BE STILL MY VIEWING HEART:
An exploration of the emotional bond viewers have with television programming and the impact on brands & advertisers
Riding The Tide Of Emotions


VAB has often demonstrated the undeniable ability of TV to drive business growth, but in this report we explore the emotional impact of television. Television programming satisfies our human emotional need for connection; a connection not only to the characters and stories that resonate with us, but also the desire for a shared experience with our community.

The emotional bond many of us feel with Television programming is made clear by...

- The amount of time & attention we give it - 5+ hrs a day, double what we spend eating, drinking, shopping and viewing Facebook, *combined*
- Our insatiability for more content from the shows we love - 52 Million Facebook Followers of the top 5 shows alone
- The urgency we feel to rejoin the stories we loyally follow - 88% of primetime is viewed live

Emotionally compelling, character-driven premium programming fosters an ideal environment to showcase an advertisers message. But why is this important for advertisers?

- 90% of human decision making is dictated by emotion
- 85% of consumer purchases are driven by emotional attachment
- And 58% of consumers believe TV is where they are most likely to find advertising that makes them feel emotional (a figure 6x greater than that of Social media)

So, make like Olivia Pope and grab a glass of wine and popcorn, get cozy on the couch, and learn about the emotional side of TV programming and its benefits to advertisers.
The Emotional Journey

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The Indicators of Emotional Engagement
Measures to identify how emotionally attached a viewer is to content
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Measures to identify how emotionally attached a viewer is to content

**Time Spent & Attention**
In our increasingly busy lives, time is our most precious resource - focusing our attention on something signals commitment, loyalty, and interest.

**Viewer Receptivity & Mindset**
People go to devices and platforms with an established expectation for their experience, ranging from functional to the more emotionally charged.

**Insatiable Appetite for More**
More anticipation, more conversation, more spoilers, more episodes, more related content.

**Attachment to Characters**
The willingness of viewers to repeatedly open their homes and hearts to the characters they love - and love to hate!
Time Spent & Attention

In our increasingly busy lives, time is our most precious resource - focusing our attention on something signals commitment, loyalty, and interest.
Over The Course Of a Year, The Average American Devotes 1,908 Hours To Television

If Viewed Consecutively, He Would Spend 80 Days - 20% of the year - Watching TV

Source: Nielsen Total Audience Report, Q1 '17, P18+; TV = Live TV + DVR + Time Shifted
Although On-The-Go Viewing Is On The Rise, Viewers Crave The Experience Of Watching On The Big Screen

Monthly Hours Watching Video
TV, PC, Smartphone

<table>
<thead>
<tr>
<th>Persons 2+</th>
<th>Millennials 18-24</th>
<th>Millennials 25-34</th>
</tr>
</thead>
<tbody>
<tr>
<td>159</td>
<td>72</td>
<td>102</td>
</tr>
<tr>
<td>+7x</td>
<td>+2x</td>
<td>+3x</td>
</tr>
</tbody>
</table>

Source: Nielsen Total Audience Report, Q1 '17; TV = Live TV + DVR + Time Shifted
Adults Dedicate More Time On the TV Screen Each Day Than They Do Eating/Drinking, Shopping, Talking On The Phone, Emailing, And Viewing Netflix, YouTube, And Facebook Combined

Time spent per day (Adults)

- Watching TV: 5 hours 18 minutes
- Eating and drinking: 1 hour 18 minutes
- Shopping: 42 minutes
- Watching Netflix: 30 minutes
- Watching YouTube: 24 minutes
- Caring for household members: 24 minutes
- Telephone calls, mail, and e-mail: 18 minutes
- Organizational, civic, and religious activities: 12 minutes

Source: Nielsen Total Audience Report, Q1 '17, P18+; TV = Live TV + DVR + Time Shifted, reflects activity on TV set only - computer/laptop and mobile viewing not included; Bureau of Labor Statistics, 2016 Annual Average Hours Per Day in Selected Activities, Reflects P15+; ComScore MyMetrix - Desktop+Mobile, July 2017, Average Monthly Hrs per Visitor, P18+
TV Viewers Are Committed & Invested In The Content, Spending More Time Watching It Than Other Video Platforms

Average Monthly Time Spent
Minutes per viewer - Adults 18+

The average length of a session with TV is 43% longer than with YouTube and 240% higher than with Facebook, offering more potential for engagement

Sources: Nielsen Total Audience Report, Q1 '17, Live + DVR + Time Shifted, P18+, reflects activity on TV set only - computer/laptop and mobile viewing not included; comScore My Metrix Desktop + Mobile “Average Min Per Visitor”, July 2017
The Ultimate TV Fans?

