Analysis of Primary TV Watching Habits

Comparing Streaming Viewers to Live and On Demand Viewers Using CivicScience's DeepProfile™

May 2014 Insight Report
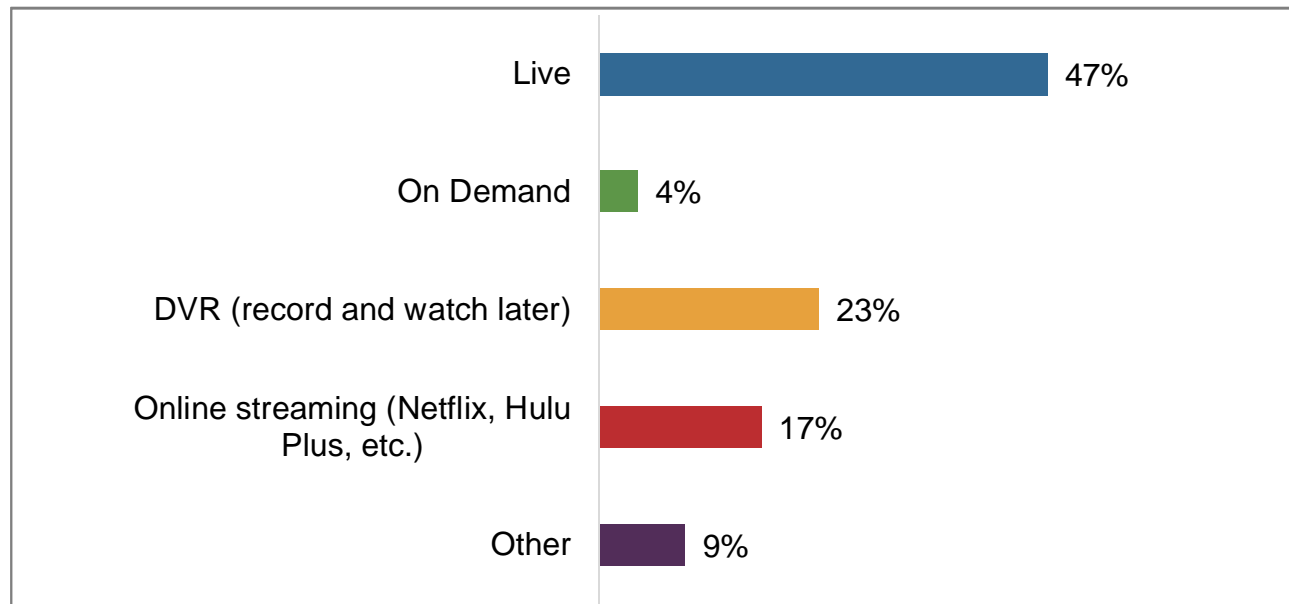
CivicScience DeepProfileï Project Goal

To find meaningful insights by comparing people who primarily watch **live TV**, those who watch shows via **On Demand or DVR**, those who **stream TV** shows via the Internet, and the **general U.S. population**.

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Topline Results

What is the primary way you watch TV?

Category	Percentage
Live	47%
On Demand	4%
DVR (record and watch later)	23%
Online streaming (Netflix, Hulu Plus, etc.)	17%
Other	9%

˝ **9,059 total responses** from 4/11/14 to 5/1/14, weighted according to U.S. Census figures for gender and age, 13 and older.

˝ 27% of the population watches the majority of their TV via On Demand or by DVR.

˝ 17% of people use an online streaming service.

˝ Note: We did not analyze "Other" respondents for the purposes of this report.

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Summary of Findings

˝ **Online streaming viewers** are more likely to be younger in age (under 25), have lower incomes (under $50K), live in urban areas, don't own a home or have children, favor sitcoms, use Pinterest, and rank very high in indexes for discriminating shoppers, market mavens, and social media use. Higher incomes (over $100K) see slightly more streaming viewers than those making $75K-$100K. Females use online streaming slightly more than males. Brands they like include Trader Joe's, Netflix, Sam's Club, and Long John Silver's.

˝ **On demand/DVR viewers** are more likely to be aged 25-44, live in the suburbs, are parents, own a home, make between $25K-$150K, prefer dramas and music programs, use Facebook, get fashion inspiration from TV and movies, and tell others about favorite products. Brands they like include Olive Garden, Five Guys Burgers and Fries, Panera Bread, and Hanes.

˝ **Live TV viewers** are still the largest group. They tend to be older in age, are parents & grandparents, favor news programming, are more rural, earn under $75K in annual household income, are more influenced by ads on TV, and index well below other viewers and the general U.S. population as discriminating shoppers, market mavens, and social media users. Brands they like include Cracker Barrel, Arby's, and Carhartt.
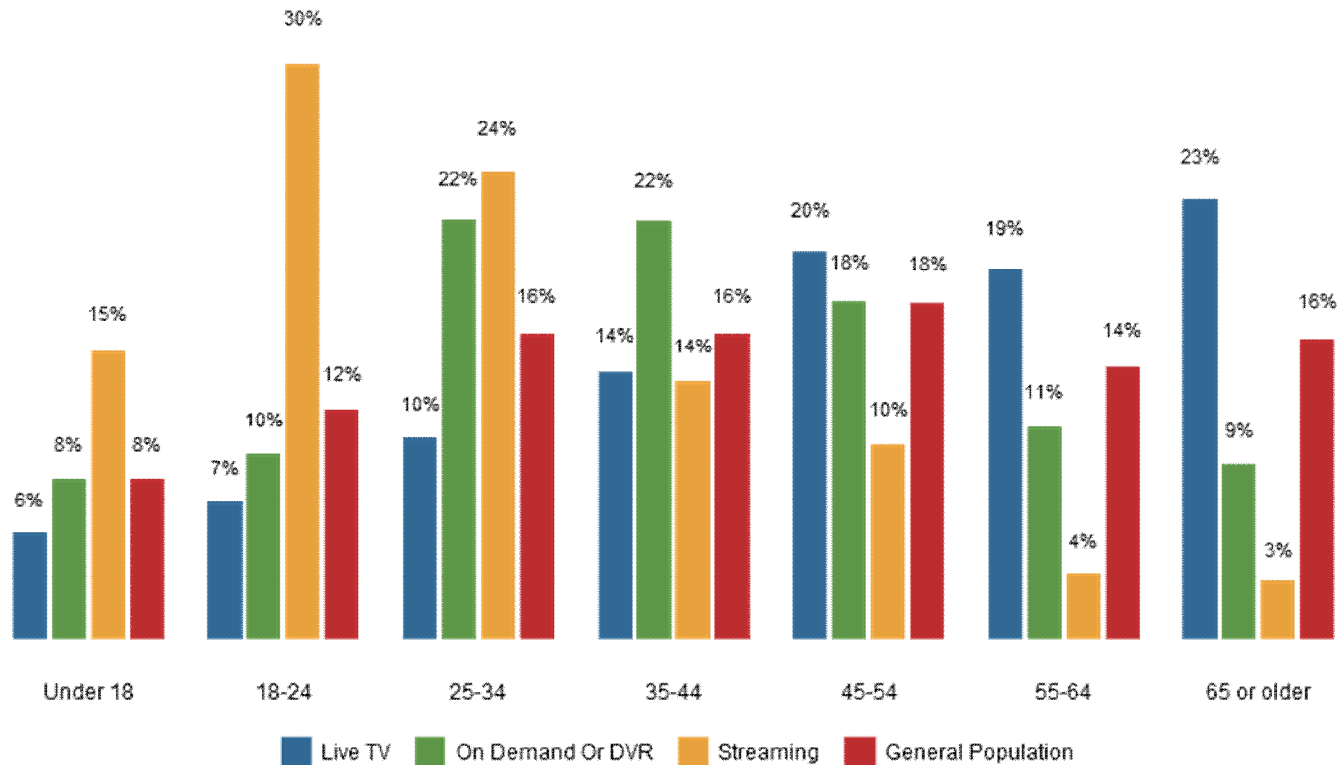
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# Demographics

