



strategy™

bold
vision
brand
new
ideas

THE NEW FACE OF TV **KILLER CONTENT EVERYWHERE. ALL THE TIME.**

NETWORKS FIGHT FOR
VIEWERS AS DIGITAL
BATTLEGROUND HEATS UP

CAN HOT SHOWS LIKE
ORPHAN BLACK BRING
NEW AUDIENCES TO TV?

JULY/AUG 2014 • \$6.95



Our sites rank 1st among all Canadian broadcast competitors. Our high-impact ad formats and integrations will deliver your brand story across all screens.

bellmediasales.ca

Bell Media



The networks are hoping folks will gather around their TVs (or tablets or smartphones) this fall to watch new shows like *The McCarthys* on CTV.

12

Beer gets crafty

Smaller brewers are upping the creativity to stand out among the big guys, and each other

16

The fight for Fall TV

It's a jungle out there, and the networks are battling it out with killer content and multi-screen strategies

46

The new partners

Digital content players, such as Yahoo! and AOL, are competing by forming bonds with like-minded companies

- 4 Editorial** Broadcasters get serious about television • **8 Upfront** Viners win media deals, Tweeters shape the social TV space and Redditors determine which brands are loved • **18 It's a primetime faceoff** as each of the big four broadcasters reveal their Fall TV plans • **26 The digital battle is on**, with networks introducing viewing apps and original online content • **31 Orphan Black** leverages its buzz for a strong second season on Space • **34 The analytics dilemma** has plagued the industry for years, so we run down where it's at and where it's going • **36 Specialty TV** is facing the threat of pick-and-pay, and networks are putting survival plans into action • **42 All the 2014 Fall TV shows** in a convenient chart • **60 Forum** Jim Kiriakakis on making real branded entertainment and Lauren Richards on the importance of targeting • **62 Back page** Cossette knows what all those internet cats are doing with their money



ON THE COVER: If the Fall TV issue teaches us anything, it's that content is king now more than ever, and viewers don't care where it comes from or how they're watching it – it just needs to be good. *Orphan Black* is a Canadian show on a specialty channel that has garnered major international attention, for being, well, really good, and has become the face of building an audience across platforms. Bell Media promoted the second season of the Space channel series with striking visuals of its star Tatiana Maslany. We borrowed one of those visuals – Maslany as clone Sarah – for our cover. The show certainly proves that content is king, or in this case, queen.

Getting serious about killer content

Confession: I only have basic cable. When I want to watch a show that isn't within my stable of channels, I binge-watch on Netflix, download, or watch it at a friend's house where it has been conveniently saved to their PVR. The only reason I hold onto my basic cable is because it makes me feel connected – I like watching the news, and doing what I do for a living, I also pay attention to the commercials.

Among my peers, there seems to be a great divide between those who are cutting the cord completely and those who, now that they are more financially comfortable, are going full-throttle with massive TV packages that include hundreds of channels. My generation – the younger Gen-X and the older millennials – now have households, children and disposable incomes. We're making decisions now about how we're consuming content (and paying or not paying for it) and our dollars and eyeballs are up for grabs, so to speak.

So how do you get them?

Throughout this issue, you'll find references to content being king and "killer content." Perhaps we're kicking a dead horse a little with those constant reminders, but we wouldn't be saying it if it wasn't more crucial than ever. If you need proof, just look at what the four big broadcasters have planned for the upcoming TV season (p. 18). Rogers is betting the farm on hockey. Why? Because it's appointment viewing that you're not going to binge-watch six weeks later. The beleaguered CBC is banking on a few dramas it's hoping will bring big buzz, like *The Book of Negroes*. Shaw and CTV also have drama-packed schedules with shows like *State of Affairs*, *Stalker*, *Gotham* and *How to Get Away with Murder*.

Why so serious, broadcasters?

The national nets have realized that to compete in a *Game of Thrones*/*Mad Men*/*House of Cards* world, they'd better up their content game. Today's viewer doesn't care where the content is, they just want it to be good. That's how a Canadian show on a specialty channel, like *Orphan Black*, can become a huge hit – it doesn't need a primetime spot on a major cable channel to carry it (p. 31).

Speaking of not caring where the content is, viewers also want to be able to watch anytime, anywhere, in the most convenient way possible. And the big TV broadcasters are starting to realize they need real digital game plans to compete with the likes of Netflix. Everyone is waiting with bated breath for Rogers to reveal its rival plan, and the other networks are also making serious plays in this space. See p. 26 for details.

Meanwhile, specialty channels are dealing with the looming threat of pick-and-pay (p. 36), although it's unclear what the effect will really be. I have to say – the option appeals to me. If I had the opportunity to choose my channels, there are a few I would happily pay for, and others I'd kick to the curb. And if everyone collectively kicks a channel to the curb, well we all know what happens to that channel.

So if you want to get on my radar and keep my attention, your content had better be...well, killer.

Emily Wexler, editor



VP, PUBLISHER | MARY MADDEVER | mmaddever@brunico.com
EDITOR | EMILY WEXLER | ewexler@brunico.com
ART DIRECTOR | TIM DAVIN | tdavin@brunico.com
ASSOCIATE EDITOR | MEGAN HAYNES | mhaynes@brunico.com
SPECIAL REPORTS EDITOR | JENNIFER HORN | jhorn@brunico.com
NEWS EDITOR | MATTHEW CHUNG | mchung@brunico.com
COPY CHIEF & WRITER | TANYA KOSTIW | tkostiw@brunico.com
CONTRIBUTORS | KATIE BAILEY | JIM KIRIAKAKIS | VAL MALONEY | LAUREN RICHARDS
ADVERTISING SALES SUPERVISOR | NEIL EWEN | newen@brunico.com
ACCOUNT MANAGER | KELLY NICHOLLS | knicholls@brunico.com
MARKETING CO-ORDINATOR | AIMEE ROSS | aross@brunico.com

CORPORATE

PRESIDENT & CEO | RUSSELL GOLDSTEIN | rgoldstein@brunico.com
VP & EDITORIAL DIRECTOR | MARY MADDEVER | mmaddever@brunico.com
VP & PUBLISHER, REALSCREEN | CLAIRE MACDONALD | cmacdonald@brunico.com
VP & PUBLISHER, KIDSCREEN | JOCELYN CHRISTIE | jchristie@brunico.com VP & CHIEF
VP ADMINISTRATION & FINANCE | LINDA LOVEGROVE | llovegrove@brunico.com
VP INFORMATION OFFICER | OMRI TINTPULVER | otintpulver@brunico.com

PRODUCTION & DISTRIBUTION SUPERVISOR | ROBERT LINES | rlines@brunico.com
SENIOR MANAGER, AUDIENCE SERVICES | JENNIFER COLVIN | jcolvin@brunico.com
MANAGER, AUDIENCE SERVICES | CHRISTINE MCNALLEY | cmcnalley@brunico.com

HOW TO REACH US

Strategy, 366 Adelaide Street West, Suite 100, Toronto, Ontario, Canada M5V 1R9
Tel: (416) 408-2300 or 1-888-BRUNICO (1-888-278-6426) Fax: (416) 408-0870
www.strategyonline.ca

CUSTOMER CARE

To order a subscription, visit www.strategyonline.ca/subscribe. To make a change to an existing subscription, please contact us by email: strategycustomer@brunico.com.
Tel: (416) 408-2448 Fax: (416) 408-0249. PO BOX 369 Beeton ON L0G 1A0.

SUBSCRIPTION RATES

STRATEGY IS PUBLISHED 12 TIMES PER YEAR BY BRUNICO COMMUNICATIONS LTD.
In Canada: One year CA\$80.00 Two years CA\$144.00
(HST included. Registration #856051396 RT)
Single copy price in Canada is CA\$6.95. Please allow four weeks for new subscriptions and address changes.

COPYRIGHT AND TRADEMARK

STRATEGY and the tagline "Bold vision brand new ideas" are trademarks of Brunico Communications Ltd. All rights reserved. Nothing may be reproduced from STRATEGY in whole or in part without written permission. Reprint requests should be sent to rgoldstein@brunico.com. © 2014 Brunico Communications Ltd.

POSTMASTER NOTIFICATION

Canadian Postmaster, send undeliverables and address changes to: Strategy, PO BOX 369, Beeton ON L0G 1A0 strategycustomer@brunico.com
U.S. Postmaster, send undeliverables and address changes to: Strategy PO BOX 1103 Niagara Falls NY 14304 Printed in Canada. Canada Post Agreement No. 40050265. ISSN: 1187-4309.

Member of CCAB

Canada

We acknowledge the financial support of the Government of Canada through the Canada Periodical Fund of the Department of Canadian Heritage.

FOR ZELEN SHOES DIRECT MAIL WAS A PERFECT FIT.



Baseer Khudayar

Owner of Zelen Shoes

"The campaign results, especially the 412% lift in mobile traffic to our website, far exceeded our expectations."

22%
more
ONLINE
SALES

THE SITUATION:

Zelen Shoes has become a destination of choice for footwear buyers, but is facing increasing competition from local vendors and e-commerce merchants in Canada and the U.S.

THE SOLUTION:

Using Canada Post's targeting capabilities, Zelen was able to focus on postal codes where its best prospects live. They sent digitally coded Direct Mail that instantly linked customers to their online product offering.

THE BOTTOM LINE:

The mailing had impressive results that saw 22% more online sales and 53% more hits to the mobile site, far exceeding those from other channels.

USE THE POWER OF DIRECT MAIL TO GROW YOUR BUSINESS.

To see how other businesses have grown with Direct Mail, visit canadapost.ca/Growth

CANADA
POST



POSTES
CANADA

It's a whole new throne game

In Canada, PwC pegged 2013 as the year internet ad revenue beat TV. But it's complicated. The internet spend includes digital ad revenue from TV, newspapers and other traditional media's online platforms, so it's indicative of ad dollars following audiences online rather than digital media cos solely usurping the throne.

Despite the long ramp up, it's still rocking a few worlds. A big chunk of the digital growth trajectory is video and mobile. So the digital native companies are heavily investing in original video content and making big content partnership deals – like Yahoo!'s concert-a-day streaming deal with Live Nation (see p. 47). The traditional media companies are also investing more in digitally-led video

content, and everyone's buying up smaller digital-native media brands.

No wonder the online players are making mainstream noise. During the NewFronts in New York, I saw OOH and taxi ads for YouTube channels.

So wooing viewers (and advertisers) keeps getting harder. And it seems like all media content companies are converging into one big competitive space. This begs the question: how will all this content be supported, and how will media brands be differentiated? But the new digital hangout space does play nicely into advertisers' big data desires. Precision targeting and analytics? The online video section (p. 52) shows digital's got that.

Yet we love our TV and newspapers in their non-digital modes as well, so a way to accurately track consumers across evolving mediums (see p. 34) is needed to make it easier for marketers to see how aspects of integrated campaigns work in tandem. Getting better TV ad-viewing intel has also been hotly debated – commercial ratings, cross-platform uniform results, addressability.

But despite metrics angst and streaming competition, the nets showed up at the Fall TV Upfronts with their game faces on, rolling out battle plans to woo the self-programming binge-addicted audience. Here's the gist: new shows in shorter bursts and repeats kicked to the curb; more live episode-viewing options to increase the odds of amassing audience; sorting digital rights and investing in inventory to satisfy binge-hooked viewers; embracing mobile viewing and promoting Go apps; mobile-first investment in short-form originals; exploring interactive storytelling.

Ultimately, to keep Canadian media companies relevant in the global content world, the converged audience needs to be equally valued – whether it's live or digital and delayed. It's crucial to the industries' mutual survival. After all, Canadian marketing departments need strong media partners to drive the value of local programs.

Plus, with our over-indexing web habits, we must be a very useful beta market for figuring out the converged future.

Cheers, mm

Mary Maddever, publisher, *strategy*, Media in Canada and stimulant

strategy

JULY/AUGUST 2014 VOLUME 25, ISSUE 6
www.strategyonline.ca

UPCOMING EVENTS

SUBMISSION DEADLINE: AUGUST 1, 2014


CASSIES

TORONTO / ARCADIAN COURT / SEPTEMBER 18, 2014

PR ! MO!

AWARDS | 2014

ALSO IN THIS ISSUE...

**ONLINE VIDEO
ADVERTISING**

SPONSORED SUPPLEMENT

\$52

UPCOMING SUPPLEMENTS

SEPTEMBER

OUT OF HOME "NOW"

COMMITMENT DATE: JULY 10, 2014

OCTOBER

**EXPERIENTIAL/EVENT
MARKETING**

COMMITMENT DATE: AUGUST 15, 2014

For details please contact your rep:

Neil Ewen
newen@brunico.com
416-408-2300 x248

Kelly Nicholls
knicholls@brunico.com
416-408-2300 x444

WE'RE JUST GETTING STARTED!



The central graphic features the CHCH logo, which consists of the letters 'CHCH' in white on a black background, surrounded by six colored semi-circles (orange, purple, red, blue, yellow, and green). Below the logo is the text '60 YEARS STRONG'. To the left of the logo is a group of four people, including a man in a suit and a woman in a green dress, with the text 'tiny TalentTime' and a star. To the right is a group of four people, including a man in a leather jacket and a woman in a light blue blazer, with the text 'the ORIGINALS'. Below the central logo is a group of six people, including a man in a suit and a woman in a black dress, with the text '2020' and '48 HOURS'. To the right of this group is the text '60 MINUTES'.

tiny TalentTime

CHCH

60 YEARS STRONG

2020

48 HOURS

60 MINUTES

the ORIGINALS

CHCH.COM/FALLSCHEDULE2014

National Sales
Mark Burko
Airtime Television Sales
416. 923. 7177
mark@etime.com

Retail Sales
Geoff Thrasher
Channel Zero Inc.
416. 366. 9688
geoff.thrasher@tvchannelzero.com

U.S. Sales
Laura Velazquez
Impulse Media Sales
212. 695. 4050
lvelazquez@impulsem mediasales.com



COMING SOON: CONTENT EVERYWHERE

By Megan Haynes

If all the world's a stage, then everything's a content channel. And with brands (literally) hiding messages in nooks and crannies, it was only a matter of time before content started doing the same.

Everyone's getting into the game: QSRs and retailers, like Tim Hortons and Sport Chek, are launching in-store TV networks. And then there's Mexican newspaper *Más Por Más*, which rigged a towel dispenser in a mall bathroom to spit out news updates in real time.

So it's time to stake a claim in the next content channel before you're beaten to the punch. Here's a couple suggestions of places just waiting to house the next hit.

ON THE WATER: People love sitting by waterfronts and they love "Shark Week" and *Jaws*. In 2012, Nissan created a holographic car show on a lake. So why not project an image on the water's surface? Yes, it will be dependent on calm waves, but it could be a perfect place for swimsuit lines to advertise their wares or display water-themed TV shows. Suggestions for a new show: *Real Housewives of Nova Scotia Fishermen*.

PUBLIC RESTROOMS: People out and about tend to have one thing in common: they visit the bathroom. May we suggest small TVs in stalls that stream pre-selected YouTube content (use of potty humour is optional), with unskippable pre-roll ads interspersed? The stalls can have low-level speakers to make for a complete surround-sound experience. The only risk: longer lines for the ladies' room.

THE DENTIST'S CHAIR: Already popular in several posh dentist offices, personal screens could show a feel-good movie (*Tooth Fairy* perhaps. Or maybe a loop of funny post-dentist videos, à la "David After Dentist") allowing patients to escape for a few hours (with the added benefit that the dentist won't ask them to speak). Just avoid anything scary that would make a patient jump out of his or her seat.

VINERS 101

By Jennifer Horn

Viners, as the six-second (mostly millennial) content creators are affectionately called, aren't just your regular influencers or glorified gif makers. They're hopeful actors, comedians, musicians, filmmakers and more.

