Arbitron's Single Source, Three-Screen Measurement Approach for CIMM

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Project Objectives and Scope

The objectives of the project were threefold:

- Determine the feasibility of building a scalable, single source, three-screen (TV, PC and Mobile) panel
- Measure three-screen media usage for selected programs and advertising campaigns
- Gain new insights on three-screen users and usage

Scope and timing:

- 500-person, single source panel of 3-screen users drawn from reactivated Arbitron PPM currency panel members
- Three month measurement period: November 2011 – January 2012

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Single Source Implementation

PPM for Broadcast and Cable TV
Online Video
Commercials

Mobile device meter Tracks Internet use by browsers or apps – Android & Blackberry Phones

One Panelist Three Screens

PC Meter Tracks Internet URLs

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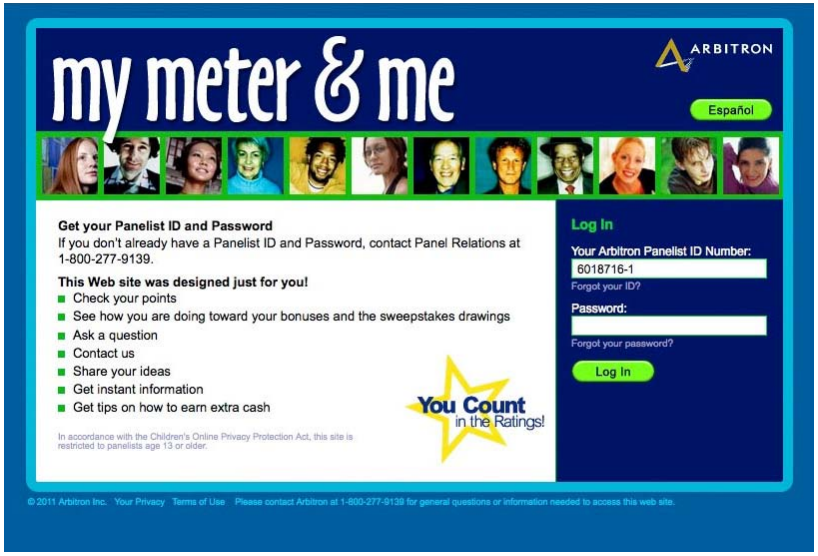
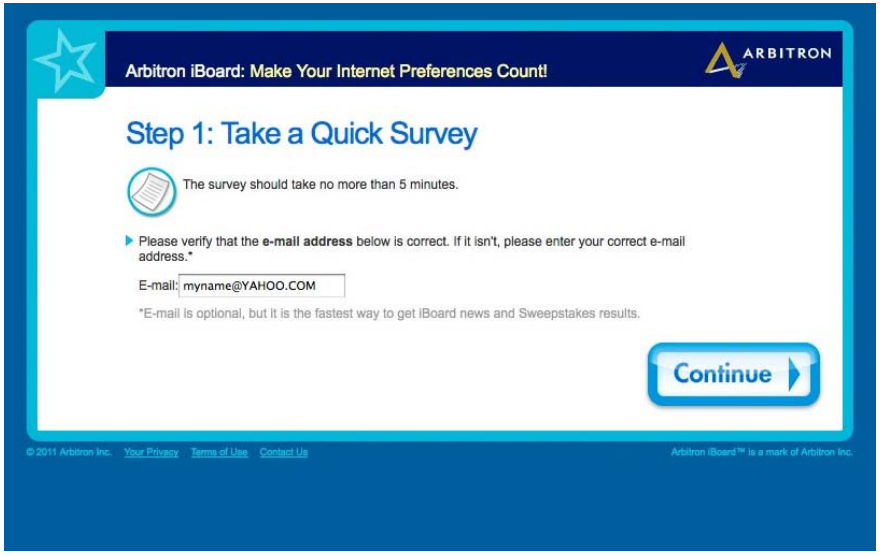
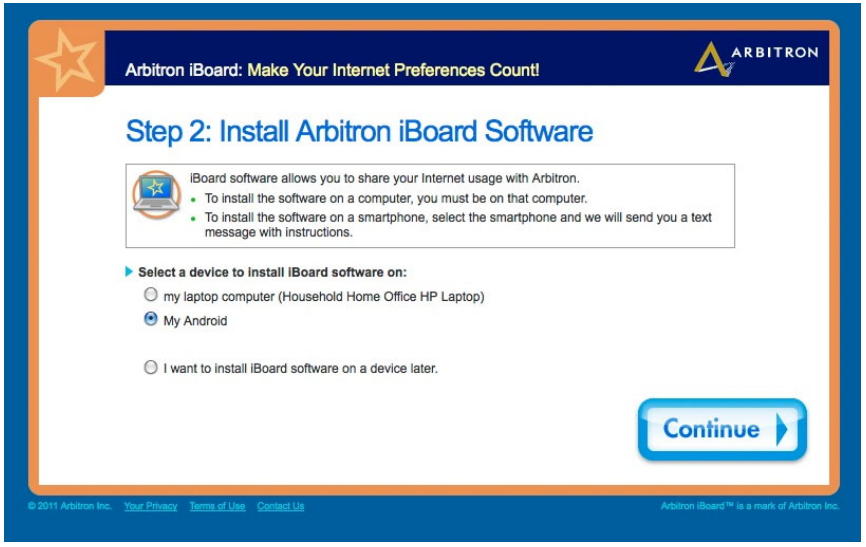
Panelist Materials







