



## Total View: Measuring the Changing Video Landscape

### Findings from a comScore/Coalition for Innovative Media Measurement Proof of Concept Research Project to Develop a New System for Cross Platform Measurement in the U.S.

#### Introduction

Leading media brands, including both broadcast and cable networks, are providing consumers with more choice in how they consume video than ever before. The media industry has migrated quickly from a “TV” business to a “Total Video” business, as consumers have more control over when they use video and how.

Leading broadcast and cable networks are on the forefront of this innovation. Video content is available on smartphones and tablets through branded apps as well as “TV Everywhere” apps provided by MVPDs – multichannel video programming distributors including cable, satellite and telco operators. Video libraries are being expanded – broadcast and cable networks are making even more video content available via VOD – and the ecosystem is being further complicated by SVOD providers like Netflix and content owners making their own over-the-top “OTT” apps.

Consumers, simply put, have a wider selection of video choices than they have had at any time in our media history. The great disrupter has been the Internet and the rapid adoption by consumers of smartphones, tablets and other connected devices. Of course, millions of consumers continue to watch video on a “live” basis using the traditional TV set, but consumers who connect with content via mobile devices, Smart TVs, Apps, OTT, VOD and DVR represent an important and growing segment of consumers.

CIMM realized early on that measurement systems need to be adapted and evolve from a “TV” measurement system to a cross-platform measurement system. CIMM initiated a series of cross-platform measurement pilot studies designed to bring true cross-platform measurement to the marketplace.

These studies helped detail that while the prevailing belief is that there have been “declines” in television viewing, video viewing is actually stronger than ever. Therefore,

were such perceived declines real, or were they a function of inadequate and incomplete measurement? The cross-platform measurement research and development studies piloted by CIMM showed that when accurate measurement was applied, counting all video consumption, the actual GRPs available in the marketplace, tell a strong story about the true value of video ad inventory for our advertiser and advertising agency clients.

## **Summary: Cross Media Measurement Reveals Powerful Insights**

As the media landscape continues to fragment across platforms, measurement on a cross-platform basis is more than ever a necessary tool for media brands, as well as ad agencies, advertisers and researchers. comScore, in collaboration with the Coalition for Innovative Media Measurement (CIMM), developed a new measurement system to enable, for the first time, an in-depth look at cross-platform consumption across ten major media brands including broadcast TV and cable TV networks, as well as their digital media counterparts. The findings demonstrated:

- TV viewing is stronger than ever, but it is fragmented across devices and platforms.
- Digital platforms extend reach for media brands, whether its desktop or mobile, video, or web and video content.
- Radio combined with TV and Digital has a huge impact on engagement and the ability to add incremental audience.
- Multi-platform users are important to media brands – they are more engaged on TV than their TV-only counterparts - and more engaged with the digital content as well.
- Advertising agencies can maximize campaign delivery using multiple platforms.
- Comprehensive measurement across all platforms is important to effectively plan and monetize campaigns.

## Objectives and Measurement Principles

The ultimate goal of cross-platform measurement is to provide a comprehensive measure of audiences and advertising -- capturing audiences wherever and whenever they are engaging with content and advertising. The landscape is moving so quickly that as a measurement solution for one platform is developed, another two platforms seem to pop up with novel ways to engage consumers. This study was built with the objective of measuring consumption on five platforms and especially to tackle the challenge of measuring reach on an unduplicated basis:

1. Live TV and DVR Time-Shifted TV
2. Desktop
3. Smartphones
4. Tablet
5. Radio

Working with CIMM, comScore developed important principles of Cross Media Measurement. These detailed that the solution must provide:

- A Single, Unduplicated Audience Metric
- Unified Demography Across Platforms
- Holistic Accounting of All Video Viewing Behavior
- Scalable Measurement of Platforms & Audiences
- Flexibility to Fit the Future of Advertising

## Research Background & Methodology

comScore conducted early cross-platform research and development with the Coalition for Innovative Media Measurement (CIMM) in 2011 and 2012 by piloting an audience and advertising campaign measurement capability across TV, Internet and mobile, using a single-source consumer research panel. Single-source was defined as meaning that media usage on each platform is captured passively from the same consumers. In other words: no surveys or recall-based methods. The results of that study were reported at the 2012 CIMM Summit.

After the early CIMM pilot, CIMM members recommended an expansion. Under the leadership of ESPN, a CIMM member company, the research and development effort took the next step: measurement at scale. "Project Blueprint" was initiated, to measure TV, smartphone, tablet, desktop and radio consumption for ESPN brands. ESPN's goal was to take cross-platform measurement from special project to standard practice.

ESPN shared the results with the media community, demonstrating the importance of cross-platform measurement and quantifying the increase in reach and consumption for ESPN brands.

CIMM commissioned a further expansion to include measurement for 10 national media brands and advertising agency clients that are CIMM member companies. The Study results herein are Project Blueprint in action across the major media brands: A&E Networks, Disney ABC, CBS, ESPN, Fox, NBC Universal, Scripps, Turner Broadcasting, Univision, Viacom and Warner Brothers. In addition, cross-platform ad campaigns were measured for GroupM, Publicis and Starcom Mediavest Group. Expansion to these additional CIMM networks was critical, as different networks can have vastly different viewing profiles in terms of cross-platform consumption, time shifted viewing, demographics, and other viewing habits (time of day, co-viewing, etc...).

## Methodology

comScore's cross-platform methodology is designed to use a "**Hybrid**" approach, where the depth of consumer panels is combined with the scale of census-based measurements. comScore had established Unified Digital Measurement as a core methodology for its syndicated digital measurement services, where consumer panels are combined with the comScore census network web and online advertising traffic data. To provide new scale for linear television measurements, comScore used the same principles of a hybrid panel plus census measurement. comScore cross-platform measurement combines demography from a 70,000 person TV panel with a footprint of more than 5 million TV set top box (STB) homes, enabling television consumption behavior to be captured from the set top box attached to the TV set.

A hybrid approach to TV methodology has several advantages. First, using a STB data source enables comScore to expand the granularity of reporting, allowing more telecasts to be included in the measurements. Second, the integration of TV panel data enables persons-level demography to be established for household-level STB viewing data.

In addition to combining panels with census data, comScore's cross-platform methodology uses **Single Source** panels – where media consumption is captured from the same people and households. This is a key ingredient in order to base measurements of duplication and overlap on actual, observed behavioral data.

comScore has established several single source panels in order to directly observe duplication.

