

New Best Practices 2016

lee hunt LLC

New Best Practices 2016

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For the last two or three years in this session, we've talked about the disruptive changes facing our business: the relevance of channel brands in an on-demand world, competitive cross channel promotion, OTT cannibalization, the rise of Netflix marketing, TVE vs. SVOD. Today we're going to continue those conversations.

And thinking about all of it reminded me of something one of my producers used to say when she'd walk in to the office to face a bunch of problems. And it occurred to me that maybe we should change the name of this session accordingly.

From New Best Practices...

What Fresh Hell is This? 2016

2

...to What Fresh Hell is This?

OK. I want to warn you I have a lot of charts and graphs this year, with a lot of detail. And I'll be going through it pretty quickly. But don't worry if you miss any of it. The entire presentation—charts, graphs, videos—it's all sitting on my website, just waiting to be downloaded.

Let's start with some numbers. The technology of viewing continues to change. We all know that. But here's a new one.

65% of TV households have a connected TV

3

65% of TV households now have a TV connected to the Internet.

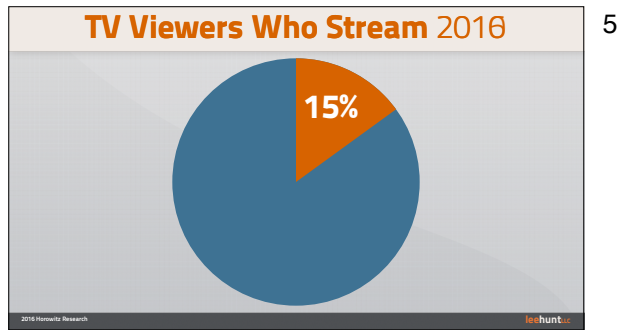
There are more connected TVs
than set top boxes

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In fact, today there are more connected TV devices than set top boxes.

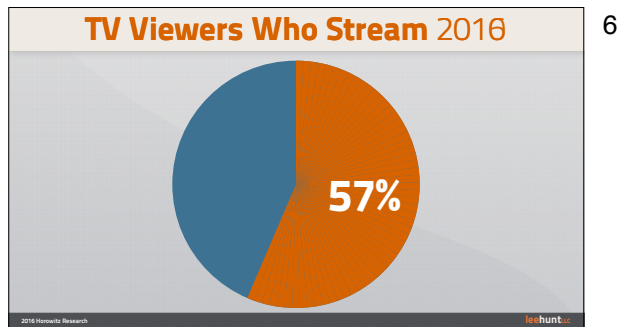
That means more televisions can access Internet-delivered content than cable, satellite, or Telco-delivered content.

So are people using these connected TVs?



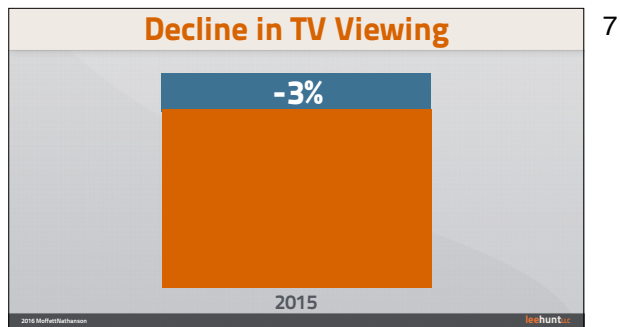
5

In 2010, 15% of TV viewers streamed at least some of their TV content.



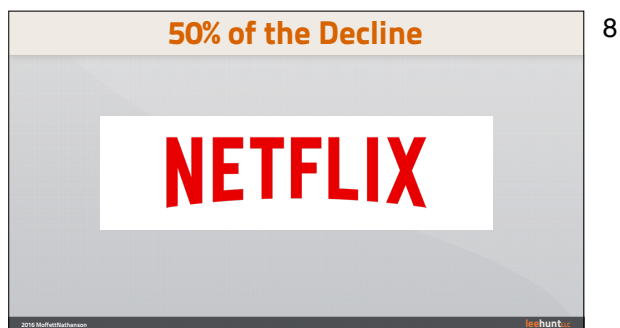
6

Today more than half of all TV viewers are now streaming content—57%.
How does that affect linear viewing?



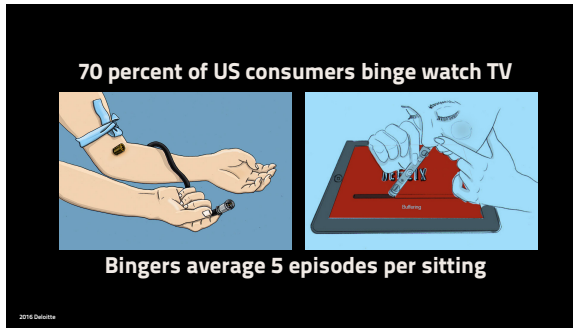
7

Between 2014 and 2015, we saw a 3% decline in linear television viewing.



8

Of that 3%, half was attributed to Netflix.
Think about that. 50% of the decline in US TV viewing can be traced back to a single service, Netflix.
And as you know, Netflix changed the way we watch television.

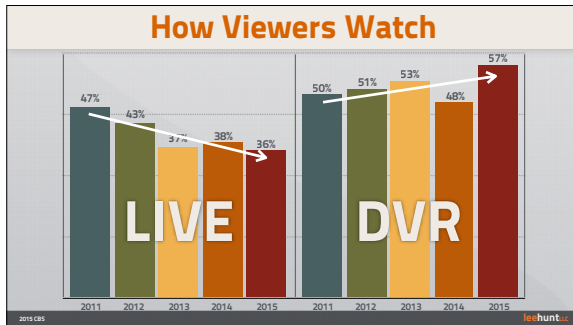


9

According Deloitte, 70 percent of US consumers now binge watch TV, averaging 5 episodes per sitting.

Now hang on a second, with the exception of back-to-back episodes or marathons, that's not how linear TV works.

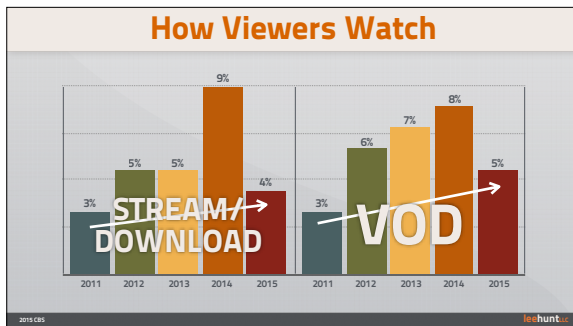
But it's not just happening on Netflix and other streaming services.



10

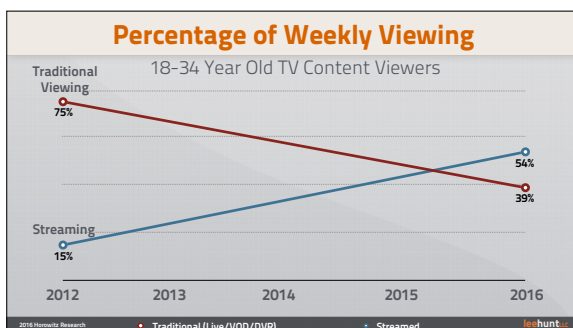
According to CBS' David Poltrack, viewers are more likely to watch a new series time-shifted than live and that trend is growing.

Why do people DVR shows? To collect multiple episodes and binge watch, and to skip breaks. Both powerful incentives.



11

Now his numbers for streaming, downloading and VOD aren't nearly as significant, and as you can see, there seems to be an aberration in 2015, but nevertheless, the trend is obvious.



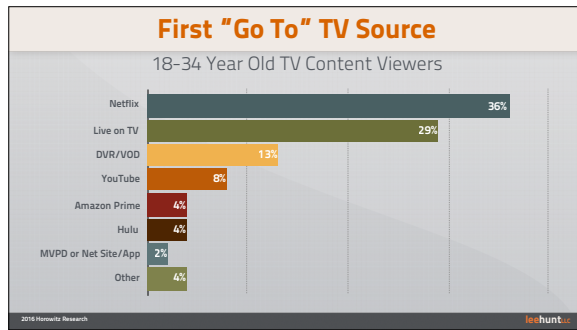
12

But let's break it down to Millennials—that audience we all seem to be chasing after these days.

According to Horowitz Research, since 2012, the weekly share of traditional viewing among millennials has dropped from 75% to 39%.

The share of viewing that is streamed, though, has risen from 15% to 54%.

Streaming is the new normal for Millennials.

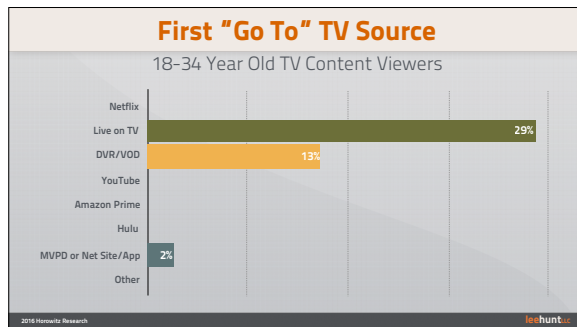


13

And what do they stream?

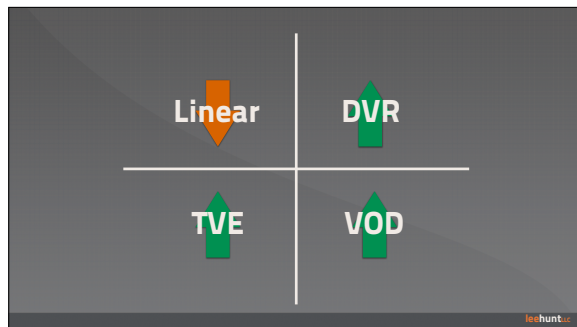
Netflix is the "go-to" source for TV content, followed by live, DVR, VOD, YouTube, Amazon Prime, Hulu, MVPD or Network Apps—which would be TVE, and Other.

My guess is that "Other" is illegal streaming services.



14

So what do we control in this equation? About 44%.
Less than half.

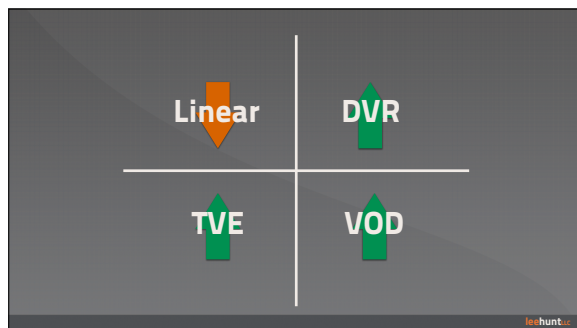


15

Let's think of it this way: here are the platforms that most of us use to compete against each other and streaming services like Netflix.

