

Cracking the Cross-Media Code

How to Use Single-Source Measures

to Examine Media Cannibalization and Convergence

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ESPN Research + Analytics has developed seven basic concepts of cross-media research and behavior by examining behavioral cells of users and usage. They found that the heavier user of one medium tends to be a heavier user of other media. Cross-media usage is not a zero-sum game—rather, the media pie is growing because of “new markets of time.” While earlier speculation focused on convergence, time spent using more than one medium at a time is limited. Media users are using different media platforms at different times and in different places for different purposes—the best available screen for their location.

INTRODUCTION

The media community faces many challenges as consumers adopt new media behaviors. A few starters:

- Who is engaging in digital media?
- How much has behavior really changed in the past few years?
- Is there such a thing as “cannibalization,” or can new media and traditional media coexist?
- Is the consumer’s attention so divided by media multitasking that ad effectiveness is compromised?
- Do we need new metrics to measure this new behavior?
- Is media use a zero-sum game or can the pie get bigger?

There is still much more we need to understand about cross-media behavior. Using a variety of single-source studies, ESPN has developed a simple method of analyzing this behavior and has distilled some basic principles of media behavior that are consistent across sources. The information answers many of the “big” questions about cross-media use.

This article represents not just a summary of the best available sources on cross-media usage but points out consistent patterns in all of these

sources. The authors and ESPN did not confine the research or analysis to the field of sports (or to ESPN) but studied total media behavior.

CROSS-MEDIA RESEARCH

Methodology

“Single source” and “data fusion” are two ways of researching cross-media behavior. Each has its advantages and disadvantages (see Table 1).

After years of experience in this field, ESPN believes that both methods are necessary to illuminate the complex field of cross-media behavior. ESPN Research + Analytics relies on single-source data for insight on specific behaviors, as they measure real cross-media usage by each respondent. Single-source research provides its core cross-media findings, but the business requirements of implementing year-round measurement of all media, and connecting media behavior to product consumption across multiple categories can be accomplished only with fusion techniques.

At ESPN, formal research on cross-media behavior began in 2002 when the network commissioned a custom study from Knowledge Networks on consumption of ESPN media platforms. Since then, it has invested in a wide array of data sources, specifically:

TABLE 1
Data Sources for Researching Cross-Media Behavior

	Single Source	Data Fusion
Method	One panel measures multiple media	Individual surveys statistically combined into one dataset
Advantages	No modelling	Virtually any combination of data possible
	Can be longitudinal	Granularity of each survey accessible
Disadvantages	Difficult to recruit representative sample	Combining behavior from two different individuals
	May not yield required granularity for detailed usage analysis	Must be careful to separate statistical artifacts from real behavior changes

Single-Source

- Multimedia Mentor (Knowledge Networks)
- ESPN All Day, Every Day (Knowledge Networks)
- Sports News Tracker (Knowledge Networks)
- Nielsen Convergence Panel
- IMMI
- Media Behavior Institute (Ball State/Sequent Partners)—Sports Media Day I & II

Fusion

- NielsenConnect Fusion
- Nielsen TV + Nielsen Online (Internet)
- Nielsen Mobile
- ESPN Sports Poll
- MRI, CPG (Nielsen HomeScan)

In addition, ESPN has used the Disney Media and Advertising Lab in Austin, Texas, to investigate such specific topics as the effect of screen size on ad impact.

Three Axioms of Cross-Media Research

As ESPN's Research + Analytics team worked with their single-source datasets, certain themes emerged that led to the development of a consistent analytical approach that was based on behavioral segmentation. This method, in turn, was

based on ideas that the researchers found to be axiomatic:

New media create new strata (not new universes) of users. When digital video recorders (DVRs) were introduced, many speculated that their technology would lead to an all-on-demand programming universe wherein the 30-second spot was dead. In fact, DVR penetration has leveled off at about one-third of U.S. TV households and accounted for just six percent of all TV viewing during fourth quarter 2009 (based on DVR Playback by Persons 2+).

When a new technology enters the marketplace, some people adopt it (in combination with other previous technologies), others do not. In most cases, only a minority of the population embraces the new technology.

Complicating the analysis of such technology is a usage curve for these devices. Not every owner uses it every day. For example, some households have access to the DVR technology but do not use it at all.

If people really did adopt new technologies wholesale and use them consistently, cross-media research would be much easier. New technologies create small cells of complicated combinations with existing technologies, however, and these owner/user cells became a major focus of ESPN's research.

There is still much more we need to understand about cross-media behavior.

There are no new metrics. New media, many contend, demand "new metrics" to properly measure their use—methodology that is different in nature and substance than "traditional metrics" that apply to "traditional media." ESPN has found such assertions to be misleading. For example, it may seem that "rating" as a metric applies specifically and exclusively to TV or, perhaps, radio. *Rating*, however, is a term that means "average audience" or the percentage (or number) of viewers or listeners in an average minute. To assert that a specific term cannot be applied in new-media situations is a logical fallacy and misses the point that these terms represent fundamental ways of looking at human behavior.

In fact, there are just three things we need to know about media behavior, no matter what the label:

- **How Many** people engage in the behavior?
- **How Often** do they engage in the behavior?
- **How Long** do they spend with the behavior, in average or in total?

These basic measures are called different things in different media. For example, "How Many" is "Reach" for TV and "Uniques" in the Internet. "How Often" is "frequency" in TV and "visits" in the Internet. TV employs average usage for "How Long" (as in rating or Average Audience), whereas the Internet speaks of total usage.

ESPN's research speaks of the Users (How Many) and their Usage (How Often/How Long).

Users and usage are not interchangeable. Cross-media comparisons often compare apples to oranges—studies, for instance, that compare Internet uniques (How Many) to average audience in TV (How Long). Clearly, “How Many” is not the same thing as “How Long,” and they are careful to maintain that distinction.

