



TALKING SOCIAL TV 2

April 10, 2014



cre

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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





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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**



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



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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





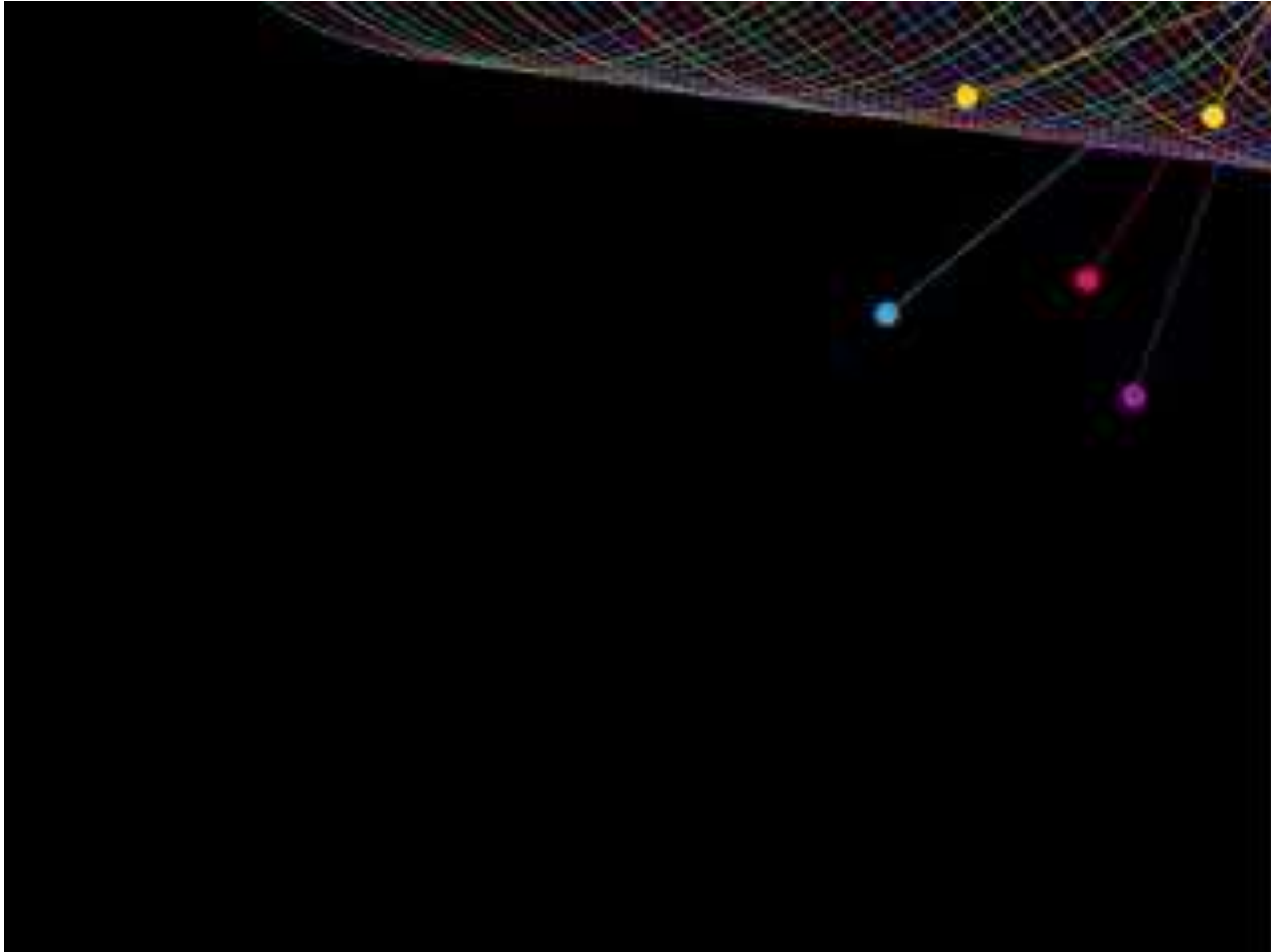
STUDY OVERVIEW

- > **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



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%

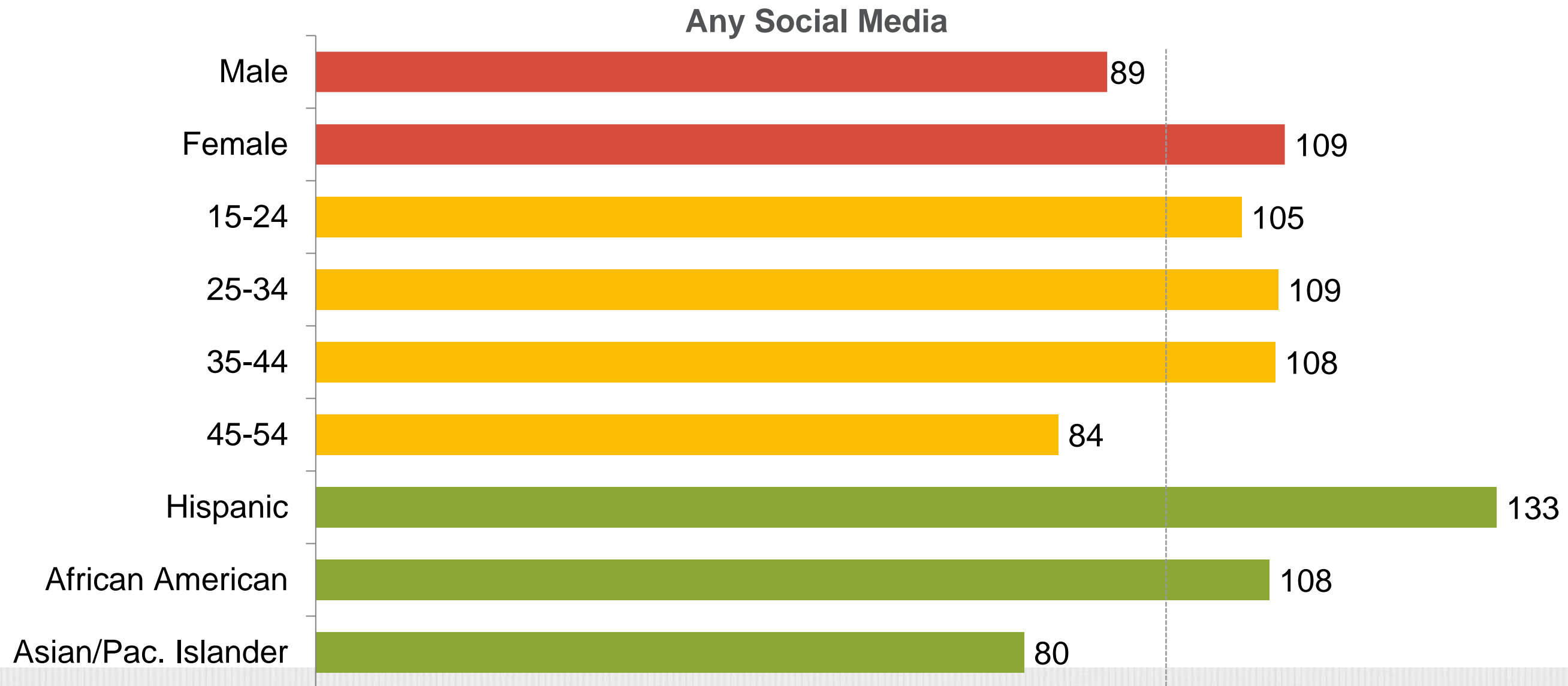


DAILY TV-RELATED SOCIAL MEDIA USAGE

SOCIAL TV REACH SKEWS FEMALE, HISPANIC

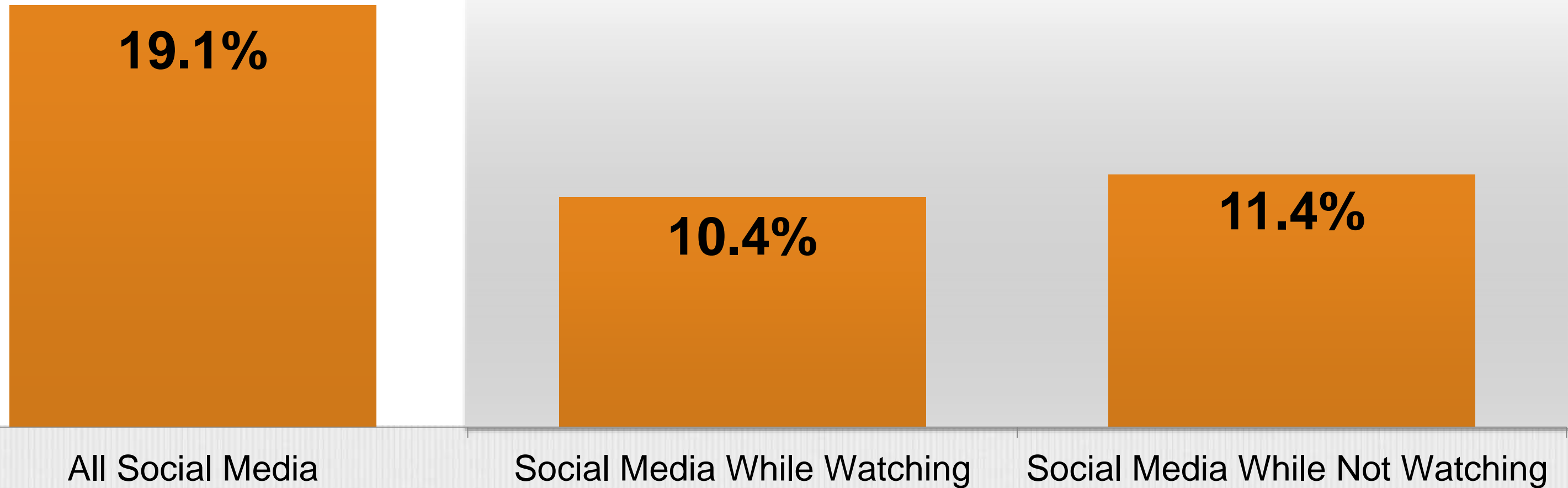