Please indicate your gender
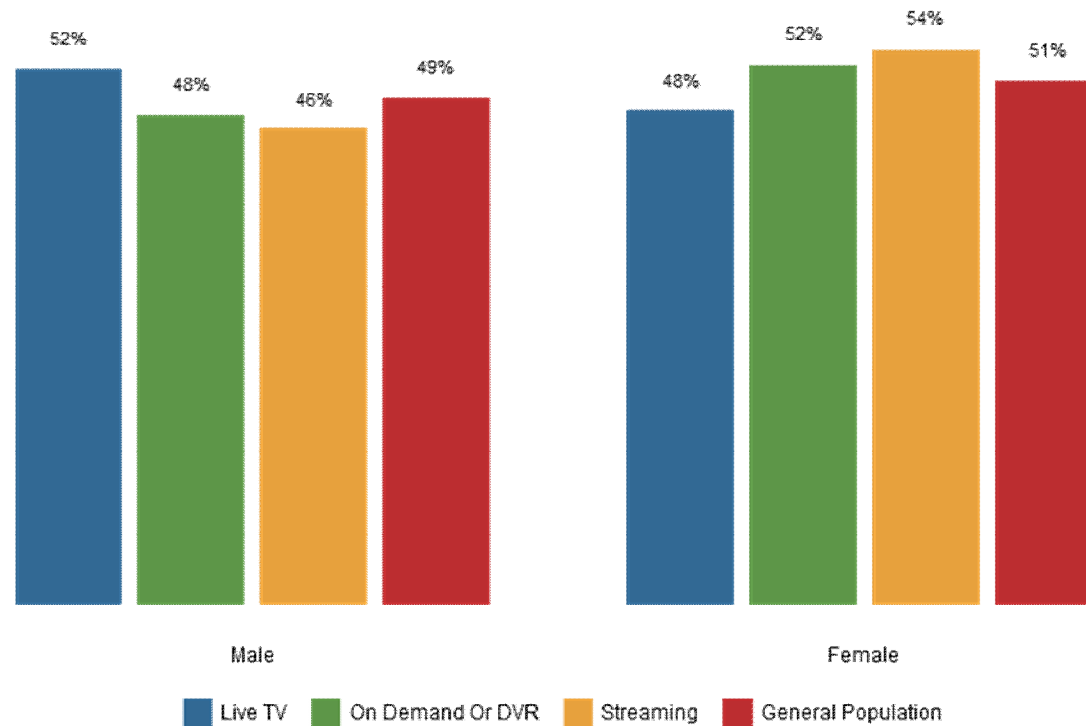
Women are somewhat more likely than men to watch TV programming on demand/DVR or via online streaming vs. live.

To what broad age group do you belong?

Younger viewers significantly favor online streaming. On demand/DVR viewing peaks (at 22%) among 25-44 year olds. Live TV is watched more by older age groups.

# What is your expected annual household income before taxes?
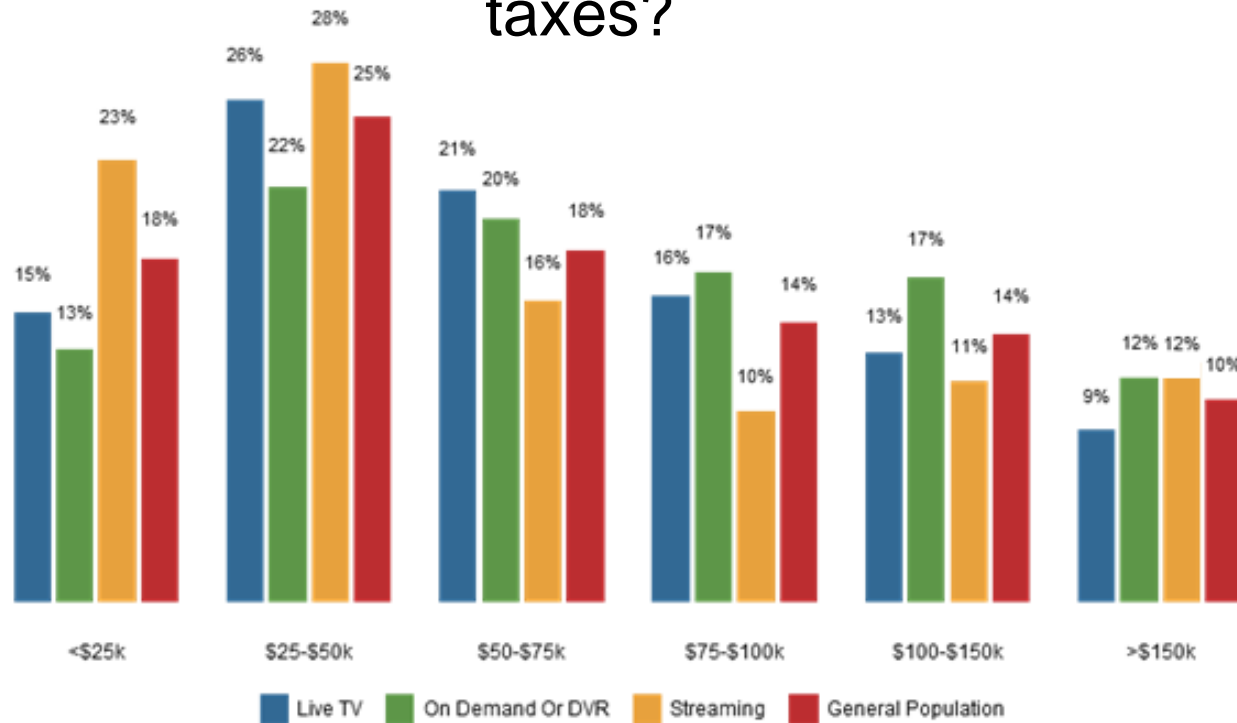
Online streaming is preferred among those making lower incomes (<$50K per year), which correlates strongly with age. However, it also starts to climb among higher-income households (>$100K). On Demand/DVR viewers are more likely than other groups to have a HHI of $75K-$150K.

