

Cross-Media Brands:

Connecting with Consumers Across Media Platforms

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CI SUMMARY: Sports fans can access ESPN in a variety of ways: TV, Internet, mobile, radio and print. Although currency data exist for the different media, ESPN needed to understand how fans navigate from platform to platform. The best way to rich, comprehensive insights about sports fans was to take an approach that combined two methods—single source hot-house and fused media databases. Turns out that two sources really are better than one.

ESPN's mission statement "to serve sports fans wherever sports are watched, listened to, discussed, debated, read about or played," needed to be quantified with research that delivered equally powerful insights to serve advertisers' need for reliable metrics. As one of the true cross-media brands, fans dial into ESPN any number of ways—via TV, the Internet, mobile devices, radio and print.

ESPN: a cross media brand



While data existed for each individual medium, exactly how ESPN fans navigated across platforms remained a mystery. In order for advertisers to fully understand the value of their investment, both in terms of singular platforms and cross-media exposures, a new lens was needed for looking across media.

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Modeling (im)perfect

Whether you sit on the fusion or single-source side of the research model debate, both represent research methodologies, which means that they are subject to the inherent problems of data bias or error. Areas of vulnerability include sampling error, response bias, measurement issues and modeling inaccuracies in imputation, forecasting, weighting or integration.

Even so-called "pure" single-source data bases are anything but. In point of fact, they may contain more error and bias than fused data due to lower cooperation rates and less precise measurement techniques (e.g., self-reported vs. metered behavior). By using all available information, a reliable picture of behavior can be pieced together. In the case of ESPN, that meant integrating or fusing singular databases together and using the single source Nielsen Convergence Panel to validate the data fusion work, while also delivering insights not available via fusion.

A tale of two methods

Data fusion involves a process whereby media usage across a variety of platforms is integrated together. The Nielsen TV/Internet data fusion combines data from the National People Meter database of TV viewing households with the

Media usage across a variety of platforms is

Nielsen Online NetView Panel of Internet surfing households to deliver a measure of time spent and reach to sports programs and websites (including home and work use) by demographic. (See *Sidebar, Nielsen TV/Internet Fusion Data Base.*)

integrated together...

The Nielsen Convergence Panel is a non-currency panel of homes where both in-home TV viewing and in-home Internet usage are measured giving a direct measurement of the interaction between these media and providing a comparison and validation point for the TV/Internet data fusion. (See *Sidebar, Nielsen Convergence Panel.*)

Outcomes in

Initial results from the validation exercise that compared like-for-like results between the data fusion and Conversion Panel data are heartening. They indicate that the percent of people watching TV and using the Internet for shared and exclusive users are very close between the two research approaches. With results within a few percentage points of each other, the exercise proved that the fusion approach provides a reliable look across platforms for cross-media brands.

The fusion approach provides a reliable look across platforms for cross-media brands...

Topline findings suggest that about 75% of people have Internet access and virtually all households have TVs (98%). Those without Internet access tend to be older, lower income and heavier TV viewers. The heaviest Internet users also tend to be slightly heavier TV viewers. Conversely, light Internet users also tend to be light TV viewers. Although these findings may seem counterintuitive, they surfaced in both the fusion and Convergence Panel data.

Watching the watchers

Initial fusion findings for ESPN and ESPN.com show that over half of Persons 2+ tune to ESPN or use ESPN.com and 5% of ESPN's combined TV-Internet audience use ESPN.com exclusively in a month. In March 2008, 123 million people accessed ESPN on TV and another 21 million clicked in through ESPN.com. Among households with either TV or Internet access, 84% opted for TV viewing, 10% used both media and 6% used ESPN.com exclusively.

Initial Fusion Findings for ESPN and ESPN.com Use—Average Month

P2+ in TV HHs	286,036,000	100%
Watched ESPN	122,713,000	43%
Used ESPN.com	20,543,000	7%
Either ESPN-ESPN.com	130,603,000	46%
P2+ Using TV or Internet	130,603,000	100%
Watched ESPN Only	110,060,000	84%
Used ESPN.com Only	7,890,000	6%
Did Both	12,652,000	10%
Did Neither	155,433,000	54%

Source: NielsenConnections (March 2008)

The more, the better

There is no mixed message from mixed media viewers. ESPN enthusiasts like their sports, and the more they watch, the more ways they watch. Sports fans who watch ESPN and use ESPN.com were heavier ESPN media users, spending 27% more time watching ESPN TV than TV-only users and 50% more time using ESPN.com than the Internet-only viewers.

The more they watch, the more ways they watch...

The "more the better" philosophy holds for the so-called three screen audience as well—those who view using television, Internet and mobile devices. Nielsen found that from May 2007 to May 2008, watching TV in the home was up 1.4%, Internet use was up 5%, while watching time-shifted TV delivered through systems like Tivo jumped 35.7%.

Overall Usage Number of Users 2+, Per Month (in 000s)

	May '08	May '07	% Diff
Watched TV in the home*	282,348	278,400	1.4%
Watching Timeshifted TV*	63,265	46,632	35.7%
Using the Internet**	161,690	154,134	5%
Watching Video on Internet**	118,673	n/a	n/a
Using a Mobile Phone^	217,076	n/a	n/a
Mobile Video Subscribers Watching			
Video on a Mobile Phone^	4,400	n/a	n/a

Source: Nielsen Three Screen Report, May 2008

* TV includes live viewing plus any playback viewing; Timeshifted TV is playback primarily on a DVR, but including playback on services like Start Over as well as playback from a DVD recorder.

** Internet figures are from home and work. Hours:minutes are based on the universe of persons who watch online video.

^ Survey results reported in April 2008, this is a Q1 2008 estimate of only those mobile subscribers that subscribe to and use video on their mobile phone, over the past 30 days.

In terms of hours, watching TV in the home for the May-to-May time period was up by 5 hours and 27 minutes; time-shifted TV increased by 2 hours and 6 minutes; and Internet use inched up equivalently, by 2 hours and 10 minutes.

Time Spent in Hours:Minutes Per User 2+, Per Month

	May '08	May '07	% Diff
Watched TV in the home*	127:15	121:48	4%
Watching Timeshifted TV*	5:50	3:44	5.6%
Using the Internet**	26:26	24:16	9%
Watching Video on Internet**	2:19	n/a	n/a
Mobile Video Subscribers Watching			
Video on a Mobile Phone^	3:15	n/a	n/a

Source: Nielsen Three Screen Report, May 2008

* TV includes live viewing plus any playback viewing; Timeshifted TV is playback primarily on a DVR, but including playback on services like Start Over as well as playback from a DVD recorder.

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^ Survey results reported in April 2008, this is a Q1 2008 estimate of only those mobile subscribers that subscribe to and use video on their mobile phone, over the past 30 days.

For those who phoned it in, mobile video subscribers age 12–17 watched 5 hours and 25 minutes of video per month. Those aged 18–24 accounted for 3 hours and 2 minutes of mobile video viewing. The 25–34 segment logged 3 hours and 36 minutes of mobile video time. The 35–44 and 45–54 age cohorts each accounted for 2 hours and 53 minutes of screen time. Consumers 55–64 keyed in for 2 hours and 10 minutes of mobile video watching. A slight gender skew surfaced, with women accounting for the majority of TV and Internet video viewing, while 54% of the mobile device audience was male.

Anyway they look at it, via TV, Internet, video or phone, viewers love their sports and want ready access wherever and whenever they desire.