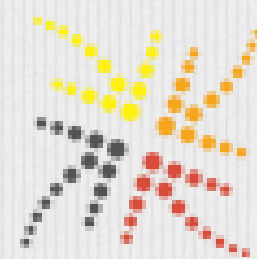




# TALKING SOCIAL TV 2

April 10, 2014



cre

council for research excellence



council for research excellence

## ABOUT THE CRE

The Council for Research Excellence is a body of senior research professionals, formed in 2005 to identify important questions about audience measurement methodology and to find, through quality research, the answers to those questions.

The Council provides the Nielsen client community a means to undertake research projects no one company could undertake on its own.



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## CRE MEMBER COMPANIES







council for research excellence

## CURRENT CRE INITIATIVES

1

**Social TV 2**

2

**Longitudinal  
Ethnography: Devices  
and Viewing Dynamics**

3

**Technology  
Acceleration  
Ethnography**

4

**Cross Platform  
Alignment of Metrics**

5

**Big Data  
Primer**



## **CERIL SHAGRIN**

Executive Vice President, Audience Measurement Innovation and Analytics  
Univision Communications  
Chair, Council for Research Excellence



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Discovery Communications

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The Tribune Company

**Emily Vanides**

MediaVest

**Stephanie Yates**

TV One

**Tom Ziangas**

AMC Networks



## **STUDY OVERVIEW**



# STUDY OBJECTIVES

## Investigate the dynamics of TV-related social media usage

- > Study provides an in-depth look at SM re TV in September/October 2013
  - Fieldwork period facilitates specific focus on new shows and premieres of returning shows
  - Probes deeply about specific social media services

**The study measures all television-related contact points that consumers have during the course of a day with respect to primetime television shows.**

### SPONSOR



### RESEARCH ASSOCIATE



### DATA COLLECTION







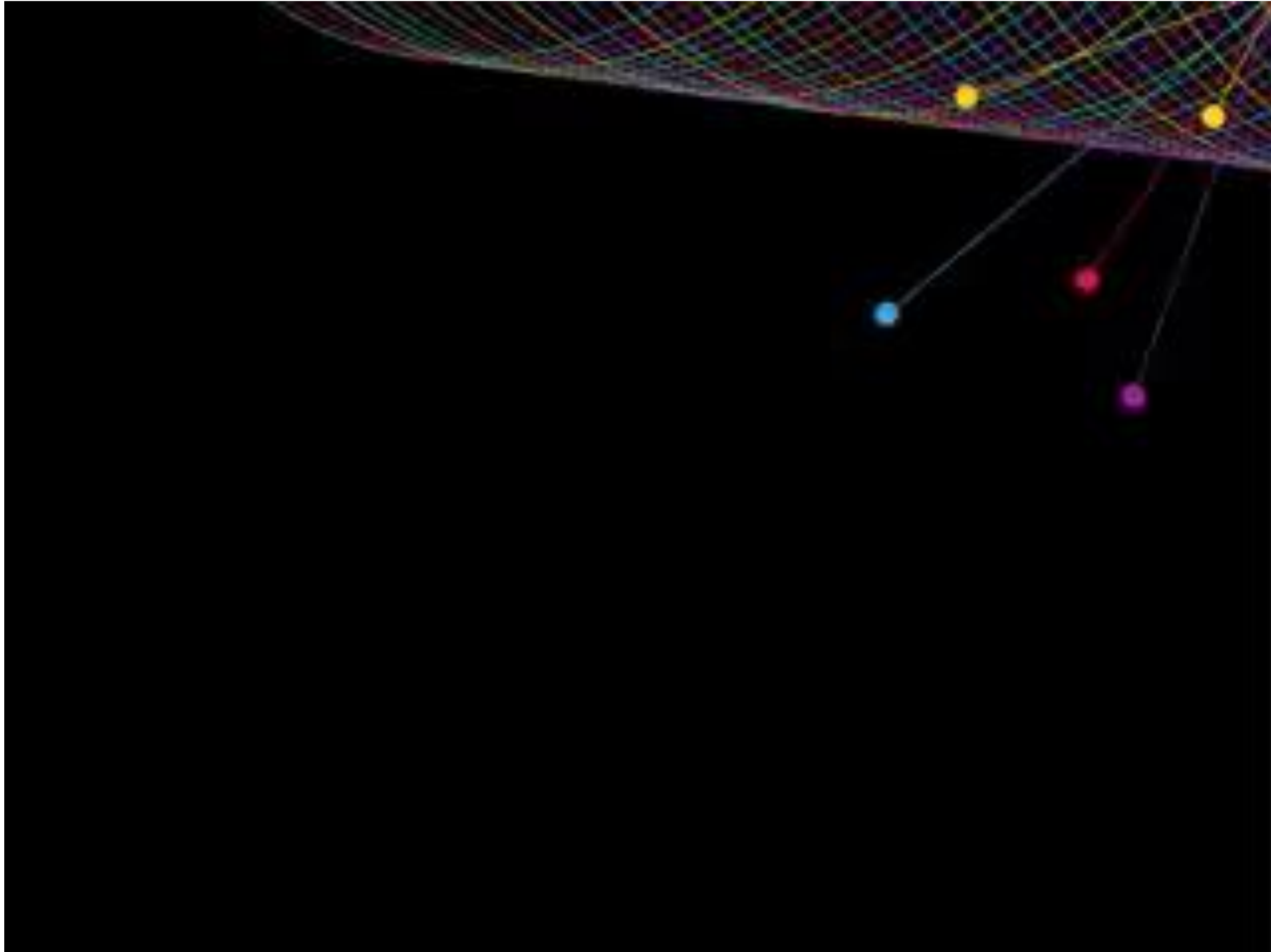
## STUDY OVERVIEW

- > **1,665 respondents** representative sample of the online population, ages 15-54.
- > Respondents used a mobile app to report any time they saw, heard or communicated something about primetime TV shows over the course of 21 days.
  - Diaries dates: September 16 – October 6, 2013\*
- > **78,310 diary entries** about **1,596 shows**.

# PRESENTATION TO COVER

- > Social Media's influence on TV viewing
- > How does Social TV vary by social network?
- > What is the role of Social TV for new and returning shows?
- > Who are Super Connectors and how are they different?
- > Time shifted viewing, device usage and binge viewing

# LET'S TALK SOCIAL TV





SECTION ONE

# **SOCIAL MEDIA'S INFLUENCE ON TV VIEWING**

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# ANALYTICAL DEFINITIONS



## DAILY SM REACH

In an average day people who

- > Interact with TV via SM while viewing, or
- > Interact with TV via SM while not viewing



## SOCIALLY CONNECTED VIEWING

Viewing instances where

- > People viewed specifically because of something they read or saw on SM, or
- > People communicated about the show they were viewing via SM.

# 1 IN 5 ARE REACHED BY SOCIAL MEDIA 1+ TIMES PER DAY RE PRIMETIME TV



## DAILY SM REACH

In an average day people who

- > Interact with TV via SM **while viewing**, or
- > Interact with TV via SM **while not viewing**

