



# The Role of Digital in **TV RESEARCH, FANSHIP AND VIEWING**

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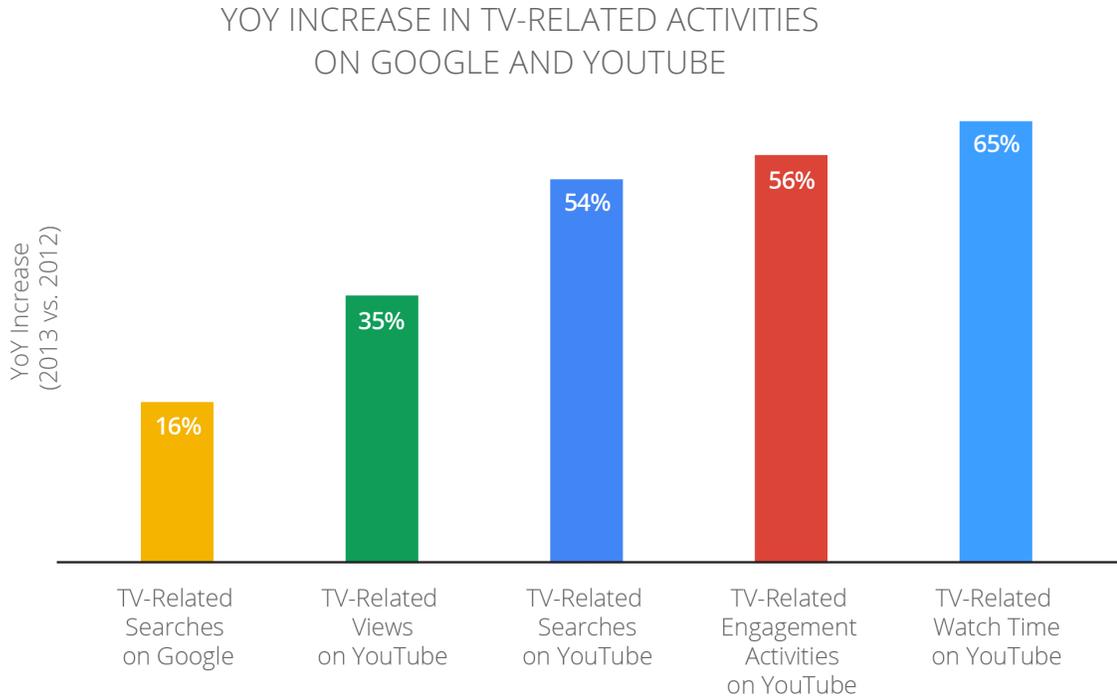
## THE **RUNDOWN**

Digital platforms such as YouTube and Google Search are changing the way people experience television. With 90% of TV viewers visiting YouTube and Google Search, we looked at how they are using these platforms to extend their experiences beyond their television sets. Here we detail the importance and growth of TV-related research online, the prevalence of fan engagement through video and the role of catch-up sources to extend the viewing time frame.

Digital platforms are changing the way today's viewer experiences television. From sharing the new viral *Jimmy Kimmel Live* video to watching the promo for the premiere of *The Walking Dead* to searching for the actor who plays the funny cop on *Brooklyn Nine-Nine*, one thing is clear: There are more ways than ever for TV audiences to research, participate in and access television content.

With 90% of TV viewers visiting YouTube and Google Search, we looked at search activity, video views and engagement metrics to help us understand how viewers are using these platforms.<sup>1</sup> Looking at a broad sample of 100 network and cable shows, we found that the corresponding online behavior is a clear indicator of a show's popularity, as evidenced by a positive correlation between these activities and live plus three-day viewership. In this paper, we examine how viewers engage with and seek out these experiences on Google and YouTube, as well as the insights we can gain from their activities.

TV-related activity on Google and YouTube has grown year-over-year (YoY). Not only have searches across Google and YouTube grown, but there has also been a rise in video views, watch time and engagement on YouTube from 2012 to 2013, suggesting that TV viewers are increasingly using these platforms to interact with fellow fans and engage with a show.