Of course, HBO, Showtime, Starz, CBS and Lifetime's Movie Club have their own SVOD services, but let's put those aside for a moment.

Here's what we have to work with: linear, which is falling off. DVR, which is growing, TVE—TV Everywhere, which is authenticated desktop players that you access through apps like FX Now or Watch ABC; and VOD—programming from our networks that is available on-demand on set top boxes. Both of those continue to grow.



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So let me ask you this—how many of your marketing plans, particularly your on-air marketing, is based on DVR behavior? TVE behavior? Set top box VOD behavior? Do you even understand that behavior?

Because you're very good at getting them there.



17

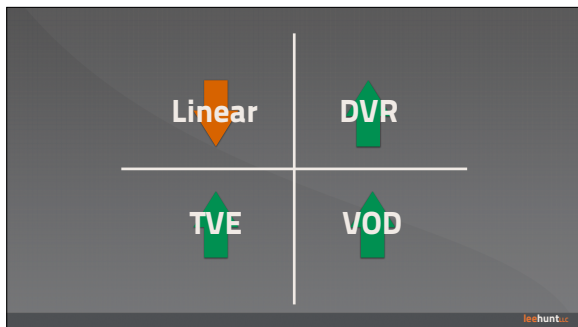
(1:24 Cross Platforms montage)

So we do a good job of using our linear air to send viewers to our other platforms. But let's not forget we're also very good at sending our viewers to competing platforms.



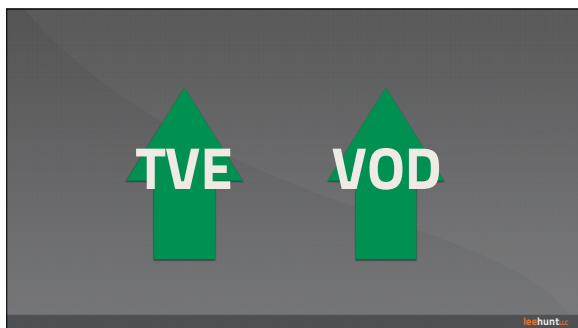
18

(:16 Competing Platforms montage)



19

But, let's go back to our own platforms. Do we know what happens when they get there?



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That's a question NBCU asked this last year. They wanted to better understand what the viewer experience was like for both TV Everywhere and Video on Demand. They recognized that their viewers were shifting platforms, and they realized that if they want to compete with Netflix or other streaming services they had better understand the viewer experience on their streaming platforms. So we worked with them to find out.

They've been kind enough to allow me to share the results of that study. However, we won't be sharing the recommendations or the solutions. You'll have to figure that out for yourself.

STB & TVE Audit

leshunte

For this study we audited nine series available on-demand from AMC, BBC America, Bravo, E!, FX, NBC, Syfy, TNT, and USA using the Comcast and Time Warner Cable set top boxes, and individual network desktop players.

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One Hour Linear Program Clock

The diagram illustrates the structure of a one-hour linear program. It consists of a horizontal bar divided into segments. The segments are: a small blue segment, followed by a green segment labeled 'Break 1', a blue segment, a green segment labeled 'Break 2', a blue segment, a green segment labeled 'Break 3', a blue segment, a green segment labeled 'Break 4', a blue segment, a green segment labeled 'Break 5', and a final blue segment. The blue segments represent content, and the green segments represent commercials.

Content Commercial Packaging

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One Hour On-Demand Program Clock

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One Hour Linear Program Clock

Social Program Promos

Chicago 101 Centennial 50 Social SE Social Prime Centennial 50 Social SE Centennial 50 Texas SE Social Program Promo Square Prime at 10 Social Program Promo

New SE Social Prime Social Contract SE Integrated Brand Program Prime Program Prime

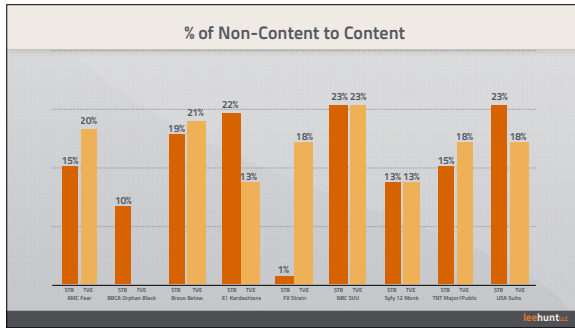
Centennial Centennial Prime Chicago 101 Social Prime

iNewsHunt

In the linear world, we've learned to optimize breaks to increase viewership for both our commercials and promos; we use specific strategies to keep viewers watching for longer periods of time and coming back more often. And we know our promos are the most effective and efficient marketing tools we have.

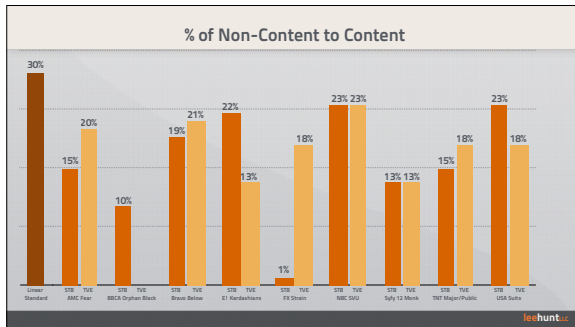
We've talked a lot about that in these sessions over the years.

New Best Practices 2016 - June 15, 2016



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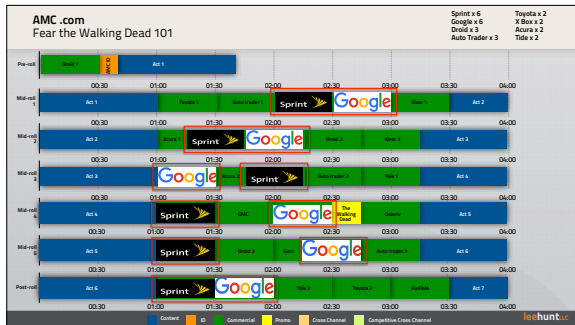
First the good news. We found the percentage of program content to non-content (commercials and promos) to be lower in both the set top box and TVE environment than in the standard linear experience.



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For example, the linear percentage of non-content is usually around 30%.

While this suggests that on-demand offers a better viewing experience, a closer examination of the breaks reveals something quite different.

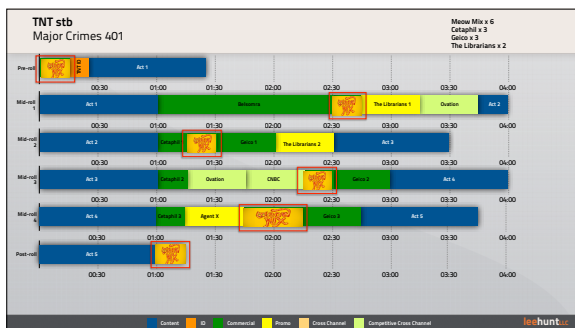


27

We found across all networks and platforms a serious problem with repetitive spots.

In one episode of AMC's Fear the Walking Dead viewers were exposed to the same Sprint and Google commercial 6 times. That's just in one episode. If the viewer watched more than one episode back to back, which we know is typical for on-demand viewing, the number of repetitions would continue to grow.

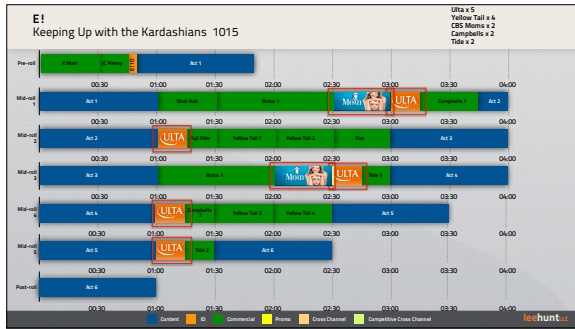
And during the entire hour there was only one 15 second promo. AMC that month scheduled an average of 3:38 of promos an hour in their linear feed.



28

On TNT, viewers saw the same Meow Mix commercial repeated 6 times.

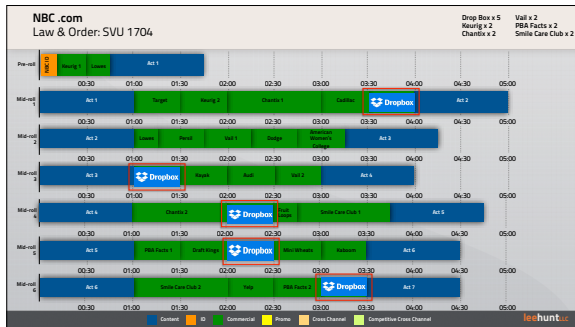
Also note that there was as much competitive cross channel promotion on TNT, the light green bars, as on-air promotion, the yellow bars.



29

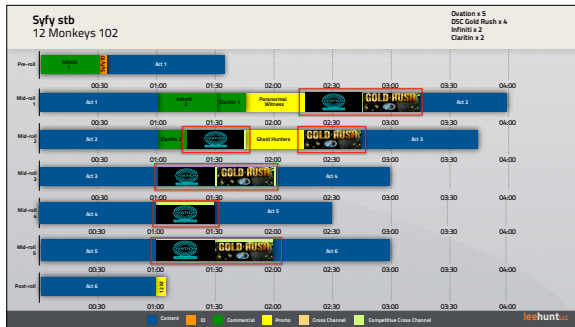
On E! we saw the same Ulta spot five times.

And the only promos were competitive—for the launch of the new season of CBS' Moms. No promos for E! shows.



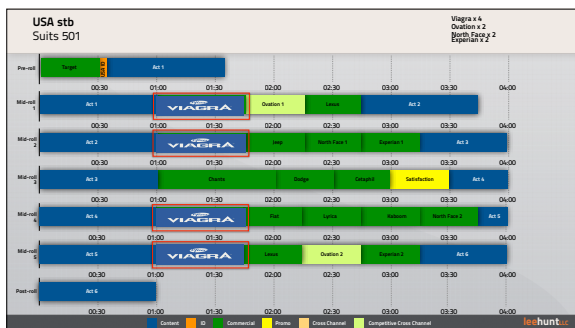
30

On NBC, there were no promos at all, but there were five plays for Drop Box.



