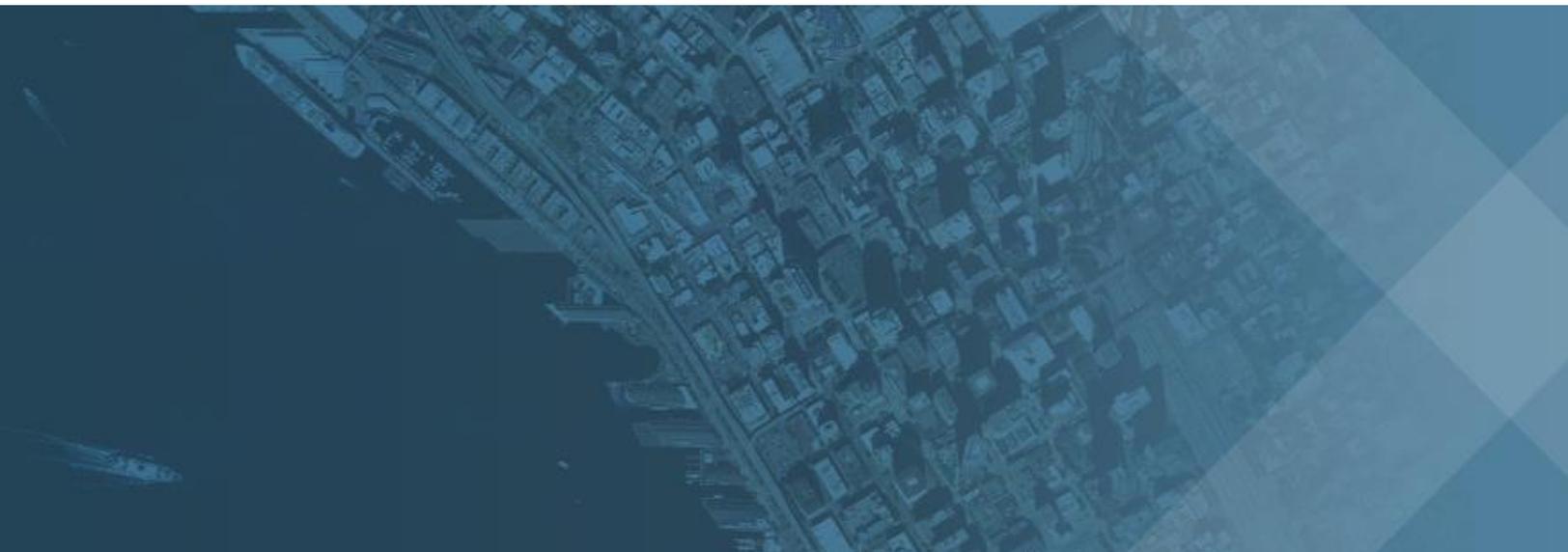




Ratings to Retail – Fall TV 2013

The Relationship between TV and In-Store Visitation

September 2013



Website: <http://www.placed.com>

Contact: info@placed.com

Overview

The Fall TV schedule is a critical time for the entertainment and advertising industries. New series aim to gain traction as returning series jockey for ratings. As much a part of the Fall TV season as the shows are the ads. eMarketer reports that total TV advertising will account for \$66.4 billion in 2013, with the Fall TV season widely considered the most crucial period.

With billions of dollars spent to reach viewers and influence their behavior, knowing what people watch is as important as understanding what consumers do when the episode isn't airing. *Ratings to Retail – Fall TV 2013* analyzes device, network and show-level insights into how Americans' TV viewing habits correlate to offline store visitation.

Ratings to Retail – Fall TV 2013 sources its data from [Placed Insights](#), the first ratings service for the physical world. Leveraging the world's largest location panel, Placed Insights measures over 100 million locations a day across more than 100,000 U.S. panelists who have opted-in to share their location, creating the most comprehensive view into consumers' behaviors.

This report layers in [Placed Questions](#), a feature within Placed Insights, which combines mobile survey questions with the direct measurement of consumers' location activities. *Ratings to Retail – Fall TV 2013* is based on a subset of 10,489 U.S. smartphone survey respondents. These panelists were surveyed in August 2013 to provide detailed insight into consumers' TV viewing habits and shopping behaviors. Learn more about Placed's [methodology](#).

