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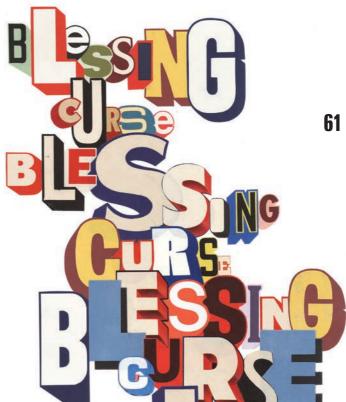
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Gail Belsky is a writer, editor and adjunct professor of journalism at Fordham University. She has written for numerous publications and Web sites, including CBS Moneywatch.com, Health.com, and Philadelphia Inquirer.

Damian Bazadona is the CEO of Situation Interactive, a Broadway marketing agency based in New York City.

Scott Ferber is the Chairman and CEO of Videology. He previously launched and sold Advertising.com to AOL.

John C. Havens is EVP, Strategy and Engagement at Yoxi.tv. He is author of the book, Tactical Transparency: How Leaders Can Leverage Social Media to Maximize Value and Build their Brand.

Former tech blogger and augmented reality developer, Trak Lord is now the Marketing & Media Relations Manager for metaio. For more information about metaio and GAFD, visit www.metaio.com.

Mark Wallace is an author and entrepreneur living in San Francisco. His writing on technology has appeared in The New York Times, Wired and the Financial Times, among others.

Daisy Whitney is a reporter, producer, and podcaster in the new media business. Besides MediaPost, she also writes for Beet.TV and AdAge, among others. She is the author of the novel The Mockingbirds and its upcoming sequel, The Rivals.

MEDIA (ISSN 1533-9475, Publication #020-254) is published four times a year (subscription cost is \$48 per year) by MediaPost Communications at 15 East 32nd Street, 7th Floor, New York, NY 10016. Periodical Postage Rate Paid at New York, NY and at additional mailing offices. POSTMASTER: Send address changes to MEDIA c/o MediaPost Communications, 15 East 32nd Street, 7th Floor, New York, NY 10016. No part of this publication may be reproduced without written consent of the publisher. @MediaPost Communications. Published since 2000 by MediaPost Communications. SUBSCRIPTIONS: Call 212-204-2000, e-mail us at circulation@mediapost.com or write to MediaPost Communications, 15 East 32nd Street, 7th Floor, New York, NY 10016. Issue 113



PUBLISHER

KENNETH FADNER KEN@MEDIAPOST.COM

EDITOR-IN-CHIEF

JOE MANDESE JOE@MEDIAPOST.COM

CREATIVE DIRECTOR & EDITORIAL DIRECTOR JONATHAN MCEWAN

JONNYMACK@MEDIAPOST.COM EDITOR

SARAH MAHONEY

SARAH@MEDIAPOST.COM

ASSISTANT MANAGING EDITOR **CARRIE CUMMINGS**

CARRIE@MEDIAPOST.COM

ART DIRECTOR NATHANIEL POLLARD NATE@MEDIAPOST.COM

ART ASSISTANT JENNY LEE

PHOTO EDITOR

ROBERT BAJNATH

COPY EDITOR

FELICITY BUCHANAN, ERIN EVANS

CONTRIBUTING ILLUSTRATORS & PHOTOGRAPHERS

CUTTLEFISH, PAUL DRINKWATER, GREG GAYNE, HAROLD HINSON, LEWIS JACOBS, PETE SOUZA

MEDIAPOST COMMUNICATIONS

CHAIRMAN

KENNETH FADNER DRESIDENT

JEFF LOECHNER

SALES DIRECTOR, PRINT/ONLINE SETH OILMAN SETH@MEDIAPOST.COM

ONLINE/PRINT SALES MANAGER **NICOLE FADNER**

NICOLE@MEDIAPOST.COM

ONLINE/PRINT SALES ASSOCIATE SAM BUCCIERO
SAMANTHA@MEDIAPOST.COM

VICE PRESIDENT EVENT SALES JON WHITFIELD
JON@MEDIAPOST.COM

SALES EXECUTIVE

LIAM FLEMING

LIAM@MEDIAPOST.COM

DIRECTOR OF CONFERENCE PROGRAMMING **ROSS FADNER**

ROSS@MEDIAPOST.COM SENIOR MANAGER, CONFERENCES & EVENTS

ELAINE WONG DIRECTOR OF MARKETING

ROBERT MCEVILY

MEMBERSHIP AND CIRCULATION MANAGER SERGEI KOGUT

MEMBERSHIP SERVICES REPRESENTATIVE

CHRIS CARNEY
CIRCULATION@MEDIAPOST.COM

Media magazine is published quarterly by: MediaPost Communications 15 East 32nd Street, 7th Floor New York, NY 10016

Phone: 212-204-2000 Fax: 212-204-2038

To subscribe: www.mediapostpublications.com/media Email changes, inquiries, etc. to circulation@mediapost.com

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All the World's a Screen: What's Your Number?

Five. That's how many screens are in my life most days. There's my work computer, my most meaningful LCD relationship. And then there's my laptop, which I drag around on errands and often carry from room to room in the house. Then there's my iPad (my preferred vehicle for Netflix, Facebook Scrabble and a fun app for the gym). I've got an Android smartphone and a plain old TV. (Yes, just one. It migrates from the living room during football season to the bedroom for the rest of the year.)

Toss in all the screens I pay for (those college kids like their laptops, smartphones and TV sets, too), and the numbers shoot up. Now add in all the screens I casually encounter in a day — so far today, that's one at the gas station, one at the supermarket and one at the pet store. I'm well into the teens, and it's barely lunchtime — and I'm a low-tech person!

That's why working with Adam Broitman and John Swords, the big brains behind Circ.us, and the guest editors of the wonderful, 22-page "All the World's A Screen" section of this magazine has been so inspiring. The pair, who have done groundbreaking tech work for such clients as Ben and Jerry's, Cisco, HBO and Red Bull, brought all kinds of creative thinking to this project. Thanks to them, and this oh-so-19th-century magazine you may be holding in your hands, you'll never look at the screens in your life quite the same way.

And by creative, I mean well beyond the usual marketing definition. They've commissioned a great piece of fiction by John C. Havens about augmented reality. Brought in five visuals artists, who have provided a whole new way to look at the use of QR codes, which invite not only visual but also sound and music into the print experience. They've covered the growth of social TV and the many ways in which the future of screens is already here. To experience the ways they've brought all these screen under Circ.us' giant tent, turn to page 45.

Grading By Genre: Our TV Report Card

And for those of you itching for insights into the plain-Jane screen that is regular TV — which let's face it, for most of us, is still sort of the Mother Ship of All Screens — we corralled some of our favorite writers to weigh in on the state of programming. They give us a

report card of how well the world of news, drama, comedy, sports and reality have done this year. Turns out the NFL, the Arab Spring and *Breaking Bad* have been good for plenty of us. (Nor am I the only one dismayed by this century's reinterpretation of *Charlie's Angels*.) They even step a few months into the future, predicting what all of us might see when that circus known as the upfront season comes to town.

On page 40, Stephen McClellan takes

THANKS TO CIRC.US' CREATIVE FEATS AND INSIGHTS, YOU MAY NEVER LOOK AT THE SCREENS IN YOUR LIFE QUITE THE SAME WAY. a closer look at what TV companies and their clients are calling integrated media, the catch phrase for the increasingly nimble ways they are finding to link the 30-second TV spot—still the industry's core currency—across multiple channels. That's not just following soccer fans,

for example, across all their screens. It even includes using your car's GPS to play a video games on your phone, linked to the latest episode of your favorite show.

And don't miss Erik Sass' update on how the digital-out-of-home industry is dealing—or perhaps not dealing—with the still-sensitive issue of facial recognition technology. Scared off by potential legal and privacy problems, marketers have instead focused on the promise of near-field communications, but thanks to Intel, that may soon be changing.

And before you roll your eyes with that, "Who cares — TV is dead" thing, turn to page 37 for Carrie Cummings' insightful Q&A with Magnaglobal's Vincent Letang. Not only can he explain the delicious concept of "video snacking," he predicts an increase of 6.8 percent in TV revenues in the year ahead (or 2.4 percent without the Olympics or the elections). Even better, it's still stealing market share from print, radio and newspapers. At least for now, cancel the wake and head to the circus. \blacksquare

Sarah Mahone y Sarah Mahoney, Editor

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The TV Report Card

What programmers learned about comedy, drama, news, sports and reality so far this year, and what that it means for the coming upfront season BY SARAH MAHONEY

Between on-demand viewing, proliferating screens and ever-fragmenting audiences, we're aware of just how frequently TV gets dissed as a dinosaur medium from a different age. Of course, that's true enough. But it's also true that 290 million of us spend billions of minutes each month sitting in front of that TVasaurus, and this time of year, our eyes get misty. Yes, it's spring, which means that in the weeks and months ahead,

TV programmers will pull back the curtain, giving us a peek at what's to come. In these heady days of anticipation, we get to imagine unexpected wonders.

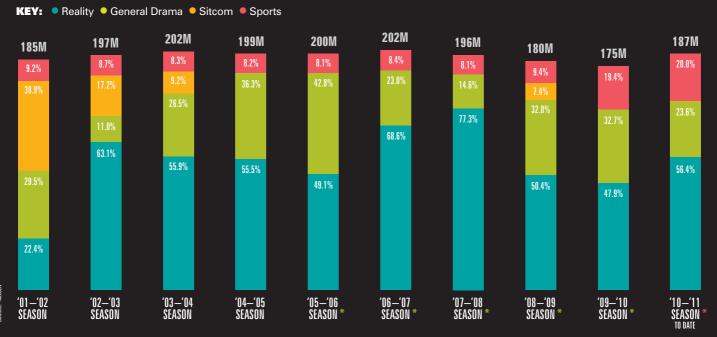
And we do know it's also the season of heartbreak. Some drama can be counted on: This year, we have the presidential election, fueled by as much as \$5 billion in Super PAC ad spending, which experts say is likely to turn our TV sets into a modern version of the Roman Coliseum. And there are the London Olympics. Inevitably, though, the best dramas will be the ones we never hear about, with brilliant shows canceled before the pilot even airs, or unbelievable programming emerging after wacky focus groups as TV execs shake their head in disbelief, only to watch that program turn into this year's *Swamp People*.

And while the decisions that shape the upfront season may seem capricious, they have real impact. Back in 2001, for example, reality programming accounted for just 22.4 percent of programming and peaked at 77.3 percent. Last year, it was up again, as was sports coverage, and — perhaps thanks to the Arab Spring — news programming.

In that spirit of expectation, we asked some of our favorite writers to grade how well drama, comedy, news, sports and reality did last year, as well as make a few predictions about the season to come. Who knows? Maybe if we wish hard enough, this will be the season for *Real Housewives of Downton Abbey*.

SHIFTING TV REALITY

In the last 10 years, America's TV preferences favored reality over comedy. Today, the momentum is shifting back.



^{*} The 2010-2011 season includes the viewership data for the period 9.20.10 – 8.28.11
The data for 2001 – 2009 includes viewership data for the full September – September TV season.

^{*} Data is based on live+7



What to Expect in Comedy SITCOMS MAKE A COMMENT CARD SITCOMS MAKE A COMMENT CARD SITCOMS **COMEBACK**



After languishing for years, America's loving the laughs, especially with strong female leads

lowing a few stiff years, appear funnier than ever.

Though no humorist, Ernest Hemingway held that "a man's got

to take a lot of punishment to write a really funny book." Almost a century later, the same seems true for TV networks, which, fol-

BY GAVIN O'MALLEY



What's working: Funny girls, including 2 Broke Girls, New Girl and Hot in Cleveland



What's not: Whitney. She may be a girl, but she's not that funny

This upfront season, look for: Fewer lawyers and more laughs, as networks shift from aging procedurals to fresher comedies; more nights with blocks of comedies

Ad spending in 2011: \$2.91 billion, up 13.3 percent from 2010

"Comedy has had its most successful season in a decade," says Brad Adgate, senior vice president of research at Horizon Media. "The popularity of (ABC's) Modern Family has helped a lot ... similar to what The Cosby Show did in 1984 — it set the bar with programmers and viewers."

In fact, "when you look at the resurgence of ABC, the first program discussed is Modern Family," believes Bill Carroll, vice president and director of programming for TV station sales rep Katz Media Group.

Perhaps inspired by NBC's critical success with The Office, Parks and Recreation and 30 Rock, the networks are definitely getting more laughs. Even Jennifer Salke, president of NBC Entertainment, would agree.

"Almost all of the big four networks are enjoying success right now with comedy," says Salke. "There seems to be a real appetite from the audience right now for quality comedies, and I think that's great."

In sheer ratings terms (7.0 among adults 18-49, according to Nielsen) CBS's 2 Broke Girls had the best debut of any show, this season - reinforcing the network's strong block of comedies, including How I Met Your Mother and The Big Bang Theory.

"In fact, Two and a Half *Men* is the story of the year," insists Wendi Trilling, executive vice president of comedy development at CBS Entertainment — at least, she says, "in terms of taking a hit show that could have been at its end with the loss of its star [Charlie Sheen] that has



Still riding high on its musical sensation Glee, Fox looks like it has another hit with Zooey Deschanel's New Girl. (On the last Tuesday in January, the show's Nielsen rating share among 18-49 viewers [3.5/9] actually rivaled that of Glee — not to mention 7.3 million viewers.)

For Fox — the home of aging animations like The Simpsons, Family Guy and American Dad! — New Girl couldn't have come soon enough. "Until New Girl, Fox tried a whole bunch of live-action comedies and virtually all failed," recalls David Scardino, entertainment specialist at media agency RPA. "The only thing they seemed to get right was animated comedy."

On the cable front, even Comedy Central is outdoing itself in the laughter depart-



ment. How could it top Emmy-magnet *The Daily Show with Jon Stewart, The Colbert Report* and *South Park*, among other shows? With *Key & Peele* — the network's latest sketch comedy starring Keegan-Michael Key and Jordan Peele, which brought in the highest premiere ratings for a Comedy Central series since 2009, with the debut of *The Jeff Dunham Show*.

Heading into its third season, meanwhile, *Tosh.0* continues to defy all expectations for a viral-video-dependent series. As of early February, *Key & Peele* and *Tosh.0* were both finishing first for their timeslots across all networks.

"Given the current resurgence in comedy — particularly on the broadcast networks — clearly it stands higher than it has in a while," Scardino says. "I would guess the success of [Fox's] *New Girl* and [CBS's] *2 Broke Girls* — plus the resurrection of [CBS's] *Two and a Half Men* — has

probably taken the standing a bit higher."

According to Carroll: "As was historically the case with Cosby or All in the Family and The Mary Tyler Moore Show, among genres comedy is critical to network success."

And there's no doubt comedy has made some kind of a comeback. "If you look at the history of the top 25 shows on broadcast, five years ago there were two sitcoms that made the list, and this year there are 11," says Larry Jones, president of TV Land. "During the 2011-2012 season, four of the top five shows are sitcoms, and the other one is football!"

Not surprisingly, Jones is particularly proud of the Betty White vehicle *Hot in Cleveland*, which TV Land recently sold to CBS Television Distribution, which has plans to take the cable original out to syndication in either 2013 or 2014.

As hot as comedy seems,

however, researchers are quick to put its relative success into perspective.

According to Nielsen's recent analysis of the top 10 primetime broadcast TV shows, sitcoms have seen better days. "Once synonymous with primetime broadcasts," read Nielsen's report, "sitcoms disappeared from

the ranking in the 2004-2005 season, only to return again briefly in the 2008-2009 season, making up just 7.4 percent of the total combined audience of the top ten programs."

"I don't think comedy is as important a genre as it used to be," concedes Adgate. "The networks spend about 3 hours out of 22 hours of primetime programming a week on sitcoms."

Still — if only in relative terms — comedies are resonating with viewers, which has led to obvious questions about what's working and why.

"There are a lot of reasons for this comedy surge," says Jones at TV Land. "The country has faced tough times for several years now due to war and the financial crisis, and in these types of hardships, people want to laugh."

What's working? Women. "A lot has been written about female-led comedies being the hot property this year, following on the success of

Bridesmaids," explains Salke at NBC Entertainment. "There's clearly been a run on female comedies this year, with CBS's 2 Broke Girls and Fox's New Girl, along with our series Whitney and Are You There, Chelsea? we have some more female-centric pilots in the works right now and hope they, too, can be successful."

Seconds Carroll: "Looking at the list of successful shows, most of which have predominantly female leads, I would expect that the direction would be to explore more female writer/producers, female comics and female leads to take advantage of the current audience taste."

Conversely, "the other trend, perhaps a reaction to [let's call it the Lost Lady genre], was men dealing with a less than masculine world," notes Scardino. For some examples, look no further than ABC's Last Man Standing, Man Up and Work It. Unfortunately, in Scardino's humble opinion, "the results were not as good, but the shows weren't as funny either."

"With the recent success of multi-camera projects performed before a studio audience, some of the new offerings will likely follow that trend," Carroll adds. "We are going to see more of a balance of the production styles among the new comedy offerings."

Quality helps. "Better writing and better character development has helped comedies," according to Adgate. Holding up *Modern Family* as the prime example, he adds: "It success-

fully redefines the family in a very funny and nonthreatening method."

Of course, "Comedy has only one requirement: It has to be funny," Scardino says. "Frankly, when I read all the bloviating about 'single camera,' 'multi-camera,' 'culture clash,' etc — to me it's just 'industry experts' showing off with jargon."

The next logical questions to ask are what will work — namely next season — and how comedy's recent rise will impact the market.

Concerning the latter, Scardino says we can all expect — you guessed it more comedies. "Interestingly, to see the current resurgence in comedy, consider that the CW is now looking at comedies this pilot season after going several seasons without any comedies."

One such pilot, titled *The Carrie Diaries*, is a prequel to Candace Bushnell's *Sex and the City* series, and it imagines a young Carrie Bradshaw coming of age in the 1980s.

Actually brightening News Corp.'s fourth-quarter earnings, FX continues to gamble — and win — with unconventional comedies like Louie, It's Always Sunny in Philadelphia and Elijah Wood's turn as a (most likely) hallucinating recluse in Wilfred.

The network has high hopes for *Anger Management*, a comedy pilot starring Selma Blair and Charlie Sheen. (Your loss, CBS!)

Even the Independent

Film Channel has morphed into a comedy machine. Part of AMC Networks, IFC is betting big on the second season of original sketch show *Portlandia* — starring Fred Armisen and Carrie Brownstein — and David Cross's *The Increasingly Poor Decisions of Todd Margaret*.

For 2012, IFC just gave green lights to two new scripted comedies, beginning with *Comedy Bang!* — a sketch variety show based on Scott Aukerman's podcast of the same name. Aukerman is co-creator of *Between Two Ferns* with Zach Galifianakis. The second show, *Bunk*, is a game-show parody with a rotating lineup of comedians.

What else can we expect in 2012-2013?

