

STARCOUNT

Whitepaper:
Many Faces of Entertainment



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Sit down. Tune in.

Claire. 23.

Claire's alarm goes off on her smartphone at 7am and, after switching it off, she scrolls through Twitter, Instagram and the BBC News app. Before getting ready for the day, she logs into a catch-up service on her tablet and, while she dresses, she keeps one eye on a new three-part thriller that was aired the previous evening. During the working day, Claire occasionally checks her Facebook and Twitter timelines, and pauses to watch a viral clip from an American late-night talk show, sharing it with a colleague. At home that evening, Claire brings her tablet into the kitchen with her, flicking back and forth between a recipe and her favourite vlogger's new YouTube beauty tutorial while she cooks dinner. She usually eats in front of the TV and is keen to watch the latest episode of Game of Thrones but has promised to save it to watch with her housemate, who is working late. Instead, she turns on Netflix and chooses an old, familiar sitcom. Her housemate arrives home just in time for the latest episode of the Great British Bake Off and they watch together, chatting about their favourite contestants and live-tweeting along with the show. In bed, as she winds down for the night, Claire watches a short TED talk, before setting her alarm and switching off the light.

How do you spend your screen time?

It may seem like a lot of time in front of a screen, but Claire's profile is typical of the modern relationship between an individual and the world of onscreen entertainment. Our content addiction has reached an all-time high – but this addiction is in constant motion, leaving the tech and media industries struggling to keep up. Expectations have never been higher, but audience wants and needs have never been more fluid. Not only do our tastes, preferences and viewing behaviours change as we move through different lifestyles, but they also shift depending on who we're with, how we feel, the time of day, how busy we are and even the weather.

What's more, the entertainment world is flooded with mixed messages and contradictions: to go viral, content must work well without the sound but better with it; original ideas win the most awards but the top TV shows adapt other people's stories; the best adverts tap into the zeitgeist but the worst exploit it; successful games are either deceptively simple and inexpensive to make or epic exercises in world-building with a Hollywood budget. Add to this an ever-increasing choice of ways to watch across different devices, platforms and channels, and it's easy to see why broadcasters, streaming services, production companies and content creators of all shapes and sizes are under intense pressure.

Data is fuelling creativity

There are three strands to thriving in the onscreen entertainment world: improve the content you create, improve the way you distribute that content and improve the viewing experience for those who consume that content. The answer to all three of those strands? Customer insight. With the lines between content creators, broadcasters, agencies and platforms ceasing to exist, there's an unprecedented opportunity for media and entertainment brands to cut out the middlemen and really get to know their customers – improving CRM with targeting and personalisation, driving deeper creativity and engagement, and enhancing the overall audience experience.

The increasing importance of data to the entertainment industry is not news. The rise of streaming services has triggered a flood of data-driven strategies, with consumers' viewing patterns being used to decide everything from which type of shows to commission to which actors to cast. Broadcasters are beginning to enhance traditional methods of customer understanding (such as BARB) with digital data; catch-up services, for example, now require customers to register, to facilitate the collection of data about what viewers like to watch and when they like to watch it. Meanwhile, social media platforms such as Facebook, Twitter and Snapchat are combining innovative video capabilities with a wealth of user data, giving them an inbuilt advantage when it comes to consumer insight that is very attractive to sponsors and advertisers.

However, when it comes to the use of customer data, there's an additional hurdle to consider. Modern consumers are much more savvy and less brand loyal. They have higher expectations, are impatient with adverts and, aware of the value of their personal information, are wary of giving anything away for free. They want platforms that are flexible, affordable and reliable. What's more, younger viewers in particular, who have grown up in the digital age, are used to accessing content at the push of a button and many are willing to resort to illegal links to find what they want if it isn't easily and immediately accessible. While the rise of digital streaming services has helped to reduce the pervasiveness of piracy, there is likely to be a backlash as the market becomes increasingly fragmented. As more and more media brands launch their own platforms they risk isolating audiences who want to access the widest variety of content as easily as possible, rather than constantly switching between paid-for services.

Personalisation, too, has its risks; relevance is key to a positive user experience, but features such as personalised recommendations can mean that certain content is hidden from users who aren't recognised as the 'target audience', leading those users to become bored with a particular service because they feel they've exhausted its potential, or even resentful that they're being stereotyped by an algorithm.

When it comes to developing a data-driven strategy, entertainment and media brands must focus on shifting from a reactive state to a proactive one. Rather than focusing on how consumers have behaved in the past or trying to catch up with what they're doing in the present, brands must focus on what they'll want in the future – and this requires a new form of data science. By tapping into the latest digital data sources, such as Starcount's Observatory, you can understand not only what and how people are watching, but also why: their mindsets, motivations, influences and passions. With this insight, you can create content that will truly engage them and discover the most relevant channels through which to reach them.

Friends or foes?

To stand out and encourage loyalty in a market saturated with high-quality content, brands and broadcasters need to stay one step ahead of trends, tap into consumer passions and mindsets, and develop strategies to engage, grow and reward their most valuable customers. Often that will mean collaborating with those who could easily be considered competition, in order to create a win-win situation.

Holistic storytelling is a crucial part of the modern entertainment experience. A new TV show might be based on a game and be promoted via a social media campaign, influencer recommendations and print media, at the very least, working across channels and platforms that traditionally would be competing with each other for audience attention.

This ecosystem has led to a market where siloes between different types of media are no longer relevant. Viewing habits are no longer dictated by a schedule, pre-decided by broadcasters; instead, consumers can dip in and out of TV shows, films and games, or even absorb multiple types of content at once. What's more, the sheer volume of content to suit every taste and mood means that you can't rely on any assumptions or stereotypes of who these audiences are. While a teenage boy is gaming in his bedroom, his mother is likely to be swiping through a game of Candy Crush on her phone downstairs. In fact, when it comes to understanding viewing habits, Starcount's data reveals that mindsets are much more significant than ages or other traditional demographics.

More and more media campaigns are maximising the potential of this newly integrated environment to engage hard-to-reach audiences. To promote *The Handmaid's Tale*, Hulu created an experiential campaign, having women appear at public events dressed in the eye-catching red cloaks featured in the series in order to emphasise the real-life relevance of the book's political message. Netflix launched its *Iron Fist* series by sharing a code that could be entered on gaming sites to reveal exclusive behind-the-scenes footage, as well as hiring gaming influencers to livestream themselves facing off in honour of the show. BT Sport partnered with Facebook, Twitter and YouTube in a bid to reach younger audiences, even deciding to livestream the May 2017 Champions League final on YouTube for free. Even Marks & Spencer has taken this approach, boosting the popularity of their Mrs. Claus Christmas advert by partnering with Channel 4's Gogglebox, launching a line of Mrs. Claus products and even having the character take over their Twitter account.

These campaigns, and many more like them, prove that brands and broadcasters are waking up to the need to work with and learn from competing channels and content creators in order to survive the changing media landscape.

TV isn't going anywhere; it's going everywhere.

Innovation is not a new concept for the media industry. From 360° video to VR headsets, voice recognition software to smart mirrors, companies are investing heavily in technology as a route to creating the best possible user experience and securing customer loyalty. However, despite astounding digital advances, many brands and broadcasters are still looking at their customers through the lens of traditional demographics and lack the customer insight to match their bold technological steps.

By focusing on standard measurements and modes of segmentation such as age and address, as well as measuring the success of a show by ratings alone, broadcasters and content creators are in danger of ignoring what truly differentiates their audiences: their passions, mindsets and motivations.

Data from The Observatory not only allows you to see your viewers as individuals with their own distinct lifestyles and desires; it also provides brands with a macro view of the industry within which they sit – the key players and disrupters, upcoming trends and a detailed understanding of their place within it. By combining deep customer knowledge with broad market insight, you can anticipate trends, influencers, big hits and, ultimately, customer needs before they arise.

Technological developments have also led to much-needed innovations within advertising and ecommerce, opening the door to a golden age by providing an opportunity for three-dimensional conversations with consumers. Voice recognition software, for example, will enable adverts to become vocally interactive – a game changer for sponsorship. What's more, new household gadgets will encourage consumers to share revealing personal information, that can then be used by broadcasters and content creators to inform targeting. Take a question about the weather, for example: through a search engine, you might enter a generic phrase such as 'weather in London', while with an intelligent personal assistant, you can ask aloud 'Will it rain here tomorrow?'. Everything from the tone of your voice to the words you use can be collected by the device to gain a clearer picture of your emotional state; when analysed correctly, this data becomes an invaluable tool in understanding mindsets and predicting future intent.

All of this new customer insight will have the power to revolutionise the matching of advertisers and shows; while the current model has advertisers choosing programmes based on demographics and size of audience, insight from Starcount's Observatory gives a much more accurate perspective on which brands match best with which content and channels, depending on which specific audiences they want to reach.

The gamification of entertainment

The continuous rise of the gaming industry has had a significant effect on the entertainment landscape as a whole, with growing digital trends amongst younger viewers triggering a dramatic shift in the way that live content is consumed. The traditional sports rights model has been significantly disrupted by new players such as Facebook, YouTube and Twitter acquiring the right to livestream sporting events; meanwhile, TV audiences are dropping and sponsors are becoming harder to acquire. On the other hand, eSports has gone from strength to strength, with football clubs signing up Fifa players and even talk of an eSports category at the Olympics¹. While the entertainment industry is aware of the eSports phenomenon, it's still unclear how exactly advertisers will interact with the games and how broadcasters will become an integral part of the conversation. In the meantime, these broadcasters are attempting to tap into the trend and engage younger audiences by gamifying existing content, with ideas including using racing drone cameras to film Formula One events.

The growth of gamification is one of many trends that broadcasters and content creators are seizing upon as the answer to encouraging sustained engagement and loyalty from elusive and fickle audiences. However, in order to maximise the true value of such trends, you need to be able to predict them before they arise. What's more, people's lives, needs and interests are changing every day; staying one step ahead while retaining the integrity of the brand and providing genuine, relevant content requires a level of agility and forward planning that can be difficult to master without a rock solid foundation of customer insight. By enriching existing customer knowledge with real-time, global, third-party data sources like The Observatory, you can understand the mindsets that lie behind the trends and align yourself with what your audience truly wants to see.



