# TV Viewer Journey

## How Digital Drives Viewers to New TV Shows

Ipsos/Google Research

Qualitative: July – October 2012, Quantitative: December 2012

Google

# Methodology

- Better understand how television viewers adopt new TV shows, particularly with regard to digital media and its role in the path to tune in.

- Ipsos conducted qualitative and quantitative phases of research, with qualitative findings informing quantitative design.

  – Qualitative Phase: one-on-one in-depth interviews in Boston, Chicago, San Francisco, Philadelphia, Cincinnati, and Los Angeles conducted between July and October 2012. The focus of the interviews were <u>either</u> Broadcast or Cable shows and asked participants about influences, touchpoints, and roles needed prior to and after watching a specific new show.

    - All qualified participants for the qualitative phase were:

      – US residents, A18 – 34

      – Subscribers of cable or satellite TV and high speed internet and own a smartphone and DVR

      – Started watching at least one network or cable TV primetime program in the past 2 months

# Methodology, Continued

- Quantitative Phase: Attitude and usage survey fielded online among a total of 1,000 respondents between November 15th-18th. Respondents were asked about activities in their path to tune-in for a specific new Broadcast TV show they started watching in Fall 2012.
  - All qualified respondents for the quantitative phase were:
    - US residents, A18 – 49
    - Subscribers of TV and high speed internet
    - Spend 1+ hours per week watching primetime Broadcast TV
    - Watched at least one new network TV show (out of 18 new shows with season premieres in Fall 2012)
      - » Must have seen/heard/read something about it online prior to viewing
      - » Must have at least shared the decision to watch the show

# Executive Summary

**1**

**New Paradigm Leads to Increased Show Vetting, Information Seeking**
Audience mentality toward new television shows shifted in past few years, from *anticipation* (I want to watch) to greater *skepticism* (Why should I watch, especially in light of so many entertainment alternatives?)

**2**

**Online Plays a Greater Role in Discovery & Consideration**
75% of viewers discover new TV shows online. Online video and TV ads are the most useful ad formats in helping viewers decide if they want to watch the show. In particular, over half of viewers said online ads help introduce them to shows coming out on networks they don't regularly watch.

**3**

**The Uncertain TV Viewer Looks for Reasons to Feel Confident**
62% of viewers go online to watch videos, read reviews and search for more information about a show. During the pre-premiere phase, the most important information viewers seek are related to understanding the plot and feeling confident the show is worth their time.

**4**

**Audiences' Wavering Intent to View Leads to Need for Catch Up**
More than 3 out of 4 viewers who started watching a new show intended to tune in at some point during the pre-premiere phase. However, intent does not always result in tune in: 28% of a new show's audience on average, ended up catching up on the premiere or missed it altogether. Viewers who missed the premiere and late-comers alike desire a chance to catch up.

Ipsos Consumer Journey Study, Viewing Habits on Path to TV Premiere Selection. Broadcast TV Quantitative Findings, December 2012; Qualitative learning, Ipsos Consumer Journey Study, Viewing Habits on Path to TV Premiere Selection. Cable & Network Viewer IDIs July – October 2012

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# Overall Consumer Sentiment



Qualitative learning, Ipsos Consumer Journey Study, Viewing Habits on Path to TV Premiere Selection. Cable & Network Viewer IDIs
July – October 2012.

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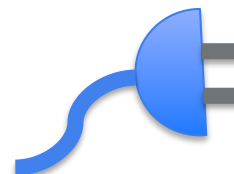
# Behavioral Observations & Macro Shifts



Search as Curiosity
Payoff, Interest Driver



Show Quality Vetting
through Content & Video



DVR Mainstreaming



Unplugged & 'Off-
the-Grid Viewing

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July – October 2012.

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Old Paradigm to New Paradigm

"I WANT TO WATCH!"

Appointment Viewer

Sense of urgency

Fear of missed opportunity

Focused sources to vet quality

"WHY SHOULD I WATCH?"

Modern Viewer

Digital alternatives & entertainment clutter

On-air vs. time-shifting safety net

Default is to not tune-in

# Time vs. Quality Alternatives Pressure Traditional Intent to View Decision

## Will it be worth my time?

**Is it really worth it:** Emotional expectations & needs for watching TV vs. doing something else. Viewers seek proof that investing in show will pay off

**Who am I watching with:** Co-viewers introduce additional wrinkle to viewing decision: negotiation dynamics, consensus anxiety, fear of rejection, joy of sharing

**When and how will we watch:** Time-shifting capability further dilutes definition of intent; device depends on social & timing considerations

**Dependencies:** Intent & top-of-mind interest fluctuates over time. Fighting for curiosity and interest early on appears to play a role in later intent, or commitment to watch

Qualitative learning, Ipsos Consumer Journey Study, Viewing Habits on Path to TV Premiere Selection. Cable & Network Viewer IDIs July – October 2012.

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# Cross media Interest-Driving Influencers

Engaged and less engaged viewers all had common influencers throughout TV show decision stories:

**Entertainment News**

**E-News, Celebrity & Talk show:** Formative early influence that support later prompts.

**Spouse:** As viewing gatekeeper, co-counsel and key to on-air view

**Google:** The first stop to fulfill upon curiosity, or vet quality

**Friends & Roommates:** As source of information, viewing and trial peer pressure and group gatekeeper to on-air view.

**YouTube:** Filtering and Quality vetting, Clip sampling, promo reviewing, share & convince friends.

**Social Networks:** As interruptive prompt to check out more about program.

**IMDB & Wiki:** Search result and destination for more show, cast and behind the scenes info

Qualitative learning, Ipsos Consumer Journey Study, Viewing Habits on Path to TV Premiere Selection. Cable & Network Viewer IDIs July – October 2012.

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# Social Currency of TV, Co-Viewing & The Negotiation Factor

Social factors were common theme of decision

Often a negotiation process…

"I wish someone could connect me with others to talk about the show."

Digital co-viewing and social TV behaviors also reported.
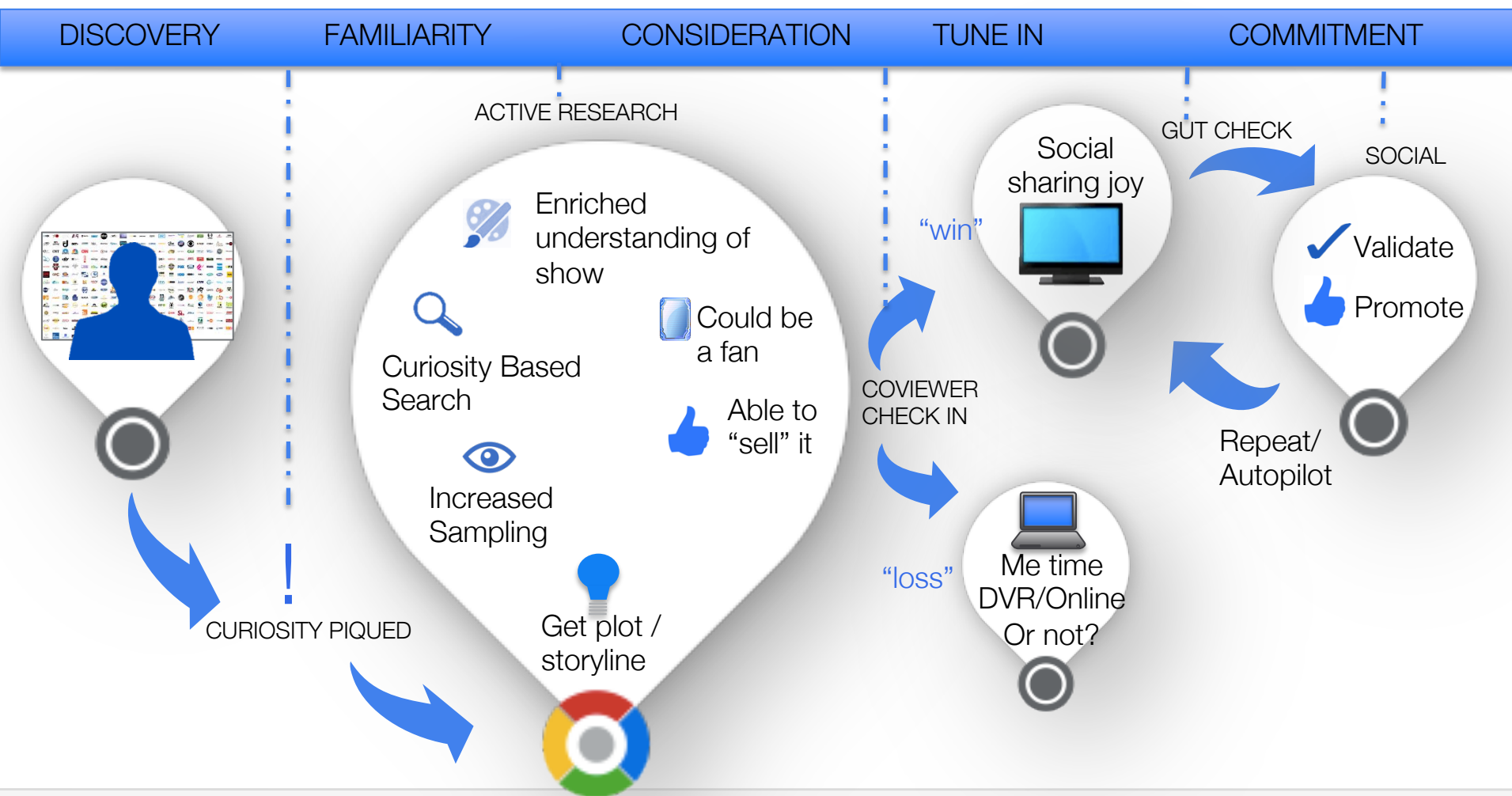
Communal viewing, consensus building is a factor

Search in the moment, social fact sharing within group or online

Desire for "Fun with others," or "Together time"

"I want to get others hooked."

Qualitative learning, Ipsos Consumer Journey Study, Viewing Habits on Path to TV Premiere Selection. Cable & Network Viewer IDIs
July – October 2012.

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# Tune In Journey Evolved to Higher Consideration

**DISCOVERY** · **FAMILIARITY** · **CONSIDERATION** · **TUNE IN** · **COMMITMENT**

ACTIVE RESEARCH

Enriched understanding of show

Curiosity Based Search

Could be a fan

Able to "sell" it

Increased Sampling

Get plot / storyline

CURIOSITY PIQUED

"win"

COVIEWER CHECK IN

Social sharing joy

"loss"

Me time DVR/Online Or not?