Below are the definitions of the metrics used in the report:

- **Index:** *Tendency a consumer segment is more or less likely to frequent a destination when compared to the U.S. average. Average representation = 100.*

Table of Contents

Device Insights	3
Network Insights	4
TV Series Insights.....	6

Device Insights

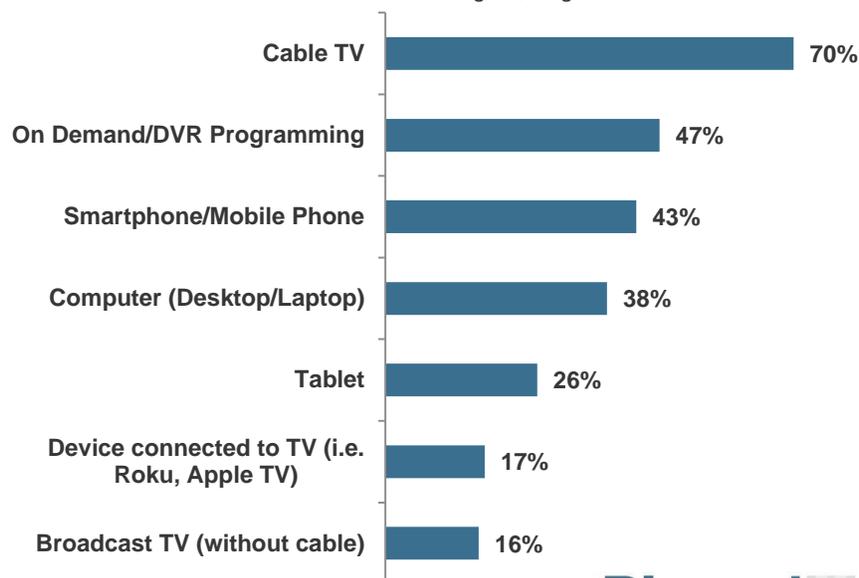
Smartphone Owners Opt to Watch TV on Phone Over Computer or Tablet

Using Placed Questions, the study asked smartphone panelists how they watch TV across various platforms. Although the majority of respondents watch programming via Cable TV (70%), digital devices, such as smartphones, tablets and computers, accounted for a significant share of TV viewing.

- Among respondents, 43% watch TV programming on their smartphone/mobile phone, topping computer (38%) and tablet (26%) viewing.
- People that watch TV shows on digital devices (i.e. smartphones, tablets, computers) showed a high likelihood to visit electronics retailers. These viewers were 9% more likely to visit Best Buy and the Apple Store than an average U.S. consumer, with both stores indexing at 109. Of the major wireless providers, T-Mobile stores displayed the highest skew (index 109) for visitation by this audience, followed closely by Sprint stores (108).
- Respondents who watch TV via smartphone/computer/tablet displayed preferences to visit certain retailers including Sports Authority (index 114), Macy's (110), and Gap (109), indicating advertising potential for these brands across digital platforms.

Q: What device(s) do you use to watch TV shows?

Source: Placed Insights, August 2013



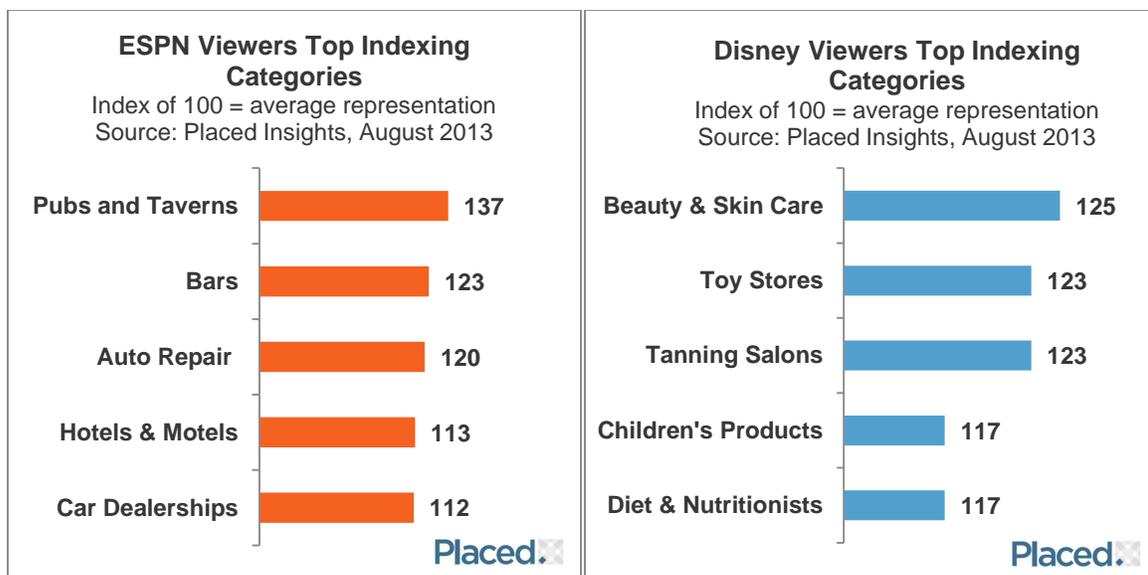
Placed.