- Radio/TV: Where answers to the duplication between radio and TV are required, comScore uses a Nielsen Audio panel, with radio listening and television viewing captured from 70,000 panelists.
- TV/Digital: Where answers to duplication between TV and digital (desktop, mobile, tablet) are required, comScore has established a panel of 175,000 households from which return-path data is captured via TV set top boxes and from which digital consumption data is captured via comScore tags.
- Smartphone/Tablet/Desktop: Where answers to duplication between digital platforms (desktop, mobile, tablet) are required, comScore uses the single source data established for the comScore syndicated service, Media Metrix Multi-Platform™.
- TV/Radio/Smartphone/Tablet/Desktop: Where answers to duplication between radio and digital platforms are required, and where understanding about duplication across all five platforms is needed (TV, Radio, Desktop, Mobile, Tablet), comScore uses a panel of 2,500 consumers who are part of the Nielsen Audio panel to capture Radio and TV consumption. These panelists use a comScore meter (LinkMeter) to capture consumption for desktop, smartphone and tablet.

comScore's methodology for De-duplication applies directly-observed duplication across entities and platforms to the stand-alone and syndicated media measurements, such that the syndicated measurements are preserved and unduplicated reach can be reported.

## Notes about Study Results

comScore worked with each media brand to select a broadcast or cable network to be included in the Study. The media brand chose specific months for measurement and demographics for each broadcast or cable network in the Study. Because of that customization, the results summarized in this paper are from selected months in the fourth quarter of 2014 and the first quarter of 2015 and for the age/gender demographic group most relevant to the broadcast or cable network. The cross-platform campaigns occurred in 2014. The TV viewing data for each network was matched with the digital entity measured by comScore that was the closest match and/or the most relevant for the media brand, as determined by comScore and each individual media brand.

Digital consumption in this Study summary report is website visitation and digital video usage combined; however, website visitation and digital video was broken out separately in reports for each media brand. Digital consumption in this Study summary report is consumption from smartphones, tablets and desktops combined; however, consumption for each platform was broken out separately in the reports for each media brand.

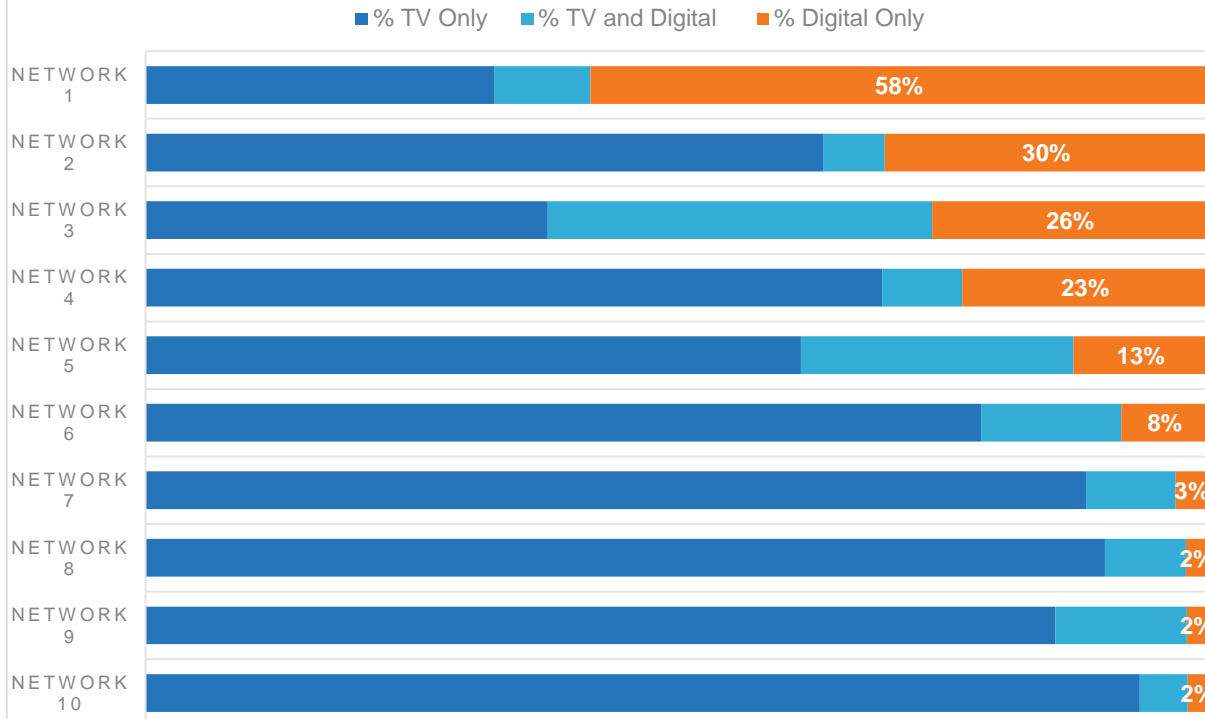
## Findings

### Each Media Brand has a Unique Value Proposition and Delivers Incremental Reach from Digital Content

Digital consumers increased the reach for all media brands, although the extent of the increase varies and depends upon the format of the content as well as the individual digital strategy of the media brand.

Across the 10 networks measured, the incremental reach attained by Digital Only consumers -- that is, consumers who used the media brand's content on digital platforms but did not use the media brand on TV -- ranged from a more than 100% increase in reach to below 2%. In the Figure below, networks 1 and 10 show the extremes for percent of reach coming exclusively from TV and digital. Network 1 has the highest share of reach coming from Digital platforms (desktop and/or smartphone and/or tablet) with 58% of total reach from Digital Only consumers. Network 2 reach is 26% Digital Only. The share of reach that was Digital Only was 3% or less for 4 of the networks in the Study.