More of the same, suggests Scardino. "TV is not an innovative medium. I don't see anything in the pilots that have been picked up so far that's 'out of the box,' and that's not surprising ... if there's any comedy that I would expect to see imitated it's probably *New Girl*, especially since I'm already seeing the lead character's hairstyle in new commercials."

That doesn't mean, however, that the networks plan on mailing it in. Quite the contrary, "We are making a concerted effort to launch more comedies at NBC right now and have opened a new block on Wednesdays to complement our established Thursday night series," says Salke. "We also have a strong comedy development

slate right now, featuring some great writers and producers that we are hopeful will give us additional comedy franchises for the coming years."

One could take that to mean that NBC isn't entirely satisfied with *Up All Night* and *Whitney*, one of which is faring far better than the other. (Hint: It's the one featuring Will Arnett, Christina Applegate and Maya Rudolph.)

"There is the possibility of more nights with comedy blocks," says Carroll. "Comedies can build on an 'ongoing' basis a successful night for a network."

Adds Carroll: "As the procedurals begin to fade, the cycle may return to comedy."

Jones, for his part, doesn't believe that the present comedy revival has hit its peak. "There is clearly a comedy surge," he says, "so if you're at a network that relies on comedy, you're in a good place right now."

"Comedy will continue to flourish in the coming television seasons," adds Trilling at CBS Entertainment. "There is a great base of comedies on television now that can launch new programs in the seasons to come."

"All programming genres are cyclical," Scardino cautions. "TV comedy was pronounced dead until *Cosby* resurrected it, then dead again until the last season or two."

Adds Scardino: "No doubt, [comedy] will die once more."

TOP 3 COMEDY



Two and a Half Men: Who needs Charlie? Ashton Kutcher unexpectedly revived this aging show



The Big Bang Theory: Besides beating up on *American Idol*, *Big Bang* is also climbing fast in syndication



Modern Family: Funny, smart and unexpected, the show is raising the bar for quality writing

Nielsen, Household rating, 2011 through 2012 season, through 2/5/1

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THE CHANGE ISSUE

MARKETERS AND RADICAL DIGITAL TRANSFORMATION







Consumers are both more confident and more pressured.

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Join us as we take a peek inside the marketing playbook at the high end (such as Tiffany, Coach and Whole Foods), the middle (Ford and JCPenney) and the low (Dollar General and Suave).



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THE REPORT CARD

What to Expect in Sports REAL-TIME MAGIC

Despite growing technology options, fans still love watching games live by DAVID GOETZL

Early this year, Northwestern Mutual signed a sprawling NCAA corporate partnership deal with CBS Sports and Turner running through 2015. There are a lot of parts, going all the way to the local level at the NCAA's 89 championships, though the centerpiece is the relationship with March Madness.

To use a metaphor from another sport, Northwestern is throwing deep, hoping to reach busy, upscale males. As CBS and Turner carry the tournament, Northwestern becomes the presenting sponsor of the First Four on truTV and attaches its brand to features in pre-game and halftime coverage. It also will run a lot of spots.

Giant ratings: This year's Super Bowl was the most watched telecast ever, in both 18-to-49 rating and total viewing







What's working: All things NFL. This year's Super Bowl was the most-watched TV show in history; Sunday games were the first- and secondmost-watched programs; Sunday Night Football led primetime; and ESPN's Monday Night Football drew the largest audiences on cable



What's not: NASCAR. While the sport has regained many of the viewers it lost in 2010, including many of the coveted younger viewers, it's still not near its 2007 levels

This upfront season, look for: From March Madness to the London Olympics, expect more events streaming online, as advertisers look to leverage technology and social media

Ad spending in 2011: \$10.5 billion, down 0.13% from 2010



The popularity of sports TV keeps growing, and viewers want to watch in real time — ESPN says 99 percent of its programming is watched live — at a time when entertainment programming is increasingly playing in a DVR-VOD-Netflix world. For advertisers, it means sports can bring a greater chance of not only having their ads being seen, but also having attention paid, which is particularly the case with big events.

"Consumers want to engage more and more with sports, and the more content they can get the better," says Chad Dern, Northwestern's director of brand and advertising.

There's a sense that sports also breeds a sense of community that dovetails with the social media boom — with passionate fans wanting to congregate or commiserate on Twitter or Facebook. After Tim Tebow, the celebrity Denver Broncos quarterback, tossed the winning pass against Pittsburgh in the NFL playoffs, there were about 9,400 tweets a second, the most relating to sports ever.

Also, live sports is increasingly being made available on

SPORTS ALSO BREEDS A SENSE OF COMMUNITY THAT DOVETAILS WITH SOCIAL MEDIA WITH PASSIONATE FANS WANTING TO COMMISERATE ON TWITTER OR FACEBOOK AFTER TIM TEBOW THE CELEBRITY DENVER BRONCOS QUARTERBACK, TOSSED THE WINNING PASS AGAINST PITTSBURGH IN THE NFL PLAYOFFS THERE WERE AROUT **9,400 TWEETS** A SECOND. THE MOST RELATING TO SPORTS EVER

digital and mobile platforms. ESPN has been a trailblazer there. Showing just how central online video has become, the Super Bowl was streamed live online for the first time in February, while NBC has promised every event in this summer's London Olympics will be available live on some platform.

"Sports has really in many ways not only maintained its strength, it's grown its importance because of technology, because of the nature of it being live, because of peoples' continued fascination with and enjoyment of sports in general," says Ed Erhardt, president of ESPN's global customer marketing and sales. "I think it's now clearly the most watched, consumed and talked-about genre there is."

Northwestern Mutual will be involved with March Madness on Demand (MMOD), where games are made available online gratis, allowing millions to watch at work during the tournament's first two days. Thanks to the growth in tablets and with viewers growing more comfortable watching long-form content on smartphones, MMOD traffic should only grow.

CBS, NBC, Fox and ESPN each cut new deals with the NFL to keep carrying the league's games into the 2020s. Comcast also spent liberally to secure the Olympics through 2020 for NBCUniversal and rebranded the Versus network, while securing rights to the NHL for it.

Sports provide the never-ending emergence of compelling stories — from Tebow in the NFL to the U.S. women's soccer team's surge in the summer of 2011. Many believe the proliferation in high-definition sets has led to ratings growth. The same goes with the boom in fantasy sports, particularly with the NFL.

And sports programming has a scarcity element that can increase popularity in the copycat TV business. When one network has a new take on reality programming, others are quick to follow. Consider: In scripted programming, how many comedies about young people in the big city have there been since *Friends*?

Nielsen says national TV sports advertising dollars rose 5 percent to \$10.9 billion in a 12-month period ending September 2011. That came as the number of hours of live sports programming also rose by 5 percent to 42,500-plus.

"The consistent ratings that sports offers — and they continue to grow — has helped maintain the growth of the ad dollars," says Jon Diament, executive vice president of Turner Sports ad sales.

With part of March Madness moving to the Turner Network and the NCAA Bowl Championship Series to ESPN in 2011, cable's share of sports ad dollars grew 37 percent. In 2016, the Final Four comes to cable for the first time when it moves to TBS.

But there is no ratings power in TV like the NFL. The Sunday national games on Fox and CBS were the first- and second-most-watched programs in 2011, while NBC's *Sunday Night Football* led primetime. ESPN's *Monday Night Football* draws the largest audiences on cable. The Super Bowl set a record as the most-watched show in U.S. history.

In entertainment, the upfront market necessitates big bets on what new and returning shows will thrive. Sports, though, can offer more predictability in terms of ratings and program quality.

"That audience is going to be there and perhaps even grow year after year," says Jon Brancheau, vice president of Nissan Motor Company's marketing. "Whereas when you consider the balance of primetime viewing with the [growth] in cable, there's erosion."

Nissan has a heavy and expanding involvement with college football. In January, it inked a deal through 2016 making it the "Premier Partner" of the Heisman Trophy, where it has had an association since 2005. Last fall, Nissan created a series of spots with 11 past Heisman winners that aired weekly during *ESPN Saturday Night Football* on ABC. Nissan also had previous win-

TOP 3 SPORTS



Sunday Night Football: Hail, hail: NBC's show led all primetime; national games on both Fox and CBS were the first- and secondmost watched programs in 2011



Sunday Night NFL Pre-Kickoff: High-definition sets and fantasy leagues are fueling hunger for more pigskin



The OT: Fox's post-game coverage, here with Howie Long and Michael Strahan, ranked third among sports programs

Nielsen, Household rating, 2011 through 2012 season, through 2/5/12

ners participate in a campus tour, using some grassroots marketing to buttress its sponsorship.

Besides the regular-season games, Nissan also was a top-line sponsor of the Bowl Championship Series on ESPN, including the Alabama-LSU national title game. The automaker is also deeply involved with the NFL — including a primary sponsorship of NBC's *Sunday Night Football* — but it can be harder for ads to stand out with so many auto marketers.

"There is a lot of clutter when you compare it to the BCS championship," Brancheau says. Nissan's BCS involvement allows it to gain auto-category exclusivity for a quarter in a game.

Back to the Super Bowl, for years advertisers looked for extra value by having their ads mentioned in media coverage. Now, there are instant comments on Twitter and replays on YouTube. Volkswagen's renowned 2011 Super Bowl spot featuring a young "Darth Vader" was viewed more than 50 million times on YouTube over the ensuing year.

Super Bowl pricing may be set to command remarkable year-over-year prices. In 2012, reports had the average 30-second spot at \$3.5 million, up about 17 percent from the year before. CBS may shoot for a much higher gain for 2013.

"I don't know that we've ever really tested the exact boundaries of what the Super Bowl is worth," says NBC's sports group senior vice president Seth Winter on nfl.com. "I think technology and social media have taken that value and grown exponentially the value to the advertiser."

Perhaps the most glaring evidence is the load of auto marketers in the game this year willing to deal with the logiam to try to stand out. Kia was in the big game for the third consecutive year with a spot featuring Motley Crue. As Kia looked to extend its impact, it released the ad before the game in theaters, and a 90-second extended version was on YouTube before kickoff.

Yet, perhaps nothing Kia has done in sports marketing has had the impact of a stunt at the 2011 slam-dunk contest during NBA

All-Star weekend: Los Angeles Clippers star Blake Griffin opted to jump over a Kia Optima for a spectacular dunk.

"We got lucky. Everything fell together just perfectly," says Tim Chaney, director of marketing at Kia.

Not only did the feat garner a lot of media attention, but Kia had a spot running with Griffin's dunk airing

during NBA broadcasts within days. Chaney says it brought an even greater immediate spike in people looking up information online about Kia than the company's 2011 Super Bowl spot.

"We like being involved in sports and particularly the NBA [because of] the passion that fans bring to it, and that passion carries over into how they view the sponsors of the sport," Chaney says.

The NBA lost loads of regular-season games due to a labor dispute, but there does not appear to have been much fan backlash. A few reasons are storylines such as Griffin leading the traditionally woeful Clippers to success and the Miami Heat's pursuit of a championship with LeBron James.

Through the first 13 games on TNT this season, NBA household ratings were up 66 percent, while the Chicago-Los Angeles Lakers game on Christmas Day gave ESPN its third highest regular-season ratings ever.

Sports also brings communal viewership in bars and college dorms — one that is unlikely to be found with other programming anymore. That does bring a risk of viewers failing to hear an ad amid the hubbub.

But Northwestern, for one, tries to prepare for that with ads that offer compelling visuals and try for other bar-proof tactics. "You have to kind of develop the creative knowing the environment it's going to run in," Northwestern's Dern says.

Over time, digital platforms will continue to impact traditional TV, but sports may weather any storm better than other genres — at least according to Yahoo executive vice president Ross Levinsohn.

"The last bastion of success for traditional TV will be sports," Levinsohn said in January at an industry event. "There's nothing like sitting on your couch and watching the game. Because the outcome is always in doubt in sports, you have to watch it live, and because prices are so high, I'm not sure digital is going to get there any time soon." \Box









What to Expect in Regulity

Even as American Idol loses its edge, America's still falling for the song-anddance routine by wayne friedman



What's working: Despite the clutter, some proven winners, including Survivor and Dancing with the Stars, continue to charm. Pawn Stars, Swamp People and American Pickers are wooing cable audience



What's not: Familiar franchises with few new twists. The Biggest Loser, The Bachelor, America's Next Top Model and Project Runway are losing viewers

This upfront season, look for: Fewer two-hour programs, and with Howard Stern joining America's Got Talent, a little more trash talking at the judge's table

Ad spending in 2011: Spending on variety shows, including reality TV, was \$5.5 billion last year, up 11.9 percent from 2010



More than 300 different TV reality shows have been on the air since 2000 — the dawn of modern-day reality television, which

What have we learned so far? Now 12 years later - and after completing the fall part of the 2011-2012 season — it is tougher than ever for reality TV programs to capture viewers' interest. As with all of TV -

broadcast in particular - reality is subject to viewer fatigue and erosion, possibly because of an oversupply. Many top reality TV shows tend to suffer declining viewership.

Despite this, reality TV con-

tinues to grow with a plethora of variations - including singing, dancing, performing, survival and sports competition; straight-head game shows; as well hoarding, celebrityfocused lifestyle, dating, marriage, modeling, design, hair styling, pawn dealers, deep-sea lobster fishing, business, fitness/health and a slew of cooking competition shows.



And more keep coming.

"We are not sitting around scratching our heads looking for sources of inspiration," says Paul Telegdy, president of alternative and late-night programming of NBC Universal Television. "We hear dozens of pitches. The issues are to find novelty and differentiation."

Reality television's original business tease was that it is cheap to produce — helped by lucrative in-show branded entertainment deals for consumer marketing companies. Also, the pluses are these shows have a quick start-up time. The downside? Networks can go through ideas quickly, and even the best have little library value. All this continues as reality programming begins another decade.

Since 2004, the king of all reality TV — and all TV series — continues to be Fox's *American Idol*. But now in its 11th season, *Idol* seems to be showing its age. During the first episodes of the just-started new season, *Idol* was down a big 20 percent to 25 percent in ratings from episodes of a year before.

Brighter news from cable shows is that reality is increasingly earning big marks — like MTV's *Jersey Shore*, as well as big numbers for History's *Pawn Stars*, which has rocketed the network up the cable ranks.

Here's how some of the biggest shows are faring:

Fox

Though ratings have dipped

in recent years, national TV advertisers continue to flock to *American Idol*.

Now pulling in 18.5 million viewers so far — down from its 20-million plus level — Gary Carr, senior vice president and executive director of national television for media buying agency Targetcast tcm, says the show is still way ahead of other network TV shows in terms of pulling in big, consistent audiences, still a major draw for TV marketers looking to make a impact.

In the early years many advertisers placed reality on a lesser quality level — and lower price level — than scripted shows. Much of that disparity has disappeared. For example, according to *Advertising Age*, pricing for a 30-second TV commercial in *Idol* is averaging \$468,100 on Thursday night and \$502,900 on Wednesdays. Only NBC's *Sunday Night Football* in primetime grabs a higher number — \$512,367.

Last year — season 10 — was the first year since season five (2005) that *Idol's* overall audience increased, a rarity for any TV show of its age. In 2011, *Idol* averaged 23 million viewers versus 22.5 million in 2010.

Not surprisingly, the median age of *Idol* has increased each season — now 47.4 years old versus 31.9 years old in 2002. *Idol*, because it is getting older, lost some of its key 18-49 viewer dominance — at a 7.5 rating average in 2011 among 18-49 viewers, down from 8.0 in 2010.

While some suggest viewer fatigue of reality singing shows, Fox launched a new singing competition show, *The X Factor*, which did generally well—a 3.7 rating among the 18-49 crowd—though a bit below super-high expectations. "It was pretty robust for a first year show," says Brad Adgate, senior vice president and corporate director of research for media agency Horizon Media.

CBS

Versus its network competitors, CBS continues to get steady returns from just a few reality shows — longtime franchises *Survivor*, *Amazing Race* and *Big Brother*.

Unlike other networks, you won't find multiple five-episode or 10-episode limited run reality shows at CBS, or expanded two-hour versions. "We don't have the room to run two hours," says Jennifer Bresnan, executive vice president of alternative programming for CBS Entertainment. "When you run longer, you run the risk of watering it down. Our No. 1 priority is to protect the brands."

In 2010, CBS made a rare move, adding a new reality effort *Undercover Boss* on Sunday night — soon to move to Fridays. Though down from its first season, *Boss* averaged a still-solid 3.4 rating among 18-49'ers in 2011. Earlier Sunday evening at 8 p.m. has been a longtime spot for *Amazing Race*, which continues to post solid numbers. Its most recent edition earned a

2.9 rating among 18-49'ers and 10.2 million.

For 21 seasons, *Survivor* has been on Thursday night at 8 p.m. Then a year ago it moved to Wednesday at 8 p.m. in part to get out of the way of Fox's *American Idol* — but primarily to make way for growing comedy *The Big Bang Theory*, which moved from Mondays.

Still, *Survivor* flourishes. For its just completed fall 2011 season, the 23rd edition, *Survivor: South Pacific*, in its regular airings, averaged a 4.0 18-49 rating. Looking at all its episodes, the show did a 3.3 18-49 rating and had 11.1 million overall viewers. This was up from the way spring 2011's *Survivor: Redemption Island* went, a 3.1 rating and 11.0 million viewers — somewhat of a rare accomplishment for a 12-year-old TV series.

NBC

Up to a year ago, NBC's big in-season reality efforts have been with *The Biggest Loser, Celebrity Apprentice*, and its previous incarnation, *The Apprentice*. Then came *The Voice* in the spring of 2011, coming out of nowhere, scoring a big average 4.5 rating among 18-49 viewers for its initial 12 episodes' season.

While *The Voice* has been a big boon — with the network counting heavily on it on Monday, along with *Smash*, a scripted-drama focusing on the inner workings of putting together a Broadway musical — NBC's other reality efforts have



TOP 3 REALITY



The Voice: This surprise hit, fueled by Christina Aguilera and Cee Lo Green, has rocked NBC's Monday



American Idol: Fox's older, wiser *Idol* has seen median viewership climb from 31.9 years in 2002 to 47.4 years this season



Dancing with the Stars: When the celebrity lineup is right, ABC's *Stars* still light it up

Nielsen, Household rating, 2011 through 2012 season, through 2/5/12 been flagging with viewers.

This has come from overuse, especially multiple two-hour versions of shows, in particular *Loser*, which dipped to an average 2.2 rating among 18-49'ers in fall 2011 versus a 2.8 rating in spring 2011.

"This network has asked too much of it," says NBC's Paul Telegdy. "We are going to be a bit more judicious about how many hours it should run. *Biggest Loser* is No. 1 in category [health and fitness] and we need to keep it there."

In the summer, NBC's America's Got Talent has been the ratings leader. Next year the controversial radio and media personality Howard Stern joins the judging panel, who Telegdy says, according to some surprising research, will bring in more women viewers.

ABC

In recent years, ABC's Dancing with the Stars has — for the most part — been the second- or third-biggest rated reality show on network television, depending on its edition. It is still highly important to the network.