19.1%



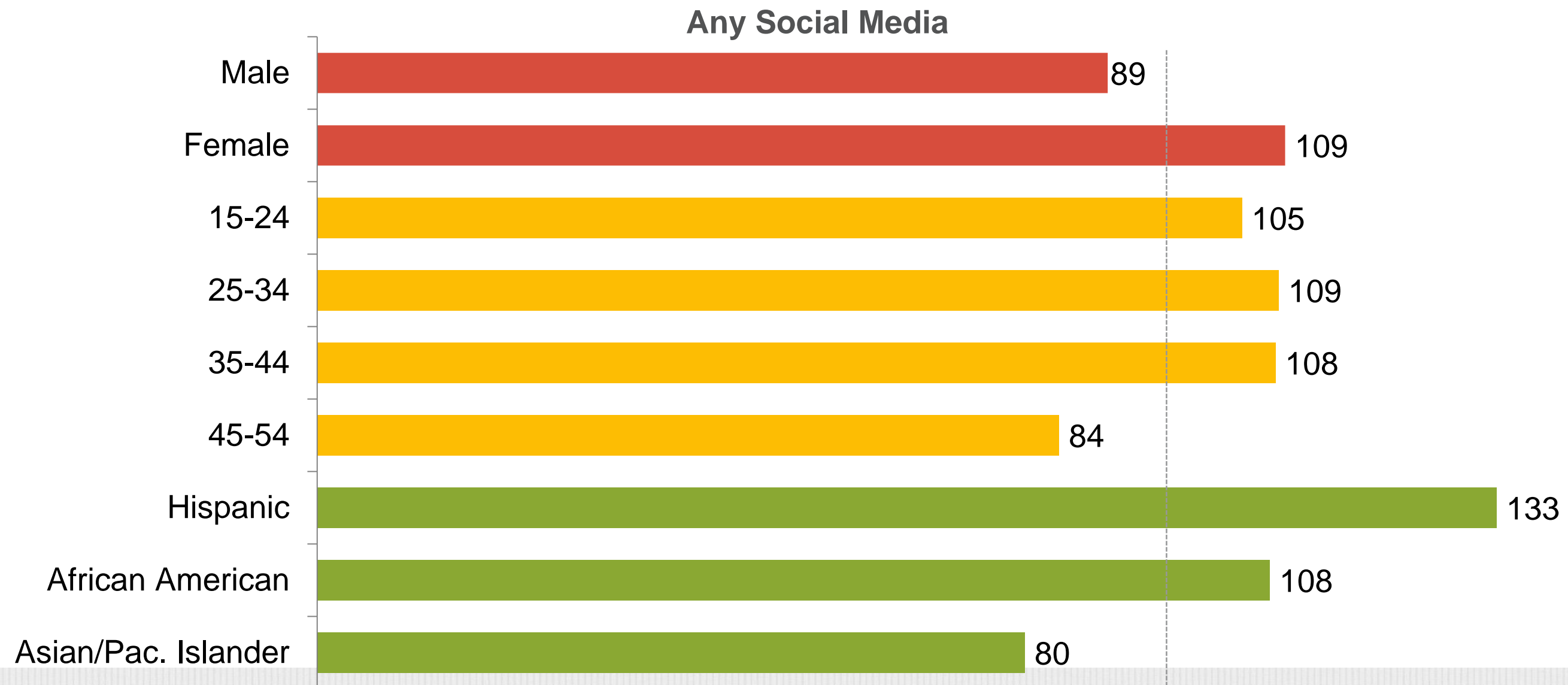


# DAILY TV-RELATED SOCIAL MEDIA USAGE

## SOCIAL TV REACH SKEWS FEMALE, HISPANIC

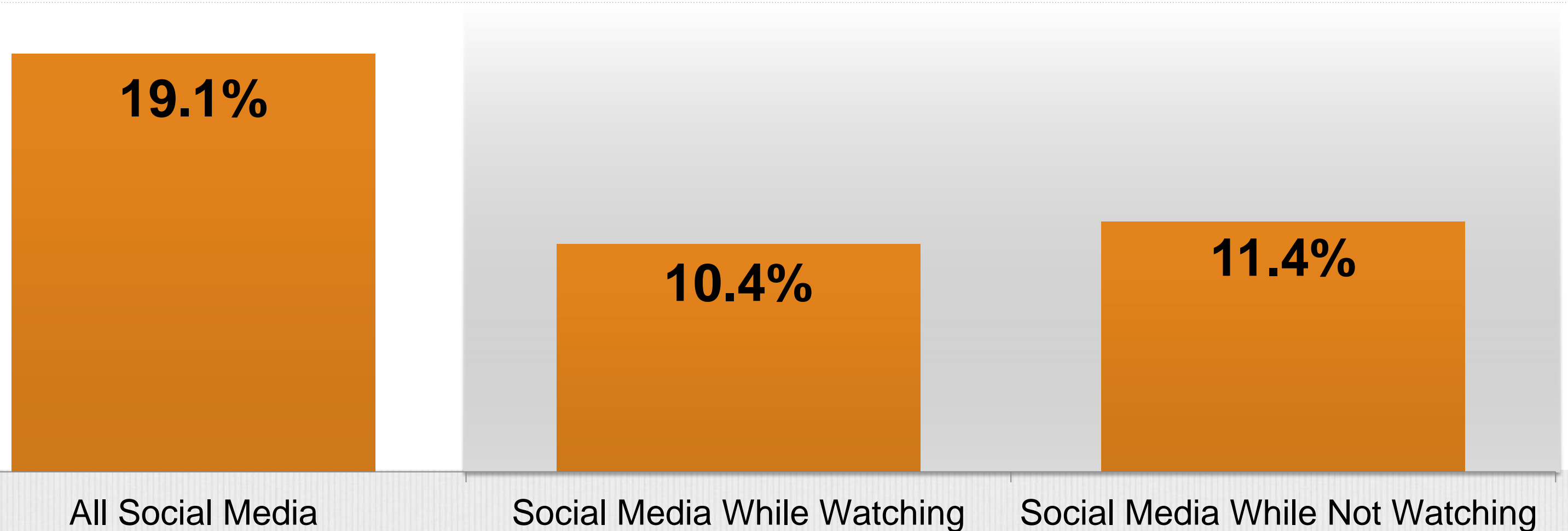
### DAILY TV-RELATED SOCIAL MEDIA DEMOGRAPHICS

*Indexed to Total Sample*

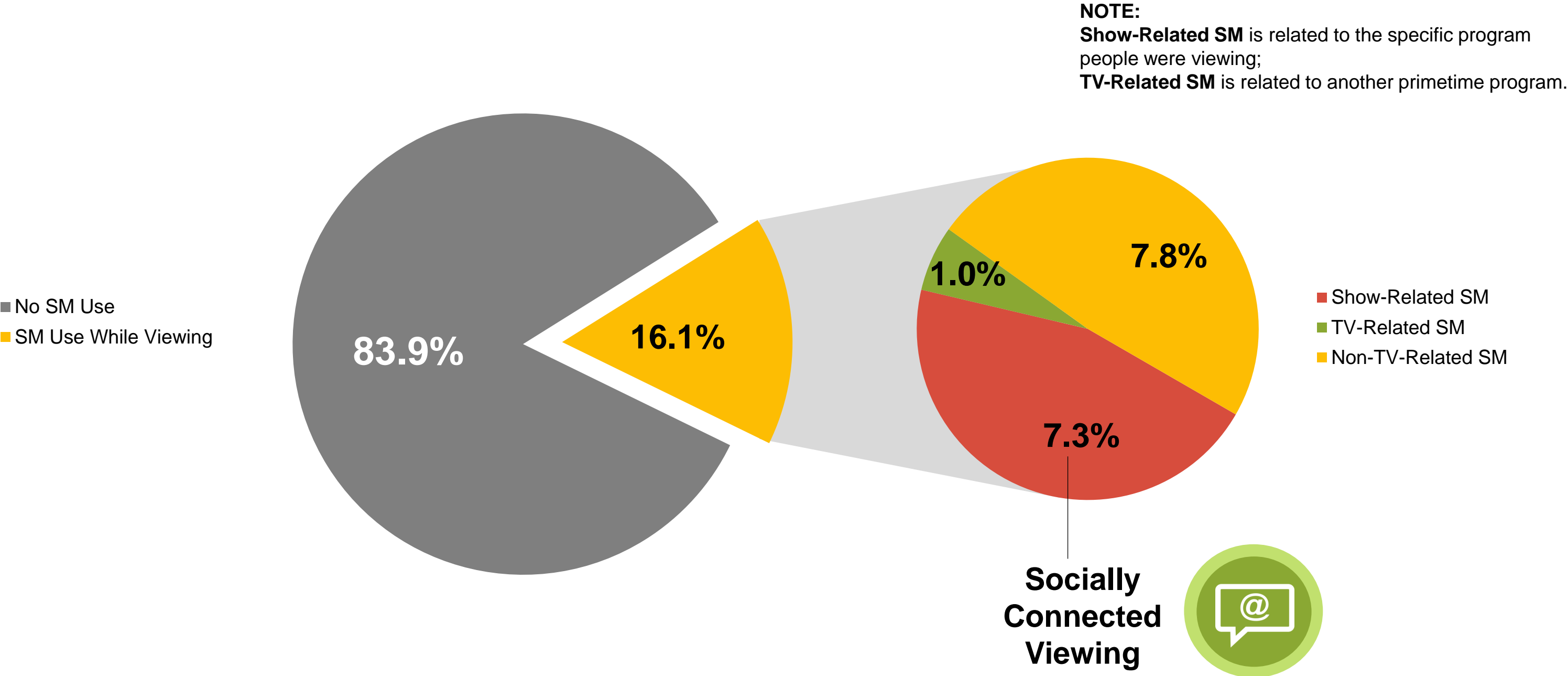


# DAILY SM REACH: ~ EVENLY SPLIT BETWEEN WHILE VIEWING AND NOT VIEWING

## AVERAGE DAILY SM REACH



# 1-IN-6 VIEWING OCCASIONS INVOLVE SOCIAL MEDIA; ~HALF IS RELATED TO TELEVISION



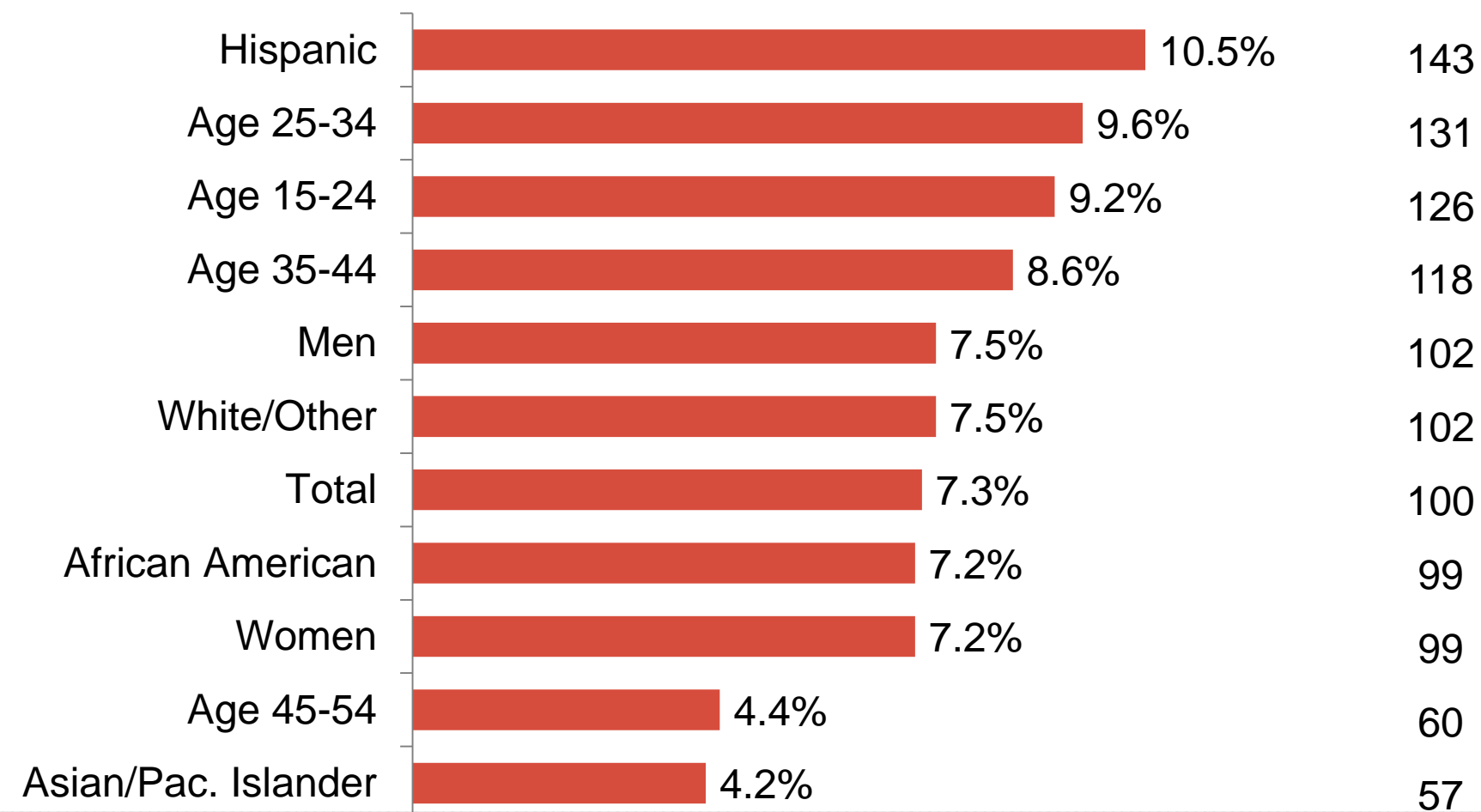
# HISPANICS AND 15-34'S MOST LIKELY TO ENGAGE IN SOCIAL TV

## DEMOGRAPHIC DIFFERENCES

*Indexed to Total*



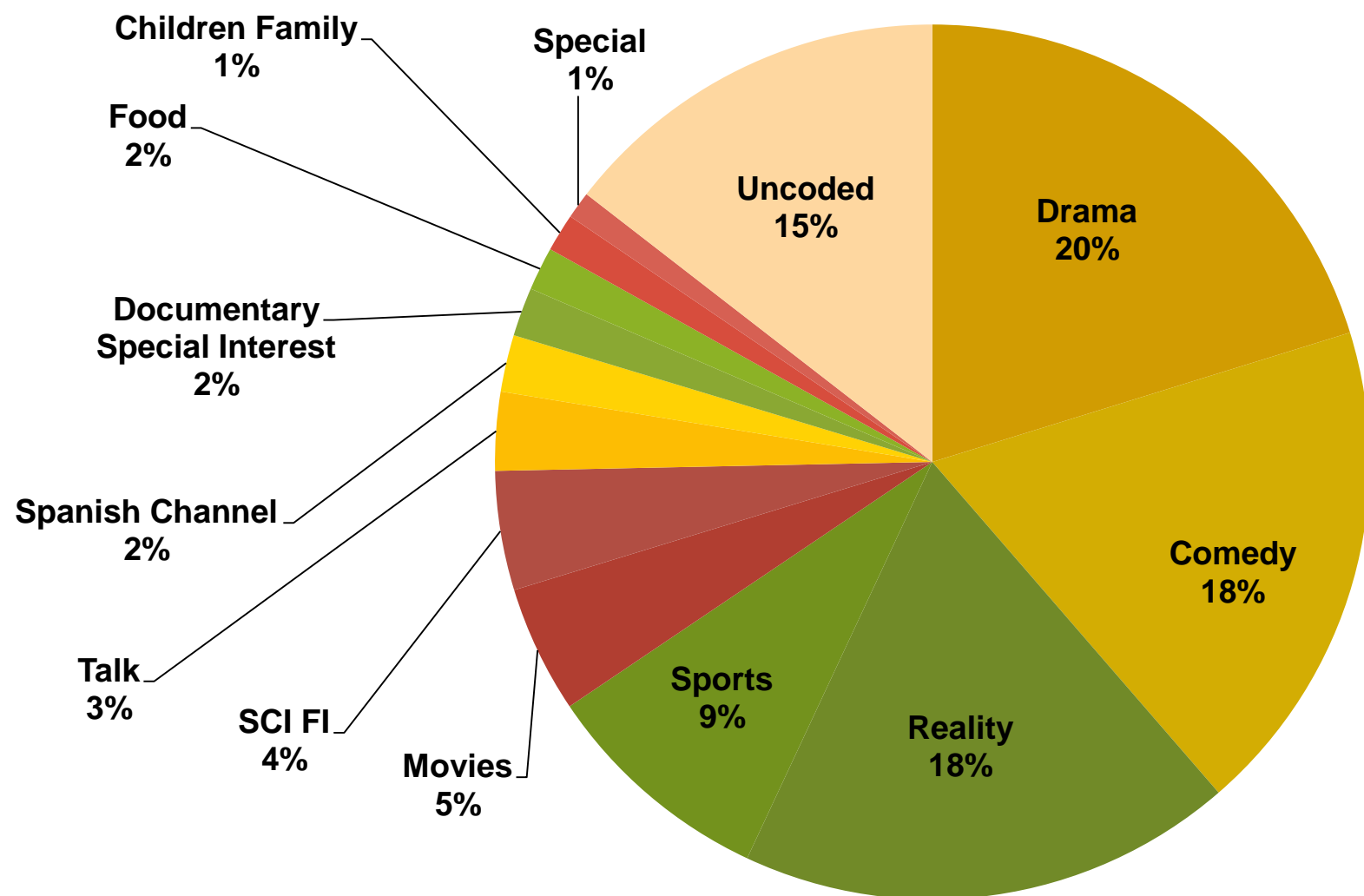
### SOCIALLY CONNECTED VIEWING



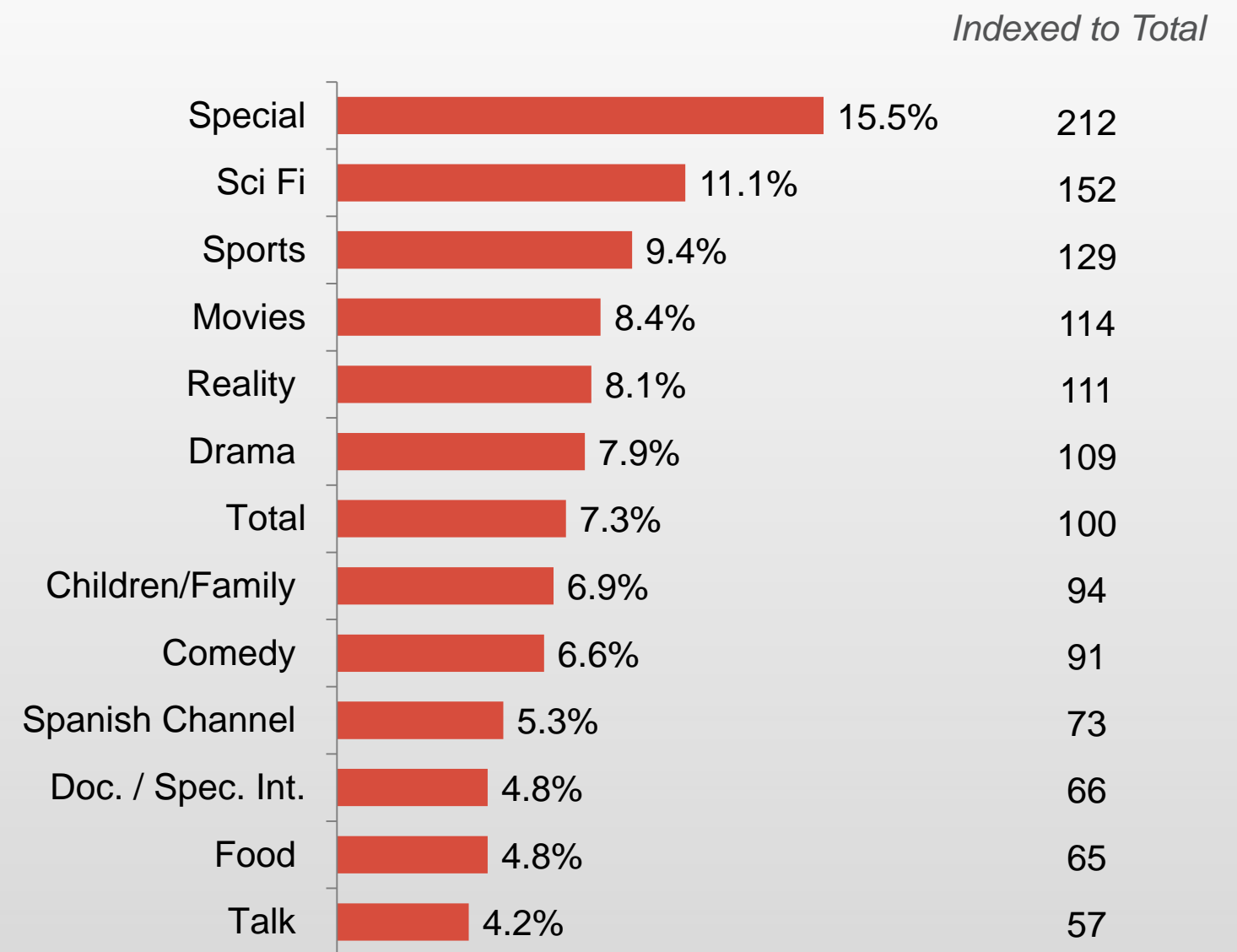


# GENRES MOST INFLUENCED BY SM: SPECIALS, SCI-FI, SPORTS

% OF ALL GENRES  
VIEWED



SOCIALLY CONNECTED VIEWING,  
BY GENRE





SECTION TWO  
**SM USAGE BY  
SOCIAL NETWORK**

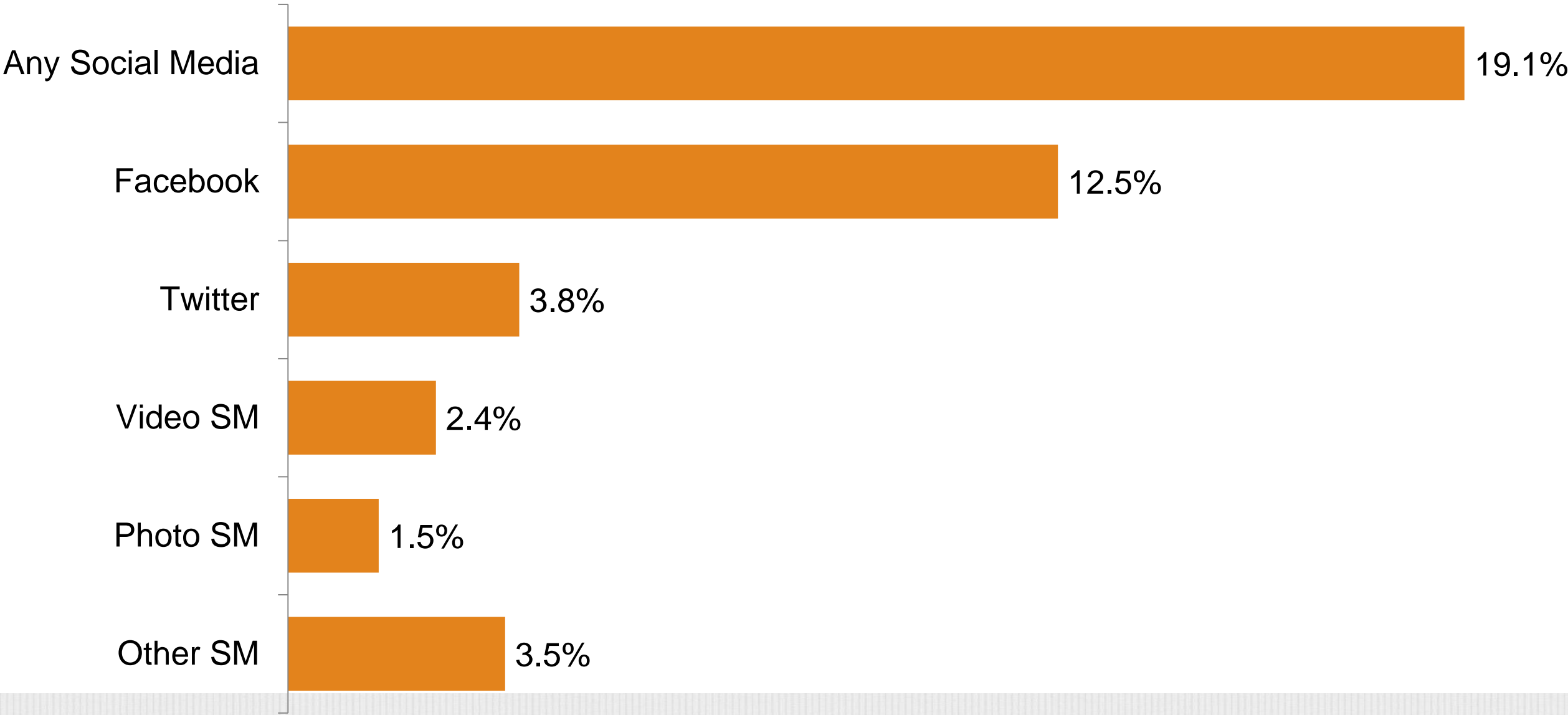
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# DAILY TV-RELATED SOCIAL MEDIA USAGE, BY SOCIAL NETWORK