## DIGITAL ONLY: % SHARE OF REACH BY PLATFORM BY NETWORK

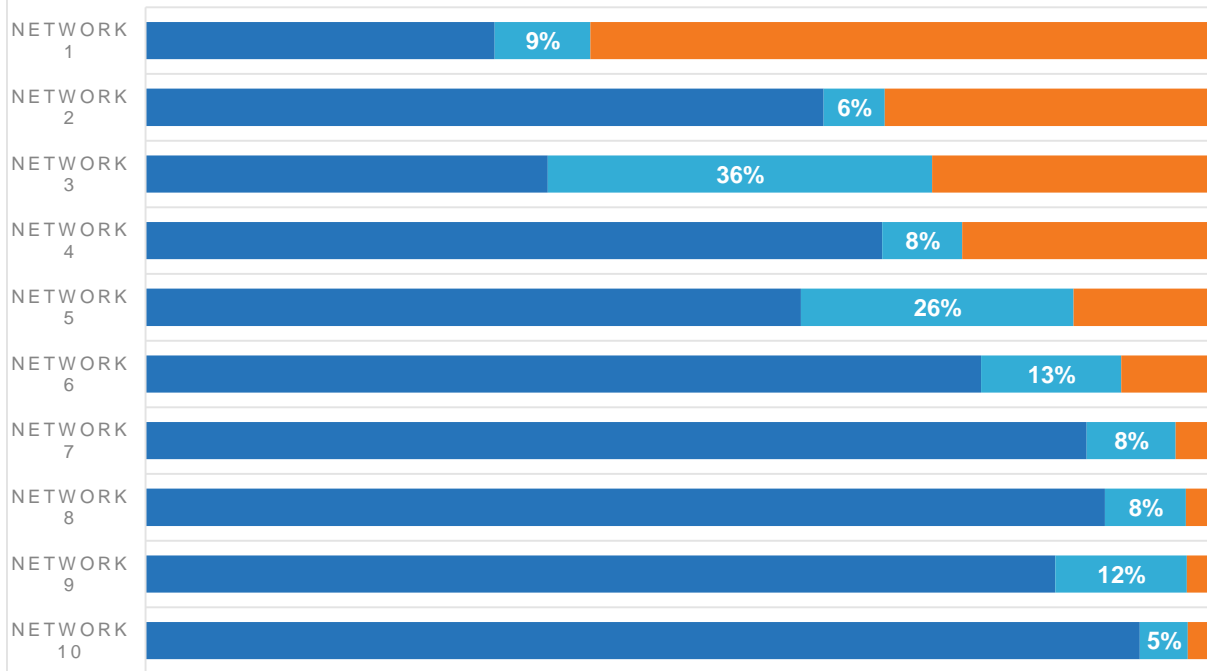


comScore CIMM Cross-Media Study, selected months in 2014 for key demographic

The percentage of consumers who use both TV and digital content for the media brands also showed considerable variation. The TV + Digital overlap is far larger for Network 3 and Network 5 than the other networks. 36% of Network 3's reach uses the brand's content on both digital and TV platforms. 26% of Network 5's reach uses the brand's content on both digital and TV platforms.

