The Digital Consumer Will Shape the New Brave New World

Why Digital? Why Now and How?

President cMM Canada: comScore Inc.
Brent Lowe-Bernie
Did you know…

Online Video Reaches Over 90% of Canadians on the Web

Table of Contents

1. Who is comScore Inc.?
2. Opening Principle
3. Media Usage Patterns in Canada
4. How technology is changing audiences:
   1. Social Media
   2. Online Video
   3. Multi-screening
5. Audiences are changing how we need to tell stories:
   The opportunity for media-makers, and story-tellers
Who is comScore Inc.?
comScore, Inc.

- Founded in 1999
- Corporate headquarters: Reston, VA
  - Offices in Chicago, NYC, San Francisco, Seattle, Toronto, London, & Tokyo
  - 500+ full-time employees
  - Award winning & one of the fastest growing global research firms
  - Publically traded company on the Nasdaq
- Experienced senior leadership team with an outstanding record of innovation in the market research industry
- Created the only continuous survey panel that also passively captures all web-wide behavioral and transaction data for a sample of 2 million people
- More than 1,100 clients
What We Do….

- We are the largest provider of digital marketing intelligence, using a platform that helps our customers make better-informed business decisions and implement more effective digital business strategies.

- We measure the continuous online activity of 2 million people globally who have granted us explicit permission to confidentially measure their Internet usage patterns.

- Our products and solutions provide our customers deep insights into consumer behavior, both online and offline.
The Only Global Measurement of Audience and e-Commerce

41 Media Metrix Reported Countries

172 Countries with Sample Presence

360° View of Consumer Behavior

- Web Visiting and Viewing
- Online Transactions
- Demographics Life Stages
- Streaming Video
- Search Behavior
- Media Exposure

Data Sourced From comScore’s Global Panel of 2MM Users Worldwide
comScore: A History of Leadership in Digital Marketing Measurement

External Recognition

- WORLD ECONOMIC FORUM Technology Pioneer 2007
- Top 100 Innovative Companies December 2004

To Measure the Search Market (qSearch)
To Deliver a Worldwide Internet Audience Measurement (World Metrix)
To Measure Video Streaming (Video Metrix)
To Provide Behavioral Ad Effectiveness (Campaign Metrix)
To Meter Cell Phones
Unified Measurement Globally (Panel + Server)
To Build and Project from 2M+ Longitudinal Panel
To Monitor and Report eCommerce Data
Opening Principle
Opening Message: Technologies change audiences, and audiences change how we tell stories

- Super distribution
- Fragmentation
- Experimentation
- Transmedia

• From passive viewing, to active engagement
• From program times to personal - time (and place, and platform)
### Persons of All Ages Still Grasping onto their Traditional Media…Online Content is still King and Queen

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Music Category</th>
<th>Newspapers Category</th>
<th>TV Category</th>
<th>Radio Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Persons: 2+</td>
<td>15,215</td>
<td>14,155</td>
<td>13,236</td>
<td>6,743</td>
</tr>
<tr>
<td>Persons: 2-17</td>
<td>3,479</td>
<td>2,145</td>
<td>2,402</td>
<td>1,007</td>
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<tr>
<td>Persons: 18-24</td>
<td>1,698</td>
<td>1,216</td>
<td>1,253</td>
<td>619</td>
</tr>
<tr>
<td>Persons: 25-34</td>
<td>2,799</td>
<td>2,606</td>
<td>2,534</td>
<td>1,360</td>
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<tr>
<td>Persons: 35-44</td>
<td>2,770</td>
<td>2,913</td>
<td>2,696</td>
<td>1,427</td>
</tr>
<tr>
<td>Persons: 45-54</td>
<td>2,346</td>
<td>2,634</td>
<td>2,259</td>
<td>1,263</td>
</tr>
<tr>
<td>Persons: 55+</td>
<td>2,123</td>
<td>2,642</td>
<td>2,092</td>
<td>1,066</td>
</tr>
</tbody>
</table>

Source: comScore Media Metrix, Canada, All Locations, January 2010
Canada is the Highest Penetrated Country
We View the Most Content and Spend the most Time

Source: comScore Media Metrix, Persons 15+, All Locations, January 2010
Canadians Rapidly Spending More Time Online Viewing Video

Source: comScore Inc. MMX and VMX, Canada – All Locations November 2008 - 2009
Video Is A Key Driver in Time Spent on the Web Across All Demos Especially 2-17 and 18-24

Source: comScore Inc, VMX, Canada, August 2008 September 2009 Average - All Locations,
How technology is changing audiences…

Social Media
Online Video
Multi-screening
Social networking can be used to find and nurture audiences… in Canada, and in the rest of the world

Social Networking attracts a worldwide audience of over 830.9 million Unique Visitors and continues to be a growing trend

*Source: comScore, Inc., MMX Worldwide (Worldwide Ages 15+), All Locations, December 2009
Social media audiences drive traffic to traditional media sites
Social Networking Visitors are Getting their Complete Entertainment Fix Online in Canada

90% of Entertainment Visitors are Heavy Social Networking Users
### Different Age Groups …Different Communities

<table>
<thead>
<tr>
<th>INDEX</th>
<th>Blogger</th>
<th>Facebook</th>
<th>Flickr</th>
<th>LinkedIn</th>
<th>Myspace</th>
<th>Six Apart</th>
<th>Twitter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Persons: 2-17</td>
<td>114</td>
<td>111</td>
<td>112</td>
<td>30</td>
<td>151</td>
<td>115</td>
<td>102</td>
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<tr>
<td>Persons: 18-24</td>
<td>113</td>
<td>114</td>
<td>112</td>
<td>57</td>
<td>137</td>
<td>119</td>
<td>98</td>
</tr>
<tr>
<td>Persons: 25-34</td>
<td>108</td>
<td>109</td>
<td>107</td>
<td>114</td>
<td>105</td>
<td>99</td>
<td>107</td>
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<td>Persons: 35-49</td>
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<td>151</td>
<td>87</td>
<td>99</td>
<td>109</td>
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<tr>
<td>Persons: 50+</td>
<td>79</td>
<td>81</td>
<td>82</td>
<td>105</td>
<td>55</td>
<td>82</td>
<td>85</td>
</tr>
</tbody>
</table>

Source: comScore Media Metrix, Canada, December 2009
Online Video Arrives & Thrives!
And Canadian video audiences are also ready for primetime, with video reach in Canada among the highest in the world.

