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Robin Williams returns to the small screen as an ad exec in *The Crazy Ones*.

12

Branded content daydreaming

TV/brand partnerships we'd
like to see

14

Fall TV

Being upfront about the upfronts,
plus hot (and not)
show picks

48

Happy 100th Hellmann's

Here's to a century of
keeping it real

4 Editorial TV's step-change season • **8 Upfront** A webisode roundup, new branded content players and overly complicated loyalty programs • **20 Spotlight-stealing shows** make it cool to talk about TV again • **22 Analytics complaint line** fields problems with metrics in the modern world • **26 Daytime TV** thinks outside the housewife demo • **30 Specialty TV's** next big hits and ones to watch • **36 Battling it out in primetime** Experts weigh in on fall hits and misses • **46 The grid** breaks down the new primetime sked • **58 Who shared AToMiC ideas** at this year's conference and award show • **60 Forum** Free Agency's Chris Unwin advocates watchable branded content and Bensimon Byrne's Max Valiquette rails against the second-screen mindset • **62 Back page** Red Urban gives us a retro, touch-screen-free TV



ON THE COVER

The TV network upfronts are known as one big party season, but it's come to be about more than wining and dining your biggest bulk media buyers. Digital behemoths have crashed the festivities with big, original content pushes, and brands are re-evaluating their ad buying strategy in a nimble world, meaning the networks are changing things up. The party's not dead – just evolving, and there's no use crying over spilt booze. Though this blood-red concoction on our cover, captured by Toronto photographer Edward Pond, does look tasty.

Content wins the throne game

The major players at Brunico's recent Stream event in Santa Monica, California (the world's first internet programming market), many of whom hail from the film and TV biz, seem to be anticipating a near-future where all content streams.

Media companies that create their own content and have a unique brand are good to go, but those who essentially rent content for a geographic window will have limited abilities to adapt.

A lot of shows that have rabidly loyal audiences – *The Walking Dead*, *Game of Thrones*, *Arrested Development* – aren't even on platforms Canadian brands can advertise on. Beyond the odd (literally) binge viewing guilty pleasure like *Duck Dynasty*, the younger demo is simply not buying into network TV grids. And then there's YouTube, now with content like *Comedians In Cars Getting Coffee*.

So we asked Katie Bailey to see what impact the audience change has wrought on the upfronts (p. 15). She found it's curiously unchanged. Despite dramatic shrinkage of mass, upfronts are still the time when planning comes to a head and media money gets allocated.

For brands that need a mass consumer base, upfronts are still the safest bet. But brand plans need to be more fluid and that's affected the old lock-and-load model.

Also, incursions and challenges to the model have not been addressed. Brands unhappy with escalating costs and dwindling share – seeking solid metrics across the many screens – have yet to be satisfied.

Ditto for consumers. Busy protecting the current business model, whether from the cable or broadcast side (or both), Canada's big TV players haven't leapt in with solutions to

rival Netflix or torrents' ease of anytime consumption. Meanwhile, more players are stepping up to offer easier access to the digital streaming audience TV is missing.

It's no wonder everyone is keen on giving branded entertainment a shot. This area has become the new Wild West of advertising, where every type of agency – from media to creative – is staking out turf. And while some of this content will get network deals, if the volume grows the way it's projected, more will go online, competing with primetime for viewer attention. As the competition piles on, it's time for some radical set adjustment. Viewers are gobbling up whole seasons on Netflix, and while network video players aren't competing, the advantages the networks have – the power of a brand, an existing audience base and longstanding advertiser relationships – give them an edge that can be leveraged. The good news is they're spending more on original content. Despite an 85% profit drop last year, conventional stations invested 17.6% more on Canadian programming.

So it seems that in our cloud-floating, streaming-media new-behaviour space, everyone's prepping for a new regime. Some distributors may be cut out, but content wins the throne game. And since content is an expensive battleground – for a market that could barely support a commercial production industry – it's time for the networks to amp up their digital battle plans, and for brands to support those efforts.

Cheers, mm

Mary Maddever, exec editor, *strategy*, *Media in Canada* and *stimulant*



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Effectiveness in the modern age

As traditional media converges on mobile devices that are rapidly transforming not only how we consume media but the way we socialize and communicate, it's a special time to be a marketer. New skills are required to develop campaigns for – and to procure – digitally delivered media, the consumer mindset is shifting toward an “and” mentality (value and quality, for example) instead of “or,” product differentiation is more difficult to achieve and new economic models are rapidly being deployed by fast-adapting businesses.



Yet, our advertising paradigm endures. Engagement continues to be the central objective, and storytelling drives that connection. What's different for marketers today is the potential (and expectation) to build tighter linkages to sales within their marketing programs. In short, it's not cool to suggest you don't know which half of your budget is working for you. That's not to say that every program needs a direct and measureable sales outcome. But with today's technology and sophistication in isolation testing techniques, we should be able to trace, if not infer, relative lift and shift.

It's time to sharpen your yardstick, and while you're at it why not grab some glory? The CASSIES entry deadline is on deck and Canada's leading advertising effectiveness awards program is ready to accept all contenders to separate the campaigns that did an admirable job building new business from those that were exceptional at it. While creative prowess is table stakes, what makes winning a CASSIES critically important to the majority of this competition's entrants (yes, we asked them) is that it's about the only measure that matters – the business result. There are no shortcuts, no technological innovation or creative masterstroke to rest upon. It's a question of how well you knew your target consumer, the originality of the idea, the quality of the strategic underpinnings of the case and, most importantly, how it moved the needle on sales.

The world of marketing may be changing, but winning the prize for effectiveness endures. Enter at CASSIES.ca by Aug. 1 and benchmark your work against the best in the business.

Russell Goldstein
Executive publisher, *strategy*, *Media in Canada* and *stimulant*

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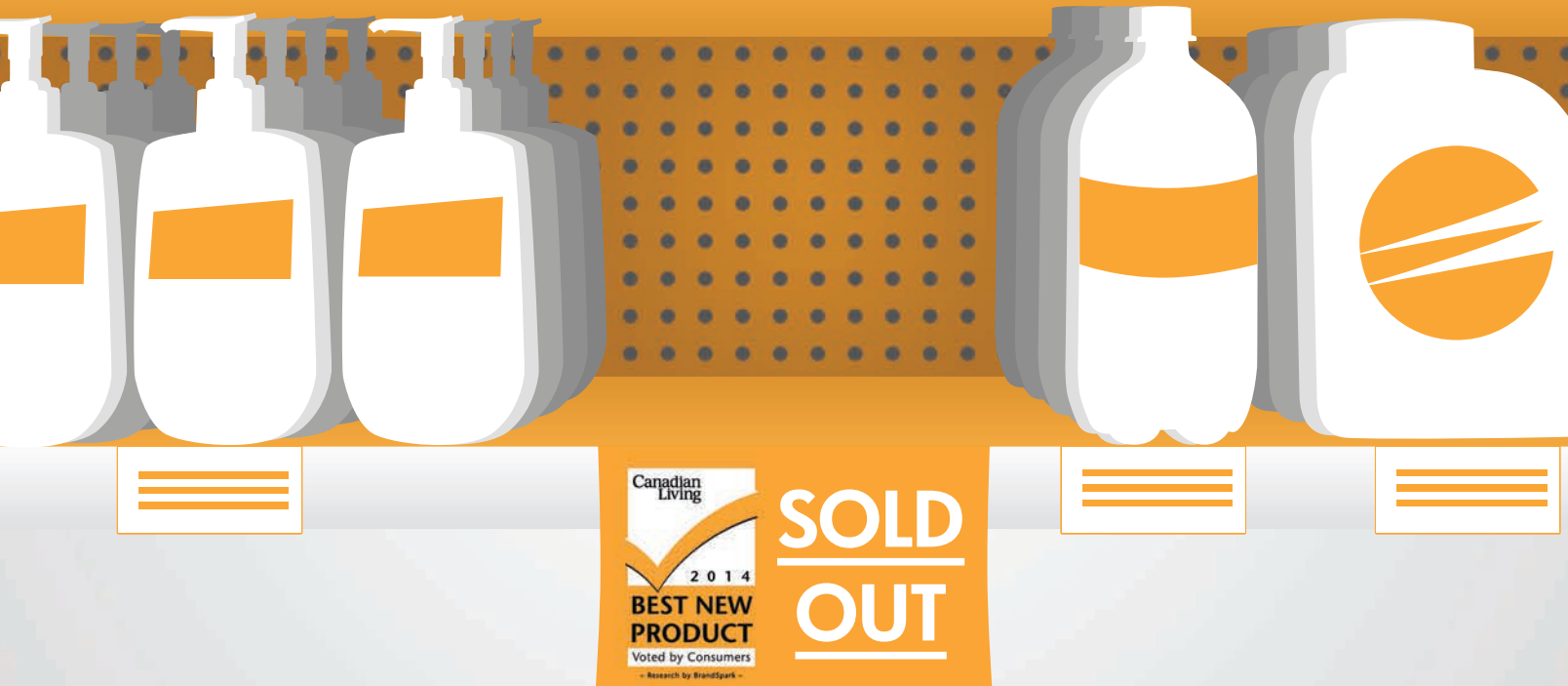
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NETWORKS TAKE TO THE WEB

By Jennifer Horn

Some broadcasters are competing for eyeballs lost to digital by following the adage, "If you can't beat 'em, join 'em." Networks are increasingly creating their own web series, launching digital extensions of TV shows and even repurposing webisodes for broadcast viewing.

Above: Roger Cross (left) and Brendan Penny star in CTV's digital series *The Dark Corner*.

BACKPACKERS (CURRENTLY IN PRODUCTION)

The interactive live-action online series, produced by Shaftesbury's Smokebomb Entertainment unit, is the first show for CTV that doesn't include a TV time slot. The eight-part show, which follows two best friends during a pre-wedding European vacation, is meant to be the jump-off point for Bell Media's future delivery of standalone digital content across multiple platforms.

CONTINUUM INTERACTIVE (DEBUTED APRIL 29, 2013)

Showcase's Continuum Interactive project, produced with Secret Location, uses Twitter's Vine app to extend the storyline of the network's science fiction TV show. After each episode of *Continuum*, an anonymous webmaster uploads a six-second clip to expand on the conflict between a rebel group and a police officer from the future. Viewers can choose a side by sharing the videos or creating their own Vine videos, and in turn, influence the outcome of the show. At press time, Showcase tracked more than 8,000 social media interactions.

THE DARK CORNER (DEBUTED MARCH 28, 2013)

For CTV's *Motive*, the network produced an exclusively digital series as a companion to the Canadian cop drama. All eight episodes were released simultaneously and explore the solving of a cold case file with scenes from the past and the present, much the same as the TV format (but with a Netflix-style release strategy). *Motive*, which had 1.04 million viewers tune in to watch the first-season finale in May, and *The Dark Corner*, which CTV declined to disclose results for, were produced by Foundation Features and Lark Productions.

EVERYONE'S FAMOUS (DEBUTED ONLINE APRIL 30, 2013 AND LAUNCHED ON CBC IN JUNE)

The comedy, created by producers Angus Swantee and Walter Forsyth, was originally meant for online, premiering on YouTube as well as CBC Download, but was picked up by the broadcaster and debuted on TV in June. The seven-part series aired as one 45-minute special, coinciding with the release of the last episode online. Fittingly, the show is about the power of online video, following an average man who becomes known for an embarrassing video that goes viral.

E-BOOKS: NEXT TRANSMEDIA EVOLUTION?

By Megan Haynes

Brampton, ON-based Entertainment One and U.K. producer Bryan Elsley have partnered up to release e-books based on his new TV series *Dates* set to air on Channel 4 in the U.K.

The show is a nine-part, half-hour drama that examines the complexities of modern relationships through various dates.

The e-books, which can be purchased individually or as a set of 10, will take the



reader deeper into characters' lives, and occasionally pick up where the character left things on screen.

"We want our audience to enjoy the television series and then deepen

their experience with an absorbing set of short stories which bring them even closer to the characters," Elsley said in a statement.

Books and TV shows have a long symbiotic history. It's quite common for TV shows to be based on books, such as the upcoming shows, *Klondike* and *The Last Ship*, not to mention super-popular *Game of Thrones* and *Dexter*. And kids entertainment franchises not already based on literary properties almost always spin out into books.

Less common is the adult TV-to-book formula, though that does remain popular in the sci-fi/fantasy realm, with cult favourites like *Buffy the Vampire Slayer* and *Firefly* garnering continued comic book audiences.

But with the proliferation of tablets, the e-book-only offerings seems a natural space for brands looking to extend the viewing experience, continuing transmedia's evolution beyond webisodes and games.

With files from Danielle Ng-See-Quan

SHOWS ON THE ROCKS

By Matthew Chung

In tribute to the fall TV upfronts, known both for the unveiling of new shows and the consuming of delicious drinks at the after-parties, the time seems ripe to explore TV and alcohol brand integrations. Ryan Desjardins, a mixology instructor at BartenderOne in Toronto who works behind the wood at College Street Bar, has created some concoctions for four of this season's new series and laid out the ingredients (he also snapped the photos), so you can drink while you watch.



SERIES: THE BLACKLIST MONDAYS AT 10 P.M. ON GLOBAL

Synopsis: Ex-government agent Raymond Reddington, one of the FBI's most wanted fugitives, has surrendered with an offer: he will help them catch people on his "blacklist" (a laundry list of criminals only Reddington knows about), under the condition that he speaks only to Elizabeth Keen, a woman with whom he seemingly has no connection.

Drink: Blacklisted: a rich, strong, slightly sweet spirit-forward cocktail.

Ingredients: 1.5 oz. Jim Beam bourbon, .25 oz. Amaro Averna, .5 oz. Aperol, .25 oz. Carpano Formula Antica sweet vermouth, 2-3 dashes of Angostura bitters, grapefruit zest.

Preparation: Put all alcohol in a mixing glass with ice and stir until chilled. Pour into a rocks glass, add bitters and garnish with grapefruit zest.



SERIES: CROSSING LINES TUESDAYS AT 9 P.M. ON CBC

Synopsis: A crime drama revolving around a special law enforcement unit mandated by the International Criminal Court to investigate cross-border crimes.

Drink: Breaking boundaries: smooth and delicate with a lot of body and power to it. This drink uses ingredients from many of the borders we cross.

Ingredients: .75 oz. Grey Goose vodka, .75 oz. Cazadores Reposado tequila, .5 oz. Ramazzotti amaro, .5 oz. Cointreau orange liqueur, orange zest.

Preparation: Place all ingredients into a mixing glass with ice and stir until chilled. Pour into a glass and add orange zest.



SERIES: THE TOMORROW PEOPLE WEDNESDAYS AT 7 P.M. ON CTV

Synopsis: A genetically advanced race with abilities like telekinesis and teleportation are hunted by a paramilitary group known as Ultra.

Drink: The Breakout: has a silky texture but packs a punch.

Ingredients: 1.25 oz. Beefeater dry gin, .5 oz. St. Germain liqueur, .5 oz. Campari liqueur, .75 oz. simple syrup, .75 oz. ruby red grapefruit juice, 1 oz. egg whites.

Preparation: Place all ingredients in a mixing glass and shake without ice for 10 seconds. Add ice and shake for another 15 seconds. Strain into a cocktail glass.



SERIES: THE CRAZY ONES THURSDAY'S AT 9 P.M. ON CITY

Synopsis: This comedy set in the advertising world (sweet) revolves around the relationship between the head of a powerful agency and his daughter who works with him.

Drink: Spiced and Ready: has a spicy kick and is very refreshing.

Ingredients: 1.5 oz. Bacardi Oakheart Spiced Rum, 1.5 oz. fresh lime juice, 1 oz. simple syrup, a bunch of basil, soda.

Preparation: Place all ingredients into a collins glass with basil on the bottom. Muddle the basil. Add ice and stir. Top with soda. Place a basil sprig on top for a garnish.

TOURISM SHOWDOWN:

NOVA SCOTIA VS. NEWFOUNDLAND



TV viewers who recently caught Nova Scotia Tourism's 2013 "Take Yourself There" campaign by Halifax-based Extreme Group, and who've seen Newfoundland and Labrador's "Find Yourself" spots by St. John's-based Target over the years, could be forgiven if they found some elements a bit similar. Newfoundland's campaign – first launched in 2006 with 16 spots in rotation – has been a success, picking up a slew of awards. Will Nova Scotia's latest effort emulate that success with a similar approach?

YOUNG AT HEART

NEWFOUNDLAND AND LABRADOR

A spot from 2012 boasts that exploring the sights in Iceberg Alley will make you feel like "you're nine again" while another features a child running to "Mistaken Point," a place with 565-million-year-old fossils trapped in volcanic ash.

NOVA SCOTIA

A spot this year asks the viewer if they "remember what it's like to truly let [themselves] go?" while another juxtaposes a scene of two children jumping in puddles and laughing with that of two women laughing as they're splashed by waves while whale watching.

Nostalgia score: One ice cream cone to Nova Scotia for best childhood memories spots.

EXTREME OOH

NEWFOUNDLAND AND LABRADOR

The province brought its colourful clothesline concept to Toronto in 2007, erecting a clothesline with white sheets against a scenic backdrop on a billboard near Toronto's Gardiner Expressway with the message: "No. I'd rather sit in traffic."



NOVA SCOTIA

This year, Nova Scotia brought its landmark tourist sight, Peggy's Cove,

to Toronto's downtown core, erecting a replica lighthouse.

Local flavour score: One box of detergent to Newfoundland and Labrador for clever messaging.

