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Business analysis for over-the-top video participants

In Focus:

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In this issue:

Lights, camera, hashtag: Social TV takes shape

Issue: Television's integration with the burgeoning social media category presents business opportunities across the television ecosystem, touching content producers, television networks, research providers, advertisers, video distributors and social Internet platforms themselves.

Background: A vast proliferation of social media chatter about television programs and topics has inspired a variety of new business models as industry participants attempt to leverage the digital conversation into perceptive new research insights, program promotion opportunities and enhanced viewing experiences.

Implications: Television industry participants are finding a lot to like in social media, which offers ready-made solutions to some of the challenges that have long vexed the interactive television category. Coupled with the rise of smartphones and tablet computers, social media creates large-scale interactive conversations around television that can be leveraged to support program promotion and discovery, research insights and advertising inventory extensions. Although there's no immediate revenue windfall in sight, there are significant strategic possibilities around the combination of television and social media that make the social TV category a compelling new arrival.

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Introduction: Television's social legacy

Since its inception, television has exhibited a social dimension. The medium's early evolution was rooted in social viewing, with families frequently coming together to watch programs live as they were broadcast. Testifying to the communal nature of early-era TV viewing was the fact that television sets typically were stationed in rooms where multiple household members tended to gather.

Even today, in an era of increasingly personalized media, social gatherings around certain television events remain notable — the Super Bowl being the shining example. More common are everyday social interactions around television. From water-cooler conversations about "American Idol" results to casual conversations about favorite actors and programs, the national dialogue is filled with television references. Clearly, people enjoy talking and sharing observations about television and always have.

Television's role in the modern social-digital firmament also is well established, with TV-related topics among the most prevalent within popular social media platforms Twitter and Facebook. More than 15 million people have "liked" the Facebook page devoted to Fox's musical serial "Glee," and the official Twitter feed associated with TV personality Oprah Winfrey now counts 6.9 million followers. During July 2011, more than 380,000 fans of the HBO serial "True Blood" posted "check-in" messages on social TV sites, indicating they were watching. In the case of AMC's popular drama "Mad Men," so many fans adopted virtual Twitter personas to post messages in the voice of the show's characters that AMC (temporarily, as it turned out) demanded that Twitter halt the unauthorized musings. Television is a large enough part of the digital conversation that a budding market-research category now mines millions of digital conversations about television to create new metrics and perspectives into television viewing habits at large. A business information website, lostremote.com, is devoted strictly to the social television business.

As those examples indicate, there are interesting new business models forming around combination of television and social media, some of which may prove to be substantive. This report examines what we believe are the four key business categories at the intersection of social media and television.

Social TV navigation

For years, developers of television guides and navigation platforms have attempted to devise schemes for program discovery that rely on intelligent recommendations rather than grid-style presentations of program times and titles. Netflix, deservedly, is recognized as a leader here, but there are numerous like-minded platforms that attempt to identify programs sharing certain characteristics with the proclaimed likes or tastes of viewers.

Now, a growing number of "guide" developers are warming to the idea that the most effective — and ultimately the most personal — source for program recommendation comes from an individual's social circle. "Social TV reinvents the program guide," said Cory Bergman, the publisher of Lostremote.com.

While the idea that recommendations from friends can influence viewing choices may seem self-evident — after all, people have always relied on word of mouth recommendations for television — the efficiencies and volume of social media platforms now make it possible to bring scale to this notion.

A range of players, some backed by major media companies, are engaged in attempts to harmonize the social media circle with television discovery and program recommendation. A common approach is the concept of a "check in," which was originally inspired by the social media application FourSquare that lets mobile smartphone users announce their location to friends lists or followers. In the budding social TV navigation category, the "check-in" refers to what television programs people are watching.

As the volume of individuals who use social TV check-in platforms grows, a meaningful database of recommendation messages is created. Get Glue, a TV check-in provider that has been likened to FourSquare, counts more than 1 million users of its own application and says it has catalogued more than 170 million data points about who's watching what on television. To encourage more users to chime in, various social TV platforms including Get Glue reward users with merchandise, discounts or access to exclusive online content only registered users can see.

