

ADAPTING TO SOCIAL MEDIA: COMMERCE, CREATIVITY AND COMPETITION IN UK TELEVISION PRODUCTION

by Prof. James Bennett and Dr. Niki Strange





© This work is licensed under the Creative Commons Attribution-NonCommercial-NoDerivatives 4.0 International License. To view a copy of this license, visit: <http://creativecommons.org/licenses/by-nc-nd/4.0/>

This project has received funding from the European Research Council (ERC) under the European Union's Seventh Framework Programme (FP7/2007-2013). Grant Reference ERC-2012-ADG_20120411.

ISBNs 978-1-905846-88-7 and 1-905846-88-6

CONTENTS

Introduction: The 'Opportunity Gap' of Social Television	04
About the Authors	05
Contact Details	05
Executive Summary and Recommendations	06
Method	08
SECTION 1 The Business of Social Television: Finance, Strategy and Success	10
SECTION 2 Making It Social: The Production Practices of Social Media for Television	20
SECTION 3 Adaptation and Innovation in Social Television Production	30
SECTION 4 Multi-skilled and Always On: The Roles and Workplaces of Social for Television	40
SECTION 5 Platforms as Partners or Predators? Competition, Collaboration and Co-option	48
SECTION 6 The Future	56
Acknowledgements	60

Published May 2018

INTRODUCTION: THE 'OPPORTUNITY GAP' OF SOCIAL TELEVISION

This report explores the impact social media is having on UK television production and distribution. Whilst there has been significant concern with how social media is changing audience habits, this research focuses on the role it is increasingly playing as a production technology within the TV industry. In particular we set out how financial, organisational and business imperatives intersect with the sector's production cultures, working practices and skills base to make social media a major concern for the industry's future. 44% of our 2017 Pact member survey¹ respondents regard social media as the most significant strategic, technical and creative innovation challenge for television producers, ahead of virtual (26%) and augmented reality (12%).

This challenge - and opportunity - spans how companies derive revenues from social media, resource it, develop the skills and production practices to harness it effectively, compete and collaborate with new players, measure success and return on investment. Whilst many recognise 'social television' (see Method) has moved from being a 'pain in the ass' (Interviewee 38) to a 'necessity for reaching' audiences (IV47), it is also an area that is relatively under resourced in terms of financing, training and staffing. Thus few companies working within the television sector have established successful financial models for the integration of social into their businesses:

- less than 25% of survey respondents have derived new revenues from social media in the 2 years 2016 and 2017.
- just under half have any staff who are trained specifically for social media work.

Our research therefore suggests that social television can be understood as an 'opportunity gap' for television.

That is, the prevailing structures and conditions of the industry create a deep-rooted set of barriers that prevent

effective exploitation of this new market. Focusing on the opportunity gap shifts our attention onto the structural and resource issues that create and enable opportunity, rather than just the outcomes of current endeavours and strategies.² Return on investment (ROI) will only be possible by concentrating on these structures. This report offers insights into how companies can more successfully operate, and monetise their investment, in an emergent social television marketplace in which broadcasters, platform operators, TV 'Indies', digital agencies and marketing companies must all compete and collaborate.

More than this, addressing the opportunity gap will enable workers in the sector to achieve social television strategies that also create value in non-economic terms: that fulfil public service broadcasting remits, generate professional and creative reward, and develop job roles and training for new entrants with clear career paths. This opportunity gap can be attended to by a range of adaptations to television's current structures, such as production processes, business models and training, which we offer insights on here.

There are already a range of companies innovating in this space, creating both compelling experiences and viable business models. At the micro level, new job roles and expertise - such as the 'Preditor' and the Social Media Manager - have emerged that are making particular skill sets a valuable commodity in the sector's economy.

But it is also clear that the industry needs to move rapidly as new players are ready to step in and exploit the social television market. Broadcasters find themselves competing with social platform operators who are increasingly acting like channels, adapting to learn the lessons of television's past to secure their future. Television production companies find they must now compete or collaborate with digital agencies able to

¹In partnership with Pact, the trade association for TV, Film, Digital, Animation and Children's Media Indies (www.pact.co.uk), we conducted two surveys of their members in 2016 and 2017. In 2016, 180 companies provided data and in 2017, 70 companies completed the survey. See the Method section for more information.

²The term 'opportunity gap' comes from studies of levels of attainment in education: Carter, P.L. and Welner, K.G. (2013). 'Achievement gaps arise from opportunity gaps'. In P. Carter and K. Welner. (Eds). *Closing the Opportunity Gap: What America Must Do to Give Every Child an Even Chance*. Oxford University Press: Oxford, pp. 1-10.

“ Clearly social media is an important tool for content producers today - for promoting their wares but also as a new means of generating some additional revenue. (This research) indicates that there is a strong desire for more training in this area, so we can better utilise the platforms available, and - as an industry - adapt in what is a rapidly evolving landscape. Producers have always been great innovators, and this is a challenge and an opportunity we must embrace if we want to ensure we maximise the benefit to our businesses ”

John McVay, Chief Executive, Pact (30/01/18).

reach audiences 'where they live' on social platforms and in formats that speak to different viewing and consuming sensibilities. We provide new insights into the way television is produced that will illuminate both current industry practice and scholarship to understand the challenges and barriers for those seeking to address the social television opportunity gap.

Digital copies of this publication are available at:
www.adapttvhistory.org.uk/social-media-project/report2018

About the Authors

James Bennett, is Professor of Television and Digital Culture at Royal Holloway, University of London. He is the Principal Investigator on the ERC-funded ADAPT Social Media research project. He likes Vegemite and Triathlons.

Dr Niki Strange, is Post Doctoral Researcher, ADAPT Social Media research project at Royal Holloway, University of London. She is also an innovation and business strategist for creative media companies. She would really love a dog.

Contact Details

Professor James Bennett

Department of Media Arts
Royal Holloway, University of London
e: james.bennett@rhul.ac.uk
t: @james_a_bennett

Dr Niki Strange

e: niki@strangedigital.co.uk
t: @nikistrange
l: www.linkedin.com/in/nikistrange





EXECUTIVE SUMMARY AND RECOMMENDATIONS

Social television represents a significant opportunity for the UK television industry to exploit commercially, creatively and organisationally. 76% of all UK Internet users have a social media profile and the range of platforms they are using is proliferating.³ This transforms not only how people watch television but also how it is produced, with social media increasingly a routine part of the production process: either as a tool within the creative workflow or as a strategy to reach audiences in new ways and spaces. Whilst the industry is adapting to this new landscape, driving innovation and deriving new revenue streams, it is also a rapidly changing production ecology that is defined by fierce competition and new modes of collaboration.⁴ Social television represents both an opportunity and a threat: a necessity to reach and engage audiences in the spaces where they increasingly spend their screen time, yet difficult to exploit effectively in both creative and commercial terms.

Our research suggests current structures within the industry mean there is an 'opportunity gap' in companies being able to achieve strong return on investments - creatively or commercially. This opportunity gap is defined by:

- Fast moving opportunities to create new forms and experiences of social television, but a reliance on business models that remain tethered to broadcasting or are niche and experimental;
- The role of social media metrics being largely unreliable, despite offering finer granular detail: current metrics regularly tell a story that stakeholders want to be told;

- The lack of clarity and willingness to approach intellectual property rights flexibly to promote innovation in both social television form and business models;
- Successful social television strategies often fuse editorial and marketing functions of social media, but the role of social media is frequently siloed, commercially and organisationally, as 'simply' marketing;
- A lack of investment in the production sector by broadcasters and platform operators alike. Although platform operators have begun to move into commissioning content, this has predominantly led to in-kind rather than substantial new investment in the production sector;
- A new power balance in the television industry that many are still struggling to adapt to. Platform operators now wield unparalleled power to shape broadcasters', content creators' and marketing companies' relationships with audiences via control of the underpinning technology, particularly the algorithms that determine what audiences see, where and how they encounter content;
- Innovation is a hallmark of UK social television work, but other countries are making significant innovation and investment leaps in social television that may leave the UK behind;
- A lack of training in how to produce social television that inhibits the development of cutting edge skills. This cannot be filled alone by the assumption or 'myth' of the digital native 'intuitively' understanding social platforms;

³Ofcom. (2017). *Adults' Media Use and Attitudes Report 2017*. p. 3. [online] Available here: https://www.ofcom.org.uk/__data/assets/pdf_file/0020/102755/adults-media-use-attitudes-2017.pdf [Accessed 8 Jan. 2018]

⁴We draw on Simon Cottle's notion of a 'production ecosystem' but also Bruno Latour's actor-network theory in our approach: Cottle, S. (2004). Producing Nature (s): On the Changing Production Ecology of Natural History TV. *Media, Culture & Society*, 26(1), pp.81-101; Latour, B. (2005). *Reassembling the social: An introduction to actor-network-theory*. Oxford: Oxford University Press. [Accessed 25 Feb. 2018].



- Social television work is now incorporated into a variety of job roles across the industry, only occasionally being seen as a bespoke role. This has led to the growth of 'slash' roles such as the 'Preditor' (Producer/Editor), which require workers to master a diverse array of skills that fuse communications, pre-production, production and post-production work, spanning copywriting, image production, animation, videography, editing and design;
- A dearth of talent to fill senior and bespoke social television roles that require staff to master skills including those listed above as well as brand and talent management, compliance and ethics, IP and regulatory knowledge;
- Social television production spreads work across a range of locations and times that blur professional and personal boundaries, which can lead to errors, security breaches and increased pressure on staff to work all hours;
- A lack of regulation that is being met with compliance and ethics approaches either imported wholesale from broadcasting or developed on an ad hoc basis. Self-regulation, whilst the preference of platform operators, is unlikely to provide the basis for UK industry to address the opportunity gap of social television.

Some of these structural issues that define the opportunity gap might be addressed by the following recommendations:

Recommendations

1. Developing training programmes at Higher Education, Further Education and Professional level that prioritise a combination of skills for social television production, including shooting and editing video for social; data analysis; platform-specific insights; writing for social media; graphic design; understanding algorithms. Such skills will require greater fusion of traditionally separate creative and science-led disciplines: from STEM to STEAM;
2. Developing qualitative methods for understanding the meaning of social interactions in a manner that combines sociological, data and psychological approaches;
3. Regulating social media platform operators as publishers, developing a hybrid approach that draws on broadcasting and social media standards to focus initially on compliance, ethics and intellectual property;
4. Recognising the role of broadcasters as investors in social television, giving them greater remit to invest in social television production that can fuel innovation in form, content and business models, reaping mutual benefit for UK distributors, content-makers and audiences alike;
5. Recognising the skill and expertise of social media in staff roles to develop and retain production talent;
6. Continuing to develop a simplified and streamlined rights framework for social television that ensures UK producers are able to effectively, and innovatively, exploit IP on social platforms.



METHOD

The findings here draw on 2.5 years of research, funded by the ERC (ERC-2012-ADG_20120411) as part of the Adapt TV History Project (www.adapttvhistory.org.uk). Our remit was to study a 'live production' issue faced by current industry, set against the backdrop of the wider Adapt project's focus on the history of TV production technology between 1960 and the present day. Our aim was to produce an understanding of social media as a technology that not only enters the technological array of television production as an external force of creative disruption, but also extends our understanding of 'production technologies' to incorporate social media platforms as non-hardware, non-site specific production tools. In so doing we hoped to capture the emergence of a new field of 'social television' production.

We investigated 4 inter-related questions:

1. How does social media operate as a technology in contemporary UK television production and how does it fit into the array of technologies used?
2. How (and has it) moved from innovation to routine use?
3. How does the deployment of social media affect production roles, skills and training?
4. How does social media affect the work lives of those in contemporary UK television production?

The findings in this report are based on:

- 57 semi-structured interviews with company directors, producers, technicians, commissioners, senior executives and policy makers from across the BBC, BBC Worldwide, Channel 4, ITV, Twitter, YouTube as well as from television, social and digital Indies involved in 'social television' productions;
- Ethnographic data based on 3 observation field trips to live UK social television productions;
- An annual online survey run in the Autumns of 2016 and 2017 of Pact (www.pact.co.uk) television and digital members, garnering 250 responses;
- A focus group in 2016 to discuss the findings of the survey and qualitative data to that point;
- Analysis of annual reports of the BBC and Channel 4, Ofcom data, Pact, industry events, trade press and reports;
- A cross-genre focus, with a particular emphasis on Entertainment, Live Programming, Drama and Children's production.

Our interviewees work at varying levels of seniority within their organisations. This approach enables us to test those answers from senior executives about the role social media plays in television production against the experiences of those working on a range of productions. We privilege neither source as an absolute 'truth'.⁵ Ultimately social television productions vary from project to project and change rapidly according to the confluence of strategic and technological priorities privileged by the sectors' 'actors': broadcasters, platform operators, tech companies, TV Indies/Superindies, digital agencies, marketing and communications companies, regulators and freelancers.

- Interviewees are anonymised and referred to by numbers throughout: IV1-57. The exception being case studies where attributed quotes are signed off by interviewees in order to identify a company/project.
- The designation 'FN' refers to Field Notes from ethnographic work throughout. Where Field Notes refer to a direct quote, the date of this observation is also provided.

What we mean by 'social television'

We use the term 'social television' to include social media content production, marketing and communications made explicitly for television experiences but also the way in which social media tools are progressively integrated into television production processes, cultures and strategies. Social media is an increasingly routine part of the television production ecology, forming a crucial part of a diverse array of roles, including producers, directors, runners, dedicated social and digital media producers as well as emergent hybrid roles. The role of social media in these spaces often overlaps, or sometimes lies between, editorial and marketing responsibilities, with the production of social television experiences also frequently spread across companies, departments, teams and individual roles.

As social platform operators move into delivering television experiences, either in partnership or competition with the existing TV industry, the lines of what is/is not 'social television' are blurring: presenting issues in production organisation, financing and even in developing shared understandings of how and where social media and television interact. Social television thus includes the television industry's use of social media, as well as social media platforms' use of television. This report set out an understanding of an adaptive social television landscape that increasingly integrates social media into its production practices, job roles and business models.

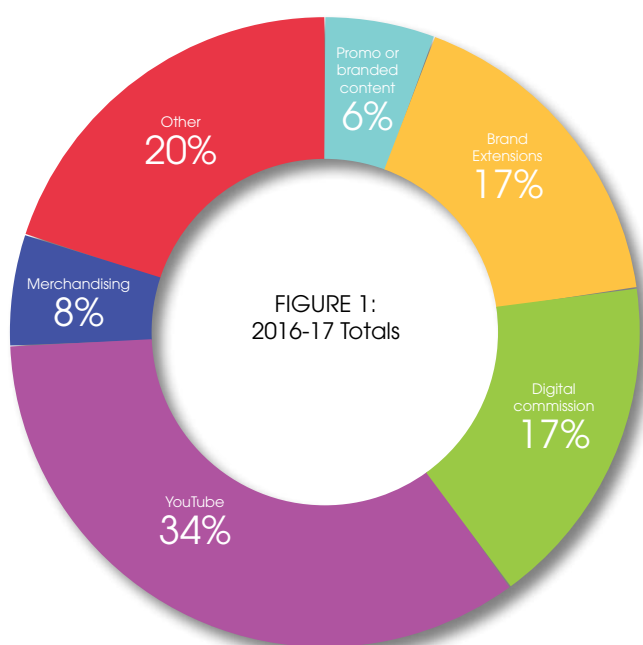
⁵Our approach throughout is guided by 'production studies' methodologies and concerns: Banks, M., Conor, B. and Mayer, V. eds.(2015). *Production Studies, the Sequel!: Cultural Studies of Global Media Industries*. Routledge

SECTION 1:

The Business of Social Television: Finance, Strategy and Success

Social media is an almost taken-for-granted aspect of the contemporary television experience, with over 76% of adult Internet users having at least one social media profile⁶ and 62% of viewers going online via a second device whilst watching TV.⁷ For younger audiences, time spent online is outstripping television watching by 3:2 according to Childwise research on 5-15 year olds in 2016,⁸ whilst Ofcom reported the same year that the duration children spent online had overtaken that of watching TV for the first time.⁹ As such, there is a growing recognition that to continue building successful television brands, there is a 'commercial imperative ... to have ongoing relationships [with audiences] and be part of the conversation' that extends beyond the television programme (IV48). However, less than 25% of our Pact survey companies indicate they have successfully adapted their business models to monetise social television. As the opening quote to this Section suggests, returns can often remain intangible, at least in the short term, leading many to question how significant an investment they should make in social.

Our surveys indicate that the number of companies deriving additional revenue via social television has decreased slightly from 2016 (25%) to 2017 (20%) at the same time as new revenue channels have opened up via, for example, Snapchat and Mashable. For those able to derive new revenues the predominant source comes from YouTube, with digital commissions and brand extension work representing the next most common revenue streams (see Figure 1).



Entertainment, Drama and Children's genres are substantially more likely to yield social television revenue streams than Factual programming (see Section 3). Genre also impacts on which platforms companies predominantly use, with Children's television production placing the strongest emphasis on YouTube, reflecting the platform's increasing importance to younger audiences:¹⁰ 67% of Children's-focussed production companies use the platform 'Often', compared with just 17% of Entertainment and 14% of Drama-oriented companies (Survey 2017). In comparison, over 80% of Entertainment and 50% of Drama focused companies 'Often' used Twitter in both 2016 and 2017 - with Facebook the next most important platform for each genre. Whilst some smaller companies complain that it is a 'struggle to monetise/develop strategy to use IP across other platforms' (IV1), our sector surveys suggest company size is not a significant barrier or advantage for exploiting social media as a new revenue stream: 57% of revenue generators in 2017 (up from 40% in 2016) are 'Micros' in terms of employees (less than 10) and only 21% belong to a larger media group.

In this Section we set out some of the key concerns, priorities and strategies that companies face in exploiting social television. We examine how success and return on investment is measured before turning to a handful of examples that demonstrate innovative or adaptive business models successfully exploiting the opportunity gap of social TV.

1.1 Finance, Revenue & Strategy

With so few companies deriving new revenues from social media, the increasing audience expectations of a social presence can become a significant drain on company resources, staff time and bottom line. Production companies are expected to have a social presence for both individual programmes as well as for their overall company brand - with both often requiring a year round presence, regardless of whether shows are currently on air or not.

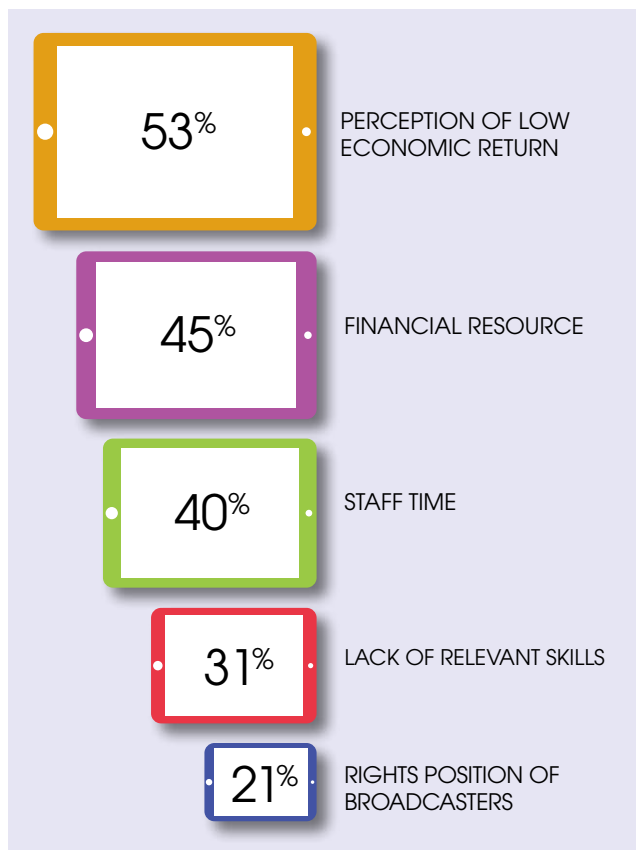
Given the unreliability of metrics (see Section 1.2), experimentation is a crucial ingredient to success, especially due to the fast-evolving social platform landscape and shifting priorities of platform operators (See 1.3 and 3.1). However, this imperative can also exacerbate the strain on resources when social media activity is overwhelmingly funded from company overheads. 55% of companies 'Always' or 'Often' used general overheads to fund *company activity* in 2017 and 41% used this source to fund social media work directly related to individual *TV productions*. Significantly, there has been a large shift away from the use of general overheads as the key source of funding TV production's social media work in 2017: dropping from 78% the previous year. This shift, however, does not reflect a corresponding increased investment in social television work from broadcasters, which remains the least likely source of finance for either activity at 25% in both years. Many Indies perceive broadcasters' investment

“ The first question (TV people) ask is, “What’s the ROI? Why would I do this stuff on Twitter? Why should I do this stuff on Facebook? I just want people to come to my website, I need people to just come to watch my show, that’s all I’m driving to”. That doesn’t see the value of having connection and followers on the platforms where people are “

(IV9).

in social as taking place at the channel-brand level, rather than individual programmes, because commissioners and channel controllers can’t see the return on investment (IV13, 30, 31, 36). Greater investment is arguably necessary to help move the sector from experimentation to monetisation. At present, the lack of funding leads to ‘switched-on producers hiding [social costs] in their production budget’: with this source now representing the most frequently utilised financing option (rising from 30% to 37%). As one interviewee explains, such tactics also provide producers the added advantage of being able to ‘keep control over’ how social media is deployed (IV25). Finally, whilst social media platforms themselves have stepped in as commissioners (see Sections 1.3 and 5), few companies currently view this as a significant funding source.

As a result, there is a widespread perception of several significant barriers to investment in social media.



The level of staffing required to produce compelling social media around television properties is often surprising to television producers: ‘when they see our team sitting together it’s like “there’s loads of you”. And it’s like, “guys, you are all making one show on one channel and we’ve got four or five channels to put everything out all at once’ (IV35). Investment in staffing, along with the wider financial resourcing required for such social media production, is thus a significant barrier. Whilst larger Indies are more likely to have ‘native social media productions and teams’ (IV24, 30), smaller companies have generally been able to keep pace due to the low cost and flexible nature of social media work (see Sections 2 and 4). However, this often comes at a cost in terms of the demands placed upon staff, with many across the sector expressing the view that social media is ‘an expectation of extra with less and less budget’ (IV1).

This adage of ‘more for less’ mirrors issues experienced during the rise of multiplatform production in the mid-2000s and early 2010s.¹¹ Similarly, social television presents concerns with the position of broadcasters, who ‘don’t always adhere to the terms of trade for digital’ (IV31), including exploiting content on social media platforms that they don’t own the rights to (IV13). Innovation and new revenue streams are further stifled by the lack of clarity around rights, which makes social media opportunities difficult to exploit.¹² Whilst the view of broadcasters as obstacles to rights exploitation has wide resonance, this is not a situation created by the broadcasters alone who are also recognised as key innovators in the industry’s adaptation to social (See Section 3.1). In relation to rights, many perceive the problem to be caused by a lack of synergy between broadcast frameworks and the realities of social media (IV31, 33, 57). On the one hand, broadcasters’ rights’ positions can limit content-makers’ abilities to exploit IP online, restricting clips posted to social platforms to promotional length (IV57).

⁶Ofcom. (2017). *Adults’ Media Use and Attitudes Report 2017*, p. 3. [online] Available at: https://www.ofcom.org.uk/__data/assets/pdf_file/0020/102755/adults-media-use-attitudes-2017.pdf. [Accessed 5 Feb. 2018].