A specific example: If we look at the viewers of ESPN on television, (Reach), about half are male and half are female. This is true but misleading for any practical audience examination. The minutes of usage by each gender (Average Audience) show that males contribute about three-fourths of the consumption and females the remaining one-fourth (see Figure 1).

Behavioral Segmentation: The ESPN User-Usage Table

Given that marketplace innovations create new cells of users in combination

In short, the network's approach is to break users down into cells of media use and account for their usage of each medium.

with previous technologies and services, ESPN's approach focuses on these cells of ownership and usage. Rather than invent new terms for media behaviors, it plainly identifies the various types of users and their usage, being careful to distinguish between the two.

In short, the network's approach is to break users down into cells of media use and account for their usage of each medium. To that end, ESPN defines the cells of usage (in this case, various combinations of ESPN platforms). Then, it examines how each of these cells uses each of the platforms—the amount of time users in each cell spend with each platform in the average week. The result is an “ESPN User-Usage Table” (see Table 2) that the network can use to determine the size of

each cell and that cell's contribution to the usage of each platform and to the overall usage of the ESPN brand.

WHO, WHAT, WHEN

Using the axioms of cross-media research and the method ESPN developed to analyze behavioral cells of cross-media users and usage, it is possible to address some of the fundamental usage questions posed at the beginning of this article.

The primary questions of cross-media behavior boil down to two essential issues: *cannibalization* and *convergence*.

With cannibalization, we ask, do new media grow at the expense of traditional media or is there some other way that both behaviors can flourish? To what degree does a newer medium begin to serve the functions of a traditional medium or do the uses of one somehow remain distinct from the other?

With convergence, we ask, are people now using more than one medium simultaneously, that is to say “multitasking?” Is that a way of squeezing more media behavior into the same amount of time?

Do New Media Cannibalize Traditional Media?

We know from panel measures for each platform that time spent with digital media is increasing rapidly, particularly time spent with mobile Web. At the same time, people are spending more time than ever with television (see Table 3).

If it were true that digital media were growing at the expense of television, the heaviest users of digital media would turn out to be the lightest viewers of TV. ESPN

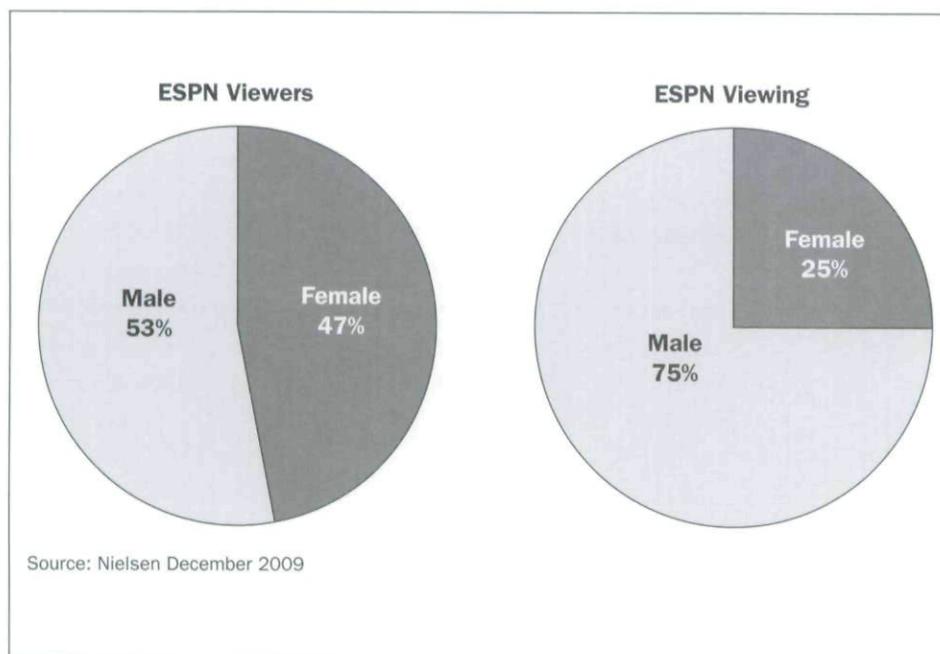


Figure 1 The Difference Between “Viewers” and “Viewing”

TABLE 2

A Standard "ESPN User-Usage Table" Analysis, Compiled from the Network's Custom Knowledge Network's "ESPN All Day Every Day" Survey of all ESPN Platforms

	ESPN All Day Every Day Spring 2008		Weekly Average h:mm							
	P12-64 (000)	P12-64 %	ESPN	ESPN2	ESPCL	ENN	ESPN .com	ESPN Radio	ESPN Magzn	All ESPN Media
Persons 12-64 Usage	214,287		2:49	0:47	0:10	0:32	0:17	0:36	0:04	5:14
ESPN TV (Net)	91,281	93%	6:35	1:49	0:23	1:15	0:37	1:08	0:09	11:56
ESPN Non-TV (Net)	44,072	45%	7:22	1:56	0:22	1:22	1:19	2:55	0:21	15:37
Total ESPN	97,871	100%	6:08	1:42	0:21	1:10	0:36	1:19	0:09	11:26
ESPN TV Only	53,799	55%	5:09	1:31	0:20	1:01	0:01	0:00	0:00	8:03
Other Platforms Only	6,590	7%	0:03	0:00	0:00	0:01	0:30	3:44	0:10	4:27
ESPN TV and Other Platform	37,432	38%	8:39	2:16	0:26	1:37	1:28	2:46	0:23	17:35
↓										
ESPN TV and Digital	13,232	14%	7:30	1:55	0:32	1:25	1:58	0:00	0:00	13:20
ESPN TV and Radio	8,793	9%	6:17	1:38	0:17	1:49	0:04	5:06	0:01	15:11
ESPN TV and Mag	5,126	5%	6:11	0:58	0:13	1:09	0:09	0:00	1:23	10:02
TV/Digital/Radio	5,018	5%	9:48	2:31	0:35	0:44	3:19	7:03	0:01	24:02
TV/Digital/Mag	2,048	2%	19:32	5:53	0:45	4:06	1:54	0:02	1:20	33:33
TV/Radio/Mag	1,525	2%	19:38	8:54	0:33	3:02	0:00	4:02	1:18	37:28
All Platforms	1,740	2%	10:48	1:13	0:03	1:51	4:05	9:41	1:15	28:56

