

Culled from the headlines of the TV Industry's Trade Press, **CONTENT MATTERS** is a Bi-Monthly Newsletter curated and contextualized by **KATZ Content Strategy's Bill Carroll**.

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**INSIGHTS
TO KNOW**

1. Generation Z - Who are they?

The first generation to grow up entirely in the digital world has very different media habits and sensibilities.

2. Why Premiere Week still matters in 2016

The Big Four broadcast networks will cram the premieres of around 50 shows into a single week. Does it still matter to viewers? to networks? to advertisers?

3. A closer look at CBS ALL ACCESS

Will the pioneering 'studio portal' stress vertical integration over content curation? What new lessons can be gleaned from the Tiffany network's digital strategy?

4. Screen Size Matters

Nielsen-Backed Study Finds Higher Ad Recall for Shows. Year long, Council for Research Excellence study finds television is still "the thing."

5. How a Show about Nothing Changed Everything

A new book, "Seinfeldia", reminds us about what TV does best- creating lasting characters that we love to visit again and again.

These are the characteristics about Generation Z that were showcased on the CTAM SMARTBRIEF website. The generation represents 23 million Americans born between 1994 and 2010.

Generation Z were born during the financial meltdown and do not know a world without the internet. Research shows that they are likely to become the most entrepreneurial, conservative, diverse and educated generation in the world. From a demographic and economic standpoint, this will be the first majority non-white U.S. generation. Generation Z will be 40% of U.S. consumers by 2020, with \$44 billion annual spending and influence of \$600 billion annual family spend.

When we focus on their media habits, it has been reported that the average Generation Z attention span is calculated at only 8 seconds. Gen Z uses five screens on average including smartphones, TV, laptops, desk tops and iPad/iPods. Also 79% of Generation Z displays symptoms of emotional distress when kept from their personal devices. Gen Z prefers social networks like SNAPCHAT, SECRETS and WHISPERS and 25% of 13-17 years olds left FACEBOOK in 2015.

In that regard, a Forrester Research

survey tells us that 22% of Generation Z consumers say that they trust (somewhat or completely) posts by companies or brands on social networks. Other research on brand marketing for Generation Z indicates that 64% of the group are more likely than other generations to trust (somewhat or completely) the content on mobile apps from brands, as well as text messages from brands. More than a third want brands to reach them on social media while only 13% seeking to be contacted by regular (snail) mail.

When we look at Generation Z as consumers, surveys tells us that the group would rather buy clothing online (55%) and 53% would do the same for electronics or books. More than 50% identify themselves as “deal hunters” and 57% research products before making a purchase. At the same time, Gen Z sees themselves as savers. The Intelligence Group research indicates that 57% would rather save money than spend it. While 76% spend money on themselves, 67% save it, 38% spend money on things for friends and family, and 10% give it to charity. Generation Z have financial goals which include purchasing a car (33%), paying for education (23%) and buying a house (20%).

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This group that has also been called CYBRIDS will comprise an important segment of our future audiences. Gen Z is into subverting traditional stereotype and pushing gender boundaries which may be an insight for potential content aim at this group. Finally, Forrester Research reports 84% of this group multi-task with an

internet connected device while watching television. Raised in the age of technology, Gen Z audiences know the world as a digital one - where they can connect anytime, anywhere and to anyone. We, as broadcasters, need to be prepared that this is likely the first generation to consume more media online than off line.

This item is excerpted and condensed from the INTERNATIONAL BUSINESS NEWS stating that the way the TV industry works seems antiquated, and nowhere is that more evident than the tradition of Premiere Week in late September when the broadcast networks debut new seasons of most of their new and returning shows.

It's a strategy that might seem dated in an on-demand age. No one can possibly watch all of these shows, and just naming them would stretch the mental capacity of even someone who works in the industry. The number of people watching TV during even this most hallowed of weeks is shrinking.

So why create intense competition? It turns out, there's a very good reason why Premiere Week is still a thing. There is a method to the seeming madness and, perhaps counterintuitively, our current on-demand world works in the networks' favor, allowing viewers to catch up on what they might have missed or heard about belatedly through word-of-mouth. Plus, there's still big advertising money in Premiere Week. Live viewership is down to skull-clutchingly low levels compared even to just a few years ago, but it's not gone. And, says CBS scheduler-in-chief Kelly Kahl, never doubt the power of tradition. People have been conditioned to expect this big bonanza.