Network Insights

FOX Viewers: Most Likely to Visit Movie Theaters

Placed asked panelists which networks they planned to watch this Fall and directly measured the business categories and businesses they visited in the physical world. By connecting network preference to store visits, Placed provides insight into the connection between TV advertising and offline behaviors.

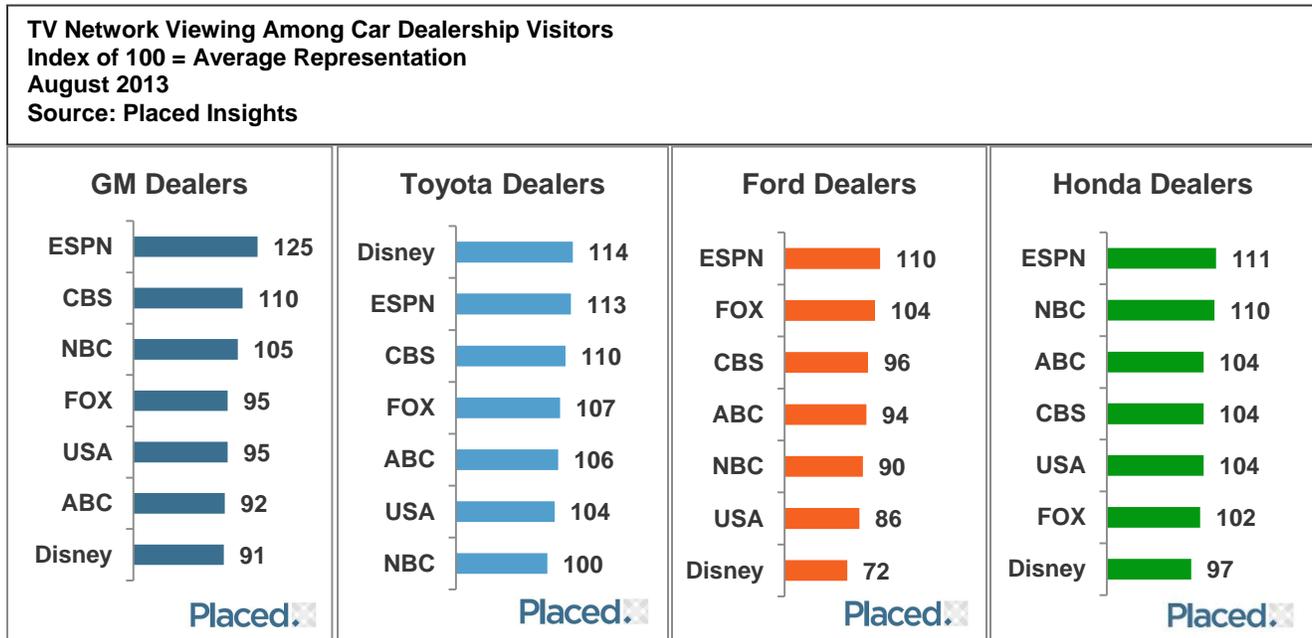
- According to [Ad Age](#), movie studios spend about 70% of their budget on TV advertising for an average wide release. Placed found that viewers of all major TV networks were more likely to visit Movie Theaters than an average consumer, with FOX leading the major networks as its viewers were 10% more likely to visit a movie theater than the U.S. population. ABC viewers saw the second highest index (108), followed by CBS (106), and NBC (103).
- ESPN's audience behavior differed from other networks with bar-related categories over indexing, aligning with the network's core audience.
- Top indexing categories for Disney viewers also differed from other networks, reflecting the presence of children in the household, as well as the audience's preference for self-care categories.