¹ <http://www.scmp.com/news/china/society/article/2108501/violent-video-games-have-no-place-olympics-e-sports-are-still>

The many faces of entertainment study

Key Statistics*

11,211,082
UK base

8,523,108
MFOE audience size

28.1%
MFOE Audience growth

5
Mindsets

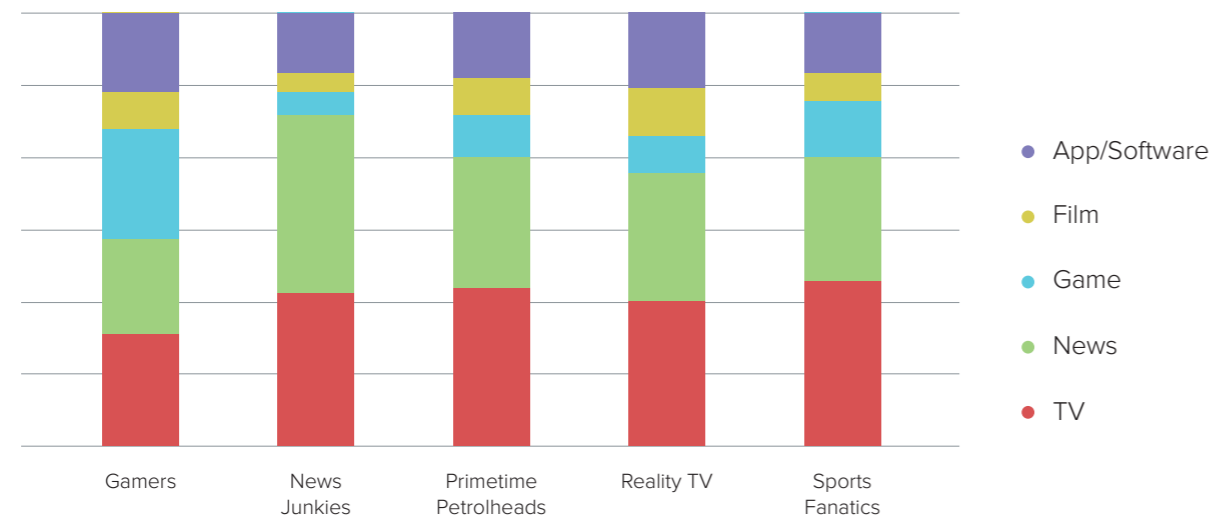
It's clear that people vary widely when it comes to their consumption of digital entertainment. Using pioneering data science, Starcount has delved into the specific passions that lie behind audience viewing habits. By analysing how these passions cluster together into different mindsets, we have gained a granular, robust and truly data-driven insight into the diverse 'Many faces of entertainment' market and how different UK consumers are spending their time and money within it.

Mindset	% of Audience	Size	UK Equiv.
Gamers	28.7%	2,445,046	14,514,015
News Junkies	45.6%	3,890,187	23,092,504
Primetime Petrolheads	36.0%	3,067,895	18,211,303
Reality TV Lovers	40.5%	3,449,511	20,476,611
Sports Fanatics	47.5%	4,048,010	24,029,355

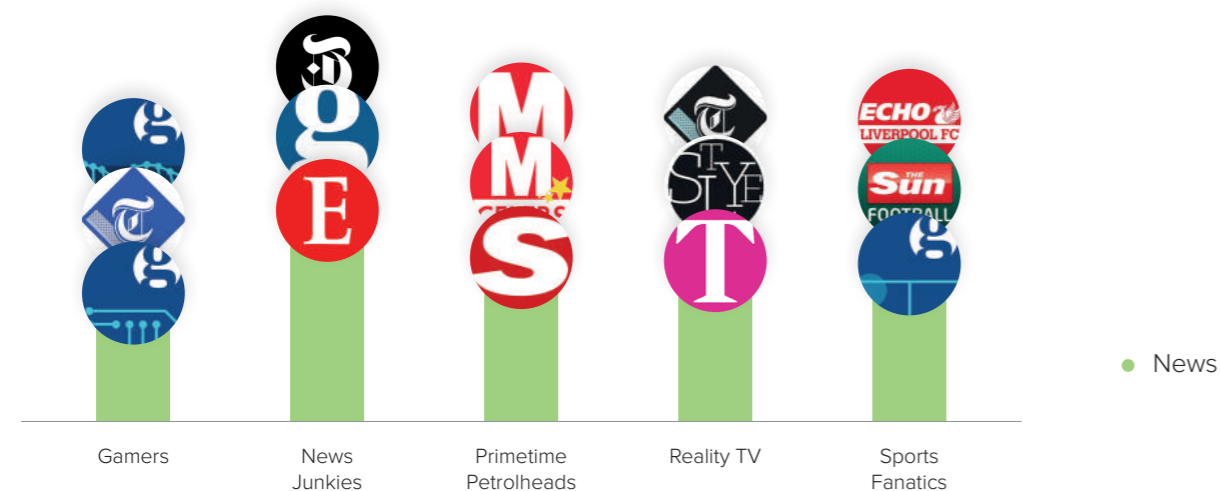
* Our data is extracted from Starcount's proprietary platform The Observatory, a database of over 1 billion global consumers.

Your competition is broader than you think...

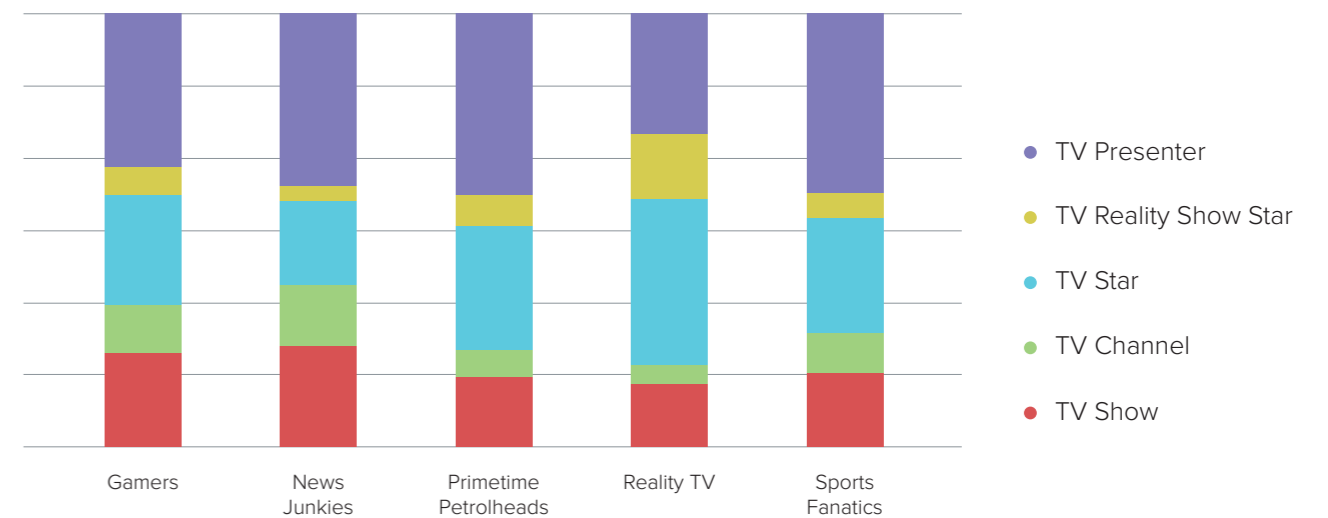
By examining how much different types of media resonate with each mindset, it becomes clear that content creators are competing—both directly and indirectly—across all channels, platforms and genres, rather than only within their immediate sphere.



While each of these mindsets is interested in a range of apps, films, games, TV and print media, the degree to which they care about each of these media types varies depending on their passions and priorities. What's more, each of these mindsets prioritises different stars within each media type. Take 'News', for example: while Reality TV lovers devour fashion news in the Times Fashion, Sunday Times Style and Telegraph Fashion supplements, Primetime Petrolheads read The Sun and the Daily Mirror. News Junkies prefer to get their updates from trustworthy sources such as the BBC, Channel 4 and Sky news programmes, while Gamers are focused on tech and science updates in the Guardian and Telegraph supplements and Sports Fanatics devour The Sun's football section.



We can also understand what attracts particular mindsets to different media types – some will watch anything fronted by their favourite presenter or starring their favourite actor, while others stay loyal to particular shows no matter who is associated with them. TV stars like Charlotte Crosby and Joey Essex are important to the Reality TV Lovers, for example, while Primetime Petrolheads followed James May and Jeremy Clarkson from Top Gear to The Grand Tour.



Understanding mindsets



Mindsets are motivations that unite large consumer groups across industries. They lie behind people's passions, reflecting their genuine values, personalities and lifestyles (for example, are they trend-driven, health-conscious or eco-friendly?). Mindsets can only be algorithmically determined on data sets like Starcount's social graph; very few other data sets are large enough to represent people's passions accurately, and even fewer offer such rich insight into how people spend their time.

Starcount's mindsets rely on a real time, traceable and global database, organised so that each social 'star' (entity) represents a passion, meaning that patterns can be traced clearly and automatically, rather than being retroactively interpreted and assigned.

