# TV Drama Affinity Rankings

Jan - June 2018 Premieres

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helixa

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# Introduction

With an ever-increasing number of scripted TV shows from the major networks, Netflix pumping north of $7B into original content, and Amazon, Google, Facebook and Apple joining the fray, there just might be too much of a good thing on our TV screens. John Landgraf, CEO and philosopher king of FX, in 2015 coined the term "Peak TV" to highlight the problem of "too much television." At a more recent industry event, Landgraf went so far as to say, "The golden age of television has become the gilded age...I think there's too much story. Too much narrative."[1]

As TV programming grows ever more fragmented, understanding what makes each show's audience unique and different is key to finding the sweet spots between shows and advertisers. At Helixa, we leverage consumer interest data—which is based on passively observed online interactions of millions of consumers—to help media companies gain a rich, detailed understanding of their show's audience. Above and beyond Nielsen's TV ratings, media companies can now benchmark their audience's lifestyles, personality traits, interests and values. In turn, advertisers can pinpoint the high-value TV show audience who are more likely to find their products appealing.

In this report, we created affinity rankings for the Drama TV shows that premiered during the first half of 2018 for two key demographic segments (Women, Men—ages 18-49) to get a broader read on which shows appeal to each consumer segment. Then, we compare two top shows for each consumer segment that share similar audience demographics, and apply Helixa's psychographic and interest data to find out what makes each audience unique. Despite their demographic similarities, each show's audience has distinctive psychographic profiles, interests and passion points, which have important implications for brand advertisers.

As we illustrate in the next few pages, media companies can apply Helixa's interest and affinity data to differentiate their audiences, unpack the why's behind the numbers and identify the best possible advertising partners.

1. *The Playlist*

# Understanding Helixa's Affinity Index

Helixa tracks ~150M daily observed social behavior data points over a rolling 365-day period, and converts them into consumer interests and affinities for 26M+ brands, media and influencers. These observed consumer interests are expressed as the Affinity Index, which measures how the target audience you are analyzing is different from the average American adult.

- 0<Affinity<1: Your audience is less interested in the item than the average American adult
- Affinity=1: Your audience is as interested in the item as the average American adult
- Affinity>1: your audience is more interested in the item than the average American adult

The Affinity Index is calculated using the following formula:

$$\text{AFFINITY} = \frac{\text{\% of people who are interested in the show within your target}}{\text{\% of people who are interested in the show among US adults 18-69}}$$

For more information about Helixa's data sources and methodology, refer to page 17.
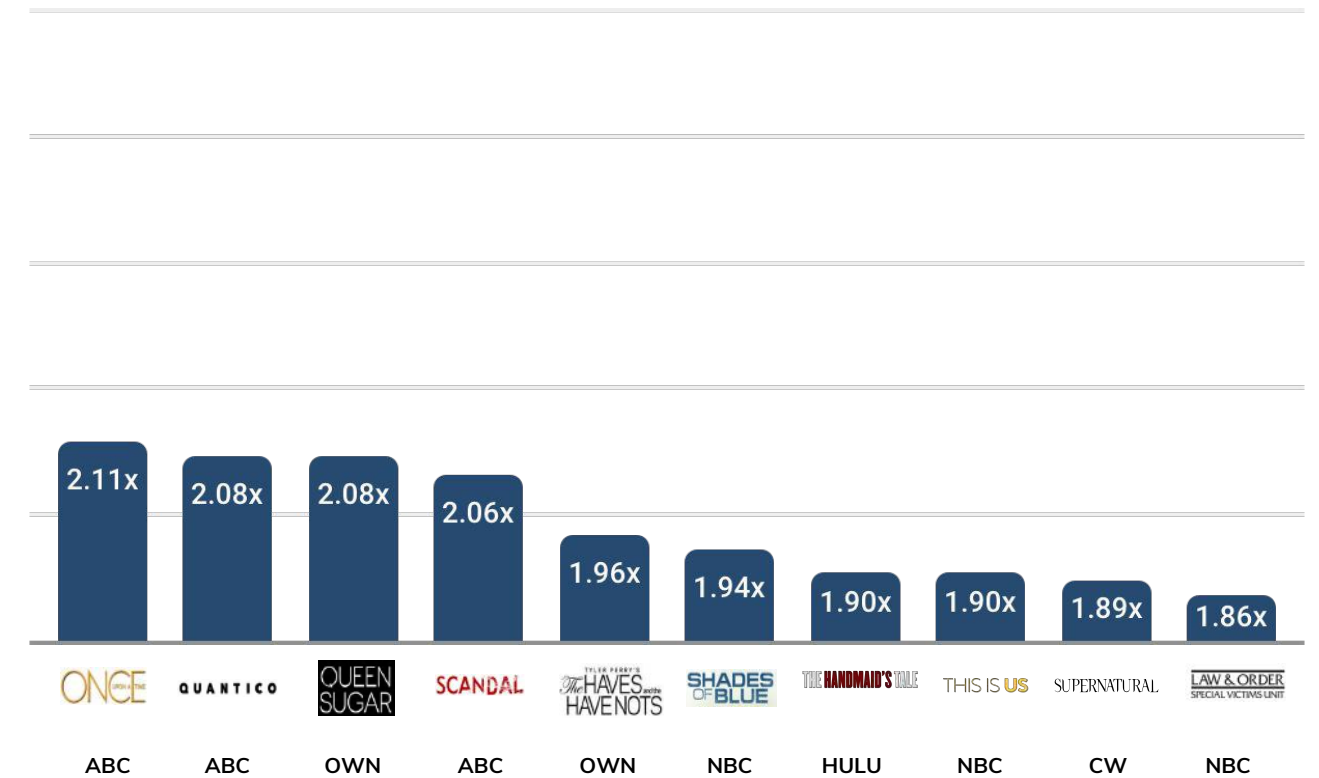
# Top 20 TV Drama Shows by Affinity
## Women 18-49