⁷Google. (2017). *Connected Consumer Survey 2017*. [online] Available at: https://www.consumerbarometer.com/en/graph-builder/?question=M8&filter=country:united_kingdom [Accessed 5 Feb. 2018].

⁸Jackson, J. (2017). Children Spending More Time Online Than Watching TV For The First Time, *The Guardian*. [online] Available at: <https://www.theguardian.com/media/2016/jan/26/children-time-online-watching-tv> [Accessed 4 Feb. 2018].

⁹Ofcom. (2016). Online Overtakes TV as Kids’ Top Pastime. [online] Available here: <https://www.ofcom.org.uk/about-ofcom/latest/features-and-news/childrens-media-use> [Accessed 6 Feb. 2018].

¹⁰Ofcom. (2017). *Children and Parents: Media Use and Attitudes report 2017*, p. 75. [online] Available at: https://www.ofcom.org.uk/__data/assets/pdf_file/0020/108182/children-parents-media-use-attitudes-2017.pdf. [Accessed 5 Feb. 2018].

¹¹Bennett, J. and Strange, N. et. al. (2012). *Multiplatforming Public Service Broadcasting: The Economic and Cultural Role of UK Independents*.

¹²See Doyle, G. (2013). ‘Innovation in the Use of Digital Infrastructures’ in T. Storsul & A.H. Krumsvik (eds). *Media Innovations: A Multidisciplinary Study of Change*. pp. 111-125.



At the same time, however, amateur users are posting longer excerpts of the programme or creating and monetising spin-off content that may not be being policed by the broadcaster or YouTube, the latter because no business model has been agreed with the platform between the various rights holders (see Section 1.3).

In one example the owner of a children's TV brand identifies opportunities to build their brand, and the audience around it, by creating a huge variety of spin-off videos for social media such as craft projects based on the characters or presenters, 'walkthroughs' of games, songs from the series or 'how to' videos. However the rights are tied up in a co-production deal with a broadcaster and a distribution deal that includes rights for YouTube, which all 'becomes really complicated' (IV57). In the meantime, non-rights holders may seemingly upload (and potentially monetise) content related to the same brand with freedom and alacrity.

Collectively, barriers such as those discussed above mean that there is a structural failure within the current television industry to effectively exploit not only the potentialities of social media, but also the reality of its huge uptake by audiences: this is the opportunity gap of social television.

Indeed, the size of audiences on social media is often perceived as much as a threat as an opportunity. Social producers talk of the need to convince their TV counterparts that their work - including asking for changes in the onscreen TV programme to promote social media - is not a distraction but an enhancement of the programme or channel brand. As one experienced social producer explains,

“We are able to say “put the hashtag here”, as we are doing something cool on social. ... So I feel super confident that I can stare any TV producer in the face and ... say we do influence ratings. We are making calls to actions and are encouraging people to watch the show” (IV6).

One strategy, promoted by Twitter, which has gone some way to allaying broadcasters' fears of losing audience attention is what the former Director of Broadcast Partnerships, Dan Biddle termed the 'Tweet Spot':

“Instead of fearing split attention, think of double attention—TV producers need to find “the Tweet Spot”: OMG moments that everyone will react to and then providing the right clip/gif etc to own that moment. Great content mirrored on both screens ... if you can get that content out to the audience at the time it's happening they will re-tweet that and comment around that and share it and spread it even further”

Dan Biddle, former Director of Broadcast Partnerships, Twitter (01/03/2016).

Similarly, Twitter's UK Managing Director, Dara Nasr, argues 'when there's great programming it drives a peak of tweets, and when there are a lot of tweets about programming, it drives greater viewing on TV—there's a real reciprocal relationship'¹³.

Biddle aligns the Tweet Spot with a 'triangle of virtue': utilising one platform to amplify the reach of another, broadening and deepening audience engagement by driving them to key platforms, messages, sponsors or back to the show. Twitter's Amplify service is crucial to this. Launched in 2013 to enable publishers and creators to monetise video content on Twitter, extending TV advertising and sponsorship reach through clipping out live premium TV content (sports, red carpet events etc), to Twitter followers with accompanying pre and/or post-roll videos, display banners and branded galleries (see Section 3.2). Along with reaching both targeted users and a potentially wider social audience, this tactic can, in turn, drive viewers to the live TV coverage to increase the broadcast audience. Amplify offers publishers 70% of

¹³Bell, M. (2016). Event Report: Social Media Muscles In On TV. *Royal Television Society*. [online] Available at: <https://rts.org.uk/article/event-report-social-media-muscles-tv>. [Accessed 31 Jan. 2018].

the revenue from their video ads, with similar ad revenue share programmes on YouTube and Facebook currently offering nearer to 50%.¹⁴ An experienced digital executive producer talks of this ‘triangle of virtue’ as enabling him to develop a business strategy beyond Twitter, monetising content via social platform advertising revenue and also positively impacting on his chances of broadcast re-commissions through using a range of platforms to ‘drive people to YouTube, which is my [core] business, [and then] to drive people to engage with the show because then it might get re-commissioned’ (IV13).

A range of tactics are being successfully deployed by companies, often adopting and adapting those from other markets, including:

- **Merchandising:** “‘selling” followers as a metric for licensee’s merchandising’ (IV24), shifting a business model from ‘B to B to going direct to consumers’ (IV57);
- **Live Events:** ‘using social to sell tickets for live events’ (IV30);
- **Freemium or Data-tracking models:** ‘putting out little appetisers so people will grow an appetite for the big thing. It is about being generous’ (IV7);
- **Diversification & Niche Labels:** setting up separate labels to make social content related to TV brands and digital originals (IV31);
- **Internationalisation:** using social media to generate ‘noise’ for programme brands and build conversation with audiences as a pre-sales tactic for exploiting IP in an overseas or secondary market (IV24).

Despite such strategies, for many there is still some distance to travel if the opportunities of social media are to be effectively exploited by the television industry. Success often requires companies and producers to begin thinking about their social strategy much earlier in the process than they currently might (see Sections 2 and 3). As one experienced platform executive argues:

“Let’s say a plate (of food) is about to go to service (in a restaurant) and you think: “oh, a little bit of parsley would just set that off” . . . Too often social media is the bit of parsley at the end that someone . . . two months from TX someone has gone, “What’s our social media strategy for this?” I would argue if you’re asking that question at TX minus (two months) there’s no strategy at all” (IV9).

Such lead times are necessary because, as one interviewee argues, each solution for the integration of social media into television productions’ marketing and/or editorial work must be bespoke, being alert to individual brand values as well as the changing algorithms and priorities of the platform operators: ‘there’s no off the shelf answer’, instead requiring an analysis of client needs, platform priorities and market trends (IV27). In the following sections we examine how the success of such strategies might be measured as well as how a range of companies have adapted or emerged to capitalise on the social television landscape.

1.2 Measuring Success: ‘If it’s Shit It Sinks Like a Stone’

“That is the big question, why are you doing social media? . . . There are three things you can do generally: . . . (1) Get new viewers, so it becomes a marketing expense . . . with marketing KPIs. . . (2) Create a more loyal viewer . . . It can be much more integrated into the show and it becomes much more part of the reason why you watch the show . . . (but that’s) much harder to measure . . . (3) Make money out of it, which nobody has really entirely cracked. . . (but) good social media can do all three” (IV25).

“I am not really too bothered about (various listening or analytic tools) . . . You have just got to be creatively brilliant in social media (because) social media is wonderfully democratic in that, you know, if it is shit it sinks like a stone and if it sinks like a stone it is a total waste of everyone’s time” (IV7).

¹⁴Moses, L. (2018). As Facebook Live Video Dreams Fade, Publishers Look Again To Twitter. *Digiday UK*. [online] Available at: <https://digiday.com/media/facebook-live-video-dreams-fade-publishers-look-twitter/>. [Accessed 12 Jan. 2018].

Across over 50 interviews an abundance of different responses were given to the question 'how do you measure success' in social television. Answers largely depended on the place of social media within the organisation or production, particularly whether it is viewed as marketing or editorial (see Section 2.1.1), and which one of the 3 strategies that Interviewee 25 sets out above is prioritised. But answers also betray an awareness, and weariness, that the range of potential measures available for understanding the success of a particular social media account, strategy or experiment is dizzying. Faced with such competing measures, and businesses vying for production companies' investment in their audience insights and data analysis, one widespread response has been to promote social media as a space of creative innovation and experimentation for TV companies (see Section 3). Thus as IV7 went on to explain, whilst there are always business priorities to be aware of such as the need to reach particular demographics or ensure continuity with brand guidelines, their approach to social media has moved away from a concern with measurement and listening tools to emphasising the need to 'be creatively brilliant in social media and ... to be magnetic so people want to get involved' (IV7).

The lack of agreed and shared metrics for social is in stark contrast with well-established measures for television programmes, which have more readily adapted from the broadcast era's emphasis on overnight viewing figures to VOD and OTT services.¹⁵ The difficulties of building widely accepted social measurements are manifold, but are perhaps underpinned by the fact that 'the meaning of each online gesture is not self-evident ... not all likes are created equal'.¹⁶ Whilst it may be easy to count retweets, comments or engagements, the meaning of each may vary significantly. For example, trolling a show's social media feed has become a popular pastime of not only ordinary users, but 'celebrities' as well - with a comment or engagement from someone like Katie Hopkins often having negative value or resonance compared with one from a genuine fan (see Section 3.3). Numbers are, thus, not meaningful in and of themselves:

“As somebody told me, “Whatever my numbers are, they’ll always be good”. This is the problem with this stuff. It’s never a failure. It’s always good enough. You’ve got a choice. Because it’s not like in TV where everything is measured in ratings or in movies where you look at the Box Office ... This is really saying, “We have about ten numbers here, let’s pick the one that looks best and let’s publicise that one” (IV25).

If numbers are unreliable, they are also often unfathomable to television producers - being so small in comparison to TV ratings that social teams struggle to gain the attention of their counterparts. The reliability of quantitative metrics is further called into question by the way in which the gestures or interactions of one social media platform are increasingly realised on another platform: cross-platform syndication and single platform sign-ins, automatic software, apps and custom scripts fold the 'grammars' of one platform into another, without necessarily following the same objective or interpretation.¹⁷

Others, however, suggest the industry is embracing what appears to be an increasingly nuanced set of social media metrics that move beyond being 'just about big numbers' and place increasing emphasis on 'localisation, demographics and hitting certain markets' (IV26). For many, social media's value lies in the ability to 'target people probably easier than you can with any other media' (IV27), providing an 'immediate instantaneous granular data and feedback loop' (IV12). This shift has seen some more common or typical measures emerge that have some currency:

- Reach and engagement (IV1, 2, 7, 14, 19)
- Followers (IV23)
- Thumbs up/Thumbs down ratings on YouTube (IV12)
- Number of shares (IV25)
- Targeted demographic reach (IV9, 14, 19, 23, 40, 42).
- Views and dwell time (IV8, 9, 48)
- Sentiment analysis (IV4, 5, 23, 25)
- Referrals to programme/brand website (IV23, 25, 34, 39)
- Trending on Twitter (IV6)
- Enhancing brand reputation (IV9, 13, 18, 36)

But such measures are not without controversy. Indeed, some describe social media analytics as a 'bandit country' (IV42), with the latest scandal¹⁸ to undermine social metrics alleging the paid use of 'bot' social accounts to act as followers and even produce engagements for brands and celebrities. One common complaint is that there remains no universal or clear comparative way of counting 'views' across social media platforms: whilst Facebook requires just 3 seconds, YouTube only counts views that are 30 second or longer (IV8, 36). Moreover, each platform offers a different user experience in terms of autoplay, autoloop and whether any user action is required to 'open' a video. As others argue, the water is muddied further still by the question of whether such metrics are achieved via organic reach or paid placement.

¹⁵See Lotz, A.D. (2017). *Portals: A Treatise on Internet-Distributed Television*. Maize Books. See also Shields, M. (2018). TV Measurement is 'a Big Fat Mess' - and Billions of Dollars of Ad Revenue are at Stake, *Business Insider* [online]. Available at: <http://www.businessinsider.com/olympic-streaming-shows-data-on-digital-tv-audiences-is-hard-to-track-2018-2?IR=T>. [Accessed 12 Feb. 2018].

¹⁶van Es, K. Lopez-Coombs, N & Boeschoten, T. (2017). Towards a Reflexive Digital Data Analysis in Schäfer, M. T. & van Es, K. *The Datafied Society: Studying Culture Through Data*. Amsterdam: Amsterdam University Press, p. 177.



The latter, whilst seemingly easier to achieve, can limit the potential of future campaigns and a company's business model: as one interviewee explains, platform operators realise that if 'you have paid for it once, we want you to keep paying and all of a sudden it reduced the impact on our future posts' (IV36). Despite the concerns over the reliability of metrics, their availability can place 'unrealistic goals from TV people who don't understand [these complexities] and have a ratings mentality' (IV36), particularly when it 'is very hard to link [social metrics] back to the show' (IV25). This can not only lead to division between television and social media teams (see Section 2), but also leaves individual productions, broadcasters and companies at the behest of the social media platforms' strategies and priorities (see Section 5).

A backlash against such quantitative metrics is therefore also visible, with many placing value on more qualitative measures. For these producers, measuring success is better achieved by emphasising the immediacy of social media, reading any metrics in conjunction with overnight ratings or VOD streaming figures and their own editorial judgement. Thus some talk of how the quality of discussion on social media provides an instantaneous jury, which can be used to make immediate changes to the editorial (IV18, 20). In ethnographic work for this study we witnessed production teams, on-screen talent and executive producers checking their own devices for social media reaction and modulating their performance or strategy as a consequence (FN 02/04/16 and 13/11/16). Indeed, this use of audience reaction is de rigueur for 'native' social media talent, such as successful YouTubers, who do not understand waiting for metrics but instead respond to the impression left by comments on their videos as immediately as possible (IV12).

And as this quote illustrates, the demand for qualitative research around audience activities on social is growing within the screen industries:

“Social media metrics provide granular detail but little insight as to what audience activities might actually mean. Many BSAC members are increasingly interested in qualitative research into how to understand the value and behaviours of audiences’ social media activities”

Pete Johnson, Chief Executive of British Screen Advisory Council (08/02/2018).

Given the difficulty with metrics, for many the measure of success for using social television returns simply to the inescapable importance of social media in viewers' everyday experiences: focusing on ensuring visibility 'where people are' and making that presence as strong and creatively engagingly as possible. Thus interviewees discuss raising brand awareness, ensuring longevity and legacy after TX and emphasising creativity: '[we] make sure that every bit of our content is really strong, as if it's the last we ever do' (IV36). Most frequently, interviewees return time and again to the importance of creative risk in understanding the value of social media to their strategies and business models: 'The great thing is when you own the distribution line it means that you get to experiment because you ... just try stuff out. You see what works. But you don't have to go and explain yourself to anyone' (IV13). As this senior executive goes on to explain, the value of such experimentation to his business model is crucial because - compared to the broadcast era - it is much easier to own the whole production pipeline and derive revenues from across the value network (IV13). In such a view, the fact that financial returns may be relatively small or uncertain is offset by low barriers to entry, the opportunities for developing new relationships with audiences and building new products and services with potentially high rewards (see Sections 1.3 and 3).

The opportunity to take creative risks and to ensure brand legacy and engagement with audiences also leads to a strong emphasis being placed on 'professional reward' as a measure of success in such work (IV1, 32, 33, 36, 38). Interviewees speak of checking accounts 'first thing in the morning' (IV32), on a 'day off or outside work just [to see] what's going on' (IV33). We explore the question of where and how such work takes place in Section 4.2, but many speak of the instantaneous feedback as rewarding, making it possible to 'genuinely see if an audience has reacted to this or not, is it something they've engaged with, shared, talked about or has it just sunk?' (IV48). One senior executive's experience of getting 'on the wrong train, and ending up in East Grinstead at 1am because I was so obsessed with the Twitter feed' (IV1) reflects a wider experience in the production sector of finding social media work and feedback 'addictive' (IV32, 33).

¹⁷Gerlitz, C & Reider, B. (2015). *Tweets Are Not Created Equal. The Politics of Platform Metrics. Manuscript.*

¹⁸Nicholas, C., Dance, G., Harris, R. and Hansen, M. (2018). *The Follower Factory, The New York Times.* [online] Available at: <https://www.nytimes.com/interactive/2018/01/27/technology/social-media-bots.html>. [Accessed 17 Jan. 2018].

Case Study:
The Digital Content Studio and Broadcaster -
Little Dot Studios

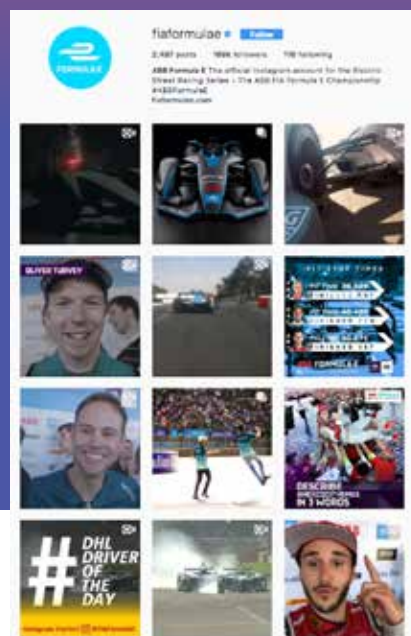
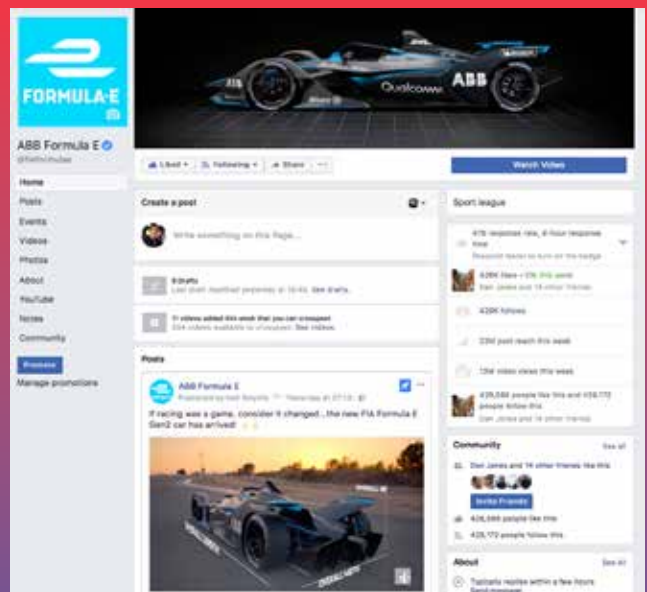
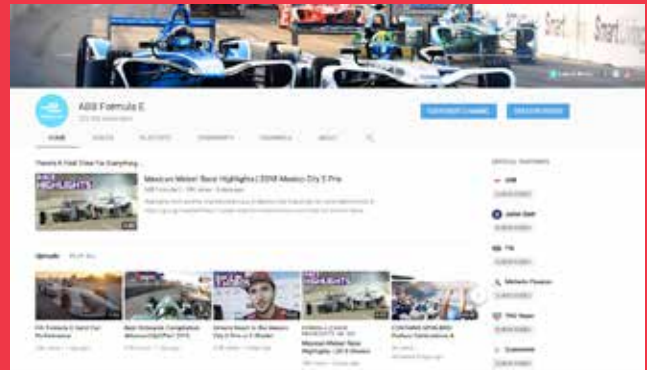
Little Dot Studios is a digital content studio and broadcaster, producing original and brand funded content, as well as distributing and monetising new and existing video content across all social platforms.

Achieving over 2.5 billion views per month across the broadcast and sports content it manages, Little Dot Studios run YouTube channels and Facebook pages in multiple genres for broadcasters, independent producers and distributors, brands, talent, and sports rights holders. The company fuses marketing and data insights with editorial by distributing and producing video content for use across multiple platforms - including utilizing and repurposing existing content and producing and developing new content and programming for broadcasters and digital and OTT platforms in the UK, US, Germany and Latin America.

Wayne Davison, Little Dot Studios' Managing Director, Content Acquisition & Distribution, explains that 'content on social is central to how our business operates, particularly YouTube and Facebook. We started in 2013 working with TV producers and content owners who didn't want to invest in building teams and fundamentally didn't understand YouTube as a platform. And more specifically we saw an opportunity to make money from it' (25/04/2017). Little Dot Studios' evolution coincided with YouTube's search for premium content partners, 'so we wedged ourselves in between both to bridge that gap, creating a team of experts, building YouTube channels, Facebook pages and managing brands on the platform to plan, monetise, track and block where necessary'.

The company generates revenues for partners from advertising, by re-animating rights-holders' archives, managing content and optimising channels on YouTube and pages on Facebook and reaching audiences across platforms. It provides television companies, distributors and broadcasters data and insights around audience use to enable rights holders to develop or sell content into new territories.

As Davison sums up, 'our work with content on social platforms can also help feed into the more traditional processes with broadcast and distribution'.



Indeed, it is often the public service aspect of this work that encourages social television professionals to continue with audience engagement long after normal hours have ended. For example, some measure success by whether it is possible to see 'minds changed' on social media about divisive social issues or that a quality of debate and engagement has taken place around a programme (IV1). Across many interviewees we find a concern with the ethos and ethics of public service broadcasting (see Section 3.3 and 5.1), which plays out in how workers in a variety of roles for different broadcasters understand their own work and its relative success (IV1, 2, 12, 18, 42, 57). This often relates to a concern to 'make a difference' in viewers/users' lives, which reflects the significant role that independent production companies - television and digital - make to the UK's unique public service broadcasting culture and economics.¹⁹ In turn, different metrics are enlisted by those seeking to understand the public service value of social media, including an emphasis on engaging underserved audiences, and tracking 'relative engagement', which attempts to understand how many of 'every 100 people reached on social ... then did something' (IV18). However, the role of social media in public service broadcasting presents a series of quandaries for the broadcasters, including how they measure success when their remits might often sit in tension with the priorities of platform operators; for example, PSBs' need to prioritise UK-engagements and 'own' their relationships with audiences directly (IV42). The different expectations, and regulations, of UK broadcasters compared to the US social media platform operators places UK producers under a higher standard of editorial compliance that can exacerbate this tension. But such skills and ethics might also be productively harnessed in collaboration between broadcasters, production sector and platform operators within the evolving social television landscape to create experiences that audiences can have greater trust and engagement with (see Section 5). The BBC's 2017 promise to work with social media platforms to address the challenge of Fake News is particularly important in this regard, but such issues of reliability extend well beyond news and journalism.²⁰

Metrics are thus a more complex area than many first perceive. In such a landscape, notions of creativity, quality and innovation remain important fallbacks for those working in the sector to understand success in social TV (see Section 3.2). Although the potential size of audiences, engagement tactics, return on investment and standardised metrics remain unclear, a number of companies have been able to develop successful business models.

1.3 Business Models

“ I don't see the inexorable decline of the visual storytelling business (as people watch less Telly) ... people are watching more video, seeing more stories than ever. But how they exist or how long they are is up for grabs now. That's the really exciting bit. ... You don't have to have it on at this time. It can be super niche. It's really exciting but we need to change our business models to be able to do that ” (IV13).

“ Increasingly (social media) is where our audiences are going. So unless you're there working in that space, understanding that space and you get in early to that space (pause) well, that's where your core business is going isn't it? ... ” (IV31).

Depending on which statistics one wishes to believe, commission or purchase, audiences are either watching less television or they are watching more television and television-like experiences on an increasing variety of platforms and devices. In either scenario, social media is an important part of television's future. Despite, or perhaps because of, the difficulties with measuring audiences and gauging relative success, a range of companies have emerged to exploit the opportunity gap that exists in the spaces between television and social media production strategies, finances and audiences to build new revenue streams and successful business models. The companies we profile in this section often fuse staff from television and digital or social media backgrounds to create hybrid approaches that mix content creation with data analysis, constant audience engagement with carefully pre-scripted and scheduled content, editorial with marketing functions of social media (see Section 2).