Business outlook: Monetization opportunities appear to be limited, with a reliance on advertising, TV network promotional alliances and some e-commerce/retail play representing key revenue sources. We believe the category has potential strategic importance, however, as a rising influence in viewership and "buzz" associated with television content. For that reason, we expect the check-in/discovery platform category to collapse into ownership by television industry incumbents that can benefit from hosting social conversation around program discovery. In particular, we look for integration of social recommendation/check-in platforms with set-top tuners and native TV guide platforms. Comcast's control of Tunerfish, an outgrowth of Comcast's 2008 Plaxo acquisition, may be indicative of a possible consolidation trend to come.

Get Glue: selected statistics

Total registered users:	1.3 million
Total check-ins in June 2011:	20 million
TV network partners:	35
Total shows promoted with rewards:	280
Biggest show premiere:	HBO's "True Blood," season 4 premiere (40,000 check-ins)

Source: Get Glue

The idea is to amass ever-larger databases in which users share what they're watching or what they like. Developers theorize that these databases then can be harnessed to present a more personal, humanistic recommendation engine than any algorithm can match, making it easier for viewers to find programming that suits their tastes.

"The irony of TV today (is that) the quality of programs is as high as it's ever been, but it's being distributed over this bewildering array," said John McCrea, CEO of Tunerfish, a social TV program-discovery firm owned by Comcast. He envisions social media as the backbone of a three-step progression:

- Capturing information about what programs people are watching/sharing
- Translating volumes of shared data into recommendations and program discovery
- Connecting socially derived program discovery into program selection via integrated devices

It's the last element that's largely missing today. As the list of selected participants on p. 5 shows, most lack tight integration with television itself. Instead, these applications rely on external devices and platforms (typically iOS phones/tablets and Android devices) to inform viewers about recommended programs and allow them to find content based on participant recommendations. Tuning in to that identified content requires another input device, such as an independent TV remote control and set-top box, in most cases. BuddyTV, one exception, has established integration with selected TiVO and Dish Network DVRs, plus Google TV, which allow BuddyTV users to select channels/programs using the BuddyTV application over a hand-held device.

Over time, developers aim to create mechanisms that marry the social check-in concept with the ability to instantly tune to a channel or locate a program online, creating a completed loop between recommendation and program selection that could be powerful. That linkage, said Tunerfish's McCrea, "is going to be TV's biggest transformation."

Today's television programming "is being distributed over this bewildering array."

— Tunerfish's McCrea

Social television: selected discovery/check-in applications

PLATFORM	OWNER/INVESTORS	WHAT IT DOES...	COMPATIBLE WITH...	URL
BuddyTV	Charles River Ventures	Content discovery application combines a program guide with social media dialogue to recommend shows. Integration with Google TV, Dish Network DVRs and TiVO allows for channel control directly from handheld device.	iOS (iPad, iPhone), Android	buddytv.com
Tunerfish	Comcast	Web platform invites users to share what shows they're watching and earn rewards for doing so. Users can then see what others are watching/recommending/conversing about. A "trending" feature points to shows rising in popularity.	iOS (iPad, iPhone, iPod Touch), Android	tunerfish.com
Miso	Bazaar Labs Google Ventures	Allows check-in to favorite shows from the application or via Twitter, Facebook integration. Alliances with some TV networks (QVC, WE TV, others) encourage check-ins by offering special deals and redeemable reward points.	iPhone, iPad, Android, Windows Phone 7, Blackberry Playbook	gomiso.com
Philo	Local Response (acquisition announced 8/5/2011)	Rewards-based check-in application for television shows plus social media message aggregation allowing TV networks to send promo materials, advertisements and content to fans.	iPhone, Android	playphilo.com
IntoNow	Yahoo!	Program-identification technology detects what users are watching, allows for one-button sharing in real-time from within the app or through Twitter or Facebook.	iOS (iPad, iPhone, iPod Touch)	intonow.com
TVGuide Watchlist	Lionsgate	Allows easy importation of "liked" shows on Facebook into personalized web guide spanning program occurrences on linear TV, online video and VOD.	Web-only (iOS, Android apps pending)	tvguide.com/watchlist
Get Glue	Union Square Time Warner Investments	Online check-in platform offers rewards in the form of merchandise discounts and collectibles. Counts 1 mil.-plus users for its own apps, plus extended reach of 30 mil. through Facebook integration.	iOS (iPad, iPhone), Android, Blackberry	getglue.com