TABLE 3

Total Year Monthly Average (Population) for TV and Internet, December Average for Mobile

Average Monthly Time with Media	TV h:mm/Person	Internet h:mm/Person	Mobile Web h:mm/Person
2007	139:25	18:10	0:43
2008	143:22	18:43	1:12
2009	145:02	20:15	2:10
Diff 2007-2009	5:36	2:05	1:26
% Diff 2007-2009	4%	11%	197%

Source: Nielsen Media Research (TV), comScore (Internet), Nielsen Mobile (Mobile)

investigated this proposition using multiple single-source datasets.

Using Nielsen's Convergence Panel, ESPN Research + Analytics found that the heaviest in-home users of the Internet watched more TV than other groups and vice versa: The heaviest TV viewers were also above-average in-home consumers of the Internet (see Figure 2).

The ESPN Research + Analytics team then did the same analysis using Knowledge Networks' Multimedia Mentor (see Figure 3) and the custom ESPN version, "ESPN All Day Every Day" (see Figure 4). These surveys asked respondents about yesterday's usage of media and enabled the researchers to examine more combinations of media use. The findings were

Quintile	Internet Mins	TV Mins
INT 1	102	297
INT 2	35	248
INT 3	15	223
INT 4	6	216
INT 5	1	229
Non User	0	190
Average	24	229

ESPN created quintiles of in-home Internet users, and looked at their average amount of TV viewing. The network then separately created quintiles of TV viewers and looked at their average amount of in-home Internet usage. The examples in the foregoing tables are from November 2009.

In the case of the Internet quintiles, the top quintile of home Internet users surfed 102 minutes per day. They also watched 4 hours 57 minutes per day of TV, more than any other group:

Quintile	TV Mins	Internet Mins
TV 1	573	35
TV 2	285	25
TV 3	182	23
TV 4	105	22
TV 5	32	14
Non Viewer	0	9
Average	229	24

The top quintile of TV viewers watched 9 hours 33 minutes per day. They did not use the Internet any less; in fact, they logged more time than other groups.

Source: Nielsen Convergence Panel, November 2009

Figure 2 Quintiles of Media Use in Nielsen's Convergence Panel

Spring 2009	P13-64 h:mm	Top 5tile TV	Top 5tile Internet	Top 5tile Radio	Top 5tile Magazine	Top 5tile Newspaper
All Media	73:04	118:37	114:20	106:44	92:52	96:35
TV	34:13	77:56	36:43	30:32	38:24	41:41
Internet	16:03	18:32	50:41	16:32	19:42	16:51
Radio	14:38	11:52	15:12	49:38	17:20	18:53
Magazine	1:36	1:43	2:18	2:18	6:38	3:50
Newspaper	2:22	3:08	2:54	3:18	5:01	9:22

Source: Knowledge Networks Multimedia Mentor, Spring 2009

ESPN created quintiles of users by medium and looked at their average amount of time spent with other media. The example in the preceding table is from Spring 2009.

In this example, ESPN also found that heavier users of one medium tend to be heavier users of all media. For example, the heaviest user of the Internet spent more than 50 hours per week with the Internet but also spent more time with each of the other media than the average user and more time with media overall.

Figure 3 Quintiles of Media Use in Knowledge Networks Multimedia Mentor

Fall 2009	M12-64 h:mm	Heavy ESPN TV	Heavy ESPN.com	Heavy ESPN Radio	Heavy ESPN Mag
All ESPN	10:22	30:37	31:17	38:27	24:41
ESPN TV Nets	8:25	25:53	20:09	24:32	19:12
ESPN.com	1:00	2:26	8:13	4:25	1:51
ESPN Radio	0:48	2:01	2:39	9:10	1:55
ESPN the Mag	0:09	0:17	0:15	0:20	1:43
ESPN W'less	0:03	0:07	0:14	0:10	0:11

Source: Knowledge Networks Multimedia Mentor, Spring 2009

"Heavy users" of the ESPN platforms are defined as the top half of users for each ESPN media property. The heaviest users of each ESPN platform spent more time with each of the other platforms than the average user and spent more time with the brand overall.