The verdict: the win goes to Newfoundland and Labrador for doing it first, and for having its own time zone. MC

MEET THE NEW PLAYERS IN BRANDED CONTENT

By Emily Wexler

Could this be the death knell for the 30-second spot? While not a new concept, branded content is hot right now. So hot, in fact, that a few industry heavyweights have taken the plunge and started branded content companies, offering up entertainment concepts to brands that want to be baked right in.

"The current economic model is being challenged," says Tony Chapman, CEO of Capital C, which is no stranger to branded content, having created programs for clients like Nissan and Pepsi. "The Canadian networks have to fund Canadian content as part of their licensing agreements. They need to create content that is engaging, relevant... Advertising revenue is declining, and filters/fast forwarding make it easier for consumers to bypass ads. It's not that they don't like ads. They simply want to watch content uninterrupted."

So Chapman is dipping his toe further into the branded content pool with a new venture called, fittingly, Branded Content Television (BCT).

Anatomy by doing on-set vignettes with HomeSense.

She says BCT will have a flexible model and a 360 approach: "It doesn't have to necessarily start with the network; we can create content [or] we can have a brand come to us. We will satisfy the need with whatever model we feel best suits the brand, network or distributor," she says.

"[It extends to] social media and goes all the way through the chain to retail where you're at the end of the aisle with a display. It's the head-heart-hand approach."

BCT's first co-development deal is for *Totally Disorganized Woman* with Out There Productions, starring Melissa DiMarco, with more co-development productions to be announced in the near future.

Also entering the branded content ring is Cue Digital Media's David U.K., who has launched a branded entertainment venture, Bent, to deliver next-generation content on all platforms, not just digital.

"I've been doing branded content for Cue for many years; I really believe it's past the tipping point," says U.K. "It's at the point now that it needs its own hub, its own life, its own entity."

The company partners U.K. with ex-Chum Television exec and Hercules Media Group's Stephen Tapp, advertising veteran Christopher Grimston, and writer/director/producer James Hyslop.

Bent aims to produce content across all platforms, whether long or short format, reality, animation, factual or theatrical.

The upstart company will also provide one-stop creative development to production servicing for a range of clients, including ad agencies, brands, broadcasters and publishers.

"We want to talk to media agencies that have clients looking for ideation and innovation," says U.K. "[and] creative agencies that are already outsourcing this to prodcos – [We] can understand their ideas and take them to fruition and execution – [as well as] brands who don't have agencies who rep them. And we want to talk to the Canadian industry – the print companies, TV companies – a lot of them are outsourcing their branded content initiatives so they can create environments to sell to their advertisers around, and they're also looking to develop video, because honestly, it's in short supply, and Canadian broadcasters and publishers are starving for video."

With files from Danielle Ng-See-Quan and Etan Vlessing



Carmen Lago, former director of brand partnerships at Bell Media, will head up the venture, with Chapman on board as a BCT advisor and investor.

BCT, headquartered at the Frantic Films office in downtown Toronto, will create original multi-platform content that incorporates client brands into the storyline. The company will also work with brands to package content and negotiate media deals to increase ROI through non-traditional media buys.

Lago has plenty of experience in the branded content arena, having worked on programs at Chum with *Cityline*, and more recently at Bell with shows like *Grey's*



THE RISKS OF OVER-COMPLICATED LOYALTY PROGRAMS

By Megan Haynes

Paul Tedesco, VP at RAPP, DDB's CRM and digital marketing arm, estimates he's signed up for at least 30 loyalty programs, but chalks that up to market research. He figures he's got 10 programs he actually wants to participate in, but only five cards he'll pull out of his wallet.

"There are five that I don't pay any attention to whatsoever," he says. "They've made it too hard for me to participate in the program."

He's not alone in this. One Colloquy study found that Canadians carry, on average, eight loyalty cards at any given time, a drop from nine in 2008. This is despite a boom in new programs in that same time frame, including Indigo's Plum Rewards, Target's Red Card and Loblaw's PC Plus.

So why the decline? One explanation is that programs are becoming too complicated, says Jeff Berry, senior director of knowledge development at LoyaltyOne, which owns Colloquy. It's a trend they've noticed globally, he says, and not one that's likely to abate anytime soon.

For one thing, the market has become saturated. In the past few years, a number of retailers and brands have introduced new cards to the market while third-party app developers have seized on the opportunity to connect brands and consumers with apps such as Freshpoints, which rewards consumers for writing product reviews, and Checkout 51, which gives consumers discounts for taking photos of their receipts. Loyalty programs have new ways to reward consumers as well, such as Shoppers Drug Mart's program, which gave points for playing a virtual game and connecting over Facebook.

But more than that, loyalty programs have moved away from simple "buy a product, get points" transactions.

Now, it's: download the app, play the game, receive points, send us your email, enter a code to redeem the points. Or, go online to fill out a survey, answer five pages of personal and shopping-trip related questions, go back in store to redeem your points.

"Loyalty at the end of the day is all about data," says Manu Sarna, general manager, retail at Aeroplan. "It's tempting for some

companies to just want to get more."

He says companies are looking for ways to increase personalization and tailored communication – promotions and coupons specifically geared at the individual shopper. But to personalize, brands need three things: a compelling currency, valid email address and some information about the consumer. For many new entrants into the loyalty space, these complicated programs are a way to catch up. "A good program will encourage you to share that information over time. A bad program will force you to share that info [through complex information grabs]," Sarna says.

Most brands over-estimate the value of the end reward and under-estimate the cost (read: time) to consumers up front, Tedesco says.

Also, for brands such as Shoppers, which has slowly amassed a wealth of consumer data and now layers in personalized offers on top of its mainstream program, keeping track of all the various incentives can be confusing for the consumer and potentially frustrating at checkout when they're unable to redeem multiple offers.

Consumer technology has driven things forward while simultaneously complicating matters, Berry adds. Geo-locating smartphones are, in theory, capable of sending out personalized promotions, but are still a ways off, NFC hasn't reached Canadian markets, and retailers' POS systems don't necessarily work with mobile barcodes or promotions, which results in a mish-mash of programs and ways of connecting with consumers.

However, with mobile wallets, NFC and more sophisticated geo-locating apps on the horizon, Tedesco says, "We're catching up quick."

But for those unwilling to wait for tech to catch up, Berry points to Starbucks' reward program as the ideal. It works the same across the cards or mobile app, linking credit cards to Starbucks Rewards, eliminating the need to carry money to stores. Purchases lead to rewards, which are tiered. The most basic level is a single birthday coffee for a single purchase, while at the top tier (which only requires 12 purchases), the 12th coffee is free. Users can choose to opt-in for more ways to get personalized coupons and offers either over email, text or through the app. No printed coupons necessary.

CORRECTION: In the June 2013 issue of *strategy* it was erroneously reported that H&M produced garments in the Rana Plaza Factory in Dhaka, Bangladesh, which collapsed in April 2013. *Strategy* regrets the error.

All the world's a (branded content) stage

BY MEGAN HAYNES

It's no longer enough to throw money at a TV show and have your name all over it. Now brands are creating 360-degree branded content platforms and closing the TV-to-purchase loop, with shows like L'Oréal's *Canada's Best Beauty Talent* and Loblaw's *Recipe to Riches* (just picked up by the CBC) leading the way. We tasked industry experts with creating their own perfect branded content execution. The sky was the limits: they could create their own show or tap an existing one. As brand and entertainment borders blur, this is the future of content.

MATCH MADE IN HEALTH HEAVEN



Linda Cronin,
VP, integrated
marketing,
Canadian business
unit, Coca-Cola.

I'd love to see an integration between CTV's *The Amazing Race Canada* and ParticipAction to encourage conversation and action around physical activity.

Before the show is taped, teens throughout Canada would be encouraged to submit movement-based tasks that will become *Amazing Race* roadblocks, fast forwards or U-turns (challenges the contestants must perform). Those whose submitted ideas are chosen would be awarded grants (from the show or ParticipAction sponsors) towards a community active-living program.

Taking it a step further, the *Amazing Race* teams' ability to win challenges would depend on how successful they are at getting people in the community involved in each of the tasks. For example, teams might have to gather enough people from the street to create a flash mob, or gather folks to ride stationary bikes to produce enough energy to project the next clue on the side of a building.

As tasks are integrated into the program, there would be vignettes during the show that highlight the benefits of living an active life and provide tips on how to get friends and family to start "playing" through ParticipAction.

The winners/participants of the show would keep the conversation going by becoming ParticipAction ambassadors, speaking on news segments, blogs and talk shows about their journey and the importance (and fun) of physical activity.

INSIDER TRAINING



Tim McLaughlin,
brand manager,
Steam Whistle.

A weekly documentary show, *Off Season* (working title) would leverage Nike's pool of high-calibre endorsed athletes as they use Nike+ technology and the brand's performance apparel during intense off-season training regimens, in partnership with a sports broadcaster like TSN or Sportsnet.

The show would not only give viewers an intimate behind-the-scenes look at these training programs, but also showcase the role Nike products play. Viewers would also have the opportunity to become part of the action by replicating these workouts at home using Nike products.

Each show would start with an athlete brief to the Nike design team that includes a customized set of apparel needs for his or her specific training regimen. The show would then profile the Nike team designing a line that could be available for consumers to purchase following the show's air date.

Next, *Off Season* would take an in-depth look at this same athlete's workout program. For example, watching Kobe Bryant's legendary 666 training method comprised of two hours of running, two hours of basketball skills and two hours of



weightlifting, for a total of six hours a day, six days a week, for six months of the year.

The show would illustrate how Nike+ tech helps the athletes track their workouts, and allow viewers to emulate their favourite athlete's workouts at home on their Xbox 360 through the Nike+ Kinect platform.

Off Season would shed light on a side of superstar athletes that we rarely see – a more personal side. Ultimately, viewers get a clear understanding of the determination, dedication and obsessive drive required to be a world-class athlete, and how Nike is integral in helping athletes achieve greatness.

CAMPING OUT TO DRIVE TRAFFIC



Anthony Hello,
national account
director,
advertising, media
and branded
content specialist,
Bensimon Byrne.

Slice's *Big Brother Canada* proved that Atlantic Canadians can carry a reality show (the winner hails from Nova Scotia). With this in mind, I propose elevating the brand of my beloved home province, New Brunswick – which I've dishearteningly heard described as "the drive-through province" – via content.

Unlike its three neighbours in the east, New Brunswick has a shaky tourism identity but it's a big draw for campers. So in partnership with Tourism New Brunswick, Slice and Mountain Equipment Co-op, *Canadian Campers* (working title) would be an hour-long weekly reality series filmed on campgrounds across the province over the summer months.

The show would follow the exploits of a group of campers or backpackers as they bond – and sometimes clash – in the New Brunswick outdoors. Excursions spent salmon fishing on the Restigouche River, tapping maples in Dumfries and trapping lobster in Shediac, would showcase "I want to go there/do that" scenarios. The province's sweeping natural beauty serves as the



high-definition backdrop and visual foil to the intimate campsite environments. Where else on TV can you bond with the characters over stories told around the campfire?

Featured products integral to the weekly challenges, such as tents, hiking shoes or canteens, would be highlighted on MEC.ca and in stores on special displays placed next to tourism guides, picturesque tabletop books or local activity pamphlets.

Canadian Campers would inspire viewers to drive to (rather than through) New Brunswick come vacation time.

PHOTO (LEFT) BY NEW BRUNSWICK TOURISM



OLD PARTY, NEW GUESTS

BY VAL MALONEY

Above, clockwise from top left: *Marvel's Agents of S.H.I.E.L.D.*, *The Crazy Ones*, *The Michael J. Fox Show*, *Almost Human* and *The Blacklist* are among the most anticipated new shows.

With cord-cutters, cord-never-had-ers, digital Newfronts and some of the most buzzed-about shows airing on networks without commercials (like *Game of Thrones* on HBO) or non-traditional platforms (*Arrested Development* on Netflix), television is certainly not the same as it used to be.

But is the traditional model of locking in vast media spends at the upfronts really changing? We checked in with broadcasters, marketers and digital insiders to get the pulse of where things are headed (p. 15). In addition, we explored how new viewer competition is affecting traditional broadcasters' programming strategies (p. 20).

Since buying around hit programs is still the goal, we dissect the analytics measuring TV (p. 22), evaluate the daytime landscape (p. 26), get the goods on the next specialty stars (p. 30) and ask media buyers to pick and pan the new primetime shows (p. 36).

So turn off your multiple screens for a moment and take in the latest the TV world has to offer. Then tweet your thoughts on the new season to @Strategyonline while catching up on your favourite webisode (and maybe even watching some actual TV).

2013 FALL
TV



BEING UPFRONT

BY KATIE BAILEY

HOW VIEWER FRAGMENTATION IS SHAPING TELEVISION'S BIGGEST BUYING SEASON

Above: Alan Thicke (starring in new reality series *In the Thicke of It* on Slice this winter) puts on a show with performers at Shaw Media's upfront on June 5.

Until recently, the 30-second spot was king. It was the best – and really, the only – way for advertisers to reach a mass audience with a video-based message. The 30-second spot was so successful that it spawned its own mini-industry: the upfronts. Since its inception in the 1960s, upfronts have kicked off television's buying season, bringing media buyers and broadcasters together every spring to hash out whose ads would appear where, how often and at what prices for the year ahead.

But today, viewer fragmentation means mass is much more complicated. Yes, TV is still king, and represents one of the best ways to achieve reach and frequency with a national audience. But as media consumption and consumer habits have changed, so have the media buying trends that power the TV industry.

Remaining nearly identical in practice to its origins, the upfront environment today is most notably different for the fact that the legendary rivalries between networks are no longer the most heated in town.

TV itself faces a host of new rivals and even the upfronts are finding themselves elbows-out in a crowded room. The

Newfronts – the series of digital-only, upfront-style events hosted by major digital companies during the same time period as the television upfronts – seem to be gaining traction in the U.S., and famous TV producers, like Mark Burnett,



REMAINING NEARLY IDENTICAL TO ITS ORIGINS, THE UPFRONT ENVIRONMENT TODAY IS MOST NOTABLY DIFFERENT FOR THE FACT THAT THE LEGENDARY RIVALRIES BETWEEN NETWORKS ARE NO LONGER THE MOST HEATED IN TOWN

are calling for producers and advertisers to skip the broadcasters entirely and connect directly on development projects in a new “upfront” environment.

This poses an interesting question on the future of the traditional upfront media buy: where do advertisers fit when consumers skip traditional delivery channels? And how do media agencies continue to target and account for those consumers as they “change channels?” Make no mistake – these are questions keeping industry executives up at night. And the answers are far from clear.

“In the '90s, all top shows achieved double-digit ratings,” notes MediaCom investment director Chris Overholster. “For the past 10 years, due to viewing fragmentation, only three to four shows in the fall achieve double-digit ratings. [Today], we're still seeing a slow erosion of top 10 ratings, with a ‘nine’ being a top rating in 2005, and a ‘seven’ being a top rating now.”

The ratings haven't stopped advertisers – TV is maintaining its majority share of advertising dollars (per medium) in Canada – but the picture is more complicated than ever before.

TV PHOTO BY ALAN KLIM



Netflix made a big programming move this spring, posting 15 new episodes of cult hit *Arrested Development* in its ad-free, streaming environment.



City

Network: Rogers Media

Upfront date: June 4, 2013

Programming themes: **No upfront theme but the programming theme was definitely comedy.**

Star appearances: **Eva Longoria (*Mother Up!*), R-Truth (*WWE*), Lauren Ash (*Super Fun Night*), James Wolk (*The Crazy Ones*), the casts of: *Seed*, *Package Deal*, *Storage Wars Canada***

Worst joke: **Dina Pugliese on Rogers' agreement to host the Grammy Awards for the next three years: "We'll be offering coverage of the Grammys across all platforms, including Lady Gaga's platform shoes."**

Total # of new shows: **16 (eight comedies, six dramas, two reality shows)**

Surprise! **The rebranding of The Score as Sportsnet 360**

- Jordan Twiss

The Television Bureau of Canada says that 87% of adults 18 to 49 still prefer to watch their favourite shows on a television screen at home. But the important differentiation is that they are no longer gathering en masse to watch the must-see shows of the moment on conventional network stations.

"Top-rated shows are not as important to advertisers as they were a decade ago," confirms Michael Neale, chief investment officer, MediaCom Canada. "What is important in a screen-neutral world is targeting and relevancy."

"Conventional share of tuning in has declined 16% since 2001 to 32% of adults 25 to 54, coming in behind specialty at 39%," he explains. "And top-rated audience composition is getting older. Take *Survivor*, a top show for a decade. In 2004, 25% of its audience was over 50 [years old]. The most recent edition saw its 50-plus audience climb to 37%. That's a big premium for a very inexpensive and easy-to-reach TV audience."

There is also a growing segment of the population that doesn't subscribe to TV at all: 8% of Canadians, and increasing each year, according to a 2013 Media Technology Monitor report. These people tend to be young, highly

educated and "major" internet users, the report says. This is the cohort that has people worried: under-25 year olds, who don't even know or care about the difference between conventional and specialty, or the bundled packages that differentiate them. TV is just video. Period. They aren't cord cutters: they're cord-never-had-ers, torrent users and YouTube surfers.

THERE'S NO BUSINESS LIKE SHOW BUSINESS

Yet, traditional upfront television buying still holds appeal to many advertisers, especially major brands with a lot of "weight" to throw around.