Some are signing movie deals, like American Nash Grier (see below) and his fellow teen Viner Cameron Dallas have done with DreamWorks' AwesomenessTV. Vine's fifth most popular creator, Alx James, also signed a reality TV development deal with Collins Avenue.

And what's a star in-the-making without an agent? These early Vine adopters are being headhunted by talent companies like New York's GrapeStory and L.A.'s Jukin Media to work with entertainment companies and marketers.

More than 150 million people worldwide have downloaded the app, and in the first quarter of 2013, it saw an impressive 403% growth in users. Though still in its infancy, the platform is attracting early-adopter 18- to 25-year-olds, who join Vine to watch short videos (mostly on the weekend, at around 11 a.m.) born from the minds of the web's newest generation of creative, brand-friendly influencers.

For those who are still wrapping their heads around the concept of millions of people hooked on looping video, and haven't quite caught up with who's getting the most attention (and TV deals) in the space, here is a quick-hit look at the top three Viners you should know.



#1 Nash Grier (age 16)

8.1 million followers: The North Carolina teen gains approximately 100,000 followers each week, and he worked with MTV at the beginning of the year to promote its show *Teen Wolf* by creating looping gory werewolf videos.



#2 King Bach (age 25)

6.9 million followers: The Canadian-born comedian/actor is based in California and was first known for his YouTube channel, BachelorsPadTV. He plays a recurring role in Showtime's *House of Lies* and starred in *Nick Cannon Presents: Wild 'N Out*.



#3 Brittany Furlan (age 24)

6.3 million followers: The California comedian is the most popular female Viner and is famous for roles on E!'s comedy show *Reality Hell*, as well as YouTube show "Prank My Mom." She's

created content for the likes of Wendy's, Trident gum and Benefit Cosmetics.



SOCIAL TV BY THE NUMBERS

By Jennifer Horn

Montreal-based Seevibes, which analyzes who's talking about what in the social space, has launched a new social TV measurement tool, called Seevibes Market Insight. It's meant for broadcasters, agencies and advertisers to examine over 100 channels and 265,000 programs that air in Canada and find out what makes socially active TV audiences tick, which programs yield engagement and how to make digital work for them. In tandem with the launch, the company released a white paper on the state of social television in Canada. Here are some key stats from the report to whet your appetite for an increasing area of interest.

THE PURSUIT OF CASH (AND PR)

By Tanya Kostiw

Entrepreneurs looking for cash are turning to particularly public means of investment today. Yet for some companies, it's not about the green, but rather the exposure.

Corner Gas: The Movie recently joined the ranks of companies turning to Kickstarter for investment, even though it had already been fully funded. The Kickstarter campaign was actually a way to engage fans, says exec producer Virginia Thompson, with backers receiving interactive experiences such as naming a character, appearing in the credits, a speaking role or red-carpet screening tickets.

The campaign reached its \$100,000 goal in its first day.

Including fans in the process creates a sense of public ownership, says Thompson, which will hopefully result in people going to see the movie. And with all the publicity the campaign garnered, producers hope to reach new fans.

But the campaign also provided valuable insight, she adds. "It gives you excellent marketing tools as to where your fan base is, how old they

are, what their interests are."

Similarly, exposure from the CBC show *Dragons' Den* has, in some cases, been more valuable to contestants than the actual capital won.

Vancouver-based Counting Sheep Coffee has seen interest from investors and consumers in its products, which help put drinkers to sleep, since appearing on *Dragons' Den* in March. Founding partner and CEO Deland Jessop says he went on the program hoping a deal could help open doors and generate some publicity.

Prior to airing, the brand was only in one major retailer, Bed Bath & Beyond, but received a call from Federated Co-operatives Limited, after it saw the show, he says.

Loblaws will also carry the product in the fall, and Walmart reached out as well. The co has also garnered attention from media such as the *Financial Post* and *Metro*.

And while these public investment channels have proven to be effective strategies for some, Jessop and PR pundits warn it's a gamble and can hurt your company's reputation if things go sour.

65%

of Canada's 3.4 million Twitter users talk about TV on their profiles, while

36%

of Canada's 15 million Facebook users do the same

7 million

TV viewers engaged on social media in the first quarter of 2014

57 million

interactions (comments, likes, shares, tweets, etc.) were generated in the same quarter

77%

of these interactions took place on Facebook, while

23%

were on Twitter

THE SOCIAL DIVIDE

83%

of the reality show convo is on Facebook, while

67%

of sports talk is on Twitter

162 million

impressions are generated each day by fans of *The Ellen DeGeneres Show* (making it the **number one** show in terms of impressions tracked by Seevibes)

TOP THREE SOCIALLY DISCUSSED GENRES

#1

Reality shows

#2

News

#3

Sport

TOP SHOWS IN 2014 BY SOCIAL ENGAGEMENT RATE*

253%

Girls (HBO)

240%

The Following (Fox)

192%

CTV News

153%

Chicago P.D. (NBC)

*Figures exceed 100% due to engagement with content beyond Facebook/Twitter

REDDIT KNOWS WHAT CANADIANS WANT

Why do we love Tim Hortons but hate the telcos? By analyzing 20,000 conversations, Sonic Boom and the social site found that fairness, innovation and individualism were key demands from consumers

By Megan Haynes



Reddit and Toronto-based agency Sonic Boom partnered for an exclusive study, tracking 20,000 conversations to determine what Canadians want.

The idea behind the social study, says Ujwal Arkalgud, VP strategy, Sonic Boom Creative Media, was to have access to 7.5 million Canadian “trendsetters,” and figure out what’s important to them. Redditors are good bellwethers, says Victoria Taylor, director, communications, Reddit.

From this analysis, Arkalgud says three trends emerged: individualism, innovation and fairness.

For individualism, he says quirky brands and organizations that allow

audiences to build up a “bookish expertise” (i.e. amass a huge amount of knowledge about something) and really immerse themselves in the storylines, product or messages, will be the most successful over the coming year.

“They like content that begs for intelligent viewers and participants,” adds Taylor.

And people are demanding it, says Erik Martin, general manager, Reddit. Technology has made it possible to create personalized experiences, have personable conversations online and connect in a more authentic manner, so consumers expect the same of brands – especially those inviting people to connect over social.

Innovation was the second major demand from Redditors. “We’re finding that innovation [however], is becoming a dirty word,” he says. “Every organization claims they’re innovative.”

Redditors are really looking for companies to make life simpler. He points to the popularity of companies like Tesla Motors, which is making electric cars cool (and recently released its private patents), but also creating a direct relationship between manufacturers

and consumers – cutting out the dealer.

Finally, fairness resonated with Redditors. This is slightly different than the transparency trend that’s gotten lip service lately. It’s more than just being transparent about your practices, says Martin. In this hyper-connected, post-Snowden age, people can (and probably will) find out about your ethical practices. They want to know about your supply chain, hiring practices and technology.

They want a level playing field, an environment where everyone – from the CEO to the intern to the consumer to the manufacturers – wins. “Transparency exposes everything, so you have to be fair,” he says.

Creating jobs and supporting inventors and entrepreneurs were important “fairness” attributes to Canadians, Arkalgud adds. Tim Hortons, for example, is consistently named a beloved brand in the country. “It’s interesting how much consumers will support [it] because of the franchisee arrangement,” he says. “[Redditors view it as] supporting entrepreneurship locally and giving a lot of new Canadians a career.”

Telecommunication, unsurprisingly, drew the most ire from the community, Arkalgud says. “In Canada, it preoccupies a lot of the conversation. Consumers really feel that the telcom sector is truly lagging in this country.

“People are gravitating towards the smaller companies like TekSavvy as a way to express their individuality. They’re saying ‘I support TekSavvy even though their service isn’t necessarily as good as it needs to be, but hopefully I can play my part in moving the telecommunication sector forward.’” (Even Martin, an American, admits to being surprised at how strongly Canadians feel about telcos.)

Redditors, and consumers more generally, want accountability, transparency and most importantly, authenticity, adds Taylor. “It’s not that Redditors hate brands,” she says. “It’s that they hate feeling manipulated by brands.”

This story was a top post from *strategy*’s new online newsletter. Want more?
Head to Strategyonline.ca/subscribe.

strategydaily



DDB MULTIMEDIA
TURN INTO RESULTS

THE WORK THAT WORKED.

ENTER YOURS. DEADLINE FOR ENTRIES AUGUST 1ST, 2014 AT 12PM.

PRESENTING SPONSORS: STRATEGY, ICA, APCM, AND AAPQ.

PLATINUM SPONSOR: GLOBE AND MAIL.

JUDGING SPONSOR: MILLWARD BROWN. **DIRECT MAIL SPONSOR:** CANADA POST.

PATRON SPONSOR: TELEVISION BUREAU OF CANADA. **PR SPONSOR:** DDB CANADA.

CASSIES.CA

CASSIES

CRACKING THE CRAFT BEER CATEGORY

BY TANYA KOSTIW

Summer is a time for good friends and cold drinks, and craft beer is a popular BYOB choice. But which brew do you buy? In Ontario, craft beer's share of premium brands has increased to 3% from 1% in 2002, according to 2013 Ontario Craft Brewers data, which puts average retail growth rates at more than 10% yearly. Not long ago, craft brew stood out in the beer category, says Max Valiquette, managing director, strategy, Bensimon Byrne, but now with so many options, it's harder to do so. *Strategy* perused the category to discover what's resonating in the competitive space today and what exactly people are buying into – beer or culture?



JUDGING BEER BY ITS BOTTLE

For many craft brands, stand-out packaging becomes their default strategy – one that's seminal to communicating their difference, especially when marketing budgets are minimal, says Valiquette.

Dave Watson, CD design, North America, Taxi, points to brands like Vankleek Hill, ON.-based Beau's All Natural Brewing Company, Muskoka Brewery and Niagara Oast House Brewers for their thoughtful design details. With its authentic throw-back theme, Muskoka bottles look like they have been printed on directly, but their clear labels are a smart cost-saving tactic, he says. And despite a standard design, they still stand out on shelf. Similarly, Oast has an authentic feel, tapping into a country/hipster vibe, which carries through not only its logo and

packaging, but to its brewery, which looks like a classic barn, he says.

"Everything has been considered and I think the brand promise in all three of those beers really screams through that they're a little bit different, a little bit more considered than your macro-brewery."

But in the world of craft brewery, uniqueness is inherent to the category, says Jason Dubroy, VP, managing director, Shopper DDB.

"Excellent packaging has become par for the course," he says.

Even over-sized, half-litre bottles like those from Beau's and Toronto's Bellwoods Brewery should have been enough of a differentiator, but that's no longer so, says Valiquette.

The challenge now, he says, is to branch out beyond design because with so many options, your product will no longer stand out on the shelf.

FINDING STRENGTH IN NUMBERS

Quebec-based Brasseurs du Monde has carefully developed its packaging to tie into its worldly beer traditions image, with a different feel to each of the lines. It has dressed up its latest Sprits Line aiming to wow, with wax-sealed ceramic bottles imported from Germany costing the brewery about \$5 a pop – on top of the actual brewing process, says Alain Thibault, director of business development and communication.

But this is far from the line's main appeal – the Mauvaise Influence brew boasts the highest alcohol level (21%) in a bottled beer in Canada. The brewery spent more than a year developing it, as well as the Elixir brew (17.3% strength), ensuring they were still desirable to the taste.

"We wanted these two beers to help grow our reputation outside of our initial market," says Thibault, explaining how beer enthusiasts tend to discuss the release of strong brews on social media.



MAKING THE RIGHT FRIENDS

Some brands have been cozying up to more than just beer aficionados to raise their profile.

For a craft brewery, integrating into Toronto's culinary scene is key, says Valiquette. Brands with a strong presence at their physical locations can gain the respect of nearby chefs, and should aim to be at pop-up restaurants or special events with guest chefs, he says, rather than at a festival where they could be lost in the shuffle.

"A lot of these guys are looking towards interesting ways to get their beer out there in a small environment, but to the right group of people."

Beau's for instance has donated beer to major T.O. culinary events. It has also partnered with prominent figures, most recently with Canadian writers and environmental activists Margaret Atwood and Graeme Gibson on a new

gruit ale, which draws inspiration from botanicals referenced in Atwood's latest novel *MaddAddam*, to raise funds for the Pelee Island Bird Observatory.

Partnerships can help breweries stand out, says Dubroy, pointing out that good storytelling is half education and half entertainment – something Quebec-based Glutenberg Brewery saw success with through its recent partnership with renowned sommelier François Chartier for its Série Gastronomie.

With a nod to Chartier's aromatic creations, a new brew is developed for each season, and accompanied by food pairings. About 1,000 cases of the spring selection, the Imperial Sotolon, sold out within two months.

The kicker? The brewery is gluten-free, but the Série Gastronomie helps it expand beyond the gluten-sensitive market, explains David Cayer, co-founder, Glutenberg.



Nickel Brook Brewery, which will be a hub for creativity with an art gallery and performance stage.

"If the old brewery that defined Hamilton was Lakeport, we hopefully help to define the new Hamilton, which is a mix of manufacturing as well as art, music and culture."

Pairing art and craft beer is a relatively seamless concept, says Watson. "What I love about them is it reminds me a little bit of Jones Soda where it seems like there's so many different varieties and it's almost like their whole brand is anti-brand – it looks different every single time because of the artwork."

BEER FOR ART'S SAKE

With its mandate to blend supporting emerging artists with craft brewing's creativity, Burlington's Collective Arts

Brewing is slated to release its Series 3 labels in early July, inspired by the work of visual artists, musicians and filmmakers. (The last series featured 75 artists.) Using the app Blippar, consumers can scan the labels to view artwork, play clips or videos and learn about the artists. At press time, Matt Johnson, co-founder, Collective Arts, said downloading the artists' music through iTunes was in the works for the new series, and in the future, the brand is trying to enable users to buy artwork.

Collective Arts is also currently working on opening a new brewery in Hamilton with partner

SPIRITS GET IN ON THE CRAFT ACT

BY MATTHEW CHUNG

Given consumers' growing thirst for artisanal products and tech that's making it easier for small businesses to make and market things, it's no surprise that local distilleries have popped up in recent years touting small batch, hand-crafted spirits.

These distilleries are part business, part movement, says Sophia Pantazi, who co-founded Prince Edward County-based 66 Gilead (makers of rum, vodka, gin and Canadian rye vodka), with husband Peter Stroz in 2011. The pair produce their small quantities of spirits from scratch, buying grain, fermenting it and distilling it in a pot.

"This is slow alcohol," Pantazi says.

But to her chagrin, large distilleries are putting words like "crafted" and "small-batch" in their messages to try and catch lightning in their spirits bottles.

For example, Newfoundland-based Iceberg Vodka's latest OOH declares it as "Crafted in Canada's Iceberg Valley," after president and CEO David Meyers identified the fast-growing segment of the spirits industry.

Global brands are also tapping into the trend. Take Absolut's recent partnership to sponsor the maker movement, a tech-based extension of DIY culture.

"What's happened with beer, we see happening with spirits," says Barry Bernstein, co-owner of Concord, ON.-based Still Waters Distillery.

Still Waters, Pantazi's 66 Gilead and two fellow small-batch distillers in Ontario have formed an association to educate consumers and buyers and lobby the government to clear up just what can be considered craft.

POWERUP



ACADEMY AWARDS®



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

POWER UP YOUR



MARVEL'S AGENT CARTER



SUPER BOWL
XLIX

SUPER BOWL



THE FLASH



HOW TO GET AWAY WITH MURDER



THE BIG BANG THEORY

MEDIA BUY WITH CTV



AMERICAN CRIME



GREY'S ANATOMY

With the most highly-anticipated new shows, returning mega-hit series, and the biggest of the big live events on Canadian television, CTV is your top advertising choice this fall!