Now running two versions a year, the seven-year-old dance competition show dipped to a 3.7 rating among 18-49'ers and 18.3 million viewers overall for its fall 2011 edition. *Stars* had a 4.0 average rating among the 18-49 crowd in 2010 and 18.5 million overall viewers.

But don't count *Stars* out. Being so celebrity-focused, and pushed by marketing spin from the off-line stories personalities generate, *Stars* can be a surprise from edition to edition. "As soon as the celebrities are announced, it's always the first clue as how it will do," says David Scardino, entertainment specialist for Santa Monica, Calif.-based media buying agency RPA.

ABC's long-running *The Bachelor*, a mid-season reality effort, which comes on after *Stars* ends, still pulls in decent numbers, a 3.2 rating among the 18-49 group and some 10.1 million overall viewers in its most recent effort. The year before it had a 4.0 rating and 11.6 million viewers.

The CW

America's Next Top Model has been a big reason young women come to the network over the last few years. But recently it has seen a major decline, earning half the numbers it was getting in 2010 — now at 0.8 18-49 rating for its most recent 11th edition, down from a 1.5 in its eighth edition. Remodeled, about a modeling agency, has failed to gain traction.

Cable Networks

Just as in other programming areas, reality TV on cable continues to grow. In all, six of the top 20 shows for cable in 2011 were reality shows.

Perhaps the biggest news

is that MTV's *Jersey Shore* has risen to the top among viewers for all regularly scheduled cable TV series — not just reality shows. In 2011, it grew to average 9.3 million viewers, according to Nielsen's live plus seven days worth of viewing data.

Though ratings were down for *Shore* at the start of season four of the show, it continues to be a strong performer, as does MTV's *Teen Mom* franchise.

Three top-rated reality shows have given a surge to History (a channel part of A&E Networks group) — Pawn Stars, American Pickers and Swamp People. Pawn Stars has earned an average 7 million viewers, fifth most viewed cable show overall. American Pickers pulled in 5.8 million viewers, good for 10th place. Swamp People, took in 4.9 million viewers, 17th place.

As reality TV grows for many cable networks, their brand identity more closely follows their top efforts, including E!'s *Keeping Up with the Kardashians*, Bravo's *Real Housewives* and *Top Chef* franchises, Lifetime's *Project Runway* and Food Network's *Food Network Star*.

Overall, Katz's Bill Carroll believes reality TV will continue to flourish, especially when it comes to high-profile competition-oriented shows: "It is event programming — shows that have rooting interest for consumers continue to do the best."

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Five years ago, the hourlong televised drama was enduring one of its inevitable creative lulls. The networks were falling over themselves to mimic the success of ABC's *Grey's Anatomy*, which led to a glut of shows featuring sexy professionals (attorneys, accountants, acrobats, etc.) acting all sexy and whatnot, their couplings and uncouplings and recouplings set to the strains of throaty emo ballads. On cable, HBO was wrapping up *The Sopranos* (darkly and deliberately), FX was winding down *The Shield* (spectacularly), and AMC hadn't yet thrown its hat into the original-series ring. (*Mad Men* didn't premiere until July 2007, and the Internet didn't discover it until several months after that.) All things considered, it was not the finest time to accidentally Krazy Glue oneself to the couch.

As is its wont, the TV drama pendulum proceeded to swing in the other direction, leading us into one of its most creatively fecund periods to date: *Breaking Bad, Friday Night Lights, The Good Wife, Justified, Boardwalk Empire.* At times during the last half-decade, there were more entertaining hourlong dramas than there were time slots in which to air them. House arrest never seemed so appealing.

And then came the new drama arrivals for 2011-2012. Hello, swinging pendulum.

So as we near the end of this uninspired season, it seems a fine time to look back at what we saw, what we loved/hated and what we learned. With some help from the great Bill Carroll, vice president and director of programming at media-rep firm Katz Media Group, we present these eight handy lessons, several of which are being actively ignored as broadcast and cable networks prepare their summer and fall slates. Those who cannot remember the past are condemned to repeat it, etc.

THE REPORT CARD

What to Expect in *Drama*

DRAMA'S STAR FADES

Alcatraz, Charlie's Angels, The Firm ... yawn. What we wouldn't give for another Breaking Bad or The Good Wife. By LARRY DOBROW

(1) Respect the police/detective/ quasi-governmental agency/whatever procedural: Say what you want about CBS' slate of cop shows — that they shamelessly poach plots from one another, that they're cast using an ethnic checklist. (God forbid TV should underrepresent Burmese forensic pathologists.) And yes, the CSIs and NCISs and Criminal Minds demand little from the viewer except a pulse, one functioning eyeball and a willingness to believe that maybe this time the personally-flawed-but-professionally-resolute team of law-upholders won't manage to find and apprehend the baddie in a brisk 48 minutes.

But Americans like these shows.

Advertisers like to buy ad time on shows that Americans like to watch. These are the rules of the game. "Broadcast television is basically filled with procedurals," Carroll shrugs. "That's what works."

This year's new entries to the genre, CBS' Person of Interest (about a former Green Beret who attempts to stop crimes before they happen) and *Unforgettable* (about a cop who has the blessing/ curse of remembering every detail of everything ever, except when her sister was offed), both ranked in Nielsen's primetime top 20 through January. They are intermittently engaging and utterly inoffensive. If they were the featured entertainment on your flight, you would watch them.

(2) But don't respect the police/detective/ Mountie/rogue association of former spies that operates with unofficial Pentagon sanction/whatever procedural too much:

For networks not blessed with CBS' viewers and their paralyzed remote controls, developing a cop show has proven an ordeal. Take NBC: With Law & Order receiving last rites, the network decided to meld a procedural component with characters and plots inspired by ... the Brothers Grimm? The resulting product, Grimm, proved every bit as schizophrenic as one might expect. On the plus side, it turns out that reformed werewolves are proficient at cracking unsolved homicides.

Then there was Fox's Alcatraz, which layered a Lost-like mythology — mysteriously disappeared prisoners reappear after a few decades and start, like, knocking off convenience stores — atop a crime-of-the-week framework. Intriguing though the underlying premise may be, Alcatraz barely services it some weeks. Sadly, Fox seems to have interpreted low ratings for the excellently impenetrable Fringe as a sign that mythology-dense shows with overlapping alternate realities can't thrive without throwing less-involved viewers a lifeline.

(3) A branded network is a successful network: This holds across genres, but especially for drama. It has been mentioned once or twice that CBS has branded itself as the go-to channel for procedurals (which does a disservice to The Good Wife, making a case for itself as the quietest, smartest, most character-driven drama

in recent TV history). Equally worthy of notice, however, is USA Network's subtle strategy: branding itself not only with a specific type of programming, but a specific look.

USA has made a name for itself over the past few years with its year-round rotation of what might be described as airy procedurals. Yes, a crime is committed and solved within the constraints of the time slot, but shows like Burn Notice (superspy finds himself disowned, solves crimes), White Collar (con man misses girlfriend, solves crimes), Psych (goofy observationalist is bored, solves crimes) and Covert Affairs (multilingual babe gets dumped by boyfriend, solves crimes) have more in common than their quirkyprotagonist center and lightly comic tone. No, they're also among the brightest shows — huewise — on television.

Carroll doesn't think this is a coincidence. "It's a stylistic approach that's had some success," he explains. "They're all really well-lit and they all have lots of action sequences set outside in the sun. I'm sure it's a conscious decision." Even the network's non-dramas stick to the visual script: Seven years into its second USA Network tenure, WWE Raw remains among the most spectacularly bright programs on TV.

(4) At the same time, don't defy viewer expectations: When viewers point their clickers TNT-ward, they expect to land on either a crime show with quirked-up female protagonists (The Closer, Rizzoli & Isles), NBA hoops or a 7,300th airing of *The Shawshank Redemption*. That's probably why Men of a Certain Age, one of the finest, weariest dramas to air on cable in some time, failed to find a consistent audience. It was canceled last July after two seasons.

"On one hand, Men of a Certain Age wasn't what the audience expected from [sitcom mainstay] Ray Romano," says Carroll. "But also, Men was so far removed from what you usually get on TNT. When you vary from that it's difficult for the audience to make that leap."

(5) Fear the phrases "series reboot" or "series reinvention": In the 2011-2012 season, that which was once good was not good anew, or something. NBC's U.S. version of





What's working: Shows adapted from other media, including FX's Justified and NBC's Parenthood



What's not: Mad Men knockoffs, including *Pan Am* and *The* Playboy Club

This upfront season, look for: Networks staying true

to their brands, whether it's CBS' procedurals, USA's lighter crime dramas or TNT's quirky female protagonists

Ad spending in 2011*: **Drama**

\$7.06 billion, down 7.46 percent from 2010

UPFRONT

TOP 3 DRAMA



NCIS: Los Angeles: Talk about a lock: Fans can't get enough of this CBS chesnut, especially with West Coast bad guys



The Mentalist: Simon Baker plays CBS' best-loved psychic



Criminal Minds: Among police procedurals, *CM* carves a niche by focusing on how bad guys tick

Nielsen, Household rating, 2011 through 2012 season, through 2/5/12 Prime Suspect, with Maria Bello stepping into the role rendered iconic by Helen Mirren, generated more attention for the oddball hat Bello donned in promos than it did for its thematic and visual reinventions (less civility and manners, more imitation-NYC grit). "The show had a strong cast, but the only things it really had in common with the Prime Suspect that people loved was the title and the female lead character. You could have called it anything," says Carroll, rejecting my helpful suggestion of Woman Cop Person with Funny Hat.

ABC's "reimagination" of *Charlie's Angels* made a far more galling mistake: assuming viewers wanted back-story and feelings rather than the thin plots and skimpy leisurewear of the original televised version. "I'm not sure what they were trying to do with the series," Carroll says diplomatically. It was axed in November after a mere seven episodes, but it took only that long for the creators to dishonor the proud legacy of jiggle TV. For shame, sirs.

(6) But respect your source material: All that isn't to say that idea-deficient producers should shy away from adapting characters and concepts popularized in other mediums. In fact, three of the season's finest shows arrived via that route: FX's Justified (Elmore Leonard adaptation), NBC's Parenthood (second try at movie adaptation) and NBC/DirecTV's Friday Night Lights (adaptation of a nonfiction book and a movie and probably a ballet). These three shows had two things that NBC's soggy update of The Firm didn't: killer ensembles in which the erstwhile lead happily cedes the spotlight for scenes at a time and utter respect for the tone and mission of the original. Justified works because the character of Raylan Givens isn't prettified or handed a broadcastfriendly set of people-person skills, while Parenthood is true to the movie's individualsare-part-of-a-greater-whole construct.

(7) If you feel the need to copy, don't wear your inspiration on your sleeve: This is not to knock the art directors of ABC's *Pan Am* or NBC's *The Playboy Club*, who inject plenty of verisimilitude into their

depictions of, respectively, the airlines and "social clubs" of the 1960s. That said, both shows come across as low-grade versions of *Mad Men* — which has framed scenes around circa-1960 air travel and a *Playboy Club*. In general, it's probably best not to orient an entire series around a specific vibe, which is what NBC attempted with *Playboy Club*. "Putting attractive young women in bunny costumes didn't seem integral to the plot," Carroll deadpans.

Compare these two slavish knockoffs with ABC's *Revenge*, a show that, at least in theory, apes any number of campy '80s-era dramas. Maybe this is because primetime viewers haven't been treated to an unapologetic soap in several years, but *Revenge* plays like a fresh, self-aware Hamptons-set amalgam of *Dallas* and *Melrose Place*.

(8) Don't draw conclusions in early

February: This last lesson is for me and my fellow pundits, rather than anyone who has anything to do with putting dramas on the air. As of this writing, we've labeled CBS the honor student of the 2011-2012 season, Fox the button-pushing scamp, ABC the stodgy professional and NBC the biggest loser. Unfortunately for anyone who has the poor sense to base viewing decisions on what we write, these conclusions could be rendered moot by the best midseason slate in years. One can only glean so much from a pilot, but ABC's The River (freaky deaky in the Amazon happenin's), NBC's Awake (alternate realities aplenty) and Fox's Touch (Kiefer Sutherland and a 10-year-old mute numbers-genius) don't fit into any preexisting mold.

To conclude, then, our current 2011-2012 season reviews might be outdated by the time you read this. So I'll try to redeem myself with a prediction in which I feel supremely confident: The final 16 episodes of *Breaking Bad*, still the best drama on television, will feature at least one point-of-view shot (like last season's Roomba-cam) and will prompt viewers to reorient their moral compasses after they find themselves rooting for the unredeemable Walter White. Take that one to the bank. \bullet









What's working: Strong, polished anchors, with both **Brian Williams and Diane** Sawyer gaining viewers



lost 15 percent of its 25-to-54 demographic last year

This upfront season, look for: Presidential election coverage is likely to use all platforms in new ways, fueled with an additional \$3 billion to \$5 billion in Super PAC ad spending

from 2010



Ad spending in 2011: \$3.30 billion, up 6.34 percent

THE REPORT CARD

What to Expect in News

THIS JUST IN: NEWS **MATTERS**

For the first time in nine years, network news shows an uptick in viewership by GAIL BELSKY

When it comes to television news, you couldn't ask for a richer year than 2011. Between the Arab Spring, Japanese earthquake, Libyan revolution, killing of Osama bin Laden and worldwide Occupy movement, it was a bonanza of gripping, dramatic, highly visual events. (While nothing to look at, the sputtering economy and GOP debates kept the pipeline flowing, too.)

You've got to hand it to the major news outlets. Considering how depleted their financial and staffing resources are, they managed to cover an amazing amount of foreign ground last year - globetrotting from one crisis spot to another. The broadcast networks were rewarded for their good efforts: Ratings were up across the board for the first time in nine years.

What could be better for the

shrinking sector than a singledigit rise in deliverables in 2011? How about an estimated \$3 billion rise in political ad spending in 2012 — a number some people think could swell to \$5 billion and beyond. Cancel the pallbearers: Television news is alive and suddenly rolling in the bucks. When the industry stops pinching itself, it can thank the U.S. Supreme Court for the advertising godsend known as the Super PAC.



It's been two years since the High Court's Citizens United ruling gave companies and unions carte blanche to fund nasty campaign attack ads. The ruling took place before the last midterm elections, but this is the Super PACs' first presidential campaign season, as well as its first upfront. Whether the final amount turns out to be \$3 billion, \$5 billion or even \$8 billion, the vast majority of the Super PAC money will go to television. (Pity the nonpolitical advertisers who'll be paying through the nose for the scraps.) And until or unless the ruling is repealed, television news, both broadcast and cable, can expect a major cash infusion every presidential campaign year, and a minor one for the midterm years.

"Cable news will have a strong year because they do the best job covering the conventions and the debates," says Brad Adgate, senior vice president of research at Horizon Media. "It's one of the few things that's certain."

Another sure bet: The broadcast networks are busy sorting their bonus bucks, too.

"The TV industry is building this into their budgets," says media critic and cablenews veteran Jeff Cohen, founding director of the Park Center for Independent Media at Ithaca College and the founder of media watchdog Fairness and Accuracy in Media (FAIR). "This is part of their revenue structure. They're counting on it."

It's nice that television news has something it can



count on. Cable news had a mixed year in 2011 (more on that later), and while the ratings are up on the broadcast side, business is definitely not booming. Ratings leader NBC Nightly News with Brian Williams rose 3 percent in 2011 to 8.6 million viewers. and ABC World News with Diane Sawyer rose 5 percent to 7.8 million. Last-place CBS - which switched anchors and changed its focus to hard news — gained 6 percent to reach 6 million. But the big three are still down 12 percent, 18 percent and 30 percent, respectively, from 2001. Go back 20 years, and the numbers are truly devastating: NBC has lost 22 percent of its viewership; ABC, 42 percent; and CBS, 51 percent.

A significant recovery? Not likely

No matter how much money the Anonymous Corporate Friends of Romney or the Faceless Labor Leaders for Obama throw at it, the chances of broadcast news making a significant recovery are next to nil. How could it, when the nightly news airs in the early evening? Who's home and hunkered down in front of the set at 6:30? NBC might have better luck with *The NBC Lunchtime News with Brian Williams* or *The NBC Midnight News with Brian Williams*. At least people are around then. (Williams himself has encouraged viewers to time-shift his broadcast.)

The broadcast networks are trying; they really are. They worked hard last year to differentiate themselves and provide unique content. NBC focused on the tsunami in Fukushima and the overthrow of Hosni Mubarak: ABC on soft news, interviews and features; and CBS on the economy and war in Afghanistan, according to the Tyndall Report. Will it make a difference? Probably not, says Adgate: "Things are character driven; if you like the anchor, you're going to go to that network. It's more important than the content."

So much for differentiation. The networks are fighting the good fight on all fronts: online, social and digital. But as tough as it is in the broadcast arena, the new-media world is even tougher. "I don't think there's a lack of effort," says Adgate, "but once you take it to other platforms, the competition is fierce."

So what will the networks do to recapture their former glory, or at least their former viewers?

"What can they do? If they make it entertainment, it's not the news," says Adgate.
"To get late-breaking stories, [viewers] go online; [they] don't go to network news. The obvious answer is to put it in primetime, but the networks are not going to do that."

The fact that the networks won't move their flagship newscasts into a better timeslot is a particular shame because they actually offer something that cable news shows can't: expediency. People don't have time to sit for an hour in front of the cable primetime shows to figure out what's going on. "The newscasts are pretty good," says Adgate. "They cover the day's events in 22 minutes, which is an increasingly hard thing to do. It's a very concentrated news brief, and it's becoming the best way to get top line information."

That might be a selling point for the over-55-yearolds the networks already have, but not necessarily for the 24-year-olds they need to attract. Younger viewers - the ones who could actually keep the networks alive after the Super PAC money is gone - want more than information, according to Cohen. They want some type of truth, which is why they turn to Comedy Central's The Daily Show (which averaged 400,000 more viewers last year than Fox News' entire primetime lineup — 2.3 million to 1.9 million) and The Colbert Report for their news. The fact that Jon Stewart skewers the traditional news shows makes him a more trustworthy source for younger viewers. His slant actually makes his news more honest. All that, and he's funny, too.

In a way, it's the same reason people watch the cable news channels. Fox goes right and MSNBC goes left, but at least they go, says Cohen. With the exception of Anderson Cooper - who refreshingly called former Egyptian president Hosni Mubarak a liar when he was, in fact, lying - CNN is so middle-of-the-road it doesn't say much of anything to viewers who want a point of view, Cohen maintains. (The network has historically trailed the other two, but in

January it rose to secondplace, gaining 42 percent in the 25-54 demographic.)

"In this modern era, readers and viewers want truth vigilantes; they want things exposed," says Cohen. "The he-said, she-said isn't captivating. If a politician is BS-ing, they're going to be going somewhere to find out."

Maybe that's what happened to Fox News. In January, the cable leader just celebrated its 10th year in first place amid great fanfare, with its stars sounding the opening bell on Wall Street. From all the hoopla, you would have never guessed Fox lost 9 percent of its total primetime viewership in 2011 — and 15 percent of the 25-54 demographic. And while CNN rose 16 percent and MSNBC gained 4 percent, together they are still half the size of Fox.

