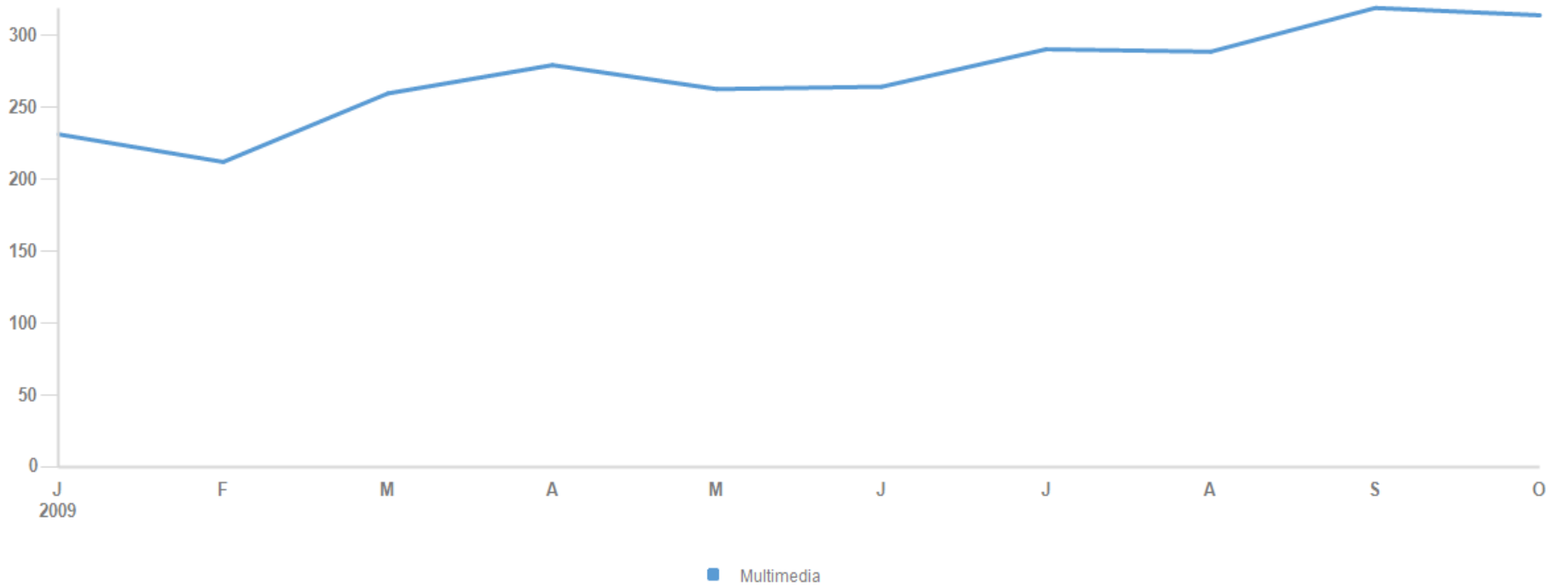
Percentage of online population who streamed video



In Portugal, Time Spent in Multimedia Category Increasing Rapidly

- Increased almost 40% just since January

TOTAL MINUTES (MM)



Created: 11.24.2009

© comScore Inc.

Will Online Video Eat TV? Not Likely

- The scale and potential is different
- The type of content consumed online is not necessarily the same content that is most popular in viewing on TV

Some Leading Categories for TV

- Sports Events
- Drama
- News
- Science Fiction
- Comedy
- Reality/Talent

Some Leading Categories for Streaming

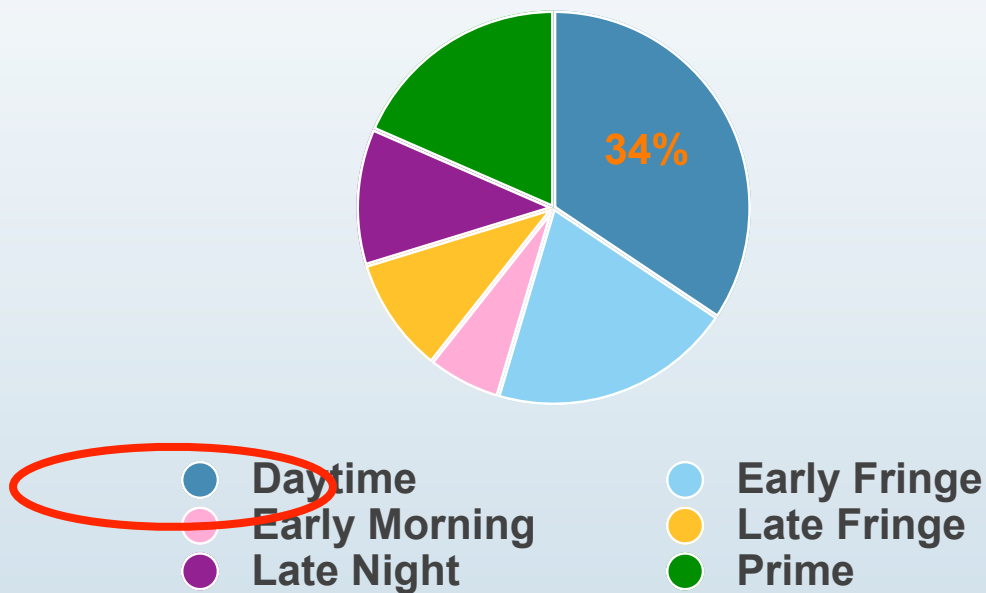
- Entertainment - Multimedia
- Entertainment - News
- Sports
- Adult
- Animation/Cartoon
- News/Information