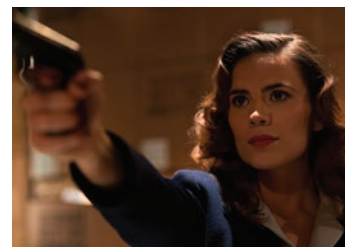
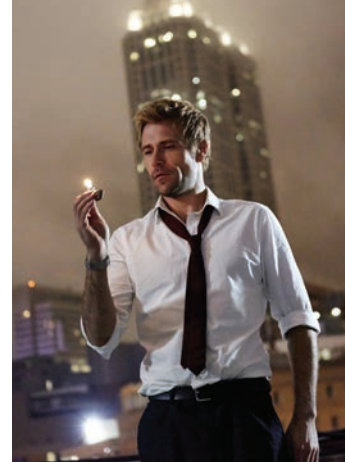
For more information, please contact your CTV Sales Rep today.

 @BellMediaSales

 @BellMediaSales

 Facebook.com/BellMediaSales

bellmedia sales.ca



The fight

From left: Content is king, and the nets are hoping to wow viewers with powerful drama and action this year, including the return of Space's *Orphan Black* and new shows *Constantine* (Global), *Marvel's Agent Carter* (CTV), *The Flash* (CTV), and *The Book of Negroes* (CBC).

BY VAL MALONEY & EMILY WEXLER

"This isn't a business for the faint of heart," said Kevin Crull, president of Bell Media, at the company's recent upfront presentation. He was talking about the era of months-long lead times for ad campaigns being long gone, replaced by plans that are done 30 to 45 days in advance of execution.

"In this business you have to fight for your advertising dollars every month. You start over with a blank sheet and you have to fight for it."

That battle is being felt across the Canadian content landscape with deals to garner audiences and advertising dollars done with bet-the-company level investments such as what Rogers Media did last fall when it paid \$5.2 billion to buy 12 years of national NHL rights.

Today's television landscape is rife with volatility, risky deals and an opponent that's no longer knocking at broadcasters' doors. It's arrived.

The latest PwC Global and Entertainment Media



for Fall TV

Outlook report says that in Canada, online ad revenue has surpassed television for the first time. And according to Ipsos, 27% of the TV subscribers it surveyed also subscribe to premium channels like HBO, Leafs TV or Super Channel; 20% have video subscription services like Netflix; 20% use video-retail services like iTunes, Google Play or Xbox Live and 7% use premium TV network website/online subscription services Nhl.com, Mlb.com, or Tmngo.ca.

Meanwhile, online content providers like AOL, Yahoo! and Blue Ant Media are ramping up their offerings and cutting major partnership deals to give viewers what they can't get on the TV nets (see p. 44).

But it's not all doom and gloom for the big guys. Ad spend on Canadian TV grew by 1.4% in 2013, with further gains expected, according to the PwC report. And according to the Deloitte Technology, Media and Telecommunications (TMT) Predictions 2014, more than 2.5 million households will have multiple TV

subscriptions by the end of the year, up over 150% from 2012 levels and more than 100 times the number of households that cancelled their cable last year.

Furthermore, the big broadcasters are seriously ramping up their subscription video on demand activity – if people are watching everywhere, the big guys want them to be watching on their platforms. See p. 26 for details on how they plan to get ahead in this space.

Rogers, Shaw, Bell and CBC are also going into this year's fall TV season with battle plans that target specific demos and focus on must-watch-now content, as outlined starting on p. 18. On the specialty front, high-quality drama like Space's *Orphan Black* (p. 31) is proving how big hits can transcend all screen competition and harness both online and broadcast to build bigger buzz. For more promising breakouts and platform strategies across the specialty space, see p. 36.

So read on to discover what the next year in television has in store.





PRIMETIME FACEOFF

When it comes to the fight for nighttime supremacy, each of the four major networks has its plan of attack. Shaw's Global is riding the trend of heart-stopping drama, made popular by those pesky pay-TV competitors. Rogers is going for more mass appeal now that hockey is on City. CTV hopes to maintain its domination of the weekly ratings, while CBC wants to come back with a vengeance after major budget cuts and the big hockey loss.

BY VAL MALONEY



ROGERS' MASS APPEAL PLAY

Above: Rogers Media is aiming to score a new audience through its NHL programming.

With \$5.2 billion spent on a 12-year, country-wide NHL hockey deal last fall that will fill up both weekend nights on its City schedule, Rogers went into the upfronts with a strategy to capitalize on the big audience delivered by its new favourite sport.

City only picked up four new shows to flesh out its existing sked, adding pieces that target broader than its former comedy-focused, younger-skewing fare.

That new mass appeal strategy aims to score more time with the NHL fans, says Hayden Mindell, VP of TV programming and content at Rogers Media. "These shows are more broadly targeted and will appeal to more demographics. There isn't anything too racy, nothing too masculine or too feminine."

Scorpion, a drama centred on an independent Homeland Security think-tank and the highly intelligent, socially awkward group that works there, bows Mondays

at 9 p.m., after the return of *2 Broke Girls* at 8 p.m. and *Mom* at 8:30 p.m. Keith Pelley, president of Rogers Media said the company would not have purchased the new drama if it didn't have the chance to promote it during *Hockey Night in Canada* on Saturday nights, likening the scenario to the days when he worked at Fox and promoted *The X-Files* during NFL games.

City's only conventional comedy pickup of the fall is *Black-ish*, airing on Wednesdays at 9:30 p.m. after ratings juggernaut *Modern Family*. It centres on a family in the suburbs dealing with assimilation and cultural identity and stars Laurence Fishburne and Anthony Anderson.

City has also picked up a show Mindell calls a "big get," the buzzy reality series *Utopia*, airing Tuesdays at 8 p.m. and Fridays at 9 p.m. It follows 15 individuals who leave their lives behind to create a new world with their co-contestants.

Finally, the channel will air the new Rainn Wilson procedural crime drama *Backstrom* starting mid-season.

In addition to hockey, Rogers Media is adding to its live event-based programming with the three-hour Broadway musical special *Peter Pan Live!* coming to the channel sometime next season. It joins the Grammy Awards and CMAs as part of the live event slate.



AWARD WINNING ENTERTAINMENT



OLN

STORAGE WARS CANADA WAS THE #1 SHOW ON OLN!

- Full day audiences are up 8% (2+), 16% (M18+), and 7% (M18-49).
- Primetime audiences are up 8% (2+) and 17% (M18+) while Specialty stations were flat in the same time period.

FX

THE NEWEST ADDITION TO THE FAMILY

- This summer, FX Canada's "younger brother" FXX, welcomes two new comedies – *Married* and *You're the Worst*.
- FXX is home to critically acclaimed series *Fargo*, *Wilfred*, *Ali G: Rezurection*, and *Eastbound & Down*.

FX CANADA

FX CONTINUES TO GROW

- Up 26% Full day (2+) and 31% in primetime.
- Up in primetime among key demos: 8% (A25-54), +8% (A18-49).

BBM Canada, 2012-13 Broadcast Year weeks 5-16, 19-34, excluding Olympic dates.
Indexed to 2+ vs national conventional networks. Primetime: M-Su 7p-11p

ROGERS | Media
ONE CALL
MULTIPLATFORM MEDIA SOLUTIONS



SHAW MEDIA GETS DRAMATIC

BY VAL MALONEY

Aiming to go big on drama for years, Shaw Media's Global Television re-upped its commitment to the serious side of programming this upfront season, reworking its schedule to build on the existing slate of returning shows, like *The Blacklist*, *Chicago PD* and *Sleepy Hollow*.

The channel went into this year's schedule-planning process with a

hour it has been investing in, but one from which other networks have been withdrawing.

To that end, Shaw picked up three new dramas for the time slot, with the Katherine Heigl-starring, White House thriller *State of Affairs* (pictured) to air at 10 p.m. on Monday nights when *The Blacklist* finishes its new episodes in November. The psychological thriller *Stalker*, starring Dylan McDermott and Maggie Q, takes the 10 p.m. slot on Wednesdays, and *Constantine*, a new thriller based on the DC Comics *Hellblazer* series starts on Friday nights in the prized hour.

Thursday night is the one Williams singled out as an area to improve. With *Glee* and *The Millers* no longer on Global and last fall's *Welcome to the Family* off the grid, the night had been left open to be reworked. The new show anchoring the night on Global is *Gracepoint*, a remake of U.K. crime mystery *Broadchurch*, starring *Dr. Who*'s David Tennant and *Breaking Bad*'s

Anna Gunn. Bailey Wilson, director of investment at UM Canada, says it's her favourite of the new season and will give her PVR a workout in the night's 9 p.m. time slot.

Leading into the new drama is *Bones*, followed by the start of the final season of *Parenthood* until November when it moves to Saturdays, when the third season of the Sherlock Holmes series *Elementary* takes over.

With NHL hockey on Rogers and football on CTV, Williams also wanted to present a new schedule that offered a different viewing perspective for Sunday nights, breaking up the more male-focused animation domination block and adding two new more female-skewing dramas to the mix.

Along with Fridays, Sunday nights are one of the two evenings during which the channel has comedy programmed. Sunday night starts with *Mulaney*, a new sitcom about up-and-coming stand-up comic John Mulaney at 7 p.m., leading into *Bob's Burgers*, which airs ahead of simulcast at 7:30 p.m.

The 8 p.m. hour features new drama *Madam Secretary* starring Téa Leoni as the newly-appointed secretary of state. Following the new White House drama is *The Good Wife* at 9 p.m., which heads into its sixth season.

Back after the female-focused drama block is the second half of animation domination, with *The Simpsons* at 10 p.m. and *Family Guy* at 10:30 p.m., airing post-simulcast with the aim to reach its more male-skewing demographic after sports games wrap on other channels.

Friday also features more light-hearted fare, with the second season of *About a Boy* at 8 p.m. and new comedy of romantic errors *Marry Me* at 8:30 p.m. leading into *Hawaii Five-0* at 9 p.m. and Canadian reality show *Border Security* at 10 p.m. until October when *Constantine* takes the slot.

THURSDAY NIGHT IS THE ONE BARBARA WILLIAMS SINGLED OUT AS AN AREA TO IMPROVE

few main goals: the first was to only add one new show a night in order to maintain stability and build off the power of existing hits, and the second was to increase the channel's presence on Thursday evenings.

Barbara Williams, SVP of content for Shaw Media, says Global went into the L.A. Screenings looking to buy shows to help it continue to build out its 10 p.m. time slot, an

MAKE CONNECTIONS THAT COUNT.

Reach passionate, engaged audiences
with compelling content integrations on our
incredibly targeted brands.



BLUE ANT
media

Connect with us: solutions@blueantmedia.ca



TV



Magazines



YouTube



Live Events



Digital



Above: The pubcaster is adding stardom with *The Book of Negroes* and *The Honourable Woman*.

Rogers Media's deal for NHL rights in Canada could not have come at a worse time for CBC.

Already reeling from significant federal budget cuts and a challenging ad market, the loss of hockey was a body blow for the pubcaster's programming strategy.

In recent years, CBC TV's biggest audience drivers have been news, NHL hockey, "shiny floor" reality shows like *Battle of the Blades*, competition reality like *Dragons' Den* and mega-sports events like the World Cup. On the primetime scripted side, it had a fairly stable mix of dramas (*Heartland*, *Murdoch Mysteries*, *Arctic Air*), comedies (*Mr. D*) and flagship factual shows like *George Stroumboulopoulos Tonight* and *The Nature of Things*.

That pretty much all went out the window this winter.

Strombo disembarked to Rogers, dramas *Arctic Air* and *Cracked* were cancelled, *Republic of Doyle* reached the end of its six-season run, expensive "shiny floor" realities were axed and CBC was left with a gaping hole where NHL ad revenue was supposed to be.

However, CBC did its best at its May 29 upfront presentation to paint a picture of decidedly less doom and gloom. And, fledgling as it may be, it has its sights on a new programming strategy it believes is reflective of both its budget and today's sophisticated TV landscape.

Helming this new strategy is Heather Conway, who stepped in to fill Kirstine Stewart's shoes in December 2013. Conway said the goal is to balance content trends, like high-quality serialized drama, with CBC's need to be savvy with its programming dollars.

The channel's new drama strategy will see two new one-hour originals debut this fall: *Camp X* (mid-season), a Second World War spy thriller based on a true Canadian story, and *Strange Empire* (fall, Mondays at 9 p.m.),

CBC 2.0

BY KATIE BAILEY

a frontier period drama set on the Alberta-Montana border.

Debating mid-season are the half-hour sitcom *Schitt's Creek*, starring legendary comedy duo Eugene Levy and Catherine O'Hara, six-part miniseries

The Book of Negroes (based on the bestselling book by Lawrence Hill) and *Pirate's Passage*, an animated feature produced and written by Donald Sutherland.

On the unscripted side, the CBC is taking a more modest approach to reality with *Canada's Smartest Person* (Sundays, 8 p.m., fall) hosted by former MTV personality Jessi Cruickshank, and *Of All Places*, which explores small Canadian towns, airing mid-season.

CBC will also air acquisition series *The Honourable Woman*, starring Maggie Gyllenhaal this fall, and *Secrets & Lies*, a six-part miniseries, this summer. It's introducing a new one-hour block on Sunday nights called CBC Selects, which will feature programming from other public broadcasters from around the world.

Of note, however, is CBC's first official move into the dedicated online streaming space with the beta launch of a new portal called Punchline. Currently featuring made-for-web shorts based on CBC series (like *Mr. D*) and clips from shows like *This Hour Has 22 Minutes*, the portal may evolve to also include original-to-the-platform web shorts, user-generated content or stand-up, explained Sally Catto, GM of programming, CBC.

Conway also emphasized an increased focus on comedy and argued that with both news and Canada-focused drama, CBC will reflect Canada's cultural sector (its mandate) and create compelling content to attract advertisers, which it needs. "That's part of the goal of the conversations we are having internally – finding dollars to invest in the schedule."

CTV CARVES OUT CO-VIEWING

BY VAL MALONEY

CTV was dealt three curveballs out of the gate at this year's L.A. Screenings buying period, when *The Big Bang Theory*, *The Amazing Race* and *Grey's Anatomy*, three of the network's top shows, were moved to new days and times by their U.S. creators.

Mike Cosentino, SVP of programming at CTV Networks, says those moves formed the basis of the channel's strategy going into the new season, with *The Amazing Race*'s move from Sunday nights to

Carter partway through the season and then go back to new *S.H.I.E.L.D.* episodes to round out the year.

Working the lineup so shows drop off and are replaced, as opposed to airing repeats, is a new strategy for the Bell Media channel. Phil King, president, CTV sports and entertainment programming, says the goal is to keep old episodes of shows, which lose viewers now more so than ever before, off the schedule.


Wednesday at 10 p.m. also features the split strategy with *Grey's Anatomy* starting the year in its new time slot in the fall before switching to a new arc of episodes from Canadian medical drama *Saving Hope* and then airing more *Grey's* to wrap up the conventional season.

New-to-CTV comedy *The Millers* comes to the channel at 8:30 p.m. on Thursday nights, moving from Global to the Bell Media network. *Two and a Half Men* follows at 9 p.m. in its final season and a new time slot for the Ashton Kutcher-starring comedy. New family sitcom *The*

McCarthys follows at 9:30 p.m. and recently-acquired drama *How to Get Away with Murder* bows at 10 p.m. for the first part of the season before switching to another new dramatic addition, *Secrets and Lies* (a different show from the one airing on CBC with the same name).

Friday at 8 p.m. is the new home for *The Amazing Race*, followed by *Grimm*, which stays in its 9 p.m. spot, with *Blue Bloods* airing at 10 p.m.