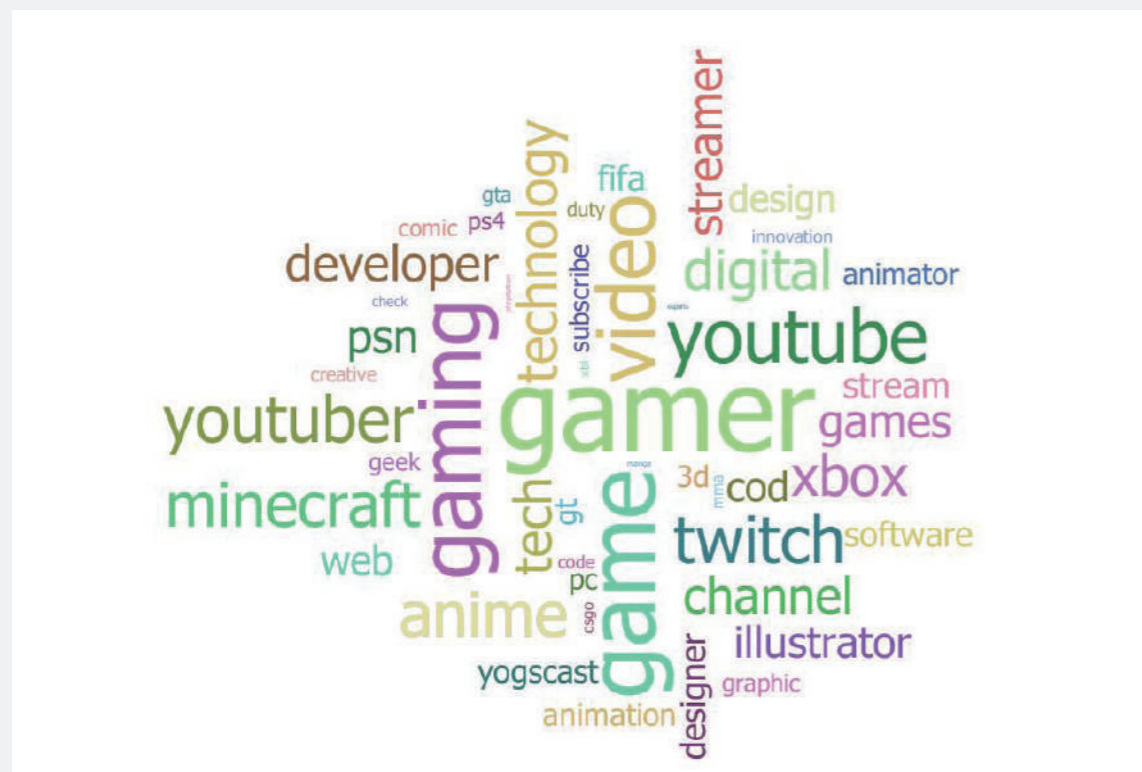
Unlike social listening, this new approach goes beyond the mere (and skewed) 5% who actually produce content on social media, allowing brands unprecedented insight into the remaining, passive consumers – those who listen and watch, indicating their tastes by liking and following. We don't just tell you what people think of you; we also tell you why.

Mindset wordclouds: Customers self-describe

Starcount's wordclouds illustrate how particular consumer groups self-describe online. They give a unique insight into the mindsets of consumers in their own words.

Gamers

News Junkies



This group are passionate gamers; they will give games of any genre a go, from Minecraft to Call of Duty, and spend hours on YouTube both watching content created by their favourite gamers and uploading videos themselves. Outside of the gaming world, they love to read and watch comic books, Manga and animation. They are self-identified geeks, obsessed with the latest technological innovations and often working as developers, animators or software designers themselves.

The News Junkies mindset has a strongly outward focus. This group are hungry for knowledge and are active participants in the world around them, particularly when it comes to local, national and global politics. They read a wide range of newspapers and always have one eye on their Twitter feeds so they can be the first to hear about breaking stories. They aren't afraid to stand up for what they believe in, supporting charities and campaigning for their favourite causes.

Sports Fanatics



Football is the Sports Fanatics’ ultimate passion - they love to watch it, play it with their friends and kids, and talk about it, both face to face and online. When they’re not engaged with ‘the beautiful game’, they enjoy cricket, rugby, boxing, cycling and going for a run.

Get to know your customers: Who are the mindsets?

Gamers:

The Gamers mindset is 73.5% male and over-indexes in the 18-24 mindset. At 28.7% of the ‘Many faces of entertainment’ audience, this is the smallest segment of the five, but is growing at a rate of over 30%, with a UK equivalent of over 14.5m people. This mindset is influenced by a range of brands and influencers, with media titles and websites also coming into play.

Gaming brands and influencers dominate their top stars; Rockstar Games heads up the list, with PlayStation and Xbox also within the top five. Their key gaming influencers are members of gaming group, the Sidemen, including Wroetoshaw (Harry Lewis), Miniminter (Simon Minter), TBJZL (Tobit Brown), Vikkstar123 (Vikram Barn), Behzinga (Ethan Payne) and Zerkaa (Josh Zerker), all of whom generally post FIFA videos.

As well as Gaming, this group are passionate about Technology, Computing & Software and Phones & Communication, keeping up with the latest innovations via TechCrunch, Wired, Guardian Tech and BBC Technology. Other, wider ranging passions include UFC & Martial Arts and Animation & Cartoons (headed up by Disney’s Pixar), while their fastest growing passion is, surprisingly, Pets & Animals, driven by the enjoyment they get from looking at cute animal videos online!

News Junkies:

The News Junkies over-index in the 25-34 age bracket and are 63.9% male, within an interest in creating online content, as well as reading and sharing it. Their top stars are largely split between influencers and media titles, but they also have an interest in organisations. Brands, however, are notably unimportant to this mindset.

International media outlets make up the majority of the top stars for this group, with BBC News, The Economist, Reuters, The Guardian and The New York Times amongst their most-read publications. They also have an interest in educating themselves across a range of subjects; National Geographic and Lonely Planet are their go-to travel titles, they rely on Time Out and London’s Evening Standard for cultural and restaurant recommendations, tune into the football on Sky, stay up to date on scientific innovations with the New Scientist and rely on The Guardian supplements to broaden their horizons.

Pets & Animals is their fastest growing passion, with their favourite organisations displaying a growing love of birds – they support charities including the RSPB and The British Trust for Ornithology (BTO).

Primetime Petrolheads:

This group massively over-indexes in the 25-34 age bracket and, at 56.7% male, is the segment that's the closest to being evenly split between men and women. This group prefer to silently consume content rather than create or share it and over 90% of their top stars are brands.

The hosts of The Grand Tour (ex-Top Gear), James May, Jeremy Clarkson and Richard Hammond, are the most popular stars with this mindset, with Jonathan Ross breaking up the trio to snag third place on the list. Comedy is a key passion for the Primetime Petrolheads, especially popular TV stars such as Jimmy Carr, James Corden, John Bishop, Alan Carr and Rob Brydon. This Morning host, Phillip Schofield, is also a favourite with this group. Along with Top Gear and The Grand Tour, they like to watch entertainment shows such as Celebrity Juice, The Last Leg, Strictly Come Dancing and the Graham Norton Show.

Formula One is the third most important passion for this group, but Snooker, Cricket and Tennis are all growing quickly, showing an increasing interest in a range of live sport.



Reality TV Lovers:

The Reality TV Lovers are likely to be 18-years-old and under, and are the only segment to be comprised of majority females (over 66%). Influencers make up 94% of their top stars and this group have ambitions to be social media stars themselves, regularly creating and sharing content.

Reality and primetime TV shows are very popular with this group, with favourites including Geordie Shore, The Only Way is Essex, The X Factor, Big Brother and Love Island. The stars and presenters of these shows hold significant influence over the Reality TV Lovers, from Geordie Shore star Charlotte Crosby to X Factor judges Simon Cowell and Cheryl. The Kardashians are also prominent for this group, with Kim, Khloe and Kourtney appearing above sisters Kylie and Kendall Jenner.

The Reality TV Lovers rely on their favourite TV stars, pop singers, models and social media stars for fashion and beauty tips, and are particularly influenced in this area by Victoria Beckham, Cara Delevingne and vlogger Niomi Smart. Pets & Animals, Cooking and LGBT are amongst their fastest growing passions.

Sports Fanatics:

The Sports Fanatics mindset over-indexes in the 18-24 age bracket and is 69% male, with minimal interest in creating their own content, instead preferring to discuss their entertainment preferences with their friends offline. Influencers make up over 83% of their top stars, with media titles and websites also being important to this group.

Football is the dominant passion for this group, with their favourite players, pundits, team, shows and channels all making an appearance in their top stars. However, this group don't limit their sports viewing to football alone; other favourite sporting stars include boxer Anthony Joshua, tennis star Andy Murray and sprinter Usain Bolt. Comedy is also a key passion for this audience and they love to watch Jack Whitehall and Freddie Flintoff on A League of their Own.

This group's love of sport means that they are always open to trying new outdoor activities from around the world; their fastest growing passions are Surfing, Athletics, American Football and Australian Rules Football.

Changing passions, mindsets and motivations: the effect on brand loyalty

Consumers' passions, motivations and mindsets change over time, influenced by lifestages, technological developments and social transformations. By tracking these shifting mindsets using unique, timestamped data, we can understand how, when and why consumers have decided to engage with particular brands, influencers and media titles, monitor emerging trends and competitors, and predict future behaviour and intent.

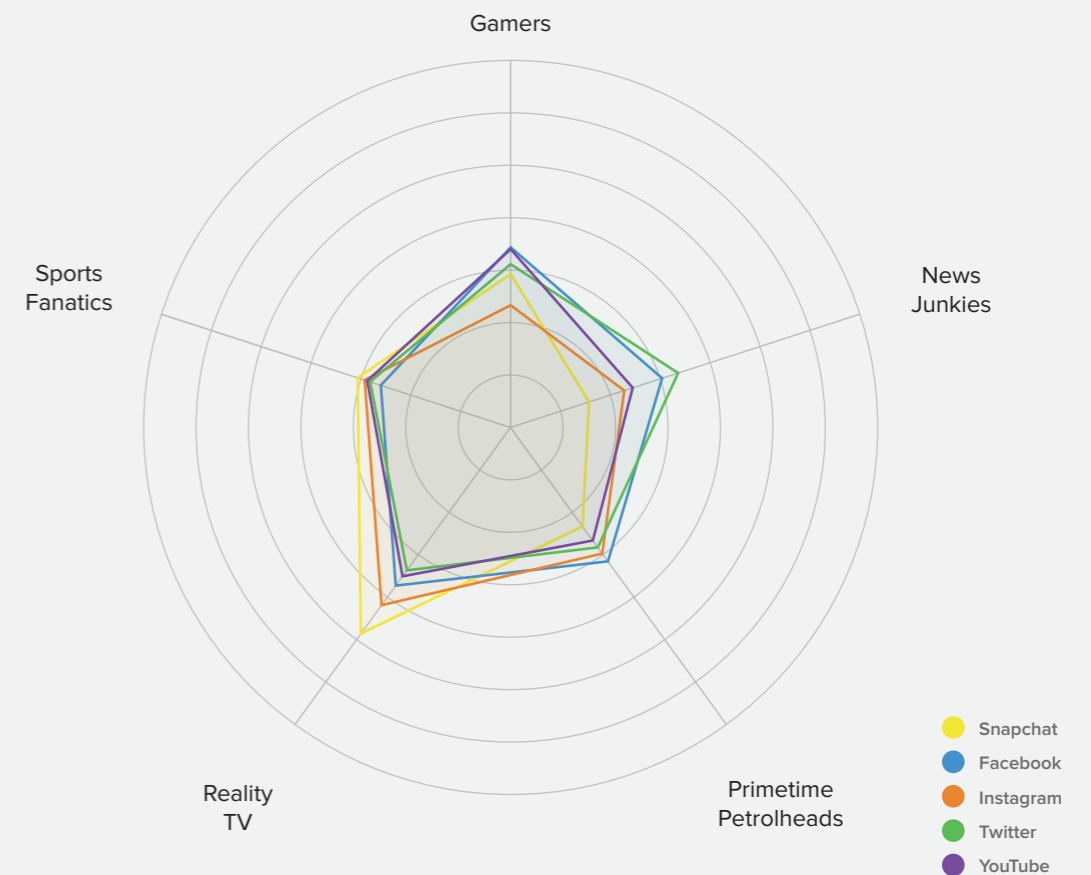
This enhanced insight also allows brands to track customer journey, see who is in their consideration set and intercept consumers at the right moment, using the appropriate messaging and channels.