**Millennials** Spend More Time Watching TV Each Day Than They Do Eating/Drinking, Shopping, And Using YouTube And Instagram Combined

Time Spent per day (Millennials)

Source: TV: Nielsen Total Audience Report, Q1 ’17; TV = Live TV + DVR + Time Shifted, A18-34, graph reflects activity on TV set only - computer/laptop and mobile viewing not included; Bureau of Labor Statistics, 2016 Annual Average Hours Per Day, P20-34; ComScore MyMetrix, Desktop + Mobile, July 2017, P18-34
Millennials Spend 4x More Time Watching TV Than YouTube, the Largest Online Video Platform

Average Monthly Time Spent
Minutes per viewer - P18-34

Television 5,400
YouTube 1,163
Facebook 744
Instagram 518
Netflix 510
Twitch 498
Hulu 223
Amazon 112
Twitter 83
Snapchat 3

Sources: Nielsen Total Audience Report, Q1 ’17, Live + DVR + Time Shifted, weighted average for P18-34, reflects activity on TV set only - computer/laptop and mobile viewing not included; comScore My Metrix. “Average Mins Per Visitor”, July 2017; TV = Ad-Supported Cable + Broadcast TV
How Does YouTube Compare to TV?

Does YouTube Offer the Same Experience or Environment?
YouTube Offers a Completely Different Viewing Experience From Television

The YouTube Viewing Experience Is Highly Fragmented

TV viewers spend more time with a more focused set of programs, fostering deeper engagement and storytelling

Weekly time spent on the 10 most viewed networks

292.5 Billion minutes viewed across 635 programs

37.2 Billion minutes viewed across 700,000+ channels
The Indicators of Emotional Engagement:
In Their Increasingly Busy Lives, Americans Take Time Each Day
to Sit Back, Relax and Watch Hours of TV

**Time Spent & Attention**
*If viewed consecutively, the average American would devote 80 days - 20% of their year - to watching TV*
Receptivity & Mindset

People go to devices & platforms with an established expectation for their experience, ranging from functional to the more emotionally charged
Consumers Prefer Watching Content on a Television

They rely upon other devices for utility & functional benefits

% Who “Highly Enjoy” Viewing Content on Device

- Watching Video Content: 89%
- Messaging: 63%
- Emailing: 54%
- Social Media: 53%

Primary Activities on Device:
- Search/Surf
- Social Media
- Emailing
- Streaming Music
- Streaming Video
- Gaming
- Shopping
- News/Weather Updates
- Maps/Directions
- Social Media

Source: CRE and Hub Research custom study “New study finds that TV outperforms Digital platforms in viewer ad attention & recall” 6/26/16; 2016 GfK MRI Doublebase - primary uses of devices, total population
Not Surprisingly, Television Is The Platform That Provides The Strongest Opportunity For Storytelling and Emotional Engagement

Entertainment & Escapism
- 82% enjoy it for pure entertainment
- 6 core reasons: for comfort, to unwind, to connect, to experience, to escape, and to indulge*

Connections Over Content
- 82% of users cite making connections as the best thing that’s happened to them since joining Facebook - finding old friends/acquaintances, making new friends, creating business opportunities
- 10% cite content, such as news updates and stories

Real-time news and second screening (of televised) events
- 86% of Twitter users use it primarily for keeping up with news
- 28% of users chat live events

Music, quick-hit humor and how-to’s
- 94% of the top 250 viewed videos are music

Source: American Press Institute, “How People Use Twitter” Sept 2015; Comcore Key Measures, July 2017; *Thinkbox “Screen Life: TV in Demand”
As A Pure Entertainment Platform, Television Programming Is Able To Elicit A Wide Array of Emotions
TV Programs Evoke Emotions Ranging From Suspense To Elation

Top 250 TV Programs, grouped by genre

Drama 33%
Comedy 18%
Participatory/Reality 18%
News 15%
Sports 10%
Documentary 6%

