How Multi-Screen Consumers Are Changing Media Dynamics

Findings from a comScore Study for the Coalition for Innovative Media Measurement

Joan Fitzgerald
VP, TV & Cross-Media Solutions
comScore, Inc.

Jane Clarke
Managing Director
CIMM
What is CIMM?

CIMM is a coalition of buyers and sellers of media working to innovate and test new methods for the industry to:

1. Improve TV Audience Measurement Through Use of Return-Path Data
2. Solve the Cross-Platform Measurement Challenges
Cross-Platform Measurement

Plan ➔ Verify Exposure ➔ Evaluate Effectiveness & ROI
comScore Cross-Platform Measurement

Set Top Box Data
TV viewing and exposure

Census Tags
web usage, exposure

Mobile Handset
mobile web usage, exposure

Online Panel
demos, search, site visitation

Cross-platform Media Measurement and Campaign Delivery
Understand reach and usage lifts going from one screen to multiple screens, and maximize campaign effectiveness
Study Findings
Major Media Brands Are Extending Their Content to Digital Platforms – and Consumers Are Taking Advantage of the Opportunity

% Reach During 5-Week Study Period
Average Across 10 Broadcast and Cable Networks/Network Groups

- % Reached TV: 90%
- % Reached Online: 25%
- % Reached Online Video: 12%
A Significant Multi-Screen and Digital Only Audience is Emerging for Major Media Brands

% Reach During 5-Week Study Period
Average Across 10 Broadcast and Cable Networks/Network Groups

- TV-Only: 72%
- Multi-Screen: 17%
- Digital-Only: 11%

ADVERTISING RESEARCH FOUNDATION

AUDIENCE MEASUREMENT 7.0
The size of the multi-screen audience shows wide variation across media brands.

### Multi-Screen by Network/Network Group

- % who use Network/Network Group's content on multiple screens:
  - Network 1: 3%
  - Network 2: 3%
  - Network 3: 8%
  - Network 4: 12%
  - Network 5: 15%
  - Network 6: 17%
  - Network 7: 21%
  - Network 8: 30%
  - Network 9: 30%
  - Network 10: 31%
Online Video is Key Driver to Viewer Engagement, Particularly on TV

Index of Minutes Spent Using TV
Average Across 10 Broadcast and Cable Networks/Network Groups

TV Viewers

TV and Online Video Viewers

100

125
Consumers Using TV and Online Video Spent the Most Time With the Media Brand on TV

Index of Minutes Spent with TV by Network/Network Group
Consumers Using TV and Online Video Compared to Consumers Using TV
Multi-Screen Consumers are Building “Media Minutes” Into Their Experience with the Media Brands

Case Study: How Minutes Build by Platform for Major Network/Network Group

- TV Consumers
- Multi-Screen Consumers
- TV and Online Video Consumers

- Mobile Minutes
- Online Video Minutes
- Web Minutes
- TV Minutes
Digital Platforms Create New “Dayparts” of Usage and Viewing – Which Means New Opportunities for Media Brands

Share of U.S. Device Page Traffic for the Newspaper Category Over a Day (Weekday)

Source: comScore Custom Analytics, January 24, 2012 (Tuesday), U.S.
Multi-Screen Consumers Are More Likely to be Key Demographic Target for the Media Brands

High Propensity Indices for Network/Network Groups by Age

Persons 12-34
- Multi-Screen: 159
- TV and Online Video: 107
- Digital Only: 134

Adults 50+
- Multi-Screen: 179
- TV and Online Video: 119
- Digital Only: 134

- Multi-Screen: 120
- TV and Online Video: 120
- Digital Only: 120

- Multi-Screen: 111
- TV and Online Video: 111
- Digital Only: 111

- Multi-Screen: 151
- TV and Online Video: 128
- Digital Only: 128

- Multi-Screen: 142
- TV and Online Video: 123
- Digital Only: 123

- Multi-Screen: 151
- TV and Online Video: 132
- Digital Only: 132

- Multi-Screen: 142
- TV and Online Video: 114
- Digital Only: 114

- Multi-Screen: 159
- TV and Online Video: 117
- Digital Only: 117

- Multi-Screen: 142
- TV and Online Video: 128
- Digital Only: 128
Social Media Presents New Opportunities for Media Brands to Engage With Consumers

% Reach - Average Across 10 Networks/Network Groups

- Used Facebook Concurrently with TV: 29%
- Used Internet Concurrently with TV: 61%
Scaling Multi-Screen Measurement: Hybrid Approach

- TV
- Computer
- Mobile