



Social TV Basics

for brands and marketers

Part One

Carri Bugbee

Agenda for Part One

Social TV basics for brands and marketers: the ecosystem and opportunities

- 1. What Social TV means**
- 2. How Social TV got started**
- 3. Trends and market forces that make Social TV important for brands and marketers:**
 - A. User behaviors and consumer trends drive opportunities
 - B. New technologies bring new capabilities

Agenda for Parts Two-Three (subsequent classes)

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 - A. User behaviors and consumer trends drive opportunities
 - B. New technologies bring new capabilities
 - C. TV networks and programs embrace social media
 - D. Better measurement tools offer better targeting for marketers
 - E. Social media networks and platforms foster and exploit social TV participation
 - F. Tech and publishing titans get into the TV content business
4. **How brands and marketers can dive into social TV**

ABOUT CARRI BUGBEE

- Social TV analyst & strategist, social media marketing strategist, advertising/PR pro, writer, transmedia explorer
- Tweeter for [@PeggyOlson](#) & other *Mad Men* characters, *Shorty Award* winner
- Social media speaker/trainer and former adjunct professor of Social Media Marketing at Portland State University
- Social TV writer for *The Social Media Monthly*
- Contributing author: *The Big Book of Social Media Case Studies, Stories, Perspectives*
- Links for this class: bit.ly/socialTVclassOMI
- Social TV news archive: bit.ly/socialtvfilm
- Social media news for marketers: bit.ly/smmtrain
- Bio and other social profiles: CarriBugbee.com
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[@CarriBugbee](#)
[@socialTVtrends](#)

What is Social TV?

Let's start with a common definition

Carri's definition:

Technologies (software and hardware) and processes that enable connections and interactions between fans, content creators and distributors of video content.

Wikipedia's definition:

Social television...supports communication and social interaction in either the context of watching television or related to TV content...Social television systems can, for example, integrate voice communication, text chat, presence and context awareness, TV recommendations, ratings, or video-conferencing with the TV content either directly on the screen or by using ancillary devices

What is it really all about?

Disruption

- New technologies
- New players (social media platforms, gaming platforms, apps, streaming, ecommerce, etc.)
- New delivery models
- New consumption models
- New advertising and promotion opportunities

All have a straight or dotted line to social media activity.

How Social TV got started

TV has *always* been social



Enter the social Web



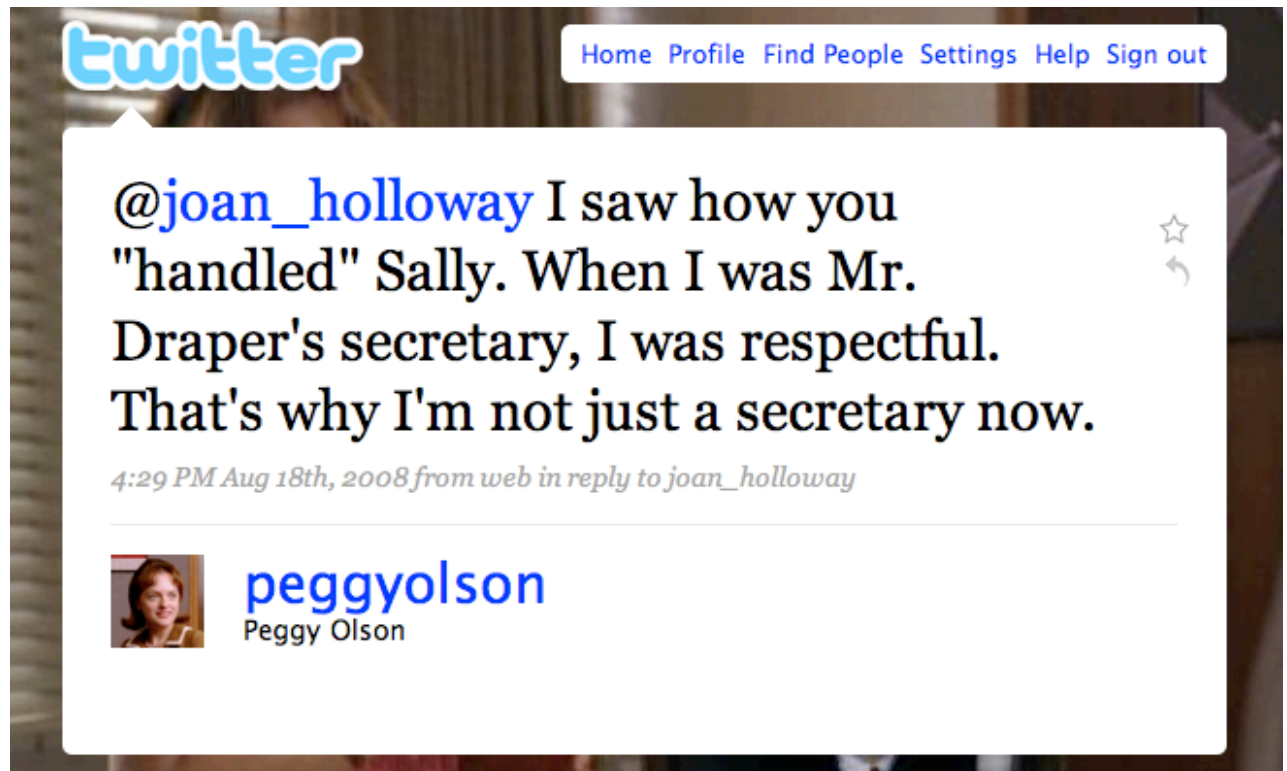
How I got into Social TV

Tweeting for @PeggyOlson

Started @PeggyOlson on Twitter in August 2008.

Entire universe of Mad Men characters quickly joined in.

Fun experiment quickly yielded valuable insights.



Mad Men fans loved it Most thought it was a “real” campaign

Wednesday, August 20, 2008

Mad Men Gets All 2.0

0
tweets

tweet



I've been a fan of **Mad Men** since the series premiered. The production values are amazing and the story lines are gripping, with some very complex characters. And I wrote about the **unique advertising model** that the show used, essentially making the ads relevant on a show about advertising in this day and age when we can skip right by commercials.

“...now it looks like the show's marketing team has stepped up the game again by really jumping into the social media space.”

AMC didn't love it, but the fans got their way.

Twitter suspended Mad Men accounts to comply with AMC's request (the network reportedly sent a DMCA take-down notice).

Accounts were restored less than 24 hours later after online backlash and bad press.