Hope, Comradery, Elation, Despair
Uncertainty, Angst, Empowerment
Absurdity, Surprise, Escape
Awe, Understanding, Enlightenment, Curiosity
Fear, Suspense, Sadness, Relief
Joy, Delight, Relaxation

Source: Nielsen nPower, ranked on top 250 regular pgms (regular 3 or more t/c) ad-supported cable+english bdcst; total day; P2+; 1/2-8/6/17
And TV Content Taps Into Deeply Personal Topics And Brings Them Into Our Living Rooms

Delights with ideas on how to nourish family & friends

Provokes thinking and discussion about salient topics

Transports to exotic and aspirational travel destinations

Explores the relationship dynamics viewers experience in their own lives

Enables self-discovery and personal exploration

 Fuels the passions of sports fandom

Inspires the creation of a warm home environment that reflects personal style

Awes and dazzles with the fashions, glitz, and glamor of Awards season
In Contrast, The Most Heavily Viewed Videos On YouTube Focus Largely On A Single Genre
While music does elicit emotion, it lacks many of the basic elements required for true sustained emotional engagement: A compelling storyline, depth of character development, and the ability to develop a story over time.
A Look At The Top Pieces of Video On Each Platform Illustrates The Disparity In Storytelling and Depth Of Emotion

**YouTube**

2017 Top YouTube content
- Despacito
- Wiz Khalifa
- Gangnam Style
- Justin Bieber

**2017 Top Television content**
- The Big Bang Theory
- This Is Us
- Bull
- The Voice

Sources:
TV: Programs rank in top 10 Entertainment Programs, Nielsen, P2+, 9/16/17-5/24/17: The Big Bang Theory, This Is Us, The Voice, Bull
YT: Ranking based on highest # of views, through 9/1/17 - Despacito, Gangnam Style, Justin Bieber/Sorry, Wiz Khalifa/See You Again
The Indicators of Emotional Engagement:
As A Pure Entertainment Platform, Television Programming Is Able To Elicit A Wide Array of Emotions

**Time Spent & Attention**
If viewed consecutively, the average American would devote 80 days - 20% of their year - to watching TV

**Viewer Receptivity & Mindset**
People rely on TV for comfort, to unwind, to connect, to experience, to escape and to indulge

**Insatiable Appetite for More**

**Attachment to Characters**
Insatiable Appetite for More

More anticipation, more conversation, more spoilers, more episodes, more related content
“Insatiable Appetite for More” Means….

“Pre”
Urgency, anticipation, planning, & excitement for the content

“During”
Sustained interest & Immediate need to share

“Post”
Compelled to seek out MORE content & engage with communities

“Interest Over Time”
Sustained relevance
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The Anticipation For Favorite Programs And Events Inspires Friends To Gather In Viewing Parties

Custom Invitations...

...A Range of Ideas & Inspiration...

...And TV Themed Food!

martha stewart

epicurious

FOOD & WINE

POPSUGAR

TV Guide: Throw a Top Rated Fall Viewing Party

A TV Viewing Party Menu

Viewing Party Recipes

How to Throw the Ultimate Fall TV Viewing Party

Throwing A Party For Your Favorite TV Shows
For Many, The Anticipation Is So Great That They Need To Know The Storylines And Fate Of Their Favorite Characters Immediately

“I'm just too impatient to wait, if I know there's info, I have to know it.”

“I just can't handle the shock, my heart can't take it.”

- Reddit users

The above sites receive 64 Million monthly unique visitors who spend a combined total of 248 Million minutes on these sites a month

Source: ComScore, August 2017, Media Metrix Report, P2+ Desktop + P18+ Mobile
The Majority Of Program-Related Tweets *In Between* Live Airings Are Expressions Of Anticipation For “What’s Going To Happen Next”

Looking at what viewers are talking about while they await the next episode, we see their excitement and urgency for upcoming episodes.

Source: Nielsen “From Live to 24/7: Expanding Twitter Engagement Beyond The Live Airing” - total tweets collected 7/8/14-10/22/14, tweets reflected were captured for a drama program on days without a live airing.
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Reflecting Their Excitement For The Programming, The Overwhelming Majority of Television Is Watched *Live*

Viewers are excited about watching their favorite programs

<table>
<thead>
<tr>
<th>% Live Viewing in Primetime</th>
<th>Adults 18-24</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live - 88%</td>
<td></td>
</tr>
<tr>
<td>Play-back - 12%</td>
<td></td>
</tr>
</tbody>
</table>

% Live - Other demos: P25-34, 86%; P35-49, 86%; P50+ 89%

Source: Nielsen, Base=DVR HHs; 9/21/15-7/24/16; Live/Same Day data
And TV Holds This Attention Throughout The Program

Across genres and broadcast/cable networks, audience fluctuation was less than 20% between the program’s beginning and end.