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Three-Screen Intab Panel Composition

Percent of Panelists by Demographic (Nov 2011)

Age Group

18-24	12.5
25-34	20.4
35-44	22.8
45-54	21.3
55-64	18.9
65+	4.2

Race/Ethnicity

Black	12.7
Hispanic	12.3
Other	75.0

Language Preference

Hispanic English Dominant	9.4
Hispanic Spanish Dominant	2.9
Non-Hispanic	87.7

Gender

Female	49.6
Male	50.4

Installed Phone Type

Android	77.4
Blackberry	20.4
Blackberry and Android	2.2

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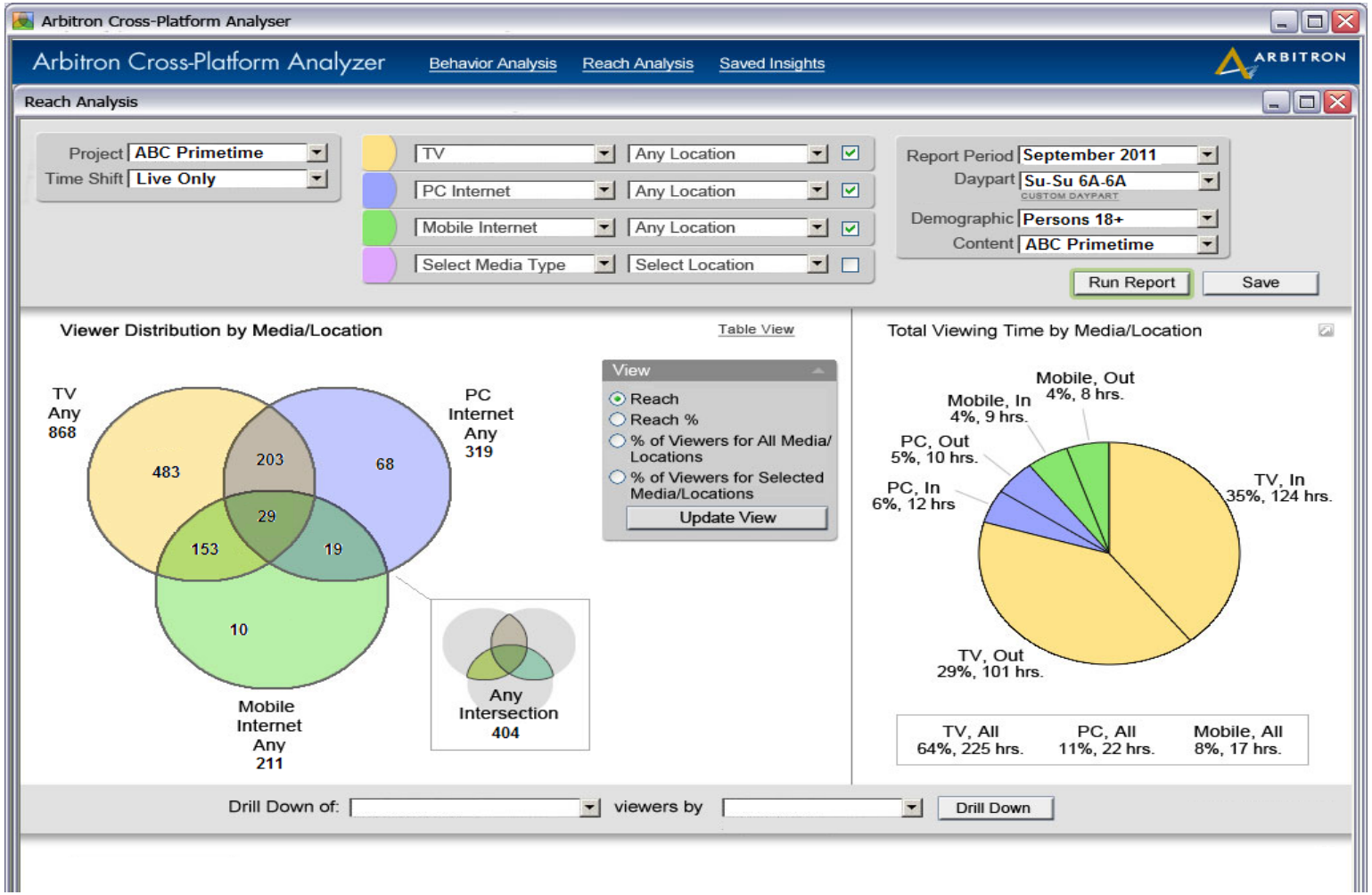
Reach Analysis Sample *(demonstration data)*