Source: Knowledge Networks All Day Every Day, Fall 2009

Figure 4 Heavy users of ESPN Media in Knowledge Networks' ESPN All Day Every Day

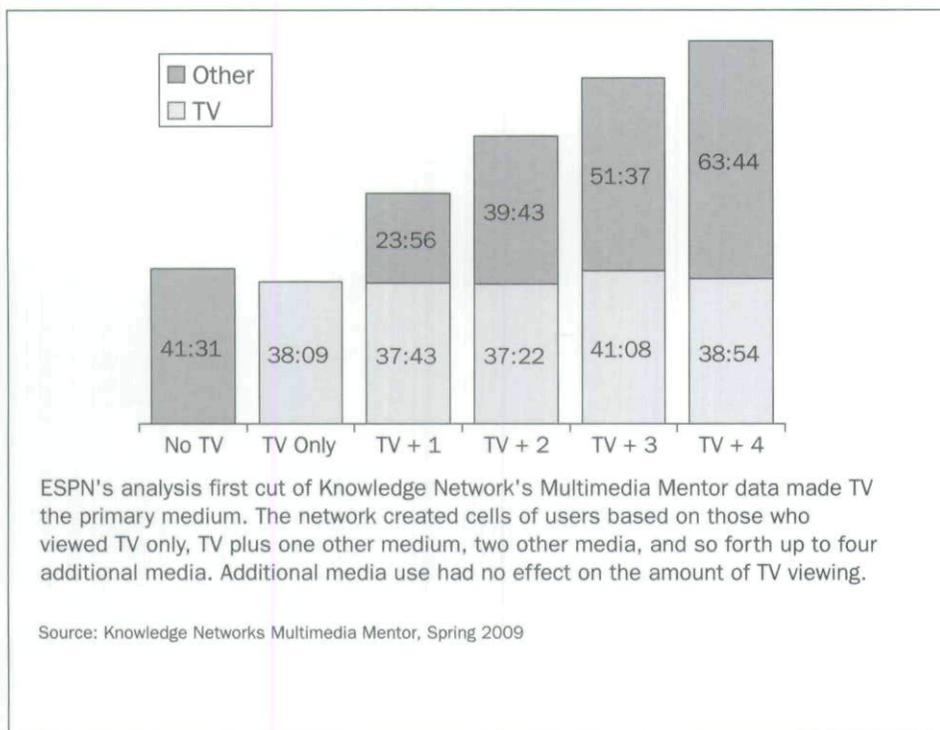


Figure 5 Behavioral Cells of Media Use—TV Primary Medium

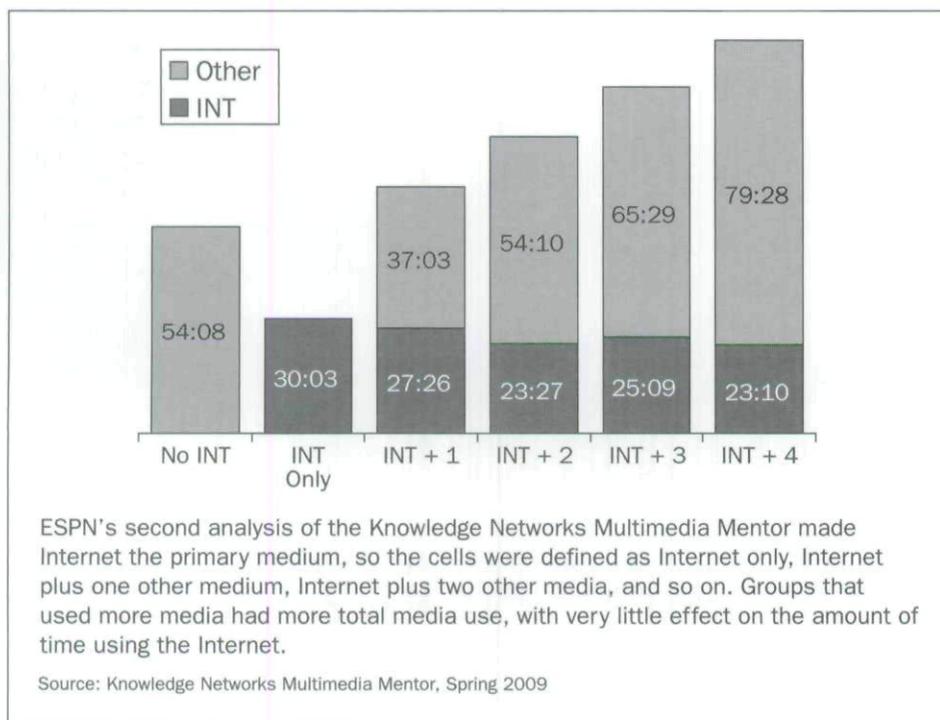


Figure 6 Behavioral Cells of Media Use—Internet Primary Medium

consistent with the results from the Convergence Panel.

Using the ESPN User-Usage Table (and the same data), ESPN's Research + Analytics team created cells of users of one medium, two media, and the like and examined how the additional media use affected usage of the base medium (see Figures 5 and 6).

The data show that the additional media use had no effect on the amount of TV viewing or Internet usage. Rather, additional media use was incremental, and the more platforms a group consumed, the greater their total amount of media use.

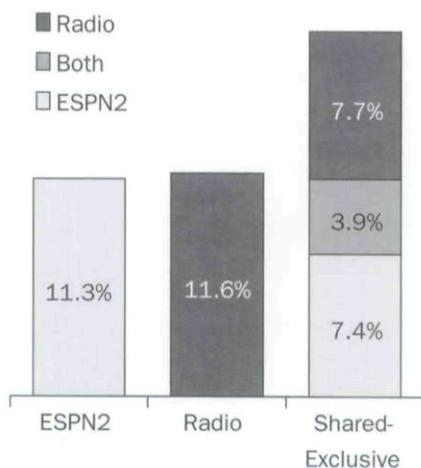
ESPN has worked with IMMI on a variety of projects for a number of years. The Integrated Media Measurement, Inc. (IMMI) cell-phone device passively collects audio signatures from its environment and sends these back to a central collection area, where they are compared to monitored sources to derive media exposure. Using the IMMI national panel, ESPN examined consumption of its "Mike and Mike" program that airs simultaneously on radio and on ESPN2 television every weekday morning (see Figure 7).

Using the ESPN User-Usage table, it is clear that dual-platform users spent more time with the "Mike and Mike" program on TV and on the radio than did exclusive users of either media.