# What is the highest level of education you have attained?
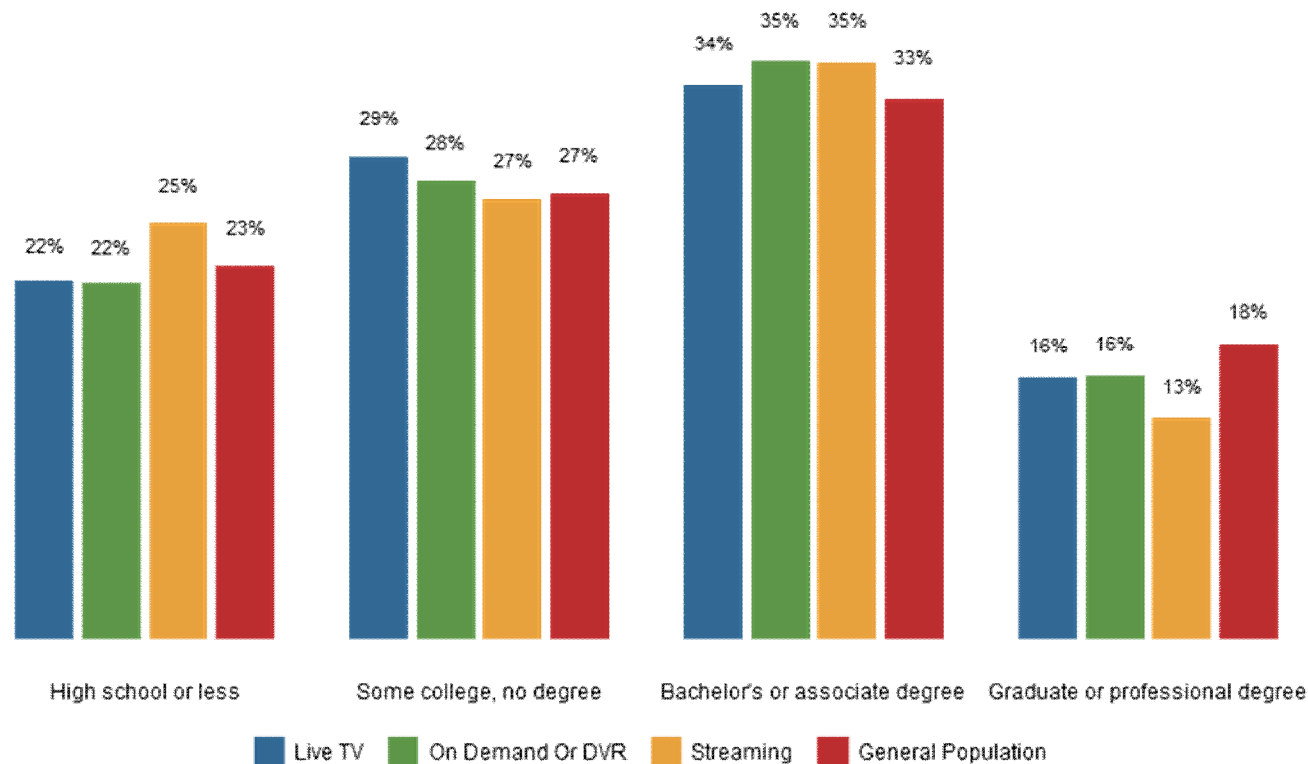
Education doesn't substantially affect TV viewership habits, other than the age proxy seen among those having a high school-level education or less also showing a stronger preference for online streaming.

What is your parental status?
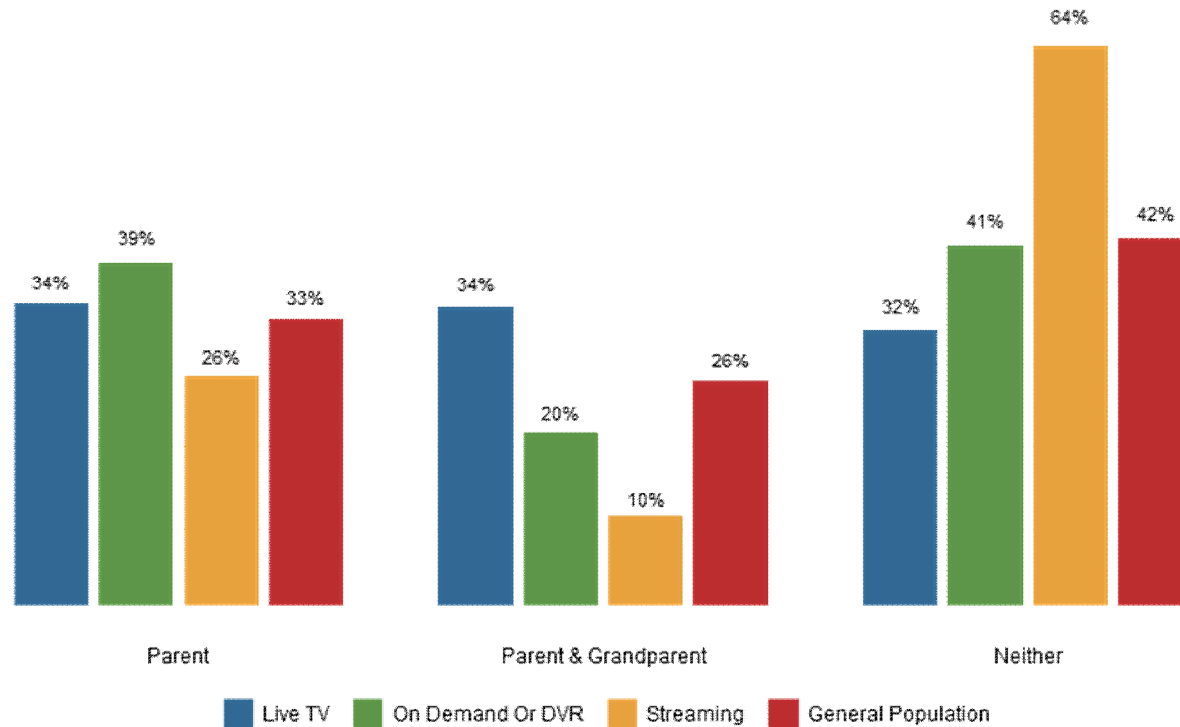
Here also we see the age proxies for TV viewing preferences. People who primarily stream TV online are more likely to be neither parents or grandparents. On Demand or DVR users are more likely to be parents, while live TV watchers are more likely to be both a parents and grandparent.

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What best describes your current residential status?
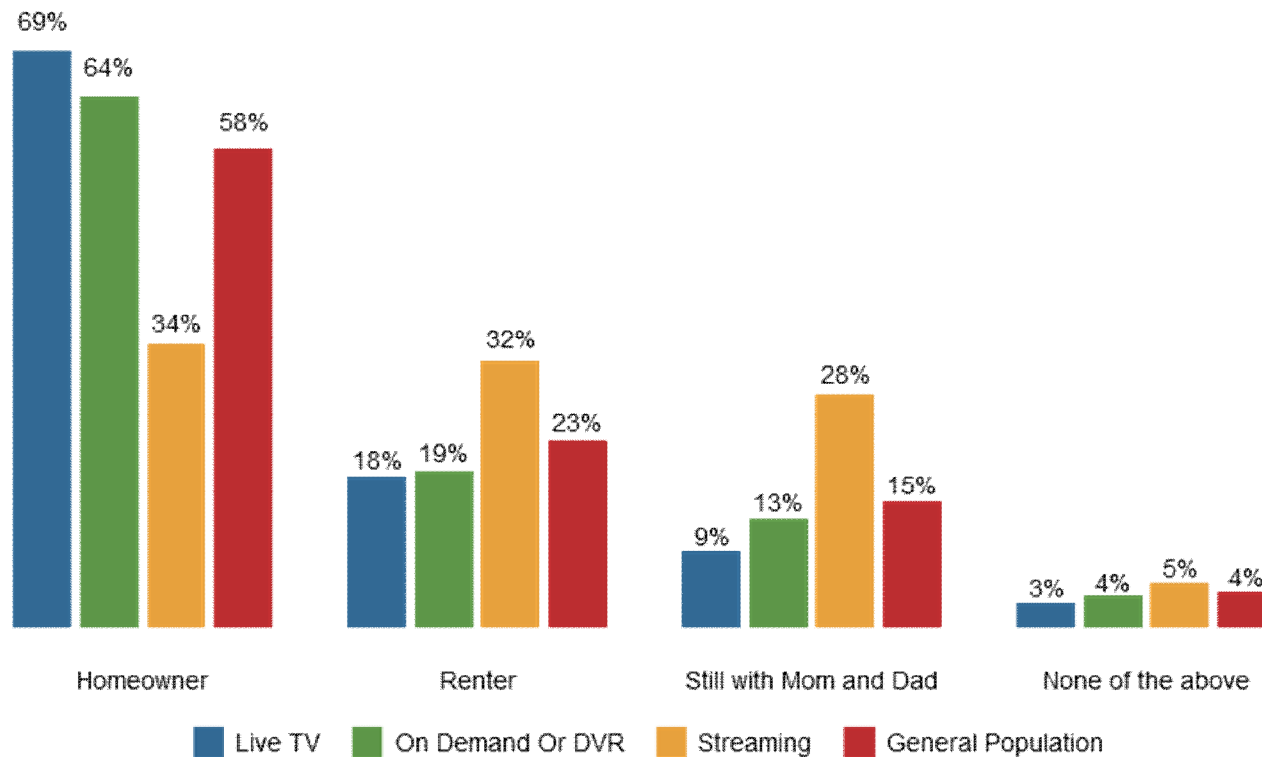
Another area where age is a factor, those who prefer online streaming of TV programs are more likely to rent or still live with their parents.