## AVERAGE DAILY REACH





# DAILY TV-RELATED SOCIAL MEDIA USAGE

## FACEBOOK SKEWS FEMALE, HISPANIC

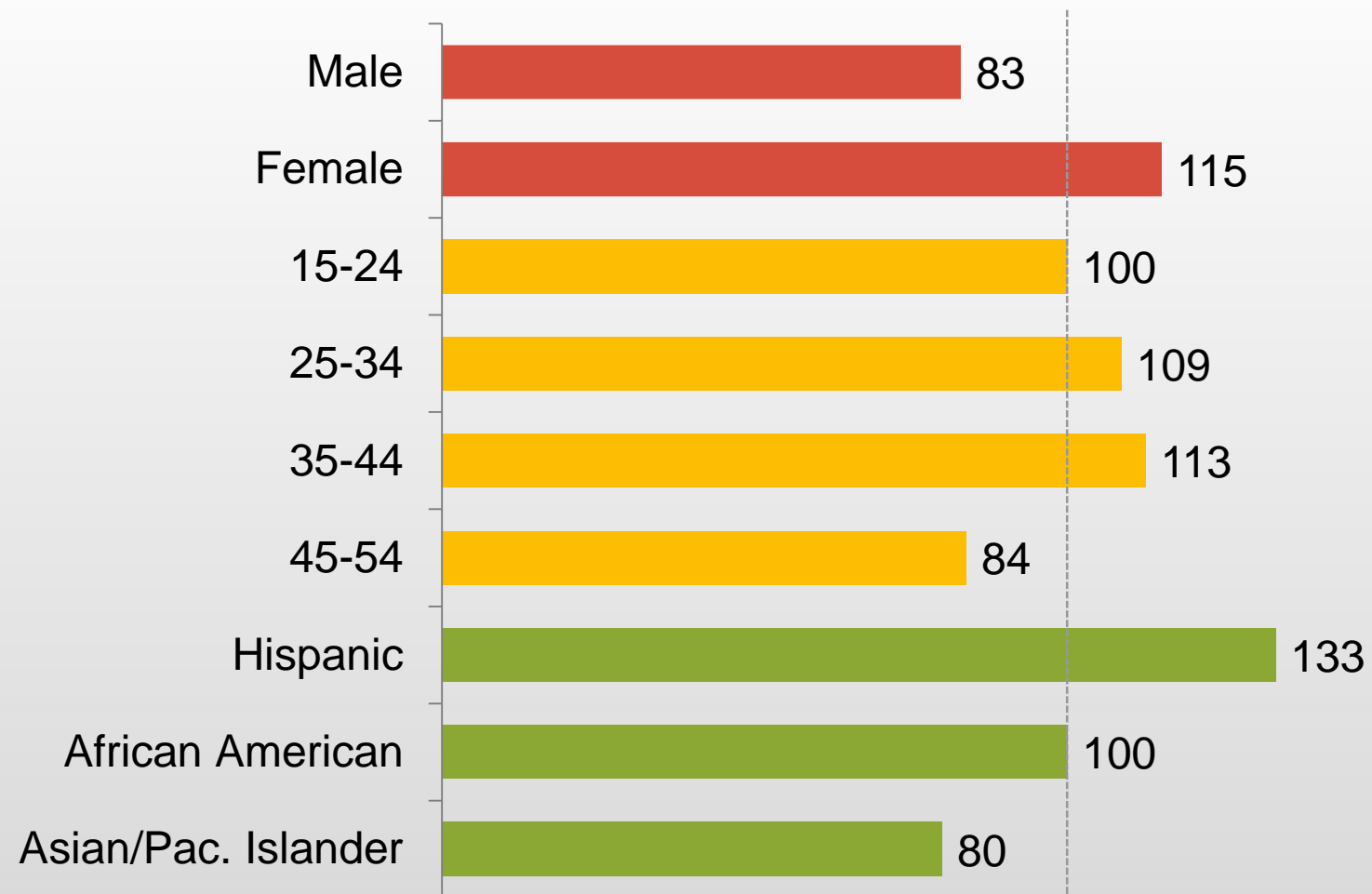


## TWITTER SKEWS YOUNGER

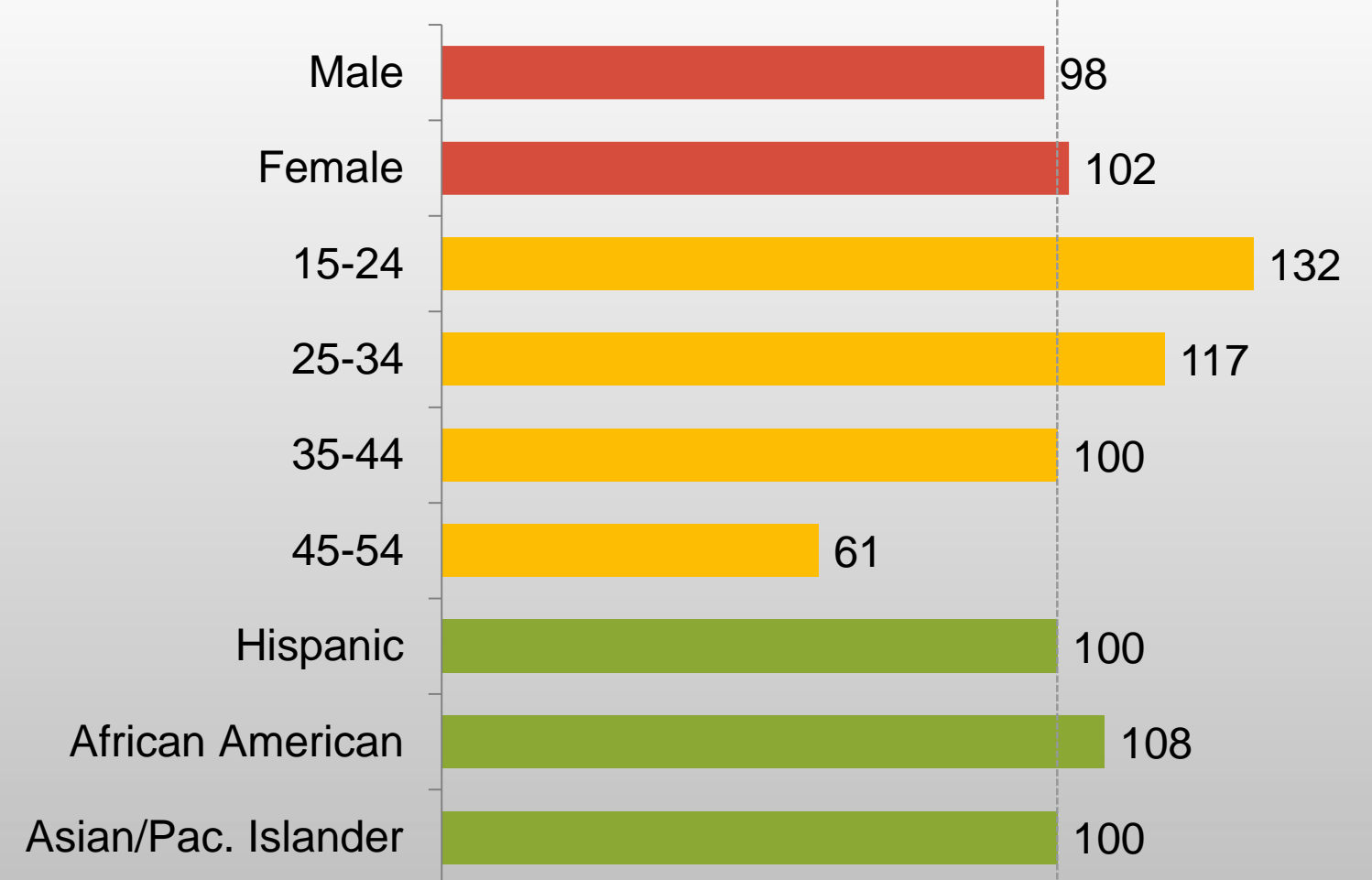
### DAILY TV-RELATED SOCIAL MEDIA DEMOGRAPHICS

*Indexed to Total Sample*

Facebook



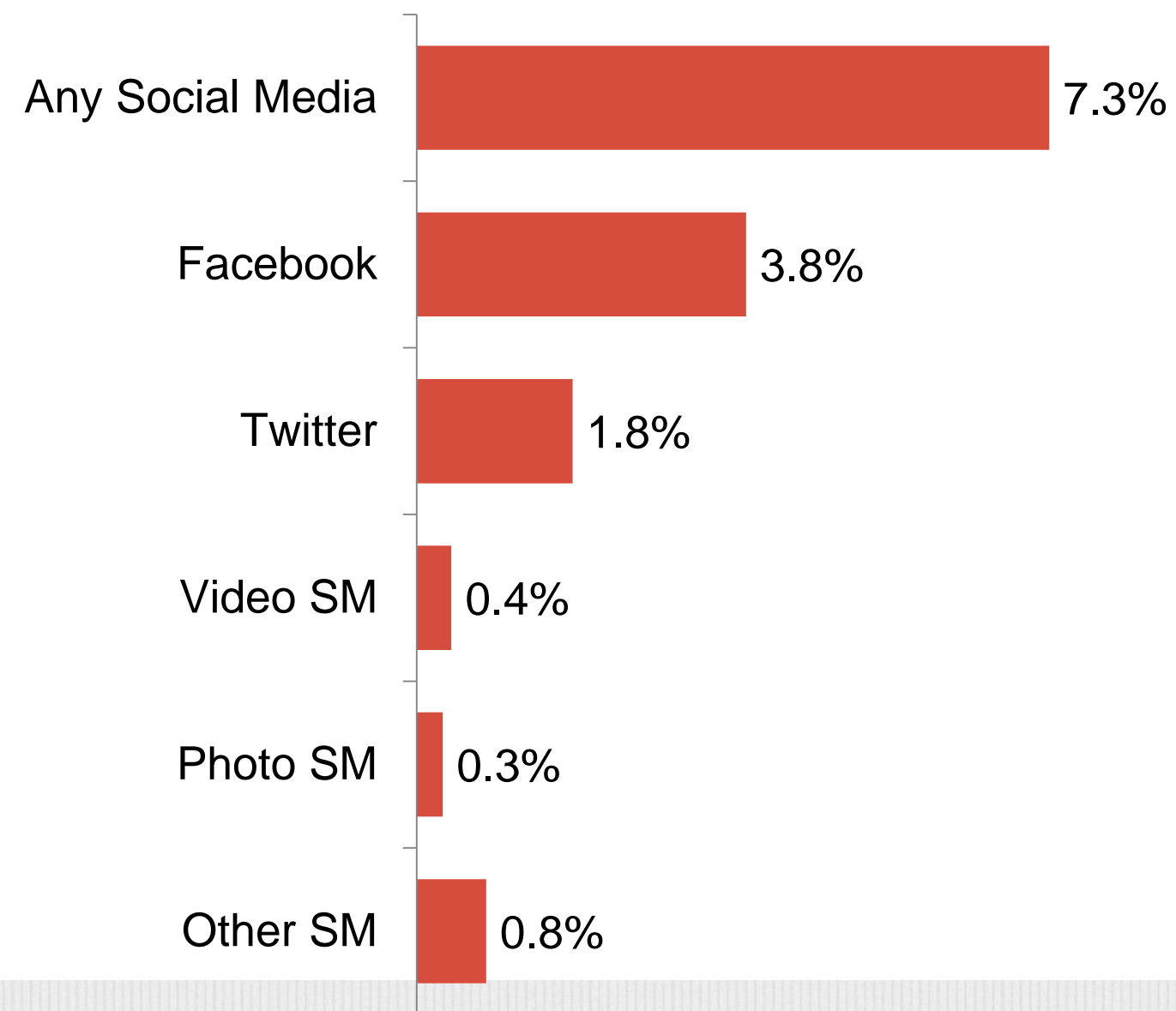
Twitter





# SOCIALLY CONNECTED VIEWING BY SOCIAL NETWORK

## SOCIALLY CONNECTED VIEWING

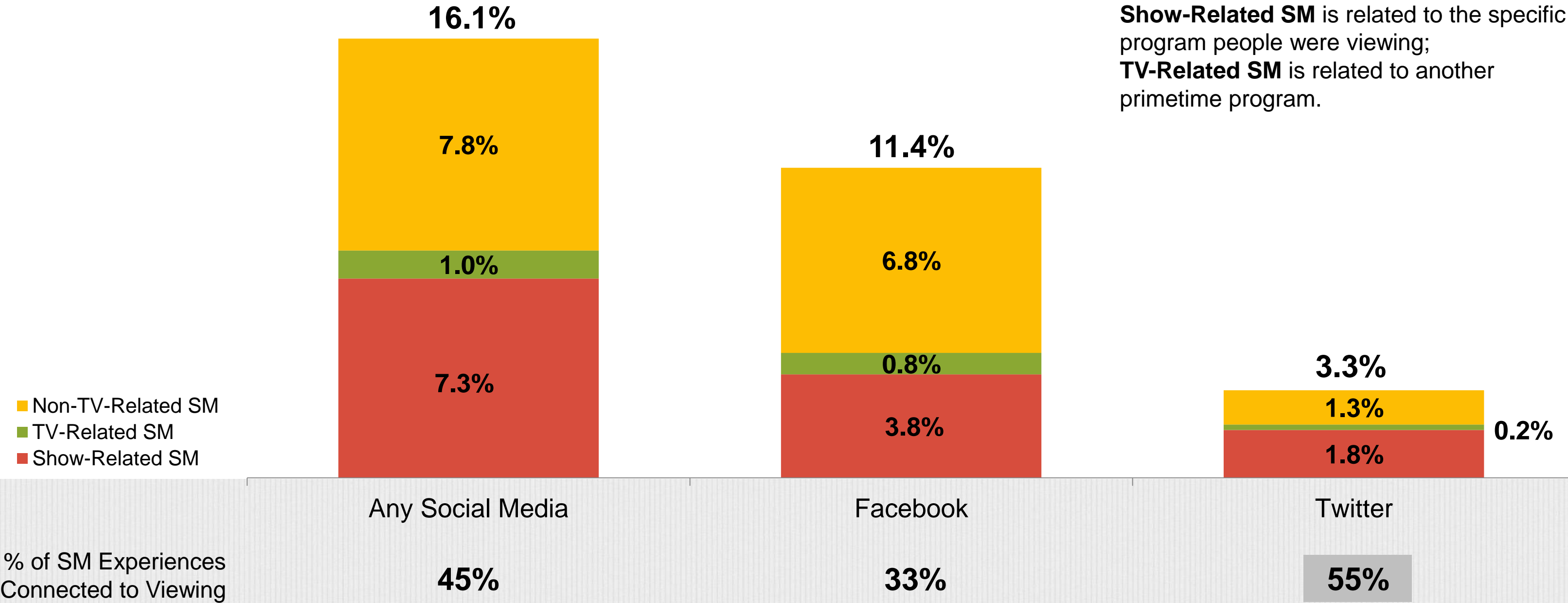




# PROPORTION OF SM USE WHILE VIEWING RELATED TO TV, BY SOCIAL NETWORK

## VIEWING INSTANCES INVOLVING SM

**NOTE:**  
**Show-Related SM** is related to the specific program people were viewing;  
**TV-Related SM** is related to another primetime program.





