

Talking Social TV

Keller Fay GROUP

Word of Mouth Research & Consulting



bluefin

nielsen
SOCIAL MEDIA

Understanding the Effects of Social Media & Television Viewing:

What Role Does it Play in Viewer Engagement?

June 25, 2013



Today's Program

- Welcome
 - Richard Zackon, CRE; Ira Sussman, Nielsen
- Study Results
 - Introduction: Beth Rockwood, Discovery Communications
 - Quantitative Diaries: Ed Keller, Keller Fay Group
 - Digital Ethnographies: Karen Benezra, Nielsen Life360
 - Buzz Insights: Jessica Hogue, Nielsen
 - Academic Review: Brad Fay, Keller Fay Group
 - Response: Paul Donato, Nielsen; Andrew Somosi, Social Guide
- Q&A
- Looking Forward



The Council for Research Excellence: The Social Media Committee

Beth Rockwood

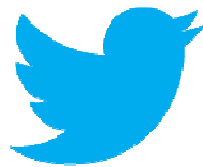
Discovery Communications, Chair

- Mike Hess, Nielsen
- Jessica Hogue, Nielsen
- Ceril Shagrin, Univision
- Robin Thomas, Tribune
- Emily Vanides, MediaVest
- Judy Vogel, Media Storm
- Stephanie Yates, TV One
- Tom Ziangas, AMC Networks

Richard Zackon, CRE, Facilitator



Goal: Develop the Most Accurate, In-Depth Understanding of How Social Media Impacts Viewing Behavior



Complementary/Comprehensive Research Methodology



- Connection between social media and television viewing
- Places social media & TV in context
- TV "Super Connectors" and how they use social media

Quantitative Survey +
Diary Check-Ins



- Subsample of users from quant phase
- Real-time behaviors: time spent, concurrent media use
- Triggers of activity, needs & methods used
- Self-created video ethnographies

Ethnography



- Social media conversations & what they reveal about viewing behaviors
- Key topics of social media TV discussions
- Drivers of positive and negative social media TV discussion

Social Media Analytics



- Relative Impact of Social TV on Viewing
- Complex, Extensive Data Sets Integrated
- Choice Modeling (Bayesian) Employed

Academic Team
Analysis



Survey/Ethnography: May/June 2012
Analytics: September 2011 through June 2012





PRIMARY QUANTITATIVE SURVEY

Keller Fay Group

Part I

KellerFay GROUP

Word of Mouth Research & Consulting



Quant Survey: Overview



- How social media (SM) affects television viewing, relative to other influences.
- N=1,708 adults ages 18-54
 - Fieldwork: May and June 2012
 - Incl. oversample of Spanish language dominant Hispanics
- Respondents completed an online profiling survey + 7-day diary via mobile app.
 - The diary tracked exposures throughout the day to **primetime programming** and **late local news**
 - Viewership, interpersonal communications, advertising and promos, and any other form of contact
 - A total of 27,533 diary entries were collected



How Does Social Media Affect TV Viewing?

Note: All references to television viewing relate to **Primetime** and **Late Local News** only

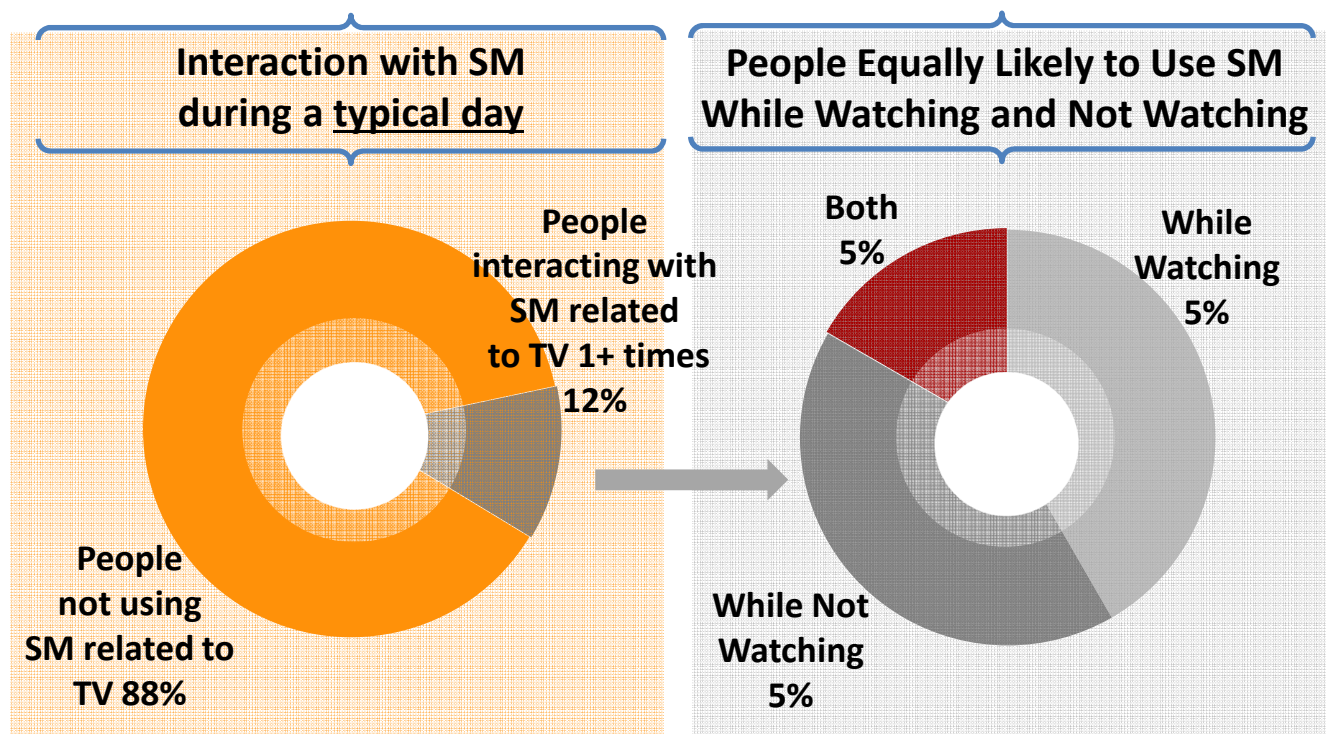
Social Media/TV Involvement

- **12%** daily reach*
- **37%** weekly reach*

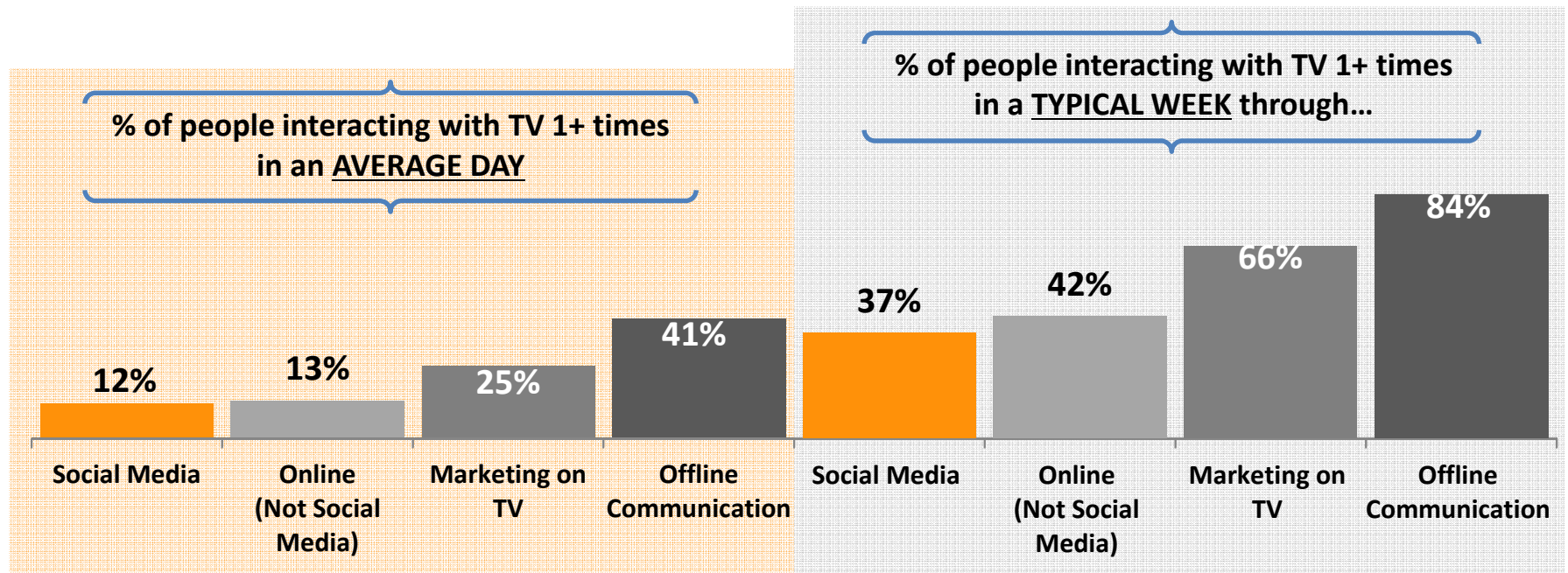
*% of people using SM to communicate about, seeing something on SM about, referencing something seen on SM about, or is the reason for watching a particular show in the time period



Of the 12% Daily, Social Media Usage Split Between Concurrent TV Watching and Not



Social Media Use in Context



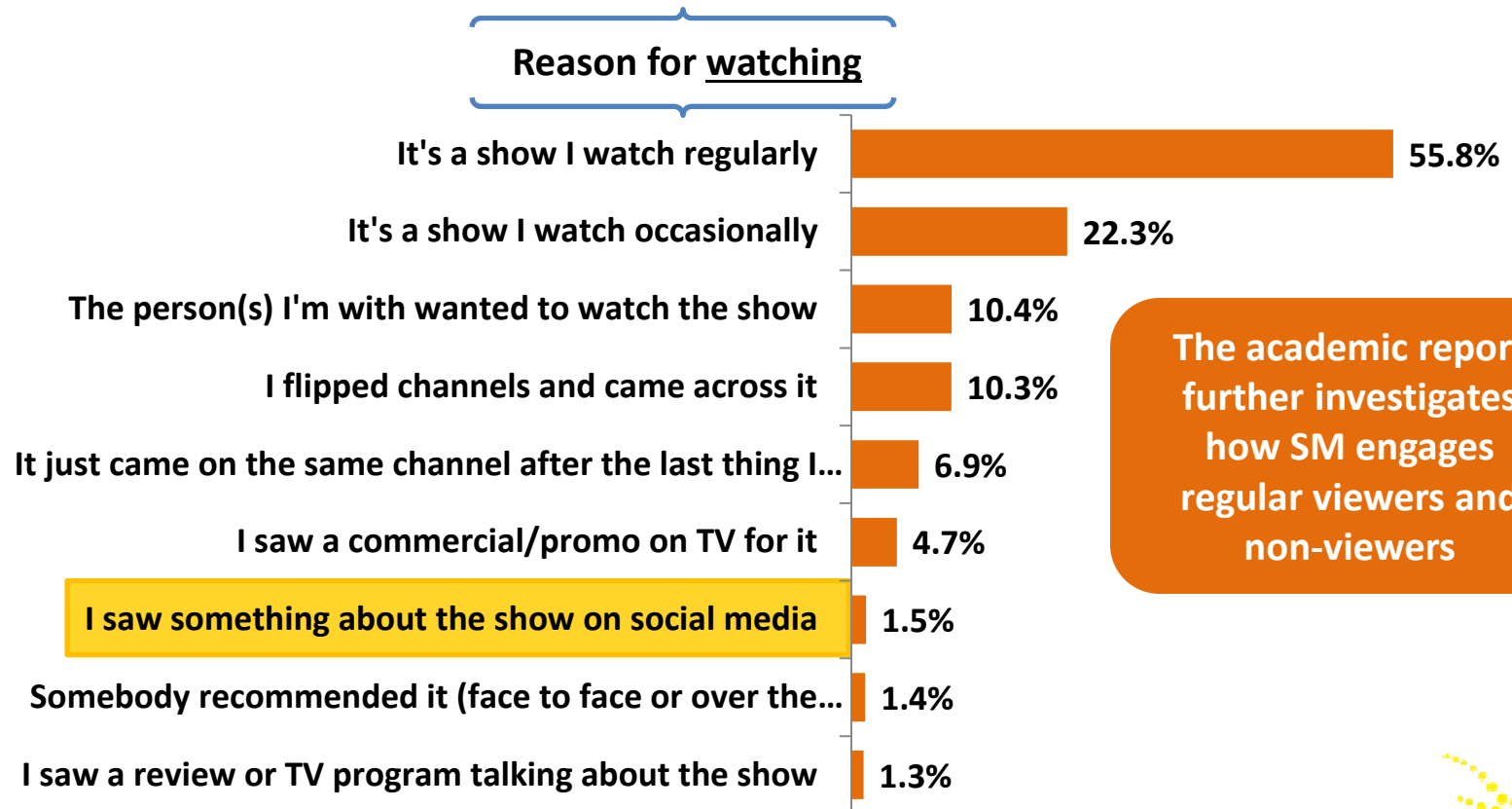
SM Plays Several Roles in People's Television Experience

- While Watching: **5.1%**
 - People watch specifically because of something they read or saw in SM: **1.5%**
 - People communicate via SM while viewing: **3.9%**
- While Not Watching: **12.9%**
 - People communicate via SM during non-viewing time: **7.4%**
 - People see something about a show in SM: **6.2%**
 - While communicating, something in SM was referred to: **3.0%**

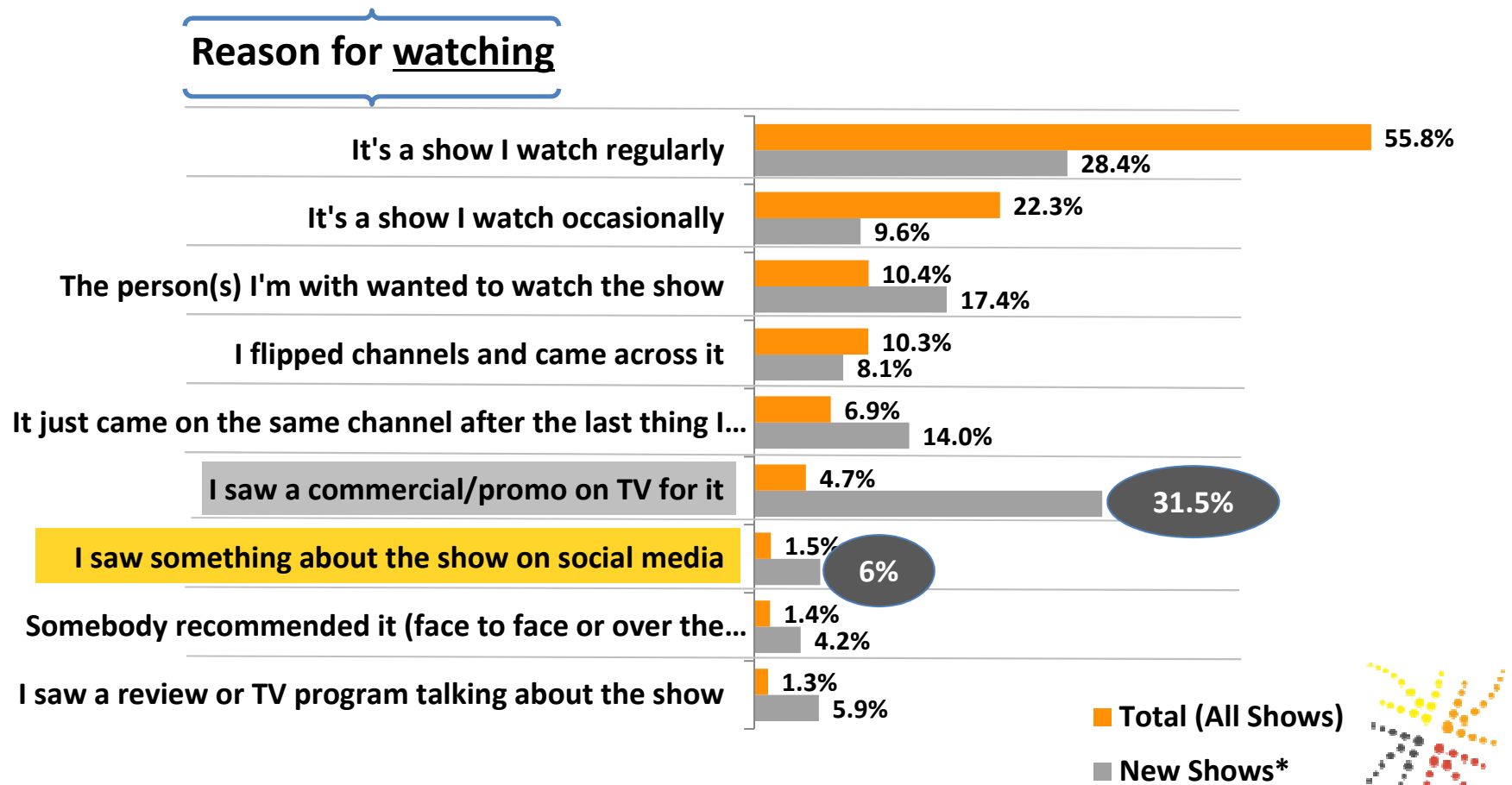


“Traditional” Factors Have More Influence on TV Viewing Than SM

(According to Respondent’s Self Report)