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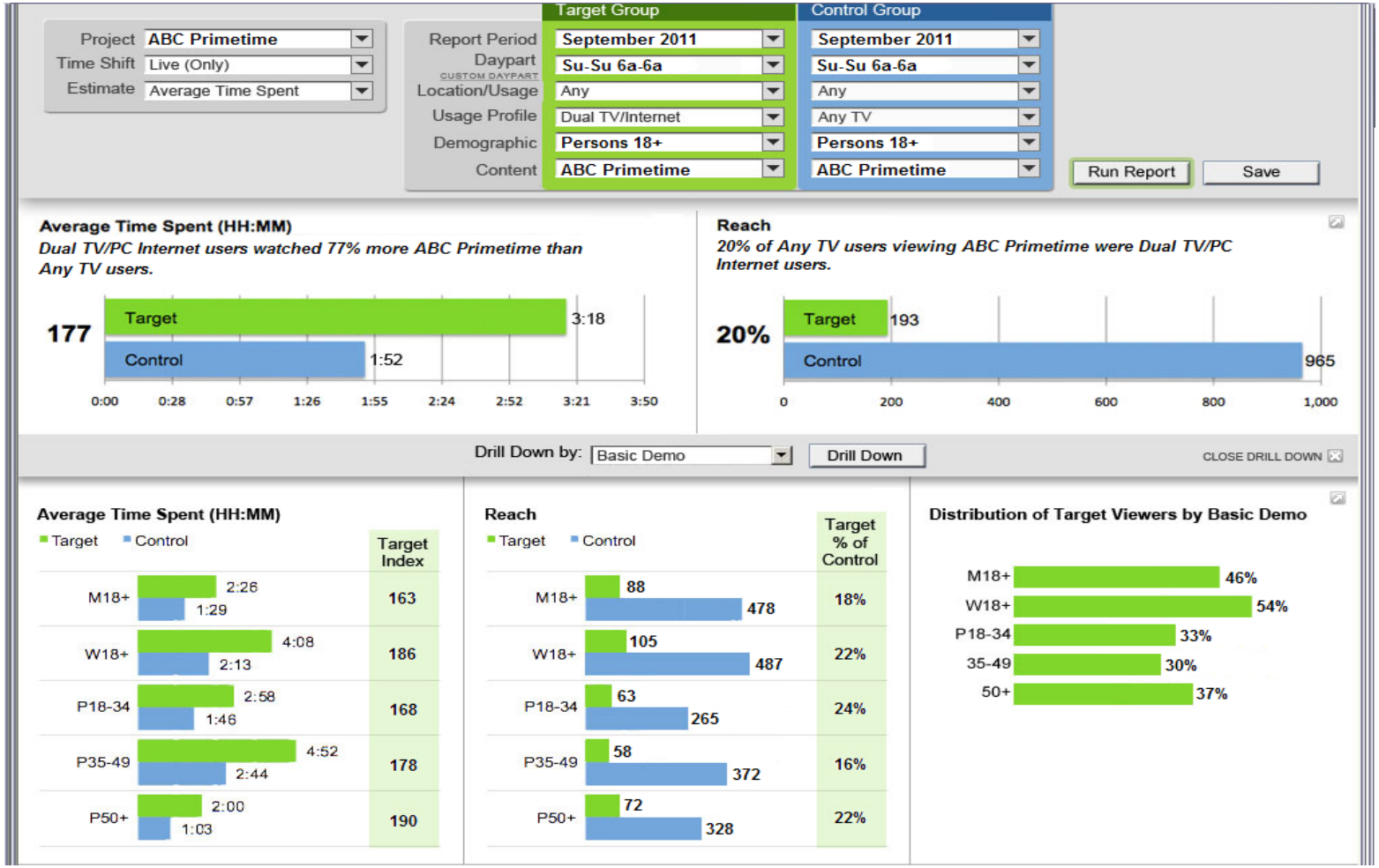
Behavior Analysis Sample *(demonstration data)*