# TV AND DIGITAL: % SHARE OF REACH BY PLATFORM BY NETWORK

■ % TV Only   ■ % TV and Digital   ■ % Digital Only

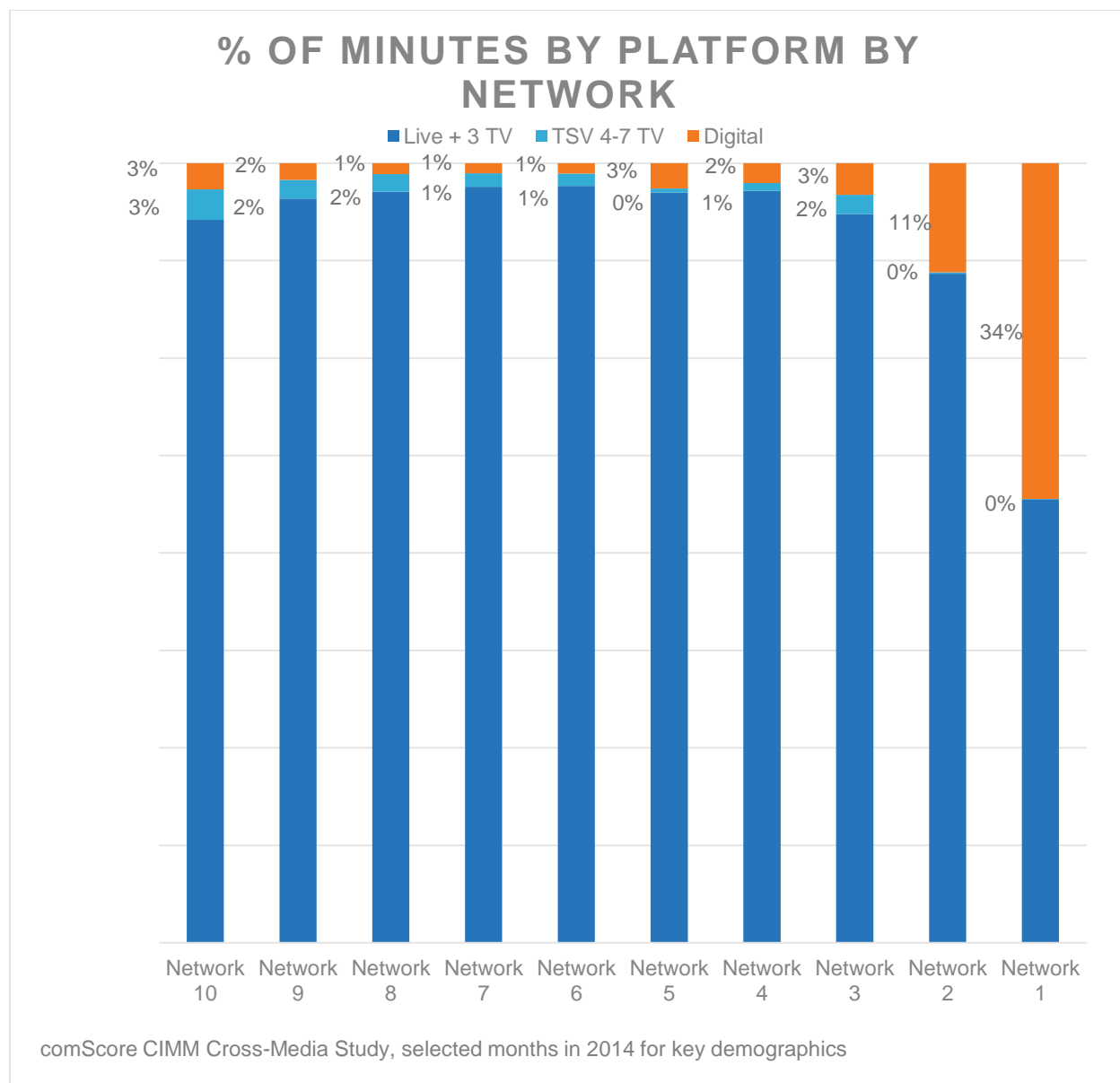


comScore CIMM Cross-Media Study, selected months in 2014 for key demographics



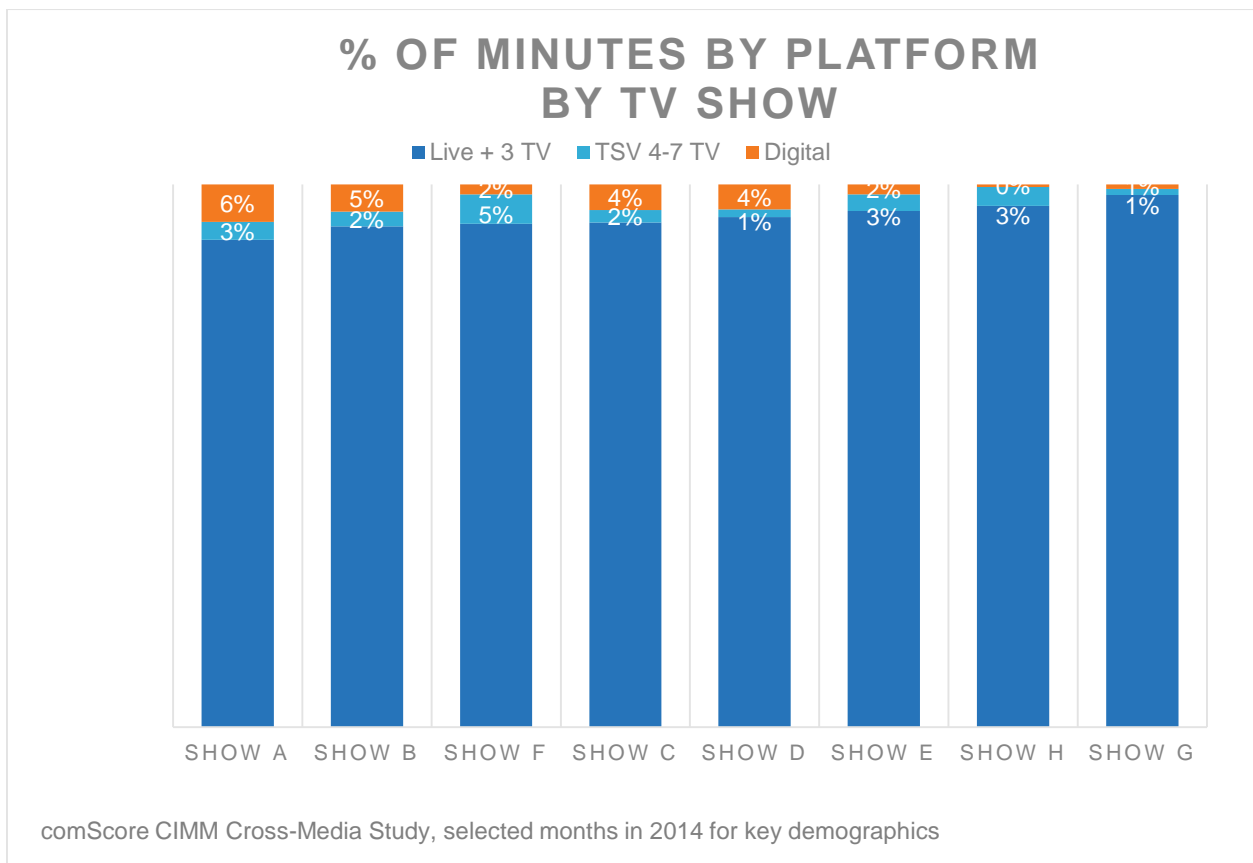
## Engagement from Time-Shifted Viewing and Digital Platforms Adds to the Audience

Expanding measurement beyond Live + 3 (live viewing plus three days of time-shifted viewing via DVR) increases the engagement realized for the networks in the Study. The increase in engagement varies across the different networks, with some being far heavier on Day 4-7 time-shifted viewing, some having far more minutes on Digital, and some still seeing nearly all minutes from Live+3 TV. The chart below highlights the contribution in minutes from digital consumption, with most networks achieving a 2-3% increase. Networks 1 and 2 showed the highest additional engagement from digital, at 11% and 34% respectively.



## Show-level Engagement Increases when Digital Consumption is Included

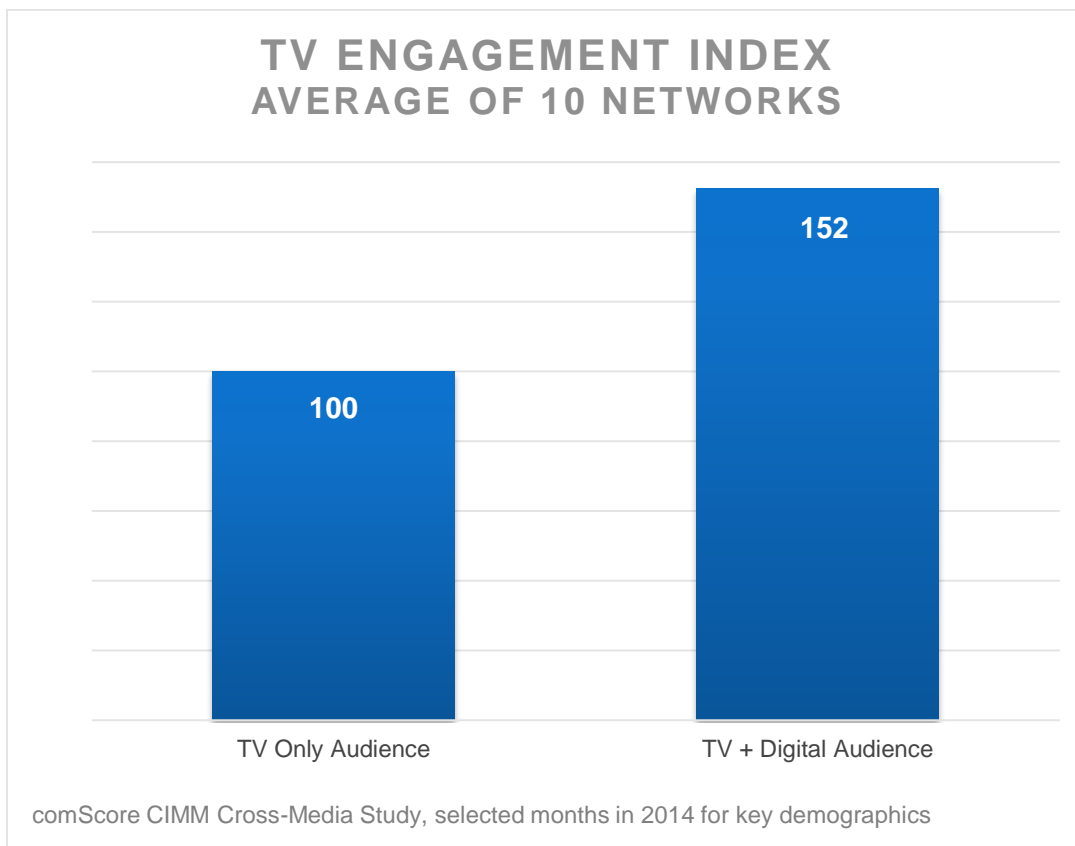
Where show-level data is available in comScore Media Metrix–Multi-Platform™, we are able to combine the show consumption on digital platform with the show's consumption on TV. The chart below illustrates minutes of consumption on TV (Live+3), on Day 4-7 time-shifted viewing via DVR and on Digital platforms for eight shows. At a show level, the vast majority of minutes are still consumed on Live + 3 TV basis, but incremental minutes from Day 4-7 time-shifted viewing and Digital constituted over 5% of total minutes for six of the eight shows illustrated in the chart below. At the high end, 6% of Show A's engagement comes from digital platforms and 3% comes from Day 4-7 time-shifted viewing. By contrast, Show G had 1% of minutes from digital and an additional 1% from Day 4-7 time-shifted viewing.