**What makes Social TV
important for brands
and marketers**

Trends driving social TV opportunities:

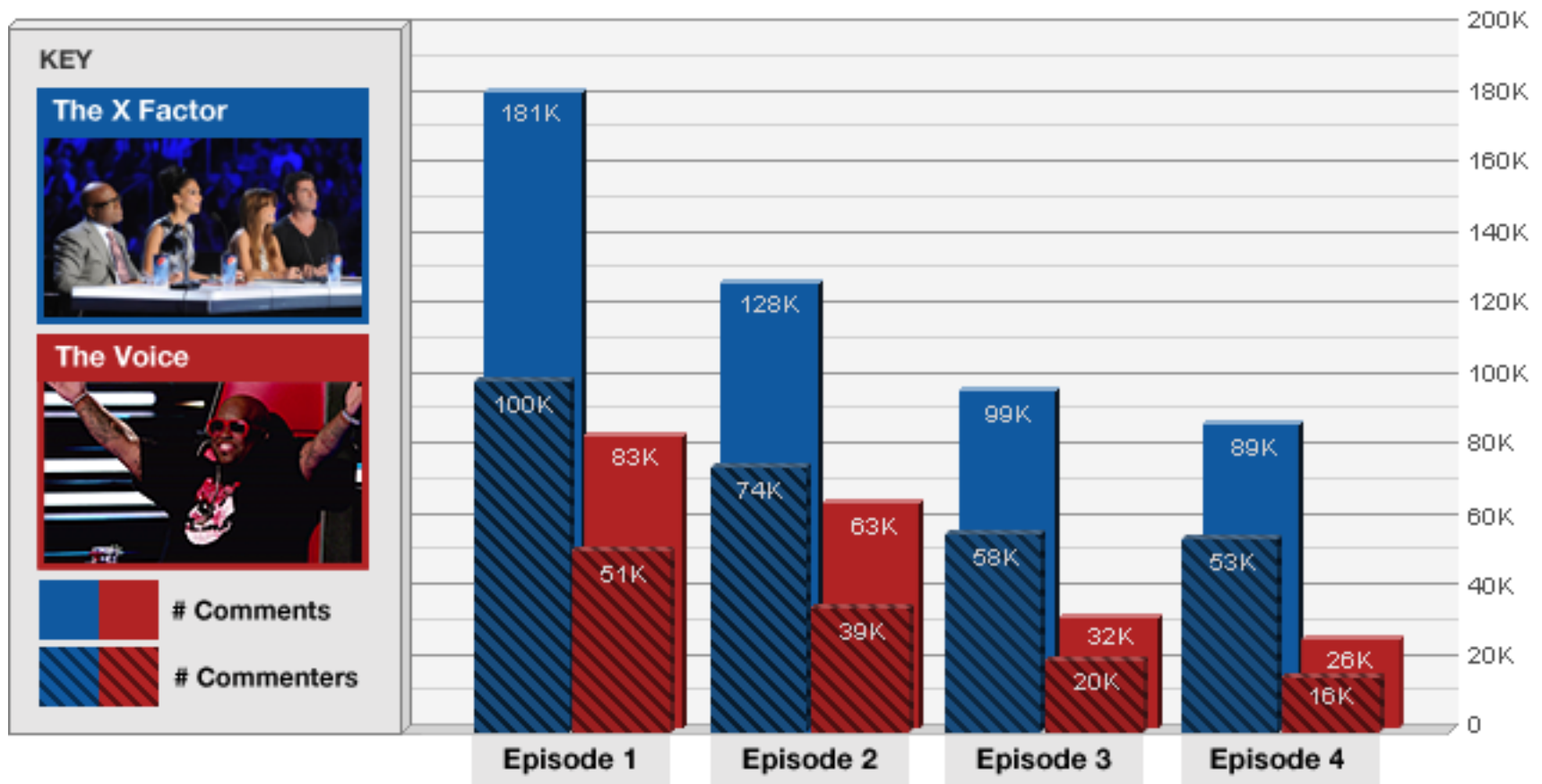
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A. User behaviors: Started as *organic* activity by fans who adapted existing tools and platforms

Twitter hashtags became the first social TV “tools”



A. User behaviors: Online buzz is now crucial for live events, but fans *started* it on their own

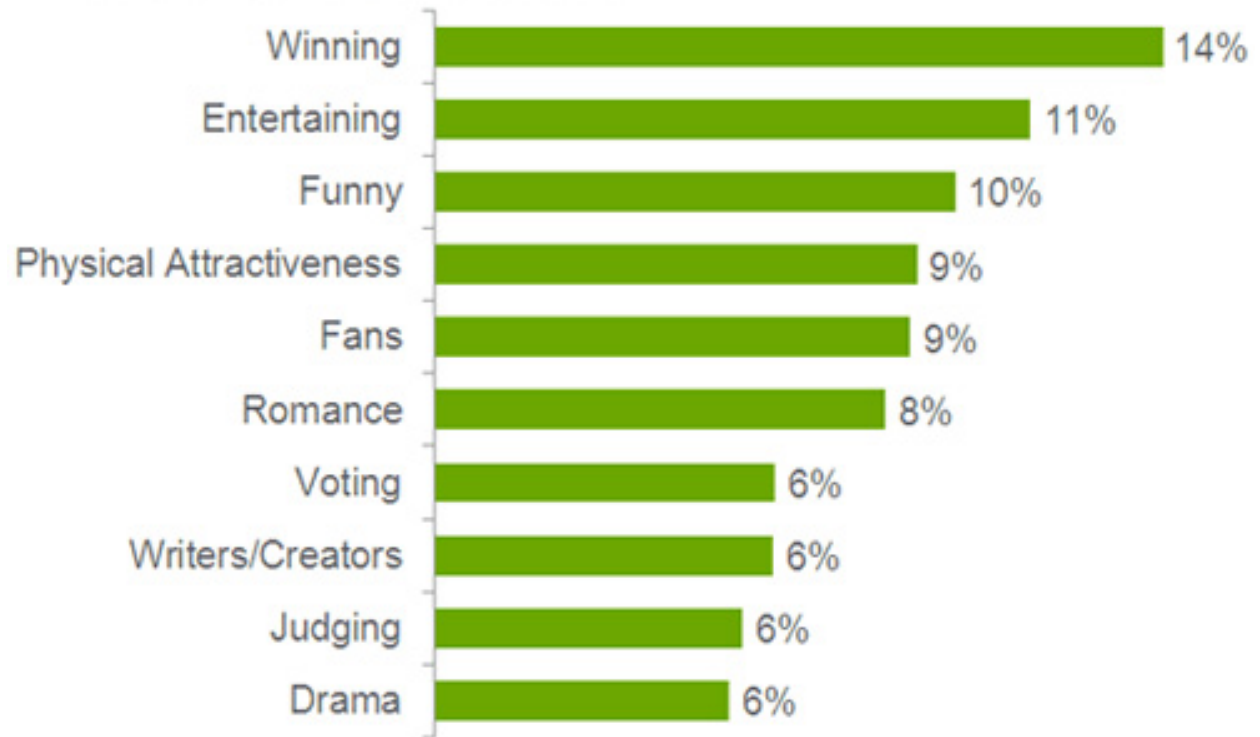


A. User behaviors: People want to *participate* in live events, not just watch them passively

Viewers are most likely to engage online during sports, contests, awards shows, and reality TV.

Dramas inspire conversation before and after the show.

What do viewers talk about?

