More than 20 years ago, TV viewers were introduced to reality TV programming. In those 20+ years we've experienced many different reality shows. There have been numerous seasons of competition shows like American Idol, Top Chef, and Survivor and shows based on “interesting” families like Here Comes Honey Boo Boo, Duck Dynasty, and Keeping Up With The Kardashians. Many shows even resulted in spin-offs, further saturating the content schedules. What was once seen as a new, entertaining TV genre, is not grabbing as many viewers as it once was.

Since January 2013, CivicScience has been asking consumers how much reality TV they watch in an average week. After Q2 of 2013 we started seeing weekly reality TV viewing hours decline. An article in The Guardian states the decline could be due to lack of innovation and redundancy. The number of people watching reality TV has since continued to drop.

CivicScience has a syndicated question in our InsightStore™ that was used in this report – “How much would you say you watch reality TV in an average week?” This Insight Report shares details on the overall decline of reality TV viewership by looking at two groups:

- Reality TV “super fans” or those who watch 5+ hours of reality TV each week.
- Moderate reality TV watchers in 2013 vs. 2014.

March 5, 2015: Reality TV is on the decline, but not it’s not completely fading from televisions yet. In this report, CivicScience illustrates the declining trend in the reality TV genre and focuses on highlighting the super fans and the moderate viewers of the genre. After collecting over 82,000 responses since January 2013, we analyzed:

- Analysis of “super fans” -- those who watch more than 5+ hours of reality TV each week.
- A time-based comparison of “moderate viewers” – those who watched 1-5 hours of reality TV each week in Q3 2013 to those who watched in Q4 2014.

Focusing our attention on the demographics and behaviors of the reality super fan could enable networks and producers to see who the loyal fans are and what they enjoy. Also, by highlighting differences of the moderate viewers before and after the decline, we can see how this segment of people changed. With this information, networks and producers can create more meaningful content to hopefully keep the super fans engaged and perhaps win back some of the lost viewers.
Top-Line Analysis

How much would you say you watch reality TV in an average week?

Weighted according to U.S. Census figures for gender and age 13 and older

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<thead>
<tr>
<th></th>
<th>Q3 - 2013</th>
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<td>0+ Hours</td>
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- **Non-viewers**: In Q3 2013, 43% of consumers said they watched no reality TV each week, vs. in Q4 2014 when 53% of consumers said they watched no reality TV. So people are now roughly 23% more likely to **not watch any reality TV**.

- **Moderate watchers**: In Q3 2013, 39% of consumers said they watch 1-5 hours of reality TV each week, vs. 33% of consumers who answered this way in Q4 2014 – so a drop among moderate viewers.

- **Super fans**: Among those who watch more than five hours each week, viewership only decreased four percentage points (18% vs. 14%) from Q3 2013 to Q4 2013. So reality TV viewership among super fans is decreasing here too but at a slower rate.

How much reality TV do you watch?

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<th>Q3 2013</th>
<th>Q4 2014</th>
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<tbody>
<tr>
<td>5+ hours/week</td>
<td>18%</td>
<td>14%</td>
</tr>
<tr>
<td>1-5 hours/week</td>
<td>39%</td>
<td>33%</td>
</tr>
<tr>
<td>None</td>
<td>43%</td>
<td>53%</td>
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Reality TV Super Fans

We looked into those who are reality TV super fans – watching more than five hours of reality TV each week and compared them to the general population. Using such insights, networks can get a better idea of how to market and advertise to this segment of fans.

Demographics:

- Today’s Super fans are only 10% more likely to be women than the general population.
- 36% of super fans are 55+ years old, which is 20% more than the general population.
- Super fans are 20% more likely to be grandparents.
- Super fans are 32% more likely to be a homemaker or retiree.
- They have a very similar income as the general population.

Entertainment:

- 39% of super fans watch 4+ hours of TV every day, which is 95% more than the general population. (We recently did a brief study into these “heavy” TV viewers, which you can view here.)
- They are 60% more likely to value TV shows and say they are important to them or are a passion of theirs.
- They are 13% more likely to say ads on TV (as opposed to Internet ads or social media feeds) have the most influence on what they buy, where they eat, or the movies or TV shows they watch.