The Bold Type, The Fosters and 13 Reasons Why enjoyed the strongest interest among women 18-49. While they weren't the shows with the highest viewership, Helixa's affinity data indicates they were incredibly successful at creating passionate and engaged female viewers.
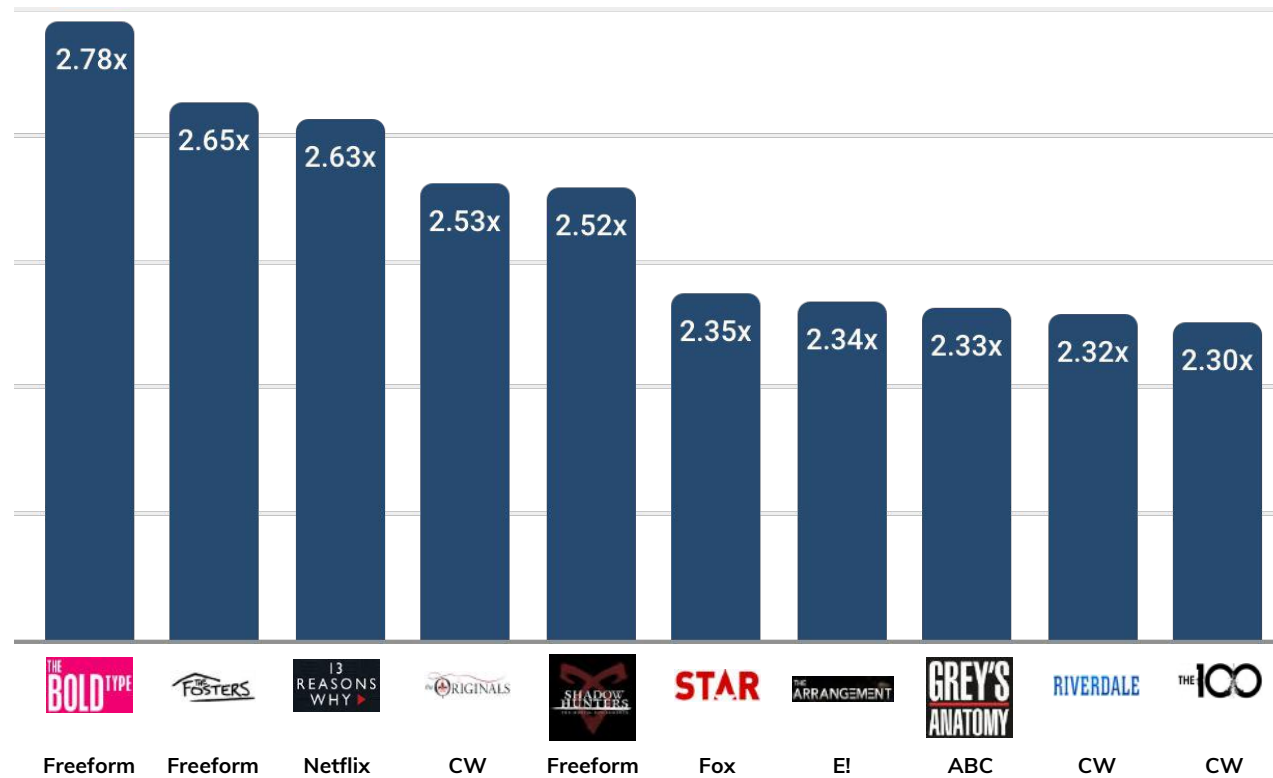
The Affinity Index for the top 20 drama shows among women 18-49 ranges from 2.78x for The Bold Type to 1.86x for Law & Order SVU. To put it differently, women 18-49 viewers are 2.78 times more likely to be interested in The Bold Type and 1.86 times more likely to be interested in Law & Order SVU than an average American adult.

**Helixa Affinity Index**



| Show | The Bold Type | The Fosters | 13 Reasons Why | The Originals | Shadowhunters | Star | The Arrangement | Grey's Anatomy | Riverdale | The 100 |
|---|---|---|---|---|---|---|---|---|---|---|
| Affinity | 2.78x | 2.65x | 2.63x | 2.53x | 2.52x | 2.35x | 2.34x | 2.33x | 2.32x | 2.30x |
| Network | Freeform | Freeform | Netflix | CW | Freeform | Fox | E! | ABC | CW | CW |



| Show | Once Upon a Time | Quantico | Queen Sugar | Scandal | The Haves and the Have Nots | Shades of Blue | The Handmaid's Tale | This Is Us | Supernatural | Law & Order SVU |
|---|---|---|---|---|---|---|---|---|---|---|
| Affinity | 2.11x | 2.08x | 2.08x | 2.06x | 1.96x | 1.94x | 1.90x | 1.90x | 1.89x | 1.86x |
| Network | ABC | ABC | OWN | ABC | OWN | NBC | HULU | NBC | CW | NBC |

For more information about Helixa's data sources and methodology, refer to page 17.