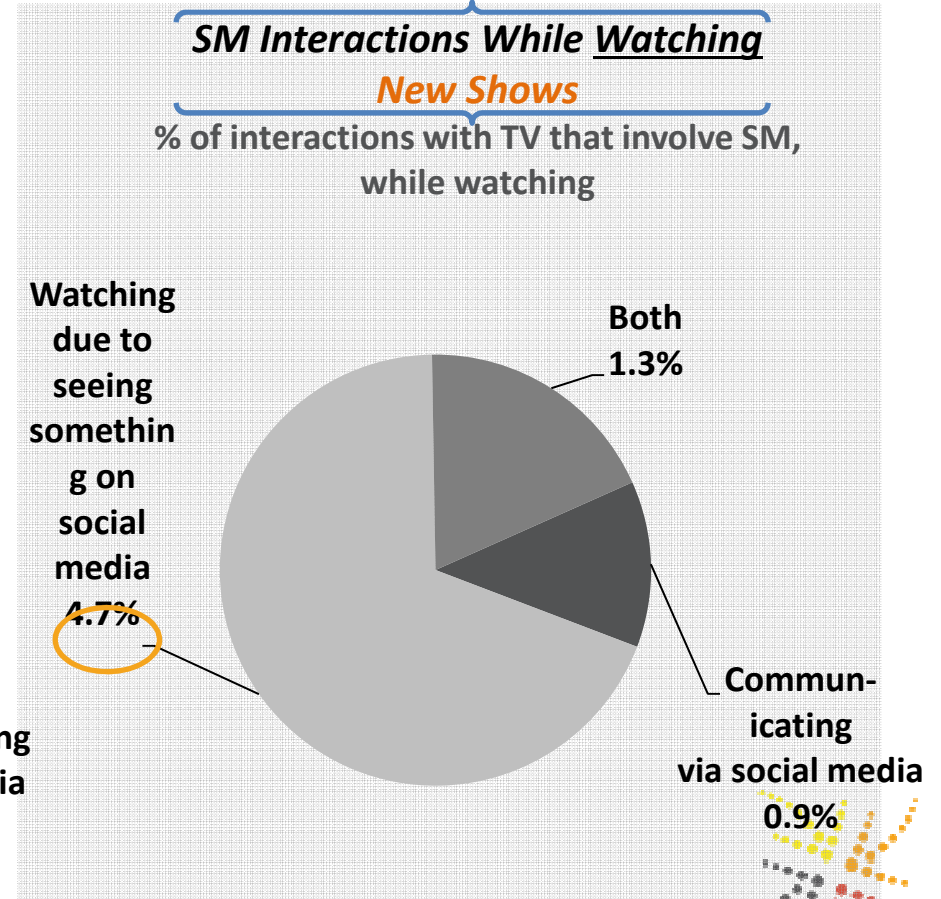
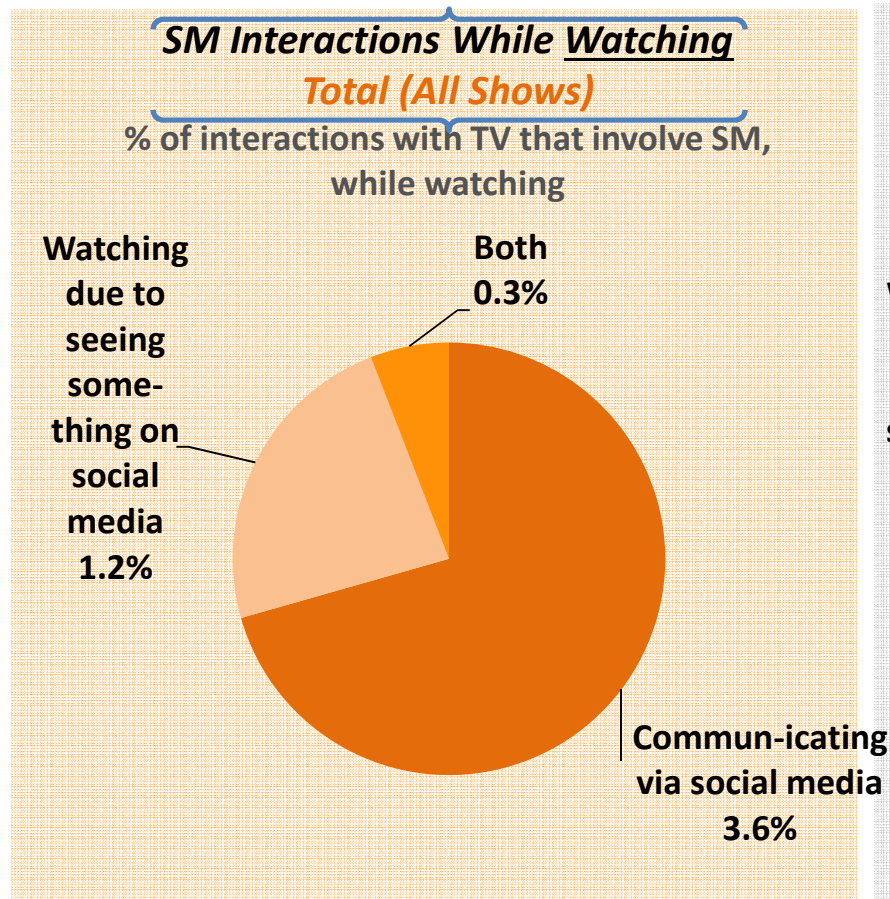
SM Role: Greater for New Shows Than for Ongoing Shows



*Note: 53 new shows, primarily on cable, premiered and were captured during the study.



For New Shows, SM is Primarily a Spark to Watch



SM Relatively More Important among Hispanics, 25 – 44s; 18-24s Above Average While Watching Only

SM Interaction While Watching by Demographics

% of TV interactions that involve SM, while watching

Indexed to Total

Hispanic	8.1%	158
Age 18-24	6.8%	134
Age 25-34	6.2%	122
Age 35-44	6.2%	122
Women	5.1%	101
Total	5.1%	100
Men	5.1%	99
White/Other	4.9%	95
Black	4.0%	79
Age 45-54	2.7%	53

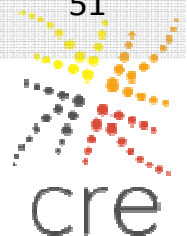
18-24s –
above
average
while
watching,
below
average
when not

SM Interaction While Not Watching by Demographics

% of TV interactions that involve SM, while not watching

Indexed to Total

Age 25-34	18.1%	140
Age 35-44	16.0%	124
Hispanic	15.3%	118
Women	13.6%	106
White/Other	13.5%	104
Total	12.9%	100
Men	12.1%	94
Age 18-24	11.2%	87
Black	6.9%	53
Age 45-54	6.6%	51

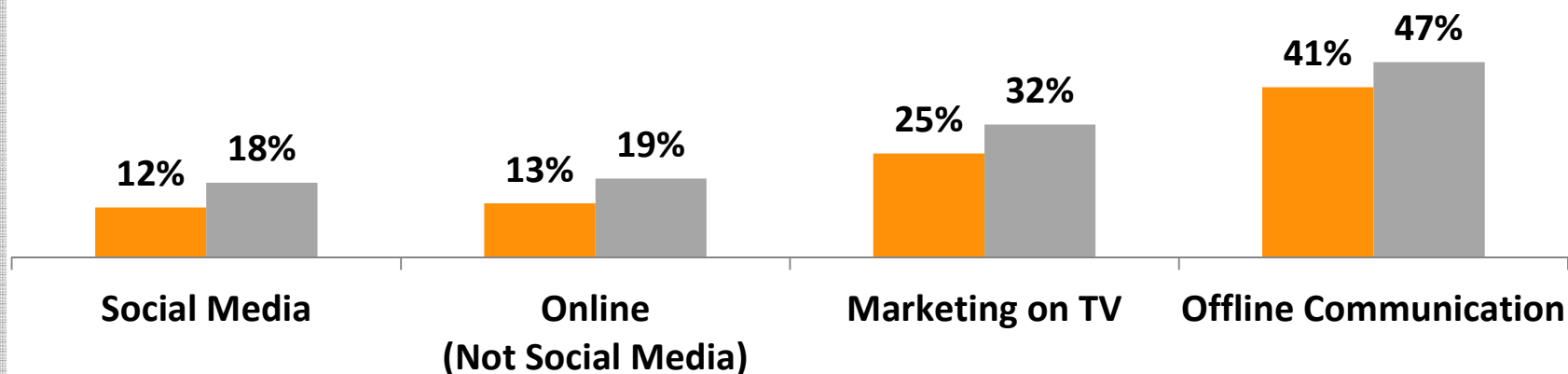


Note: See Appendix I for further detail

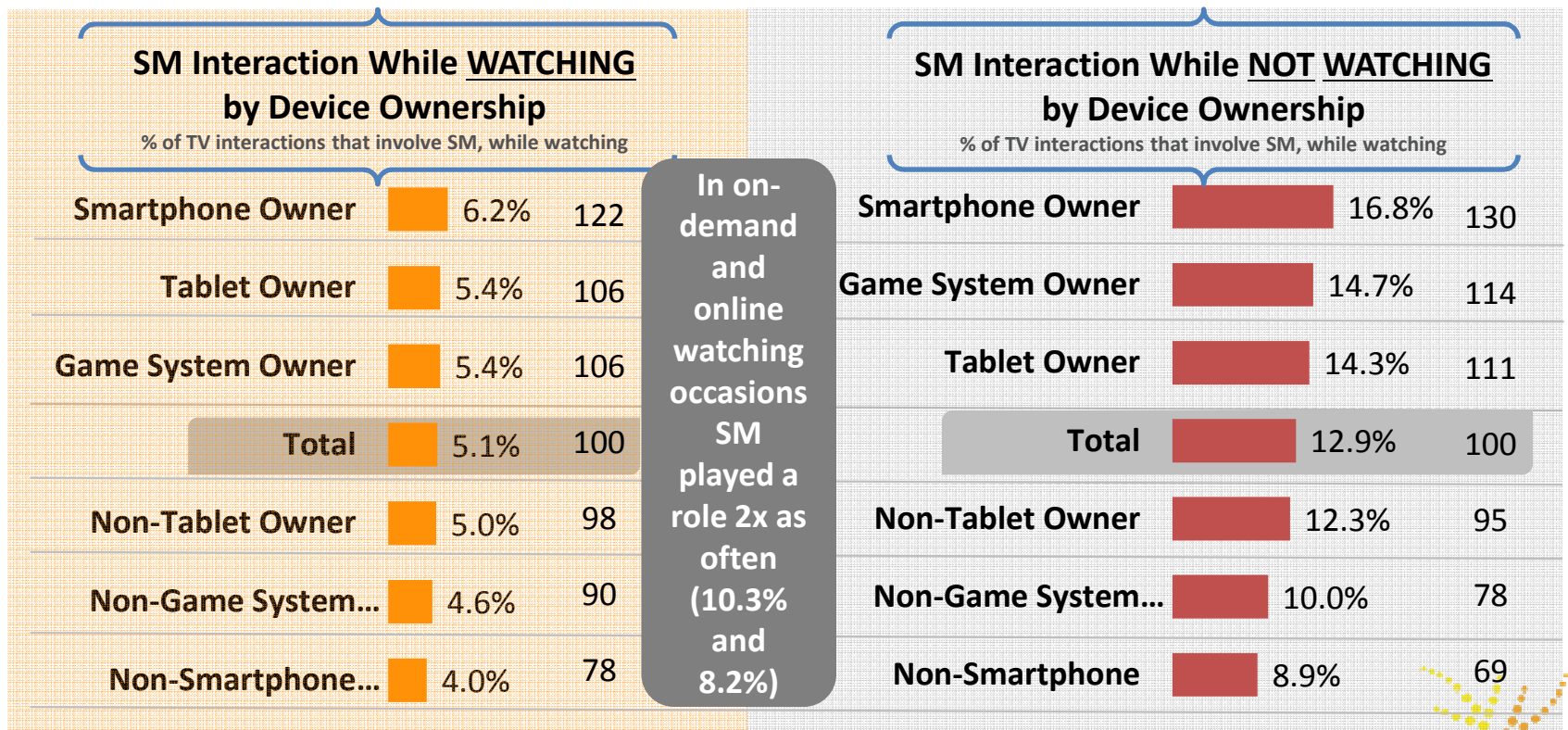
Hispanics are More Likely Than Total Adults to Interact With/Talk about TV – via SM and Other Channels

% of people interacting with TV 1+ times
in an average day through...