Second-screen/synchronized content

There is significant momentum emerging for interactive television applications that blend social/conversational media elements with in-program content to create a rich, albeit occasionally distracting, viewing experience. If that sounds like the long-sought dream of interactive television pioneers, it is. But there's a big difference here: The screen where all the interacting is taking place is typically a handheld tablet computer or smartphone, not the television set.

"For decades people have been trying to scale ITV," said Lostremote.com's Bergman. Now it's happening through the "side" channel of independent, second-screen devices, and there is no shortage of enthusiasm over the pairing. "We believe that five years from now everybody will be using a second-screen device," said Somrat Niyogi, CEO of the social TV application developer Miso. "No matter what you watch or when you watch it, we're all going to have a second-screen device. We all believe that."

Even the largest distributor of interactive applications for TV sets appears to agree. Yahoo Inc., whose Yahoo Connected TV platform is embedded into 8 million TVs (with 16 million projected by the 2012 first quarter), also is moving to embrace the smaller, mobile screen with a newly introduced application that moves many of its partners' applications to companion devices in addition to the mainstay television. "You need to be wherever the consumer might be when they're sitting down to watch television," said Russ Schafer, senior director of global product marketing for Yahoo Connected TV.

The dual or simultaneous-screen environment itself is not a new phenomenon. Television researchers began reporting about an organic consumer embrace of multi-screen multitasking in the mid-2000s when surveys began to detect that large numbers of TV viewers were using laptop PCs while they watched. Today, the movement is widespread, with a recent Harris Poll reporting that 44% of the U.S. TV audience typically engages with a social media site while watching television. Propelling that number are smartphones and tablets that are quickly supplanting laptop PCs as the device of choice for companion viewing.

TV-second screen multitasking

% of adults who say that while watching TV, they…	
Surf the Internet	55%
Visit a social networking site	44%
Text on their mobile phone	37%
Shop online	29%

Source: Adweek/Harris Poll of 2,309 U.S. adults, May 2011

Business outlook: From a monetization standpoint, the standout contributor here is the ability to extend advertising inventory for a particular program across a companion screen that promises an engaged/interested viewer — at least when she/he isn't distracted by a non-stop Twitter stream playing to the side of a commercial message. In the case of ABC's "Grey's Anatomy" application, automaker Lexus enjoyed an order-of-magnitude increase in click-through rates. But TV networks have plenty of convincing yet to do about the value of the impressions generated through social-media enhancements to television at large. "I don't really know the value," said PepsiCo. digital media advertising executive Shiv Singha at the Social TV Summit. "I have no way to measure that with any rigor."

What's more, advertisers are smart enough to realize these second-screen constructs represent subsets of subsets of audiences. To see a Lexus commercial tied to the "Grey's Anatomy" broadcast, for example, users had to first download a specialized application, have their device available while watching, and remember to launch the application while the program was playing. We see the inventory extension play as analogous to some of the television industry's other advances into interactive advertising, such as a cable industry VOD "telescoping," practice that allows viewers to evoke detailed video about products appearing in standard 30-second commercials. In that case, we've heard sellers talk about pricing and rate premiums of around 15–20% for campaigns that feature the expanded capability. Second-screen ad-supported content that plays off a social media platform may represent a similar pricing upgrade opportunity, but doesn't appear to represent a breakthrough, billion-dollar plus category, at least for the moment.