Source: Google Internal Data, May–December 2012 to May–December 2013, United States

While viewers continue to turn to multiple devices for television-related content, the query growth across Google and YouTube in the television category is driven by mobile and tablet, exceeding 100% on both of these devices.<sup>2</sup>

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## Online Research: when, what and how

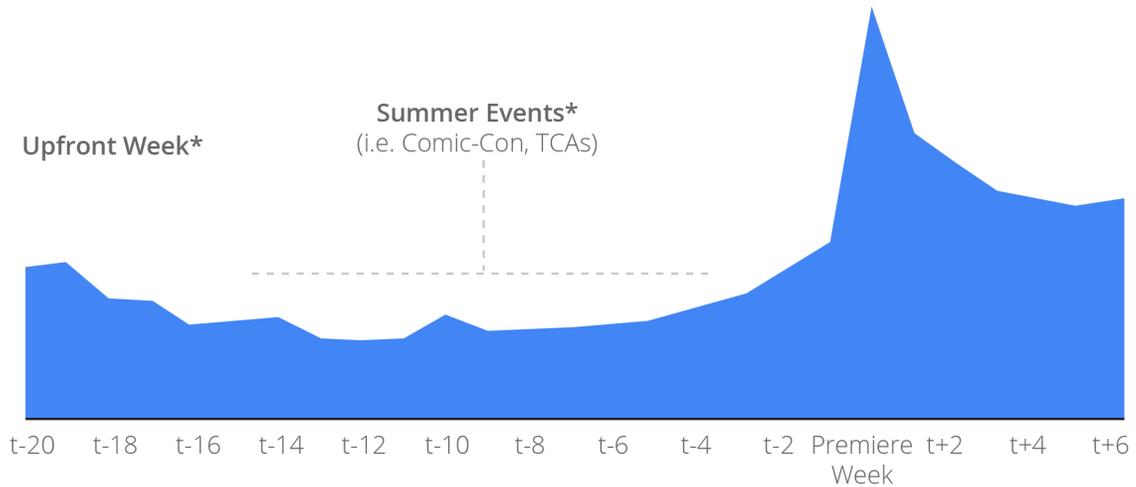
The changing face of television viewing has given way to new behaviors such as viral video sharing; audience-generated supplementary content; online streaming and use of catch-up sites such as Netflix, Hulu and networks' streaming offerings. One thing remains consistent, though—a viewer's desire to gain basic information about a show before tuning in.

Trailers, reviews, cast information and premiere dates are all common but essential types of content sought by viewers. Gathering this type of information is an important step in deciding whether or not to watch a show: Two-thirds of viewers of new television shows search online before tuning in.<sup>3</sup> Overall, both Google and YouTube serve as key destinations in the television viewers' decision-making process. Our analysis of Google and YouTube search queries and YouTube views show positive .72, .74 and .67 correlations with live plus three-day viewership, respectively.<sup>4</sup>

Let's take a closer look at Google and YouTube search and viewing behaviors, specifically the *when*, *what* and *how* of seeking information and content:

**WHEN:** We see that queries for fall television programs begin during upfronts and continue beyond the premiere, with increased activity during key show announcements and summer TV tentpoles such as Comic-Con and the Television Critics Association Press Tour (TCAs).

## WHEN TV VIEWERS ARE SEARCHING



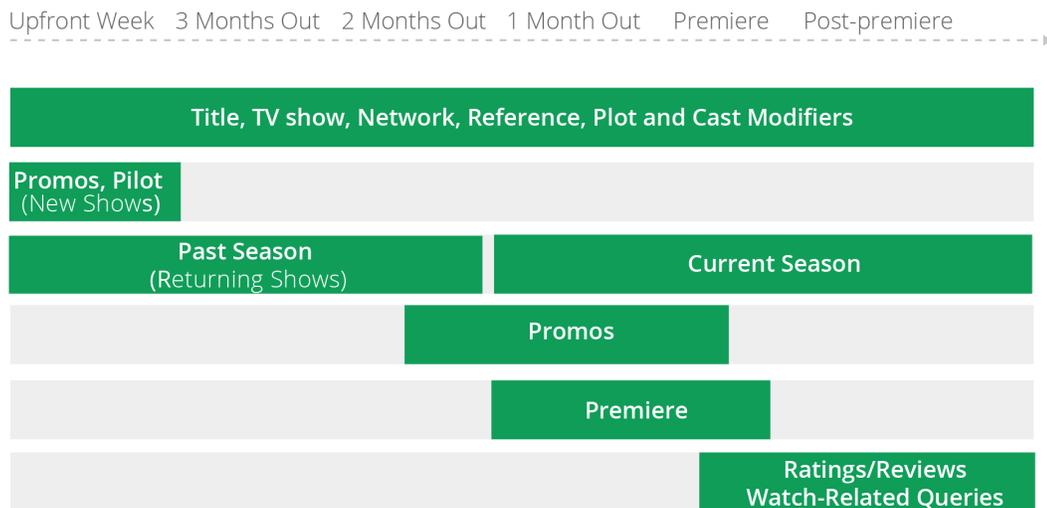
*\*Different premiere dates affect when events are relative to premiere date for a majority of shows.  
Data represents average query volume for 100 fall TV shows.  
Source: Google Internal Data, May–December 2013, United States*