■ Total ■ Hispanics

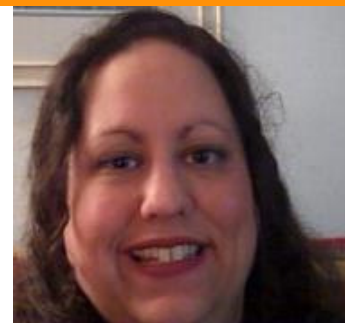


Mobile Device Ownership Increases SM Interaction





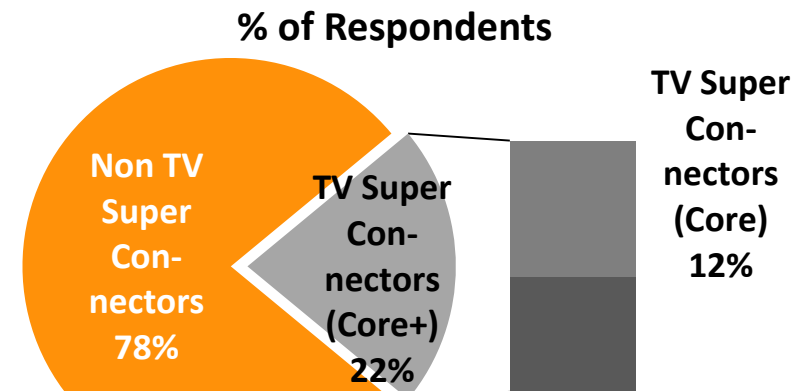
The TV Super Connectors



The “TV Super Connectors”

- A key objective was to drill down into the behaviors of the most active users of social media as it relates to TV
- Two groups were identified based on survey data

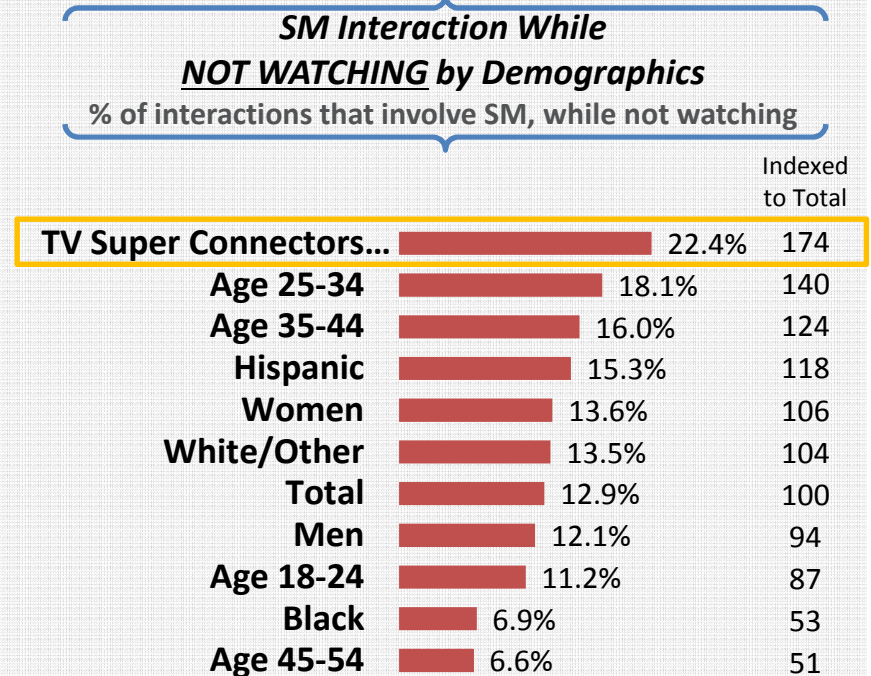
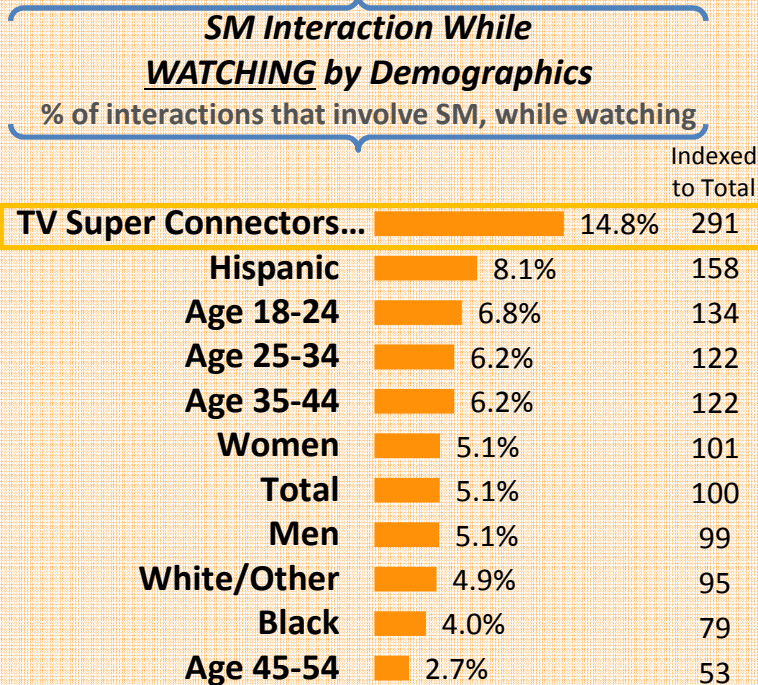
- **TV Super Connectors (Core): 12% of public who use SM to...**
 - Communicate about characters on shows you watch (top box) OR
 - Follow shows you watch on TV (top box) OR
 - Follow actors/personalities you watch on TV (top box)
- **TV Super Connectors (Core+): 22% of public**
 - Same criteria, but broader definition for each (top two boxes)



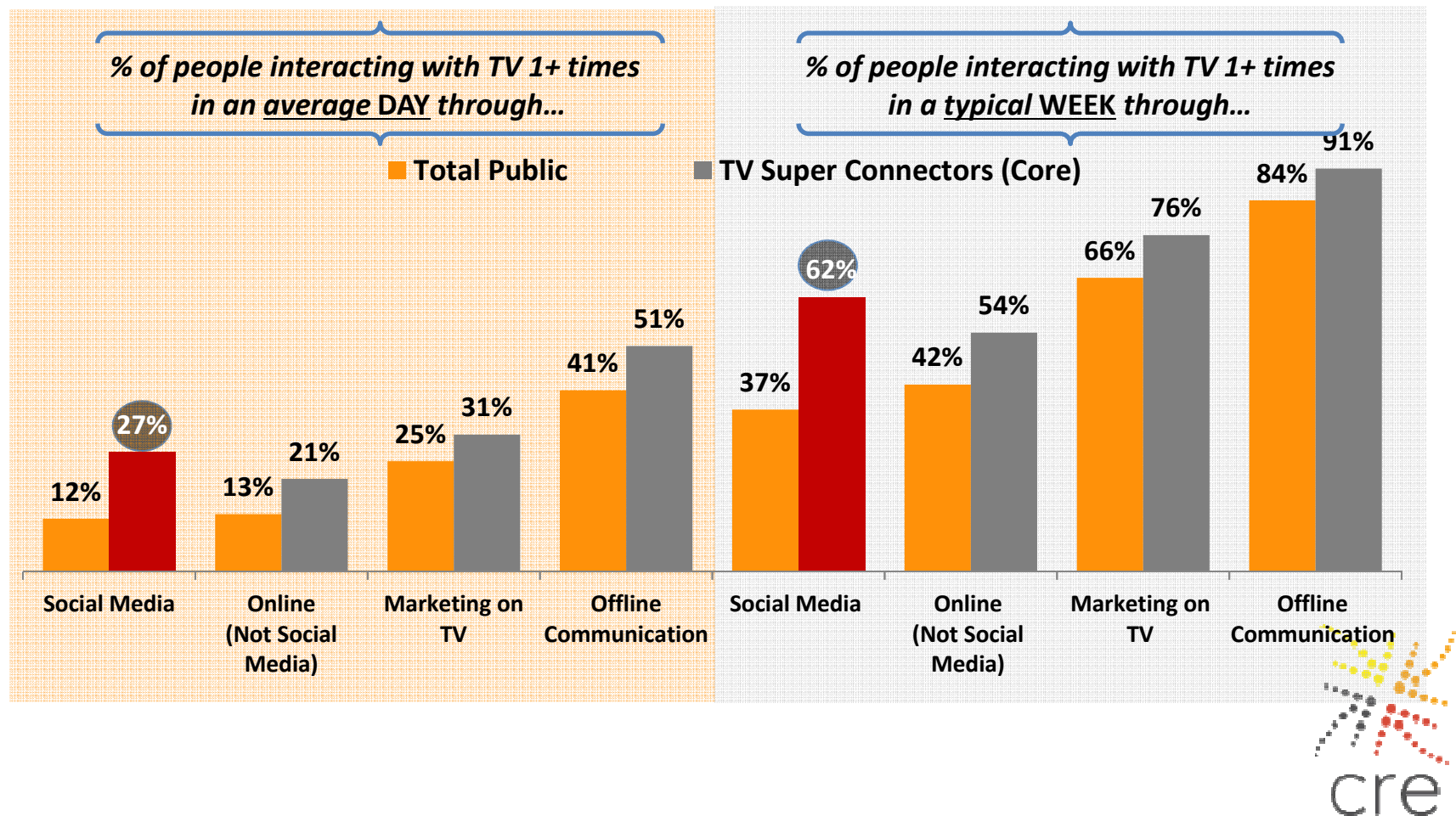
TV Super Connectors: Tend to be Younger, More Female; Other Groups Are Active and Show Growth Potential Over Time

		Total Public	TV Super Connectors (Core)	TV Super Connectors (Core+)
Gender	% of Total Public	100%	12%	22%
	Male	49%	35%	43%
	Female	51%	65%	57%
Age	18-24	19%	23%	24%
	25-34	26%	34%	32%
	35-44	27%	28%	27%
	45-54	28%	14%	17%
	Mean Age	36.4	32.9	33.5

TV Super Connectors are Most Likely Segment to Use Social Media, Both While Watching and When Not



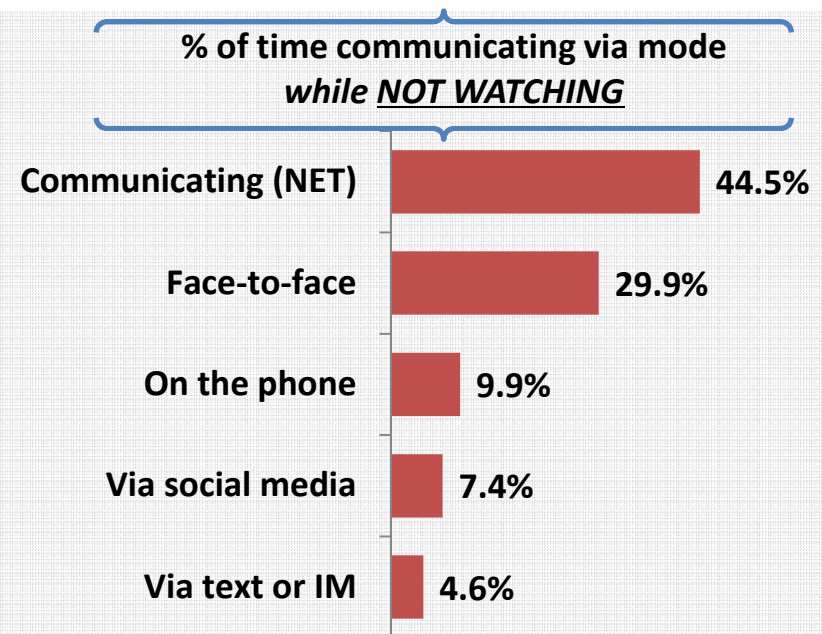
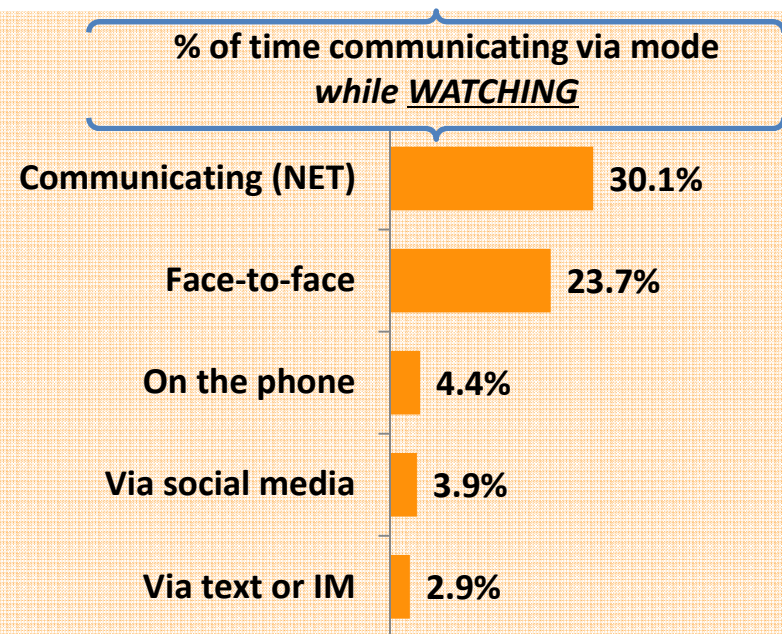
TV Super Connectors More Likely to Interact with TV in General – Via SM and Other Channels





Topics of TV Conversations

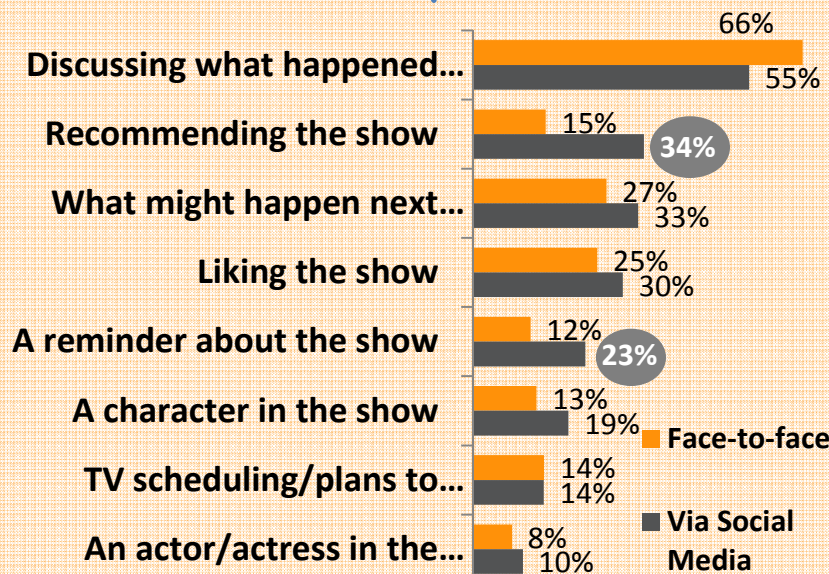
Face-to-Face is Dominant Mode of Communication about TV , Both While Watching and When Not



Talk Topics: Varies for Social Media vs. Face-to-Face

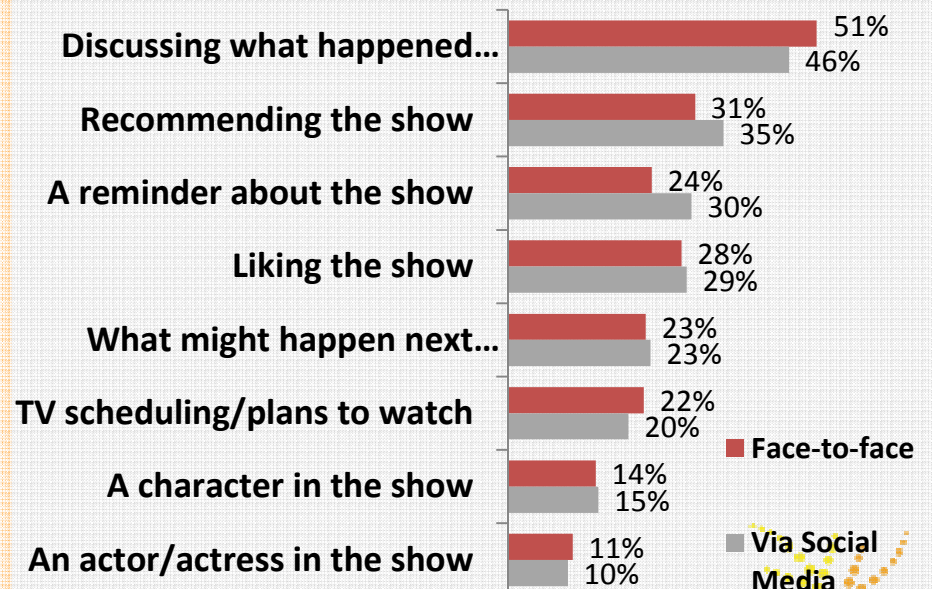
WHILE WATCHING, SM Used for Recommending, Reminding

