

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. Broadcast viewers were thought to represent a more traditional TV audience than those watching cable.

A recent TiVO Research report says they are actually less likely to watch programming live than their cable counterparts, especially if the network in question is The CW. While for cable prime-time viewing during the 2nd quarter, 88% was viewed live, with total day viewing even higher at 91%.

2. Changing Digital Environment

New "Future of Digital Video" Study Reveals Marketers Find Social Platforms More Critical to the Success of Digital Video Campaigns than YouTube, Vevo and Others. This has the potential to significantly impact advertiser spending on broadcast and future digital platforms.

3. A Roadmap to Keep Audiences Laughing in this Evolving Content Environment

Comedy, as a TV genre, is a fickle beast: what is funny one second won't necessarily be funny the next. A panel of experts weighed in with tips on staying ahead of the comedic curve starting with talent and looking for diverse voices.

4. Do TV Shows Get a Boost From 'American' Titles?

"American Housewife" becomes the latest series to add to the title confusion. ABC's sitcom is entering a crowded space of hundreds of scripted series many with American in their titles. An analysis of this trend provides some insight.

5. What Is Television?

As lines blur further, it's hard to say what is TV? It's a funny question, given that five years ago it would have been incredibly obvious. TV was what showed up on your TV set, period.

Here are the TV shows and networks people watch live and least often. The report as excerpted and summarized by AD WEEK says broadcast viewers are more likely to time-shift than cable. That information comes from TiVo Research's Q2 State of TV report. The quarterly report tracks time-shifting using TiVo's Media TRAnalytics data set, which anonymously aggregates set-top box data from more than 2.3 million households including TiVo owners and other cable providers.

According to the study, while the vast majority of TV viewing continues to be live, broadcast network prime-time viewing is more likely to be time-shifted than cable programming. Twenty-six percent of broadcast prime-time programming was time-shifted during the second quarter (23 percent overall was watched in the C3 window, from the same day to three days later; the other 3 percent was time-shifted four to seven days). In total day viewing, 20 percent of broadcast programming was time-shifted.

The CW is the most time-shifted of the broadcast networks. Only 56 percent of its viewers watch live in prime time. Fox had 68 percent watching live, while the other networks were all in the 70s—CBS (71 percent), ABC (73 percent) and NBC (75 percent). In total day viewing, more than 80 percent of CBS', ABC's and NBC's content was viewed live.

The most time-shifted broadcast shows include all three of The CW's superhero series from last season: The

Flash (63 percent watched time-shifted), Arrow (58 percent) and DC's Legends of Tomorrow (55 percent). It was found that ABC's Modern Family (55 percent) and Fox's New Girl (53 percent) round out the top five.

Conversely, the broadcast shows that are watched live the most are NBC's Caught on Camera with Nick Cannon (89 percent), ABC's Jimmy Kimmel Live (88 percent), and NBC's Dateline: On Assignment (87 percent), ABC's America's Funniest Home Videos (86 percent), and the only scripted series in the group, NBC's The Carmichael Show (85 percent).

For cable prime-time viewing during the 2nd quarter, 88 % was viewed live, with total day viewing even higher at 91%. Meanwhile, the 10 highest-rated cable networks boast significantly higher live percentages. ESPN, not surprisingly, is viewed live 92 percent of the time, both in prime time and total day. In total day, seven of the top 10 networks are watched live at least 90 percent of the time (HGTV, CNN, ESPN, USA, TBS, Food Network and History; Fox News Channel, TNT and MSNBC hovered in the mid- to high 80s).

On cable, the most time-shifted shows were AMC's Better Call Saul (72 percent watched time-shifted), FX's The Americans (69 percent), USA's Royal Pains (62 percent), Comedy Central's Inside Amy Schumer (61 percent) and TBS' Full Frontal with Samantha Bee (59 percent).

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In reviewing these findings it seems to underscore that broadcast viewers have become accustomed to watching their favorite programs on their own schedules. As we plan for the future, no matter the

delivery system, as local broadcasters, we need to make our content easily available where and it would seem when our next generation of viewers want to watch the programming.



“The Future of Digital Video” study, commissioned by Advertiser Perceptions on behalf of Trusted Media Brands, excerpted and condensed here, asked more than 300 agency and client side marketers how and where they plan to spend their video advertising dollars in the coming months. The results from a new study exploring the future of digital video found 65 percent of surveyed marketers think social platforms (e.g. Facebook, Snapchat, Twitter) are the most important partners for digital video campaigns over video platforms (YouTube, Vevo); video demand side platforms or DSPs (Videology, Tremor Video); full episode players (Hulu, broadcast and cable digital properties); ad networks; publishers (BuzzFeed, Vice, Vox); and multichannel networks (Maker Studios, Awesomeness TV, FullScreen).