Although this trend holds true for most shows, there are a few differences worth noting. New shows see spikes during upfront announcements, and then interest builds again about two months before the premiere date. Returning shows, in contrast, see sustained volume throughout the off-air period. Although new shows generally have fewer searches than returning shows, they have twice as many queries, on average, for promos, ratings and reviews. This suggests that users may be doing their homework prior to tuning in.

In addition, there are a few genre differences worth noting. From a trending standpoint, there is more activity earlier on for dramas and comedies. Queries for reality programs pick up in the few weeks leading up to premiere and are sustained post-premiere. In examining search intensity (queries/live plus three-day viewership), serialized dramas—especially teen dramas such as *Vampire Diaries* and *Arrow*—have the highest search intensity, followed by comedies and reality shows. Procedural dramas, in contrast, have the lowest search intensity.<sup>5</sup>

**WHAT:** Outside of a show's title, some of the most common TV-related search terms include season, TV show, network and cast modifiers, among others. Of these, we see that some are sustained throughout the premiere timeline, while others are concentrated to parts within it. For instance, promo queries spike at upfront week and tend to start building again about two months pre-premiere. Premiere-related queries are concentrated in the weeks leading up to and immediately following the premiere. Ratings and review queries, on the other hand, tend to be concentrated during premiere week and the weeks after it.

## WHAT TV VIEWERS ARE SEARCHING FOR...AND WHEN



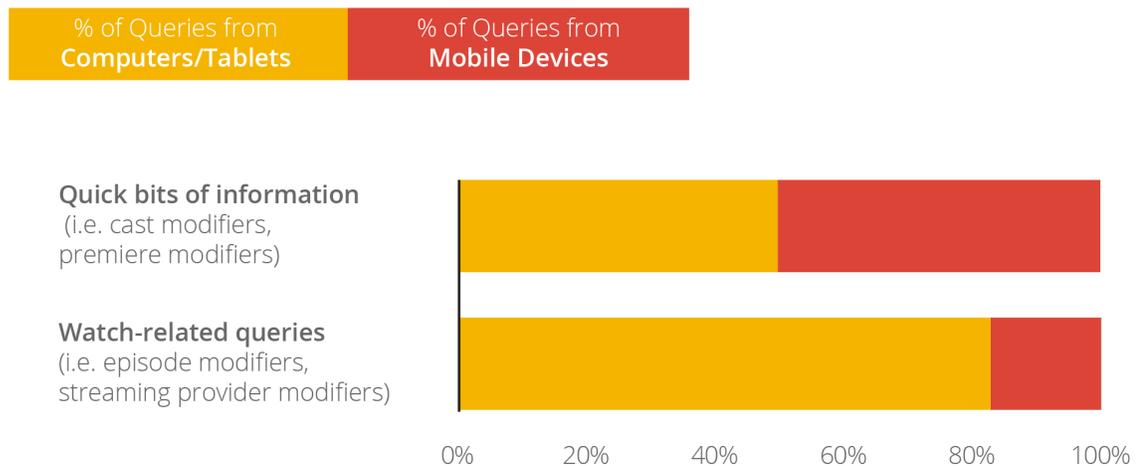
Source: Google Search Internal Data, May–December 2013, United States