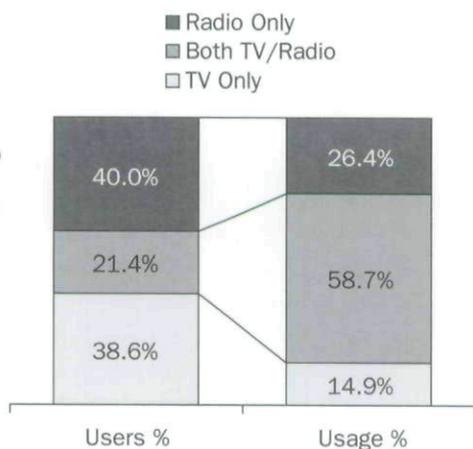
This finding about one medium not cannibalizing another was consistent across the various sources. The general conclusion was that the use of digital media does not cannibalize TV usage. In fact, the heaviest consumers of digital media appear to be above-average TV viewers. From their work on this topic, ESPN's Research + Analytics team derived two additional principles:

- *A heavy user is a heavy user:* Heavy users of one medium tend to be heavy (or at

IMMI monitored ESPN's "Mike and Mike" weekday morning programming in its radio-originating and TV-originating versions and determined which panelists had been exposed to each (or to both). Over the course of the project, both the TV and the radio versions attracted 11.12 percent of IMMI panelists. About 4 percent of panelists were exposed



Those users who were exposed to "Mike and Mike" on both TV and radio represented 21 percent of all users, but they accounted for more than half of the total time spent with the program.



The dual-platform user spent 155 minutes per month viewing on ESPN2 compared to 49 minutes per month for the ESPN2-only viewer; the dual-platform user spent 210 minutes per month listening on ESPN radio compared to 84 minutes per month for the radio-only listener. "Mike and Mike" fans who consumed on both TV and Radio totaled 365 minutes of usage per month.

	Reach %	Average Minutes per Month		
		ESPN2	ESPN Radio	Total
"Mike & Mike" Audience	19.0%	51	77	128
ESPN2 Only	7.4%	49		49
ESPN Radio Only	7.7%		84	84
ESPN2 and ESPN Radio	3.9%	155	210	365

Source: IMMI Jun-Oct 2008

Figure 7 ESPN's "Mike and Mike" Consumption on Radio and TV in the IMMI Panel

least above-average) users of all media. This does not imply that an individual respondent in the top usage cell of one medium will be in the top usage cell of other media; rather, it suggests that the group of persons in the top usage cell of one medium will show above-average usage of other media.

- Cross-media usage is not zero-sum: Doing one behavior more does not mean doing another behavior less—in other words, the growth of one behavior does not necessarily come at the expense of other behaviors.

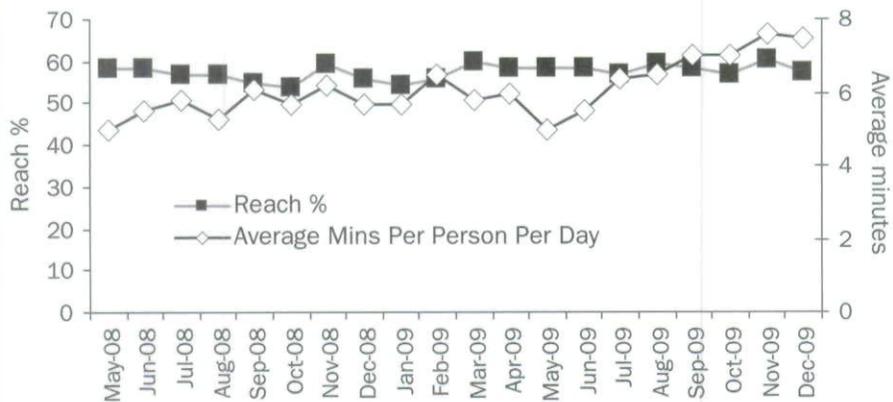
Convergence: Simultaneous Use of Media

Both TV viewing and digital media use have increased over time. Are people engaged in more than one medium at the same time? Is the amount of total media usage growing? Or does the answer rest in some combination of the two?

In a panel of 1,000 households, Nielsen's Convergence Panel makes use of both the People Meter that measures TV viewing and its Online Meter that measures Internet usage. To date, the Convergence Panel has been the only source for monitoring TV usage and in-home Internet usage at the same level of granularity used in the currency measures.

ESPN used the Convergence Panel to investigate the degree to which panelists were watching TV and surfing the Internet simultaneously. While many people are engaging in same-minute TV and Internet usage, the time spent using these media simultaneously is very limited (see Figure 8).

Nielsen's Convergence Panel allows ESPN to examine only in-home TV and Internet use, but there are many other simultaneous combinations such as TV and Mobile; Radio and Internet; Internet and Mobile, and the like. For a different perspective on convergence, in September and October 2008, ESPN worked with



Nielsen and ESPN defined “simultaneous usage” as being registered as a TV viewer in the People Meter and being logged in to the Nielsen Online Meter in the same minute.

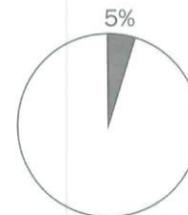
The network found that this behavior was widespread: Six of ten (58 percent) of panelists did at least 1 minute of simultaneous usage in fourth-quarter 2009, a figure that was almost flat when compared to the same period in the prior year (57 percent).

Simultaneous usage grew 28 percent from fourth quarter 2008 (5.8 minutes per day) to fourth quarter 2009 (7.4 minutes per day), but this is still a small fraction of total TV usage and the minority of in-home Internet time.

Source: Nielsen Convergence Panel, May 2008–December 2009

For those who engage in same-minute TV–Internet usage, it represents 5 percent of the time they spend watching TV (just 3 percent among those who watch TV or use the Internet). Simultaneous TV and Internet usage represents only about one-third of the time using Internet in the home.