Some companies have adapted from their broadcast era models, placing increasing emphasis on social within their business. For companies like Somethin' Else, moving increasingly into social media has made sense because 'it overlaps with our core existing disciplines: TV/Video and Radio/Audio' becoming a discipline of its own right within the company. As Steve Ackerman (Managing Director) related, 'social media now accounts for about 15% of the business which five years ago, would have been probably 3 or 4%. But it's also massively growing'.

¹⁹Bennett, J. and Strange, N. et. al. (2012). *Multipatforming Public Service Broadcasting: The Economic and Cultural Role of UK Independents*.

²⁰BBC. (2017) BBC Annual Report and Accounts 2016/17, p. 15. [online] Available at: <https://www.bbc.co.uk/annualreport> [Accessed 05 Mar. 2018].

Other companies are 'born social', developing an agency model to service television companies and broadcasters' brands across social platforms, such as LiveWire Sport, Social Life and That Lot. Such agencies help reach youth audiences on social platforms (Social Life), produce short form content and rights management for kids (Wild Brain), create real time content for live events (LiveWire Sport) and develop tone of voice for brands that speak to audiences in the immediacy and intimacy of online spaces (That Lot). They often work on a retainer model with broadcasters or production companies (IV4, 5, 7, 23), generating 'noise' for programme or channel brands and starting conversations with audiences that build active, engaged and loyal followings. Increasingly these agencies are attempting to create relationships that swim 'higher up the food chain' to become involved in content production and IP creation (IV24), rather than being viewed simply as outsourced marketing work (see 2.1.2).

One area identified by many as ripe for exploitation is archive, although television companies are often unsure how to go about monetising it effectively (IV2, 13, 47). YouTube is especially significant in this regard for its Content ID service, which allows the platform to match content owners' IP on the platform with uploaded clips and apply a range of given rules to it. As Ben McOwen Wilson (YouTube's Regional Director, EMEA) explains, YouTube operates a three tier policy - (1) block; (2) track; (3) monetise:

“Content ID operates territory by territory, so you can set one of the three policies. You can either block that content ... (for example) movie studios don't want a film being made freely available ... The second tier of policy is track: you can leave that content up to see where it's being consumed. If you're an independent producer that might be valuable to you because you don't own the rights to monetise that content, so you can't sell or place advertising against it, but you do want to know where else it's being viewed, because you might want go and try and sell it as a new product there. ... Then the third tier of policies, is that you turn on advertising around your content”

Ben McOwen Wilson, Regional Director EMEA, YouTube (05/08/2017).

Content ID's tiered possibilities are, according to some interviewees, helping rights holders take a more relaxed view of sharing on social media - allowing the sharing of short clips between fans of a show and facilitating communities of interest around these. As McOwen Wilson states, it's 'not just YouTube that has created [this culture], it's technology that has created that. What we've done with Content ID is build a platform that allows rights holders to take control of that process'.

Other business models being experimented with include:

- The sharing model: Using profit-share of ad-revenue from social platforms to incentivise freelance producers to grow followings and traffic associated with a specific programme or channel brand (IV13);
- The talent first model: Developing on-screen talent by using social platforms as a training ground or space of experimentation that builds a personality's profile and following, which can then be exploited via IP-based formats on other platforms that YouTubers would struggle to shoot or develop themselves (IV12);
- The long view model: Building social destinations to promote a show by creating bespoke content, funded via the small revenues from YouTube ads, which builds a larger audience for a product that can eventually be monetised via merchandising and products (IV57);
- The new game in town model: 6 companies responding to our Pact surveys gave examples of commissions coming directly from platform operators, such as Facebook Live, Mashable and YouTube. However, such commissions are unlikely, at least for now, to directly fund new content. Instead platform owners 'offer up an equivalent ... marketing spend around ad credit for that content ... the original content money comes from either brands or it is funded internally by production companies' (IV30).

Business models and return on investment for social television production remains too uncertain for many to make significant investment - viewing social media as temporary and ephemeral: great for engaging 'with people on those platforms but will have no [lasting] value (unlike broadcast TV)' (IV24). Such a view, however, would have consigned early television to the dustbin of history: the TV industry has embraced ephemerality and temporality as the medium's USP, building successful business models around these very facets. Grabbing short bursts of attention within the incessant flows of social media content is thus an adaptation that many working in this space are ready to make - closing the opportunity gap and developing business models that demonstrate social television production can be monetised successfully.

Case Study: The Social Media Agency - That Lot

That Lot provides social media content and strategy for brands and broadcasters. Their services include copy writing, image and video production as well as social broadcasting, streaming content to audiences globally.

Schneider's background in television, as writer, director, comedian and actor, is complemented by Levin's in social media, where he developed a client base after the spoof Twitter account he ran for his local pub, @the_dolphin_pub, attracted a cult following and was named *Time Out's* 'Best London Tweeter' in 2011. Along with building significant followings for their personal social accounts, which serve 'as advertisements for our work' (Schneider, Interview 15/1/2016), their agency was awarded the UK Social Media Communications Award for Best Large Agency 2016 and currently numbers around 50-55 staff, including about 15 in the video department, 15 account managers and strategists, 15 creatives and 6 designers.

A particular expertise is in developing tone of voice for brands on social and, in the case of their TV work, this can go on to impact on the shows themselves - 'the writers of the show say they've been heavily influenced by the tone of social. The tone used to be different, more serious but the tone of social media is more playful and now that's bled into the show' (Levin, Interview 15/1/2016). Their work is also having a visual impact on certain TV programmes, such as *The Voice* and *The Last Leg*, wherein 'social media memes are now going into the show's VTs and so there are literally bits in the show that look like the social account' (Levin, 15/1/2016).

Often working on a retainer basis for broadcasters, members of the That Lot team have also plugged into in-house and/or independent TV production teams on projects such as *The Apprentice* and *The Voice*. They succeeded in turning E4, Channel 4 and All4 into the first, second and fourth biggest UK broadcasters on Facebook in 2017.



David Schneider, Co-Founder



David Levin, Co-Founder

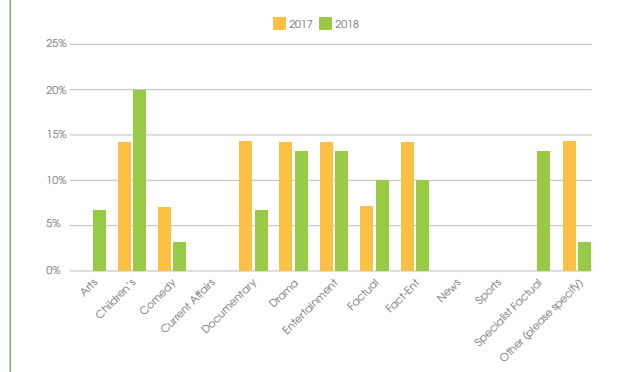
Section 2: Making It Social: The Production Practices of Social Media for Television

Many TV executives and producers wish to know how to make 'good' social, how to make it 'go viral' or how to get return on their investment (ROI) in social media. Whilst there is no magic formula to answer such questions, there are some commonalities emerging around 'where', organisationally, effective and impactful social television is produced, what is produced and when it is posted. Where to place social television production lies at a tension point between marketing and editorial as well as between integrated or outsourced teams (see Case Study: Humans). Solutions that adopt hybrid approaches might be the most successful in addressing the opportunity gaps of social television.

Genre has a large impact on where and when social television is produced, with budgets playing a significant role on what is produced. Entertainment and Drama have 'much more expansive budgets [that] can afford to bring bespoke people in who can put together packages, whereas something in the Factual sphere just doesn't have spare money to do that' (IV43). Entertainment shows are especially likely to attract such investment; for example, one primetime shiny floor social media team we observed included 6 dedicated staff members whilst another social producer suggested live finals might have a digital team of up to 20 (IV35; FN 12/11/16). Budgets tend to favour live programming, but some Drama producers note that productions have 'started putting in a line for social media' (IV30). However, Drama can be difficult to produce social for because 'you don't have a magical digital budget [yet have to make] really good quality on a tenth of the money' with social productions expected to adhere to the brand values of the programme itself (IV31). Budgets are often remarked upon as larger for productions that experiment with new technology in social - such as VR, AR, AI or 360 film (IV6) - or brands that target youth demographics (IV6, 30), such as music programming (IV31). Children's budgets, however, remain tight with social media work likely to be folded into existing roles. This is in line with the wider sector, where the content created for social television is often 'quite low budget in relation to TV shows' (IV13, 30, 57). Indeed, the level of budget investment leads to some concerns as to whether the UK can retain its status as a world leader in social television innovation (see Sections 3 and 6).

Budget size has, in turn, a large impact on a genre's social television revenue potential and production practices. Those working in Entertainment, Drama and Children's genres are substantially more likely to be making revenue from social media than those working in Factual genres (Figure 2: social revenue against genre). As many commented, 'Entertainment lends itself massively [to social], particularly big talent shows' (IV6, 13, 25, 31). The genre's emphasis on liveness and reliance on a strong audience relationship hark back to earlier forms of Light Entertainment and music hall origins, making it 'built

FIGURE 2:
New Revenue By Genre (%) 2016-17 Comparison



with interactivity in mind' (IV25). In contrast, Factual and Documentary programmes can be 'trickier for social', where production (and transmission) is less likely to be live and a range of compliance and ethical issues are faced around vulnerable contributors (see Section 3.3). For Children's, particularly pre-school and early years, social television means predominantly engaging with parents on social platforms. Here, despite the paucity of budgets on offer, the genre's production practices provide the opportunity to both build communities and monetise the brand via merchandising and brand extensions (IV57). For Drama, social media can provide space for narrative extension or native 'social media storytelling' that enables a programme brand to live all year round and provide revenue opportunities in advertising against bespoke short-form content, games and merchandise (see Section 3.1).

Regardless of genre there is significant difference in which platforms are being used by revenue-generators compared to the wider industry. Unsurprisingly, both our 2016 and 2017 surveys reveal revenue-generators to be much heavier users of almost all social platforms, with Twitter the most commonly used platform for both TV productions and company promotions. However, revenue-generators are also more likely to use those platforms or services that innovate in how or which audiences they reach, particularly in relation to youth audiences. For example, we surveyed companies' use of 13 different social media platforms as part of their television productions. Revenue-generators' frequent use of platforms outstripped non revenue-generators on all but the four major platforms, Facebook, Twitter, YouTube and Instagram, where use was roughly equal. However, there was significantly greater propensity to use more diverse or new platforms by revenue-generators, such as WhatsApp, Vimeo, Facebook Live. These trends repeated our findings from 2016, where now-defunct platforms like Vine were

“ Not all programmes are born socially equal, sometimes (social is) a waste of time ” (IV13).

used frequently by 20% of revenue generators, compared to just 4% of the wider industry. This suggests that revenue-generators are more likely to try new platforms and services, experiment and persist in their use - perhaps even where the business model or return is less certain.

The case of Snapchat is particularly significant for understanding the implications of these trends, which sees revenue-generators' use of the platform as double that of the wider industry in each survey year, with 40% of revenue-generators using Snapchat 'Sometimes' or 'Often' in 2017, up from 25% in 2016. Conversely usage of Snapchat in the wider industry reveals a reverse trend, falling from 10% of respondents in 2016 to 9% in 2017. Given the platform skews towards a youth demographic whose use of social media platforms will shape future strategies across the television industry, it is perhaps concerning to find that 91% of non-revenue generators reported 'never' using Snapchat in 2017, up from 81% in 2016. At the same time, youth audiences' use of the platform is growing rapidly: in 2017 32% of 12-15 year olds viewed Snapchat as their main profile, more than double the number from 2016, whilst there has been a corresponding decline in Facebook as this age group's main social media profile (down from 52% in 2016 to 40% in 2017).²¹

Worryingly, for the UK production sector, the trend of companies' low usage of youth-orientated platforms extends to YouTube, which is perceived by 12-15 year olds as the content brand they would 'miss the most', whilst both 8-11s and 12-15s are 'also more likely to say they prefer watching YouTube to TV programmes on a TV set'.²² Only 57% of non-revenue generators 'Sometimes' or 'Often' use the platform in 2017 for TV productions, compared to 70% of revenue generators. This suggests that only a small proportion of the industry are well-placed to exploit the opportunity gap of emergent audience practices in social television. Put bluntly, an industry where 84% of companies surveyed (2017) report they 'Never' use Snapchat, the platform that is most heavily used by youth audiences, needs to more actively consider how to creatively and commercially exploit such platforms (see Snapchat Case Study Section 5).

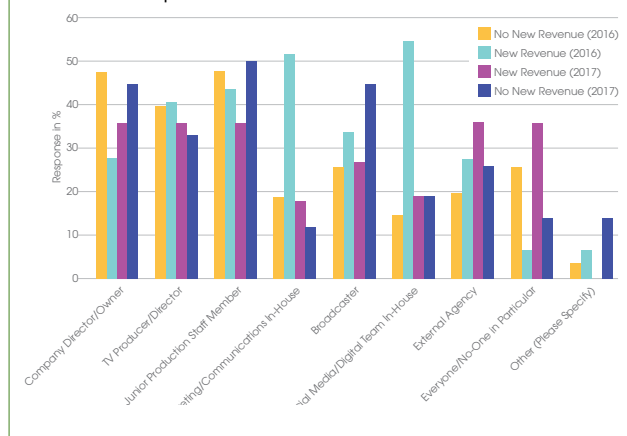
Planning social media activations means being attuned and responsive to the (changing) strategic and technical developments of platform operators - demanding both considerable knowledge and skill in social media, but also revealing new power dynamics and risks emerging in the television industry in the era of social TV.

2.1 The Place of Social Media in TV Production

Of the 30 companies reporting new revenues from social media in 2016, more than 50% utilise in-house marcomms or social/digital media teams, compared with just over 15% of the wider sector (Figure 2.1: who does social).

Whilst our 2017 survey reveals the use of in-house teams was down to 20% in revenue-generators, with work spread more widely across company teams, it continues to be the case that those willing or able to invest more in social media are likelier to see returns. Such investment may be fruitfully directed at outsourced as well as in-house teams so long as there is a high level of integration between social and TV production teams.

FIGURE 2.1:
Who undertakes SM Work for TV productions within companies?



84% 

OF COMPANIES SURVEYED (2017)
REPORT THEY 'NEVER' USE SNAPCHAT

²¹Ofcom. (2017). *Children and Parents: Media Use and Attitudes Report 2017*. p. 4. [online] Available here: https://www.ofcom.org.uk/_data/assets/pdf_file/0020/108182/children-parents-media-use-attitudes-2017.pdf. [Accessed 15 Feb. 2018].

²²Ibid, p. 9.

Importantly, investment in social is not necessarily linked to size of company, but is more likely to be linked to who is entrusted to do the work. In 2016 over 50% of companies making money from social tended to be small to medium-sized, rather than micro (less than 10 employees), and turning over £5m+ (with 30% in excess of £10m). However by 2017, there was no statistical significance in size of company in relation to social revenue streams. What remains true of revenue-generators is their unwillingness to entrust social media work purely to junior staff: in both 2016 and 2017, 50% of non-revenue companies report using junior staff, compared to just 36% of revenue-generators. The training of such staff also differs significantly (see Section 4). Nevertheless, we have undoubtedly witnessed some democratisation of social media production in successful companies: social media work is split equally between company directors/owners, producers/directors, junior staff – with a much greater propensity for revenue-generators in 2017 to report that such work is undertaken by ‘everyone/no-one in particular’ than in 2016 (up from 6.9% to 36%).

Whilst the work of social television production may be spread across teams and organisations, its place and role within the production set up is vexed: spanning both editorial and marketing functions that bring with them questions of how best to find the right expertise to be successful.

2.1.1 Marketing, Editorial or Both?

“There is always a question: “Is social media marketing or editorial?” Without both it’s neither” (IV9).

Social Media teams are housed in a range of ways within the broadcast organisations examined in this study – BBC, ITV and Channel 4. Whilst ITV’s social team is currently located in their Online, Pay and Interactive division, at the BBC and Channel 4 social has moved from a variety of locations, including from within multiplatform or digital teams to, in Channel 4’s case, become housed strategically and organisationally within their marketing department (IV7, 19). Within the BBC, social media is governed within a number of vertical divisions, from Radio/Music to News and Children’s, with the core portfolio accounts in the TV division housed within a ‘Content Social team’ which supports both Marketing and Editorial (channel and commissioning teams). Following a strategic drive to streamline (and thereby maximise resources and impact) the broadcast logic generally appears to be avoiding the creation of ‘loads of accounts to mainly have channel accounts run by marketing’ (IV14).

However, this logic may result in social media’s absence from the ideas development phase of programming (IV36, 41, 42, 48, 55). As some interviewees complain, ‘marketing departments [are] taking over social media ... that is the worst thing that has ever happened, because

having an editorial facility is really key, even though you are essentially marketing, it is very different ... [pure marketing] doesn’t work very well’ (IV36). This Executive Producer’s difficulty in ‘placing’ social media work as editorial but also ‘essentially marketing’ is arguably a key conundrum for television production. As another explains, ‘the ROI, which is always the question, is brand awareness, it’s brand loyalty’. But it is also ‘an emotional connection: it’s putting more content into harder to reach audiences’ (IV9).

If social television production work, budgets and teams lie within marketing departments, many believe this inhibits programme commissioners and makers from thinking deeply about the creative possibilities of social. As one senior executive explains, not many television production teams will ‘understand the importance of community management or think of themselves as a service above and beyond a television show’ (IV42; see Section 4). For this producer, the ‘challenge lies in television needing to know how to add value to audiences of social, as opposed to simply trying to compete for attention, simply trying to be another shiny item in somebody’s feed’. For another, the barriers are ‘at a Commissioner level ... a lack of vision or ... not understanding the value’. For him, finding TV Commissioners that understand [social] is difficult because ‘they just watch telly ... [Social is] the duck’s feet going under the surface’ (IV55).

Despite such criticisms, there are compelling reasons for television executives to be cautious about how and where they invest in social. For example, community building also carries significant risks when aligned to the economy of television, where programme brands can shift channel, such as *The Voice’s* move from BBC to ITV in 2017 or *The Great British Bake Off’s* move from BBC to Channel 4, also in 2017. Such moves raise questions of community ownership, management and value in the format sale that remain unclear. As one interviewee cautions, failing to agree rights or consider the value of such assets can lead to a ‘scorched earth’ approach to the brand’s community development, with the new brand owner needing to start from scratch on social and audiences left adrift (IV13).

Social television has arguably been most successful where marketing and editorial are fused:

“The role that social has to play is a middle ground between the editorial team and the marketing team ... in effect lots of social content created around TV shows really is marketing content but it’s coming out of an editorial place” (IV48).

This senior executive goes on to detail an example of such fusion around a primetime entertainment show. The production team had commissioned their digital agency to produce the social experience around the programme. During development, the digital agency was introduced to the broadcaster’s marketing team

who connected the agency to the show's sponsor who, in turn, provided ancillary budget to extend the social experience. The result was an 'ongoing relationship with the audience' for the broadcaster and, for the sponsor, 'greater engagement with the product'. The convergence of editorial and marketing enabled them to:

“ Flip the power from the broadcaster to the audience ... rather than us telling you when you'll talk about our product or be interested in it, we'll make sure we're relevant to you at the times that are important to you whether that's two days after the event or during it ”
(IV48).

As he describes, whilst this might seem 'a logical progression' of developing 'one brief that's got its subsections' across broadcaster and sponsor requirements, this was 'the first time' it had happened for their long-established digital agency. Conversely, others relate examples where a broadcaster's marketing team has sold separate sponsorship packages for television and social around live events that lead to incoherent and frustrating experiences for audiences, producers and sponsors alike. One interviewee speaks of how commonly 'sponsorship comes up very late in the conversation, and obviously to try and create digital assets you need the time. Very often a programme is shot and edited by the time we get a sponsor so it was really tricky to manage that process' (IV38).

Like much of the history of television production we explore in the wider ADAPT project, this phase of social television emphasises that the medium's hybridity must be embraced in production to be successful. As set out in Section 1, this involves television garnering a better understanding of social but, as others reflect, marketers also need to better understand the relationship between television and social. 'Social is a new discipline for many people in marketing' (IV18) requiring a 'change in approach to valuing social media skills more in marketing teams', such as understanding that on-air and social trails require overlapping but distinct approaches (IV10). Ultimately, given the realities of production and the increasing squeeze on budgets, one interviewees' advice is worth heeding across the sector: 'For a successful social media campaign to work it has to be tied in with what the channel are already doing in their marketing and PR' (IV30), as was the case with *Humans* (see Case Study).²³

²³AJ Christian usefully examines how the practice of mixing editorial with marketing is the bread and butter of 'native' social television producers in his study of 'Open Television': Christian, A. (2018). *Open TV: Innovation Beyond Hollywood and the Rise of Web Television*. New York: NYU Press, esp. pp. 79-84.



Case Study:
Humans: Fusing editorial and marketing for
social storytelling

Humans (Channel 4) explores a near future in which ‘Synths’ combine robotics and AI to offer a near-human servant experience. Awarded the 2016 BAFTA for digital creativity for its social media experience, *Humans*’ digital project moved beyond a mere marketing campaign around the television drama to combined real world, television and social media platforms to offer audiences an experience that took them into the *Humans* world. The project fused editorial and marketing, being launched in the run up to TX by 4Creative without any Channel 4 branding. Synths thus appeared as if they were a real world product from company, Persona Synthetics²⁴, that would soon be available for consumers to purchase. As 4Creative’s Christos Savvides²⁵ explains, the *Humans* digital project ‘created social accounts with product information and ... secured a shop front in Regent St for some “Coming Soon” hoarding’ that featured ‘two 90” screens ... where 3D models of synths’ were powered by Microsoft Kinect motion tracking technology to enable them to interact with passers by. This campaign featured the hashtag #humans that pushed audiences ‘to a destination website, closing the loop and revealing that this had all been promo material for *Humans*’.

Karolyn Holbon, Director of Online Video Content, Endemol Shine UK, recalls that the success of the *Humans* digital project owed heavily to the relationship between the Digital Producer working within Kudos (an Endemol Shine production label in the UK) and Channel 4’s marketing team from the outset, enabling them to ‘pick up the mantle from the Channel 4 team and run with it across the whole series’. Her central digital team at the time ran Twitter and Facebook accounts that maintained the Persona Synthetics brand as if was a ‘real company ... keeping up the conversation across the whole series’ by repurposing the whole suite of ‘assets that had been created for the marketing campaign ... [to broker] massive engagement’. This included tying the social strategy to narratives across the series, such as a ‘fake hacking’ of the social accounts by an ‘Anti-Synth’ group from the programme world, which generated further media and audience attention.



Beyond the nominations and awards for digital innovation, *Humans* digital project delivered real return on investment that was recognised by Channel 4’s CEO David Abraham as being responsible for a ‘surge of viewing figures’, making it the broadcaster’s highest rated drama in 20 years. The professional reward of experimenting with the social platforms led to Channel 4 commissioning a ‘behind the scenes’ video from the same Digital Team, that fed the audience’s demand for ‘extra content alongside the drama... and became the most watched video on All4 of 2015’ (Holbon, 08/08/2016).



²⁴See <http://www.personasynthetics.com/productrecall/>.

²⁵Savvides, C. (2015). *Humans* - Persona Synthetics. [online] Available at: <http://www.christos-savvides.co.uk/works/humans-persona-synthetics/>. [Accessed 15 Feb. 2018].