**Attention Over The Duration Of An Episode**

Source: P2+ Playback Time Period: Live+7 Days (+168 Hours) | TV; Designated Survivor, 10/5/16, minutes 1, 14,30,45,60; The Voice, 11/22/16 min 1,33,58,98,120; DWTS 10/24, 1,29,60,90,120; Bull, 11/15/16 min 2,15,30,43,57; Anderson Cooper 360 10/12/16 min 1,15,30,45,56; Parts Unknown, 10/11/17, min 1,13,30,45,60; NBC Sun Night Football 10/23/16, min 1,55,110,162,220; WWE, 9/25/17, min 1,15,30,45,60; Rick & Morty, 10/1/17, min 1,8,15,22,29; Broad City, 8/23/17, min 1,7,15,23,30

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**P2+ Ratings Change Over Time**

<table>
<thead>
<tr>
<th>Change</th>
<th>0.00</th>
<th>0.50</th>
<th>1.00</th>
<th>1.50</th>
<th>2.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>34</td>
<td>50</td>
<td>66</td>
<td>82</td>
<td>98</td>
<td>114</td>
</tr>
</tbody>
</table>

**Drama**
- Bull
- Designated Survivor

**Reality**
- Dancing with the Stars
- The Voice

**News/Documentary**
- AC 360
- Parts Unknown

**Sports**
- Sunday Night Football
- WWE

**Comedy**
- Rick & Morty
- Broad City
In Real-Time, Ad-Supported TV Moves Viewers To Share Their Experiences With Fan Communities And Friends
Ad-Supported TV Content Provokes More Real Time Conversation Than Any Other Platform

Top 10 Twitter Trending Topics - % by platform
Over a 4 week period

65% of Trending Topics were related to Ad-Supported TV

Other platform "program" highlights: Netflix - House of Cards, Sense8, The Get Down; Music - T-Wayne, Rake It Up; Online Radio - Most Requested Live (iHeart Radio); YouTube - Car Boys; HBO - HBO Boxing, Mommy Dead & Dearest, Real Time with Bill Maher, The Leftovers; Showtime - Twin Peaks; Starz - American Gods; PPV - UFC 212; Facebook Live - CFDA Awards; Snapchat - Ask Ethan & Grayson; WWE Network - WWE Backlash; Video Games - Injustice 2, Life Is Strange 2; Other streaming - E3

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:30p, 9:30p, 10:30p, 11:30p) during 4-week time period (5/15/2017 - 6/11/2017). Based on unique program counts. For the purposes of this chart, “program / content” is an all-encompassing definition for individual pieces of content on each platform (albums & singles for music, video games, channel on YouTube, live streaming and/or personality on a social media platform, etc).
At Least *Half* Of The Top 10 Trending Topics On Any Night Were Based on Ad-Supported TV Content

<table>
<thead>
<tr>
<th></th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
<th>Sunday</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overall</strong></td>
<td>81%</td>
<td>69%</td>
<td>66%</td>
<td>68%</td>
<td>51%</td>
<td>56%</td>
<td>78%</td>
</tr>
<tr>
<td><strong>8:30p</strong></td>
<td>65%</td>
<td>48%</td>
<td>40%</td>
<td>38%</td>
<td>35%</td>
<td>48%</td>
<td>78%</td>
</tr>
<tr>
<td><strong>9:30p</strong></td>
<td>85%</td>
<td>73%</td>
<td>68%</td>
<td>75%</td>
<td>55%</td>
<td>55%</td>
<td>80%</td>
</tr>
<tr>
<td><strong>10:30p</strong></td>
<td>85%</td>
<td>80%</td>
<td>80%</td>
<td>80%</td>
<td>58%</td>
<td>68%</td>
<td>80%</td>
</tr>
<tr>
<td><strong>11:30p</strong></td>
<td>88%</td>
<td>75%</td>
<td>78%</td>
<td>78%</td>
<td>58%</td>
<td>55%</td>
<td>73%</td>
</tr>
</tbody>
</table>