# *Once Upon a Time* vs. *Supernatural*
## Women 18-49

*Once Upon a Time*, an enchanted fairy-tale set in the modern times, and *Supernatural*, a horror fantasy drama, share uncannily similar audience demographics. In addition to both being the top shows among women 18-49, the shows' audiences share similar geographic and household income distributions. While they look similar on the surface, Helixa's psychographic and interest data show that these two audiences are quite different from each other.
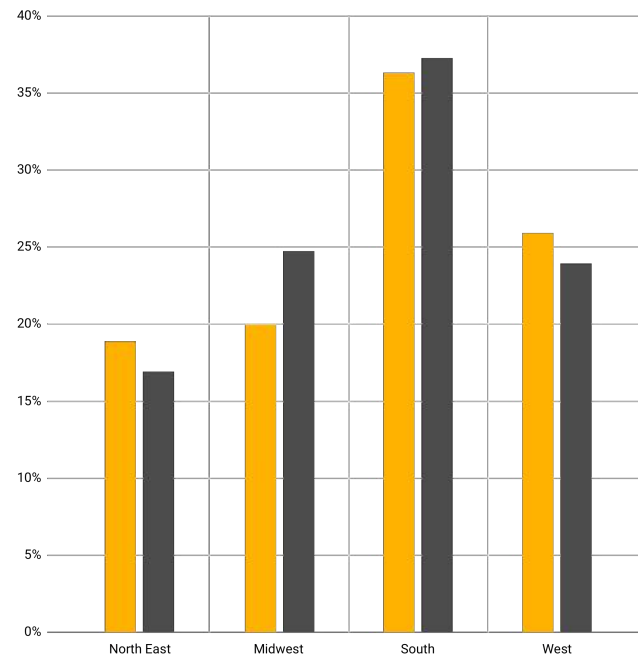
## Geographic and Income Distributions
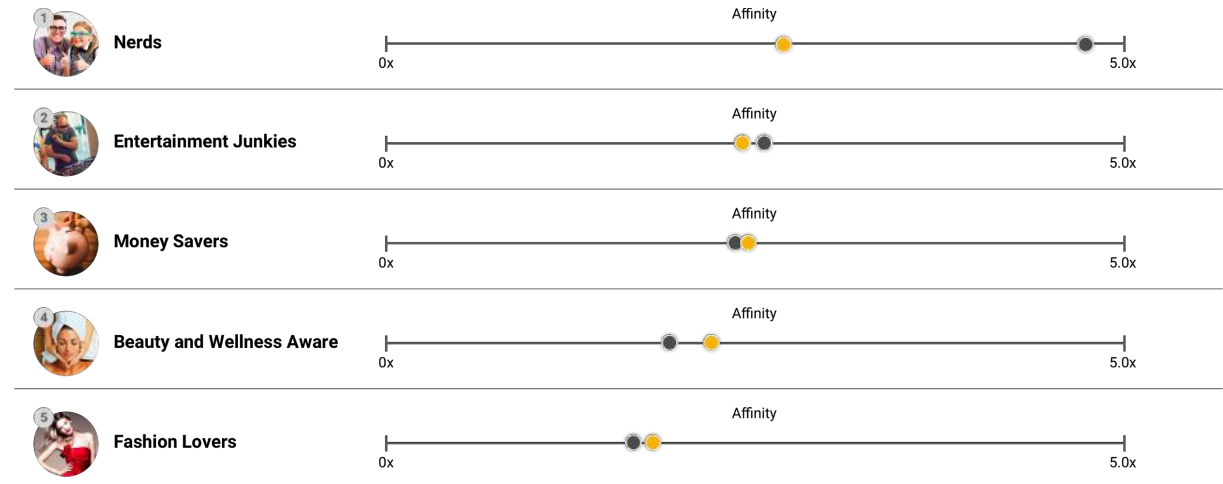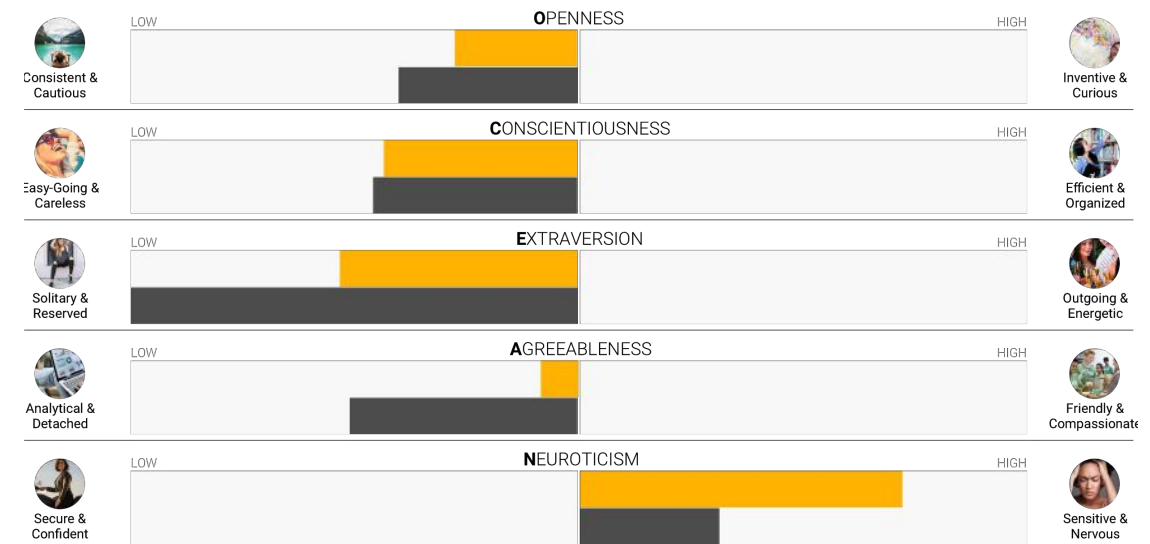
### HOUSEHOLD INCOME
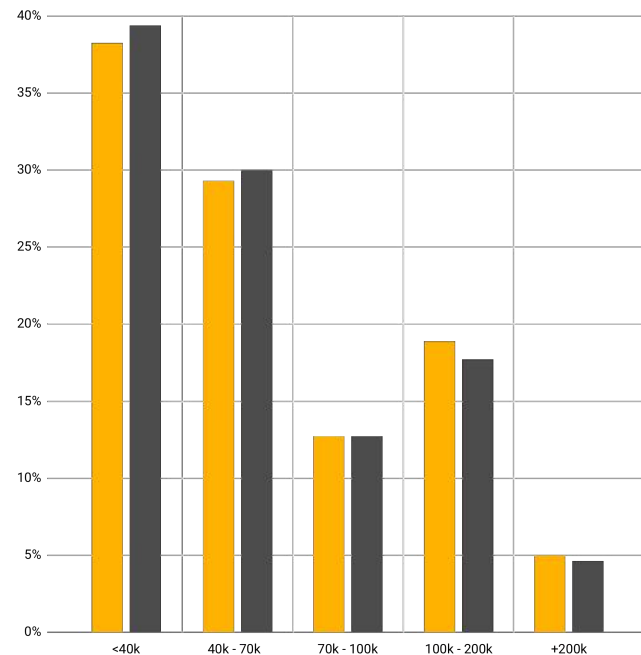
### REGION