GUT CHECK

SOCIAL

✓ Validate

👍 Promote

Repeat/ Autopilot

# Discovery

DISCOVERY | FAMILIARITY | CONSIDERATION | TUNE IN | COMMITMENT

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# Most Viewers Are Discovering New TV shows online

## How Viewers Discover New TV Shows

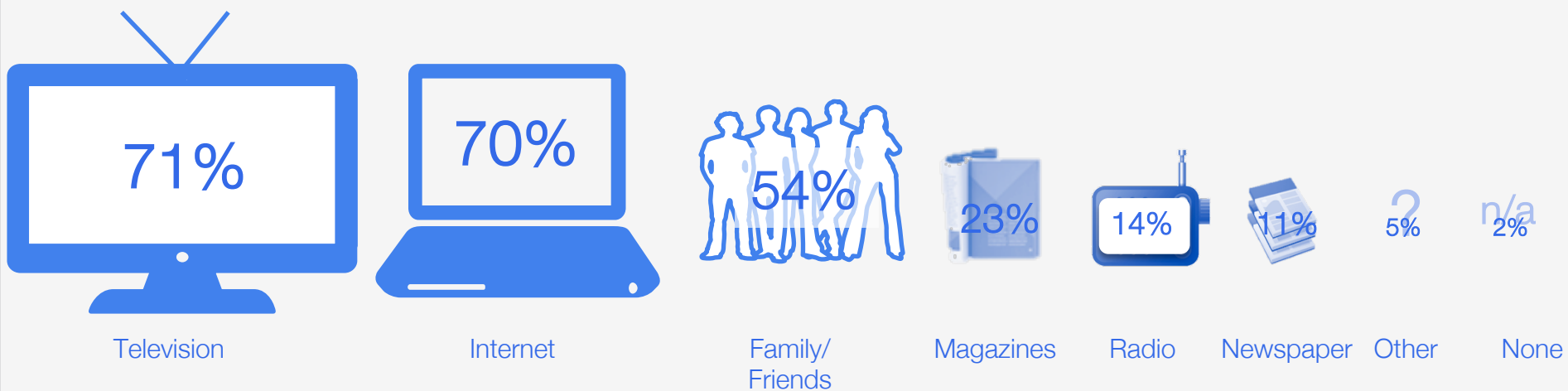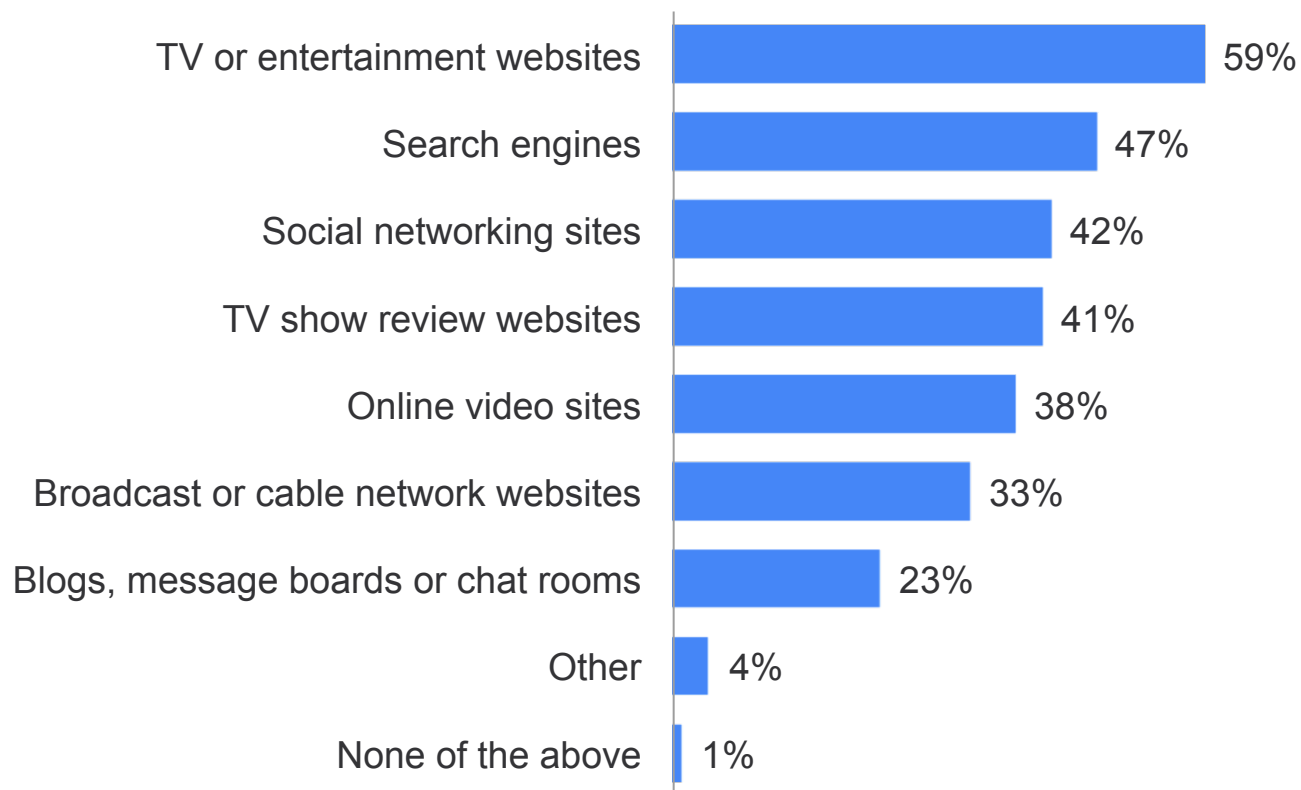| Discovery method | Percentage |
|---|---|
| I see new show promos/previews while watching another show | 53% |
| My family, friends, or coworkers recommend new shows to me | 49% |
| I look for new shows channel surfing or using on-screen guide | 34% |
| * I notice online advertisements for new TV shows | 32% |
| * I see promos or previews on an online video site | 27% |
| * I look on TV network or cable channel websites | 26% |
| * I notice posts about new TV shows on a social network | 26% |
| * I stumble upon online reviews or articles about new TV shows | 25% |
| * I visit TV show or entertainment websites for | 21% |
| I use On Demand to find new shows | 18% |
| * I search for new show information online using a search | 14% |
| Other | 6% |
| None of the above | 3% |

## 75% Discover new TV shows online

# Viewers As Likely to Turn to the Internet as to TV When Looking for a New Show

## Sources of Info Likely to Use When Looking for a New Show

| Television | Internet | Family/Friends | Magazines | Radio | Newspaper | Other | None |
|:---:|:---:|:---:|:---:|:---:|:---:|:---:|:---:|
| 71% | 70% | 54% | 23% | 14% | 11% | 5% | 2% |

Base:   n=1000
(Q30) Which source(s) of information are you likely to turn to when looking for a new TV show to watch? Select all that apply.
Ipsos Consumer Journey Study, Viewing Habits on Path to TV Premiere Selection. Broadcast TV Quantitative Findings, December 2012

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# Search and Aggregated Content are Key Online Sources; Network Sites Rank Lower on the List

## Online Sources of Info Likely to Use When Looking for a New Show

| Source | Percentage |
|--------|-----------|
| TV or entertainment websites | 59% |
| Search engines | 47% |
| Social networking sites | 42% |
| TV show review websites | 41% |
| Online video sites | 38% |
| Broadcast or cable network websites | 33% |
| Blogs, message boards or chat rooms | 23% |
| Other | 4% |
| None of the above | 1% |

# Mental Note Effect

Viewers may be exposed to numerous ads, promos, and impressions for a new show, but no progress is made until something breaks through their mental clutter and the viewer takes mental note of the show.

Breaking through the clutter most often results from some form of familiarity (feeling of déjà vu, surprising show concepts, teaser/e-news intrigue, connecting through peer influence or connecting via compelling/relevant video content

# Discovery Milestone: Take Notice & Make Mental Note

The preview looked good and Michael Ealy was in it, so I thought I would give it a chance.
Yejide, Chicago
Common Law

Saw a 2-3 minute promo for Newsroom after Game of Thrones. [Because of Aaron Sorkin] I thought it might be worth checking out.
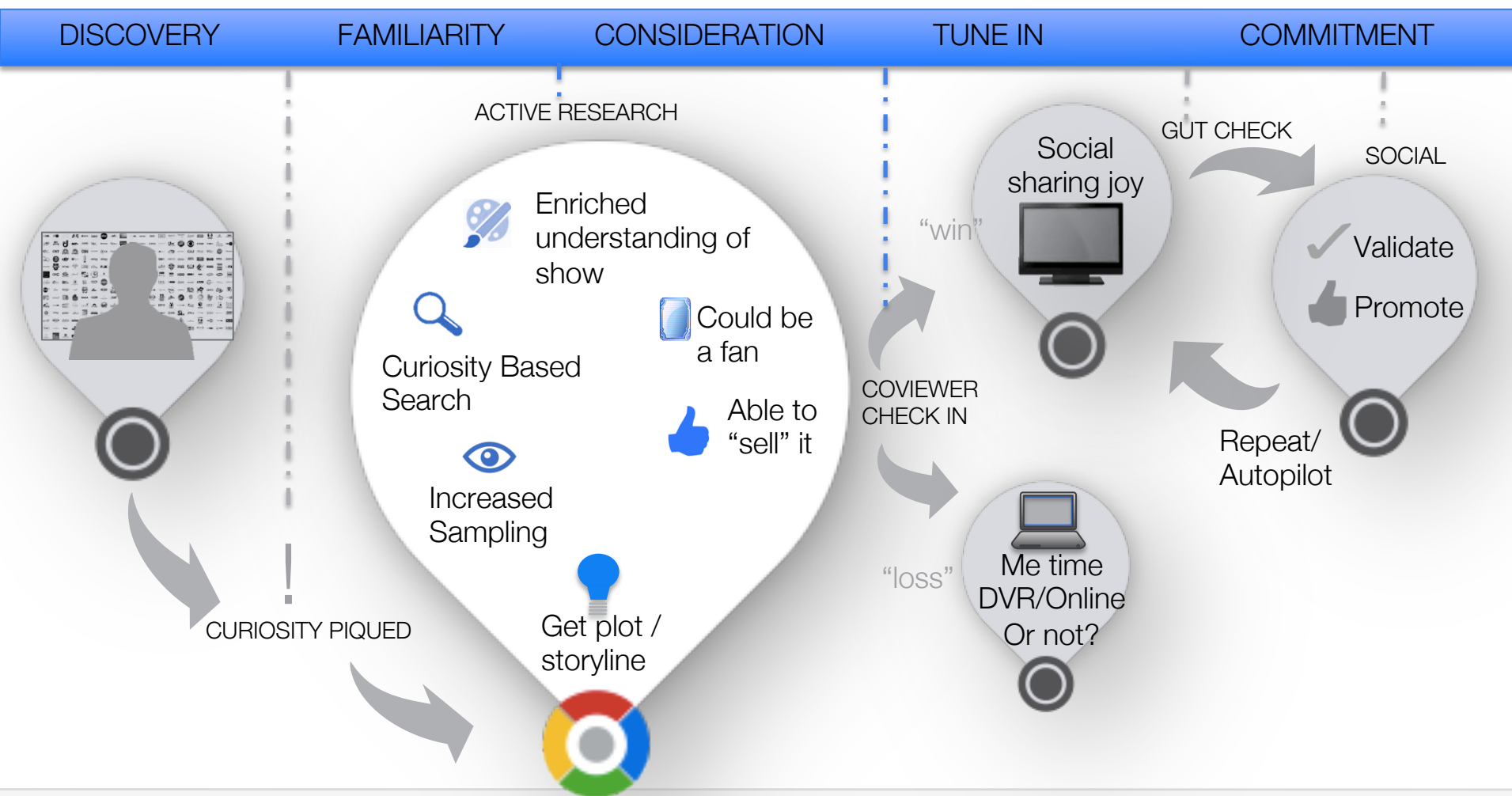Nick, Philadelphia
Newsroom