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High Level Insights

- Arbitron conducted 25 different projects for CIMM
- Insight data which follows is from Nov 2011
- From 2 aggregate level CIMM projects looking at exposure to participating CIMM members'* TV content, select websites or mobile apps plus online video or social media sites

  - Project 1 includes major online video sites (Hulu, Netflix, VUDU, YouTube) or associated mobile apps
  - Project 2 includes major Social Media, Search or Mail sites (Facebook, Twitter, LinkedIn, GetGlue, Myspace.com, Foursquare, Google, Yahoo, Bing, Gmail, Yahoo Mail, Hotmail, AOL e-mail) or associated mobile apps

**The following networks participated: ABC, CNN, A&E, Bio Channel, Crime & Investigation, History Channel, Lifetime, CBS, Discovery Channel, Animal Planet, ID, TLC, ESPN, ESPN2, ESPN Classic, ESPN Deportes, ESPN News, FOX, FOX News, FX, FuelTV, National Geographic, Speed Channel, NBC, Various Viacom properties*

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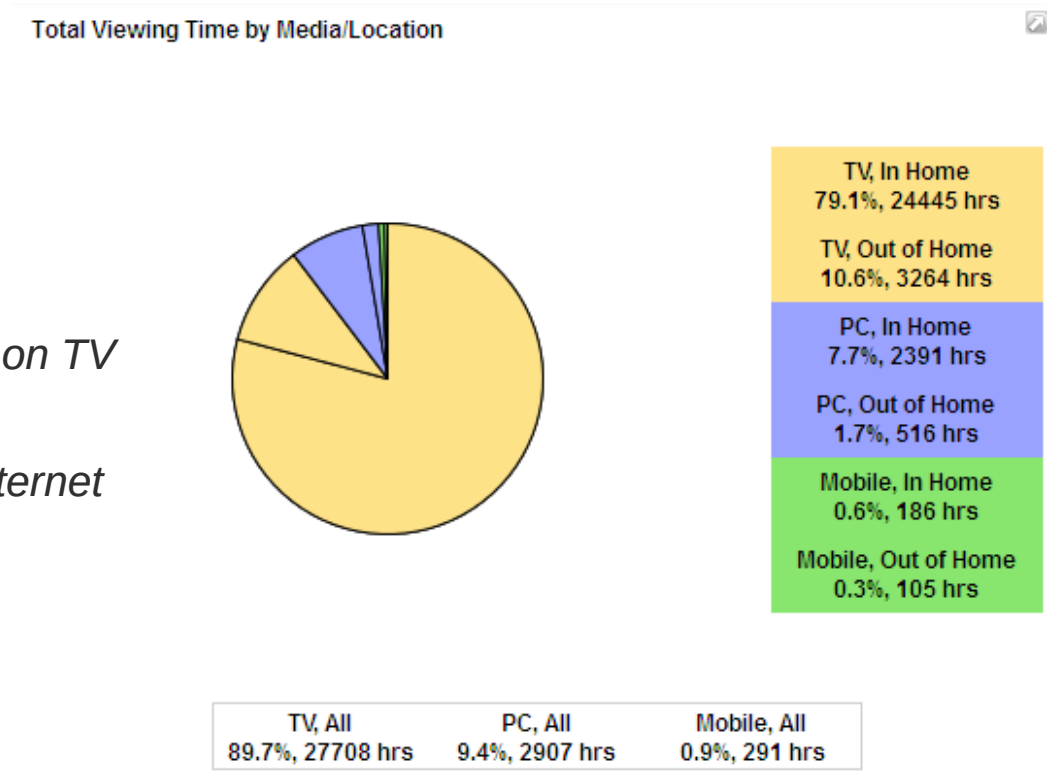
High Level Insights

» Cross-Platform Usage

- TV captured the most time spent with media
  - *90% of time spent with media was on TV*
  - *9% spent on PC Internet*
  - *1% of time spent was on Mobile Internet*



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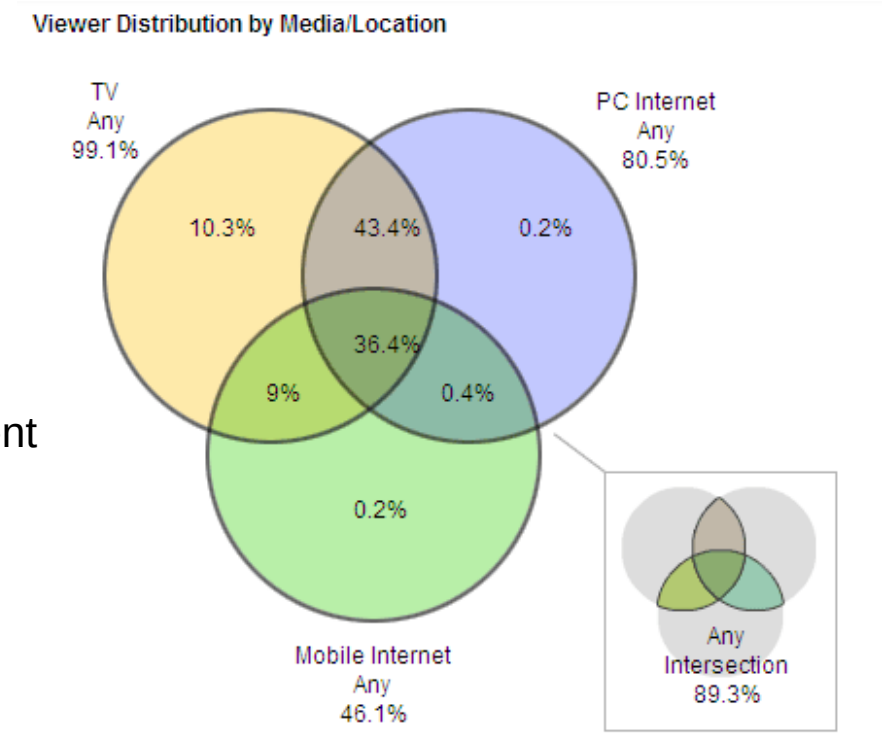
High Level Insights

» Cross-Platform Users

- The majority of panelists (89%) were cross-platform users (used at least 2 screens)
- One-third of the panel (36%) used all 3-screens (3 screen users) to access content which was included in the CIMM project