Brand Positioning

How well are you speaking to your customers?

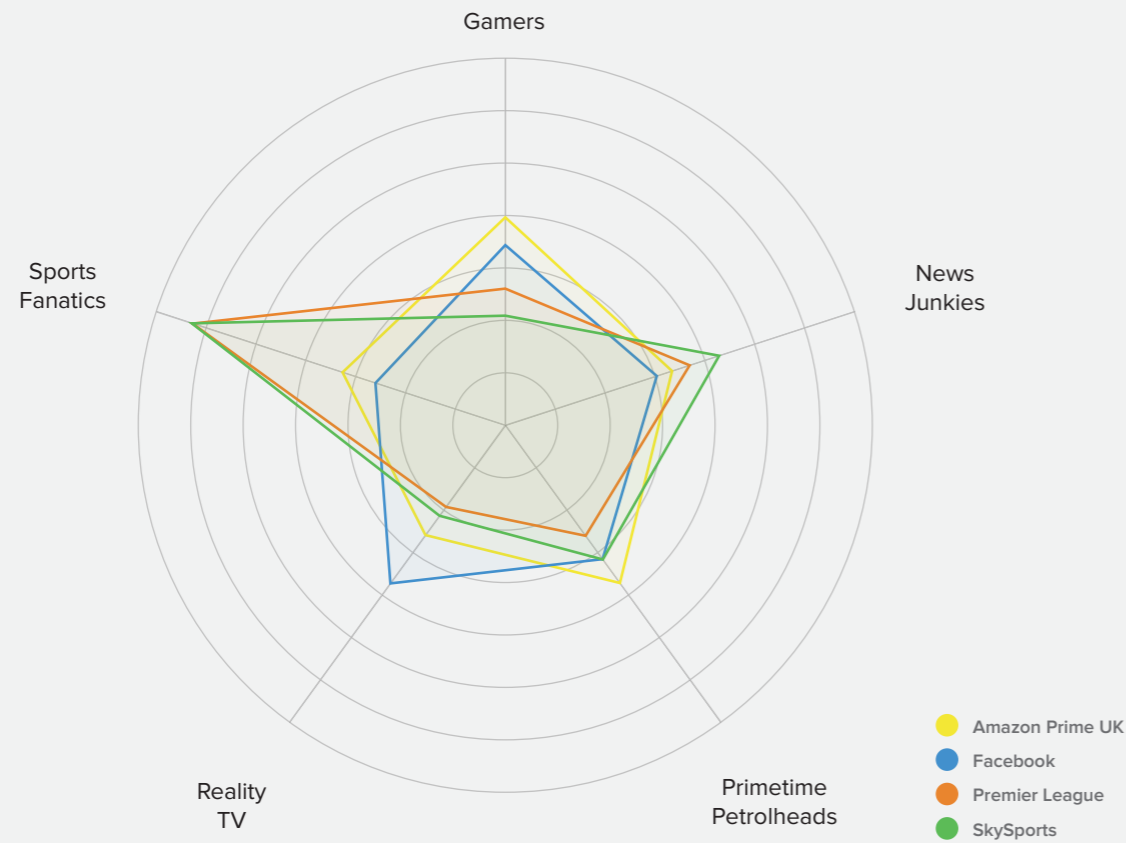
This enhanced data and segmentation can help brands to optimise their strategy by identifying how their market share differs to their competitors' across segments.

Social media channels



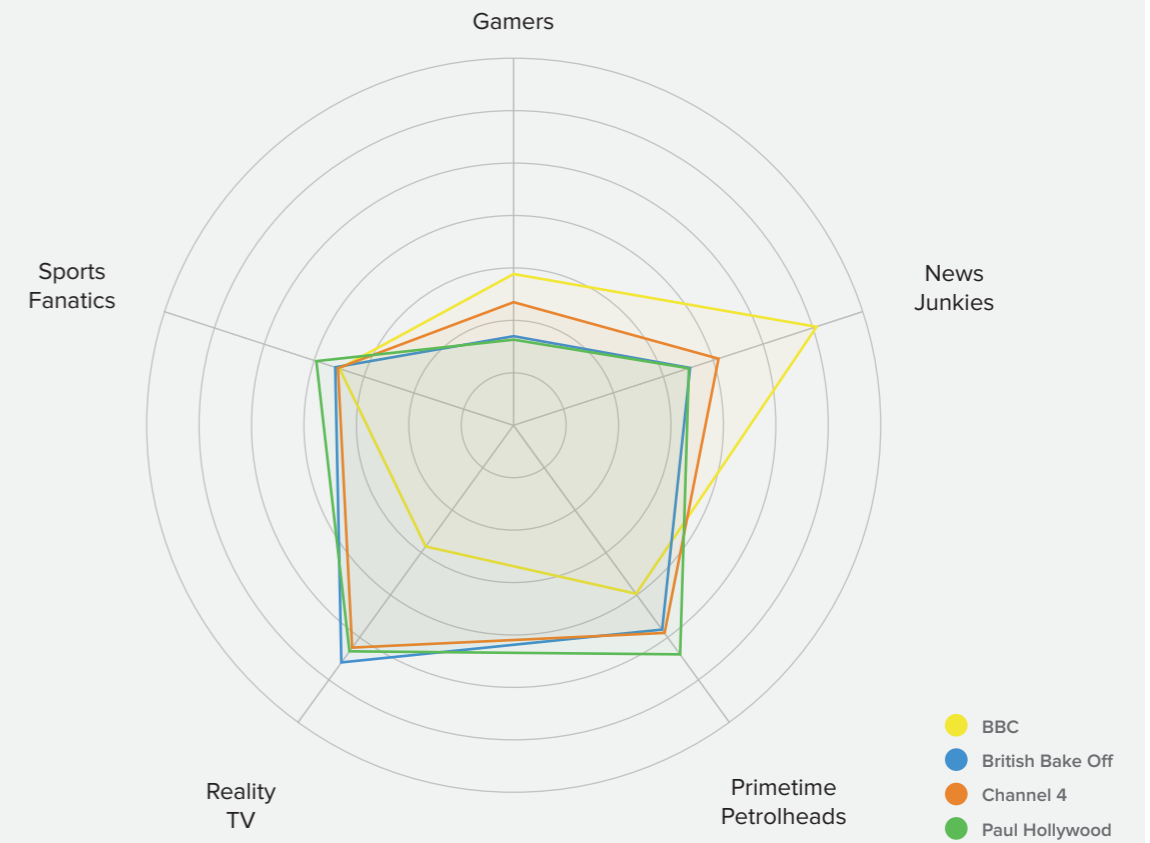
While each of the social media channels listed above have made moves towards the entertainment space in one form or another, the degree to which these platforms resonate with different mindsets reveals how each of the mindsets feel most comfortable consuming and sharing content. News Junkies prefer primarily word-based platforms Twitter and Facebook, while Gamers spend most of their time on YouTube. Image-based platforms Snapchat and Instagram are most popular with Reality TV Junkies, while Sports Fanatics and Primetime Petrolheads show no particular preference, dipping in and out of each at their leisure.

Premier League



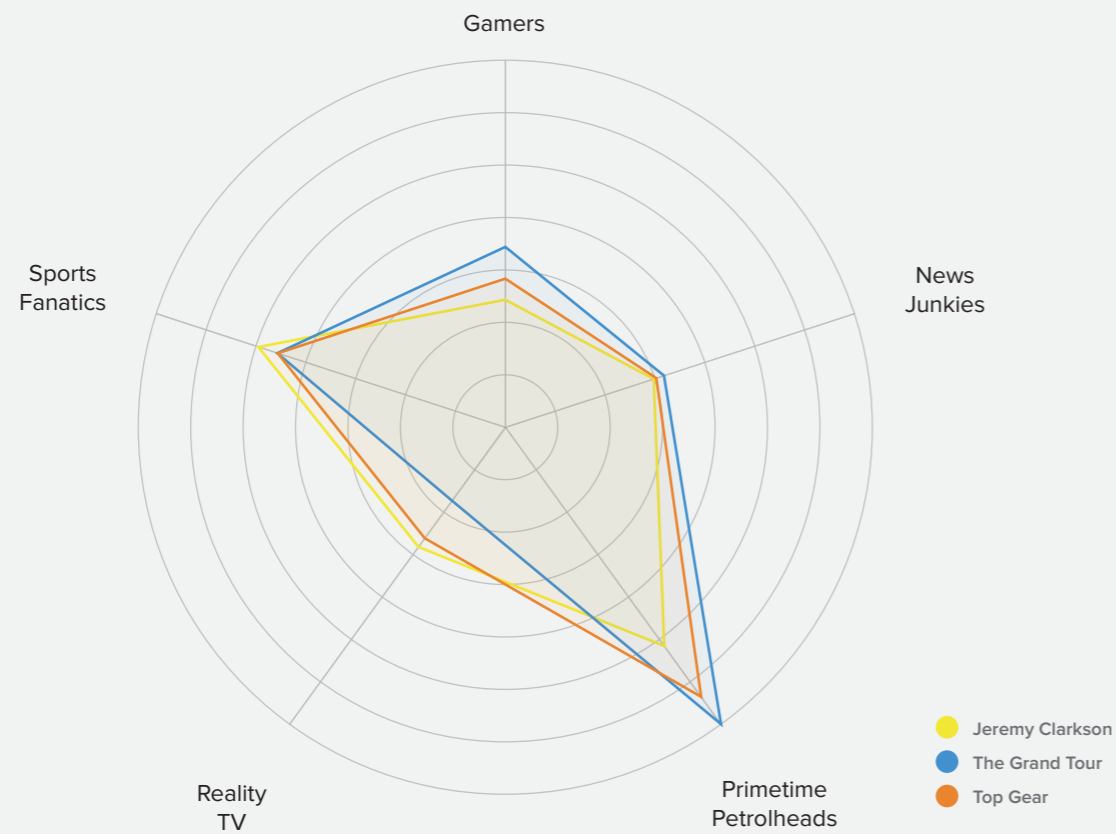
The rights to broadcast the English Premier League will become available this year, with tech titans Facebook and Amazon expected to join traditional broadcasters in the bidding war. But how will football fans feel about viewing matches online? The radial chart shows that the Premier League and Sky Sports speak to very similar audiences, resonating highly with Sports Fanatics, with a small spike into News Junkies and Primetime Petrolheads. Amazon Prime UK and Facebook, however, have very little crossover with the Premier League fans, speaking much better to Gamers and Reality TV Lovers. If either digital platform acquires the rights to the tournament, they may have to work hard to persuade Sports Fanatics to transfer their loyalties, but, if successful, the tech brands stand to gain a large new audience.