Strategically, second-screen/synchronized content with a social media component could play an important awareness and retention role for certain programs. The HBO "True Blood" companion content represents the sort of audience ▶

Giving the category renewed appeal today is the combination of three important contributors:

- Smartphones and tablets support rich multimedia content in small-footprint companion devices that are well-suited for personalized conversations and interaction.

- Social media platforms including Facebook, Twitter and in-app conversational tools offer ready-made forums for real-time dialogue that have large user bases early interactive TV deployments lacked.

- Audio detection technologies automatically synchronize television output with companion content available on phones/tablets, creating a harmonious, integrated experience.

How they work: Second-screen, program-synchronized platforms push out program-related content optimized for smartphones, iPads and other tablet computers. Most rely on a program-detection technology such as Shazam's audio application that knows not only what program is playing, but what's happening at an exact moment. That allows content providers to link Twitter messages, rich media content and advertising to what's happening on the larger-screen television in real-time.

From a business perspective, in-program synchronization to second screens allows for networks to extend advertising inventory and impressions beyond the mainstay television broadcast, and/or to enhance their existing TV ad messages with interactive features. In an example cited by Shazam, two national commercials placed by the retailer Old Navy in 2010 extended their reach by applying a Shazam icon that invited users to browse for additional content through the application. Some 27% of those who did so ended up shopping for Old Navy merchandise, according to Shazam.

There are also opportunities for real-time advertising enhancement tied to commercials appearing on the larger TV screen. Because watermark detection and other program-recognition technologies also can sense what commercials are playing, it's possible to produce a synchronized second-screen experience tied to advertising messages. This is the approach taken recently by automaker Lexus in a second-screen sponsorship of ABC's "Grey's Anatomy" (see detail on page 8).

A drawback, however, is that scale is difficult to achieve. Not only must users be sufficiently compelled to download an application, they have to take the additional step of launching it while a show is being televised — otherwise there's no way to synch the second screen in real-time. Shazam, one of several application developers with an audio-recognition scheme, thinks the breadth of its platform gives it an advantage here. More than 50 million devices in the U.S. are equipped with the Shazam application, a number that gives it unusual scale in a nascent category and helps to overcome a fundamental challenge. "It's difficult to get people to download an application," said Shazam EVP of marketing David Jones.

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super-serving that can reinforce program allegiance and support subscriber loyalty, for example. But networks need ways to discern how far to extend their investments here. Speakers at the Social TV Summit noted some production companies are devoting dedicated teams of producers to create content exclusively for second-screen applications, an expense that will require justification going forward.

Finally, there is the possibility that second screen/synchronized content may help television industry participants engage more deeply in e-commerce opportunities tied to television content, personalities and programs. The oft-cited interactive television example of a viewer being able to purchase a sweater (or any fashion accessory) worn by a popular actress may be more relevant in a second-screen environment than it was when first envisioned as a staple application of TV-screen interactivity. "Today those who create content aren't benefitting from its fulfillment," said TV Plus CEO and founder Ajay Shah. Second-screen/synchronized content with a social media twist could help change that.

In all of these examples, however, the missing ingredients are scale and centralization. Requiring users to download, install and launch dozens of different applications for dozens of TV shows represents a convoluted approach that will frustrate users and depress participation rates over time. Whether TV industry participants would support a large-scale independent provider that unites many shows under a common app or platform is unknown, but an opportunity exists for a willful entrant to bring some uniformity and scale to the marketplace, potentially creating substantial value over time.

Second-screen social television examples are plentiful. Here are selected examples that illustrate the category's range:

NBC: **The Voice**

A companion second-screen experience NBC produced for fans of the popular reality show vocalist competition allowed network TV sponsors (Cars.com and Royal Caribbean) to add presence across synchronized devices, with a consistent message and brand feel. Collected social media comments from Twitter, Facebook and NBC's online message boards gave fans a chance to share performer evaluations and chatter while watching.

Turner Sports: **March Madness**

A social-media "arena" sponsored by Coca-Cola Co.'s Coke Zero brand collected Twitter and Facebook posts about the 2011 NCAA Men's basketball tournament and shared them with fans.