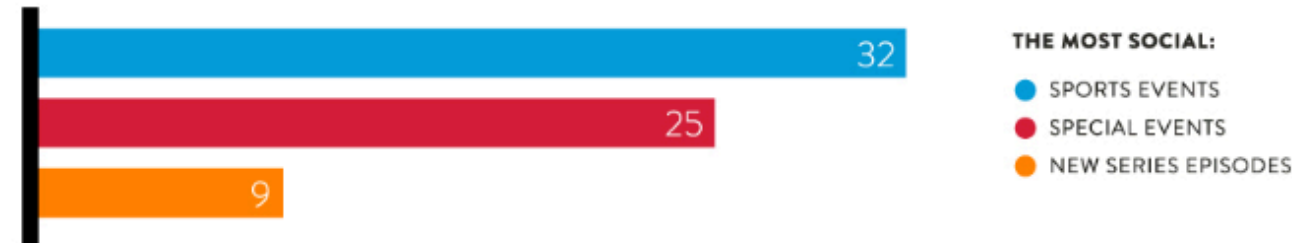


Source: NM Incite - Volume is represented as a percentage of 2,058,828 messages about the top 10 television series, posted on boards, blogs, and groups from July 1, 2009 to February 28, 2011.

A. User behaviors: Sports and live events became primary drivers of interaction around TV content.

HOW ENGAGED ARE TV AUDIENCES ON TWITTER AROUND THE MOST SOCIAL AIRINGS?

Tweets Viewed Per Person (Per Event)*



Each person saw **32** Tweets about the most social sports events and **9** for the most social special events. **SPORTS EVENTS DOMINATED TWITTER CONVERSATION ABOUT TV IN 2013.**

*Data for 9/1/13-2/16/14. Average 'Average Frequency' (Impressions/

492
MILLION

Tweets were about Sports Events in 2013

50%
OF TWEETS ABOUT TV

were about Sports Events in 2013

12
OUT OF **20**

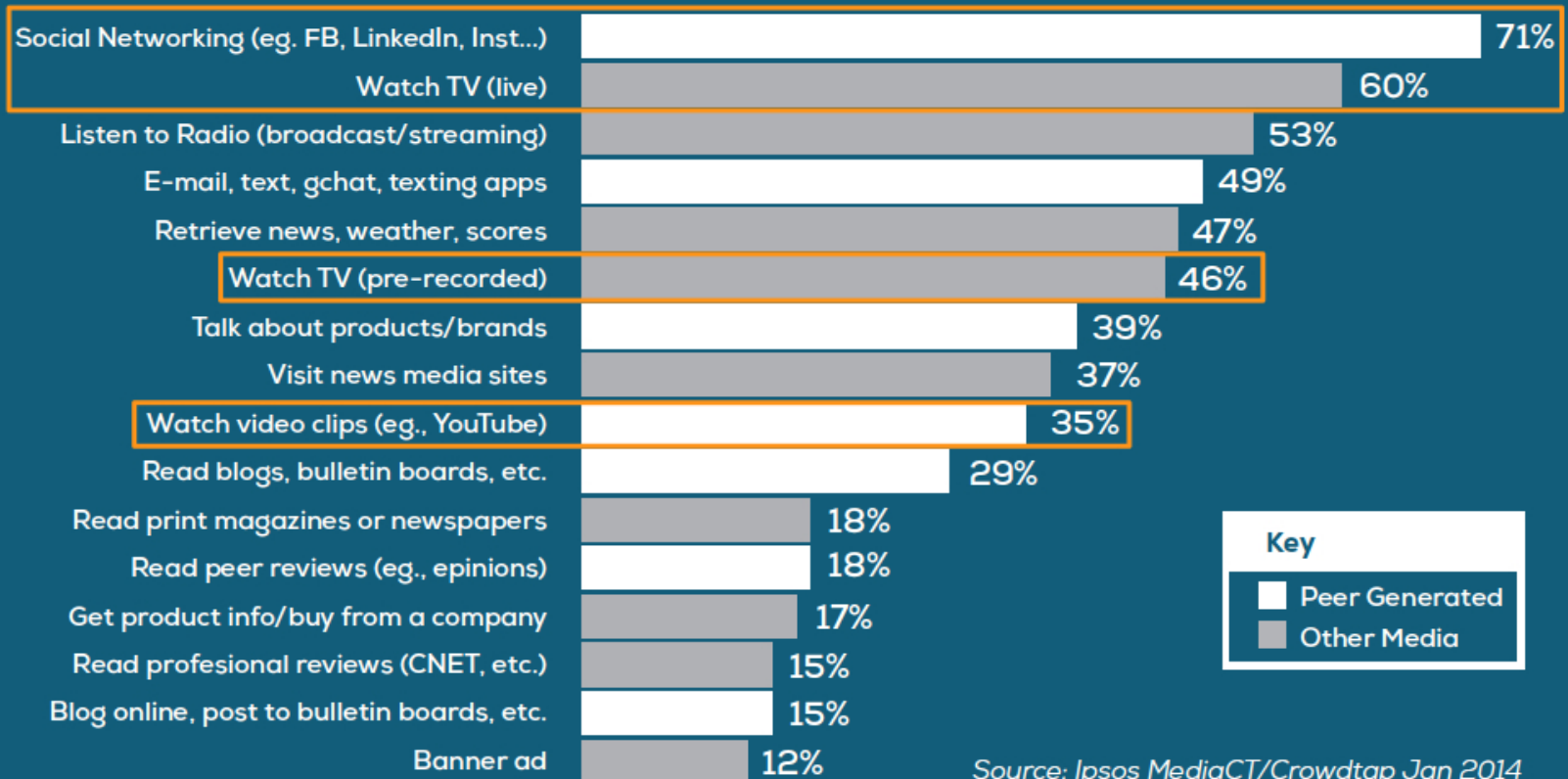
of the most-tweeted TV airings in 2013 were Sports Events

A. User behaviors: Multi-tasking millennials value UGC over TV & peer recommendations over those of brands

Millennials Prioritize Social Networking Above Other Media

Total media consumption per day: 17.8 hours

Daily Use of Media Types



Source: Ipsos MediaCT/Crowdtap Jan 2014

A. User behaviors: 15%-17% of viewers socialize online *about* TV shows while watching

Comparative Estimates: Simultaneous Social Media Usage While Watching TV According to US TV Viewers, 2013

% of respondents

	2013	Activity	Survey base
CreditDonkey, March 2013	83.7%	Use Facebook	Social media users
CreditDonkey, March 2013	66.9%	Use Twitter	Social media users
re:fuel, June 2013	63.0%	Use Facebook or Twitter	College student internet users*
Nielsen, June 2013	53.0%	Visit a social network	Tablet owners
Nielsen, June 2013	52.0%	Visit a social network	Smartphone owners
Ipsos Mendelsohn, Feb 2013	51.0%	Use Facebook, Twitter or other almost constantly, regularly or occasionally	Affluent internet users**
Jacobs Media, May 2013	46.3%	Use social media frequently or occasionally	Internet users

Note: *ages 18-34; **annual household incomes of \$100,000+

Source: various, as noted, 2013

162818

www.eMarketer.com

Comparative Estimates: Social Media Activities Performed While Watching a Program According to US TV Viewers, 2013

% of respondents

	2013	Activity	Survey base
Nielsen, June 2013	21.0%	Read conversations about a program on social network	Tablet owners
Nielsen, June 2013	18.0%	Read conversations about a program on social network	Smartphone owners
HUB Research*, April 2013	17.0%	Read comments on Facebook or Twitter about show	TV viewers
HUB Research*, April 2013	17.0%	Posted comments on Facebook or Twitter about show	TV viewers
The NPD Group, April 2013	14.8%	Discussed show on social network	TV viewers
Nielsen, June 2013	13.0%	Write blurbs on the program you are watching	Tablet owners
The NPD Group, April 2013	9.4%	Followed stream of comments	TV viewers
Nielsen, June 2013	8.0%	Write blurbs on the program you are watching	Smartphone owners