It found that YouTube will take a backseat to social as a preferred platform for digital video distribution. While video platforms are favored by 59 percent of all respondents, marketers rate social as by far the most important (65 percent). Live stream is on the radar and is likely to see increased advertiser investment. Eighty-nine percent of respondents are considering using live-stream video advertising in the next year (18 percent will definitely use live stream, and 71 percent responded they “might”).

Social platforms (e.g. Facebook Live) are ahead of video platforms (e.g. YouTube Live) among both agencies and marketers for live-stream video advertising. Forty percent of respondents believe Facebook should set the standard for the future of the video industry, indicating the Facebook in-stream auto-play topic is ripe for debate. “Facebook made a bold move with in-stream video. They followed that up with Facebook Live,” said Rich Sutton, chief revenue officer of Trusted Media Brands. “Hats off to Facebook – it looks like they will overtake YouTube as the video advertising platform of choice.” It has to be concerning that AD AGE has reported that Facebook is testing mid-rolls in live streams with some content providers.

Short-form video is most popular and use of micro video (5 seconds or less) is likely to grow. Forty-one percent of respondents plan to run short-form video content in the next year, with another 55 percent considering it. Overall, budgets for digital video advertising spending are rising. The survey found that 65% of agency respondents said that their budgets for online video ads will increase over the next 12 months, with 42% of advertisers saying so. Approximately one-quarter of overall ad budgets are currently allocated to online video.

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In what should be concerning to broadcasters is that programmatic is poised to take a larger share of online video advertising, with 51% of agency respondents and 32% of advertisers planning to increase over the next 12 months. It should be a red flag that full

episode players fall well behind both social and video platforms. All of these shifts especially to Facebook have the potential to begin an on-going erosion of the advertiser spend on broadcast television and our emerging digital platforms.



Comedy, as a TV genre, is a fickle beast. Most successful shows according to a panel at the NY Television Festival start with the talent as recounted in this excerpted and condensed item from PROMAX DAILY BRIEF. “You have to start with the talent first; it has to feel organic,” said Chris Linn, head of programming for truTV. “My least favorite question in a pitch is: ‘What are you guys looking for?’” said Sarah Babineau, SVP, Comedy Central. Talent agent C.C. Hirsch with CAA agreed, noting that crafting an idea around what you think a particular network wants never works.

The old-fashioned method of identifying stand-up acts with potential still works, the experts said, but so do newer, digital methods such as YouTube, Snapchat and Twitter. “For Comedy Central, standup was the development pipeline forever and it still very much is. But now we have another pipeline, which is digital,” said Babineau. Hirsch agreed. “Talent is everywhere and can be everywhere – just like content. It’s an amazing time for both. You can essentially be in anybody’s pocket at any time.” She added: “YouTube, blogs, podcast—these are great entry points.” So even if your talent and your content is funny, reaching and keeping an audience isn’t a given.

It’s all about “shareability.” “When we started to identify the new brand for truTV, we intentionally leaned into comedy

because comedy is one of the most shareable things,” said Linn. “We leaned heavily into social and digital promotion; we need the audience to evangelize for us. ...But more and more your research will tell you that 90 percent of people find content through word of mouth and more often than not, that’s through social.” So it’s important, when conceptualizing a show, to think about it in terms of “shareability,” said C.C. Hirsch. How does this show break down into shareable bits? How can this travel?

Another challenge for creating good comedy is how to accurately reflect and connect with an audience who is often much more diverse than the comedy industry has a reputation for being. “We need to make sure we have diverse teams of people working for us who get the references that maybe not everyone in the room gets—that have been a problem in the past,” Linn said. But Linn added that it’s important not to underestimate what an audience may find relatable, no matter their color or background. “As the world evolves and as we have greater connections to one another, I think we’re all learning to appreciate different styles of humor,” Linn said, noting audiences are hungry for new things and there’s a lot of appetite out there for something different.

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What can we learn from the insights of this experienced panel? It is like the old adage: “Dying is easy, comedy is hard”. That is why even the comedy focused cable channels are facing a difficult road to success.

It is no wonder that in the current environment, the limited offerings and lack of options on the broadcast networks and thus later in syndication are becoming less and less successful.