2.1.2 Integration vs Outsourcing: The Challenge of Adaptation

“I don’t see the value I am building in having my own social team because you don’t retain IP anyway. So, it’s not a business model I’m worried to farm out” (IV31).

“It used to be no social media at beginning of productions, it was literally the week before TX ... over last few years (there has been) a radical change in production to include social media from day one” (IV23).

The quotes above are indicative of two trends in the industry that represent divergent approaches to the role of social in television: those that outsource and those that increasingly embed in-house. Over the past 5 years company organisational structures, production processes and workflows have adapted to social television production (IV4, 5, 9, 14, 22, 28, 39). But working out where social media fits within companies’ established protocols continues to be a complicated and, at times painful, process (IV3, 7, 31, 35, 48, 49). As one producer explains:

“In the past social media was treated like the kind of poor brother ... As soon as it starts getting big then everyone starts getting interested. I still think there is a misunderstanding of what that resource costs and that you can’t just get your assistant to tweet along with the show ... that’s the voice of the show going out to the public. And that takes someone with experience” (IV31).

As another social media producer explains, this isn’t ignorance or a failing of television producers per se, but relates to the fast-paced change in social media and the set of specific skills required to harness the various platforms effectively:

“There’s still a massive hurdle for people who come from a TV background to really embrace the potential of social platforms. Because social platforms are constantly evolving. So “short form” is one thing that they could really understand. Now you’ve got Facebook Live, 360, stories on Snapchat.

You’ve also got the fact that you can now take interactive narrative and interactive video into Instagram. It’s just that stuff is so far away from their comprehension, so you may as well be talking a different language” (IV40)

Given such difficulties and complexities it is perhaps unsurprising that our surveys demonstrate an increase in outsourcing both company and production-related social media to external agencies: outsourcing of TV production work is up from 22% in 2016 to 28% across the sector, although steady at 28% of those making new revenue. Outsourcing of company social media work is up from 10% to 18% (including 21% of companies deriving new revenue, up from 10%).

The move to outsourcing reflects the need for specialised skills in social television production (see Section 4). At the same time, the growing importance of social to viewers’ experiences has meant that television producers, broadcasters and companies are increasingly thinking about how to integrate social into their programme experiences and productions. A range of interviewees discuss how social has moved from being a ‘forgotten’, ‘unimportant’ or ‘bolt on’ television production component or even a ‘dirty word’ (IV3, 14, 39) to being ‘constantly ask[ed] for’.

One of the most challenging aspects of integrating social media into television remains the alignment of conflicting production timelines or, as one interviewee paraphrased a conversation with a TV exec: ‘it’s great you’re asking for things but, just as an education, we can’t deliver you an app in two weeks’ (IV35). If social requires extensive pre-planning, it also requires extensive legacy (IV31, 35, 48, 49): ‘Social media needs feeding months and months after they (TV producers) have probably delivered and paid for the programme ... and are on to the next thing’ (IV38), meaning there is often ‘no one around to do it’ aside from Execs who sometimes oblige but aren’t necessarily ‘the people who know the show’ (IV13). At its worst, such a process exposes workers, often production management or junior staff, who happen to be ‘still around’ mopping up, to additional ‘stress of taking on’ social content production at TX because ‘that’s the point the broadcaster starts thinking about it, relying on the goodwill of people that are interested in the stuff but asking them to do it in their personal time or unpaid’ (IV43). In such circumstances, outsourcing can make commercial sense and, indeed, can produce creatively and economically powerful results, where ongoing relationships are built between television and social companies (see Section 1.3).

Successful integration is therefore perhaps best considered at the level of strategic thinking and planning, rather than the make-up of individual teams - with social television work increasingly forming part of hybrid or 'slash' roles within productions (see Section 4). For example, the BBC's production of *The Voice* outsourced marketing function to That Lot whilst TV production company Wall to Wall used Warner Brothers Digital for the production of social. Yet across these companies interviewees spoke of building a closer and closer relationship over five years: 'the digital team has the relationship with the talent and the TV team ... [to] film stuff on the TV cameras for digital ... and [the TV team] will also use it in the shows. It's very integrated' (IV14). In a reverse example, interviewees spoke of integrating social television production roles into crew contracts for *Planet Earth II* (BBC, 2016) that required them to capture 'behind the scenes' and 'making of' footage for social platforms. This led to the team capturing the amazing moment a Komodo Dragon invaded one of the crew's hotel bathroom, which was then viewed by over 1m people on its YouTube channel: *Planet Earth Unplugged* (IV39). Integration in both cases enables a coherent tone of voice over television and social media channels (IV14).

Across interviews there is a growing agreement as to 'the pay off' whereas before 'it was a pat on the head and, "yes, we'll get something for social". We were the lowest of the lowest of the low. Now we're a bit more cool' (IV22). Discussing her role as a digital exec embedded in a television production team working on a prime time TV 'shiny floor' show, one interviewee tells of how such integration enables her to have a holistic view and 'a very rich understanding of the content' enabling increased audience engagement (IV20). Another interviewee tells of how close integration enables teasing and trailing content that includes key characters, cast members or plotlines to build and maintain audience loyalty via social media between TV episodes and series whilst 'avoiding spoilers' (IV39).

Fundamentally those pursuing integration of social media within television production look for ROI that emphasises brand awareness, loyalty, emotional connection, legacy after TX, and driving content to harder to reach audiences (see Section 1.2). This requires careful consideration of what, where and when social interactions take place.

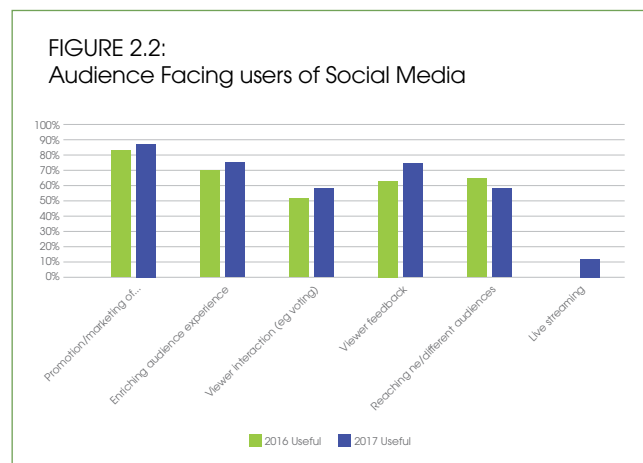
2.2 Planning Social Interactions: What Goes Where, When?

What:

“ A few years from now, the vast majority of the content that people will consume online will be video ”

Mark Zuckerberg, Co-Founder, Chair and CEO
Facebook, Mobile World Congress, Barcelona 2016.

Promotion, audience engagement and community building remain at the heart of 'audience facing' uses of social media in television productions (see Section 3.2 for 'production facing' uses of social media). Our annual surveys unsurprisingly reveal promotion and marketing is by far the most common function of social media within television productions, with 96% (2016) and 94% (2017) rating it as 'Occasionally' to 'Extremely Useful'



However, the survey also shows a growth in nearly all audience facing uses of social media, suggesting it is becoming a more commonplace part of television production. Enriching audience experience is the next most common use (up from 89% to 94%), with only viewer interaction, such as voting, showing a slight decrease from 74% to 71%. This survey data reveals social media for television is predominantly conceived of as a communications channel with audiences, with a

significant proportion of new experiences and content forms being experimented and innovated with in this space (see Section 3). A significant change in our survey from 2016 to 2017 was the inclusion of live streaming as a category, which showed 56% of respondents making use of this growing tool. It is intriguing that this use of social media lags significantly behind that of the other categories, especially given how important live streaming is becoming for social platform operators' current business strategies (see Section 5).

Other noteworthy changes are an increasing emphasis on video production and also the development of distinctive tones of voice by programme and channel brands. As one broadcasting senior exec sums up, prior to 2016 channel social media feeds were 'basically TV guide Illustrated by on-air trails' (IV7). At the same time a growing understanding of the ways that platforms work, particularly the strategic prioritisation of video by Facebook, Twitter and Instagram²⁶ as well as the audience behaviours around them now informs bespoke strategies for individual platforms. This is underpinned by a consensus that 'making good content for social audiences, [rather than] just repurposed TV content into short form' (IV10) 'will attract ten times the impressions than for example just a tweet' (IV9, 30, 33). In fact, some estimates suggest that social video generates 1200% more shares than text and images combined, with video posts on Facebook estimated to have 135% greater organic reach than photo posts.²⁷ Such bespoke content offers provide the opportunity for companies to move into brand extensions that exploit IP around a show's characters, format or talent (IV12, 57).

Alongside this is an increasing emphasis on a distinct tone of voice that draws on the role of social as marketing and promotion (see Case Studies in Section 1.3 and 2.1.1). Importantly, tone of voice is not always mirrored between a television brand and its presence on social. As one experienced social producer argues,

“ Social media allows you to stretch editorial tone - TV/Radio are more trad in tone and sometimes that tone doesn't work on social ... (where there is a need to be more) humorous, light-hearted and relevant to people. And it's got to be authentic. That's the kind of buzzword that you get so much with SM ” (IV34).

As a result, some of the most successful social TV brands have adopted an 'ultimate fan of the show' (IV20, 22, 36) approach.

Social producers largely agree that there is a shift in successful social strategies from a one-size fits all to adopting different approaches for each platform (IV9, 26, 35, 38, 41). As one interviewee comments, 'I don't want one asset that goes out on 7 different platforms ... that's not the way people consume media and you're doing yourself a disservice ... [it's] best to have strategy for each platform and how to optimise it for the best time of day' (IV26). As another explains, this increases integration between social and television teams:

“ We used to be given a 3 minute behind the scenes piece for (a major programme brand) in widescreen and they'd say "there you go". But now we say: "we need a three minute for YouTube, and a one minute square for Facebook, ideally with subtitles, and something else for Instagram with photos around the piece ...". Effectively you're saying we need this multiple times so it increases workload but (really it's just) 10 pieces but 2 versions of each ” (IV41)

More widely, individual platforms are seen as having the following key strengths/uses (whilst all privilege the role of video and promotion):

- **Snapchat:** Instantaneous, youth-skewed, experimental, ephemeral, rough and authentic, real time, has to be mobile native;
- **Instagram:** Aspirational, beautiful and curated, exclusive access - a AAA pass to behind the scenes;
- **Twitter:** Immediate, the 'heart' of live conversation, the most popular companion to TV broadcasts;
- **Facebook:** Big promo channel, mainstream reach;
- **Youtube:** Archive monetisation, short form originals.

Our surveys and interviews reveal that few see live streaming as a key use of social platforms, which as we discuss in Section 5, differs significantly from the manner in which platform operators themselves are beginning to exploit the social television opportunity gap.

²⁶See Malik, O. (2017). What's Wrong with Twitter's Live-Video Strategy, *The New Yorker*. [online] Available at: <https://www.newyorker.com/business/currency/whats-wrong-with-twitters-live-video-strategy> [Accessed 15 Jan. 2018] and the riposte to this article, Comm, J. (2017). What's Right With Twitter's Live Video Strategy, *Forbes*. [online] Available at: <https://www.forbes.com/sites/forbescoachescouncil/2017/06/02/whats-right-with-twitters-live-video-strategy/#6fd5f38f4a09> [Accessed 15 Jan. 2018]. And Constine, J. (2016). Instagram launches disappearing Live video and messages, *TechCrunch*. [online] Available at: <https://techcrunch.com/2016/11/21/instagram-live/> [Accessed 31 Jan. 2018].

²⁷Templeman, M. (2017). 17 Stats And Facts Every Marketer Should Know About Video Marketing, *Forbes*. [online] Available at: <https://www.forbes.com/sites/miketempleman/2017/09/06/17-stats-about-video-marketing/2/#7ccac3041e11> [Accessed 31 Jan. 2018].

When: Prue Leith's tweet of 31st October 2017, sent whilst overseas, revealed the *Great British Bake Off* final's winner before the programme went to air in the UK that evening. In so doing, it threw into relief the delicate act of when to release social media content around television productions.



As one interviewee working in global brands such as *Dr Who* and *Top Gear* stated,

“I and my team are always mindful that we are supporting these shows from a global point of view ... so we are very careful about what we put out in line with UK TX ... and also for people in the UK who aren't watching live but are going to watch on iPlayer later” (IV41)

If production timelines are a crucial tension point in aligning social and television production effectively, one way of reconciling this is by adopting - and adapting -

TV scheduling tactics: ranging from pre-scripted, pre-scheduled social posts to tactics of tent-poling, counter-scheduling and stunting.²⁸

Interviewees discuss the television 'schedule as key to experience', especially the 'drive to live' (IV9). However, there are generally seen to be two broad types of social television content: (i) pre-prepared; and (ii) reactive (IV9, 23, 43, 48). Pre-preparation is necessary to develop rich content to play alongside a programme's TX, requiring social teams to pre-script, photograph, video and animate social media posts that are scheduled for release to coincide with pivotal moments in the programme's format or narrative drama (IV 4, 5). This includes the development of templates to enable 'fast turnaround video assets [that remain] high quality' (IV48), across video and photoshop (IV31). Such pre-prepared content must be complemented by reactive posting: 'the places where SM excels is when you have, as well as preloaded stuff, somebody who is part of the team responding to keep the conversation very live' (IV43).

However, liveness and co-scheduling is not always easy to align to an audience's social media experiences and routines. Teams debate the release of content, such as whether a piece should accompany a show's transmission or hit the audience at certain points in their day to sustain and build interest in a show. As one producer explains:

“You can put stuff on social that's in line with the tone of show but (you have to) remember they might be viewing that separately, at completely different part of day and it might seem inappropriate if, for example, late night cheeky show tone is carried through to Facebook post viewed the next morning - either it's completely pointless or it might be offensive” (IV35).

As another explains, this is about an intimate understanding of the audience: 'as a social team you are sharing the experiences of the audience so it's about pre-empting what they're going to be talking about and laughing about' (IV35). In the next section we discuss 'how' social television is made, requiring adaptation to existing production practices, workflow and technical array as well as promoting innovation and experimentation.

²⁸Bennett, J. and Strange, N. (2018). Twitter: Channels in the Stream. In: D. Johnson, ed., 'From Networks to Netflix: A Guide to Changing Channels'. New York, London: Routledge.





Section 3: Adaptation and Innovation in Social Television Production

Social media remains the most significant strategic, technical and creative innovation challenge for television producers in the near future (Pact/RHUL Survey 2017). What emerges from our research is the belief producers have in the interlinked nature of experimentation, innovation and monetisation: whereby the former are necessary risks worth taking in order to create good social content and experiences that can, at their best, also be monetised (see Section 1.3). In this section we explore these links and how they lead to adaptations to the very 'operating system' of UK television production.

Innovation is, of course, itself a slippery concept to define or measure. Our approach here draws on 'actor network theory', theorised by Bruno Latour (and others) to emphasise the innovation process itself.²⁹ In this

section we highlight examples of innovation that at least 3 separate interviewees ('actors') within the production network of social television discussed with us, in order to adopt a shared understanding of innovation built on current industry practice. As Steenson suggests, this understands innovation as 'not only transformed by practice, it may be derived from practice'.³⁰ Indeed, innovation is an imperative for production practice within a sector in which new external players (the social media platforms) threaten the Schumpeterian 'creative destruction' of incumbents. In this production ecosystem, individual workers must place a heavy rhetorical emphasis on innovation not only in lieu of the absence of standardised metrics, but also to self-promote their expertise and drive up budgets and their own value

²⁹Latour, B.(2005). *Reassembling the Social: An Introduction to Actor-Network-Theory*. Oxford: Oxford University Press.

³⁰Steensen, S. (2013). Balancing the Bias: The Need for Counter Discursive Perspective in Media Innovation Research. In T. Storsul & A.H. Krumsvik (eds). *Media Innovations: A Multidisciplinary Study of Change*. p. 55.

“Clients) want to see innovation and they want to see an absolute grip on every platform including obviously new and emerging platforms or new elements within emerging platforms ... bespoke content for every platform and yeah, different editorial purposes but also trying to think how we can migrate an audience from one platform to another” (IV48).

in the social television economy. Put simply, making claims to ‘innovation’ enables workers to self promote their achievements in a landscape in which measures of success are often far from concrete. However, this is not simply hopeless relativism in which anybody can claim to be ‘innovative’: as our opening quote to the section suggests, the creative practice and process of innovation is most often ultimately measured by client demand and ROI (see 3.1). By taking such an approach we build on Stuart Cunningham’s leading analysis of innovation in the creative industries that emphasises the need to look beyond traditional terms of new products, recognising the role that experimentation - and even failure - can take in the process of innovation, adaptation and monetisation.³¹

The expectation that experimentation will generate to a return on investment has led to a range of adaptations to production practices, technologies and techniques - with social and television production methods informing one another: from editing to compliance, aesthetics to ethics (see 3.2). Such adaptations are becoming increasingly formalised in a bid to turn experimentation into innovation and monetisation. As one senior digital executive explains, producers no longer just sit and tweet along with a show to ‘see what happens’. Instead there is careful planning of ‘what will I tweet, what picture is attached, is it the right aspect ratio, is our show logo on it, does it need to link to this or that, should it be gif or video, should I do the same thing on Instagram ...?’ (IV35). During ethnographic work we observed carefully planned workflows that started long before the production of live shows (see Section 2), with senior executives now looking over social media scripts from a brand perspective with a concern to not only ensure continuity of tone of voice and approach, but also develop activation strategies at editorial (copywriting, community management), design and financial levels that work across multiple platforms (IV5, 23, 26). This care increasingly extends to issues of ethics and compliance, which are being adapted to fit the speed and interactivity of social platforms (see 3.3). Whilst regulation of platform operators remains a fraught economic and cultural debate, there appears to be a need for greater formal collaboration between television, digital, advertising industries and technology companies on such issues for innovation to continue to thrive (see Section 5).

Across Section 3 the opportunity gap for the sector might best be understood by relating this period to television’s immediate past. Experimentation that leads to innovation may be exciting and professionally rewarding but, as with the preceding period of multiplatform production, there comes a point at which social television must pay for itself and/or deliver to core business priorities. If it does not, attention will move on to the next opportunity - such as immersive experiences, AI, object-based media

and beyond (see Section 6).³² However, whilst audiences remain so strongly attracted to social platforms the immediate future suggests that adapting to social television will remain a key priority for the UK TV industry.

3.1 Innovation and Experimentation

“If you get over that hurdle (of social being more than marketing) it gets really interesting .. what should TV programme-making look like in a digital world that embraces social platforms as part of the storytelling experience” (IV40).

“What I like about social is the chance to experiment with new types of content ...” (IV41).

Where marketing and editorial functions of social have fused (see Section 2.1.1), many interviewees enthuse about the opportunities for producers to ‘try to be risky’ (IV32). Whilst a sole focus on the promotional role of social can lead to a division between television and social media production or just generate approaches that ‘felt quite boring’, companies that adopt better integration between editorial and marketing find greater creative and commercial buy-in across the organisation to just ‘try [stuff out]: there is nothing to lose’ (IV6).

Despite the pressure to evidence ROI, many companies are less directly concerned with analytics as a measure of success, as ‘it’s all grand experiments as you don’t know who is going to tap into it when and what time’ (IV6, see Section 1.2). Instead, most interviewees focus on creative experimentation and its attendant rewards of audience engagement (IV6, 7, 10, 13, 32, 38, 40, 41, 42, 48). Indeed, even where audience analytics are used extensively as part of companies’ business models, insights on audience behaviour often fuel further experimentation rather than cement fixed strategies. One successful social agency explains how their insight team’s role is to promote constant experimentation, ‘forever trying new things, testing new ways of applying it, be that in simple things like thumbnails and titling through to screens and animation in that style then into monetisation, where should mid-rolls be placed, what is the optimum point for these things’ (IV47). Others speak of a process of trial and error that is ‘baked into’ some companies’ ‘creative process: trying stuff out, seeing what the audience likes and then dumping stuff quickly that doesn’t work and amplifying the stuff that does’ (IV48). A culture of experimentation might therefore be seen as crucial to innovation and success for social television production (See Case Study: BBC Digital Guerrillas).

³¹Cunningham’s work stresses the need to consider the ‘application of ideas for realized or potential economic, social or public benefits’, which understands innovation as something beyond ‘merely a cost efficiency driver for intervention’, Cunningham, S. (2013). *Hidden Innovation: Policy, Industry and the Creative Sector*. Brisbane: University of Queensland Press, p. 4

³²Chitty, A. (2013). How Multiplatform PSB Stopped Trying to Change the World and Grew Up (but Got Smaller), *Critical Studies in Television*, 8(1), pp.108-130.

Case Study:
Innovation Cultures - BBC Digital Guerrillas
(2014-2017)



Announced in March 2014 the BBC Digital Guerrillas were formed to experiment with new technology in the creation of digital content that could 'sit inside TV production, to create experiments, with channels as editorial partners to focus on youth audiences' (IV40). The BBC said that they 'will have the creative freedom to produce experimental new forms of content for programmes and services using the technology and approaches of the future'.³³

The unit adopted an agency model to hiring and training staff, constructing a lab environment where creative technologists worked alongside digital designers, content producers and writers. Staff often had 'fused' roles (see Section 4.1), whereby designers might also do motion graphics and the team was designed 'to be self-sufficient in building digital content ... able to scale any of the work' by partnering with other parts of the BBC.

One such innovation project was the 'live social media experiment' #RamadanInADay, which ran in July 2015 in partnership with the BBC Asian Network to capture the spirit of Ramadan, from sunrise to sunset, in direct conversation with young British Muslims online. As Will Saunders (former Creative Director, BBC Studios) explains #RamadanInADay was a 'unique social media broadcast, featuring one of the first BBC uses of Periscope as a compliant live broadcast tool. The entire production was socially born, including casting contributors using SeenIt'. As Saunders goes on to say, the success of the project was in 'creating a feedback loop using The Asian Network and BBC News Channels to drive TV and radio audiences to social media and vice versa'. This enabled #RamadanInADay to trend on Twitter across the day in the UK, whilst 'BBC Asian Network doubled their average organic reach on Facebook during the broadcast' (Saunders, Interview 04/04/2017).

When BBC Studios was created in 2017 the BBC Digital Guerrillas' status as an internal independent agency was questioned and, consequently, funding was no longer guaranteed. Headcount was reduced with a couple of the team becoming part of the new BBC Three. The obstacles they met were both geographic, with no significant production or commissioning base in Birmingham, and organisational. The Digital Guerrillas were launched inside BBC TV Production just at the start of its journey into becoming a commercial subsidiary, and with BBC Studios 'there was little subsequent appetite for innovation or for anything outside of the core business of developing and producing television content'.

The Digital Guerrillas' status as an internal independent 'agency' distanced them from the main organisation, becoming 'one of biggest hurdles' to overcome in pushing innovations forward (IV40). The challenges met by BBC Digital Guerrillas indicate how, as one interviewee explains, the pendulum is constantly swinging within the organisation 'between creative autonomy and entrepreneurship and civil service bureaucracy' that creates a push-pull between media strategy and implementation, which can often pit innovation against consolidation (IV11).³⁴



³³BBC. (2014). BBC Announces New Digital Innovation Unit in Birmingham, *BBC Media Centre*. [online] Available at: <http://www.bbc.co.uk/mediacentre/latestnews/2014/digital-innovation-unit>. [Accessed 13 Feb. 2018].