Take a company like Unilever, a TV buying behemoth. The upfronts remain as vital to the company's media plan as ever, says Sharon MacLeod, the company's VP of marketing in Canada. The volume-based nature of the upfront buy – is still the best way for the company to meet its media objectives.

"The reality is there's going to be a chunk we're investing and we want to get the very best deal out of the gate. We want to have the best programming," says MacLeod. "We buy way too much media to be waiting for whatever happens to be

available. We don't have that kind of flexibility. I would be exceptionally nervous to go to the market and just buy what was available."

What's trending differently today is the terms, says Nancy Surphlis, managing director at OMD, which represents PepsiCo, another major TV advertiser with a big portfolio of brands. Flexibility is increasingly important as a reflection of today's business environment, she says, so OMD in recent years has been focusing on reducing or eliminating penalties for changes made during the year.

"We try to get our clients to commit to the upfront buy because we know it's going to be more efficient for them and it's the best way to get the best programming," she says. "But we recognize their business reality. They need maximum flexibility."

That same reality is causing other advertisers to think a little more short-term.

Allowing that, "you're still better off if you get in early," Lynda Cooke, managing director at PHD Canada, says that clients are increasingly wary of locking into long-term deals. "We don't see as many 52-week buys as we did a few years ago – hardly any," she says. "I don't think you save on the discounting



Global TV

Network: **Shaw Media**

Upfront date: **June 5, 2013**

Theme: **"You Won't Miss a Thing"**

Featured star/presenter:

Queen Latifah

Total # of new shows
(conventional): **18 (11 dramas,
seven comedies)**

Biggest groaner: **"Behind-the-scenes, never before seen"**

footage of *Big Brother Canada*
in which a contestant pulls a
"Mission Impossible," taking off
his "face" to reveal SVP sales
Errol Da-Re underneath, who
said how great a sales
opportunity *Big Brother* was.

Best joke: **Shaw picked up *The Millers* for Global. It stars Will Arnett, who couldn't be at the upfront, but he sent a video message explaining why: "I'm sorry I couldn't be there today... because, well...I'm a Toronto native and...(starts getting choked up)...I'm a big Leafs fan... and...(struggling to talk)...I mean...it was 4-1!! And then (starts crying, unintelligible, has to leave for a sec)..."**

Surprise! Twitter Amplify
- Danielle Ng-See-Quan

and clients just want flexibility now. So it doesn't make sense for them to lay money upfront."

Molson Coors, which works with media agency MEC, is an example of such an advertiser. "The landscape has changed," says Deborah Komlodi, head of media, Molson Coors Canada. "There are just so many more touchpoints and spaces to reach our consumers that requirements of certain high-reach, top-tier properties have minimized and clearly the

changing rapidly as consumers shift from getting most of their video media from traditional sources, to getting it from a variety of sources. To keep up, media agencies and their clients are seeking new investment opportunities and are desperate for new ways to measure audiences across mediums.

"There are more and more dollars shifting and that's a function of following the content that matters. And it's not just dollars shifting from TV, although that's what

and execution for a given advertiser."

Molson's Komlodi agrees: "The accumulation of both [traditional broadcast and non-traditional video] is clearly positive both in terms of added reach for the same spend and added message recall and likeability. We're starting to see those metrics as well."

Smelling blood in the water, digital companies have started amping up their efforts to attract advertisers to the pre-roll opportunities on their sites.



AOL hosted its second annual Newfront this spring, with original programming from celebs like Sarah Jessica Parker (pictured) and Gwyneth Paltrow.

[conventional television] upfront has become less important."

Although the upfronts still offer the most value for high-reach programming, she says, for many brands in the Molson Coors portfolio, high-reach programming isn't the panacea it once was. "Often, the demand for flexibility, which the upfronts can restrict, doesn't justify the commitment."

DIGITAL DISRUPTION

Overall, what's emerging as brands adjust their marcom to reach audiences beyond primetime hits, is that this shift is forcing media buyers to view content through a new platform-agnostic lens.

The video buying space is

everyone talks about," says Valerie McMorran, SVP investment director, Starcom MediaVest Group. "It's dollars shifting from overall media budget, some of which naturally falls from TV, but it's from other media too.

"The supply of video in our marketplace has greatly increased in the past 18 months beyond broadcast sites [to] MSN and YouTube, and a number of aggregated networks, such as BrightRoll and TubeMogul," she adds. "This is providing greater choice and scale opportunities. However, not all this video is created equal and therefore the role of video and its various offerings must be accounted for within the overall plan

The U.S. Newfronts seemed to hit their stride this year, with companies like AOL, Yahoo and Google debuting celeb-starring original shows and partnerships with major brands.

Building on the hype of traditional upfronts – capturing "the hearts and minds of the advertising community in one afternoon" – makes sense for online companies just getting in the game, says Graham Moysey, head of AOL Global Owned and Operated. His office took Canadian clients to the U.S. AOL Newfront event this spring to show off the new programming, since almost all of it was purchased with global rights and will be available in Canada. His team came away with two

sponsorship deals with BlackBerry and the confidence that there's a "real demand from the advertising [community] to see what we were doing," he says.

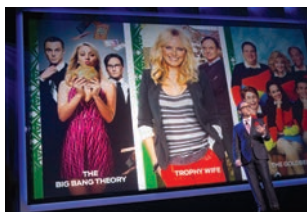
How much impact these events will have on the upfront ad market, and how and where dollars are being spent, is still unclear. Hailed by some as the start of a new era (*Forbes* contributor Steven Rosenbaum called the Newfronts "breathtaking to behold"), they seem to be equally criticized as a sideshow to the main event that lack the inventory scarcity to drive a true upfront negotiation environment. Scale too, it's argued, is still problematic when comparing original programming on a main TV network and original programming online. Moysey, unsurprisingly, disagrees.

"This is a very ripe market and you are seeing the growth catch up in ad spending," he argues, saying that he believes the scarcity argument doesn't hold water.

"I think it's a bit of a misconception that there isn't a scarcity issue with digital video – you just need to put the word 'premium' in front of the word 'video,'" he says. "It has been difficult to create premium content online because the business model wasn't there. But the changes are being driven by the consumer."

Recently, paid YouTube channels launched, and many of the companies supplying streaming entertainment to the digital media platforms are successful film and TV vets.

On the issue of investment timing, however, McMorran says the dollars dedicated to the Newfronts will likely be more ad hoc than upfront: "Dollars may not necessarily be committed upfront as they are for TV but perhaps more and more digital dollars will be carved out of the media budget [upfront] to be secured or negotiated at the right time."



CTV/CTV Two

Network: Bell Media

Upfront date: June 6, 2013

Theme: "Amazing" featuring Cirque de Soleil

Featured speaker(s): Kevin Crull, Phil King, Shemar Moore's abs

New product announcement: **Bravo Go**, a Twitter research initiative

Total # of new shows: **CTV: 10 fall, seven midseason; CTV Two: one.**

Biggest groaner: **Introducing *Masterchef Canada*:**

"We can't wait to show you what we've got cooking."

Best joke: **As *Amazing Race* host and Olympian Jon Montgomery hands Phil King a ceremonial pitcher of beer, King accepts it with a caveat: "Molson or Labatt? Only my bartender will know."**

Surprise! **Circus performers instead of corporate presenters.**

- Katie Bailey



The CBC hosted a "Canada Lives Here" exhibit timed to open to the public ahead of its upfront.

THE NEW DEAL

To try and meet advertisers in the middle – and keep video dollars in-house – broadcast media companies are expanding their wares.

"The packages have actually changed a lot," says Rita Fabian, EVP, ad sales, Bell Media. "Ten years ago, it was primarily about laying in 52-week base weight at the lowest possible rate card. And I think that's still there. We still issue our lowest rate card of the year so there's still a pricing advantage and a lot of customers lock in long-term volume at the upfronts – but really we do all kinds of different deals now."

New deals on the table at the upfronts this year included partnerships with Twitter by Bell

Media and Shaw Media. Under the stewardship of former CBC EVP of English services, Kirstine Stewart, Twitter's Amplify program launched in Canada during this year's upfronts. The service offers broadcasters the opportunity to run short clips on Twitter to complement their on-air programming, with short pre-roll for advertiser partners.

Of the new product, CTV programming president Phil King described it in his presentation as bringing a "big data approach to identifying and leveraging the relationship between audience engagement, ad effectiveness and Twitter activity." (The net also announced a new ad product, the



CBC

Upfront date: **May 22, 2013**

Programming theme:

Canada – surprise! The “Canada Lives Here” exhibit also figured largely into the presentation.

The upfront was introduced with a four-walled montage of clips featuring Canadian news, sports, scripted and unscripted shows, with astronaut Chris Hadfield providing the background music.

Featured star/presenter:

EVP English services Neil McEneaney, who’s filling in for Kirstine Stewart in the interim; Peter Mansbridge.

Total # of new shows and/or miniseries: **six**

Total # of renewals: **21**

Surprise! *Recipe to Riches*, which previously aired on Shaw Media’s

Food Network Canada

- Danielle Ng-See-Quan

Top right: Bell Media EVP, advertising sales, Rita Fabian is escorted on stage by a Cirque du Soleil performer during the media co’s upfront.

“Time Burst” media buy, on trial this summer, but on-the-record details were not available as of press time.)

Measuring audiences across platforms is currently a thorn in the side of the media community, because traditional measurement tools have not yet caught up with multi-screen viewing. With no clear answer to accurately and equally capturing audiences across mediums, and pricing them accordingly, creating a straight line between online video and broadcast video is still an open-ended question.

Starcom’s McMoran says solving the measurement quandary is critical to making multi-platform deals make sense. Agencies are looking for one CPM – a TV CPM, ideally – across broadcast and online.

“I think it’s where the industry needs to move, ensemble, in terms of a model that speaks to the content across all screens and being able to activate one execution with pricing that makes sense and really moves the needle,” she explains. “It’s where we all should be going and we need to step it up on both sides.”

UPFRONT, AHEAD

Doomsday pundits may call the end of TV near, but for now, the upfronts can sleep soundly at night knowing that demographic trends and consumer viewing habits are still largely in their favour.

MediaCom’s Neale says, “For vendors, this hype is more important now than ever before, given the pressure on budgets and choices outside the big TV companies.”

What’s unclear is whether the up-and-coming generation of viewers will adhere at all to the traditional video consumption model. Many college grads seem to have no inclination to pay anything except Netflix’s \$8 a month in addition to their internet



WE STILL ISSUE OUR LOWEST RATE CARD OF THE YEAR SO THERE’S STILL A PRICING ADVANTAGE AND A LOT OF CUSTOMERS LOCK IN LONG-TERM VOLUME AT THE UPFRONTS – BUT REALLY WE DO ALL KINDS OF DIFFERENT DEALS NOW

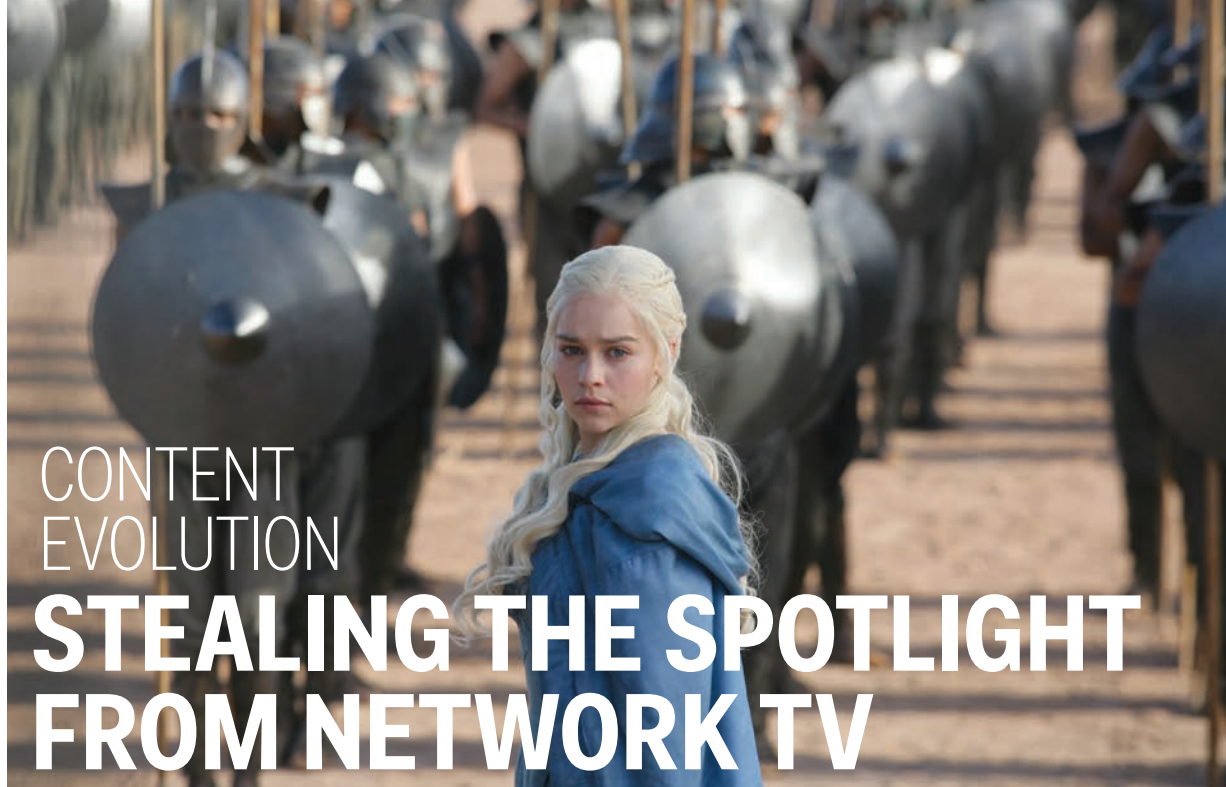
connection, and torrent sites are also an entertainment reality for youth and beyond.

But if *The Walking Dead*’s scrubby group of survivors can show us that drama is alive, well and able to pull in crazy amounts of demographically desirable “appointment” viewers, perhaps there’s hope for the bright, well-fed suits at conventional TV networks too.

Although, unlike *TWD* character

Daryl Dixon, media execs don’t get to carry crossbows into this particular battle.

Yet. ☞



CONTENT EVOLUTION STEALING THE SPOTLIGHT FROM NETWORK TV

With a lot of buzz-generating content coming from subscription-based and untraditional channels, conventional broadcasters have to fire back with a double-dose of content

BY MATTHEW CHUNG

Phil King doesn't stay up at night worrying about zombies and mythical creatures, but the president of CTV programming and sports at Bell Media certainly has the undead and other worldly events on his mind heading into the fall TV season.

Specialty channel AMC's *The Walking Dead* and subscription-based HBO's fantasy drama *Game of Thrones*' performances on Sunday nights have made King stand up and take notice.

These shows are making it cool to talk about TV again, which in turn is drawing appointment viewers keen to avoid having an episode ruined by chatter around the proverbial (virtual) water cooler.

But these shows are not on conventional channels. They appear on American stations with ads from the U.S. (AMC), or in the case of HBO and The Movie Network – which airs shows such as dramatic comedy *House of Lies* – no ads at all. That's not to mention U.S. political

drama *House of Cards*, which was praised by the press, but exclusive to Netflix's online subscribers. And even though these shows don't compete for advertising dollars with broadcasters such as CTV, they fight for eyeballs, and in some cases, their punches are landing.



"You never used to see a specialty network, outside of sports, pop into [the top 20 in BBM Canada's weekly top 30 ratings]," King says. "That's happening a little more often."

While executives for conventional channels such as Bell Media-owned CTV, Rogers Media-owned City and Shaw Media-owned Global rightfully point out that their shows are still far ahead in the overall audience

race, they are tweaking their schedules in response.

For King, that includes counter-programming against what he calls a "car crash of excellent, buzzy shows at 9 p.m. on a Sunday." (CTV moved *Law & Order: SVU* over to Sunday at 9 p.m. this fall from its Wednesday night spot on CTV Two to replace the *Mob Doctor*, which Fox cancelled last season.)

Conventional is also taking a page out of HBO and AMC's playbook with new program formatting not unfamiliar to *The Walking Dead* fans – airing several episodes split over shorter runs.

"That's what's changed in response to what seems to be where the public is going," King says. "They like these buzzy cable shows that are very complex and they are more enjoyable to watch over a shorter period of time than to try to stretch 10 episodes over 15 weeks. Now they want 10 over 10."

The Following starring Kevin Bacon (which aired on CTV last year

Above: Shows like HBO's *Game of Thrones* are claiming territory in the 9 p.m. Sunday time slot.
Right: *The Following* (starring Kevin Bacon) broke with tradition, airing only 15 consecutive episodes last season.

in the Monday 9 p.m. time slot) took this approach last season, with 15 consecutive episodes from January to April, a departure from the usual format of 22 original episodes spread over a season with repeats in between. In a first for CTV, spots promoting the drama urged viewers to set their PVRs for the show.

Viewers can expect more networks to stack original episodes together this year, says Malcolm Dunlop, executive VP, television programming at Rogers. For instance, in the U.S., ABC will air *Betrayal*, a new drama about an affair between a photographer and a lawyer, in the fall with 12 consecutive episodes, and follow that with *Resurrection*, a fantasy drama about people believed to be dead reappearing, in mid-season. City will broadcast both shows this season, but has not scheduled a slot for *Resurrection* as yet.

Dunlop says that this “doubling down” on original content is how U.S. networks are responding to what he calls “distractions” in the marketplace. “The networks are saying the only way we can compete is to have compelling programming,” he says. “That’s why they are investing so much in programming.