I wrote the show off based on feeling it was too similar to Modern Family – cashing in on the same idea – and likely not as funny.
Mitchell, San Francisco
The New Normal

Jeremy Irons means it's a good show. I stored it in my head. Good acting.
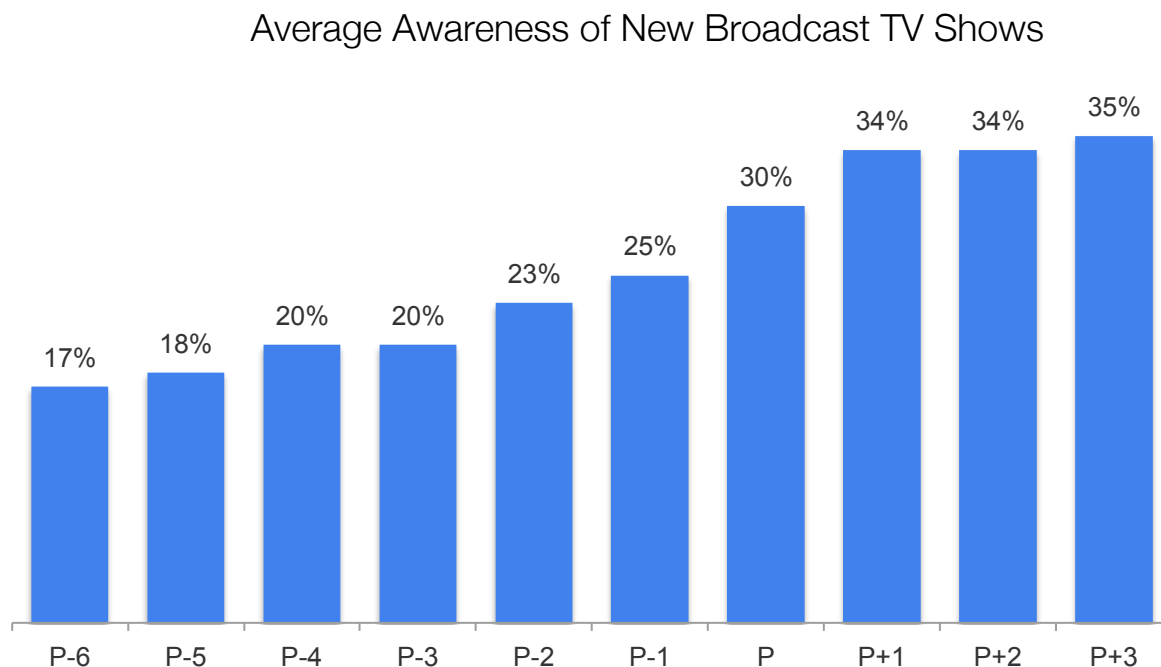Stan, Cincinnati
The Borgias

I liked the actor from Weeds, so I thought he might be good on Animal Practice.
Jessica, Chicago
Animal Practice

I was excited about the show because I remember Mindy from The Office – very funny. I made a mental note to check it out when it started.
Jacqui, Chicago
The Mindy Project

# Familiarity & Consideration

| DISCOVERY | FAMILIARITY | CONSIDERATION | TUNE IN | COMMITMENT |
|---|---|---|---|---|

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# Major Opportunity to Increase Awareness for New Broadcast Shows

## Average Awareness of New Broadcast TV Shows

| P-6 | P-5 | P-4 | P-3 | P-2 | P-1 | P | P+1 | P+2 | P+3 |
|-----|-----|-----|-----|-----|-----|---|-----|-----|-----|
| 17% | 18% | 20% | 20% | 23% | 25% | 30% | 34% | 34% | 35% |

**There is still opportunity to increase awareness even after premiere week**

# What Do Viewers Need in the Pre-Premiere Stage?

Understanding the storyline and feeling confident it will be worth investing time were the most important roles

**Comprehension 48%**
Understanding the plot or storyline

**Investigation 29%**
Finding details about the show (e.g., cast, when it airs)

**Discovery 37%**
Discovering more about the show that made me feel excited to watch

**Enrichment 34%**
Feeding my interest in the with content or connecting with others

**Projection 41%**
Judging whether I could see myself being a fan

**Visualization 39%**
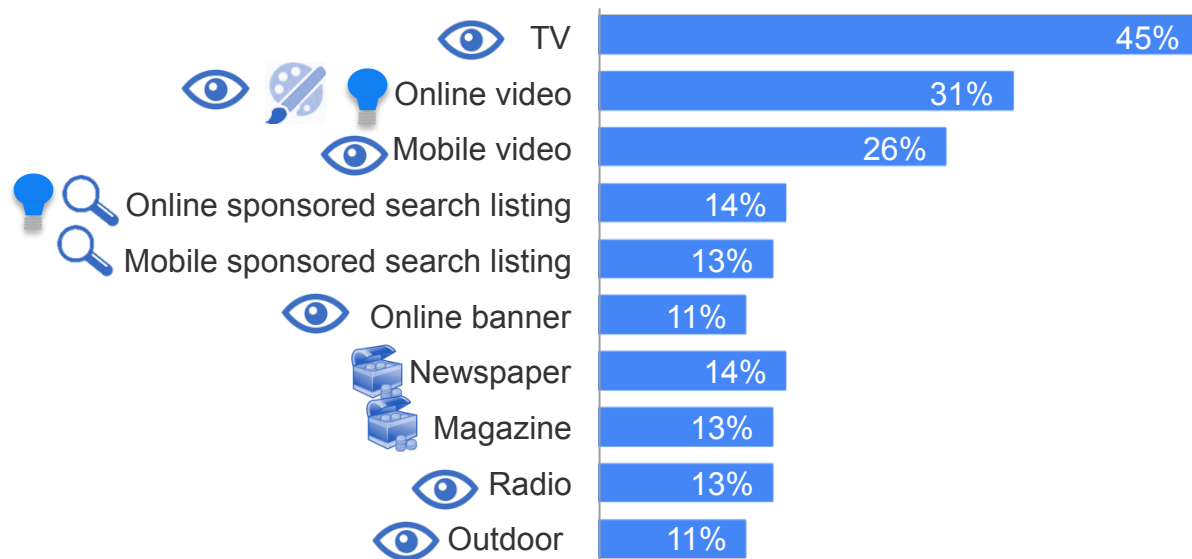Imagining what the show would be like

**Confidence 46%**
Feeling confident that the show would be worth my time

**Validation 17%**
Exploring other views of the show to compare to my own thinking

# TV and Video Ads Are Most Useful in Deciding to Watch a New Show

## Ad Formats Perceived to be Extremely Useful
### Top Box Responses

| Ad Format | Percentage |
|---|---|
| TV | 45% |
| Online video | 31% |
| Mobile video | 26% |
| Online sponsored search listing | 14% |
| Mobile sponsored search listing | 13% |
| Online banner | 11% |
| Newspaper | 14% |
| Magazine | 13% |
| Radio | 13% |
| Outdoor | 11% |

Comprehension    Confidence    Projection    Visualization    Discovery    Enrichment    Investigation    Validation

# Awareness Milestone: Gather Relevant Info

Continued to hear about the show from ads on Perez Hilton and a clip online, which was hilarious. Continued my excitement for the show.
Molly, San Francisco
The Mindy Project

I went to Reddit to get answers to questions about the show. I chose Reddit because it's easy, I trust the people and there's no other forum login required
Aaron, Chicago
Game of Thrones

Finding out the options, being prepared… I know how to manage my time around TV, I can fit all my shows in, and this allows hers to move forward to watch the show. This makes a show mine.
Christine, San Francisco
Partners

I went on Google and searched for Go On before I watched. I wanted to see what the plot was beforehand, and if I would really want to watch. If you read what it's about, you can relate better. This helps you watch it more, it draws you in.
Marc, Chicago
Go On

I was at a house party and the whole party was talking about Newsroom. I want to be semi-informed as to what's going on. If I don't know then I can't contribute, and come off as pretentious.
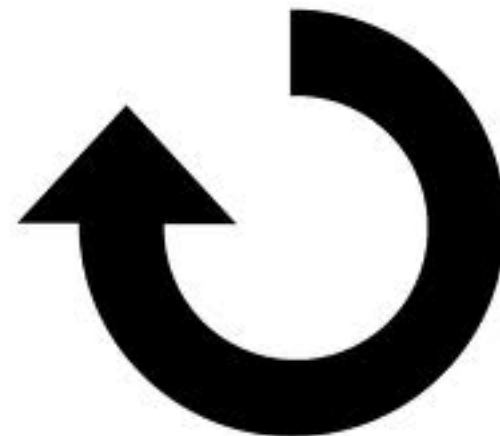Frank, Philadelphia
Newsroom

I use TV shows as a conversation piece, to relate to people. I don't want to recommend something if it's terrible. It's a reflection on my taste in shows..
Stan, Cincinnati
The Borgias

# Viewers Require Continuous Activation to Drive Intent & Top of Mind Awareness

Continuous prompts to consider new programs may be an increasingly critical factor in fighting for viewer attentiveness vs. other media options.