For example, *Supernatural*'s audience has a significantly higher affinity for the "Nerds" lifestyle, which suggests strong intellectual curiosity and attention to details. They are also significantly more subdued ("Solitary & Reserved"), and more competitive and self-centered ("Analytical & Detached") than those of *Once Upon a Time*.

## Top Lifestyles

1. Nerds
2. Entertainment Junkies
3. Money Savers
4. Beauty and Wellness Aware
5. Fashion Lovers



## Big Five Personality Model (OCEAN)

OPENNESS — Consistent & Cautious / Inventive & Curious

CONSCIENTIOUSNESS — Easy-Going & Careless / Efficient & Organized

EXTRAVERSION — Solitary & Reserved / Outgoing & Energetic

AGREEABLENESS — Analytical & Detached / Friendly & Compassionate

NEUROTICISM — Secure & Confident / Sensitive & Nervous

# Once Upon a Time vs. Supernatural
## Women 18-49

When we drill down into specific interest categories, the two shows' audiences begin to diverge even more. In the examples below, *Once Upon a Time*'s audience shows significantly higher affinities towards beauty brands, whereas *Supernatural*'s audience is much more interested in select chain restaurant brands.

For Covergirl, *Once Upon a Time*'s audience affinity is 61% higher than that of *Supernatural*'s. On the other hand, *Supernatural*'s audience affinity towards Denny's is 45% higher than that of *Once Upon a Time*'s. What's the implication? A brand advertiser that shares a higher affinity with a show's audience is more likely to engage the viewers and achieve a higher ROI.

### Once Upon a Time's Audience is More Interested in Beauty Brands

| | Brand | ONCE UPON A TIME | | SUPERNATURAL |
|---|---|---|---|---|
| 1 | COVERGIRL | 2.42x | +0.92 | 1.50x |
| 2 | Clean & Clear | 3.24x | +0.76 | 2.48x |
| 3 | Neutrogena | 2.92x | +0.47 | 2.45x |
| 4 | REVLON | 2.68x | +0.47 | 2.21x |
| 5 | MAYBELLINE NEW YORK | 2.46x | +0.45 | 2.01x |