DAILY TV-RELATED SOCIAL MEDIA DEMOGRAPHICS

Indexed to Total Sample



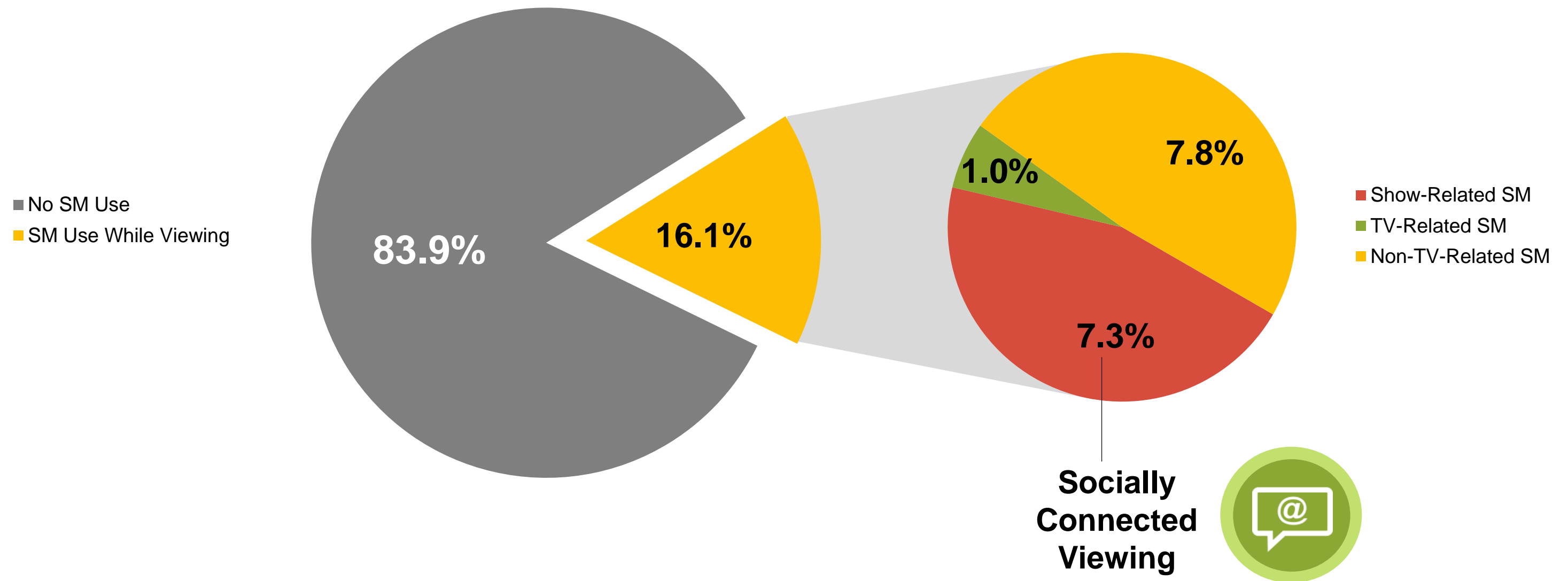
DAILY SM REACH: ~ EVENLY SPLIT BETWEEN WHILE VIEWING AND NOT VIEWING

AVERAGE DAILY SM REACH



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

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



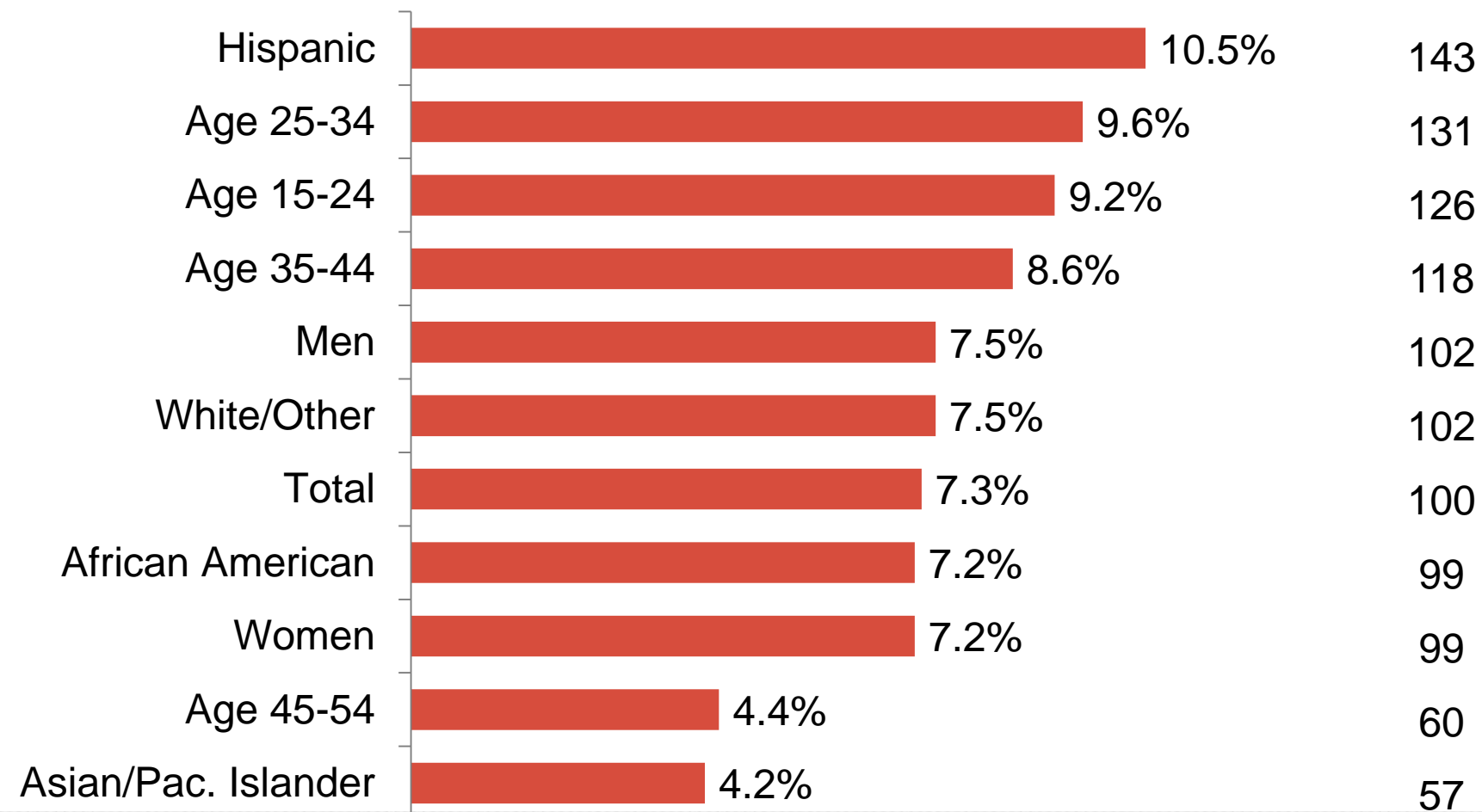
HISPANICS AND 15-34'S MOST LIKELY TO ENGAGE IN SOCIAL TV

DEMOGRAPHIC DIFFERENCES

Indexed to Total



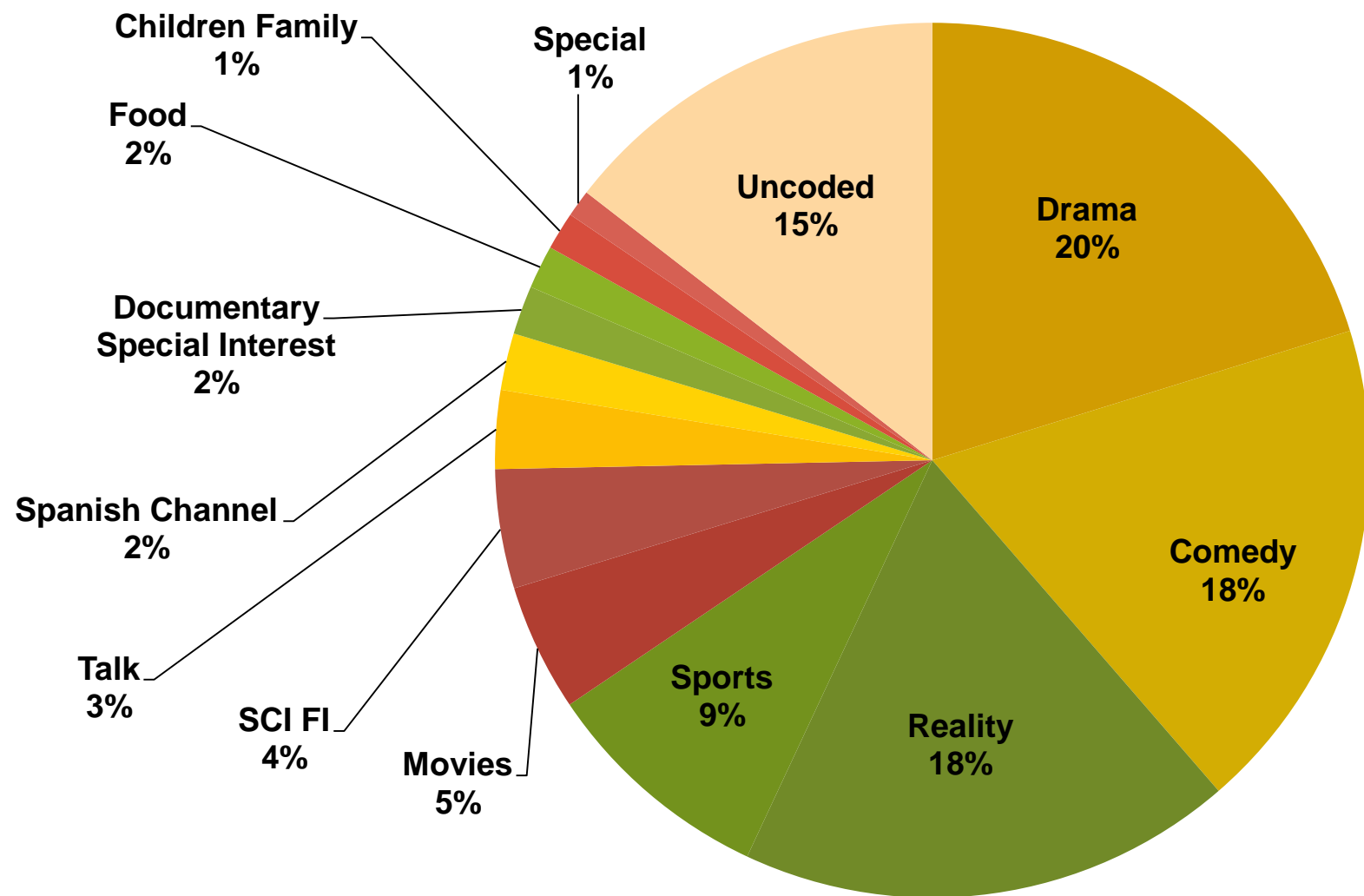
SOCIALLY CONNECTED VIEWING



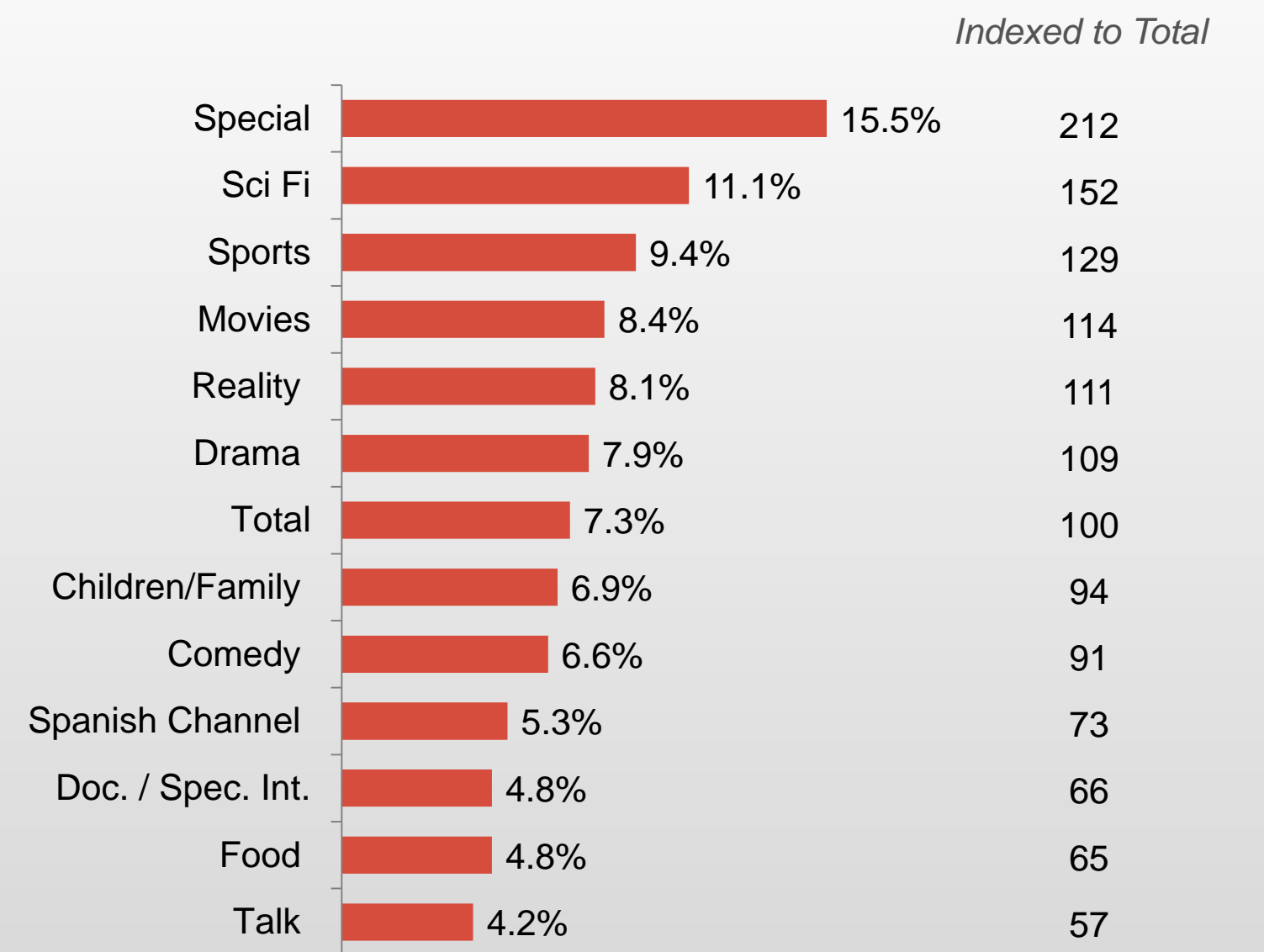


GENRES MOST INFLUENCED BY SM: SPECIALS, SCI-FI, SPORTS

% OF ALL GENRES VIEWED



SOCIALLY CONNECTED VIEWING, BY GENRE





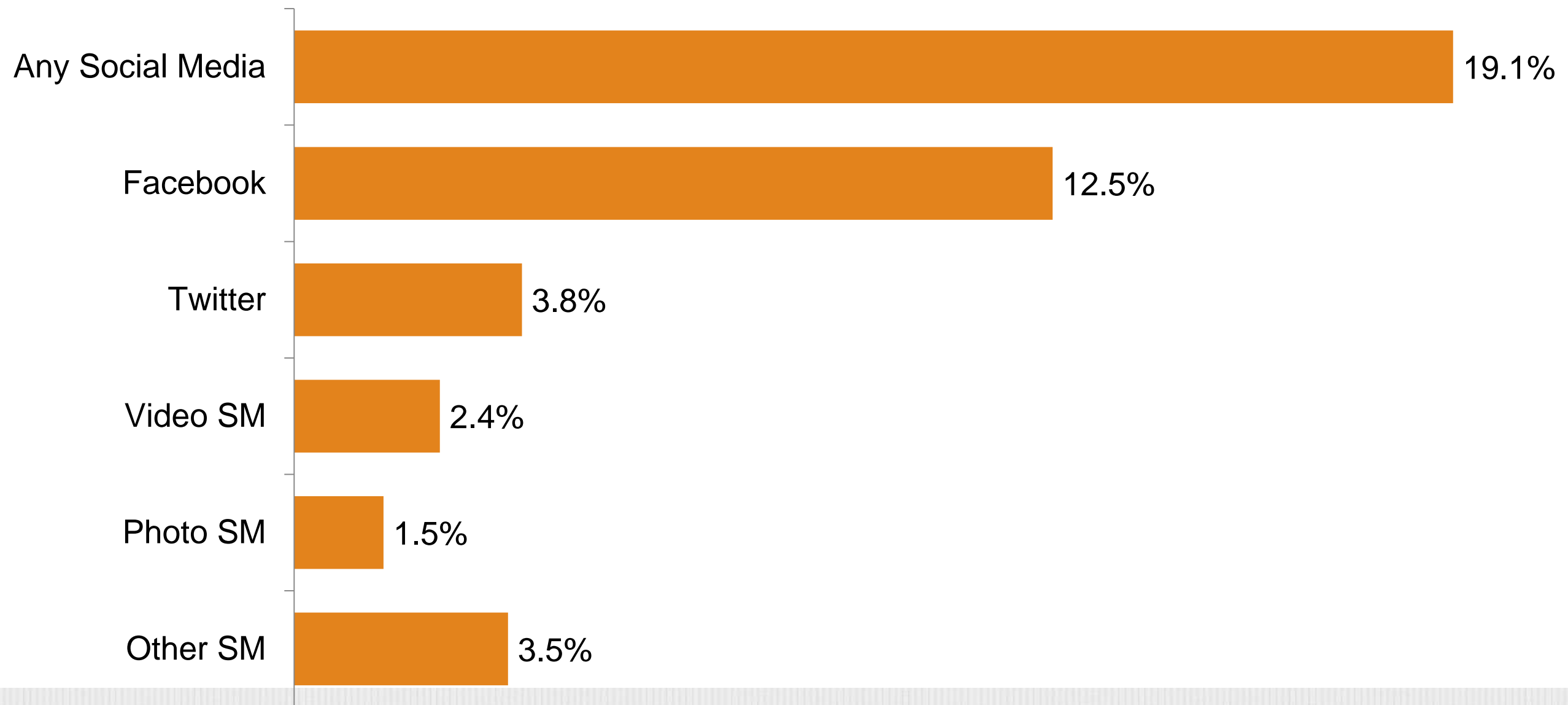
SECTION TWO