Repeated exposure, different types of content and reminders in the digital environment appeared to be a factor in lighting up interest and activating familiarity with a program.

Qualitative learning, Ipsos Consumer Journey Study, Viewing Habits on Path to TV Premiere Selection. Cable & Network Viewer IDIs July – October 2012.

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# Viewers Engage With Content Online Prior to Tune-In

## Actions Taken Prior to Tune-in

| Action | Value |
|---|---|
| Watched video clips of or about the show online (not a full episode) | 28% |
| Used a search engine to look for information about the show | 25% |
| Searched for additional online videos related to the show | 13% |
| Visited the show website to find out more about it | 20% |
| Visited the network website (e.g., nbc.com, cbs.com, etc.) | 20% |
| Went to a fan site or online forum about the show | 9% |
| Posted about the show on a social network site, blog or fan site | 9% |
| Downloaded an app related to the show | 6% |
| Talked to other friends/family about the show | 37% |
| Talked to my spouse/significant other about the show | 27% |
| Talked to others in my household about the show | 26% |
| None of these | 15% |

Searched (Net) 32%

Visited Show / Network Site (Net) 32%

Any Online Action (Net) 62%

Talked to Others (Net) 58%

# Viewers Look for Official Promos or Trailers First: Video Content Highly Influential in Deciding to Watch

## Types of Info Want to See/Hear First

| Would want to see or know... | FIRST | SECOND | THIRD | NET: 1ST/ 2ND/3RD |
|---|---|---|---|---|
| Official TV show promo or trailer | 31% | 14% | 10% | 55% |
| Official plot summary | 16% | 14% | 10% | 40% |
| The lead actor/actress | 12% | 14% | 12% | 38% |
| Sneak peek previews (not official trailer) | 9% | 13% | 12% | 34% |
| Opinions of people I know | 8% | 11% | 10% | 28% |
| The network the show is on | 6% | 7% | 11% | 24% |

# Search Is Used to Find Multiple Types of Information About a Show

## Info Searched for Prior to Tune-in

| | |
|---|---|
| Information about the plot | 70% |
| Date/time of the premiere | 66% |
| Official trailer/promo | 57% |
| Information about the cast | 48% |
| Reviews | 37% |
| Other | 3% |
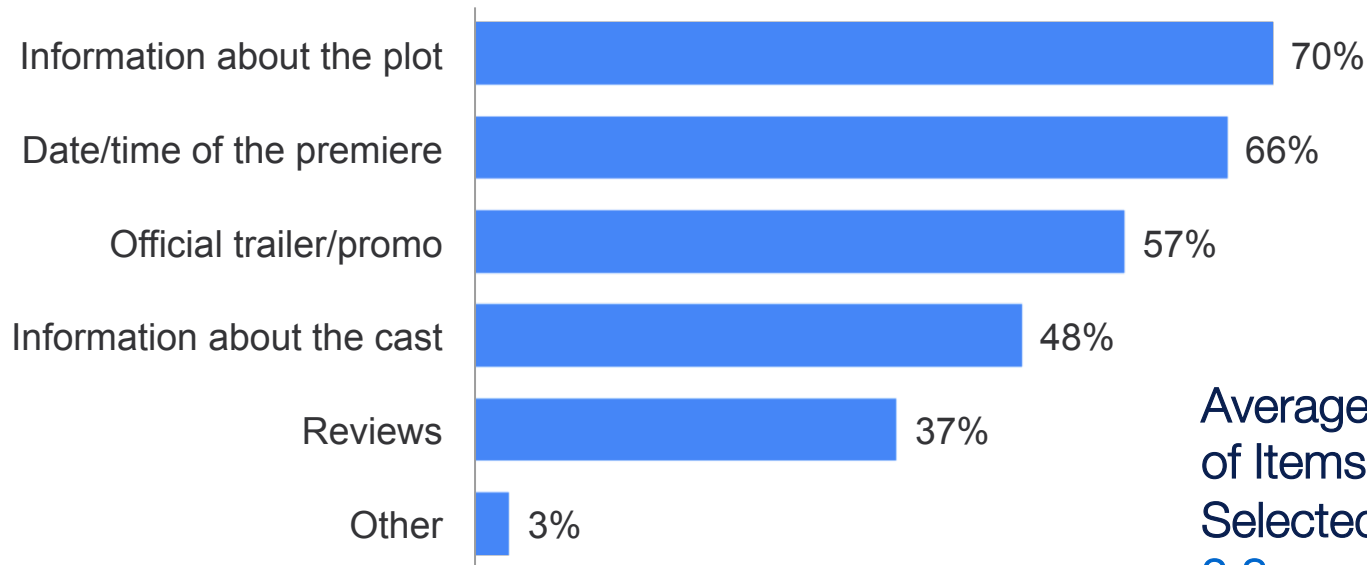
Average Number of Items Selected: 2.8

Search is important to pre-premiere 'comprehension' needs

(PRE-PREMIERE LOOP) Base: Searched, n=201
(Q14D) What specific information did you search for? Select all that apply.
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# Attitudes Toward Online Advertising

## Online Advertising Attitudes
### Those who responded 'strongly agree' or somewhat agree'

| Statement | % |
|---|---|
| I'm likely to pay attention to TV show ads while on an online video site | 43% |
| I'm more likely to search for info or visit a website after seeing an online ad compared to other ads | 45% |
| Online ads provide info or footage I haven't seen on TV | 48% |
| Online ads help to make me aware of shows airing on TV channels I don't regularly watch | 58% |
| Seeing a TV promo online or on TV has the same impact on my decision to watch the show | 59% |

0%  10%  20%  30%  40%  50%  60%  70%

**Online advertising can provide additional content, information, and prompt further action**

# Actions Taken After Exposure to Online Ads

| Online Video | Mobile Video | Online Search | Mobile Search | Online Banner |
|---|---|---|---|---|
| • Watched the show | • Made a "mental note" to watch the show | • Visited an entertainment website | • Made a "mental note" to watch the show | • Made a "mental note" to watch the show |
| • Made a "mental note" to watch the show | • Read reviews | • Watched the show | • Read reviews | • Watched the show |
| • Visited an online video website | • Thought more favorably about the show | • Made a "mental note" to watch the show | • Visited an entertainment website | • Read reviews |
| • Visited a TV network website | • Recommended the show to others | • Used a search engine to find more information | • Visited a social networking site | • Used a search engine to find more information |
| • Thought more favorably about the show | • Watched the show | • Read reviews | • Visited an online video website | • Visited a TV network website |

Base: Floating base by source; n=94-407
(Q34) Which of the following actions, if any, did you take as a result of seeing online advertising for a new TV show in the past few months?
Please select all that apply.
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# Consideration Milestone: Can I Sell the Show to Co-viewers? Will We Watch It?

My girlfriend, who is not a fantasy person, was really excited about it. She's a tough critic, and that didn't seem like something she'd be into but she was way into it. She wanted to watch it with me.

Aaron, Chicago
Game of Thrones

My wife didn't care about watching it so I didn't watch right away, not on the first night.
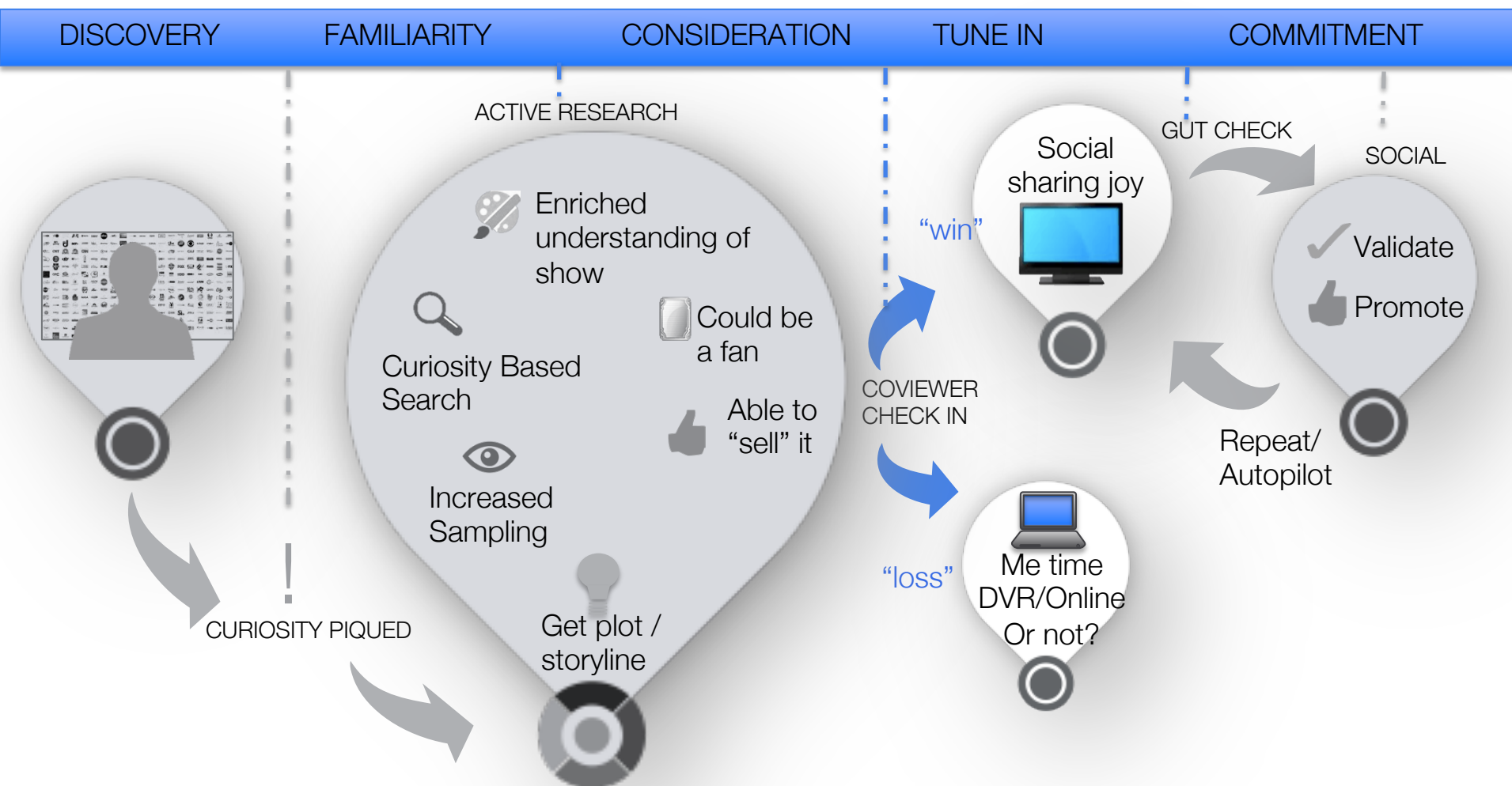Kavan, Los Angeles
Anger Management