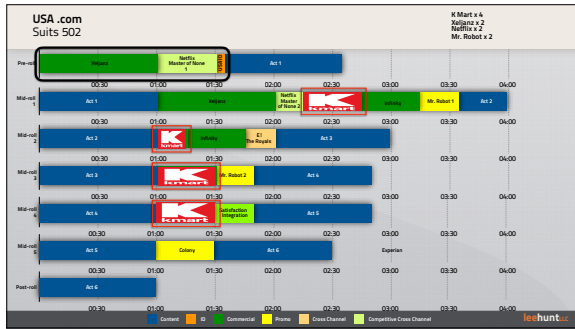
31

On Syfy, there was more competitive cross channel promotion than on-air promotion, or even commercials for that matter.



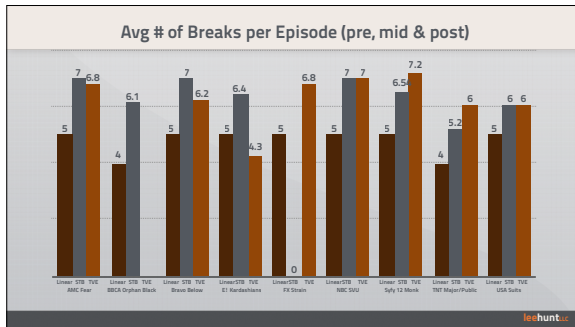
32

In this USA Suits episode viewed via set top box, the same :45 Viagra spot aired in the A position in four out of the five internal breaks.



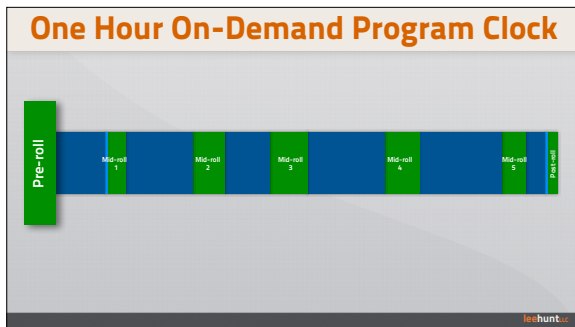
33

And in this episode viewed on the USA player, viewers saw the same K Mart spot 4 times. And note the 1:30 pre-roll. We'll come back to that in a minute.



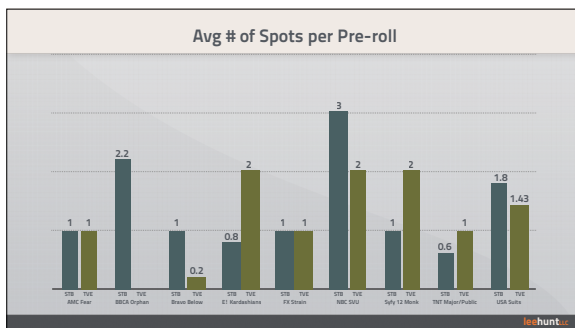
34

So while the percentage of non-content to content in on-demand viewing was lower, the number of interruptions and quality of those interruptions is concerning—across all networks.



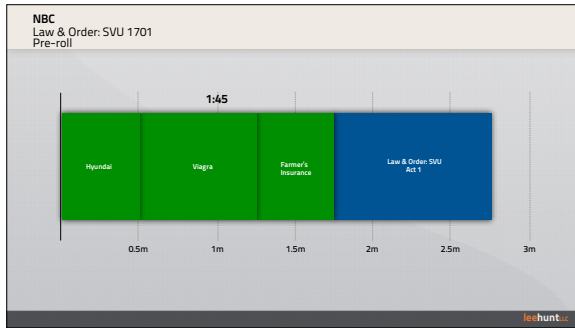
35

Let's return to pre-rolls. Pre-rolls are important because they are the first messages we deliver to on-demand viewers. Unlike internal breaks, where we've engaged the viewer with content and given them a reason to stay through the break, pre-rolls count on viewer anticipation to sustain intent to view.



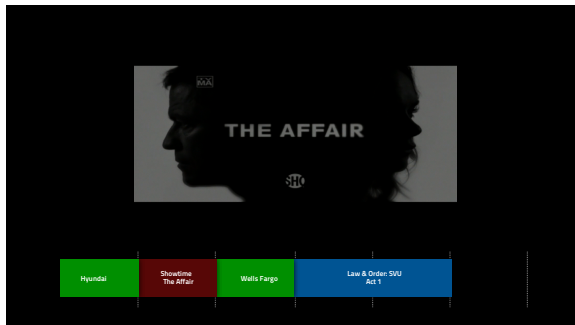
36

The majority of episodes we sampled contained some pre-roll commercials.



37

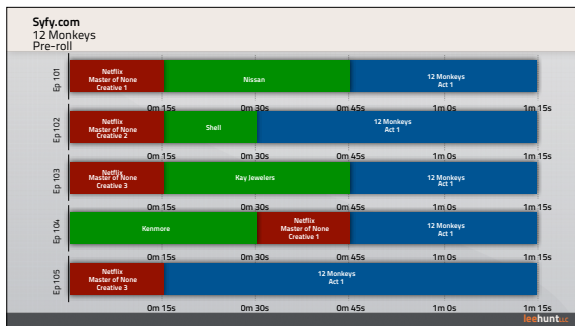
Of all the networks we sampled, only one had 3 pre-roll elements in their set top box presentation. The longest we recorded was 1:45—which is a long time to wait for your show to begin.



38

We also recorded this 3-element pre-roll that included a competitive cross channel promo for Showtime's The Affair.

Competitive cross channel promos in the pre-roll are problematic.



39

For example, in the first five episodes of 12 Monkeys, Netflix aired 3 different pieces of pre-roll creative for the launch of their new series, Master of None.

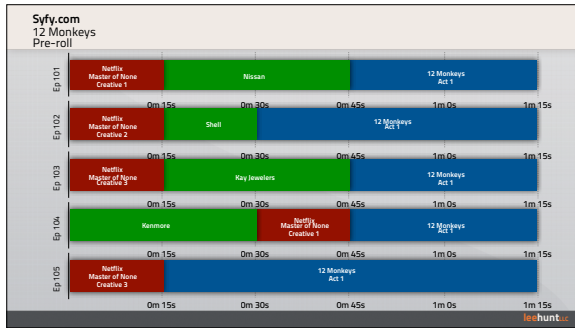
So if I am binge-watching 12 Monkeys, Netflix has five opportunities to sell me with three rotating creatives.

Very smart for Netflix. Not so good for Syfy.



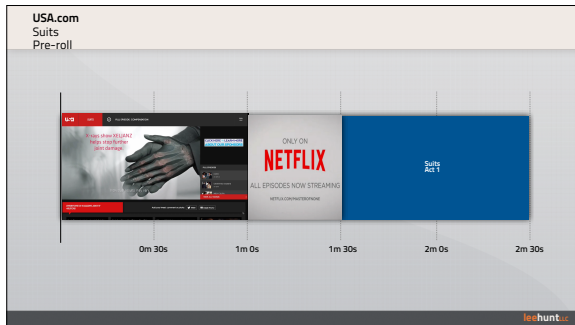
40

Here's what the three spots looked like.
(:60 Syfy pre-roll montage)



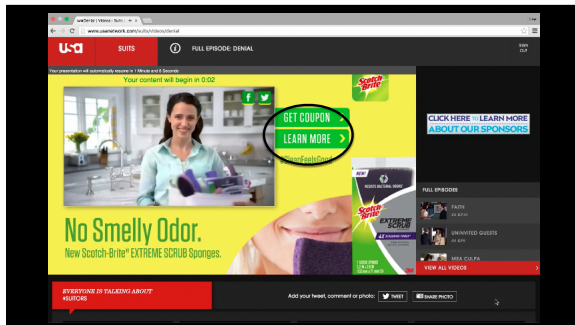
41

To put this in perspective, this is the same as allowing AMC to run a Walking Dead promo on Syfy's linear feed at the 9pm start of 12 Monkeys that essentially says, "Hey our show is starting right now, too; why don't you change the channel and watch us!"



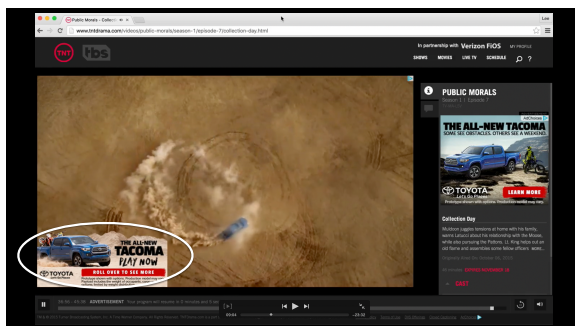
42

And here's another roadblock. First, bore viewers with a 60 second pharmaceutical ad, then let Netflix convince them to switch platforms.



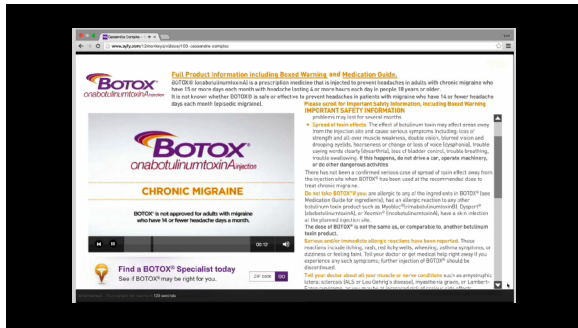
43

We also need to be on the look-out for interactive spots—commercials that purposely lead viewers away from our content site before the content has begun. "Get a coupon." "Learn more."



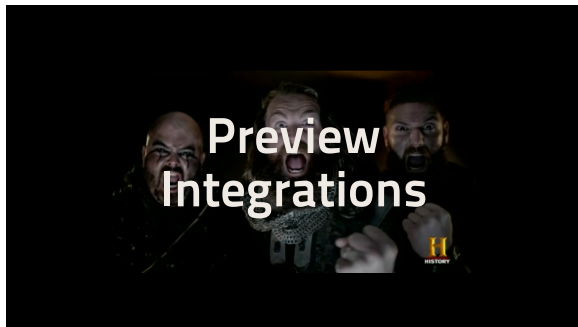
44

Or, "click here to play a game." If we're going to have interactive spots, they should be relegated to internal breaks. Hopefully, by that point our content has engaged viewers enough that if they leave during the break, they have an incentive to return.



45

Also, certain kinds of commercial content should just be excluded from pre-rolls.