Note: *ages 16-64

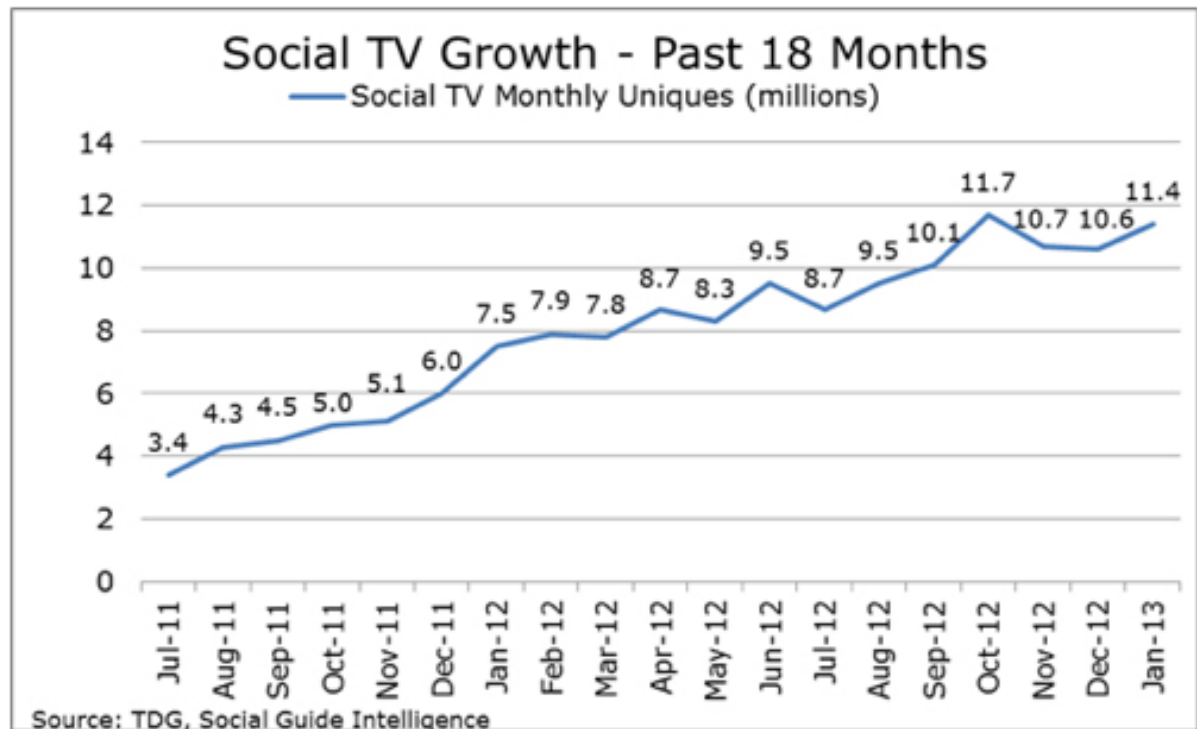
Source: various, as noted, 2013

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www.eMarketer.com

A. User behaviors: Social TV activity is growing and participants are influential

1. Average social TV user has 500+ Twitter followers, giving them outsized influence.
2. Altering TV from a passive consumption medium to a new kind of community experience.
3. Mainstream media repeat and amplify the reactions of social TV viewers,



A. User behaviors:

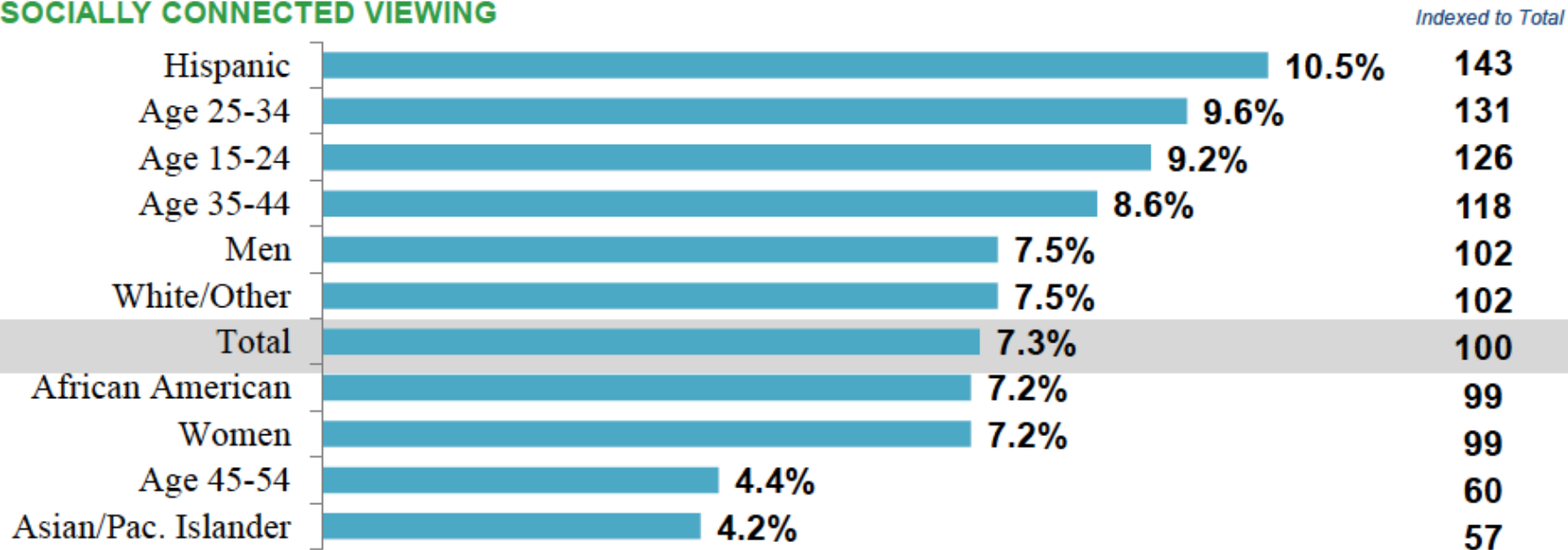
Hispanics & women 25-34 over-index for social TV

- 19.1% of online Americans ages 15-54 are reached by social media at least once a day regarding primetime TV.
- 11.4% of primetime viewers use Facebook and 3.3% user Twitter, but Twitter is more often related to the show being watched in the moment.

DEMOGRAPHIC DIFFERENCES



SOCIALLY CONNECTED VIEWING



A. User behaviors: Youngsters have a different concept of “TV”

1. Many consider Youtube to be “TV” in same way as broadcast or cable programming.
2. Teens prefer online video because it’s **interactive, communal and tailored to their interests.**
3. TV networks stream many programs online (often free).
4. Online audiences are international.
5. Children get mobile devices at younger and younger ages.