Topic of conversation about show when communicating
face-to-face vs. via SM while watching



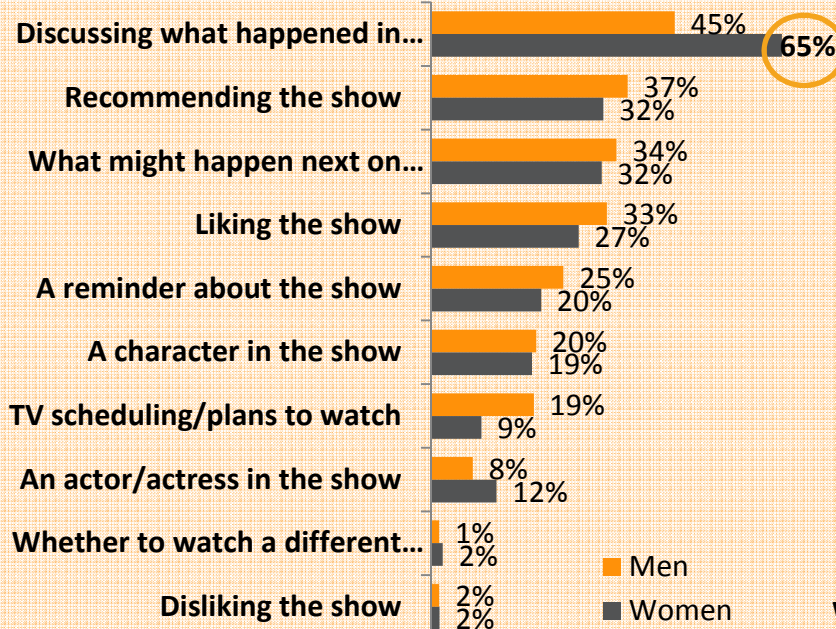
WHILE NOT Watching, Content More Similar

Topic of conversation about show when communicating
face-to-face vs. via SM while not watching

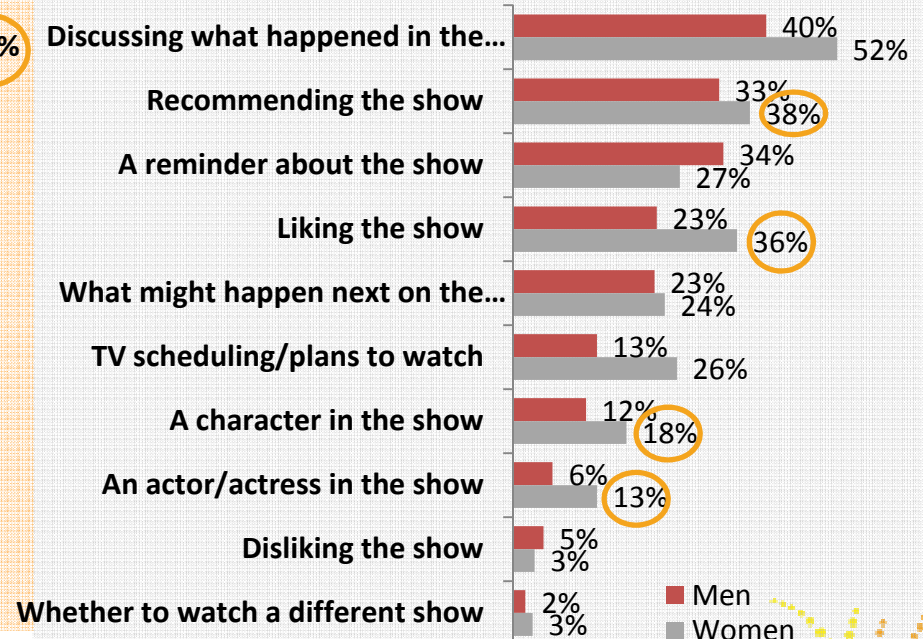


Women are More Likely to Discuss What Happened in the Show, Both While Watching and While Not

Topic of conversation about show when communicating via SM while WATCHING by gender

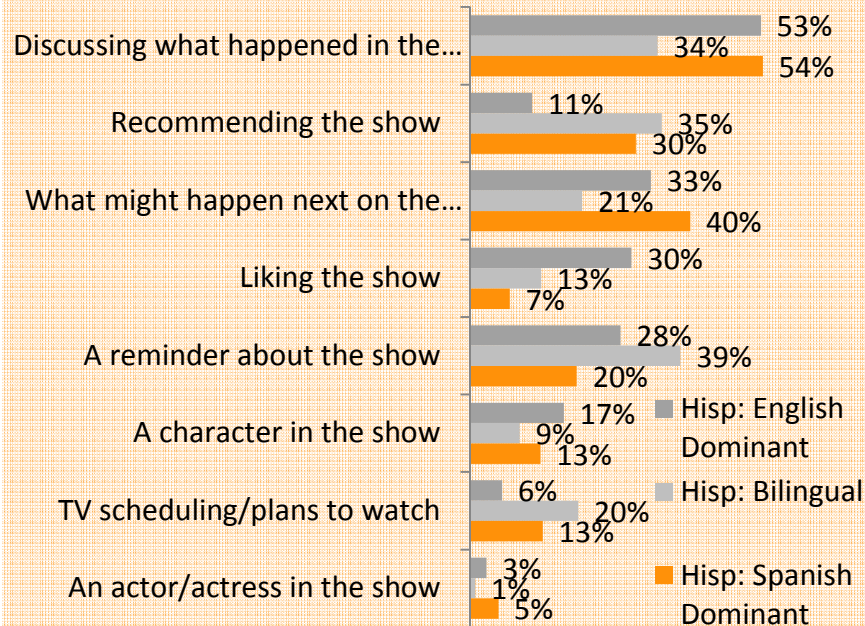


Topic of conversation about show when communicating via SM while NOT WATCHING by gender

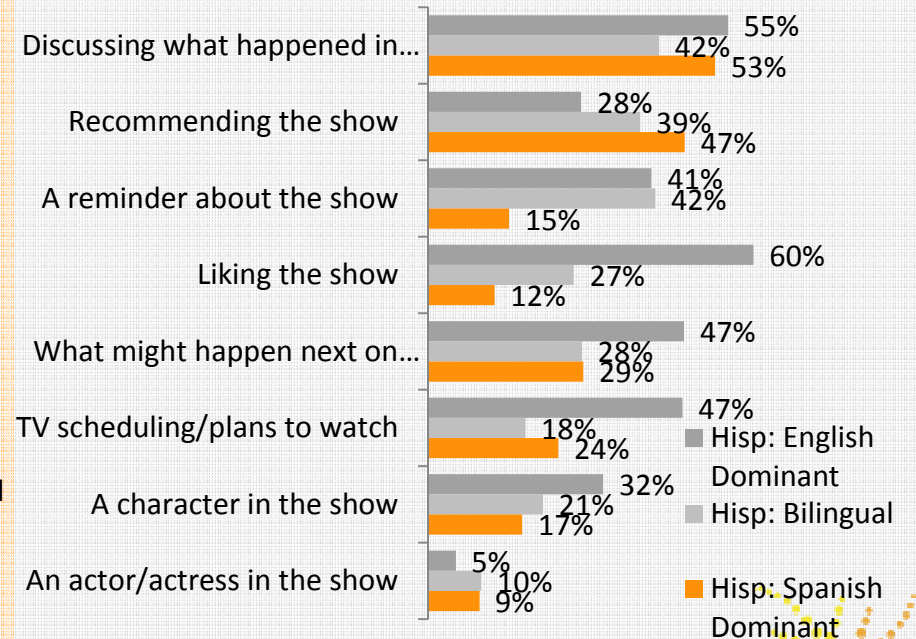


Spanish Dominant Use SM to Discuss What Happened/Will Happen While Watching; Bilingual Hispanics – as a Reminder

Topic of conversation about show when communicating via SM while Hispanics are WATCHING by language spoken at home



Topic of conversation about show when communicating via SM while Hispanics are NOT WATCHING by language spoken at home





Social Media Use by Genre

SM Use Strongest for Sci-Fi, Sports, Talk/News

SM Interaction While WATCHING by Genre

% of time SM is used to communicate about or is
the reason for watching a particular show

		Indexed to
Sci-fi	8.2%	Total 160
Sports	7.1%	139
Reality	5.7%	112
Talk/News	5.6%	109
Documentary	5.4%	106
Total	5.1%	100
Special	4.9%	95
Other	4.7%	92
Movies	4.5%	88
Drama	3.9%	76
Comedy	3.5%	69
Children/Family	2.3%	45

High
Variance:
Reality

High
Variance:
Comedy

SM Interaction While NOT WATCHING by Genre

% of TV interactions that involve SM, while watching

		Indexed to
Sci-fi	22.8%	Total 177
Sports	18.3%	142
Talk/News	16.0%	124
Comedy	15.1%	117
Total	12.9%	100
Other	12.4%	96
Drama	10.1%	78
Movies	9.6%	75
Special	9.4%	73
Reality	9.0%	70
Documentary	6.5%	50
Children/Family	4.1%	32

While Watching, Most SM Content Relates to What Occurred on Show – Except Comedy (Recommending & Liking)

While Watching:

- **News** discussions are most often related to "what happened"
- **Comedy** conversations focus on recommending and liking the show
- Anticipation of future episodes most common in **Reality & Drama**
- Characters most commonly come up in conversations about **scripted shows**
- The actors are most likely to be discussed in conversations related to **comedies**



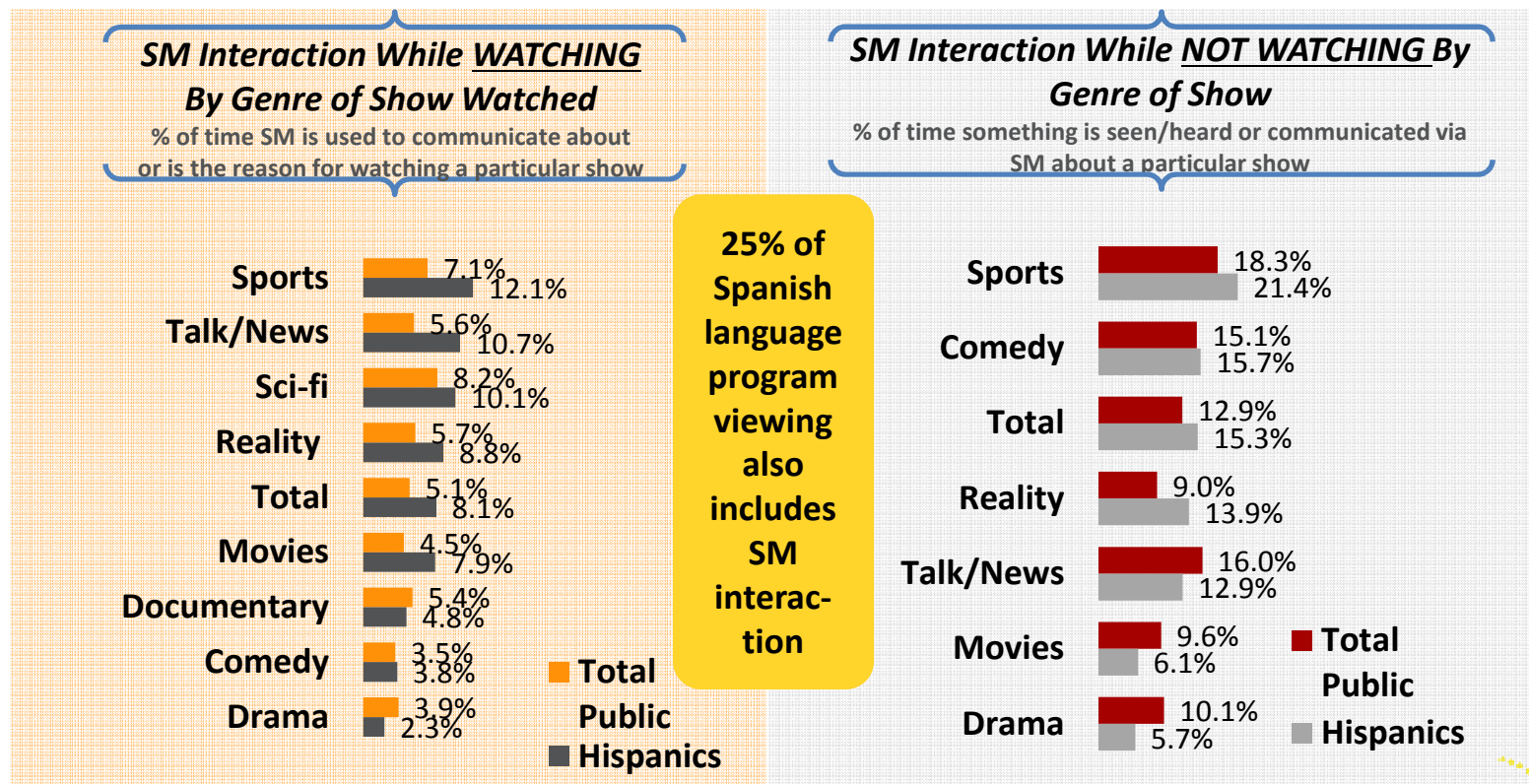
While Not Watching, SM Used to Recommend & Discuss News, Remind for Sports, and Share “Liking” for Reality & Entertainment

While Not Watching:

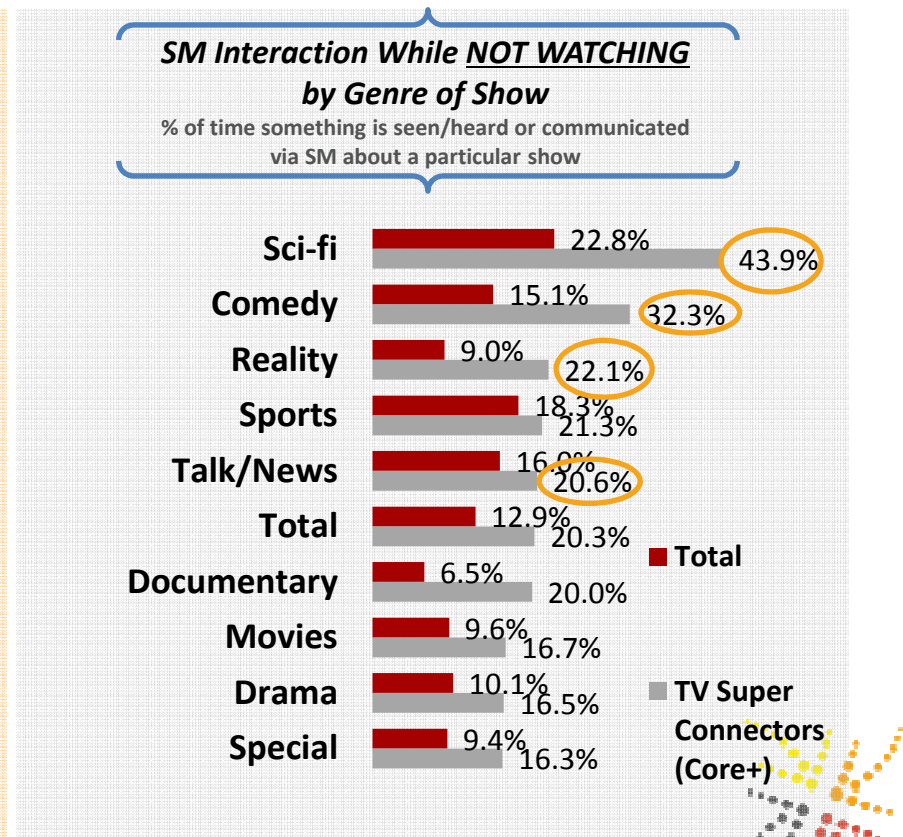
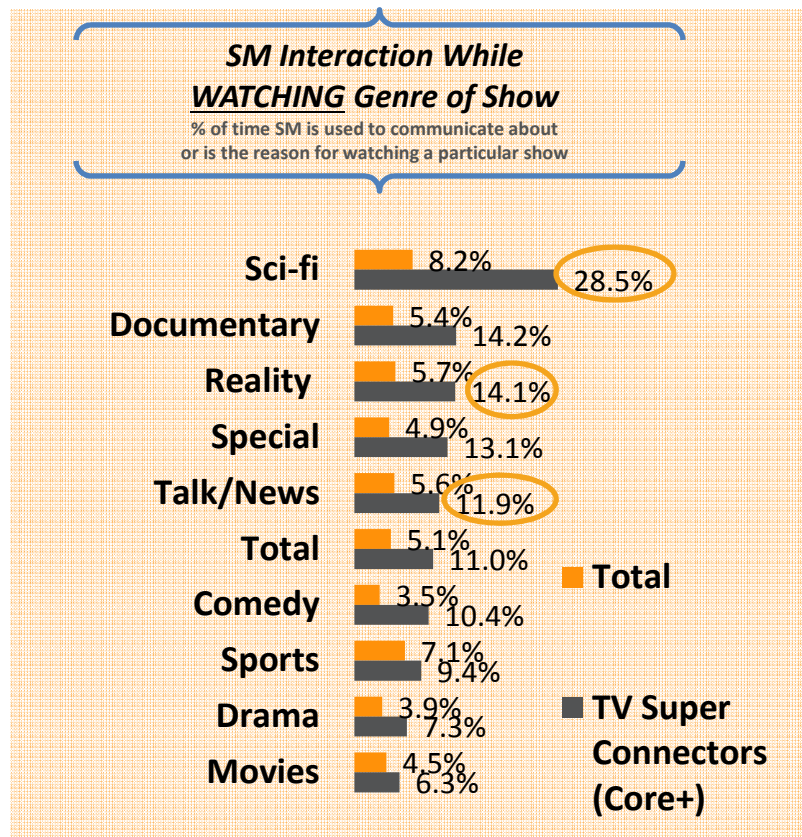
- **Sports** conversations most likely to be a reminder about a show/game
- **Reality** show conversations focus most on liking the show
- Other **scripted show** conversations also often about liking the show
- **Drama** SM most likely to anticipate what’s happening next
- Plans to watch comes up during SM about **Reality** most often
- Specific actors are more likely to be mentioned in **Drama** SM
- **Late Local News** SM more often about watching something else



Hispanics are More Likely to Involve Social Media When Interacting with Most Genres, Led by Sports Programming



TV Super Connectors More Likely to Interact with SM about Most Genres; Sci-fi, Comedy, Reality & Documentary Stand Out Most





Summary of Key Findings

Summary of Key Findings

- **Traditional drivers of TV program choice still dominant**
 - Appointment viewing, happenstance, inertia, TV promos more critical than social media
 - In person still most popular form of communication about TV
- **Social media offers more potential than current impact would indicate**
 - Only 1.5% of viewing occasions are determined by social media (self-reported)
 - For new shows, social media helps to lead to viewership 6% of the time;
 - On a daily basis, 12% use social media re TV
 - 37% use SM on a weekly basis



Key Findings (Cont'd)

- **Impact of social media varies by genre**
 - Sci-fi, Sports, and Talk/News associated with most social media interaction
 - Use of social media for Reality TV above average while watching, below average before/after viewing; Comedies follow an opposite pattern
- **Hispanics are the most engaged demographic group re: SM**
 - 18-24s among the most engaged while watching, below average while not watching



TV Super Connectors

- **TV Super Connectors are more engaged with SM than the total public by a factor of about 2-3x**
- **TV Super Connectors skew young and female**
 - But there is representation from both genders and across all age groups
- **It's important to keep in mind the role that SM plays**
 - Communication about TV is much more likely to occur through other channels than through SM, even for Super Connectors
 - Among Super Connectors SM is far more utilized than it is in general, but it's a matter of "degree, not kind"





ETHNOGRAPHY

Nielsen Life360

Part II



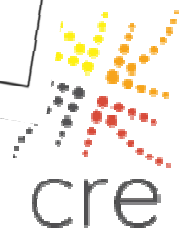
Life360 Mobile Ethnography

- **Phase 2 Mobile: Sample selected from Quant phase**
 - Primarily based on heaviest social media users from diaries
 - “Core” and “Medium” Connectors
 - Additional sample based on screener questions
- **Result is a group of leading edge Social Media/TV users**
 - 219 participants
- **Six times daily for up to 7 days, participants charted their “Day in the Life” media and technology use via mobile app**
 - Recorded any social media activity + devices and platforms
 - Alarms at 10 am, 1 pm, 4 pm, 7 pm, 9 pm, & 11 pm
 - Ask past 60 min activity and expectations for next 60 min



Life360 Video Ethnography

- 40 Panelists
- Respondents recruited from Phase 1 after demonstrating they use social media to engage with TV topics
- Panelists were sent a small video camera and dedicated Study Guide of specific tasks/topics to record for 7 days



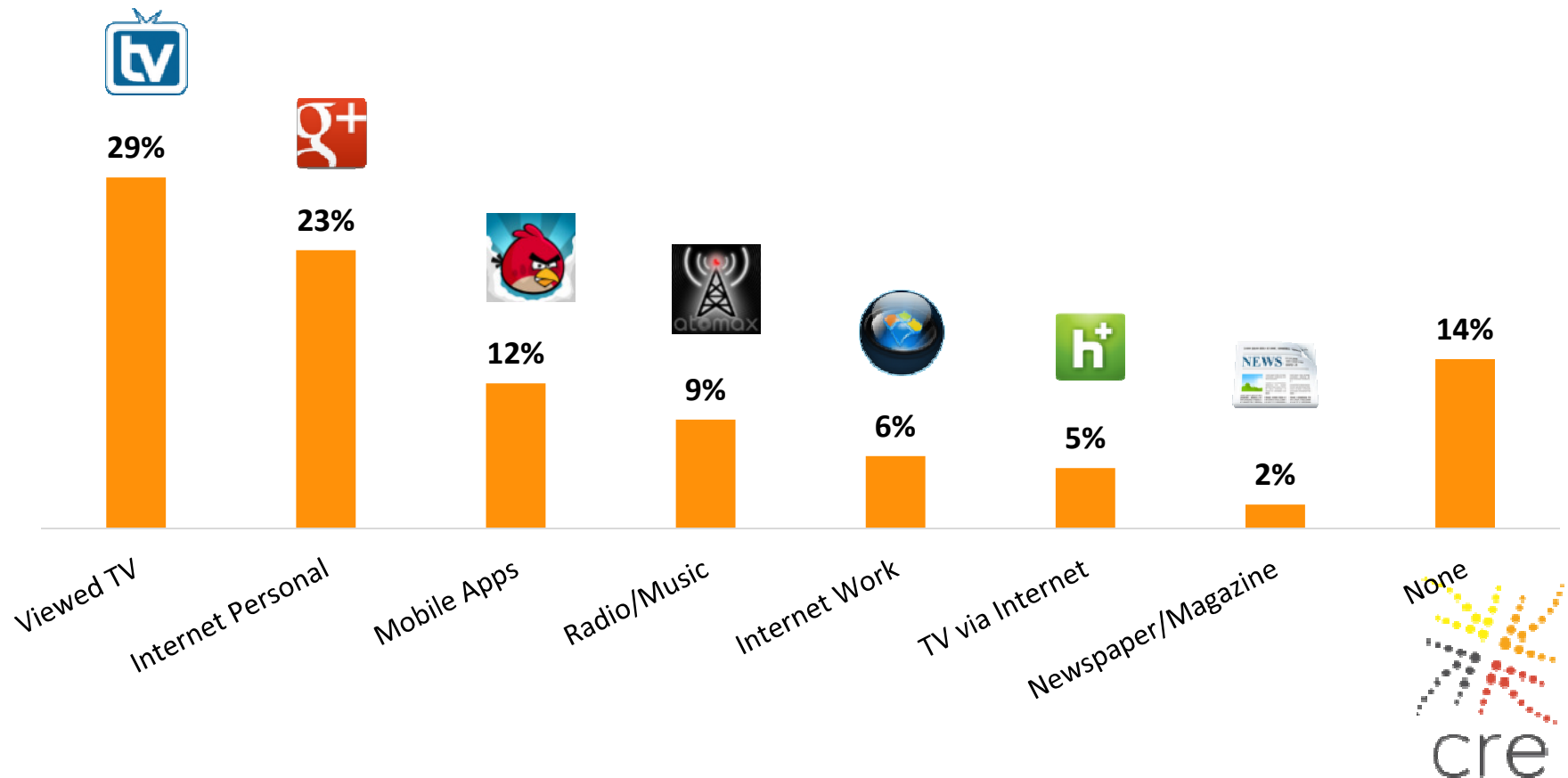
“Day in the Life” - Media & Technology



Key Learnings

Distribution of Activities – Phase 2

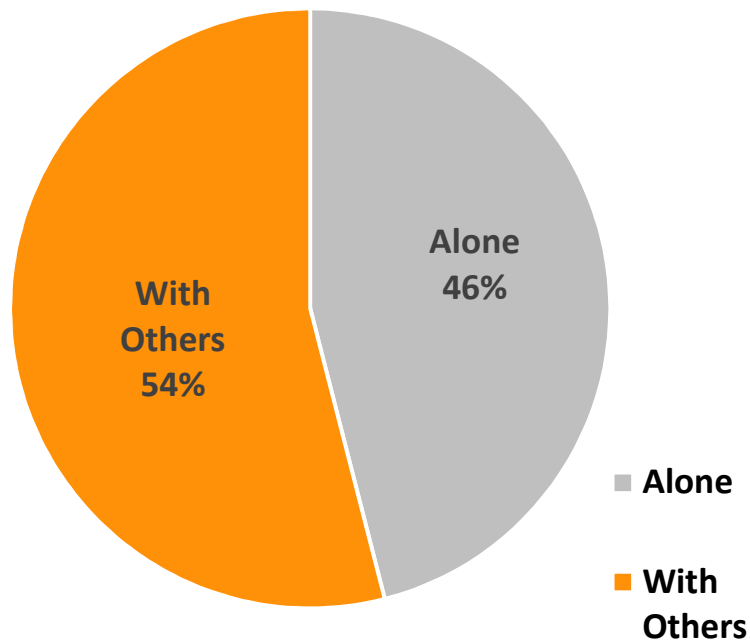
TV viewing accounted for more than 1/3 of all responses