HBO: **True Blood**

One of the most visually engaging second screen/synchronization applications was "Bloodcopy," the 2010 online content offering tied to the popular HBO series "True Blood." The online extension amalgamated real-time Twitter commentary from fans and "True Blood" stars including actress Kristin Bauer. The idea was to "curate" the social media commentary that had grown up around the show in a single repository, said HBO social media specialist Sabrina Caluori. A successor initiative under way for the current season extends the idea in a second experiment designed to leverage the popularity of television-centric social chatter.

ABC: **Grey's Anatomy**

In addition to show trivia, behind-the-scenes coverage and Twitter messages, ABC's iPad "sync app" for the prime time drama featured integrated advertising content for Lexus. When the carmaker's national commercials aired during breaks on "Anatomy," so did the same spots, along with some enhanced interactive content, on iPads outfitted with the application. Based on Nielsen's Media-Sync platform, the Lexus-branded content produced click-through rates that were 10x the level typically associated with advertising on mobile devices, said Media-Sync SVP Scott Maddux. (In July, the application was nominated for a Prime Time Emmy Award for Outstanding Achievement in Interactive Media.)

Ratings and research

Ironically, one of the biggest economic contributors emerging from social TV may be all but invisible to the television fans whose Tweets and Facebook posts underpin the entire category. In the vast pool of digital message bursts that occur every minute online, a new breed of researchers believe they may have the makings of a better audience research platform.

"We are literally seeing in real-time a nation exploding into conversation," said Deb Roy, CEO of social media analysis firm Bluefin Labs.

By scraping publicly available social messages, researchers can compile impressive banks of comments and references tied to television programs, offering a rare combination of quantitative volume and qualitative evaluation. "It's a powerful way to understand the DNA of a show and its audience," Roy said.

The notion of mining social media data to help inform and supplement existing TV ratings and demographic knowledge is appealing to TV networks and advertisers that want a deeper look into who's watching, and what perspectives they exhibit. Trendrr, which captures and examines millions of social media messages and other inputs to come up with analyses of television performance, thinks it's possible, for example, to make informed predictions about audience levels for upcoming fall 2011 TV season premieres based on advance online conversations, said Mark Ghuneim, the CEO of Trendrr parent Wiredset. Trendrr.tv, which ranks television shows based on activity across various social networks (Twitter mentions, Facebook posts and check-ins on Miso and Get Glue), uses the data to help TV networks run "activation" programs that play to active social network users.

Trendrr TV: top shows in June by % of social activity

BROADCAST	
The Voice (NBC)	18.9%
Glee* (FOX)	8.4%
Family Guy* (FOX)	2.5%
The Simpsons* (FOX)	1.7%
Masterchef (FOX)	1.7%
CABLE	
BET Awards (BET)	24.3%
Pretty Little Liars (ABC Family)	9.6%
Basketball Wives (VH1)	8.4%
Teen Wolf (MTV)	3.3%
Game of Thrones (HBO)	2.1%

Source: Trendrr.tv

Business outlook: We believe social media could play a significant role in altering the dynamics of the television research category, which historically has relied on fairly broad demographic indicators such as gender and age, and in some cases remains tied to legacy diary measurements that do a poor job of exposing granular metrics. Nobody is suggesting that social media data mining alone will supplant measurement giant Nielsen Co. as the primary arbiter of television audiences, but the category may pose the potential, if combined with an alternative measurement methodology such as set-top tuning data analysis, to offer an interesting alternative that offers deep psychographic detail. Early enthusiasm and some scattered success stories among television networks in "activating" their social media circles based on mined data and trending also portend well.