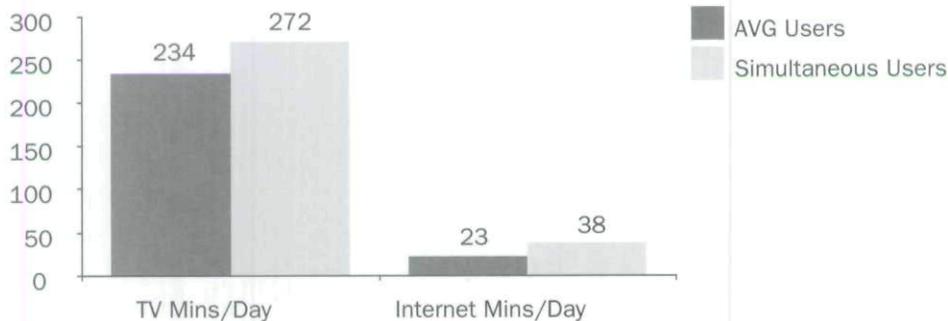
Source: Nielsen Convergence Panel October–December 2009



Percent of TV Viewing



Percent of In-Home Internet Usage



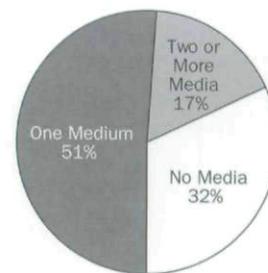
Simultaneous users are heavy users of both TV and Internet. People who engage in simultaneous usage do so because they are spending more time with media, so they are more likely to do both at the same time. Simultaneous users spend 16 percent more time with television and 65 percent more time with the Internet than the average person who uses either TV or the Internet.

Source: Nielsen Convergence Panel, October–December 2009

Figure 8 Simultaneous TV Viewing/In-Home Internet Usage in Nielsen’s Convergence Panel

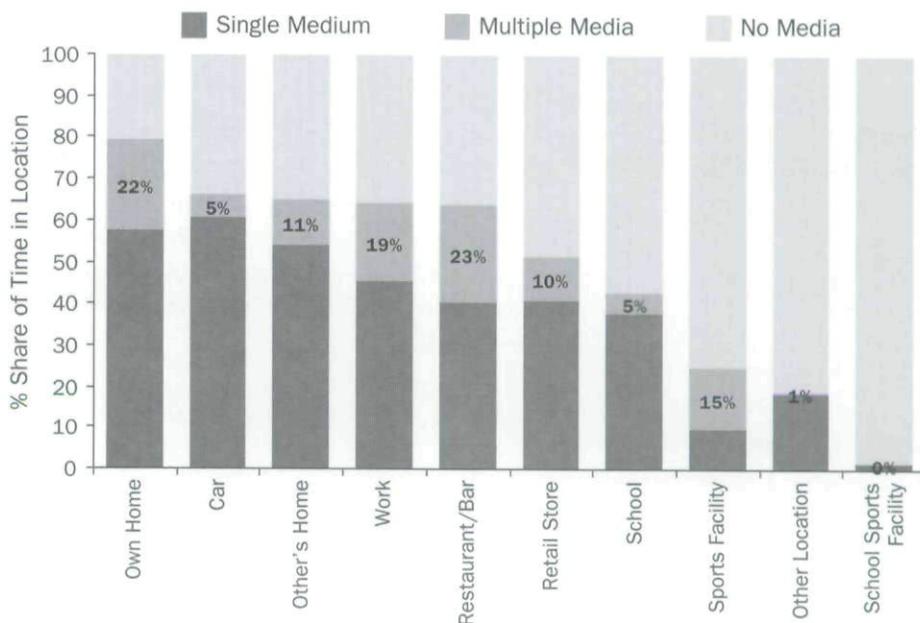
In this study, ESPN saw that about half the days of the “Avid Sports Fans” involved exposure to only one medium at a time—32 percent of the day was spent with no media exposure at all, and just 17 percent of their day was spent using more than one medium at a time. They were more likely to engage in simultaneous usage on Sunday, when 24 percent of their day was spent using two or more media at once.

Source: Media Behavior Institute, SMDI Study, Sep–Oct 2008



Simultaneous media usage occurred most often in the home (22 percent of time at home was spent using two or more media simultaneously), in restaurants or bars (23 percent), and at work (19 percent).

Source: Media Behavior Institute, Sports Media Day Study, Sep–Oct 2008



Eighty percent of the panel used TV and Mobile in the same minute during the day, but they spent less than 15 minutes a day using these media together. TV and Internet was the next most frequent combination, and people spent much more time (85 minutes a day) using these media concurrently.

Eighty-five minutes of TV–Internet concurrent usage is a higher amount than we see in the Nielsen Convergence Panel, but these numbers are not strictly comparable for a number of reasons:

- SMD1 has a very small sample size.
- The panel was recruited to include only M18–34, with high sports avidity, during MLB playoff/NFL regular seasons.
- Nielsen definitions of “simultaneous” and the observers’ definition of concurrency in SMD1 are not the same.