46

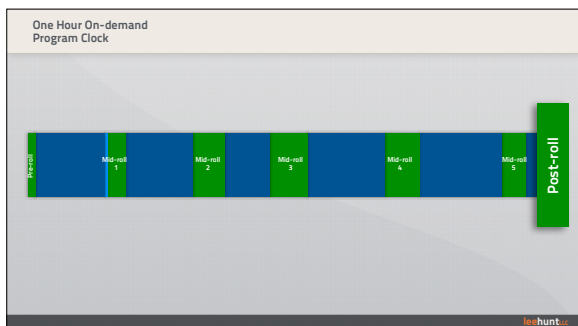
We saw no promos in any pre-rolls. That's a mistake. We believe there is an opportunity to create integrated "previews"—essentially the brand integrations we currently use in linear television—integrations that are entertaining, promote programming, and give advertisers a unique creative voice; like this.



47

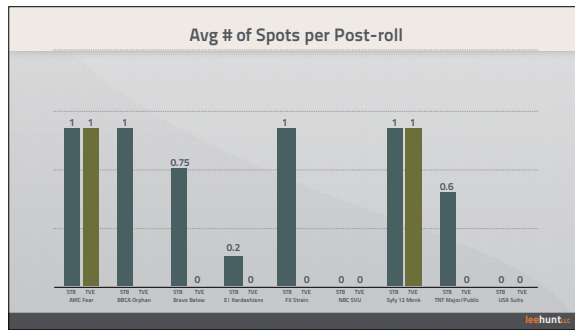
(:30 HIS Vikings Integration)

It's important to remember that when movie theaters began allowing commercials before feature presentations, they did not abandon previews. They recognized that monetizing viewership without reinvesting in that viewership was not a smart strategy.



48

Let's jump ahead to the post-roll.



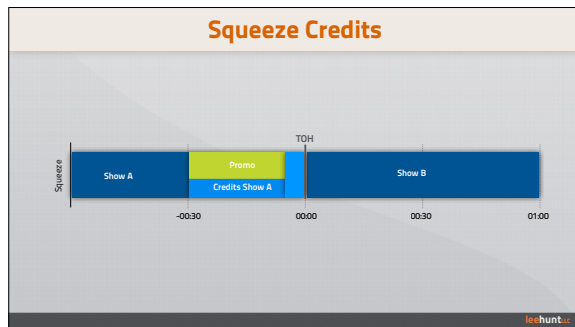
49

In our audit, we only saw a few post-roll commercials.

Most of the post-rolls we found were "next time on" promos.

This is understandable since we know that most viewers leave when the credits begin.

That's why back in the late 90s we began to use accelerated flow tactics to reduce viewer erosion during credits beds.



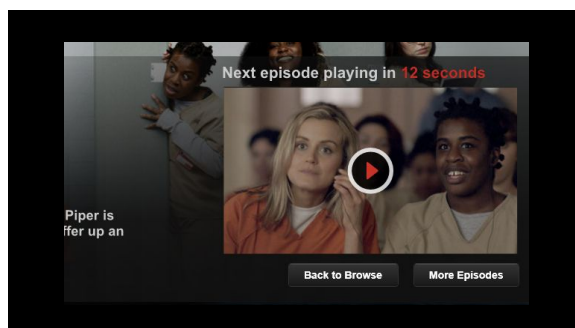
50

NBC created the first squeezed credits, and revolutionized how we transition from one show to another in the linear world.



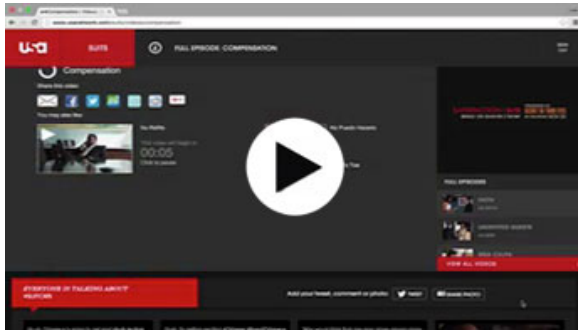
51

But Turner introduced woven credits—the first linear "binge" tactic: pushing the credits of Show A into the open of Show B to create a near seamless transition between back-to-back episodes.



52

Netflix introduced the digital version of woven credits with "post-play" in 2012. They have continually updated and upgraded the experience.



53

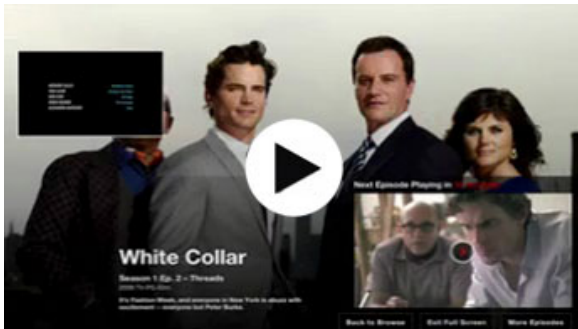
Most networks have an autoplay feature in their TVE platform.

(1:08 Suits Auto-play transition)

Excuse the sync. That's on my end, not USA's.

In this case we sit through the entire 30 second credit bed, before being delivered to the not particularly well-designed auto-play page, that triggers—after some buffering latency—a 5 second countdown.

And we're into... a 45 second Viagra commercial. Not exactly seamless or binge-

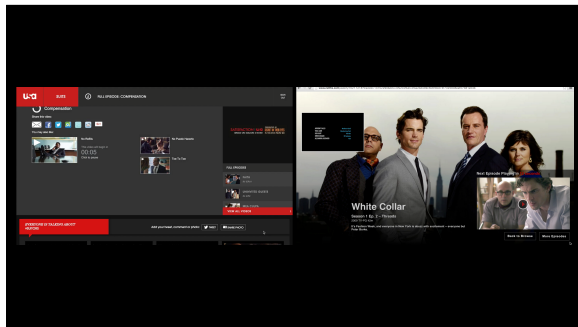


54

Here's how Netflix treats a USA show with their "post-play."

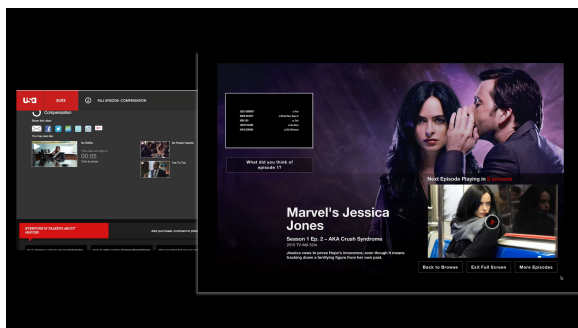
(:32 USA White Collar Netflix post-play transition)

It's not perfect, but we only sit through 15 seconds of credits—less than half—before the next episode begins. And, obviously, there are no commercials. And it's all happening in a USA show-branded environment.



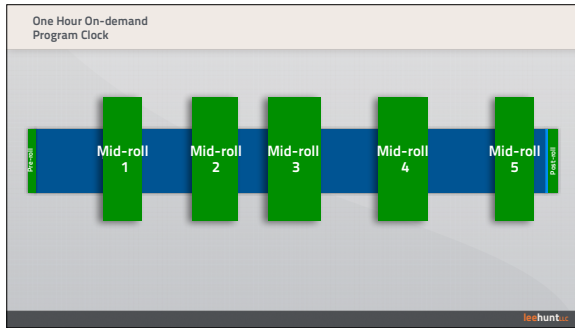
55

While neither is ideal, Netflix's treatment of USA content is better branded and creates a more inviting binge experience.



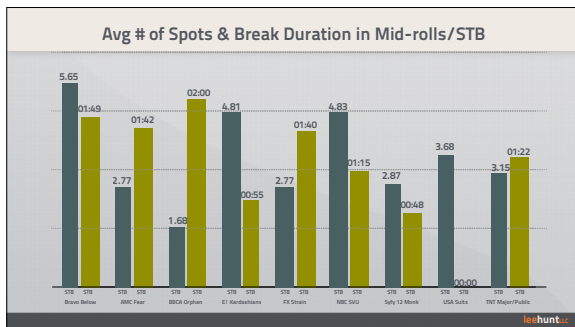
56

And the post-play transitions for Netflix originals are even more inviting.



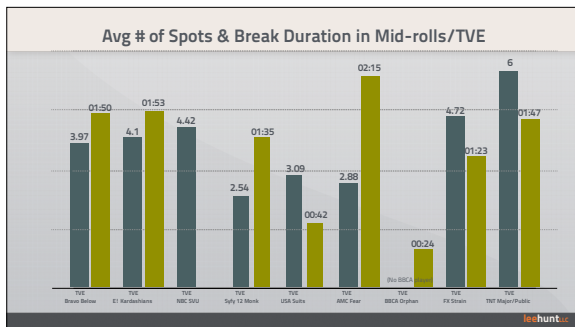
57

Earlier we saw the problem of repetitive spots in the mid-rolls.



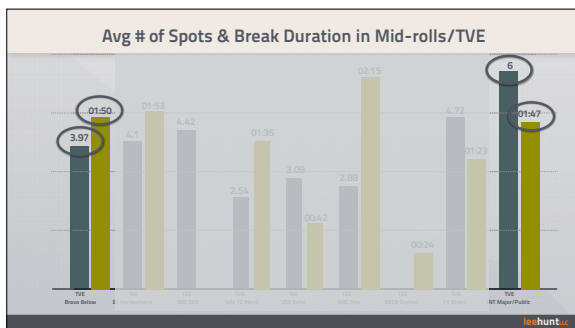
58

While the average number of spots and average duration per break was lower than linear on both the set top box...



59

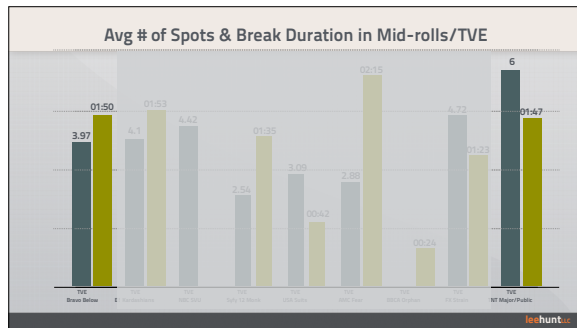
...and TVE, it's important to note that the relationship between the number of elements and length of spots can create a cluttered, erosion inducing break.



60

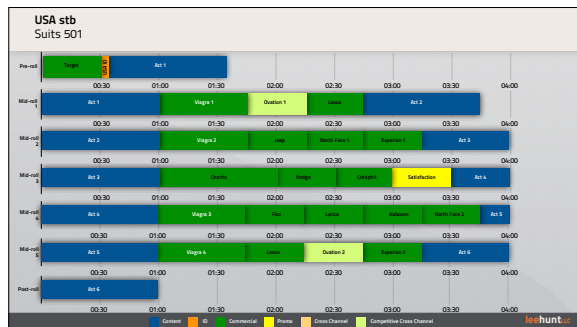
For example, Bravo and TNT had close to the same average TVE break length, 1:50 for Bravo, 1:47 for TNT.