## The Super User Effect: Multi-Platform Consumers are More Engaged on TV

A clear trend that emerged from this Study was that of the multi-platform “Super User.” Viewers who watched the network on TV and visited the respective network online watched far more of that network on TV. The story of the engaged consumer held true for all 10 networks in the Study. Across the networks TV+Digital multi-platform consumers on average viewed 52% more of the network’s content on TV compared to TV Only consumers.

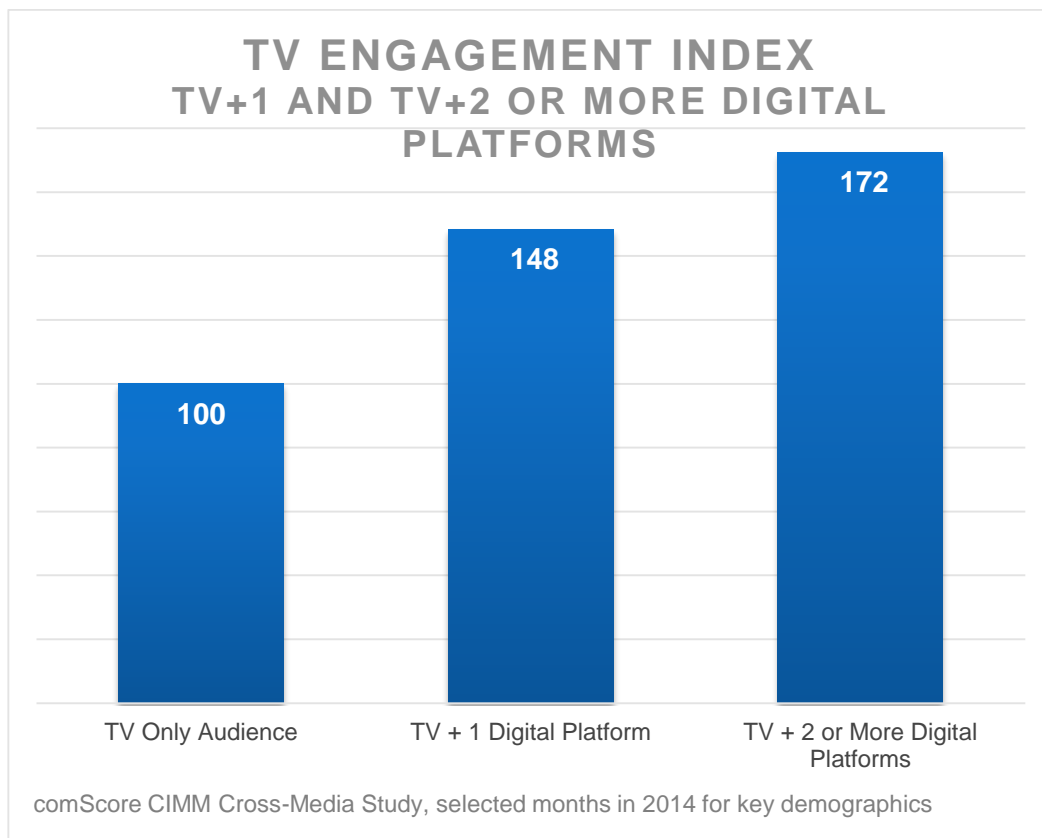
The chart below shows TV Engagement Index for TV Only consumers compared to TV+Digital multi-platform consumers. The TV Engagement Index is established by indexing average minutes per viewer of the TV Only consumer to 100 and then comparing it to average minutes per viewer of the TV+Digital multi-platform consumer. Multi-Platform consumers indexed at 152 compared to TV Only consumers. This means that if the average TV Only viewer to a network viewed that network 100 minutes on TV, then the average TV and Digital viewer of that same network viewed the network 152 minutes on TV. With cross media users consuming more TV than TV Only users, the story is clear that networks should strive to engage their viewers across all platforms to build those “super users.”



The “super user effect” is even more pronounced when breaking out the number of digital platforms used by the TV+Digital multi-platform consumer. The super user’s TV viewing is super-charged: the more digital platforms, the more TV viewing.