Auto Manufacturers: ESPN Viewers Show Higher Likelihood to Visit Car Dealerships

Analyzing a selected list of broadcast and cable networks, Placed found that ESPN viewers highly over-indexed in visitation to the four major car dealerships (GM, Toyota, Ford and Honda). GM showed the greatest skew with ESPN viewers 25% more likely to visit GM dealers than an average consumer.

- ABC and USA viewers were more likely to visit Toyota and Honda dealers than an average U.S. consumer, but were less likely to visit GM and Ford dealers.
- FOX viewers were more likely to visit Ford, Toyota and Honda dealers. FOX was the only major broadcast network to over-index in visitation to Ford dealers.

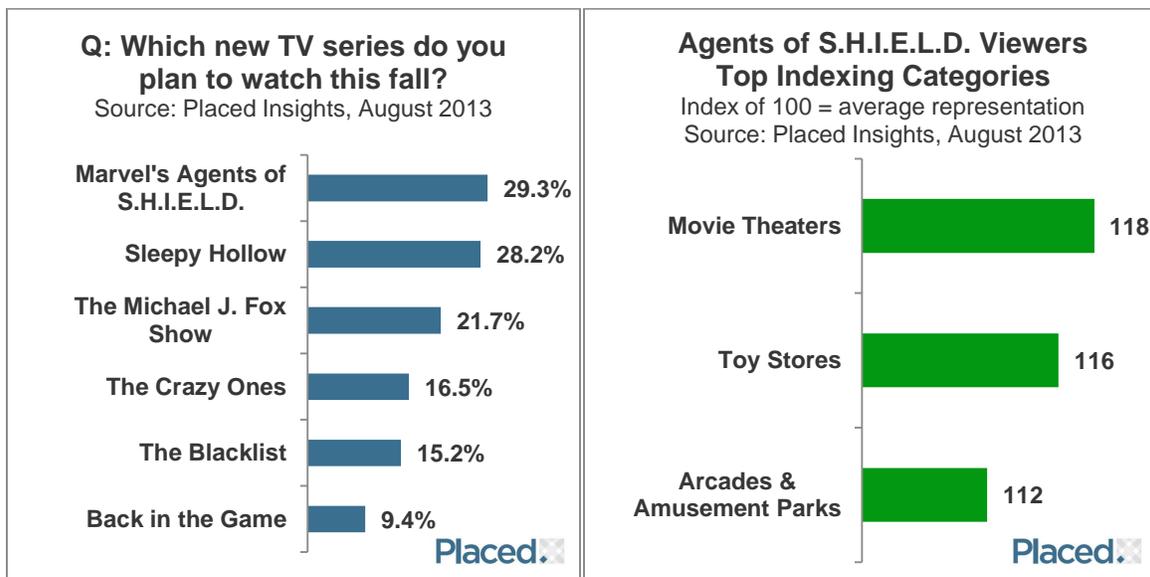


TV Series Insights

Marvel's Agents of S.H.I.E.L.D. Most Anticipated Show of the Fall

Using Placed Questions, the study asked panelists which new series they were planning to watch this Fall among a selected list of shows.

- Marvel's Agents of S.H.I.E.L.D. ranked as the most anticipated new TV series with 29.3% of respondents planning to watch the series, followed closely by Sleepy Hollow with 28.2% of respondents.
- Viewers who planned to watch Agents of S.H.I.E.L.D. were highly likely to visit Movie Theaters (index 118), Toy Stores (116), and Arcades & Amusement Parks (112). This highlights the offline and online consumer relationship with the Marvel franchise, which encompasses movies, action figures, games, and theme park rides.



AT&T, Verizon, Sprint and T-Mobile Shoppers and Their TV Viewing Habits

The four major wireless carriers (AT&T, Verizon, Sprint and T-Mobile) rank among the top spenders in [Ad Age's 25 Biggest Megabrands](#). With each wireless brand investing a significant amount of budget in TV advertising, Placed analyzed the relationship between wireless store visitors and their TV viewing behaviors.