Didn't want to watch because it was outside the routine of what we watch. New shows require a lot of interest and time. Is it worth watching something new when we already have something tried and true
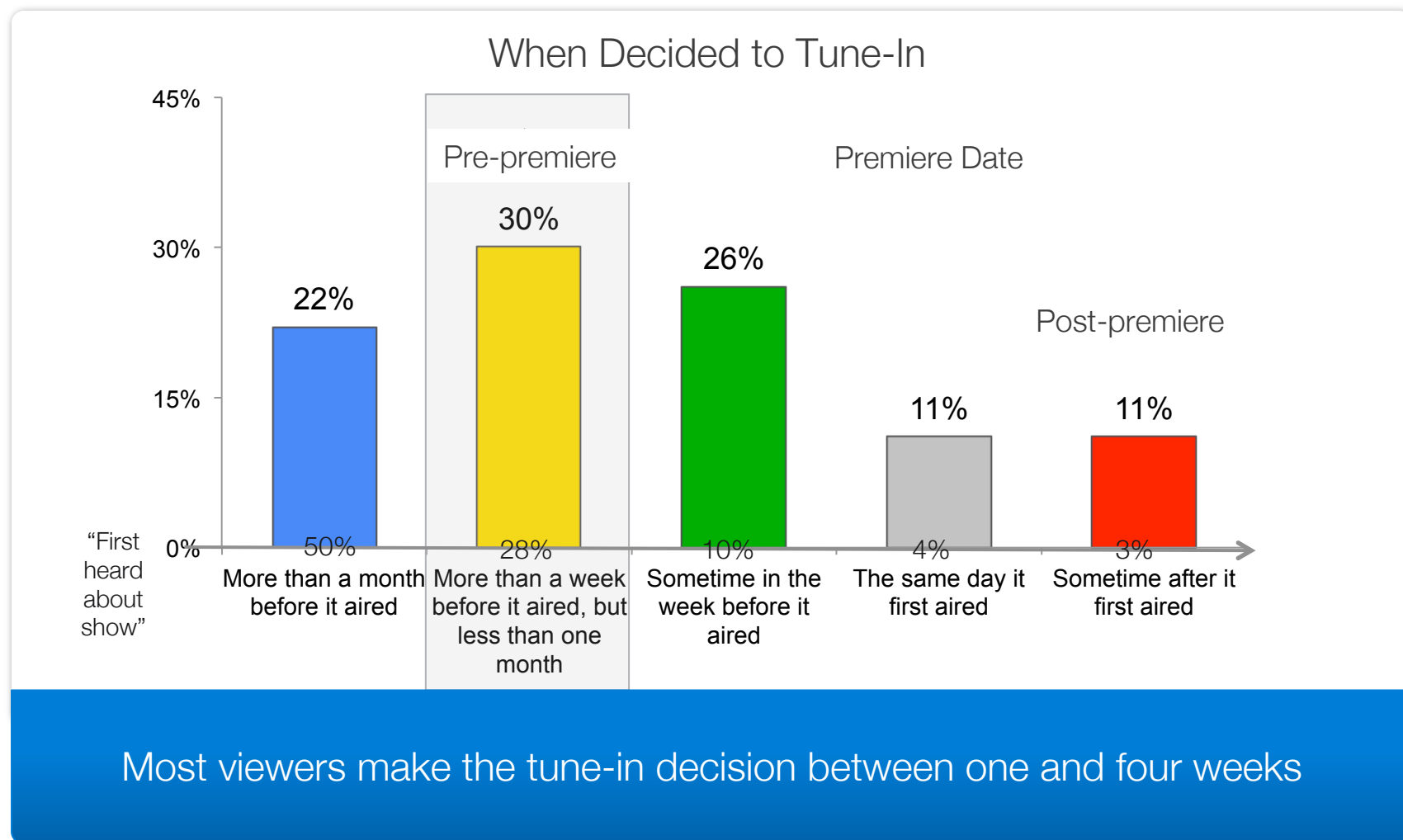Mitchell, San Francisco
New Normal

Jen says this is something she wants to watch, which is unusual. I was interested, but her interest made it something to definitely check out.
Nick, Philadelphia
Newsroom

# Tune In

| DISCOVERY | FAMILIARITY | CONSIDERATION | TUNE IN | COMMITMENT |
|---|---|---|---|---|

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# The Premiere Viewing Window Has Stretched Pre- and Post Live Broadcast

## When Tuned-In to Premiere

Pre-premiere
16%

Premiere Date
40%

Post-premiere
20%

8%

45%

30%

15%

0%

- Previewed full episode online/On Demand before it first aired on TV — 16%
- Live, when it first aired on network — 40%
- The same day it first aired, but not live — 16%
- Sometime after the first day it aired — 20%
- I missed the first episode, but have watched later episodes — 8%

**28% watch their first episode of a TV show in the post-premiere time frame**

Base:   Floating base by show, n=210-430
*Aggregate show data = represents all shows watched by a respondent, n=5674
(Q4) For each show, please indicate when you watched the first/premiere episode.
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# Watching "Live" Accounts for Less than Half of Typical Viewing Time for Primetime Broadcast TV
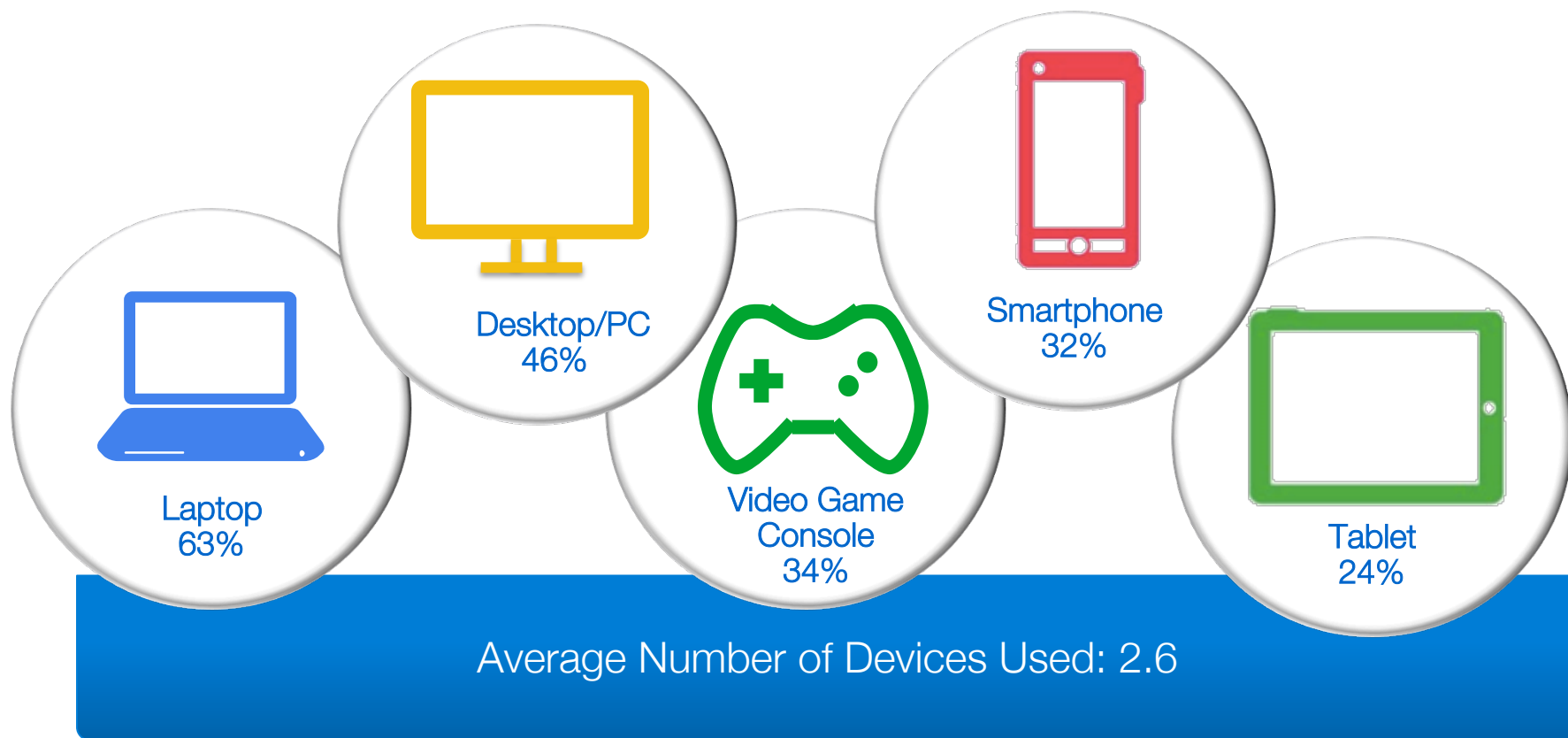
## Share of How Spend Time Watching Primetime TV



Watched online 19%

Watched On Demand 12%

Watched "live" 42%
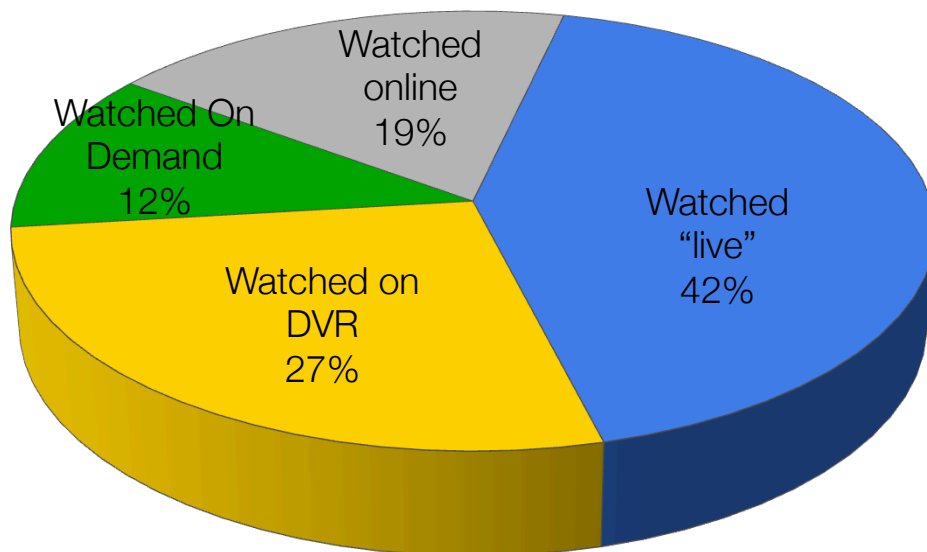
Watched on DVR 27%

|  | Have DVR in HH | Do not have DVR in HH |
|---|---|---|
| Watched "live" | 38% | 56% |
| Watched on DVR | 36% | - |
| Watched On Demand | 11% | 16% |
| Watched online | 15% | 30% |