What type of area do you live in?
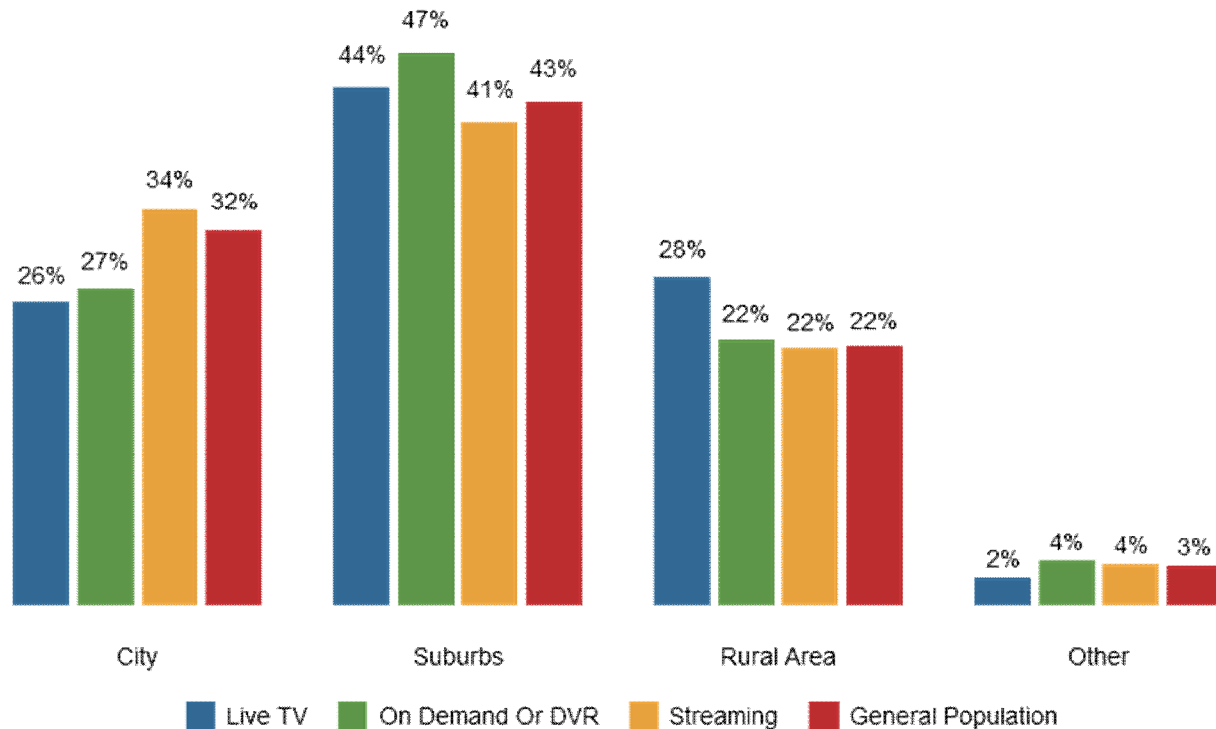
Streamers are more likely than the other groups to be urban dwellers. Those who use On Demand or DVR most are more likely to live in the suburbs. Live TV viewers are more likely than other groups to live in a rural area.

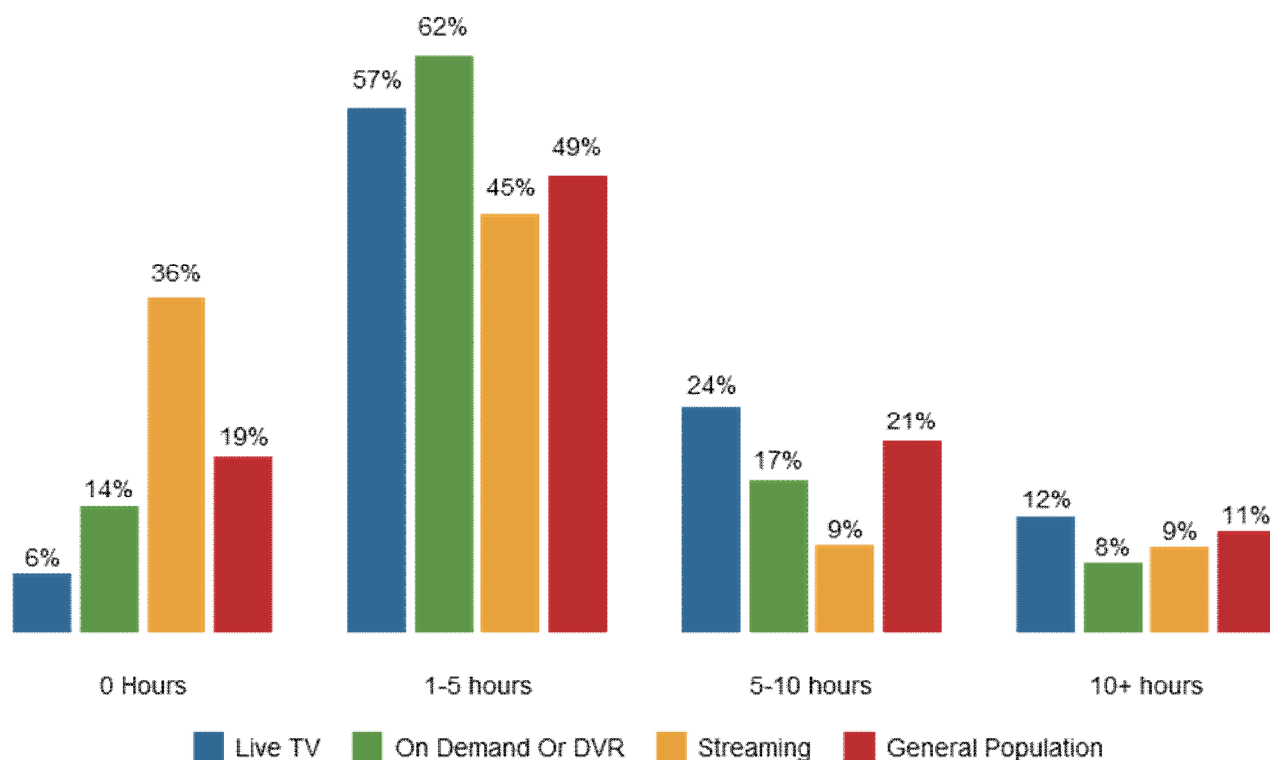# Additional Insights

How much would you say you watch news programming on TV in an average week?