### Supernatural's Audience is More Engaged with Chain Restaurant Brands

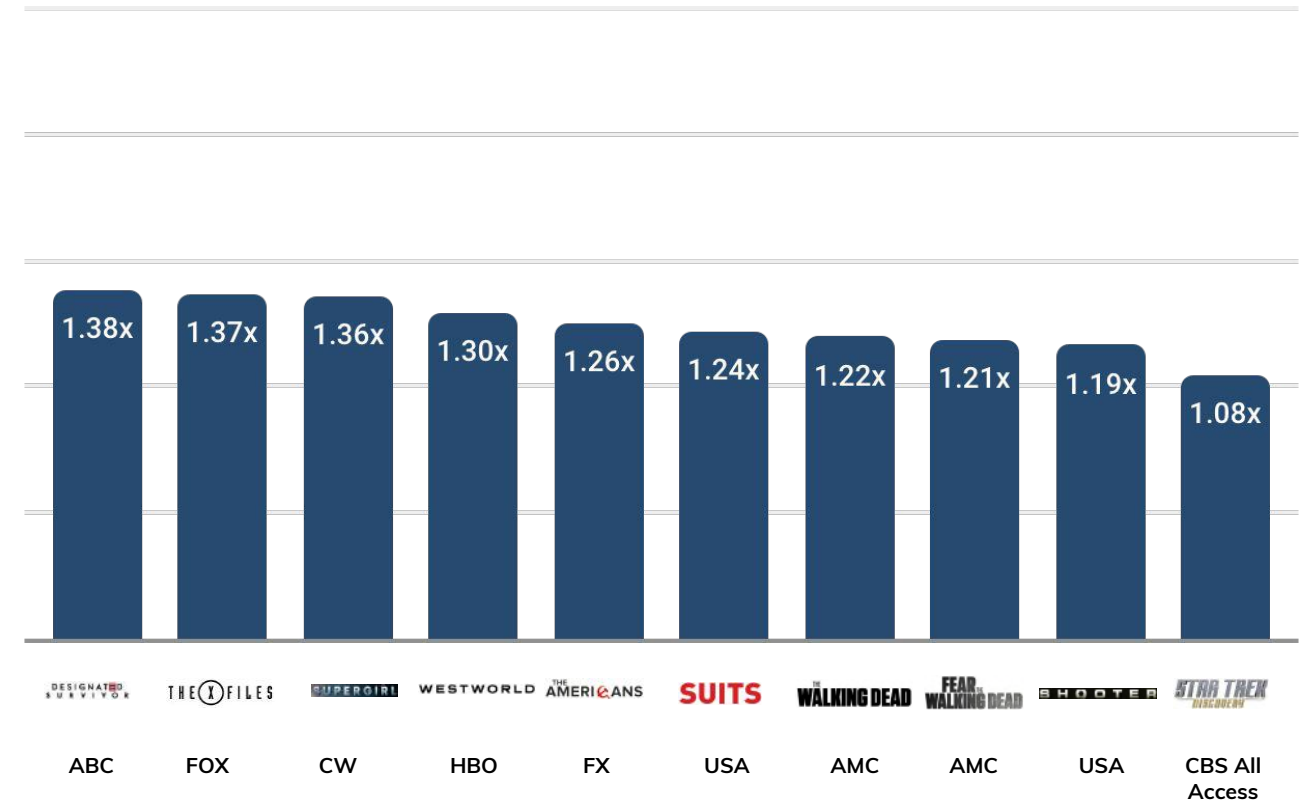| | Brand | ONCE UPON A TIME | SUPERNATURAL | |
|---|---|---|---|---|
| 1 | Denny's | 1.52x | 2.20x | +0.68 |
| 2 | Taco John's | 1.02x | 1.28x | +0.26 |
| 3 | Church's Chicken | 0.97x | 1.20x | +0.23 |
| 4 | Wendy's | 1.26x | 1.43x | +0.17 |
| 5 | Arby's | 1.23x | 1.40x | +0.17 |

# Top 20 TV Drama Shows by Affinity
## Men 18-49

*Into The Badlands*, *The Flash* and *The Expanse* score the highest among men 18-49. Action and super-hero sub-genres get the edge over sci-fi and fantasy across the top of the rankings, but there is good diversity across the top 20, showing the range of appealing drama content themes for men.