**SM USAGE BY
SOCIAL NETWORK**





DAILY TV-RELATED SOCIAL MEDIA USAGE, BY SOCIAL NETWORK

AVERAGE DAILY REACH





DAILY TV-RELATED SOCIAL MEDIA USAGE

FACEBOOK SKEWS FEMALE, HISPANIC

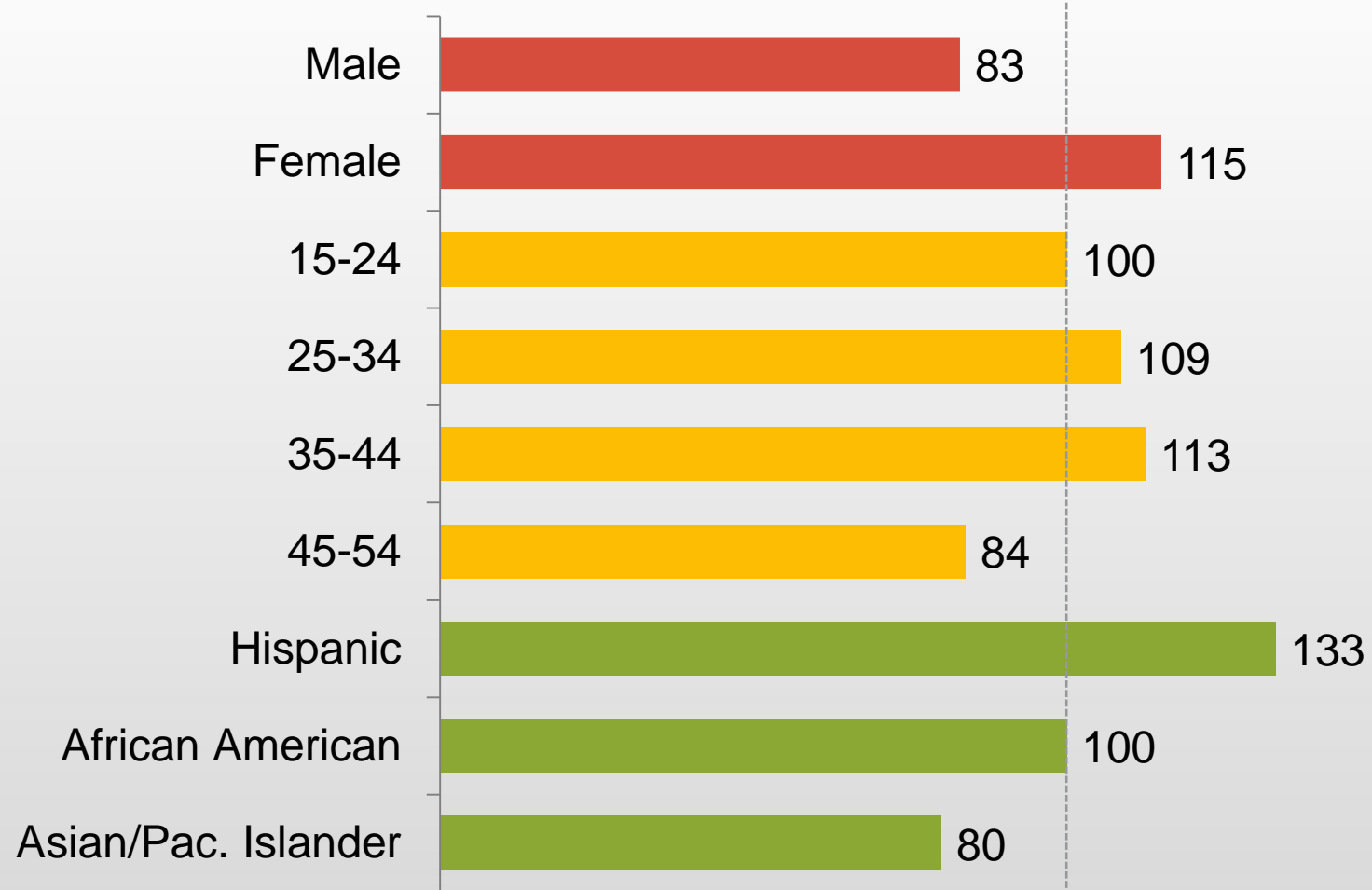


TWITTER SKEWS YOUNGER

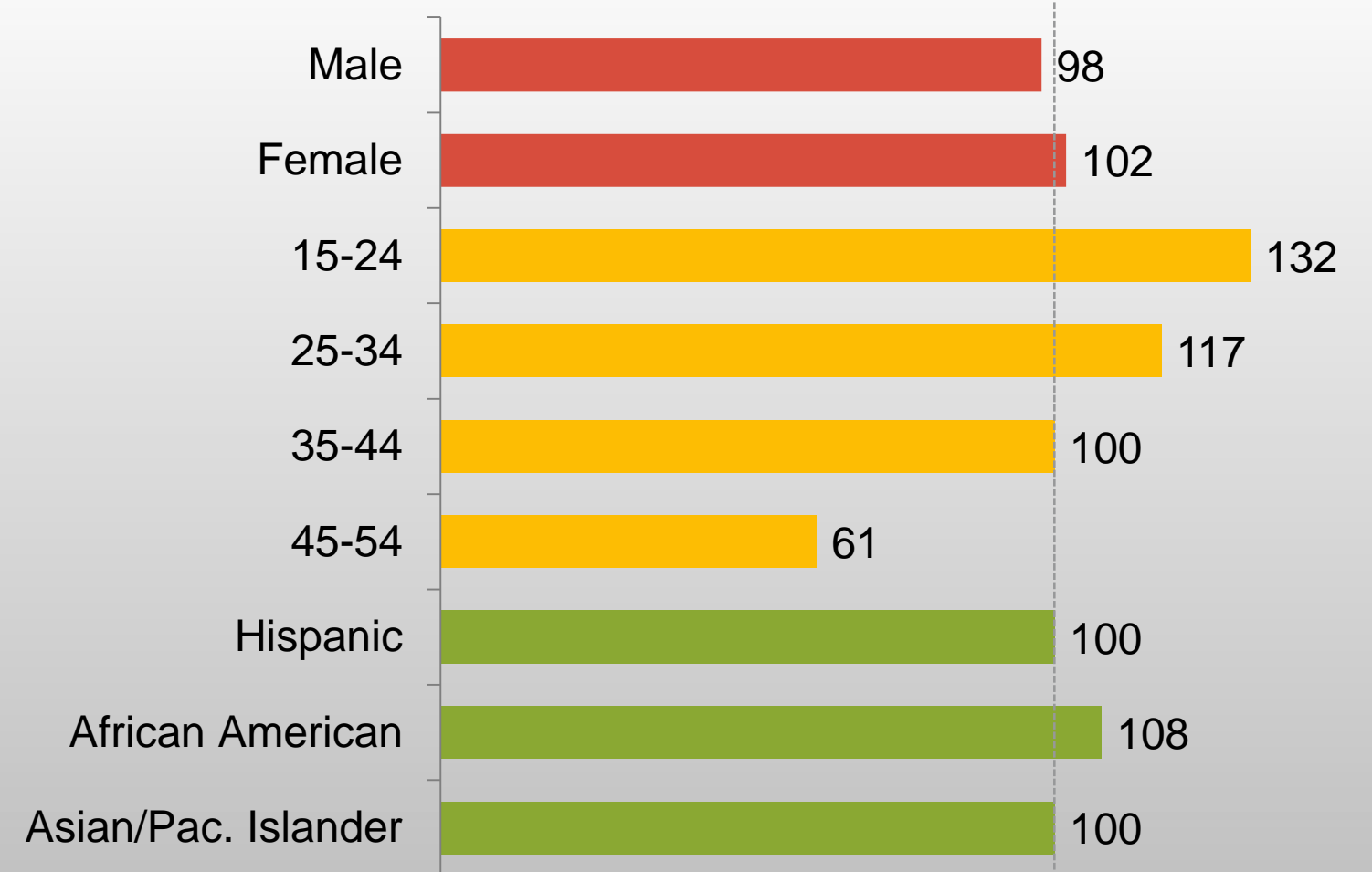
DAILY TV-RELATED SOCIAL MEDIA DEMOGRAPHICS

Indexed to Total Sample

Facebook



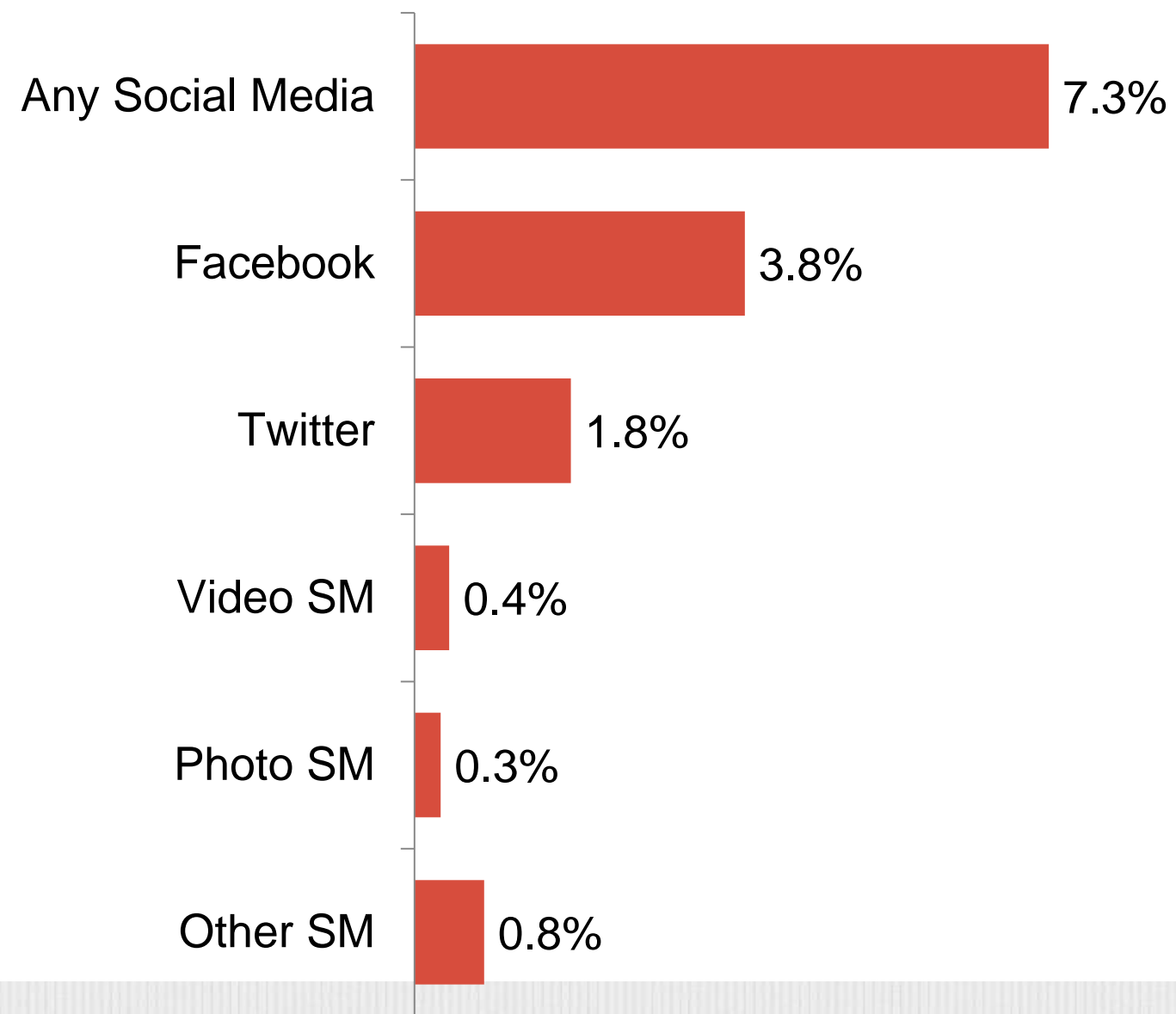
Twitter





SOCIALLY CONNECTED VIEWING BY SOCIAL NETWORK

SOCIALLY CONNECTED VIEWING



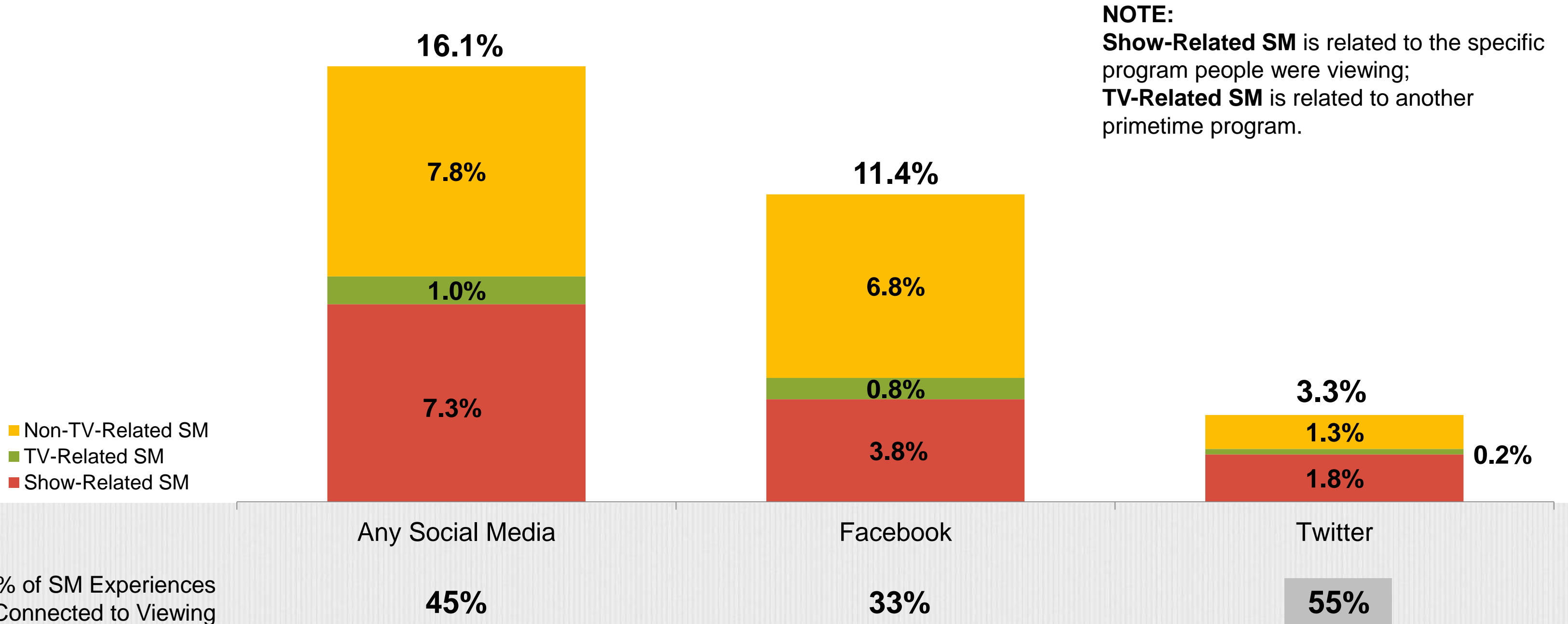


PROPORTION OF SM USE WHILE VIEWING RELATED TO TV, BY SOCIAL NETWORK

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**



DISCOVERING NEW SHOWS





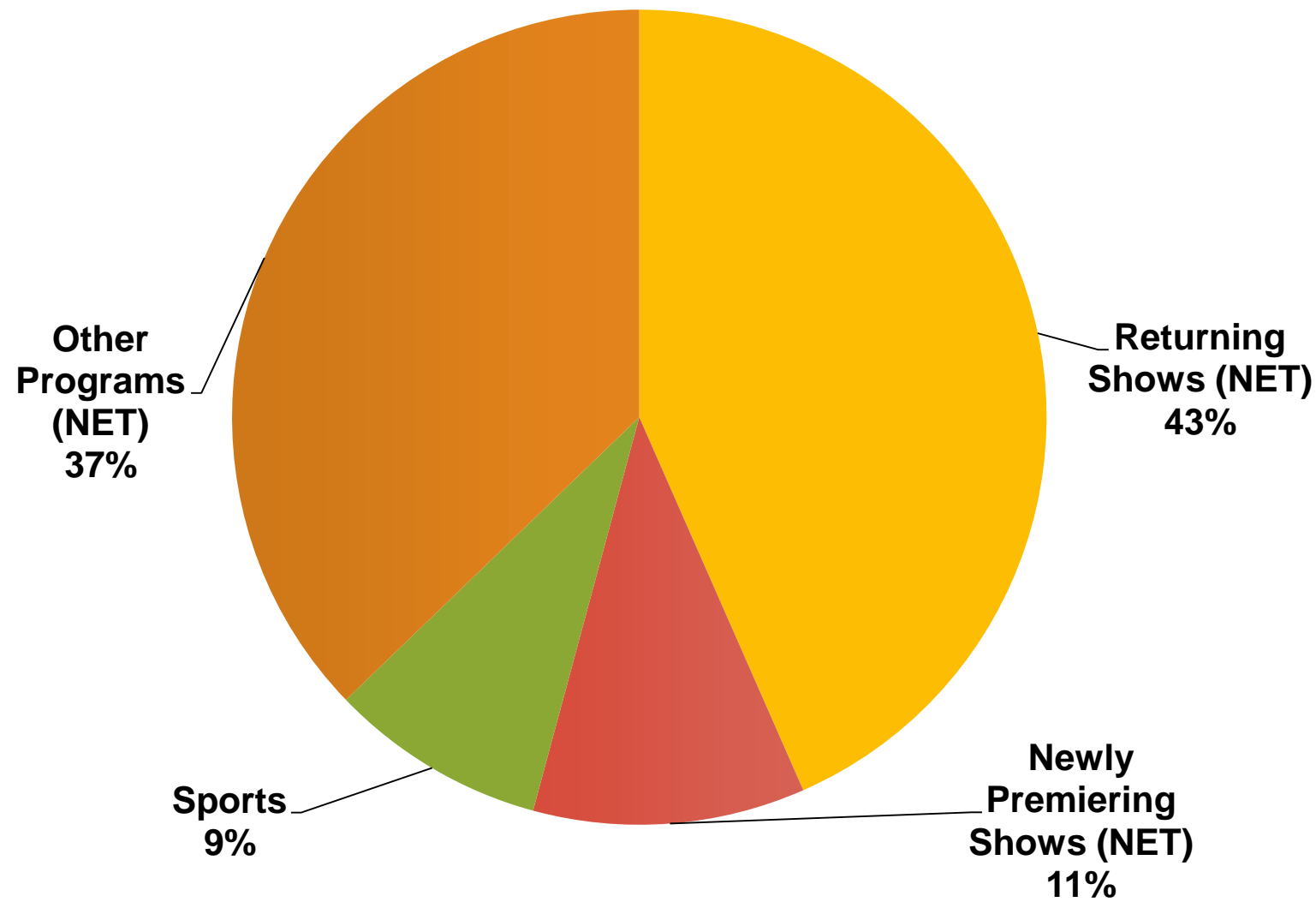
VIEWERS OF NEWLY PREMIERING SHOWS ARE THE MOST SOCIALLY CONNECTED