Lifestyle:

- Super fans are 20% more likely to take vitamins or supplements daily.
- They are 15% more likely to tell family/friends when they are happy with a product.
- They are 21% more likely to consider themselves spendthrifts than the general population.

Market Interests:

- They are 25% more likely to follow trends and current events in the TV and movie industry.
- They are 25% more likely to follow trends and current events in fashion.
- They are 19% more likely to follow trends and current events in food and cooking.

The reality TV super fans, since the beginning of 2014, are more likely to be older women, who are retired or homemakers. They value TV more than the general population, so it’s not surprising to see they watch more TV each day. Reality TV super fans are also more interested in fashion and food and cooking than the general population. This segment of viewers are also more likely to be influenced by advertising on TV rather than on the internet or social media chatter. By creating or showing content that appeals to older women who have grandchildren and are into fashion and cooking, networks may be able to retain the amount of weekly viewers.
Since we have the data, we wanted to compare snapshots of moderate-level reality TV viewers based on Q3 2013 (before the decline) and Q4 2014 (after the major decline), to see what has shifted and what can be learned from that. Such insights may be useful to those producing and marketing reality TV content to help mitigate (and potentially turn around) declining audience numbers.

**Moderate Viewers**

Among this audience group, we found some note-worthy demographic and entertainment differences. So who are those who watched 1-5 hours of reality TV in Q3 of 2013 compared to those in Q4 of 2014?

**Demographics:**

- Men were more likely to watch reality TV at a moderate level in 2014 than in 2013.
- 2014 moderate watchers are over 2X as likely as 2013 watchers to still live with their parents.
- 2014 moderate watchers are 60% more likely to be age 29 or younger than 2013 moderate watchers.
- 2014 moderate watchers are 41% more likely than 2013 watchers to not have children (52% of 2014 watchers aren’t parents, vs. 37% of 2013 watchers).

**Entertainment:**

- 2014 watchers are 2.5X as likely as 2013 watchers to play video games daily.
- 2014 watchers are over 2.5X as likely to read Science Fiction & Fantasy books most.
- 2014 watchers are 48% less likely to say their favorite movie genre is drama.
- 2014 watchers are over 2X as likely as 2013 watchers to stream content on Netflix weekly.
- 2014 watchers are 25% LESS likely to say TV ads have the most influence on their purchases (vs. internet ads and social chatter) than 2013 watchers.

The moderate viewers in Q4 2014 are younger and are more likely to live with their parents than those in Q3 2013. Today’s moderate viewers are more likely to be men and less likely to be parents than those in 2013. They are more likely to stream content on Netflix weekly, play video games daily, and are less likely to be influenced by TV ads.

**Summary**

Reality TV is on the decline and has been for a while. Those who watch 1-5 hours of reality TV each week are more likely to be tuning out reality TV than those who watch 5+ hours. Although TV ratings are great to show the total number of viewers of specific shows and the basic demographics of those viewers, they don’t provide details about the psychographics of those who are watching. By focusing on the demographics and behaviors -- and what’s changing over time -- networks and producers can create more meaningful content and experiences that will keep consumers engaged, can potentially win back some lost viewers, or they can at least choose scripted content that is better suited for their audience.
About the CivicScience Methodology:

CivicScience collects real-time consumer research data via polling applications that run on hundreds of U.S. publisher websites, cycling through thousands of active questions on any given day. Respondents are 100% voluntary opt-in with no incentives, compensation or coercion -- they answer just for fun and are kept anonymous, allowing for greatly reduce bias and higher levels of engagement. The over 82,000 respondents for this report were weighted for the U.S. Census, 13 years and older, and data was collected from July 2013 through February 2015, with the time-based comparisons ending at December 31, 2014. Using its technology, CivicScience builds deep, timely psychographic profiles of these anonymous respondents with each question they answer over time, providing valuable consumer sentiment and behavior insight data to the decision makers who care. The CivicScience methodology has been scientifically validated by a team of academic leaders and by independent research firms. CivicScience currently has more than 30 million anonymous consumer profiles stored, growing daily.


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