**Helixa Affinity Index**



| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 2.32x | 1.94x | 1.80x | 1.75x | 1.74x | 1.69x | 1.68x | 1.60x | 1.60x | 1.54x |
| BADLANDS | FLASH | EXPANSE | LEGION | CAGE | THE MAGICIANS | GOTHAM | JESSICA JONES | ASH VS EVIL DEAD | ARROW |
| AMC | CW | Amazon | FX | Netflix | SYFY | FOX | Netflix | Starz | CW |
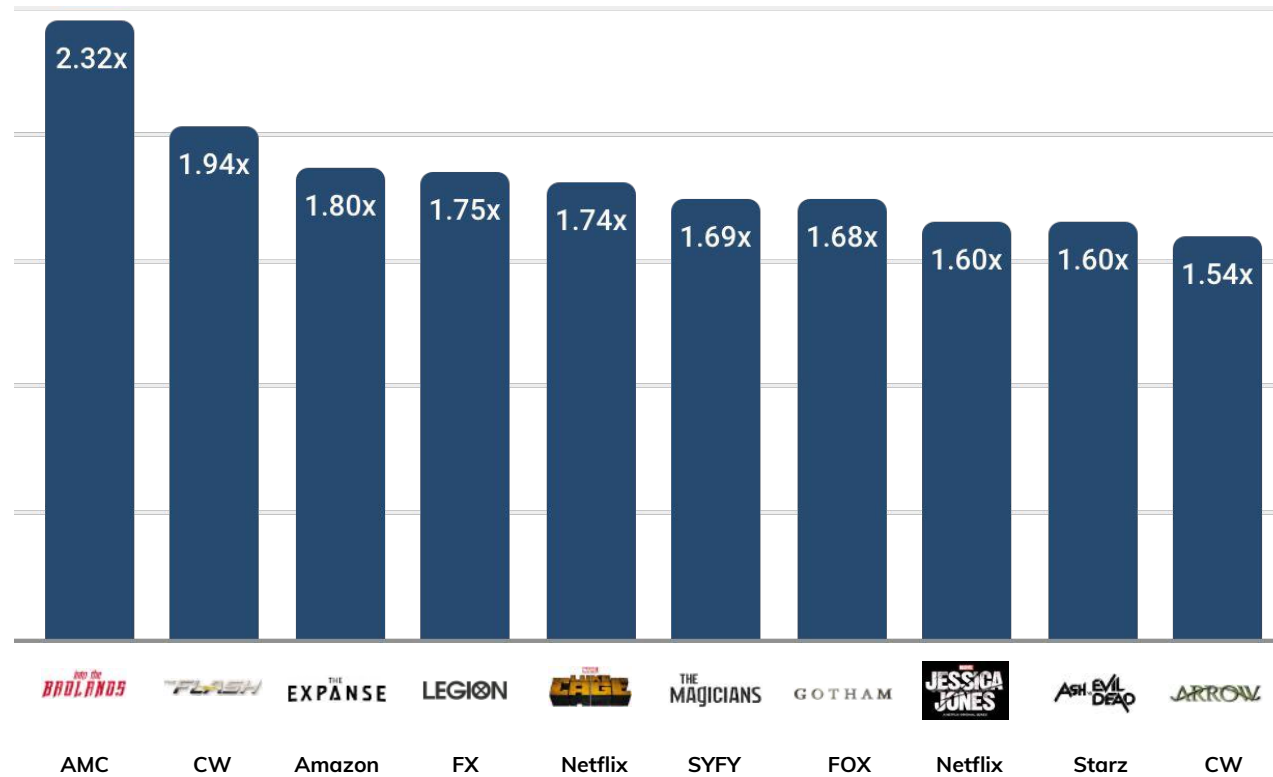
While all these shows are quite effective at engaging the men 18-49 audience, an in-depth analysis using Helixa's affinity data illustrates that different show audiences share different passion points, interests and motivations. Helixa's affinity data can help TV networks uncover deeper understandings about each show's audience to identify the right advertising partners whose marketing messages are likely to resonate with that audience.

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 1.38x | 1.37x | 1.36x | 1.30x | 1.26x | 1.24x | 1.22x | 1.21x | 1.19x | 1.08x |
| DESIGNATED SURVIVOR | THE X-FILES | SUPERGIRL | WESTWORLD | THE AMERICANS | SUITS | THE WALKING DEAD | FEAR THE WALKING DEAD | SHOOTER | STAR TREK DISCOVERY |
| ABC | FOX | CW | HBO | FX | USA | AMC | AMC | USA | CBS All Access |

For more information about Helixa's data sources and methodology, refer to page 17.