Viewing With Others is Not a Barrier to Engaging via Social Media

[219] Moderate to Heavy Social Media Users – Nielsen Life360 Phase II

TV with related Social Media Usage

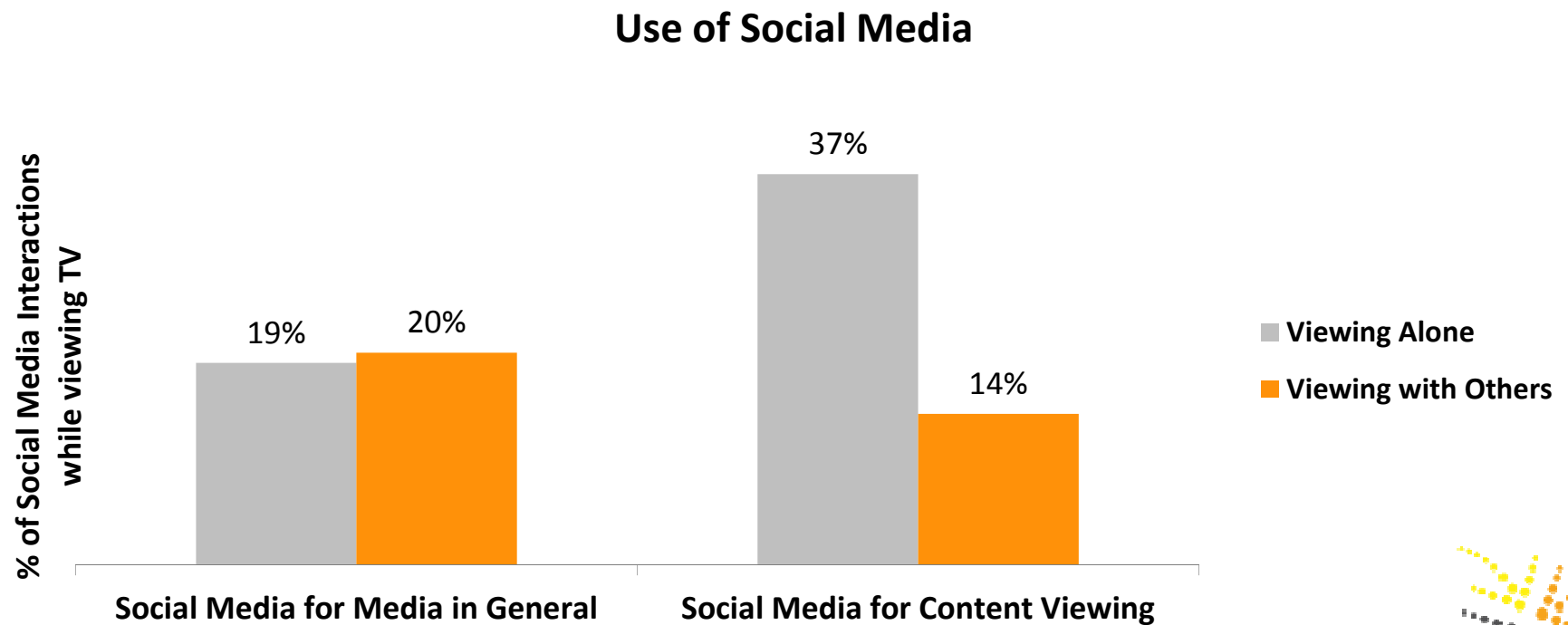


- Over half of all SM usage occurs simultaneously with co-viewing activity



While Alone, People are More Likely Interacting with Content They're Viewing

[219] Moderate to Heavy Social Media Users – Nielsen Life360 Phase II

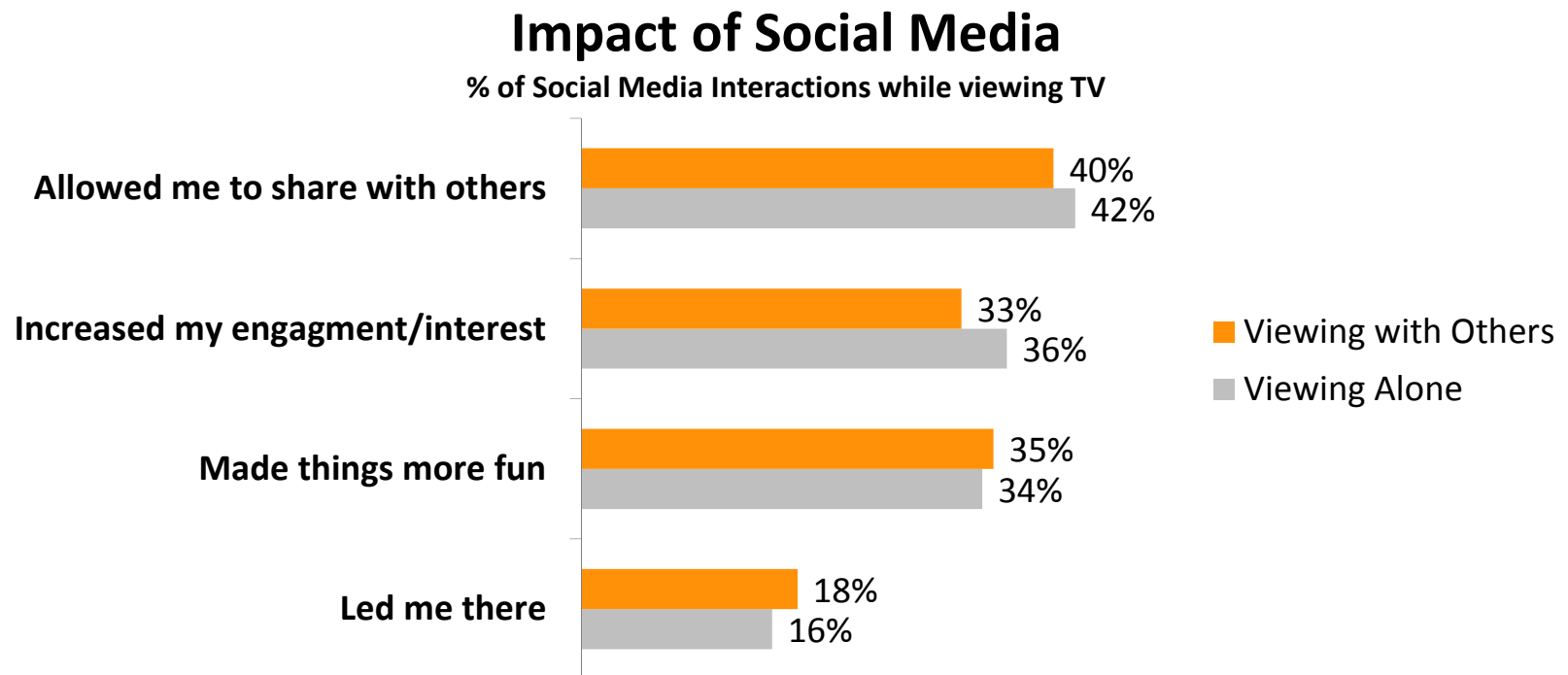


What Do People Get Out of Using Social Media with TV?



Social Media has a Similar Impact on TV Viewing, Whether Alone or with Others

[219] Moderate to Heavy Social Media Users – Nielsen Life360 Phase II



Ethnographic View of Facebook & Twitter

- **Ease of use, convenience are key triggers of usage:**
 - Many are already fans of a show or its characters; still others are led to seek out new shows / content they've heard about
 - Facebook offers a deeper connection for respondents to interact with friends or fellow “fans” of specific shows:
 - Reality, Drama and Sports dominate discussions
 - Sneak peeks, upcoming episodes, post-show chats
- **A number of users tune into shows once a character or show ‘persona’ posts comments on Twitter.**



Why Do They Use... ?



Conclusions

- People do a lot of other things while they watch TV — they are **usually online** and a sizeable portion engage with **mobile** and **social media**
- **Heavy users** watch more TV overall, across genres
- Social media use while watching TV is still **dominated by posts** (reading and writing) compared to interacting with media content
- Social media use is less likely to happen when viewing takes place **away from home**



Conclusions

- Social media usage occurs whether people are viewing alone or viewing with other people in the room – the “**New Co-viewing**”
- Those **viewing alone** and **using social media** are much more likely to be interacting with the content they are viewing
- **Sharing opinions** is the most frequently mentioned benefit of using social media while viewing TV





SOCIAL MEDIA ANALYTICS

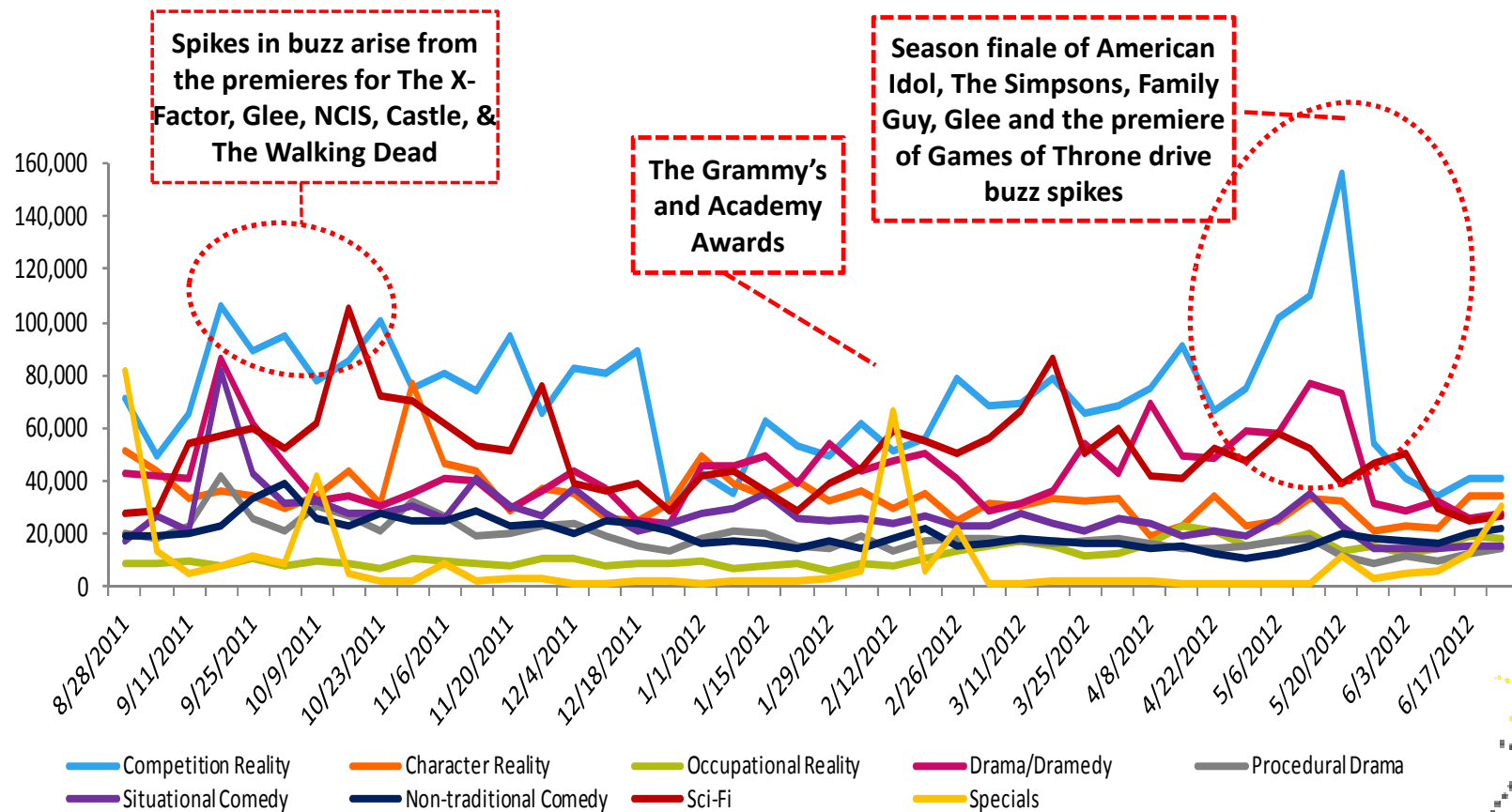
NM Incite

Part III



Buzz Increases as Viewers Anticipate and React to Season Premieres and Finales

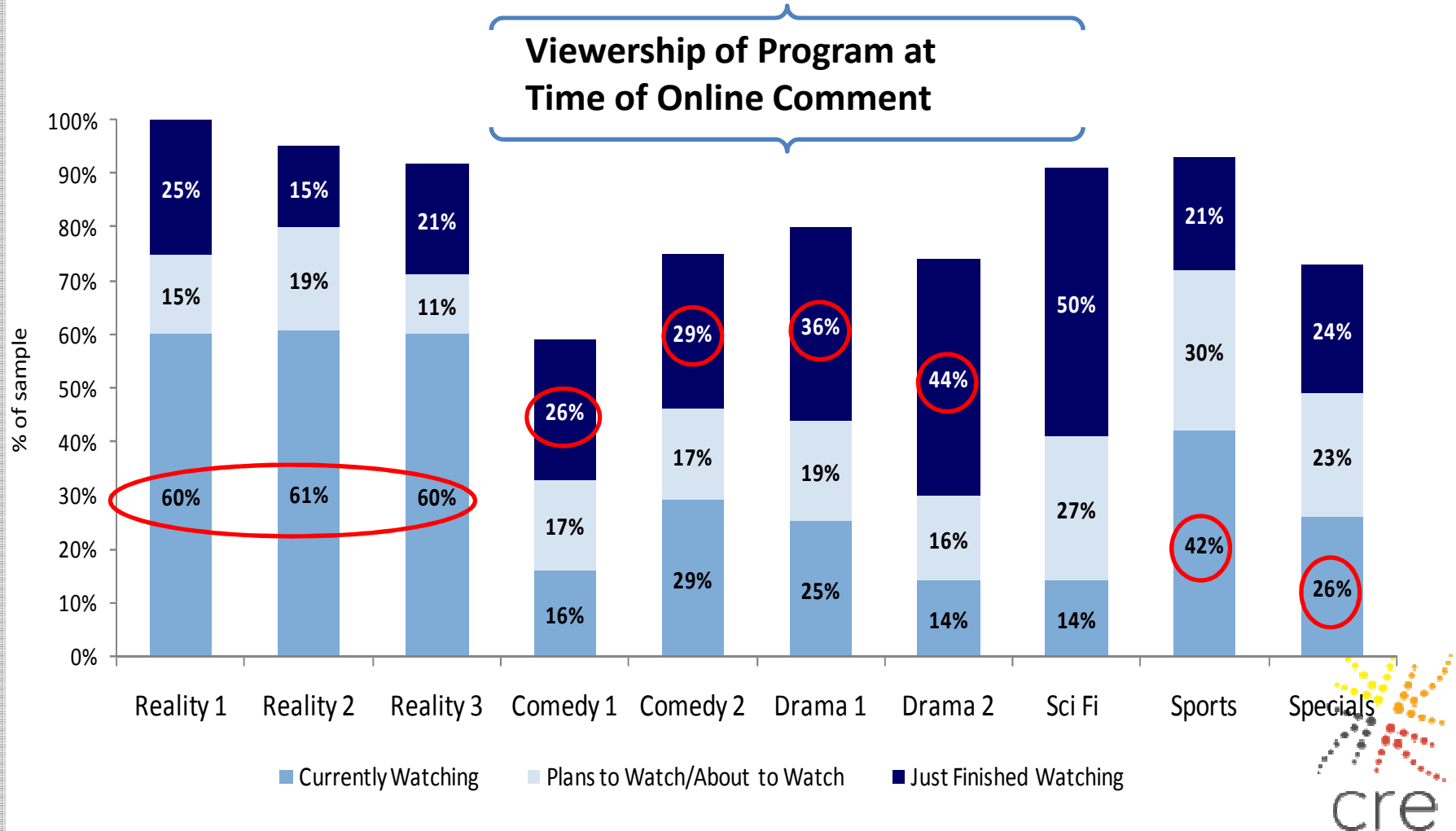
Trended Buzz Per Program Group



Trended buzz represents total messages from 10 program groups between September 1, 2011 – June 30, 2012 from publicly available blogs, boards, groups, Facebook, Twitter, video & images.

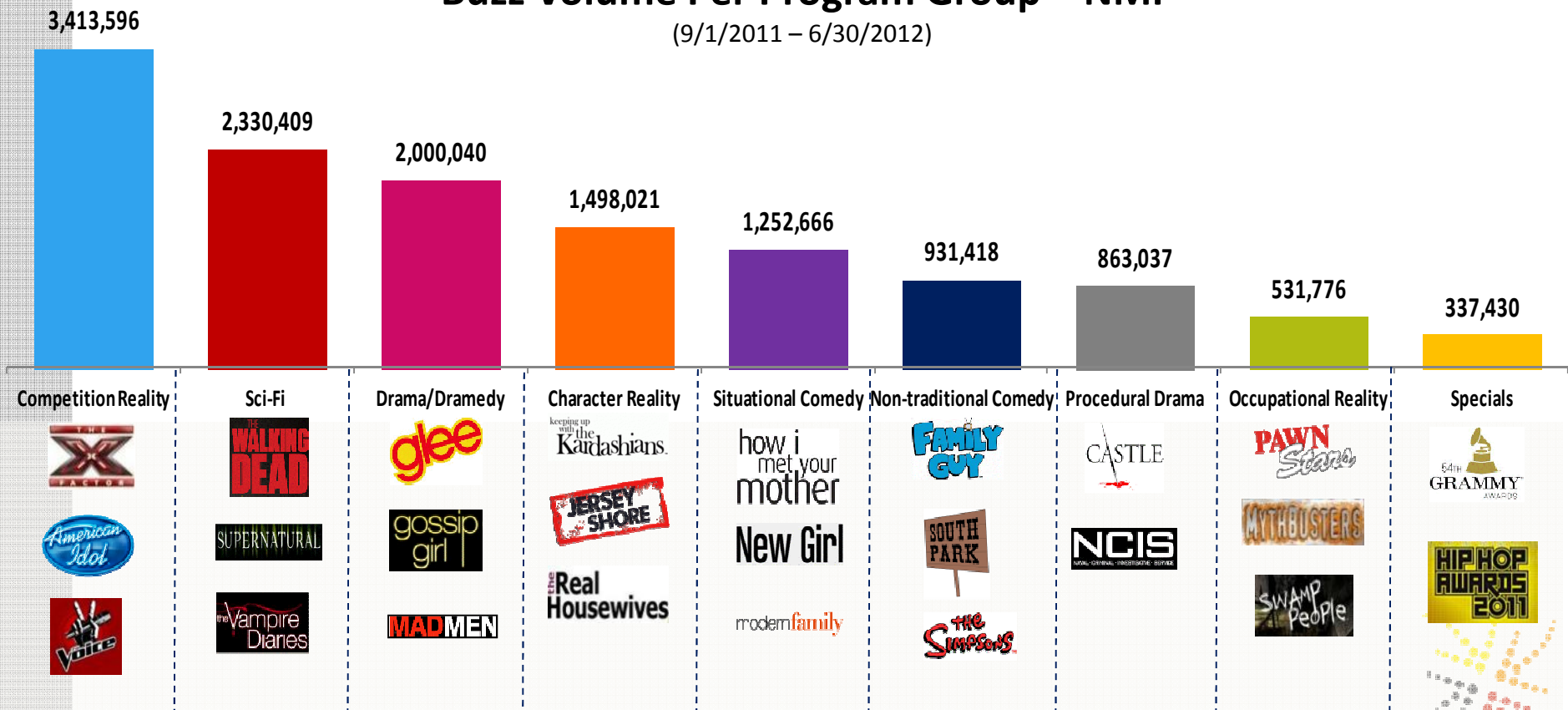


Viewers Chat Online During and After Shows; Reality & Sports Most Likely During



Television Programs Garner Significant Volumes of Conversation in Social Media

Buzz Volume Per Program Group – NMI
(9/1/2011 – 6/30/2012)



Buzz volume represents total messages from each program group between September 1, 2011 – June 30, 2012 from publicly available blogs, boards, groups, Facebook, Twitter, video & images.