Viewers without DVRs still watch a significant amount of TV online

# Nearly All Viewers Currently Use Another Device to Watch TV Online

## Devices Currently Used to Watch TV Online



Laptop
63%

Desktop/PC
46%

Video Game
Console
34%

Smartphone
32%

Tablet
24%

**Average Number of Devices Used: 2.6**

# 1st Tune-In Milestone: Cast Off or Continue Watching?

> The next night, I watched it again with Dana. We both liked the show and thought it was funny. If we didn't both like it, that would be a deal breaker.
> Elizabeth, Boston
> The New Normal

> I'll be more likely to watch it with my roommates. Want to get roommates involved so I'll DVR it [instead of just Hulu.]
> Molly, San Francisco
> The Mindy Project

> Everyone is talking about the show. I'm thinking I really want to be into this show
> Aaron, Chicago
> Game of Thrones

> Talking to my parents about it and watching it together was the best result

> Jen really liked it. I was nauseated. I searched Google News to check out different reviews from different outlets, trying to find a positive spin. I want to like it because of Jen.
> Nick, Philadelphia
> Newsroom

> [After I watched] I talked to boyfriend Eric about it. I wanted him to watch and tell me if he liked it. He didn't and looked up reviews to show me that the reviews weren't great. I have since grown bored with the show and stopped watching a few weeks ago.
> Jessica, Chicago
> Animal Practice

> I really wanted to like the show after hearing other friends like it. I wanted a show to talk to friends about; it's fun to share tense moments.

> Told my other roommates about Revolution – told them to watch it.
> Reed, Boston
> Revolution

# Commitment

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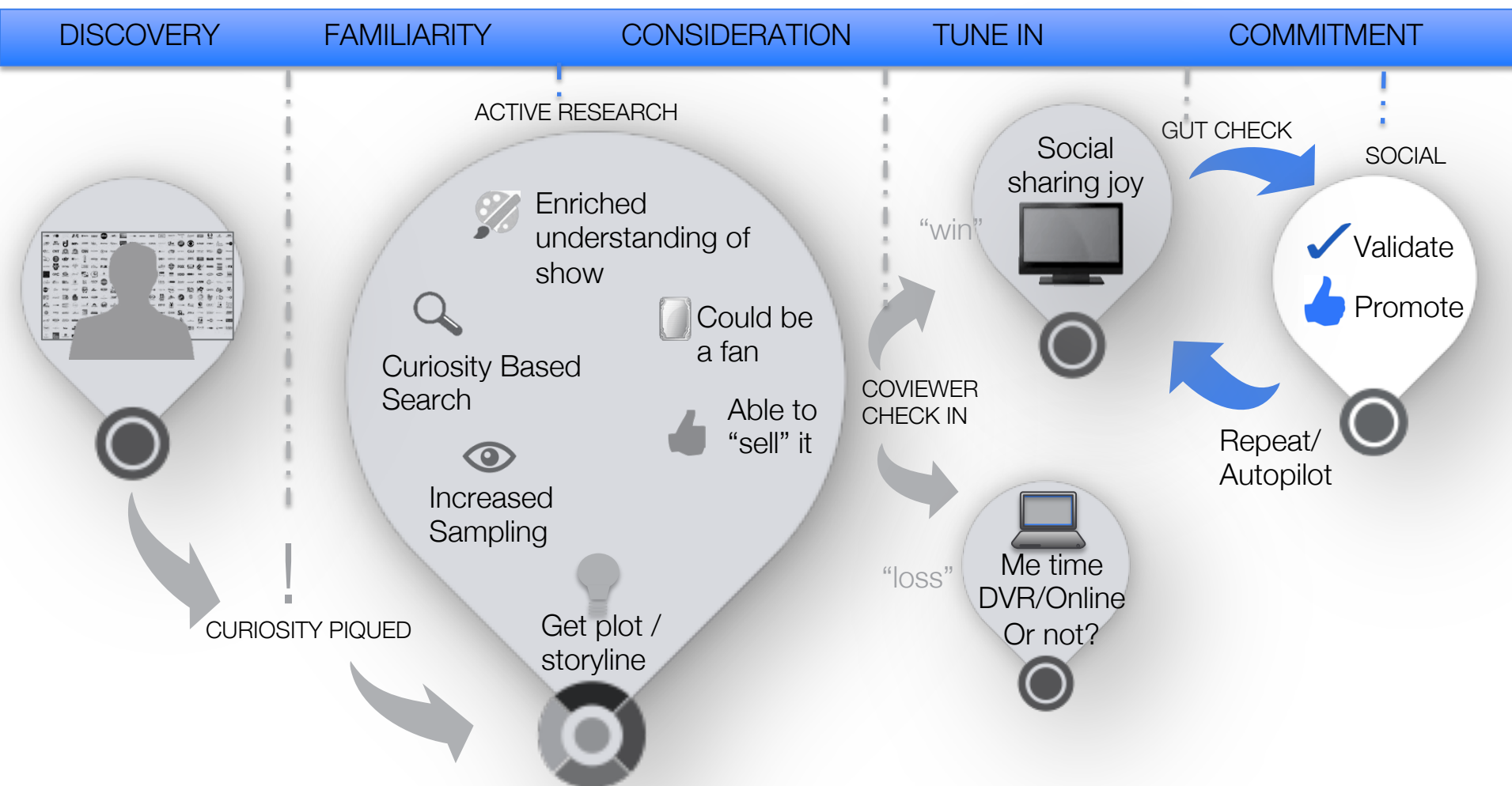
# Passing the Test vs. Making the Grade

Indecision on viewing and elusive premiere intent appeared to carry on past the first-view:

- Few people go into a series premiere thinking it's going to connect with them enough to become repeat viewer.
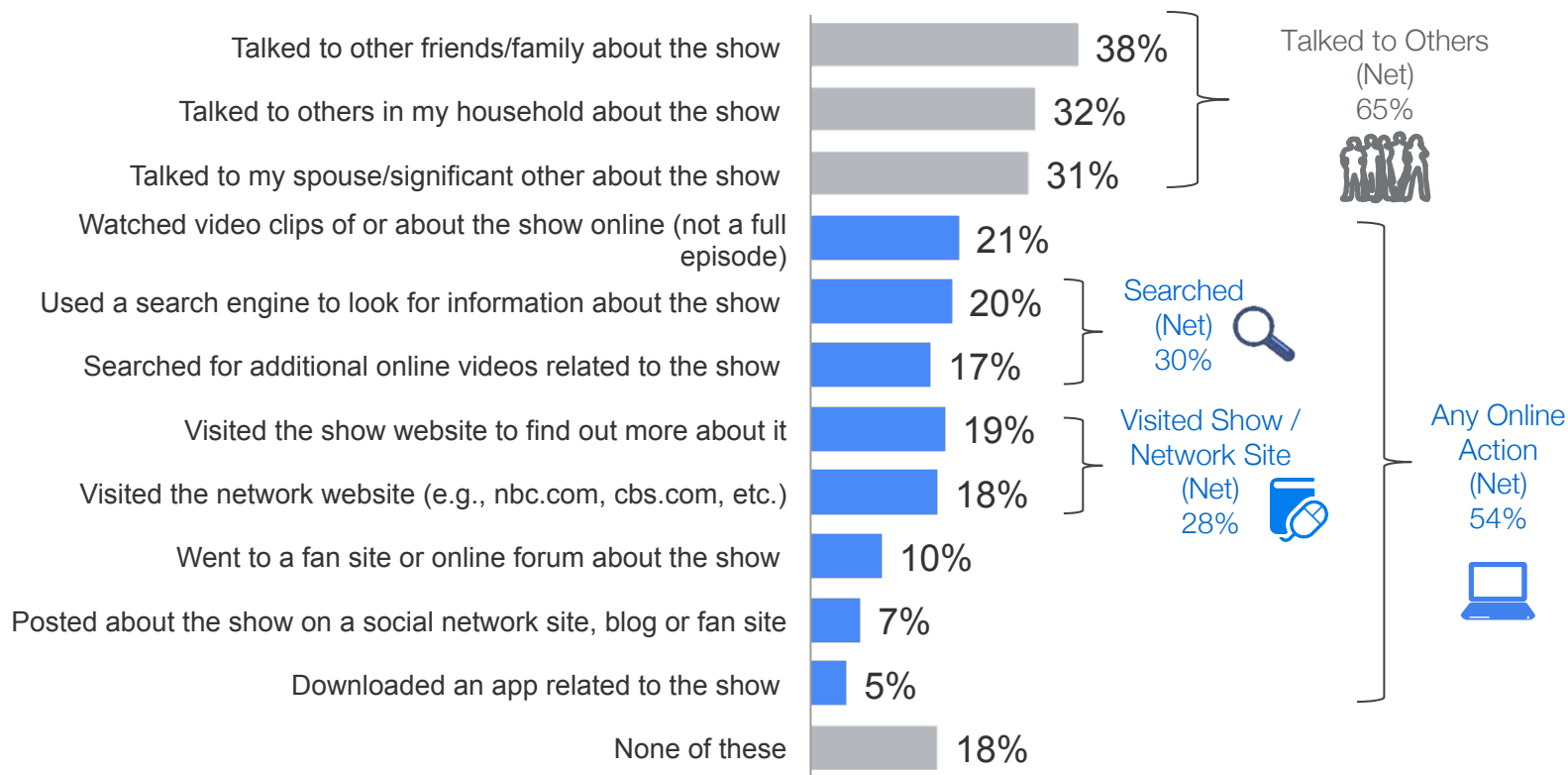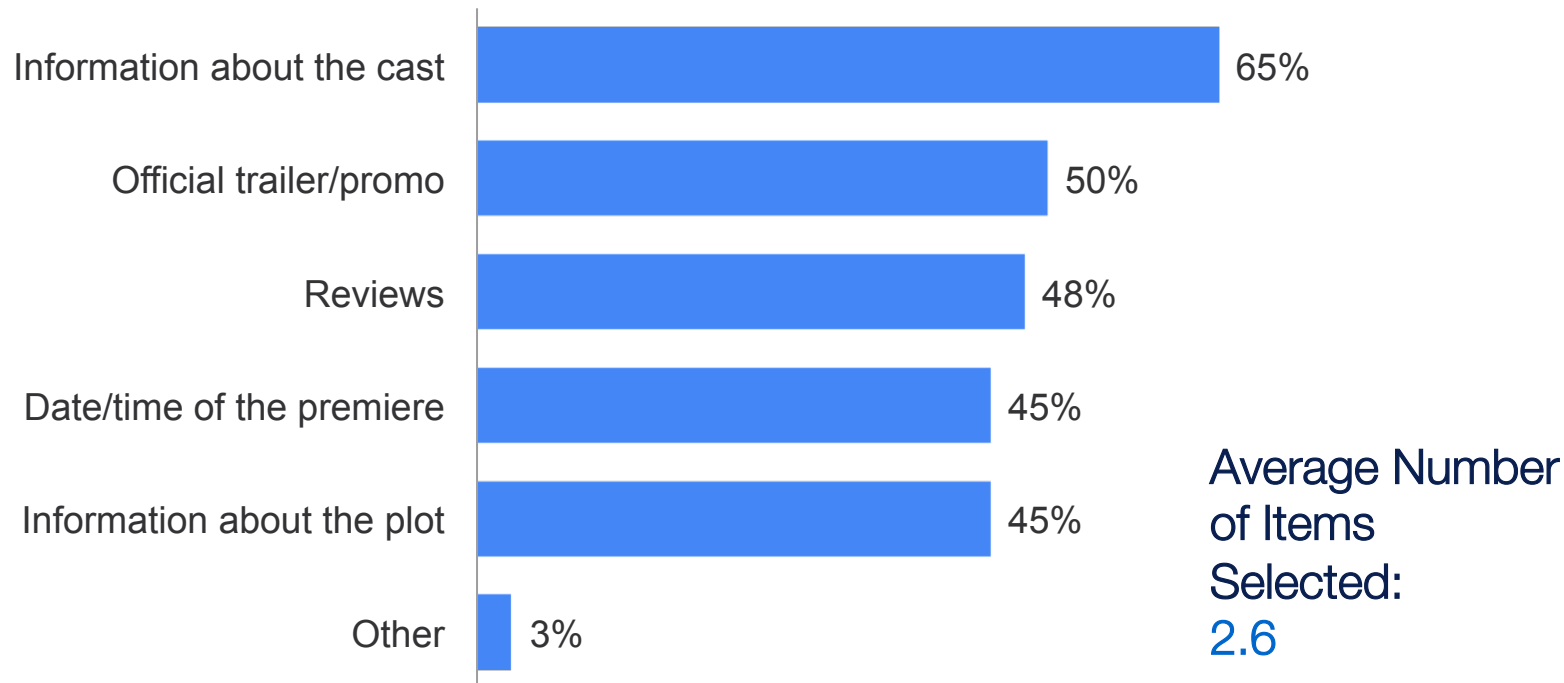- Positive first view appeared to be more of a "passing the first test" moment.
- Views of others, repeated proof of show quality over time and co-viewing potential all played a role in reinforcing a "thumbs-up" of longer term commitment.