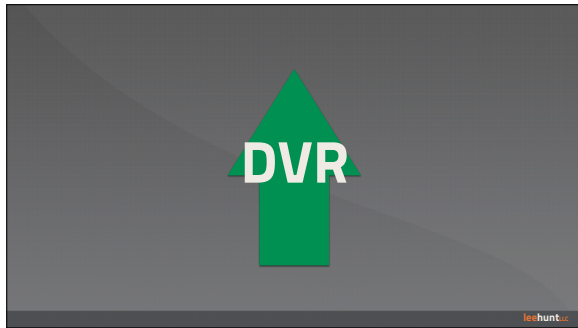
But Bravo had 30% less spots. TNT scheduled a significant number of 15 second commercials in their breaks. That may increase the overall number of impressions, but we know from the linear side it can also trigger erosion.



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It all goes back to accelerated flow. If you play 4 thirty-second spots for people and ask them to guess how much time has elapsed, most will correctly answer "2 minutes." But if you play 8 fifteen-second spots, the perceived elapsed time increases, making the break feel longer than it really is.

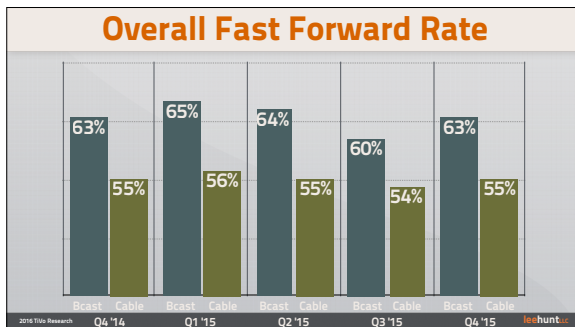




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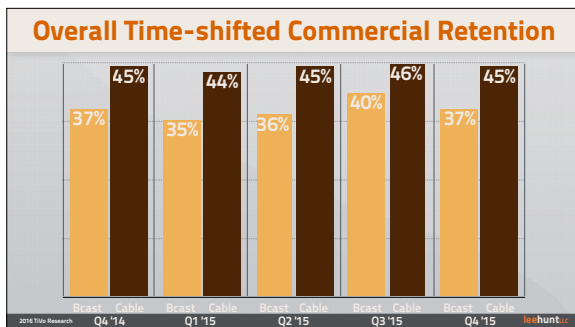
A few months ago I was talking with a Comcast executive who told me they've found that many viewers use VOD and TVE to sample new shows, but if they like those new shows they start recording them on their DVRs.

That makes sense. Most VOD and TVE content is fast-forward disabled. Obviously, DVRs are not. You can binge watch over time and fast forward through commercial breaks.



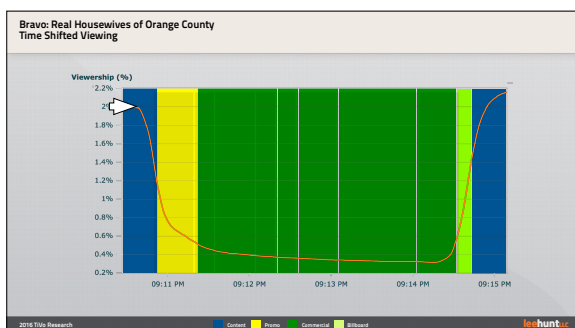
66

According to TiVo Research, between the fourth quarter of 2014 and 2015, an average of 63% of broadcast primetime shows experienced some form of fast-forwarding. Cable didn't fair much better with an average of 55%.



67

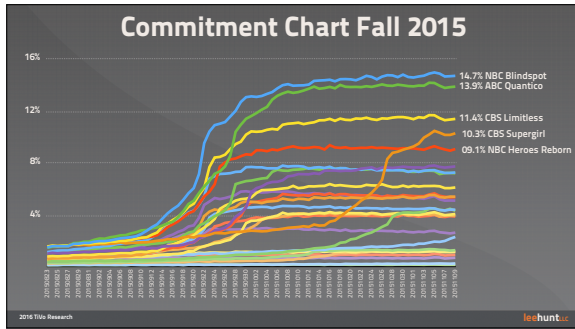
And commercial retention, the percentage of primetime time-shifters who sat through commercial breaks in real time averaged 37% for broadcasters and 45% for cablers.



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The behavior tends to look like this: viewers get to a commercial break, they fast forward until they see content, hit play, there is a slight rollback, and they are back into real-time content.

So we're definitely at a disadvantage when people watch our shows on their DVRs. But there is also an opportunity.

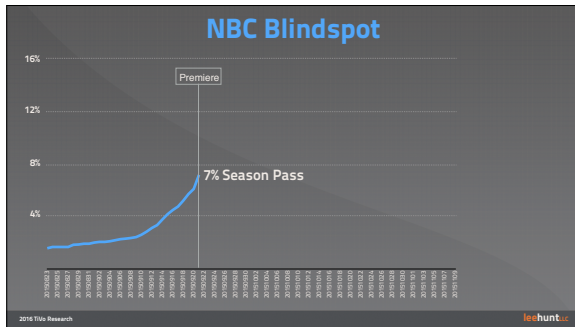


69

This fall, TiVo Research looked at how many households set season passes for certain shows—how many people decided to record an entire season of a new series, not just one or two episodes.

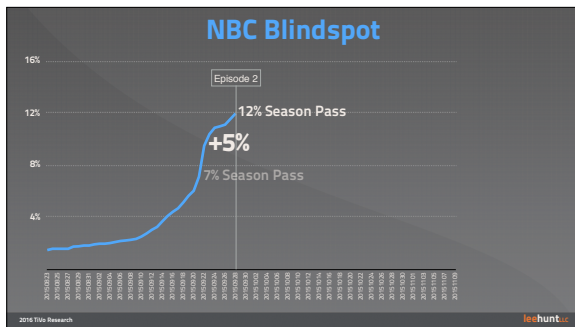
Here are the top five broadcast recordings. At the top of the list is NBC's *Blindspot*. Nearly 15% of all households with TiVo DVRs set up a season pass to record every episode of *Blindspot*.

Impressive. But let's break that down.



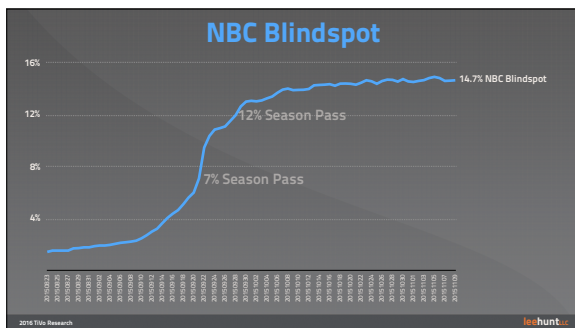
70

Leading up to the premiere date, 7% of all TiVo households set up a season pass. That says a lot about the strength of NBC marketing and promotion. But look at what happens between the premiere date and the second episode a week later...



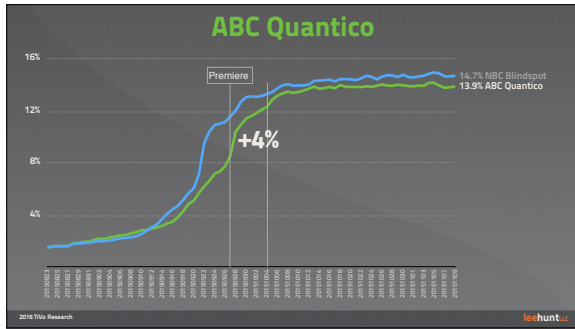
71

In 7 days, the number of season passes jumps 5 percentage points.



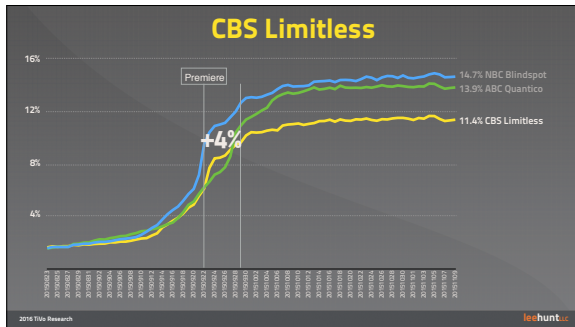
72

It then continues a slow steady climb to 14.7%.



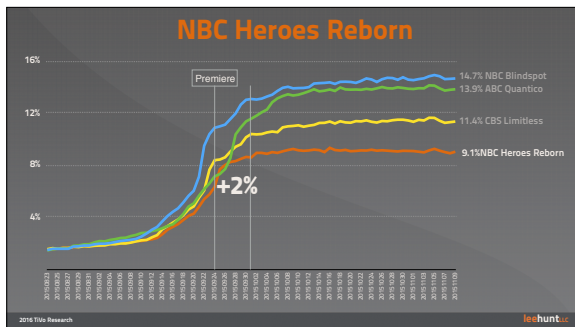
73

ABC's Quantico has a similar jump between week 1 and 2 with a 4% growth.



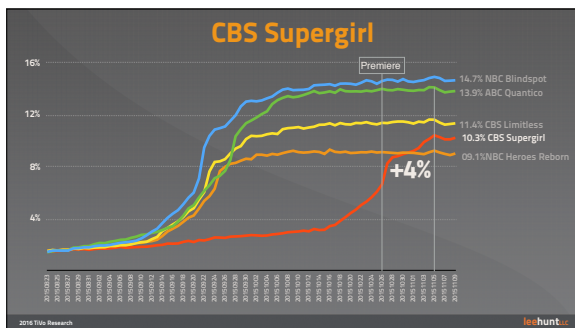
74

The same with CBS' Limitless.



75

NBC's Heroes Reborn has a smaller jump, only 2%, and as we know, it didn't survive.

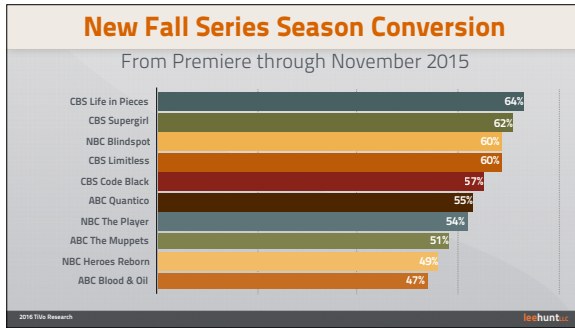


76

And Supergirl, who's premiere was nearly a month later, needed about a week and a half to hit it's stride of 4%.