NOTE

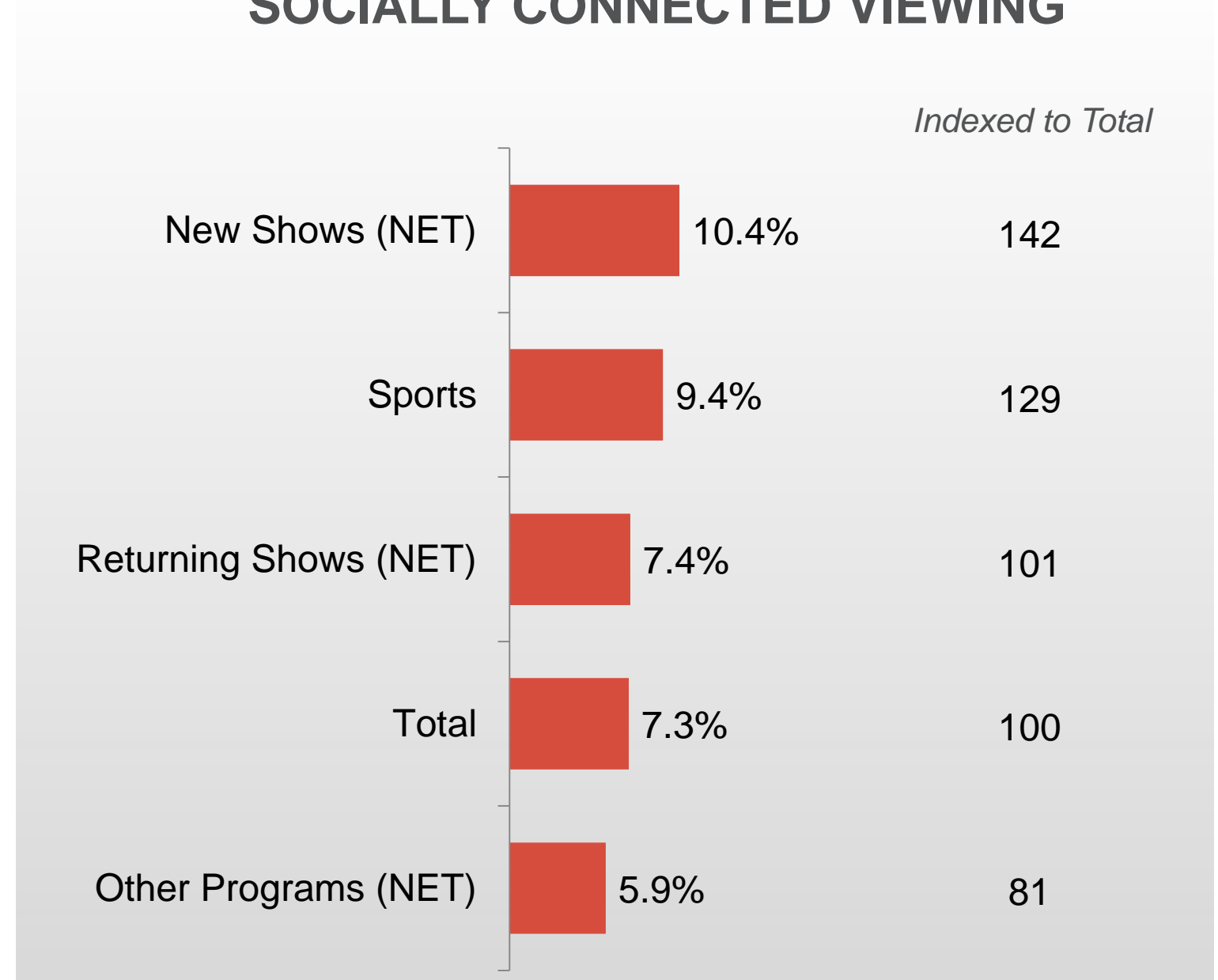
Returning shows are premiering new episodes in their 2+ season in the Fall of 2013.

Other Programs include re-runs, syndication, shows not starting their seasons in the Fall, etc.

% OF SHOWS VIEWED

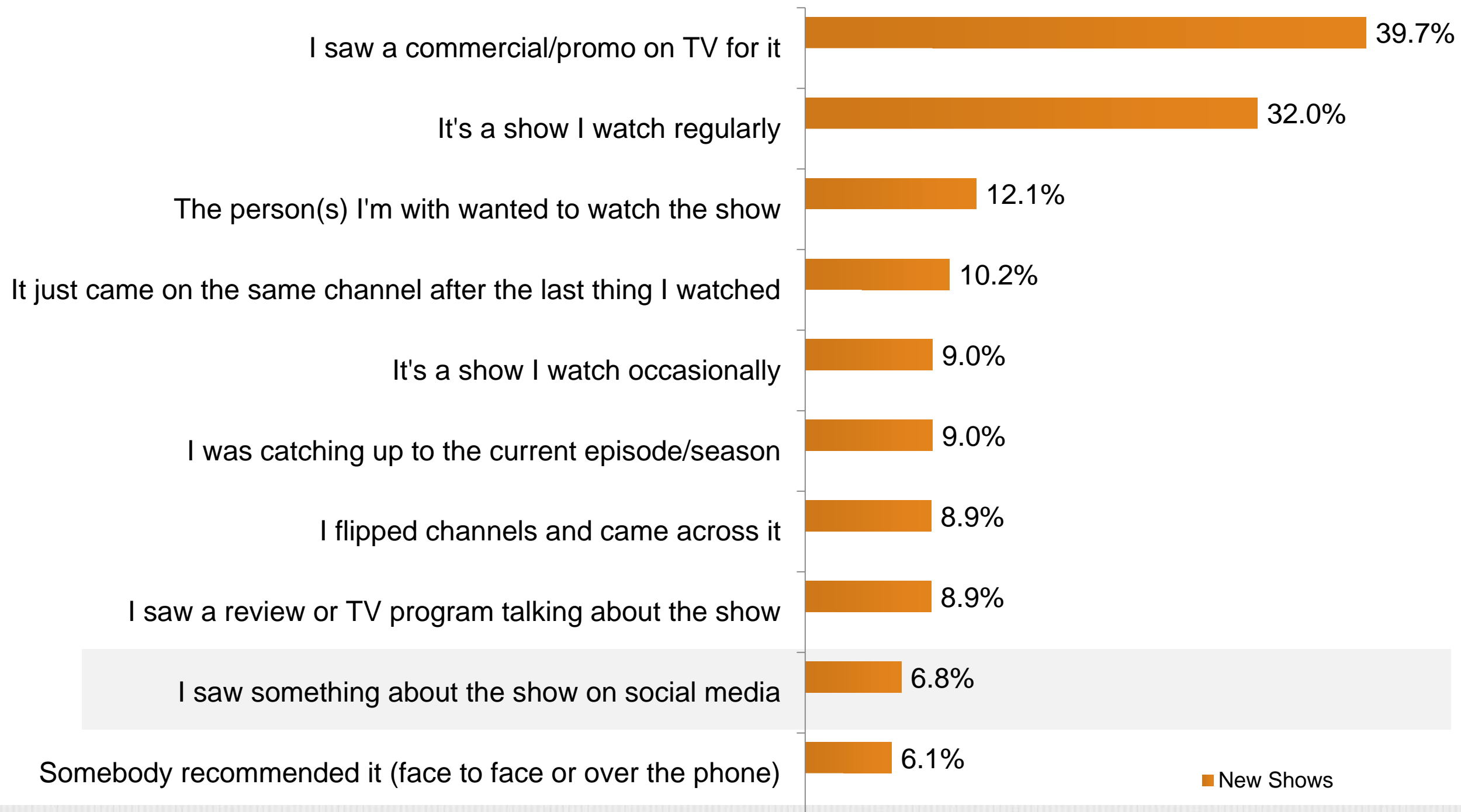


SOCIALLY CONNECTED VIEWING



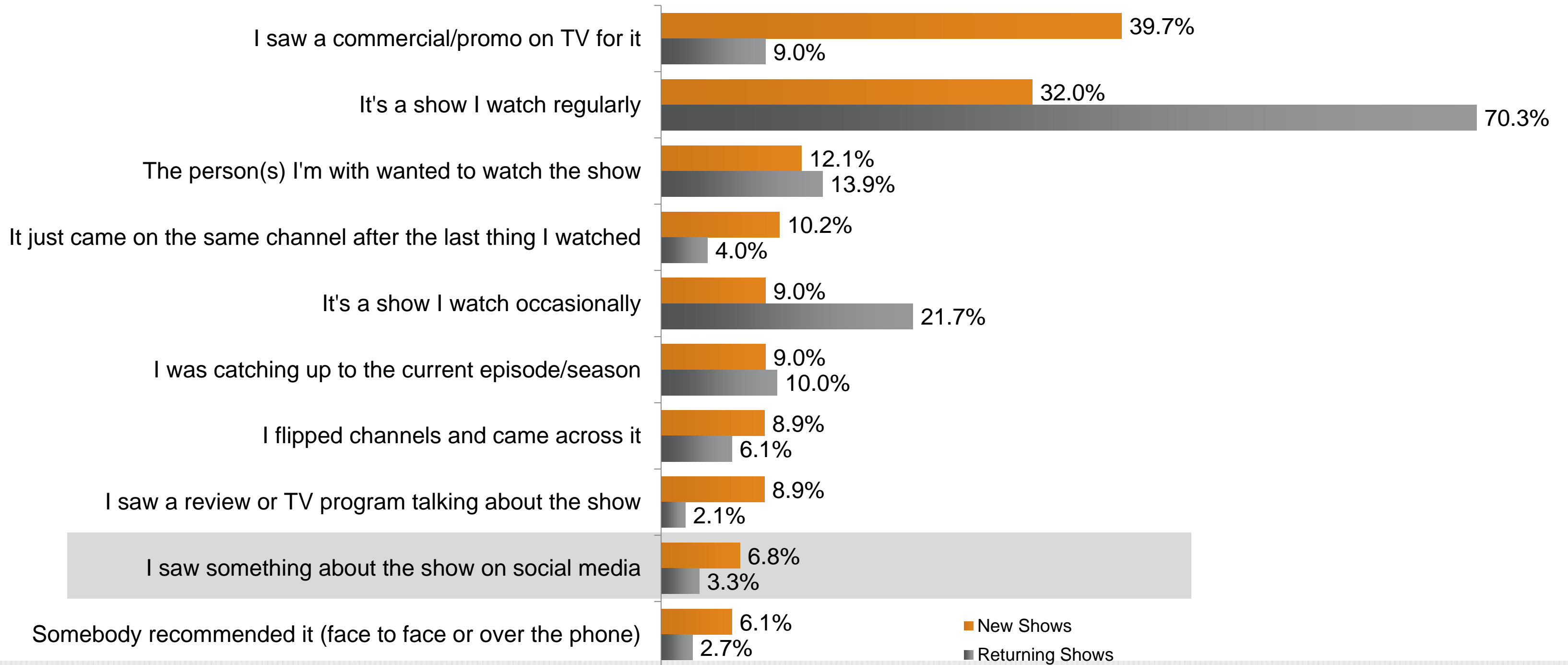


PROMOS ARE THE #1 DRIVER OF DECISIONS TO VIEW NEW SHOWS





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





DAILY TV-RELATED SM REACH

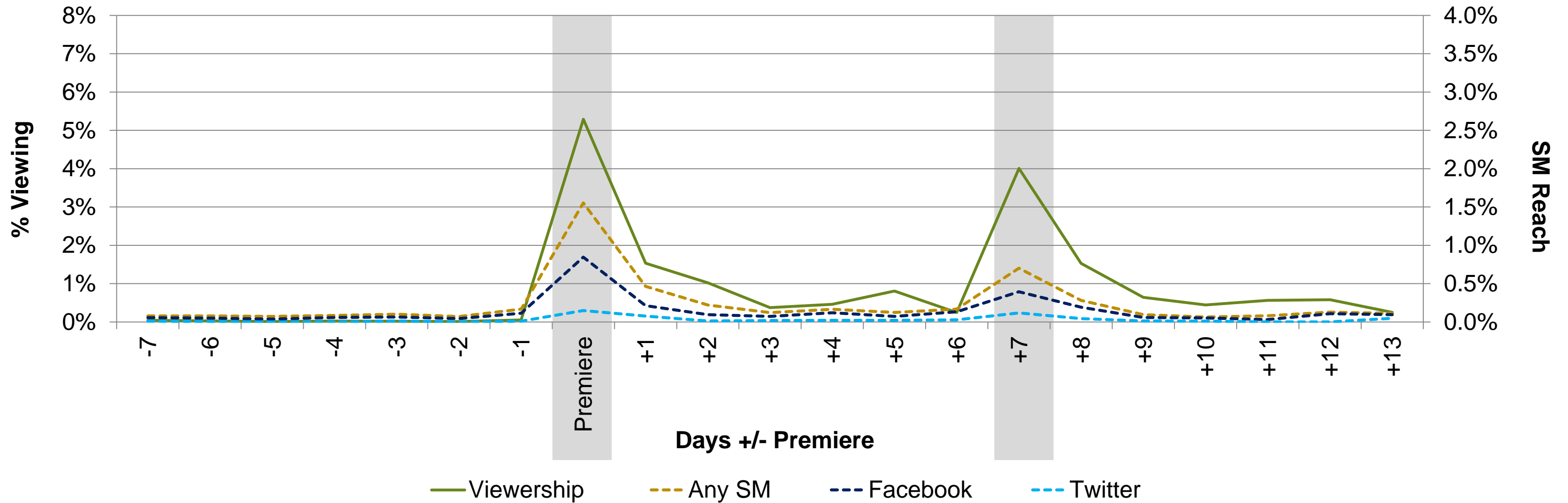
SM PEAKS AT NEW SHOWS' PREMIERES

AVERAGE REACH FOR NEWLY PREMIERING SHOWS

N=20 Newly Premiering Shows

Note:
Scale has changed
from previous slide

Note:
SM items shown on a
different scale.