% of Top 10 Trending Topics That Are Based On TV Content (based on a 4-week average)

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:30p, 9:30p, 10:30p, 11:30p) during 4-week time period (5/15/2017 - 6/11/2017). Reflects four week average by day and time. Results include both “direct” and “related” TV topics.
In Contrast, There Is Less Immediacy For YouTube Content Than TV Programming
TV Programs Are More Than Twice As Likely To Be Watched Live/Same Day Than Newly Posted YouTube Videos - On Even The Top YT Channels

% of Views - Television & YouTube

The Majority Of YouTube Trending Content - Indicating Real Time Audience Engagement - Was From Television

Looking at 50 trending YouTube Videos over a 2 week period, over a quarter of them were popular content from television.

% of YouTube Trending Videos, by platform

- Ad-Supported TV: 27%
- General Entertainment: 19%
- Non-Ad Supported TV: 16%
- Humor: 12%
- Music: 10%
- Cinema/Film: 10%
- How-To: 4%
- Political: 2%

Source: VAB Custom Analysis of YouTube trending videos, 7/17/17-8/4/17
“Insatiable Appetite for More” Means….

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“Interest
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Sustained
relevance
Consumers Want To See More On The Screen Of The Stories and Characters They Love

Spinoffs & Extensions

- **NCIS**
- **CSI: Crime Scene Investigation**
- **Real Housewives**
- **Kardashians**
- **The Bachelor**

The Rise of “Fan Shows”

- **Talking Dead** has nearly double the audience of the #2 ranked YouTube Channel

Source: #2 YT Channel - ElRubiusOMG (by subscriber count), August 2017
They Also Want More **Off** The TV Screen - A Thirst For More Content And A Desire To Share Their Experience With Other Fans

The Top 5 Entertainment TV programs have a combined....

39,398 Reddit Followers
...top 5 YouTube channels have 1,492

13,012,100 pieces of Video Content on YouTube
...top 5 YouTube channels have 8,908,000

52,021,000 Facebook Followers
...top 5 YouTube channels have 42,600,000

600% increase in web traffic to the show’s sites after the new season began

Source: Data as of 9/8/17; Top TV programs based on Nielsen Television Index National Ranking Report - The Big Bang Theory, NCIS, Bull, This Is Us, Blue Bloods. Excludes Paid Political Programming; Breakouts; Specials; Programs 5 minutes or Less; Sustainers; Pre-premieres, For time period **9/19/16 - 5/24/17, Reddit followers are on Official program/channel subthread; Top 5 YT channels based upon total subscribers as of 7/24/17 - PewDiePie, HolaSoyGerman, ElRubiusOMG, Smash, Fernanfloo. Web traffic data is ComScore, total uniques in the months of October 2016 and July 2017
Similarly, Millennials Are Inspired To Seek Out More Content On The Programming They Love

Millennials’ (18-34) top 5 entertainment programs have a combined:

- 185,884 Reddit Followers
  ...top 5 YouTube channels have 1,492

- 25,965,000 pieces of Video Content on YouTube
  ...top 5 YouTube channels have 8,908,000

- 91,662,028 Facebook Followers
  ...top 5 YouTube channels have 42,600,000

- 454% increase in web traffic to the show’s sites after the new season began

Source: Top TV programs based on Nielsen Season To Date (10/16/17) for A18-34 - This is Us, Young Sheldon, The Voice, Empire, The Simpsons - Excludes Paid Political Programming; Sports; Breakouts; Specials; Programs 5 minutes or Less; Sustainers; Pre-premieres; Reddit followers are on Official program/channel subthread; Top 5 YT channels based upon total subscribers as of 7/24/17 - PewDiePie, HolaSoyGerman, ElRubiusOMG, Smosh, Fernanfloo. Web traffic data is ComScore, reflects measured programs, Simpsons & This is Us - total uniques in the months of August 2017 (before new season) and September 2017 (at start of new season)
In Contrast, Even Trending YouTube Videos - *The Most Buzzed About Content* - Prompted Little Further Engagement With The Channel
Trending Videos Had A Negligible Impact On Driving Interest For The Channel Or The YouTube Personality

VAB tracked 50 YouTube Trending Videos to understand the impact they had on the channel that posted them...