So where did all the Fox eyeballs go? Maybe they slid over to CNN or swung back to the broadcast networks. Maybe they moved on to the Internet, where they can get breaking news from any number of sources - slanted or not — that will give them a sharper, deeper picture of what's going on, particularly overseas. For news junkies, the Internet is the only place to go for serious reporting, according to Cohen. During the Arab Spring, Al Jazeera English offered in-depth coverage using local sources. The one-hour public television show Democracy Now! (democracynow.org) still

maintains a physical presence in Egypt — long after the corporate media heavy-weights left town. Apparently, the independent news outlet thought the story might continue beyond the spring.

It's impossible to know exactly how many viewers, and how many advertising dollars, have left television news for the Internet. But marketers are going there no matter what the figures are. "It's one of the biggest growth areas, and advertisers want to be in that space," says Adgate. "It's a dynamic shift. When you ask marketers, it's always 'social, digital.' We're going to spend more in the space than we did last year."

How much more will advertisers spend? Who knows? How much were they spending online in the first place? According to some sources, online ad spending hit \$31 billion last year; others say \$40 billion. Forrester Research expects online spending to hit \$77 billion by 2016, accounting for 35 percent of all ad spending and eclipsing television advertising. We'll see.

Marketers may want to be "in the space," but that's not where they're investing \$3 billion to sell a president — or \$149.8 billion to sell everything else.

So at least for now, television news has bought a little extra time to figure out how to survive and even thrive without the help of a ginormous advertiser with superdeep pockets.

TOP 3 NEWS



60 Minutes: Dusty, dated and still No. 1 in its category, this magazine format ranks No. 12 among all programming

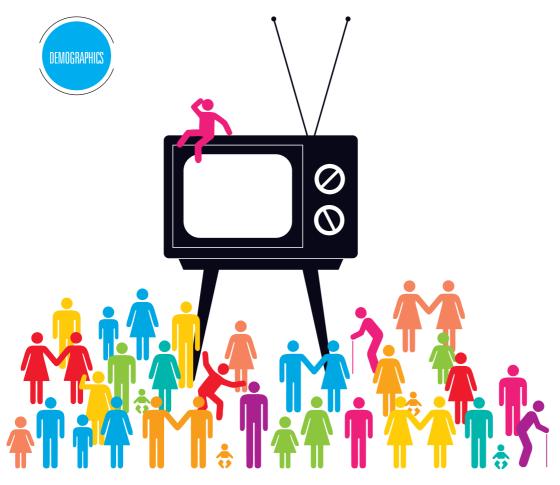


Dateline/Sunday: NBC's venerable 60 Minutes opponent still scores with its true-crime emphasis



20/20: ABC's entry still differentiating itself with a human-interest spin

Nielsen, Household rating, 2011 through 2012 season, through 2/5/1



THE DEMO: NOT DEAD, BUT DIFFERENT

This upfront season, the demo — long said to be on the death row of media metrics — shows a surprising amount of life by daisy whitney

For years, media execs have predicted the death of the demo, as new devices took bigger and bigger chunks out of smaller and smaller TV viewing audiences. Those pundits, quick to point out that advertisers ought to be just as eager to reach 61-year-old tablet-using skydivers as 33-year-old BlackBerry-wielding accountants, have been a little right and a little wrong. Instead of croaking, the demo — industry slang for demographic, or the age range of a show's key viewing audience — is more like Queen Elizabeth II or Prince Albert of Monaco: It may be only a figurehead, but its symbolic clout is as meaningful as ever.

But it's not in charge, and it is ruled by more refined tools to do the TV buying job. Increasingly, media planners are finding innovative ways to work around the demo and reach new audiences via social buzz, shopper data, set-top box information and other audience measurement tools.

Yet the demo is still the public face and common language of the TV buying business. And reports of its demise have been exaggerated, even as advertisers do everything they can internally to avoid the too-blunt instrument of the age-and-gender cookie-cutter cutouts of the American viewing public.

With the TV upfront about to kick off in May, the demo will be front and center because nearly all the ad deals struck will use the currency of the familiar age-sex demographics. Behind the veil, though, all the smart and savvy media buyers will be buying audiences.

Behind the Demo's Back

"Most of the currency is still in the demo, but most of the accountability to the clients is on the audience, so we have do internal translations," says Pam Drucker, president of market-place ignition and innovation at MediaVest. That's the job of an agency and of a media planner — to be the interpreter between the marketer and the media placement.

For years, TV media buying and selling has been sliced and diced by segments — adults 18 to 49, men 18 to 34, women 25 to 54, and so on — but those silos are hardly reflective of the way consumers watch TV today. While the bulk of viewing still occurs on the TV set, media buyers are remiss to discount new ways of viewing - bingeing on libraries of TV shows, watching on tablets, viewing online and increasingly, on cell phones.

It's the job of the buyer, and the job of the best buyers, to optimize the differences between all the other ways of measuring an audience and the currency of the demo to deliver the best results for their clients. "We are trying to think about moving away from demo buying because our greater vision is about igniting communities and people by shared passions, so we think about buying audiences, following content and creating a social or cultural impact," Drucker says. "If you just buy the demo, you are creating big gaps."

New Ways of Buying

When marketers enter a TV transaction with a media vendor, they're coming to an agreement to buy a certain amount of eyeballs in a particular age or gender range. "But to think that's all the buy is being based on would be naive. There is a lot of data we are using to better target our customers for our clients," says Rino Scanzoni, chief investment officer for GroupM. That includes sources such as MRI, set-top box data, and even shopper data from GroupM's Kantar Media, a division of parent holding company WPP that analyzes and monitors audiences across mediums.

"A lot of the decisions on which program and networks to target come through more sophisticated means and data analysis," Scanzoni says. The amount of data emerging from set-top boxes and Kantar Media is exponentially better than it was five years ago, he says. Kantar's shopper data, as an example, gives GroupM a more refined look at how purchase decisions are influenced by ads.

But just as buying primarily by demo leads to oversimplification, there are risks with a plethora of data, too. "You have to make sure you don't get data paralysis because there is so much of this stuff, and you have to siphon through it and see what is really going to make a difference in the realities of the TV market," Scanzoni savs.

Tools for Social Buzz, Addressability in TV Buying

Increasingly, marketers are eager to pinpoint the impact of social buzz on a show. That's why social media measurement start-up Bluefin Labs is catching the eye of many agencies. Bluefin pairs social buzz for a show and the commercials in it on a per-episode basis, so networks know which airing of a show is generating chatter, rather than just the aggregate buzz for a certain week. That kind of a breakdown goes much further to understanding and quantifying the social engagement of particular shows at particular times, MediaVest's Drucker says.

Digitas is another agency betting on Bluefin Labs and

is considering including Bluefin's tools into its internal audience measurement tools, Digitas has said.

In fact, internal tools are vital for agencies to work around the demo problem. MediaVest, for one, depends on proprietary tools it has cobbled together inhouse. That includes a program that lets buyers fuse a variety of databases to understand viewing patterns. The result is a holistic view of audience habits for use in TV buying, Drucker says.

On the TV front, the promise of addressability (targeting diaper ads to new parents, for instance) still exists as a way to move beyond demo buying. This can be achieved by matching set-top box data with third-party consumer insight from Experian and Acxiom to better pair households with consumer profiles, especially in satellite homes, Scanzoni says. Cablers, too, are making strides with addressability.



INCREASINGLY, MARKETERS ARE FAGER TO PINPOINT THE IMPACT OF SOCIAL BUZZ ON A SHOW. THAT'S WHY SOCIAL MEDIA MEASUREMENT START-UP BLUEFIN LABS IS CATCHING THE EYE OF MANY AGENCIES.





"CONSUMERS TODAY
CAN NO LONGER BE
DEFINED SOLELY BY
TRADITIONAL MEDIA
CONSUMPTION
PATTERNS, AND
ADVERTISERS
AREN'T LIMITED TO
TARGETING BROAD
BUCKETS LIKE THE
18-49 AGE GROUPS."

PATRICK DOLAN
EXECUTIVE VICE PRESIDENT AND CHIEF
OPERATING OFFICER. AND DATA LEAD. IAB

Paid, Earned, Owned

At Digitas, media strategists search for ways to fine tune audiences across TV, online and other mediums to understand how they fit into the new paradigm of "Paid, Earned and Owned" media. Earned media - social buzz, press coverage, Twitter and Facebook chatter - has skyrocketed in importance to marketers. In order to be successful in earned media, marketers need to ensure the content they create is getting in front of the audiences who are mostly likely to engage with it.

"We focus on audience delivery rather than impression delivery, so it's about finding those audiences first and using sophisticated data to locate them," says Dave Marsey, senior vice president and media practice lead at Digitas, one of the digital agencies under the VivaKi umbrella. That's where VivaKi's in-house "Audience on Demand" suite of buying tools comes into play. Included in Audience on Demand is the "trading desk" that crunches data on audience composition to deliver the most relevant ads to the most interested audiences.

"We can say we are trying to reach travelers who skew at the affluent end of a luxury vacation in this geographic area, and we can feed Audience on Demand with a whole set of audience markers as they assemble audiences and add impressions for us," Marsey says. With the suite in use since 2008, VivaKi recently added video buying to Audience on Demand. In time, this sort of audience buving can be built into TV transactions, Marsey says.

"Our vision is to make this the norm across all our buys. The clients that we are actively doing this for are clients that are more into driving direct business outcomes, such as travel, financial services or telecom," he said. Marketers that still need tonnage, such as those selling consumer products, are more reliant on demos. However, Digitas used the tool for Kraft's "Real Women of Philadelphia" campaign in 2010 to segment out specific consumers who were passionate about baking with cream cheese. Then, the marketer was able to deliver content with related recipes to them, which led to a 5 percent increase in sales.

Next Up: KPIs on TV

Demos have been the easiest way to buy media, and for a long time they were all that was available, explains Mark Grether, chief operating officer of Xaxis, an audience buying company that's part of WPP. But just as agencies have moved internally to buying audiences, soon they'll be able to buy TV on key performance indicators, or KPIs, he says. Some media is already bought that way online, and it provides a method of building the audience after the marketer knows exactly who will respond to the message. Essentially, KPI buying assembles the audience profile from the desired result. "We will define a KPI for a campaign, then test it for a subsegment of the population, then find out who is reacting to the KPI, then deliver only to that subsegment," Grether says. "I won't need to define a target group or demo, but rather a KPI."

This sort of buying is happening online where more targeted criteria is available. As marketers buy online in this fashion, they'll be able to graft that data across other mediums. Grether believes this type of audience insight can work on TV. "More clients will run a video campaign online before they run a TV campaign, not only to see how the creative performs, but which user segments react to the campaign the way the marketer wants them to react," he says, adding that Xaxis has tested this tactic in a few countries with

the most advanced TV buyers. "Then they can define their audiences based on the video performance and use that to do media planning on TV."

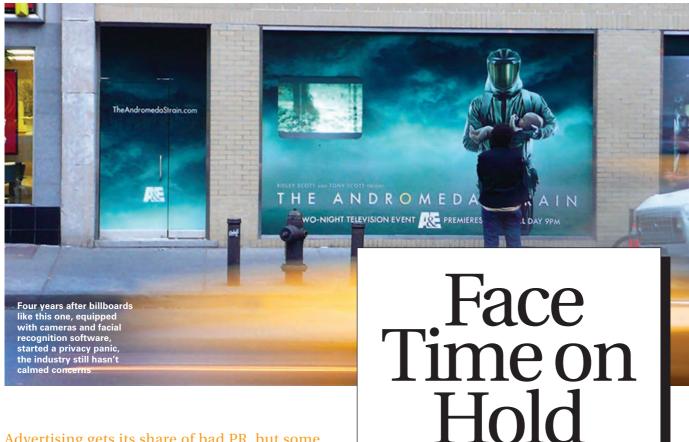
Better Audience Understanding, Better Results

Much of the push to layer in new ways of buying has grown out of the more refined and targeted buying made possible online. That thinking is now carrying over to TV.

"Consumers today can no longer be defined solely by traditional media consumption patterns, and advertisers aren't limited to targeting broad buckets like the 18-49 age groups," says Patrick Dolan, IAB's executive vice president and chief operating officer, and data lead.

"The increase in the number of channels through which data can be collected and distributed — from outdoor advertising, to complex CRM databases, relationships with the community through social media and email, as well as anonymized Web activity and digitally driven products and services provided by brands greatly enhances the quality of the consumer picture that advertisers have insight into. Advertisers can see consumer preference almost immediately, and they can quickly compare and relate it to larger demographic and historical patterns." But for now, the demo still reigns. It's the king of TV buying, for good or for ill, and it remains a top priority on many new-media buys as well.





Advertising gets its share of bad PR, but some incidents stand out as particularly extra-bad.

Back in March 2008, an article in *The New York Times* drew readers' attention to new biometric technology that enabled cameras in digital out-of-home displays to scan dozens of facial features to determine demographic information about passers-by including their age, race and gender, which in turn allowed computers to target advertising to them based on these factors. For example, a digital out-of-home display employing the technology might "show one advertisement to a middle-aged white woman ... and a different one to a teenage Asian boy," according to the article, provocatively (and not inaccurately) titled "Billboards That Look Back."

Whatever happened to the facial recognition trend in digital out-of-home?

BY ERIK SASS

Public reaction to the article was entirely predictable, which is to say almost entirely bad. The issue which immediately leapt to mind for most people was privacy: Should advertisers be able to collect such personal infor-

mation without your permission or even knowledge? Yes, pundits conceded, individuals moving in public spaces are probably fair game, but still — it's just *creepy*. And that kind of thing matters (or at least, should matter) to



advertisers concerned about brand perceptions. No brand in its right mind wants to be associated with unwanted, intrusive electronic surveillance. What was the right way to handle this?

These issues seemed especially urgent for two reasons. First of all, the applications described above are actually just the tip of the iceberg when it comes to the full power of facial recognition software, which can actually go beyond collecting demographic data to identify specific individuals by their unique facial patterns. Indeed, the technology was originally developed by the Israeli military for counterterrorism and is capable of matching a face in a crowd against a database of known individuals at the rate of at least 100,000 faces per second. (It's probably even faster, in its latest intelligence applications.) It didn't take much imagination to turn this into a "Big Brother" nightmare of total surveillance and control. Second, it was widely agreed that facial recognition was the wave of the future for digital out-of-home advertising. The technology was so powerful, and the benefits in terms of ad targeting (and therefore cost savings) so great, that within a few years every DOOH ad platform would be equipped for facial recognition. This seemed especially likely as the cost of facial recognition software plunged, along with DOOH hardware, enabling any

"mom 'n' pop" DOOH network to use it if they saw fit.

But like many bold predictions, it didn't come to pass — certainly not to the extent originally promised (or feared). While there aren't many statistics on facial recognition adoption in the U.S., the generally quiet news scene suggests DOOH networks aren't exactly rushing to implement the technology. Thus most of the growth reported by major players in the facial recognition arena, like Quividi, has come overseas, in Europe and Asia. So what happened to the great American facial recognition wave that never was?

Many DOOH networks have probably been scared off by "potential legal and privacy problems," says Bill Gerba, cofounder and CEO of WireSpring Technologies, who has followed facial recognition technology closely. Gerba adds: "There have been lots of small-scale pilots and projects, but there hasn't been any serious, widespread adoption — a lot of interest, but not a lot of traction yet."

One contributing factor, Gerba noted, is the advent of new technologies that to some degree obviate the need for facial recognition technology — for example, near-field communication, which allows consumers to voluntarily identify themselves in interactions with digital marketing platforms in order to get targeted offers. Although this technology is also in its infancy, manufacturers and

IN JANUARY OF THIS YEAR, INWINDOW **OUTDOOR ANNOUNCED** A PILOT PROGRAM TO CREATE FIXED "EXPERIENCE STATIONS IN MALLS AND HOTEL LOCATIONS NATIONWIDE IN PARTNERSHIP WITH INTEL. THE FREESTANDING, SEVEN-FOOT-TALL INTERACTIVE KIOSKS WIII FNARIF INWINDOW TO DEVELOP A VARIETY OF "IMMFRSIVE BRAND EXPERIENCES INCLUDING GESTURE INTERACTION, MULTI-TOUCH SCREENS AND **NEAR-FIELD-**COMMUNICATION CAPABILITIES.

tech companies are hurrying to add NFC technology to mobile devices and apps to enable various kinds of interaction, including mobile payments.

Google and its partners are pushing NFC through a number of platforms, including Google Wallet, PayPal's Android-based



mobile payment system, and Foursquare's latest Android app. (In the Android universe, NFC is called "Android Beam.") Visa is incorporating NFC features into its new mobile account functions, including the V.me digital wallet, courtesy of Monitise, and MasterCard is quickly moving in the same direction.



Meanwhile, major advertisers are also expressing interest in NFC in a variety of media: Most recently, Lexus inserted NFC chips into copies of the April edition of *Wired* magazine to promote its 2013 Lexus GS sport sedan.

Some of the most compelling applications for NFC are in DOOH advertising, where

NFC chips can enable ecommerce transactions as well as identify the user. In April 2011, Reach Media Group and Blue Bite partnered to introduce NFC interactivity to RMG's entire network of 75,000 DOOH displays, enabling easier downloads of mobile apps, coupons and offers, in addition to facilitat-

ing purchases and participation in rewards and loyalty programs. In January, NBC announced a partnership with VeriFone to enable mobile purchases in taxicabs and at gas stations using NFC technology; passengers who want to buy a product advertised on a video screen in a cab or gas pump can do so with an

NFC-enabled mobile device.

Gerba points to other technologies, which allow users to voluntarily identify themselves, their interests and their locations to advertisers — for example, location-based networks like Foursquare and Gowalla. While these networks don't necessarily give precise spa-



tial coordinates for users. their demographic information can be quite detailed, and "people are obviously less squeamish about sharing personal information when you're announcing to the world what you're doing anyway," Gerba observes. DOOH displays can easily integrate location-based networks, enabling them to deliver targeted advertising, promotions and so on through interactions with mobile devices with NFC or Bluetooth.

Facial Recognition Is Still in the Fight

It would be a mistake to conclude that advertisers and DOOH networks are simply choosing to skip facial recognition technology, however. Because while NFC and place-based networks offer many opportunities for identifying and locating individuals, the fact remains that only facial recognition technology is capable of gleaning identifying aspects of an individual. Likewise when it comes to precise tracking of individual movements — a key source of data for retail marketing — there are few alternatives besides technology that "look back."

Gerba notes that locationbased social networks "don't give you the idea of how shoppers are moving around in the store, or traffic patterns, so there's still plenty of space for complementary technology." Similarly, location-based networks and mobile devices equipped with NFC don't necessarily convey key demographic information including age, race or gender. Only facial recognition technology can provide these for every individual whether or not their mobile device is equipped with certain hardware and, indeed, regardless of whether they have a mobile device at all. While new, gesture-based DOOH systems, which invite participation, can make some data-gathering voluntary, there are other situations where passive data collection is the only or most effective option.