DAILY TV-RELATED SM REACH

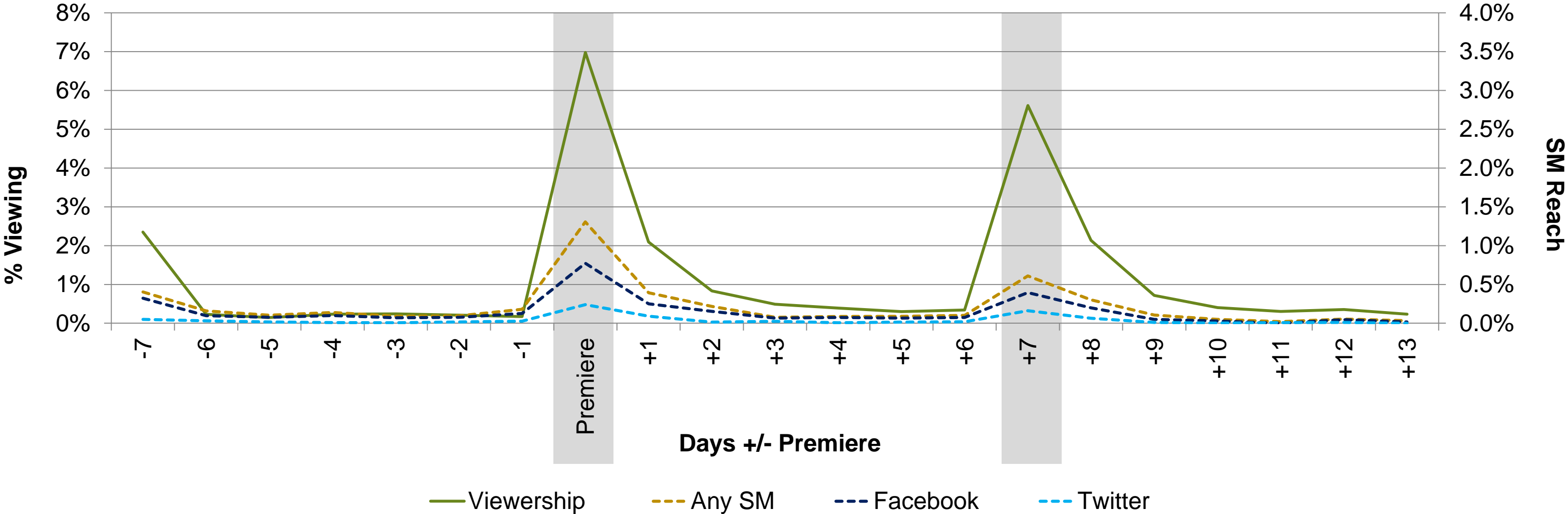
SM PATTERN CONSISTENT FOR RETURNING SHOWS

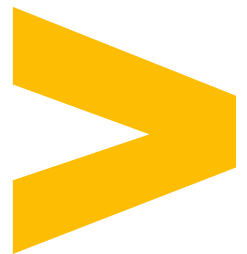
AVERAGE REACH FOR RETURNING SHOWS

N=20 Returning Shows

Note:
Scale has changed from previous slide

Note:
SM items shown on a different scale.





SECTION FOUR
SUPER CONNECTORS

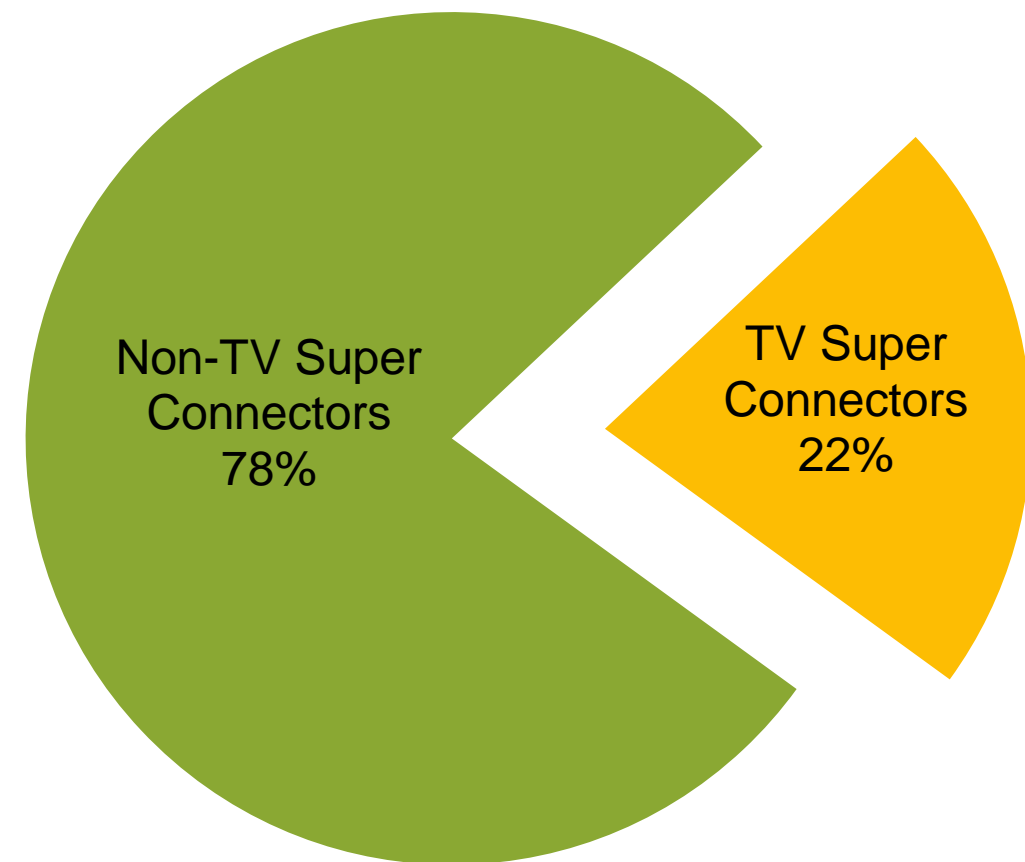


TV SUPER CONNECTORS

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



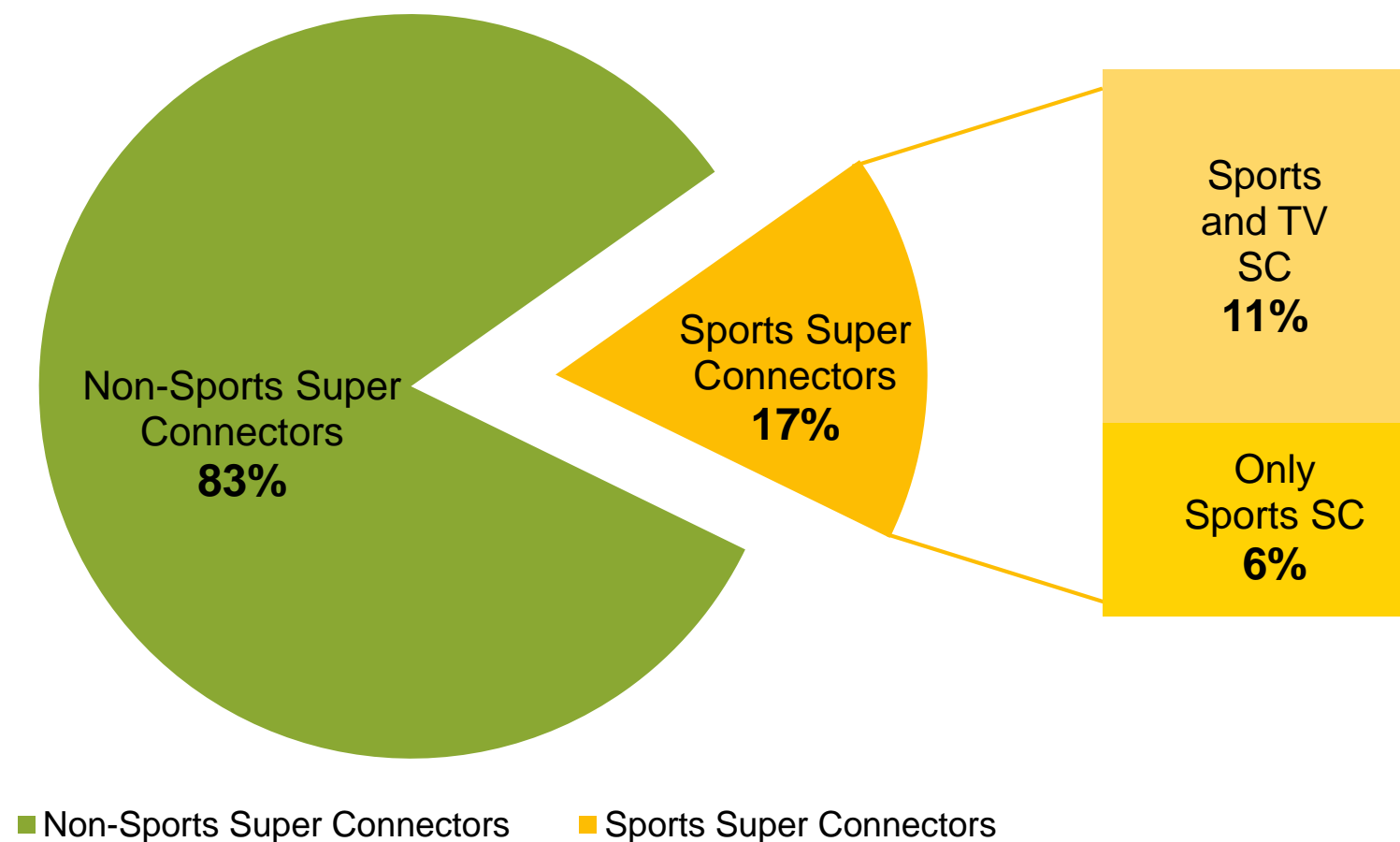
WE ALSO MEASURED SPORTS SUPER CONNECTORS