SECTION THREE  
**PREMIERES OF NEW AND  
RETURNING SHOWS**

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# DISCOVERING NEW SHOWS



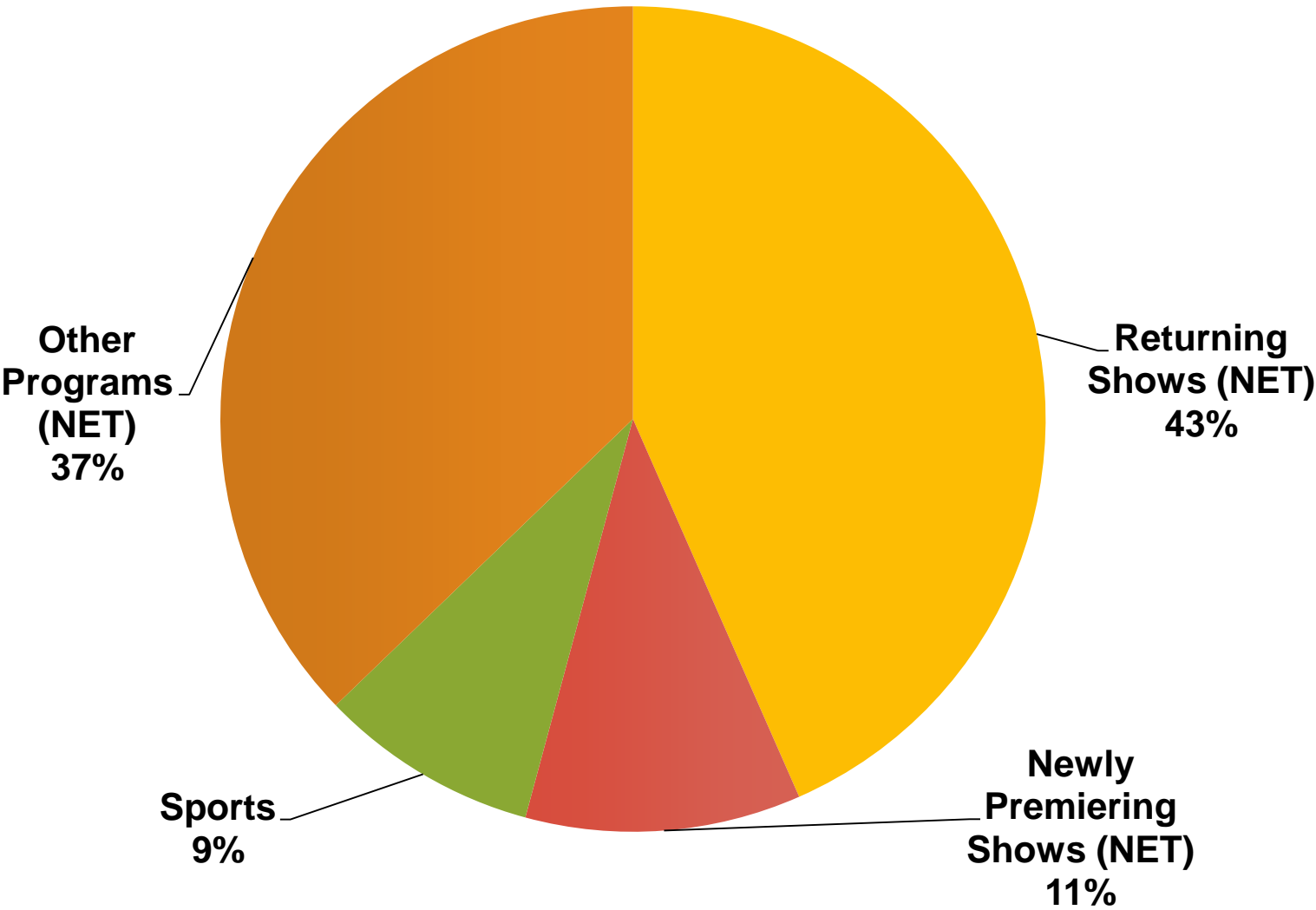




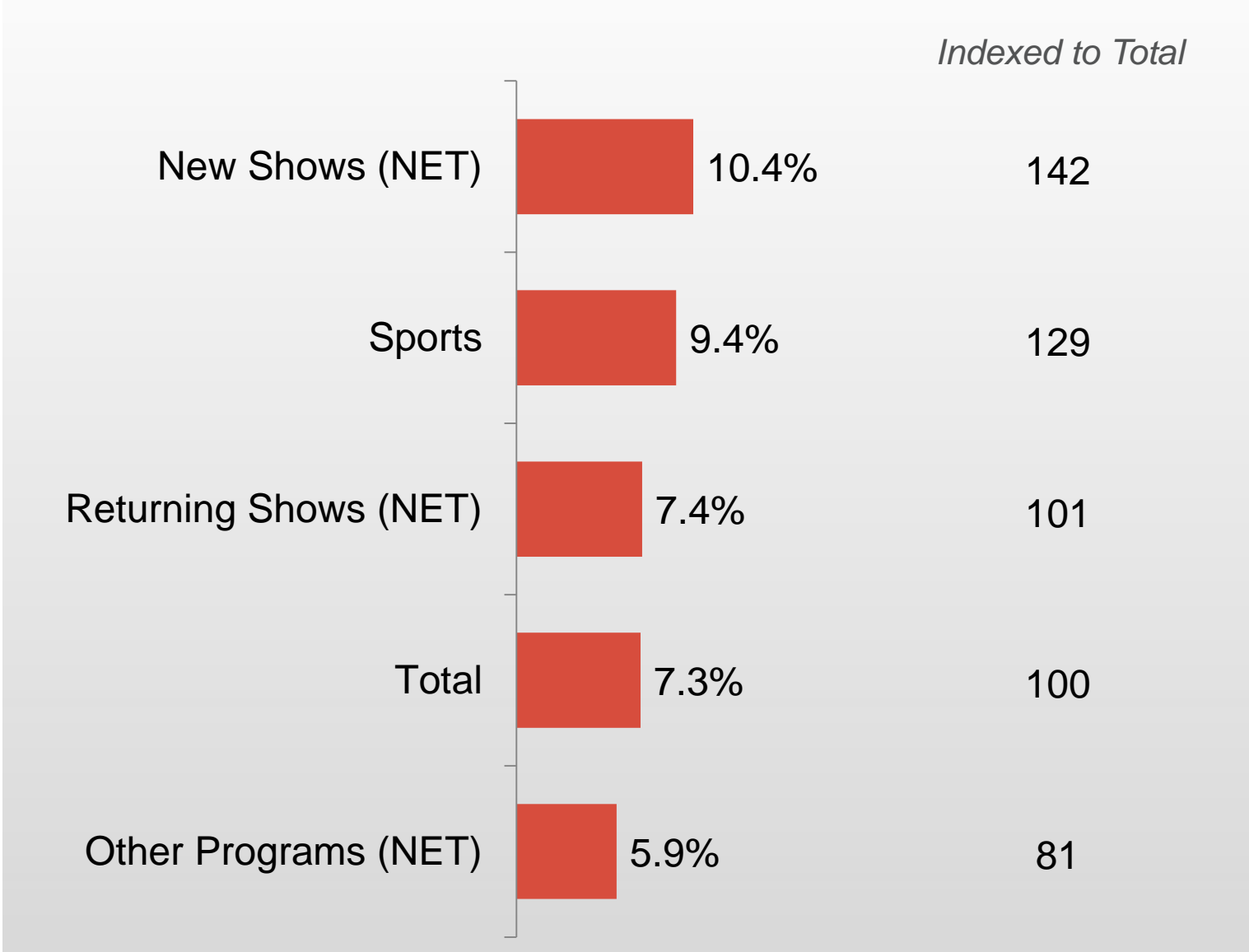
# VIEWERS OF NEWLY PREMIERING SHOWS ARE THE MOST SOCIALLY CONNECTED

**NOTE**  
**Returning shows** are premiering new episodes in their 2+ season in the Fall of 2013.  
**Other Programs** include re-runs, syndication, shows not starting their seasons in the Fall, etc.