But social media analysis has limits as a diagnostic tool. For one thing, the pool of users that produce the raw material of the trade — millions of Tweets, Facebook posts and check-ins — doesn't represent the TV viewing audience at large, but only a subset of the audience that happens to use social media. Even then, the sample is disproportionately influenced by active users. Only about one in 70 Twitter users regularly Tweets, said Matthew Wiggins, CEO of the Los Angeles social media analysis firm WhatsWatched Inc. That's one reason his firm conjoins social media mining with passive behavioral data to come up with more representative views. Others are pursuing similar blended approaches — social media mining and passive measurement techniques — out of recognition that even social media enthusiasts don't Tweet or post about everything they watch.

A second impediment is that there's little science on what sort of importance to ascribe to the raw data that are collected. "I don't know if anybody knows what the value of a positive Tweet for a show is," said WhatsWatched partner Matt Burr.

Few developers argue that social media analysis is destined to be a Nielsen substitute, at least for now. But within the digital conversation there are insights that can help networks shape programming decisions and understand early trends, advocates say, with a granularity and a human dimension that may bring fresh understanding of the relationships between viewers and television. "These are incremental insights, remember," said Bluefin's Roy.

"I don't know if anyone knows what the value of a positive tweet for a show is."

— Matt Burr, partner, WhatsWatched

Program promotion

This catch-all category of social TV is also the most widely used. Nearly every television network or program promotion staff devotes a significant share of its marketing attention and effort to social media. Facebook pages and Twitter streams dedicated to programs are now base-level requisites of television promotion.

The appeal of social media as a promotional channel isn't just the rising popularity of the platforms, but their affordability and efficiency to marketers. Niche-video studio Funny or Die recognized the efficiency of social media awareness in July when it released a three-minute video parody of the movie "Field of Dreams" tied to the NFL player lockout. "We just sent a picture out with a (Twitter) hashtag and it became a trending topic on Twitter," said CEO Dick Glover. Through Aug. 7, the video had generated 1.5 million views on Funny or Die's ad-supported website.

The TV network establishment also has had similar success stories involving social media. When the CW Network's "Vampire Diaries" prime time series was scheduled to return to the network in January 2011 after an eight-week hiatus, the network's promotion department had a budget of just $50,000 to spend on tune-in advertising, said EVP Rick Gaskins. Aiming to ignite an organic social media embrace, the network slapped a tongue-in-cheek message on a Sunset Blvd. billboard — "Get VD" — and within two hours saw more than 100 Google alerts posted by fans. The CW team followed the stunt with a second billboard and a special video clip available only to "Diaries" Facebook fans that collected close to 15,000 Facebook "likes" in less than half an hour. When the new season-premiere aired, its total audience was up 15% from when it had left off late in 2010 despite running directly against FOX's "American Idol." The lesson: social media can be a powerful inducement for tune-in, even with a limited budget. "You can absolutely open shows with social media," Gaskins said.

Other TV networks also have marshaled the voice of social media fan groups to help stir interest in shows. FX Networks now produces original live programs featuring the creator of its prime time drama "Sons of Anarchy," making them available only to the show's social media followers. The network also has leveraged live Tweets from actor Danny DeVito, who routinely comments via Twitter as the FX sitcom "It's Always Sunny in Philadelphia" airs. For "The Voice," NBC has played up the availability of live Tweets from celebrities including Christina Aguilera and show contestants during and around the live competition.

The efficiency of the social media channel has particular appeal to television marketers who routinely devote significant amounts of spending to paid media such as cross-channel promotion, billboards, radio spots and paid online advertising. Network promoters like social media not only because it works, but because it's inexpensive, and sometimes, when organically propelled by fans themselves, even free.

Business outlook: Network television marketers have shown early dexterity in translating the engagement of social media users to ratings upticks.

We think the bigger opportunity for tune-in, though, is finding a way to directly link social media promotion with instant viewing decisions over an integrated platform.

Online video providers have an advantage here, in that many of the same devices used to interact with social media platforms also can be used to watch TV shows and movies. Shuffling from a friend's TV show reference on Facebook to the latest episode on Hulu requires nothing more than clicking a Facebook hyperlink. It's analogous to selecting a program on the big-screen TV from an on-screen listings menu, except in this case the program choice is informed by the powerful influence of a friend's recommendation, not a static listing display. Knowing this, online video providers and a few multichannel video distributors are exploring a variety of ways to link their video platforms directly to social media.