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

% OF RESPONDENTS

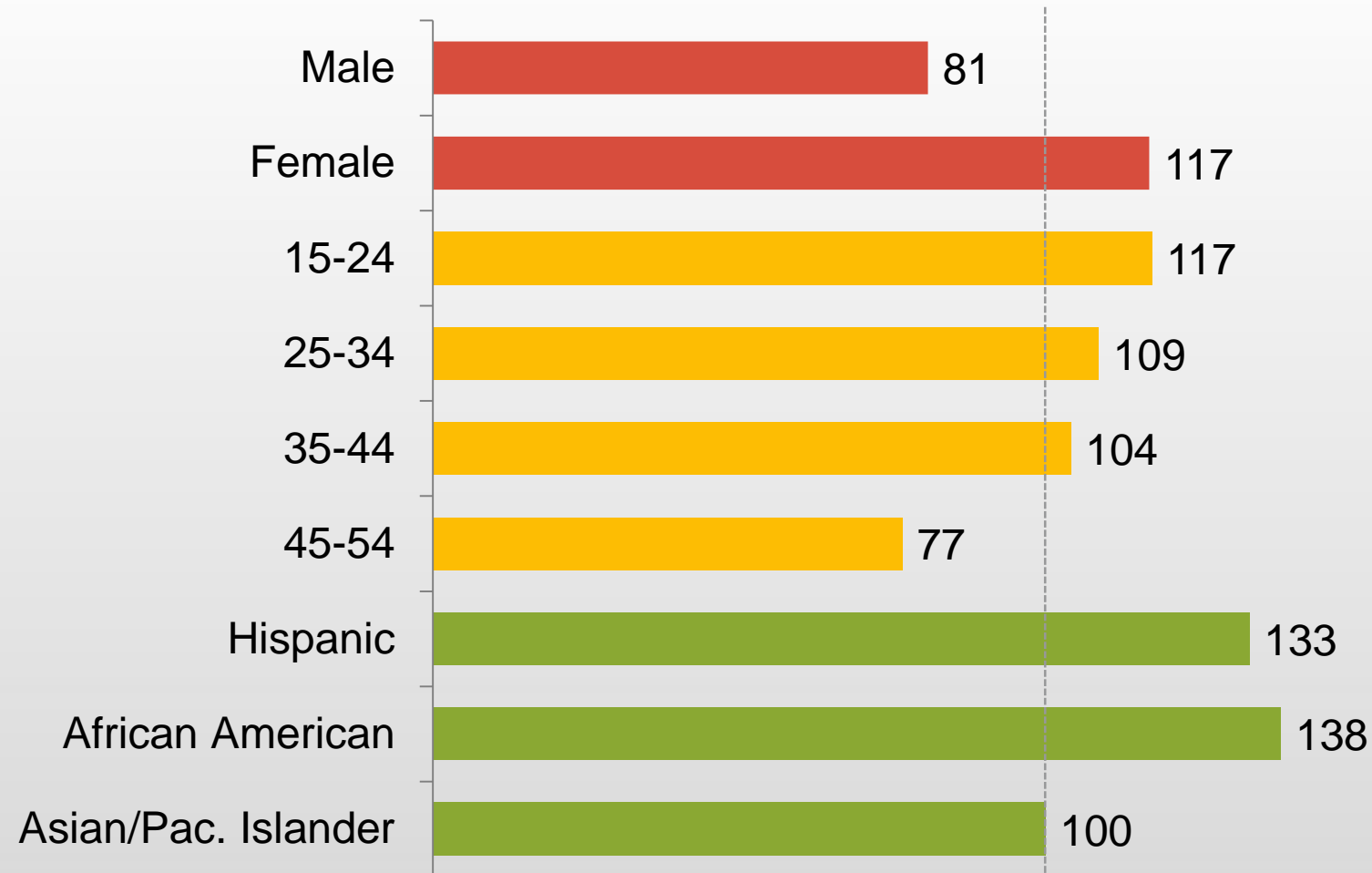


SUPER CONNECTORS TV SC'S SKEW FEMALE, SPORTS SC'S SKEW MALE; MULTICULTURAL ABOVE AVERAGE FOR BOTH

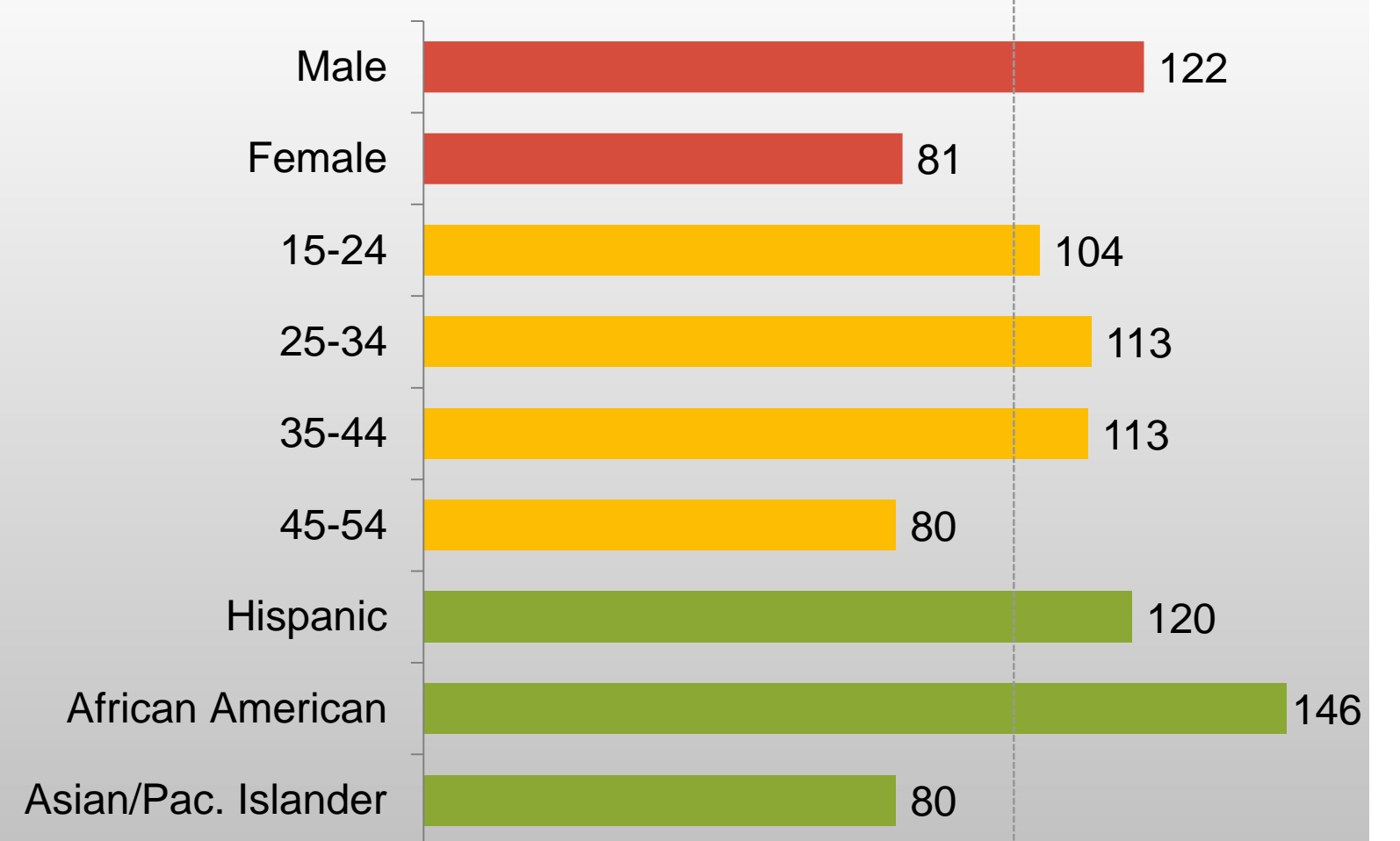
SUPER CONNECTOR DEMOGRAPHICS

Indexed to Total Sample

TV Super Connectors



Sports Super Connectors

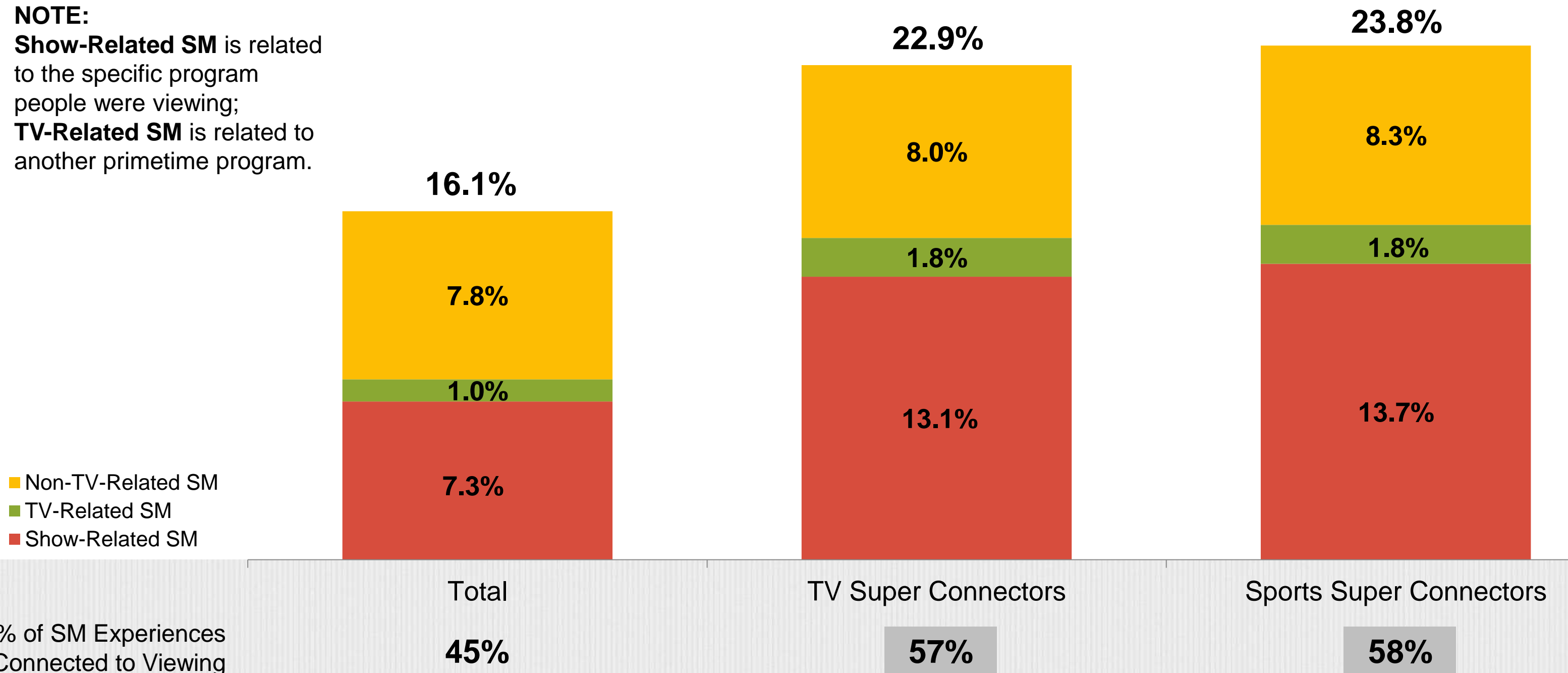




SUPER CONNECTORS ENGAGE IN MORE SM ACTIVITY & MORE OF IT IS RELATED TO TV

VIEWING INSTANCES INVOLVING SM

NOTE:
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TV-Related SM is related to another primetime program.





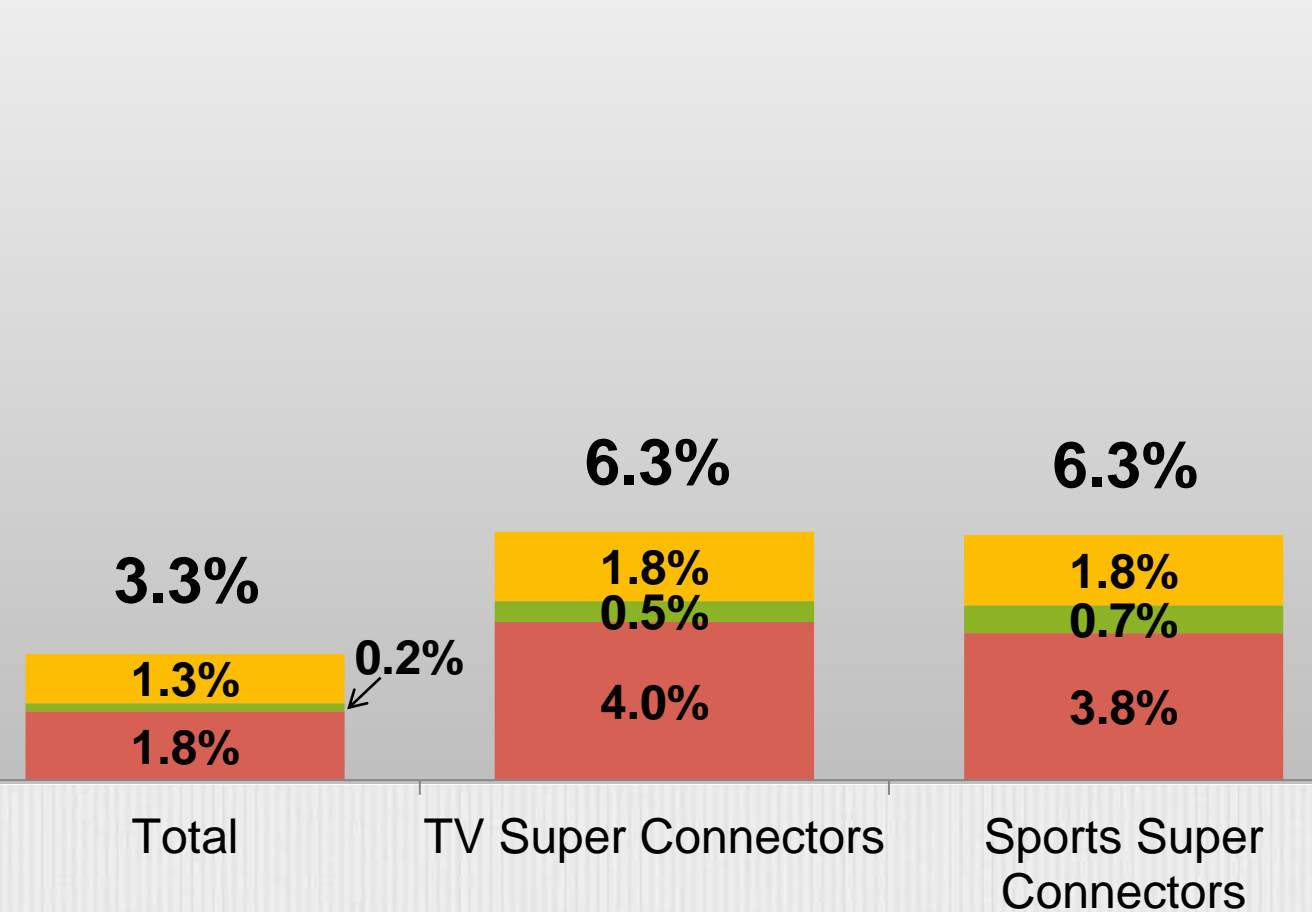
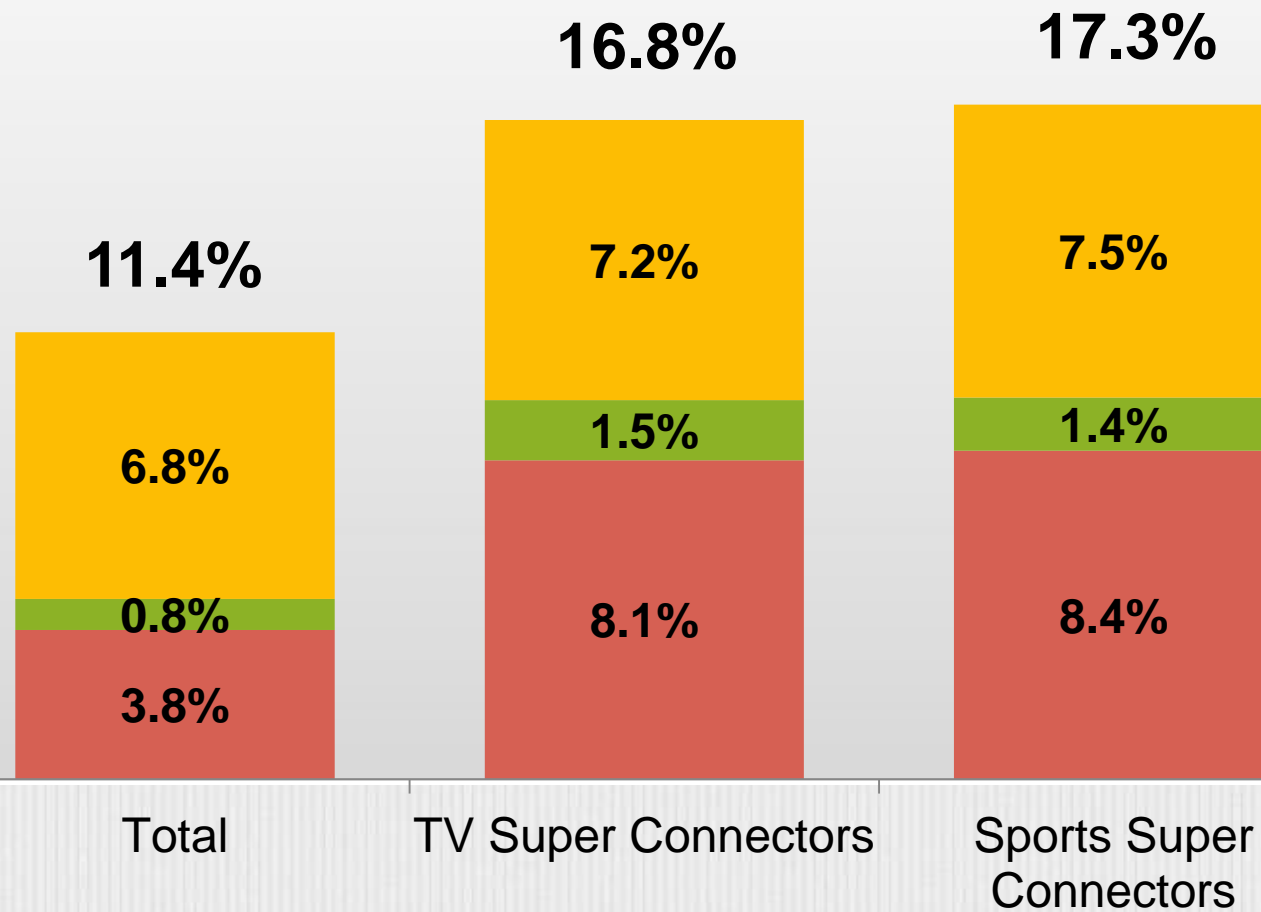
SUPER CONNECTOR SOCIAL MEDIA USE WHILE WATCHING TV, BY SOCIAL NETWORK

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.