Live TV viewers are more likely to watch more news programming. Those who prefer online streaming are significantly more likely to not watch any news programming.
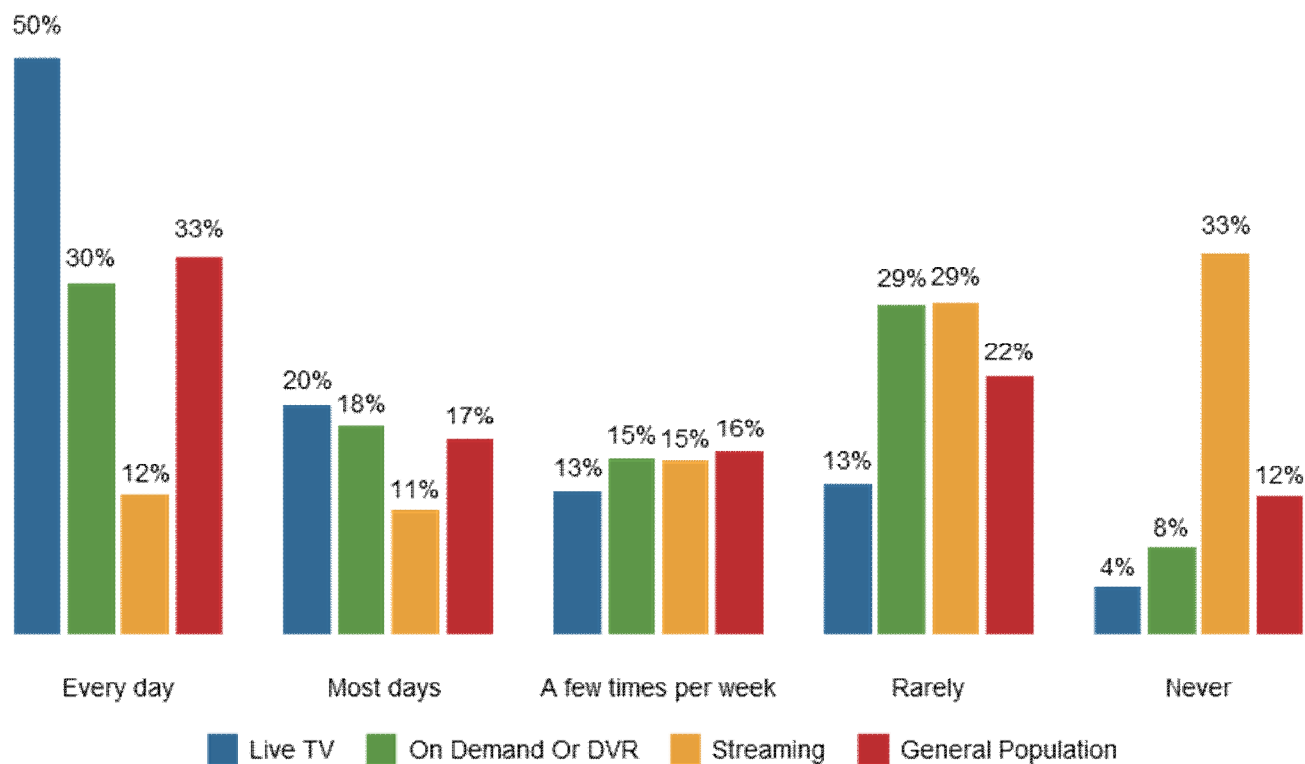
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Of the following, where do you MOST get your fashion inspiration?
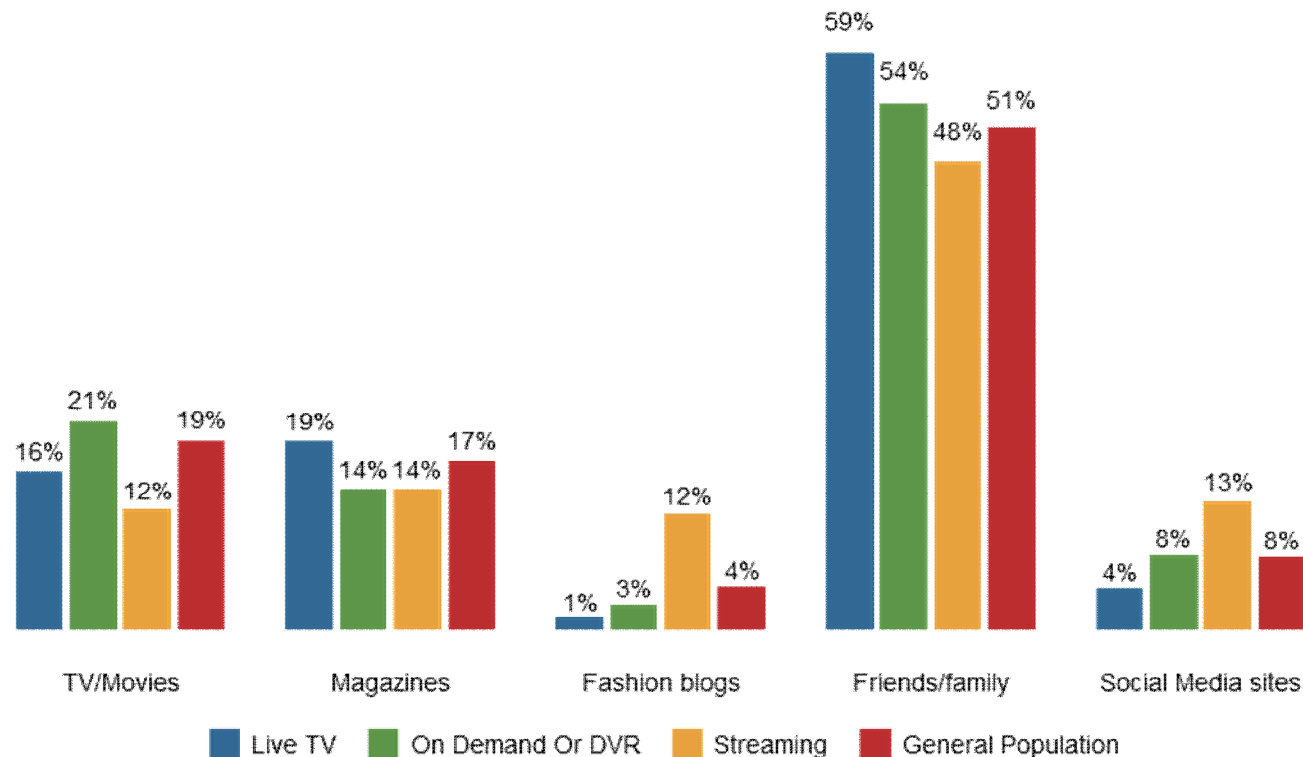
Those who prefer to watch TV On Demand or from DVR are more likely to get fashion inspiration from TV and movies. Online streaming viewers pay more attention to fashion blogs and social media sites.

Brand Indices

The data below shows which brands and celebrities the different viewer types over-index (likeability) when compared to the general U.S. population.