% OF SHOWS VIEWED

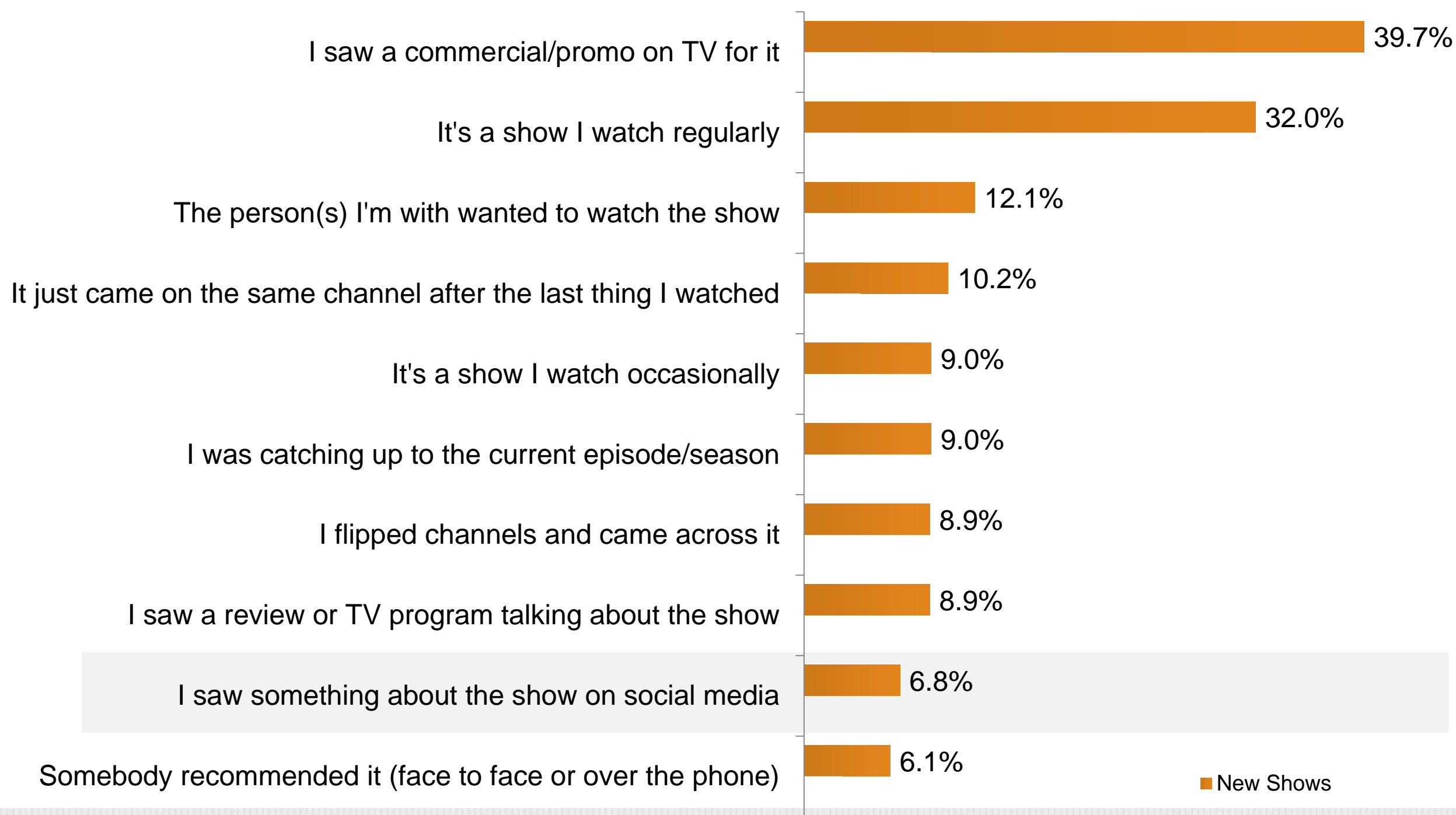


SOCIALLY CONNECTED VIEWING



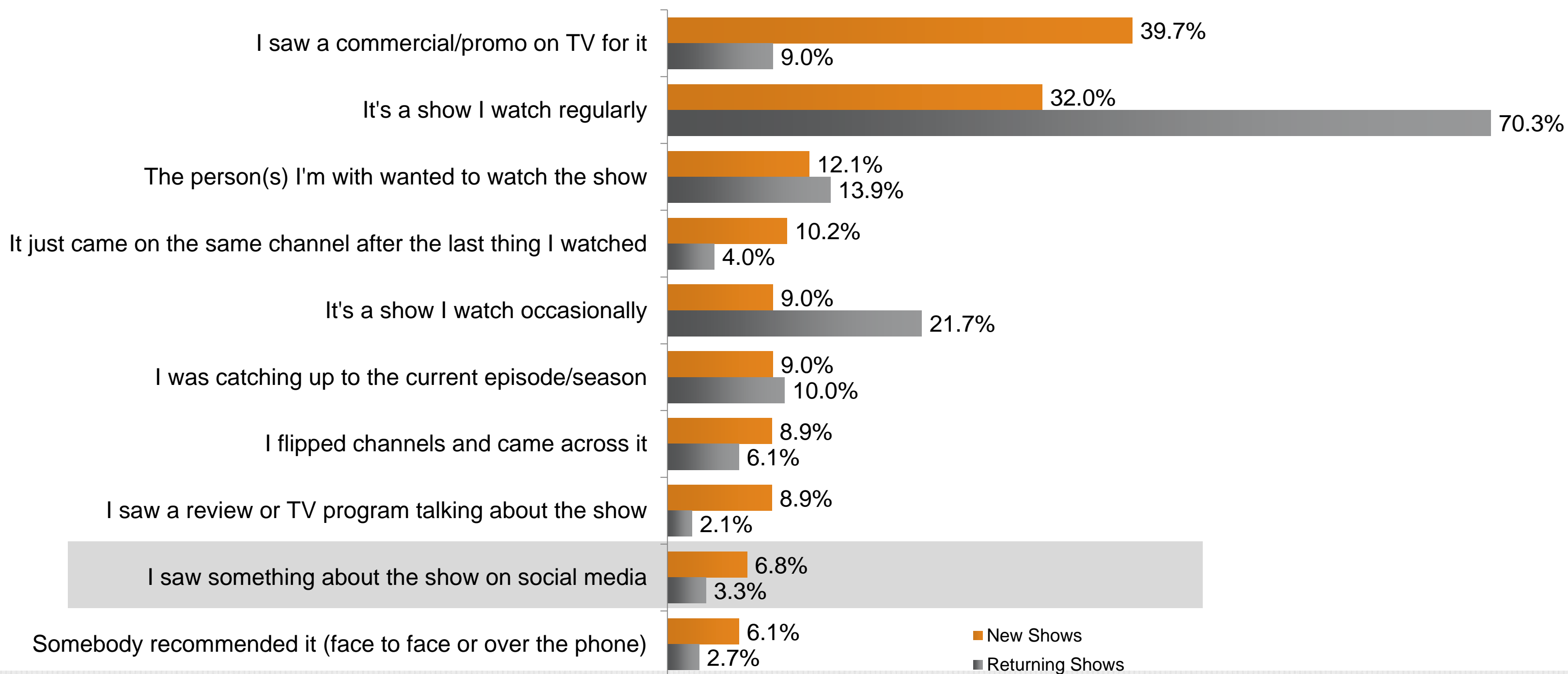


# PROMOS ARE THE #1 DRIVER OF DECISIONS TO VIEW NEW SHOWS





# PROMOS ARE THE #1 DRIVER OF DECISIONS TO VIEW NEW SHOWS





# DAILY TV-RELATED SM REACH

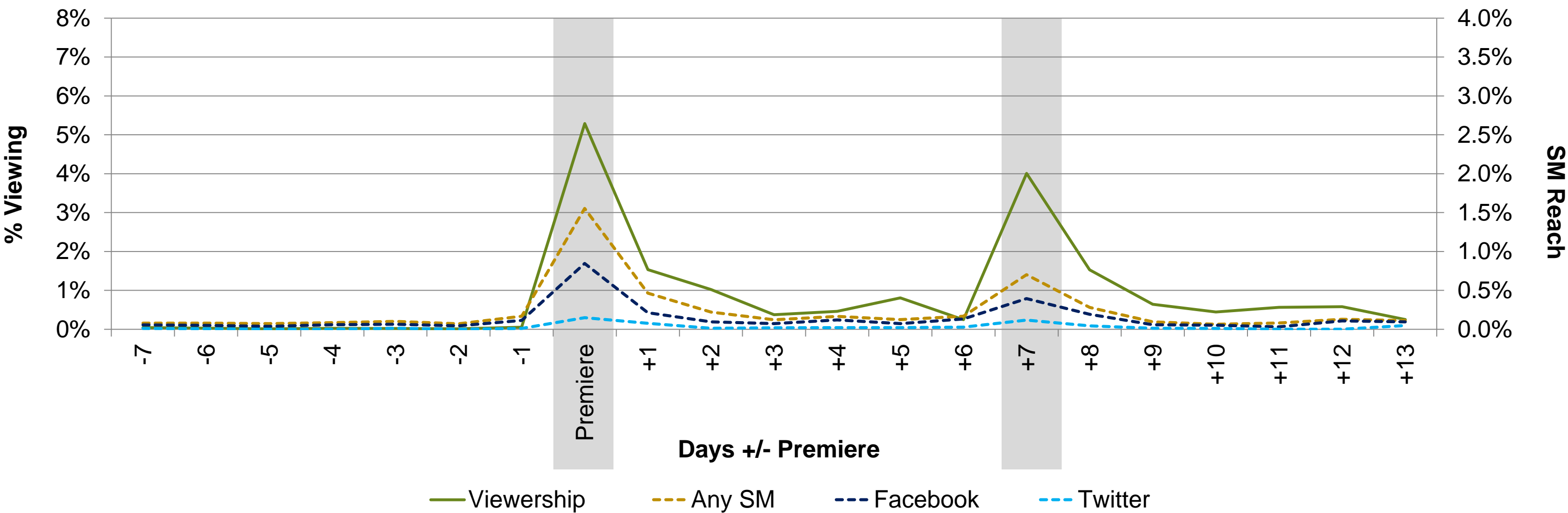
## SM PEAKS AT NEW SHOWS' PREMIERES

### AVERAGE REACH FOR NEWLY PREMIERING SHOWS

**Note:**  
Scale has changed  
from previous slide

*N=20 Newly Premiering Shows*

**Note:**  
SM items shown on a  
different scale.





# DAILY TV-RELATED SM REACH

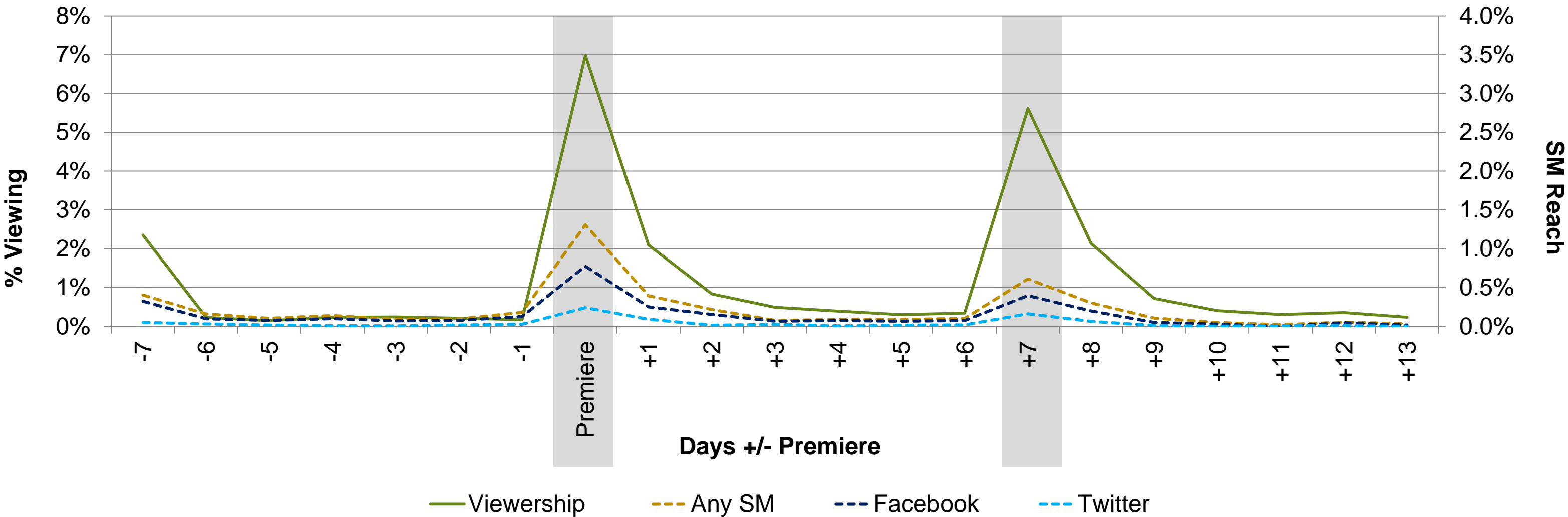
## SM PATTERN CONSISTENT FOR RETURNING SHOWS

### AVERAGE REACH FOR RETURNING SHOWS

**Note:**  
Scale has changed  
from previous slide

*N=20 Returning Shows*

**Note:**  
SM items shown on a  
different scale.





SECTION FOUR  
**SUPER CONNECTORS**

---

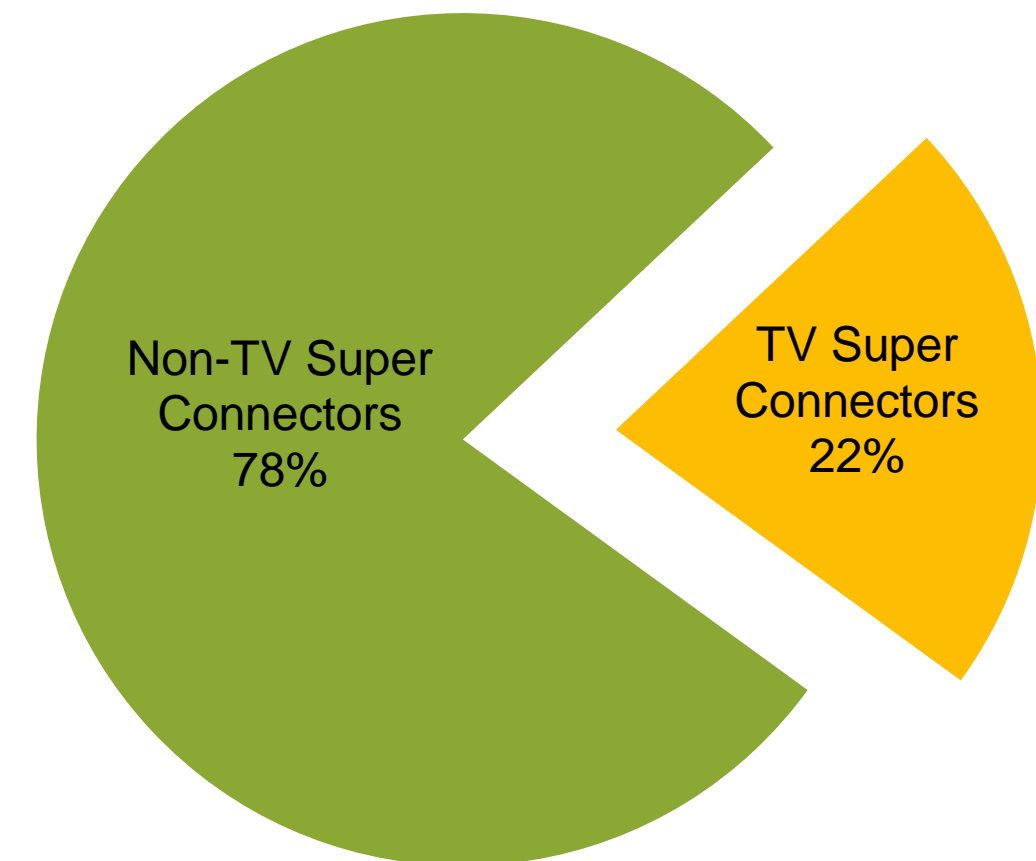


# TV SUPER CONNECTORS

TV Super Connectors must do any of the following “several times a day”

- > Following TV shows on social media,
- > Following actors/personalities on social media, or
- > Communicating about TV characters on social media.

% OF RESPONDENTS

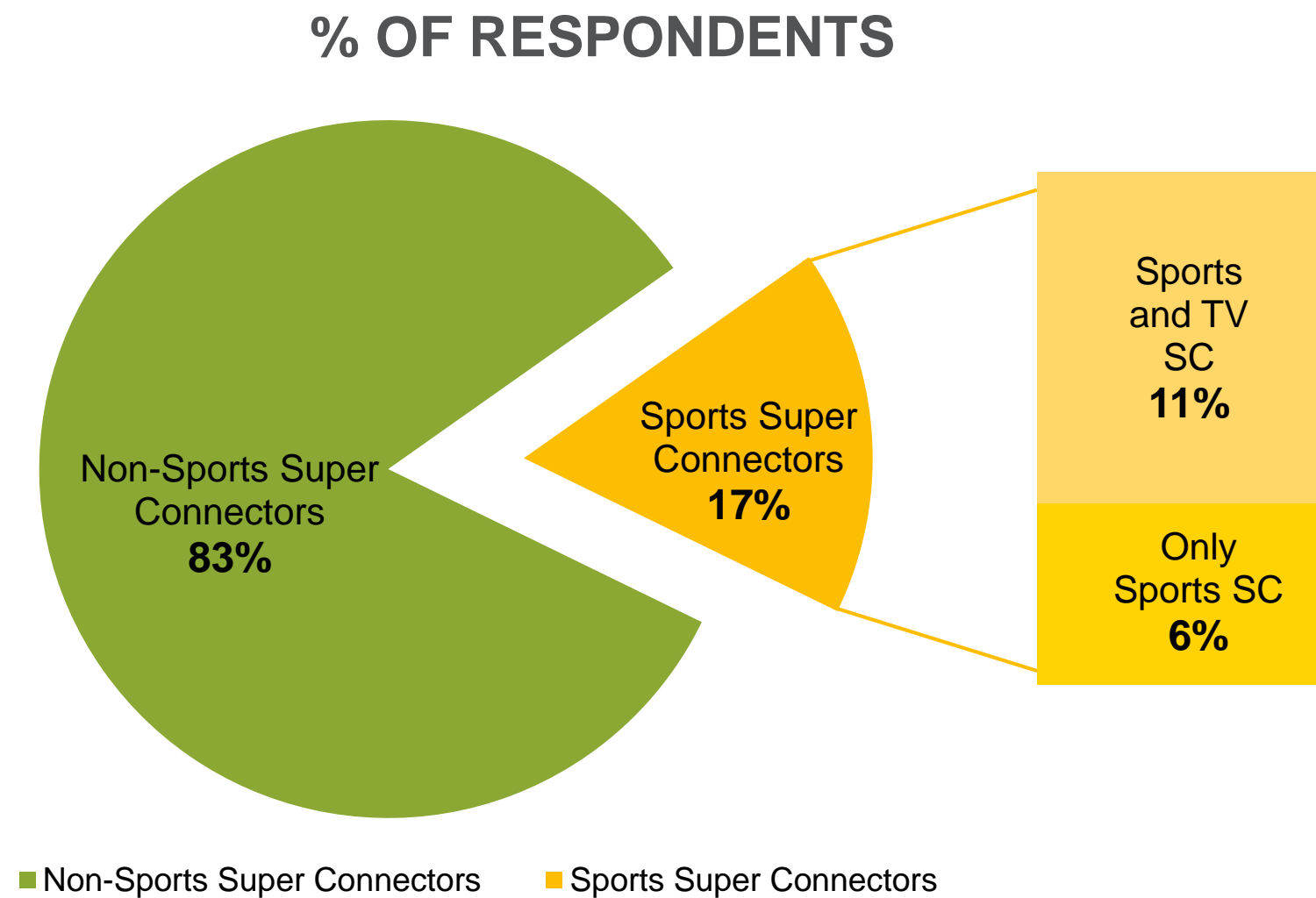


# WE ALSO MEASURED SPORTS SUPER CONNECTORS

Sports Super Connectors must do any of the following “several times a day”

- Following sports on social media, or
- Communicating about sports on social media.