Source: comScore Inc, VMX, Canada November 2009 – 3 month average, All Locations.
Canadians Increasingly Spending Time Watching Videos In the Entertainment Category

Avg. Minutes per Viewer Spent Streaming Video on Entertainment Sites
Up 114% Y/Y

Source: comScore Inc. Canada – All Locations November 2008 - 2009

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… its mostly entertainment video

![Bar chart](chart.png)

**Videos (000)**

- **Entertainment**: 3,430,423
- **Portals**:
- **News/Information**:
- **Services**:
- **Conversational Media**:
- **Sports**:
- **Games**:
- **Retail**:
- **Community**:
- **Search/Navigation**:

**Source**: comScore Inc, VMX, Canada November 2009, All Locations.
With particular success on Canadian Media Properties

Source: comScore Inc, VMX, Canada November 2008 - 2009, All Locations,
And it’s already happening, for Canadian TV content online

Canadians Streaming More Video on Media Company Sites in 2009

Top 20 Properties Streaming Videos: November 2008

* Google Sites #1: 1,175,912,000 Videos

Microsoft Sites
VIDEODEG.COM
Yahoo! Sites
CTVglobemedia
DAILYMOTION.COM
Viacom Digital
MEGAVIDEO.COM
FACEBOOK.COM
Turner Network
Break Media
VEOH.COM
Fox Interactive Media
Best Buy Sites
Canoe Network
Canwest Digital
Metacafe
CBS Interactive
ZSHARE.NET
BRIGHTCOVE.COM

Source: comScore Inc, Canada November 2008, All Locations,

Top 20 Properties Streaming Videos: November 2009

* Google Sites #1: 2,859,284,000 Videos

Microsoft Sites
MEGAVIDEO.COM
FACEBOOK.COM
ZSHARE.NET
CTVglobemedia
DAILYMOTION.COM
VIDEODEG.COM
Yahoo! Sites
Canwest Digital
Turner Network
Viacom Digital
Break Media
Fox Interactive Media
CBC-Radio Canada Sites
JUSTIN.TV
Best Buy Sites
Canoe Network
Corus Interactive Sites
Tudou Sites

Source: comScore Inc, Canada November 2009, All Locations,
Audiences are changing how we need to tell stories:

What are the opportunities for story tellers and brands?
1) Engage more deeply with your core TV audience
2) Find new audiences and drive them back to watch you on TV
3) Find new audiences and entertain them, wherever they are

Leverage All The Distribution Channels!
Multi-screening becomes ubiquitous

- Only 4% of the US online population say that they never use a computer while watching TV
- We can view this as fragmentation… or opportunities to engage more deeply with our audiences where they are already spending time
Case Example: Canadian Media Companies
Significant Portions of Their Traffic View Videos on Their Properties

<table>
<thead>
<tr>
<th>Total Unique Viewers (000)</th>
<th>Total Unique Visitors (000)</th>
<th>% of Visitors Viewing Videos</th>
</tr>
</thead>
<tbody>
<tr>
<td>36.5%</td>
<td>11.7%</td>
<td>23.0%</td>
</tr>
<tr>
<td>19.7%</td>
<td>32.5%</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Source: comScore Inc, MMX - VMX, Canada November 2009, All Locations,
For original TV programs, audiences are increasingly tuning in online to catch up on missed episodes… and some watch online only

- Missed episode on TV: 65%
- Convenience: 31%
- Less ads: 29%
- Like to see past episodes: 16%
- Prefer the online experience: 12%
- Don’t subscribe to cable/don’t have a TV: 6%
- Other: 1%

TV+Online Viewers: 29%
TV-Only Viewers: 65%
Online-Only TV Viewers: 6%

‘The future of original TV Viewing and the new digital consumer’ was a survey conducted by comScore in December 2009.
Facebook usage is surprisingly similar on mobile and PC

mobile users spend 252.4 minutes on facebook, average 7.8 usage days per month.

PC users spend 182.8 minutes per month; average 9.1 Usage Days per month
Frequency of use on TWITTER.COM greater with Mobile Devices than PC

Visits per Visitor

PC: 4.7  Mobile: 10

Top OEM Brands Using Twitter.com

- RIM holds the most Twitter.com users
- 7.1% of RIM and Apple Owners Tweet

Amount of Projected Subscribers

- Apple
- Motorola
- Samsung
- LG
- RIM

comScore Inc. Mobile Metrix – August 2009 – Symbian, MS, and Palm OS
Five Key Takeaways

- Media usage habits are changing and there are more mediums than ever per target group.
- Relevancy and timeliness drives platform choice and multi-device usage.
- Think, plan and weave cross platform thinking in from the beginning of concept development.
- Embrace the Canadian opportunity in social, online and mobile media.
- Measure your total program results, learn and get smarter on how to be successful with your reaching your audiences.
Thank You

Questions??

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