By KIM PETERSON / MONEYWATCH / April 15, 2014, 8:18 AM

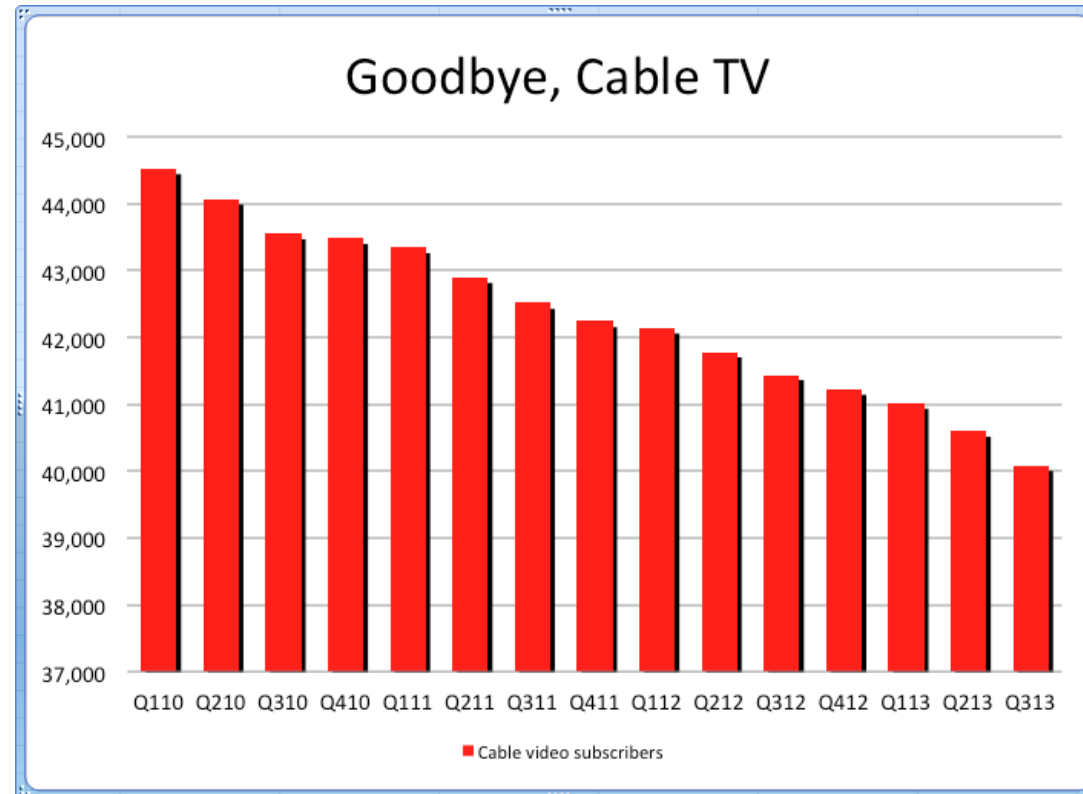
Why Hollywood is cozying up to a YouTube filmmaker



Creator Freddie Wong (R) and director/writer Matt Arnold attend the "Video Game High School" season two premiere party at YouTube Space LA on July 24, 2013, in Los Angeles. / CHELSEA LAUREN/GETTY IMAGES FOR COLLECTIVE DIGITAL STUDIO

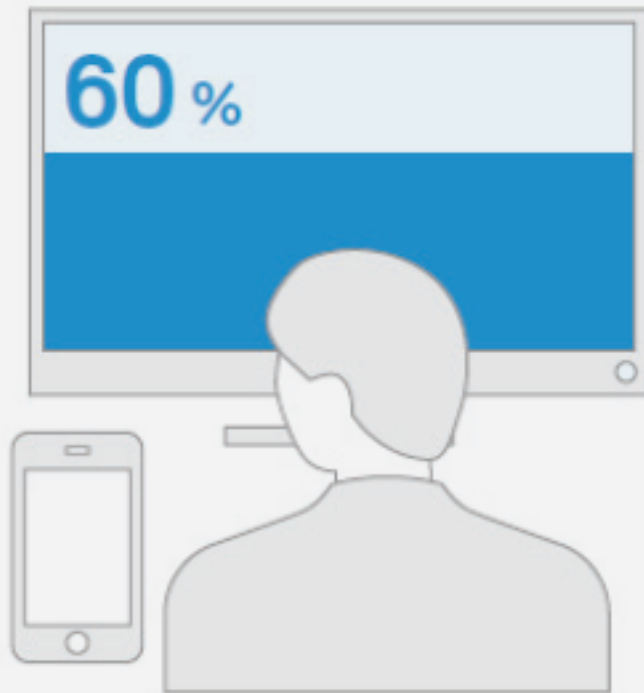
A. User behaviors: Cord-cutting is real & “cord nevers” are growing

- 6.5% of U.S. households have cut the cord—up 44% in the past three years. Ownership of an iPhone or iPad “increases the odds.” —Experian
- Many college students have weaned themselves off cable for good. - *Slate*
- Some adopted TV watching over the Internet because they got their first taste of economic independence in the recession – *Bloomberg*



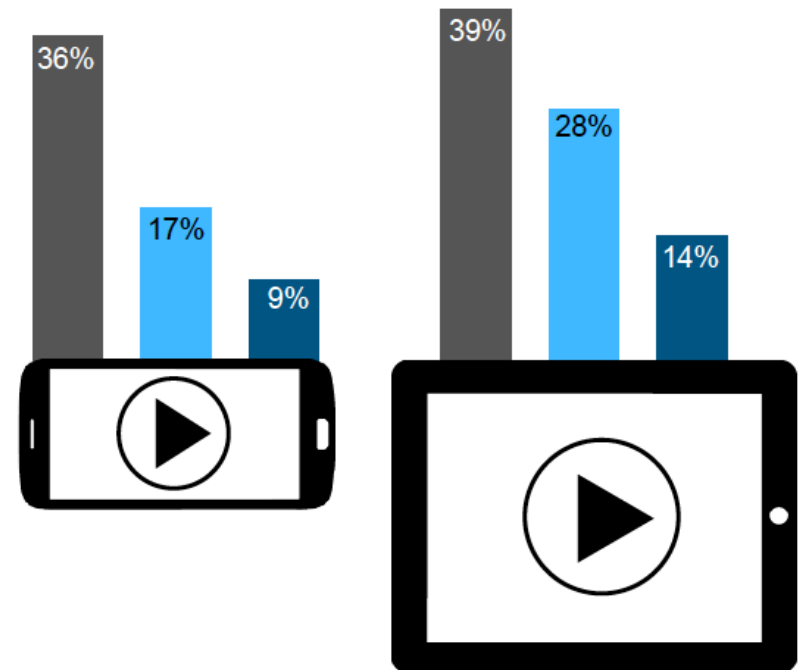
A. User behaviors: Younger audiences are more receptive to ads on mobile devices

60% look at secondary device during TV ad breaks



Percent of adults who find video ads on each device useful*

● 18-34 ● 35-49 ● 50+



A. Take-aways on *user behaviors and consumer trends*:

- Social TV activity is already occurring organically—encourage it and make it *easy*.
- Live events and contests inspire the most activity—tap into related or ancillary conversations.
- The concept of “TV” has evolved, particularly for younger audiences. Create a participatory experience where they can hang out.
- Social TV participants tend to be younger, female and power users. Think about cultivating or expanding your existing base of influencers.