“When you see people like Robin Williams coming into comedies [*The Crazy Ones*, 9 p.m. on Thursdays on City] it’s incredible the people who want to do TV now,” he adds. “There used to be a stigma about television as opposed to film and now it all sort of crosses each other.”

And while conventional networks are restricted in how graphic or explicit shows can be, the U.S. networks are pushing the boundaries with shows like *The Following* featuring graphic violence.

King applauds the U.S. networks’ move away from airing re-runs. But he notes that Canadian broadcasters are in a more challenging position to fill the gaps from hit shows taking a hiatus stateside, since Canadian



House of Cards starring Kevin Spacey was Netflix's first foray into original programming.

networks may not own the same rights to limited interval series being used to cover the hiatus of a big ratings-earner like *Grey's Anatomy*. That means they may need to create an original series, as was the case with Global's *Bomb Girls* – which was intended to be a six-episode miniseries to bridge the gap between two runs of *Survivor* but found enough success to warrant a second season (though it was not renewed this year) – or they may pick up something else from the U.S.

Dunlop says Rogers also grapples with the issue of scheduling conflicts when buying shows. Some shows are too good to pass up, even if it creates a conflict with a show from a different network, he says. For instance, *Crisis* – a conspiracy drama about child abduction in Washington, D.C. – and *Resurrection* are scheduled to air in the U.S. at the same time on Sunday nights during mid-season. Rogers bought the rights to both shows and is deciding how to schedule them in Canada.

“Obviously you want to get a simulcast because you don’t want to fragment the audience, but there are certain shows you just have to buy when you see them,” says Dunlop.

This push for more original content also means new shows and miniseries will roll out over the summer months, a departure from the old strategy of taking a break when it was assumed people

were outside enjoying the weather. That allowed other channels to make inroads into mainstream TV’s audience in the first place, King says.

“Conventional TV used to lock the doors in May and say ‘we’ll see you in September,’ which then allowed people to go check out great shows on HBO, AMC and other networks,” he says. “That’s what got [those networks] going. Now they feel they can wade into the big fall season and go head-to-head, and occasionally, win that time slot.”

Barbara Williams, SVP content at Shaw Media, feels many shows getting press attention aren’t a threat to conventional TV’s dominance of the ratings. There’s always been great TV on conventional, she says, but now other platforms can make “big, beautiful, expensive TV.”

But conventional still has the biggest shows with the largest audiences, she says. She doesn’t expect that to change short-term.

“The shows that seem to be attracting a lot of attention, they are still, at this stage anyway, more buzz than actual impact to audience size,” she adds. “We know you hear a lot about *Mad Men*, *Breaking Bad* or *Girls*. We know when you actually look at the number of people watching those shows, they don’t hold a candle to good, old *NCIS*.”

TV analytics complaint line

With multiple screens, social media sharing and torrents, measuring who is viewing shows when, and how viewers are providing feedback, has never been more complex. Can the current television data measurement systems cope? And if not, what needs to change? That question was put to Shaina Boone, SVP marketing science at digital agency Critical Mass, Lauren Richards, principal at media consultancy Pollin8, and Chris Williams, president, IAB Canada, to get their feedback on the major issues with TV measurement. Then we asked measurement execs how they're responding to changing needs.

BY VAL MALONEY



COMPLAINT:

Data accuracy

"Panel-based digital box tops, portable people meters (PPMs) and usage diaries are the common forms of data collection today. These don't show what the consumer is doing around the TV and are self-selected panels, which can lead to biased results. All of these methods result in an incomplete ad-effectiveness story.

Looking forward, phone and tablet-based applications or personal sensor-based devices would be far more accurate in measuring the entire consumer experience in terms of multi-channel advertising and ad effectiveness. Platforms like Shazam, Nike+ FuelBand, Microsoft Kinect and Google Glass could all be potential vehicles to more efficiently and effectively collect this age-old data set."

– Shaina Boone, SVP marketing science, Critical Mass



RESPONSE:

"Panels for PPM aren't self-selected, they are fully balanced probability samples and are recruited in a two-step process. First, we do an establishment survey, which at any given point has about 60,000 people in it. And then every month we pull the exact households we need out of the survey to balance the panel in terms of geography, age, sex and household size. They also need to have access to radio and TV (but they don't need to actually own one).

PPM covers about 60% of the markets and then diaries fill in the smaller ones in cities like Winnipeg, Regina and Saskatoon. In almost every case, there is a regional PPM sample that overlays the diaries.

BBM Canada is rolling out a non-linear measurement extension to PPM internally in July, with functional testing by late August. It will continue to use the panel, but will start to include on-demand viewing. The challenge is that everyone watches at a different time, so you have to get the code into the program as it's being loaded onto the server. Non-linear will pick up a relatively small percentage [at first], but that will grow."

– Jim MacLeod, president, BBM Canada



COMPLAINT: Going multi-platform

"Consumers have become more platform agnostic with their media consumption – moving from device to device, often in tandem throughout their day. The television industry is still using a dated device in a handful of markets (paper diaries in most) that measures if someone has the potential to see a commercial. Viewers could very well be doing anything. And people are doing anything and everything, especially media multitasking."

– Lauren Richards, principal, Pollin8



"We can no longer afford to think in terms of television and video being two separate things. Although consumers are more platform agnostic, the metrics upon which the media space is measured and sold is very different. For years, marketers have demanded a measurement system based on commercial ratings of their specific spot, which has a direct link from the media exposure to purchase intent and can drive brand and response metrics. As an industry, we have to move towards what is possible given the data revolution."

– Chris Williams, president, IAB Canada

RESPONSES:

"I think we will need to start looking at the multiple activities people are doing while watching TV because the industry is moving that way. But we are not, by design, measuring everything people are doing at home. We measure television and radio."

Our strategic plan has us extending beyond television and radio into audio and visual regardless of the source, which is fairly broad.

Do we build something to measure non-television viewing ourselves or do we partner with other measurement companies? It is entirely possible down the road that we will have to move fairly quickly on measuring the digital and mobile space. The non-linear PPM extension has been in the works for between eight and 12 months.

The multi-screen discussion is one people have great interest in. You have seen that in social media, with Nielsen developing a product in the U.S. Twitter is obviously quite serious – they hired Kirstine Stewart to head up the Canadian office. We need to be ready to go where the industry needs us to be."

– Jim MacLeod, president, BBM Canada



"In an ideal world, we would be able to measure what the consumer is doing around the television. At this time, the only way to capture that would be on an observational basis, and it would be a cost-prohibitive undertaking."

BBM Canada is conducting a trial this fall with several Canadian broadcasters to measure Canadians' changing TV content consumption behaviours. Specifically, in addition to the existing measurement of linear television, this test will measure the non-linear components, such as video-on-demand delivered by cable and satellite providers, video streamed from broadcaster websites and video delivered by broadcasters via mobile apps. The first data from this test is targeted for early 2014."

– Theresa Treutler, president and CEO, Television Bureau of Canada

TWITTER'S TV LINK

Twitter Canada made a splash at the Canadian upfronts, with the announcement of the first deals with broadcasters north of the border. Shaw Media announced it will launch ads through Twitter Amplify, while Bell Media revealed a deal to work with the social media site to measure data and real-time metrics around campaigns airing on the media co's channels.

Kevin Crull, president of Bell Media, said social media data complements the traditional TV measurement systems in an IP world. This means that with all the big data from social and traditional TV on hand, marketers can, for example, do more targeted and dynamic ad insertions.

Crull said the market is no longer decades away from "the reality that commercials are very customized. And big data analytics are going to provide us the ability to really benefit customers."

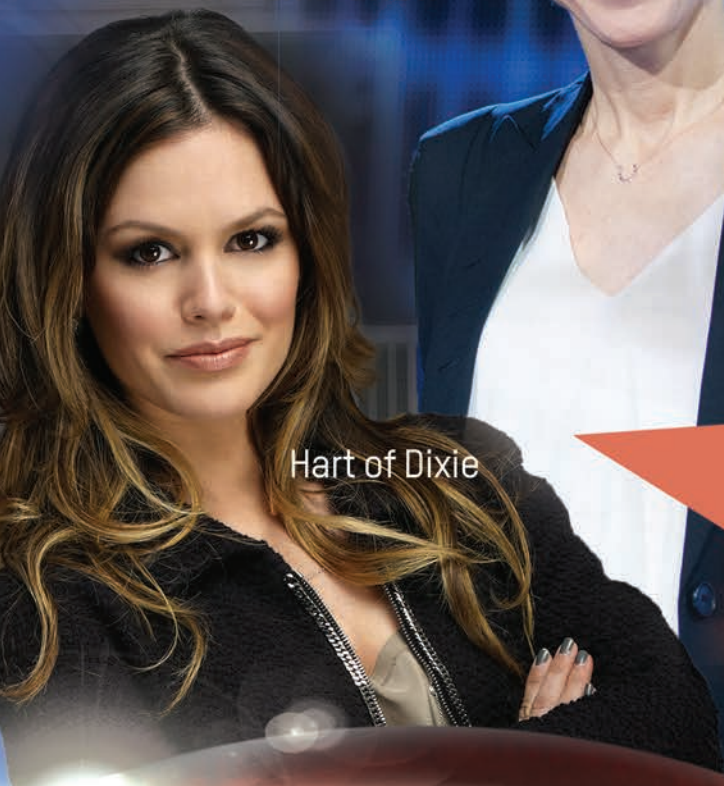
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CANADIAN NETWORKS TALK UP DAYTIME TV

BY DANIELLE NG-SEE-QUAN



The cast of CTV's new talk show *The Social*: Cynthia Loyst, Melissa Grelo, Traci Melchor and Lainey Lui.

The daytime television space is no longer a post-*Oprah* purgatory. According to Canadian network executives, the daytime viewer demographic is expanding, and a new brand of talk TV is stepping in to create social media-friendly water-cooler fodder for the wider, changing audience.

"People assume [the daytime audience] is just stay-at-home moms. That's old-fashioned thinking," says Phil King, president of programming and sports at Bell Media's CTV.

And while the primary demo is still females 25 to 54, daytime's new audience includes students, early retirees and older teens who are co-viewing with their parents in the 4 p.m. and 5 p.m. time slots, as well as a lot more men.

"There's still lots of people out there interested in watching TV in the daytime and our opportunity here is to broaden the content a little bit," says Shaw Media's SVP

content Barbara Williams.

Even after *Oprah* ended, and long-running soaps like *All My Children* and *One Life to Live* went dark, "daytime ratings are still there," ZenithOptimedia group video director Rosemary Cooper and account director Nancy Haggith wrote in an email. Talk shows make sense, they add; they're cheap to produce, encourage sharing with opinionated hosts and guests, and can reach a wider audience.

Daytime series also present more opportunities for marketers, since the changing audience is statistically more likely than ever to engage online, in addition to watching linear TV. And even with consumer habits moving towards VOD, PVR and digital viewing, daytime TV actually presents some PVR-proof opportunities for marketers to reach their audiences, says CTV's King.

"These shows have a best-before date of 24 hours. That's good because we want people to watch it as live as possible, which

they do," he argues, adding that audiences look to daytime's short, focused segments on health, lifestyle or the day's headlines to keep current. And the opportunity – through VOD and digital distribution – to play catch-up is easier than ever. "So these are becoming more valuable with the [direction] that television's going, where everyone's making up their own schedule and how they want to watch stuff," he adds.

Global and CTV beefed up their fall schedules by adding new talkers, like *The Queen Latifah Show* on Global and CTV's two new series – the nationally-syndicated *Bethenny*, and homegrown, in-house production *The Social*.

CTV's already strong lineup features *Live! With Kelly and Michael*, *Dr. Phil*, *Dr. Oz* and *The Ellen DeGeneres Show*. The network reported a 134 AMA for the A25 to 54 demo in daytime in 2012, 41% ahead of competing networks, according to national data from BBM Canada.

Global reported a 95 AMA for 2012, the same as the previous year, while CBC reported a 39 AMA and City a 52 AMA in 2012.

King says *Bethenny* is another big show with wide audience appeal that fills the hole from the cancelled *Anderson Live*, which was a good ratings performer. CTV scooped up *Bethenny* before the main buying began in L.A.

On the homegrown front, *The Social*, hosted by Lainey Lui, Melissa Grelo, Cynthia Loyst and Traci Melchor, is a prime opportunity for audience engagement and brand marketing, says King. The plan is to feature different segments focused on health, lifestyle, beauty or finances, for example, and a main driver of discussion will be through viewer check-ins on Twitter, Facebook and Instagram.

"Because it is chat-based, [*The Social*] opens up a lot of doors with respect to integration opportunities," says Bell Media's VP brand



Talk show *Bethenny*, hosted by Bethenny Frankel, is joining CTV's daytime lineup.

partnerships Mary Kreuk. She says that brands can also build a 360-reach using primetime to promote daytime.

"Integrated brand opportunities during the day allow you to reach the viewer at a time when they may be typically consuming or utilizing your product," add Cooper and Haggith.

With local productions that air five times a week, there's a shorter lead time, and more ways to integrate a brand or promote a product on a daily, weekly and monthly basis.

It's the same thinking for the CBC's newly-launched branded content initiative. The program is geared to developing shows that integrate brands, specifically for the daytime schedule. The CBC's Jennifer Dettman, interim executive director of studio and unscripted content, says the initiative makes sense to complement the pubcaster's existing schedule, while bringing marketers and producers together from a project's inception. She adds that a review committee, which involves CBC Revenue Group and Factual Entertainment execs, is currently evaluating more than 100 submissions from the production community.

Network execs agree that engaging content, whether through seamless brand integration or micro-segments focused on lifestyle, health or current affairs topics, is the top priority to draw viewers in.

"What really matters is that it's good TV. People will find good TV," says Shaw's Williams.

NETWORK EXECS GIVE THE GOODS ON DAYTIME



CBC: "Lifestyle programming with a back-to-basics approach has really worked for us. We want our shows to provide Canadians with information and content that really adds value

to their lives, but in a way that's highly entertaining and with loads of personality," says Dettman, adding a 360-experience is an important part of the content. The pubcaster's schedule is anchored by *Steven and Chris* (pictured), which is now in its seventh season and has been syndicated in the U.S., and complemented by cooking shows *Best Recipes Ever* with Kary Osmond and *In the Kitchen* with Stefano Faita.

GLOBAL: "On Global in particular we've had a lot of stability with daytime over the years...but the core of daytime for Global for the longest time has been *The Young and the Restless*. I can't overstate how valuable that property has been to us for decades now," says Shaw Media's Williams. Soaps make sense when they retain long-standing, loyal audiences, add Cooper and Haggith.

CTV: On the flip side, King says CTV's strategy to move away from soaps (it dropped *The Bold and the Beautiful* for fall) is a reflection of the fact that these days, there are lots of good soapy, serialized dramas on primetime. "That's why we want to have something on [in daytime] other than what you may PVR the night before. Watch something that's topical, live and in the now," he says.



ROGERS: Rogers Media EVP, television programming, Malcolm Dunlop says one of City's strongest brands is the in-house produced *Cityline* (pictured). He adds that the network has seen double-digit

year-over-year growth (an increase of 35%) in the A25 to 54 demo with its daytime schedule, which includes long-running shows like *The Price is Right*, *Let's Make a Deal* and *General Hospital*. "Successful [game shows] have history - these seem to appeal to both seniors that remember the original, and the college crowd," say ZenithOptimedia's Haggith and Cooper.

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THE NEXT BIG THING IN SPECIALTY

BY MEGAN HAYNES & JORDAN TWISS

Once relegated to cheap and cheerful magazine formats, repeats and reality, specialty TV is stepping up with a host of new scripted (and of course, more reality) series – both locally produced and globally procured – to create alluring lineups with a higher-end feel. Here's the expected hits and momentum-builders for the new TV viewing season.

THE HOST(ESSE)S WITH THE MOST(ESS)

LOVING THE LOVE IT OR LIST IT HOSTS



Six seasons into *Love it or List it*, the Corus show on W recently branched out into *Love it or List it Vancouver*, with rumours of a Los Angeles version swirling around. Each episode follows a homeowner as they decide whether they should stay in their home after help from a designer, or move with the

help from a realtor. While all of the hosts seem to have solid chemistry and loyal followings, Vancouver's host Jillian Harris is poised to be the next big star. The Alberta-born interior designer got her first claim to fame on the fifth season of the U.S. show *The Bachelorette*. Since taking the helm of the Vancouver iteration of *Love it or List it*, alongside co-host Todd Talbot, Harris has worked with Corus and online retailer eLuxe to curate her outfits on the show and sell them online, which she helps promote to her 117,000+ Twitter followers and on her blog.

THE NEXT IMPORTED HOST



American comedian Chris Hardwick has replaced Ryan Seacrest as the hardest working man on TV, at least in the opinion of Rachel Goldstein-Couto, director of specialty programming channels, Bell Media. She points to his three current hosting gigs as to why this is his year: *The Nerdist* (BBC America), *Talking Dead* (AMC), and a yet-to-be-named post-*Colbert Report* talk show (Comedy Central), not to mention multiple acting and voice-over

roles. Oh, and he runs a theatre in Los Angeles.

Her reasoning on why he'll be the NBT? Millennials look up to comedians the way Gen Xers would musicians. "Comedians are the rock stars of now," she says.

The original: Before Seacrest and Hardwick, there was Dick Clark. Best known for *Dick Clark's New Year's Rockin' Eve*, he got his start doing weather on the radio under the name Dick Clay.