Streamers are most likely using online video as a complement to television and a convenience factor – not a replacement

A Quick Look at Dayparts for Online Streaming

- Most videos are watched during the Daytime, not during primetime

Weekday Video Streaming Summary



The Three-Screen Challenges

- **All three screens need to be measured well individually before convergence**
 - Two screen measurement presents challenges, but progress being made
 - TV audience increasingly fragmented: HD, digital etc.
- **Which methodology to use?**
 - Surveys? Metered panels? Census-level data?
 - Single-source measurement would require a large and representative panel
 - Calibration and convergence panels are being actively explored
- **TV is becoming more and more digital**
 - Tremendous reach, but approach to measurement has been in place for years
 - Easier to steer a yacht than it is a cruise ship
 - TV will become easier to measure as it catches up with “the digital revolution”
- **Cost of researching an effective currency for any media is approximately 1% of the total advertising spend on that media overall**
 - What does this mean in terms of costs?
 - GRPs and Reach/Frequency metrics will continue to prove reliable

What Does All This Mean?

- **Accurate Internet audience measurement is challenging**
 - Requires very large panel, passive measurement
 - Panel-centric data aids in effective planning, offers useful metrics
 - Now including census-level data
- **Mobile measurement (and activity) is advancing quickly**
 - Adoption of smart phones and 3G just the next step
 - Metered and census-level data both useful in understanding audience
 - PC/Mobile cross-media measurement rapidly advancing
- **Single-source measurement of three screens a challenge, but inevitable**
 - Growing pains sure to exist during “digitalization”, but work underway
 - comScore measures the digital world and, more and more each day, that digital world includes TV
 - Industry demand, willingness and research capabilities all exist
 - Expect progress in 2010 (white papers, joint research reports and more)

Start your engines.
The industry is about to advance.

From Zero to 360


TURNKEY HYBRID AUDIENCE MEASUREMENT SOLUTION

Announcing a streamlined solution for data reconciliation that takes you from measurement full circle. **Get it**

Visão geral de imprensa e eventos

Press releases

Blog

Eventos e seminários Web

Apresentações e documentos

comScore Apresentações e documentos

Kit de mídia

Junte nossa lista de e-mail

Política de uso de dados

Medindo o mundo digital
comScore é a fonte global de inteligência de mercado digital e o serviço predileto de medição.

LEARN MORE >

IN THE NEWS:

Press releases

- 93 Percent of Internet Users in Turkey Visited Google Sites in September 2009
Quarta-Feira, Novembro 11 2009
- PayPal Holiday Season Promotions Boost Payment Method's Share of Dollars at Major Retailer Sites
Segunda-Feira, Novembro 9 2009
- Microsoft Sites Captures Largest Share of Time Spent Online Worldwide

Produtos e serviços

- Planejamento e análise de mídia
- Eficácia da publicidade
- Marketing de busca
- Mídia em celulares
- Medição entre mídias
- Medição de vídeo e mídia distribuída
- Marketing na Internet
- Rastreamento de tecnologia

Escolha um produto...

Media Metrix 360

STAND UP AND BE COUNTED

Full Universe

372.4	364.9	7.5
Total	Home + Work	Other

Measured in Total Pages Viewed (MPV)

Eventos e apresentações

Próximos eventos

- Journalism and the New Media Ecology: Who Will Pay the Messengers?
Sexta-Feira, Novembro 13 2009

VEJA MAIS >

Próximos seminários Web

- Display Advertising Heats Up! Competitive Insights from Ad Metrix
Quinta-Feira, Novembro 12 2009