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



% of SM Experiences Connected to Viewing

33%

48%

49%

55%

63%

60%



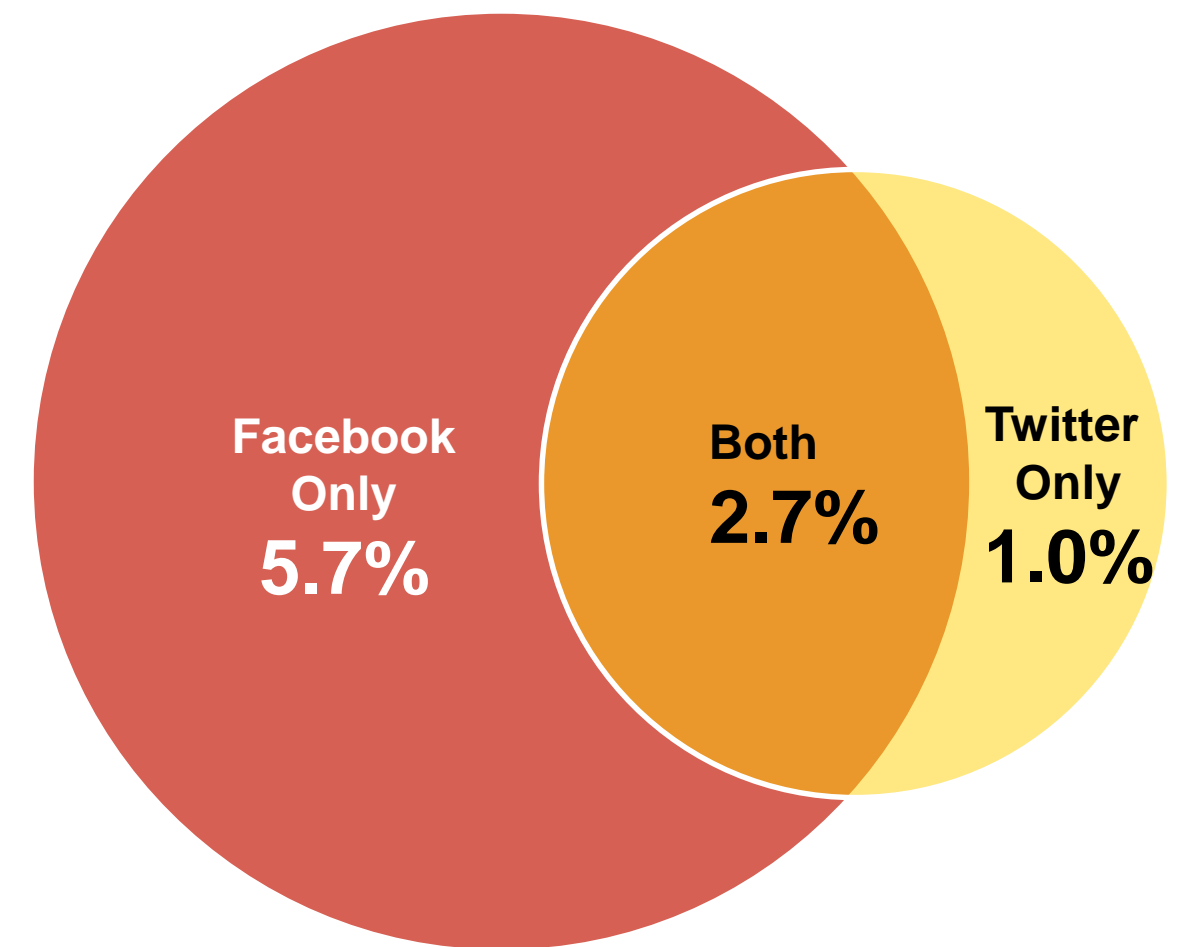
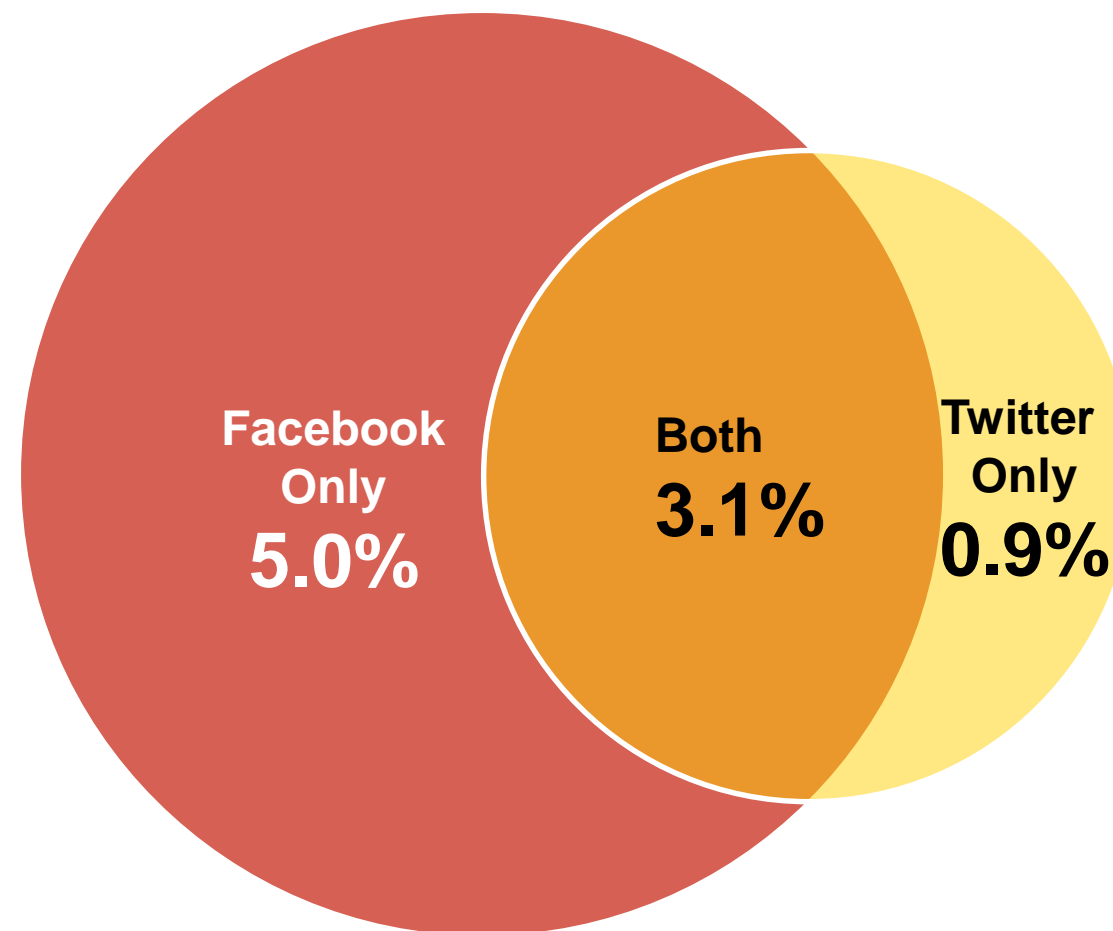
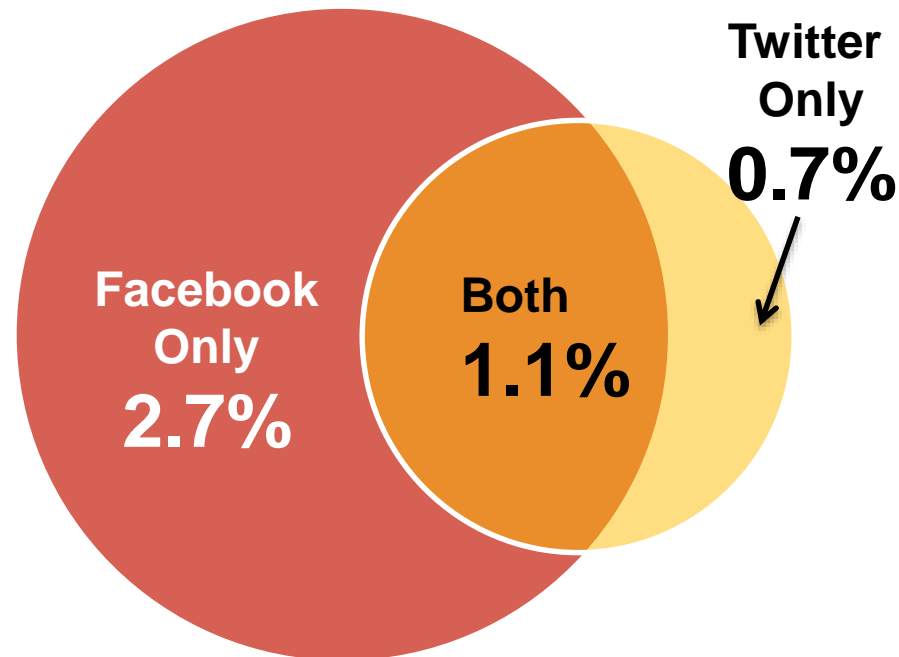