What's the point? In the DVR world while the lead-up to the premiere is obviously important, it's the week after the premiere where we can have a significant impact on the number of people who make an entire season's commitment to a show.

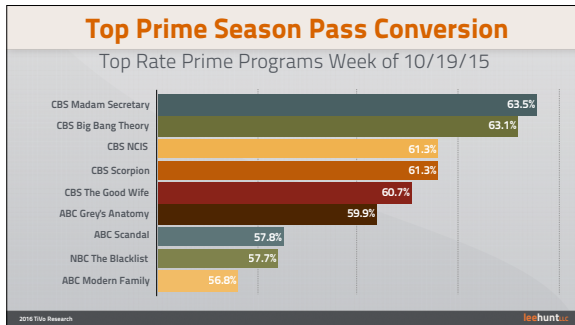
But do they stick with that commitment?



77

Based on TiVo's numbers, the majority do. CBS' Life in Pieces had the highest conversion rate. 64% of households that recorded a season pass watched every episode through November.

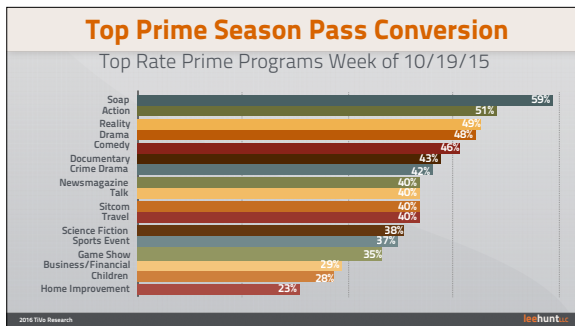
You'll also notice that all the shows with a conversion of less than 55% didn't even make it through the season.



78

And its not just new series. Even shows deep into multiple seasons often have high conversion rates.

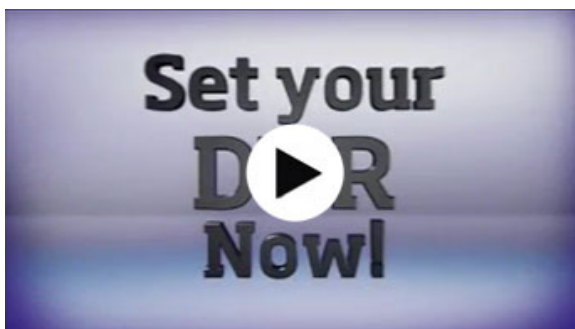
But of course not all shows are converted equally.



79

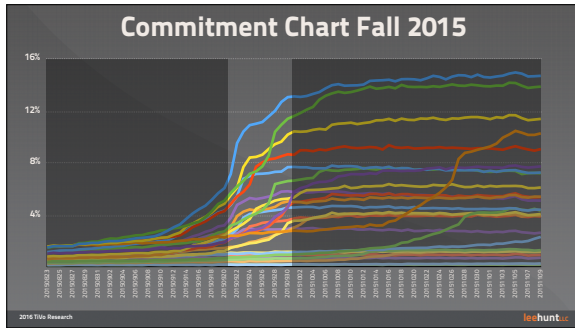
Some categories of programming, not surprisingly, command greater commitment.

My point is that as DVR viewership continues to grow, we need to better manage that viewership. Right now we primarily use it for catch-up marathons or to get viewers to record single episodes.



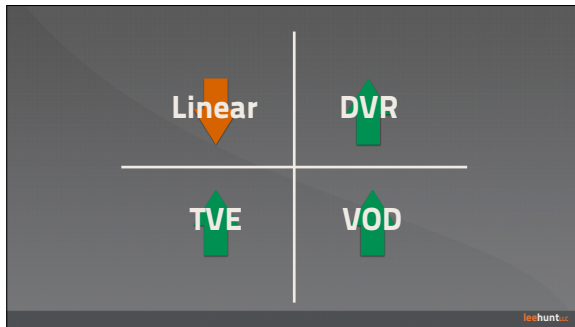
80

(:30 DVR montage)



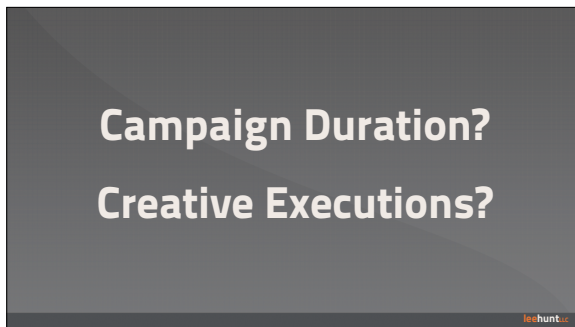
81

Maybe it's time we rethink the opportunity with DVR promos, use them stimulate seasonal commitment to a show, and focus placement in that week after a show's premiere.



82

What do we have left? Linear.

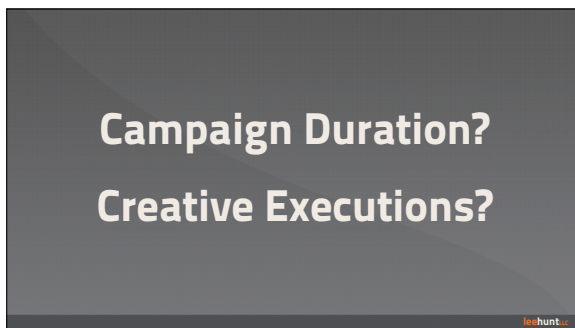


83

Two questions I often hear on the linear side are, "how long should a campaign run?" and "how many creative executions should we make?" Technically the answers are statistical.

A campaign should run long enough to hit effective reach and frequency for your targeted audience—usually not your core audience, but your "occasionals"—viewers who don't come to the channel often, but when they do tend to stay for a while, and those who visit the channel fairly often, but don't stay for long periods of time.

Those are the two audiences you have the best chance of converting to loyal viewers.

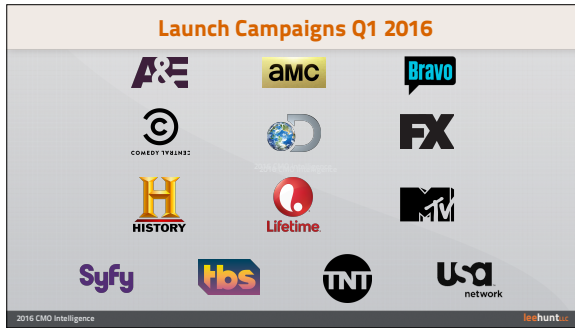


84

As for creative executions, you want to build enough different pieces of creative to handle high frequency scheduling. We know that there is a threshold of effective frequency—how many times a viewer needs to see a spot for it to be impactful. But we also know that viewed too many times a spot "burns out"—becomes ineffective and potentially creates a negative impression.

A campaign should have enough varied creative executions to avoid "burn out," but also to allow different creative points of entry to build intent to view.

Those are the text book answers. What about the reality? We decided to find out.



85

Using CMO Intelligence data, we tracked campaigns for new shows and new seasons that launched in the first quarter of 2016 across 13 general entertainment cable networks.

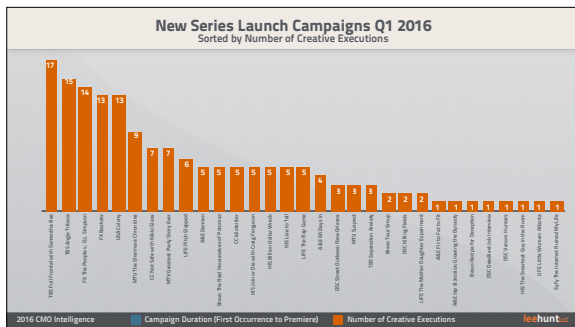
For campaign duration we measured from the first occurrence of a campaign promo until the premiere date of the new show or season, and plotted that time in number of days.

For the number of creative executions we counted each of the unique creative approaches we found on-air, but no cut-downs or re-versioning.



86

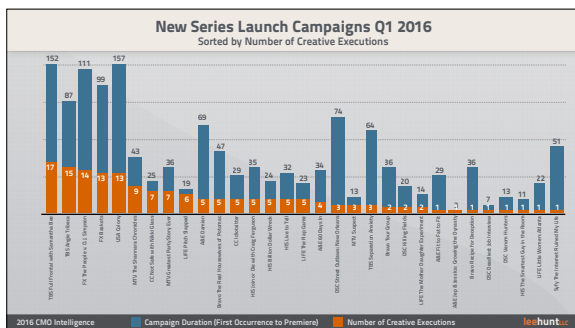
What we found was that on these 13 channels during the first quarter of 2016, January 1st through March 31st, there were 31 new series launches and 43 new season launches.



87

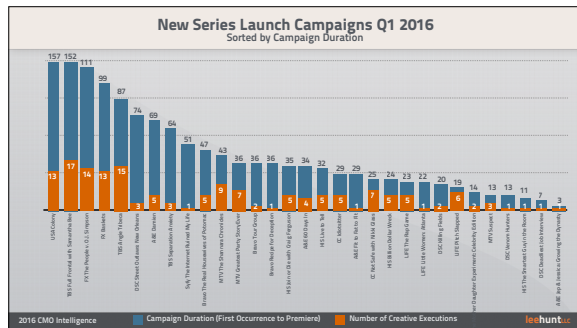
First we sorted new series launches by the number of creative executions. They ranged from a high of 17 down to a single execution, with 5 being the average.

I know this is a lot of detail, but we'll zoom in in a minute.



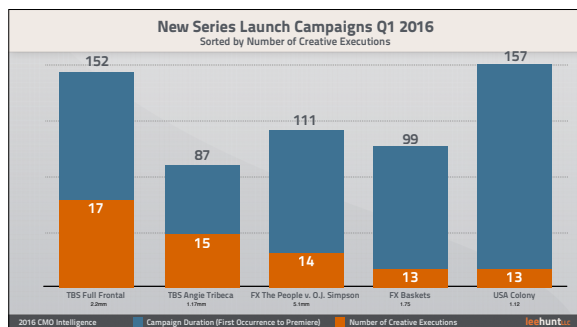
88

Next we overlaid the campaign duration in days. There are some trends, particularly among the top 5. But as you can see, there are a lot of outliers as well.



89

So we resorted by campaign duration, just to see if we were missing any patterns.