One important component of what users are searching for is trailers for new shows. In addition to being frequently searched, the trailer is the most watched piece of content for new shows on YouTube, whereas videos viewed for returning shows are more varied in nature.<sup>6</sup>

*In addition to being frequently searched, the trailer is the most watched piece of content for new shows on YouTube.*

**HOW:** We examined 17 categories of Google Search queries across devices and discovered that intent can vary by device. For instance, cast, premiere/finale and plot-related searches regularly occur on mobile devices relative to other categories, suggesting that users often seek quick bits of information on a small screen. Alternatively, watch-related queries on Google Search are overwhelmingly searched on desktop and tablet devices, highlighting a preference among users to consume longer content on larger-screened devices.

## WHEN TV VIEWERS ARE SEARCHING



Source: Google Search Internal Data, June–December 2013, United States

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### Viewer participation: Going beyond the episode

For a core group of fans, a 22- or 44-minute TV episode isn't enough. Whether it's seeking additional content offline (such as the live talk show *Talking Dead* that discusses episodes of *The Walking Dead*) or online (network websites or industry sources such as [imdb.com](http://imdb.com)), TV lovers are looking to further engage with their favorite programs through "beyond-the-episode" content such as parodies, behind-the-scenes clips, and extended trailers found on YouTube. To better understand their online experience, we look to YouTube

engagement metrics (i.e., shares, likes/dislikes, comments, subscribes), which collectively show a positive .58 correlation to live plus three-day viewership.<sup>7</sup>

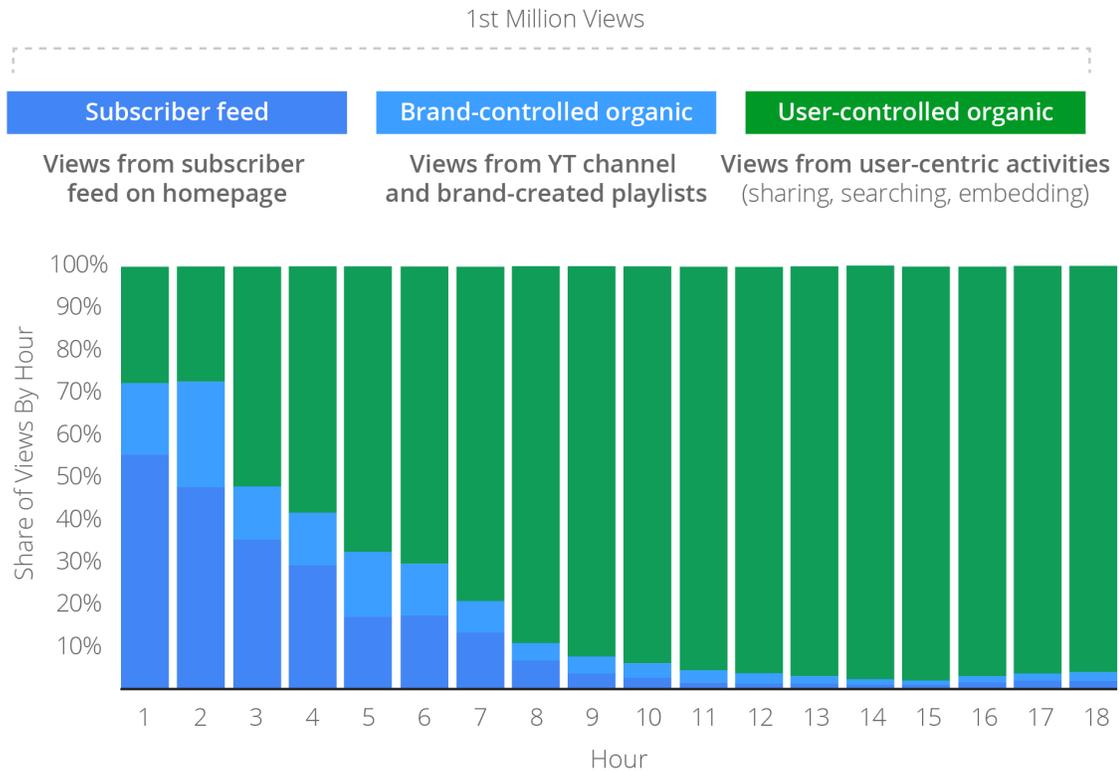
A key behavior among YouTube users is the propensity to discuss their favorite shows and create new related content. Indeed, in 2013, for every piece of content uploaded by a show's network on YouTube, there were more than seven pieces of community-generated content related to the show. Some fan favorites far exceed that benchmark: *Game of Thrones*, for example, had 82 community-generated videos per video uploaded by the network and *The Vampire Diaries* had 69.<sup>8</sup>