- Across the major networks, the NBC audience was most likely to visit each of the four wireless providers' stores, with the highest index for AT&T (113).
- Among comedies, New Girl was the strongest indexing series for visitors to both AT&T (index 112) and Sprint (124) stores. Modern Family viewers were most likely to visit T-Mobile stores (128), while Big Bang viewers had the strongest skew for Verizon stores (113).
- Sprint store visitors displayed the strongest likelihood to watch reality TV, with Dancing with the Stars viewers 25% more likely to visit Sprint stores than an average consumer. In addition, Sprint, which has a partnership with The Voice, saw that viewers of this series were 16% more likely to visit Sprint stores.

- Analyzing the new TV series that respondents plan to watch revealed unique patterns across the wireless brands: AT&T (highest index for The Michael J. Fox Show), Verizon (highest index for The Blacklist), T-Mobile (highest index for Back in the Game), and Sprint (highest index for Agents of S.H.I.E.L.D.).

TV Show and Network Viewing Preferences Among Wireless Provider Store Visitors				
Index of 100 = Average Representation				
August 2013				
Source: Placed Insights				
	AT&T Wireless	Verizon Wireless	T-Mobile	Sprint
Major Network	NBC (Index 113)	NBC (Index 105)	NBC (Index 106)	NBC (Index 108)
Comedy (Returning Series)	New Girl (Index 112)	Big Bang (Index 113)	Modern Family (Index 128)	New Girl (Index 124)
Drama (Returning Series)	Once Upon a Time (Index 117)	Revolution (Index 117)	Revenge (Index 112)	Glee (Index 130)
Reality (Returning Series)	Biggest Loser (Index 118)	Amazing Race (Index 112)	X Factor (Index 117)	Dancing with the Stars (Index 125)
New Series	The Michael J. Fox Show (Index 119)	The Blacklist (Index 122)	Back in the Game (Index 135)	Agents of S.H.I.E.L.D. (Index 116)

Modern Family: Target, Apple, and Toyota Product Placement Relationships

Increasingly, brands are finding creative ways to integrate their goods and services directly into TV episodes through the use of product placements. In past seasons, Modern Family in particular has featured major brands through lifestyle product placements, most notably Toyota with the Prius, Target with a family shopping episode, and Apple with an episode focused on the release of the iPad.

Placed analyzed the retail stores Modern Family viewers were most likely to visit, and found strong relationships between Modern Family and visitation to all three brands, which underscores the strategic success of these placements.

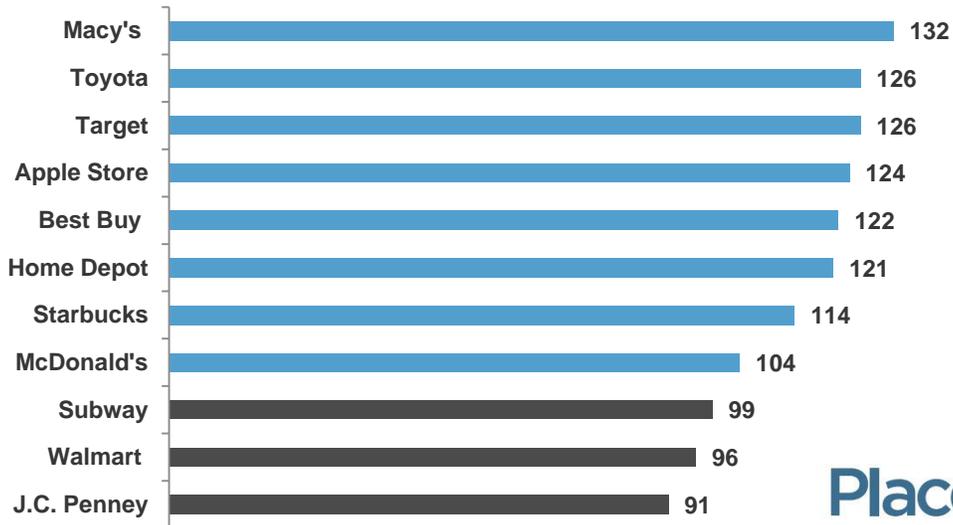
- Modern Family viewers were 26% more likely to visit Toyota dealerships and Target than an average consumer. They were also 24% more likely to visit the Apple Store than average. These three brands showed some of the highest indexes for show viewers among the advertisers studied.

The study also analyzed brands outside of these three to highlight other potential opportunities between Modern Family and a variety of advertisers.