Source: Media Behavior Institute, Sports Media Day Study, Sep–Oct 2008

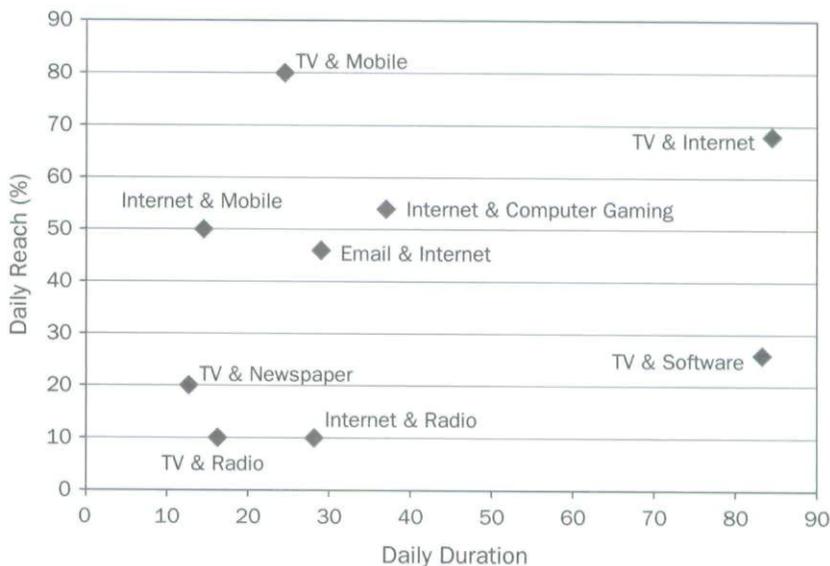


Figure 9 Simultaneous Usage In Sports-Media Day Study

There is no cross-media cannibalization (at least between digital media and TV).

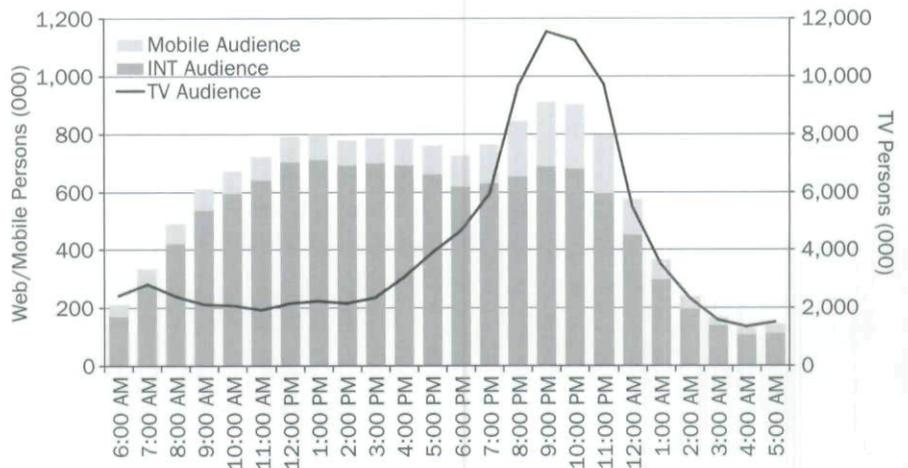
the Media Behavior Institute to field an observational study, "Sports Media Day," (SMD1) with 50 male avid sports fans aged 18 to 34. This study used the same methodology as the CRE Video Consumer Mapping study. The goal was to paint a more complete picture of ESPN's core audiences' lives and the roles of ESPN's various platforms in their lives, including mobile and other emerging media (see Figure 9).

While this study shows more time with concurrent usage due to the different methodologies, there would not seem to be enough simultaneous usage to account for the increase in usage of all media. Therefore, the total amount of time invested in all media must be increasing. The authors account for this with a "New Markets of Time" phenomenon. Media consumption in the past was constrained to specific devices and locations. Opportunities for users were limited, and usage was finite. With digital media, these constraints are lifted: People can consume media throughout the day, wherever they are.

Best Available Screen

Consider the ESPN fan who watches "SportsCenter" as he gets ready for work, listens to "Mike and Mike" in the car on the way to work, uses ESPN.com to keep up with sports news during the day, and either watches ESPN on TV at home or goes out and uses ESPN Mobile.

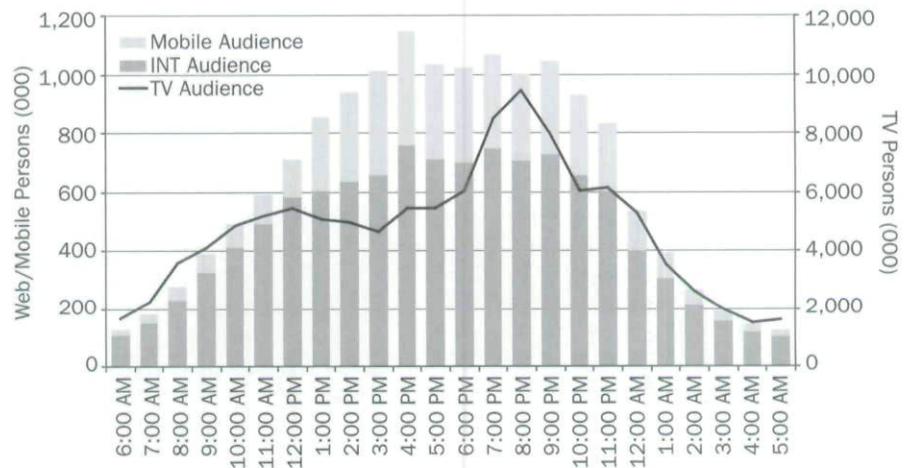
ESPN fans (and persons in general) are using different media platforms at different times and in different places for



Users of ESPN's three screens (TV/Internet/Mobile) on a typical weekday (see preceding):

- Internet usage builds during the day as sports fans go to work. This peaks during the afternoon, when persons on the east and west coasts are working.
- Internet usage goes down after 4 p.m., but TV and mobile usage build to a peak at night. Watching ESPN TV networks is highest during Prime Time, but so is Mobile usage.
- In fact, Mobile usage is higher on Thursday than Monday through Wednesday and higher still on Friday nights, painting a picture of sports fans in out-of-home locations checking on sports events.