...did they inspire viewers to watch more of that creator’s content?
...did they spur an increase in channel subscribers or social following?

4% lift in views across the channel’s 3 most recently posted videos

< 1% lift in social followers or channel subscribers

Source: VAB Custom Analysis of YouTube trending videos, 7/17/17-8/4/17 - % lift in YT video content measured one day after the video trended
“Insatiable Appetite for More” Means....

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“Interest Over Time”
Sustained relevance
Compelling Storylines and Characters Have Enabled Long-Running Shows To Maintain Their Loyal Audiences For Years

- **America's Got Talent**: 12 years on air, maintained position in top 1% of all programs
- **Grey's Anatomy**: 13 years on air, maintained position in top 1% of all programs
- **NCIS**: 13 years on air, maintained position in top 1% of all programs
- **The Big Bang Theory**: 10 years on air, maintained position in top 1% of all programs
- **Criminal Minds**: 12 years on air, maintained position in top 1% of all programs
- **Modern Family**: 8 years on air, maintained position in top 2% of all programs
- **The Walking Dead**: 7 years on air, grew from top 8% to top 1% of all programs
- **Suits**: 7 years on air, maintained position in top 6% of all programs
- **Surveillant**: 6 years on air, grew from top 11% to top 6% of all programs

Reboots of beloved programs demonstrate that the connection viewers feel to their favorite shows can bridge years, even decades.

- Roseanne: After 20 years off air
- Dallas: After 21 years off air
- Will & Grace: After 11 years off air
- Dynasty: After 28 years off air
- MacGyver: After 24 years off air
- The X-Files: After 14 years off air
Long-Running Programming Continues to Be Celebrated By Fans And Lauded By Critics

3 of the 5 “Favorite TV Program” Nominees Have Been Running for 7+ Years

- The Walking Dead (after 13 years)
- The Big Bang Theory
- Grey’s Anatomy

“Favorite Network TV Drama”

“Favorite TV Crime Drama”

4 wins after 42 years on air

- Grey’s Anatomy

“Best Reality Competition” win after 7 years on air

- The Voice

Source: Completed seasons on air; 2017 Primetime Emmys
In Contrast, YouTube Channels And Personalities Often Do Not Have The Staying Power Of Many TV Programs/Stars
Where Are They Now?
A look at the top TV Shows and YouTube channels from 10 years ago illustrates that TV programs cultivate a larger, more passionate fan following.

Current Social Following Of the Top TV Programs and YouTube Channels from 2007

Top 5 TV Shows of 2007

- GREY'S ANATOMY
- American Idol
- HOUSE
- CSI - CRIME SCENE INVESTIGATION
- dancing with the stars

Top 5 YouTube Channels of 2007

- Smosh
- Lonelygirl15
- esemmdenters
- miaarose
- williamsledd

Source: "Social Following" includes Facebook Fans, Twitter Followers, YouTube Subscribers, and Instagram Followers; YouTube top 5 channels defined as most subscribers on YouTube per Tube Charts - 2nd Oct 2007, Smosh, Lonelygirl15, esemmdenters, miaarose, williamsledd; TV - Nielsen, Excludes Breakouts, Sports, Programs <5 min, and Specials, 9/24/06 - 5/21/07 - American Idol, Dancing with the Stars, CSI, Grey's Anatomy, House
The Indicators of Emotional Engagement: *Insatiable Appetite for More*

**“Pre”**
Urgency, anticipation, planning, & excitement for the content

- Nearly 60% of program tweets between airings are anticipation for next episode

**“During”**
Sustained interest & immediate need to share

- 88% of prime viewing is live
- 65% of Twitter trending topics related to ad-supported TV

**“Post”**
Compelled to seek out MORE content & engage with communities

- The top 5 TV programs have 13 million pieces of video on YT, 46% more than top 5 YT channels

**“Interest Over Time”**
Sustained relevance

- The top 5 TV programs from 10 years ago currently enjoy 2.5x the Facebook fans than YouTube channels of the same year
The Indicators of Emotional Engagement: 
People Actively Engaging with TV Content Before, During & After the Show

**Time Spent & Attention**
If viewed consecutively, the average American would devote 80 days - 20% of their year - to watching TV

**Insatiable Appetite for More**
Nearly 60% of program tweets are anticipation for the next episode

**Viewer Receptivity & Mindset**
People rely on TV for comfort, to unwind, to connect, to experience, to escape and to indulge

**Attachment to Characters**
Attachment to Characters

*Demonstrates the willingness of viewers to repeatedly open their lives and hearts to the characters they love - and love to hate!*
Leave me so I can cry over the deaths of fictional characters.
Why Do We Become Attached To Fictional Characters on TV?