Live TV	On Demand/DVR	Streaming
Bob Evans	Bob Evans	Long John Silver's
Cracker Barrel	Texas Roadhouse	Red Lobster
Arby's	Houlihan's	Trader Joe's
Lone Star Steakhouse	Panera Bread	Sam's Club
Carhartt	Olive Garden	Bank of America
L.L. Bean	Five Guys Burgers and Fries	L.L. Bean
Rockport	Rockport	Netflix
Keith Urban	Hanes	Adam Levine
Jay Leno	Helen Mirren	Stephen Colbert
Robert Redford	Matthew McConaughey	Harrison Ford

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CivicScience DeepProfile™ Indices

DeepProfile™ Indices

In the following slides, we examine how those who primarily watch live TV, those who watch shows via On Demand or DVR, those who stream TV shows and the general U.S. population responded to a number of questions that contribute to the DeepProfleï   indices CivicScience developed. In this report, we look at 5 indices . **Discriminating Shopper, Market Maven, Social Media, Tech Savvy,** and **TV Viewing** . in order to **highlight how these population segments compare**.
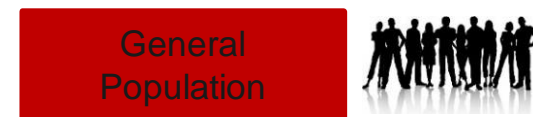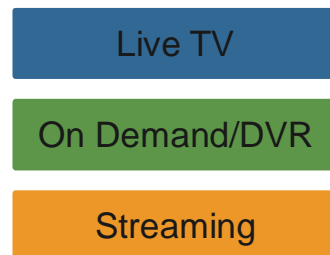
Live TV
On Demand/DVR
Streaming

General Population

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Discriminating Shopper

˝ The Discriminating Shopper index aims to identify the extent to which population segments do research before making purchases, and how easy or difficult they will be to win over.

˝ Streaming TV viewers rank highest and above the general population, with live TV viewers significantly lower.

Aggregate

Streaming – 110
General Population – 100
On Demand/DVR – 91
Live TV – 78

Individual Attributes Visualization
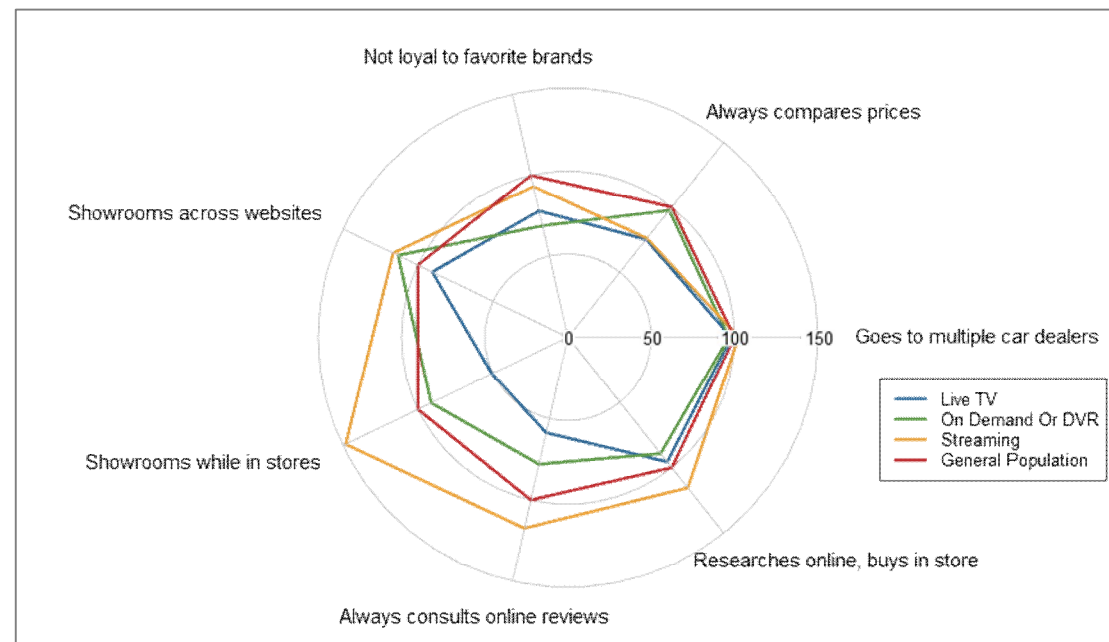
Discriminating Shopper (continued)

Individual Attributes

Attribute	Live TV	On Demand/DVR	Streaming
Goes to multiple car dealers	40%	39%	**42%**
Always compares prices	36%	**47%**	37%
Not loyal to favorite brands	10%	9%	**12%**
Showrooms across websites	63%	79%	**81%**
Showrooms while in stores	8%	14%	**23%**
Always consults online reviews	16%	21%	**31%**
Researches online, buys in store	72%	67%	**87%**
Goes to multiple car dealers	40%	39%	**42%**

- ˝ Those who prefer watching TV via online streaming rank highest in all Discriminating Shopper index categories, except for price comparison, which ranks highest among On Demand/DVR viewers.
- ˝ Streaming viewers rank most notably higher in showrooming while in stores, and also for doing research online before buying in stores.

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Market Maven

˝ The Market Maven index aims to identify the extent to which population segments adopt new products and brands, and share their opinions with others.

˝ Streaming TV viewers are also highest-ranking market mavens, but On Demand/DVR viewers also rank higher than the general population.
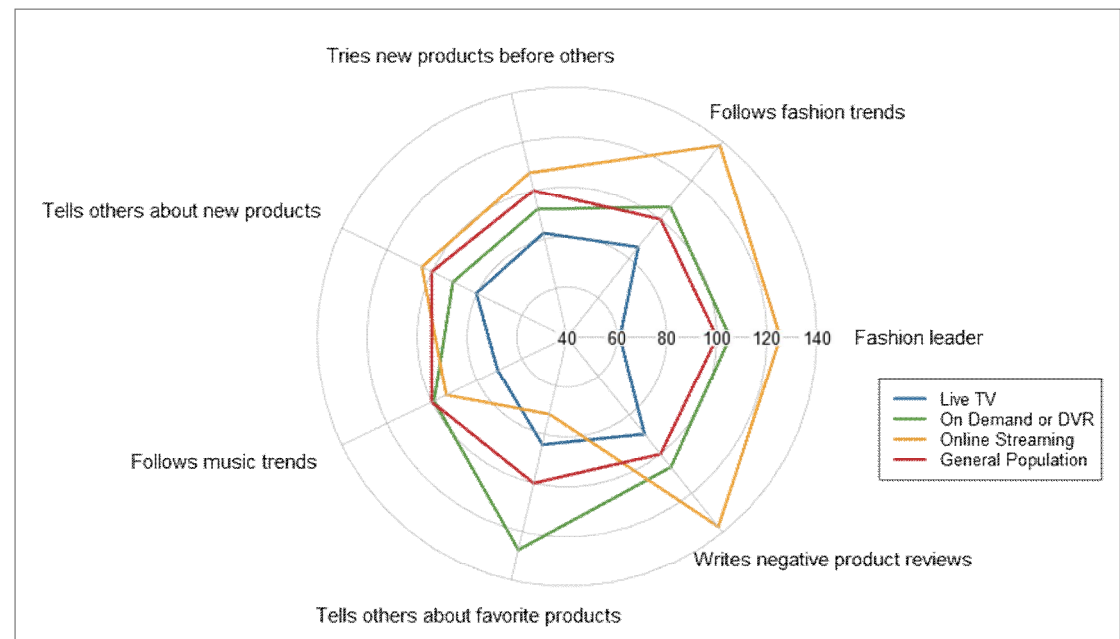
Aggregate

Streaming – **111**
On Demand/DVR – **104**
General Population – **100**
Live TV – **79**

Individual Attributes Visualization

Market Maven (continued)

Individual Attributes

Attribute	Live TV	On Demand/DVR	Streaming
Fashion leader	8%	14%	**17%**
Follows fashion trends	33%	40%	**53%**
Tries new products before others	22%	25%	**29%**
Tells others about new products	40%	45%	**52%**
Tells others about favorite products	46%	**69%**	39%
Follows music trends	29%	**40%**	38%
Writes negative product reviews	40%	48%	**62%**

˝ Streaming TV viewers were more likely to see themselves as a fashion leader, to follow fashion trends, to try new products and tell others about new products. They were significantly more likely to see they write negative product reviews.