³⁴See Flood Page, M. (2015). *The Development of BBC On-Demand Strategy, 2003-2007: the Public Value Test and the iPlayer*, PhD Thesis, University of Glasgow 2015. [online] Available at: <http://theses.gla.ac.uk/6779/1/2015floodpagephd%20.pdf>. [Accessed 5 Feb. 2018]

Arguably this emphasis on experimentation is made possible by not only the creative strengths of the UK television industry, which has fostered collaborative innovation in television and digital content production and services throughout the 2000s,³⁵ but also because of the rapid reduction in costs associated with social television production. This drop in costs relates to technical equipment and infrastructure as well as changing audience expectations of quality. Thus interviewees discuss a range of examples where what might have previously been a 'full scale production' (IV14), is now possible with an iPhone - such as the move of live streaming from 'Red Button' interactive TV services to being made available via Facebook Live or Periscope (IV4, 5, 6, 13, 14). As a result, forms of innovation we find often promote authenticity, intimacy, speed and contemporaneity with viewers' lives.

Much innovation has therefore taken place in genres that emphasis liveness, such as Entertainment programmes, News and Sports as well as Live Events. Although our research excluded News and Sport as an explicit focus, these genres are seen by many as key sites that are 'pushing boundaries, [being] agile and experimental' (IV40), because they recognise 'how to engage a world where they are not the conversation: it's going on all the time on social ... they're live, organic, always moving and always enabled' (IV42).³⁶ One pioneering example in Sport is Formula E, which streams races live on Facebook and puts fans at the heart of the format via the #fanboost social media voting system that provides the most popular driver with a power boost during races (see the Little Dot Studios Case Study in Section 1 for more on the company behind Formula E's social content and distribution). But Formula E also develops an all access backstage pass approach to its social media coverage, providing fans with intimate access to drivers and bespoke content to maintain the community between races (IV8). This leads to groundbreaking experiments, such as Damien Walters' 'Leap of Faith'³⁷, which has garnered 1.5m YouTube views of the stuntman's backflip over an on-rushing Formula E car, filmed from the driver's view in 360° at 100 kph. Such stunts do not simply act as innovation or experimentation for its own sake, but instead appeal to the Formula E community that gathers around such shared social moments: '[You need] to know how to add value to audiences of social as opposed to simply trying to compete for attention, simply trying to be another shiny item in a somebody's newsfeed' (IV42).

An example of where experimentation is producing creative and economic rewards is the emergence of

'social media storytelling ... as a strand unto itself' (IV40). As one senior digital producer explains, this draws on the heritages of television Drama, Interactive and Multiplatform production, as well as gaming (see earlier Humans Case Study). It views the 'internet as a canvas' in which the different social platforms are a key fabric, integrating social, digital, marketing and television production teams to explore the story world collectively and in more detail (IV40). Social storytelling and innovation in social media for Drama tends to thus focus on established transmedia modes of extending the storyworld beyond the TV programme, perhaps unlike innovations in live genres that integrate the experience as something to take place alongside viewing of the programme itself. *Skäm* (NRK, TX 2015-17) has been a particularly high profile example of social storytelling, innovating in its use of social accounts for characters that release story video, text, images and interactions across the week in a rhythm that reflects the lives of the characters and the target youth audience. Whilst there is a weekly 'episode' that gathers together the social media fragments, the show lives across the 'canvas' of social platforms.

In the UK, the BBC has experimented, through the Digital Guerrillas, with social storytelling for dramas such as *Thirteen* (BBC3, TX 2016), which integrated social marketing and storytelling to release content according to a calendar rather than a linear schedule (IV40). This approach proved successful in targeting a 16-24 y.o. female audience, which is traditionally perceived as 'hard to reach' for broadcasters on any platform. *Thirteen* showed that such audiences are more open to 'accept all kinds of different shapes as long as narrative is good and interesting and relevant to the platform' compared to 'older generations' more 'siloe'd' view of narrative in traditional episode lengths (IV40).

Such experimentation is crucial to engaging 'digital natives' who are brought up on different experiences available via television, gaming and social media platforms and thus want 'different sort of spins on technology and technical storytelling' (IV40). Another interviewee commented on how storytelling is impacted within a context of constantly updating news feeds, 'social media content .. is about being able to convey a story as quickly as possible' (IV56). The success of Instagram Stories, garnering over 200m daily active users³⁸ in its first year, suggests social storytelling will not only attract creative talent from the UK television industry, but also benefit from the support of platform operators to have a vibrant future ahead.

³⁵See for example, Pratt, A.C. and Gornostaeva, G. (2009). The Governance of Innovation in the Film and Television Industry: A Case Study of London, UK. In Pratt, A.C. and Jeffcutt, P. (eds.) *Creativity, Innovation and the Cultural Economy*. Routledge: London, pp. 119-136; and Bennett & Strange, et. al.(2012). *Multipatforming Public Service Broadcasting*.

³⁶See, for example, Belair-Gagnon, V. (2015). *Social Media at BBC News: The Re-making of Crisis Reporting*. Routledge: London.

³⁷See https://www.youtube.com/watch?time_continue=79&v=_Uv64c4HdTg.

³⁸Richter, F. (2017). Instagram Stories Blows Past Snapchat, *Statista* [online] Available at: <https://www.statista.com/chart/9086/daily-active-users-instagram-stories-snapchat/>. [Accessed 21 Jan. 2018].



US (IV32, 33) whilst Norway broadcaster NRK's award-winning *Skäm*, as earlier discussed is routinely positioned as a pioneer in the field for the intimate, authentic and immersive experience it offers viewers of the drama's world.

Nevertheless, the emphasis on experimentation and innovation within the sector has led to a variety of adaptations to the television technical and production set-up and processes.

As we set out in Section 5, there is huge value for the platform operators in developing, supporting and promoting innovation on their platforms. This can lead to direct and indirect forms of investment in content creation. The power dynamics here fuel experimentation and innovation, not only by platform operators supplying new tools and services to broadcast partners - for example advanced analytic services, enhanced promotion on the service for trialling new content production techniques such as 360 video etc - but also because of platform operators' control over how content reaches audiences. As one experienced interviewee sums up: 'there are things that just don't work one week, but they will work the next week', because of changes in the way platforms prioritise or promote content to meet their own business strategies (IV32). This can leave both production companies and broadcasters subject to the new power held by platform operators who mediate access to both audiences and advertiser spend (see Section 5).

However, interviewees note that innovation is not merely being driven by platform owners but also by television companies and their digital/social agency partners. Thus, as one interviewee explains:

“There used to be innovation by social media platforms and then everyone else would jump on board. Whereas now, within those production companies and broadcasters, expertise is growing in this area ... we are working out how to use these platforms much quicker and innovating as opposed to just jumping on board” (IV38).

Although such adoption of social media is spreading, some raise concerns about the level of investment being made to maintain such innovations - in relation to both training and production funding (see Sections 4 and 6). As one leading social producer states: 'I don't think that there has been anything too exciting recently' (IV6). Interviewees note that investment is much higher in the

3.2 Adaptations to Television's Technical Array

The growth in importance of social to the television industry is leading to some significant, and some more ostensibly minor, adaptations to the industry's production grammar and practices. These are affecting how content is made not only for social platforms but for the 'big screen' of television as well. Such adaptations are therefore to vary the 'operating system' of television as a whole. John Ellis describes the operating system as 'the combination of human and machine in the skilled use of machinery ... [it] transforms an artfully constructed assemblage of hardware into a productive mechanism'.³⁹

This system is experiencing contradictory pulls towards both a greater relaxation about broadcast technical and quality 'standards' being applied to social media whilst also professionalising and raising standards of social productions to meet audience expectations (see also Ethics and Compliance in Section 3.3). On the one hand, interviewees discuss how there had previously been a concern to ensure they were shooting on high-end kit or utilising a professional crew, whereas now the attitude is 'ok, we're digitally native, let's do it on a phone. Let's just get the moment. It's more important than waiting to get a crew together' (IV31). Another executive gives the example of hacking together kit to enable quick solutions that respond to audience demand: 'my iPhone gaffer taped to a tripod, 25,000 people watching' (IV13). On the other hand, there is also a realisation that whilst broadcast technical equipment, standards and crew may not be necessary, it makes sense to ensure social content is high quality when the battle for attention across both television and social media platforms is so strong and a disparity of production values between TV and other platforms undermines the brand's 'quality' associations: 'if you've investing millions in great TV, if your social looks shoddy it reflects really badly on TV show' (IV4).

As some argue, quality in this context may pertain more to 'immediacy and access' (IV29) than traditional television conceptions. However, this requires an adaptation of television's production grammar for social.

³⁹Ellis, J. (2015). 'Between Human and Machine: The Operating System', *Journal of Contemporary Archaeology*, 2(1).

Here we see a concern with issues such as aspect ratio, with social media teams developing a syntax of shooting that is 'tighter' to fit the context of display (IV8) and resisting television's insistence on landscape orientation when people may watch via their phone's portrait orientation or Instagram's and Facebook's emphasis on square aspect ratios. Indeed square videos are shown to get more engagement than horizontal videos as they take up more space in the Facebook News Feed.⁴⁰ The 'operating system' of social television production needs to move flexibly between such ratios, sitting in tension with the established standards of broadcast television. Similarly the competition for 'screen real estate and people's attention' in the cluttered and crowded spaces of social media streams has seen leading producers 'upping colour grade' to make content 'pop'. As this interviewee goes on to explain, the viewing context of social challenges taken-for-granted practices of television cinematography: 'you don't just want to make it look nice for normal aesthetic reasons you might on TV. ... Colour grades on social [should] make things look really super vibrant' (IV8).

The developing grammar of the look of social media for television has also led to an increased emphasis on subtitling (IV7, 8, 9, 36, 38, 41). One commissioner relates the story of when their broadcaster began to understand the importance of subtitling:

“We had a big sit down ... and someone said “our videos haven't been very popular lately”, and I was like, “why is that?” And they said “because we are not subtitling them” and I was like, “wow, oh yeah I totally get that, I never watch a video (with sound) ... Now 85% of (our) videos online have subtitles” (IV38).

The emphasis on sound (and lack of it) owes to a growing awareness of how people consume videos via social media, not only in relation to technology and viewing context, where it cannot be assumed headphones are on/available, but also the importance of brevity and competition. As others explain, social video content has to 'capture people's attention in a shorter span ... [it] needs to be more hard hitting, with more obvious emotional triggers and you need to think about what interaction you want from the audience in the context of that platform' (IV40). As one experienced social producer discusses, what ties together these disparate production uses of social media is ultimately 'just thinking about what device is your audience is actually watching something on?' (IV8).

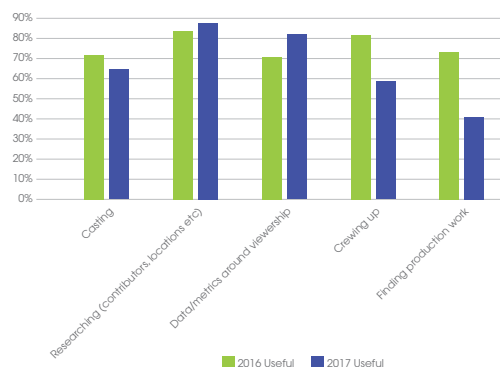
At the same time, the rise in importance of social media also sees adaptations within the grammar of television itself:

“These things develop over time and acceptability, and the presence of a social media voice, the emoji, the hashtag on air, the app handle on air ... has become more and more ubiquitous as people understand that people no longer exist with a single screens, people exist on several media at the same time and if you want to be effective you need to be on both of those media otherwise the other one will win” (IV9).

Along with impacting the visual grammar on-screen, social media is influencing the wider production processes of television. Whilst analytics remains the predominant production-facing use of social media (65%) (see Figure 2.2 for analysis of audience-facing uses of social), a range of other uses of social media as a production tool are emerging.

For example, social media is increasingly used in researching and casting programmes: more than 80% of survey respondents in each year rated social media 'Useful' for looking for contributors or location scouting, whilst over 60% used it for casting (see Figure 3.2) and this sentiment is confirmed by many interviewees (IV 1, 2, 13, 30, 31, 38). Facebook Live and Skype have all been used for casting and auditions (IV12, 31, 43) as they provide access to 'huge amounts of people quickly and cheaply' compared with 'putting an ad in *The Sun* for £500' (IV43).

FIGURE 3.2: Production Facing Uses of Social (2016-17)



⁴⁰McCue, T. (2017). Top 10 Video Marketing Trends And Statistics Roundup 2017, Forbes. [online] Available at: <https://www.forbes.com/sites/tjmccue/2017/09/22/top-10-video-marketing-trends-and-statistics-roundup-2017/#35bb2f557103>. [Accessed 27 Jan. 2018].

The use of social media metrics and data has also grown during the research period, rising from 71% to 82%. This suggests that whilst many question its usefulness or accuracy (see section 1), there appears to be little or no alternative for gaining some understanding of how audiences engage with television productions at present. Although there is a decline in use reported in relation to crewing up and finding production work, we believe this reflects a methodological issue in the survey sample that saw it distributed to predominantly senior company representatives who may not have the need to access such opportunities through the peer-to-peer networks of social media. Overall the survey findings point towards the widespread adoption and adaptation of social media tools in production.

More widely, 38% of respondents to our 2017 survey reported using collaborative tools for organising productions and a further 16% used Google+ for company work. Interviewees provided numerous examples of teams utilising widely available tools, such as DropBox, Slack, Google Docs and WhatsApp, among others, to navigate around clunky and inefficient proprietary systems of companies, broadcasters and brands (IV1, 2, 10, 14, 19, 20, 21, 22, 23, 25, 30, 31, 43). As one company founder argued, when she set up a social media agency,

“I wanted everything to be the opposite of (broadcasting) ... being stuck behind (proprietary systems) that wasted so much time. So everything we use is native to the social platforms where it belongs: Skype, WhatsApp, YouTube and testing stuff on Twitter and Facebook private groups before posting” (IV23).

The uses of such social media tools are neither simply a point of contradiction to broadcast production models nor insignificant. As one senior producer explains of a complicated primetime rig series, social tools are integral to television production itself. She explains how the cloud-based collaborative workflow tool Slack provided ‘us the eyes of a rig without a rig ... it became a text version of the gallery’ for series producers. During filming, each team was given ‘their own slack channel so they could see all 7 or 8 streams and message individual teams’ notes and editorial structures’. In post-production, these ‘Slack channels became edit notes because the edit was happening concurrently’, including acting as a repository for timecodes. Similarly to productions we observed in Light Entertainment, where walkie talkies

were eschewed by digital production teams in favour of WhatsApp, this producer explains that ‘we bought walkie talkies but they stayed in their box for 7 weeks ... people were just using Slack or WhatsApp on their phones’ (IV43). Ultimately, as one experienced social producer who had worked in television and social agencies summarises, the principles of production for social are ‘not so different to TV, they are just magnified or compressed’ (IV8).

As we explore in Section 4, these small differences are crucial to the skills of social television, leading to new aesthetic and technical forms, job roles and, ultimately, audience engagements and revenue streams. Collectively such shifts suggest the operating system of television has been gradually but radically and irreversibly altered so that social media is now an integral part of any production. From the status of the smartphone as an indispensable piece of kit for any production through to the development of gimbals and lightweight lenses, a range of apps and new software for editing ‘on the fly’ into social media feeds through to producers’ more dexterous thumbs tapping away at tiny screens, television production is adapting to social media. As we explore in the following section, such adaptation extends to ethos of production to include compliance and ethics.

3.3 Compliance and Ethics: ‘Don’t Drink and Tweet’

Television producers have had to learn quickly that their role in ensuring programmes are compliant with ethics, broadcaster and brand standards now extends to social media. Equally, social media workers coming from digital or marketing backgrounds have found a different set of expectations, processes and regulations in place when working in social production for television. The hybrid spaces and roles (see Section 4) of television’s social media work generate a tension between the legacy of broadcasting’s well-established standards and the lack of clear regulation of social platforms that is increasingly under scrutiny.⁴¹ Much social television work takes place upon the privately run spaces of platform owners, where workers’ own private and professional identities blur, and rights and responsibilities may be unclear. The professional relationship between mind, body and machine of television’s operating system thus needs to adapt to a working environment that extends to the use of personal devices in private spaces long after normal working hours have ceased. As one interviewee counsels, this can easily make the pub seem like a work environment, but ‘don’t drink and tweet’ (IV13).

⁴¹see Gillespie T. (2017). Governance of and by Platforms. In Burgess, J., Poell, T., and Marwick, A., (eds) *Sage Handbook of Social Media*, Sage. [online] Available at <http://culturedigitally.org/wp-content/uploads/2016/06/Gillespie-Governance-of-by-Platforms-PREPRINT.pdf> [Accessed 1 Feb. 2018] and also the furore over fake news in 2017 that has led to increasing calls for media regulation of platform operators, for example see Ruddick, G. (2017). Ofcom Chair Raises Prospect of Regulation for Facebook and Google, *The Guardian*. [online] Available at <https://www.theguardian.com/media/2017/oct/10/ofcom-patricia-hodgson-google-facebook-fake-news>. [Accessed 1 Feb. 2018]

Case Study: Editing for Social Attention

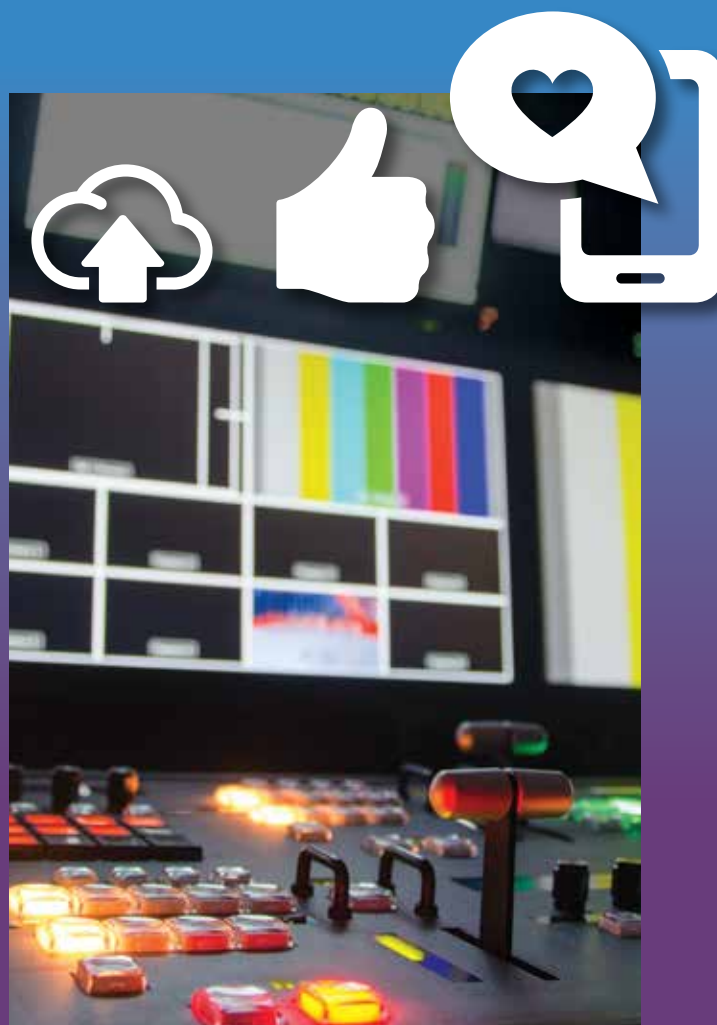
Editing is one area where television's production practices has seen significant adaptation to produce innovative and engaging content for social media. This has affected the way in which both live productions and a range of pre-recorded genres produce promotional and ancillary content. In particular, editing and post-production is crucial to reimagining the programme brand and production grammar for a space where 'if you don't grab somebody's attention [immediately] they're gone' (IV41)

At BBC Worldwide this has led to the development of 'flash promos', such as that for *Planet Earth II* which pulls together a fast-paced montage of key moments from the promo itself up-front. Due to autoplay on platforms such as Twitter and Facebook making the first 5 seconds on those platforms critical for audience engagement (IV39) producers are thus adapting television editing practices. 'Traditionally for these productions trailers start of black and then fade up into gorgeous landscapes and music comes up and it takes a good 5 secs to get going' (IV41). Whilst this is great for television and even for YouTube, it 'doesn't work for Facebook because you're in a world where [it's a] scrolling newsfeed' (IV41). As another interviewee explains, 'the first three seconds you get the hit that keeps you hooked in, you wouldn't edit a TV sequence like that' (IV55). Thus, their television and marketing counterparts 'thought we'd left something at the beginning, [saying] "I don't think that should be there"' (IV55). The flash promo opening, however, led to the trailer being the most successful ever released by BBC Worldwide on Facebook (IV41).

Editing for social media accompanying live television has also adapted traditional TV and social media production practices, which 'take the same principle [as television] and do it in a much shorter space of time' (IV8). The system of TV production sees teams work at great speed in order to ensure the social feeds are in sync with live broadcasts or streams, often using cloud based systems to ensure that multiple team members can access assets on personal devices and across locations.⁴²

One crucial tool within this production workflow is a cloud-based social and digital production, editing and distribution platform, such as SnappyTV or Grabyo. These systems enable producers to edit packages in near real-time, clipping and distributing highlights from live programming to social audiences across a range of platforms. Creatively they enable social TV editors to make branded clips, gifs, memes and interactive content that, at their most successful, fuse editorial with marketing functions (see

Section 2.11). These tools also promise content owners the ability to reach new audiences on social, drive traffic to live broadcast feeds and generate revenues via sponsorship extension and targeted advertising. SnappyTV is a particularly significant tool in this new social television production ecology: purchased by Twitter in 2014 it has enabled the platform operator to build a proprietary workflow system that encourages the television production community to focus on Twitter, whilst simultaneously enabling the Tech company to enhance its live streaming capacity. Such moves increase the competition between platform operators and the TV industry (see Section 5).



⁴²See Bennett, J. (2016). Tweet Production: Social media and Live Television, *Critical Studies in Television Online*.



Social media's emergence as privately run spaces that audiences access via telecom ISPs lies in stark contradistinction to the emergence of television as a medium in the early 20th century: distributed across the public airwaves and strongly regulated by the principles of public service broadcasting. The implications of this distinction are grappled with by not only the broadcasters but many TV companies seeking to understand their responsibilities and liabilities in the spaces of social media, particularly as they often represent key programme or even channel brands. As one experienced producer explains:

“It's not like we've got all the answers yet ... we have all kinds of rules and regulations about what we do on TV and Radio. And indeed on our own website. And we don't have those rules around what we do on social media. So we're slightly entering into the Wild West: how do we get this right fundamentally for our audience and for the people who pay the licence fee?” (IV34).

Most producers similarly agree that they are figuring out how to approach compliance, brand guidelines and ethics for social media. Some argue that 'the same rules of compliance and taste and protecting our viewers and families' apply (IV31) or that 'the rules of the show extend to how you behave on social media' (IV32), including in live streams on social platforms (IV35), which 'shouldn't be any different to other live broadcasting in terms of editorial control/compliance' (IV18). This increasingly includes gaining ethics release forms from participants involved only in social media content and ensuring productions and crews have the right level, and understanding, of public liability insurance. For these producers, social is 'just one more stream' to add to the output (IV18).

The transferral of such approaches has been eye-opening for those coming from a stronger digital or social background:

“We don't come from a TV production background, a lot of us are digital marketers or have social backgrounds. So it's been really interesting for us to actually talk to ... our Ed Pol (editorial policy) teams and our compliance teams, (who) very much come from a telly background. ... they've been able to kind of educate us because there are certain things that you know we might not think about. ... (like) what happens if somebody swears (during a live social stream)” (IV55).