Sunday nights for the network have been reworked with NFL games added at 4 p.m., followed by the *CTV National News* at 7:30 p.m. and *Once Upon a Time* in its new co-viewing time slot at 8 p.m. Newly acquired from City, drama *Resurrection* comes to the channel at 9 p.m., rounding out the week.

CTV Two is anchored by *The Voice*, says Cosentino, which airs Monday and Tuesday nights at 8 p.m. He adds the channel has another co-viewing opportunity in *MasterChef Junior*, with the reality cooking show airing Friday at 8 p.m. 

GOTHAM AND HOW TO GET AWAY WITH MURDER WILL BE THE CHANNEL'S PRIORITIES THIS FALL

Friday at 8 p.m. helping to carve out a new nightly co-viewing hour for families in the time slot.

Monday night at 8 p.m. has new Batman origin drama *Gotham* (pictured) after *The Big Bang Theory* in its new pre-simulcast spot at 7:30 p.m. CTV's hit laughter from CBS will sit in the new spot for the first five weeks of the season while the U.S. broadcaster has it shifted from Thursdays for the NFL. Following *Gotham* is CTV's second new drama of the night, *Forever*, about a man who can't die.

Cosentino says *Gotham* and another newly-acquired legal drama Shonda Rhimes' *How to Get Away with Murder* will be the channel's priorities this fall, with the Batman-based drama and *Big Bang*'s pre-simulcast move getting big marketing pushes ahead of launch.

Tuesday's 8 p.m. co-viewing slot goes to another "super" addition to the schedule, *The Flash*, followed by *Agents of S.H.I.E.L.D.* in its new hour at 9 p.m. The sophomore season of the Marvel show will be subbed out for the launch of *Agent*



television and social media are like a puzzle. At least they should be. Broadcasters are looking into the shows through the discussion on social media. Enough? Shows have relationships waiting for the big moment.

Com
plat
vie
er
ex
to

an in
and tel
ch shows
ences that
opportunities
are changing
create experie
and second scre

BREAK THROUGH WITH Shaw) Media

QUALITY CONTENT.



platform. Viewers differ
viewers differ
engagement
experiences
to embrace
in conjunction with n

are ch
opportunities
experiences that allow for unique
watch shows on are
ill king, and television
campaign if used
best assets in
to be tapped
on the
ment and create opportunities
media habits are changing
ities and create



MULTI-PLATFORM
VIEWING OPPORTUNITIES.

TARGETED
AD SOLUTIONS.



specific hashtags to create a
show is airing. But is that
viewer to viewer
platforms that are
base could be one
of an integrated

giving
level of
and
we need
that work
viewing

we need
es that work
screen viewing

For more information visit
shawmedia.ca/advertising

ORY

BBC CANADA

NATIONAL
GEOGRAPHIC
CHANNEL

div
network

fyi,

Lifetime

TOUR

DejaView

IFC
Where the cool movies go.

Movietime

Global
NEWS



THE BATTLE'S ON, EVERYWHERE

Canadian media cos are locking up content rights across multiple platforms, beefing up their catch-up services and launching online original content in a bid to conquer the digital space **BY MATTHEW CHUNG**

Above: *The Americans* could be part of a larger SVOD offering from Rogers. **Opposite page:** *Orange is the New Black* is one of the shows making Netflix a must-have; *Vikings* is a hot property for Shaw, available on its History Go app.

The gloves are coming off. After years of taking it on the chin from over-the-top (OTT) providers like Netflix, Canadian broadcasters say they're ready to deliver the right combination to unleash a vicious counterpunch. Companies such as Shaw Media, Bell Media and Rogers Communications have been launching Go apps and on-demand platforms in response to consumers' (specifically, their current subscribers') media agnostic viewing behaviours. While analysts dismiss these "TV everywhere" offerings as defensive moves geared at protecting the media cos' ecosystem of cable subscriptions, the companies say they are laying the groundwork to provide more

of what audiences are looking for – namely, episodes of a show's current season stacked in a library for binge-watching and past seasons available at a price – combined with live streaming for traditional appointment-based watching.

But challenges remain for the traditional media cos.

While Netflix and the like are already offering past seasons of hit shows like *The Walking Dead* and *Breaking Bad* in their entirety for customers to devour, traditional TV players in Canada remain handcuffed by legacy rights agreements which, in some cases, means on-demand content is only available for a limited time to subscribers.

In the meantime, Netflix, buoyed by its buzzy, original series like *Orange is the New Black* and *House*

of Cards, is now in three million Canadian homes, according to research done earlier this year by Solutions Research Group Consultants. Raj Shoan, a regional commissioner for the CRTC, recently said most, if not all, the broadcasting companies had been caught "flat-footed" as Netflix arrived in North America.

While the CRTC has called subscription video-on-demand (SVOD) providers complementary to, rather than competitors with, cable, and chosen not to regulate them, broadcasters like David Purdy, SVP, content at Rogers Communications, believe OTT services like Netflix are affecting the traditional system, and it's unfair that they don't have Cancon requirements.

Meanwhile, Shaw Media's SVP content Barb Williams says the industry is still trying to get a handle on the value of content on different platforms and perfecting advertising technology. In May, Shaw announced

Bell Media customers could access content behind the subscription wall on its Global Go app. The service was already available to customers of other broadcasters, such as Rogers and Telus, meaning the app now has a potential customer base of 94% of English-speaking Canadians. As of May, it had been downloaded 1.1 million times, but Williams says it is not clear yet how often it is actually being used, making for complicated conversations with distributors, buyers, sellers and creators.

"I do believe as an industry we will get to a point that no matter where or when somebody watches a show, we will be able to effectively monetize that viewing experience and every view will be equal," she says. "But today, we are not quite there, so making sure we both drive and protect our main viewing platform (TV) is still of primary importance to us."

Fixing the discrepancy between TV and digital is an industry-wide concern that needs to be addressed urgently to stem cord-shaving and cutting, says Kris Faibish, former head of CTV's digital media division and executive director, strategy and business development at CBC, who has formed a media consultancy, Hatch Media, with fellow industry veteran Christine Wilson.

Viewers have spoken loud and

AS AN INDUSTRY WE WILL GET TO A POINT THAT...EVERY VIEW WILL BE EQUAL

clear: "I want great content, I want more of it, I want it all year round and I'm willing to pay you a fee to get it to me," she says.

"Content is still king," Wilson adds. "You can't push too hard in one area without shooting yourself in the foot in another, but my argument has always been, as the audience transitions, you too must also transition."



On the rights front, broadcasters say things are improving. For instance, Shaw Media now has stacking rights – the right to air on VOD as well as live broadcast – for about half of its primetime shows, which it makes available via its Global Go app, according to Williams.

Purdy adds that historical concerns that have been a stumbling block to making shows available indefinitely on demand, such as hurt ratings and ad-dollar erosion, should soon be a thing of the past thanks to dynamic advertising technology, which Rogers has begun offering for some content, such as *Hell's Kitchen* and *Modern Family* on the set-top box, rotating 12 unique Rogers-branded ads.

This allows media cos to insert and refresh ads in VOD content, keeping ads relevant. When combined with online targeting and measurement tools, Purdy says he believes digital will be on-par with traditional TV in terms of revenue.

Rogers has been rumoured to be working on launching its own Netflix-rival SVOD for years. The *Globe and Mail* published the claim in March 2013, followed by online pub Cartt.ca saying Rogers had



spent more than \$100 million to secure digital video rights.

Purdy was non-committal recently when asked about Rogers' SVOD plans, saying "the notion of being able to provide our customers with subscription, on-demand services that allow for the consumption of previous season look-back content is absolutely critical to our success going forward and we are working very hard to make that a reality."

He adds he saw no inherent hurdles to Rogers producing original content for its Anyplace TV or look-back service and, when asked about the possibility of a service not tied directly to being a cable subscriber, he says he could see the industry creating a

Your Brand deserves bigger.



Support brand building and sponsorships with interstitials and large format units that bring your campaign to life.



Large format ad units in Bell Media GO apps power better brand storytelling.

Audiences are mobile and Bell Media is delivering ad formats and placements that respect the user experience to help campaigns resonate, not irritate.

Our Mobile Universal Ad Package features three-screen formats like clickable pre-roll and big boxes to help you follow the eyeballs. Interstitials and large format display units served at natural moments give you a proper canvas for brand storytelling on tablet and mobile screens. Combine with support for rich media executions and you're ready to GO.



For more information, please contact Jonathan Dunn at 416.440.6408 or jonathan.dunn@bellmedia.ca.
bellmediasales.ca

BellMedia



“millennial solution that doesn’t involve a traditional TV offering.”

Already, the company’s ambitions to make its Rogers Anyplace TV more robust – making previous seasons available (likely for a fee), and stacking current seasons of shows, combined with its rights to buzzy shows like *The Americans* – certainly suggest the foundation is being laid.

In addition, Rogers recently stocked up its live TV offering and provided a preview of the programming it wants going forward, when it spent \$5.2 billion last fall for national rights for 12 years of NHL games across platforms. It also launched Sportsnet Live, a live stream of all its sports programming and events, and expanded its rights to include multimedia for its Thursday night NFL games.

Meanwhile, in May, Bell Media launched CTV Extend, an online original content platform, and Corus Entertainment’s W Network began airing its first online-only series, *#RippleEffect* (see sidebar), while Quebec-based Vidéotron has had a Netflix-like streaming service since 2013, stocked for the most part with French-language content.

As a whole, however, Canada’s so-called “legacy media” players are voyaging into the digital space a bit late. While acknowledging consumers spoke “a long time ago” about what they want and have found other means, including illegal streaming, to get it, Purdy believes most customers are happy to pay subscription fees for content to a company that can “simplify” the viewing experience.

“I believe fall of 2014 will be the sea-change moment when we are going to see TV anywhere explode and traditional TV providers offering content in a way that people have associated with OTT services historically,” he says. “You are not going to have to leave the ecosystem in order to be a happy customer.”



Making an online original push

As broadcasters ramp up their existing on-demand and on-the-go platforms, two media companies are stepping into the online original content space.

Both Bell Media-owned CTV and Corus Entertainment’s W Network launched original content hubs in May, offering a different take on the future of online content.

CTV Extend, an ad-supported digital hub available to anyone in Canada, sets the table for the broadcaster to air short-form content, including online exclusives like a digital spinoff of the *Veronica Mars* series announced during the upfronts, stand-alone online original series like *Backpackers* and *Guidestones* made available for binge-viewing, as well as spinoffs of all CTV’s linear programming, such as *Saving Hope: Last Call*.

“We want to create an environment not just for viewers but for advertisers who see value in the ability to own a piece of this exclusive space,” says Mike Cosentino, SVP programming for CTV networks.

Extend is available as its own platform and is also bolted on to the CTV Go app, which provides cable subscribers on-the-go access to live streaming and on-demand content. This creates a more robust mobile application for consumers, Cosentino says.

Cosentino says Bell is putting the full might of its primetime TV programming and digital properties behind promoting Extend, and the company is offering pre-roll and overlay ads.

Corus launched a reality web series, *#RippleEffect* (pictured above), on June 4, making a bold foray into online storytelling to test engagement levels for the viewer-driven series.

The series, which had its first two episodes funded in part by Bell Fund’s TV Development Digital Pilot, centred on three women pursuing goals in Toronto, with viewers able to send feedback and advice to the women on social media as the show was filmed, potentially altering the women’s decisions and direction of the show.

Corus sold ads around the programming housed on Wnetwork.com, but no advertisers had come on-board initially for the two-episode pilot.

It was promoted on the site, W Network’s newsletter, as well as on TV, said John MacDonald, VP, television, head of Corus women and family.

MacDonald called the series an online experiment because of its format, but also for Corus to see the appetite for that kind of programming.

“Hopefully they’ll try it, they’ll participate and we’ll learn the level of engagement that a show like this can generate,” he said prior to the show airing, adding that one of the goals is to see if “it can actually yield the kind of interaction that helps us in a story-telling standpoint.” No word yet at press time on whether it will be picked up for further episodes.



THE LITTLE ORPHAN THAT COULD

BY EMILY WEXLER

With killer plot lines and big buzz, *Orphan Black* has helped redefine what it means to be a Canadian specialty series

More than ever, content is king and original programming has the power to transform a channel with one smash hit rather than a tidily curated block. But with less platform-specific dwell time as viewers program their own schedules of “all killer, no filler,” how do you get their attention, especially with a genre/sci-fi show on a specialty channel?

For *Orphan Black*, it started with a key time slot for its debut last year on Space – right after the return of viewer favourite *Doctor Who*. But time slot alone doesn’t equal success, the content still has to be killer.

For those who aren’t in the “Clone Club” (the show’s loyal fan base) the series is about a young woman who discovers she was born as part of a cloning experiment by a large (and seemingly shady) organization. Lead actress Tatiana Maslany plays all of the clones (there were at least 10, five who are regular characters).

Produced by Toronto-based Temple Street Productions, in association with Space and BBC America, it’s a bit of an anomaly – a Canadian show on a specialty channel that is spoken about in the same breath as some of the massive, big-budget dramas in the U.S.

Orphan’s debut was the highest-rated original series premiere ever for Space. And it continues to perform well, averaging 330,000 viewers and making Space the number one specialty network for adults and women in the show’s time slot.

“By the end of season one, there was a passionate, invested and incredibly active fan base on social

media,” says Trinh Tham, senior director of marketing at Bell Media. “We knew our audience is highly engaged so we focused on delivering smart insider’s content including memes, BuzzFeed buys, exclusive photos and teaser trailers.”

To reach more digital natives, executions included a YouTube domination and BuzzFeed-sponsored editorial posts, such as “10 animals you probably didn’t know we’ve cloned.” There was also daily blogs, Q&As and weekly episodic (spoiler-free) recaps on Space.ca.


It worked. Between the second season debut in April and early June, on Twitter, #OrphanBlack generated an estimated 305 million impressions worldwide, from 280,491 Twitter mentions by 178,927 users.

While the marketing budget hasn’t necessarily increased this season, Tham says they’ve looked to build on the momentum from season one, when the show was promoted as part of a major rebranding of Space, aiming for a more mass appeal.

Promotion for the second season, created in-house in collaboration with BBC America, included mass media, such as subway takeovers with striking images (like the one on our cover), as well as radio and TV, to reach a mainstream audience.

On Space, Bell Media built buzz for the season two with an early sneak-peek trailer during *Doctor Who’s* 50th Anniversary Special, which was Space’s most-watched TV event ever, says Tham. Promos also ran during CTV’s tent-pole events, such as the Oscars.

Tham says there hasn’t been one big factor signalling the show’s mainstream success, but rather a steady increase in buzz and accolades.

Now even more eyes will be on Space as the show continues to gain momentum, and more mainstream fans join the Clone Club. 

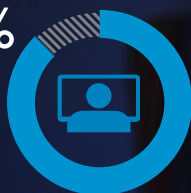
Clockwise from left: Tatiana Maslany plays Sarah, Helena, Sarah disguised as Cosima, Rachel, Rachel again, and Alison (confused yet?), just a few of the clones on *Orphan Black*.

THINK NOBODY WATCHES TV ANYMORE? THINK AGAIN.

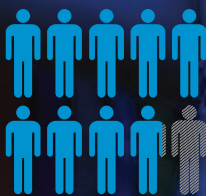
No ifs, ands, or *bots* about it, Canadians now spend almost half their waking hours consuming media, and 47% of those hours are spent watching video. That's as much as web browsing, listening to music, reading and gaming combined. Nothing engages people more - no platform delivers a bigger, more committed audience every day than TV.