˝ On Demand/DVR viewers are significantly more likely than other viewers to tell others about their *favorite* products, and also more likely to follow music trends.

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Social Media

˝ The Social Media index aims to identify which social media platforms population segments use, and the extent to which they influence their preferences and behavior.

˝ Streaming TV viewers are the only group to rank above the general population in our social media index, and by a significant margin.

Aggregate

Streaming – 129
General Population – 100
On Demand/DVR – 87
Live TV – 59

Individual Attributes Visualization

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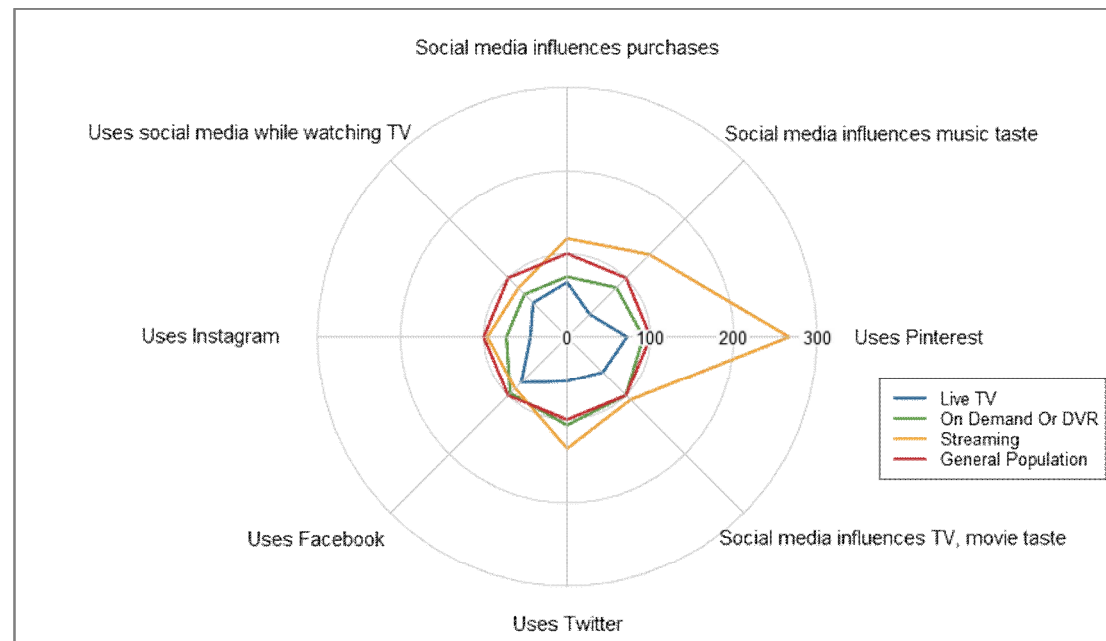
Social Media (continued)

Individual Attributes

Attribute	Live TV	On Demand/DVR	Streaming
Uses Twitter	13%	25%	**32%**
Uses Facebook	50%	**63%**	57%
Uses Instagram	5%	9%	**11%**
Uses Pinterest	9%	12%	**34%**
Social media influences music taste	11%	24%	**39%**
Social media influences purchases	24%	26%	**42%**
Uses social media while watching TV	11%	14%	**16%**
Social media influences TV, movie taste	22%	36%	**39%**

˝ Streaming TV viewers rank highest across the board, except for Facebook use, which was highest among On Demand/DVR viewers.

˝ Notable areas where streaming viewers ranked much higher than other TV viewer types were in the use of Pinterest and saying that social media influences purchases they make.

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Tech Savvy

˝ The Tech Savvy index aims to identify the extent to which population segments use their digital devices and are informed and aware of the latest technology available.

˝ Steaming TV viewers are most likely to be very tech savvy, but On Demand/DVR viewers also edge slightly above the general population for this index.

Aggregate

Streaming – 135
On Demand/DVR – 104
General Population – 100
Live TV – 68

Individual Attributes Visualization
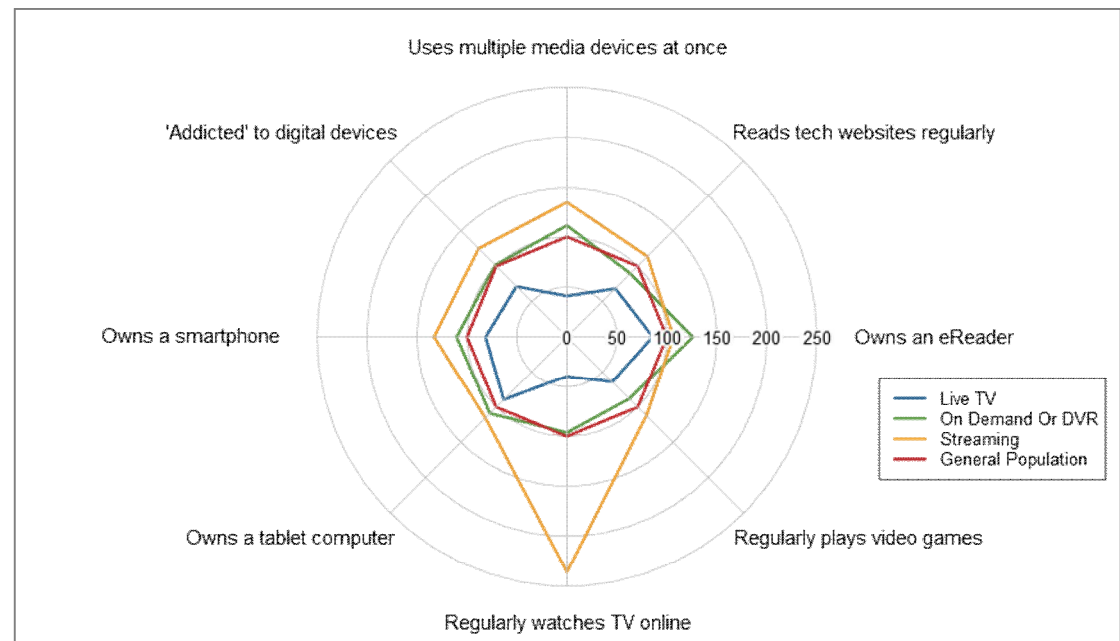
Tech Savvy (continued)

Individual Attributes

Attribute	Live TV	On Demand/DVR	Streaming
Owns an eReader	24%	**35%**	29%
Reads tech websites regularly	25%	33%	**41%**
Uses multiple media devices at once	14%	38%	**46%**
'Addicted' to digital devices	38%	53%	**66%**
Owns a smartphone	45%	62%	**74%**
Owns a tablet computer	35%	42%	**45%**
Regularly watches TV online	12%	29%	**70%**
Regularly plays video games	17%	24%	**30%**

˝ Here again, the younger age of the streaming TV viewer shows they are more tech savvy in nearly all categories, except for eReader ownership, which is higher among the more suburban On Demand/DVR viewers.

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TV Viewing

˝ The TV Viewing index aims to identify the extent to which population segments watch various genres of TV and are influenced by what they see on TV.