As this interviewee goes on to express, it is also the case that social is 'quite new' and his team has an important role in shaping how broadcast approaches might respond differently on social platforms. For many social producers this means there can't be 'traditional sign off process' as, regardless of whether a programme is broadcast live, social remains 'so live all of the time' (IV21). Others describe this as a broadcast approach mixed with common sense (IV48), which some admit means taking a more relaxed approach: 'If you make a mistake you make a mistake' (IV21), it's 'all part of 'social media' (IV22). As another explains, 'if we had to comply every picture, Tweet or Snap it would be impossible, you would never be able to do anything live' (IV20). Thus whilst broadcast's compliance apparatus tends to be preemptive, ensuring adherence to standards before programmes go to air, social media operates a mixed economy of preemptive and reactive (responding to the modes of production discussed in Section 2.2).

Reactively this means senior executives policing a range of accounts that multiple staff have access to via personal smartphones, taking down any posts that are deemed to fall foul of compliance issues, ethical standards or brand guidelines. Tone of voice is a particularly fraught area for many due to the interaction with audiences that can result. In ethnographic work for this project we witnessed one senior channel executive asking for the removal of a playful defensive rebuke from the show's social staff to a derisive post by a well-known newspaper columnist and provocateur/troll because their response was deemed 'tonally off' for the channel and programme brand (FN 02/04/2016). Another senior executive talks of having to tell staff 'please don't reply' to certain celebrities on social media who may goad an unwanted response or engage at a level of intimacy and insider humour that is inappropriate, leading to audiences being excluded (IV31).

In most of these instances, social producers view any consequence as likely to be 'quickly forgotten' (IV22), as whilst sometimes the press may go 'a bit wild about

it ... mistakes happen ... most of the time they are gaffs' that are harmless and get picked up (IV21). However, particularly in Documentary and other Factual genres, there is an awareness of 'an extra layer of care and compliance that' is developing around social media (IV1, IV2). This is especially true for vulnerable contributors (IV10) and a more general need to consider the impact of a programme 'post-transmission where the programme can have a longevity and expose contributors to a level of scrutiny previously unknown' (IV1). As this senior executive explains, consent given by contributors for documentaries is traditionally given to the filmmaker for the release of the film in a specified window - whereby the programme will eventually become archive. Consent is given 'to somebody who you know is going to take their duty of care to you seriously, rather than consenting to random sharing on Facebook', yet this is what now happens as programme material is shared, re-edited and re-posted across social media by audiences (IV2). Whilst programme-makers across genres have embedded greater care, briefings and workshops for contributors and contestants about social media (IV1, 2, 6, 32, 36), the lack of consensus about responsibilities and regulation of social media leaves many with a cause for concern around compliance. In particular, that such issues may stifle creativity and risk - particularly as broadcasters move increasingly into commissioning short form content for social platforms.

Finally, such issues are further complicated by the reliance on staff's personal devices for social media work as well as having significant implications for working hours and spaces of television production (see Section 4.2). As one experienced senior digital producer explains: the risks of having professional accounts on personal devices is that 'with one slip of the finger you can just do stuff ... suddenly tweet from the wrong account' or worse (IV13). Interviewees supplied a range of such mishaps which, for the sake of preserving their anonymity we haven't referenced in our usual format below, including:

- Using push notifications on one brand's app to mistakenly promote a rival programme brand;
- Sharing a picture of a 'hot builder' from a work, rather than professional, account;
- Being derogatory about a brand using a public service broadcaster's channel account.

As experienced social producers admit, whilst precautions such as limiting access to brand accounts can be taken, such mistakes are bound to happen if the norm is that people use their own phone, their own data and their own time to do the work of social media (IV23). Training and trust of staff responsible for social media is thus paramount to success, as providing staff access to a

social account is 'basically giving people the keys' to drive a brand (IV26), which is crucial to a business: 'We built our business through trust and we know that one rogue post can ruin all of that. ... Nothing more than Twitter users love than someone screwing up on Twitter' (IV27).

Such precautions and responsibilities extend to producers' management of talent, which has been a notably vexing area for companies to police (IV5, 14, 38). Many producers discuss the increasing engagement of talent with social media and their audiences as a 'double edged sword ... you don't know what they're going to do, especially ... during a live show' (IV14). However, perhaps even more problematically for producers is the need to ensure talent are congruent with the brand across their social media profile - before, during and after their role in a particular programme. Thus interviewees discuss how the emergence of past posts on talent's social media feeds could cause the 'shit to hit the fan' when 'things [are]unearthed that ... would never have been allowed to say on telly' (IV38). As this interviewee relates, whilst the programme itself might be compliant, audiences, broadcasters and brand owners don't necessarily see the difference between this and the talent's social media presence when it is heavily aligned to the brand. Such incidents lead to greater caution in checking over talent's social media background, even occasioning the cancelling or non-renewal of contracts (IV6, 38).

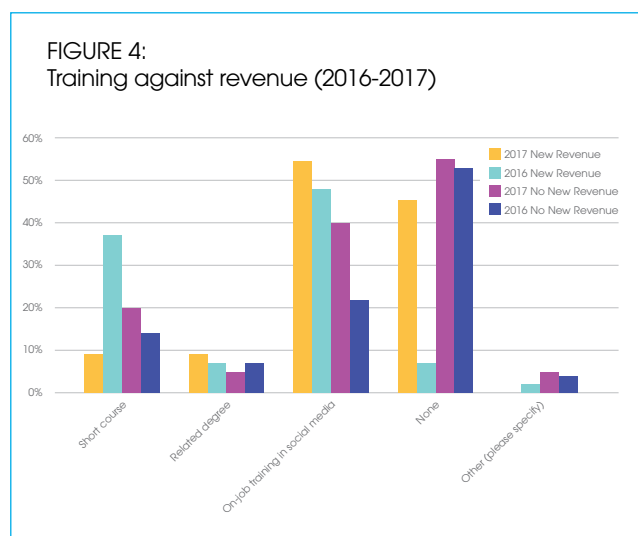
Ultimately compliance can be seen as a further space of adaptation in television production, fusing social and broadcast sensibilities to bring about hybrid solutions and approaches. Given the risk of damage to brand reputation, productions and, indeed, people that poor compliance and ethical processes can pose, developing approaches that are on the one hand robust, and on the other hand that do not stifle creativity, will be crucial for companies and broadcasters to successfully exploit the opportunities of social media. Such conditions suggest there is a need for the platform operators to help develop appropriate approaches and have strong relationships with television's social media production in order to aid this process. The opportunity gap of social television can only be addressed by greater collaboration that might enable platform operators to draw on the wealth of experience from UK television's broadcasting heritage whilst simultaneously requiring increased transparency from platform operators in how they serve content to audiences⁴³. As platform operators move increasingly closer to humanising their algorithmically-determined offerings, compliance and ethics offer fecund ground for developing an approach to audience care that places the UK at the forefront of social television innovation whilst also remaining true to the public service broadcasting principles that govern so much activity in the sector. We develop this discussion further in Sections 5 and 6.

⁴³At a recent digital, culture, media and sport select committee on 'fake news' information commissioner, Elizabeth Denham, called for greater transparency on the use of user data to serve up particular content by social platforms - see Hern, A. (2018) Social Networks May Have to Reveal How They Target Users With Ads, *The Guardian* [online] Available at: <https://www.theguardian.com/technology/2018/mar/06/social-networks-reveal-how-they-target-users-with-political-ads>. Accessed 7 Mar. 2018].

Section 4: Multi-skilled and Always On: The Roles and Workplaces of Social for Television

The formalisation of job roles in social television production is at a nascent stage. Our interview findings evidence a frustration in getting people across the television industry to recognise the skill and resource needed for social production. As one senior producer explains, good social television 'doesn't just happen because somebody happened to have a camera at the right time, it happened because good people are paid to produce good material' (IV55). 'Good' social media for television demands both resourcing and particular skills. While this skillset might share many aspects of television production practice, it is the '1% difference' (IV8) that can make or break a successful social experience for TV.

As we set out in Sections 1 and 2, under a quarter of Pact member survey respondents are deriving new revenue streams from social media. Either consequently or causally, this lack of return from social media sees a corollary lack of investment in training across the industry: less than half of surveyed companies have any staff who are trained specifically for social media work (Figure 4: Training & Revenue). Indeed, there is a significant decline in such training between 2016 and 2017: whilst overall levels of training have declined slightly from 51% to 46%, the level of training in revenue-generators has rapidly shrunk from 93% in 2016 to just 55% in 2017. However, given the priority placed on the need for training and bespoke skills by our interviewees, this abrupt shift may be accounted for by respondents to the survey indicating that they had not provided new training since the previous survey.



In fact, we may be witnessing a democratisation of social television production rather than a de-skilling or de-prioritising within the industry. Social media is increasingly embedded across teams within a company or production:

such work is split equally between company directors, producers and directors, and junior staff – with a much greater propensity for revenue-generators in 2017 to report that such work is undertaken by 'everyone/no-one in particular' than in 2016 (up from 6.9% to 36%). As one employer summarises, there has been a 'change in terms of the people we're employing, and the people we've seen coming through, everybody in our team is hands on' (IV55). As we explore in this section, there is an increasing expectation that freelance and permanent staff across a company or production team will take part in social media production, brand management and audience engagement: placing an emphasis on hybrid roles and 'slash' careers (see 4.1).

Despite the lack of training provided on the ground, our surveys suggest that the need for different skills for social media production is well recognised across the sector: only 8% of 2016 respondents disagree that training is necessary, with 52% agreeing or strongly agreeing that training is necessary. Social television production skills are intimately connected to core TV production skills, but require a different skill base and way of thinking about audiences:

“ A traditional producer can make traditional content for social but it does not resonate in the same way. The way we're trained ... for social is (for example, in understanding) the benefits of using influence as part of content creation; the key to that first three seconds of the content; how is the content going to stand out ... It's applying the knowledge of being native to each of those different platforms to production sensibility, but also knowing the audience and having to innovate in that way ” (IV47).

The most frequently cited kinds of training desired by survey respondents are (2017):

- Shooting and editing video for social (62.5%)
- Data analysis (62%)
- Platform-specific insights (56%)
- Writing for social media (54%)
- Graphic design (54%)
- Understanding algorithms (52%)

These responses also indicate there is a disjuncture between recognising the need for such specific skills and investment in the training to support them. This disconnect may be particularly acute in certain skills which, in cases such as data analysis, algorithms, platform insights and graphic design, are unlikely to be provided

“ He’s our social media manager. Is that what your job is? We’ve never quite given him a job title - we make it up ” (IV32).

“ Before it was just me and I’d pretend I was a 21 year old woman and try and get the tone of voice and I’d sit and watch and tweet ” (IV13).

“ It’s got 99% of the DNA producing for TV but it’s that 1% that can make all the difference ” (IV8).

via on-the-job training within television organisations. But it may also be a pressure point on junior staff, who are increasingly expected to be equipped with these skills as ‘digital natives’ (IV5, 23, 39, 42, 55), at the same time as a wider de-prioritisation of training across the sector reduces the opportunities to learn as either part of the job or alongside work.⁴⁴ We explore the issues facing the development of multi-skilled practitioners, the expectations on junior producers and the opportunity gaps that exists at senior level in the sections that follow.

4.1 The Multi-skilled Production Team: Hybrid Roles and ‘Slash’ Careers

In some ways, social television work is characteristic of the wider rise of ‘slash’ careers: the bringing together of an established job with what may have started as a ‘side pursuit’, and takes this to a new level of integration (see Case Studies in this section). Alongside this, social television positions often represent a shift from integrating separate teams, to instead placing emphasis ‘on people who are multiskilled’ (IV48, and also 19, 31, 35, 39, 41, 42). Broadcasters, company owners and senior managers are looking for multiskilled producers and technical crew, able to produce social and digital content, but also able to shoot and/or edit in particular. As one employer explains: social media TV producers need to be able to ‘just grab a mobile kit [containing phone, gimbal, mic and headphones] ... go out and get content on the site’. Such multi-skilled production teams have significant cost-saving implications, as he explains: ‘It doesn’t need to be broadcast quality ... so we don’t need an entire crew and lighting set-up’ (IV41). At the same time, however, emergent platforms within this social mediascape may also require the adaptation of existing, more specialised, skills that are harder to fit within such hybrid roles: such as vision-mixing for Facebook Live (IV40) or great writing for comedy on social (IV4).

Increasingly, social media TV producers are also expected to be able to add one or more of the following skills to their job role (IV2, 19, 20, 31, 35, 36, 39, 41, 42, 48):

- Photoshop
- Video shooting
- Video editing
- Copywriting
- Design
- Analytics
- Marketing/Promotion

As the above list suggests, ‘multiskilling’ often relates to technical aspects of a job, but employers also put an emphasis on soft skills as part of the range they require for social TV production, including: sense of humour

(IV4, 5, 7, 10, 14); finger on the cultural pulse (IV10, 20); understanding of branding and tone of voice (IV8, 13, 14); and compliance and ethics (IV1, 2, 14, 31) among others. As one interviewee summarises, even ‘at junior level [we are] looking for someone who can do everything – edit, design, write and have great ideas’ (IV42). As another explains, ‘the line between camera and editor doesn’t really exist so we’re finding shooter/editors or producer/shooters or producer/editors who have multifaceted skills ... whether its After Effects, or animation, or shooting, editing, scripting or producing’ (IV39).

This imperative may be seen as part of a wider neoliberal trend in both media production and the wider economy towards job hybridity and portfolio or ‘slash’ careers, indicative of both precariousness and autonomy as a double edged sword for the freelancers that make up the majority of the sector.⁴⁵ With social media, hybrid job roles emerge as logical responses to not only these wider economic trends, but also to the fast-paced and visual nature of social media work (see Section 2.2). As one employer explained in relation to the ‘Producer/Designer’ roles in their company, we need them to ‘have design skills but ... have a more editorial mindset ... and create stuff really quickly’ (IV48).

Undoubtedly there are significant positives to the development of such hybrid roles. For those able to master the range of skills and produce high quality content, there are significant rewards available with a particular paucity of talent available to fill senior roles (see Section 4.3). Fundamentally, however, it is seen by many as a necessity: ‘there’s an argument you’re a jack of all trades and master of none, but that’s where the industry is going ... I feel there’s more work as a freelancer’ (IV56).

In turn, many see such roles as fundamentally underpinned by cost-cutting: ‘if you can get a shooter/editor then you’ve hit the jackpot as an employer because you’re getting one multiskilled person against the price of two people’ (IV56). Stories abound of people being asked to take on a different skill or task to save budget, forcing the development of multi-skilled producers, without necessarily providing training. This may lead to crew being taken advantage of in these roles: for example, one interviewee spoke of a series ‘Predator’ being paid less than a ‘series producer wage and yet shooting, producing, directing, editing’ (IV43). Such work can have long term implications for individuals and the sector as a whole: freelancers are constantly tempted by roles that ‘add another string to their bow’, which will ultimately reduce sector-wide needs for specialised skill sets. At the same time, as we discuss below, senior roles often rely on such specialisation. Finally, social media is also changing how work is advertised and found: 34% of 2017 survey respondents indicated social media was useful for finding production work, whilst 50% were using it for crewing up.

⁴⁴As Banks and Hesmondhalgh set out, the emphasis on training now lies predominantly with higher education institutions producing work-ready graduates. Banks, M. and Hesmondhalgh, D. (2009). Looking for Work in Creative Industries Policy. In *International Journal of Cultural Policy*, 15(4), pp.415-430.

⁴⁵Hesmondhalgh, D. and Baker, S. (2013). *Creative labour: Media work in three cultural industries*. Routledge: London. See also, Johnson, D., Kompare, D. and Santo, A. (eds). (2014). *Making Media Work: Cultures of Management in the Entertainment Industries*. NYU Press: New York.

Case Study: The Rise of the 'Preditor'

The hybridisation of roles within TV production is not a new phenomenon, with combinations of once distinct crafts such as producer and director now very much the norm.⁴⁶ However, as production teams adapt to the demands of content creation for myriad platforms, roles and skillsets are rapidly synthesizing into multi-'slash' jobs. One such role is that of the producer/director/editor or 'Preditor' (IV31, 35, 43). As one interviewee noted, some even add in 'shooter', playfully terming staff 'Shreditors' (IV56).

One self-described Preditor explained their role as 'to develop the project, the idea and then look at the logistics of shooting, lighting'. Then, working with kit that's been supplied by the production company, agency or broadcaster in-house team, jobs tend to involve 80% shooting to the script and 20% grabbing opportunities as they arise; for example 'if talent becomes available, then it's a case of quickly coming up with an idea and guerilla filmmaking'. For him, 'our bread and butter is giving the audience exclusive behind-the-scenes content and promoting what they can look forward to. It's all about selling the show' (IV56). When editing, he is finding that companies are increasingly adept at creating graphics and social media assets for him and other editors to access from shared drives to maintain production values and branding consistency.

In addition to shooting and editing social TV packages, 'live streamed content is becoming more popular ... it goes back to the idea of immediacy and getting the content out there' (IV56). And here, the multiskilled Preditor is also required to consider cross-platform marketing and promotion as 'you wouldn't just do a livestream on your mobile because nobody knows it's coming up. It would still need to be planned for people to know to tune in. So you tweet and post on all your social platforms to say you have the live stream coming up soon'. It thus falls to the Preditor to act as the producer of social media feeds, planning, prepping and organising other staff and then both editorialising, editing and even promoting their social television experiences.

Whilst such roles are clearly hybrid and emerging out of more junior members of staff experiences of 'slash' careers, the Preditor role exemplifies how the growing importance placed on social is leading to specialised roles that value the multiskilled worker for their ability to understand the specificities of social television.



4.2 The Time and Space of Social Television Production: 'Out of Hours Content Means Out of Hours Work'

Alongside social television staff's work being multi-skilled, it is also multi-sited and spans a range of working hours to respond to the 'always on' culture of audiences' use and expectations of social platforms. Whilst we discuss the ways in which social media production is integrated into television in Section 2, it is worth noting that even large-scale digital teams working on high profile live productions tend to be located on the periphery of the television crew. The social team is often to be found operating under bleachers, in portacabin control galleries, canteens and make-shift venues (FN 02/04/2016)



The Voice Digital Team (02/04/2016).

These peripheral spaces extend well beyond the workplace because of audience expectation for channel or programme brands to be 'always on' (IV4, 22), which leads to such teams being 'on call or available all of the time, seven days a week, 24 hours basically' (IV31). Such demands - from both employers and audiences - leads to a range of management techniques: from the deployment of rota systems, to the expectation of out of hours work through to self-exploitation as workers find it difficult to 'switch off' (IV2, 8, 10, 43).⁴⁷

It is commonly understood amongst industry workers of all levels that social media work for television means 'you need to work flexibly, evenings and weekends' (IV36), as this is 'not 9 to 5' job (IV35, 41). As one senior social producer succinctly puts it: 'out of hours content means out of hours work' (IV39). Whilst many spoke of trying to regulate their hours or 'not do work stuff after 10pm', this becomes impossible if, for example, 'talent have said/posted video' (IV12) or if you are live tweeting along with a transmission. As a result, the expectation has become that 'if you work in this area you need to work when you need to' (IV27).

This 'always on' element is fuelled by the use of personal devices that blur the boundaries between work and home, where working remotely is the expectation and norm (IV1,

2, 4, 5, 6, 13). Over 70% of respondents to our survey in both 2016 and 2017 indicated that staff 'Sometimes' or 'Often' undertake their social media work at home.

“ I have a sofa, a television, a wife on mute and ... a laptop which I log in to (our) systems. That is basically it ” (IV10)

The use of personal smartphones was crucial to this, with staff talking about using their phones to 'live tweet from the park with my children' (IV2), to posting across social media platforms in 'our onesies on Christmas Day' (IV5, IV57).

Nevertheless, many employers were 'mindful of [the] team's work life balance' (IV41), attempting to resolve this through the use of rotas or compensating for hours worked with time off in lieu (IV7, 21, 31, 35, 36). However, such rotas had proved 'quite a challenge' (IV24), whilst employers and employees readily admit that it is difficult to compensate for out of hours work (IV31, 35, 36). The disruption of social media to such work-life balance is more widely felt than just within dedicated social teams, with others discussing the danger of an 'always on' culture underpinned by smartphones leading to constant interruption on staff's 'days off [with] WhatsApp pinging ... they'd feel that they have to respond or ... feel guilty' (IV43).

There is arguably, then, an increasing expectation from both employers and employees themselves that staff should simply be able to manage such hours as required in the era of social television. This informs the hiring practice of social media agencies in particular, but also recruiting for social media roles more widely in the TV industry. As one social agency sets out: 'when people come and work for us they know it's evenings and weekend which ... is demanding for the staff' (IV4). This television executive sums up a widely held view that it would be impossible to hire a social media manager who 'thinks "oh I've clocked up an extra hour and a half this week therefore I'm owed time back in lieu"', noting her team works 7 days a week (IV30).

Staff can, in turn, internalise such expectations as a form of self-exploitation, with interviewees talking about the out of hours work as being 'my lifestyle anyway' (IV2, 23). Others note that whilst they are 'supposed to take a day or two off in the week', they would rarely manage more than one (IV31). Such work is often done passionately and with full awareness of the additional hours required. As another explains, 'it is the nature of the job - nobody forced me to work in social media and I understood when I took this route that it never switches off, always there ... [But this] doesn't mean you can't have down time' (IV8). However, 'there is also a certain stage in your career [when] you're "on" all the time - it's expected' (IV12), with junior staff often doing such work in order to develop the multi-skilled, hybrid work portfolio increasingly demanded in the industry.

⁴⁶ John Caldwell's work on production cultures documents this trend extensively across the 1990s and early 2000s US television sector: Caldwell, J.T. (2008). *Production Culture: Industrial Reflexivity and Critical Practice in Film and Television*. Duke University Press.

⁴⁷ 'Self-exploitation' is considered by a range of studies, but is not always negatively experienced, being a complex process that many workers undergo in attempting to balance the demands of a job, professional reward, career development and freelance labour. See for example, Evans, E. (2014). Transmedia Critical: "We're All A Bunch of Nutters!": The Production Dynamics of Alternate Reality Games. In *International Journal of Communication*, 8, pp. 2323-2343.

Case Study: Social Media Manager (SMM)

A pivotal role within social television is that of the Social Media Manager (Digital Content Producer and Community Manager are popular variations on this job role, with the latter incarnation harking back to the management of online communities). However its definition as a role in its own right is relatively recent - according to one Senior Exec at a social platform dealing with broadcasters and indies, 'the role I most often meet are Social Media Managers ... (it) is a role that was very very rare when I was at the BBC in 2012' (IV9). Broadcasters and larger indies are more likely to invest in someone undertaking this position either in-house or outsourced (Survey, 2017).

While it's become more formalised, the role still encompasses a varying range of responsibilities and skillsets, depending on the broader context and make-up of the team. One interviewee from a broadcaster describes the role there in terms of 'strategy and planning and defining tone rather than asset creation and production' (IV10) (the latter being outsourced to an external social agency). Another tells of graphic design and photography as being part of the requirements of the freelance SMM (IV6) working within a digital team of 7 on a primetime entertainment show for an indie.

Our ethnographic observation of a SMM working as the only dedicated social media-focussed resource (aside from the show's busy Exec Producer following and contributing to social media feeds as time allowed) on a live 3 hour magazine-style show evidences an extraordinarily broad remit and skillset (FN 13/11/16). Her role involves both planning and managing social activations and community interactions with viewers, talent and influencers across a range of platforms and devices at the same time as creating/posting assets to a pre-planned script and 'on the fly'. This is a fast-paced, quick-thinking role, which in a live TV studio production environment often requires sprinting from gallery to studio floor to grab shots of guests on a smartphone or create other ancillary assets. Along with managing simple graphics packages her position demands copywriting skills and capturing the tone of voice of the programme brand. SMMs 'need to be good at switching between different mind-sets and tone of voice and understanding what feels natural for one brand against another' (IV8). More than this, SMMs are often required to be the voice OF the show or brand and simultaneously a commentator ON it, which demands no little amount of skill, especially when undertaken in near real time.