Empathy enables a true emotional connection—even if the person is a fictional one—because we learned in real life how to feel the emotions, even if we haven’t been in the exact situation.

“We invest ourselves deeply in the experience of living with those characters. We tend to respond to them as though they were real individuals.”

- Howard Sklar, post doctoral researcher at University of Helsinki

“Once the viewer has a gut reaction it activates all sorts of feelings in them and it is hard to just see it as entertainment especially when it is a heart wrenching role.”

- Fran Greene, The Flirting Bible
Over Time, They Become A Part Of Our Lives And We Often Begin To Feel That They Are Real

109,296 signatures... Equivalent to the entire population of Cambridge, MA

Cigna Employs TV Doctors in New Campaign to Help Save Real Lives

Impact to Consumers: “Hundreds of thousands of people getting preventative care”

Impact to Cigna: Double-digit boost in its customer base getting checkups in markets where ads ran. 250% increase in positive brand sentiment in the first month of the campaign.
Taking On a Life Of Their Own, The Characters Themselves Often Spark Much Of The Program Discussion Online

A custom VAB study, #TVisSocial Episode 2, demonstrated that while trending topics are often about programs themselves, viewers also tweet about the character’s “I can’t believe what they just did!” moments.

57% of program tweets were for “Maya Pope” or “Olivia Pope”

50% of program tweets were for “Toya” or “Tamar”

30% of program tweets were for “Lucious”

100% of program tweets were for individuals - Alicia Fox, Big Show, Bray Wyatt Enzo, Goldust, Kurt Angle, Reigns, Samoa Joe, The Drifter

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (8:30p, 9:30p, 10:30p, 11:30p) during 4-week time period (5/15/2017 - 6/11/2017). Results include both “direct” and “related” TV topics.
Character-Driven Storylines Create An Emotional “Stakes” That Doesn’t Readily Exist On Many Digital Video Platforms

Top 2017 Video Content

And This Base Of Passionate Fans Has Catapulted Many TV Actors To Mass Box Office Success, Even Early On

The above 7 films grossed nearly $2 Billion in the US alone

Source: Box Office Mojo, U.S. gross only
In Contrast, Few YouTube Personalities Have Successfully Amassed A Large Following
Those YouTube Personalities That Have Jumped To Starring Roles On TV Largely Continue With Niche Audiences

Adam Conover, *Adam Ruins Everything*, TruTV
Billy Eichner, *Billy on the Street*, TruTV
Todrick Hall, *Todrick*, MTV
Ilana Glazer, Abbi Jacobson, *Broad City*, Comedy Central
Adam Devine, Anders Holm, Blake Anderson, *Workaholics*, Comedy Central
Hannah Hart, *I Hart Food*, Food Network
Jon Lajoie, *The League*, FXX
The Indicators of Emotional Engagement:
People Have an Almost Irrational Attachment to their Favorite TV Characters

**Time Spent & Attention**
If viewed consecutively, the average American would devote 80 days - 20% of their year - to watching TV

**Viewer Receptivity & Mindset**
People rely on TV for comfort, to unwind, to connect, to experience, to escape and to indulge

**Insatiable Appetite for More**
Nearly 60% of program tweets are anticipation for the next episode

**Attachment to Characters**
Character attachment drives consumers to create petitions to change storylines, to form active fan communities, to follow their favorite TV stars to the cinema - and even impacts how they seek medical treatment!
The Impact Of Emotional Attachment On Brands/Advertisers
Why Are Emotions Important? Because They Drive Intention & Build Brands

85% of consumer purchases are driven by Emotional Attachment

“Emotion leads to action, while reason leads to conclusions.”
- Neurologist, Donald B. Calne

Someone who is highly attached is 3x more likely to engage with the brand. They are less price sensitive, go deeper into the product line and have a higher lifetime value to an advertiser.