Source: Nielsen Media Research (TV), Omiture (Web/Mobile)
Week of December 8-14, 2008, Average Mon-Fri

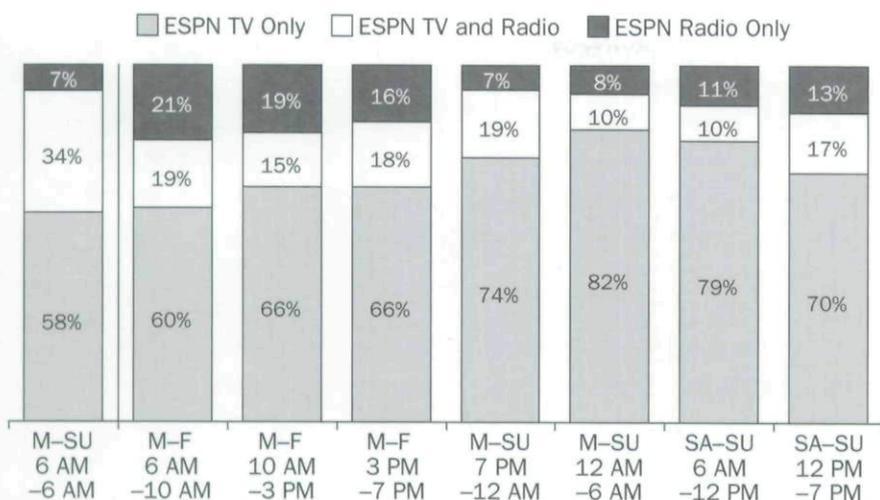


Weekend patterns are different because life activities are different:

- Web usage increases sharply in the afternoon, when games are on. However, Mobile represents nearly half of Web users, as fans follow games in progress as they do errands and visit friends.
- TV usage is higher on weekend afternoons than on weekday afternoons but is still highest in Prime Time.

Source: Nielsen Media Research (TV), Omiture (Web/Mobile)
Week of December 8-14, 2008, Average Sat-Sun

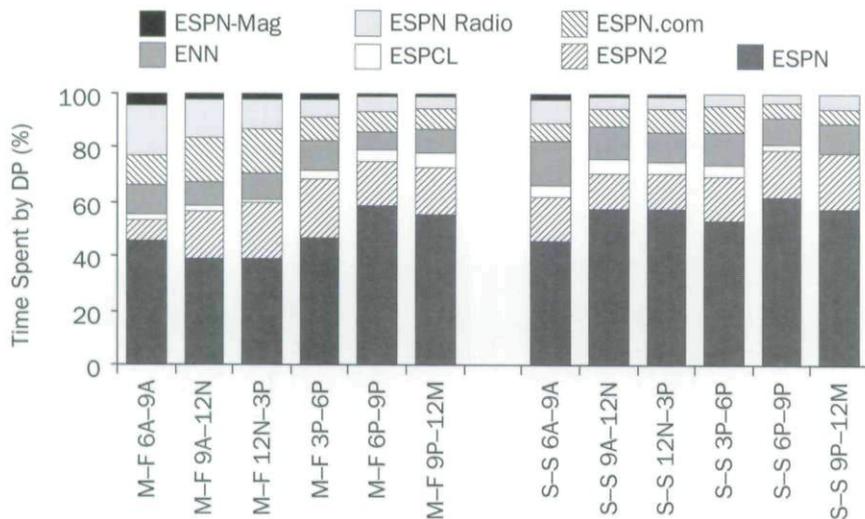
Figure 10 Best Available Screen in Currency Data



From an IMMI study that examined usage of ESPN TV and ESPN Radio, the network learned that shared and exclusive Reach vary by time of day. ESPN Radio had more exclusive users during the weekday morning and afternoon day-parts, while the greatest percent of shared users (TV and Radio) was in the morning (6 a.m.-10 a.m.) and primetime (7 p.m.-12 a.m.)

Source: IMMI, June-October 2008

Time Spent with ESPN Media (Average Week) P12-64



Another example of best available screen comes from Knowledge Networks' ESPN All Day Every Day study. These usage patterns suggest that sports fans adjust their usage of ESPN based on

- day of week/time of day,
- where they are, and
- what they are doing.

Source: Nielsen ESPN All Day Every Day, Fall 2009

different purposes. They are choosing the best available screen for their location.

At ESPN, the "best-available-screen" theory means that cross-media behavior isn't about convergence—it's about the opportunity to follow the sports consumer throughout the day, fulfilling specific needs and building touchpoints (see Figure 10).

CONCLUSION

Early discussion of cross-media usage tended to focus on whether the growth of new media was cannibalizing "traditional" media and the degree to which media users were doing more than one media behavior at a time, dividing their attention (to the detriment of advertiser messaging).

The authors have demonstrated that there is no cross-media cannibalization (at least between digital media and TV). They also have found that although simultaneous usage is widespread, it is very limited in duration, and there is not enough simultaneous/converged usage to account for the continued growth in use of TV and digital media. Rather, the size of the media universe must be growing, as digital devices make media use possible throughout the day, especially in out-of-home locations—a phenomenon the authors have identified as "New Markets of Time."

Seven principles of cross-media research aptly summarize the ESPN Research + Analytics' work in cracking the cross-media code:

1. *A new media will create new strata (not new universes) of users:* There is no "future" where "everybody" will do anything.
2. *There are no "new metrics":* What really matters is how many, how often, and how long.
3. *Users and usage:* "How many" is not "how long."
4. *A heavy user is a heavy user:* Heavy users of one medium tend to be heavy users of many media.

Figure 11 Best Available Screen in Single-Source Studies

5. *Cross-media usage is not zero-sum*: Doing one behavior more doesn't necessarily mean that a consumer is using another medium less.

6. *Simultaneous usage is widespread but limited*: In brief: Large numbers of people, small number of minutes.

7. *Users default to the best available screen*: People use different platforms at different times in different places for different purposes. 

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