FOODIE-ACTOR GETS HIS OWN COOKING SHOW

With the Food Network preparing to serve up *Chopped Canada*, its own helping of the U.S. culinary competition property *Chopped*, Barbara Williams, SVP content, Shaw Media, is expecting big things, much like the success the channel had with adaptations like *Top Chef Canada*. *Chopped Canada* pits four amateur chefs against each other as they use mystery ingredients to wow judges.

She also sees big things for Canadian-American actor Dean McDermott, who's been tapped to host the new series. While perhaps an unlikely choice, the self-confessed foodie is no stranger to the kitchen. McDermott was most recently seen on season two of the Food Network's *Rachael vs. Guy: Celebrity Cook-Off*, featuring Rachael Ray and Guy Fieri, where he was crowned the winner. Since then, he's devoted himself to cooking and even enrolled in culinary school.

Viewers can also expect to see more of Lynn Crawford (Williams' celebrity chef hot pick from last year), who will act as one of eight rotating judges for the series.

Head to Strategyonline.ca to check out McDermott's favourite recipe: Twisted Twinkie Creamsicle Milkshake.



THE RESURGENCE OF SCRIPTED TV

THE NEXT 'IT CAME FROM CANADA' HIT



Space's *Orphan Black*, produced by Bell and Temple Street Productions and distributed by BBC Worldwide, follows the title character, Sarah Manning, played by Tatiana Maslany, as she discovers clones of herself across the world after assuming the identity of one of the clones.

The series, entering its second short-run season of 10 episodes, also plays in the U.S.

Assuming identities: According to IMDB, the 2000 Christopher Nolan flick, *Memento*, which tells the story of a man with amnesia using notes and tattoos to find a killer, offered up inspiration for the show.

on BBC America and has been picked up by BBC Three in the U.K., while star Maslany has earned a Critics' Choice TV Award, winning the prize over big-name nominees like Claire Danes, Vera Farmiga and Elisabeth Moss.

Catherine MacLeod, VP, specialty channels, Bell Media says it was the most viewed premiere of a BBC America show ever, and she expects momentum to continue to build over the summer months as people find time to catch up on hyped TV shows.



CINEMATIC BLOCKBUSTERS HIT THE SMALL SCREEN

"Drama is making noise," says Bell's Goldstein-Couto of this year's seemingly cinematic lineup. She points to *The Last Ship*, starring ex-*Grey's Anatomy* star Eric Dane and produced by blockbuster maker Michael Bay, as a prime example. The Space series follows a crew aboard a warship as they race to cure humanity of a deadly plague.

Politically updated thrillers: *The Last Ship* is based on a 1988 book of the same name, written by William Brinkley. To modernize the tale, a nuclear winter was swapped out with a pandemic, playing on people's more updated doomsday fears.

The Last Ship is joined by series *Klondike* on Discovery, helmed by *Alien* director Ridley Scott, which is a scripted miniseries that follows six strangers in a small frontier town in the Yukon during the gold rush.

Astral's Kevin Wright, SVP programming, says upcoming The Movie Network show *Ray Donovan*, starring big names like Liev Schreiber and Jon Voight, will be one to watch. Produced by Showtime in the U.S., the series follows Schreiber in the lead role as he cleans up the messes of the rich and famous in L.A.

"It used to be that film was one thing and TV was another. TV was the poor cousin," says Bell's MacLeod. "Now, television has eclipsed that, so you're getting the talent coming in on both the actor and producer sides."

NOW TRENDING: ROYALTY SHOWS

Maybe it's Princess Kate's baby bump. Maybe it's the building *Game of Thrones* obsession. Maybe people just want to be king. Whatever it is, there's a growing trend towards royally-themed shows.

On Disney Kids, *Sofia the First* (pictured below), which follows a regular-girl-turned princess, is striking a chord with two- to five-year-olds, quickly picking up a second season, while the CW ordered *Reign* (airing here on Much and CTV Two), which follows the life of Mary Queen of Scots. Bravo reality show, *Princesses: Long Island*, doesn't follow actual royalty; rather it stars six girls who chose to live with their parents well into their 30s, and are doted upon.



REIGNING SUPREME

Astral's Wright says that *Game of Thrones*, the über-popular book series turned super-popular HBO series, is just hitting its stride. The medieval fantasy show follows the struggles of nobility in an era where seasons last for decades, and magic and dragons are

The book-to-TV format is popular. TV shows based on books currently on air include: *The Vampire Diaries*, *Pretty Little Liars*, *Bones*, *True Blood*, *Sherlock*, *Dexter* and *Elementary*. New series include CW's *Ravenwood* and Space's *Bitten* (which follows a female werewolf, because lycanthropes are the new vampires).

commonplace. With the summer months coming up, he expects lots of folk to catch up on the much-hyped series and for it to continue to bring in higher audience numbers, which have more than doubled since the first season.



REALITY ROUNDUP

U.K. ADAPTATION BUILDS AUDIENCES

Between funding through Kickstarter and Indiegogo, and Twitter and Facebook-sourcing, tapping the masses is all the rage. Adapted from the U.K. hit of the same name, W's upcoming *The Audience* (pictured right) wants to crowdsource advice for those struggling with dilemmas. Targeting 25- to 50-year-old women, the series by Force Four Entertainment gathers a 50-strong "audience" to follow a person around for a week and later offer advice on how to deal with a specific issue. It'll be the relatable and emotional nature of the problems that will help the show succeed, says John MacDonald, VP, head of programming and production, Corus.

"You're going to see some tears in this show."

Audiences are as old as theatre itself, which began in tribal times as a participatory type of entertainment. Performers would be joined by audience members, who all believed their lives depended on a successful show. Some things never change.



TRANSGENDER REALITY

After garnering international attention for taking on Donald Trump, Vancouver-based Jenna Talackova (born Walter) stars in new reality show *Brave New Girl* by Peacock Alley Entertainment. The series follows Talackova, who in 2012 was disqualified from competing in the Miss Universe Pageant for being transgendered, but later won the right to compete after threatening to take the pageant and its owner, Trump, to court. *BNG* is filming now and is set to air on Bell's E! in the winter. "She's a 23-year-old star and she's got that heart," says Bell's Goldstein-Couto. "It's a lot to go through at a very young age and I think people are going to respond to that in her."

TIME FOR A CANADIAN SPIN?

Trump's best known media property *The Apprentice* has spawned multiple spin-offs (including a short-lived Martha Stewart version and a dating show, *The Ultimate Merger*) and a number of international versions (popular among Commonwealth countries, including the U.K., Australia and New Zealand). Is it time the long-running series venture up north? (*The Bachelor* did it after 10 years.) We propose Galen Weston Jr., executive chairman of Loblaw, as host (befitting our reputation as the nicer half of North America).

TARGETED DEMOGRAPHICS



NEXT FOR MEN

Season one of the Canada-Ireland co-production *Vikings* (pictured at top) was a record-setting hit for History, with a premiere that netted 1.1 million viewers. The series follows the adventures of Norse warrior Ragnar Lothbrok as he rises to fame and glory. Shaw's Williams says that while it skewed male, the show also delivered a solid female audience.

She also predicts that *Bonnie and Clyde: Dead and Alive*, an American import, will be History's next big hit for men. The four-part miniseries stars Emile Hirsch and Holliday Grainger as the depression-era outlaw couple and follows their exploits from the moment they meet through their infamous bank robbing spree.

Like *Vikings*, Williams predicts *Bonnie and Clyde* will find a female audience on Lifetime, where it will be simulcast.



KIDS SHOWS GET ARTSY

It's all about the arts with kids these days – at least that's how it seems. On Teletoon, a new animated series, *Grojband* (pictured bottom left), which targets eight- to 14-year-olds, follows a boy who steals his sister's diary to come up with song lyrics for his garage band. The comedy fills a musical-cartoon void that has been left empty since *The Archie Show*, which went off air in the '80s, says Teletoon's John Rooney, director of programming. It jumps on the music-themed trend as shows like *Glee*, *American Idol* and *The Voice* are demonstrating their staying power. The Teletoon- and FremantleMedia-produced series has already been picked up by Comedy Central in the States, Rooney adds.

Joe Tedesco, SVP general manager, Astral Kids, says Family Channel's *The Next Step* (pictured at top), which heads into its second season in the fall, was the channel's biggest premiere ever. The serialized show (shot in a mockumentary format) follows a troupe of dancers as they strive to win competitions. Produced by Temple Street Productions, it skews toward tween girls aged eight to 14, and has already been picked up for a third season.

Finally, Corus-owned YTV's *The Next Star*, a singing competition, is entering its sixth season and is poised to have a new spin, bowing in March 2014, says Corus' MacDonald, though he remains mum on the change coming down the pipes. Produced by Tricon Films, the show follows singers under the age of 15 as they face weekly challenges, eventually crowning a winner through viewer voting, and continues to be a big draw among six- to 11-year-olds, MacDonald says.



NOW TRENDING: RANDOMNESS

The idea of seeing something that can't be seen elsewhere appeals to youth right now, says Teletoon's Rooney. For instance, *The Annoying Orange* (pictured), follows animated fruit superimposed with real mouths and eyes and is a "gag-a-minute show," he says.

On Disney Kids, Astral is introducing between-video shorts called *Yup Yups*, aimed at the under-five set, which follow a group of animated characters whose sole form of communication is through body transformations.

On Corus, bizarre comes in the form of *Japinizi*, which localizes Japanese-style game shows by having kids compete in physical-gag-style competitions. The show, by Marblemedia for YTV, has already been picked up by Disney Channels in Europe, the Middle East, Africa and parts of Asia.

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Primetime battlegrounds 2013

Rogers Media is going younger and lighter on City by beefing up its roster of new comedies, Bell Media has moved the majority of its reality programming to CTV Two to give the channel a brand identity, and Shaw Media continues to try to own the 10 p.m. drama block on Global. But what new shows will stick and which will be cancelled faster than you can say *Animal Practice*? Don't fear, help is here in the form of picks and pans from the upcoming slate of new programs.

BY VAL MALONEY

MONDAY

"If NBC's 10 p.m. time slot was enough to keep *Revolution* around last year, *The Blacklist* will be an even bigger success."

— Bailey Wilson, director of investment, J3



City is kicking off the week with its laugh-heavy strategy, putting new Canadian comedy *Package Deal*, which is based on three dysfunctionally close brothers and the woman who comes between them, at 8:30 p.m. ahead of the third season of *2 Broke Girls* at 9 p.m., which leads into Chuck Lorre's new Anna Faris-starring show *Mom* at 9:30 p.m. (pictured above, right) about a newly-sober alcoholic who moves home to Napa Valley. Rebecca Carter, broadcast buyer at Maxus Canada, calls the new show from the creator of *Two and a Half Men* "quirky," but adds it is one she thinks will appeal to the whole family.

Global Television's first new drama for Monday night, *Sleepy Hollow* (pictured above, left) at 9 p.m. is a miss according to Bailey Wilson, director of investment at J3, and Lina Alles, managing partner at Mindshare, who says the new show – based on Washington Irving's classic story of Ichabod Crane told in the present day – "doesn't stand a chance" against *The Voice* on CTV and *Dancing with the Stars* on CTV Two.

The battle of the new dramas heats up at 10 p.m., with CTV debuting new Dylan McDermott-starring FBI thriller *Hostages*, about a rogue agent who takes a surgeon (Toni Collette) and her family hostage, against the James Spader-topping crime drama *The Blacklist* on Global. In *The Blacklist*, Spader stars as an FBI fugitive who surrenders to the organization on the condition that he will only speak to one agent. Both are picked as hits by *strategy*'s commenters, but Alles says pitting the two dramas against each other as well as returning hit *Castle* on CTV Two will "split the female audience."



"*Hostages* has great pedigree with Jerry Bruckheimer, and this show provides good competition for *Blacklist* which I also think is going to stick around even though both of these are running at the same time on Mondays."

— Atreyee Dey, group director, PHD



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TUESDAY

“With the powerhouse of Joss Whedon and *The Avengers* behind it, it should come as no surprise that *Marvel’s Agents of S.H.I.E.L.D.* has lots of buzz. Those who don’t watch CBS’s number one show *NCIS*, which is the time period’s only real competition, will definitely tune in to *S.H.I.E.L.D.*”

– Wilson



“Even though *Brooklyn Nine-Nine* stars Andy Samberg, it could have a difficult time surviving. Honestly, how many times can you watch [what seems like] an *SNL* skit that’s been way overplayed?”

– Rebecca Carter, broadcast buyer, Maxus Canada



CTV and City have three new series on Tuesday night. CTV leads off with the most buzzed-about new show of the season, *Marvel’s Agents of S.H.I.E.L.D.* on the Bell Media channel at 8 p.m., and City leads off with Seth MacFarlane’s new comedy *Dads* (pictured above, left) followed by a second laughter, *Brooklyn Nine-Nine* at 8:30 about a laid back cop (*SNL*’s Andy Samberg) and his tight-laced boss. CTV Two will air *Anger Management* and *Hot in Cleveland*.

Wilson’s favourite of the new shows, ’80s-based family comedy *The Goldbergs* (pictured above, right) gets the *Marvel* lead-in at 9 p.m., with the broadcaster’s third new comedy of the night, *Trophy Wife*, about a younger woman who marries an older man with kids, airing at 9:30 p.m.

“The cast is great and the trailer was hilarious and heart-warming,” she says of *The Goldbergs*. “Good thing it has *S.H.I.E.L.D.* as its lead-in, but it is in a tough time slot against the results show of *The Voice* [CTV Two], *NCIS: Los Angeles* [Global] and *New Girl* [City].”

City’s 10 p.m. debut, drama *Lucky 7* about a group of gas station employees who win the lottery, the only new show in the time slot, won’t stay on the air, according to Dey.

“The storyline of that show is weak and I am not sure how many episodes it can sustain to profile the lives of lottery winners,” she says.



- ▲ “With executive producer Conan O’Brien and rising star Rebel Wilson, *Super Fun Night* will fill our nights with laughter. Also written by Wilson, the show is fast-paced with little room for a break from laughter.”

– Carter



- ▲ “The sitcom *Sean Saves the World* was full of slapstick humour and the jokes were predictable and eye-roll worthy. But in a world where shows like *Happy Endings* get cancelled, maybe I’ll be wrong and this is the type of humour Americans are looking for.”

– Wilson

City and Global are the only networks introducing new shows to the Wednesday lineup, with the Sean Hayes (*Will and Grace*)-starring comedy *Sean Saves the World* about a divorced dad trying to figure out his new life on Global at 9 p.m. It is up against hit show *Modern Family* on City, *Criminal Minds* on CTV and *The X Factor* on CTV Two.



Our panel is split on Michael J. Fox’s return to TV on *The Michael J. Fox Show* (pictured), based loosely on Fox’s real-life struggles with Parkinson’s through his character as a TV newsman, which Global is airing at 9:30 p.m. against Conan O’Brien-produced new laughter *Super Fun Night* on City, starring Rebel Wilson (*Pitch Perfect*, *Bridesmaids*) as one of three friends on a quest to have fun every Friday night.

“While his brief appearances on *The Good Wife* were well received, the laughs seem to float around his diagnosed condition of Parkinson’s and how his life goes on after this. I feel this is going to fall flat after a few episodes,” says Dey on Fox’s new show.

Wilson disagrees, saying that if the show hadn’t already been picked up for a full season (it has been), then she would give it the green light.

“The trailer was witty, original and refreshing, and everyone loves Michael J. Fox,” she says.

Global also introduces a reboot of classic police drama *Ironside*, this time starring Blair Underwood, at 10 p.m. against *CSI* on CTV, *Nashville*, which is now on City, and repeats of *Mike & Molly* and *Hot in Cleveland* that run during that hour from Tuesday to Sunday on CTV Two.



▲ “Robin Williams is just known for being Robin Williams and everyone knows he is crazy – so the title of the show is appropriate. From what I’ve seen of *The Crazy Ones*, and I have only seen the clips, it looks like it’s Robin Williams playing Robin Williams, which will not sustain long-term appeal. If viewers want to see Robin Williams doing comedy they can watch one of his many stand-up DVDs. I think for this show to engage an audience (especially up against *Grey’s Anatomy*), it needs to be more than just the Robin Williams Show.”

– Alles



▲ “I don’t think CTV Two’s period piece *Reign* about Mary, Queen of Scots will do well up against *Glee*. It’s a CW show, so it will be going after the same younger audience and *Glee* will win.”

– Wilson



There are six new shows on the Canadian dial for Thursday night, with City leading off with *Once Upon a Time* (which airs Sunday nights on CTV) spinoff, *Once Upon a Time in Wonderland* (pictured above), based on *Alice in Wonderland* and starring John Lithgow as the White Rabbit, at 8 p.m. The show is up against Global’s new comedy, *Welcome to the Family*, about two families of different cultures thrown together by an accidental pregnancy, ratings killer *The Big Bang Theory* on CTV (the show averaged 4.1 million viewers last season, according to BBM Canada numbers) and *The X Factor* on CTV Two.

Carter thinks there is only room for one *Once Upon a Time* show on the dial, and it isn’t this spinoff: “It requires quite a mental and time commitment to keep up, which not many can make. Once you lose traction, it is hard to jump back into it.”

Up at 9 p.m. on City is the much buzzed-about Robin Williams return to TV with Sarah Michelle Gellar in *The Crazy Ones*, a comedy that has Williams as the head of a large ad agency, up against long-running fan favourites *Grey’s Anatomy* on CTV, *Glee* on Global and a new female-targeted royal drama about Mary, Queen of Scots (it has been called the female *Game of Thrones* meets *Marie Antoinette*) *Reign* on CTV Two. Carter says *Grey’s* will take the time slot because of its long-time big fan following.