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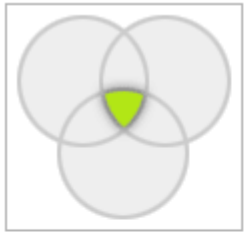
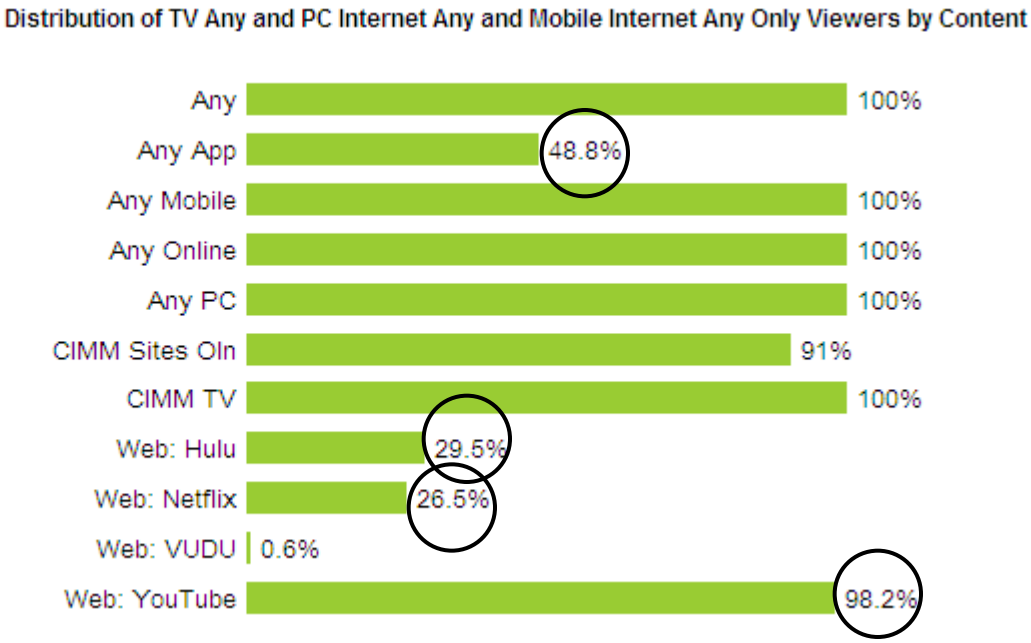
High Level Insights





» 3-screen Usage

- The majority of users who viewed content on all 3 screens (3-screen users) fell into the A35-49 age group and skewed more Male than TV-only users
- Nearly all 3-screen users (98%) viewed YouTube; 27% viewed Netflix; 30% viewed Hulu
- Almost half (49%) of 3-screen users used at least 1 of the Mobile Apps included in the CIMM project

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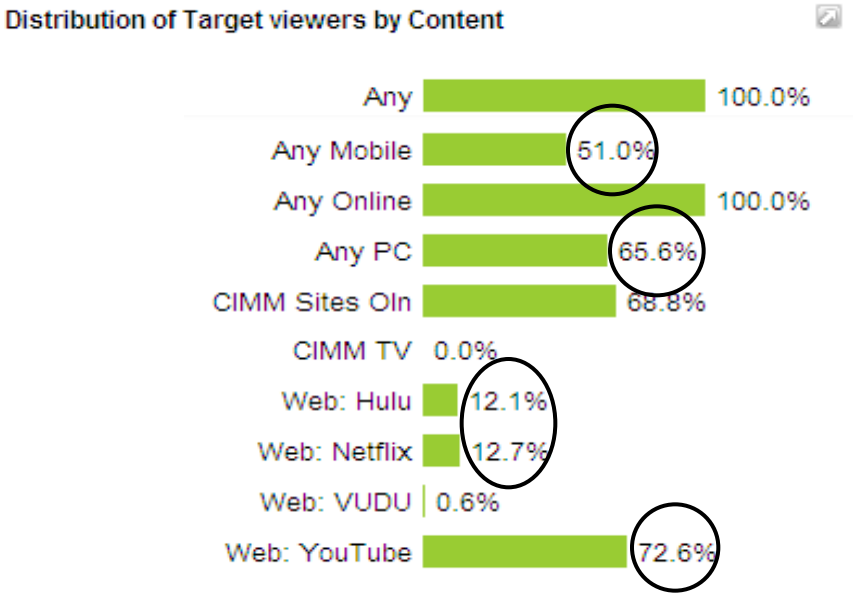
High Level Insights