- Macy's showed the strongest skew, with Modern Family viewers 32% more likely to visit a Macy's than an average consumer.
- Best Buy (index 122) and Home Depot (121) also showed strong skews among Modern Family viewers.
- Starbucks demonstrated the highest index among the food/beverage brands, with viewers 14% more likely to visit their stores.

Modern Family Viewers Visitation Index Among Selected Businesses

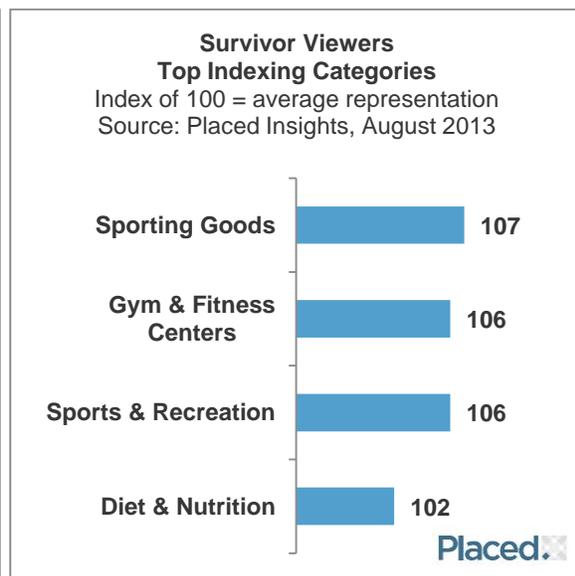
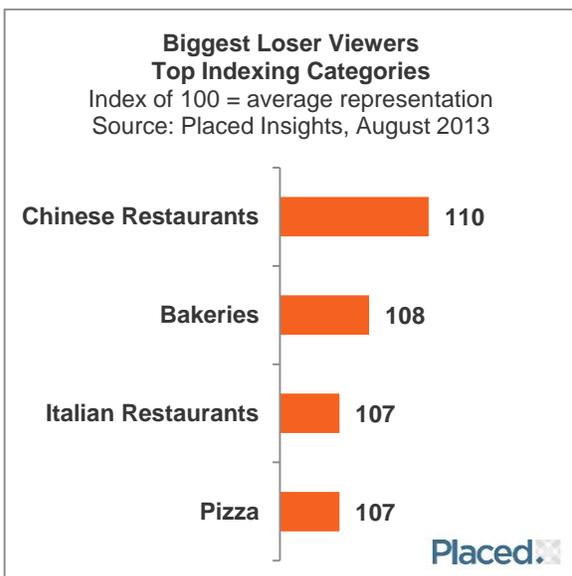
Index of 100 = average representation
Source: Placed Insights, August 2013



The Biggest Loser and Survivor Viewers Reveal Vastly Different Behaviors

The study also analyzed the behaviors of viewers of two of the most popular reality programs: The Biggest Loser and Survivor.

- Unexpectedly, The Biggest Loser viewers over-indexed for multiple food categories and were only 1% more likely to visit businesses in the Diet & Nutrition and Gyms & Fitness Centers categories than average.
- On the other hand, viewers of reality action/adventure show Survivor displayed proof of more active lifestyles, over-indexing in a variety of fitness-related categories led by Sporting Goods (index 107) and Gym & Fitness Centers (106).



Discover What Placed Insights Can Do For Your Business

Placed Insights reports on more than 130 business categories and 1,000 businesses. To learn more about Placed Insights and to request a demo specific to your business, please contact: sales@placed.com

About Placed Insights

Placed Insights is the first ratings service for the physical world, providing actionable intelligence into the paths and behaviors of U.S. consumers. Based on the world's largest location panel, Placed Insights combines innovative big data techniques with trusted market research methodologies to quantify offline consumer behavior. For more information about Placed Insights, please visit: <http://www.placed.com/placed-insights>

About Placed, Inc.

Placed is the leader in location-driven insights and mobile ad intelligence. Measuring billions of locations across the world's largest opt-in mobile location panel, Placed provides the most complete understanding of consumers' offline behaviors.

Connecting the physical and digital worlds, Placed gives brands, agencies, publishers and ad networks the ability to target location at scale, measure the offline impact of mobile ads, and deliver actionable insights into consumer behavior. Founded in January 2011, Placed is headquartered in Seattle and is backed by Madrona Venture Group. For more information about Placed and its location solutions, please visit: <http://www.placed.com/>

For more information, please contact:

[Placed, Inc.](#)

info@placed.com