It's what we watch

83%

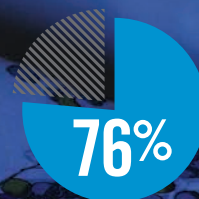


Canadians view 56 million hours of commercial television a day, more than 83% of their total video viewing time.



TV is the universal screen. 89% of consumers have one, and they use it for 80% of their video viewing hours.

76%



TV is a high priority medium for consumers. 76% of commercial TV viewing hours are spent on first-run programs.

It's what we care about

68%



TV is part of our lives. 68% of Canadians consider TV part of their daily routine, and half insist on giving it their "full attention" while watching.



We care enough to pay for it: \$80 a month on average.

2/3



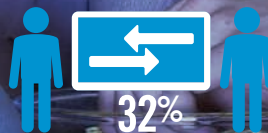
We commit to TV. 2/3 of us have shows we have been loyal to for more than 5 years, and 57% of us confess to "missing" those shows when their seasons end.

It's what we share



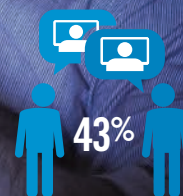
48%

TV is consumed socially.
48% of our viewing hours are
spent with other people.



32%

For Millennials, TV is even more
important to social sharing.
The most social generation is
32% more likely to use television
as a way to connect with
friends and family.



43%

TV connects us.
43% of us talk about TV
with family and friends.

Thanks to brilliant content, stunning viewing technologies and the amplifying effect
of social media, it's where what matters gets watched.

TV tells the stories that connect us.



Television Bureau of Canada

To download The New TV Landscape research presentation, visit tvb.ca/pages/TV



THE ANALYTICS DILEMMA

BY MEGAN HAYNES

Cross-platform measurement has been a hot topic for years. Now that multi-screen viewing is hotter than ever, is Canada getting closer to an all-encompassing solution? We check in to see where we are, and how far we have to go.

Last year, *strategy* hosted a TV analytics complaint line where we invited industry execs to voice their grievances about television measurement. A top peeve was the fact that there's no way to tell what else people are doing while they're watching TV – not with accuracy, anyway. That's still the case. And of course, this isn't just a TV-centric issue, but a problem in the entire analytics ecosystem.

Commercial ratings, platform-agnostic TV and streaming video stats, and measuring the entire consumer experience around screens, all remain elusive.

"The lack of unified measurement across platforms is, without a doubt, our biggest challenge," says Hayden Mindell, VP, television programming and content, Rogers.

This type of measurement across multiple devices would likely require a very large panel of people to participate in order to get an appropriate sample size, and the larger the panel, the more expensive it is, says Chris Herlihey, VP research, IPG Mediabrands. And there's building a new infrastructure (or paying to expand an existing one) to contend with.

Bryan Segal, VP sales, ComScore says that a new form of measurement may be necessary, and while Jim MacLeod, president and CEO of BBM, says it's a regular discussion they have, at this time, neither had a solution.

"There's [also] an industry challenge with who is going to foot the bill for these [new models or partnerships]," Segal adds.

What's more, these analytics cos are investing in their own metrics systems to deal with new and rapidly changing technologies in their own spaces (i.e. BBM's

VOD measurement and ComScore with tablets), which is also taking up funds.

Plus, it's hard to drive system change unless it really benefits the stakeholder, or in this case, multiple parties.

Confidentially, some who work in the media space say broadcasters benefit from the BBM numbers because they don't show who is distracted or why. Analytics companies want to preserve systems that have served them well and maintain a monopoly over their channel of measurement.

In light of there being no cohesive tool, media buyers have created their own, blending multiple sources of data with proprietary software and analysis tools, which they use as points of difference in client pitch processes.

Plus "agencies and media owners are overwhelmed already with the amount of data we have," adds Herlihey. Sometimes, it's all you can do to keep up.

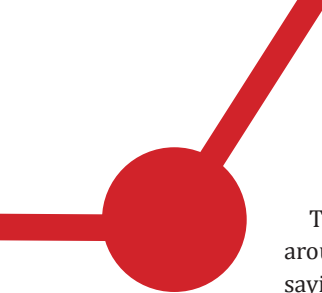
Essentially, no one is really racing to the front to say they'll pay for a different system to be put in place.

WHAT ARE THE WORK-AROUNDS?

In 2012 in the U.S., ComScore struck a deal with ESPN and Arbitron to outfit a panel of folks with PPMs and homes with box-top sets to measure video, audio and display content across radio, TV, PCs, smartphones and tablets. It deployed four and a half million box-top sets, and was able to find useful insights such as people who use multi-platform content spent twice as much time with it as those who consumed the brand on a single platform.

When asked if ComScore is looking into similar programs or partnering with BBM, Segal would only say it will not rule anything out, and has already deployed analytics across mobile, tablet and PC, and can measure digital streaming sites from non-broadcast partners.

In the meantime, "it's up to agencies to be creative with the data," says Herlihey. Many media agencies are creating hodgepodge programs that blend data from multiple sources, attempting to create full profiles of consumers with different formulas and proprietary insight. "But the more research we have, the better," he adds.



There may be some value in social media monitoring around television. If you can track what people are saying about your TV show, through things like Seevibes or Twitter's Bluefin Labs' TV analytics (which track social conversations about shows over Facebook or Twitter), then you have a better understanding of what people are watching while online.

"These emerging monitoring tools are a great way to track when audiences are most engaged with the content and how they were engaged with it," says Mark Bishop, co-CEO and executive producer, Marblemedia. "Those who are commenting on Facebook and Twitter are actively having a conversation about the property and are more likely to interact with additional content or advertisements leading to purchase opportunities."

And these companies are driving the conversation.

Seevibes, for example, recently made headlines by announcing its partnership with Havas Media to create a new measurement system, the Social Rating Point, a ratio measuring social interaction to TV audiences. It has also recently joined the IAB on the research committee, which is working to standardize metrics in the web space.

HOW CAN THIS CHANGE?

"We're here to respond to the industry," says MacLeod. So, in theory, if you demand loudly enough, they'll build it.


And some headway is being made in the cross-channel space.

In May, BBM rolled out a pilot program to blend radio and television data. And the Print Measurement Bureau and ComScore also partnered to fuse their information databases, proving different media analytics cos can play nice here in Canada.

And, as mentioned, ComScore and BBM have been in talks and MacLeod is confident they'll move forward with some form of partnership within the next year. "It's the next logical place to go," he says. However, the first step will be to determine what will be measured, so a blended data set may still be a ways off.

WHERE DOES THAT LEAVE US?

It's status quo right now. Everyone says we need cross-platform measurement, and there are ad hoc solutions in place, but no one has a solution for the root of the problem, which is that different companies maintain different data sets.

That's not to say the blame falls on them – there's only so much time and money. But to back up investments with meaningful metrics, a system that allows brands to gather an accurate portrait of what people are doing on all those screens is urgently needed. 



space

"INTELLIGENT, INFLUENTIAL, CREATIVE AND SOCIALLY-SAVVY. THE SPACE VIEWER CONTINUES TO EVOLVE INTO AN EXTREMELY DESIRABLE AUDIENCE FOR MY CLIENTS."

DOUG HIRST

OMD. BROADCAST MANAGER AND SPACE VIEWER



SPACE LEADS IN ATTRACTING LOYAL AND ENGAGED VIEWERS.

BELLMEDIASALES.CA/SPACE



CHOOSE YOUR OWN ADVENTURE: SPECIALTY TV EDITION

With consumers soon able to pick their own specialty packages, how are broadcasters coping, and who will come out on top?

BY VAL MALONEY

Specialty channels have never been stronger, bringing in record revenues in 2013, but the platform is being challenged with upcoming CRTC talks aimed at opening up cable subscription packages to a pick-and-pay model.

In essence, the regulator is proposing that broadcast distributors give subscribers the option to build their own channel packages, and additional hearings on changes to the model will come this fall as part of the CRTC's "Let's Talk TV" program.

Media companies are hunkering down in advance of the changes. Top channels like TSN are building out offerings, Shaw Media is rebranding to attract key demos for its channels and Bell Media is bulking up on

original programming to make stations like Space and Bravo irresistible.

As it stands, Michael Neale, chief investment officer at Mediacom Canada, says less than 10% of the 188 stations available on the specialty dial have strong brands with respectable audiences and the potential to reach those viewers on a weekly basis.

The channels that will win are ones with strong affinity, exclusive programming and specialized niches. Neale says the smaller channels will feel the heat the most, as they might not be able to afford to lose viewers. "The bigger players will bundle other products in ways that entice consumers to keep the channels. Small equals unimportant – it doesn't equal niche."

Sports, the most-buzzed about category of the year, still belongs to TSN, which holds the top spot in terms of specialty viewership for adults 25 to 54 from December 2013 to the end of May this year. TSN is launching three new feeds in the fall, and the channel has been pulling big numbers around its coverage of the Toronto Raptors this spring, averaging close to one million viewers for many of its national playoff games.

The new national feeds are intended to target fans who have what Phil King, president, CTV, sports, and entertainment programming at Bell Media, calls insatiable sports appetites. Bell's new sports launches are also set to shake up Rogers Media's plans to take over the top spot in sports with its recent blockbuster national NHL deal.

The other top-ranked sports channel is Rogers-owned Sportsnet sitting at number four in the national specialty rankings. It comes in second place when looking at the 18 to 49 demo, right behind TSN.

Meanwhile, Shaw is focusing on building its female audiences, says Barbara Williams, SVP of content for the media co. Adding to its staple of channels that target the demo, like HGTV Canada (sixth overall with viewers aged 25 to 54) and Food Network Canada (10th overall), is a key strategy as the landscape becomes

more competitive. To that end, the company recently announced it would rebrand Mystery TV to become Crime & Investigation (CI) and Twist to become FYI in the coming months, both aiming to zero-in on that female demo.

The evolution of Twist follows a similar change by the channel's U.S.-based owner, and will now feature a take on food, lifestyle and fashion that targets millennials.

Shaw Media's most successful specialty channel targets men as well as women, with History reaching a 60/40 split. It sits in the number two spot with adults 25 to 54, pulling big numbers with its original series *Vikings*, which brought in an average of 900,000 viewers to its first season this spring.

Bell Media has been building out an individual strategy for each of its specialty channels one by one since Catherine MacLeod, SVP of specialty channels and Bell Media Production, came into the role in 2011.

"In a pick-and-pay world all the channels will potentially suffer subscriber loss," she says. "But the notion is building channels with programming that people want to see. Original programming is becoming more important because then you can bring viewers to a show they can't get anywhere else."

It was quality programming that accelerated the

The logo for the Space TV channel, featuring the word "space" in a white, lowercase, sans-serif font. The text is positioned within a blue circular shape that is partially cut off at the bottom, creating a semi-circle effect.

**"IT'S GREAT TO SEE
CANADIAN-MADE PROGRAMMING
LIKE ORPHAN BLACK BECOME A
GLOBAL PLAYER, ESPECIALLY SINCE
IT FEATURES SUCH A STRONG
FEMALE CHARACTER."**

KAITLYN BULLEN

MAXUS. CHANNEL PLANNER AND SPACE VIEWER



ORPHAN BLACK - TOP 10 NON-SPORTS SPECIALTY SERIES WITH W25-54.

BELLMEDIASALES.CA/SPACE



WHO'S WATCHING WHAT

A ranking of the top 10 specialty channels in Canada from December 2013 to the end of May 2014 for adults 25 to 54, averaged over 24-hour periods:

1. TSN
2. History
3. Discovery
4. Sportsnet National
5. W Network
6. HGTV Canada
7. Space
8. Showcase
9. YTV
10. Food Network Canada

The top 10 specialty channels for adults 18 to 49:

1. TSN
2. History
3. Sportsnet National
4. Discovery
5. W Network
6. YTV
7. HGTV
8. Space
9. Treehouse
10. Teletoon English

Source: BBM Canada



Clockwise: Channels are hoping to increase their viewer potential with shows like *The League* on FX Canada, *Vikings* on History and *Orphan Black* on Space.



rebranding of Space, says MacLeod. The channel was given a reboot last spring when the now hit show *Orphan Black* was launching its first Clone Club-targeting season (see p. 31 for more on the show's marketing strategy). The channel currently sits at seventh place overall in the specialty rankings.

The channel has also seen record viewership numbers for other shows, with the recently renewed *Bitten* pulling in an average of 348,000 viewers to its Saturday night time slot.

FX Canada and FXX are the two main non-sports specialty focuses for Rogers Media heading into an era of increased consumer choice, says Hayden Mindell, VP

television programming and content at the company. Neither channel currently ranks in the top 10 in terms of average viewership from 25- to 54-year-olds. But both seek to target an audience of young men, aligning well with the company's slate of NHL-heavy programming on City.

Eric Schrier, president of original programming and productions at FX Networks, says both channels are still in their expansion phase, currently sitting at 17 original shows across the two, with expectations to hit 20 programs in the near future.

Mindell says the channels will be promoted using Rogers Media's other assets, including its upcoming

slate of NHL hockey programming in order to help grow the brands of the two channels, with FX Canada targeting adults 18 to 49 and FXX Canada skewing a bit younger, aiming for 18- to 34-year-olds.

"They are our main focus on specialty and will be part of a huge focus this summer in terms of promotion," he says.

Mediacom's Neale says specialties with telco owners would be wise to incentivize their niche channels, looping them in with other services like internet or mobile to encourage keeping the channels on their monthly bill.

He adds that the irony of the increased choices offered by pick-and-pay is that if consumers have access to a more streamlined slate of channels they have chosen to pay for, they might be less likely to cut the cord and move over to other OTT players. Not the neatly-tied ending broadcasters might be hoping for, but with the control of content being placed squarely in the hands of consumers, the adventures are only just beginning.

SPECIALTY TV BY THE NUMBERS

Specialty TV services (which are coupled with pay and pay-per-view in the CRTC reports) made **\$4 billion** for the first time last year, with specialty alone bringing in **\$3.3 billion** of that total amount. Money to these services has been rising at a rate of **7%** over the past five years, according to numbers from the CRTC.

The vast majority of that revenue came from subscribers, with **\$2 billion** from cable subscribers and **\$740.2 million** from satellite subscribers. The advertising share broke down to see **\$1.3 billion** from national advertising and **\$29.3 million** from local advertising, with **\$69 million** from other sources.

Category growth for specialty compounded at a rate of **9.5%** from 2002 to 2012 compared with conventional, which only grew by **0.6%**, according to data from GroupM and the RBC Media Spotlight provided by Mediacom Canada.

Ad dollars going to the channels are also up, moving from **20%** in 2002 to **36%** in 2012.



space

"THE STATION CONTINUES TO SEE SIGNIFICANT GROWTH, ESPECIALLY WITH FEMALE AUDIENCES. SPACE IS NOW A TOP PICK FOR OUR CLIENT'S CAMPAIGNS."

KERWIN GOUVEIA

ORION TRADING

MANAGER, MEDIA INVESTMENTS AND SPACE VIEWER



SPACE IS #1 IN AUDIENCE GROWTH WITH W25-54.

BELLMEDIASALES.CA/SPACE



NEW ON THE SPECIALTY DIAL

FOOD FIGHT Food trucks compete against each other in the new show *Food Truck Face Off*, hosted by former NFL quarterback (and former *Bachelor* star) Jesse Palmer on Food Network Canada.



Taking food testing to the local county fair is Food Network Canada's new *Carnival Eats* (pictured), which looks at the outrageous foods featured at exhibitions across the country and the personalities who create them.

Canadian eating gets multi-platform with Shaw Media's upcoming *The Great Canadian Cookbook*, which promises to give Canadians a forum to post and share recipes online, with a broadcast special featuring some of the national cooks coming next winter on Food Network Canada.