Majority of Sports SC's are also TV Super Connectors

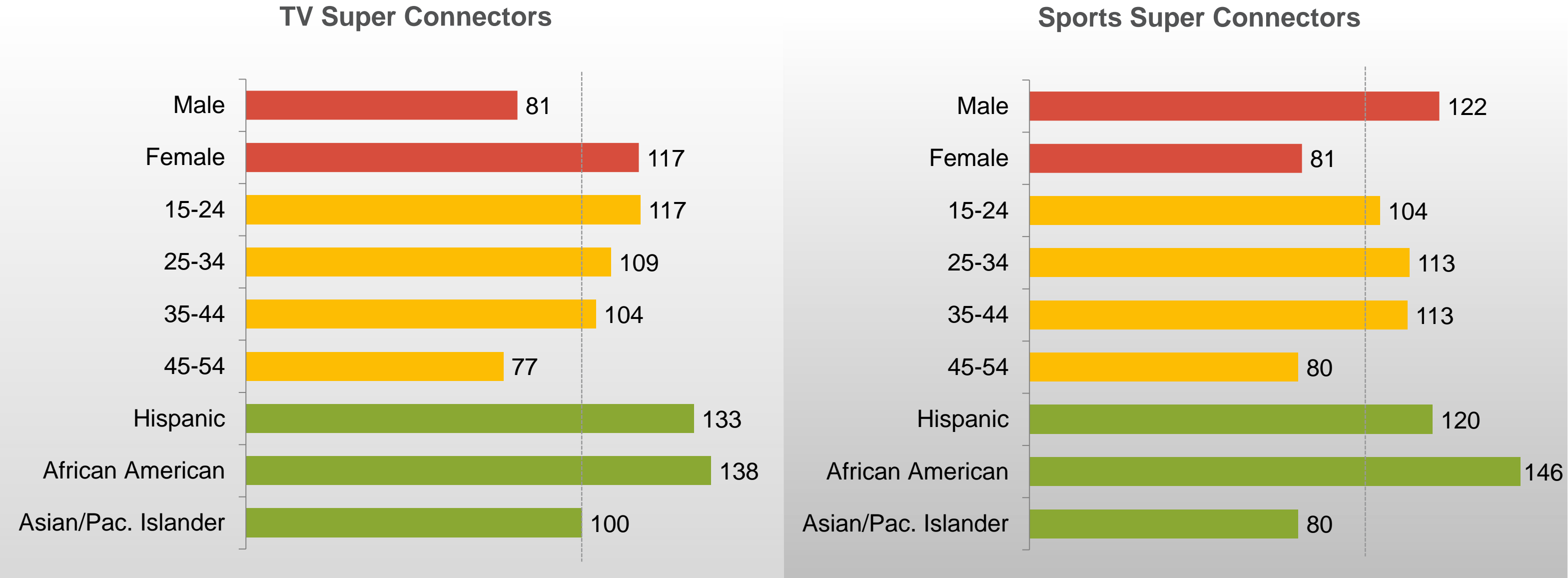


# SUPER CONNECTORS

## TV SC'S SKEW FEMALE, SPORTS SC'S SKEW MALE; MULTICULTURAL ABOVE AVERAGE FOR BOTH

### SUPER CONNECTOR DEMOGRAPHICS

*Indexed to Total Sample*

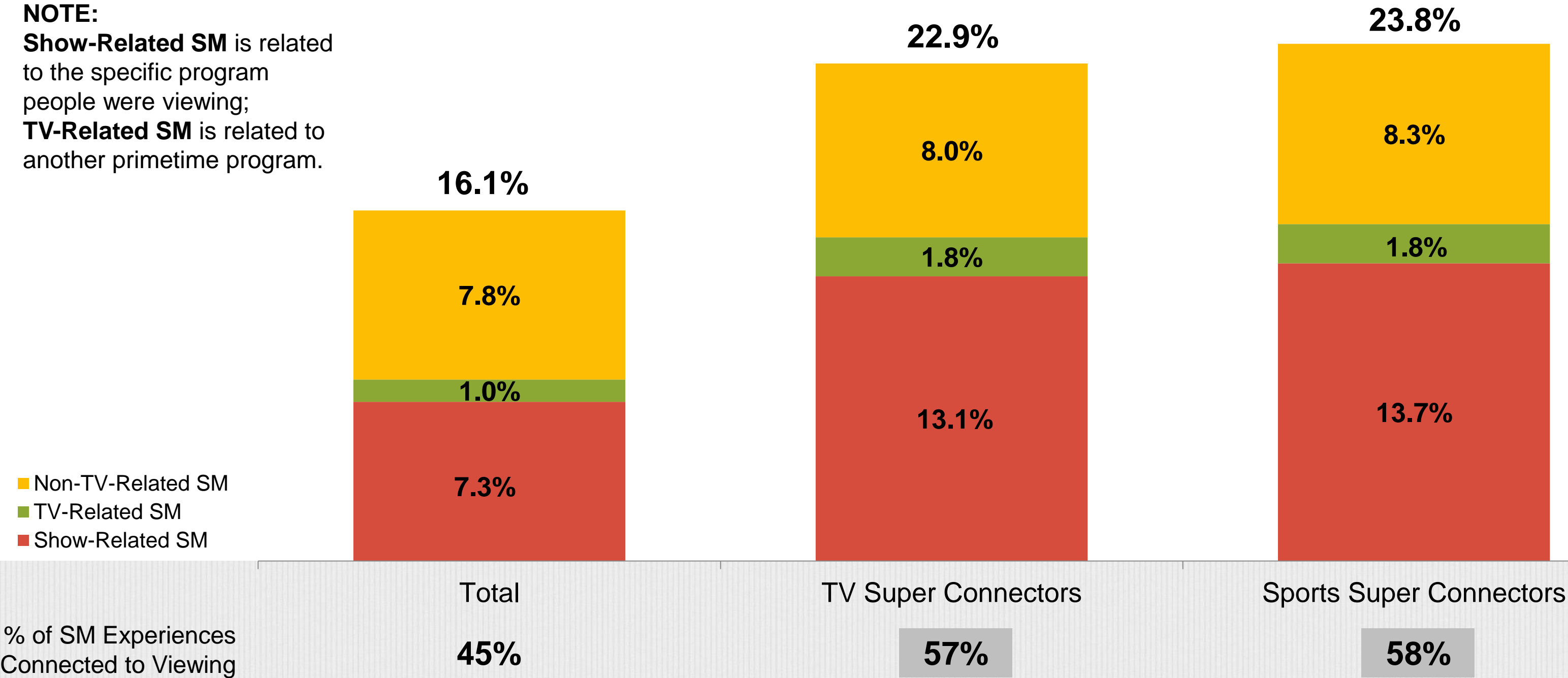




# SUPER CONNECTORS ENGAGE IN MORE SM ACTIVITY & MORE OF IT IS RELATED TO TV

## VIEWING INSTANCES INVOLVING SM

**NOTE:**  
**Show-Related SM** is related to the specific program people were viewing;  
**TV-Related SM** is related to another primetime program.





# SUPER CONNECTOR SOCIAL MEDIA USE WHILE WATCHING TV, BY SOCIAL NETWORK

## VIEWING INSTANCES INVOLVING FACEBOOK OR TWITTER

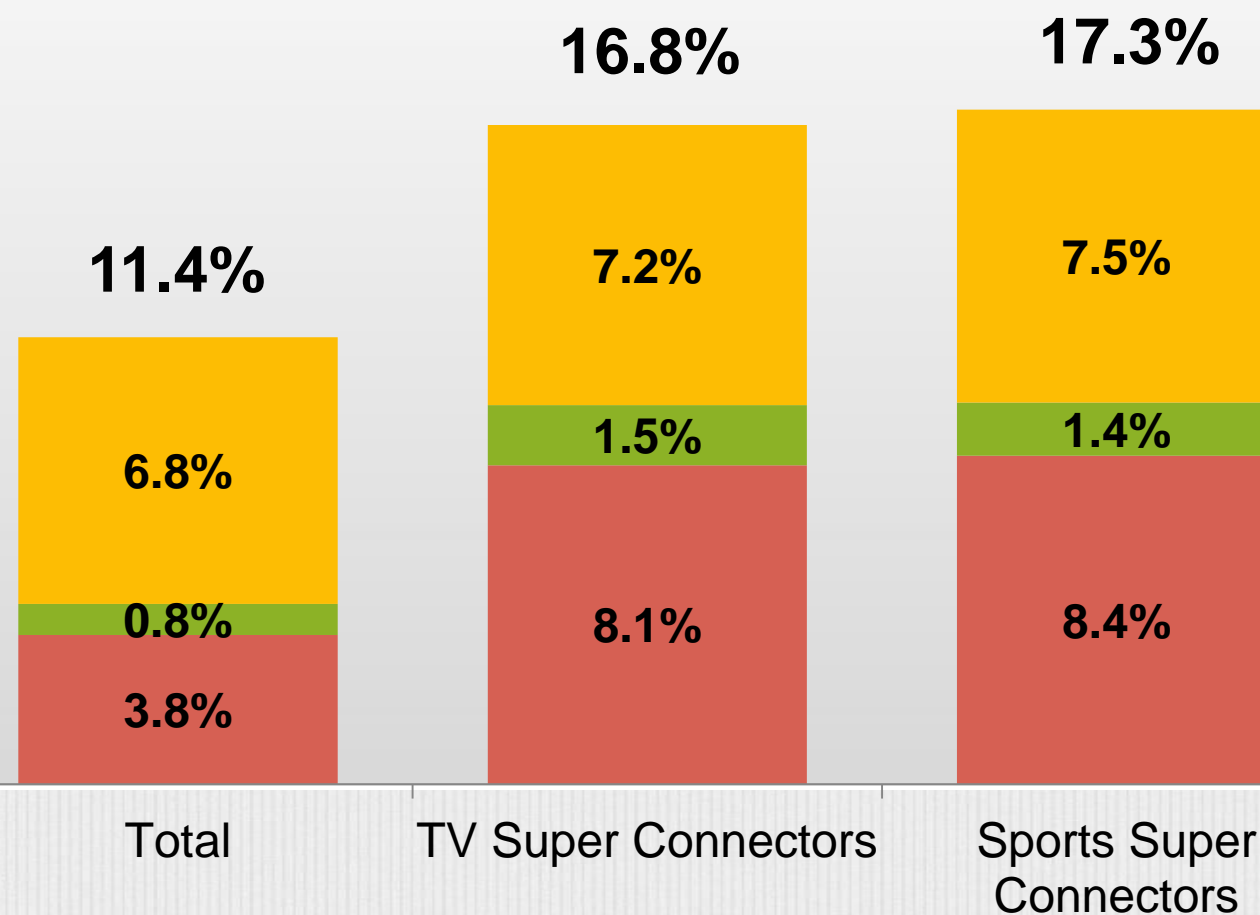
### NOTE

**Show-Related SM** is related to the specific program people were viewing;  
**TV-Related SM** is related to another primetime program.