Up at 10 p.m. is new CTV original undercover police drama *Played* starring Vincent Walsh (*Deception*, *Lost Girl*) against the second season of *Elementary* on Global and political drama *Scandal* on City.

FRIDAY



- ▲ “*Dracula* is gorgeous – I personally think it looks great (but that might be attributed to Jonathan Rhys Meyers alone). If there is an audience for *Dracula*, Friday nights is the right place to look for it.”
- Wilson



- ▲ “I am a little unsure about *Enlisted* because it seems a little too American for Canadians.”
- Carter

The 8 p.m. time slot is a fight for family viewing on Friday night, with CTV launching *Junior MasterChef* against returning shows *The Carrie Diaries* on City, *Parenthood* on Global and *Undercover Boss* on CTV Two.

Also new for the night is military comedy *Enlisted* on City at 9:30 p.m. about three very different brothers all located at the same Florida military base, against one of Global's top dramas, *Hawaii Five-O*, *Grimm* on CTV and *Shark Tank* on CTV Two. Carter is betting on the returning *Hawaii Five-O* continuing to do well as it did when it had *House* as a lead-in.

One of Shaw's new dramas, the Jonathan Rhys Meyers-starring period piece *Dracula*, is in the 10 p.m. slot. The show takes on the fourth season of *Blue Bloods* on CTV, and OLN series about buying and selling, *The Liquidator*, on City. Wilson says *Dracula* will do better in the U.S., where it has *Grimm* as its lead-in, but might earn enough viewers to have its 10 ordered episodes make it to air.

Susan Courtney, Vice President of QMI National Sales, is pleased to introduce **Jerome Leys**, Senior Director of Broadcast Solutions & Quebec Market. Jerome is responsible for guiding strategic broadcast sales efforts and ensuring multi-brand, turnkey delivery in the Quebec market.

Jerome came to Quebecor Media with a long career at Radio-Canada Television, prior to which, he was Director of Multi-Platform Sales and was responsible for French broadcast and online sales activities for Toronto, Western Canada and the U.S. – a well-respected media leader with over 15 years of experience in broadcast sales, and a wealth of knowledge specific to the Quebec marketplace.

Jerome is responsible for working in collaboration with our Media Creativity teams in both Montreal and Toronto, with dedicated Quebec integration.

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Jerome Leys
Senior Director,
Broadcast Solutions
& Quebec Market
t: 416.947.2319
jerome.leys@qmisaes.ca

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SATURDAY



The one night of the week when CBC is guaranteed to own the schedule with *Hockey Night in Canada*, most networks haven't made any big changes to their Saturday night lineups.

Global has introduced new, original factual programming to the night with *Obsessions*, a documentary series about people whose lives are ruled by their personal obsessions, at 8 p.m., followed by its slate of re-run crime shows *Crime Time* at 9 p.m. *Walk the Walk*, another new, original series that introduces Canadians to their personal heroes, bows at 10 p.m.



SEPTEMBER 19TH / THE KOOL HAUS / TORONTO

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- ▲ “*Betrayal* has all the makings of a great drama: marital affair, deceit, chemistry, political aspirations and ambitious prosecutors on opposite sides of a high profile murder trial. It has the potential to capture the female audience who has just tuned in to *Revenge*, especially because its only competition is *The Good Wife*.”

– Alles



- ▲ “*We are Men* is about four newly single guys who are unlucky in love and total losers. It will be one of the first shows to be cancelled (let’s hope).”

– Alles

Leading Global’s Sunday schedule is the new Tony Shalhoub and Jerry O’Connell comedy *We are Men* at 7:30 p.m., which is a pass according to our panellists.

“This just won’t make it past a few episodes as the clips shown at the upfront drew very few laughs,” says Dey.

Global’s Sunday night continues with its slate of adult cartoons followed by its hit drama *The Good Wife* returning at 10 p.m., airing against new shows on City including the introduction of *Storage Wars Canada* at 8 p.m., the Canadian version of U.K import *Meet the Family* at 8:30 p.m., the returning *Revenge* at 9 p.m. and a new infidelity-heavy drama about a photographer and her affair with a lawyer, *Betrayal* at 10 p.m.

THE SOCIAL HITS

Social media listening company Networked Insights tracked the upfronts to find the shows with the most social engagement and the ones people are looking forward to least. Numbers are based on the volume of posts about the show, positive or negative sentiment around it, the acceleration of conversation and thematic analysis, such as whether one actor from the show was being singled out in discussion.

THE MOST BUZZED-ABOUT NEW SERIES

1. *Marvel’s Agents of S.H.I.E.L.D.*
2. *The Blacklist*
3. *The Crazy Ones*
4. *Almost Human* (mid-season on Global)
5. *The Michael J. Fox Show*

THE LEAST-ANTICIPATED NEW SHOWS

1. *Ironside*
2. *Sean Saves the World*
3. *Enlisted*
4. *Surviving Jack* (mid-season on CTV)

AMAZING

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HOSTAGES



THE GOLDBERGS



MARVEL'S AGENTS OF S.H.I.E.L.D.

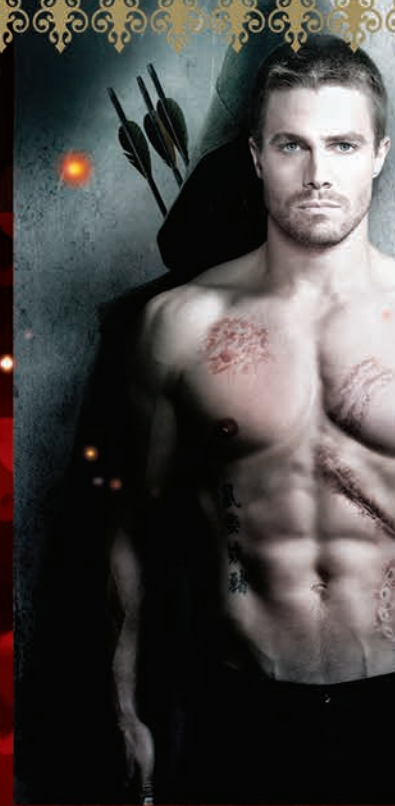


PLAYED

THE AMAZING RACE



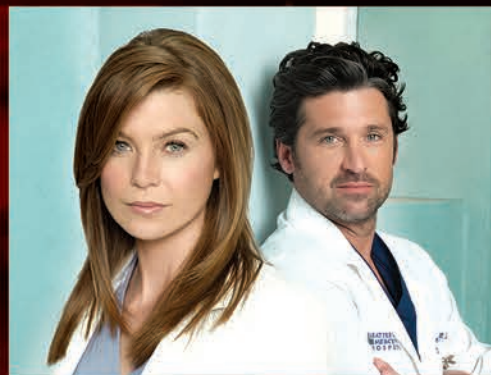
THE VOICE



ARROW



THE BIG BANG THEORY



GREY'S ANATOMY



SUPER BOWL



ACADEMY AWARDS®



GOLDEN GLOBE AWARDS®



THE NATIONAL* FALL TV SCHEDULE 2013

Mon.	8:00	8:30	9:00	9:30	10:00	10:30
CBC	Murdoch Mysteries		Cracked		The National	
City	How I Met your Mother	Package Deal	2 Broke Girls	Mom	The Project – Guatemala	
CTV	The Voice				Hostages	
CTV Two	Dancing with the Stars				Castle	
Global	Bones/Almost Human (November)		Sleepy Hollow		The Blacklist	
Tues.	8:00	8:30	9:00	9:30	10:00	10:30
CBC	Rick Mercer Report	This Hour has 22 Minutes	Crossing Lines		The National	
City	Dads	Brooklyn Nine-Nine	New Girl	The Mindy Project	Lucky 7	
CTV	Marvel's Agents of S.H.I.E.L.D.		The Goldbergs	Trophy Wife	Person of Interest	
CTV Two	Anger Management	Hot in Cleveland	The Voice		Mike & Molly	Hot in Cleveland
Global	NCIS		NCIS: LA		Chicago Fire	
Wed.	8:00	8:30	9:00	9:30	10:00	10:30
CBC	Dragons' Den		Republic of Doyle		The National	
City	Revolution		Modern Family	Super Fun Night	Nashville	
CTV	Arrow		Criminal Minds		CSI	
CTV Two	The X Factor				Mike & Molly	Hot in Cleveland
Global	Survivor		Sean Saves the World	The Michael J. Fox Show	Ironside	
Thurs.	8:00	8:30	9:00	9:30	10:00	10:30
CBC	The Nature of Things		Doc Zone		The National	

City	Once Upon a Time in Wonderland		The Crazy Ones		Parks and Recreation	Scandal
CTV	The Big Bang Theory	Two and a Half Men	Grey's Anatomy			Played
CTV Two	The X Factor		Reign		Mike & Molly	Hot in Cleveland
Global	Welcome to the Family	The Millers	Glee		Elementary	
Fri.	8:00	8:30	9:00	9:30	10:00	10:30
CBC	Marketplace	Rick Mercer Report (encore)	The Fifth Estate		The National	
City	The Carrie Diaries		Raising Hope	Enlisted	The Liquidator	The Liquidator
CTV	Junior MasterChef		Grimm		Blue Bloods	
CTV Two	Undercover Boss		Shark Tank		Mike & Molly	Hot in Cleveland
Global	Parenthood		Hawaii Five-0		Dracula	
Sat.	8:00	8:30	9:00	9:30	10:00	10:30
CBC	Hockey Night in Canada (Game 1)				Hockey Night in Canada (Game 2)	
City	The Project – Guatemala (encore)		Great Canadian Movies			
CTV	Comedy Night on CTV				Crime Time	
CTV Two	CTV Movie		W5		Mike & Molly	Hot in Cleveland
Global	Obsessions		Crime Time		Walk the Walk	
Sun.	8:00	8:30	9:00	9:30	10:00	10:30
CBC	Battle of the Blades		Dragons' Den (encore)		The National	
City	Storage Wars Canada	Meet the Family	Revenge		Betrayal	
CTV	The Amazing Race		Law & Order: SVU		The Mentalist	
CTV Two	The Vampire Diaries		Castle		Mike & Molly	Hot in Cleveland
Global	The Simpsons	Bob's Burgers	Family Guy		American Dad	The Good Wife

*Note: The grid covers the national networks' schedules based on Toronto timetables (ET). Regional times for networks such as City will vary. All information is tentative and subject to change. Red indicates new programs.

HELLMANN'S

100 YEARS OF KEEPING IT REAL

BY MEGAN HAYNES

How the brand stayed true to its positioning through a century of change



Left to right: Richard Hellmann with one of his delivery turcks; don't be fooled, that's no cake but a Hellmann's-based potato salad; this TV spot from 2000 is mind-bending.

Richard Hellmann wasn't the inventor of mayonnaise. That honour goes to folks in a French town in the 1700s. Nor was he the first person to successfully bottle and mass produce the product in the United States. Amelia Schlorer of Philadelphia gets that title.

Hellmann is, however, the name behind the most successful mayonnaise in North America, going on to sell more than \$1.8 billion worth in the U.S. alone, where it maintains a 31.1% share. The brand, introduced in Canada in the 1950s, is sitting pretty atop a 52% market share today, almost doubling its sales in the past 12 years.

This year, the Unilever brand enjoys its 100th anniversary – working with Toronto-based creative agency Ogilvy, PR firm Harbinger and media agencies Mindshare and PHD – with a social and PR campaign that celebrates the birthday and updates some classic recipes by adding a healthier twist

(for example, Caesar salad with spinach, instead of romaine lettuce). It's been a busy century for the mayonnaise, including a brief scuffle with the Canadian government during its consumer protectionist phase, a dip into comedy and a head-first jump into the healthy food movement.

While it competes against dressings and “mayonnaise-like” products, Hellmann's is the most popular “real” mayo – a claim it held dear throughout its lengthy history and that serves it well today.

1913-1920

Richard Hellmann was born in Vetschau, Germany and immigrated to New York in 1905, where he married into his wife's family business, a delicatessen. After a near run-in with death (the couple almost travelled aboard the Titanic) in 1913, Hellmann and his wife introduced two flavours of mayonnaise. To help folks know the difference, Hellmann's wife put

a blue ribbon around her favourite flavour, says Jennifer Pyne, account director at Harbinger, giving the mayo its iconic blue ribbon logo it maintains today.

The product proved so popular that in 1917, Hellmann closed the shop to dedicate his time to selling his mayo, buying a fleet of trucks to deliver straight to consumers and opening a manufacturing plant. Despite the distribution push, advertising was almost non-existent.

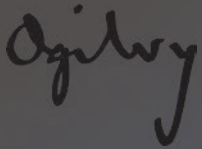
1920-1945

In the 1920s, General Foods bought Hellmann's and gave the brand its rectangular logo. Though actual blue ribbons were no longer used, the product still bore the symbol.

Food marketers had a tough sell over the next 25 years. Between the Depression and the Second World War, it was an age of austerity, and many women were skeptical about buying products they could make at home, such as soup, butter, and of course, mayonnaise.



THANK YOU TO OUR AGENCIES FOR HELPING
MAKE US A **REAL** SUCCESS



In her book, *Food Is Love: Advertising and Gender Roles in Modern America*, Katherine Parkin found (unsurprisingly) that ads at the time reinforced the idea that a woman's place was in the home, and food ads rarely deviated from this view. A woman's validation came from her family's appreciation of her food. Perfection at meal time was a must. To convince women to buy a product she formerly made herself, ads focused on it being a "smart choice" to buy packaged food, because it would enhance or perfect a meal.


For example, one 1930s Campbell's ad declared that women were "Soup Wise" using the product, while a Crisco ad proclaimed that the brand did the work for the woman so she could concentrate on making the best food. Advertising was designed to assure her she wouldn't be letting her family down when using packaged foods.

Print and radio, which debuted in 1923, were the primary media for ads, with packaged food folks preferring the picturesque pages of magazines to show off delectable meals and product instructions.

It wasn't until the 1930s, when purchased by food co Best Foods, that Hellmann's began any major advertising, focusing largely on magazines such as cooking pub *Correct Salads For All Occasions*, which often contained recipe cards to show women how to integrate Hellmann's into cooking. Much like other prosaic food advertisements of the time, copy focused on the quality of the product and the benefit of using the "whole egg," and highlighted the multiple uses of mayo ("Thin it, vary it, cook with it, serve... Hellmann's as is" read one ad. "Use it on sandwiches, salads and in sauces," read another).


Its main competitor, Miracle Whip, was introduced in 1933 at the Century of Progress Exposition

This is no place for "second-best..."



this is the place for HELLMANN'S
(It's real whole-egg mayonnaise!)

- ☆ Hellmann's® spreads creamy, rich and smooth
- ☆ Keeps sandwiches fresh-tasting longer
- ☆ Enhances even the most delicate food flavors



Don't be a slouch on the beach, this 1960s ad implies. Make sure to bring the full chicken to feed your family.

in Chicago, as a cheaper alternative to mayo during the Depression era. It was a blend of mayonnaise products and used powdered eggs instead of real ones. To this day, Miracle Whip is a "dressing" and not a mayonnaise, says Alison Leung, marketing director, foods, Unilever, because it doesn't meet the standard of identity of mayo (which must contain eggs, vinegar and olive oil).

As the products entered a two-horse race, capturing nearly all the market share between them, Hellmann's found itself increasingly reliant on its claim to "real" as a distinguishing factor, brand promise and identity. Without meaning to, the introduction of Miracle Whip may have given

Hellmann's its strongest positioning possible, and one that it retained through the next 80 years.

1945-1970

An age of rapid consumerism followed the Second World War, with suburbs and mass market retailers flourishing. As people moved out of the cities into prefab communities, hosting dinner parties came into style, with books like *Entertaining is Fun* recommending extreme measures – like a freshly painted front door – for parties in order to "keep up with the Joneses."

Through the '50s and '60s more women began working outside the home, incomes increased and there was less time to cook meals.

Capitalizing on this, fast food chains proliferated: McDonald's opened its first franchise in 1953, Burger King followed in 1954, while Tim Hortons launched in 1964. Reflecting a more sophisticated and informed society, creative, on the whole, became more brazen and risky, with companies introducing self-deprecating humour (such as Volkswagen's "Lemon" and "Think Small" ads) and social issues (Lever and Gillette both introduced African Americans into their ads).

But despite a shift in attitudes and increased competition from fast food chains, food advertising remained relatively staid, Parkin found. Ads continued to focus on a woman's place in the home, while her cooking remained the source of her family's love. The only major change during those two decades was the increased focus on the ease and convenience of meal preparation with packaged foods.

Ads for Chef Boyardee emphasized the quickness of meal prep ("In five minutes...dinner with an Italian touch"), Libby's Beef Stew promised its "most like homemade" quality and mothers were assured Campbell's four-minute soup was perfect for growing kids.

Hellmann's bucked the food advertisement trend by focusing on quality instead of speed. Introduced to Canadians in 1955, it came out with a TV ad depicting an animated chicken happily cracking her own egg and espousing the benefits of real ingredients in the product. Live food shots of elaborate sandwiches, salads and dips were cut into the cartoon promoting the brand's ability to "bring out the best" in your home-cooked meal.

In the '60s, it introduced the tagline "There's no place for second best. This is the place for Hellmann's," with one ad featuring an elegantly styled potato salad masquerading as a two-tiered cake while another features a family at

the beach with the wife making sandwiches out of a fully roasted chicken she brought along.