Corus' W Network is hoping to place a foot firmly in the food category with the launch of *Million Dollar Critic*, which follows British restaurant critic Giles Coren around North America as he tries out the local fare and hands down his opinions (which have been known to make or break restaurants).

BACK IN TIME Showcase is headlining its fall schedule with *Outlander*, which is based on the best-selling novels by Diana Gabaldon and starts on Sunday, Aug. 24. The show will follow the story of a combat nurse from 1945 who is swept back in time to 1743 and forced to marry a young Scottish warrior.

SEARCHING FOR DINOS History will be following paleontologists from Alberta's badlands to the Bay of Fundy in the upcoming multi-platform *Dino Hunt* series next winter. The show features an interactive component, with the dinosaur found in the series

eventually brought to Toronto's Royal Ontario Museum and portions of the coverage being streamed online at History.ca.



A TWIST ON VAMPIRES Aiming to tell the vampire myth story from a new angle, Oscar-nominated director and producer Guillermo del Toro produced *The Strain* (pictured above), which bows July 13 on FX Canada. The show follows the head of the Center for Disease Control Canary Team in New York City as he and his team investigate a mysterious viral outbreak.




BRINGING A NEW AUDIENCE TO FXX The traditionally male-focused FXX aims to also attract women with two new comedies, both launching this summer; *Married* (pictured above) and *You're the Worst*. Both shows start on July 17, with *Married* attempting to give a painfully honest look at marriage and *You're the Worst* showing two of the most horrible people you will ever see on TV who meet and fall for one another.

DRAMA COMES TO E! Bell Media's reality-focused channel is getting its first injection of scripted drama with the launch of the Elizabeth Hurley-starring show *The Royals* (pictured below), which starts mid-season. Hurley plays the Queen of England whose son (the prince) starts dating one of her American staffers.



NEW COMEDIES FOR COMEDY Bell Media's MacLeod says she was impressed with the offerings of the laughers at the L.A. Screenings. Comedy picked up some of her favourites of the bunch like *Buzzy's* (pictured above), from the creators of *Will & Grace*, which follows barbershop owner George Wendt and his staff at a small-town hair shop. Also joining the channel is police procedural spoof *Angie Tribeca*, which stars *Parks and Recreation*'s Rashida Jones in the title role.

SUPER KIDS YTV has three new shows coming this fall that put kids in the hero seat, with *Henry Danger*, *Max & Shred* and *Looped* all featuring an element of the extraordinary. *Henry Danger* follows the adventures of a sidekick-in-training to Captain Man. *Max & Shred* is a buddy comedy that chronicles the tales of a superstar snowboarder as he moves in with anxious academic Alvin and his family. *Looped* takes a page from *Groundhog Day*, with best friends living the same Monday over and over again. 

EXTEND YOUR REACH

Connect with over 11 million households across the country. Featuring strong movie blocks and original programming, including the critically acclaimed *Blackstone*, APTN keeps Canadians entertained.

For advertising opportunities, please contact our sales team.

Aimee Powell
Director of Sales
apowell@aptn.ca

Andrew Kumpf
Manager of Sales
akumpf@aptn.ca

Visit aptn.ca/reach



THE NATIONAL* FALL TV SCHEDULE 2014/15

Mon.	8:00	8:30	9:00	9:30	10:00	10:30
CBC	Murdoch Mysteries		Strange Empire		The National	
City	2 Broke Girls	Mom	Scorpion		2 Broke Girls	Two and a Half Men
CTV	Gotham		Forever		Castle	
CTV Two	The Voice				Anger Management	Mike & Molly
Global	NCIS: Los Angeles		Sleepy Hollow		The Blacklist/State of Affairs (November)	
Tues.	8:00	8:30	9:00	9:30	10:00	10:30
CBC	Rick Mercer Report	This Hour Has 22 Minutes	The Honourable Woman		The National	
City	Utopia		New Girl	The Mindy Project	2 Broke Girls	Two and a Half Men
CTV	The Flash		Marvel's Agents of S.H.I.E.L.D.		Person of Interest	
CTV Two	The Voice		The Goldbergs	Anger Management	Anger Management	Mike & Molly
Global	NCIS		NCIS: New Orleans		Chicago Fire	
Wed.	8:00	8:30	9:00	9:30	10:00	10:30
CBC	Dragons' Den		Republic of Doyle		The National	
City	Hell's Kitchen		Modern Family	Black-ish	2 Broke Girls	Two and a Half Men
CTV	Arrow		Criminal Minds		Grey's Anatomy	
CTV Two	The Mysteries of Laura		Law & Order: SVU		Anger Management	Mike & Molly
Global	Survivor		Chicago P.D.		Stalker	
Thurs.	8:00	8:30	9:00	9:30	10:00	10:30
CBC	The Nature of Things		Doc Zone		The National	

City	The Bachelor Canada	Scandal		2 Broke Girls	Two and a Half Men
CTV	The Big Bang Theory	The Millers	The McCarthys	How to Get Away with Murder	
CTV Two	Vampire Diaries	Reign		Anger Management	Mike & Molly
Global	Bones	Gracepoint		Parenthood/Elementary (November)	
Fri.	8:00	8:30	9:00	9:30	10:00 10:30
CBC	Marketplace	Rick Mercer Report (R)	The Fifth Estate	The National	
City	Package Deal	The Middle	Utopia	2 Broke Girls	Two and a Half Men
CTV	The Amazing Race		Grimm	Blue Bloods	
CTV Two	MasterChef Junior		Shark Tank	Anger Management	Mike & Molly
Global	About a Boy	Marry Me	Hawaii Five-0	Border Security/Constantine (October)	
Sat.	8:00	8:30	9:00	9:30	10:00 10:30
CBC	Hockey Night in Canada				
City	Hockey Night in Canada				
CTV	Comedy Night on CTV				
CTV Two	Flashpoint (R)		Motive (R)	W5 (R)	
Global	Crime Time (R)			Parenthood (November)	
Sun.	8:00	8:30	9:00	9:30	10:00 10:30
CBC	Canada's Smartest Person		CBC Selects	The National	
City	NHL			Revenge	
CTV	Once Upon a Time		Resurrection	CSI	
CTV Two	Dancing with the Stars			Anger Management	Mike & Molly
Global	Madam Secretary		The Good Wife	The Simpsons	Family Guy

*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. (R) repeat episode

WIN BIG

THE
**BIGGEST
LOSER**

THE
X
FACTOR

**WHEEL OF
FORTUNE**

JEOPARDY!

**FAMILY
FEUD**

FOR SALES CONTACT:

GROUP OF SEVEN MEDIA
JEREMY MORTON
PRESIDENT
416-803-4515
jeremy@groupofsevenmedia.ca

GROUP OF SEVEN MEDIA
JACKIE BOUDREAU
SENIOR ACCOUNT DIRECTOR
647-668-1134
jackie@groupofsevenmedia.ca

CRAIG KERR
LOCAL SALES MANAGER
905-331-7333 x2206
Mobile: 905-518-2183
ckerr@ctstv.com

JAN DI CLEMENTE
DIRECTOR OF SALES
905-331-7333 x3331
Mobile: 647-200-6374
jdiclemente@ctstv.com

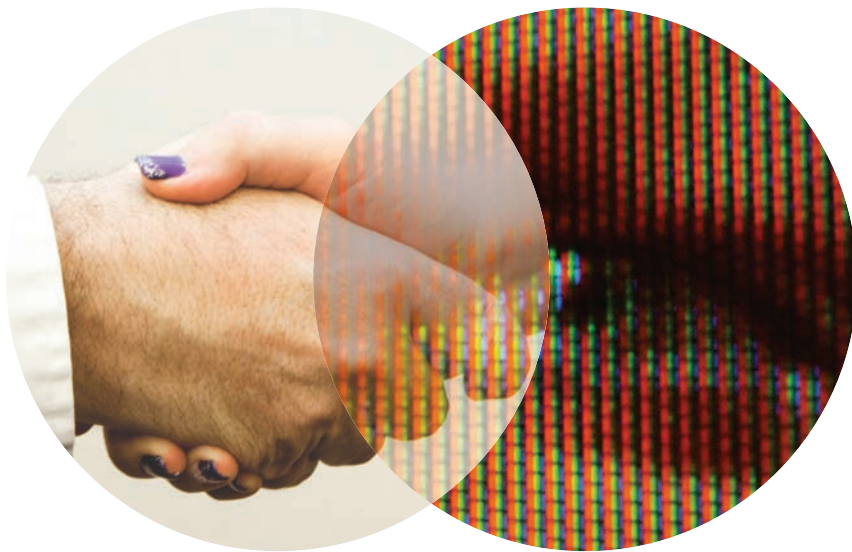
THIS FALL
with



INTRODUCING OUR BIGGEST AND
BRIGHTEST FALL SEASON LINE UP EVER!
CASH IN ON ALL THE EXCITEMENT!

ctstv.com/saleskit





In today's fragmented mediaverse, no brand, channel or media company is an island unto itself – they must bind together with others to create mass audiences and scale. Big events like the Olympics have seen these blockbuster deals for years, first from the consortium between Bell Media and Rogers and then this year with CBC sharing its content

load with other media companies like Rogers-owned Sportsnet in order to provide all the necessary coverage from Sochi. Now these types of deals are happening among the digital players.

THE NEW PARTNERS

Going into their third year now, the Digital NewFronts have brought their own breed of deals to market. This year they made headlines with handshakes between AOL Canada and GroupM, and Yahoo! and Live Nation, the latter pair announcing they would air one live concert online per day starting this summer.

Before you sign your next deal read about the recent ones in the content space as we run down the newest partners in Canadian media.

BY VAL MALONEY

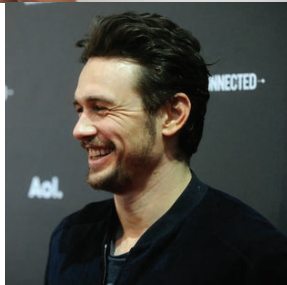
AOL and GroupM

The digital original programming market is picking up speed in Canada, but most agencies didn't have a shot at AOL Canada's slate of 16 U.S.-produced shows because they were purchased in full by GroupM before the media co even previewed the trailers at its official New York City NewFront in April. The deal was a result of AOL looking to sell the slate from a more mature sales strategy than last year, according to Dana Toering, head of revenue for AOL Canada.

"We set up meetings with our key partners and showed them our slate behind closed doors," he says. "GroupM immediately stepped up, and within minutes of finishing their presentation, expressed interest in owning the rights to the entire slate of original productions. We put together a deal and signed off on it within 24 hours."

Toering says demand for digital video has been very strong this year, with shifts in viewer habits finally getting noticed and backed by serious dollars.

Money to partner with AOL Canada around its slate of "Originals," including talent and producers such as James Franco, Ellen DeGeneres and Sarah Jessica Parker, will not be moved from investments in other platforms like TV, says Stuart Garvie, CCO of Canada at GroupM, who



Counter-clockwise from top: Shows from artists like Justine Ezarik and James Franco make up this season's slate of AOL originals; Yahoo! plans to air a daily concert from Live Nation; YouTube personality Rosebud143 and Blue Ant Media's Raja Khanna.

helped arrange the deal with AOL Canada.

"The market has started to mature past the either/or arguments for TV and digital," he says. "You need to be careful of throwing the baby out with the bathwater – content on TV right now is as good as it has ever been. There are more conversations about how things are working together rather than TV being dead."

Yahoo! and Live Nation

At its NewFront this spring, Yahoo! announced it would air a concert each day from Live Nation on Yahoo Live this summer. Ned Brody, head of Americas, Yahoo!, says the deal is the evolution of a program

the brand started last fall when it live-streamed concerts from Katy Perry and One Direction, and saw audience numbers increase with each presentation. "The deal with Live Nation was a big cheque to write but it also has the potential to have a lot of impact. There are very few times that you can do something that changes the way people do things, but there was a lot of opportunity to disrupt the industry with this."

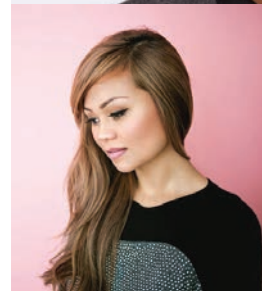
Will Pate, VP of digital at M2 Canada, says the Yahoo! deal gets some of the attention audiences are paying towards live events without "getting in the much more difficult waters around sports."

"I suspect there wasn't a long lineup at the door for Live Nation the same way there would be for major league sports rights. I think Yahoo! found something that was undervalued and found a way to take it to digital in an interesting way. This raises the question for other digital partners; what other pieces of the live experience can they bring to life on the web?"

Music and sports are two big ones but there are many more, like sports that are popular with more niche communities. This blows the doors open and I would like to see much more serious thinking about how digital companies can bring these deals to life."

While hesitant to state audience expectations, Brody says Yahoo! is hoping to draw numbers far greater than those at the live venues. He adds that sponsors, of which there are four who have signed on in the U.S. (Canadian ad models hadn't been disclosed at press time), will have the power of suggestion but not selection of the artists around which their content will appear.

The partnership also has benefits for the artists showcased, who typically make money touring more than through record deals. "We want Yahoo! to be the place that users go to see live content," he says. "I think you will be seeing an increasing number of partnerships between content and distribution companies."



Blue Ant Media and Omnia Media

Earlier this spring, Toronto-based Blue Ant Media increased its stake in the digital landscape when it announced it would partner with music-focused Omnia Media, a YouTube multi-channel network, with plans to eventually own it.

The deal gives Blue Ant exclusive rights to L.A.-based Omnia's programming slate from 650 music artists and gamers, such as Tyga, The Weeknd and Wyclef Jean, as well as access to its over 40 million YouTube subscribers and 100 million fans on Facebook.

"This deal made sense because YouTube has incredible reach but doesn't yet have a fully scaled monetization model. But the audiences are there," says Raja Khanna, CEO of TV and digital for Blue Ant Media.

"We thought one way to get into this game was to partner with creators who already have content to combine it with our original shows."

Since announcing the deal, Omnia and Blue Ant have signed with Budweiser and Scene as sponsors of the musical content network.

Khanna says the partnership is the latest in a series of strategic moves to increase Blue Ant's presence online and in digital video.

The media co also recently unveiled its new Blue Ant Studio, a street-level production hub for Canadian YouTube talent to come and work.

"One of my concerns in Canada is that we don't have a strong enough centre of excellence around the world of online video," he says. "Partnerships are a great first way to build the space and learn. Another step is getting more companies in Toronto to think the way we do about digital video and investing in it in a robust way. We are diving in. The business model is there, and it's emerging and changing."

IPG and Vimeo

Mediabrand Publishing, a production arm of IPG Mediabrand, has signed a deal to partner with Vimeo to commission branded content from its community of filmmakers.

The deal, which will be live in Canada as well as the U.S., means any filmmaker within

the Vimeo community could be approached to create work for one of the agency's clients, such as Coca-Cola and Boston Pizza in Canada, and would be paid upfront for the sponsored content deal.

Content created as part of the deal will be distributed on the video site as well as channels owned by the particular brand. The first client to work with Vimeo on the deal is U.S.-based financial firm Charles Schwab, creating a series of videos around a campaign that will go live this summer.

"We have a directory of filmmakers and are able to source creators based on a brand's need," says Greg Clayman, general manager, audience networks, Vimeo. "Our curation team maintains relationships with a number of filmmakers and is always on the lookout for high quality work, not only for Staff Pick consideration but also just talented creators that could be tapped for brand opportunities."



Canadian Tire and TSN

The sports landscape in Canada hasn't seen as much of a shakeup as it saw in the past eight months in recent (or this writer's) memory, with Rogers Media buying rights to national NHL games and TSN announcing it will launch three new channels to get at the live sports-loving audience. And one brand is taking advantage, going beyond buying ad space to become a content partner.