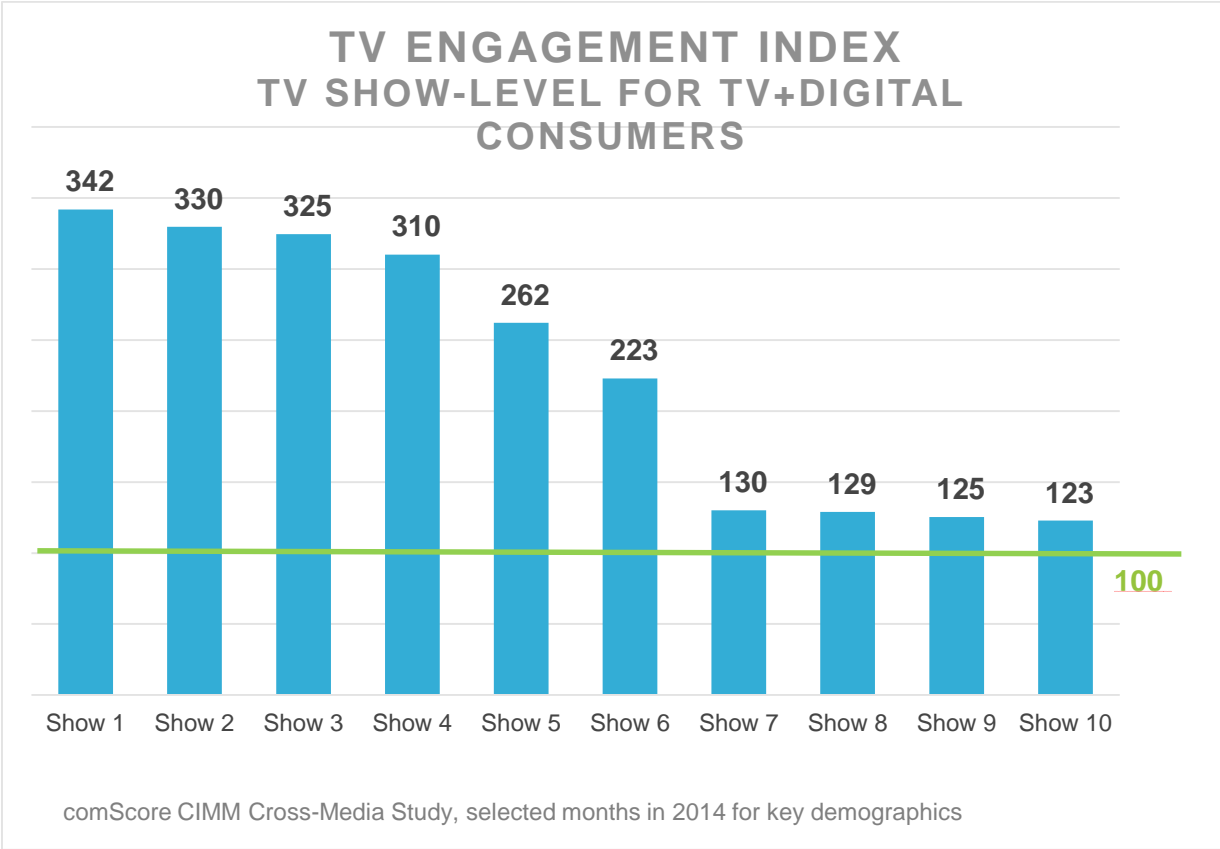
The following chart shows the TV Engagement Index for “TV + 1” consumers – those who engaged with the network on TV and on one but only one digital platform (i.e. desktop, smartphone, or tablet), “TV + 2 or More” consumers -- those who consumed the network’s content on two or more digital platforms (i.e, desktop and smartphone but no tablet, or desktop and tablet but no smartphone, or smartphone and tablet but no desktop, or desktop and smartphone and tablet).

TV Engagement Index for TV + 2 or more is consistently higher than TV + 1 for each of the 10 networks. On average, TV Engagement Index for TV + 2 or More consumers is 172. TV Engagement Index for TV +1 is 148. This means that if the average TV Only viewer to the network viewed the network 100 minutes on TV, then on average, the network TV viewer who also used the network’s content on one online platform viewed on TV for 148 minutes, and the network TV viewer who also used the network’s content online on two or more platforms viewed on TV for 172 minutes. That is more than two thirds more minutes on just the TV for the network coming from the users consuming network content on TV and two or more digital platforms.



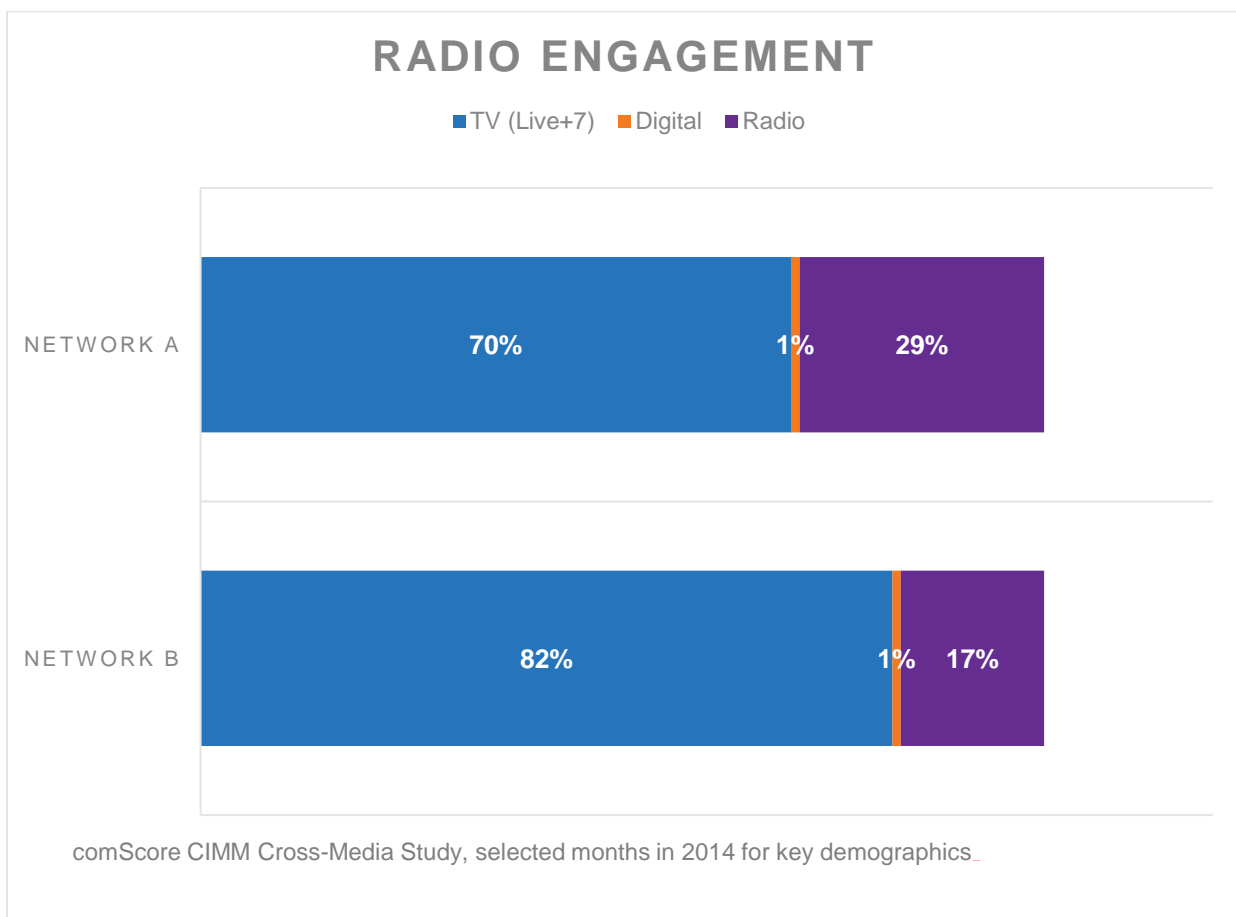
The Super User Effect is even more pronounced in the TV show-level results. Viewers of TV shows on the network who also engaged with the show or show-related content online spent considerably more time watching those shows on TV. The chart below shows TV viewing by TV Only consumers indexed to 100, then compares it to TV consumption for TV+Digital consumers. For three of the shows in the chart below, Digital+TV multi-platform consumers watched over 300% more of the show on TV compared to TV Only viewers.