Qualitative learning, Ipsos Consumer Journey Study, Viewing Habits on Path to TV Premiere Selection. Cable & Network Viewer IDIs July – October 2012.

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# Actions Taken Post Tune-in

Talked to other friends/family about the show — 38%
Talked to others in my household about the show — 32%
Talked to my spouse/significant other about the show — 31%

**Talked to Others (Net) 65%**

Watched video clips of or about the show online (not a full episode) — 21%
Used a search engine to look for information about the show — 20%
Searched for additional online videos related to the show — 17%

**Searched (Net) 30%**

Visited the show website to find out more about it — 19%
Visited the network website (e.g., nbc.com, cbs.com, etc.) — 18%

**Visited Show / Network Site (Net) 28%**

**Any Online Action (Net) 54%**

Went to a fan site or online forum about the show — 10%
Posted about the show on a social network site, blog or fan site — 7%
Downloaded an app related to the show — 5%

None of these — 18%

## The majority of viewers talked about the show after watching it and sought out more info online

# Info Searched for Post Tune-in

Information about the cast — 65%

Official trailer/promo — 50%

Reviews — 48%

Date/time of the premiere — 45%

Information about the plot — 45%

Other — 3%

**Average Number of Items Selected:**
**2.6**

Searching for cast info topped the list post tune-in

POST-PREMIERE LOOP) Base: Searchers, n=40 *CAUTION
(Q22D) What specific information did you search for? Select all that apply.
Ipsos Consumer Journey Study, Viewing Habits on Path to TV Premiere Selection. Broadcast TV Quantitative Findings, December 2012

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# 2ⁿᵈ Tune-In Milestone: Social Verification

After a few episodes, I Googled "Go On reviews" to see what others are thinking about the show.
Marc, Boston
Go On

I wish I had started watching it earlier so I could have had others to talk to about it.
Tyler, Los Angeles
Game of Thrones

I didn't like the Newsroom characters enough to follow it yet. I wanted to see what trusted opinions were saying about it. I Googled "Newsroom" to see what people are saying
Katie, Cincinnati
Newsroom

I think the show is hilarious, but I'm disappointed more people aren't talking about it on Facebook. I want to share the experience with others.
Darzell, Chicago
Animal Practice

As the show continued, I found out other people had similar thoughts; not as good as I thought it would be.
Frank, Philadelphia
Newsroom

Talked to people at work about it, but no one was watching it. Disappointed.
Marc, Boston
Go On

Google™ | Thank you!

# Appendix

# Emerging Viewer Types

**"Professional" Critics**
Middle-age professionals, successful and digital savvy, have limited time and demand quality. Characterized by their skepticism, interest in keeping up with media & pop culture and drawn to immersive story driven, and cerebral shows.

**Social Seekers**
Digital and broadcast TV worlds are more seamless for these viewers, who seek programming that can connect them with others, either in person or online – all to create an immersive, social and sometimes escapist experience..

**Active Info Seekers**
"Tell me more"
Understand to Judge

**Young Digital Nomads**
Born into "get what I want – when I want it" media landscape, these college age and 20-something's are much more likely to go 'off the grid', snacking on TV media clips, viewing online or through alternative viewing means (laptop, Netflix, Hulu, Roku, etc.)