Wrangling Multiple Screens - Social TV Work in the Production Gallery' (13/11/2016)

4.3 The 'Digital Native': A Social Media Natural?

Across the industry we see two contradictory impulses that impact acutely on who undertakes social media work for television, which job roles are developing, and the training and skills supplied and required. On the one hand, there are those who see younger generations as almost inherently not only multiskilled but also already 'doing it' on social media (IV5, 23, 24, 25, 39, 47). On the other hand, there are those who are adamant that the digital native notion is a myth and good social media work requires specific skills and training (IV2, 4, 6, 14, 20, 31, 38, 42, 55).

We explore both perspectives here but note that our findings suggest that companies able to generate new revenue streams from social are bound together by their relative unwillingness to trust social media work to junior staff: in both 2016 and 2017, 50% of non-revenue companies reported using junior staff, compared to just 36% of revenue-generators.

The Pro Digital Native

For many senior executives, it makes absolute sense to hire younger staff to work across the emerging hybrid roles that are defining social television production: 'many [younger staff] are on these platforms just as a matter of fact, it's more natural to them' (IV25). Owners and company directors discuss hiring staff without traditional television skills but who 'intuitively' understand social media spaces, expecting their thinking to be 'internet first, which is why we have our team of really young people' (IV23). Such an approach extends to utilising social media as an amateur training and recruitment ground, hiring staff who have successfully built followings on their own Tumblr, Snapchat, Instagram or other accounts (IV4, 5, 23).

The reliance on younger staff's knowledge of social platforms is especially true of newer platforms or services, which are less well-understood by senior staff. As one company owner admits, we 'work with young people who ... you're assuming are on the platforms you're interested in ... [for example] I'm now trying to use Snapchat, but it's not very natural to me. I work with people who use Snapchat all the time, and thank God because they can tell me how it works' (IV25). Junior staff are also relied upon to help promote and listen to audience feedback because they are 'quite savvy ... they will know that social is a good way for them to ... get the word out there, increase [the show's profile] and they will take a lot more notice' of the reaction to a programme on social media (IV20). Whilst this has the potential to exploit junior workers out of hours, many invest in such worker's development. One producer explicitly articulates how the value of such younger staff is particularly acute for youth

brands: we have 'upskilled young team members' for such brands who 'are Producer/Directors that could also edit', being able to shoot and package a story for their audience that has the right 'low fi' quality (IV40).

Drawing on younger staff assumed to have these backgrounds is seen to alleviate some need for training because the staff are already passionate about, and fluent in, social media (IV5, 20, 23). Company owners discuss how such a background means that whilst media courses train some of them, many are 'doing it themselves, [being] so knowledgeable' in social editing, filming, platform operations that they simply 'apply our sensibilities and culture to their skills' (IV47). The multi-skilled nature of such younger workers is seen as a particular virtue (IV39, 47, 55), bringing exciting 'combinations of creative skills' and an attitude of it being 'useful to learn to pick up a camera and frame and shoot and mic up or learn After Effects or whatever' (IV39). As another senior producer explains, 'everybody sorts of shoots, edits, and the people coming through that we employ, we've got a young team ... they've done a raft of this kind of stuff already' (IV55). In such a landscape of employment, the attitude and time commitment to simply 'being on' social media is likely to become an increasing requirement for junior staff. In turn, hybrid and 'slash' job roles will continue to evolve that have social media practice embedded alongside more traditional roles.

Some interviewees (IV21, 22) argue that this generational approach to social media is also reflected in on-screen talent's investment in such work: 'they buy into it', whereas 'in the olden days we would never have been able to have time with the talent' (IV21). In contrast, now talent are briefed from the outset: 'of course the younger talent are so aware and they love it, as they know it's promotional. It's giving them exposure. It works both ways. It's so easy to get them now as opposed to before in terms of when it was just online' (IV22).

The Digital Native Myth

In contrast, there are those who believe that simply 'being on' social platforms is insufficient experience or skill to run social media accounts or lead social productions for TV. As one senior social producer argues:

“I have never given it to a junior person ... You are trusting your brand with someone that might not understand how to represent you in the outside world. So it is the opposite for me. The person that gets that role to look after these channels has to understand creativity and understand the audience and the platform. Not just someone who is big on (social media platforms)” (IV6).

For those who are less willing to entrust such work to younger, 'digital native' workers, there is a greater emphasis on the strategic importance of social media to a company or brand's online presence and engagement with its audience stakeholders (IV42). In such companies, whilst it 'used to be that social was left to the work experience or the runner', there is now a realisation that 'it's a serious communication channel' (IV26). As another explains, there is a strong distinction between what people might achieve at an amateur level and what is expected at a professional level of social media television production - even if the aesthetic and production values remain relatively 'low fi' compared to TV:

“ People think anyone can make it themselves. They can have their own YouTube channel ... they can do Facebook Live, they can create something on Twitter. But that's not how you make a TV series compelling on social media ” (IV43).

Others found they have been caught out by the myth of the digital native, hiring staff for being the 'right age and experience to interact with contributors' for a youth show but then finding them not savvy enough in social media production to be able to work across the social tools used in production (see Section 3), leading to significant delays in workflow (IV43). However, even those that had less positive experiences of relying on 'digital native' producers agree that productions and companies could benefit from younger team members being more on social media and keeping an eye on how content was reacted to by audiences, trends and to discuss new ideas (IV31).

Whichever view companies adapt, overall there is a wider perception in the industry that whilst the tools and work of social media may be being democratised, it was also being formalised not only in terms of production values (see Section 3) but also production hierarchies.

4.4 Professionalisation, Formalisation and the Opportunity Gap at Senior Level

Social media is now clearly viewed by the majority of the industry as 'a very serious communication channel' requiring due attention to not only maximise its potential but avoid significant brand damage (IV26, 27, 28). This is leading to 'those digital roles becoming more professional' (IV25). For example, one commissioning executive reflects on the way in which the organisation started out with junior people operating

social media accounts, but as the broadcaster began to want 'quantification about every single moment of a programme', the realisation that a junior person wasn't necessarily 'doing anything bad' but didn't have the right skill sets to deliver such work became apparent (IV38). Similarly another broadcaster discusses how social television production has moved from a mixture of junior and 'out of hours' staff without clear remit to being incorporated into a 'proper marketing role' (IV7) (see Section 3). Moreover, as platforms themselves become increasingly subject to scrutiny - if not regulation (see Section 5 and 6) - there is a need for greater formal sign off on what content is placed on them and what production methods are utilised, including developing appropriate release forms and public liability statements and coverage (IV12).

However, filling such roles with more experienced social media producers is not straightforward. Many speak of a gap of skilled staff able to fill senior leadership roles across the sector:

“ We call them the one percenters - 1% of people who work in the television industry who not only understand what social media means to TV but take an interest in it and that's the sort of people we want to work with ” (IV33)

One successful digital agency explains how the company 'can't find skilled people at a senior level' for their social media work: 'there are very few businesses like ours, so it's difficult to hire skilled people at a senior level'. Indeed, such hybrid companies that sit across television, social and digital have become not only a key site of training for junior staff, but also a 'hunting ground for others who want people with this expertise' (IV47).

As with their junior counterparts, senior social leadership roles are seen as requiring multi-skilled staff able to build collaborative teams that range across television, digital, social and marketing skills to 'create a great social product' (IV7). Whilst senior staff are less hands-on in production, they are expected to be able to oversee compliance, ethics, build best practice and social media guidelines for brands, develop digital bibles for productions, brands and channels across several social accounts and platforms as well as deliver multiplatform and digital video content (IV30). Compliance, best practice and IP frameworks have been a particular focus for senior roles so as to develop guidelines and parameters that all those involved - from social media producers, to television counterparts, wider marketing



teams and even talent - can then work within without having 'lots of conversations with lawyers' (IV8, 14, 30, 35, 41, 55). Nearly all senior staff spoke of the need to have an 'escalation process' in case of errors and safeguards to prevent them (IV8), which includes examples of a 'two tick system', whereby social posts are checked by representatives of both digital content and television teams (V14). In contrast, the technology companies running social platforms are only just at the first stages of humanising editorial - and may benefit from senior social television leaders who are regularly expected to create bibles or documentation on aspects such as contributor care, audience engagement, tone of voice, casting, talent contract stipulations, and live streaming because 'you can have an absolute nightmare if anything goes wrong' (IV30; see Section 3.3). Most often these senior roles are responsible for a suite of programme brands, looking after social and digital elements to take 'a holistic view' of a company's slate, ensuring continuity and distinction of tone of voice for each programme brand (IV20).

For workers able to juggle this range of skills and responsibilities, there are significant rewards available, including the ability to negotiate production budgets and build new business models. Formalising and increasing the visibility of these senior roles can encourage and reward skills development for social television, enabling junior staff to envisage a career pathway for the more precarious and flexible work they might undertake at the outset of their jobs. Such steps are necessary to address the training and development structures within the industry that will otherwise lead to a continuation of the opportunity gap for the UK industry. Moreover, the impact of social television production is likely to inform the skills required within more 'traditional' television production roles as well. Whilst these are currently 'not fundamentally different as a result of social media', many believe 'that they're going to have to change' (IV34). As we explore in the next section, the impact of social television on the sector's 'core' or traditional business may be more competitive and challenging than many currently imagine.



Section 5: Platforms as Partners or Predators? Competition, Collaboration and Co-option

In late 2016, the Royal Television Society held an event on social media and TV entitled: 'Social Media Muscles in on TV', at which the platform operators sought to reassure the television industry they were 'TV partner, not predator' (FN, 11/30/2016⁴⁸). This fear is apparent in a number of interviewees' discussions of social media which, as with any new media form that vies for audience attention, is viewed by some TV producers as competition (IV6, 9, 24). Platform operators have sought to allay such concerns, offering a variety of support mechanisms to broadcasters and television production companies to reach audiences via their platforms. As a senior UK broadcasting executive sums up, 'both Twitter and Facebook want to develop that area. So they are very, very generous with their time' (IV7), whilst other industry figures note each platform seeks to position itself as the best possible partner to TV programme-makers and channels, offering free marketing spend, access to new applications, tools and additional support for broadcasters and television production companies to spark innovation (see Section 3.2). Many interviewees talk

about such collaboration positively but there are some who remain more wary about the relationship between television and social platforms - particularly as the latter have moved into direct commissioning of content and purchasing live streaming rights. As one interviewee sums up, any strategy for social media around television leaves 'you hostage to the platform themselves' and whatever their priorities may be (IV27).

We suggest that social media platforms are at once collaborators and competitors for the established television industry - co-opting television's tactics and strategies as often as they offer new opportunities. This section explores the shifting power dynamics that are occasioned by the pre-eminent role social platforms now play in the television industry's production and distribution of content, audience engagement, reach and analysis. It highlights that if television producers and channels do not address some of the opportunity gaps presented in this report, social media platforms may be only too happy to fill them: to the cost of some of television's more established players.

“ I think it has terrified (us) that (our) industry isn’t going to look the same anymore and then (we’ve) realised that “Actually, no it is just more spaces to create your world”. ... And it has gone from a negative, ... “it is all encroaching on our little fortress”, to them (platforms) banging on the door so much it has broken those down and now actually people see it as a real opportunity ” (IV38).

5.1 Shifting Power Dynamics: Slave to the Algorithm?

Interviewees from the broadcasters all note that it is important for them to have close relationships with the platform operators, (IV6, 7, 14, 39, 34, 55) whilst platform operators seek to position themselves as ‘the best possible partner to TV programmes, productions, channels and increasingly to the business side’ (IV9). Platform operators such as Twitter, Facebook, YouTube and Snapchat all have staff with responsibility for developing relationships with broadcasters and Indies that seek to foster collaboration. However, this collaboration undoubtedly brings a shifting power dynamic to broadcasters’ and independent production companies’ relationships with both the audience and each other, introducing a third partner into the equation.

For many this is an unsettling shift, which gives platform operators unparalleled power in the industry that is unique from the broadcast era and has the potential to leave both broadcasters and content makers at the mercy of platform operators. BBC Director General, Lord Tony Hall’s, speech in early March 2018 formally signalled the unease within broadcasting about the power of platform operators in the era of social television, strongly calling for greater regulation and collaboration.⁴⁹ The ability of platform owners to change algorithms and chase their own strategic priorities can leave content-makers and broadcasters constantly caught ‘on the hop’, with many reporting they find it hard to keep up with platform changes and tools (IV31, 35, 39, 47, 48). Whilst this can promote a spirit of experimentation and innovation (see Section 3.1), it also leaves producers at the ‘behest of the algorithm’ (IV24), requiring them to constantly shift and adapt their practices. Thus producers talk about changes to algorithms on a variety of platforms leading them to abandon previously successful tactics like live posts for a show on Instagram, which no longer promotes chronology and instead is better used for ‘random pictures that are about the show which will really entertain people’ (IV35), or posting longer videos to YouTube as watch time is prioritised on that platform (IV39). Ultimately, the shifting priorities of platforms can have a significant impact on audience experiences. Whilst most high profile debate focuses on ‘fake news’, it is also clear that the shape and diversity of audience’s wide-ranging cultural experiences are being influenced and increasingly narrowed.⁵⁰ Platform priorities also determine how success is measured and defined in social television (see Section 1.2): ‘YouTube, Facebook and Twitter as platforms have their own road maps of what they want to grow into and become ... So the stuff that we measure follows some of the trends of [how] they seem to be favouring this [form] over that ’ (IV39).

In this regard, it is perhaps broadcasters who are most keenly aware of the way in which platform operators’ new roles as intermediaries has placed taken-for-granted assumptions about their relationship and ability to reach audiences into question. The BBC’s publicly-funded status leads to peculiar ambiguities around collaboration with social platforms, but it also raises broader questions around how relationships with audiences are changing in an era of social television. As one senior BBC executive highlights, the rise of platform operators has created a dilemma for broadcasters:

“ The tricky thing there is that we’re completely reliant on the social networks. ... They keep changing what their own priorities are. And in a way that shows you what sort of a dilemma it is because we’re beholden to (social platforms’) algorithms and what they decide is going to be the thing that they want to promote. ... if they want native video to be the thing, so people consume video on (their platform) then that’s tricky for us because we want people to consume the video on (our sites and services) ... we want their primary relationship to be with us, a public service broadcaster, rather than with some Silicon Valley giant ” (IV34).

As a result a crucial KPI for the use of social media for the BBC has become how they ‘bring people back to the [broadcaster] ... that is our primary metric. The one that we are most obsessed with’ (IV34). As another experienced BBC producer explains, this is not simply about competition for eyeballs and attention but goes to the heart of the broadcaster’s relationship with the audience: ‘these platforms are not commercially agnostic and ... to the extent that they can be said to have an editorial policy at all, which I guess they do, it is not the BBC’s editorial policy’ (IV11).

The tensions that broadcasters experience in managing these new relationships with platform operators and audiences has led some to argue broadcasters lock down rights and, thus, can stifle innovation and creative risk - not only within the broadcasters, but for independent producers who are prevented from exploiting opportunities around social television (see Sections 1 and 6). As one production exec notes, both the BBC and Channel 4 have reduced the size of their teams because ‘there isn’t the business model [for them]: they know [social] is important, but they can’t quite work out how to quantify that importance’ (IV13) within their

⁴⁸Bell, M. (2017). Why Social Media Needs TV. *Royal Television Society*. [online] Available at: <https://rts.org.uk/article/why-social-media-needs-tv>. [Accessed 2 Mar. 2018].

⁴⁹Davies, C. (2018). Tony Hall: BBC must fight US tech firms to protect British values. *The Guardian*. [online] Available at: <https://www.theguardian.com/media/2018/mar/04/tony-hall-bbc-fight-us-tech-firms-protect-british-values> [Accessed 5 Mar. 2018].

⁵⁰Lewis, P. (2018). “Fiction is Outperforming Reality”: How YouTube’s Algorithm Distorts Truth. *The Guardian*. [online] Available at: <https://www.theguardian.com/technology/2018/feb/02/how-youtubes-algorithm-distorts-truth>. [Accessed 8 Feb. 2018].

traditional remits and terms of trade. Paradoxically, the difficulty in resolving such tensions may enable social platforms to colonise spaces traditionally seen as owned by broadcasters, increasingly moving into commissioning content and attaining live rights.

Despite such tensions, many feel that the power of social media platforms is only likely to increase and will further drive partnership with the television industry: leaving some producers and broadcasters feeling there is little alternative but to seek out collaborations. As one producer explains, '[Their] algorithms ... define what people see. So actually working in partnership with them on anything at least gives you a better chance of your material being seen which is, you know, as far as I am concerned is a good thing' (IV30).

5.2 Collaboration: Partner not Predator?

“We're really in bed with all the platforms because they want us to use them as a platform to innovate ... So we know those guys on all the platforms really well and ... we will absolutely work really closely with them” (IV48).

Given the power of such operators, it is perhaps unsurprising to find that content-makers and digital agencies, in particular, discuss the need for good relationships with platform operators (IV8, 23, 30, 32, 35, 38, 47, 48). The advantage of direct contact with the platforms is that they can offer access to new tools, insights and even marketing power. Indeed platform operators may cover significant production items and approach rights owners for major brands or events 'because they want it to look good [on their platform]. ... They're then taking this to other people as a showcase to say, "this is what [our platform] can do for you"' (IV48). Such 'loss leaders' are not uncommon across a range of platforms, with Twitter, Facebook Live and YouTube all cited as examples where such investment in brands/events takes place. As one head of a digital team explains, particularly with new services, platform operators 'are desperate to be doing stuff partnering with big production companies ... [to show] advertisers that quality content can live on their platform' (IV30).

As such, the power dynamic between content makers and platform operators appears to be a two-way street: producers get a chance to experiment with new creative tools and approaches whilst the platform operator can ensure the conversation related to a big brand takes place on their platform. As one platform executive explains: 'We don't walk in and say you must do and we want that. It's not our moral. Our moral is that "here's a platform, use it as you want to or don't use it at all if you don't want to"' (IV29). Yet, there is also clearly a power dynamic in

play that requires content-makers or social agencies to build a strong strategic understanding of each platform operators' priorities and needs in order to be successful. As two company owners discuss:

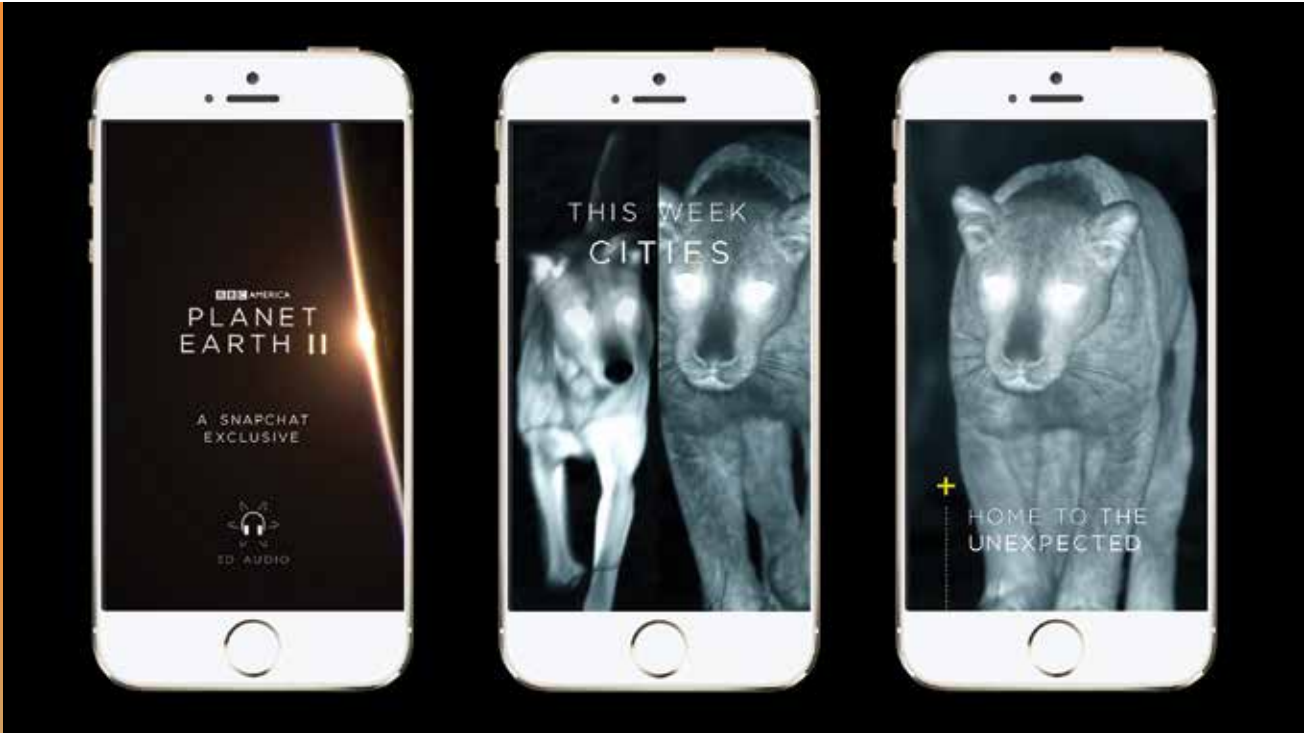
“Staying on top of evolutions of platforms is crucial ... we get the platforms in a lot to come and tell us what they're up to next that we should be aware of” (IV48).

“We work directly with each platform to be the first to know about what is coming next. We spend a hell of a lot of time ... in these social spaces. All of our staff live in these spaces” (IV23).

For some, the understanding of a platform can be so deep that it actually informs the platform operators' knowledge and strategies around social television. Thus one agency senior executive discusses how certain platforms do not 'ironically [have as] deep a knowledge of their own platform as we do because they're not doing the day to day insight' in social television (IV47). This has enabled the company to develop a relationship where they provide such insights to platform operators and develop business growth through new opportunities that arise as a result.

More widely, the insights shared by platform owners with production companies and broadcasters are increasingly granular. One interviewee boasts of how this analysis can be achieved 'second by second', enabling content producers and distributors to understand who the actual audience is and how they are responding rather than who the producer perceives them to be (IV29). As this platform executive argues, the result of such insights is that 'TV producers can adapt ... if they knew all along which jokes made everyone roll over with laughter, they would have done more like that' (IV29). As another suggests, in relation to individual programme brands, 'the television is only the first screen for one hour a week, the rest of the time the first screen is a mobile device in a kids' hands or it's a laptop at work or whatever', which is where social platforms can maintain connections and offer audience insights that are crucial to brand recognition and survival in the post-broadcast era (IV9). He goes on to observe, audiences 'no longer exist on a single screen, people exist on several media at the same time, if you want to be effective you need to be on all ... otherwise one will win' (IV9). As social platforms increasingly begin to act like channels or broadcasters the question of who might 'win' becomes more acute.

Case Study:
Snapchat / BBC Studios / BBC Worldwide
Planet Earth II Collaboration



In February 2017, BBC Worldwide announced a collaboration with Snapchat which was ‘all about taking a mobile-first approach to our amazing natural history landmarks. And reaching untapped audiences to showcase jaw-dropping content on Snapchat’ (Tim Davie, BBC Worldwide CEO⁵¹).