The Great British Bake Off



Channel 4's acquisition of The Great British Bake Off from the BBC was one of the biggest entertainment headlines of 2016 – but how suitable is each channel as a platform for the show? Unsurprisingly, the BBC resonates most strongly with News Junkies; Channel 4 and Bake Off, on the other hand, speak to very similar mindsets, with spikes into Primetime Petrolheads and Reality TV Lovers. When we add Paul Hollywood to the mix, the presenter forms an almost identical shape on the chart to the British Bake Off, reflecting how viewers associate him distinctly with the show. The similarity between the shapes formed by the Bake Off, Hollywood and Channel 4 (and the contrast of all three to the BBC's shape on the chart) indicates that the show will continue to thrive in its new home, perhaps reaching new audiences for whom it is better suited than those who are loyal to the BBC.

Top Gear

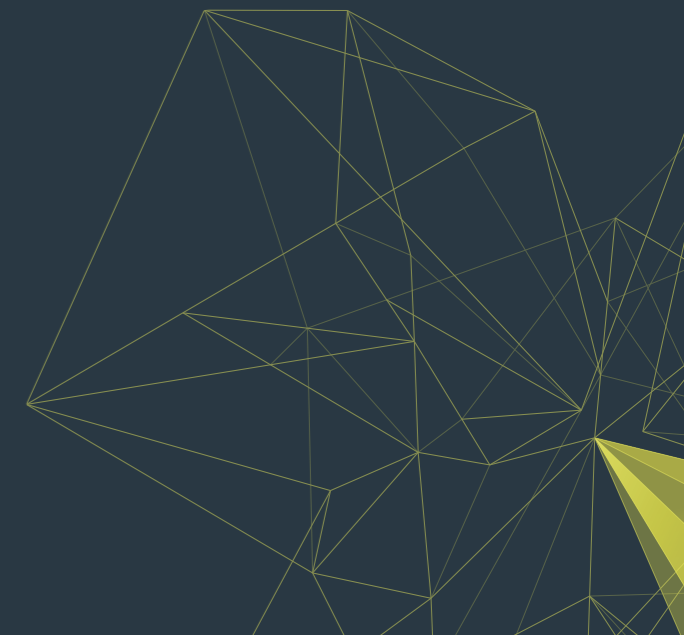


Another scandal that rocked the TV world was the dismissal of Jeremy Clarkson and the subsequent migration of the long-standing Top Gear hosts to Amazon Prime, where they launched a rival show, The Grand Tour. Clarkson speaks most strongly to Primetime Petrolheads and Sports Fanatics, a pattern mimicked by both Top Gear and The Grand Tour. The Grand Tour has a slightly stronger spike into the Primetime Petrolheads than Top Gear, indicating that this group's loyalty to the original hosts, Clarkson, Richard Hammond and James May, is stronger than their loyalty to any single channel, compelling them to follow the trio to Amazon.

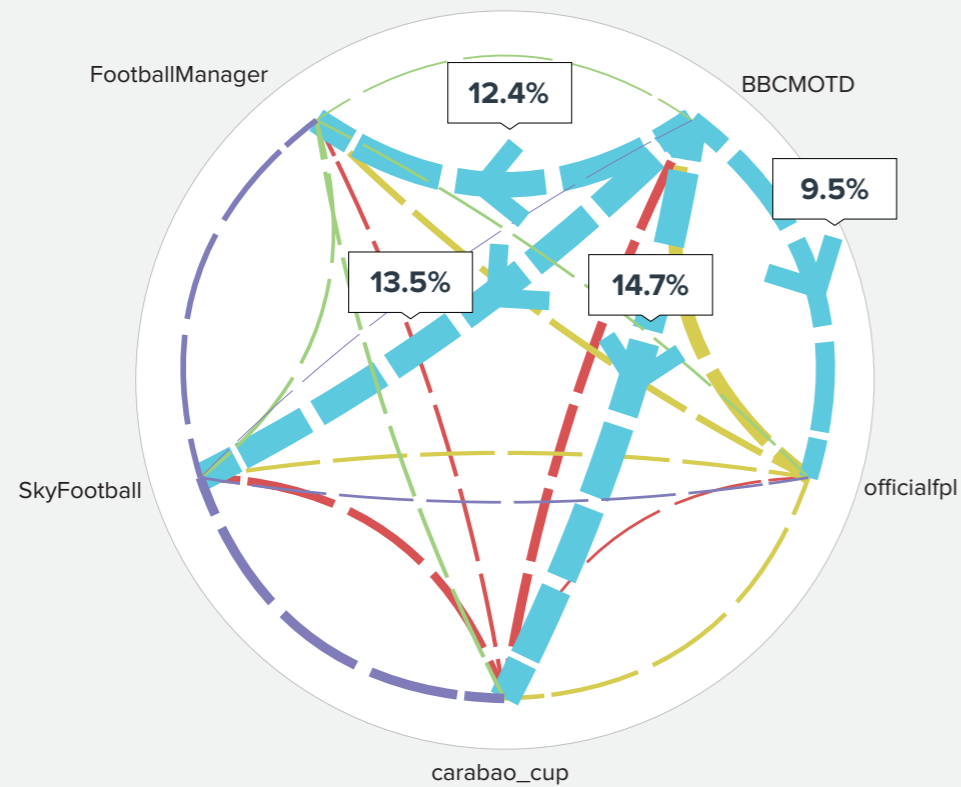
Tracking changing customer loyalty: How can your brand become a market leader?

When it comes to customer loyalty, there's only one certainty: customers will move their purchases to whichever brands best understand them and serve their needs. What's more, their desires and expectations are constantly evolving – to stay relevant, you have to keep up.

Starcourt's timestamped data allows you to track the flow of fans from brand to brand, illustrating when and how customer loyalty changes over time, and why customers move from a particular brand to its competitors.