Trends driving social TV opportunities:

- A. User behaviors and consumer trends drive opportunities
- B. New Technologies bring new capabilities.**
- C. TV networks and programs embrace social.
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B. Technologies: Social TV ecosystem is exploding (and changing quickly)

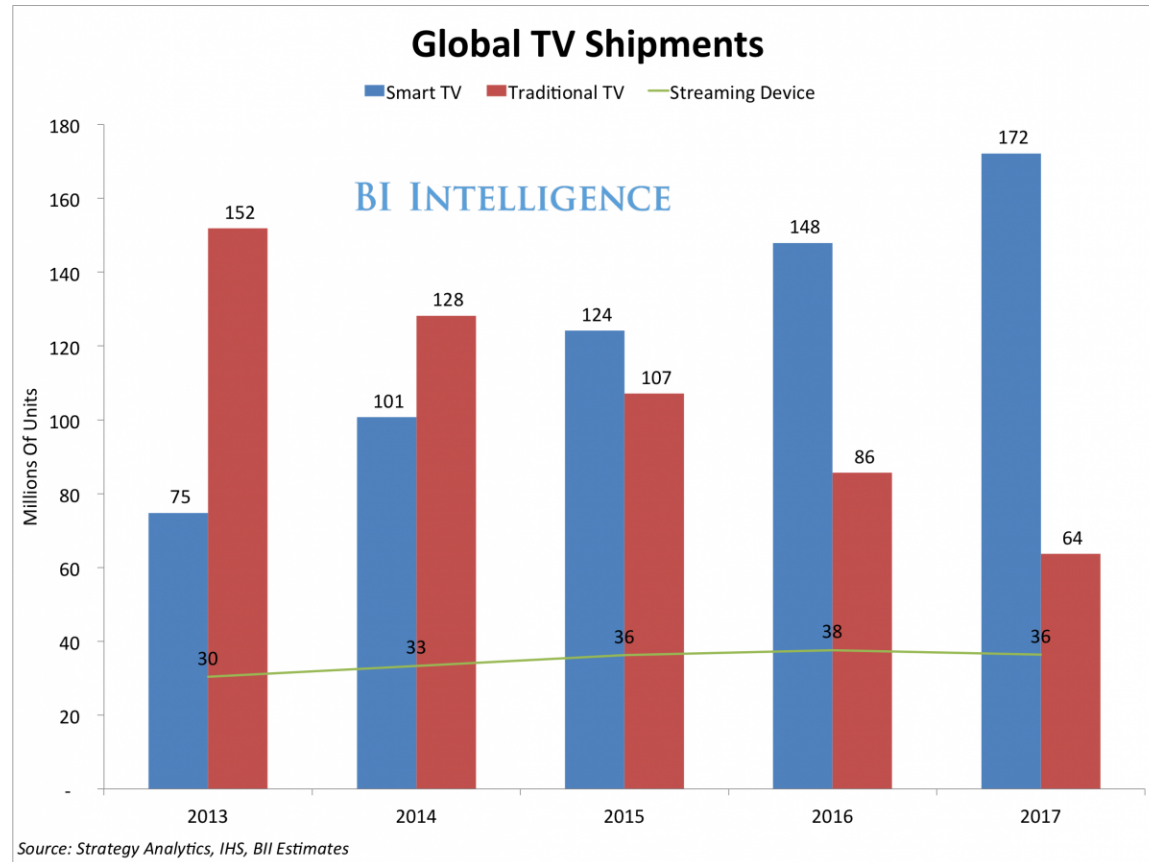
Categories:

1. Social networks
2. Metadata suppliers
3. TV-specific social networks
4. Check-in/incentive apps (rewards)
5. Social EPGs, content discovery, remote controls
6. Social curation, integration, syndication
7. Ad platforms
8. Social sharing
9. Sync (ACR), middleware
10. Connected devices (smart TVs Roku, Apple TV, Chromecast)
11. Second screen apps and platforms
12. White label platforms



B. Technologies: Explosive growth in smart TVs and connected devices

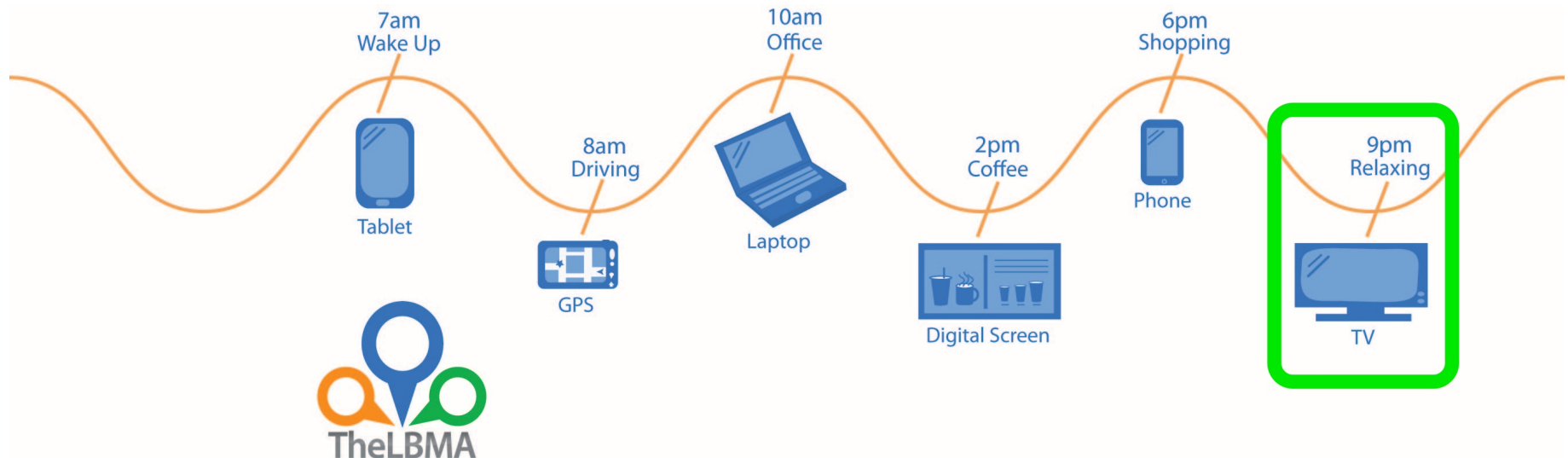
- Global shipments of smart TVs will reach a tipping point in '15, overtaking traditional TVs.
- Predicted 202 million Internet-capable TV devices in U.S. homes in 2015, a **44% increase** from 2013.
- Use of devices likely to drive the number of connected media players to 31 million by 2015.
- Apple TV, Roku & Chromecast were most popular streaming devices sold in the U.S. in 2013.