**Content Snackers**
"Show me more"
Seeing is Believing
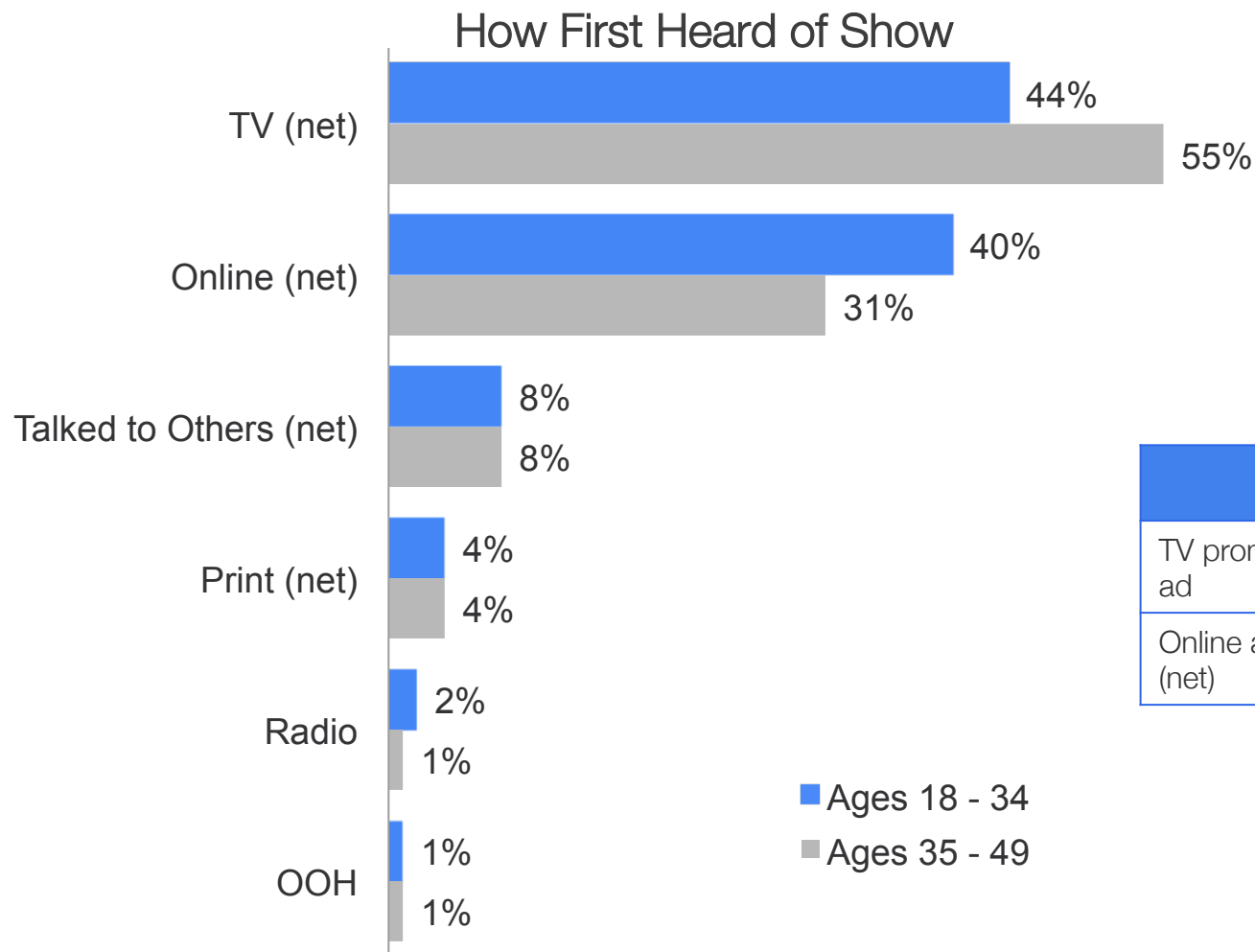
**Time Fillers**
Heavily engaged with TV programming and online entertainment information, these viewers put television at the center of their universe, but appear to remain more on "autopilot".
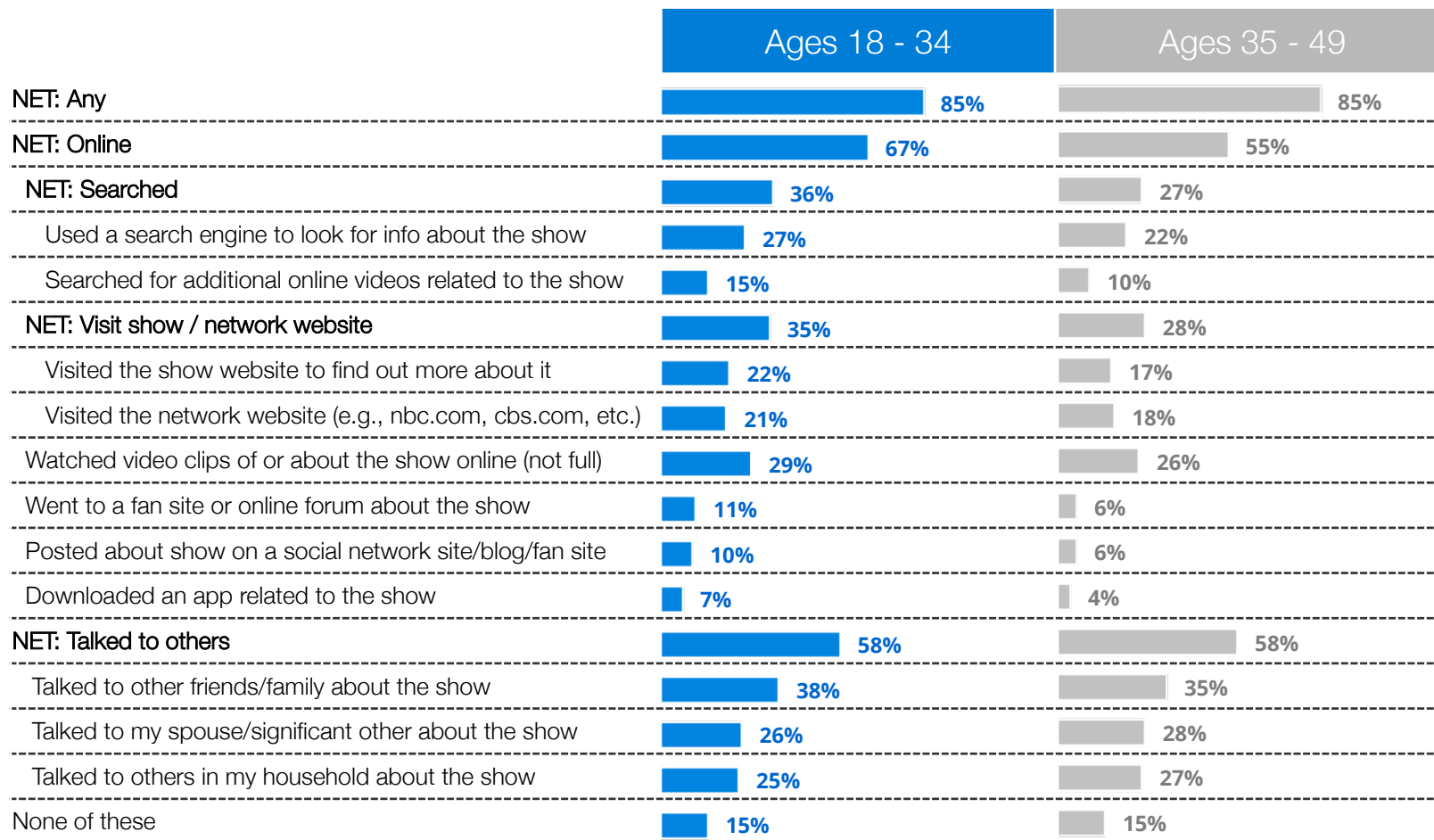
Qualitative learning, Ipsos Consumer Journey Study, Viewing Habits on Path to TV Premiere Selection. Cable & Network Viewer IDIs
July – October 2012.

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# Initial show awareness online nearly as often as from watching TV among younger viewers

## How First Heard of Show

| Source | Ages 18 - 34 | Ages 35 - 49 |
|--------|--------------|--------------|
| TV (net) | 44% | 55% |
| Online (net) | 40% | 31% |
| Talked to Others (net) | 8% | 8% |
| Print (net) | 4% | 4% |
| Radio | 2% | 1% |
| OOH | 1% | 1% |

■ Ages 18 - 34
■ Ages 35 - 49

|  | Ages 18 - 34 | Ages 35 - 49 |
|--|--------------|--------------|
| TV promo/ad | 39% | 53% |
| Online ad (net) | 18% | 15% |

(PRE-PREMIERE LOOP) Base: n=450 (18-34), n=340 (35-49)
(Q17) As best you can recall, which of these was the way you first heard about this show? Please select one.
Ipsos Consumer Journey Study, Viewing Habits on Path to TV Premiere Selection. Broadcast TV Quantitative Findings, December 2012

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# Taking action online was more commonplace among a younger audience

## Actions Taken Prior to Tune-in

| | Ages 18 - 34 | Ages 35 - 49 |
|---|---|---|
| NET: Any | 85% | 85% |
| NET: Online | 67% | 55% |
| NET: Searched | 36% | 27% |
| Used a search engine to look for info about the show | 27% | 22% |
| Searched for additional online videos related to the show | 15% | 10% |
| NET: Visit show / network website | 35% | 28% |
| Visited the show website to find out more about it | 22% | 17% |
| Visited the network website (e.g., nbc.com, cbs.com, etc.) | 21% | 18% |
| Watched video clips of or about the show online (not full) | 29% | 26% |
| Went to a fan site or online forum about the show | 11% | 6% |
| Posted about show on a social network site/blog/fan site | 10% | 6% |
| Downloaded an app related to the show | 7% | 4% |
| NET: Talked to others | 58% | 58% |
| Talked to other friends/family about the show | 38% | 35% |
| Talked to my spouse/significant other about the show | 26% | 28% |
| Talked to others in my household about the show | 25% | 27% |
| None of these | 15% | 15% |

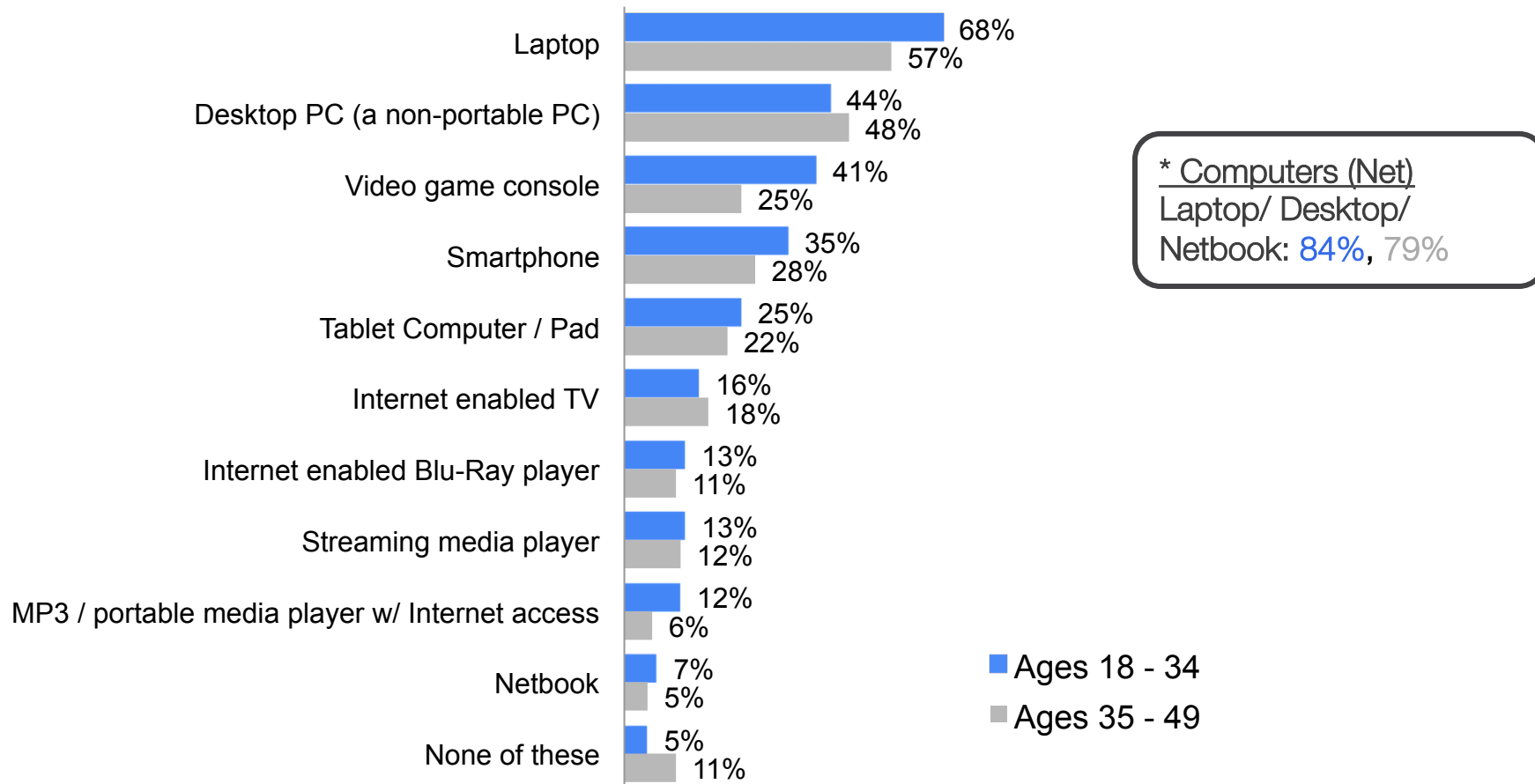(PRE-PREMIERE LOOP) Base: n=455 (18-34), n=345 (35-49)
(Q14B) Now, which of the actions below did you actively take regarding before you watched the first episode?
You may select as many or as few as apply.
Ipsos Consumer Journey Study, Viewing Habits on Path to TV Premiere Selection. Broadcast TV Quantitative Findings, December 2012

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