# *Designated Survivor* vs. *The Walking Dead*
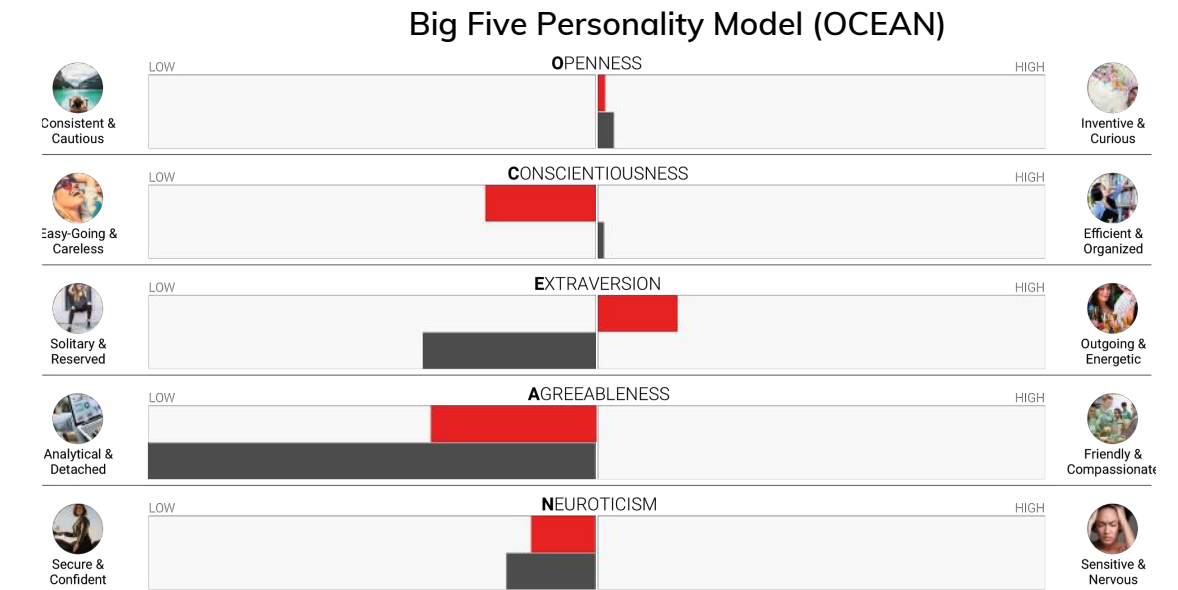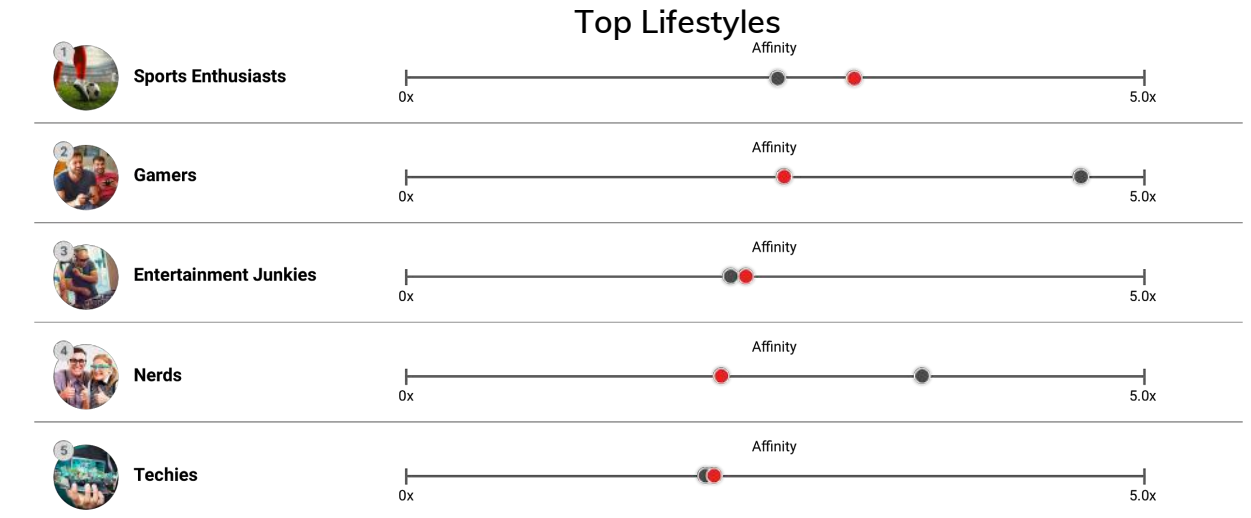## Men 18-49

As an example, let's look a little more closely at two shows, *Designated Survivor* and *The Walking Dead*. Demographically, there is very little differentiation. However, when we digged a little deeper, *Designated Survivor* attracts the outgoing-sports-enthusiast types, whereas *The Walking Dead* attracts the analytical-nerd types.

### Geographic and Income Distributions



REGION

HOUSEHOLD INCOME
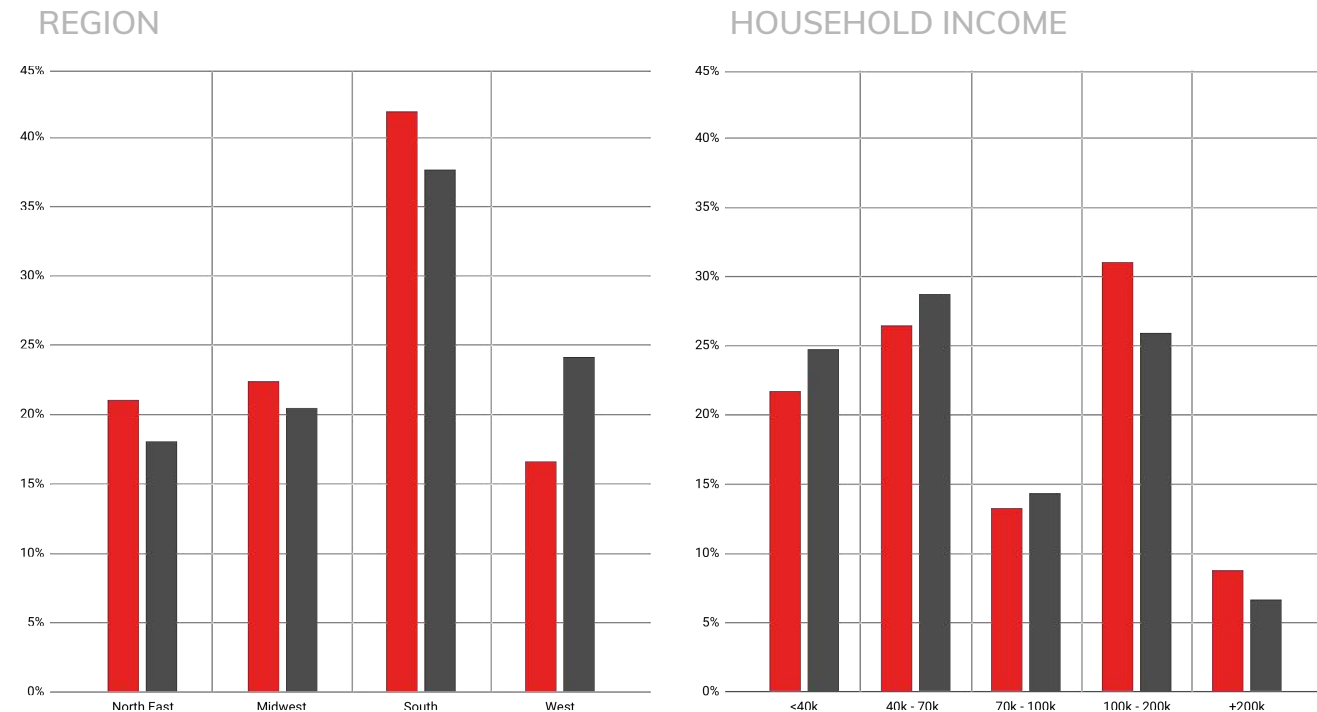
For example, *The Walking Dead*'s audience are much more serious gamers and are skewed towards "Solitary & Reserved." On the other hand, *Designated Survivor*'s audience is more into watching and playing sports, and is more "Outgoing & Energetic."