After noticing what Duncan Fulton, SVP communications, Canadian Tire and CMO, Mark's, FGL Sports, called a noticeable lack of sports content in its mix, the Canadian Tire Corporation signed a partnership with Bell Media's TSN that could include everything from traditional placements to deep-dives into the content space.

"We use sport to

drive culture inside the company, to build the brand externally and as a growth driver. Being relevant in and around sport is exceptionally on strategy for us," says Fulton. "We want to be more present and relevant to audiences who care about sports. That's when the journey moved, from 'quick we need more TV', to 'quick we need more content'."

Fulton says the three-year partnership will enable the company to make content plays ranging from its upcoming Instagram-centric campaign with the Toronto Raptors to branded content like the show it did with the CBC and NHL star Jonathan Toews ahead of the Olympics.

"A simple example of the kinds of pieces we will be creating in the deal came when we were close to closing it and were taking a group of kids from Jumpstart to game seven of the Toronto Raptors playoff match. We got a video team to capture the excitement around it. TSN interviewed the group on the court, because we didn't have access inside the team but TSN did. They created a two-minute video that they posted online on its newly-launched site BarDown and we used it on our Twitter and Facebook pages. We have created the latitude to do a lot of things with this deal, we are really only limited by the creativity of our two teams."

Right: Canadian Tire's Duncan Fulton and TSN's Cabbie with Jumpstart participants at a Toronto Raptors playoff game. **Below:** Vimeo content could become lucrative for its creators thanks to the IPG deal.



THE ENDORSEMENTS THAT SPEAK VOLUMES

For more information and product submission visit:

chatelaineinstitute.com

— and —

todaysparentapproved.com

Marque da Silva: 416.764.3994
m.dasilvalandell@rci.rogers.com

Whitney Grove: 416.764.2845
whitney.grove@rci.rogers.com

Benefits Include:

- Logo and Product Endorsement • Product Specific Research • Multi-Media Promotion



© 2014 Rogers Publishing Ltds. Chatelaine is a registered trademark of Rogers Media Inc. Today's Parent is a registered trademark of Rogers Media Inc. The Chatelaine Institute Approved program is a registered trademark of Rogers Media Inc. The Today's Parent Approved program is a registered trademark of Rogers Media Inc.
*Approved based on quality, ease of use and value for money.

**You
could
use
more
strategy**

INTRODUCING
strategydaily

Do you get it?

Joining the ranks of *stimulant*, *Media in Canada* and the *Shopper Marketing Report* - *strategy* now also delivers a daily dose of innovation, trends, research and the news you need to know about.

> To subscribe, visit strategyonline.ca/subscribe.

Advertise to over 21,000
marketing professionals <

For more info contact:

Neil Ewen P 416-408-2300 ext 248

E newen@brunico.com

Kelly Nicholls P 416-408-2300 ext 444

E knicholls@brunico.com

strategydaily  

SPONSORED SUPPLEMENT

AD DOLLARS ARE
FOLLOWING THE FLOW TO

ONLINE VIDEO



Canadians have a voracious appetite for online video. Video viewership in this country has been growing by double digits each year since 2011. Last year, ComScore's Video Metrix reported that just shy of 92% of Canadian internet users watch videos online, putting Canada in the number two slot just behind Argentina in terms of online video penetration globally.

Those numbers have understandably fuelled strong advertiser interest in the medium, making video the fastest growing online ad

format. Canada's digital video ad spend, according to eMarketer, is projected to reach more than \$239 million this year and to climb to a whopping \$360 million in 2016.

PwC says internet advertising is growing at a faster pace than other media in Canada with revenues expected to reach nearly \$7.2 billion in four years. In its most recent Global Entertainment and Media Outlook, PwC projects spending in online video advertising alone will grow from \$209 million in 2013 to \$803 million in 2018, with

a compound annual growth rate of 30.9%.

Grant Le Riche, managing director of TubeMogul in Canada, says online video presents a lot of opportunities for brands and advertisers - and a lot of challenges too. "In the past you put your money into TV and reached huge amounts of people, pretty much everyone. You're still going to reach a massive audience with TV but there are now chunks of people you're not going to reach at all. They are beginning to migrate over to viewing video using other platforms. Brands

/marketplace

Launch video advertising campaigns like magic

In Q3 2014, SourceKnowledge will launch a cross-device RTB video advertising platform that will bring advertisers the ultimate in ease of use, transparency and cost efficiency.

Request Early Access

sourceknowledge.com/marketplace

are following that trend - and we see it in the ad spend. It shows the shift in behaviour and it has big potential for advertisers."

Advertisers are attracted by the targetability and transparency of online video as well as the audience verification expertise now available. Stuart MacDougall, chief technology officer at SourceKnowledge, says that while the process of verification and determining how long people are actually viewing online video ads is more complicated than with display ads, overall it's more precise than TV. "TV is traditionally sold by GRPs, which is a difficult metric to read. If you're on TV and targeting content like *Big Bang Theory*, you're going to say you're hitting about 20% of your target audience. I think digital is a bit more precise. Nielsen, ComScore

You're still going to reach a massive audience with TV but there are now chunks of people you're not going to reach at all.

and other research providers are offering GRP-like metrics for traditional TV advertisers to bring them over to online video. Overlaying that with the digital technology the online industry has been using for 20 years makes that even more accurate."

Beyond ad skipping, fraud is a problem widely acknowledged by the industry, so to avoid the trap

Continued on page S54 ►

GLOBE AND MAIL'S AGGRESSIVE VIDEO PUSH PAYS OFF IN UPSCALE AUDIENCE

There are still many challenges in the market when it comes to marrying audience and behavioural targeting to online video delivery. However, the big buzz at the digital NewFronts in New York in May was around publishers introducing original programming. *The Globe and Mail* is no exception.

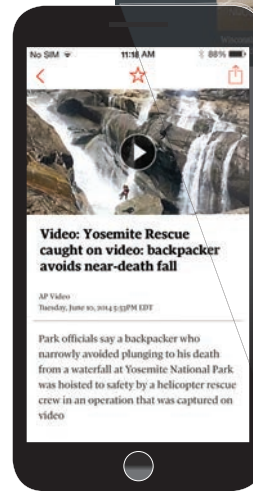
Andrew Saunders, the *Globe's* chief revenue officer, explains that what we're seeing is the evolution of publishers becoming more like broadcasters, creating, pushing out and distributing content. Publishers know who their readers are and by producing the quality content they're looking for can provide targeted contextually-aligned advertising vehicles - whether by theme, lifestyle or gender.

"We've been aggressively focused on video for the last several years. We have 3-million unique streams occurring on a monthly basis," says Saunders. "Recently we launched *Globe Now*, a daily news show posted every Monday to Friday around noon. That content - 60 or 90-second clips on topics such as business, technology, lifestyle and the arts - is served across all our digital platforms. The benefit for marketers is they know what they're getting."

The *Globe* is a very targeted destination for advertisers going after an affluent and influential audience, and Saunders says their video strategy further differentiates the positioning. "The approach of delivering *Globe Now* at a set time each weekday and leading with a thought piece or discussion on a current issue, rather than just delivering a breaking news item, sets us apart from most other news video."

When it comes to effectiveness, Saunders says the *Globe's* video content delivers longer time on page and higher daily repeat visits than average engagement metrics. One of the most compelling video advertising stats is that the *Globe's* pre-roll ads have an average completion rate of 86%. Industry averages range from 60% to 67%, according to DoubleClick.

The *Globe* has also invested heavily in its ad technology infrastructure, including audience targeting expertise that leverages behavioural third-party research with its first-party data. Saunders says, "We are giving the advertiser community a platform to connect in an engaging way with our audience, but we can also provide better insight and better direction on reaching them. Our



Globe mobile and app platforms offer a wide range of video content and advertising opportunities.

***Globe Now* reaches an engaged, affluent audience across web, mobile and app platforms.**

ability to understand engagement and potential alignment is equally as important."

The *Globe* offers expanded sponsorship on *Globe Now* that includes mid- and post-roll ads plus opportunities to extend reach, and targeted, relevant scale through the *Globe Alliance* publisher partnerships. Through the Alliance, the *Globe* reaches 9.7 million Canadians on a monthly basis, an audience that is engaged, affluent and well-educated.

Saunders says the *Globe Alliance* is not like a typical network, the media brands under the umbrella, which are all prestige publishers, operate more like a true partnership, as the name suggests. "The partners we've chosen are predetermined, we know a lot about them and we know their inventory. The buy is seamless, a single point of contact."

Saunders explains that when a marketer wants to extend a campaign across the Alliance partners, "we do the same level of targeting and run contextual alignments in the same way we do with owned and operated properties." This curation approach allows advertisers to amass audience scale without impacting engagement, while the data and ad tech investment enables the online video publishing platform to be more surgical than broadcasting.

TUBEMOGUL FOCUSES ON TOOLS TO DRIVE ENGAGEMENT, AWARENESS AND PURCHASE INTENT

Marketers are now taking more ownership over their online video advertising and thanks to companies like TubeMogul, they have everything they need to plan, buy, optimize, measure and analyze campaigns.

The TubeMogul toolbox includes more than 10 targeting options ranging from demographics and context to devices and daypart. A popular component of the platform is BrandSights, a customized survey tool that allows advertisers to generate actionable consumer insights in real time to get a handle on brand metrics such as awareness, favourability and purchase intent.

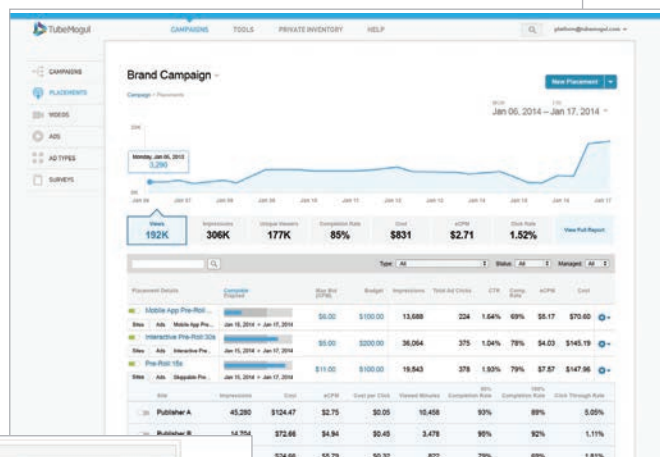
"Marketers can now do pretty much everything on one platform that they used to have many different agencies and many different people do. Advertisers are in control, but we also offer full support and can jump in at any time to advise and assist," says Grant Le Riche, managing director of TubeMogul Canada.

One of the areas they focus on is the hot button issue of online ad fraud. In April of this year in the US, TubeMogul reported that it had identified three sophisticated bots that were generating at least 30 million fake online video ad views each day. Bot-infected computers can make a single computer look like 1,000. They also taint cookie data by planting fake target segments that drive advertisers to scam sites. At that time, comScore figures indicated that 36% of traffic was generated by infected machines.

TubeMogul has been at the forefront of combating online ad fraud and has built several accountability and verification tools designed to protect brands from these scams. The Open Video View (OpenVV) code is open-source technology for measuring video ad viewability to assure advertisers that humans are actually viewing their video. It works across all online networks, exchanges and marketplaces.

BrandSafe is TubeMogul's software that safeguards brand equity by keeping ads from placement on objectionable sites. It examines sites and individual pages in addition to blocking suspicious sites, fake pre-roll and botnet infected sites.

"Our focus on transparency is important because if you don't know what you're buying, it poses a risk not only for campaign performance but also for your brand. Every site on the TubeMogul platform has been manually screened by actual people and categorized into our three-tiered BrandSafe structure. Advertisers choose the tiers they're comfortable running on and can select sites before, and even during, a campaign."



TubeMogul Viewability Technology

Developed by TubeMogul and supported by over 20 industry partners, its Open Video View (OpenVV) code is an open-source technology that gives brands actionable insight as to why their ads weren't seen.

TubeMogul Platform

TubeMogul's platform offers an integrated approach for programmatic video buying. Its advertising software allows brands to simplify the media buying process, unify inventory and verify the success of their campaigns.

TubeMogul has access to approximately four billion pre-roll impressions a month in Canada across thousands of publishers offering a wide

range of inventory. Putting that in perspective, TubeMogul reaches 85% of the online audience in Canada, about 21 million unique viewers each month according to comScore. Pre-roll has become the accepted standard but TubeMogul's research last year found that adding an interactive component leads to even higher brand awareness, 10.6% from 7%, and increases purchase intent from 4.4% to 9.9%.

Le Riche says TubeMogul is the leading advertising software company for digital branding; with 16 offices in eight countries and more than 300 active clients across 30 countries - the company buys in 72 countries and offers marketers global scale, technology and support. Also, the TubeMogul global team speaks a total of 12 languages and provides access to local language inventory and local language browsers. That means advertisers achieve reach, scale and context.

"The world's largest brands and agencies look at us to unify their video advertising through our platform," says Le Riche. "That's because we reduce the complexity of the media buying process and improve the transparency. We shift all transparency, accountability and verification to the brands."

◀ Continued from page S52

of fraudulent clicks and having ads channeled to scam sites,

advertisers are working with premium networks and ad serving platforms. They are also taking advantage of third-party audience verification through Nielsen OCR and comScore VCE services as well as the expertise of the content providers and platforms they work with.

Andrew Saunders, chief revenue officer for the Globe and

Mail, says companies like the Globe are now able to provide better insight and direction to advertisers about who is consuming what content, on what platform and in what contextual environment. "We've invested heavily in targeting with behavioural third-party research and leveraging that with our first-party information as well. That's the audience targeting capability, and we're doing that, but I also think the ability to understand engagement and potential alignment and context is equally as important."

"That's where quality publishers and content providers play a critical role. You know the ad's going to be viewable and in a protected environment, and you know it's going to be optimized appropriately to give marketers the best return on their investment rather than a 'spray and pray' approach."

Continued on page S56 ▶

AOL VIDEO

Home of AOL Originals



PREMIUM CONTENT

The most comprehensive library of premium online video across desktop, mobile, tablet and connected TVs. Home of AOL Originals video series, including #Candidly Nicole, Hardwired, iJustine & more.



VIDEO SYNDICATION

Editorial, contextual & social content syndication across 40,000+ premium publisher network.



PROGRAMMATIC

Now introducing Adap.tv, the world's most advanced premium programmatic video & TV advertising marketplace.

AOL AMPS UP ITS CONTENT ARSENAL, PROGRAMMATIC AND SYNDICATION



HARDWIRED 2.0
with iJustine

Making a
Scene with
James Franco



Although cat videos are still a big slice of the internet pie, the world of online video has exploded well beyond user-generated feline films, spawning a growing demand for quality programming. As the audience expands and becomes accustomed to more sophisticated fare, AOL has been at the forefront of this revolution, working to provide quality content and value for advertisers.

Jon Hales, head of video sales for AOL Canada, says the focus has been on connecting all components of the online video environment, from

content creation to programmatic buying and syndication. The result is AOL's premium video network, AOL On, home to some of the web's top streaming shows, and new programmatic and syndication platforms.

Fifteen original video series will launch this fall via AOL On at on.aol.ca as well as across AOL Premium properties such as The Huffington Post Canada, Parentdish.ca, Kitchen Daily Canada and StyleList Canada. Ten are new shows with some big names tied to them, including James Franco, *Making a Scene*; *My Hero* with Zoe Saldana; and Kevin Nealon with *Laugh Lessons*, which he co-produced with Ellen DeGeneres. The new roster joins several shows that premiered last year which did extremely well and are coming back for season two, most notably *City Ballet* with Sarah

Jessica Parker and *#Candidly Nicole* starring Nicole Richie.