In fact, recent months have seen renewed interest in facial recognition technology, though it's not always identified as such. Of particular note is the Audience Impression Metrics Suite created by Intel for DOOH networks following its acquisition of Cognovision in November 2010. The AIM Suite pairs biometric scanning with powerful embedded computers to ascertain "actual impressions, length of impressions, potential audience size, and gender and age range demographics."

A number of DOOH networks have tapped Intel's AIM Suite for audience measurement. In January of this year, InWindow Outdoor announced a pilot program to create fixed "experience stations" in malls and hotel locations nationwide in partnership with Intel. The freestanding, seven-foottall interactive kiosks will enable InWindow to develop a variety of "immersive" brand experiences, including gesture interaction, multitouch screens and nearfield-communication capabilities. Provision Interactive Technologies also announced that it was integrating Intel's AIM Suite for audience measurement into its 3-D holographic kiosk displays. Provision will be deploying the kiosks in big-box retailers nationwide through a partnership with Premier Retail Networks (which has already worked with facial recognition technology for merchandising displays). And in February DS-IQ, which works with PRN affiliate Walmart, announced that it is integrating AIM into its Retail Media Platform, using AIM to incorporate real-time audience characteristics and engagement as inputs for store analytics around foot-traffic patterns, product engagement and product abandonment by store.

In short, some of the nation's largest retailers will be deploying facial recognition technology in the near future — indicating that the technology is hardly in danger of being passed by. Of course, this simply raises the same privacy issues which bedeviled facial recognition technology when it first debuted several years ago - issues which haven't been resolved since then. Chief among them: How should DOOH networks alert consumers that they are being watched by sophisticated technology

in order to deliver targeted advertising? And will this admission generate any kind of backlash?

As it turns out, a set of privacy guidelines for using facial recognition technology in DOOH networks has already been drawn up by the Point of Purchase Advertising Institute. The voluntary POPAI guidelines include recommendations about the way information is gathered and used, covering key issues like whether data is retained. For example, "In no event should image, video or biometric data ... be stored without an explicit consumer opt-in to do so." Most currently available facial recognition systems for DOOH measurement conform with this rule, only using biometric information once before erasing it. On disclosure, POPAI advises "marketers must provide a disclosure notice to consumers who may be monitored ... [which] should describe the ... collection methods in effect and whether data collected ... will be combined with other data including, but not limited to, register receipt information, credit card information, any NPPI information or data collected by third party and/or affiliate marketers."

However, to date no major retailers or DOOH networks have adopted the POPAI guidelines, leaving it somewhat ambiguous what rules — if any — will actually govern the use of facial recognition technology. In other words, the industry is still at square one.



With so many consumers switching to online video services, cutting the cord and turning their noses up at current TV programming, it's hard to think that advertisers' TV budgets will be left unaffected for much longer. In reality, TV ad revenues are up, live programming is stronger than ever, and the upcoming elections and Olympics are setting TV ad spending up for a strong year. But what of digital? Vincent Létang, MAGNAGLOBAL's executive vice president and director of global forecasting, recently sat down with MEDIA to talk about the brave new world of TV.



Vincent Létang EVP/Director of Global Forecasting for MAGNAGLOBAL BY CARRIE CUMMINGS

What is the current state of TV ad spending? Projection for 2012?

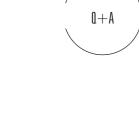
In 2011, television companies' advertising revenues were \$58.4 billion. That is a third, 33.6 percent, of the total advertising market in the U.S. The share of television has gradually increased since the early 2000s, mostly due to the rise of cable networks. National networks attract 66 percent of the revenues against 34 percent for local television. Broadcast television — national and local — represent 55 percent versus 45 percent for cable television.

For 2012, we predict TV revenues to grow by 6.8 percent, but a lot of that growth will be driven by the periodic events that generate incremental ad spending in quadrennial and even years: elections and Olympics. The 2012 election cycle will generate \$2.5 billion just for local broadcast TV which gets the bulk

of the bonanza, which will be an all-time high. The Olympics will generate approximately \$600 million for national television. *Without* the \$3.1 billion of extra revenues, TV growth would only be 2.4 percent in 2012.

How will companies like Hulu and Netflix impact TV ad spending in the future?

So far, Netflix does not carry any advertising, so it "competes" with traditional television for viewers' time, not for advertisers' money. The 21.7 million Netflix household clients who are streaming — out of 25 million clients — streamed an average 93 hours in Q4 of 2011. That's 2 billion hours during the quarter. Compared with the total U.S. population, that's only 2 percent of linear TV viewing. Netflix streaming subscribers stream approximately 7 hours a week compared to 34 hours of TV view-





"TELEVISION'S **FUNDAMENTALS ARE HEALTHY: ALL-TIME** HIGH, STABLE LEVELS OF VIEWING: GROWING CAPACITY TO MEASURE AND MONETIZE TIME-SHIFTED VIEWING HIGH PRODUCTION **QUALITY IN MOST GENRES**; WELL-ESTABLISHED IMPAC ON BRAND BUILDING: WELL-ESTABLISHE TOOLS THAT PROVE THE **ROI OF TV ADS FOR** CONSUMER GOODS." ing for the average individual — a mark that is stable by the way. That's a lot, but it would be a mistake to think Netflix streaming comes entirely at the expense of traditional live linear TV viewing. Some of it replaces DVD watching, some of it DVR replay.

More fundamentally, Netflix is only a substitution for library content and scripted genres drama, sitcoms, movies, kids programs; as long as networks are able to attract the best talent and release the most attractive new shows every season, they will remain at the center of family entertainment. And despite the efforts of some over-the-top players to launch original production like Netflix's Lilyhammer, it will take many years for them to create a talent ecosystem. Besides, live unscripted programming sports, reality TVis more popular than

ever and remains a stronghold for traditional TV viewing.

As for Hulu, that's a catch-up destination and broadcasters control the platform, so it's not likely to grow beyond

what its sponsors think is maximizing the total ad revenues of a given show. Finally, native online short video content, e.g., YouTube, are mostly "snacking" and not really competing for primetime TV viewing. Fundamentally online or mobile video consumption is mostly incremental — sometimes simultaneous — to television in terms of viewing patterns.

Overall, in the foreseeable future, we believe Over-the-Top-TV is more likely to impact the multiple system operator business than the free, ad-funded TV business. That is through cord-cutting: new households not subscribing to cable or satellite TV and relying on OTT and over-the-air broadcast TV instead, for either budget constraints, lack of interest or change in consumption patterns. We forecast 10.5 million

households will become OTT/OTA households by 2016.

Should TV networks be prepared for a drop in ad spending with the proliferation of digital? When will TV ad spending give way to online TV ad spending?

Overall, digital media do compete with television for advertisers' budgets but, at the same time, television is still stealing market share from other traditional media like newspapers, magazines and radio. We believe the outcome is neutral or slightly positive for TV's market share in the next few years. In 2016, we expect it to have a 36 percent share.

Television's fundamentals are healthy: all-time high, stable levels of viewing; growing capacity to measure and monetize time-shifted viewing; high production quality in most genres; well-established impact on brand building; well-established tools that prove the ROI of TV ads for consumer goods. That compares with a print sector that is losing readers and advertisers year-after-year. Categories that have been loyal to print for many years — for example, retail — do switch to digital and TV.

New planning tools from Nielsen or ComScore are allowing advertisers to buy online video with the same familiar concepts and reporting currencies, so multi-platform, multi-device TV distribution will increase. But TV broadcasters do control premium content and will continue to capture most of the ad revenues generated on those platforms — for instance, by bundling live broadcast and other audiences in their commercial offering.

By 2016, MAGNA anticipates traditional TV to generate \$73 billion in ad revenues against \$4.2 billion of online video advertising. \odot

Buying at the Speed of Light

SING A PRINCE SUYING

THE MARKET FOR REAL-TIME BUYING IS MOVING AS FAST AS, WELL, A TARGETED AD IN AN RTB SYSTEM. SPENDING ON RTB-BASED DISPLAY ADS COULD EXCEED \$2 BILLION THIS YEAR; AND BY 2015, ONE IN FOUR ADS PLACED ON THE INTERNET COULD BE DRIVEN BY MACHINES MAKING NANO-SECOND DECISIONS.

OFFICIAL CONFERENCE: INTERNET WEEK NEW YORK

MAY 16, 2012 THE WESTIN NEW YORK AT TIMES SQUARE





For years, critics have been predicting the demise of TV networks and the bedrock of their ad model, the 30-second spot. But far from being dead, TV nets continue to thrive. And they're learning how to boost the value of the viewers that are watching shows outside live scheduling windows, where audiences are turning to watch in increasing numbers.

Programmers knock themselves out to create seamless and customized packages by STEVE MCCLELLAN

INTEGRATED MEDIA CATCHES FIRE

CW adds new "missions" to its "Nikita: Code Breaker" game each Friday, when episodes air. The show has an iPhone and iPad app, as well

Networks and agencies, of course, are analyzing those shifts inside and out. Their future success depends on their ability to help advertisers understand and navi-

gate those changing patterns in order to keep their commercial messages in front of target audiences — where and when they decide to watch. And while the 30-second TV spot is still considered one of the most effective forms of advertising, it's more effective still when used as the foundation for multiscreen marketing packages that link to the growing array of platforms where viewers are consuming media.

And networks are adopting new business models as they refine their integration strategies. Case in point: CBS. At a recent media conference in New York, David Poltrack, the network's chief research officer, said that over the past year, the network had increased its online ad loads in CBS programs to 14 ads per hour, far more than the four ads it had originally placed in online shows. The reason? Sister network CW made a similar move two years ago and found viewers accepting of the heavier online ad loads.

The question for CBS was whether its older audience would also tolerate the increased number of online ads. As it turns out, the viewers didn't balk, Poltrack says, adding that the company's sales department has been able to obtain online CPMs that are significantly higher than those achieved for broadcast TV.

The upshot, says Poltrack, "is that a viewer streaming our program online is now worth substantially more to us than a person watching that program in playback mode skipping many of the commercials. In fact, the value of the online viewer is now surpassing that of the live viewer as well."

That's also the case at ESPN, which is saying a lot given that its live TV audience comprises one of the most profitable net-

works on the air today. In addition to its TV networks, ESPN has strong online and mobile presences. "In many ways, we think the Internet or digital viewer is even more valuable than the TV viewer," says Barbara Singer, vice president of advertiser insights and strategy at the network. Singer said that while the sports network's TV audience is upscale, "our digital viewers tend to be even more upscale." But the value goes beyond viewer profiles, Singer says, noting that even from an ROI standpoint there are certainly more narrowly defined client objectives that the digital audience achieves somewhat better than TV.

Indeed, live viewing is diminishing rapidly, according to a report issued by TiVo last month. Nearly two-thirds of the viewing on Web-connected TiVo units is now seen in playback mode or via on-demand video from Internet services such as Hulu and other online sites. The findings were based on the company's analysis of second-by-second usage across 2 million TiVo devices. The analysis determined that only 38 percent of viewing is live across that TiVo universe.

"We all know the way consumers watch TV is quickly changing, especially when it comes to the growing consumption of Internet-delivered content," says TiVo president and CEO Tom Rogers. "As people watch less live TV, the television industry is being challenged like never before to meet the needs of viewers. The reduction in time spent watching live TV has huge implications for commercial ad delivery, how consumers search and find programs, and the role of networks in the carriage of shows, all of which require the industry's increased focus."

While the TiVo data does reinforce the idea that many consumers enjoy the freedom of being their own program schedulers, that doesn't mean that the video world is shifting to on-demand-all-the-time mode anytime soon, says John Spiropoulos, senior vice president for research at MediaVest, the Publicis Groupe media agency. TV shows have to be anchored to something, he

argues, and what they're anchored to now are TV networks, with their defined schedules and far-reaching promotional apparatuses — the primary way word gets out about programming.

"What drives TV viewing is patterned viewing," asserts Spiropoulos. And today that is driven by networks that offer fixed daily schedules and heavy promotion. "With on-demand, that is completely gone, and

there is no way to breed the pattern," he says. "On-demand doesn't work if you don't know a show exists." While the industry is working on strategies to address that, he believes it will be a long time before they are fully developed and implemented.

That said, tracking and communicating with consumers throughout the day as they flow seamlessly across the multiscreen landscape is essential to marketer success, says Spiropoulos. "As a marketer, if you're not everywhere consumers are who might be interested in your product, then you are failing. You have to be there and be there now."

And in a fragmented landscape, scattershot marketing doesn't cut it, he says. Not only is it wasteful, it's risky, he adds. "It's a disservice if you're bombarding consumers with messages who aren't interested in your product." In the digital era, he says, in addition to integration strategies, "targeting becomes much more important."

The networks are acutely aware of all of that. Singer notes that only a "very tiny minority" of clients don't implement cross-platform advertising agreements with the network, while most have integration ad packages that embrace multiple platforms. For nearly two years now, the sports network has used a multiplatform research technique called ESPN XP, which is designed to

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help clients optimize their integration strategies by better understanding the network's audiences and how they consume media and respond to commercial messages. The network first used it for the World Cup Soccer tournament in 2010 and then for the National Football League and college basketball telecasts. And Singer says the technique has been so beneficial that ESPN is working toward making it a more standard research approach for mea-

suring the network's content lineup.

In his presentation at the media conference in New York, Poltrack argued that any analyses of the future prospects of the networks have to take into consideration the entire ecosystem in which they exist, which includes program productions, numerous digital platforms, and other outlets. He noted that during premiere week this season, cbs.com attracted 7.5 million unique viewers, which was up 50 percent from the same week in 2010.

And ad completion rates for cbs.com and the broader aggregation of Web sites known as the CBS Audience Network, are "consistently high," Poltrack says. In the second quarter of 2011, he notes, viewers of full online episodes stuck with the ads 96 percent of the time.

The CBS experience mirrors the performance of the CW Network, which began its so-called convergence strategy of selling integrated ad packages across TV and online (the latter with a load of spots equal to the broadcast run) two years ago. In that time, the CW has seen double-digit increases in the number of online series episodes streamed per week, with 92 percent of viewers watching the ads loaded into those episodes.

And research has also shown that the duplication in audience between broadcast and online is small — around





7 percent in 2010. As one source notes, "overnight TV ratings don't come close to telling the whole story anymore."

The CW has been at the forefront of integrated marketing efforts since 2006. One of its most recent efforts was unveiled in late January — the network developed an interactive game that ties client Kia, the Korean carmaker, to the network's hit show *Nikita*. The game, called "Nikita: Code Breaker," which features series star Shane West, enables fans to engage in missions, crack codes and ultimately discover top-secret government documents. The game offers new missions each Friday, the day the series airs.

The game's missions showcase the Kia Optima's graphics and technology, including utilizing its GPS coordinates to locate targets. The game will run for the duration of the series' second season. There's also a sweepstakes tied to the campaign that offers a chance to win a visit to the *Nikita* production set. Kia also sponsored the development of *Nikita* apps for the iPhone and iPad.

"Warner Bros. Television is always looking for ways to bring its fans more opportunities to engage with their favorite shows," says Lisa Gregorian, chief marketing officer of Warner Bros. Television Group, a partner in and producer for the network. "And what better way to reward *Nikita* fans than to give them the chance to be armchair operatives and assist with missions?"

Earlier this season, the CW and Microsoft search engine Bing unveiled a

multiprogram and multiscreen integrated marketing campaign called "TV to Bing About," designed to dovetail with the network's tagline "TV to Talk About."

One of the ideas behind the campaign was to tap in to viewer interest that goes beyond watching programs as scheduled. The network produced 50 pieces of "behind the scenes" original content about CW shows. For example, interviews were conducted with Ringer stars Sarah Michelle Gellar and Ioan Gruffudd, and Hart of Dixie star Rachel Bilson and executive producers Josh Schwartz and Stephanie Savage. A roster of other CW stars and producers were also filmed talking about their programs. Other creative elements were interspersed within CW shows on-air, including lowerthird search screens, logo bugs and teaser ads for the upcoming video vignettes.

The content aired during the season premieres of programs and as part of longer vignettes that appeared across Microsoft's online channel lineup including msn.com, Wonderwall and Bing, as well as on cwtv.com and on the network's Facebook fan page. It also lived on a custom Web site, cwtv.com/bing.

And other networks are tracking their audiences as they migrate across different platforms as well, and working closely with advertisers on integrated packages designed to enhance both reach and engagement.

Comcast's NBC is a good example. While most of the headlines have focused on the company's struggle to draw a pri-

For its "TV to Talk About" campaign, CW produced 50 bits of behind-thescenes content, featuring such stars as *Ringer's* Sarah Michelle Gellar and loan Gruffudd.

metime audience, the company boasts 100 million fans and followers of shows and talent across the NBCUniversal portfolio.

NBCU builds digital water cooler

John Shea, NBCU's executive vice president and chief marketing officer of integrated media, likens today's fan communities to the proverbial "water cooler" that people used to gather round at the office to talk about the previous night's viewing. "It starts with good content," he says. "In the integrated media space, our job is to hook advertisers and partnerships creatively into this array of programming that the consumer is devouring in a number of different ways."

To illustrate, Shea cites a holiday campaign that his unit executed for the Nook Color e-reader. "The client wanted a way to make this reader feel very personal to our audiences, particularly in the female space," he says. So the network produced a series of spots that were "very different," depending on the network or platform and the audiences that they attract.

For WEtv, the network produced a spot featuring two of its stars, Melissa and Joan Rivers, who talked about downloading fashion magazines in a way that reflected the banter they engage in during their show, *Joan & Melissa: Joan Knows Best?*

On Web site iVillage, the site's bookclub editors recommended titles that visitors might want to send to friends as gifts. And a microsite was created where readers could go to do a deep dive into various features of the Nook Color.

The various extensions were anchored by 30-second spots that ran on the networks. The 30s, says Shea, anchor all the campaigns that the integrated media unit puts together for a client. "They do more of the heavy lifting." But in a world where "consumers surround themselves with media content in a variety of different forms," the extensions are essential. "It's more about the fact that we have all of this new technology driving interest and engagement and awareness."



FOUR MYTHS

BY SCOTT FERBER

More than one industry prognosticator has declared 2012 the "Year of Convergence." And in many ways, I agree. We do seem to be at the tipping point of consumer adoption — with over 91 million smartphone users and roughly 10 percent of all households with access to connected televisions or devices.

Audiences are clearly ready and willing to view wherever and whenever it's most convenient. Manufacturers, as witnessed at this year's CES, are ready to roll with connected, high-quality devices, many of which were only beta dreams at last year's show. But the entire media ecosystem must get on-board in order to sustain a viable "converged" business model that allows all players to thrive.

Will this happen? Absolutely. Will it happen tomorrow? Probably not. The notion that a consumer-led transition to screen-agnostic viewing will translate just as easily to the media world is just one of the myths surrounding convergence. By debunking these myths, I hope to inspire others to leverage the significant benefits attendant

with speaking to consumers whenever and wherever they choose to view content.