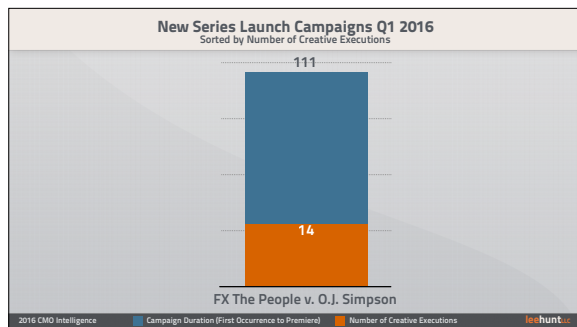


90

Now let's zoom in on the top five of both creative executions and campaign duration.

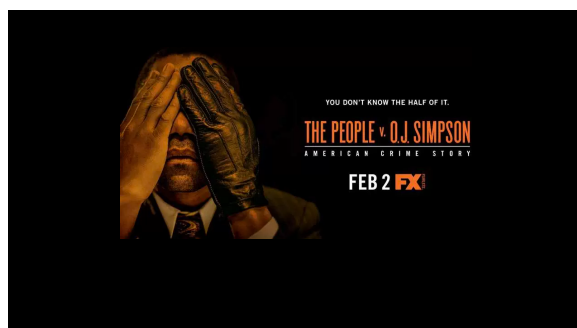
You can see that TBS's Full Frontal with Samantha Bee and USA's Colony had the longest campaigns. But we need to point out that both these series had their launch dates pushed after the campaigns had already begun. Colony from Fall 2015 to January 2016 and Full Frontal from January to February.

Nevertheless, all 5 of these had successful premieres, and with the exception of The People v. O.J. Simpson—which was a one-off series, they have all been renewed for a second season.



91

But let's take a closer look at The People v. O.J. Simpson. There were 14 different creative executions in the launch campaign spread out over 16 weeks.



92

And as we all know, the series became cable's most-watched new series of 2016 and the FX's top-rated first-year series ever.

So we thought it would interesting to watch the creative progression of the on-air campaign, from the first teases through to the proof of performance spot that aired the night of the premiere.

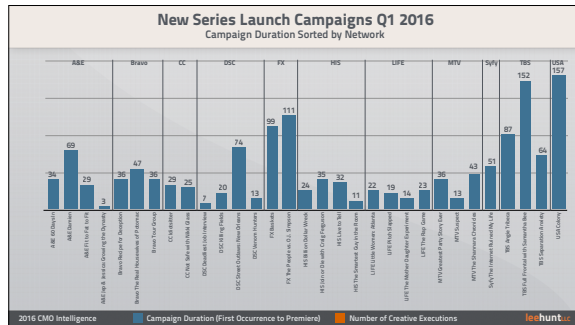


93

We assembled the 14 pieces of unique creative we captured, and placed them on a timeline starting 16 weeks before the launch, and roughly which week each new piece of creative premiered.

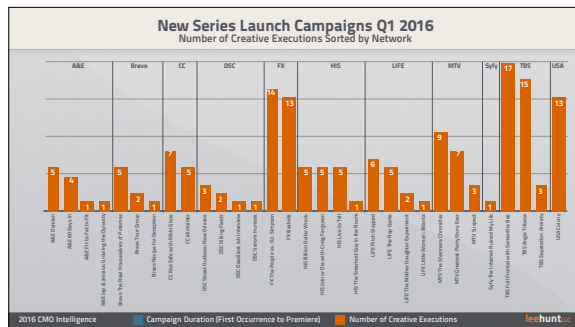
Take a look.

(5:19 FX The People v. O.J. Simpson montage)



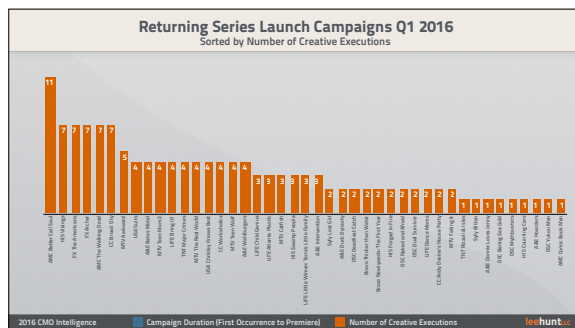
94

Here we've sorted by network, and as you'll see FX as a general rule likes long lead times in developing intent to view.



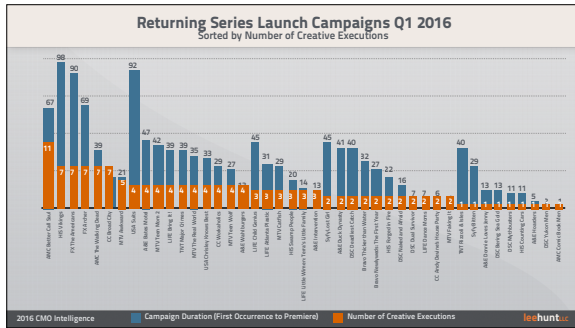
95

And as we've seen year after year at the PromaxBDA awards, they know how to make lots of great creative.



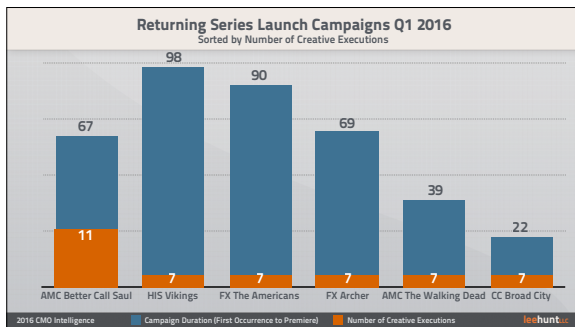
96

When we looked at returning series, the number of creative executions wasn't nearly as high. That makes sense; these are shows our viewers are already familiar with. We found the average number of creative executions this quarter to be a little over 3.



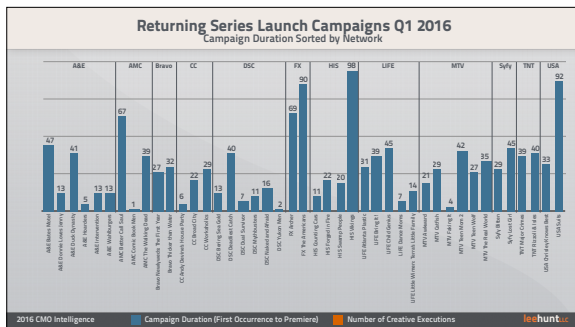
97

Paired with campaign duration, you see a cluster of long campaigns with a healthy amount of creative executions on the left.



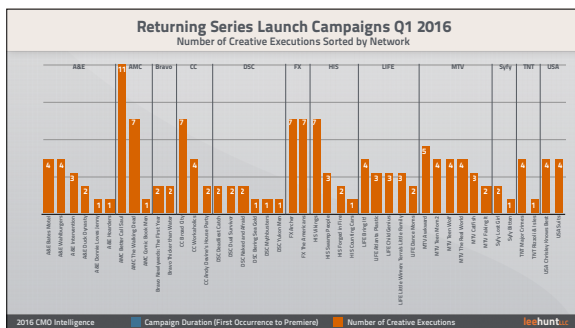
98

Zooming in on the top 6, we see FX once again with long leads, as well as AMC, History and Comedy Central. And note, each of these shows has been very successful for its network.



99

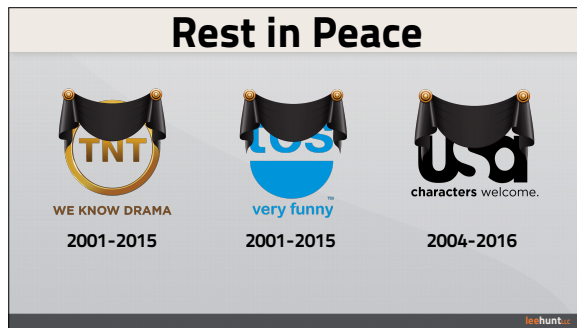
Sorting by network we see a range of lead times, but FX once again holding consistent in both campaign duration...



100

...and creative executions, with AMC's Better Call Saul being the outlier here.

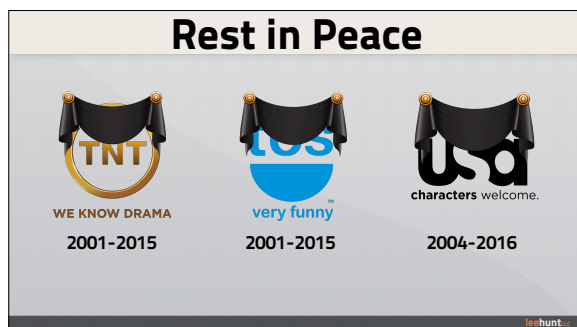
So there does seem to be a correlation between longer campaigns, more creative, and ratings success. It certainly warrants more study.



101

I think we should take a moment of silence to say goodbye to three brand positions that changed the face of television. TNT's We Know Drama, TBS' Very Funny, and USA's Character's Welcome.

They were the first general entertainment cable networks that tried to stand for one thing—not an easy task when you have lots of different content for different audiences.



102

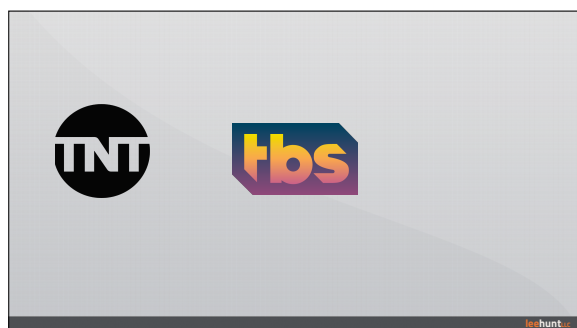
TNT's drama positioning lasted the longest—14 years by my count—an incredible feat of brand discipline by any measure, but particularly in the ephemeral world of television. But at least they went out with a 'bam.'



103

(0:04 TNT Boom)

OK. A boom.



104

So what happened? Why did they change? And why all pretty much at the same time?

We know the Turner changes began when Kevin Reilly became Chief Creative Officer for Turner Entertainment Networks. And while we saw some really interesting TNT series at the upfront we're still waiting to see exactly what TNT becomes.

But it is interesting, almost as soon as TNT dropped drama, someone else picked it up.