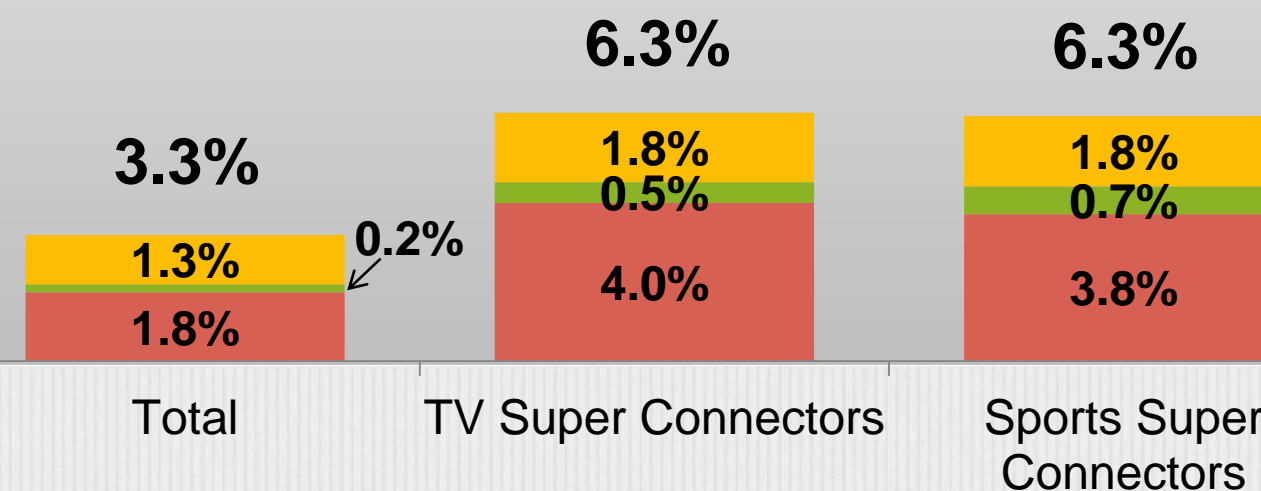


### FACEBOOK

- Non-TV-Related SM
- TV-Related SM
- Show-Related SM



### TWITTER



% of SM Experiences  
Connected to Viewing

33%

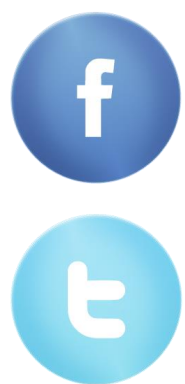
48%

49%

55%

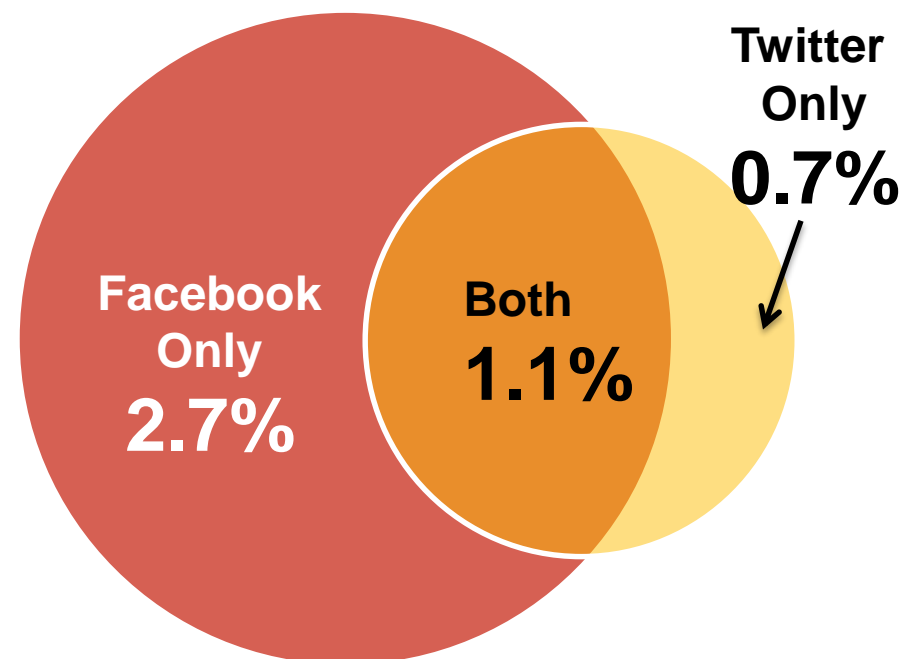
63%

60%

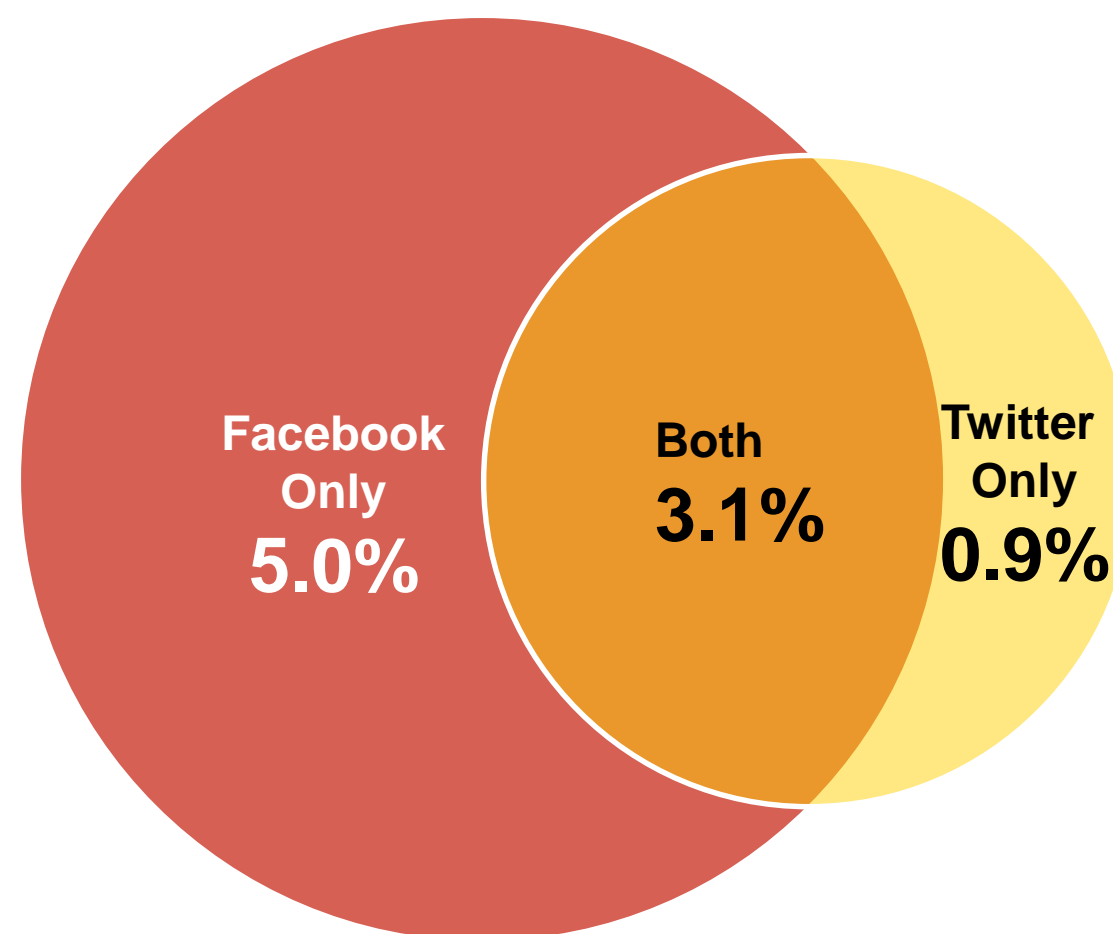


# USE OF FACEBOOK AND TWITTER, WHILE WATCHING

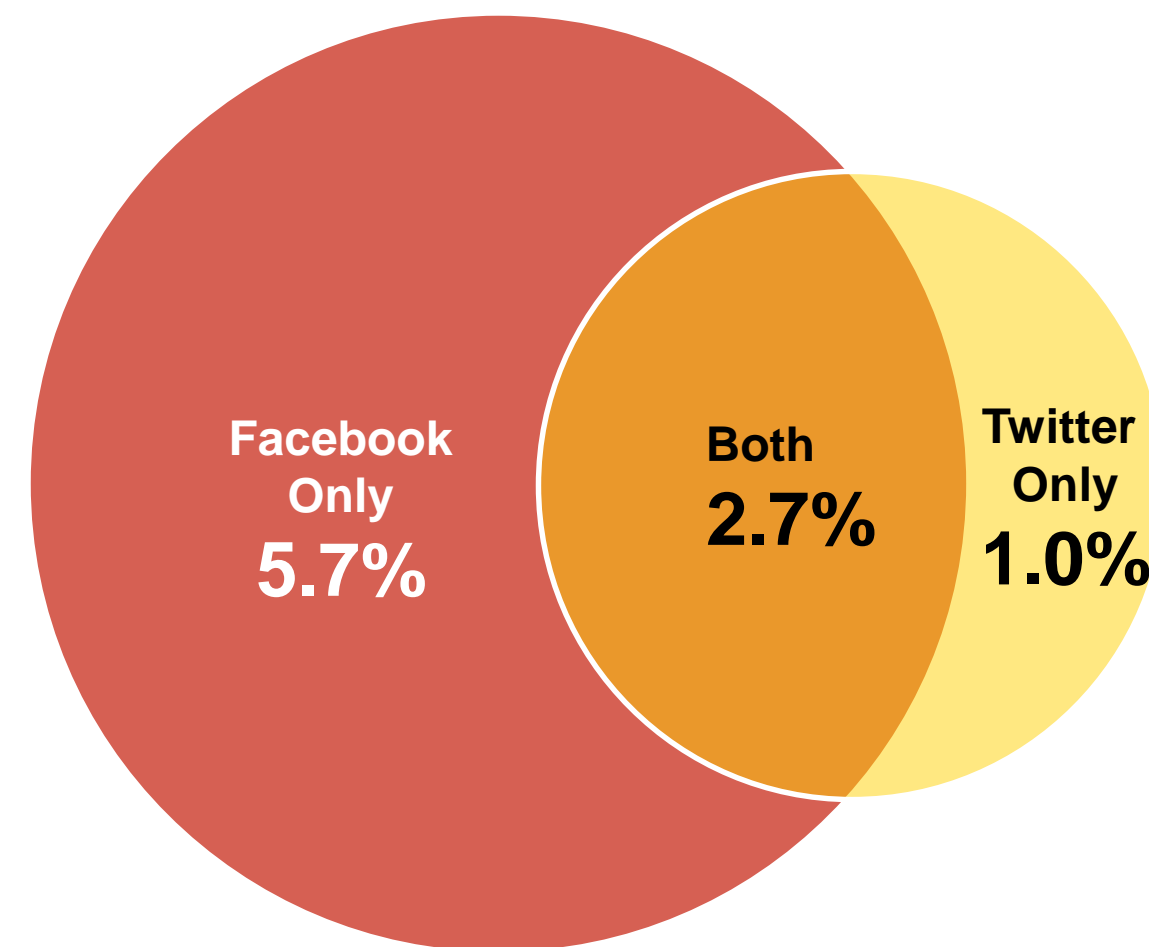
TOTAL SAMPLE



TV SUPERCONNECTORS



SPORTS SUPERCONNECTORS





SECTION FIVE

# **TIME SHIFTING, DEVICE USAGE, AND BINGE VIEWING**

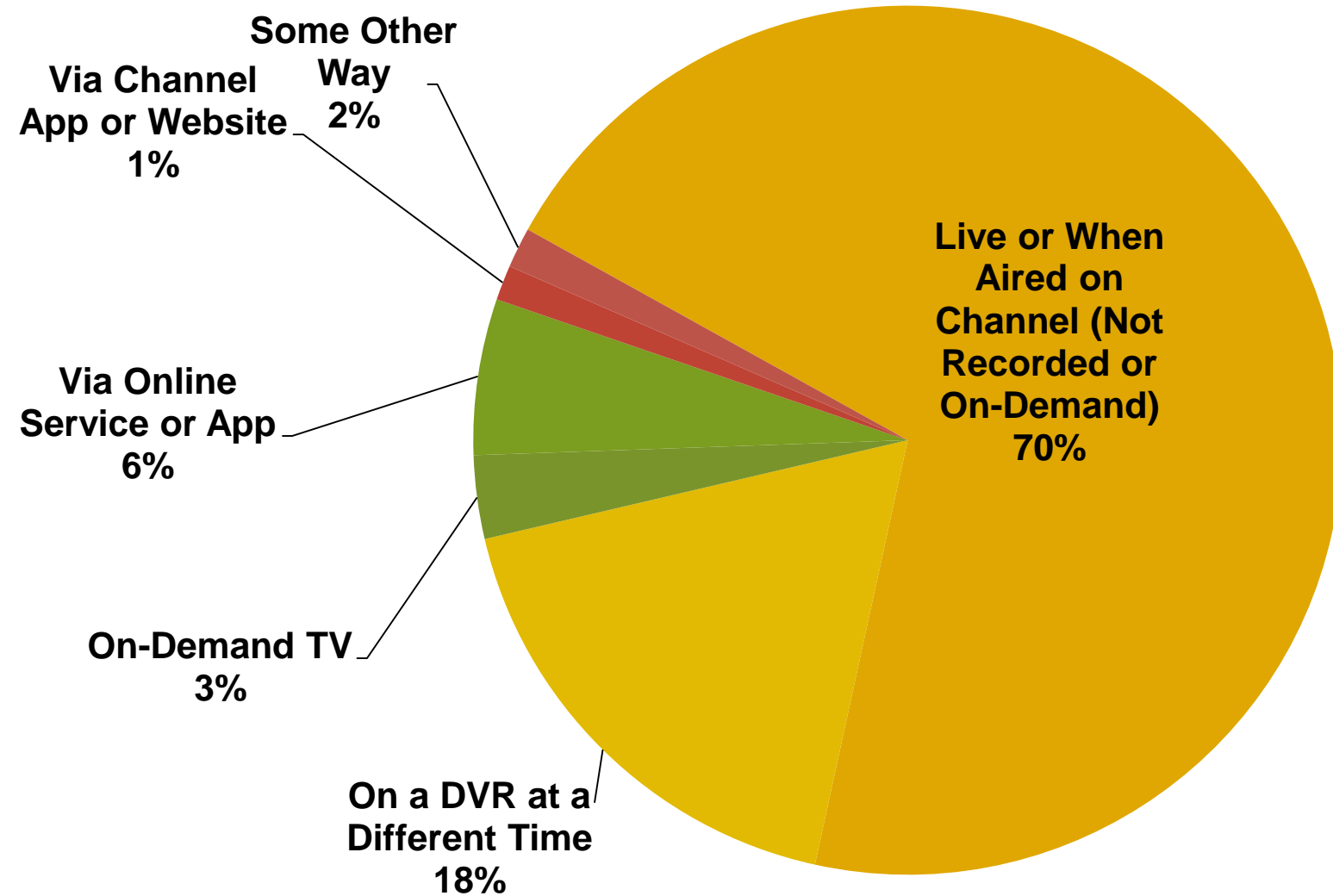




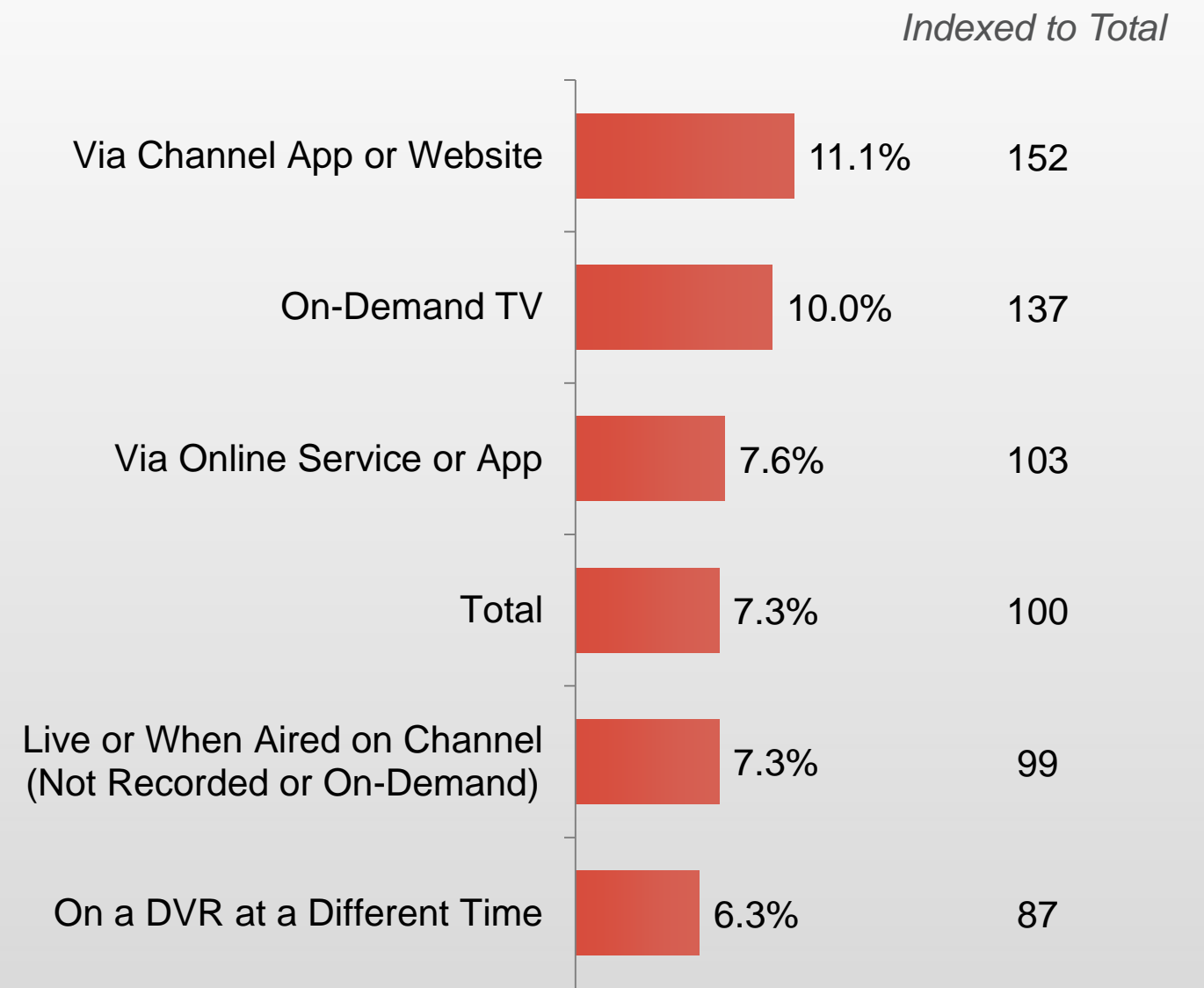


# TIME SHIFTING MAJORITY OF VIEWING IS LIVE; SOCIAL MEDIA MOST LINKED TO DIGITAL & ON-DEMAND VIEWING

## HOW VIEWED



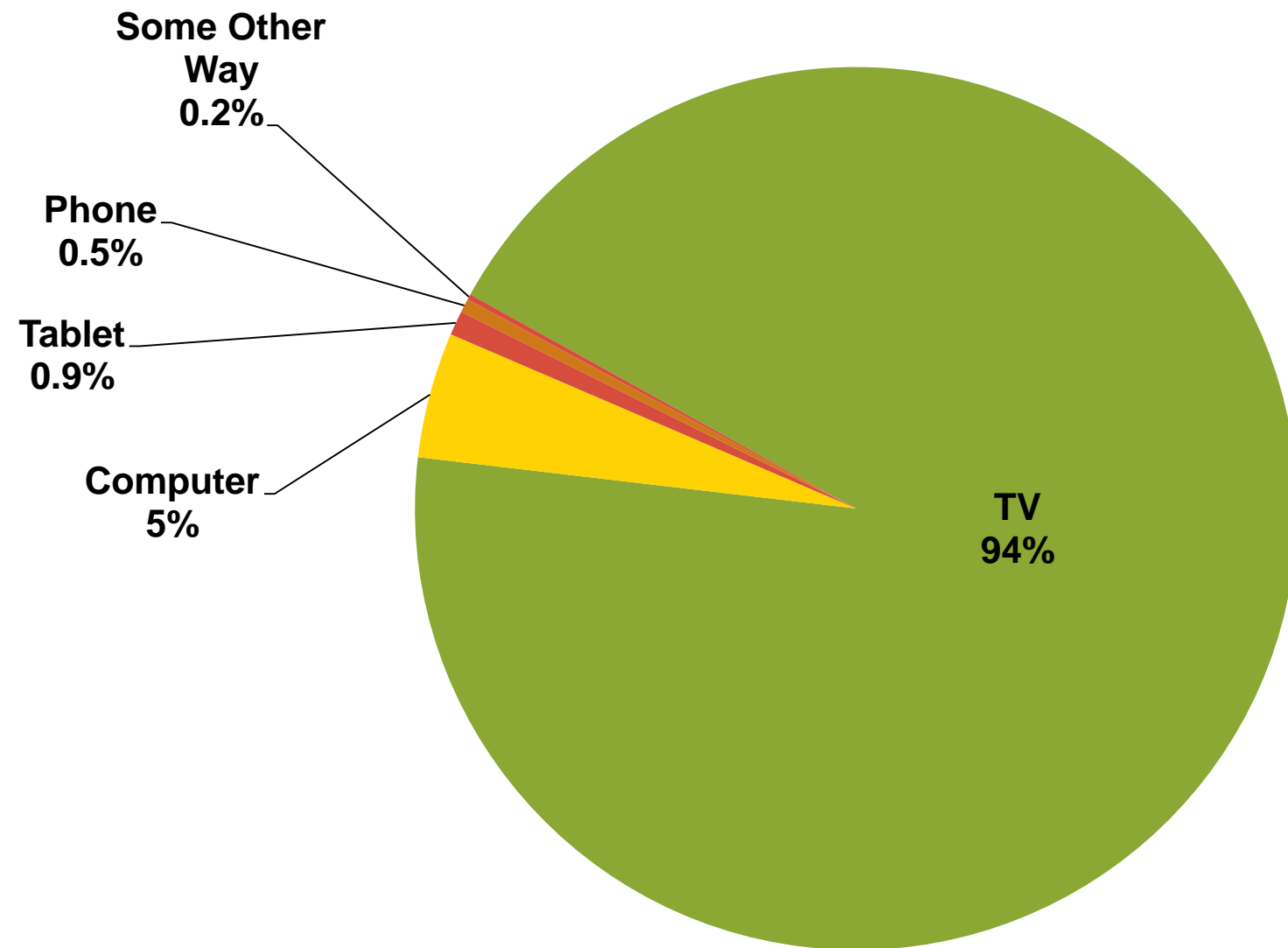
## SOCIALLY CONNECTED VIEWING, BY MODE



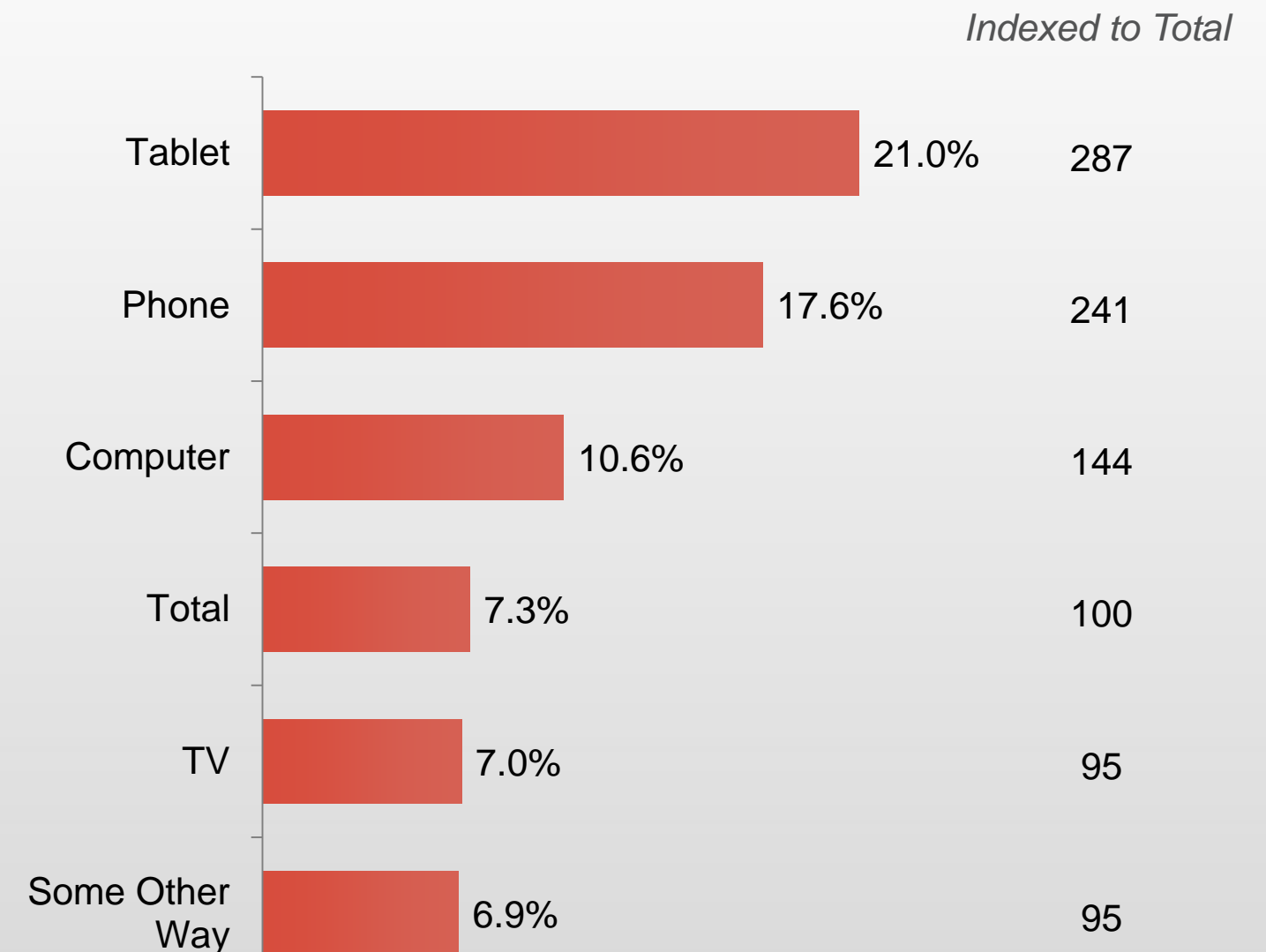


# SECOND SCREENS MAJORITY OF VIEWING HAPPENS VIA TV... HOWEVER, SM INFLUENCE CLOSELY LINKED TO VIEWING ON NON-TRADITIONAL SCREENS

SCREEN USED  
TO VIEW



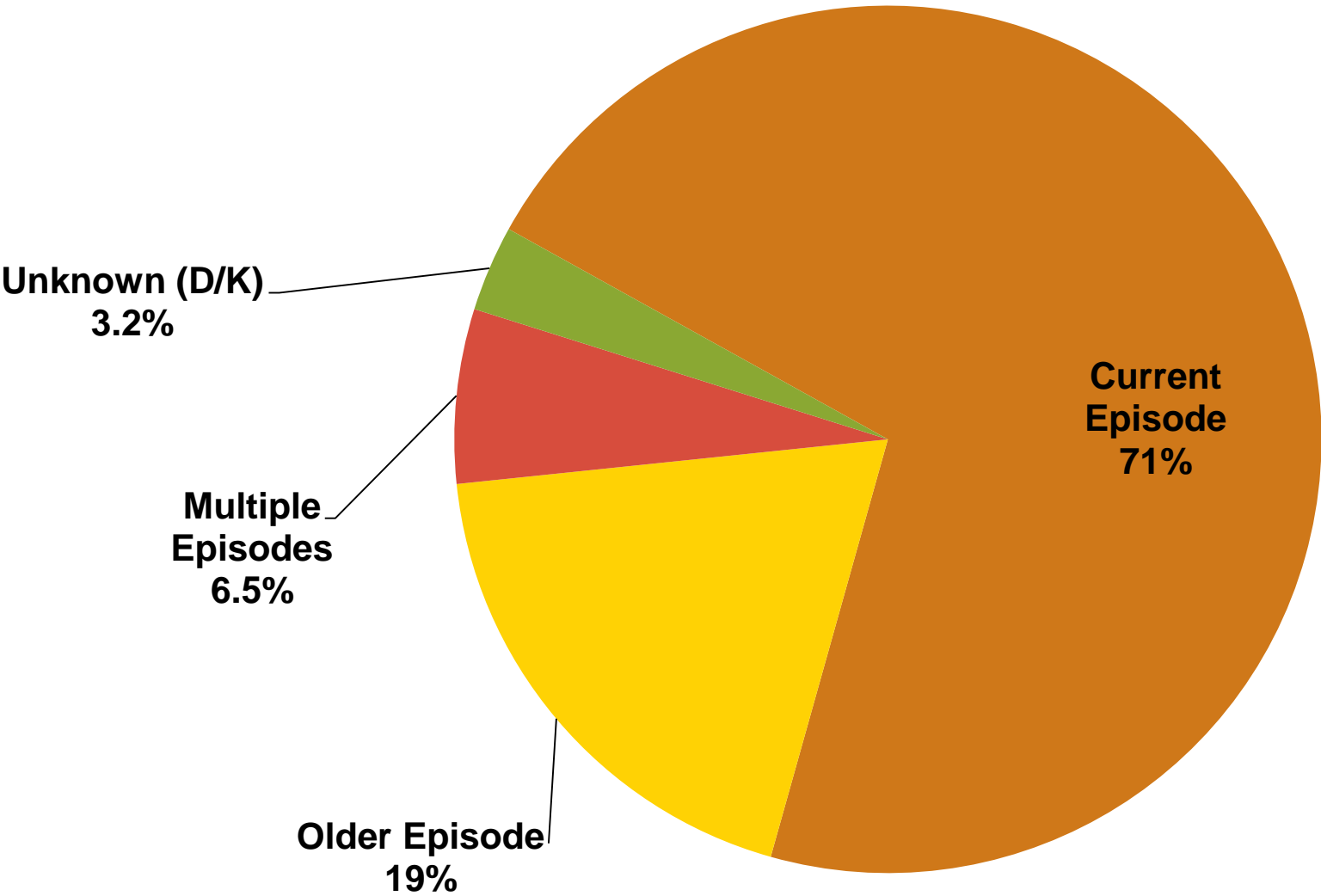
SOCIALLY CONNECTED VIEWING,  
BY SCREENS VIEWED



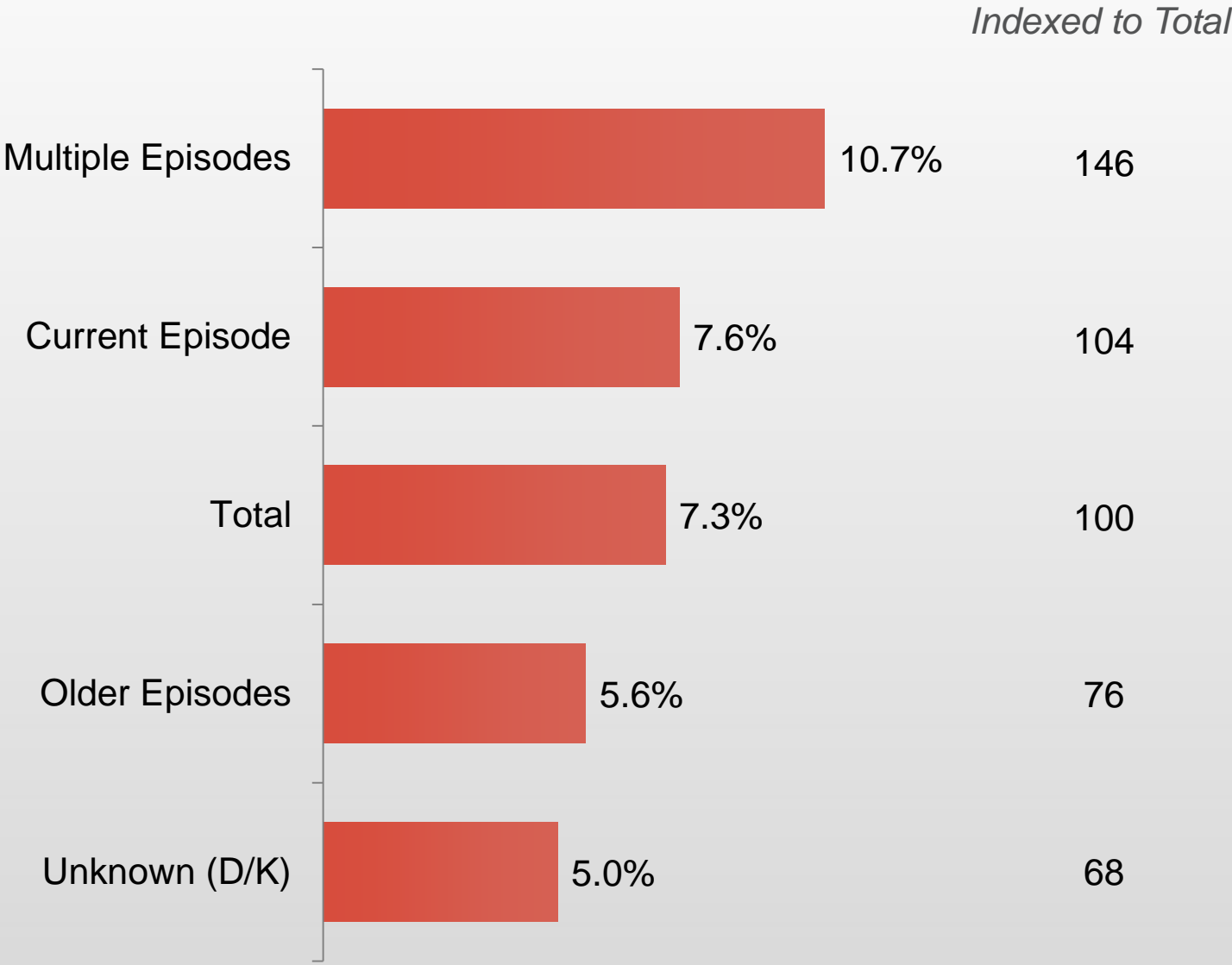


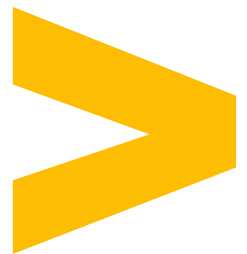
# EPISODES VIEWED MOST RESPONDENTS VIEW CURRENT EPISODES... BUT BINGE-WATCHING MOST INFLUENCED BY SOCIAL MEDIA

**EPISODE(S) VIEWED**  
*Respondent Reported*



**SOCIALLY CONNECTED VIEWING,  
BY EPISODE(S) VIEWED**





SUMMARY  
**KEY FINDINGS**

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# KEY FINDINGS