Launching one day before the landmark TV series ran on BBC America and BBC Earth in Canada, the six Snapchat episodes were released weekly, running 3-5 minutes each, on the same topics as the televised series but featuring unreleased footage. Appearing in the Discover section of the app, Snapcodes enabled users both to subscribe and to access episodes after they’d ‘aired’ and been removed from Discover, ‘essentially prolonging the shelf life of content on Snapchat’s otherwise-ephemeral platform’⁵².

Paul Deane, Digital Development Lead at the BBC’s Natural History Unit (part of BBC Studios), spoke of the adaptations to production practice that working on the Snapchat series engendered: ‘the brief was to do it at a high production value, with an original score and original narration [by actress Sophie Okonedo] ... and putting on captions and tracking graphics to highlight the bit you’re meant to be looking at, which particularly works well for “sound-off”’. We planned the video so that across 15 or so snaps as soon as you touched the screen you jumped to the start of the next chapter. So basically we split up the story into 15 chapters, and made sure that when you Snap to the next one you immediately get the important info. You always hit the audience with the key part of that

story so even if you only get the first three seconds of each Snap, you’ve still got a good idea of what the story was. So each is like a mini chapter of a book’ (Interview 25/10/2017).

As well as issues of maintaining *Planet Earth* brand values, handling narrative form and designing graphics for the specific demands of the Snapchat platform, the vertical format for mobile meant taking shots from rushes and ‘cropping in on that vertical 1080 slice of 4k video which then meant we could pan within a shot’ (Deane). In addition to visual experimentation and adaptation, sound for the video was a full spatial sound mix for a 3-D listening experience (particularly on headphones).

This comment from Nick Bell, VP of Content for Snap Inc., conveys the platform’s strategic interest in commissioning original series connected to high-end brands such as *Planet Earth II*, ‘For millions of Snapchatters, our app is their first screen – and this will be their first introduction to the unbelievable cinematic quality, storylines and stunning visuals of the *Planet Earth* franchise. We saw a unique opportunity to work with BBC Worldwide to reimagine *Planet Earth II* for our platform’⁵³.

Such collaborations between broadcaster/producers and platforms have the potential to mutually broaden audience reach – in this particular case by attracting a wider market to the Snapchat platform through landmark franchise association as well as, in turn, introducing the ‘untapped’ ‘Snapchatter’ demographic to the wonders of the BBC.

⁵¹BBC. (2017). BBC Worldwide and Snap Inc. Announce Unique Content Partnership to Bring Planet Earth II to Snapchat Shows, *BBC*. [online] Available here: <http://www.bbc.co.uk/mediacentre/worldwide/2017/snapchat>. [Accessed 9 Jan. 2018].

⁵²Lunden, I. (2017). BBC Jumps into Snapchat Shows with Planet Earth II; Snap expands Snapcodes, *TechCrunch*. [online] Available here: <https://techcrunch.com/2017/02/06/bbc-jumps-into-snapchat-shows-with-planet-earth-ii-snap-expands-snapcodes/>. [Accessed 9 Jan. 2018].

⁵³BBC. (2017). op. cit.



5.3 'Channels' in the Stream: Social Platforms as Broadcasters

“Twitter (is) the world’s biggest sofa”

Dan Biddle, former Director of Broadcast Partnerships, Twitter (Interview 01/03/2016)

Collaboration, however, can easily bleed into competition. As platform operators garner a better understanding of audience behaviours that point to the continuing popularity of television, or television-like, experiences we can see social media platforms often acting like broadcasters: from commissioning content to acquiring streaming rights for live events to adapting a range of television production strategies.⁵⁴ This is driven by the huge appetite for video online: over 500 million people watch video on Facebook every day, whilst by 2021 video IP is expected to represent 82% of global consumer Internet traffic (up from 73% in 2016).⁵⁵

In such a video-dominated environment, some interviewees discuss social media platforms as increasingly acting like ‘TV channels’ (IV11, 20), developing a kind of schedule around their acquisition of live streaming rights (IV29). This appears especially acute in the case of Twitter, who in the space of the same month in late 2016 made a series of announcements that signalled a greater emphasis on the televisual within its feeds. Thus, whilst on the one hand it reported the culling of Vine to indicate a departure from traditional ‘social’ content and experiences (short form, shareable, user generated), on the other declared a greater move into the broadcast space (longer form, live, professionally created, communal) via the acquisition of its first non-US live sports streaming rights - Australia’s pre-eminent horse race, the Melbourne Cup.

Twitter, however, is not alone in this regard, with most social platforms beginning to put more money into

content and testing ad revenue models (IV24). All the major social media platforms have co-opted a range of television tactics, including experimenting with the purchase of live broadcasting rights, commissioning content from established TV players and partnering broadcasters for online video. These strategies range from enhanced collaboration to more direct competition. Thus, whereas YouTube has become a ‘default online player’ for broadcasting partners like Sky News, embedding a ‘YouTube live stream of the Sky news platform’ (IV29), Facebook, YouTube and Twitter have offered sports rights holders the ability to bypass broadcasters. Facebook’s partnering with major global sports brands, such as Barcelona Football Club, enable clubs to reach international audiences with the platform operating like a broadcaster to offer advertisers the opportunity to purchase mid-roll ads within live content ‘sequencing five or six to mimic a traditional TV ad buy’ (Joseph, 2017⁵⁶). Twitter has, for example, owned NFL live streaming rights in the US and developed its very own ‘Wimbledon Channel’⁵⁷ to stream coverage from its partnership with the All England Lawn Tennis Club, whilst YouTube added Manchester United to its roster of top-tier global football brand channel partners in early 2018.

Beyond competing for live streaming rights, social media platforms have slowly but surely stepped up their bid to act as commissioners, filling a gap left by broadcasters, who some argue have been slow to adapt and fund social television content (see Section 1):

“I think the traditional broadcasters are very slow to adapt. What you’re seeing is the emergence of new publishers and new broadcasters going “if you’re not going to do it, we will” and they’re filling in some of those gaps whilst everyone starts to catch up a little bit” (IV40).

⁵⁴Bennett, J. and Strange, N. (2018). Twitter: Channels in the Stream. In Johnson, D. (ed). From *Networks to Netflix: A Guide to Changing Channels*, Routledge: New York, London.

⁵⁵Sources: Templeman, op. cit (2017). *Cisco Visual Networking Index: Forecast and Methodology 2016-2021*. Last updated 15 September 2017.

⁵⁶Joseph, S. (2017). World’s Biggest Football Clubs rethink Facebook Live, *Digiday*. [online]. Available at: <https://digiday.com/uk/worlds-biggest-football-clubs-rethink-facebook-live/amp/>. [Accessed 3 Feb. 2017].

The opportunity gaps of the established television industry's use of social media may therefore be filled by platform operators themselves - producing new power dynamics across the sector. A brief timeline of social media platforms' experimentation with live streaming rights and commissioning original content highlights how platform operators have challenged the established order of the broadcaster-led television industry, offering both new opportunities and threats to producers:

- May 2007, YouTube launches its Partners Programme to help encourage a community of higher quality and popular content creators;
- January 2010 YouTube announces its first deal for live streaming of major sports, with a global contract for Indian Premier League cricket. The same year it launches its 'Partner Grants' programme to directly fund eligible partners;
- 2015 Snapchat commissions its first show for the platform's new Snap Channel 'Literally Can't Even' (2015), which kept faithful to the 'self-destruct' USP of the platform, but was widely panned⁵⁸;
- 2016 YouTube's subscription service, 'Red' (launched 2015), commissions its first UK production from Princess Productions: *Dan & Phil's Amazing Tour is Not on Fire*. Throughout 2016 YouTube increasingly looks to use 'existing talent with an established fanbase'⁵⁹, pairing social media talent with television production companies (IV12). By the end of its first 'season' Red originals claim to have totalled nearly 250m views⁶⁰;
- April 2016, Twitter announces its first US broadcast deal for 10 live Thursday night NFL games - worth a reported US\$10m for one year;
- July 2016, ahead of its NFL coverage, Twitter experiments with live streaming of broadcast footage

from Wimbledon via partnership with All England Tennis Club and ESPN, developing a dedicated 'channel' and expansive rights package in 2017;

- February 2017, Snapchat commissions A+E Networks for first original Snapchat Show which represents a new tier of content separate from Discover, produced by third-party partners, and Stories, produced by users. Snapchat Shows also don't disappear after 24 hours, unlike other Snapchat content. Their strategy has included aggressively moving to sign youth-skewed talent such as Kylie Jenner's 'original' Snapchat Show - to be produced by E! Network;
- February 2017, Facebook launches 'Ad Break' service in the US for all forms of video content, making mid and pre-roll adverts available in Beta testing to a small number of partners, including live, on-demand and uploaded video. Revenue is shared 45/55 in content-owners favour;
- August 9th 2017, Facebook launch its new 'Watch' service, with a view to 'fostering community' that emphasises amateur production but also includes new commissions in the US, such as 'Returning the Favour' hosted by longtime Discovery Channel stalwart Mike Rowe;
- September 2017, YouTube Red commissions Left Bank Productions to make the platform's first UK drama;
- January 2018, YouTube radically alters its Partner Programme in the wake of the Logan Paul scandal, restricting access to creators who have over 1,000 subscribers to their channel, and a total of 4,000 hours of video viewed over the previous 12 month. The move is likely to prioritise professional content creators.

⁵⁷Connelly, T. (2017). Twitter to Live Stream Wimbledon Channel, *The Drum*. [online] Available at: <http://www.thedrum.com/news/2017/06/29/twitter-live-stream-wimbledon-channel>. [Accessed 22 Feb. 2018].

⁵⁸For example see Kosoff, M. (2015). Snapchat's First Original TV Series is Terrible, *Business Insider UK*. [online] Available at: <http://uk.businessinsider.com/snapchats-literally-cant-even-is-terrible-2015-2?r=US&IR=T>. [Accessed 17 Jan. 2018].

⁵⁹Farber, A. (2016). YouTube Red Seeks Big Ideas, *Broadcast*. [online] Available at: <https://www.broadcastnow.co.uk/youtube-red-seeks-big-ideas/5106729.article>. [Accessed 17 Jan. 2018].

⁶⁰Popper, B. (2017). YouTube Red Originals Have Wracked Up Nearly 250m Views, *The Verge*. [online] Available at: <https://www.theverge.com/2017/6/22/15855570/youtube-red-originals-250-million-views>. [Accessed 17 Jan. 2018].

Despite the evident rise in interest in television from social media platform operators few in the UK industry appear to view social platforms as viable competition or new revenue streams for content makers. One disjuncture between the social media platforms' strategies and the use of social media by the UK television industry is particularly striking: whilst Facebook, Twitter, Snapchat and others have increasingly utilised their platforms for live streaming, only 19% of our survey respondents regarded these platforms as useful for this purpose. This suggests that platform operators are themselves plugging a significant opportunity gap by moving into live streaming rights whilst, at the same time, partnering with existing television players to promote their platforms as spaces for marketing, promotion and audience engagement that benefit their core business. Consequently, social media for television continues to be viewed predominantly as a cost for television industry players - most often associated with marketing. Across two years of our Pact survey, just 17% of new-revenue generators identified digital commissions as a new revenue stream, totalling just 6 companies that gave examples such as Facebook Live, Mashable and YouTube as funding new content.

Some are sceptical as to the level or kind of funding provided by social media platforms as commissioners (see Section 1), cautioning that 'commissions' from social platforms rarely involve direct cash budgets but instead are largely made of equivalent support in marketing spend on their platforms: 'it is actually fake money for them because it is just going straight back into the platform' (IV30). Others argue it will be some time before platforms have shows that are meaningfully independent of traditional linear programmes as:

“They don't have a reputation for it and they don't have the commissioning behind it and they don't really understand audiences” (IV24).

For this interviewee, the reliance on the algorithms of the platforms could ultimately be a hindrance as 'they are algorithmically ... not editorially based' (IV24), which may only further reinforce the separation of creatives from marketing or technologists discussed in Section 3.

However, dismissing or ignoring the rise of social media platforms as competition may be a risky business. British producers would do well to look at the success of Tencent in China, which has moved from being a social media platform to a multiplatform media conglomerate that is now the number one destination for online

video in the country, with their platform providing an increasing offering of live streams and original content (Variety, 2017)⁶¹. Already some interviewees identify how broadcasters, rights-holders and content-makers alike are finding social media platforms low-cost, robust and reliable partners for reaching audiences that also enable them to avoid the red-tape of regulation that might come from setting up as a channel or distributor directly. Whilst compliance, ethics and brand values remain crucial waymarkers for navigating such spaces that the UK's television industry is hugely experienced in (see Section 3.4), the posturing of social media operators as 'just platforms: a bundle of technology and functionality that tries to help anybody who is looking to build an audience for that video or build a community' (IV29) is enabling traditional broadcast rules and regulations to be bypassed.

However, the status of such platforms as a 'wild west' (IV34) that are beyond regulation may fast be changing as social media giants increasingly behave as television channels. Recent scandals, such as Logan Paul's video⁶² of an apparent suicide victim in Japan, have led to YouTube adopting a manual, human, review of its leading channels⁶³ to reassure advertisers. Previously, in 2017, Facebook had taken similar steps to employ over 3,000 staff to moderate Facebook Live⁶⁴ content after a live 'broadcast' of a man killing his daughter was posted on the platform. This may suggest that from live streaming, to commissioning content, to compliance and ethics, social media is learning the lessons of television's past to secure its future; competing, collaborating and co-opting the television industry as it goes.

Across Section 5 we have set out how platform operators, as more than just 'bundles of technology', have become firmly inserted as powerful intermediaries between broadcasters and their audiences, including taking on some of these relationships more directly. However, as these technology giants are not regulated in the same manner nor - as in the case of the BBC - funded by the public, their self-defined duty of care to audiences and to the vitality of wider UK public culture is much less well-developed. This is not to critique the platform operators alone, but rather to highlight the way in which the current disjuncture between television's broadcast-informed regime and social platform operator's algorithmic approach may not be in the best interests of either industry or the audience in a future social television landscape. Each bring important understandings of how to engage, challenge and harness the power of audiences. For such power to be used for the benefit of UK plc and British public culture, however, will require greater formal collaboration on issues like compliance.

⁶¹Frater, P. (2017). Streaming Video Subscriptions hit 43 Million at China's Tencent, *Variety*. [online] Available at: <http://variety.com/2017/digital/asia/streaming-video-subscribers-hit-43-million-at-chinas-tencent-1202615443/>. [Accessed 31 Jan. 2018].

⁶²BBC News. (2018). YouTube Punishes Logan Paul over Japan Suicide Video, *BBC*. [online] Available at: <http://www.bbc.co.uk/news/world-asia-42644321>. [Accessed 22 Jan. 2018].

⁶³Hern, A. (2018). YouTube to Manually Review Popular Videos Before Placing Ads, *The Guardian*. [online] Available at: <https://www.theguardian.com/technology/2018/jan/17/youtube-google-manually-review-top-videos-before-placing-ads-scandal-logan-paul> [Accessed 1 Feb. 2018].



The shift towards proactive and humanised, rather than reactive and algorithmic, approaches to compliance by social platform operators offers an important opportunity to share best-practice and knowledge between these industries, developing mutual approaches to compliance and ethics in social television. The continuation of a two-tracked approach will only exacerbate the opportunity gap of social television, leaving television broadcasters and the Independents who supply their content hamstrung by the legacy of compliance cultures whilst simultaneously leaving UK audiences at the mercy of market forces that have thus far proven unable to deter Fake News agendas, filter bubbles and echo chambers that undermine public trust and notions of shared culture. In both cases, advertiser needs - which ultimately power both economies - are as poorly served as are the public themselves. It is thus, economically and culturally, imperative to find better shared solutions to these challenges.

Calls for 'public service algorithms'⁶⁵, which position broadcasters' recommendation systems as differentiated

from the narrow filter-bubbles of social media platforms, might thus be extended to place an obligation on platform operators themselves: either having a broad duty of transparency in how their algorithms prioritise content or having a duty of 'due prominence' for UK PSBs - much as digital television platform operators have long been subject to. Whilst platform operators are likely to resist such steps, their increasing move into broadcasting live events, providing editorially-led content offerings and manually reviewing content will undoubtedly have unpredictable results on the shape of this emergent industry. At the same time, social television represents a landscape in which, for the first time, broadcasters do not own or control the spaces in which their products and brands appear. The opportunity gap resides in addressing the inadequate regulatory structures that currently exists for for both industries, whereby compromise and collaboration - rather than competition - may produce more favourable results for industry and audience alike as social television evolves.

⁶⁴Gibbs, S. (2017). Facebook Live: Zuckerberg Adds 3,000 Moderators in Wake of Murders, *The Guardian*. [online] Available at: <https://www.theguardian.com/technology/2017/may/03/facebook-live-zuckerberg-adds-3000-moderators-murders> [Accessed 2 Feb. 2018].

⁶⁵In 2016 the European Broadcasting Union held a debate on the role of public service algorithms in European culture, sparked by RTBF's big data expert Pierre-Nicolas Schwab calling for 'a global reflection on how our algorithms need to be shaped to reflect our values ... [in order to] pave the way for better practices that will inspire other organizations in different industries'. See EBU (2016), *EBU*. [online] Available at: <https://www.ebu.ch/news/2016/07/big-data-initiative-striking-the-right-balance-for-public-service-algorithms>. [Accessed 2 Mar. 2018]. See also James Bennett's call for public service algorithms in Bennett, J. (2015) Create Public Service Algorithms, *Open Democracy.net*. [online] Available at: <https://www.opendemocracy.net/100ideasforthebbc/blog/2015/09/14/create-public-service-algorithms/>. [Accessed 2 Mar. 2018].

Section 6: The Future

The extensive use of social media tools, strategies and business models documented in this Report suggests we are undoubtedly entering into an era of social television. Yet it is one that many in the industry believe is still to be cracked successfully on a range of levels: commercially, creatively and competitively. One possible barometer for measuring the success of UK social television production may be the future of BBC3: as the channel focused entirely on youth audiences and existing only online, it is most in need of proving 'the value of forms of content' in this space (IV42), acting as a crucial testbed for social television.

Without future casting this final section briefly sets out some key forthcoming challenges and opportunities facing the development of UK social TV:

- **Live video:** The role of live video on social platforms is likely to grow in importance, not just for professionally created content and streaming of major events, but also as a social sharing experience - over 1 million people already live stream daily via group video chat, *Houseparty*⁶⁶;
- **Untapped potential of Messaging Apps:** Messaging platforms like HouseParty, WhatsApp and Messenger offer as yet under-explored tools for audience engagement at the same time as they are increasingly integrated into social television production modes;
- **China's Lead:** The *WeChat* platform in China offers intriguing - if ideologically complex - examples of ways to engage and connect with audiences that merge social networks, live and professionally created video, including the recent addition of identity verification for government⁶⁷;
- **Platforms as publishers:** As social platforms' similarity to broadcasters and publishers grows via their moves into content creation, live streaming, scheduling and humanised ad-sales strategies, there will be a corresponding increase in platform operator's self-regulation efforts. A strong voice from the UK television ecology, and its foundations and ethos rooted in public service broadcasting, has an important role to play in shaping these debates;
- **Artificial Intelligence:** Greater integration of AI-powered experiences on social media will raise further complicated questions around ethics and compliance for broadcasters, content-makers and platform operators;
- **The Immersive turn:** Immersive technologies, content and experiences loom on the horizon as a fresh challenge to the UK television industry and creative sector more widely.

We want to conclude by focusing on how social television may be affected by immersive briefly, which is highlighted in the UK government's 2017 industrial strategy as a key area for creative industries growth - earmarking £33m in 'audiences of the future'⁶⁸ R&D, collaborative demonstrator programmes and a centre of excellence in skills and training. Social platform operators clearly see immersive as a key component of their future strategies: in December 2017 both Facebook and Snapchat launched AR filters/lenses. Television will be a key part, partner and competitor in how social platforms attempt to capitalise on the growing interest in immersive experiences. Snapchat first trialed AR with television partners Netflix, using its sponsored World Lens service to promote season 2 of *Stranger Things*⁶⁹ to enable audiences to visit Joyce Byers' living room from the programme's world, replete with hints of the show's creepy 'upside down'. But whilst these experiences take place through social platforms, and are shareable in the sense of one user being able to 'pass it onto' another, the move in to truly socially immersive experiences is being pioneered by Facebook Spaces, which enables users to interact with each other in virtual worlds. Facebook Spaces links the social platform with its hardware tech - Oculus Rift - suggesting how platform operators are in a strong position to capitalise on the immersive turn in social television.

Immersive social TV is likely to require a greater fusion of skills in workers within the sectors - indeed, industry leaders called for 'image makers combined with coders' at a 2018 British Screen Advisory Council meeting on immersive (FN 25/01/2018). According to Professor Andrew Chitty, AHRC Creative Economy Champion:

“There's a growing recognition that we need a new skill for television in a social media world - one that fuses creative, editorial and tech skills within production. Industry is crying out for people who are able to bridge the gap between code and visual composition, between engineering and editorial ... who are fundamentally good communicators with a great understanding of online and linear”
(6th February 2018).

⁶⁶Constine, J. (2016). You Rarely Livestream, but 1m Livechill on Houseparty, *Tech Crunch*. [online] Available at: <https://techcrunch.com/2016/11/21/the-internet-third-place/>. [Accessed 6 Feb. 2018].

⁶⁷Wildau, G. (2017). China Unveils Digital ID Card Linked to Tencent, *Financial Times*. [online] Available at: <https://www.ft.com/content/3e1f00e2-eac8-11e7-bd17-521324c81e23>. [Accessed 6 Feb.2018]; with thanks to Lisa Lin for her (as yet) unpublished work on WeChat and Tencent.

“ Innovation in social is still yet to come. I don't think that it has been cracked ” (IV32).

Training at Higher Education, Further Education and Professional levels that develops skills across computer science, media production, engineering, marketing and communications is therefore an urgent necessity. The current disunion between science and humanities at A Levels, however, hampers the ability to develop these skills for future generations. We believe the fusion of STEM subjects with Arts and Humanities - STEM to STEAM - will be a crucial priority for training future workers in the social television ecology and wider creative industries. Television's long history as a social media - one that is built around communal experiences - suggests that core creative skills from the industry will continue to be adapted to such new forms.

Immersive social is also likely to throw up further legal issues around not just intellectual property rights, but also to push compliance and ethics into new dimensions: including a developing duty of care for contributors and also users, whose experiences of immersive worlds may expose them to real world dangers - from the psychological to the physical. Future social television experiences may have to remind users to 'mind the reality gap' in addressing the issues that will emerge in the sector's opportunity gap.

In the immediate future, adaptation, commercial challenge and opportunity, creative innovation and competition will continue to be the hallmarks of social television.



⁶⁸See <https://www.gov.uk/government/collections/industrial-strategy-challenge-fund-joint-research-and-innovation>.

⁶⁹Johnson, L. (2017). Netflix's Immersive 'Stranger Things' Snapchat Lens Transports You to Joyce Byers' Eerie Living Room, *Ad Week*. [online] Available at: <http://www.adweek.com/digital/netflixs-immersive-stranger-things-snapchat-lens-transports-you-to-joyce-byers-eerie-living-room/> [Accessed 7 Feb. 2018]





Acknowledgements

The authors would like to thank our 57 interviewees for being so generous with their time and insights along with our focus group contributors. We are grateful to John McVay and all of the team at Pact (www.pact.co.uk) for partnering with us on the industry focus group and two surveys of their membership. Our thanks also to Professor John Ellis, Principal Investigator on ADAPT (www.adapttvhistory.org.uk), and to the rest of the ADAPT team, as well as to all our colleagues within the Media Arts Department at Royal Holloway, University of London.