- **Hulu.com** has launched a Facebook application, Facebook Connect, that lets Hulu users log on to Hulu.com from their Facebook accounts, comment on what they're watching, insert brief video clips into Facebook posts and find out what friends are watching.

- **Netflix,** which has close management ties to Facebook (co-founder Reed Hastings joined Facebook's board of directors in June), is pursuing a Facebook alliance for its Latin America and Canada users, but has shied from a U.S. Facebook integration. Hastings has said it's not for lack of desire, but out of concern that a 1988 U.S. privacy law, the Video Privacy Protection Act, may make it illegal to publicly post data on what subscribers are viewing.

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Conclusions

Clearly, meaningful business categories are in development as social media and television intersect across business and consumer ground. But quantifying the economics of the social TV movement is impossible, not only because of an absence of public data but because the ground is shifting constantly. "It seems like there's a new social TV start-up every two to three weeks," said Tunerfish CEO John McCrea.

Even so, some companies are building workable business models already. Clipsync, which helps TV programmers like Starz Media and MTV Networks distribute video content to online viewing communities, recently completed its third consecutive profitable quarter, said CEO Itzik Cohen, proving that, as he quipped, "I guess it is possible to be a profitable social TV company."

In the field of original Internet video production, social media is an essential driver of awareness and a requisite for amassing audiences with a level of efficiency that earlier efforts lacked. "If you keep the costs of content low, and the cost of marketing low, and you aggregate an audience, you can make a nice chunk of change," said Funny or Die CEO Dick Glover.

Whether that model scales up to serve bigger television/entertainment ambitions is unclear. Category proponents point to big numbers for social television involvement as proof that there's a huge category in the making. There have been, by some estimates, more than 1.6 billion references to TV shows on Facebook to date — and counting. With scale and volume at that level, networks, producers, researchers, advertisers and video distributors can't afford to ignore the opportunity presented by social media and television. "TV executives are breaking the buzzword bank to describe its promise," said Michael Kassan, the CEO of media advisory firm MediaLink.

There are some captivating projections for social TV, to be sure. Advertising industry analyst Jack Myers believes social TV, in a broad definition of the category, will grow to be an $8 billion to $12 billion business by 2020 from less than $2 billion today. In an interview, he said advertising will fuel most of the growth. "Fundamentally, it reflects a seismic shift in marketing from being intrusive, one-way communication model to being an interactive, engaged participatory process," Myers said.

That may be, but for now it's worth noting that not everybody is certain they have an answer to the social-TV monetization question.

Ben Silverman, the former co-chairman of NBCUniversal and a Golden Globe-winning TV producer, encapsulated the uncertainty at the Social TV Summit by describing his experiences with social media at Electus, the television content studio he now runs. Even though Electus-created shows like VH1's "Mob Wives" have attracted huge Twitter and Facebook fan bases, Silverman admitted that "We haven't really figured out how to monetize (social TV) yet. Other than us serving up additional content, which costs us money, we're not really making money off it. Facebook and Twitter are making money off it." Changing that equation is the challenge for social TV participants from this point forward.

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- **Warner Bros.** has beta-launched a social-entertainment application, Flixster Collections, that lets users share purchases and playlists from iTunes, Netflix and Hulu while discovering what movie and TV titles others have viewed/purchased.

- **Vudu,** the online movie and TV download site, lets users share movie ratings on Facebook and Twitter directly from Vudu-enabled TVs and Blu-ray players.

- **Comcast** introduced at the June 2011 Cable Show a cloud-based video navigation platform that blends available program choices from live channels, VOD and DVR repositories with on-screen Facebook pages that let users see friends' program recommendations.

- **Verizon** has integrated both Twitter and Facebook accounts directly onto the television screen in an application available to customers of its FiOS TV platform, representing the most ambitious social TV initiative yet by a multichannel video distributor.

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