When viewers of a TV show engage with the show’s content online, the TV Engagement Index illustrates that TV viewing of that show jumps. Super Users – those engaged in a cross media world across multiple screens -- demonstrate more viewing time on TV over and above the time they spend with the content on digital platforms.



## Radio Engagement: Radio Expands Audience when Combined with TV and Digital

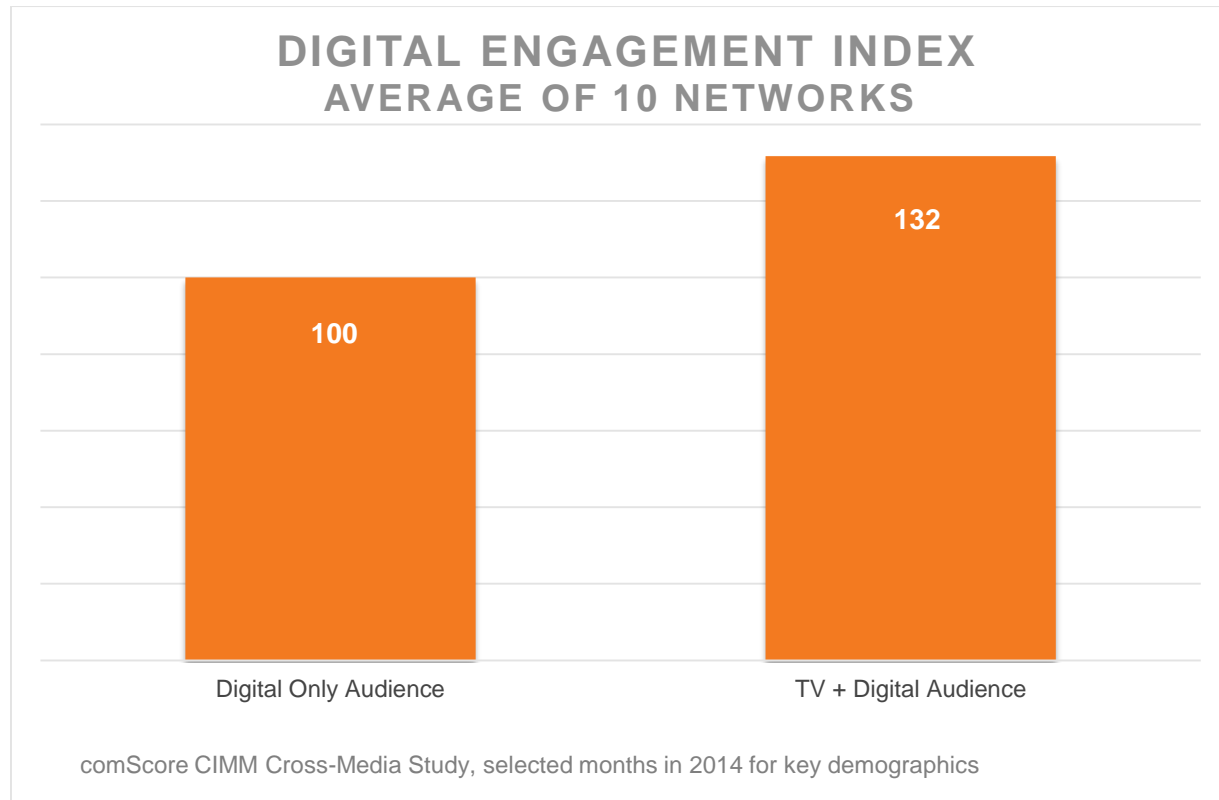
Radio is an essential part of many consumers' media day. The Study was able to explore the contribution of Radio when used in combination with TV and Digital platforms. Radio is an important means to audience extension when used in combination with TV and Digital platforms. The combination of Radio with other platforms had a significant impact on total consumption. Two of the media brands with radio assets are shown in the chart below. For the two of the media brands with radio assets in Study, Network A has nearly 30% of their minutes coming from radio listening and radio accounts for 17% of the minutes engaged with Network B.



## The Digital Super User: Multi-platform Consumers are Super Users of Digital

The Super User Effect applied to Digital consumption as well as TV. Consumers who watched the network on TV and visited the respective network online used far more of the network's website and online video content than consumers who only used the online content. The Digital Super User Effect held true for seven of the ten networks in the Study. Across the networks, TV+Digital multi-platform consumers on average spent 32% more time with the network's digital content than the network's Digital Only consumers.

The chart below shows the Digital Engagement Index for Digital Only consumers compared to TV+Digital multi-platform consumers. The Digital Engagement Index is established by indexing average minutes per user of the Digital Only consumer to 100 and then comparing it to average minutes per user of the TV+Digital multi-platform consumer. Multi-Platform consumers indexed at 132 compared to Digital Only consumers. This means that if the average Digital Only user of a networks' online website or online video used it for 100 minutes online, then the average TV+Digital user spent 132 minutes with the network's online website or online video. Like TV, cross media users consume more Digital content than Digital Only users, and it is clear that networks should strive to engage their viewers across all platforms to build those "super users."