These same fans are not only engaging with this content but also looking for ways to share and discuss it with a community of like-minded fans. An example of this collective enthusiasm can be found in YouTube's subscriber community. Overall, they tend to watch 52% more video than those who don't subscribe.<sup>9</sup> And because they watch more video overall, they're often the first to discover content.

A popular late-night talk show's highly viewed YouTube video that reached one million views in less than 18 hours exemplifies this phenomenon.<sup>10</sup> We can see that subscribers comprise the majority of views right after the video goes live, but over time, discovery sources begin to shift as these initial viewers (the subscribers) share the video with others. As views from subscribers begin to taper off, direct links, YouTube searches and other user-controlled discovery methods take over. This highlights the importance of a strong subscriber base because subscribers are often the first to see and subsequently share content.

*In 2013, for every piece of content uploaded by a show's network on YouTube, there were more than seven pieces of community-generated content related to a show.*

## VIEWERSHIP PATTERN AFTER POSTING OF POPULAR VIDEO



Source: Google Internal Data, November 2013, United States

It's also a reflection of a larger trend on YouTube—overall, the platform has seen a 3x increase YoY in daily subscribers.<sup>11</sup> Additionally, TV networks have been gaining subscribers for their official YouTube channels at a blistering rate, with an average per-channel subscribership increase of 69% from the beginning to the end of 2013.<sup>12</sup>

*TV networks have been gaining subscribers for their official YouTube channels at a blistering rate, with an average per-channel increase of 69% in 2013.*

## Accessing content: Extending the viewership timeline

In the past few years, we've seen a shift in measurement as metrics have evolved to capture longer viewing windows. This reflects not just a change in user behavior but recognition that there is considerable value in time-shifted viewing. With shows seeing a marked increase in viewership numbers across genres in the three days following a premiere and between seasons, tune-in is now happening across a much more extended timeline.

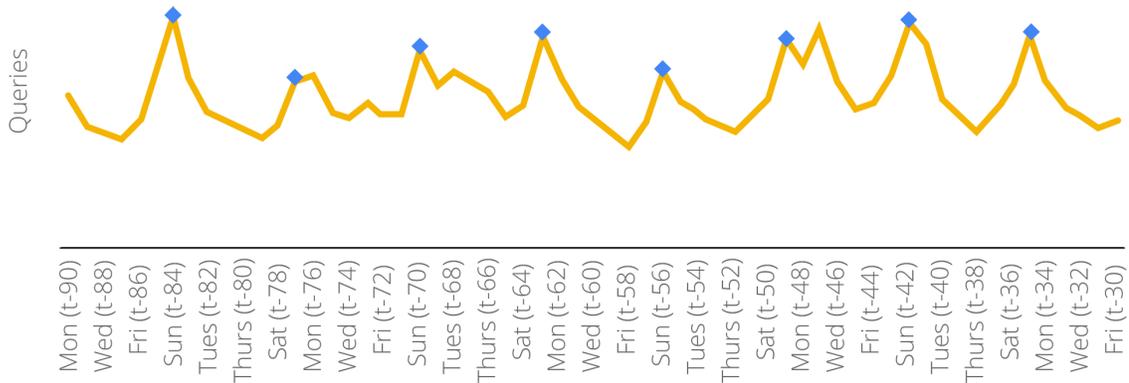
One significant trend is in-season catch-up behavior. DVRs, new streaming options and watch apps provide viewers with greater flexibility than ever to watch the content they want, when they want it. Search patterns also reveal a rising interest in this notion of "TV on my time." Queries on paid streaming providers such as "Amazon Instant Video" or "Hulu Plus," have increased 16% YoY, while watch app-related queries, such as "HBO GO" and "AMC mobile," have increased 35% YoY.<sup>13</sup>