105

(:30 AMC Brand Dramatically Different)

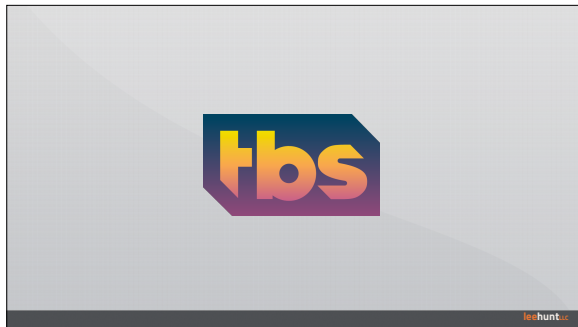
I think that speaks to how powerful a position it is.



106

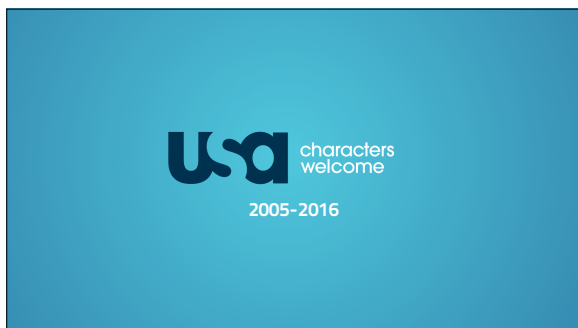
And while we don't yet know what TNT will become, we've seen a lot of changes at sister network TBS, and this is how they describe themselves.

(:30 TBS Is)



107

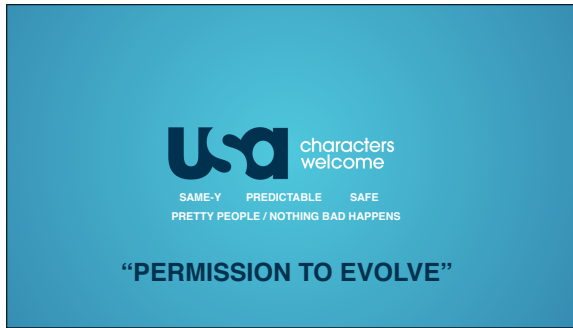
It will be interesting to see how that translates to a brand position.



108

But what about USA? Within 6 months of introducing Characters Welcome back in 2005, they became the number one general entertainment channel. A position they held for more than a decade. Why did they change?

Alexandra Shapiro, USA's EVP of Marketing, has allowed me to share the case study of their shift from Characters Welcome to their new positioning.



109

In 2014, USA began to notice some wear and tear on the brand. Viewers found much of the programming was 'predictable, same-y, safe.' They still had great affection for the brand, but let USA know that it had 'permission to evolve.'

What happened?



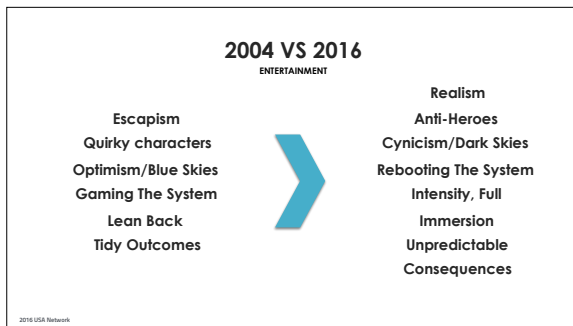
110

In their research, USA found, not surprisingly, that a lot had changed since the development of Characters Welcome in 2004.

There was a Darker Mood: Americans were experiencing a pervasive sense of national and personal disequilibrium. And this was before Donald Trump.

Disruptive Technology was transforming every aspect of our lives, including what we watch and where.

Elevated Mainstream Tastes: Increased access to content had raised consumers' expectations.



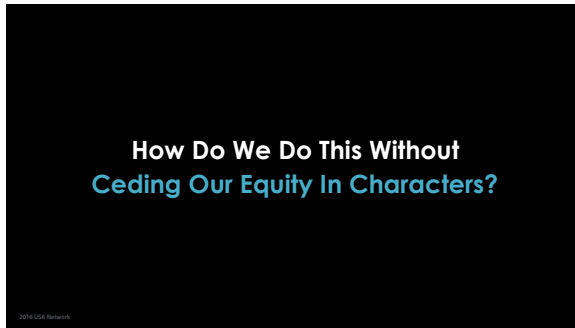
111

The brand filters that worked so well in 2004 were not as relevant or resonant in 2016. So USA put a toe in the water with a series that was purposely off-brand...



112

Mr. Robot. Programming that was brave, bold, daring. Everything USA wasn't. And it worked.



113

That created a dilemma for USA. "How to we embrace these new values without losing what made our brand so unique and powerful?"

We saw what happened when TNT dropped drama. USA realized that they wanted and needed to keep what had made them so successful—their people-based brand.



114

So they brought in Elaine Cantwell to take them through her "What If?" process—a visual projection exercise that looks for patterns in lifestyle brand choices that could inspire the TV brand.



115

What if USA was a car, a politician, a phone, a magazine, a restaurant, a clothing line, on and on?

And what they came back with were brands you'd expect every channel would want to emulate. What I call "of the moment" brands. Apple, Tesla, Wired, Shake Shack.

But they dug a bit deeper and noticed an interesting connective tissue. These brands had something else in common.



116

Almost all were created by a single visionary. Steve Jobs. Elon Musk. Graydon Carter. They were brands created by risk takers.

How is that unique?

Everyone knows that Apple was Steve Jobs. But who's the visionary behind Samsung? And who cares? That was the difference.



117

And they realized that the millennial audience they were targeting had their own generation of risk takers.

And that brought them to what I always call the “duh” moment.

The solution was additive.



118

Take characters and filter them through the values that would define their programming now, and going forward.

A brand position that allows them to connect all their disparate programming—series, wrestling, reality, special events—in the linear world, and act as a filter in the on demand world.

I probably wouldn't have clicked the on-demand tab for “characters”—that's too broad. But an on-demand tab for “risk-takers?” That's an intriguing category of content.



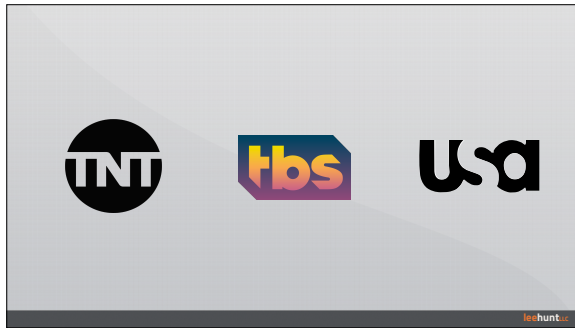
119

The solution: a values based brand, anchored by characters.



120

(2:20 USA We the Bold montage)



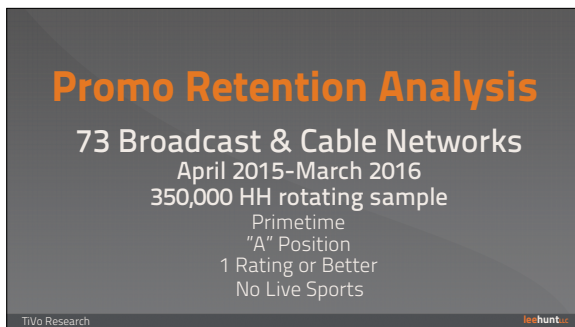
121

We'll check back in with all three of these brands next year, and see if they've found brand positions that can last another decade.



122

We're already near the end, so now it's time for the third annual Stickiest Promos of the Year awards. You may remember from previous years, we look for the stickiest promos on TV—the spots that retain the greatest percentage of audience coming out of content.



123

Working with second by second ratings from TiVo Research that include TiVo, Charter and FourthWall Media set top boxes we looked at an entire year's worth of promos from 73 broadcast and cable networks in a daily rotating sample of 350,000 US households. To determine the stickiest promos, we only looked at spots that aired in that valuable 'A' position of a break. We didn't want commercial erosion to impact the results. We wanted to see which network's promos retained the most audience going directly from content to promo.

We set a threshold of a 1 rating to make sure we had a representative sample. And we eliminated live sports.



124

Coming in at #5, and a first entry into the sticky world, is truTV with a spot for The Carbonaro Effect. This spot ran in the first break of the 10pm airing of Impractical Jokers on September 3, 2015. (:30 truTV Carbonaro Effect)



125

Next up was Discovery Channel. This promo, an episodic for Bering Sea Gold, also aired in the first break, of Mythbusters, on September 5, 2015.
(:30 DSC Bering Sea Gold)



126

Next we have CW's The Flash. Unlike the previous two promos, this spot aired in the squeeze credits of Arrow on November 18, 2015. It's for a special 2-episode cross over event with Arrow and the Flash, making it particularly sticky.
(:30 CW The Flash)



127

Coming in at #2 is BBC America and their promo for Luther. It aired December 5, 2015 inside of Doctor Who.
(:30 Luther)



128

And, for the second year running, the stickiest spot of the year was from NBC. This year it was for You, Me & the Apocalypse airing in the squeeze of Heroes Reborn on January 21, 2016. Ironically, as sticky as the spot was, neither of these shows are on air anymore.
(:30 NBC You, Me & the Apocalypse)



129

There's one spot that didn't make it to this year's Stickiest promos. But it's one of the smartest spots I've ever seen.

As we saw, The People v. O.J. Simpson was a huge success for FX. So in the last episode, which was also the highest rated episode, in the last break, just after the jury has found O.J. not guilty, this is what FX scheduled in the 'A' position of the break.

We'll pick it up a couple of minutes before the break. I've condensed a bit of the content to give you a sense of the emotional peak going into the break.



130

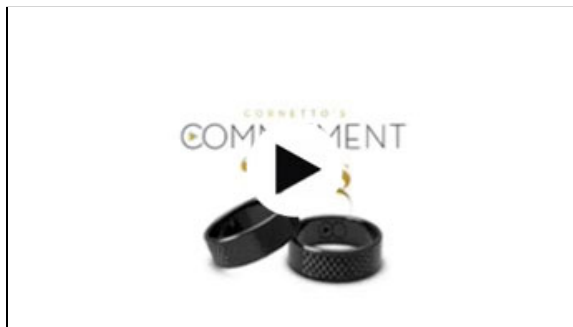
(1:04 FX Atlanta)

That is promo genius!

That's it for this year, but before I go I want to leave you with a special spot.

You might remember a couple of years ago we talked about the brilliant Netflix marketing campaign around Netflix adultery—when your significant other watches ahead of you.

Well, it seems like someone came up with a solution.



131

(1:52 Commitment Rings)



132

Thanks again for spending the afternoon with me. And as always, you can find a pdf copy of this presentation with embedded video at my website. Enjoy the rest of the conference.