Blue=SmartTV Red=Trad'l TV Green Line=streaming device

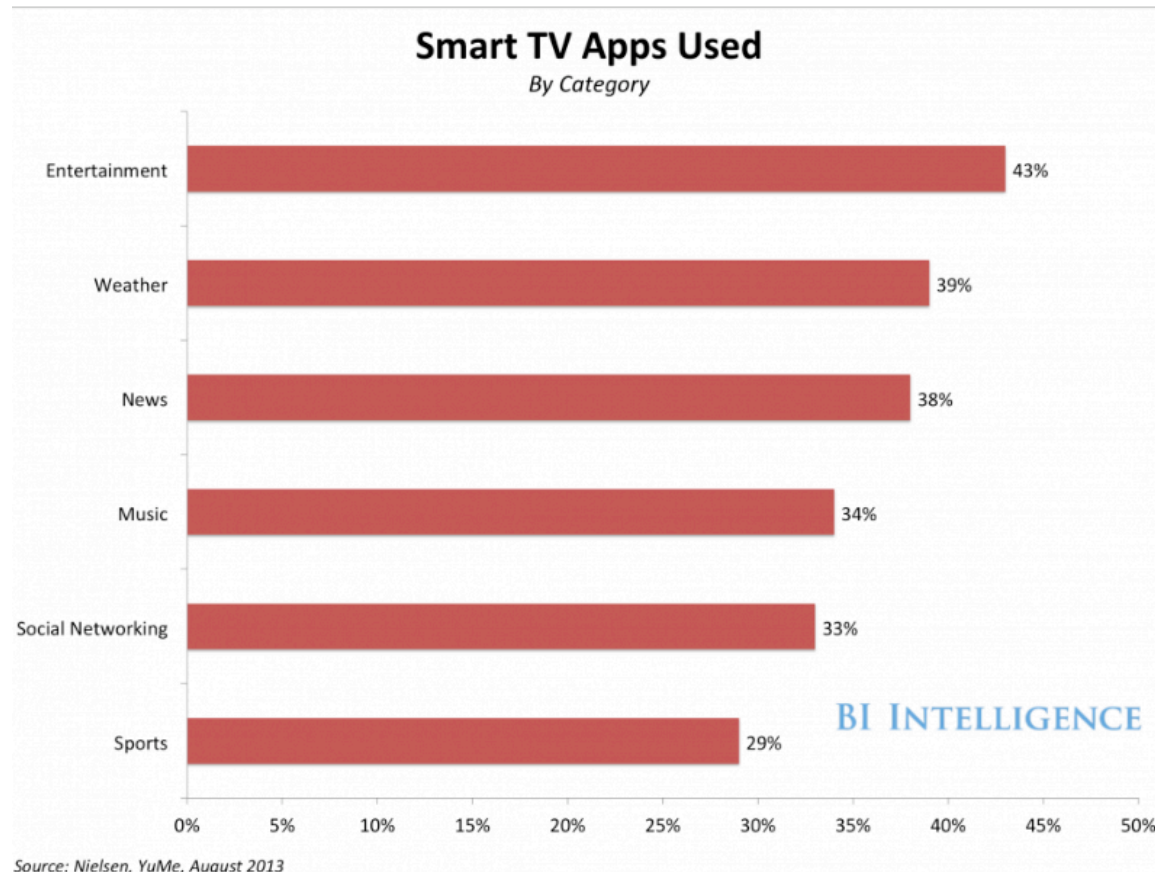
B. Technologies: Connected TVs are location aware

- Connected TVs play an important role in the multiscreen universe – especially in building new marketing and advertising models.
- Ads powered by ACR could know the location of users to tailor messages for nearest retail locations.
- Location-based marketing shifting away from couponing & towards content rewards (free viewings, downloads, etc.), where TV can play a big role.
- “Location is the new cookie” — Asif Khan



B. Technologies: Connected TVs and devices have created new app ecosystems

- Each device has its own OS; *expect to see app growth, despite lack of standards.*
- 75% of smart TV owners have a smartphone and 65% have a tablet, which creates an **opportunity for second-screen apps.**
- Gaming systems want to **own** home entertainment.
- Some analysts speculate Apple and Google may leverage their ad networks to run ads on their platforms.



B. Technologies: Apps are the new channels on connected devices

- Apps behave like TV channels in new ecosystems (tablets or smart TVs).
- Kids can watch “Fraggle Rock” via Angry Birds’ ToonTV app.
- Red Bull launched first brand app on Apple TV featuring “inspirational entertainment programming” with 40% third-party, non-branded content.
- Apps audiences are small (compared to broadcast), but growing: **Watch ESPN has been downloaded 24 million times;** number of minutes it’s viewed on mobile devices is up more than 6.5 times in past two years.



Rovio Expands ToonsTV Channel with Stan Lee, Hasbro after ‘Angry Birds Toons’ Hits 1 Billion Views

EMAIL + 0 7 28
PRINT TALK 8+1 Tweet Share



SEPTEMBER 25, 2013 | 06:00AM PT

Sony to release ‘Angry Birds Toons’ on DVD and Blu-ray in December; new season launches next year

B. Technologies: Smart TVs and second screens will compete for dominance

- Some second screen functions will migrate to smart TVs.
- Second and first screens will compete for dominance.
- Disruption and consolidation of apps is already happening.
- As the market matures, we'll figure out which each platform is best for.

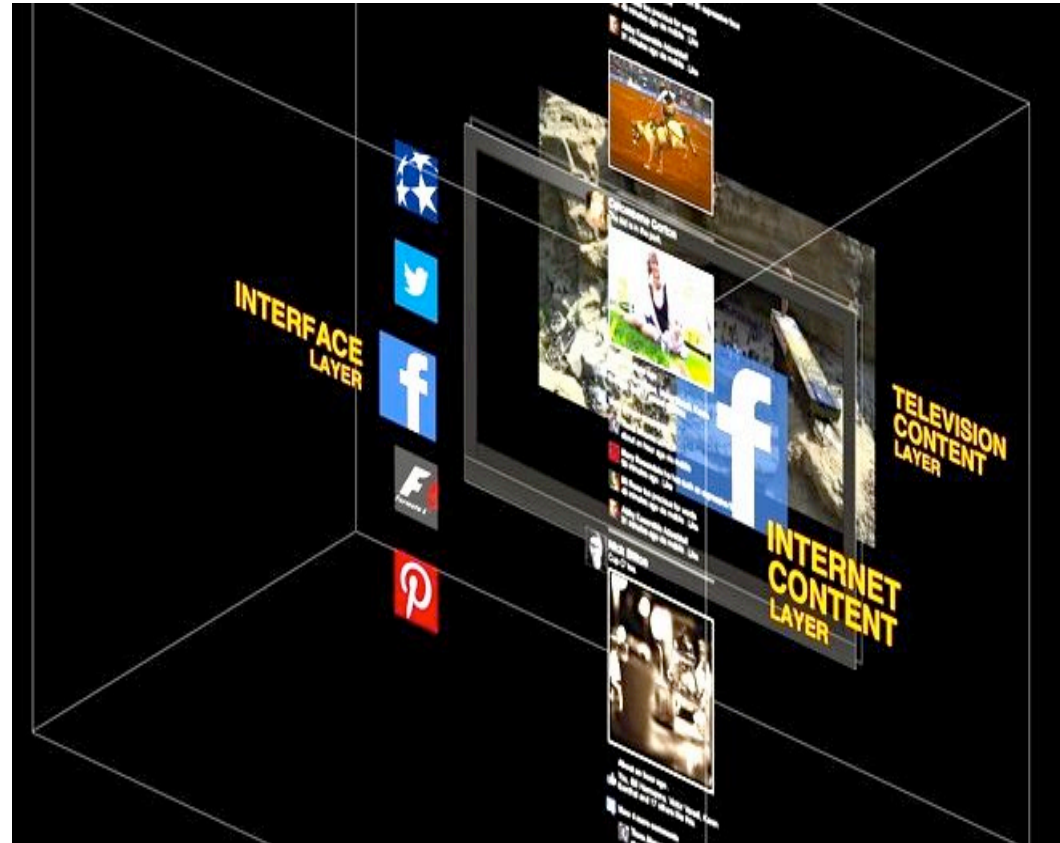


Photo via [SeeSpace](#)