Hales says, "*#Candidly Nicole* did tremendously well in both Canada and the US. We'll be premiering our 20 new episodes online starting in the fall. The series has also been picked up for TV by VH1. One of the great things about the stars of the AOL Originals is their social footprint. For example, Nicole Richie drove 500,000 viewers to *#Candidly Nicole* simply by promoting episodes via her social network."

MAKERS, an original AOL multi-platform initiative will also be launched in Canada this fall. Based on the US program that launched two years ago, the Canadian version starts with 12 episodes that tell, discover, recognize and share the stories of trailblazing Canadian women.

GroupM has cut a deal to be the exclusive sponsor of the 2014 slate of 15 AOL Originals series, including *MAKERS*, giving clients of its Mindshare, Maxus, Mediacom and MEC agencies access to all the ad slots for the season.

On the programmatic side, late last year AOL purchased Adap.tv, the world's largest video ad platform. Adap.tv connects video buyers and sellers directly, allowing for full transparency, quality control and cost-efficient reach and scale.

Another of the trends AOL is involved in right now is branded video. Hales says clients are looking to the company to help create video content that complements their brand advertising, which AOL serves up through its new Be On syndication platform. "This is video that brings the brand into the conversation," says Hales. Be On embeds the brand content video, focusing on the topic and conversation the marketer wants their brand to be associated with.

Across the Be On platform, AOL has over 40,000 publishers in its network, and beyond branded video content, publishers will also do additional editorial around the video, for which the advertiser pays on a cost-per-view basis. Hales points out that Be On is a pull model in which viewers make the choice to engage with and watch the content. "This targeting breeds brand favourability, world-leading clickthrough rates as well as the ability to syndicate from multiple sources." Hales adds that Be On delivers "fantastic additional earned media opportunities when publishers push the video onto their social media platforms."

◀ Contined from page S54

Research is also helping marketers understand how to use the medium more effectively. Last year at the Audience Measurement 8.0 conference in the US, AOL released a report called "Maximizing the online video viewer and advertiser experience", a study designed to help advertisers communicate more effectively with consumers within online video environments.

Right now online users are mainly watching short rather than long-form online video, particularly on their mobile



devices, but the shift to long-form content is beginning as a higher quality of online programming becomes available and as more consumers start to view their favourite programs via connected TV.

Jon Hales, head of video sales for AOL Canada, says the company's research shows that the length of the content has an impact on whether the viewer is willing to engage with it. "We found out that if they're watching long-form

Continued on page S58 ►

Don't make an
IMPRESSION.
- Make -
3 MILLION.



**GLOBE VIDEOS RECEIVE OVER
3 MILLION VIEWS EACH MONTH**

Globe videos enjoy an average completion rate of 86%, which means advertising with Globe Video, Globe Now and our Alliance partners ensures your brand gets its moment in the spotlight as our highly-engaged audience seeks out premier news, business and lifestyle content.

Call your Globe representative at 1-800-387-9012 or visit globelink.ca/video to learn more.

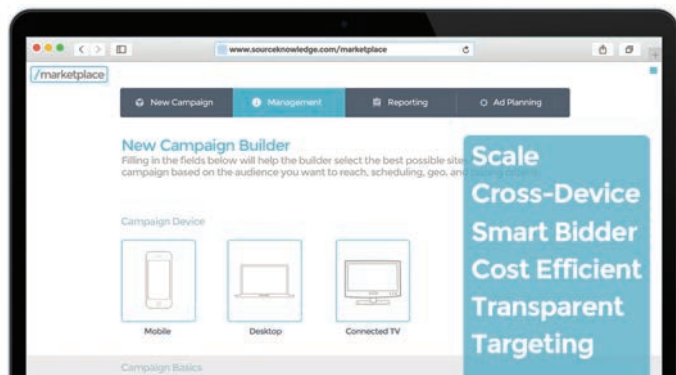


Globe Media Group
where influence lives

Globe Now



Alliance



The SourceKnowledge Marketplace handles over 2 billion auctions per day

SOURCEKNOWLEDGE ENABLES BRANDS TO REACH CORD-CUTTERS AND BINGE WATCHERS

It's a multi-screen world and consumers are viewing video everywhere and anywhere. Since opening its doors in Montreal five years ago, SourceKnowledge has been part of that world, with a focus on enabling brands to take their online video ads to their audiences wherever they are: mobile, tablet, desktop and connected TV.

Hector Pantazopoulos, chief revenue officer at SourceKnowledge, has watched TV ad dollars follow that audience shift over to the digital space. "Watching video online is the same as watching traditional TV but now audiences are watching on a variety of devices. Marketers need to find those viewers, the cord-cutters and cord stackers, and that has sparked the growth of digital video and audience targeting. Really big brands are making the move and they have both online and offline metrics to keep it all in check. They can tell if something is working or not working very quickly."

For example, when SourceKnowledge recently drove awareness for a major car brand across Canada's 18-49 demo, the 15-second pre-roll ad - along with a companion banner - delivered an average 89% completion rate in English Canada and 90.5% in French Canada.

SourceKnowledge, a tech company with an online video advertising platform, is one of the leading programmatic marketplaces in Canada. It reaches over 12 million unique viewers in Canada and 122 million in the US, and its Smart Bidder technology is one of the keys to delivering cost-efficient ad campaigns. Right now SourceKnowledge runs its system as a managed service, but Pantazopoulos says the company is pushing to have a user interface created so clients can do their own buying by the third quarter of this year.

"We want to take that smart bidding technology to the market so advertisers will be able to log in and bid and manage their online video advertising in real time," says Pantazopoulos. "It's obvious the business is becoming more self-serve, and a lot of the data and technology in the online space is going to be utilized more effectively in this type of environment."

In addition to being a leader in the online video space, SourceKnowledge is an authority on emerging technology such as connected TV, thanks to chief technology officer Stuart MacDougall, who has helped position the company for whatever comes next for video advertising. Right now, he says that's connected TV, a technology that has even spawned a new phenomenon - binge watching, devouring complete seasons of television shows in one weekend.

MacDougall says, "Connected TV is a huge area of growth that we're seeing in the early stages in Canada and the US. The technology we've been using in ad tech for 20 years or so, like frequency capping or geo-targeting, is now being brought to bear on connected TV devices. We see a connection among all these things - TV, connected TV, mobile devices and what people are doing on their desktop."

SourceKnowledge already has a head start when it comes to connected TV. Last year the company developed the Movie Chick movie channel for the Roku streaming device and released it in Canada and the US in November. Currently there are over 20,000 subscribers to the channel.

◀ Continued from page S56

video, anything 15 minutes or longer, viewers will engage with a 60-second ad, no problem, knowing they're going to see 15 minutes of content. If they're watching a video on their phone, most viewers will flee if the ad is long because they're concerned about data usage. On mobile, the best ad length is 15 seconds, but when watching connected TV they'll engage with longer ads, while on desktop 30-second is pretty much the norm right now."

The study also looked at the qualities that help to improve consumer opinion of an ad. Audio in video ads is becoming very important because of the amount of multi-tasking taking place when consumers watch any type of video, because if they turn away from the screen they can still hear the ad.

Context is also important for video advertising. Ads should fit the personal interests of the viewer and consumers are even willing to provide basic demographic, brand preference and leisure activity information to get advertising that is pertinent to them. For those brands that interest them, viewers want to see coupons, contests and links in video ads.

Consumers now understand the give and take involved in online advertising and are more than willing to view advertising for content, but they do want to spend that time watching ads that benefit them.





THE ADVERTISING SOFTWARE COMPANY FOR DIGITAL BRANDING.

TUBEMOGUL PUTS BRANDS AND AGENCIES IN CONTROL.

By integrating the ability to buy video inventory in real-time across all devices, in multiple formats on one platform with ad serving, targeting, optimization and brand measurement, TubeMogul simplifies the delivery of video ads and maximizes the impact of every dollar spent.

The world's largest brands and agencies centralize their digital video advertising on TubeMogul's platform because it enables them to make data-driven decisions that lead to better brand results.



SIMPLIFY

Simplify your
media-buying process
for video across all screens.



UNIFY

Unify planning and buying
of TV & video across public
and private inventory.



VERIFY

Verify your message reached
your audience on your chosen sites
and generated brand impact.

Branded entertainment is not an ad

BY JIM KIRIAKAKIS

As budgets for original programming on TV shrink, the opportunity for alternative business models continues to rise, one being brand-funded entertainment.

I use the term “branded entertainment” because I hate the term “branded content” – it’s overused, ill-defined and I feel the idea of content marketing has evolved so much that you can’t use that term and possibly cover everything.

In my opinion, branded content’s main goal is selling, while branded entertainment is inspired by a brand’s philosophy and culture, but created to be authentic, true content a network would commission.

The latter is a tough one to sell to marketers. In the world of ROIs, measuring how a program like this pushes a brand’s share and sales is a difficult task. It requires forward-thinking brands that are ready to take their marketing to a new level.

Branded entertainment is not an ad. Period. It’s a long-term investment in your audience – it’s about engaging and growing a fan base.

Recipe to Riches has become the ultimate example in Canada. Temple Street Productions needed the perfect brand partner to then approach the network (originally the Food Network), and make the idea a reality. Even though President’s Choice is baked into the show, it works as authentic

content because it’s an organic partnership and does a good job balancing brand and audience.

Red Bull Media House (RBMH) is a unique company with the foresight to see the branded entertainment opportunity for what it is. On Buck



The series *McMorris & McMorris* is an example of branded entertainment that focuses on audience over ROI.

Productions’ collaboration, *McMorris & McMorris* (which follows snowboarding brothers Mark and Craig McMorris, pictured above), RBMH provided us with the perfect environment to create a property that thinks about audience – not ROI – first.

Red Bull the drink stays separate from RBMH, which allows the latter to produce content focusing on the lifestyle of the brand, creating authentic television-worthy properties that work and that networks want. This was key in our dealings with MTV Canada when pitching *McMorris & McMorris*. Although MTV loved the brand association with RBMH, the decision to become a part of the financial model and home to the series was based on the concept and reaching MTV’s audience.

We were acutely aware our talent had a huge presence on various social media, which drove our constant authenticity check. We had to create a series that the McMorris brothers and their friends would have no problem legitimately connecting with fans about and promoting via social media. Understanding the importance of that online audience also helped us create

content for them that only the brothers could deliver.

“Authentic,” “audience” and “true content” were words lived and breathed by all of us throughout this process. We would present RBMH creative outlines on where we thought each episode was going and look for their feedback. The McMorris brothers and their friends were 100% engaged and counted on to be a part of creative meetings and brainstorming – we wanted them to be as vested in the telling of their stories as we were, and MTV was there to support us in any way it could, and as one of its trusted producing partners, it let us go out and get it done.

While many will scream from the rooftops that TV is dead, it is still the anchor of many marketing campaigns. Trusted television producers understand the marketplace and can help shape something worth broadcasting and investing in.

We need to continue to encourage and educate brands to invest in this kind of content, giving them more opportunities to stay connected in an ever-changing environment of viewer consumption.



JIM KIRIAKAKIS is a producer, director and head of television at Buck Productions.

Making the message fit the medium

BY LAUREN RICHARDS

As has been evident for years, the ringing of the new TV year is becoming less and less relevant. It was rather shocking to see how long it took broadcasters to recognize the inherent value of launching new shows in the summer, but thankfully due to the success of shows like *Dancing with the Stars*, *American Idol*, *Mad Men* and *The Amazing Race Canada*, even that is now commonplace. And thanks to reality shows, with their water-cooler factor and the live or live-like feeling to them, people aren't as inclined to power-binge six episodes in an afternoon (often skipping commercials).

New shows and new video content is available to viewers daily. So the announcement of the new fall schedules is a bit of a non-event. But upfronts are the time sellers can proudly tout their successes and inform us of their strategic direction – where their priorities are for the coming year. Hopefully that includes greater accountability back to the advertisers.

I am a huge believer in the importance of the environment of a message, that is to say, where it lives. Our ability to retain a message is affected by how many senses are ignited, how much attention you are paying and how much information we're exposed to at a time, above and beyond the creative efficacy. That's why it's important that

different content has different values. But it is a darn shame the media companies selling these "environments," like mobile web or traditional broadcast, haven't done enough to help define the different values of this content. If they believe

pre-roll has more value than broadcast because of the reduced commercial content and the different form of consumption, isn't it fair to expect them to justify these factors?

As an industry, we need to make sure our collective needs are prioritized and communicated. Change won't happen without crystal clear expectations.

And it's a fabulous time to make sure our needs are clear as it relates to targeting. There is a tremendous amount of research data that goes underused that can help buyers and clients fine-tune their television program selection.

By picking a TV show that offers more of your primary target, and ideally reduces the masses you aren't interested

in immersive content your message won't be as "sticky," so relative price becomes a big factor, as does care and attention to your online environment. And as buyers, we can't even fine-tune these program environments in many cases. Then of course, add in the consideration that audience fraud is a major issue in online video content. No wonder I have become a consultant.

With "other" data becoming available – client purchasing data, media company big data and addressable TV becoming more of a major entity (well at least in the U.S.) – our ability to target and improve ROI has become even more complex and our opportunities even greater. The amount of consumer data available from

IT'S A FABULOUS TIME TO MAKE SURE OUR NEEDS ARE CLEAR AS IT RELATES TO TARGETING. THERE IS A TREMENDOUS AMOUNT OF RESEARCH DATA THAT GOES UNDERUSED THAT CAN HELP BUYERS AND CLIENTS FINE-TUNE THEIR TELEVISION PROGRAM SELECTION

in, there is instant improved efficiency before negotiation even begins. There is much more room for a competitive advantage with audience analysis than in "the haggle."

And without even the need to fuse PMB and BBM or ComScore, you can get primary research data through PPM on a myriad of marketing targets. Looking for movie-goers? Well, rather than predetermining the demographic target based on skew, you can go right to the source and buy based on those who are actually going to the movies at least once a month.

And if you are buying video online, of course your targeting opportunities are much greater. In many cases you can serve your messages based on where someone is in the purchase funnel, but it gets tricky. Without the benefit of

some of the global media players, like Google, is quite frankly astounding.

In addition, we are in a really unique position in Canada, with our largest media companies also being communication companies. Used judiciously of course, the consumer behaviour data available on a smartphone, for example, that can be linked back to the household computer and televisions is unbelievably powerful. It's really all a bit mind-blowing, complex and overwhelming.

But to keep us from pouring another scotch or resorting to Valium, let us not forget, at the end of the day, it still comes down to these basics: finding the right audience, at the right time, with the right message.



LAUREN RICHARDS

is a media industry veteran and the founder and principal of consultancy Pollin8.

This year, online ad revenue surpassed that of broadcast TV for the first time ever.

This has made many cats on the internet very rich.

Cossette invites you to see how they spend their money at FilthyRichFelines.ca

PR | MO!

AWARDS | 2014

You came up with the killer idea.
Toiled over execution.
Now it's time to reap the awards.

**Come see Canada's best.
Get your tickets now.**

September 18, 2014 | Arcadian Court

To order tickets visit promoawards.strategyonline.ca
or for group rates contact **Joel Pinto** at 416-408-2300 x650

Presented by

CAPMA  **strategy**



HOLLYWOOD,

HITS & HOCKEY



CITY'S AUDIENCE REMAINS THE BEST OF THE BEST

- ▶ YOUNGER A18-49
- ▶ RICHER HHI \$150k+
- ▶ SMARTER University Educated
- ▶ City's primetime increased 10% among richer audiences

ROGERS | Media
ONECALL
MULTIPLATFORM MEDIA SOLUTIONS

City

BBM Canada, 2013-14 Broadcast Year weeks 5-16, 19-34, excluding Olympic dates vs same weeks last year.
Indexed to 2+ vs national conventional networks. Primetime: M-Su 7p-11p.