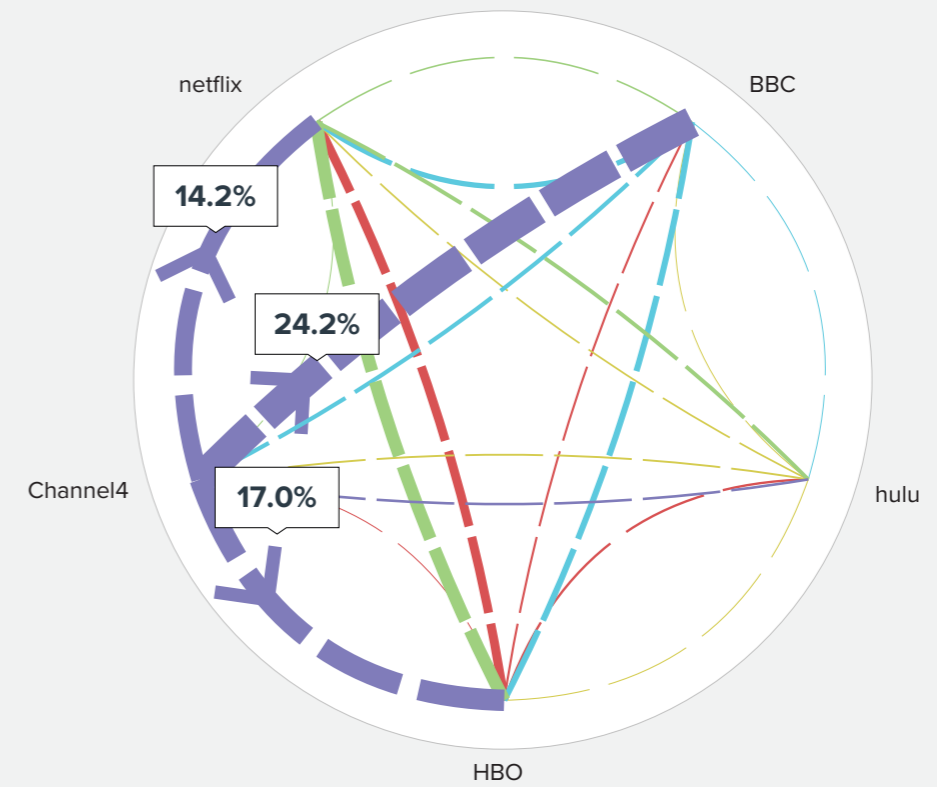


Football fans



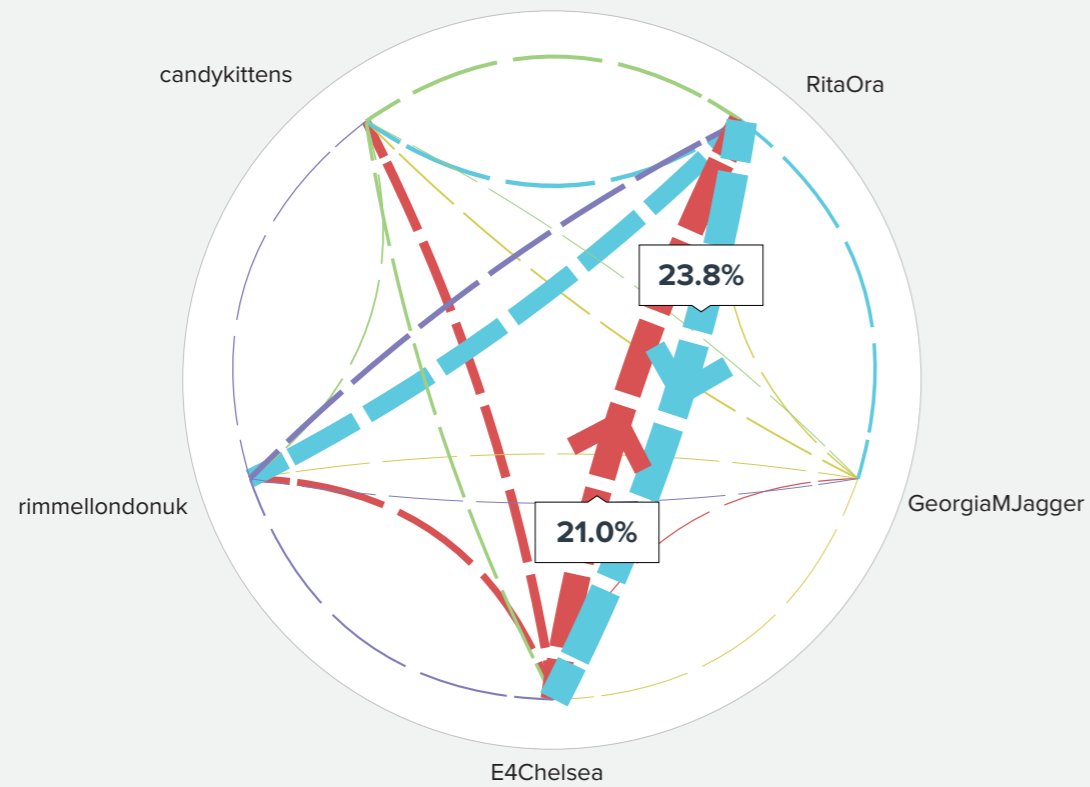
The flow between different types of football-themed content demonstrates the rise of gamification within live sport. Until mid-2016, Match of the Day acted as the main catalyst for casual football fans to become interested in more intense analysis, with MOTD viewers moving consistently towards Sky Football and the Carabao Cup, as well as expressing their growing interest in the sport by playing games like Football Manager. Over the last year, however, this pattern has shifted. The Fantasy Premier League game has become the gateway for emerging football fans, with a particularly strong flow towards Match of the Day (over 14% of viewers across the market since the start of 2017), as well as to other football content. This may be due to the nature of the game, which rewards users who are well-informed about the latest football news, thus driving them towards a broader range of related channels and sources.

Streaming services



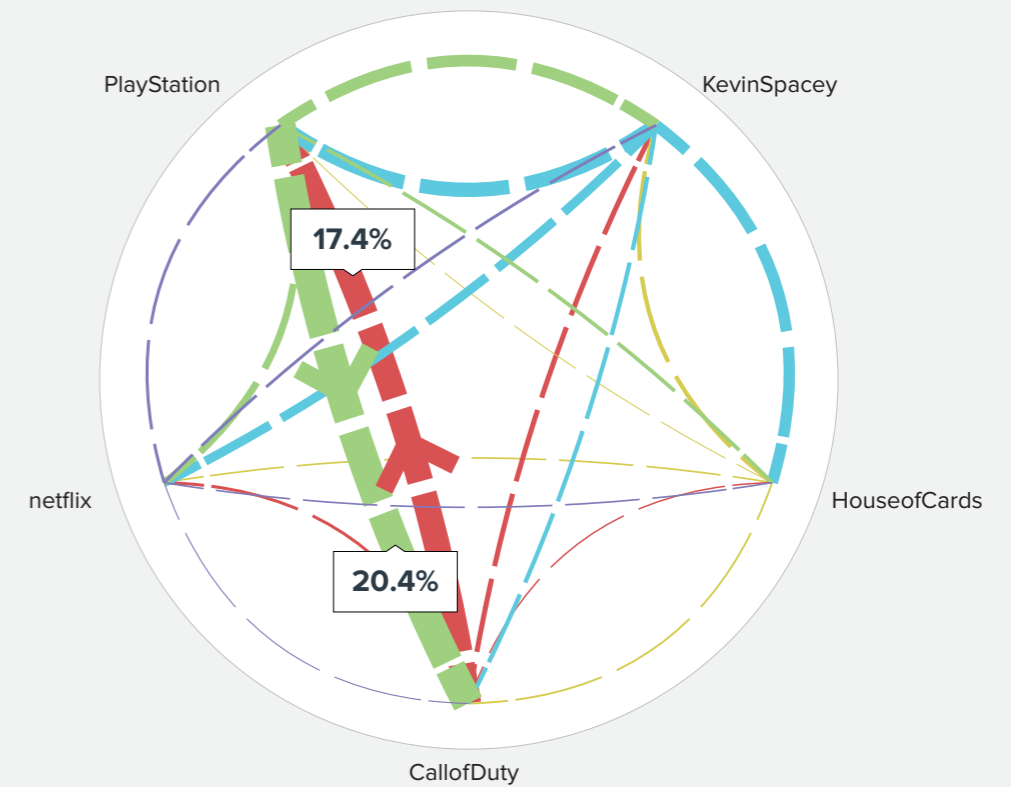
Since the start of 2014, Channel 4 audiences have been flowing steadily towards Netflix, the BBC and HBO, indicating the lack of patience shown towards adverts by modern viewers. Netflix audiences have increasingly begun to move towards HBO, with over 15% of the market moving in 2017, indicating that HBO's appeal has been boosted by high-quality, original content with strong word-of-mouth such as Big Little Lies and Game of Thrones. Despite not being available in the UK, hits including The Handmaid's Tale have increased the buzz around hulu, with the flow of audiences from Netflix growing over the past two months. Bolstered by a string of Emmy wins, is now the optimum time for hulu to enter the UK market?

Made in Chelsea



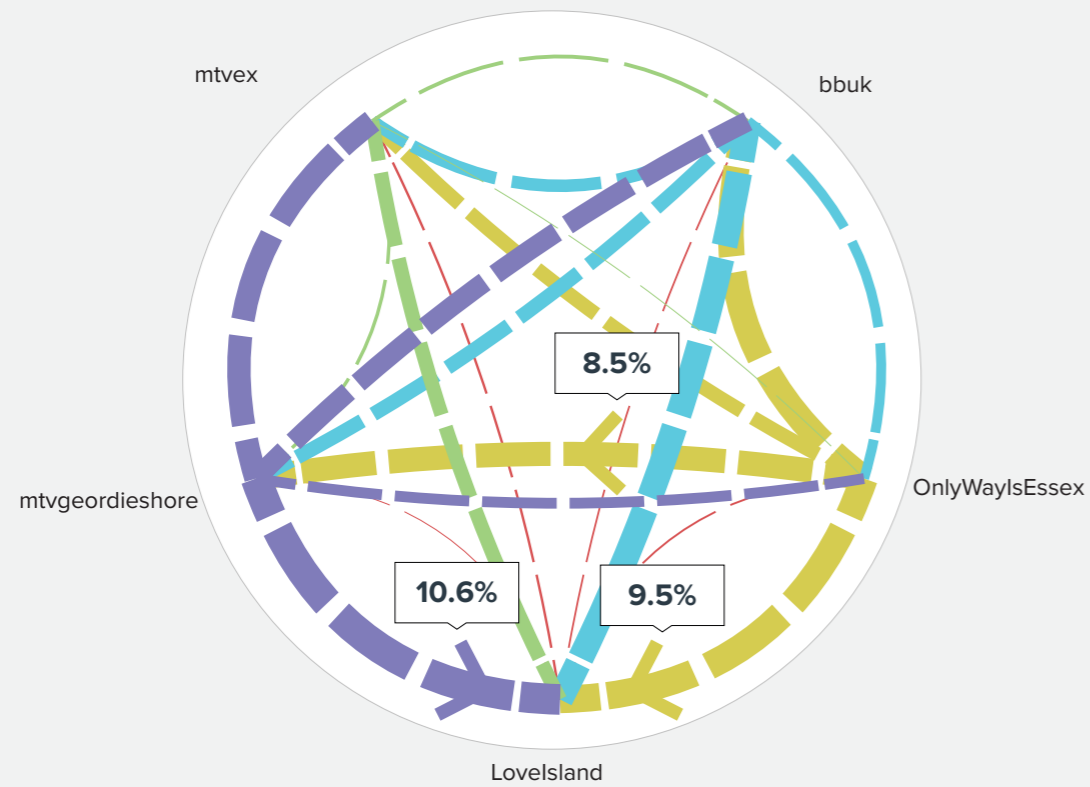
Rimmel has long been the sponsor of Made in Chelsea; the partnership seems a perfect fit, with the brand and show attracting a similar demographic. However, the flow chart above reveals that it's not Rimmel itself, but the face of the brand, Rita Ora, who has impacted most on the collaboration with the Channel 4 show. Since the start of 2016, almost 18% of the audience have moved from Made in Chelsea to be interested in Rita Ora, while 23% of Ora's fans have discovered the show through the singer's association with it. Similarly, Ora's Rimmel campaigns have encouraged almost 18% of the audience to try the beauty brand. On the other hand, only 6% of the market have moved directly from Made in Chelsea to Rimmel since the start of 2016. Meanwhile, another Rimmel ambassador, Georgia May Jagger, has had almost no impact on the brand's reputation with young TV fans, while Made in Chelsea star Jamie Laing's brand, Candy Kitten, only managed to acquire 5.6% of the audience in two years.

Kevin Spacey



Kevin Spacey is one of Hollywood's most sought after actors, lending his talent to films, TV and even a game. Spacey was selected to lead one of Netflix's first original dramas, House of Cards, after an algorithm recommended him as popular with their target audience and in 2014 he was cast in the latest incarnation of hit game Call of Duty. But what was the knock-on effect of Spacey's high-profile casting? While there has been a steady flow of Spacey fans discovering both Netflix and PlayStation through their love of the actor, PlayStation slightly have the edge over the streaming service; since the start of 2015, just over 6% of Spacey fans have moved towards Netflix and almost 8% towards House of Cards. 10% have become interested in PlayStation, however, implying that Spacey's involvement in a high-profile game inspired some of his fans to explore a new entertainment medium.