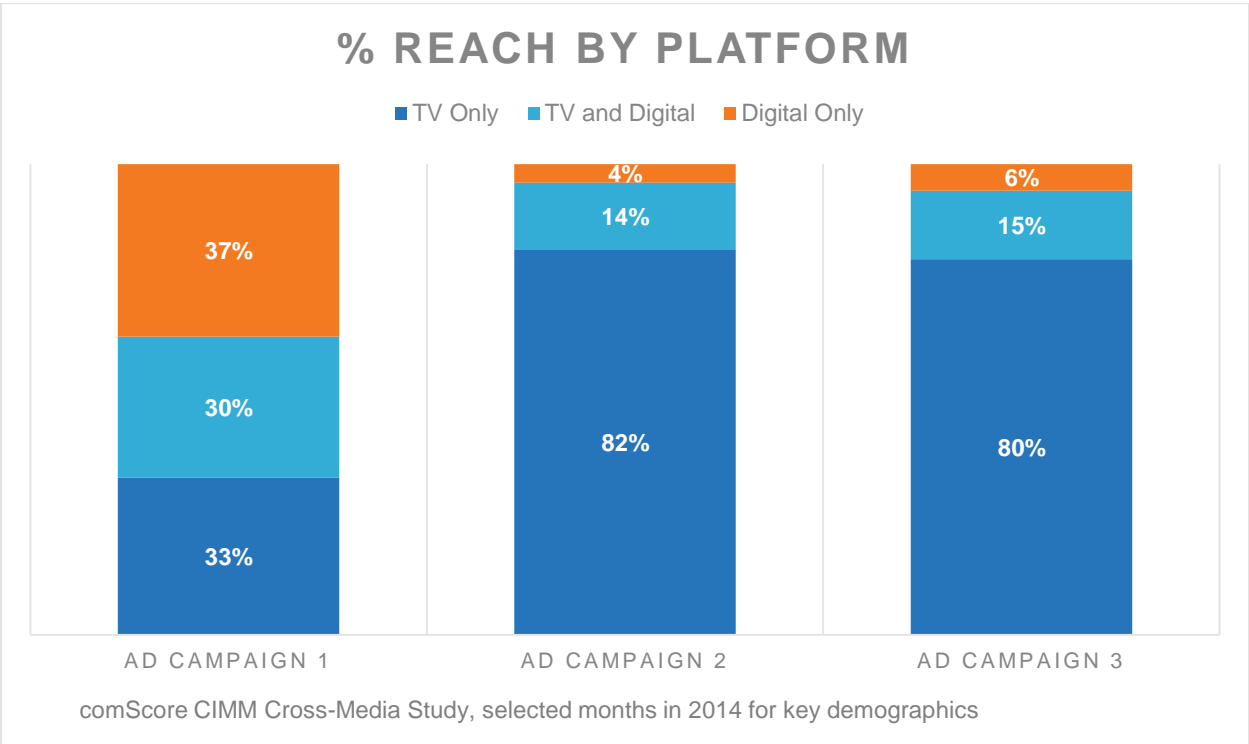
While the super user trend in terms of average TV minutes per person was universal across TV networks in the study, there was some variation as to whether the Digital Only or TV+Digital users consumed more minutes with a network online. Seven of the ten networks' online sites saw more minutes per person coming from multiplatform users than Digital Only users, but Digital Only users showed greater engagement online for three of the networks.

## Cross-Platform Advertising Campaign Performance

Measuring advertising campaign performance on a multi-platform basis is critical to understanding how to operate seamlessly in a "Total Video" world. Three advertising campaigns were measured on a multi-platform basis in the Study. The campaigns had very different media plans, with two of the ad campaigns being heavy on TV and one being heavy on Digital media. As expected, the campaigns showed different performance regarding how many consumers were reached exclusively on a single platform and how many were reached on multiple platforms.

Ad Campaign 1 achieved an almost even split between consumers reached exclusively on Digital platforms, consumers reached on both TV and Digital platforms, and consumers reached exclusively on TV. For Campaign 1, 37% were reached exclusively on digital platforms (Digital Only), 30% were reached on TV and Digital platforms and 33% were reached exclusively on TV (TV Only). Ad Campaign 2 and 3 showed similar delivery performance, with on average 80% reach on TV Only, 15% on TV and Digital platforms and 5% reached on a Digital Only basis.





**Conclusion**

Just as consumers engage with content across multiple platforms to get the most enjoyment out of their viewing experience, the industry must holistically measure those consumers across platforms in order to optimize measurement, understanding, and ultimately monetization of the actual consumption patterns of users. To rely on “silo’d” measurement is to increase the risk of missing the true extent of a publisher’s audience – the reach and minutes over all of the platforms they use to distribute their content. It also increased the risk that the true extent of an advertiser’s audience – the reach and impressions of their campaign across all platforms and devices – might be missed as well. Additionally, silo’d measurement will also fail to make the distinction between light users who confine themselves to only a single platform and the super users who engage on multiple platforms. Because multiplatform users are often the heaviest users of the media brand, the ultimate goal should be to engage with an audience across media types with synergistic content that encourages the creation of these super users.

Through the efforts of CIMM, ESPN and comScore, the walls that separated content by platform have been coming down. Today, the entire video ecosystem can be measured in one system, and it is clear that when those walls come down, everyone wins; consumers get more of the content they crave and the industry keeps users interested and coming back for more.

## Contact

For more information about this Study, please contact Jane Clarke, CEO and Managing Director, CIMM, at [jane.clarke@cimm-us.org](mailto:jane.clarke@cimm-us.org) or Joan FitzGerald, Senior Vice President Television and Cross-Media Services, comScore Inc. at [jfitzgerald@comscore.com](mailto:jfitzgerald@comscore.com)

## Glossary of Terms

There are many acronyms and terms used in the media research industry, and many used in this paper. Some definitions used in this paper may differ from other understandings of the acronym or term, so the Glossary is provided which may be helpful to the reader.

**CIMM.** Coalition for Innovative Media Measurement is an organization founded in 2009 by leading television content providers, media agencies and advertisers to promote innovation in audience measurement for television and cross-platform media. CIMM commissioned this Study.

**Day 4-7 time-shifted viewing.** Playback of video recorded via a DVR that occurs 4 to 7 days after the initial airing of the video on TV.

**Digital.** In this paper, “Digital” refers to consumption on smartphones, tablets and desktop computers.

**Digital Only.** In this paper, “Digital Only” refers to consumers who used the content on one or more Digital device but had no consumption on a TV set.

**DVR.** In this paper, time-shifted viewing includes video consumed via recording and playback from Digital Video Recorders.

**Live+3.** Video consumption via the television set that includes consumption of the airing of the programming on TV (“Live”) and playback of the programming recorded via a DVR that occurs up to 3 days after the airing on TV.

**Mobile.** In this paper, “Mobile” refers to consumption on smartphones and tablets.

**MVPD.** Multichannel Video Programming Distributor is a service provider that delivers video programming services usually for a subscription fee (pay television). In the U.S., MVPDs include cable operators, satellite operators and telco companies.

**OTT.** In this paper, OTT refers to “Over the Top” services that enable consumers to receive video programming without an MVPD subscription.

**STB.** Set Top Box is the MVPD-provided device that delivers video programming. Increasingly STBs have a return-path capability where a consumer’s interaction with the STB generates a datastream that is captured by the MVPD. STB data is a TV viewing datasource in comScore methodology.

**TV Only.** In this paper, “TV Only” refers to consumers who used the content on a TV set but had no consumption on any Digital devices

**TV+Digital.** In this paper, “TV+Digital” refers to consumers who used the content on both a TV set and on at least one Digital device.

TV+1. In this paper, TV+1 refers to consumers who viewed the content on TV and also used the content on one and only one digital device.

TV+2 or More. In this paper, TV+2 refers to consumers who viewed the content on TV and also used the content on at least 2 digital devices.

VOD. In this paper, VOD refers to Video On Demand that is provided by the MVPD.

SVOD. In this paper, SVOD refers to Subscription Video On Demand that is delivered over the Internet and provided by a non-MVPD, such as Netflix, Amazon Prime and others.