Characters Evoke the Most Buzz Among Viewers

Top Discussion Drivers Per Program Group

	Competition Reality	Character Reality	Occupational Reality	Situation Comedy	Non-traditional Comedy	Drama/ Dramedy	Procedural Drama	Sci-Fi	Specials
1.	Characters (Contestants)	Characters	Characters	Characters	Comedy/ Funny	Characters	Characters	Episode	Characters (Celebrities)
2.	Voting/ Results	Plot	Plot	Comedy/ Funny	Episode	Episode	Episode	Anticipation	Performance Opinions
3.	Performance Opinions	Anticipation	Asks question	Episode	Characters	Plot	Actors/Hosts/ Judges	Characters	Nominations/ Awards (Plot)
4.	Actors/Hosts/ Judges	Episode	Anticipation	Plot	Plot	Anticipation	Plot	Plot	Anticipation
5.	Anticipation	Asks question	Episode	Actors/Hosts/ Judges	Asks question	Asks question	Anticipation	Book/ Comic Comparison	Show Comparisons

Trended buzz represents total messages from 10 program groups between September 1, 2011 – June 30, 2012 from publicly available blogs, boards, groups, Facebook, Twitter, video & images.



Academic Team Analysis

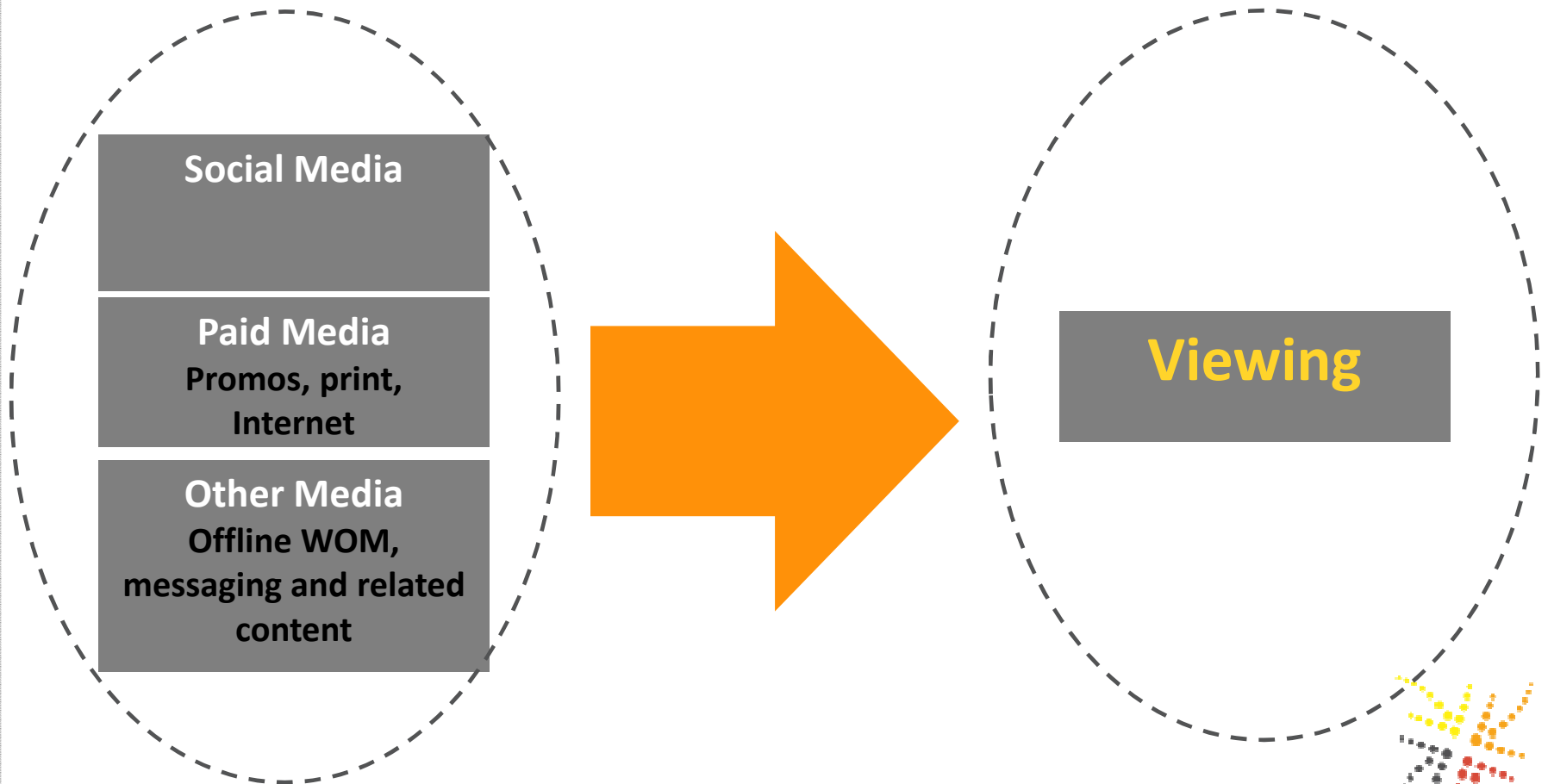
Part IV



The Jerusalem School of
Business Administration
Founded by Daniel and Raphael Recanat!



The Relative Impact of Social Media on TV Viewing



Motivation and Recap on Effect of Social Media

Thus far: Analysis on watchers

- Stated reasons for watching, not the actual reported pre-viewing actions
- Only from those who watched
- What about those who didn't watch?
 - Need to understand how social media helps drive the decision to watch...

Why did you watch this show?



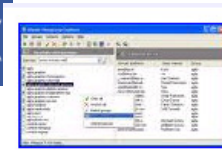
Watched

Did not watch

What are you doing now?

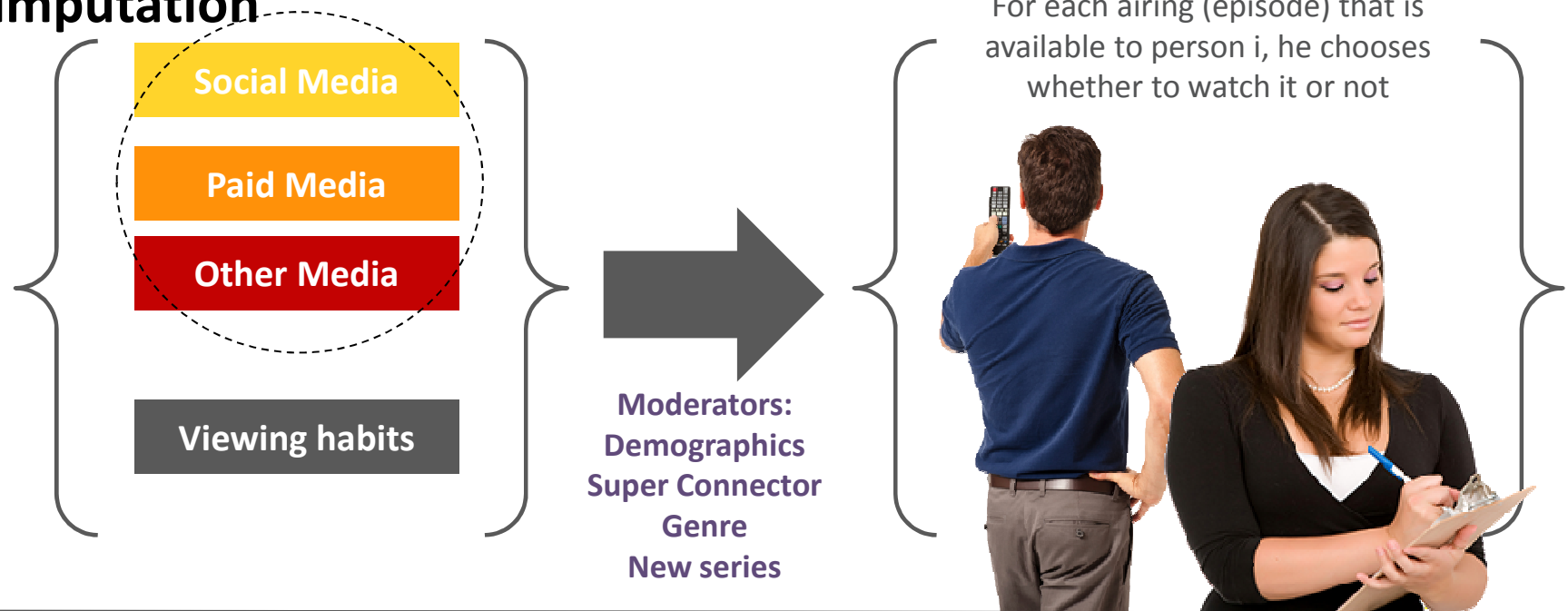
twitter

facebook



Our Approach – Choice Modeling

Hierarchical Bayesian analysis with Bayesian multiple imputation



The formula:

$$p(w_{i,j}, c_{i,c(j)} | X_{i,j}, X_i) = p(w_{i,j} | c_{i,c(j)}, X_{i,j}, X_i) p(c_{i,c(j)} | X_i)$$

Our Data Sources

Over 1000 research assistance hours before the analysis could be done
 Altogether over 3,000,000 observations (~11,000 airings, 1700 respondents)

Exposure to social media on the show at $t < T$

The promos in other shows for program at $t < T$

Exposure to word of mouth on the show at $t < T$

Regular/occasional/random viewers of the show;

Engagement in TV talking;
 Engagement in Social Media on TV

Social Media

Paid Media

Other Media

Viewing habits



Moderators:
 Demographic
 Super Connector
 Genre
 New series

For each airing (episode), that is available to person i , he chooses whether to watch it or not



What programs/channels are available to watch?
 Census 5% migration estimates
 Nielsen Universe Estimates



Key Segments: Repeaters and Infrequents

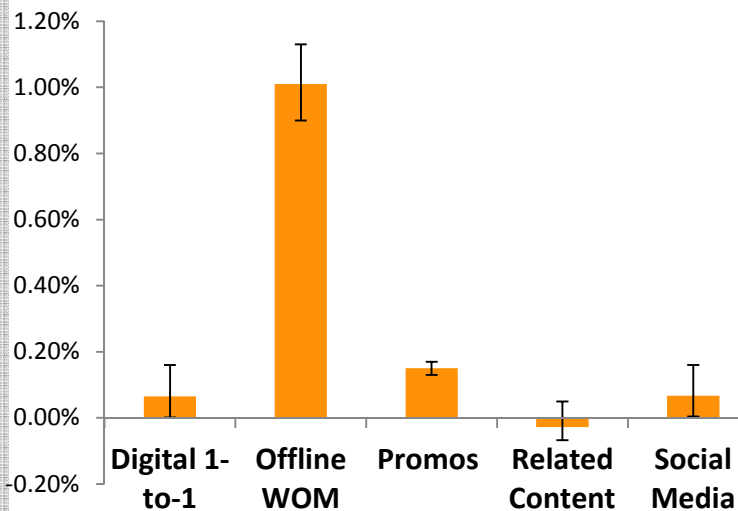
- **Definitions:**
 - **Repeaters:** those that indicated watching regularly or occasionally for a show
 - **Infrequents:** those that are not Repeaters for a show
- **Importance:**
 - Repeaters and Infrequents are likely to **respond differently** to ads, social media, and word-of-mouth because their preferences are well formed (and relatively high) for the show
 - If we don't **control for these differences** we will get the wrong effects!



Key Findings – The Direct Effect of Media Encounters

The overall average percentage point gain in probability of watching for one more encounter/exposure*

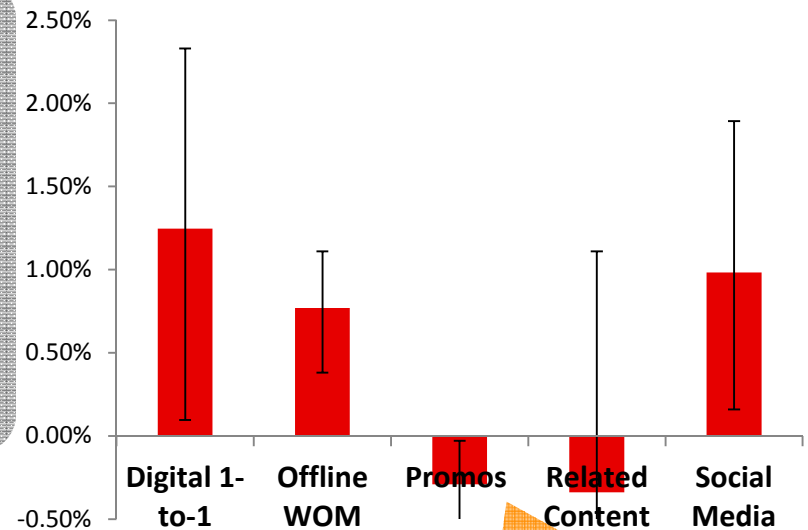
Infrequents



Implication:
Social media
may have a
stronger role
in building
on-going
viewership
than
drawing new
viewers

1. Offline word-of-mouth (5-10 times stronger)
2. Show promos
3. Social media
4. Digital 1-to-1

Repeaters

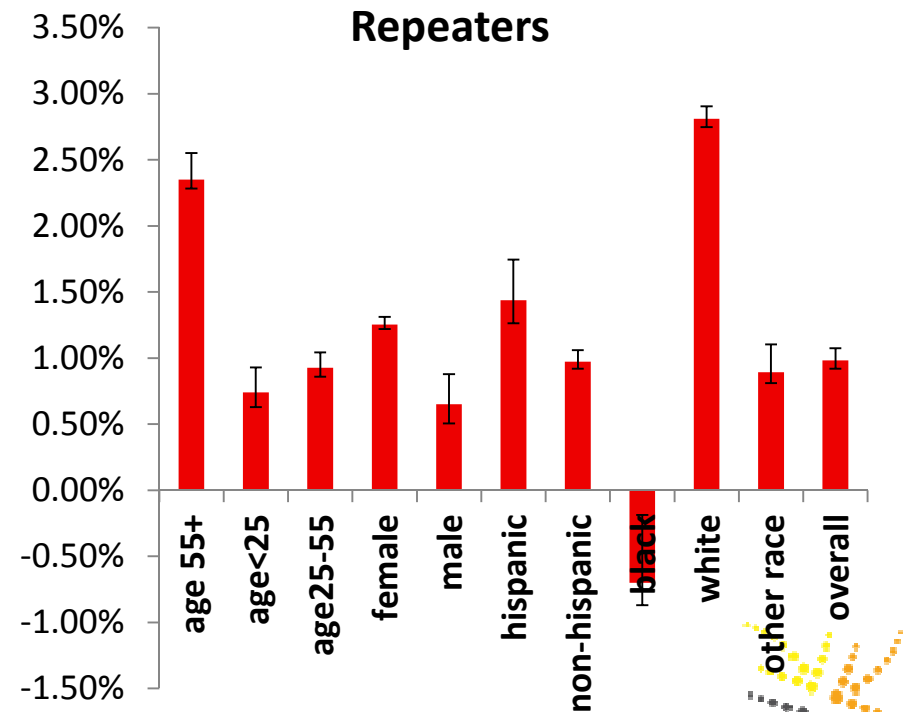
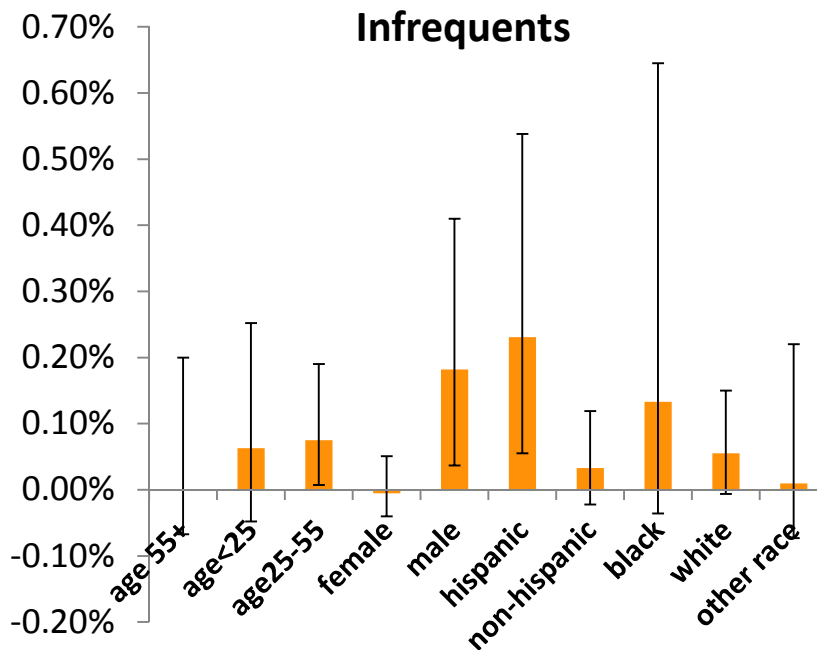