That audience conditioning began in the early 1960s. ABC, looking for more ad dollars from automakers, created the concept of Premiere Week in the fall that would help boost car sales. The other networks followed suit. There had been some movement away from crunching everything into a single week in recent years for the broadcasters.

"You want to premiere your shows and give them a nice, long, uninterrupted run," Kahl says. "That was a little harder to do this year," with impending presidential debates and other election coverage. Tradition is a compelling argument, but it has nothing on money. While the industry is still undergoing a sea change, much of the money brought in by these shows is sold a few months before at the upfronts, and advertisers have their own goals they need TV advertising to meet."

"The audience is becoming used to seeing new shows year-round," Kelly Kahl acknowledges. "But the vast majority of people know fall means football, it means school's back; the leaves are changing, and all the new TV shows come on. Especially for the broadcast networks, that's something we have that others don't." As long as advertising is a major portion of our business, there will be an upfront — and as long as you have an upfront, you'll have fall premieres," Kahl says. "It's simply the rhythm of the TV business."

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With the competition from both cable and streaming services, broadcast television needs to provide year-round options. For generations, fall recalled all the things of autumn and equated to new shows on

the broadcast networks. Tradition has its place, but for the next generations of viewers, who watch when, where and how they want, Premiere Week could ultimately become an anachronism.



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CONTENT MATTERS
IDEAS IMPACTING THE CONTENT COMMUNITY

This item from *Broadcasting & Cable* has been excerpted and condensed from an article by University of Michigan professor Amanda Lotz. A lot of internet portals have attracted more attention than CBS All Access. But CBS All Access remains one of the most fascinating steps toward the future of television.

Portals are services that distribute television using the internet. Like channels and networks before them, portals select and organize television programs. Where a channel's task is to "schedule", portals curate. The launch of each new portal offers new lessons about the strategies of curation, which are quite different from scheduling. Channels build a schedule, portals build a library.

CBS All Access primarily has been promoted as a way to watch current CBS shows. But CBS All Access' most revealing clues about the future business of television have nothing to do with its current programming. CBS All Access illustrates the opportunity of a "studio portal." It exists to distribute content produced or owned by CBS Studios. Rather than licensing its library of content to a portal such as Netflix, CBS seeks to profit directly from its intellectual property.

Just as the industry has developed elaborate scheduling strategies over the decades, so too will strategies of curation

emerge. The business of curating a library is different than building a schedule. Schedules are all about time—when are programs "on." Because they aren't constrained to airing a single show at a time, portals don't face the capacity issue that makes scheduling so difficult. Their libraries allow viewers to find content when it suits them. One of the most effective ways to guarantee library consistency is for portals to own series—as in the studio portal strategy. Reliance on a subscriber-funded business model differentiates such portals from ad-supported, linear television as much as their internet distribution.

The real value of services that offer a library may not yet be clear in 2016. It has been just in the last few years that the U.S. industry has produced and aired more television than most people can watch. It may seem unlikely today for viewers to use portals to commonly watch shows a few years old, but as this era of abundance of programming continues, viewers not only slip from the timeliness of weekly viewing, but from current year viewing as well. The value of portals is providing a library for viewers to go back to that show everyone was talking about, but they never got around to watching.

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As professor Lotz concludes and we agree, channels and networks have decades of strategies built from the time-based norms of technologies only able to deliver a single program to a mass audience. While CBS

All Access is certain to gather a lot of attention when the new *Star Trek* series debuts next year, the bold new lessons it offers on portal library strategies will be even more interesting than its plot.

At a time when consumers -- and the ad industry -- appear to be blurring platform lines and lumping all forms of TV consumption together, new independent research indicates there still are fundamental differences in the way consumers experience TV programming and ads across platforms. The research was highlighted in an article excerpted and condensed from MEDIA POST TELEVISION NEWS DAILY.

Viewing on a conventional TV set continues to trump viewing on computers, smartphones and tablets in terms of ad attentiveness and recall, as well as their overall enjoyment of the programming and advertising consumer watch.