Source: LEAP Media Investments
TV Creates An Environment Where Brands Can Thrive And Make A Personal Connection With Viewers

“In which places are you most likely to find advertising that...” (% agree)

- TV:
  - Sticks in your memory: 64%
  - Makes you laugh: 62%
  - You like: 54%
  - Makes you feel emotional: 58%

- Next Best Competitor(s):
  - Social Media, Radio, & Newspapers: 10%
  - YouTube: 17%
  - Social Media: 13%
  - Social Media & YouTube: 9%

Source: TV/Ad Nation, 2016, Ipsos Connect/Thinkbox, adults 15+
Which In Turn Delivers Stronger Ad Recall

Ad Recall

62% 47% 45% 46%

% of viewers able to identify half or more advertisers after viewing content

Source: CRE and Hub Research custom study. "New study finds that TV outperforms Digital platforms in viewer ad attention & recall" 6/26/16
And Fosters Brand Health

“In which places are you most likely to find advertising that...”

- 66% of respondents say TV makes brands famous, compared to 12% for the next best competitor (Social Media).
- 55% say TV draws your attention to brands/products, compared to 13% for the next best competitor (Social Media).

Source: TV/Ad Nation, 2016, Ipsos Connect/Thinkbox, adults 15+
Ultimately Driving Greater Brand Equity Lifts Than Digital Media

% Lift Driven by TV Only & Digital Only

<table>
<thead>
<tr>
<th></th>
<th>Brand Familiarity</th>
<th>Brand Opinion</th>
<th>Brand Recommendation</th>
<th>Brand Association</th>
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<td><strong>Digital only</strong></td>
<td>7%</td>
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</tbody>
</table>

Source: IAB/Research Now Cross Media Effectiveness Study, January 2017; Digital Only = Desktop + Mobile Web
Marketers Know This And Rely Upon TV As a Platform To Showcase Their Most Emotionally Compelling Ads

Examples from Budweiser and Always demonstrate the ability of the television environment to drive momentum for their emotion-based campaigns.

Reported TV Ad Spend

- Budweiser: $80.2MM
- Always: $8.8MM

TV-driven Social Actions

- Budweiser: 32.8MM
- Always: 9.2MM

Source: Nielsen AdIntel; Budweiser - expenditure against all Clydesdale executions, 2013-Sept 2017; Always “Like a Girl” campaign, 2015-Oct 2016; Social Actions sourced from iSpot.
“Environment” Has Grown Increasingly Important As Ad Placement Next To Objectionable Online Content Continues To Be a Concern

Consumer reaction to online advertising adjacent to objectionable content...

...20% will boycott, be vocal, or raise issues about it
...37% say it will change how they think of the brand when making a decision to buy
...48% of consumers will abandon brands they love if their ads run alongside offensive online content

Source: CMO Council, “How Brands Annoy Fans” June 2017
And So Why Are Emotions Important? Because They Drive Intention & Build Brands

- 85% of purchases are drive by emotion
- 58% of consumers believe TV is where they will find ads that elicits emotion
- 64% of consumers believe TV is where they will find ads that are memorable

Source: Leap Media Investments, TV/Ad Nation Ipsos Connect/Thinkbox, 2016
Indicators Of Emotional Engagement: A Summary

**Time Spent & Attention**
Time is our most precious resource. Focusing our attention on something signals commitment, loyalty, and interest.

If viewed consecutively, the average American would devote 80 days - 20% of their year - to watching TV.

**Insatiable Appetite for More**
More anticipation, more conversation, more spoilers, more episodes, more related content.

Nearly 60% of program tweets are anticipation for the next episode.

**Viewer Receptivity & Mindset**
People go to the devices & platforms with an established expectation for their experience.

People rely on TV for comfort, to unwind, to connect, to experience, to escape and to indulge.

**Attachment to Characters**
The willingness of viewers to repeatedly open their homes and hearts to the characters they love - and love to hate!

Character attachment drives consumers to create petitions to change storylines, to form active fan communities, to see their favorite TV stars in movies - and even impacts how they seek medical treatment!

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**Why does emotional engagement matter?**

- 85% of consumer purchases are driven by emotional attachment.
- 58% of consumers believe TV is where they are most likely to find advertising that makes them feel emotional (6x greater than Social media).
- 64% of consumers believe TV is where they will find ads that are memorable (6x greater than Social media).
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