A '60s TV spot featured a woman hosting a dinner party, while a (surprisingly catchy) jingle plays over top: "It's fun to have a party, but everything must go right. Now here's a dip that's so right. This is no place for second best. When you want to bring out the flavour and bring out the zest. Just bring out the Hellmann's and bring out the best."

Hellmann's deviated from the simple and fast packaged food messaging trend by featuring elaborate meals and concoctions. Hellmann's was meant to enhance a meal that took some effort to prepare, not simplify it. Unlike brands like Campbell's and Chef Boyardee, it was not presented as a shortcut.



1970-1990

In the '70s, the Canadian government became more involved in protecting consumers, cracking down on false claims and potentially inaccurate brand promises.

Towards the end of the decade, Harold Simpkins (who is now a lecturer of marketing at Concordia University) began his career as product manager at Best Foods, which was owned by the Corn Products Refining Company at the time, and remembers receiving notice from the Department of Consumer and Corporate Affairs that Hellmann's could no longer use the word "real" in ads. Decisions from the DCCA were considered

final and couldn't be appealed.

"Their logic was it implied other mayonnaises aren't real," he says with a laugh. "It got a bit scary [because] I think we would have been the only country Hellmann's was marketed where we wouldn't be allowed to call it real."

The brand got a reprieve in 1979 when Labatt challenged the constitutionality of the department over its decision to bar the company from naming a beer "Labatt's Special Light," setting a precedent that allowed brands to appeal the department's decisions. The DCCA was later dissolved in 1993.

This wasn't Hellmann's only challenge during the decade, says Simpkins. Nutritional information began appearing on packaging and the notion that certain foods cause health problems began to emerge. Butter and eggs turned into public enemy number one, which was not great for a brand built upon its stance that it is made with real eggs.

Hellman's stopped mentioning eggs in ads, though Best Foods continued to maintain the "real" nature of its product.

Our obsession with health continued into the 1980s, and marketers saw it as a huge opportunity. For example, Slim-Fast emerged with its first shake in 1987 and Stouffer's introduced Lean Cuisine as a healthier frozen dinner option in 1981. Companies raced to release "light," "no fat," and "low fat" offerings, cutting calories out of food (and sometimes taste).

Hellmann's was no different, introducing a low-fat option, deviating from its traditional promise of "real" by adding modified starch and sorbic acid to the recipe (low fat Hellmann's is listed as dressing, not mayonnaise, and doesn't use the claim "real" anywhere in the messaging).

On TV, Hellmann's began to toy with the use of comedy in

Centre: The egg-cracking chicken introduced Canadians to Hellmann's in 1955.



A 2010 ad, "Love Notes," by Ogilvy in the U.S., asks "how do you spread the love?"

its commercials, as did most brands in the '80s (the other go-to being quick-cut music video-style spots). One ad featured two women continually bickering over everything, from card games to recipes, only agreeing that a recipe is better with Hellmann's.

1990-2005

The brand moved deeper into comedy and away from pure product benefits through the '90s.

Hellmann's main competitor Miracle Whip also tapped witty lines and began its "A sandwich isn't a sandwich without Miracle Whip," campaign with tags like "Ever seen a grown man cry?" and "You can still invite people over for the game. They just won't come" next to an empty jar. This was the point when ads began to shift away from functional benefits of the brand, says Leung, towards a more emotional connection.

An early '90s Hellmann's ad emphasized the brand's prestige, featuring a group of construction workers eating bland sandwiches, while one enjoys his by candlelight, declaring in a pompous tone: "Gentleman, your culinary preferences are exceedingly appalling."

Another features a young boy navigating through his cheek-pinching family at a reunion only to discover his sandwich is without Hellmann's. He must brave the

room again to make his sandwich complete. All the ads focused on the exceptional taste of real mayo. (Toronto's BBDO picked up the account in Canada in 1994, though information wasn't available on which of these ads it made.)

Best Foods was acquired by Unilever in 2000, which maintained the '90s advertising status quo. Hellmann's ads in the early part of the decade began to take on an almost absurd tone. One spot, by New York's BBDO, features a man mesmerized by a magician on TV who can bend metal with his mind, only to discover the knife in his hand has been warped. Another, by Lowe and Partners, features three male strippers at a bridal shower who can't compete with the attention Hellmann's laced food is getting, while a third, by U.K.'s Ammirati Puris, features a woman getting comfortable with her sandwich while she removes her bra. All the ads ran in Canada.

After 2003, Canadian creative, which consisted mostly of print ads, was handled by the now-defunct Toronto agency Zig, though local ads seemed to be minimal.

2005-PRESENT

Hellmann's was losing momentum with consumers. A survey conducted in 2005 found that 75% of Canadians believed that Hellmann's was "junk in a jar." But there was a changing perception

of food on the horizon that Hellmann's, with its claim to "real," would be able to easily tap into.

Throughout the late '80s and '90s, free trade agreements made it possible to have goods manufactured cheaply overseas, but as society moved into the era of the internet and hyper-transparency in the new millennium, the human and environmental toll of the migration abroad led to a push-back in the food industry.

Added to that, people moved away from "light" or "low fat" options towards calorie controlled "skinny" (but full-flavoured) offerings and the increased "foodie" movement sparked a desire in us to play with our food and create elaborate concoctions and flavours.

More than that, people began examining the contents of what they ate much more closely, with concern over how processed and preservative-filled foods would affect long-term health. Brands like McCain's and Maple Leaf Foods experienced sales declines or stagnation. But while processed food companies raced to catch up (Maple Leaf and McCain's, for example, have both introduced "all natural" or "all real ingredient" products in the past three years), Hellmann's was already there. Though it hadn't talked about the "real eggs" and ingredients used since the 1950s, the recipe for Hellmann's hadn't changed, says Leung. And with 80% of the ingredients sourced from Canada, she says they were able to quickly capitalize on the locavore movement. (Globally, the brand has committed to using only free-range eggs by 2020.)

After signing on with Ogilvy in 2005, and coming off the heels of Dove's "Real Beauty" movement (another Unilever brand that works with Ogilvy), Hellmann's set about creating a movement of its own.

The "Real Food Movement"

marked a turning point for Hellmann's in Canada. It was both the creation of a social cause and the point when the bulk of ads started coming from Canada rather than the U.S. While the brand still utilized American creative, the Canadian office took more control over the marketing message, opting from a more grassroots approach.

While both countries focused on the "real" nature of the product, once again highlighting the simple ingredients, Canada opened urban gardens, signed Montreal-based chef Chuck Hughes as a spokesperson in 2008 (he recently baked a birthday cake with his mom in celebration of the brand's anniversary in a YouTube video), and began to reach out to families and kids, promoting healthy eating through locally-produced fruits, vegetables and protein.

sharply contrasts with ads from the previous 90 years. But Leung says it's been a successful move. "It makes sure people see the philosophy behind Hellmann's. Let's stop talking about how creamy and delicious our mayonnaise is. This isn't about shoving a jar [at consumers] and making a chocolate cake with it. We started saying, 'Hey, we're more than just a product.'"

The brand took money from its ad budget to start up urban gardens for people to plant their own fruits and veggies in 2009. Also that year, it created a mini-documentary looking at the state of food production in Canada, highlighting that as a nation, we import more food than we export, despite our abundance of farm land. In 2011, it established the Hellmann's Real Food Grant



Last year, Hellmann's drove a monster truck over a school's old deep fryer.

"We gave [consumers] an idea to buy into," says Leung, who joined the brand in 2011. Communication and ads focused on the people – how could you support your local farmer? What should you eat? How could you grow your own food? – rather than the Hellmann's product itself.

"In our [Real Food Movement] communication, you'll rarely see a pack shot," she says, which

Program to help organizations that connect families and kids with locally grown foods. In 2012, it gave a new kitchen to an Alberta school so it could make its own food rather than serve re-heated or deep-fried meals (and, despite not planning for it, an online video of the kitchen demolition was later turned into a commercial, "Bye Bye Deep Fryer."

Going forward, its grant program will undergo some changes in

The Real Food Movement really starts at home.


To join the Real Food Movement, there are lots of little things you and your family can do, like building a super sky-high sandwich for everyone to enjoy, picking berries at a local farm, making soup together or starting a backyard garden. And there are lots of little ways Hellmann's can help. Visit us at facebook.com/HellmannsCanada, where you'll find everything from fun real food recipes to more information about our 2011 Real Food Grant Program.



In 2010, the "Real Food Movement" shifted focus to children upon learning they were the greatest food influencers in the home.

structure, but Leung says they won't announce specifics until September.

And despite the lack of product shots, the campaign has been a success. In 2000, market share for the brand hovered below 30%, while Miracle Whip enjoyed 54% share. Today, that's reversed with Hellmann's at 52% and Miracle Whip dropping below 35%. "Bye Bye Deep Fryer" has been viewed online more than one million times since May 2012. Unilever has given away more than \$100,000 to organizations that connect people with "real food," and the Real Food Movement has picked up numerous CASSIES and Effies for sustained success.

"I've been at Unilever since 1998," says Leung. "And it was always, 'Hellmann's? Yeah, we're a good brand, but we're not number one,' and you never heard a lot about it. But [now] when we talk about how we grow Unilever, Hellmann's is at the forefront." 

Shopper insights and in-store experiences help turn browsers into buyers



Shopper marketing is not as simple as it once was. Without a doubt, today's path to purchase is extremely complex and populated along the way with an ever-increasing number of consumer touchpoints. Shoppers are not just influenced by traditional advertising and point-of-purchase materials anymore. There's social media and online product searches. They pre-shop online to educate themselves about products before entering a store and once there, can use their smartphones for 'showrooming' to do on-the-spot comparison shopping.

Marketers can either view these new retail ground rules as obstacles or decide to make technology and the new shopper behaviour work for them.

Kelly McCarten, CEO of Toronto-based brand marketing agency, LAUNCH!, says shopper marketing has evolved from simply being concerned about influencing consumer choices to being part of the pre-decision, in-store and post-purchase stages. And, it's all being led by shopper insights.

LAUNCH! has created its own insights database from the feedback from the 2500 brand ambassadors it has in the field and in-store across Canada. By engaging with consumers at point of purchase and gathering data in real time, the company is able to help clients quickly impact their brand positioning.

"The market has changed so dramatically. We're in an environment of heightened competition, diminishing brand loyalty and an increasingly fragmented media landscape. Manufacturers are really attuned to how they maximize and influence decision making at the retail level, at point of purchase. It really starts with insights," says McCarten. "They drive your planning for your brand to ultimately change or influence shopper behaviour. Insights are constantly changing as you can imagine, and that is affecting how you can position your brand. You have to be constantly updated and informed on your consumer to make sure you're hitting the critical touchpoints in order to influence behaviour.

INSIGHTS INTO SHOPPER ATTITUDES AND BEHAVIOUR

When talking about shopper marketing insights and research, TNS is a global pioneer of the discipline. Today, TNS provides retail and shopper research and partners with

retailers and manufacturers to research and test everything from packaging, promotions and POS communications to store and category shelf layout.

Mike Moussallem, senior research director, retail & shopper insights for TNS Canada, says that although shopper marketing tools are a bit fancier than in the past, he believes the biggest changes have come from being able to better understand the target shopper and to test POS material and the in-store environment prior to launch rather than looking back and evaluating a retail program retrospectively. He adds that a key element of this targeting is an understanding of the optimal communication levers that appeal to open category shoppers.

"We are at a stage where we have the ability to truly work within the shopper agenda and test new ideas in ways that maximize ROI. We have gone from a situation where something is done in the in-store environment and then you see a result, to really optimizing that investment to make sure you're getting the most out of it from the start."

The TNS Path to Purchase model is used to understand what influences shopper behaviour and decisions in-store. *Path Tracker* tracks the shopper throughout the store in order to understand hot zones and cold zones as well as optimal store layout and product placement, whether primary or secondary. Other tools include mock shelves, 2D and 3D virtual environments for testing POS material, packaging and in-store placement to help ensure maximum ROI.

"The days of interrupting the shopper and interrupting the shopping trip, are over. Now it's about facilitating the shopping trip, working with the shopper's agenda, and making that shopping trip as easy as possible. That's our philosophy when it comes to shopper insights," says Moussallem. "It's about relevance and helping the shopper minimize one or all of the three shopper currencies – which are Money, Time and Angst, or Frustration."

THE POSITIVE SPIN ON SHOWROOMING AND SMARTPHONES

The TNS Mobile Life study, which was released in May, found that mobile can also play a valuable role in reducing the risk that showrooming poses to retailers. Whether a local store or national chain, if a retailer has a bricks and mortar presence, it needs

to have a digital presence – and one that is mobile-sensitive - in order to clearly communicate with those shoppers.

Moussallem says that although showrooming may seem like the enemy, the key is to find ways to make shopping in-store the convenient option. Almost 60% of Canadians admit to showrooming behaviour. More than one third with smartphones are open to receiving mobile coupons while shopping and over one quarter of them are interested in using apps to help them navigate the in-store environment. And there lies the opportunity for retailers and brands.

"Anything that saves the shopper time, money or angst will help reduce the flow of people out of the shop to purchase elsewhere," says Moussalem. "In understanding exactly how shoppers are using their mobiles in-store, brands and retailers can improve their own offering and begin to nudge shoppers towards the tills."

Showroomers are looking to be reassured about their purchase decisions, the price and suitability, by reading reviews and checking social media as well as contacting family and friends for their opinions. Knowledgeable sales staff is still one of a retailer's most valuable assets, with about a third of the people in the TNS study preferring to deal with a sales assistant rather than online.

IMPROVING IN-STORE EXPERIENCES AND BRAND INTERACTION

Experiential marketing, the key area of expertise at LAUNCH!, is fast becoming an important tool to influence purchase behaviour. It takes product sampling to a whole new level. Experiential can involve everything from promotions, gaming, and mobile coupons to any activity that increases consumer engagement with a brand.

McCarten explains that today, the company's base activity is more than providing brand samples. In-store experiential allows brand ambassadors to influence product purchase right there in the retail environment because they can talk about the brand's points of differentiation and collect consumer feedback right on the spot. Those insights are collected and fed back to clients to provide them a



TNS

TNS is the world's leading shopper research agency. Built by pioneers of the discipline and specialists around the world, our Retail & Shopper team has more experience and know-how than any other agency. We completed over 2,000 shopper projects in more than 50 countries last year alone. Our shopper researchers have experience working on the client side of the business and as a result, are better able to serve clients.

In addition to providing retail & shopper insights, TNS advises clients on specific growth strategies around new market entry, innovation, brand switching and stakeholder management, based on long-established expertise and market-leading solutions. With a presence in over 80 countries, TNS has more conversations with the world's consumers than anyone else across every cultural, economic and political region of the world. TNS is part of Kantar, one of the world's largest insight, information and consultancy groups.



Shopper Marketing can be complicated.

It's made up by a series of inter-weaving consumer touch points that ultimately impact purchase decisions.

At LAUNCH!, we make sense of it all – whether it be crafting engaging social media & digital programs, influencing consumer behaviour, or generating buzz-worthy in-retail campaigns, we bring brands to life and create contagious connections with consumers.

LAUNCH! is the market leader in linking brands and consumers through integrated marketing experiences.

Make a connection with us at LaunchThis.com

LAUNCH!

LAUNCH!

LAUNCH! is the market leader in linking brands and consumers through integrated marketing experiences.

Founded in 1993, LAUNCH! has leveraged its experiential marketing expertise to expand into what it is now a fully-integrated brand marketing agency. Recognized as one of Canada's Top 50 Hottest

Agencies in 2004 and Top 10 Fastest Growing Agencies in 2005 & 2006, LAUNCH! is the only one in the industry to be named one of Canada's 50 Best Managed companies for eight years in a row. LAUNCH! prides itself on continually delivering measurable and award-winning results for Fortune 500 clients!

The LAUNCH! team is made up of a new breed of brand marketers that recognize the changing nature of building and promoting brands as one of the greatest marketing opportunities of our time. LAUNCH! understands that truly powerful brands cannot simply interact with their market's culture, they must deliver "contagious connections" that will leave a memorable experience in the consumers mind and create buzz-worthy discussions about the brand. LAUNCH! creates that connection through experiential interactive marketing – resulting in high consumer engagement and a sincere bond to the brand.



real-time summary of how their brand is doing against competitors and consumer attitudes to the brand.

"Whether we influence part of the pre-decision or part of post-decision, we can influence the engagement and excitement that someone has with the brand," says McCarten. "To me, that is very powerful. Each category is highly competitive and each brand is looking for key tactical advantages to influence consumer engagement and build loyalty to a brand, that's where experiential is so powerful – whether its in-store or outside of retail."

LAUNCH! brought innovation to a new experiential summer program for Carlsberg to celebrate 1847, the year the brand was launched. LAUNCH! created large Carlsberg clocks that will be in and out of bars across Canada. When the clock strikes 18:47, the clock lights up and the party begins. There is free beer for bar patrons plus instant-win tickets and other prizes for consumers. The social media component involves Facebook and a chance to win an invite to one of three exclusive Carlsberg parties with Grammy-award-winning talent.