The study, which was commissioned by Nielsen-funded Council for Research Excellence, used independent researcher Hub Entertainment Research to measure how people watched the same five shows -- "Bones," "Family Guy," "The Big Bang Theory," "Survivor" and "Family Feud" -- including identical ad loads on TV, computers, smartphones and tablets. Based on a 15-minute post-viewing survey conducted online by nearly 2,000 respondents, Hub found that 62% of respondents were able to recall half or more of the advertisers, vs. only 47% for tablets, 46% for smartphones and 45% for computers.

The study had important goals when comparing viewing of TV shows and advertising across screens. They included the following questions. Do engagement

and recall differ across platforms? And what has the greatest impact on the viewing experience?

Using a 10-point scale to measure "attentiveness" of the ads viewed, 29% of respondents rated TV in the "8-10" range, vs. 23% for smartphones, 20% for computers and 17% for tablets.

The findings suggest that the experiential differences are due to two primary factors -- the size of the screen that consumers were watching, and the role multitasking plays when watching TV content on each platform.

"Multi-tasking negatively impacts engagement with ads (sponsor recall), but not with show (plot recall)," the study found. "Very little multi-tasking behavior (7-11%, depending on the platform) during ads was related to the brands featured in the ads themselves."

"The fact that viewers were equally engaged with program content, regardless of screen, suggests that there's nothing inherent in the device itself that makes them less likely to pay attention to ads," Hub Principal Peter Fondulas said in a statement, noting: "The more likely culprit for the lower ad engagement on smaller screens is an ad delivery approach that doesn't align well with the expectations, and viewing situations, of consumers watching on mobile devices." Just to reiterate, broadcasters should emphasize that 62% of respondents were able to recall half or more of the advertisers versus less than 50% for all other devices.

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The report went on to talk about the strength of television extending to other diagnostics of ad engagement. It was found that TV viewers are more likely to recall a higher percentage of advertisers

while also able to identify plot points within ads and identify brands within advertising. There is a lot of great news for traditional TV and consumer perception of the experience vs. other digital options today.



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“Yada Yada Yada”. “Not that there’s anything wrong with that”. “Soup Nazi, Double dipping, Master of your domain and Puffy shirt”. Even passing fans of the show ‘Seinfeld’ would recognize those phrases as quintessentially “Seinfeldian” as outlined in this article condensed and excerpted from the Atlanta Journal Constitution.

“Seinfeld” has been off the air 18 years yet still packs a punch in the pop culture world, fueled by daily repeats on broadcast television and TBS in addition to on-demand access on Hulu. And if you need a particular clip or meme to highlight a Facebook comment, they’re out there on the Web somewhere.

Author Jennifer Armstrong decided to write about this phenomenon in “Seinfeldia: How a Show About Nothing Changed Everything.” The show is as omnipresent as ever,” said Armstrong who watched “Seinfeld” with dedication during her college years when the show was at its peak form. “Nobody has done a book like this on it. ‘Seinfeld’ won’t die. It’s fascinating. If you were an alien and landed here, you’d think the show was still on in its prime.”

Armstrong said she had no expectation of finding any over-the-top new revelations given how much the media picked through the show’s origins and run in real time.

Some of her best new material came from the many writers who worked on “Seinfeld” over the years, most of whom had never been interviewed.

Indeed, for a show about four people who do reprehensible things, “Seinfeld” does bring millions of fans genuine happiness. Armstrong thinks that may be why so many folks hated the 1998 series finale, which featured the four sent to jail because they failed to help a carjacking victim. During the “trial,” their many misdeeds were recounted.

“My theory is it felt like a middle finger to America,” Armstrong said. “‘Hah! You’ve been watching these terrible people for nine years.’ It was a little bit dark and cynical for what America was anticipating as a celebratory, fun moment. Instead, they got this existential dark thing.”

Hulu is bringing in a new audience of binge-watching Millennials (and younger) to “Seinfeldia.” “My next-door neighbors are young. We get a lot of NYU students. When it comes on Hulu, I go into the hallway and hear the bass line from the theme song. They were binging the show for a week. Any time I walked out, I’d hear it. Then one time I heard silence. All of a sudden, I heard this voice: ‘So George marries Susan.’ Someone was explaining their relationship!”

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Armstrong writes in a breezy yet respectful style. As she said, “there’s a value in putting it all together in one place and telling a story. I don’t do just a list of trivia.” We agree with the

summation that at many points you feel like you are being escorted by a private tour guide through Seinfeld past, present and future. Like all classic television it could last forever.