## PREVALENCE OF SOCIAL TV

### Daily social media use during or regarding primetime TV at 19%.

- > Roughly half of SM use re TV occurs while viewing primetime shows, and half while not viewing.
- > While viewing, just under half of SM use is about TV, mostly about the show specifically, while the other half is unrelated to TV.
- > Thus, **7.3%** of viewing instances are socially connected.

### Traditional touch points still more important than SM use about TV.

- > TV promos drive more viewing than social media, according to self-report.
- > Promos drive 40% of decisions to view newly premiering shows, vs. 7% for social media.
- > For premieres of returning shows, only 3% watch because of social media.

# KEY FINDINGS

## WHERE SOCIAL TV IS STRONGEST



**Social media usage related to TV skews female, younger and Hispanic.**



**Hispanics & 15-34s most likely to engage in Social TV.**

- > Hispanics stand out as the most engaged with Social TV across multiple metrics with indices of 130+.



**Socially connected viewing highest for:**

- > Specials, Sci Fi & Sports
- > New shows
- > Digital & on-demand viewing

# KEY FINDINGS

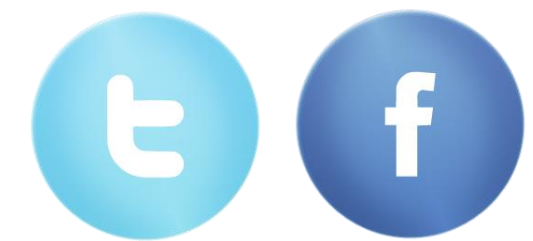
## SUPER CONNECTORS



**TV Super  
Connectors (22%)  
more likely female,  
younger &  
multicultural.**



**Sports Super  
Connectors (17%)  
more likely male,  
multicultural.**



**Super Connectors are more  
likely to engage in socially  
connected viewing**

**Higher levels of socially  
connected viewing by  
Super Connectors  
comes primarily from  
increased use of Facebook,  
or Facebook + Twitter.**





**THANK YOU!**





**KARTHIK RAO**

Media Analytics

Nielsen