### Top Lifestyles



1. Sports Enthusiasts
2. Gamers
3. Entertainment Junkies
4. Nerds
5. Techies

### Big Five Personality Model (OCEAN)



OPENNESS — Consistent & Cautious / Inventive & Curious
CONSCIENTIOUSNESS — Easy-Going & Careless / Efficient & Organized
EXTRAVERSION — Solitary & Reserved / Outgoing & Energetic
AGREEABLENESS — Analytical & Detached / Friendly & Compassionate
NEUROTICISM — Secure & Confident / Sensitive & Nervous

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# Designated Survivor vs. *The Walking Dead*
## Men 18-49

When we analyze the top interest categories for these two shows, we see a much more nuanced picture of what makes each audience unique. For example, the *Designated Survivor* audience is more interested in water and juice brands, whereas *The Walking Dead* audience is much more interested in energy drink brands.

The *Designated Survivor* fans' affinity for FUZE Tea is more than two times higher than that for *The Walking Dead*'s audience. On the other hand, *The Walking Dead* fans' affinity towards NOS is more than three times higher than that for the *Designated Survivor*'s audience.

### Designated Survivor's Audience Prefers Healthy Beverage Options

| # | Brand | DESIGNATED SURVIVOR | | THE WALKING DEAD |
|---|-------|---------------------|--------|------------------|
| 1 | FUZE | 2.72x | +1.42 | 1.30x |
| 2 | V8 | 1.95x | +1.32 | 0.63x |
| 3 | evian | 1.65x | +0.57 | 1.08x |
| 4 | perrier | 1.11x | +0.47 | 0.64x |
| 5 | Poland Spring | 1.20x | +0.45 | 0.75x |

### The Walking Dead's Audience Loves Energy Drinks

| # | Brand | DESIGNATED SURVIVOR | THE WALKING DEAD | |
|---|-------|---------------------|------------------|--------|
| 1 | NOS ENERGY DRINK | 0.71x | 2.63x | +1.92 |
| 2 | MONSTER ENERGY | 0.78x | 2.23x | +1.45 |
| 3 | ROCKSTAR ENERGY DRINK | 0.63x | 1.76x | +1.13 |
| 4 | BURN ENERGY DRINK | 0.24x | 1.20x | +0.96 |
| 5 | Red Bull | 1.10x | 2.04x | +0.94 |

# Methodology & Glossary

## About Helixa
Helixa is an AI-powered consumer intelligence platform that helps media companies, brands and agencies make better decisions with accurate, timely insights. Our AI engine uncovers insights about consumers and benchmarks their affinities against 26M+ brands, influencers, media and more.

## Methodology
Helixa observes real-time social media interactions of millions of consumers, and applies machine-learning algorithms to calculate consumer interests and affinities. We also overlay the survey data from MRI and Simmons Research to provide a deeper understanding about the American consumer's consumption habits, opinions and attitudes. To fuse the datasets from MRI and Simmons, we use advanced look-alike modeling to match the most similar respondents based on a detailed set of linking variables such as demographic traits and psychographic traits.

Our consumer data is calibrated against the latest U.S. Census studies (ACS and CPS) to ensure that all the analyses reflect a picture of the real world. Our goal is to create the most accurate representation of the American consumer.

The analysis for this report was conducted using Helixa's affinity data between Aug 15 - Aug 22, 2018. Shows that did not meet a minimum threshold of at least 1.5% reach (see below for our definition for "reach")  or for which we did not have sufficient data were excluded.

## Glossary
- Affinity Index: Measures the degree to which a specific audience is interested in something relative to the average American adult.
- Reach: Measures the percentage of consumers within your target audience who share a specific trait or interest.