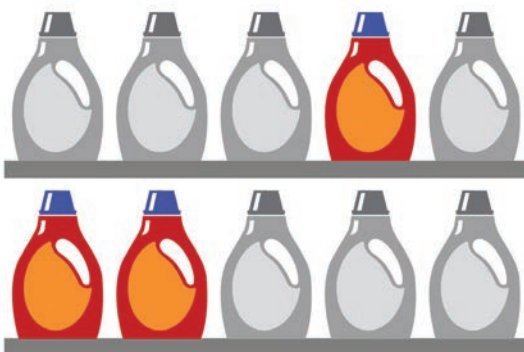
To launch Parmalat's KIK drinkable yogurt to a younger age group, LAUNCH! developed a vending machine to dispense product samples. The twist was that the young consumers had to kick the machine to get their sample. When they kicked it, the machine took their picture so they could share it on social media sites.

McCarten explains, "Experiential is about bringing innovation to life for a brand, to effectively engage with the right target market, build excitement and long term loyalty. Consumers want to interact with brands in their own way. Retailers and manufacturers need to address that desire in a unique, experiential way." With expert local partners providing shopper insights and program development guidance the opportunity for Canadian retail is there for the taking.

Stop Interrupting The Shopper... and **Work** With Their Agenda

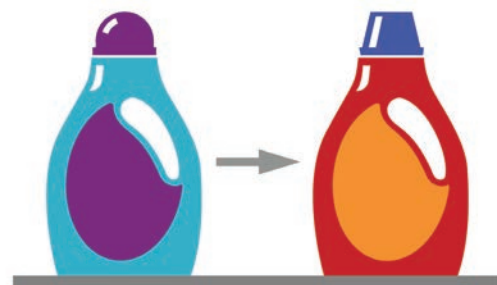
TNS Shopper Decisions

Increasing category and brand conversion at shelf



TNS Shopper Directions

Testing and identifying winning initiatives to drive sales in store





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SUN

8
Storage Wars
Canada

8:30
Meet The
Family

9
Revenge

10-11
Betrayal



MON

7+7:30
Modern Family

8
How I Met Your
Mother

8:30
Package
Deal

9
2 Broke Girls

9:30
Mom

10-11
The Project
- Guatemala



TUE

7+7:30
Modern Family

8
Dads

8:30
Brooklyn
Nine-Nine

9
New Girl

9:30
The Mindy Project

10-11
Lucky 7



WED

7+7:30
Modern Family

8
Revolution

9
Modern Family

9:30
Super Fun Night

10-11
Nashville



THUR

7+7:30
Modern Family

8
Once Upon
A Time in
Wonderland

9
The Crazy Ones

9:30
Parks And
Recreation

10-11
Scandal



FRI

7+7:30
Modern Family

8
The
Carrie
Diaries

9
The Middle/
Raising Hope (Nov)

9:30
Back In The Game/
Enlisted (Nov)

10-11
The Liquidator



City

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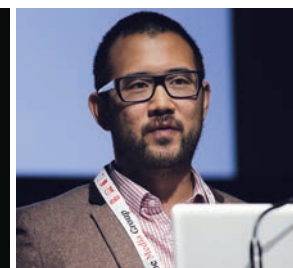


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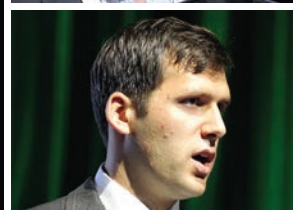
City



The 2013 AToMiC Conference was held on May 23 at the Kool Haus in Toronto, bringing together some of the best speakers from the worlds of advertising, technology, media innovation and content.



Counter-clockwise from top left: SapientNitro's Donald Chesnut speaks on bridging the gap between the physical and digital realms; PJ Pereira of Pereira & O'Dell asks "What if advertising were invented today?"; AToMiC host Steve Mykolyk of Taxi shared Tesla facts garbed as a construction worker and lab tech; Jaime Woo, author of *Meet Grindr*, shares what brands can learn from dating apps.



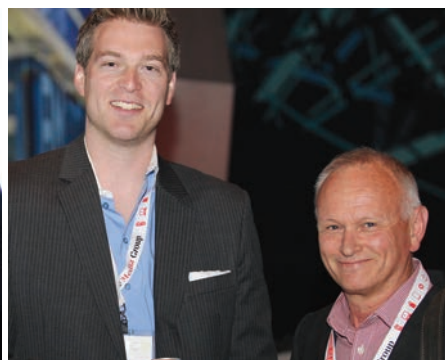
From left: AToMiC co-host, OMD CEO Cathy Collier; *strategy*'s executive publisher Russell Goldstein; OMD Ignition Factory's Trevor Guthrie says agencies are responsible for identifying and investing in new tech; anthropologist and author Grant McCracken gives the keynote address, "What's in a meme?"



HitSend CEO Brennan McEachran shares his insights on crowdsourcing; Kevin Keane, co-founder of neuromarketing company Brainsights, explains how metrics power creativity; Nathan Shedroff from California College of the Arts discusses the relationship between science fiction and interface design; Jungle Media's Sheri Metcalfe, Cossette's Mark Smyka and trainer/consultant Joan McArthur take a networking break.



Gaye McDonald (left) and the CBC team with their hardware during cocktails; *strategy* executive editor Mary Maddever with McDonald's Michelle McIlmoyle, Tribal DDB's Andrew McCartney and Samsung's Mark Childs.



BBDO's Nicole Polivka, Leo Burnett's Dom Caruso and BBDO's Tim Welsh enjoy their beverages; the *Globe and Mail's* Andrew Saunders with Cundari's Cory Eisentraut and Mike Sipley showing off the agency's three Golds for the SickKids Pain Squad app; Johnson & Johnson's Danny Sherkman and Idea Couture's Will Novosedlik.



Award winners, clockwise from left: Leo Burnett's Anthony Chelvanathan collects for JR; Leo's Dave Federico, Dustin Rideout and Morgan Kurchak won for Ikea work; Bell Media's Catherine Halliday, PHD's Liana Tamulaitis and Free Agency's Chris Unwin; Steve Mykolyn and co-host Lauren Richards of Pollin8; co-host Mark Bishop of Marbledmedia with John Young of Temple Street Productions.



The 2013 AToMiC Awards, held after the conference, celebrated the best campaigns, programs and innovations that challenge the status quo, with McDonald's and Tribal DDB taking the Grand Prix for "Our Food. Your Questions."

Would you watch your own branded content?

BY CHRIS UNWIN

When it comes to branded content, companies that lack the courage to prioritize audience entertainment will pay for it.

Literally.

In an attention economy flush with creativity and access, consumers have more entertainment choices than ever before, be it a hit TV show, a 17-year-old's style blog or an Instagram feed. Standing out amongst all the noise is difficult and, to make matters worse for brands, they have the added challenge of converting sales on content while everyone else is solely focused on engaging their following.

Most consumers are indifferent to branded content. Like entering a conversation with someone whom you suspect is going to ask for a favour, consumers see through the thinly-veiled intent. Advertising in sheep's clothing.

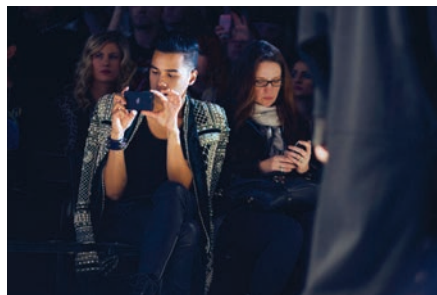
It's not just consumers though. The truth is that most boardroom execs wouldn't watch their own projects if they were at home. Naturally, in producing branded content, marketing

plan mandates tend to enter into tugs-of-war with entertainment value. This must change as the leverage points on the success of a campaign increasingly rely on audience response.

We need to retrain the muscle memory left over from an interruptive advertising paradigm, where brands paid for all of their impressions,

and earned media wasn't a vital key performance indicator. YouTube view counts demonstrate the point: many brand channels are filled with high production value content that yields only a few hundred views. This isn't sustainable.

Compelling branded content is the future of marketing and entertainment, but brands need to act like publishers. Marketers that think like a media company stand to benefit from incremental editorial value through media partners, partnerships instead of endorsements with influencers, earned and shared media impressions via social, and brand affinity from consumers.



With the *Live/Work* series, BlackBerry empowered stories of cultural creators, such as style blogger Jay Strut.

Free Agency recently launched an initiative with BlackBerry and Bell Media specialty channels that demonstrates the opportunity. *Live/Work* is a web series that profiles cultural leaders – from fashion icon Jianne Beker and master chef Susur Lee to tech CEOs and style bloggers – and provides insight into their personal and professional success. In sharing these stories, several lessons in crafting engaging branded content were identified:

Connect the deepest brand ideals with emotional needs. The core of the BlackBerry brand drove the web series concept – empowering personal and professional success, an idea universally applicable and emotionally visceral – rather than the BlackBerry device itself.

Put the product in the organic context of the story. Building on the voyeuristic approach to the content, viewers were able to peek into the subjects' lives by browsing through their BlackBerry calendar and to-do list.

Use a broader set of tools to convey the brand. Beyond logos and integration, music, colour palette, font selection and site design were among the ways we showed off BlackBerry.

Collaborate with expert voices, communities and creators. BlackBerry crafted its partnership with Bell Media and various influencers to bring third-party credibility to the project.

Finally, and most importantly, WIWI? "Would I Watch It?" was the phrase used throughout the production process – a way of keeping us "honest" while ensuring that BlackBerry's business objectives were hit.

Now more than ever, consumers look to brands as a voice for culture. Because BlackBerry has a proven track record in helping professionals manage and optimize their hectic lives, the brand's role in commissioning *Live/Work* brought credibility to the project.

Similarly, consumers look to Urban Outfitters as an authentic voice of youth in the summer (as exhibited with its #EndlessSummer Instagram campaign), and to Coca-Cola as the voice of happiness throughout its long line of outreach.

As publishers, brands have a competitive advantage in a crowded mediascape, but only if they invest in stories that consumers want to hear. Success in branded content will come to companies who view their product and content as a means to higher ideals, like well-being and happiness. More profound than product, future marketing successes will be measured not just on units sold, but also on consumers moved.



CHRIS UNWIN heads Toronto-based social content studio Free Agency, which helps brands act like publishers and orchestrates collaboration between media companies, brands and leading digital creators to produce compelling entertainment.

The myth of the second screen

BY MAX VALIQUETTE

Marketers and broadcasters, we're a lot alike. We're trying as best we can to respond to consumer trends. When we notice something, we name it so we can work it into our decks and presentations, and ground the work we're doing in a shareable idea. And shareable ideas need names.

Lately, both marketers and broadcasters have been writing about something we've called the "second screen," because we're supposedly using an additional device to interact with the primary content we're consuming.

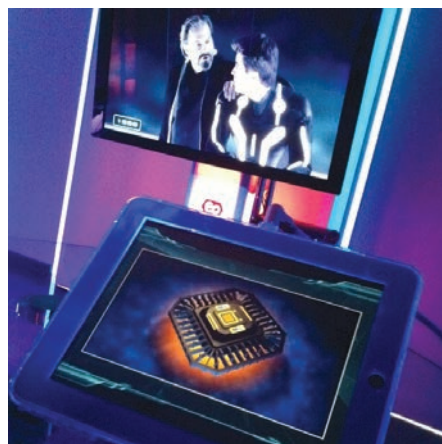
As a concept, it's not entirely flawed: it recognizes we no longer just watch TV or play videogames or do anything else on its own. We're tweeting and texting when we do. In response, broadcasters want to create a more immersive experience; marketers want to send you messages where you're actually looking.

It sounds great, but the term is fundamentally flawed, and it's going to lead to another challenge for an already beleaguered entertainment industry.

Consumers don't think of it as a "second screen" at all. They're not married to any particular form of screen, nor to any number of said screens. What they're married to is on-demand content, a two-way system that allows them to

interact with that content as they choose, and then share those interactions with their networks.

Broadcasters need to think about the larger ecosystem they're working within. Instead of just trying to get me to tweet at their show from my



phone, they should think about why I'm tweeting in the first place. And about how easy it is for me to leave their channel once I'm already looking away from their programming.

But we invent a term like "second screen" because it suits our needs or because it's reflective of our view of the industry, and we build our business around this term and all of its flaws.

"Second screen" is an inherently hierarchical term – I think one of the reasons broadcasters like it is because it puts the internet second and the TV first (yet Canadians have recently been willing to give up their cable and keep their internet). But here we are, still pretending the phones or tablets we keep with us all the time are somehow secondary to the thing that commands our attention for a few hours every day.

The answer to all of this isn't just in developing a tablet app that streams your shows, or throwing up a series of hashtags over the course of your program. It's about reacting to the real trends that are out there. That starts with paying attention to how our customers really behave, rather than being handcuffed by our own industry bias or the clever name we've given a trend.

TSN has built an in-TV app called TSN Extra. It's essentially a frame of sports

scores and other content that surrounds whatever conventional programming TSN is broadcasting at the time of use.

I'm not a massive fan of it, yet, as I find the interface clunky and inelegant. But I love the fact that they're actually thinking about how to get people to focus on the TV more, and they're doing so with customizable content that's probably reflective of the sort of material sports fans are looking for online when they're watching a game.

Right now, it's being dismissed as tough to use and tough to view. But should it automatically personalize the content it's showing me based on my preferences on their website, and should it activate with the sound of my voice and show me content based on where my eyes travel, it could be a game-changer. These developments aren't decades away. They'll be here in a number of years.

The single most important development in television in the past year has been Netflix's entry into content creation: *House of Cards* and the fourth season of *Arrested Development* may or may not be successes (as Netflix won't reveal the ratings for these shows) but it demonstrates there's a whole subscription model for a broadcaster without an actual TV channel on which to broadcast. Amazon and Hulu are already preparing their own shows, and more will follow. It's because these guys know there isn't any more of a second screen than there is a first or a third. There's just us, and our customers.

Broadcasters need to realize if someone isn't looking up at the TV from their tablet, that tablet isn't their second screen anymore.

It's their first.



MAX VALIQUETTE
is managing director
of strategy at
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Bensimon Byrne.

PHOTO BY PHILLIE CASABLANCA

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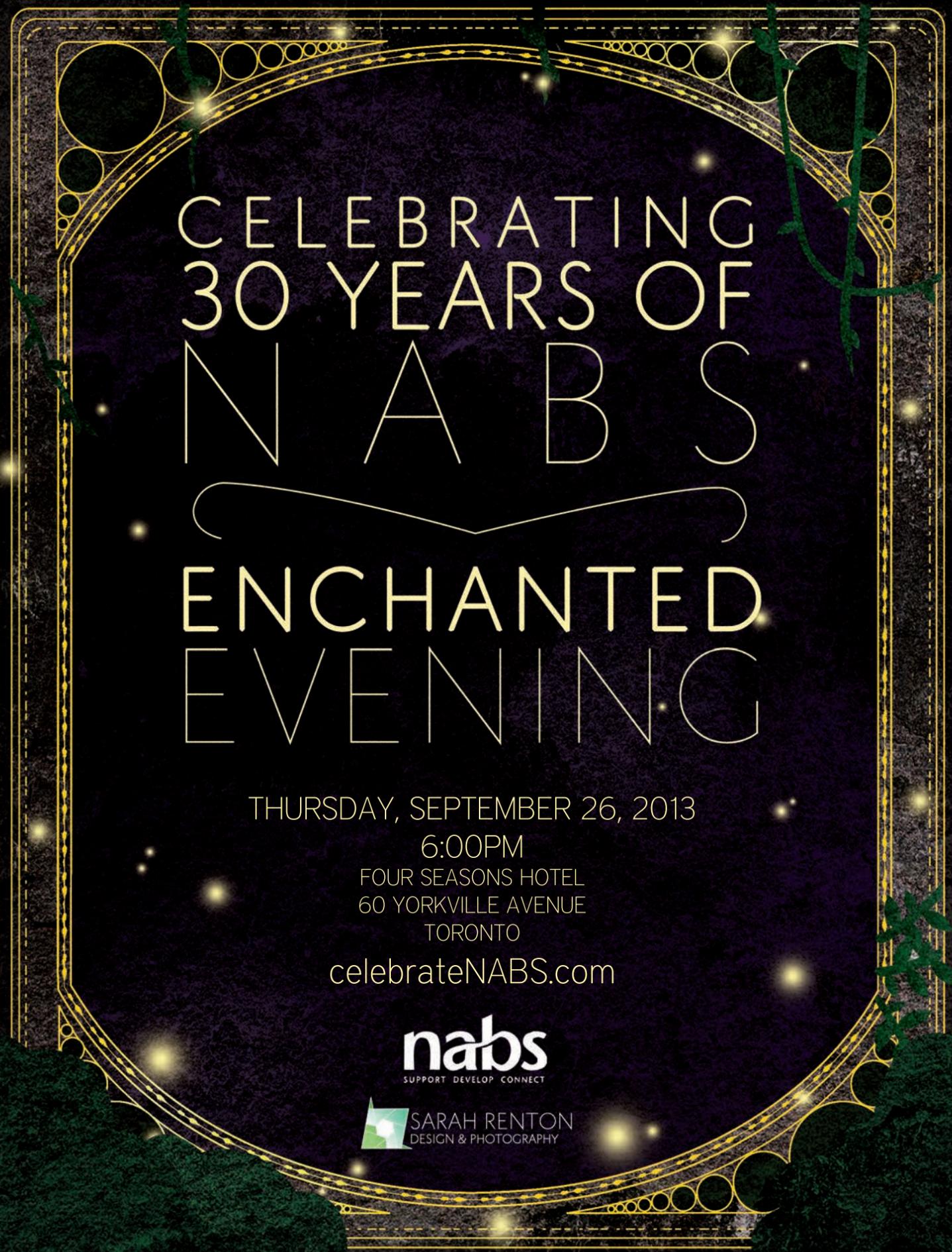
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