˝ It gets interesting here. On Demand/DVR viewers rank the highest, which happens to be the same as the general population, barely edging out Live TV viewers. Streaming viewers rank much lower in preferring various TV genres.

Aggregate

On Demand/DVR – **100**
General Population – **100**
Live TV – **99**
Streaming – **72**

Individual Attributes Visualization
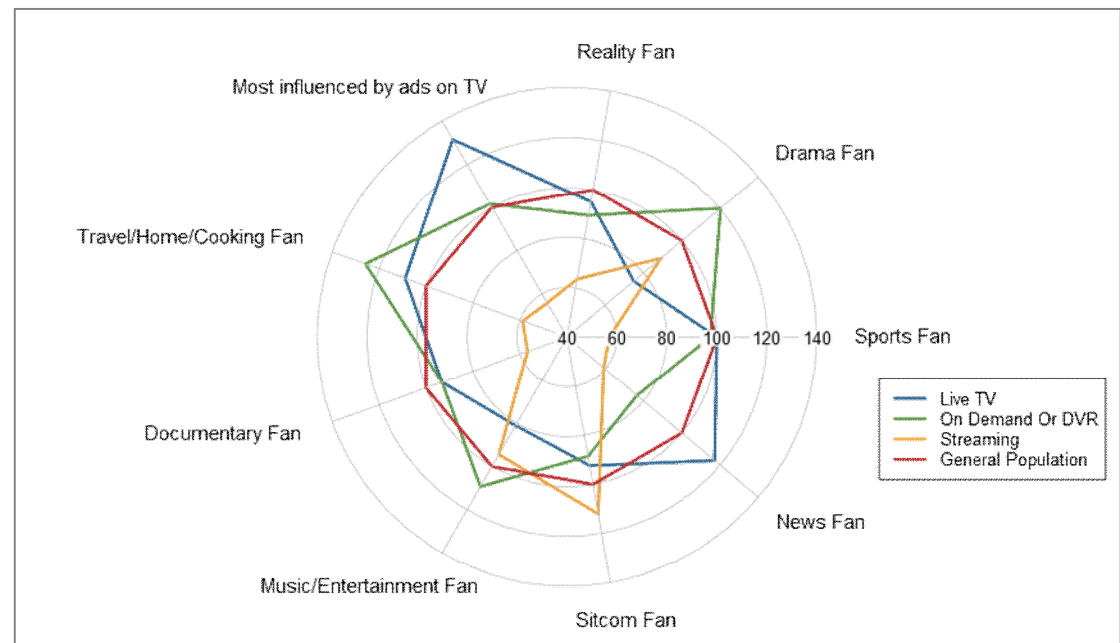
TV Viewing (continued)

Individual Attributes

Attribute	Live TV	On Demand/DVR	Streaming
Sports Fan	**22%**	**22%**	13%
Drama Fan	14%	**22%**	16%
Reality Fan	**15%**	14%	10%
Travel/Home/Cooking Fan	14%	**16%**	7%
Documentary Fan	**8%**	**8%**	5%
Music/Entertainment Fan	24%	**32%**	28%
Sitcom Fan	15%	14%	**18%**
News Fan	**37%**	24%	19%
Most influenced by ads on TV	**66%**	51%	28%

˝ On Demand/DVR viewers are more likely than other types of viewers to prefer dramas, travel/home/cooking lifestyle shows, music/entertainment programs, and documentaries (although documentaries rank lowest among all viewer types).

˝ Live TV viewers are more likely than others to prefer reality TV and news programs, and much more likely to say they are influenced by ads on TV.

˝ Steaming viewers are more likely than others to prefer sitcoms.

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DeepProfileï Indices Summary

Index	Live TV	On Demand or DVR	Streaming	
Discriminating Shopper	78	91	**110**	
Market Maven	79	104	**111**	
Social Media	59	87	**129**	
Tech Savvy	68	104	**135**	
TV Viewing	99	**100**	72	
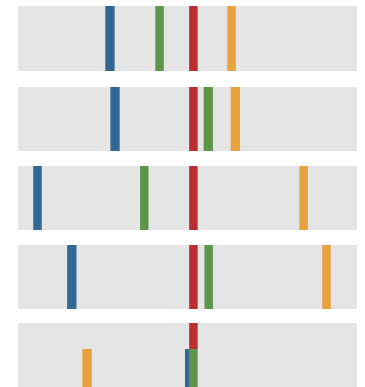
Among the 5 of the 12 CivicScience DeepProfileï indexes highlighted in this report, the younger, more urban Steaming TV viewers rank notably higher than the other viewer types . except in the TV Viewing index, which measures genre fans and influence of TV ads.

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Appendix Slides

The CivicScience DeepProfile™ Indices

❑ **Charitable Giving**- The Charitable Giving index aims to identify the extent to which population segments donate to different charity groups, and how much time they spend volunteering.

❑ **Discriminating Shopper**- The Discriminating Shopper index aims to identify the extent to which population segments do research before making purchases, and how easy or difficult they will be to win over.

❑ **Environmental Consciousness**- The Environmental Consciousness index aims to identify the extent to which population segments alter their lifestyle for the environment and shows overall concern about environmental issues.

❑ **Health & Wellness**- The Health & Wellness index aims to identify the extent to which population segments monitor and maintain their health and wellbeing.

❑ **Market Maven**- The Market Maven index aims to identify the extent to which population segments adopt new products and brands, and share their opinions with others.

❑ **Money Manager** – The Money Manager index aims to identify the extent to which population segments manage their personal finances including retail, online, and mobile banking practices; retirement and savings; and keeping up with financial news.

❑ **Political Engagement**- The Political Engagement index aims to identify the extent to which population segments are involved in all levels of politics.

❑ **Price Sensitivity**- The Price Sensitivity index aims to identify the extent to which population segments are price-conscious when shopping, both as a whole and across specific categories.

❑ **Social Media**- The Social Media index aims to identify which social media platforms population segments use, and the extent to which they influence their preferences and behavior.

❑ **Sports Fan**- The Sports Fan index aims to identify the extent to which population segments are interested in different types of sports.

❑ **Tech Savvy**- The Tech Savvy index aims to identify the extent to which population segments use their digital devices and are informed and aware of the latest technology available.

❑ **TV Viewing**- The TV Viewing index aims to identify the extent to which population segments watch various genres of TV and are influenced by what they see on TV.

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CivicScience DeepProfile™ - How it Works

For the segments we're interested in, we look at how those people responded to **thousands of other questions** in our database, building a contingency table for each pair of questions.

We automatically mine thousands of questions related to our 12 DeepProfile™ indices, plus demographic and behavioral attributes such as:

- ˝ **Lifestyle**
- ˝ **Media consumption**
- ˝ **Entertainment**
- ˝ **Technology usage**
- ˝ **Health and wellness**
- ˝ **Politics and ideology**
- ˝ **Other general attributes**

We calculate each table's **Pearson's chi-squared** statistic, and then employ the **Benjamini-Hochberg false detection rate** procedure to screen out likely false positives (i.e., statistically-significant associations that may be due to random chance).

The tables that pass through our screening process are then ranked by their **Tschuprow's T coefficient**, which measures strength of association.

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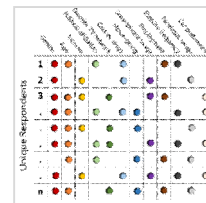
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The leading intelligent polling and **real-time consumer insights** platform. Runs on the largest **proprietary**, syndicated, and independent consumer survey database. Supports a variety of consumer research solutions, including our DeepProfile™.

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