MYTH 1: Convergence Will Rapidly Change the Way We Plan and Buy Video

As stated above, while screenagnostic consumer viewing will become ubiquitous, ingrained business practices of the ecosystem must change before true convergence can occur. Content creators must figure out how to profitably produce and distribute programming across multiple platforms. Publishers must invest in tools to help fully monetize inventory across screens. Data providers and research companies must begin to standardize services across media. And finally, agencies must create systems to allow them to adopt a device-agnostic approach to planning and buying media that maximizes bottom-line ROI for advertisers.



MYTH 2: Convergence Will Make Agency Media **Buying Extraordinarily** Complex

There is still much work to be done to determine which processes, metrics and best

practices become industry standard. This process will not be easy. But in reality after the initial pains of merging disappear and fluidity increases between insulated agency divisions, agency workflow will streamline, agency workflow will streamline and become more efficient. Technology will absorb much of the complexity of cross-media measurement, analytics and reporting, allowing agency talent to focus on broader strategy and service.



MYTH 3: Convergence in Media Selling and Buying Has Already Failed

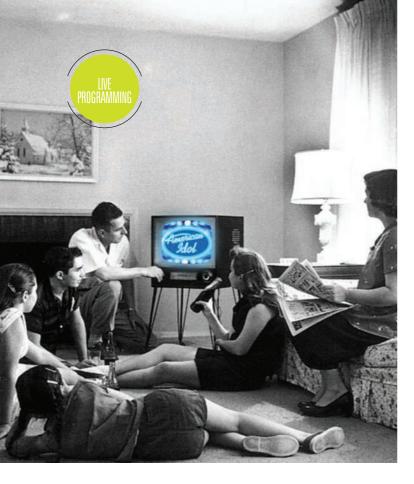
See Myth 1. For those who point to disappointing results among media companies who have tried to establish true cross-platform sales divisions, I would argue that if anything, they were merely ahead of the curve. Not all players within an ecosystem always move at the same speed. Even the smartest sales forces and forwardthinking media organizations cannot fully succeed if they do not have access to decisionmakers empowered to make cross-platform decisions, or availability of data that holistically measures performance and ROI. Demand drives supply. So often, the most innovative, industry-changing ideas are deprioritized for immediate revenue drivers.



MYTH 4: Convergence Suggests That All Screens Are Created Equal

As research recently cited, convergence doesn't mean that all screens deliver the same performance metrics, branding or scale. Understanding the individual strengths of each device, and figuring out the proper balance based on advertisers' goals, is crucial to realizing the benefits that convergence can offer. If implemented correctly, a multi-device approach can send performance against a given metric soaring, while decreasing cost per desired outcome. Convergence allows a more seamless, holistic conversation with consumers most interested in hearing from you. The shift toward audience buying as opposed to contextual-based buying will be crucial to fully capitalizing on the consumer-centric approach to marketing. On an individual basis, an emerging platform might make little sense to a given advertiser; emerging video platforms are seldom able to carry the majority of a campaign for most brands. By incorporating them into the overall audience mix, however, an advertiser can take advantage of the unique benefits of each, while still achieving a campaign's performance objectives at scale and on budget. @

Scott Ferber is chairman and CEO of Videology.



Who Says TV Is a Dying Medium?

TV continues to evolve, not disappear By Damian Bazadona, president, situation interactive

It's clear that the way we watch television and the very meaning of the word television have been radically altered over the past decade. After all, who needs to watch a big box at a particular time, in a particular place, when we have YouTube, digital recording devices and Hulu?

Consumers' television habits have simply evolved with technology, and it has completely stretched the definition of what television programming actually is. It's the very change in definition that has the business trades publishing goofy stories claiming "television is king" one week and crying "television is dying" the following week. The definition and the supporting metrics are drastically

different, and it's become difficult to have a serious, constructive conversation on the overall health of the industry.

What we do know is that the two simple words *on demand* have shattered the confidence in the long-term value proposition of television advertising. A true on-demand world for television means shifting consumer behavior from passive receptivity to active engagement on their time and terms.

This is *very* different from what television has always been for me. The metrics in how the media is purchased and their effectiveness measures will be significantly different. It ultimately means a whole new thought process for doing business in the world of media. It's all quite exciting when you think of what the evolution could actually look like for the industry.

But, while "on demand" is clearly a significant part of our future, there is a corresponding track that is also only going to continue to blossom and ultimately show "on demand" who's the boss — it's the power of live programming.

Sports, music, awards, politics, world news - our appetite for the "now" has only increased and will only become further accentuated through increases in social connectivity across global cultures. How could you not watch the Super Bowl live? Would you DVR the final episode of American Idol? Chances are, you won't because the entertainment value of these events is directly proportional to their ability to be consumed live. DVRs don't stand a chance against the power of the live experience, the real-time connective influence of Facebook and the range of social tools available to consumers. Because let's face it: The second we log on to Facebook or Twitter, we will find the outcome.

As a marketer who works in the live-entertainment industry, we are always marketing moments that have to be experienced live, whether in theater, tourism or film. I can tell you firsthand, looking through the data, that when we map social activity and consumer buzz to live (in-person) experiences, the connection is so clear: People crave the live moment and use it as a vehicle to connect and share their excitement with their network.

I wish the narrative surrounding the future of television would begin to shift toward the need for content creators to begin to develop entertainment that is meant for the screen in which it is showed on. This is the single biggest challenge, and corresponding growth opportunity, that has landed in laps of the executives at the major networks — developing an entertaining, relevant and profitable content model that matches consumers' fragmented media preferences.

The NFL is one of the few brands we should all look to that is truly pioneering the space by creating experiences designed for the destination. They maximize the platforms. Mobile is about speed; desktop is about access; and television is about the view. I think their ratings this past year and noted success in digital validate my strong admiration for them.

Like Betty White (who doesn't love a Betty White reference!), the television platform is about to truly reinvent itself and evolve with the changing times and consumer needs. I'm just hoping it happens sooner rather than later because my mobile device is screaming for some good content!



brought all these screen artists under one single tent, and into one issue.





The year is 1964. There are three channels on television. The average household has one or two telephones, none of which are push button. The "mini computer" won't be invented for another year and will sell for \$18,000 with no practical consumer use.

On a particular Sunday night in February that year, 73 million Americans tuned in to *The Ed Sullivan Show* to see The Beatles perform. Families and friends gathered around their televisions to take in the controversial performance and share their reactions. The experience reverberated beyond the living room, spilling out into everyday life, mostly through analog and in-person means, greatly constrained by geography.

In those days, watching television was a group activity, an institution. But as years passed, homes added more screens, programming became more diverse, and recorded/ondemand media caused a shift in viewing habits and hence an erosion to the once standard

gathering around a screen.

As the proliferation of various screen types collided with various technologies, two areas of research and culture began to emerge. The first, interactive television, added an unprecedented viewer-participation component to the TV viewing experience. Never before had viewers been able to so readily affect the plot line or outcome of a television show.

The second phenomenon has, as of late, bombarded the world of media with a promise to both viewers and advertisers the restoration of what once was a cherished and economically beneficial aspect of TV viewing. This sensation took the media world by storm in 2011 and is commonly referred

From Facebook to Twitter to text messaging, multiple screens are rewriting the way we relate to what's on the tube by Adam Broitman. Kristen Crusius and John Swords

SOCIALTV

to as Social Television.

In order to properly explore the progression of the television screen as a catalyst for socialization and interactivity, it is helpful to examine the inherent elements and history of the two as separate disciplines.

Interactive TV and You

Interactive TV, at least for our purposes here, encompasses technology and TV content that caters to involving the viewer with the broadcast through forms of active participation. Interactive TV predates Social Television simply because it was far easier to enhance the relationship between viewers and on-screen content than it was to connect viewers to each other.

The first instance of interactive TV was a children's program called *Winky Dink and You*, which went on the air in 1953, long before any sort of social networking. The show required viewers to buy a *Winky Dink* screen and crayons to play along. During the broadcast, viewers would be asked to put the overlay screen on their television, essentially creating a canvas, so that the viewers could complete onscreen activities woven into

the plot of the program.

In the years that followed, programs like *The Today Show*, in the late 1950s, broke new ground by taking phone calls from viewers during their broadcasts, taking the viewer from having a passive role into making them part of the show.

As time passed, viewer participation evolved to richer and more interesting formats, thanks to the availability of consumer technology that mimicked the equipment in television studios, namely cameras. With the proliferation of consumer camcorders and TV-connected players in the mid-1980s, consumers were now not only able to record footage to play back on their own television sets, but they could also have their footage put out over the airwaves.

Local news broadcasts began encouraging viewers to send in "eyewitness" video when camera crews were not able to reach a scene in time, and in 1989, America's Funniest Home Videos became the quint-essential viewer participation television program. The one-hour program, made up almost entirely of viewer-submitted video airtime, became one of the top 10 most-watched shows, with an average of 38 million viewers per episode in 1990.

While America's Funniest Home Videos came into our living rooms perfectly timed for the VHS home movie cultural phenomenon, all submissions were voted on by a studio audience. This greatly limited the sense of community and "reputation" that

could be built up among fans.

With the judging fragmented, limited to those present on the set, viewers at home found themselves often disagreeing and not fully feeling involved with the participatory experience. Allowing all viewers, not just those in the studio audience, to vote and/or curate submissions or affect plot lines didn't have its watershed moment until 2003.

We've often joked that Paula Abdul is singlehandedly responsible for bringing about the Short Message Service (SMS) revolution in the United States. *American Idol* launched SMS voting in its second season and received 7.5 million text votes. That pales in comparison to its most recent season, in which 178 million votes were cast with text messages. In recent years, contestant reality shows have begun online voting via Facebook and Twitter, as well.

The most recent features presented by the interactive TV movement take advantage of viewers who have other devices with them while watching their TVs. Sports franchises such as Sunday Night Football and awards programs such as the Academy Awards offer multiple video feeds and behind-thescenes coverage of their events on second screens for avid fans.

Social TV

Social TV is an additional area of study, along with enabling technologies and products focused on recreating and improving upon the sociopsychological rewards of watching television in a group set-

ting. While the current Social TV movement is in full swing thanks to social media and post-PC device adoption, the use of computer technologies to make television more social and interactive among viewers in disparate locations is not new.

The first computer mediated socialization about TV dates back to the 1970s and '80s on dial-up bulletin board systems, and FidoNET and USENET forums. These interactions did not have great reach beyond computer hobbyists and were often limited to message boards that could take days to update globally, including Internet Relay Chat (IRC) and instant messaging services such as ICQ, AOL Instant Messenger and PalTalk.

In more recent years, several services have popped up on the Web to assist in the congregation of fans around TV shows — other services are just playing supportive roles. There is no denying that TV fan culture is alive and well on the Web, though in varying degrees of involvement.

Passive activities like the "check-in" are seen on apps like Miso, GetGlue and IntoNow (although all of these apps are beginning to add more immersive functionality). These applications both help viewers brag about what they are watching and also help them find new shows to watch based on the declarative statements made by their friends.

The spread of post-PC devices — smartphones and tablets — that not only serve as second screens for viewing

3 SCREENS BY TIME OF DAY Avg. Day Reach (%) **KEY:** ● TV Screen ● Computer Screen ● Mobile Screen Computer use peaks at 10:30 am, and never surpasses TV viewership Use of mobile screens is highest, and fairly consistent, from 10 am to 7 pm 2PM-MIDNIGHT TV viewership peaks around 8:45 pm

content but also are powerful enough for content creation and link-sharing has caused a convergence between interactive television and social television applications.

As these charts show, there is a very high correlation between television viewing and the use of post-PC devices for calls, text and Web/app use. Twitter and Facebook see very high activity during televised events. Twitter, for example, reached 12,233 tweets per second shortly after the Giants defeated the Patriots in the Super Bowl. (Not sorry, Pats fans.) That's 8,169 more tweets per second than last year's big game!

Some analysts speculate that the growth of social behavior, like tweeting, during televised events is related to the growth of tablet usage. Nielsen reported in late 2011 that 70 percent of iPad use occurs in front of a TV, making it seem that tablets are the preferred second-screen device for the couch.

One such application that is focused on the intersection of social and interactive television is TV Dinner. (As the brains behind this start-up, we have to make the disclaimer that everything you are about to read in this section is self-serving, but we are including it here because it really matters. We don't think we'll be the only ones looking to create experiences that make it easier and more rewarding for people to connect while watching TV.)

The vision of TV Dinner is to provide a fun experience for viewers in which they become active contributors to the

NIELSEN REPORTED IN LATE 2011 THAT 70 PERCENT OF IPAD USE OCCURS IN FRONT OF A TV, MAKING IT SEEM THAT TABLETS ARE THE PREFERRED SECONDSCREEN DEVICE FOR THE COUCH.

body of culture surrounding a broadcast or event. The platform essentially fuses elements of interactive television with social interaction. It launched first on the iPad because we felt it was by far the best "couch computing" device.

Viewers become publishers of various types of content while watching their favorite broadcasts. The content can be image captions, poll and survey questions, or simply fun facts or opinions. Viewers are then rewarded for creating content, voting and commenting. They have the capability to earn super status within the community when their content reaches mass popularity.

At scale, platforms like TV Dinner will become a hub of self-expression and a source of rich fan content. As these types of platforms gain popularity, there will be great value in the real-time insights that can be made about our relationship to all forms of media consumption. For now, platforms like TV Dinner make for a fun way to watch television and create and

enjoy fan content in a way not possible with current mainstream social applications.

Despite the media industry's recent obsession with the notion of social television, the "super-fan" has long played a role in the rich culture of television. Fan art and other types of fan fiction have risen from an underground pastime to a mass, countercultural movement — so much so that, one can hardly deem these selfappointed cultural curators as counterculture at all.

While there is a great deal of socialization around television on Twitter, Get Glue and other popular platforms, the most robust fan culture is still seen in the blogosphere. Blogs ranging from the thoughtful and snarky TV Critic (ex: Warming Glow, Hulu's The Morning After) to teenage non sequiturs about pop-culture happenings.

An early example of television fan culture on the Web was Lost. User-generated content around the TV show was unprecedented, but more interestingly, in the beginning it was unprompted. Given the show's vast fan culture, producers began to tease audiences, trying to thwart would-be spoilers. This interplay between creator and viewer gave rise to the popularization of trans-media storytelling, or the unraveling of a plotline across various media types. But trans-media storytelling is not only about the interaction between a story's point of origin and its ultimate destination. Various fan-created podcasts and blogs were created, speculating the happenings of both past and future episodes. Eventually, fan chatter helped shape the actual direction of the show.

Since that time, fan fiction has run rampant on the Web. Show-specific sites such as drunkronswanson.com take fan culture to new and ridiculous heights (that is not to say this site is LMAO great). This site features a single animated gif of Ron Swanson dancing — full screen. As if that were not great enough, it does so at full screen. Go watch it — I dare you to not crack a smile!

Popular mash-up memes based on television have also gained popularity. "Cap Gifs" and the alternate universe (AU) meme have become incredibly popular on the blogging platform Tumblr. In an AU meme. viewers build elaborate screenshots and animations depicting what could have been in an episode or series. Recent AU memes have explored the push-pull relationship between Richard Castle and his boss. Beckett. These creations are due, in part, to the longing that fans have to witness a specific outcome.

We are excited by the rise of new self-expression tools and the ongoing interplay between content creators and fans, and the fans themselves. Some say that consumption is the new production, or more precisely, the act of watching a show has become engaged activity, empowering fans to play a role. Why bother to become actors when we can take part in TV shows, right from the comfort of our own couches?



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A fictional account of real-world

REGIANOL

Self-Scree!

I lurched from the train car, elbow to elbow with a thousand other commuters stepping off New Jersey Transit. I jerked my head to the right and heard a chime indicating my CPRS was online. A bright red arrow hovered in the air before me, analyzing the platform leading to the stairs going up to the main platform of Penn Station.

"Go right." Sean Connery's brogue sounded in my brain as a red line appeared on top of the horde of pressing flesh all vying for the same staircase. As I turned my head, the line flashed green when my best virtual path appeared before me.

IBM's CPRS (Consumer Pattern Recognition Simulator) lets you set the voice that navigated your actions through a virtual commuter game. (Connery's voice had been chosen for me because I was a fanboy.) The app worked for any major New York transportation hub and was the latest in IBM's Smarter Cities offerings. It utilized image-recognition-based augmented reality (AR) to analyze results of multiple predictive formulas to create algorithms based on commuter behavior. The game played out on my iPhone8 contact lenses.

"What arrr yoo prepared to dooo?"

WASHINGTON



Nice. Connery's quote from *The Untouchables*.

I headed toward the stairs. In my urgency, I bumped a woman next to me, and she grunted. In the upper right hand of my vision, I saw my points decrease on a small New Jersey Transit icon.

"F**k!" I muttered, apologizing and letting her pass. In my ear, I heard the sound of a baby crying, and my points dropped even further. The AR in my contact lenses analyzed her past 50 tweets

and discovered she was pregnant. Son of a bitch.

Everyone's actions in the game were tied to real-world penalties and rewards. Early social-based action apps like Recyclebank and DailyFeats were still in use to encourage people to earn free stuff or gain social cred. But apps like Gympact where, by choice, you were penalized by your peers for not going to the gym had become wildly popular. Geek-chic went from craving Klout to demonstrating your accountability, and the craze had caught on with local government and utility companies. For instance, I regularly did my laundry at three in the morning to get a high ABI (accountability based influence) score from Opower, the leading social network based on the Smart Grid.

And in my case, my next month's commuter pass would cost about 50 cents more because of bumping a pregnant lady. So now I had to make up

my points via speed. I started walking fast. A heart-shaped icon appeared in the upper left of my vision as the pulse monitor watch grew snug on my wrist. If the heart went from red to purple, my doctor would get a text indicating I was at risk for cardiac arrest. The monitor went all the way to magenta four times one month, and my insurance premiums increased.

Once at Penn Station, I headed for the stairs, noting the commuter-gamers outside Starbie's. (Certain SIMs let you order your coffee mid-play, so you could pick it up right away and mobile-pay.) Distracted by the aroma of fresh-brewed coffee, I stumbled on something large at my feet. I looked and saw a large sack of grain. A money icon appeared in my vision over the bag, so I pulled my eyes to the left, indicating I would take the points for the grain. Frustrated by having to wait for the points to tally, I kicked the sack, hard. Then I ran upstairs.

As I neared the middle of the station, a red stop-sign icon filled my vision. I paused, not sure what was happening. Virtual Air Rights codes had deemed it unlawful for advertisements or any game component to trick someone when using augmented-reality-based app functionality.

I heard a new voice in my ear. "Chuck, look up."

This freaked me out as none of my voice-recognition software was programmed to speak unless I spoke first. And most of my SIMs used eye tracking or Microsoft Kinect to recognize my gestures before I heard external voices in a game.

I looked up as I heard the board clicking, the shifting words forming the following phrase:

All the world's a screen, and we are merely layers.

I stood for a long minute, gazing at the board and not really comprehending was what happening. I vaguely registered that my contact lenses were in "reality" mode,

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SIMPLY ACCESSED
VIDEO OR OUTERNET
FEEDS FROM CITIZENS
WHENEVER THEY

meaning the board actually said the words I saw above me.