Love Island



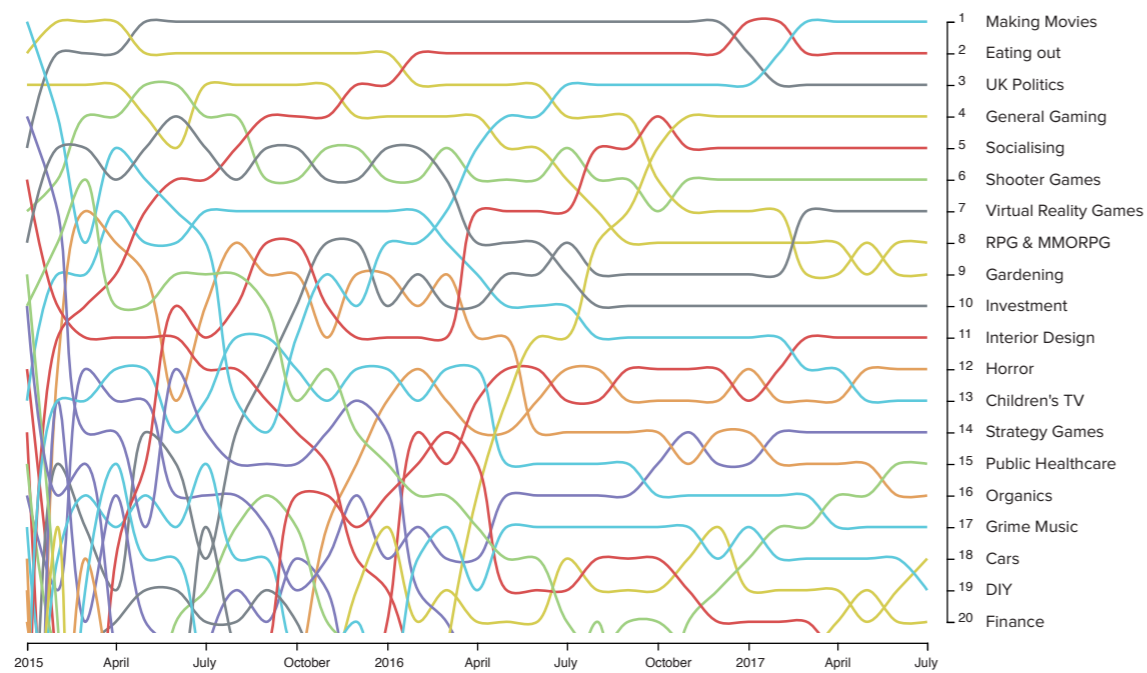
Love Island was the TV smash hit of the summer, with audiences all over the UK tuning in every night and sharing their thoughts on social media. The flow chart confirms this; looking at summer 2017, the show attracted huge audiences from The Only Way is Essex, Big Brother, Ex on the Beach and Geordie Shore, with the latter having the biggest movement at almost 30% of the market. In fact, Love Island so dominated the reality TV market during this period that there is almost no movement in any other direction.

Staying on top of trends

Because social intelligence provides a gateway to people's passions, motivations and mindsets, we can use it to identify emerging communities and trends. This means it's not only possible to keep pace with changing consumer demand, but also to predict when and why their loyalties will shift.

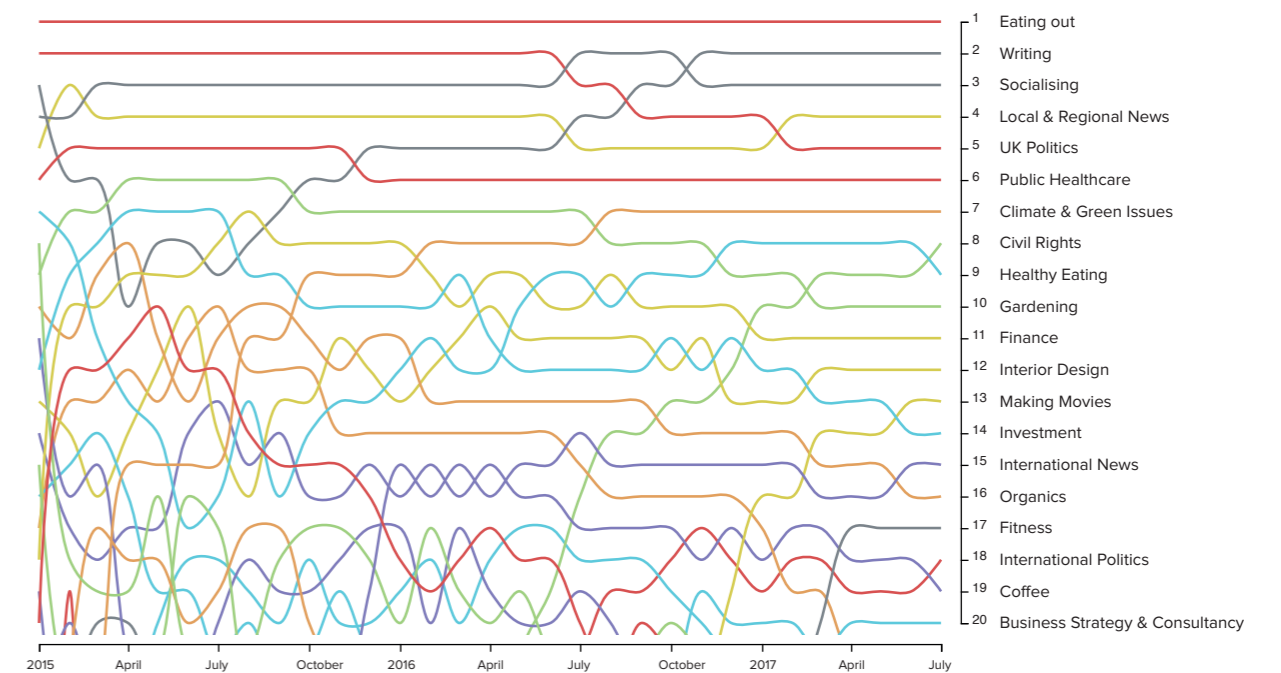
Gamers:

Gamers are influenced by changing trends across the entertainment industry, from games and films to TV and music. As well as playing a range of games in different genres, they are fascinated by the process of creating content ('Making Movies'), influenced by gaming writers and producers such as Dan Maher and directing icon Luc Besson (sci-fi and horror are their favourite film genres). UK Politics has remained amongst their top passions since 2015 and they love following the antics of controversial figures and organisations such as Nigel Farage and the Pirate Party. Although Gardening has fallen from 2nd to 9th place it remains an important passion and this, coupled with the steep rise of Interior Design to 11th place, indicates that this group are beginning to move out of their family homes and decorate their own spaces.



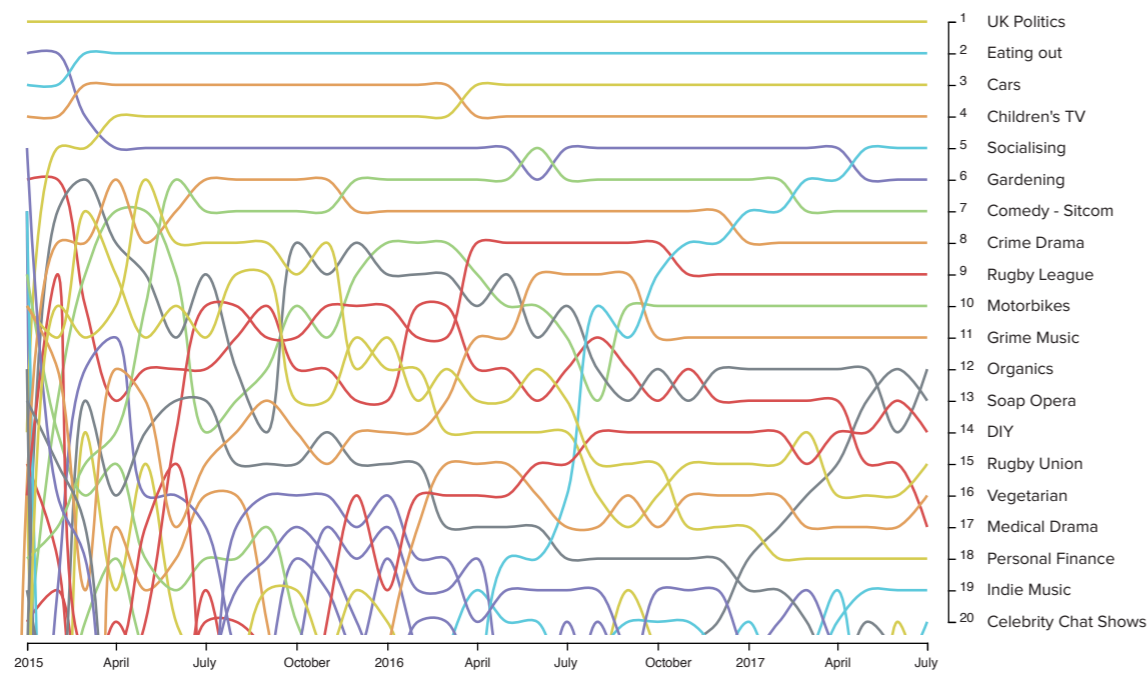
News Junkies:

While News Junkies' top passions have remained consistent since the start of 2015, they have explored a range of other interests over that time period. Eating Out is a key passion for this group and they rely on food critics such as Jay Rayner to recommend trendy restaurants and pop-ups in London and the surrounding area. They are influenced by successful, non-fiction writers such as economist Paul Krugman and comedy writer Danny Baker, and love publishing their own pieces on Medium. This group care deeply about the world around them and want to stay up to date with local and international news across civil rights, healthcare and climate change (with civil rights in particular becoming increasingly important to them in the past year).