» "At-work" Usage = Registered PC as work or dual-use and location is OOH

- 34% of users access "CIMM member companies' content while "at-work"
  - *66% used PC Internet content at-work*
  - *51% used Mobile Internet content at-work*
  - *73% of at-work users viewed YouTube*
  - *13% of at-work users viewed Netflix*
  - *12% viewed Hulu, spending an average of 42 minutes on the site*



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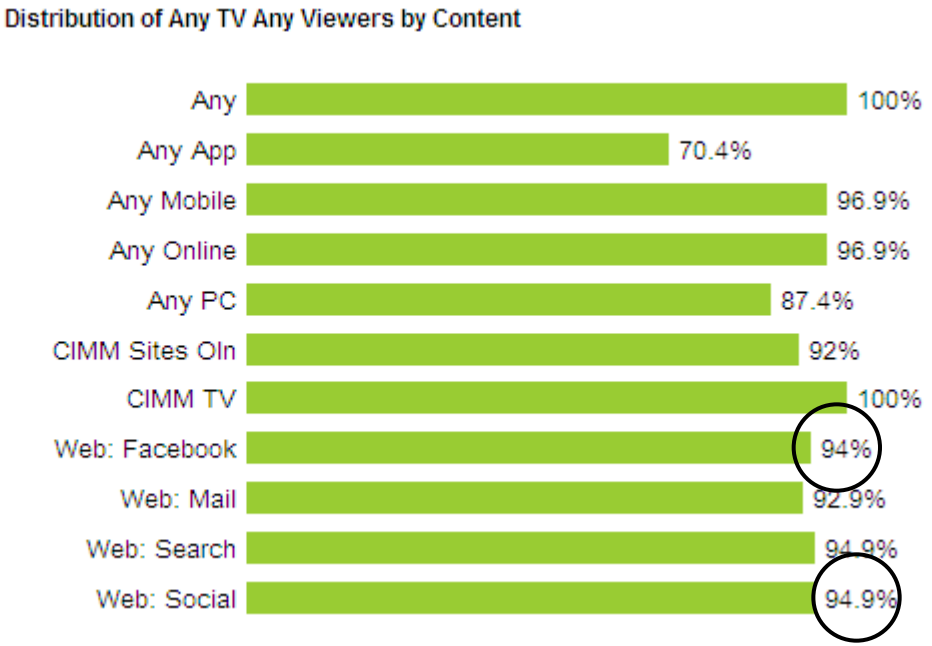
High Level Insights



»Social Media Usage

- 9-of-10 users or (94%) who viewed CIMM Media Company Member's TV content also visited Facebook
- 95% of users who viewed CIMM Media Company Member's TV content visited *OTHER* popular social media sites (Twitter, LinkedIn, GetGlue, Myspace.com, Foursquare)

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Acknowledgments and Lessons Learned

Cross-Platform Panels

- High quality, single source cross-platform panels provide critical linkages for scalable solutions
  - Alternatives to linking single source, 3-screen foundational data to other data sources in order to gain scale must be considered
- Single source, three-screen panel recruitment and empanelment techniques will continue to be refined and improved
  - Incentive structure, monitoring of operating upgrades on phones, clarity of panelist instructions
- Measurement of Apple products is essential for representing cross-platform usage
  - Plans are in the works for adding measurement of Mac Computers, iPhones & iPads

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Acknowledgments and Lessons Learned

Cross-Platform Data

- Syndicated approaches to cross-platform reporting will require industry consideration to ensure appropriate comparisons are being made across media
  - Standards will be necessary
- The definition of a “three-screen user” will need to be continuously evaluated based on ever changing consumer habits
  - Does a person have to access all three screens each day to be a three screen user?
  - Should tablets be considered the fourth screen?
- Intuitive software and analysis resources are critical for mining data and gleaning actionable insights
  - Internal or external resources must be identified for working with this new dataset

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