1. Digital 1-to-1
2. Social media
3. Offline word-of-mouth
4. The effect of promos can be negative



Influence Depends on Demographics – Social Media

The overall average percentage point gain in probability of watching for one more encounter/exposure

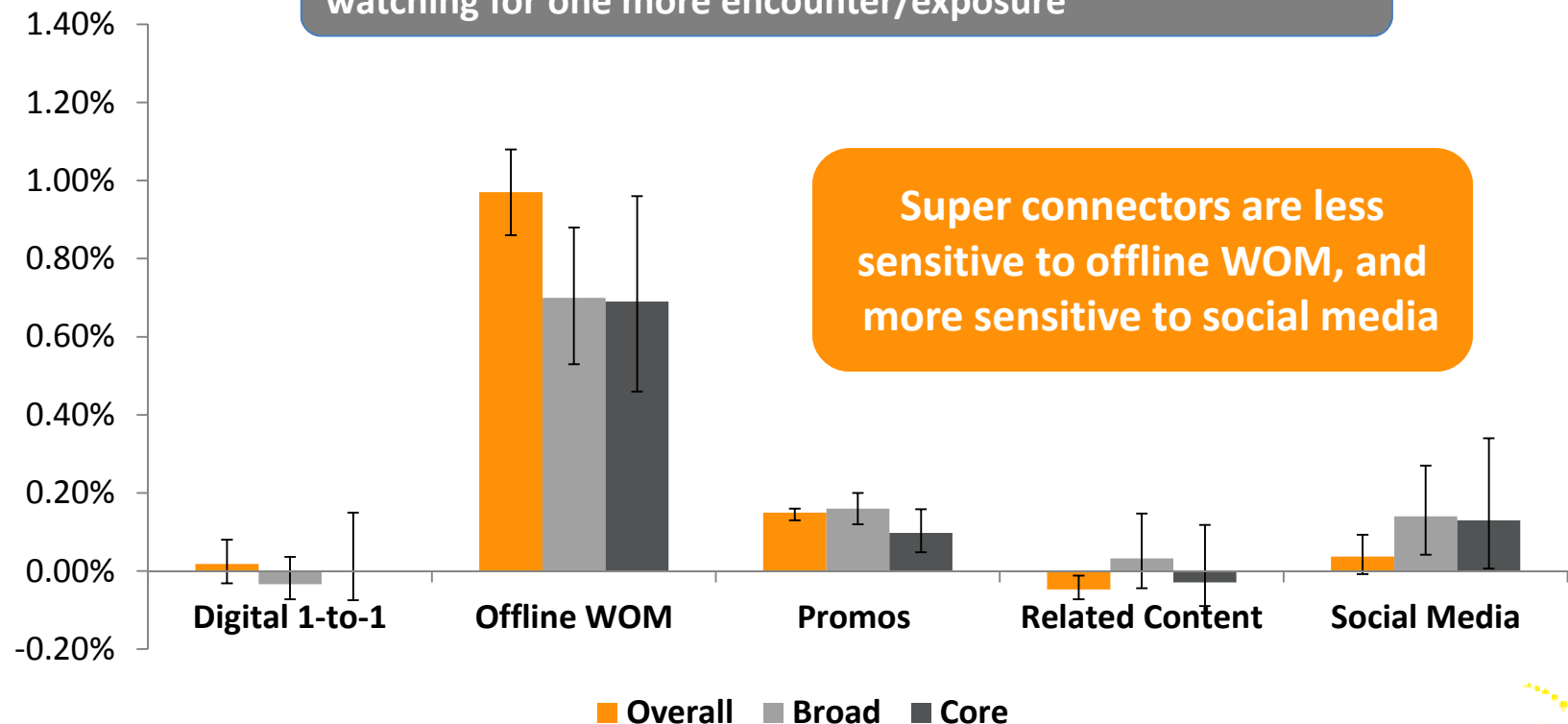


Repeaters – Social media is strong for repeaters. Especially over 55 And white.
Infrequents – The effect of social media is strong for Hispanics, males, and blacks.



Are Super Connectors Different? – Infrequents

The overall average percentage point gain in probability of watching for one more encounter/exposure



Implication:
When sampling programs, Super Connectors weigh social media more and offline less



Key Findings – The Direct Effect Of Media Encounters

Two distinct types of viewers: Repeaters and Infrequents

Social media is a top influencer for Repeaters, but a minor influencer for Infrequents



1. Digital 1-to-1
2. Social media
3. Offline word-of-mouth

The effect of promos can be negative

Implication: Social media may have a stronger role in building on-going viewership than drawing new viewers

Repeaters

Watches the show regularly or occasionally



1. Offline word-of-mouth (5-10 times stronger)
2. Show promos
3. Social media
4. Digital 1-to-1

Demographics, genre, and super connector differences can be dramatic!

Infrequents

Does not normally watch the show

*Direct effect only – there might be indirect effects such as social media => offline WOM => viewing that are not incorporated here.



Talking Social TV Takeaways



Social media impact is small relative to traditional marketing and communications, but has potential to grow quickly

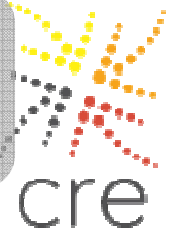
Promotion is still the strongest reason to watch a new program, social media does play a role, but is more limited

Super Connectors, 12% of the public, are highly engaged in both television and social media. They are 2-3X as likely to engage

Social media strongest for Sci-Fi, Sports and News/talk, Reality strong while watching, comedy while not watching

Mobile device ownership, on demand and on line viewing align with social media usage

Hispanics are more likely to engage in social/ TV interaction about all television genres



Full Presentation By Academic Team

- To Be Announced for July 2013



Nielsen Response to the Study

- Paul Donato, Nielsen
- Andrew Somosi, Social Guide



Q & A



Thank You



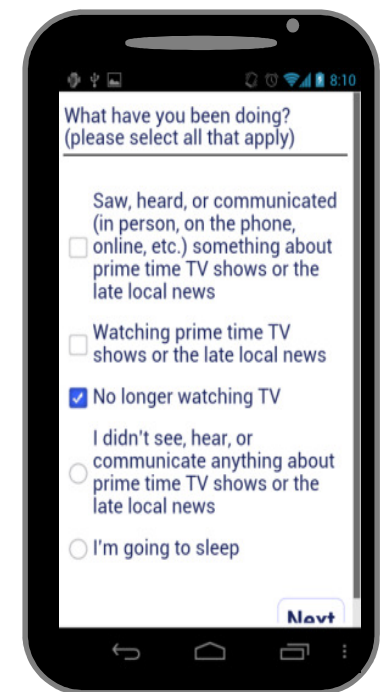


APPENDIX

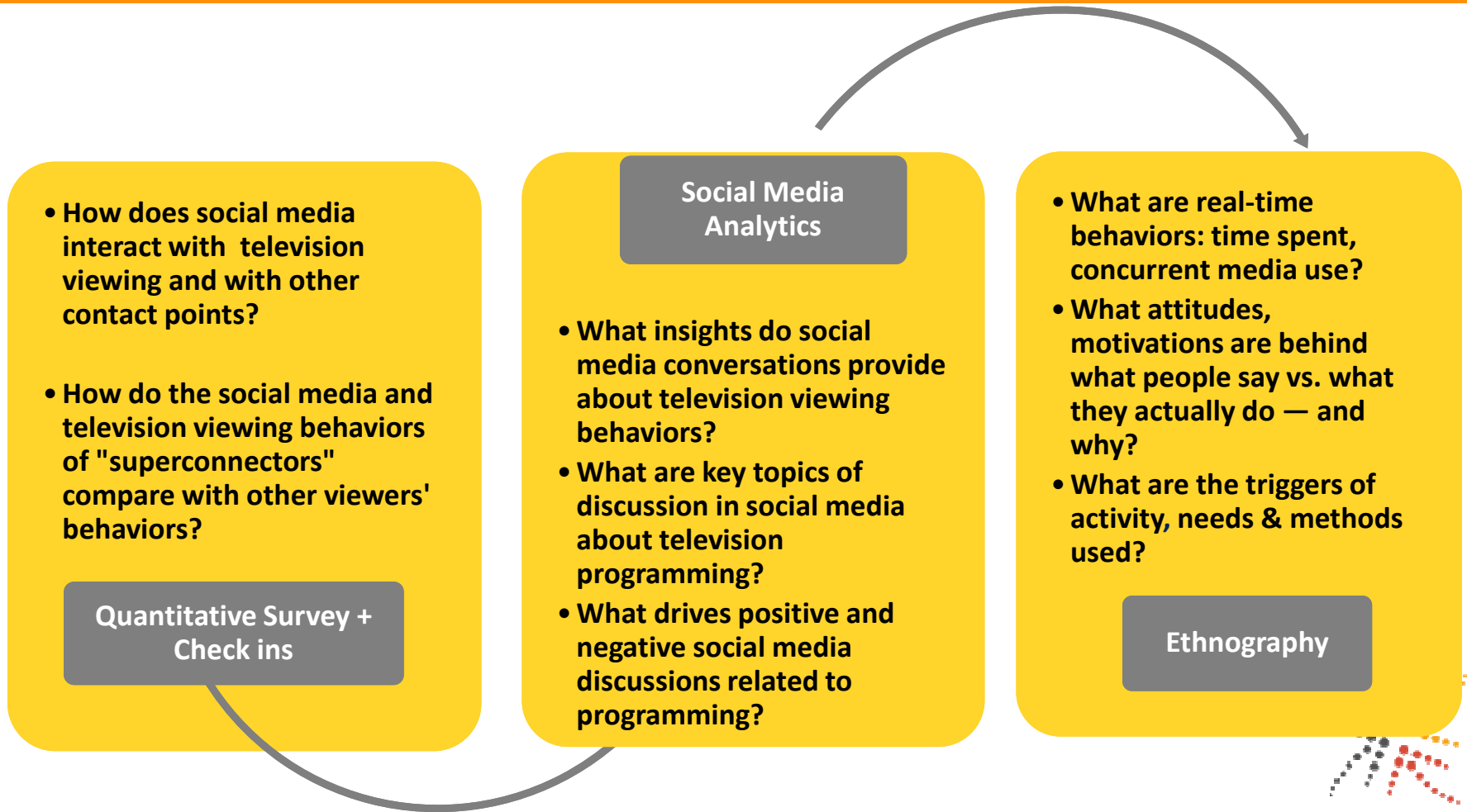
Part V

Study Fieldwork


- **Phase 1 Quant Diaries**, focused on respondent engagement with Primetime TV & Late Local News – May and June
 - 1,708 respondents from the Nielsen Online (NOL) Panel, ages 18-54
 - 104 Spanish dominant respondents
 - 7-day diaries using Life360 mobile survey app
 - Covered any viewing, communications, exposure to ads and promos
 - Self-initiated entries and reminder alarms during evening hours
- **Digital Ethnographies**
- **Phase 2 – Life360 Media & Technology Diaries – July**
 - 219 panelists logged Media & Tech usage six times daily for 7 days, via Life360 mobile survey app
 - All platforms, devices & social; photos, optional audio capture
- **Phase 3 – Life360 Video Journals - July**
 - 40 respondents recorded any social media & TV activities for 7 days



Television in the Social Media Age: Developing Understanding Through Complementary Research Methods



NMI Buzz Television Programs Per Group

Competition Reality	Character Reality	Occupational Reality	Drama/Dramedy	Procedural Drama
<ul style="list-style-type: none">➤ Project Runway➤ Top Chef➤ American Idol➤ The Voice➤ America’s Got Talent➤ Dancing With The Stars➤ The X-Factor➤ The Bachelor➤ The Apprentice➤ Survivor	<ul style="list-style-type: none">➤ Keeping Up With The Kardashians➤ Bad Girls Club➤ Jersey Shore➤ 16 & Pregnant➤ Basketball Wives➤ Love & Hip Hop➤ The Real Housewives➤ Dance Moms➤ Long Island Medium➤ House Hunters	<ul style="list-style-type: none">➤ River Monsters➤ Duck Dynasty➤ Finding Bigfoot➤ Mythbusters➤ Pawn Stars➤ Deadliest Catch➤ Man vs. Food➤ Storage Wars➤ American Pickers➤ Swamp People	<ul style="list-style-type: none">➤ Glee➤ Gossip Girl➤ The Client List➤ The Secret Life of the American Teenager➤ Hart & Dixie➤ Smash➤ Mad Men➤ Scandal➤ Revenge➤ Deglassi	<ul style="list-style-type: none">➤ Bones➤ CSI➤ NCSI➤ Law & Order: SVU➤ Franklin & Bash➤ Breakout Kings➤ Castle➤ Southland➤ Psych➤ Rizzoli & Isles
Situational Comedy		Non-traditional Comedy	Sci-Fi	Specials
<ul style="list-style-type: none">➤ 30 Rock➤ Community➤ New Girl➤ Modern Family➤ The Big Bang Theory➤ How I Met Your Mother➤ Don’t Trust the B in Apt 23➤ Tyler Perry’s House of Payne➤ Parks & Recreation➤ Men at Work		<ul style="list-style-type: none">➤ Family Guy➤ American Dad➤ South Park➤ The Simpsons➤ Tosh.O➤ Beavis and Butthead➤ That ‘70s Show➤ King of the Hill➤ Workaholics➤ Girls	<ul style="list-style-type: none">➤ American Horror Story➤ The Vampire Diaries➤ The Walking Dead➤ Grimm➤ Ghost Hunters➤ Once Upon a Time➤ Supernatural➤ Ghost Adventures➤ Fringe➤ Game of Thrones	<ul style="list-style-type: none">➤ Academy Awards➤ Emmy’s➤ Screen Actors Guild Awards➤ Nickelodeon Kids’ Choice Awards➤ ESPYS➤ Academy of Country Music Awards➤ MTV Movie Awards➤ The Grammy’s➤ BET Awards➤ Billboard Music Awards 

NOTE: THE LIST OF PROGRAMS WAS DETERMINED BY THE CRE SOCIAL MEDIA WORKING GROUP AND DELIVERED TO NM INCITE.