B. Technologies: Automatic content recognition (ACR) enables second-screen syncing

- Used for:
 - Targeted ads
 - Voting/polling
 - Supplementary content
 - Conversations
 - Social sharing
 - Transmedia/participatory storytelling
 - T-commerce
- Will be used in 25 billion devices by 2017.



B. Technologies: TV Everywhere creates fragmentation and targeted opportunities

- Kids and teens prefer using their own devices.
- Consumers want to stop and start (sync) on all devices.
- Data will provide highly targeted ad opportunities.
- May bring up some privacy concerns.

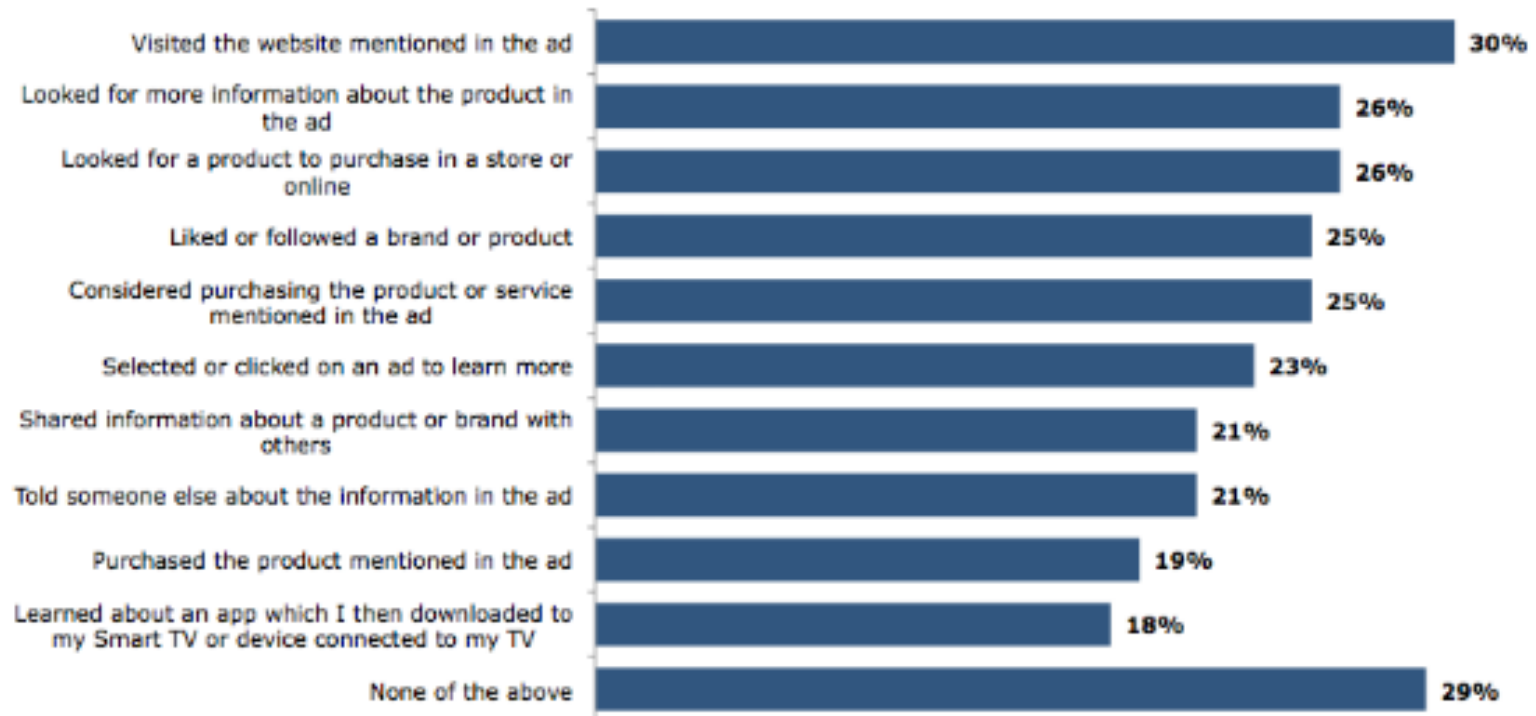


B. Technologies: Connected devices can offer better advertising results

Connected TV Viewers' Actions in Response to Ads

(% Indicating having taken action as a result of a message or advertisement for something that interested them or that they were planning to purchase)

August 2012



B. Technologies: T-commerce ramps up

- Already happening through mobile apps: “Sons of Anarchy” or *Watch with Ebay*.
- Nascent on smart TVs & streaming devices:
 - H&M Superbowl 2014 ad was T-commerce enabled on Samsung smart TVs
- Crosses over into transmedia storytelling and product placement.
- Will require advanced coordination by brand AND entertainment creators.



B. Take-aways on *social TV technologies*:

- The social TV ecosystem is complex and changing fast. Learn the terminology and watch the space for opportunities to plug in.
- Smart TVs & connected devices are a huge trend, creating new app ecosystems and opportunities to interact with consumers.
- Big brands may be able to create their own app “channels,” *owning* the social TV experience while viewers are “tuned into” their apps.
- TV Everywhere is creating a fragmented, but more granular audience for ad targeting and interaction.
- Younger audiences are especially receptive to ads and experiences on mobile devices.
- T-commerce is still experimental but will fundamentally change advertising and spur new types of sharing and recommendations.

**Get personally plugged
into Social TV right now**

Five things to do now

1. **Search, follow and participate in hashtag conversations about TV shows, online videos, or movies.**
2. **Check out T-commerce offerings (H&M, “Cougar Town”)**
3. **Download a few (mobile) social TV apps:**
 - A. Sync up with your favorite network or TV show
 - B. Participate in conversations and check-ins about TV shows
 - C. Recommendations
4. **Acquire a connected device and explore the app ecosystem (Chromecast is just \$35).**
5. **Dive deeper into social TV research and best practices at: bit.ly/socialTVclassOMI (URL is case-sensitive).**

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Questions about the content?

Want a deep dive on any of the topics?

- Tweet at me: [@CarriBugbee](#) or [@socialTVtrends](#)
- Connect with me on other social networks: [CarriBugbee.com](#)
- Email me: socialTVtrends@gmail.com

Want supplemental information for this class?

- Research links for this class series: bit.ly/socialTVclassOMI
- My larger Social TV news archive: bit.ly/socialtvfilm

Thank You!

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