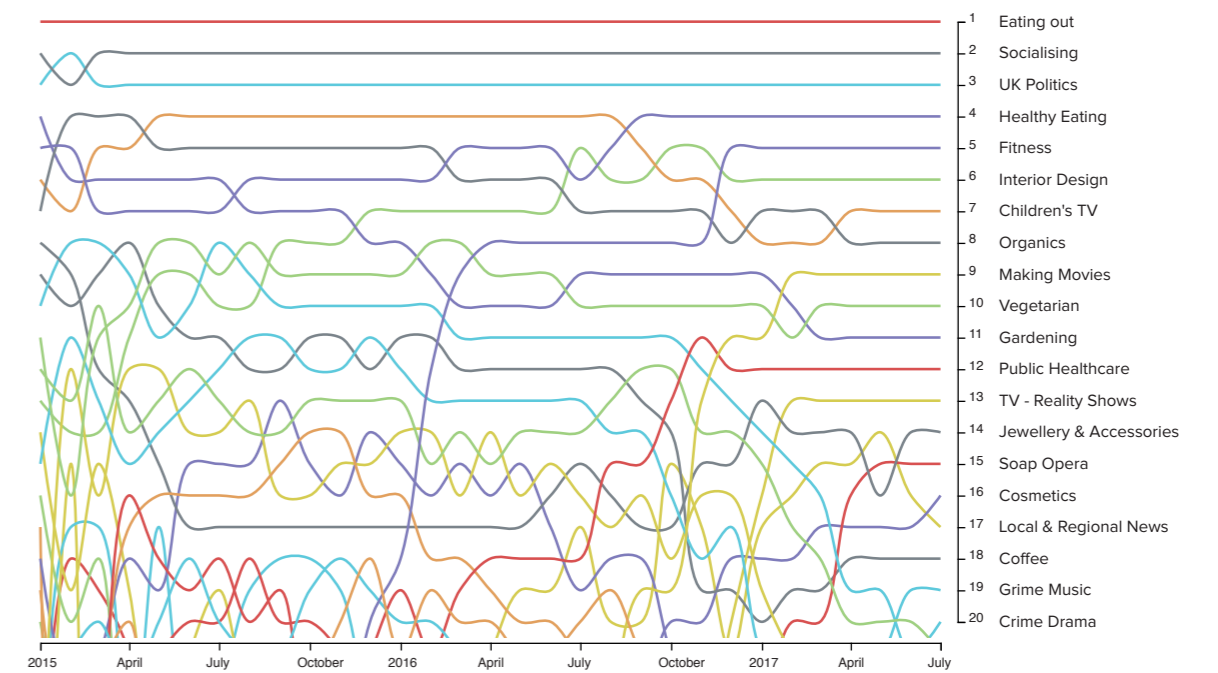
Primesime Petrolheads:

The Primesime Petrolheads have some key, unwavering passions, as well as other interests that span entertainment, motoring, sport and food. They are always up to date on the world of UK Politics and are fans of ex-Prime Minister David Cameron. Eating Out is also a top passion for this group and they are attracted to affordable, reliable chains such as Nando's and Pizza Express, as well as favouring their local Wetherspoon's for a night out. When it comes to TV entertainment, this group will give most genres a go, watching everything from children's TV with their kids to the latest crime drama. They have also begun to be more health-conscious in the last year, exploring the idea of vegetarianism and endeavouring to buy sustainable, organic produce.



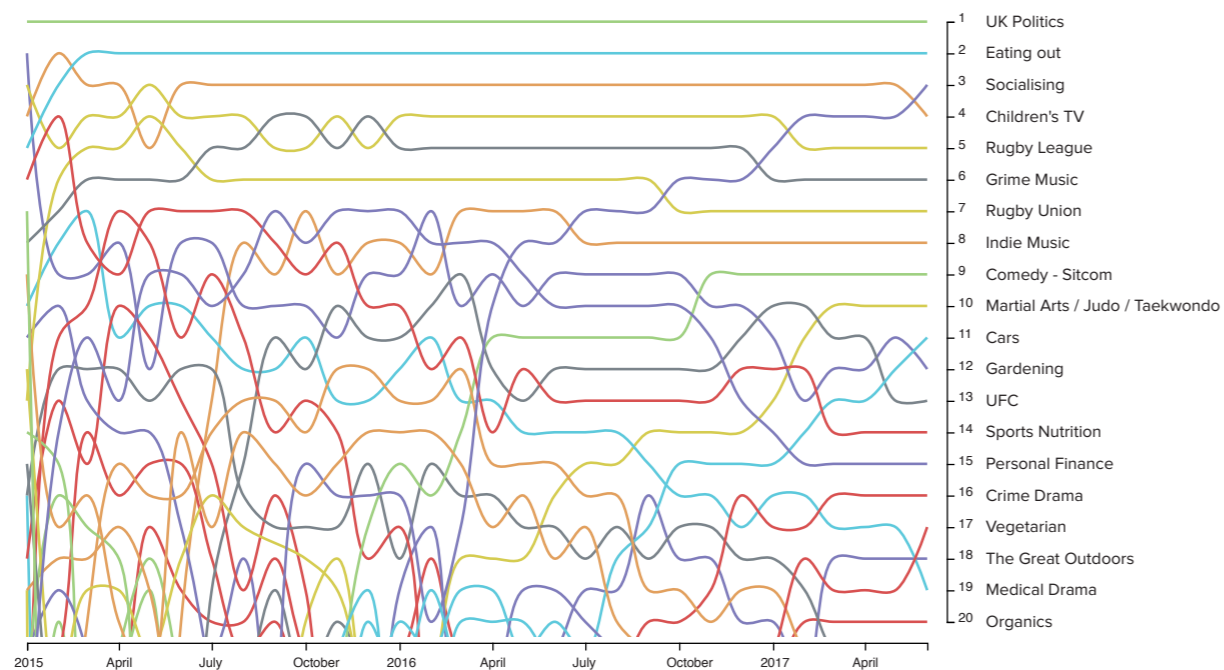
Reality TV Lovers:

While their passion for Eating Out, Socialising and UK Politics has remained stable since the start of 2015, Reality TV Lovers have experienced some distinct changes in their key interests over the last two years. They have started to take better care of themselves, with Fitness jumping into 5th place (driven by social media stars such as 'Results with Lucy') and Healthy Eating into 4th (with brands such as Slimming World, Fit Tea and Nutri Bullet helping them keep up with a healthier regime). Organics, however, has fallen slightly down their list of priorities; although they still love brands like Neal's Yard Remedies and Organic Surge, they are spending their money increasingly on decorating their homes and going out with friends, rather than high-end, natural products.



Sports Fanatics:

Sports Fanatics have a sustained interest in UK Politics, preferring to get their information directly from bold insiders such as Alastair Campbell and John Prescott. Socialising has risen dramatically since 2016 to be the 3rd most important passion for this group - they love mixing with other football fans to discuss recent matches and transfer rumours, both in person and online. They are also fans of Rugby Union and have a growing interest in Martial Arts. Like many of the other mindsets, they have a sustained interest in Eating Out, but this group love to visit trendy locations like Look Mum No Hands!, a London-based chain of cycle cafes that appeals to a sportier crowd.



What's next?

Customer data, enhanced by social intelligence, has significant power which can be used to retain your most valuable customers, as well as to attract new ones.



ADVERTISING

- Optimise marketing messages
- Customise content recommendations
- Identify key influencers



PLATFORM

- Inform cross-platform decisions
- Support new commercial models
- Drive more effective targeting



AUDIENCE

- Enhance prospecting activities
- Strengthen retention and engagement
- Detect predictive indicators and act
- Understand competition and positioning



PARTNERSHIPS

- Identify brand partnerships
- Attract new advertisers
- Support dynamic targeting initiatives



CONTENT

- Supports content acquisitions and commissions
- Deliver high value content and increase revenues
- Tailor content packages
- Regular review of programme formats



Conclusion: What are Starcount's recommendations and solutions?

Loyalty, in the traditional sense, has become an increasingly elusive concept for the entertainment industry. Whether they're a football-crazy Sports Fanatic who happily forks out for the full Sky Sports package or a socially-conscious News Junkie who always has one eye on their Twitter feed, modern consumers will switch between shows, channels and platforms to find the best and most relevant content.

To survive in today's disruptive digital landscape, broadcasters need to make decisions grounded in a wealth of reliable data. However, knowing consumers' demographic and historic viewing habits is no longer enough. Although data collected through sources such as BARB, as well as directly from audiences, is useful for customer understanding, this data alone can't provide the breadth of perspective necessary to really get to grips with your place in a complex market. To develop relevant communications and content, reach the right audiences through the right channels and forge emotional connections with viewers, you need to complement existing insight with new sources of digital intelligence, like Starcount's Observatory.

What's more, entertainment brands and broadcasters must create a culture of risk-taking and innovation if they are to thrive and compete with the data-rich tech titans who have their sights set on media dominance.

Emotional loyalty is important for any industry, but particularly so for the world of entertainment. Every individual is inspired, influenced and motivated by a vast range of internal and external factors and each has high expectations of the content they consume and the brands with which they engage. It's by getting to know these trigger-events and influences, and meeting these expectations and "need states", rather than by investing in flashy technological innovations, that brands will differentiate themselves as market leaders and showcase their true staying power.

About the author



Dr. Clive Humby
Chief Data Scientist

Clive has nearly 40 years' experience in Customer Analytics across 30 markets globally. From creating the first geodemographic system, ACORN, in the 1980s, to developing the use of motivational segmentation in his current role at Starcount, Clive is acknowledged as one of the world's pioneers in the discipline.

With his business partner, Edwina Dunn, he founded global consumer insights businesses, dunnhumby, which revolutionised the use of transaction data for the FMCG industry, before expanding to work with a wide range of consumer-facing businesses, from banking and telecommunications to department stores and online retailers.

He was first to coin the phrase "Data is the New Oil" and is consulted at all levels, from government on the implication of Data Science in the UK Economy through to individual clients where he leads key work streams designed to step change their businesses.

He has elected honorary Fellowships at the Institute for Direct Marketing, the Market Research Society and the Institute of Mathematics and its Applications, and was made a Patron of the Market Research Society in 2013 and Companion of the Operational Research Society in 2014. He has an Honorary Doctorate of Engineering from Sheffield University.

The data team





About Starcount

Starcount helps you to understand customers more than ever before by driving greater value from your customer data, and providing an additional enriched lens of insight into customer loyalty. We believe that knowing the customer better than anyone else helps to create a new customer-centric business culture – a focus on relevant and timely customer service and engagement.

Led by the transformational data pioneers, Edwina Dunn & Clive Humby, Starcount has a rich heritage of exploring and capturing current and fast moving data around customer loyalty.

We are not just data scientists and software engineers, but experienced customer storytellers.

Combining a wealth of customer insight with new era digital and social intelligence, we uncover consumers' wider motivations, mindsets and aspirations. This allows us to help you forge deeper emotional connections by reconsidering business strategy, capturing consumers at the perfect moment and nurturing brand love. We can help you find a true and sustainable competitive edge.

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