"You a Shakespeare fan?" The voice came again.

"Sure," I said, turning to see where the voice was coming from.

"Up here, Chuck." I looked back at the board and one side of the screen was shaped like a smiley-face icon. The lips moved when it spoke.

"Thought I'd go with a smiley face versus a scary Tron-looking thing. Besides, Tron Part Two sucked."

"Agreed."

"They call me the Bard. A few years back, MOMA did a real-time data exhibit thing, and they ran Shakespeare quotes on my screen. Somebody got cute and took the 'o' out of 'Board,' and it trended on Twitter, so here we are."

I looked at the other side of the screen, opposite his "face." "So what's with the quote? Am I a 'mere layer'?"

I assumed the metaphor had to do with the Smart Grid, where the notion of Big Data meant that with networked Artificial Intelligence, we'd arrived at an Internet of Things mentality. In a sense, everything with a chip in it was alive, or in this case, a layer. Being a geek, I'd felt the whole idea (Singularity) was inevitable, starting around 2011 or so. I was also sure Bard was hooked to the Internet and dozens of cameras in the station that pumped images he could access anytime from the cloud.

"Sort of," Bard responded. "Don't get pissed, but I accessed your email and social channels just now."

I wasn't that pissed. "Privacy" had a whole new definition these days. Since a GPS knew where you were at all times and everyone's virtual games were hooked real time to the Web, government types simply accessed video or Outernet feeds from citizens whenever they wanted. Everyone's lives were recorded at all times. According to CNN, no event occurred without at least two

cameras recording what happened for potential public usage. News and law enforcement had become whole different animals the past few years.

"Why is my foot wet?" I said, interrupting Bard as warm liquid seeped onto my right foot. I looked down to see my black loafer had a dark stain.

Bard spoke quietly. "That's what I'm trying to tell you, Chuck. Look."

His screen switched to an image of me arriving at the platform downstairs from a few minutes ago. I saw my journey from the train and could tell I was in my game since my eyes appeared glazed and distant. The camera views switched a few times, from commuters to station cameras and back. And then as I turned a corner, I saw myself stumble where I had kicked the sack of grain.

But it wasn't a sack of grain. It was a homeless guy. He had blocked my path and I had stumbled hard into his arm. And then I watched in horror as I pulled my foot back and kicked him squarely in the face, breaking his nose. Blood poured onto my shoe as he clutched his face in agony while I simply took a step back while my points tallied.

"You weren't supposed to kick the grain, Chuck," said Bard. "That's what the money signs are for. Kicking good things means you lose points. But you were too fast. And Tom sat up at a bad moment."

I couldn't move. The image of me kicking the homeless guy — Tom kept playing over in my brain. It was an image I knew I'd never erase. And it wasn't a game.

What kind of man am I?

I stood for a long moment, gameblinded commuters rushing by. For once I heard the sound of shoes on pavement - no soundtrack, no sound effects. This was reality. And it sucked.

"Chuck."

I looked up. Bard had cleared his screen, and the following words appeared slowly, one by one: What are you prepared to do? About a year later, on my birthday, Bard said he had a surprise for me.

"Turn on your CPRS game."

I did, and my commuter SIM went live. Bard had hacked it so it was pointing downstairs, and I followed the arrow to the spot where I had kicked Tom. Instead of a sack of grain, I saw a huge virtual package with the words "The Impossible Idea" written on the side. An icon on the upper left of my vision flashed, indicating it would open if I moved my eyes quickly

My Impossible Idea had been fairly simple. I quit my job and volunteered at the Robin Hood Foundation to create an app that rewarded people for kind actions to the homeless in New York City. Gwyneth Paltrow was their spokesperson and with her avatar in the SIM, the game took off. Starbucks joined in, and pretty soon the pay-it-forward mantra went full swing in Penn Station. Within a few months, people donated their Klout perks and accountability bonuses so that actions generated behavior change as well as words.

So now I looked at the spot where I had kicked Tom, my life transformed by a mistake. I moved my eyes to the left, and the virtual package fell open.

And I saw Tom. He was clean-shaven, waving and smiling. He was piped in via Skype, wearing the Robin Hood T-shirt they'd given him the day we first met. He'd gone from being a volunteer to a full-time staff member, and gotten the first assisted-living residence made via profits from my app.

I smiled. "Thanks, Bard."

Staring at the spot, I blinked three times rapidly to turn off my SIM's contact lenses. My vision cleared of all icons, layers disappearing between me and the empty pavement where Tom used to lie.

And it was empty.





On April 23, 1896, at Koster and Bial's Music Hall on West 34th Street in Manhattan, an enthusiastic audience witnessed an event that marked the beginning of a long evolution — one that is only picking up speed today, and with surprising ramifications. Unusually for Koster's, the stage was occupied that evening not by any performers, but by a blank white screen measuring 20 feet by 12 feet, paired with a small booth covered with blue velvet that stood in the middle of the balcony.



SHATTERING

If you think interactive television is interesting, wait till you're wearing your news, information and entertainment, or just seeing it in the air around you.

BY MARK WALLACE

THE SCREEN



While the patrons enjoyed the refreshments that Koster and Bial pushed both there and at their beer garden a few blocks south (alcohol having better margins than ticket sales, after all), "an unusually bright light fell upon the screen," as *The New York Times* wrote the next day. As they watched, the audience was treated to the image of "two precious blonde young persons of the variety stage ... doing the umbrella dance with commendable celerity." The audience roared its enthusiasm — and with that, the first public exhibition of a motion picture, the screen as conduit for visual entertainment entered the American public's consciousness for the first time.

That was more than a century ago. Screens have changed a great deal since then. But they've changed not nearly so much as they're about to now, and not in the next 100 years, but in the next 10, or maybe even the next one or two.

It took nearly 50 years for movie screens to give way to television screens on anything approaching a widespread basis. What was the

experience of a community was now something more intimate, an activity one took part in with family or perhaps a few friends. Nearly 50 years after that, smartphones made screens into a portable experience, changing the nature of our interactions with them again. Having our own personal viewport to the rest of the world altered how we interacted with information and each other as well.

But although we've seen the birth of movie screens, television screens, IMAX screens, flat screens, hi-def screens, touchscreens and more, we're now on the brink of a revolution, in both the technology and use of screens, that will change how entertainers and marketers do business for many decades to come. Not only will the revolution be televised, but it may be worn like a piece of clothing, rolled up into the size and shape of a small pen or simply appear as if by magic in front of your eyes.

What are the implications of this new age of attention? There are many. Entertainers and marketers both will need to be agile





enough to live comfortably in any of those form factors and more. Planners are already starting to take into account the fact that screens no longer occupy a fixed time and place in the lives of Americans and the rest of the world — but soon enough (it is beginning already), a screen will not only be a utility you can take with you anywhere you go, but will become something that meets you on the go, whether you've taken it with you or not, as public screens proliferate and come to know more about who is watching them and when. The challenge will be to understand what kind of message is right for what kind of screen at what time and for what consumer. Because what's happening is a *fragmentino* of media consumption unprecedented in the history of media — nothing less than a shattering of the screen as we know it, into a myriad of modes and devices that in the end represent more of an opportunity than a challenge, at least to those who know how to view them.

Taller, Thinner, Brighter, Better

The Consumer Electronics Show in Las Vegas this January prompted talk of "the end of trade shows" and the irony of waiting in long, nearly stationary lines to check out the latest mobile gadget. But it also provided a glimpse of the new reach of screens that are set to hit the market in the next few years: bigger, smaller, thinner, lighter, brighter, more flexible and even transparent screens all put in an appearance.

FIVE THINGS WE CAN'T WAIT TO SEE



SCREENLESS DISPLAYS

While proper 3-D holograms ("Help me, Obi-Wan Kenobi. You're my only hope!") are still a long way off, the first screenless 2-D displays do exist today — if you can swallow the \$50,000 price

point charged by companies like IO2 Technology. For the consumer market, screenless displays — projectors that cast images into thin air rather than needing a surface to project on — have yet to make an appearance. Imagine setting your smartphone on a table at Starbucks and seeing your computer desktop pop up in the air (as you type on a virtual keyboard that's projected onto the table, and move files around with a flick of your finger in the air).



SMART CONTACT LENSES

Barring images zapped right onto your eyeball, how about images appearing in your contact lenses? Researchers at the University of Washington in Seattle have recently made strides toward that reality — though at the moment their lenses display only a single pixel and have been tested only on rabbits. Combined with the next generation of

sophisticated augmented-reality technology, though, contactlens displays could make a host of information available to you on a hands-free basis.



RETINA PROJECTION DISPLAYS

No less a technology guru than Bill Gates has predicted that the next generation of screens will consist of images projected directly onto the retina of your eye. While screens measuring up to 84 inches were on display, the next sweet spot for home entertainment looks like it will be the super-thin 55-inch OLED screen, versions of which were on offer from both Samsung and LG Electronics. Sony also showed off a 55-inch screen, composed of 6 million LEDs in place of plasma pixels. OLEDs, or Organic Light Emitting Diodes, produce sharper pictures in deeper colors than the current generation of screens, but are generally too pricey for consumers. At an estimated \$8,000 for the 55-inch screens, which should hit the market this year, that hasn't changed much yet. But it soon will. As it does, consumer expectations for the quality of content that's streaming to their homes will rise. As the march toward ever-higher quality images continues, consumer expectations will continue to rise. To keep up, production quality of both programming and marketing will need to stay ahead of the curve.

Samsung's 55-inch screen is also now thinner than ever: try half an inch. While that's convenient for hanging on your living-room wall, it has more interesting implications for another technology the company will soon be bringing to market: the see-through TV. Samsung's LCD is as transparent as your living-room window — or the window in your office, which is where it's more likely to be installed at first, according to Samsung product manager Scott Cohen.

The Transparent Smart Window is just that: transparent. LCD images appear on a pane that also admits the view beyond. The

Smart Window is also a touchscreen, bringing images of the Tom Cruise paranoia trip *Minority Report* to life very effectively. While Samsung envisions the Smart Window hanging in the office of an inventory manager overlooking a warehouse floor, transparent screens have many more interesting uses than that, including desktop monitors that let people on either side of the screen flip images back and forth; apartment windows that display weather reports or overlay traffic conditions on your view of the city; automobile windshields that give visual driving directions and traffic alerts; and even bathroom mirrors that display news or shows while you're brushing your teeth in the morning.

Screens Are More Mobile Than Ever

Examples like these start to get at the kind of ubiquitous presence that screens will soon begin to have in almost everyone's lives. But screens are also about to take on new roles outside the home or office. While we're not yet at the point at which screens can recognize and identify a sidewalk stroller by reading his or her retinal image, we're getting close — close enough to bring new meaning to the phrase, "For your eyes only."

One technology just now hitting the market is lightweight video-enabled eyeglasses from companies like Vuzix, whose line of "mobile video eyewear" was also on display at CES. The Vuzix glasses incorporate high-definition display technology into the

An idea that has cropped up in science-fiction novels since the '50s (including The Space Merchants by Frederik Pohl and Cyril M. Kornbluth), retina projection displays have been prototyped once or twice since then, though the obvious constraints of the technology — such as viewing angle and possible damage to the eye — mean that progress will be dependent on advances in related technology. Still, the thought of having a *Terminator*-like heads-up display at your disposal is a compelling one (provided you're not planning on traveling back in time to assassinate the savior of the human race, that is).



REAL AUGMENTED REALITY

At present, augmented reality consists of little more than geolocated markers that can be overlaid on a map or image of your surroundings, and at a relatively coarse level of precision that has, thus far, kept such applications from being really useful. But when augmented reality can actually alter your picture of the world around you - by mapping images more precisely to the buildings, objects and people that are in your view — look for it to work deep changes in how we understand and interact with

our surroundings. Whether you plan to access this information on your smartphone, in your Vuzix eyewear or via your smart contact lenses, you'll first have to wait until better object recognition and pinpoint geolocative technologies are developed — but rest assured, they're on their way.



THOUGHT-CONTROL CURSORSBesides being pioneers of contact-lens display technology,

the University of Washington is also working on what amounts to electronic telepathy: using brainwave sensors developed there, subjects are able to move a cursor on a screen just by thinking of vowel sounds in their heads. Emotiv Systems offers a "neuroheadset" that can be used to control games and other applications, and NeuroSky is selling "brainwave sensors for everybody." It will be some time before the technology is cheap enough to attract a market meaning few developers are creating useful applications for it at the moment. But as the headsets come down in price and size, expect the screens of the future to start reading your mind. M.W.



lenses and earpieces of a pair of shades that aren't much more bulky than your Oakleys. Chill out with a private movie on your flight, play a game while you're "looking" at the spreadsheet on your desktop screen, or, with Vuzix's Industrial Augmented Reality technology, have access to a virtual world of information overlaid on the real world around you. Perhaps most amazing about the Vuzix glasses: They're available now, can display movies stored on your iPad or iPhone and list for retail price points as low as \$169.99.

Eyeglass screens and augmented-reality applications promise a new world of mobile media — including the potential to pinpoint audiences of one, and reach them wherever they are, whether at home, at work or on the go. Bring augmented reality into the mix and yet more possibilities arise: Media, entertainment and marketing messages will be integrated into the world around the viewer in a seamless fashion, so that consuming media becomes as much a part of walking down the street as reading street signs or billboards.

Moving the mobile screen from a handset to the valuable real estate right in front of your eyes means purveyors of local information will need to step up their game. The GPS unit in your smartphone means video eyewear will be aware of its location. While it won't quite be *Minority Report*, expect to see ads and information targeted on a more localized basis as the technology evolves.

Street signs and billboards will be changing as well. Small screens in public spaces are set to proliferate. Rather than static advertisements, however, expect these displays to interact with

Some LG TVs already come with Skype pre-installed those who stop to consult them, delivering information about their surroundings and potentially acting as hubs of social interaction. As this happens, expect public screens to act more like



private ones — with the added advantage of delivering localized information, advertising and the incentives that will be key to get passersby to stop and take a second look.

The Second Screen Takes on More Weight

All the talk of augmented reality is well and good, but the fact remains that AR technology still requires us to look at one screen in order to enhance our main view of the world. Until the experience is smoother, it's unlikely we'll see widespread adoption.

In some cases, however, enhancing a first screen with a second one is just the ticket. Television is a case in point. The future of TV is social, but it won't all happen on the same screen your program appears on. Social TV apps already let viewers connect to people watching the same program, and provide chat, games and other functions in a parallel, interactive stream. Rather than getting in the way of your viewing or requiring a bulky desktop screen, these interactions will very likely live on your iPad or other tablet, and be

THE FUTURE OF SCREENS

FIVE THINGS THAT WON'T CHANGE



REMOTES WILL ALWAYS SUCK

Despite the fact that both voice- and gesture-controlled TV sets were on display at this year's CES, our relationship with remote control of our screens just isn't going to change. When you can change the channel with a wag of your finger, what happens when your dog walks by and wags its tail? Thought control (see "Five Things We Can't Wait to

See" sidebar) could change that, but don't count on it. While the days of digging in the couch cushions for the remote will soon be behind us, look for a whole new range of problems to arise as we shift to new control schemes and new devices (or virtual ones).



THERE WILL ALWAYS BE COUCH POTATOES

Despite bad remotes.

delivered via an app like TV Dinner, which is produced and distributed by the guest editors of this issue. (See page 70 for more.)

Social television means that marketers and content producers will be subject to new rules of influence and interaction: Recommendations and ratings will take on new life and new power, but this also means that the strategies that work will be amplified that much more effectively. New rules of the road will be drawn more from the playbook of the Web and social media than from traditional media's broadcast model.

The mere mode of our interactions with the most common of screens is due to change as well. On display at a number of booths at CES were televisions that are controlled either by voice or by hand and arm gestures that are monitored by a built-in camera — not that this will solve the problem of an intuitive remote control system. Some of Samsung's "smart TVs" know who you are as well: The camera is also used for facial recognition, switching the set's preferences and presets depending on who's watching at the time.

Samsung and others are also pushing the TV set as not only

the center of home entertainment, but the heart of the home's command center as well. LG Electronics is already selling sets that come with Web communications service Skype pre-installed, and a number of sets can now display uploaded photos and videos.

For those who just want to reach the eyeballs that will still be glued to the screens of the future, the road ahead is anything but simple. What's happening is that the picture is losing focus: The TV set is no longer the center of a viewer's undivided attention, and even computer and mobile phone screens will be challenged in the years ahead. It's difficult to make viewers ooh and ahh the way Koster and Bial's patrons did over that 1896 umbrella dance — although technologies like screenless retinal displays could definitely result in raised eyebrows. But although the road ahead may be more fragmented than before, it will also be filled with opportunity. Web-based content has thrived by embracing the niche and the vertical. Now, the increasingly rapid evolution of screen technology may start pushing more traditional media producers to do the same. \square



BIGGER WILL ALWAYS BE BETTER

Though we're seeing the proliferation of smaller and smaller screens — and will soon be seeing screens that have no physical presence at all — we will continue to see the development of display technology that can present bigger and bigger images as well. The largest screen in the world is currently the 16,000-square-foot Panasonic screen at the Charlotte Motor Speedway — but at 200 feet by 80 feet, that leaves plenty of room for expansion. As projection and display technologies improve, expect to see screens that cover the sides of buildings — or areas much larger than that. Why waste a transcontinental flight staring

at the scenery, after all, when you could be seeing mile-wide advertisements on the ground below?



WE WILL ALWAYS ARGUE ABOUT WHAT TO WATCH

No technology in the world will change the dynamics of social behavior that arise when two or more people sit down together to pick a program. Even shows that capture the broadest of audiences can't entertain everyone all of the time. And as audiences become more and more fragmented (see No. 5, below), producers and broadcasters will have to spend more and more of their resources competing to capture eyeballs in the first place.

From that perspective, arguing over entertainment alternatives is a good thing: It represents an opportunity to convince someone who hasn't yet made their choice. And social TV (see article, page 46) will complicate the scene yet further, extending the debate to encompass people who aren't in the room.



THERE WILL NEVER BE ANYTHING ON

A corollary to No. 4 is the

current paradox of cable television, which mirrors a phenomenon known as the Paradox of Choice: Past a certain point, presenting someone with more and more alternatives makes all of them seem less and less attractive. As programming becomes more and more specialized, fragmenting itself into verticals that address exceedingly specific niches, it will become easier to find just the kind of thing you had in mind — but if you just want something entertaining, it will be nearly impossible without first narrowing your choices. When there are 237 channels showing different flavors of action movies, choosing between them becomes nearly impossible. Again, social TV will help with this, but without new strategies expect things to get worse before they get better. M.W



Mobile augmented reality. You've undoubtedly heard the hype by now. You've probably even taken one of the numerous marketing applications for a spin and idly tweeted or Facebooked the results, immediately pushing to the entirety of your social network a photo of a prominent celebrity or cartoon character's face superimposed over your own. Or a photo of you standing next to a 3-D model. Maybe a screenshot of a 3-D model you "discovered" or "unlocked" with the camera of your smartphone.