Catch-up behavior is not restricted to in-season activity. If given the opportunity to catch up on a show before a new season, 78% of viewers would be more likely to tune in to the upcoming season.<sup>14</sup> Query trends also reflect this sentiment: in the pre-premiere time frame, watch-related queries have increased 50% YoY, signaling intent to catch up on previous episodes before a season premiere.<sup>15</sup> So when do viewers start catching up? Of the 70% who said that they catch up on past seasons of returning shows, approximately half start more than two months in advance.<sup>16</sup>

Day of week can also play a role in catch-up activity. Because viewership patterns show greater preference for time-shifted viewing of dramas, we analyzed pre-season search patterns for a set of dramas and found that catch-up-related queries tend to spike on Sundays. This "lazy Sunday effect" suggests that Sundays may be the most popular day of the week to both stream and catch up on shows.

*Of the 70% who said that they catch up on past seasons of returning shows, approximately half start more than two months in advance.*

PRE-PREMIERE, DAILY QUERY TRENDRING FOR  
HIT SERIALIZED DRAMAS  
CATCH-UP-RELATED QUERIES



Source: Google Internal Data, May-August 2013, United States

As networks and streaming providers create new ways for viewers to access programming outside the traditional viewing window, they're creating the opportunity for new viewership as well. Understanding the patterns of how and when viewers are researching catch-up options is important in recognizing key moments of tune-in engagement.

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**Summary**

Digital platforms have fundamentally changed the way TV viewers research, participate in and access their favorite shows. Search, video and engagement activities, which show a positive correlation to viewership, can provide additional insight into a show's popularity. Here we summarize our key observations across Google and YouTube:

**RESEARCH**

- We see online television activity growth in the YoY increase in TV-related queries on Google and YouTube, and a rise in watch time, engagement with, and views of TV-related videos on YouTube.

- Across the board, viewers are starting their research well before a premiere, with activity continuing several weeks beyond the premiere.

## PARTICIPATION

- TV audiences often look to go “beyond-the-episode” on YouTube.
- YouTube’s subscribers are fans who actively engage with a show and other fans, and they’re often key in spreading the word.
- YouTube users engage with their favorite shows through discussion and creation of new related content.

## ACCESS

- Time shifting is here to stay, with catch-up behavior starting well before new seasons and continuing after episode premieres.
- Sunday may be the most popular day of the week to both stream and catch up on shows.



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## Sources

- 1** Nielsen, @Plan, Q4 2013.
  - 2** Google Internal data, May–December 2012 to May–December 2013, United States.
  - 3** Google/Ipsos OTX, Pathways to TV Consumption Study, 2013.
  - 4** Google Internal Data and Nielsen TV Toolbox, United States.  
Analysis looks at relationship between non-premiere live plus three-day viewership and leading seven-day Google and YouTube queries and YouTube views for cable and network shows across drama, comedy and reality genres. Analysis excludes outliers such as teen-skewing shows, musical reality competitions and shows with several searchable non-TV entities. View metrics analyzed on a representative sample of thirty-two fall shows.
  - 5** Google Internal Data and Nielsen TV Toolbox, September–December 2013, United States.
  - 6** Google Internal Data, 2013, United States.
  - 7** Google Internal Data and Nielsen TV Toolbox, United States.  
Analysis looks at relationship between non-premiere live plus three-day viewership and leading seven-day engagement metrics (likes/dislikes, comments, shares and subscribes) for cable and network shows across drama, comedy and reality genres. Analysis excludes outliers such as teen-skewing shows, musical reality competitions and shows with several searchable non-TV entities. Engagement metrics analyzed on a representative sample of thirty-two fall shows.
  - 8** Google Internal Data, 2013, United States.
  - 9** Google Internal Data, January 2014, United States.
  - 10** Google Internal Data, November 2013, United States.
  - 11** Google Internal Data, October 17, 2013.
  - 12** Google Internal Data, 2013, United States.
  - 13** Google Internal Data, 2012–2013, United States.
  - 14** Google, Google Consumer Survey, n=500, March 8, 2013.
  - 15** Google Internal Data, T-12 week – premiere week, United States.
  - 16** Google, Google Consumer Survey, n=500, February 6, 2014.
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