In addition to attempting to cut through a crowded landscape of more than 400 scripted originals, American Housewife, about a strong-willed mother raising her flawed family in a wealthy town filled with "perfect" wives and their "perfect" offspring becomes the latest series with the term "American" in its title. The analysis of this trend is excerpted and summarized in this article from the HOLLYWOOD REPORTER.

While FX tweaked its title from American Crime Story: People v. O.J. Simpson to lead with the latter in an attempt to differentiate itself from ABC's anthology American Crime, the patriotic title can also be found in series as different as FX's American Horror Story and NBC reality competition entry American Ninja Warrior. With so much title confusion, how much does "American" actually help a show cut through the clutter?"

The comedy, loosely inspired by the life of showrunner Sarah Dunn, went through pilot season as The Second Fattest Housewife in Westport, with the title ultimately tweaked to the blander American Housewife in a bid to dodge outcry from potentially offended viewers. "What we were trying to find for that show was something that would make the show feel more universal," ABC Entertainment Group President Channing Dungey says. "We debated a lot of things and American Housewife felt like it was the most universal. But I do feel we are reaching a threshold of shows called American something."

Indeed. The crowded American marketplace also includes NBC's America's Got Talent, VH1's America's Next Top Model and ABC's America's Funniest Home Videos. There's also TBS' American Dad and FX's The Americans. Then there's also former shows including American Idol, American Dreams and the iconic American Bandstand.

"In this form of scripted television, the word "American" allows writers to tackle social issues specifically relevant to the U.S., while still focusing on specific unique characters," says Linda Ong, CEO and founder of branding company TruthCo. "America codes for a multiplicity of perspectives and outlooks, which is why the word is so common in anthology series, yet also points to a larger collective experience, which is why the word accompanies so many shows that explore race and gender."

Ong and her team of analysts say there are key reasons "American" seems to be used in titles. First, to represent traditional (or conservative) values of prosperity, upward mobility and competitiveness, with reality shows often using the title to distinguish itself from a global format. Second, American is meant to take an ironic outlook at what was once a proud identifier — like American Housewife. And also the title was to unflinchingly investigate America's sins (say American Crime Story, The Americans).

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This was an interesting trend to observe. As Linda Ong noted and we agree, that "as the landscape becomes more saturated with titles bearing the word American, it might soon be smart to start

avoiding the word to differentiate from other material." So we may be at the end of the American title trend, but we will always have our nostalgic memories of American Bandstand.

What Is Television? Is the question posed by TV analyst Alan Wolk in this item excerpted and summarized from TVREV. This is more than a rhetorical question, as anyone who has ever done any research into market sizing “online video” can tell you. Some estimates place any sort of video that’s delivered digitally into the “online video” category, including network content that’s carried on their dedicated sites, while others use a much narrower definition—YouTube and digital publishing sites, and everything in between.

Only today, it’s not so obvious. The Netflix/Comcast deal put that into sharp relief. Is Netflix, delivered on a set top box, now TV or is it still “online video”? That makes it difficult to get a clear understanding of the degree to which viewer behavior is changing and the amount of traffic “online video” is getting. To that end, TVREV proposes a way to tell TV from online video.

TV is professionally produced content that lives on an app or website or TV network whose sole purpose is to show video content. That content can be long-form (20 minutes or longer) or mid-form (10 minutes or longer), but must be part of some sort of series, exceptions granted for movies and actual specials. Online video is professionally produced content that lives on a site or app whose

main purpose is not to show video content and which is not part of any sort of a series. All UGC (user generated content) is online video. Only then we ran into a whole lot of gray area. For instance, YouTube is not generally considered television, yet there are professionally produced network series on YouTube, some of which are there legally, some of which are not. And of course, YouTube’s sole purpose is to show video, and while it’s not BuzzFeed, it’s not exactly NBC either.

Then there’s that middle ground in terms of production value. Web series that are shot by people who have some experience with a camera, but at a quality level that makes us hesitant to use the term “professionally produced.” Point being, it’s really, really hard to issue a standard definition of “what is television” without resorting to the old Supreme Court definition of pornography which was “we’ll know it when we see it.” That’s as good an indication as any that lines are blurring, that the range of content that starts with a 12-year-old in her bedroom ranting at her iPhone camera on YouNow and ends at “Game of Thrones” and its multimillion dollar budgets is becoming a giant continuum, with no hard and fast lines.

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Blurring of the lines is good thing for Wolk and he think those lines will shift even further, giving viewers a much wider range of options and making it more difficult to characterize. We believe that we should not let that

happen. TV should be defined as premium content and we need to make that assertion clear to viewers, otherwise as part of that confusion, the value of our professionally produced content will be compromised.