USE OF FACEBOOK AND TWITTER, WHILE WATCHING

TOTAL SAMPLE

TV SUPERCONNECTORS

SPORTS SUPERCONNECTORS





SECTION FIVE

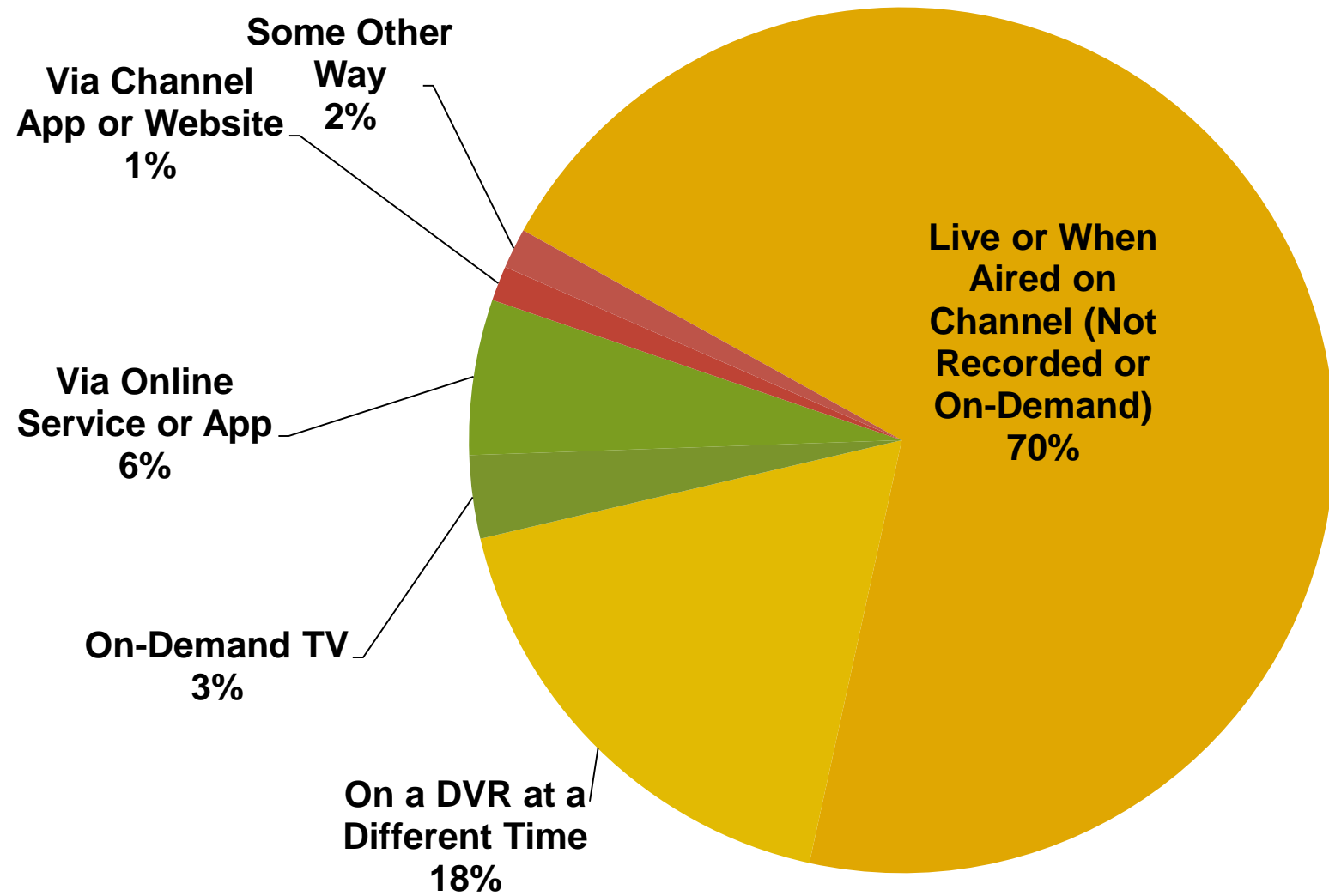
TIME SHIFTING, DEVICE USAGE, AND BINGE VIEWING



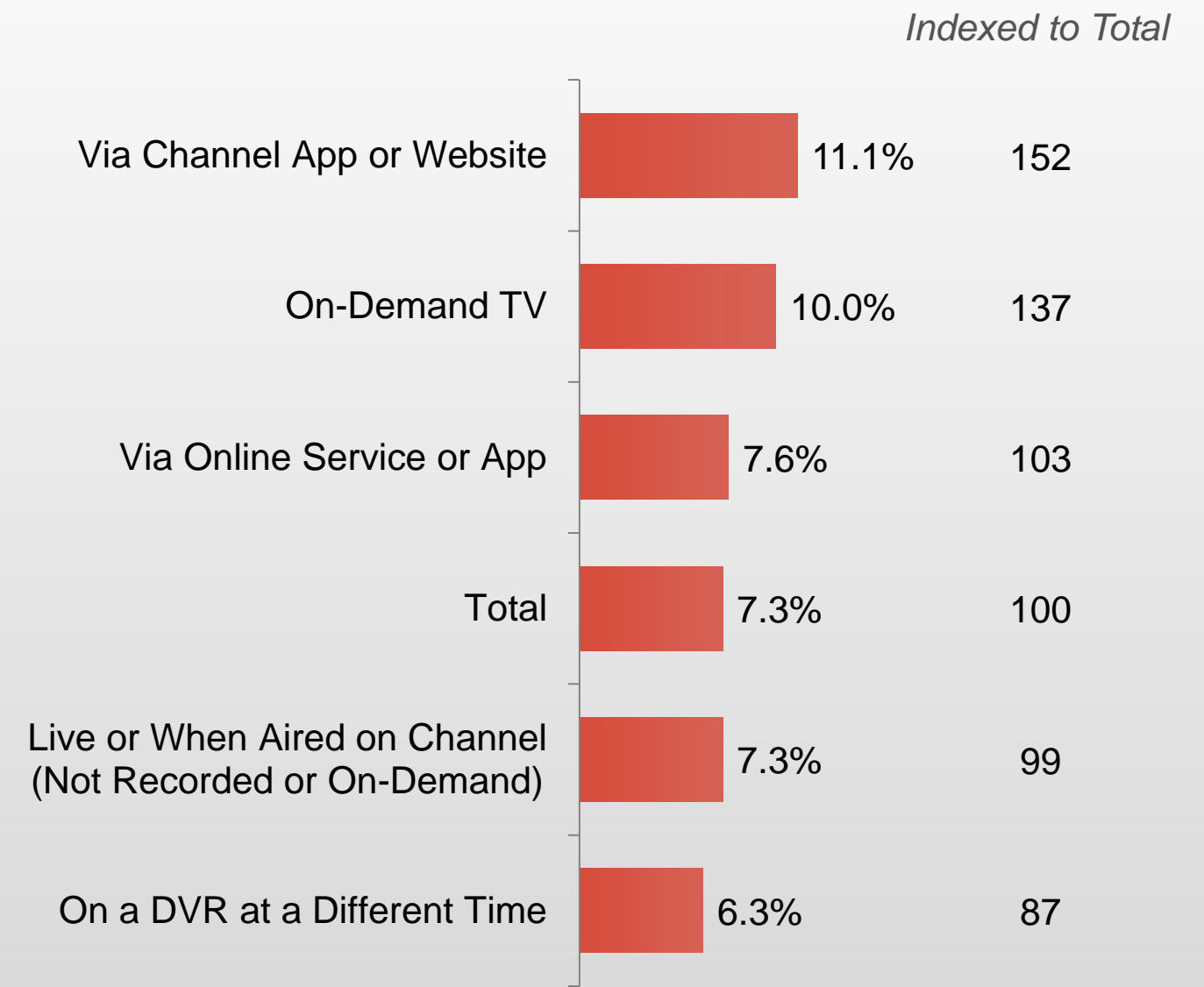


TIME SHIFTING MAJORITY OF VIEWING IS LIVE; SOCIAL MEDIA MOST LINKED TO DIGITAL & ON-DEMAND VIEWING

HOW VIEWED



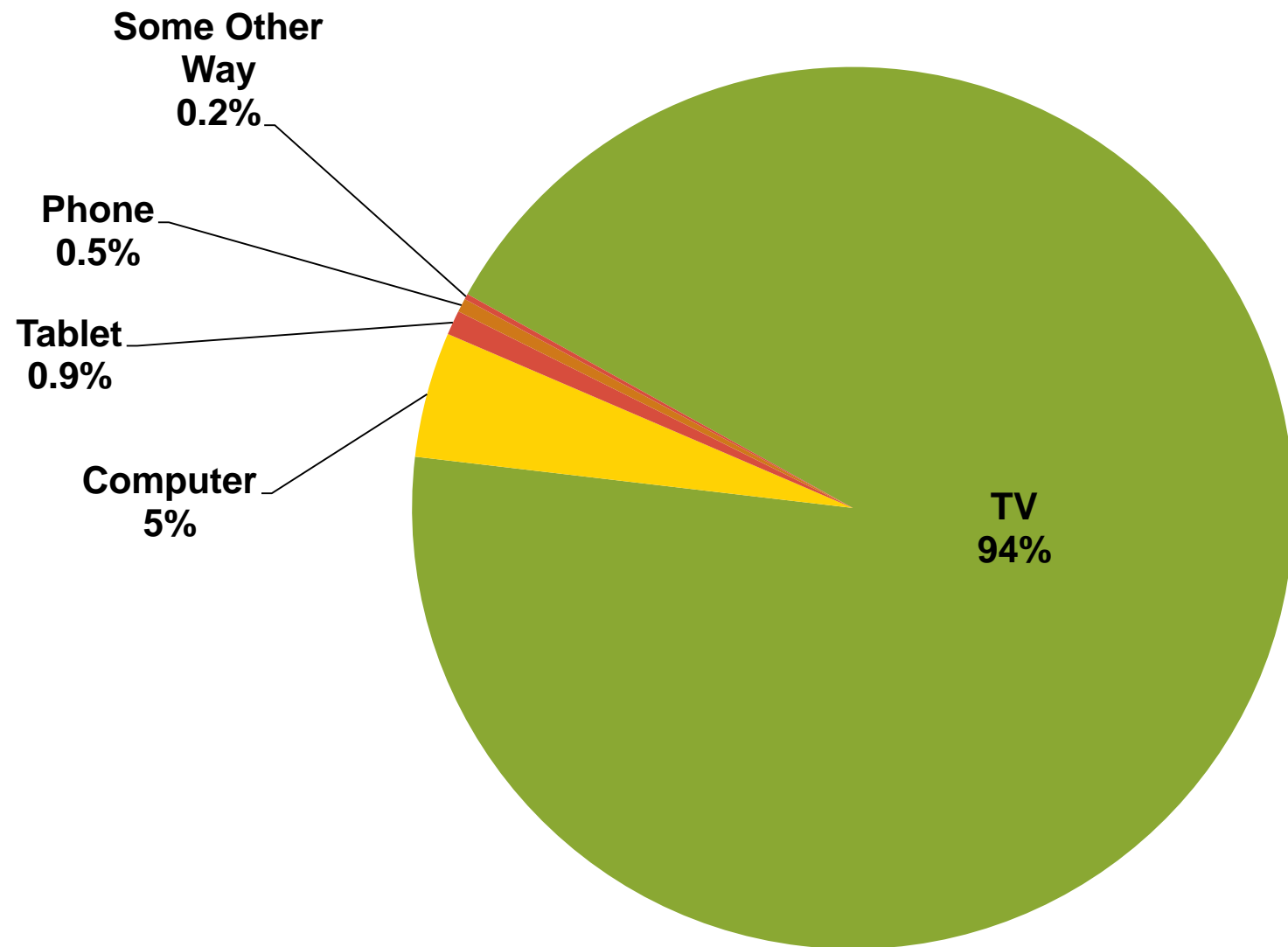
SOCIALLY CONNECTED VIEWING, BY MODE



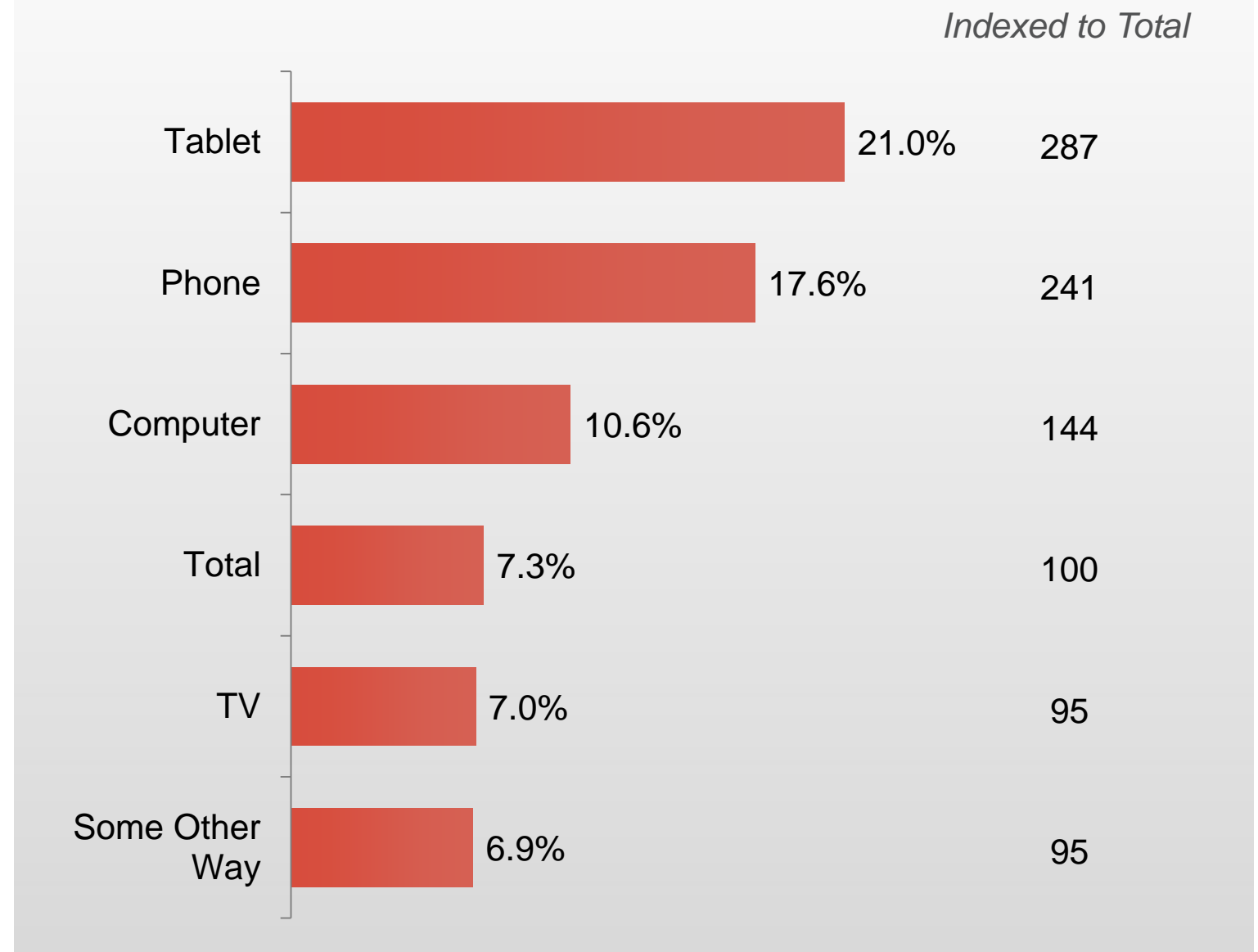


SECOND SCREENS MAJORITY OF VIEWING HAPPENS VIA TV... HOWEVER, SM INFLUENCE CLOSELY LINKED TO VIEWING ON NON-TRADITIONAL SCREENS

SCREEN USED TO VIEW



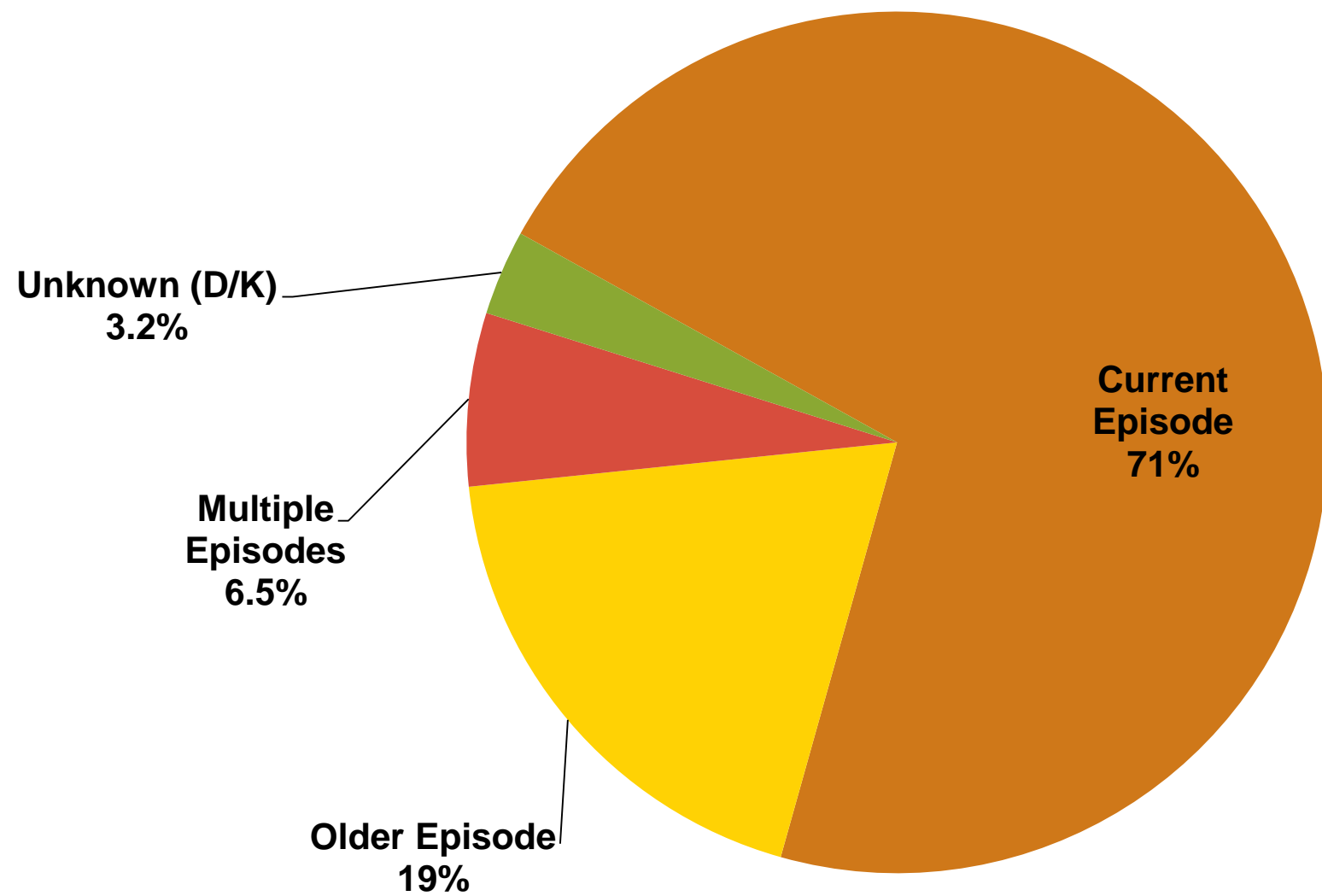
SOCIALLY CONNECTED VIEWING, BY SCREENS VIEWED



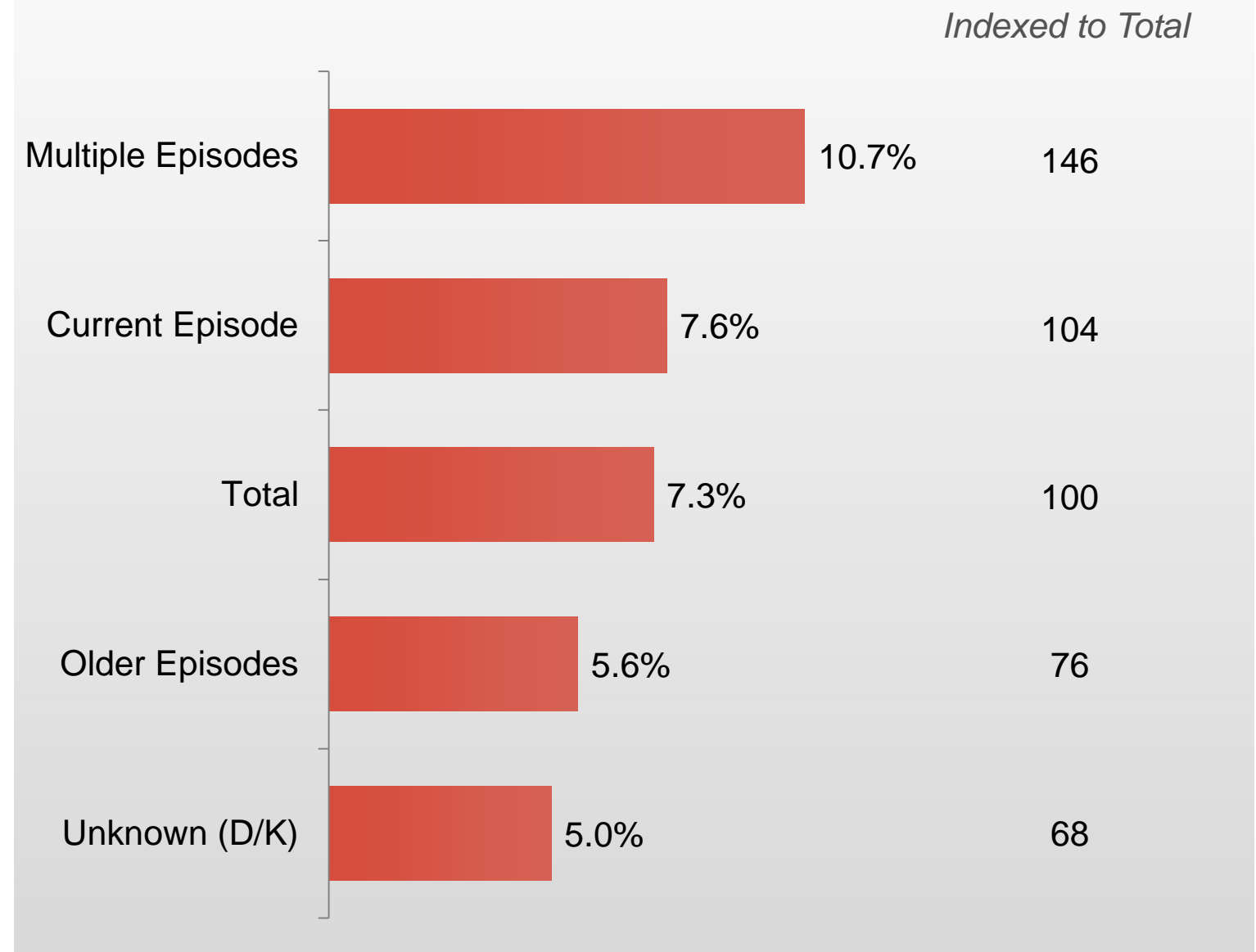


EPISODES VIEWED MOST RESPONDENTS VIEW CURRENT EPISODES... BUT BINGE-WATCHING MOST INFLUENCED BY SOCIAL MEDIA

EPISODE(S) VIEWED
Respondent Reported



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





SUMMARY
KEY FINDINGS



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