This sort of experience is both a blessing and a curse to the industry. Though often entertaining, the "wow" factor of AR as a visual medium is only the beginning of designing a marketable and successful experience (just as it is in visual advertising). Lately it seems as though some app developers exploit and optimize this aspect of the technology without creating features that bring the experience beyond just visual engagement.

As a result, we often see AR limited in interpretation as a purely optical technology. It is not uncommon for a journalist to describe AR in terms of "Terminator vision" and headmounted or heads-up display interfaces while writing of an AR application that allows the user to either see floating navigational indicators — information that has no direct referent in reality,

merely GPS data converted after-the-fact — or a static 3-D model of a bunny rabbit ... attached to an image of a 2-D drawing of a bunny rabbit.

Portraying AR as a chiefly visual technology isn't wrong, exactly. It originally came from computer-vision and optical-recognition research. And there are untold uses for this kind of interface. GPS and navigational experiences are still welcome additions to the AR ecosystem, but they lack the real-world interaction of computer vision-based experiences. Even those, as in the case of the "bunny rabbit" example, can leave something to be desired.

Mobile augmented-reality experiences now dominate the market, compared to Web and offline kiosk installations. And with the advent of sophisticated mobile devices with complex on-board sensors

and cameras, AR is starting to move beyond the common point-and-view interfaces to merge data from all of these elements in order to arrive at immersive and intuitive augmented experiences.

Look at the recent developments from San Francisco-based start-up QuestVisual, which pioneered mobile Optical Character Recognition (OCR) with their famous iPhone app, *Word Lens*, which instantly translates foreign text to your native tongue just by waving the camera over it. Throw in a dash of data from the GPS and you could have an app that naturally translates visual text based on the *location* of the user.

Sensor fusion will be the next great frontier in mobile AR. It will provide a more robust and natural way to access and analyze real-world data using location, movement, position and gravity - before the camera even comes into play. And, yes, sensor fusion sounds as if it's some sort of sci-fi amalgamation of components - barometric compasses and accelerometric thermometers come to mind. But it's more about merging information. It's the combination of data coming from two or more sensors on a device in real-time to create a new set of information and to arrive at a novel experience, based on that merging of that data.

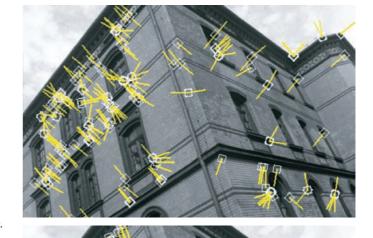
It sounds futuristic, but these days the average smartphone comes with an impressive array of internal gadgets: a gyroscope for orientation; an accelerometer to detect movement; a digital compass. The iPhone has both ambient light and proximity sensors. An Android device carries a barometer.

Let's say your phone has sensors that can calculate orientation, position, location and barometric pressure. With the input of geographical, urban, weather and astronomical data, you could potentially calculate the exact position and trajectory of the sun based on the user's location. It's not difficult to envision a mobile application that can direct people to locations where they can get the best view of a beautiful sunset, or the best spot in the city to get sustained sunlight over a specific period of time. An app, of course, sponsored by a sunglass company.

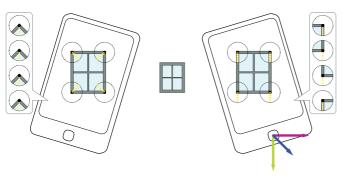
It won't be pretty, at least not at first. Sensors are not unlike colors: Haphazardly mix them together and your result will look ... unsightly. The idea is to discover combinations that will enhance the overall quality of an experience. In almost all cases, the fusing of two or more sensors needs to be relevant to the device's camera in order to improve an augmented experience. So this was the question

AUGMENTED REALITY COMES

Thanks to gravity, AR gains a cool new edge by trak Lord



Fusing data from sensors already in most smartphones with mobile cameras allows Metaio to align augmented reality information with gravity. Since the camera knows what is up or down and understands what it sees, adding digital information gets easier, like orienting windows on the side of a building. Realtors could then offer in-depth views of available apartments. Marketers could overlay the building with digital murals.



for the Metaio R&D department: How do we combine sensors in a way that enhances optical recognition and image tracking? In other words, how could we make the phone's camera smarter? Though the methods were complex, the answer was simple. We align everything according to one of the most basic principles of our day-to-day lives: gravity.

Through algorithms and the fusion of sensors (movement, orientation) with optical data from the camera, we were able to teach the smartphone how to see with respect to up and down. Imagine trying to do anything in your daily routine without a sense of up and down - or even better, imagine if the concept and effects of gravity were completely alien to you. You'd be floating around in near chaos trying to

make sense of your environment, much like the camera on your phone before we taught it to understand its surroundings. We taught it orientation.

With our software, mobile cameras no longer search for independent points of contrast when trying to recognize images. Aligning the camera with gravity supplies a constant framework for processing images. Take the facade of a brick building: Every window on that building has an almost identical set of contrasting features (see Fig. 1). With Gravity-Aligned Feature Descriptors (GAFD), the camera automatirespect to up and down. The inertial sensors work to give the camera an understanding of what it sees. With a standardized orientation, overlaying the side of buildings with



The implications border on science fiction. Looking at an office building from the street level and immediately determining what windows correspond to different commercial real estate listings: selecting the highlighted window yields a 360° navigable photograph, pricing and lease information, and direct access to the realtor. An urban scene marred by graffiti is restored to its original state for photographs. Virtual, interactive murals that span city blocks. Every poster or billing for a film or concert yields a corresponding visual key and information on how to attend. Furnish your home or office without tape measures or blueprints. And that's just the beginning.

GAFD works on a smaller scale as well. Recognition comes faster; tracking is smoother and it sticks. That virtual bunny rabbit you just discovered on the cover of a magazine isn't going to jitter uncontrollably

(unless it's supposed to). Virtual objects and animations will be more attached to their anchors - whether they're a building, a newspaper, a product package or a business card - and they'll behave more realistically. Candle flames on virtual birthday cakes will always point to the sky, just like in real life, no matter how you tilt the reference image. This technology is so subtle that you may have even believed that AR already worked like this.

It didn't. But it does now. In the not-so-distant future, we will be able to access astounding amounts of information from our surroundings, just with our smartphones. There may come a day when it suddenly hits you how intuitive the process of interacting with your surroundings has become. And you'll pause, marveling that it all began with a phone's camera and a gyroscope. Welcome to the augmented world, where the digital is as natural as gravity.



cally orients each window with

TO MOBILE

marketing untethered



CONSUMERS ARE ADOPTING MOBILE TECHNOLOGY AT A FAST PACE – OFTEN FASTER THAN MARKETERS CAN KEEP UP WITH, AND IN WAYS NOT EVEN THE MOST SKILLFUL MARKETERS ANTICIPATED. WITH THE INDUSTRY SPOTLIGHT BLAZING, AND WITH BIG MEDIA BUDGETS HEADED ITS WAY, IS MOBILE READY FOR PRIME TIME?

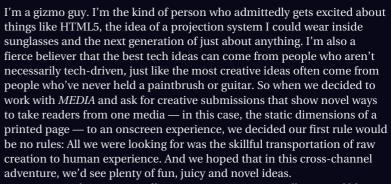
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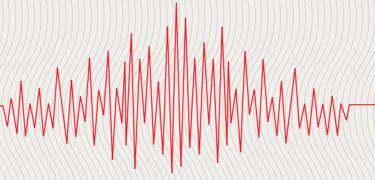
Creative Crowdseureing:

The MEDIA/CIRCLUS EXPERIENTIAL PORTFOLIO



We were right: First up, Jeff Newman, musician, art collector and blogger, combines his two loves for us — art and music. He rounded up five of the most progressive fine artists working today, and laid our project on them, asking them to link their visuals to music — in some cases, their own compositions. Scan the barcode with a QR reader (we like RedLaser or iBarcode), and think about how the meaning changes as you sample different audio streams. (Full disclosure — Jeff and I went to high school together in Syosset, N.Y., and have played in bands in the past, so I can vouch firsthand for the guy's creative spark. You can read his blog at theartcollectors.com, and listen to his band, Hunters, Run! at huntersrun.bandcamp.com.) Adam Broitman





SOUND ON SCREENS

Sound on Screens is an exploration of the ability to shape meaning through modal confluence. The following pages contain images by various contemporary artists, juxtaposed with QR codes. Each code links to different music compositions, adding layers of meaning to the visual work.

Instructions: Scan the bar code with a popular QR reader (Red Laser and iBarcode are both good ones) and think about how context changes meaning as you sample the different audio streams. The implications of the art are shaped by a variety of factors:

- ► The presence of the mobile device as a conduit between the physical and digital divide
- ► The recontextualization of art from gallery to print
- ▶ The addition of meaning through auditory enhancement

The inclusion of this work was to demonstrate how technology could facilitate story. Though this approach leverages fine art, commercial art can benefit just the same.

For our Sound on Screens project we enlisted the help of musician, art blogger and collector, Jeff Newman. Newman writes about art and culture at theartcollectors.com and plays in the New York-based rock band Hunters, Run!, who can be heard at huntersrun.bandcamp.com.

Jim Houser







Jim Houser's multimedia installations are fantastically inspirational. Through his use of recurring characters, symbols and text, he has created a visual language and poetry that is distinctly his own, typically accompanied by homemade music. For "Signal to Noise," Houser uploaded clips of three of his new musical compositions, so viewers can get a mulitisensory experience, as if they were visiting one of his gallery exhibits.

Jim Houser, Signal to Noise, 2010, acrylic and collage on canvas, 36 x 48 in.





Daniel Rich

Daniel Rich translates photographs into painting that call attention to the symbolic role architecture plays in politics. With "Drone," an almost abstract view of the optics of a U.S. Predator drone, as used in Afghanistan, is linked to Kraftwerk's "Man-Machine," Rockwell's "I Always Feel Like Somebody's Watchin' Me," and the new Afghani national anthem.

Daniel Rich, *Drone*, 2011, acrylic and enamel on dybond, 47 x 50 in. Image courtesy the artist and Peter Blum Gallery, New York.















Greg Lamarche's colorful paper collages are meticulously crafted from magazines dating back to the 1950s and 1960s. To accompany type that looks like it was pulled from a 1970s Blaxploitation film poster, the artist included songs by James Brown, Bill Withers and Sly and the Family Stone, each commenting on the duality of human nature, the "Blessing" and Curse" of mankind.

Greg Lamarche, *Blessing, Curse*, 2010, hand cut paper collage, 22.5 x 17.5 in

Greg Lamarche





Andrew Schoultz



Andrew Schoultz's densely layered chaotic murals and paintings mimic contemporary politics and public affairs, creating a confounding experience. Ministry's "N.W.O.," Neil Young's "Cortez the Killer," and Fugazi's "Smallpox Champion" are also highly political, commenting on the military industrial complex, existing power structures, and imperialism.

Andrew Schoultz, Communication Destruction, 2007, ink, acrylic, and collage on paper, 38×50 in. Image courtesy the artist and Mark Moore Gallery, Los Angeles.







Tomokazu Matsuyama's paintings serve as a reconciliation of the cultural tensions of his own Japanese-American identity, while playfully addressing broader issues of nationalism. Matsu left the music choices to Jeff, who links them to Michael Jackson's appropriation of "Behind the Mask," the 1978 song by Japanese synth-pop band, Yellow Magic Orchestra, as well as the Ramones' "Rock and Roll High School," covered by Shonen Knife, a Japanese girl punk band.

Tomokazu Matsuyama, *Toys and Candy*, 2011, acrylic and mixed media on canvas, triptych, 84 x 180 in.



Tomokazu Matsuyama









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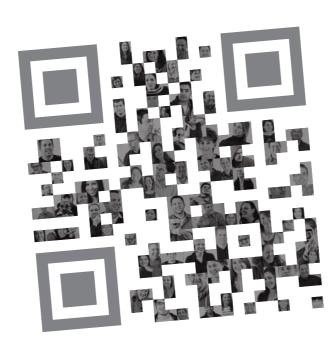




PRINT COMES TO LIFE

SAN FRANCISCO SPCA

On a much cuddlier note, Red Bricks Media, a digital marketing agency that works with clients such as Conde Nast, the University of Phoenix, Hitachi and the San Francisco SPCA, combines QR codes with a mobile app to let you download the dog or cat of your dreams, and picture it in your own living room. (Then go get the actual pet, and think of yourself as an early adopter.)



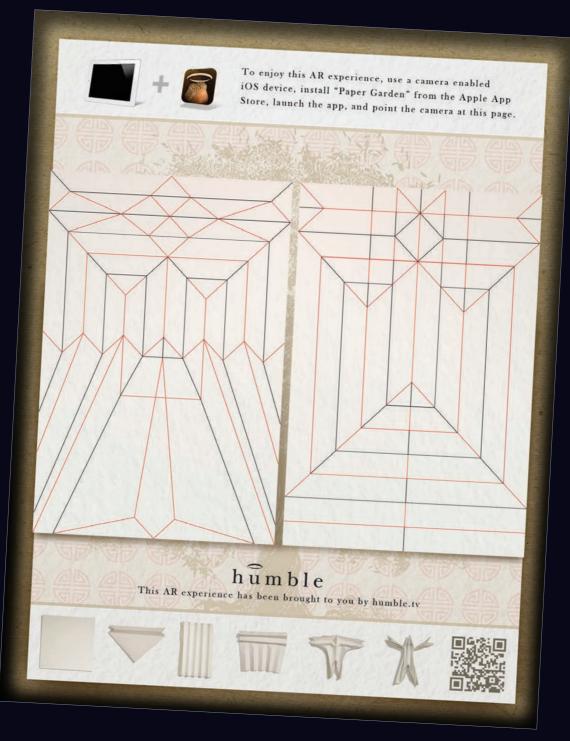


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ALLEN & GERRITSEN

Allen & Gerritsen wanted to speak to the human side of QR codes and to tip its hat to the innovative and creative spirit of its employees. I wanted to include it here because it's a clever ad for the agency. (And, yes, those are all A&G staffers embedded in the pixels.) But it even had clever placement: The agency ran it on the back page of the Boston Globe's Top Places to Work 2011.





HUMBLE TV

And finally, I'm crazy about this augmented-reality page created for us by Humble TV. Yes, to experience it properly, you need to download an app called Paper Garden from the Apple App Store. And, yes, I know, downloading another app is extremely annoying. But I promise, it's worth your while: It uses AR to create an intimate narrative, with a beginning, middle and end. As a viewer points their device at the page, they see two characters fold and twist into shape. What follows is a small, but still emotional story of reunion, separation and rebirth.

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GUEST EDITORS

Adam Broitman and John Swords, Circ.us

BY CARRIE CUMMINGS

What did you learn from this experience?

Adam: No matter what people in agencies say they are going to do, it doesn't mean they are going to do it [laughs]. Seriously, we had hoped more agencies would want to contribute their ideas and screens experiences. I think that the whole collaborative effort is very difficult. It's great in theory. But people are busy and don't necessarily have the time. But I'm very happy with the contributors that we had. It was also fun to just talk to people about this as we were gathering ideas. I think it's the agencies that are really getting themselves out there and getting new business that are the ones who get to try new things. The ones who submitted these ideas are the ones who are winning big awards, too.

John: It's a commitment to innovation.

Given what you know now, what would you do differently? John: Hire writers! It's been a long time since I've written

that many words, so it was a

challenge.

What do you think about the future of print as a medium not just for ads, but for idea expression?

Adam: When you look at the numbers over the last five years, one could probably argue that in a sense, print





is relatively dead. We're seeing a shift away from traditional magazines. I don't think there will ever be a point where the print magazine totally doesn't exist, at least in my lifetime. I just think it may be three pages with interactions. People still like analog assets. They still like things they can

touch and memories they can put on their walls. The role will just become more of an activation for other experiences.

John: Print has a place in solving the out-of-sight, out-of-mind casual engagement of reading solution, until we reach the point where screens are embedded and convenient in every surface. We haven't replaced, nor will we replace, sticky notes and white boards for a while, because we simply don't have cost-effective solutions. When we can project onto coffee tables and whatnot without having to worry about cords, that's when it will change. What people are missing with digital is the presence of contents in their surroundings. We're getting there. But it's just not in our environment in the same degree, and at the low cost, that print can be.

Well, can't you say that print is more valuable than digital? It costs more money to print magazines and newspapers. Paper gives stories weight. How will you be able to distinguish the good from the bad if everything goes online?

Adam: Isn't that just a perception from how you approach things online? If you are 10 years old now, you may not have that idea that premium value is placed on the printed word and online may have less of a premium. There is a premium element to the printed word on paper for the time being, but I think it's a conditional thing — some-



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A SCRATCH-OFF.
IT'S A GIMMICK IF
YOU'RE JUST SENDING
SOMEONE TO A
URL BECAUSE THE
PRACTICAL REALITY
IS THAT MOST PEOPLE
CAN TYPE A SHORT URL
IN A SHORTER TIME."

JOHN SWORDS

thing we've been taught. I'm sure a new generation will learn differently.

I have an iPad and rarely use it. I prefer magazines and newspapers.

John: That's interesting. There is definitely a nostalgic value. It's interesting when you go to magazine paper, the different feels and smells. But with an iPad, when you use one device for everything, you lose that feedback. It's always the same experience. It always feels like my iPad. I've completely acclimated to this. But I never read a newspaper or magazine religiously — only online.

QR codes? Fads?

John: QR codes are only good for deep links. A QR code is like a scratch-off. It's a gimmick if you're just sending someone to a URL because the practical reality is that most people can type a short URL in a shorter time. Where it gets interesting is where you're doing dynamic printing and you want to give everyone a secret unique URL that is in code and isn't readable, then you have to scan it. Or if you're going to make a URL and, for some strange



reason, it has to be huge and it takes too long to type, then it's useful. Do you agree?

Adam: I do think QR codes will become obsolete within the next five years because they will be replaced by other technologies like visual recognition. Where you can just hold your phone over something and it will recognize it, or there are chips in magazines. I think the way QR codes are being used today is gimmicky.

Back to the magazine, do you have any regrets?

Adam: This was time consuming! I wasn't necessarily prepared for the amount of time this would take. Doing it again, I would plan better from day one. We're lucky that the MEDIA staff helped us out a lot so the book is going to be great, but a little more upfront planning would have made it more aligned with what we had envisioned upfront. We don't have the collaborative element we wanted at the outset, but the book is still great.

John: I think that the way a lot of this operated, I was writing and looking at the entries and Adam was fielding the front-end stuff. The general theme is that the agencies' eyes were bigger than their stomachs in terms of companies who didn't deliver.

Last question: Would you take what you learned from this magazine — will you take any of it — to your professional life?

Adam: I'm absolutely not going to become an editor.

John: I can tell you through the process of writing the piece on television — I've read two different books on writing style and conveying thoughts. I used to write a fair amount, but then I became focused on production writing, so I had a hell of a time going back to this journalistic writing — explaining what I think or the history of certain things and how they equate. It was a total change. It will make my client writing more interesting. At the end of the day we found this to be an extremely influtential and positive experience.

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